Uniting Florida's Businesses For Good

Why Making Florida More Competitive Matters

FLORIDA
CHAMBER
of Commerce

"Florida is changing. Our **ECONOMICS**, our demographics and our politics are all changing and these changes are both opportunities and challenges." – Mark Wilson
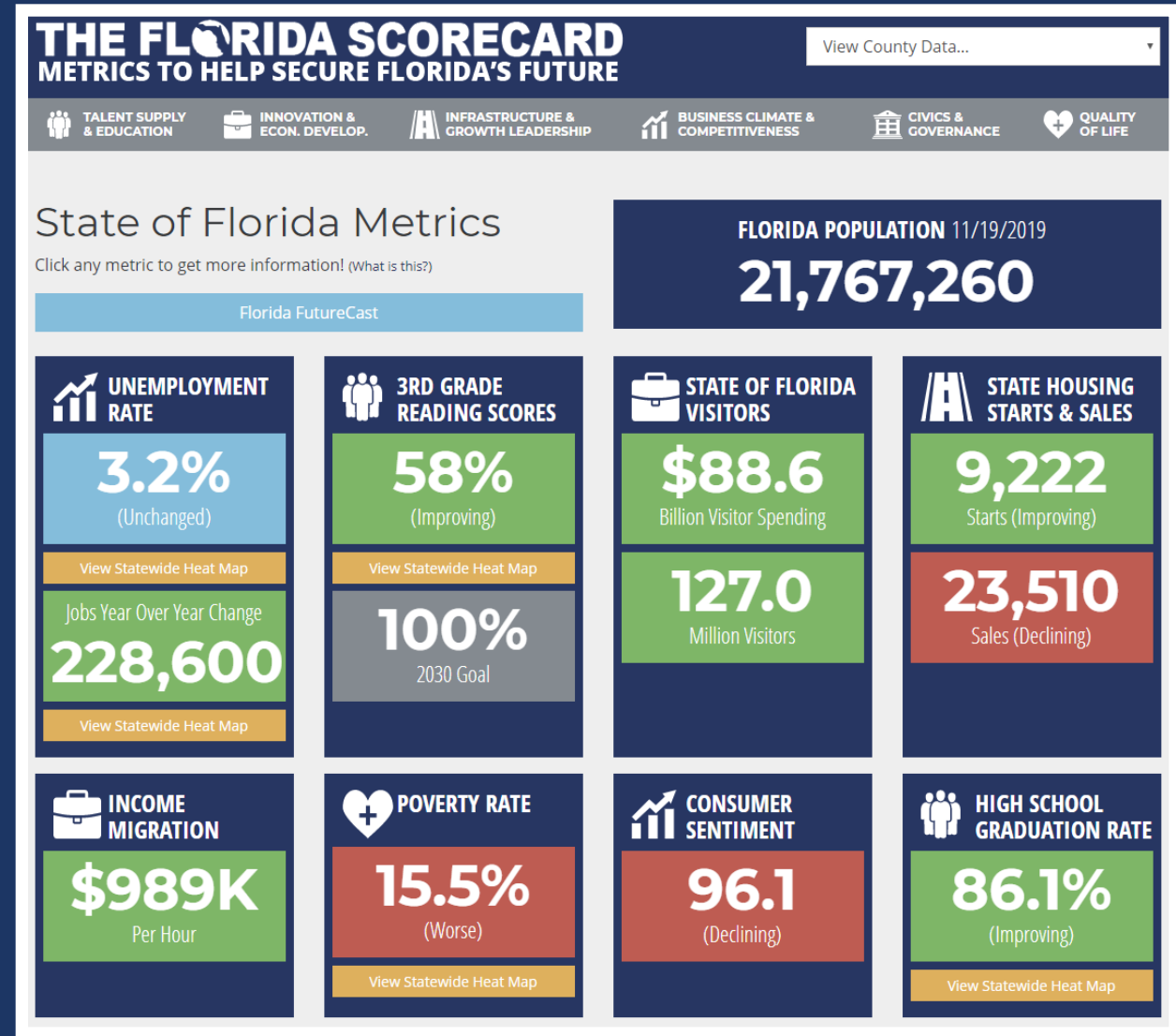
Download this presentation at
www.FloridaChamber.com/RegionalMeetingDaytona

Florida At A Glance

- Florida's Economy $1 Trillion GDP (17th)

- 21.7 Million Residents
  - 3rd / 26M By 2030 / More Than 900/Day

- 127 Million Visitors In 2018 (+50M by 2030)

- FL outpacing national average in creating jobs

- **FL's Talent Gap**: 280,000 Jobs Looking for People/331,000 People Looking for Jobs.

www.TheFloridaScorecard.org

THE FLORIDA SCORECARD
METRICS TO HELP SECURE FLORIDA'S FUTURE

View County Data...

TALENT SUPPLY & EDUCATION | INNOVATION & ECON. DEVELOP. | INFRASTRUCTURE & GROWTH LEADERSHIP | BUSINESS CLIMATE & COMPETITIVENESS | CIVICS & GOVERNANCE | QUALITY OF LIFE

State of Florida Metrics

Click any metric to get more information! (What is this?)

FLORIDA POPULATION 11/19/2019
21,767,260

Florida FutureCast

UNEMPLOYMENT RATE
3.2% (Unchanged)
View Statewide Heat Map
Jobs Year Over Year Change
228,600
View Statewide Heat Map

3RD GRADE READING SCORES
58% (Improving)
View Statewide Heat Map
100% 2030 Goal

STATE OF FLORIDA VISITORS
$88.6 Billion Visitor Spending
127.0 Million Visitors

STATE HOUSING STARTS & SALES
9,222 Starts (Improving)
23,510 Sales (Declining)

INCOME MIGRATION
$989K Per Hour

POVERTY RATE
15.5% (Worse)
View Statewide Heat Map

CONSUMER SENTIMENT
96.1 (Declining)

HIGH SCHOOL GRADUATION RATE
86.1% (Improving)
View Statewide Heat Map

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Job Creation by State: 2014-2018

Top States for Job Creation:
1. California 1,372,943
2. Florida 902,546
3. Texas 829,967
4. New York 532,572
5. Georgia 381,051
6. North Carolina 333,493
7. Washington 293,545
8. Arizona 283,305
9. Michigan 238,047
10. Pennsylvania 232,049

Top Job Growth Rates:
1. Utah 15.9%
2. Nevada 15.2%
3. Idaho 14.5%
4. Florida 13.4%
5. Oregon 13.3%
6. Arizona 13.2%
7. S. Carolina 12.0%
8. Washington 11.7%
9. Georgia 11.2%
10. Colorado 11.1%
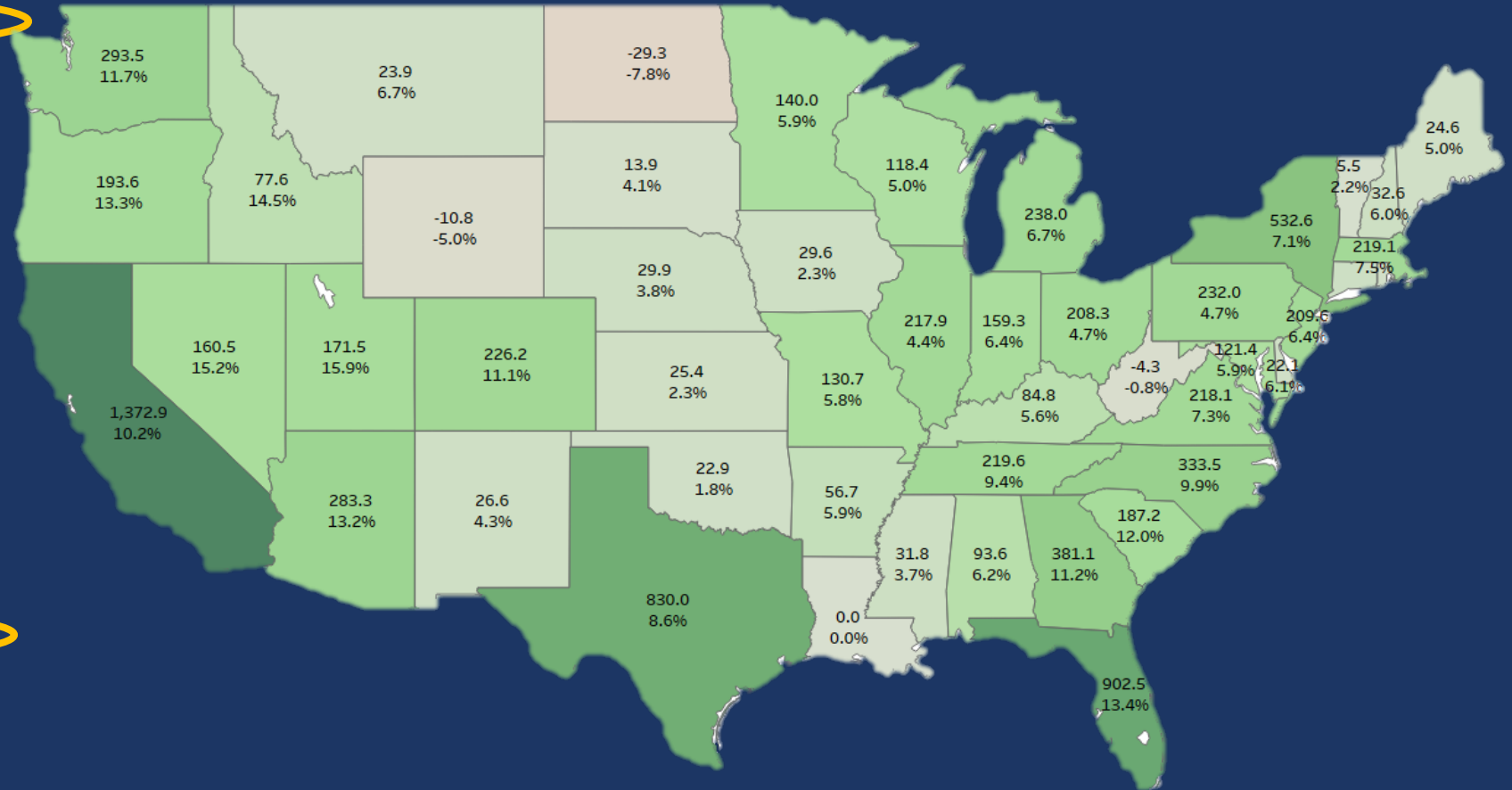
5 States had zero or negative job growth: Louisiana (0), West Virginia (-4,295), Alaska (-7,255), Wyoming (-10,847), North Dakota (-29,294)

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Industry	Jobs – September 2018 thru September 2019	Percent Growth
Education & Health Services	59,600	4.5%
Professional & Business Services	49,200	3.6%
Leisure & Hospitality	30,300	2.5%
Trade, Transportation & Utilities	20,400	1.1%
Financial Activities	19,100	3.3%
Construction	16,200	2.9%
Manufacturing	7,700	2.1%

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Job Creation
September 2018 – September 2019

U.S. Growth Rate 1.4%   Florida Growth Rate 2.5%

Top Job Growth Rates
1. Glades   6.5%
2. Miami-Dade   4.9%
3. Lee   4.2%
4. Union   4.1%
5. Osceola   3.9%
6. Orange   3.9%
7. Lake   3.9%
8. Seminole   3.8%
9. Okeechobee   3.8%
10. Okaloosa   3.7%

6 Counties Lost Jobs
1. Bay   -1,604
2. Highlands   -276
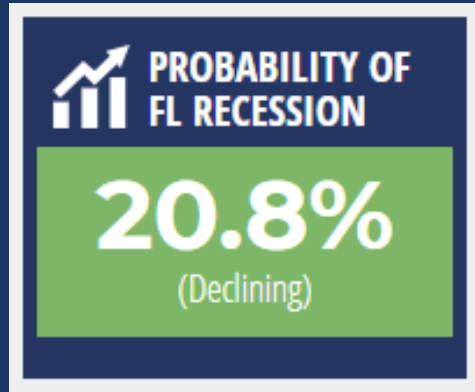3. Gulf   -114
4. Hardee   -76
5. Taylor   -12
6. Lafayette   -7

807 1.0%
3,445 3.7%
1,063 3.6%
88 1.3%
155 0.9%
1,861 1.3%
101 1.0%
-1,604 -1.8%
2 0.0%
627 3.5%
4,511 3.0%
161 2.9%
48 0.7%
40 1.0%
758 1.9%
-114 -1.9%
5 0.2%
496 3.4%
-12 -0.1%
222 1.2%
580 2.0%
231 2.0%
9,555 2.0%
119 2.5%
-7 -0.3%
188 4.1%
195 1.8%
2,062 2.0%
2,368 1.9%
47 0.7%
598 2.3%
52 0.9%
1,597 1.2%
1,226 2.7%
272 1.7%
4,069 3.1%
3,695 1.5%
573 1.2%
5,841 3.9%
9,465 3.8%
997 3.3%
1,436 2.1%
28,521 3.9%
4,771 2.1%
7,442 2.8%
10,564 2.2%
6,226 2.1%
6,853 3.9%
15,086 2.1%
2,157 3.5%
3,265 1.9%
-76 -1.0%
-276 -0.8%
644 3.8%
4,256 3.1%
3,319 1.8%
284 2.2%
2,267 3.2%
1,572 2.3%
316 6.5%
13,772 4.2%
327 2.3%
15,181 2.2%
5,480 3.3%
18,844 1.9%
1,350 3.1%
65,196 4.9%

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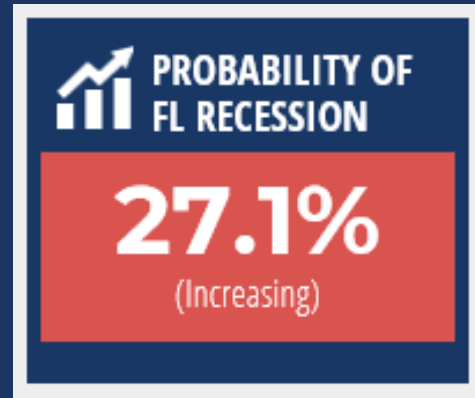# Industry Diversification by MSA

Diversification Rankings
#1   Naples-Immokalee-Marco Island MSA
#2   Palm Bay-Melbourne-Titusville MSA
#3   Miami-Ft. Lauderdale-West Palm Beach MSA
#4   Orlando-Kissimmee-Sanford MSA
#5   Cape Coral-Ft. Myers MSA
#6   Tampa-St. Petersburg-Clearwater MSA
#7   Jacksonville
#8   Lakeland-Winter Haven
#9   Panama City
#10   North Port-Sarasota-Bradenton

INDUSTRY DIVERSIFICATION

16th
(Improving)

Top 12
2030 Goal

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Probability of Florida's Recession

April 2019
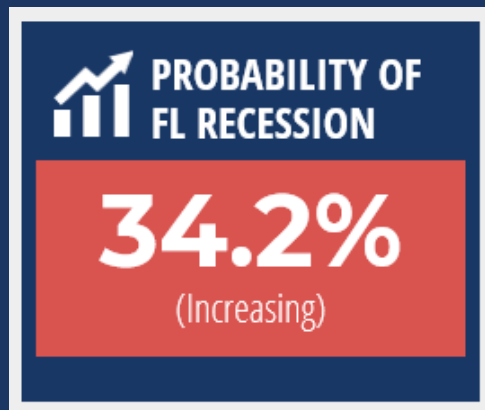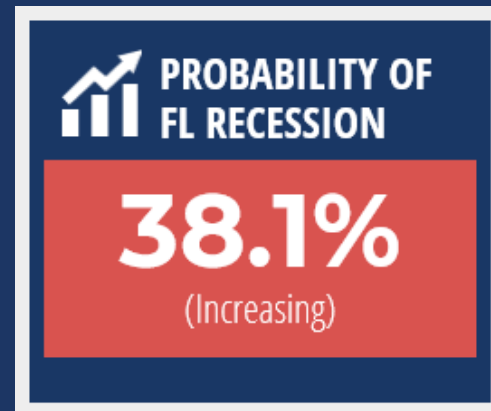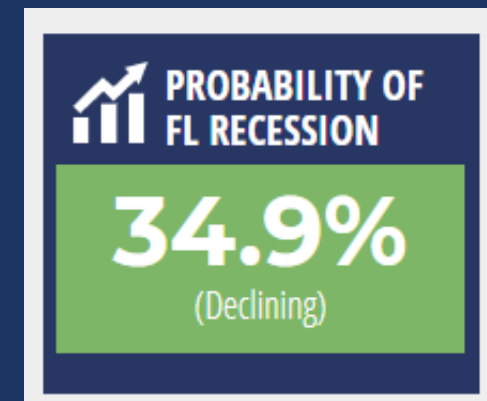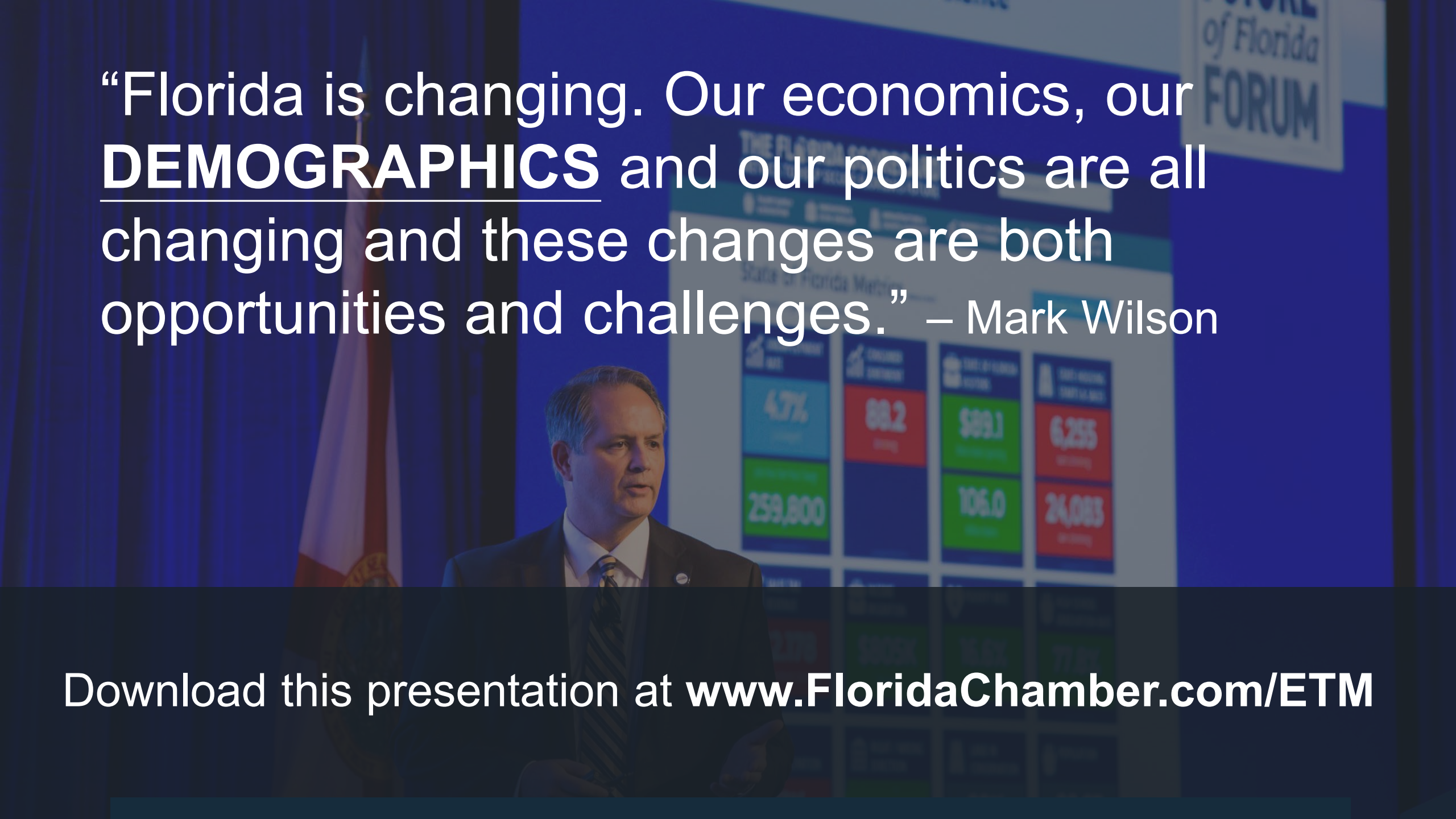
PROBABILITY OF FL RECESSION

20.8%
(Declining)

May 2019

PROBABILITY OF FL RECESSION

27.1%
(Increasing)

June 2019

PROBABILITY OF FL RECESSION

29.3%
(Increasing)

July 2019

PROBABILITY OF FL RECESSION

29.9%
(Increasing)

August 2019

PROBABILITY OF FL RECESSION

34.2%
(Increasing)

September 2019

PROBABILITY OF FL RECESSION

38.1%
(Increasing)

October 2019

PROBABILITY OF FL RECESSION

34.9%
(Declining)

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"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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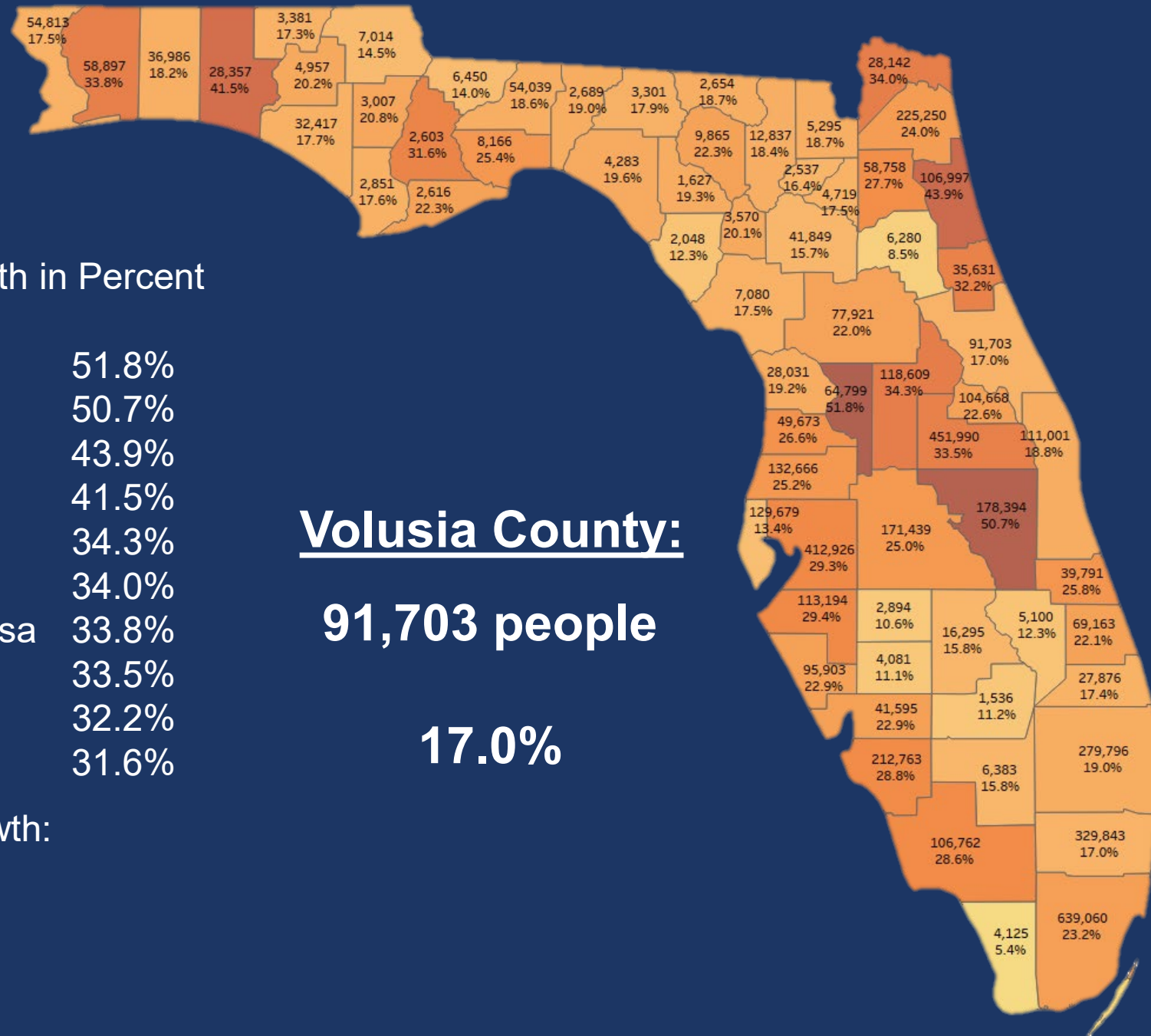# Florida's Next 4.5 Million People

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

The top 3 Counties get 33.4% of the Growth:
- Top 6:   52.0%
- Top 11: 70.3%
- Top 13: 75.5%

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%

Volusia County:

91,703 people

17.0%

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Map of Florida counties with growth figures and percentages:

- 54,813 — 17.5%
- 58,897 — 33.8%
- 36,986 — 18.2%
- 28,357 — 41.5%
- 3,381 — 17.3%
- 7,014 — 14.5%
- 4,957 — 20.2%
- 28,142 — 34.0%
- 3,007 — 20.8%
- 6,450 — 14.0%
- 54,039 — 18.6%
- 2,689 — 19.0%
- 3,301 — 17.9%
- 2,654 — 18.7%
- 225,250 — 24.0%
- 32,417 — 17.7%
- 2,603 — 31.6%
- 8,166 — 25.4%
- 4,283 — 19.6%
- 9,865 — 22.3%
- 12,837 — 18.4%
- 5,295 — 18.7%
- 58,758 — 27.7%
- 106,997 — 43.9%
- 2,851 — 17.6%
- 2,616 — 22.3%
- 1,627 — 19.3%
- 2,537 — 16.4%
- 4,719 — 17.5%
- 3,570 — 20.1%
- 6,280 — 8.5%
- 2,048 — 12.3%
- 41,849 — 15.7%
- 35,631 — 32.2%
- 7,080 — 17.5%
- 77,921 — 22.0%
- 91,703 — 17.0%
- 28,031 — 19.2%
- 64,799 — 51.8%
- 118,609 — 34.3%
- 104,668 — 22.6%
- 49,673 — 26.6%
- 111,001 — 18.8%
- 132,666 — 25.2%
- 129,679 — 13.4%
- 171,439 — 25.0%
- 178,394 — 50.7%
- 412,926 — 29.3%
- 39,791 — 25.8%
- 113,194 — 29.4%
- 2,894 — 10.6%
- 5,100 — 12.3%
- 69,163 — 22.1%
- 16,295 — 15.8%
- 27,876 — 17.4%
- 95,903 — 22.9%
- 4,081 — 11.1%
- 1,536 — 11.2%
- 41,595 — 22.9%
- 6,383 — 15.8%
- 279,796 — 19.0%
- 106,762 — 28.6%
- 212,763 — 28.8%
- 329,843 — 17.0%
- 4,125 — 5.4%
- 639,060 — 23.2%

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%

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Growth to 2030 by Age Group

Age Group

Increase in Age 65+ by 2030: **2,265,615**

Under 50: **2,339,370**

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%

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Florida's Next 4.5 Million People

- Florida adds **900 new residents** per day
  - 810 come from other states and countries

- Florida gains **$989,000** in wealth every hour

FLORIDA CHAMBER of Commerce
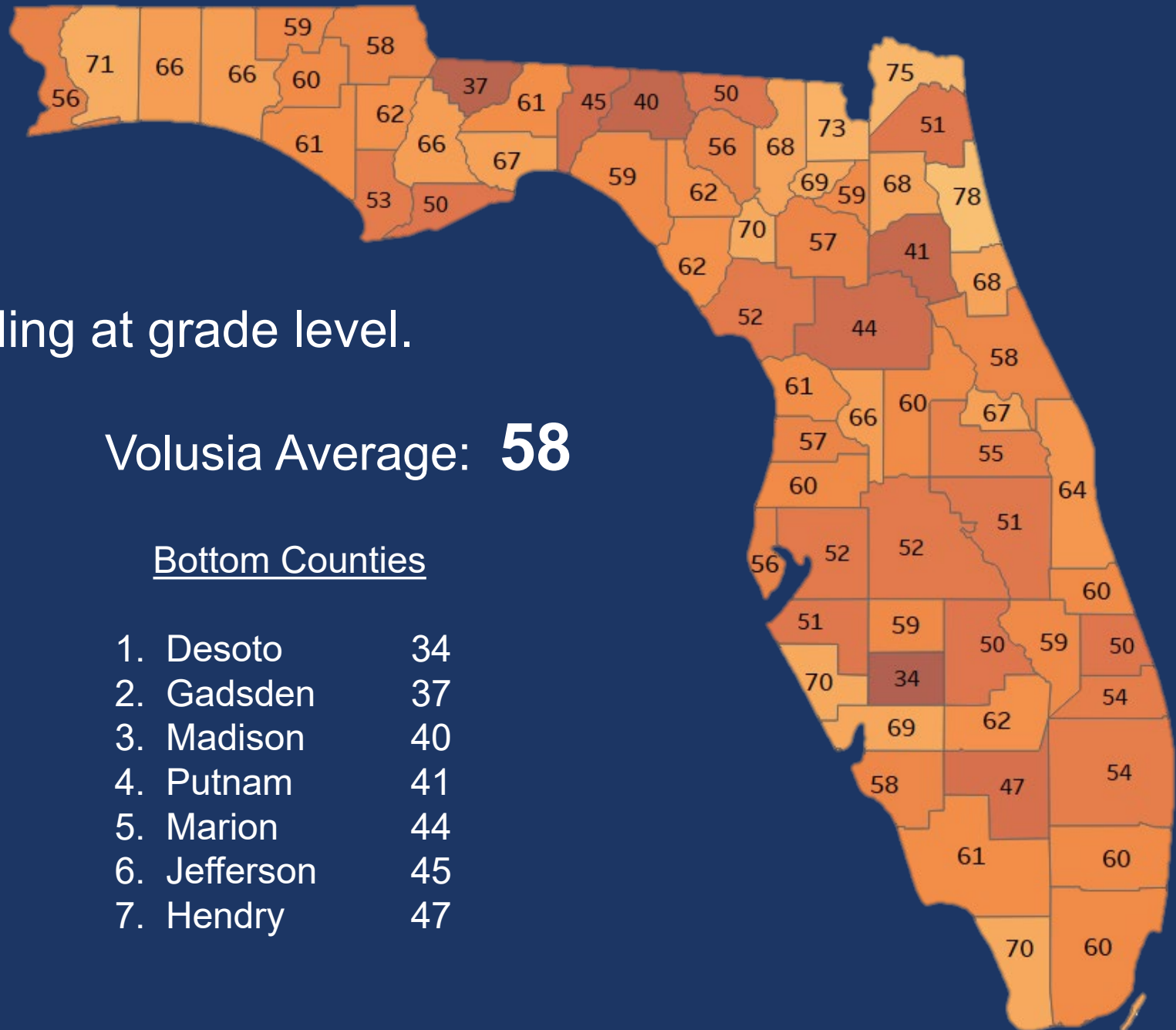
Percent of Volusia County 3rd Graders Not Reading at Grade Level

School	Score
BLUE LAKE	43
BURNS SCIENCE & TECH	78
CHAMPION	51
CHISHOLM	55
CITRUS GROVE	61
CORONADO BEACH	82
CYPRESS CREEK	75
DEBARY	66
DELTONA LAKES	57
DISCOVERY	42
EDGEWATER PUBLIC	45
EDITH I. STARKE	39
ENTERPRISE	52
FOREST LAKE	49
FREEDOM	70
FRIENDSHIP	44
GEORGE W. MARKS	67

School	Score
HOLLY HILL	29
HORIZON	73
INDIAN RIVER	69
IVY HAWN	75
LOUISE S. MCINNIS	33
MANATEE COVE	63
ORANGE CITY	47
ORMOND BEACH	79
ORTONA	46
OSCEOLA	48
OSTEEN	75
PALM TERRACE	33
PATHWAYS	70
PIERSON	50
PINE TRAIL	73
PORT ORANGE	77
PRIDE	51

School	Score
R. J. LONGSTREET	61
READ-PATTILLO	64
SAMSULA ACADEMY	61
SOUTH DAYTONA	53
SPIRIT	48
SPRUCE CREEK	67
SUGAR MILL	64
SUNRISE	59
SWEETWATER	76
THE READING EDGE	57
TIMBERCREST	65
TOMOKA	62
TURIE T. SMALL	43
VOLUSIA PINES	56
WESTSIDE	36
WOODWARD AVENUE	54

Florida

3RD GRADE READING SCORES
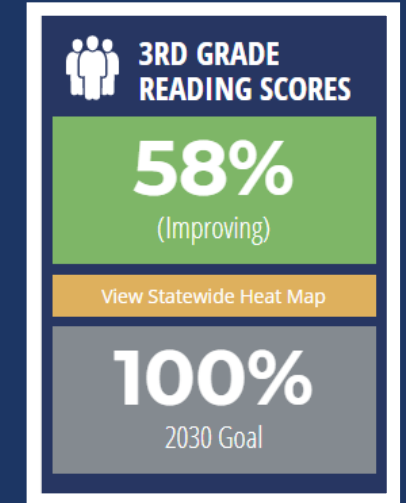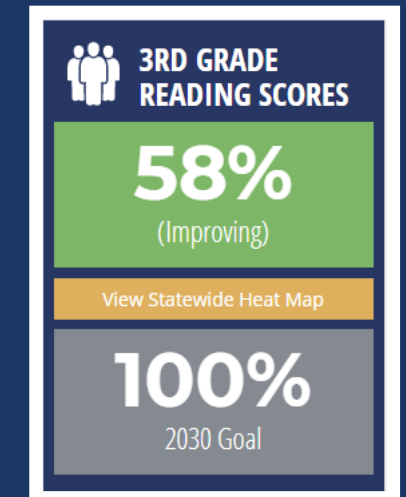
58% (Improving)

View Statewide Heat Map

100% 2030 Goal

Volusia

3RD GRADE READING SCORES

58% (Improving)

View Statewide Heat Map

100% 2030 Goal

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Highest: **Coronado Beach – 82%**   Lowest: **Holly Hill – 29%**
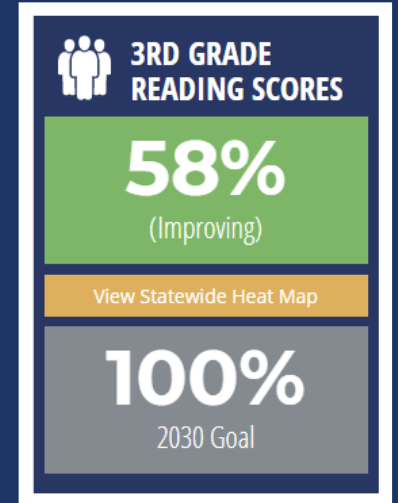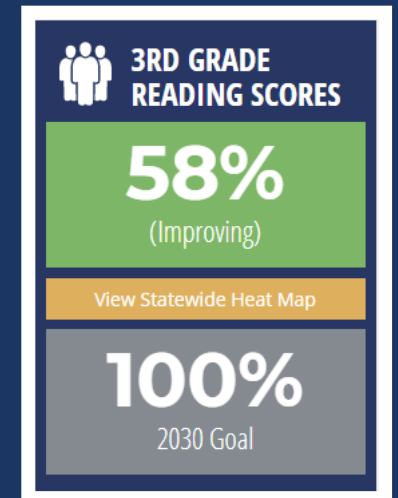
Number of Volusia County 3ʳᵈ Graders Not Reading at Grade Level

School	Score	Kids Not Reading
BLUE LAKE	43	50
BURNS SCIENCE & TECH	78	11
CHAMPION	51	51
CHISHOLM	55	35
CITRUS GROVE	61	66
CORONADO BEACH	82	6
CYPRESS CREEK	75	34
DEBARY	66	43
DELTONA LAKES	57	59
DISCOVERY	42	57
EDGEWATER PUBLIC	45	43
EDITH I. STARKE	39	37
ENTERPRISE	52	42
FOREST LAKE	49	47
FREEDOM	70	39
FRIENDSHIP	44	45
GEORGE W. MARKS	67	33

School	Score	Kids Not Reading
HOLLY HILL	29	66
HORIZON	73	35
INDIAN RIVER	69	36
IVY HAWN	75	18
LOUISE S. MCINNIS	33	43
MANATEE COVE	63	47
ORANGE CITY	47	41
ORMOND BEACH	79	10
ORTONA	46	20
OSCEOLA	48	38
OSTEEN	75	19
PALM TERRACE	33	80
PATHWAYS	70	40
PIERSON	50	45
PINE TRAIL	73	32
PORT ORANGE	77	20
PRIDE	51	46

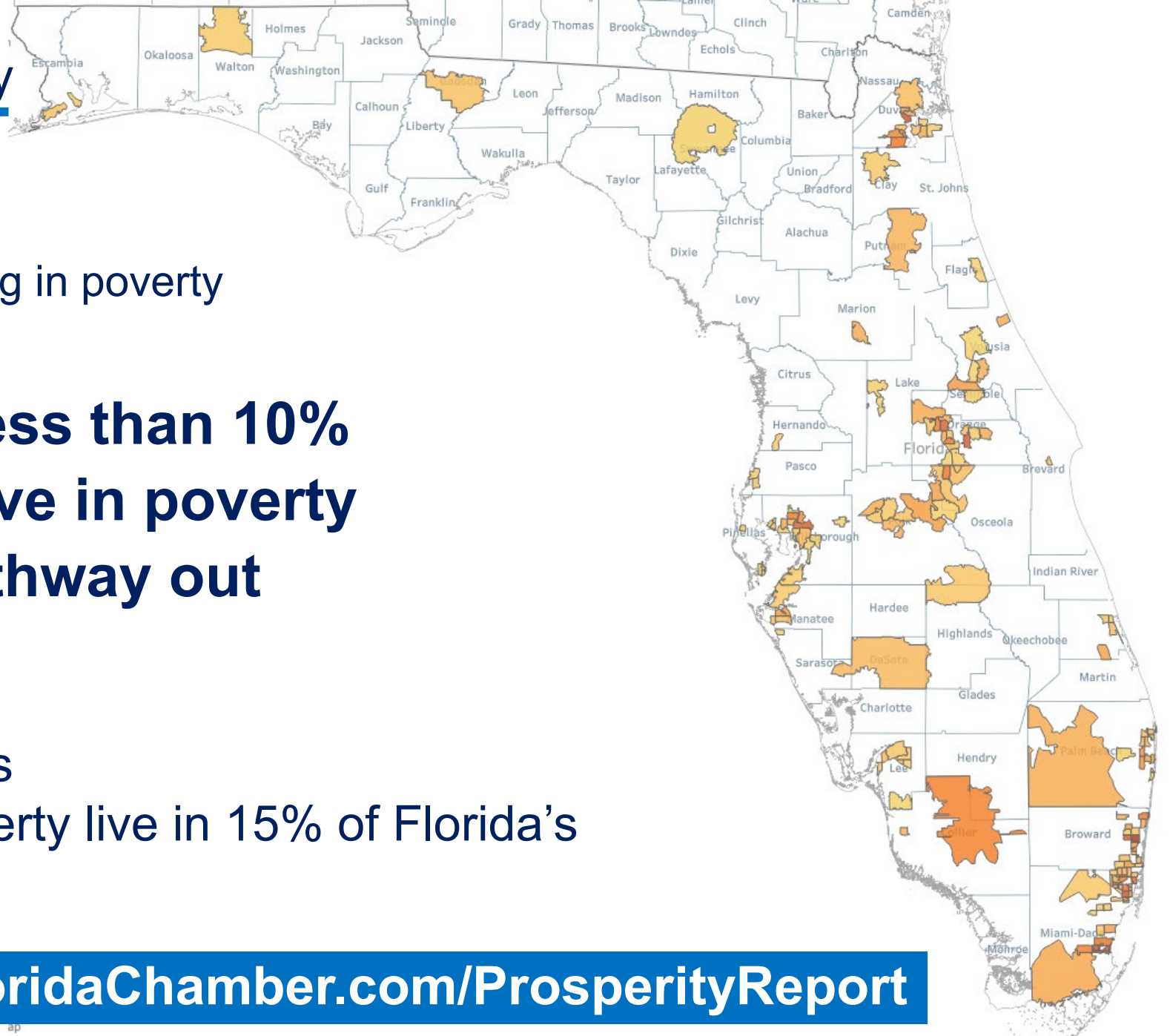| School	Score	Kids Not Reading
R. J. LONGSTREET	61	28
READ-PATTILLO	64	25
SAMSULA ACADEMY	61	14
SOUTH DAYTONA	53	53
SPIRIT	48	66
SPRUCE CREEK	67	43
SUGAR MILL	64	36
SUNRISE	59	41
SWEETWATER	76	26
THE READING EDGE	57	26
TIMBERCREST	65	46
TOMOKA	62	47
TURIE T. SMALL	43	50
VOLUSIA PINES	56	41
WESTSIDE	36	66
WOODWARD AVENUE	54	54

Florida

3RD GRADE READING SCORES

58% (Improving)

View Statewide Heat Map

100% 2030 Goal

Volusia

3RD GRADE READING SCORES

58% (Improving)

View Statewide Heat Map

100% 2030 Goal

Lowest: **Coronado Beach – 6**   Highest: **Palm Terrace - 80**

Ending Generational Poverty

901,772 kids under-18 living in poverty

Florida 2030 Goal: **Less than 10% of Florida children live in poverty and 100% have a pathway out**

- Florida has 943 zip codes
- Half of all children in poverty live in 15% of Florida's zip codes (148)

www.FloridaChamber.com/ProsperityReport
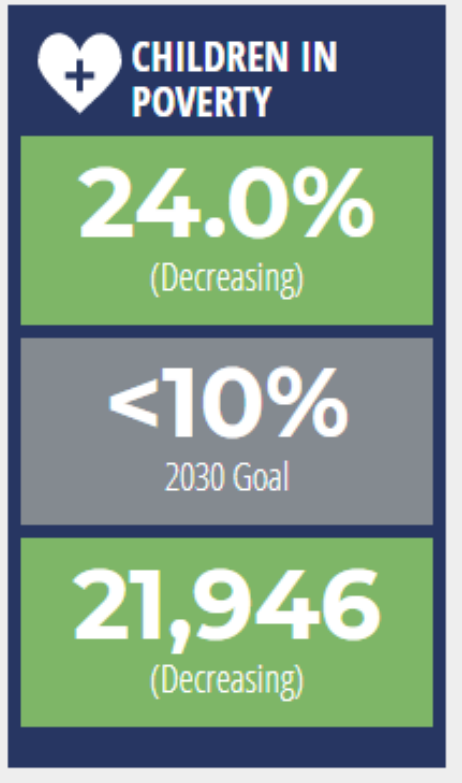
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Volusia County

Kids Living in Poverty

32117

1,850 kids

41.4%

Volusia County

CHILDREN IN POVERTY

24.0%
(Decreasing)

<10%
2030 Goal

21,946
(Decreasing)

Map labels:
- 32190 / 161 / 60.5%
- 32136 / 66 / 7.3%
- 32174 / 901 / 12.3%
- 32176 / 244 / 15.0%
- 32117 / 1,850 / 41.4%
- 32118 / 274 / 17.4%
- 32180 / 438 / 39.8%
- 32124 / 179 / 22.2%
- 32114 / 3,132 / 59.3%
- 32119 / 874 / 24.0%
- 32130 / 659 / 51.5%
- 32129 / 444 / 13.6%
- 32127 / 1,052 / 22.3%
- 32128 / 804 / 21.6%
- 32720 / 1,437 / 22.6%
- 32724 / 1,897 / 29.6%
- 32168 / 552 / 13.2%
- 32169 / 0 / 0.0%
- 32744 / 92 / 15.4%
- 32132 / 102 / 9.4%
- 32141 / 599 / 20.1%
- 32763 / 931 / 20.6%
- 32738 / 3,004 / 26.7%
- 32713 / 353 / 9.9%
- 32725 / 1,931 / 18.9%
- 32764 / 56 / 13.6%
- 32759 / 153 / 38.1%
- 32754 / 447 / 26.2%

Numbers:
Top - Zip Code
Middle – Kids Living in Poverty
Bottom – Percent of kids living in Poverty
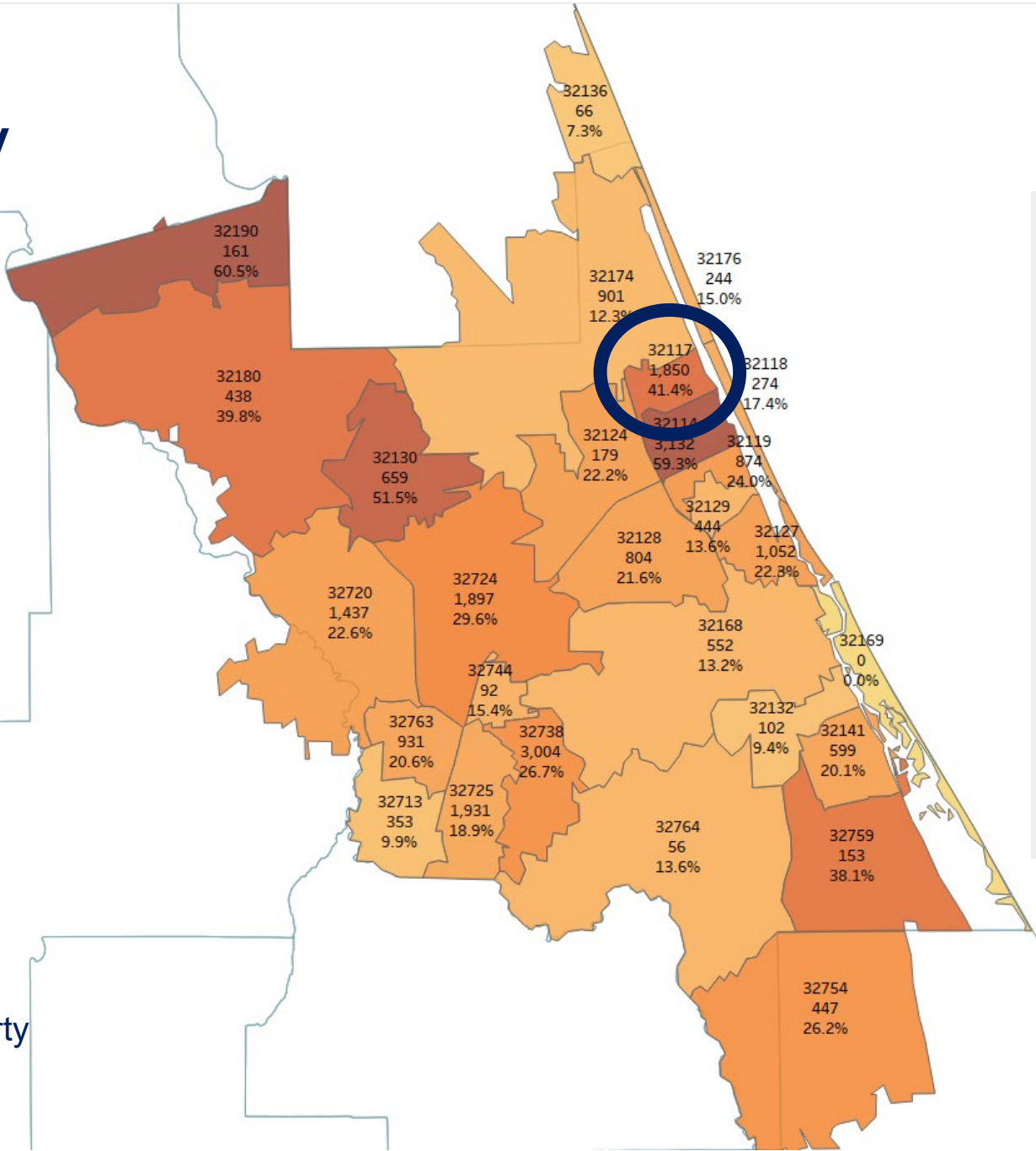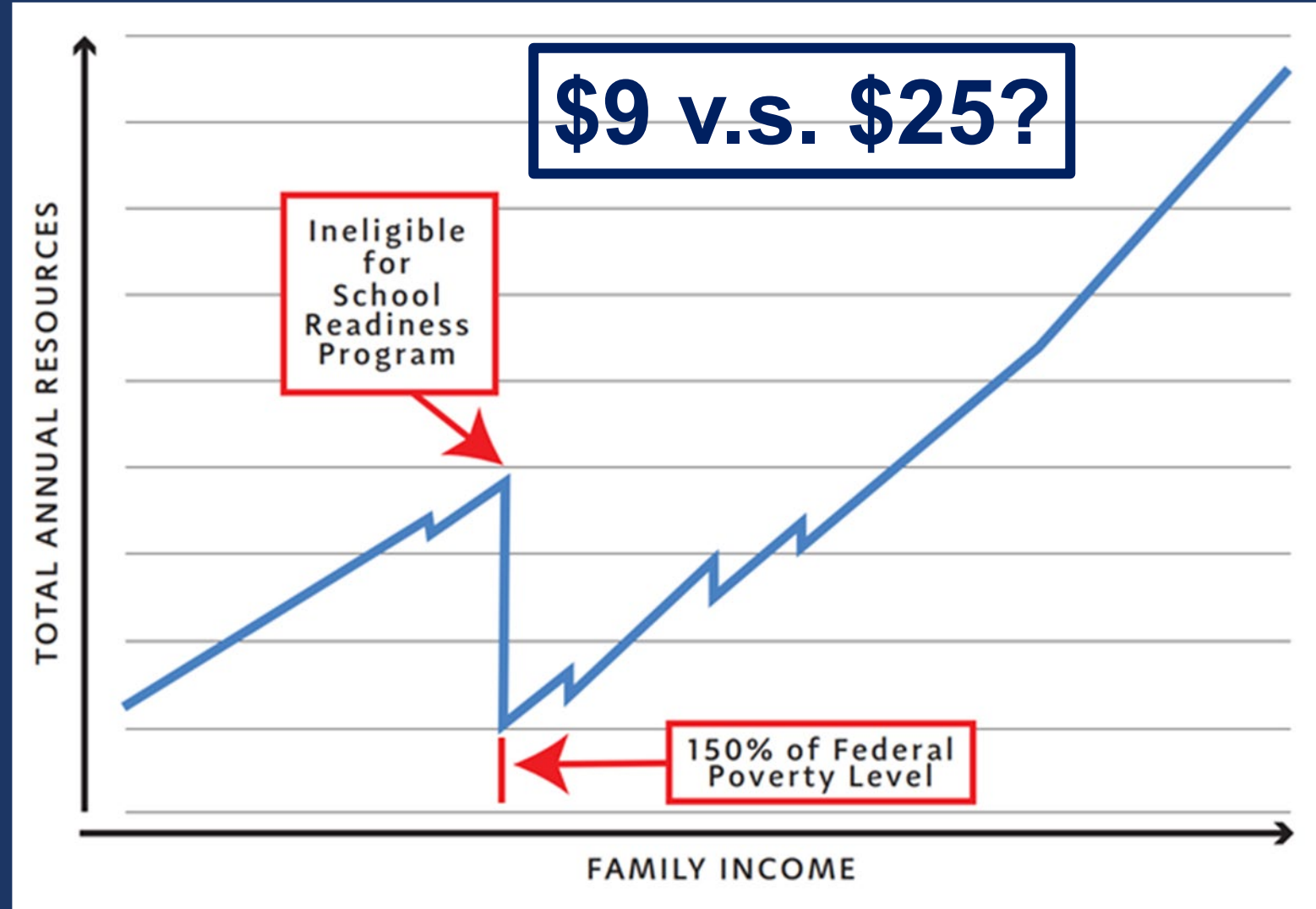
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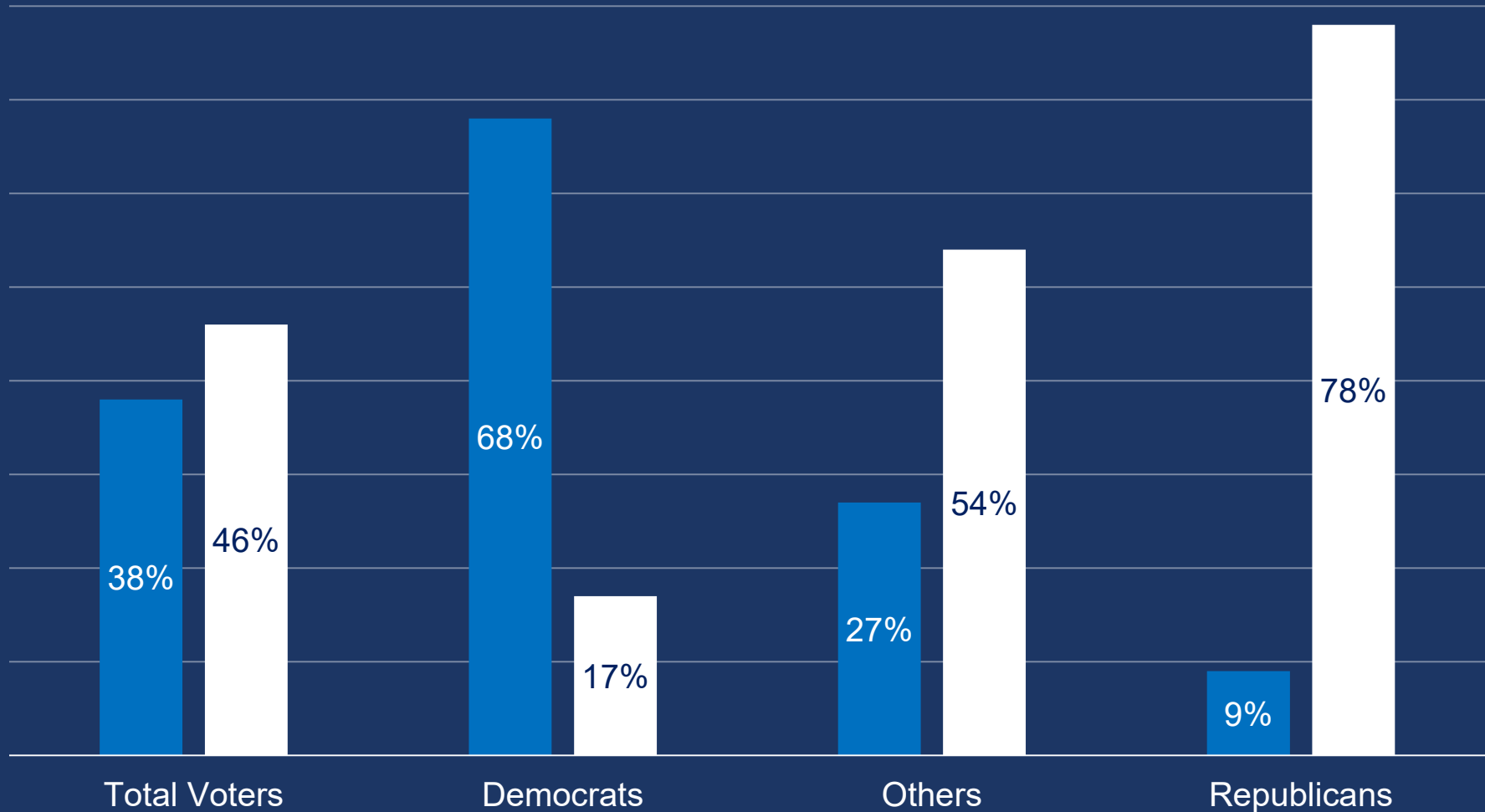
Florida's Governor, Cabinet and Legislative Leaders

2020 Legislative Outlook

- The Florida Legislature - 160 Legislators
  - House- R: 73, D: 47,
  - Senate- R: 23, D: 17

- 2020 Session: January 14 – March 13

- Bills Filed/Passed:
  - 2020: 811/TBD
  - 2019: 3361/195

- 1,100+ lobbyists, Florida Chamber = 30+

2020 Legislative Outlook – On Offense

Overdue Lawsuit Abuse Reform
- Auto Glass AOB, Accuracy in Damages, Workers' Compensation, Bad Faith Reform, and more

Targeted Tax Reform
- Business Rent Tax, Research & Development, E-Fairness

Science-Based Infrastructure and Environmental Policy
- Rural Connectivity, Septic-to-Sewer Conversions, Autonomous Infrastructure, Innovation, Corridors

Workforce Readiness and Expanded School Choice Initiatives
- K-12, Higher Education, Vocational/Technical Training, Alignment

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2020 Legislative Outlook – On Defense

Employer Mandates & Business Regulations
- Wage Mandates, Regulated Scheduling, E-Verify Mandates, Bag/Straw/Sunscreen Bans, etc.

Economic Development and Tourism Marketing Funding
- Many lawmakers want to eliminate these programs

Anti-Jobs Constitutional Amendments by Out-of-State Billionaires
- Using the constitutional amendment process to get around the Florida Legislature.

Apathy/Politics of a Divided Business Community
- Business community is stronger when united on issues (AKA, stop supporting the enemy).

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Constitutional Amendments on the Horizon

Title	Sponsor	Number of Signatures
Citizenship Requirement to Vote	Florida Citizen Voters	928,139
Raising Florida's Minimum Wage	Florida for a Fair Wage	769,307
All Voters Vote in Primary Elections for State Legislature, Governor and Cabinet	All Voters Vote, Inc.	761,884
Allowing Energy Choice	Citizens for Energy Choices	543,308
Ban Assault Weapons	Ban Assault Weapons Now	120,324
Regulate Marijuana Like Alcohol	Sensible Florida, Inc.	92,371
Provide Medicaid Coverage to Low-Income Adults	Florida Decides Healthcare, Inc.	90,390

Green indicates a proposal already assigned a ballot number

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Others filed:

- Adult Use of Marijuana

- Vote by Internet

- All tolls shall be approved by voters

- All traffic citations must be issued without use of red light cameras or speed cameras

- $50 Per Hour (wage mandate)

- All traffic citations must be issued without use of red light cameras or speed cameras

TOTAL VOTER REGISTRATION
By County (39R, 28D)
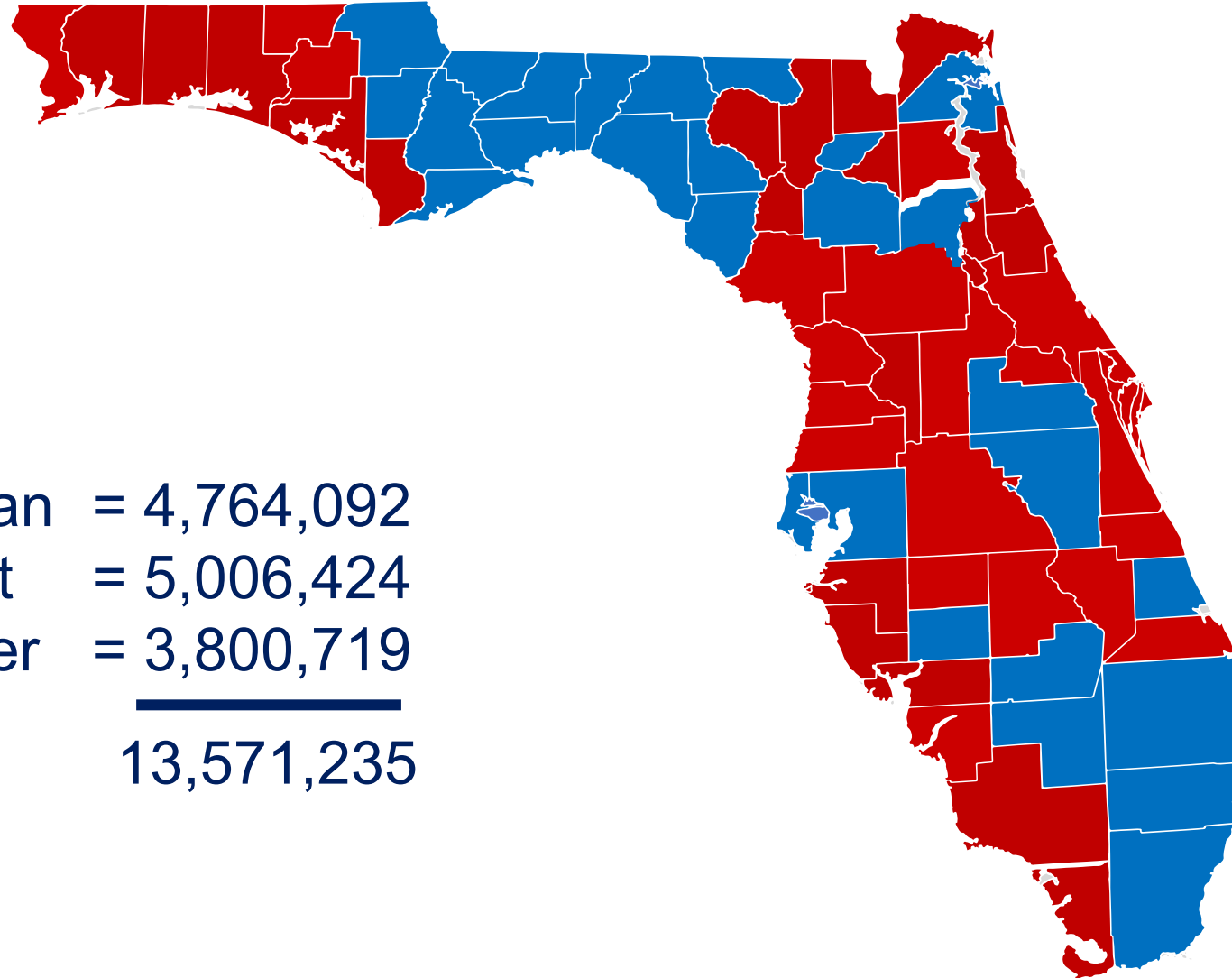
Republican = 4,764,092
Democrat = 5,006,424
NPA/Other = 3,800,719

13,571,235

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Registration Comparisons Over Time

Florida

Total State: 13,571,235

35% (4,764,092)	37% (5,006,424)	28% (3,800,719)

October: 63,308

30% (19,163)	29% (18,692)	41% (25,453)
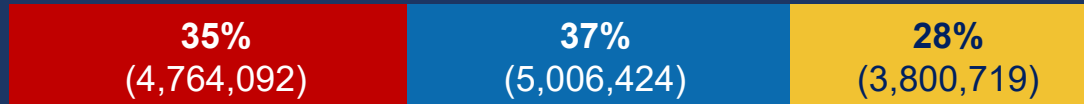
Year to Date: 525,150
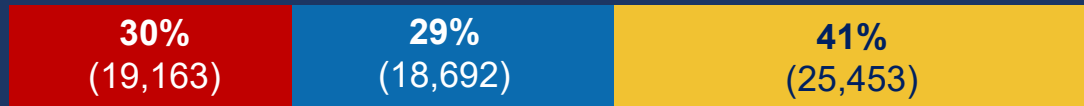
30% (156,462)	30% (159,638)	40% (209,050)
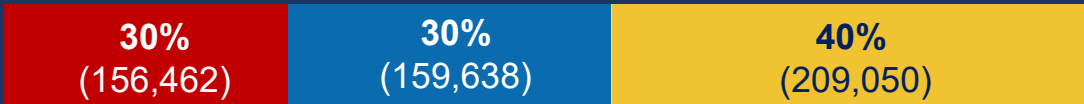
Since Last Election: 603,077

30% (181,312)	30% (182,011)	40% (239,754)
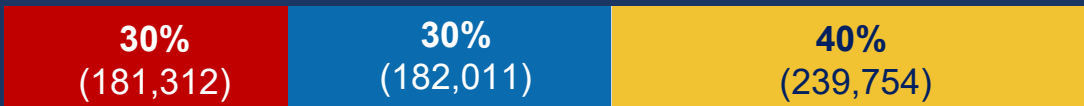
Volusia County

Total County: 386,499

36% (139,435)	34% (130,331)	30% (116,733)

October: 2,059

30% (613)	31% (652)	39% (794)

Year to Date: 15,156

32% (4,946)	28% (4,188)	40% (6,022)

Since Last Election: 17,278

33% (5,693)	26% (4,735)	41% (6,850)
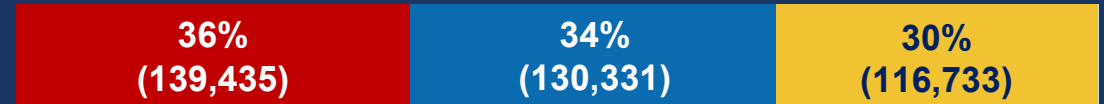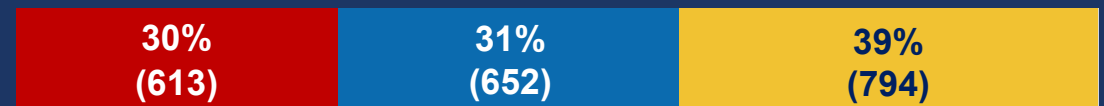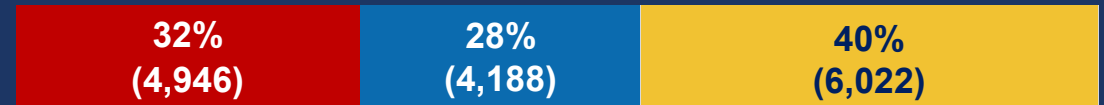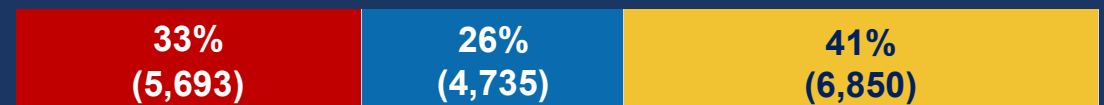
Legend:
- Republican
- Democrat
- NPA/Other

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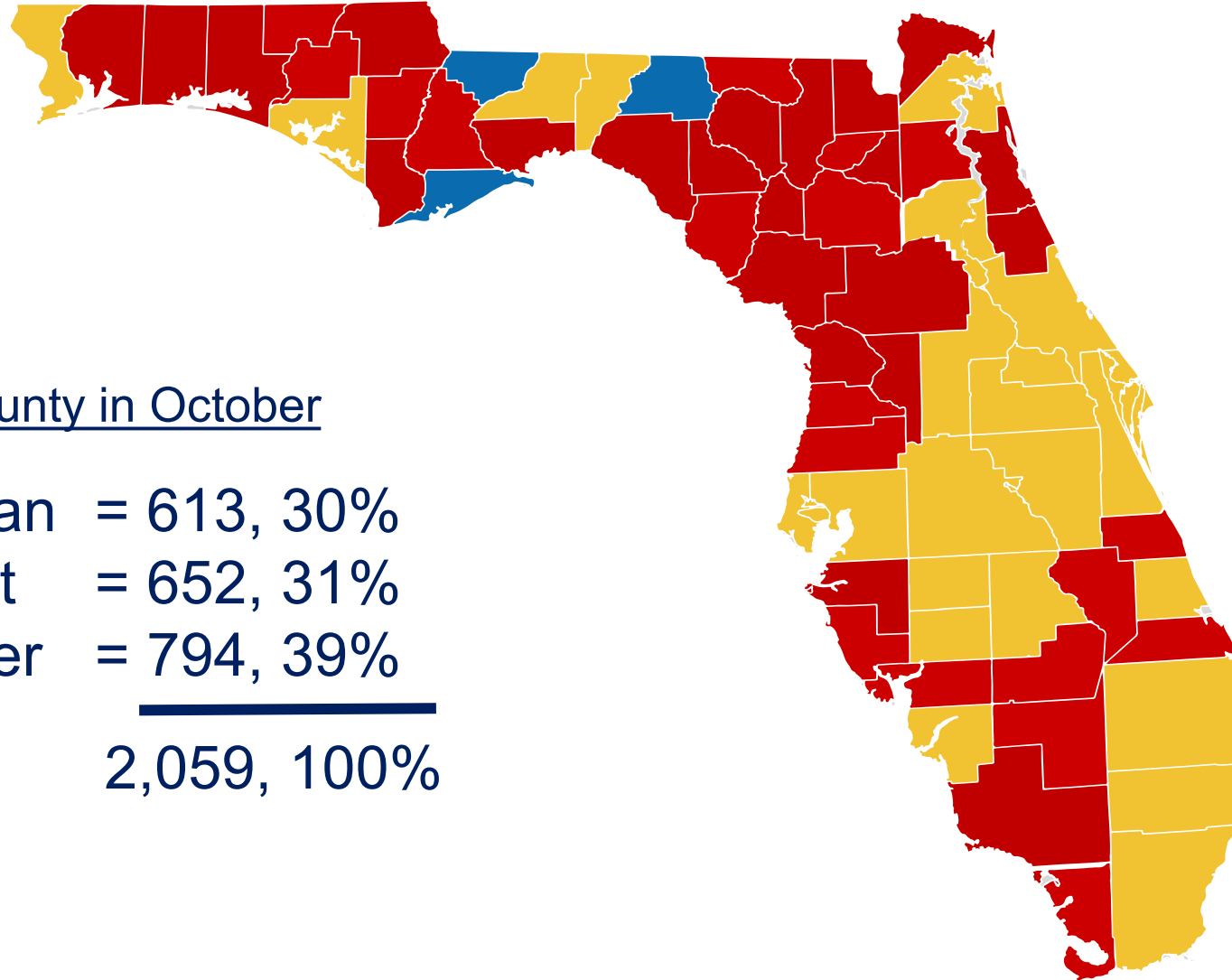
Volusia County in October

■ Republican = 613, 30%
■ Democrat = 652, 31%
■ NPA/Other = 794, 39%
_____
2,059, 100%

FLORIDA
CHAMBER
of Commerce

Top Voter Concerns

| Statewide	Healthcare	Education	Immigration	Other
	13	12	11	Enviro. 10% Jobs 9%
Men	13	7	10	Jobs 12%
Women	12	17	12	Enviro. 10%
Republicans	10	10	21	Jobs 12%
Democrats	15	13	4	Enviro. 15%
NPA/Other	13	16	4	Jobs 7%
White	10	13	13	Enviro. 13%
Black	16	12	2	Jobs 10%
Hispanic	14	11	9	Jobs 6%

FLORIDA CHAMBER of Commerce

Political Views Impact Policy Decisions

Right Direction vs. Wrong Direction

Statewide	56:26
Jacksonville	56:25
Gainesville	42:42
Tallahassee	63:13
Panama City/Pensacola	64:19
Orlando/Daytona	59:25
Tampa/St. Pete	60:24
Ft. Myers/Naples	49:21
Broward/Miami	53:34
West Palm	53:23

Statewide	56:26
Men	63:21
Women	50:31
Republicans	79:12
Democrats	34:41
Others	58:22
White	60:22
Black	35:43
Hispanic	61:27

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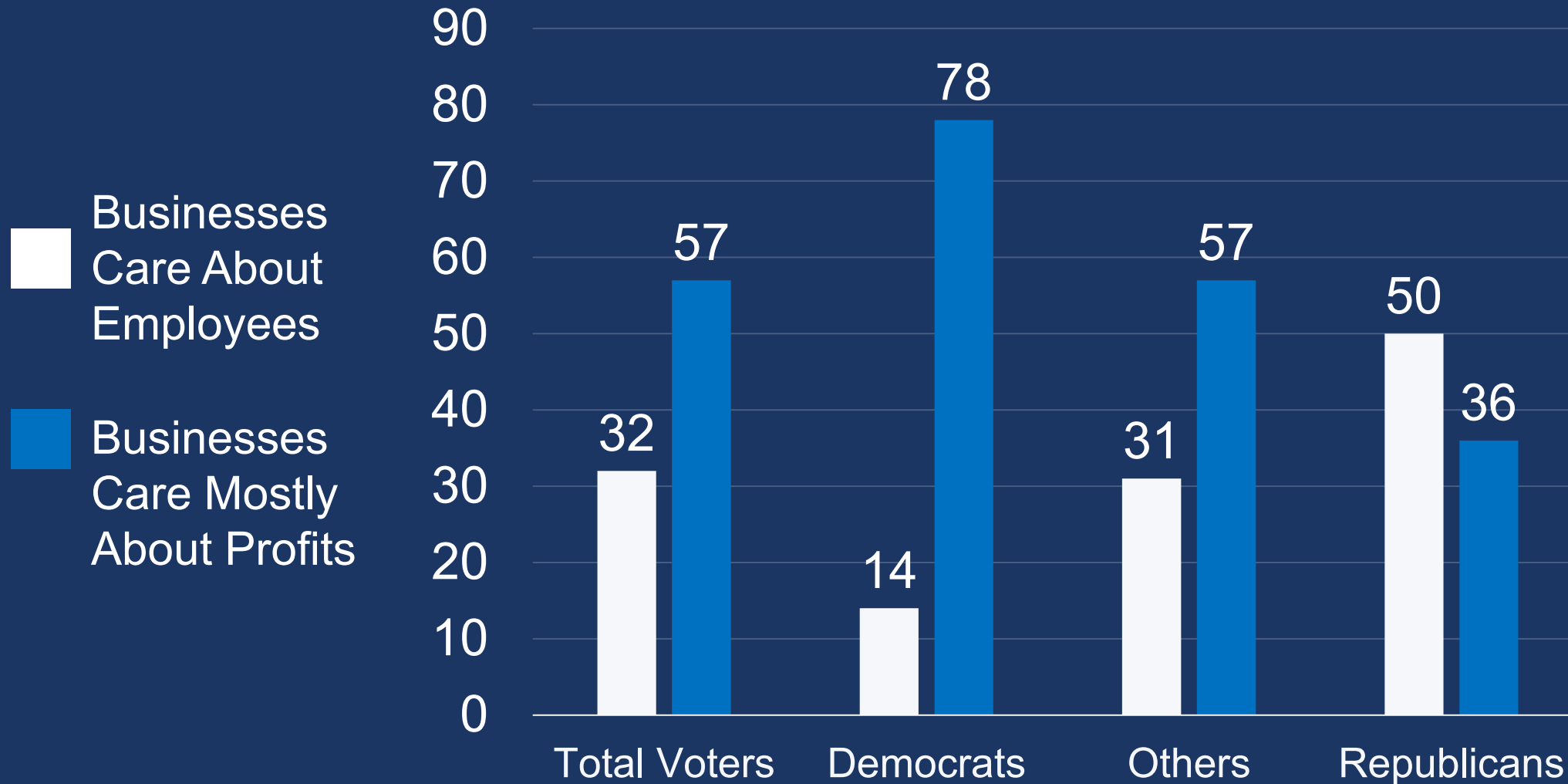
Uniting Business for Good

Transportation, Growth and Infrastructure Summit
Hollywood, FL
December 5, 2019

2020 Legislative Fly-In
Tallahassee, FL
January 14-15, 2020

Business Leaders Summit on Prosperity and Economic Opportunity
West Palm Beach, FL
May 22-23, 2020

Learners to Earners Workforce Summit
Orlando, FL
June 2020

FLORIDA CHAMBER of Commerce

Register at **www.FloridaChamber.com/events**

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