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

For more information:
Tony Carvajal, Tcarvajal@flfoundation.org
Florida 2030 - Orlando Regional Rollout
Florida Chamber Foundation

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
Florida 2030 - Orlando Regional Rollout
Florida Chamber Foundation

For more information:
Tony Carvajal, Tcarvajal@flfoundation.org

### Growth

<table>
<thead>
<tr>
<th>State</th>
<th>NET DOMESTIC</th>
<th>NET INTERNATIONAL</th>
<th>NET NATURAL INCREASE</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>1.5</td>
<td></td>
<td>0.5</td>
</tr>
<tr>
<td>Florida</td>
<td>1.0</td>
<td>0.5</td>
<td>1.0</td>
</tr>
<tr>
<td>California</td>
<td>0.5</td>
<td>1.5</td>
<td>1.0</td>
</tr>
<tr>
<td>Texas</td>
<td>0.5</td>
<td>0.5</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau

---

### Florida 2030 - Key Targets & Strategies

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

---

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

- **New York**: NET DOMESTIC = 1.5, NET INTERNATIONAL = 0.5, NET NATURAL INCREASE = 0.5
- **Florida**: NET DOMESTIC = 1.0, NET INTERNATIONAL = 0.5, NET NATURAL INCREASE = 1.0
- **California**: NET DOMESTIC = 0.5, NET INTERNATIONAL = 1.5, NET NATURAL INCREASE = 1.0
- **Texas**: NET DOMESTIC = 0.5, NET INTERNATIONAL = 0.5, NET NATURAL INCREASE = 1.0

Source: U.S. Census Bureau
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

17 Florida Counties Lost Population

For more information:
Tony Carvajal, Tcarvajal@flfoundation.org
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

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%
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

For more information:
Tony Carvajal, Tcarvajal@flfoundation.org
Projected U.S. Population by Generation

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

Labor Force by Age*

<table>
<thead>
<tr>
<th>Age Range</th>
<th>16 to 19 Years</th>
<th>20 and 21 Years</th>
<th>22 to 24 Years</th>
<th>25 to 29 Years</th>
<th>30 to 34 Years</th>
<th>35 to 44 Years</th>
<th>45 to 54 Years</th>
<th>55 to 59 Years</th>
<th>60 and 61 Years</th>
<th>62 to 64 Years</th>
<th>70 to 74 Years</th>
<th>75 years and over</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>35,901</td>
<td>49,122</td>
<td>83,148</td>
<td>144,702</td>
<td>135,577</td>
<td>261,452</td>
<td>263,216</td>
<td>105,021</td>
<td>33,369</td>
<td>36,745</td>
<td>13,180</td>
<td>7,829</td>
</tr>
</tbody>
</table>

Source: [http://lmsresources.labormarketinfo.com/labor_supply/index.html](http://lmsresources.labormarketinfo.com/labor_supply/index.html)

*CareerSource Central FL Region 12

For more information:
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For more information:
Tony Carvajal, Tcarvajal@flfoundation.org
New Voters Since 2010

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide</td>
<td>4,574,839</td>
<td></td>
</tr>
<tr>
<td>Men</td>
<td>2,084,543</td>
<td>46%</td>
</tr>
<tr>
<td>Women</td>
<td>2,244,901</td>
<td>49%</td>
</tr>
<tr>
<td>Republicans</td>
<td>1,297,712</td>
<td>28%</td>
</tr>
<tr>
<td>Democrats</td>
<td>1,508,126</td>
<td>33%</td>
</tr>
<tr>
<td>NPA/Others</td>
<td>1,769,001</td>
<td>38%</td>
</tr>
<tr>
<td>White</td>
<td>2,601,405</td>
<td>57%</td>
</tr>
<tr>
<td>Black</td>
<td>567,957</td>
<td>12%</td>
</tr>
<tr>
<td>Hispanics</td>
<td>956,304</td>
<td>21%</td>
</tr>
</tbody>
</table>

Innovation

Source: Singularity.com
Technology Fueled Disruption Ahead

- Globalization
- Automation
- Technology

Economics
Entrepreneurism
Rule of Law
Property Rights
Free Enterprise
Regulations
Singularity
Nature of Work
Social Compact
Labor Laws
Entitlements
Investments
Risks
Talent Needs
Training/Development
Resources
Where/How Live

Known

Unknown

BLACK SWANS

Nature of Work

U.S. Employment by Job Type

Manager, computer tech, artist, etc.
Office & admin, sales
Construction, manufacturing, production
Food prep., personal care, retail, Healthcare support

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

For more information:
Tony Carvajal, Tcarvajal@flfoundation.org
Nature of Work

Percent of Selected Jobs that Could be Automated Using Existing Technology

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

Source: Federal Reserve (FRED) Data

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

For more information:
Tony Carvajal, Tcarvajal@flfoundation.org
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
Global Markets

Projected Gross Domestic Product Growth by Region, 2016-2030


For more information:
Tony Carvajal, Tcarvajal@flfoundation.org
Global Markets

VISITORS 1.6X LARGER
CAPITAL 2.3X LARGER
GOODS 2.9X LARGER
SERVICES 3.1X LARGER

DATA (05-14) 45X LARGER


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
Venture Capital Increasing But Needs to Accelerate

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

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:
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Florida 2030 - Orlando Regional Rollout
Florida Chamber Foundation

For more information:
Tony Carvajal, Tcarvajal@ffoundation.org

www.FloridaChamber.com/ProsperityReport
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

www.FloridaChamber.com/ProsperityInitiative
Florida 2030 - Orlando Regional Rollout
Florida Chamber Foundation

Web of Collisions

Known
Demographics
Politics
Economics
Civility
Globalization
Automation
Nature of Work
Investments
Talent Needs
Training/Development
Health Needs
Resources
Entitlements

Unknown
Entrepreneurism
Rule of Law
Regulations
Technology
Free Enterprise
Singularity
Property Rights
Social Compact
Labor Laws
Amenities
Where/How Live
Risks
Prosperity
Transfer of Wealth

For more information:
Tony Carvajal, Tcarvajal@flfoundation.org

#IsFLReady
#FL2030
Summary of Town Hall Findings, Statewide Analysis, 2016-17

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

**Weakness**
- Affordability of Housing
- Responsiveness of Govt
- Business Climate- Regulations
- Economic Prosperity

**Getting Worse**
- Arts, Culture, Heritage & Sense of Place
- Health & Wellness
- Talent

**Improving**
- Transportation
- Water Infrastructure
- Economic Development
- Affordability of Government

*Findings as of 11/2017*
Summary of Town Hall Findings, Where Region Differed

<table>
<thead>
<tr>
<th></th>
<th>Getting Worse</th>
<th>Improving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strength</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Transportation</td>
<td>Health &amp; Wellness</td>
</tr>
<tr>
<td></td>
<td>Water Infrastructure</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Economic Development</td>
<td>Talent</td>
</tr>
<tr>
<td></td>
<td>Responsiveness of Govt</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Public Safety</td>
<td>Arts, Culture, Heritage &amp; Sense of Place</td>
</tr>
<tr>
<td></td>
<td>Affordability of Housing</td>
<td></td>
</tr>
</tbody>
</table>

For more information:
Tony Carvajal, Tcarvajal@flfoundation.org
How Central FL Region Differed – WORSE than State Composite

**Strength**
- Economic Prosperity

**Weakness**
- Public Safety
- Water Infrastructure
- Transportation
- Affordability of Housing

*Findings as of 11/2017*

**Getting Worse**

**Improving**

---

1. **Plan**
2. **Goals**
3. **Pillars**
   - for Florida 2030

**1 Steering Committee**
**6 Advisory Committees**
**155+ Partners & Leaders**

10,000+ Floridians engaged through
83 Town Halls covering 67 Counties

---

For more information:
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Coordinates

Help secure Florida’s future at Florida2030.org
Track Florida’s progress at TheFloridaScorecard.org

Improving Florida’s talent pipeline for a better workforce
- At least 50% of Florida’s workforce has essential employability skills
- 60% of Floridians 25-64 have a high school postsecondary certificate, degree, or training experience
- 90% of graduating high school students graduate within 6 years
- 30% of fourth graders read at or above grade level
- 50% of fourth graders read at or above grade level
- 100% of children are ready for kindergarten

Creating good jobs by diversifying Florida’s economy
- Top state for gross domestic product and top state per capita diversified state economy
- #1 state for overall new business startups
- #1 state for overall new business startups
- #1 state for overall new business startups
- #1 state for overall new business startups
- #1 state for overall new business startups
- #1 state for overall new business startups
- #1 state for overall new business startups
- #1 state for overall new business startups

Preparing Florida’s infrastructure for smart growth and development
- Diverse, affordable 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 port, deep-draft ports, airports, and surface transportation hubs
- 100% of Florida residents have access to high-speed communications connectivity
- Efficient and reliable energy, water, and waste management resources
- 100% of Florida residents protected by resiliency plans

Building the perfect climate for business
- Actively 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 5 in the nation
- Occupational licensing laws rated among top 5 in the nation
- Legal climate improves to top-quartile in the nation

Making government and civics more efficient and effective
- 100% of state agencies aligned with Florida 2030 goals
- 100% of state agencies aligned with Florida 2030 goals
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Championing Florida’s quality of life
- Top 5 state for overall well-being
- Florida’s brand and reputation as best place to live, work, raise a family, visit, learn, play, recreate, and compete remains top in the nation
- 100% of Florida children live in poverty
- 100% of Florida children live in poverty
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For more information:
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Opportunities?
Barriers?
What is Underway?

Help secure Florida's future at Florida2030.org
Track Florida's progress at TheFloridaScorecard.org

What Do YOU Think?
Opportunities?
Barriers?
What is Underway?

For more information:
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