North Central Florida Regional Planning Council

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Hamilton • Lafayette • Madison
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2009 NW 67th Place, Gainesville, FL 32653-1603 • 352.955.2200

MEETING NOTICE

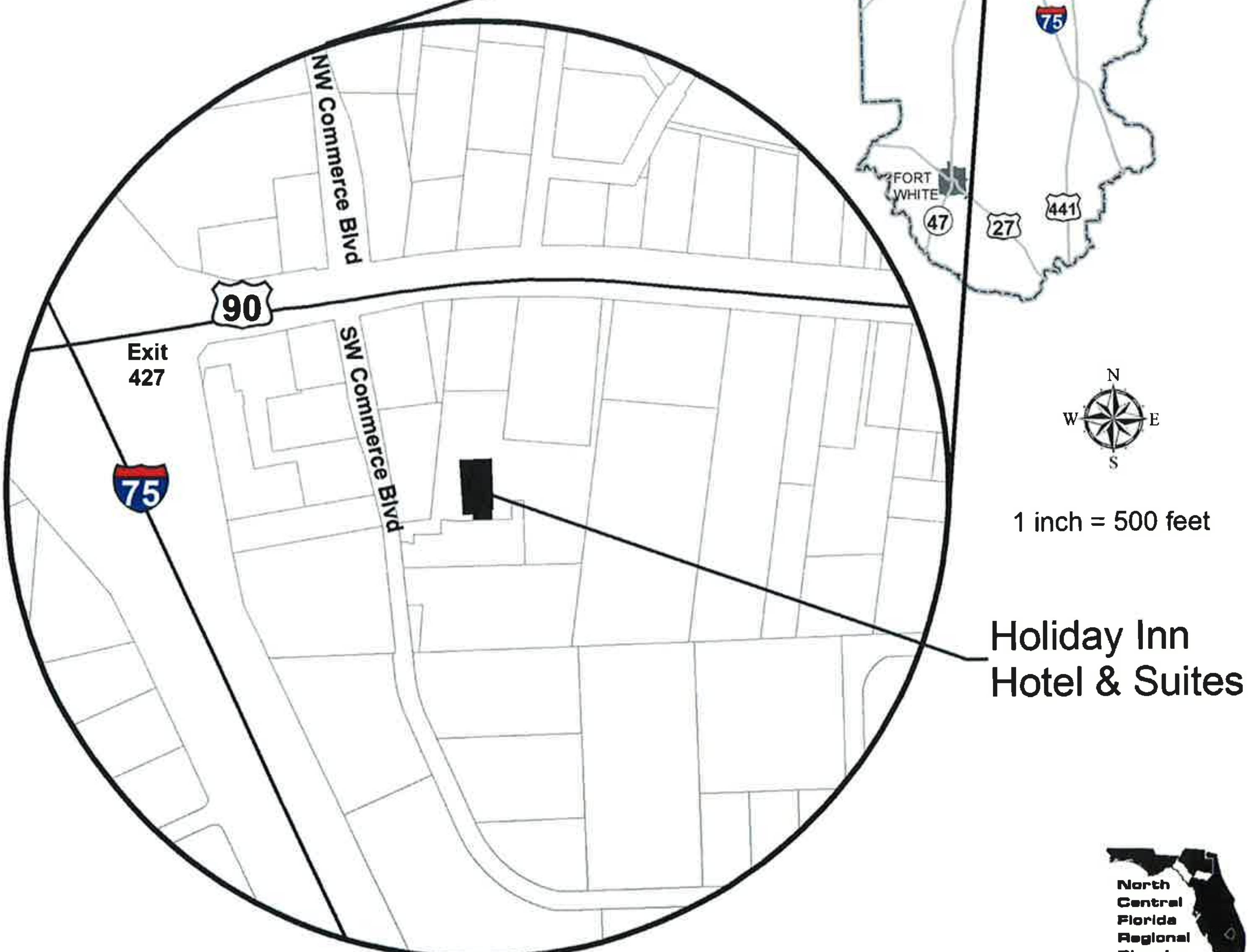
REGIONAL PLANNING COMMITTEE

There will be a meeting of the Regional Planning Committee of the North Central Florida Regional Planning Council on **March 26, 2015**. The meeting will be held at the **Holiday Inn Hotel & Suites, 213 SW Commerce Boulevard, Lake City**, beginning at **6:30 p.m.**

(Location Map on Back)

Holiday Inn Hotel & Suites
213 SW Commerce Blvd
Lake City, Florida 32025

Directions: From the intersection of Interstate 75 and U.S. Highway 90 (exit 427) in the City of Lake City turn, East onto U.S. Highway 90, travel approximately 450 feet to SW Commerce Blvd, turn right (South) onto SW Commerce Blvd, travel approximately 720 feet and the Holiday Inn Hotel & Suites is on the left.



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AGENDA

REGIONAL PLANNING COMMITTEE

Holiday Inn Hotel & Suites
Lake City, Florida

March 26, 2015
6:30 p.m.

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NORTH CENTRAL FLORIDA REGIONAL PLANNING COUNCIL

REGIONAL PLANNING COMMITTEE

MINUTES

Holiday Inn Hotel & Suites
Lake City, Florida

February 26, 2015
6:30 p.m.

MEMBERS PRESENT

Beth Burnam, Vice-Chair
Chuck Chestnut, IV
Donnie Hamlin
James Montgomery
Lorene Thomas
Robert Wilford
Stephen Witt

MEMBERS ABSENT

Randy Wells, Chair
Mike Williams

STAFF PRESENT

Steven Dopp

Vice-Chair Burnam called the meeting to order at 6:35 p.m.

I. APPROVAL OF THE JANUARY 22, 2015 MEETING MINUTES

ACTION: It was moved by Mr. Montgomery and seconded by Commissioner Wilford to approve the January 22, 2015 Committee minutes as circulated. The motion carried unanimously.

II. OVERVIEW OF STRATEGIC REGIONAL POLICY PLAN

Mr. Dopp continued his presentation from the Committee meeting held last month of an overview of the North Central Florida Strategic Regional Policy Plan. Mr. Dopp presented an overview of the Emergency Preparedness, Natural Resources of Regional Significance and Regional Transportation Elements.

III. AFFORDABLE HOUSING ELEMENT

Mr. Dopp distributed a staff evaluation of the Affordable Housing Element. The committee reviewed and discussed the staff evaluation. The Committee agreed by consensus to withhold approval of the staff evaluation until completion of the review of all elements of the regional plan.

The meeting adjourned at 7:00 p.m.

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Randy Wells, Chair

3/26/2015
Date

Chapter II
Economic Development

Adopted May 23, 1996, Amended August 28, 1997, February 27, 2003 and October 27, 2011

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Chapter II: Economic Development

A. Conditions and Trends

1. Introduction

In January 1978, the North Central Florida Regional Planning Council received its designation as the North Central Florida Economic Development District. The eleven counties in this region include: Alachua, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Madison, Suwannee, Taylor and Union counties. All of these counties, with the exception of Alachua because it is an urban county, are located within the Governor's third Rural Area of Critical Economic Concern and are actively developing a strategic plan to improve the economic environment of the rural parts of the region.

The following information identifies regional trends in population, industry clusters, infrastructure, financial resources and external forces that affect the regional economy. It utilizes Regional Economic Models, Incorporated, Policy Insight's detailed forecast for the regional economy, adjusted using the University of Florida's Bureau of Economic and Business Research population estimates for the region, unless otherwise noted.

The analysis below provides a framework for examining the regional economy and determining a strategic plan that fits the needs and strengths of the region. The region is experiencing population growth (total population estimated at 480,463 in 2005), but still lags behind the rest of Florida and the nation in terms of wages and wage growth. Poverty rates are still very high, and underemployment is evident in wage rates that in some counties are less than half the national averages. Growth is still primarily from economic migrants, but retirees are starting to move to the area as well, including those that previously lived in South Florida and are looking to find a more sparsely populated location.

The population in the region is young - 37.0 for the region compared to 39.7 for the State of Florida. But like the nation which is impacted by the baby boom generation, the population is expected to get older in the next 10 years, with a median age of 39.5 by the year 2020.

Despite the presence of the state's flagship university in Alachua County, the region's educational attainment lags behind the state as a whole. There is a disparity between the Gainesville area which has a significant capacity for high-skill, high-wage jobs and the rest of the region.

The 26 state parks in the region, a state university and several state prisons dramatically reduce the ad valorem tax base of the region. The taxable value of every north central county is considerably below the statewide average - so low that the combined taxable value of all 11 of north central Florida's counties is less than that of the average Florida county in 2004.

However, the cost of land and cost of living is still affordable in the region compared to the rest of Florida. Furthermore, the region can utilize programs such as job tax credits to incentivize prospective businesses. Approximately 3,500 acres of industrially zoned land is available for development within the region. The region is emerging as a transportation/distribution center with its good access to both Interstate Highways 10 and 75.

The region has approximately 253,000 persons employed overall in 2007, with a low unemployment rate of 2.94 percent compared to Florida and the nation. The largest employment clusters are healthcare; trade, transportation and utilities; tourism and public administration. Of the four clusters, only healthcare is considered a "basic" industry which exports outside of the region to generate wealth. And of the four, healthcare has the highest growth rates and highest wage rates. Economic diversification would be beneficial for the region. Target industries for diversification have recently been identified by Enterprise Florida's Rural Area of Critical Economic Concern for all 10 rural counties in the region, and Alachua County has completed a similar study with Lockwood Greene Consulting for its economic development planning. The target industries are as follows:

Rural County Target Industries:
- ☐ Logistics and Distribution
- ☐ Building Component Design and Manufacturing
- ☐ Aviation Services and Products
- ☐ Bio-Fuels and Energy
- ☐ Healthcare Services and Products

Urban County (Alachua) Target Industries:
- ☐ Pharmaceutical/Biotechnology
- ☐ Surgical, Medical and Dental Instruments and Supply
- ☐ Electronics, Instruments and Telecommunications Equipment

Previous Economic Development Administration Funded Projects in the Region:

There are currently no Economic Development Administration applications under review for the region. However, recent success stories include:
- ☐ The Gainesville Technology Enterprise Center business incubator
- ☐ Sid Martin Biotech Park – Tissue Manufacturing building for Regeneration Technologies

2. Strengths, Weaknesses, Problems and Opportunities

a. Population Growth in the Region

The majority of the following analysis focuses on the year 2005 as a benchmark for this report. The region's growth patterns, based on age, education, and work status are analyzed below to determine the overall strength of the workforce and availability of workers in the region.

Most of the region is sparsely populated, although this is changing. In 2005, the north central Florida Region had a population of about 480,463--an increase of almost 45,000 from 2000. The region's growth rate continues to outpace that of the nation. It should be noted that the region has a high concentration of state prisoners, accounting for 5 percent of the population total.

The population growth in the region is expected to slow in the next 10 years, according to forecasts by the University of Florida's Bureau of Economic and Business Research. The Bureau predicts that the population will increase at a rate of approximately 1.4 percent annually for the next several years, compared to an average increase of approximately 2.5 percent in from 2000 to 2005.

Natural growth accounted for about 25 percent of the population growth in the region in 2005. Thus, approximately 75 percent of the region's population growth occurred due to net migration.

i. Migration

Total net migration to the region in 2005 was an increase of 5,600 persons living in the 11-county region. The components of the net migration are domestic migrants (retirees and economic migrants), and international migration. Of the 5,600 person increase, domestic migration accounted for about 59.46 percent and international migration about 17 percent. Most domestic migration was for economic reasons, indicating that this part of Florida is not yet a hot spot for retirees.
However, retiree migrants are expected to increase dramatically in the next few years, which will impact public service provision in the region. In fact, from 2003 to 2005, the number of retirees moving to the area as a percentage of the total population growth increased from 6 percent to 12 percent of the total population growth.

Columbia County received the largest number of net domestic migrants, totaling nearly 2,256. This county alone accounted for 40 percent of north central Florida's domestic migration.

Alachua County led the region in net international migration, with 746 net international immigrants, which accounted for 80 percent of north central Florida's net international migration.

TABLE 2.1

**NORTH CENTRAL FLORIDA MIGRATION
INTERNATIONAL AND DOMESTIC MIGRATION, 2005**

County	Total Net Migration	International Migrants	Net Domestic Migration	Share of Florida's Total Net Migration (%)	Share of Florida's Net International Migration (%)
Alachua	241	746	(505)	-	-
Bradford	456	9	447	-	-
Columbia	2,256	32	2,224	-	-
Dixie	399	0	399	-	-
Gilchrist	492	3	489	-	-
Hamilton	(169)	12	(181)	-	-
Lafayette	390	18	372	-	-
Madison	(30)	12	(42)	-	-
Suwannee	961	96	865	-	-
Taylor	312	96	216	-	-
Union	291	0	291	-	-
Region	5,599	1,024	4,575	-1.6%	1.1%
Florida	349,733	87,222	262,511	100.0%	100.0%

Regional Detail in 2005	
Economic Migrants	=41.95% of all population increase
Retired Migrants	=12.21% of all population increase
International Migrants	=19.42% of all population increase within region

Source: Regional Economic Models Inc., Florida Counties Forecast, version 8.0, calibrated with population forecasts from University of Florida's Bureau of Economic and Business Research, 2006.

Summary Findings

The region is gaining population; the pace of increase is expected to slow slightly in the next five years. Migration comes primarily in the form of economic migrants from within the country. This information, combined with unemployment figures below indicates that there is a need for additional workers in the region.

The region will do well to connect workforce with these new migrants and make sure the population has skills that match jobs we hope to create. Given the low unemployment rates in the region, the slowing of the immigration in the region will create a problem for new job creation.

ii. Population By Age

North central Florida has a younger population than that of the state as a whole, due in part to the large concentration of college students in Alachua County at the University of Florida. Yet even when removing Alachua County from the regional median age, the region remains younger than the state as a whole. This could suggest there is a higher concentration of retirees in other parts of Florida, an assertion which is supported by migration data from the previous section.

In 2005, 37 percent of the region's population was younger than 25 years old, which is about 5 percent higher than Florida's share of the same group. At the same time, the elderly population (65 and over) accounted for 13 percent of north central Florida's population compared to 17 percent of the population of the state.

As the nation's population is expected to live longer, so to the state of Florida's forecasted median age is expected to rise. However, this region is still expected to remain younger than the state as a whole, as is illustrated in the table below.

TABLE 2.2

MEDIAN AGE PROJECTIONS FOR NORTH CENTRAL FLORIDA

County	Median Age			
	2005 (Estimate)	2010	2020	2030
Alachua	29.2	29.8	31.9	33.6
Bradford	37.5	37.7	38.5	40.2
Columbia	38.5	39.4	41.5	44.0
Dixie	41.4	42.6	44.1	45.7
Gilchrist	38.2	40.3	44.1	47.3
Hamilton	25.6	36.4	27.7	39.6
Lafayette	34.9	35.1	36.0	37.3
Madison	36.2	36.3	37.2	40.1
Suwannee	41.2	42.5	44.8	47.6
Taylor	38.7	39.6	41.4	43.5
Union	36.2	36.5	36.9	37.7
Region	37.1	37.8	39.5	41.5
w/o Alachua	37.8	38.7	40.2	42.3
State	39.7	40.7	42.5	44.4

Source: Population forecasts from University of Florida's Bureau of Economic and Business Research, 2006.

Summary Findings

The region is younger than the rest of the state, indicating we should have a larger workforce possible than areas of the state with high concentrations of retirees. However, that is not the case. Unemployment and growth rates indicate that there is a need for additional workforce if the region's economy is to diversify and grow.

b. Education

The University of Florida is a major, public, comprehensive, land-grant, research university with approximately 48,000 students enrolled. University of Florida faculty attracted more than $458 million in research and training grants in 2002-03. The University of Florida serves as the home of the world's largest citrus research center. Technological Strength Ranking (Massachusetts Institute of Technology Technology Review, Fall 2000) ranked the University of Florida 18th in the nation among public and private universities. NASA awarded a University of Florida-led consortium of seven universities a $15 million grant to develop a reusable launch vehicle which would replace the space shuttle.

The University of Florida Center of Excellence in Regenerative Health Biotechnology was one of three chosen by the state Board of Education to receive $10 million under the 2002 Florida Technology Development Act. Several international programs were recently funded: National Resource Center for Transnational Global Studies ($230,000), the Center for Latin American Studies (two grants totaling $1.4 million), Center for African Studies ($459,000 for the first year of a three-year grant), and the new Center for European Studies ($235,000 for the first year). The University of Florida is 13th among all universities - public and private - in the number of U.S. Patents awarded in 2000, and the University of Florida consistently ranks among the top 10 universities in licensing.

The existing system of vocational and technical training includes the Lake City Community College, North Florida Community College, Santa Fe Community College, Bradford-Union Vocational-Technical Adult Education Center, Suwannee-Hamilton Vocational-Technical Adult Education Center, Taylor County Vocational-Technical Adult Education Center and Work-force Development Boards. These facilities enhance the economic development potential of the region and represent a substantial support network for the region. From quick-response workforce training, to traditional higher educational services, economic development professionals can work with these institutions to advance the region.

A long term analysis of the region indicates that the number of persons completing a four-year college degree has doubled in the region from 1980 to 2000. Overall high school graduation rates are slightly higher in the region than the state at 73.2 percent vs. 71.9 percent. However, the national average in 2005 was a high school graduation rate estimate somewhere between 75 percent and of 85 percent (High School Graduation Rates. Center for Public Education web article, (http://www.centerforpubliceducation.org), indicating that Florida lags behind the nation in educational achievement.

Alachua County, home of the University of Florida, has a high concentration of persons with a masters degree or higher, indicating high-skilled job development is most possible in that county. Despite being the location of the state's flagship university, Alachua County has one of the lower high school graduation rates of counties in the region. This indicates that there is a likely disparity between those persons and employees associated with the University of Florida, and others within the county.

TABLE 2.3

**EDUCATIONAL ATTAINMENT BY COUNTY
PERSONS AGE 25 YEARS AND OVER**

County	High School Graduation Rates	Total Population Age 25+	Percent of Total Population, Age 25 and Over				
			Below 9th Grade	Grades 9 through 12, No Diploma	High School Graduate	Some College	Four or More Years of College
Alachua	69.6	123,524	3.7	8.2	20.3	29.1	38.7
Bradford	76.1	17,883	7.3	18.6	40.1	25.6	8.4
Columbia	74.7	36,880	6.8	18.5	334.9	28.9	10.9
Dixie	66.5	9,643	11.3	22.8	39.4	19.8	6.8
Gilchrist	85.4	8,866	7.8	19.8	36.1	26.9	9.4
Hamilton	65.7	8,758	10.5	26.6	35.1	20.5	7.3
Lafayette	79.4	4,745	12.6	19.2	40.1	20.9	7.2
Madison	63.0	12,254	10.1	22.4	34.2	23.1	10.2
Suwannee	62.0	23,492	8.6	18.2	38.8	23.9	10.5
Taylor	78.7	12,914	9.0	21.0	40.9	20.2	8.9
Union	84.1	9,363	7.5	20.1	38.9	26.1	7.5
Region	73.2	268,322	6.3	14.6	29.5	26.7	22.9
w/o Alachua	73.6	144,798	8.4	20.0	37.5	24.7	9.4
State	71.9	-	6.6	13.2	28.3	28.4	23.6

Source: 2006 Florida Statistical Abstract, Table 4.80, and Census 2000.

i. Strengths

University of Florida

The University of Florida is a major, public, comprehensive, land-grant, research university with approximately 48,000 students enrolled. University of Florida faculty attracted more than $458 million in research and training grants in 2002-03. The University of Florida serves as the home of the world's largest citrus research center. Technological Strength Ranking (Massachusetts Institute of Technology Technology Review, Fall 2000) ranked the University of Florida 18th in the nation among public and private universities $15 million for space-related research.

The National Aeronautics and Space Administration awarded a University of Florida-led consortium of seven universities a $15 million grant to develop a reusable launch vehicle which would replace the space shuttle. The University of Florida Center of Excellence in Regenerative Health Biotechnology was one of three chosen by the state Board of Education to receive $10 million under the 2002 Florida Technology Development Act. The University of Florida is 13th among all universities - public and private - in the number of U.S. Patents awarded in 2000, and the University of Florida consistently ranks among the top 10 universities in licensing.

Entrepreneurial Ability

The University of Florida offers a Master of Business Administration degree with Concentration in Entrepreneurship, undergraduate course work in entrepreneurship, graduate course work for non-business students, and a mentorship program. Also, beginning in May 2004, the Warrington College of Business is launching a new Master of Science degree in Entrepreneurship designed for working professionals. University of Florida is the first college in Florida to offer a Master of Science degree in Entrepreneurship.

Sid Martin Biotech

The University of Florida's 40,000 square foot Sid Martin Biotechnology Incubator is located in Progress Corporate Park in Alachua, 20 minutes north of the Gainesville campus. Client companies in this Best-In-Class Technology Incubation Program ranked 1st in a national survey for in-licensed incubation program and in the top 10 for average equity investment and employment growth.

Wet labs, office space, conference rooms, a pilot fermentation facility, a small animal facility plus a climate controlled greenhouse and extensive scientific and business equipment and support services combine to create an unparalleled setting for biotech startups. To date, resident Client Companies have raised $81 million in equity investment.

Additional Higher Education

The existing system of vocational and technical training includes the Lake City Community College, North Florida Community College, Santa Fe Community College, Bradford-Union Vocational-Technical Adult Education Center, Suwannee-Hamilton Vocational-Technical Adult Education Center, Taylor County Vocational-Technical Adult Education Center and Work-force Development Boards. These facilities enhance the economic development potential of the region and represent a substantial support network for the region. From quick-response workforce training, to traditional higher educational services, economic development professionals can work with these institutions to advance the region.

Gainesville Technology Enterprise Center

The two-story 30,000 square foot facility is located in the City of Gainesville Enterprise Zone and serves new and emerging technology businesses with the potential for high growth and high wage job creation. Through a comprehensive program consisting of incubation, education, networking and mentoring, the incubator management staff, together with a Board of Advisors, provides basic business assistance to tenants on an ongoing basis. The Gainesville Technology Enterprise Center offers services that add value and speed up a small company's chances for growth and success. The Gainesville Technology Enterprise Center helps new companies overcome the four risks of starting any technology-based company—business, technology, manufacturing and marketing. It does this by providing its resident startups with:

- ☐ Ongoing strategic advice and help with their business plans and strategies
- ☐ Education programs tailored to the special educational needs of tech startups
- ☐ Introductions to people and resources, including early stage venture funding sources and management candidates
- ☐ Daily interaction with other resident startups and synergistic tenants, such as serial entrepreneurs and venture capitalists
- ☐ Flexible furnished office, dry lab and assembly areas and shared services and equipment

ii. Problems

The labor force outside of the two Economic Development Centers (Gainesville/Alachua/ High Springs Area and Lake City Area) tends for the most part to be unskilled. This restricts the development of those industries which require a readily available pool of skilled workers.

Furthermore, local industries have noted the difficulty in retaining employees due to the lack of soft skills. Workforce boards in the region are currently revamping to address such needs.

iii. Summary Findings

Educational attainment for area workers should be a regional priority in terms of matching the workers with needs of area employers. Interviews with area businesses indicate that basic "soft skills" are a critical need for most regional businesses. Programs that can increase skill levels to attract more high-tech jobs will also help diversify the regional economy.

There are two grants underway to implement the innovative CHOICES program in the region. This will allow area businesses to work with high school students so that upon graduation from high school, the students can gain valuable certifications in their field of choice. Furthermore, the area community colleges are working together to address the shortage of healthcare and life science workers in our region. Any programs that can attract more workers in the healthcare and life science industries will allow for the expansion of high-skilled, high-wage jobs so critical to the success of our region.

c. Unemployment

In 2006, north central Florida had a civilian labor force of 224,382, or 2.94 percent of the state's total labor force. With a regional unemployment rate of 2.94 percent, north central Florida employed over 217,000 people in 2006, an 18.4 percent increase from 1995.

i. Labor Force And Unemployment

Of the region's eleven counties, Alachua County continued to have the largest labor force in 2005, accounting for 55 percent of the region's total labor force. Within the region, Alachua County also had the lowest unemployment rate of 2.6 percent in 2006, a decrease from 3.0 percent in 2005.

TABLE 2.4

LABOR FORCE AMOUNT AND UNEMPLOYMENT RATES BY COUNTY

County	Labor Force	Employment	Unemployment	Unemployment Rate (%)
Alachua	123,748	120,473	3,275	2.6
Bradford	12,022	11,680	342	2.8
Columbia	29,520	28,595	925	3.1
Dixie	5,774	5,580	194	3.4
Gilchrist	7,504	7,285	219	2.9
Hamilton	4,660	4,485	175	3.8
Lafayette	2,857	2,779	78	2.7
Madison	7,431	7,061	370	5.0
Suwannee	17,013	16,472	541	3.2
Taylor	8,736	8,394	342	3.9
Union	5,117	4,982	135	2.6
Region	224,382	217,786	6,596	2.94
State	8,988,616	8,692,763	295,853	3.29

Source: Florida Labor Force Statistics, released 03/08/2007 CES BENCHMARK 2006.

Summary Findings

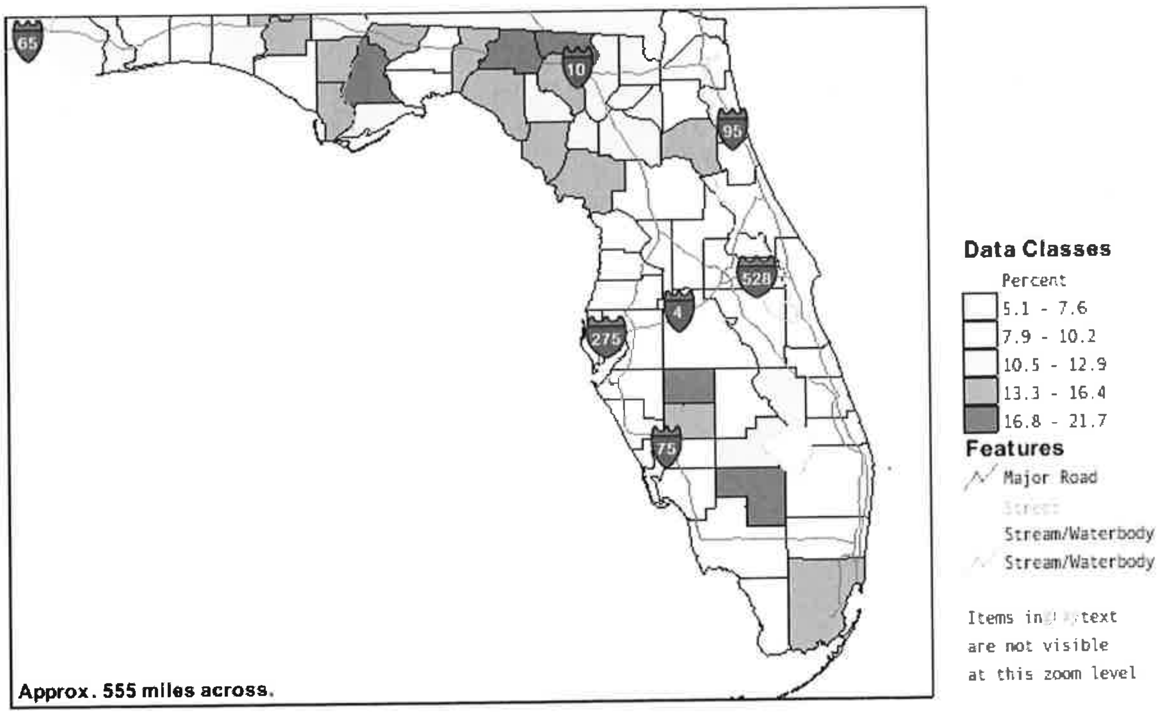
This information combined with the poverty information below indicates that there is significant underemployment in the region. This suggests the need to diversify the regional economy toward more high-skilled, high-wage jobs.

ii. Poverty

While unemployment is relatively low compared to the rest of the state, these counties represent some of the highest poverty levels in the state, suggesting there is tremendous underemployment. With heavy dependence on the service sector and government sectors, the region is in need of economic development diversification. The following map identifies the percentage of persons living below the poverty level throughout the state of Florida. Within the North Central Florida Regional Planning Council's boundaries, Madison County and Hamilton County have the highest level of poverty as a percentage of their population.

ILLUSTRATION 2.1

POVERTY LEVELS BY COUNTY IN THE STATE OF FLORIDA IN 2000



Source: U.S. Census Bureau, Census 2000 American Communities Survey.

Poverty levels have increased in Alachua, Gilchrist, and Taylor Counties since 2000, while the remaining counties saw decreases in poverty levels. The poverty threshold is defined as a family of four living on less than $18,979 annually for the nation in 2003.

TABLE 2.5

PERSONS LIVING IN POVERTY, 2003 (PERCENT)

Area	Percent of Population	Percentage Change from 2000
Alachua	13.0	1.0
Bradford	16.2	(1.1)
Columbia	15.6	(1.7)
Dixie	18.6	(2.1)
Gilchrist	14.2	0.4
Hamilton	21.8	(3.5)
Lafayette	18.9	(9.8)
Madison	18.3	(1.8)
Suwannee	16.4	(1.9)
Taylor	16.7	0.3
Union	18.0	(3.0)
Region	17.0	
State	13.0	0.5

Source: Florida Statistical Abstract 2006.

Summary Findings

See information in the previous section's findings.

iii. Workforce Participation Rates

With the nation's population aging and the associated shift in the age structure of the population towards older groups with lower workforce participation rates, the regional workforce participation rate provides an important economic indicator. The region's future labor supply growth will decline in the absence of offsetting increases in participation rates.

From 2000 to 2005, the region's labor force increased by 7.0 percent. This figure is significantly higher than the 4.0 percent increase experienced nationally during this time period. However, the region's labor force expansion was lower than the 9.0 percent statewide labor force increase.

The following table indicates workforce participation rates for the region. It indicates that the region's long range forecast for labor force participation is not increasing as rapidly as the previous five years, and that labor availability will be a constraint on economic growth.

TABLE 2.6

LABOR FORCE PARTICIPATION RATES FOR NORTH CENTRAL FLORIDA

Variable	2005	2020	Percent Change
All Races (16 - 64)	67.5%	68.6%	1.6
All Races (16 and Older)	58.9%	57.5%	(1.4)
White (16 - 64)	69.6%	70.4%	1.1
White (16 and Older)	59.7%	57.5%	(3.7)
Black (16 - 64)	60.1%	62.2%	3.5
Black (16 and Older)	54.0%	54.7%	1.3
Other (16 - 64)	64.4%	69.0%	7.1
Other (16 and Older)	61.5%	62.6%	1.8
Hispanic (16 - 64)	64.6%	66.4%	2.8
Hispanic (16 and Older)	61.4%	60.8%	(1.0)

Source: Regional Economic Models Inc., Florida Counties Forecast, version 8.0, calibrated by North Central Florida Regional Planning Council with population forecasts from University of Florida's Bureau of Economic and Business Research, 2006.

Summary Findings

The above information indicates that the region's long range forecast for labor force participation is not increasing as rapidly as the previous five years, nor as rapidly as the state as a whole. Therefore, labor availability will be a constraint on economic growth. When surveyed, area employers have placed this as a number one priority for the region's economic development success, with all other issues a distant second.

iv. Employment/Wages by Industry and Occupation

The government and agricultural sectors make up a disproportionately high percentage of the region's economy when compared to the state as whole. A full 27 percent of the regional economy was engaged in government employment (including state, local and federal employees) in 2005. The national average was approximately 16 percent of the economy in the government sector for the same period.

The table below (taken from Enterprise Florida's regional analysis) considers all non-farm employment. Education and Health Services and Trade, Transportation and Utilities industries accounted for the largest shares of north central Florida's 2005 employment (total employment numbers below vary from those used in previous graphs due to different methods of data collection in the Bureau of Labor Statistics surveys used). The average annual wage is highest in the Information industry category, at $29,867. Other high paying sectors within the region include financial activities, education and healthcare services, and professional and business services. The lowest paying industry sector is Leisure & Hospitality with an average annual wage of $12,711. All industries within the region pay a lower average wage than the state as a whole.

TABLE 2.7

EMPLOYMENT AND WAGES BY INDUSTRY, 2005

Industry	North Central Florida				Florida			
	Number of Establishments	Total Employment	Employment Share (%)	Average Annual Wage ($)	Number of Establishments	Total Employment	Employment Share (%)	Average Annual Wage ($)
Natural Resources & Mining	358	1,167	0.8%	$25,475	5,282	99,564	1.3	$22,904
Construction	1,547	10,050	7.0	29,368	68,402	585,299	7.6	38,337
Manufacturing	341	12,860	8.9	35,591	16,601	399,263	5.2	43,423
Information	197	2,615	1.8	39,867	9,629	169,489	2.2	52,738
Financial Activities	971	8,059	5.6	38,040	64,554	527,797	6.8	52,557
Professional & Business Services	1,721	12,321	8.5	33,779	115,129	1,323,771	17.1	39,426
Education & Health Services	1,168	29,760	20.6	38,091	50,175	1,422,649	18.4	38,019
Leisure & Hospitality	1,055	18,915	13.1	12,711	42,435	890,164	11.5	19,325
Unclassified	82	91	0.1	22,595	5,678	9,520	0.1	30,634
Total, All Industries	11,626	144,349	100.0	31,383	557,934	7,734,933	100.0	36,800

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

Table 2.8 presents the employment changes from 1990 to 2005 to give an historical context for the region. The industries are ordered according to how many people they employed in 2005. The Education and Health Services sector employed the most workers, so it is first, followed by Trade, Transportation, and Utilities, and the Leisure and Hospitality sector is third.

TABLE 2.8

EMPLOYMENT CHANGES IN NORTH CENTRAL FLORIDA BY INDUSTRY SECTOR, 1990 TO 2005

Sector	Employment 1990	Employment 2005	Employment Change	Percent Change 1990 - 2005
Education and Health Services	19,245	30,793	11,548	60.0
Trade, Transportation and Utilities	24,370	29,906	5,536	22.7
Leisure and Hospitality	12,438	18,478	6,040	48.6
Public Administration	9,535	13,504	3,969	41.6
Professional and Business Services	7,643	12,820	5,177	67.7
Manufacturing	10,063	12,090	2,027	20.1
Construction	5,578	9,157	3,579	64.2
Financial Activities	5,745	7,713	1,968	34.3
Other Services	3,179	4,909	1,730	54.4
Natural Resources and Mining	2,345	2,681	336	14.3
Information	2,231	2,549	318	14.3
Total	102,372	144,600	42,228	41.3

Source: U.S. Bureau of Labor Statistics, Census of Employment and Wages, for the years 1990 through 2005 and interactive Shift-Share website: www.georgiastats.uga.edu/sshare1.html

During the period 1990 to 2005, employment in the region increased by 42,230 jobs. In terms of employment growth, the most important industry was Education and Health Services (11,548 jobs). It is followed by Leisure and Hospitality (6,040 jobs), and Trade, Transportation, and Utilities (5,536 jobs).

Summary Findings

The University of Florida, the state's flagship university, is a major employer in the region, and has a major healthcare component which is gaining position in the regional employment. However, there is a shortage of healthcare workers both regionally and nationally which will impact the region's ability to grow.

Further findings indicate that a high level of the region's employment is concentrated in public administration. This suggests the need to attract basic industries which can generate money for the regional economy.

Workforce Development represents an opportunity for the region. The regional workforce boards are undergoing massive changes as they begin to focus more on high-tech and high-wage job creation throughout the state. This represents a current weakness and an opportunity to plug into the high-tech community's needs by creating appropriate curriculum in vocational and community college curriculum to accommodate future workforce needs of the existing commercial/industrial base of the economy.

d. Per Capita Income

Table 2.9 shows the components of the change in disposable personal income forecasted for the region. The first component is wage and salary disbursements by place of work. Wage and salary disbursement change as a result of the change in the number and type of workers, as well as the general pay rate changes due to changes in the supply and demand for labor. Proprietors and other labor income is the income of self-employed workers and fringe benefits. The residence adjustment shows the net effect on personal income by place of work of earnings in the local area that go to commuters into the area. Dividends, interest, and rent depend on the number of people in the area in the groups that receive this type of income, while transfer payments depend on the size and age of the dependent population. Personal income by place of residence is calculated in nominal (i.e., current) dollars. Taxes are then deducted from personal income to obtain disposable personal income as the sum of labor and proprietors' income, dividends, interest, and rent, transfer payments, and residence adjustment less personal contributions to social security.

TABLE 2.9

NORTH CENTRAL FLORIDA REGION - PERSONAL INCOME COMPONENT

Variable (Billions, Nominal $2005)	Year			
	2005	2010	2020	2030
Wage and Salary Disbursements	6.056	8.384	13.599	21.048
Proprietors and Other Labor Income	2.217	3.079	5.392	9.256
Total Labor and Proprietors Income	8.273	11.462	18.991	30.304
Less Personal Contributions to Social Security	0.939	1.324	2.282	3.752
Net Residence Adjustment	(0.136)	(0.198)	(0.375)	(0.609)
Dividends, Interest and Rent	2.006	2.791	4.365	6.534
Transfer Payments	2.399	3.404	6.363	11.313
Personal Income	11.603	16.135	27.061	43.79
Less Personal Taxes	1.133	1.635	2.686	4.264
Disposable Personal Income	10.47	14.5	24.375	39.526
Annual Expected Growth		7.7%	6.8%	6.2%

Source: Regional Economic Models Inc, Florida Counties Forecast, version 8.0, calibrated by North Central Florida Regional Planning Council with population forecasts from University of Florida's Bureau of Economic and Business Research, 2006.

Of the region's eleven counties, Alachua County accounted for the greatest share of personal income, totaling $6.2 billion, which was over 57 percent of the region's total personal income in 2004. After Alachua, Columbia County had the second largest amount of personal income of $1.27 billion. As expected, Alachua County's higher relative personal income is attributable to the presence of the University of Florida.

i. Summary Findings

Despite gains in population and job growth, the per capita income in many of the counties in the region is almost half of the national average, indicating income is not gaining at a similar pace as job growth. Alachua County led the region with the highest per capita income of $27,904 in 2004, while Hamilton and Union counties had the lowest per capita incomes in the region, of $14,823 and $14,535 respectively (Source: Florida Per Capita and Total Personal Income Report, 2002-2004, prepared by the Bureau of Economic and Business Research, University of Florida www.bebr.ufl.edu).

TABLE 2.10

PER CAPITA INCOME BY COUNTY (Nominal $)

Area	1999	2002	2003	2004
Alachua	$18,465	$25,037	$26,077	$27,904
Bradford	14,226	19,509	20,408	21,377
Columbia	14,598	19,332	19,653	20,680
Dixie	13,559	16,261	16,385	17,124
Gilchrist	13,985	20,895	21,221	22,265
Hamilton	10,562	13,255	13,865	14,823
Lafayette	13,087	14,778	14,674	15,768
Madison	12,511	14,278	17,549	18,604
Suwannee	14,678	20,015	20,481	21,732
Taylor	15,281	19,770	19,796	21,225
Union	12,333	13,297	14,254	14,535
Region	16,187	22,061	22,553	23,194
State	-	29,079	30,128	31,469
Nation	-	30,810	31,484	33,050

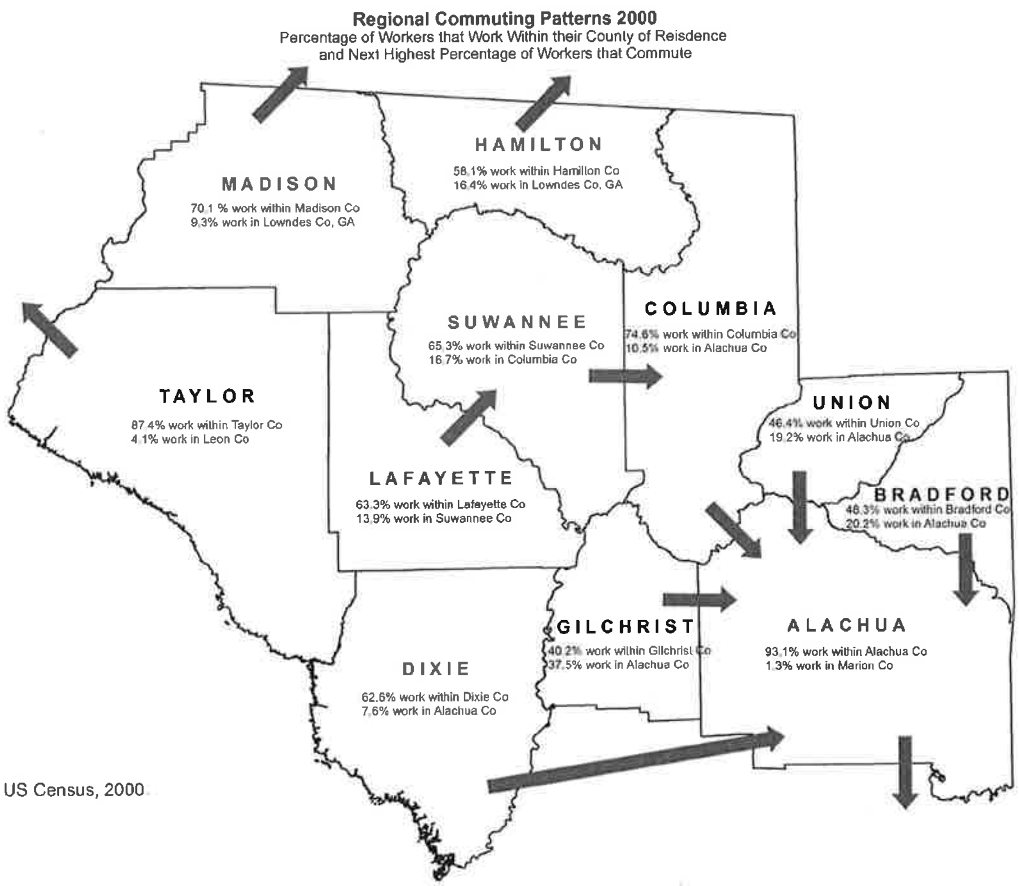
Source: Florida Per Capita Income and Total Personal Income Report 2002 - 2004. Prepared by the Bureau of Economic and Business Research, University of Florida.

e. Commuting Patterns

Given the rural nature of the area, with only one urban county within the region, the commuting patterns of the individual counties can illustrate the possible consequences of new industries locating within a county.

Over 93 percent of the residents in Alachua County work within that county. The counties immediately adjacent to Alachua County all have at least 10 percent of their residents working in Alachua County as well. Significant employment centers are found in Live Oak (Suwannee County) and Lake City (Columbia County) as well.

ILLUSTRATION 2.2
REGIONAL COMMUTING PATTERNS



Source: US Census, 2000

ii. Summary Findings

Rural travel times to work are quite extensive - indicating the dearth of job opportunities within the rural counties of the region.

The above map indicates that the region has four separate employment clusters. The first and largest cluster centers around Alachua County. The second is Columbia/Suwannee County. The third and lesser cluster is located in Southern Georgia and causes workers in the northernmost counties to travel to Lowndes County, Georgia. The fourth cluster affects only Taylor County - where 4.1 percent of its workers travel to Tallahassee for employment opportunities.

Regional projects that focus on the Alachua and Columbia/Suwannee County employment centers will affect workers in the majority of the region's counties.

f. Housing Starts

Housing information on starts and median home price are typically tracked by metropolitan areas, rather than on a county-by-county basis. Therefore, only Gainesville Metropolitan Statistical Area information is available. The following is an excerpt from a December 2006 article by Florida Home Loan (www.floridahomeloan.com):

In the third quarter 2006, the median sales price of single-family existing homes was $215,200 in the Gainesville Metropolitan Statistical Area. This is up 16 percent over 2005 and is the greatest increase in all of the state's 20 metro areas. The state prices remained flat in that time period.

For the third quarter, totals of existing condo units in Gainesville was up 14 percent, with the median sales price of $156,300 up 19 percent, both the second-highest increases in the state.

Despite local increases in those areas, single-family home sales were down 22 percent in the Gainesville metropolitan area and 34 percent statewide for the quarter.

"The past two years - 2005 and the first half of 2006 - the appreciation in Gainesville was too high," said Jean Chalmers of Coldwell Banker. "I think a lot of people flipping property bought into the market. This made the whole market hotter than what one would normally expect."

Middle income families are finding that increases have priced them out of what would typically be their next home. The increases are fueling the local third quarter 2006 Gainesville housing market boom.

The following table summarizes median home prices throughout the United States, and the nearest Metropolitan Statistical Areas to the region:

TABLE 2.11

HOME PRICES IN FIRST QUARTER 2007

Area	Median Home Price (000s)	Percent Increase (1 year)
Northeast	$268.9	(2.5)
Midwest	154.6	(2.8)
South	177.8	(0.6)
West	336.2	(2.5)
Nation	212.3	(1.8)
Some Florida Metropolitan Statistical Areas		
Gainesville	216.4	(3.0)
Jacksonville	197.6	(1.0)
Ocala	167.9	(5.1)

Source: National Association of Realtors, 2007. www.realtors.org.

g. Natural Areas

The region consists of 6,813 square miles, all of which is classified by the Council as a natural resource of regional significance.[1]

A number of tracts of publicly-held lands are found in north central Florida. The regional plan identifies 316,823 acres of regionally significant public lands, representing 6.7 percent of the region. So much north central Florida land is in public ownership that some north central Florida county governments oppose additional public land acquisitions due to the resultant decline in the local tax base.

Publicly-owned lands recognized by the regional plan as natural resources of regional significance include Austin Cary Memorial Forest, Big Shoals Tract, Big Gum Swamp National Wilderness Area, Big Bend Coastal Tracts, Devils Millhopper State Geologic Site, Ichetucknee Springs State Park, Lower Suwannee River National Wildlife Refuge, Okefenokee National Wildlife Refuge, Osceola National Forest, O'Leno State Park, Paynes Prairie State Preserve, Peacock Springs State Recreation Area, River Rise State Preserve, San Felasco Hammock State Preserve, St. Marks National Wildlife Refuge, Steven Foster State Folk Cultural Center, Suwannee River State Park, water management district lands including Lochloosa Forest, various tracts along the Suwannee River, as well as other holdings.
Natural resources of regional significance are natural resources or systems of interrelated natural resources,

[1]Includes the Floridan Aquifer, a natural resource of regional significance which underlies the entire region.

which due to their function, size, rarity, or endangerment, provide benefits of regional significance to the natural or human environment.[2] They consist of both coastal and inland wetlands, rivers and their associated floodplains, large forested areas, lakes, springs, the Floridan Aquifer, and land areas with the potential to adversely affect the water quality of the aquifer (stream-to-sink watersheds and high recharge areas). Listed species are also recognized as natural resources of regional significance.[3]

Regionally significant natural resources play important roles in the region's economy and quality of life. Drinking water for most residents is drawn from the Floridan Aquifer. The Suwannee-Santa Fe river system and fresh water wetlands serve a valuable role in regulating surface water runoff and flooding. The salt marsh provides a valuable breeding ground for many varieties of commercial seafood. Commercial forest lands play an important role in the regional economy, while public lands provide valuable resource-based recreation for north central Florida residents. Both private and public lands provide important habitats for the survival of native plant and animal species. Nearly all identified natural resources of regional significance play, or can play, an important role in the region's budding ecotourism industry. For further information and detail on the natural resources in the area, please see the Natural Resources of Regional Significance Element.

i. Potential Problems: South Florida Need for Water

Today in south Florida, competition for water is intense and divided between a large, rapidly growing population along the coast and agriculture north and south of Lake Okeechobee, on the one hand, and the remaining natural ecosystem mostly within State and Federal parks, reserves, sanctuaries, and preserves, on the other. Satisfying the water-resource demands of these competing interests is a complicated and difficult task. The quantity of water required for urban and agricultural uses may, at times, exceed supply. There have been some suggestions that North Florida's waterways be utilized to supplement the water needs of South Florida. Therefore, local water management districts are beginning to plan for minimum flow levels and other means to protect the North Florida ecosystem for future generations in the face of these water pressures.

ii. Summary Findings

North central Florida is home to the largest concentration of first magnitude freshwater springs in the entire world. With over 20 state parks and an abundance of public lands dedicated to maintaining the wild state of the area, water and environmental quality in the region has been historically high. This is a strength in terms of pursuing eco-tourism for the region, the abundance of water can also attract water-based

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[2]North central Florida regionally significant facilities and resources, as defined in Rule 27E.005, Florida Administrative Code, consist of Regionally Significant Emergency Preparedness Facilities identified in Table 3.4, Natural Resources of Regional Significance identified in Table 4.1, Regionally Significant Transportation Facilities identified in Table 5.9, and Regionally Significant Facilities and Resources, identified in Section VI.

[3]Listed species means an animal species designated as Endangered, Threatened, or Species of Special Concern in Chapter 68A-27.003-68A-27.005, Florida Administrative Code; a plant species designated as Endangered, Threatened, or Commercially Exploited as designated in Chapter 5B-40, Florida Administrative Code or an animal or plant species designated as Endangered or Threatened in Title 50 Code of Federal Regulations Part 17.

manufacturing facilities, such as water bottling plants. A careful balance must be maintained to ensure continued environmental quality and minimum flow levels in the region's waterways and natural areas.

The area, with its abundance of open space and surface water resources, exhibits potential for recreational development. The mineral resources throughout the region also represented economic potential as the world demand for fertilizer increases. However, environmental considerations cause local governments to scrutinize carefully any potential development which might impair the environment despite economic benefits.

h. Infrastructure

The Florida Department of Transportation has identified its Strategic Intermodal System for Florida which includes Interstate Highway 75, Interstate Highway 10, U.S. Highway 19, U.S. Highway 301, State Road 26, State Road 100 and the Gainesville Regional Airport within the region. There are also freight rail corridors and one greyhound bus terminal in Gainesville that are part of the Strategic Intermodal System.

i. Enterprise Zones

There are four enterprise zones within the region: An urban enterprise zone in Alachua County (Gainesville's downtown and East Gainesville zones), and rural enterprise zones in Hamilton, Madison and Taylor Counties. The zones were re-authorized through 2010. The Florida Enterprise Zone Program offers various tax incentives to businesses located within the designated enterprise zones. In addition, local governments may also offer their own incentives. There is not an opportunity to add additional state Enterprise Zones at this time.

j. Existing Industrial Zoned Land

Alachua County's economic development organization has noted that there is a lack of available commercial and industrial zoned land within the county. The existing industrial park near the airport is fully occupied, the regional business incubator is also fully occupied. They have made plans to purchase land for additional business park development by the year 2012 (estimate).

There are eight industrial parks with land available for development at this time in the region. The largest industrially zoned parcel available is 900 acres in Alachua County.

TABLE 2.12

INDUSTRIAL ZONED LAND BY COUNTY, 2005

County	Total Industrial Acreage	Largest Available Contiguous Parcel	Industrial Park?	Acreage in Park
Alachua	2,131	900	Yes	1,390
Bradford	N/A	N/A	Yes	300
Columbia	1,500	300	Yes	600
Dixie	600	242	Yes	160
Gilchrist	N/A	N/A	No	0
Hamilton	50	35	Yes	110
Lafayette	N/A	60	No	0
Madison	1,700	N/A	Yes	690
Suwannee	480	97	Yes	132
Taylor	N/A	27	Yes	27
Union	N/A	N/A	N/A	N/A
Region	6,461	900	8	3,509

N/A = not available.

Source: Enterprise Florida County Profiles, 2006.

In many instances, areas lack adequate public utilities and the basic framework for economic development. Recent examples include Lake City's lack of wastewater treatment which has hampered the growth of their industrial areas, and Gainesville Regional Utility is currently looking to expand its electrical generation capacity

There are 33 incorporated municipalities in the region. Twelve of the 33 do not have a municipal wastewater treatment facility.

k. Gainesville Regional Utilities

Gainesville Regional Utilities' generating capacity is currently 611 megawatts, with a peak demand to date of 465 megawatts. For planning purposes, and in cooperation with the other Florida utilities that are connected to a statewide grid, it maintains a 15 percent reserve margin represented by the difference between capacity and demand, divided by demand. Based on 88,992 total customers during 2006, the demand per customer at time of peak (maximum hour) was approximately 5.2 kilowatts per customer. On an average hourly basis, per customer demand was 2.7 kilowatts. Over the course of the next 20 years, Gainesville's electrical system demand is expected to increase, and its generation fleet will experience retirements, such that Gainesville Regional Utilities expects to fall below the 15 percent reserve margin threshold by 2018. The five-year snapshots show the projected available generation capacity, summer peak demand, and system reserve margin (without generation additions).

TABLE 2.13

GAINESVILLE REGIONAL UTILITIES LONG-RANGE DEMAND ESTIMATES

Year	Available Capacity (MW)	Summer Demand (MW)	Reserve Margin
2010	612	492	25%
2020	547	518	6%
2035	464	546	(15%)

MW = megawatts

Source: Gainesville Regional Utilities, 2007.

As indicated above, the main utility in the region is expected to be unable to meet demand in the region sometime shortly after the year 2020. Gainesville is expected to construct a new power plant in the next few years and has recently voted to focus on biofuels as a means for power creation.

Tables 2.14 and 2.15 identify permitted levels of water and wastewater use for select cities in the region. The permitted amounts are based upon peak daily uses. For many of the smaller municipalities in the region, the lack of wastewater treatment is an impediment to growth. Many of the larger municipalities have peak loads that would preclude large industrial users from moving to a location within the region.

TABLE 2.14

WATER CAPACITY FOR SELECT NORTH CENTRAL FLORIDA MUNICIPALITIES

Municipality	Permitted Water Plant Capacity (Peak Gallons per Day)	Water Plant Average Daily Use (Gallons per Day)	Reserve Capacity	Residual Capacity	Projected Average Daily Water Use in Year 2030
Fanning Springs	630,400	106,973	60,774	462,653	192,807
Gainesville	54,000,000	26,000,000	2,000,000	26,000,000	N/A
Hawthorne	1,728,000	204,546	-	1,523,454	N/A
Jasper	1,400,000	636,000	-	764,000	N/A
Jennings	200,000	102,480	-	97,520	185,367
Lee	864,000	60,743	-	803,257	83,131
Live Oak	2,500,000	1,184,701	4,028	1,311,271	1,156,417
Madison	1,800,000	1,170,000	25,985	604,015	-
Mayo	1,728,000	217,868	3,630	1,506,502	250,891
Perry	3,940,000	1,850,000	-	2,090,000	-
Starke	2,400,000	911,000	-	-	1,376,205
Trenton	1,800,000	222,794	3,485	1,573,811	368,184

N/A = Not Available

Source: North Central Florida Regional Planning reporting from local government services contracts.

TABLE 2.15

WASTEWATER CAPACITY FOR SELECT NORTH CENTRAL FLORIDA MUNICIPALITIES

Municipality	Permitted Wastewater Plant Capacity (Peak Gallons per Day)	Wastewater Plant Average Daily Use (Gallons per Day)	Reserve Capacity	Residual Capacity	Projected Average Daily Wastewater Use in Year 2030
Fanning Springs	-	-	-	-	None
Gainesville	22,400,000	15,300,000	1,530,000	5,570,000	N/A
Hawthorne	150,000	118,000	18,006	13,994	N/A
Jasper	1,200,000	686,000	-	514,000	158,567
Jennings	-	112,560	-	87,440	-
Lake City	-	-	-	-	None
Lee	-	-	-	-	N/A
Live Oak	1,250,000	770,997	3,089	475,914	N/A
Madison	1,370,000	845,000	18,608	506,392	126,673
Mayo	150,000	110,000	2,783	37,217	N/A
Perry	1,250,000	764,000	-	486,000	N/A
Starke	1,650,000	885,000	-	-	1,336,928
Trenton	200,000	90,160	2,638	107,202	116,187

N/A = Not Available

Source: North Central Florida Regional Planning reporting from local government services contracts.

Increased infrastructure, including water, wastewater, and road capacity enhancement has been identified as one of the key areas of focus for the Rural Area of Critical Economic Concern that encompasses most of the region. Many fixed costs for capital facilities needed to be incurred to provide the needed infrastructure. Feasibility studies or market analyses are needed to help prevent uninformed investment decisions and to determine the appropriate level of public works necessary to stimulating economic growth.

Directly associated with the lack of existing infrastructure was the lack of local financial resources with which to finance the cost of infrastructure improvements. Local communities did not have the financial capacity to purchase sites suitable for industrial development or to extend the necessary utilities to those sites. Nor did they have the monetary resources to finance community facilities such as recreation facilities or cultural centers. These types of facilities, while not absolutely necessary to enhance economic development, make a community more attractive to private investors.

I. Financial Resources

On average, the state's counties generate 31.4 percent of their revenue from taxes and impact fees. None of the counties in the region (with the exception of Alachua and Gilchrist Counties) have impact fees at this time. Most rural counties in Florida do not rely on impact fees because of their relatively low growth rates. However, many heavily rely on Special Assessments to provide needed infrastructure and other services. The following table identifies the debt service per capita for each county in the region.

TABLE 2.16

COUNTY FINANCE: EXPENDITURE BY FUNCTION OF COUNTY GOVERNMENT, FISCAL YEAR 2003-2004

	(Thousands of Dollars)							(Dollars)
County	Total	General Government	Public Safety	Physical & Economic	Transportation	Human Services, Culture & Recreation	Debt Service, Other Uses and Interfund Transfers	Debt Service per Capita
Alachua	273,005	40,314	76,726	19,588	8,739	10,105	117,532	488.2
Bradford	27,828	4,639	5,406	1,960	2,161	870	12,791	454.9
Columbia	67,299	6,638	15,197	8,346	11,649	3,453	21,925	356.7
Dixie	20,083	2,379	5,899	1,812	2,036	716	7,240	470.8
Gilchrist	16,415	3,503	3,274	555	3,452	501	5,128	316.1
Hamilton	20,789	2,482	5,346	2,003	2,791	1,039	7,127	497.9
Lafayette	8,702	1,292	1,867	1,004	783	684	3,072	385.4
Madison	23,331	2,115	5,827	1,941	3,448	1,295	8,704	441.9
Suwannee	40,156	5,226	8,947	4,234	7,402	3,671	10,675	279.6
Taylor	31,577	3,577	6,568	2,264	5,607	1,390	12,171	571.1
Union	11,044	1,452	2,659	1,017	1,083	473	4,360	289.8
Florida	34,800,662	4,424,668	6,544,232	5,558,528	4,006,260	4,289,212	9,977,762	556.9

Source: Florida Statistical Abstract, 2006.

The same information as above can be represented as a percentage of the total expenditure by county to compare the portion of each county budget going toward different components of service:

TABLE 2.17

COUNTY FINANCE: EXPENDITURE BY FUNCTION OF COUNTY GOVERNMENT, PERCENT OF TOTAL EXPENDITURES FISCAL YEAR 2003-2004

County	Total	General Government	Public Safety	Physical and Economic	Transportation	Human Services, Culture and Recreation	Debt Service, Other Uses, and Interfund Transfers
Alachua	100.0%	14.8%	28.1%	7.2%	3.2%	3.7%	43.1%
Bradford	100.0	16.7	19.4	7.0	7.8	3.1	46.0
Columbia	100.0	9.9	22.6	12.4	17.3	5.3	32.6
Dixie	100.0	11.8	29.4	9.0	10.1	3.6	36.1
Gilchrist	100.0	21.3	19.9	3.4	21.0	3.1	31.2
Hamilton	100.0	11.9	25.7	9.6	13.4	5.0	34.3
Lafayette	100.0	14.8	21.5	11.5	9.0	7.9	35.3
Madison	100.0	9.1	25.0	8.3	14.8	5.6	37.3
Suwannee	100.0	13.0	22.3	10.5	18.4	9.1	26.6
Taylor	100.0	11.3	20.8	7.2	17.8	4.4	38.5
Union	100.0	13.1	24.1	9.2	9.8	4.3	39.5
Region	100.0	13.4	23.5	8.7	13.0	5.0	36.4
Florida	100.0	12.7	18.8	16.0	11.5	12.3	28.7

Source: Florida Statistical Abstract, 2006.

The region's counties tend to spend more of their budgets on public safety and less on physical, economic, and human service improvements, as a percentage of their total budget than the state average. Furthermore, the average county's debt service as a percentage of total expenditure is higher in the region than the state's average of 28.7 percent of total expenditures.

Most of the counties in the region are near the 10 mil cap for government millage rates. The following table details the millage components for the counties in the region.

TABLE 2.18

MILLAGE RATES BY COUNTY, 2005

	County Government		School Board			
County	Operating Millage	Debt Service Millage	Operating Millage	Debt Service Millage	Other Millage	Total Millage
Alachua	8.9887	0.2500	8.1150	0.9190	1.5920	19.8647
Bradford	9.5000	0.0000	8.1740	0.0000	0.0000	17.6740
Columbia	8.7260	0.0000	7.9550	0.0000	2.3794	19.0604
Dixie	10.0000	0.0000	8.1840	0.0000	0.4914	18.6754
Gilchrist	10.0000	0.0000	8.0190	0.0000	0.4914	18.5104
Hamilton	10.0000	0.0000	8.0740	0.0000	0.4914	18.5654
Lafayette	10.0000	0.0000	7.8610	0.0000	0.4914	18.3524
Madison	10.0000	0.0000	6.3900	0.0000	0.4914	16.8814
Suwannee	9.7000	0.0000	8.0320	0.0000	0.4914	18.2234
Taylor	8.0760	0.0000	7.6590	0.0000	0.4914	16.2264
Union	10.0000	0.0000	8.3350	0.0000	0.4914	18.8264

Source: Florida Statistical Abstract 2006, Table 23.93.

i. Assessed Value

The 26 state parks in the region, the state university and several state prisons dramatically reduce the ad valorem tax base of the region. The taxable value of every north central county is considerably below the statewide average—so low that the combined taxable value of all 11 of north central Florida's counties is less than that of the average Florida county in 2004. Thus, there is tremendous need for support from organizations outside of the region that have the capacity to help foster technology and economic stability.

Another constraint to development is the abundance of land in the region which is either in timber production or flood-prone. Likewise, the need to preserve prime agricultural land for agricultural production presents another prime consideration and constraint to economic expansion. The region lacks many raw materials which would enhance its potential for attracting heavy industry. However, the region has potential for supporting light industry such as textile, medical, technical, and electronic industries, and other industries with labor-intensive production techniques.

In addition, the local governments in the region needed technical assistance in pursuing economic development at both the regional and local levels. Often local government staffs were small, and the time and expertise to pursue both economic and community development opportunities was not available. Thus, communities often did not pursue potential sources of funding available for infrastructure and other necessary improvements.

m. Summary Findings

i. Strengths

A factor enhancing the development potential of the region related to its undeveloped nature is the relative low cost of acquiring land. This, coupled with availability of transportation and lower labor costs, enhances the competitive position of the region and raises its standing in the relocation and expansion decisions of industrial firms.

ii. Weaknesses/Problems

The combination of a high percentage of publicly owned land, millage rate caps, recent property tax rollbacks, and other fiscal restraints indicate that the region's governments are having difficulty providing basic services to the region. When analyzed in conjunction with the lack of adequate water and wastewater, it seems that local government units will not soon have the resources to improve their water and water systems on their own.

3. External Forces

a. Natural Disasters

In early 2007, the region experienced the worst drought in several decades. As a result, several wildfires interrupted business in the employment centers in Columbia and Hamilton County.

Long term drought could impact flow levels in one of the region's key resources - fresh water springs and rivers.

In addition, the hurricane season in 2004 negatively impacted tourism in that year and 2005. Should another active hurricane season arise, the region could again be faced with reduced tourism, a key component of the state's economy.

b. Insurance Crisis

Due in part to active hurricane seasons in the last few years, and due in part to state policies, Florida is facing sharp increases in the cost to insure property, and some providers are refusing to renew policies in the state. The Legislature has addressed this issue in a special session by enacting legislation that provides for the state to assume a higher level of risk in its catastrophic reinsurance fund. However, it is not clear if this change will lower the cost of insuring the average Floridian.

c. Property Tax Reform

In the spring 2007 legislative session, the decision to dramatically reduce property taxes in the state was discussed. Action in a special section decreased tax revenues by 3 to 9 percent for individual counties and cities. The final impact of this reform is not yet known for local governments. Further tax cuts are possible through a statewide constitutional referendum which could also reduce public school funding. If this comes to pass, the impact on rural counties will be dramatic.

4. Identifying Clusters

Clusters are groups of inter-related industries that drive wealth creation in a region, primarily through export of goods and services. The use of clusters as a descriptive tool for regional economic relationships provides a richer, more meaningful representation of local industry drivers and regional dynamics than do traditional methods. Some technical factors that are important in determining which industries clusters are important to a region include, total employment, export-orientation and wealth generation.

TABLE 2.19

REGIONAL EMPLOYMENT BY INDUSTRY SECTOR

North Central Florida Employment by Industrial Sector	2007 (in Thousands)	Percent of Total Labor Force
Public Admin (State, Local and Federal Government)	69.212	28.1
Health Care, Social Asst	34.931	14.2
Retail Trade	27.793	11.3
Accom, Food Services and Art, Entertainment, Recreation	22.611	9.2
Other Services (excluding Government)	12.962	5.3
Manufacturing	11.822	4.8
Construction	11.133	4.5
Professional, Technical Services	10.537	4.3
Administration, Waste Services	8.567	3.5
Real Estate, Rental, Leasing	8.488	3.4
Finance, Insurance	7.886	3.2
Wholesale Trade	4.551	1.8
Transportation, Warehousing	4.449	1.8
Educational Services	4.182	1.7
Information	3.138	1.3
Forestry, Fishing, Other	2.975	1.2
Utilities	0.62	0.3
Mining	0.242	0.1
Management of Companies, Enterprises	0.233	0.1
Total	246.332	100.0

Source: Regional Economic Models Inc, Florida Counties Forecast, version 8.0, calibrated with population forecasts from University of Florida's Bureau of Economic and Business Research, 2006.

The top four industry sectors, which employ almost 65 percent of the total employees in the region, are:

- ☐ Government, or public administration
- ☐ Healthcare
- ☐ Retail Trade
- ☐ Hospitality industries (Accommodation, Food Services, Art, Entertainment & Recreation)

Table 2.19 indicates the top employers in the region. In 2007, over 28 percent of the workforce in the region is employed in the public administration sector. That is an increase from previous years. There is a high concentration of state prisons in the region, which accounts for some of the public administration employment. Furthermore, the largest population center in the region is in Alachua County, where employees of the University of Florida are classified as state employees.

a. Summary Findings

The area's economy exhibits strength in the healthcare, retail, and hospitality industries. Retail and hospitality industries are typically lower paying than healthcare. Therefore, efforts to increase competitive advantage in healthcare and life science, and efforts to attract high-skilled, high-wage jobs to the region will be very beneficial.

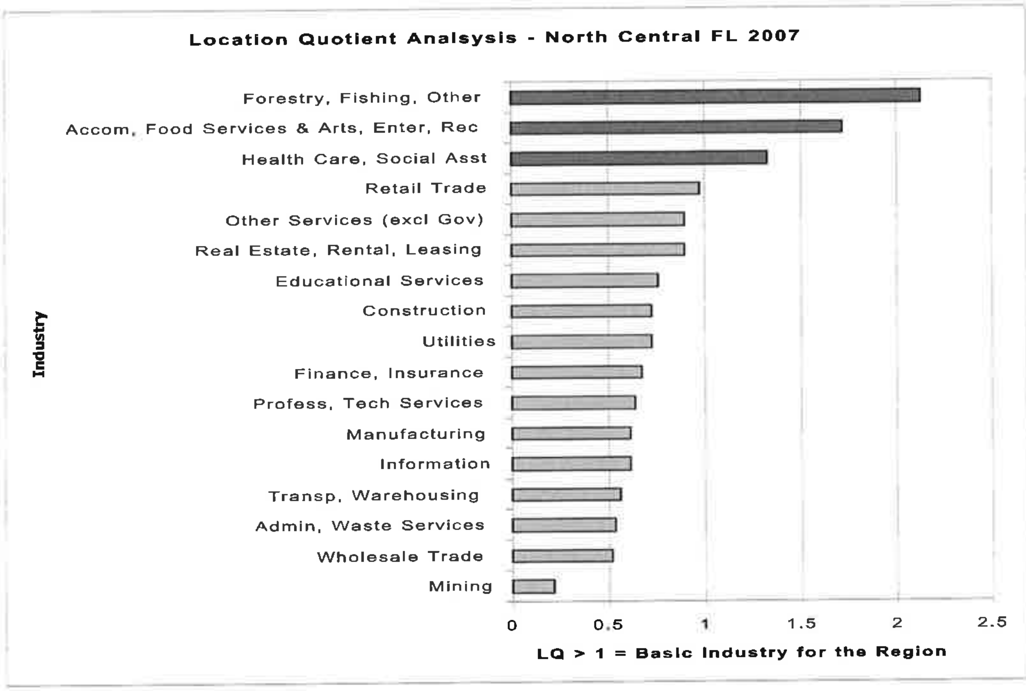
b. Location Quotient Analysis

Ideally, when attempting to identify regional clusters one would like to know which industries export goods and services out of the region and bring wealth back into it. The standard approach is to use a "location quotient" which identifies the industries that employ more workers in the region than the national average for that same industry. The theory is that by employing more workers than the national average the industry is producing more goods and services than the region alone can consume; thus, the industries export the excess product out of the region. The following illustration identifies the 23 main industry categories in the North American Industry Classification System. It then examines the industries within the region as compared to industry presence in the nation as a whole.

A location quotient greater than one indicates that a particular industry exports its products outside of the region, and is a "basic" industry for that region.

ILLUSTRATION 2.3

LOCATION QUOTIENT ANALYSIS, 2007



Source: Regional Economic Models Inc., Florida Counties Forecast, version 8.0, calibrated with population forecasts from University of Florida's Bureau of Economic and Business Research, 2006.

Only three of the 23 industry sectors are considered basic for the region:

- Forestry and Fishing;
- Accommodation and Arts, Entertainment and Recreation (Tourism Industry loosely defined); and
- Healthcare.

i. Summary Findings

Diversifying the regional economy to attract more basic industries is critical to improving the regional product.

The next section will analyze those industry clusters in detail.

c. Characteristics of Primary Clusters in the Region

i. Forestry

Forestry has long been an important part of the economy in north central Florida. A large portion of the region's vacant/agricultural land is used in silviculture production. Most of the product from this land is exported to other regions, as indicated by a location quotient of 2.13. However, this industry employs relatively few persons in the region.

Key Characteristics of Forestry and Fishing Industry Employment in the Region from Regional Economic Models, Incorporated, Baseline Data

2007 Employment	2,975 employees
Average Wages Paid	$27,127
Percent of Regional Workforce Employed in Cluster	1.2%
Location Quotient	2.12

In economics there is a technique called shift-share analysis. Its purpose is to take the change in employment for an area and decompose it into the three sources that caused the change.

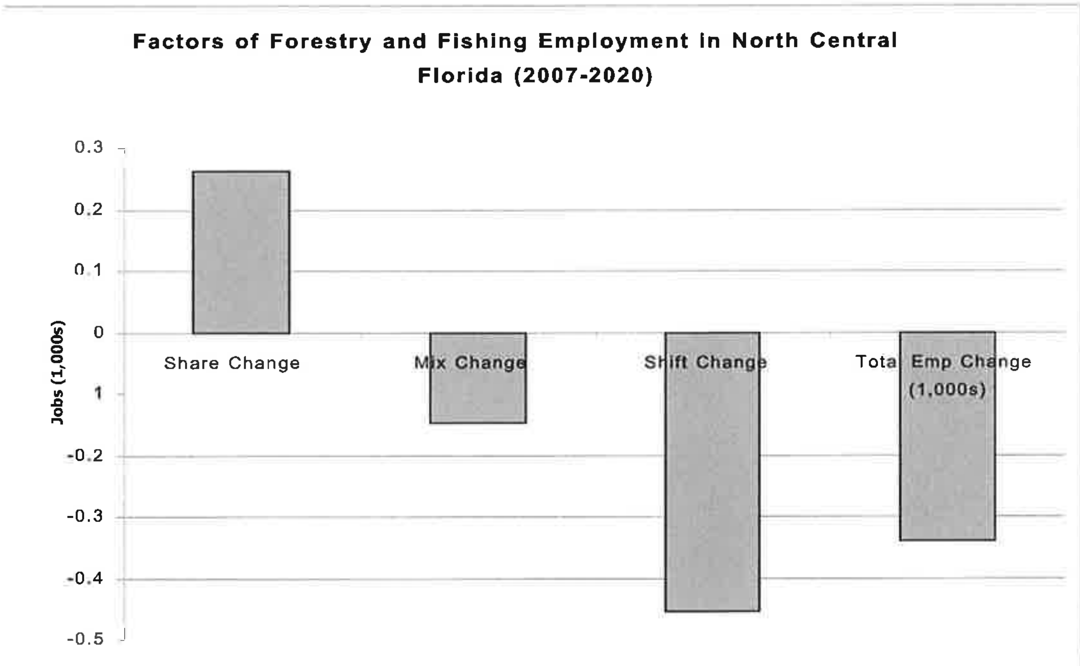
The shift share analysis of the industry in the illustration below identifies three types of employment change:

Shift Share Analysis Components

- ☐ Share Change = changes due to general national growth
- ☐ Mix Change = changes caused by industry on the national level
- ☐ Shift Change = changes caused by regional competitiveness

ILLUSTRATION 2.4

SHIFT-SHARE ANALYSIS
FORESTRY AND FISHING INDUSTRY



Source: Regional Economic Models Inc., Florida Counties Forecast, version 8.0, calibrated with population forecasts from University of Florida's Bureau of Economic and Business Research, 2006.

Thus, the industry is expected to decline nationally, but its regional competitive advantage is also expected to decline, leading to a net decline of approximately 340 jobs over the next 15 years.

ii. Tourism Industry

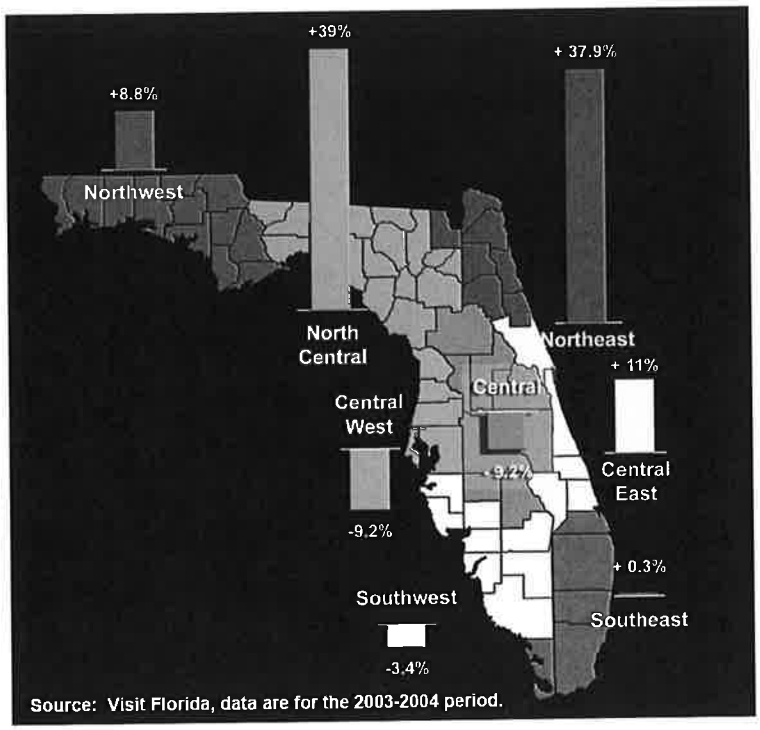
Key Characteristics from Regional Economic Models, Incorporated, Baseline Data

2007 Employment	22,611 employees
2007 Average Wages Paid	$12,797 to $18,050
Percent of Regional Workforce Employed in Cluster	9.2%
National Growth Rate (10-year from 2005)	+22%
Location Quotient	1.7

North central Florida has underutilized Florida's reputation as a tourism destination. Only 2.9 percent of all visitors to Florida come to this part of Florida for their vacations. However, visitors to the region are increasing, as trends toward "off the beaten path" locales strengthen. From 2003 to 2004, visitation to north central Florida increased by 29 percent, the highest increase in any subregion of the state of Florida. People are looking to visit small towns and uncrowded natural places, such as those that make up much of our region. Thus, this industry has excellent potential for increasing in the region in coming years.

ILLUSTRATION 2.5

TOURISM INCREASES BY REGION IN FLORIDA, 2003 TO 2004



A study completed for Enterprise Florida by Cambridge Systematics indicated that the U.S. growth rate for this industry for the next ten years is estimated at 22 percent. However, the average annual wage in the sector is the lowest of all the industry sectors at somewhere between $12,797 and $18,050, depending on how one classifies the industry.

iii. Retail Trade

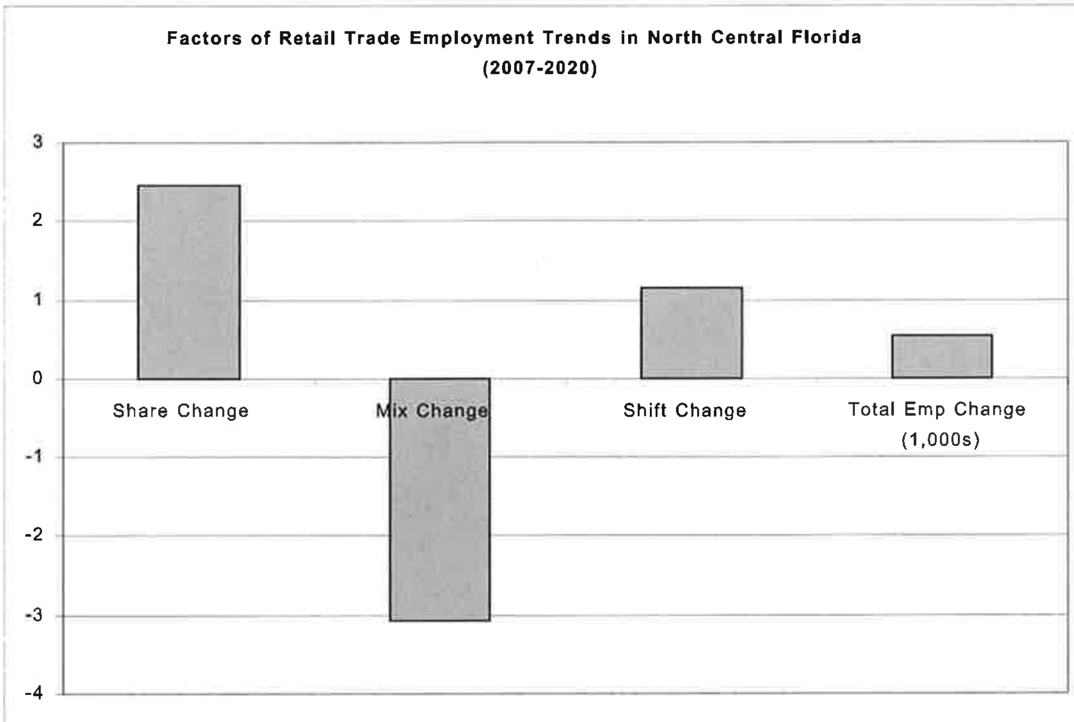
Key Characteristics of the Industry
Regional Economic Models, Inc.,
Baseline Data

2007 Employment	27,793 employees
2007 Average Wages Paid	$20,682 in North Central Florida
Percent of Regional Workforce Employed in Cluster	11.3%

Retail trade is often categorized with other types of trade and utilities in Labor Statistics reports. Trends indicate this industry will decline nationwide as a percentage of total employment, but that the region will improve in its competitiveness, thus the industry decline nationally will be offset by an increase in employment due to regional competitiveness. Overall, 544 new jobs are expected in this industry in north central Florida by the year 2020. The factors of growth: share change representing the overall national economy, mix change representing industry changes nationally, and shift change for regional competitiveness are summarized in the following illustration.

ILLUSTRATION 2.6

SHIFT-SHARE ANALYSIS
RETAIL TRADE IN NORTH CENTRAL FLORIDA, 2007-2020



Source: Regional Economic Models Inc., Florida Counties Forecast, version 8.0, calibrated with population forecasts from University of Florida's Bureau of Economic and Business Research, 2006.

iv. Healthcare and Social Assistance Services

Incorporated, baseline data

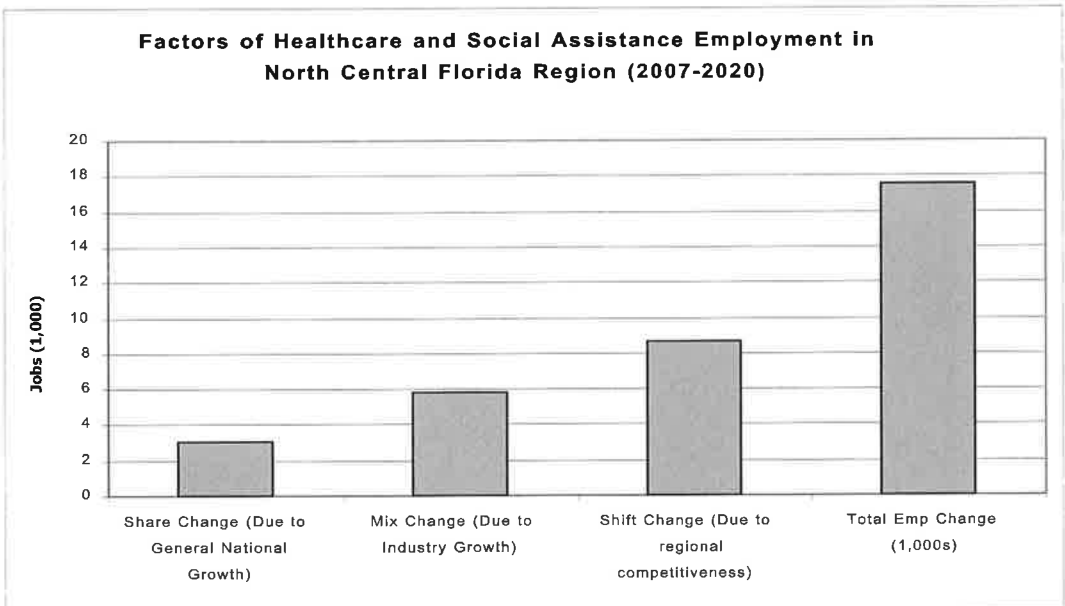
2007 Employment	34,931 employees
2007 Average Wages Paid	\$33,736 in N Central Florida
Percent of Regional Workforce Employed in Cluster	14.2%

This industry grew by 60 percent from 1990 to 2005 within the region. National trends indicate that healthcare will continue to grow as a portion of total US employment. With Shands planning to open a new 192 bed cancer hospital by Fall 2009, and the current health-related industries at the Sid Martin bio-tech park, it is likely that this region will continue to be strong in healthcare services into the future.

Components of growth in the region's healthcare industry employment are detailed on the following chart. It suggests that in addition to national and industry trends, the region will gain competitive advantage in the healthcare industry and that approximately 17,500 new jobs will be created in the region's healthcare and social assistance sector by 2020.

ILLUSTRATION 2.7

SHIFT-SHARE ANALYSIS
HEALTHCARE & SOCIAL ASSISTANCE SERVICES, 2007 TO 2020



Key Characteristics of the Healthcare Industry from Regional Economic Models.

Source: Regional Economic Models Inc., Florida Counties Forecast, version 8.0, calibrated with population forecasts from University of Florida's Bureau of Economic and Business Research, 2006.

d. Emerging Clusters or Targeted Clusters: Shift-Share Analysis

As previously discussed, a technique called shift-share analysis is used to analyze the change in employment for an area. Shift-share analysis deconstructs employment into the three sources that caused the change.

The historical shift share analysis of the industry in the table below, combined with the shift share analysis of key segments of the economy gives an overview of the general trends for the industries that make up our regional economy. As a reminder, shift-share analysis identifies three types of employment change:

Shift Share Analysis Components:

- ☐ Share Change = changes due to general national growth
- ☐ Mix Change = changes caused by industry on the national level

☐ Shift Change = changes caused by regional competitiveness

A shift-share analysis identifies trends within the region's industry clusters and determines which industries are expected to grow over time. First, the historical shift share for the region will be examined.

TABLE 2.20

SUMMARY SHIFT-SHARE ANALYSIS FOR NORTH CENTRAL FLORIDA 1990-2005

Sector	National Growth Component		Industrial Mix Component		Competitive Mix Component	
	Percent	Jobs	Percent	Jobs	Percent	Jobs
Manufacturing	20.9	2,103	(41.1)	(471)	40.7	4,094
Education & Health Services	20.9	4,023	20.9	4,031	18.2	3,495
Public Administration	20.9	1,993	(8.7)	(831)	29.5	2,810
Trade, Transportation & Utilities	20.9	5,094	(7.7)	(1,872)	9.5	2,314
Leisure & Hospitality	20.9	2,600	15.4	1,917	12.2	1,523
Construction	20.9	1,166	17.6	981	25.7	1,432
Financial Activities	20.9	1,201	(3.2)	(184)	16.6	952
Other Services	20.9	664	3.7	117	29.8	949
Professional & Business Services	20.9	1,598	39.4	3,012	7.4	567
Natural Resources & Mining	20.9	490	(22.5)	(524)	15.8	370
Information	20.9	466	(10.6)	(236)	3.9	88
Total	-	21,398	-	5,940	-	18,594

Source: U.S. Bureau of Labor Statistics, Census of Employment and Wages, for the years 1990 through 2005 and interactive Shift-Share website: www.georgiastats.uga.edu/sshare1.html.

i. Discussion of Shift-Share Results for 1990 to 2005

National Growth Component

The first source of change is the growth or contraction in the United States economy. During the time period 1990 to 2005, the nation's employment grew by 20.9 percent (i.e., America's employment in 1990 and 2005 was 108.6 million and 131.3 million, respectively. The growth rate is therefore (131.3 - 108.6) / 108.6) * 100 = 20.9 percent).

This growth rate is listed in Table 2.20 as the national growth component. The effect of the national growth component is felt most acutely during the peaks and valleys of the business cycle, i.e. during recessions and boom times. Local businesses are very aware of how the general business climate affects them. As reported in Table 2.20, this area's biggest employer from 1990 to 2005, the Education and Health Services sector, had the highest national growth component. The 20.9 percent national growth component led to this sector's employment growing by 4,023 jobs (i.e., 20.9 percent times the sector's base employment, 19,245, equals 4,023 jobs). Overall, the national growth component was responsible for a total of 21,398 jobs in this 11-county area. An understandable goal of some local leaders is to make their economy more 'recession proof'. Economies with more employment in government, military and education will experience less fluctuation because those sectors are not directly related to the business cycle. Also, economic sectors that are experiencing more growth will provide larger employment gains to a local economy.

Industrial Mix Component

Insight into these growing sectors is provided by the second aspect that shift-share analysis considers, the industrial mix component. This component is found by calculating the percent growth rate for an economic sector at the national level and subtracting from it the national growth component. Thus, the industrial mix component measures how well an industry has grown, net of effects from the business cycle. Table 2.20 lists these components for each sector. The highest industrial mix component was 39.4 percent in the Professional and Business Services sector, and it was responsible for 3,012 jobs (i.e., 39.4 percent times this sector's base employment, 7,643, equals 3,012 jobs). If this area's employment were concentrated in these sectors with higher industrial mix components, then the area could expect more employment growth. After adding up across all sectors, it appears that the industrial mix component was responsible for increasing the area's employment by 2,240 jobs. Thus, the area has a concentration of employment in industries that are increasing nation-wide, in terms of employment. The majority of these jobs can be attributed to growth in the Education and Health Services sector.

Shift-share analysis does not explain why an economic sector has slower or faster growth. Rather, the local development official must use knowledge about the business conditions facing particular industries to understand this. For example, in some rural counties the manufacturing sector was once dominated by apparel firms. The availability of low-priced imported clothing in the 1990's has meant that many apparel firms have gone out of business. Many counties therefore have a negative industrial mix component for manufacturing.

Competitive Share

The third and final component of shift-share analysis is called the competitive share. It is the remaining employment change that is left over after accounting for the national and industrial mix components. If a sector's competitive share is positive, then the sector has a local advantage in promoting employment growth. For example, the Education and Health Services sector employment grew by 60 percent. Of this 60 percent, 20.9 percent was due to the national growth component and 20.9 percent was due to the industrial mix. This leaves a remainder of 18.2 percent that is attributable to the local conditions facing this economic sector. For the Education and Health Services sector, the competitive share translated into 3,495 jobs (i.e., 18.2 percent times the base employment level of 19,245 equals 3,495 jobs). The top three sectors in competitive share were Manufacturing, Education and Health Services, and the Public Administration sector. Across all sectors, the competitive share component totals to 18,594 jobs.

A positive competitive share component would indicate that your area has a productive advantage. This advantage could be due to local firms having superior technology, management, or market access, or the local labor force having higher productivity and/or lower wages. A negative competitive share component could be caused by local shortcomings in all these areas. By examining the competitive share components for each industry, the development official can easily identify which local industries have a positive competitive share component. This also indicates which industries have competitive advantages over other counties and regions. Local officials can then devise strategies to improve local conditions faced by particular industries selected for focus. These strategies may include specialized training programs for workers and management, improved access to input and product markets through transportation and telecommunications, or arranged financial alternatives for new machinery and equipment.

Quantitative calculation of economic concentrations has its limitations and may sometimes fail to identify certain types of clusters, like small and emerging clusters. Emerging cluster industries, such as environmental technology, may have a relatively lower current economic concentration then compared to the nation but have the potential to become more economically significant in the future. These are younger industries in their early stages of development. Emerging clusters may also be branches from older, more established industries that have chosen to pursue a new direction. They may be more sensitive to market conditions and policy decisions due to their smaller size and lack of entrenchment in the regional economy.

Emerging clusters are generally identified through analyzing growth and employment trends, interviews with local business people or by some source of local industry knowledge. Thus, both Gainesville and the rural counties in the region have hired consultants to identify emerging industries within the region that they may wish to target. The target industry analysis identifies statewide trends (such as Florida's recent effort to become a bio-technology center with several Scripps partnerships), and statewide goals of becoming an aerospace center, through work with National Aeronautics and Space Administration at Cape Canaveral. Furthermore, regional trends of a new concentration of transportation warehouses were analyzed using interviews with area economic development officials and using information on recent industry moves to the region.

Enterprise Florida recently worked with north central Florida through a series of workshops to identify target industries for the creation of catalyst projects that hope to increase those industries. They analyzed industry trends, statewide initiatives, and goals of economic development groups to identify five clusters of focus:

The target industries are as follows:

Urban County (Alachua) Target Industries as provided by Lockwood Greene Consulting:

- ☐ Pharmaceutical/Biotechnology
- ☐ Surgical, Medical and Dental Instruments and Supply

- ☐ Electronics, Instruments and Telecommunications Equipment

Rural County Target Industries as provided by Fairfield Index and Cambridge Systematics:

- ☐ Logistics and Distribution
- ☐ Building Component Design and Manufacturing
  Aviation Services and Products
- ☐ Bio-Fuels and Energy
- ☐ Healthcare Services and Products

ILLUSTRATION 2.8

TARGET INDUSTRIES IDENTIFIED THROUGH ENTERPRISE FLORIDA

Preliminary Target Industries
North Central Region

Industry	Gaining Position	National Growth	Filling Gap	Regional Metro Target	EFI Target	Stakeholders
Logistics and Distribution	●	●	●	●		●
Building Component Design and Manufacturing	●		●			●
Aviation Services and Products	●		●	●	●	●
Bio-Fuels and Energy	●	●				●
Healthcare Services and Products		●	●	●	●	●

Source: Enterprise Florida and Fairfield Index, 2006.

The industries in the above graph and for Alachua County are either growing, have been targeted as a high-skill, high-wage area of desired growth, or fill needs in economic diversification for the region.

Summary Findings

The region has a competitive advantage in healthcare provision and this acts as a basic industry bringing in outside dollars to benefit the local economy. It has been identified as a key industry for the region. It is then reasonable to focus on this as a priority for the region.

5. Regionally Significant Economic Facilities and Resources

a. Enterprise Florida/Rural Economic Development Initiative Catalyst Sites

Among Enterprise Florida's eight priorities to support economic diversification, The Roadmap to Florida's Future: 2004-09 Strategic Plan for Economic Development calls for implementation of an economic stimulus strategy for three Rural Areas of Critical Economic Concern. Since their designation, the three Rural Areas of Critical Economic Concern (North Central, Northwest, and South Central Florida) have identified a significant number of overlapping agendas, including broadband, infrastructure and education, and produced a seven-point plan to support improvement in overall competitiveness. This plan included the need to conduct industry research, build regional teamwork around a catalytic economic opportunity, and go-to-market with a regional site.

On May 7, 2007, two regional sites were chosen to focus on prospects in the building/construction and distribution center market segments. Those were:

a. Columbia County - Phillips site 504 acres
b. Suwannee County – Harrell Site 500 acres

Both projects will need infrastructure improvements to be developed.

b. The Original Florida Tourism Task Force

The North Central Florida Regional Planning Council's Economic Development staff assists local governments through sustainable economic development organization called The Original Florida Tourism Task Force. The group brings together the region and conducts marketing for 14 counties to increase tourism, but also entrepreneurial capacity development for the hospitality industry.

- Marketing and familiarization trips through the region generate over $800,000 in advertising equivalency for the region annually.
- Return on Investments is > $225 generated for each $1 of dues to Original Florida (on average)
- Visitor Numbers (Source: VISIT FLORIDA) 2003: 1,663,200 visitors
  2004: 2,311,300 visitors
  2005: 2,006,160 visitors

This represents approximately $180,505,000 injected into regional economy in 2005 (using average spending per party per day in our region).

Adopted May 23, 1996, Amended August 28, 1997, February 27, 2003 and October 27, 2011

c. Healthcare And Life Science Professionals

There is a shortage of healthcare and life science industry workers in the region, and nationwide. Santa Fe Community College, Lake City Community College, and possibly North Florida Community College are proposing a project that deals with workforce development, but may qualify for a U.S. Economic Development Administration planning grant to increase the number of healthcare and life science professionals in the region. This represents well over 1,000 jobs needed in the region.

The U.S. Economic Development Administration indicates that planning grants are possible for plans/curriculum creation, and for a "marketing" strategy for getting young people into health professions. A construction grant could also be given for a project that helps build a facility which will cater to educating people in this field.

d. Regional Business Incubators and Research Parks

An integral ingredient in successful regional economic development is small business start-ups. Given the high failure rate of new businesses (80 percent collapse within five years), both the entrepreneur and the region have a vested interest in any initiative that has the potential to improve the success rate of new entrepreneurial initiatives.

The region wishes to support the expansion of business incubators and research parks which support high-tech business startups. Specific projects within the region include:

1. The Gainesville Technology Enterprise Center is a business incubator in Gainesville is full and is in need of expanded facilities and services. The center is currently fully occupied and has a waiting list. The facility could be expanded onsite, but could also provide a hub and spoke system of incubators throughout the region, building on the experience of the incubator manager and sharing best practices with new incubators.

2. Plan East Gainesville would like to acquire a building that would provide permanent office space for various non-profit organizations; meeting space for others (state of the art conference rooms for a fee), office/development space for emerging companies (i.e. a general small business incubator and temporary or permanent office space for non-incubated entities), and technology space (staffed computer center) offering revenue producing opportunities for all involved while serving as a center of commerce and pride for the community and emerging company and non-profit participants.

3. The Sid Martin Biotech park Wet labs, office space, conference rooms, a pilot fermentation facility, a small animal facility plus a climate controlled greenhouse and extensive scientific and business equipment and support services combine to create an unparalleled setting for biotech startups. To date, resident Client Companies have raised $81 million in equity investment.

4. The TechCom and Advanced Food Nutrition research park proposed near Newberry Florida. This facility will utilize patents from a small biotech firm in Gainesville, to create a value-added agricultural business park with an estimated initial investment of $140 million and over 150 jobs.

e. Infrastructure Improvements Near I-75 and I-10 Interchanges to Improve Economic Development

Interstate Highway 75 is the gateway into Florida, with over 6.4 million vehicles traveling into Florida using Interstate Highway 75 each year. This Corridor is a portal to the communities of north central Florida, and the interchanges from the state line through Gainesville are critical to the prosperity of the region. Furthermore, the Florida Department of Transportation has identified its Strategic Intermodal System for Florida which includes Interstate Highway 75 and Interstate Highway 10.

Therefore, specific economic development projects which increase infrastructure and the ability to attract businesses to this area are desirable for the Comprehensive Economic Development Strategy Committee. Specific possible projects include:

1. State Road 6 and Interstate Highway 75 interchange in Hamilton County. Businesses have considered this location, but utilities need to be extended to the area to open it up for a series of both retail and industrial improvements. Therefore, the business locating here will leverage significant investment for the whole region.

2. Ellisville site is 294 acres off Interstate Highway 75 at U.S. Highway 41 intersection ¼ mile in Columbia County. This is a good location for logistics and distribution related industries (a Rural Area of Critical Economic Concern target industry). Columbia County officials note there is interest in the site.

f. Long Range Priorities

In addition to the priority projects listed above, the region will support the following long range projects.

i. Regional Energy Facilities

As the state grows, there will be a continued need for energy. A proposed energy facility in Taylor County would provide critical energy for growing communities in north and central Florida, and would provide approximately 180 high paying jobs. Additionally, a recent $20 million bio-fuel plant development grant through the University of Florida is another example of a potential energy generating facility that may be located within the region. Bio-fuels and energy industry classifications are target industries identified by Enterprise Florida and by the Rural Area of Critical Economic Concern.

ii. Regional Airport Facilities

The Gainesville Regional Airport is part of the state's Strategic Intermodal System and is a key component to economic development in the region. Aviation services and products is also a target industry of the Rural Area of Critical Economic Concern. Thus, rural airparks and the Gainesville Regional Airport's business park expansion in the next few years are long range priorities for the region.

g. Other Projects

Other projects which were considered for inclusion in the North Central Florida Comprehensive Economic Development Strategy include the following.

i. Dixie County

The Florida State Prison system is planning to expand, adding an estimated 50 jobs. A parcel of land adjacent to an existing prison could be used to expand the prison and house another business which would create approximately 35 jobs if water, sewer and a paved road could be extended to the area. A total 85 jobs is projected to be created.

ii. Alachua County Fairgrounds

The City and County are working together to convert existing fairgrounds to a business park, and to create new fairgrounds and a new 50 acre industrial park. This project is located next to Gainesville Regional Airport and will dramatically improve the airport industrial land availability. The existing industrial park is full and business and industrial land within the county is scarce. Timeline: The fairgrounds must be constructed first. No timeline estimate for the business and industrial parks yet.

iii. Bradford County Keystone Heights Airport

Needs an access road to create a lease based air park with approximately 20 potential parcels.

iv. Union County Airport

Need road improvements and runway paving near small municipal airports. A company currently located in the county looking to expand and is considering this location. The company is a metal building manufacturer looking to create 200 jobs.

v. Hamilton County State Road 6 and Interstate Highway 75 Interchange

Businesses have considered this location, but utilities need to be extended to the area..

vi. Hamilton County Genoa Site

A home builder may locate in this area and provide 75 to 150 jobs. Water and sewer need to be extended.

vii. Columbia County Ellisville Site

The Ellisville site consists of 294 acres located at the intersection of Interstate Highway 75 at U.S. Highway 41 in southern Columbia County. The site is a good location for logistics- and distribution-related companies (a Rural Area of Critical Economic Concern target industry). Interest in the site has been expressed by private companies.

viii. Columbia County Wastewater Treatment Facility

Several employers have noted that they would like to expand in Columbia County but cannot do so due to limitations in wastewater capacity.

B. Problems, Needs and Opportunities

The Council identifies the following economic development problems, needs and opportunities.

1. Utilizing its location and natural resources and current labor force, the area possesses many opportunities for tourism development. Currently this area receives a smaller share of tourism than many similar sized land areas in the rest of the state. Thus there is significant opportunity for expansion of its tourism market share.

2. The region is predominantly rural with a relatively small population base. There is a lack of a skilled labor force in the area which may be needed to attract a more diverse set of industries, and may also preclude entrepreneurial development.

3. The region and the state have an established growth management process which directs growth and development to urban areas that have the capacity to accommodate new development.

4. There are few locations in the region that have excess capacity. In addition, not all the urban areas in the region have municipal water and sewer systems.

6. Counties are increasingly developing regional efforts to provide public services, such a system of state-of-the-art sub-regional landfills that have recently become established throughout the District.

7. The District is currently leading an effort to promote a regional tourism program which focuses on multi-county attraction zones.

8. Furthermore, regional and sub-regional alliances are being fostered by the Comprehensive Economic Development Strategies Strategy Committee process, the North Florida Economic Development Partnership program, as well as regional transportation organizations.

9. Cooperative efforts are often difficult because of parochialism on the part of local citizens and officials; however, as more regional "successes" are achieved, this aspect is easier to overcome.

10. The North Florida Economic Development Partnership has named leadership capacity improvement as one of its primary objectives in its early years of formation. Constraint: Rural economic developers and tourism officials often lack the resources and time to attend educational offerings.

11. The Florida Economic Development Council's educational conferences and similar programs provide technical assistance for area economic developers. VISIT FLORIDA and Florida Association of Convention and Visitor's Bureau and similar organizations provide educational opportunities for tourism professionals.

12. The North Central Florida Regional Planning Council will focus on the following four opportunities.

A. Staffing and Executive Committee participation for the Economic Development Partnership as it coordinates efforts to utilize the Governor's Third Rural Area of Critical Economic Concern. Regarding the Partnership, Planning Council staff will utilize the newly formulated North Florida Economic Development Partnership as the primary economic development partnership for the region. Planning Council staff will be part of the Executive Committee for the new Partnership, based upon the organizational structure of the Rural Area of Critical Concern group, and will continue to provide technical support. Planning Council staff has been integral in the Ad Hoc Committee designed to create an organizational structure, its work plan and regional activities.

B. Staffing The Original Florida Tourism Task Force. The Original Florida Tourism Task Force will focus on reprinting its main collateral piece, the Natural North Florida brochure, as well as continue its highly successful Hidden Treasures campaign. Educational workshops on Agritourism and business development supporting The Suwannee River Wilderness Trail are anticipated.

C. Identifying projects for financial assistance by applying for at least two Economic Development Administration grants throughout the region in the coming year. The Council will continue to identify projects for funding by other agencies as well. The Council will also complete its projects funded through the United States Department of Agriculture, Community Development Block Grant and Florida Recreation Development Assistance Program grants. Finally, the North Central Florida Regional Planning Council will continue to work with the communities in the region to assist them with their projects. Staff will participate on task forces to address specific issues, gather information for grant applications, and help build support for projects as necessary.

Planning Council staff will work with the regional consortium of healthcare and life science providers to advance a planning grant application to increase the availability of healthcare workers in the region.

D. Providing technical assistance. The Planning Council will continue outreach to area local government units. Staff will alert local officials of our ability to provide Regional Economic Models, Incorporated, economic impact analysis, and will continue to respond to general assistance questions, including demographic and other planning related assistance.

Technical assistance will be provided through information based on the needs of local governments. A new form of technical assistance in the coming year is the provision of economic impact modeling using Regional Economic Models, Incorporated, software to help local decision-makers make more informed choices in terms of local incentives, impact fees, or other means of regulating their attempts to attract and retain businesses.

C. Regional Goals and Policies

REGIONAL GOAL 2.1. Diversify the economy of the region and thereby increase the level of employment opportunities and decrease out-migration of productive members of the labor force. This includes non-traditional job sectors and high-skill, high-wage job sectors.

Regional Indicators

1. In 2003, there were 1,641,000 visitors to the region.

2. In 2003, there were 20,363 professional and high-technical jobs in the region.

Policy 2.1.1. Support the efforts of programs such as the Economic Development Administration, University Center and the Florida Information Technology Centers of Excellence, CHOICES academies in high schools, community college banner programs and similar programs.

Policy 2.1.2. Encourage completion of necessary market analyses and feasibility studies to attract compatible development in an area to prevent expensive misuse of capital and resources. Provide technical assistance through the use of Regional Economic Models, Incorporated, as a tool in economic development decision-making.

Policy 2.1.3. Identify area workforce needs by conducting a business survey of the region every other year.

Policy 2.1.4. Promote business incubator programs throughout the region which will create more skilled workforce, opportunities for self employment or entrepreneurship, and higher paying jobs from these grass-roots initiatives and facilitate the expansion of at least one incubator, and add one incubator to the region.

REGIONAL GOAL 2.2. Encourage and guide infrastructure development into those areas where needed, and where development would not place undue strain on those aspects of the region that are already overloaded, and increase by three the number of communities in the region with centralized sanitary sewer systems.

Regional Indicators

1. As of 2008, twelve of the 33 north central Florida incorporated municipalities do not have a municipal wastewater treatment facility.

2. As of 2008, three of the 44 north central Florida local government comprehensive plans contain an Economic Development Element.

Policy 2.2.1. Growth management laws and rural sprawl reduction must be considered in prioritization of infrastructure projects.

Policy 2.2.2. Provide technical assistance for government units desiring the addition of economic development elements to their comprehensive plans.

REGIONAL GOAL 2.3. Encourage regional or multi-county cooperation wherever possible to avoid unnecessary and expensive duplication and to lower cost for each party involved.

Regional Indicator

As of 2008, the Planning Council provides staff support to one multi-county economic development organization.

Policy 2.3.1. Continue to assist in the establishment regional and sub-regional tourist attractions and regional economic development initiatives.

REGIONAL GOAL 2.4. Support educational and leadership capacity building programs for economic development and tourism industry within the region and graduate 25 persons from economic development leadership academy annually.

Regional Indicator

In 2008, 19 persons graduated from the economic development leadership academy.

Policy 2.4.1. Continue to support regional educational and capacity building workshops for economic development and hospitality industries through sponsoring at least one educational/entrepreneurial workshop annually.

North Central Florida Comprehensive Economic Development Strategy

2013-2017

September 2012




North Central Florida Regional Planning Council


North Central Florida Comprehensive Economic Development Strategy

2013-2017

September 2012

Grant Period: January 1, 2011 through December 31, 2013
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Executive Summary

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Executive Summary

The North Central Florida Regional Planning Council has served as the North Central Florida Economic Development District since January 1978, when the Council received its district designation from the U.S. Economic Development Administration. Counties that are members of the Council and the municipalities located within those counties are included in the North Central Florida Economic Development District, and are designated by the U.S. Economic Development Administration as redevelopment areas and are eligible for financial assistance from the U.S. Economic Development Administration.

"The Regional Planning Council is a federally designated Economic Development District."

The primary function of the North Central Florida Economic Development District is to create and update the Comprehensive Economic Development Strategy for the region. The Comprehensive Economic Development Strategy provides the framework by which economic development projects in the region qualify for grant funding from the U.S. Economic Development Administration. The Strategy is developed by the Strategy Committee which is comprised of a broad range of regional economic development, business, civic, education and workforce development professionals.

"The Strategy is based upon the Florida Chamber Foundation's Six Pillars of Florida's Future Economy."

The following report provides a description of current economic and demographic conditions of the region, an analysis of regional strengths and weaknesses and an analysis of regional industry clusters. The report also lists the economic development goals and objectives as well as the Priority Project Areas developed by the Strategy Committee. The report includes a plan of action that outlines the activities necessary to implement the goals and objectives of the Strategy.

The Strategy uses the Florida Chamber Foundation's Six Pillars of Florida's Future Economy as the organizing framework. The Six Pillars are: Talent Supply & Education; Innovation & Economic Development; Infrastructure & Growth Leadership; Business Climate & Competitiveness; Civic & Governance Systems; and Quality of Life & Quality Places.

Regional Stakeholder Meeting, Gainesville

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Comprehensive Economic Development Strategy

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Comprehensive Economic Development Strategy

A. Background

"The Strategy is a continuing economic development planning process."

The Comprehensive Economic Development Strategy is a continuing regional economic development planning process with broad based community participation designed to help guide the economic growth of the region. The purpose of the Strategy is to create an economic environment that fosters job creation, a more diversified economy, and improves the quality of life for the residents of the North Central Florida Economic Development District. The Strategy provides a mechanism for coordinating the efforts of local governments, private industry, organizations and individuals concerned with economic development.

Santa Fe College Perry Center for Emerging Technologies, Alachua

The Strategy is developed by a committee appointed by the North Central Florida Regional Planning Council. The members of the Strategy Committee represent a broad spectrum of interests, including: local economic development organizations; private industry; local governments; education and workforce; civic organizations; minority and special interest groups. The Strategy Committee meets to discuss progress on elements of the Strategy, and to make recommendations for amendments to the Strategy based on changes to the economic environment.

"The Strategy is developed by a broad spectrum of public and private interests."

In addition to providing a cooperative framework for economic development coordination and planning, the Strategy also provides:

- An analysis of economic and community development problems and opportunities that incorporate relevant material from other government sponsored or supported plans;

- A background and history of the economic development situation of the region, with a discussion of the economy, including geography, population, labor force, resources and the environment;

- A discussion of community participation in the planning efforts;

- A section setting forth goals and objectives for taking advantage of the opportunities and solving the economic development problems of the area serviced;

- A plan of action, including suggested projects to implement objectives and goals set forth in the strategy; and

- Performance measures that will be used to evaluate whether and to what extent goals and objectives have been or are being met.

"The Strategy is required to qualify for federal economic development funds."

The development and maintenance of the Strategy is required to qualify for U.S. Economic Development Administration assistance under its public works, economic adjustment and planning programs, and is a prerequisite for designation by the U.S. Economic Development Administration as an Economic Development District. Since 1978, the North Central Florida Regional Planning Council has served as the designated planning agency for the North Central Florida Economic Development District.

The North Central Florida Regional Planning Council region includes 44 county and municipal governments. The 11 counties include Alachua, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Madison, Suwannee, Taylor and Union. The 33 municipalities include (by County): Alachua - Alachua, Archer, Gainesville, Hawthorne, High Springs, LaCrosse, Micanopy, Newberry and Waldo; Bradford - Brooker, Hampton, Lawtey and Starke; Columbia

North Central Florida Counties and Municipalities

- Fort White and Lake City; Dixie - Cross City and Horseshoe Beach; Gilchrist - Bell, Fanning Springs and Trenton; Hamilton - Jasper, White Springs and Jennings; Lafayette - Mayo; Madison - Greenville, Lee and Madison; Suwannee - Live Oak and Branford; Taylor - Perry; Union - Lake Butler, Raiford and Worthington Springs.

Ichetucknee Springs, Columbia County

The North Central Florida Economic Development District has a total of 7,246 square miles and is bordered on the west by the Gulf of Mexico and on the north by the Florida-Georgia state line. With the exception of Alachua County, the region is primarily rural, with a 2010 U.S. Census population of just under 500,000. Over one-half of the population, 264,000, resides in the Gainesville Metropolitan Statistical Area, which consists of Alachua and Gilchrist Counties. Gainesville is home to the University of Florida, a land grant university, which is the primary economic driver of the region. Unlike many other regions of the state, north central Florida does not have beaches or theme parks, though it has a growing nature and eco-tourism base that takes advantage of the abundant presence of springs and rivers that flow through the region.

The regional climate is very temperate with summer high temperatures averaging in the low to mid nineties and winter low temperatures averaging in the low to mid forties. Record high temperatures have reached the low hundreds. Hard freezes are infrequent, with record low temperatures in the low teens. Average annual rainfall is approximately 50 inches. Hurricanes are a major source of concern throughout Florida. The remote coastal communities of the region are at the greatest risk for storm surge related flooding. However, the primary hurricane threats to most of the population centers of the region are from wind damage and rain induced local flooding.

> **"The region benefits from an extensive transportation network."**

While largely rural, the region benefits from an extensive transportation network. Interstate 75 is the primary north/south transportation artery that connects the region to central and south Florida, as well as the Southeastern U.S. and Midwest U.S. to the north. Interstate 10 is the east/west transportation artery that connects the region to Jacksonville on the east and the Florida panhandle and Alabama to the west. Rail service in the region is provided by CSX Transportation, Norfolk Southern and other providers. Although the region is not home to a deepwater port, Columbia County will be host to an inland port facility that will be part of the Port of Jacksonville's international trade zone. There are numerous airport facilities in the region with substantial runway infrastructure. Currently, the Gainesville Regional Airport is the only airport with scheduled commercial service.


Intersection of Interstates 10 and 75, Columbia Co.

The economy of the region has proven relatively stable in relation to other areas of the state and nation. While the region has been negatively affected by the national economic downturn, overall it has fared better than many other areas, with lower unemployment rates, rising trade exports and steadily rising Gross Domestic Product. State and local government, especially in education and prisons, remains a significant though declining share of employment in the region. Health care is the second largest employment cluster in the region, followed by retail trade.

"The region is becoming known as an innovation center."

The region is rapidly becoming known as an innovation center due to the success of the Sid Martin Biotechnology Incubator in Alachua and the emergence of the Florida Innovation Hub at the University of Florida in Gainesville. A 2006 study by the Milken Institute identified the University of Florida as the top performing public institution at transferring its research to the marketplace, and fifth in the nation overall. Companies launched at the Sid Martin Biotechnology Incubator have attracted over one-half billion dollars in private investments, contracts and grants. An estimated 16 percent of all biotech companies in Florida got their start at the Sid Martin facility.

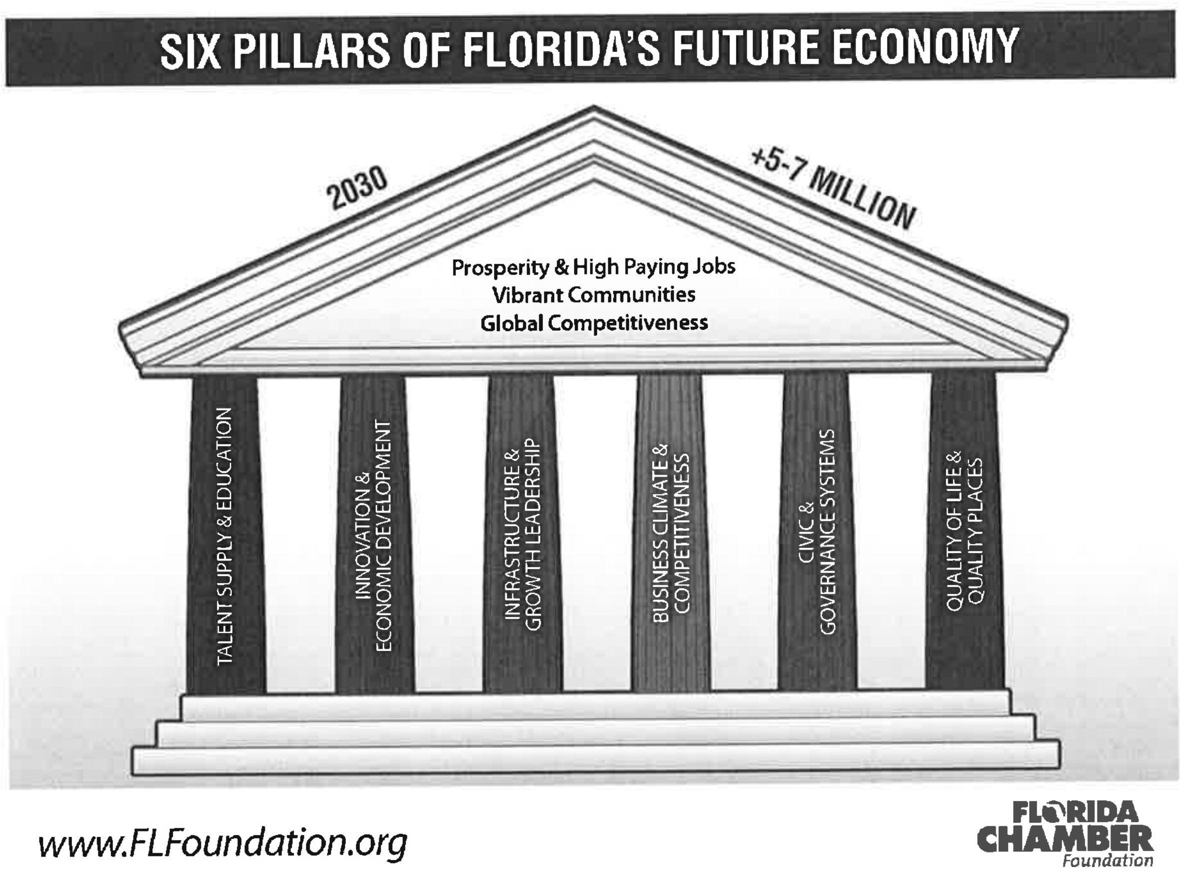

Sid Martin Biotechnology Incubator, Alachua

B. Goals and Objectives

The Comprehensive Economic Development Strategy establishes the goals and objectives necessary to solve the economic problems and capitalize on the resources of the region. Strategic projects, programs and activities identified in the Strategy are designed to fulfill these goals and objectives. The goals and objectives are organized using the Florida Chamber Foundation's Six Pillars of Florida's Future Economy.

"Florida Chamber Foundation's Six Pillars is organizing framework for Goals and Objectives."

- Goals are broad, primary regional expectations.
- Objectives are more specific than goals, clearly measurable, and stated in realistic terms considering what can be accomplished over the five-year time frame of the Strategy.



The table below is the, "at-a-glance," version of the North Central Florida Economic Development District Comprehensive Economic Development Strategy.

1. Talent Supply & Education

"Connect and align education and workforce."

GOAL 1 - Connect and align education and workforce development programs to develop the region's current and future talent supply chain and meet employer needs.

Objective 1.1 - Expand options for high school students to become industry certified while still in high school, as an alternative to college path.

Objective 1.2 - Integrate education, training and workforce development to develop a strong supply chain.

Objective 1.3 - Support efforts by Florida Gateway College, North Florida Community College and Santa Fe College to expand education programs in healthcare related fields and create a marketing strategy to promote enrollment in health professions programs.

Objective 1.4 - Support the creation of electronic medical records education and training programs utilizing a regional community-adaptive health information technology model.

University of Florida Graduation, Gainesville

GOAL 2 - Expand access to education and training programs for talent in distressed markets (e.g., rural, urban core) throughout the region.

Objective 2.1 - Support the creation of online and distance learning programs for students that lack other means of attaining necessary training.

2. Innovation & Economic Development

GOAL 3 - Grow, sustain and integrate efforts related to research and development, technology commercialization, and seed capital to create, nurture and expand regional innovation businesses.

"Integrate research and commercialization to nurture innovation."

Objective 3.1 - Support development of the Innovation Square research and development park in Gainesville, and the integration of the University of Florida's research enterprise and commercialization programs into the fabric of the Innovation Square project through the Florida Innovation Hub at the University of Florida.

Objective 3.2 - Support the development of existing and new business incubators and accelerators throughout the region.

GOAL 4 - Increase the number of regional businesses engaged in selling goods and services internationally and the diversification of the markets they serve.

Objective 4.1 - Provide educational opportunities to regional businesses interested in international trade on the advantages of exporting their goods and services.

GOAL 5 - Brand and market the north central Florida region as the best location for business.

Objective 5.1 - Support the North Florida Economic Development Partnership asset mapping and geographic information system projects in the region.

Objective 5.2 - Support the development of the Enterprise Florida/Rural Economic Development Initiative Catalyst Sites located in Columbia County and Suwannee County by pursuing funding sources for the infrastructure necessary to develop the catalyst sites to shovel ready status.

Florida Innovation Hub at the University of Florida, Gainesville

GOAL 6 - Promote the continued viability of military installations in close proximity to the region.

Objective 6.1 - Improve collaboration between local government and military leaders to utilize best management practices that ensure successful economic partnerships.

3. Infrastructure & Growth Leadership

GOAL 7 - Modernize the region's transportation, telecommunications, energy, water and wastewater systems to meet future demand and respond to changing business needs.

"Modernize infrastructure of region."

Objective 7.1 - Support the development of diverse, reliable and cost effective energy sources and systems to meet the region's economic and environmental goals.

Objective 7.2 - Ensure the future supply and quality of water to meet the region's economic and quality of life goals by encouraging the use of the groundwater resources of the region in a sustainable manner and by strengthening local control of area surface and groundwater systems and supplies.

Objective 7.3 - Develop and maintain a cutting-edge telecommunications infrastructure by supporting the North Florida Broadband Authority's initiative to bring high-speed internet service to the rural areas of the region.

Objective 7.4 - Develop and maintain multimodal, interconnected trade, logistics and transportation systems to enhance freight mobility in support of a prosperous, competitive economy.

Objective 7.5 - Support the continued development of the Gainesville Regional Airport as part of the State's Strategic Intermodal System and promote the designation of the Lake City Municipal Airport as part of the State's Strategic Intermodal System.

GOAL 8 - Improve coordination of economic development, land use, infrastructure, water, energy, natural resources, workforce and community development decision-making and investments at the regional level.

Double Helix Pedestrian Bridge, Gainesville

Objective 8.1 - Improve collaboration and alignment between regional and local agencies and business leaders through a regional vision.

4. Business Climate & Competitiveness

GOAL 9 - Streamline permitting, development and other regulatory processes at the local level to meet changing business needs and provide a predictable legal and regulatory environment in the region.

"Streamline permitting to provide predictability."

Objective 9.1 - Reduce barriers to small business and entrepreneurial growth.

Objective 9.2 - Develop a government revenue structure that encourages business growth and development.

GOAL 10 - Ensure local government agencies provide collaborative, seamless, consistent and timely customer service to regional businesses.

Groundbreaking for Florida Innovation Hub, Gainesville

Objective 10.1 - Work with water management districts in the region to simplify permitting process for new and expanding businesses.

GOAL 11 - Expand opportunities for access to capital for businesses throughout their life cycle.

Objective 11.1 - Create a database of capital sources available to regional businesses.

5. Civic & Governance Systems

GOAL 12 - Support and sustain regional partnerships to accomplish the region's economic and quality of life goals.

"Support and sustain regional partnerships."

Objective 12.1 - Utilize the North Florida Economic Development Partnership's Economic Development Academy as a vehicle to provide a functional understanding of economic development concepts to local elected officials.

Objective 12.2 - Work with the Florida Association of Counties and the Florida League of Cities to add economic development information to their curriculums for newly elected officials.

Objective 12.3 - Invest in strategic regional economic development priorities.

Columbia County Courthouse, Lake City

6. Quality of Life & Quality Places

GOAL 13 - Ensure future growth and development decisions maintain a balance between sustaining the region's environment and enhancing the region's economy and quality of life.

"Create and sustain vibrant, healthy communities."

Objective 13.1 - Create and sustain vibrant, healthy communities that attract workers, businesses, residents and visitors to the region.

Objective 13.2 - Promote and incentivize local government in the development of vibrant city centers.

GOAL 14 - Promote, develop, and leverage the region's natural and cultural assets in a sustainable manner.

Objective 14.1 - Support the efforts of the Original Florida Tourism Task Force and other regional tourism marketing organizations to develop sustainable tourism-based economic development programs and increase the entrepreneurial capacity of the hospitality industry.


Downtown Festival and Arts Show, Gainesville

Objective 14.2 - Improve the branding and awareness of the region as a tourism destination by leveraging regional resources with VISIT FLORIDA, the State's official tourism marketing organization.

Objective 14.3 - Promote and support the state parks within the region and improve branding and awareness of the parks as a tourist destination.

C. Plan of Action

The North Central Florida Economic Development District will coordinate the Comprehensive Economic Development Strategy projects and activities with local and state economic development agencies where appropriate. The plan of action will implement the goals and objectives of the Strategy in alignment with the Florida Strategic Five-Year Plan for Economic Development as follows:

1. Conduct regular meetings of the Comprehensive Economic Development Strategy Committee to monitor the status of regional projects and Comprehensive Economic Development Strategy implementation. District staff will actively participate in economic development activities in the region and provide technical assistance when needed.

"Support Rural Areas of Critical Economic Concern Catalyst Sites."

2. Support the North Florida Economic Development Partnership and the development of the North Central Florida Rural Area of Critical Economic Concern Catalyst Sites in Columbia and Suwannee Counties by serving on the Partnership's Board of Directors and providing technical assistance when necessary.

3. Promote sustainable economic development through regional tourism promotion, while encouraging the preservation of resources that bring visitors to the area. The North Central Florida Economic Development District will provide professional staffing services to the Original Florida Tourism Task Force to implement their regional marketing strategies.

"Support regional tourism promotion."

4. Identify economic development projects that may qualify for federal and state funding opportunities and provide grant writing and administrative services where needed.

Downtown Redevelopment, Gainesville

5. Provide technical assistance in the form of economic impacts analysis, research and best practices to local economic development organizations and government agencies.

6. Facilitate coordination between regional economic development strategies and the state's five-year economic development plan.

D. Strategic Projects, Programs and Activities -

Vital Project Areas of the North Central Florida Economic Development District

1. Talent Supply & Education

a. Support the development of educational programs to increase the labor force in the healthcare and life sciences industry.

"Vital Project Areas focus on strengthening the regional economy."

2. Innovation & Economic Development

a. Support the development of the catalyst sites for the North Central Florida Rural Area of Critical Economic Concern.

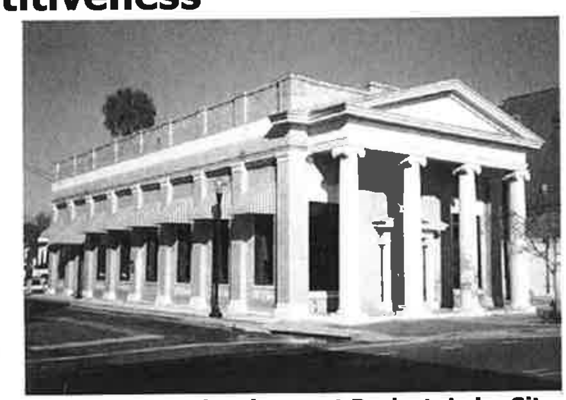
b. Support the development and expansion of regional business incubators and research parks.

3. Infrastructure & Growth Leadership

a. Support continuing improvements to multi-modal infrastructure, including highway interchanges along interstate corridors, railway corridors, airport facilities and broadband infrastructure.

4. Business Climate & Competitiveness

a. Support streamlining processes at the local level to encourage new businesses to open and help existing businesses thrive.


Downtown Redevelopment Project, Lake City

5. Civic & Governance Systems

a. Support programs to educate local government officials in the fundamentals of economic development.

6. Quality of Life & Quality Places

a. Support regional tourism promotional initiatives.

Appendix
Technical Report

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Appendix - Technical Report:

A. Analysis of Economic Development Problems and Opportunities

1. Talent Supply & Education

Talent Supply & Education:
"Education and training are essential to the future workforce of the region."

The region is beginning to face an emerging talent gap - a critical shortage in human capital that represents a vast and growing unmet need for a highly skilled and educated workforce. In the coming years, new products and services will be developed to address the most pressing environmental, medical, and transportation challenges of the world. Communities that are home to those breakthroughs will reap the economic rewards of leadership. Education and training are essential to the future workforce of the region.

a. Average Annual Wages

As shown in Table A-1 and Illustration A-1, average annual wages in the region as a whole lag significantly behind average annual wages for the state. In 2010, Alachua County, which as the largest economy of any county in the region and average annual wages over $39,000, is nearly $4,000 lower than state averages. In 2010, Suwannee County, with the lowest average annual wages in the region at just over $30,000, has a nearly $13,000 disparity with state average wages. Illustration A-1 demonstrates that the disparity in regional average annual wages is a long-term phenomenon, as regional average annual wages have been consistently below state averages for several years running.

Table A-1

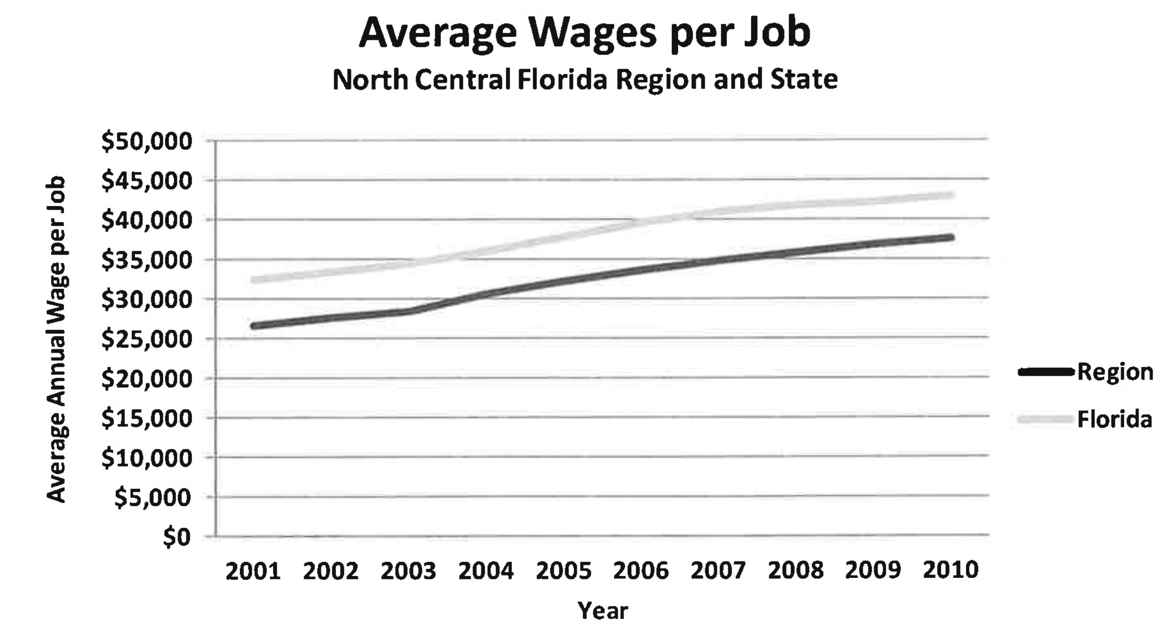
Average Wages per Job
North Central Florida Region and State
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	$27,190	$28,445	$29,216	$31,690	$33,439	$35,056	$36,468	$37,469	$38,745	$39,517
Bradford	$27,289	$28,244	$29,022	$30,370	$31,114	$31,204	$32,138	$32,889	$33,051	$33,075
Columbia	$26,586	$27,019	$27,739	$29,139	$30,718	$31,787	$32,818	$33,375	$34,296	$35,511
Dixie	$24,882	$25,662	$25,343	$26,900	$28,413	$28,399	$28,736	$29,651	$29,544	$30,266
Gilchrist	$23,970	$24,242	$24,754	$26,858	$27,666	$28,529	$28,861	$30,568	$31,380	$31,709
Hamilton	$31,693	$30,839	$32,547	$35,532	$37,306	$37,424	$37,149	$38,488	$43,565	$41,250
Lafayette	$21,957	$22,166	$23,631	$24,964	$26,007	$27,462	$28,380	$29,336	$30,420	$30,536
Madison	$21,748	$22,277	$23,361	$24,846	$25,752	$27,216	$28,470	$29,386	$30,148	$30,680
Suwannee	$22,361	$23,128	$24,025	$25,856	$26,812	$28,289	$28,871	$30,067	$29,651	$30,182
Taylor	$28,157	$28,375	$29,448	$29,653	$31,376	$32,128	$34,359	$34,873	$35,462	$37,497
Union	$27,303	$27,708	$28,437	$30,221	$31,806	$32,816	$33,054	$33,452	$34,996	$35,032
Region	$26,708	$27,684	$28,483	$30,642	$32,229	$33,605	$34,841	$35,803	$36,909	$37,614
Florida	$32,416	$33,406	$34,534	$36,148	$37,951	$39,663	$41,029	$41,818	$42,228	$43,033

Source: U.S. Bureau of Economic Analysis website <www.bea.gov/iTable/iTable.cfm?reqid=70&step=1>

Illustration A-1

Average Wages per Job
North Central Florida Region and State
2001 to 2010



Source: U.S. Bureau of Economic Analysis

b. High School Graduation Rates

As shown in Table A-2 and Illustration A-2, the regional High School Graduation Rate has consistently trailed that of the state, though usually only falling short by within one to two percentage points. In 2010, seven of the 11 counties in the region fell below the overall state rate, with only four counties exceeding state rates. Illustration A-2 demonstrates that although regional graduation rates have lagged behind state rates, the overall trend line for the region is positive, improving from below 70 percent in the 2001-02 school year to nearly 80 percent in 2010-11.

Table A-2

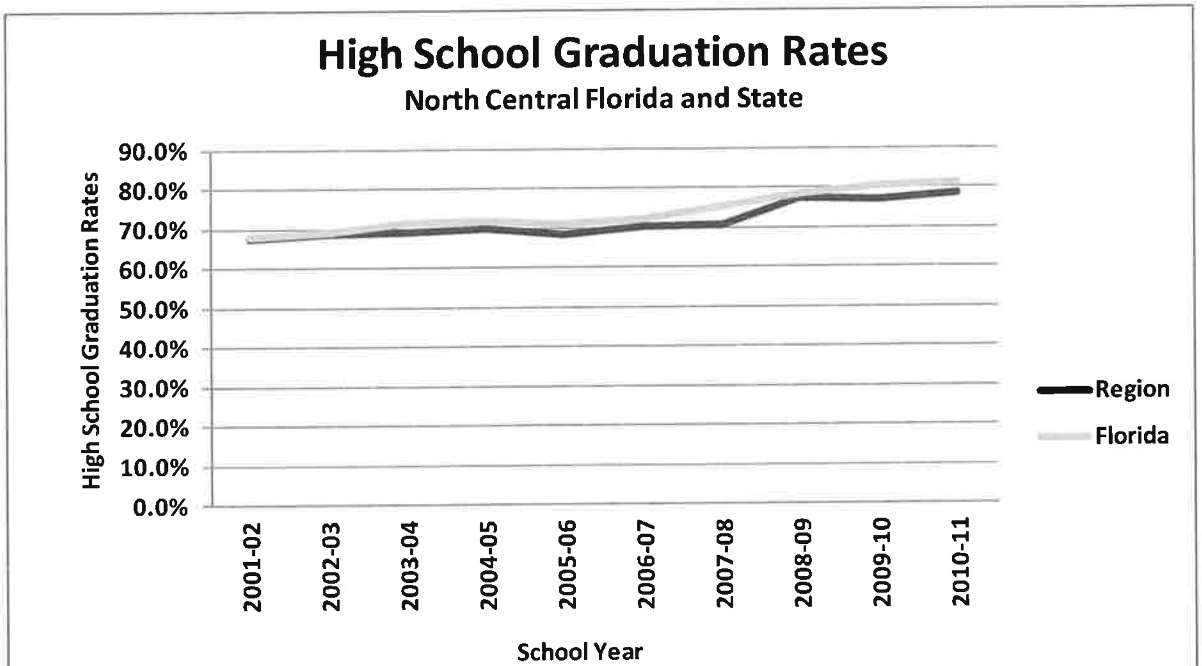
High School Graduation Rates
North Central Florida Region and State
School Years 2001-02 to 2010-11

Area	School Year									
	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
Alachua	66.4%	67.5%	68.8%	69.6%	69.8%	68.2%	68.3%	77.1%	76.6%	78.1%
Bradford	75.2%	74.7%	70.5%	76.1%	69.5%	70.7%	75.4%	78.4%	71.1%	73.3%
Columbia	68.1%	73.1%	75.6%	74.7%	67.4%	74.1%	77.6%	87.8%	88.5%	87.2%
Dixie	69.7%	66.2%	66.3%	63.5%	70.0%	70.5%	66.5%	72.0%	69.0%	78.2%
Gilchrist	52.4%	48.1%	43.1%	45.9%	43.9%	53.3%	56.1%	64.2%	63.4%	67.6%
Hamilton	83.8%	87.8%	93.8%	91.4%	83.8%	85.1%	89.1%	89.5%	96.2%	95.8%
Lafayette	64.5%	71.8%	64.9%	68.1%	53.5%	64.2%	57.5%	62.8%	51.6%	58.0%
Madison	77.5%	90.7%	89.8%	90.4%	89.7%	90.7%	95.9%	93.8%	91.2%	84.0%
Suwannee	71.2%	72.3%	69.1%	62.0%	65.1%	74.4%	71.6%	72.4%	74.5%	68.5%
Taylor	68.7%	71.2%	74.1%	78.7%	78.3%	77.4%	74.0%	75.1%	74.7%	77.8%
Union	78.4%	67.1%	79.2%	84.1%	76.7%	81.7%	71.4%	80.7%	76.4%	93.2%
Region	67.5%	68.6%	69.3%	69.9%	68.5%	70.4%	70.6%	77.4%	77.0%	78.5%
Florida	67.9%	69.0%	71.6%	71.9%	71.0%	72.4%	75.4%	78.6%	80.7%	81.2%

Source: Florida Department of Education, Data Publications and Reports: Students
www.fldoe.org/eias/eiaspubs/pubstudent.asp

Illustration A-2

High School Graduation Rates
North Central Florida Region and State
School Years 2001-02 to 2010-11



Source: Florida Department of Education, Data Publications and Reports: Students

c. 8th Grade Math Performance

As shown in Table A-3 and Illustration A-3, eighth grade math performance on the Florida Comprehensive Assessment Test in the region has improved over the 2001 to 2010 time frame, but has dropped below the state performance levels for the period. In 2010, only two school districts, Dixie and Gilchrist, exceeded state levels. Given the growing demands of employers for workers proficient in science, technology, engineering and mathematics, this is a critical indicator for the region as it focuses on becoming more competitive with other regions in Florida and the southeastern U.S.

Table A-3

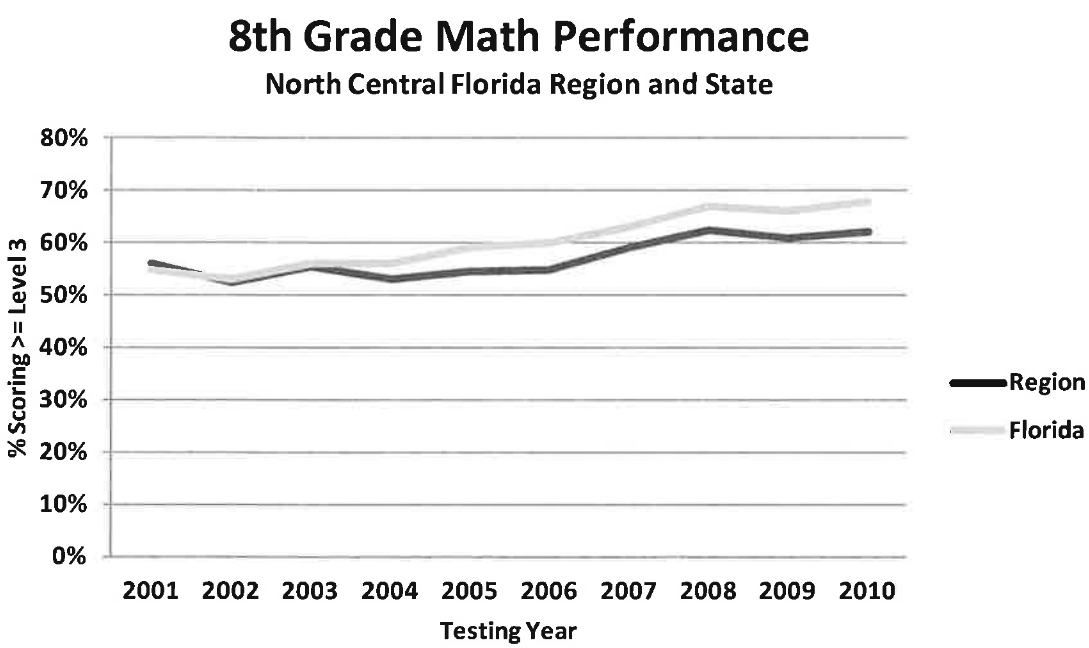
**Eighth Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5 on
Florida Comprehensive Assessment Test
North Central Florida Region and State
2001 to 2010**

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	62%	59%	60%	58%	56%	57%	61%	67%	62%	65%
Bradford	43%	45%	52%	48%	51%	42%	55%	57%	50%	52%
Columbia	49%	47%	50%	53%	54%	53%	56%	55%	60%	57%
Dixie	43%	46%	35%	46%	55%	53%	57%	73%	67%	69%
Gilchrist	68%	63%	75%	69%	65%	73%	75%	76%	70%	82%
Hamilton	37%	42%	31%	26%	34%	28%	47%	43%	49%	39%
Lafayette	67%	63%	77%	63%	52%	51%	73%	72%	77%	64%
Madison	41%	22%	34%	31%	39%	40%	38%	46%	32%	41%
Suwannee	57%	46%	54%	50%	56%	56%	57%	58%	63%	61%
Taylor	53%	53%	58%	55%	63%	65%	69%	64%	72%	64%
Union	68%	54%	58%	43%	57%	59%	58%	62%	66%	66%
Region	56%	52%	55%	53%	55%	55%	59%	63%	61%	62%
Florida	55%	53%	56%	56%	59%	60%	63%	67%	66%	68%

Source: Florida Department of Education, Florida Comprehensive Assessment Test <https://app1.fldoe.org/FCATDemographics/Selections.aspx?reportTypeID=1&level=District&subj=Math>

Illustration A-3

Eighth Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5 on
Florida Comprehensive Assessment Test
North Central Florida Region and State
2001 to 2010



Source: Florida Department of Education, Florida Comprehensive Assessment Test

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2. Innovation & Economic Development

Innovation & Economic Development:

"Innovation and economic development will be paramount to secure economic prosperity."

Too often limited to the academic realms of research institutions, innovation must be an integral part of the businesses of the region. Competitiveness and prosperity in the 21st Century will be based on technology, knowledge and innovation. Transforming the existing business base is the key to retention and expansion. Economic development tied to innovation requires a comprehensive understanding of what is necessary and prudent to incentivize business growth. Demands for return on investment have never been greater. As new industries emerge and legacy industries must contend with pressure from the processes of creative destruction, the role of innovation and economic development will be paramount to secure economic prosperity.

a. Gross Domestic Product

As shown in Table A-4 and Illustration A-4, gross domestic product is the market value of all goods and services produced within the area during the year. The Gross Domestic Product of the region has maintained a positive upward trend, with slight declines during the economic downturn years of 2008 and 2009. Ten of the 11 counties in the region experienced at least modest gains in their Gross Domestic Product over the period 2001 to 2010, with Madison County ending the decade at the same level as the start of the decade. As demonstrated in Illustration A-4, the region has recovered growth in its Gross Domestic Product more rapidly that the state following the economic downturn.

Table A-4

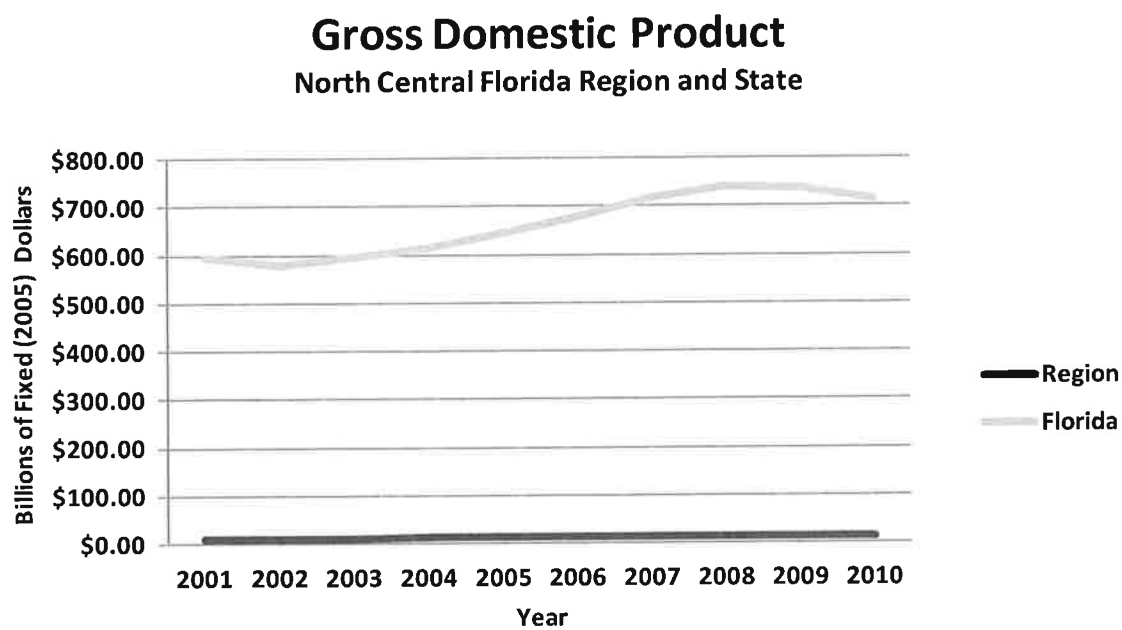
Gross Domestic Product
North Central Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	$7.85	$7.98	$8.08	$8.74	$9.14	$9.38	$9.44	$9.41	$9.29	$9.50
Bradford	$0.41	$0.44	$0.43	$0.48	$0.51	$0.53	$0.54	$0.52	$0.50	$0.52
Columbia	$1.22	$1.27	$1.26	$1.35	$1.49	$1.54	$1.59	$1.58	$1.53	$1.60
Dixie	$0.15	$0.16	$0.13	$0.16	$0.18	$0.18	$0.18	$0.17	$0.17	$0.18
Gilchrist	$0.16	$0.17	$0.17	$0.19	$0.19	$0.20	$0.20	$0.20	$0.20	$0.20
Hamilton	$0.22	$0.21	$0.24	$0.25	$0.28	$0.27	$0.26	$0.26	$0.27	$0.25
Lafayette	$0.08	$0.08	$0.09	$0.09	$0.09	$0.10	$0.10	$0.10	$0.10	$0.11
Madison	$0.29	$0.28	$0.27	$0.28	$0.31	$0.29	$0.28	$0.28	$0.28	$0.29
Suwannee	$0.55	$0.59	$0.58	$0.62	$0.66	$0.69	$0.69	$0.66	$0.66	$0.69
Taylor	$0.39	$0.42	$0.42	$0.44	$0.47	$0.48	$0.48	$0.49	$0.47	$0.50
Union	$0.20	$0.20	$0.22	$0.22	$0.23	$0.24	$0.22	$0.22	$0.22	$0.22
Region	$11.52	$11.80	$11.88	$12.82	$13.54	$13.89	$13.97	$13.89	$13.70	$14.06
Florida	$596.72	$579.57	$596.72	$616.75	$644.25	$680.00	$717.59	$742.52	$737.83	$716.05

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

Illustration A-4

Gross Domestic Product
North Central Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010



Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

b. Tourism Development Tax Collections

As shown in Table A-5 and Illustration A-5, tourism development taxes are collected on the value of overnight accommodations at hotels, bed and breakfast, recreational vehicle and camping sites and are used as a measurement of overall tourism activity in an area. Based on this measure, the region has experienced steady growth in tourism over the decade from Fiscal Year 2000-01 to Fiscal Year 2009-10 period, with slight declines in Fiscal Year 2008-09, due primarily to the economic downturn. Three counties, Dixie, Lafayette and Union, did not collect tourism development taxes for the period.

Table A-5

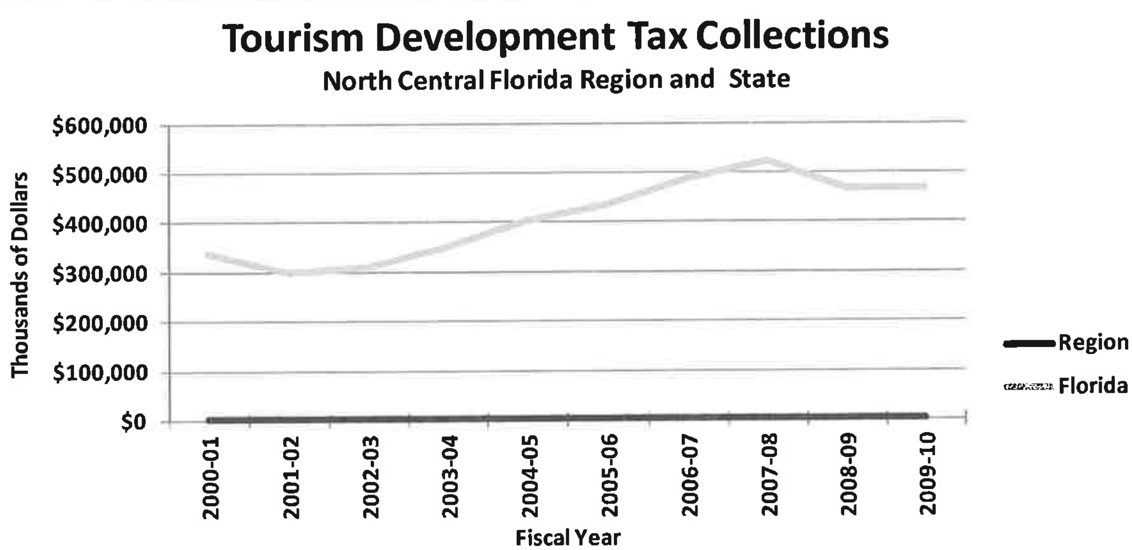
Tourism Development Tax Collections
North Central Florida Region and State
Thousands of Dollars
2000-01 to 2009-10

Area	Fiscal Year									
	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Alachua	$1,440	$1,405	$1,428	$1,606	$1,758	$1,968	$2,238	$2,278	$1,980	$2,133
Bradford	$46	$50	$48	$52	$52	$53	$68	$108	$102	$90
Columbia	$299	$299	$313	$325	$375	$421	$401	$392	$383	$385
Dixie	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Gilchrist	$0	$0	$0	$0	$0	$0	$8	$21	$21	$26
Hamilton	$32	$37	$32	$33	$36	$47	$52	$44	$33	$24
Lafayette	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Madison	$43	$42	$49	$68	$78	$87	$95	$86	$80	$70
Suwannee	$56	$71	$77	$84	$98	$103	$107	$117	$103	$101
Taylor	$84	$88	$94	$104	$102	$126	$153	$172	$173	$180
Union	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Region	$1,999	$1,990	$2,042	$2,272	$2,499	$2,806	$3,121	$3,218	$2,875	$3,009
Florida	$335,845	$300,594	$310,386	$350,471	$405,155	$436,165	$489,307	$524,341	$466,657	$466,707

Source: Florida Department of Revenue website, Local Government Tax Receipts by County, <http://dor.myflorida.com/dor/taxes/colls_to_7_2003.html>
Note: Values presented in thousands of dollars.

Illustration A-5

Tourism Development Tax Collections
North Central Florida Region and State
Thousands of Dollars
2000-01 to 2009-10



Source: Florida Department of Revenue, Local Government Tax Receipts by County

c. Trade Exports and Imports

As shown in Table A-6a and Illustration A-6a, trade exports is a measure of all goods and services produced in the region and sold outside the region. Comparing Trade Exports to Trade Imports reveals whether the region is bringing in more outside money from exports than it sends out by purchasing imported goods and services. In 2001, the region imported almost 40 percent more goods and services than it exported, while in 2010, the ratio of exports to imports dropped to approximately 36 percent, as opposed to the state ratios of over 3.8 percent in 2001 and over 2.7 percent in 2010. While the export to import ratio dropped by four percent over the ten-year period, there is still significant leakage of capital from the region.

Table A-6a

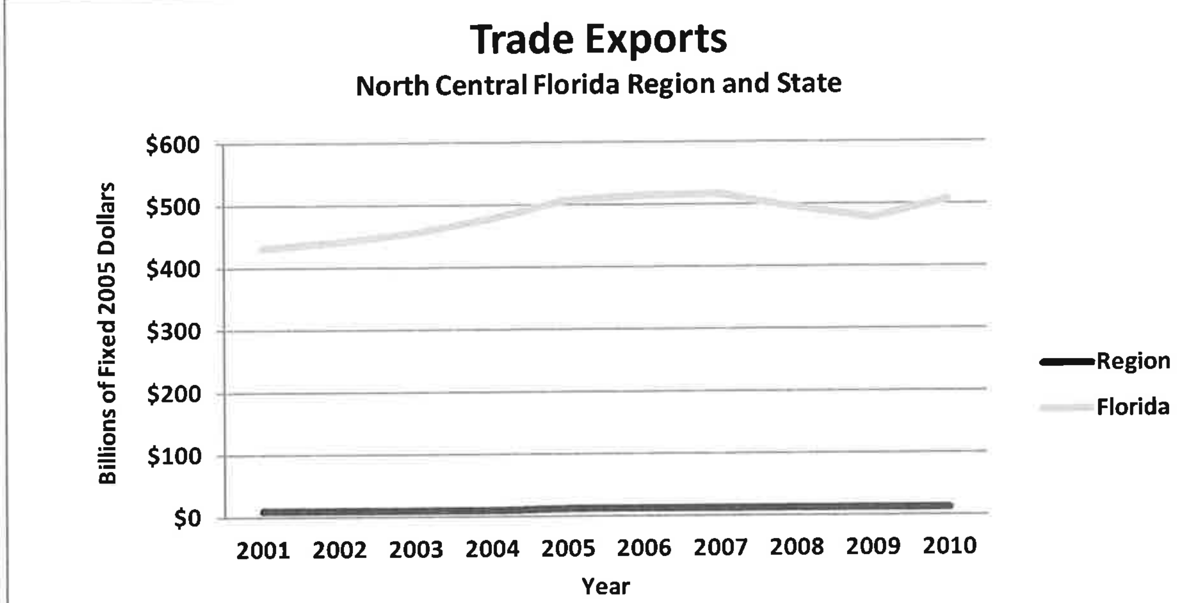
Trade Exports
North Central Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	$5.32	$5.36	$5.53	$5.57	$5.91	$6.07	$6.26	$6.29	$6.11	$6.39
Bradford	$0.36	$0.40	$0.36	$0.41	$0.45	$0.48	$0.49	$0.47	$0.46	$0.49
Columbia	$1.07	$1.21	$1.18	$1.23	$1.40	$1.41	$1.50	$1.47	$1.38	$1.46
Dixie	$0.16	$0.17	$0.14	$0.18	$0.21	$0.21	$0.20	$0.19	$0.20	$0.22
Gilchrist	$0.10	$0.11	$0.10	$0.12	$0.12	$0.13	$0.13	$0.13	$0.14	$0.15
Hamilton	$0.29	$0.27	$0.34	$0.38	$0.46	$0.41	$0.42	$0.41	$0.38	$0.33
Lafayette	$0.06	$0.06	$0.07	$0.06	$0.07	$0.07	$0.08	$0.07	$0.08	$0.08
Madison	$0.33	$0.32	$0.29	$0.32	$0.36	$0.32	$0.27	$0.27	$0.27	$0.29
Suwannee	$0.61	$0.65	$0.63	$0.69	$0.74	$0.77	$0.73	$0.64	$0.65	$0.70
Taylor	$0.56	$0.61	$0.62	$0.66	$0.68	$0.66	$0.68	$0.69	$0.68	$0.74
Union	$0.13	$0.13	$0.15	$0.16	$0.17	$0.17	$0.15	$0.15	$0.15	$0.15
Region	$8.98	$9.28	$9.40	$9.79	$10.56	$10.69	$10.89	$10.78	$10.50	$11.00
Florida	$431.06	$440.19	$454.90	$477.68	$507.90	$513.80	$517.27	$494.13	$478.74	$507.02

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

Illustration A-6a

Trade Exports
North Central Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010



Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

As shown in Table A-6b and Illustration A-6b, from 2001 to 2010 the value of Trade Imports in the region increased by $2.32 billion. Increasing Trade Imports coupled with increased Trade Exports is a sign of positive economic activity in the region. Illustration A-6b demonstrates the decline in imported goods and services after the collapse of the housing market in 2006, which triggered the economic downturn in 2009. By 2010, Trade Imports resumed an upward trend in activity.

Table A-6b

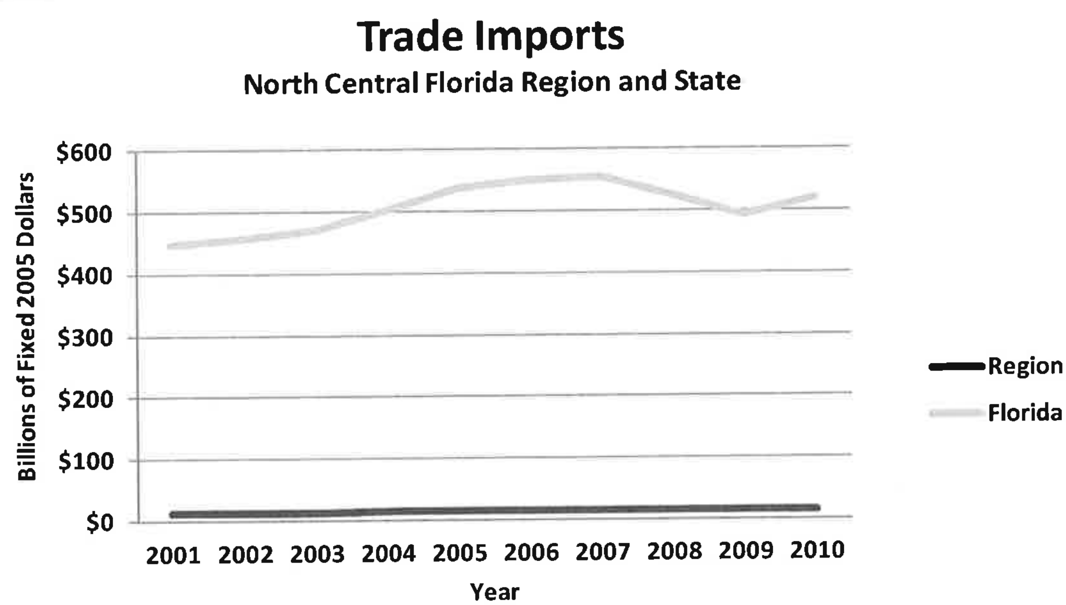
Trade Imports
North Central Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010

	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	$6.72	$6.84	$6.78	$7.37	$7.69	$7.86	$8.01	$7.78	$7.48	$7.79
Bradford	$0.71	$0.72	$0.75	$0.80	$0.83	$0.84	$0.86	$0.83	$0.82	$0.87
Columbia	$1.49	$1.57	$1.58	$1.66	$1.82	$1.87	$1.95	$1.87	$1.78	$1.90
Dixie	$0.35	$0.35	$0.33	$0.36	$0.40	$0.39	$0.38	$0.37	$0.36	$0.39
Gilchrist	$0.37	$0.38	$0.39	$0.42	$0.44	$0.46	$0.47	$0.46	$0.45	$0.48
Hamilton	$0.36	$0.33	$0.39	$0.43	$0.49	$0.47	$0.48	$0.48	$0.43	$0.40
Lafayette	$0.17	$0.17	$0.16	$0.18	$0.18	$0.18	$0.19	$0.19	$0.18	$0.19
Madison	$0.47	$0.46	$0.45	$0.48	$0.51	$0.48	$0.46	$0.46	$0.46	$0.49
Suwannee	$0.93	$0.94	$0.97	$1.06	$1.11	$1.14	$1.16	$1.10	$1.07	$1.15
Taylor	$0.68	$0.70	$0.69	$0.72	$0.79	$0.77	$0.81	$0.80	$0.78	$0.86
Union	$0.32	$0.33	$0.35	$0.36	$0.39	$0.40	$0.38	$0.37	$0.37	$0.38
Region	$12.56	$12.78	$12.84	$13.85	$14.65	$14.85	$15.15	$14.71	$14.17	$14.88
Florida	$447.40	$458.37	$470.73	$503.30	$537.11	$550.05	$555.19	$526.57	$493.46	$520.94

Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

Illustration A-6b

Trade Imports
North Central Florida Region and State
Billions of Fixed 2005 Dollars
2001 to 2010



Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

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3. Infrastructure & Growth Leadership

Infrastructure & Growth Leadership:
"Investment strategies tied to infrastructure targets can yield economic prosperity."

The Infrastructure & Growth Leadership pillar underscores the fundamental contributions of factors such as transportation, communications and land use to the creation and maintenance of a vibrant economy. Early symptoms of distressed infrastructure, if not addressed, can have a crippling effect, undermining the economic health of the region. Congested and deteriorating roadways and railways could choke intra- and inter-state commerce. Failure to provide high-speed communications infrastructure will deter local investments by high-tech industries. In contrast, smart and timely investments in strategies that are tied to infrastructure targets are the medicine for a shared economic prosperity for the region.

a. Population Counts, Estimates and Projections

As shown in Table A-7 and Illustration A-7, the population of the region increased by nearly 14 percent between the 2000 and 2010 decennial census counts, compared with an increase of almost 18 percent for the state. This rate of population increase is expected to remain fairly stable in the region through 2030, while the rate of population increase of the state is projected to decline somewhat to less than 14 percent over the same period. Stagnation in the national economy could alter these projections significantly as a prolonged sluggish housing market will prevent people from selling their homes and relocating to Florida.

Table A-7

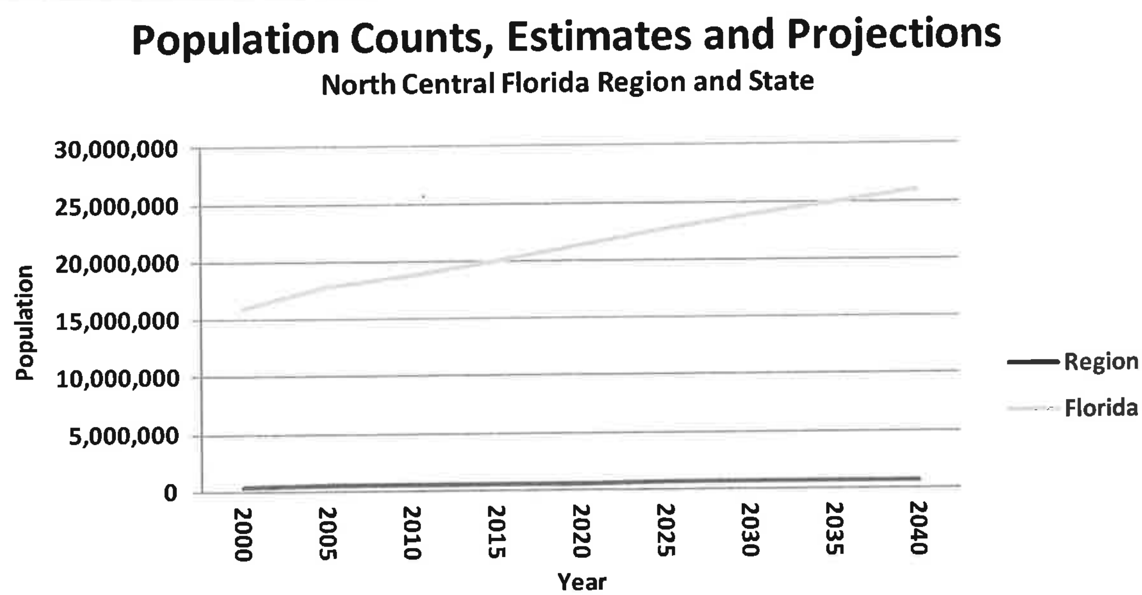
**Population Counts, Estimates and Projections
North Central Florida Region and State
2000 to 2040**

	Census	Estimate	Census	Projections					
	2000	2005	2010	2015	2020	2025	2030	2035	2040
Alachua	217,955	240,764	247,336	258,900	272,200	285,300	297,800	309,400	320,400
Bradford	26,088	28,118	28,520	29,800	30,800	31,800	32,700	33,600	34,400
Columbia	56,513	61,466	67,531	72,100	77,000	81,700	86,000	90,000	93,700
Dixie	13,827	15,377	16,422	36,200	37,600	39,000	40,400	41,700	42,900
Gilchrist	14,437	16,221	16,939	18,200	19,500	20,700	21,900	23,000	23,900
Hamilton	13,327	14,315	14,799	15,200	15,700	16,100	16,500	17,000	17,300
Lafayette	7,022	7,971	8,870	10,700	11,200	11,700	12,200	12,600	13,000
Madison	18,733	19,696	19,224	19,400	19,500	19,600	19,800	19,900	20,000
Suwannee	34,844	38,174	41,551	46,300	49,300	52,200	54,900	57,300	59,600
Taylor	19,256	21,310	22,570	23,100	23,800	24,300	24,900	25,400	25,900
Union	13,442	15,046	15,535	16,100	16,800	17,400	18,100	18,700	19,200
Region	435,444	478,458	499,297	546,000	573,400	599,800	625,200	648,600	670,300
Florida	15,982,400	17,865,737	18,801,310	19,974,400	21,326,800	22,641,300	23,877,900	25,017,100	26,081,800

Source: Florida Statistical Abstract, 2006-2011 Editions, Tables 1.20, 1.40

Illustration A-7

Population Counts, Estimates and Projections
North Central Florida Region and State
2000 to 2040



Source: Florida Statistical Abstract, 2006-2011 Editions, Tables 1.20, 1.40

b. Annual Building Permits

As shown in Table A-8 and Illustration A-8, while the region had significant gains in new construction activity leading up to the collapse of the housing market in 2006, overall activity never reached the excessive levels experienced in other areas of the state. Consequently, when the housing market collapsed, the region likewise did not experience as dramatic a decline as the state as a whole. By 2010, building permit activity in the state had returned to a positive trend, while the number of building permits in the north central Florida region continued to decline.

Table A-8

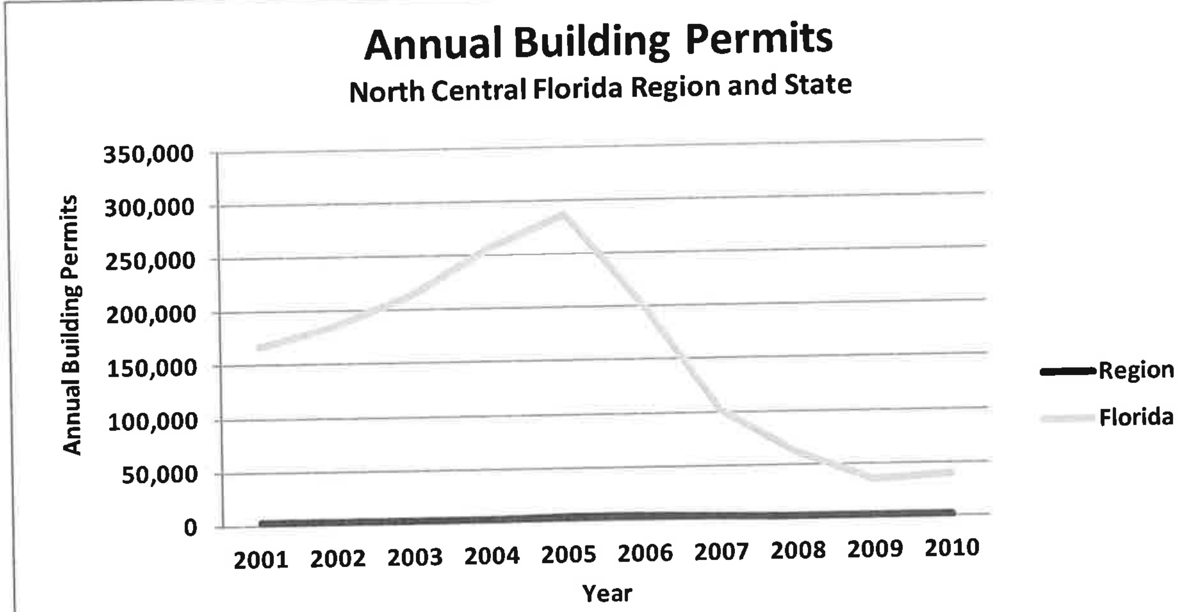
Annual Building Permits
North Central Florida Region and State
Residential Units
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	2335	1791	1684	2009	2293	1949	1388	1006	519	454
Bradford	75	71	93	84	108	124	126	44	24	31
Columbia	266	247	299	380	580	473	326	227	99	84
Dixie	62	54	63	64	180	83	86	53	19	18
Gilchrist	66	93	79	107	102	92	87	48	10	36
Hamilton	27	32	62	34	41	40	46	26	13	22
Lafayette	21	25	23	27	29	26	18	14	10	19
Madison	75	55	67	66	76	89	54	48	32	27
Suwannee	143	131	143	199	210	274	123	52	53	50
Taylor	82	55	56	85	105	75	52	32	17	33
Union	29	33	39	32	46	71	52	22	17	13
Region	3,181	2,587	2,608	3,087	3,770	3,296	2,358	1,572	813	787
Florida	167,035	185,431	213,567	255,893	287,250	203,238	102,551	61,042	35,329	38,679

Source: U.S. Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units, for Counties in Florida. http://censtats.census.gov/bldg/bldgprmt.shtml

Illustration A-8

Annual Building Permits
North Central Florida Region and State
Residential Units
2001 to 2010



Source: U.S. Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units

c. Vehicle Miles Traveled

As shown in Table A-9 and Illustration A-9, vehicle miles traveled is a general indicator of the vitality of the economy of an area. If the economy slows down, people and businesses tend to reduce their expenses by reducing the number of trips taken or by consolidating trips. As the economy improves, less emphasis is placed on mileage reduction. The decline in Daily Vehicle Miles Traveled in the region and state roughly coincides with the decline of the housing market and continued during the economic downturn.

Table A-9

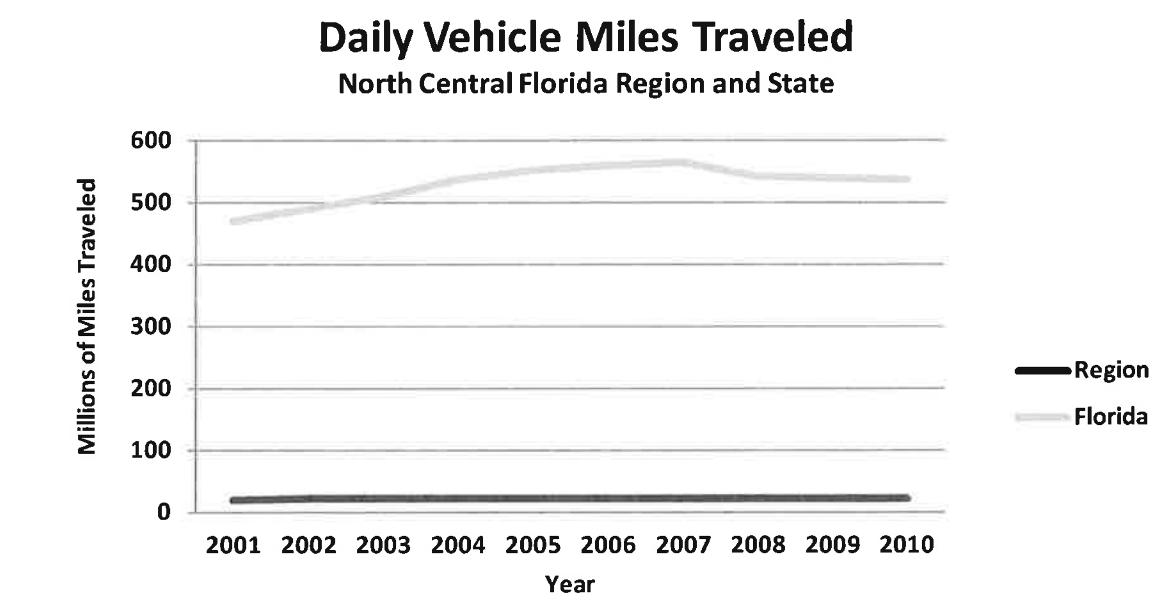
Daily Vehicle Miles Traveled
North Central Florida Region and State
Millions of Miles
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	7.43	7.62	7.96	7.79	8.11	8.10	8.46	8.00	7.83	7.83
Bradford	1.05	1.07	1.05	1.07	1.13	1.09	1.07	1.04	1.03	1.00
Columbia	3.38	3.50	3.50	3.54	3.78	3.70	3.72	3.52	3.57	3.54
Dixie	0.59	0.61	0.62	0.75	0.76	0.83	0.81	0.78	0.78	0.77
Gilchrist	0.62	0.63	0.66	0.71	0.70	0.70	0.67	0.67	0.65	0.66
Hamilton	1.37	1.42	1.49	1.54	1.56	1.59	1.68	1.66	1.54	1.49
Lafayette	0.44	0.46	0.46	0.46	0.47	0.46	0.45	0.45	0.44	0.44
Madison	1.48	1.52	1.50	1.47	1.58	1.57	1.55	1.47	1.48	1.52
Suwannee	2.12	2.16	2.33	2.40	2.54	2.51	2.50	2.39	2.38	2.39
Taylor	1.05	1.05	1.14	1.21	1.22	1.22	1.17	1.11	1.10	1.11
Union	0.41	0.41	0.41	0.44	0.44	0.45	0.43	0.42	0.41	0.41
Region	19.92	20.45	21.12	21.39	22.28	22.22	22.51	21.51	21.20	21.15
Florida	468.57	489.54	508.61	537.49	550.61	558.31	562.80	542.33	538.09	536.32

Source: Florida Department of Transportation, Florida Highway Mileage and Travel Report, Summary since 1990. <http://www.dot.state.fl.us/planning/statistics/mileage-rpts/public.shtm>

Illustration A-9

Daily Vehicle Miles Traveled
North Central Florida Region and State
Millions of Miles
2001 to 2010



Source: Florida Department of Transportation, Florida Highway Mileage and Travel Report, Summary since 1990

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4. Business Climate & Competitiveness

Business Climate & Competitiveness:
"Secure the position of the region as business friendly climate."

Owners and executives making decisions about where they call home evaluate the attractiveness of the region in respect to its competitiveness across a host of business climate factors. According to Florida TaxWatch, Florida ranks highly in measures of business climate owing to the absence of a personal income tax; its openness and growth in international trade; and its general hospitableness to entrepreneurs and small businesses. Unfortunately, Florida ranks poorly in measures of high business costs, especially property tax burdens, state and local sales, excise and gross receipt tax burdens and general business costs. Vigilance in monitoring the position of the region relative to other competitive locations is critical to securing the position of the region among the most business-friendly climates.

a. Average Annual Unemployment Rates

As shown in Table A-10 and Illustration A-10, the region has usually experienced lower rates of unemployment than the state. While several factors contribute to these lower unemployment rates, a primary factor is the higher public sector employment rate in the region as compared to the state.

Table A-10

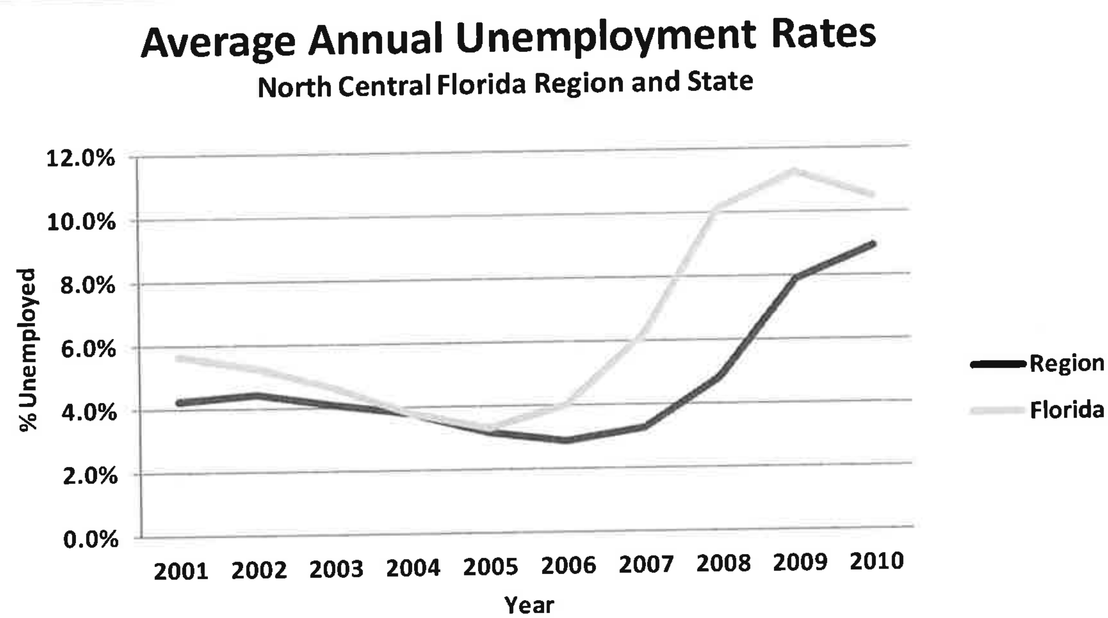
Average Annual Unemployment Rates
North Central Florida Region and State
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	3.5%	3.9%	3.6%	3.4%	2.9%	2.6%	2.9%	4.2%	6.9%	7.9%
Bradford	4.4%	4.3%	4.0%	3.8%	3.1%	2.8%	3.3%	4.7%	7.8%	9.2%
Columbia	5.4%	5.3%	4.7%	4.2%	3.4%	3.2%	3.5%	5.4%	9.0%	10.1%
Dixie	5.5%	5.1%	5.1%	5.1%	3.7%	3.4%	4.2%	7.2%	11.1%	13.0%
Gilchrist	4.3%	4.9%	4.3%	3.9%	3.1%	2.8%	3.7%	5.5%	9.1%	9.9%
Hamilton	7.5%	6.1%	5.4%	4.7%	4.0%	3.7%	4.5%	7.0%	10.8%	11.8%
Lafayette	5.3%	4.8%	4.1%	3.2%	3.0%	2.7%	2.9%	4.4%	7.3%	8.6%
Madison	5.0%	5.2%	5.0%	5.2%	4.6%	5.0%	5.9%	6.8%	10.4%	11.4%
Suwannee	5.0%	5.0%	4.6%	4.2%	3.6%	3.2%	3.5%	5.8%	9.4%	10.0%
Taylor	6.6%	6.6%	6.6%	5.3%	4.0%	3.9%	4.1%	6.4%	10.4%	11.2%
Union	5.0%	3.8%	3.7%	3.6%	3.0%	2.6%	3.0%	4.7%	7.3%	8.7%
Region	4.3%	4.5%	4.1%	3.8%	3.2%	2.9%	3.3%	4.9%	7.9%	8.9%
Florida	5.7%	5.3%	4.7%	3.8%	3.3%	4.0%	6.2%	10.2%	11.3%	10.5%

Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics
<http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/local-area-unemployment-statistics>

Illustration A-10

Average Annual Unemployment Rates
North Central Florida Region and State
2001 to 2010



Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics

b. Employment by Industry

As shown in Table A-11a and Illustration A-11a, state government, health care, retail trade and local government have remained the predominant employment industries from 2001 to 2010 in the region. While still the largest single employer in the region in 2010, employment in State Government did decline by nearly 9 percent over the period. Private sector industries that posted significant employment gains over the period include Health Care, Accommodation and Food Services, Professional and Technical Services, Real Estate, Transportation and Warehousing and Utilities.

Table A-11a

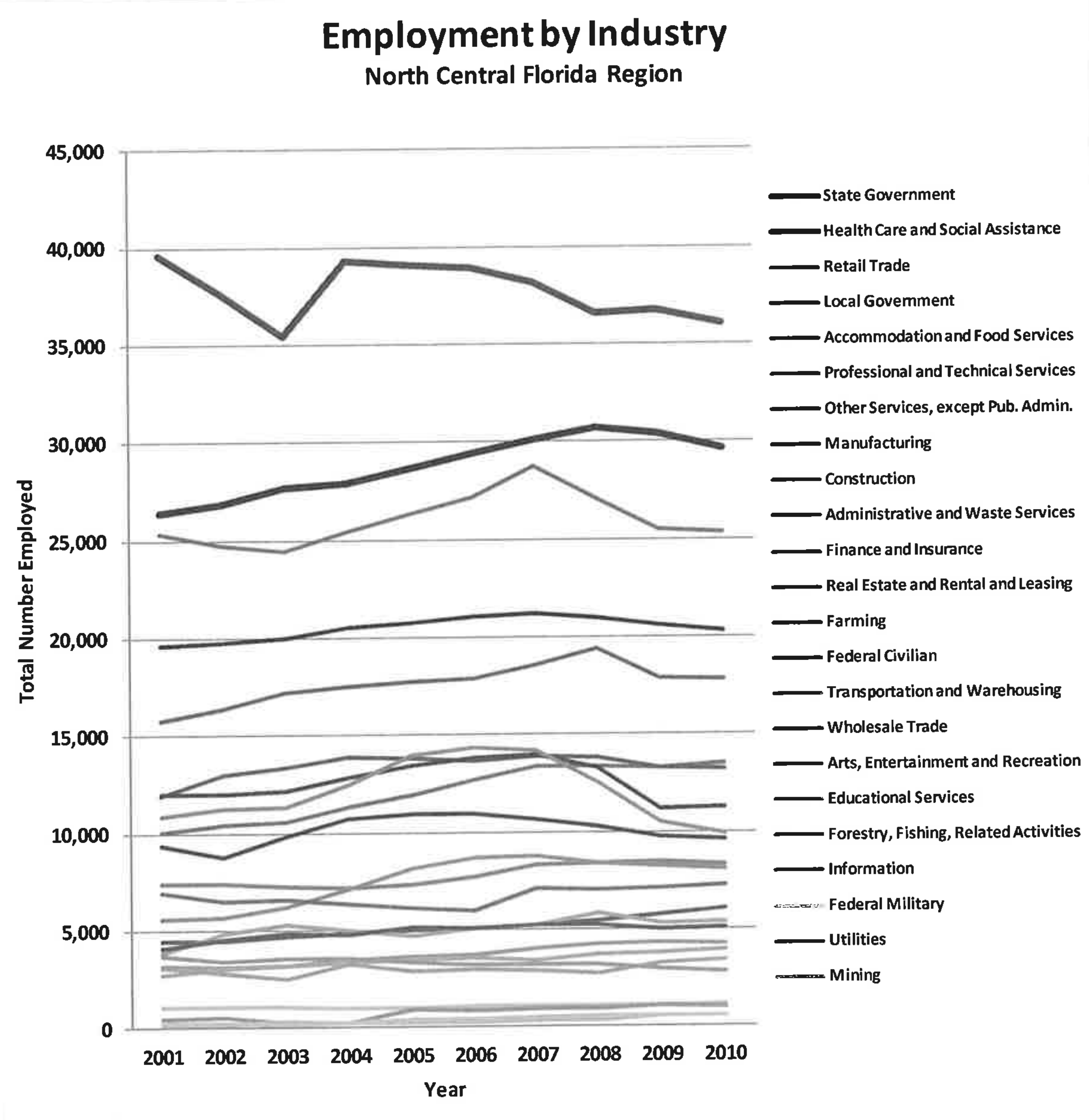
Employment by Industry
North Central Florida Region
2001 to 2010

Industry	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
State Government	39,578	37,652	35,485	39,290	39,111	38,917	38,161	36,609	36,777	36,044
Health Care and Social Assistance	26,444	26,858	27,677	27,951	28,702	29,439	30,074	30,717	30,433	29,625
Retail Trade	25,367	24,769	24,432	25,451	26,357	27,164	28,717	27,079	25,538	25,400
Local Government	19,599	19,752	20,006	20,546	20,772	21,044	21,191	21,006	20,596	20,290
Accommodation and Food Services	15,809	16,394	17,197	17,529	17,758	17,893	18,587	19,381	17,897	17,814
Professional and Technical Services	10,078	10,475	10,610	11,370	11,955	12,736	13,396	13,361	13,271	13,512
Other Services, except Pub. Admin.	11,921	13,020	13,356	13,884	13,862	13,647	13,928	13,858	13,318	13,211
Manufacturing	12,059	12,021	12,177	12,863	13,436	13,821	13,955	13,312	11,203	11,239
Construction	10,916	11,268	11,356	12,473	13,989	14,355	14,190	12,515	10,529	9,934
Administrative and Waste Services	9,408	8,753	9,800	10,710	10,978	10,998	10,701	10,324	9,753	9,608
Finance and Insurance	7,425	7,408	7,250	7,223	7,311	7,705	8,329	8,419	8,446	8,325
Real Estate and Rental and Leasing	5,587	5,685	6,187	7,126	8,167	8,715	8,751	8,404	8,239	8,096
Farming	6,983	6,512	6,561	6,349	6,108	6,014	7,104	7,073	7,098	7,251
Federal Civilian	4,481	4,499	4,713	4,824	5,025	5,077	5,267	5,501	5,757	6,032
Transportation and Warehousing	3,877	4,888	5,315	5,028	4,720	5,117	5,270	5,824	5,280	5,410
Wholesale Trade	4,129	4,545	4,863	4,793	5,150	5,076	5,217	5,205	4,997	5,075
Arts, Entertainment and Recreation	3,221	3,124	3,233	3,484	3,654	3,752	4,034	4,271	4,317	4,264
Educational Services	2,785	3,067	3,238	3,344	3,518	3,574	3,410	3,756	3,835	3,946
Forestry, Fishing, Related Activities	3,120	2,824	2,559	3,302	2,886	3,000	2,900	2,783	3,301	3,427
Information	3,736	3,421	3,550	3,593	3,318	3,193	3,232	3,210	2,975	2,802
Federal Military	1,106	1,105	1,102	1,011	1,013	1,079	1,106	1,096	1,116	1,154
Utilities	481	592	282	268	905	840	905	970	1,059	1,032
Mining	214	220	365	240	269	271	321	371	528	599
Management	255	235	217	283	442	446	463	580	549	559

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties v1.3, U.S. Bureau of Economic Analysis Data

Illustration A-11a

Employment by Industry
North Central Florida Region
2001 to 2010



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

As shown in Tables A-11b and A-11c and Illustrations A-11b and A-11c, public sector employment in the region has declined from 2001 to 2010, both in real numbers and as a percentage of total employment. This trend is likely to continue as government budgets continue to be constrained due to sluggish state and national economies.

Table A-11b

Employment by Sector (Thousands)
North Central Florida Region and State
2001 to 2010

Sector	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Employment-Region	229	229	232	243	249	254	259	256	247	245
Total Employment-State	8,915	9,054	9,284	9,660	10,086	10,407	10,577	10,304	9,840	9,796
Private Sector Employment-Region	164	166	170	177	183	188	193	191	183	181
Private Sector Employment-State	7,803	7,929	8,143	8,499	8,909	9,211	9,363	9,085	8,636	8,588
Public Sector Employment-Region	65	63	61	66	66	66	66	64	64	64
Public Sector Employment-State	1,112	1,125	1,141	1,161	1,178	1,195	1,214	1,220	1,204	1,208

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties v1.3, U.S. Bureau of Economic Analysis Data

Table A-11c

Percent Employment by Sector
North Central Florida Region
2001 to 2010

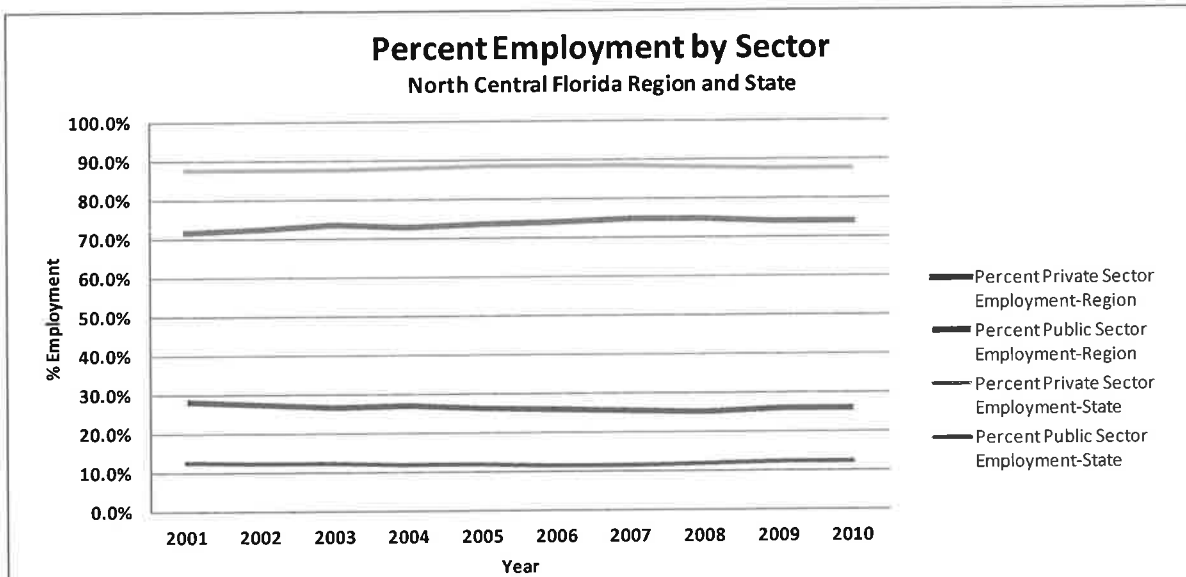
Sector	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Percent Private Sector Employment-Region	71.7%	72.5%	73.5%	73.0%	73.6%	74.0%	74.6%	74.9%	74.0%	74.0%
Percent Public Sector Employment-Region	28.3%	27.5%	26.5%	27.0%	26.4%	26.0%	25.4%	25.1%	26.0%	26.0%
Percent Private Sector Employment-State	87.5%	87.6%	87.7%	88.0%	88.3%	88.5%	88.5%	88.2%	87.8%	87.7%
Percent Public Sector Employment-State	12.5%	12.4%	12.3%	12.0%	11.7%	11.5%	11.5%	11.8%	12.2%	12.3%

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties v1.3, U.S. Bureau of Economic Analysis Data

Illustration A-11b demonstrates that over the 2001 to 2010 period, public sector employment as a percent of total employment in the region has declined from a high of over 28 percent down to 26 percent in 2010. Public Sector employment remains considerably higher in the region than in the state, due in large part to the concentration of public university and prison employment in the region, as well as a greater overall diversification in the regional and state economies.

Illustration A-11b

Percent Employment by Sector
North Central Florida Region and State
2001 to 2010



Source: Regional Economic Modeling, Inc., Policy Insite +, Florida Counties, v1.3, U.S. Bureeau of Economic Analysis Data

c. Wages by Industry

As shown in Table A-12a and Illustration A-12a, the majority of industries experienced stable wage growth from 2001 to 2010. Sixteen of the 23 industries measured had overall wage growth that met or exceeded the rate of inflation for the period. Industries that had the highest overall growth in average annual wages include Federal Military, Farm, Transportation and Warehousing, and State and Local Government. Only three industries, Mining, Management and Real Estate had overall declining average annual wages for the period.

Table A-12a

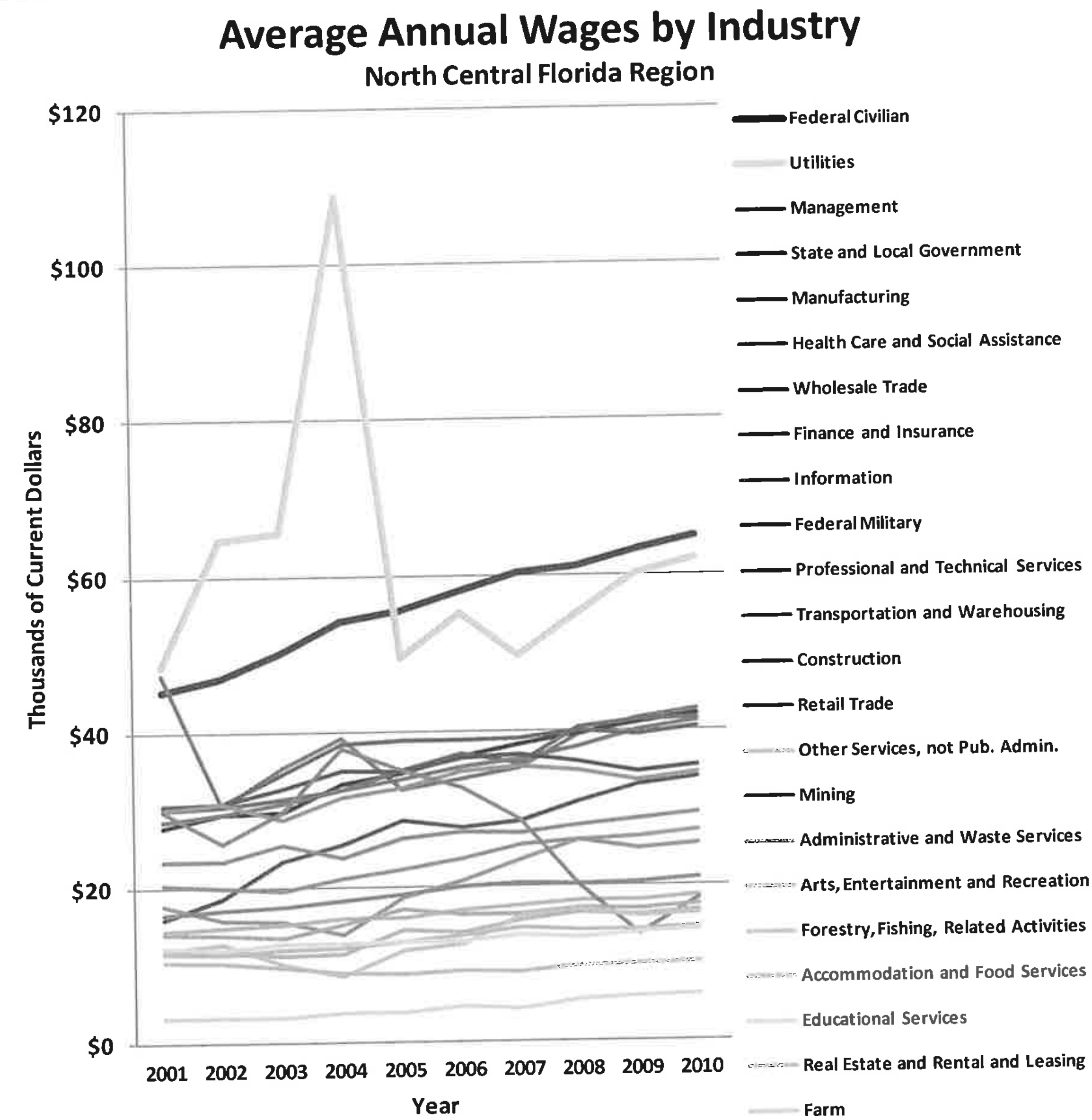
Average Annual Wages by Industry
North Central Florida Region
Thousands of Current Dollars
2001 to 2010

Industry	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Federal Civilian	$45.3	$46.9	$50.3	$54.2	$55.6	$57.9	$60.4	$61.1	$63.1	$64.8
Utilities	$48.5	$64.6	$65.7	$108.7	$49.5	$55.2	$49.6	$55.0	$60.2	$62.0
Management	$47.3	$30.5	$35.4	$39.2	$32.4	$33.8	$35.2	$39.3	$41.5	$42.6
State and Local Government	$27.8	$29.5	$29.7	$33.2	$34.7	$36.6	$38.2	$39.6	$40.9	$42.0
Manufacturing	$30.1	$30.4	$31.3	$32.4	$35.0	$37.1	$35.7	$40.4	$41.3	$41.5
Health Care and Social Assistance	$28.6	$29.5	$30.7	$32.6	$33.9	$35.3	$36.4	$37.9	$40.0	$41.1
Wholesale Trade	$30.7	$30.8	$34.6	$38.5	$38.8	$38.7	$39.0	$39.9	$39.3	$40.3
Finance and Insurance	$30.3	$30.8	$32.7	$34.9	$34.8	$36.5	$36.9	$35.9	$34.5	$35.5
Information	$30.1	$30.9	$28.7	$31.6	$32.8	$34.9	$35.4	$34.9	$33.5	$34.5
Federal Military	$16.1	$18.6	$23.4	$25.5	$28.6	$27.6	$28.4	$30.8	$33.0	$33.9
Professional and Technical Services	$23.4	$23.4	$25.4	$23.9	$26.3	$27.0	$26.9	$27.8	$28.5	$29.2
Transportation and Warehousing	$17.7	$15.7	$15.6	$13.9	$18.7	$20.8	$23.3	$25.9	$26.3	$27.0
Construction	$20.4	$19.9	$19.5	$21.2	$22.3	$23.6	$25.4	$25.9	$24.7	$25.3
Retail Trade	$16.6	$17.1	$17.6	$18.2	$19.1	$20.0	$20.3	$20.1	$20.4	$21.0
Other Services, not Pub. Admin.	$14.6	$14.9	$15.3	$16.0	$16.1	$16.9	$17.4	$18.1	$18.1	$18.6
Mining	$29.8	$25.7	$29.6	$37.8	$34.9	$32.8	$28.6	$20.0	$13.7	$18.3
Administrative and Waste Services	$14.1	$13.9	$13.4	$15.2	$17.1	$16.4	$16.4	$17.1	$17.0	$17.5
Arts, Entertainment and Recreation	$12.1	$11.6	$11.3	$11.5	$14.4	$14.2	$15.6	$16.6	$16.3	$16.7
Forestry, Fishing, Related Activities	$12.0	$12.8	$10.1	$8.7	$11.8	$12.5	$16.2	$17.0	$16.0	$16.4
Accommodation and Food Services	$11.5	$11.4	$12.0	$12.2	$13.0	$13.7	$14.7	$14.3	$14.4	$14.7
Educational Services	$12.3	$12.1	$12.7	$12.8	$13.0	$13.0	$13.7	$13.3	$13.9	$14.3
Real Estate and Rental and Leasing	$10.5	$10.3	$9.7	$9.0	$8.8	$9.1	$9.0	$9.7	$9.9	$10.2
Farm	$3.2	$3.3	$3.2	$3.7	$3.8	$4.6	$4.2	$5.4	$5.8	$6.0

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

Illustration A-12a

**Average Annual Wages by Industry
North Central Florida Region
Thousands of Current Dollars
2001 to 2010**



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

As shown in Table A-12b and Illustration A-12b, in both public as well as private sector employment, average annual wages in the region continue to lag those of the state. The gap between state and regional average annual wages did, however, narrow from 2001 to 2010 in both public and private sector employment.

Table A-12b

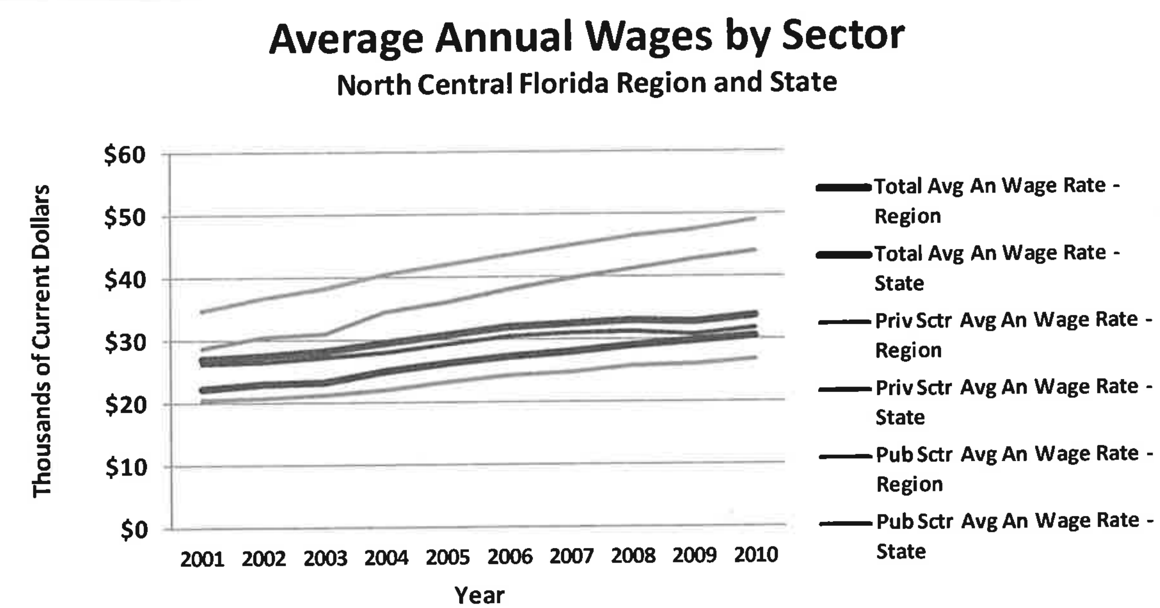
Average Annual Wages by Sector
North Central Florida Region and State
Thousands of Current Dollars
2001 to 2010

Sector	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Avg An Wage Rate - Region	$22.4	$23.0	$23.4	$25.0	$26.2	$27.4	$28.1	$29.1	$29.9	$30.6
Total Avg An Wage Rate - State	$27.1	$27.7	$28.4	$29.5	$30.7	$32.0	$32.5	$33.0	$32.8	$33.9
Priv Sctr Avg An Wage Rate - Region	$20.6	$20.8	$21.3	$22.1	$23.3	$24.3	$24.9	$25.8	$26.1	$26.7
Priv Sctr Avg An Wage Rate - State	$26.2	$26.6	$27.2	$28.2	$29.4	$30.6	$31.1	$31.4	$30.9	$31.9
Pub Sctr Avg An Wage Rate - Region	$28.8	$30.6	$31.1	$34.6	$36.2	$38.1	$39.8	$41.3	$42.7	$44.0
Pub Sctr Avg An Wage Rate - State	$34.8	$36.7	$38.4	$40.5	$42.0	$43.5	$45.2	$46.6	$47.7	$49.1

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

Illustration A-12b

Average Annual Wages by Sector
North Central Florida Region and State
Thousands of Current Dollars
2001 to 2010



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

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5. Civic & Governance Systems

Civic & Governance Systems:

"Markets need structure to deliver services and organize business."

Free markets need structure in place to deliver services, set rules that organize business and society, and provide vehicles for the public to engage in, influence, and change how society works. These include things such as constitutional integrity, ethics and elections, redundancy and government spending.

a. Millage Rates

As shown in Table A-13 and Illustration A-13, millage rates across the region shared a substantial downward trend from 2001 to 2007, due primarily to rising property value assessments. By 2008, however, effects of the national real estate crash had caused property values to decline rapidly, and millage rates across the region were raised accordingly as local governments adjusted millage rates to meet budgetary requirements.

Table A-13

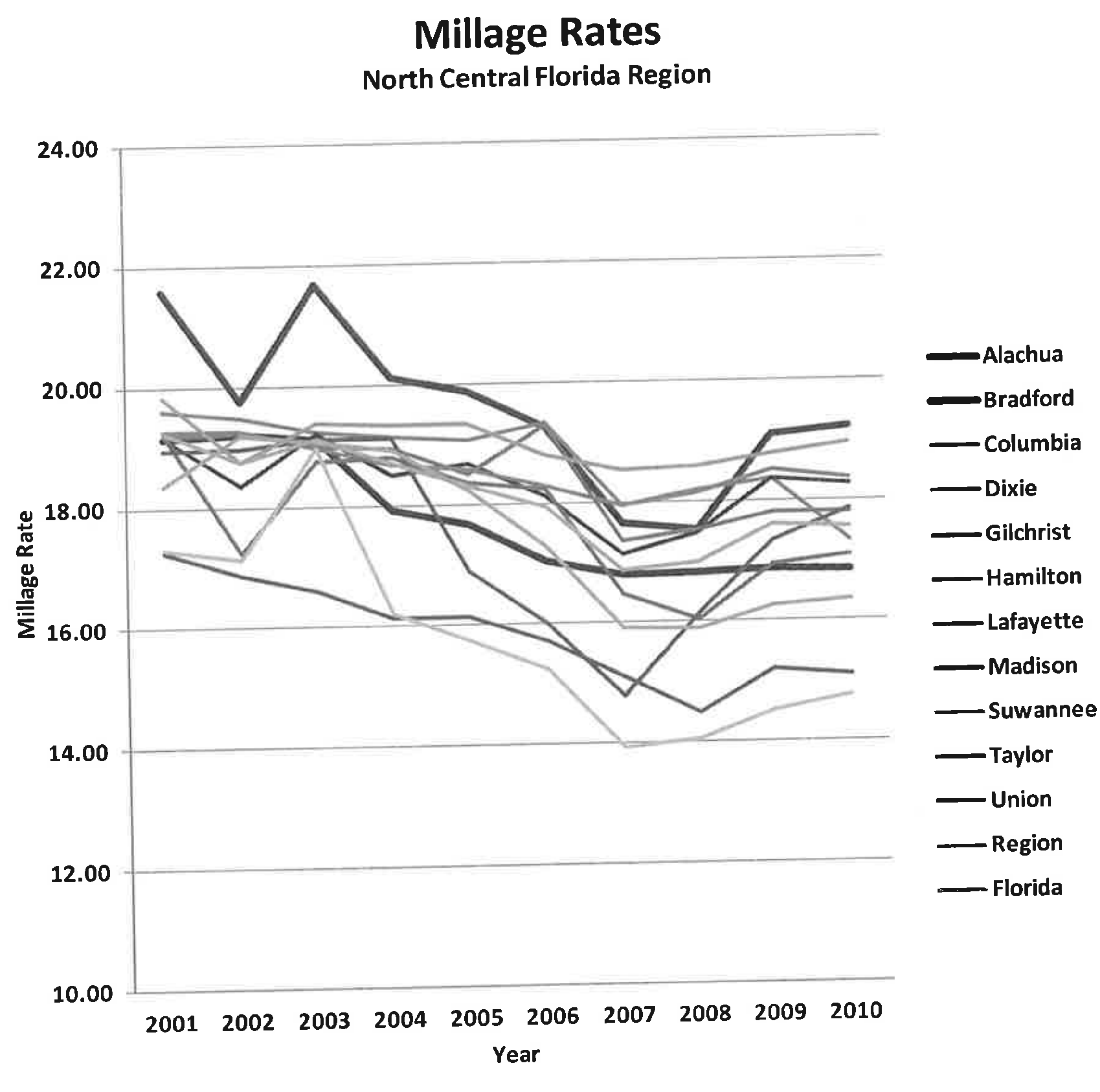
Millage Rates
North Central Florida Region and State
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	21.58	19.76	21.68	20.12	19.86	19.27	17.65	17.52	19.08	19.21
Bradford	19.14	19.21	19.12	17.93	17.67	17.05	16.80	16.81	16.86	16.85
Columbia	19.60	19.49	19.24	19.15	19.06	19.34	17.95	18.19	18.36	17.33
Dixie	19.15	18.35	19.22	18.50	18.68	18.11	17.14	17.47	18.35	18.25
Gilchrist	19.18	19.24	18.99	18.95	18.51	19.28	17.34	17.52	17.81	17.80
Hamilton	19.27	19.26	18.96	18.67	18.57	18.29	17.93	18.15	18.50	18.35
Lafayette	19.23	17.24	18.75	18.79	18.35	18.24	16.47	16.02	16.93	17.08
Madison	18.95	18.97	19.11	19.11	16.88	16.01	14.79	16.13	17.33	17.84
Suwannee	18.36	19.19	19.07	18.92	18.22	17.29	15.93	15.88	16.26	16.36
Taylor	17.26	16.87	16.61	16.14	16.14	15.73	15.11	14.51	15.20	15.12
Union	19.83	18.74	19.39	19.33	19.33	18.79	18.54	18.58	18.78	18.94
Region	19.23	18.76	19.10	18.69	18.30	17.95	16.88	16.98	17.59	17.56
Florida	17.31	17.12	18.96	16.20	15.75	15.25	13.93	14.05	14.53	14.77

Source: Florida Department of Revenue, Property Tax Analysis, Millage, Levies and Collections; Florida Ad Valorem Valuation and Tax Data 2001 to 2010; Millage and Taxes Levied Report <http://dor.myflorida.com/dor/property/resources/data.html>

Illustration A-13

Millage Rates
North Central Florida Region and State
2001 to 2010



Source: Florida Department of Revenue, Millage and Taxes Levied Report

b. Registered Nonprofit Organizations

As shown in Table A-14 and Illustration A-14, the number of registered public and private charities in the region has grown consistently over the 2001 to 2010 period. Each of the counties in the region experienced substantial increases in the total number of registered charities, and as a whole, the region experienced an increase of over 50 percent compared with over 70 percent for the state.

Table A-14

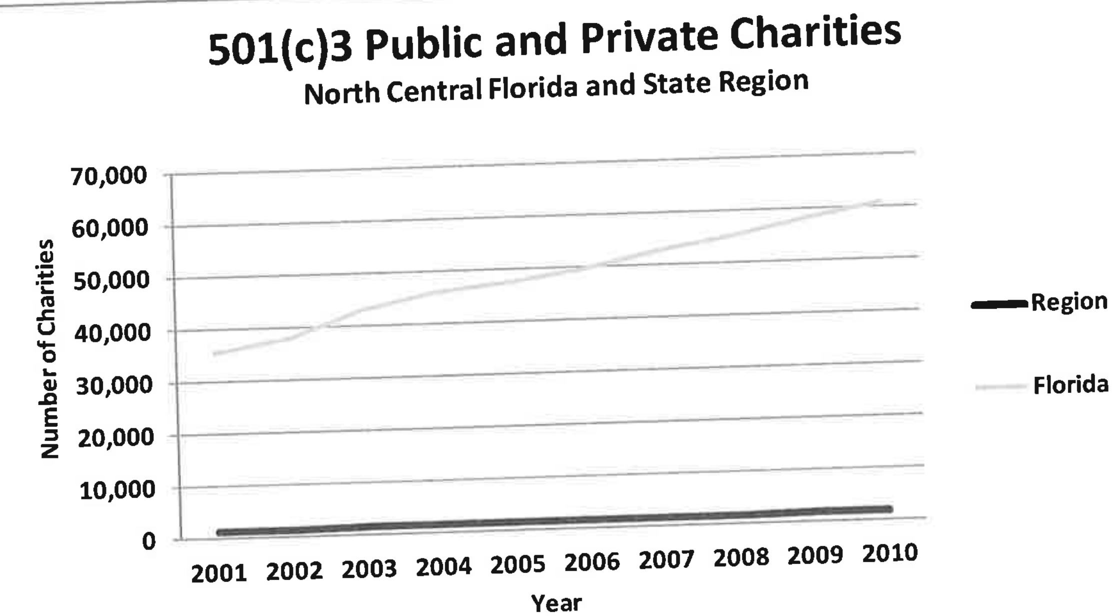
Registered 501(c)3 Organizations
Public and Private Foundation Charities
North Central Florida Region and State
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	842	891	972	1,023	1,047	1,091	1,137	1,135	1,219	1,266
Bradford	39	45	48	52	52	59	60	63	67	65
Columbia	118	124	143	156	163	170	172	182	192	200
Dixie	26	29	32	32	31	32	31	30	34	35
Gilchrist	31	32	34	36	37	38	39	40	43	48
Hamilton	26	24	32	34	35	34	33	36	36	38
Lafayette	16	14	19	19	19	20	22	25	26	29
Madison	42	40	54	56	58	57	61	66	67	74
Suwannee	78	81	100	104	107	109	110	110	109	115
Taylor	35	34	39	43	44	48	51	48	49	53
Union	17	22	31	29	29	29	30	26	31	32
Region	1,270	1,336	1,504	1,584	1,622	1,687	1,746	1,761	1,873	1,955
Florida	35,368	37,894	43,176	46,191	47,690	49,817	52,756	55,048	58,209	61,047

Source: Internal Revenue Service, Exempt Organizations Business Master File, (501(c)(3) Charities
The Urban Institute, National Center for Charitable Statistics, <http://nccsdataweb.urban.org/tablewiz/pc.php> ©2012

Illustration A-14

Registered 501(c)3 Organizations
Public and Private Foundation Charities
North Central Florida Region and State
2001 to 2010



Source: The Urban Institute, National Center for Charitable Statistics

c. Voter Participation

As shown in Table A-15 and Illustration A-15, voter participation in the region closely mirrored that of the state across the ten-year period from 2000 to 2010, with slightly greater regional participation in the 2004 election cycle and beyond. Voter participation was significantly greater during the presidential election cycle, and dropped off from 15 percent to 25 percent during non-presidential election years.

Table A-15

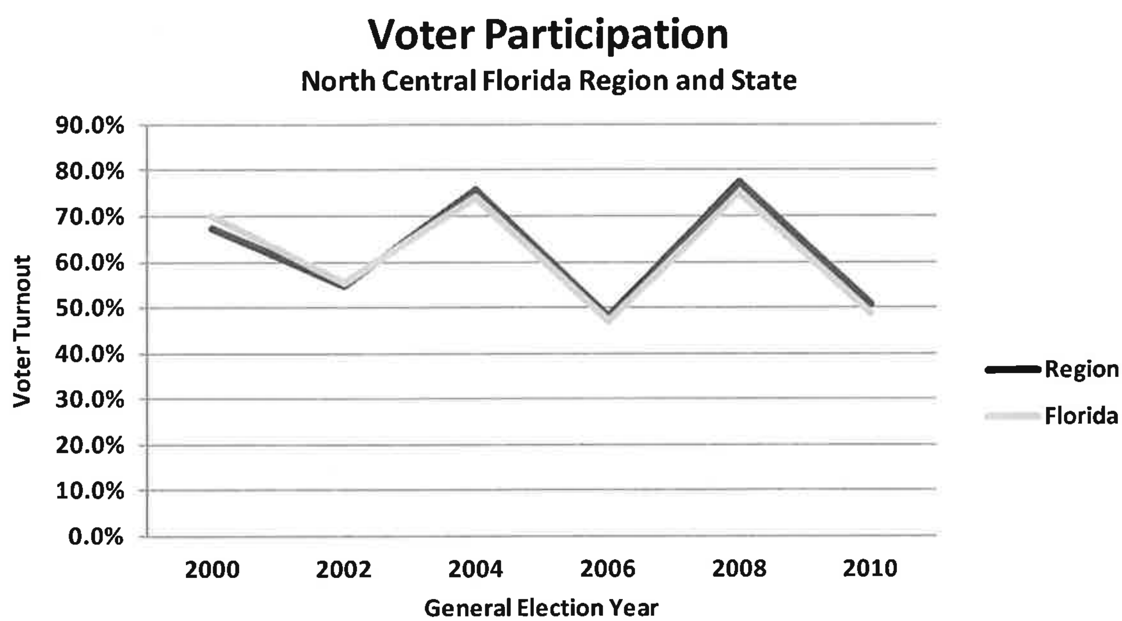
Voter Participation
North Central Florida Region and State
Biennial General Elections
2000 to 2010

Area	General Election Year					
	2000	2002	2004	2006	2008	2010
Alachua	71.3%	56.2%	78.4%	48.3%	81.7%	49.4%
Bradford	69.5%	57.4%	74.2%	50.7%	74.9%	51.8%
Columbia	61.7%	51.2%	73.2%	43.5%	74.1%	48.1%
Dixie	47.6%	44.1%	66.9%	48.9%	68.5%	53.5%
Gilchrist	82.7%	62.6%	78.0%	56.4%	73.4%	50.5%
Hamilton	62.7%	45.6%	67.1%	45.6%	73.5%	51.6%
Lafayette	66.4%	61.6%	77.8%	51.0%	76.4%	58.1%
Madison	64.0%	55.8%	73.4%	52.3%	73.0%	55.5%
Suwannee	64.0%	54.2%	72.4%	47.0%	71.8%	54.7%
Taylor	60.2%	52.9%	75.0%	45.2%	72.2%	52.4%
Union	60.5%	55.3%	66.7%	45.4%	73.7%	52.3%
Region	67.1%	54.8%	75.6%	47.9%	77.5%	50.6%
Florida	70.1%	55.3%	74.2%	46.8%	75.2%	48.7%

Source: Florida Department of State, Division of Elections
<https://doe.dos.state.fl.us/elections/resultsarchive/Index.asp?ElectionDate=11/2/2004&DATAMODE=>

Illustration A-15

Voter Participation
North Central Florida Region and State
Biennial General Elections
2000 to 2010



Source: Florida Department of State, Division of Elections

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6. Quality of Life & Quality Places

Quality of Life & Quality Places:
"The future economy of the region depends on preservation and enhancement of quality of life."

Economic and urban theorist Richard Florida underscores the importance of place as an integral component of prosperity. He documents the shift from generations that once chased the job and landed by coincidence in a particular city, to the current cohort that selects geography first and then lands the job. The future economy of the region depends on the preservation and enhancements of a wide range of integrated elements that together express the robustness of our culture and the positive perceptions of those things that make us healthy, safe, comfortable and secure.

a. Per Capita Income

As shown in Table A-16 and Illustration A-16, per capita incomes in the region grew across all counties from 2001 to 2010. Eight of the 11 counties in the region experienced double digit rates of increase over the time period, and the region as a whole had a higher rate of per capita income growth than the state. However, the gap between state and regional per capita incomes remained virtually unchanged from 2001 to 2010.

Table A-16

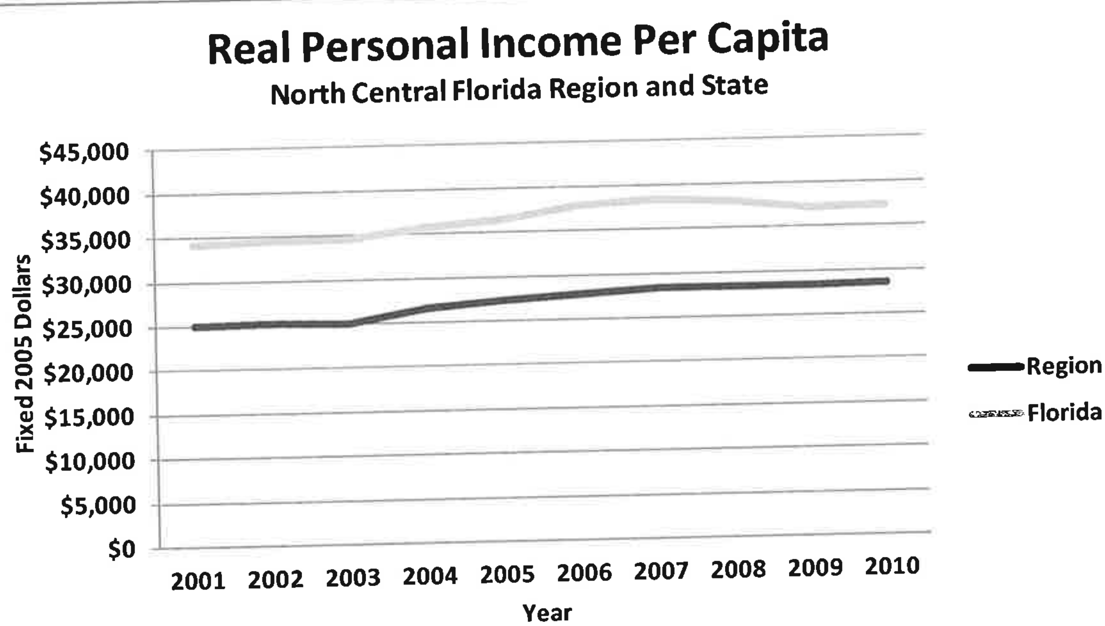
Real Personal Per Capita Income
North Central Florida Region and State
Fixed 2005 Dollars
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	$28,684	$28,794	$28,716	$31,172	$32,182	$32,776	$33,281	$33,353	$32,933	$33,177
Bradford	$22,747	$23,310	$23,131	$23,839	$24,319	$24,848	$25,369	$25,332	$25,569	$25,728
Columbia	$22,333	$22,463	$22,006	$23,210	$23,610	$23,345	$24,257	$24,045	$24,305	$24,314
Dixie	$18,539	$18,438	$18,523	$19,215	$19,885	$19,786	$19,873	$20,246	$20,414	$21,265
Gilchrist	$25,217	$24,659	$24,248	$26,028	$25,797	$26,727	$27,064	$27,294	$27,439	$27,936
Hamilton	$14,825	$14,348	$15,190	$15,263	$17,087	$17,134	$17,528	$17,946	$18,258	$17,872
Lafayette	$17,680	$15,807	$16,916	$18,570	$16,193	$15,349	$17,459	$17,827	$17,993	$18,675
Madison	$20,360	$20,274	$20,152	$21,229	$21,764	$21,673	$21,979	$22,328	$22,564	$23,108
Suwannee	$24,068	$23,894	$23,089	$24,296	$24,814	$25,219	$26,042	$26,216	$26,183	$26,381
Taylor	$21,173	$21,392	$20,866	$22,137	$22,873	$23,135	$23,539	$23,793	$23,890	$24,137
Union	$16,302	$16,448	$17,217	$16,832	$17,656	$18,161	$17,063	$17,061	$18,069	$18,271
Region	$25,031	$25,081	$24,928	$26,635	$27,356	$27,723	$28,250	$28,327	$28,249	$28,447
Florida	$34,195	$34,509	$34,416	$35,708	$36,408	$37,905	$38,413	$38,016	$37,063	$37,235

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

Illustration A-16

**Real Personal Per Capita Income
North Central Florida Region and State
Fixed 2005 Dollars
2001 to 2010**



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

b. House Price Cost Index

As shown in Table A-17 and Illustration A-17, housing prices in the region as well as the state remained a bargain relative to national average home prices. With the exception of Alachua County, the relative cost of a home in the region was less than one-half that of the nation and significantly less than other areas of the state. From 2001 to 2010, the region as a whole rose slightly relative to the nation, while the overall relative prices of the state fell slightly by 2010.

Table A-17

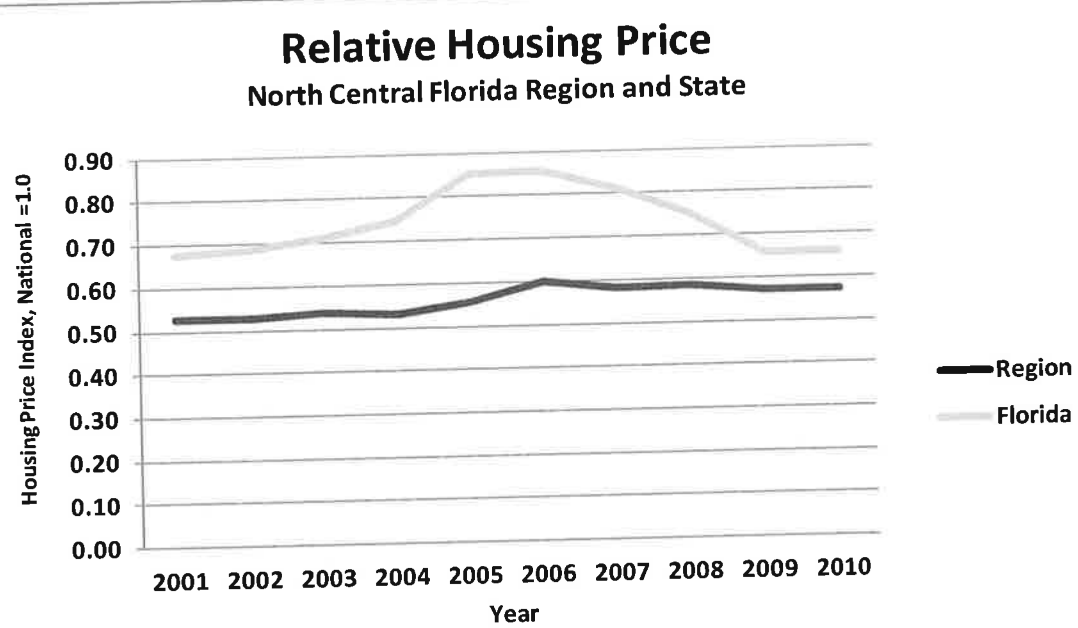
Relative Housing Price
North Central Florida Region and State
National Index = 1.0
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	0.60	0.60	0.61	0.58	0.59	0.65	0.65	0.68	0.67	0.67
Bradford	0.44	0.43	0.44	0.42	0.43	0.47	0.47	0.49	0.49	0.49
Columbia	0.45	0.46	0.47	0.49	0.55	0.57	0.52	0.48	0.44	0.45
Dixie	0.40	0.40	0.41	0.43	0.48	0.50	0.46	0.42	0.39	0.39
Gilchrist	0.44	0.44	0.45	0.47	0.53	0.55	0.50	0.46	0.43	0.43
Hamilton	0.49	0.49	0.50	0.52	0.59	0.61	0.56	0.51	0.47	0.47
Lafayette	0.50	0.50	0.51	0.54	0.60	0.62	0.57	0.53	0.49	0.49
Madison	0.36	0.36	0.37	0.38	0.43	0.45	0.41	0.38	0.35	0.35
Suwannee	0.41	0.42	0.43	0.45	0.50	0.52	0.48	0.44	0.40	0.41
Taylor	0.39	0.39	0.40	0.41	0.47	0.48	0.44	0.41	0.38	0.38
Union	0.40	0.40	0.41	0.43	0.48	0.50	0.46	0.42	0.39	0.39
Region	0.53	0.53	0.54	0.53	0.56	0.60	0.58	0.58	0.57	0.57
Florida	0.68	0.69	0.71	0.75	0.85	0.86	0.81	0.75	0.66	0.66

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

Illustration A-17

Relative Housing Price
North Central Florida Region and State
National Index = 1.0
2001 to 2010



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

c. Persons Living in Poverty

As shown in Table A-18 and Illustration A-18, the percentage of persons living in poverty in the region increased over the 2001 to 2010 period. The gap between the region and state also increased over the period, from 4.4 percent in 2001 to 7.1 percent in 2010. The largest increases in poverty rates in the region occurred in 2005, indicating that the collapse of the national housing market had a significant negative impact on the economy of the region.

Table A-18

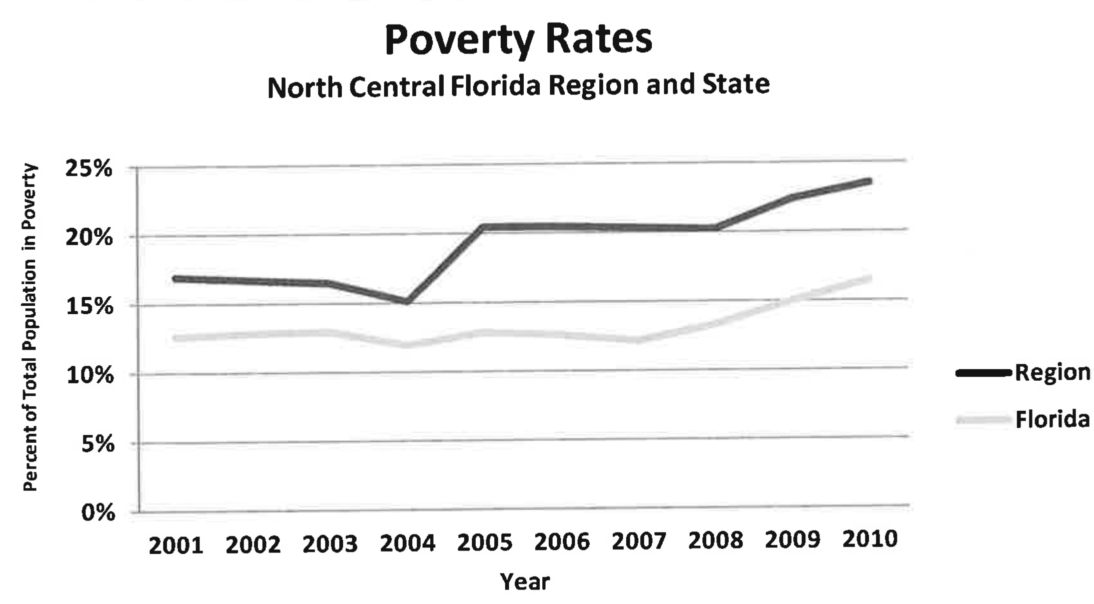
Percent of Persons Living in Poverty
North Central Florida Region and State
2001 to 2010

Area	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Alachua	15.1%	15.1%	16.2%	14.5%	21.8%	21.8%	22.8%	20.0%	23.0%	25.3%
Bradford	18.2%	17.8%	16.2%	14.8%	15.9%	16.3%	16.9%	19.3%	22.5%	19.4%
Columbia	17.2%	17.2%	15.7%	14.1%	19.0%	18.2%	13.9%	18.0%	19.1%	19.5%
Dixie	21.9%	20.8%	18.8%	18.0%	24.0%	22.6%	21.6%	22.8%	23.7%	26.6%
Gilchrist	17.5%	16.6%	14.2%	13.0%	13.7%	17.6%	15.4%	16.8%	18.0%	21.0%
Hamilton	26.2%	25.3%	22.0%	20.9%	26.6%	24.3%	27.7%	29.3%	28.5%	30.8%
Lafayette	23.5%	23.3%	19.0%	18.6%	23.6%	22.3%	22.0%	25.6%	24.6%	26.0%
Madison	20.5%	19.8%	18.5%	17.7%	23.8%	20.9%	21.0%	23.6%	26.2%	23.4%
Suwannee	17.5%	16.9%	16.5%	15.3%	17.5%	18.1%	17.8%	19.9%	19.7%	20.9%
Taylor	18.1%	17.3%	16.9%	15.9%	18.4%	20.6%	18.5%	22.9%	23.8%	20.6%
Union	21.4%	21.3%	18.1%	18.2%	20.3%	19.4%	21.5%	23.6%	26.5%	24.3%
Region	17.0%	16.7%	16.5%	15.1%	20.5%	20.4%	20.3%	20.3%	22.4%	23.6%
Florida	12.6%	12.8%	13.0%	11.9%	12.8%	12.6%	12.1%	13.3%	15.0%	16.5%

Source: U.S. Department of Commerce, Census Bureau, <http://www.census.gov/>

Illustration A-18

**Percent of Persons Living in Poverty
North Central Florida Region and State
2001 to 2010**



Source: U.S. Department of Commerce, Census Bureau

7. Shift-Share Analysis

Shift share analysis is used to examine employment changes over time in the growth or decline of employment by specific industries in a region. To understand these changes, the analysis breaks employment changes into three categories: **Share Change; Mix Change**; and **Shift Change**.

- **Share Change** is the employment change due to general growth or decline in the national economy, comparing the overall employment growth rate of the region to the growth rate of the nation.
- **Mix Change** is the portion of employment change attributed to the growth of the specific industry, and measures the difference in the industry employment growth in the region compared to the industry growth that would have occurred as a result of the national employment growth rate for that industry.
- **Shift Change** is the competitiveness of the region and measures the difference between the regional industry change in employment compared to the employment change had employment within the industries of the region grown at the rate of the nation.

The shift-share equation is as follows:

$$e_i^{t+n} - e_i^t = share\ change + mix\ change + shift\ change$$

Or;

$$e_i^{t+n} - e_i^t = e_i^t\left[\frac{E^{t+n}}{E^t} - 1\right] + e_i^t\left[\frac{E_i^{t+n}}{E_i^t} - \frac{E^{t+n}}{E^t}\right] + e_i^t\left[\frac{e_i^{t+n}}{e_i^t} - \frac{E_i^{t+n}}{E_i^t}\right]$$

Where:

e = regional employment E = national employment t = base year

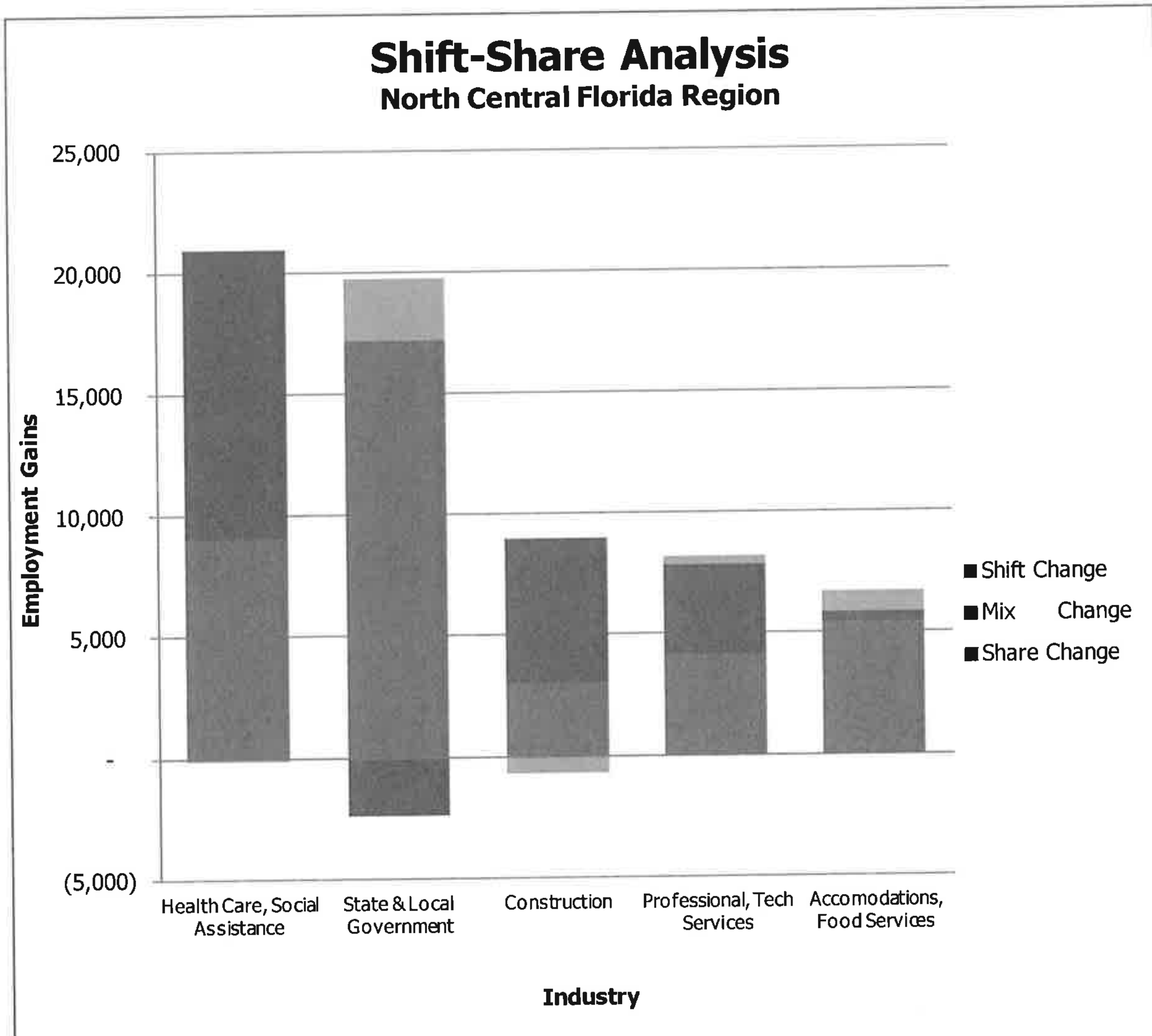
n = the number of years i = specific industry

Illustration A-19 demonstrates the components of the estimated employment gains in the top five industries in the north central Florida region from 2010 to 2030 based upon the Shift-Share analysis.

As shown in Illustration A-19, the largest projected employment gains are anticipated be in Health Care, State and Local Government, Construction, Professional Services and Accommodations and Food Services. The combined employment gains in these five industries are projected to exceed 60,000 new jobs in the region by 2030, which accounts for 73 percent of the total anticipated employment gains.

Illustration A-19

Shift-Share Analysis
North Central Florida Region
Top Five Projected Industry Employment Gains
2010 to 2030



Source: Regional Economic Modeling, Inc. , Policy Insite +, Florida Counties, v1.3

Table A-19 lists the 22 industry sectors measured and the components of estimated employment change for each industry, ranked from highest to lowest projected gain. The Health Care and Social Assistance industry is anticipated to have the highest employment gains in the region, due primarily to growth of the industry at the national level. State & Local Government is also anticipated to have substantial growth over the period, due primarily to growth in the national economy and a local competitive advantage.

Table A-19

Shift-Share Analysis
North Central Florida Region
Top 10 Projected Industry Employment Gains
2010 to 2030

Industry	2010 to 2030			
	Share Change	Mix Change	Shift Change	Shift-Share Change
Health Care, Social Assistance	9,044	11,928	(114)	20,858
State & Local Government	17,193	(2,428)	2,506	17,271
Construction	3,031	5,931	(711)	8,251
Professional, Technical Services	4,124	3,739	322	8,185
Accommodations, Food Services	5,437	419	833	6,689
Other Services (excluding Government)	4,031	1,447	876	6,354
Retail Trade	7,752	(5,661)	1,471	3,562
Administration, Waste Services	2,933	774	(535)	3,173
Real Estate, Rental, Leasing	2,471	78	485	3,034
Finance, Insurance	2,540	(877)	1,177	2,840
Educational Services	1,204	716	(44)	1,876
Arts, Entertainment, Recreation	1,301	146	266	1,714
Transportation, Warehousing	1,651	(189)	139	1,601
Wholesale Trade	1,550	(1,420)	226	355
Forestry, Fishing, Related Activities	1,044	(785)	63	323
Mining	183	(125)	264	322
Information	855	(781)	42	116
Management of Companies/Enterprises	171	(138)	(2)	30
Utilities	314	(543)	163	(65)
Federal Military	352	(449)	(0)	(97)
Federal Civilian	1,841	(2,465)	0	(623)
Manufacturing	3,432	(6,537)	1,446	(1,659)
Total:	72,454	2,782	8,874	84,110

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

a. Share Change - Change of Industry Due to National Growth

As shown in Table A-20, Share Change, which is a measure of how much of the growth of an industry is attributable to movement in the national economy, is the primary growth factor for industries in the region. State and Local Government, followed by Health Care and Retail Trade are the industries projected to experience the highest growth and comprise nearly one-half of all employment gains in the share change category.

Table A-20

Employment Share Change
North Central Florida Region
2010 to 2030

Industry	2010 to 2030 Share Change
State & Local Government	17,193
Health Care, Social Assistance	9,044
Retail Trade	7,752
Accommodations, Food Services	5,437
Professional, Technical Services	4,124
Other Services (excluding Government)	4,031
Manufacturing	3,432
Construction	3,031
Administration, Waste Services	2,933
Finance, Insurance	2,540
Real Estate, Rental, Leasing	2,471
Federal Civilian	1,841
Transportation, Warehousing	1,651
Wholesale Trade	1,550
Arts, Entertainment, Recreation	1,301
Educational Services	1,204
Forestry, Fishing, Related Activities	1,044
Information	855
Federal Military	352
Utilities	314
Mining	183
Management of Companies/Enterprises	171
Total:	72,454

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

b. Mix Change - Actual Industry Growth

As shown in Table A-21, Mix Change, which represents the share of regional industry growth attributed to the growth of the industry at the national level, accounts for much less of the overall employment growth of the region. The Health Care industry, however, is expected to demonstrate strong growth as the baby boom generation continues to age, and those expectations are reflected in significant regional growth projections. Manufacturing is expected to continue to decline over the time period.

Table A-21

Employment Mix Change
North Central Florida Region
2010 to 2030

Industry	2010 to 2030
	Mix Change
Health Care, Social Asst	11,928
Construction	5,931
Professional, Technical Services	3,739
Other Services (excluding Government)	1,447
Administration, Waste Services	774
Educational Services	716
Accommodations, Food Services	419
Arts, Entertainment, Recreation	146
Real Estate, Rental, Leasing	78
Mining	(125)
Management of Companies/Enterprises	(138)
Transportation, Warehousing	(189)
Federal Military	(449)
Utilities	(543)
Information	(781)
Forestry, Fishing, Related Activities	(785)
Finance, Insurance	(877)
Wholesale Trade	(1,420)
State & Local Government	(2,428)
Federal Civilian	(2,465)
Retail Trade	(5,661)
Manufacturing	(6,537)
Total:	2,782

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

c. Shift Change - Regional Competitiveness

As shown in Table A-22, Shift Change is the component of employment growth that measures the competitive advantage that a region possesses in a specific industry and for that reason is often considered the most important component of the three. In the analysis of the region, by far the most apparent competitive advantage is in State and Local Government, due to the University of Florida located in Gainesville, and numerous state prisons located throughout the region. In addition, the Manufacturing industry in the region shows a significant projected competitive advantage over national trends. This advantage may be the result of the concentration of high-tech business incubators in the region, which are fostering a rise in local manufacturing enterprises.

Table A-22

Employment Shift Change
North Central Florida Region
2010 to 2030

Industry	2010 to 2030 Shift Change
State & Local Government	2,506
Retail Trade	1,471
Manufacturing	1,446
Finance, Insurance	1,177
Other Services (excluding Government)	876
Accommodations, Food Services	833
Real Estate, Rental, Leasing	485
Professional, Technical Services	322
Arts, Entertainment, Recreation	266
Mining	264
Wholesale Trade	226
Utilities	163
Transportation, Warehousing	139
Forestry, Fishing, Related Activities	63
Information	42
Federal Civilian	0
Federal Military	(0)
Management of Companies/Enterprises	(2)
Educational Services	(44)
Health Care, Social Assistance	(114)
Administration, Waste Services	(535)
Construction	(711)
Total:	8,874

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

d. Location Quotient Analysis

Location Quotient Analysis uses industry employment to determine whether that industry is basic or non-basic relative to national employment norms. The underlying concept is that if a local industry has a higher concentration of workers than the concentration of workers at the national level, then that industry is "basic" in nature, producing more goods and services than the local market can consume. The excess production is then exported outside the region, bringing new money into the local economy. If an industry has an equal or lower concentration than national levels, then likewise, that industry is assumed to be producing primarily for local markets only.

The location quotient equation is as follows:

$$LQ = \frac{e_i \ /e}{E_i \ /E}$$

Where:

e_i = Local employment in industry i e_i = Total local employment

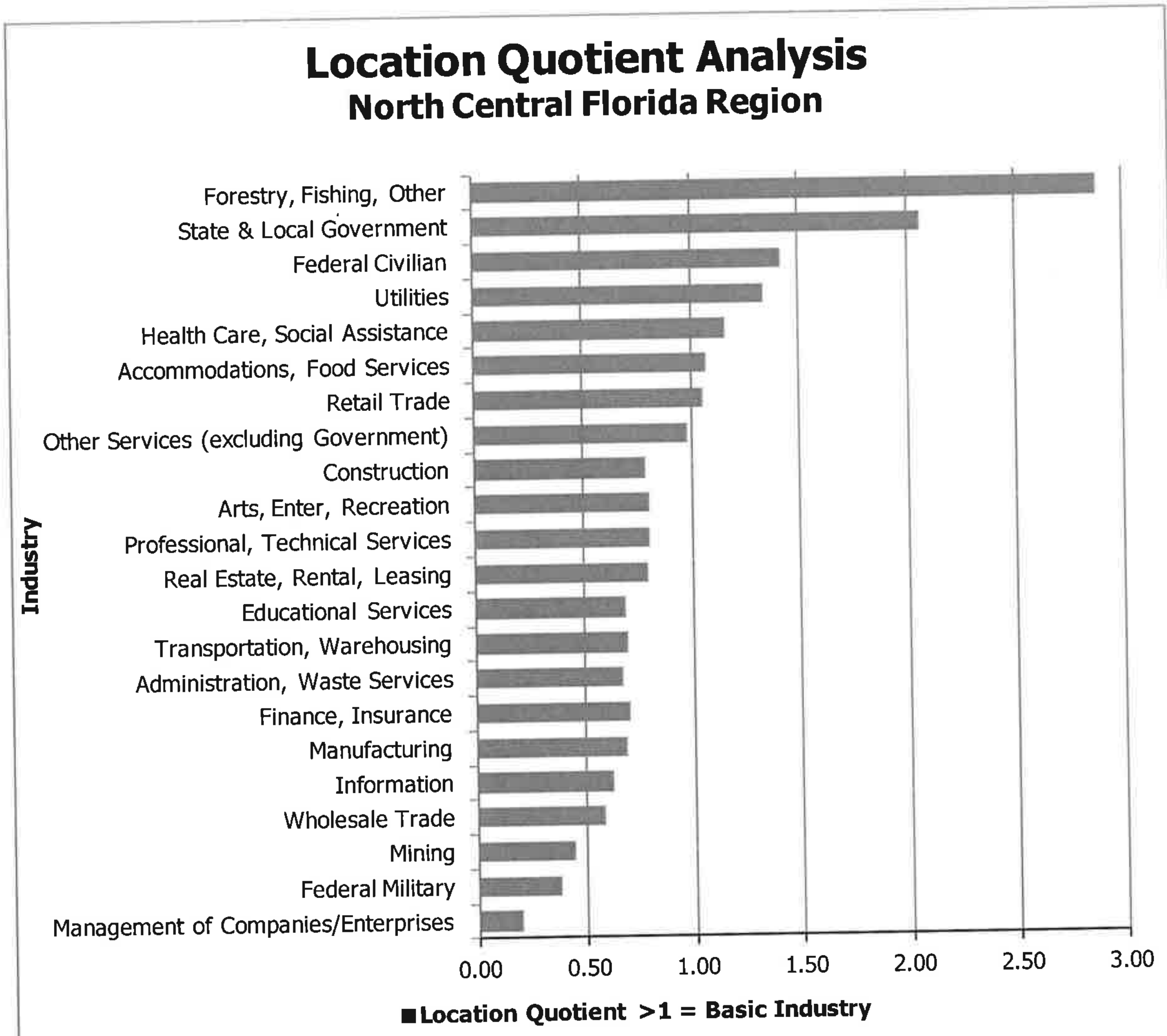
E_i = Reference area employment in industry i E_i = Total reference area employment

Industries with a ratio greater than or equal to 1.0 are considered basic industries, while those with a ratio less than 1.0 are assumed to be non-basic.

Illustration A-20 provides a breakdown of the basic and non-basic industries in the region. Seven industries in the region have a location quotient greater than one: Forestry and Fishing, State and Local Government, Federal Civilian Government, Utilities, Healthcare, Accommodations and Food Services and Retail Trade. The high concentration of employment in the Forestry and Fishing industry reflects the abundant timber lands in the region. Employees of the University of Florida are state employees, and the University "exports" the vast majority of the educational goods and services it produces to communities outside the area. In addition, there is a considerable concentration of state prisons in the region which provide services to the surrounding areas of the state. Therefore, State and Local Government is considered a basic industry for the region.

Illustration A-20

**Location Quotient Analysis
North Central Florida Region
2010**



Source: Regional Economic Modeling, Inc., Policy Insite +, Florida Counties v1.3

As shown in Table A-23, the relative concentrations of industries in the region as compared with the nation and a projection of future concentrations based upon population projections through 2030. The industries are ranked highest to lowest by their location quotient scores in 2010. The table demonstrates the strength of each industry relative to national concentrations, with a score of 1.0 equaling the national average concentration.

Table A-23

Location Quotient Analysis
North Central Florida Region
2010 to 2030

Industry	Year				
	2010	2015	2020	2025	2030
Forestry, Fishing, Related Activities	2.82	2.88	2.80	2.77	2.77
State & Local Government	2.07	2.06	2.15	2.17	2.07
Federal Civilian	1.43	1.43	1.42	1.35	1.38
Utilities	1.26	1.34	1.38	1.42	1.47
Health Care, Social Assistance	1.16	1.16	1.12	1.11	1.11
Accommodations, Food Services	1.06	1.07	1.05	1.06	1.06
Retail Trade	1.03	1.05	1.04	1.04	1.05
Other Services (excluding Government)	0.96	0.98	0.97	0.97	0.97
Construction	0.81	0.78	0.78	0.76	0.75
Arts, Entertainment, Recreation	0.80	0.81	0.79	0.80	0.81
Professional, Technical Services	0.79	0.80	0.79	0.78	0.78
Real Estate, Rental, Leasing	0.78	0.79	0.78	0.79	0.79
Educational Services	0.70	0.69	0.67	0.66	0.67
Transportation, Warehousing	0.69	0.70	0.68	0.68	0.68
Administration, Waste Services	0.69	0.67	0.66	0.65	0.64
Finance, Insurance	0.65	0.71	0.71	0.70	0.70
Manufacturing	0.65	0.69	0.72	0.72	0.73
Information	0.62	0.62	0.61	0.61	0.61
Wholesale Trade	0.57	0.58	0.58	0.58	0.58
Mining	0.39	0.44	0.48	0.55	0.53
Federal Military	0.38	0.38	0.37	0.35	0.37
Management of Companies/Enterprises	0.20	0.20	0.19	0.19	0.19

Source: Regional Economic Modeling, Inc., Policy Insite +, Florida Counties v1.3

As previously noted, the region has a high concentration of Forestry workers as well as State and Local Government employees. Projections of future employment indicate that most of the industries in the region will remain at or close to their current levels of concentration for the foreseeable future. As the population of the region grows and the economy diversifies, there should be a gradual trend towards employment concentrations equal to national averages across a broader spectrum of industries.

8. Regional Economic Clusters

A regional Targeted Industry study was conducted as part of the Rural Economic Development Catalyst Project led by the State of Florida's public-private partnership, Enterprise Florida, Inc., to identify those industries with the greatest potential for creating high value-added jobs, capital investment, and economic benefits in the region. These industries are either currently expanding or have potential for high-wage job growth.

a. Logistics & Distribution

The logistics and distribution sector is growing in the region and totaled nearly 15,000 jobs in 2010. The number of jobs in logistics and distribution in the region surged by 54 percent between 1995 and 2005, well above the national growth rate of nine percent. Despite this strong growth, the industry is still considered under-represented compared to national average employment, as the share of industry employment remains about one-third below that of the nation. The combination of a strong growth rate and room for expansion in the industry is a positive indicator for future economic opportunities in this sector. In addition, the development of the North Florida Intermodal Park in Columbia County will provide direct access to the deep water port in Jacksonville with increased activity from the completion of the Panama Canal expansion in 2014.

b. Building Component Design and Manufacturing

While the Building Component Design and Manufacturing industry has declined across the nation, prior to the national economic downturn it experienced significant growth in the region as manufacturers of building components expanded in the region to meet the demands of the fast growing Florida market. Between 1995 and 2005, the number of building component jobs in the region increased by 28 percent. The strength of the region in wood products and fabricated metals, two key components of the building component design and manufacturing sector, are anticipated to make this a growth industry in the region once slumping national housing markets begin to rebound.

c. Aviation Services and Products

The region possesses a national caliber aviation services industry due to the presence of a major maintenance, repair and overhaul company, TIMCO, headquartered in Lake City (Columbia County). They service military transport planes, commercial jetliners and private aircraft. Customers have included the U.S. Coast Guard, Delta and United Airlines, as well as overseas companies. The aviation maintenance, repair and overhaul industry is anticipated to continue to grow considerably for several years, and should provide additional growth opportunities for the region. Other fast growing segments of the aviation market, such as Very Light Jets, will give the region an opportunity to expand in aircraft parts manufacturing as well building on its momentum in the maintenance, repair and overhaul segment.

d. Bio-fuels and Renewable Energy

Facing growing energy demands and dwindling supplies of conventional fuel sources, alternative sources of energy are being pursued for both power generation and automotive needs. The development of alternative fuels, including biofuels such as ethanol, has become a priority. United States automakers have modified vehicle engines so they can now run on a mixture of gasoline and ethanol. In response, corn production has increased significantly and a number of biorefineries have been constructed around the country. A refinery in the region could serve Florida and Southeastern U.S. markets, and could utilize local agricultural and forestry waste cellulose products to produce ethanol. Due to its extensive forestry resources, the region is also well positioned to take advantage of rapidly growing demand in the European market for wood pellets to fuel power generation plants.

e. Healthcare Services and Products

Healthcare services and products remains one of the fastest growing employment sectors in the United States, due in large part to the aging domestic population and the position as the global leader in healthcare technology development. Nationally, the number of jobs in these fields increased by over 21 percent between 2000 and 2010, while in the region the growth rate of the industry was nearly 17 percent, which equates to approximately 18,700 jobs. Due to the broad range of skills levels in the Healthcare Services and Product industry, wage levels vary greatly. However, overall average wages for the industry are still higher than most regional industry averages. The region is also home to the Sid Martin Biotechnology Business Incubator, which continues to launch successful healthcare start-up companies, and should provide the basis for additional healthcare industry employment opportunities.

9. State and Local Economic Development Plans and Programs Affecting the Region

Several economic development plans and programs being conducted in the region will have an impact on the Comprehensive Economic Development Strategy and the overall regional economy. Effective collaboration between state, regional and local plans is vital to the success of the regional economy. Below are descriptions of some of the key economic development programs that will affect the region.

a. Rural Economic Development Catalyst Project

Enterprise Florida, Inc. has implemented an ongoing rural strategic marketing program for three areas in the state identified as Rural Areas of Critical Economic Concern. The project is designed to use catalyst sites to attract industries with large numbers of high value-added jobs and capital investment that will have a positive ripple effect throughout the region. Ten of the 11 counties in the North Central Florida Economic Development District are also located within the 14-county North Central Rural Area of Critical Economic Concern. Due to the large geographic area covered by the region, two counties, Columbia and Suwannee, were selected to host catalyst sites. The North Florida Economic Development Partnership was formed to oversee the Catalyst Sites project and to implement economic development programs for the North Central Florida Rural Area of Critical Economic Concern. The Partnership is comprised of local economic developers, county commissioners, workforce development boards, regional planning councils and private businesses.

The 500-acre Columbia County site is part of the North Florida Intermodal Park, a master planned site owned by Plum Creek, and part of the Port of Jacksonville Foreign Trade Zone. The North Florida Intermodal Park will be an inland port designed to move freight efficiently between trains and trucks, and is positioned in close proximity to the Interstate 10 and 75 corridors, as well as the Lake City Gateway Airport.

The Suwannee County catalyst site is also approximately 500 acres and is located at the intersection of Interstate 10 and U.S. Highway 90 northwest of Live Oak. Initial engineering studies have been completed on the site and it is currently under development in preparation for anticipated economic development projects.

b. Florida Strategic Plan for Economic Development

The Florida Department of Economic Opportunity has developed the Florida Five-Year Strategic Plan for Economic Development based on the Florida Chamber Foundation's Six Pillars of Florida's Future Economy concept. The strategy was developed as a collaborative effort with input from a series of 14 forums held throughout the state, which had extensive participation from private, public and civic sector stakeholders. In total, over 1,200 stakeholders participated in the process.

The table below is the, "at-a-glance," version of the state five-year economic development plan.

Florida Strategic Plan for Economic Development
July 2012 – June 2017 *(V16, www.floridajobs.org/FL5yrPlan)*

At-A-Glance

Vision
- Florida will have the nation's top performing economy and be recognized as the world's best place to live, learn, work and do business.

Goals
- Lead the nation in global competitiveness as a location for business, investment, talent, innovation and visitors.
- Lead the nation in economic growth and prosperity.
- Lead the nation in quality of life.

Objectives
- Improve employment in Florida.
- Expand global commerce.
- Foster opportunities for prosperity.
- Increase Florida's attractiveness to workers, residents and visitors.
- Grow businesses.

Cross-Cutting Strategies

1. **Strengthen collaboration and alignment among state, regional and local entities toward the state's economic vision.**
2. **Develop and implement a statewide strategy to develop regional talent and innovation clusters using global best practices.**
3. **Connect economic development, talent, infrastructure, partnerships and other resources within and across regions to build Florida as a globally competitive megaregion.**
4. **Position Florida as a global hub for trade, visitors, talent, innovation and investment.**

Area-Specific Strategies

Talent Supply & Education	Innovation & Economic Development	Infrastructure & Growth Leadership	Business Climate & Competitiveness	Civic & Governance Systems	Quality of Life & Quality Places
5. Align education and workforce development programs to develop and retain talented workers with the skills to meet current and future employer needs. 6. Develop an integrated pre-K through career education system to prepare students for becoming successful workers or entrepreneurs. 7. Lead the nation in science, technology, engineering, and mathematics (STEM) research, education and market-relevant technical skills. 8. Expand access to education and training programs for talent in distressed markets.	**9. Strengthen Florida's leadership in expanding and emerging talent and innovation clusters and help transition established clusters to serve new markets.** 10. Grow, sustain, and integrate efforts related to research and development, technology transfer and commercialization, and capital to create, nurture and expand innovation businesses. 11. Expand the number of Florida businesses selling goods and services internationally and diversify the markets they serve. 12. Brand and consistently market Florida as the best state for business.	**13. Coordinate decision making and investments for economic development, land use, transportation, infrastructure, housing, water, energy, natural resources, workforce and community development at the statewide, regional and local levels.** 14. Develop and maintain multimodal, interconnected trade and transportation systems to support a prosperous, globally competitive economy. 15. Develop and maintain a cutting-edge telecommunications infrastructure. 16. Ensure the future supply and quality of water to meet Florida's economic and quality of life goals. 17. Develop and maintain diverse, reliable, and cost effective energy sources and systems to meet Florida's economic and environmental goals.	**18. Renovate permitting, development, and other regulatory processes to meet changing business needs and provide a predictable legal and regulatory environment.** 19. Ensure state, regional and local agencies provide collaborative, seamless, consistent and timely customer service to businesses. 20. Reduce barriers to small/minority business and entrepreneurial growth. 21. Expand opportunities for access to capital for businesses throughout their life cycle. 22. Work with industry to ensure property and health insurance rates are competitive with other large states. 23. Develop a government revenue structure that encourages business growth and development.	**24. Support and sustain statewide and regional partnerships to accomplish Florida's economic and quality of life goals.** 25. Improve the efficiency and effectiveness of government agencies at all levels. 26. Invest in strategic statewide and regional economic development priorities.	**27. Create and sustain vibrant, safe and healthy communities that attract workers, businesses, residents and visitors.** 28. Ensure Florida's environment and quality of life are sustained and enhanced by future growth plans and development decisions. 29. Promote, develop, protect and leverage Florida's natural, art and cultural assets in a sustainable manner.

c. Innovation Gainesville

Innovation Gainesville (iG) began as a community initiative to harness innovation to create jobs in health and green technologies and thereby to raise the standard of living in the community. Innovation Gainesville has transformed into a cultural mindset with hundreds of individuals and organizations working to grow an environment that fosters innovation and success.

A key facet of the program is the Innovation Gainesville Angel Network of experienced mentors and local accredited investors. The Innovation Gainesville Angel Network helps its members discover and evaluate notable new technology companies in the Gainesville area that are ready for mentoring and/or investment. The Innovation Gainesville Angel Network arranges periodic presentations by investor-ready companies and creates opportunities for local accredited investors to network with one another and review new startups in the area.

d. Santa Fe College Center for Innovation and Economic Development

Santa Fe College located in Gainesville, with a service area of Alachua and Bradford Counties, administers a comprehensive economic development program through its Center for Innovation and Economic Development. The Center provides continuing workforce education (non-credit, job related training), corporate training for local companies, Quick Response Training Grants and meeting spaces. To date, the Center has assisted over 100 new companies through its Entrepreneur Incubator.

Santa Fe College also enhances the local economy through its regular college degree and community education programs. The College is also an active participant in the Innovation Gainesville program, local chambers of commerce and regional workforce development boards.

10. Past, Present, and Projected Future Economic Development Investments

a. Recent Economic Development Investments

i. Florida Innovation Hub at the University of Florida

Florida Innovation Hub Incubator, Gainesville

The Florida Innovation Hub at the University of Florida was created to serve as a catalyst for start-up companies whose technologies emanated from laboratories at the University of Florida and throughout the state. The mission of the Innovation Hub is to provide technology start-ups with the infrastructure, logistics and resources needed to get up and running effectively and efficiently. In doing so, the Innovation Hub helps those companies and others bring research discoveries to the marketplace, creating additional jobs in the region and state. In the first 10 months of operation, Innovation Hub tenant companies secured $7.2 million in private funding and created 85 jobs.

The 48,000-square-foot facility was built with an $8.2 million grant from the U.S. Economic Development Administration and a $5 million contribution from the University of Florida. The Innovation Hub contains office space, wet and dry laboratories, support facilities and community spaces. The Innovation Hub is the anchor building of Innovation Square, which will bridge the University of Florida campus and downtown Gainesville, both figuratively and structurally.

ii. Perry Center for Emerging Technologies - Santa Fe College

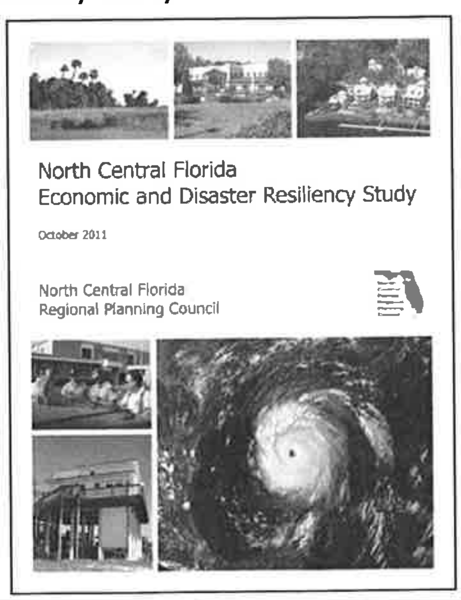
The Charles R. and Nancy V. Perry Center for Emerging Technologies is located in the City of Alachua. The project began in 2005 with a substantial contribution from Charles and Nancy Perry totaling more than $1.36 million. The first phase opened for classes in 2009. The community embraced the Center concept and raised an additional $2 million to assist with the construction. The final phase of the Center was completed with assistance from the U.S. Economic Development Administration, which awarded the Center a $1.7 million grant to construct additional laboratory and classroom facilities.

**Perry Center for Emerging Technologies
Electronics Lab, Alachua**

The new 17,367 square foot facility includes two classrooms, a computer lab, biology lab, biotech lab, director's office, five faculty offices, conference room, clean lab, prep room and storage area. The Center will promote the advancement of higher education in life sciences and health education and is the home of the College's Associate of Science Biotechnology program and the new Bachelor of Applied Science degree in Clinical Laboratory Sciences.

iii. North Central Florida Economic and Disaster Resiliency Study

In August 2008, seven of the counties in the region, Alachua, Bradford, Dixie, Hamilton, Suwannee, Taylor, and Union, sustained significant property damage caused by Tropical Storm Fay and were declared eligible for federal disaster relief funding. In order to prepare the region to rebound economically from future natural disasters and to aid in a more rapid recovery effort, funding was provided to the North Central Florida Regional Planning Council from the U.S. Economic Development Administration to conduct an economic and disaster resiliency study.



The first phase of the study developed a region-wide report detailing maps of Census Block Groups with employment by industry, housing by decade built, critical infrastructures and staging areas. Phase one also identifies which industries are densely located in hurricane/flooding prone areas allowing users to make better decisions.

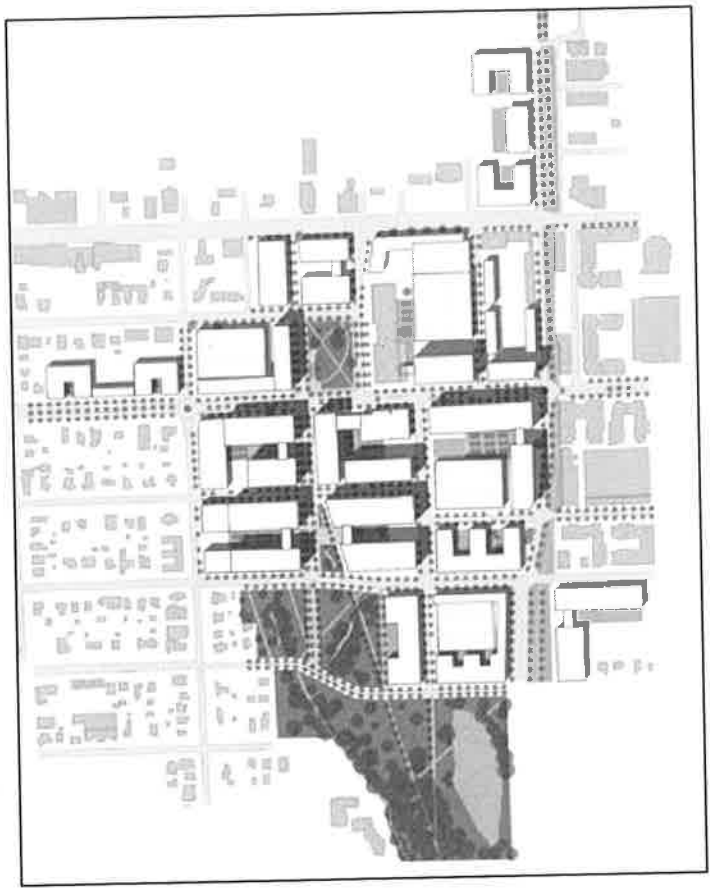
The second phase of the study consisted of a economic analysis of the effects of a catastrophic event on the region. The report details the effects of the positive impacts (reconstruction spending, cleanup activity, influx of federal funds) and the negative impacts (employment, population loss, ad valorem tax loss) and their associated ripple effects across the region.

In partnership with the National Hurricane Center, the impacts of two Saffir-Simpson Category Five hurricanes were modeled using Federal Emergency Management Agency Hazus Multi-Hazard 2.0 computer program. Two hurricane paths were used to evaluate catastrophic damage resulting in the 11 counties of the region. Next, Policy Insight, an econometric model of the regional economy published by Regional Economic Models, Incorporated was used to forecast the economic impacts of these two catastrophic hurricanes. An in-depth analysis of the results was presented in the study.

b. Current Economic Development Investments

i. Innovation Square

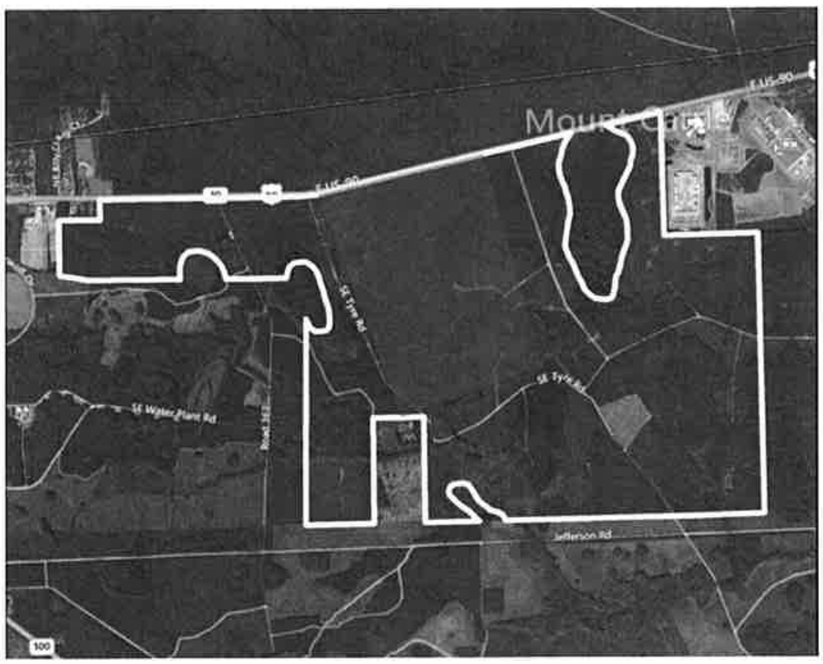
Innovation Square is a 40-acre urban master planned site for a modern innovation-based community in Gainesville. When complete the development will comprise over five million square feet of high-tech offices, research space, urban residences, community retail, boutique hotels and open space that connects the University of Florida with downtown Gainesville. The goal of the Innovation Square community is the fusion of the private sector with the University of Florida. This goal will be accomplished by providing businesses with access to a facility that is recognized for success in transferring new ideas to the marketplace through research, information, and collaboration with talented researchers.


Innovation Square Master Plan, Gainesville

At the heart of the Innovation Square community is a business super incubator that connects entrepreneurs with working capital, attracts the smartest people for a well-trained workforce of tomorrow, and establishes new relationships with forward-thinking companies to change the way residents live, work and play. Innovation Square is intended to create a long-lasting connection with the culturally rich and diverse urban lifestyle of Gainesville and to provide an affordable quality of life with access to premier healthcare, education from top schools and great career opportunities for all.

ii. North Florida Intermodal Park/Columbia County Catalyst Site

The North Florida Intermodal Park is anchored by a 500-acre tract of land owned by Plum Creek. The State has designated the tract as a catalyst site within the North Central Rural Area of Critical Economic Concern. The Catalyst Site is part of a larger 2,622-acre Plum Creek tract designated as a mixed use district. With approval for development of up to eight million square feet of industrial land use, 100,000 square feet of commercial land use, and 300 dwelling units, this district provides an opportunity for significant job creation within the region.



Catalyst Site, Columbia County

Legislation approved by Florida lawmakers provides additional incentives to attract business investment, including the establishment of the Catalyst Site as a Rural Enterprise Zone. This designation allows businesses that locate within the Zone an opportunity to apply for a variety of tax credits and incentives. Additionally, Congress acted to allow the Port of Jacksonville to expand their Foreign Trade Zone western boundaries to include the site. This will allow a portion of the North Florida Intermodal Park to become the magnet site for the Foreign Trade Zone in Columbia County. This designation links the site directly with the Port of Jacksonville, allowing duty free treatment for goods coming in through the Port of Jacksonville during processing/assembly in the Foreign Trade Zone; deferred duty payment until goods leave the Catalyst Site; and duty free treatment for merchandise shipped to foreign countries from the Foreign Trade Zone.

Plum Creek has retained the site location firm, McCallum Sweeney Consulting Services, to evaluate the Intermodal Park site for certification as a Mega Site. Mega site certification pre-qualifies the Intermodal Park site for immediate development, thereby reducing the risk of unanticipated development delays and allows for fast-tracking of development projects, thus lowering development costs.

iii. Suwannee County Catalyst Site

The Suwannee County Board of County Commissioners purchased 100 acres to have available to incentivize potential economic development projects to locate at the State-designated Suwannee County Catalyst Site within the North Central Rural Area of Critical Economic Concern. The Suwannee County catalyst site consists of 500 acres adjacent to the CSX Railroad that runs along the U.S. Highway 90 corridor and within two miles of the Interstate-10/U.S. 90 Interchange. Suwannee County received a U.S. Economic Development Administration Master Plan Grant and a State Rural Infrastructure Fund grant to assist in funding a planning and feasibility study of the site to determine the infrastructure needed to develop and serve the site. The feasibility study and preliminary engineering report for the site have been completed, and site work to prepare the site for economic development projects is anticipated be completed in early 2013.

Catalyst Site, Suwannee County

iv. Florida Energy Resiliency Strategy

Solar farm, Gainesville

Regional planning councils throughout the state are working on the development of a Florida Energy Resiliency Strategy that will examine both statewide and regional energy issues. Objectives of the program include identifying strategies to diversify future energy resources, reducing reliance on foreign energy sources, increasing employment in the domestic energy industry through increased domestic energy consumption and modeling the economic impacts of energy policies and the potential economic impacts of disruptions to energy supplies. Partners in the Energy Strategy development include regional planning councils, the U.S. Economic Development Administration, the U.S. Department of Energy, the Florida Office of Energy and energy industry stakeholders. Development of the Strategy is being funded by a grant from the U.S. Economic Development Administration.

c. Anticipated Economic Development Investments

i. Comprehensive Economic Development Strategy Priority Project Areas

The Comprehensive Economic Development Strategy Priority Project Areas serve as the roadmap for future economic development projects in the region. Future projects that fall within one of the priority project categories and are consistent with the goals and objectives of the Comprehensive Economic Development Strategy will be eligible for funding from the U.S. Economic Development Administration.

1. **Talent Supply & Education** - Support the development of educational programs to increase the labor force in the healthcare and life sciences industry.

2. **Innovation & Economic Development** - Support the development of the catalyst sites for the North Central Florida Rural Area of Critical Economic Concern and the development and expansion of regional business incubators and research parks.

3. **Infrastructure & Growth Leadership** - Support continuing improvements to multi-modal infrastructure, including highway interchanges along interstate corridors, railway corridors, airport facilities and broadband infrastructure.

4. **Business Climate & Competitiveness** - Support streamlining processes at the local level to encourage new businesses to open and help existing businesses thrive.

5. **Civic & Governance Systems** - Support programs to educate local government officials in the fundamentals of economic development.

6. **Quality of Life & Quality Places** - Support regional tourism promotional initiatives.

ii. Santa Fe College Economic Development Initiatives

Santa Fe College and the City of Gainesville are in the process of negotiating a ten-year agreement for the College to provide management for the 30,000 square foot Gainesville Technology Enterprise Center located in East Gainesville. The shared vision is to reposition the Center within the local innovation community and among the other existing incubators (Innovation Hub at UF, Santa Fe College Center for Innovation and Economic Development and Sid Martin Biotechnology Incubator). The broad goal will be to provide incubation and support for start-up and fledgling companies and then transition them to more permanent facilities within the local community. In addition to serving resident companies, there will be an effort to situate a prototyping laboratory and an office for community technology transfer within the Gainesville Technology Enterprise Center. These functions will provide significant assistance to inventors and entrepreneurs from the local community.

B. Performance Measures

1. Number of Jobs Created After Implementation of the Comprehensive Economic Development Strategy

a. Total Employment in Initial Year

b. Total Employment in Subsequent Years

2. Number and Types of Public Sector Investments Undertaken in the Region

a. EDA Sponsored Investments

b. Significant State and Local Investments

3. Number of Jobs Retained in the Region

a. Number of Jobs Retained as a Result of Federal Investments

b. Number of Jobs Retained as a Result of Select State and Local Investments

4. Amount of Private Sector Investment in the Region After Implementation of the Comprehensive Economic Development Strategy

5. Changes in the Economic Environment of the Region (Changes to Taxes and Fees, and New Incentive Programs)

C. Six Pillars Measures

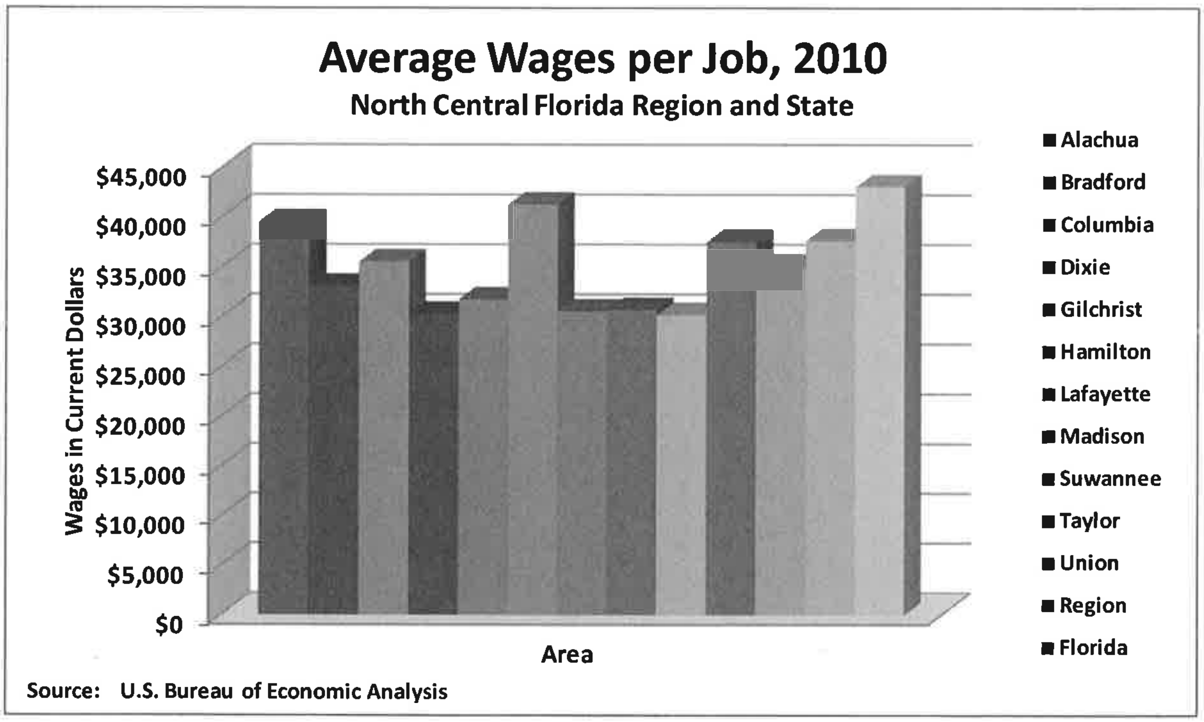
1. Talent Supply & Education

a. Average Annual Wage

As shown in Illustration C-1, average wages per job in most of the counties within the region are significantly lower than average wages for the state. In 2010, overall average wages per job across the region were more than $5,400 short of state average wages.

Illustration C-1

Average Annual Wages per Job
North Central Florida Region and State
Current Dollars
2010

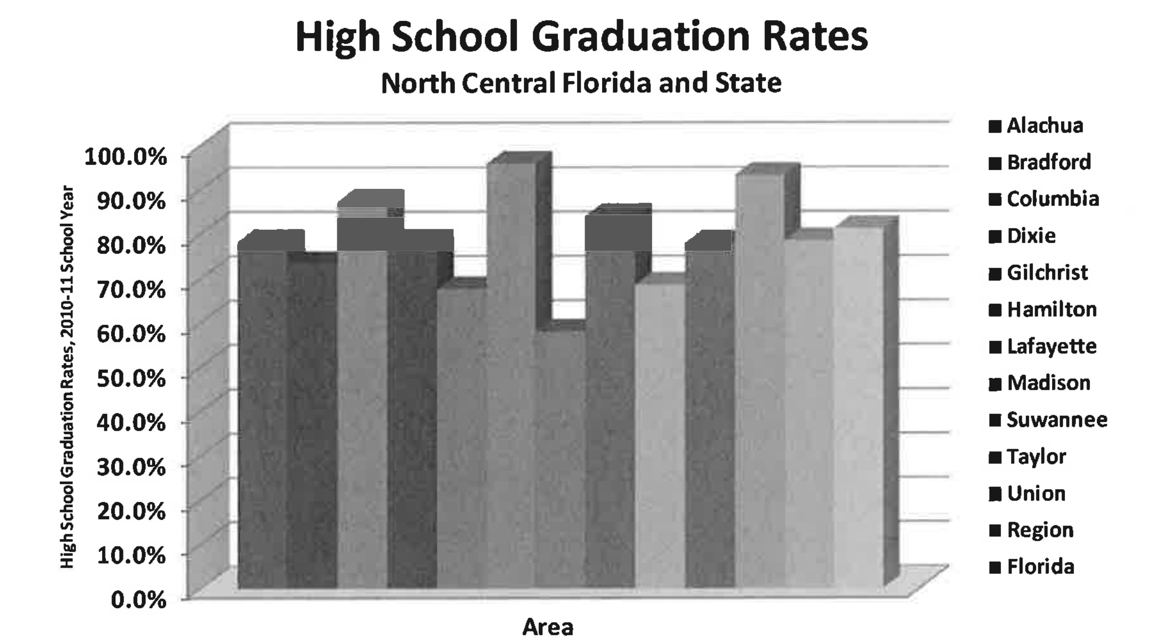


b. High School Graduation Rates

As shown in Illustration C-2, during the 2010-11 school year the high school graduation rate for the region was only slightly less than the state rate. Four counties, Columbia, Hamilton, Madison and Union have high school graduation rates higher that of the state, while the remaining seven counties fell below the state rate.

Illustration C-2

High School Graduation Rates
North Central Florida Region and State
School Year 2010-11



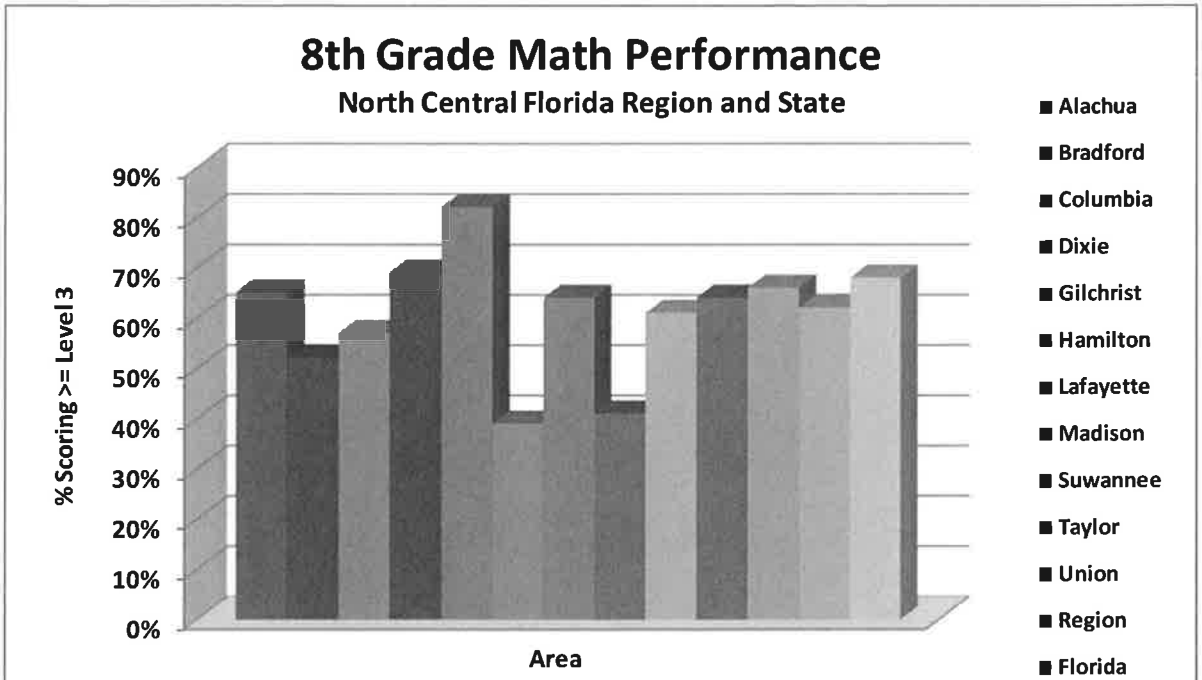
Source: Florida Department of Education, Data Publications and Reports: Students

c. 8th Grade Math Performance

As shown in Illustration C-3, in 2010, the 8th grade math performance on the Florida Comprehensive Assessment Test of the region lagged behind that of the state. Only Gilchrist and Dixie Counties exceeded state averages for this measure.

Illustration C-3

8th Grade Math Performance on the Florida Comprehensive Assessment Test
Percent Scoring >= Level 3 of 5
North Central Florida Region and State
2010



Source: Florida Department of Education, Florida Comprehensive Assessment Test

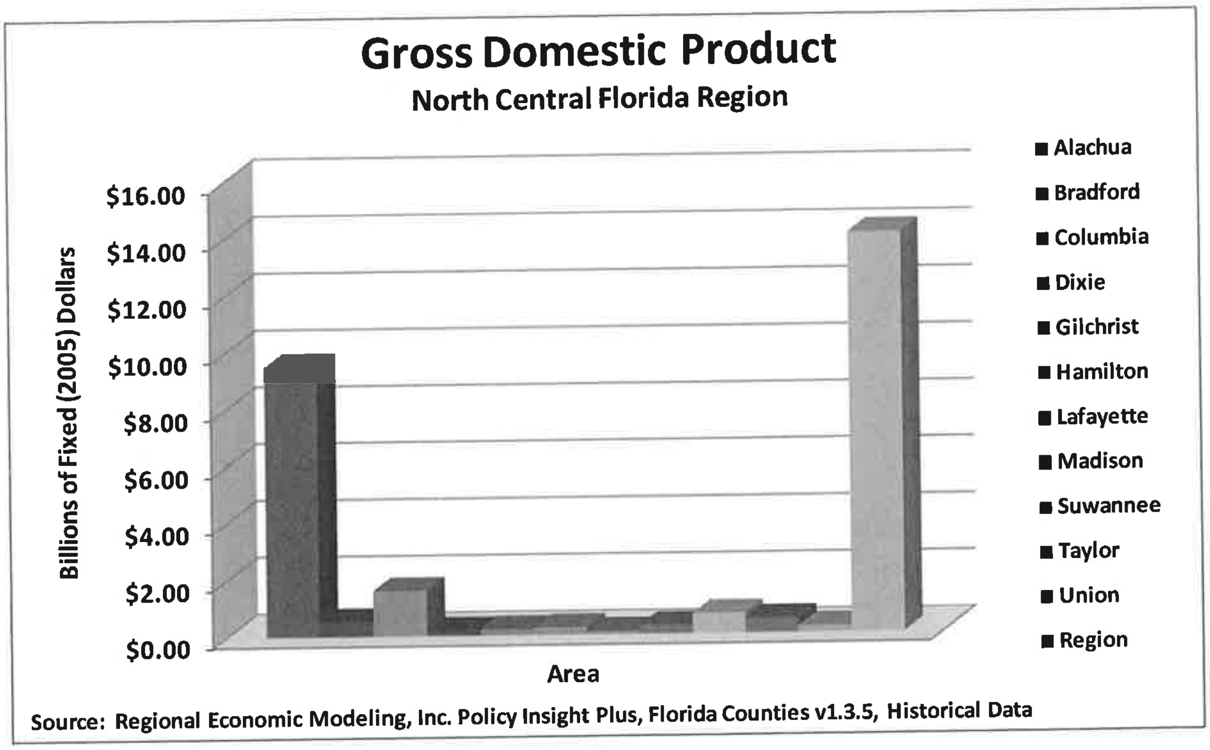
2. Innovation & Economic Development

a. Gross Domestic Product

Illustration C-4 shows that Alachua County is the largest economic engine of the region, accounting for nearly two-thirds of regional Gross Domestic Product. Alachua County is the only urban county in the region and the presence of the University of Florida and the economic activity surrounding it are major factors in the economic livelihood of the county.

Illustration C-4

Gross Domestic Product
North Central Florida Region
Billions of Fixed 2005 Dollars
2010

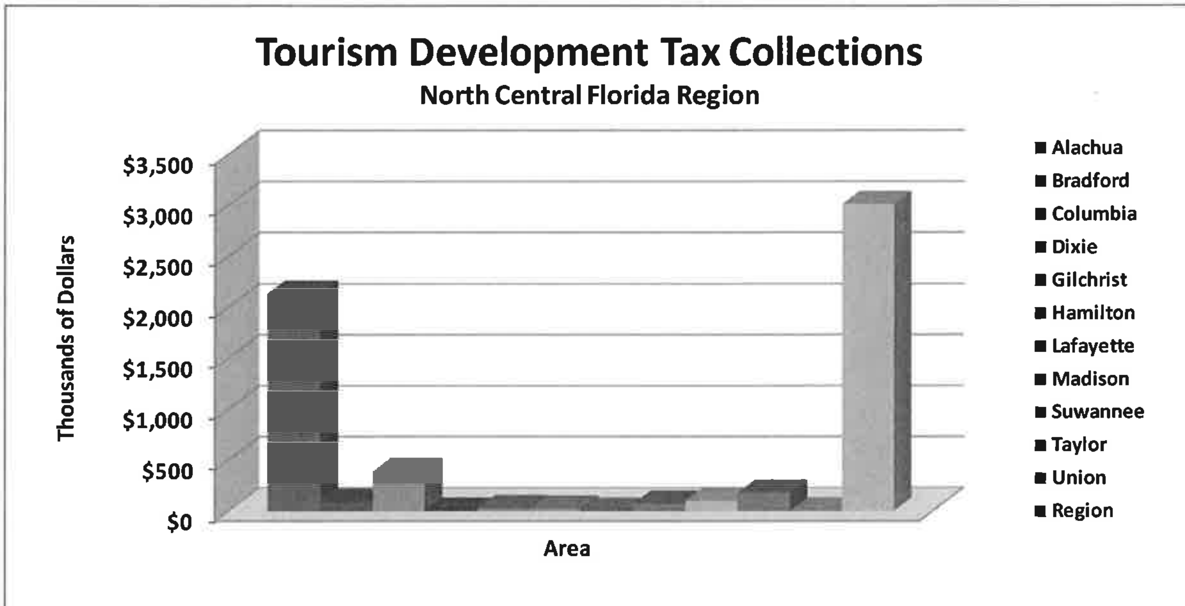


b. Bed Tax Collections

Illustration C-5 shows that the majority of Tourism Development Taxes in the region are generated in Alachua County. This is due in large part to the high volume of visitors generated by the presence of the University of Florida and the nationally acclaimed sports programs of the school. The other ten rural counties of the region rely on nature-based amenities such as springs, rivers and the Gulf of Mexico to attract visitors.

Illustration C-5

Tourism Development Tax Collections
North Central Florida Region
Thousands of Dollars
Fiscal Year 2009-10



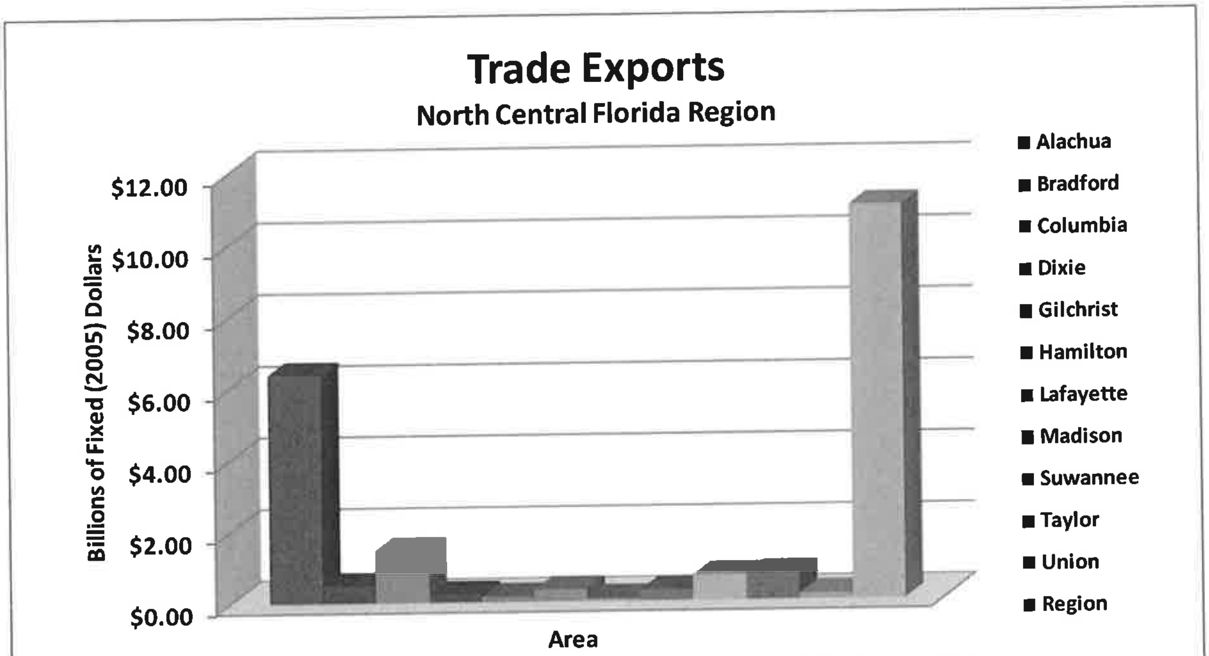
Source: Florida Department of Revenue, Local Government Tax Receipts by County

c. Trade Exports and Imports

Illustration C-6a shows that Alachua County accounts for over one-half of all exported goods and services from the region, followed by Columbia County with just over 13 percent. This is primarily due to the higher concentration of population and businesses located in the urbanized areas of Alachua County.

Illustration C-6a

Trade Exports
North Central Florida Region
Billions of Fixed 2005 Dollars
2010

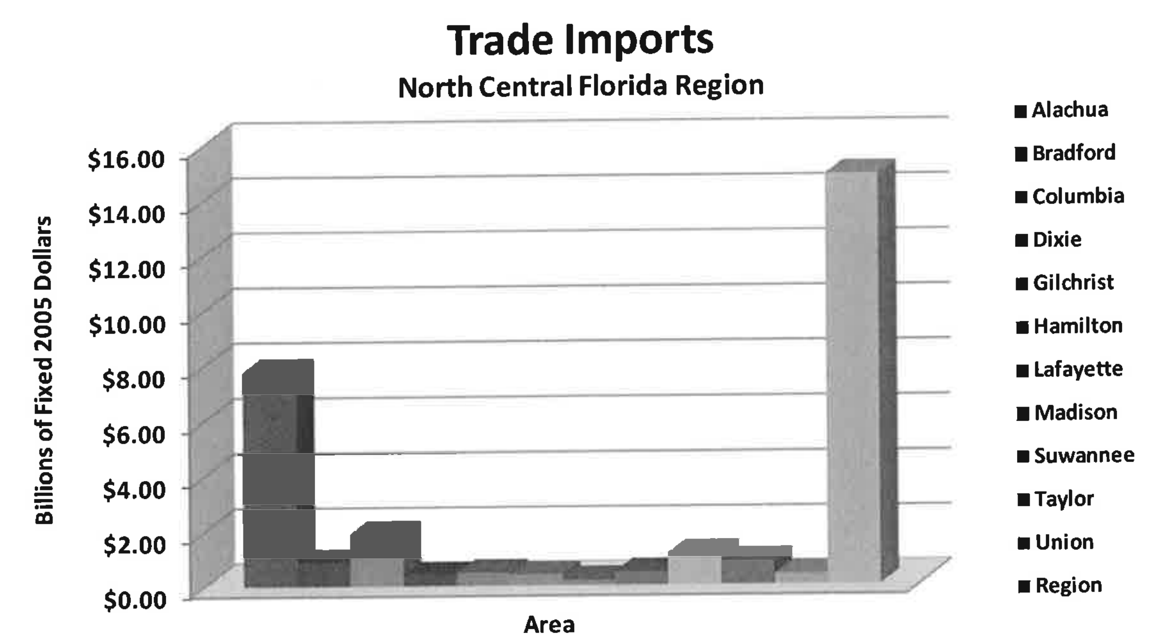


Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

Illustration C-6b shows that Alachua and Columbia Counties are the two largest importers of goods and services in the region, accounting for 52 percent and 13 percent respectively. In 2010, the region imported $3.9 billion more than it exported, meaning that the region as a whole is a net importer of goods and services, as are each of the counties within the region.

Illustration C-6b

Trade Imports
North Central Florida Region
Billions of Fixed 2005 Dollars
2010



Source: Regional Economic Modeling, Inc. Policy Insight Plus, Florida Counties v1.3.5, Historical Data

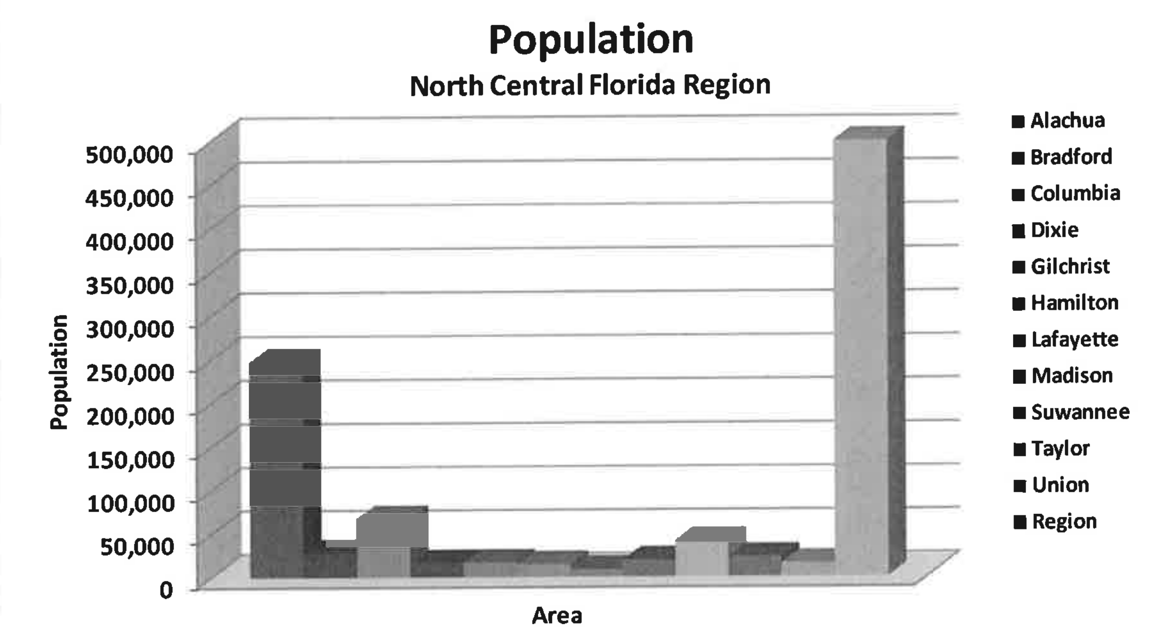
3. Infrastructure & Growth Leadership

a. Population Counts, Estimates and Projections

Illustration C-7 shows that in 2010, the region had just under one-half million residents, and that nearly one-half of the population of the region resided within Alachua County, the only urban county within the region.

Illustration C-7

Population Counts, Estimates and Projections
North Central Florida Region
2010



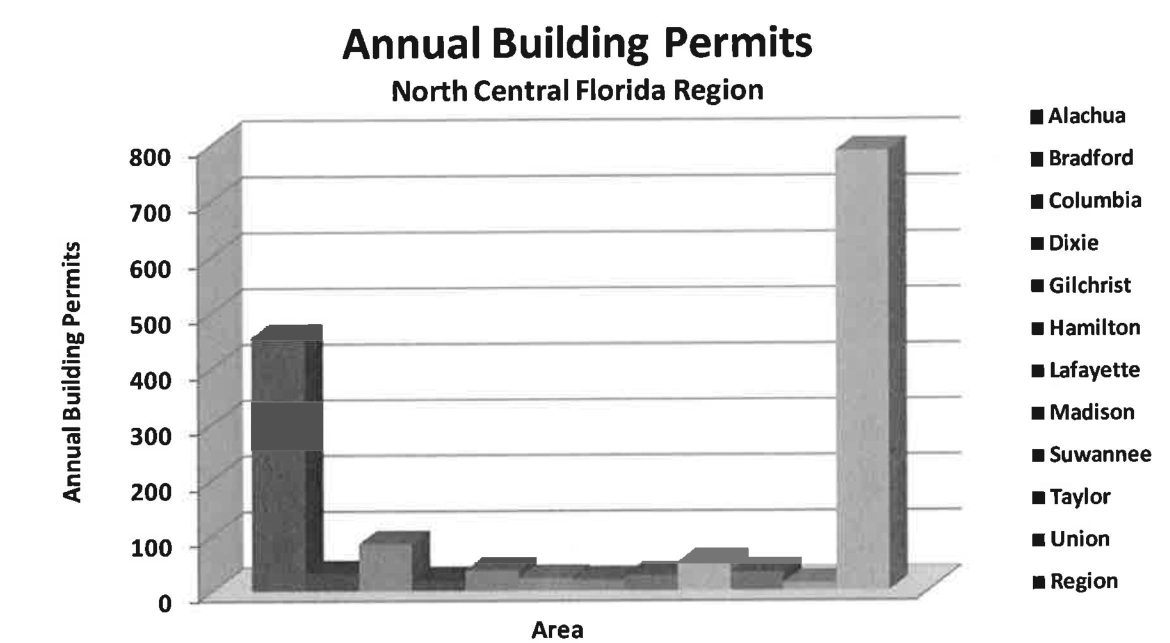
Source: Florida Statistical Abstract, 2011 Editions, Tables 1.20, 1.40

b. Building Permits

Illustration C-8 shows that in 2010, the majority of new residential construction activity in the region was centered in Alachua County. Residential construction in the region is still suffering from the after-effects of the national housing market collapse in 2006, and none of the counties in the region are building new homes at a rate similar to previous levels. The number of permits for new housing in the region as a whole is only 25 percent of the number of permits obtained in 2001.

Illustration C-8

Annual Building Permits
North Central Florida Region
Residential Units
2010



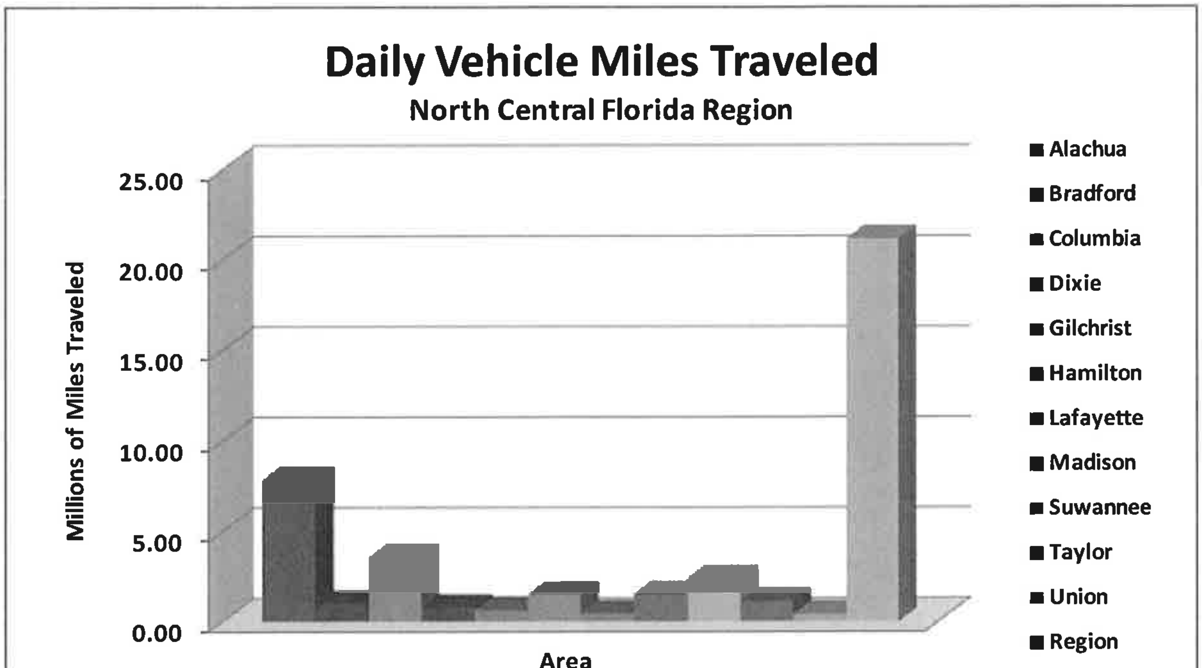
Source: U.S. Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units

c. Vehicle Miles Traveled

Illustration C-9 shows average daily vehicle miles traveled in the region. The five counties with interstate highways, Alachua, Columbia, Hamilton, Madison and Suwannee, all have the highest daily traffic volumes in the region.

Illustration C-9

Daily Vehicle Miles Traveled
North Central Florida Region
Millions of Miles
2010



Source: Florida Department of Transportation, Florida Highway Mileage and Travel Report, Summary since 1990

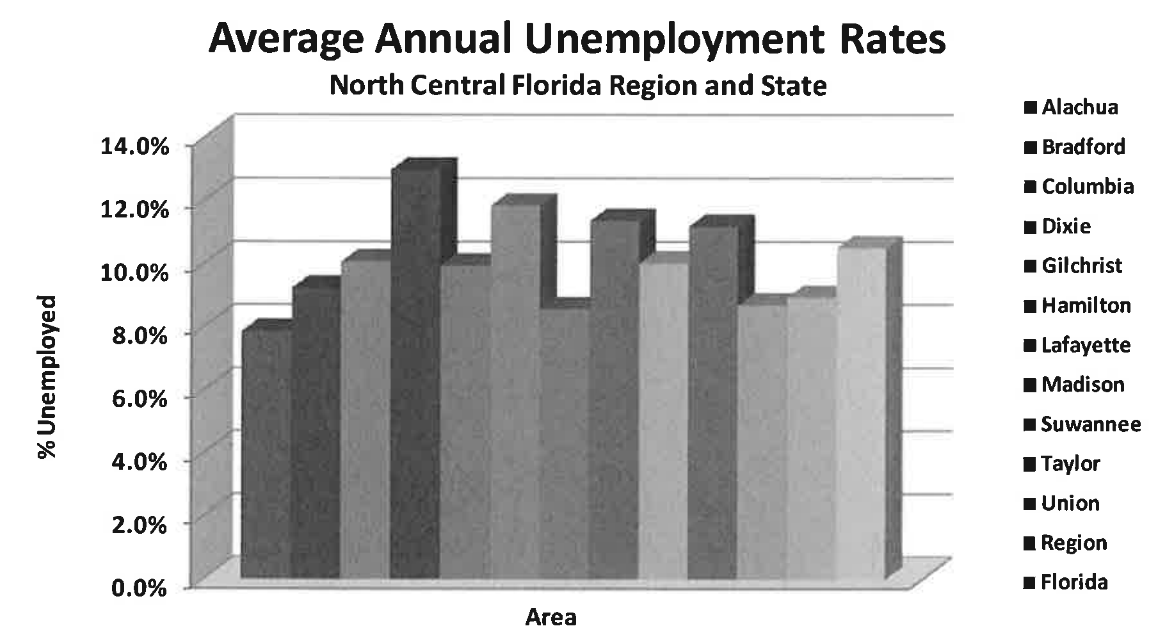
4. Business Climate & Competitiveness

a. Average Annual Unemployment Rates

Illustration C-10 shows the average unemployment rate for the region and state. In 2010, average annual unemployment in the counties within the region ranged from a low of 7.9 percent in Alachua County to a high of 13.0 percent in Dixie County. Overall, the regional annual unemployment rate of 8.9 percent was 1.6 percent lower than the state rate of 10.5 percent.

Illustration C-10

Average Annual Unemployment Rates
North Central Florida Region and State
2010

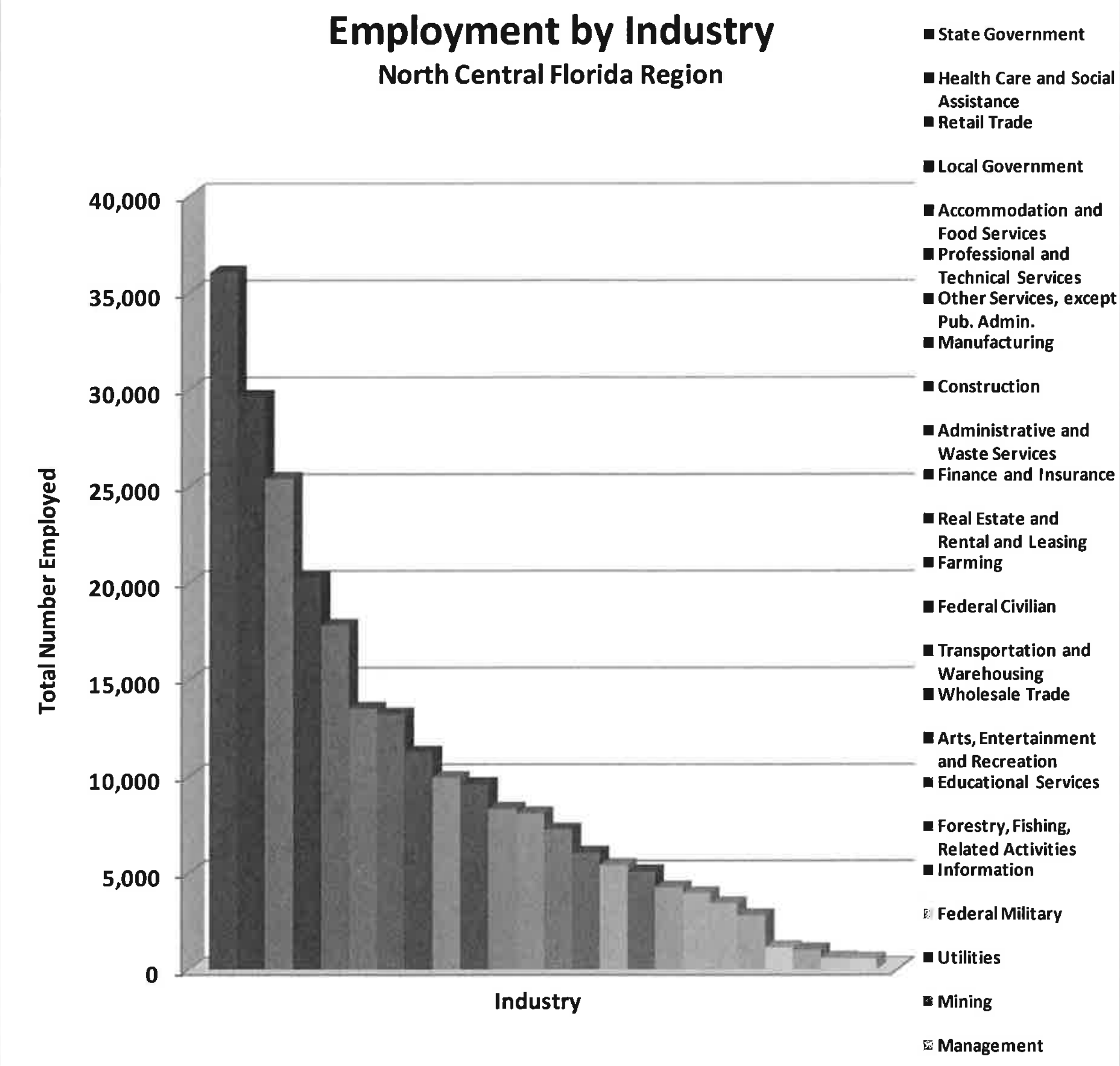


Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics

b. Employment by Industry

Illustration C-11a

Employment by Industry
North Central Florida Region
2010



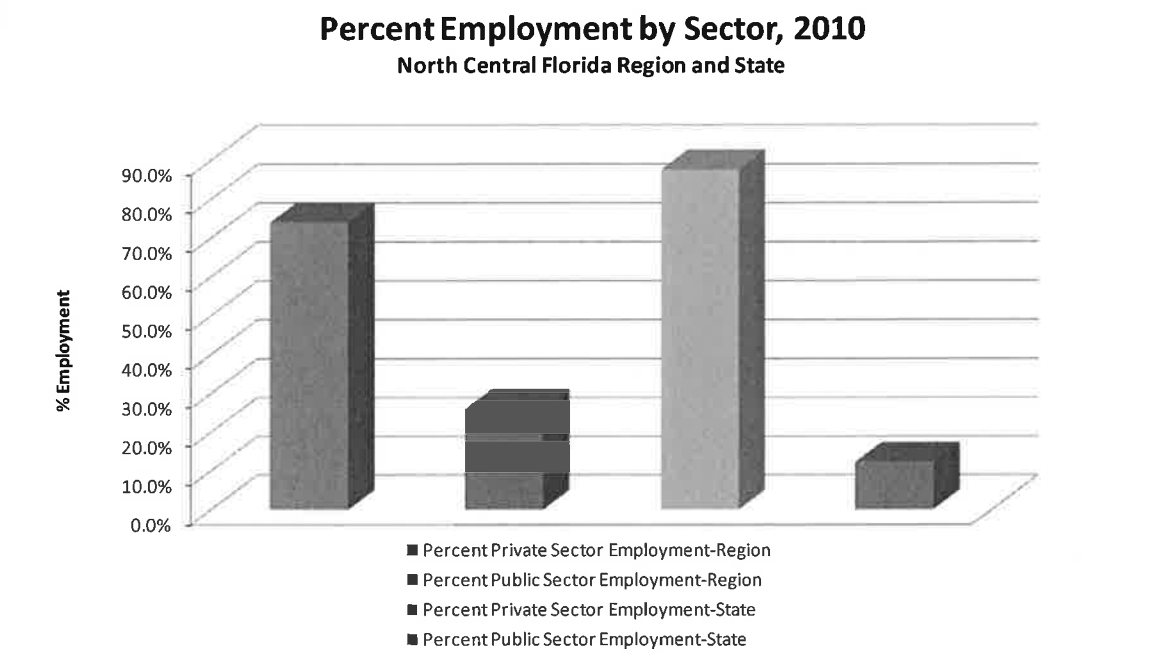
Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

Illustration C-11a above shows that in 2010, the top five employment industries in the region were State Government, Health Care and Social Assistance, Retail Trade, Local Government and Accommodation and Food Services. These five industries represent over 52 percent of total employment in the region.

Illustration C-11b shows percent employment by sector. In 2010, 74 percent were employed in the private sector, as opposed to 26 percent in the public sector, which is more than double the overall state employment in the public sector of 12.3 percent. The variance in employment patterns is due to a high concentration of state educational employees, as well as state prison employees in the region.

Illustration C-11b

Percent Employment by Sector
North Central Florida Region and State
2010

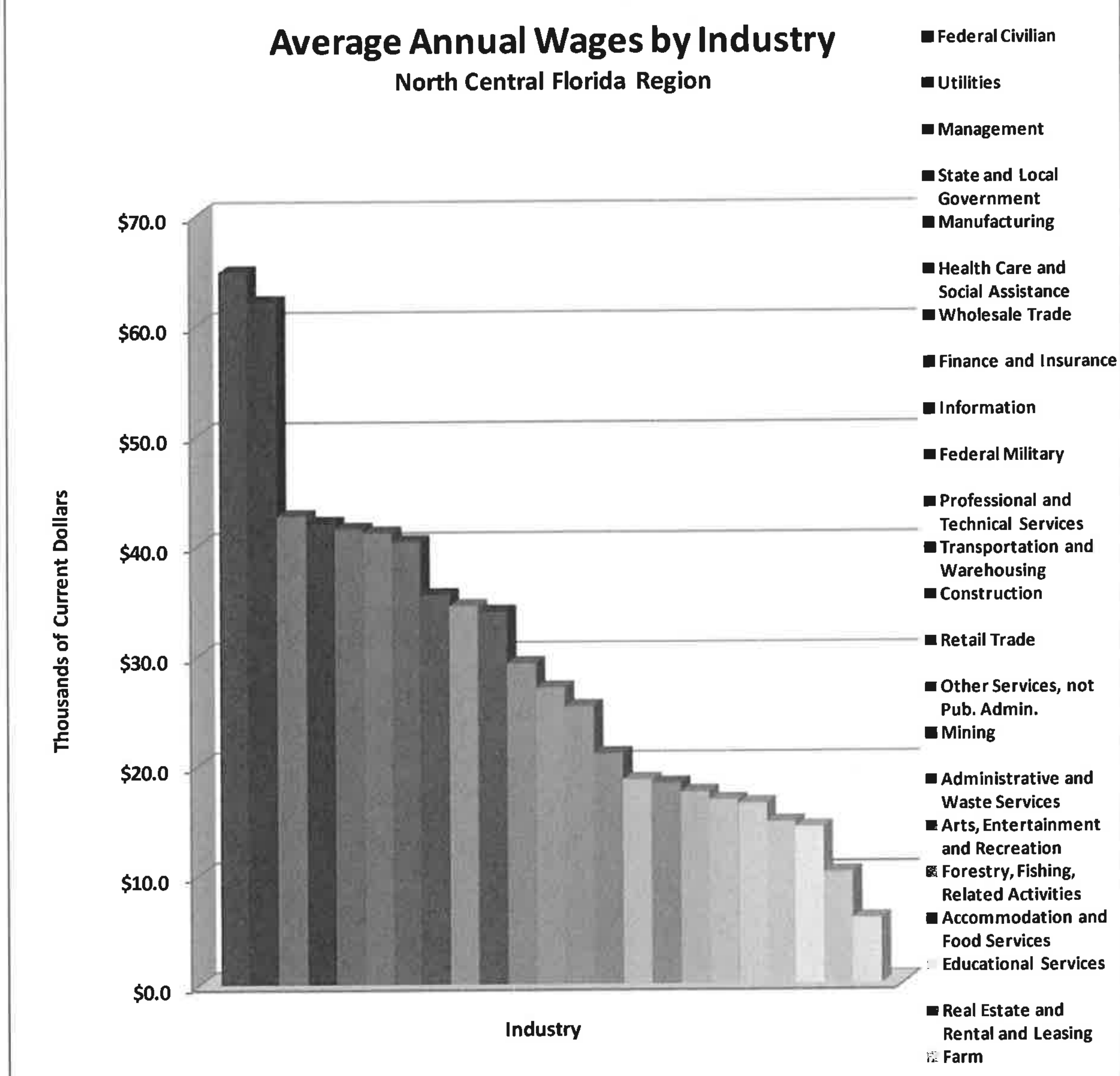


Source: Regional Economic Modeling, Inc., Policy Insite +, Florida Counties, v1.3, U.S. Bureeau of Economic Analysis Data

c. Wages by Industry

Illustration C-12a

Average Annual Wages by Industry
North Central Florida Region
Thousands of Current Dollars
2010



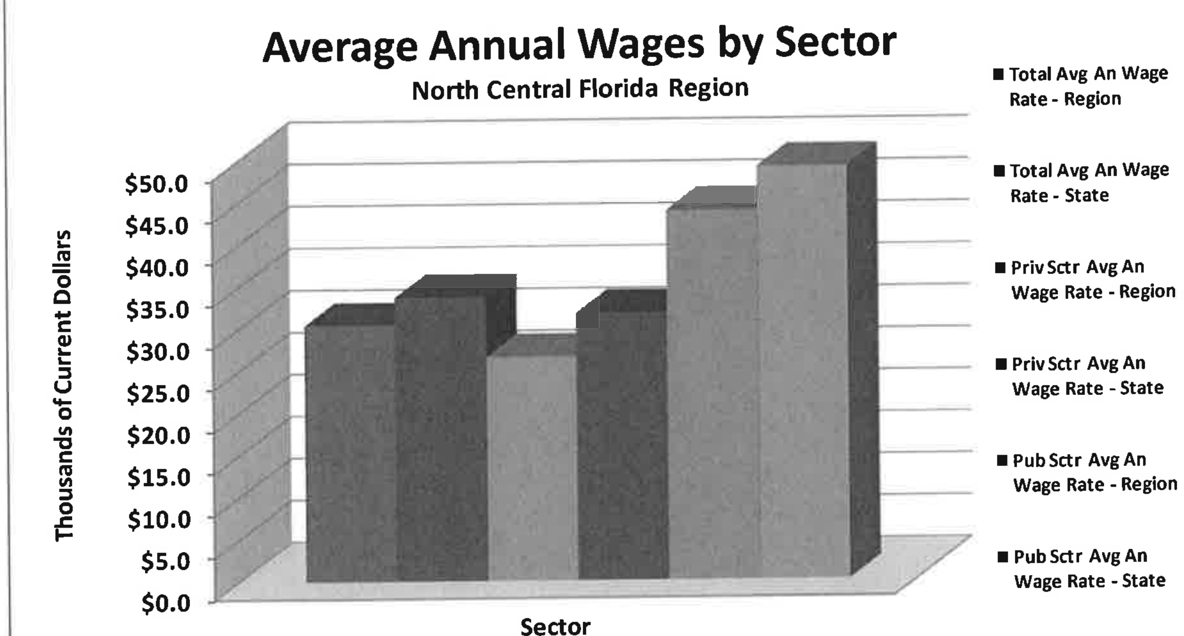
Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

Illustration C-12a above shows that in 2010, the Federal Civilian and Utilities employment categories paid substantially higher wages than any other category of employment. The difference between those two employment categories and all others can be attributed to the higher and more specialized educational requirements for employment in those fields.

Illustration C-12b shows that in 2010, in both the private as well as public sectors, regional average annual wages lag behind those of the state. Private sector average annual wages in the region were over 16 percent less that state average wages, while in the public sector, average annual wages were over 11 percent below state averages.

Illustration C-12b

Average Annual Wages by Sector
North Central Florida Region
Thousands of Current Dollars
2010



Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

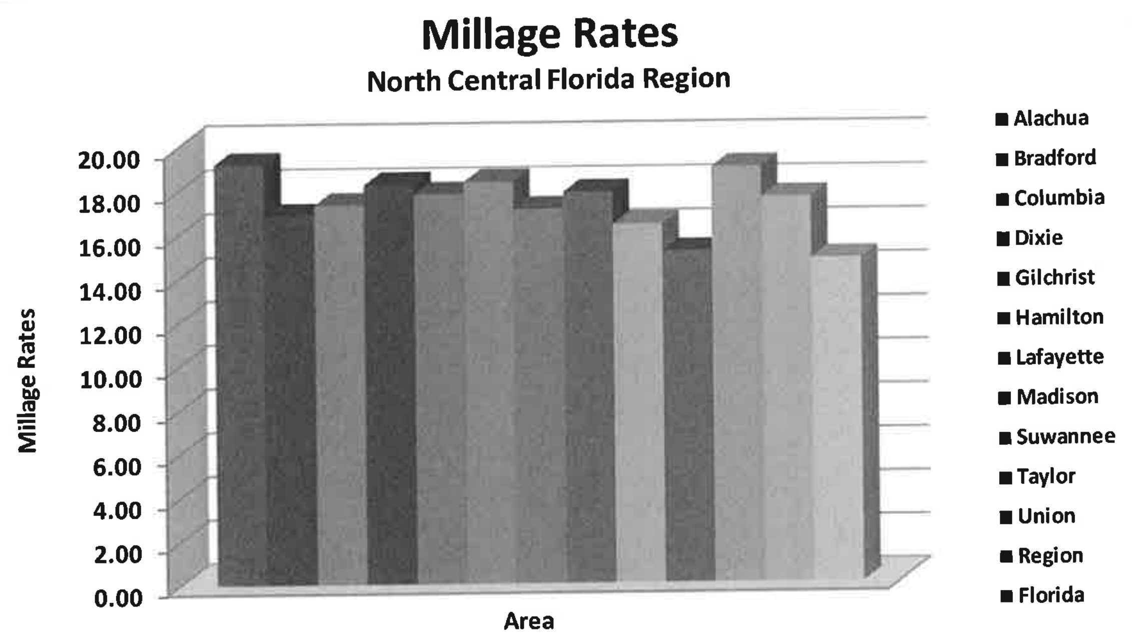
5. Civic & Governance Systems

a. Millage Rates

Illustration C-13 shows that in 2010, millage rates across the region were higher than the state average millage rate. The region generally has some of the lowest property values in the state, and also has significant publicly held lands that do not contribute to the tax base. Therefore, local governments must rely on higher millage rates to provide funding for services.

Illustration C-13

Millage Rates
North Central Florida Region and State
2010



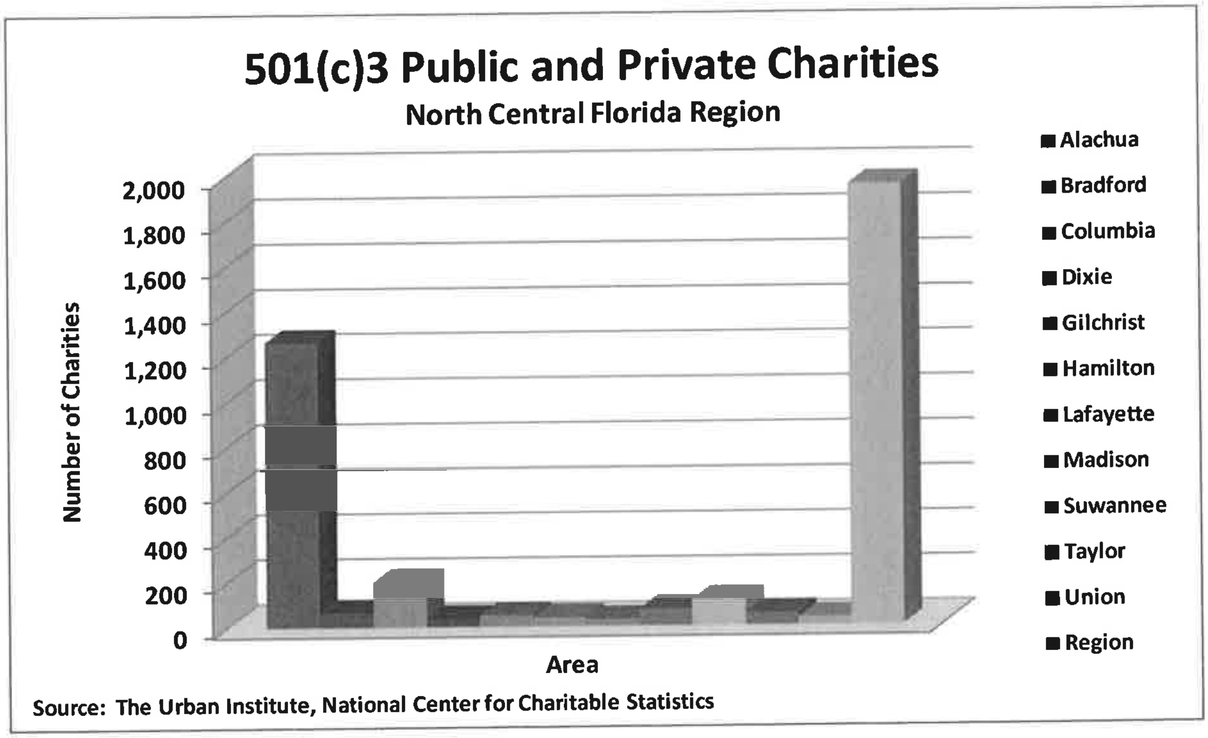
Source: Florida Department of Revenue, Millage and Taxes Levied Report

b. Registered Nonprofit Organizations

Illustration C-14 shows that in 2010, the majority of charitable organizations are located within the most populous three counties in the region, Alachua, Columbia and Suwannee. When combined, the top three counties represent over 80 percent of total registered charities in the region.

Illustration C-14

Registered 501(c)3 Organizations
Public and Private Foundation Charities
North Central Florida Region
2010

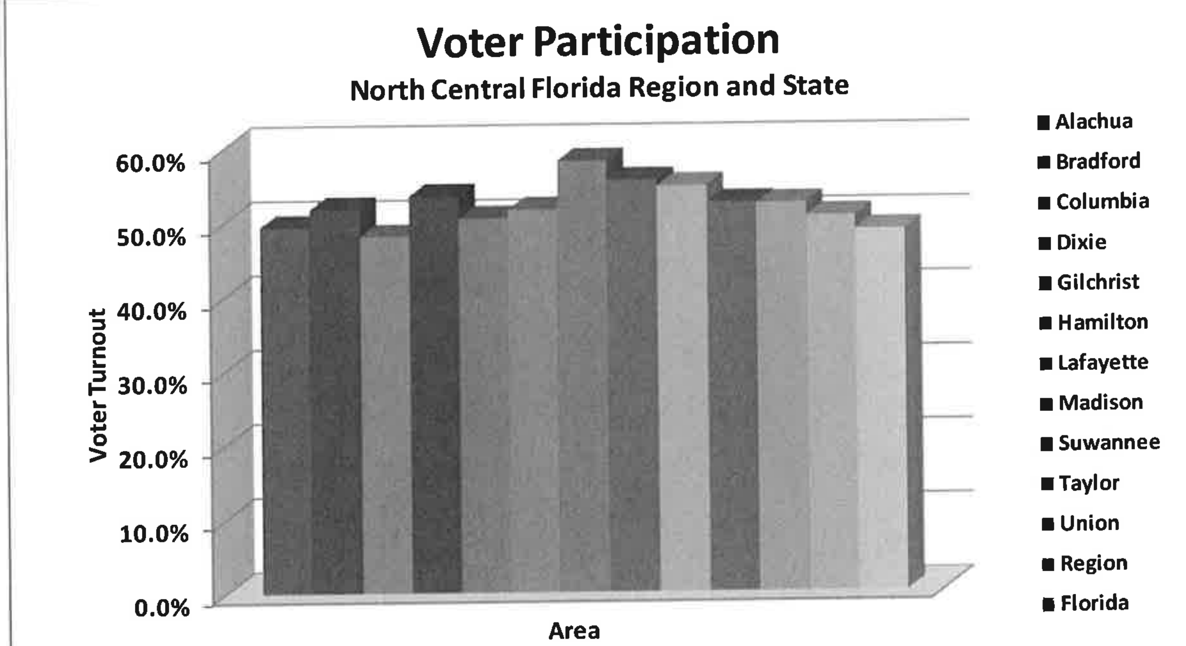


c. Voter Participation

Illustration C-15 shows that in the 2010, non-presidential biennial general election, voter participation across the region was somewhat higher than that of the state. Voter participation across the region fell within a range of 10 percentage points.

Illustration C-15

**Voter Participation
North Central Florida Region and State
Biennial General Elections
2010**



Source: Florida Department of State, Division of Elections

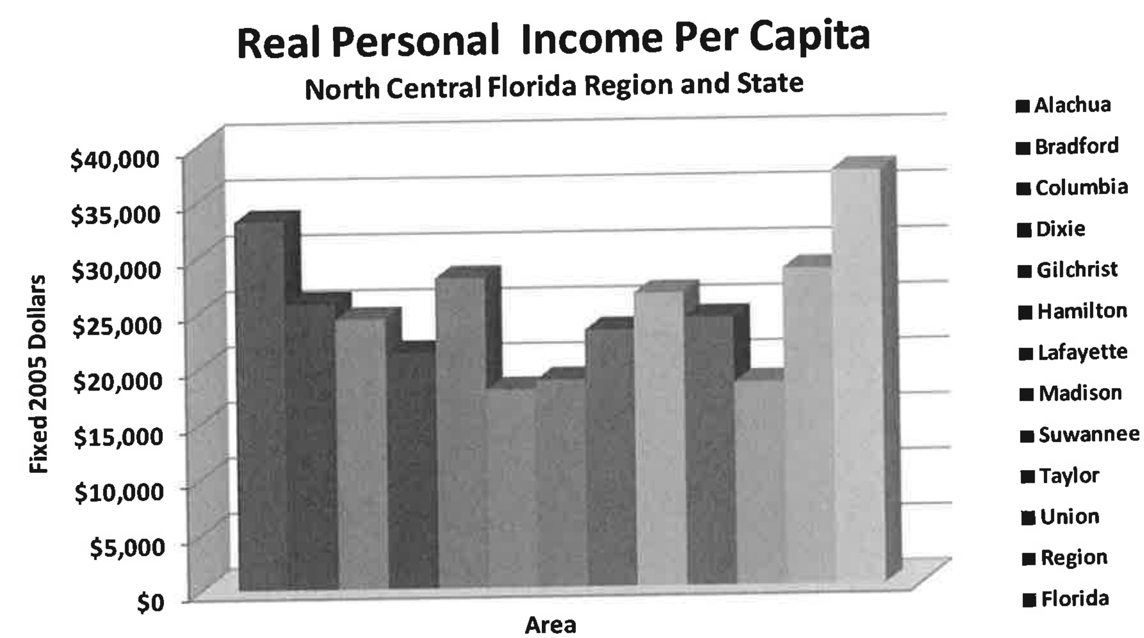
6. Quality of Life & Quality Places

a. Per Capita Income

Illustration C-16 shows that in 2010, per capita incomes across the region fell well short of the state average per capita income. The region as a whole had an average per capita income that was over 30 percent less than the state per capita income, Hamilton County had less than one-half the state average per capita income.

Illustration C-16

Real Personal Per Capita Income
North Central Florida Region and State
Fixed 2005 Dollars
2010



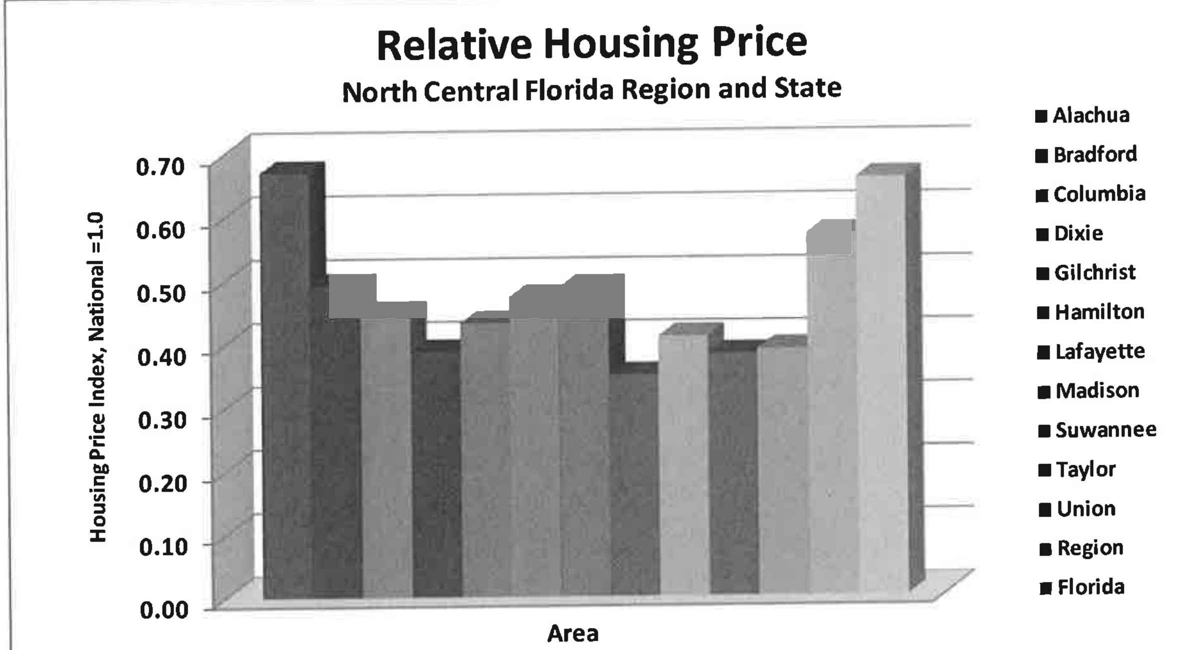
Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3, U.S. Bureau of Economic Analysis Data

b. House Purchase Price and Cost Index

Illustration C-17 shows that in 2010, housing in the region remained affordable relative to state and national averages. Only Alachua County had a housing price index value greater than that of the state. The majority of counties within the region had relative housing price index values less than one-half of the national average.

Illustration C-17

Relative Housing Price
North Central Florida Region and State
National Index = 1.0
2010



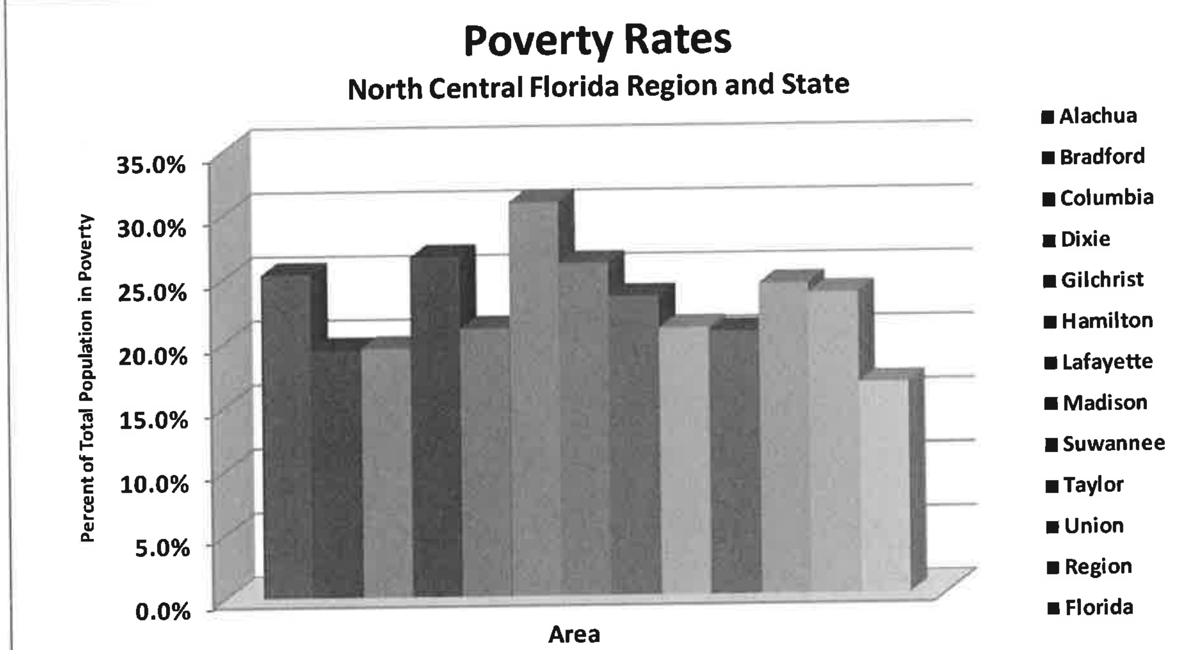
Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.3

C. Persons Living in Poverty

Illustration C-18 shows that in 2010, poverty rates across the region exceeded the state poverty rate. As a whole, the regional poverty rate exceeded the state rate by over seven percent, while counties within the region exceeded the state rate by as much as 14.3 percent.

Illustration C-18

Percent of Persons Living in Poverty
North Central Florida Region and State
2010



Source: U.S. Department of Commerce, Census Bureau

D. Community and Private Sector Participation - The Six Pillars Caucus System and Comprehensive Economic Development Strategy Development

The members of the Comprehensive Economic Development Strategy Committee and Regional Planning Council performed the policy guidance function of a Six Pillars Caucus. The Comprehensive Economic Development Strategy Committee represents a broad range of community organizations. Members are invited to participate as members on the committee based on their experience in private enterprise, economic development, education, civic and minority representation and workforce development. The Goals, Objectives and overall Strategy were developed based on the collective understanding by the Committee of the economic development needs of the region. The Committee members responsible for drafting the 2013-2017 Comprehensive Economic Development Strategy are, as follows:

Harvey Campbell, Executive Director, Columbia County Tourist Development Council

Dennis Cason, President, Suwannee County Chamber/Economic Development Alliance

Allen Cherry, Executive Director, Madison County Development Council

Chris Coleman, Registered Representative, East Gainesville Corp./Falcon Financial Group

** Thomas Collett, President, TDC Entertainment

Dennille Decker, Director, Columbia County/Lake City Chamber

Scott Fredrick, Director, Taylor County Development Authority

Charles Hall, President, Florida Gateway College

Jeff Hendry, Executive Director, North Florida Economic Development Partnership

Dug Jones, Assistant Vice-President for Economic Development, Santa Fe College

Jesse Quillen, Director, Columbia County Economic Development

David Ramsey, Senior Director, Gainesville Area Chamber/Council for Economic Outreach

* Susan Ramsey, Executive Director, Hamilton County Development Authority

Sheryl Rehberg, Executive Director, North Florida Workforce Development Board

Kim Tesch-Vaught, Executive Director, Florida Works Workforce Development Board

* Chair
** Vice-Chair

North Central Florida Regional Planning Council

Comprehensive Economic Development Strategy Team

Scott R. Koons, AICP, Executive Director

* Bryan S. Thomas, Economic Development Program Director

** Kevin D. Parrish, Information Technology and Property Management Director

** Carol Laine, Executive Assistant to the Executive Director

** Jean Strong, Secretary II

* Primary Responsibility
** Secondary Responsibility

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North Central Florida Regional Planning Council

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