



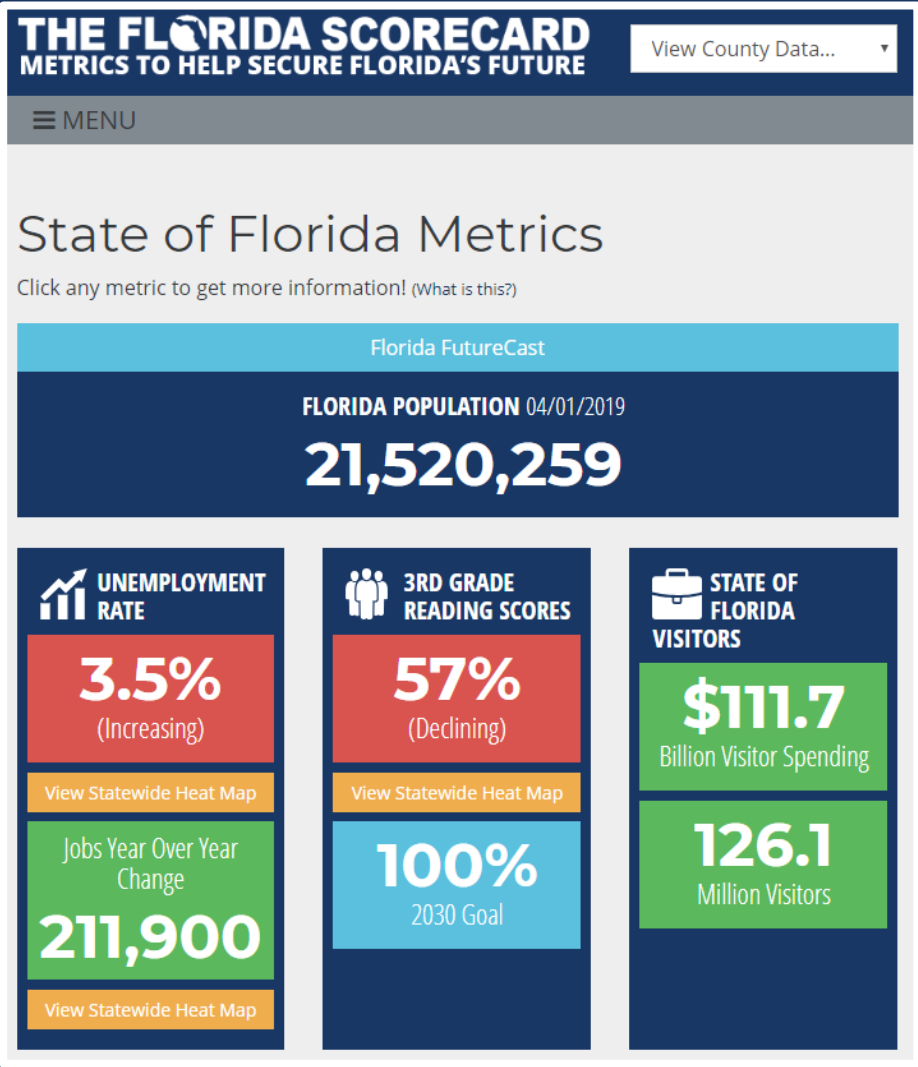
|Uniting Business for Good

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

Uniting Business For Good



Solutions (Research)

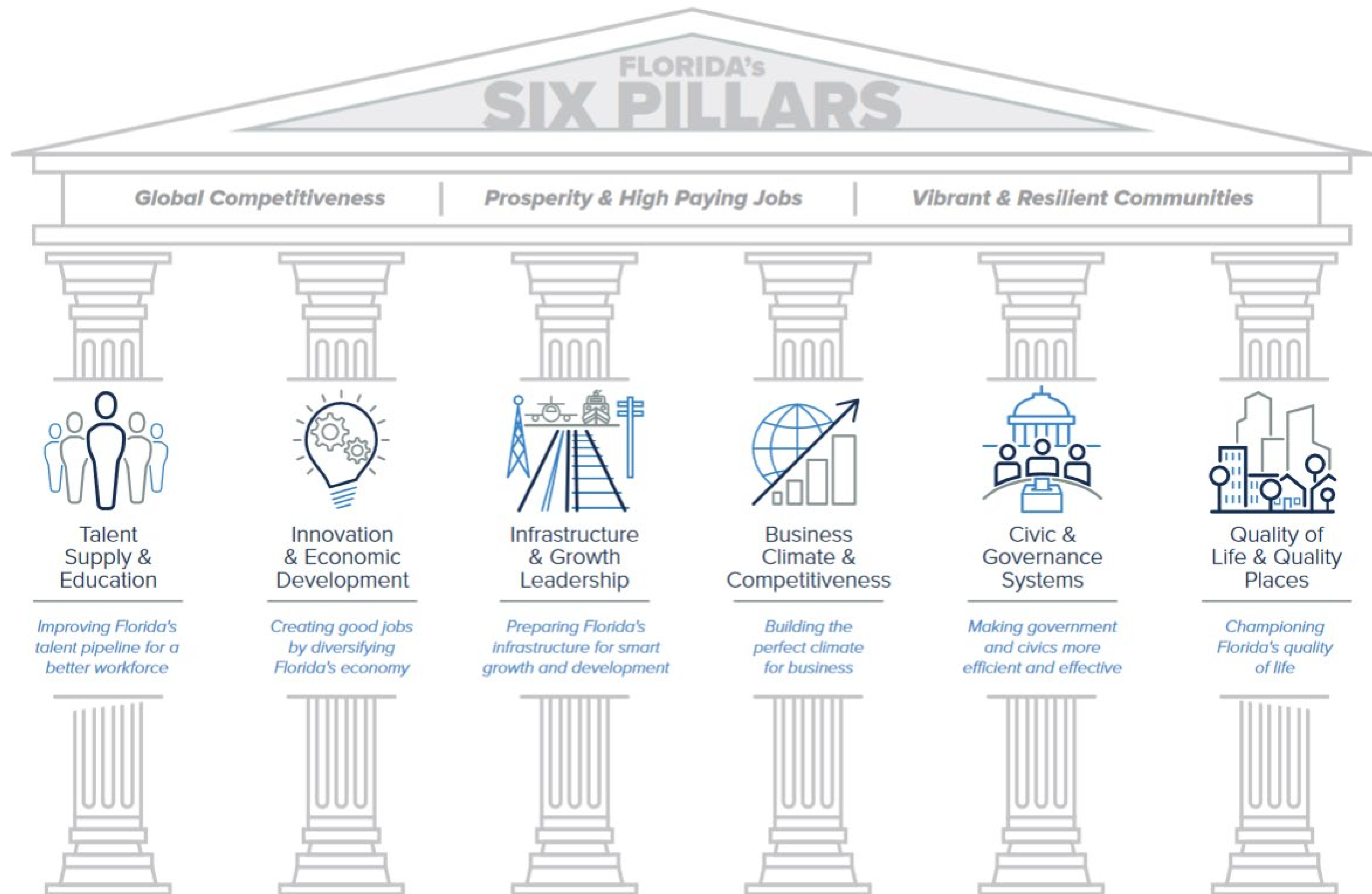


Actions (Lobbying & Grassroots)



Leadership (Elections)





A man in a suit and tie, Mark Wilson, is speaking at a podium. Behind him is a large presentation board titled "THE FLORIDA ECONOMIC DEVELOPMENT BOARD" and "State of Florida Metrics". The board displays various economic indicators in colored boxes. To the left of the board is a Florida state flag. The background is a blue wall with a sign that says "of Florida FORUM".

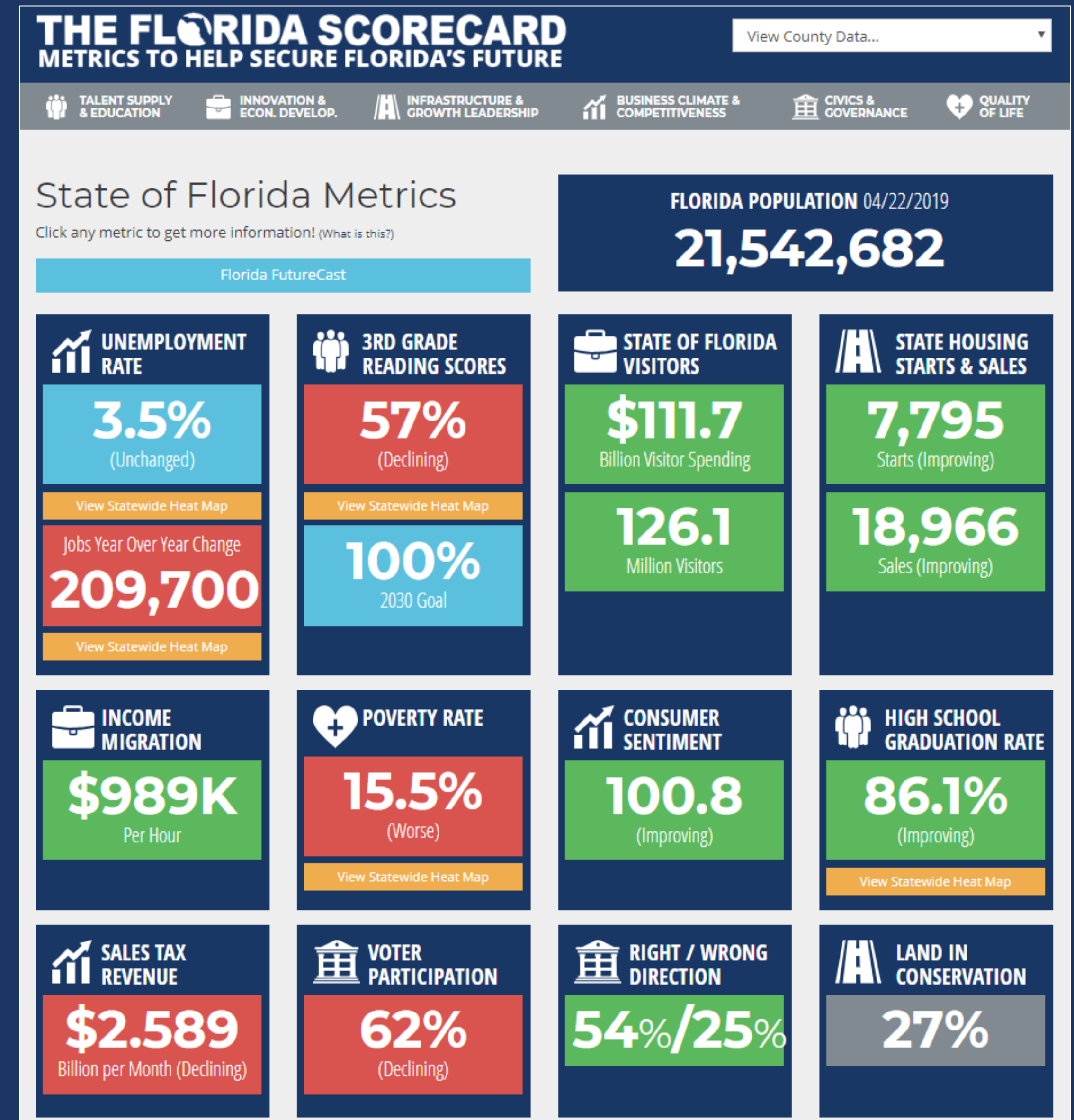
“Florida is changing. Our ECONOMICS, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson

“Our mission is to lead Florida to a new and sustainable economy.”

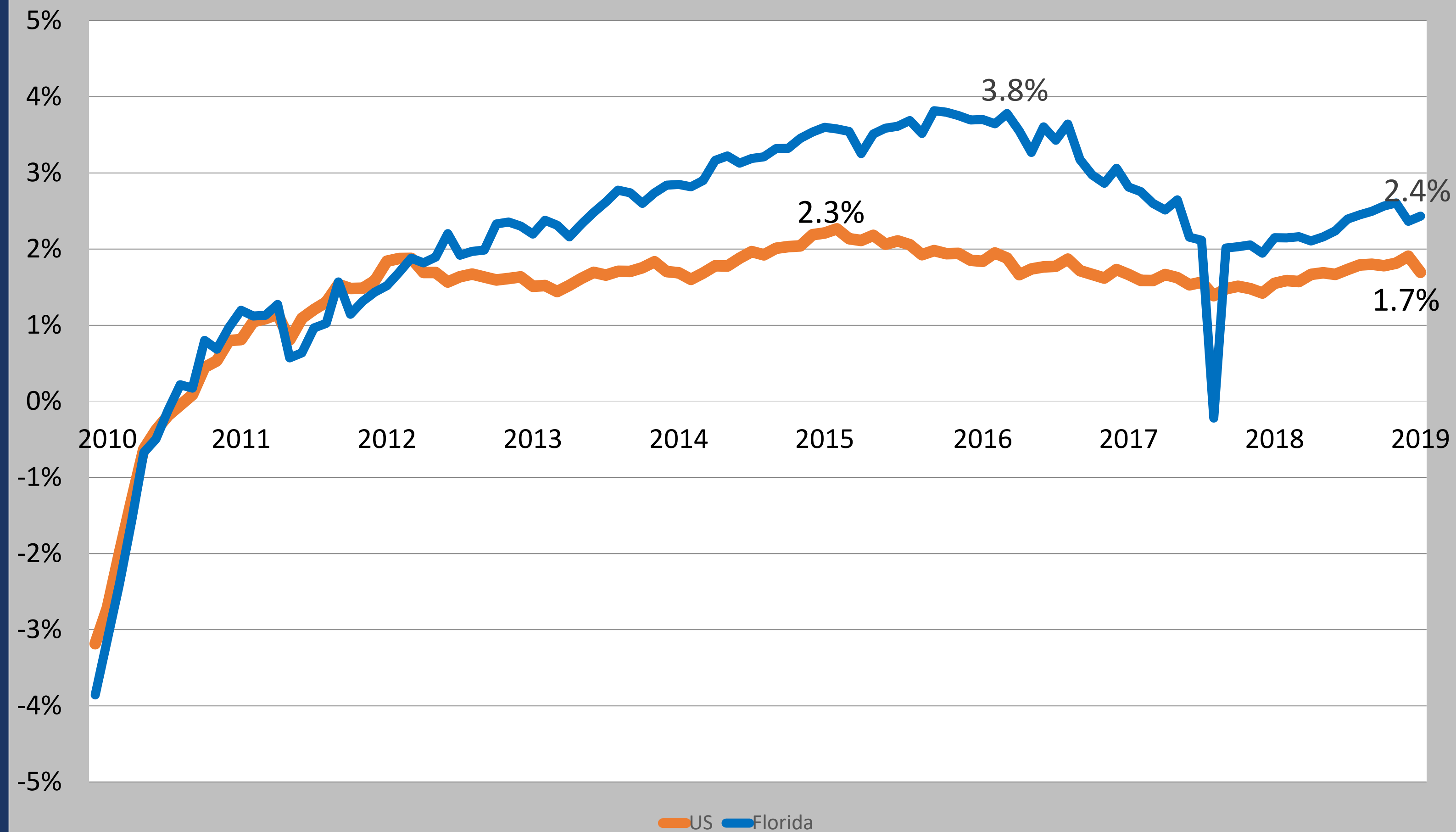
Florida At A Glance

- Florida's Economy \$1 Trillion GDP
 - 17th Largest In The World
- 21.5 Million Residents
 - 3rd / 26M By 2030 / More Than 900/Day
- 126.1 Million Visitors In 2018
- Florida Creates 1 Out Of Every 13 Jobs In The Nation
- 286,300 Jobs Looking for People. 360,000 People Looking for Jobs.

www.TheFloridaScorecard.org



Job Growth Rates - Florida versus U.S.



Job Creation

March 2018 – March 2019

U.S. Growth Rate 1.7%

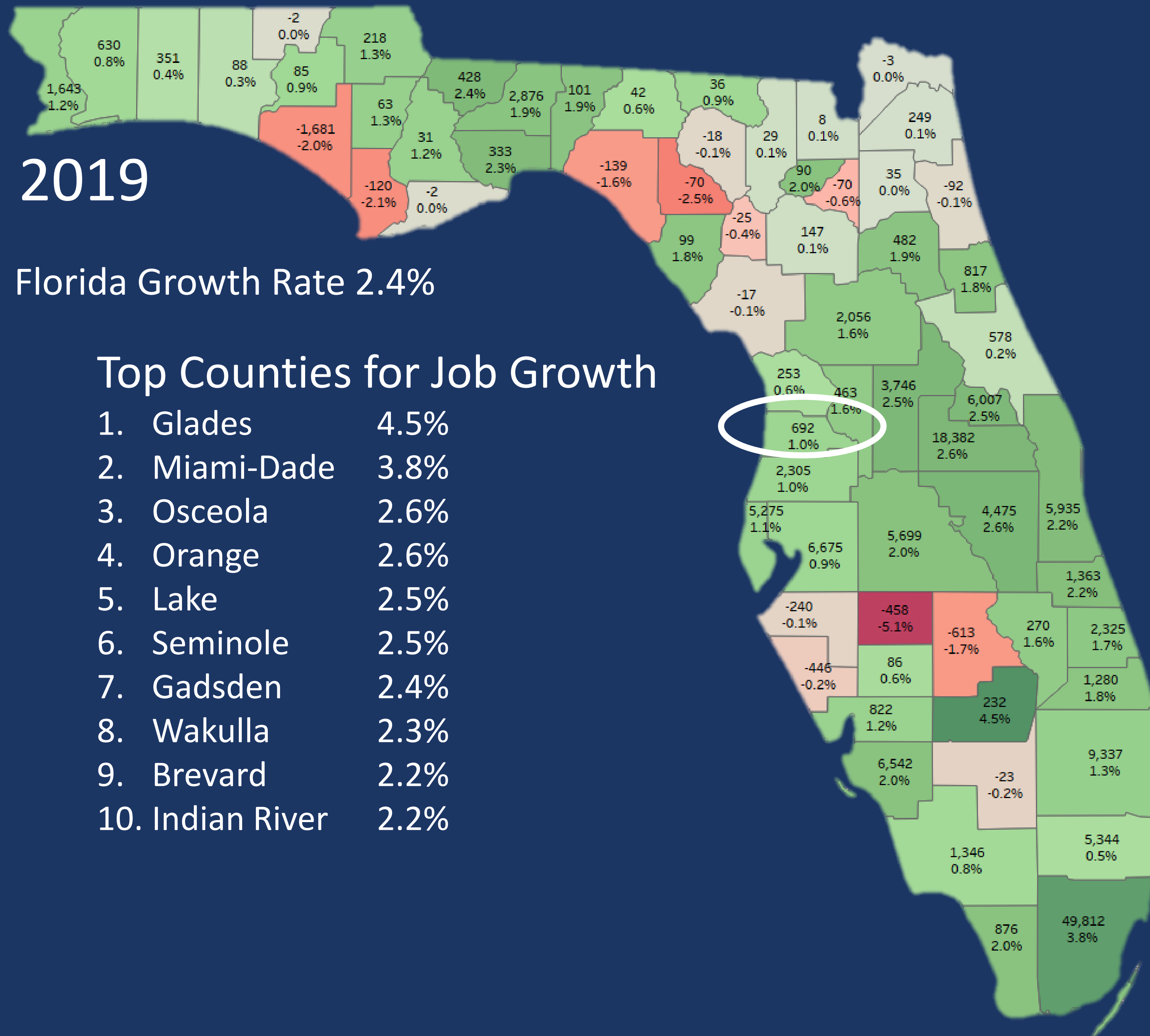
Florida Growth Rate 2.4%

Top Counties for Jobs

1. Miami-Dade	49,812
2. Orange	18,382
3. Palm Beach	9,337
4. Hillsborough	6,675
5. Lee	6,542
6. Seminole	6,007
7. Brevard	5,935
8. Polk	5,699
9. Broward	5,344
10. Pinellas	5,275

Top Counties for Job Growth

1. Glades	4.5%
2. Miami-Dade	3.8%
3. Osceola	2.6%
4. Orange	2.6%
5. Lake	2.5%
6. Seminole	2.5%
7. Gadsden	2.4%
8. Wakulla	2.3%
9. Brevard	2.2%
10. Indian River	2.2%



ion
2018
10.1%
e: 11.2%

counties lost jobs during this
6% of counties outside of Florida.

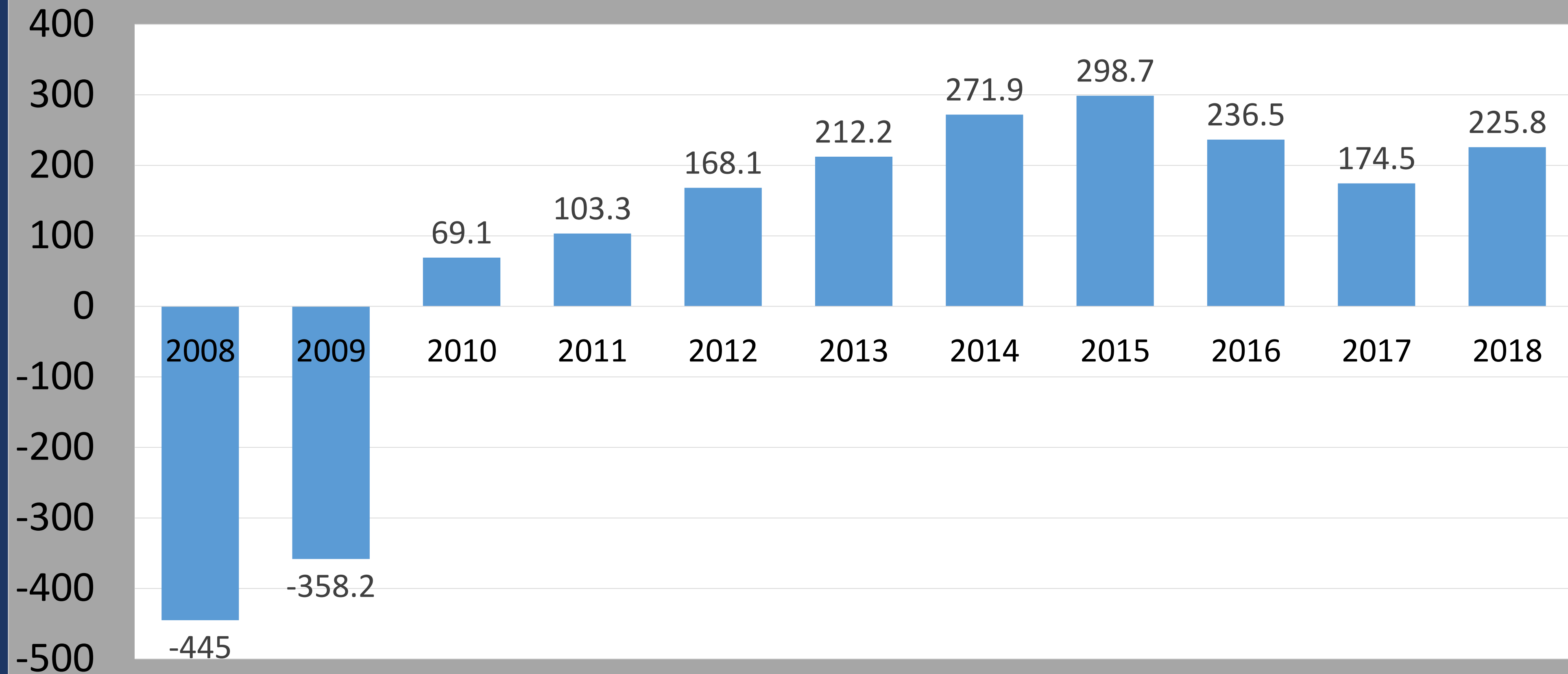
es lost jobs during this period.
orida's counties.

County	Jobs Lost/Gained	Percentage Change
Alachua	7,154	6.6%
Baker	6,822	26.5%
Bay	1,930	2.9%
Brevard	6,270	35.9%
Calhoun	-230	-10.4%
Charlotte	-112	-2.6%
Clay	871	9.8%
Collier	18	0.9%
Columbia	-222	-2.3%
DeSoto	5,708	5.9%
Duval	-194	-8.9%
Escambia	-54	-1.8%
Flagler	-300	-13.2%
Franklin	210	2.4%
Gadsden	1,016	5.8%
Hamilton	114	2.3%
Hardee	4,730	31.6%
Hendry	47,480	11.5%
Hernando	8,229	13.8%
Highway	-803	-43.1%
Holmes	13	0.3%
Indian River	-216	-4.0%
Jefferson	-388	-35.9%
Lake	109	4.2%
Lalor	145	6.1%
Lee	-50	-2.9%
Levy	378	19.1%
Liberty	8,954	10.3%
Madison	-19	-1.2%
Manatee	-220	-4.7%
Marion	-1,974	-13.5%
Meigs	5,459	37.4%
Monroe	98	1.4%
Murphy	1,662	1.9%
Nassau	-1,054	-3.6%
Nelson	15,187	21.8%
Okaloosa	18,225	11.4%
Okeechobee	146,491	23.5%
Osceola	11,165	7.8%
Otwell	18,593	22.0%
Palm Beach	41	0.0%
Palm Bay	34,524	6.0%
Palm Jumper	14,602	8.2%
Palm Springs	20,665	33.8%
Panama	12,943	7.4%
Polk	2,799	6.4%
Putnam	500	5.7%
Quitman	5,476	9.4%
St. Johns	6,757	12.4%
St. Joseph	40,000	8.1%
St. Leon	56,241	8.7%
St. Lucie	135,337	15.6%
St. Mary	4,782	16.3%
St. Paul	9,738	8.2%
St. Peter	-695	-7.1%
St. Thomas	29,364	15.7%
St. Vincent	4,369	12.1%
St. Xavier	232	3.5%
St. Yvonne	245	26.4%
St. Zeph	13,921	9.9%
St. Zeph	-3,718	-3.3%
St. Zeph	-1,712	-26.0%
St. Zeph	-1,496	-6.1%
St. Zeph	5,429	16.7%
St. Zeph	18,400	52.5%

Florida Growth Rate: 11.2%

Florida – 18 counties lost jobs during this period.
That is 26.8% of Florida's counties.

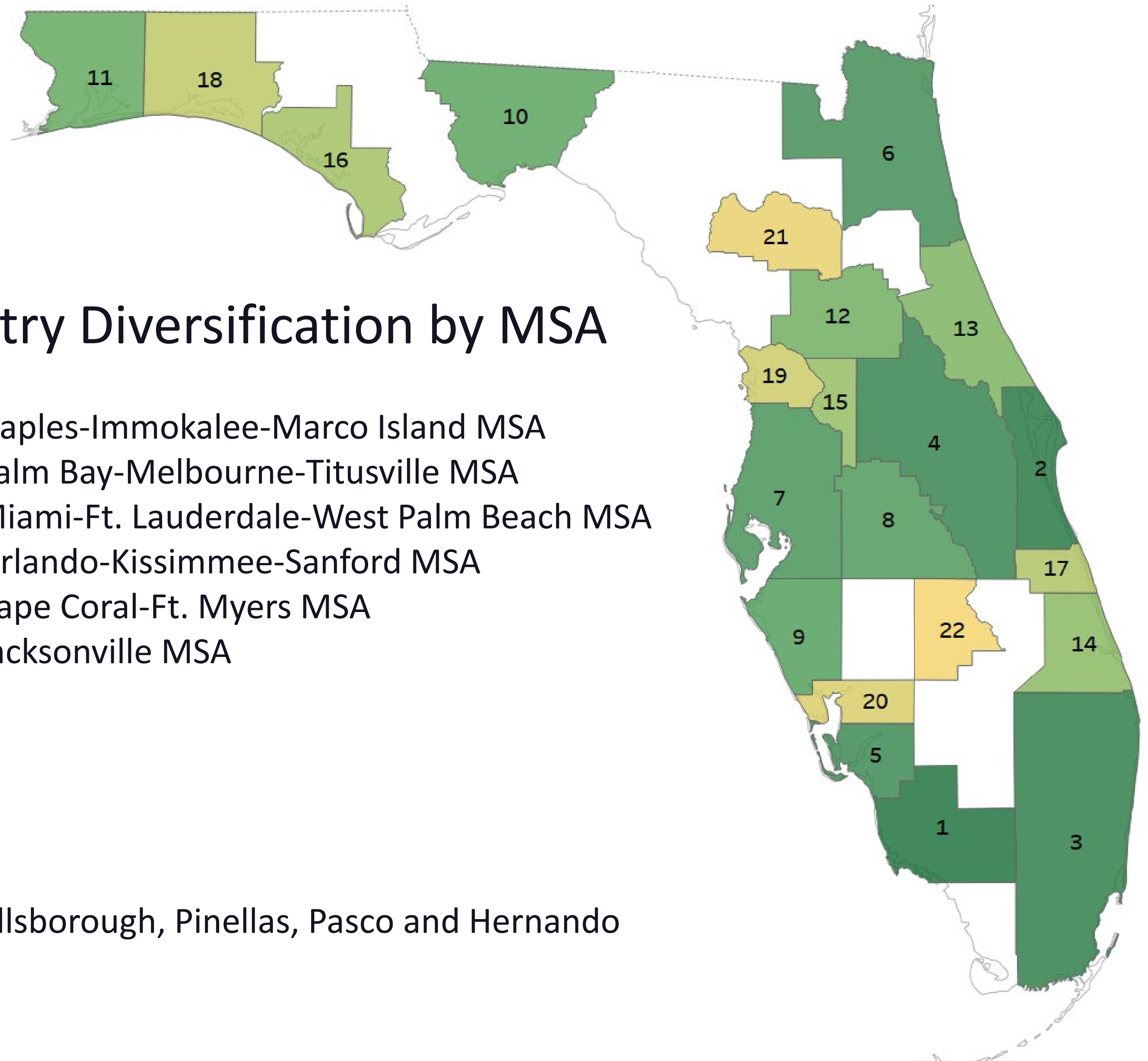
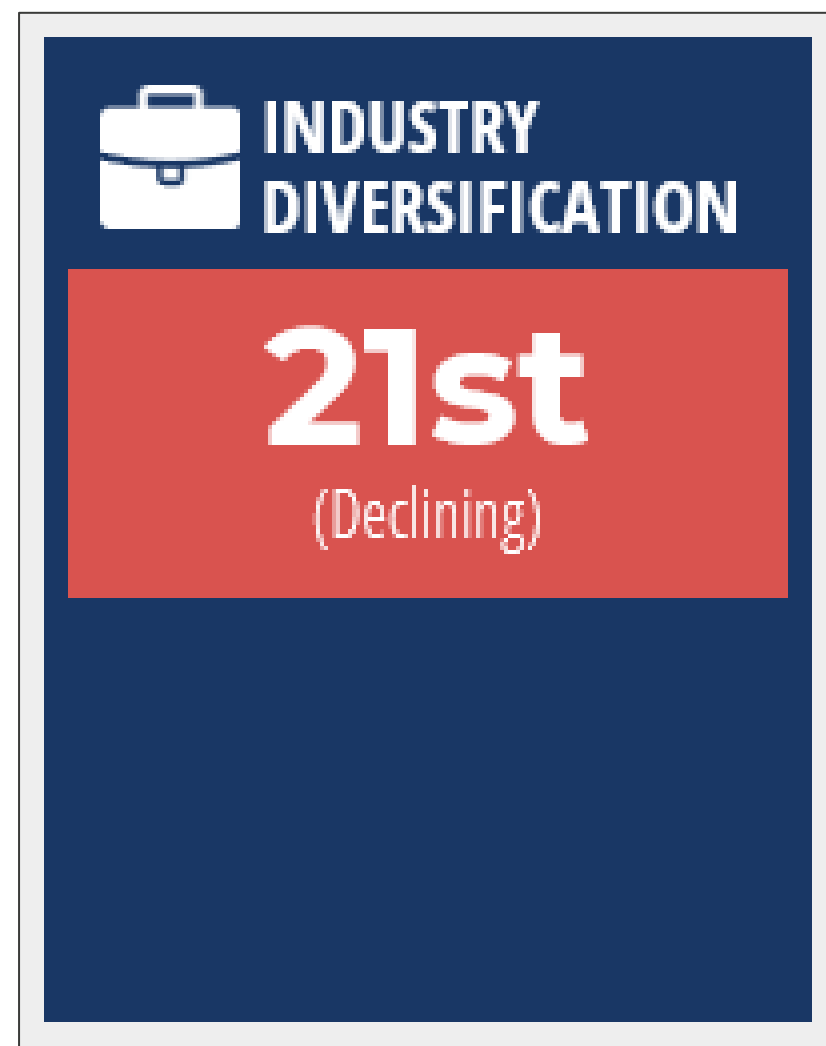
Yearly Florida Job Creation (thousands)



2019 Forecasts

1. Jobs Created – 150,000
2. Population Increase – 330,000
3. Top Industry Growth Rates:
 1. Construction
 2. Professional & Business Services
 3. Health Services

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

Tampa Bay MSA: Hillsborough, Pinellas, Pasco and Hernando
Q3 2018 data

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



UNEMPLOYMENT RATE 4.7%	CRIME RATE 88.2	TOTAL STATE REVENUE \$89.1	TOTAL STATE DEBT 6,255
POPULATION 259,800		GDP 106.0	HOUSING UNITS 24,083
STATE TREASURY REVENUE 2,178	STATE BUDGET \$805K	PERCENTAGE 16.6%	PERCENTAGE 77.8%

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

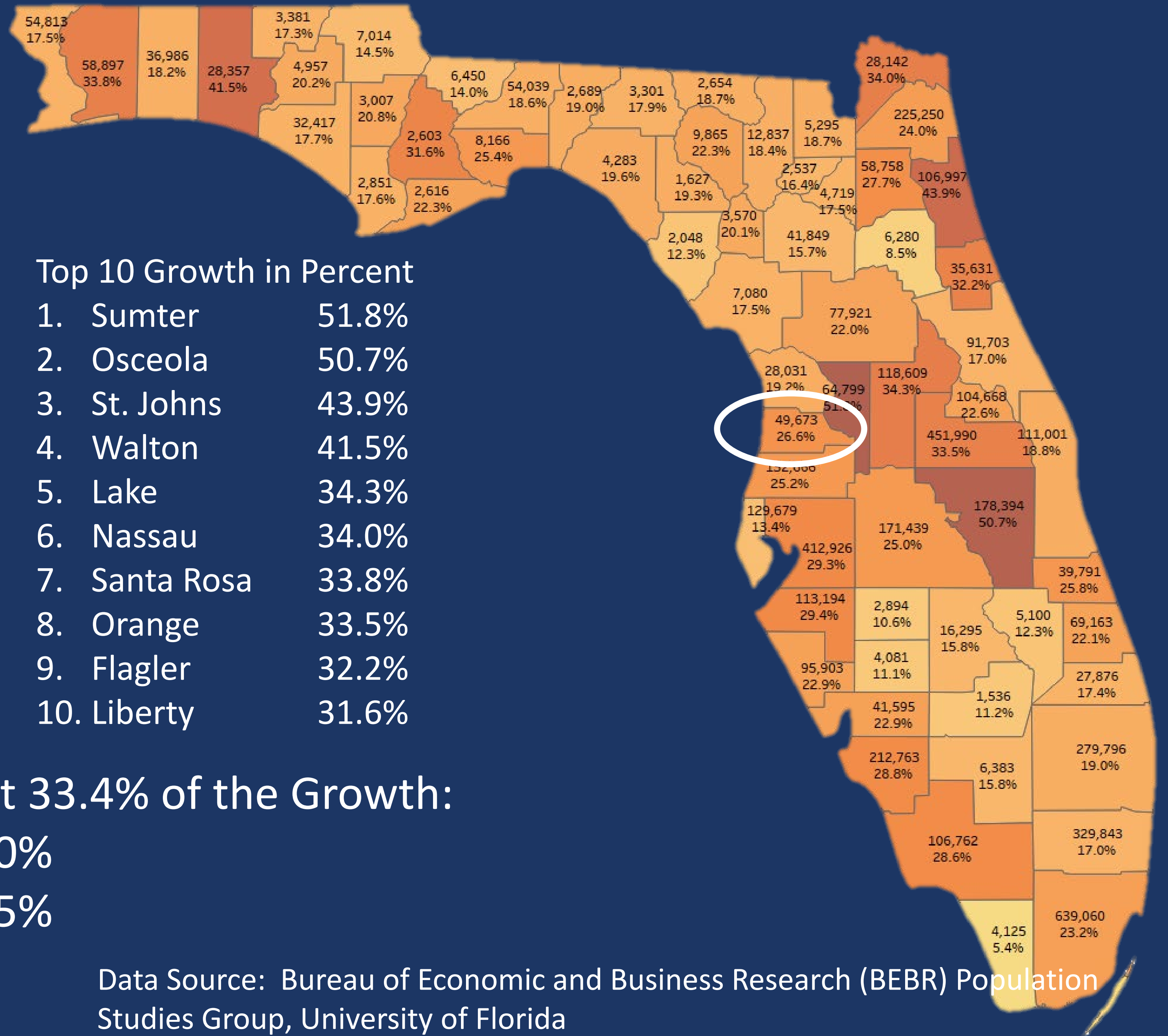
Top 10 Growth in Percent

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%

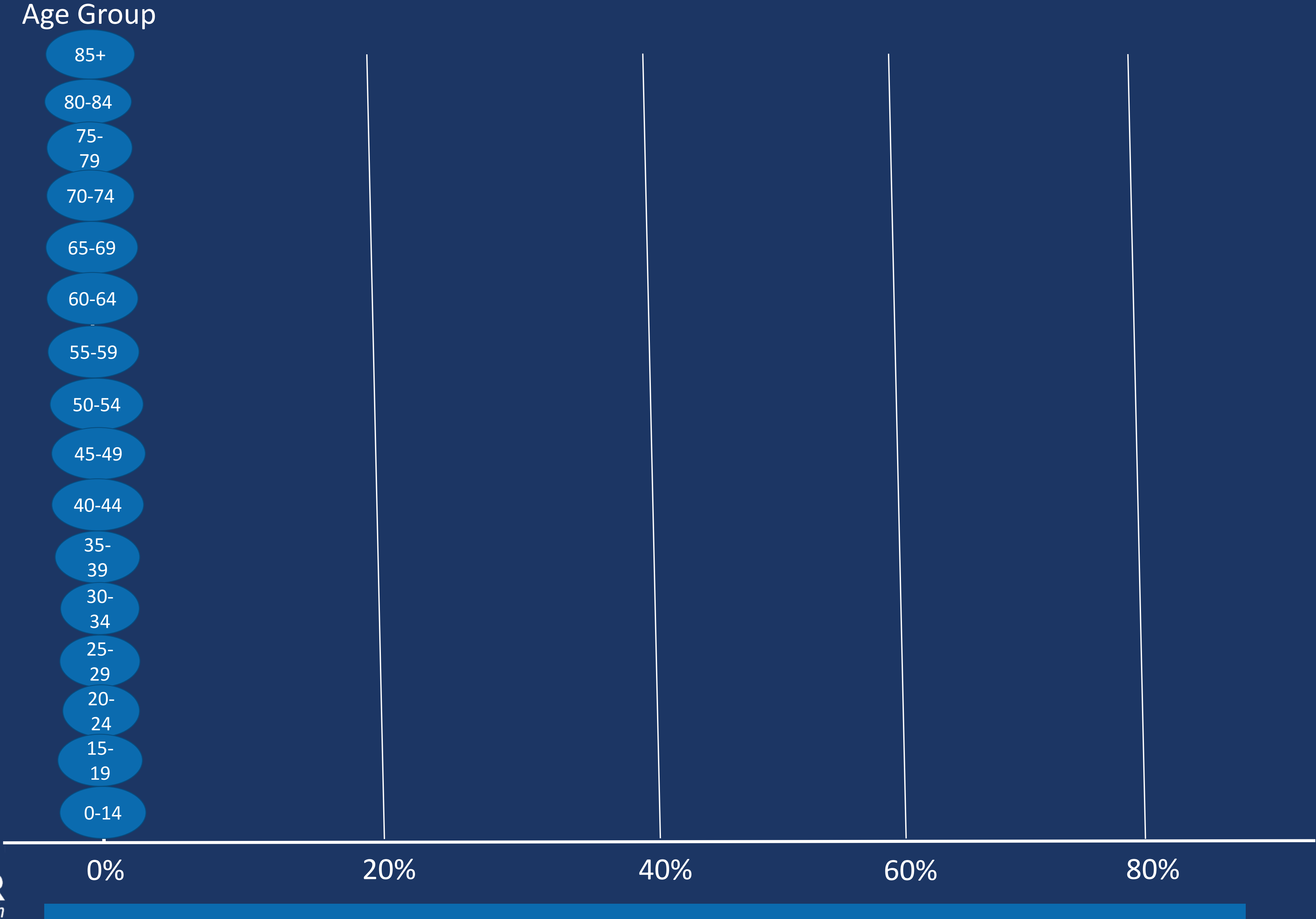
Top 3 Counties get 33.4% of the Growth:

Top 6: 52.0%

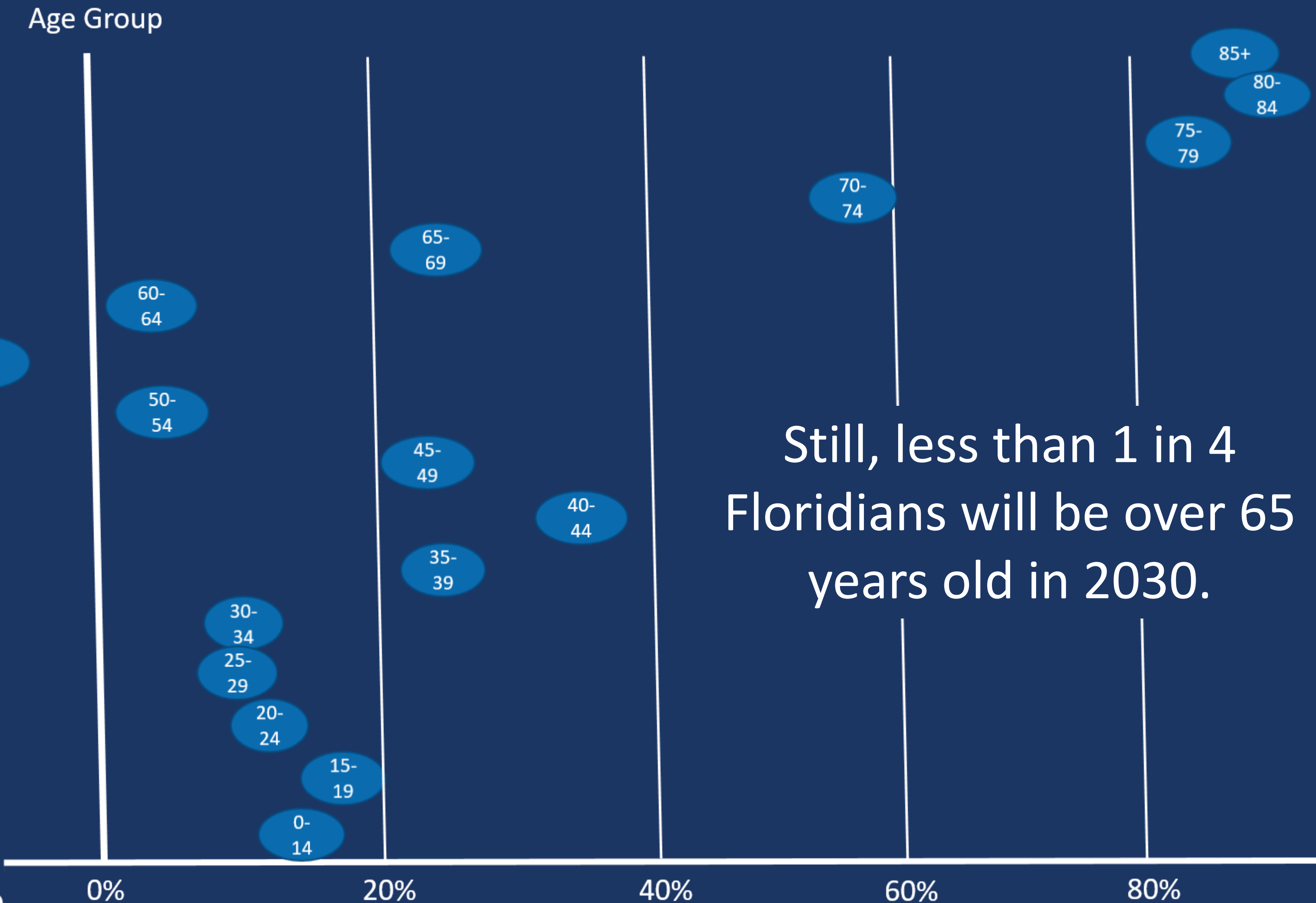
Top 13: 75.5%



Florida Growth to 2030 by Age Group

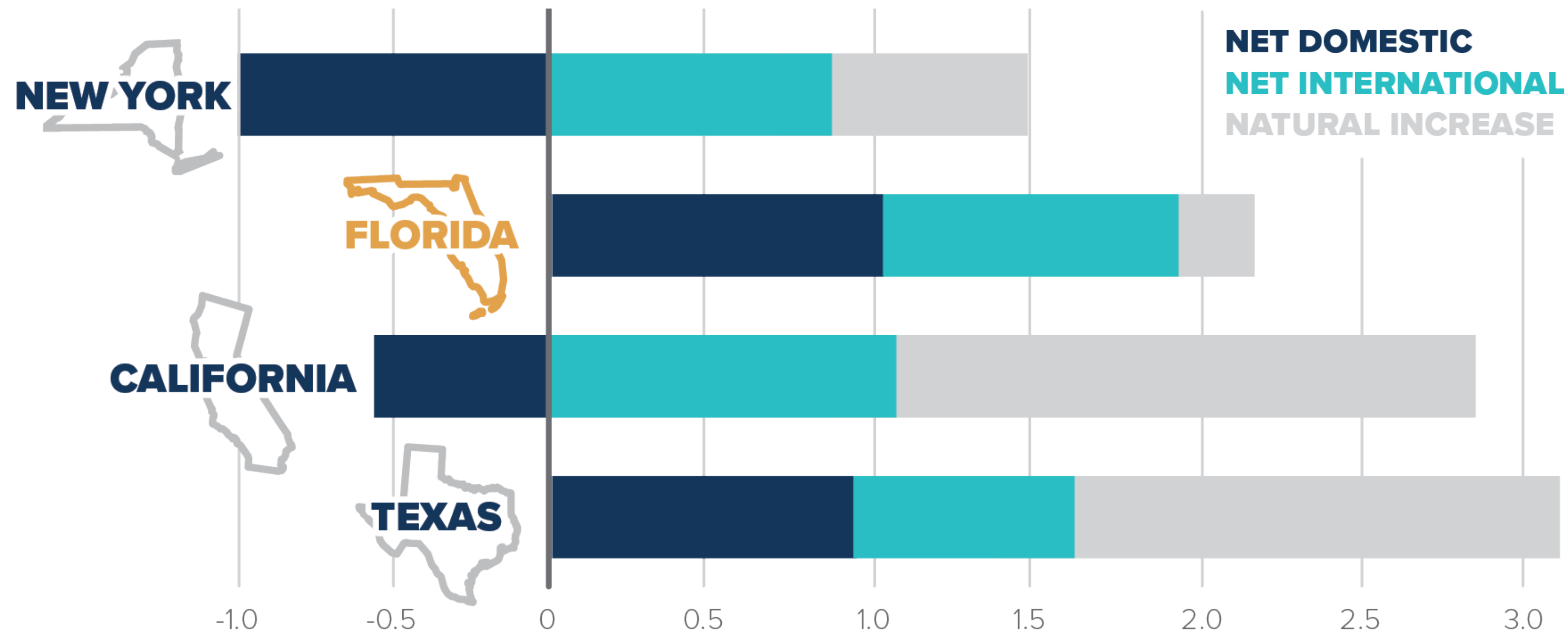


Florida Growth to 2030 by Age Group

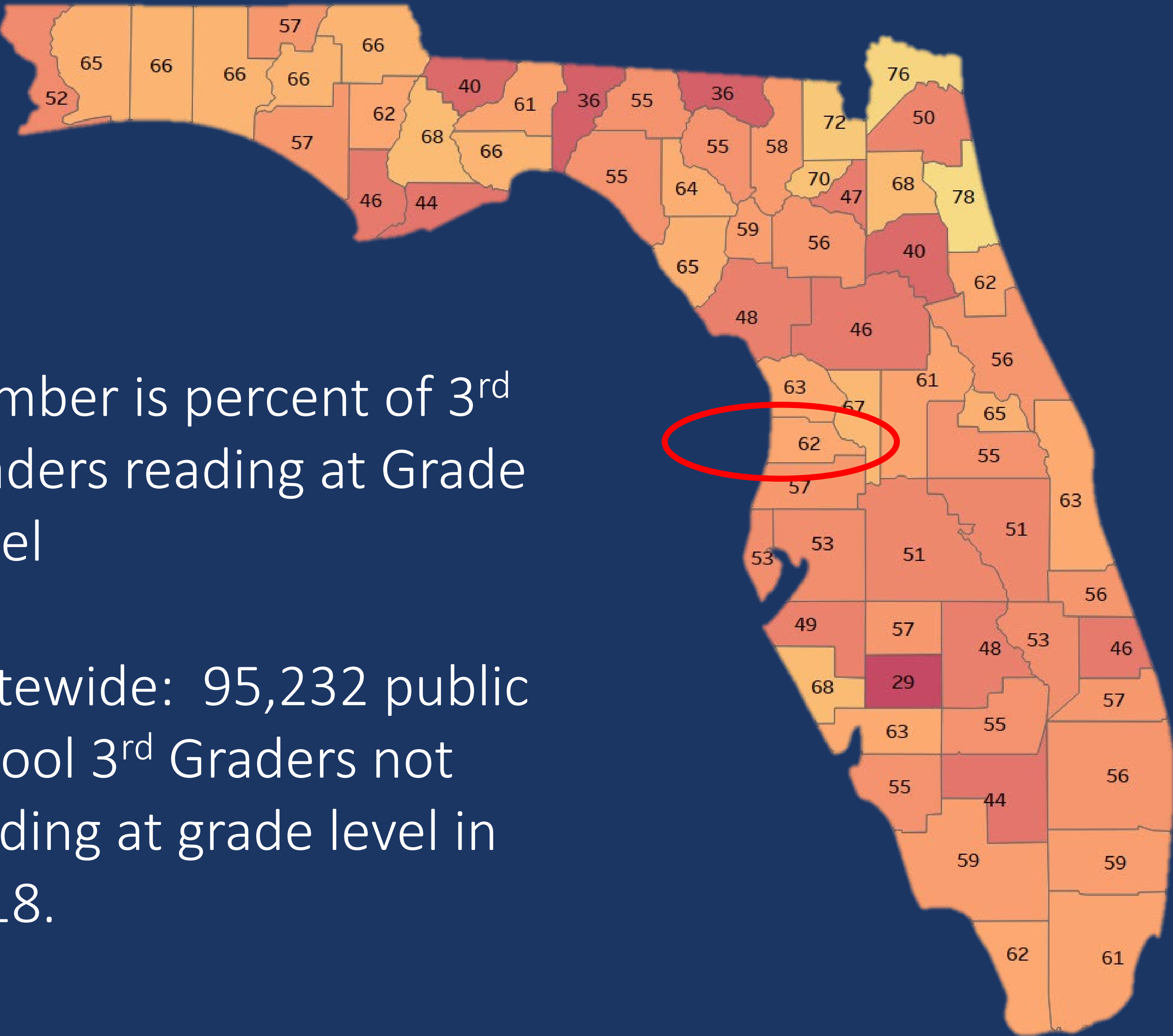


Still, less than 1 in 4
Floridians will be over 65
years old in 2030.

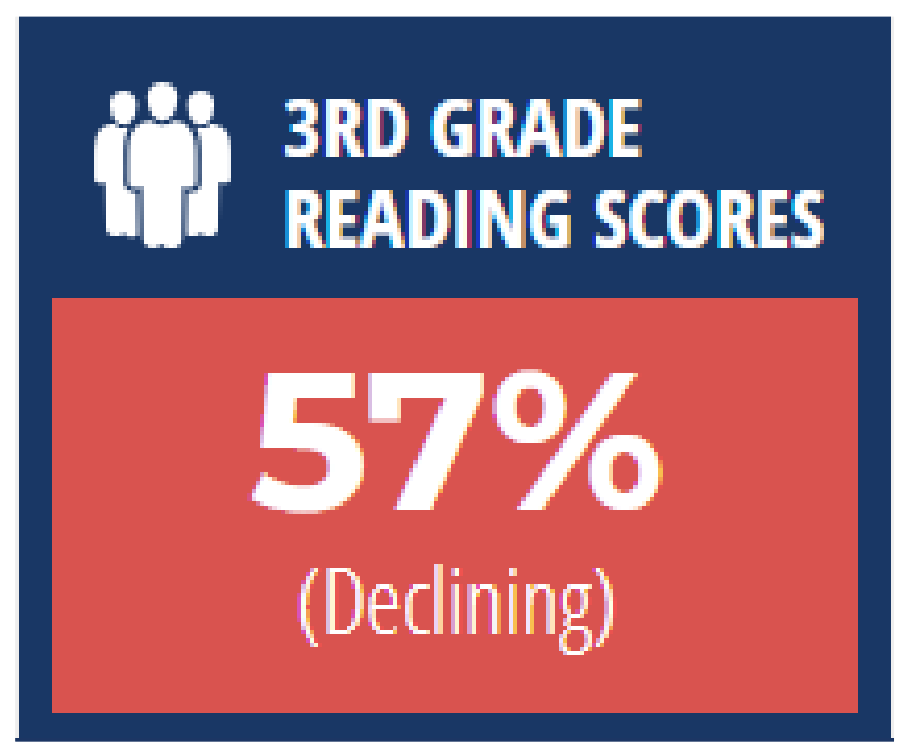
Where Does Florida's Growth Come From?



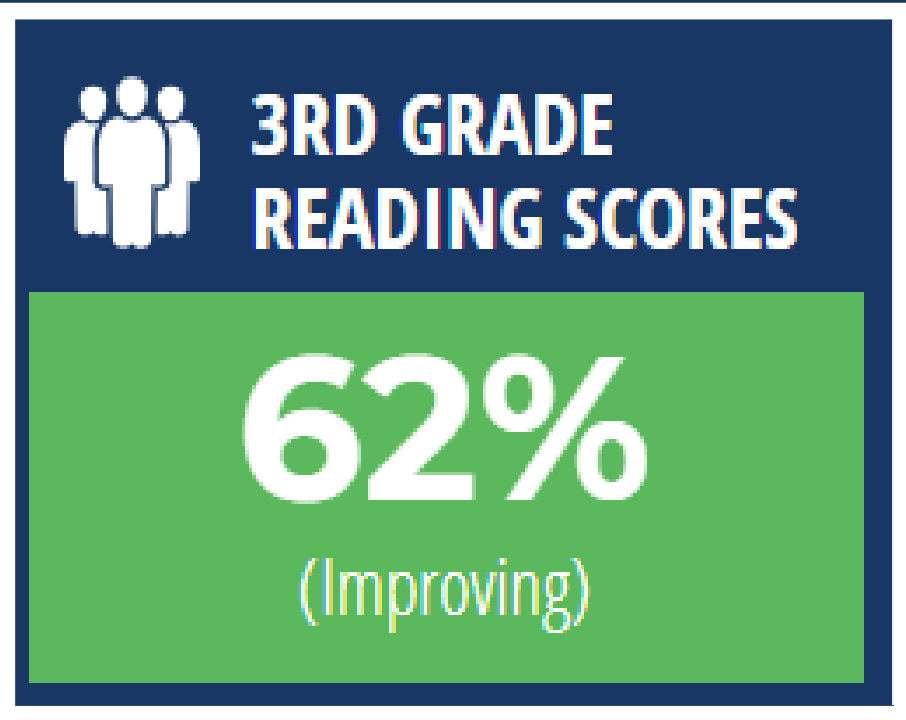
Florida's 3rd Grade Reading Scores



Florida



Hernando County



Number is percent of 3rd Graders reading at Grade Level

Statewide: 95,232 public school 3rd Graders not reading at grade level in 2018.

Under-18 Poverty in Florida

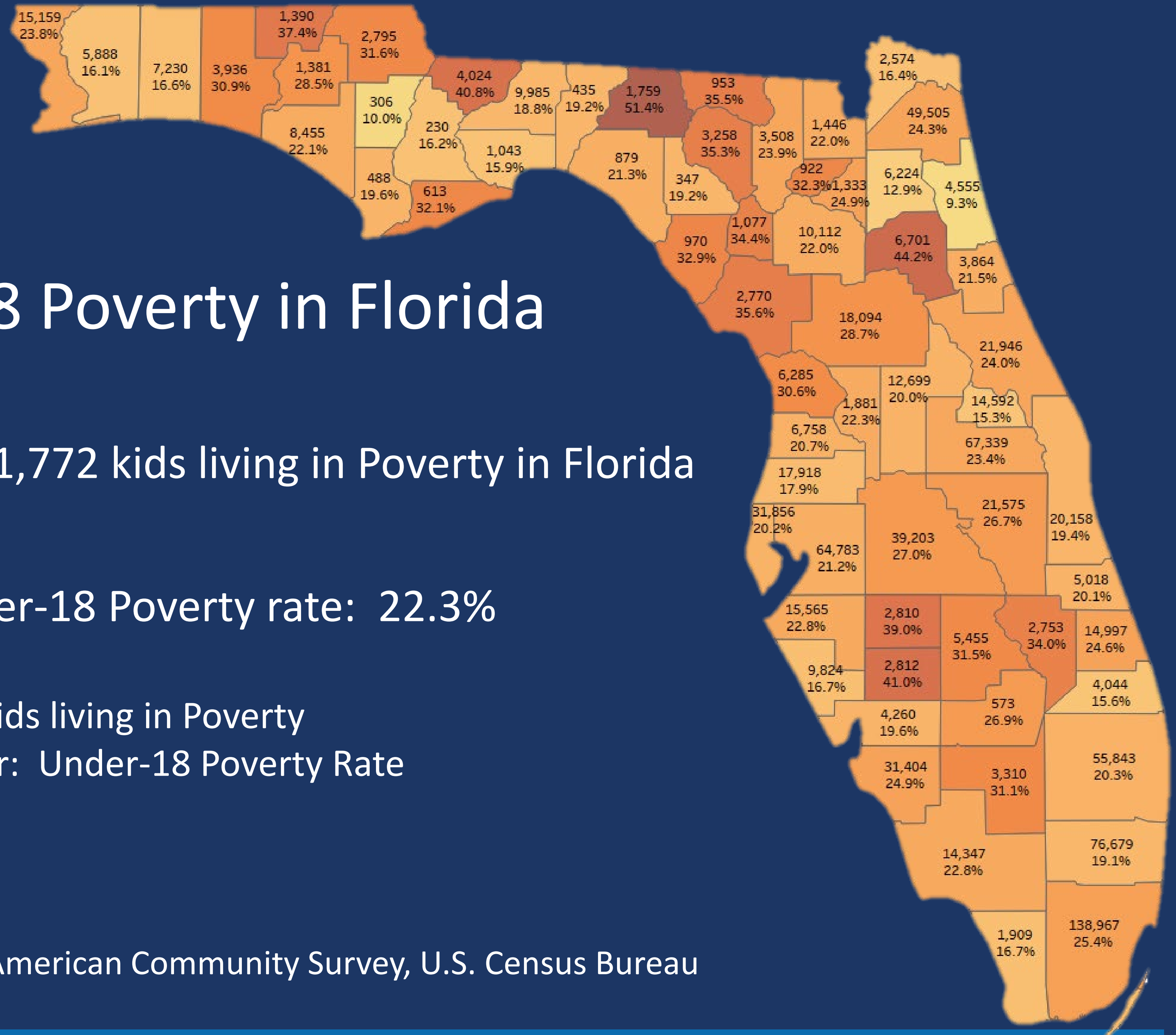
There are 901,772 kids living in Poverty in Florida

Florida's under-18 Poverty rate: 22.3%

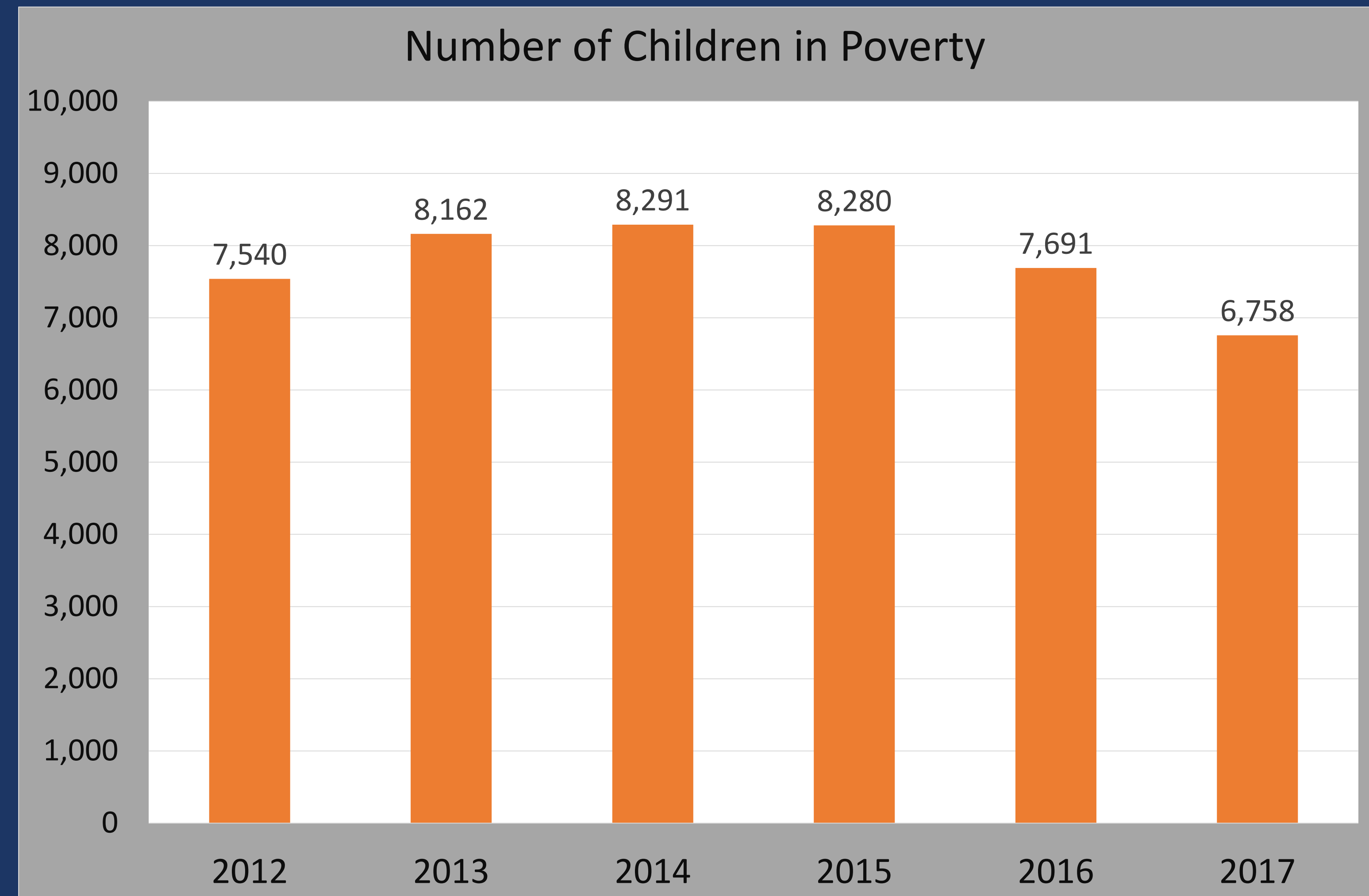
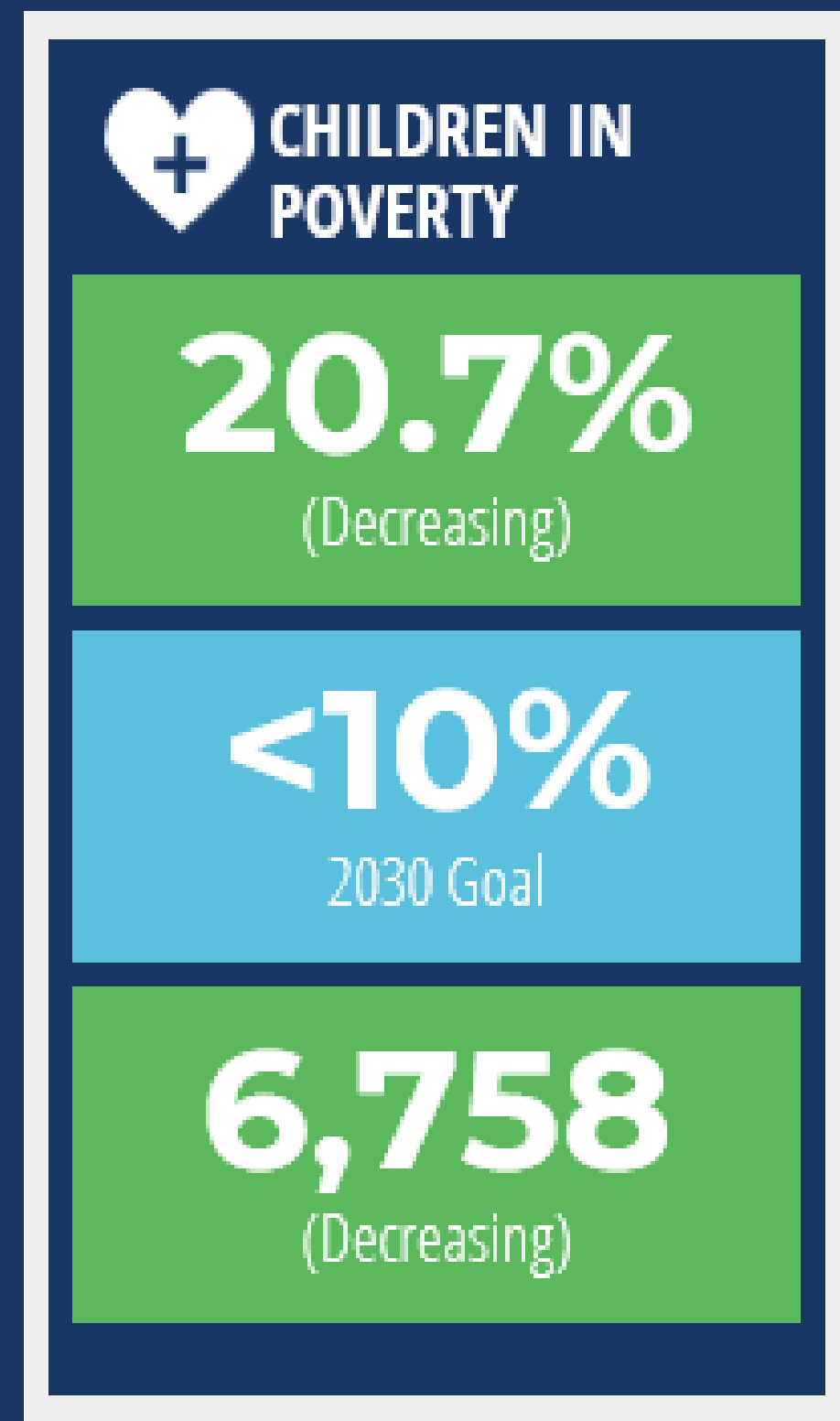
Top Number: Kids living in Poverty

Bottom Number: Under-18 Poverty Rate

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



Childhood Poverty in Hernando County



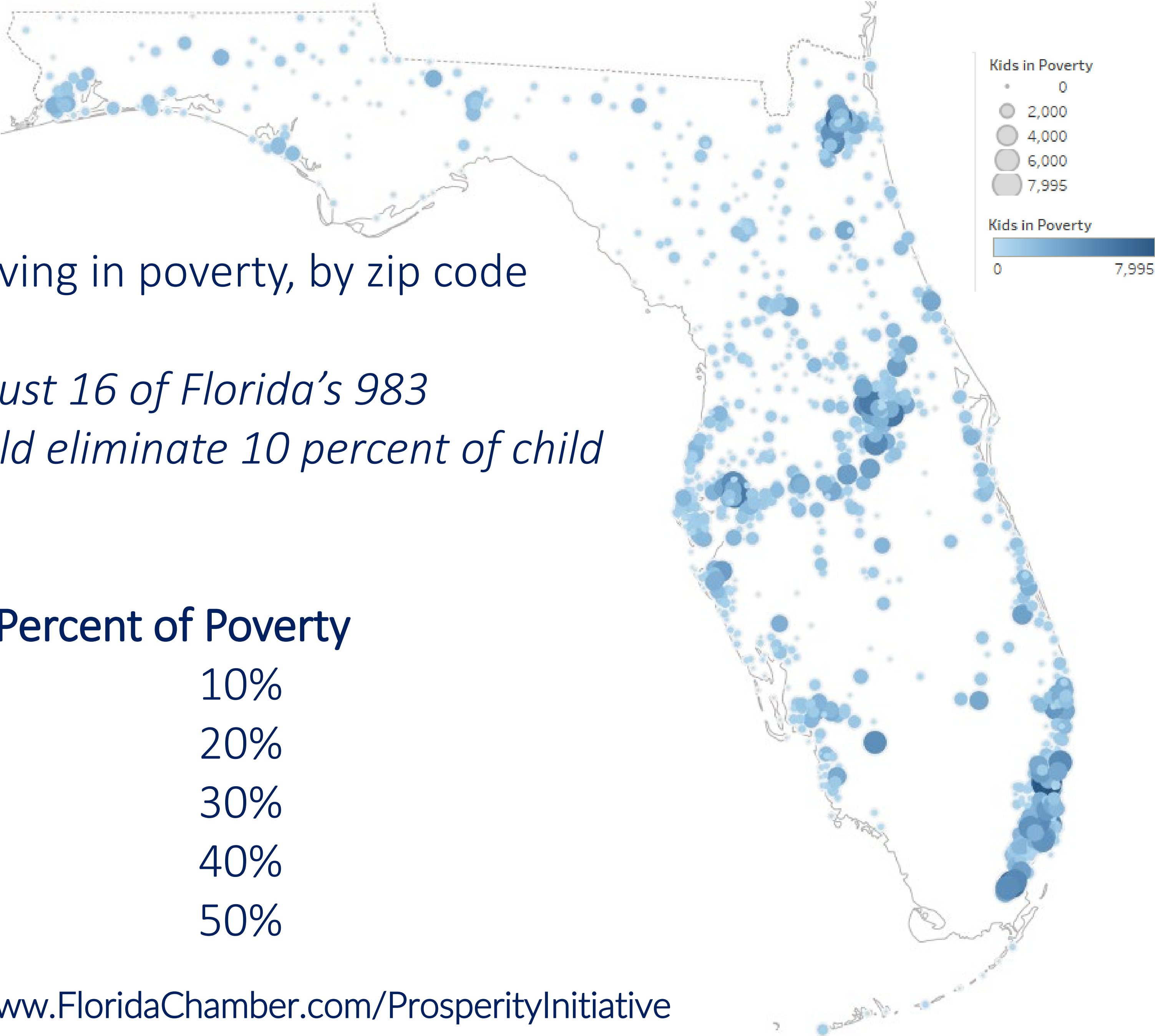
Kids in Poverty in Florida

901,772 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%

www.FloridaChamber.com/ProsperityInitiative



Metric	Florida	Hernando	Pasco	Citrus	Sarasota	Hillsborough	Pinellas
Population	21,500,000	186,553	525,643	154,647	419,119	1,408,566	970,637
2030 Est. Population	26,000,000	216,300-241,900	618,300-678,400	159,600-176,400	464,000-510,000	1,722,900-1,917,500	995,700
Unemployment Rate	3.5%	4.3%	3.6%	4.9%	3.2%	3.2%	3.1%
3 rd Grade Reading	57%	62%	57%	63%	68%	53%	53%
High School Graduation	86.1%	87.6%	86.7%	84.1%	89.8%	85.8%	86%
Poverty Rate	15.5%	14.3%	13.6%	17.4%	10.5%	15.7%	13.7%
Kids in Poverty	901,772	6,758	17,900	6,285	9,824	64,783	31,856
Per Capita Income	\$46,858	\$34,413	\$37,083	\$36,200	\$59,013	\$43,803	\$49,186

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



“We won’t get the policies right until we get the politics right.” – Will Weatherford



2018 Election Results and Analysis

Florida's 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 Bill Galvano

Balance of Power

Senate – 23 R, 17 D

- 65% new since 2016

House – 73 R, 47 D

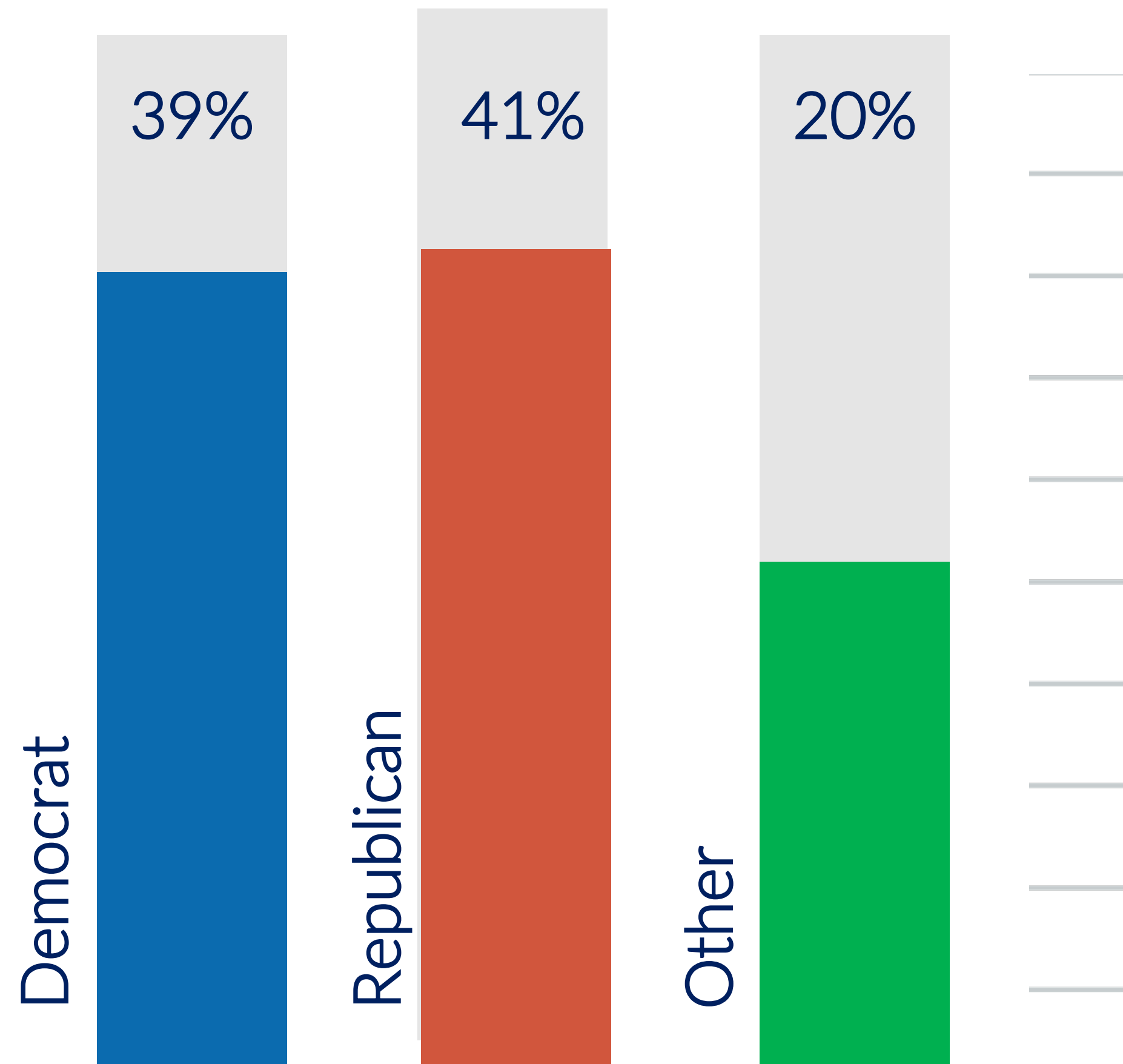
- 70% new since 2016

110 of 160 of the Legislature
have less than 2 years
experience



House Speaker José Oliva

2018 Voter Turnout By Party

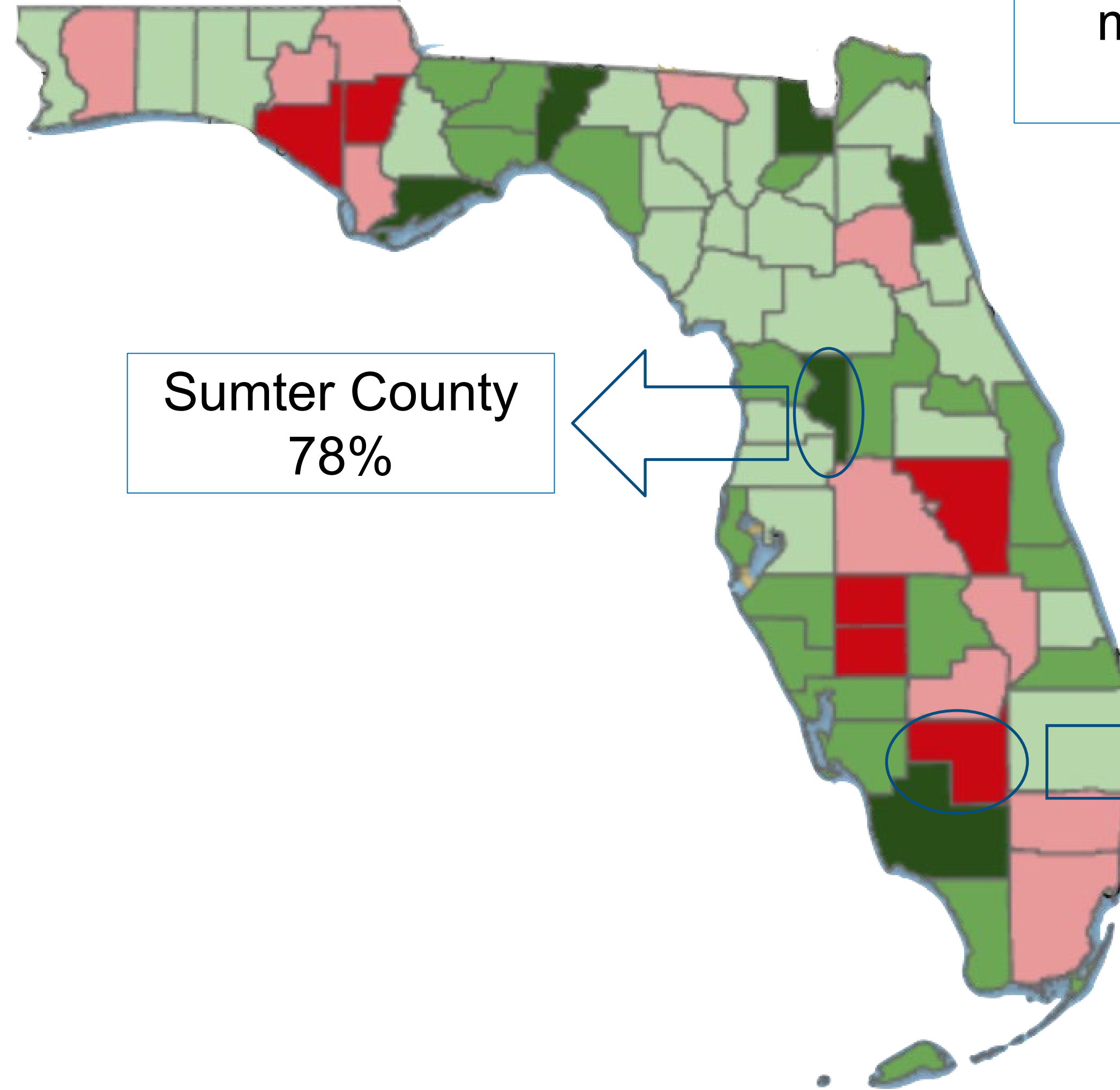
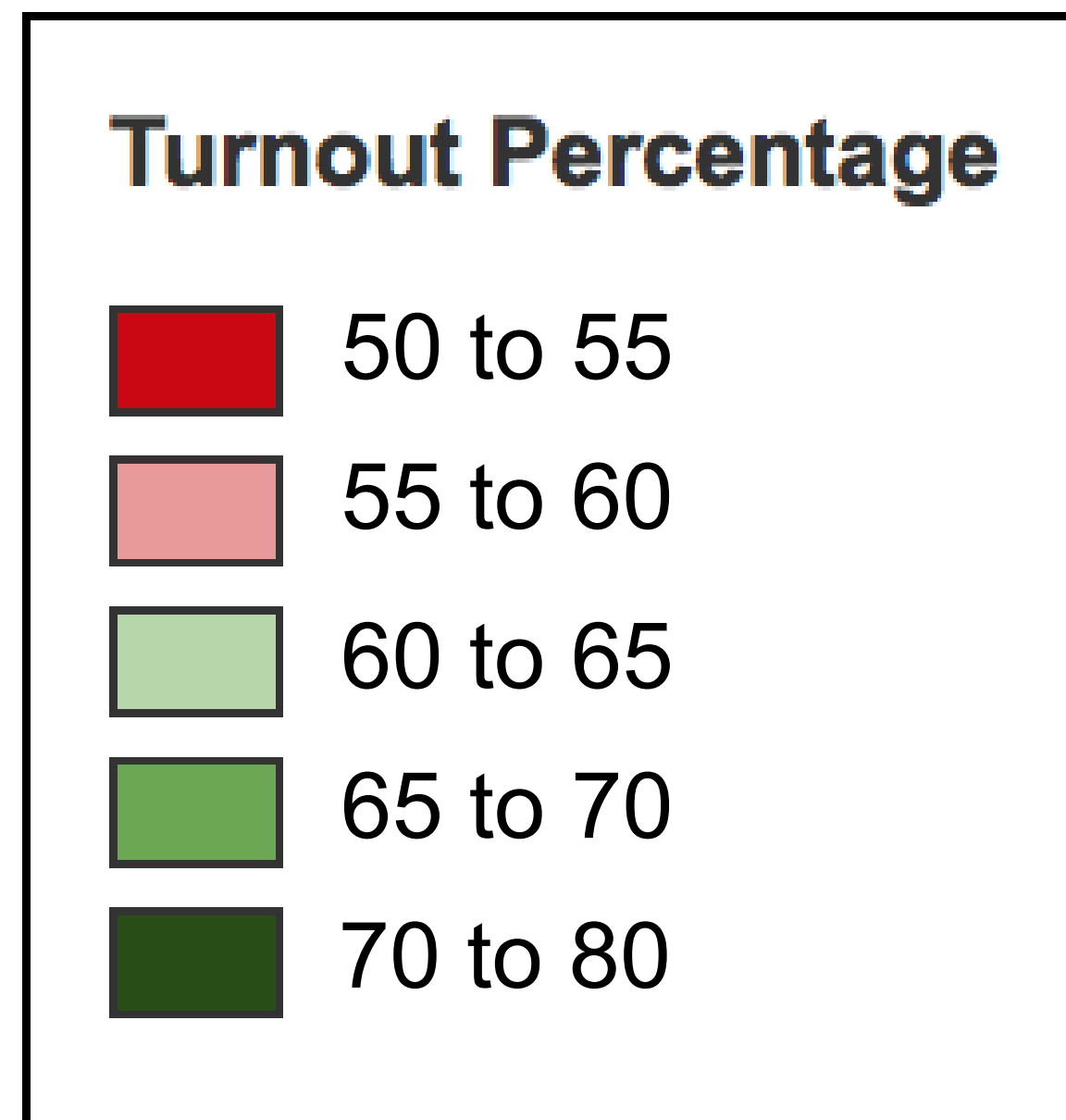


Why was Most Polling wrong in 2018?

- Most polling modeled NPA's higher than they have ever been in an election in Florida. One poll even had NPA above 30%
- Other polls modeled Democratic turnout closer to registration than how they usually perform in midterm elections (R+2 is the norm)

2018 Voter Turnout By County

8,318,824 out of 13,439,834
million Floridians voted
62%

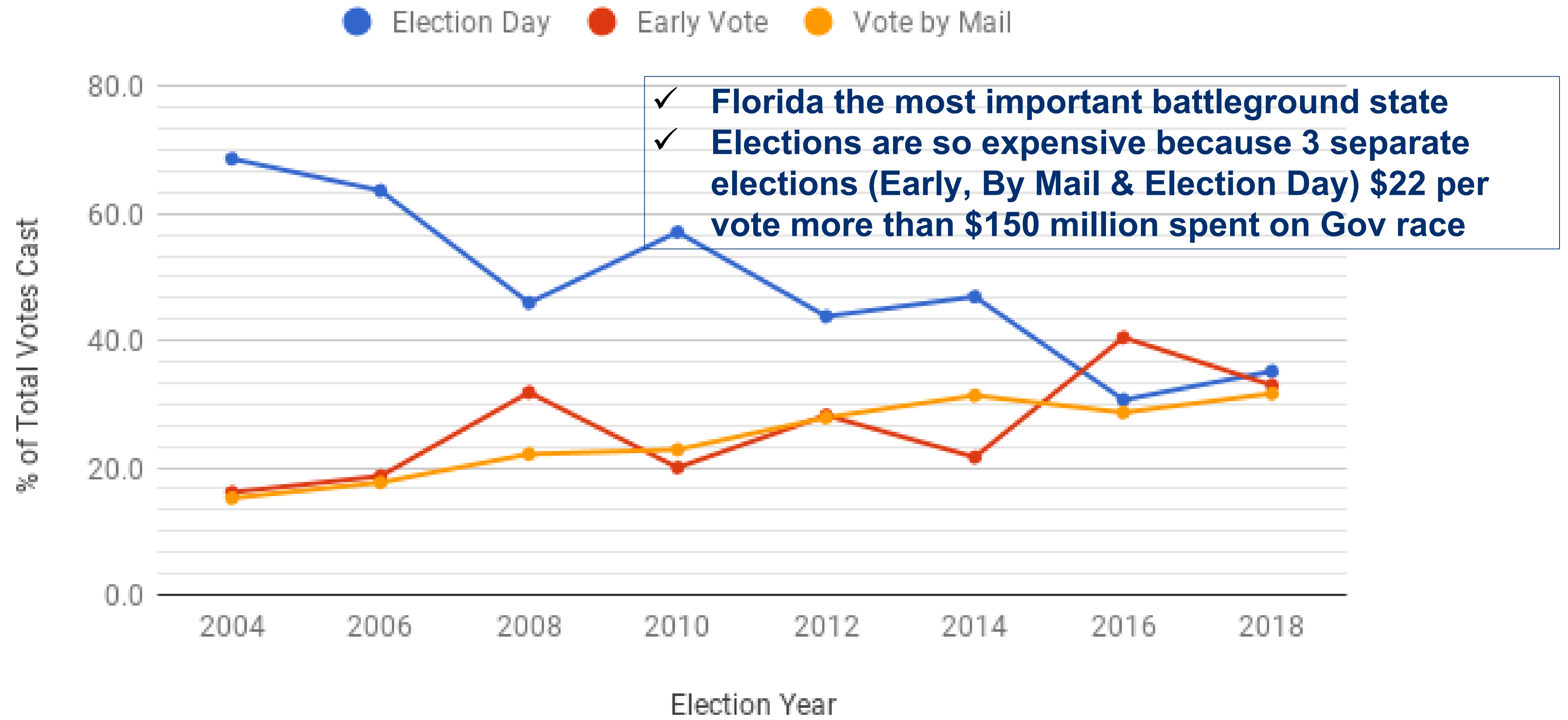


Sumter County
78%

Hendry County
50%

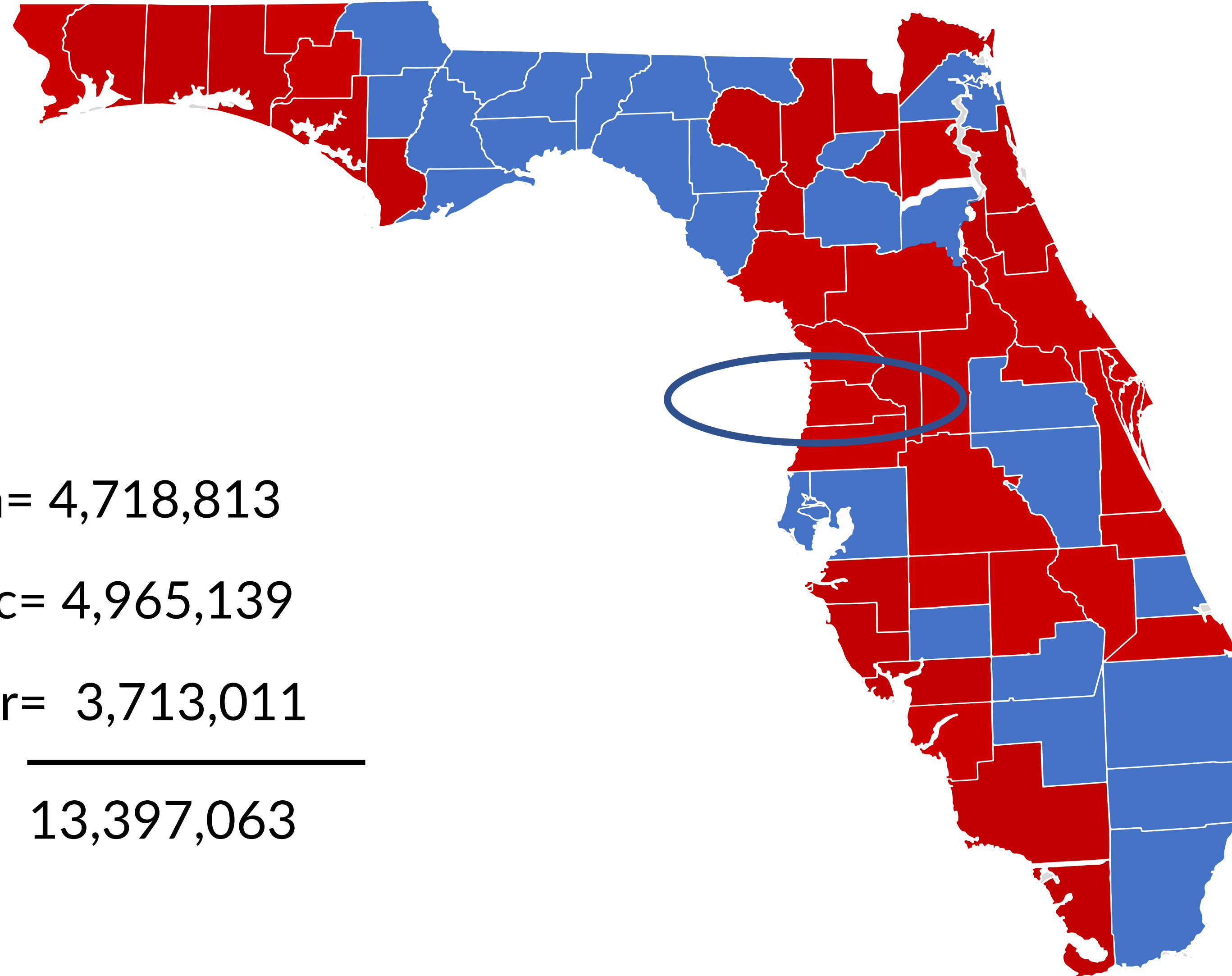
Florida's Electoral Changes and Forecast

Vote Share by Ballot Method



Total Voter Registration

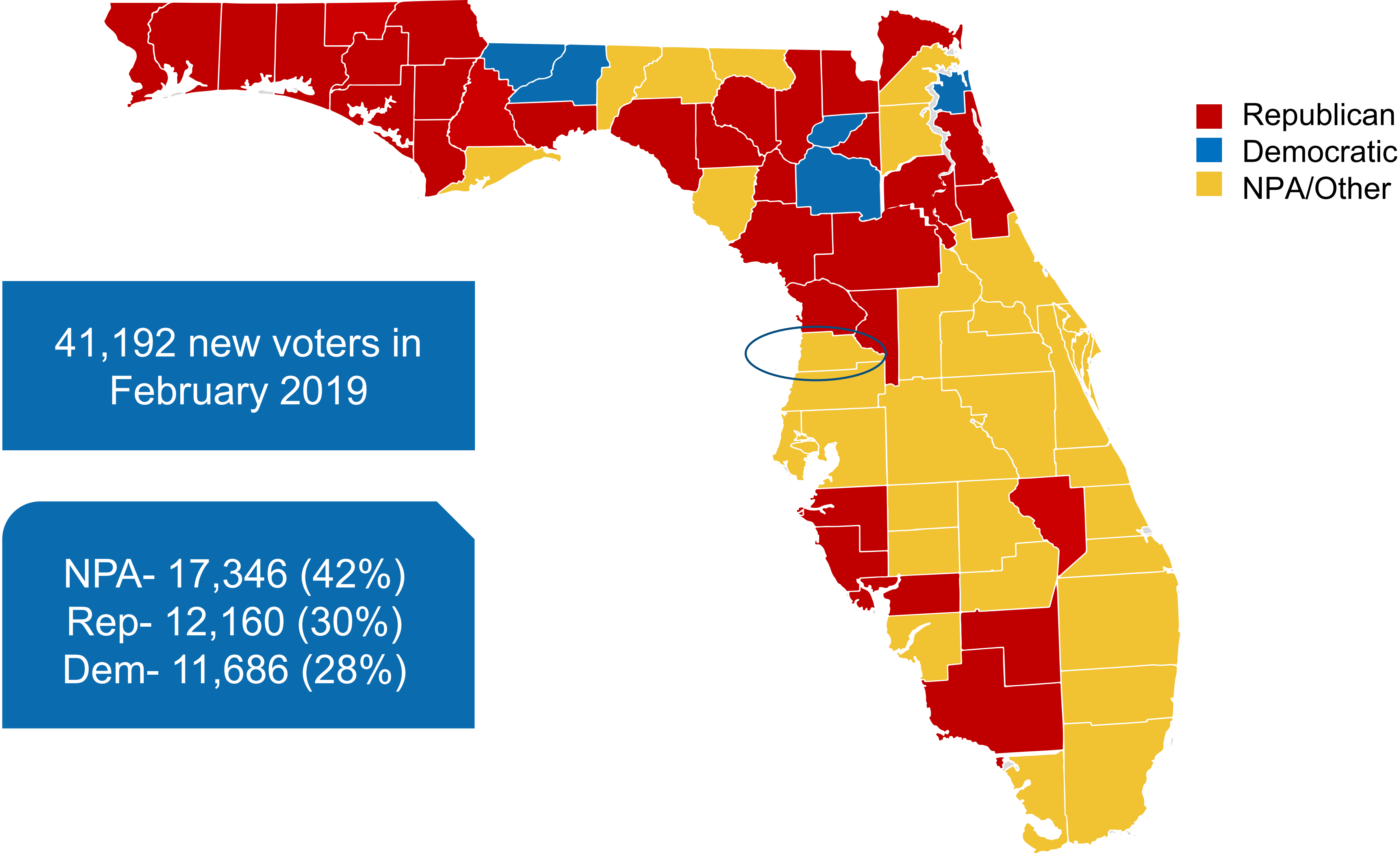
By County (41R, 26D)



■ Republican= 4,718,813
■ Democratic= 4,965,139
■ NPA/Other= 3,713,011

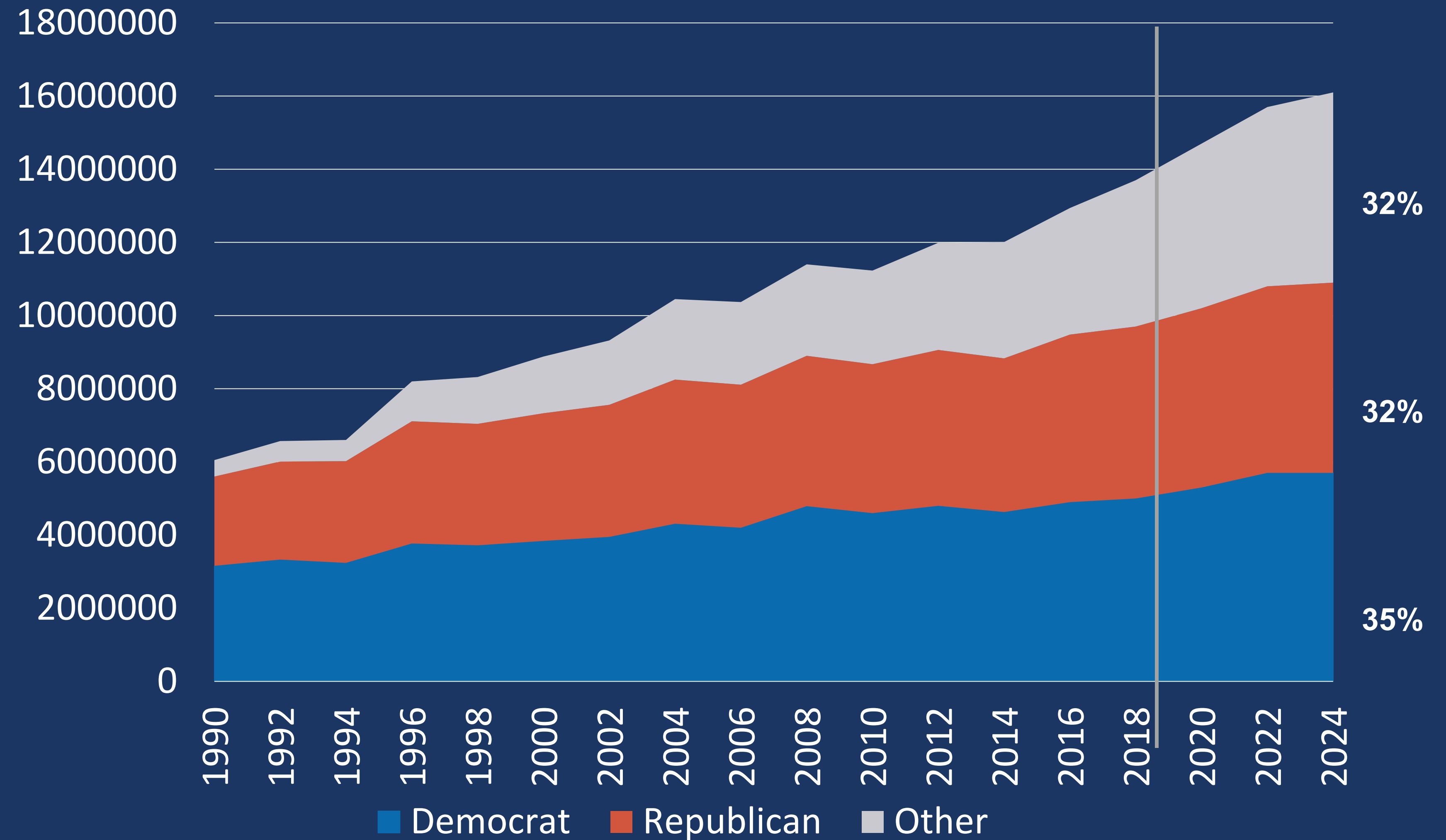
13,397,063

MARCH NEW VOTERS
By County



Voters Aren't Choosing Parties

Party
Registration
Projected
1990-2024





Florida Chamber's Latest Statewide Poll w/ Regional Insights

Changing Voter Attitudes

Statewide	54:25
Jacksonville	62:22
Gainesville	46:38
Tallahassee	50:31
Panama City/Pensacola	55:25
Orlando/Daytona	53:22
Tampa/St. Pete	56:24
Ft. Myers/Naples	61:25
Broward/Miami	52:27
Palm Beach	48:28

Statewide	54:25
Men	59:24
Women	50:26
Republicans	77:9
Democrats	34:43
Others	48:21
White	59:22
African- American	27:48
Hispanic	61:18

Top Voter Concerns by Media Market

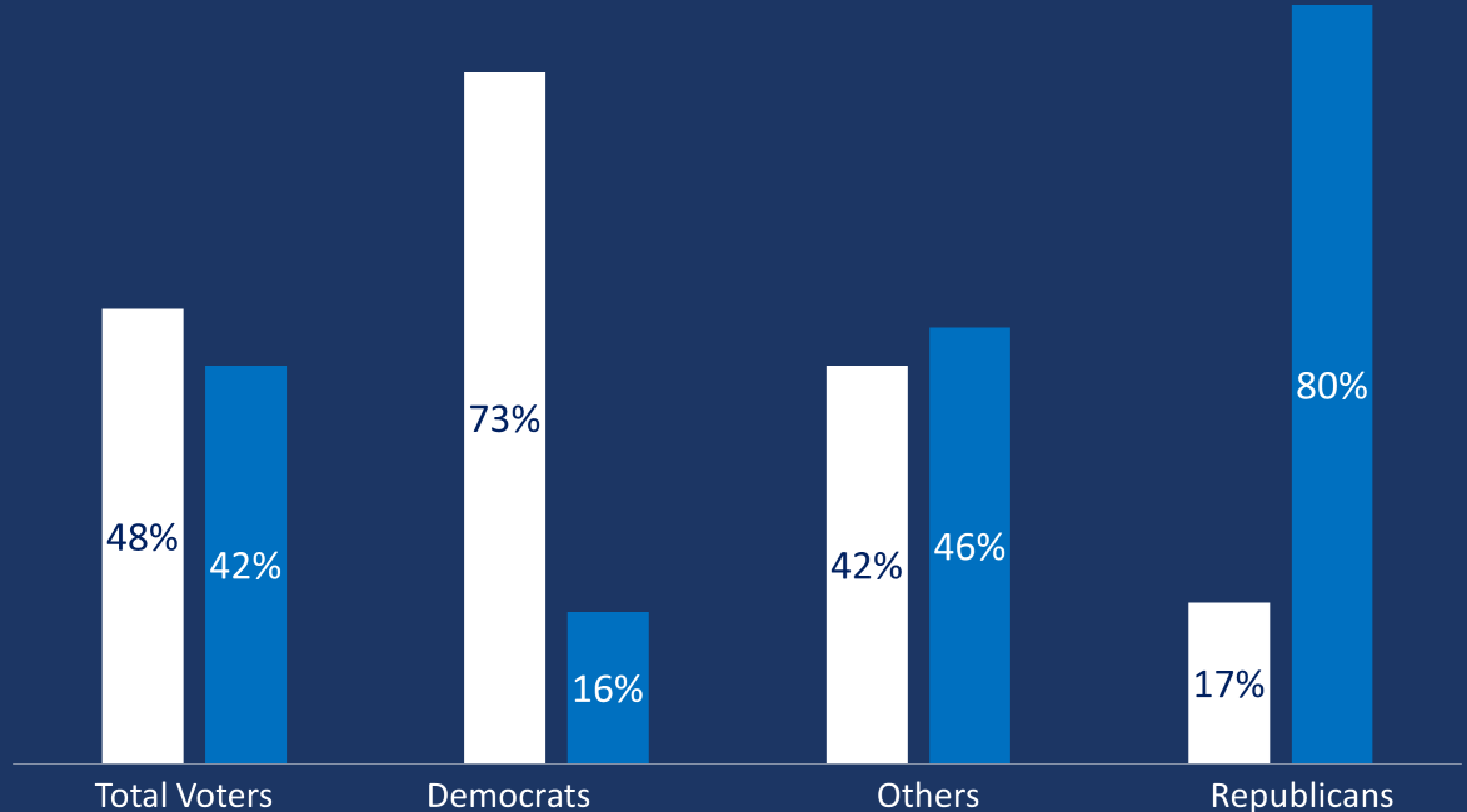
	EDUCATION	JOBS	ENVIRONMENT	OTHER
Statewide	13	11	11	Healthcare 10% Immigration 8% Gun Issues 5%
Jacksonville	22	9	9	Healthcare 11%
Gainesville	15	15	8	Healthcare 15%
Tallahassee	25	6	6	Crime/Drugs 13%
Panama City/Pensacola	16	18	5	Immigration 18%
Orlando/Daytona	15	11	13	Healthcare 11%
Tampa/St. Pete	8	10	12	Healthcare 12%
Ft. Myers/Naples	8	17	11	Immigration 8%
Broward/Miami	13	12	11	Healthcare 9%
Palm Beach	14	10	13	Healthcare 10%

Top Voter Concerns

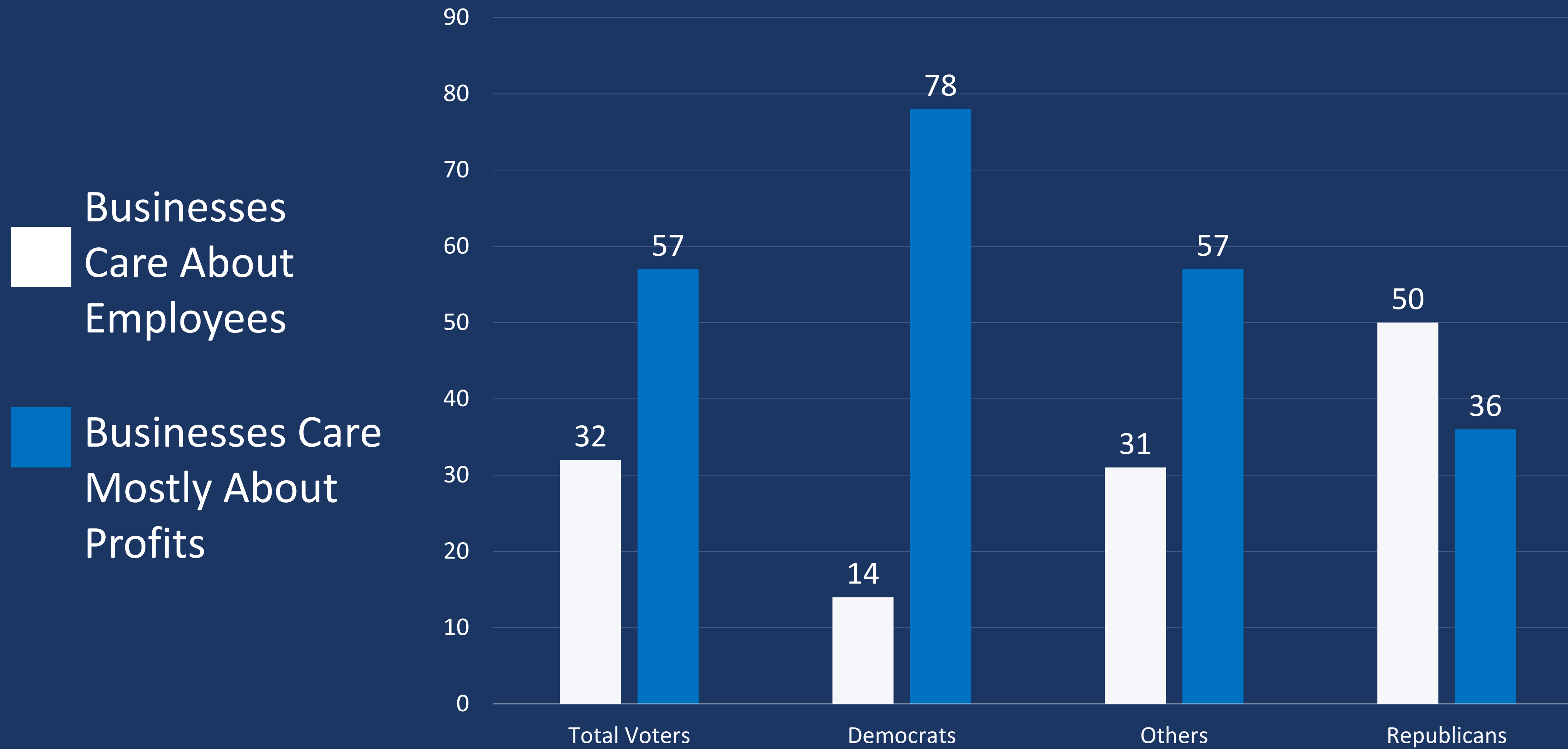
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Statewide	13	11	11	Healthcare 10% Immigration 8% Gun Issues 5%
Men	9	12	13	Healthcare 8%
Women	17	11	9	Healthcare 11%
Rep	11	12	6	Immigration 13%
Dem	16	11	13	Healthcare 13%
Others	13	11	16	Healthcare 8%
White	12	10	15	Immigration 10%
Black	13	14	1	Healthcare 19%
Hispanic	19	17	6	Immigration 9%

What's Better? Socialism or Capitalism?

Voters Under 40



What Do You Think Motivates Business In Florida?



Getting Involved is Easy

#1

Join Us

- Florida Business Leader's Summit on Prosperity and Economic Opportunity – 5.22.2019
- Florida International Trade and Investment Conference – 5.30.2019
- Learners to Earners Workforce Summit – 6.18.2019

#2

Join a coalition/task force

- Autonomous Florida- www.Autonomous-Florida.com
- Business Alliance for Early Learning
- Infrastructure Coalition...and more

#3

Call Carolyn

- cgosselin@flchamber.com
- 850-521-1287

Download Today:

[www. FloridaChamber.com/Hernando](http://www.FloridaChamber.com/Hernando)



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