“Florida is changing. Our **economics**, our **demographics** and our **politics** are all changing and these changes are both opportunities and challenges.” – Mark Wilson
Florida 2030 - Jacksonville Regional Rollout
Florida Chamber Foundation

50 Years of Securing Florida’s Future

Florida Leaders Securing Florida’s Future - What Are You Committing To?

Florida’s SIX PILLARS

- Global Competitiveness
- Prosperity & High Paying Jobs
- Vibrant & Resilient Communities

Global Competition
(17th to 10th)

Path to Prosperity
for every zip code in FL

Vibrant & Resilient Communities

How do we plan better for the next 5 million Floridians than we did for the last 5 million?

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Demographics

Known

- Talent Needs
- Training/Development
- Where/How Live

Unknown

- Economics
- Regulations
- Civility
- Politics
- Tribalism
- Transfer of Wealth
- Health Needs
- Lifestyle
- Amenity
- Transfer of Wealth
- Civility
- Politics
- Tribalism
- Health Needs
- Lifestyle
- Amenity

2016 to 2017 Population Changes

Top Counties:
1. Orange 27,016
2. Miami-Dade 25,376
3. Broward 20,628
4. Hillsborough 20,175
5. Palm Beach 19,951
6. Lee 17,295
7. Osceola 11,092
8. Polk 11,015
9. Duval 10,217
10. Manatee 9,682

Source: U.S. Census Bureau

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
2016 to 2017 Population Changes

17 Florida Counties Lost Population

Growth

Change in Population by Source, 2010-2017 (millions)

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Florida 2030 - Jacksonville Regional Rollout
Florida Chamber Foundation

Top 10 States: Net People Moving to Florida

- New York: 36,957
- New Jersey: 23,567
- Pennsylvania: 17,320
- Ohio: 14,568
- Connecticut: 10,656
- Illinois: 10,298
- Virginia: 10,046
- Massachusetts: 8,587
- Maryland: 6,761
- Wisconsin: 6,056

Income Migration
Wealth Migration from 1992 - 2016

Florida
- Gained Wealth From: New York
  - $27.89 billion
- Gained Wealth From: New Jersey
  - $18.29 billion
- Gained Wealth From: Pennsylvania
  - $12.89 billion
- Gained Wealth From: Connecticut
  - $10.93 billion
- Gained Wealth From: Illinois
  - $10.65 billion
- Lost Wealth To: North Carolina
  - $1.19 billion
- Lost Wealth To: Texas
  - $1.18 billion
- Lost Wealth To: Tennessee
  - $7.48 billion
- Lost Wealth To: South Carolina
  - $4.26 billion
- Lost Wealth To: Arizona
  - $4.21 billion

Duval
- Gained Wealth From: Fairfield County, CT
  - $35.59 million
- Gained Wealth From: Broward County, FL
  - $13.75 million
- Gained Wealth From: Miami-Dade County, FL
  - $10.04 million
- Gained Wealth From: Loudoun County, VA
  - $8.00 million
- Gained Wealth From: Alachua County, FL
  - $7.51 million
- Lost Wealth To: St. Johns County, FL
  - $1.42 billion
- Lost Wealth To: Clay County, FL
  - $4.94 billion
- Lost Wealth To: Nassau County, FL
  - $2.49 billion
- Lost Wealth To: Harris County, TX
  - $1.80 billion
- Lost Wealth To: Baker County, FL
  - $0.70 million

Putnam
- Gained Wealth From: Duval County, FL
  - $35.93 million
- Gained Wealth From: Broward County, FL
  - $15.03 million
- Gained Wealth From: Palm Beach County, FL
  - $14.78 million
- Gained Wealth From: Miami-Dade County, FL
  - $9.77 million
- Gained Wealth From: St. Johns County, FL
  - $6.19 million
- Lost Wealth To: Orange County, FL
  - $2.77 million
- Lost Wealth To: Flagler County, FL
  - $9.67 million
- Lost Wealth To: Volusia County, FL
  - $5.65 million
- Lost Wealth To: Marion County, FL
  - $4.90 million
- Lost Wealth To: Bradford County, FL
  - $4.40 million

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Florida's next 5 million People

8 Counties to account for 56.9% of Population Increase:

1. Miami-Dade
2. Orange
3. Hillsborough
4. Broward
5. Palm Beach
6. Lee
7. Duval
8. Osceola

Source: FL Demographic Estimating Conference & BEBR FL Population Studies
U.S. Growth Rate: 1.6%
Florida Growth Rate: 2.6%

Top Increases:
1. Orange   25,597
2. Hillsborough  13,602
3. Duval    12,440

Top Growth Rates:
1. Okaloosa  3.8%
2. Walton   3.6%
2. Orange   3.6%
2. Osceola   3.6%
2. Seminole   3.6%
2. Lake     3.6%

August 2017 through August 2018*
51 Counties Added Jobs
16 Lost Jobs

Source: Florida Department of Economic Opportunity

Diversity

Projected U.S. Population by Generation

Source: Pew Research Center tabulations of U.S. Census Bureau population projections
Florida 2030 - Jacksonville Regional Rollout
Florida Chamber Foundation

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org

New Voters Since 2010

<table>
<thead>
<tr>
<th>Statewide</th>
<th>4,574,839</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>2,084,543</td>
</tr>
<tr>
<td>Women</td>
<td>2,244,901</td>
</tr>
<tr>
<td>Republicans</td>
<td>1,297,712</td>
</tr>
<tr>
<td>Democrats</td>
<td>1,508,126</td>
</tr>
<tr>
<td>NPA/Others</td>
<td>1,769,001</td>
</tr>
<tr>
<td>White</td>
<td>2,601,405</td>
</tr>
<tr>
<td>Black</td>
<td>567,957</td>
</tr>
<tr>
<td>Hispanics</td>
<td>956,304</td>
</tr>
</tbody>
</table>

+ 2.4 Million Seniors
BUT
3 of 4 still < 65

Map Shaded by New Voters/Total Voters

1 in 2 new voters
1 in 3 new voters
1 in 4 new voters
1 in 5+ new voters
Technology Fueled Disruption Ahead

Known
- Globalization
- Automation
- Technology
- Economics
- Entrepreneurism
- Rule of Law
- Free Enterprise
- Property Rights
- Singularity
- Automation
- Investments
- Talent Needs
- Training/Development
- Resources
- Where/How Live

Unknown
- Regulations
- Nature of Work
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- ...
Nature of Work

Nature of Work

Source: Federal Reserve Bank of St. Louis analysis of Bureau of Labor Statistics occupational data

Nature of Work

Percent of Selected Jobs that Could be Automated Using Existing Technology

Florida Industry Diversification by MSA

#1 Most Diverse - Palm Bay-Melbourne-Titusville MSA
#2 Most Diverse – Miami-Ft. Lauderdale-West Palm Beach MSA
#3 Most Diverse – Jacksonville MSA
#4 Most Diverse – Orlando-Kissimmee-Sanford MSA
#5 Most Diverse – Naples-Immokalee-Marco Island MSA
#6 Most Diverse – Tampa-St. Petersburg-Clearwater MSA

Florida’s $1 Trillion GDP by Industry – Q1 2018 ($Billion)

Source: Federal Reserve (FRED) Data

For More Information:
Tony Carvajal, tcarvajal@ffoundation.org
Florida’s $1 Trillion GDP by Industry – Q1 2018 ($Billion)

- Real Estate and Rental and Leasing: $166.6 billion
- Government (Q3, 2017): $112.8 billion
- Health Care & Social Assistance: $84.5 billion
- Retail Trade: $75.1 billion
- Professional, Scientific, and Technical Services: $70.2 billion
- Wholesale Trade: $56.9 billion
- Finance and Insurance: $53.8 billion
- Construction: $53.4 billion
- Manufacturing: $43.2 billion
- Accommodation and Food Services: $41.4 billion
- Administrative and Waste Management Services: $37.6 billion
- Transportation and Warehousing: $32.8 billion
- Other Services (except Government): $27.3 billion
- Arts, Entertainment and Recreation: $18.4 billion
- Management of Companies and Enterprises: $9.1 billion
- Educational Services (Private): $6.3 billion
- Agriculture, Forestry, Fishing and Hunting: $3.6 billion
- Mining: $1.6 billion

Technical Potential for DISRUPTION
- Predictable Physical Work
- Data Processing
- Data Collection
- Stakeholder Interactions
- Managing Others
- Non-Place Based Analysis/Transactions

Source: Federal Reserve (FRED) Data

Global Markets

Projected Gross Domestic Product Growth by Region, 2016-2030


For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Global Markets


Source: UN World Tourism Organization, UN Conference on Trade and Development, World Bank, International Monetary Fund, TeleGeography, McKinsey Global Institute, Cambridge Systematics analysis

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Number of Households in Poverty by Zip Code (1,472/983)

“If you eliminated the poverty in just 21 of Florida’s 983 populated zip codes, you would eliminate 10% of all of Florida’s poverty”

Poverty is Concentrated:

<table>
<thead>
<tr>
<th>Households in Poverty</th>
<th>Zip Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>21</td>
</tr>
<tr>
<td>20%</td>
<td>52</td>
</tr>
<tr>
<td>30%</td>
<td>91</td>
</tr>
<tr>
<td>40%</td>
<td>138</td>
</tr>
<tr>
<td>50%</td>
<td>192</td>
</tr>
</tbody>
</table>

Kids in Poverty in Florida

Florida: 869,892 kids in poverty
21.3% Poverty Rate for Under-18 Year Olds

Source Data: American Community Survey, U.S. Census Bureau

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Households in Poverty by Zip Code  
Jacksonville Area

Top Number: Zip Code  
Bottom Number: Number of households with incomes below poverty line

Data Source: American Community Survey

Paths To Prosperity and Vibrant & Resilient Communities

ROOT CAUSES
- Jobs
- Education
- Housing
- Transportation
- Health
- Food Security
- Child & Family Care
- Safety
- Justice
- Agency

For More Information:  
Tony Carvajal, tcarvajal@flfoundation.org
#IsFLReady?

1. Plan
2. 3 Goals
3. 6 Pillars
4. 1 Steering Committee
5. 6 Advisory Committees
6. 155+ Partners & Leaders
7. 10,000+ Floridians engaged through 83 Town Halls covering 67 Counties

Strategic Thinking about Florida’s Future
How Florida CEDs see the state’s future shaping up

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Summary of Town Hall Findings, Statewide Analysis, 2016-17

Strength
- Public Safety
- Transportation
- Water Infrastructure
- Economic Development

Weakness
- Affordability of Housing
- Responsiveness of Govt

Getting Worse
- Arts, Culture, Heritage & Sense of Place
- Health & Wellness
- Talent
- Business Climate- Regulations
- Economic Prosperity

Improving
- Transportation
- Water Infrastructure
- Economic Development
- Responsiveness of Govt

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org

*Findings as of 11/2017
What issue was rated BEST/WORST?

- Affordability of Housing
- Arts, Culture, Heritage, Sense of Pace
- Business Climate - Regulations
- Economic Development
- Economic Prosperity
- Health & Wellness
- Public Safety
- Responsiveness of Government
- Talent Pipeline
- Transportation
- Water Infrastructure
Summary of Town Hall Findings, Regional Differences

<table>
<thead>
<tr>
<th>Strength</th>
<th>Weakness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Development</td>
<td>Affordability of Housing</td>
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<tr>
<td>Business Climate- Regulations</td>
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<tr>
<td>Economic Prosperity</td>
<td></td>
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<tr>
<td>Transportation</td>
<td></td>
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</tbody>
</table>

*Findings as of 11/2017

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Coordinates

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Talent is the key currency of the future
Competition for talent increasing and so is disruption
“Builders” of Tomorrow

- Cradle to Career, Learners to Earners
  Ready to Learn
  3rd Grade Reading
  Ready to Earn with pathways & critical skills
- Prepare for retraining, rigors & rate of change

Improving Florida’s talent pipeline for a better workforce

- Early Learning
- K-12
- Higher Education
- Workforce Training

Improving Florida’s Talent Pipeline For A Better Workforce

>80% of Florida’s workforce has essential employability skills

>60% of Floridians 25-64 have a high-value postsecondary certificate, degree, or training experience

95% of entering high school students graduate within 4 years

100% of Florida 8th graders read & perform math at or above grade level

100% of Florida 3rd graders read at or above grade level

100% of children are ready for kindergarten

1.7 million net new jobs needed by 2030 to accommodate growth and maintain unemployment at current levels

(Florida Chamber Foundation 2018 projection)
Improving Florida’s Talent Pipeline For A Better Workforce

TheFloridaScorecard.org

Creating Good Jobs by Diversifying Florida’s Economy

- Florida’s Economic Portfolio
- Innovation Economy
- Entrepreneurism
- Capital & Investments
- Global Trade

For More Information:
Tony Carvajal, tcarvajal@fffoundation.org
Creating Good Jobs by Diversifying Florida’s Economy

TheFloridaScorecard.org

Preparing Florida’s Infrastructure for Smart Growth and Development

- Planning, Development & Housing
- Transportation and Logistics
- Energy
- Communications
- Water
- Waste Management
- Environmental Issues
- Risk Preparedness & Mitigation

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Preparing Florida’s Infrastructure for Smart Growth & Development

Diverse, attainable housing to meet future demand
Every resident has access to public and private mobility services
All major population and economic centers connected to regional, national, and global markets by high-capacity corridors
World’s most capable spaceport, top-tier airports, seaports, and surface transportation hubs in U.S.
100% of Florida residents have access to high-speed communications connectivity
Diverse and reliable energy, water, and waste management resources to meet future demand
All Florida residents protected by resiliency plans

Building the Perfect Climate for Business

- Taxes
- Regulation
- Legal Reform
- Permitting
- Property Rights
- Workplace & Employment Issues
- Insurance

Responsiveness & Competitiveness
Predictability & Reliability
Global Signals

- Tax & Regulatory Costs
- Property Rights
- Managing Risks
- Legal Climate

For More Information:
Tony Carvajal, tcarvajal@fffoundation.org
Building the Perfect Climate For Business

TheFloridaScorecard.org

Made Government and Civics More Efficient and Effective

- Florida's Budget
- Government Systems
- Federal Issues
- Local Government Issues
- Regional Stewardship
- Public/Private Partnerships
- Ethics & Elections
- Florida's Constitution
- Civic Infrastructure
Making Government & Civics More Efficient & Effective

- 100% of state agencies aligned with Florida 2030 goals
- 100% of regional economic development plans aligned with Florida 2030 goals
- 100% of Florida residents covered by regional visioning processes
- Increased size and impact of nonprofit and philanthropic sectors
- Doubling the rate of Floridians who volunteer and participate in civic and public service, moving us from the bottom to the top quartile

Making Government & Civics More Efficient & Effective

- 100% of state agencies aligned with Florida 2030 goals
- 100% of regional economic development plans aligned with Florida 2030 goals
- 100% of Florida residents covered by regional visioning processes
- Increased size and impact of nonprofit and philanthropic sectors
- Doubling the rate of Floridians who volunteer and participate in civic and public service, moving us from the bottom to the top quartile
Championing Florida’s Quality of Life

- Health & Wellness
- Retirement & Lifelong Engagement
- Safety & Security
- Housing & Livability
- Families & Children
- Retirement & Lifelong Engagement
- Economic Opportunity & Prosperity
- Sense of Place & Community
- Opposing Gambling Expansion

Florida ranks 12th in the nation for overall wellbeing including ranking 1st for social wellbeing & 4th for purpose (Gallup-ShareCare Wellbeing Index, 2017)

Top 5 state for overall well being
Florida’s brand and reputation as best place to live, work, raise a family, visit, learn, play, relocate, and compete remains top in the nation

<10% of Florida children live in poverty and 100% have a pathway out

<10% of Florida residents live in housing-cost burdened households

Crime rates rank among the lowest 10 states

Florida protects and enhances the value of its arts, culture, heritage, and sense of place

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Championing Florida’s Quality of Life & Quality Places

“As we move toward 2030, it is now more important than ever for Florida's leaders in industry, business, nonprofits and government to collaborate, and to work together toward a brighter future.”

Doug Davidson
Market Executive, Bank of America
Chair, Florida Chamber Foundation

Top 5 state for overall well being
Florida’s brand and reputation as best place to live, work, raise a family, visit, learn, play, relocate, and compete remains top in the nation

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Florida protects and enhances the value of its arts, culture, heritage, and sense of place

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
What Do YOU Think?

Opportunities?

Barriers?

What is Underway?

For More Information:
Tony Carvajal, tcarvajal@ffoundation.org