



| State of the State

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

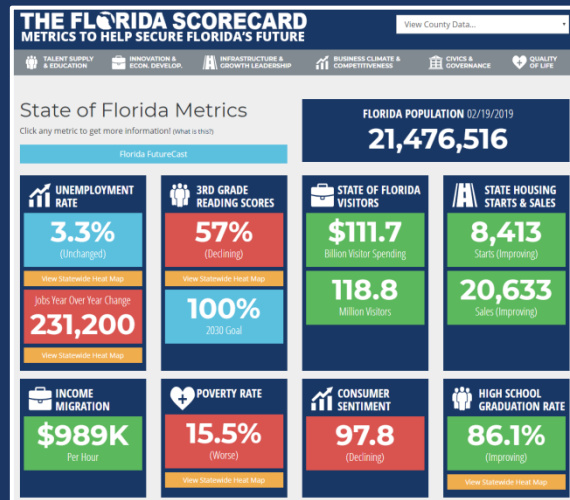
“Florida is changing. Our **ECONOMICS**, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson

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Unifying Florida's Business Community

**FLORIDA
CHAMBER**
Foundation

Solutions (Research)



**FLORIDA
CHAMBER**
of Commerce

Actions (Lobbying & Grassroots)



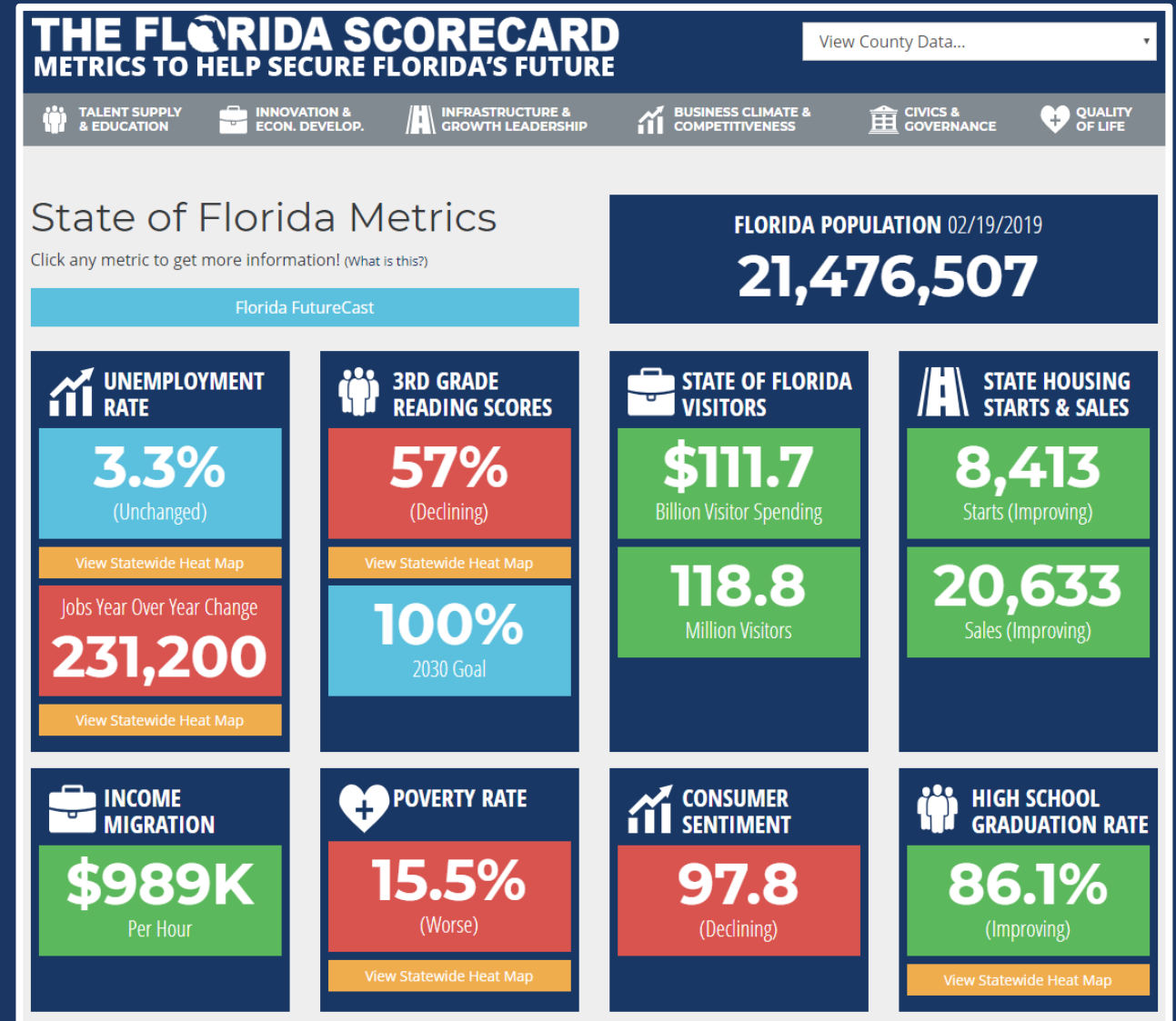
**FLORIDA
CHAMBER**
Political Institute

Leadership (Elections)



TheFloridaScorecard.org

- Florida's Economy \$1 Trillion GDP (17th largest in the world)
- 21.4 Million Residents (3rd / 26M by 2030 / around 900/day)
 - 1.7 million jobs needed
- 118.8 Million Visitors in 2017
- 3.3% Unemployment Rate
 - 273,700 jobs looking for people
 - 335,000 people looking for jobs





UNEMPLOYMENT RATE

3.3%
(Unchanged)

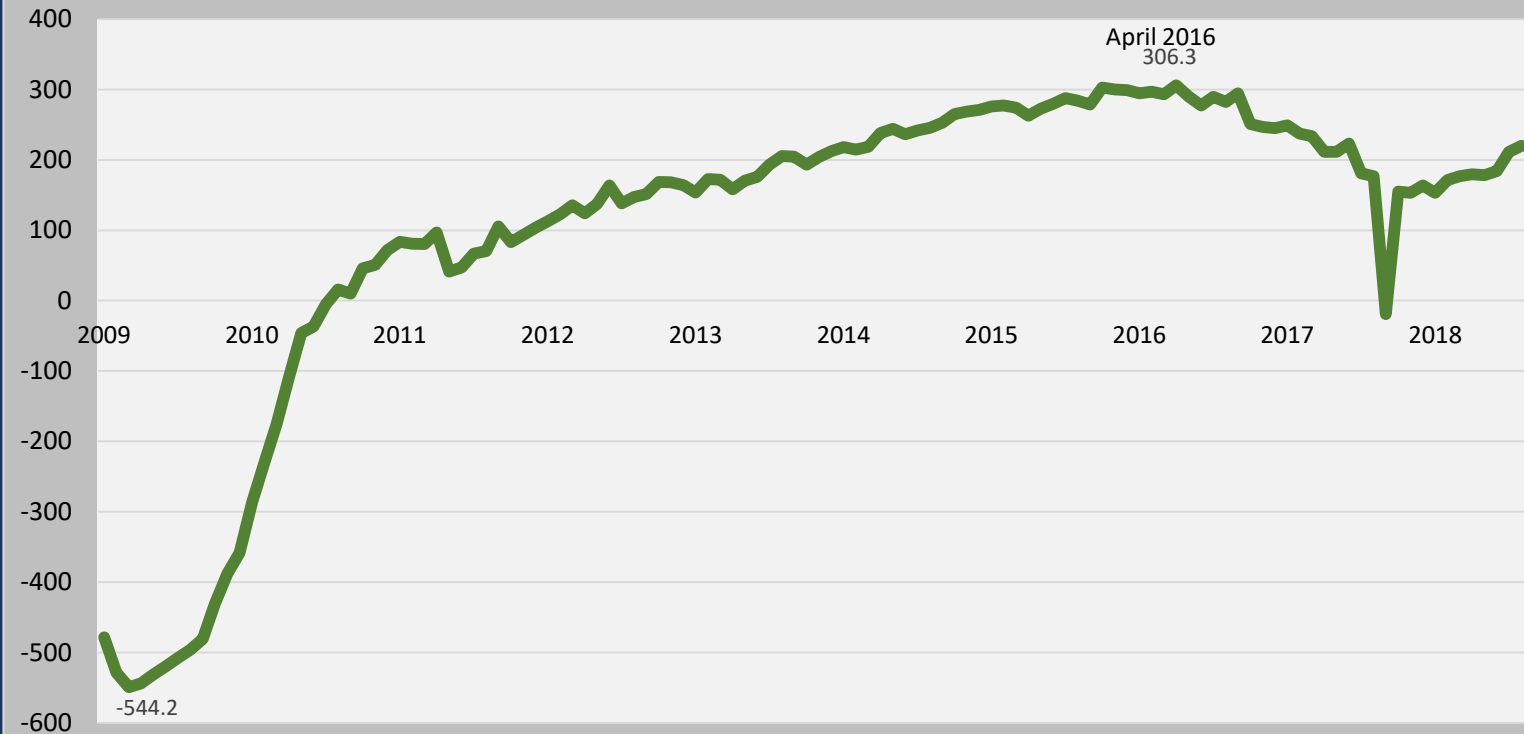
[View Statewide Heat Map](#)

Jobs Year Over Year
Change

231,200

[View Statewide Heat Map](#)

Year over Year Jobs Creation - Florida (thousands)



Job Creation By County

December 2017 to December 2018

Florida Job Creation Rate: 2.7%

U.S. Job Creation Rate: 1.8%

Top Counties for Jobs:

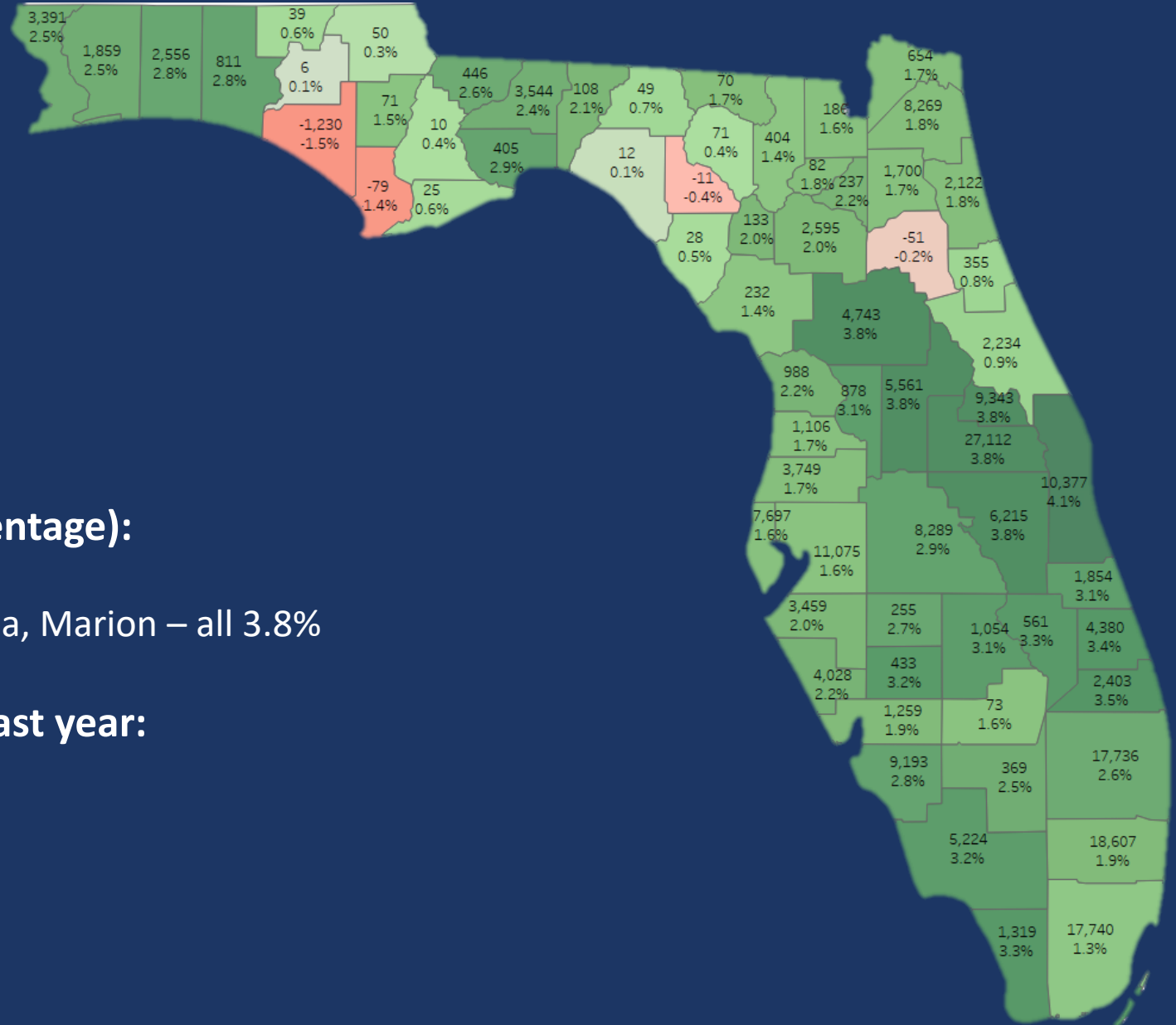
Orange	27,112
Broward	18,607
Miami-Dade	17,740

Fastest Growing Counties (by percentage):

1. Brevard 4.1%
2. (tie) Seminole, Orange, Lake, Osceola, Marion – all 3.8%

4 Florida Counties Lost Jobs over past year:

Bay County – 1,230
Gulf County – 79
Putnam - 51
Lafayette – 11



Job Creation By Industry

Industry	Job Gain	Percent Growth
Education & Health Services	54,000	4.2%
Leisure & Hospitality	45,800	3.7%
Professional & Business Services	39,300	2.9%
Construction	34,900	6.7%
Trade, Transportation & Utilities	21,500	1.2%
Financial Activities	19,300	3.4%
Manufacturing	12,700	3.5%

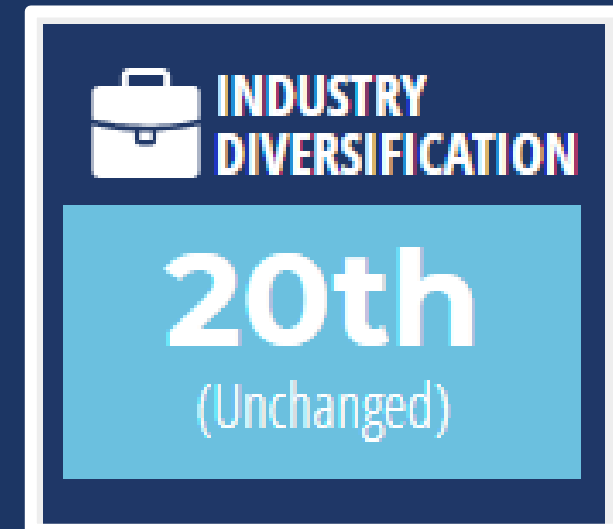
December 2017 – December 2018 Job Growth

Florida Continues to Diversify Its Economy

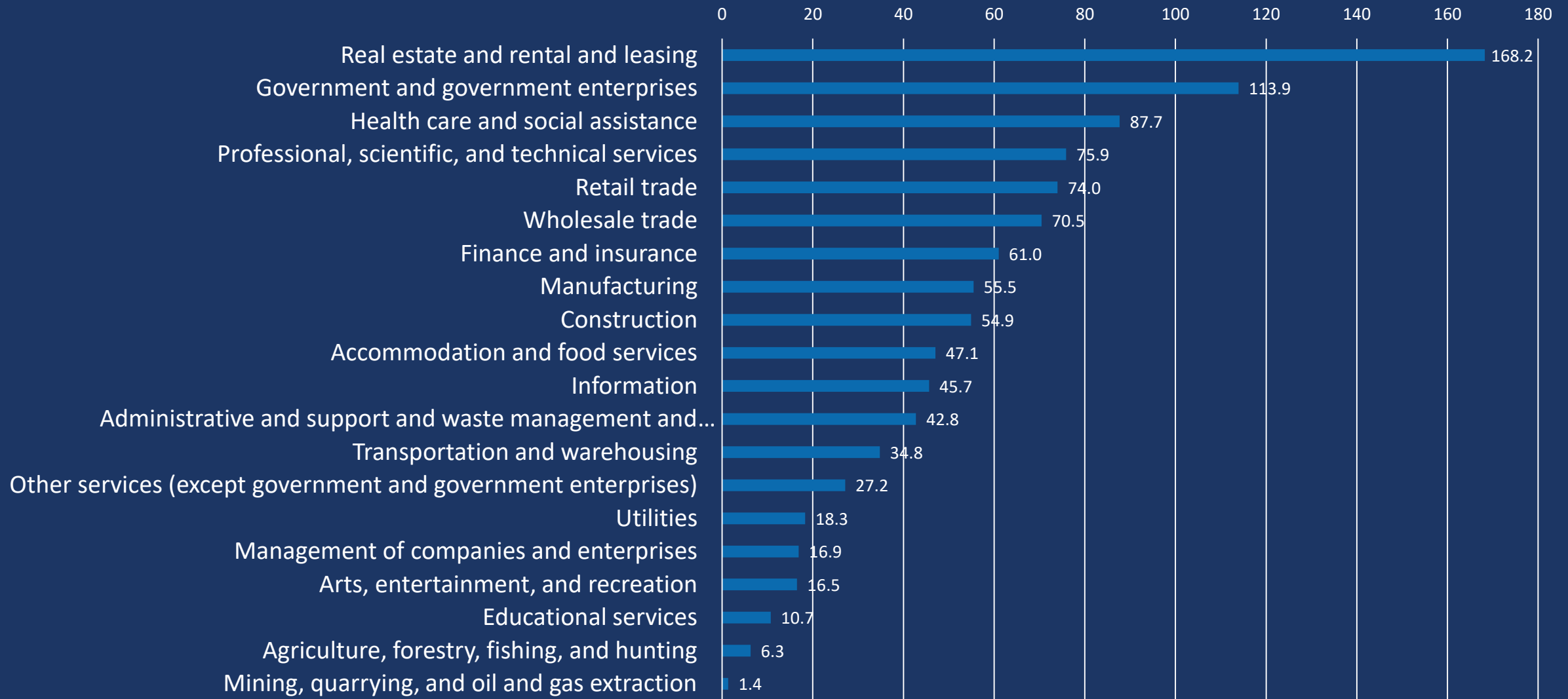
Last Year



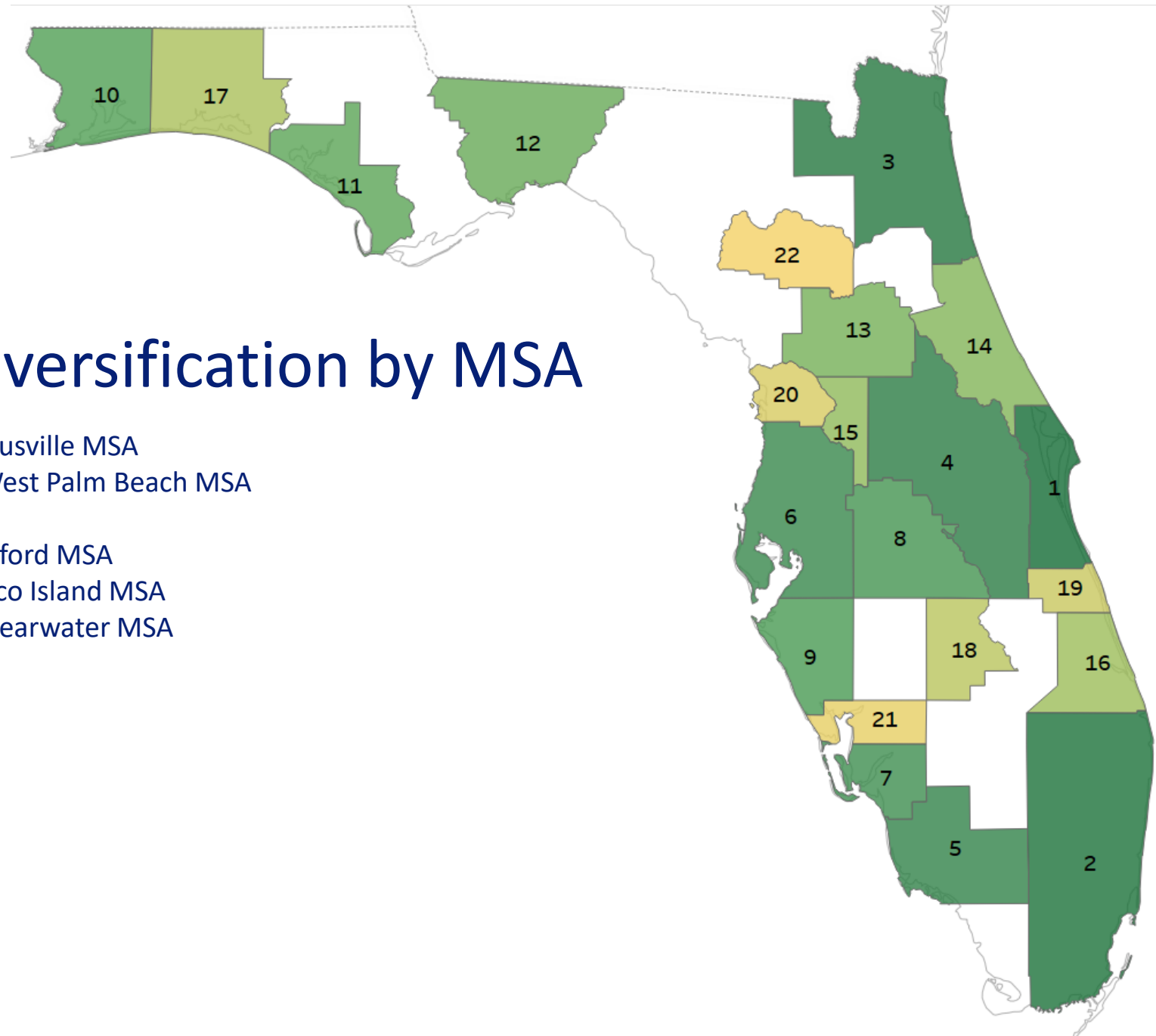
Florida - Current



GDP of Florida's Industries for Q2 2018



In billions of dollars



Florida Industry Diversification by MSA

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

Florida is #20 in the U.S.

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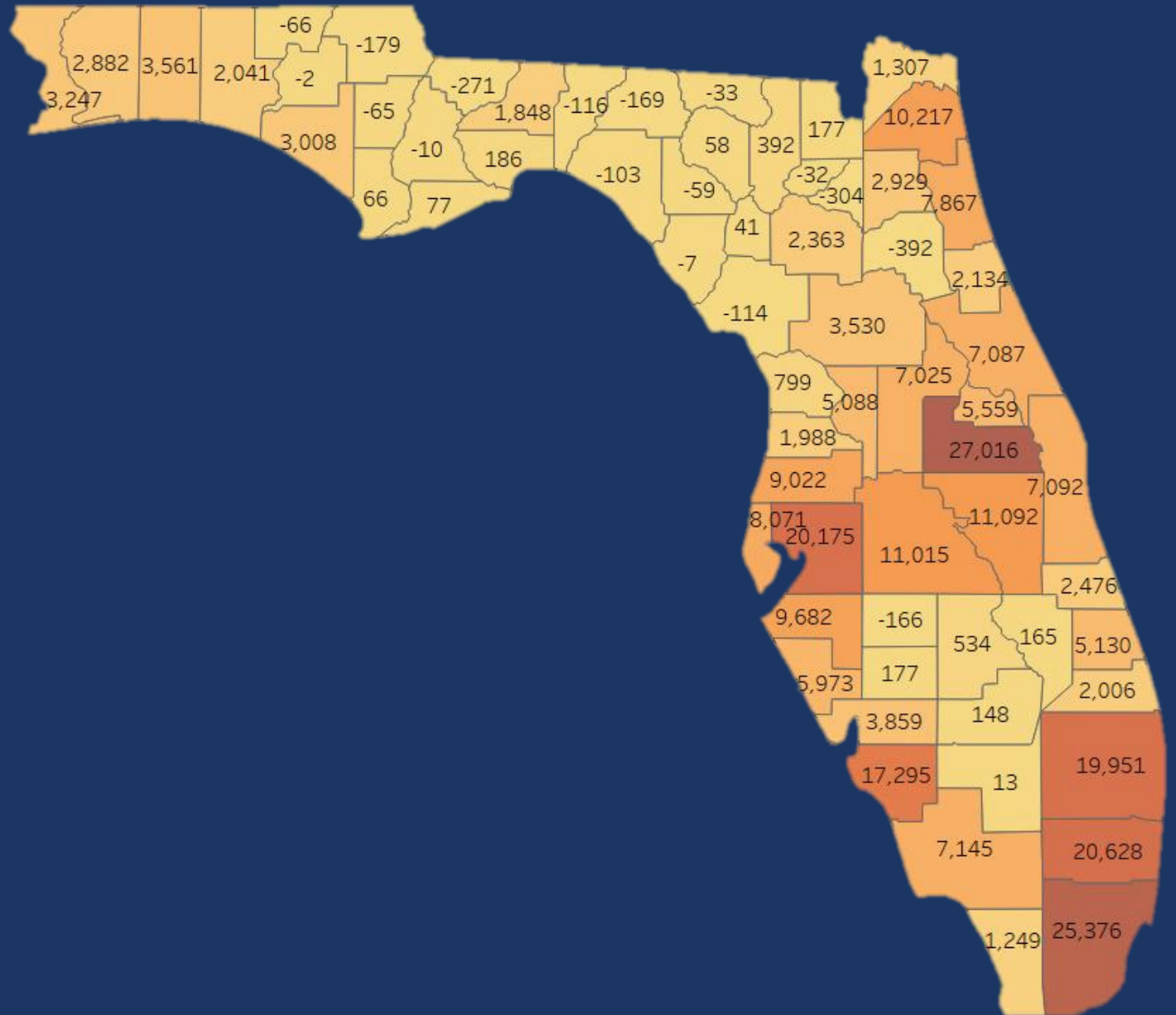
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Year-over-Year Population Changes

Most recent data

Top Counties:

Orange	27,016
Miami-Dade	25,376
Broward	20,628
Hillsborough	20,175
Palm Beach	19,951
Lee	17,295
Osceola	11,092
Polk	11,015
Duval	10,217
Manatee	9,682



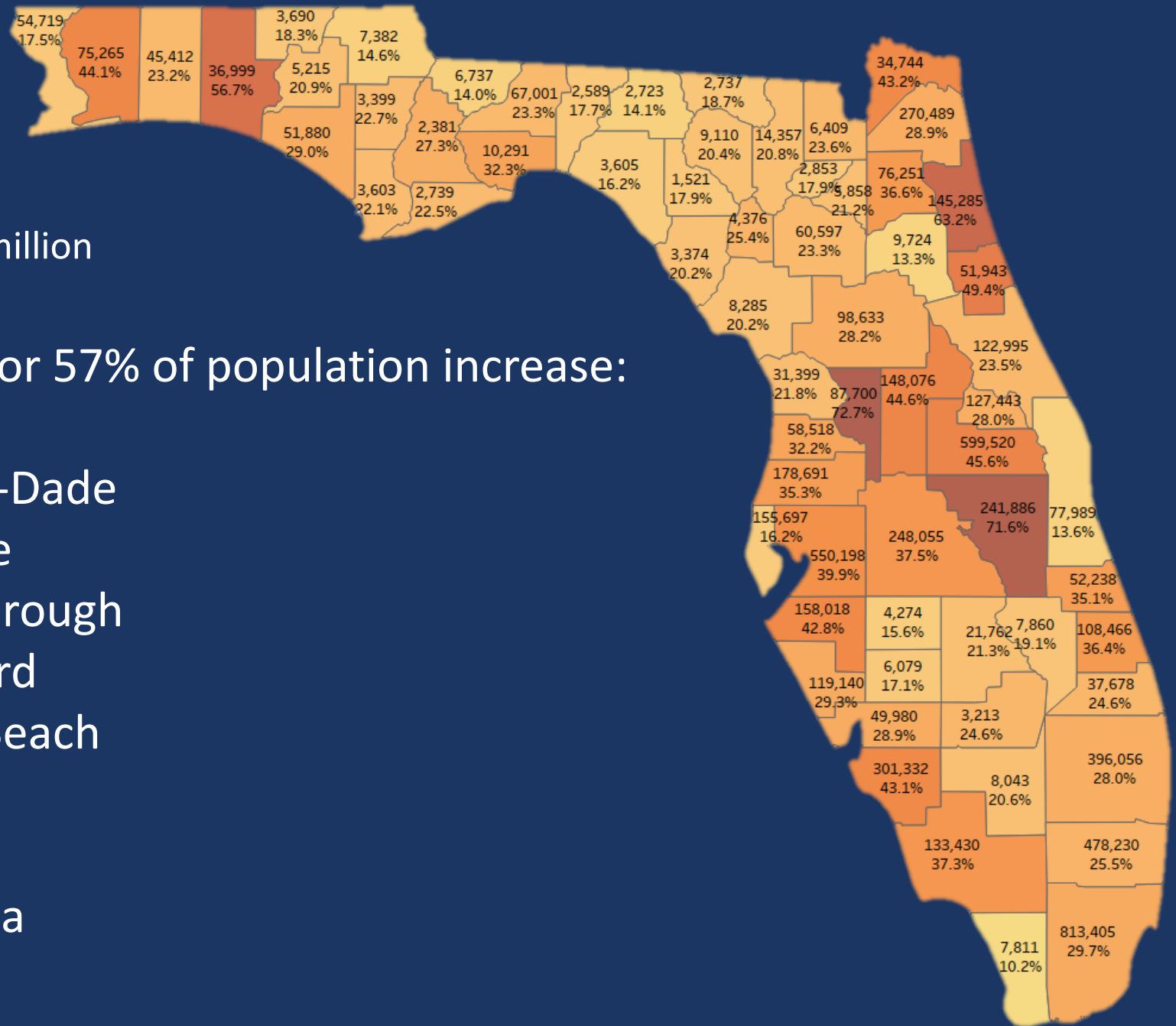
FLORIDA POPULATION 02/19/2019

21,476,507

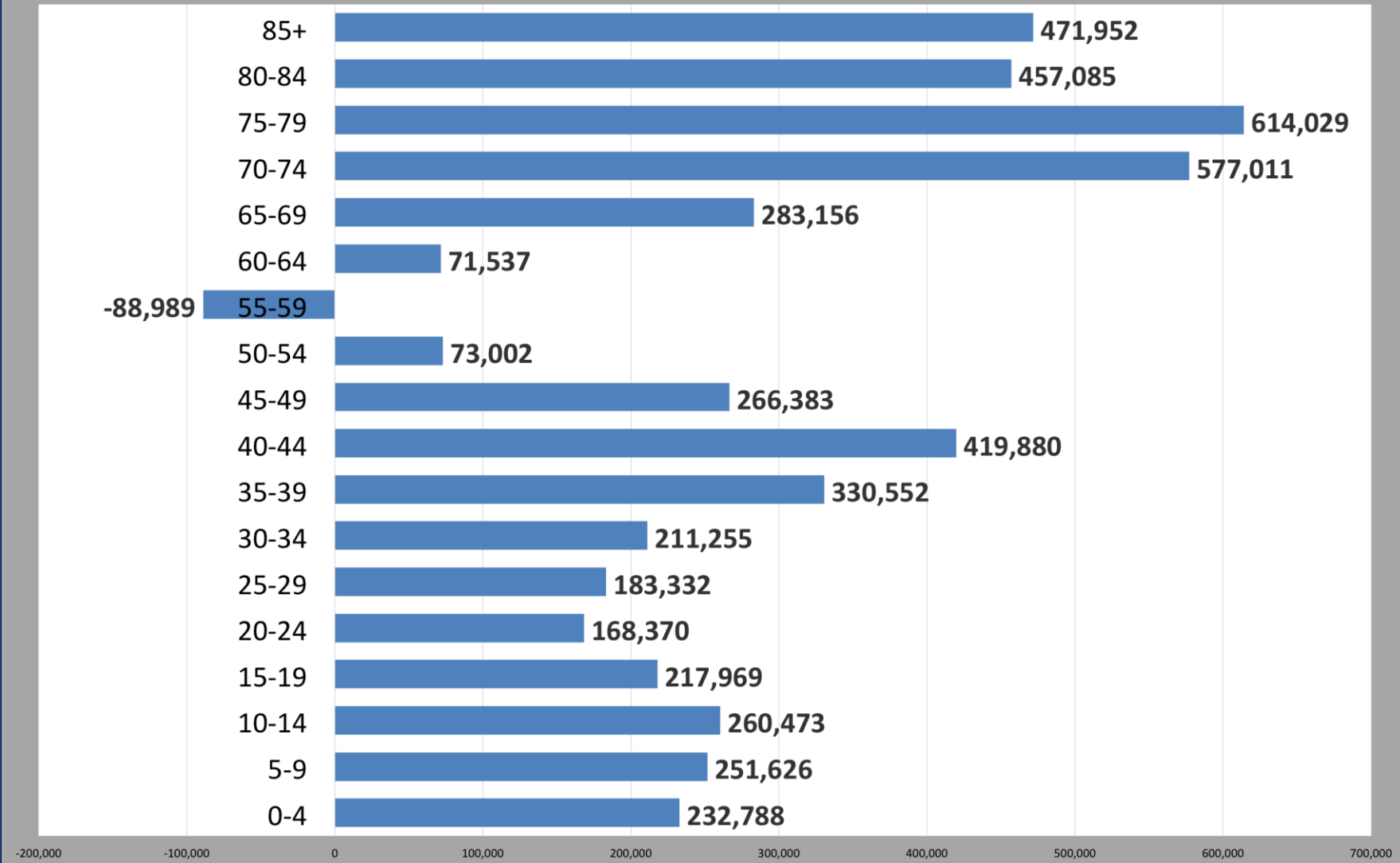
Projected population by 2030: 26 million

Eight counties will account for 57% of population increase:

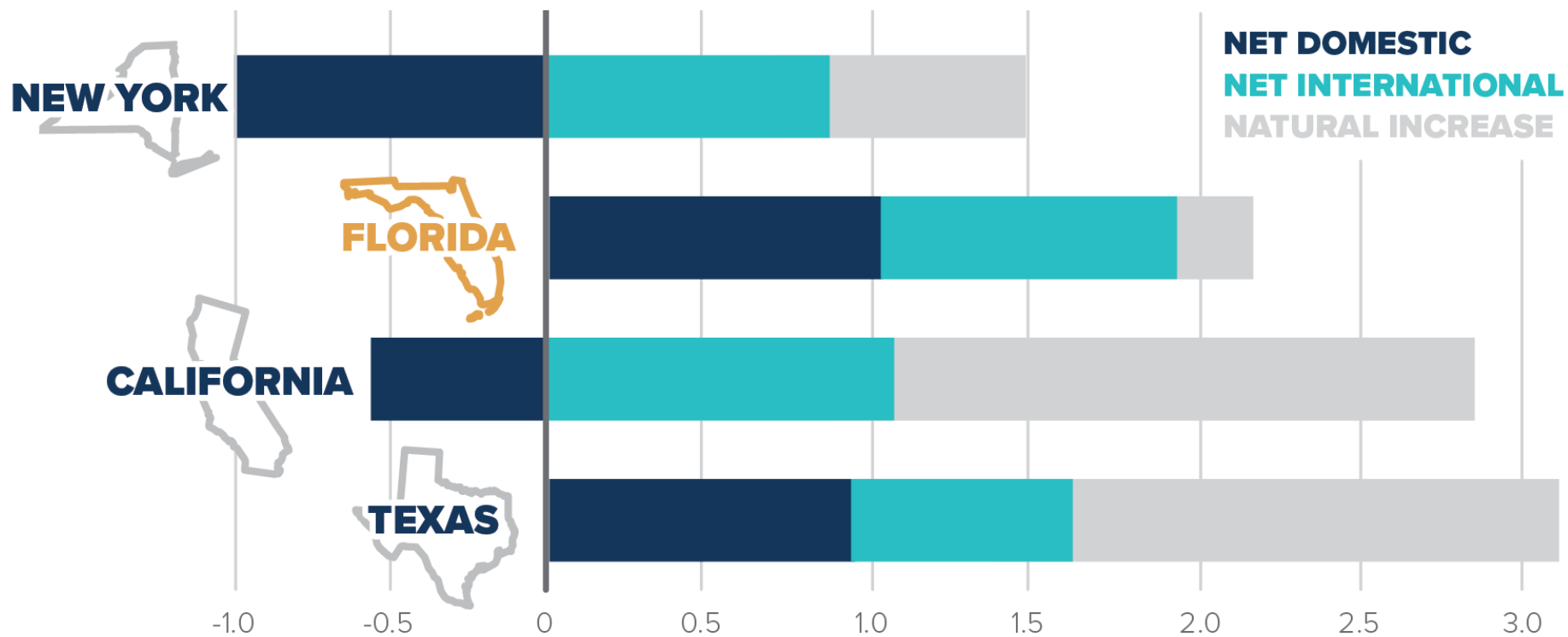
1. Miami-Dade
2. Orange
3. Hillsborough
4. Broward
5. Palm Beach
6. Lee
7. Duval
8. Osceola



Florida's Next 5 Million People by Age Group



Where Does Florida's Growth Come From?



Florida Wins, New York Loses

HOT AIR

New York Governor: Florida Is Stealing Our Population

JAZZ SHAW Posted at 6:41 pm on February 12, 2019

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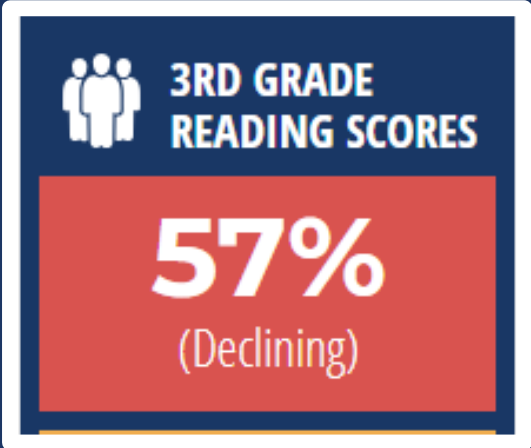
South Florida Luxury Condos Being Scooped Up By Relocating New Yorkers Looking To Save On Taxes

By David Sutta February 8, 2019 at 11:00 pm Filed Under: David Sutta, Local TV, Luxury Condominium, Real estate, Tax Reform

MIAMI (CBSMiami) – This week the Governor of New York blamed budget shortfalls on the state of Florida.

He said New Yorkers are fleeing to the sunshine state to save big time on taxes.

Florida's 2018 3rd Grade Reading Scores

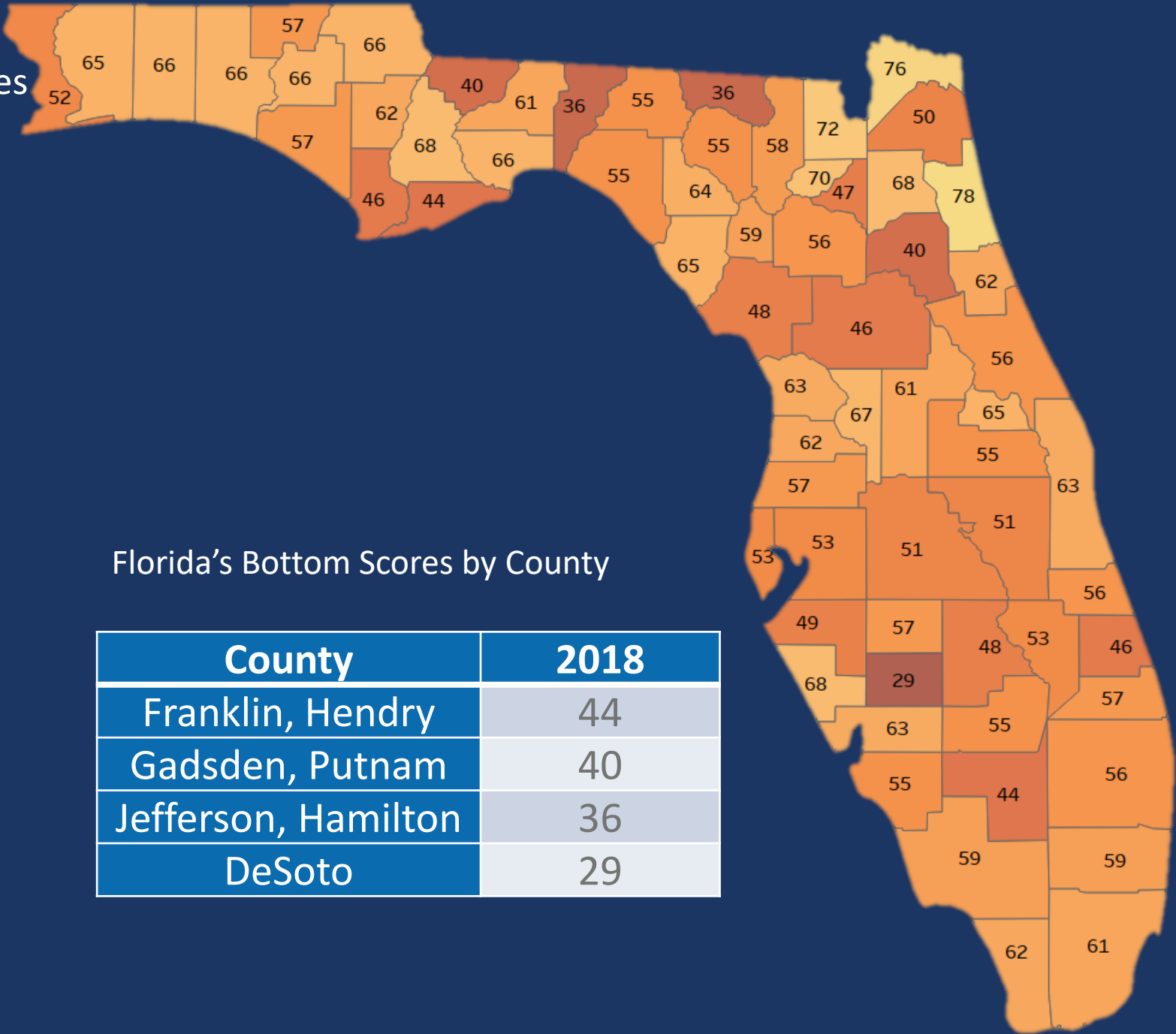


Florida's Top Scores by County

County	2018
St. Johns	78
Nassau	76
Baker	72
Union	70

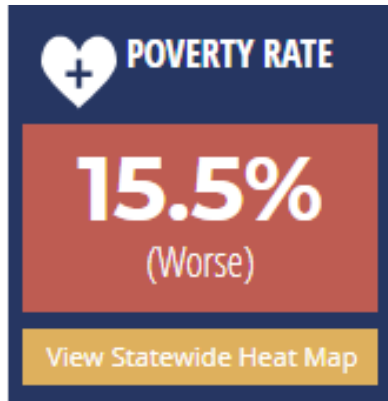
Florida's Bottom Scores by County

County	2018
Franklin, Hendry	44
Gadsden, Putnam	40
Jefferson, Hamilton	36
DeSoto	29



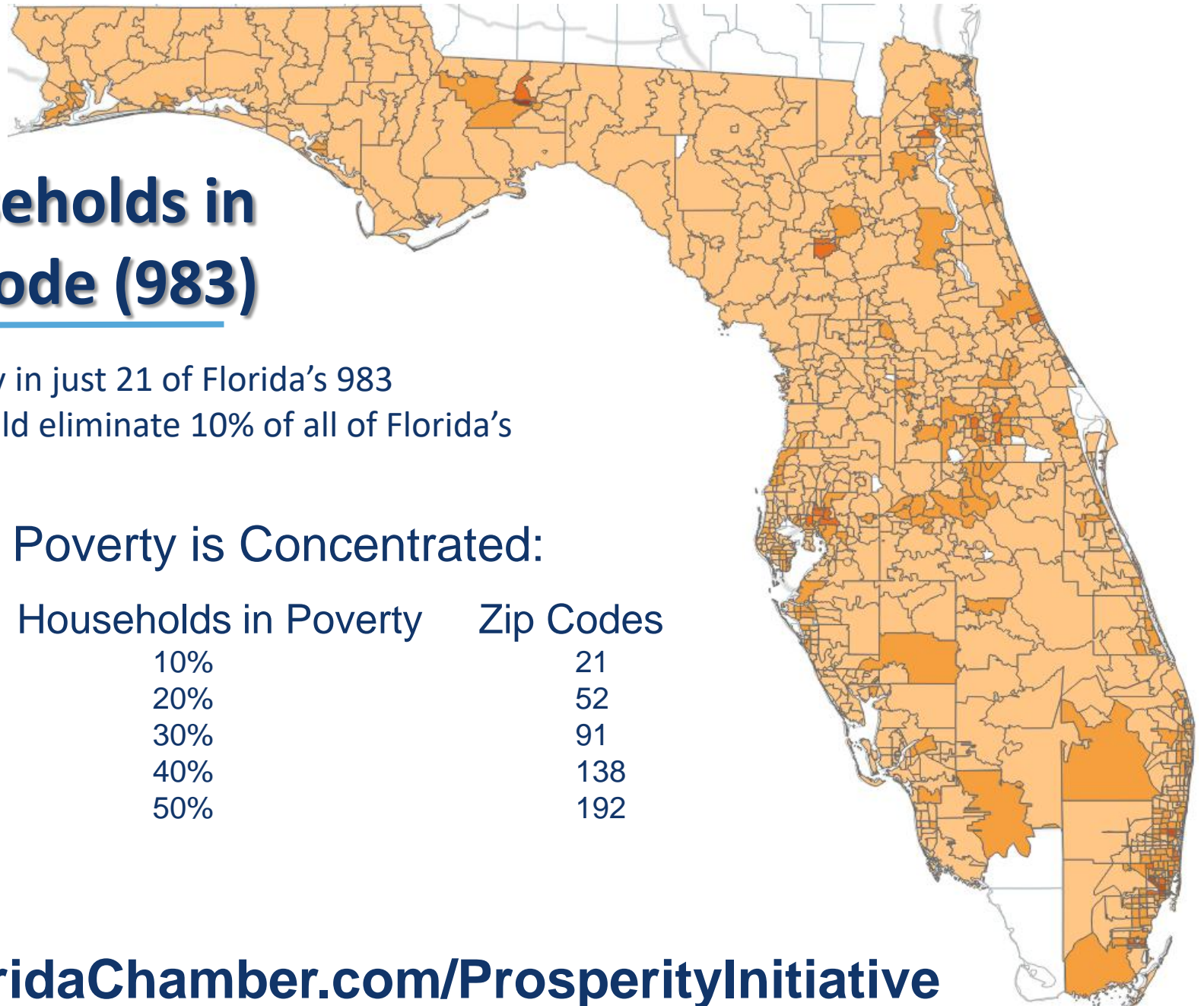
Number of Households in Poverty by Zip Code (983)

“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



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Florida's New 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-Designate Bill Galvano

Balance of Power

- Senate – 23 R, 17 D
 - 65% new since 2016
- House – 73 R, 47 D
 - 70% new since 2016

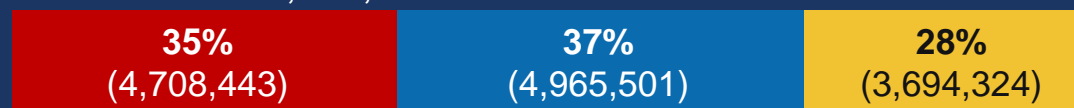
110 of 160 of the Legislature
have two or fewer years of
experience



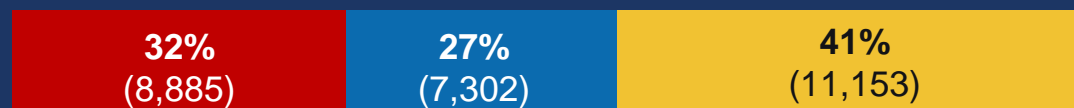
House Speaker-Designate José Oliva

Registration Comparisons Over Time

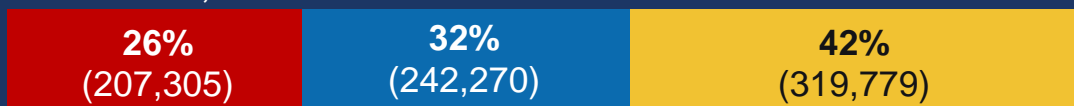
Total State: 13,368,268



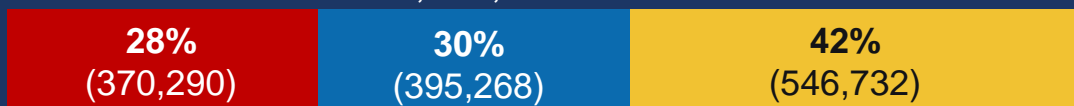
December 2018: 27,340



2018: 769,354

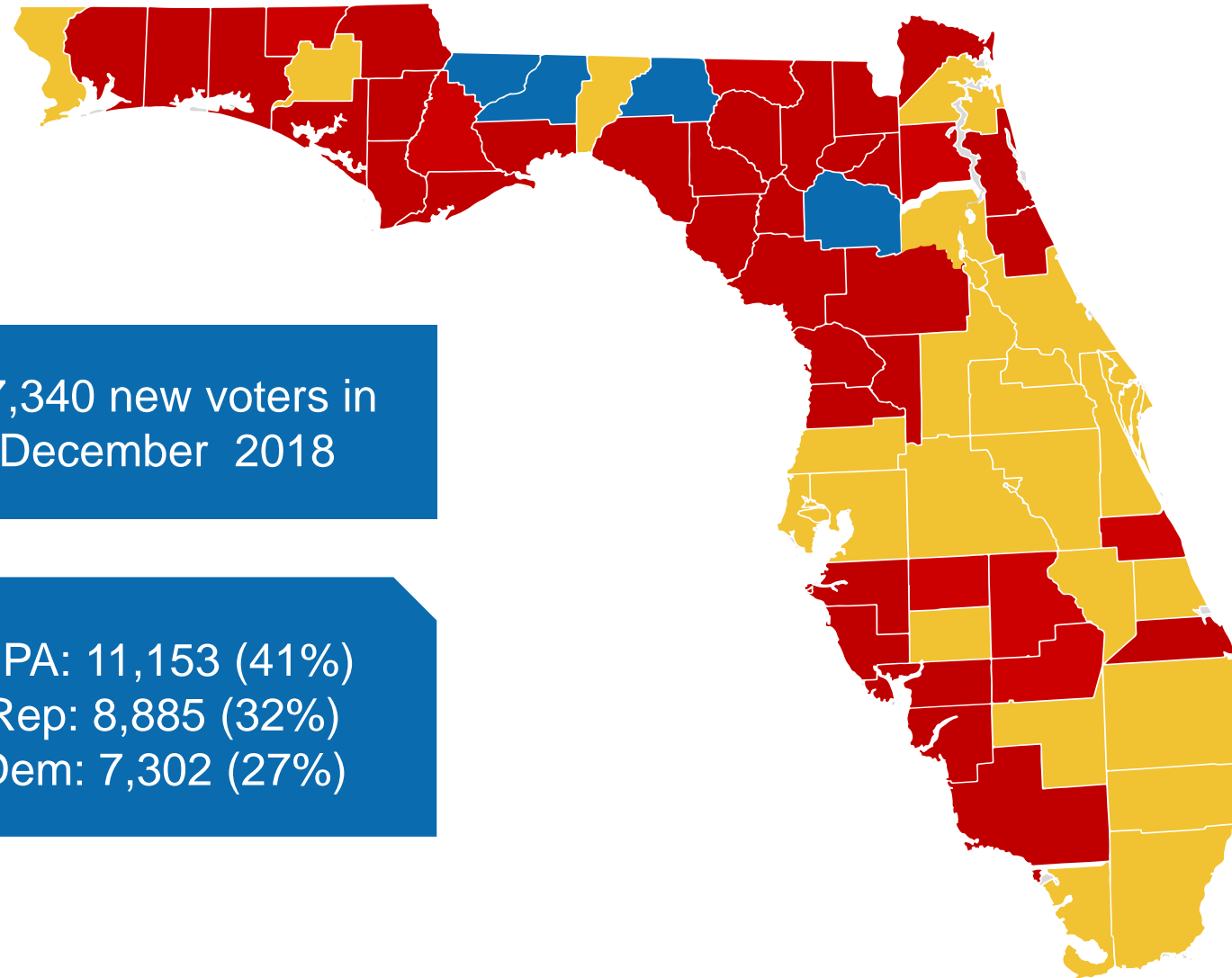


Since 2016 Election: 1,312,290



■ Republican
■ Democratic
■ NPA/Other

DECEMBER NEW VOTERS
By County

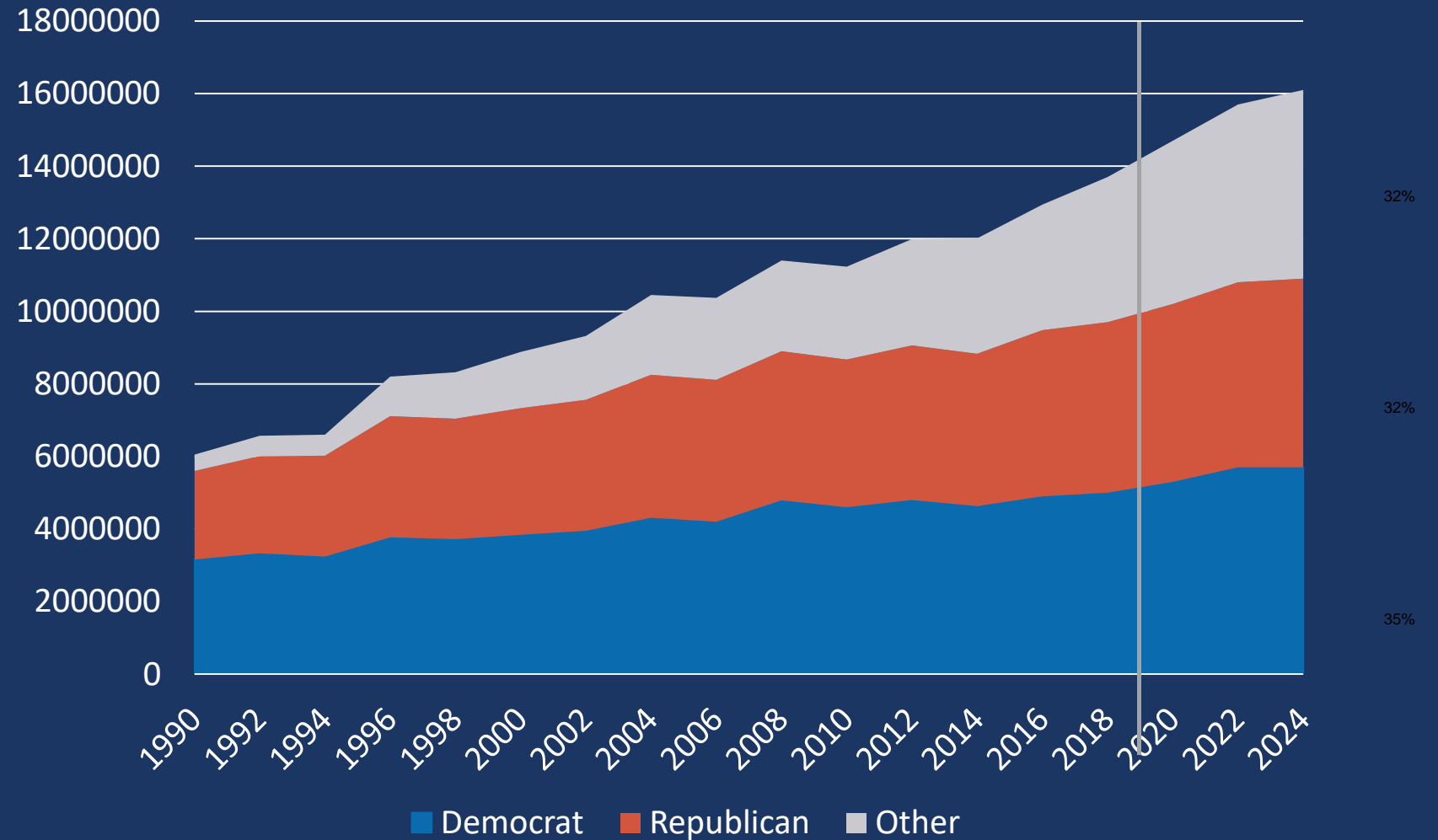


27,340 new voters in
December 2018

NPA: 11,153 (41%)
Rep: 8,885 (32%)
Dem: 7,302 (27%)

Voters Aren't Choosing Parties

Party
Registration
Projected
1990-2024





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