


Florida 2030: Blueprint for Florida's Future Competitiveness

Central Florida/Orlando Regional Rollout



FLORIDA CHAMBER
Foundation

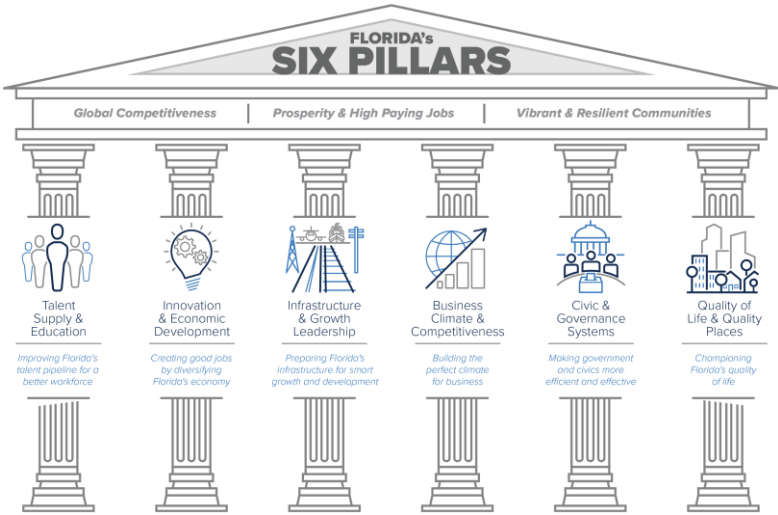
www.Florida2030.org
#FL2030 @FLChamberFdn

Tony Carvajal
Florida Chamber Foundation
TCarvajal@FLFoundation.org @WhatTonyCs

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



Key Florida Metrics			
UNEMPLOYMENT RATE	PERCENT OF POPULATION	PERCENT OF GROSS DOMESTIC PRODUCT	PERCENT OF POPULATION
4.7%	88.2	\$89.1	6,255
POPULATION	PERCENT OF POPULATION	PERCENT OF POPULATION	PERCENT OF POPULATION
259,800	106.0	24,085	
PERCENT OF POPULATION	PERCENT OF POPULATION	PERCENT OF POPULATION	PERCENT OF POPULATION
2.7%	\$805K	16.6%	77.8%
PERCENT OF POPULATION	PERCENT OF POPULATION	PERCENT OF POPULATION	PERCENT OF POPULATION



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?



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



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



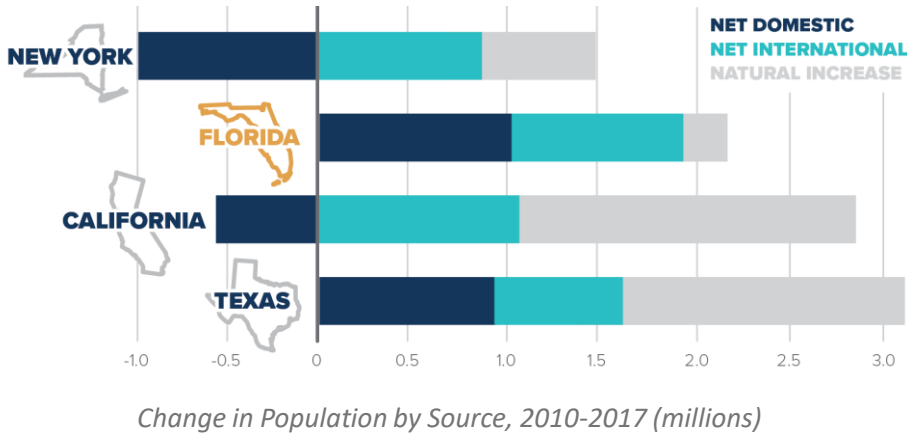
Help secure Florida's future at
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Track Florida's progress at
TheFloridaScorecard.org



Improving Florida's talent pipeline for a better workforce	Creating good jobs by diversifying Florida's economy	Preparing Florida's infrastructure for smart growth and development
<ul style="list-style-type: none">>80% of Florida's workforce has essential employability skills>60% of Floridians 25-64 have a high-value postsecondary certificate, degree, or training experience95% of entering high school students graduate within 4 years100% of Florida 8th graders read & perform math at or above grade level100% of Florida 3rd graders read at or above grade level100% of children are ready for kindergarten	<ul style="list-style-type: none">Top state for gross domestic product and top quartile most diversified state economy#1 state for overseas visitorsGoods exports double and services exports tripleTop 5 state for manufacturing jobsTop 3 state for technology jobs#1 state for business startupsTop 3 state for venture capital investmentsTop 3 state for research and development funding and patents issuedRural county share of Florida gross domestic product doubles	<ul style="list-style-type: none">Diverse, attainable housing to meet future demandEvery resident has access to public and private mobility servicesAll major population and economic centers connected to regional, national, and global markets by high-capacity corridorsWorld'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 connectivityDiverse and reliable energy, water, and waste management resources to meet future demandAll Florida residents protected by resiliency plans
Building the perfect climate for business	Making government and civics more efficient and effective	Championing Florida's quality of life
<ul style="list-style-type: none">Actuarially sound property insurance rates based on actual risk and competition#1 business tax climate in the nationRegulatory, labor, and operating risk environments rated among top 5 in the nationEnvironmental permitting and local land use processes rated among top quartile in the nationOccupational licensing laws rated among top 5 in the nationLegal climate improves to top quartile in the nation	<ul style="list-style-type: none">100% of state agencies aligned with Florida 2030 goals100% of regional economic development plans aligned with Florida 2030 goals100% of Florida residents covered by regional visioning processesIncreased size and impact of nonprofit and philanthropic sectorsDoubling the rate of Floridians who volunteer and participate in civic and public service, moving us from the bottom to the top quartile	<ul style="list-style-type: none">Top 5 state for overall well beingFlorida'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 householdsCrime rates rank among the lowest 10 statesFlorida protects and enhances the value of its arts, culture, heritage, and sense of place

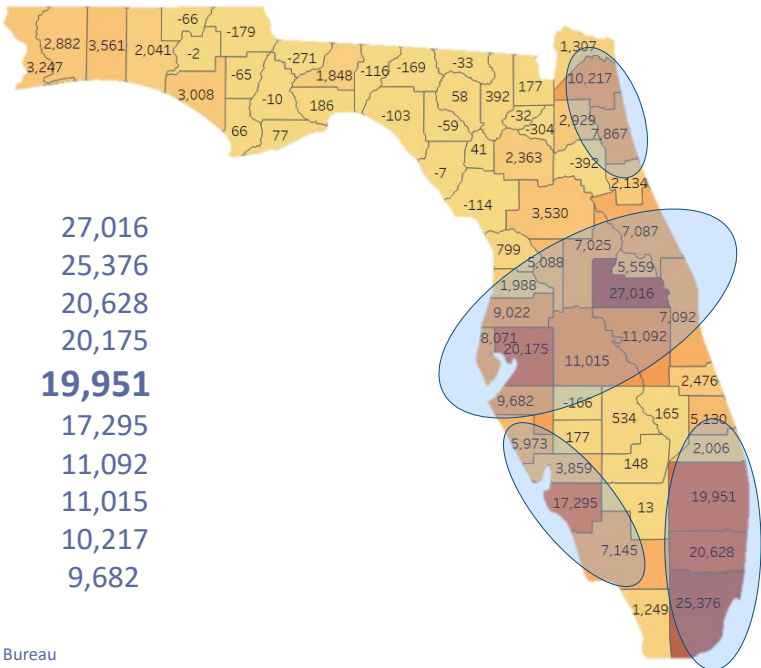
Growth



2016 to 2017
Population Changes

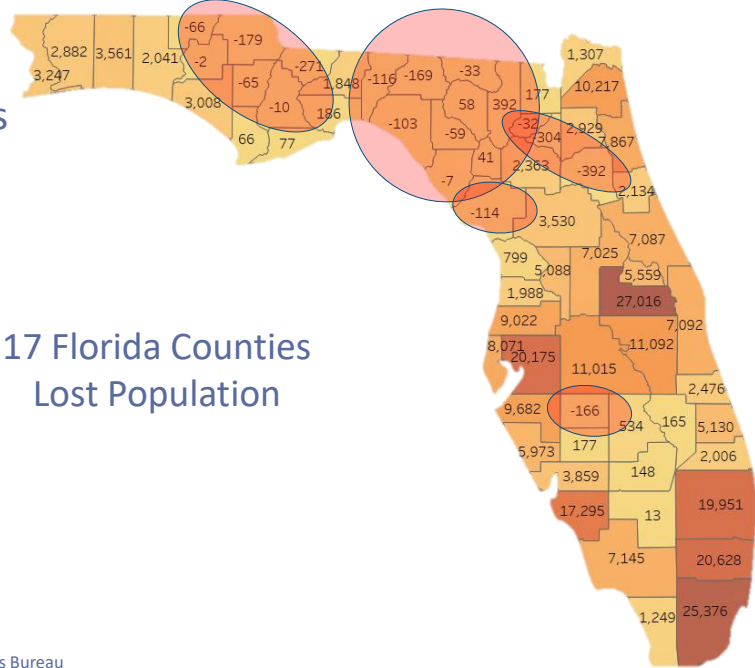
Top Counties:

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

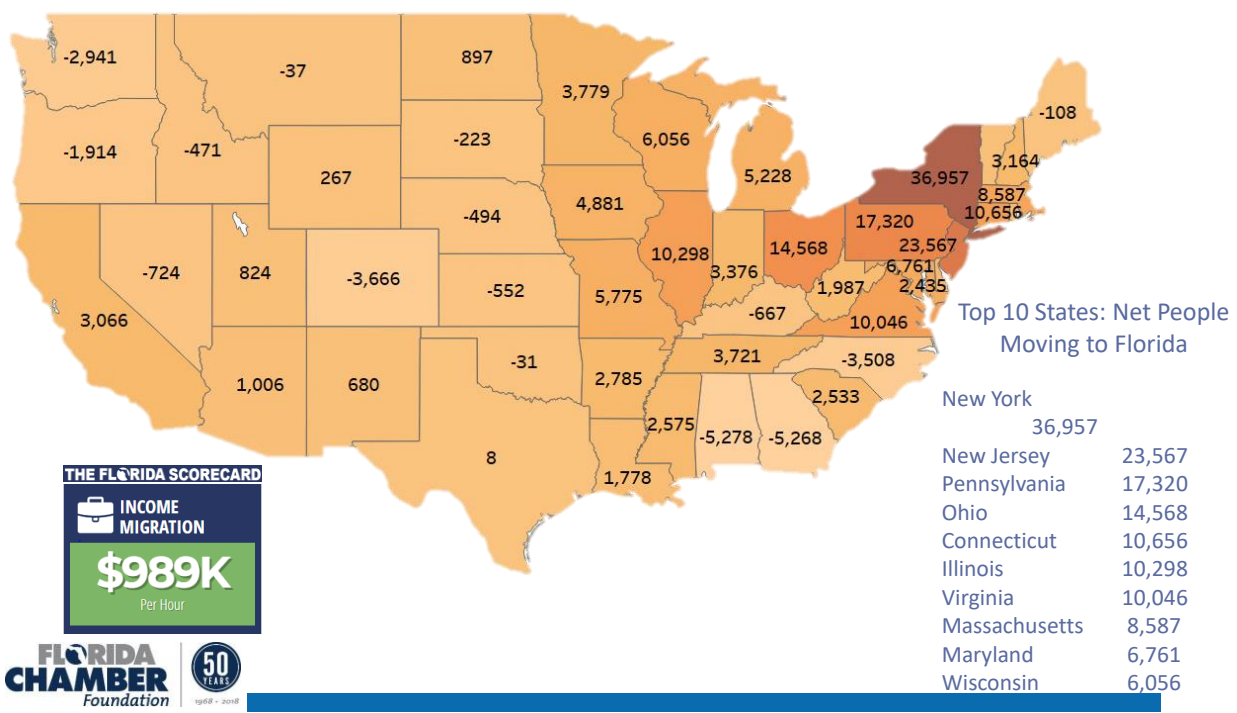
2016 to 2017
Population Changes



17 Florida Counties
Lost Population



Source: U.S. Census Bureau



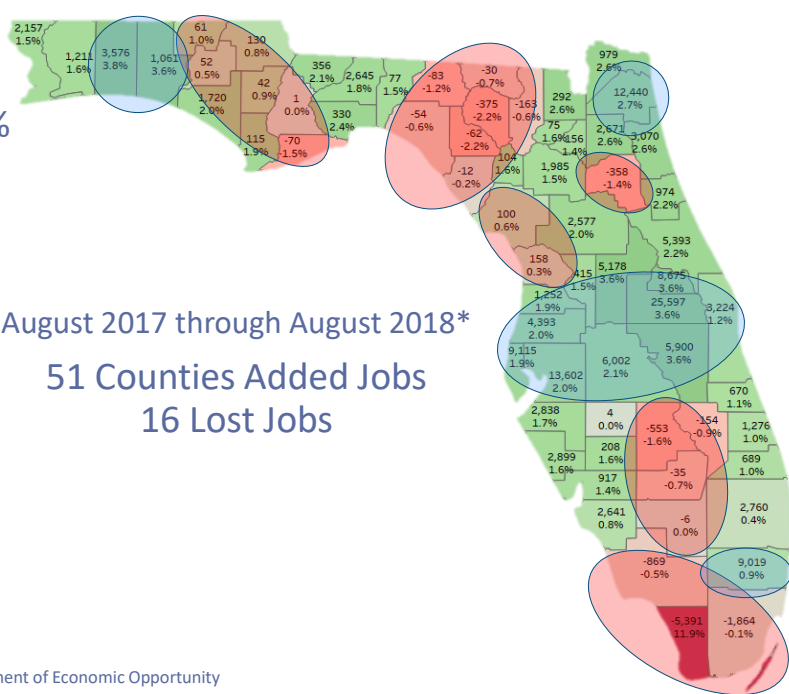
U.S. Growth Rate: 1.6%
Florida Growth Rate: 2.6%

- 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*

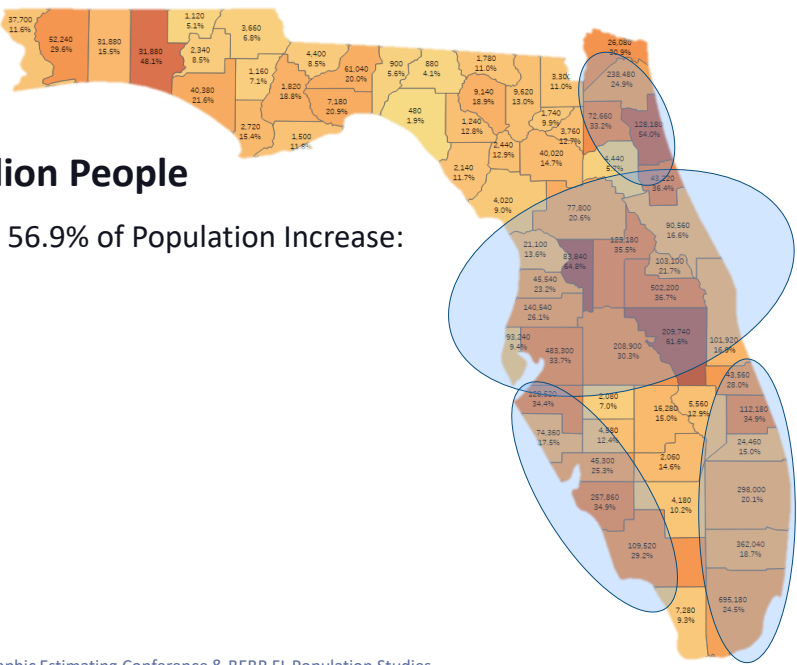
51 Counties Added Jobs
16 Lost Jobs



Florida’s next 5 million People

8 Counties to account for 56.9% of Population Increase:

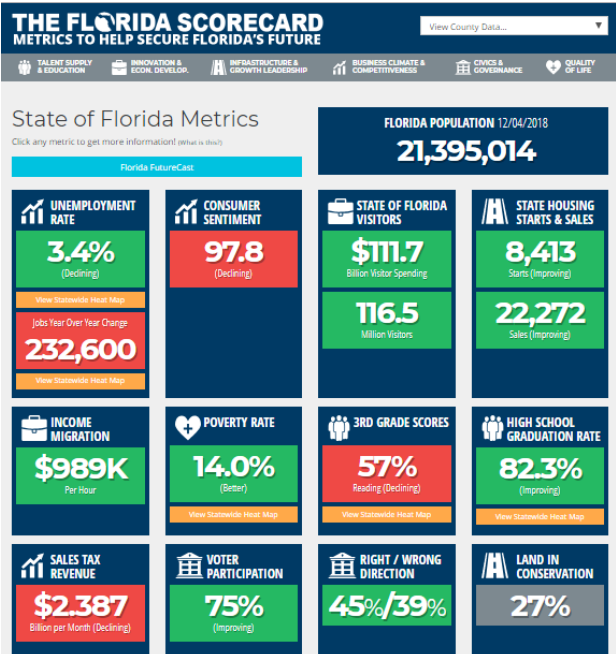
- 1.Miami-Dade
- 2.Orange
- 3.Hillsborough
- 4.Broward
- 5.Palm Beach**
- 6.Lee
- 7.Duval
- 8.Osceola

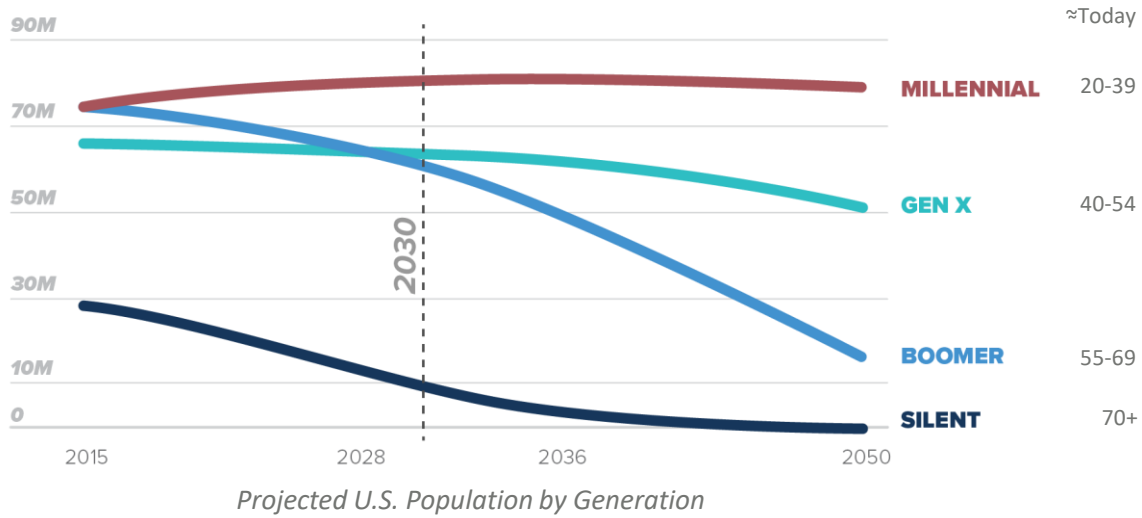



Source: FL Demographic Estimating Conference & BEBR FL Population Studies

www.theFloridaScorecard.org

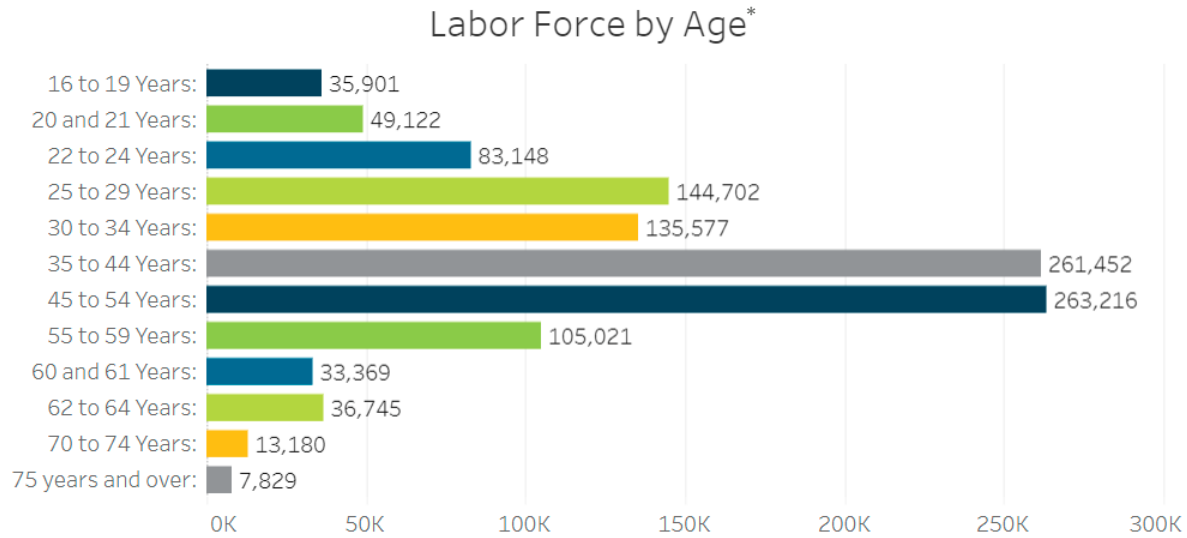
- Downloadable charts
- Data is downloadable
- Links to data sources
- Free to use





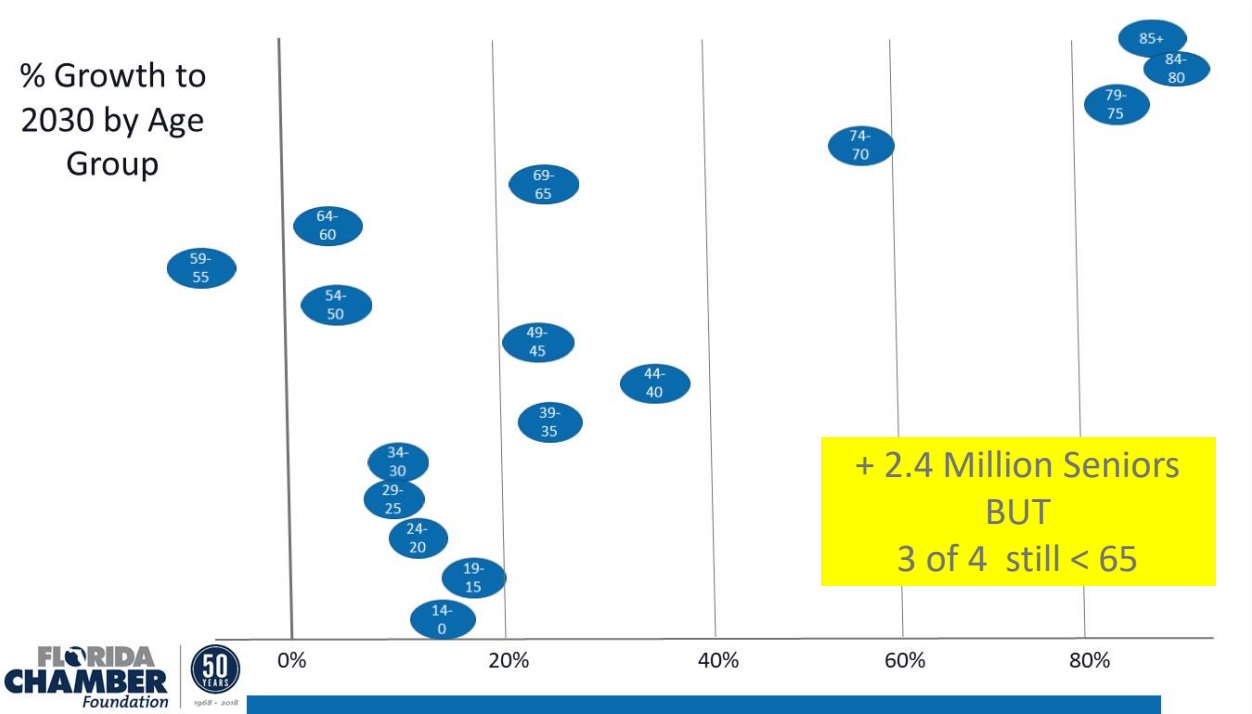
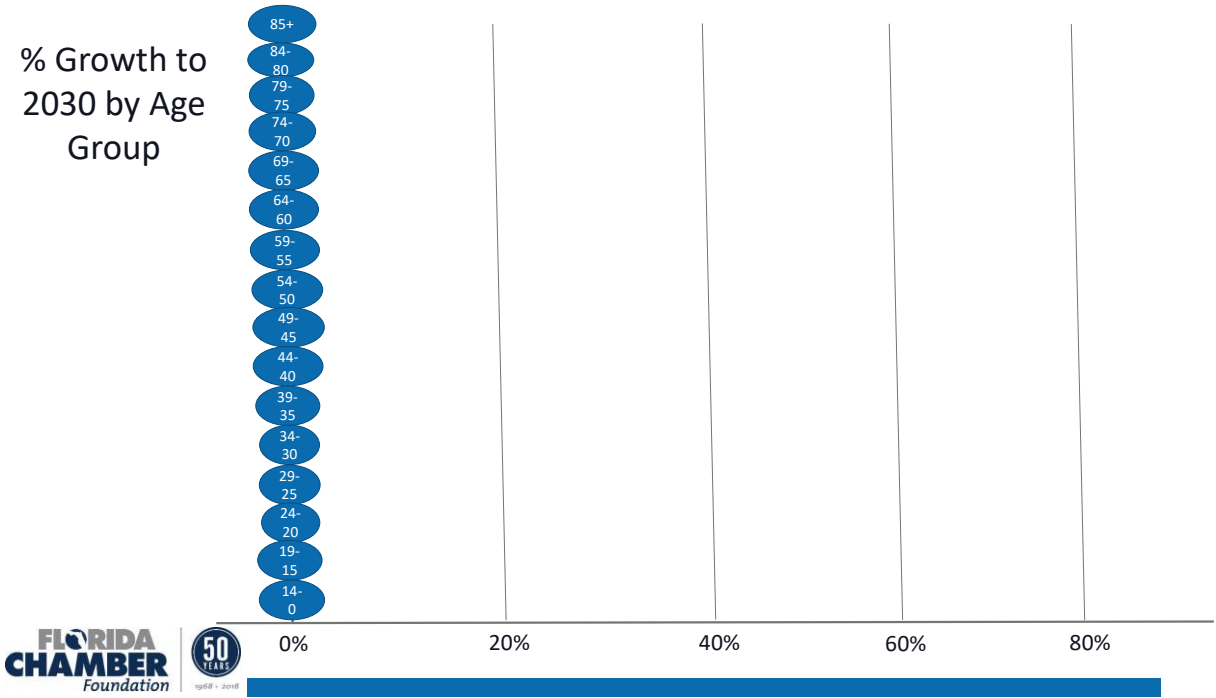


Source: Pew Research Center tabulations of U.S. Census Bureau population projections



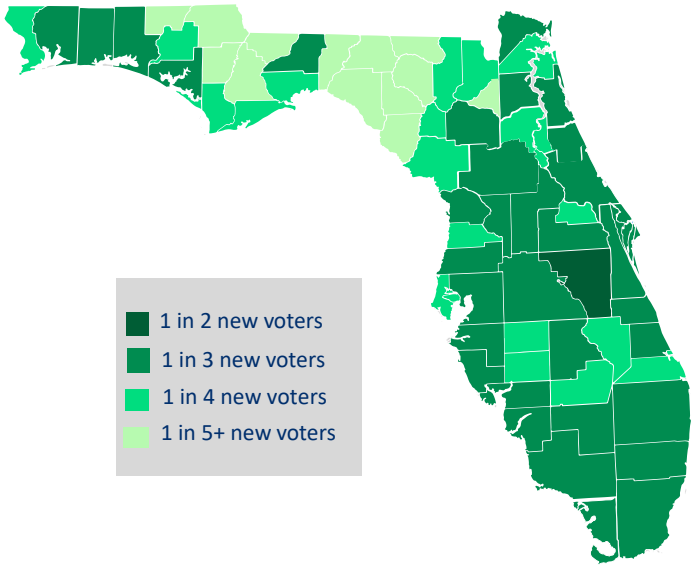


Source: http://lmsresources.labormarketinfo.com/labor_supply/index.html *CareerSource Central FL Region 12

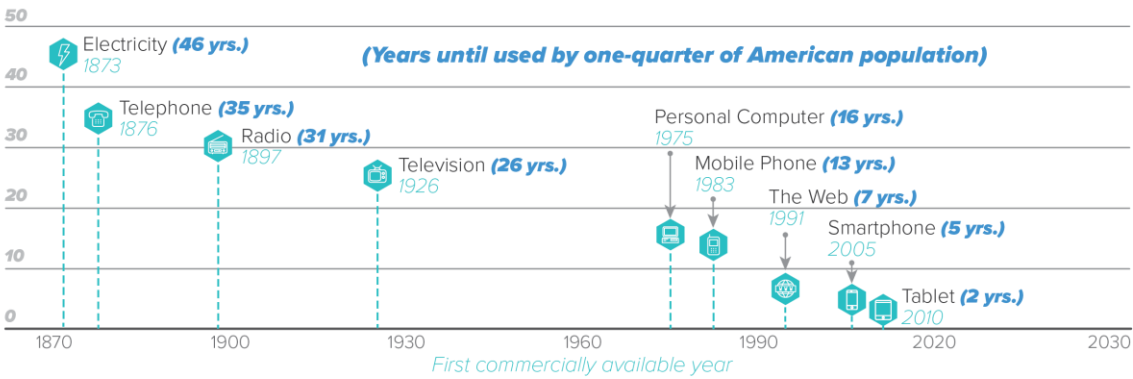


New Voters Since 2010

Statewide	4,574,839
Men	2,084,543 (46%)
Women	2,244,901 (49%)
Republicans	1,297,712 (28%)
Democrats	1,508,126 (33%)
NPA/Others	1,769,001 (38%)
White	2,601,405 (57%)
Black	567,957 (12%)
Hispanics	956,304 (21%)

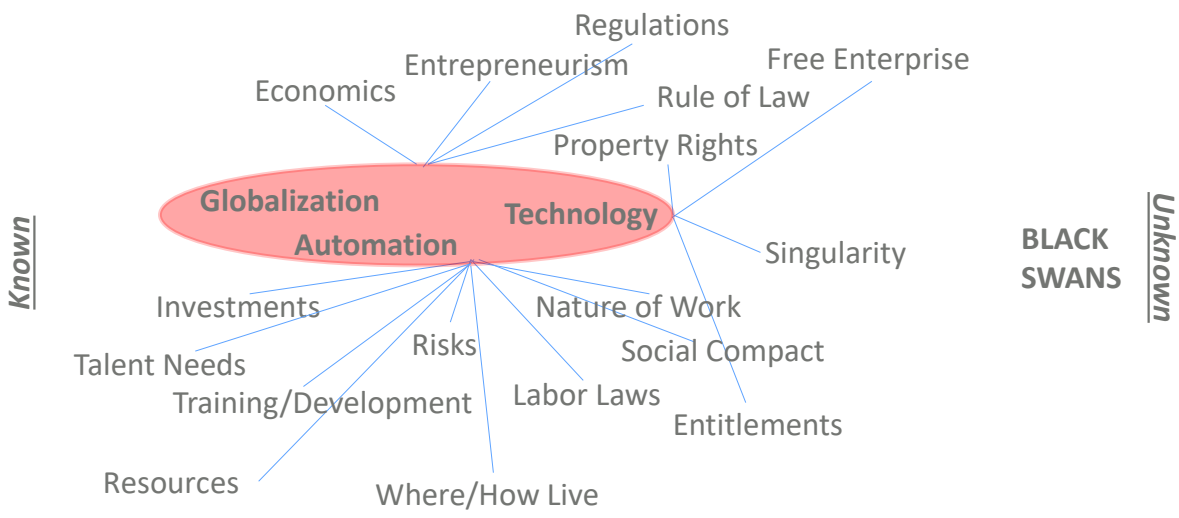


Innovation

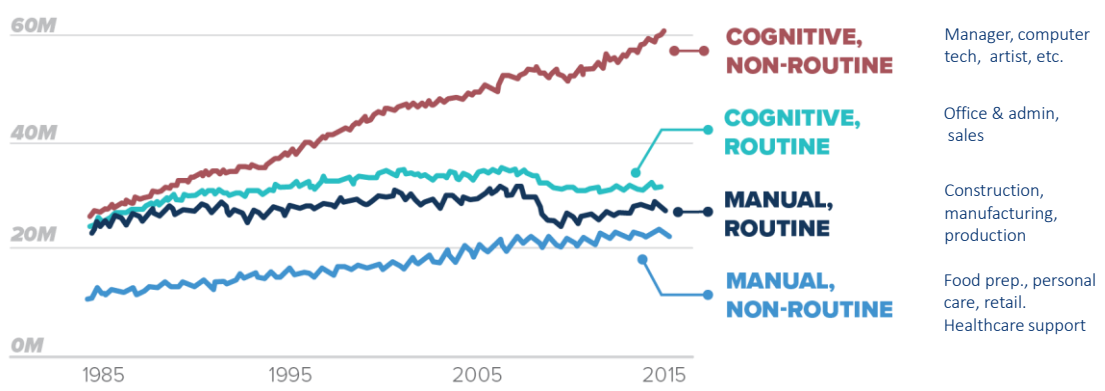


Source: Singularity.com

Technology Fueled Disruption Ahead



Nature of Work

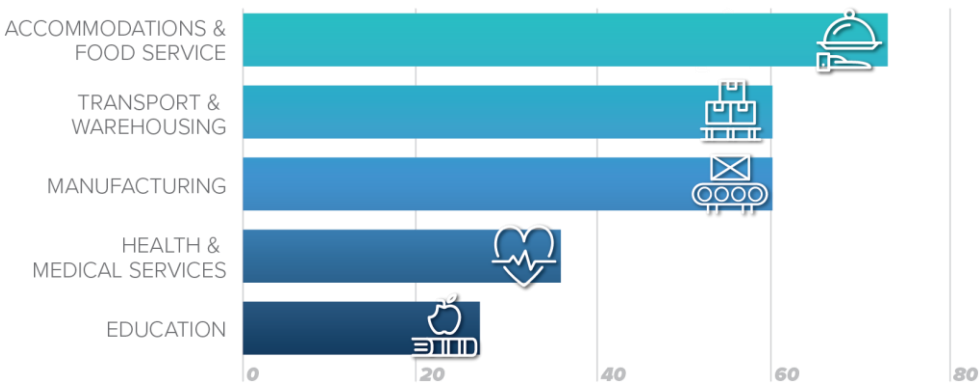


U.S. Employment by Job Type



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

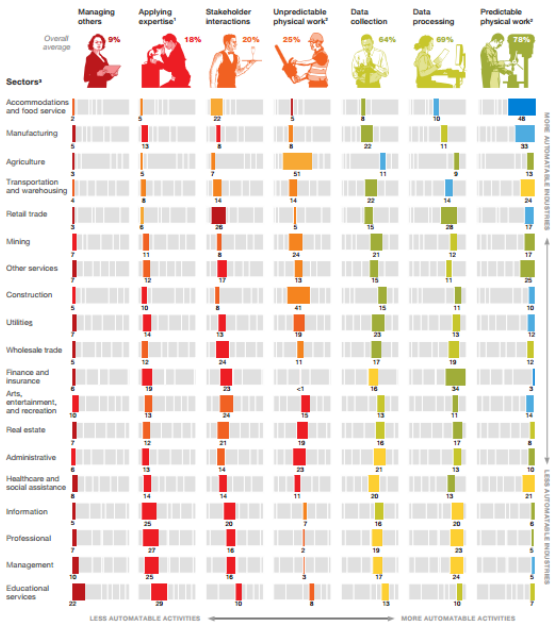
Nature of Work



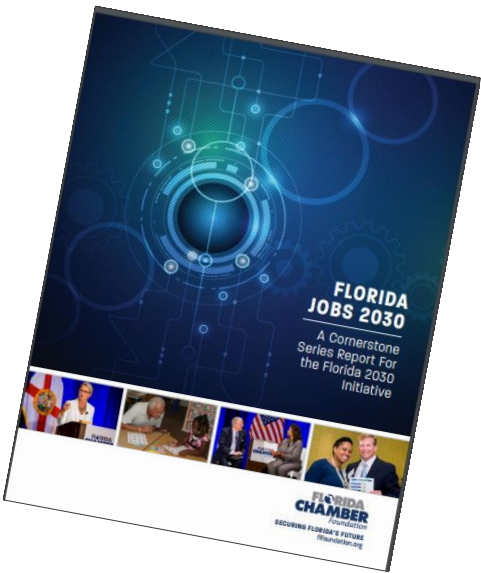
Percent of Selected Jobs that Could be Automated Using Existing Technology



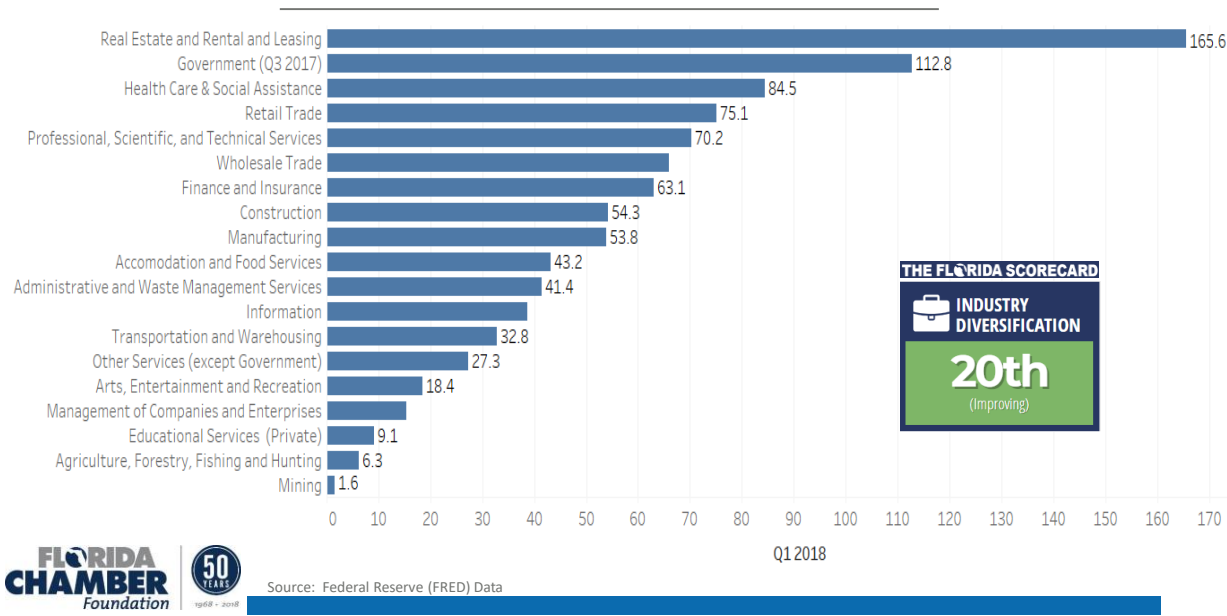
Source: McKinsey Global Institute, 2017.



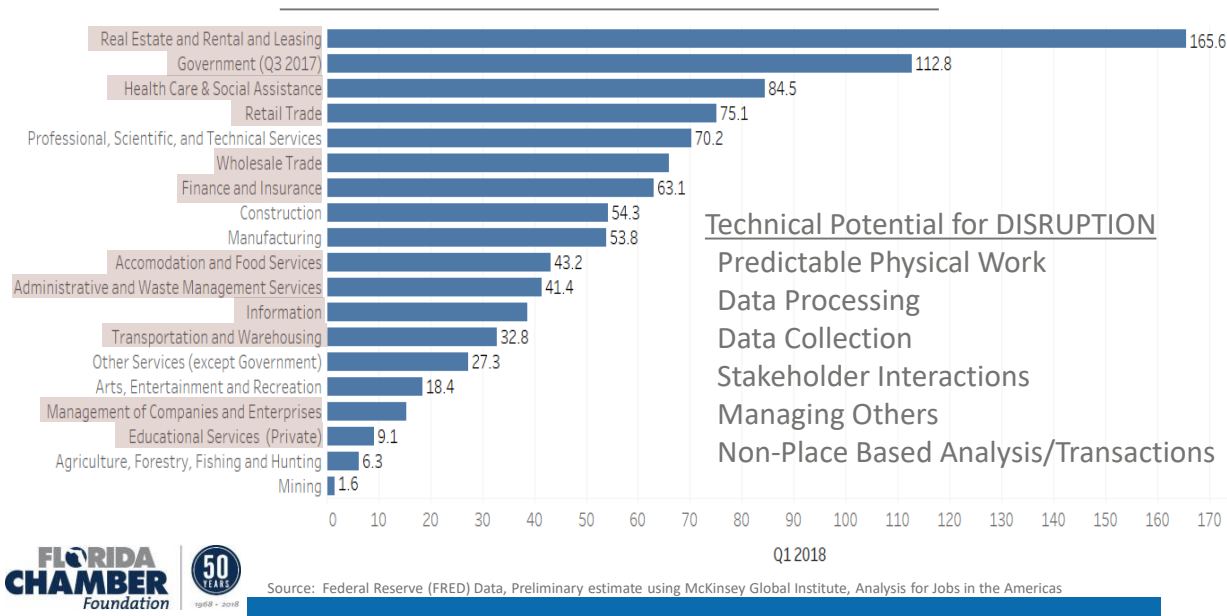
McKinsey Quarterly, July 2016

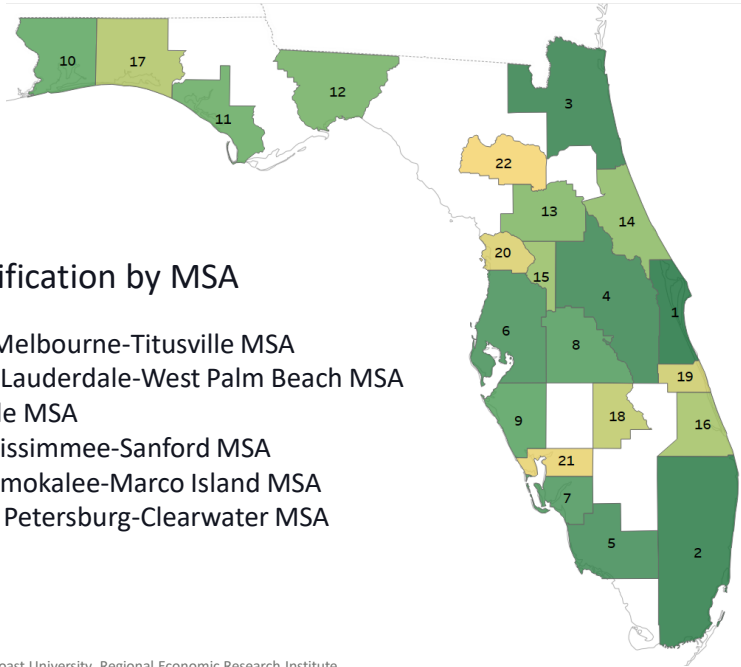


Florida’s \$1 Trillion GDP by Industry – Q1 2018 (\$Billion)



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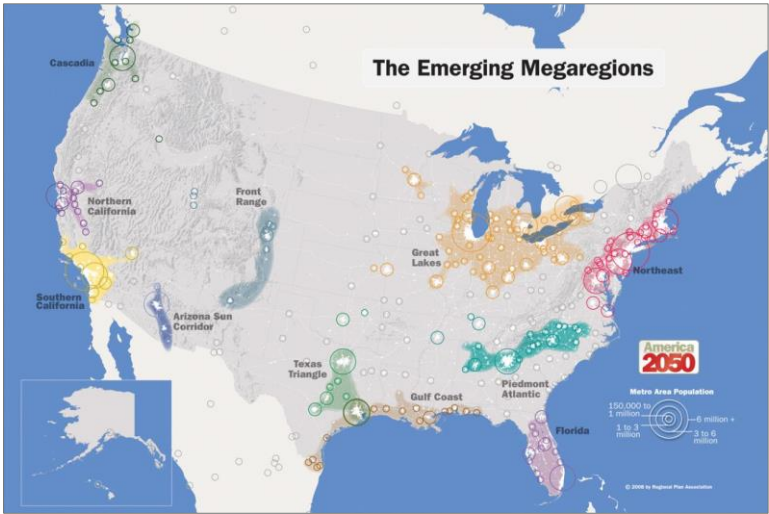


Florida Industry Diversification by MSA

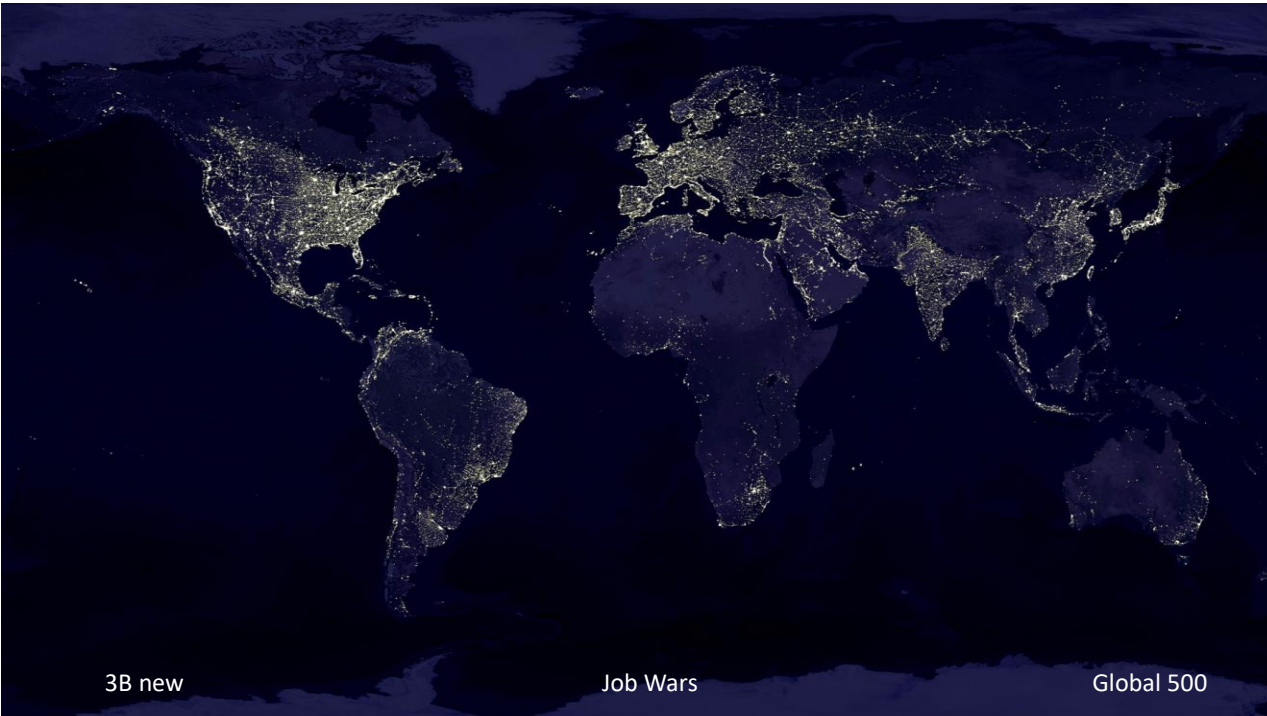
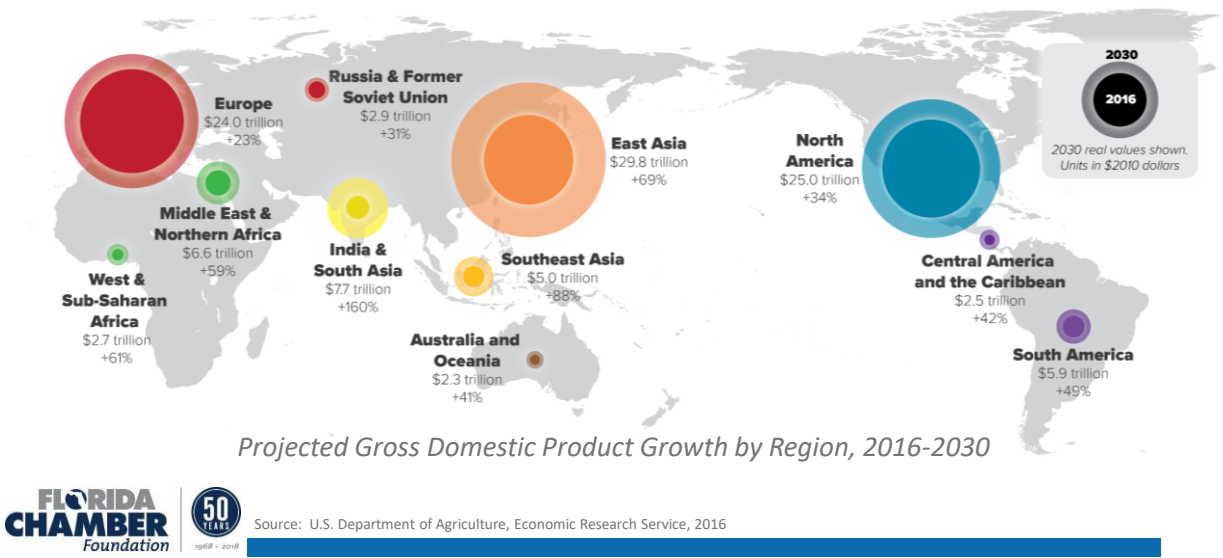
- #1 Most Diverse - Palm Bay-Melbourne-Titusville MSA
- #2 Most Diverse – Miami-Ft. Lauderdale-West Palm Beach MSA
- #3 Most Diverse – Jacksonville MSA
- #4 Most Diverse – Orlando-Kissimmee-Sanford MSA
- #5 Most Diverse – Naples-Immokalee-Marco Island MSA
- #6 Most Diverse – Tampa-St. Petersburg-Clearwater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



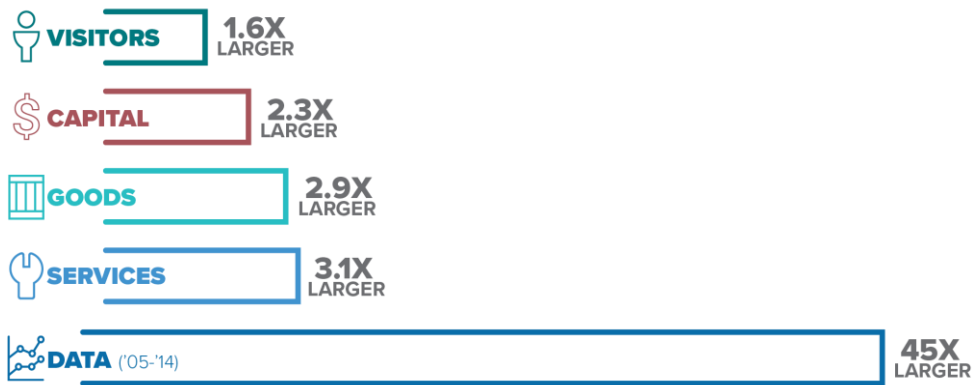
Source: Florida Gulf Coast University, Regional Economic Research Institute



Global Markets



Global Markets

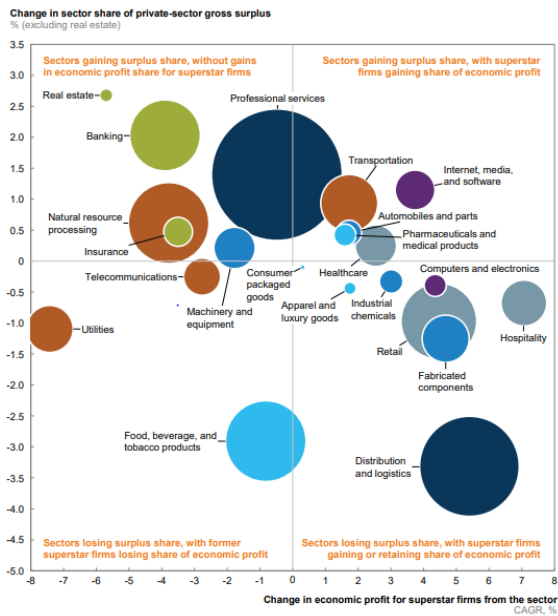


Global Growth in Cross-Border Flows, 2002-2014

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50
YEARS
1968 - 2018

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



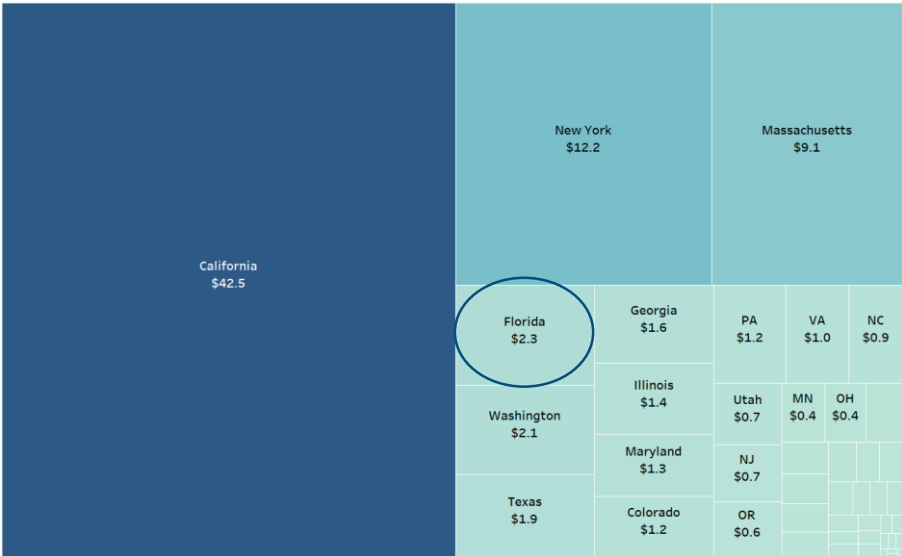
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50
YEARS
1968 - 2018

Source: McKinsey Global Institute, Superstars: the Dynamics of Firms, Sectors & Cities Leading the Global Economy, 2018

Venture Capital Increasing But Needs to Accelerate

- U.S. = \$84.7 Billion
- Florida #4 @ \$2.34 B
- California equals Florida on January 20th

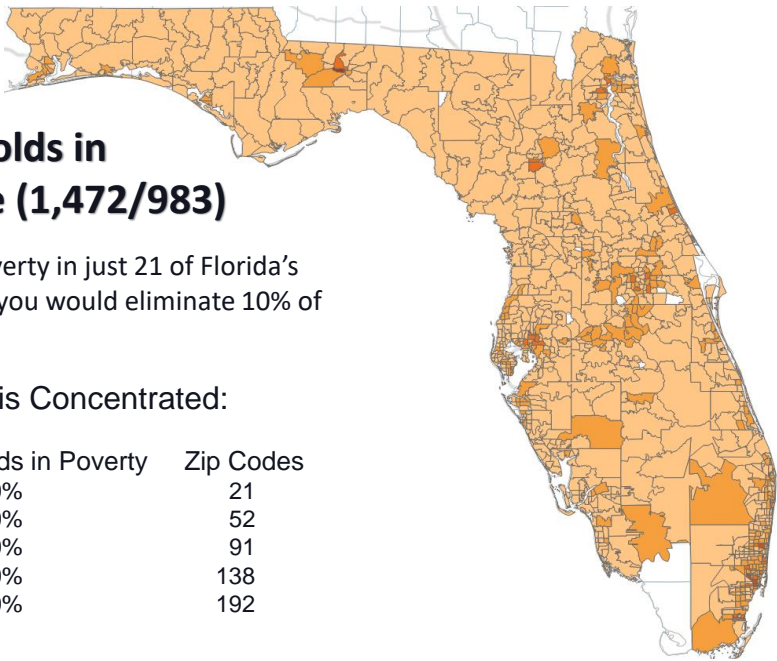


Number of Households in Poverty by Zip Code (1,472/983)

“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”

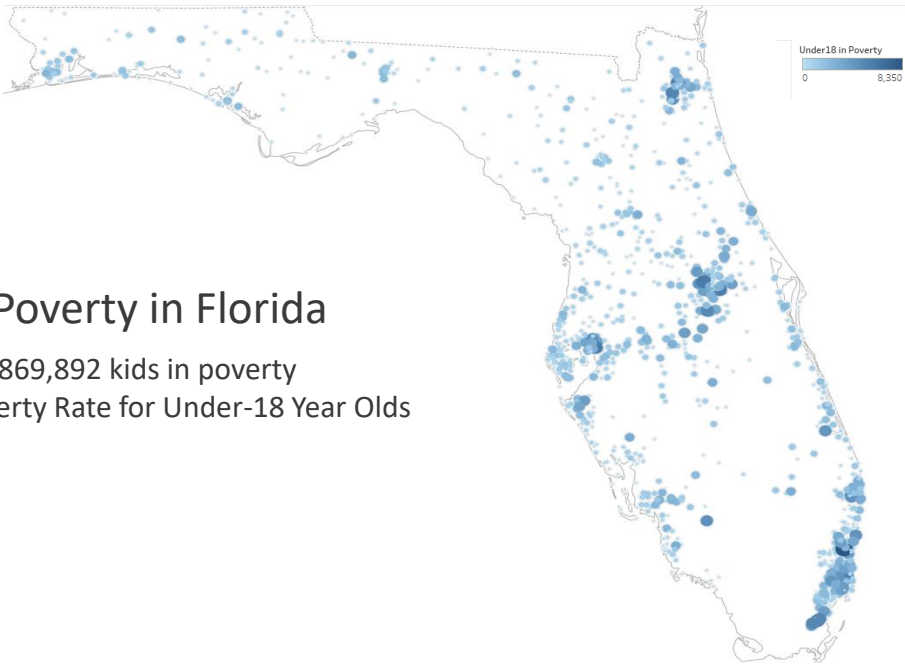
Poverty is Concentrated:

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

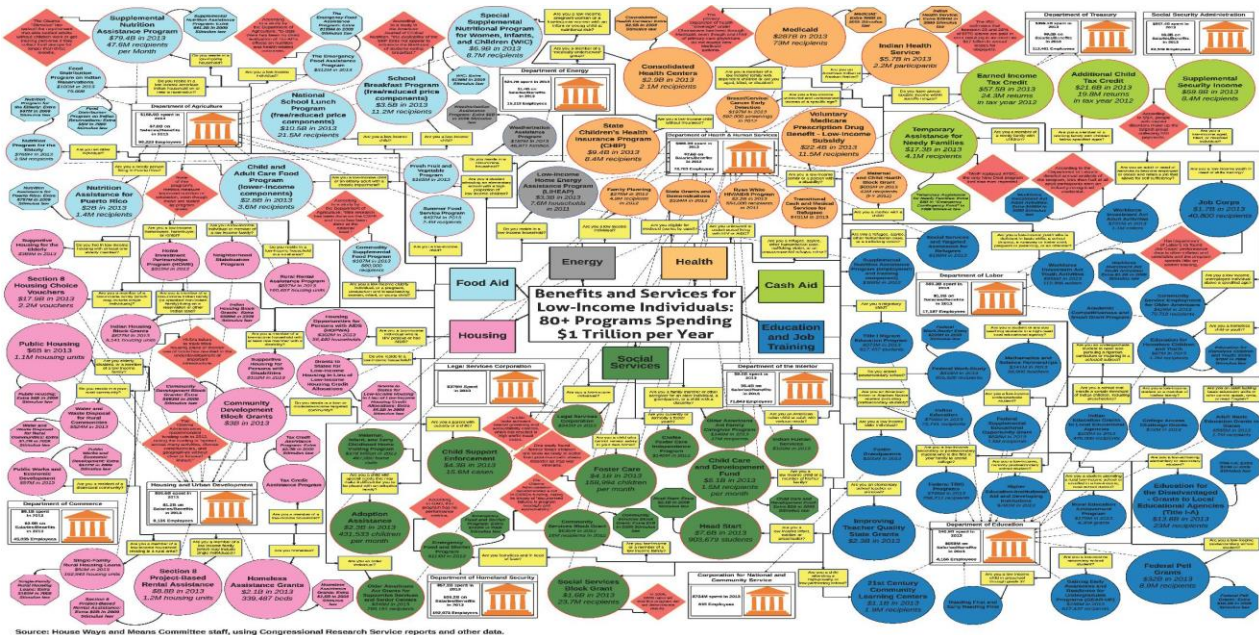


Kids in Poverty in Florida



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



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

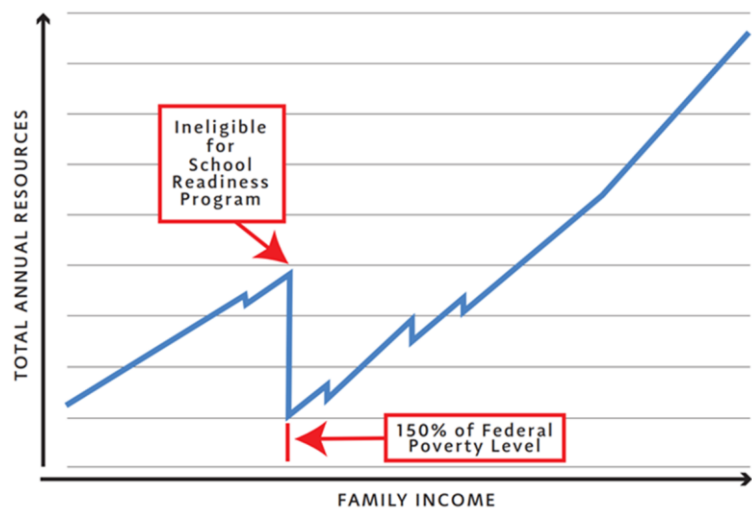
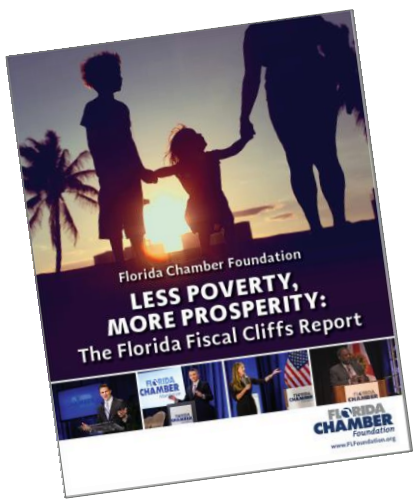


Source: House Ways and Means Committee staff, using Congressional Research Service reports and other data.



<https://waysandmeans.house.gov> August 22, 2016, Twenty Years After Republican Welfare Reform

Fiscal Cliffs Analysis



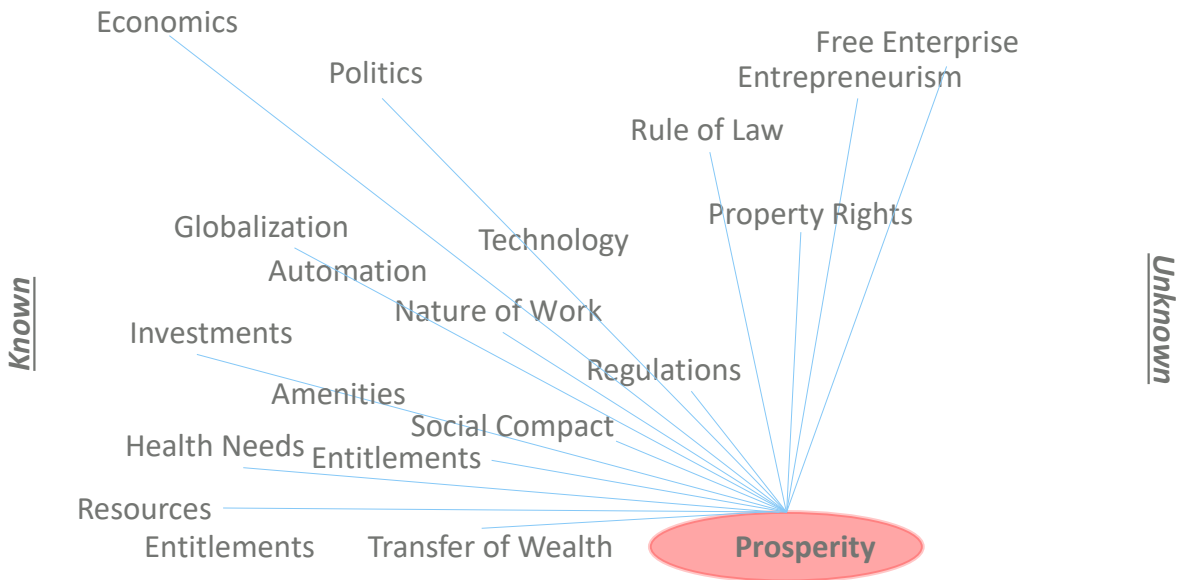
Paths To Prosperity and Vibrant & Resilient Communities



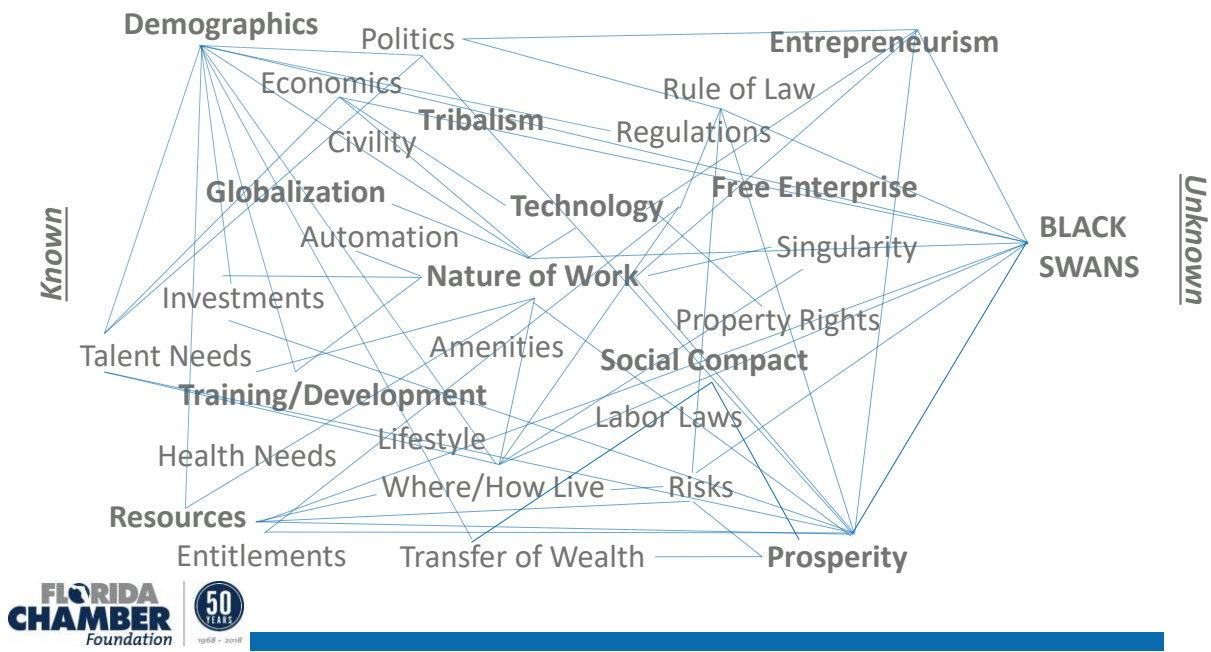
- ROOT CAUSES
- Jobs
 - Education
 - Housing
 - Transportation
 - Health
 - Food Security
 - Child & Family Care
 - Safety
 - Justice
 - Agency

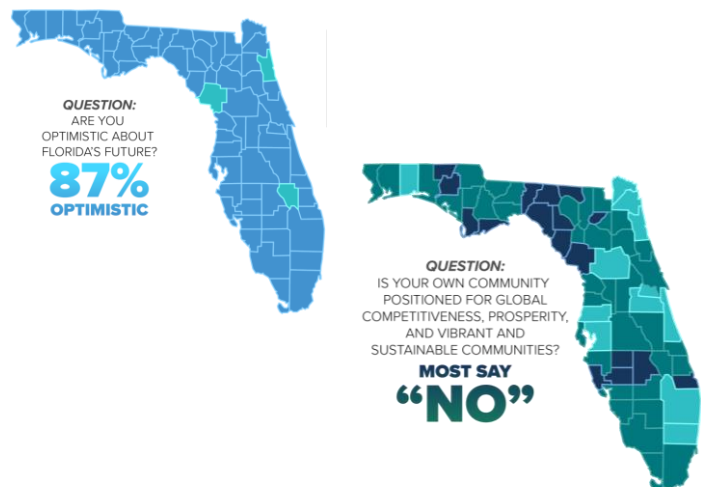


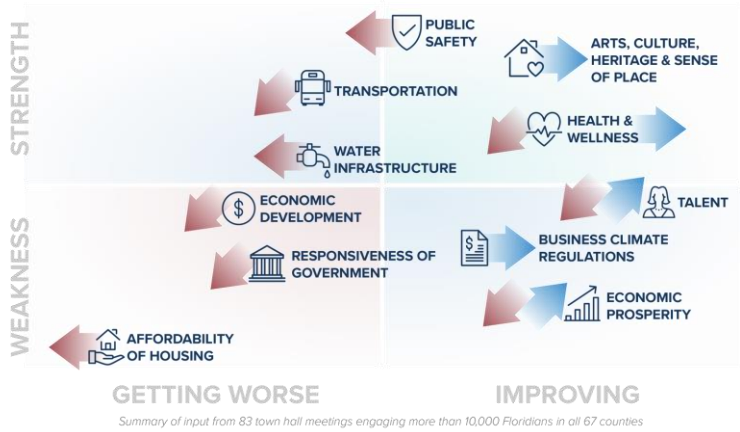
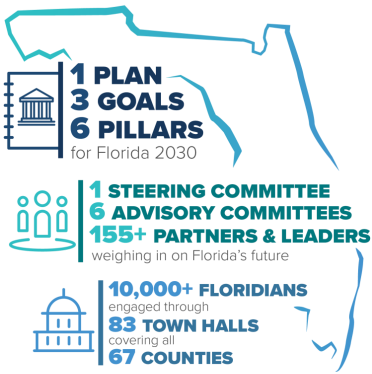
www.FloridaChamber.com/ProsperityInitiative



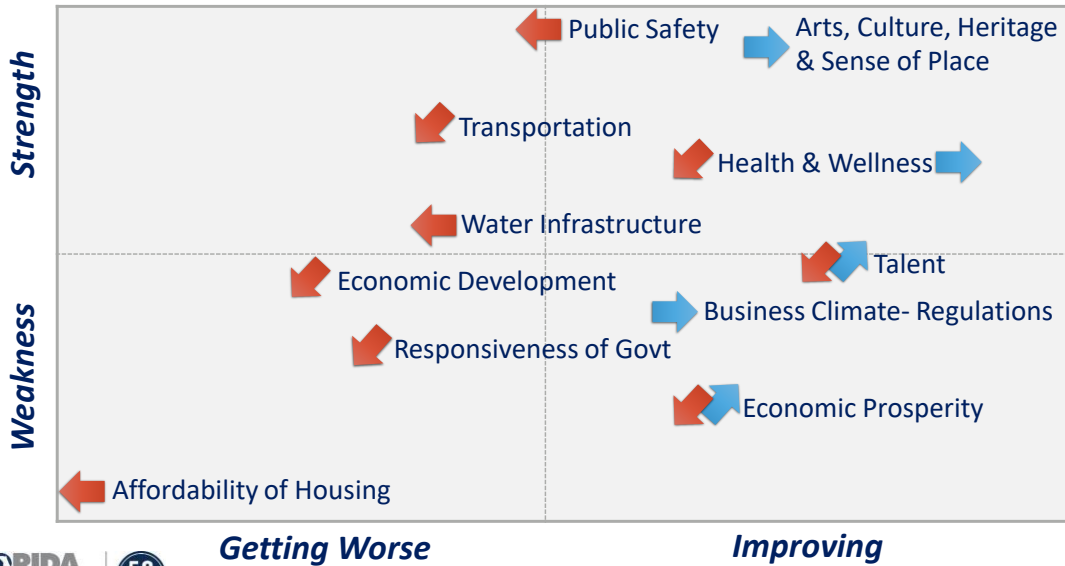
Web of Collisions



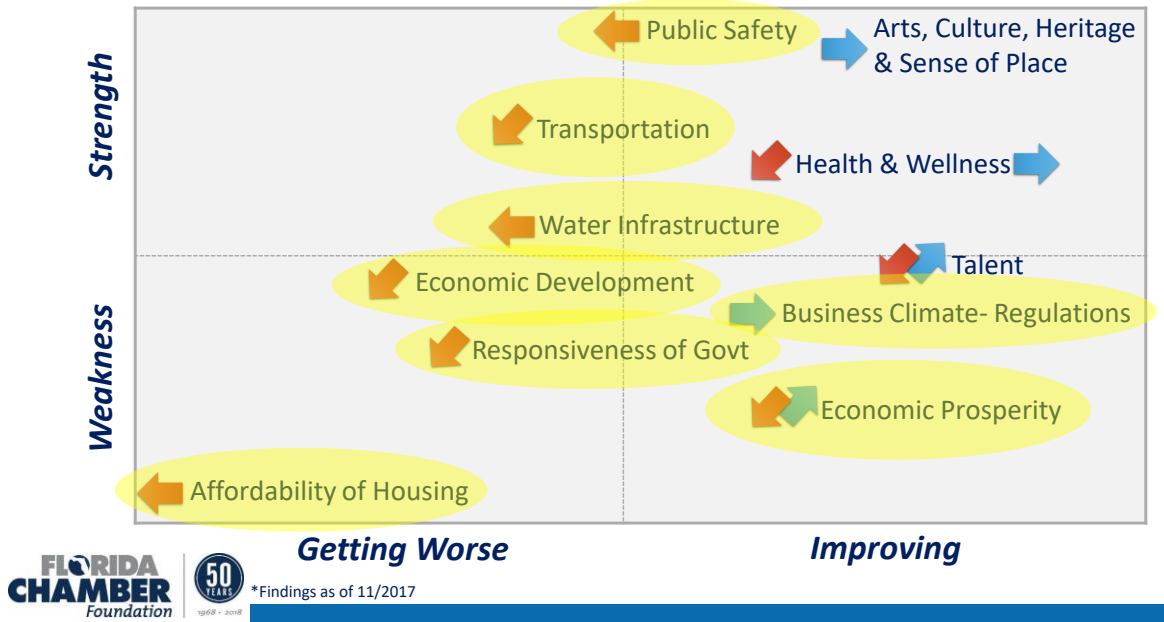




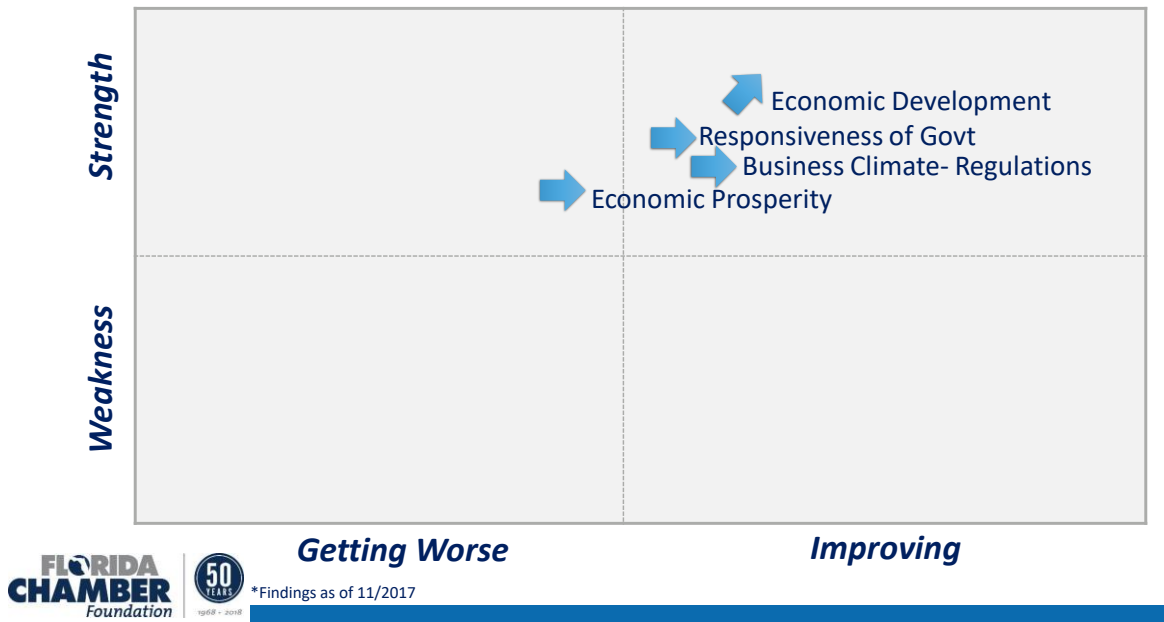
Summary of Town Hall Findings, Statewide Analysis, 2016-17



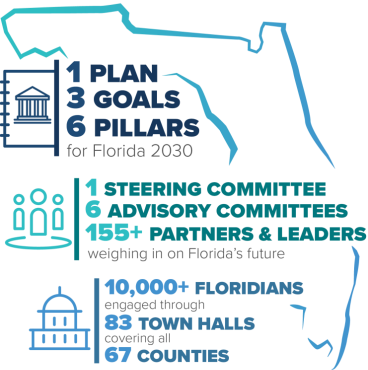
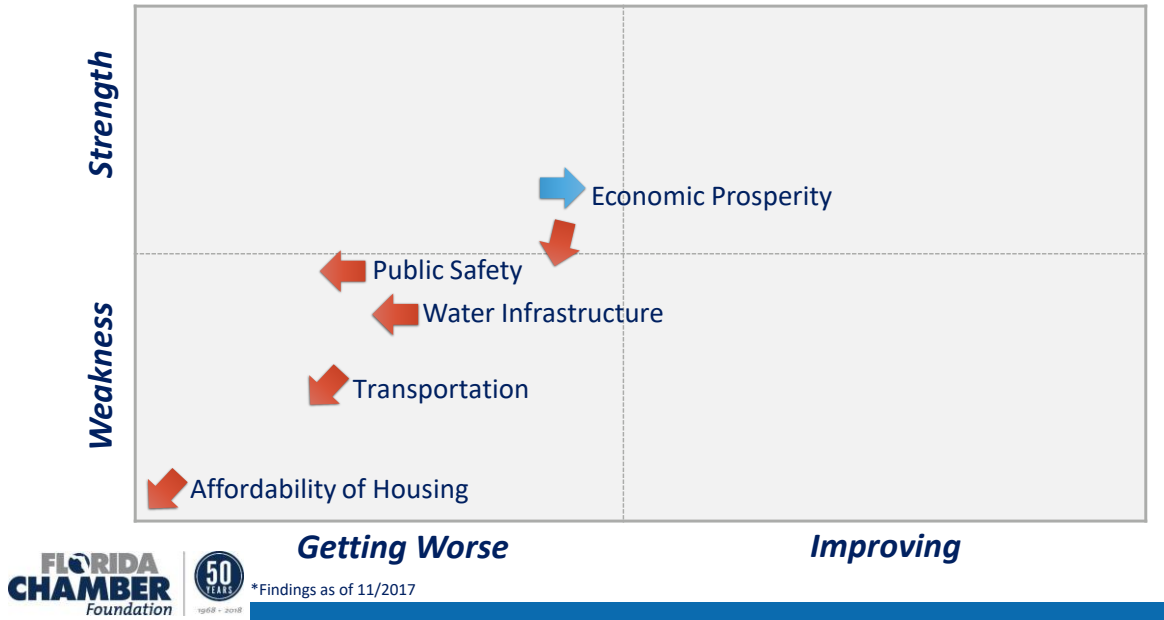
Summary of Town Hall Findings, Where Region Differed



How Central FL Region Differed – BETTER than State Composite



How Central FL Region Differed – WORSE than State Composite



Coordinates



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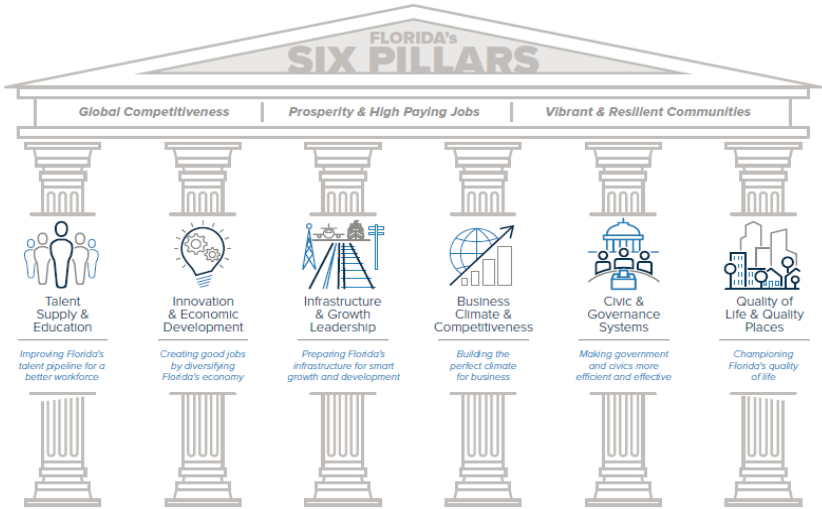


Improving Florida's talent pipeline for a better workforce	Creating good jobs by diversifying Florida's economy	Preparing Florida's infrastructure for smart growth and development
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Opportunities?

Barriers?

What is Underway?



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What Do YOU Think?

Opportunities?

Barriers?

What is Underway?





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