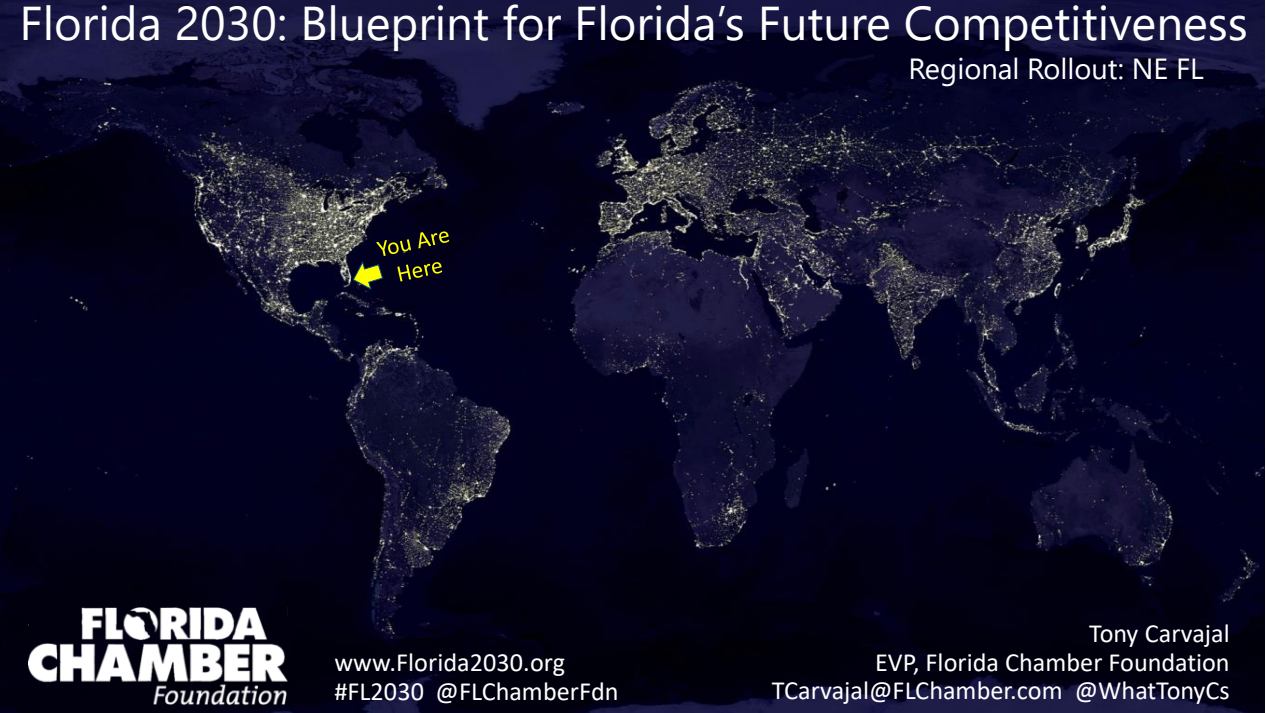


# Florida 2030: Blueprint for Florida's Future Competitiveness

Regional Rollout: NE FL



**FLORIDA CHAMBER**  
Foundation

[www.Florida2030.org](http://www.Florida2030.org)  
#FL2030 @FLChamberFdn

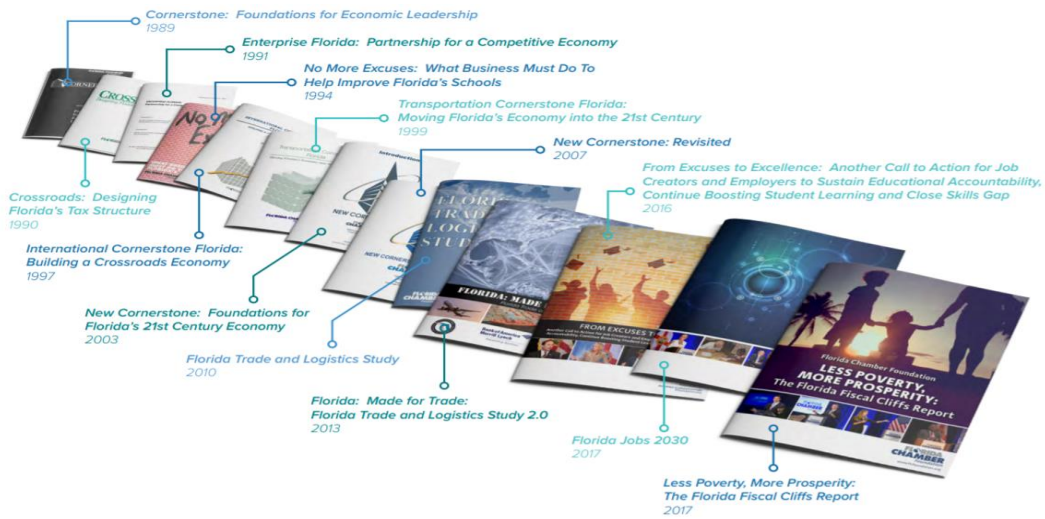
Tony Carvajal  
EVP, Florida Chamber Foundation  
[TCarvajal@FLChamber.com](mailto:TCarvajal@FLChamber.com) @WhatTonyCs

“Florida is changing. Our **economics**, our **demographics** and our **politics** are all changing and these changes are both opportunities and challenges.” – Mark Wilson

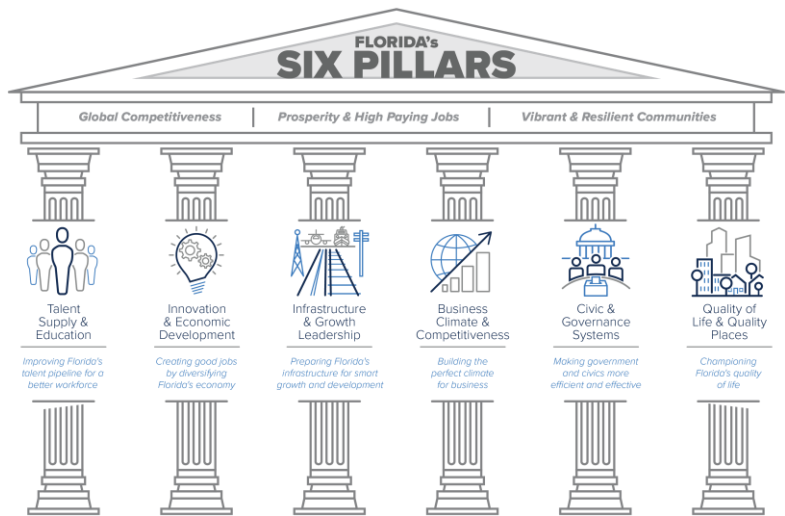


FLORIDA METRICS			
UNEMPLOYMENT RATE	UNEMPLOYMENT RATE	PER CAPITA INCOME	PER CAPITA INCOME
4.7%	88.2	\$49.1	6,255
259,800	106.0	24,083	
2,378	\$805K	16.6%	77.8%

# 50 Years of Securing Florida's Future



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



Global Competition  
(17<sup>th</sup> to 10<sup>th</sup>)

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?



SPECIAL THANKS TO OUR FLORIDA 2030 PARTNERS

PILLAR LEADERSHIP PARTNERS







SUSTAINING PILLAR PARTNERS







ANNUAL PILLAR PARTNERS







www.Florida2030.org



HOW WILL FLORIDA  
WORK IN 2030?



Global Markets



Innovation



Future of Work

Resources



Risk and Resiliency



HOW WILL FLORIDA  
LIVE IN 2030?



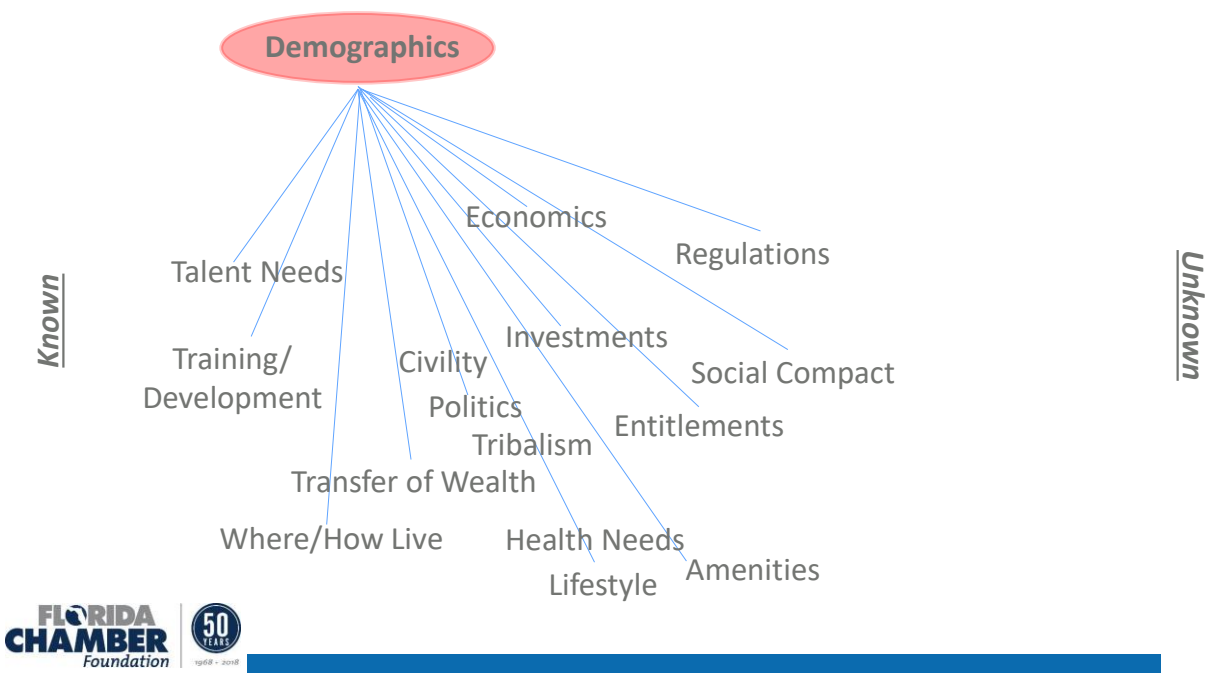
Growth



Diversity



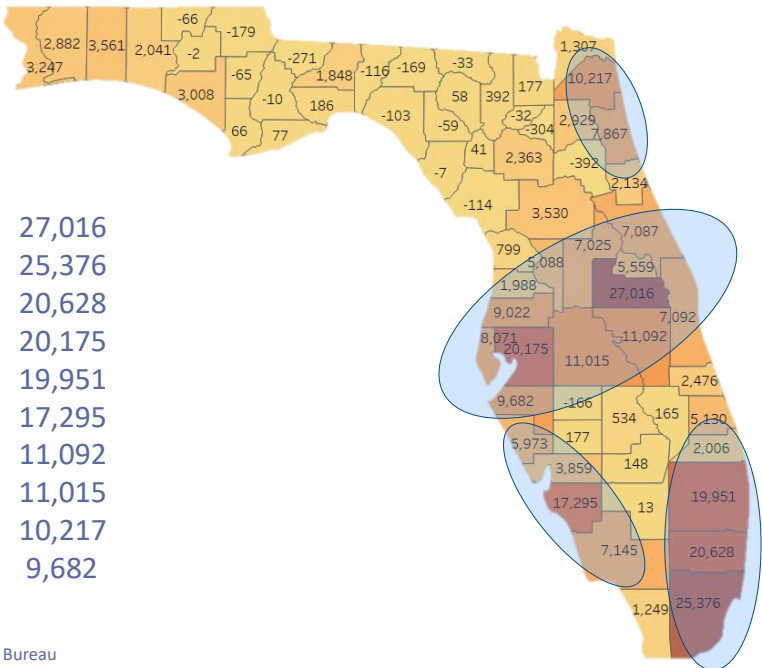
Urbanization



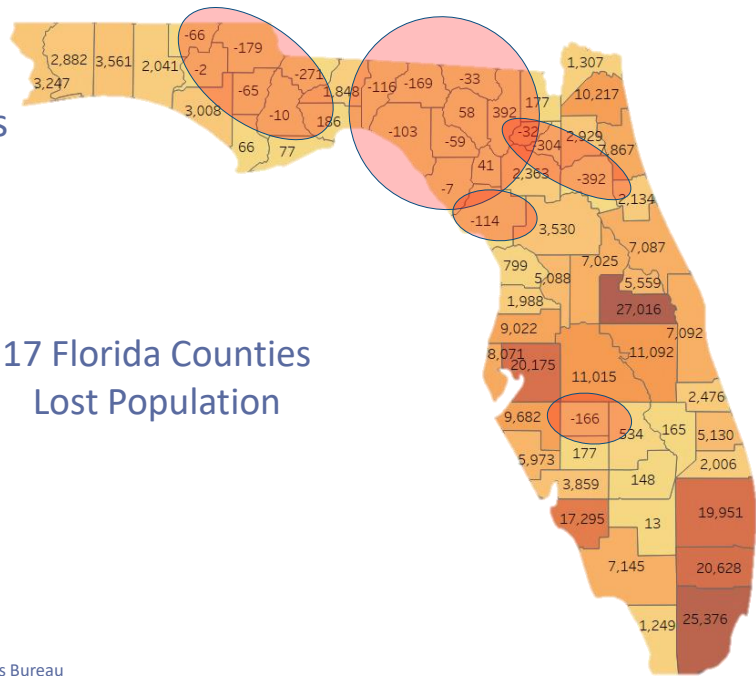
2016 to 2017  
Population Changes

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



2016 to 2017  
Population Changes

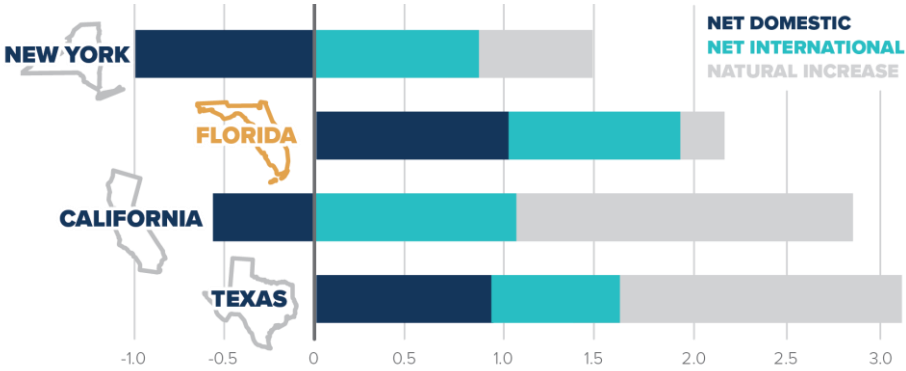


17 Florida Counties  
Lost Population



Source: U.S. Census Bureau

Growth

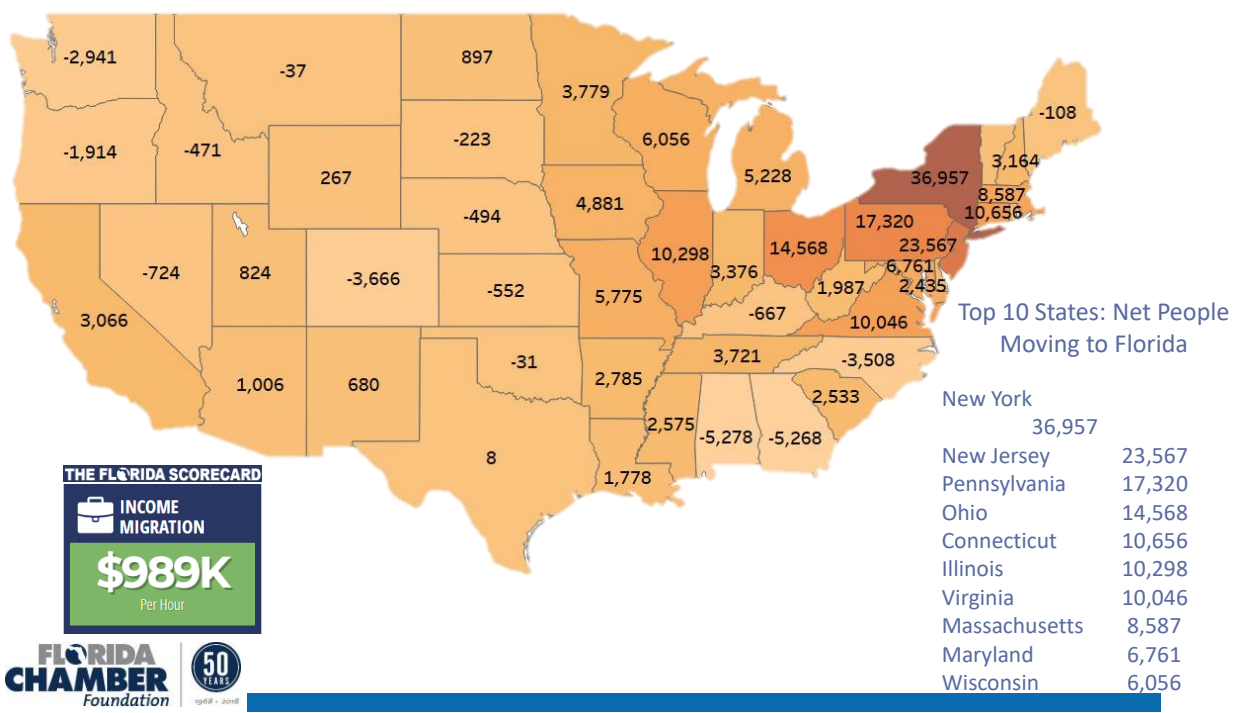


Change in Population by Source, 2010-2017 (millions)



Source: U.S. Census Bureau





# Income Migration

Wealth Migration from 1992 - 2016

**Florida**

**INCOME MIGRATION**

**\$879K**  
Per Hour

**Gained Wealth From:**

- \$27.89 billion New York
- \$18.29 billion New Jersey
- \$12.89 billion Illinois
- \$10.93 billion Pennsylvania
- \$10.65 billion Connecticut

**Lost Wealth To:**

- \$1.19 billion North Carolina
- \$1.18 billion Texas
- \$748.39 million Tennessee
- \$426.29 million South Carolina
- \$421.30 million Arizona

**Duval**

**WEALTH MIGRATION**

**\$38.08**  
Million per Year

**Gained Wealth From:**

- \$355.59 million Fairfield County, CT
- \$130.75 million Broward County, FL
- \$104.02 million Miami-Dade County, FL
- \$88.00 million Loudoun County, VA
- \$77.51 million Alachua County, FL

**Lost Wealth To:**

- \$1.42 billion St. Johns County, FL
- \$494.02 million Clay County, FL
- \$249.68 million Nassau County, FL
- \$98.90 million Harris County, TX
- \$70.18 million Baker County, FL

**Putnam**

**WEALTH MIGRATION**

**\$8.12**  
Million per Year

**Gained Wealth From:**

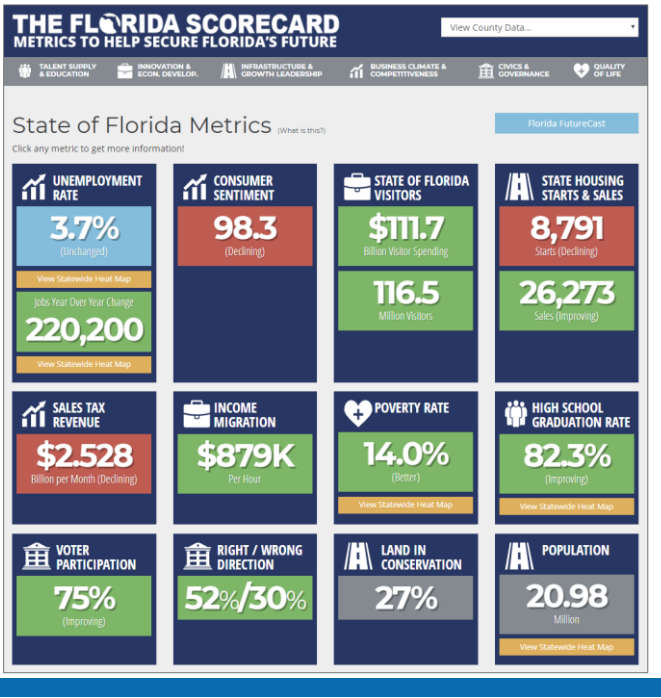
- \$35.93 million Duval County, FL
- \$15.03 million Broward County, FL
- \$14.78 million Palm Beach County, FL
- \$9.77 million Miami-Dade County, FL
- \$6.19 million St. Johns County, FL

**Lost Wealth To:**

- \$21.77 million Orange County, FL
- \$9.67 million Flagler County, FL
- \$5.65 million Volusia County, FL
- \$4.90 million Marion County, FL
- \$4.40 million Bradford County, FL

www.theFloridaScorecard.org

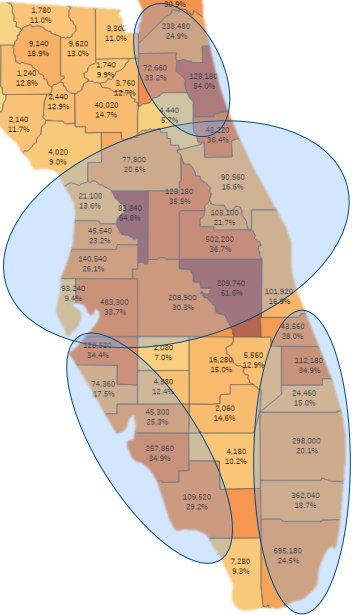
- Downloadable charts
- Data is downloadable
- Links to data sources
- Free to use



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:

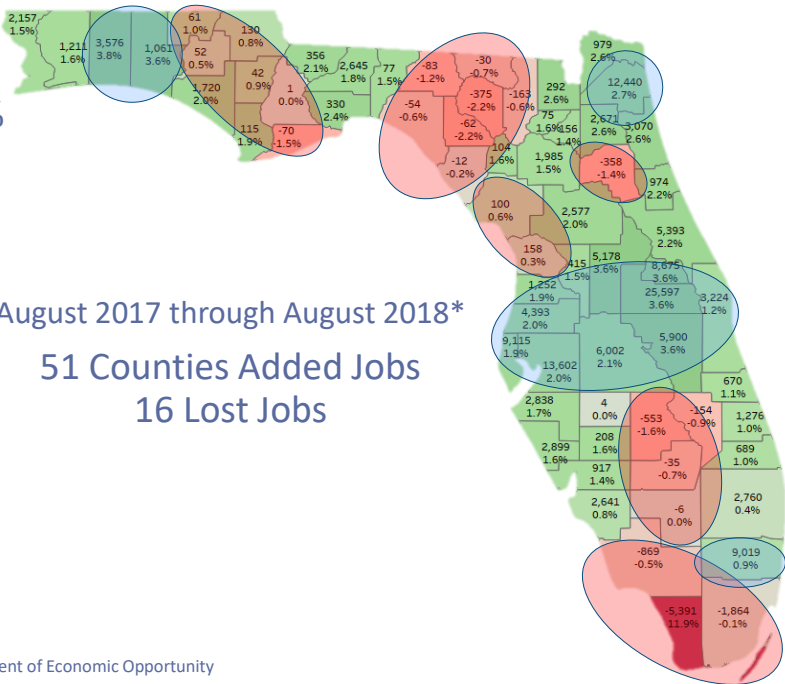
- 1. Orange 25,597
- 2. Hillsborough 13,602
- 3. Duval 12,440

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%

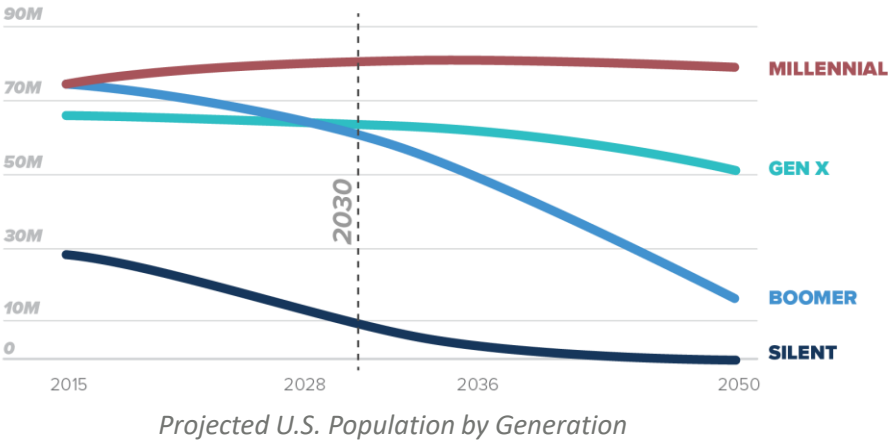
August 2017 through August 2018\*

51 Counties Added Jobs  
16 Lost Jobs



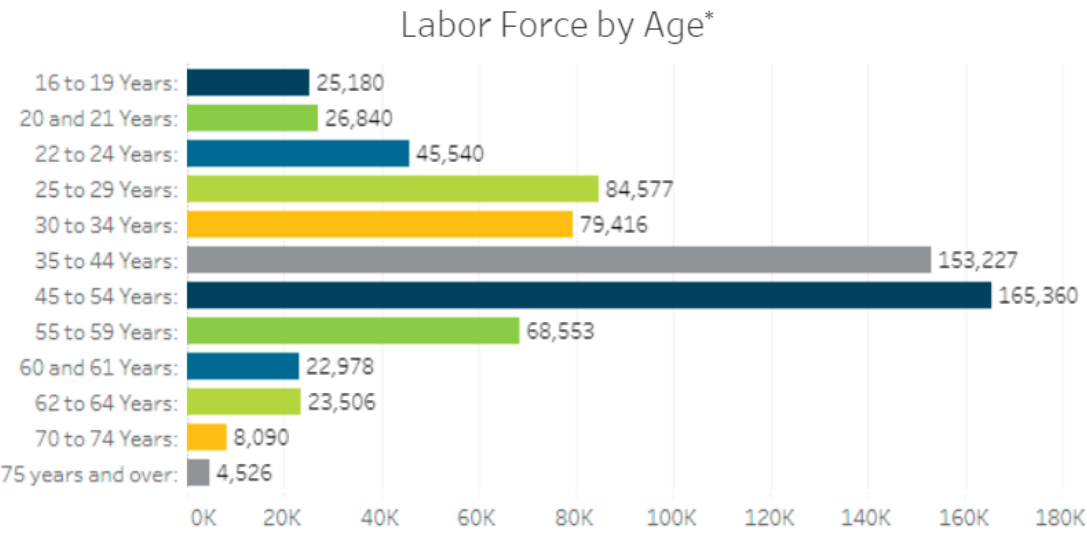
Source: Florida Department of Economic Opportunity

Diversity



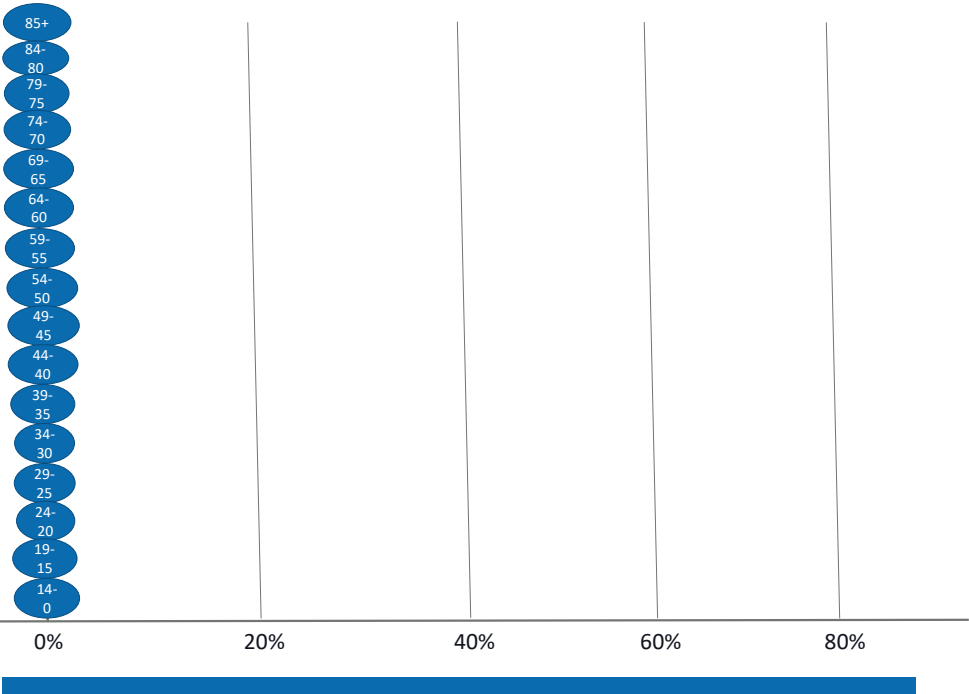
Source: Pew Research Center tabulations of U.S. Census Bureau population projections

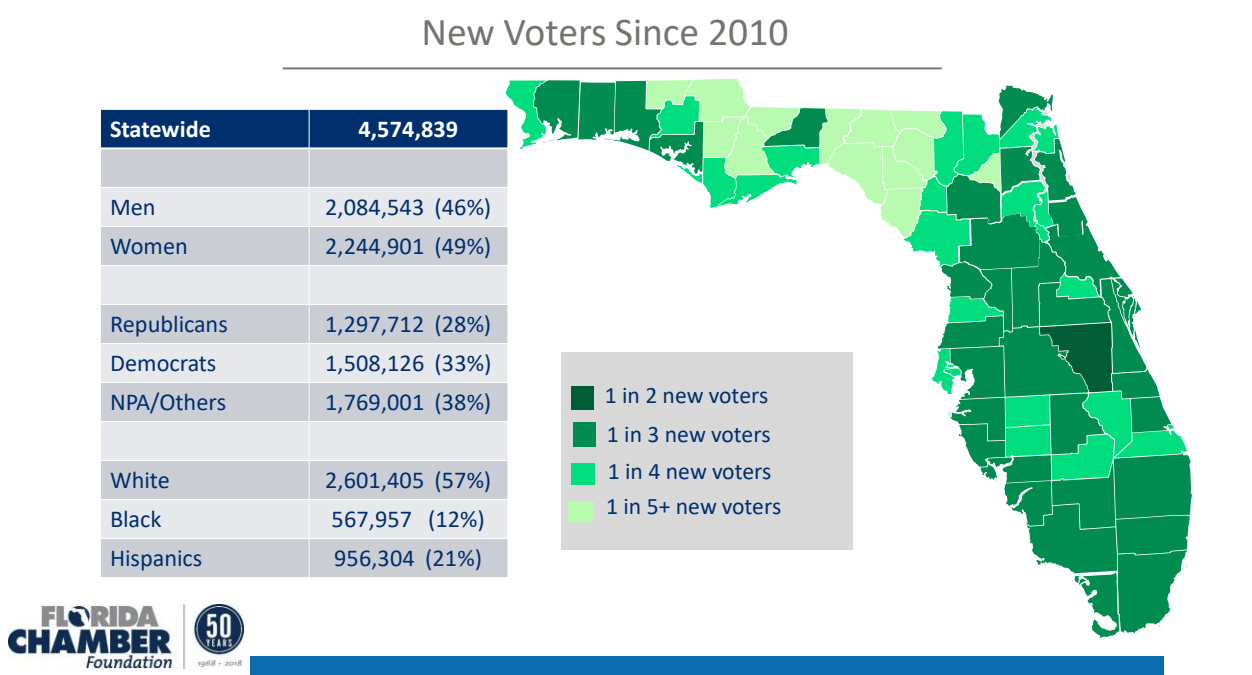
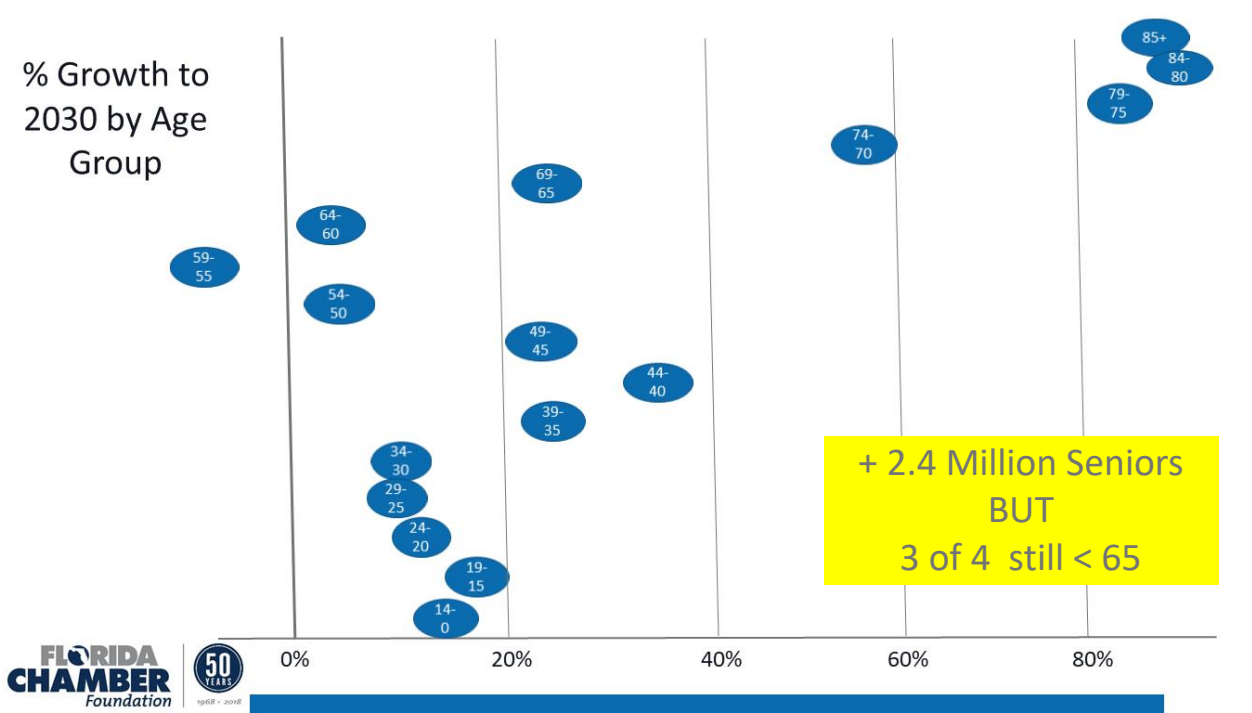




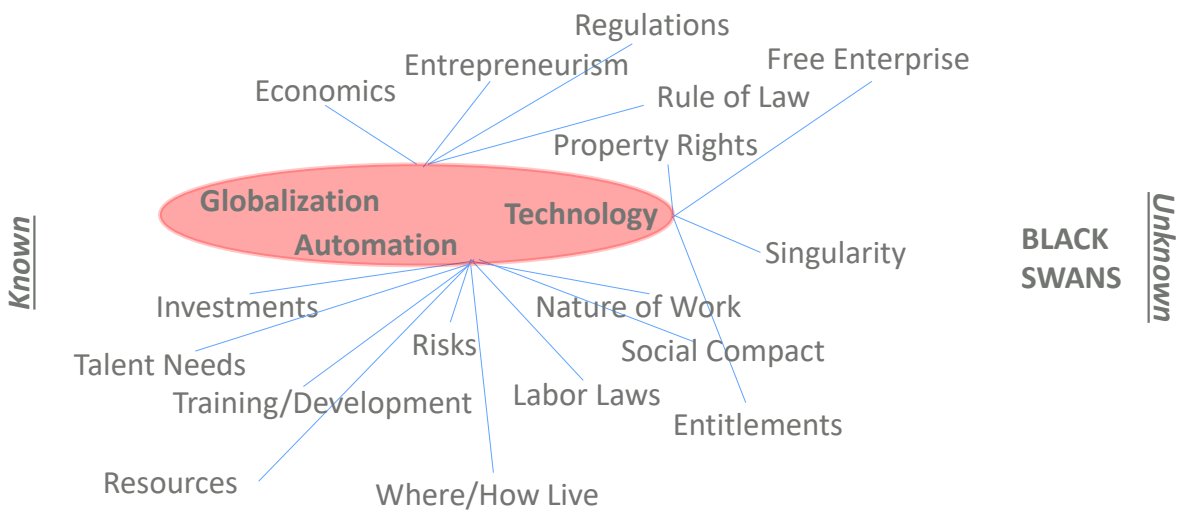
Source: [http://lmsresources.labormarketinfo.com/labor\\_supply/index.html](http://lmsresources.labormarketinfo.com/labor_supply/index.html) \*CareerSource NE FL Region 8

% Growth to 2030 by Age Group

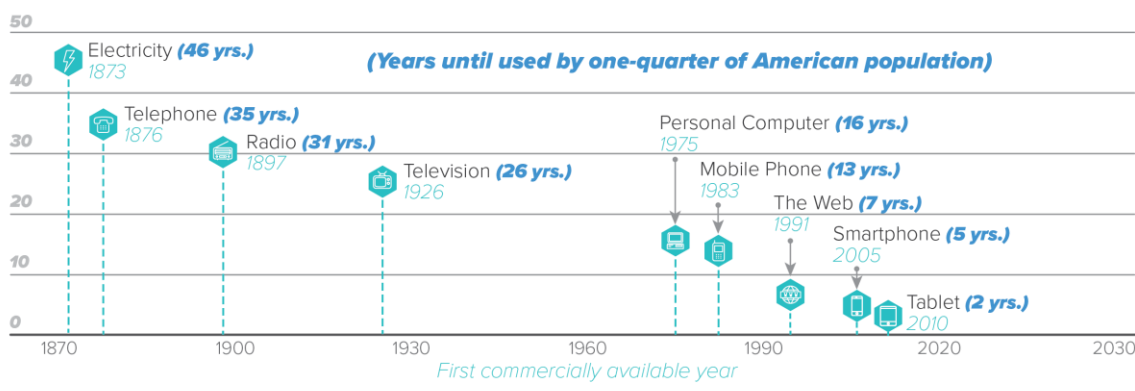




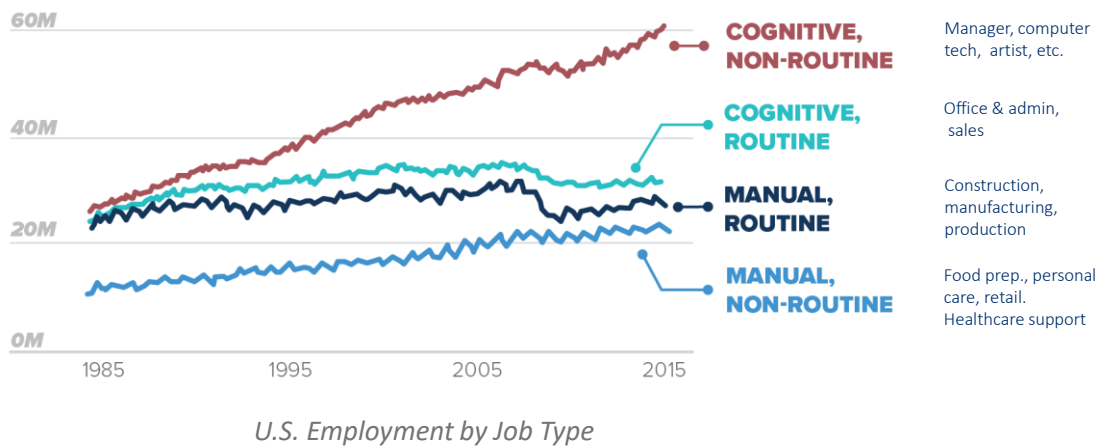
Technology Fueled Disruption Ahead



Innovation

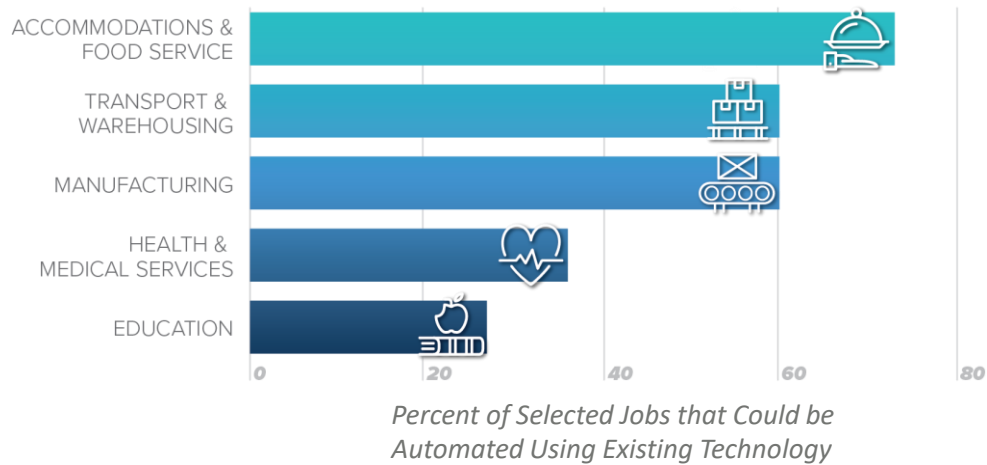


Nature of Work

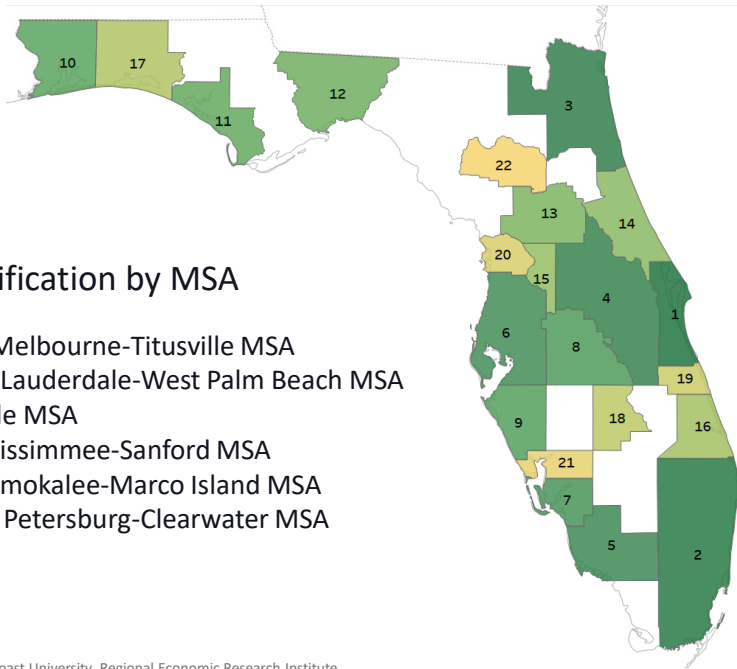


Source: Federal Reserve Bank of St. Louis analysis of Bureau of Labor Statistics occupational data

Nature of Work



Source: McKinsey Global Institute, 2017.



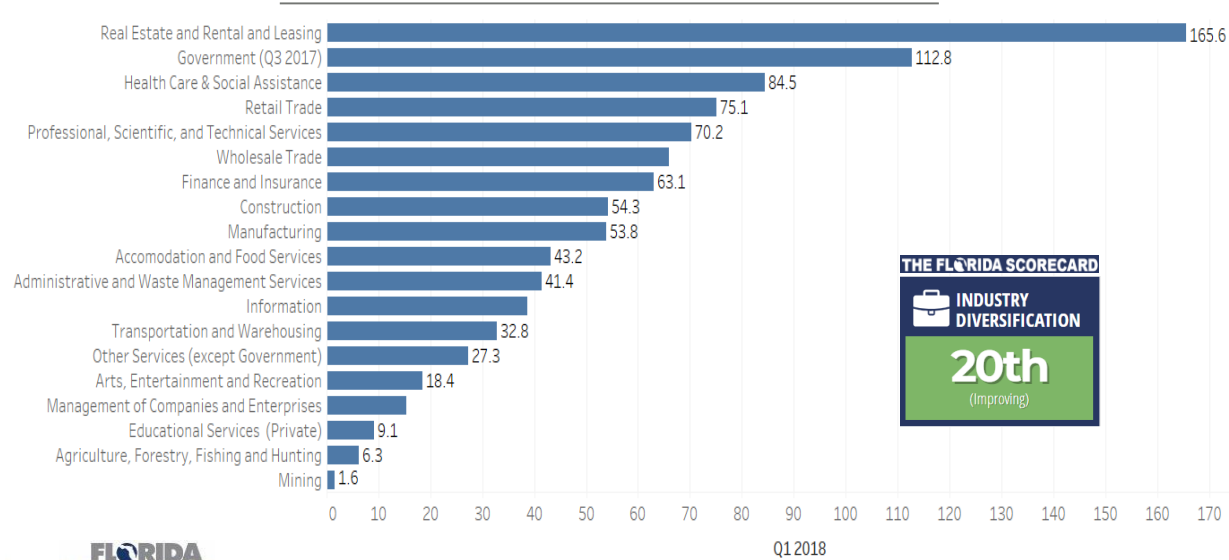
Florida Industry Diversification by MSA

- #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



Source: Florida Gulf Coast University, Regional Economic Research Institute

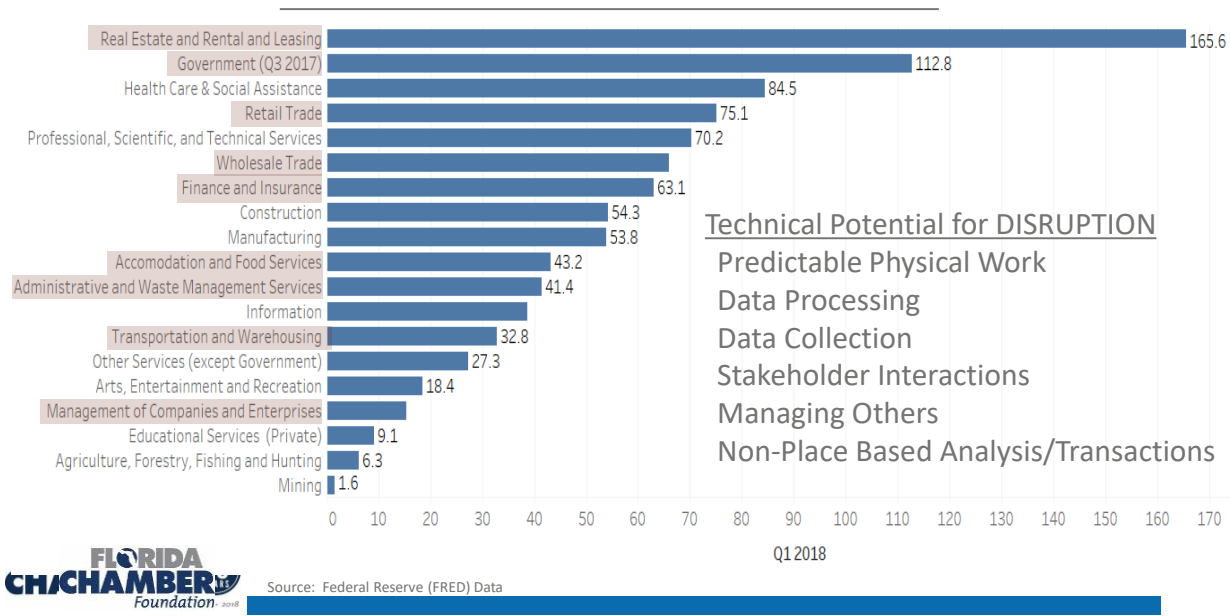
Florida’s \$1 Trillion GDP by Industry – Q1 2018 (\$Billion)



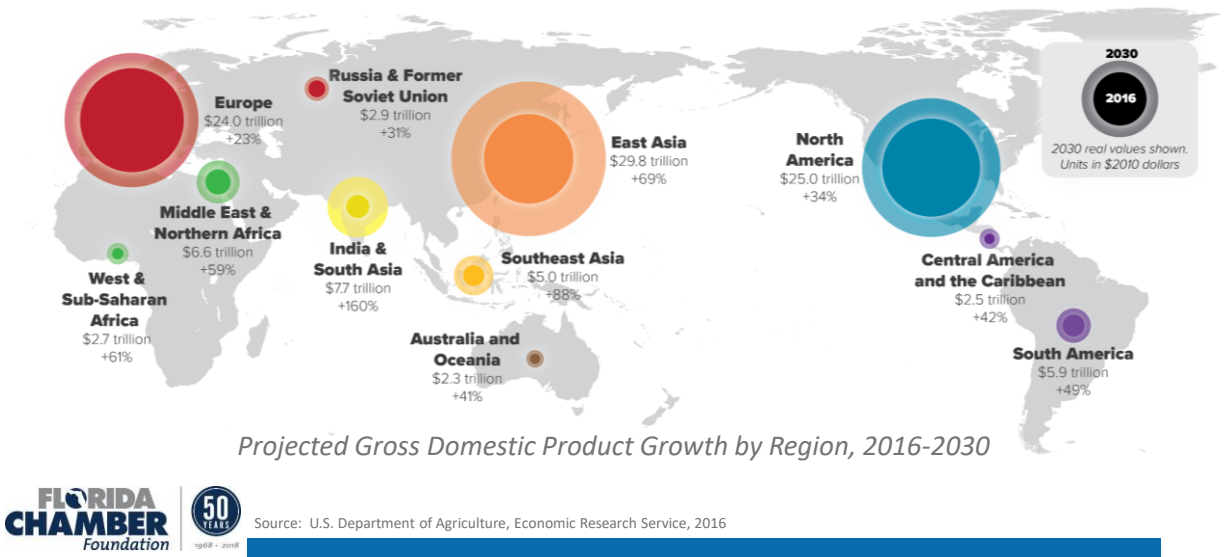
Source: Federal Reserve (FRED) Data

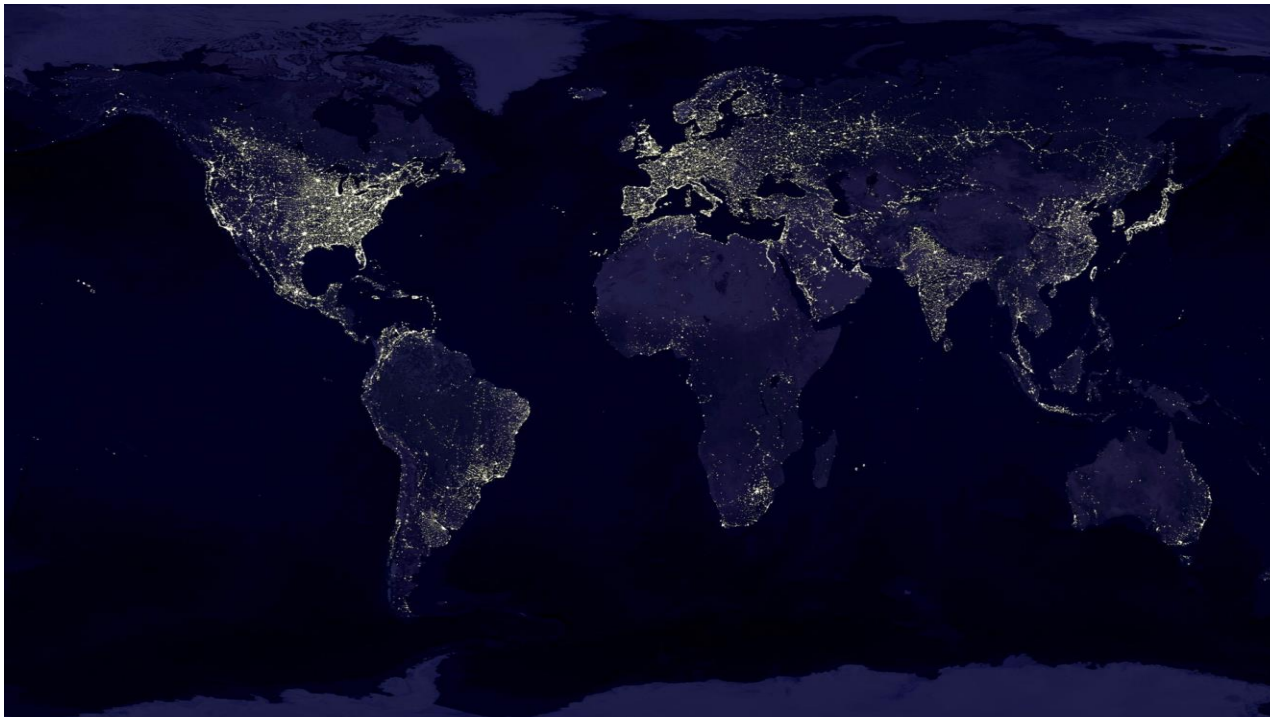


Florida’s \$1 Trillion GDP by Industry – Q1 2018 (\$Billion)

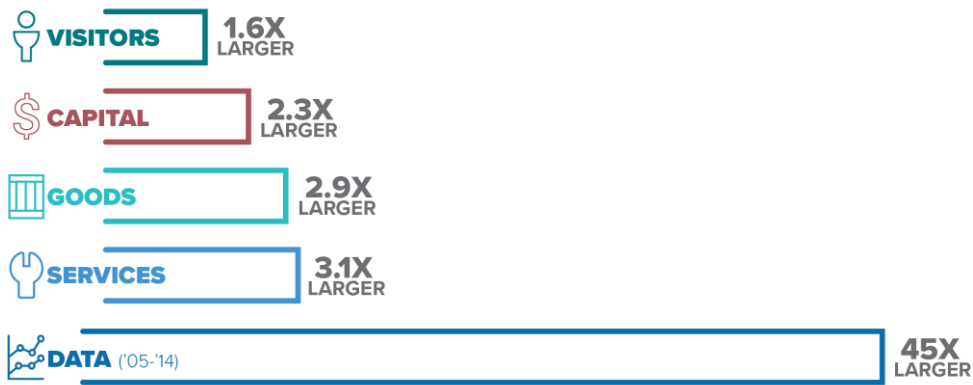


Global Markets



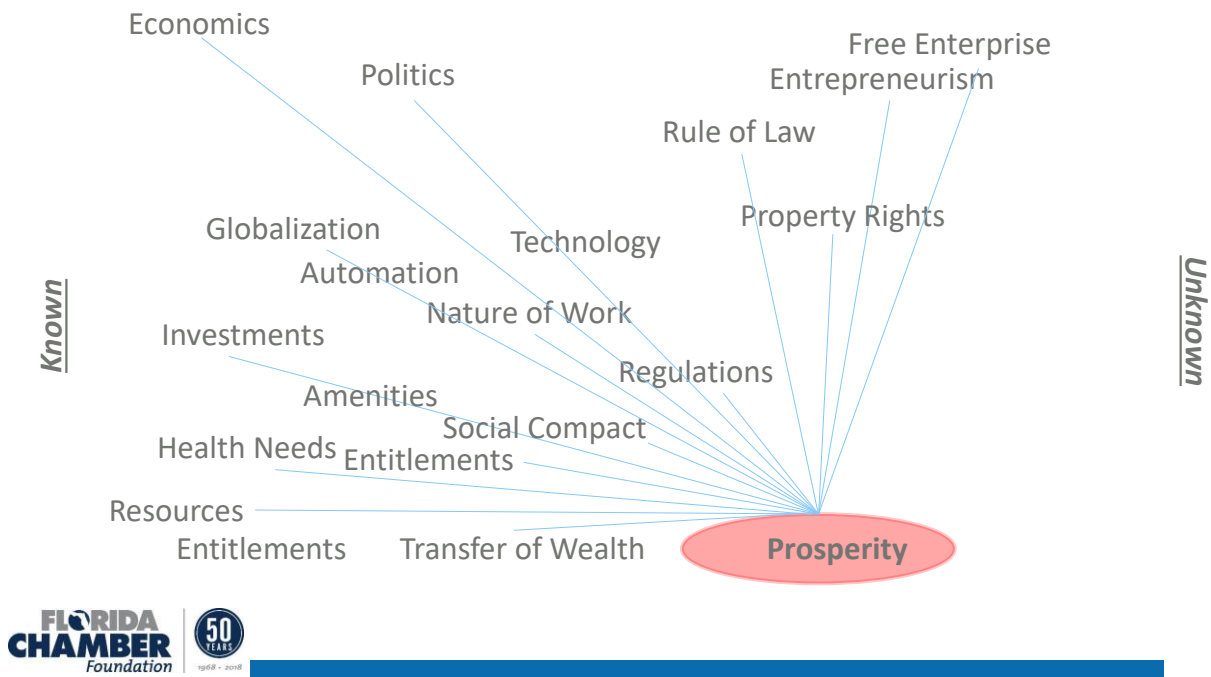
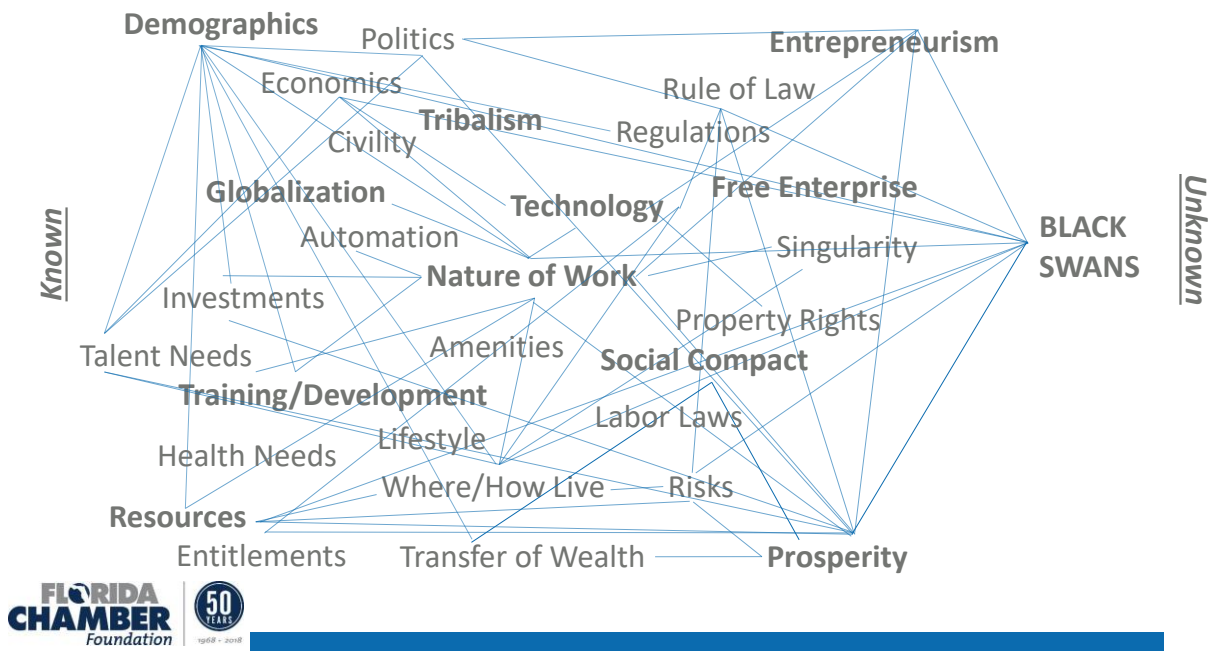


Global Markets



Global Growth in Cross-Border Flows, 2002-2014

Web of Collisions

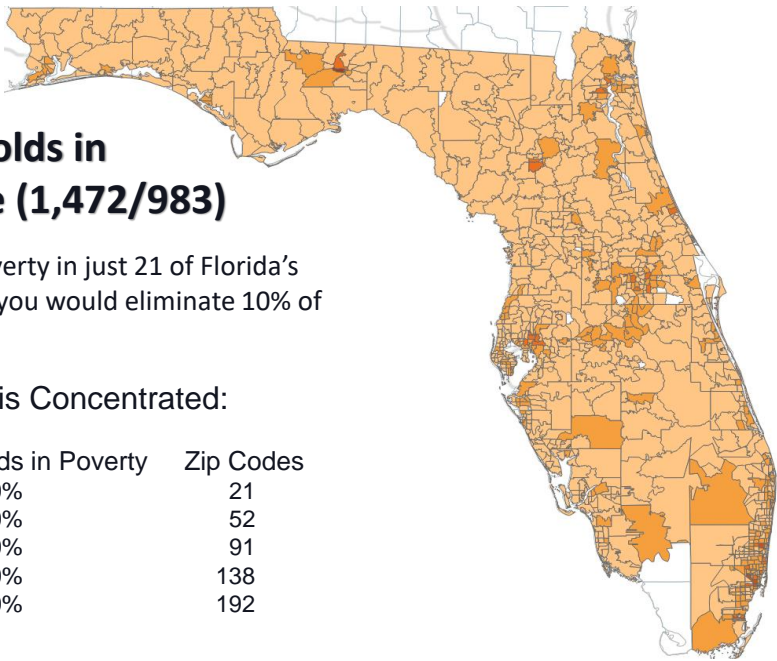


## Number of Households in Poverty by Zip Code (1,472/983)

“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”

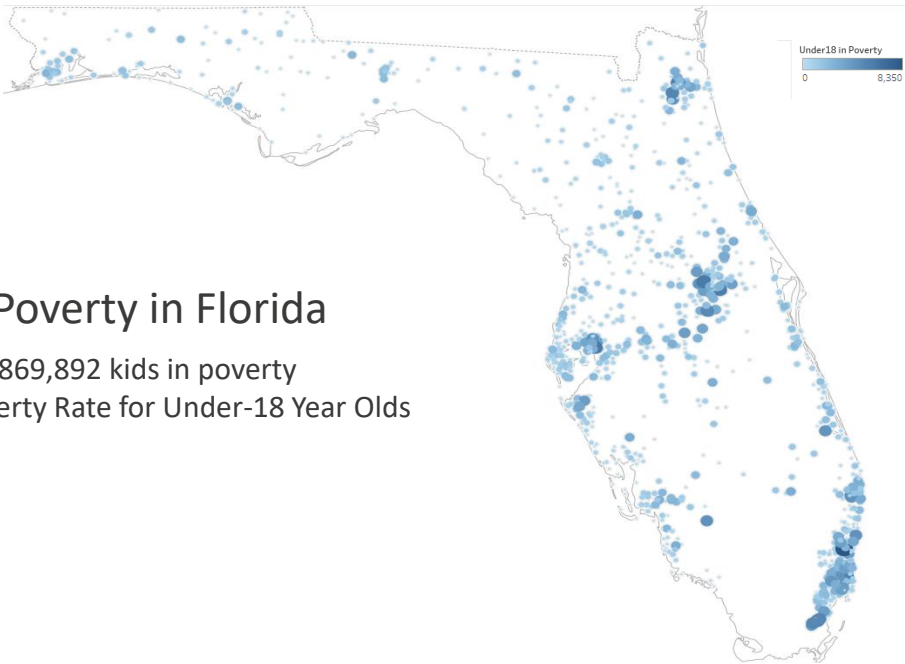
### Poverty is Concentrated:

Households in Poverty	Zip Codes
10%	21
20%	52
30%	91
40%	138
50%	192



## Kids in Poverty in Florida

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

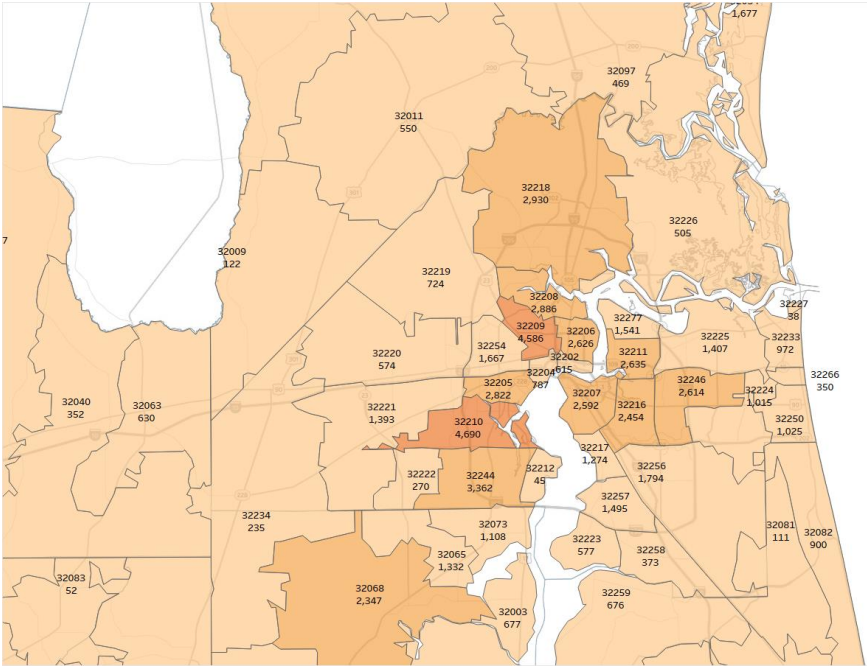


Source Data: American Community Survey, U.S. Census Bureau

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



[www.FloridaChamber.com/ProsperityInitiative](http://www.FloridaChamber.com/ProsperityInitiative)








**1 PLAN  
3 GOALS  
6 PILLARS**  
for Florida 2030



**1 STEERING COMMITTEE  
6 ADVISORY COMMITTEES  
155+ PARTNERS & LEADERS**  
weighing in on Florida's future




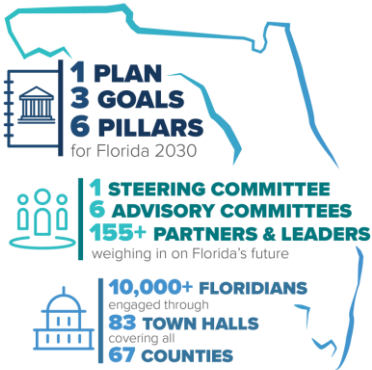
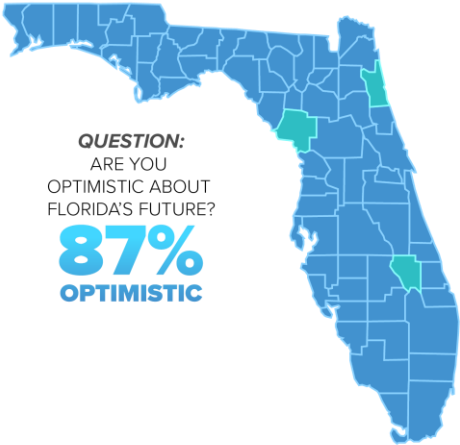
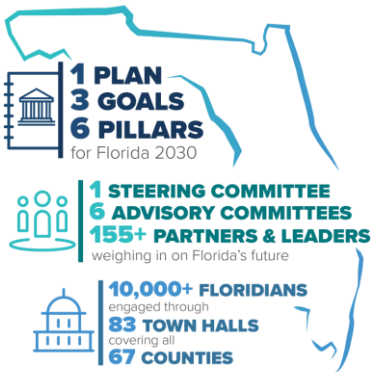
**10,000+ FLORIDIANS**  
engaged through  
**83 TOWN HALLS**  
covering all  
**67 COUNTIES**

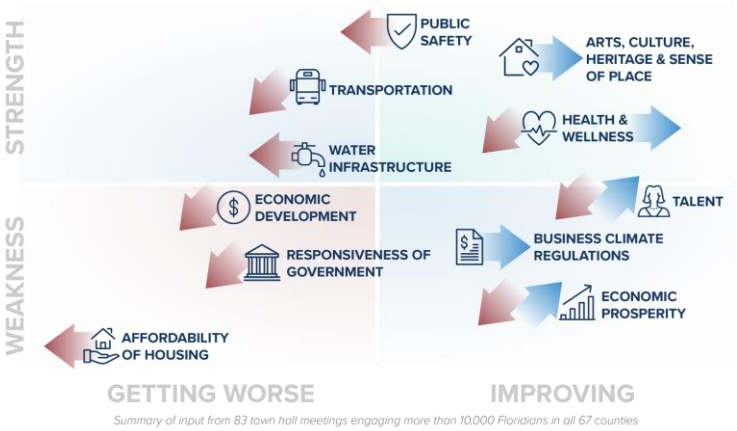


**Strategic Thinking about Florida's Future**  
How Florida CEOs see the state's future shaping up.

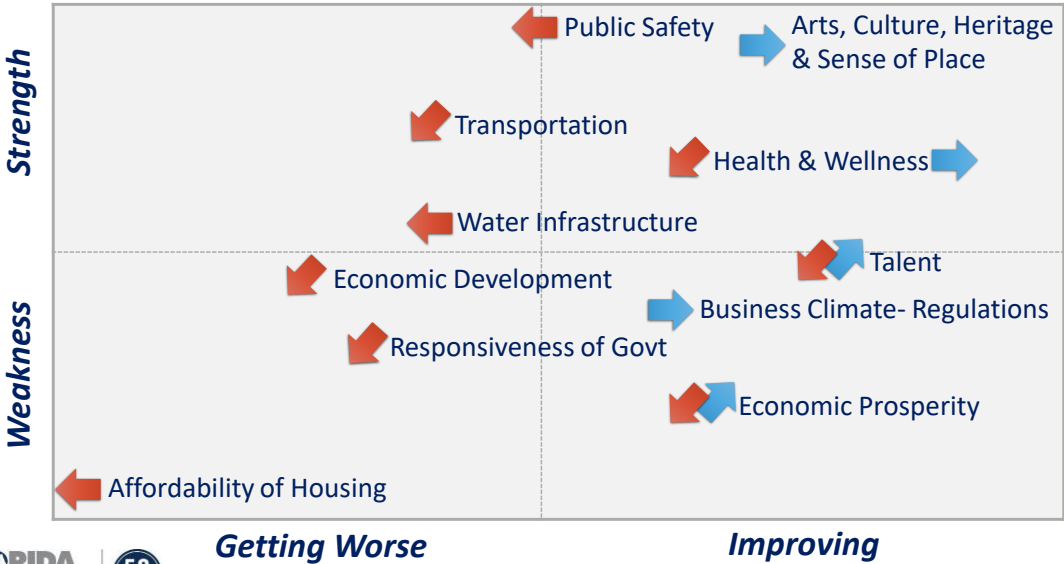
**Planning for Connectivity**  
Moving forward for a state with a transportation crisis...  
**Know It About**  
Florida's transportation infrastructure is a critical piece of the state's future...  
**Talent is Key**  
Florida's talent pipeline is a critical piece of the state's future...  
**Fostering a Unique Quality of Life**  
Florida's quality of life is a critical piece of the state's future...  
**Notes for Our Next Governor**  
Florida's next governor will face a state with a unique set of challenges...



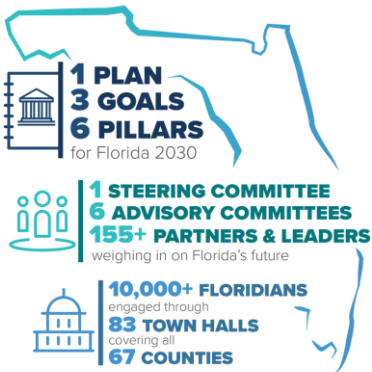




Summary of Town Hall Findings, Statewide Analysis, 2016-17



\*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

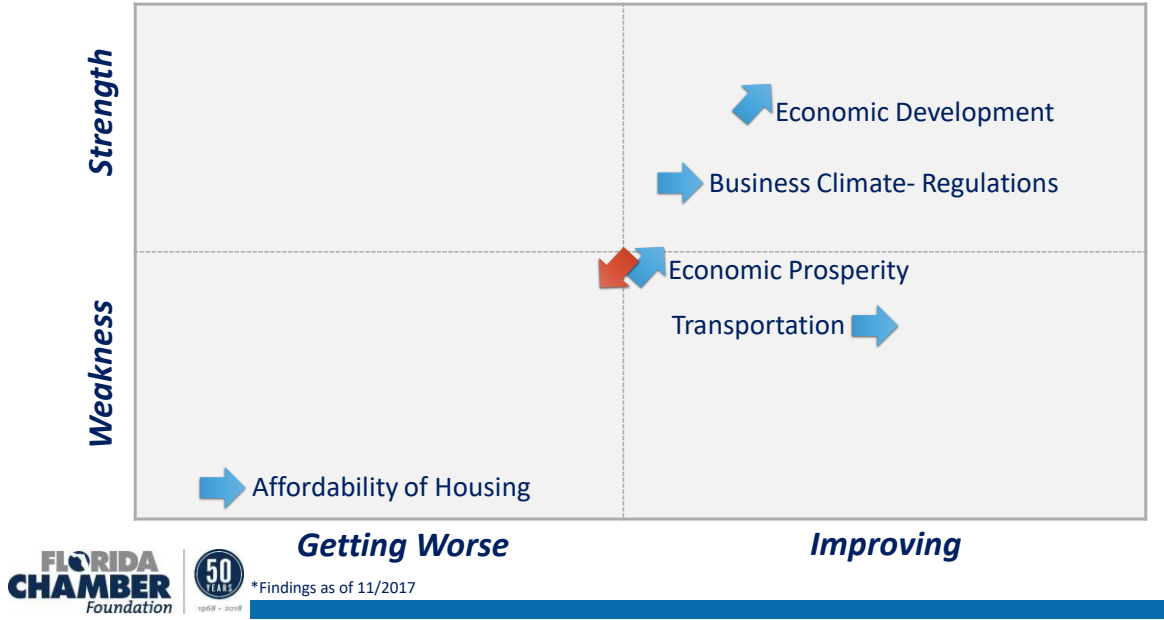


## What issue was rated BEST/WORST?

- 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



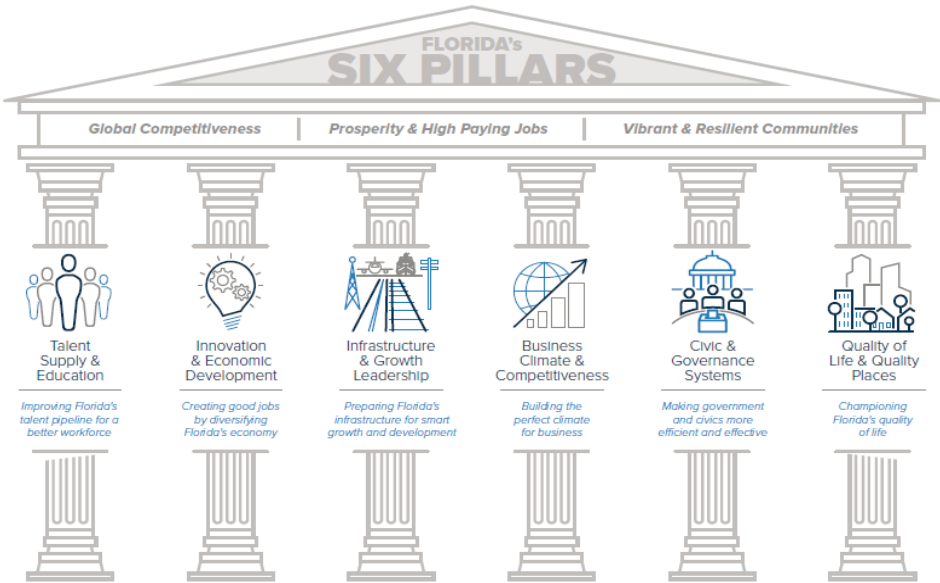


Coordinates



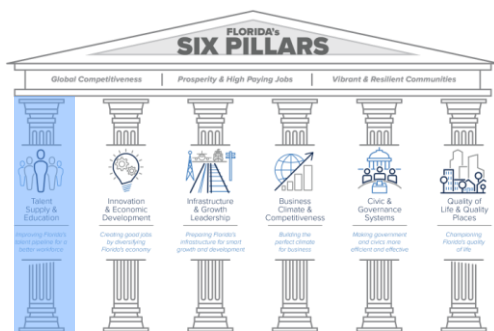
Help secure Florida's future at  
[Florida2030.org](http://Florida2030.org)

Track Florida's progress at  
[TheFloridaScorecard.org](http://TheFloridaScorecard.org)



Help secure Florida's future at  
[Florida2030.org](http://Florida2030.org)

Track Florida's progress at  
[TheFloridaScorecard.org](http://TheFloridaScorecard.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
  - 3<sup>rd</sup> 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

**1.7 million**  
**net new jobs**  
needed by **2030**  
to accommodate growth and maintain  
unemployment at current levels  
(Florida Chamber Foundation 2018 projection)

**>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**

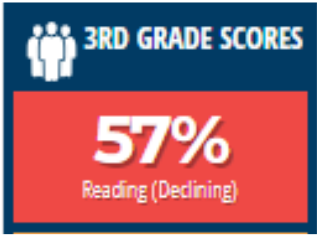
**100%** of Florida **8th graders**  
**read & perform math at or above**  
**grade level**

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

**100%** of children are  
**ready for kindergarten**



# Improving Florida’s Talent Pipeline For A Better Workforce



TheFloridaScorecard.org

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

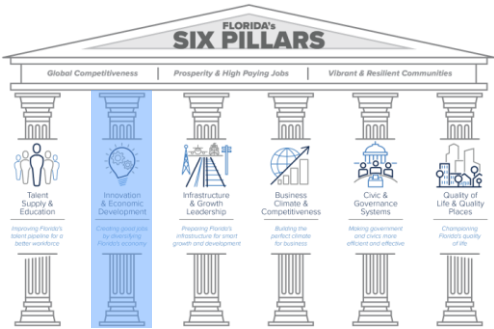
>60% of Floridians 25-64 have a high-value **postsecondary certificate, degree, or training experience**

**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**



Continue to Diversify & Drive to New Economy  
“Signals” to Capital, Job Creators & Talent

- Retain, Recruit, Grow and Cluster
- Leverage Strengths & Invest in New Ones
- **Make, Move & Multiply** Impacts
- Research, Develop, Commercialize
- Collaborate @ **Speed of Opportunity**



## Creating Good Jobs by Diversifying Florida’s Economy

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

## Creating Good Jobs by Diversifying Florida's Economy



TheFloridaScorecard.org

**Top** state for **gross domestic product** and **top quartile** most diversified state economy

**#1** state for **overseas visitors**

**Goods** exports **double** and **services** exports **triple**

**Top 5** state for **manufacturing jobs**

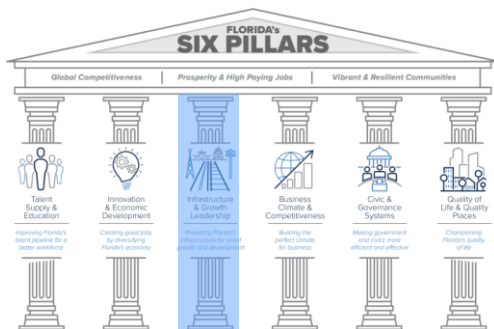
**Top 3** state for **technology jobs**

**#1** state for **business startups**

**Top 3** state for **venture capital investments**

**Top 3** state for **research and development funding** and **patents issued**

**Rural county** share of Florida gross domestic product **doubles**



Position for Growth & Opportunities  
Best Place to **Live, Work, Learn, Raise Family, Play, and Compete**

- Emphasize **“Connectivity”**
- Sustain and Grow our **Supporting Systems**
- Resiliency

## 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



# Preparing Florida’s Infrastructure for Smart Growth & Development



TheFloridaScorecard.org

**Diverse, attainable housing**  
to meet future demand

Every resident has access to **public and private mobility services**

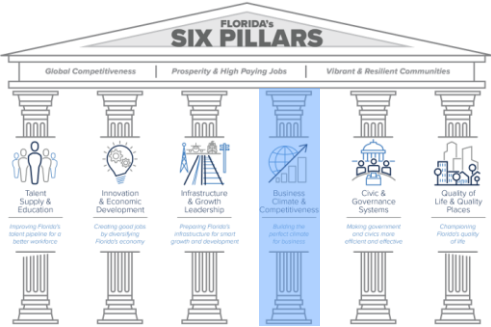
**All major population and economic centers connected** to regional, national, and global markets by **high-capacity corridors**

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**



Responsiveness & Competitiveness  
Predictability & Reliability  
Global Signals

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

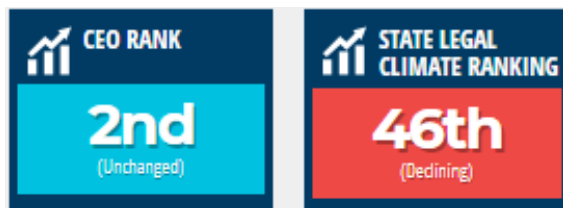
## Building the Perfect Climate for Business

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





## Building the Perfect Climate For Business



TheFloridaScorecard.org



Actuarially sound **property insurance** rates based on **actual risk and competition**

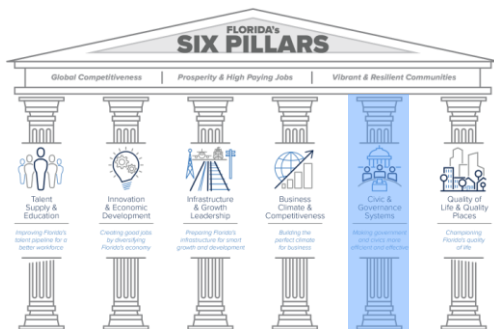
**#1 business tax climate** in the nation

**Regulatory, labor, and operating risk environments** rated among **top 5** in the nation

**Environmental permitting and local land use** processes rated among **top quartile in the nation**

**Occupational licensing laws** rated among **top 5 in the nation**

**Legal climate** improves to **top quartile in the nation**



Systems, Structures & Institutions  
that **Support- not impede-**  
**Free Enterprise & Action**

- **Align** Government Systems
- Simplify & Delayer
- **Leveraging** Voters, Volunteers, & Philanthropy

## Making 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

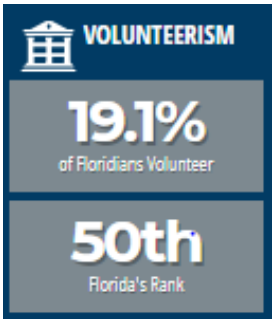


# Making Government & Civics More Efficient & Effective



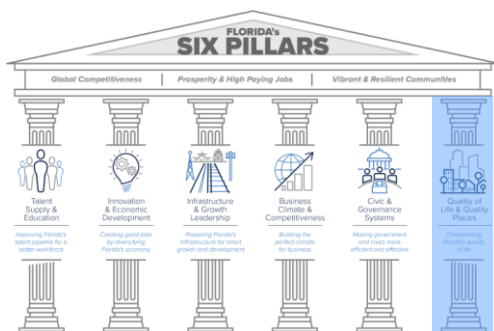
- 100% of state agencies aligned with Florida 2030 goals
- 100% of regional economic development plans aligned with Florida 2030 goals
- 100% of Florida residents covered by regional visioning processes
- Increased size and impact of nonprofit and philanthropic sectors
- Doubling the rate of Floridians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

# Making Government & Civics More Efficient & Effective



TheFloridaScorecard.org

- 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



**Healthy, Safe, Sustainable Quality of Life  
Paths to Prosperity for Every Floridian**

- **Sense of Place & Security**
- Address Generational Poverty
- Arts, Culture, Heritage
- Focus on **Florida Brand**



## 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

## Championing Florida's Quality of Life & Quality Places

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**

# Championing Florida’s Quality of Life & Quality Places



TheFloridaScorecard.org



**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**

*“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





What Do YOU Think?

Opportunities?

Barriers?

What is Underway?



Help secure Florida's future at  
[Florida2030.org](http://Florida2030.org)

Track Florida's progress at  
[TheFloridaScorecard.org](http://TheFloridaScorecard.org)



FLORIDA2030

FLORIDA CHAMBER FOUNDATION

SPECIAL THANKS TO OUR FLORIDA 2030 PARTNERS

PILLAR LEADERSHIP PARTNERS



SUSTAINING PILLAR PARTNERS



ANNUAL PILLAR PARTNERS

