



Uniting Business for Good

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

A man in a suit, Mark Wilson, is speaking at a podium. Behind him is a large screen displaying a presentation titled "THE FLORIDA CHAMBER OF COMMERCE". The screen shows various economic statistics for the State of Florida, including unemployment rates, GDP, and population. The Florida state flag is visible to the left of the speaker.

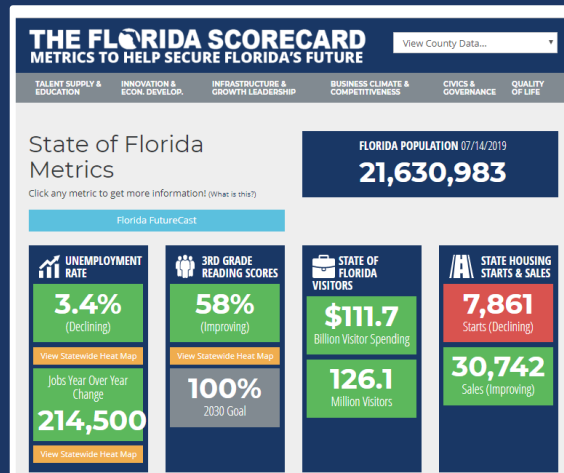
“Florida is changing. Our ECONOMICS, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson

Download this presentation at www.FloridaChamber.com/ETM

Uniting Business For Good



Solutions (Research)



Actions (Lobbying & Grassroots)



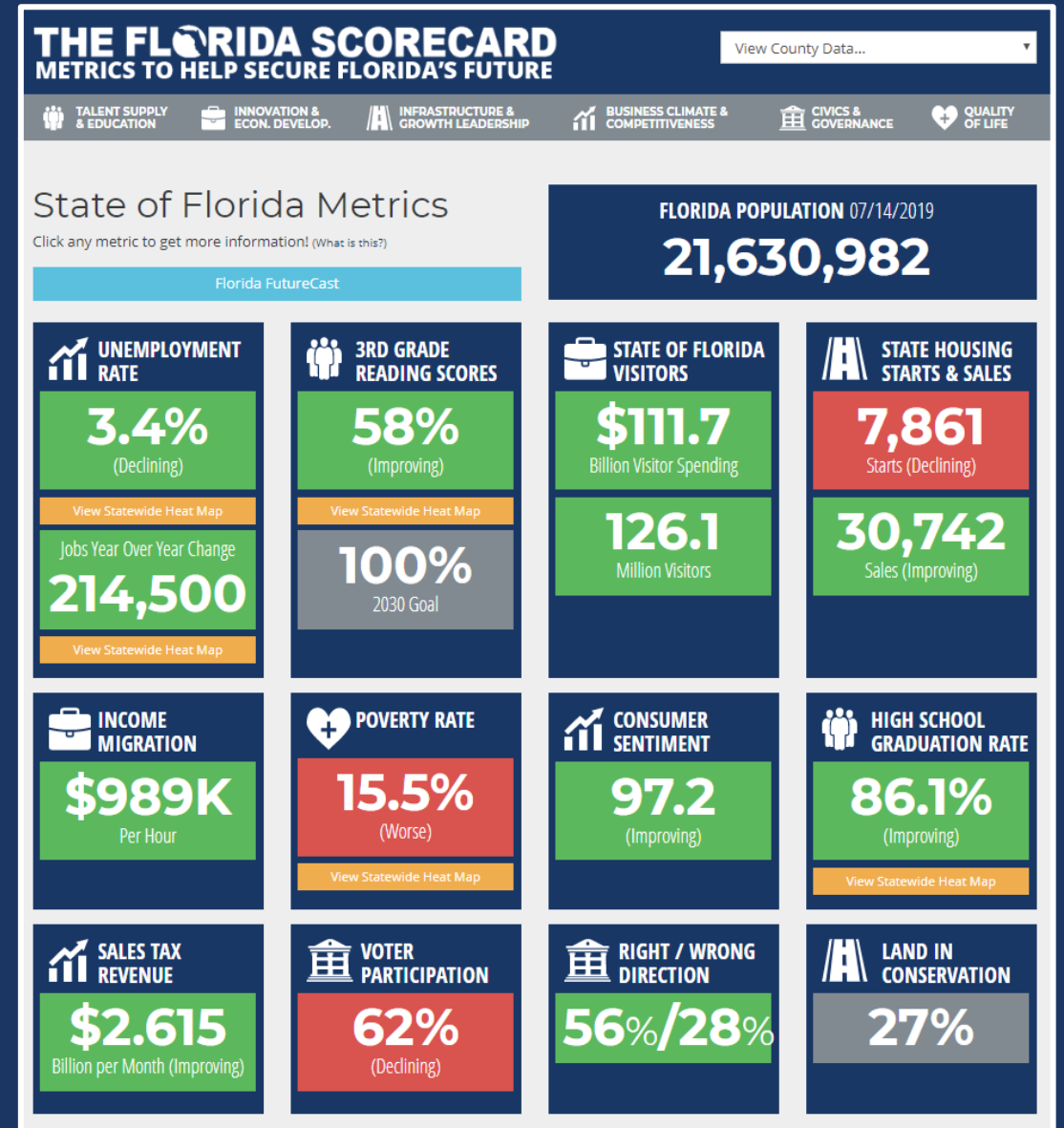
Leadership (Elections)

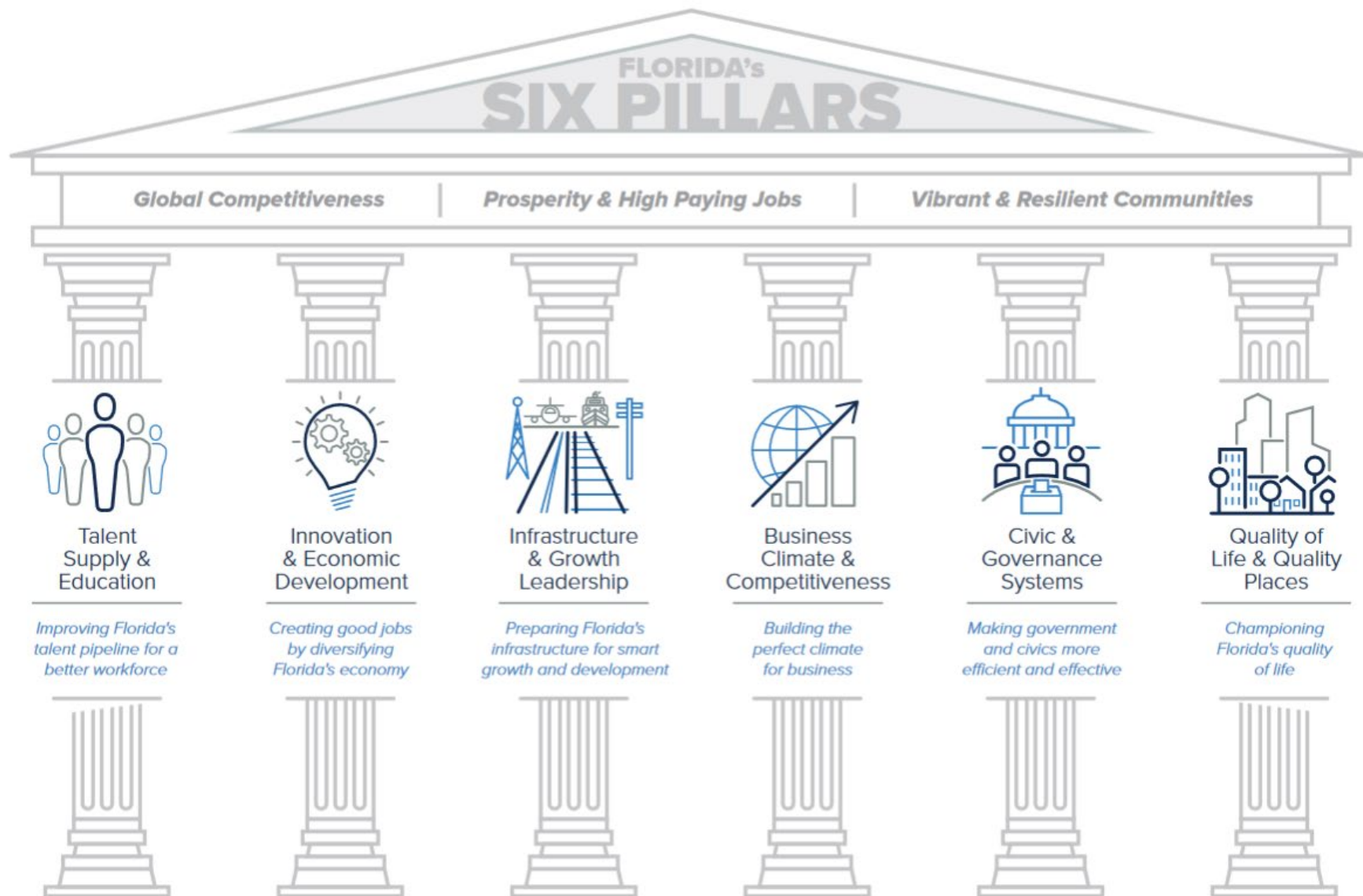


Florida At A Glance

- Florida's Economy \$1 Trillion GDP (17th)
- 21.6 Million Residents
 - 3rd / 26M By 2030 / More Than 900/Day
- 126.1 Million Visitors In 2018 (+50M by 2030)
- Florida Creates 1-Out-Of-Every-13 New U.S. Jobs
- 289,700 Jobs Looking for People. 353,000 People Looking for Jobs.

www.TheFloridaScorecard.org





Help secure Florida's future at
Florida2030.org

Track Florida's progress at
TheFloridaScorecard.org

Job Creation by State: 2014-2018

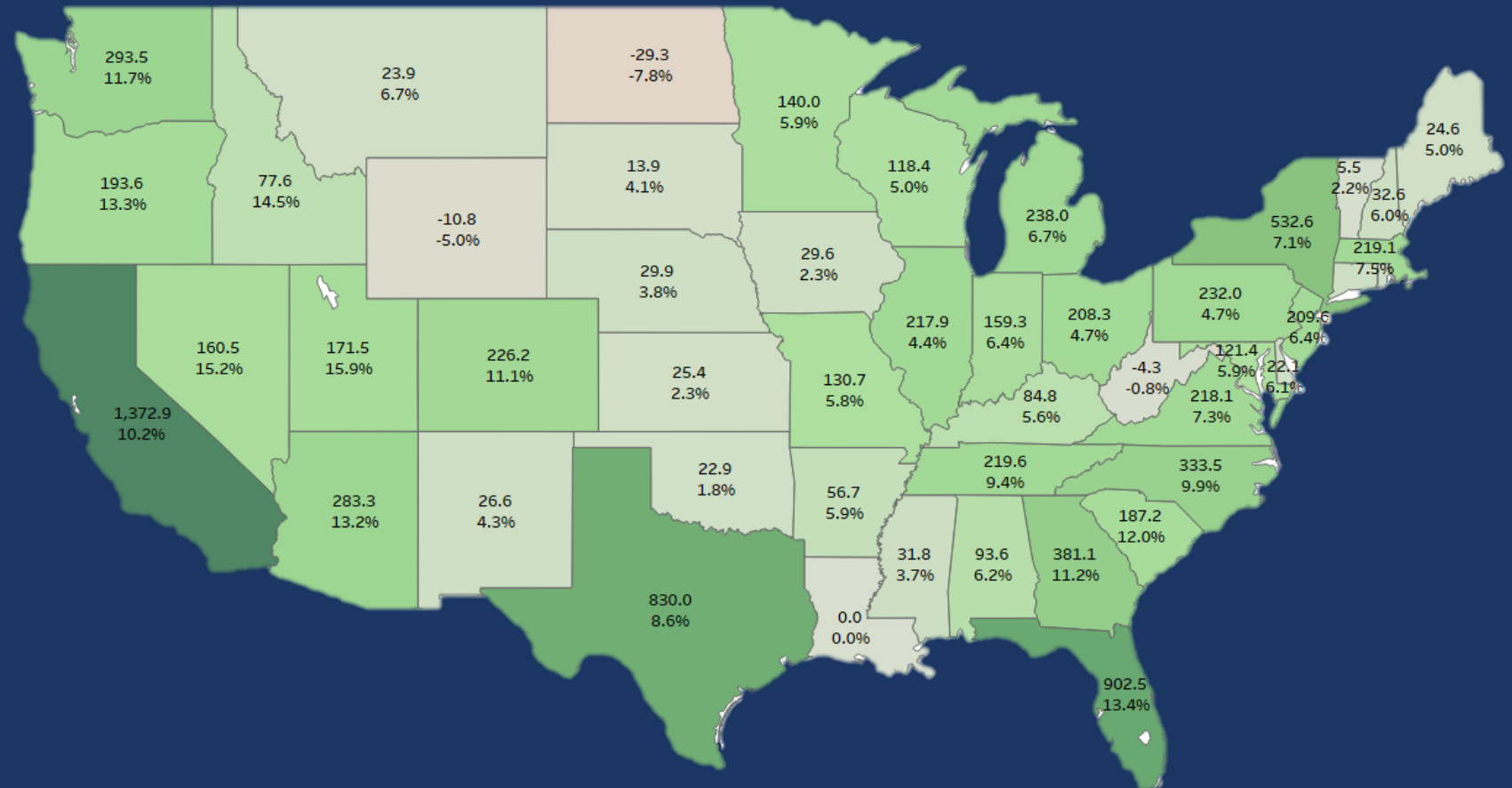
(thousands)

Top States for Job Creation:

1.	California	1,372,943
2.	Florida	902,546
3.	Texas	829,967
4.	New York	532,572
5.	Georgia	381,051
6.	North Carolina	333,493
7.	Washington	293,545
8.	Arizona	283,305
9.	Michigan	238,047
10.	Pennsylvania	232,049

Top Job Growth Rates:

1.	Utah	15.9%
2.	Nevada	15.2%
3.	Idaho	14.5%
4.	Florida	13.4%
5.	Oregon	13.3%
6.	Arizona	13.2%
7.	S. Carolina	12.0%
8.	Washington	11.7%
9.	Georgia	11.2%
10.	Colorado	11.1%



5 States had zero or negative job growth: Louisiana (0), West Virginia (-4,295), Alaska (-7,255), Wyoming (-10,847), North Dakota (-29,294)

Industry	Jobs – June 2018 thru June 2019	Percent Growth
Education & Health Services	54,700	4.2%
Professional & Business Services	40,500	3.0%
Leisure & Hospitality	31,200	2.6%
Construction	25,800	4.8%
Trade, Transportation & Utilities	18,800	1.1%
Financial Activities	17,400	3.0%
Manufacturing	10,500	2.8%

Job Creation June 2018 – June 2019

U.S. Growth Rate 1.5%

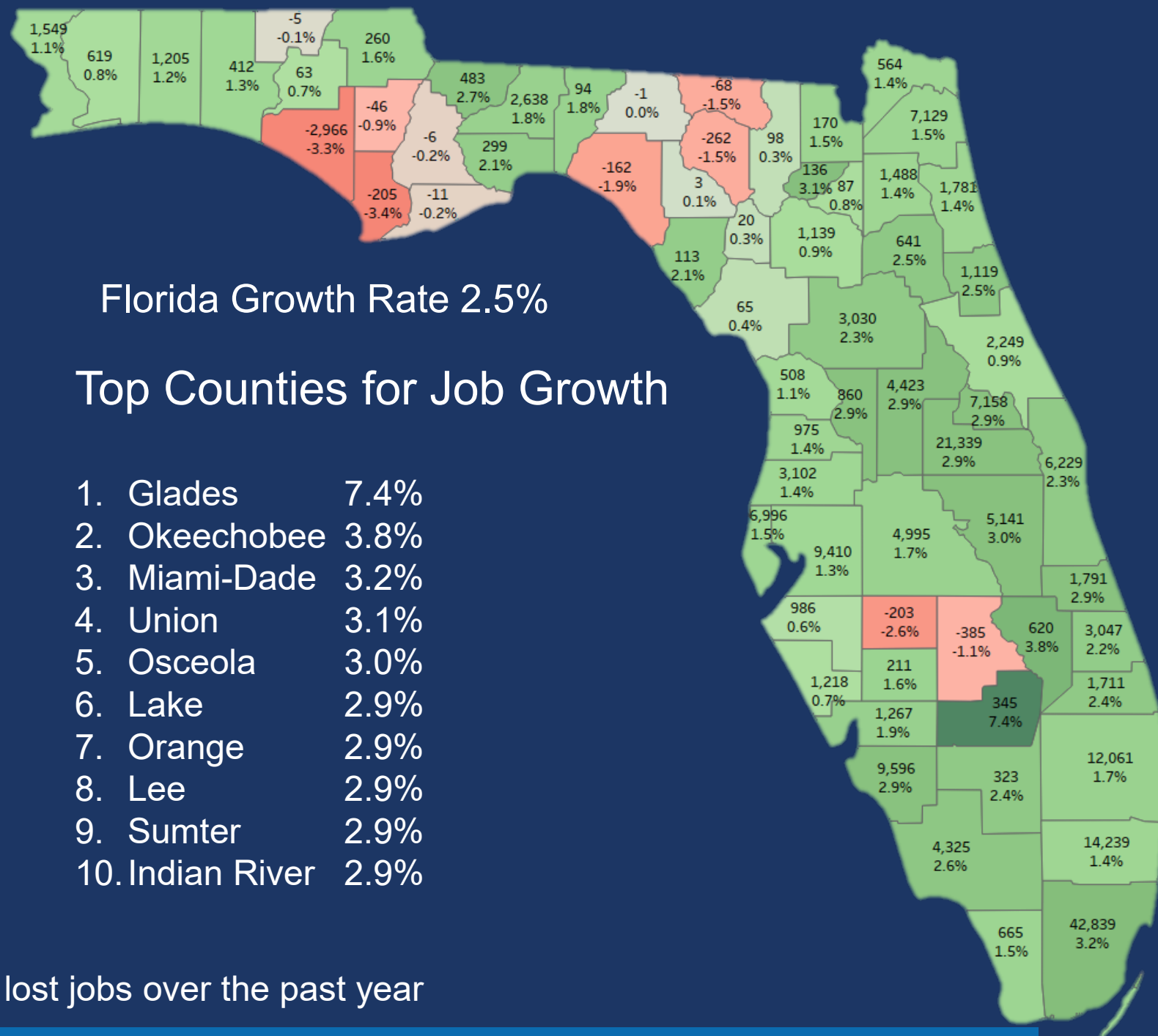
Top Counties for Jobs

1.	Miami-Dade	42,839
2.	Orange	21,339
3.	Broward	14,239
4.	Palm Beach	12,061
5.	Lee	9,596
6.	Hillsborough	9,410
7.	Seminole	7,158
8.	Duval	7,129
9.	Pinellas	6,996
10.	Brevard	6,229

Florida Growth Rate 2.5%

Top Counties for Job Growth

1.	Glades	7.4%
2.	Okeechobee	3.8%
3.	Miami-Dade	3.2%
4.	Union	3.1%
5.	Osceola	3.0%
6.	Lake	2.9%
7.	Orange	2.9%
8.	Lee	2.9%
9.	Sumter	2.9%
10.	Indian River	2.9%



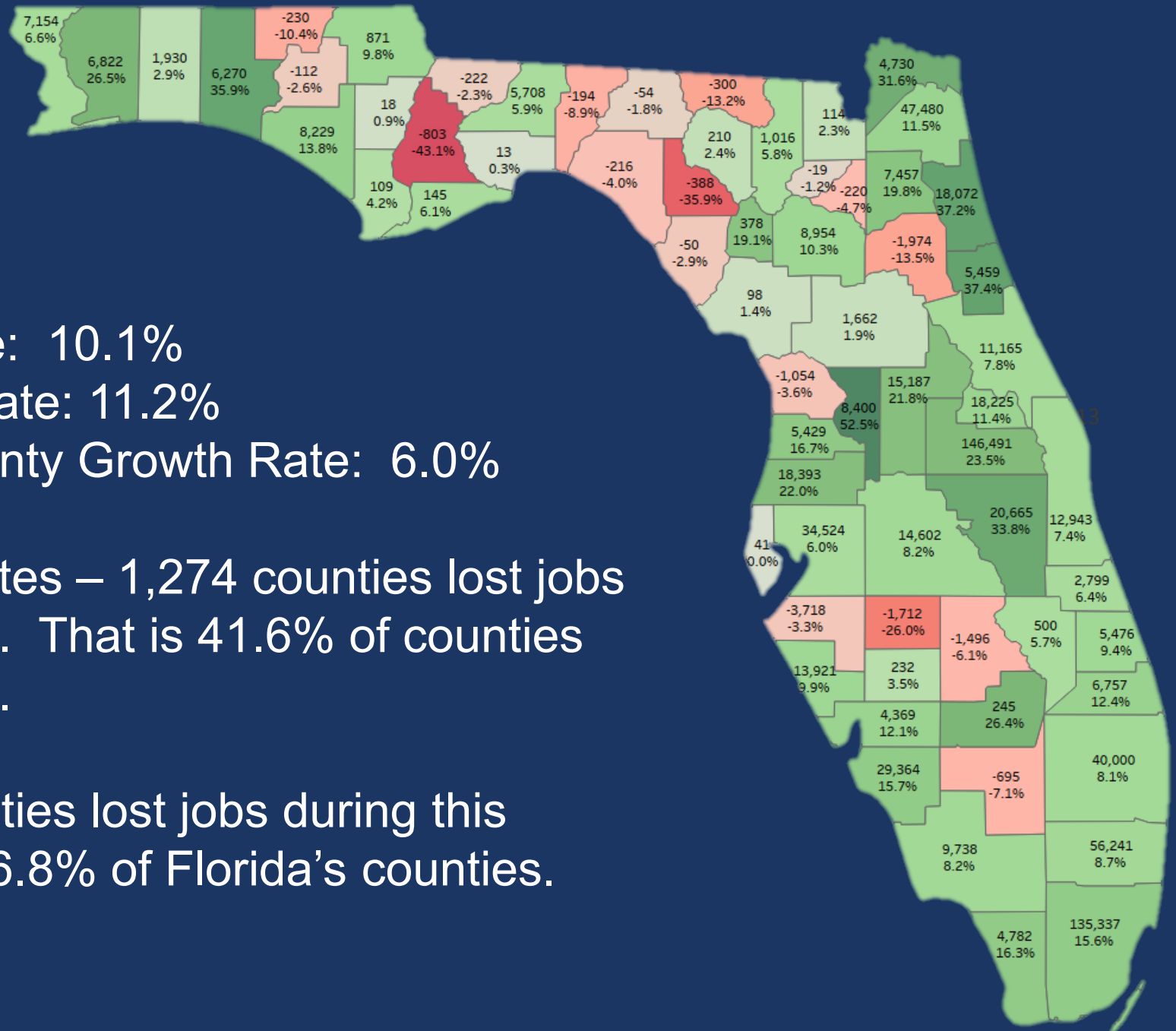
12 Florida counties lost jobs over the past year

Job Creation 2007 to Q3 2018

U.S. Growth Rate: 10.1%
Florida Growth Rate: 11.2%
Hillsborough County Growth Rate: 6.0%

The Other 49 States – 1,274 counties lost jobs during this period. That is 41.6% of counties outside of Florida.

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



Florida's Economic Diversification Strategy is Working

Manufacturing: Florida 3.7x U.S. Rate

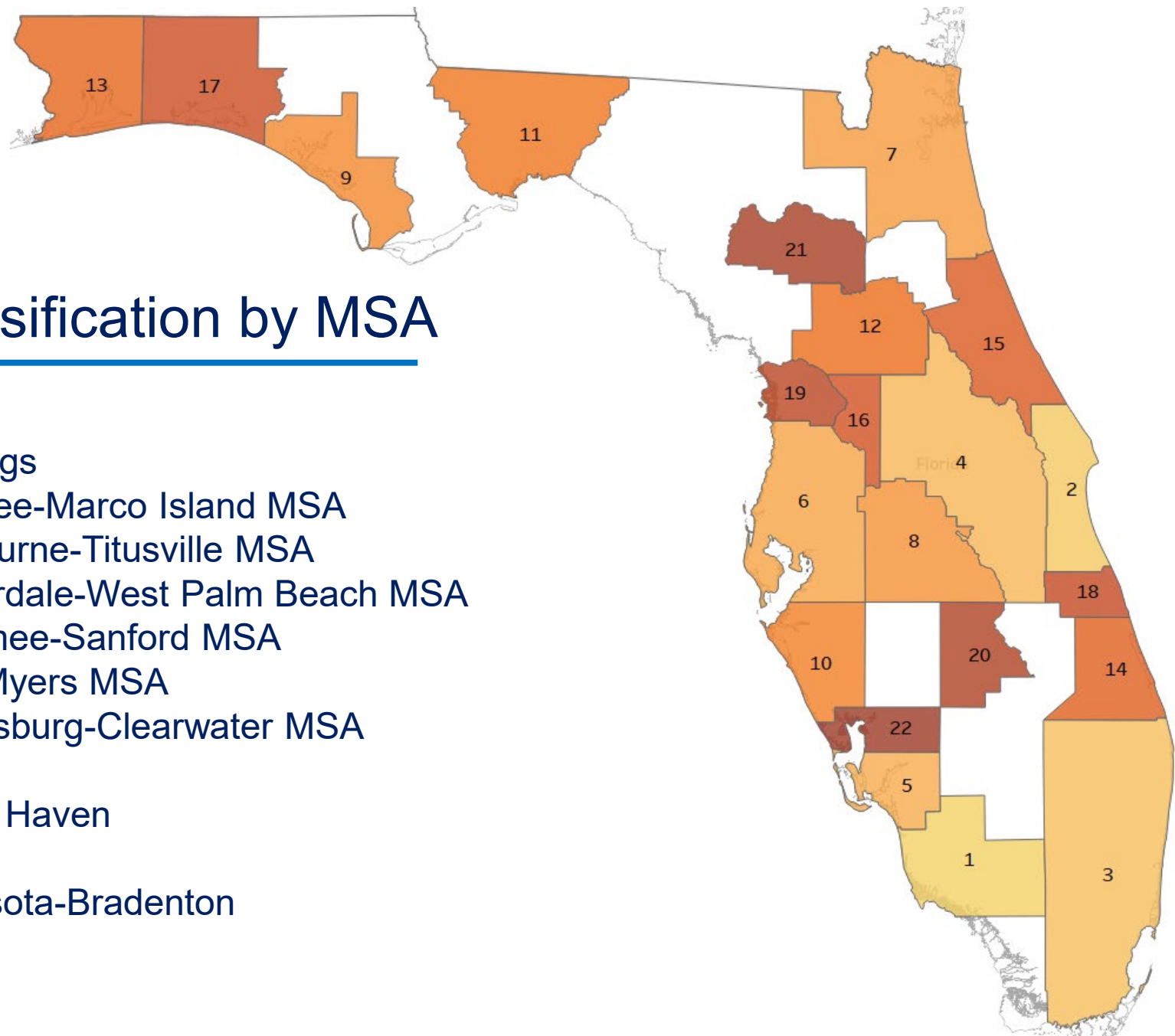
Florida-current



Florida-2017

6,713





Industry Diversification by MSA

Diversification Rankings

- #1 Naples-Immokalee-Marco Island MSA
- #2 Palm Bay-Melbourne-Titusville MSA
- #3 Miami-Ft. Lauderdale-West Palm Beach MSA
- #4 Orlando-Kissimmee-Sanford MSA
- #5 Cape Coral-Ft. Myers MSA
- #6 Tampa-St. Petersburg-Clearwater MSA
- #7 Jacksonville
- #8 Lakeland-Winter Haven
- #9 Panama City
- #10 North Port-Sarasota-Bradenton

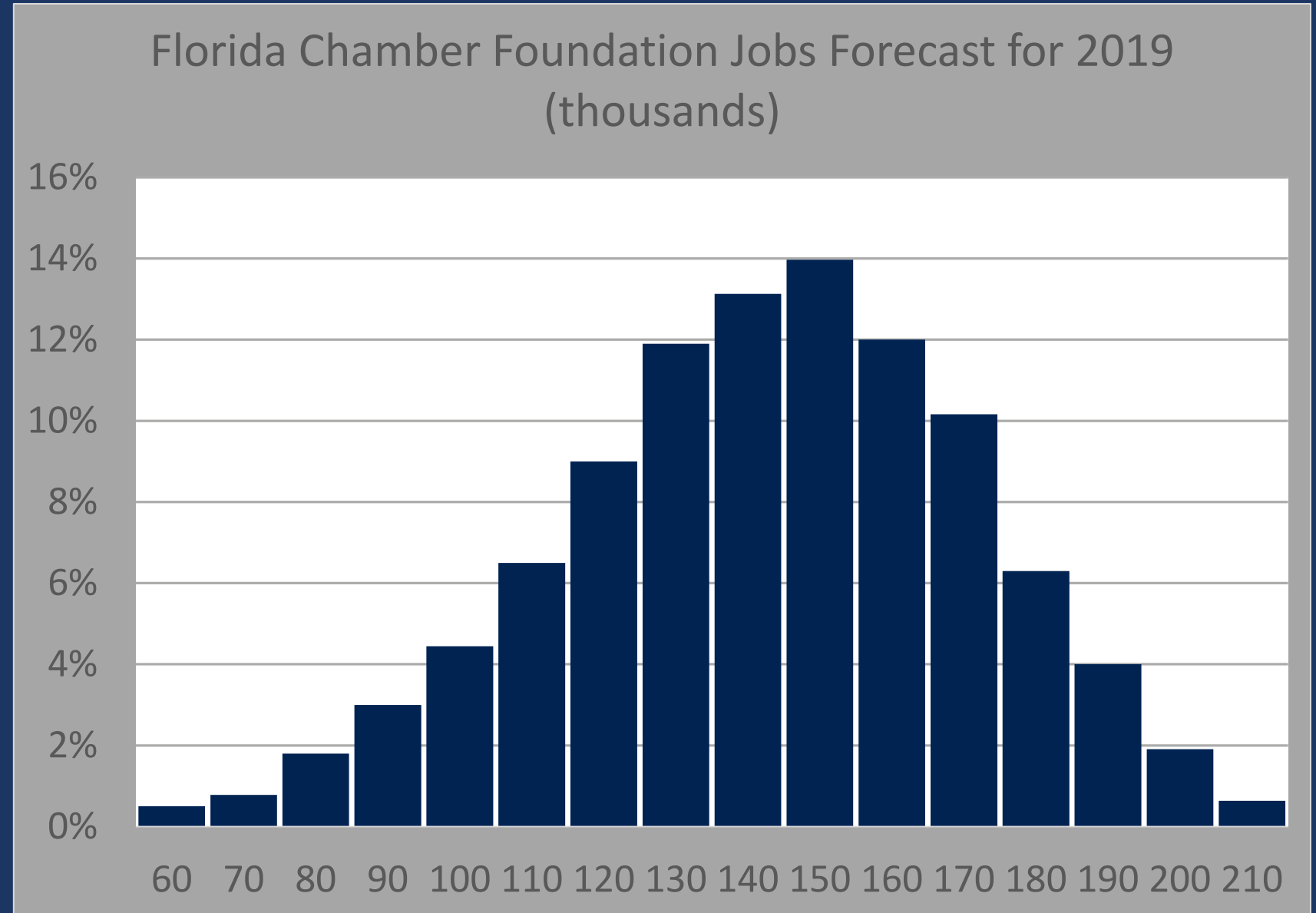
2019 Forecast

+150,000 jobs

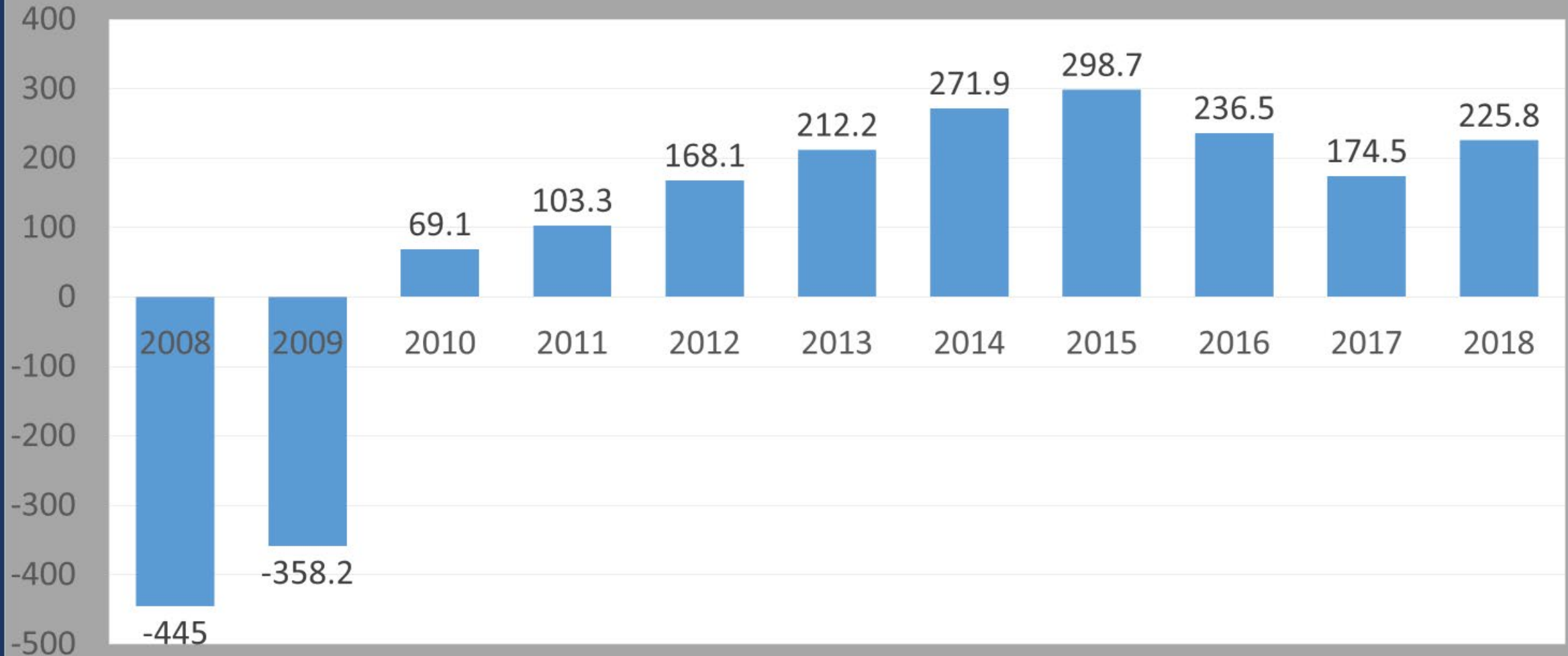
+330,000 people

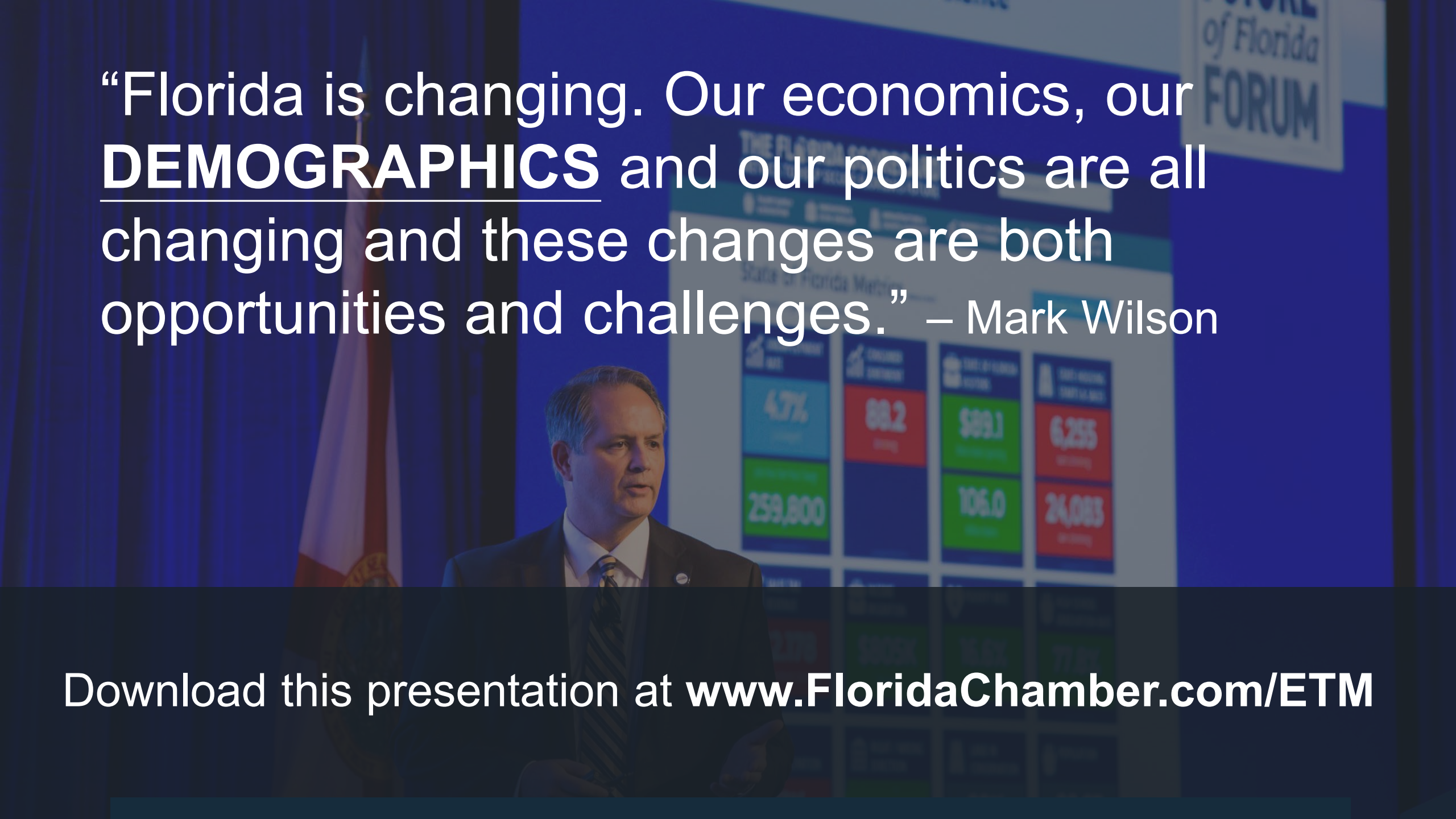
70% Probability
between 130,000
and 170,000

40% Probability
between 140,000
and 160,000



Yearly Florida Job Creation (thousands)



A man in a suit, Mark Wilson, is speaking at a podium. Behind him is a large presentation board titled "THE FLORIDA CHAMBER OF COMMERCE" and "State of Florida Meeting". The board displays various economic statistics in colored boxes. A Florida state flag is visible to the left of the speaker.

“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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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

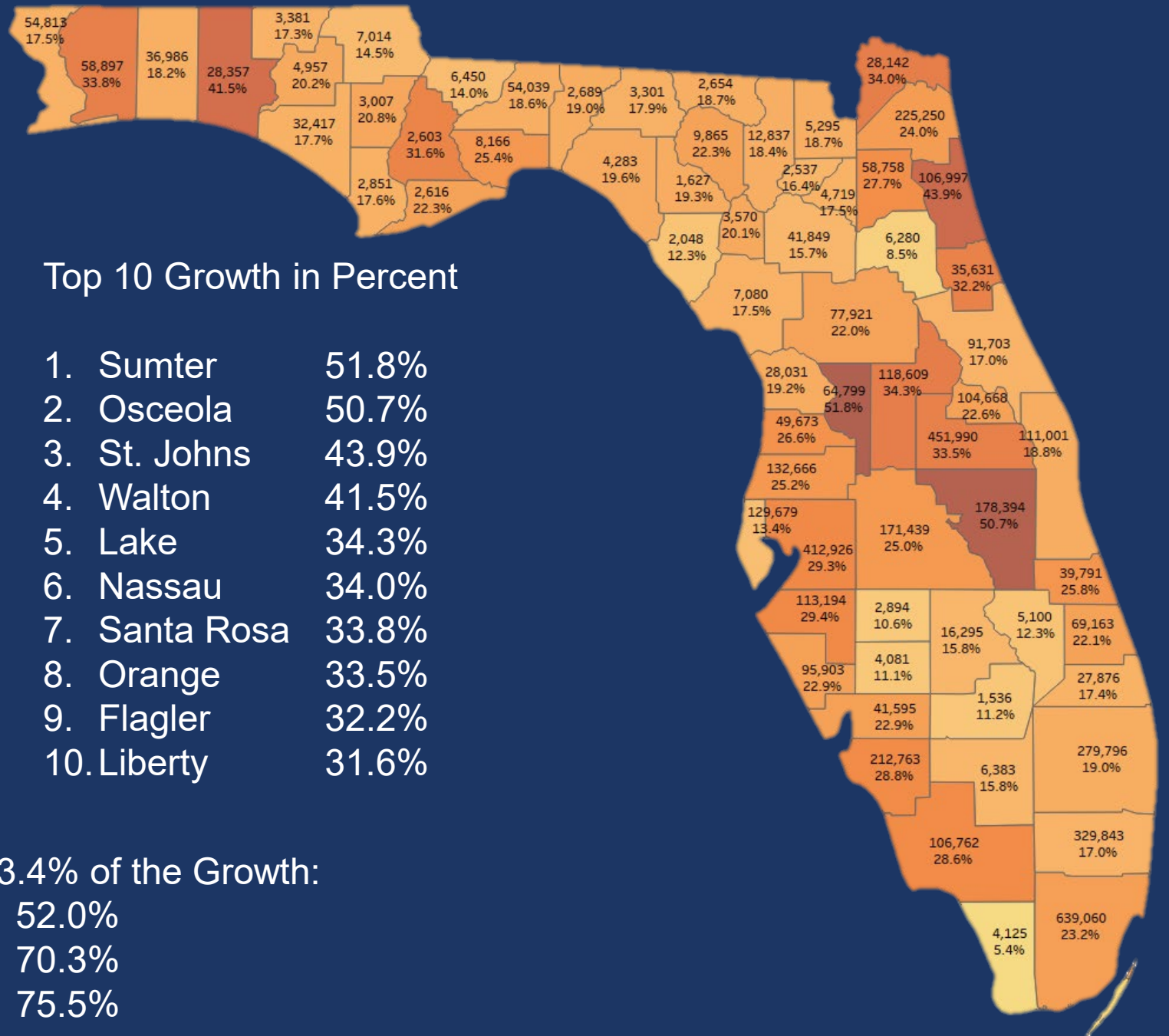
1. Sumter	51.8%
2. Osceola	50.7%
3. St. Johns	43.9%
4. Walton	41.5%
5. Lake	34.3%
6. Nassau	34.0%
7. Santa Rosa	33.8%
8. Orange	33.5%
9. Flagler	32.2%
10. Liberty	31.6%

The top 3 Counties get 33.4% of the Growth:

Top 6: 52.0%

Top 11: 70.3%

Top 13: 75.5%



Preparing Florida's Infrastructure for the Future

2018 INFRASTRUCTURE COALITION REPORT

A Florida Chamber Infrastructure Coalition
Report on Accelerating Florida Forward



**FLORIDA
CHAMBER**
of Commerce
SECURING FLORIDA'S FUTURE
www.FloridaChamber.com



Ananth Prasad
Chair, Florida Chamber's
Infrastructure Coalition

President-Designate,
Florida Transportation
Builders Association

Tampa Bay Times

THE BUZZ



DeSantis approves Florida toll road projects, overcoming environmental concerns

Galvano was sold on the idea for the roads from the [Florida Chamber of Commerce and road builders](#), which were by far the biggest supporters of the bill.

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

0%

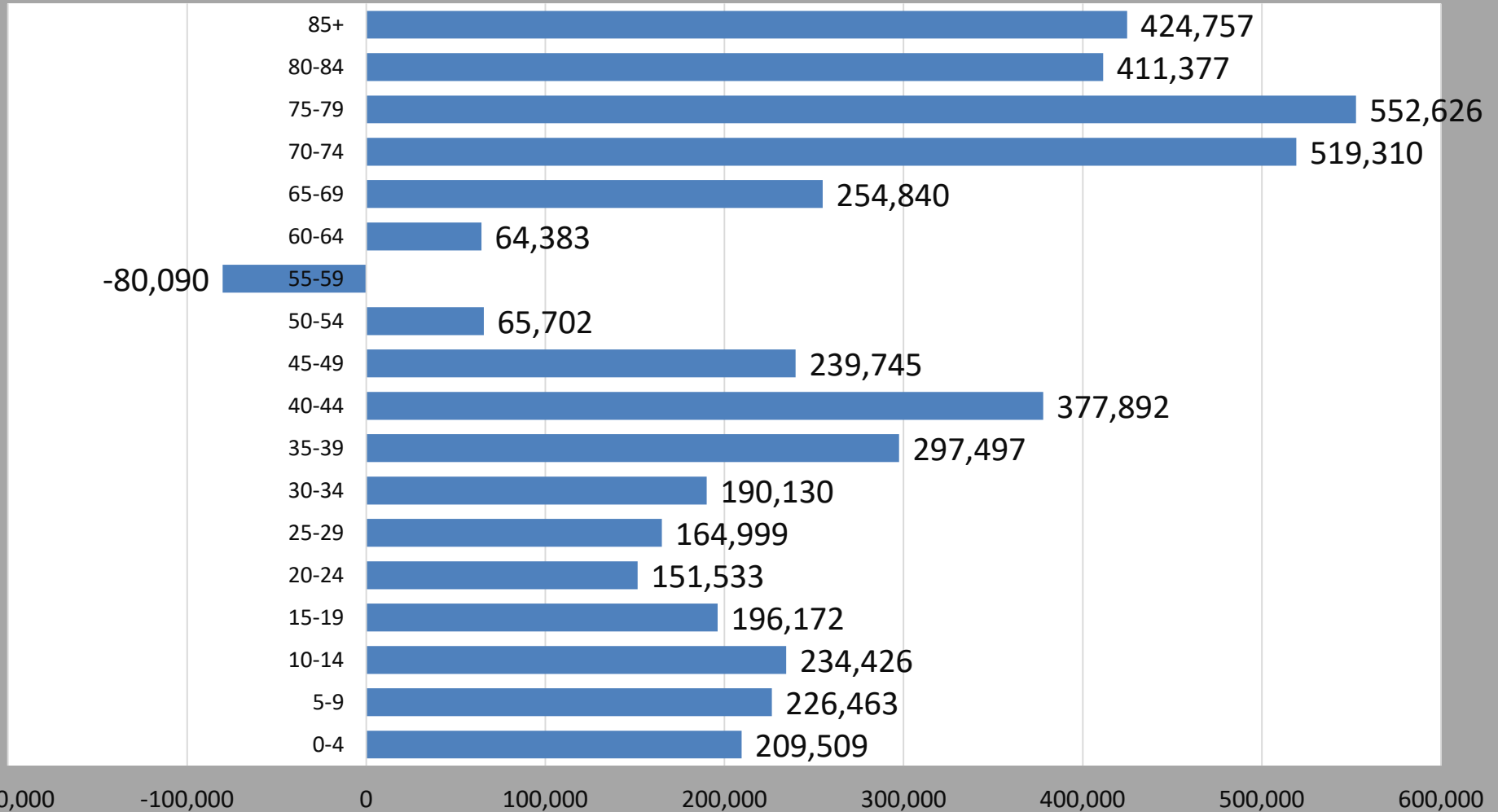
20%

40%

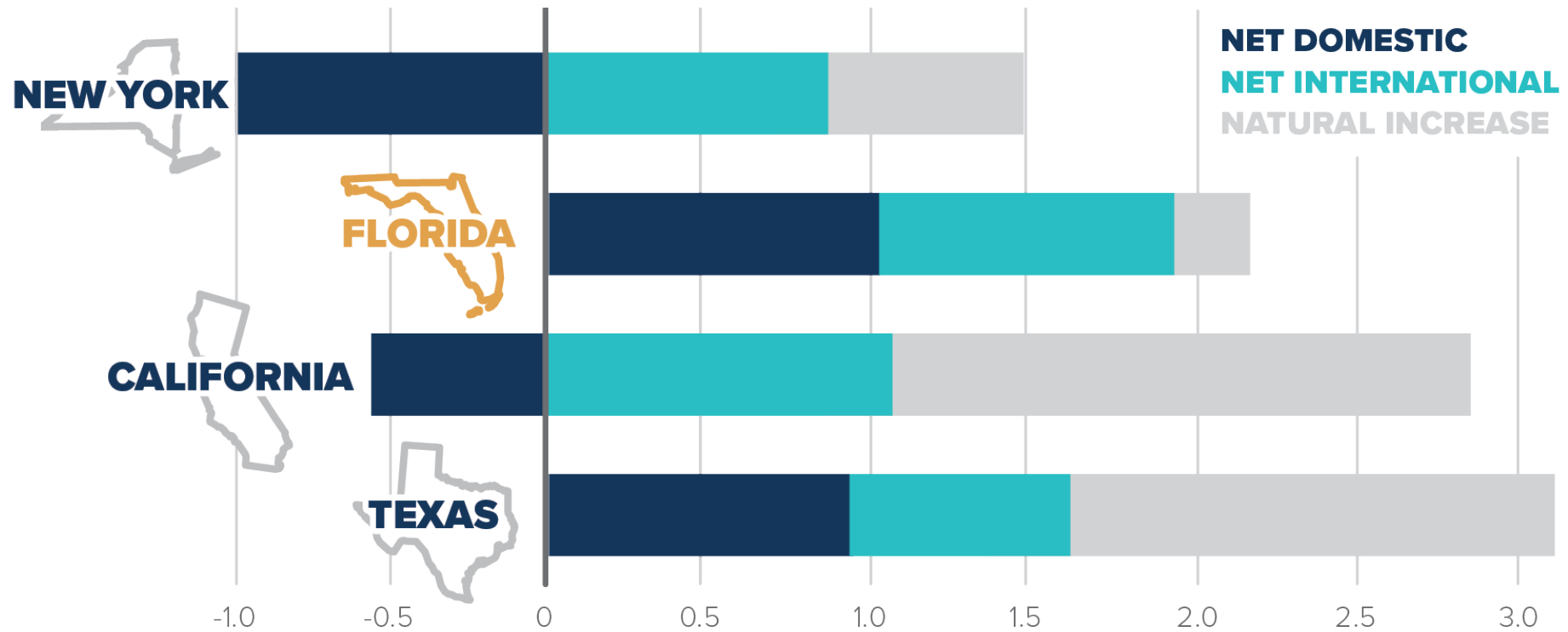
60%

80%

Florida's Next 4.5 Million People by Age Group



Where Does Florida's Growth Come From?



Florida's 3rd Grade Reading Scores

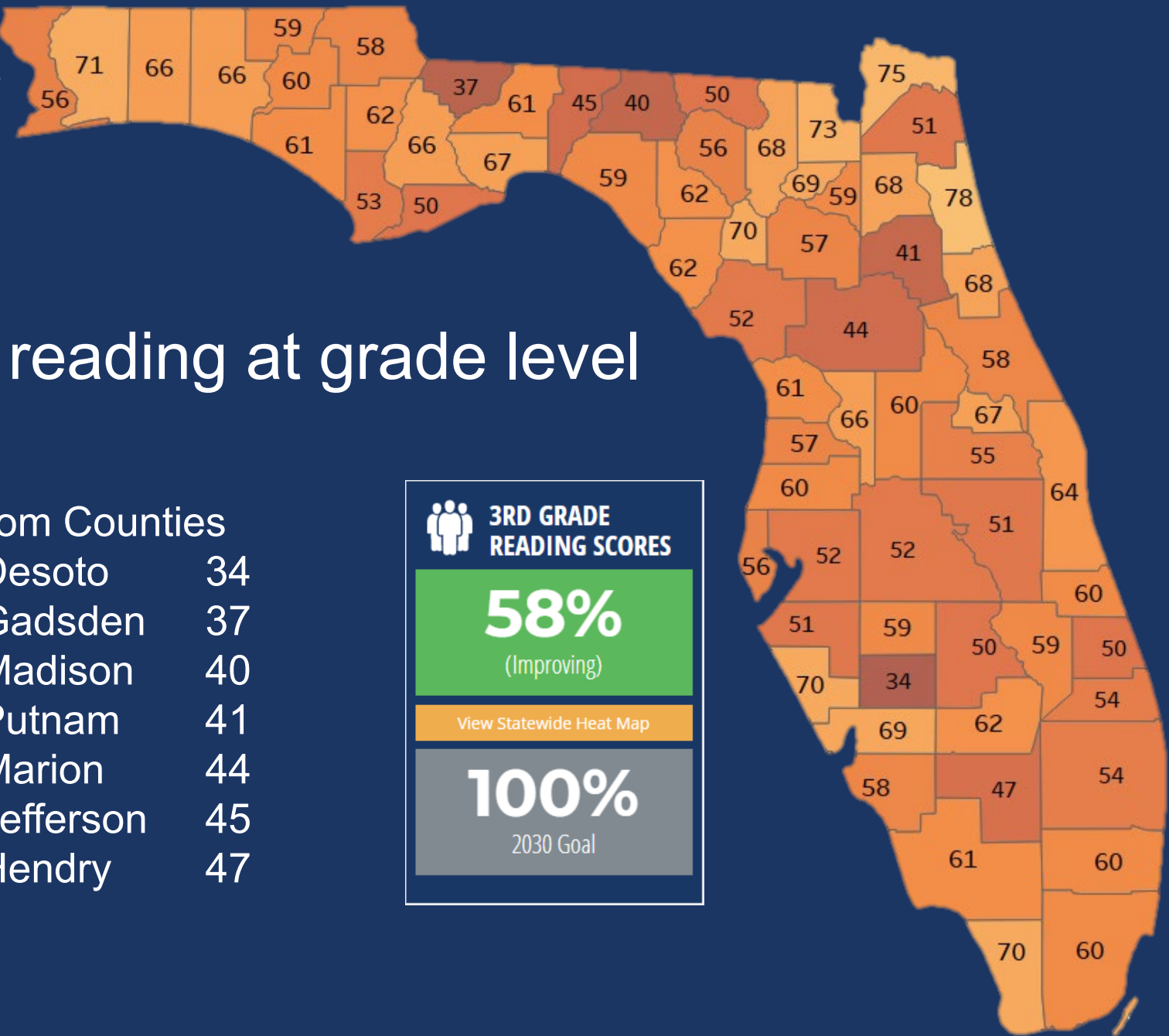
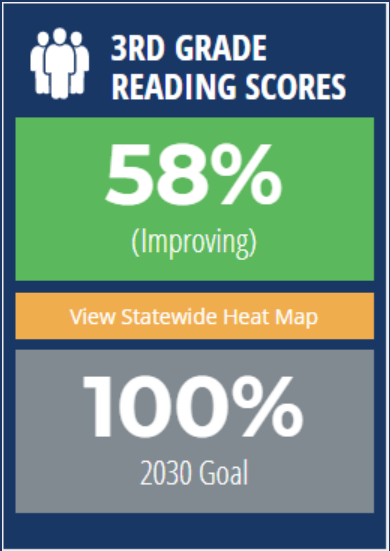
91,066 3rd graders not reading at grade level

Top Counties

- | | |
|---------------|----|
| 1. St. Johns | 78 |
| 2. Nassau | 75 |
| 3. Baker | 73 |
| 4. Santa Rosa | 71 |
| 5. Sarasota | 70 |
| 6. Monroe | 70 |
| 7. Gilchrist | 70 |

Bottom Counties

- | | |
|--------------|----|
| 1. Desoto | 34 |
| 2. Gadsden | 37 |
| 3. Madison | 40 |
| 4. Putnam | 41 |
| 5. Marion | 44 |
| 6. Jefferson | 45 |
| 7. Hendry | 47 |



Poverty in Florida

3,070,972 people living in poverty, by zip code

901,772 kids under-18 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

16

39

69

105

148

Percent of Poverty

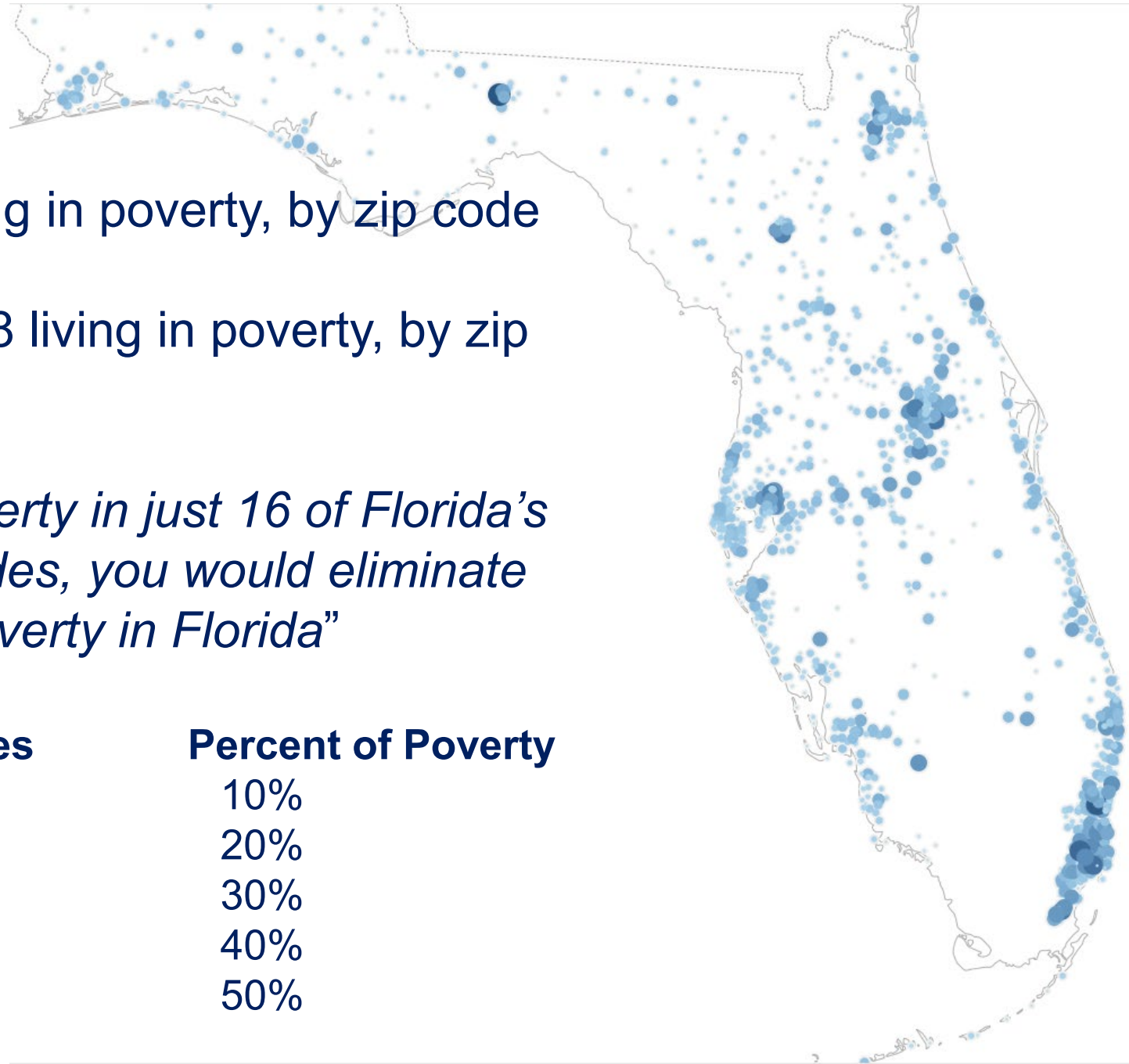
10%

20%

30%

40%

50%

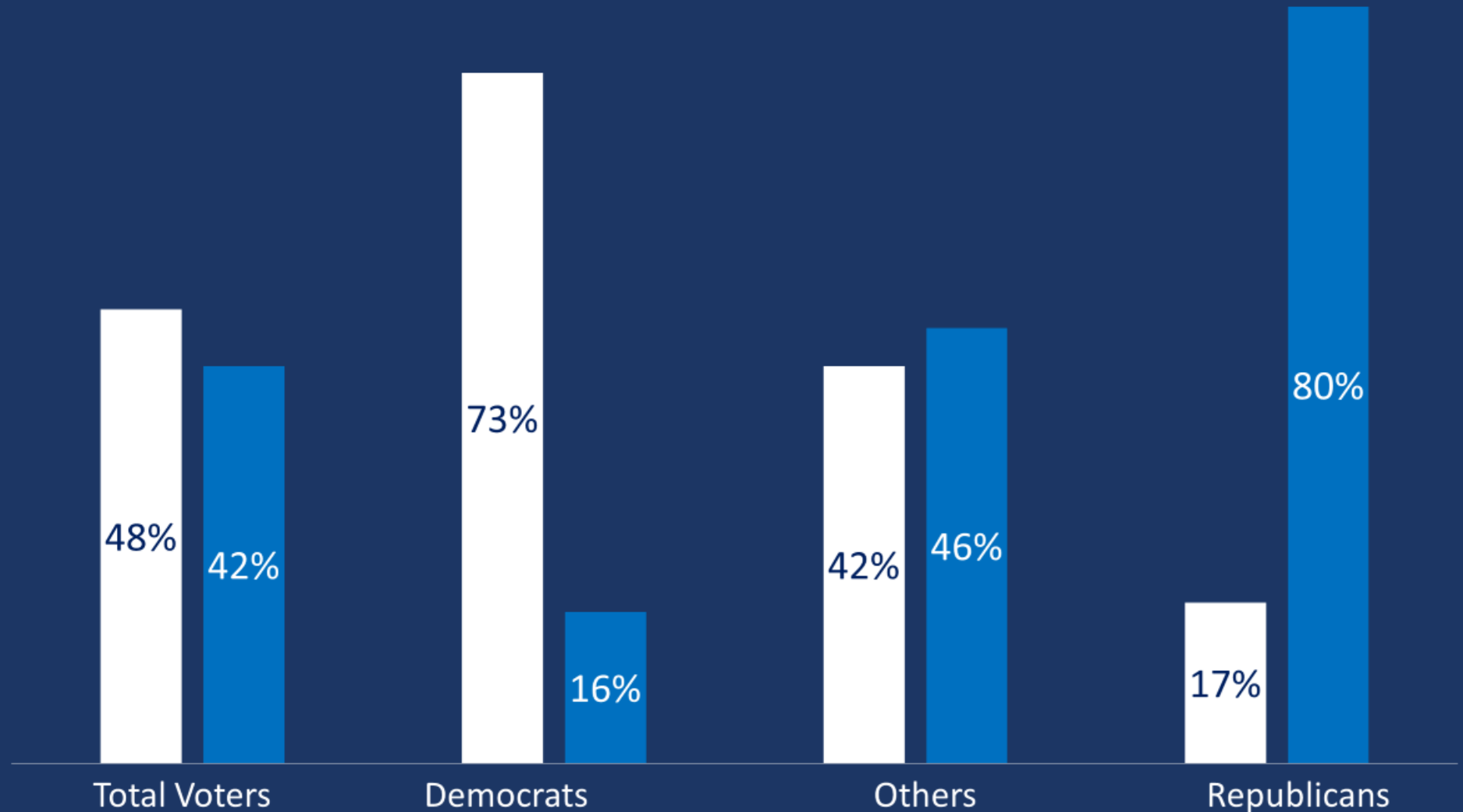


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What's Better? Socialism or Capitalism?

Voters Under 40



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



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.

We've Fought, and Won



AMENDMENT 4

FEWER JOBS

A study by a leading economist shows Amendment 4 will cost tens of thousands of jobs.

WEAKER ECONOMY

A local version of this idea proves that Amendment 4 will hurt small businesses and working families.

WASTEFUL SPENDING

Amendment 4 will waste tax dollars to pay for endless elections and lawsuits. That's the last thing we need in these tough economic times.

WILL KILL FLORIDA'S ECONOMY



For more information, visit

www.Florida2010.org

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Constitutional Amendments on the Horizon

Title	Sponsor	Number of Signatures
Raising Florida's Minimum Wage**	Florida for a Fair Wage	357,025
Allowing Energy Choice**	Citizens for Energy Choices	345,816
All Voters Vote in Primary Elections for State Legislature, Governor and Cabinet*	All Voters Vote, Inc.	272,182
Citizenship Requirement to Vote in Florida*	Florida Citizens Voters	104,780

Others with Signatures

- Right of Adults to Cannabis
- Regulate Marijuana in a Manner Similar to Alcohol to Establish Age, Licensing and Other Restrictions
- Prohibits possession of defined assault weapons
- Provide Medicaid Coverage to Eligible Low-Income Adults
- Citizenship Requirement to Vote in Florida

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

Job Approval Among Florida's Voters



Republicans

Approve: 88
Disapprove: 5



Democrats

Approve: 44
Disapprove: 35



NPAs/Others

Approve: 62
Disapprove: 20

Florida's New Supreme Court

Chief Justice Charles T. Canady
Justice Ricky Polston
Justice Jorge Labarga
Justice Alan Lawson
*Justice Barbara Lagoa
*Justice Robert J. Luck
*Justice Carlos G. Muñiz

** Gov. DeSantis Appointments*



Florida Legislature



Senate President Bill Galvano

Balance of Power

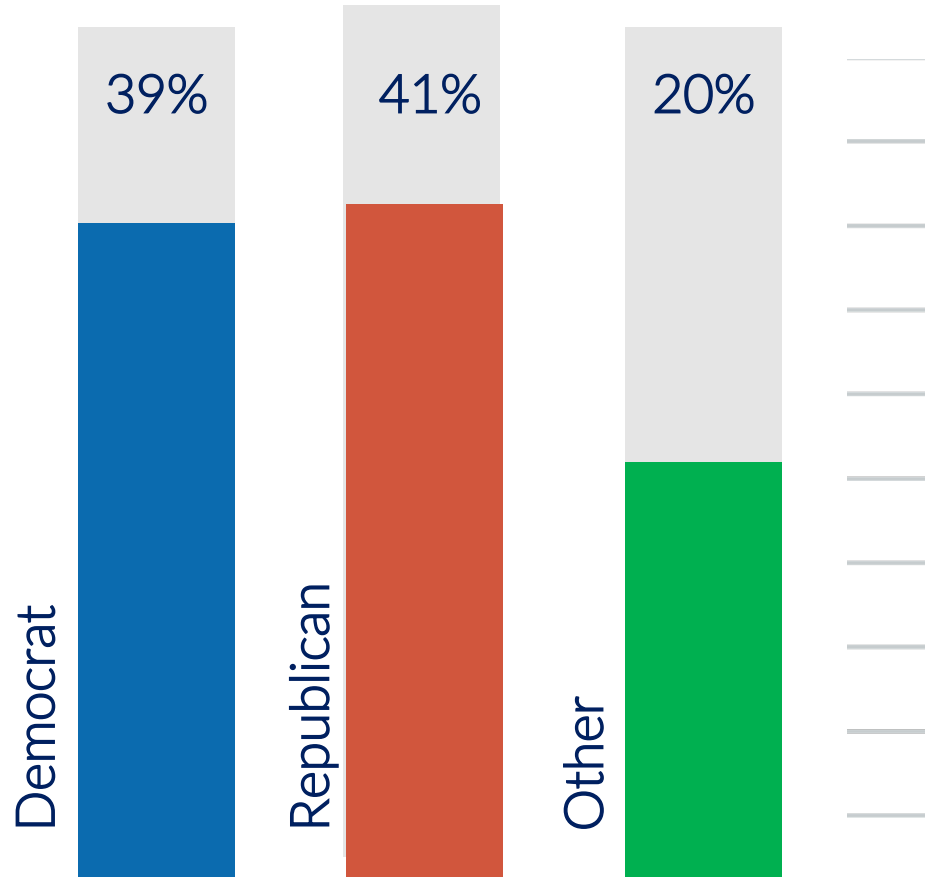
- Senate – 23 R, 17 D
 - 65% new since 2016
- House – 73 R, 47 D
 - 70% new since 2016

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



House Speaker José Oliva

2018 Voter Turnout By Party

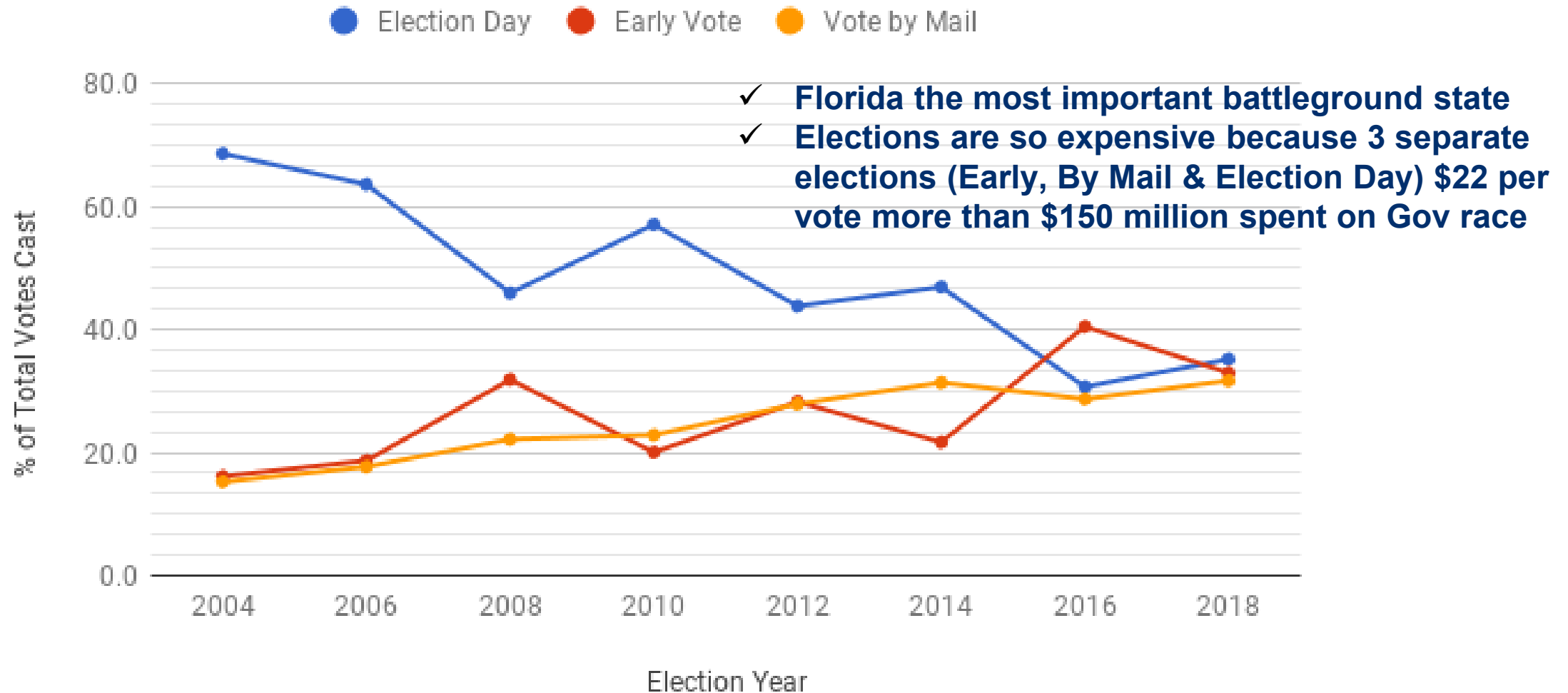


Why was Most Polling wrong in 2018?

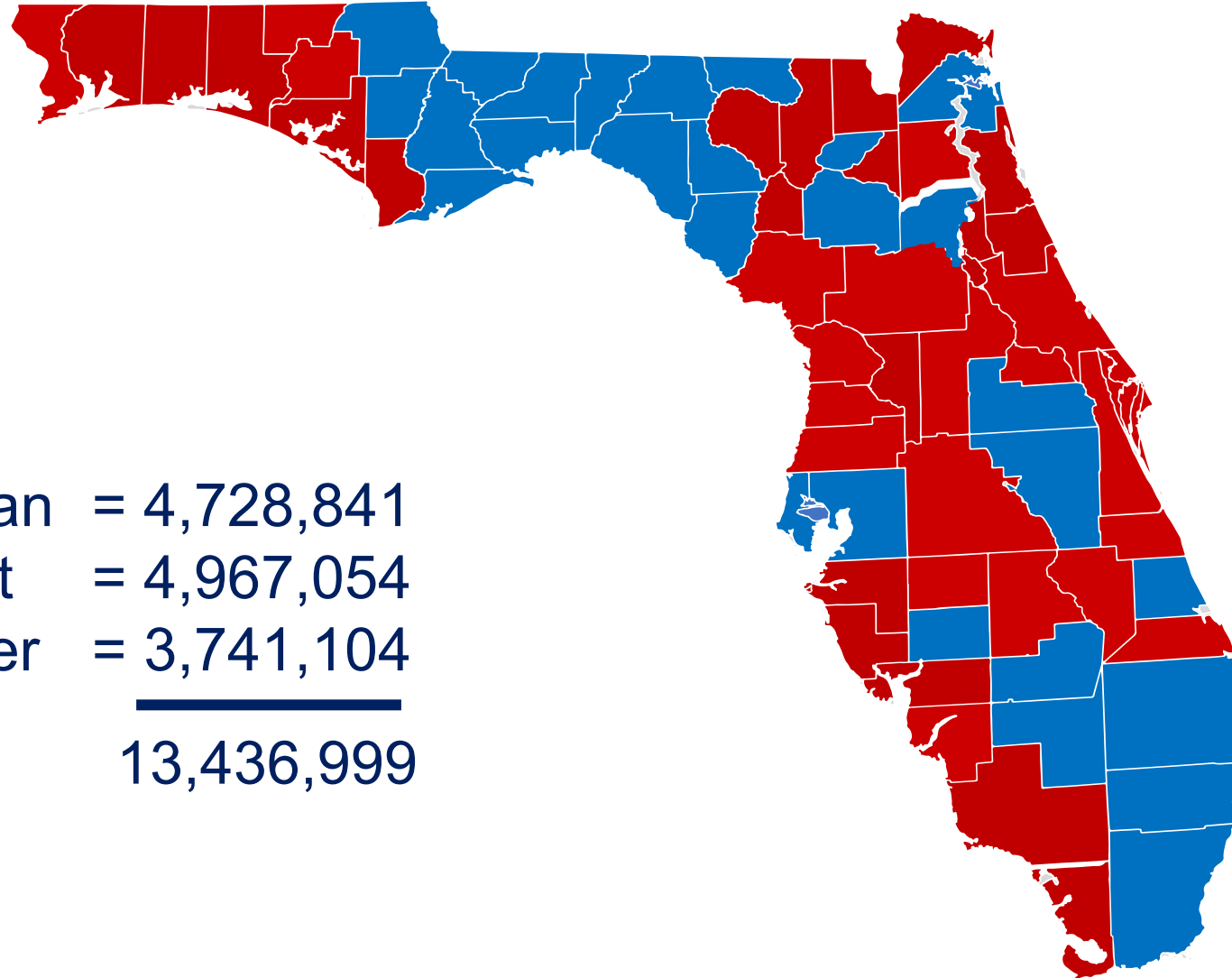
- Most polling modeled NPA's higher than they have ever been in an election in Florida. One poll even had NPA above 30%
- Other polls modeled Democratic turnout closer to registration than how they usually perform in midterm elections (R+2 is the norm)

Florida's Electoral Changes and Forecast

Vote Share by Ballot Method

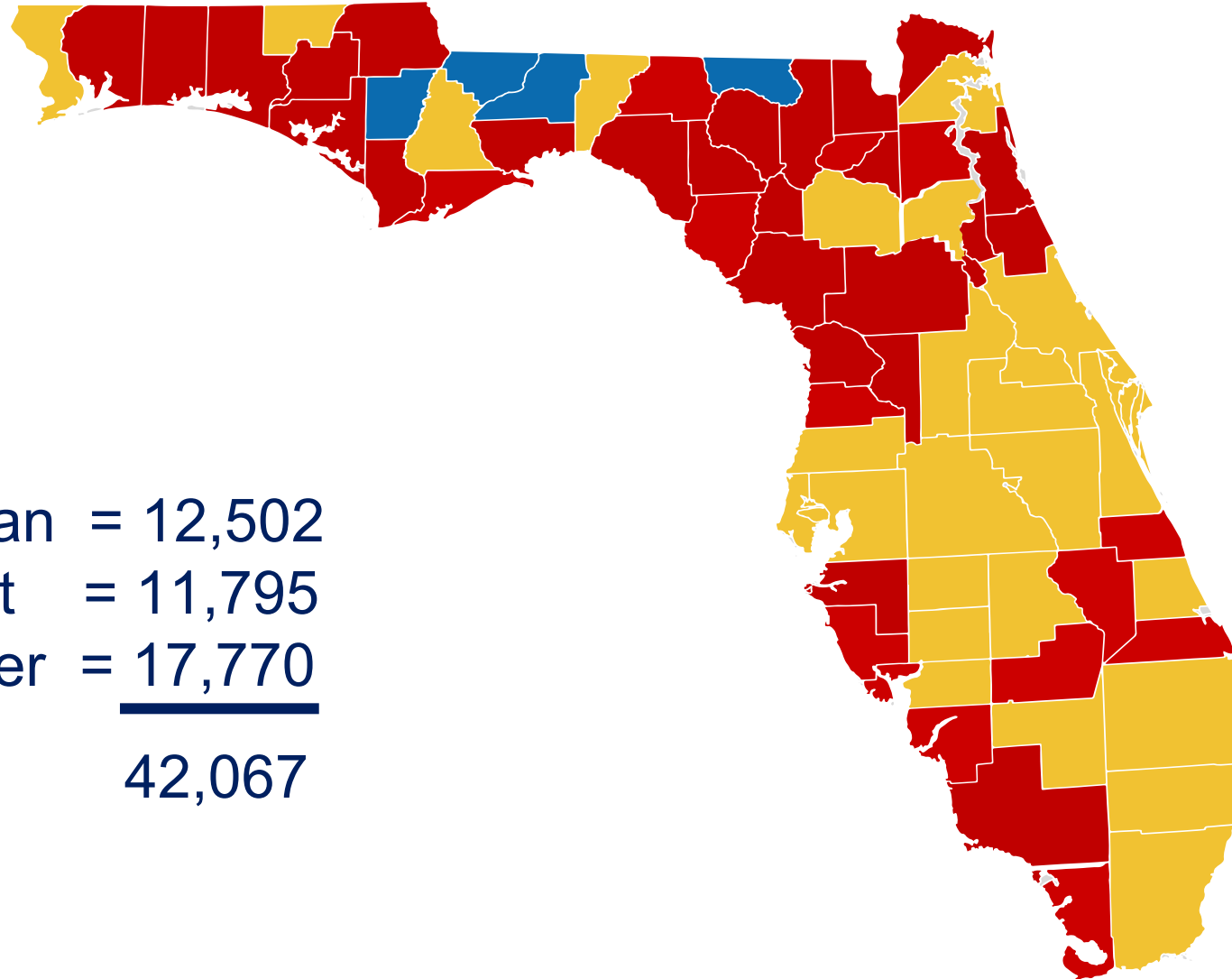


TOTAL VOTER REGISTRATION
By County (41R, 26D)



Republican	= 4,728,841
Democrat	= 4,967,054
NPA/Other	= 3,741,104
	<hr/>
	13,436,999

JUNE NEW VOTERS
By County



■ Republican = 12,502
■ Democrat = 11,795
■ NPA/Other = 17,770
42,067

Registration Comparisons Over Time

Total State: 13,436,999



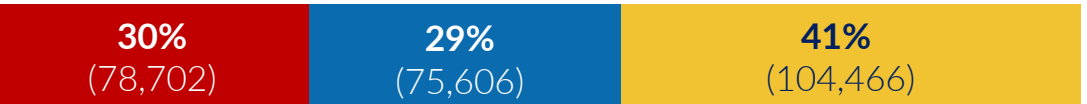
This Month: 42,067



Year to Date: 180,862



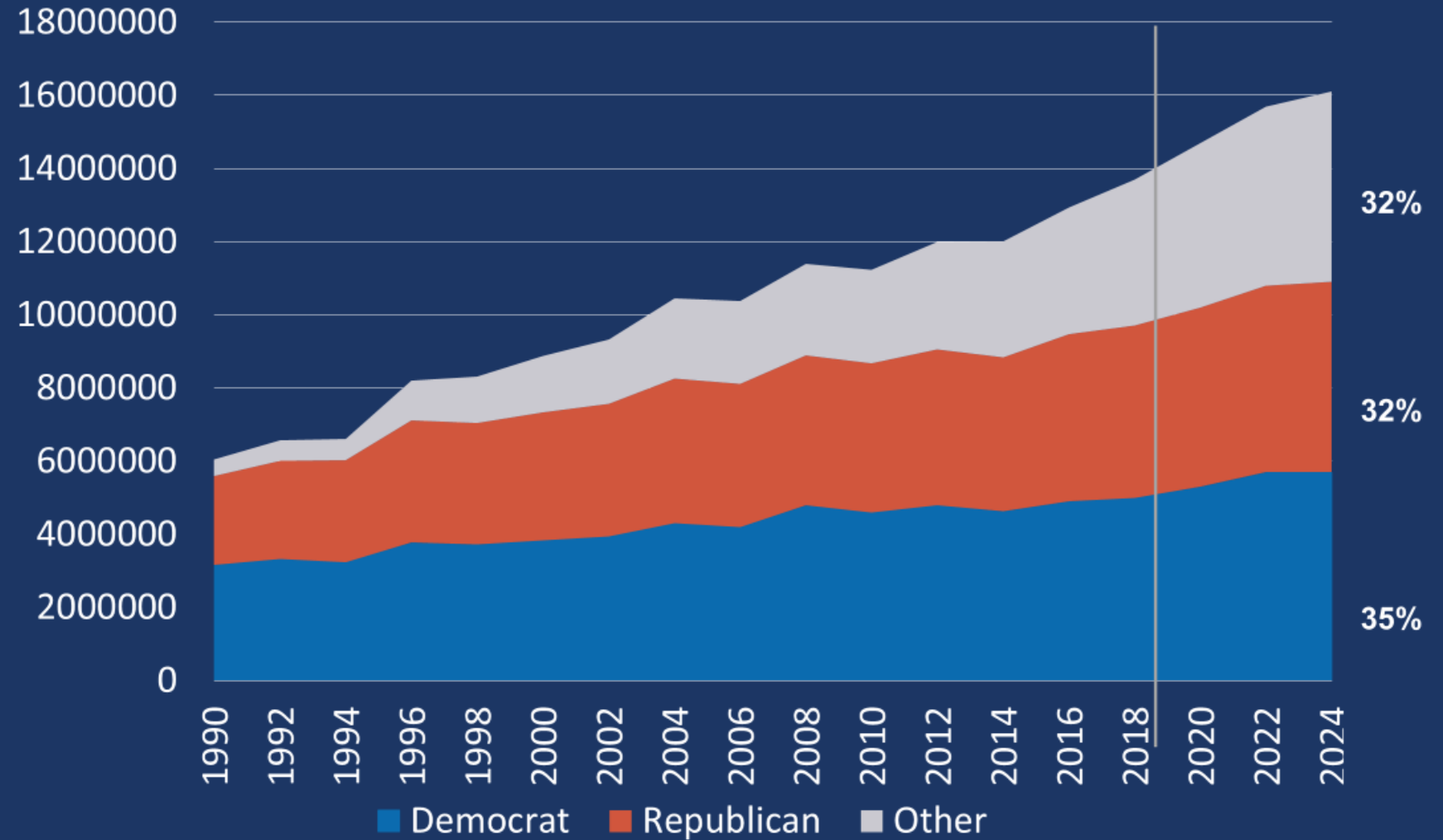
Since Last Election: 258,774



■ Republican
■ Democrat
■ NPA/Other

Voters Aren't Choosing Parties

Party
Registration
Projected
1990-2024



Changing Voter Attitudes (Right vs. Wrong Direction)

Statewide	56:28
Jacksonville	60:21
Gainesville	25:58
Tallahassee	53:31
Panama City/Pensacola	60:21
Orlando/Daytona	56:26
Tampa/St. Pete	57:27
Ft. Myers/Naples	59:28
Broward/Miami	54:32
Palm Beach	58:29

Statewide	56:28
Men	62:22
Women	51:34
Republicans	78:10
Democrats	38:42
Others	48:34
White	62:23
African-American	40:42
Hispanic	53:31

Top Voter Concerns by Media Market

Statewide	EDUCATION	ENVIRONMENT	IMMIGRATION	OTHER
	13	12	11	Jobs 10% Healthcare 8% Gun Issues 4%
Jacksonville	13	6	8	Healthcare 10%
Gainesville	25	17	17	Jobs 8%
Tallahassee	13	13	19	Jobs 19%
Panama City/Pensacola	17	5	7	Jobs 12%
Orlando/Daytona	15	10	13	Healthcare 14%
Tampa/St. Pete	13	16	10	Jobs 10%
Ft. Myers/Naples	5	13	8	Jobs 15%
Broward/Miami	8	12	14	Jobs 14%
Palm Beach	18	21	6	Gun Issues 6%

Top Voter Concerns by Demographic

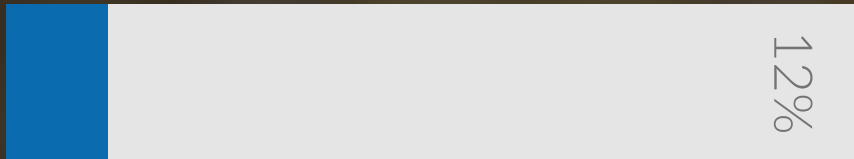
Statewide	EDUCATION	ENVIRONMENT	IMMIGRATION	OTHER
	13	12	11	Jobs 10% Healthcare 8% Gun Issues 4%
Men	10	17	10	Jobs 10%
Women	15	8	12	Healthcare 9%
Rep	7	9	20	Jobs 16%
Dem	15	15	4	Healthcare 12%
Others	21	15	7	Healthcare 9%
White	11	16	14	Jobs 9%
Black	19	4	1	Healthcare 11%
Hispanic	16	8	8	Jobs 14%

The Trump Conundrum

Favs REP



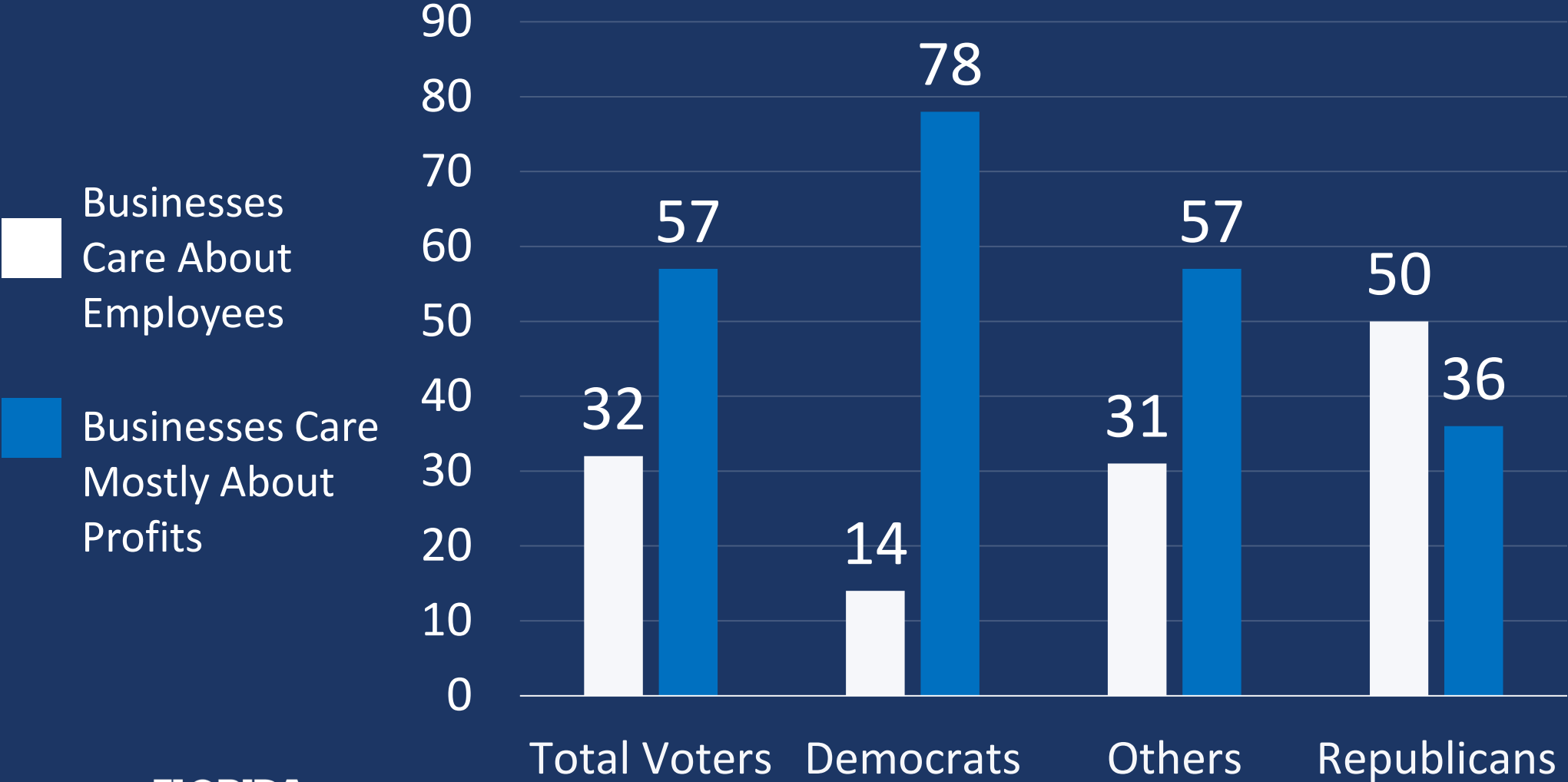
Favs DEM



Favs NPA



What Do You Think Motivates Business In Florida?



Engage Year Round

Military, Defense & Veterans Opportunities Summit

Jacksonville, FL

August 13, 2019

Future of Florida Forum and Board of Governors Annual Meeting

Orlando, FL

October 28 – October 29, 2019

Florida Chamber's Annual Insurance Summit

Miami, FL

November 4 – November 5, 2019

Upcoming Florida Chamber Board of Governors Webinars:

The State of Healthcare in Florida

Monday, September 23, 2019, 2-3 p.m. EST

To learn more, visit www.FloridaChamber.com/events

For BOG Webinars, contact Greg Blose at gblose@flchamber.com



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