



Uniting Business for Good

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

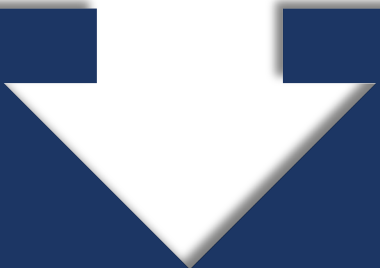
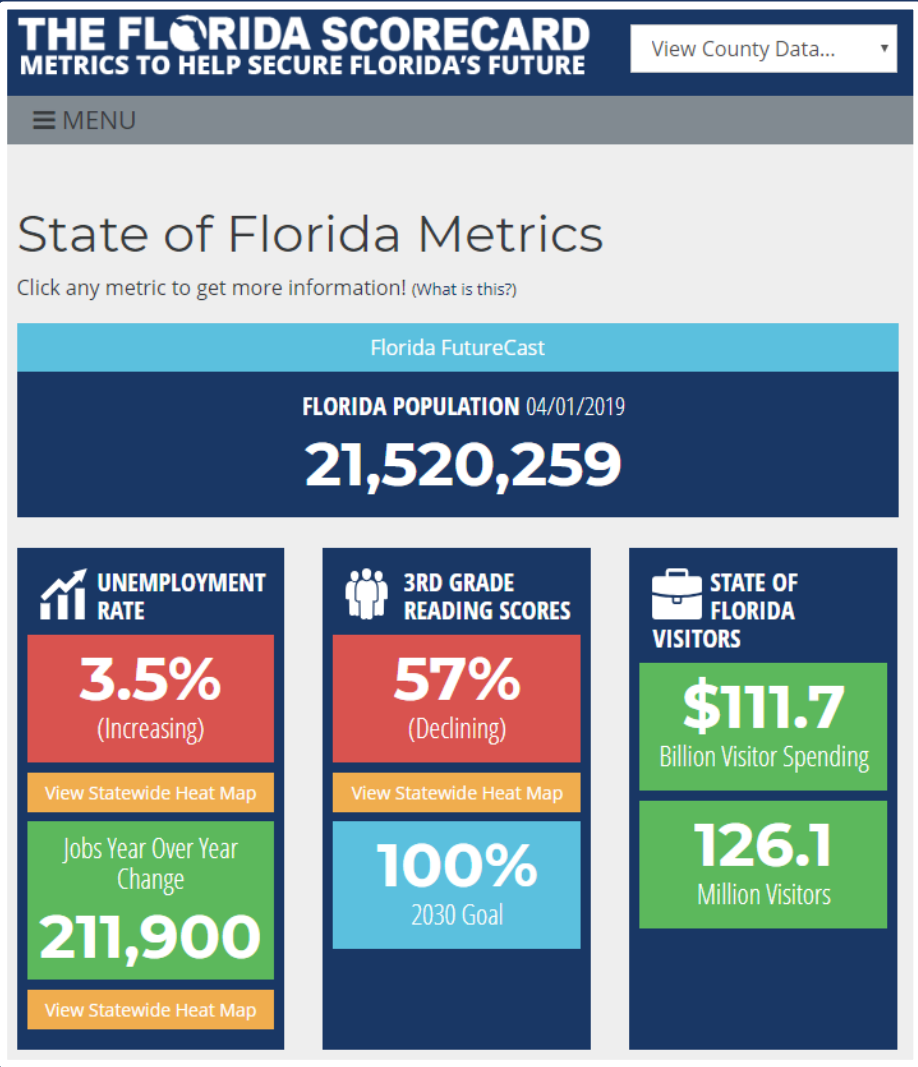
“Florida is changing. Our ECONOMICS, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson

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Uniting Business For Good



Solutions (Research)



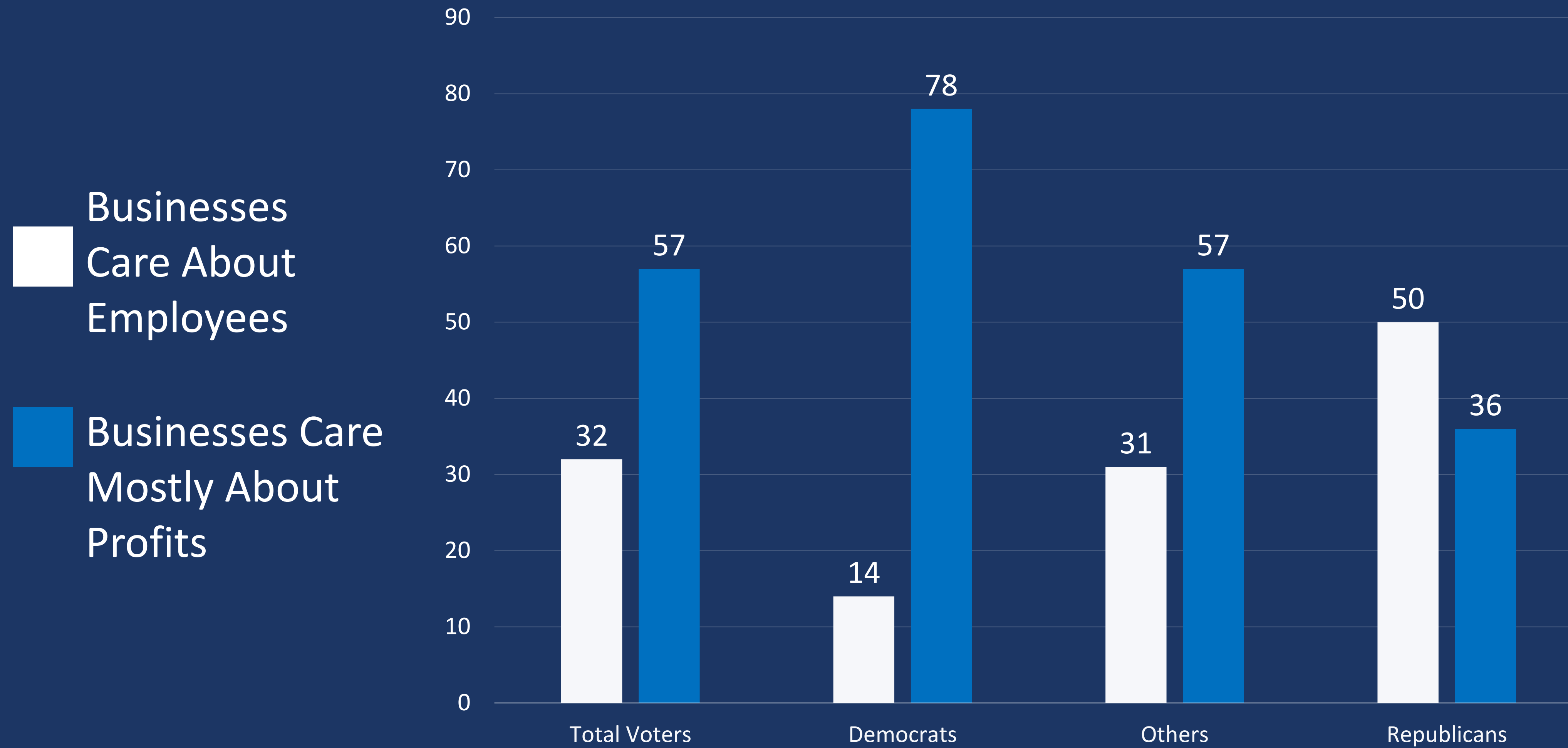
Actions (Lobbying & Grassroots)

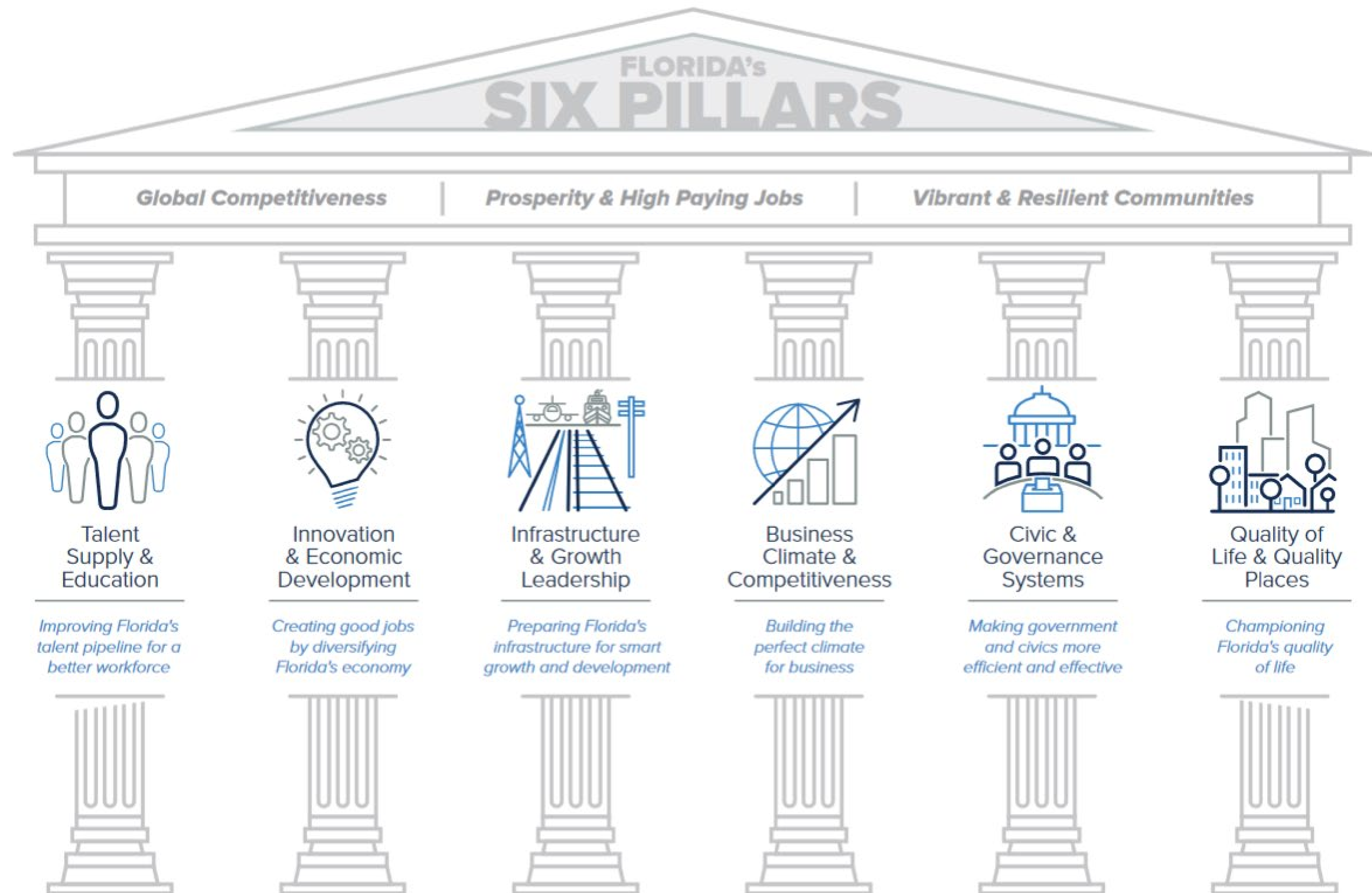


Leadership (Elections)



What Do You Think Motivates Business In Florida?

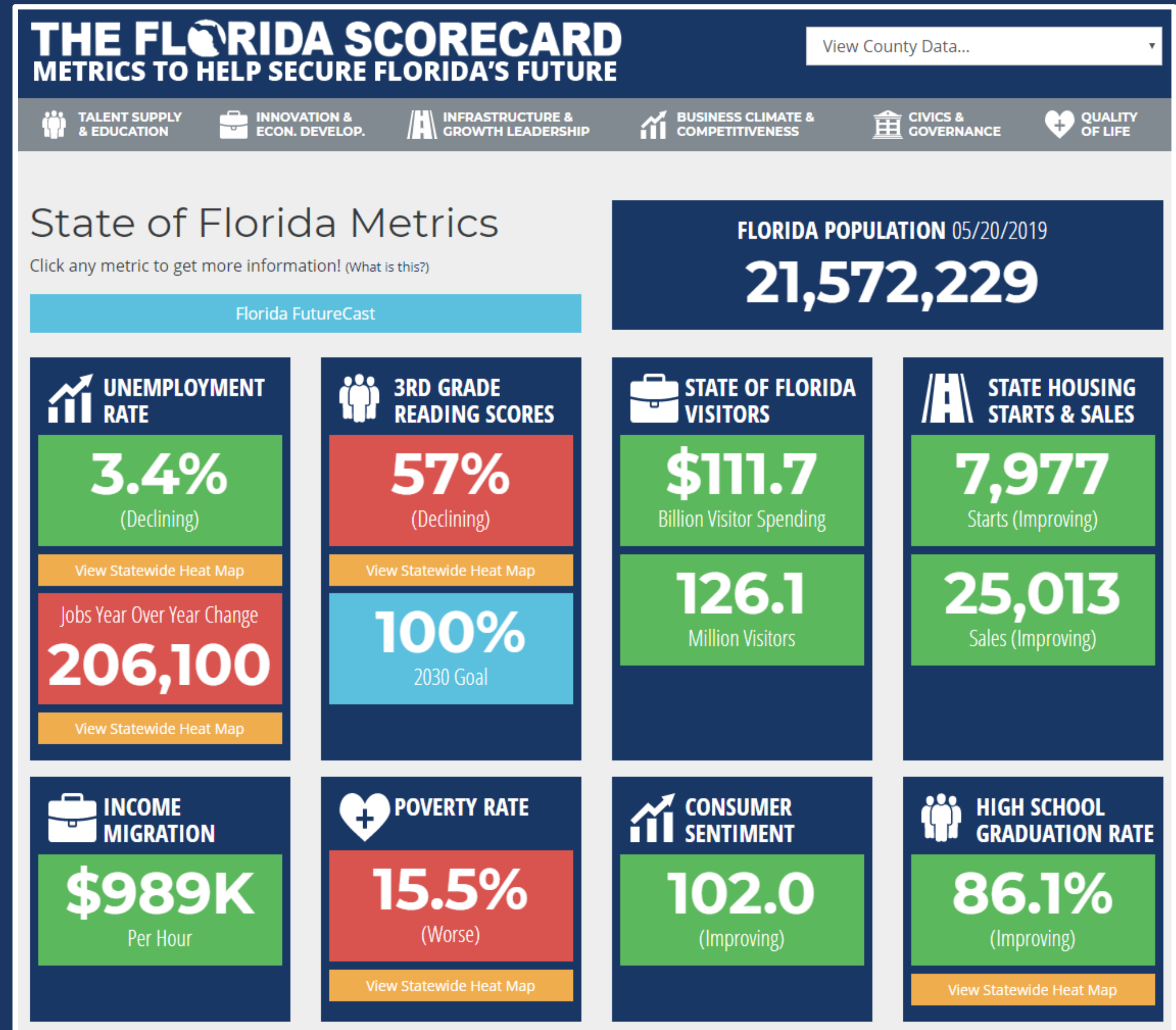




Florida At A Glance

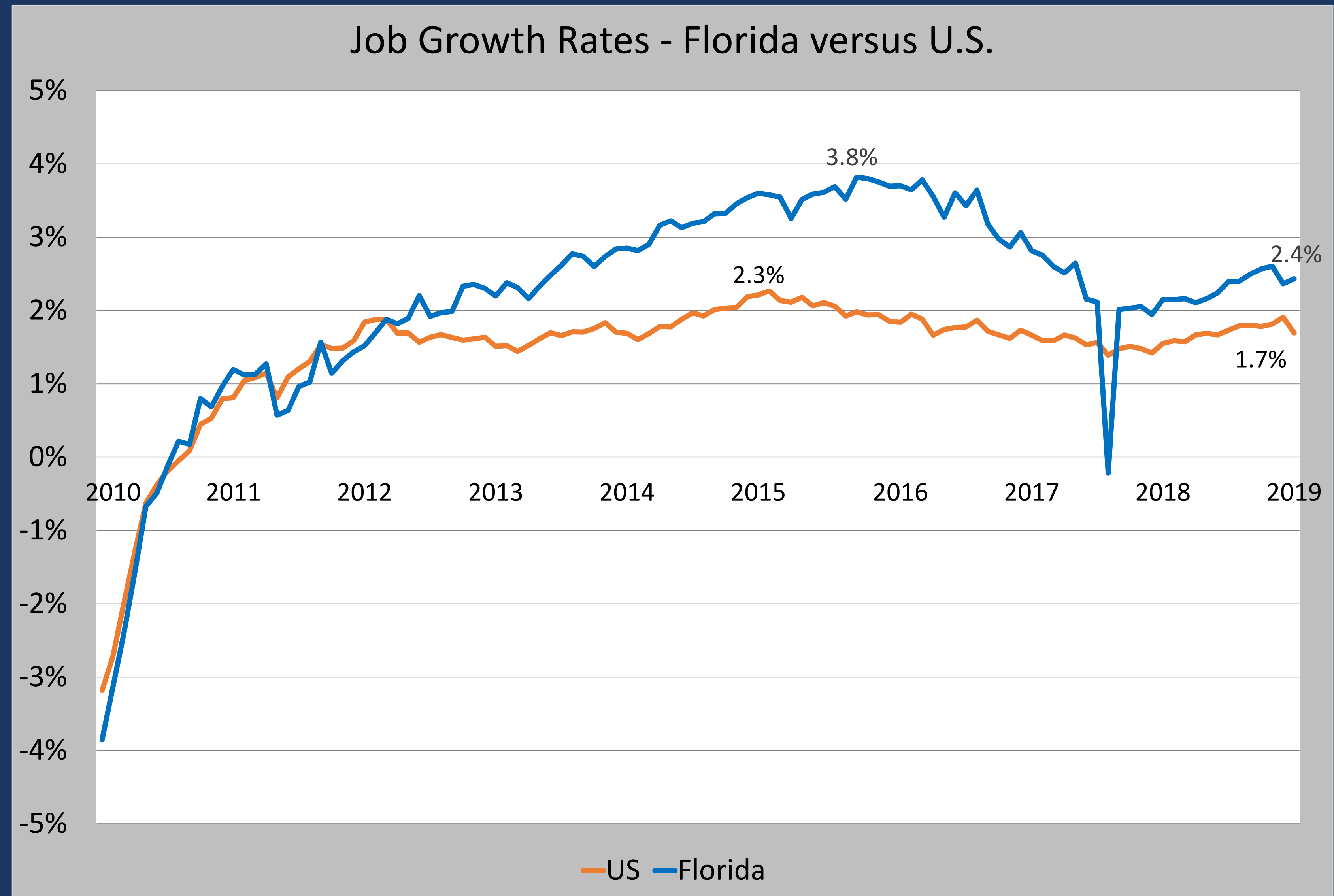
- Florida's Economy \$1 Trillion GDP (17th)
- 21.5 Million Residents
 - 3rd / 26M By 2030 / More Than 900/Day
- 126.1 Million Visitors In 2018 (+50M by 2030)
- Florida Creates 1 Out Of Every 13 New U.S. Jobs
- 281,500 Jobs Looking for People. 357,000 People Looking for Jobs.

www.TheFloridaScorecard.org

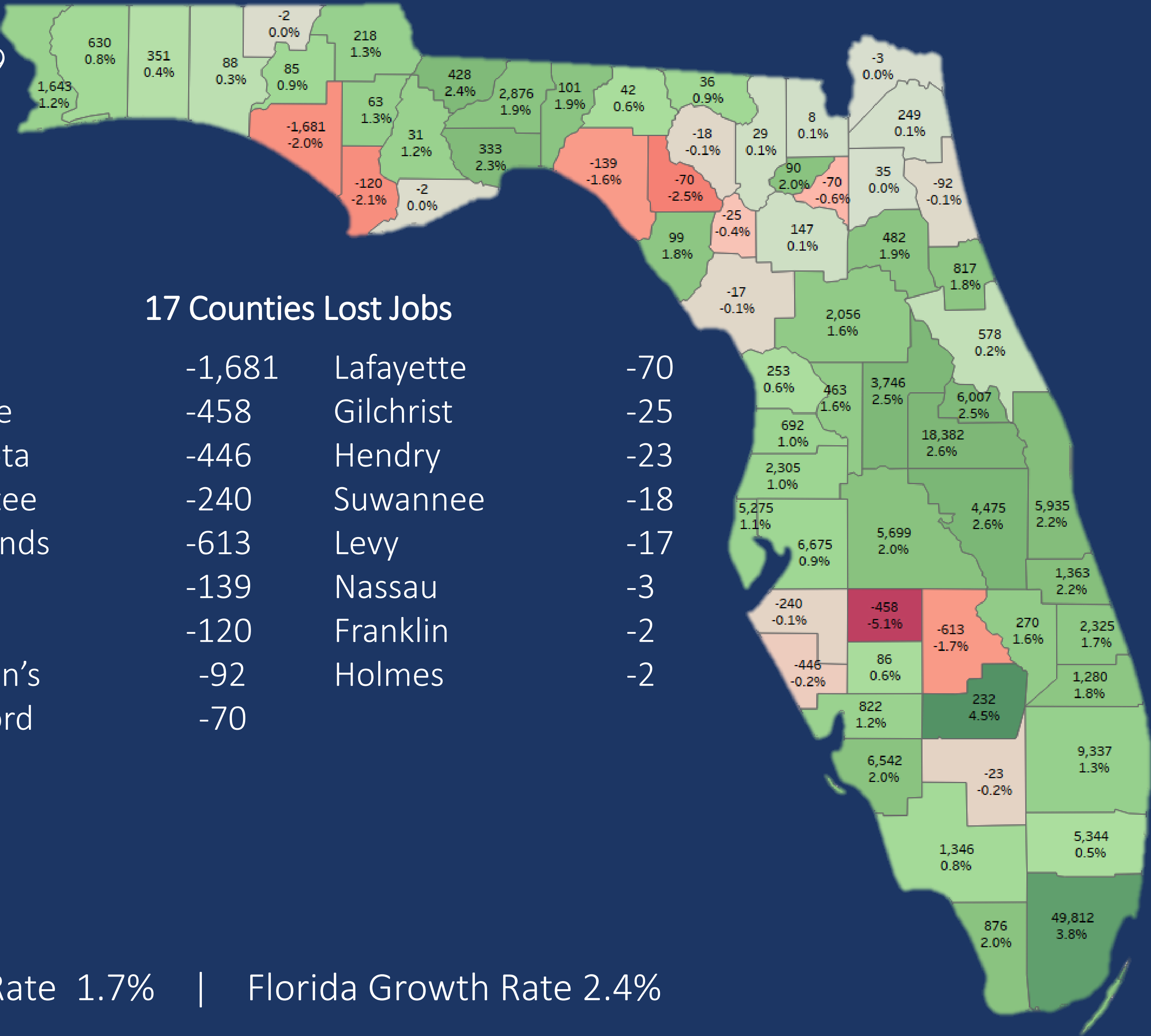


Job Growth from Feb.
18 – Feb. 19:

Florida was #1 in U.S.
at 2.4%



Job Growth: Mar '18 – Mar '19



Top Counties for Jobs

Miami-Dade	49,812
Orange	18,382
Palm Beach	9,337
Hillsborough	6,675
Lee	6,542
Seminole	6,007
Brevard	5,935
Polk	5,699
Broward	5,344
Pinellas	5,275

17 Counties Lost Jobs

Bay	-1,681	Lafayette	-70
Hardee	-458	Gilchrist	-25
Sarasota	-446	Hendry	-23
Manatee	-240	Suwannee	-18
Highlands	-613	Levy	-17
Taylor	-139	Nassau	-3
Gulf	-120	Franklin	-2
St. John's	-92	Holmes	-2
Bradford	-70		

Industry	Jobs – February 2018 thru February 2019	Percent Growth
Professional & Business Services	50,600	3.8%
Education & Health Services	40,700	3.1%
Trade, Transportation & Utilities	32,000	1.8%
Leisure & Hospitality	27,800	2.3%
Construction	22,400	4.2%
Financial Activities	18,300	3.2%
Manufacturing	9,000	2.4%

Job Growth 2007 to 2017

U.S. Job Growth Rate: 6.3%

Florida's Job Growth Rate: 6.9%

26 Florida Counties Lost Jobs between
2007 and 2017 – 38.8%

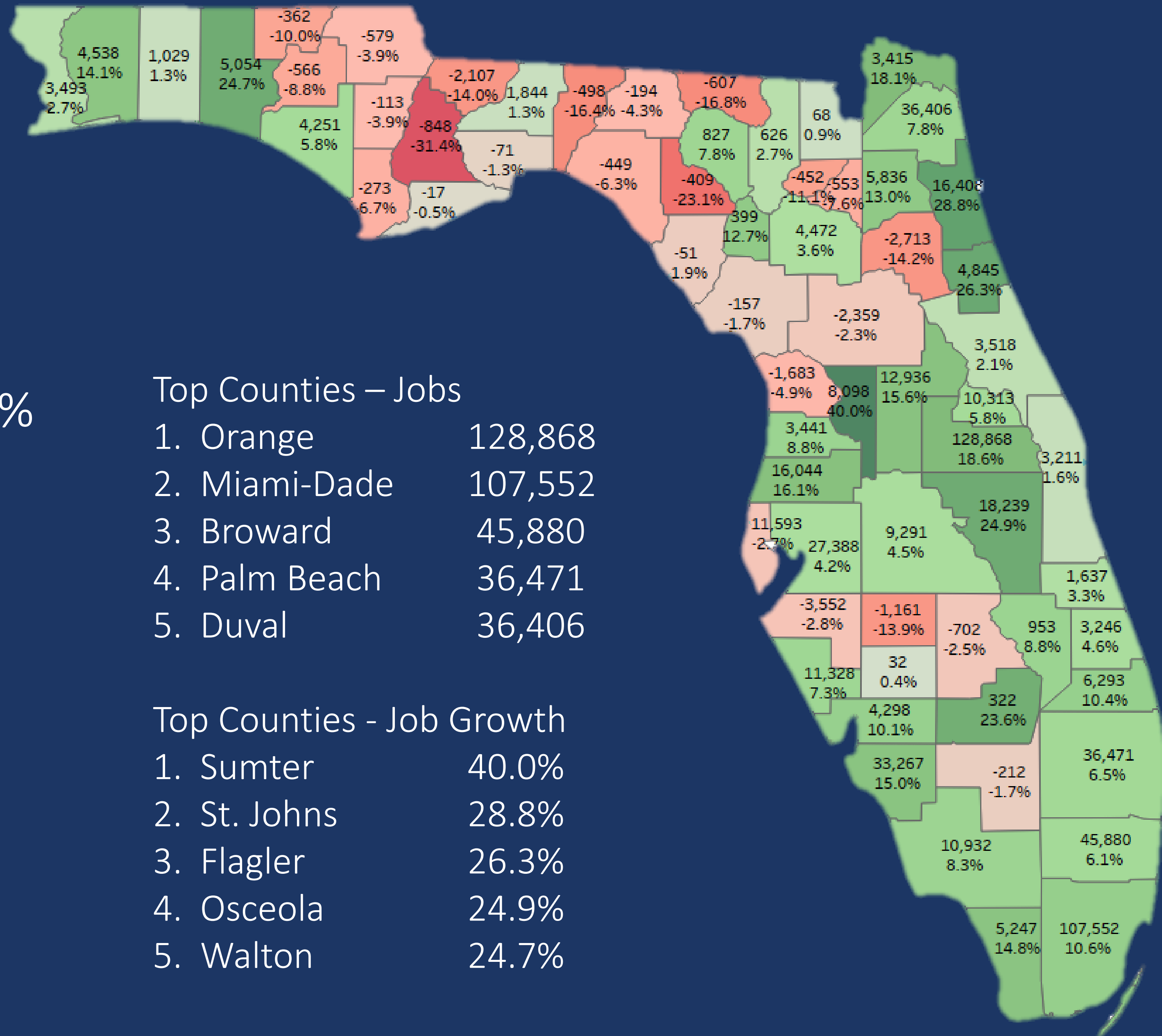
53.2% of U.S. Counties Lost Jobs
between 2007 and 2017

Top Counties – Jobs

1. Orange	128,868
2. Miami-Dade	107,552
3. Broward	45,880
4. Palm Beach	36,471
5. Duval	36,406

Top Counties - Job Growth

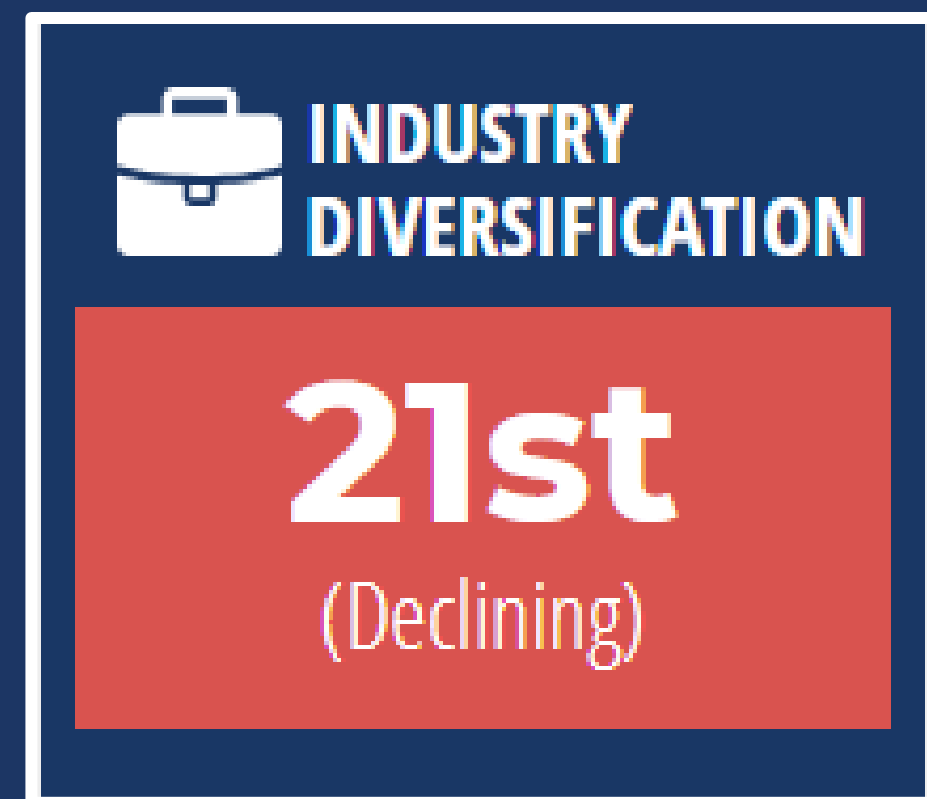
1. Sumter	40.0%
2. St. Johns	28.8%
3. Flagler	26.3%
4. Osceola	24.9%
5. Walton	24.7%



Innovation and Economic Development

Manufacturing: Florida 3.7x U.S. Rate

Florida-current

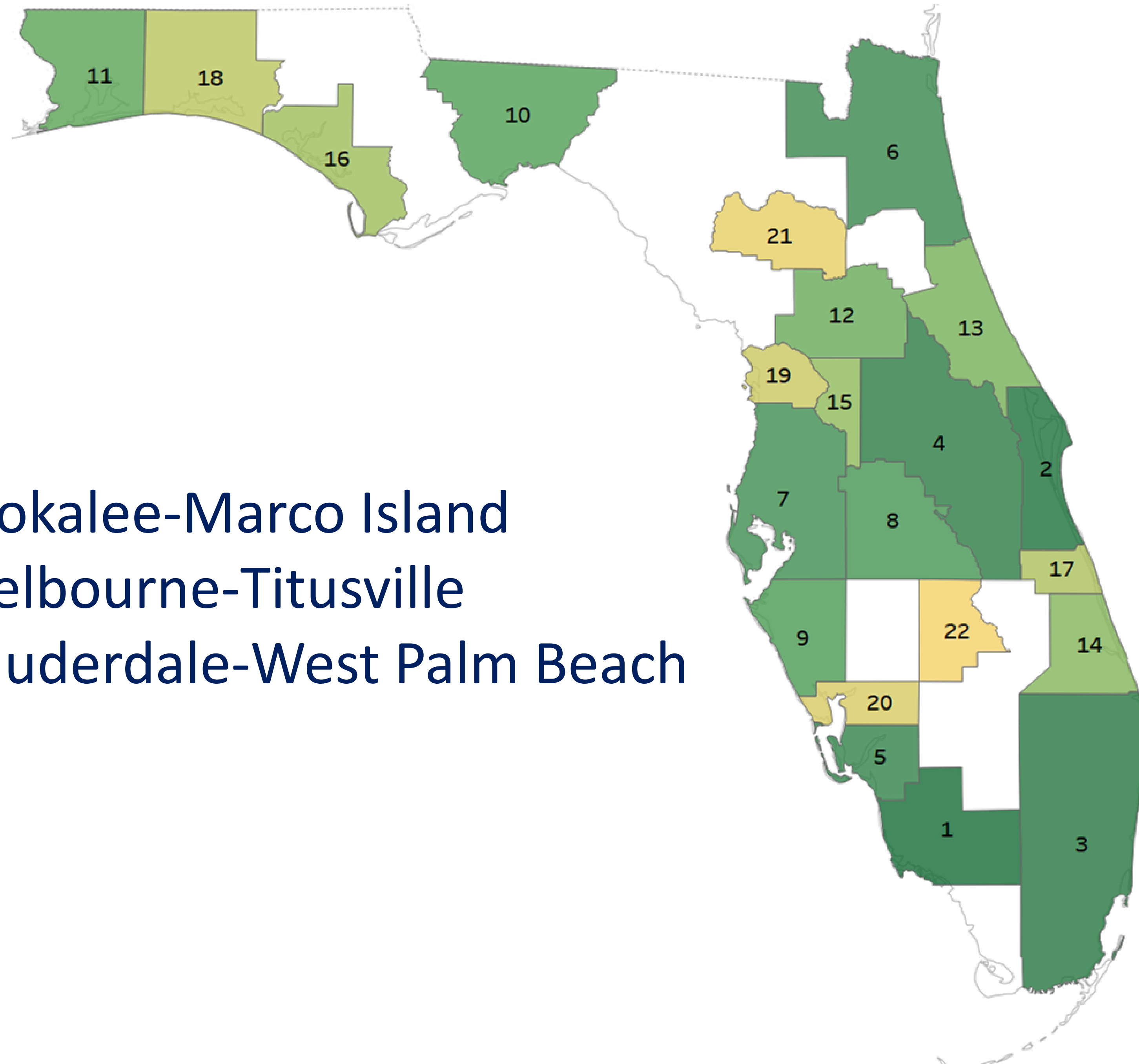


Florida-2017



Florida Industry Diversification by MSA

- #1 Most Diverse – Naples-Immokalee-Marco Island
- #2 Most Diverse – Palm Bay-Melbourne-Titusville
- #3 Most Diverse – Miami-Ft. Lauderdale-West Palm Beach

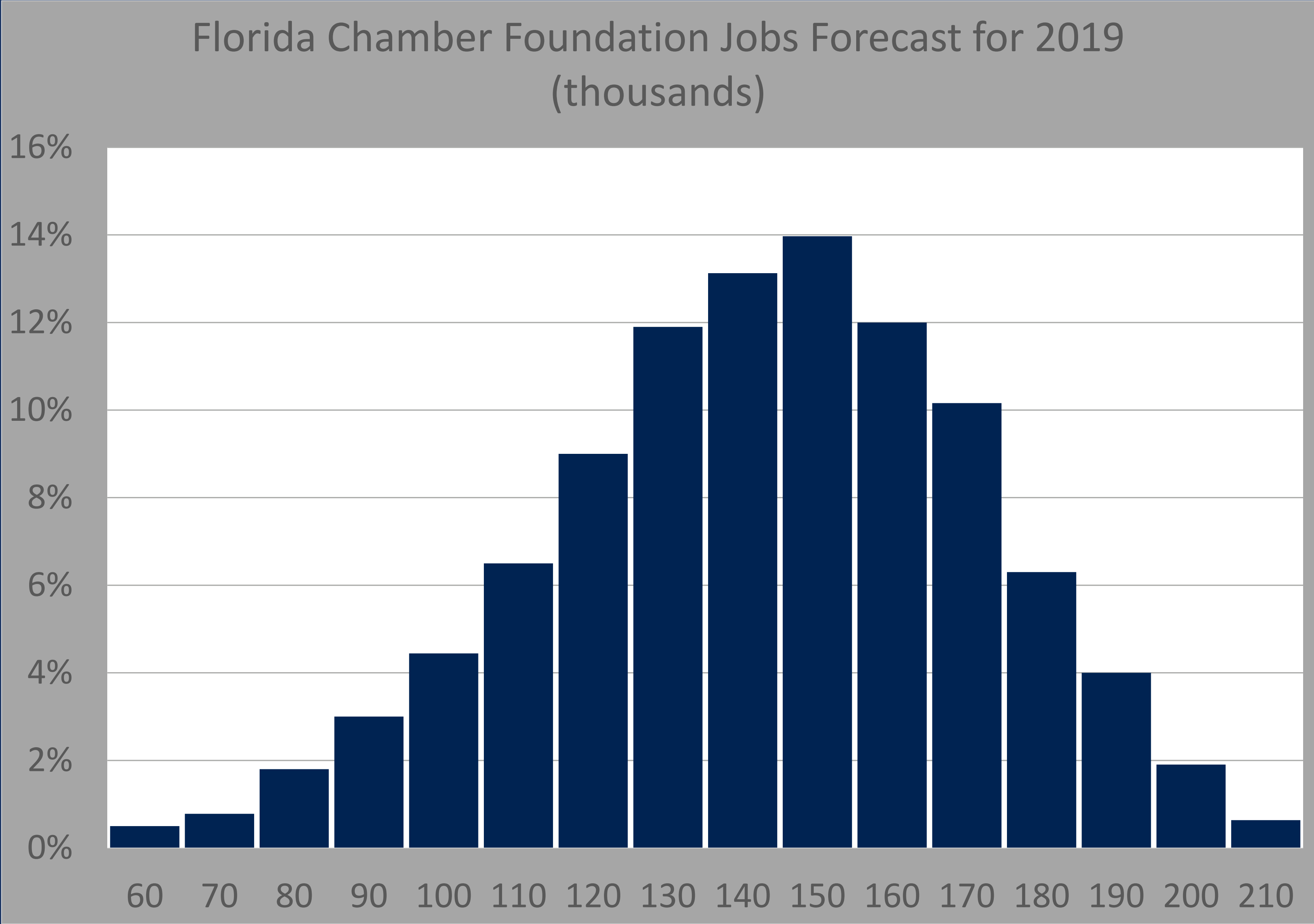


2019 Forecast

150,000 Jobs

70% Probability
between 130,000
and 170,000

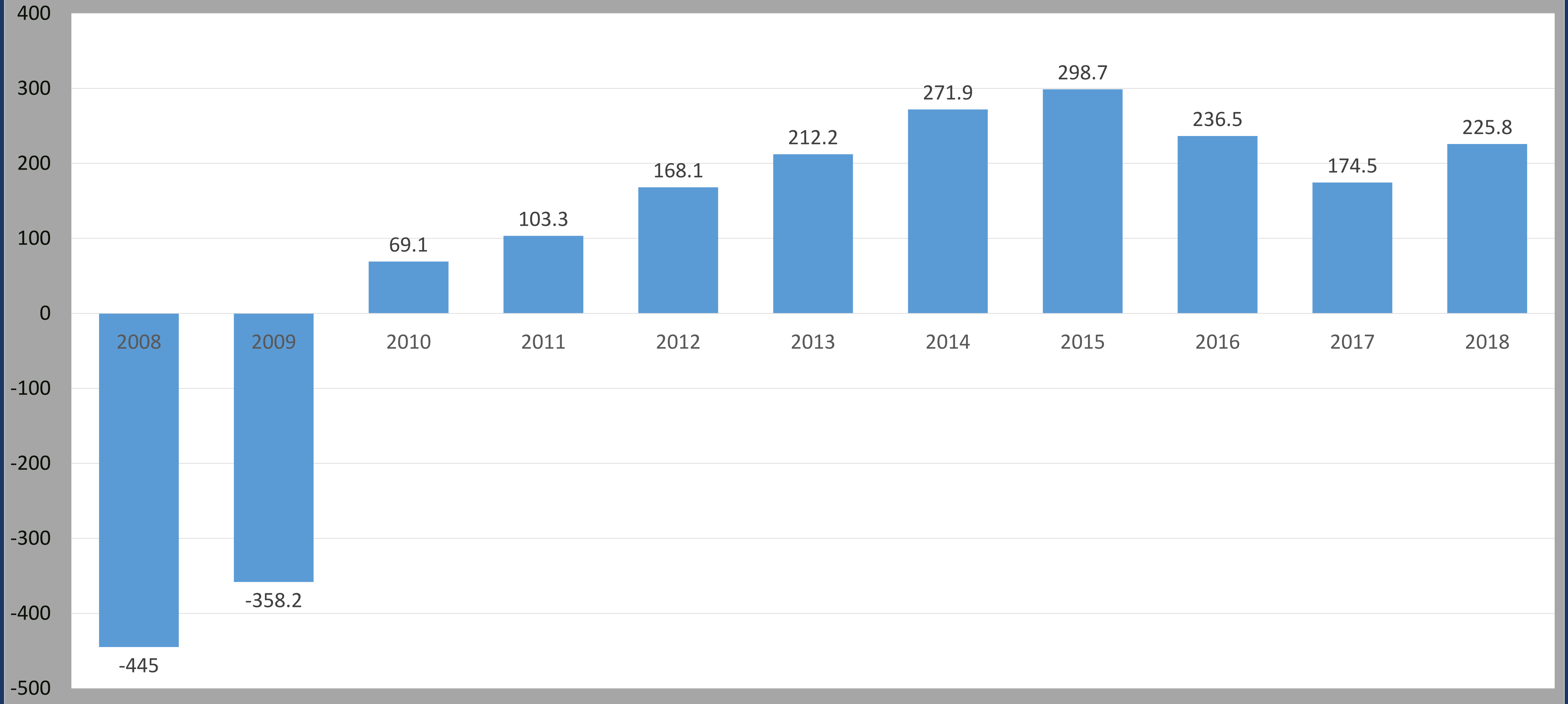
40% Probability
between 140,000
and 160,000



2019 Forecasts

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

Yearly Florida Job Creation
(thousands)



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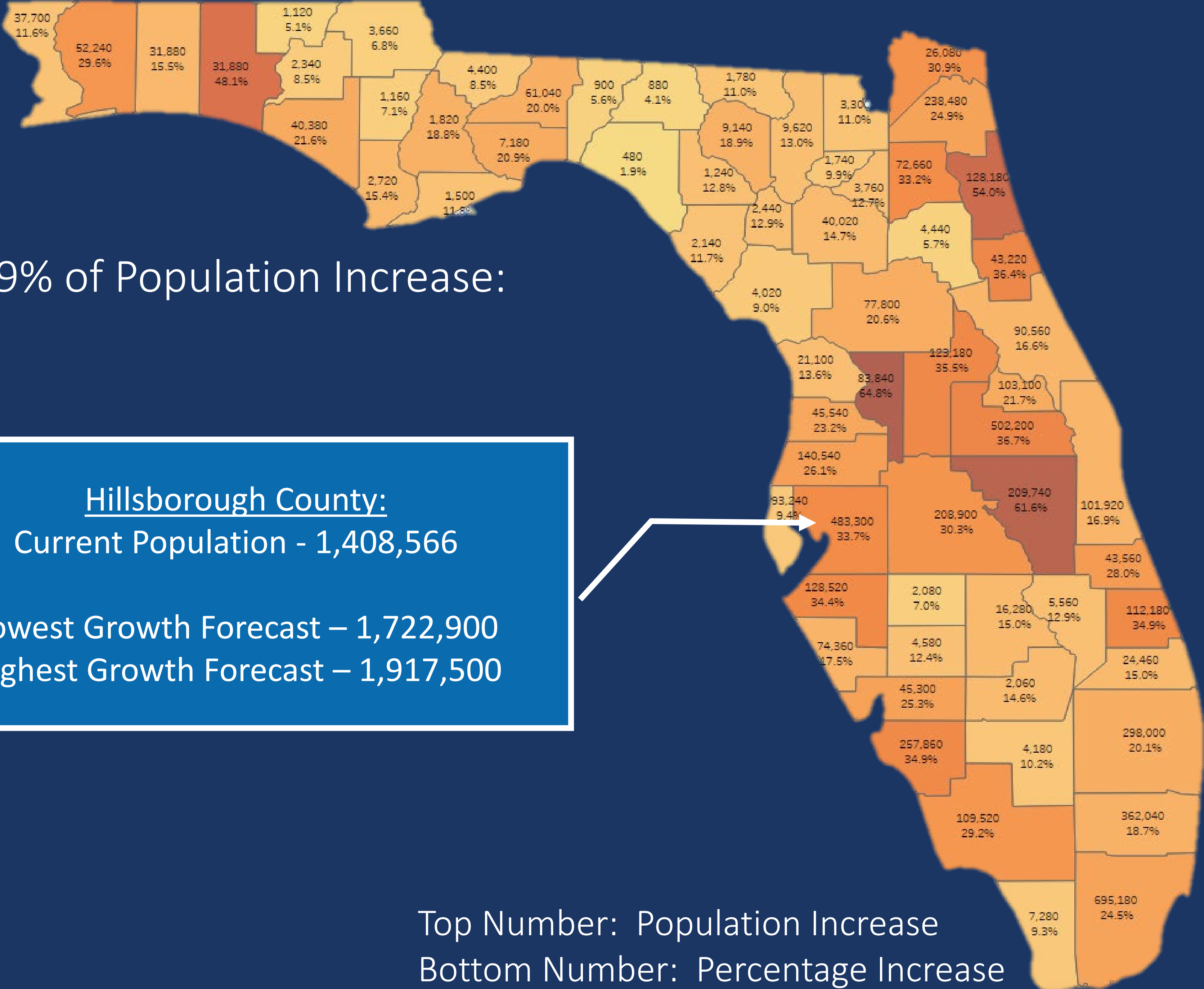
Florida's next 4.5 million People

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

Hillsborough County:
Current Population - 1,408,566

Lowest Growth Forecast – 1,722,900
Highest Growth Forecast – 1,917,500

A map of Florida divided into counties, each labeled with a population increase number and a percentage. The colors range from light yellow to dark red, indicating the magnitude of the increase. Hillsborough County is highlighted with a callout box. An arrow points from the callout box to Hillsborough County on the map.

Top Number: Population Increase
Bottom Number: Percentage Increase

Growth to 2030 by Age Group

Age Group

85+

80-84

75-79

70-74

65-69

60-64

55-59

50-54

45-49

40-44

35-39

30-34

25-29

20-24

15-19

0-14

0%

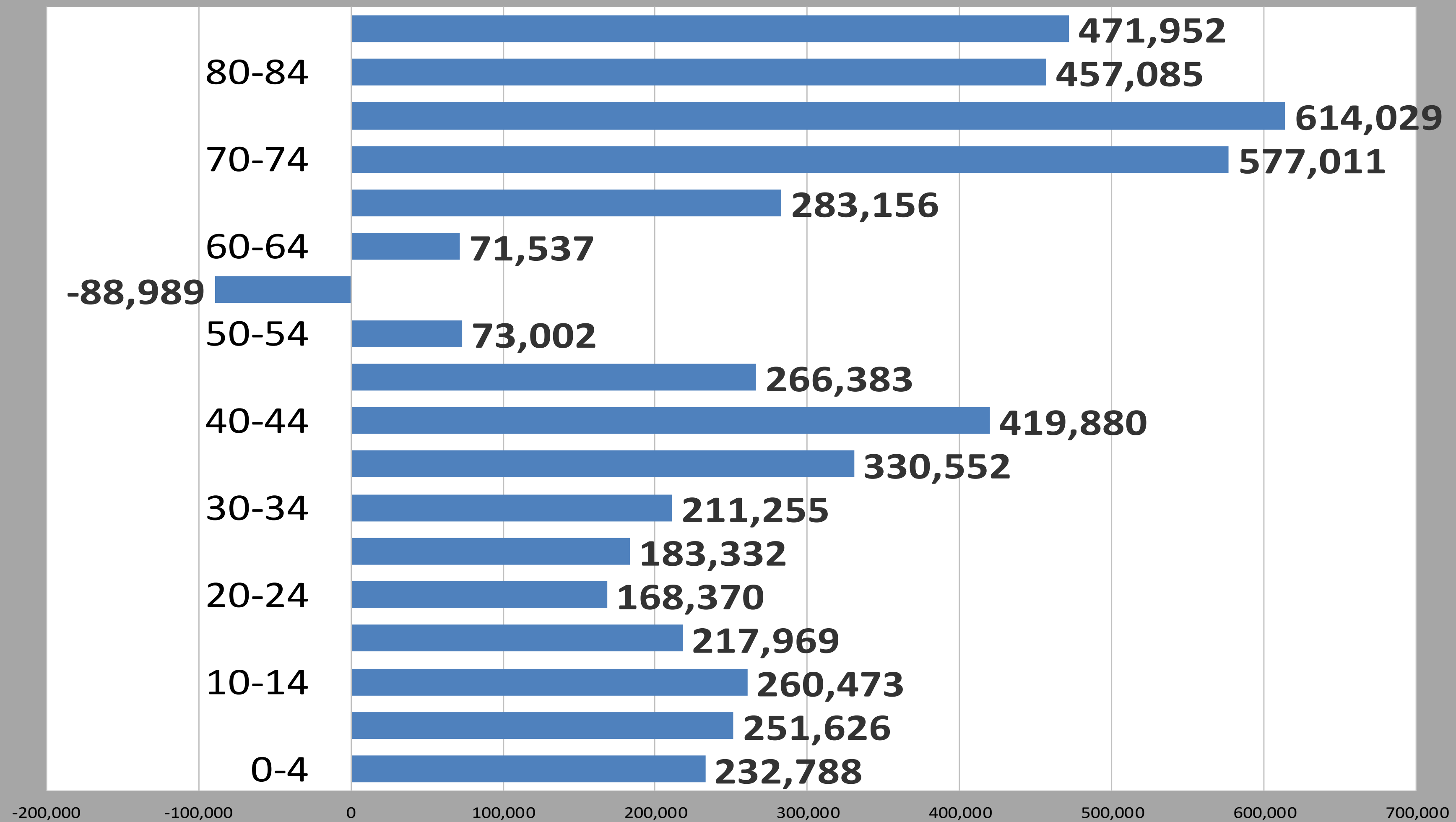
20%

40%

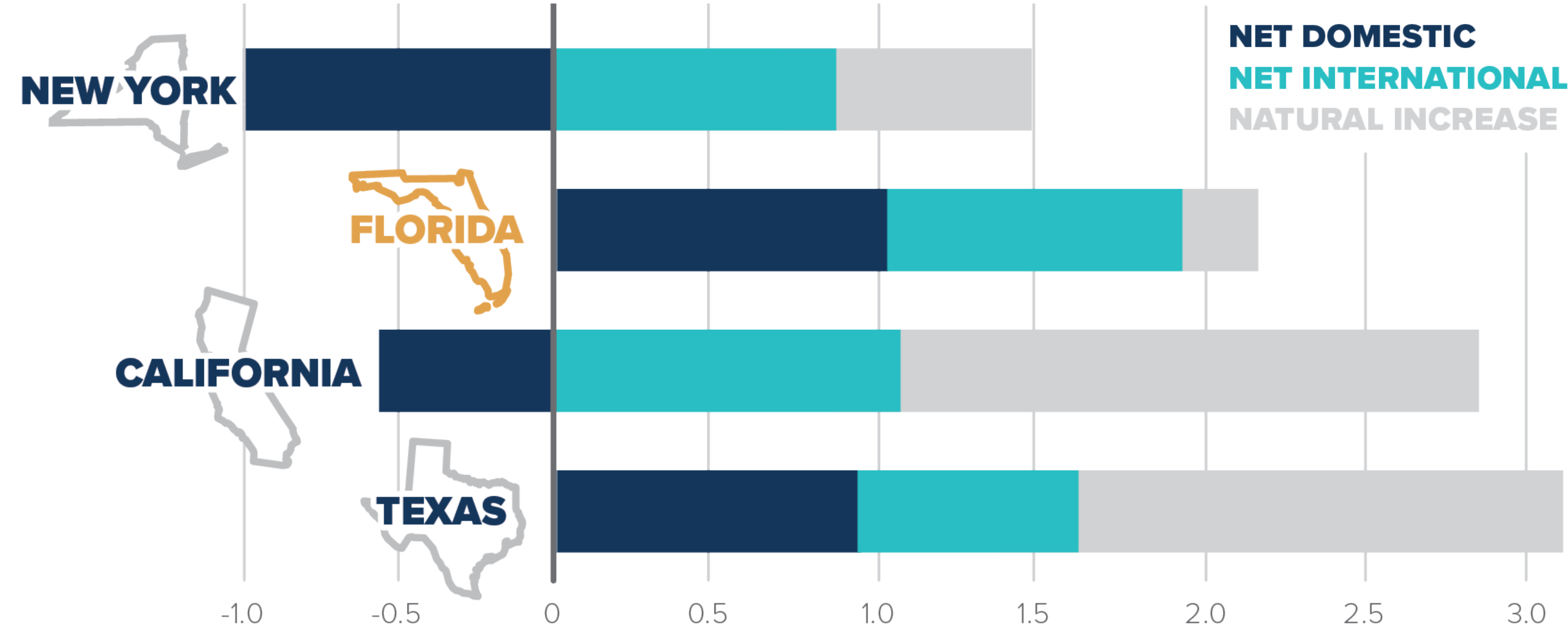
60%

80%

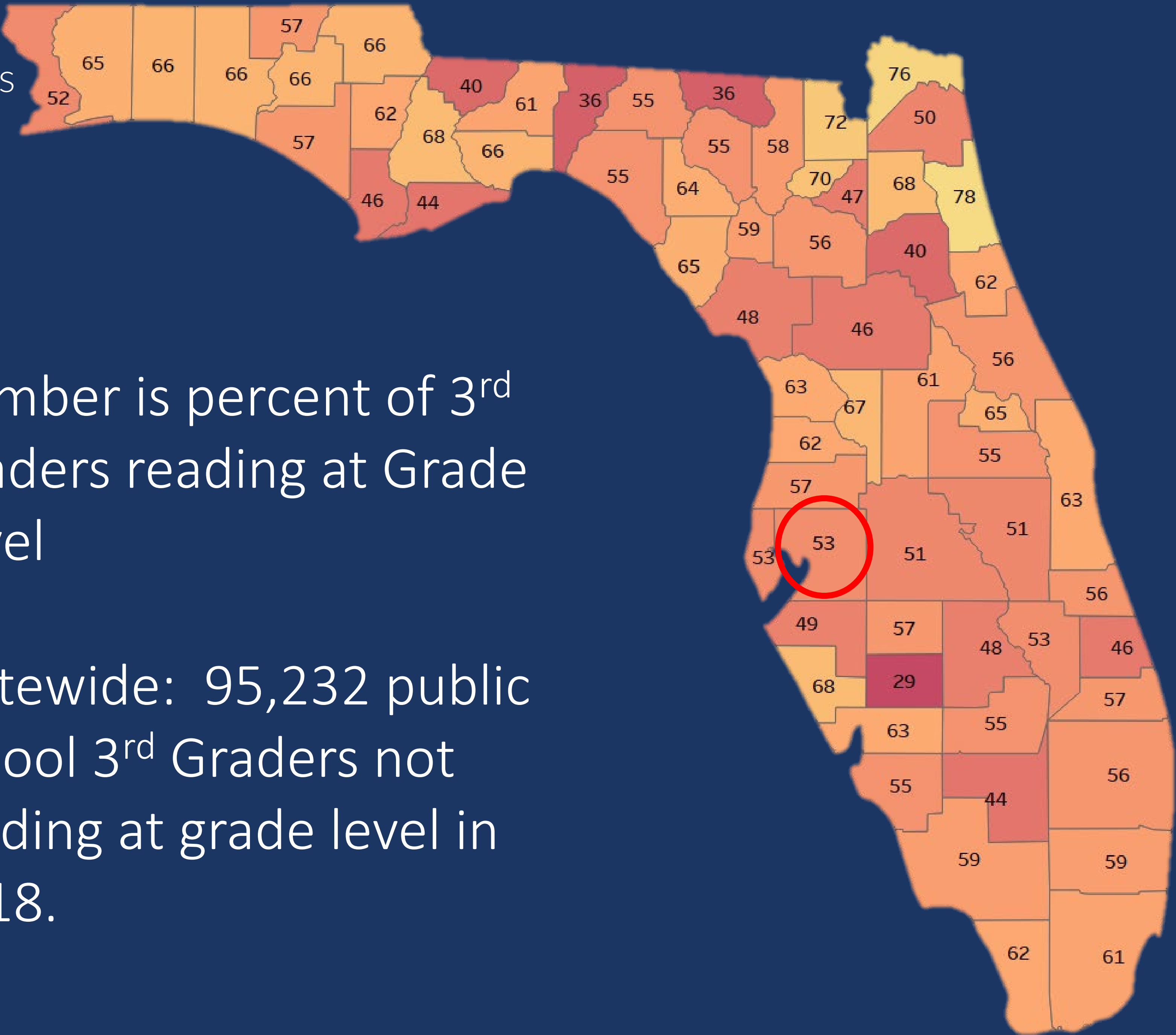
Florida's Next 4.5 Million People by Age Group



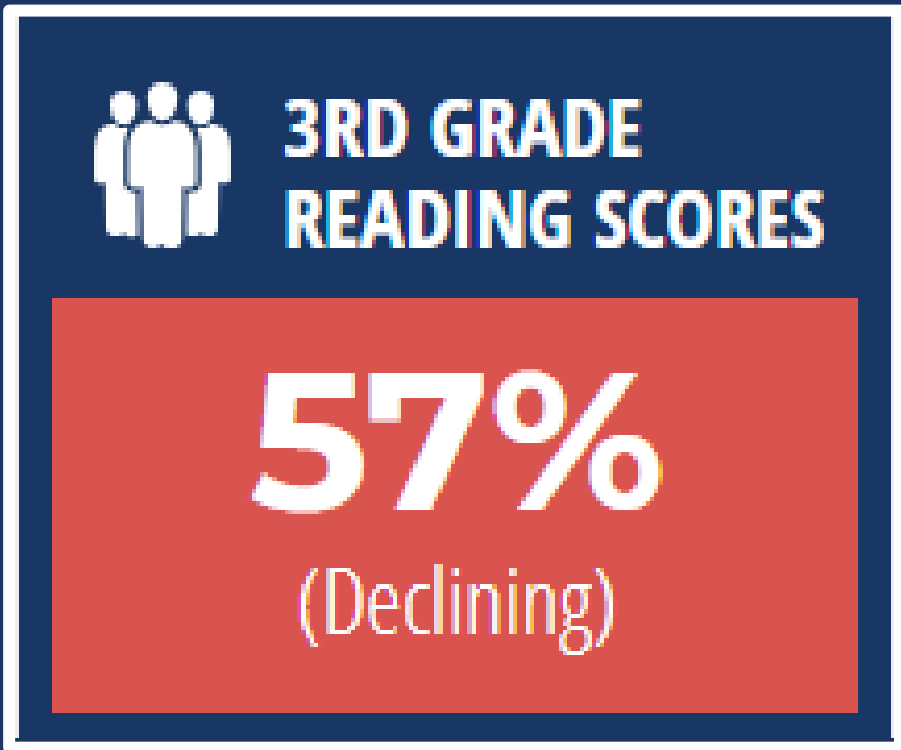
Where Does Florida's Growth Come From?



Florida's 2018 3rd Grade Reading Scores

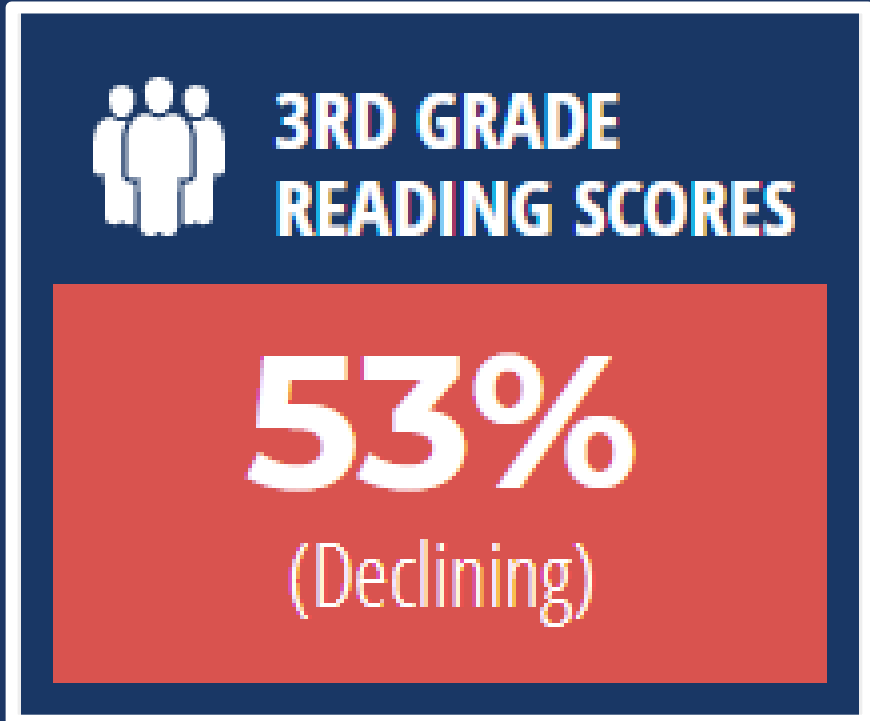


Florida

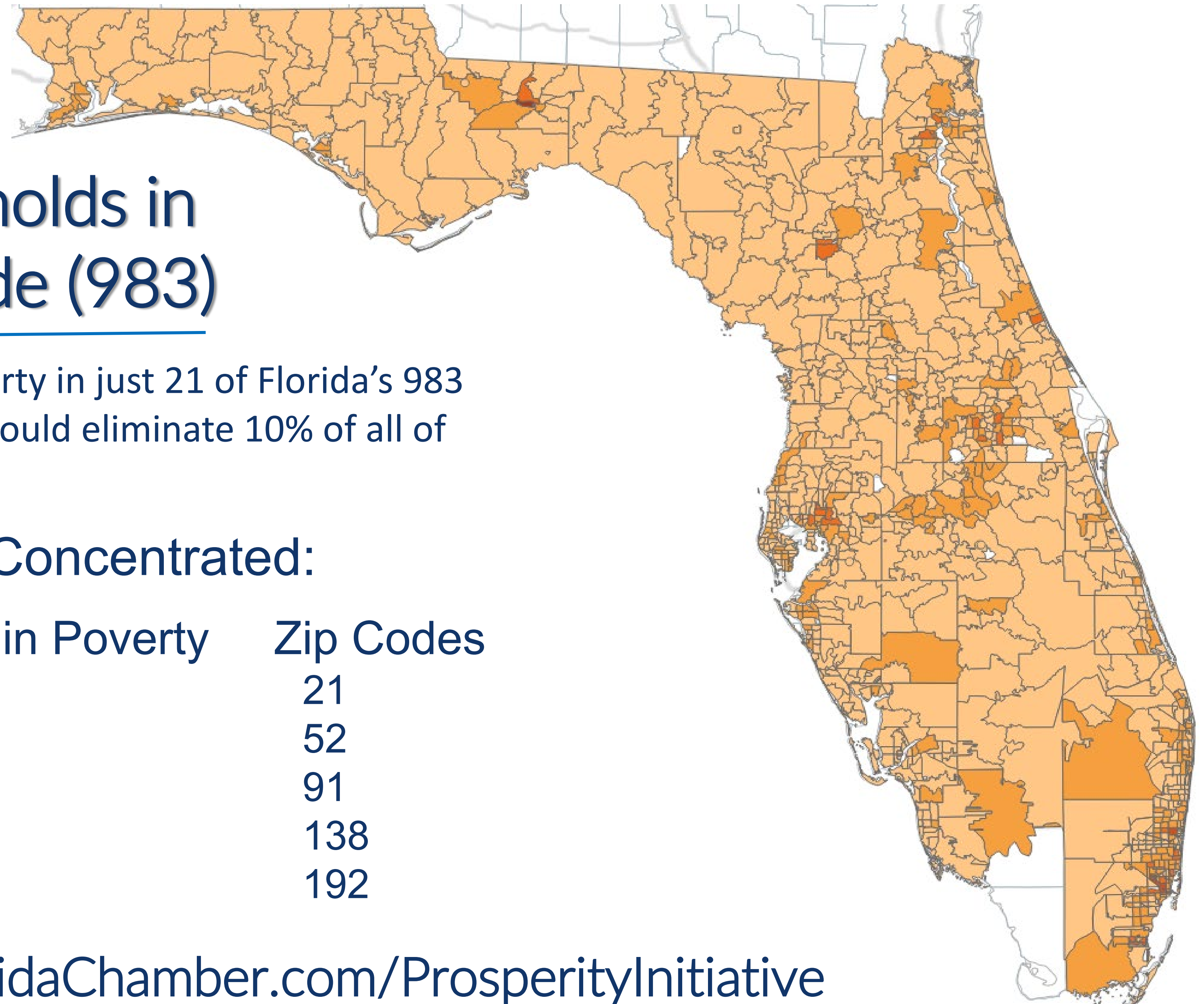


Number is percent of 3rd Graders reading at Grade Level

Hillsborough County



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



Number of Households in Poverty by Zip Code (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:

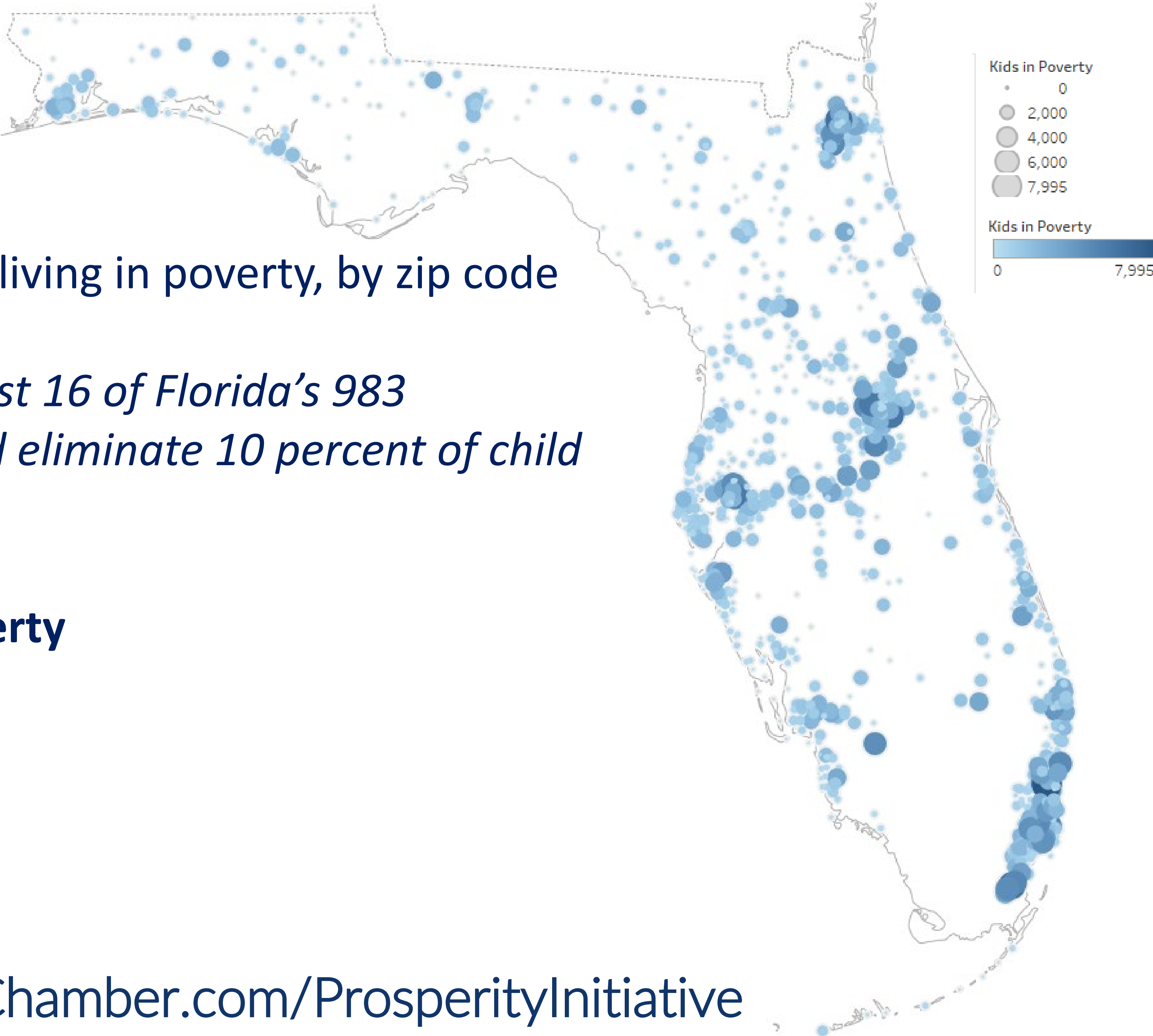
Households in Poverty	Zip Codes
10%	21
20%	52
30%	91
40%	138
50%	192

Kids in Poverty in Florida

Number of 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%



Under-18 Poverty by Zip Code for Hillsborough County

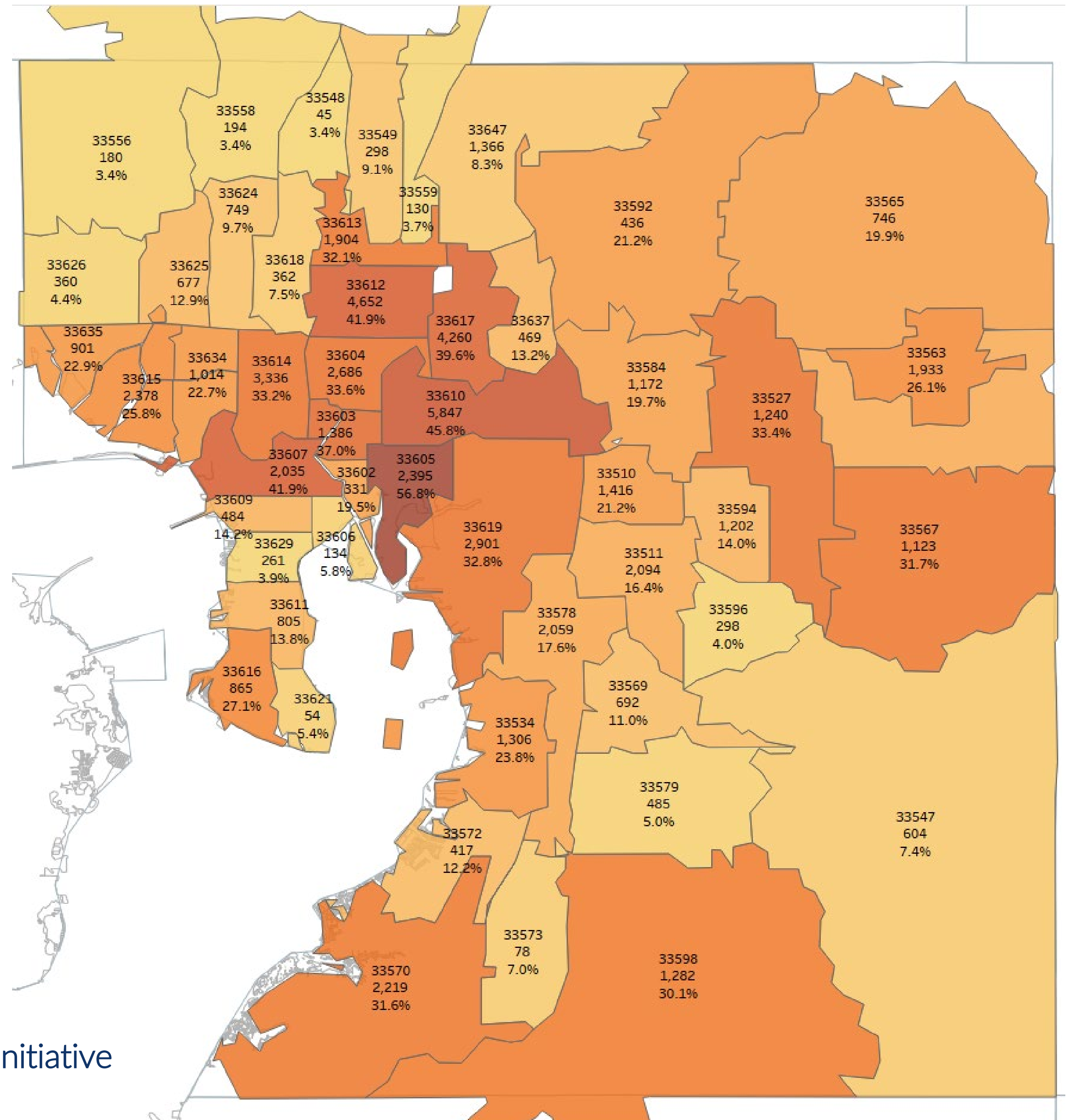
901,772 kids in poverty in Florida – 22.3%

64,783 kids in poverty in Hillsborough County
– 21.2%

Top Number: Zip Code

Middle Number: Number of kids in poverty

Bottom Number: Under-18 poverty rate



Hillsborough County Public School 3rd Grade Reading Scores – 8,399 kids not reading at grade level

School Name	Score	Kids Not Reading at 3rd Grade Level
WARREN HOPE DAWSON ELEMENTARY	52	47
FOREST HILLS ELEMENTARY SCHOOL	27	123
SHEEHY ELEMENTARY SCHOOL	26	69
CORR ELEMENTARY SCHOOL	40	86
DAVIS ELEMENTARY SCHOOL	39	85
FISHHAWK CREEK ELEMENTARY SCHOOL	84	25
MACFARLANE PARK ELEMENTARY MAGNET SCHOOL	84	11
COLLINS ELEMENTARY SCHOOL	58	77
TURNER-BARTELS K-8 SCHOOL	65	71
FROST ELEMENTARY SCHOOL	60	32
DOBY ELEMENTARY SCHOOL	70	40
ALEXANDER ELEMENTARY SCHOOL	55	50
SUMMERFIELD CROSSINGS ELEMENTARY SCHOOL	53	78
STOWERS ELEMENTARY SCHOOL	81	24
BAILEY ELEMENTARY SCHOOL	41	81
DEER PARK ELEMENTARY SCHOOL	78	41
HAMMOND ELEMENTARY SCHOOL	79	21
REDDICK ELEMENTARY SCHOOL	33	111
MOSI PARTNERSHIP ELEMENTARY SCHOOL	42	21
KIMBELL ELEMENTARY SCHOOL	24	74
ANDERSON ELEMENTARY SCHOOL	63	23
USF/PATEL PARTNERSHIP ELEMENTARY SCHOOL	56	14
PATRICIA SULLIVAN METROPOLITAN MINISTRIES	23	17
THOMPSON ELEMENTARY	33	93
LAMB ELEMENTARY	35	85
APOLLO BEACH ELEMENTARY SCHOOL	77	23
BALLAST POINT ELEMENTARY SCHOOL	78	17
BAY CREST ELEMENTARY SCHOOL	41	81
BING ELEMENTARY SCHOOL	39	60
ALAFIA ELEMENTARY SCHOOL	75	30
JUST ELEMENTARY SCHOOL	14	57
BOYETTE SPRINGS ELEMENTARY SCHOOL	70	40
BEVIS ELEMENTARY SCHOOL	90	14
BROOKER ELEMENTARY SCHOOL	59	66
BROWARD ELEMENTARY SCHOOL	15	56
BRYAN ELEMENTARY SCHOOL	35	81
BRYANT ELEMENTARY SCHOOL	82	30
BUCKHORN ELEMENTARY SCHOOL	67	35
BURNEY ELEMENTARY SCHOOL	32	47
CAHOON ELEMENTARY MAGNET SCHOOL	54	19
CANNELLA ELEMENTARY SCHOOL	57	55
CARROLLWOOD ELEMENTARY SCHOOL	70	45
CHIARAMONTE ELEMENTARY SCHOOL	55	23
CHILES ELEMENTARY SCHOOL	78	31

School Name	Score	Kids Not Reading at 3rd Grade Level
CITRUS PARK ELEMENTARY SCHOOL	64	29
CIMINO ELEMENTARY SCHOOL	68	45
CLAIR-MEL ELEMENTARY SCHOOL	45	52
CLARK ELEMENTARY SCHOOL	76	33
CLAYWELL ELEMENTARY SCHOOL	66	46
CLEVELAND ELEMENTARY SCHOOL	37	38
COLSON ELEMENTARY SCHOOL	42	75
LOCKHART ELEMENTARY MAGNET SCHOOL	33	39
CORK ELEMENTARY SCHOOL	62	42
CRESTWOOD ELEMENTARY SCHOOL	44	98
CYPRESS CREEK ELEMENTARY SCHOOL	45	89
DESOTO ELEMENTARY SCHOOL	33	24
DICKENSON ELEMENTARY SCHOOL	60	38
DOVER ELEMENTARY SCHOOL	35	70
DUNBAR ELEMENTARY MAGNET SCHOOL	54	23
EDISON ELEMENTARY SCHOOL	22	57
EGYPT LAKE ELEMENTARY SCHOOL	47	48
ESSRIG ELEMENTARY SCHOOL	63	37
FOLSOM ELEMENTARY SCHOOL	33	60
FOSTER ELEMENTARY SCHOOL	25	63
GIBSONTON ELEMENTARY SCHOOL	35	59
GORRIE ELEMENTARY SCHOOL	84	17
GRADY ELEMENTARY SCHOOL	82	15
GRAHAM ELEMENTARY SCHOOL	30	46
BELLAMY ELEMENTARY SCHOOL	46	58
HERITAGE ELEMENTARY SCHOOL	69	34
HUNTER'S GREEN ELEMENTARY SCHOOL	63	46
IPPOLITO ELEMENTARY SCHOOL	43	48
JACKSON ELEMENTARY SCHOOL	35	63
KENLY ELEMENTARY SCHOOL	23	93
KINGSWOOD ELEMENTARY SCHOOL	53	44
KNIGHTS ELEMENTARY SCHOOL	46	60
LAKE MAGDALENE ELEMENTARY SCHOOL	52	65
LANIER ELEMENTARY SCHOOL	53	23
LEE ELEMENTARY MAGNET SCHOOL	48	28
LIMONA ELEMENTARY SCHOOL	70	35
LINCOLN ELEMENTARY MAGNET SCHOOL	78	14
LEWIS ELEMENTARY SCHOOL	45	72
LITHIA SPRINGS ELEMENTARY SCHOOL	71	33
LOMAX MAGNET ELEMENTARY SCHOOL	59	29
LOPEZ ELEMENTARY SCHOOL	59	37
LOWRY ELEMENTARY SCHOOL	69	54
LUTZ ELEMENTARY SCHOOL	68	30
MABRY ELEMENTARY SCHOOL	82	21

School Name	Score	Kids Not Reading at 3rd Grade Level
MANGO ELEMENTARY SCHOOL	46	55
MANISCALCO ELEMENTARY SCHOOL	53	40
MCDONALD ELEMENTARY SCHOOL	25	92
MENDENHALL ELEMENTARY SCHOOL	42	52
MILES ELEMENTARY SCHOOL	28	130
MINTZ ELEMENTARY SCHOOL	58	56
MITCHELL ELEMENTARY SCHOOL	75	30
MCKITRICK ELEMENTARY SCHOOL	84	28
MORGAN WOODS ELEMENTARY SCHOOL	46	45
MORT ELEMENTARY SCHOOL	35	116
NELSON ELEMENTARY SCHOOL	59	62
NORTHWEST ELEMENTARY SCHOOL	83	16
OAK GROVE ELEMENTARY SCHOOL	45	92
MULLER ELEMENTARY MAGNET SCHOOL	48	26
OAK PARK ELEMENTARY SCHOOL	17	86
PALM RIVER ELEMENTARY SCHOOL	35	49
PINECREST ELEMENTARY SCHOOL	45	49
PIZZO ELEMENTARY SCHOOL	24	89
PRIDE ELEMENTARY SCHOOL	78	32
POTTER ELEMENTARY SCHOOL	15	89
RIVERHILLS ELEMENTARY MAGNET SCHOOL	66	23
RIVERVIEW ELEMENTARY SCHOOL	54	38
ROBINSON ELEMENTARY SCHOOL	44	59
ROBLES ELEMENTARY SCHOOL	22	87
ROOSEVELT ELEMENTARY SCHOOL	83	20
ROLAND PARK K-8 MAGNET SCHOOL	72	20
RUSKIN ELEMENTARY SCHOOL	32	104
SCHMIDT ELEMENTARY SCHOOL	34	73
SCHWARZKOPF ELEMENTARY SCHOOL	77	25
SEFFNER ELEMENTARY SCHOOL	53	46
SEMINOLE ELEMENTARY SCHOOL	40	44
SESSUMS ELEMENTARY SCHOOL	63	80
SHAW ELEMENTARY SCHOOL	18	107
SHORE ELEMENTARY MAGNET SCHOOL	53	30
SPRINGHEAD ELEMENTARY SCHOOL	46	92
SULPHUR SPRINGS K-8 SCHOOL	16	123
SUMMERFIELD ELEMENTARY SCHOOL	55	58
SYMMES ELEMENTARY SCHOOL	51	46
TAMPA BAY BOULEVARD ELEMENTARY SCHOOL	42	75
RAMPELLO K-8 MAGNET SCHOOL	77	16
TAMPA PALMS ELEMENTARY SCHOOL	74	43
TEMPLE TERRACE ELEMENTARY SCHOOL	32	78
THONOTOSASSA ELEMENTARY SCHOOL	28	55
TINKER K-8 SCHOOL	75	18

School Name	Score	Kids Not Reading at 3rd Grade Level
TOWN & COUNTRY ELEMENTARY SCHOOL	43	28
TRAPNELL ELEMENTARY SCHOOL	45	46
TWIN LAKES ELEMENTARY SCHOOL	35	83
VALRICO ELEMENTARY SCHOOL	69	38
WALDEN LAKE ELEMENTARY SCHOOL	61	60
WASHINGTON ELEMENTARY SCHOOL	15	87
WESTCHASE ELEMENTARY SCHOOL	84	24
WESTSHORE ELEMENTARY SCHOOL	64	22
WEST TAMPA ELEMENTARY SCHOOL	37	34
JAMES ELEMENTARY SCHOOL	21	103
WILSON ELEMENTARY SCHOOL	43	32
WIMAUMA ELEMENTARY SCHOOL	40	74
WITTER ELEMENTARY SCHOOL	37	54
WOODBIDGE ELEMENTARY SCHOOL	36	70
YATES ELEMENTARY SCHOOL	38	72
VILLAGE OF EXCELLENCE ACADEMY	8	46
PEPIN ACADEMIES	0	39
LEARNING GATE COMMUNITY SCHOOL	67	28
RCMA WIMAUMA ACADEMY	47	20
HORIZON CHARTER SCHOOL OF TAMPA	50	11
LEGACY PREPARATORY ACADEMY	88	2
WALTON ACADEMY	51	17
TRINITY SCHOOL FOR CHILDREN	74	20
LITERACY/LEADERSHIP/TECHNOLOGY ACADEMY	70	11
KIDS COMMUNITY COLLEGE RIVERVIEW SOUTH	75	14
INDEPENDENCE ACADEMY	63	40
COMMUNITY CHARTER SCHOOL OF EXCELLENCE	27	16
ADVANTAGE ACADEMY OF HILLSBOROUGH	63	16
VALRICO LAKE ADVANTAGE ACADEMY	66	48
CHANNELSIDE ACADEMY OF MATH AND SCIENCE	71	25
WOODMONT CHARTER SCHOOL	41	57
LUTZ PREPARATORY SCHOOL	90	9
NEW SPRINGS SCHOOLS	40	35
WINTHROP CHARTER SCHOOL	72	39
HENDERSON HAMMOCK CHARTER SCHOOL	57	48
KIDS COMMUNITY COLLEGE CHARTER SE	76	16
HILLSBOROUGH ACADEMY OF MATH AND SCIENCE	55	40
BRIDGEPREP ACADEMY OF TAMPA	61	15
SUNLAKE ACADEMY OF MATH AND SCIENCES	79	12
WATERSET CHARTER SCHOOL	75	23
SOUTHSHORE CHARTER ACADEMY	72	30
AVANT GARDE ACADEMY WESTCHASE	60	12
BRIDGEPREP ACADEMY OF RIVERVIEW	49	42
THE COLLABORATORY PREPARATORY ACADEMY	24	13

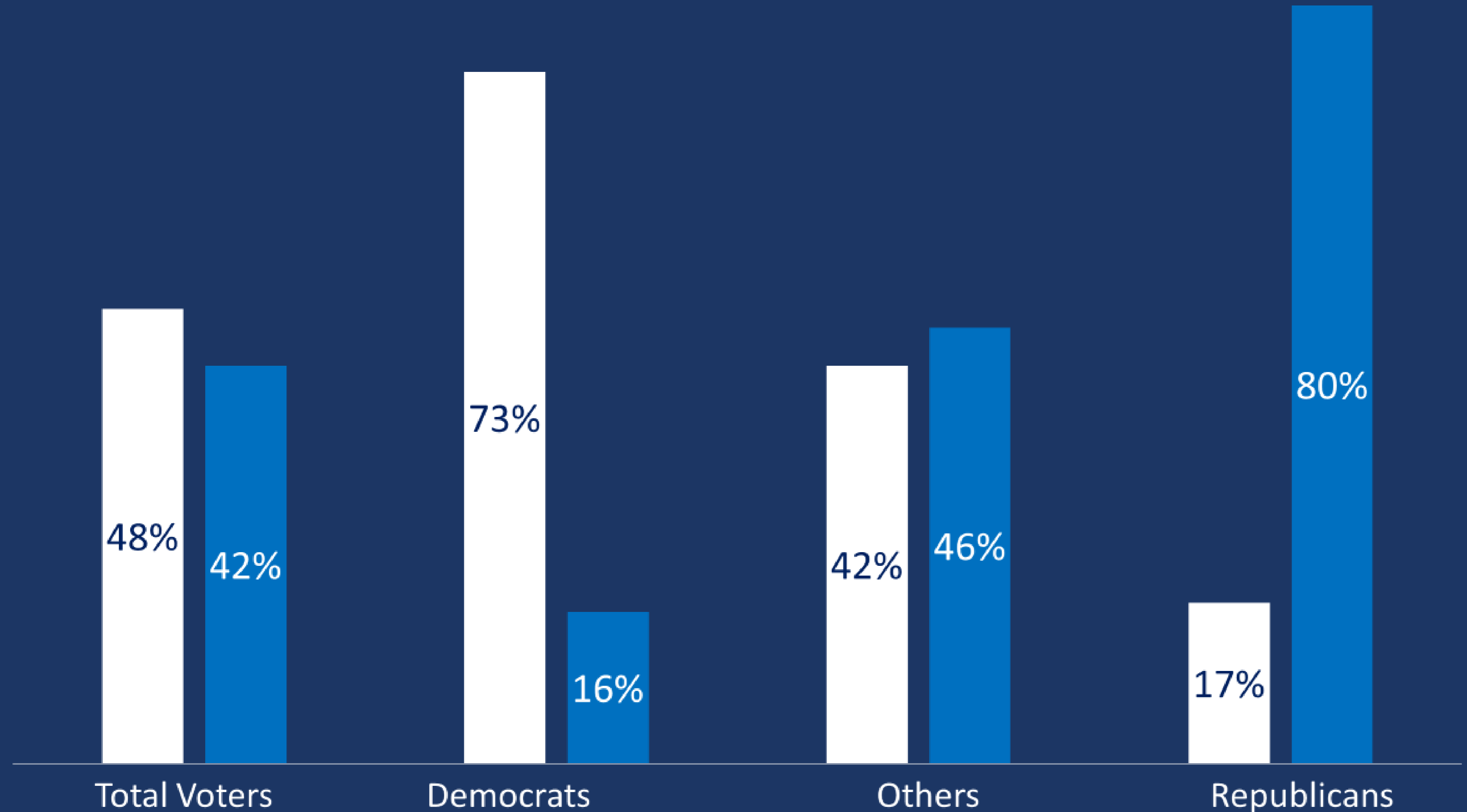


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What's Better? Socialism or Capitalism?

Voters Under 40



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



Florida's Game Changers/Headwinds



Term-limits creating Kings and Queens in Leadership – short term vs. long term.



Florida has become a **testing ground** for national issues and Constitutional Amendments as **turnout drivers** (The Alliance)



Out-of-state **billionaires** with their own anti-business agendas, essentially creating their own political machinery to advance their agendas.



State Republican and Democratic **parties** in states of **disarray**.



National Politics – Are President Trump and/or Congress a tailwind or headwind?



Proliferation of “**paid**” and “**fake**” news creating uncertainty.

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

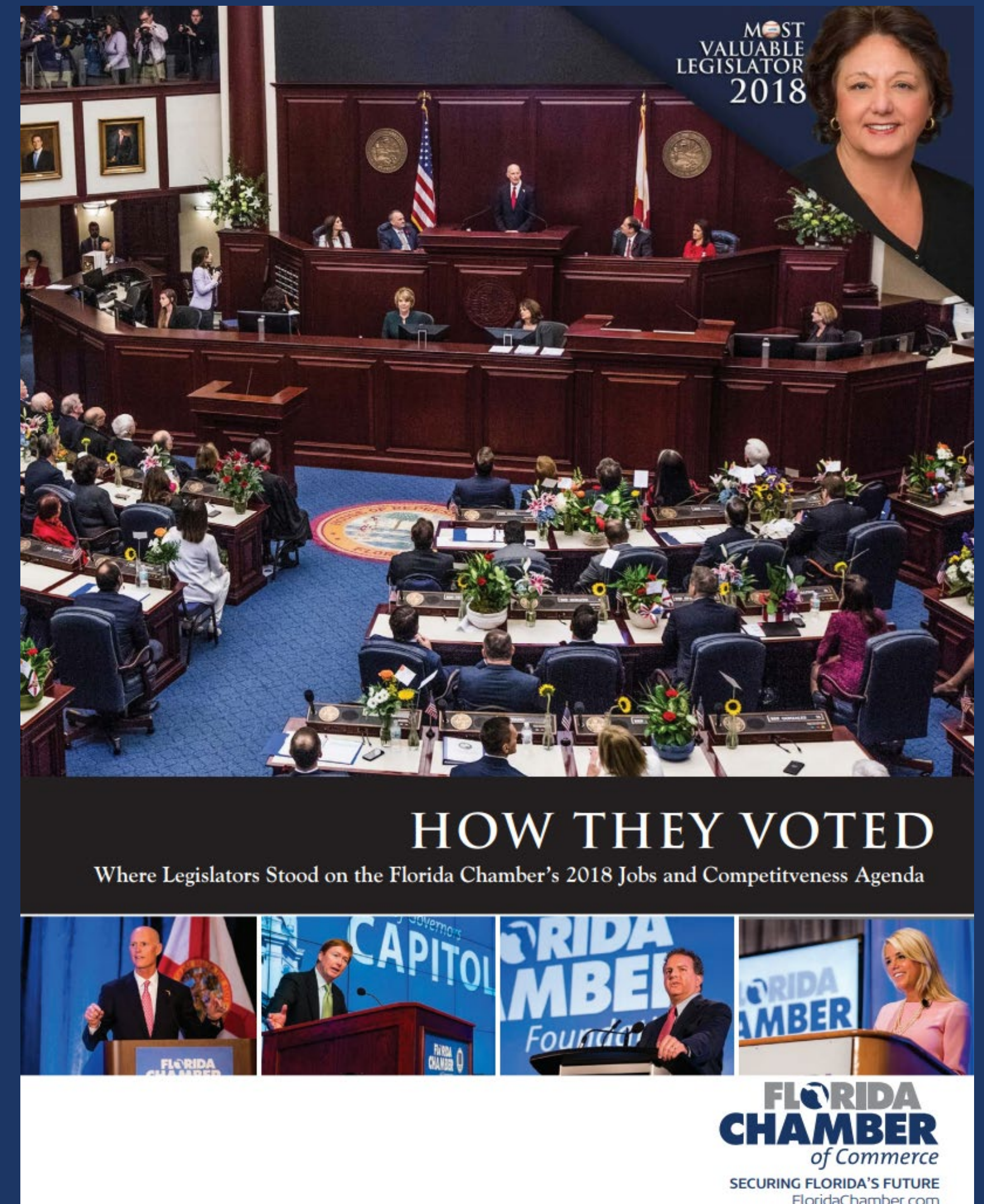
110 of 160 of the Legislature
have less than 2 years
experience



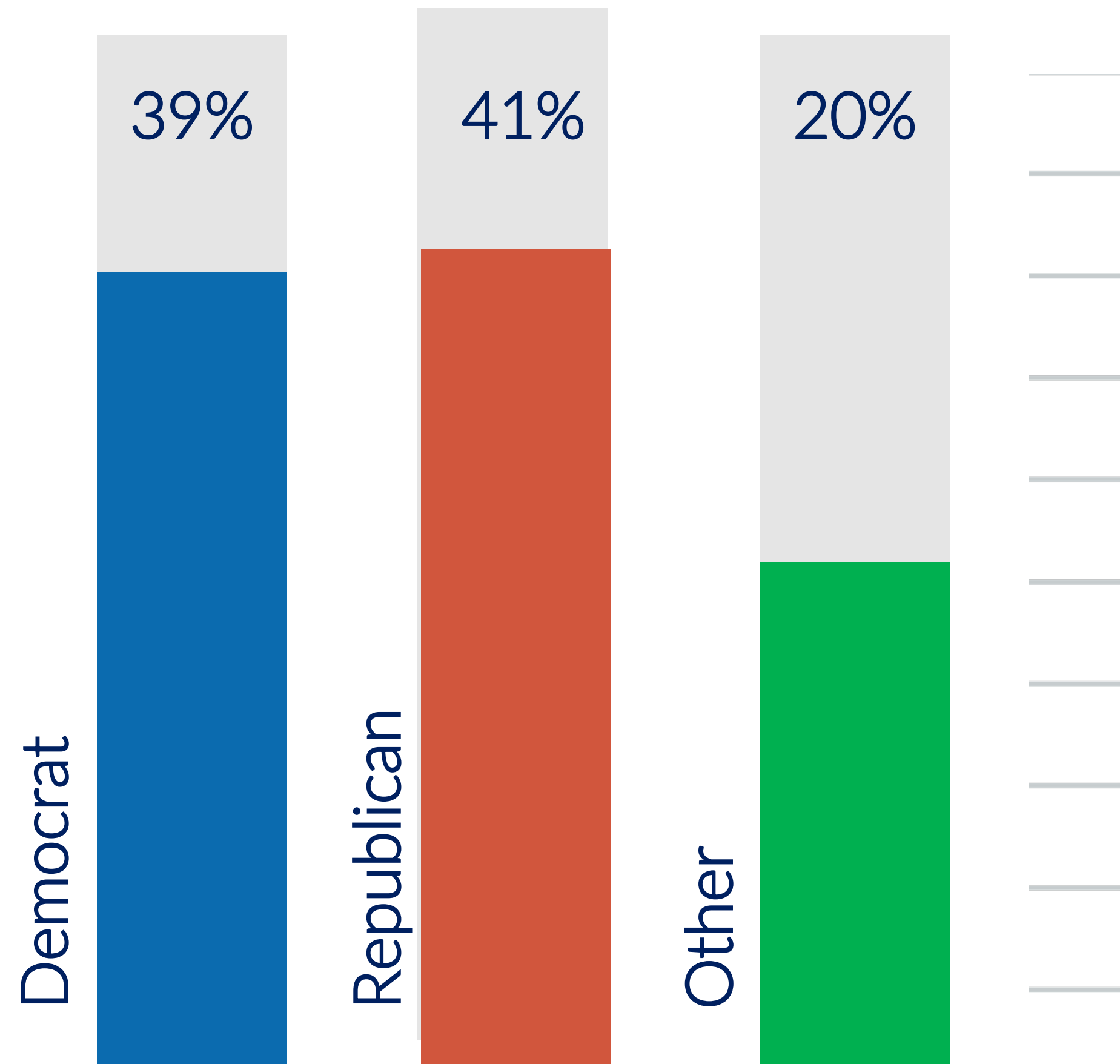
House Speaker José Oliva

2019 Legislative Recap

- The Florida Legislature (Mar. 5– May 4)
 - 160 Legislators
 - House- R: 71, D: 46 (3 Vacant)
 - Senate- R: 23, D: 17
- Bills Filed/Passed:
 - 2019: 3,491/174
 - The Florida Chamber testified 115 times
- 1,600+ lobbyists, Florida Chamber = 30+
- Themes:
 - New Governor, Cabinet, and Legislative Leaders
 - “Jobs and visitors will come anyway.”
 - Republicans negotiating against Republicans
 - Out-of-state-billionaires with agendas for Florida
 - Civility



2018 Voter Turnout By Party

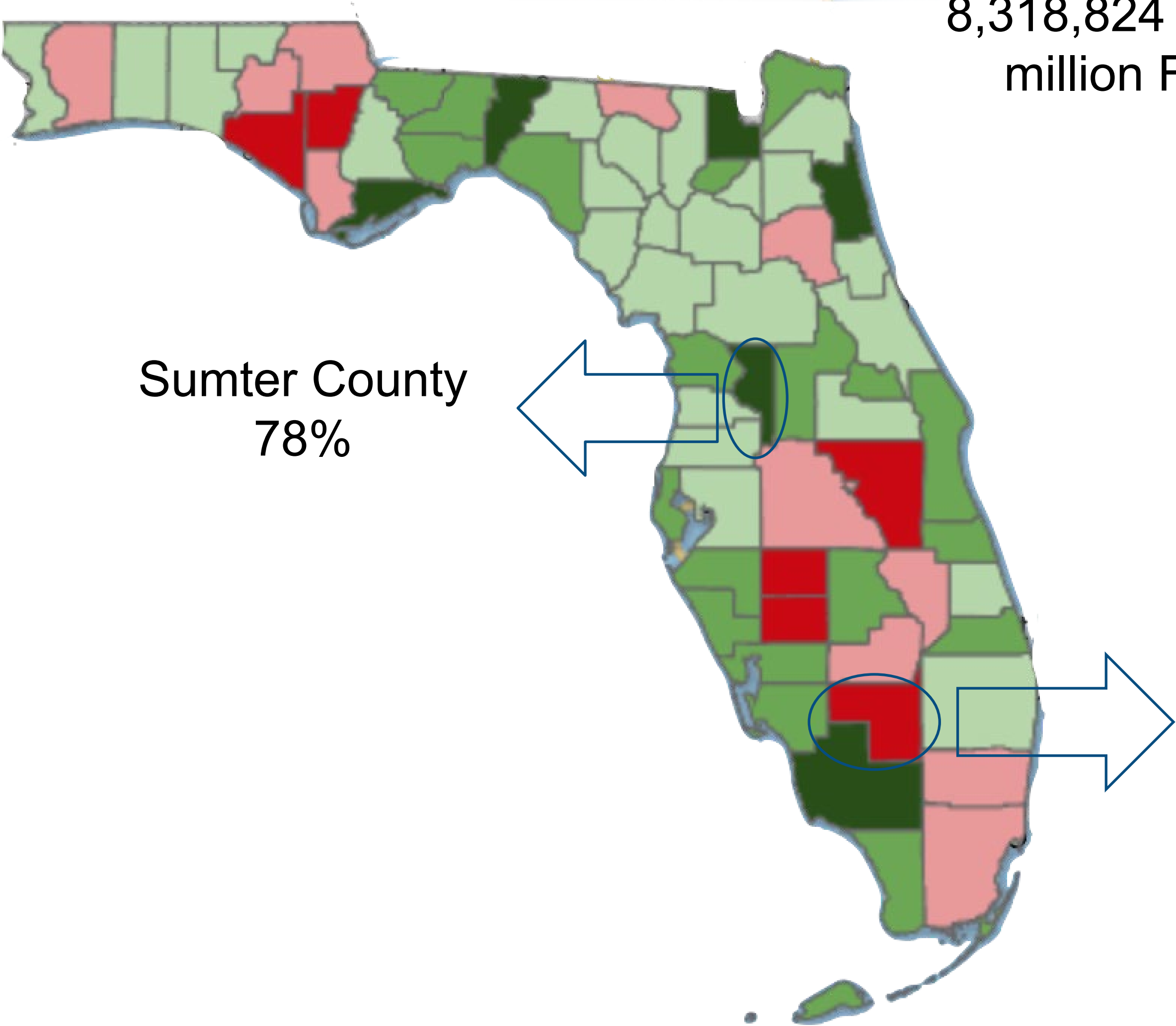
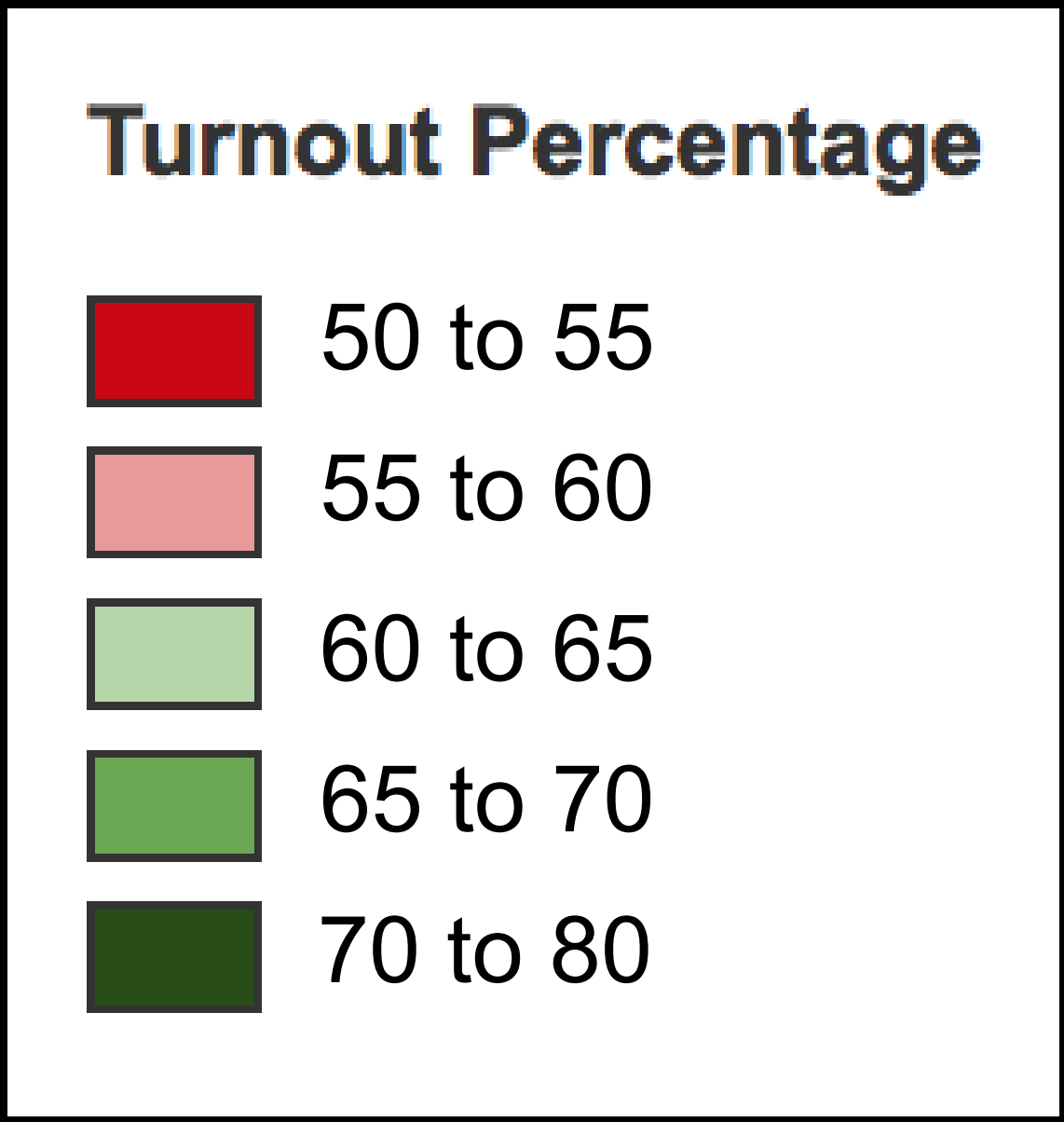


Why was most polling wrong in 2018?

- 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%

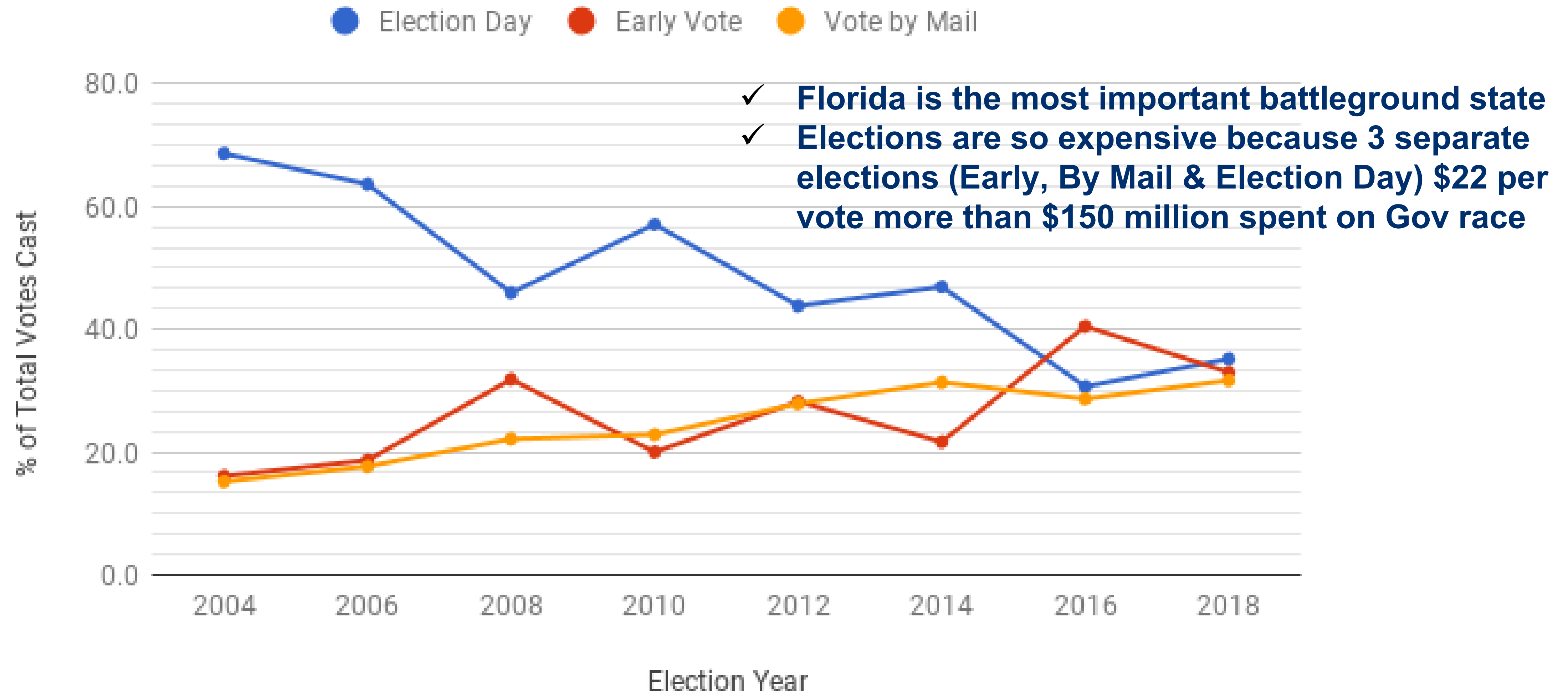


Sumter County
78%

Hendry County
50%

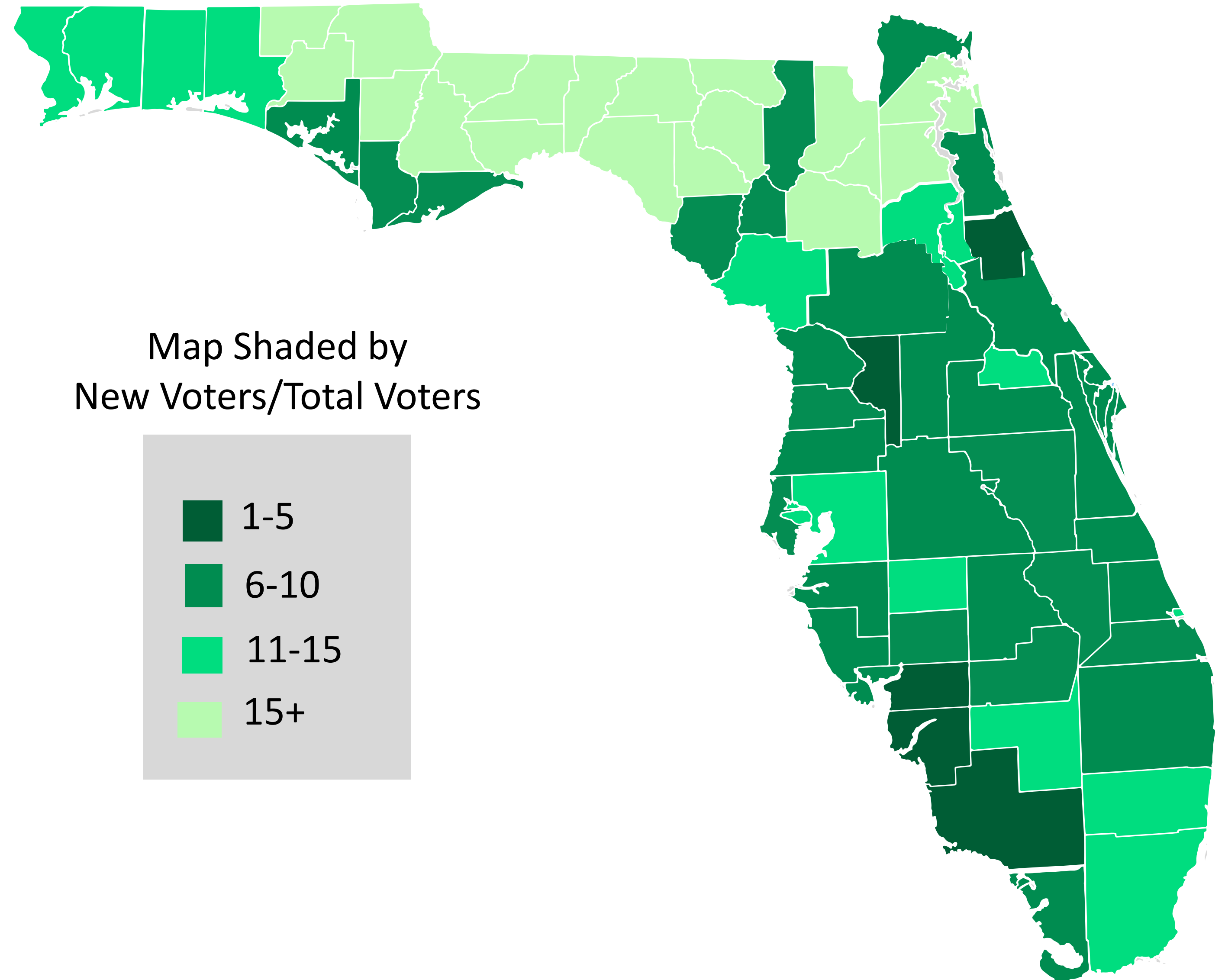
Florida's Electoral Changes and Forecast

Vote Share by Ballot Method



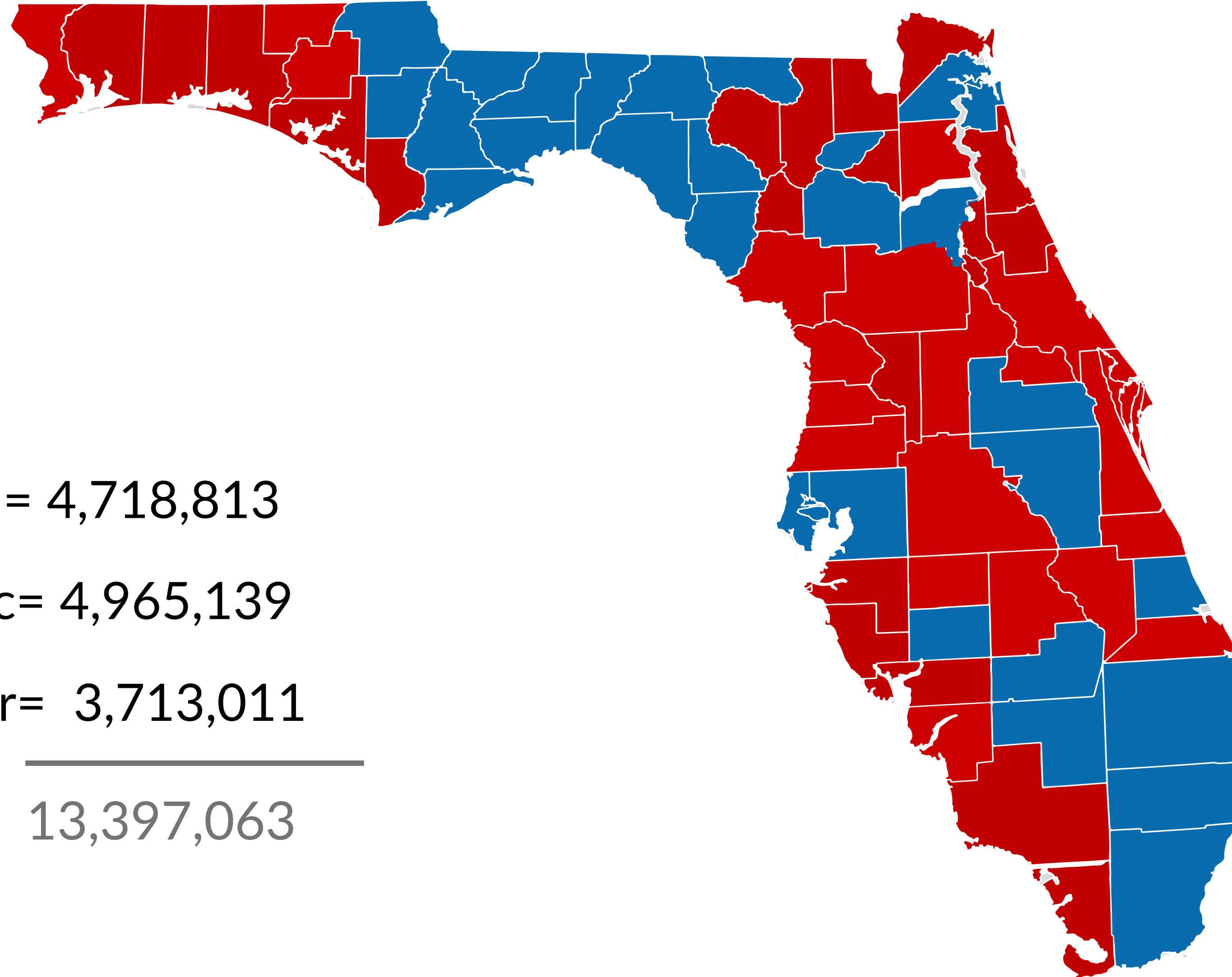
New Voters Since November 2010

Statewide	5,050,135
Men	2,298,264 (45%)
Women	2,475,195 (49%)
Republicans	1,436,752 (29%)
Democrats	1,671,599 (33%)
NPA/Others	1,941,784 (38%)
White	2,840,420 (56%)
Black	632,182 (13%)
Hispanics	1,057,053 (21%)
Other	520,480 (10%)



Total Voter Registration

By County (41R, 26D)



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

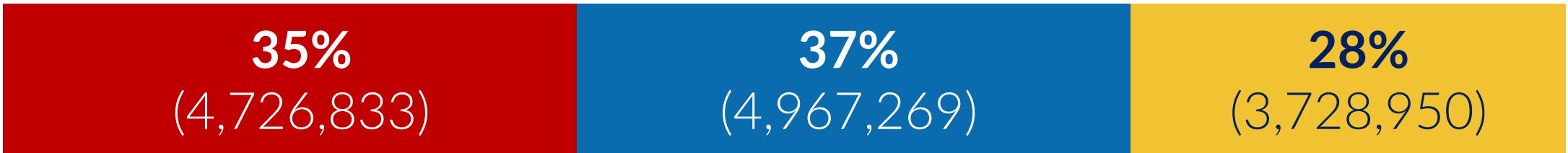
13,397,063

By County



Registration Comparisons Over Time

Total State: 13,423,052

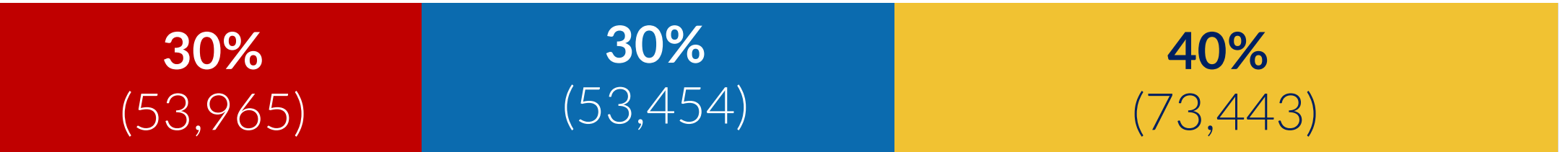


This Month: 42,067



- Republican
- Democratic
- NPA/Other

Year to Date: 180,862



Since Last Election: 258,774



Hillsborough County Registration Comparisons Over Time

Total State: 13,416,042



Total County: 866,257

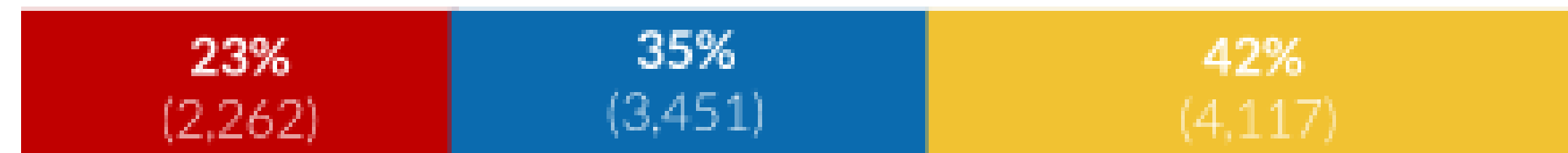


■ Republican
■ Democratic
■ NPA/Other

This Month: 2,871



Year to Date: 9,830

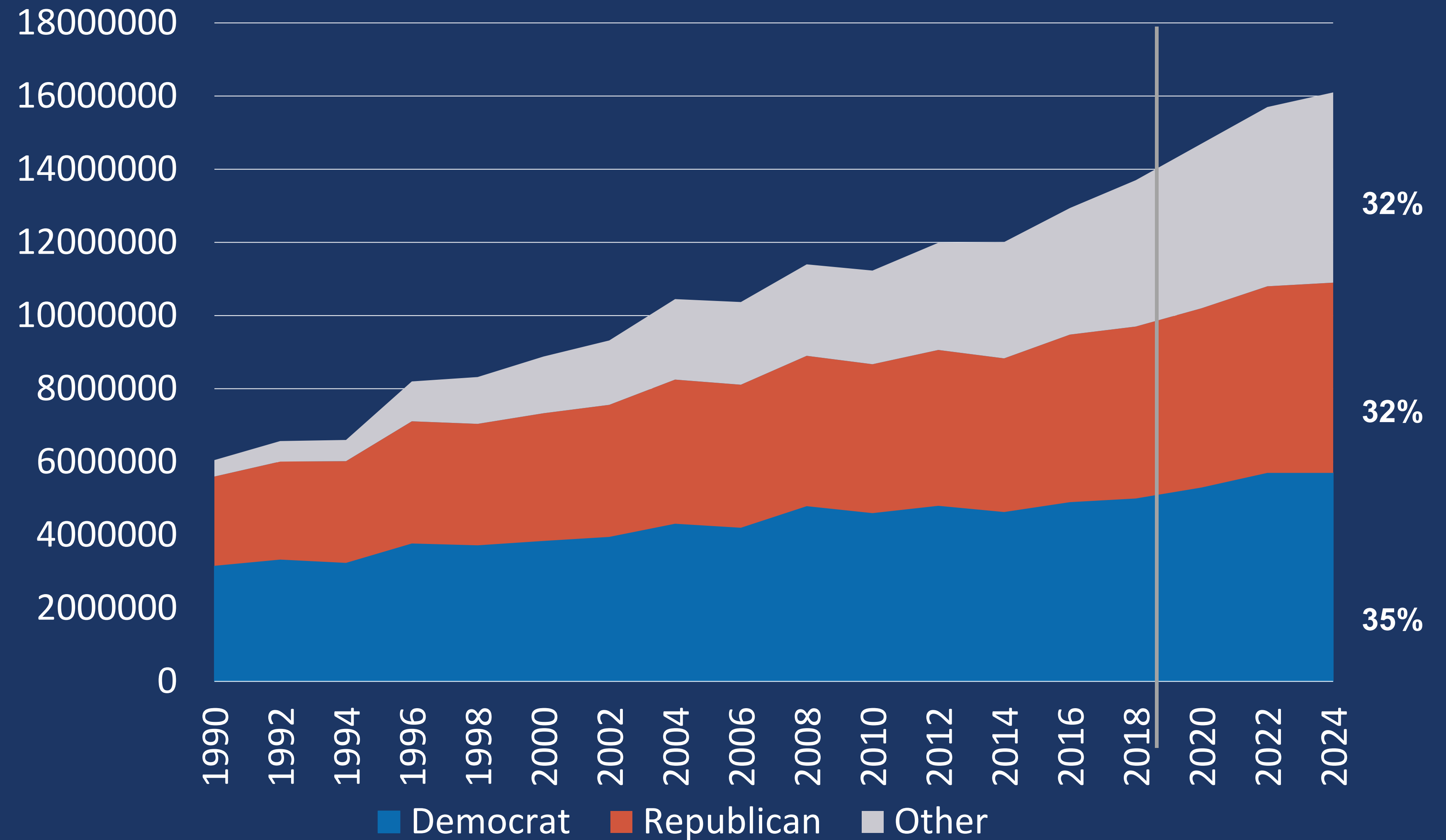


Since Last Election: 15,008



Voters Aren't Choosing Parties

Party
Registration
Projected
1990-2024





Florida Chamber's Latest Statewide Poll with 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

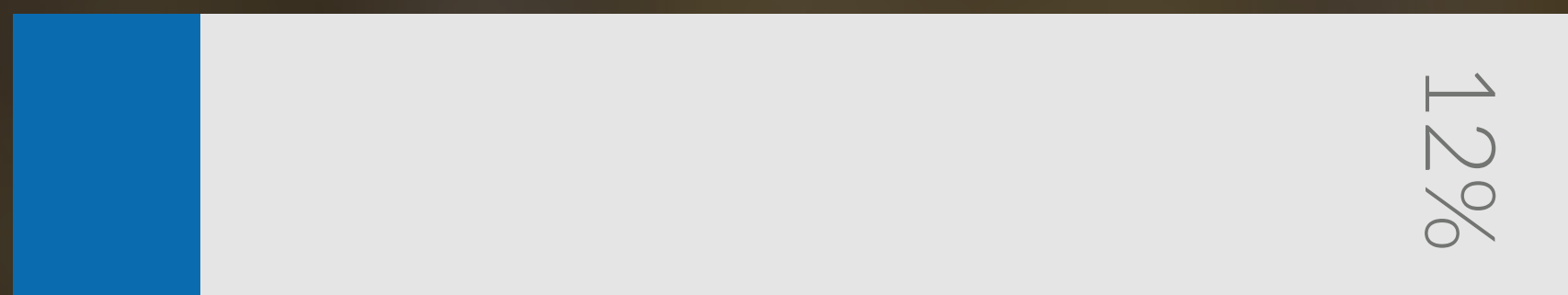
	EDUCATION	JOBS	ENVIRONMENT	OTHER
Statewide	13	11	11	Healthcare 10% Immigration 8% Gun Issues 5%
Men	9	12	13	Healthcare 8%
Women	17	11	9	Healthcare 11%
Rep	11	12	6	Immigration 13%
Dem	16	11	13	Healthcare 13%
Others	13	11	16	Healthcare 8%
White	12	10	15	Immigration 10%
Black	13	14	1	Healthcare 19%
Hispanic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

The Trump Conundrum

Favs REP



Favs DEM



Favs NPA



Getting Involved is Easy

#1

Join Us

- Florida International Trade and Investment Conference – 5.30.2019
- Learners to Earners Workforce Summit – 6.18.2019
- Future of Florida Forum – 10.28.2019

#2

Join a coalition/task force

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

#3

Call Mark

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