



Uniting Business for Good

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

www.theFloridaScorecard.org

Thousands of data points

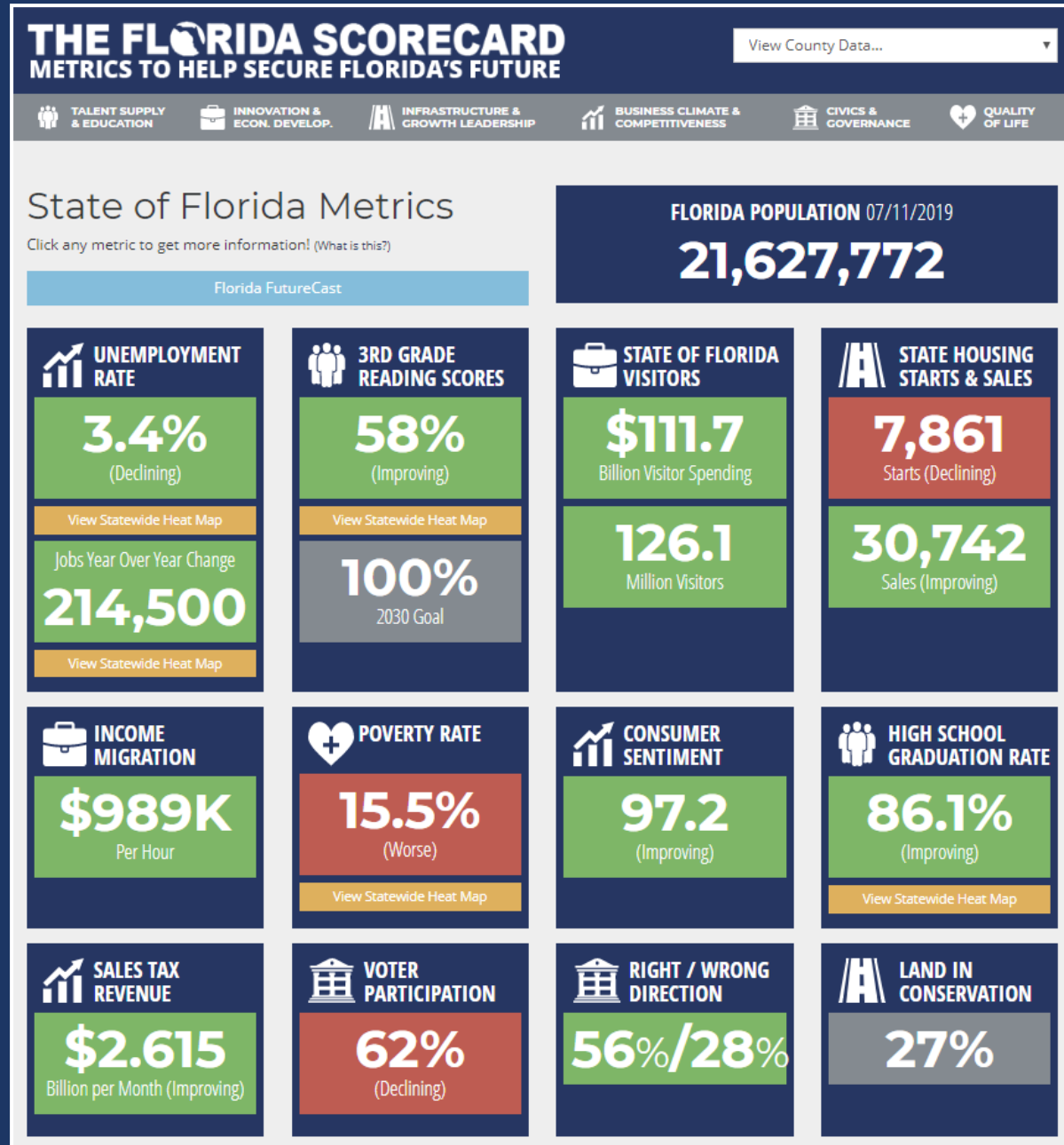
State and County Level data

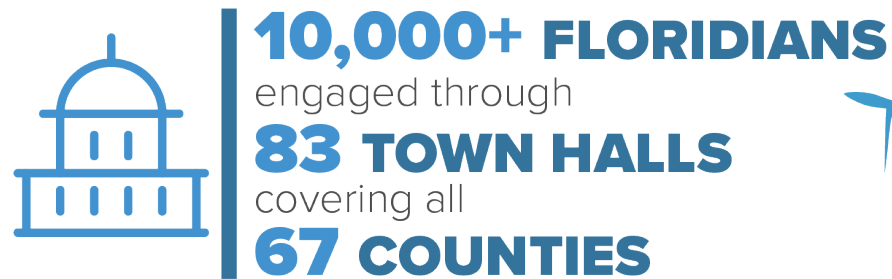
Live population counter

Downloadable Charts

Data is downloadable

Links to data sources





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**

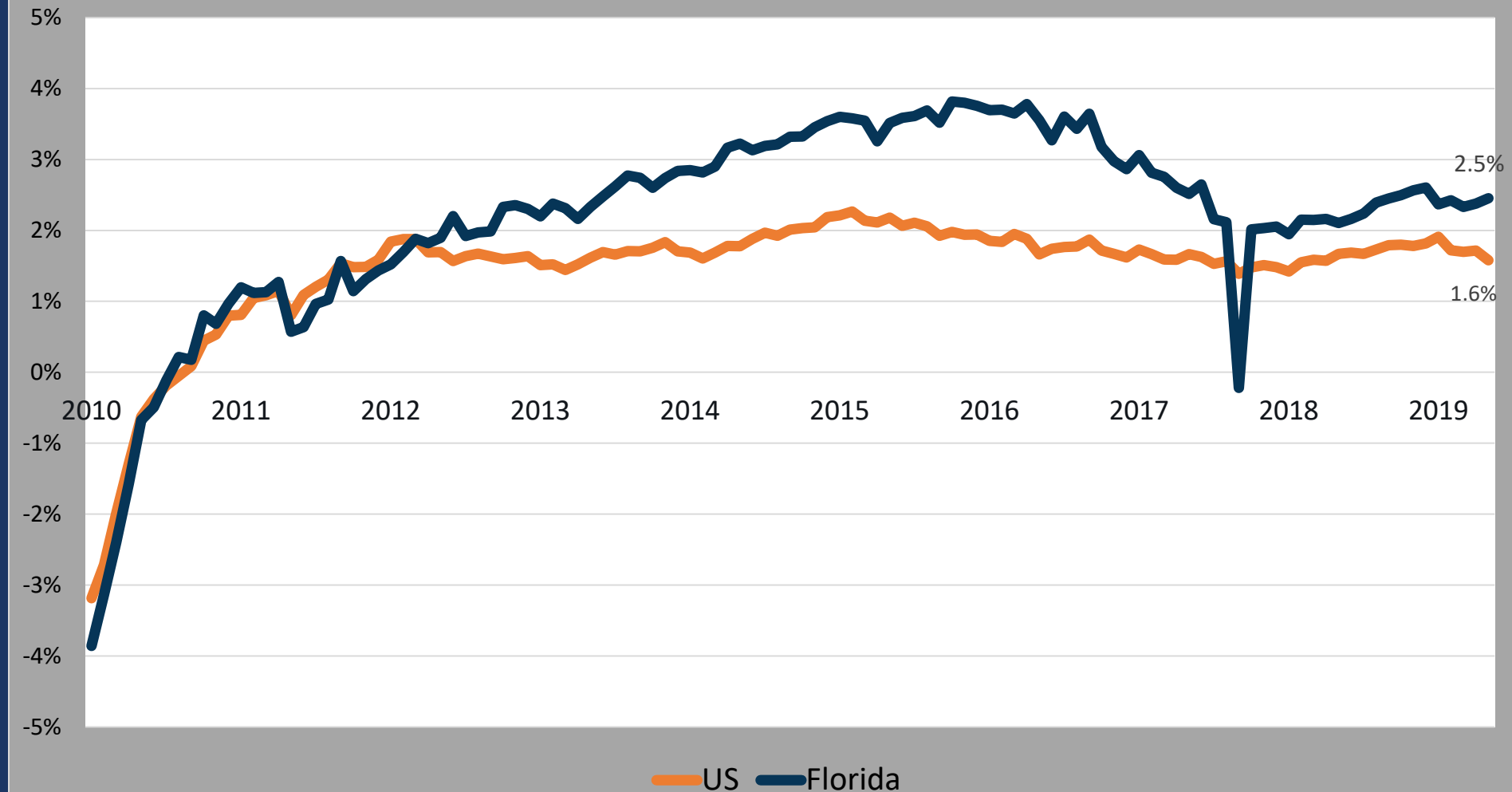
<**10%** of Florida children
live in poverty and
100% have a **pathway out**

< **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**

Florida and U.S. Job Growth Rates



Job Creation by State: 2014-2018

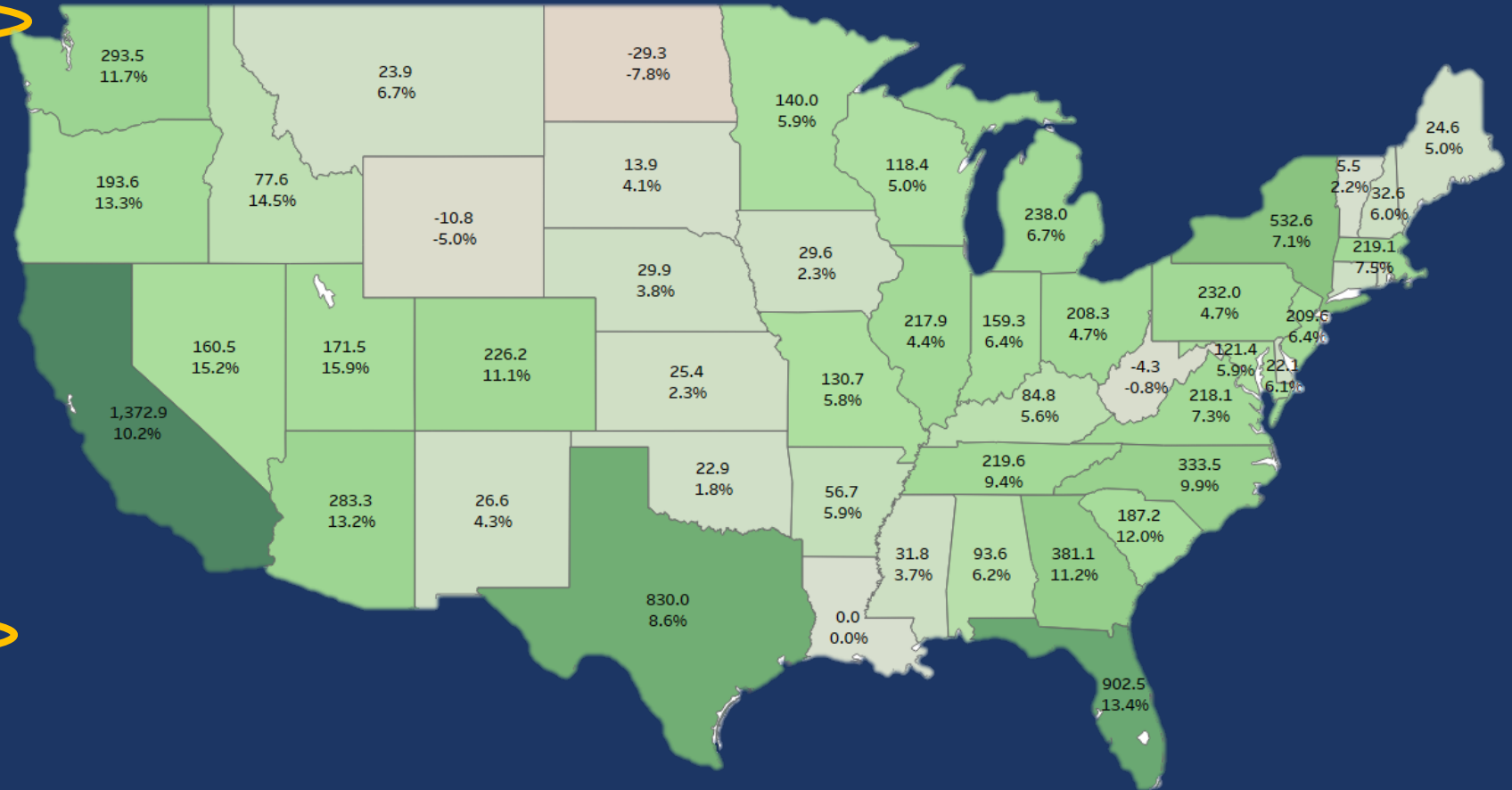
(thousands)

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 – May 2018 thru May 2019	Percent Growth
Education & Health Services	46,000	3.5%
Professional & Business Services	38,400	2.8%
Leisure & Hospitality	37,700	3.1%
Construction	28,000	5.2%
Financial Activities	21,200	3.7%
Trade, Transportation & Utilities	19,900	1.1%
Manufacturing	11,500	3.1%

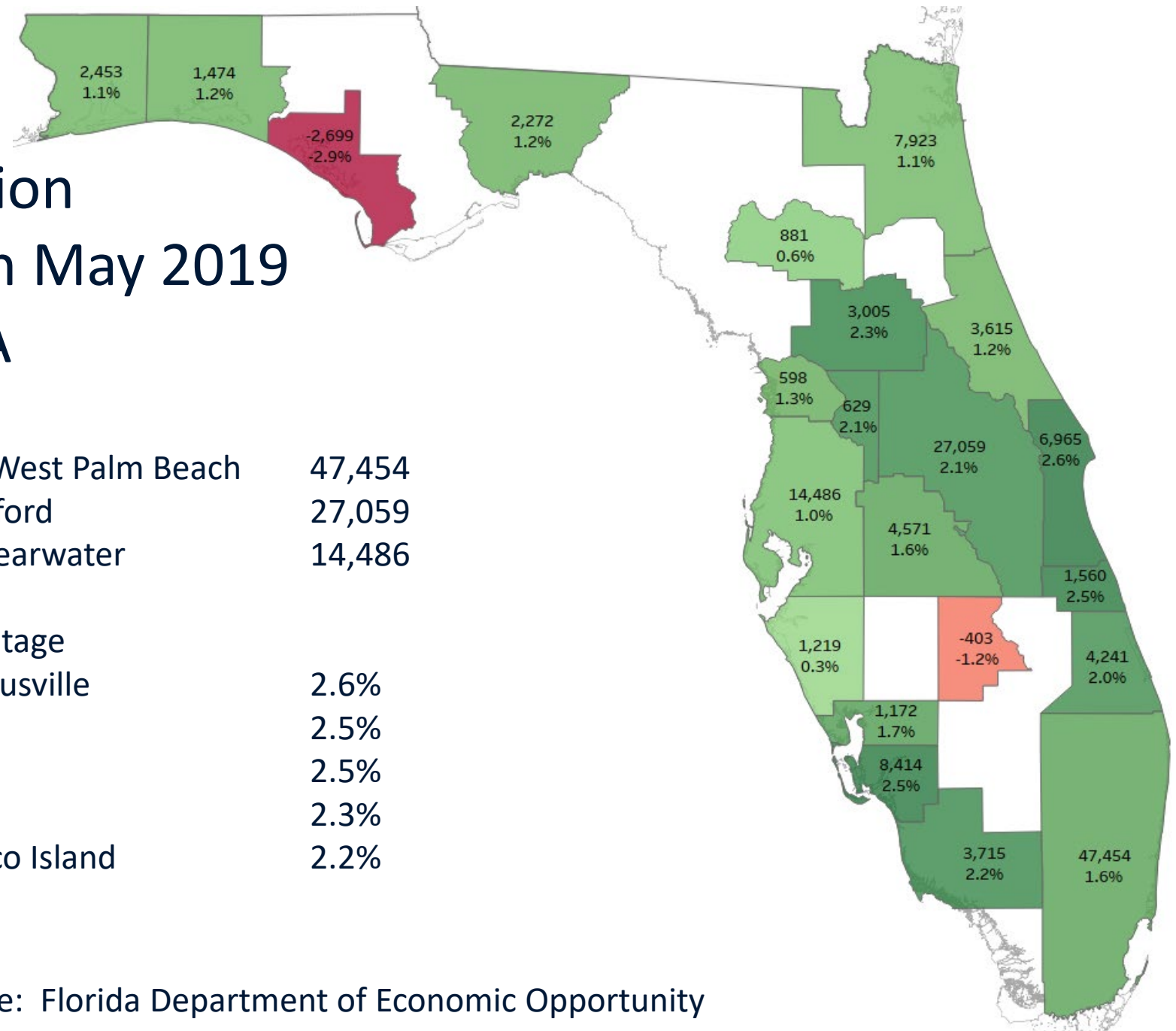
Job Creation May 2018 through May 2019 by MSA

Top MSAs for Jobs:

1. Miami-Fort Lauderdale-West Palm Beach	47,454
2. Orlando-Kissimmee-Sanford	27,059
3. Tampa-St. Petersburg-Clearwater	14,486

Top MSA Job Growth Percentage

1. Palm Bay-Melbourne-Titusville	2.6%
2. Cape Coral-Fort Myers	2.5%
3. Sebastian-Vero Beach	2.5%
4. Ocala	2.3%
5. Naples-Immokalee-Marco Island	2.2%



2019

Florida Growth Rate 2.5%

Top Counties for Job Growth

1.	Glades	3.2%
2.	Union	3.0%
3.	Okeechobee	3.0%
4.	Flagler	2.7%
5.	Brevard	2.6%
6.	Lee	2.5%
7.	Indian River	2.5%
8.	Putnam	2.5%
9.	Miami-Dade	2.4%
10.	Marion	2.3%

over the past year

Source: Florida Department of Economic Opportunity

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**FLORIDA
CHAMBER**
Foundation

Data Source: Florida Department of Economic Opportunity

Job Creation by County: 2014-18

U.S. Job Growth: 7.8%

Florida Job Growth: 13.4%

Top Counties for Jobs

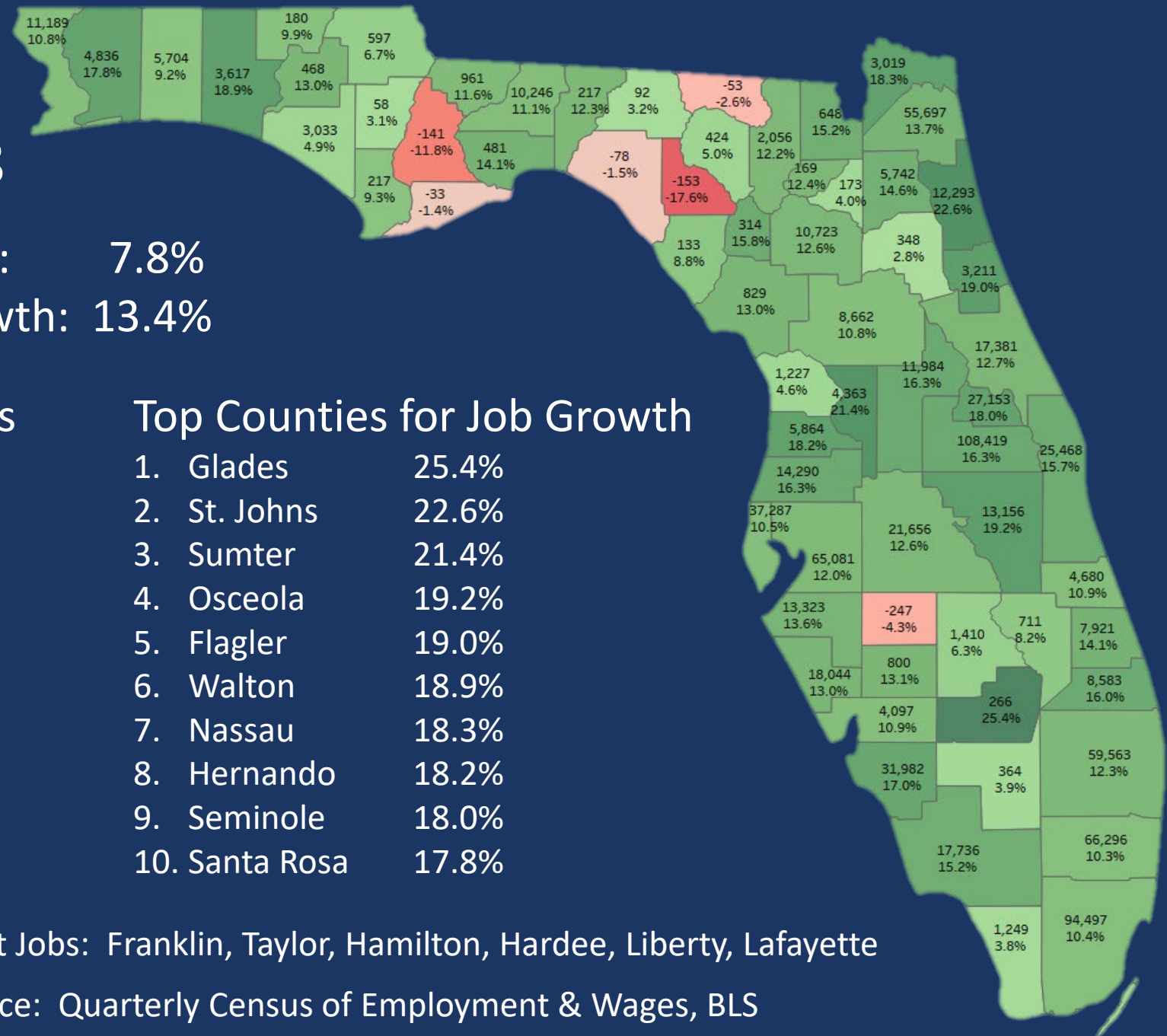
1. Orange	108,419
2. Miami-Dade	94,497
3. Broward	66,296
4. Hillsborough	65,081
5. Palm Beach	59,563
6. Duval	55,697
7. Pinellas	37,287
8. Lee	31,982
9. Seminole	27,153
10. Brevard	25,468

Top Counties for Job Growth

1. Glades	25.4%
2. St. Johns	22.6%
3. Sumter	21.4%
4. Osceola	19.2%
5. Flagler	19.0%
6. Walton	18.9%
7. Nassau	18.3%
8. Hernando	18.2%
9. Seminole	18.0%
10. Santa Rosa	17.8%

6 Florida Counties Lost Jobs: Franklin, Taylor, Hamilton, Hardee, Liberty, Lafayette

Data Source: Quarterly Census of Employment & Wages, BLS



Florida



INDUSTRY
DIVERSIFICATION

18th

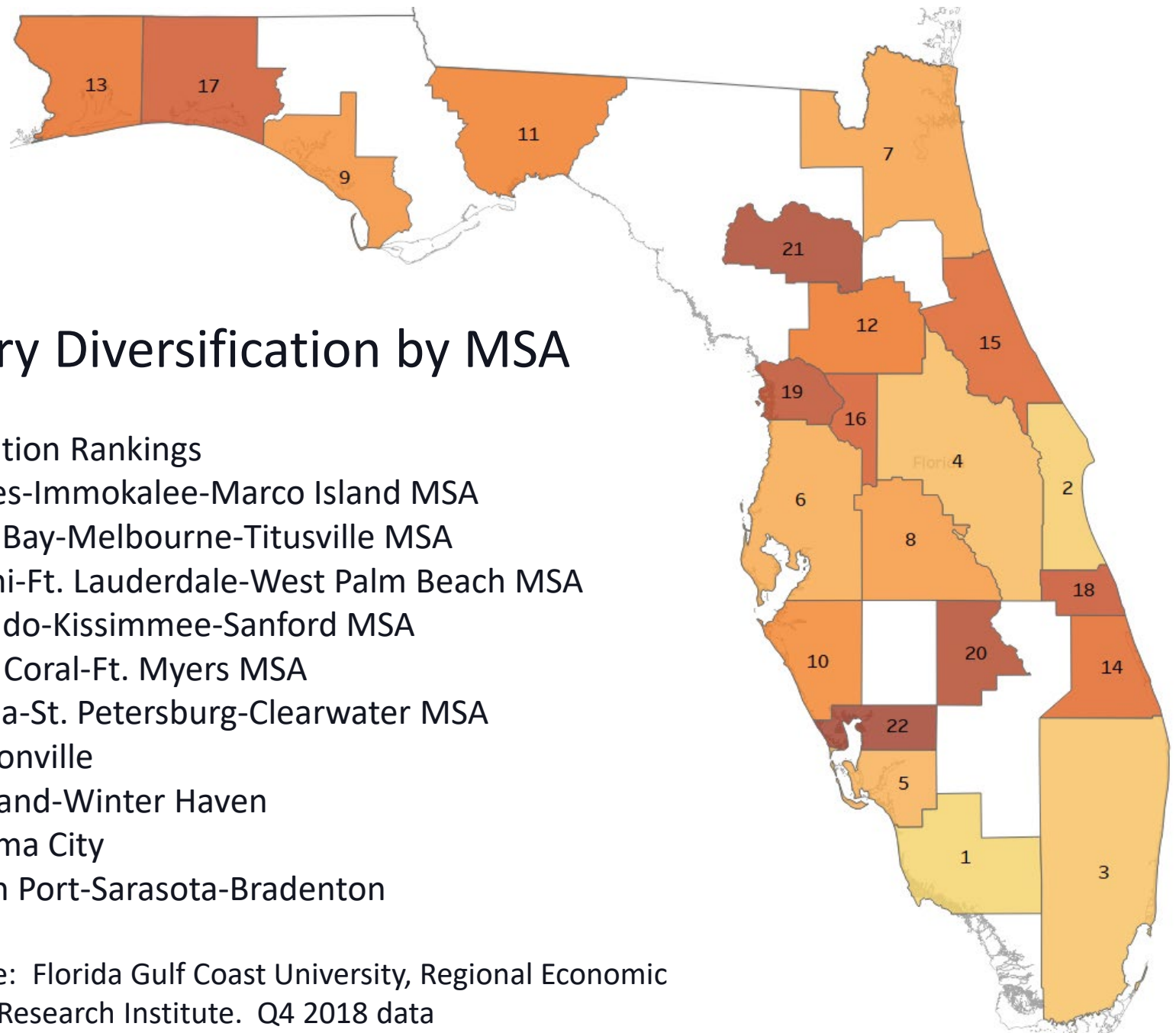
(Improving)

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

Data Source: Florida Gulf Coast University, Regional Economic
Research Institute. Q4 2018 data



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

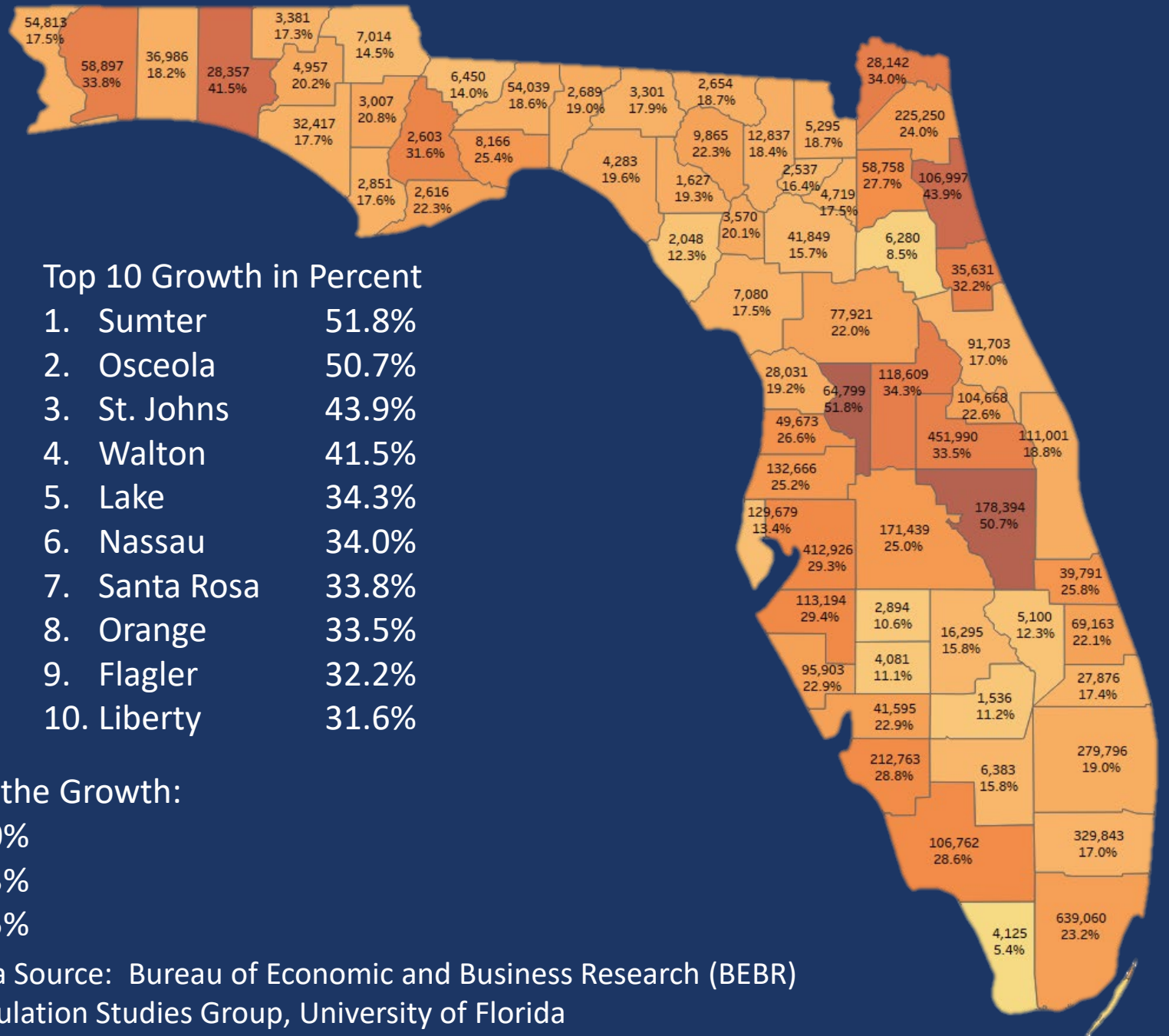
Top 10 Growth in Percent

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%

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

0%

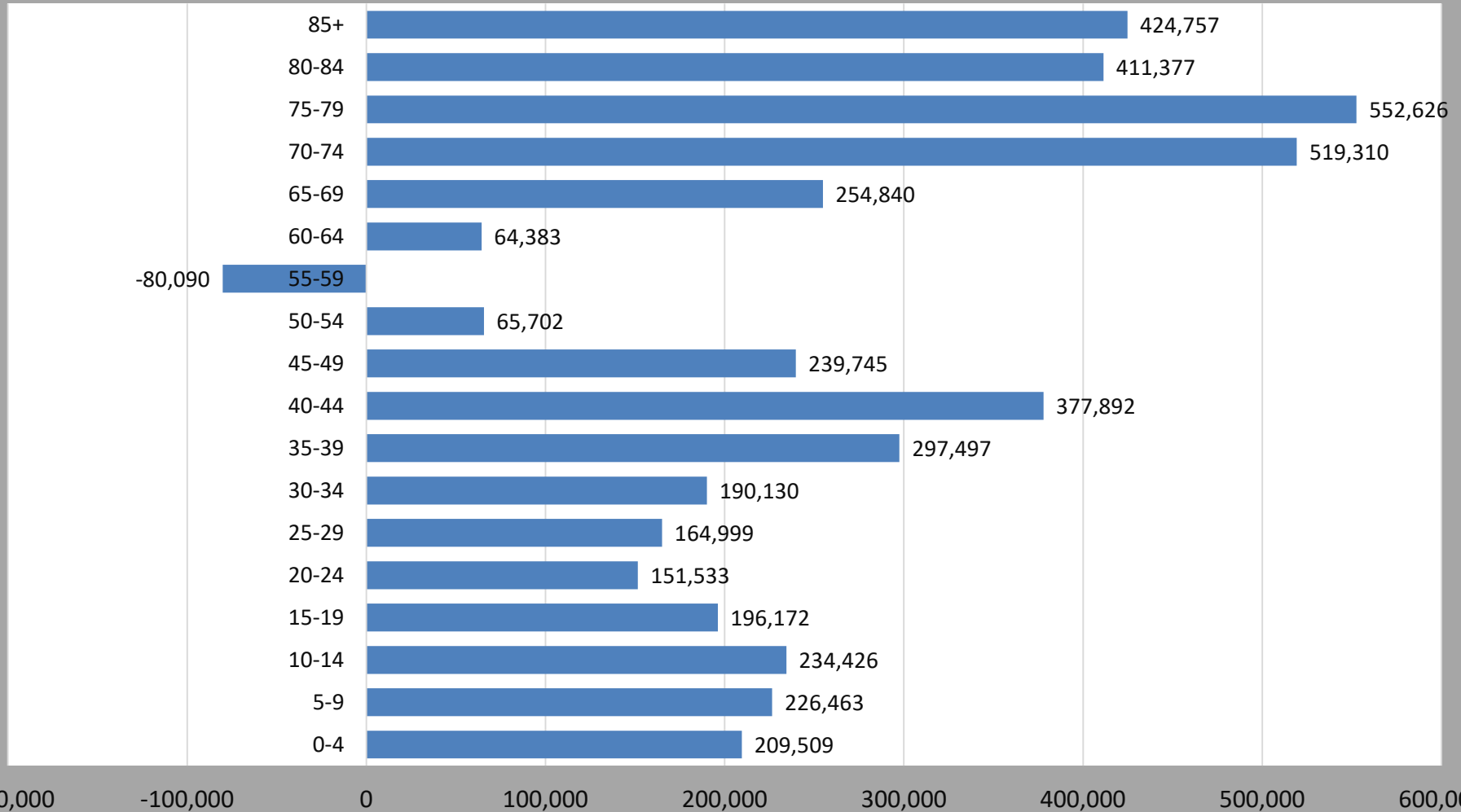
20%

40%

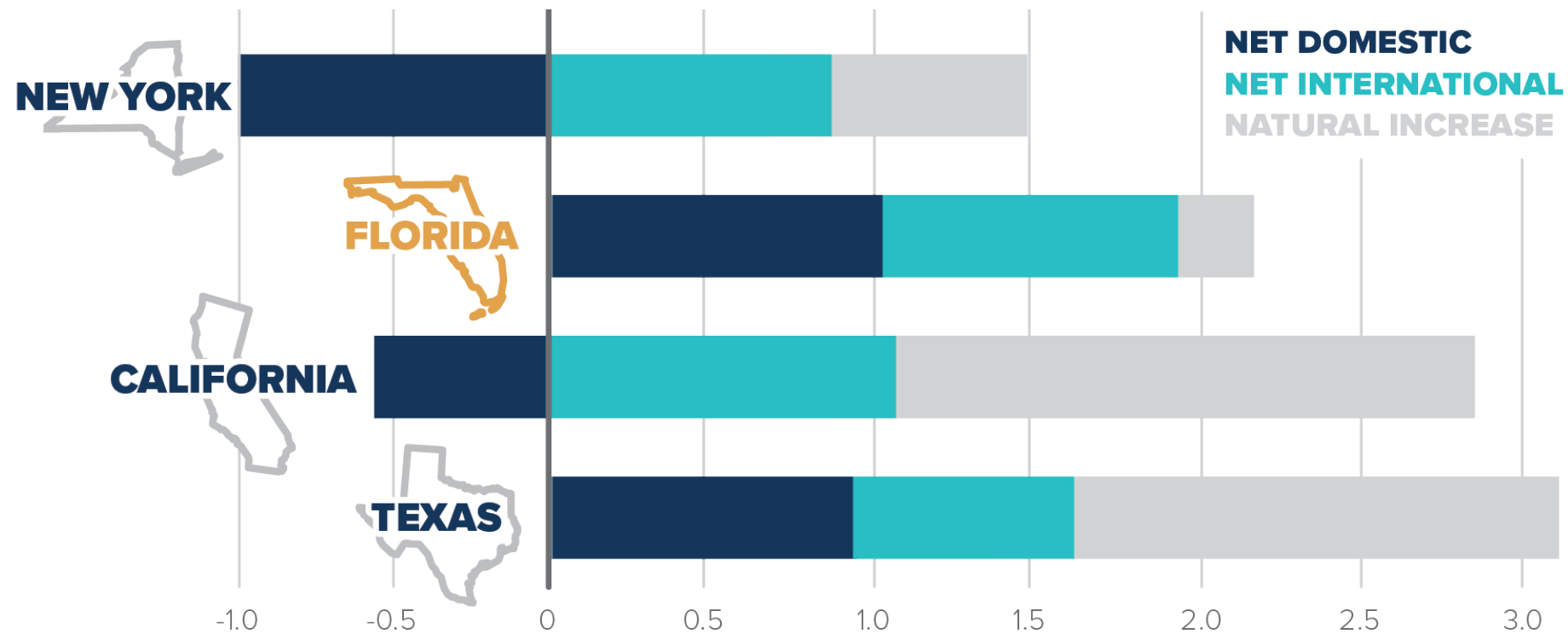
60%

80%

Florida's Next 4.5 Million People by Age Group



Where Does Florida's Growth Come From?





Florida Chamber Foundation

LESS POVERTY, MORE PROSPERITY:

The Florida Fiscal Cliffs Report



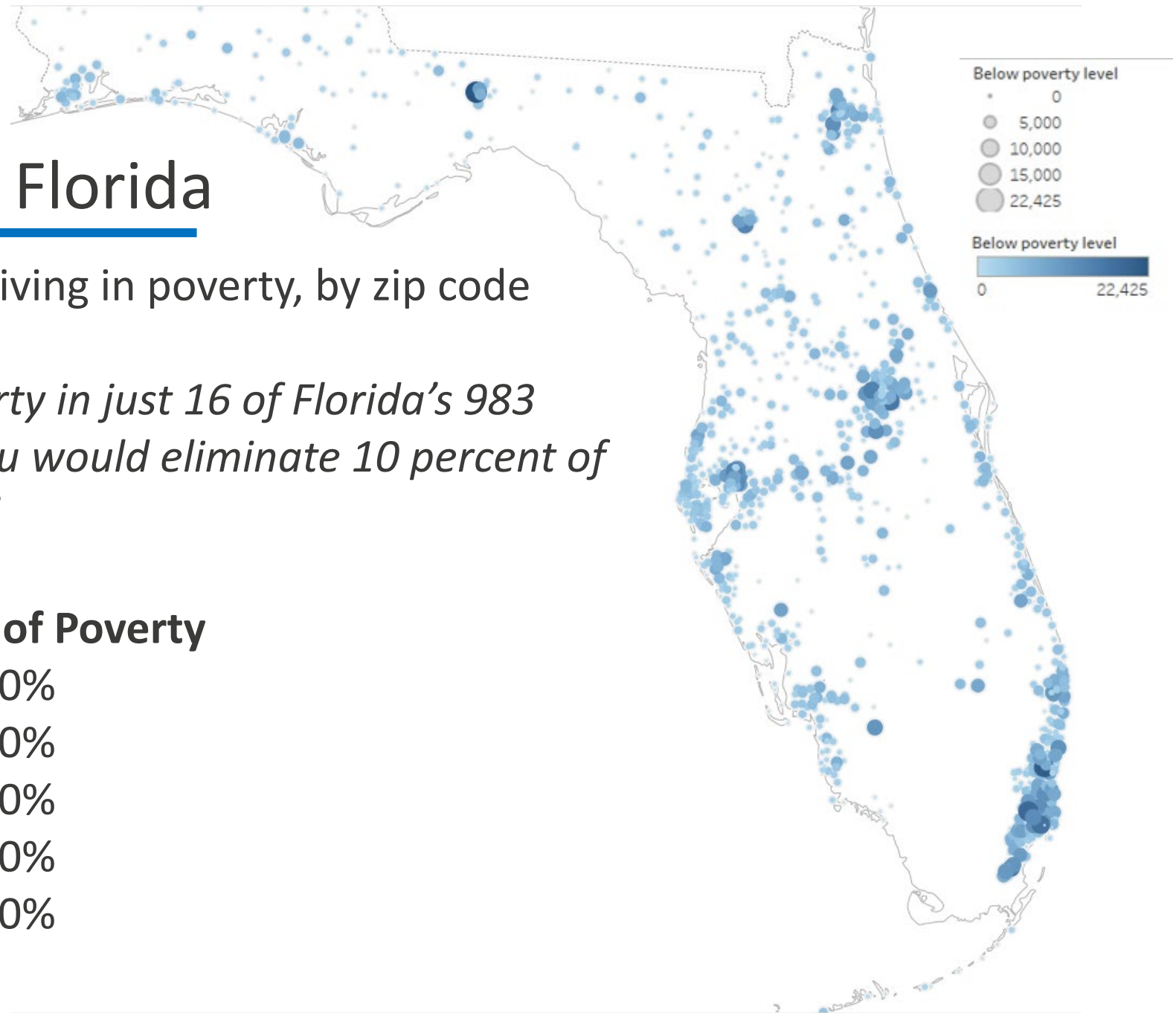
Child Poverty in Florida

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 Percent of Poverty

16	10%
39	20%
69	30%
105	40%
148	50%

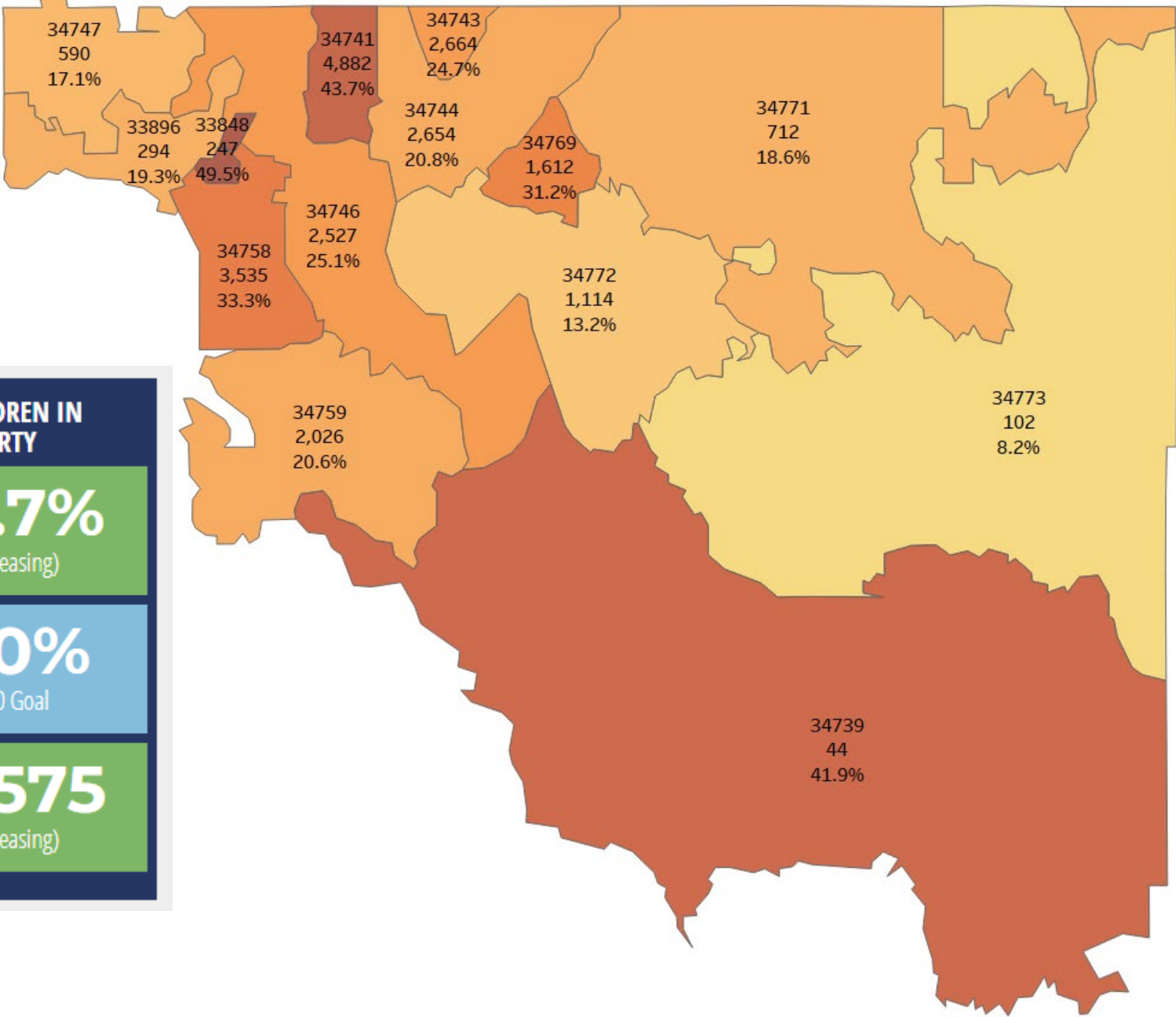
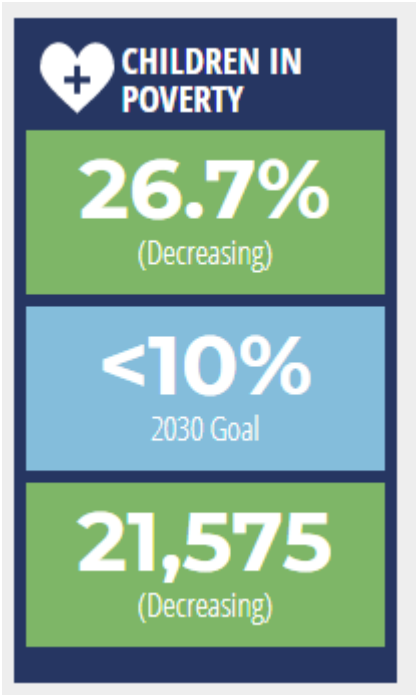


Osceola County: Under-18 Poverty

21,575 kids in
Poverty

26.7% of kids in
Osceola County

Top Number: Zip Code
Middle Number: Number of
kids in Poverty
Bottom Number: Under-18
Poverty Rate

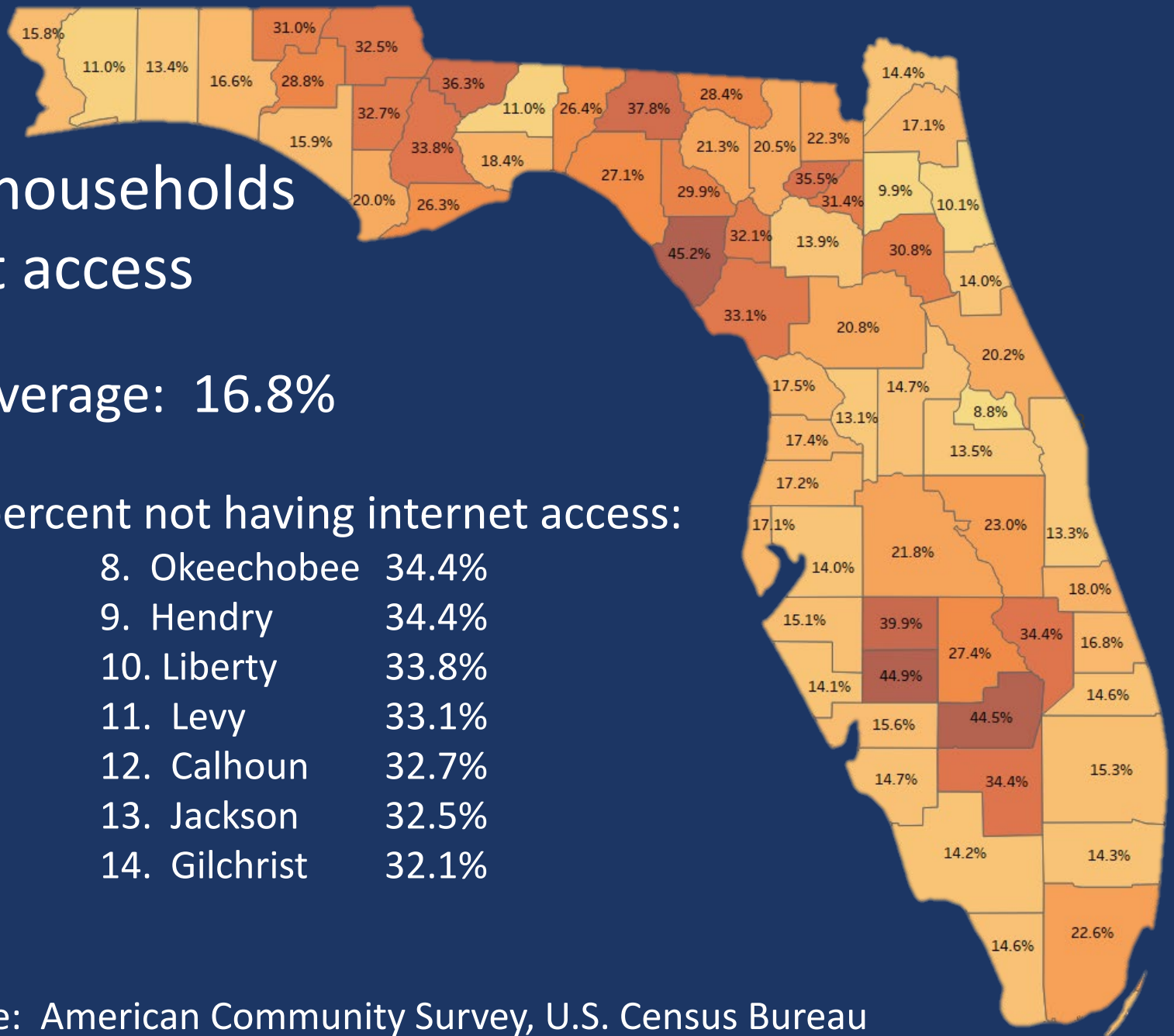


1.26 million Florida households do not have internet access

Florida Average: 16.8%

Counties with highest percent not having internet access:

1. Dixie	45.2%	8. Okeechobee	34.4%
2. Desoto	44.9%	9. Hendry	34.4%
3. Glades	44.5%	10. Liberty	33.8%
4. Hardee	39.9%	11. Levy	33.1%
5. Madison	37.8%	12. Calhoun	32.7%
6. Gadsden	36.3%	13. Jackson	32.5%
7. Union	35.5%	14. Gilchrist	32.1%



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

A Morgan Stanley economic indicator just suffered a record collapse

PUBLISHED THU, JUN 13 2019 • 2:01 PM EDT | UPDATED 2 HOURS AGO



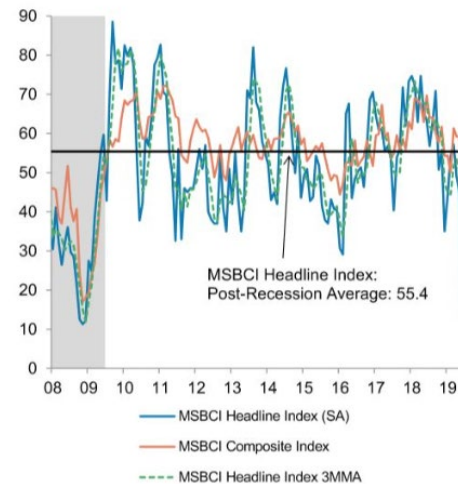
Maggie Fitzgerald
@MKMFITZGERALD

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KEY POINTS

- The Morgan Stanley Business Conditions Index fell by 32 points in June, to a level of 13 from a level of 45 in May. This drop is the largest one-month decline on record.
- “The decline shows a sharp deterioration in sentiment this month that was broad-based across sectors,” economist Ellen Zentner said in a note to clients on Thursday.
- Every subindex of the Business Conditions Composite fell in June, except for the credit condition category, which “is consistent with the recent easing in broad financial conditions,” Zentner said.

Exhibit 1: MSBCI and the MSBCI Composite: Recent Performance

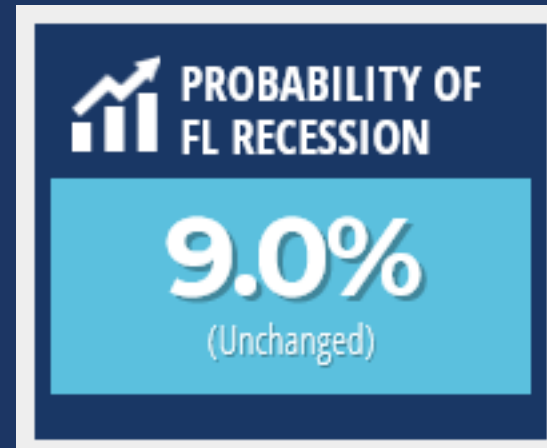


Source: Morgan Stanley Research

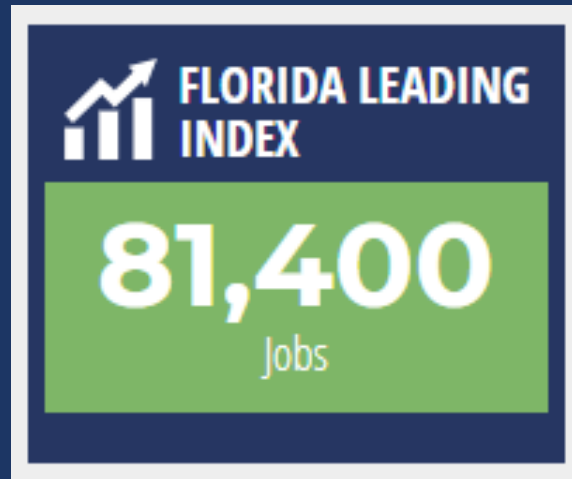
UBS: Globe is headed for recession and bear market if this week's US-China trade talks fail

The brokerage says that the globe is “one step away” from recession as the world's two largest economies head to the G-20 summit.

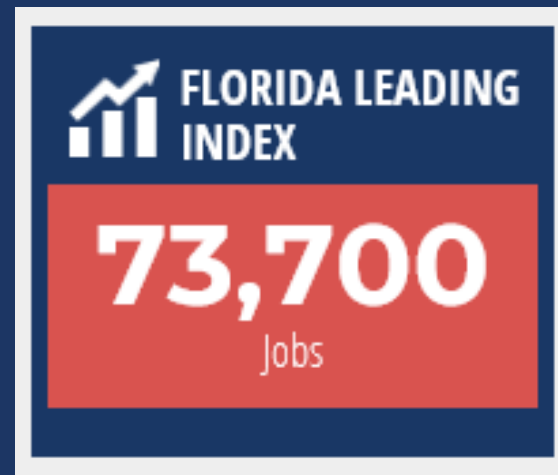
January 2018



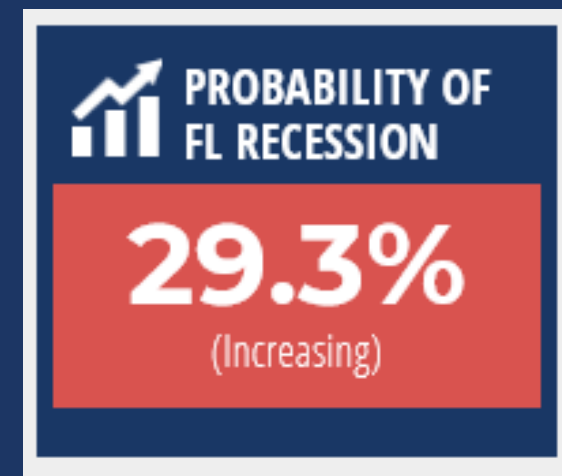
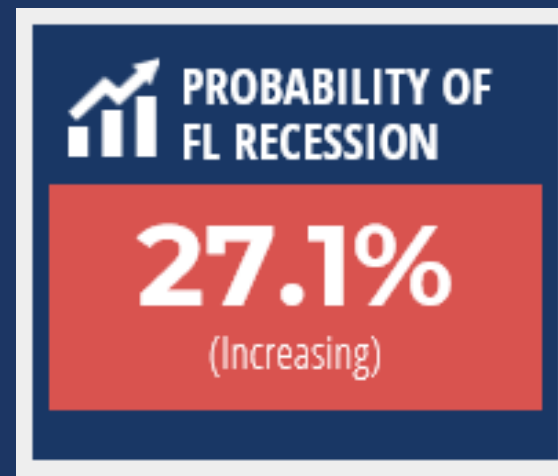
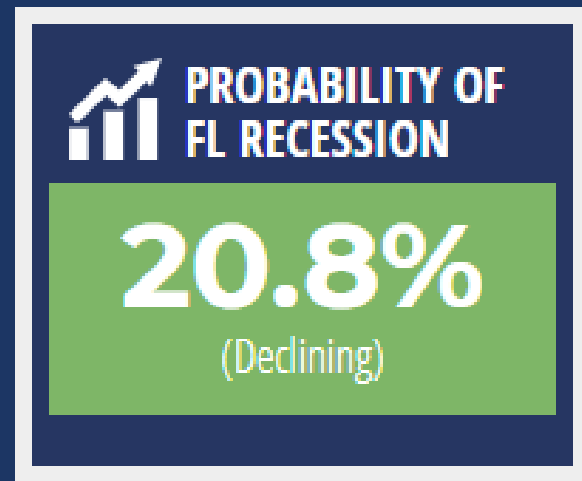
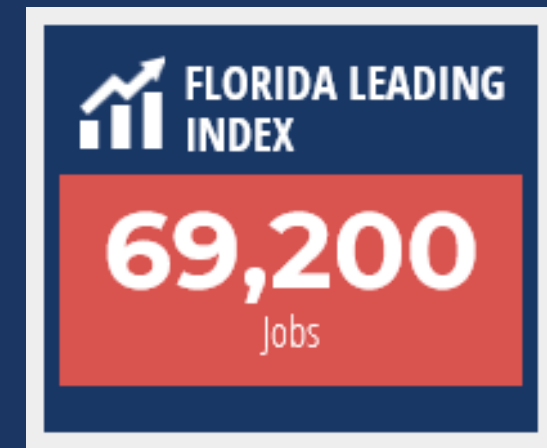
April 2019



May 2019



June 2019



Upcoming Events

Florida Chamber Foundation Military Defense & Veterans Summit

August 13-14, 2019

Hyatt Regency Jacksonville

Future of Florida Forum

October 28-29, 2019

Hyatt Regency Grand Cypress, Orlando