



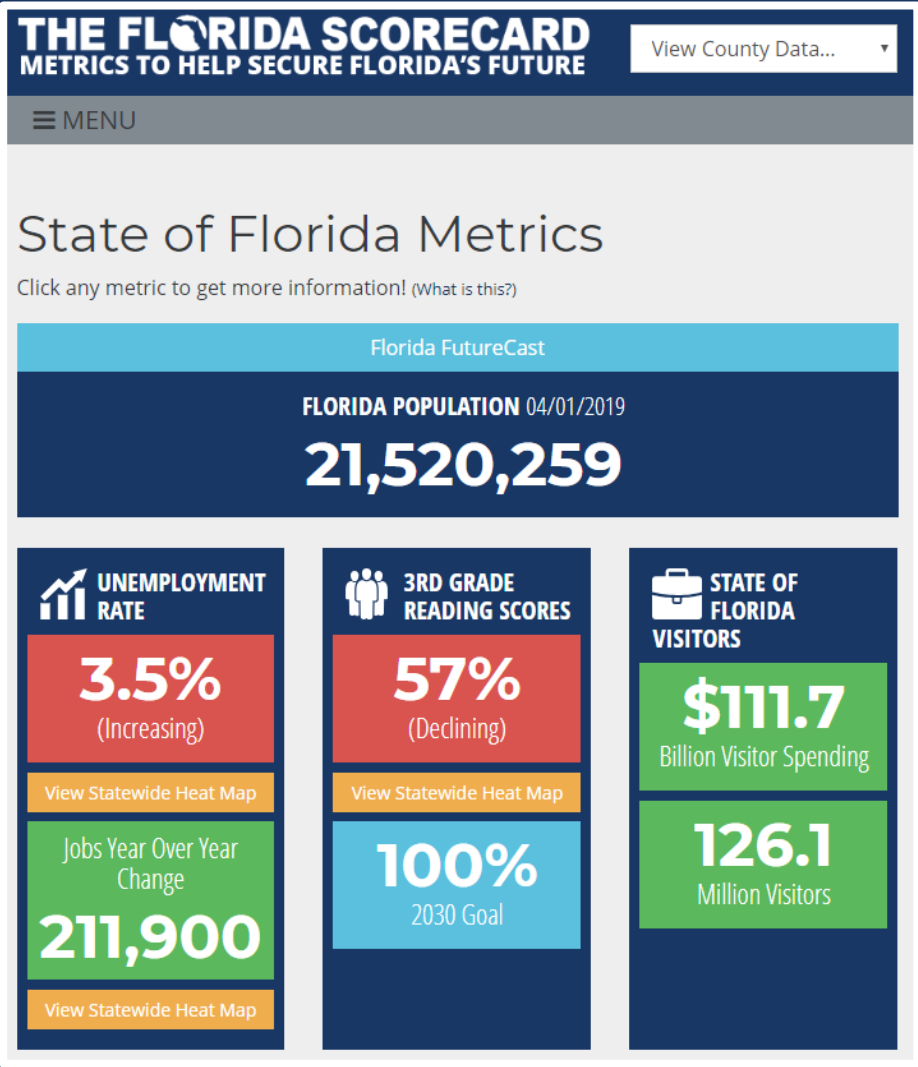
|Uniting Business for Good

Florida's Changing Economic, Demographic & Political Landscape and Why Business Matters

Uniting Business For Good



Solutions (Research)

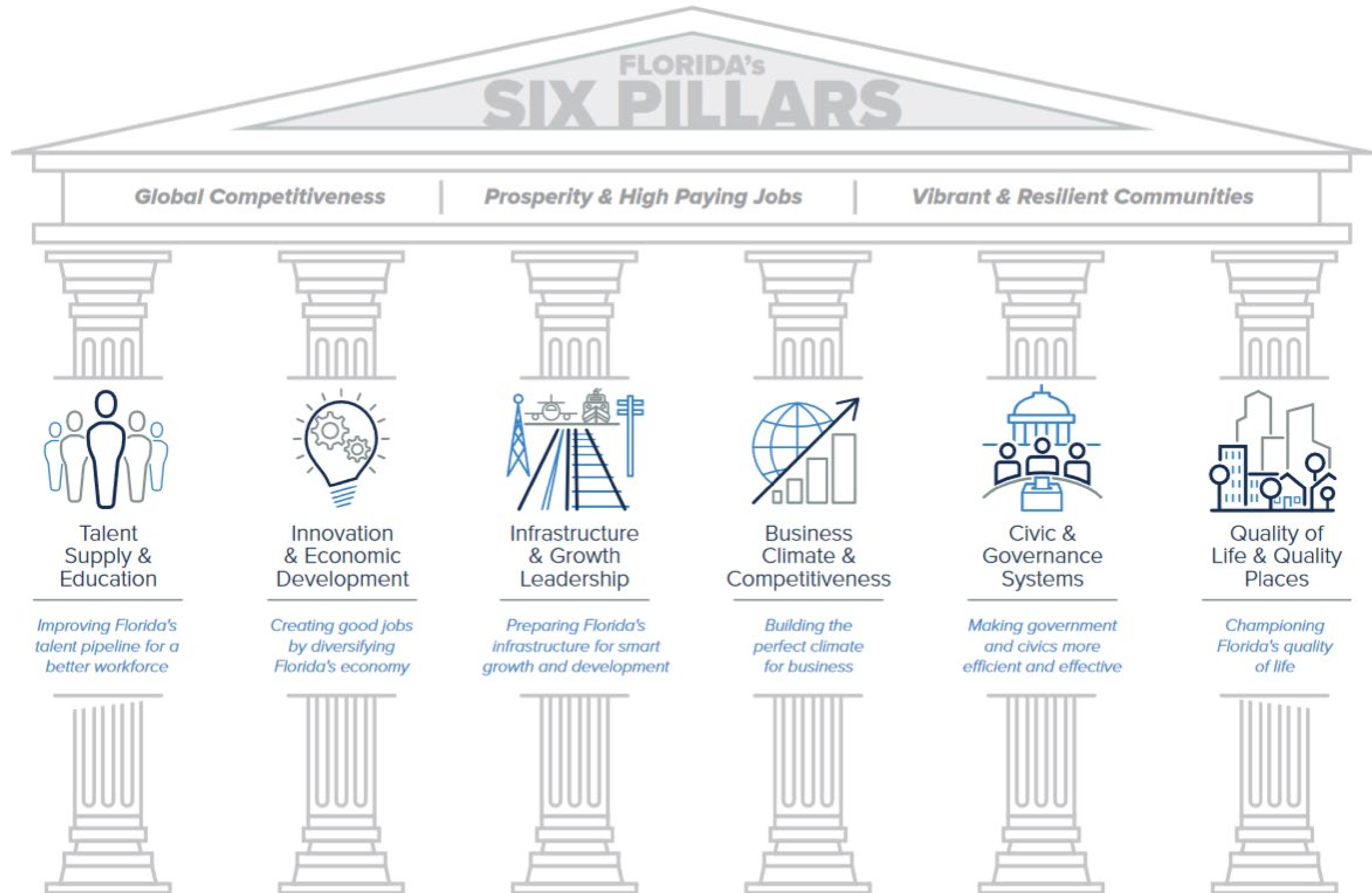


Actions (Lobbying & Grassroots)



Leadership (Elections)





A man in a suit and tie, Mark Wilson, is speaking at a podium. Behind him is a Florida state flag and a large presentation board titled "THE FLORIDA ECONOMIC DEVELOPMENT BOARD". The board displays various economic statistics for the State of Florida, including unemployment rates, population, and economic indicators. The background is a deep blue color.

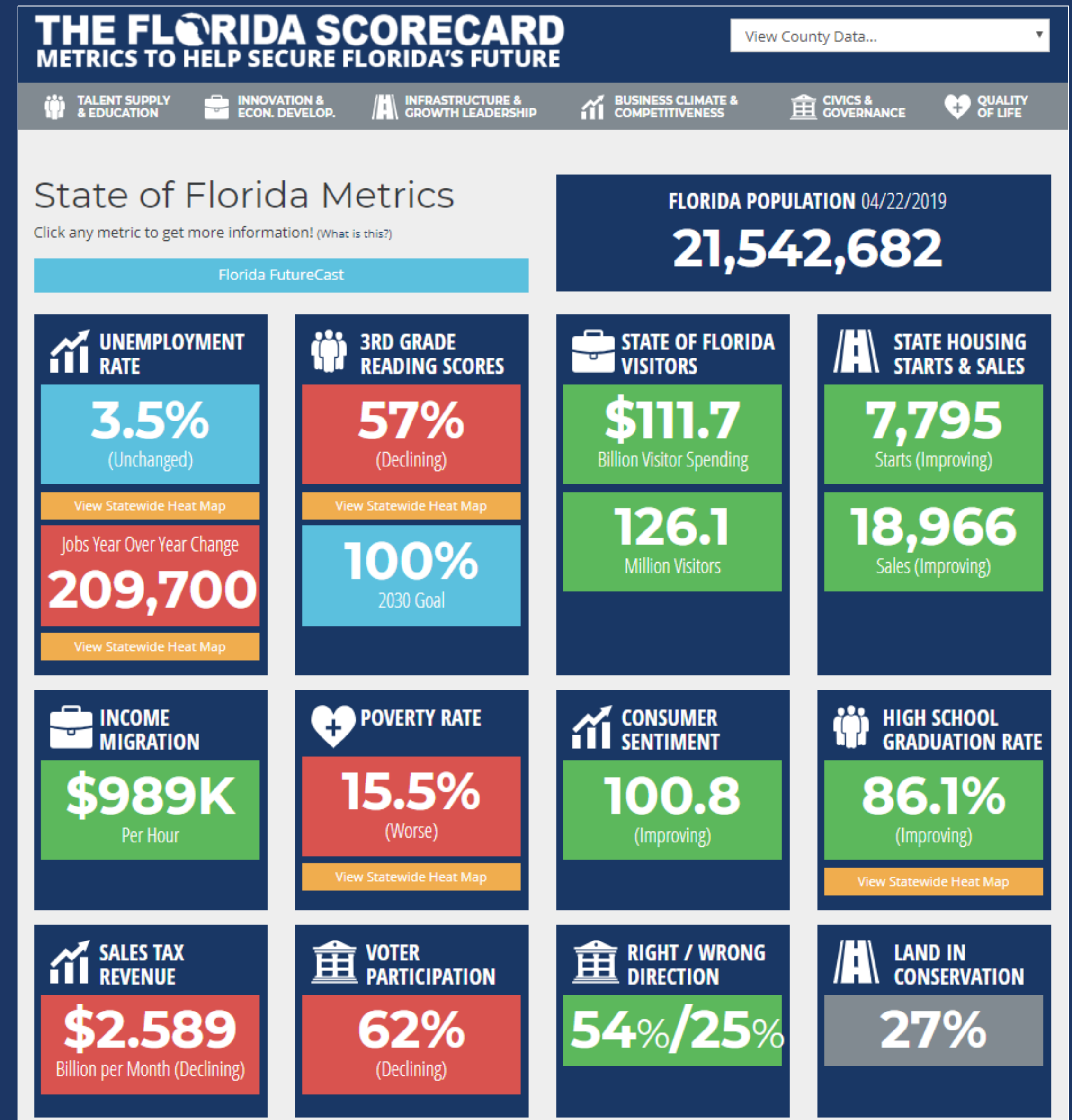
“Florida is changing. Our ECONOMICS, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson

“Our mission is to lead Florida to a new and sustainable economy.”

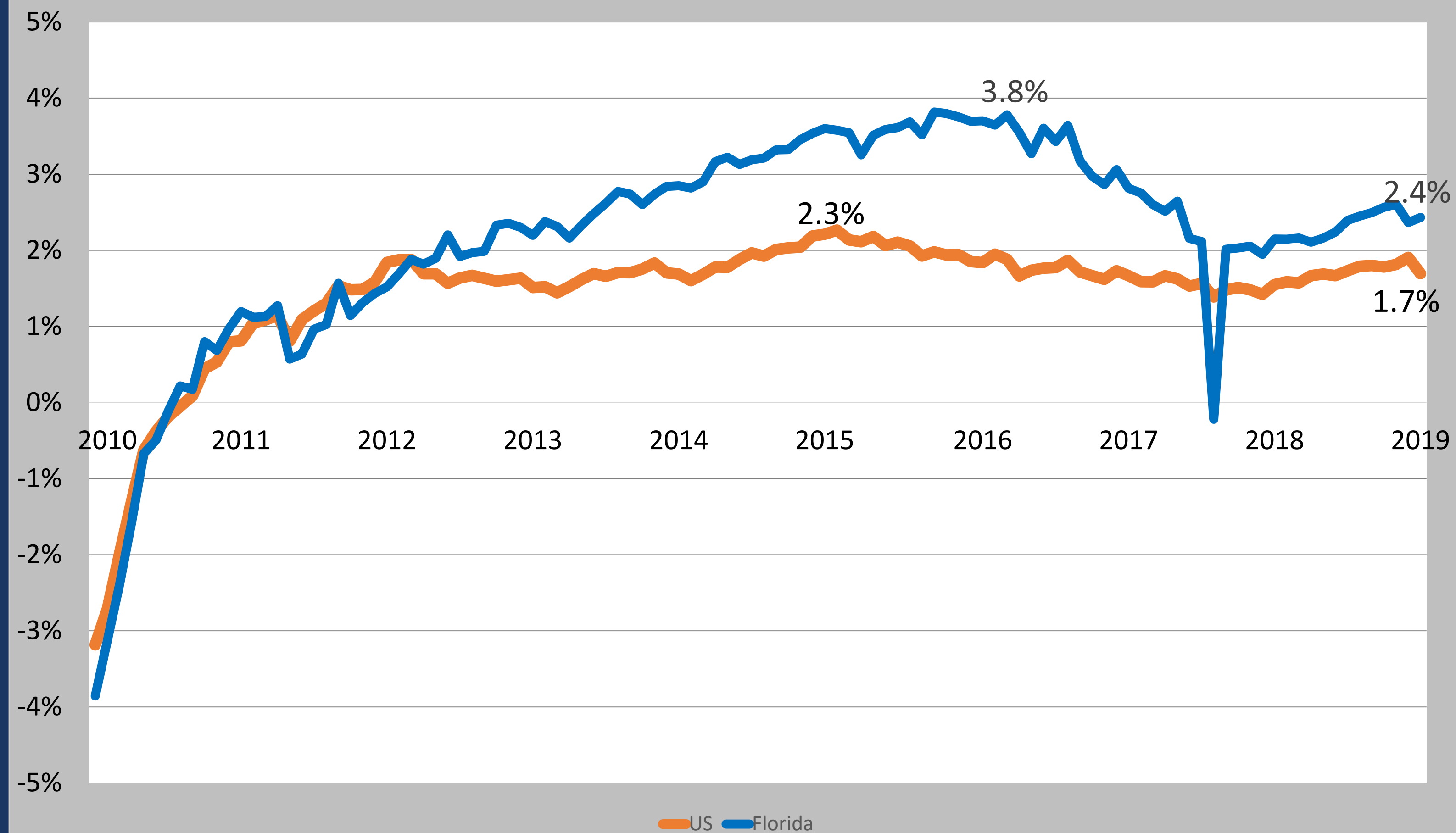
Florida At A Glance

- Florida's Economy \$1 Trillion GDP
 - 17th Largest In The World
- 21.5 Million Residents
 - 3rd / 26M By 2030 / More Than 900/Day
- 126.1 Million Visitors In 2018
- Florida Creates 1 Out Of Every 13 Jobs In The Nation
- 286,300 Jobs Looking for People. 360,000 People Looking for Jobs.

www.TheFloridaScorecard.org



Job Growth Rates - Florida versus U.S.



Job Creation

March 2018 – March 2019

U.S. Growth Rate 1.7%

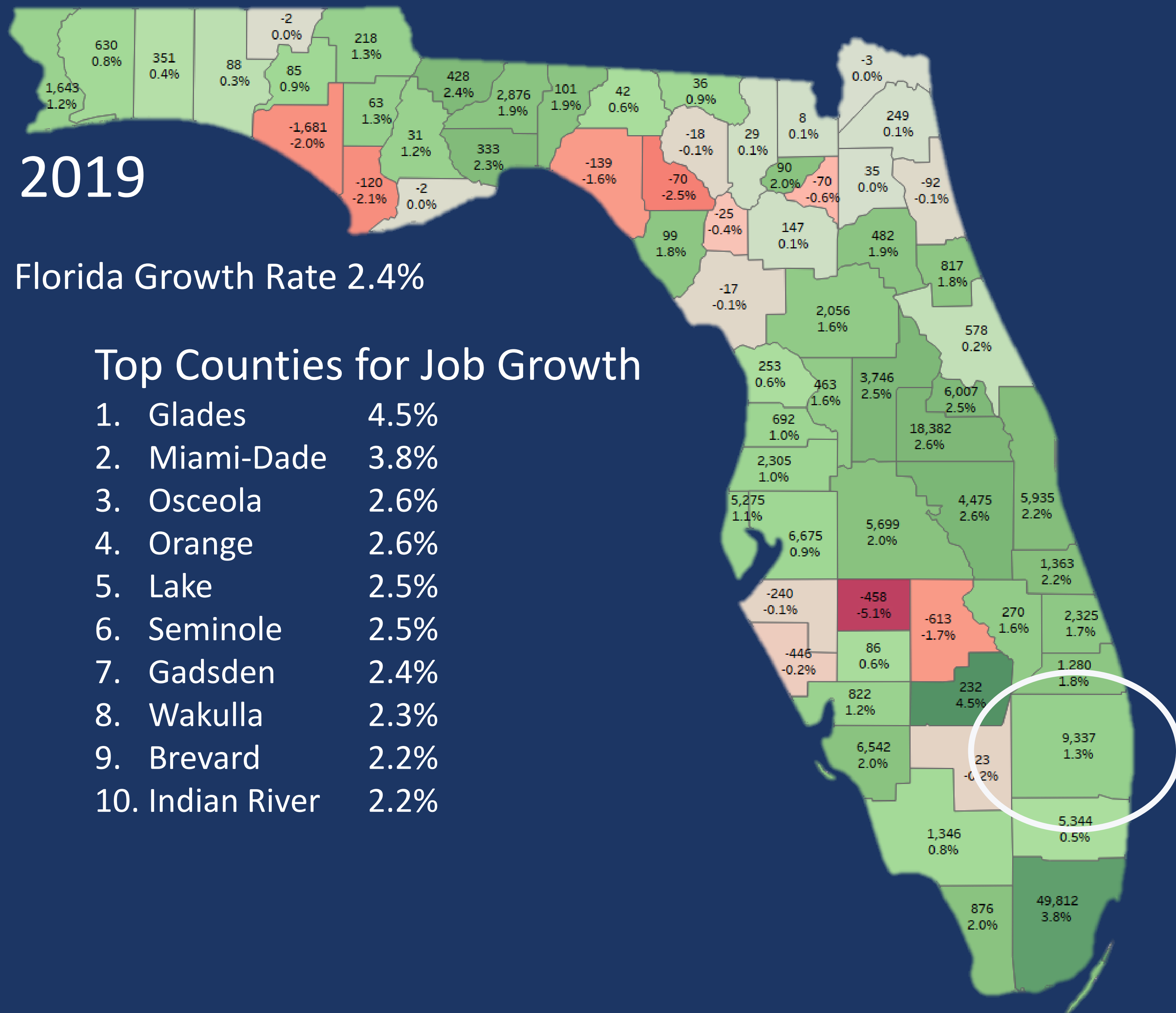
Florida Growth Rate 2.4%

Top Counties for Jobs

1. Miami-Dade	49,812
2. Orange	18,382
3. Palm Beach	9,337
4. Hillsborough	6,675
5. Lee	6,542
6. Seminole	6,007
7. Brevard	5,935
8. Polk	5,699
9. Broward	5,344
10. Pinellas	5,275

Top Counties for Job Growth

1. Glades	4.5%
2. Miami-Dade	3.8%
3. Osceola	2.6%
4. Orange	2.6%
5. Lake	2.5%
6. Seminole	2.5%
7. Gadsden	2.4%
8. Wakulla	2.3%
9. Brevard	2.2%
10. Indian River	2.2%

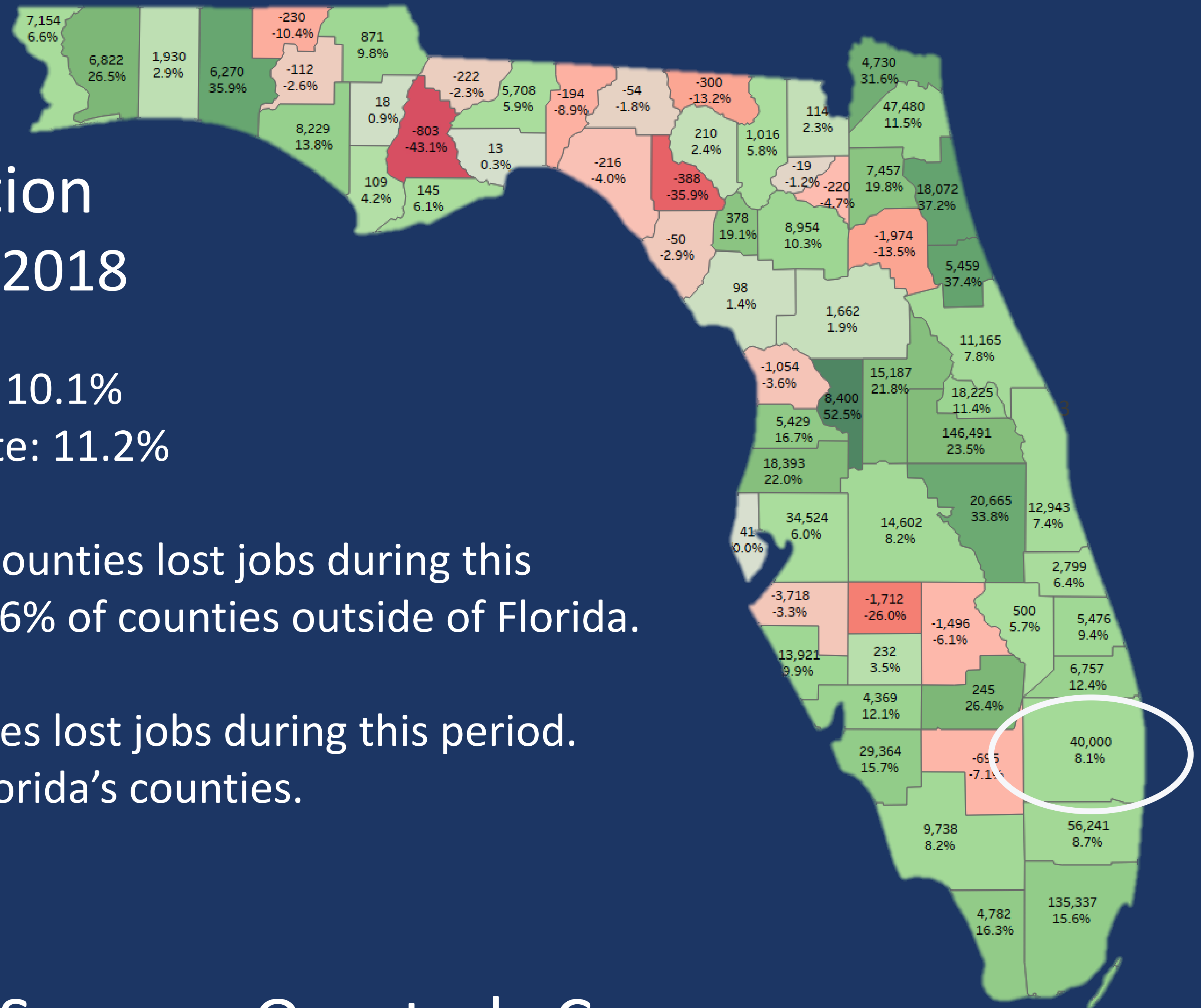


Job Creation 2007 to Q3 2018

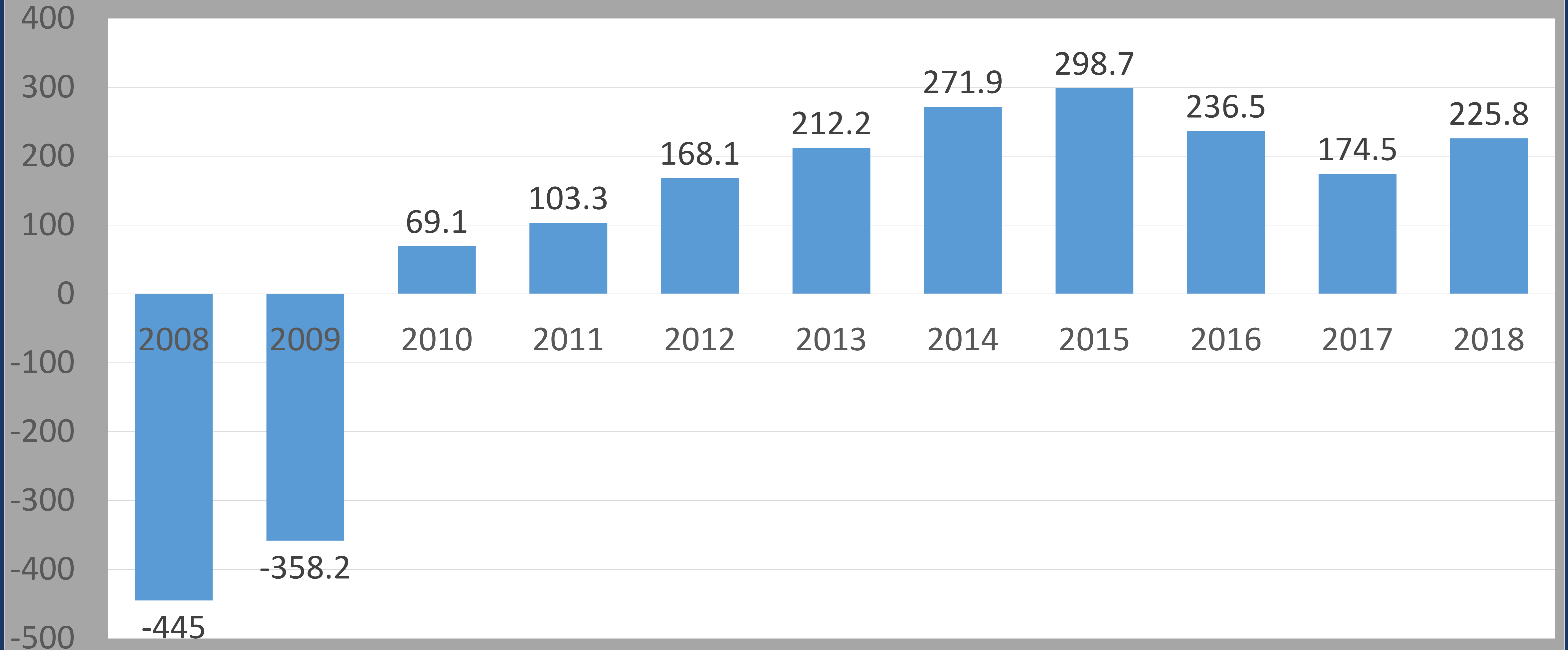
U.S. Growth Rate: 10.1%
Florida Growth Rate: 11.2%

49 States – 1,274 counties lost jobs during this period. That is 41.6% of counties outside of Florida.

Florida – 18 counties lost jobs during this period.
That is 26.8% of Florida's counties.



Yearly Florida Job Creation (thousands)



2019 Forecasts

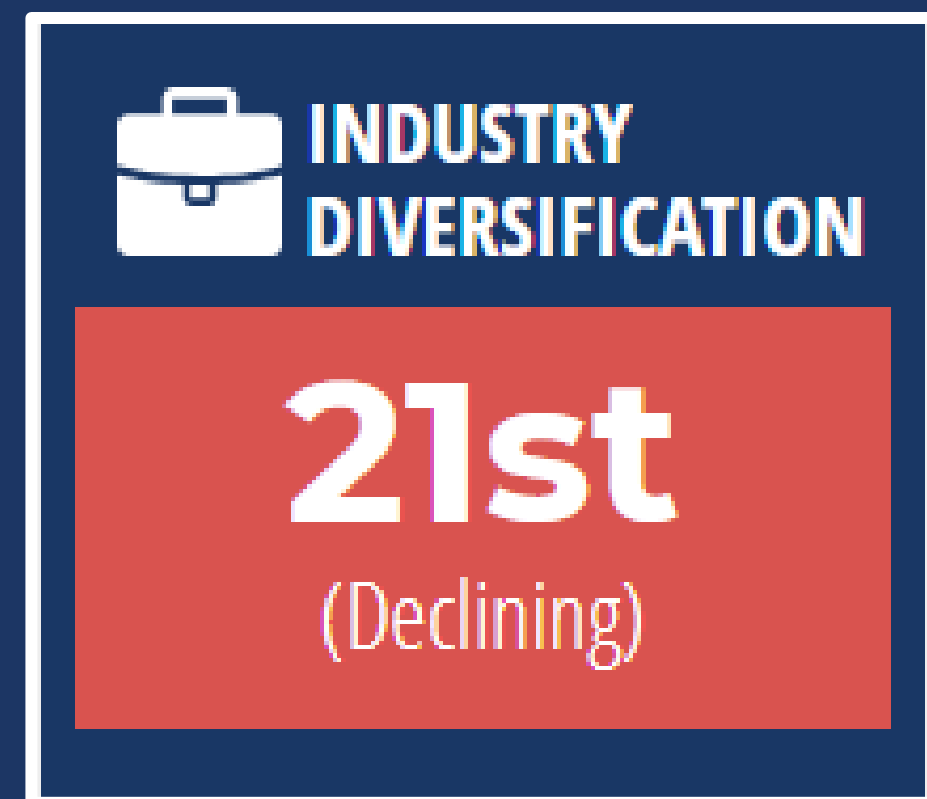
1. Jobs Created – 150,000
2. Population Increase – 330,000
3. Top Industry Growth Rates:
 1. Construction
 2. Professional & Business Services
 3. Health Services

Industry	Jobs – March 2018 thru March 2019	Percent Growth
Professional & Business Services	50,500	3.7%
Education & Health Services	40,000	3.1%
Leisure & Hospitality	28,900	2.4%
Trade, Transportation & Utilities	26,300	1.5%
Construction	24,100	4.5%
Financial Activities	18,300	3.2%
Manufacturing	11,800	3.2%

Innovation and Economic Development

Manufacturing: Florida 2.8 x U.S. Rate

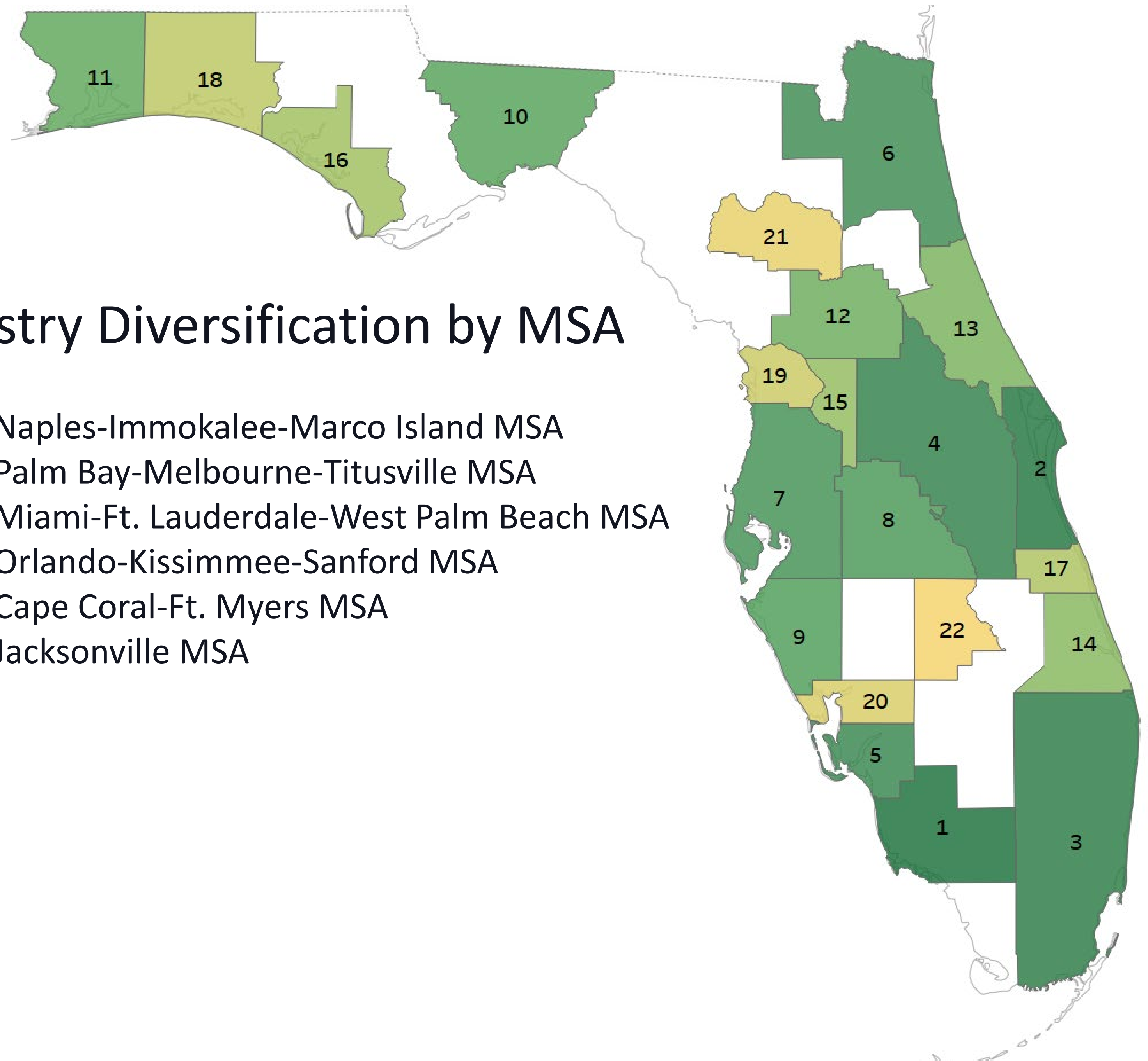
Florida-current



Florida-2017



Florida



Florida Industry Diversification by MSA

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

Q3 2018 data

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



Florida's Next 4.5 Million People

Top 10 Growth in People

1. Miami-Dade	639,060
2. Orange	451,990
3. Hillsborough	412,926
4. Broward	329,843
5. Palm Beach	279,976
6. Duval	225,250
7. Lee	212,763
8. Osceola	178,394
9. Polk	171,439
10. Pasco	129,769

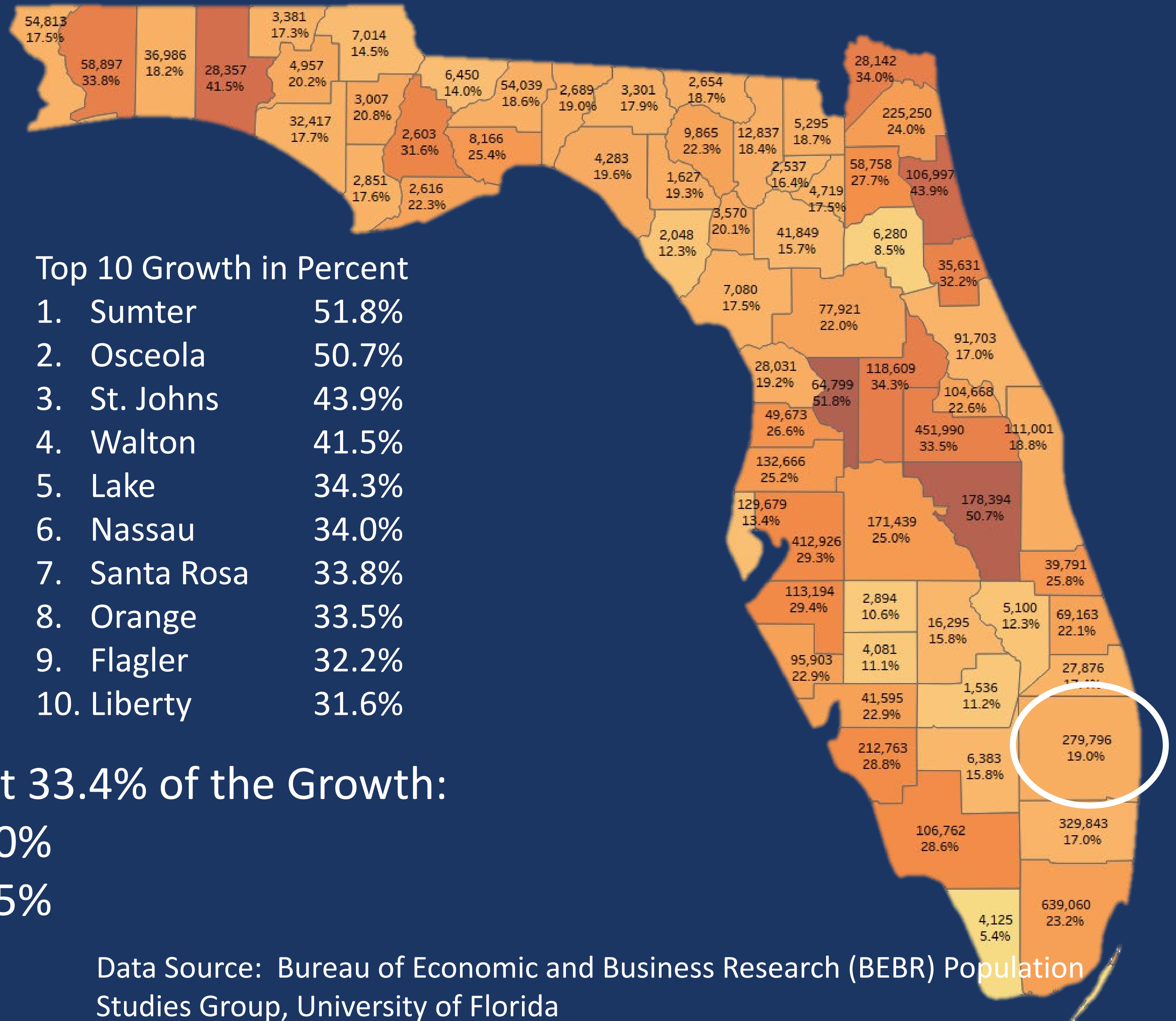
Top 10 Growth in Percent

1. Sumter	51.8%
2. Osceola	50.7%
3. St. Johns	43.9%
4. Walton	41.5%
5. Lake	34.3%
6. Nassau	34.0%
7. Santa Rosa	33.8%
8. Orange	33.5%
9. Flagler	32.2%
10. Liberty	31.6%

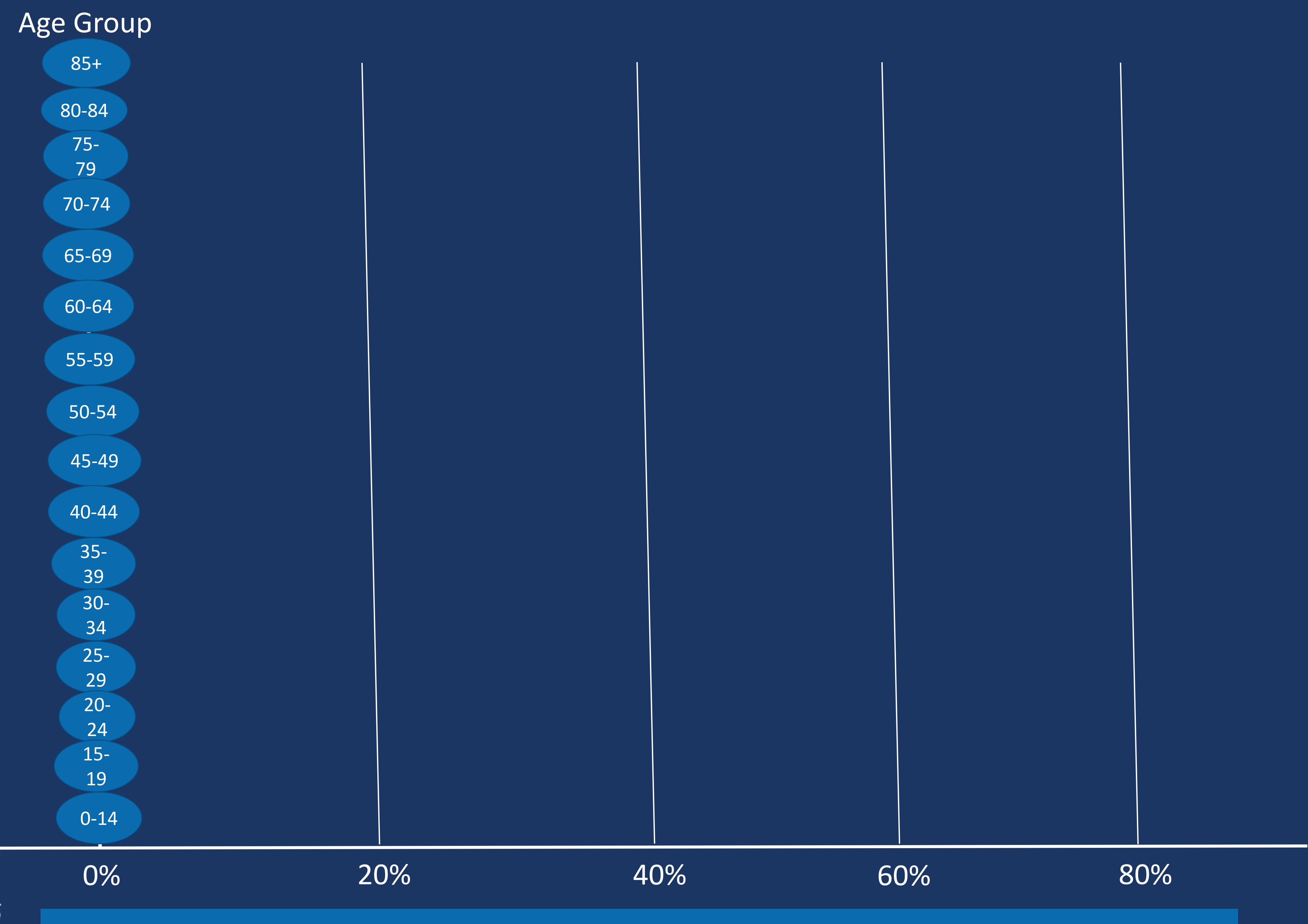
Top 3 Counties get 33.4% of the Growth:

Top 6: 52.0%

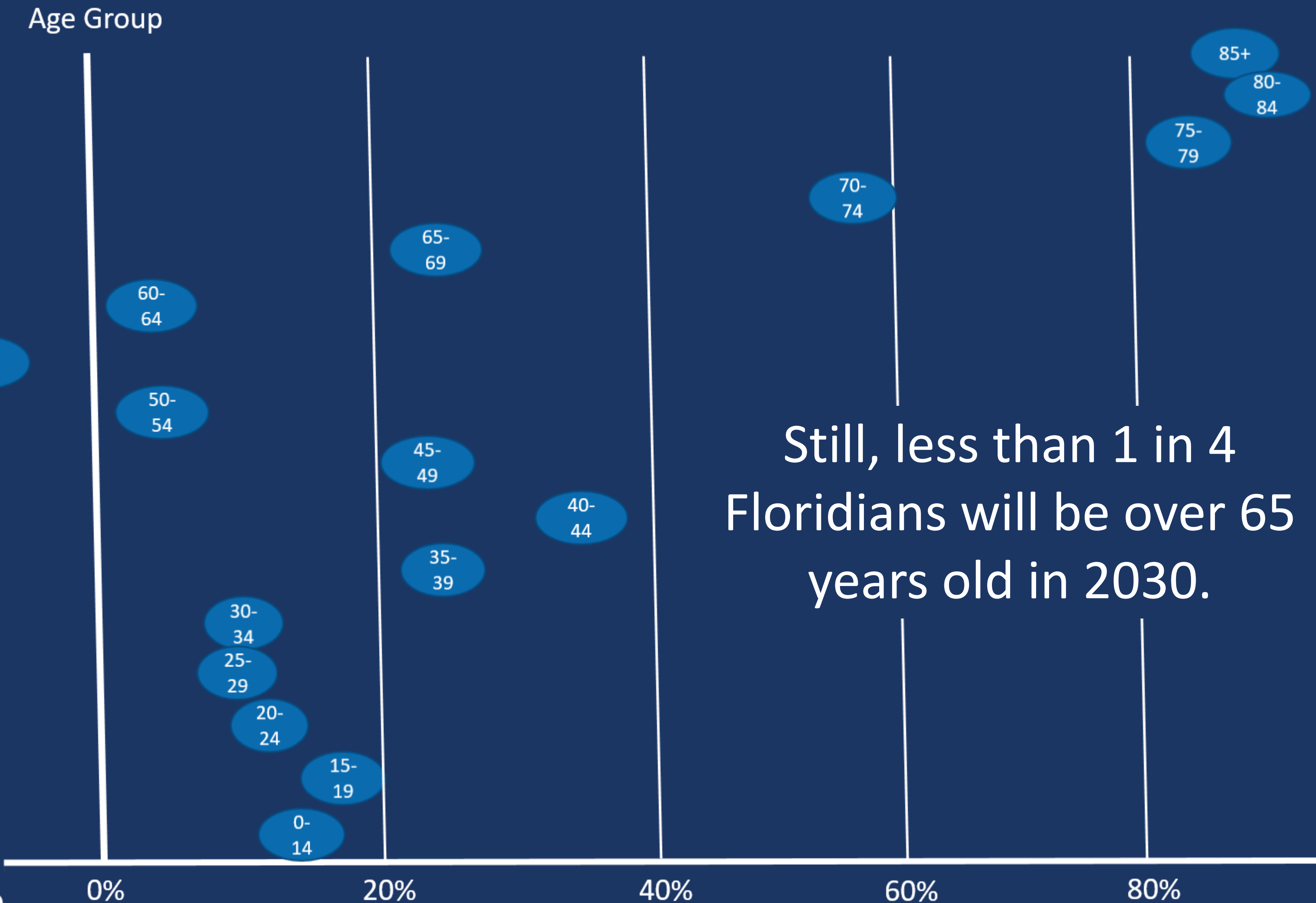
Top 13: 75.5%



Florida Growth to 2030 by Age Group

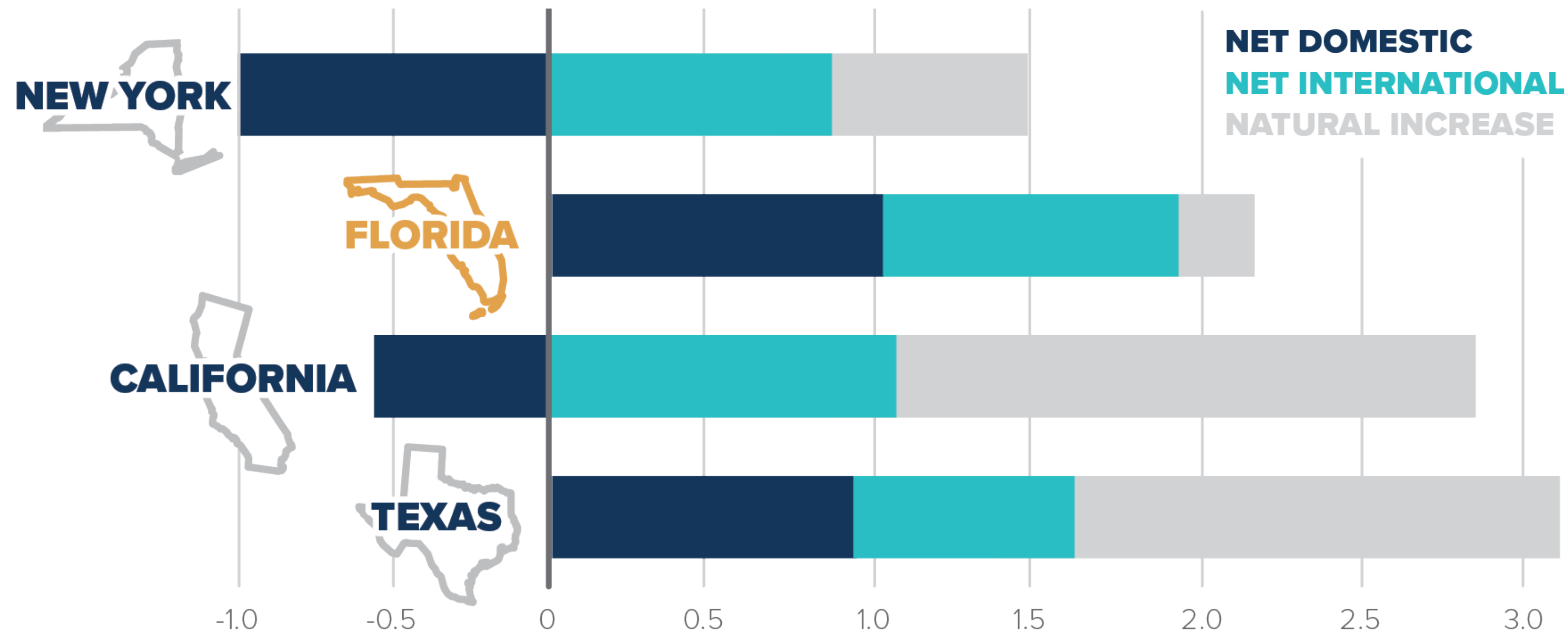


Florida Growth to 2030 by Age Group



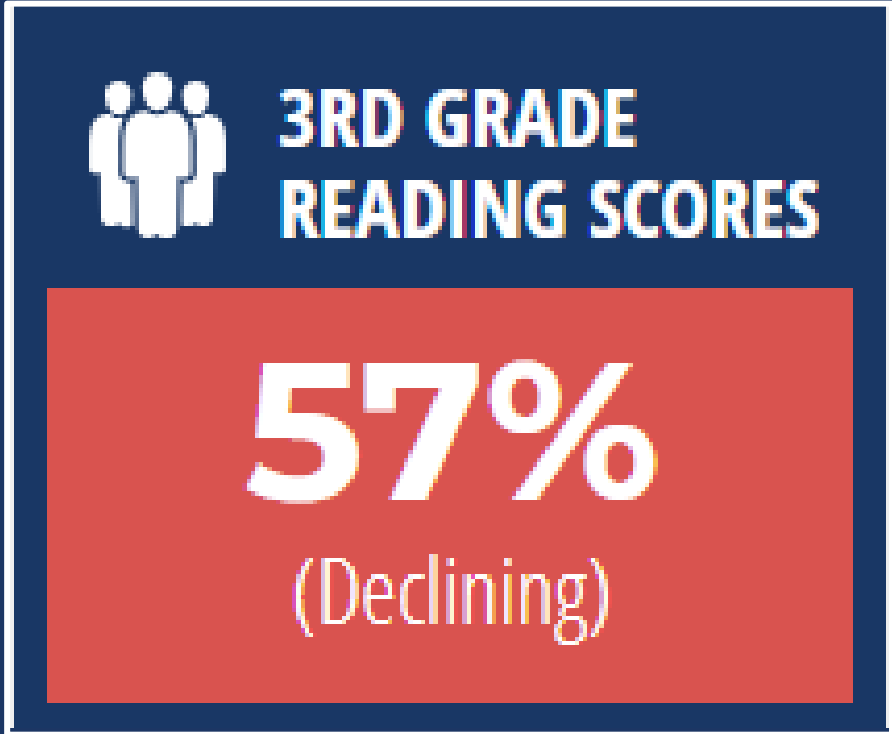
Still, less than 1 in 4
Floridians will be over 65
years old in 2030.

Where Does Florida's Growth Come From?

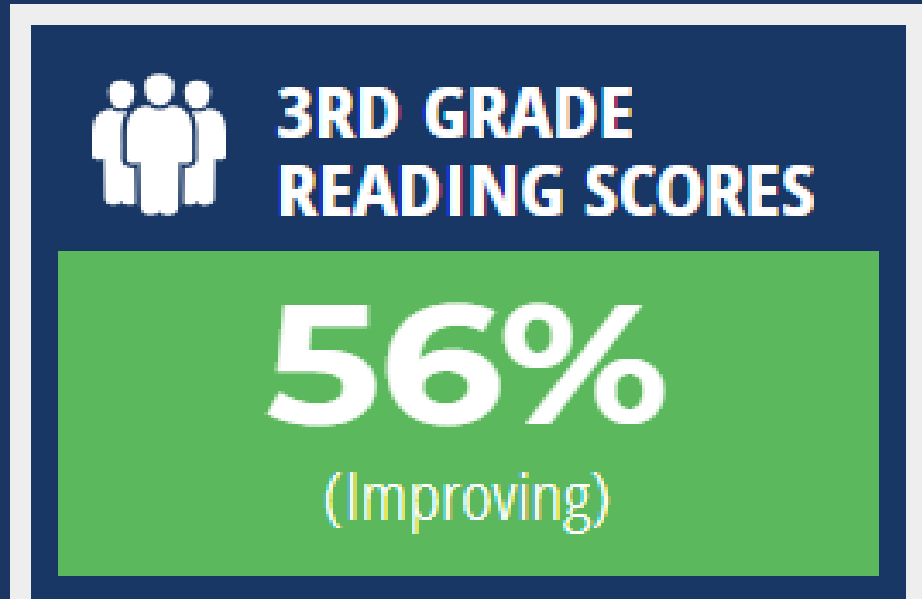


Florida's 3rd Grade Reading Scores

Florida

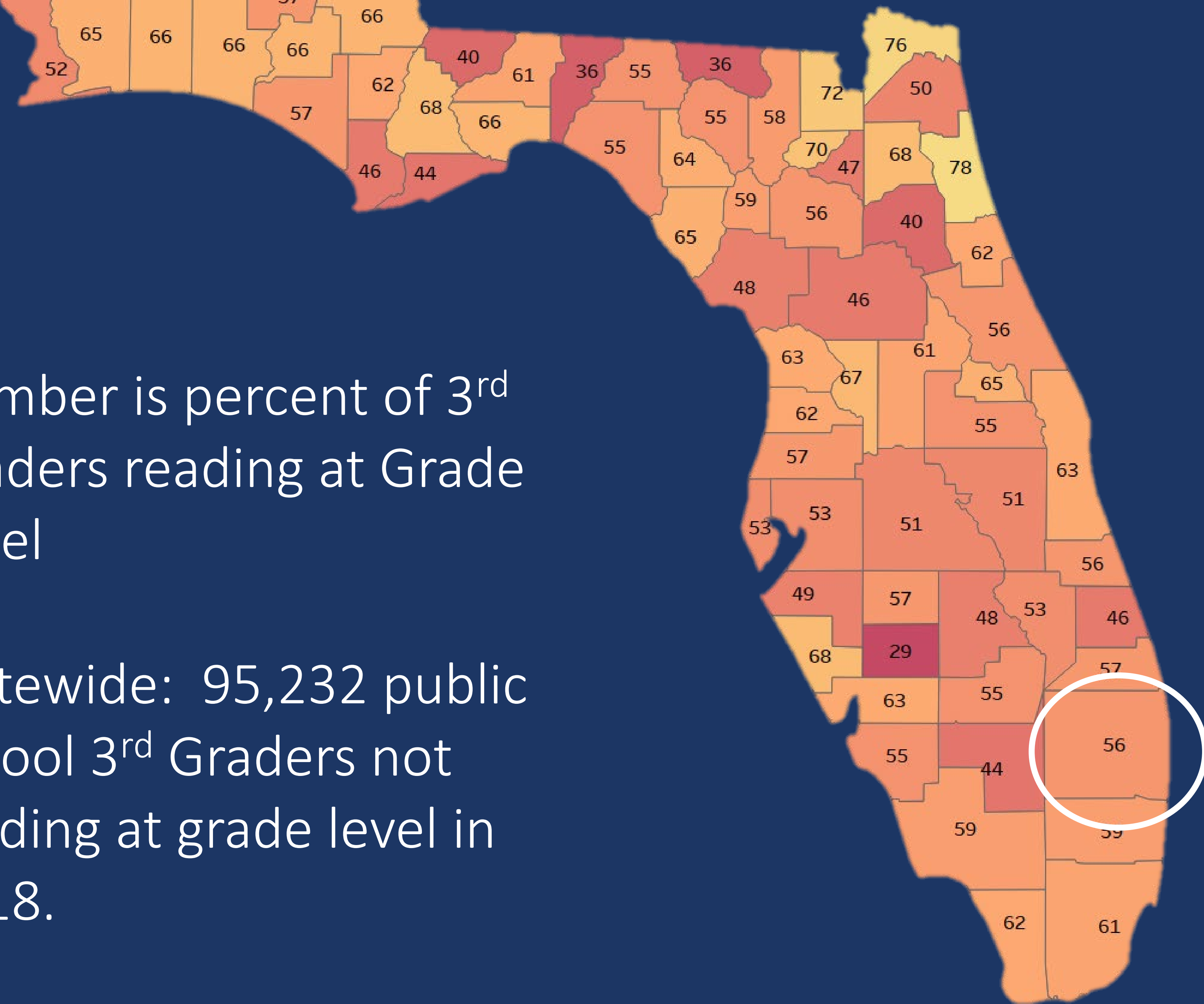


Palm Beach County



Number is percent of 3rd Graders reading at Grade Level

Statewide: 95,232 public school 3rd Graders not reading at grade level in 2018.



Under-18 Poverty in Florida

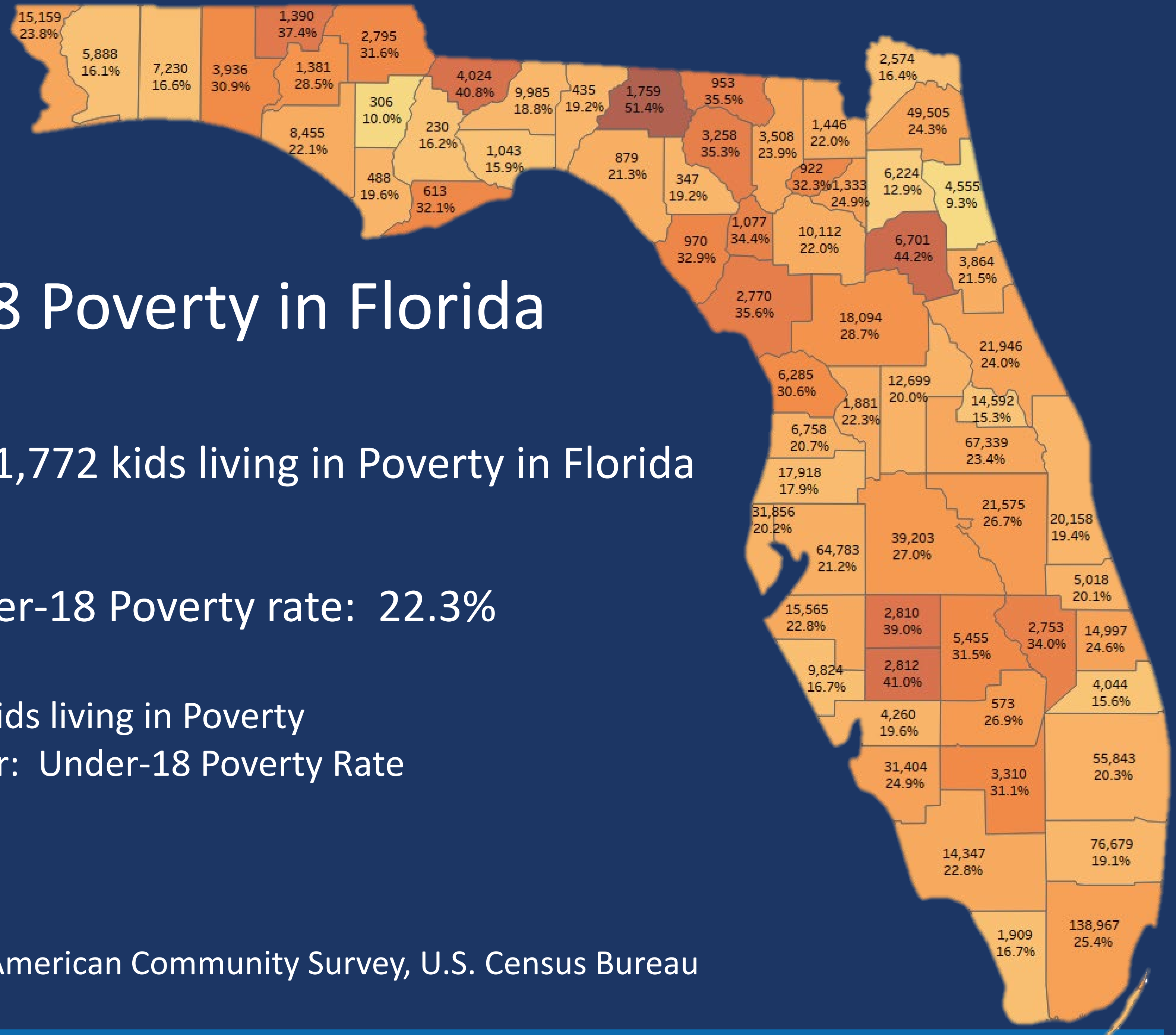
There are 901,772 kids living in Poverty in Florida

Florida's under-18 Poverty rate: 22.3%

Top Number: Kids living in Poverty

Bottom Number: Under-18 Poverty Rate

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

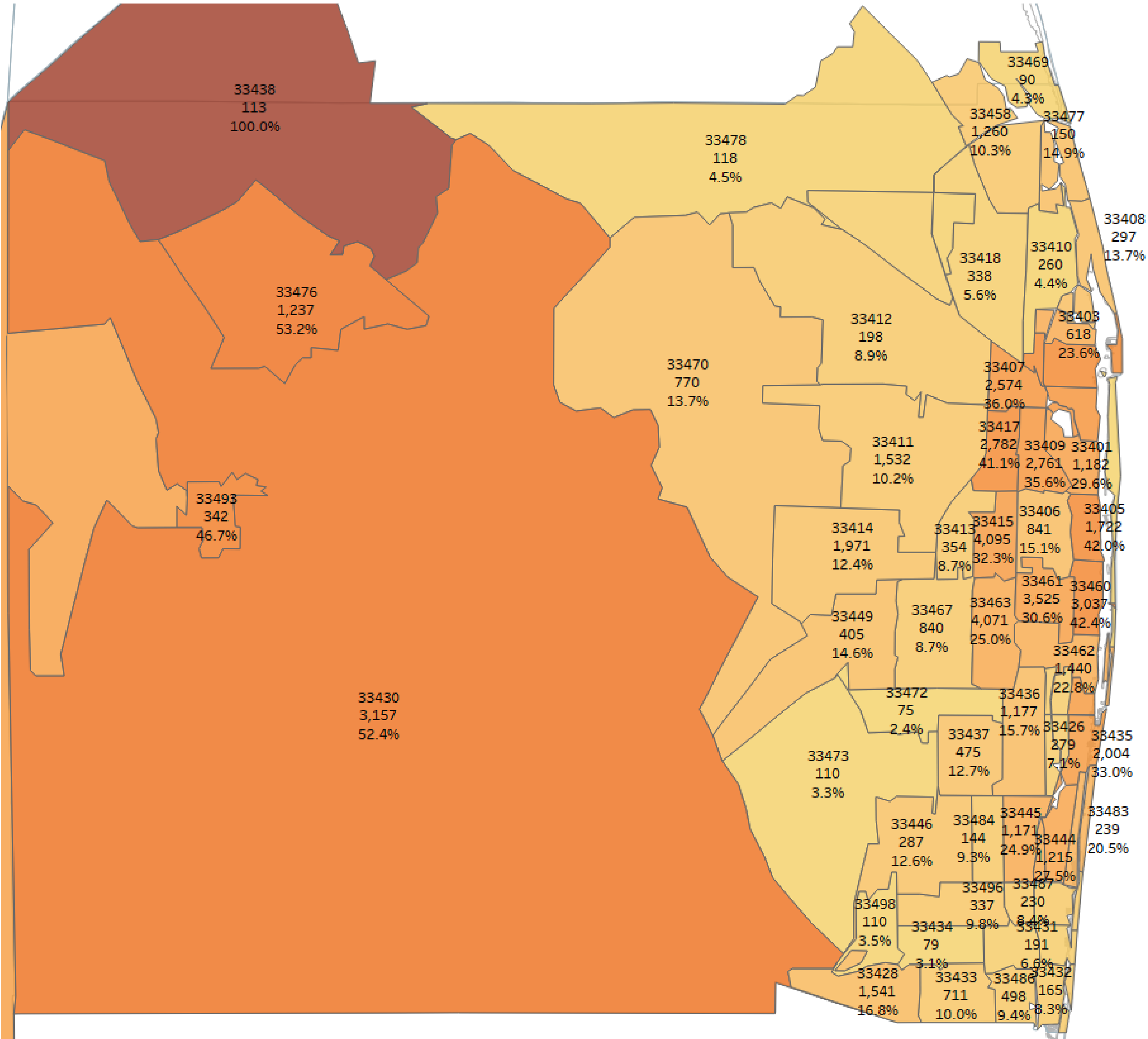


Palm Beach County Under-18 Poverty

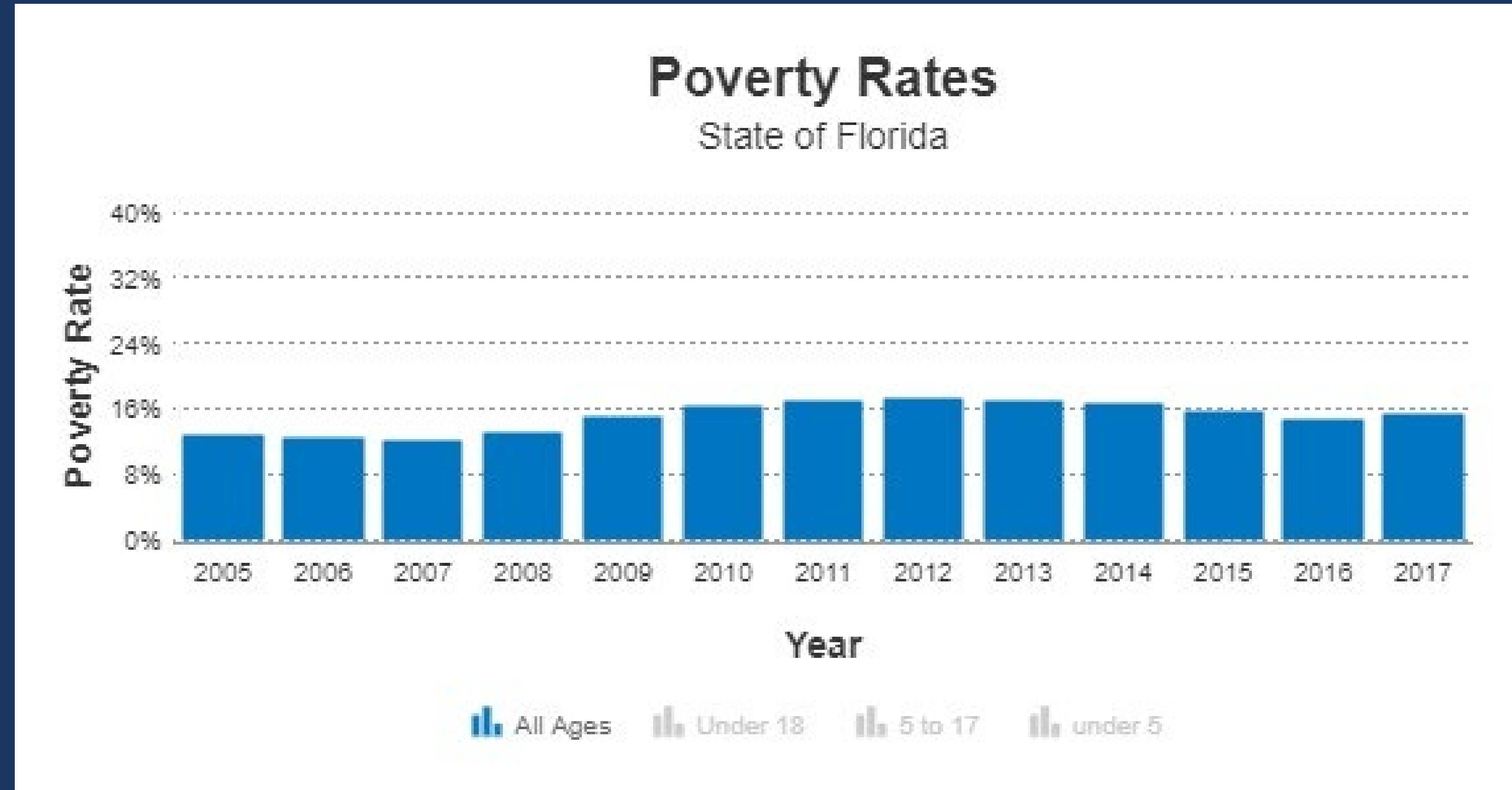
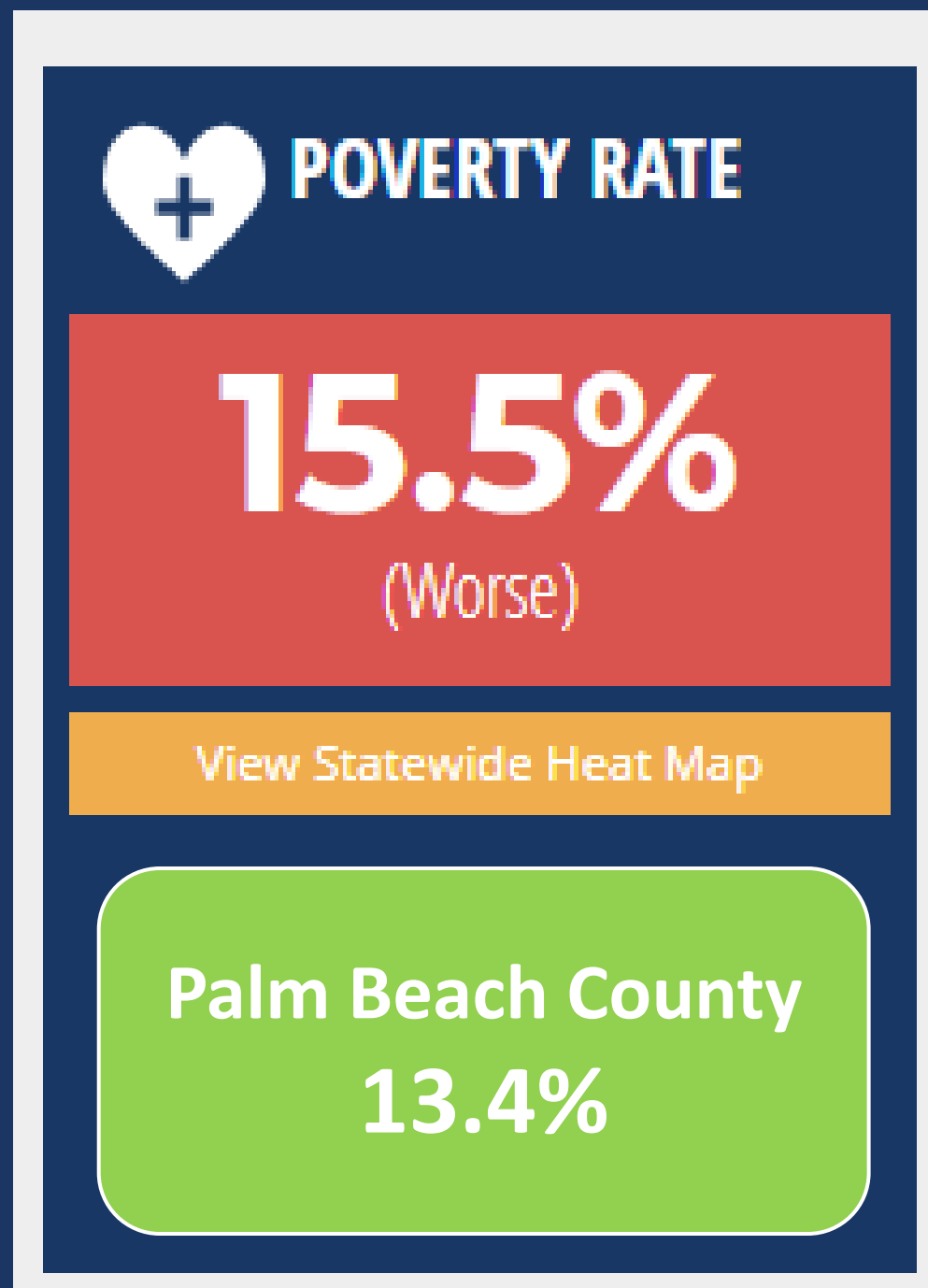
55,843 kids in Poverty

20.3% of kids in Palm
Beach County

Top Number: Zip Code
Middle Number: Number of kids in
Poverty
Bottom Number: Under-18 Poverty Rate



Ending Poverty Through Prosperity



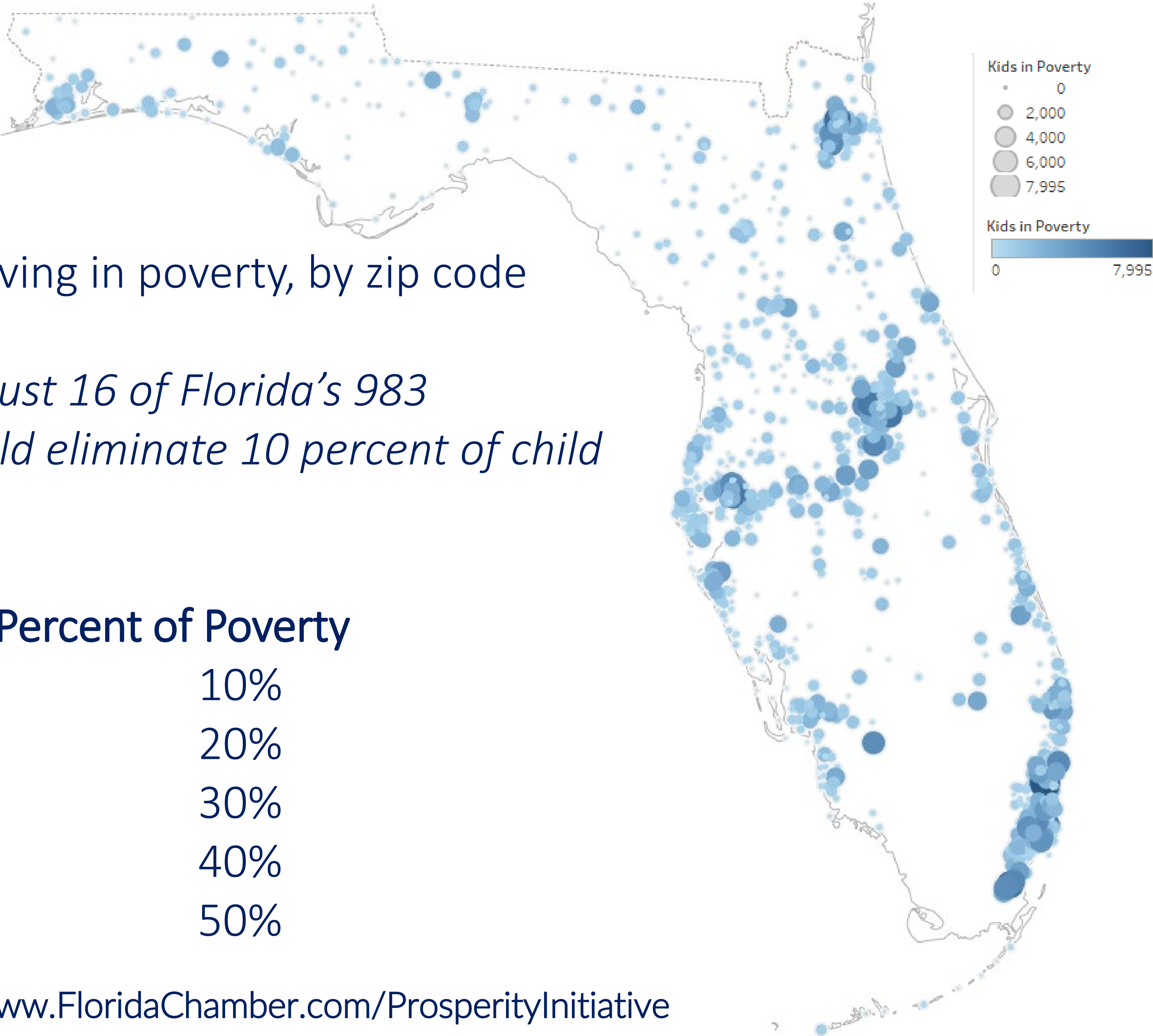
Kids in Poverty in Florida

901,772 under-18 year olds living in poverty, by zip code

“If you eliminated poverty in just 16 of Florida’s 983 populated zip codes, you would eliminate 10 percent of child poverty in Florida”

Top Zip Codes	Percent of Poverty
16	10%
39	20%
69	30%
105	40%
148	50%

www.FloridaChamber.com/ProsperityInitiative



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



“We won’t get the policies right until we get the politics right.” – Will Weatherford



2018 Election Results and Analysis

Florida's Governor & Cabinet



Governor
Ron DeSantis (R)

- ✓ DeSantis won by 32,463 votes
- ✓ DeSantis won 54 Counties
- ✓ Gillum won 13 Counties



Commissioner of Agriculture
Nikki Fried (D)

- ✓ Fried won by 6,753 votes
- ✓ Caldwell won 54 Counties
- ✓ Fried won 13 Counties



Attorney General
Ashley Moody (R)

- ✓ Moody won by 487,620 votes
- ✓ Moody won 59 Counties
- ✓ Shaw won 9 Counties



Chief Financial Officer
Jimmy Patronis (R)

- ✓ Patronis won by 279,681 votes
- ✓ Patronis won 57 Counties
- ✓ Ring won 10 Counties

Florida Legislature



Senate President Bill Galvano

Balance of Power

Senate – 23 R, 17 D

- 65% new since 2016

House – 73 R, 47 D

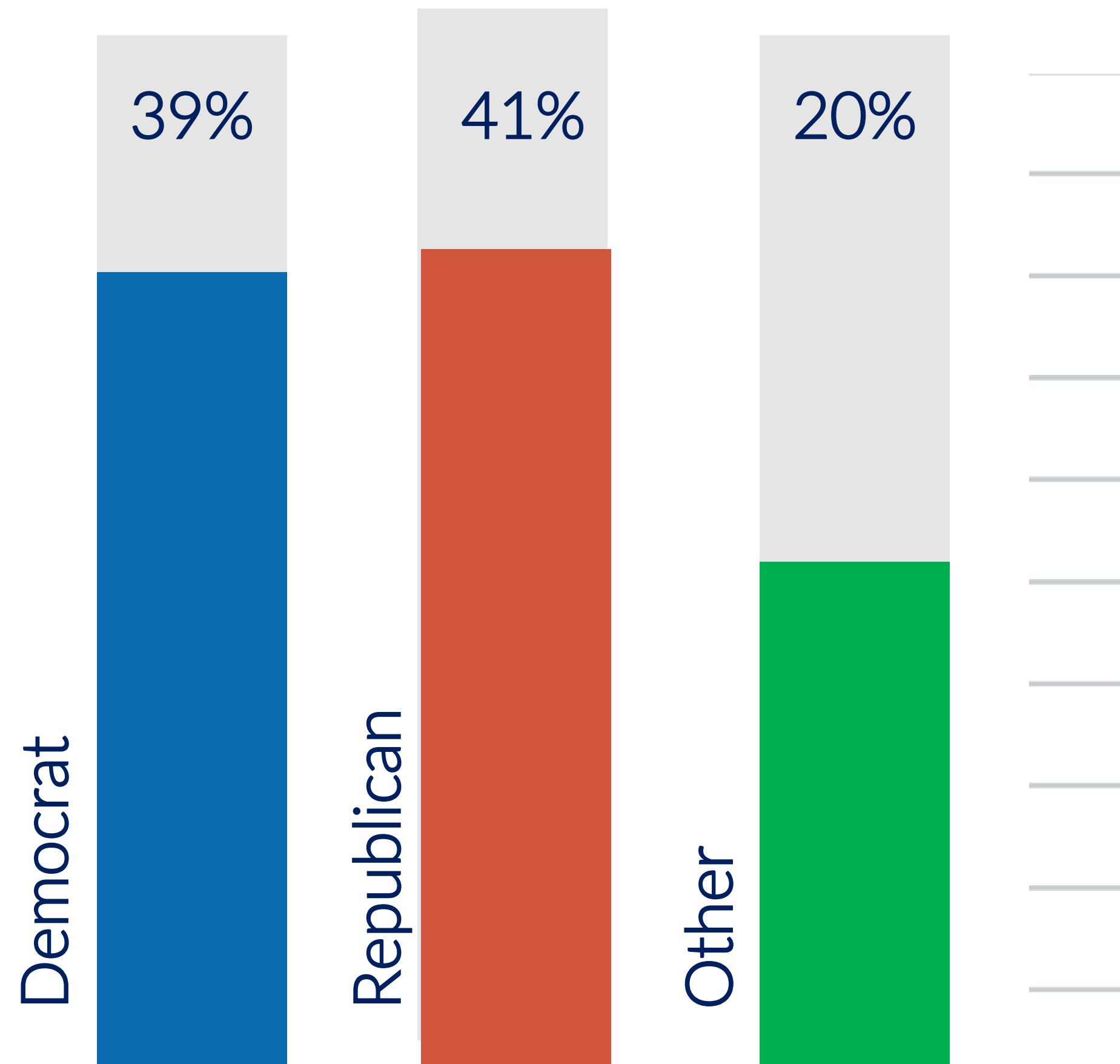
- 70% new since 2016

110 of 160 of the Legislature
have less than 2 years
experience



House Speaker José Oliva

2018 Voter Turnout By Party

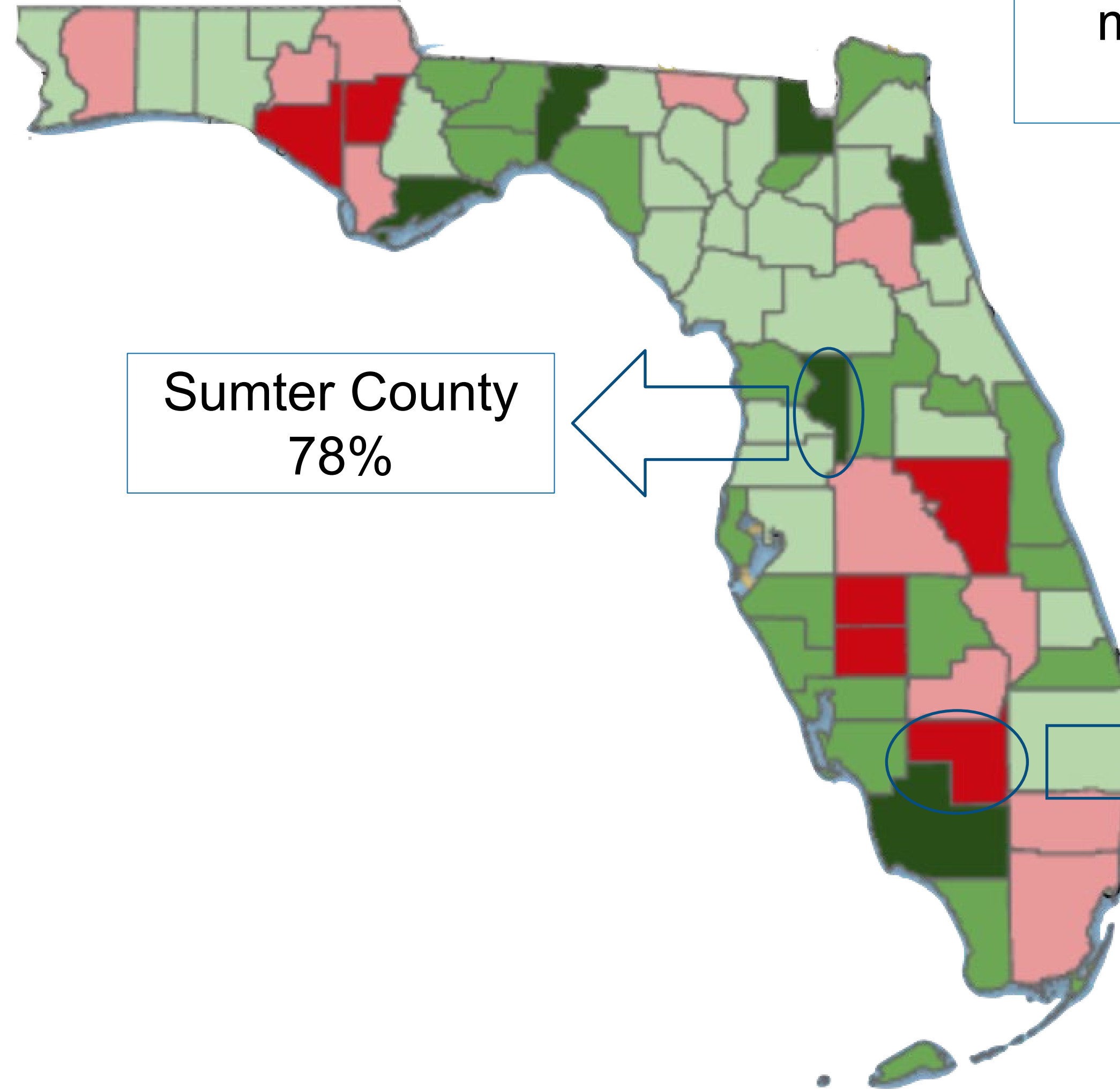
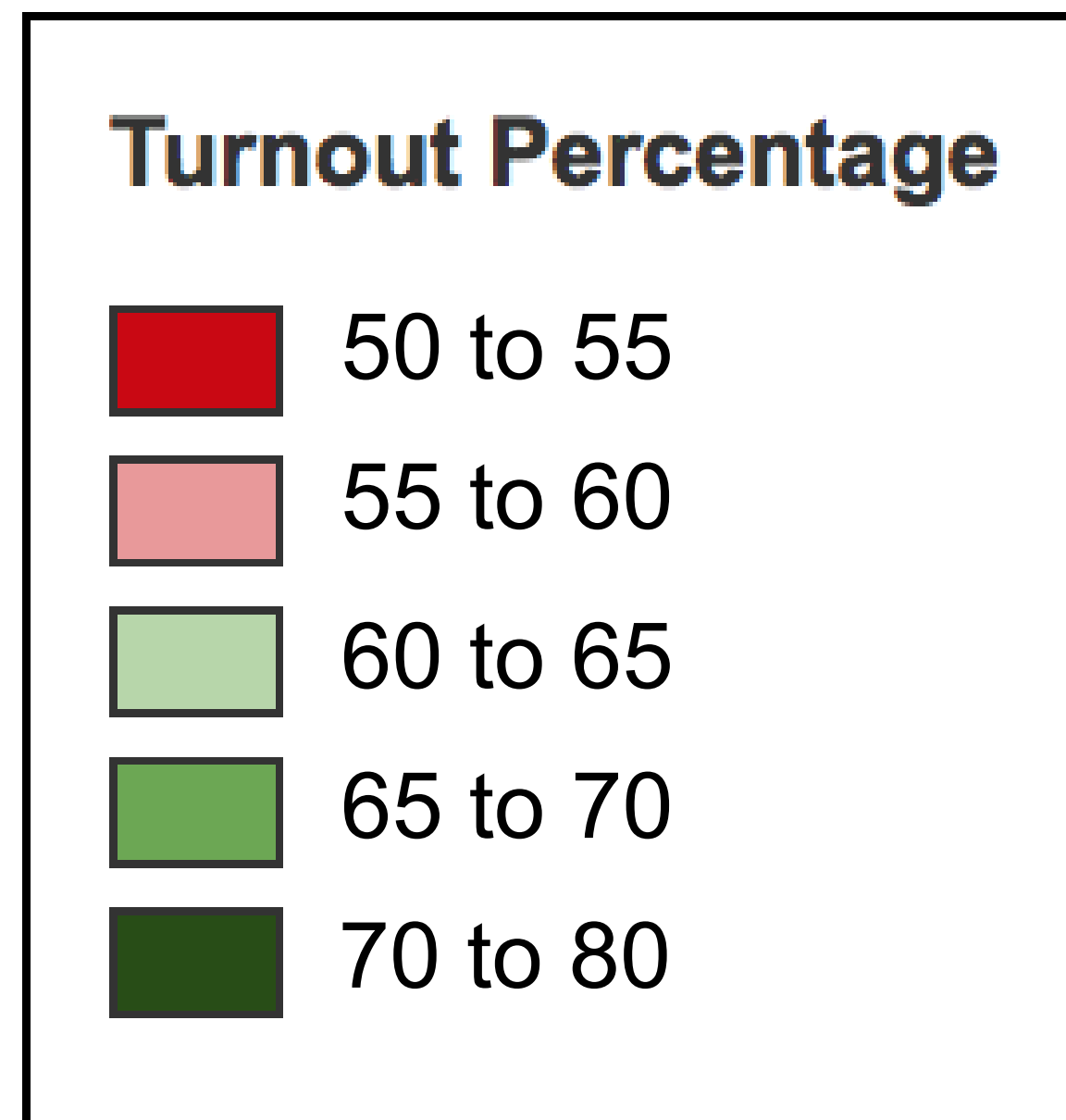


Why was Most Polling wrong in 2018?

- Most polling modeled NPA's higher than they have ever been in an election in Florida. One poll even had NPA above 30%
- Other polls modeled Democratic turnout closer to registration than how they usually perform in midterm elections (R+2 is the norm)

2018 Voter Turnout By County

8,318,824 out of 13,439,834
million Floridians voted
62%

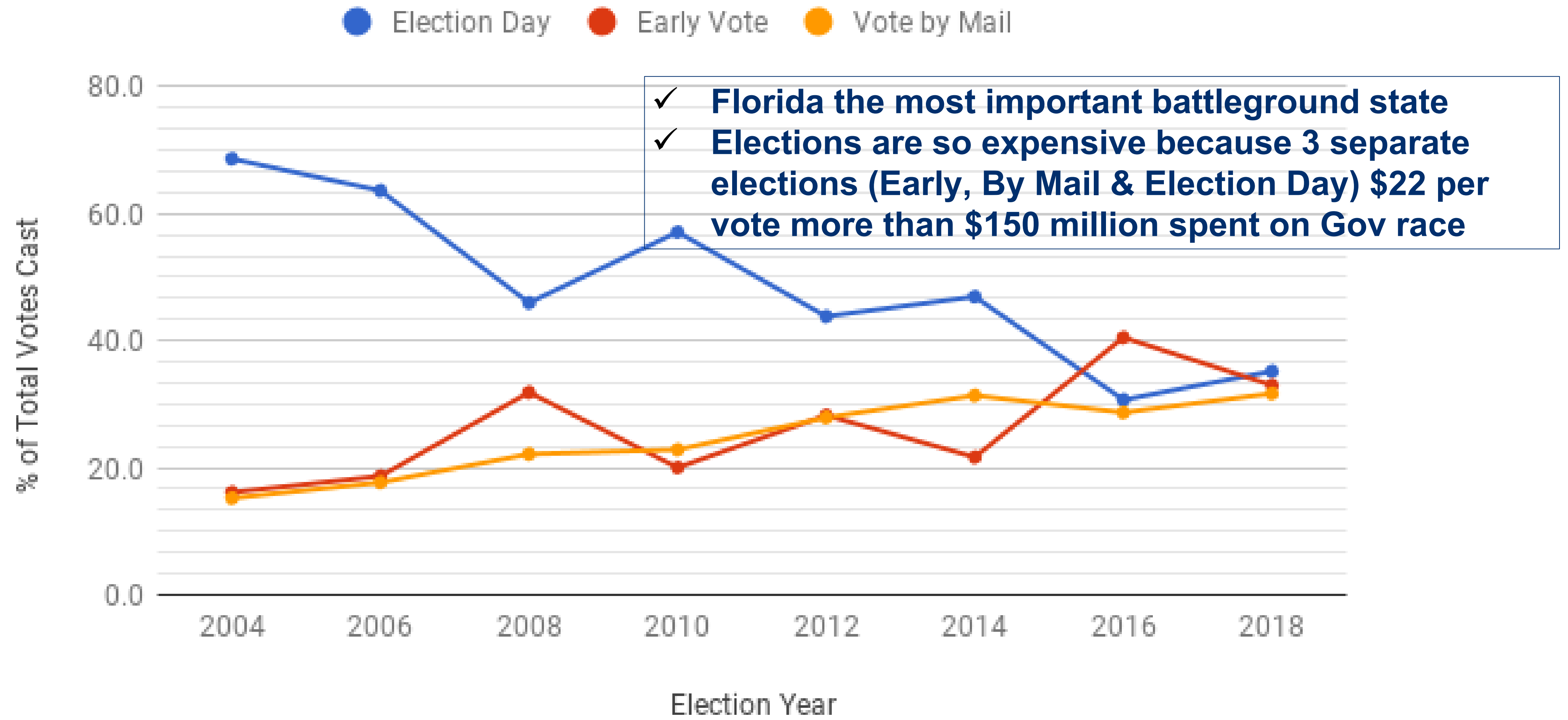


Sumter County
78%

Hendry County
50%

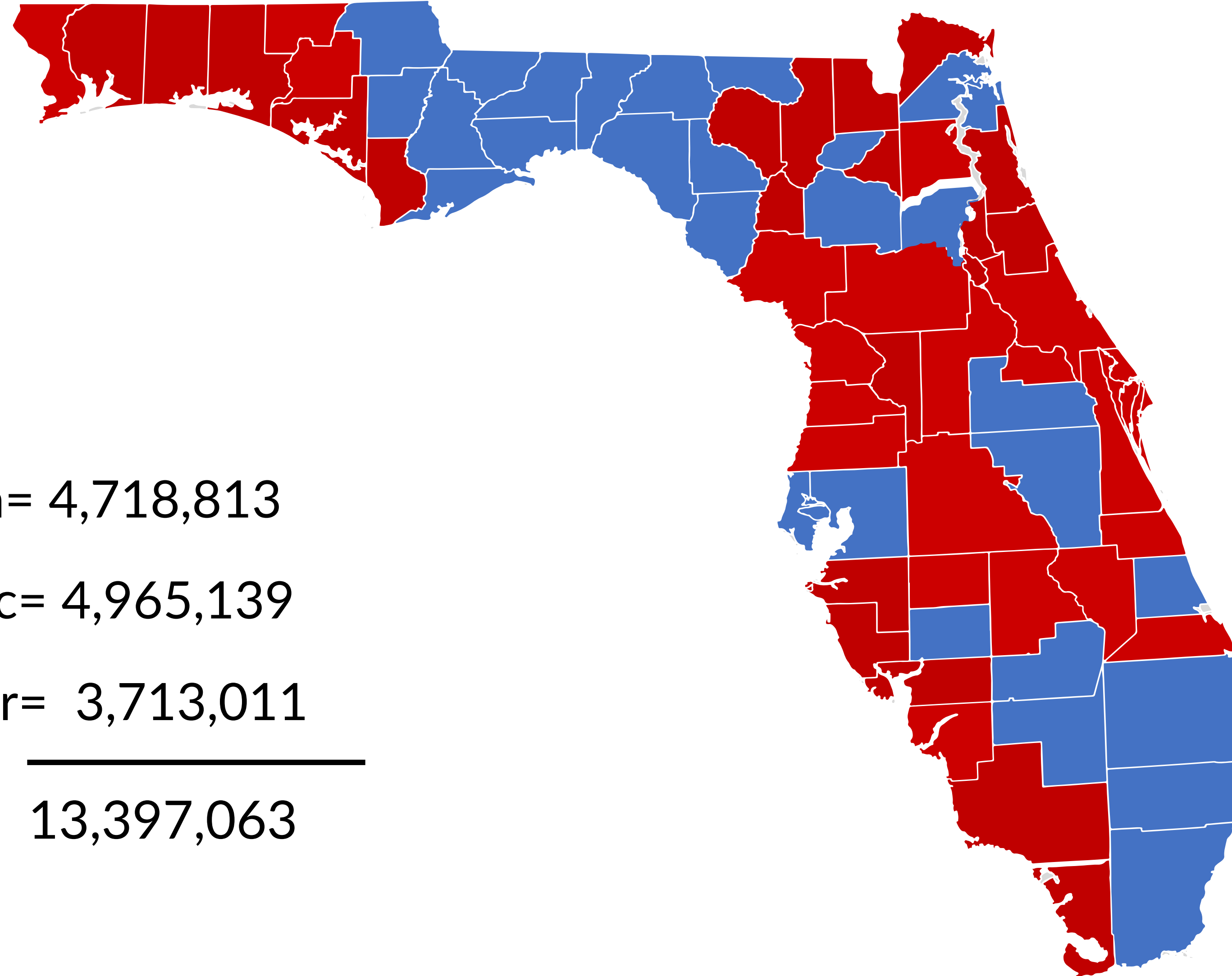
Florida's Electoral Changes and Forecast

Vote Share by Ballot Method



Total Voter Registration

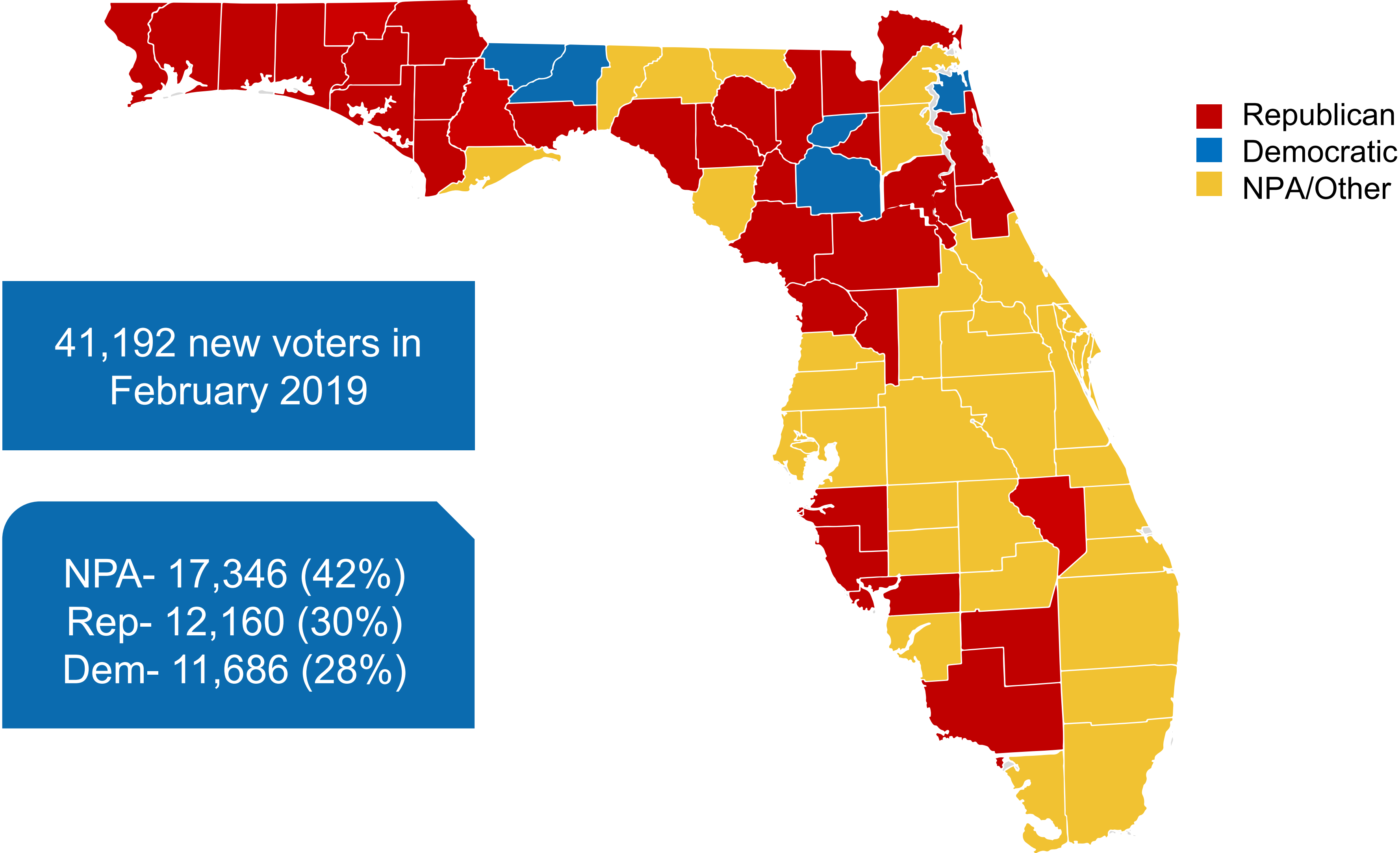
By County (41R, 26D)



■ Republican= 4,718,813
■ Democratic= 4,965,139
■ NPA/Other= 3,713,011

13,397,063

MARCH NEW VOTERS
By County

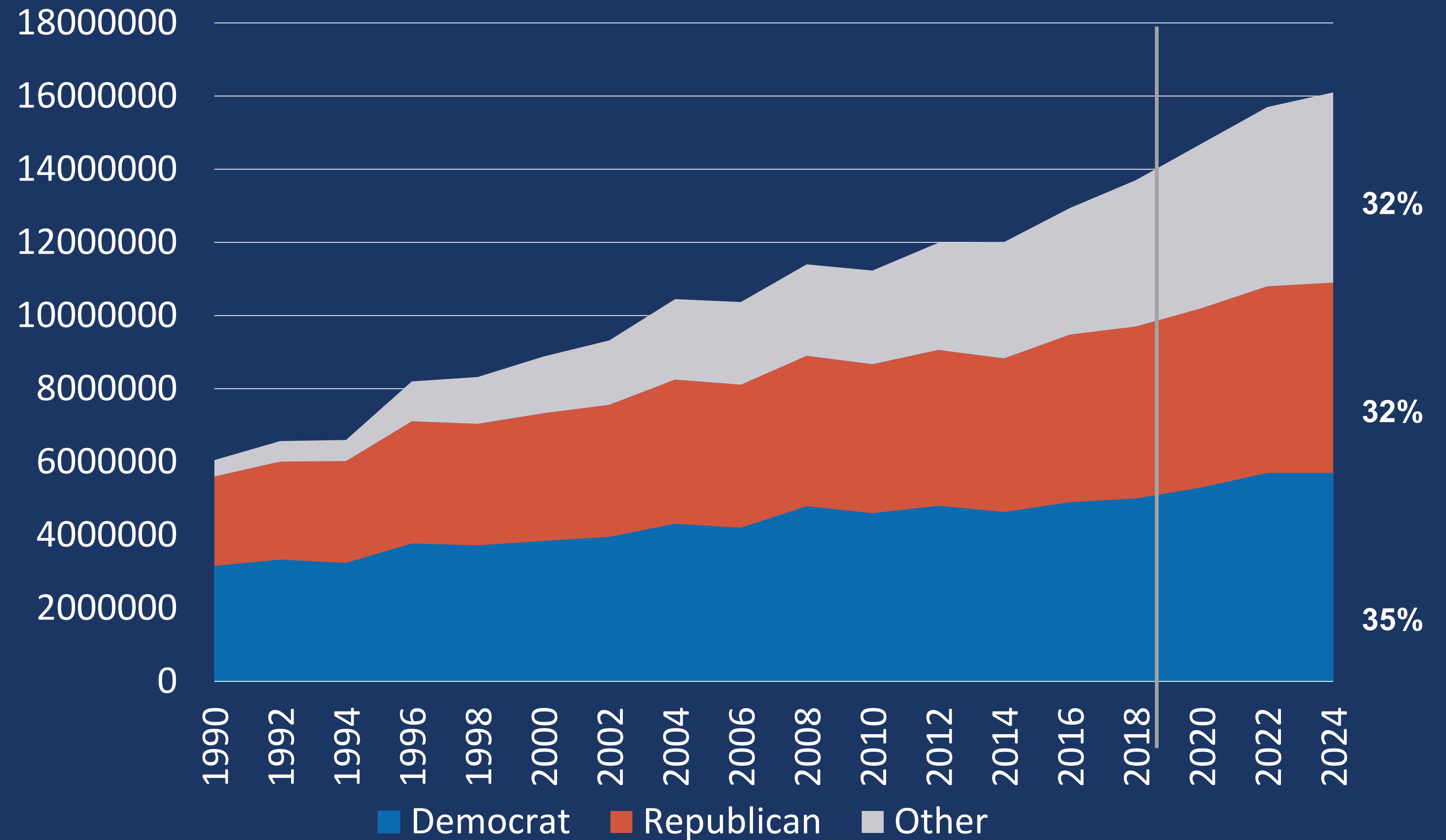


41,192 new voters in
February 2019

NPA- 17,346 (42%)
Rep- 12,160 (30%)
Dem- 11,686 (28%)

Voters Aren't Choosing Parties

Party
Registration
Projected
1990-2024





Florida Chamber's Latest Statewide Poll w/ Regional Insights

Changing Voter Attitudes

Statewide	54:25
Jacksonville	62:22
Gainesville	46:38
Tallahassee	50:31
Panama City/Pensacola	55:25
Orlando/Daytona	53:22
Tampa/St. Pete	56:24
Ft. Myers/Naples	61:25
Broward/Miami	52:27
Palm Beach	48:28

Statewide	54:25
Men	59:24
Women	50:26
Republicans	77:9
Democrats	34:43
Others	48:21
White	59:22
African- American	27:48
Hispanic	61:18

Top Voter Concerns by Media Market

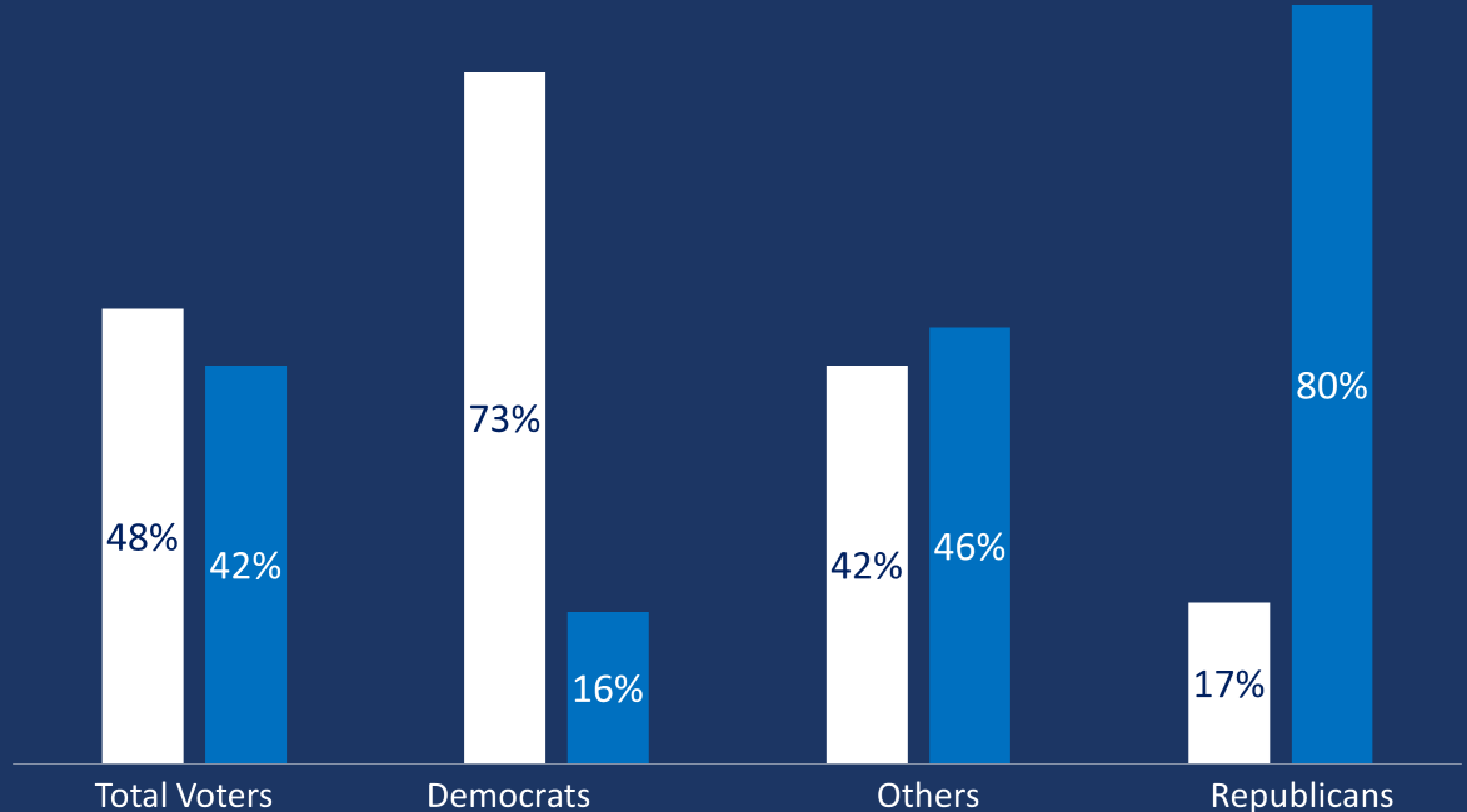
	EDUCATION	JOBS	ENVIRONMENT	OTHER
Statewide	13	11	11	Healthcare 10% Immigration 8% Gun Issues 5%
Jacksonville	22	9	9	Healthcare 11%
Gainesville	15	15	8	Healthcare 15%
Tallahassee	25	6	6	Crime/Drugs 13%
Panama City/Pensacola	16	18	5	Immigration 18%
Orlando/Daytona	15	11	13	Healthcare 11%
Tampa/St. Pete	8	10	12	Healthcare 12%
Ft. Myers/Naples	8	17	11	Immigration 8%
Broward/Miami	13	12	11	Healthcare 9%
Palm Beach	14	10	13	Healthcare 10%

Top Voter Concerns

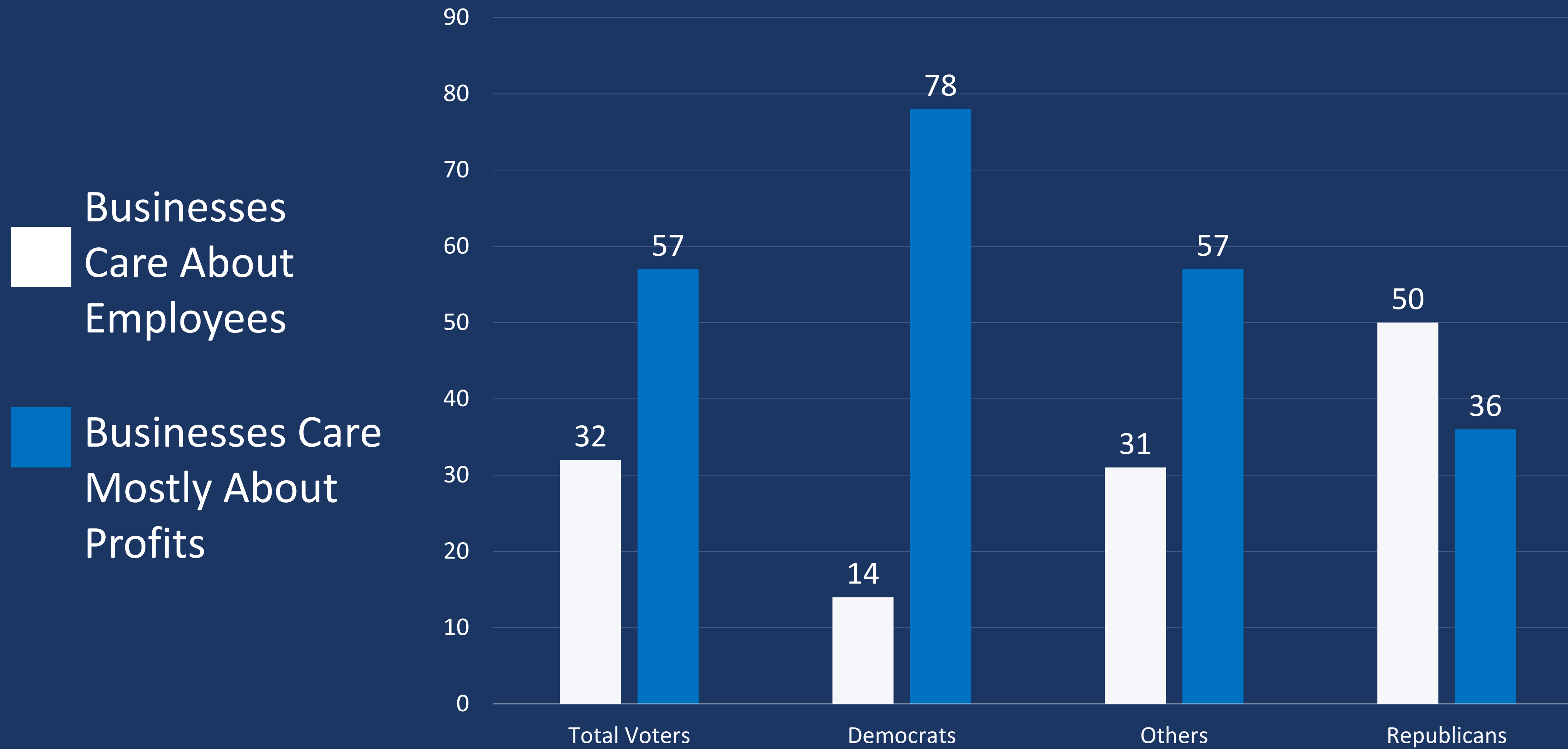
	EDUCATION	JOBS	ENVIRONMENT	OTHER
Statewide	13	11	11	Healthcare 10% Immigration 8% Gun Issues 5%
Men	9	12	13	Healthcare 8%
Women	17	11	9	Healthcare 11%
Rep	11	12	6	Immigration 13%
Dem	16	11	13	Healthcare 13%
Others	13	11	16	Healthcare 8%
White	12	10	15	Immigration 10%
Black	13	14	1	Healthcare 19%
Hispanic	19	17	6	Immigration 9%

What's Better? Socialism or Capitalism?

Voters Under 40



What Do You Think Motivates Business In Florida?



Getting Involved is Easy

#1

Join Us

- Florida Business Leader's Summit on Prosperity and Economic Opportunity – 5.22.2019
- Florida International Trade and Investment Conference – 5.30.2019
- Learners to Earners Workforce Summit – 6.18.2019

#2

Join a coalition/task force

- Autonomous Florida- www.Autonomous-Florida.com
- Business Alliance for Early Learning
- Infrastructure Coalition...and more

#3

Call Carolyn

- cgosselin@flchamber.com
- 850-521-1287

Download Today:

www.FloridaChamber.com/Delray



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