North Central Florida Regional Planning Council

Serving
Alachua • Bradford
Columbia • Dixie • Gilchrist
Hamilton • Lafayette • Levy • Madison
Marion • Suwannee • Taylor • Union Counties

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

MEETING NOTICE

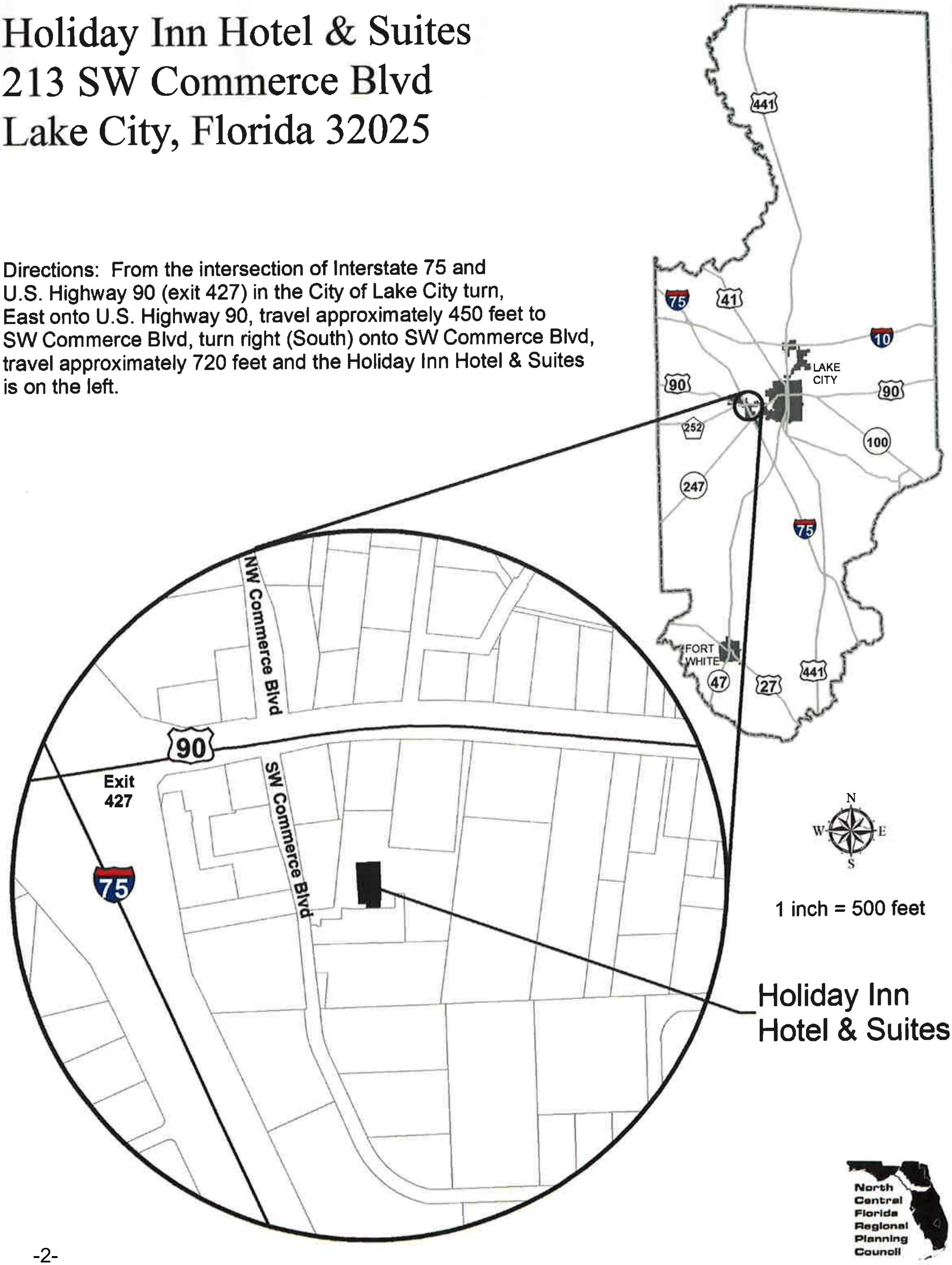
REGIONAL PLANNING COMMITTEE

There will be a meeting of the Regional Planning Committee of the North Central Florida Regional Planning Council on **February 25, 2016**. 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

February 25, 2016
6:30 p.m.

		PAGE NO.
I.	APPROVAL OF THE JANUARY 28, 2016 MEETING MINUTES	**5**
II.	REVIEW OF PROPOSED AMENDMENTS TO THE ECONOMIC DEVELOPMENT ELEMENT OF THE NORTH CENTRAL FLORIDA STRATEGIC REGIONAL POLICY PLAN	

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NORTH CENTRAL FLORIDA REGIONAL PLANNING COUNCIL

REGIONAL PLANNING COMMITTEE

MINUTES

Holiday Inn Hotel & Suites
Lake City, Florida

January 28, 2016
6:30 p.m.

MEMBERS PRESENT

Beth Burnam, Vice-Chair
Charles Chestnut, IV
James Montgomery
Robert Wilford
Stephen Witt

MEMBERS ABSENT

William Hunter
Mike Williams

STAFF PRESENT

Steven Dopp

The meeting was called to order by Vice-Chair Burnam at 6:30 p.m.

I. APPROVAL OF THE SEPTEMBER 24, 2015 MEETING MINUTES

ACTION: **It was moved by Mayor Witt and seconded by Commissioner Wilford to approve the September 24, 2015 Committee minutes as circulated. The motion carried unanimously.**

II. COORDINATION OUTLINE

Mr. Dopp presented proposed amendments to the Affordable Housing Element of the North Central Florida Strategic Regional Policy Plan. The Committee reviewed and discussed the proposed amendments.

The meeting adjourned at 6:47 p.m.

Beth Burnam, Chair

2/25/16
Date

Chapter II
Economic Development

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

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 Opportunity and have developed 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 reports data contained in the North Central Florida Comprehensive Economic Development Strategy, 2013 - 2017 which, in turn, 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.

The North Central Florida Regional Planning Council region includes 58 county and municipal governments. The 13 counties include Alachua, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Levy, Madison, Marion, Suwannee, Taylor and Union. The 45 municipalities include (by County): Alachua - Alachua, Archer, Gainesville, Hawthorne, High Springs, LaCrosse, Micanopy, Newberry and Waldo; Bradford - Brooker, Hampton, Lawtey and Starke; Columbia - 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; Levy - Bronson, Cedar Key, Chiefland, Inglis, Otter Creek, Williston and Yankeetown; Madison - Greenville, Lee and Madison; Marion - Belleview, Dunnellon, McIntosh, Ocala and Reddick; Suwannee - Live Oak and Branford; Taylor - Perry; Union - Lake Butler, Raiford and Worthington Springs.

The North Central Florida Economic Development District has a total of 9,717 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 and Marion Counties, the region is primarily rural, with a 2010 U.S. Census population of 874,401. Over one-half of the population, 578,369, resides in Alachua and Marion 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.

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 and the Ocala International Airport provide scheduled commercial service.

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 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.

2. Analysis of Economic Development Problems and Opportunities

a. Talent Supply & Education

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.

b. Average Annual Wages

As shown in Table 2., average annual wages in the region as a whole lag significantly behind average annual wages for the state. In 2010, Alachua County, with average annual wages over $39,000, is nearly $4,000 lower than state averages. In 2010, Levy County, with the lowest average annual wages in the region at just under $30,000, has a nearly $13,000 disparity with state average wages. The table 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 2.1

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
Levy	$22,348	$22,672	$23,920	$25,406	$26,130	$27,248	$28,041	$28,985	$28,817	$29,438
Madison	$21,748	$22,277	$23,361	$24,846	$25,752	$27,216	$28,470	$29,386	$30,148	$30,680
Marion	$26,686	$27,538	$28,621	$29,809	$31,047	$32,682	$33,171	$34,058	$34,328	$34,808
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>

C. High School Graduation Rates

As shown in Table 2.2, the regional High School Graduation Rate was higher than the statewide average between the 2000-01 and 2008-09 school years but has trailed that of the state in the 2009-10 and 2010-11 school years. In the 2010-11 school year, eight of the 13 counties in the region fell below the statewide rate, with only five counties exceeding state rates. The table also demonstrates that although regional graduation rates were comparable to stateside rates, the overall trend line for the region has been negative since the 2008-09 school year.

Table 2.2

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%
Levy	74.3%	75.8%	79.8%	79.8%	76.2%	79.0%	81.2%	81.0%	80.2%	85.8%
Madison	77.5%	90.7%	89.8%	90.4%	89.7%	90.7%	95.9%	93.8%	91.2%	84.0%
Marion	68.9%	73.8%	75.3%	81.5%	76.9%	78.7%	79.3%	79.4%	79.2%	74.6%
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	68.0%	70.4%	71.4%	74.1%	71.6%	73.5%	73.9%	78.2%	77.9%	77.1%
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

d. 8th Grade Math Performance

As shown in Table 2.3, 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 three school districts, Dixie, Levy 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 2.3
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%
Levy	57%	55%	56%	51%	55%	60%	61%	64%	68%	69%
Madison	41%	22%	34%	31%	39%	40%	38%	46%	32%	41%
Marion	52%	49%	59%	56%	60%	63%	62%	66%	65%	65%
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	55%	51%	57%	54%	57%	58%	60%	64%	63%	64%
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>

3. Innovation & Economic Development

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

Gross domestic product is the market value of all goods and services produced within the area during the year. As shown in Table 2.4, 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. Twelve of the 13 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.

Table 2.4

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

Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
	Year									
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
Levy	0.51	0.51	0.55	0.59	0.63	0.61	0.61	0.58	0.56	0.58
Madison	0.29	0.28	0.27	0.28	0.31	0.29	0.28	0.28	0.28	0.29
Marion	5.75	6.01	6.45	6.89	7.44	8.22	8.14	7.83	7.24	7.54
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	17.78	18.32	18.88	20.30	21.62	22.72	22.72	22.29	21.49	22.18
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

b. Tourism Development Tax Collections

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 as shown in Table 2.5 , 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 2.5

Tourism Development Tax Collections
North Central Florida Region and State
Thousands of Dollars, 2000-02 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
Levy	$0	$0	$52	$135	$139	$162	$170	$168	$147	$155
Madison	$43	$42	$49	$68	$78	$87	$95	$86	$80	$70
Marion	$0	$0	$0	$0	$489	$1,129	$1,131	$1,074	$886	$793
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	$2,094	$2,407	$3,126	$4,097	$4,422	$4,461	$3,908	$3,957
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.

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

C. Trade Exports and Imports

As shown in Table 2.6, 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 exported almost 16 percent more goods and services than it imported, while in 2010, the ratio of exports to imports reversed. The region imported almost 16 percent more goods and services than it exported. While to total value of exported goods increased 22 percent between 2001 and 2010, the total value of imported goods increased by 95 percent, representing a significant leakage of capital from the region.

Table 2.6

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
Levy	0.47	0.47	0.50	0.54	0.61	0.57	0.59	0.54	0.50	0.53
Madison	0.33	0.32	0.29	0.32	0.36	0.32	0.27	0.27	0.27	0.29
Marion	5.10	5.33	5.56	5.86	6.44	6.85	6.81	6.37	5.85	6.20
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	$14.54	$15.08	$15.46	$16.19	$17.60	$18.11	$18.29	$17.69	$16.85	$17.73
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

As shown in Table 2.7, from 2001 to 2010 the value of Trade Imports in the region increased by $11.9 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 2.7

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
Levy	Billions c	$0.97	$0.96	$1.02	$1.08	$1.15	$1.15	$1.17	$1.11	$1.04
Madison	$0.47	$0.46	$0.45	$0.48	$0.51	$0.48	$0.46	$0.46	$0.46	$0.49
Marion	Billions c	$7.24	$7.46	$7.88	$8.53	$9.20	$9.64	$9.69	$9.11	$8.54
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	$20.99	$21.25	$22.74	$24.25	$25.20	$25.94	$25.57	$24.39	$24.46
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

4. Infrastructure & Growth Leadership

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 2.8, the population of the region increased by nearly 20 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 increase by 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 2.8

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
Levy	34,450	37,985	40,801	43,600	46,900	50,200	53,200	55,900	58,500
Madison	18,733	19,696	19,224	19,400	19,500	19,600	19,800	19,900	20,000
Marion	258,916	304,926	331,298	363,000	399,000	434,400	468,200	499,600	529,100
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	728,810	821,369	871,396	952,600	1,019,300	1,084,400	1,146,600	1,204,100	1,257,900
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

b. Annual Building Permits

As shown in Table 2.9-8, 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 levels experienced in other areas of the state. Consequently, when the housing market collapsed, the region did not experience as dramatic a decline as the state as a whole. By 2010, building permit activity in the region as well as statewide had returned to a positive trend.

Table 2.9

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	2,335	1,791	1,684	2,009	2,293	1,949	1,388	1,006	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
Levy	193	137	156	225	386	278	213	101	83	56
Madison	75	55	67	66	76	89	54	48	32	27
Marion	3,171	6,161	6,475	5,426	7,453	7,063	3,035	1,139	394	481
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	6,545	8,885	9,239	8,738	11,609	10,637	5,606	2,812	1,290	1,324
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

C. Vehicle Miles Traveled

As shown in Table 2.10, 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 2.10

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
Levy	1.58	1.64	1.60	1.67	1.71	1.66	1.65	1.64	1.60	1.62
Madison	1.48	1.52	1.50	1.47	1.58	1.57	1.55	1.47	1.48	1.52
Marion	9.57	9.71	10.35	11.70	11.85	11.81	11.91	11.40	11.28	11.07
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	31.07	31.79	33.08	34.75	35.83	35.69	36.07	34.55	34.08	33.84
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>

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

5. Business Climate & Competitiveness

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 2.11, 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 2.11

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%
Levy	5.1%	5.8%	5.3%	4.6%	3.7%	3.5%	4.1%	6.9%	11.1%	12.0%
Madison	5.0%	5.2%	5.0%	5.2%	4.6%	5.0%	5.9%	6.8%	10.4%	11.4%
Marion	5.0%	5.9%	5.4%	4.6%	3.7%	3.4%	4.4%	7.7%	12.4%	13.4%
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	4.5%	5.0%	4.6%	4.1%	3.4%	3.1%	3.7%	6.0%	9.6%	10.6%
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>

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

b. Employment by Industry

As shown in Tables 2.12 and 2.13, Health Care, retail trade, state government and local government have remained the predominant employment industries from 2001 to 2010 in the region. On a percentage basis, the largest gains during the period were experienced in Management (149%), Educational Services (57.4%), and Federal Civilian (42%). Private sector industries that posted significant employment gains over the period on an absolute basis include Health Care and Social Assistance (9,502 jobs), Real Estate Rental and Leasing (4,529 jobs) and Accommodation and Food Services (3,569 jobs). Declines occurred in the Manufacturing (-4,173 jobs), State Government, (-2,726 jobs) and Retail Trade (-1,732 jobs) industries.

Table 2.13

Employment by Industry
North Central Florida Region
2001 to 2010

Industry	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Health Care and Social Assistance	37,005	37,662	39,564	40,451	41,736	44,155	45,471	46,585	45,811	46,507
Retail Trade	44,883	44,469	44,264	45,630	47,603	48,746	50,268	46,847	44,392	43,151
State Government	42,197	40,259	38,213	42,008	41,835	41,773	41,080	39,546	39,784	39,471
Local Government	33,367	33,712	34,137	35,042	35,616	36,240	36,802	36,943	36,512	36,659
Accommodation and Food Services	23,181	24,039	25,269	26,443	27,437	27,873	29,319	29,775	27,425	26,750
Other Services, except Public Administr	19,242	20,714	21,329	22,008	21,850	22,344	23,299	22,640	22,005	21,372
Manufacturing	23,614	22,804	23,026	24,012	24,927	25,558	25,157	23,068	19,357	19,441
Construction	20,697	21,753	23,702	26,371	28,850	31,439	30,259	26,331	21,588	19,211
Professional, Scientific, and Technical S	14,612	15,481	15,984	17,069	18,231	18,561	19,619	18,977	18,202	17,834
Administrative and Waste Managemen	16,781	15,908	17,923	19,622	19,214	19,233	19,036	18,243	17,854	17,658
Real Estate and Rental and Leasing	12,197	12,647	13,429	15,373	17,755	19,008	18,474	17,793	16,765	16,726
Finance and Insurance	11,900	12,637	12,621	12,879	13,244	14,152	15,481	16,184	16,028	14,776
Farming	11,957	11,522	11,451	11,098	10,674	10,590	12,241	12,074	11,890	12,081
Transportation and Warehousing	7,596	8,741	8,496	8,198	8,515	10,200	10,814	11,516	10,467	10,433
Wholesale Trade	7,951	8,337	8,930	9,389	10,148	10,323	10,873	10,304	9,790	9,261
Federal Civilian	5,263	5,447	5,520	5,611	5,798	5,877	6,063	6,322	6,588	7,474
Arts, Entertainment, and Recreation	5,491	5,274	5,570	6,178	6,736	6,914	7,262	7,331	7,262	7,314
Educational Services	3,670	4,057	4,541	4,716	5,246	5,546	5,470	6,203	6,354	5,778
Forestry, Fishing, and Related Activities	4,167	4,490	4,449	4,927	5,269	5,356	5,557	5,380	5,889	5,591
Information	5,167	5,111	4,898	4,935	5,918	5,798	5,665	5,605	4,931	4,710
Federal Military	1,723	1,750	1,760	1,618	1,621	1,743	1,794	1,784	1,819	1,831
Management of Companies and Enterp	564	523	485	535	636	673	693	1,180	1,164	1,406
Utilities	1,070	878	942	1,205	1,285	1,259	1,271	1,231	1,268	1,256
Mining	589	391	442	673	519	635	553	899	637	649

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties v1.7. U.S. Bureau of Economic Analysis Data
Source:

Table 2.13

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	355	359	367	386	401	414	423	413	394	387
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	275	277	283	301	313	322	328	316	299	292
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	80	82	84	85	87	92	95	97	95	95
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 v1.7, U.S. Bureau of Economic Analysis Data

Table 2.14 demonstrates that over the 2001 to 2010 period, public sector employment as a percent of total employment in the region increased from 22.5 percent in 12001 to 24.6 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.

Table 2.14

Percent Employment by Sector
North Central Florida Region
2001 to 2010

	Year									
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Percent Private Sector Employment-Region	77.5%	77.2%	77.1%	77.9%	78.2%	77.7%	77.5%	76.5%	76.0%	75.4%
Percent Public Sector Employment-Region	22.5%	22.8%	22.9%	22.1%	21.8%	22.3%	22.5%	23.5%	24.0%	24.6%
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 v1.7, U.S. Bureau of Economic Analysis Data

C. Wages by Industry

As shown in Table 2.15, the majority of industries experienced stable wage growth from 2001 to 2010. Fifteen 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 Utilities, Federal Military, Mining as well as State and Local Government. Eight industries had overall declining average annual wages for the period. These were Forestry, Fishing and Related Activities; Retail Trade; Other Services, Except Public Administration; Real Estate, Rental and Leasing; Administrate and Waste Management Services, Transportation and Warehousing; Information; Finance and Insurance; as well as Management of Companies and Enterprises.

Table 2.15

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
Utilities	$37.9	$45.2	$48.6	$53.6	$53.9	$53.3	$53.2	$57.2	$60.9	$62.3
Federal Civilian Average Annual Wage R	$45.5	$45.9	$50.1	$54.1	$55.7	$58.0	$60.3	$60.9	$62.7	$60.3
Manufacturing	$30.7	$32.3	$33.9	$35.7	$37.3	$39.2	$39.5	$40.9	$41.8	$42.9
Mining	$26.4	$33.1	$26.9	$29.2	$28.1	$24.6	$23.9	$13.6	$15.4	$40.7
State and Local Government Average An	$28.0	$29.5	$29.9	$32.8	$34.1	$36.0	$37.5	$38.9	$39.8	$40.5
Wholesale Trade	$30.4	$31.2	$33.7	$35.7	$37.0	$38.9	$39.0	$39.5	$38.9	$40.3
Health Care and Social Assistance	$28.9	$29.8	$30.8	$32.3	$33.7	$34.9	$35.8	$37.0	$38.0	$37.4
Information	$30.4	$30.4	$31.1	$33.0	$32.3	$33.8	$34.2	$34.3	$34.6	$34.1
Federal Military Average Annual Wage R	$15.3	$18.2	$22.8	$25.1	$28.3	$27.1	$27.8	$30.3	$32.7	$30.7
Management of Companies and Enterpri	$37.5	$33.8	$40.9	$43.6	$46.8	$45.6	$46.9	$37.7	$37.5	$30.6
Finance and Insurance	$28.9	$29.7	$30.9	$32.4	$33.6	$35.2	$34.1	$32.4	$29.6	$29.0
Professional, Scientific, and Technical Se	$22.1	$22.9	$24.1	$23.4	$25.5	$27.5	$27.2	$28.4	$28.0	$28.9
Construction	$19.5	$19.5	$20.5	$21.9	$23.5	$25.3	$25.8	$25.9	$24.5	$25.3
Retail Trade	$17.2	$17.6	$18.3	$19.0	$19.8	$20.6	$20.6	$20.7	$20.6	$21.2
Transportation and Warehousing	$18.9	$18.7	$19.3	$20.3	$20.8	$20.4	$21.1	$22.2	$21.7	$21.0
Forestry, Fishing, and Related Activities	$14.7	$14.2	$16.3	$16.1	$16.9	$18.6	$18.5	$19.6	$17.6	$18.6
Other Services, except Public Administra	$14.8	$15.0	$15.6	$16.3	$16.6	$17.4	$17.6	$18.2	$17.9	$18.1
Arts, Entertainment, and Recreation	$12.3	$12.4	$11.9	$12.2	$14.1	$13.8	$14.8	$15.5	$15.6	$16.3
Educational Services	$10.7	$10.8	$11.5	$11.9	$11.8	$12.0	$12.6	$12.6	$12.8	$15.0
Accommodation and Food Services	$11.5	$11.5	$12.4	$12.8	$13.4	$14.0	$14.4	$14.4	$14.5	$14.8
Administrative and Waste Management S	$13.6	$14.0	$14.3	$14.7	$15.5	$15.2	$15.1	$15.6	$15.0	$14.8
Real Estate and Rental and Leasing	$7.7	$7.4	$7.2	$6.8	$7.0	$7.5	$7.6	$7.9	$7.7	$7.9
Farm Average Annual Wage Rate	$4.5	$4.7	$4.1	$5.2	$5.1	$5.9	$5.1	$6.0	$6.0	$6.2

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.7, U.S. Bureau of Economic Analysis Data

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

As shown in Table A-2.16, average annual wages in the region continue to lag those of the state in both public as well as private sector employment. The gap between state and regional average annual wages did, however, narrow from 2001 to 2010 in both public and private sector employment.

Table 2.16

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	$21.8	$22.4	$23.1	$24.4	$25.4	$26.6	$27.0	$27.7	$27.8	$28.3
Total Avg An Wage Rate - State	$27.0	$27.5	$28.3	$29.4	$30.6	$31.8	$32.3	$32.7	$32.3	$32.7
Priv Sctr Avg An Wage Rate - Region	$20.4	$20.8	$21.6	$22.3	$23.4	$24.4	$24.7	$25.1	$24.8	$25.2
Priv Sctr Avg An Wage Rate - State	$26.0	$26.4	$27.1	$28.0	$29.2	$30.4	$30.8	$31.0	$30.3	$30.8
Pub Sctr Avg An Wage Rate - Region	$28.9	$30.4	$31.1	$34.1	$35.4	$37.4	$38.9	$40.4	$41.4	$42.0
Pub Sctr Avg An Wage Rate - State	$34.8	$36.6	$38.5	$40.5	$42.0	$43.5	$45.1	$46.6	$47.5	$47.8

Source: Regional Economic Modeling, Inc., Policy Insite+, Florida Counties, v1.7, U.S. Bureau of Economic Analysis Data

6. Civic & Governance Systems

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 2.17, millage rates across the region shared a 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 2.17

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
Levy	18.75	18.13	22.23	17.44	16.92	15.61	14.96	15.16	15.17	15.07
Madison	18.95	18.97	19.11	19.11	16.88	16.01	14.79	16.13	17.33	17.84
Marion	16.02	15.94	26.18	13.58	12.88	12.44	11.10	11.39	11.38	11.38
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	18.95	18.49	19.89	18.20	17.78	17.34	16.29	16.41	16.92	16.89
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>

b. Registered Nonprofit Organizations

As shown in Table 2.18, 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 60 percent compared with over 70 percent for the state.

Table 2.18

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
Levy	68	75	84	89	88	91	103	111	115	123
Madison	42	40	54	56	58	57	61	66	67	74
Marion	452	485	546	588	602	637	666	687	746	789
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	1,790	1,896	2,134	2,261	2,312	2,415	2,515	2,559	2,734	2,867
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

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

C. Voter Participation

As shown in Table 2.19, 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 2.19

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%
Levy	72.3%	56.6%	74.0%	47.4%	72.8%	51.9%
Madison	64.0%	55.8%	73.4%	52.3%	73.0%	55.5%
Marion	71.8%	59.1%	76.2%	50.8%	76.1%	54.4%
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	69.0%	56.5%	75.8%	49.0%	76.7%	52.2%
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=>

7. Quality of Life & Quality Places

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 2.20 , per capita incomes in the region grew across all counties from 2001 to 2010. Eight of the 13 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 2.20

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
Levy	$22,975	$22,182	$22,476	$23,593	$24,482	$24,643	$24,668	$24,455	$24,436	$24,577
Madison	$20,360	$20,274	$20,152	$21,229	$21,764	$21,673	$21,979	$22,328	$22,564	$23,108
Marion	$26,960	$26,688	$27,076	$28,072	$28,995	$30,171	$30,444	$29,792	$29,351	$29,534
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

b. House Price Cost Index

As shown in Table 2.21, housing prices in the region as well as the state remained a bargain relative to national home prices. With the exception of Alachua, Levy and Marion Counties, 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 2.21

**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
Levy	0.72	0.72	0.74	0.77	0.87	0.90	0.83	0.76	0.70	0.71
Madison	0.36	0.36	0.37	0.38	0.43	0.45	0.41	0.38	0.35	0.35
Marion	0.69	0.69	0.71	0.74	0.83	0.86	0.79	0.72	0.67	0.68
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	0.54	0.54	0.55	0.55	0.58	0.62	0.60	0.59	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

C. Persons Living in Poverty

As shown in Table 2.22, 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 3.6 percent points in 2001 to 5.7 percentage points 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 2.22

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%
Levy	17.9%	17.1%	16.4%	15.0%	19.4%	17.8%	18.5%	17.8%	21.8%	27.0%
Madison	20.5%	19.8%	18.5%	17.7%	23.8%	20.9%	21.0%	23.6%	26.2%	23.4%
Marion	14.9%	14.8%	14.0%	12.2%	13.6%	12.2%	13.0%	16.0%	15.9%	19.6%
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	16.2%	16.0%	15.6%	14.0%	17.8%	17.1%	17.3%	18.5%	19.8%	22.2%
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/>

B. Problems, Needs and Opportunities

1. 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 and summarize the problems, needs and opportunities of the region. Additionally, future U.S. Economic Development Administration 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 Opportunity 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.

C. Goals and Objectives

The Economic Development Element establishes the goals and policies necessary to solve the economic problems and capitalize on the resources of the region. The goals and policies are organized using the Florida Chamber Foundation's Six Pillars of Florida's Future Economy.

1. Talent Supply & Education

Regional Goal 2.1. Connect and align education and workforce development programs to develop the region's current and future talent supply chain and meet employer needs.

Regional Indicator

For the 2010- 2011 school year, the high school graduation rate of the region was 77.1 percent.

Policy 2.1.1. Expand options for high school students to become industry certified while still in high school, as an alternative to college path.

Policy 2.1.2. Integrate education, training and workforce development to develop a strong supply chain.

Policy 2.1.3. 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.

Policy 2.1.4. Support the creation of electronic medical records education and training programs utilizing a regional community-adaptive health information technology model.

Regional Goal 2.2 Expand access to education and training programs for talent in distressed markets (e.g., rural, urban core) throughout the region.

Policy 2.2.1. Support the creation of online and distance learning programs for students that lack other means of attaining necessary training.

Policy 2.2.2. Support the development of educational programs to increase the labor force in the healthcare and life sciences industry.

2. Innovation & Economic Development

Regional Goal 2.3. Grow, sustain and integrate efforts related to research and development, technology commercialization, and seed capital, to create, nurture and expand regional innovation businesses.

Regional Indicator

In 2010, there were 17,834 jobs in the region in the Professional, Scientific, and Technical Enterprises industry.

Policy 2.3.1. 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.

Policy 2.3.2. Support the development of existing and new business incubators and accelerators throughout the region.

Regional Goal 2.4. Increase the number of regional businesses engaged in selling goods and services internationally and the diversification of the markets they serve.

Regional Indicators

In 2010, the region experienced a net trade export deficit of goods and services of $230 million.

Policy 2.4.1. Provide educational opportunities to regional businesses interested in international trade on the advantages of exporting their goods and services.

Regional Goal 2.5. Brand and market the north central Florida region as the best location for business.

Regional Indicator

As of January 2016, the North Central Florida Regional Planning Council was a member of the North Florida Economic Development Partnership.

Policy 2.5.1. Support the North Florida Economic Development Partnership asset mapping and geographic information system projects in the region.

Policy 2.5.5. 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.

Regional Goal 2.6. Promote the continued viability of military installations in close proximity to the region.

Regional Indicator

As of January 2016 the North Central Florida Regional Planning Council continues to review local government comprehensive plans, plan amendments, and other items for adverse impacts to military installations either within or in close proximity to the region.

Policy 2.6.1. Improve collaboration between local government and military leaders to utilize best management practices that ensure successful economic partnerships.

Policy 2.6.2. Support the development of the catalyst sites for the North Central Florida Rural Area of Opportunity.

Policy 2.6.3. Support the development and expansion of regional business incubators and research parks.

3. Infrastructure & Growth Leadership

Regional Goal 2.7. Modernize the transportation, telecommunications, energy, water and wastewater systems of the region to meet future demand and respond to changing business needs.

Regional Indicator

As of 2010, the nonresidential actual capital stock of the region was valued at $26.1 billion.

Policy 2.7.1. Support the development of diverse, reliable and cost effective energy sources and systems to meet the region's economic and environmental goals.

Policy 2.7.2. 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.

Policy 2.7.3. Develop and maintain multimodal, interconnected trade, logistics and transportation systems to enhance freight mobility in support of a prosperous, competitive economy.

Policy 2.7.4. 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.

Regional Goal 2.8. Improve coordination of economic development, land use, infrastructure, water, energy, natural resources, workforce and community development decision-making and investments at the regional level.

Regional Indicator

> **As of January 2016, the North Central Florida Regional Planning Council continues to review local government comprehensive plans, applications for federal funds and direct federal actions for adverse impacts to Natural Resources of Regional Significance, regional facilities, and affected local governments.**

Policy 2.8.1. Improve collaboration and alignment between regional and local agencies and business leaders through a regional vision.

Policy 2.8.2. Support continuing improvements to multi-modal infrastructure, including highway interchanges along interstate corridors, railway corridors, airport facilities and broadband infrastructure.

Policy 2.8.3. Identify economic development projects that may qualify for federal and state funding opportunities and provide grant writing and administrative services where needed.

Policy 2.8.4. Provide technical assistance in the form of economic impacts analysis, research and best practices to local economic development organizations and government agencies.

Policy 2.8.5. Facilitate coordination between regional economic development strategies and the state five-year economic development plan.

4. Business Climate & Competitiveness

Regional Goal 2.9. 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.

Regional Indicator

> **As of January 2016, the North Central Florida Strategic Regional Policy Plan contains goals and policies encouraging the streamlining of permitting and regulatory processes.**

Policy 2.9.1. Reduce barriers to small business and entrepreneurial growth.

Policy 2.9.2. Develop a government revenue structure that encourages business growth and development.

Regional Goal 2.10. Ensure local government agencies provide collaborative, seamless, consistent and timely customer service to regional businesses.

Regional Indicator

> **As of January 2016, the North Central Florida Strategic Regional Policy Plan contains goals and policies encouraging the streamlining of permitting and regulatory processes.**

Policy 2.10. 1. Work with water management districts in the region to simplify permitting process for new and expanding businesses.

Regional Goal 2.11. Expand opportunities for access to capital for businesses throughout their life cycle.

Regional Indicator

> **As of January 2016, the Council reviews applications for federal grants and loans.**

Policy 2.11.1. Create a database of capital sources available to regional businesses.

5. Civic & Governance Systems

Regional Goal 2.12. Support and sustain regional partnerships to accomplish the region's economic and quality of life goals.

Regional Indicators

1. **As of January 2016, the North Central Florida Regional Planning Council is a member of the North Florida Economic Development Partnership as well as the Florida Economic Council.**

2. **As of January 2016, the North Central Florida Regional Planning Council serves as staff to the Metropolitan Transportation Planning Organization for the Gainesville Urbanized Area, the North Central Florida Comprehensive Economic Development Strategy Committee and The Original Florida Tourism Task Force.**

Policy 2.12.1. 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.

Policy 2.12.2. 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.

Policy 2.12.3. Invest in strategic regional economic development priorities.

Policy 2.12.4. Support programs to educate local government officials in the fundamentals of economic development

Policy 2.12.5. 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.

Policy 2.12.6. Support the North Florida Economic Development Partnership and the development of the North Central Florida Rural Area of Opportunity Catalyst Sites in Columbia and Suwannee Counties by serving on the Partnership's Board of Directors and providing technical assistance when necessary.

6. Quality of Life & Quality Places

Regional Goal 2.13. 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.

Regional Indicator

> **As of January 2016, the North Central Florida Regional Planning Council continues to review local government comprehensive plans, applications for federal funds and direct federal actions for adverse impacts to Natural Resources of Regional Significance, regional facilities, and affected local governments.**

Policy 2.13.1. Create and sustain vibrant, healthy communities that attract workers, businesses, residents and visitors to the region.

Policy 2.13.2. Promote and incentivize local government in the development of vibrant city centers.

Regional Goal 2.14. Promote, develop, and leverage the region's natural and cultural assets in a sustainable manner.

Regional Indicator

> **As of January 2016, the North Central Florida Regional Planning Council provides staff services to The Original Florida Tourism Task Force.**

Policy 2.14.1. 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.

Policy 2.14.2. 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.

Policy 2.14.3. Promote and support the state parks within the region and improve branding and awareness of the parks as a tourist destination.

Policy 2.14.4. 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.