Citrus County Chamber of Commerce
Glenda Hood, Chair, Florida Chamber Small Business Council
Unifying The Business Community

1. Solutions (Research)
2. Actions (Lobbying & Grassroots)
3. Leadership (Elections)
The Framework For Florida’s Future

By 2030...

...26,000,000 Residents

Prosperity & High Paying Jobs

Global Competitiveness

Vibrant & Sustainable Communities

Six Pillars

Securing Florida’s Future, Together
“Florida is changing. Our economics, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson
On One Hand

- Florida’s Economy $1 Trillion GDP (17th largest in the world)
- 20.98 Million Residents (3rd / +5M by 2030 / nearly 1,000/day)
- 116.5 Million Visitors in 2017
- 3.7% Unemployment Rate
  - 383,000 people looking for jobs / 238,100 jobs looking for people
On The OTHER Hand

On The Other Hand, 3.1 Million Residents Living In Poverty- 23.5% are age 5 or under

While 57% of 3rd graders are reading at or above grade level; that means 43% are not
“Florida is changing. Our economics, our demographics and our **POLITICS** are all changing and these changes are both opportunities and challenges.” – Mark Wilson
What’s At Stake in Florida in the 2018 Election

- Governor
- Attorney General
- Chief Financial Officer
- Agriculture Commissioner

One U.S. Senate (Nelson)

All 27 Seats in Congress
  4 Open
  (DeSantis; Ross; Rooney; Ros-Lehtinen)

22 State Senate
  2 Termed
  2 Open

All 120 House Seats
  19 Termed
  14 Open

1 Supreme Court Justice
  C. Alan Lawson

Constitutional Amendments
  3 – Legislature
  2- Citizen Initiatives
  8 CRC
The Candidates

GOVERNOR

Ron DeSantis - R

Andrew Gillum - D

ATTORNEY GENERAL

Ashley Moody - R

Sean Shaw - D
The Candidates

CHIEF FINANCIAL OFFICER

Jimmy Patronis - R
Jeremy Ring - D

COMMISIONER OF AGRICULTURE

Matt Caldwell - R
Nikki Fried - D
United States Senate Candidates

Rick Scott

Bill Nelson
Constitutional Amendments

- Constitution Revision Commission:
  Eight proposals made it to the final ballot. Full list of proposals are on floridachamber.com/crc

- Paid Petition Initiatives:
  - Voter Approval of Casino Gambling
  - Restoration of voting rights for those with prior felony convictions

- Legislative Initiatives
  - Homestead Exemption
  - Cap on non-homestead assessments
  - 2/3\textsuperscript{rd}s to raise taxes/fees by Legislature

www.floridachamber.com/Amendments

The Florida Chamber Supports:
Amendments 2,3,5 & 11*

The Florida Chamber Opposes:
Amendment 9*

* Denotes challenge at Florida Supreme Court
New Voters By County (Florida v. Citrus County)

Statewide Since Last Election

- NPA 43%
- Republican 28%
- Democrat 29%

Citrus County Since Last Election

- NPA 43%
- NPA/Other 36%
- Republican 21%
Map Shaded by New Voters/Total Voters

<table>
<thead>
<tr>
<th>Statewide</th>
<th>4,689,873</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>2,144,285 (46%)</td>
</tr>
<tr>
<td>Women</td>
<td>2,304,430 (49%)</td>
</tr>
<tr>
<td>Republicans</td>
<td>1,332,711 (28%)</td>
</tr>
<tr>
<td>Democrats</td>
<td>1,536,672 (33%)</td>
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<tr>
<td>NPA/Others</td>
<td>1,820,490 (39%)</td>
</tr>
<tr>
<td>White</td>
<td>2,680,961 (57%)</td>
</tr>
<tr>
<td>Black</td>
<td>586,273 (13%)</td>
</tr>
<tr>
<td>Hispanics</td>
<td>586,273 (13%)</td>
</tr>
</tbody>
</table>

Scott Era: New Voters Since 2010

Map shaded by new voters/total voters:
- 1 in 2 new voters
- 1 in 3 new voters
- 1 in 4 new voters
- 1 in 5+ new voters
Floridians Are Changing The Way They Vote

Vote Share by Ballot Method

- Election Day
- Early Vote
- Vote by Mail

% of Total Votes Cast

<table>
<thead>
<tr>
<th>Year</th>
<th>Election Day</th>
<th>Early Vote</th>
<th>Vote by Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>70.0</td>
<td>15.0</td>
<td>15.0</td>
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<tr>
<td>2006</td>
<td>60.0</td>
<td>20.0</td>
<td>20.0</td>
</tr>
<tr>
<td>2008</td>
<td>50.0</td>
<td>25.0</td>
<td>25.0</td>
</tr>
<tr>
<td>2010</td>
<td>40.0</td>
<td>30.0</td>
<td>30.0</td>
</tr>
<tr>
<td>2012</td>
<td>30.0</td>
<td>40.0</td>
<td>30.0</td>
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<tr>
<td>2014</td>
<td>25.0</td>
<td>35.0</td>
<td>40.0</td>
</tr>
<tr>
<td>2016</td>
<td>20.0</td>
<td>30.0</td>
<td>50.0</td>
</tr>
</tbody>
</table>

Election Year
### Right Direction vs. Wrong Track

<table>
<thead>
<tr>
<th>Statewide</th>
<th>47:37</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>52:38</td>
</tr>
<tr>
<td>Women</td>
<td>42:36</td>
</tr>
<tr>
<td>Republicans</td>
<td>75:14</td>
</tr>
<tr>
<td>Democrats</td>
<td>21:60</td>
</tr>
<tr>
<td>Others</td>
<td>45:35</td>
</tr>
<tr>
<td>White</td>
<td>52:34</td>
</tr>
<tr>
<td>Black</td>
<td>23:51</td>
</tr>
<tr>
<td>Hispanic</td>
<td>55:30</td>
</tr>
</tbody>
</table>

### Top Voter Concerns

<table>
<thead>
<tr>
<th>Statewide</th>
<th>Environment</th>
<th>Jobs</th>
<th>Education</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide</td>
<td>14</td>
<td>13</td>
<td>12</td>
<td>Healthcare 11%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Immigration 6%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Water Issues 4%</td>
</tr>
<tr>
<td>Men</td>
<td>14</td>
<td>16</td>
<td>7</td>
<td>Healthcare 10%</td>
</tr>
<tr>
<td>Women</td>
<td>14</td>
<td>10</td>
<td>16</td>
<td>Healthcare 11%</td>
</tr>
<tr>
<td>Republicans</td>
<td>11</td>
<td>20</td>
<td>9</td>
<td>Immigration 12%</td>
</tr>
<tr>
<td>Democrats</td>
<td>16</td>
<td>6</td>
<td>16</td>
<td>Healthcare 16%</td>
</tr>
<tr>
<td>NPA/Others</td>
<td>16</td>
<td>13</td>
<td>9</td>
<td>Healthcare 12%</td>
</tr>
<tr>
<td>White</td>
<td>17</td>
<td>13</td>
<td>10</td>
<td>Healthcare 9%</td>
</tr>
<tr>
<td>Black</td>
<td>6</td>
<td>6</td>
<td>22</td>
<td>Healthcare 15%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>10</td>
<td>22</td>
<td>11</td>
<td>Healthcare 12%</td>
</tr>
</tbody>
</table>
“Florida is changing. Our economics, our DEMOGRAPHICS and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson
Population Changes by Age Group 2016-2030

Highest Growth Rates in Age 65+ Categories: Increase of 2+ million in Florida by 2030

Loss of Potential High Spenders in Age 50-59: 160,745 Fewer people in 2030
<table>
<thead>
<tr>
<th>Age Group</th>
<th>Expected Change in Population by 2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>85+ (+67.8%)</td>
<td>4,512</td>
</tr>
<tr>
<td>80-84 (+39.0%)</td>
<td>3,849</td>
</tr>
<tr>
<td>75-79 (+38.6%)</td>
<td>3,383</td>
</tr>
<tr>
<td>70-74 (+26.8%)</td>
<td>2,552</td>
</tr>
<tr>
<td>65-69 (+7.2%)</td>
<td>972</td>
</tr>
<tr>
<td>60-64 (-6.1%)</td>
<td>-89</td>
</tr>
<tr>
<td>55-59 (-23.1%)</td>
<td>-2,799</td>
</tr>
<tr>
<td>50-54 (-9.1%)</td>
<td>-889</td>
</tr>
<tr>
<td>45-49 (+8.8%)</td>
<td>660</td>
</tr>
<tr>
<td>40-44 (+37.0%)</td>
<td>2,282</td>
</tr>
<tr>
<td>35-39 (+21.3%)</td>
<td>1,178</td>
</tr>
<tr>
<td>30-34 (+3.4%)</td>
<td>190</td>
</tr>
<tr>
<td>25-29 (+1.7%)</td>
<td>96</td>
</tr>
<tr>
<td>20-24 (-3.6%)</td>
<td>-207</td>
</tr>
<tr>
<td>15-19 (+9.1%)</td>
<td>545</td>
</tr>
<tr>
<td>10-14 (+14.9%)</td>
<td>932</td>
</tr>
<tr>
<td>5-9 (+11.6%)</td>
<td>697</td>
</tr>
<tr>
<td>0-4 (+11.7%)</td>
<td>624</td>
</tr>
</tbody>
</table>

Citrus County Expected Change in Population by 2030
Florida’s Next 5 Million People
Population Increase by County

Heat map on population growth rate

Top 8 Counties expected to account for 58.5% of Population Growth

Rank for New Residents          Rank for Growth Rate
1. Miami-Dade                  1. Osceola
2. Orange                     2. Sumter
5. Palm Beach                 5. Flagler
7. Duval                      7. Lake
8. Osceola                    8. Lee

FLORIDA CHAMBER
Foundation
“Florida is changing. Our ECONOMICS, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson
Percent of Counties, by state, who had more jobs in 2017 than they did in 2007

Data Source: Bureau of Labor Statistics, QCEW Annual Data

U.S. Average: 46.8%
Florida: 61.2%
**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%

Data Source: Bureau of Labor Statistics, QCEW Annual Data
Year over Year Jobs Creation - Florida
(Thousands)

April 2016
Citrus County

Citrus County Historic Unemployment Rate

Date

Unemployment Rate

5.4% (Declining)
With Disability (2014) 24.4%
Jobs Year Over Year Change 158
View Statewide Heat Map
Economics: Income Migration

Florida: $879K Per Hour

Citrus County: $100.00 Million per Year
By 2030...

26,000,000 Residents

Prosperity & High Paying Jobs

Global Competitiveness  
Vibrant & Sustainable Communities

Talent Supply and Education

- Early Learning
- K-12
- Higher Education
- Workforce Training

SIX PILLARS
SECURING FLORIDA’S FUTURE, TOGETHER
Talent Supply and Education

HIGH SCHOOL GRADUATION RATE
82.3% (Improving)

EDUCATIONAL ATTAINMENT
37.4% AA (Improving)
27.8% Bachelor (Improving)

View Statewide Heat Map

www.FloridaChamber.com/EarlyLearning
By 2030...

...26,000,000 Residents

Prosperity & High Paying Jobs

Global Competitiveness

Vibrant & Sustainable Communities

- Florida’s Economic Portfolio
- Innovation Economy
- Entrepreneurism
- Capital & Investments
- Global Trade

SIX PILLARS
SECURING FLORIDA’S FUTURE, TOGETHER
## Creating Jobs By Diversifying Florida’s Economy

**The Florida Scorecard**

**Metrics to Help Secure Florida’s Future**

### State of Florida Metrics (2017 Rank)

- **Patents Granted**: 24,433
- **Gross Domestic Product**: $996.28 Billion
- **Venture Capital**: $2,139.30 Billion (Ranking)
- **State of Florida Visitors**: 116.5 Million Visits
- **GDP Per Capita**: $44,928

### Additional Metrics

- **Imports & Exports**
  - **Imports**: $55.0 Billion
  - **Exports**: $75.4 Billion

- **Location & Labor**
  - **Employment by Foreign Companies**: 327.2 Thousand
  - **Revenue Per Hour**: $879K

- **Top 6 Importers**
  - **Top 6 Importers**: 31.2% (Ranking)

- **Industry Diversification**
  - **Top 10 Countries**: 14.155

- **Other Metrics**
  - **Cruise Passengers**: 16.1 Million (Ranking)
  - **Florida Exchange Rate**: 81.01

**Florida Chamber Foundation**
Innovation and Economic Development

Industry Diversification

20th (Improving)

Industry Diversification

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015 Q4</td>
<td>22</td>
</tr>
<tr>
<td>2016 Q1</td>
<td>22</td>
</tr>
<tr>
<td>2016 Q2</td>
<td>23</td>
</tr>
<tr>
<td>2016 Q3</td>
<td>23</td>
</tr>
<tr>
<td>2016 Q4</td>
<td>23</td>
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<tr>
<td>2017 Q1</td>
<td>23</td>
</tr>
<tr>
<td>2017 Q2</td>
<td>23</td>
</tr>
<tr>
<td>2017 Q3</td>
<td>23</td>
</tr>
<tr>
<td>2017 Q4</td>
<td>23</td>
</tr>
<tr>
<td>2018 Q1</td>
<td>23</td>
</tr>
</tbody>
</table>

- Florida Chamber Foundation
SIX PILLARS
SECURING FLORIDA’S FUTURE, TOGETHER
Preparing Florida’s Infrastructure For Smart Growth

- 20% More Water
- 4-5 Million More Drivers
- 50 Million More Visitors
- 5 Million More Residents
- Autonomous/Drones
By 2030...

Prosperity & High Paying Jobs

Global Competitiveness

Vibrant & Sustainable Communities

- Taxes
- Regulation
- Legal Reform
- Permitting
- Property Rights
- Workplace & Employment Issues
- Insurance

...26,000,000 Residents

SIX PILLARS
SECURING FLORIDA’S FUTURE, TOGETHER
Making Florida’s Business Climate More Competitive

The Florida Scorecard: Metrics to Help Secure Florida’s Future

State of Florida Metrics (as of 2022)
Business Climate & Competitiveness

- **Florida Leading Index**: 75,200 jobs
- **Consumer Sentiment**: 98.3 (unchanged)
- **CEO Rank**: 2nd (unchanged)
- **State Legal Climate Ranking**: 46th (unchanged)
- **Sales Tax Revenue**: $2.528 Billion per Month (declining)
- **Business Tax Climate**: 4th
- **Leading and Coincident Indices**: 1.91 (Leading Index (improving))
- **Unemployed Persons**: 383,000 (unchanging)
- **Open Jobs**: 238,100 (declining)

Florida Chamber Foundation
## Making Florida’s Business Climate More Competitive

### State Lawsuit Climate Report

<table>
<thead>
<tr>
<th>Year</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>#46</td>
</tr>
<tr>
<td>2015</td>
<td>#44</td>
</tr>
<tr>
<td>2012</td>
<td>#41</td>
</tr>
</tbody>
</table>

### NERA Study: Impact of Lawsuit Reform

- **$2,833** Potential Tort Cost Reduction ($1,000,000)
- **0.73% - 1.98%** Potential Increase in Employment

Source: [https://www.instituteforlegalreform.com/states/florida](https://www.instituteforlegalreform.com/states/florida)
By 2030...

- Florida’s Budget
- Government Systems
- Federal Issues
- Local Government Issues
- Regional Stewardship
- Public/Private Partnerships
- Ethics & Elections
- Florida’s Constitution
- Civic Infrastructure

SIX PILLARS
SECURING FLORIDA’S FUTURE, TOGETHER

...26,000,000 Residents

Global Competitiveness

Vibrant & Sustainable Communities

Civic and Governance Systems
Making Government More Efficient

• 405/67/34

• 67 Counties

• $88.7 Billion State Budget
Civic and Governance Systems

**Underfunded State Pension**

$1,100.0 Million (Increasing)

**Graph: Underfunded State Pension**

- Year: 2010-11 to 2017-18
- Payment (in millions): 0 to 1.2K

Annual payment transferred from the Florida Budget to the Florida Retirement System to reduce the unfunded actuarial liability (UAL) in the pension plan for state employees.

Source: The Florida Budget
• Health & Wellness
• Retirement & Lifelong Engagement
• Safety & Security
• Housing & Livability
• Families & Children
• Retirement & Lifelong Engagement
• Economic Opportunity & Prosperity
• Sense of Place & Community
• Opposing Gambling Expansion

SIX PILLARS
SECURING FLORIDA’S FUTURE, TOGETHER
Championing Florida’s Quality of Life

- Healthcare is 1/6th of our Economy
- Medicaid is 32.1% of the budget
- Education is 29.3% of the budget
Florida Poverty Rate

Florida:
14.0% (Better)
View Statewide Heat Map

Citrus County:
13.6% (Better)
View Statewide Heat Map
Join Us

- Florida Chamber’s Annual Insurance Summit – November 27 - 29, 2018, Miami

- Florida Chamber Foundation’s Transportation and Infrastructure Summit – December 11, 2018, Babcock Ranch

- Florida Chamber’s Legislative Fly-In – February 19 – 21, 2019, Tallahassee

- Florida Chamber Foundation’s Prosperity Summit - May 2019

www.FloridaChamber.com/events