



Florida's Future: Don't Blink

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

Mark Wilson, President, Florida Chamber of Commerce

FLORIDA
CHAMBER
of Commerce

From 2008-2016 Lake Ray earned:

- An average Florida Chamber Report Card Grade of **99 percent**
- 6 Distinguished Advocate Awards
- 5 perfect "A" grades



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

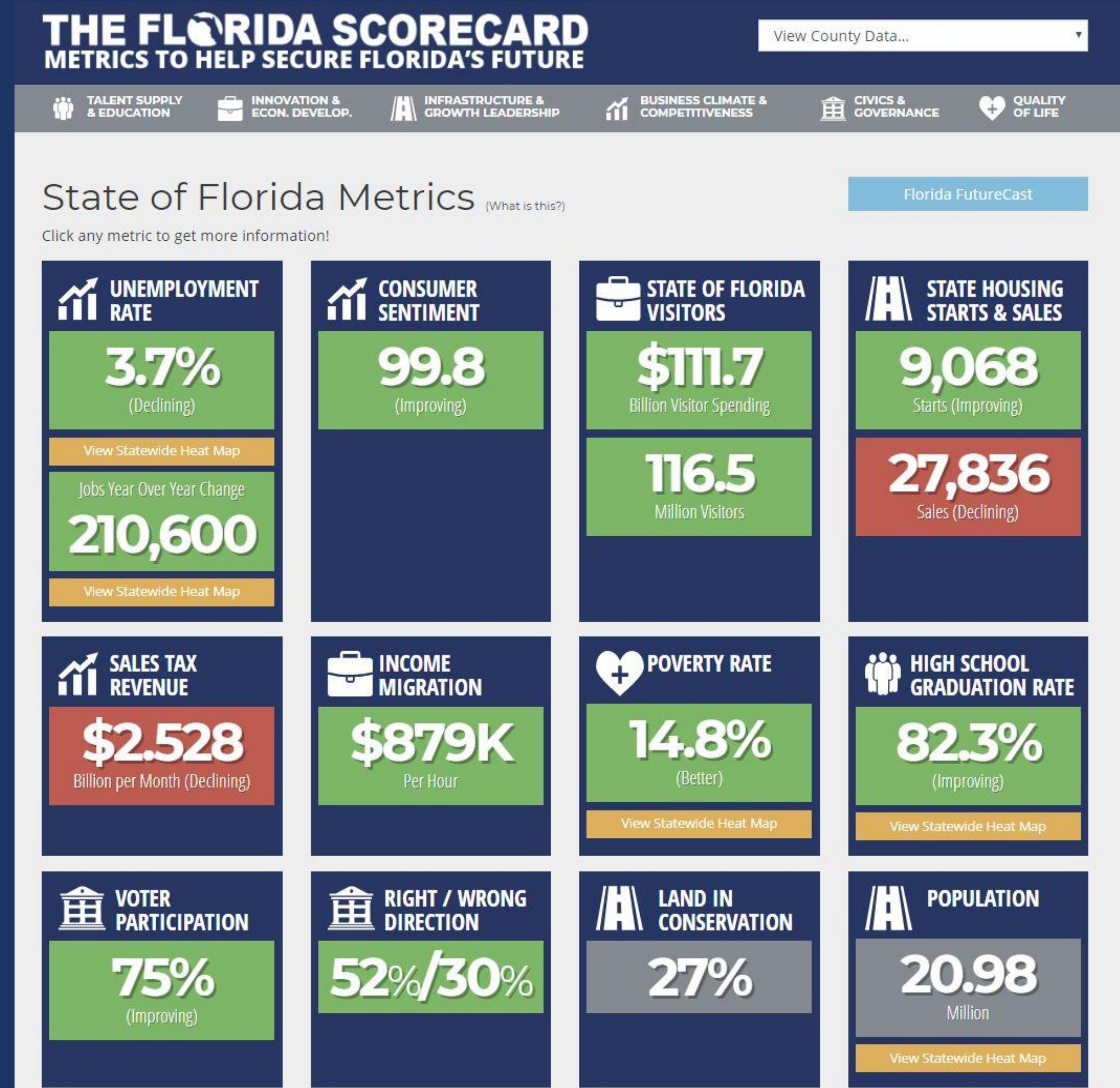
Unifying Florida's Business Community



“The Florida Chamber is showing up day after day and making sure the right things happen in Florida.” – Governor Rick Scott

You Can't Manage What You Don't Measure

- Florida's Economy surpasses \$1 Trillion
- 238,900 open jobs/ 383,000 people looking for jobs
- Florida creates more than 1 out of every 14 jobs in the U.S.
- 116.5 Million Visitors in 2017





UNEMPLOYMENT RATE

3.7%

(Declining)

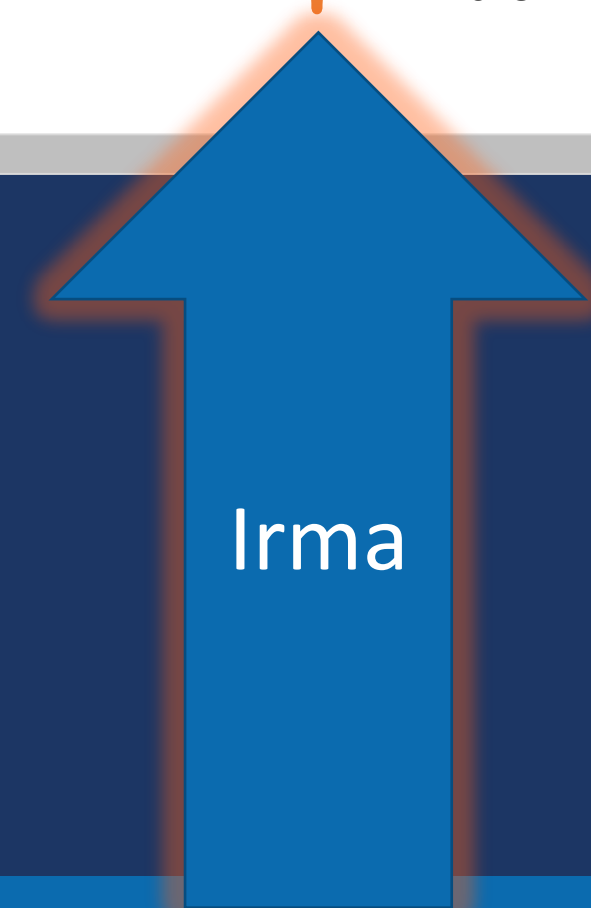
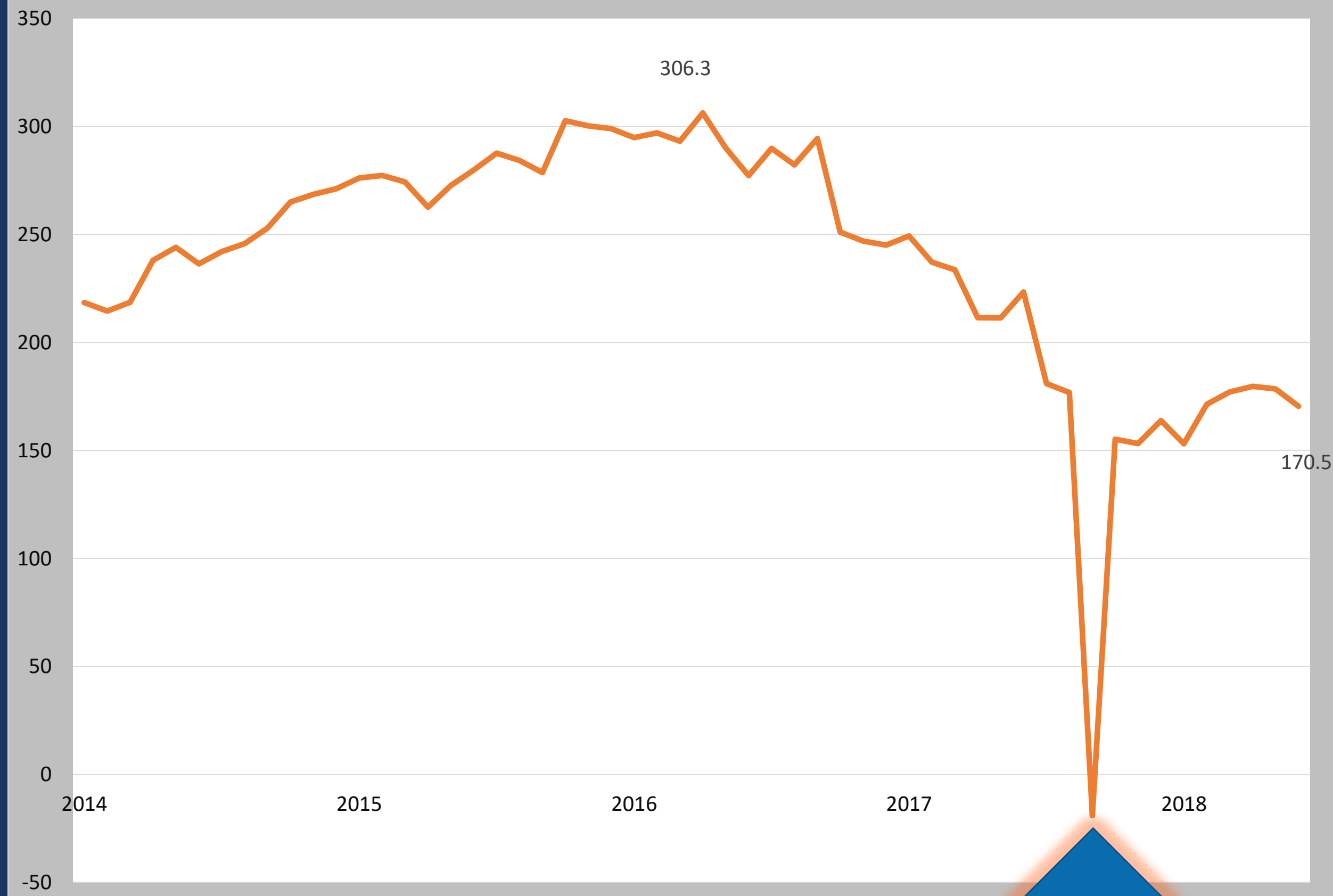
[View Statewide Heat Map](#)

Jobs Year Over Year Change

210,600

[View Statewide Heat Map](#)

Year-over-Year Job Creation Thousands



Job Creation

July 2017 through July 2018

Florida Growth Rate: 2.5%

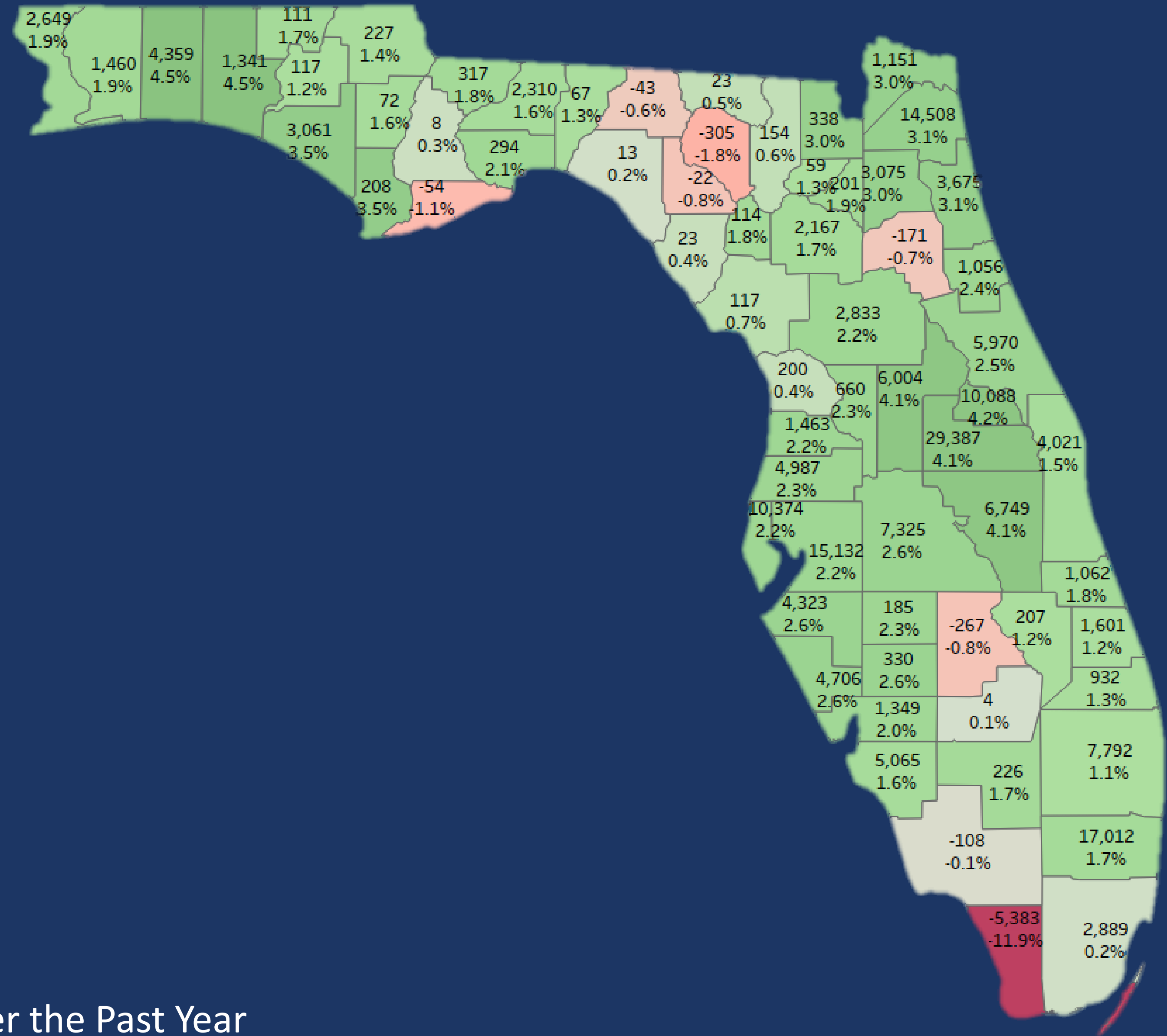
U.S. Growth Rate: 1.6%

Top Counties – Job Numbers

1. Orange 29,387
2. Broward 17,012
3. Hillsborough 15,132

Top Percentage Growth

- | | | |
|-----|---|------------------|
| Tie | { | 1. Okaloosa 4.5% |
| | | 1. Walton 4.5% |
| | | 3. Seminole 4.2% |
| Tie | { | 4. Orange 4.1% |
| | | 4. Lake 4.1% |
| | | 4. Osceola 4.1% |



8 Florida Counties Lost Jobs Over the Past Year

Industry	Jobs Created	Growth Rate
Construction	38,200	7.5%
Leisure & Hospitality	50,400	4.2%
Manufacturing	15,000	4.1%
Financial Activities	16,300	2.9%
Education and Healthcare	33,700	2.6%
Professional & Business Services	28,500	2.1%
Trade, Transportation & Utilities	21,700	1.2%

Move more trade through Florida sea and air gateways

Make, grow, and refine more products for export in Florida

Multiply the impacts of trade in Florida



FLORIDA: MADE FOR TRADE

Florida Trade and Logistics Study 2.0



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SECURING FLORIDA'S FUTURE
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Manufacturing Jobs by County

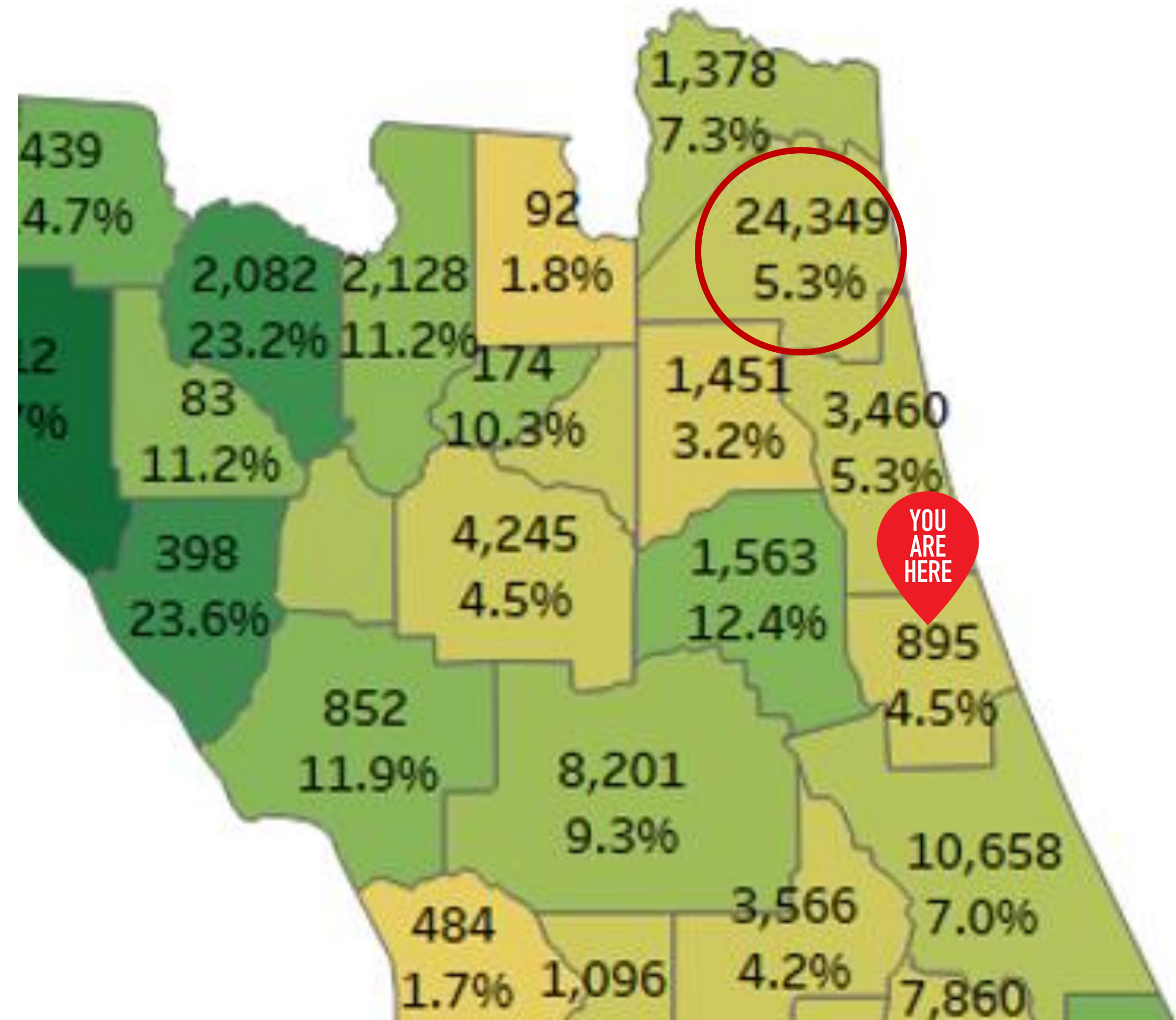
Top Counties:

1. Miami-Dade	41,056
2. Orange	32,108
3. Pinellas	31,910
4. Hillsborough	28,051
5. Broward	27,198

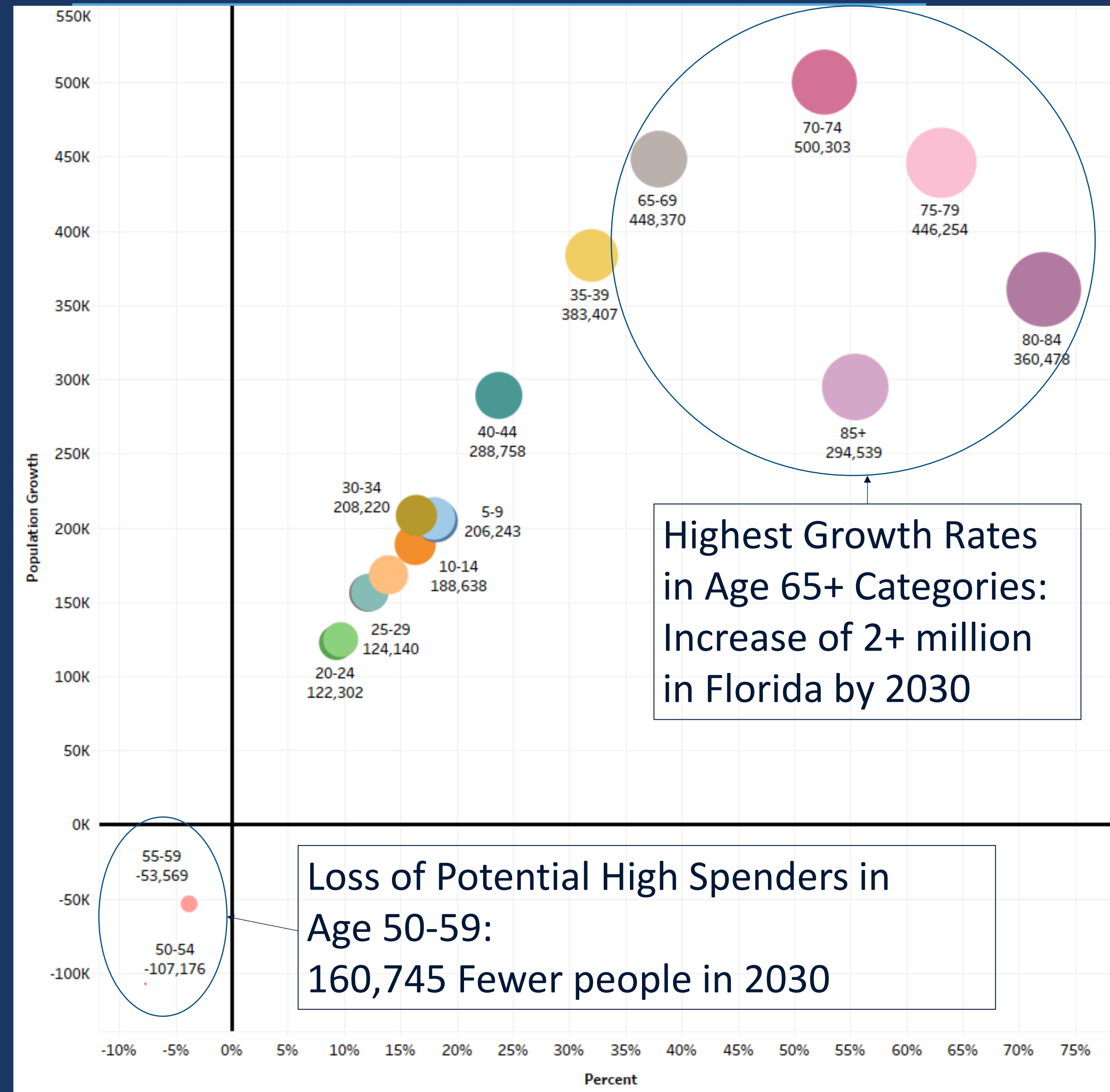
Top Percentage of Jobs

1. Taylor	32.7%
2. Liberty	29.7%
3. Dixie	23.6%
4. Suwannee	23.2%
5. Madison	14.7%

Data Source: Quarterly Census of Employment and Wages.



Population Changes by Age Group 2016-2030



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**.



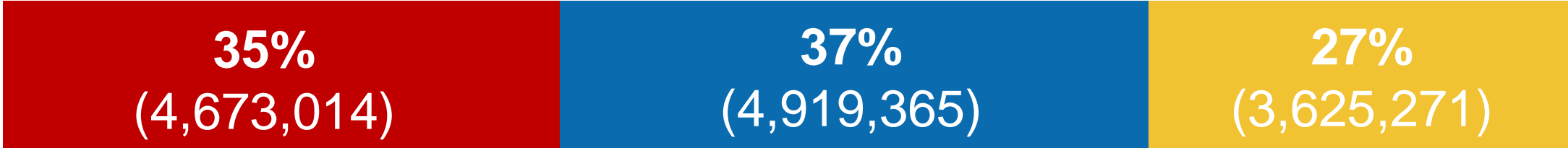
National Politics – Are President Trump and/or Congress a tailwind or headwind?



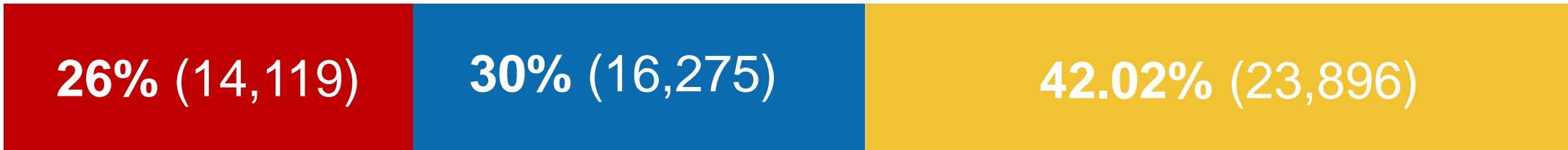
Proliferation of “**paid**” and “**fake**” news creating uncertainty.

Registration Comparisons Over Time

Total State



This Month



Year to Date



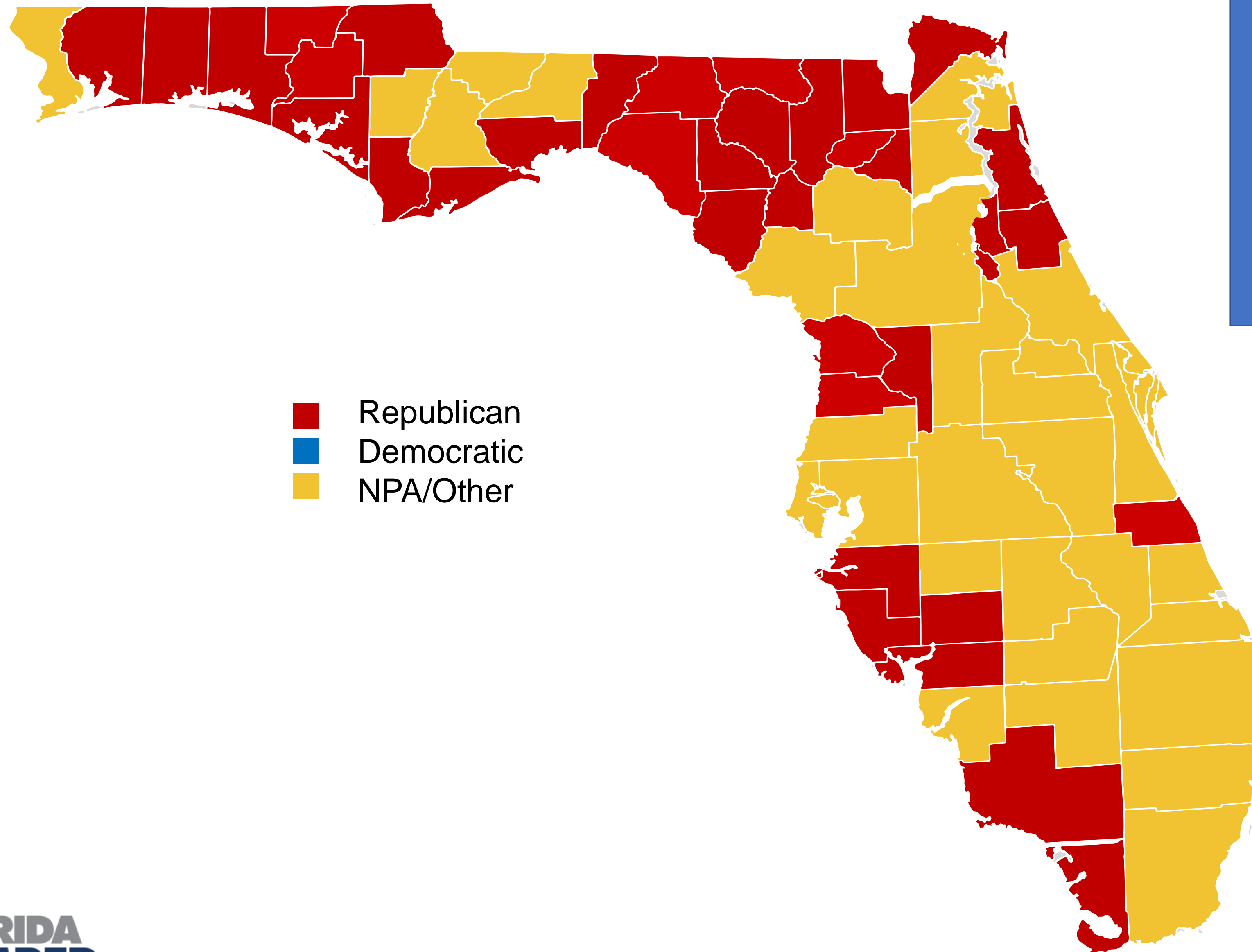
Since Last Election



819,468 New Registered Voters since 2016 election

- Republican
- Democratic
- NPA/Other

JULY NEW VOTERS
By County



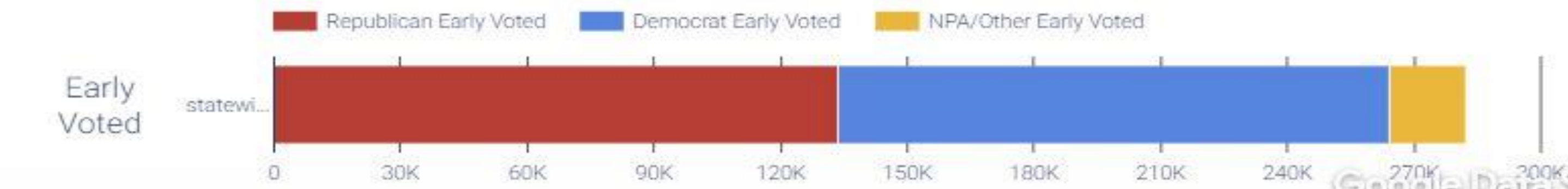
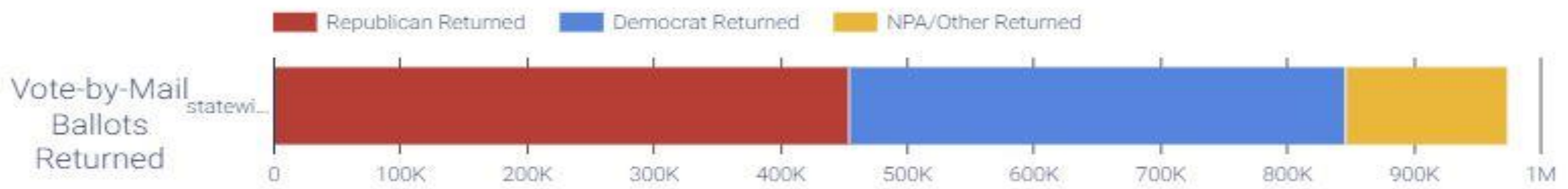
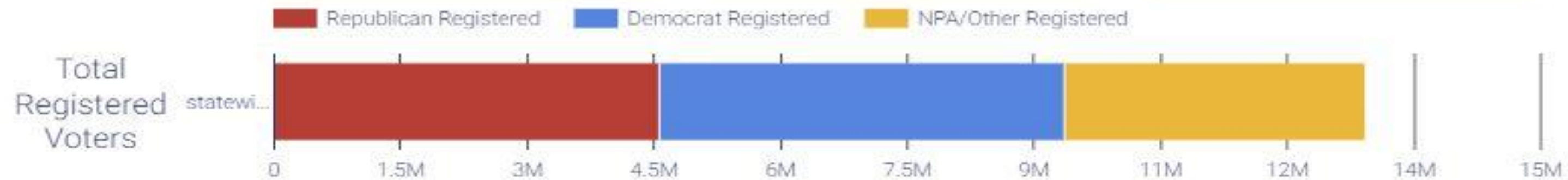
54,290 # of NEWLY registered voters

NPA- 31 Counties
Rep- 36 Counties
Dem- 0 Counties

Voting Methods Are Changing



2018 Primary EAV: Statewide



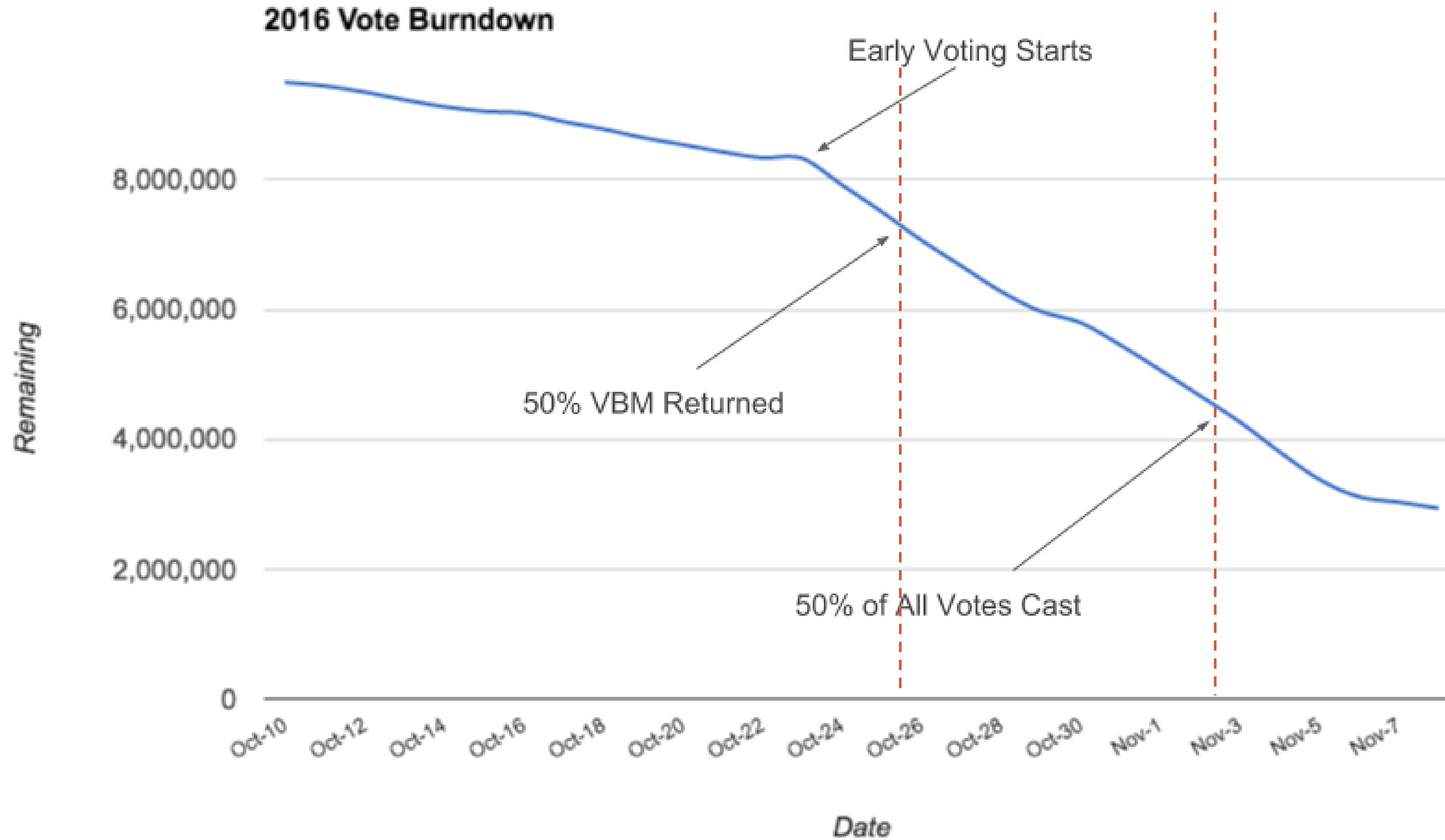
Google Data Studio

As of 8/22/18



www.FIChamber.com/Dashboard

Voting Method
Why It Matters



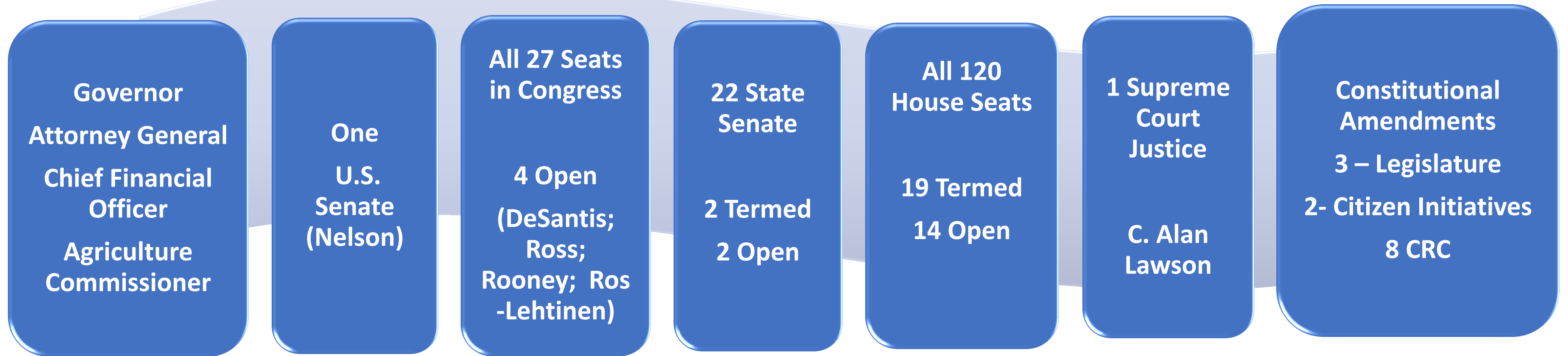
Changing Voter Attitudes

Statewide	JOBS	HC	ED	OTHER
	14	13	17	Global Warming 5% Immigration 5% Property Insurance 3%
Jacksonville	6	12	14	Crime and Drugs 6%
Gainesville	6	18	24	Global Warming 6%
Tallahassee	5	29	19	Senior Issues 10%
Panama City	21	25	21	Global Warming 7%
Pensacola	24	15	6	Immigration 6%
Orlando/Daytona	12	12	15	Global Warming 8%
Tampa/St. Pete	21	9	21	Global Warming 6%
Ft. Myers/Naples	22	9	16	Water Issues 6%
Broward/Miami	15	13	16	Property Insurance 7%
Palm Beach	2	14	24	Property Insurance 8%

Statewide	56:27
Jacksonville	69:20
Gainesville	41:29
Tallahassee	48:33
Panama City	64:21
Pensacola	68:12
Orlando/Daytona	59:25
Tampa/St. Pete	59:23
Ft. Myers/Naples	56:28
Broward/Miami	36:45
Palm Beach	52:32


Statewide	56:27
Men	61:23
Women	50:31
Republicans	76:11
Democrats	33:45
Others	56:26
White	60:25
Af. American	34:38
Hispanic	50:36

What's At Stake in Florida in the 2018 Election



Constitutional Amendments

- Constitution Revision Commission: Eight proposals made it to the final ballot.
- Paid Petition Initiatives:
 - Voter Approval of Casino Gambling
 - Restoration of voting rights for those with prior felony convictions
- Legislative Initiatives
 - Homestead Exemption
 - Cap on non-homestead assessments
 - 2/3rds to raise taxes/fees by Legislature

CONSTITUTION REVISION COMMISSION Final Proposals for the 2018 Ballot				
P 6001 Rights of Crime Victims; Judges	P 6002 Military and First Responder Survivor Benefits; Higher Education	P 6003 School Board Term Limits and Duties; Public Schools	P 6004 Prohibits Offshore Oil and Gas Drilling; Prohibits Vaping in Enclosed Indoor Workplaces	
<ul style="list-style-type: none"> • Adds certain constitutional rights to crime victims • Changes the standards of certain administrative law cases • Moves the retirement ages of judges from 70 to 75. <p><i>(Formerly Proposals 96, 6, 41)</i></p>	<ul style="list-style-type: none"> • Offers certain benefits to the families of certain military and first responders who die in the line of duty • Increases the difficulty of raising public university fees or tuition • Places the state college system into the constitution <p><i>(Formerly Proposals 49, 44, 83)</i></p>	<ul style="list-style-type: none"> • Creates school board term limits of eight years • Limits the authority of school boards to those schools established by that board • Requires the promotion of civic literacy <p><i>(Formerly Proposals 42, 71, 10)</i></p>	<ul style="list-style-type: none"> • Places a constitutional ban on oil and gas drilling in specified coastal waters • Prohibits vaping in enclosed indoor workplaces <p><i>(Formerly Proposals 91, 65)</i></p>	
P 6005 State and Local Government Structure and Operation	P 6006 Property Rights; Removal of Obsolete Provisions;	P 6007 Lobbying and Abuse of Office by Public Officers	P 6012 Ends Dog Racing	
<ul style="list-style-type: none"> • Places the Department of Veterans' Affairs into the constitution • Establishes and places the Office of Domestic Security and Counterterrorism into the constitution • Adjusts certain elected constitutional officers of counties • Adjusts the start date of even-year legislative sessions <p><i>(Formerly Proposals 9, 26, 13, 103)</i></p>	<ul style="list-style-type: none"> • Removes the outdated alien land law provision from the constitution • Removes the high speed rail language from the constitution • Clarifies the applicability of repealed criminal statute <p><i>(Formerly Proposals 3, 12, 20)</i></p>	<ul style="list-style-type: none"> • Creates lobbying restrictions for certain elected officials and public employees <p><i>(Formerly Proposal 39)</i></p>	<ul style="list-style-type: none"> • Prohibits the racing of and wagering on dogs <p><i>(Formerly Proposal 67)</i></p>	

For more information, visit www.FloridaChamber.com/CRC.

Engage Your Employees



- For non-partisan materials
 - Issues
 - Elections
 - Voter Registration Drives
- Talk to your employees about paying attention
- Encourage them to get involved (non-partisan)

“Florida Wins is the best resource to go to, to understand both the politics of what’s happening in Florida and also the policy implications.” – Will Weatherford, Former Speaker of the Florida House



GET INVOLVED: UPCOMING EVENTS

- **August 28, 2018-** Florida Chamber of Commerce Infrastructure Coalition Webinar
- **September 4, 2018-** Global Florida Webinar
- **September 26-27, 2018-** Future of Florida Forum-Orlando, FL
- **December 3-7, 2018-** Florida Chamber of Commerce Business Development & Trade Mission to Ireland & UK
- **December 11, 2018-** Transportation & Infrastructure Summit-Babcock Ranch, FL
- **February 19-21, 2019-** Legislative Fly-In- Tallahassee, FL
- **April, 2019-** Florida International Trade & Investment Conference-Miami, FL

“We won’t get the policies right until we get the politics right.” – Will Weatherford, Partner, Weatherford Capital & Former Speaker of the House



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www.FIChamber.com/FCMA