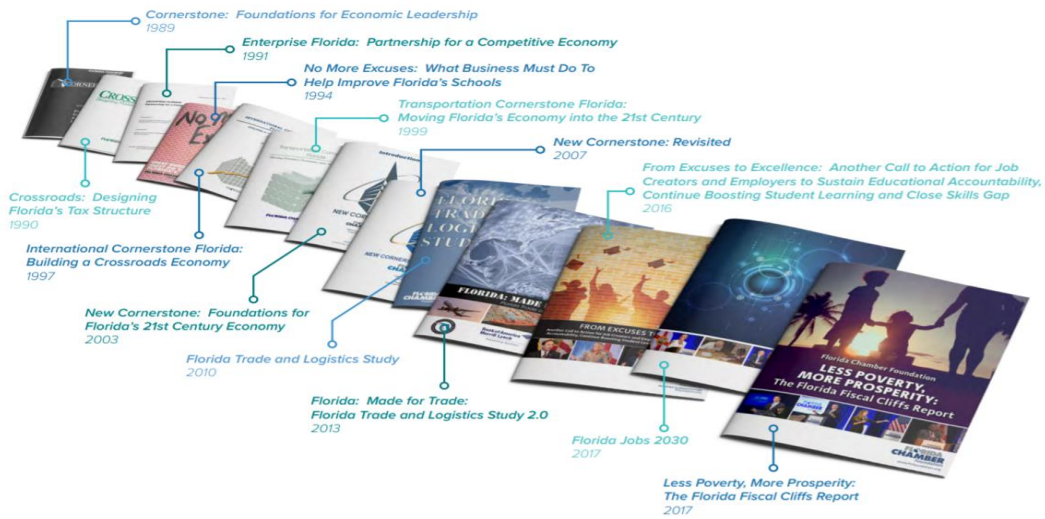
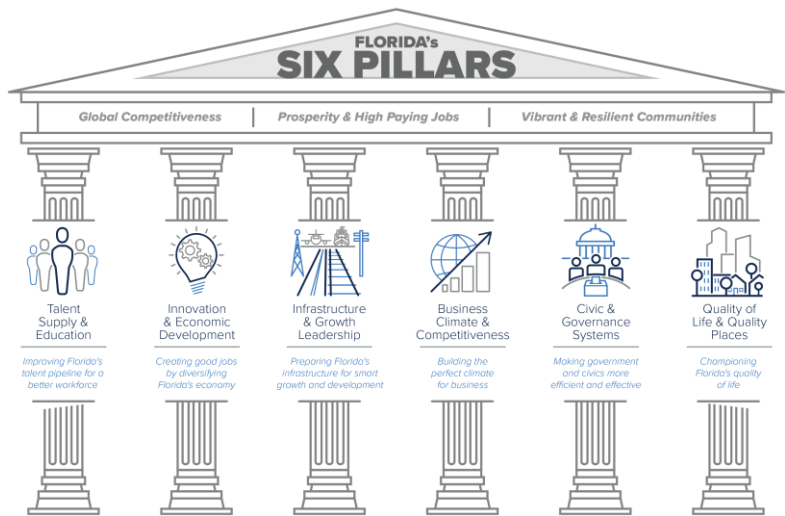


50 Years of Securing Florida’s Future



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



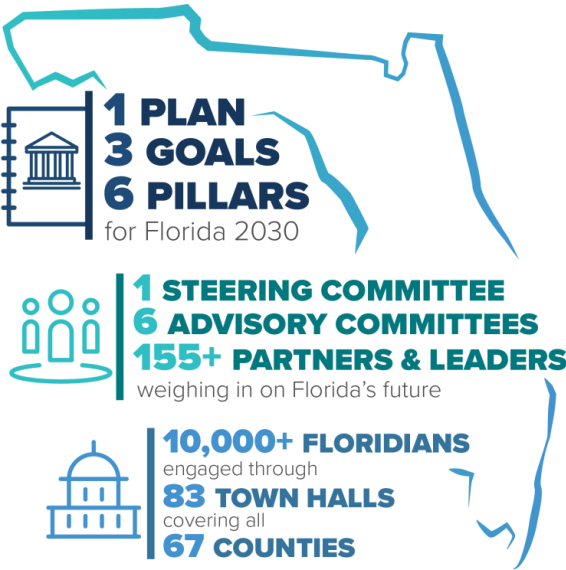
Global Competition
(17th to 10th)


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



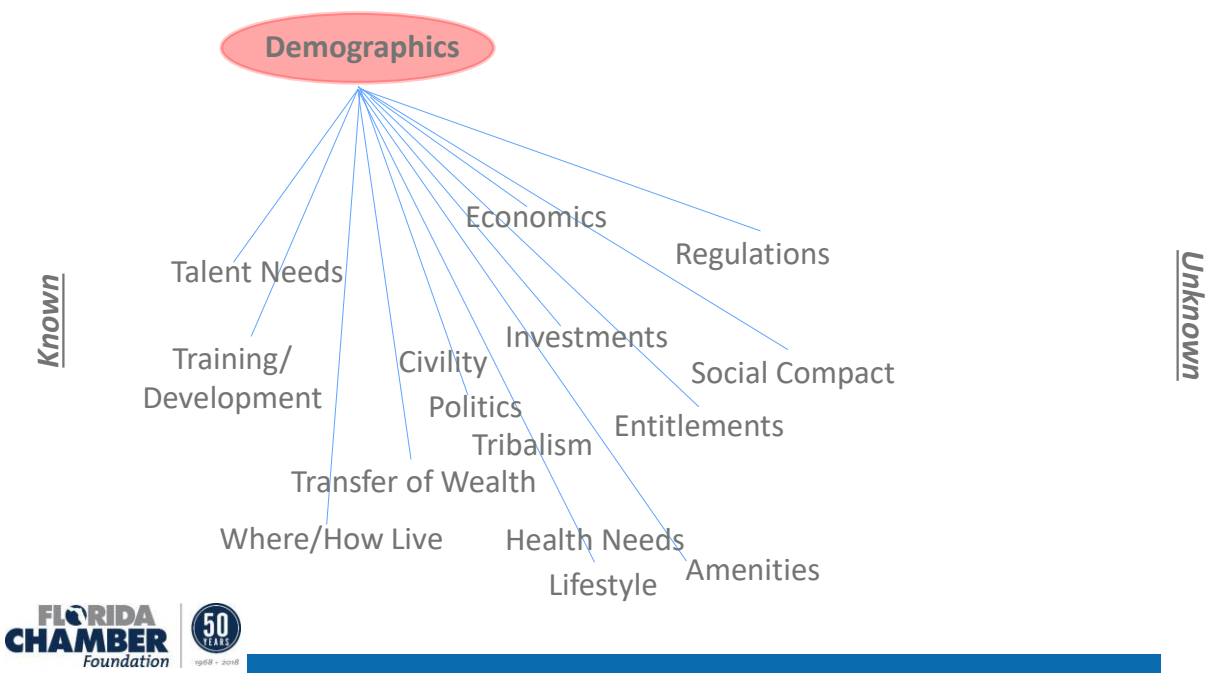
For More Information:

Tony Carvajal, tcarvajal@flfoundation.org



www.Florida2030.org

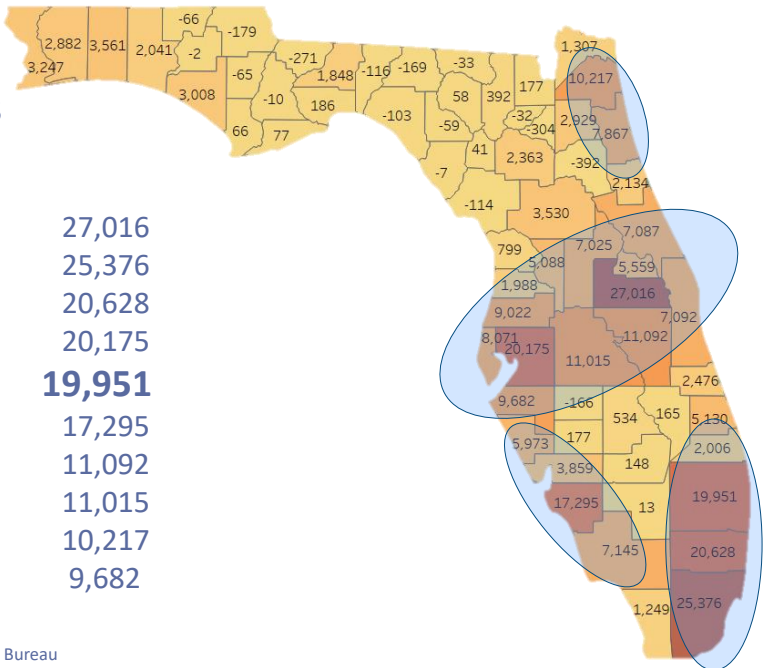




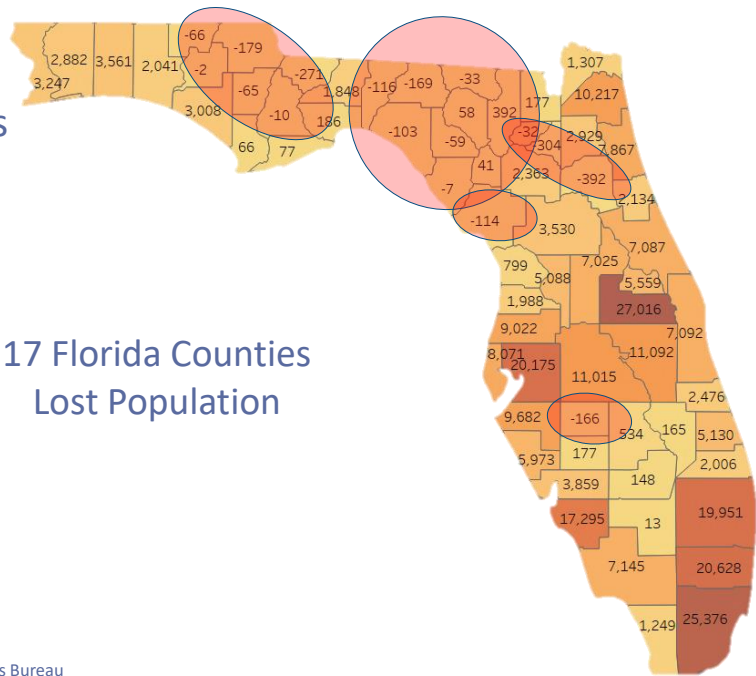
2016 to 2017
Population Changes

Top Counties:

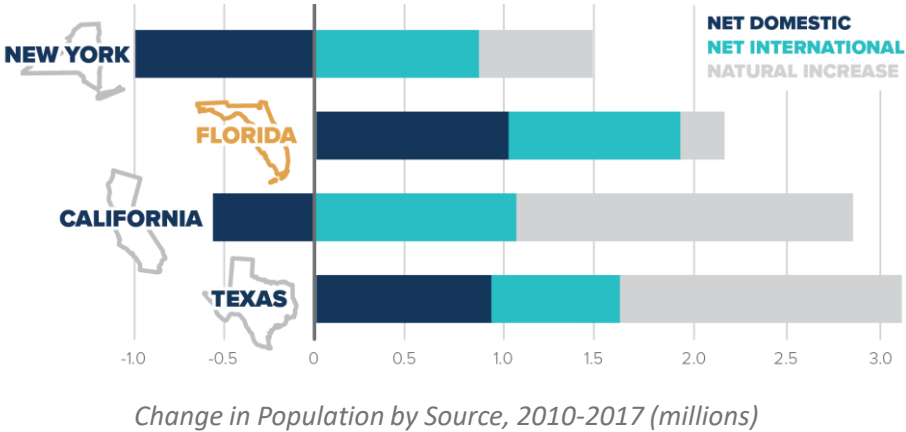
1. Orange	27,016
2. Miami-Dade	25,376
3. Broward	20,628
4. Hillsborough	20,175
5. Palm Beach	19,951
6. Lee	17,295
7. Osceola	11,092
8. Polk	11,015
9. Duval	10,217
10. Manatee	9,682



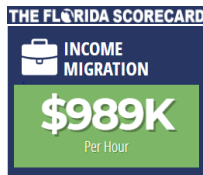
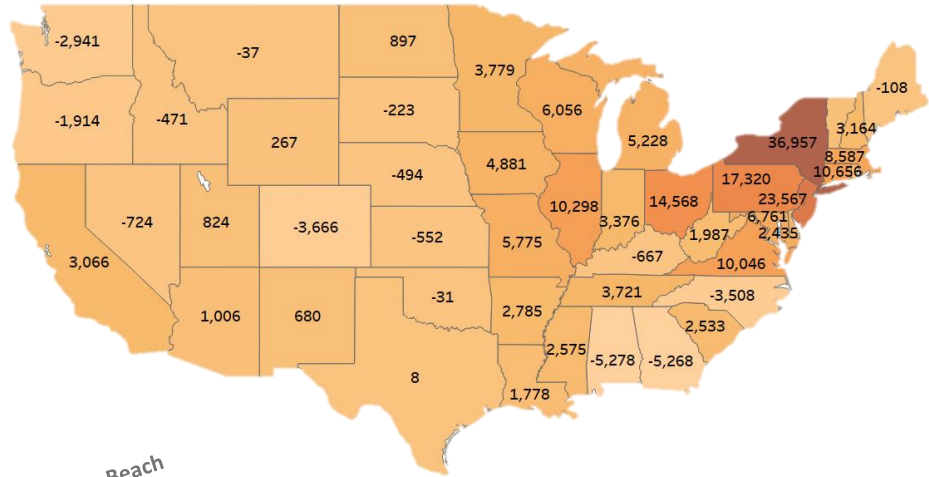
2016 to 2017
Population Changes



Growth



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

Palm Beach
County Ga
\$

\$3.55 billion	Broward County, FL
\$1.57 billion	Nassau County, NY
\$1.55 billion	Fairfield County, CT
\$1.19 billion	Cook County, IL
\$1.12 billion	New York County, NY

\$679.27 million	Martin County, FL
\$566.69 million	St. Lucie County, FL
\$197.73 million	Indian River County, FL
\$162.32 million	Fulton County, GA
\$136.76 million	Marion County, FL

FLORIDA
CHAMBER
Foundation

50
YEARS

1968 • 2018

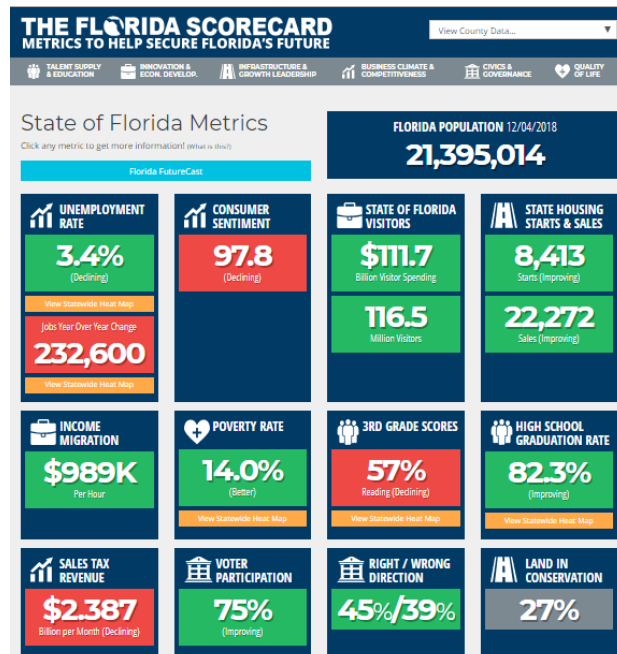
www.theFloridaScorecard.org

Downloadable charts

Data is downloadable

Links to data sources

Free to use

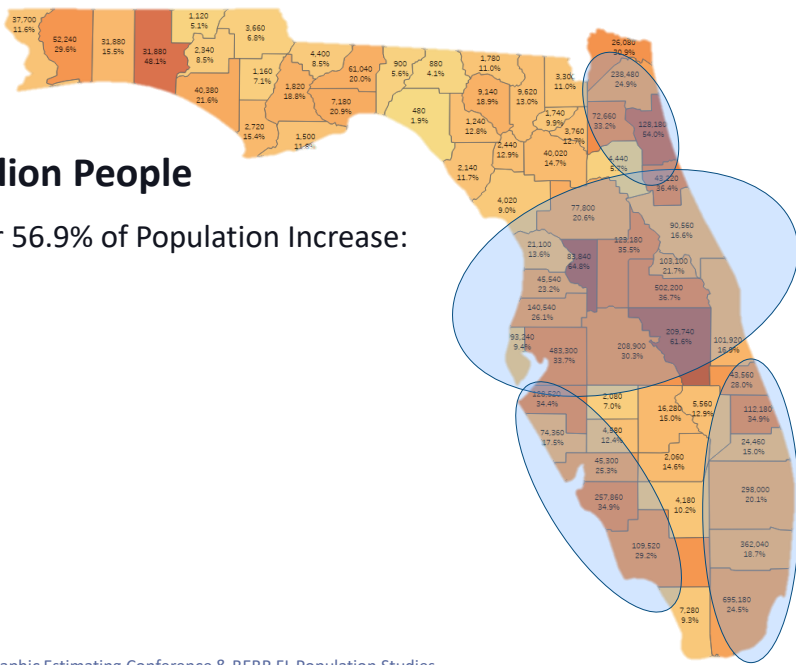


For More Information:
Tony Carvajal, tcarvajal@flfoundation.org

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:

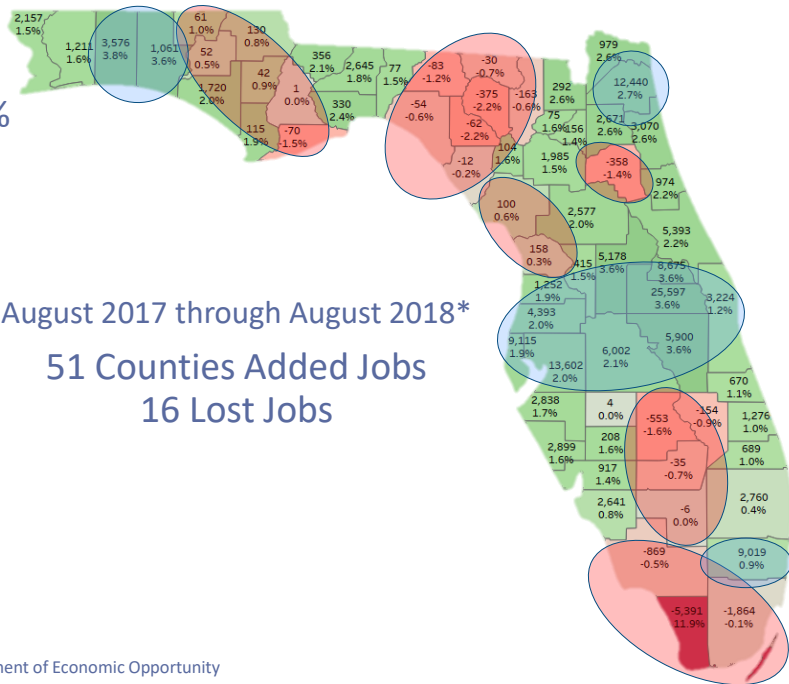
- 1. Orange 25,597
- 2. Hillsborough 13,602
- 3. Duval 12,440

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%

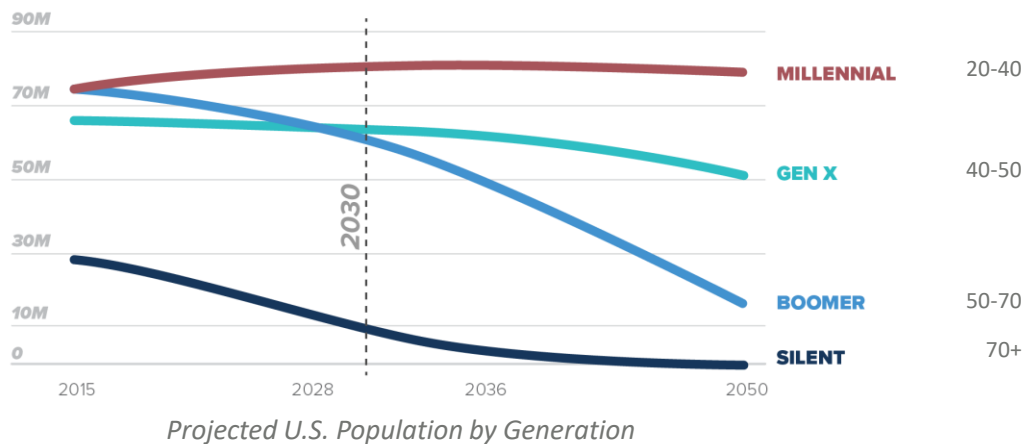
August 2017 through August 2018*

51 Counties Added Jobs
16 Lost Jobs



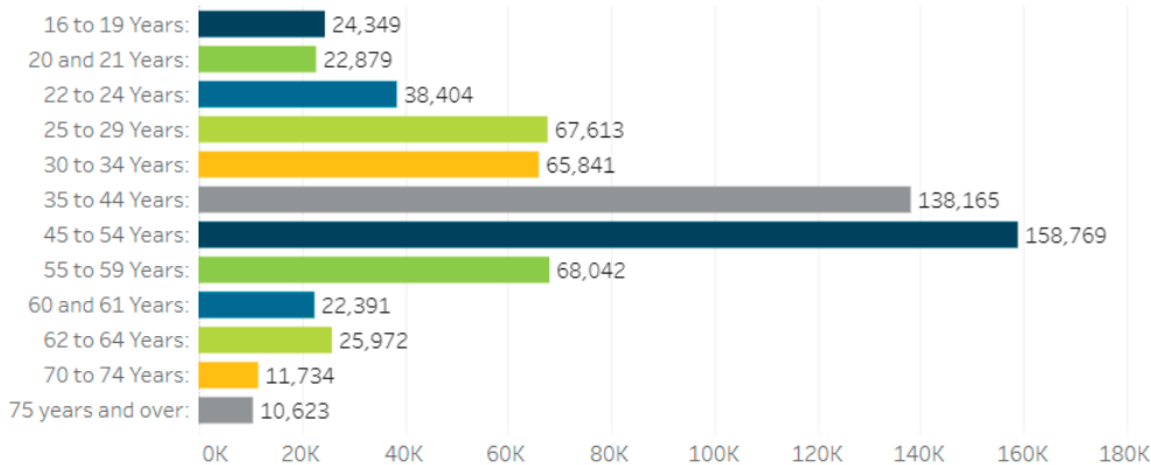
Source: Florida Department of Economic Opportunity

Diversity



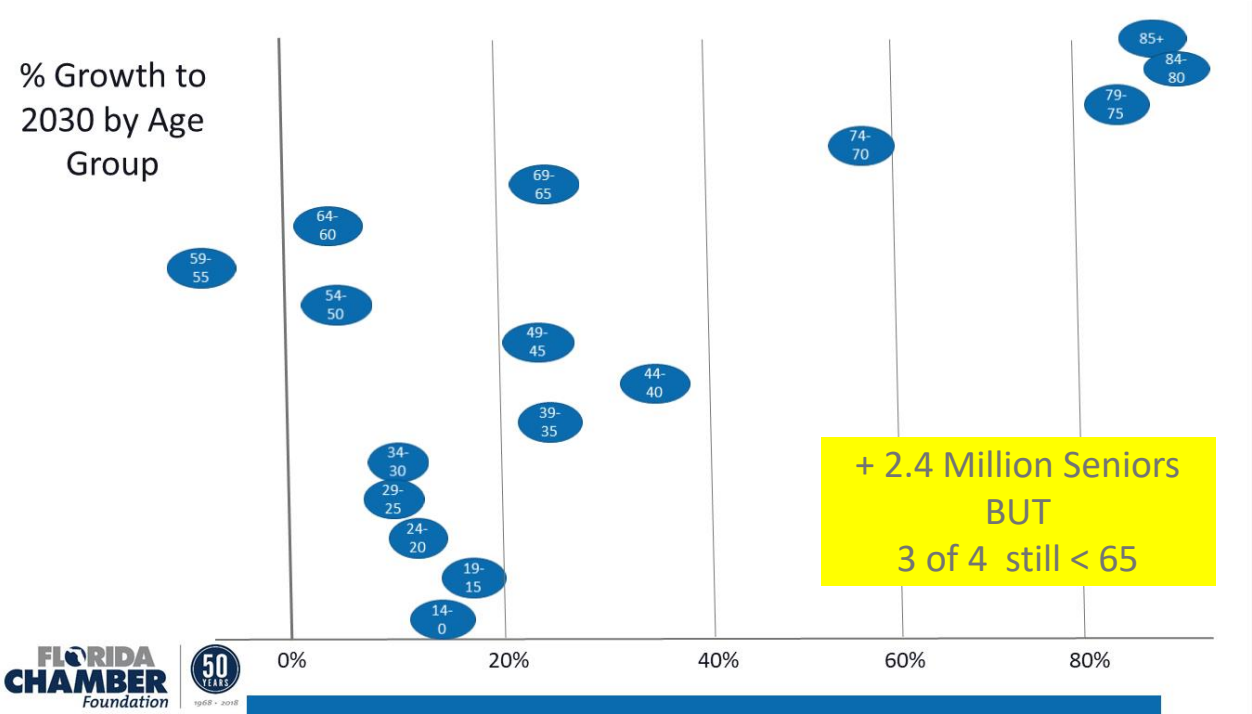
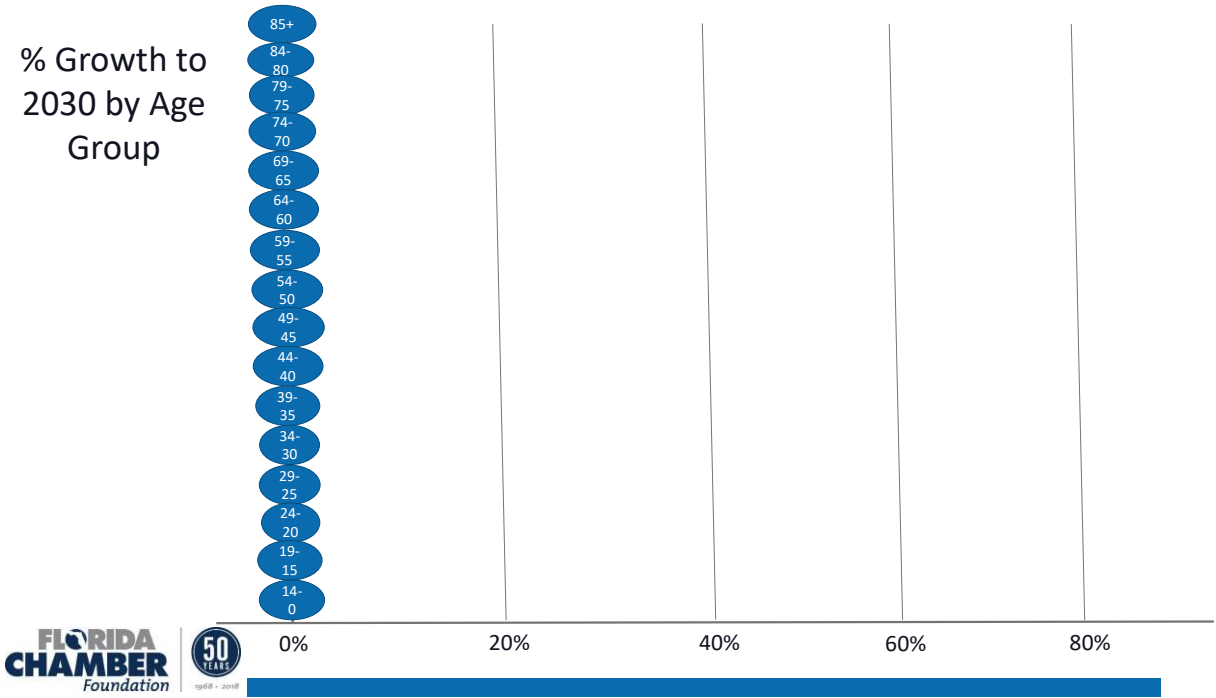
Source: Pew Research Center tabulations of U.S. Census Bureau population projections

Labor Force by Age *



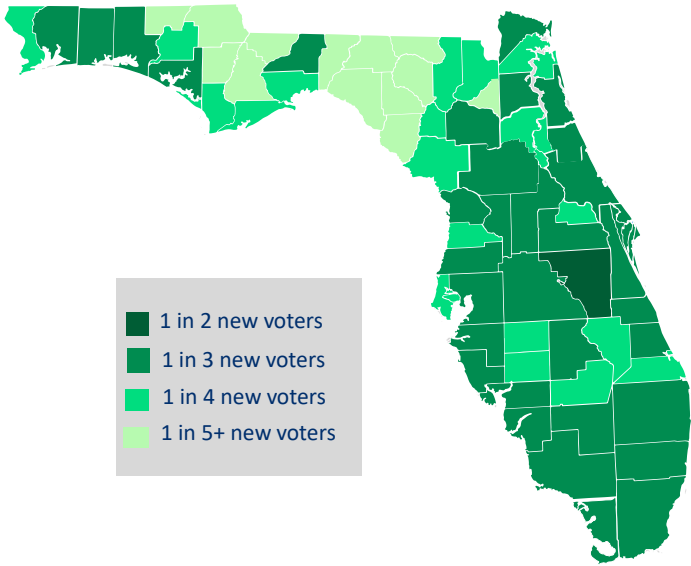
Source: http://lmsresources.labormarketinfo.com/labor_supply/index.html

*CareerSource PBC Region 21

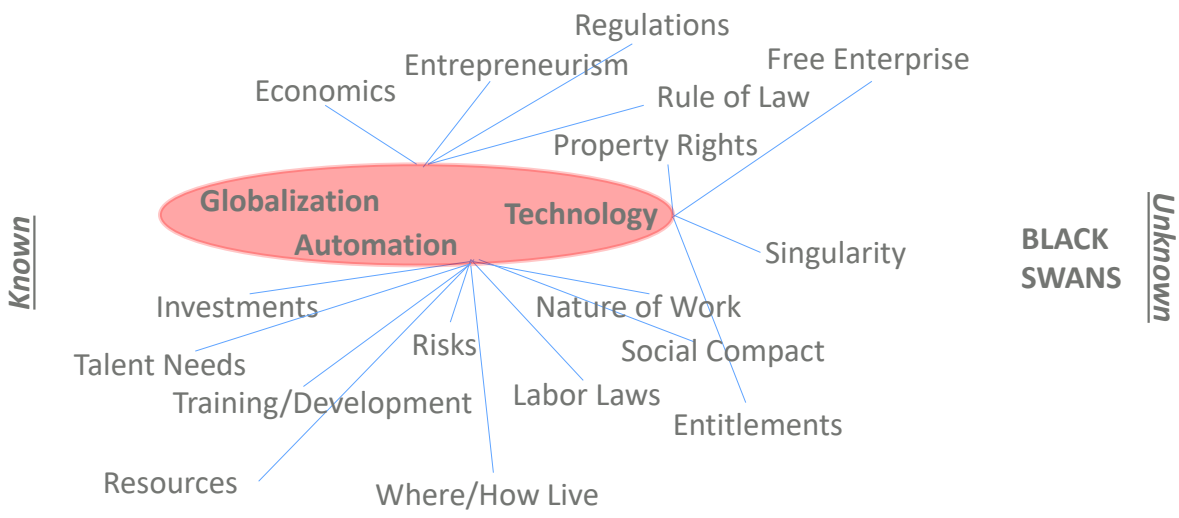


New Voters Since 2010

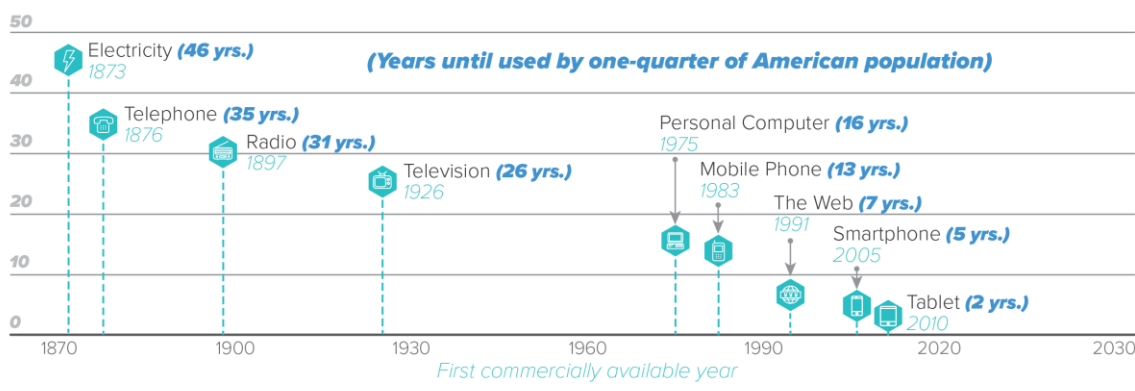
Statewide	4,574,839
Men	2,084,543 (46%)
Women	2,244,901 (49%)
Republicans	1,297,712 (28%)
Democrats	1,508,126 (33%)
NPA/Others	1,769,001 (38%)
White	2,601,405 (57%)
Black	567,957 (12%)
Hispanics	956,304 (21%)



Technology Fueled Disruption Ahead

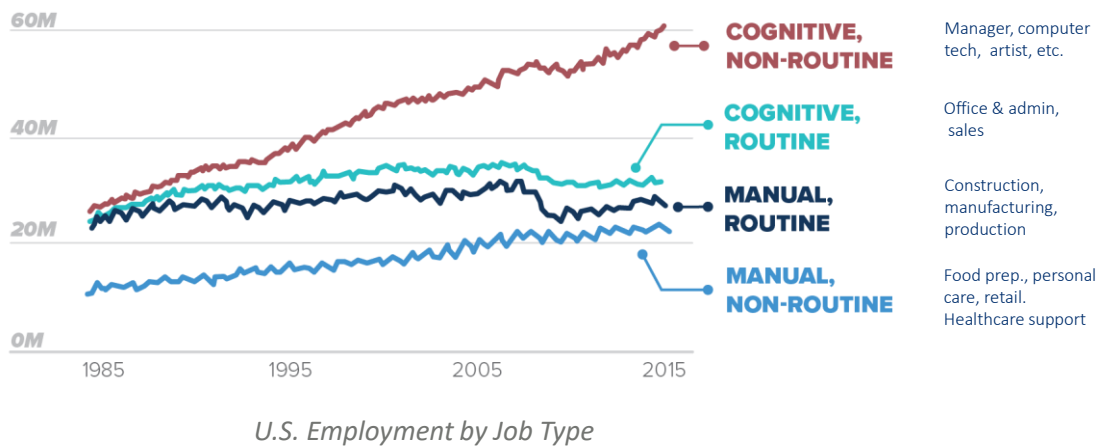


Innovation



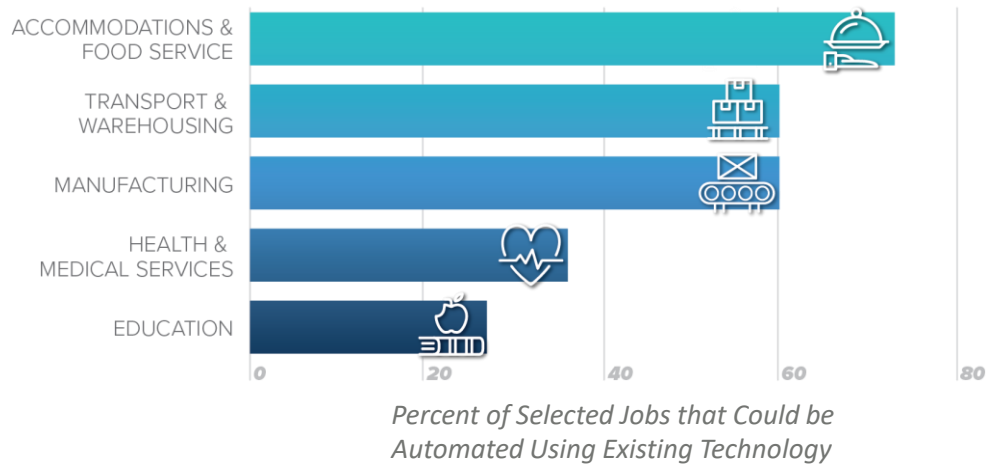
Source: Singularity.com

Nature of Work

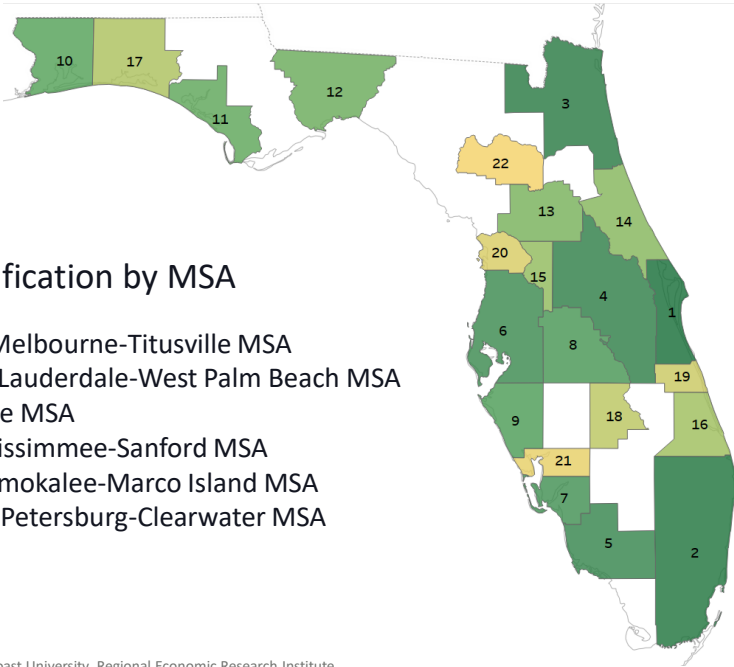


Source: Federal Reserve Bank of St. Louis analysis of Bureau of Labor Statistics occupational data

Nature of Work



Source: McKinsey Global Institute, 2017.



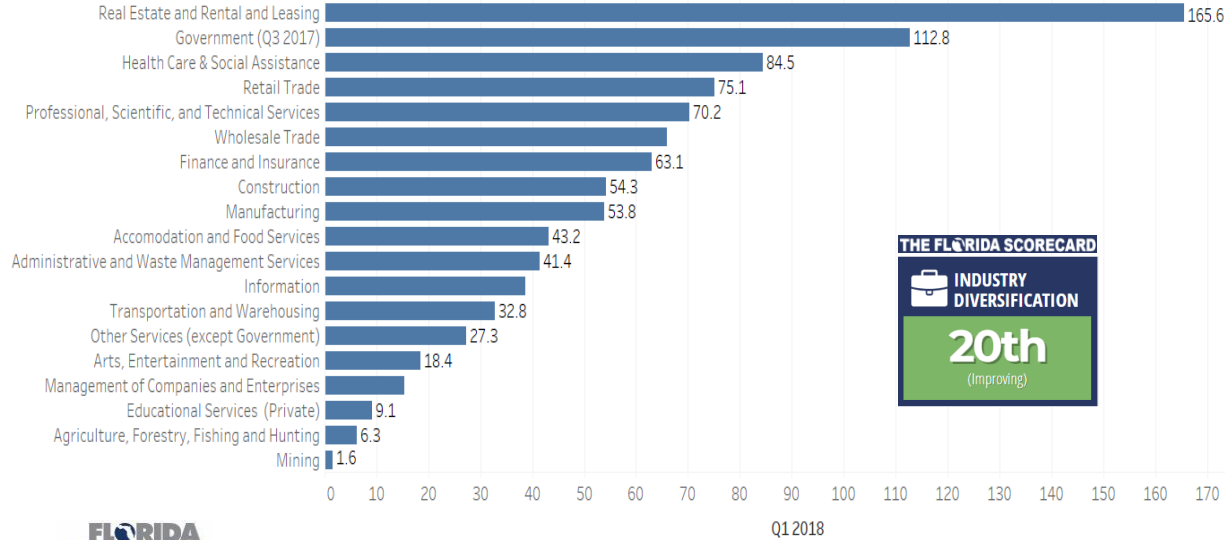
Florida Industry Diversification by MSA

- #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



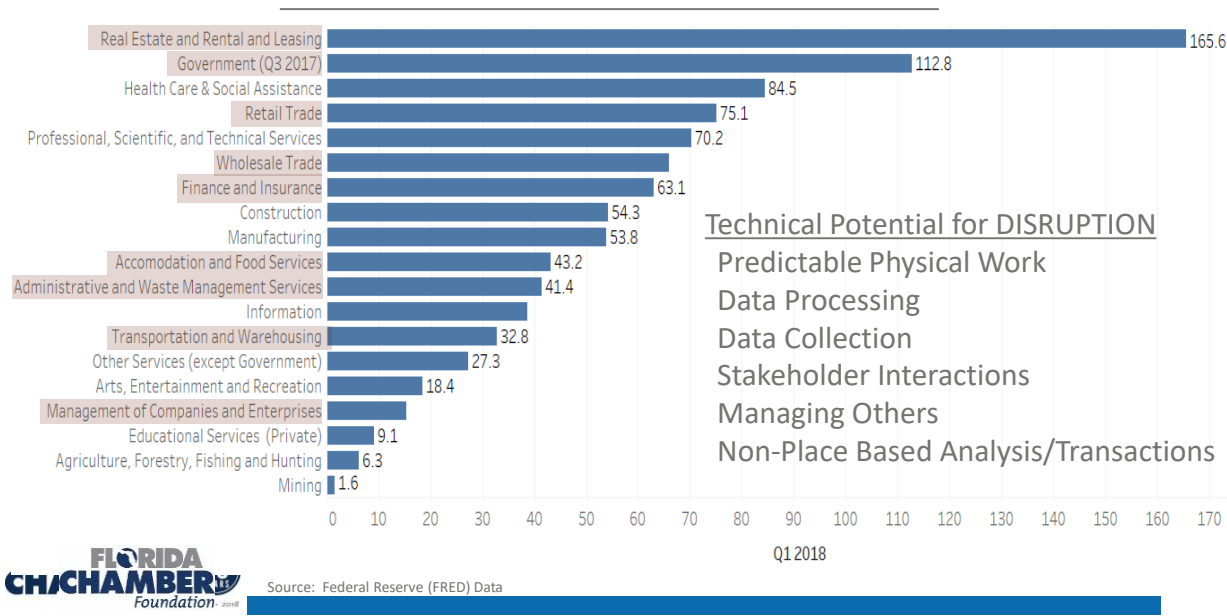
Source: Florida Gulf Coast University, Regional Economic Research Institute

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

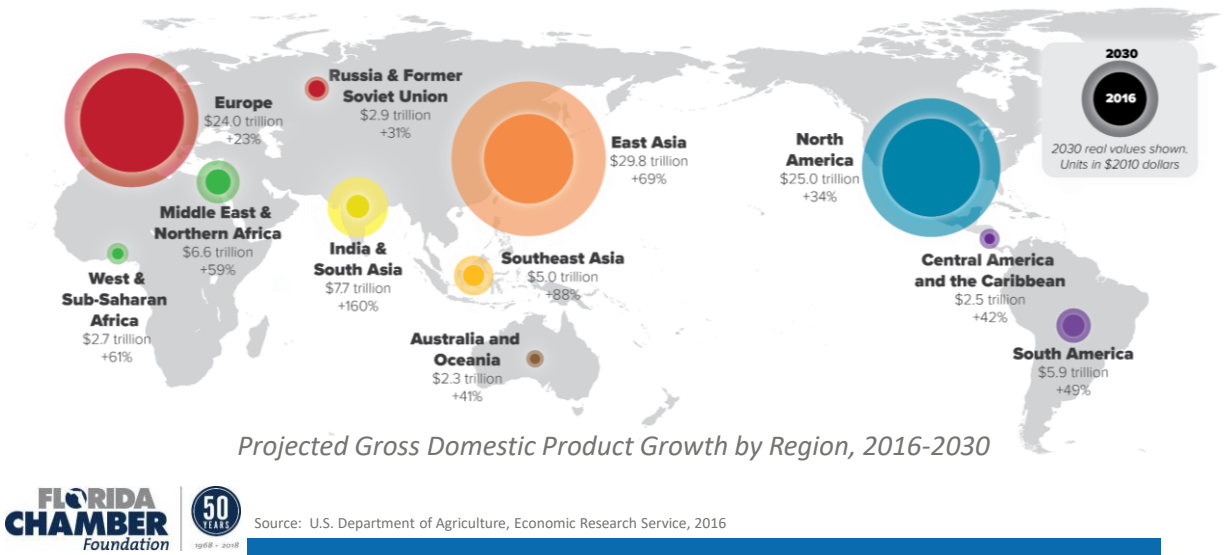


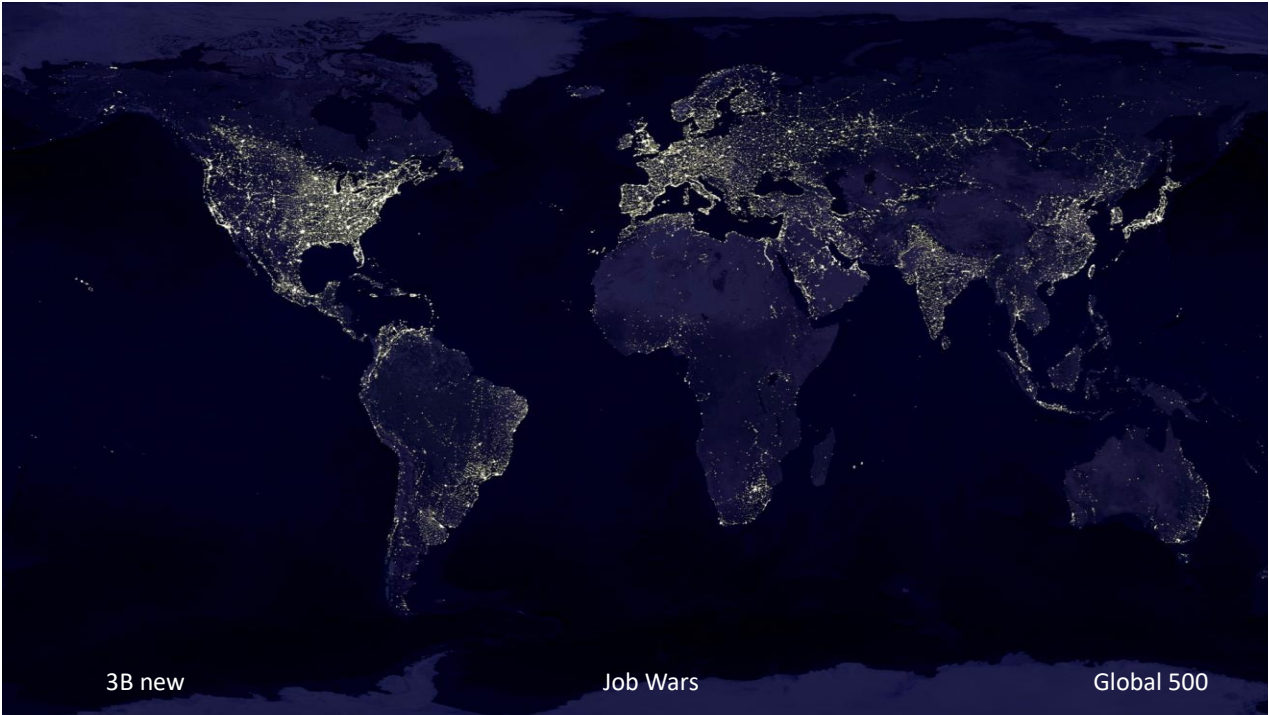
Source: Federal Reserve (FRED) Data

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

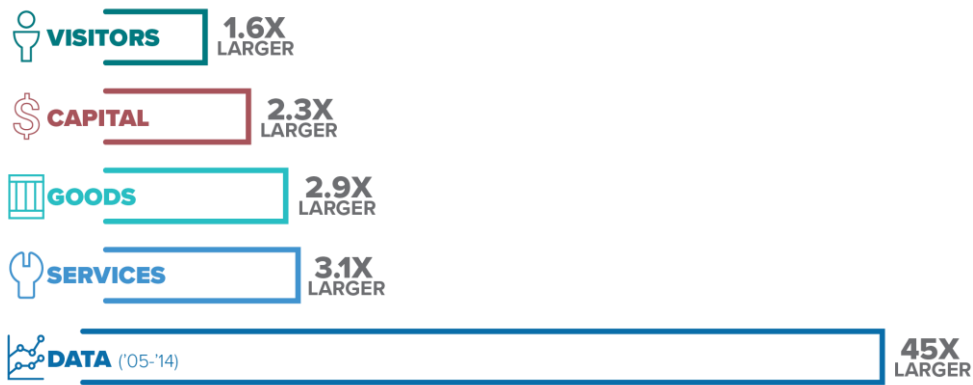


Global Markets





Global Markets



Global Growth in Cross-Border Flows, 2002-2014

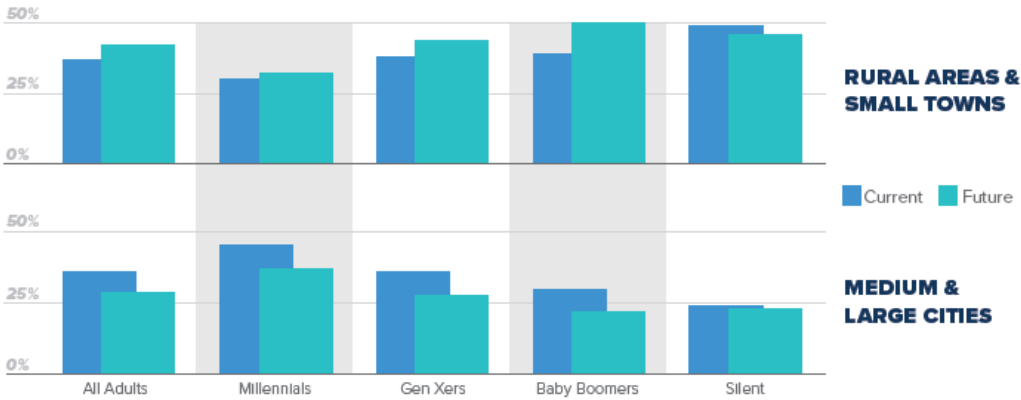


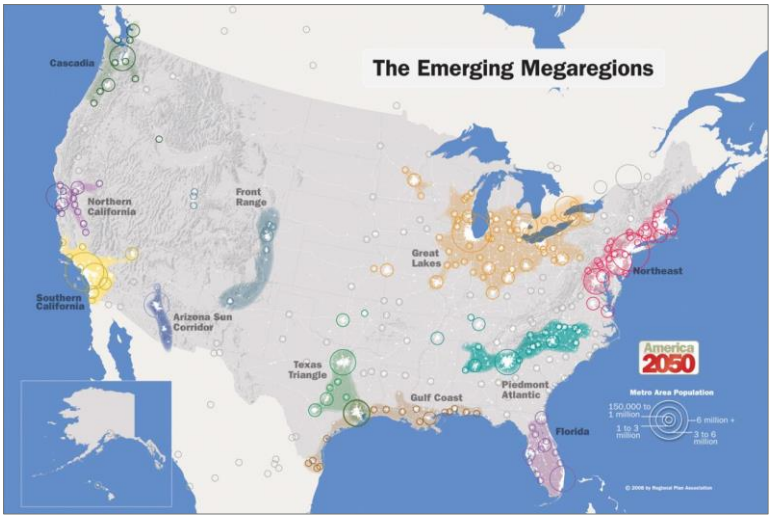
Source: UN World Tourism Organization, UN Conference on Trade and Development, World Bank, International Monetary Fund, TeleGeography, McKinsey Global Institute, Cambridge Systematics analysis



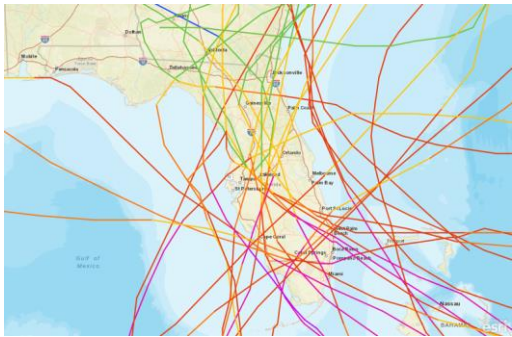
9^{out of} 10
Floridians
live in
urban areas

...and probably
will in 2030 too.

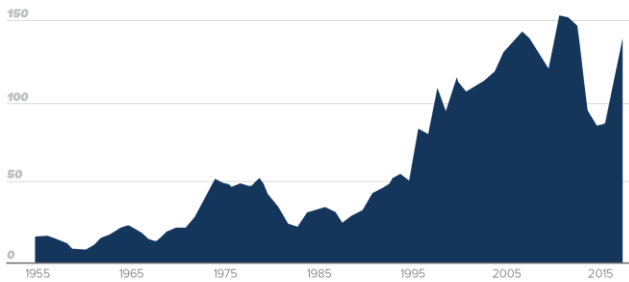




Risk & Resiliency



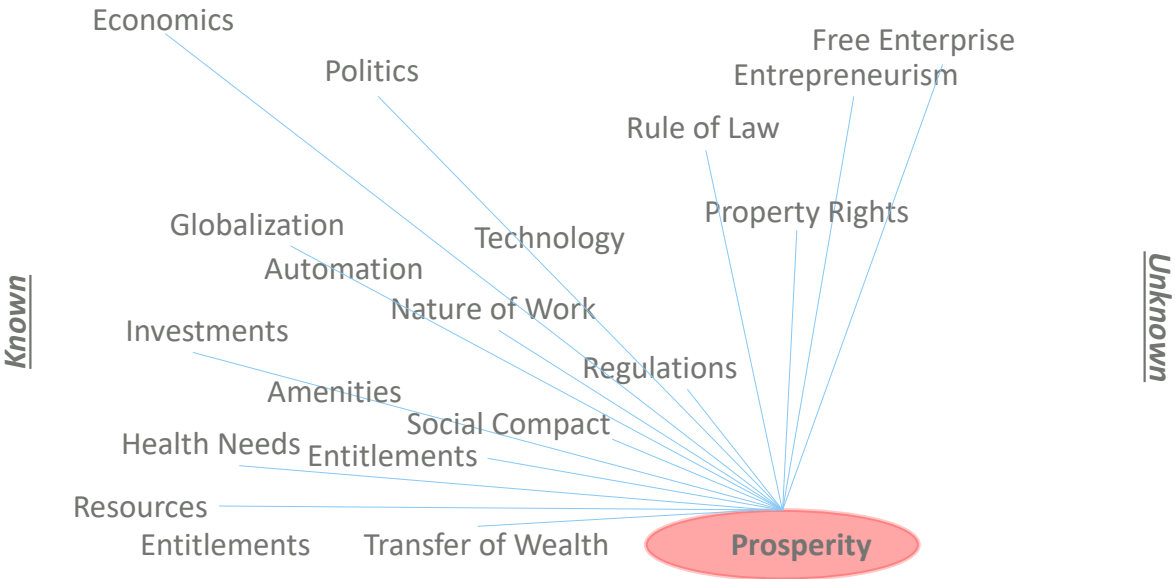
Category 3+ Hurricanes Near Florida, 1854-2017



Declared US. Disasters by Year



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

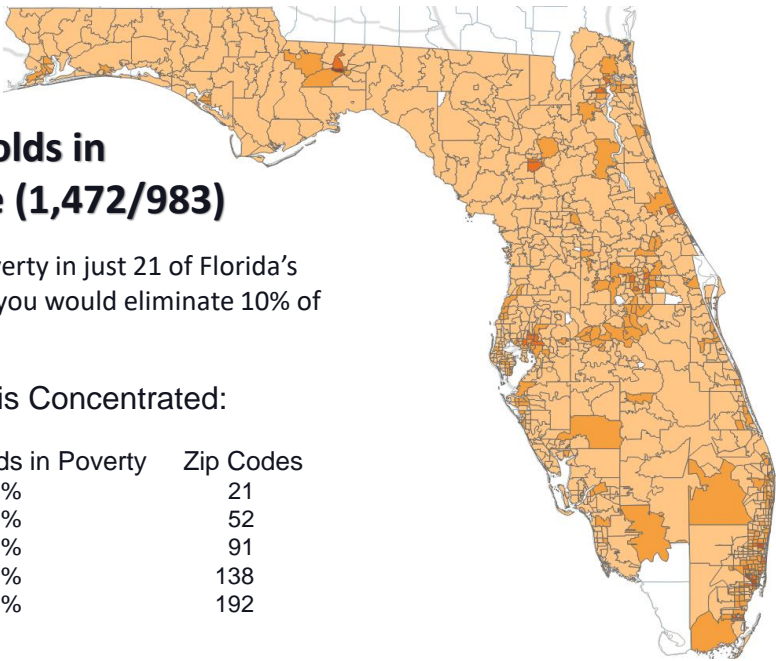


Number of Households in Poverty by Zip Code (1,472/983)

“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”

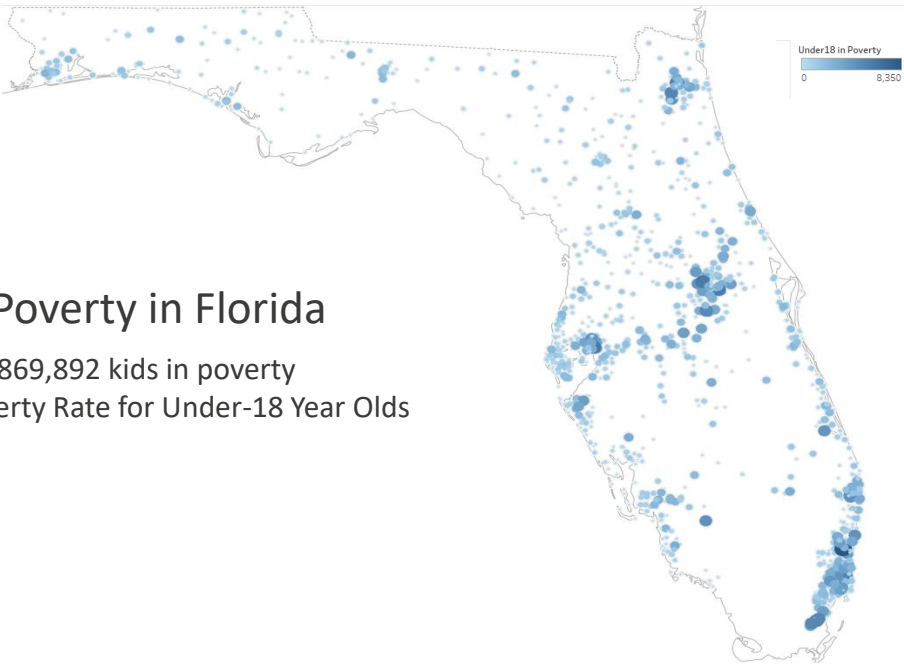
Poverty is Concentrated:

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

Paths To Prosperity and Vibrant & Resilient Communities

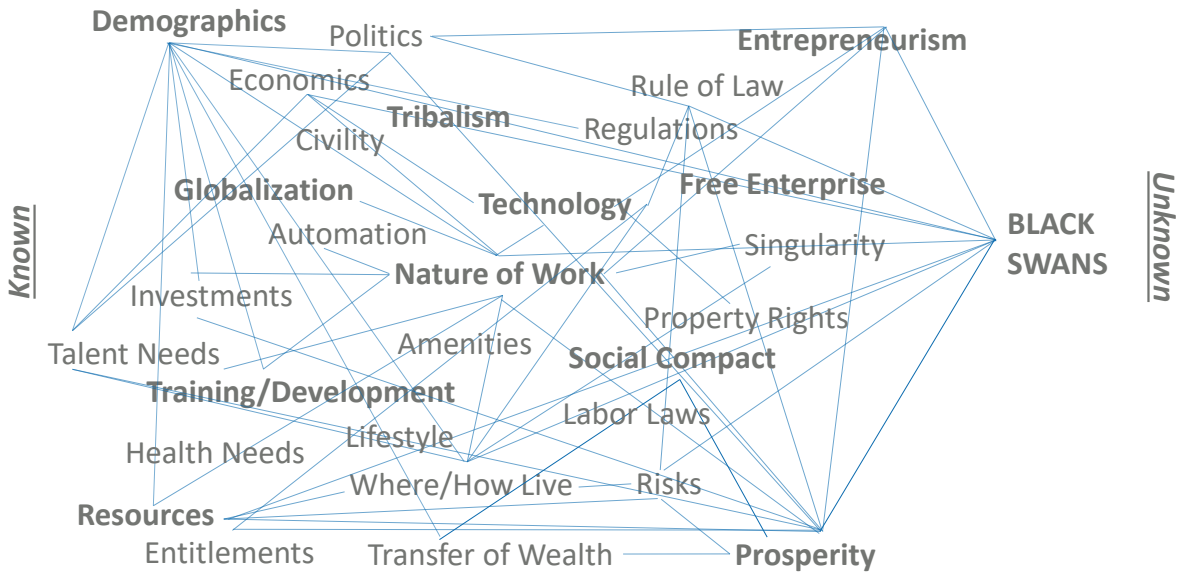


- ROOT CAUSES
- Jobs
 - Education
 - Housing
 - Transportation
 - Health
 - Food Security
 - Child & Family Care
 - Safety
 - Justice
 - Agency




www.FloridaChamber.com/ProsperityInitiative


Web of Collisions








**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



SPONSORED REPORT

Strategic Thinking about Florida's Future

How Florida CEOs see the state's future shaping up.

Planning for Connectivity
Moving forward for rapid & secure transportation solutions is a growing priority. There is a growing consensus among business leaders that connectivity is a critical component of a state's economic future. The state's infrastructure is aging, and there is a need for a comprehensive plan to address the challenges of a growing population and a changing economy. The state's transportation system is a key factor in its economic success, and it is essential to invest in it to ensure a bright future for the state.

Water is Key
Water is a critical resource for Florida, and it is essential to ensure its availability and quality. The state's water resources are under increasing pressure from a growing population and a changing climate. It is essential to invest in water infrastructure to ensure the state's water supply for the future.

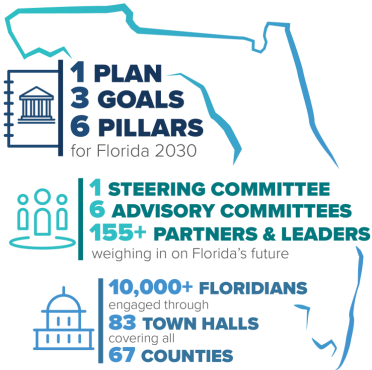
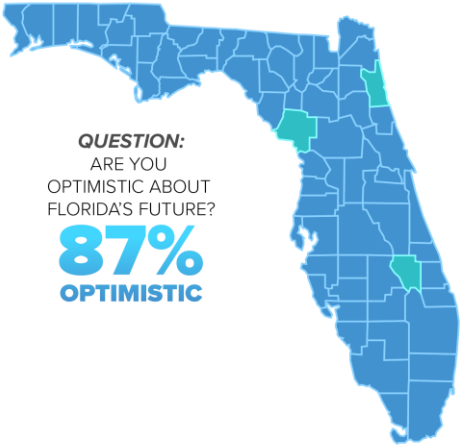
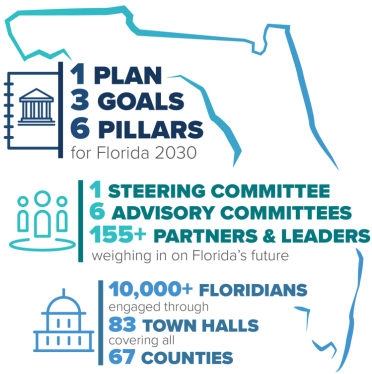
Notes for Our Next Governor
As we approach the 2020 election, it is essential to consider the challenges and opportunities that will face the next governor. The state's economic future is at stake, and it is essential to have a clear vision and a plan to address the challenges of the future.


Fundamental Strengths
The state's fundamental strengths are its location, its climate, and its talent. These strengths are the foundation of the state's economic success, and it is essential to invest in them to ensure a bright future for the state.

A Warning Climate
Climate change is a growing threat to the state's future. It is essential to take action to address the challenges of climate change to ensure the state's economic and environmental future.

Talent is Key
Talent is a critical resource for the state, and it is essential to ensure its availability and quality. The state's talent pool is under increasing pressure from a growing population and a changing economy. It is essential to invest in talent development to ensure the state's economic future.

Florida Chamber Foundation
50 YEARS
1968 - 2018








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

	GETTING WORSE	IMPROVING
STRENGTH	<ul style="list-style-type: none">PUBLIC SAFETYTRANSPORTATIONWATER INFRASTRUCTURE	<ul style="list-style-type: none">ARTS, CULTURE, HERITAGE & SENSE OF PLACEHEALTH & WELLNESS
WEAKNESS	<ul style="list-style-type: none">ECONOMIC DEVELOPMENTRESPONSIVENESS OF GOVERNMENTAFFORDABILITY OF HOUSING	<ul style="list-style-type: none">TALENTBUSINESS CLIMATE REGULATIONSECONOMIC PROSPERITY

Summary of input from 83 town hall meetings engaging more than 10,000 Floridians in all 67 counties

FLORIDA

CHAMBER

Foundation

50

YEARS

1968 - 2018

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

	Getting Worse	Improving
Strength	<ul style="list-style-type: none">Public SafetyTransportationWater Infrastructure	<ul style="list-style-type: none">Arts, Culture, Heritage & Sense of PlaceHealth & Wellness
Weakness	<ul style="list-style-type: none">Economic DevelopmentResponsiveness of GovtAffordability of Housing	<ul style="list-style-type: none">TalentBusiness Climate- RegulationsEconomic Prosperity

FLORIDA

CHAMBER

Foundation

50

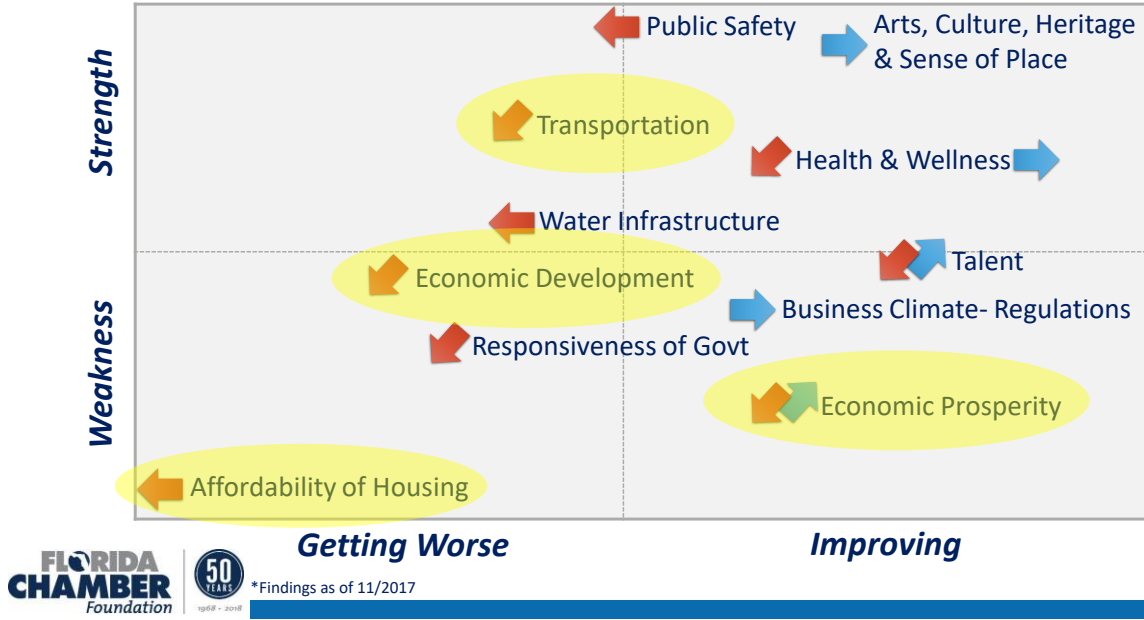
YEARS

1968 - 2018

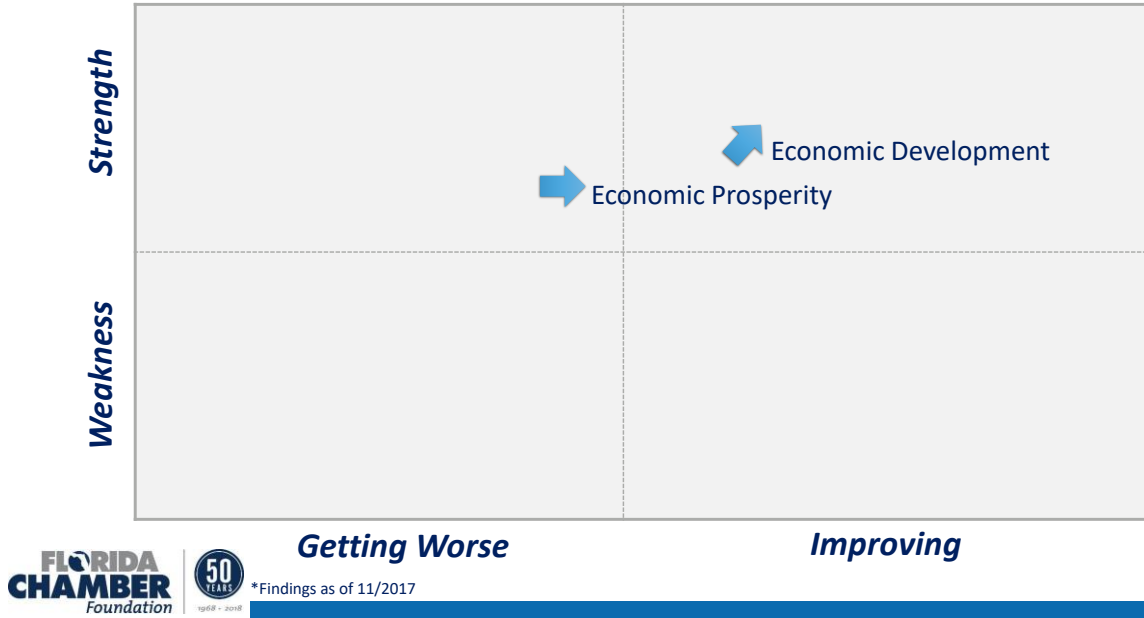
*Findings as of 11/2017

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

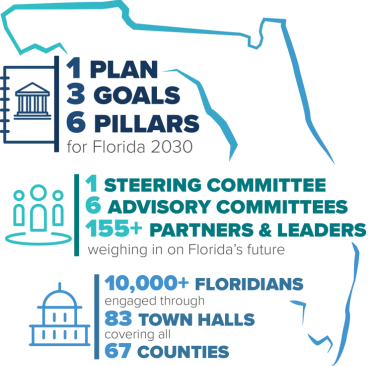
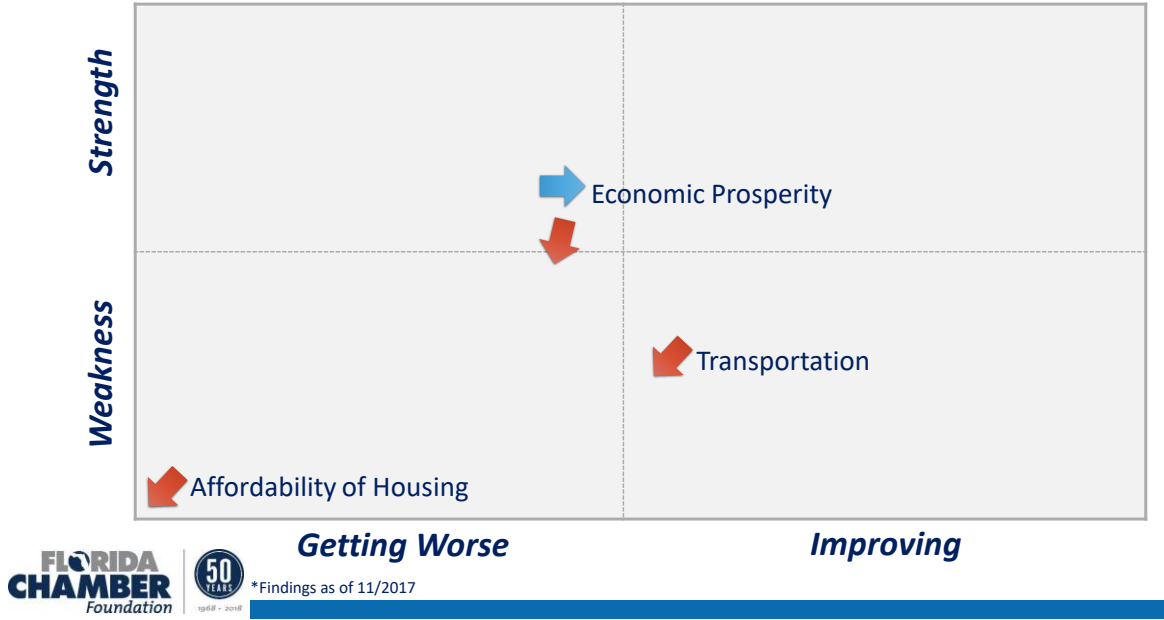
Summary of Town Hall Findings, Where Palm Beach Differed



How PALM BEACH Differed – BETTER than State Composite



How PALM BEACH Differed – WORSE than State Composite

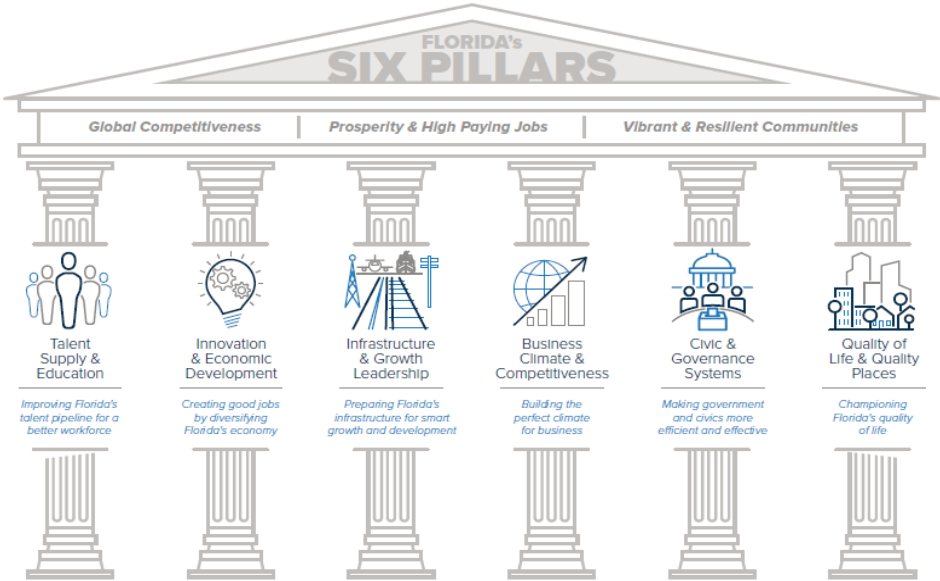


Coordinates



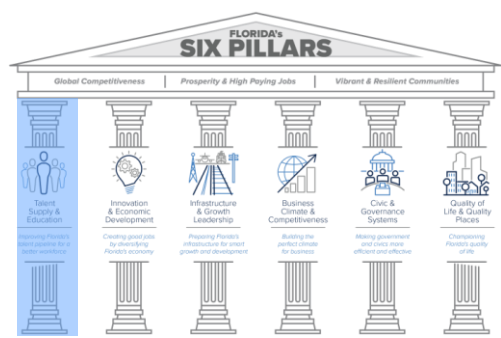
Help secure Florida's future at
Florida2030.org

Track Florida's progress at
TheFloridaScorecard.org



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Florida2030.org

Track Florida's progress at
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
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)



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

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

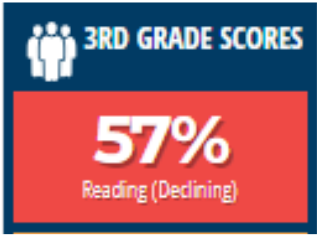
95% of entering **high school students graduate within 4 years**

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

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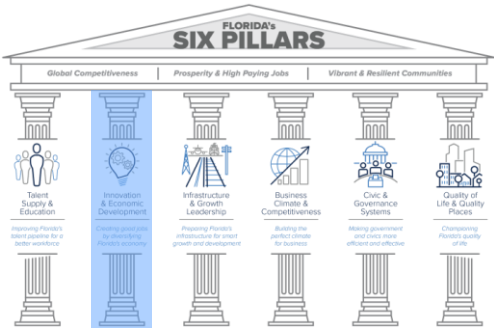
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100% of children are **ready for kindergarten**



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

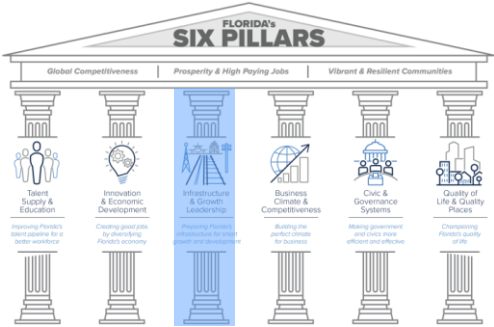


Creating Good Jobs by Diversifying Florida's Economy



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**

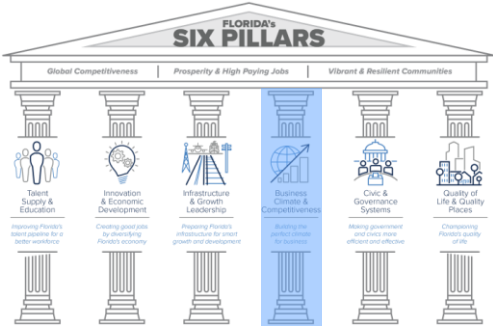
All major population and economic centers connected to regional, national, and global markets by **high-capacity corridors**

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

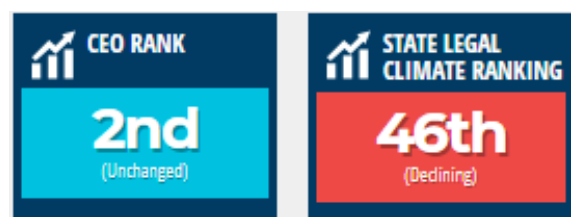
- Tax & Regulatory Costs
- Property Rights
- Managing Risks
- Legal Climate

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**

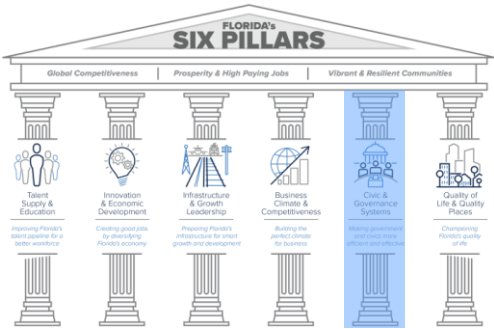
#1 business tax climate in the nation

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

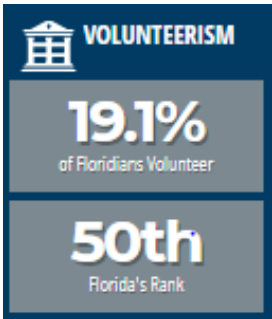
- Florida’s Budget
- Government Systems
- Federal Issues
- Local Government Issues
- Regional Stewardship
- Public/Private Partnerships
- Ethics & Elections
- Florida's Constitution
- Civic Infrastructure

Making Government & Civics More Efficient & Effective



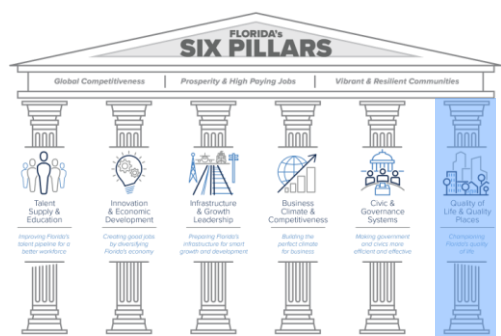
- 100% of state agencies aligned with Florida 2030 goals
- 100% of regional economic development plans aligned with Florida 2030 goals
- 100% of Florida residents covered by regional visioning processes
- Increased size and impact of nonprofit and philanthropic sectors
- Doubling the rate of Floridians 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

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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



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"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

Track Florida's progress at
TheFloridaScorecard.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

**FLORIDA
CHAMBER**
Foundation

Securing Florida's Future...Together

FLORIDA2030

FLORIDA CHAMBER FOUNDATION

SPECIAL THANKS TO OUR FLORIDA 2030 PARTNERS

PILLAR LEADERSHIP PARTNERS



FPL



PUBLIX SUPER MARKETS
CHARITIES



DUKE
ENERGY



EDYTH BUSH
CHARITABLE FOUNDATION



JM FAMILY
ENTERPRISES, INC.



Helios
Education Foundation



Bank of America
Merrill Lynch



CareerSource
FLORIDA



Gulf Power



THE
CORRIDOR



PRMA
New Markets, New Ways



WELLS
FARGO



Florida Blue
In the pursuit of health



GEO
The GEO Group Foundation, Inc.



Holland & Knight



LOCKHEED MARTIN



VECELLIO
GROUP, INC.

SUSTAINING PILLAR PARTNERS



at&t



AutoNation



AMERICAN
SBDC



BEALLS



CHAMBER of COMMERCE
of the PALM BEACHES



ORLANDO
ECONOMIC
PARTNERSHIP



DEAN
MEAD



DUDA



Fisher
Phillips



FLORIDA
CRYSTALS



Inga



Florida Realtors



GULF COAST
COMMUNITY
FOUNDATION



JAXCHAMBER



KEISER
UNIVERSITY



KITSON



PNC



REGIONS



DON JOY



RS&H



SACHS MEDIA
GROUP



Stantec



State Farm



TECO



UNIVERSITY of
FLORIDA



UFHealth



U.S. SUGAR



Utilities, Inc.



Weyerhaeuser

ANNUAL PILLAR PARTNERS



ABLE



CHARITABLE
FOUNDATION



Pinellas



FIFTH THIRD BANK



Palm Beach
COLLEGE SYSTEM
FOUNDATION



Moore
Communications
Group



C