



**FLORIDA
CHAMBER**
of Commerce

RELAUNCH FLORIDA

Uniting Business for Good

Florida Chamber Federation Monthly Update

September 22, 2020

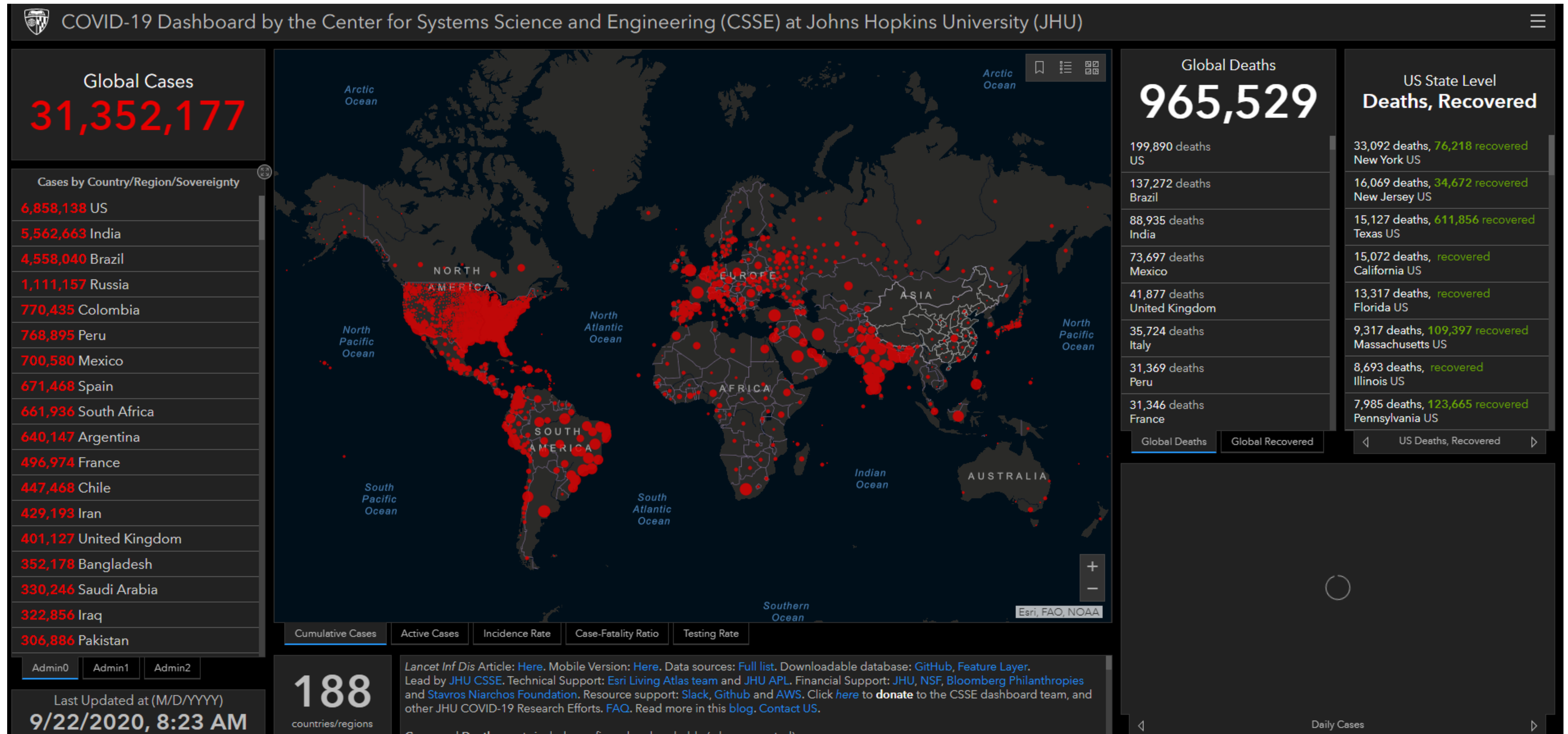
mwilson@flchamber.com

**FLORIDA
CHAMBER**
of Commerce

Monthly Federation Update Agenda

- I. Welcome and What to Expect Today
- II. COVID-19 Tracking and Trends
- III. Local Chamber Survey Results
- IV. 2020 Future of Florida Forum Overview
- V. Federal “Phase 4”
- VI. General Election State of Play
- VII. Why the Florida Chamber Believes Amendment 2 (\$15 Minimum Wage Mandate) is Bad for Florida
- VIII. Back to School and Childcare Issues Update
- IX. Open Discussion and Q&A

188 Nations / Territories – 14 Million Visitors



A man with a grey beard and mustache, wearing a dark blue pinstripe suit, white shirt, and a red and blue striped tie, is speaking at a podium. He is holding a small black object in his right hand. The background features a large banner with the text "FLORIDA CHAMBER of Commerce" and the Great Seal of the State of Florida. An American flag is visible on the left side of the frame.

**FLORIDA
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of Commerce

II. COVID-19 Tracking and Trends

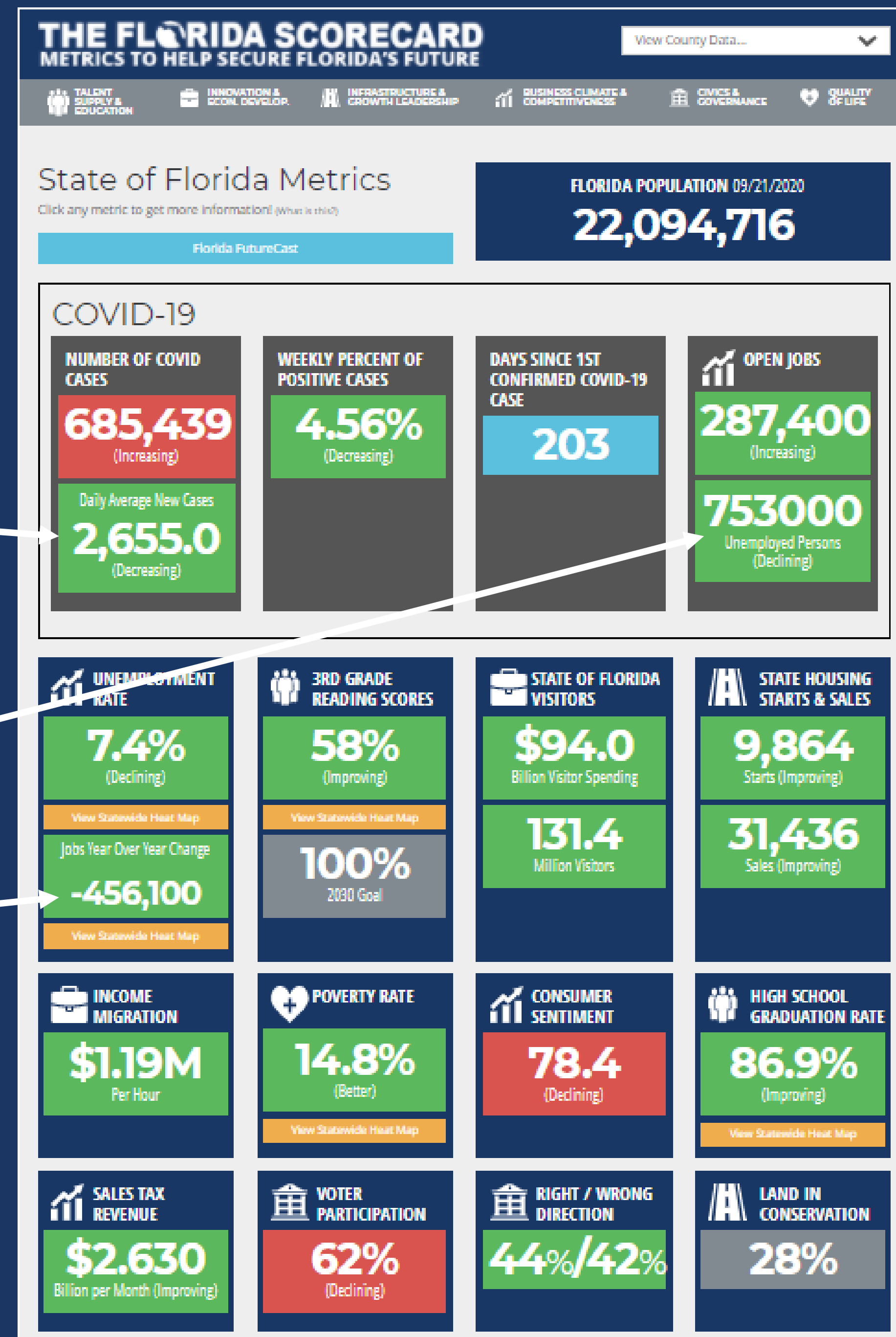
Dr. Jerry Parrish

www.theFloridaScorecard.org

Florida's Average Daily COVID cases at 23% of peak shown on July 25 (59 days ago)

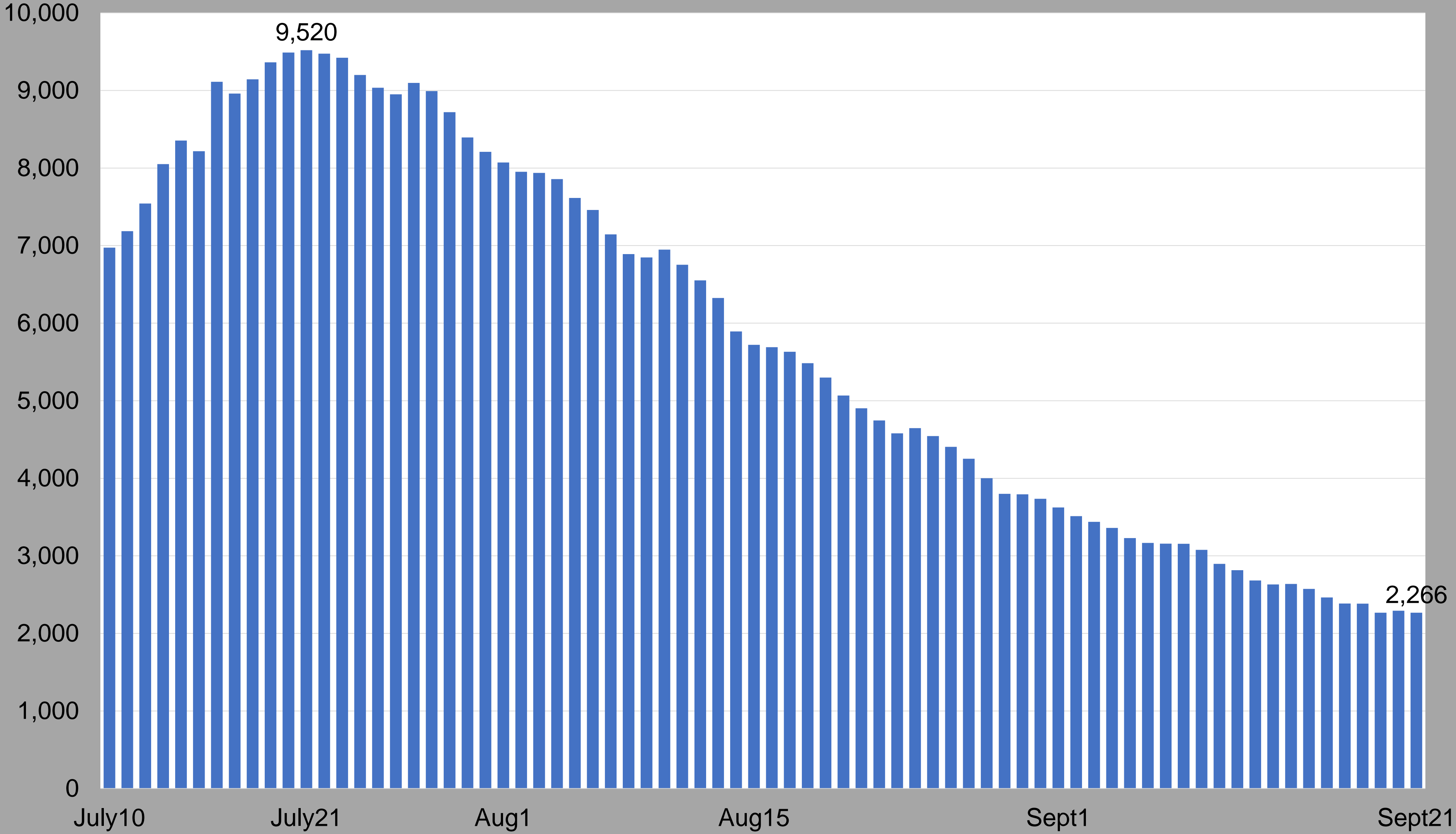
Unemployment rate down substantially, but still have 753,000 Floridians who are unemployed

Florida has 456,100 fewer jobs than at the same time last year

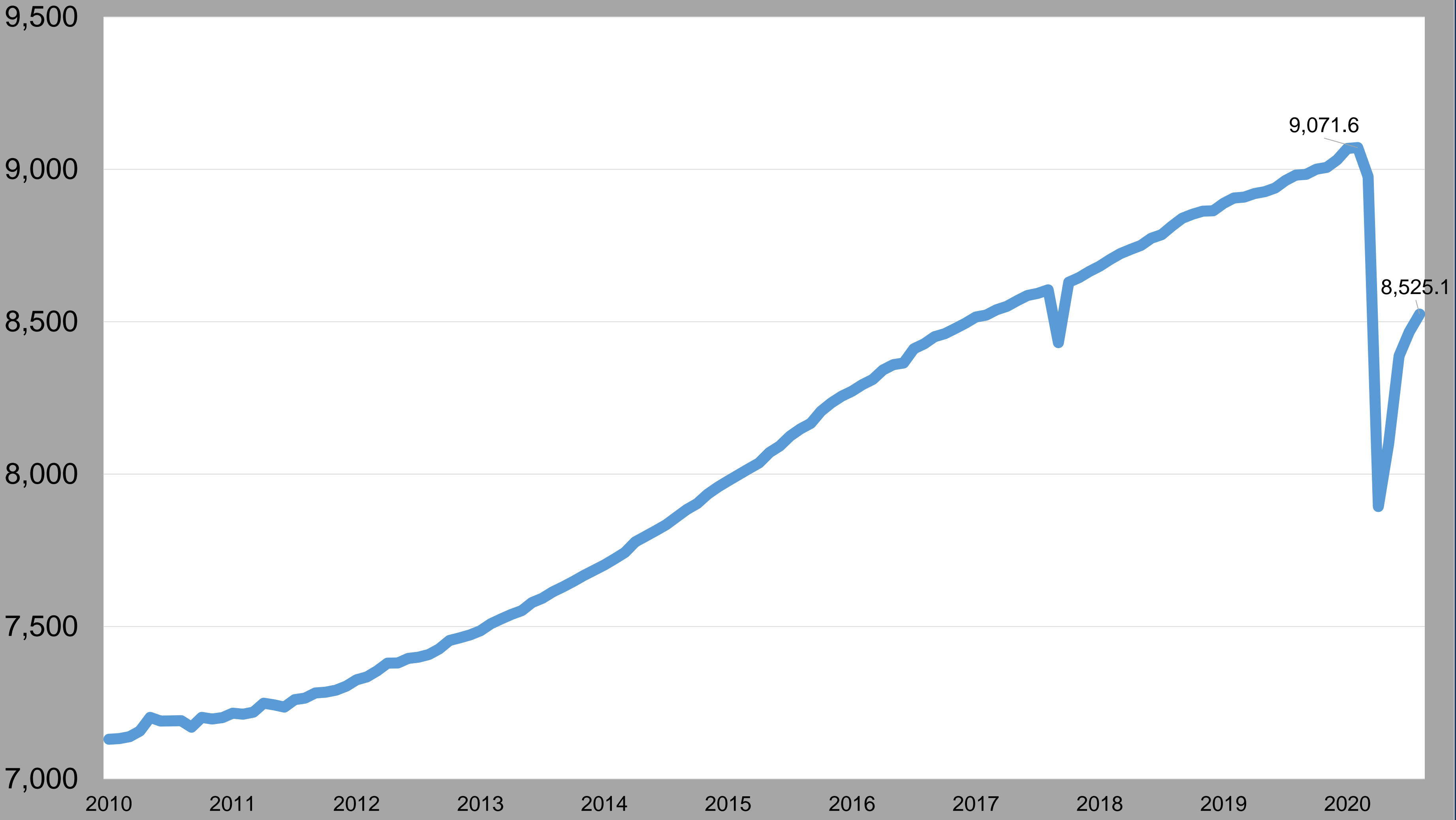


Current COVID Hospitalizations - Florida

Peaked July 21. Now 23.8% of Peak

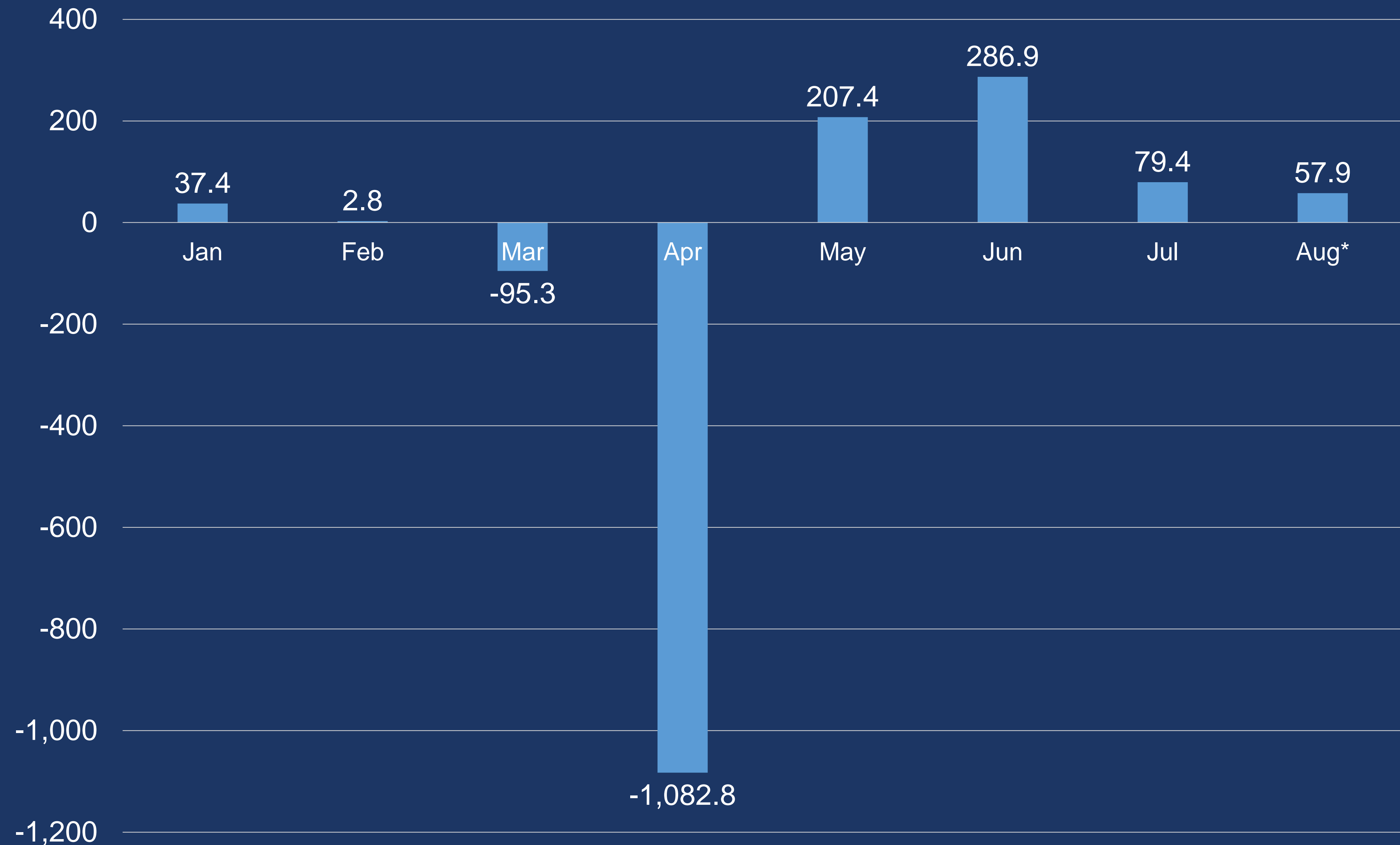


Florida non-farm Jobs
(thousands)



Data Source: U.S. Bureau of Labor Statistics (BLS)

2020 Month-over-Month Job Gains/Losses (thousands)



Data Source: U.S. Bureau of Labor Statistics, seasonally adjusted

Job Loss by Category: August 2019 to August 2020

Industry	Job Change	Percent of Industry
Total – All Industries	-456,100	-5.1%
Leisure & Hospitality	-249,400	-19.8%
Professional & Business Services	-69,600	-5.0%
Trade, Transportation & Utilities	-54,500	-3.0%
Other Services	-30,200	-8.5%
Education & Health Services	-16,400	-1.2%
Manufacturing	-11,500	-3.0%
Financial Activities	-8,100	-1.4%
Construction	-5,500	-1.0%

Year-over-year Job Change

Industry	Jobs	Percent
Leisure & Hospitality	-249,400	-19.9%
Accommodation & Food Services	-201,400	-19.8%
Arts, Entertainment & Recreation	-48,000	-19.9%
 Trade, Transportation and Utilities	 -54,500	 -3.0%
Wholesale Trade	-12,100	-3.4%
Retail Trade	-38,200	-3.4%
Transportation, Warehousing & Utilities	-4,200	-1.2%
 Education & Health Services	 -16,400	 -1.2%
Educational Services	-5,400	-3.1%
Health Care and Social Assistance	-11,000	-0.9%

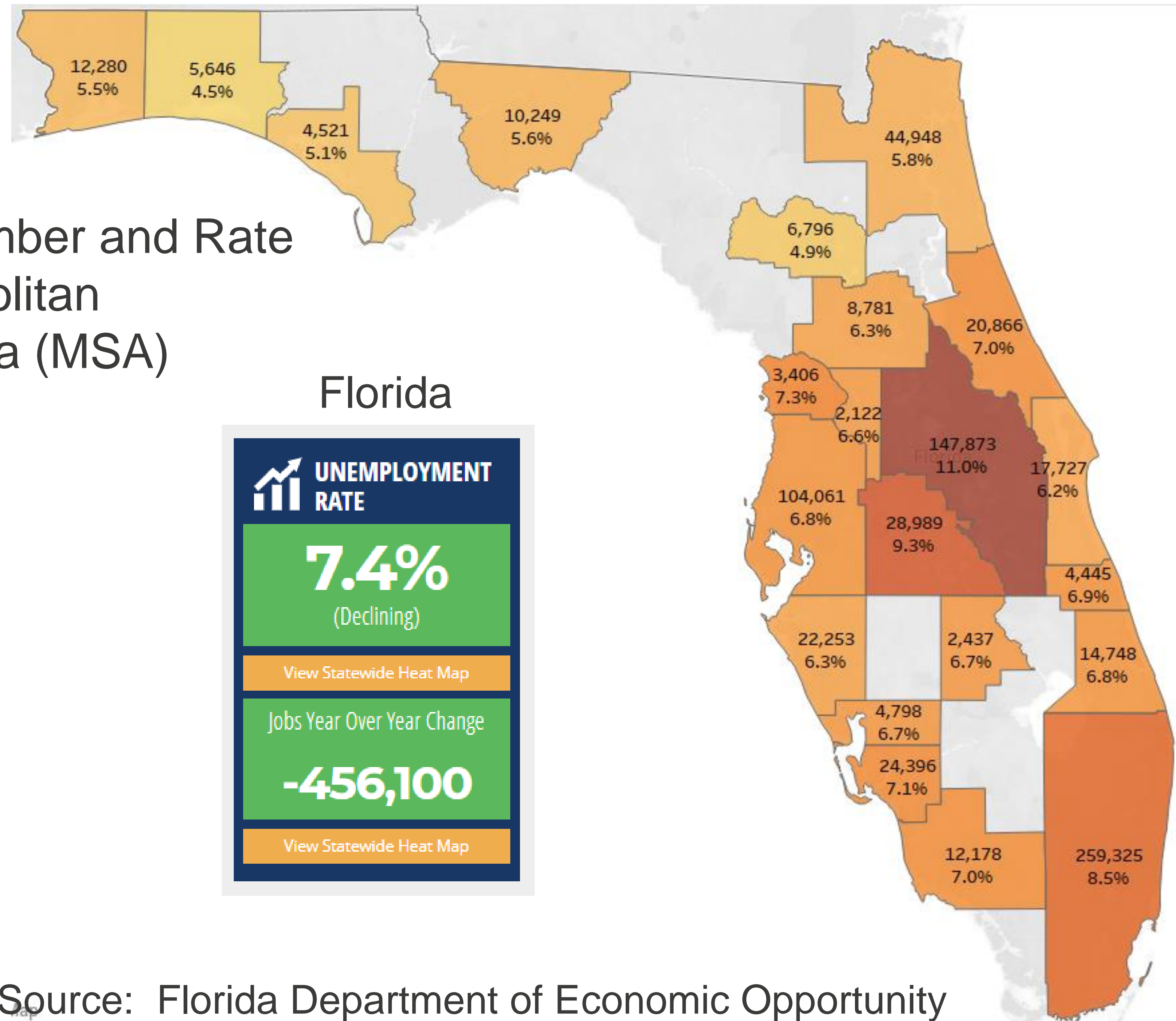
Year-over-year Job Change: August '19 to August '20

Industry	Jobs	Percent
Leisure & Hospitality	-249,400	-19.9%
Accommodation & Food Services	-201,400	-19.8%
<hr/>		
Arts, Entertainment & Recreation	-48,000	-19.9%

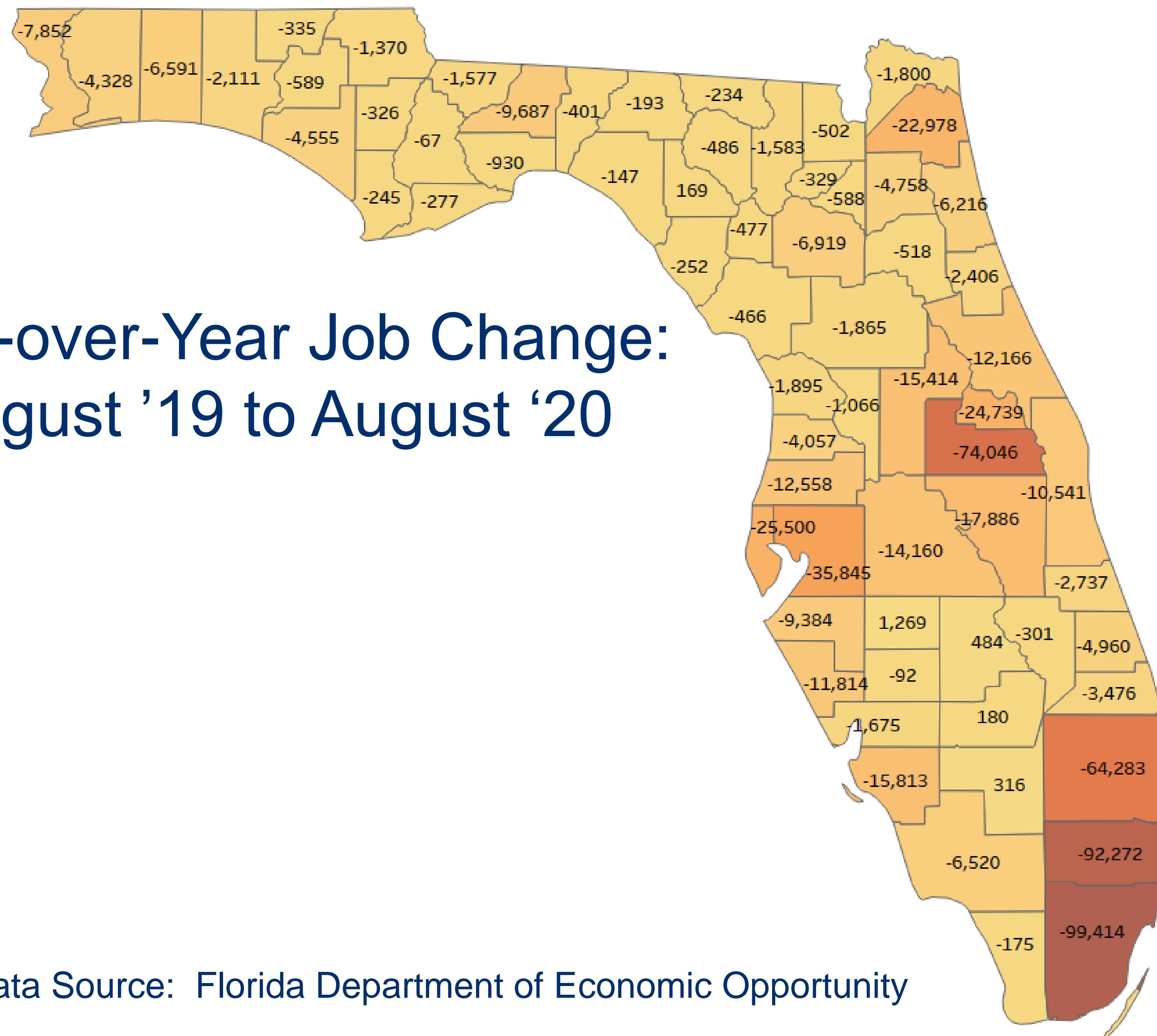
Year-over-year Job Change: August '19 to August '20

Industry	Jobs	Percent		
Leisure & Hospitality	-249,400	-19.9%		
Accommodation & Food Services	-201,400	-19.8%	Jobs	Percent
	Accommodation		-73,700	-38.1%
	Food Services/Drinking Places		-126,300	-15.5%
Arts, Entertainment & Recreation	-48,000	-19.9%		
	Amusement Parks and Arcades		-27,900	-33.6%

Unemployment Number and Rate by Metropolitan Statistical Area (MSA)



Year-over-Year Job Change: August '19 to August '20



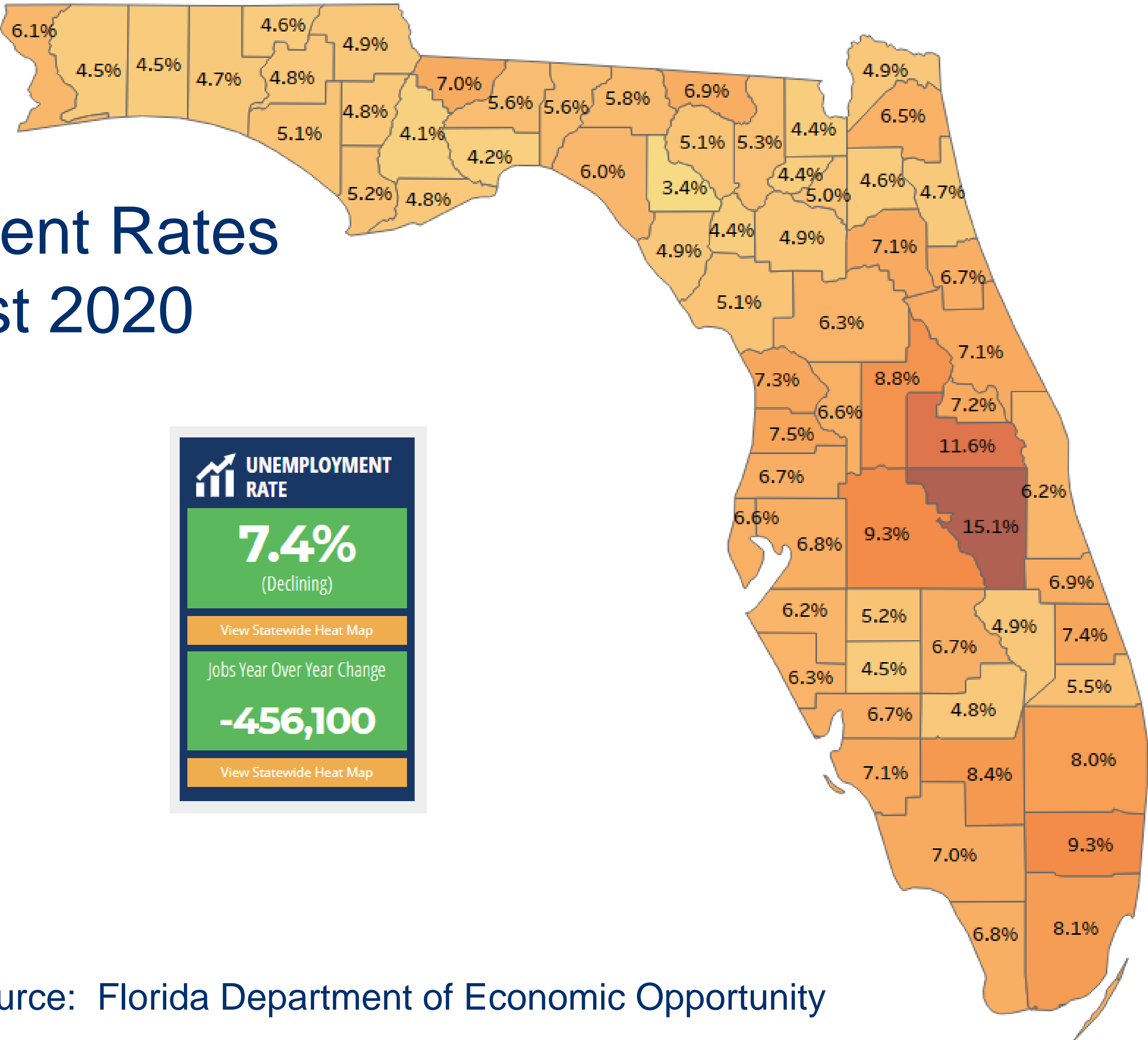
Data Source: Florida Department of Economic Opportunity


Year-over-Year Job Percent Change: August '19 to August '20

The map displays the following data points for each county (from north to south, west to east):

County	Percent Change
Alameda	-5.5%
Alameda	-5.3%
Alameda	-6.8%
Alameda	-6.7%
Alameda	-5.1%
Alameda	-8.3%
Alameda	-6.2%
Alameda	-5.5%
Alameda	-7.1%
Alameda	-2.7%
Alameda	-4.4%
Alameda	-6.1%
Alameda	-6.5%
Alameda	-7.5%
Alameda	-1.8%
Alameda	-2.7%
Alameda	-5.6%
Alameda	-2.8%
Alameda	-5.5%
Alameda	-4.3%
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Alameda	-4.8%
Alameda	-4.8%
Alameda	-5.3%
Alameda	-4.9%
Alameda	-10.0%
Alameda	-9.9%
Alameda	-9.9%
Alameda	-10.0%
Alameda	-3.8%
Alameda	-4.4%
Alameda	-3.6%
Alameda	-4.9%
Alameda	-9.1%
Alameda	-9.1%
Alameda	-7.4%
Alameda	-0.4%
Alameda	-3.9%
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Alameda	-3.6%
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Alameda	-9.1%
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Alameda	-7.4%
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Alameda	-3.9%
Alameda	-4.7%
Alameda	-2.4%
Alameda	-0.7%
Alameda	-6.5%

Unemployment Rates for August 2020



 **UNEMPLOYMENT RATE**

7.4%
(Declining)

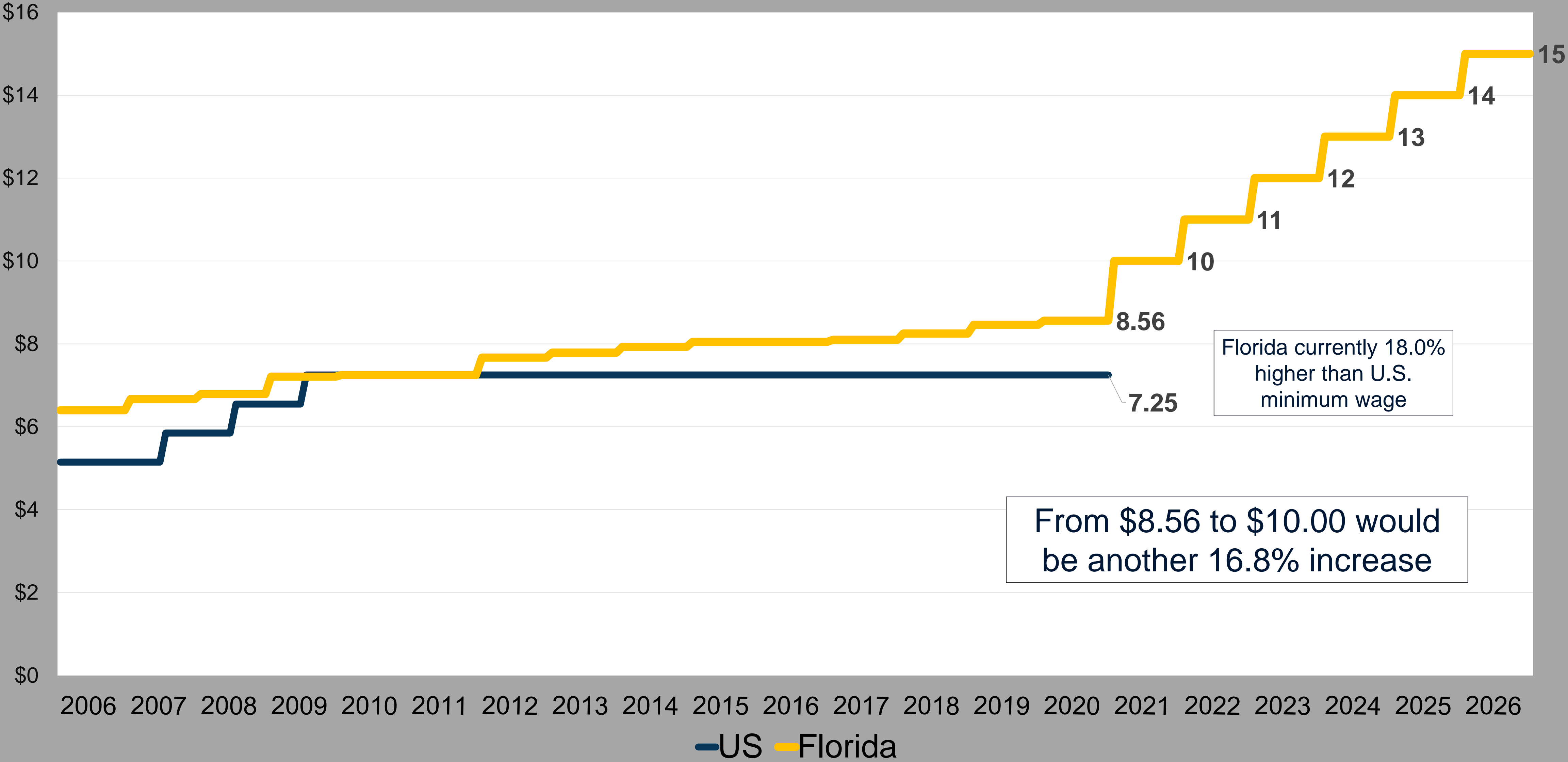
[View Statewide Heat Map](#)

Jobs Year Over Year Change

-456,100

[View Statewide Heat Map](#)

Florida and U.S. Minimum Wage – plus proposed increases



From: How Many Jobs Would the \$15 Minimum Wage Kill?

Michael Saltzman, July 2020, Wall Street Journal

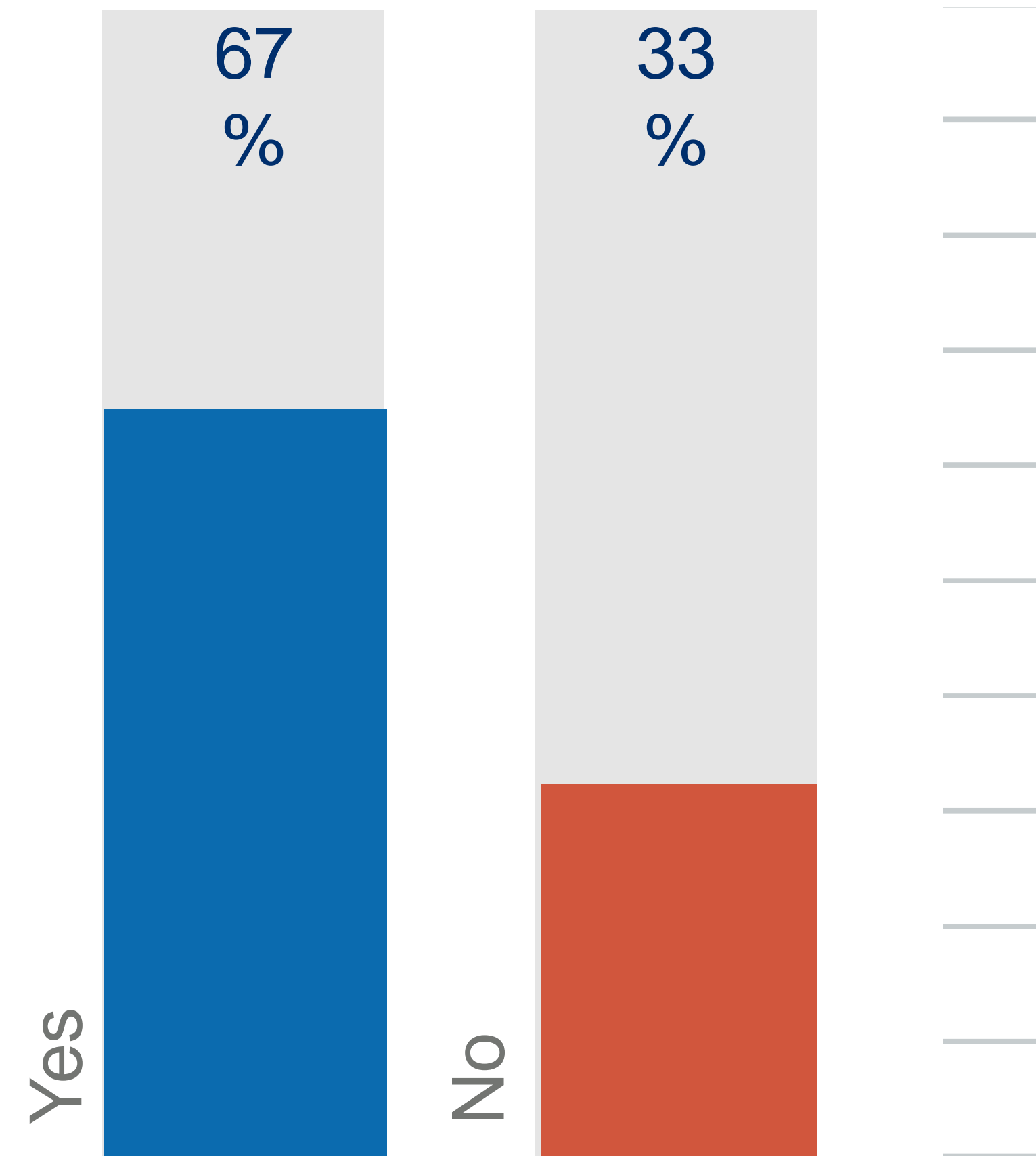
“.....as many as three people would lose their jobs for each person no longer in poverty.”

Source: <https://www.wsj.com/articles/how-many-jobs-would-the-15-minimum-wage-kill-11562626215>

III. Local Chamber Survey Results

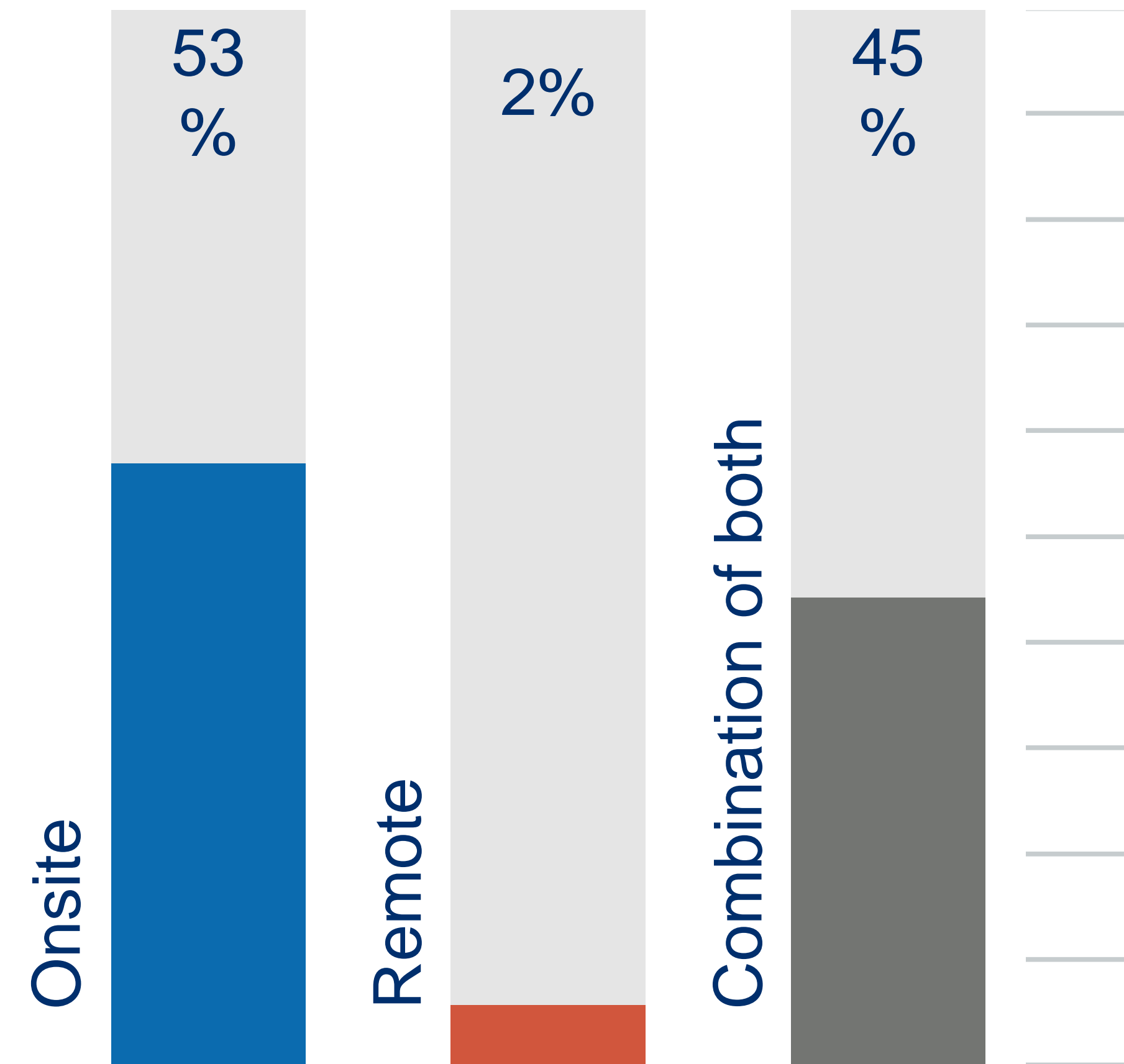
Local Chamber Survey Results

Is your chamber office
open to outside visitors?



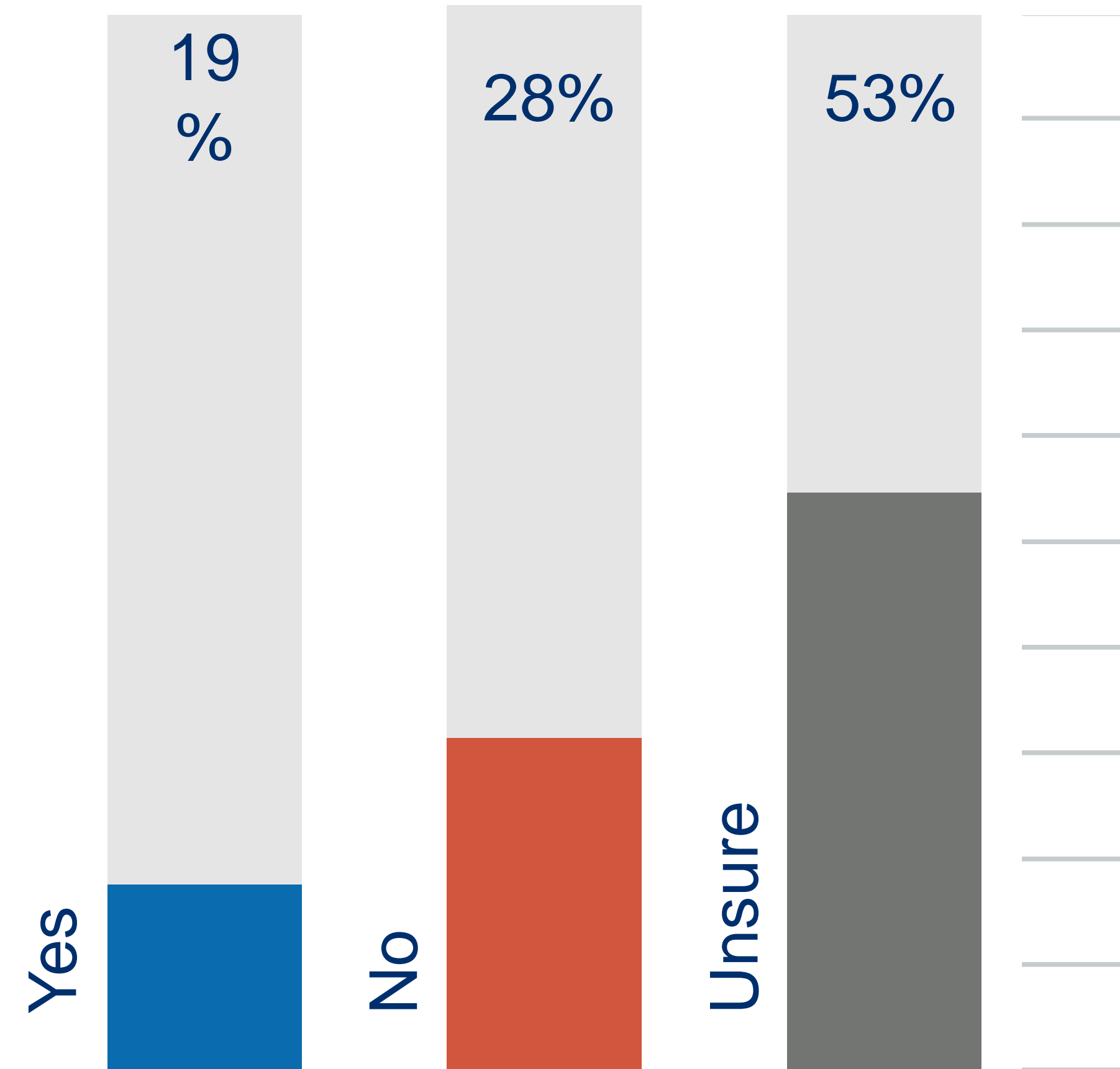
Local Chamber Survey Results

Are your employees
working onsite or remote?



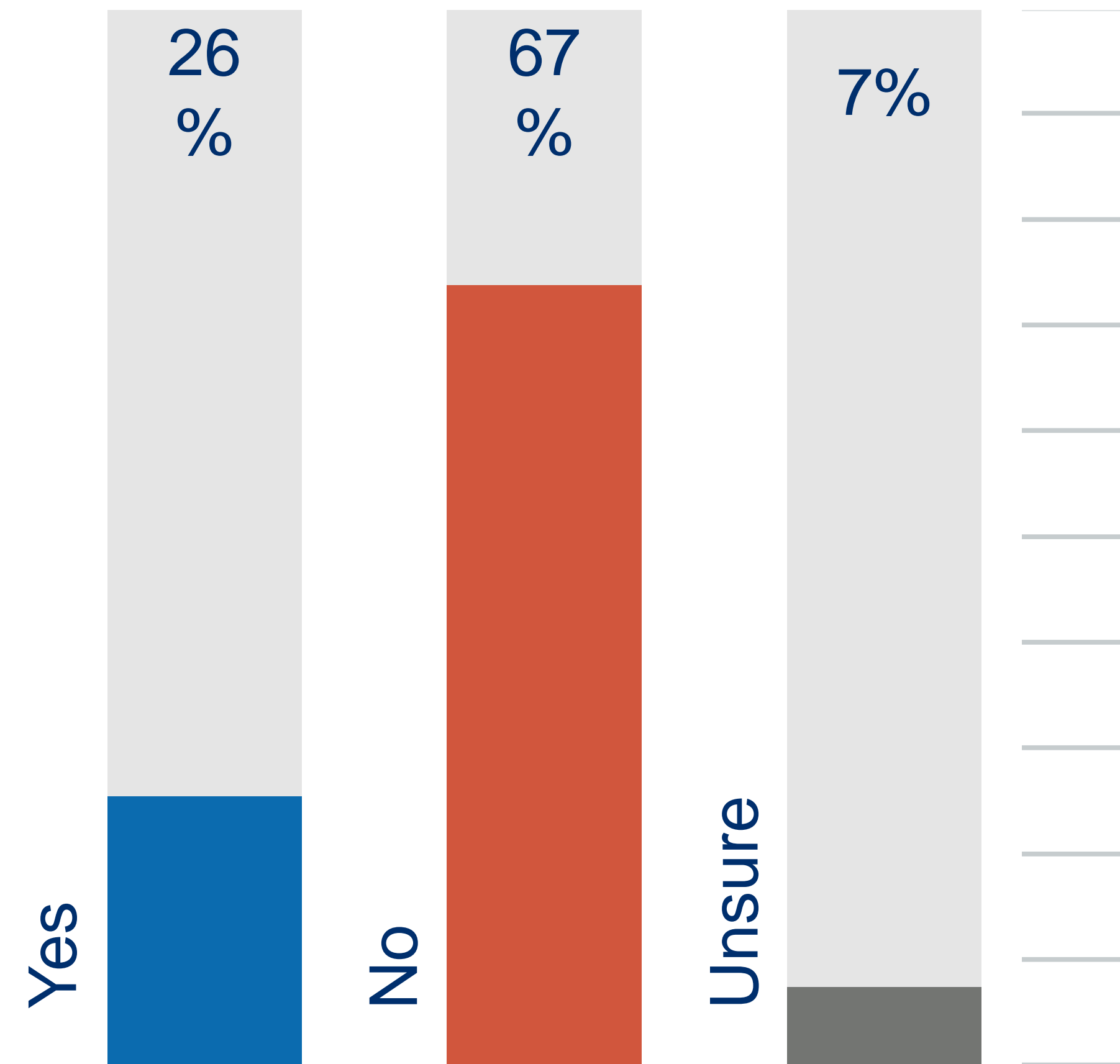
Local Chamber Survey Results

Have any of your board members tested positive for COVID-19?



Local Chamber Survey Results

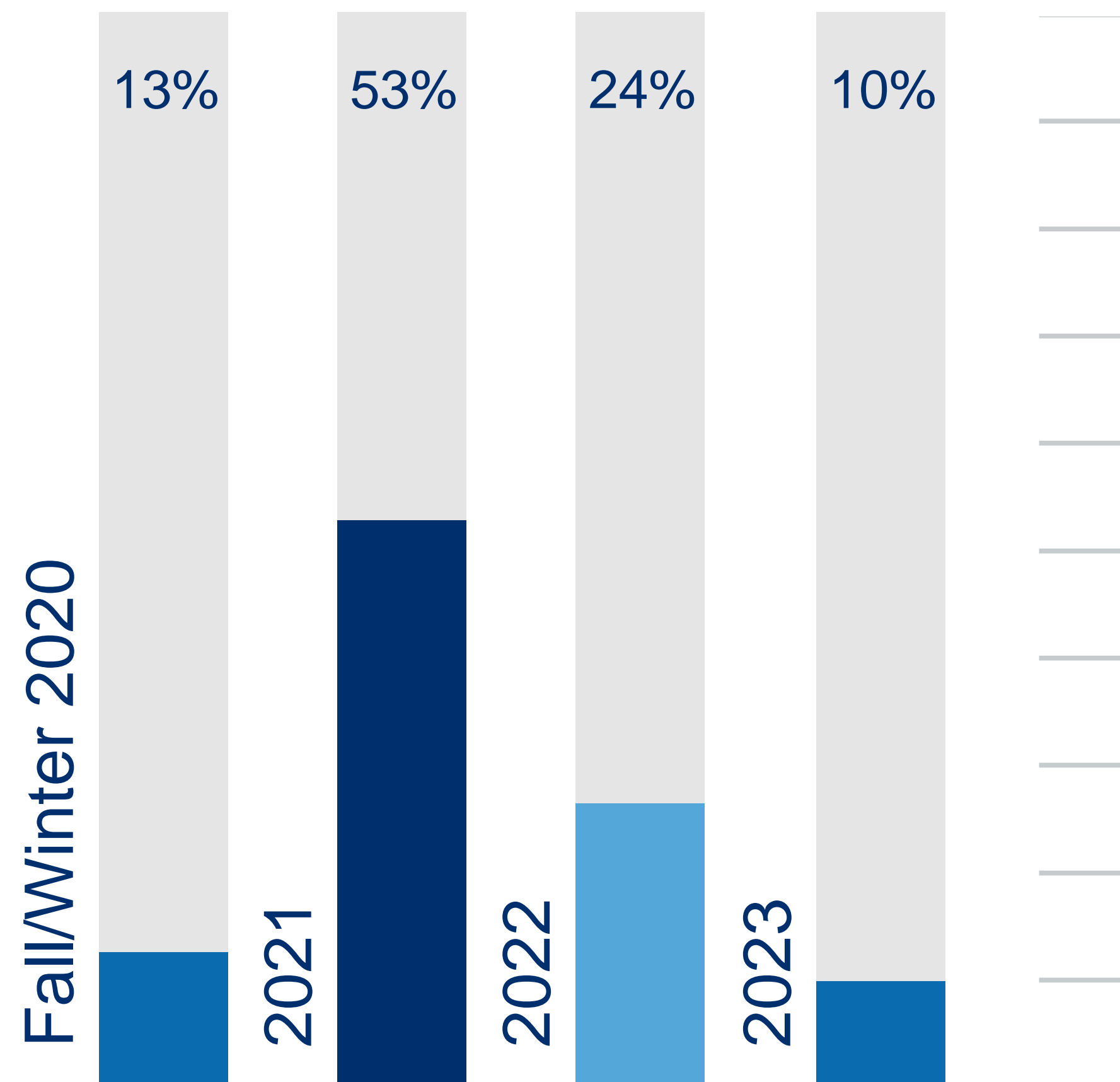
Have any of your staff members tested positive for COVID-19?



Local Chamber Survey Results

Here's what FSAE told us on August 11, 2020 (with 145 responses)

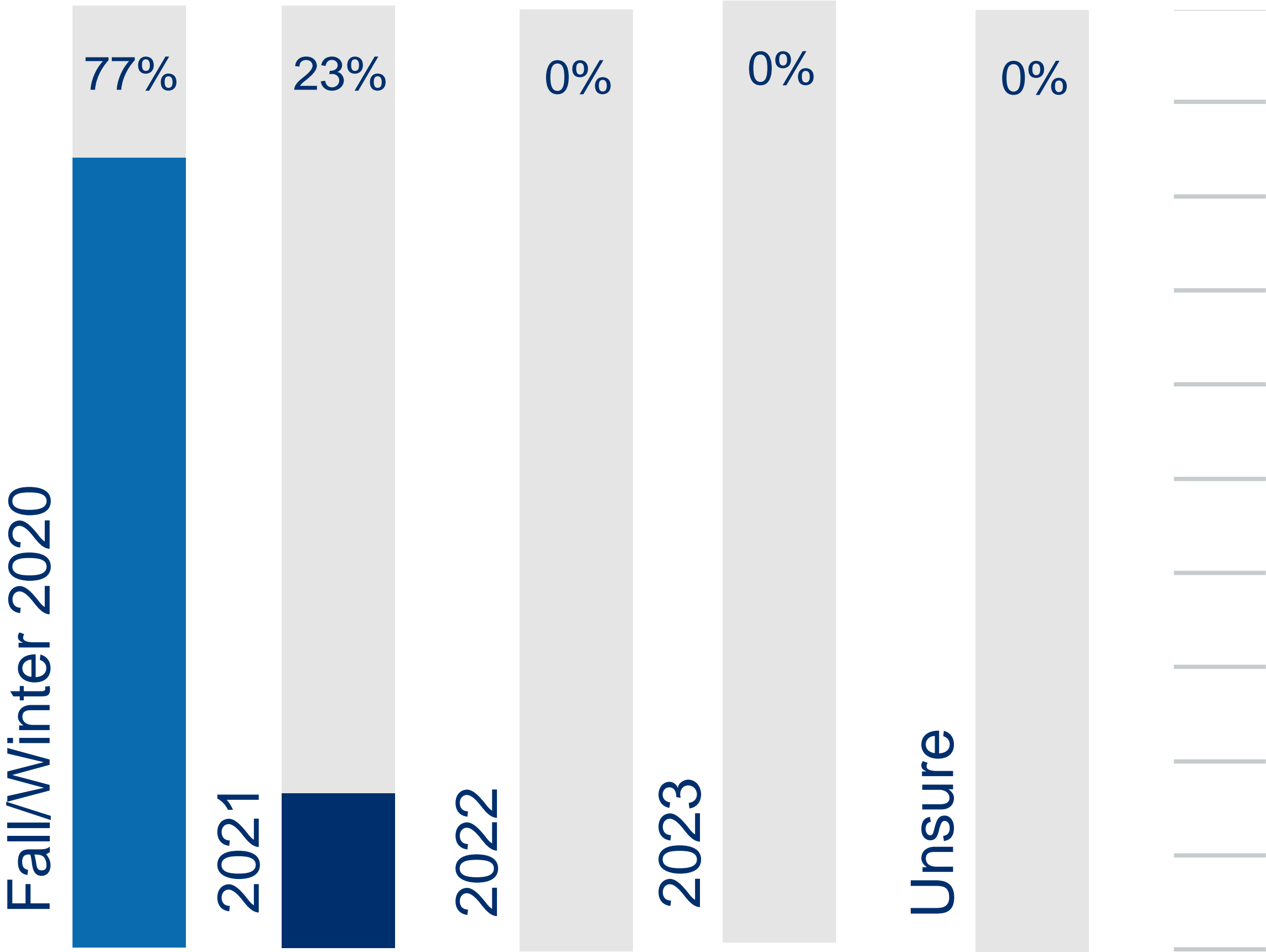
When are you looking to book your organization's next in-person meeting?



Local Chamber Survey Results

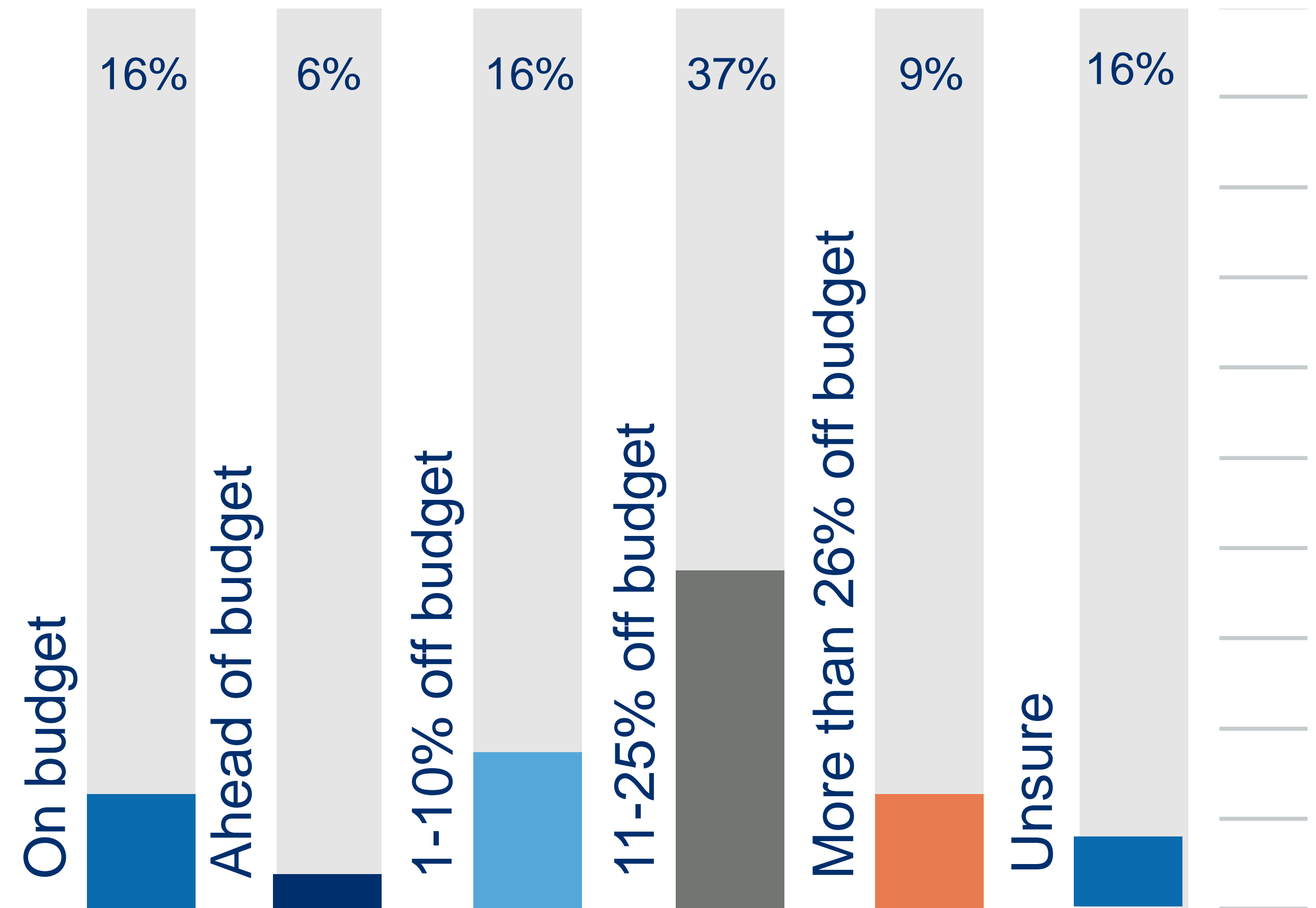
Here's what you told us

When are you looking to book your organization's next in-person meeting?



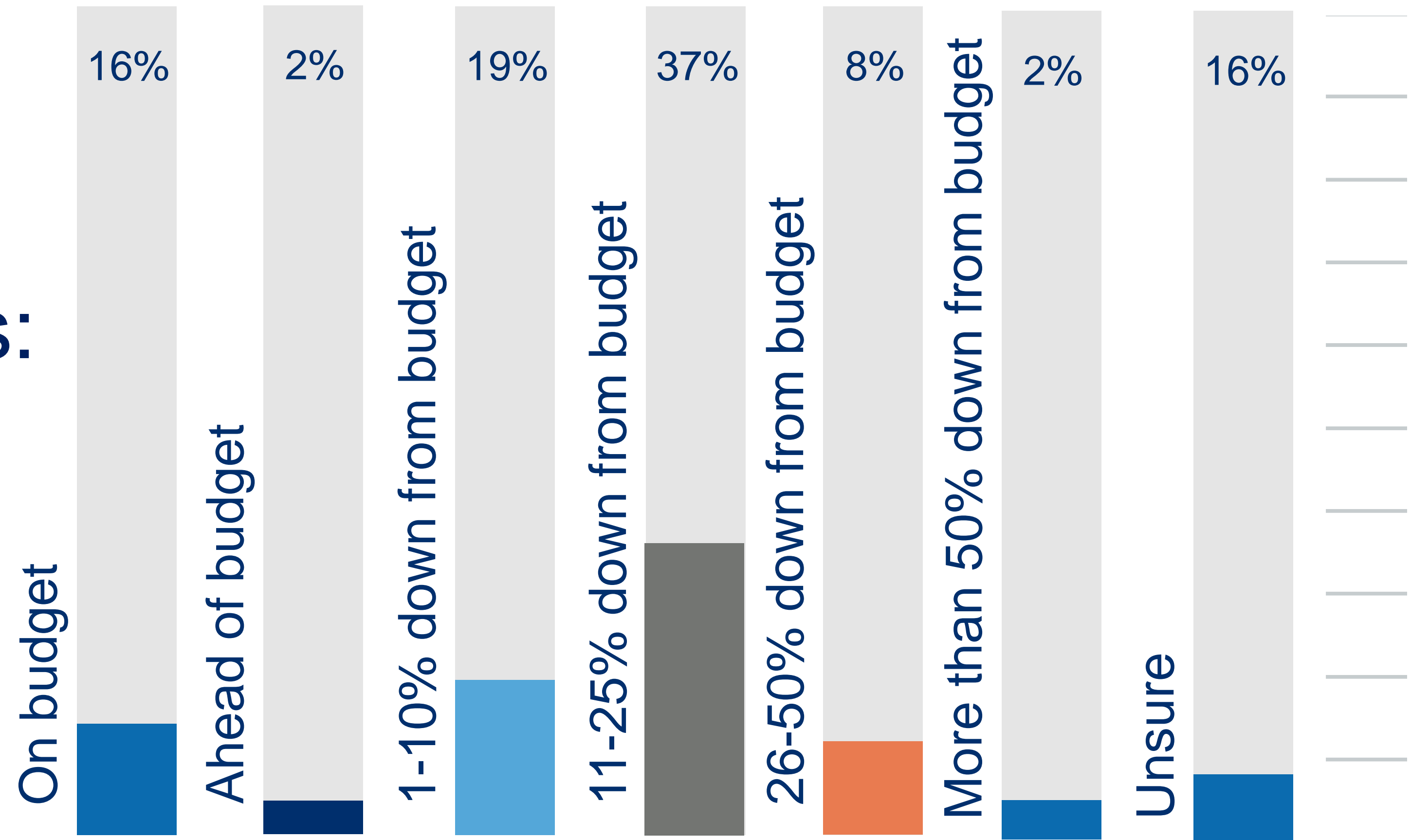
Local Chamber Survey Results

Are your membership dues renewal dollars:



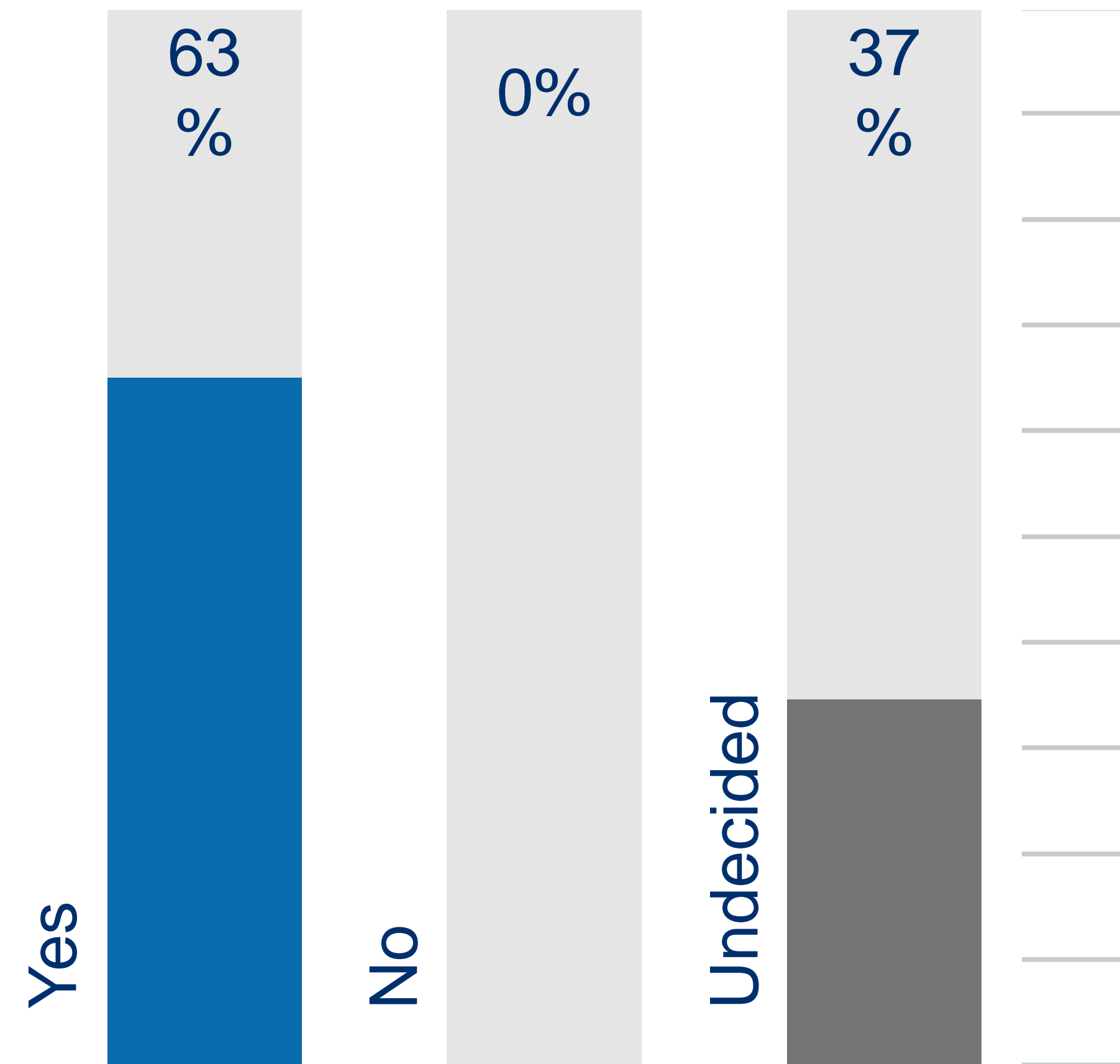
Local Chamber Survey Results

Are your new membership dues:



Local Chamber Survey Results

Will you stand with the
Florida Chamber against
Amendment 2 and the
\$15 minimum wage
mandate?



Upcoming Chamber Events

- **Florida Chamber Annual Conference & Future of Florida Forum (Virtual)**
October 20, 21, & 22 (1:00 – 4:00 p.m. EST each day)
- **October Florida/Local Chamber Federation Call**
October 27 from 2:00 – 3:30 p.m. EST
- **Florida Chamber Insurance Summit (Virtual)**
November 5 - 6 from 10:00 – 3:15 p.m. EST

IV. 2020 Future of Forum Overview



Just Some of Future of Florida Forum's Speakers...

Jerry D. Parrish, Ph.D., Chief Economist, Florida Chamber Foundation



By the Numbers: The Future of Florida's Economy

Patrick "Pat" Geraghty, President & CEO, Florida Blue



The Employer's Guide to COVID-19 Testing

Ashley Moody, Florida Attorney General



Securing the Future of Florida's Senior Community

Mike Massimino aka "Astro Mike", Professor of Mechanical Engineering at Columbia University and former NASA astronaut



Shelter in Space: NASA's Approach to Lack of Human Contact, Isolation and Safety

Beth Kigel, Vice President/Director of Smart and Connected Solutions, HNTB Corporation; Chair, Autonomous Florida



Florida: The Autonomous Capital of the World

Doug Wheeler, President & CEO, Florida Ports Council



The Future of Florida Ports: Delivering Your World

Joe Lopano, CEO, Tampa International Airport



Ready for Take Off: The Future of Air Travel in Florida

Ananth Prasad, President, Florida Transportation Builders Association



Roadways of the Future

Barbara Humpton, President & CEO, Siemens USA



How to Build a More Resilient and Inclusive Future

Brittany Birken, Ph.D., Principal Adviser, Community and Economic Development Group, Federal Reserve Bank of Atlanta



Equity Gaps x 10: Understanding the Ten Root Causes of Poverty

Pastor Miles McPherson, Founder, Rock Church, San Deigo; Former NFL player



The Third Option: Hope for a Racially Divided Nation

Rep. Vance Aloupis, CEO, The Children's Movement



The Business Case for Early Learning

Frank Dibello, CEO, Space Florida



Space Force: The Last Frontier

Dana Young, CEO, Visit Florida



#LoveFL: Trailblazers in Tourism

Jimmy Patronis, Chief Financial Officer, Florida



The Future of Florida's Budget

Nikki Fried, Florida Commissioner of Agriculture



Syd Kitson, Chairman and CEO, Kitson & Partners



**Building for 2030: Sustainable
Communities of the Future**

The Mission Crew is Growing and Being Unveiled Daily at
www.FLChamber.com/FutureofFloridaForum

2020 Virtual Future of Florida Forum & Annual Meeting



**Relaunch & Reimagine Florida's Future
Stronger Together, Reuniting Business For Good**

**Tuesday, October 20 – Thursday, October 22
1 – 4 p.m. EDT Each Day**

Register at

www.FloridaChamber.com/Events

V. Federal “Phase 4” Update



Details of Phase 4

- Senate Republicans Proposed:
 - Price tag- approx. \$1 trillion
 - Focus on getting kids back to school
 - Funding for COVID-19 testing & tracing
 - PPP Funding, likely with tighter restrictions on who qualifies
 - Extension of federal bonus for unemployment insurance
 - Second round of stimulus checks, likely with a lower income threshold
 - Liability Protections
 - Local & State Aid

Negotiations with House Democrats broke down, consequently likely will not see a stand-alone package until after the 2020 election

VI. General Election State of Play

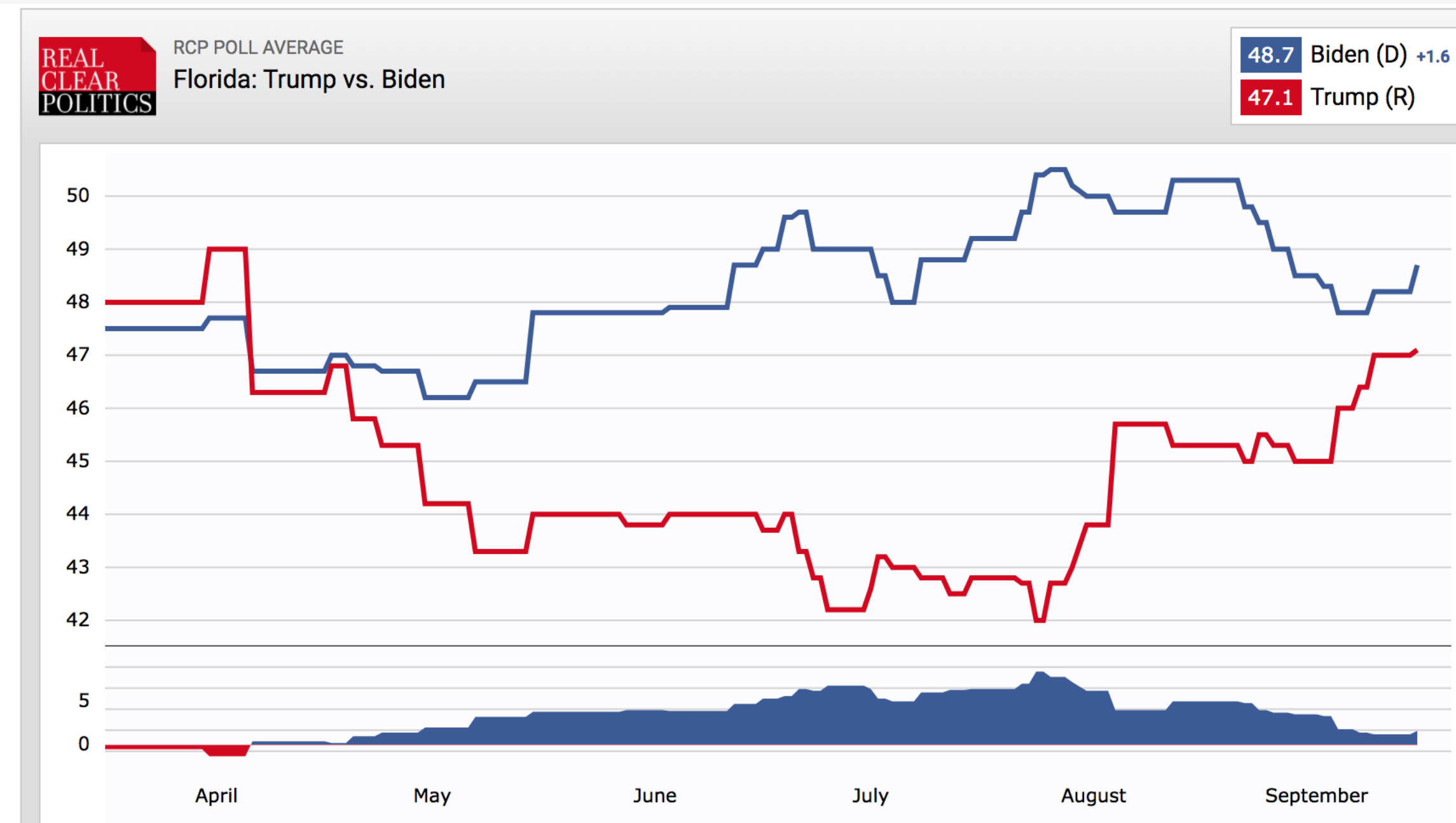


How Bloomberg's \$100 million
Florida bet may shape campaign
9/16/20

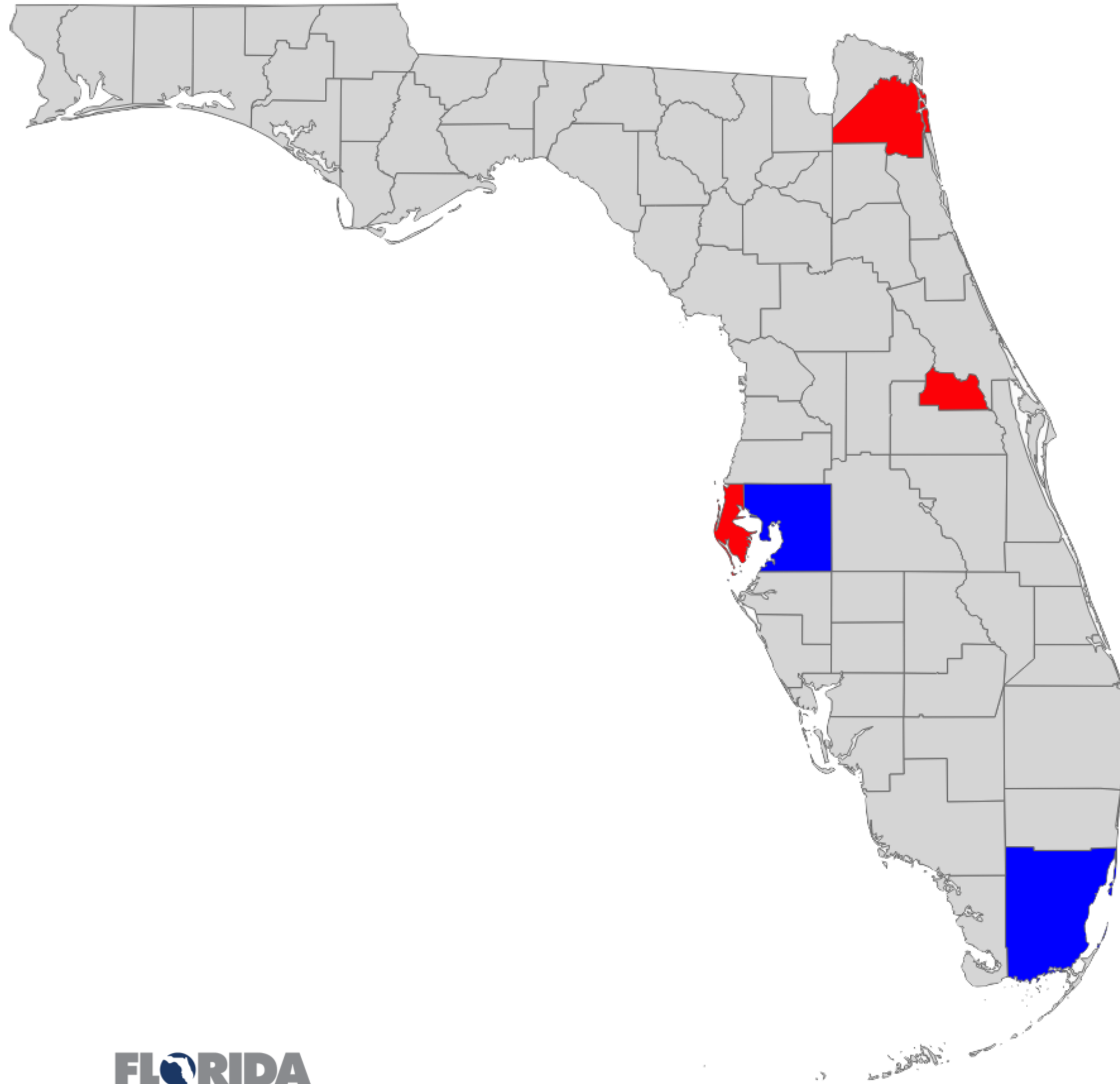
AP

Race Tightening: Florida Presidential Polling

Polling Data						
Poll	Date	Sample	MoE	Biden (D)	Trump (R)	Spread
RCP Average	8/28 - 9/13	--	--	48.7	47.1	Biden +1.6
Florida Atlantic University	9/11 - 9/12	631 RV	3.8	50	50	Tie
Monmouth*	9/10 - 9/13	428 LV	4.7	50	45	Biden +5
St. Pete Polls	9/7 - 9/8	2689 LV	1.9	50	47	Biden +3
CNBC/Change Research (D)	9/4 - 9/6	LV	--	49	46	Biden +3
NBC News/Marist	8/31 - 9/6	766 LV	4.5	48	48	Tie
Trafalgar Group (R)*	9/1 - 9/3	1022 LV	3.0	46	49	Trump +3
Quinnipiac	8/28 - 9/1	1235 LV	2.8	48	45	Biden +3



Turning to November – Counties to Watch



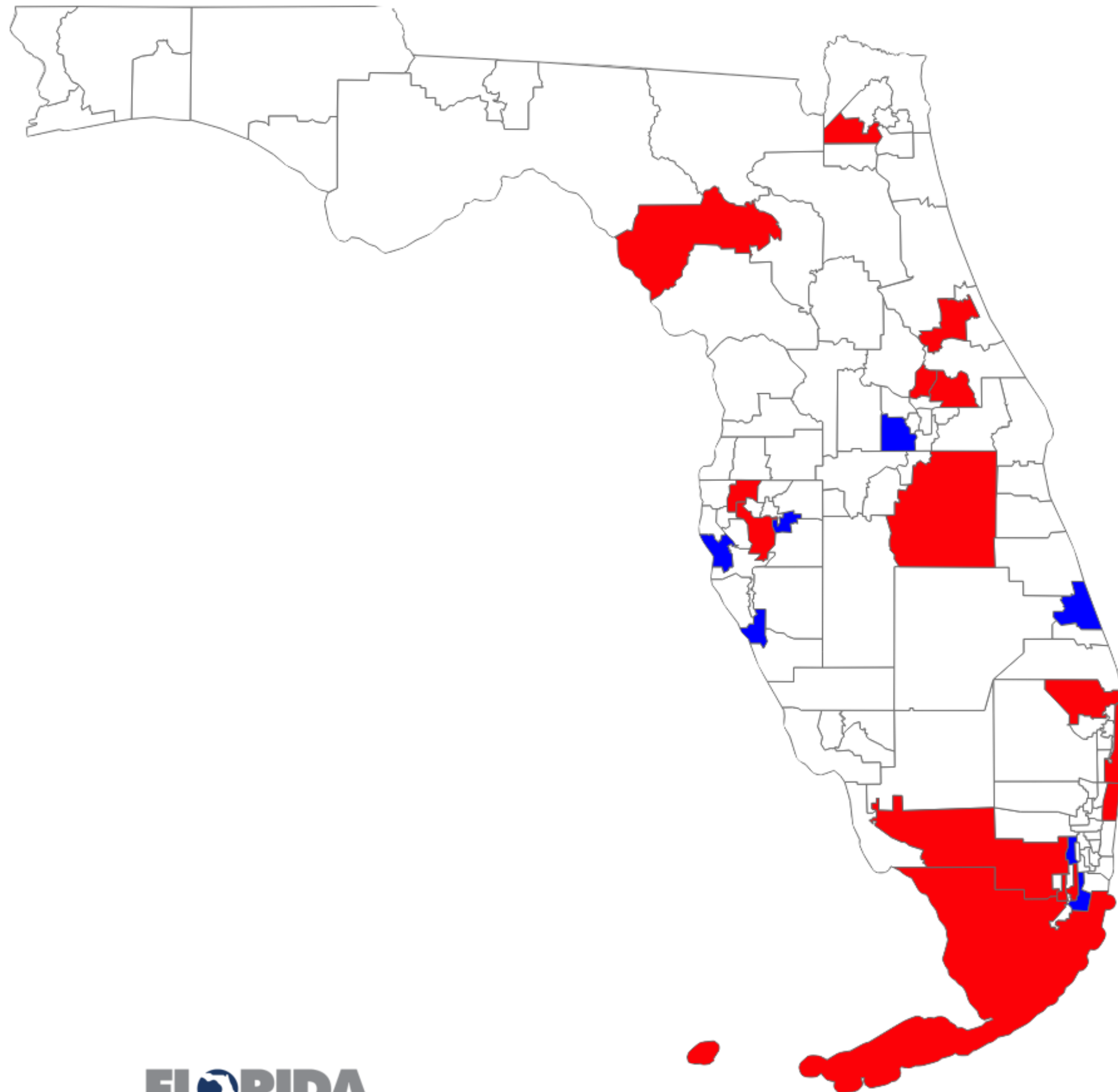
Seminole and Duval: Two historically Republican counties that have become closely-fought battlegrounds in recent years. President Trump won both by less than 2% in the 2016 general election, now Biden and Democrats hope to turn these counties Democratic Blue in November.

Pinellas: Pinellas has been the quintessential swing county in Florida elections for years. President Trump won the county by just 1 percentage point over Hillary Clinton in the 2016 general. The candidate who wins Pinellas in Presidential races has won Florida in 9 of the last 10 general elections.

Hillsborough: A county that has moved into the Democratic column in recent elections, the suburban Tampa communities of the county will be a highly-contested part of Florida as Biden hopes to make gains with suburbanites and Trump looks to hold their support.

Miami-Dade: Florida's largest county by registration, it was won by a margin of 30 percent by Hillary Clinton in 2016, President Trump hopes that improved support among Hispanic voters will help him significantly narrow this deficit in Miami-Dade this November.

Turning to November – Key House Races



The Rematches: Reps. Fetterhoff (R) and Caruso (R) are facing the same opponents they defeated by fewer than 100 votes in 2018.

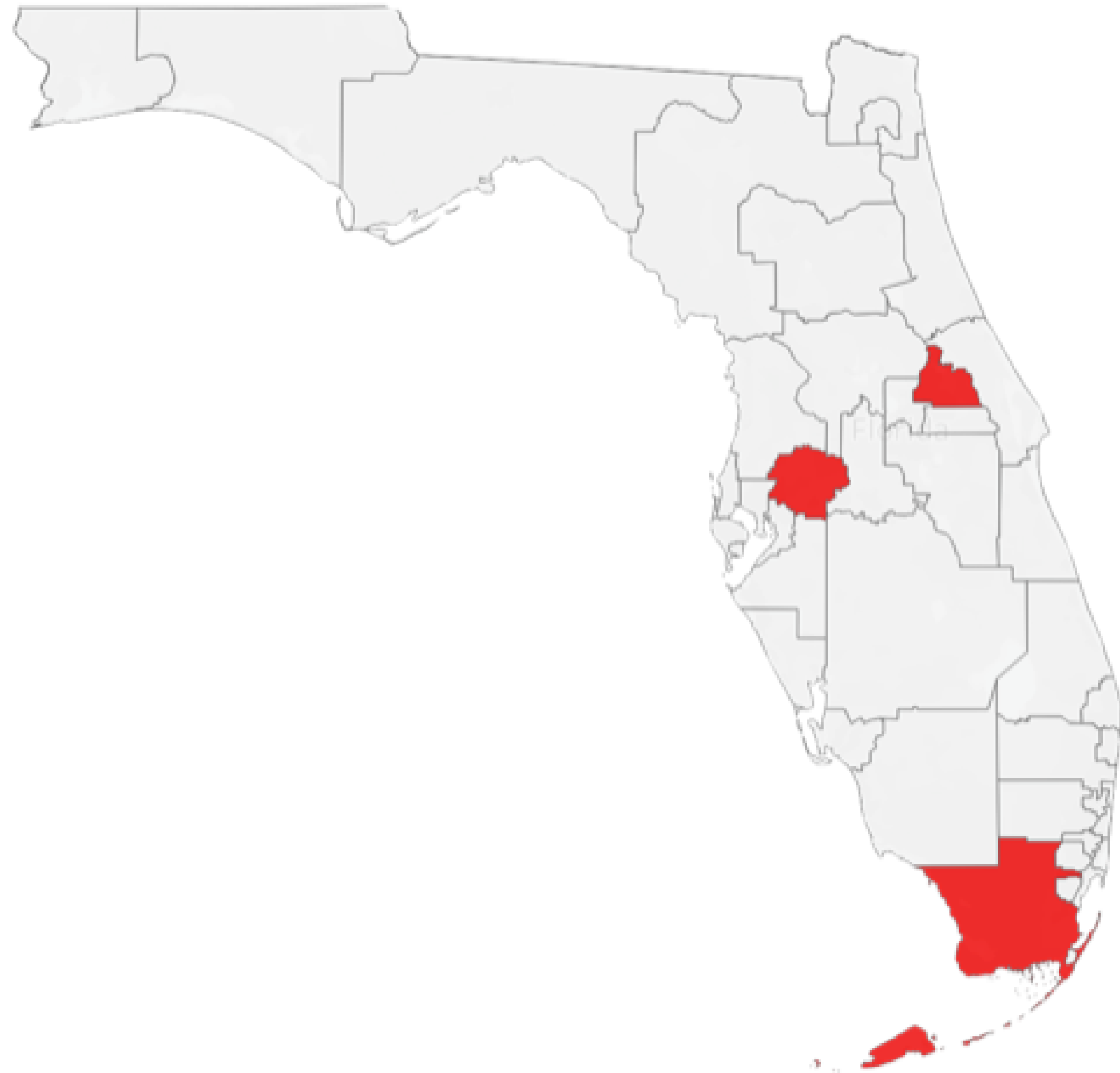
Seminole County: A fast-changing county politically saw Reps. Smith (R) and Plakon (R) face close contests in 2018.

Republicans in Democratic Seats: Rep. Chuck Clemons (R) and nominee Fred Hawkins (R) try to hold seats for the Republican caucus with Democratic registration advantages.

Freshman Democrats: Republicans look to reclaim lost ground in the 7 seats Democrats gained in the 2018 election cycle.

Miami races: Will the Presidential contest play a role in some of the closely contested seats in Miami-Dade? Reps. Aloupis (R) and Anthony Rodriguez (R) face re-election bids in seats narrowly won in 2018.

Turning to November – Key Senate Races



SD 9: *Jason Brodeur (R) vs Patricia Sigman (D)*

Democrats targeting this predominantly-Seminole County district that has been trended toward Democrats in recent years to replace Sen. David Simmons (R).

SD 20: *Danny Burgess (R) vs Kathy Lewis (D)*

A special election following the resignation of Sen. Tom Lee (R), a district that leans Republican but Democrats hope to make competitive.

SD 39: *Ana Maria Rodriguez (R) vs Javier Fernandez (D)*

A key swing district of Florida as both parties recruit top candidates to replace Sen. Anitere Flores (R).

Constitutional Amendments

Amendment Number and Name	Amendment Summary	Florida Chamber Position
Amendment 1 Citizenship Required to Vote in Florida Elections	This amendment provides that only United States Citizens who are at least eighteen years of age, a permanent resident of Florida, and registered to vote, as provided by law, shall be qualified to vote in a Florida election.	No Position
Amendment 2 Raising Florida’s Minimum Wage	Raises minimum wage to \$10.00 per hour effective September 30th, 2021. Each September 30th thereafter, minimum wage shall increase by \$1.00 per hour until the minimum wage reaches \$15.00 per hour on September 30th, 2026. From that point forward, future minimum wage increases shall revert to being adjusted annually for inflation starting September 30th, 2027.	Oppose
Amendment 3 All Voters Vote in Primary Elections for State Legislature, Governor and Cabinet	Allows all registered voters to vote in primaries for state legislature, governor, and cabinet regardless of political party affiliation. All candidates for an office, including party nominated candidates, appear on the same primary ballot. Two highest vote getters advance to general election. If only two candidates qualify, no primary is held and winner is determined in general election. Candidate’s party affiliation may appear on ballot as provided by law. Effective January 1, 2024.	Oppose

Constitutional Amendments

Amendment Number and Name	Amendment Summary	Florida Chamber Position
Amendment 4 Voter Approval of Constitutional Amendments	Requires all proposed amendments or revisions to the state constitution to be approved by the voters in two elections, instead of one, in order to take effect. The proposal applies the current thresholds for passage to each of the two elections.	Support
Amendment 5 Limitation on Homestead	Proposing an amendment to the State Constitution, effective date January 1, 2021, to increase, from 2 years to 3 years, the period of time during which accrued Save-Our-Homes benefits may be transferred from a prior homestead to a new homestead.	No Position
Amendment 6 Ad Valorem Tax Discount for Spouses of Certain Deceased Veterans Who Had Permanent, Combat-Related Disabilities	Provides that the homestead property tax discount for certain veterans with permanent combat-related disabilities carries over to such veteran's surviving spouse who holds legal or beneficial title to, and who permanently resides on, the homestead property, until he or she remarries or sells or otherwise disposes of the property. The discount may be transferred to a new homestead property of the surviving spouse under certain conditions. The amendment takes effect January 1, 2021.	No Position

VII. Why the Florida Chamber
Believes Amendment 2
(\$15 Minimum Wage Mandate)
Is Bad for Florida



Florida's Economy Drives the Nation



A GDP larger than all but 16 countries in the world and the 4th largest in the USA.



Florida's GDP is more than \$1,100,000,000,000 and still growing, adding \$2 billion per day.



Florida is the fastest growing state in the South and the 3rd fastest in the nation.



Florida is responsible for more than 1 of every 11 new jobs created nationwide.

Amendment 2:

“Amendment 2 is bad for Florida and worse for Floridians.”

What is Amendment 2?

- Amendment 2 will be on the 2020 November ballot
- It was paid for by the world's largest personal injury trial lawyer firm
- Mandates the statewide minimum wage increase to \$15/hr and beyond
- **Only** statewide mandated \$15/hr wage embedded in a state constitution
- Requires 60% approval for passage
- If this passes, in just a few years, forced cost-of-living adjustments means that Florida will have the **highest minimum wage in the nation**

"The amendment would raise the minimum wage to \$10 per hour beginning Sept. 30, 2021, and increase it an additional dollar each year until it reached \$15 in 2026. After that, future increases would be adjusted annually for inflation."

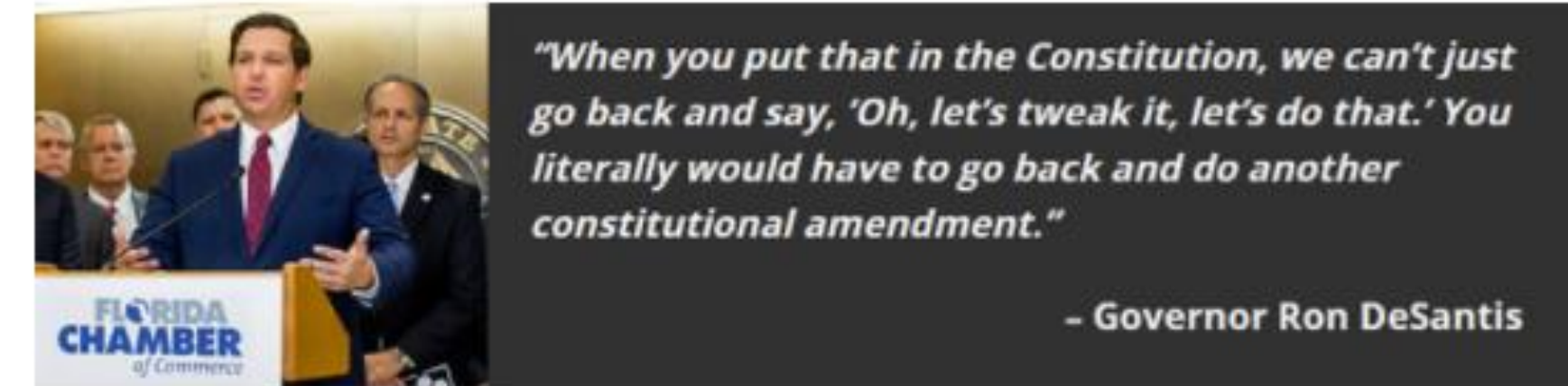
Orlando Sentinel



Amendment 2: Bad for Florida, Worse for Floridians



No State Has Ever Passed a Constitutional Mandate Raising Minimum Wage to \$15 Per Hour



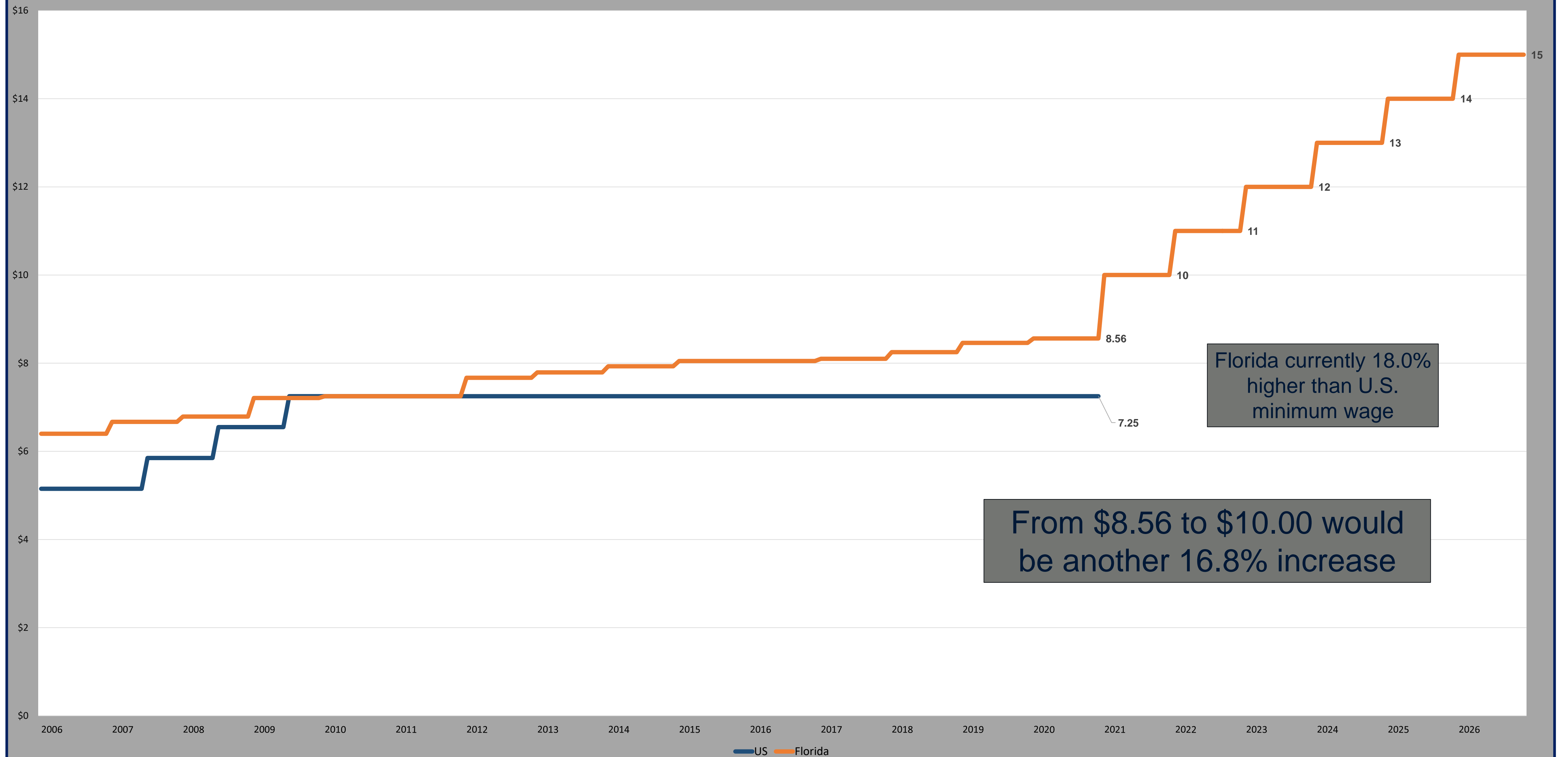
*COVID-19 shuttered businesses and increased unemployment....
Now is not the time to Raise Florida's Minimum Wage*



Download Our Tool Kit

Join the Fight Against the Job-Killing \$15 Minimum Wage Mandate
Download our Social Media Toolkit and Sign our Petition to Get Involved
www.flchamber.com/minimumwage

Florida and U.S. Minimum Wage – plus proposed increases



How Amendment 2 Would Put the Brakes on Florida's Economy

Economic Studies Find:

- An increase in teen unemployment and fewer teens in the workforce.
- Entry level, training and part-time workers will see a dramatic reduction in paid work hours.
- Businesses move certain functions to neighboring states for experienced labor at a more competitive rate.
- Rapid expansion of work automation which shrinks the labor force which leads to job losses and layoffs.
- Minimum wages set a minimum productivity requirement that hurts young people, part-time employees, minorities, elderly workers and disabled workers.
- Will cost the taxpayers more than \$700 million annually in lost revenue and a \$4.7 billion increase in social service expenditures.
- A minimum wage increase negatively impacts those on fixed incomes by driving up inflation and dramatically increasing the cost of living and goods.

"...Florida Chamber of Commerce President **Mark Wilson** offered cautions. Specifically [he] called out the constitutional amendment heading for the ballot this year that would ask voters to mandate increases in the minimum wage to eventually \$15 an hour."

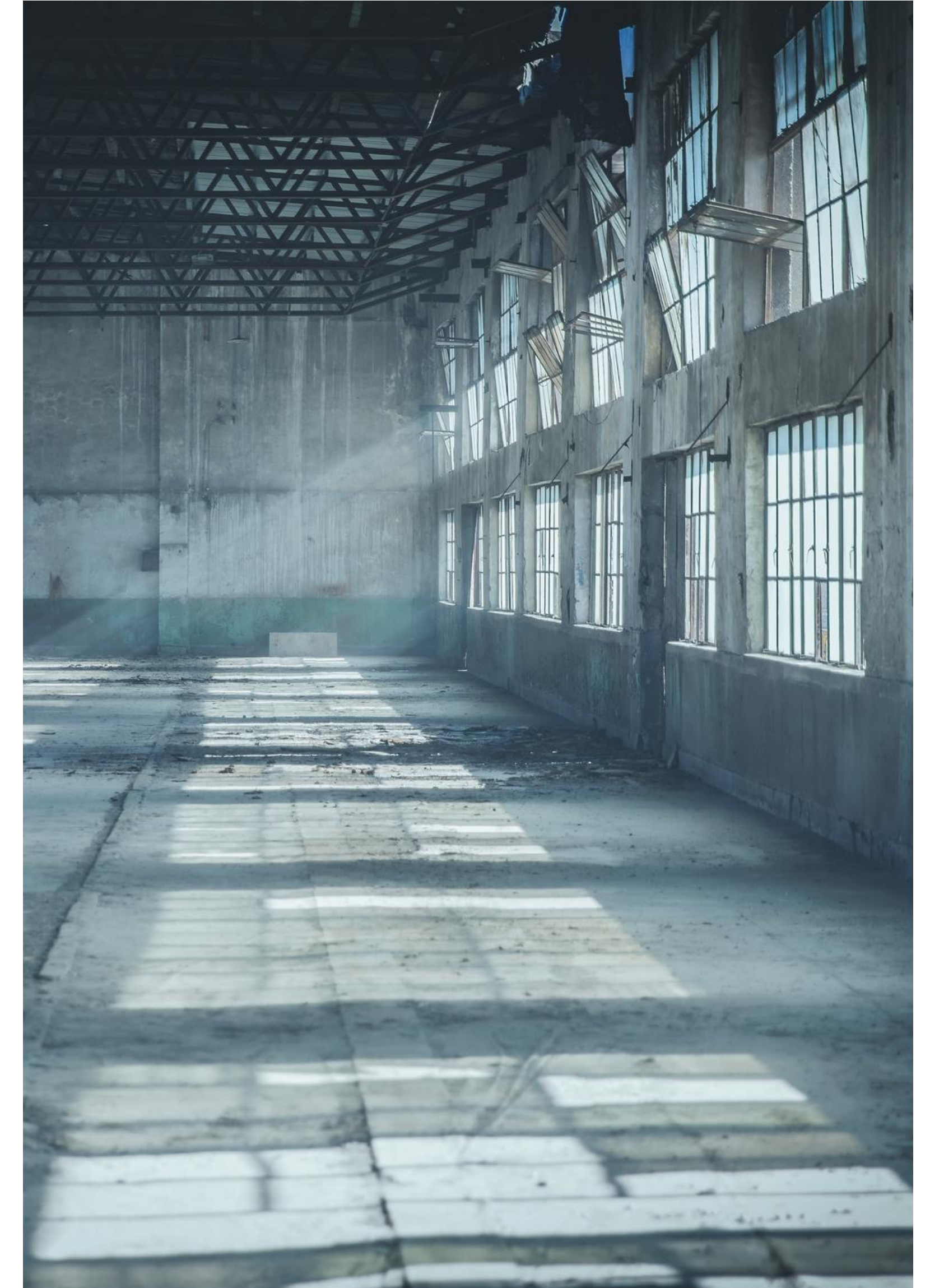
1/9/2020 **FLAPOL**



www.FLChamber.com/minimumwage

\$15 Minimum Wage is too risky for Florida

Impacted Industries	Statewide Employment	% of Workforce
Retail Trade	1,139,400	12.6%
Hotel, Food Services	1,017,100	11.0%
15-19 year olds	1,194,200	6.0%
Total	3,350,700	29.6%



Join Other Chamber's of Commerce United Against Amendment 2

Anna Maria Island Chamber of Commerce
Citrus County Chamber of Commerce
Estero Chamber of Commerce
Greater Fort Myers Chamber of Commerce
Greater Palm Harbor Chamber of Commerce
Greater Sarasota Chamber of Commerce
Islamorada Chamber of Commerce
Lakeland Chamber of Commerce
Manatee Chamber of Commerce
Niceville Valparaiso Chamber of Commerce
Palm Beach North Chamber of Commerce
Stuart/Martin County Chamber of Commerce
Tavares Chamber of Commerce
Ybor City Chamber of Commerce

Business Voice of East Central Florida
Destin Chamber of Commerce
Greater Boca Raton Chamber of Commerce
Greater Gainesville Chamber of Commerce
Greater Pasco Chamber of Commerce
Indian River Chamber of Commerce
Jackson County Chamber of Commerce
Main Street DeFuniak Springs
Miramar Pembroke Pines Regional Chamber of Commerce
Northeast Polk Chamber of Commerce
South Lake Chamber of Commerce
Tampa Bay Beaches Chamber of Commerce
West Orange Chamber of Commerce

Help Us Keep Mandates Out of the Constitution

[www.FLChamber.com/
minimumwage](http://www.FLChamber.com/minimumwage)



VIII. Back to School and Childcare Issues Update

Governor DeSantis' School Reopening and CARES Act Plan

Reopening Florida's Schools and the CARES Act

Closing Achievement Gaps and
Creating Safe Spaces for Learning



FLORIDA DEPARTMENT OF
EDUCATION
fldoe.org

Contact **Matthew Choy** for questions at mchoy@flchamber.com

Department of Education – Back to School Numbers

- 64 out of 67 counties are currently offering in-person instruction
- About 1,300,000 Students are already at their desks
- Excluding Broward, Miami-Dade and Palm Beach, all other counties report approx 62% children are taking advantage of in-person instruction
- 1.6M of the 2.8M total k-12 student population decided to return to traditional classroom learning. Approx 60%.
- 65 districts report 95-100% of teacher are showing up for work

Department of Education – Back to School Numbers

- **Percentage of children under 18 with married parents, both parents working: 64.2%**
- **Percentage of children under 6 with married parents, both parents working; 59.8%**

Data Source: U.S. Bureau of Labor Statistics as of 2018-19

IX. Open Discussion and Q&A



**FLORIDA
CHAMBER**
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RELAUNCH FLORIDA

Uniting Business for Good

Florida Chamber Federation Monthly Update

September 22, 2020

mwilson@flchamber.com

**FLORIDA
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