“Florida is changing. Our **economics**, our **demographics** and our **politics** are all changing and these changes are both opportunities and challenges.” – Mark Wilson
50 Years of Securing Florida’s Future

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

Florida’s SIX PILLARS

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 – Palm Beach Regional Rollout
Florida Chamber Foundation

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

Source: U.S. Census Bureau

Growth

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

Source: U.S. Census Bureau

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Top 10 States: Net 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

www.theFloridaScorecard.org

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

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

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

Projected U.S. Population by Generation

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

Labor Force by Age *

Source: http://lmsresources.labormarketinfo.com/labor_supply/index.html

*CareerSource PBC Region 21

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
% Growth to 2030 by Age Group

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
New Voters Since 2010

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</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>

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Technology Fueled Disruption Ahead

- Globalization
- Automation
- Technology
- Known
- Unknown
- Economics
- Regulation
- Free Enterprise
- Entrepreneurism
- Rule of Law
- Property Rights
- Singularity
- Automation
- Technology
- Nature of Work
- Social Compact
- Labor Laws
- Entitlements
- Investments
- Talent Needs
- Training/Development
- Resources
- Where/How Live

Innovation

- Electricity (46 yrs.)
- Telephone (35 yrs.)
- Radio (31 yrs.)
- Television (26 yrs.)
- Personal Computer (16 yrs.)
- Mobile Phone (13 yrs.)
- The Web (7 yrs.)
- Smartphone (5 yrs.)
- Tablet (2 yrs.)

(Years until used by one-quarter of American population)

First commercially available year

Source: Singularity.com

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

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

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)

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

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

**Global Growth in Cross-Border Flows, 2002-2014**

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
9 out of 10 Floridians live in urban areas ...and probably will in 2030 too.

Source: Urban Land Institute

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

Category 3+ Hurricanes Near Florida, 1854-2017

Declared US. Disasters by Year

Source: National Oceanic and Atmospheric Administration, Federal Emergency Management Administration (three-year rolling average)
Known

Florida Chamber Foundation

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

Unknown
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>

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

Kids in Poverty in Florida

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

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

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Strategic Thinking about Florida’s Future
How Florida CEOs see the state’s future shaping up

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Florida 2030

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

<table>
<thead>
<tr>
<th>Strength</th>
<th>Weakness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Safety</td>
<td>Art, Culture, Heritage &amp; Sense of Place</td>
</tr>
<tr>
<td>Transportation</td>
<td>Health &amp; Wellness</td>
</tr>
<tr>
<td>Water Infrastructure</td>
<td>Economic Development</td>
</tr>
<tr>
<td>Economic Development</td>
<td>Responsiveness of Govt</td>
</tr>
</tbody>
</table>

Getting Worse

Improving

*Findings as of 11/2017

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Summary of Town Hall Findings, Where Palm Beach Differed

Strength
- Transportation
- Economic Development

Weakness
- Affordability of Housing
- Water Infrastructure

Getting Worse
- Public Safety
- Health & Wellness
- Responsiveness of Govt

Improving
- Arts, Culture, Heritage & Sense of Place
- Talent
- Economic Prosperity

How PALM BEACH Differed – BETTER than State Composite

Strength
- Economic Development
- Economic Prosperity

Weakness

Getting Worse

Improving

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
How PALM BEACH Differed – WORSE than State Composite

Strength

Weakness

Getting Worse

Improving

*Findings as of 11/2017

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

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

Florida's Six Pillars

- Talent Supply & Education
- Innovation & Economic Development
- Infrastructure & Growth Leadership
- Business Climate & Competitiveness
- Civic & Governance Systems
- Quality of Life & Quality Places

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

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

>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

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@flfoundation.org
Creating Good Jobs by Diversifying Florida’s Economy

The Florida Scorecard.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

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

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@flfoundation.org
Building the Perfect Climate For Business

TheFloridaScorecard.org

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

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
Making Government & Civics More Efficient & Effective

<table>
<thead>
<tr>
<th>67</th>
<th>counties</th>
</tr>
</thead>
<tbody>
<tr>
<td>412</td>
<td>municipal governments</td>
</tr>
<tr>
<td>95</td>
<td>school districts</td>
</tr>
<tr>
<td>1,077</td>
<td>special districts</td>
</tr>
<tr>
<td>72</td>
<td>regional or county economic development organizations</td>
</tr>
<tr>
<td>24</td>
<td>regional workforce boards</td>
</tr>
<tr>
<td>10</td>
<td>regional planning councils</td>
</tr>
<tr>
<td>27</td>
<td>metropolitan planning organizations</td>
</tr>
</tbody>
</table>

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

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

TheFloridaScorecard.org
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.

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

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

Opportunities?

Barriers?

What is Underway?

For More Information:
Tony Carvajal, tcarvajal@flfoundation.org
www.Florida2030.org
TheFloridaScorecard.org

Mark Your Calendar:
Economic Outlook & Jobs Forecast,
January 14, Orlando

Business Leaders Summit on Prosperity & Economic Opportunity,
May 22-23, West Palm Beach

Learners 2 Earners Summit Workforce Summit with Apprenticeship Focus,
June 18-19, Orlando

Securing Florida’s Future...Together

SPECIAL THANKS TO OUR FLORIDA 2030 PARTNERS

PILLAR LEADERSHIP PARTNERS

SUSTAINING PILLAR PARTNERS

For More Information:
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