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<https://www.flchamber.com/LayoftheLand>



1 PLAN
3 GOALS
6 PILLARS
for Florida 2030



1 STEERING COMMITTEE
6 ADVISORY COMMITTEES
155+ PARTNERS & LEADERS
weighing in on Florida's future



10,000+ FLORIDIANS
engaged through
83 TOWN HALLS
covering all
67 COUNTIES

Coordinates



Help secure Florida's future at
Florida2030.org

Track Florida's progress at
TheFloridaScorecard.org

Improving Florida's talent pipeline for a better workforce

- >**80%** of Florida's workforce has essential **employability skills**
- >**60%** of Floridians 25-64 have a high-value **postsecondary certificate, degree, or training experience**
- 95%** of entering **high school students graduate within 4 years**
- 100%** of Florida **8th graders read & perform math at or above grade level**
- 100%** of Florida **3rd graders read at or above grade level**
- 100%** of children are **ready for kindergarten**

Creating good jobs by diversifying Florida's economy

- Top** state for **gross domestic product** and **top quartile most diversified state economy**
- #1** state for **overseas visitors**
- Goods** exports **double** and **services** exports **triple**
- Top 5** state for **manufacturing jobs**
- Top 3** state for **technology jobs**
- #1** state for **business startups**
- Top 3** state for **venture capital investments**
- Top 3** state for **research and development funding** and **patents issued**
- Rural county** share of Florida gross domestic product **doubles**

Preparing Florida's infrastructure for smart growth and development

- Diverse, attainable housing** to meet future demand
- Every resident has access to **public and private mobility services**
- All major population and economic centers connected** to regional, national, and global markets by **high-capacity corridors**
- World's **most capable spaceport; top-tier airports, seaports, and surface transportation hubs** in U.S.
- 100%** of Florida residents have access to **high-speed communications connectivity**
- Diverse and reliable energy, water, and waste management resources** to meet future demand
- All Florida residents** protected by **resiliency plans**

Building the perfect climate for business

- Actuarially sound **property insurance** rates based on **actual risk and competition**
- #1 business tax climate** in the nation
- Regulatory, labor, and operating risk environments** rated among **top 5** in the nation
- Environmental permitting and local land use** processes rated among **top quartile in the nation**
- Occupational licensing laws** rated among **top 5 in the nation**
- Legal climate** improves to **top quartile in the nation**

Making government and civics more efficient and effective

- 100%** of **state agencies** aligned with Florida 2030 goals
- 100%** of **regional economic development plans** aligned with Florida 2030 goals
- 100%** of Florida residents covered by **regional visioning processes**
- Increased** size and impact of **nonprofit and philanthropic sectors**
- Doubling** the rate of Floridians who **volunteer and participate in civic and public service**, moving us from the bottom to the **top quartile**

Championing Florida's quality of life

- Top 5** state for **overall well being**
- Florida's brand and reputation as **best place to live, work, raise a family, visit, learn, play, relocate, and compete** remains **top in the nation**
- <**10%** of Florida children **live in poverty** and **100%** have a **pathway out**
- < **10%** of Florida residents live in **housing-cost burdened households**
- Crime rates** rank among the **lowest 10 states**
- Florida **protects and enhances** the value of its **arts, culture, heritage, and sense of place**

State of Florida Metrics

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

Florida FutureCast

FLORIDA POPULATION 03/22/2019

21,509,754

UNEMPLOYMENT RATE

3.5%
(Increasing)

[View Statewide Heat Map](#)

Jobs Year Over Year Change

211,900

[View Statewide Heat Map](#)

3RD GRADE READING SCORES

57%
(Declining)

[View Statewide Heat Map](#)

100%
2030 Goal

STATE OF FLORIDA VISITORS

\$111.7
Billion Visitor Spending

126.1
Million Visitors

STATE HOUSING STARTS & SALES

7,795
Starts (Improving)

15,526
Sales (Declining)

INCOME MIGRATION

\$989K
Per Hour

POVERTY RATE

15.5%
(Worse)

[View Statewide Heat Map](#)

CONSUMER SENTIMENT

100.9
(Improving)

HIGH SCHOOL GRADUATION RATE

86.1%
(Improving)

[View Statewide Heat Map](#)

SALES TAX REVENUE

\$2.470
Billion per Month (Improving)

VOTER PARTICIPATION

62%
(Declining)

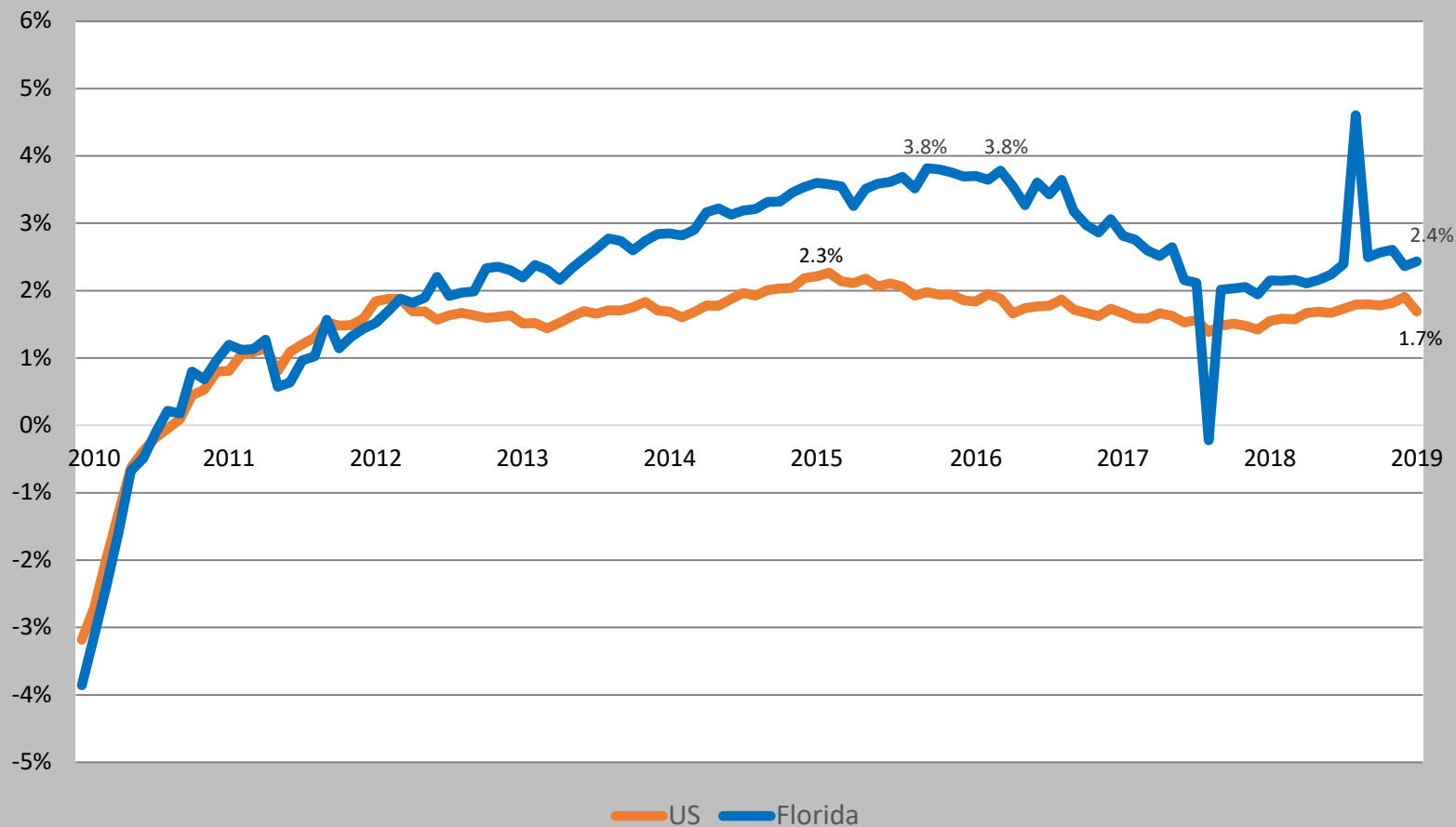
RIGHT / WRONG DIRECTION

54%/25%

LAND IN CONSERVATION

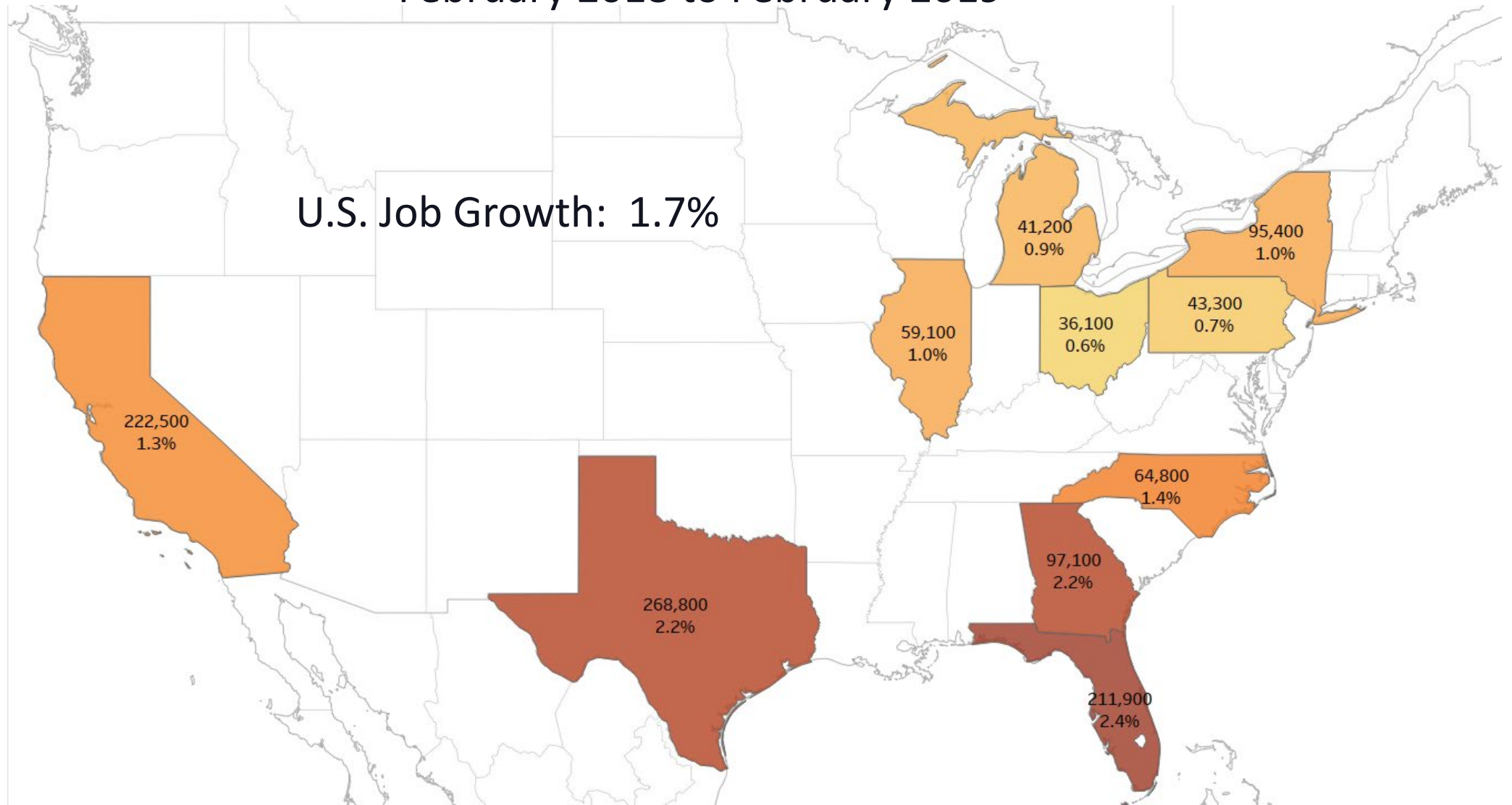
27%

Job Growth Rates - Florida versus U.S.



Job Growth for 10 Most Populous States

February 2018 to February 2019



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%

Year-over-Year Job Creation

February 2018-February 2019

U.S. Growth Rate: 1.7%

Florida Growth Rate: 2.4%

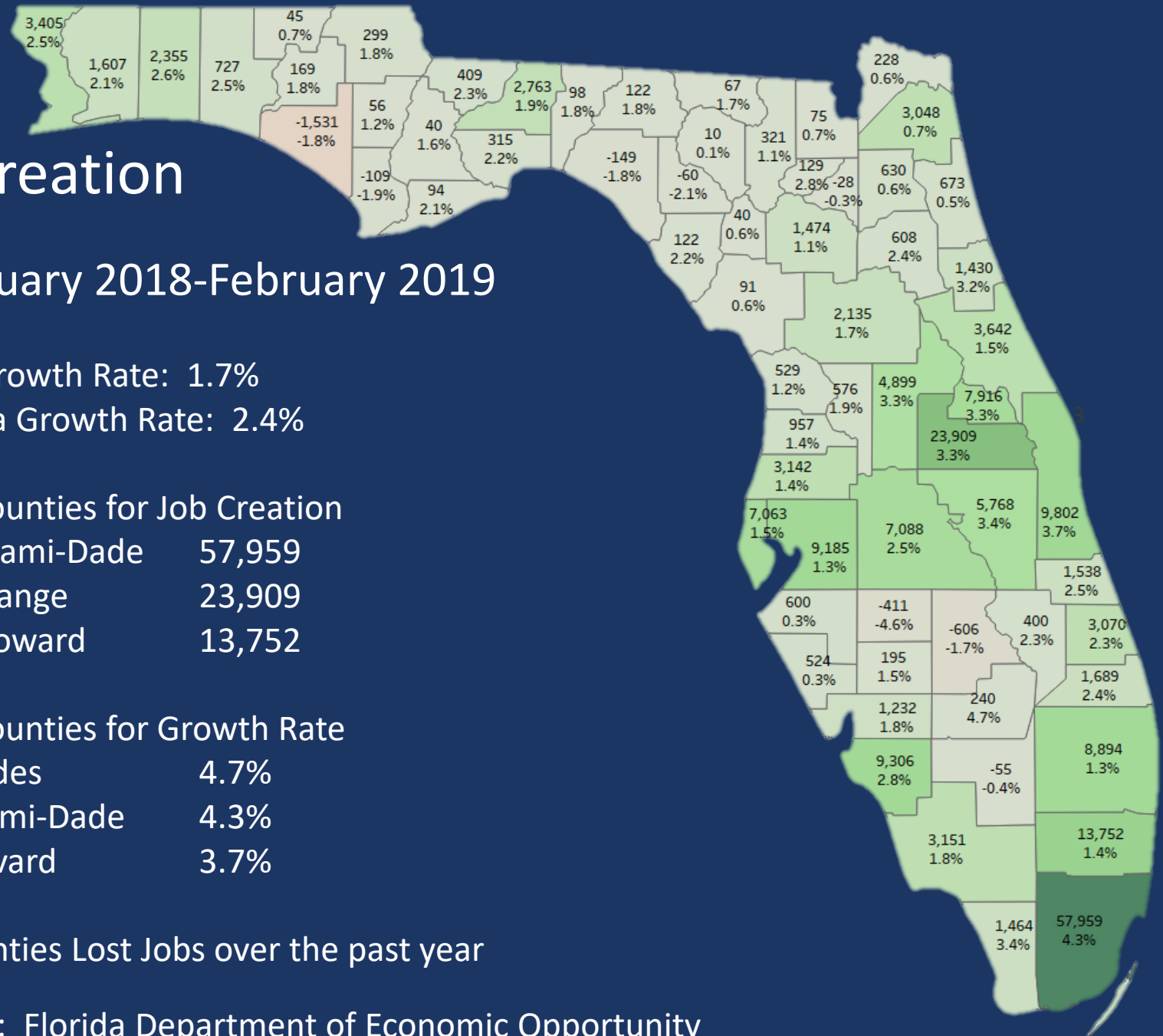
Top Counties for Job Creation

1. Miami-Dade 57,959
2. Orange 23,909
3. Broward 13,752

Top Counties for Growth Rate

1. Glades 4.7%
2. Miami-Dade 4.3%
3. Brevard 3.7%

8 Counties Lost Jobs over the past year



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%

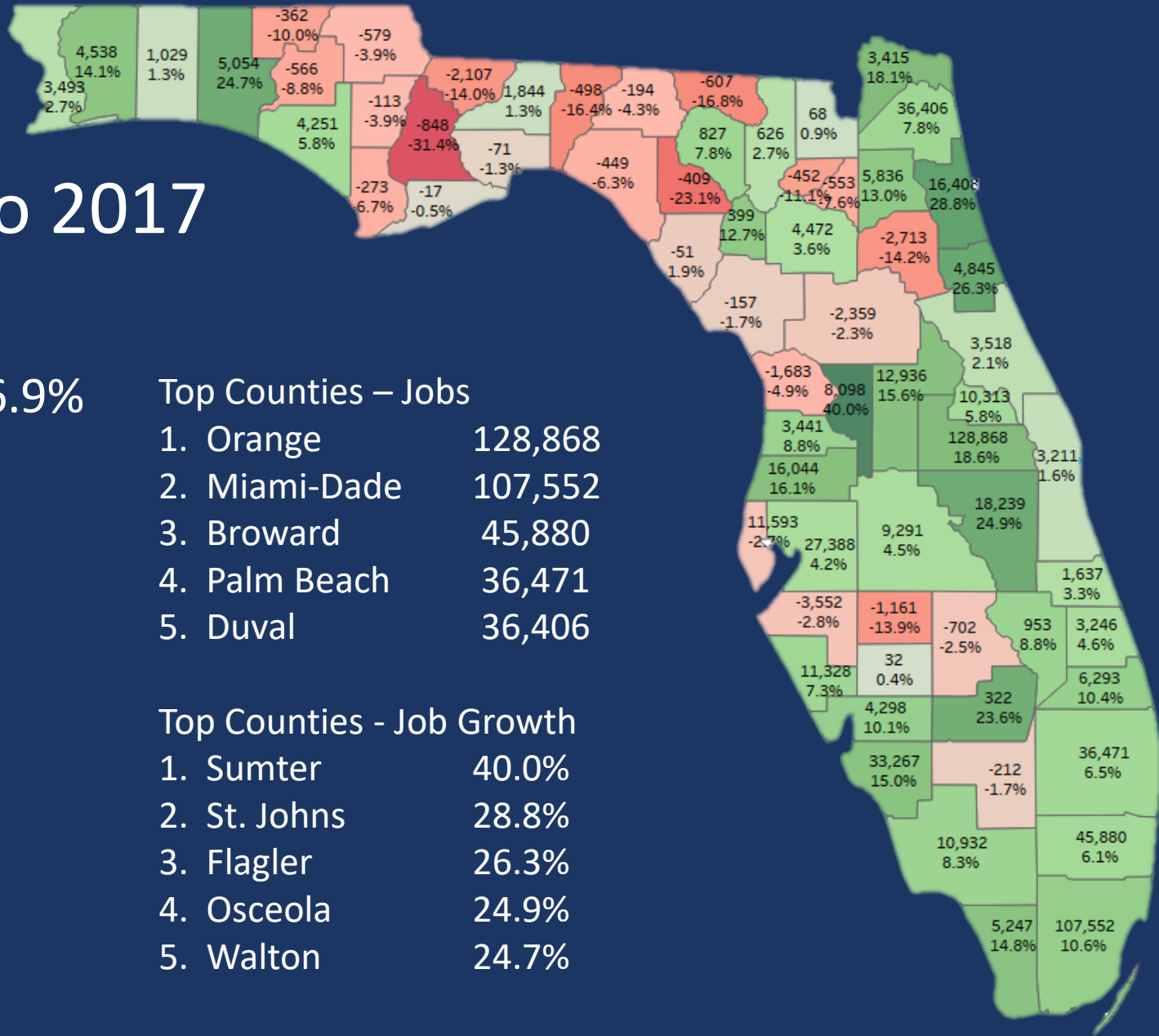
53.2% of U.S. Counties Lost Jobs
between 2007 and 2017

Top Counties – Jobs

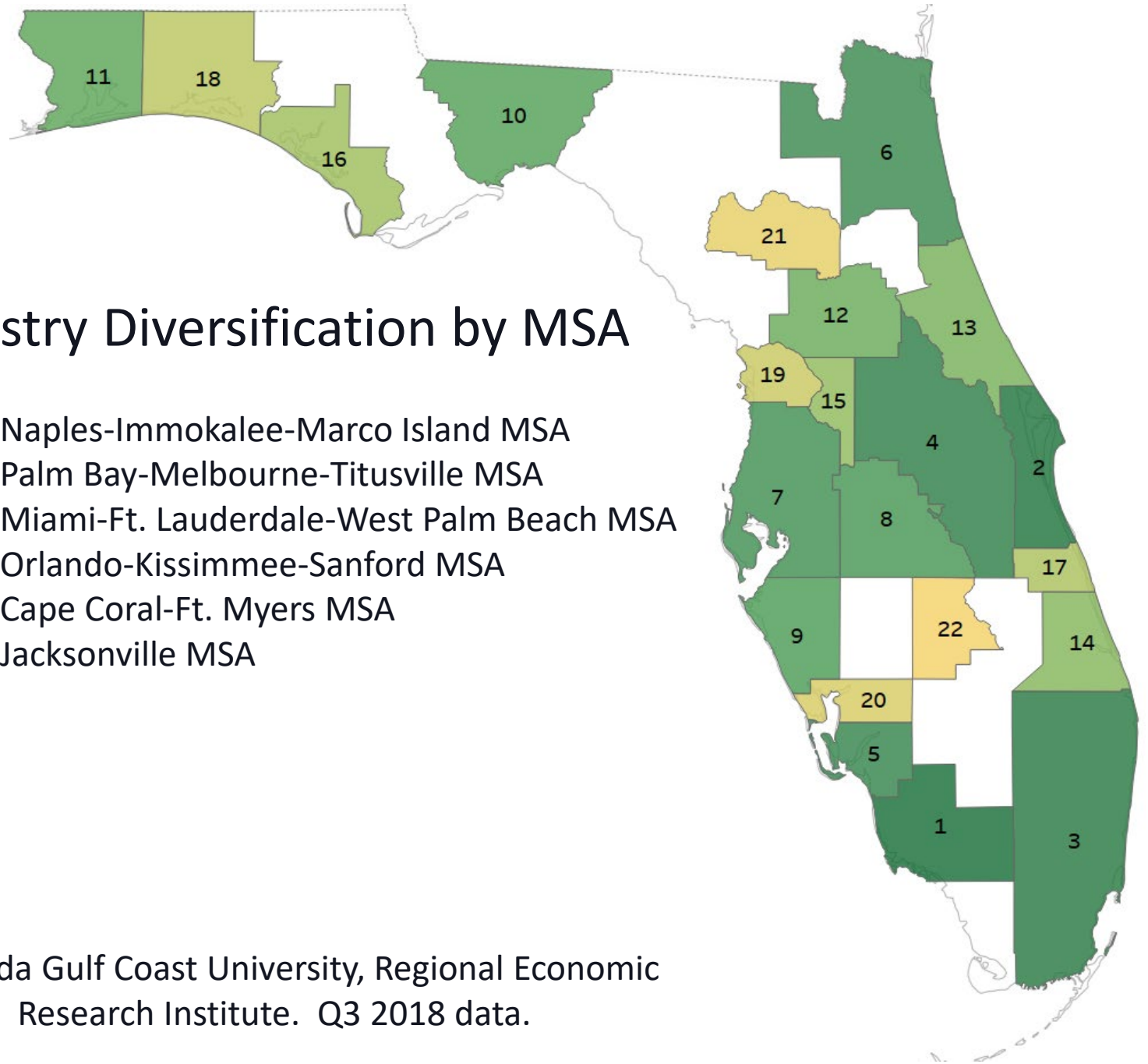
1. Orange	128,868
2. Miami-Dade	107,552
3. Broward	45,880
4. Palm Beach	36,471
5. Duval	36,406

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%



Florida



Florida Industry Diversification by MSA

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

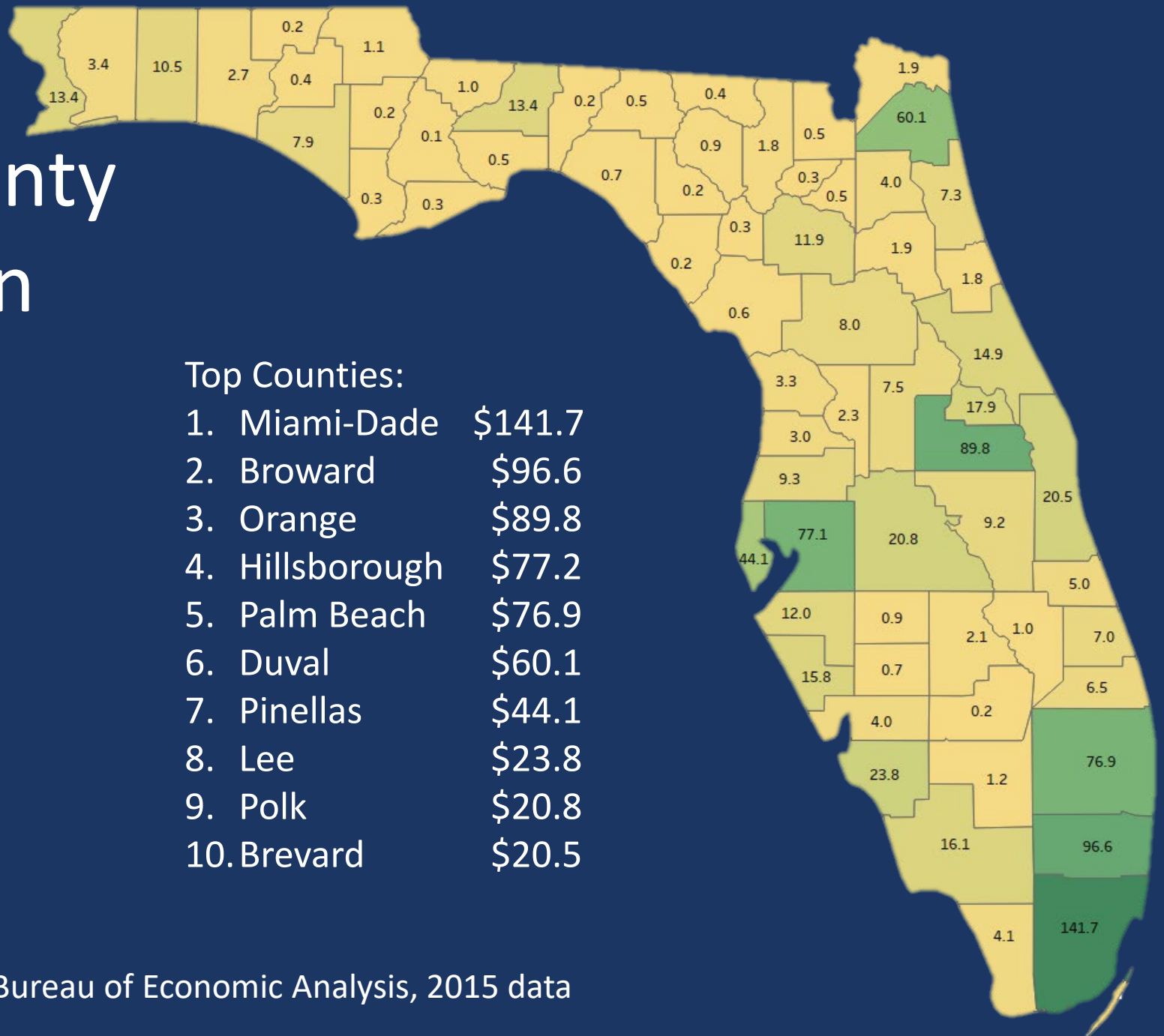
Data Source: Florida Gulf Coast University, Regional Economic Research Institute. Q3 2018 data.

GDP by County in \$ Billion

29 RAO counties
account for
2.16% of
Florida's GDP

Top Counties:

1. Miami-Dade	\$141.7
2. Broward	\$96.6
3. Orange	\$89.8
4. Hillsborough	\$77.2
5. Palm Beach	\$76.9
6. Duval	\$60.1
7. Pinellas	\$44.1
8. Lee	\$23.8
9. Polk	\$20.8
10. Brevard	\$20.5



Data Source: Bureau of Economic Analysis, 2015 data

Manufacturing Jobs by County

Florida Manufacturing Job Growth over last 3 years:

28,559 jobs – 4th, behind Michigan, Georgia, California

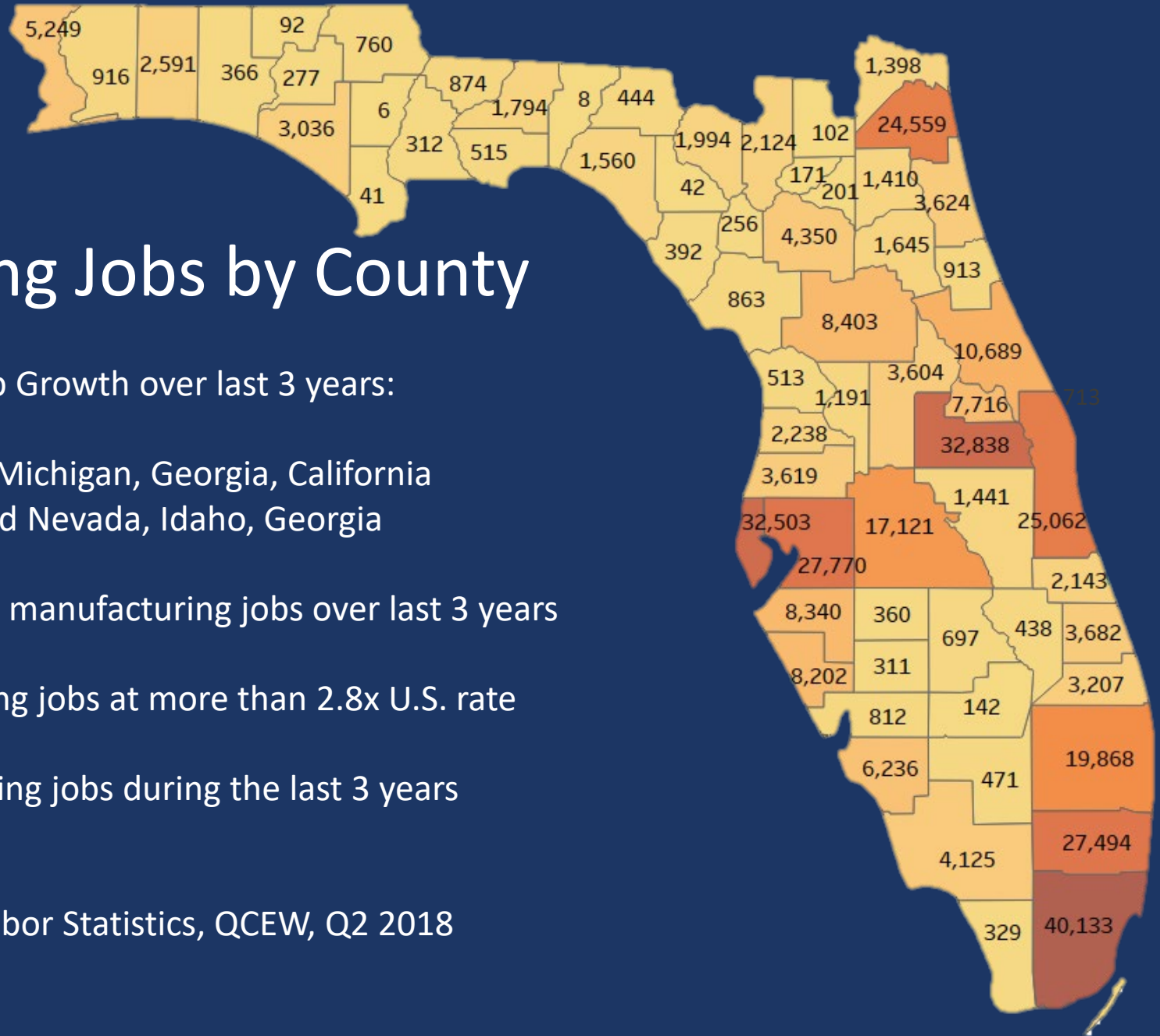
8.4% increase – 4th, behind Nevada, Idaho, Georgia

Florida grew 1 out of 11.5 manufacturing jobs over last 3 years

Florida grew manufacturing jobs at more than 2.8x U.S. rate

13 States lost manufacturing jobs during the last 3 years

Data Source: Bureau of Labor Statistics, QCEW, Q2 2018



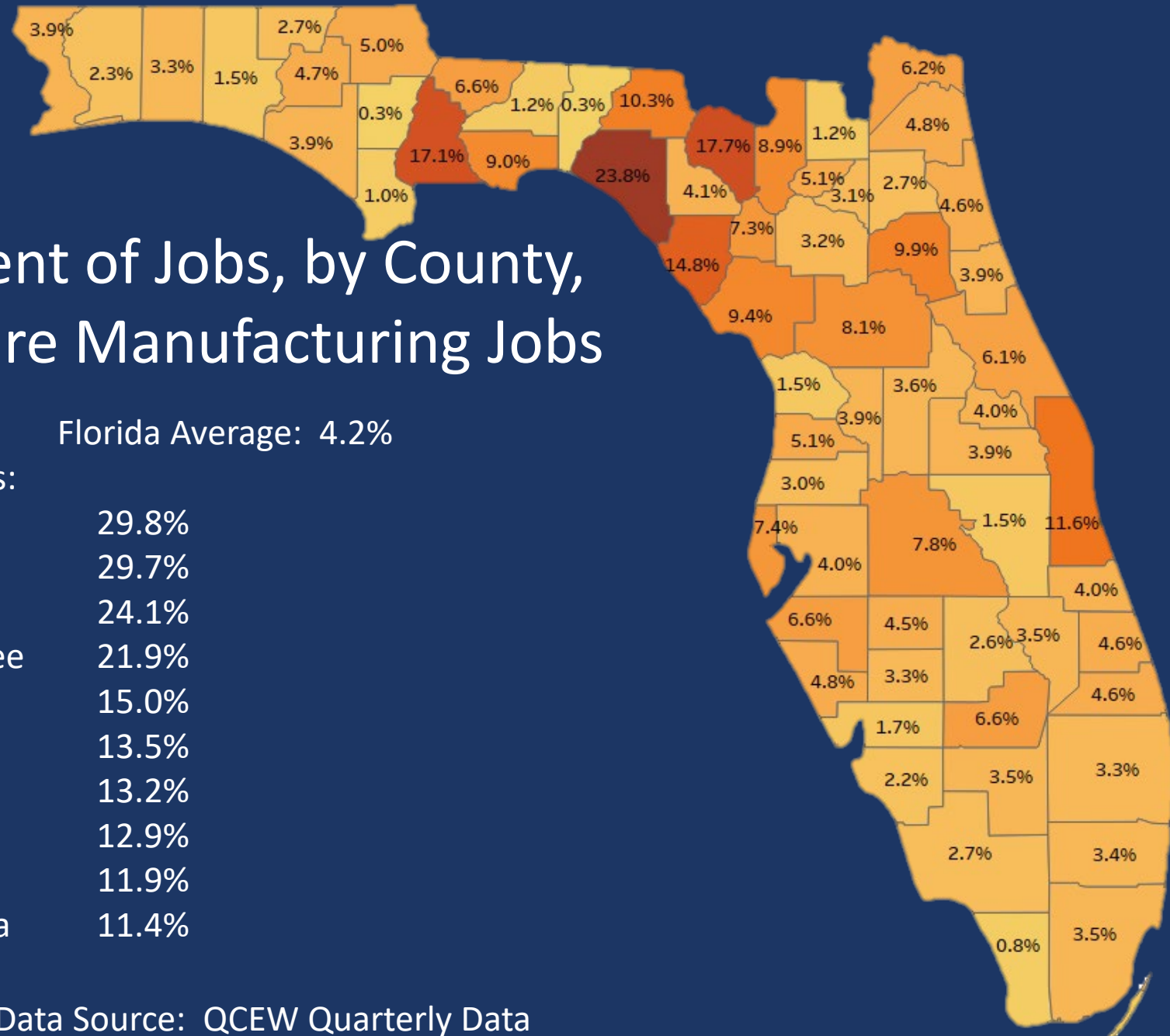
Percent of Jobs, by County, that are Manufacturing Jobs

Florida Average: 4.2%

Top Counties:

1. Taylor	29.8%
2. Liberty	29.7%
3. Dixie	24.1%
4. Suwannee	21.9%
5. Madison	15.0%
6. Brevard	13.5%
7. Wakulla	13.2%
8. Putnam	12.9%
9. Levy	11.9%
10. Columbia	11.4%

Data Source: QCEW Quarterly Data



Florida's Next 5 million People

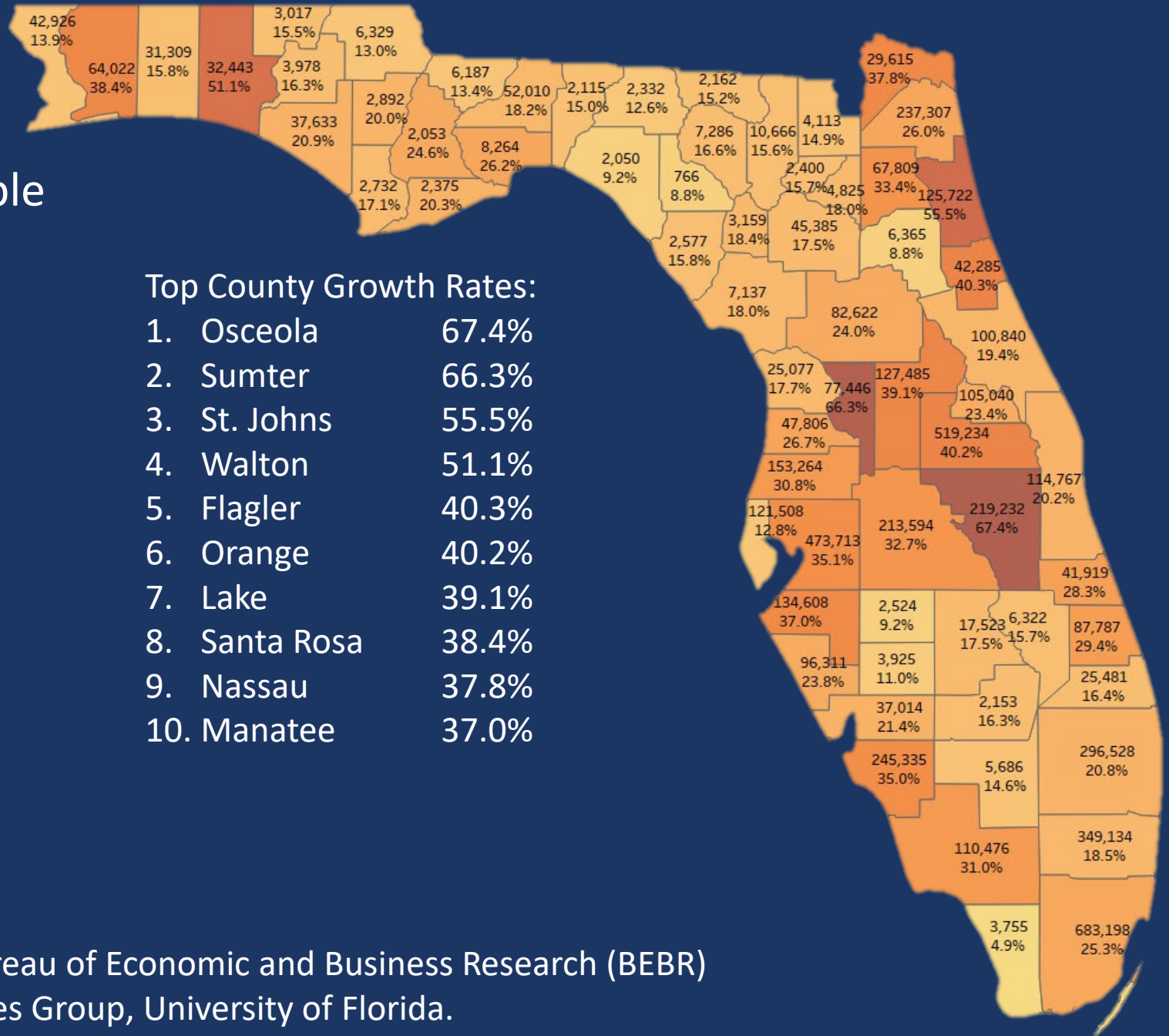
Top Counties for Population Growth

1. Miami-Dade	683,198
2. Orange	519,234
3. Hillsborough	473,713
4. Broward	349,134
5. Palm Beach	296,528
6. Lee	245,335
7. Duval	237,307
8. Osceola	219,232
9. Polk	213,594
10. Pasco	153,264

Top County Growth Rates:

1. Osceola	67.4%
2. Sumter	66.3%
3. St. Johns	55.5%
4. Walton	51.1%
5. Flagler	40.3%
6. Orange	40.2%
7. Lake	39.1%
8. Santa Rosa	38.4%
9. Nassau	37.8%
10. Manatee	37.0%

The top 10 counties will account for 59.6% of Florida's Population Growth

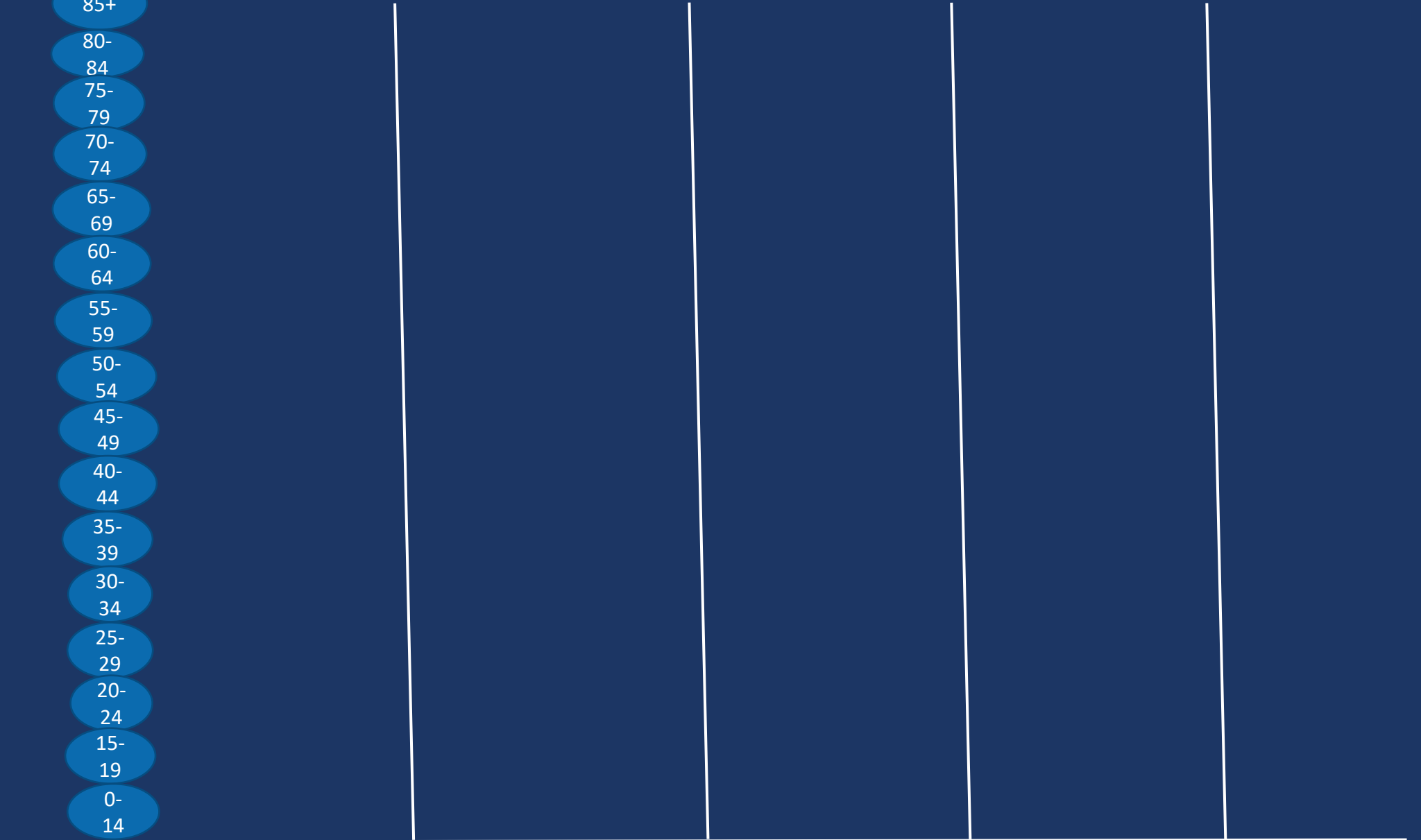


Data Source: Bureau of Economic and Business Research (BEBR) Population Studies Group, University of Florida.

Florida 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



Increase in Age 65+ People by County by 2030

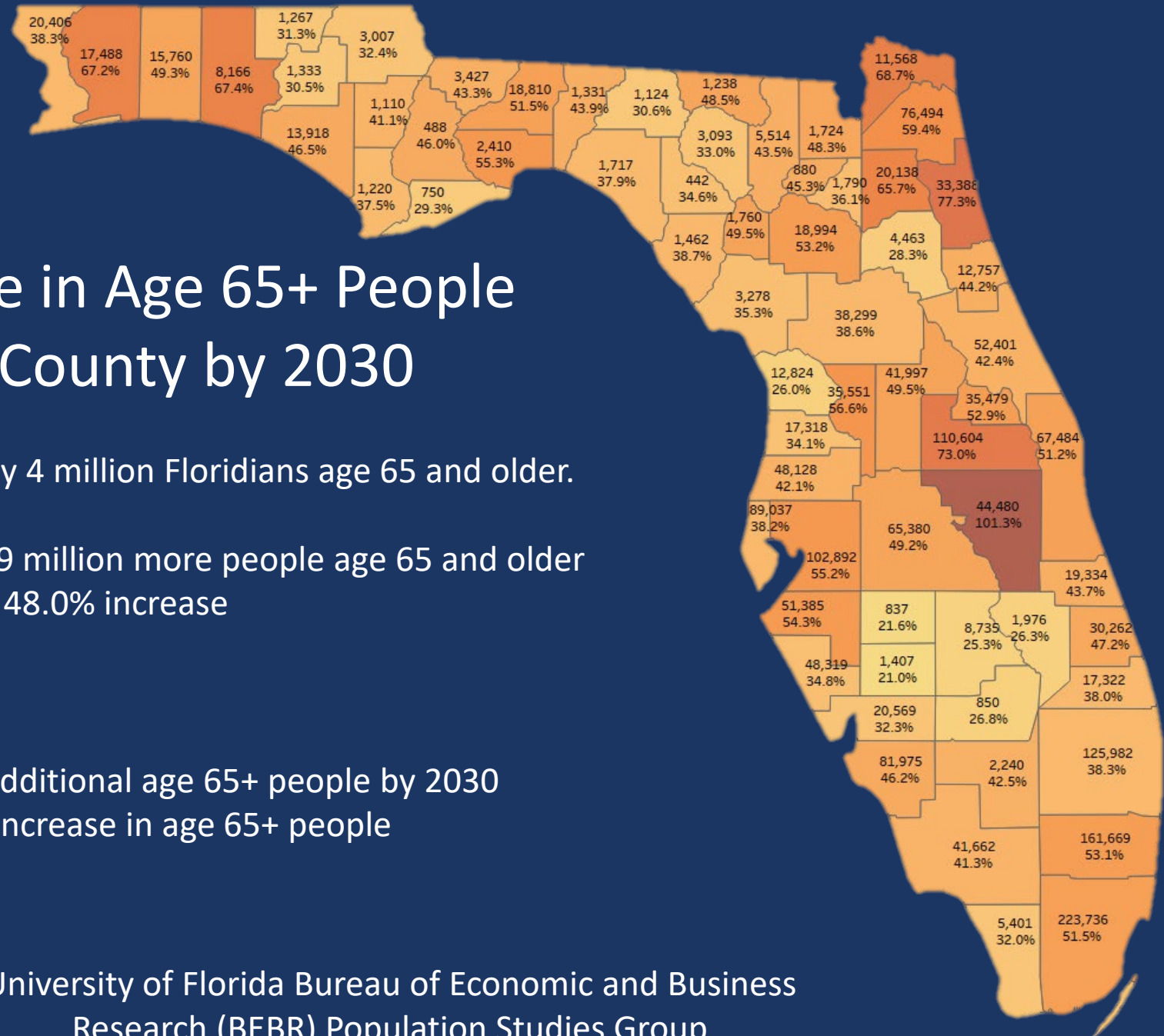
There are currently 4 million Floridians age 65 and older.

Florida will add 1.9 million more people age 65 and older by 2030 – that’s a 48.0% increase

Numbers:

Top: Number of additional age 65+ people by 2030

Bottom: Percent increase in age 65+ people



Data Source: University of Florida Bureau of Economic and Business Research (BEBR) Population Studies Group



Florida Chamber Foundation
**LESS POVERTY,
MORE PROSPERITY:**
The Florida Fiscal Cliffs Report



Kids in Poverty in Florida

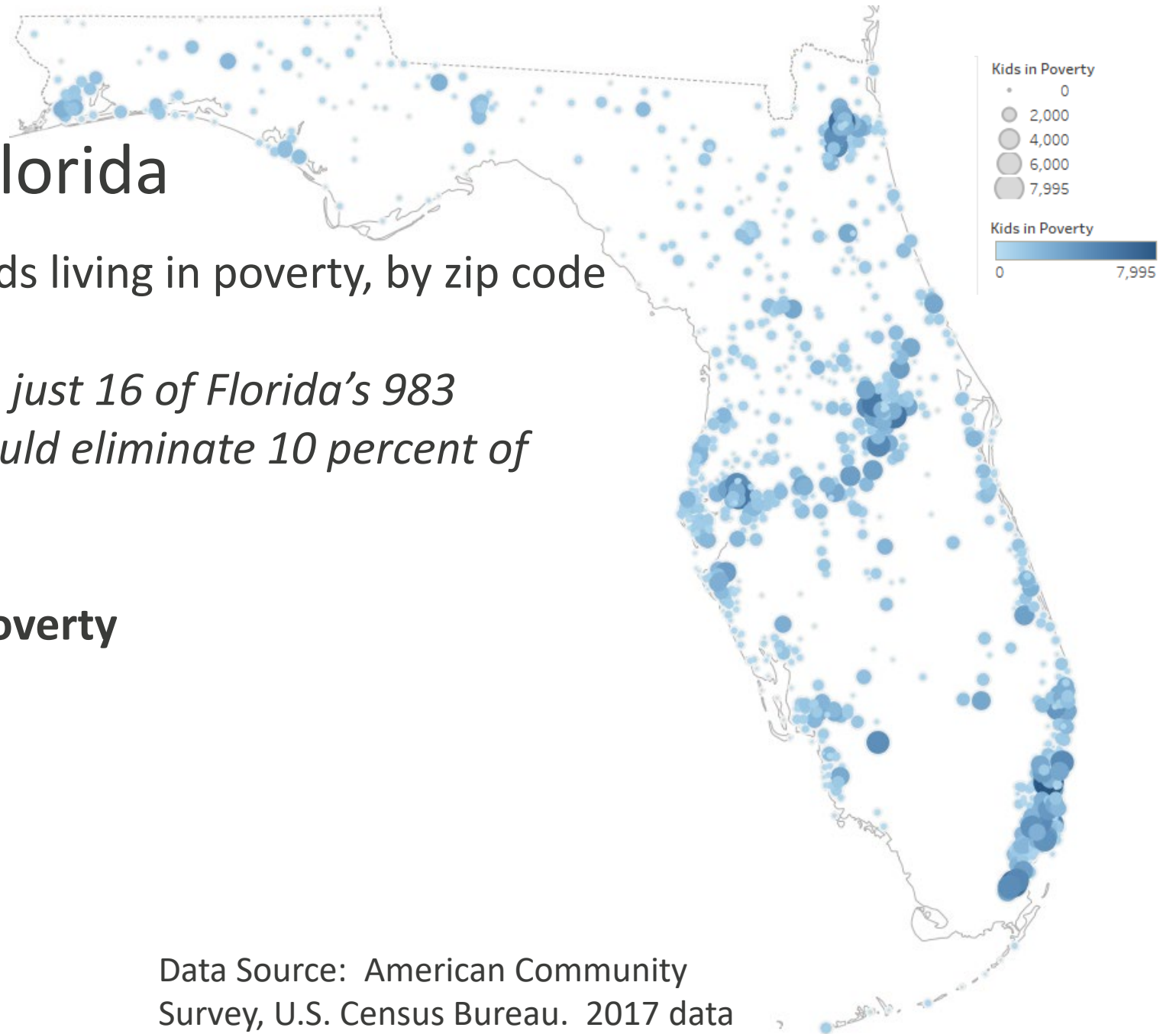
Number of under-18 year olds living in poverty, by zip code

“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%

Data Source: American Community Survey, U.S. Census Bureau. 2017 data



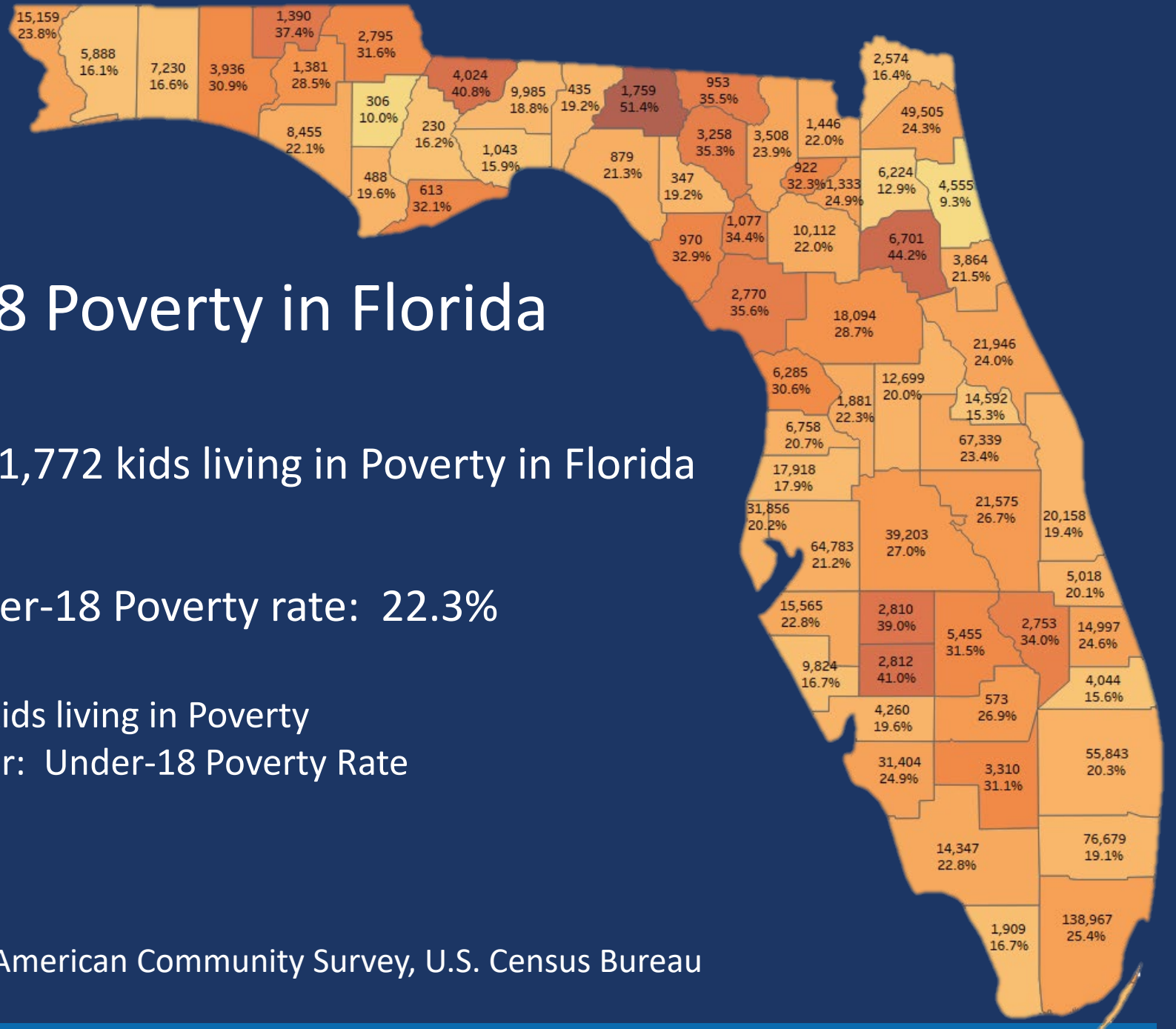
Under-18 Poverty in Florida

There are 901,772 kids living in Poverty in Florida

Florida's under-18 Poverty rate: 22.3%

Top Number: Kids living in Poverty

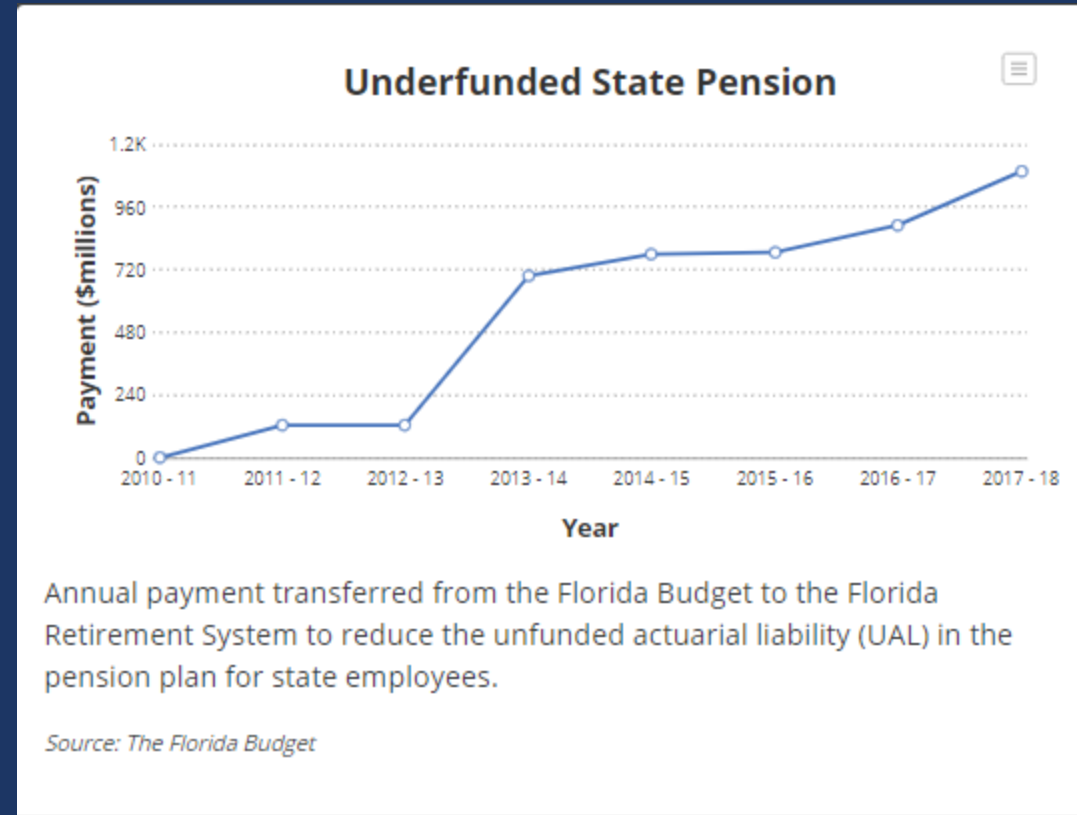
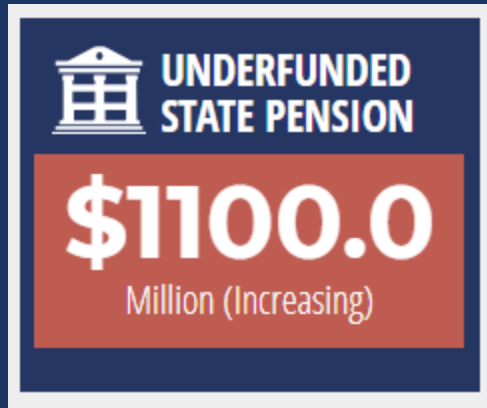
Bottom Number: Under-18 Poverty Rate



Data Source: American Community Survey, U.S. Census Bureau

Florida's Underfunded State Pension

\$4.25 billion transferred since 2013



State of Florida Metrics (What is this?)

Florida FutureCast

Business Climate & Competitiveness

Click any metric to get more information!

 PROBABILITY OF FL RECESSION

21.4%

(Increasing)

 FLORIDA LEADING INDEX

75,700

Jobs

 CONSUMER SENTIMENT

100.9

(Improving)

 CEO RANK

2nd

(Unchanged)

 STATE LEGAL CLIMATE RANKING

46th

(Unchanged)

 SALES TAX REVENUE

\$2.470

Billion per Month (Improving)

 BUSINESS TAX CLIMATE

4th

 OPEN JOBS

285,100

(Increasing)

357,000

Unemployed Persons (Increasing)

 STATE RANKING FOR AUTOMOBILE INSURANCE AFFORDABILITY

#49

 HOMEOWNERS' INSURANCE AFFORDABILITY

Homeowners' Insurance Affordability data is available at the county level.

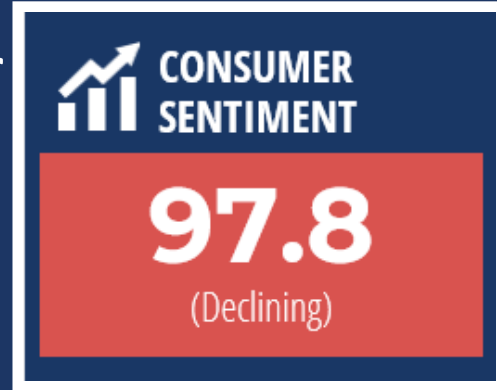
[View Statewide Heat Map](#)

 ASSIGNMENT OF BENEFITS SUITS

34,289

Variables used in Florida's Leading Economic Index

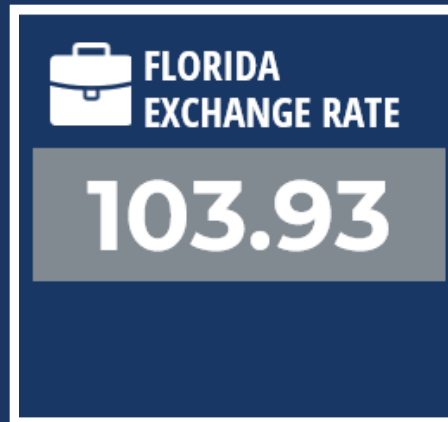
Florida Consumer
Sentiment



Open Jobs



Florida Trade-Weighted Dollar

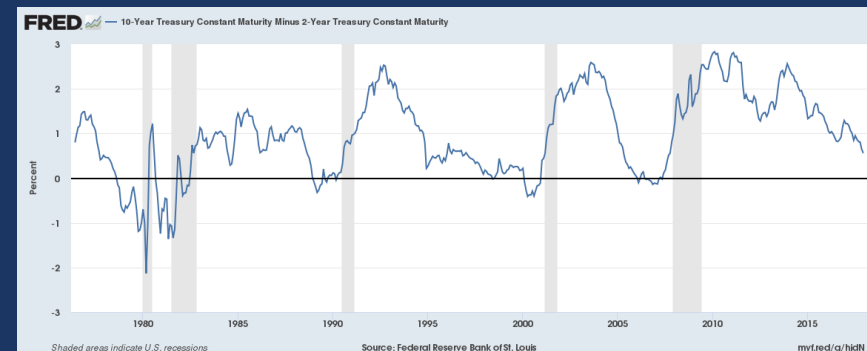
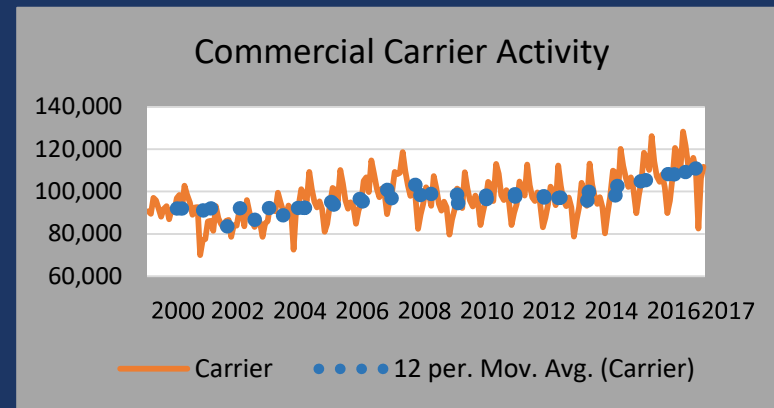
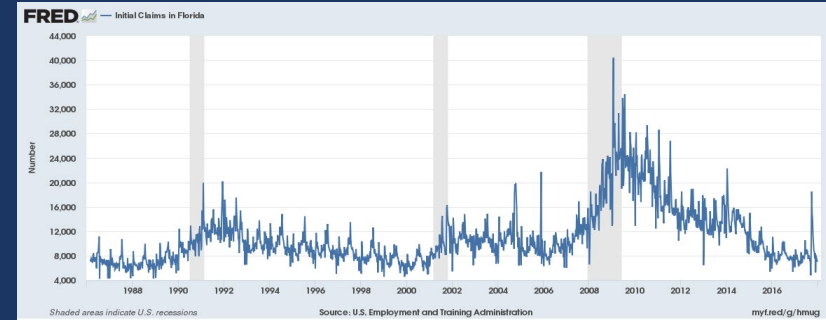


Housing Starts



Variables used in Florida's Leading Economic Index

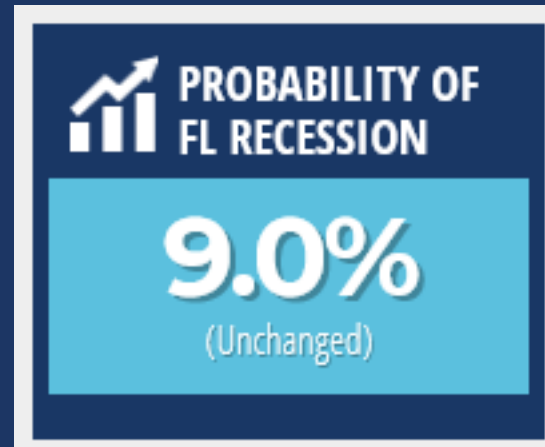
- Florida Initial Unemployment Claims
(Federal Reserve-FRED)
- Commercial Airport Activity
(FAA-ATADS)
- Interest Rate Yield Spread
(Federal Reserve-FRED)



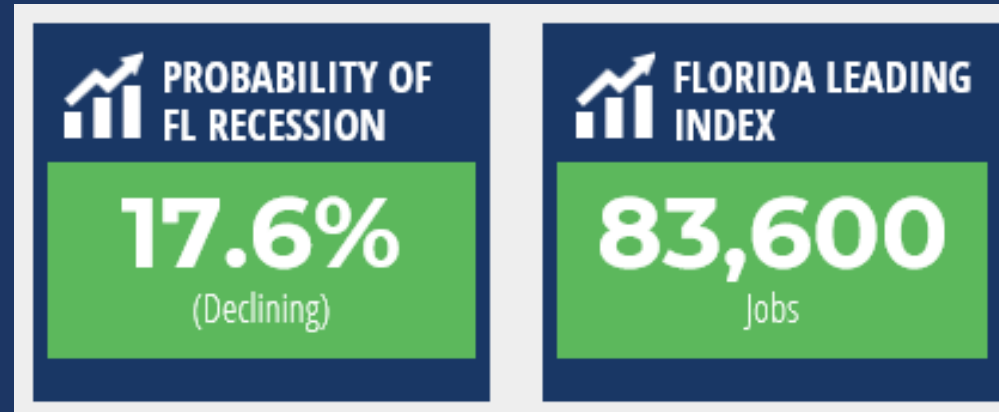
Yield Spread – 10s minus 2s



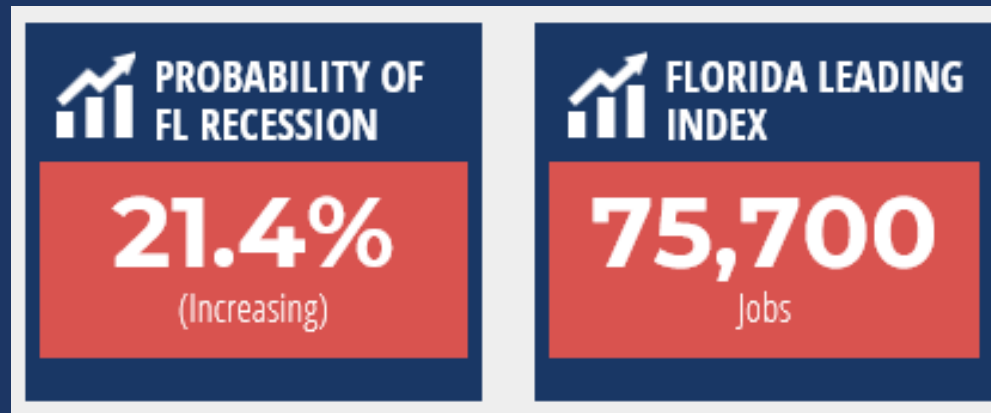
January 2018



February 2019



March 2019



Upcoming Events

Florida Business Leaders' Summit on Prosperity & Economic Opportunity

May 22-23, 2019

Palm Beach Convention Center, West Palm Beach

Florida Chamber Foundation Learners to Earners Workforce Summit

June 18-19, 2019

Wyndham Grand Orlando Resort Bonnet Creek

Environmental Permitting Summer School

July 16-19, 2019

J.W. Marriott Marco Island

Florida Chamber Foundation Military Defense & Veterans Summit

August 13-14, 2019

Hyatt Regency Jacksonville

Future of Florida Forum

October 28-30, 2019

Hyatt Regency Grand Cypress, Orlando

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