North Central Florida Comprehensive Economic Development Strategy

2018-2022

North Central Florida
Regional Planning Council

September 2017

North Central Florida Regional Planning Council

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Table of Contents

Executive Summary ... ix
Comprehensive Economic Development Strategy ... 3

A. Background ... 3
B. Goals and Objectives ... 8
C. Plan of Action ... 16
D. Strategic Projects, Programs and Activities - ... 17

Vital Project Areas of the North Central Florida Economic Development District ... 17
Appendix - Technical Report: ... 21

A. Analysis of Economic Development Problems and Opportunities ... 21
B. Performance Measures ... 96
C. Six Pillars Measures ... 97
D. Community and Private Sector Participation ... 118

Tables

Table A-1 Average Wages per Job:
North Central Florida Region and State 2006 to 2015 22
Table A-2 High School Graduation Rates:
North Central Florida Region and State School Years 2005-06 to 2014-15 24
Table A-3 Eighth Grade Math Performance:
North Central Florida Region and State 2006 to 2015 26
Table A-4 Gross Domestic Product:
North Central Florida Region and State Billions of Fixed 2009 Dollars 2006 to 2015 30
Table A-5 Tourism Development Tax Collections:
North Central Florida Region and State Thousands of Dollars 2005-06 to 2014-15 32
Table A-6a Trade Exports:
North Central Florida Region and State Billions of Fixed 2009 Dollars 2006 to 2015 34
Table A-6b Trade Imports:
North Central Florida Region and State Billions of Fixed 2009 Dollars 2006 to 2015 36
Table A-7 Population Counts, Estimates and Projections:
North Central Florida Region and State 2010 to 2045 40
Table A-8 Annual Building Permits:
North Central Florida Region and State Residential Units 2006 to 2015 42
Table A-9 Daily Vehicle Miles Traveled:
North Central Florida Region and State Millions of Miles 2006 to 2015 44
Table A-10 Average Annual Unemployment Rates:
North Central Florida Region and State 2006 to 2015 48
Table A-11a Employment by Industry:
North Central Florida Region 2006 to 2015 50
Table A-11b Employment by Sector:
North Central Florida Region and State 2006 to 2015 52
Table A-12a Average Annual Wages by Industry:
North Central Florida Region Thousands of Current Dollars 2006 to 2015 54
Table A-12b Average Annual Wages by Sector:
North Central Florida Region and State Thousands of Current Dollars 2006 to 2015 56
Table A-13 Millage Rates:
North Central Florida Region and State 2006 to 2015 60
Table A-14 Registered 501(c)3 Organizations Public and Private Foundation Charities:
North Central Florida Region and State 2006 to 2015 62
Table A-15 Voter Participation:
North Central Florida Region and State Biennial General Elections 2006 to 2016 64
Table A-16 Real Personal Per Capita Income:
North Central Florida Region and State Fixed 2009 Dollars 2006 to 2015 68
Table A-17 Relative Housing Price:
North Central Florida Region and State National Index = 1.0 2006 to 2015 70
Table A-18 Percent of Persons Living in Poverty:
North Central Florida Region and State 2006 to 2015 72
Table A-19 Shift-Share Analysis:
North Central Florida Region Top 10 Projected Industry Employment Gains 2015 to 2035 76
Table A-20 Employment Share Change:
North Central Florida Region 2015 to 2035 77
Table A-21 Employment Mix Change:
North Central Florida Region 2015 to 2035 78

Table A-22 Employment Shift Change:
North Central Florida Region 2015 to 2035 79
Table A-23 Location Quotient Analysis:
North Central Florida Region 2015 to 2035 82

Illustrations

Illustration A-1 Average Wages per Job:
North Central Florida Region and State 2006 to 2015 23
Illustration A-2 High School Graduation Rates:
North Central Florida Region and State School Years 2005-06 to 2014-15....25
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 2006 to 2015 27
Illustration A-4 Gross Domestic Product:
North Central Florida Region and State Billions of Fixed 2009 Dollars 2006 to 2015....31
Illustration A-5 Tourism Development Tax Collections:
North Central Florida Region and State Thousands of Dollars 2005-06 to 2014-15 33
Illustration A-6a Trade Exports:
North Central Florida Region and State Billions of Fixed 2009 Dollars 2006 to 2015....35
Illustration A-6b Trade Imports:
North Central Florida Region and State Billions of Fixed 2009 Dollars 2006 to 2015....37
Illustration A-7 Population Counts, Estimates and Projections:
North Central Florida Region and State 2010 to 2045 41
Illustration A-8 Annual Building Permits:
North Central Florida Region and State Residential Units 2006 to 2015....43
Illustration A-9 Daily Vehicle Miles Traveled:
North Central Florida Region and State Millions of Miles 2006 to 2015 45
Illustration A-10 Average Annual Unemployment Rates:
North Central Florida Region and State 2006 to 2015 49
Illustration A-11a Employment by Industry:
North Central Florida Region 2006 to 2015 51
Illustration A-11b Employment by Sector:
North Central Florida Region and State 2006 to 2015 53
Illustration A-12a Average Annual Wages by Industry:
North Central Florida Region Thousands of Current Dollars 2006 to 2015 55
Illustration A-12b Average Annual Wages by Sector:
North Central Florida Region and State Thousands of Current Dollars 2006 to 2015 57
Illustration A-13 Millage Rates:
North Central Florida Region and State 2006 to 2015 61
Illustration A-14 Registered 501(c)3 Organizations Public and Private Foundation Charities:
North Central Florida Region and State 2006 to 2015 63
Illustration A-15 Voter Participation:
North Central Florida Region and State Biennial General Elections 2006 to 2015 65
Illustration A-16 Real Personal Per Capita Income:
North Central Florida Region and State Fixed 2009 Dollars 2006 to 2015 69
Illustration A-17 Relative Housing Price:
North Central Florida Region and State National Index = 1.0 2006 to 2015 71
Illustration A-18 Percent of Persons Living in Poverty:
North Central Florida Region and State 2006 to 2015 73
Illustration A-19 Shift-Share Analysis:
North Central Florida Region 2015 to 2035 75
Illustration A-20 Location Quotient Analysis:
North Central Florida Region 2015 81
Illustration C-1 Average Annual Wages per Job:
North Central Florida Region and State 2015 97

Illustration C-2 High School Graduation Rates:
North Central Florida Region and State School Year 2014-15 98
Illustration C-3 8th Grade Math Performance on the Florida Comprehensive Assessment Test:
North Central Florida Region and State 2015 99
Illustration C-4 Gross Domestic Product:
North Central Florida Region Billions of Fixed 2009 Dollars 2015 100
Illustration C-5 Tourism Development Tax Collections:
North Central Florida Region Thousands of Dollars Fiscal Year 2014-15 101
Illustration C-6a Trade Exports:
North Central Florida Region Billions of Fixed 2009 Dollars 2015 102
Illustration C-6b Trade Imports:
North Central Florida Region Billions of Fixed 2009 Dollars 2015 103
Illustration C-7 Population Counts, Estimates and Projections:
North Central Florida Region 2015 104
Illustration C-8 Annual Building Permits:
North Central Florida Region Residential Units 2015 105
Illustration C-9 Daily Vehicle Miles Traveled:
North Central Florida Region Millions of Miles 2015 106
Illustration C-10 Average Annual Unemployment Rates:
North Central Florida Region and State 2015 107
Illustration C-11a Employment by Industry:
North Central Florida Region 2015 108
Illustration C-11b Employment by Sector:
North Central Florida Region 2015 109
Illustration C-12a Average Annual Wages by Industry:
North Central Florida Region 2015 110
Illustration C-12b Average Annual Wages by Sector:
North Central Florida Region 2015 111
Illustration C-13 Millage Rates:
North Central Florida Region and State 2015 112
Illustration C-14 Registered 501(c)3 Organizations Public and Private Foundation Charities:
North Central Florida Region 2015 113
Illustration C-15 Voter Participation:
North Central Florida Region and State 2015 114
Illustration C-16 Real Personal Per Capita Income:
North Central Florida Region and State 2015 115
Illustration C-17 Relative Housing Price:
North Central Florida Region and State 2015 116
Illustration C-18 Percent of Persons Living in Poverty:
North Central Florida Region and State 2015 117

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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.

Commerce and Retail Center of Region, 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 resilient and 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 Gainesville Technology Entrepreneurship Center

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."

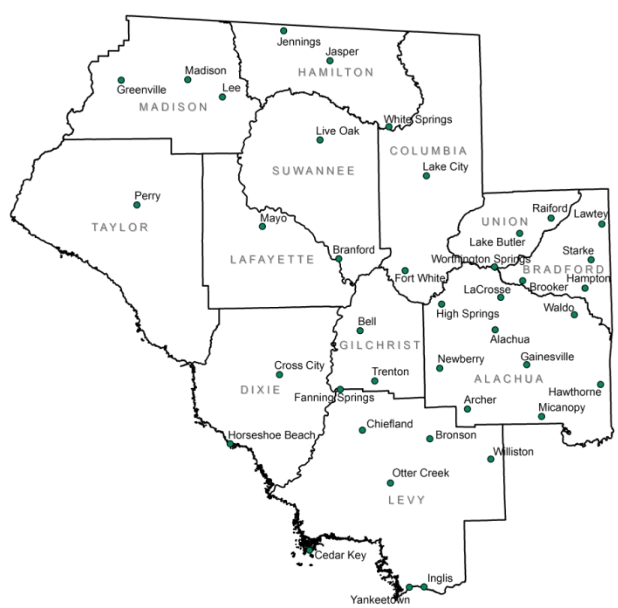
In addition to providing a cooperative framework for economic development coordination and planning, the Strategy also provides:

- 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 52 county and municipal governments. The 12 counties include Alachua, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Levy, Madison, Suwannee, Taylor and Union. The 38 municipalities include (by County): Alachua - Alachua, Archer, Gainesville, Hawthorne, High Springs, LaCrosse, Micanopy, Newberry and Waldo; Bradford - Brooker, Hampton,



North Central Florida Counties and Municipalities

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; Suwannee - Live Oak and Branford; Taylor - Perry; Union - Lake Butler, Raiford and Worthington Springs.

Suwannee River, Lafayette County

The North Central Florida Economic Development District has a total of 7,869 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 2015 Bureau of Economic and Business Research-estimated population of just over 540,000. Just under one-half of the population, 271,732, 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.

Forestry Products, Suwannee County & Taylor County

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.

Florida Gateway College, Lake City

North Central Florida Tropical Storms

The economy of the region is vulnerable to both natural and man-made disasters. Natural disasters include coastal storms, flooding, tornadoes and wildfires. Since over 95 percent of the drinking water source for the region is the Floridan Aquifer, the region is also susceptible to hazardous materials releases.

However, the most significant potential natural disaster facing the region is hurricanes and tropical storms. The 2011 North Central Florida Economic and Disaster Resiliency Study completed by the North Central Florida Regional Planning Council indicates that a Category 5 hurricane striking the region from the Gulf of Mexico could potentially result in a 46.6 percent loss to regional capital structure (building damage), a 38.8 percent regionwide job loss and a 34.0 percent population loss.

Each local government within the region has adopted an Comprehensive Emergency Management Plan which provides a detailed description of the process to be followed at the local level whenever an emergency or disaster occurs as a result of natural or manmade causes.

"The economy of the region is vulnerable to both natural and man-made disasters."

Hazardous Materials Training

Under contract with the Florida Division of Emergency Management, the North Central Florida Regional Planning Council serves as staff to the North Central Florida Local Emergency Planning Committee. The Committee is responsible for the preparation of local emergency response plans for hazardous materials releases for the district. In addition to the emergency response plan, the North Central Florida Local Emergency Planning Committee is also involved in establishing training programs, conducting emergency response exercises, providing public information campaigns and other activities aimed at minimizing risks from hazardous materials releases.

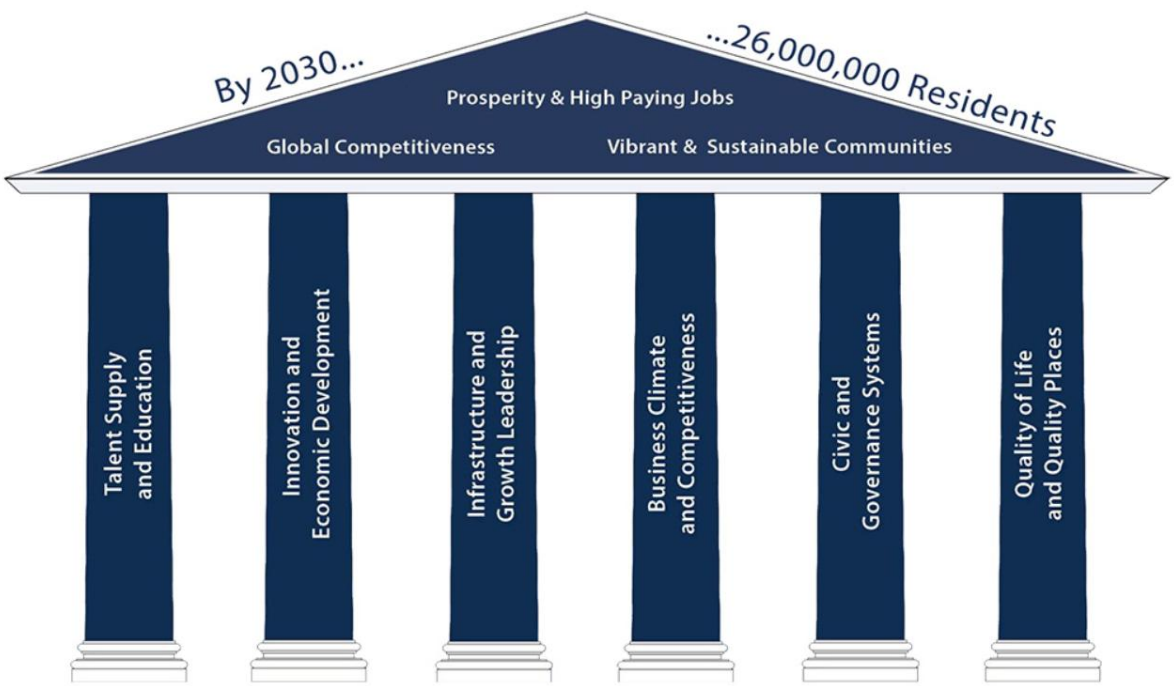
B. Goals and Objectives

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 SIX PILLARS OF THE FLORIDA ECONOMY



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

Comprehensive Economic Development Strategy (CEDS) for the North Central Florida Regional Planning Council (2018 -2022)

October 2017 - September 2022

Vision

- North central Florida will become the leading rural region within Florida by creating a business environment that is a viable alternative to the urban areas of Florida. The region will be recognized as one of the best places to live, learn, work and do business in the state and nation.

Goals

- Enhance the region's competitiveness as a location for business, investment, talent, innovation and tourism.
- Expand north central Florida's intermodal transportation and communication systems to enhances the region's economic growth and prosperity.
- Promote the region as a unique tourism destination, while preserving and enhancing the region's natural environment and quality of life.

Objectives

- Improve employment opportunities and resiliency in North Central Florida.
- Foster opportunities for prosperity.
- Grow local businesses.
- Expand global commerce.
- Increase north central Florida's attractiveness to employers, workers, residents and visitors.

Cross-Cutting Strategies

1. Strengthen collaboration and alignment among north central Florida's public, private and non-profit entities toward a shared economic vision.
2. Develop regional talent and innovation clusters using global best practices.
3. Position north central Florida as a globally competitive region by integrating economic development, infrastructure and other resources in support of regional economic development initiatives.
4. Diversify the regional economy by expanding existing industry clusters and supporting emerging innovation clusters.

Area-Specific Strategies

Talent Supply & Education	Innovation & Economic Development	Infrastructure & Growth Leadership	Business Climate & Competitiveness	Civic & Governance Systems	Quality of Life & Quality Places
1. Connect and align education and workforce development programs to develop the region's current and future talent supply chain and meet employer needs.	3. Grow, sustain and integrate efforts related to research and development, technology commercialization, and seed capital to create, nurture and expand regional innovation businesses.	7. Modernize the region's transportation, telecommunications, energy, water and wastewater systems to meet future demand and respond to changing business needs.	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.	13. Support and sustain regional partnerships to accomplish the region's economic and quality of life goals.	14. 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.
1.a. Expand options for high school students to become industry certified while still in high school, as an alternative to college path.	3.a. 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 and Progress Park in Alachua.	7.a. Support the development of diverse, reliable and cost effective energy sources and systems to meet the region's economic and environmental goals.	9.a. Reduce barriers to small business and entrepreneurial growth.	13.a. 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.	14.a. Create and sustain vibrant, healthy communities that attract workers, businesses, residents and visitors to the region.
1.b. Integrate education, training and workforce development to develop a strong supply chain.	3.b. Support the development of existing and new business incubators and accelerators throughout the region such as the Gainesville Technology Entrepreneurship Center, the Santa Fe Center for Innovation and Economic Development in Gainesville and the Sid Martin Biotechnology Incubator in Alachua.	7.b. 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.	9.b. Develop a government revenue structure that encourages business growth and development.	13.b. 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.	14.b. Promote and incentivize local government in the development of vibrant city centers.
1.c. 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.	3c. Support the development of existing and new industrial parks throughout the region such as Cornerstone n Gainesville.	7.c. Develop and maintain a cutting-edge telecommunications infrastructure by supporting initiatives to bring high-speed internet service to the rural areas of the region.	10. Ensure local government agencies provide collaborative, seamless, consistent and timely customer service to regional businesses.	13.c. Invest in strategic regional economic development priorities.	15. Promote, develop, and leverage the region's natural and cultural assets in a sustainable manner.
1. d. Support the creation of electronic medical records education and training programs utilizing a regional community-adaptive health information technology model.	4. Increase the number of regional businesses engaged in selling goods and services internationally and the diversification of the markets they serve.	7.d. Develop and maintain multimodal, interconnected trade, logistics and transportation systems to enhance freight mobility in support of a prosperous, competitive economy.	10.a. Work with water management districts in the region to simplify permitting process for new and expanding businesses.		15.a. 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.
2. Expand access to education and training programs for talent in distressed markets (e.g., rural, urban core) throughout the region.	4.a. Provide educational opportunities to regional businesses interested in international trade on the advantages of exporting their goods and services.	7.e. 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.	11. Expand opportunities for access to capital for businesses throughout their life cycle.		15.b. 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.
2.a. Support the creation of online and distance learning programs for students that lack other means of attaining necessary training.	5. Brand and market the north central Florida region as the best location for business.	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.	11.a. Create a database of capital sources available to regional businesses.		15.c. Promote and support the state parks within the region and improve branding and awareness of the parks as a tourist destination.
	5.a. Support the North Florida Economic Development Partnership asset mapping and geographic information system projects in the region.	8.a. Improve collaboration and alignment between regional/local agencies and business leaders through a regional vision.	12: To enhance the resilience of the North Central Florida economy in the face of natural disasters and changes to the national and state economies through increased awareness and preparation by businesses for environmental risks.		
	5.b. 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.				
	6. Promote the continued viability of military installations in close proximity to the region.				
	6.a. Improve collaboration between local government and military leaders to utilize best management practices that ensure successful economic partnerships.				

Priority Project Areas

Talent Supply & Education	Innovation & Economic Development	Infrastructure & Growth Leadership	Business Climate & Competitiveness	Civic & Governance Systems	Quality of Life & Quality Places
Support the development of educational programs to increase the labor force in the healthcare and life sciences industry.	Support the development of the catalyst sites for the North Central Florida Rural Area of Critical Economic Concern.	Support continuing improvements to multi-modal infrastructure, including highway interchanges along interstate corridors, railway corridors, airport facilities and broadband infrastructure.	Support streamlining processes at the local level to encourage new businesses to open and help existing businesses thrive.	Support programs to educate local government officials in the fundamentals of economic development.	Support regional tourism promotional initiatives.
	Support the development and expansion of regional business incubators and research parks.		Educate government and businesses on continuity and recovery plans in the event of natural or man-made disasters to address workforce retention and ensure access to loan and other assistance programs.		

1. Talent Supply & Education

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.

"Connect and align education and workforce."

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, Santa Fe College, CareerSource Crown, CareerSource North Florida and CareerSource North Central Florida 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 Infinity Hall, 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

"Integrate research and commercialization to nurture innovation."

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.

Objective 3.1 - Support development of the Innovation Square research and development park in Gainesville, 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 and Progress Park in Alachua.

Objective 3.2 - Support the development of existing and new business incubators and accelerators throughout the region such as the Gainesville Technology Entrepreneurship Center, the Santa Fe Center for Innovation and Economic Development in Gainesville and the Sid Martin Biotechnology Incubator in Alachua.

Objective 3.3 - Support the development of existing and new industrial parks throughout the region such as Cornerstone in Gainesville.

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.

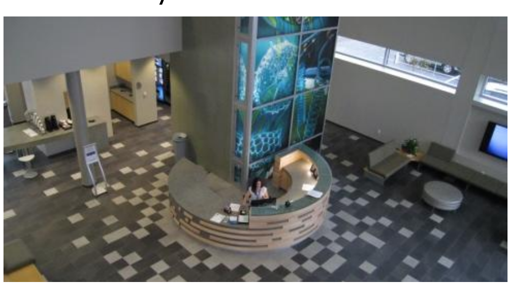
GOAL 5 - Brand and market the north central Florida region as the best location for business.

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.

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.



Florida Innovation Hub at the University of Florida, Gainesville

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 initiatives 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.

Interstate I-75 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.

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.

Goal 12: To enhance the resilience of the North Central Florida economy in the face of natural disasters and changes to the national and state economies through increased awareness and preparation by businesses for environmental risks.

Objective 12.1 Educate government and businesses on continuity and recovery plans in the event of natural or man-made disasters to address workforce retention and ensure access to loan and other assistance programs.

Innovation Hub Phase 2 Construction, Gainesville

5. Civic & Governance Systems

GOAL 13 - Support and sustain regional partnerships to accomplish the region's economic and quality of life goals.

"Support and sustain regional partnerships."

Objective 13.1 - 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 13.2 - 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 13.3 - Invest in strategic regional economic development priorities.

Suwannee County Courthouse, Live Oak

6. Quality of Life & Quality Places

GOAL 14 - 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 14.1 - Create and sustain vibrant, healthy communities that attract workers, businesses, residents and visitors to the region.

Objective 14.2 - Promote and incentivize local government in the development of vibrant city centers.

GOAL 15 - Promote, develop, and leverage the region's natural and cultural assets in a sustainable manner.

Objective 15.1 - 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.

Objective 15.2 - 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 15.3 - Promote and support the state parks within the region and improve branding and awareness of the parks as a tourist destination.

Bradford County Strawberry Festival, Starke

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 Opportunity Catalyst Sites in Columbia and Suwannee Counties by serving on the Partnership's Board of Directors and providing technical assistance when necessary.

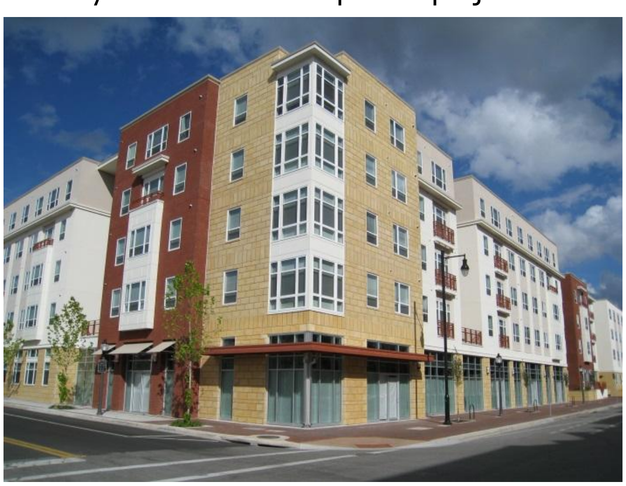
3. Promote sustainable economic development through regional tourism promotion, while encouraging the preservation of resources that bring visitors to the area. The North Central Florida Economic Development District will provide professional staffing services to the Original Florida Tourism Task Force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

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.



Downtown Redevelopment, Gainesville

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 Opportunity.

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.

b. Educate government and businesses on continuity and recovery plans in the event of natural or man-made disasters to address workforce retention and ensure access to loan and other assistance programs.

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.

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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 2015, Alachua County, which as the largest economy of any county in the region and with average annual wages over $43,500, is nearly $3,000 lower than state averages. In 2015, Lafayette County, with the lowest average annual wages in the region at just over $29,500, has a nearly $17,000 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

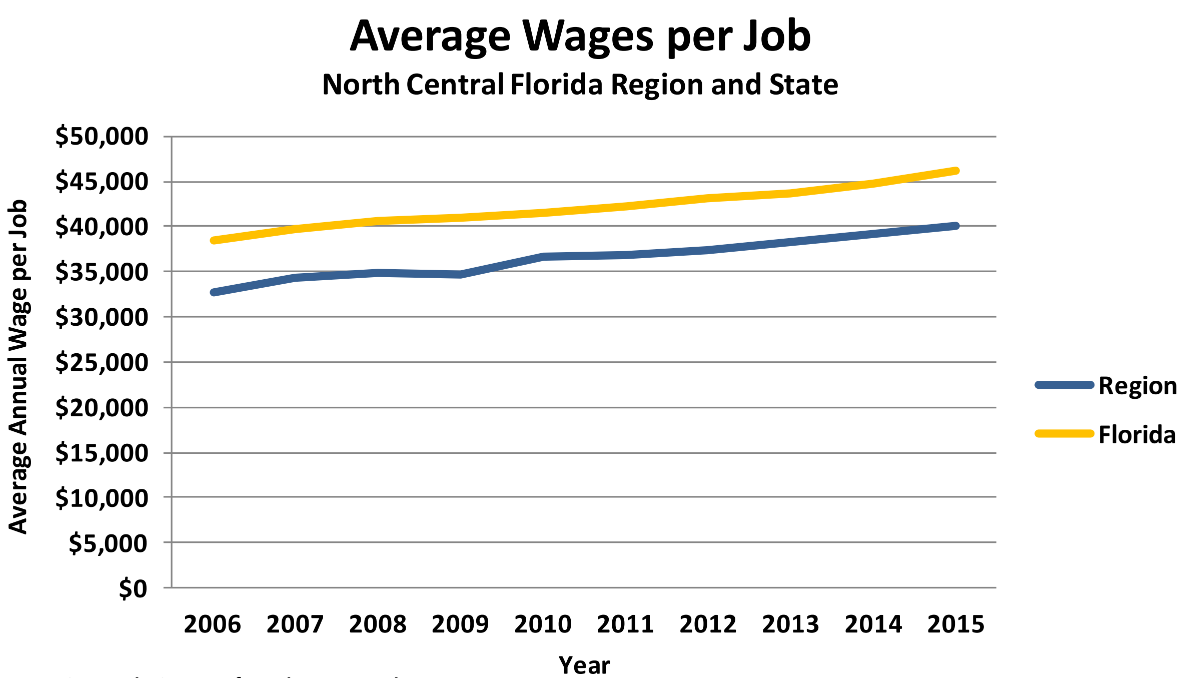
Average Wages per Job
North Central Florida Region and State
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	$34,759	$37,164	$37,463	$39,071	$39,670	$40,207	$40,773	$41,589	$42,701	$43,598
Bradford	$29,423	$30,031	$30,662	$30,873	$30,762	$30,831	$31,467	$32,678	$34,198	$35,783
Columbia	$31,357	$31,780	$32,135	$32,920	$33,986	$33,275	$33,535	$34,054	$34,897	$35,621
Dixie	$27,305	$27,371	$28,080	$27,941	$28,551	$28,641	$29,191	$29,422	$32,077	$32,110
Gilchrist	$27,370	$27,827	$29,789	$30,172	$29,933	$29,737	$30,018	$31,090	$31,880	$32,263
Hamilton	$36,515	$35,631	$36,723	$41,628	$39,133	$39,119	$40,287	$40,587	$41,824	$39,651
Lafayette	$25,730	$26,770	$27,378	$28,135	$28,134	$27,687	$28,781	$28,856	$29,648	$29,543
Levy	$26,158	$26,810	$27,639	$27,264	$27,616	$27,892	$28,491	$28,878	$29,233	$30,116
Madison	$26,050	$27,245	$27,966	$28,694	$29,119	$29,237	$29,605	$29,841	$31,476	$32,053
Suwannee	$27,131	$27,492	$28,365	$27,637	$28,141	$28,245	$28,871	$29,720	$30,421	$31,341
Taylor	$30,931	$33,077	$33,198	$33,701	$35,624	$36,470	$36,491	$37,593	$37,217	$40,717
Union	$31,609	$31,773	$31,993	$33,539	$33,411	$33,075	$33,744	$34,060	$34,270	$34,233
Region	$32,754	$34,391	$34,890	$34,771	$36,588	$36,882	$37,456	$38,210	$39,228	$40,102
Florida	$38,510	$39,775	$40,583	$40,989	$41,572	$42,312	$43,210	$43,651	$44,810	$46,236

Source: Florida Department of Economic Opportunity, Quarterly Census of Employment and Wages, 2006 - 2015 Annual Files <ttp://www.floridajobs.org/labor-market-information/data-center/statistical-programs/quarterly-census-of-employment-and-wages>

Illustration A-1

Average Wages per Job
North Central Florida Region and State
2006 to 2015



Source: Quarterly Census of Employment and Wages

b. High School Graduation Rates

As shown in Table A-2 and Illustration A-2, the regional High School Graduation Rate peaked in 2010-11 and gradually has declined ever since. Prior to the 2010-11 school year, graduation rates for the region were consistently higher than the state average. However, since the 2010-11 peak, graduations rates have trailed that of the state. In 2015, eight of the 12 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 since 2010-11, the overall trend line for the region is positive, improving from 70.8 percent in the 2005-06 school year to nearly 74.3 percent in 2014-15.

Table A-2

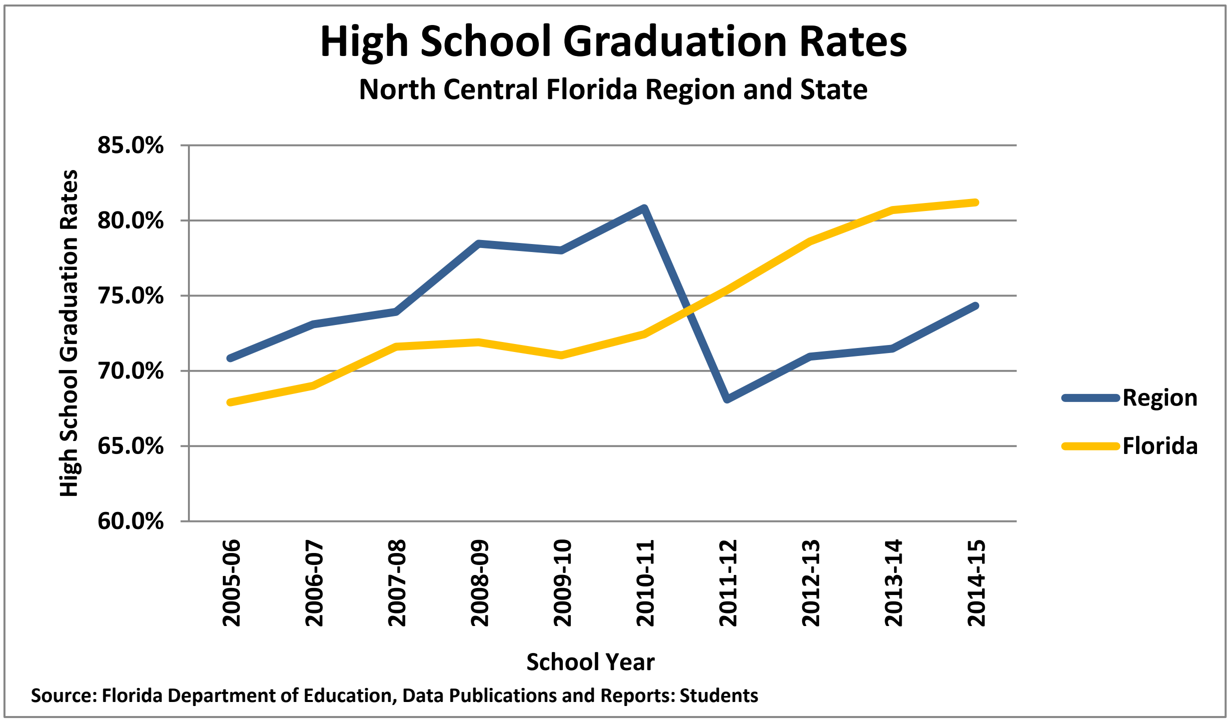
High School Graduation Rates
North Central Florida Region and State
School Years 2005-06 to 2014-15

Area	School Year									
	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Alachua	69.8%	68.2%	68.3%	77.1%	76.6%	78.1%	68.7%	72.6%	72.2%	74.3%
Bradford	69.5%	70.7%	75.4%	78.4%	71.1%	73.3%	73.7%	67.5%	71.3%	76.9%
Columbia	67.4%	74.1%	77.6%	87.8%	88.5%	87.2%	64.8%	65.7%	61.0%	71.0%
Dixie	70.0%	70.5%	66.5%	72.0%	69.0%	78.2%	77.1%	82.4%	87.8%	96.9%
Gilchrist	43.9%	53.3%	56.1%	64.2%	63.4%	67.6%	85.9%	89.7%	95.4%	94.0%
Hamilton	83.8%	85.1%	89.1%	89.5%	96.2%	95.8%	55.0%	55.5%	78.6%	73.7%
Lafayette	53.5%	64.2%	57.5%	62.8%	51.6%	58.0%	65.8%	87.5%	80.0%	87.0%
Levy	76.2%	79.0%	81.2%	81.0%	80.2%	85.8%	72.2%	77.8%	69.1%	81.6%
Madison	89.7%	90.7%	95.9%	93.8%	91.2%	84.0%	66.3%	64.0%	75.7%	58.1%
Suwannee	65.1%	74.4%	71.6%	72.4%	74.5%	68.5%	59.5%	59.5%	76.6%	67.5%
Taylor	78.3%	77.4%	74.0%	75.1%	74.7%	77.8%	63.5%	62.4%	49.5%	64.7%
Union	76.7%	81.7%	71.4%	80.7%	76.4%	93.2%	70.4%	79.0%	82.8%	77.7%
Region	70.8%	73.1%	73.9%	78.5%	78.0%	80.8%	68.1%	70.9%	71.5%	74.3%
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
<ww.fldoe.org/eias/eiaspubs/pubstudent.asp and https://edstats.fldoe.org>

Illustration A-2

High School Graduation Rates
North Central Florida Region and State
School Years 2005-06 to 2014-15



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 declined over the 2006 to 2015 time frame, and has been consistently below the state performance levels for the period. The decline has been most pronounced from 2010 to 2015. In 2015, five school districts, Columbia, Dixie, Gilchrist, Taylor and Union, 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

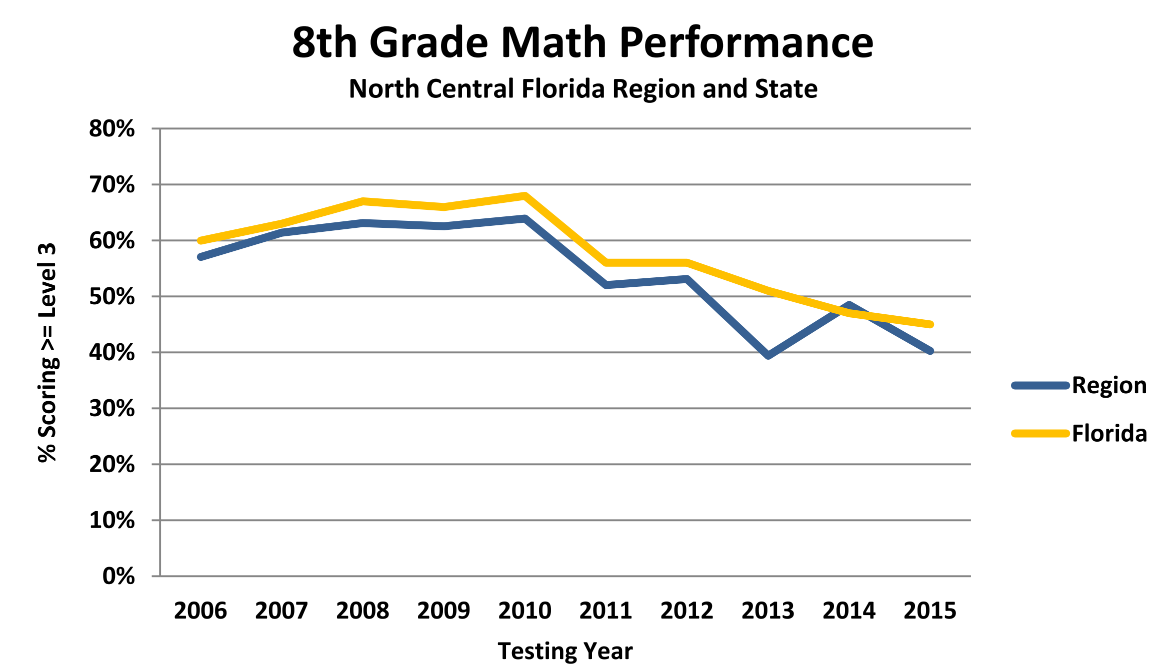
**Eighth Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5 on
Florida Comprehensive Assessment Test
North Central Florida Region and State
2006 to 2015**

	Year									
Area	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Alachua	57%	61%	67%	62%	65%	59%	56%	39%	56%	40%
Bradford	42%	55%	57%	50%	52%	40%	45%	11%	5%	10%
Columbia	53%	56%	55%	60%	57%	45%	48%	31%	43%	48%
Dixie	42%	53%	51%	63%	56%	50%	65%	45%	53%	50%
Gilchrist	28%	39%	40%	42%	49%	70%	68%	60%	55%	61%
Hamilton	63%	70%	63%	62%	67%	31%	21%	29%	23%	11%
Lafayette	37%	45%	30%	34%	41%	45%	55%	75%	34%	21%
Levy	68%	71%	71%	68%	71%	63%	58%	44%	38%	44%
Madison	55%	53%	62%	63%	79%	23%	38%	17%	16%	11%
Suwannee	56%	57%	58%	63%	61%	41%	45%	44%	49%	31%
Taylor	65%	69%	64%	72%	64%	50%	61%	54%	58%	50%
Union	59%	58%	62%	66%	66%	52%	60%	57%	49%	65%
Region	57%	61%	63%	63%	64%	52%	53%	39%	48%	40%
Florida	60%	63%	67%	66%	68%	56%	56%	51%	47%	45%

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
2006 to 2015**



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 but with sporadic advances and declines between 2008 and 2012. Seven of the 12 counties in the region experienced declines in Gross Domestic Product between 2006 and 2015. As demonstrated in Illustration A-4, the region experienced growth in its Gross Domestic Product between 2012 and 2015.

Table A-4

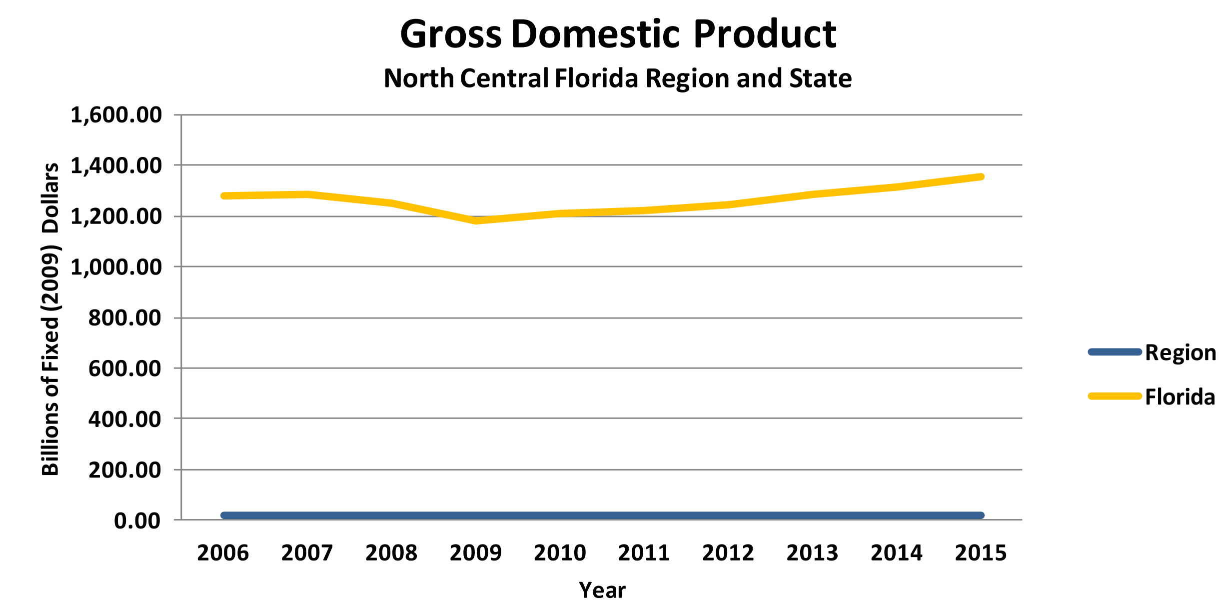
Gross Domestic Product
North Central Florida Region and State
Billions of Fixed 2009 Dollars
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	10.71	10.84	10.94	10.62	10.91	10.89	10.95	11.21	11.42	11.77
Bradford	0.60	0.59	0.59	0.58	0.53	0.51	0.49	0.49	0.50	0.52
Columbia	2.06	2.09	1.97	2.03	1.98	1.77	1.74	1.78	1.82	1.88
Dixie	0.25	0.23	0.22	0.21	0.20	0.21	0.20	0.21	0.21	0.22
Gilchrist	0.26	0.25	0.24	0.23	0.24	0.25	0.24	0.25	0.26	0.27
Hamilton	0.39	0.39	0.37	0.37	0.33	0.34	0.36	0.35	0.36	0.37
Lafayette	0.13	0.13	0.14	0.15	0.13	0.14	0.13	0.13	0.13	0.14
Levy	0.73	0.73	0.69	0.67	0.69	0.65	0.63	0.65	0.67	0.69
Madison	0.41	0.38	0.37	0.39	0.40	0.36	0.35	0.37	0.38	0.39
Suwannee	0.93	0.96	0.84	0.85	0.92	0.90	0.89	0.94	0.96	0.99
Taylor	0.57	0.59	0.55	0.55	0.60	0.62	0.61	0.66	0.68	0.70
Union	0.30	0.29	0.29	0.27	0.26	0.26	0.25	0.25	0.26	0.26
Region	17.34	17.46	17.21	16.90	17.20	16.89	16.83	17.29	17.63	18.18
Florida	1,277.05	1,283.05	1,250.59	1,183.07	1,207.53	1,223.15	1,246.73	1,284.89	1,316.56	1,358.27

Source: Regional Economic Modeling, Inc. PI+, Florida Counties v1.7

Illustration A-4

Gross Domestic Product
North Central Florida Region and State
Billions of Fixed 2009 Dollars
2006 to 2015



Source: Regional Economic Modeling, Inc. PI+, Florida Counties v1.7

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 2005-06 to Fiscal Year 2014-15 period, with slight declines in Fiscal Years 2008-09 and 2009-10, due primarily to the economic downturn. Two counties, Lafayette and Union, did not collect tourism development taxes for the period.

Table A-5

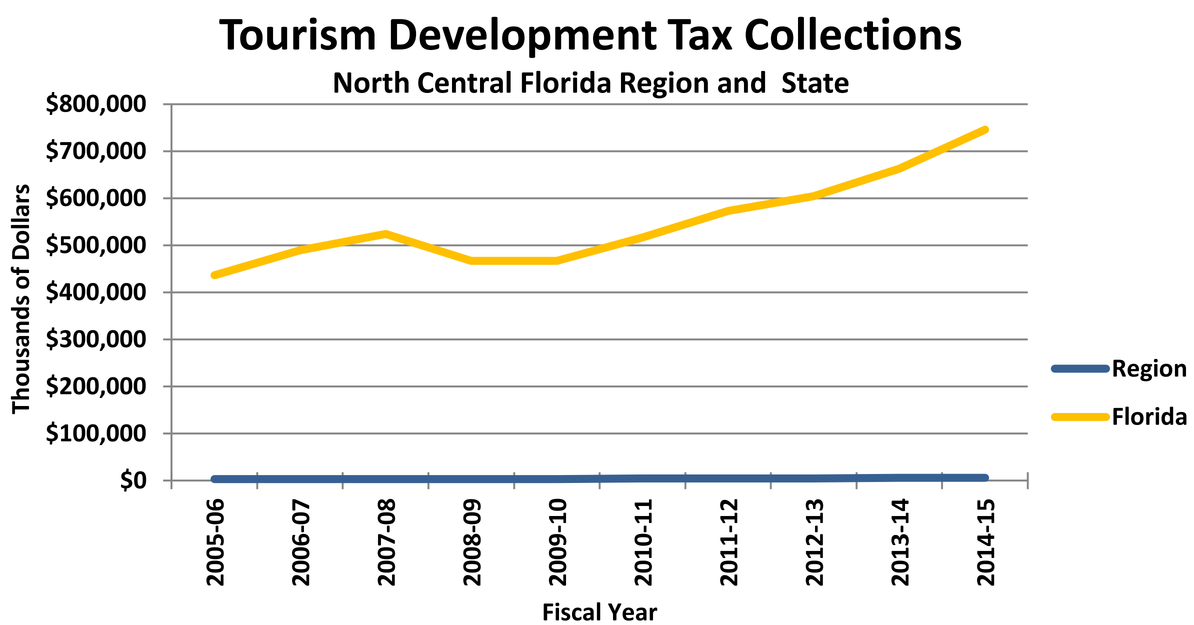
Tourism Development Tax Collections
North Central Florida Region and State
Thousands of Dollars
2005-06 to 2014-15

Area	Fiscal Year									
	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Alachua	$1,968	$2,238	$2,278	$1,980	$2,133	$3,338	$3,488	$3,542	$3,904	$4,226
Bradford	$53	$68	$108	$102	$90	$82	$85	$82	$89	$100
Columbia	$421	$401	$392	$383	$385	$586	$627	$668	$916	$987
Dixie	$0	$0	$0	$0	$0	$7	$26	$23	$24	$30
Gilchrist	$0	$8	$21	$21	$26	$30	$28	$24	$29	$40
Hamilton	$47	$52	$44	$33	$24	$31	$30	$28	$30	$30
Lafayette	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Levy	$162	$170	$168	$147	$155	$152	$157	$164	$169	$189
Madison	$87	$95	$86	$80	$70	$84	$85	$86	$102	$115
Suwannee	$103	$107	$117	$103	$101	$110	$167	$162	$193	$219
Taylor	$126	$153	$172	$173	$180	$220	$196	$205	$231	$229
Union	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Region	$2,968	$3,291	$3,387	$3,022	$3,163	$4,641	$4,887	$4,984	$5,690	$6,166
Florida	$436,165	$489,307	$524,341	$466,657	$466,707	$516,632	$572,967	$604,643	$662,750	$746,014

Source: Florida Department of Revenue website, Local Government Tax Receipts by County, <http://dor.myflorida.com/dor/taxes/colls_from_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
2005-06 to 2014-15**



Source: Florida Department of Revenue, Local Government Tax Receipts

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 2006, the region imported approximately 37.7 percent more goods and services than it exported, while in 2015, the ratio of exports to imports increased to approximately 45.3 percent, as opposed to the state ratios of approximately 3.8 percent in 2006 and approximately 2.7 percent in 2015. The increase in the export to import ratio demonstrates a significant leakage of capital from the region.

Table A-6a

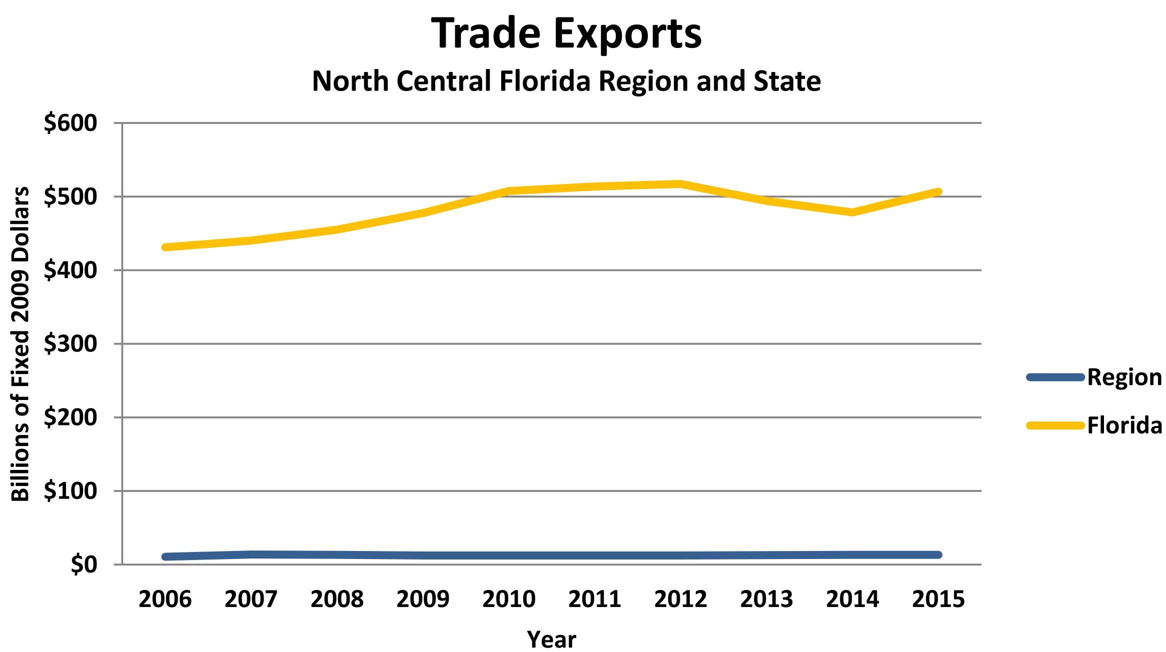
Trade Exports
North Central Florida Region and State
Billions of Fixed 2009 Dollars
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	3.19	6.29	6.41	5.97	6.15	6.17	6.22	6.39	6.60	6.78
Bradford	0.51	0.51	0.52	0.48	0.43	0.44	0.43	0.44	0.46	0.47
Columbia	2.39	2.39	2.14	2.22	2.10	1.72	1.67	1.74	1.80	1.86
Dixie	0.30	0.27	0.24	0.22	0.20	0.24	0.22	0.22	0.22	0.23
Gilchrist	0.20	0.19	0.17	0.15	0.15	0.16	0.16	0.16	0.16	0.17
Hamilton	0.71	0.71	0.66	0.60	0.53	0.57	0.59	0.61	0.63	0.64
Lafayette	0.09	0.10	0.10	0.11	0.09	0.10	0.10	0.10	0.10	0.11
Levy	0.70	0.72	0.66	0.58	0.58	0.55	0.55	0.56	0.58	0.59
Madison	0.51	0.42	0.42	0.41	0.44	0.37	0.38	0.40	0.41	0.42
Suwannee	1.12	1.14	0.91	0.86	0.92	0.89	0.89	0.92	0.96	0.98
Taylor	0.76	0.82	0.76	0.71	0.79	0.84	0.85	0.89	0.91	0.93
Union	0.21	0.19	0.19	0.16	0.16	0.17	0.17	0.17	0.18	0.18
Region	$10.68	$13.74	$13.16	$12.47	$12.52	$12.22	$12.22	$12.59	$13.02	$13.37
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. PI+, Florida Counties v1.7

Illustration A-6a

Trade Exports
North Central Florida Region and State
Billions of Fixed 2009 Dollars
2005 to 2015



Source: Regional Economic Modeling, Inc. PI+, Florida Counties v1.7

As shown in Table A-6b and Illustration A-6b, from 2006 to 2015 the value of Trade Imports in the region increased by $4.72 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

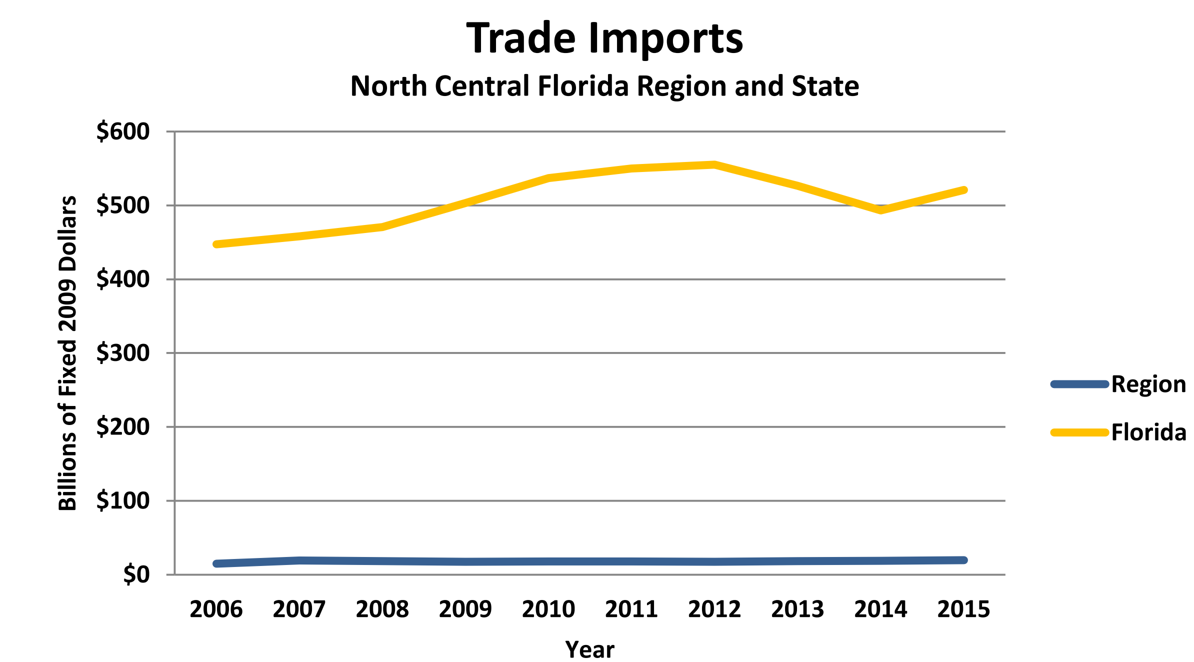
Trade Imports
North Central Florida Region and State
Billions of Fixed 2009 Dollars
2006 to 2015

	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	$4.48	$8.75	$8.53	$8.03	$8.19	$8.35	$8.33	$8.53	$8.83	$9.12
Bradford	$0.93	$0.94	$0.93	$0.89	$0.88	$0.87	$0.84	$0.85	$0.89	$0.92
Columbia	$2.64	$2.67	$2.50	$2.43	$2.49	$2.33	$2.20	$2.27	$2.36	$2.43
Dixie	$0.46	$0.44	$0.42	$0.39	$0.39	$0.42	$0.40	$0.42	$0.43	$0.45
Gilchrist	$0.54	$0.53	$0.51	$0.49	$0.52	$0.54	$0.52	$0.54	$0.56	$0.57
Hamilton	$0.69	$0.69	$0.66	$0.58	$0.57	$0.61	$0.61	$0.62	$0.64	$0.65
Lafayette	$0.20	$0.21	$0.22	$0.21	$0.21	$0.22	$0.21	$0.22	$0.23	$0.24
Levy	$1.27	$1.28	$1.22	$1.13	$1.19	$1.14	$1.12	$1.25	$1.29	$1.32
Madison	$0.70	$0.65	$0.65	$0.61	$0.64	$0.59	$0.59	$0.62	$0.65	$0.67
Suwannee	$1.49	$1.55	$1.40	$1.32	$1.43	$1.43	$1.40	$1.45	$1.51	$1.56
Taylor	$0.88	$0.93	$0.88	$0.79	$0.89	$0.92	$0.91	$1.02	$1.07	$1.09
Union	$0.44	$0.43	$0.41	$0.40	$0.41	$0.40	$0.39	$0.39	$0.41	$0.42
Region	$14.71	$19.07	$18.32	$17.25	$17.79	$17.81	$17.51	$18.17	$18.85	$19.43
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. PI+, Florida Counties v1.7

Illustration A-6b

Trade Imports
North Central Florida Region and State
Billions of Fixed 2009 Dollars
2006 to 2015



Source: Regional Economic Modeling, Inc. PI+, Florida Counties v1.7

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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 1.8 percent between the 2010 and 2015, compared with an increase of 7.2 percent for the state. The population of the region is expected to increase by 16.3 percent between 2015 and 2045, while the population of the state is projected to increase by 35.9 percent over the same period. Stagnation in the national economy could alter these projections significantly as a prolonged sluggish housing market could prevent people from selling their homes and relocating to Florida.

Table A-7

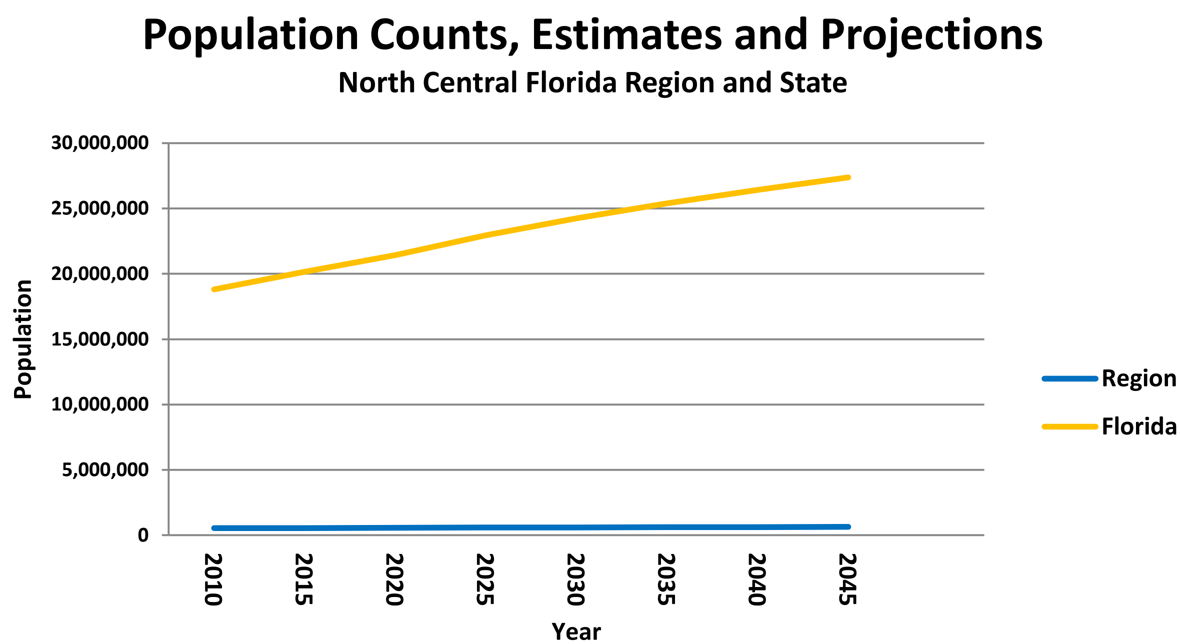
Population Counts, Estimates and Projections
North Central Florida Region and State
2010 to 2045

	Census	Estimate	Projections					
	2010	2015	2020	2025	2030	2035	2040	2045
Alachua	247,336	254,893	265,500	275,200	283,100	290,300	296,700	302,700
Bradford	28,520	27,310	28,800	29,300	29,500	29,700	29,900	30,100
Columbia	67,531	68,163	71,100	73,700	75,800	77,600	79,100	80,300
Dixie	16,422	16,468	17,200	17,700	18,100	18,400	18,700	18,900
Gilchrist	16,939	16,839	17,500	18,400	19,000	19,600	20,100	20,500
Hamilton	14,799	14,630	15,300	15,600	15,900	16,200	16,400	16,600
Lafayette	8,870	8,664	8,900	9,200	9,500	9,800	10,000	10,200
Levy	40,801	40,448	41,700	43,000	44,100	44,900	45,600	46,200
Madison	19,224	19,200	19,400	19,500	19,600	19,700	19,800	19,900
Suwannee	41,551	44,452	46,000	47,800	49,300	50,600	51,800	52,700
Taylor	22,570	22,824	22,400	22,700	23,000	23,200	23,300	23,500
Union	15,535	15,918	16,300	16,800	17,100	17,500	17,700	18,000
Region	540,098	549,809	570,100	588,900	604,000	617,500	629,100	639,600
Florida	18,801,310	20,148,654	21,438,700	22,943,900	24,244,300	25,397,400	26,426,400	27,378,400

Source: Florida Estimates of Population, Table 5, and Projections of Florida Population by County, 2020 - 2045, with Estimates for 2016, Bureau of Economic and Business Research, 4/12/2017.

Illustration A-7

**Population Counts, Estimates and Projections
North Central Florida Region and State
2010 to 2045**



Source: Bureau of Economic and Business Research, University of Florida

b. Annual Building Permits

As shown in Table A-8 and Illustration A-8, the region, similar to the state, has experienced significant declines in new residential construction since the collapse of the housing market in 2006. The region has also tracked the state in recovery. As with the state, the region began to experience an increase in construction activity in 2012. However, the number of annual building permits issued in the region remains less than half the number issued in 2006.

Table A-8

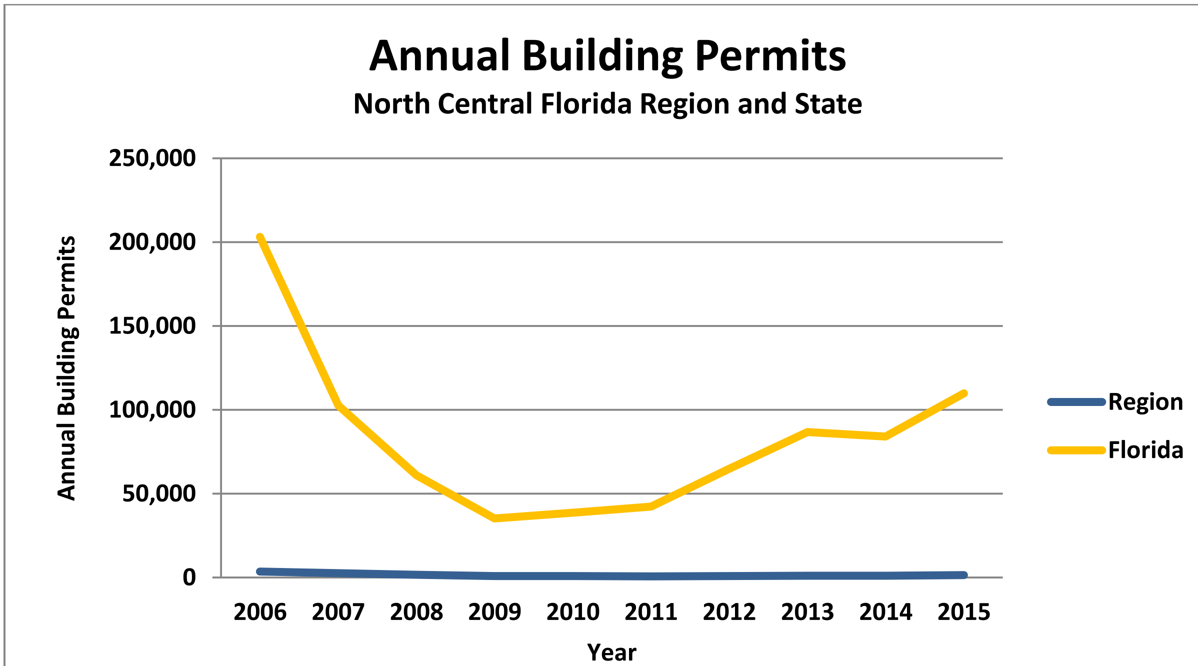
Annual Building Permits
North Central Florida Region and State
Residential Units
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	1949	1388	1006	519	454	444	589	770	762	1171
Bradford	124	126	44	24	31	18	23	27	0	0
Columbia	473	326	227	99	84	52	47	65	80	80
Dixie	83	86	53	19	18	17	20	24	24	26
Gilchrist	92	87	48	10	36	20	35	30	37	43
Hamilton	40	46	26	13	22	15	12	9	9	22
Lafayette	26	18	14	10	19	4	14	4	11	10
Levy	278	213	101	83	56	54	50	57	49	49
Madison	89	54	48	32	27	27	28	34	33	35
Suwannee	274	123	52	53	50	28	25	28	41	40
Taylor	75	52	32	17	33	21	21	18	24	41
Union	71	52	22	17	13	9	13	15	22	23
Region	3,574	2,571	1,673	896	843	709	877	1,081	1,092	1,540
Florida	203,238	102,551	61,042	35,329	38,679	42,360	64,810	86,752	84,073	109,923

Source: <https://socds.huduser.gov/permits/index.html>

Illustration A-8

Annual Building Permits
North Central Florida Region and State
Residential Units
2006 to 2015



Source: https://socds.huduser.gov/permits/index.html

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. Daily Vehicle Miles Traveled in the region has been flat since 2006. Statewide, Daily Vehicle Miles Traveled peaked in 2012 and gradually declined through 2015.

Table A-9

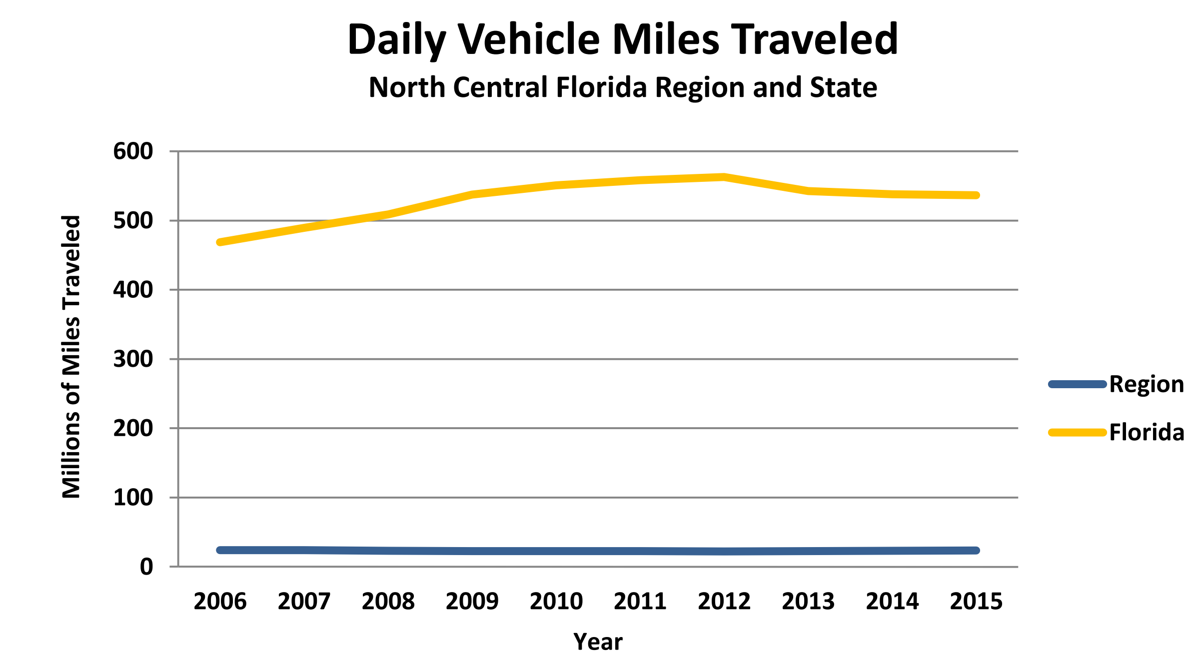
Daily Vehicle Miles Traveled
North Central Florida Region and State
Millions of Miles
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	8.10	8.46	8.00	7.83	7.83	7.76	7.61	7.80	8.09	8.25
Bradford	1.09	1.07	1.04	1.03	1.00	0.99	0.99	1.02	1.03	1.05
Columbia	3.70	3.72	3.52	3.57	3.54	3.58	3.52	3.57	3.82	3.74
Dixie	0.83	0.81	0.78	0.78	0.77	0.76	0.66	0.64	0.64	0.67
Gilchrist	0.70	0.67	0.67	0.65	0.66	0.69	0.69	0.69	0.70	0.69
Hamilton	1.59	1.68	1.66	1.54	1.49	1.39	1.38	1.35	1.50	1.50
Lafayette	0.46	0.45	0.45	0.44	0.44	0.43	0.43	0.42	0.43	0.42
Levy	1.66	1.65	1.64	1.60	1.62	1.65	1.69	1.67	1.70	1.75
Madison	1.57	1.55	1.47	1.48	1.52	1.52	1.50	1.52	1.47	1.61
Suwannee	2.51	2.50	2.39	2.38	2.39	2.33	2.32	2.30	2.34	2.43
Taylor	1.22	1.17	1.11	1.10	1.11	1.04	1.06	1.02	1.05	1.06
Union	0.45	0.43	0.42	0.41	0.41	0.40	0.40	0.40	0.40	0.42
Region	23.88	24.16	23.15	22.80	22.77	22.54	22.25	22.41	23.16	23.58
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
2006 to 2015



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

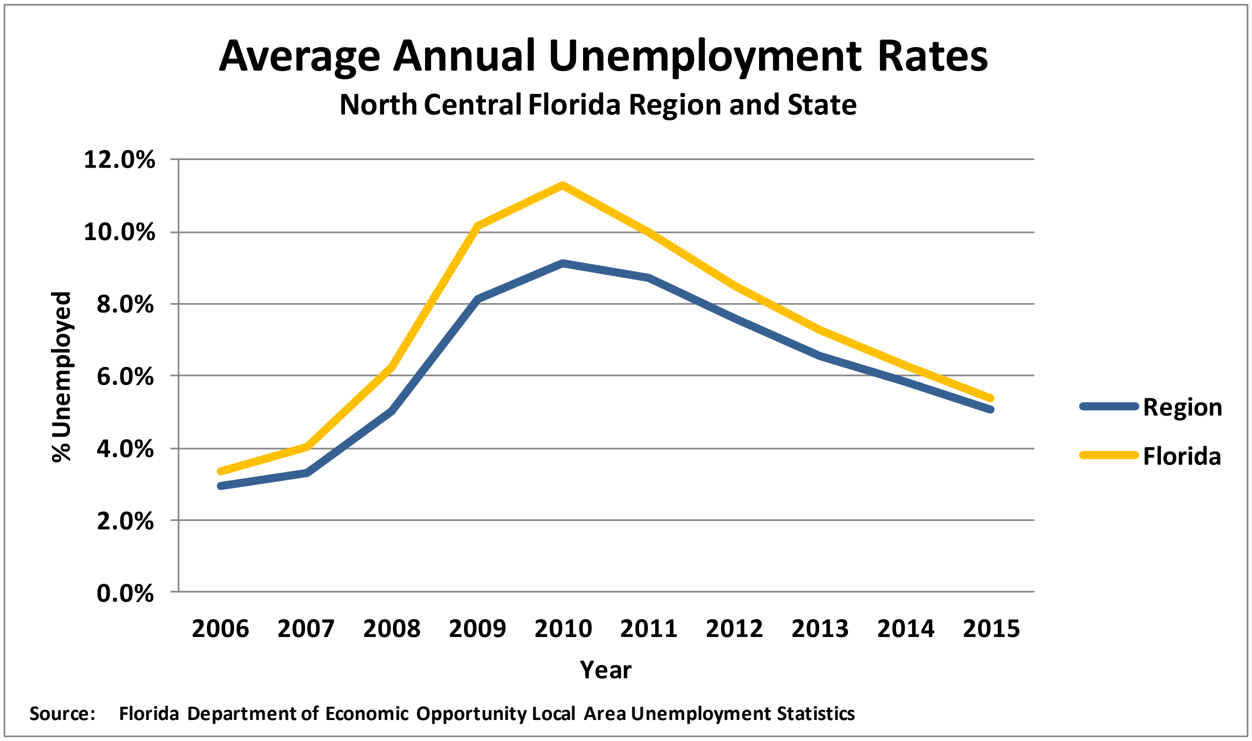
Average Annual Unemployment Rates
North Central Florida Region and State
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	2.6%	2.9%	4.2%	6.9%	7.9%	7.6%	6.7%	5.7%	5.2%	4.6%
Bradford	2.8%	3.3%	4.7%	7.8%	9.2%	9.1%	7.6%	6.3%	5.6%	4.8%
Columbia	3.2%	3.5%	5.4%	9.0%	10.1%	10.3%	8.9%	7.6%	6.6%	5.4%
Dixie	3.4%	4.2%	7.2%	11.1%	13.0%	12.3%	10.3%	8.5%	7.4%	6.2%
Gilchrist	2.8%	3.7%	5.5%	9.1%	9.9%	10.3%	9.1%	7.9%	6.7%	5.6%
Hamilton	3.7%	4.5%	7.0%	10.8%	11.8%	10.4%	8.9%	8.6%	7.6%	6.4%
Lafayette	2.7%	2.9%	4.4%	7.3%	8.6%	6.2%	5.7%	5.2%	5.1%	4.5%
Levy	3.5%	4.1%	6.9%	11.1%	12.0%	10.9%	9.3%	8.2%	6.8%	5.7%
Madison	5.0%	5.9%	6.8%	10.4%	11.4%	9.6%	8.6%	7.8%	7.1%	6.1%
Suwannee	3.2%	3.5%	5.8%	9.4%	10.0%	9.2%	8.0%	6.9%	6.3%	5.4%
Taylor	3.9%	4.1%	6.4%	10.4%	11.2%	10.1%	9.0%	7.8%	6.9%	6.6%
Union	2.6%	3.0%	4.7%	7.3%	8.7%	8.2%	7.2%	6.3%	6.0%	4.8%
Region	3.0%	3.3%	5.0%	8.1%	9.1%	8.7%	7.6%	6.6%	5.8%	5.0%
Florida	3.3%	4.0%	6.2%	10.2%	11.3%	10.0%	8.5%	7.3%	6.3%	5.4%

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
2006 to 2015



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 2006 to 2015 in the region. While still the largest single employer in the region in 2015, employment in State Government did decline by 9.0 percent over the period. Private sector industries that posted significant employment gains over the period include Health Care, Accommodation and Food Services, Finance and Insurance, Transportation and Warehousing, Farming, Management of Companies and Mining.

Table A-11a

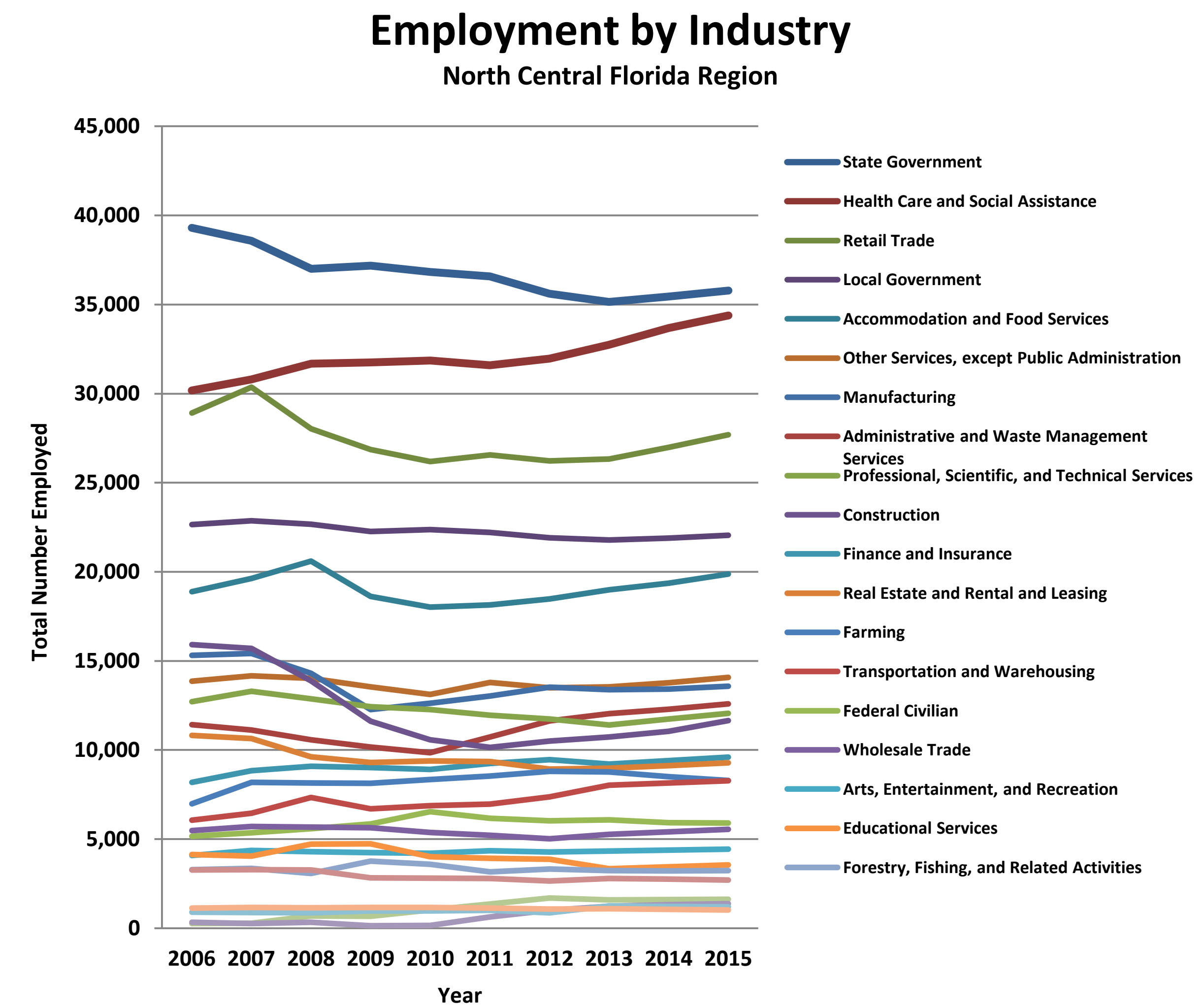
Employment by Industry
North Central Florida Region
2006 to 2015

Industry	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
State Government	39,312	38,573	36,999	37,181	36,834	36,577	35,608	35,155	35,442	35,784
Health Care and Social Assistance	30,187	30,801	31,674	31,744	31,855	31,590	31,960	32,742	33,681	34,396
Retail Trade	28,919	30,373	28,033	26,854	26,189	26,568	26,228	26,339	26,989	27,687
Local Government	22,652	22,865	22,677	22,256	22,370	22,217	21,905	21,789	21,895	22,055
Accommodation and Food Services	18,888	19,621	20,603	18,629	18,016	18,148	18,479	19,001	19,370	19,875
Other Services, except Public Administr	13,869	14,171	14,027	13,554	13,118	13,802	13,497	13,551	13,780	14,075
Manufacturing	15,311	15,417	14,312	12,275	12,627	13,041	13,533	13,390	13,425	13,578
Administrative and Waste Management	11,424	11,124	10,580	10,169	9,851	10,740	11,643	12,035	12,290	12,599
Professional, Scientific, and Technical S	12,714	13,296	12,867	12,428	12,272	11,957	11,740	11,401	11,745	12,056
Construction	15,920	15,698	13,878	11,614	10,582	10,155	10,503	10,727	11,051	11,661
Finance and Insurance	8,193	8,837	9,085	9,013	8,914	9,243	9,466	9,217	9,406	9,597
Real Estate and Rental and Leasing	10,822	10,644	9,611	9,307	9,385	9,346	8,929	8,991	9,117	9,278
Farming	6,984	8,180	8,150	8,142	8,342	8,546	8,814	8,763	8,509	8,290
Transportation and Warehousing	6,065	6,450	7,330	6,709	6,886	6,959	7,378	8,021	8,146	8,269
Federal Civilian	5,160	5,349	5,586	5,845	6,541	6,164	6,036	6,077	5,926	5,898
Wholesale Trade	5,476	5,716	5,669	5,645	5,370	5,220	5,016	5,270	5,413	5,555
Arts, Entertainment, and Recreation	4,081	4,359	4,288	4,239	4,206	4,357	4,282	4,335	4,379	4,436
Educational Services	4,139	4,052	4,714	4,742	4,015	3,920	3,864	3,348	3,446	3,548
Forestry, Fishing, and Related Activities	3,285	3,363	3,081	3,761	3,597	3,170	3,324	3,232	3,216	3,242
Information	3,278	3,286	3,276	2,836	2,815	2,786	2,657	2,797	2,759	2,712
Management of Companies and Enterp	262	275	690	663	1,033	1,369	1,694	1,596	1,609	1,625
Mining	343	258	331	148	164	629	1,006	1,245	1,332	1,378
Utilities	895	877	861	968	968	1,012	861	1,256	1,228	1,210
Federal Military	1,132	1,160	1,150	1,170	1,169	1,128	1,085	1,089	1,056	1,032

Source: Regional Economic Modeling, Inc., PI+, Florida Counties v1.7

Illustration A-11a

**Employment by Industry
North Central Florida Region
2006 to 2015**



Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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 2006 to 2015, as a percentage of total employment. This trend is likely to continue as the private sector experiences job growth and 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
2006 to 2015

Sector	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Employment-Region	269	275	269	260	257	259	260	261	265	270
Total Employment-State	15,854	16,149	15,842	15,222	15,113	15,469	15,739	16,060	16,370	16,672
Private Sector Employment-Region	201	207	203	193	190	193	195	197	201	205
Private Sector Employment-State	13,887	14,146	13,813	13,216	13,114	13,504	13,796	14,131	14,441	14,734
Public Sector Employment-Region	68	68	66	66	67	66	65	64	64	65
Public Sector Employment-State	1,967	2,003	2,029	2,006	2,000	1,964	1,943	1,929	1,929	1,938

Source: Regional Economic Modeling, Inc., PI+, Florida Counties v1.7

Table A-11c

Percent Employment by Sector
North Central Florida Region
2006 to 2015

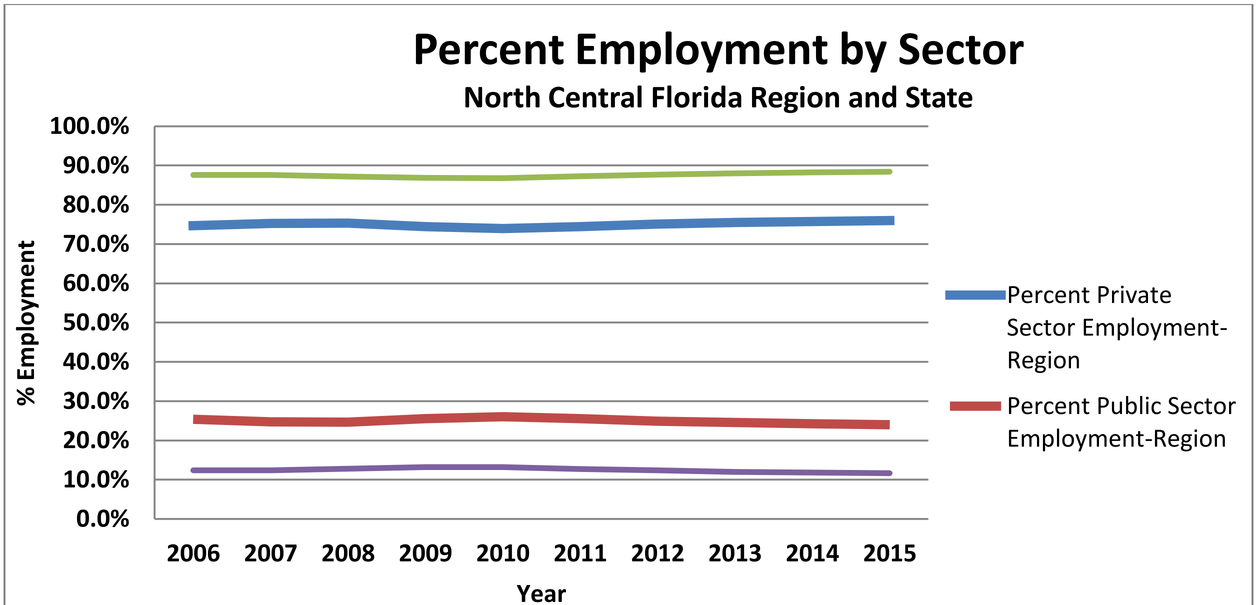
Sector	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Percent Private Sector Employment-Region	74.7%	75.3%	75.4%	74.4%	74.0%	74.4%	75.1%	75.5%	75.7%	76.0%
Percent Public Sector Employment-Region	25.3%	24.7%	24.6%	25.6%	26.0%	25.6%	24.9%	24.5%	24.3%	24.0%
Percent Private Sector Employment-State	87.6%	87.6%	87.2%	86.8%	86.8%	87.3%	87.7%	88.0%	88.2%	88.4%
Percent Public Sector Employment-State	12.4%	12.4%	12.8%	13.2%	13.2%	12.7%	12.3%	12.0%	11.8%	11.6%

Source: Regional Economic Modeling, Inc., PI+, Florida Counties v1.7

Illustration A-11b demonstrates that over the 2006 to 2015 period, public sector employment as a percent of total employment in the region gradually rose from 25.3 percent in 2006 to a high of 26.0 percent in 2010. Public sector employment as a percentage of total employment gradually declined from 2010 to 24.0 percent in 2015. 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 state economy.

Illustration A-11b

Percent Employment by Sector
North Central Florida Region and State
2006 to 2015



Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

c. Wages by Industry

As shown in Table A-12a and Illustration A-12a, the majority of industries experienced stable wage growth from 2006 to 2015. Four of the 23 industries measured had overall wage growth that met or exceeded an annual average rate of 3.0 percent. Industries that had the highest overall growth in average annual wages include Farm, Educational Services, Forestry, Fishing, and Related Activities and Wholesale Trade. Only three industries, Management, Federal Military and Mining had overall declining average annual wages for the period.

Table A-12a

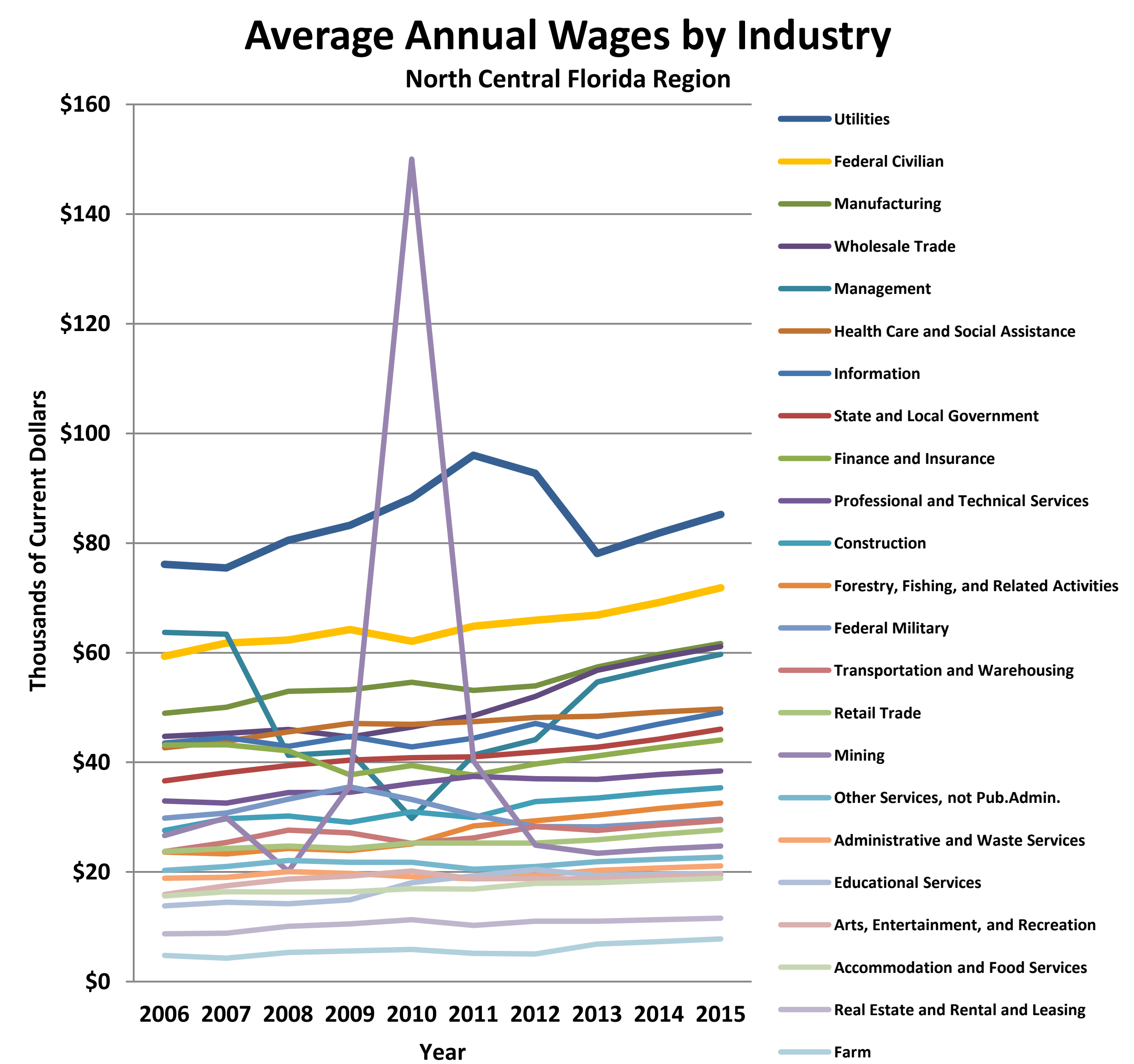
Average Annual Wages by Industry
North Central Florida Region
Thousands of Current Dollars
2006 to 2015

Industry	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Utilities	$76.1	$75.5	$80.5	$83.2	$88.2	$96.0	$92.7	$78.1	$81.8	$85.2
Federal Civilian	$59.3	$61.8	$62.3	$64.2	$62.1	$64.8	$65.9	$66.9	$69.1	$71.9
Manufacturing	$49.0	$50.0	$52.9	$53.2	$54.6	$53.1	$53.9	$57.4	$59.7	$61.7
Wholesale Trade	$44.7	$45.3	$46.0	$44.7	$46.4	$48.5	$52.0	$56.8	$59.1	$61.1
Management	$63.7	$63.4	$41.3	$42.0	$29.8	$41.3	$44.1	$54.6	$57.3	$59.7
Health Care and Social Assistance	$42.6	$43.8	$45.6	$47.1	$46.9	$47.4	$48.2	$48.4	$49.2	$49.7
Information	$43.5	$44.5	$42.9	$44.7	$42.8	$44.4	$47.1	$44.7	$47.0	$49.1
State and Local Government	$36.6	$38.1	$39.4	$40.4	$40.8	$41.0	$41.9	$42.8	$44.3	$46.0
Finance and Insurance	$43.2	$43.2	$42.1	$37.7	$39.4	$37.7	$39.7	$41.2	$42.7	$44.1
Professional and Technical Services	$32.9	$32.6	$34.5	$34.5	$36.1	$37.4	$37.0	$36.9	$37.8	$38.5
Construction	$27.6	$29.7	$30.2	$29.1	$31.0	$29.9	$32.8	$33.5	$34.5	$35.3
Forestry, Fishing, and Related Activities	$23.7	$23.3	$24.3	$23.9	$25.1	$28.4	$29.3	$30.4	$31.6	$32.6
Federal Military	$29.9	$30.7	$33.3	$35.5	$33.3	$30.4	$28.3	$28.2	$28.9	$29.6
Transportation and Warehousing	$23.7	$25.4	$27.6	$27.2	$25.2	$26.2	$28.3	$27.6	$28.6	$29.4
Retail Trade	$23.8	$24.3	$24.7	$24.3	$25.3	$25.3	$25.3	$25.9	$26.9	$27.7
Mining	$26.7	$29.9	$20.1	$35.7	$150.0	$40.3	$24.9	$23.4	$24.2	$24.7
Other Services, not Pub.Admin.	$20.3	$21.0	$22.1	$21.8	$21.8	$20.5	$21.0	$21.9	$22.3	$22.7
Administrative and Waste Services	$18.9	$19.1	$20.1	$19.8	$19.2	$18.7	$19.4	$20.3	$20.8	$21.1
Educational Services	$13.8	$14.5	$14.2	$15.0	$18.0	$19.3	$20.5	$19.4	$19.6	$19.8
Arts, Entertainment, and Recreation	$15.9	$17.5	$18.7	$19.3	$20.2	$18.8	$18.8	$18.7	$19.1	$19.5
Accommodation and Food Services	$15.7	$16.4	$16.3	$16.4	$17.0	$16.9	$17.9	$18.1	$18.5	$18.9
Real Estate and Rental and Leasing	$8.7	$8.9	$10.1	$10.6	$11.3	$10.2	$11.0	$11.0	$11.3	$11.6
Farm	$4.8	$4.3	$5.3	$5.6	$5.9	$5.2	$5.1	$6.9	$7.3	$7.8

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

Illustration A-12a

Average Annual Wages by Industry
North Central Florida Region
Thousands of Current Dollars
2006 to 2015



Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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 narrowed between 2006 to 2015 in both public and private sector employment.

Table A-12b

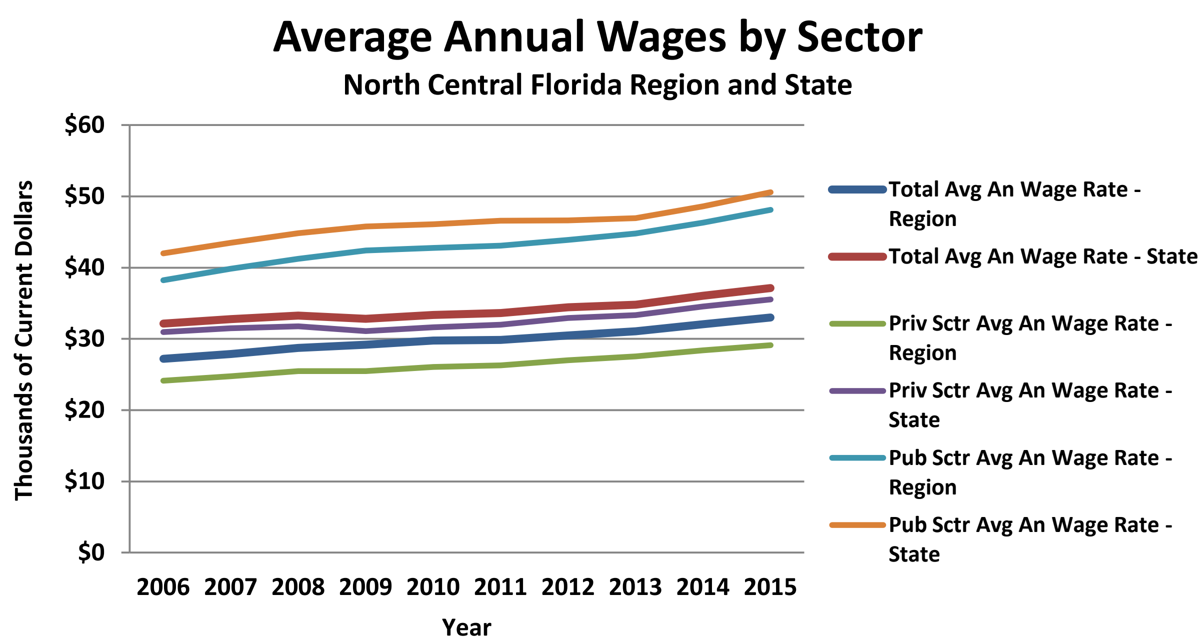
**Average Annual Wages by Sector
North Central Florida Region and State
Thousands of Current Dollars
2006 to 2015**

Sector	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Avg An Wage Rate - Region	$27.2	$27.9	$28.7	$29.2	$29.8	$29.9	$30.5	$31.1	$32.1	$33.0
Total Avg An Wage Rate - State	$32.1	$32.8	$33.3	$32.8	$33.4	$33.6	$34.4	$34.8	$36.0	$37.1
Priv Sctr Avg An Wage Rate - Region	$24.1	$24.8	$25.5	$25.5	$26.1	$26.3	$27.0	$27.6	$28.4	$29.1
Priv Sctr Avg An Wage Rate - State	$31.0	$31.5	$31.8	$31.1	$31.6	$32.0	$32.9	$33.4	$34.6	$35.6
Pub Sctr Avg An Wage Rate - Region	$38.2	$39.9	$41.3	$42.4	$42.8	$43.1	$43.9	$44.8	$46.3	$48.1
Pub Sctr Avg An Wage Rate - State	$42.0	$43.5	$44.8	$45.8	$46.1	$46.6	$46.6	$46.9	$48.6	$50.6

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

Illustration A-12b

Average Annual Wages by Sector
North Central Florida Region and State
Thousands of Current Dollars
2006 to 2015



Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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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 downward trend from 2006 to 2015, 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 in 2009 as local governments adjusted millage rates to meet budgetary requirements. However, millage rates resumed their decline in 2010 and continued to decline through 2015.

Table A-13

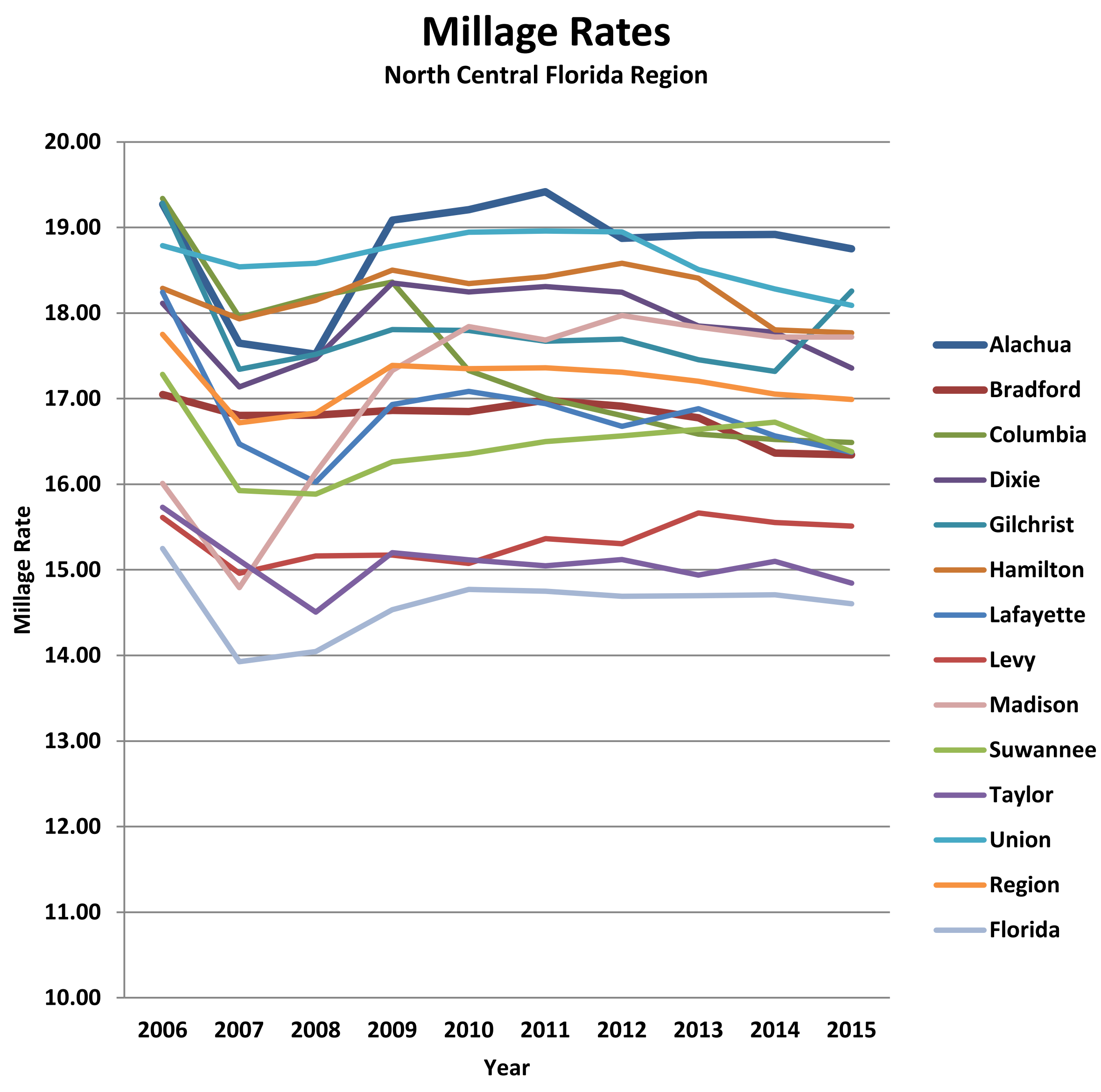
Millage Rates
North Central Florida Region and State
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	19.27	17.65	17.52	19.08	19.21	19.42	18.87	18.91	18.92	18.75
Bradford	17.05	16.80	16.81	16.86	16.85	16.98	16.91	16.78	16.37	16.34
Columbia	19.34	17.95	18.19	18.36	17.33	17.01	16.80	16.59	16.52	16.49
Dixie	18.11	17.14	17.47	18.35	18.25	18.31	18.24	17.85	17.78	17.36
Gilchrist	19.28	17.34	17.52	17.81	17.80	17.67	17.70	17.45	17.32	18.26
Hamilton	18.29	17.93	18.15	18.50	18.35	18.43	18.58	18.41	17.80	17.77
Lafayette	18.24	16.47	16.02	16.93	17.08	16.94	16.68	16.88	16.57	16.37
Levy	15.61	14.96	15.16	15.17	15.07	15.37	15.31	15.66	15.55	15.51
Madison	16.01	14.79	16.13	17.33	17.84	17.69	17.97	17.83	17.72	17.72
Suwannee	17.29	15.93	15.88	16.26	16.36	16.50	16.57	16.64	16.72	16.38
Taylor	15.73	15.11	14.51	15.20	15.12	15.05	15.12	14.94	15.10	14.84
Union	18.79	18.54	18.58	18.78	18.94	18.96	18.95	18.51	18.28	18.09
Region	17.75	16.72	16.83	17.39	17.35	17.36	17.31	17.20	17.05	16.99
Florida	15.25	13.93	14.05	14.53	14.77	14.75	14.69	14.70	14.71	14.60

Source: Florida Department of Revenue, Property Tax Analysis, Millage, Levies and Collections; Florida Ad Valorem Valuation and Tax Data 2006 to 2015; Millage and Taxes Levied Report <http://floridarevenue.com/dor/property/resources/data.html>

Illustration A-13

Millage Rates
North Central Florida Region and State
2006 to 2015



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 2006 to 2015 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 82.6 percent compared to 46.2 percent for the state.

Table A-14

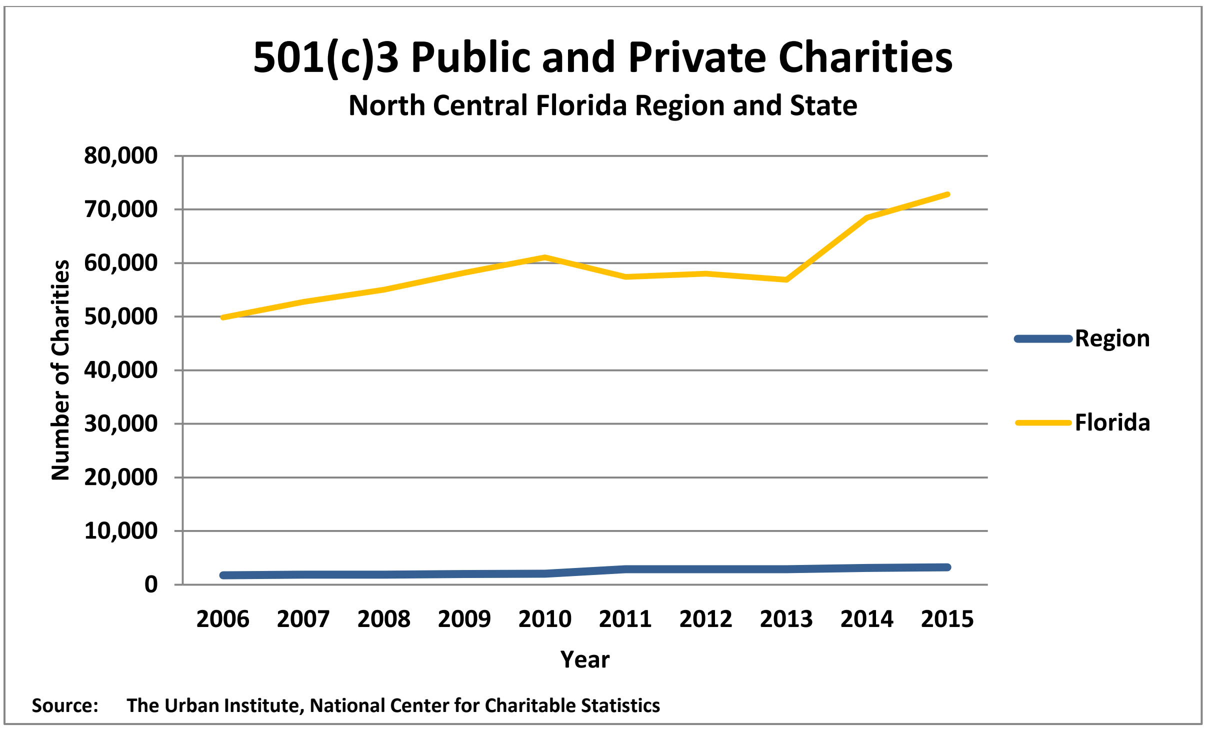
Registered 501(c)3 Organizations
Public and Private Foundation Charities
North Central Florida Region and State
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	1,091	1,137	1,135	1,219	1,266	1,189	1,197	1,196	1,265	1,326
Bradford	59	60	63	67	65	140	137	129	132	144
Columbia	170	172	182	192	200	183	188	194	194	204
Dixie	32	31	30	34	35	691	695	688	702	719
Gilchrist	38	39	40	43	48	49	49	48	54	49
Hamilton	34	33	36	36	38	51	50	44	50	54
Lafayette	20	22	25	26	29	28	23	24	57	61
Levy	91	103	111	115	123	215	219	211	253	262
Madison	57	61	66	67	74	117	113	113	175	176
Suwannee	109	110	110	109	115	121	127	133	141	135
Taylor	48	51	48	49	53	51	48	51	52	80
Union	29	30	26	31	32	31	31	33	35	37
Region	1,778	1,849	1,872	1,988	2,078	2,866	2,877	2,864	3,110	3,247
Florida	49,817	52,756	55,048	58,209	61,047	57,406	58,009	56,904	68,456	72,843

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
2006 to 2015



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 2006 to 2016, with slightly greater regional participation than the state in most election years. Voter participation was significantly greater during the presidential election cycle, and dropped off from 21.3 percent to 26.4 percent during non-presidential election years.

Table A-15

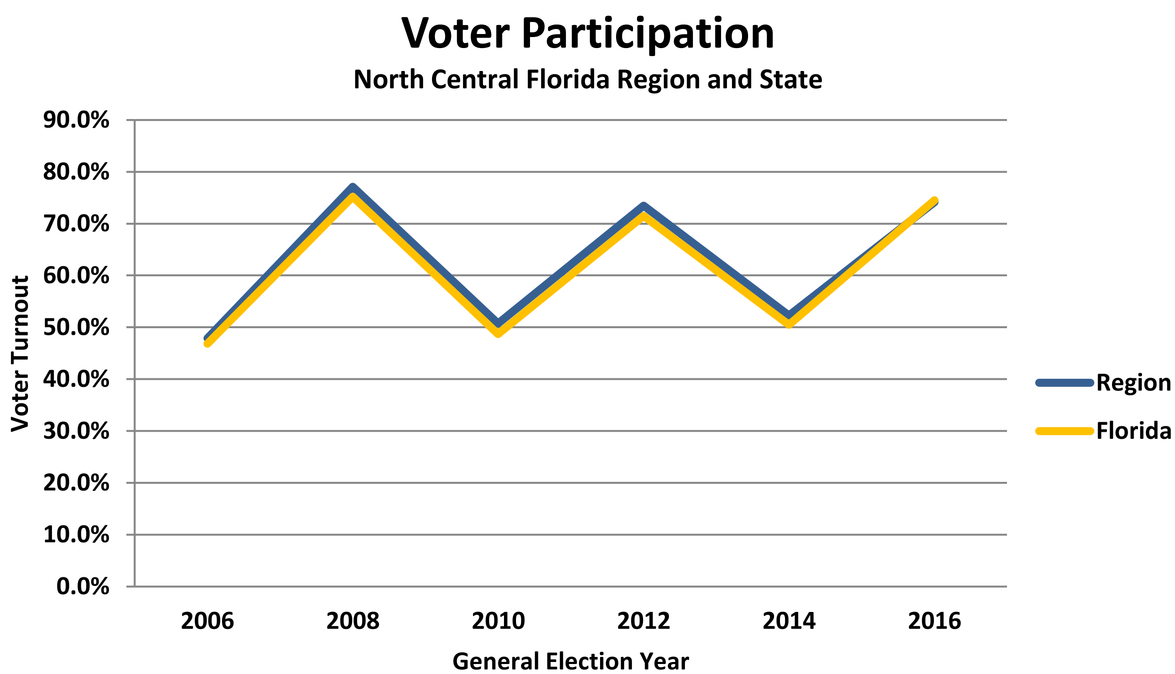
Voter Participation
North Central Florida Region and State
Biennial General Elections
2006 to 2016

Area	General Election Year					
	2006	2008	2010	2012	2014	2016
Alachua	48.3%	81.7%	49.4%	73.5%	50.2%	73.6%
Bradford	50.7%	74.9%	51.8%	75.7%	55.4%	76.2%
Columbia	43.5%	74.1%	48.1%	76.9%	52.4%	77.6%
Dixie	48.9%	68.5%	53.5%	68.5%	55.3%	73.4%
Gilchrist	56.4%	73.4%	50.5%	72.0%	54.6%	74.6%
Hamilton	45.6%	73.5%	51.6%	68.6%	48.6%	68.4%
Lafayette	51.0%	76.4%	58.1%	75.4%	59.9%	77.0%
Levy	47.4%	72.8%	51.9%	74.0%	52.2%	73.1%
Madison	52.3%	73.0%	55.5%	72.7%	55.6%	74.4%
Suwannee	47.0%	71.8%	54.7%	71.1%	51.5%	71.5%
Taylor	45.2%	72.2%	52.4%	73.3%	55.9%	76.5%
Union	45.4%	73.7%	52.3%	74.6%	72.1%	79.3%
Region	47.9%	77.1%	50.7%	73.5%	52.2%	74.1%
Florida	46.8%	75.2%	48.7%	71.5%	50.5%	74.5%

Source: Florida Department of State, Division of Elections
<https://doe.dos.state.fl.us/elections/resultsarchive/Index.asp?ElectionDate=11/8/2016&DATAMODE=>

Illustration A-15

Voter Participation
North Central Florida Region and State
Biennial General Elections
2006 to 2016



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 2006 to 2015. Eight of the 12 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 declined 15.5 percent from 2006 to 2015.

Table A-16

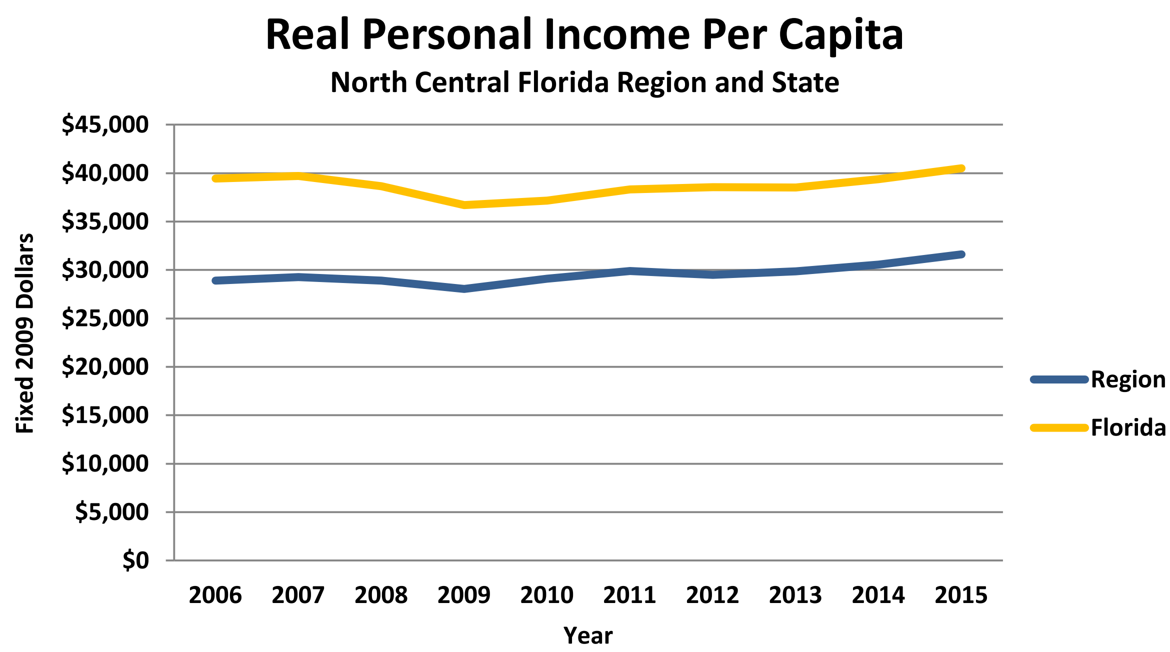
Real Personal Per Capita Income
North Central Florida Region and State
Fixed 2009 Dollars
2006 to 2015

	Year									
Area	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Alachua	$34,739	$34,975	$34,792	$33,303	$34,200	$35,224	$34,738	$35,025	$35,540	$36,648
Bradford	$26,495	$27,010	$27,046	$27,395	$28,220	$29,019	$29,811	$29,781	$30,526	$31,346
Columbia	$24,418	$25,450	$25,197	$24,515	$26,100	$27,185	$26,030	$26,319	$27,171	$28,221
Dixie	$20,406	$20,312	$19,689	$19,424	$19,877	$20,276	$20,719	$21,327	$22,099	$22,994
Gilchrist	$29,037	$29,138	$28,466	$28,063	$29,508	$29,899	$30,700	$30,718	$31,699	$32,890
Hamilton	$17,346	$17,706	$17,734	$17,321	$18,282	$19,111	$18,163	$18,517	$19,214	$19,911
Lafayette	$16,356	$18,358	$18,886	$17,721	$18,193	$18,231	$18,333	$18,377	$18,813	$19,418
Levy	$25,483	$25,281	$24,589	$24,319	$25,721	$26,319	$25,999	$26,676	$27,600	$28,688
Madison	$22,225	$22,361	$22,114	$22,012	$22,843	$23,351	$23,365	$23,841	$24,718	$25,777
Suwannee	$26,237	$27,354	$26,314	$25,339	$26,172	$25,913	$25,739	$26,041	$26,966	$28,003
Taylor	$23,859	$24,130	$22,921	$22,825	$24,886	$25,583	$24,456	$24,810	$25,617	$26,522
Union	$18,792	$18,280	$17,498	$18,282	$18,722	$18,971	$18,607	$18,842	$19,309	$19,929
Region	$28,912	$29,281	$28,914	$28,053	$29,096	$29,893	$29,509	$29,848	$30,556	$31,614
Florida	$39,431	$39,725	$38,641	$36,716	$37,159	$38,314	$38,541	$38,517	$39,380	$40,504

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

Illustration A-16

**Real Personal Per Capita Income
North Central Florida Region and State
Fixed 2009 Dollars
2006 to 2015**



Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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 and Levy 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 2006 to 2015, the region as a whole declined slightly relative to the nation, while the overall relative prices of the state also declined by a larger amount.

Table A-17

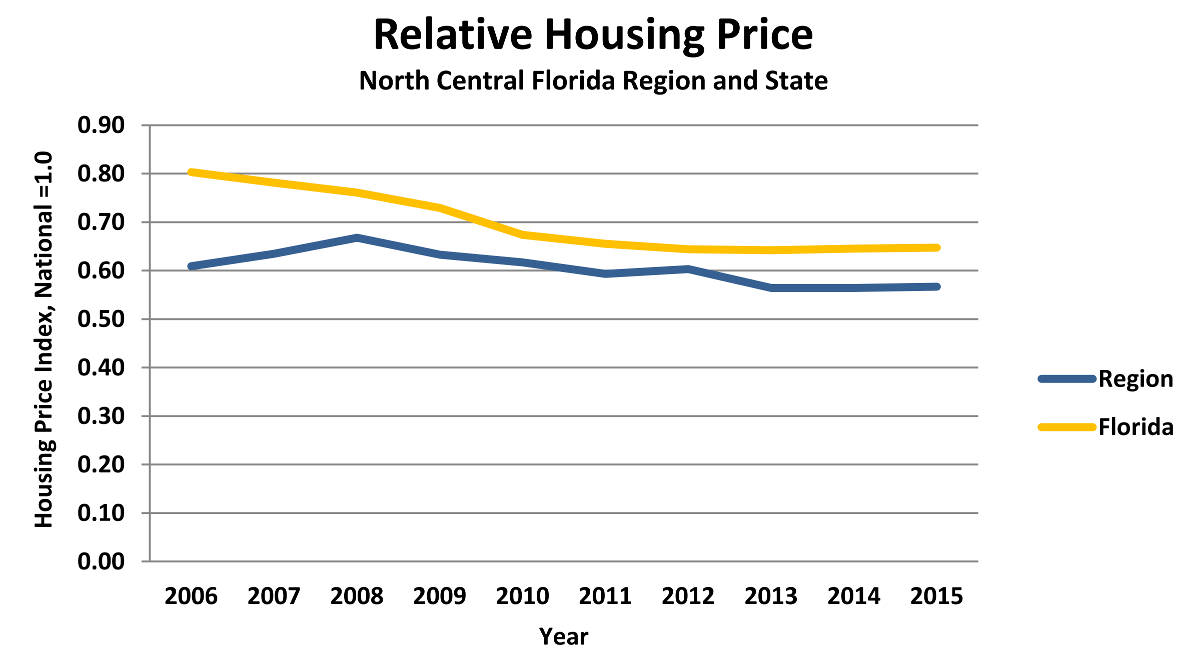
Relative Housing Price
North Central Florida Region and State
National Index = 1.0
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	0.66	0.72	0.76	0.74	0.72	0.70	0.72	0.66	0.66	0.66
Bradford	0.58	0.57	0.55	0.50	0.46	0.44	0.44	0.44	0.45	0.45
Columbia	0.53	0.45	0.57	0.48	0.49	0.44	0.41	0.41	0.41	0.41
Dixie	0.50	0.49	0.48	0.44	0.40	0.38	0.38	0.38	0.38	0.38
Gilchrist	0.55	0.54	0.53	0.48	0.44	0.42	0.42	0.42	0.42	0.42
Hamilton	0.62	0.60	0.59	0.53	0.49	0.47	0.47	0.47	0.47	0.47
Lafayette	0.63	0.62	0.60	0.55	0.51	0.48	0.48	0.48	0.49	0.49
Levy	0.69	0.72	0.75	0.77	0.78	0.79	0.78	0.74	0.73	0.72
Madison	0.45	0.44	0.43	0.39	0.36	0.34	0.34	0.34	0.34	0.34
Suwannee	0.52	0.51	0.50	0.45	0.42	0.40	0.40	0.40	0.40	0.40
Taylor	0.49	0.48	0.47	0.42	0.39	0.37	0.37	0.37	0.37	0.37
Union	0.51	0.49	0.48	0.44	0.41	0.39	0.39	0.39	0.39	0.39
Region	0.61	0.64	0.67	0.63	0.62	0.59	0.60	0.56	0.56	0.57
Florida	0.80	0.78	0.76	0.73	0.67	0.66	0.64	0.64	0.65	0.65

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

Illustration A-17

Relative Housing Price
North Central Florida Region and State
National Index = 1.0
2006 to 2015



Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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 2006 to 2015 period. However, the gap between the region and state decreased over the period, from 7.6 percent in 2006 to 6.2 percent in 2015. The largest increases in poverty rates in the region occurred in 2009 and 2012.

Table A-18

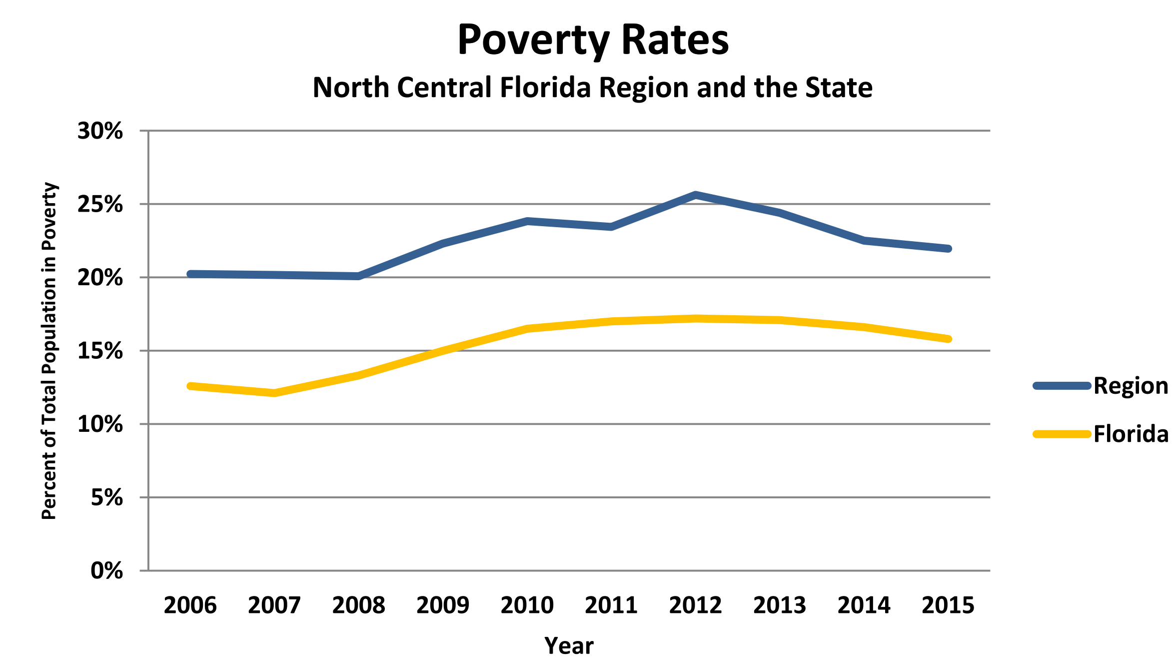
Percent of Persons Living in Poverty
North Central Florida Region and State
2006 to 2015

Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	21.8%	22.8%	20.0%	23.0%	25.3%	23.5%	26.6%	25.7%	21.6%	21.1%
Bradford	16.3%	16.9%	19.3%	22.5%	19.4%	23.1%	23.1%	21.8%	22.6%	21.3%
Columbia	18.2%	13.9%	18.0%	19.1%	19.5%	21.7%	23.4%	18.8%	21.7%	19.7%
Dixie	22.6%	21.6%	22.8%	23.7%	26.6%	25.2%	27.3%	27.1%	27.1%	29.3%
Gilchrist	17.6%	15.4%	16.8%	18.0%	21.0%	19.5%	22.0%	21.9%	19.8%	19.2%
Hamilton	24.3%	27.7%	29.3%	28.5%	30.8%	31.9%	28.9%	29.2%	31.7%	31.8%
Lafayette	22.3%	22.0%	25.6%	24.6%	26.0%	23.8%	26.4%	25.2%	25.6%	23.8%
Levy	17.8%	18.5%	17.8%	21.8%	27.0%	22.0%	22.7%	23.6%	21.2%	22.1%
Madison	20.9%	21.0%	23.6%	26.2%	23.4%	25.9%	25.6%	28.9%	27.7%	27.0%
Suwannee	18.1%	17.8%	19.9%	19.7%	20.9%	24.7%	28.1%	24.6%	23.7%	23.6%
Taylor	20.6%	18.5%	22.9%	23.8%	20.6%	22.7%	24.2%	23.9%	23.4%	21.2%
Union	19.4%	21.5%	23.6%	26.5%	24.3%	25.3%	26.2%	23.8%	24.3%	26.2%
Region	20.2%	20.2%	20.1%	22.3%	23.8%	23.4%	25.6%	24.4%	22.5%	22.0%
Florida	12.6%	12.1%	13.3%	15.0%	16.5%	17.0%	17.2%	17.1%	16.6%	15.8%

Source: U.S. Census Bureau, Small Area Income and Poverty Estimates
<https://www.census.gov/did/www/saipe/data/interactive/saipe.html>

Illustration A-18

Percent of Persons Living in Poverty
North Central Florida Region and State
2006 to 2015



Source: U.S. Census Bureau, Small Area Income and Poverty Estimates

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

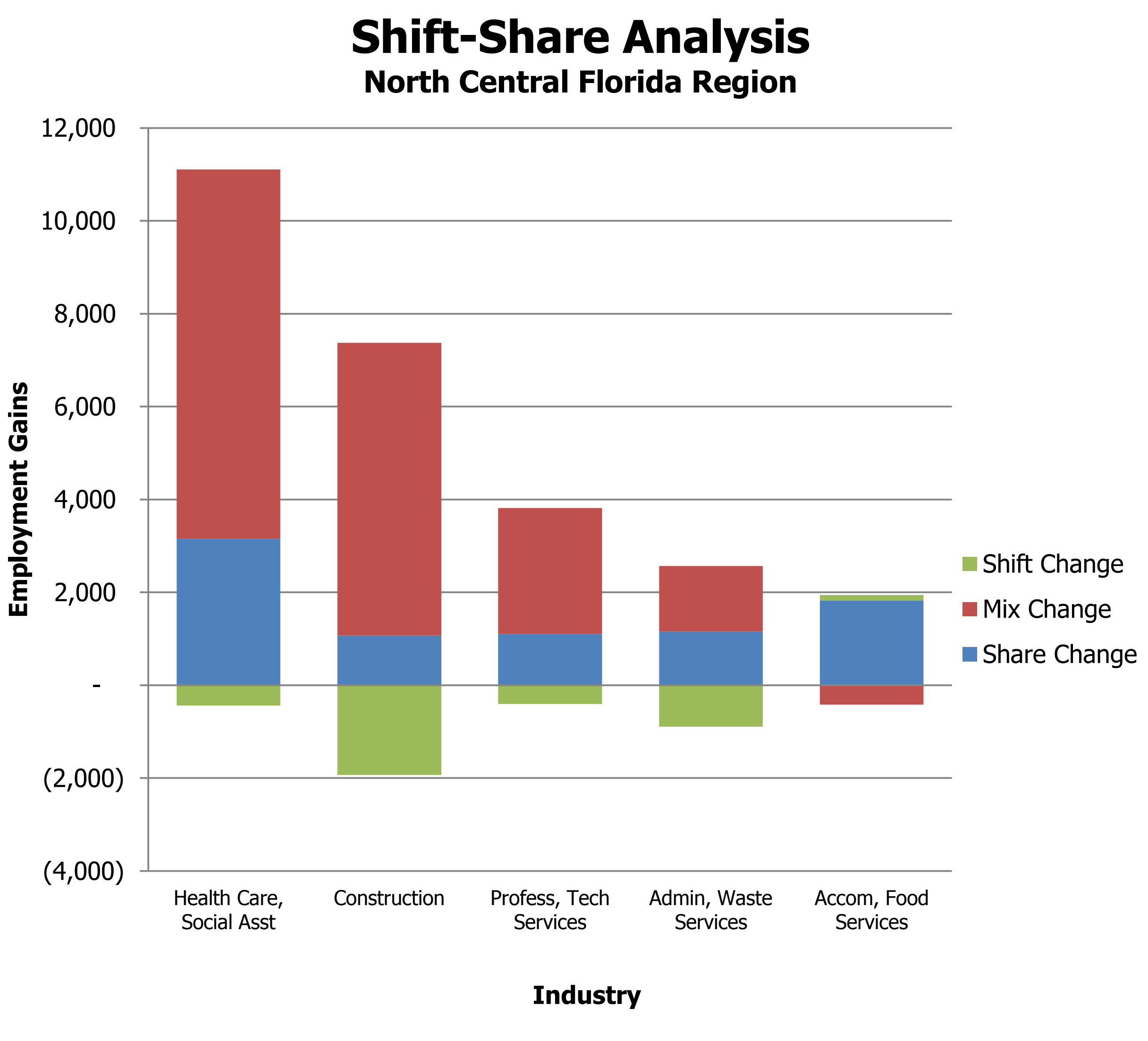
n = the number of years i = specific industry

Illustration A-19 demonstrates the components of the estimated employment gains in the top five industries in the north central Florida region from 2015 to 2035 based upon the Shift-Share analysis.

As shown in Illustration A-19, the largest projected employment gains are anticipated be in Health Care, Construction, Professional and Technical Services, Administration including Waste Services and Accommodation and Food Services. The combined employment gains in these five industries are projected to exceed 22,000 new jobs in the region by 2035, which accounts for 88 percent of the total anticipated employment gains.

Illustration A-19

Shift-Share Analysis
North Central Florida Region
Top Five Projected Industry Employment Gains
2015 to 2035



Source: Regional Economic Modeling, Inc. , PI+, Florida Counties, v1.7

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. Construction 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
2015 to 2035

Industry	2015 to 2035			
	Share Change	Mix Change	Shift Change	Shift-Share Change
Health Care, Social Asst	3,156	7,949	(438)	10,668
Construction	1,070	6,304	(1,931)	5,443
Professional, Tech Services	1,106	2,710	(404)	3,412
Admin, Waste Services	1,156	1,412	(892)	1,676
Accom, Food Services	1,824	(414)	119	1,528
State & Local Gov	5,308	(5,259)	1,215	1,264
Real Estate, Rental, Leasing	851	(77)	257	1,031
Educational Services	326	76	60	462
Other Services (excl Gov)	1,292	(1,697)	533	127
Arts, Enter, Rec	407	24	(364)	67
Transp, Warehousing	759	(1,072)	373	60
Mining	126	(1)	(80)	45
Retail Trade	2,541	(3,169)	659	30
Finance, Insurance	881	(1,097)	215	(2)
Federal Military	95	(211)	0	(117)
Wholesale Trade	510	(727)	45	(172)
Mngmt of Co, Enter	149	(437)	47	(241)
Manufacturing	1,246	(3,487)	1,869	(372)
Utilities	111	(505)	(96)	(490)
Federal Civilian	541	(1,267)	0	(726)
Forestry, Fishing, Other	298	(1,129)	(124)	(955)
Information	249	(848)	(393)	(992)
Total:	**24,002**	**(2,924)**	**670**	**21,748**

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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
2015 to 2035

Industry	2015 to 2035 Share Change
State & Local Gov	5,308
Health Care, Social Asst	3,156
Retail Trade	2,541
Accom, Food Services	1,824
Other Services (excl Gov)	1,292
Manufacturing	1,246
Admin, Waste Services	1,156
Professional, Tech Services	1,106
Construction	1,070
Finance, Insurance	881
Real Estate, Rental, Leasing	851
Transp, Warehousing	759
Federal Civilian	541
Wholesale Trade	510
Arts, Enter, Rec	407
Educational Services	326
Forestry, Fishing, Other	298
Information	249
Mngmt of Co, Enter	149
Mining	126
Utilities	111
Federal Military	95
Total:	**24,002**

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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 a slight contraction in overall employment 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
2015 to 2035

Industry	2015 to 2035 Mix Change
Health Care, Social Asst	7,949
Construction	6,304
Professional, Tech Services	2,710
Admin, Waste Services	1,412
Educational Services	76
Arts, Enter, Rec	24
Mining	(1)
Real Estate, Rental, Leasing	(77)
Federal Military	(211)
Accom, Food Services	(414)
Mngmt of Co, Enter	(437)
Utilities	(505)
Wholesale Trade	(727)
Information	(848)
Transp, Warehousing	(1,072)
Finance, Insurance	(1,097)
Forestry, Fishing, Other	(1,129)
Federal Civilian	(1,267)
Other Services (excl Gov)	(1,697)
Retail Trade	(3,169)
Manufacturing	(3,487)
State & Local Gov	(5,259)
Total:	**(2,924)**

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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
2015 to 2035

	2015 to 2035
Industry	**Shift Change**
Manufacturing	1,869
State & Local Gov	1,215
Retail Trade	659
Other Services (excl Gov)	533
Transp, Warehousing	373
Real Estate, Rental, Leasing	257
Finance, Insurance	215
Accom, Food Services	119
Educational Services	60
Mngmt of Co, Enter	47
Wholesale Trade	45
Federal Civilian	0
Federal Military	0
Mining	(80)
Utilities	(96)
Forestry, Fishing, Other	(124)
Arts, Enter, Rec	(364)
Information	(393)
Professional, Tech Services	(404)
Health Care, Social Asst	(438)
Admin, Waste Services	(892)
Construction	(1,931)
Total:	**670**

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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

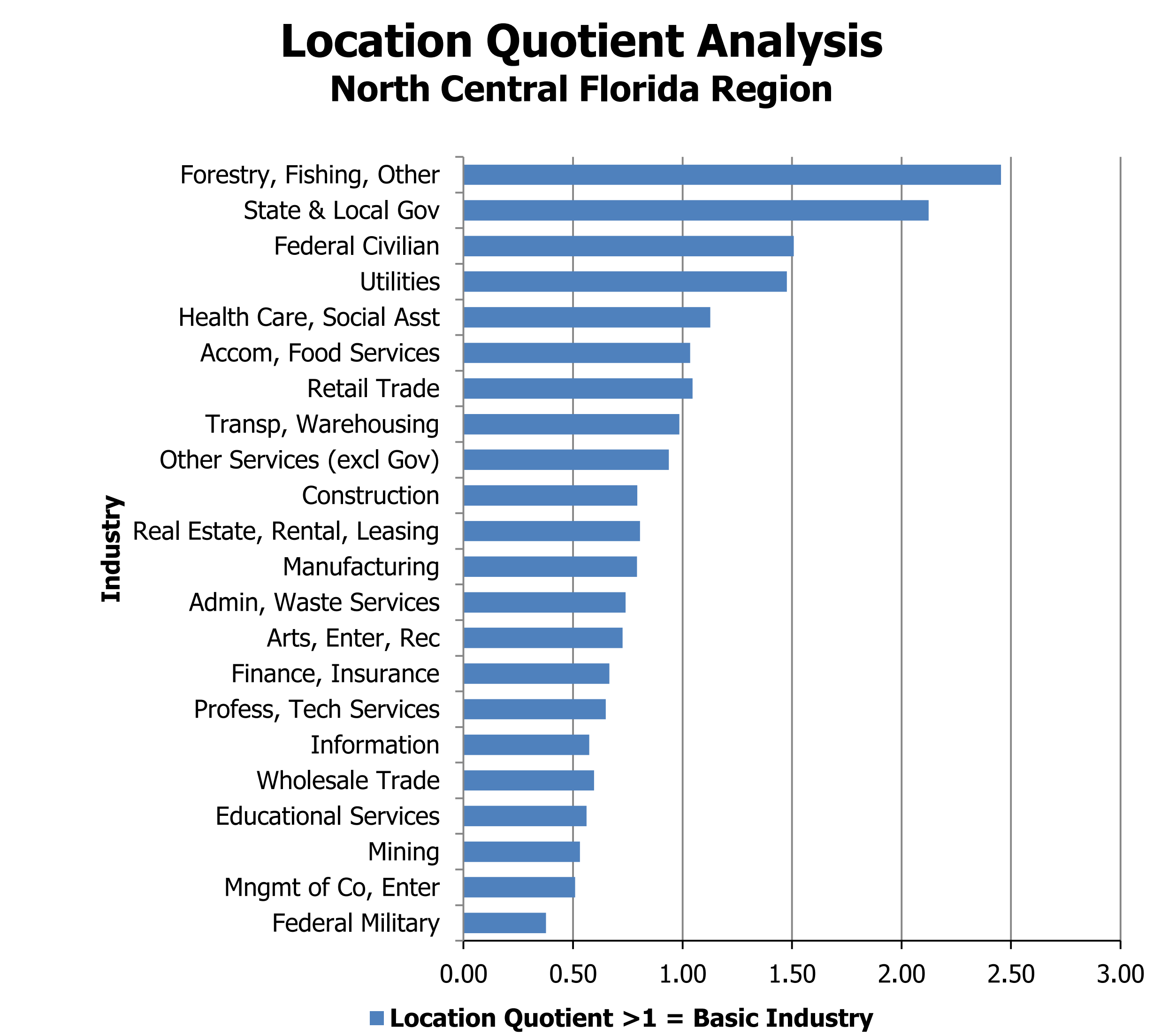
E_i = Reference area employment in industry i E_i = Total reference area employment

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
2015



Source: Regional Economic Modeling, Inc., PI+, Florida Counties v1.7

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 2035. The industries are ranked highest to lowest by their location quotient scores in 2015. 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
2015 to 2035

Industry	Year				
	2015	2020	2025	2030	3035
Forestry, Fishing, Other	2.52	2.45	2.43	2.41	2.41
State & Local Gov	2.11	2.12	2.15	2.16	2.18
Federal Civilian	1.53	1.51	1.51	1.52	1.54
Utilities	1.52	1.48	1.43	1.39	1.36
Health Care, Social Asst	1.13	1.13	1.13	1.12	1.13
Accom, Food Services	1.03	1.03	1.04	1.04	1.05
Retail Trade	1.03	1.05	1.05	1.06	1.06
Transp, Warehousing	0.97	0.99	1.00	1.01	1.02
Other Services (excl Gov)	0.92	0.94	0.95	0.96	0.96
Construction	0.82	0.79	0.77	0.75	0.74
Real Estate, Rental, Leasing	0.80	0.81	0.81	0.82	0.83
Manufacturing	0.76	0.79	0.81	0.85	0.89
Admin, Waste Services	0.75	0.74	0.73	0.72	0.71
Arts, Enter, Rec	0.75	0.73	0.71	0.70	0.70
Finance, Insurance	0.67	0.67	0.67	0.67	0.69
Profess, Tech Services	0.65	0.65	0.65	0.64	0.64
Information	0.60	0.57	0.54	0.52	0.49
Wholesale Trade	0.59	0.60	0.60	0.60	0.60
Educational Services	0.57	0.56	0.56	0.57	0.58
Mining	0.54	0.53	0.50	0.50	0.52
Mngmt of Co, Enter	0.50	0.51	0.51	0.52	0.52
Federal Military	0.38	0.38	0.38	0.38	0.38

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

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 14,000 jobs in 2015. The number of jobs in logistics and distribution in the region grew by 30.4 percent between 2005 and 2015, well above the national growth rate of 7.7 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 Mega Industrial 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.

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. 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, HAECO 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 28 percent between 2006 and 2015 while in the region the growth rate of the industry was nearly 19 percent, which equates to approximately 5,400 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 Opportunity. 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. Eleven of the 12 counties in the North Central Florida Economic Development District are also located within the 14-county North Central Rural Area of Opportunity. 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, Inc. was formed to oversee the Catalyst Sites project and to implement economic development programs for the North Central Florida Rural Area of Opportunity. The Partnership is comprised of local economic developers, county commissioners, workforce development boards, regional planning councils and private businesses.

The 2,622-acre North Florida Mega Industrial Park is a master planned site owned by Weyerhaeuser, and part of the Port of Jacksonville Foreign Trade Zone. The North Florida Mega Industrial 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 approximately 500 acres and is located at the intersection of Interstate 10 and U.S. Highway 90 northwest of Live Oak. Klausner Lumber One, a building component manufacture with approximately 350 employees is located on the site. It is anticipated that additional economic development projects will occur on the site in the future.

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
(V20.1, 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, play, 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 and sustain employment in Florida.
- Foster opportunities for prosperity.
- Grow businesses.
- Expand global commerce.
- Increase Florida's attractiveness to workers, residents, and visitors.

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. Strengthen Florida's economic regions and connect resources 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 foster employment opportunities and develop and retain talented workers with the skills to meet current and future employer needs.	9. Strengthen Florida's leadership in expanding and emerging talent and innovation clusters and transitioning established clusters to serve new markets.	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.	18. Revise permitting, development, and other regulatory processes to meet changing business needs and provide a predictable legal and regulatory environment.	24. Support and sustain statewide and regional partnerships to accomplish Florida's economic and quality of life goals.	27. Create and sustain vibrant, safe, and healthy communities that attract workers, residents, businesses, and visitors.
6. Develop an integrated pre-K through career education system to prepare students for becoming successful workers or entrepreneurs.	10. Grow, sustain, and integrate efforts related to research and development, technology transfer and commercialization, and capital to create, nurture, and expand innovation businesses.	14. Develop and maintain multimodal, interconnected trade and transportation systems to support a prosperous, globally competitive economy.	19. Ensure state, regional, and local agencies provide collaborative, seamless, consistent, and timely customer service to businesses and workers.	25. Improve the efficiency and effectiveness of government agencies at all levels.	28. Ensure Florida's environment and quality of life are sustained and enhanced by future growth plans and development decisions.
7. Lead the nation in science, technology, engineering, and mathematics (STEM) research, education, and market-relevant technical skills.	11. Expand the number of Florida businesses selling goods and services internationally, and diversify the markets they serve.	15. Develop and maintain a cutting-edge telecommunications infrastructure.	20. Reduce barriers to small/minority business and entrepreneurial growth.	26. Invest in strategic statewide and regional economic development priorities.	29. Promote, develop, protect, and leverage Florida's natural, art, and cultural assets in a sustainable manner.
8. Expand access to education and training programs for talent in distressed markets.	12. Brand and consistently market Florida as the best state for business.	16. Ensure the future supply and quality of water to meet Florida's economic and quality of life goals.	21. Expand opportunities for access to capital for businesses throughout their life-cycle.		
		17. Develop and maintain diverse, reliable, and cost effective energy sources and systems to meet Florida's economic and environmental goals.	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.		

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 $5.0 million contribution from the University of Florida. In 2017, a 50,000-square-foot facility addition is being constructed with an $8.0 million grant from the U.S. Economic Development Administration and a $9.0 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.

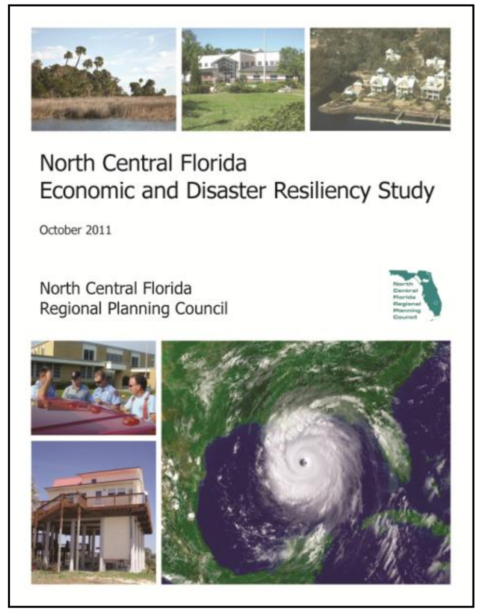
**Perry Center for Emerging Technologies
Electronics Lab, Alachua**

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, PI+, 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.

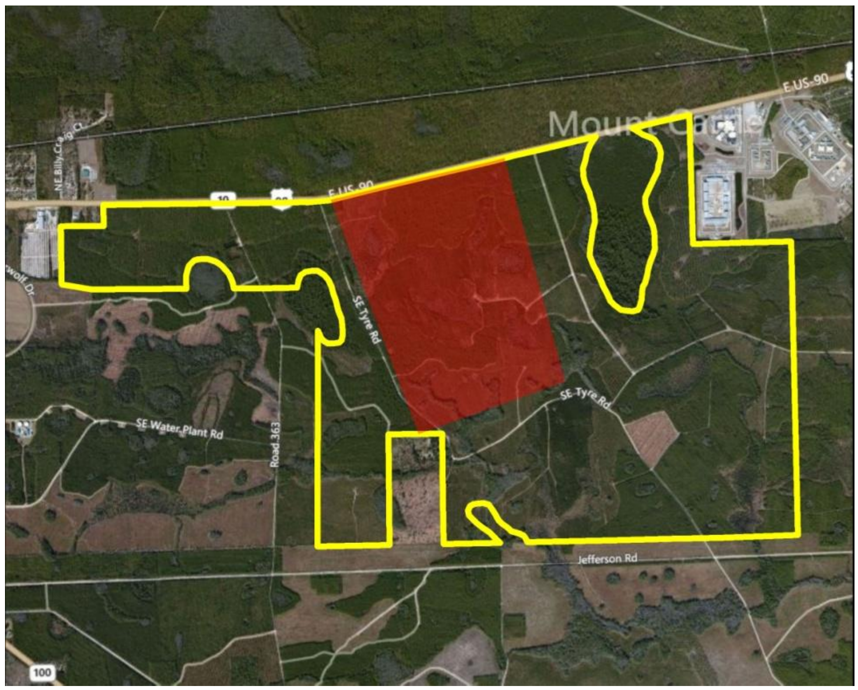
At the heart of the Innovation Square community is a business super incubator that connects entrepreneurs with working capital, attracts the smartest people for a well-trained workforce of tomorrow, and establishes new relationships with forward-thinking companies to change the way residents live, work 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.

Innovation Square Master Plan, Gainesville

ii. North Florida Mega Industrial Park/Columbia County Catalyst Site

The North Florida Mega Industrial Park is anchored by a 500-acre tract of land owned by Weyerhaeuser. The State has designated the tract as a catalyst site within the North Central Rural Area of Opportunity. The Catalyst Site is part of a larger 2,622-acre Weyerhaeuser 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.

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 Mega Industrial 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.

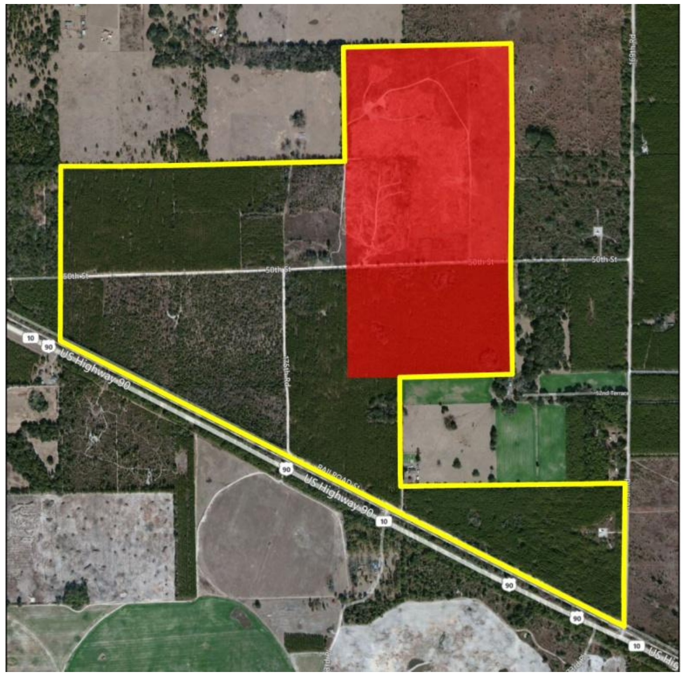


Catalyst Site, Columbia County

Weyerhaeuser retained the site location firm, McCallum Sweeney Consulting Services, to evaluate the Mega Industrial Park site for certification as a Mega Site. As a result of this evaluation, the Mega Industrial Park has received Mega Site designation by McCallum Sweeney Consulting Services. Mega site certification pre-qualifies the Mega Industrial 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 Opportunity. 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 continues.



Catalyst Site, Suwannee County

iv. Florida Energy Resiliency Strategy

Solar farm, Gainesville

Regional planning councils throughout the state worked on the development of a Florida Energy Resiliency Strategy that examined both statewide and regional energy issues. Objectives of the program included 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 included 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 was 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 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 as well as projects which improve the economic resiliency of the region to natural and man-made disasters

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 have entered into a ten-year agreement for the College to provide management for the 30,000 square foot Gainesville Technology Entrepreneurship Center located in East Gainesville. The shared vision repositions 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 is 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 is an effort to situate a prototyping laboratory and an office for community technology transfer within the Gainesville Technology Entrepreneurship 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

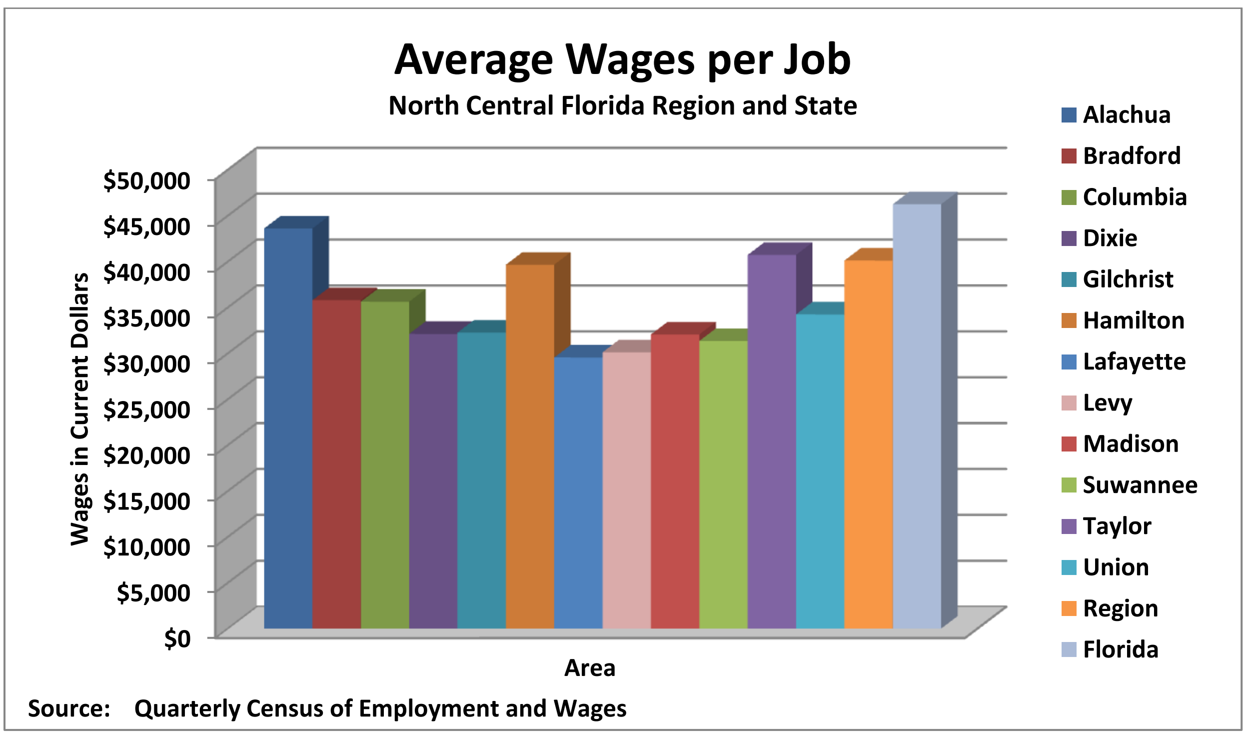
1. Talent Supply & Education

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 2015, overall average wages per job across the region were more than $6,000 short of state average wages.

Illustration C-1

Average Annual Wages per Job
North Central Florida Region and State
Current Dollars
2015

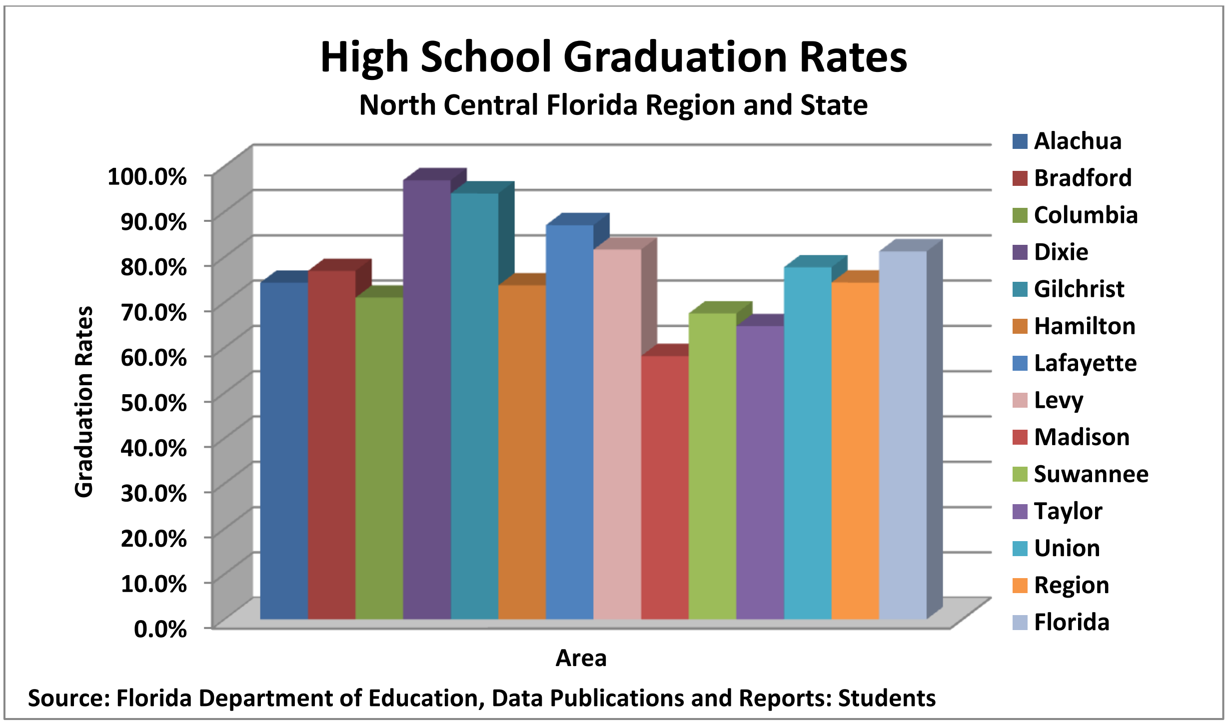


b. High School Graduation Rates

As shown in Illustration C-2, during the 2014-15 school year the high school graduation rate for the region was only slightly less than the state rate. Four counties, Dixie, Gilchrist, Lafayette and Union have high school graduation rates higher that of the state, while the remaining eight counties were below the state rate.

Illustration C-2

High School Graduation Rates
North Central Florida Region and State
School Year 2014-15

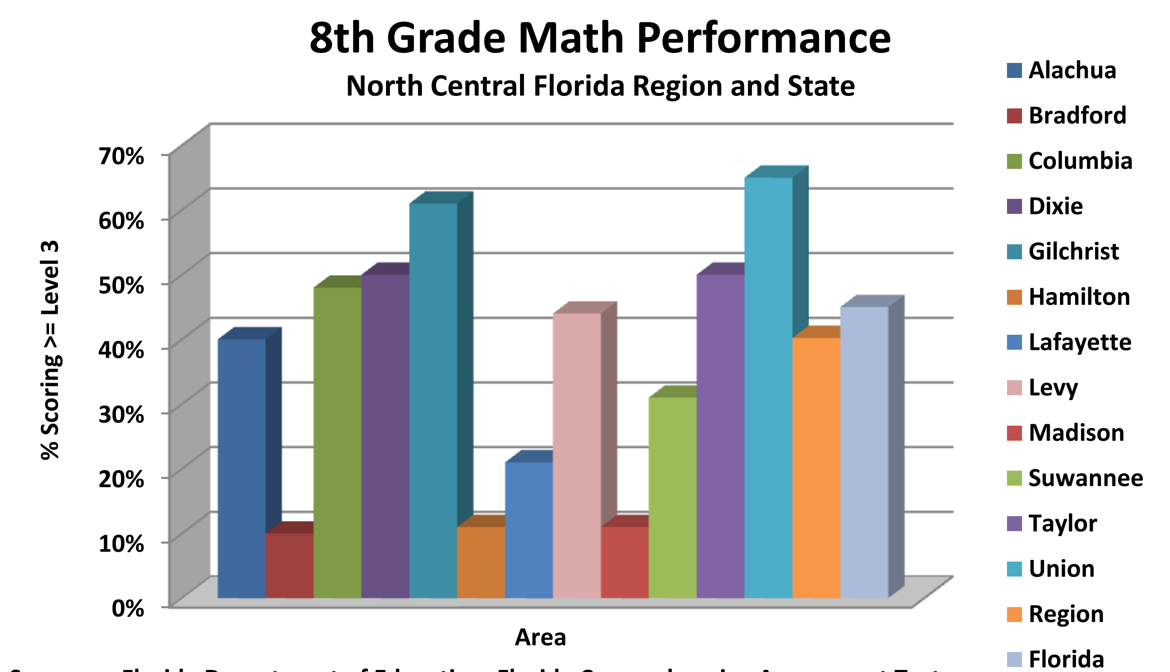


c. 8th Grade Math Performance

As shown in Illustration C-3, in 2015, the 8th grade math performance on the Florida Comprehensive Assessment Test of the region lagged behind that of the state. However, Columbia, Dixie, Gilchrist, Taylor and Union 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
2015



Source: Florida Department of Education, Florida Comprehensive Assessment Test

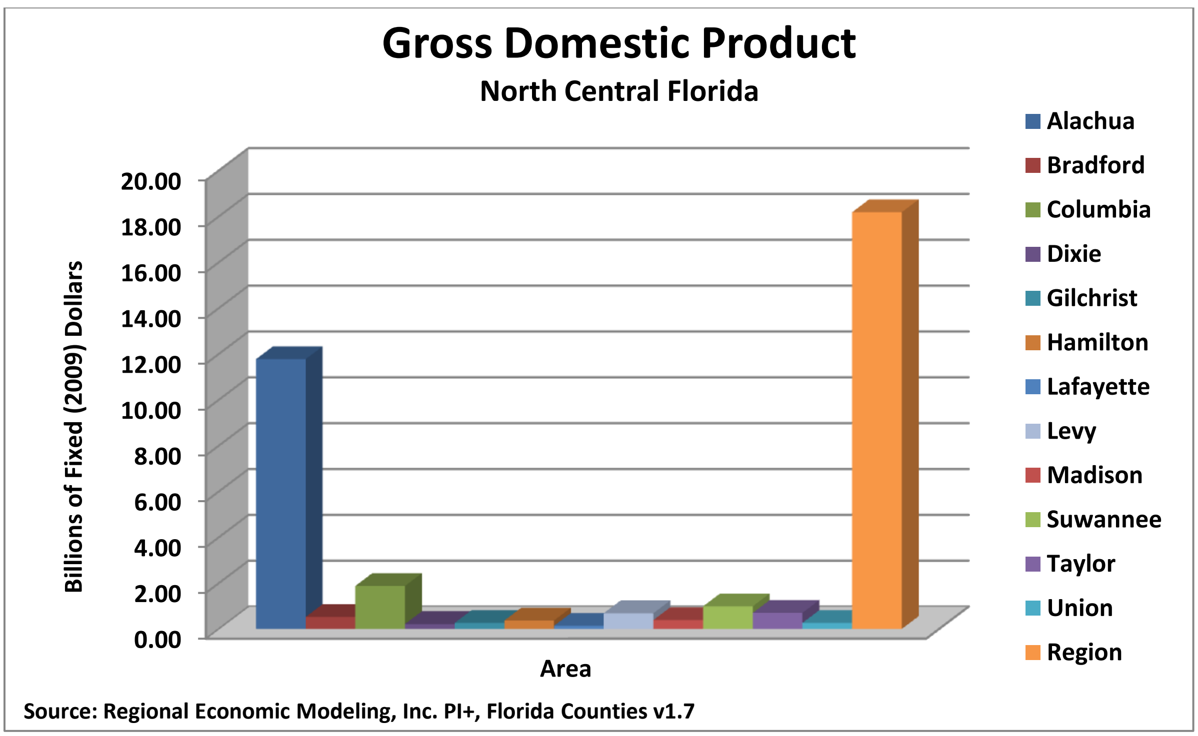
2. Innovation & Economic Development

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 2009 Dollars
2015

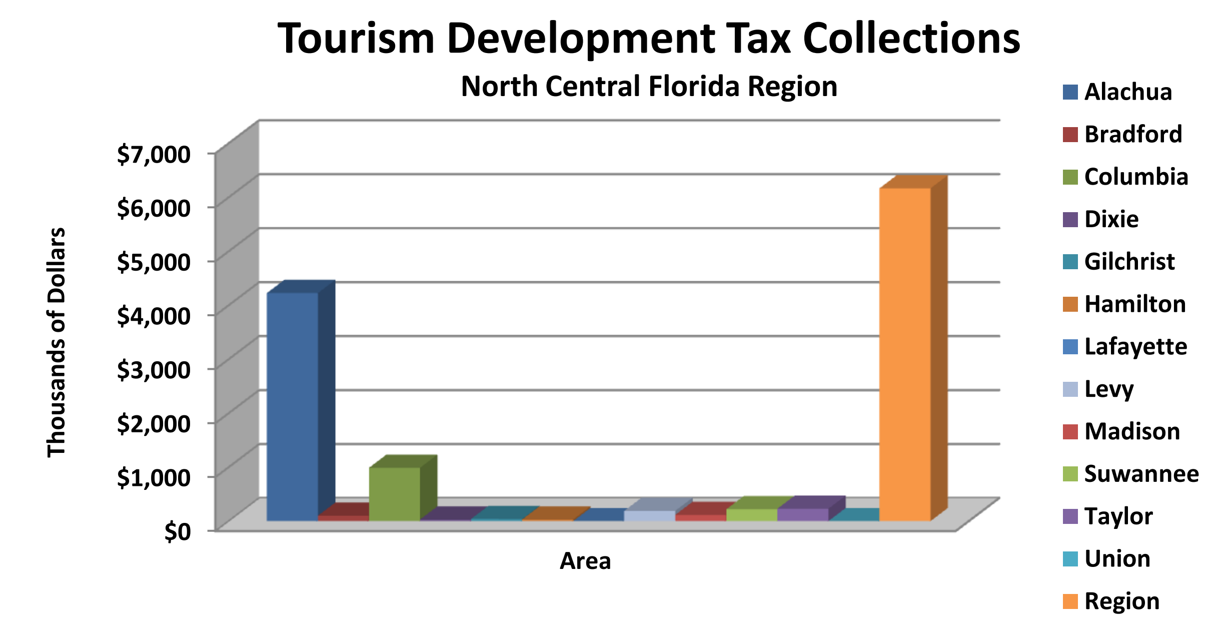


b. Bed Tax Collections

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 11 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 2014-15



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 30 percent of all exported goods and services from the region, followed by Columbia County with 22 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 2009 Dollars
2015

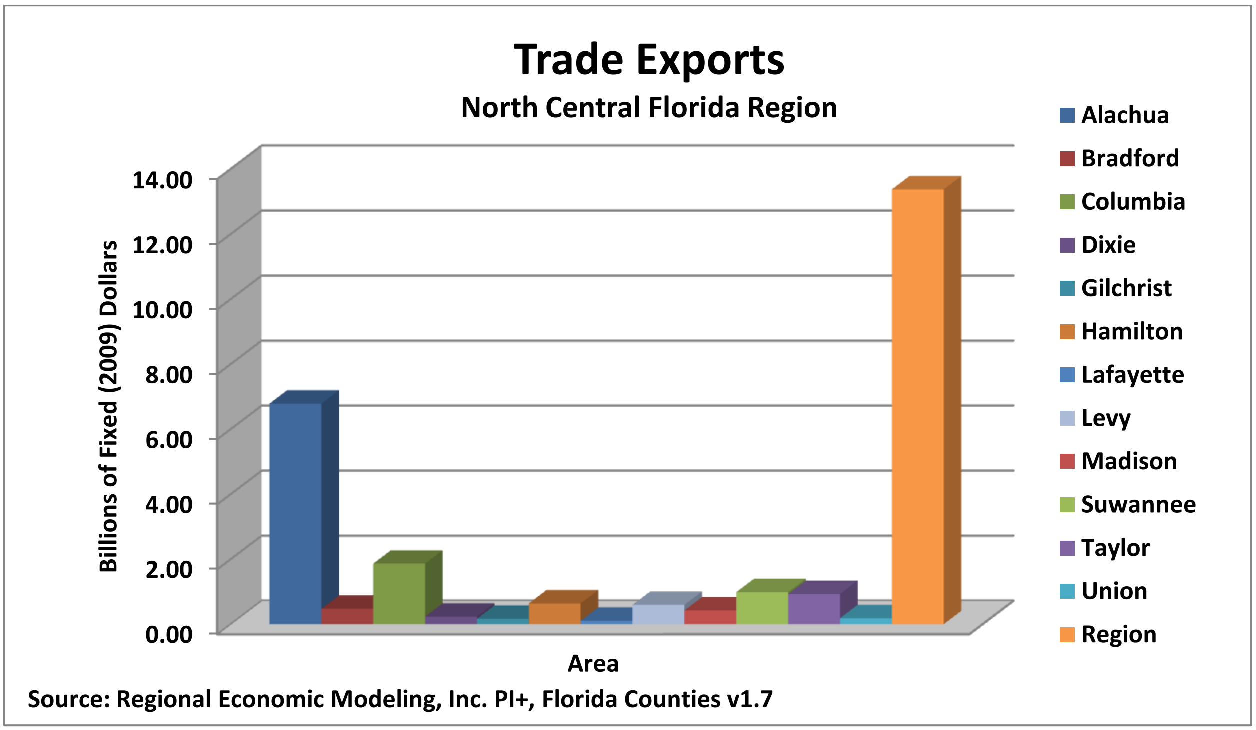
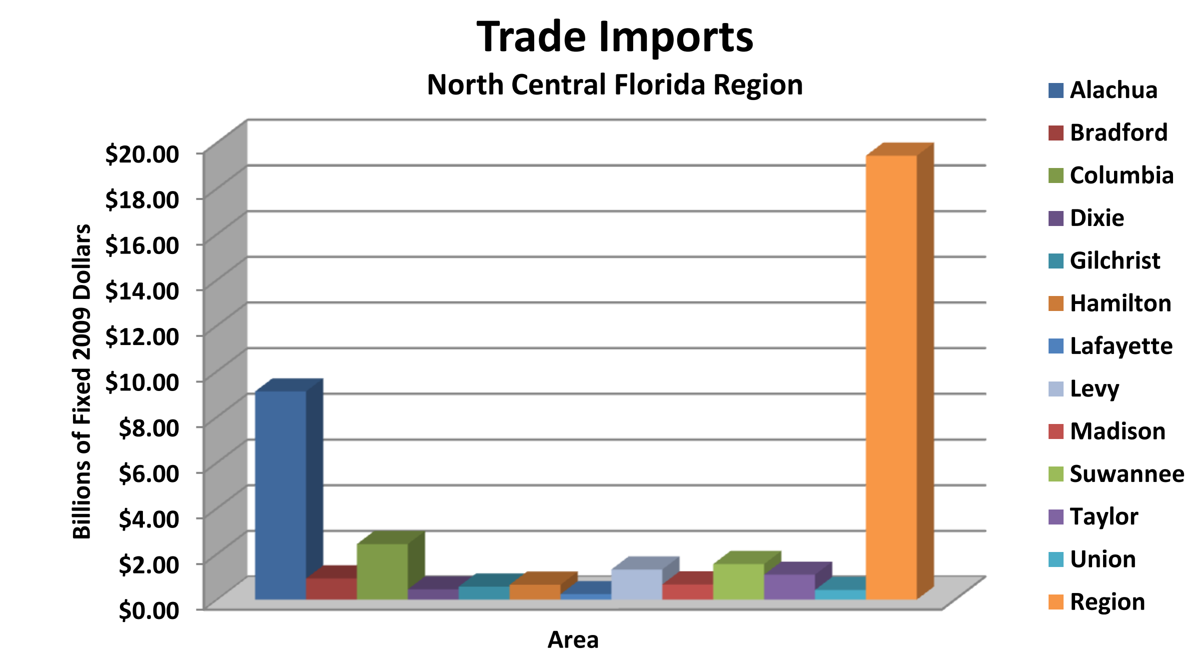


Illustration C-6b shows that Alachua and Columbia Counties are the two largest importers of goods and services in the region, accounting for 30 percent and 18 percent respectively. In 2015, the region imported $6.1 billion more than it exported, meaning that the region as a whole is a net importer of goods and services, as are each of the counties within the region.

Illustration C-6b

Trade Imports
North Central Florida Region
Billions of Fixed 2009 Dollars
2015



Source: Regional Economic Modeling, Inc. PI+, Florida Counties v1.7

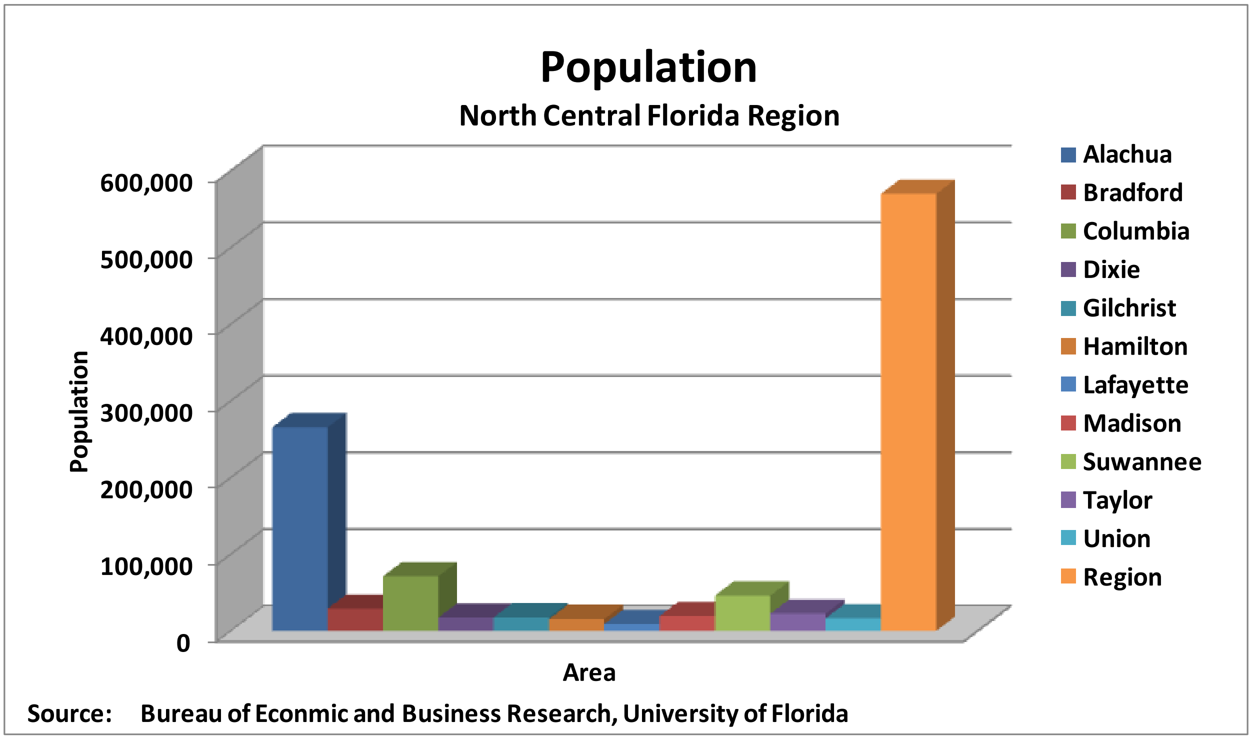
3. Infrastructure & Growth Leadership

a. Population Counts, Estimates and Projections

Illustration C-7 shows that in 2015, the region had nearly 540,000 residents, and that 45 percent 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
2015

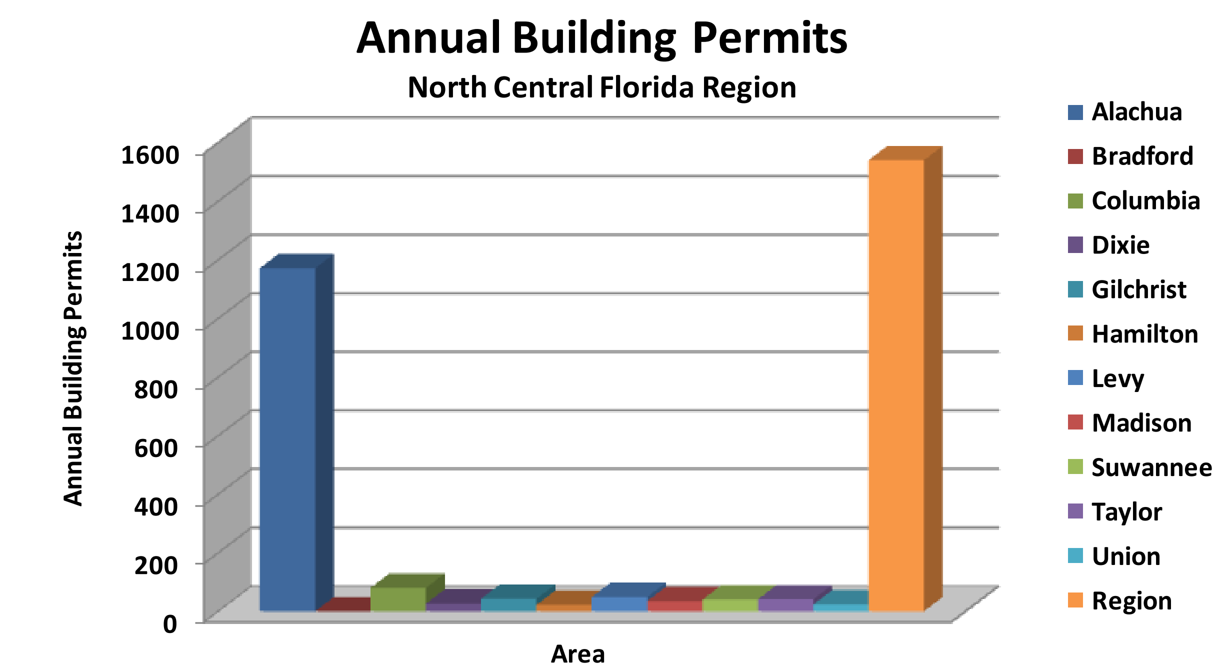


b. Building Permits

Illustration C-8 shows that in 2015, three-fourths 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 2007, 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 less than half the number of permits obtained in 2006.

Illustration C-8

Annual Building Permits
North Central Florida Region
Residential Units
2015



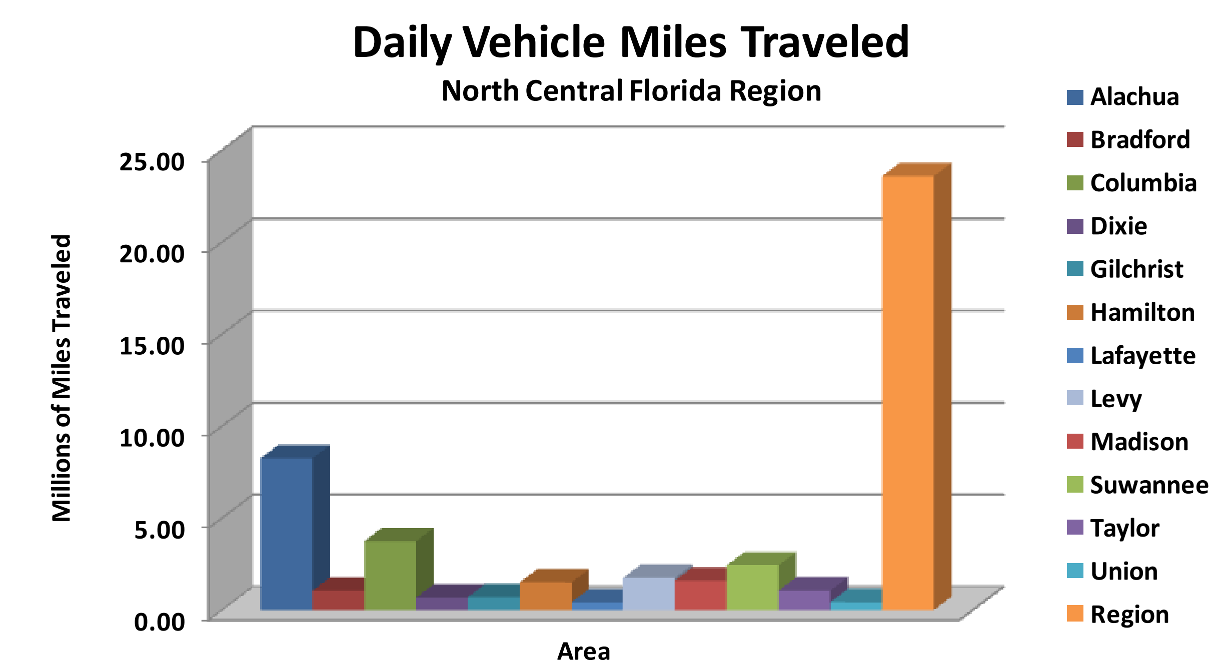
Source: https://socds.huduser.gov/permits/index.html

c. Vehicle Miles Traveled

Illustration C-9 shows average daily vehicle miles traveled in the region. Four of the five counties with the highest traffic volumes in the region, Alachua, Columbia, Suwannee and Hamilton, are bisected by interstate highways. Levy County, with the fourth-highest traffic volume in the region, does not have an interstate highway.

Illustration C-9

Daily Vehicle Miles Traveled
North Central Florida Region
Millions of Miles
2015



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

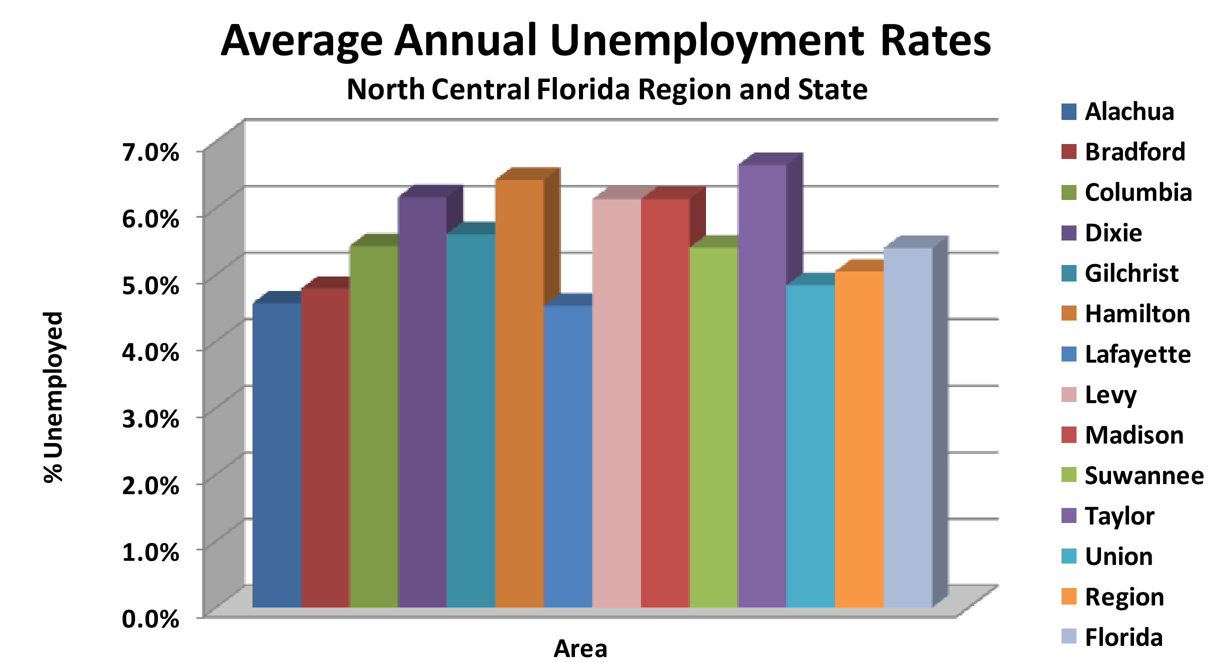
4. Business Climate & Competitiveness

a. Average Annual Unemployment Rates

Illustration C-10 shows the average unemployment rate for the region and state. In 2015, average annual unemployment in the counties within the region ranged from a low of 4.5 percent in Lafayette County to a high of 6.6 percent in Taylor County. Overall, the regional annual unemployment rate of 5.0 percent was slightly less than the 5.4 percent state rate.

Illustration C-10

Average Annual Unemployment Rates
North Central Florida Region and State
2015

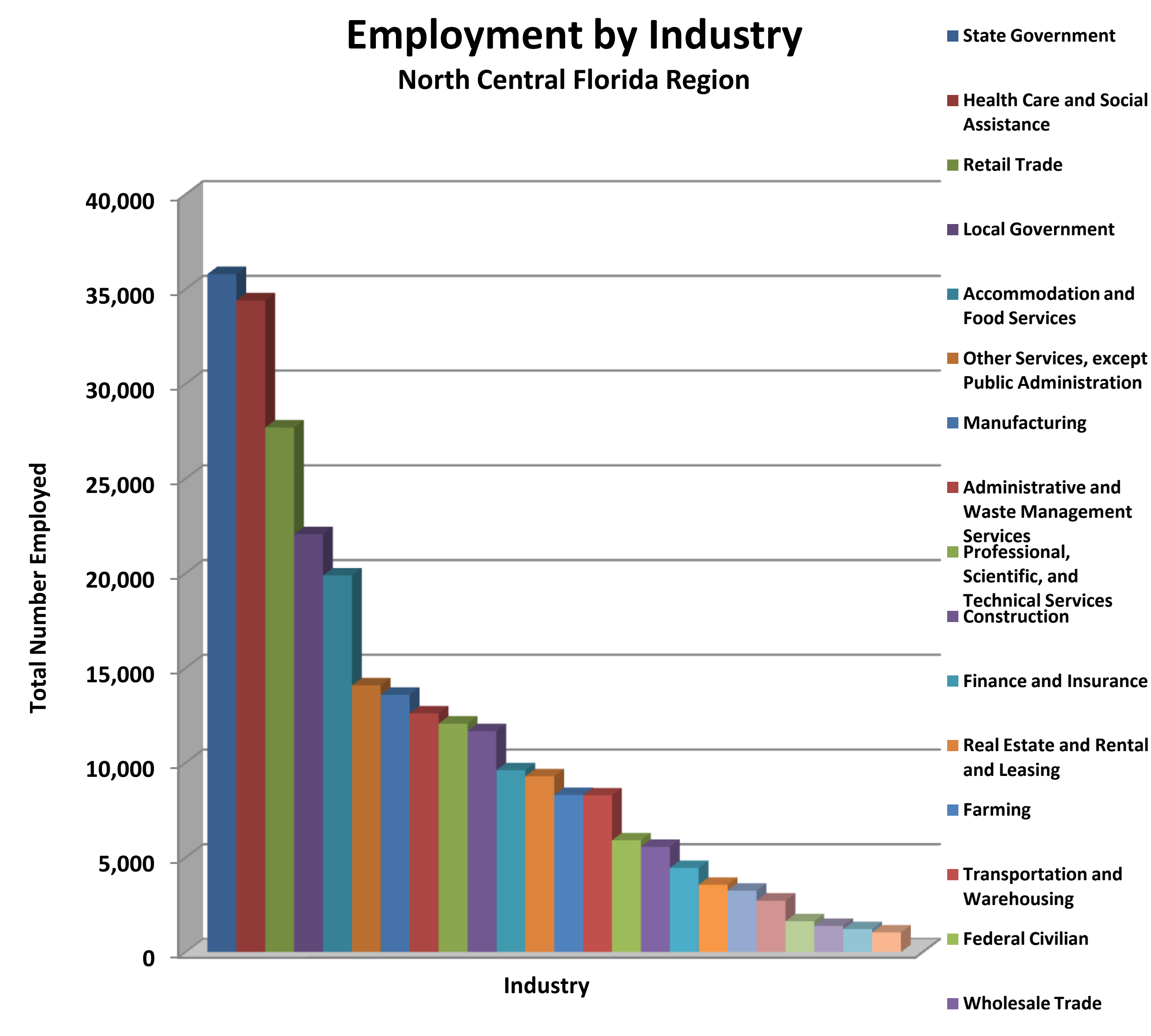


Source: Florida Department of Economic Opportunity Local Area Unemployment Statistics

b. Employment by Industry

Illustration C-11a

**Employment by Industry
North Central Florida Region
2015**



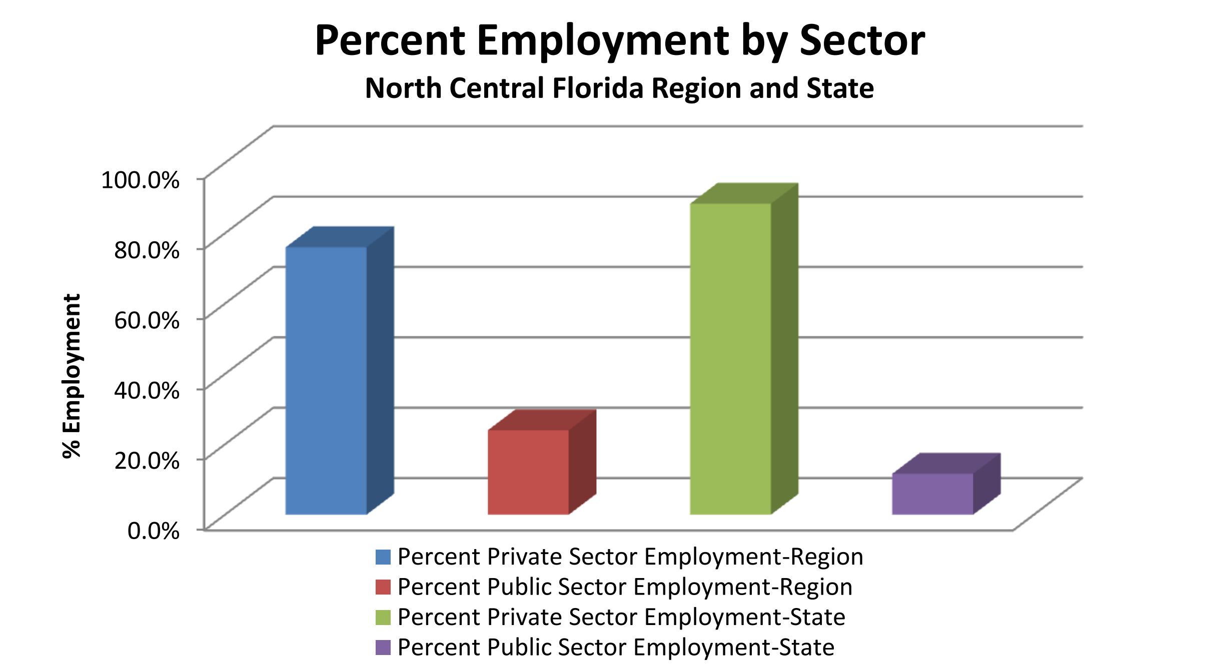
Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

Illustration C-11a above shows that in 2015, 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 58.4 percent of total employment in the region.

Illustration C-11b shows percent employment by sector. In 2015, 76.0 percent were employed in the private sector, as opposed to 24.0 percent in the public sector, which is more than double the overall state employment in the public sector of 11.6 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
2015

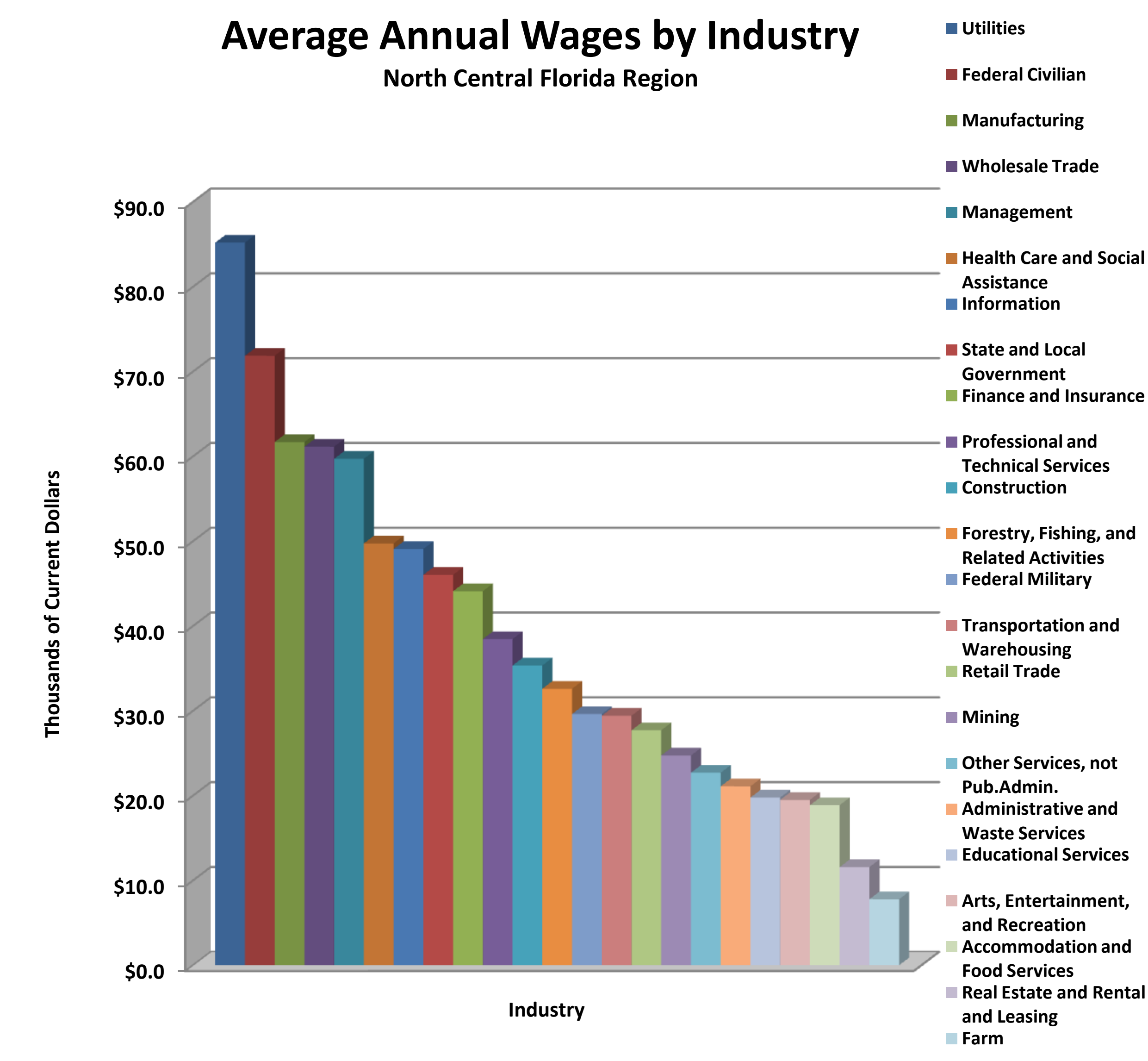


Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

c. Wages by Industry

Illustration C-12a

Average Annual Wages by Industry
North Central Florida Region
Thousands of Current Dollars
2015



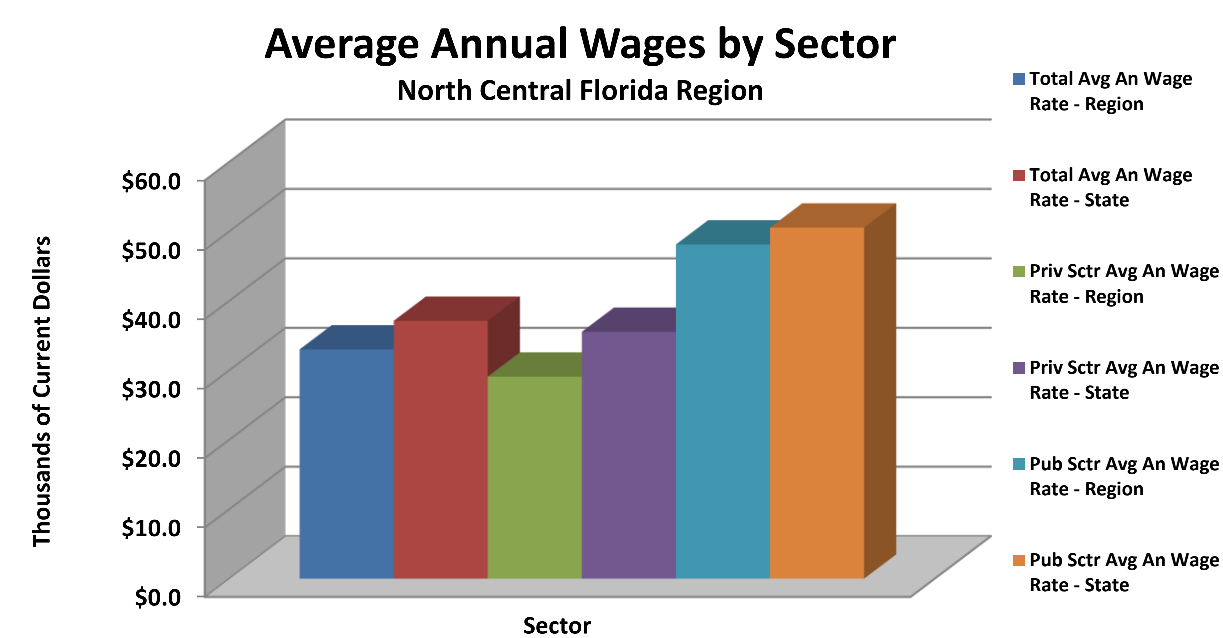
Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

Illustration C-12a above shows that in 2015, the Utilities and Federal Civilian 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 2015, 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 22 percent less that state average wages, while public sector average annual wages were 5 percent below state averages.

Illustration C-12b

Average Annual Wages by Sector
North Central Florida Region
Thousands of Current Dollars
2015



Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

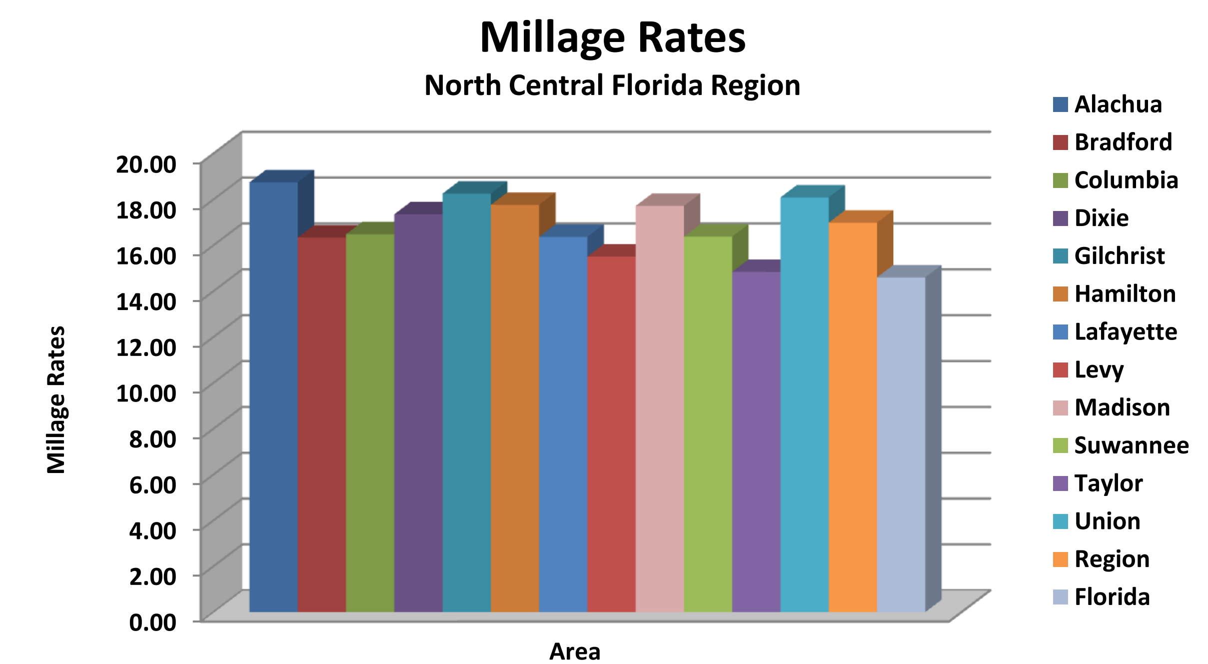
5. Civic & Governance Systems

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
2015



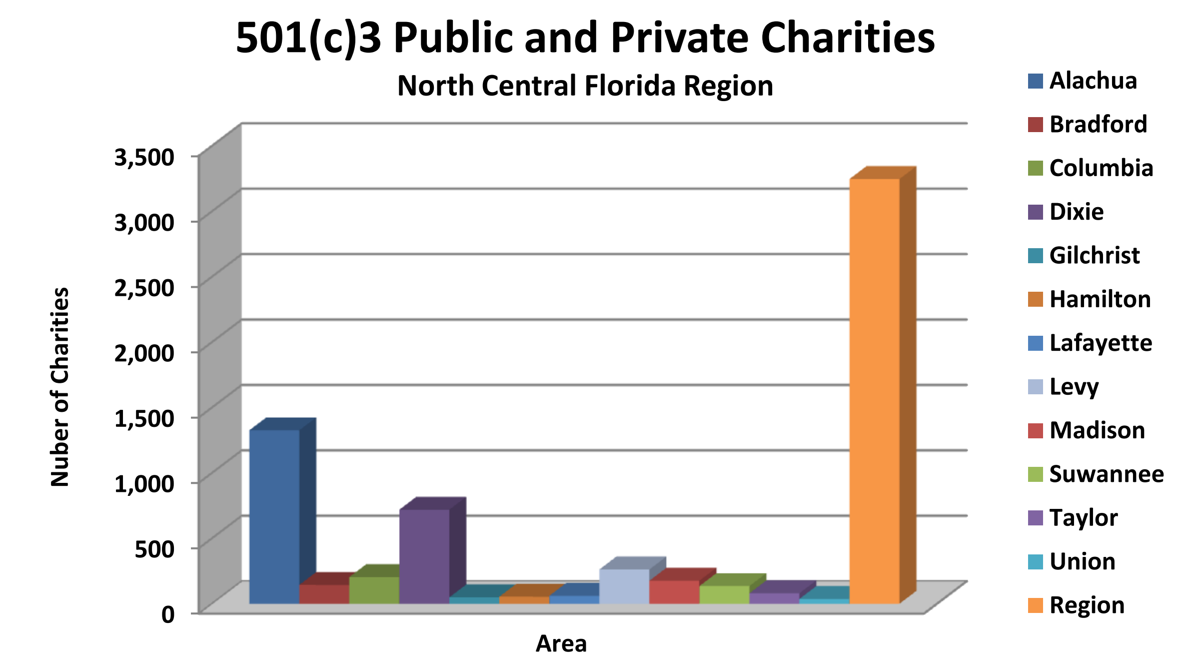
Source: Florida Department of Revenue, Millage and Taxes Levied Report

b. Registered Nonprofit Organizations

Illustration C-14 shows that in 2015, the majority of charitable organizations are located within Alachua, Columbia and Dixie Counties. When combined, the top three counties represent 69.3 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
2015`



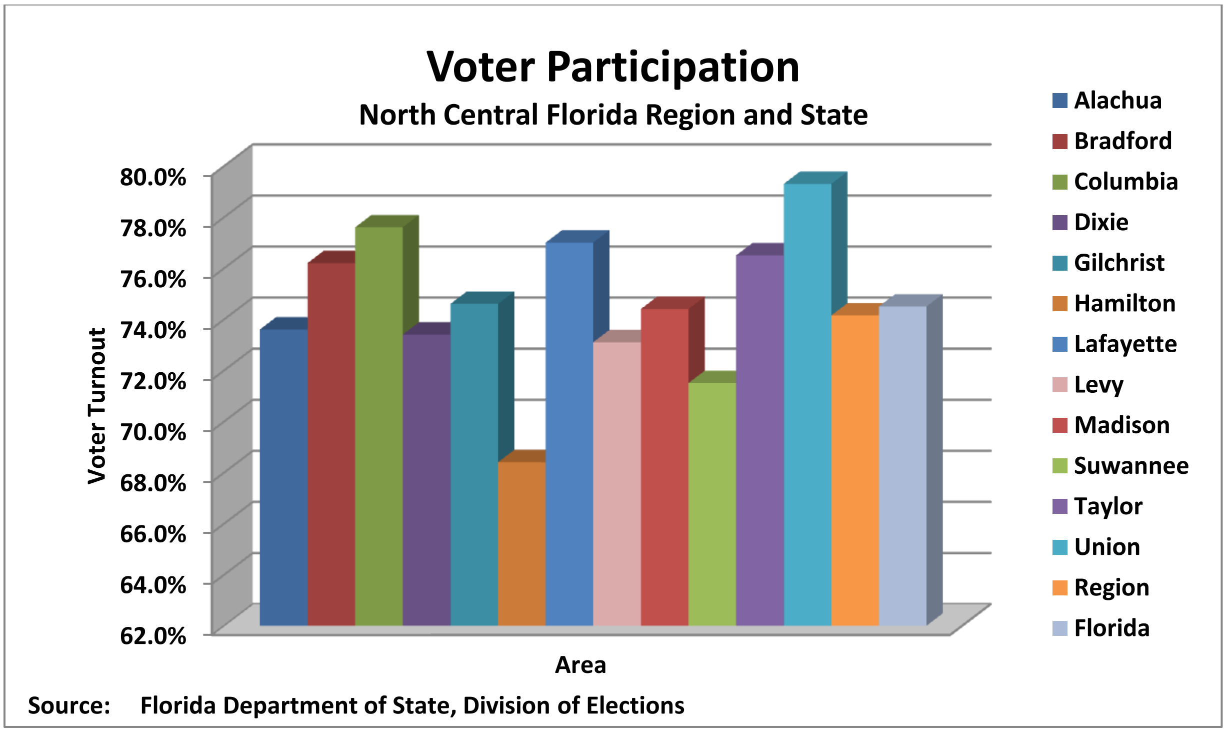
Source: The Urban Institute, National Center for Charitable Statistics

c. Voter Participation

Illustration C-15 shows that in the 2016, presidential biennial general election, voter participation across the region was similar to that of the state. Voter participation across the region varied from a high of 79.3 percent in Union County to a low of 68.4 percent in Hamilton County.

Illustration C-15

Voter Participation
North Central Florida Region and State
Biennial General Elections
2016



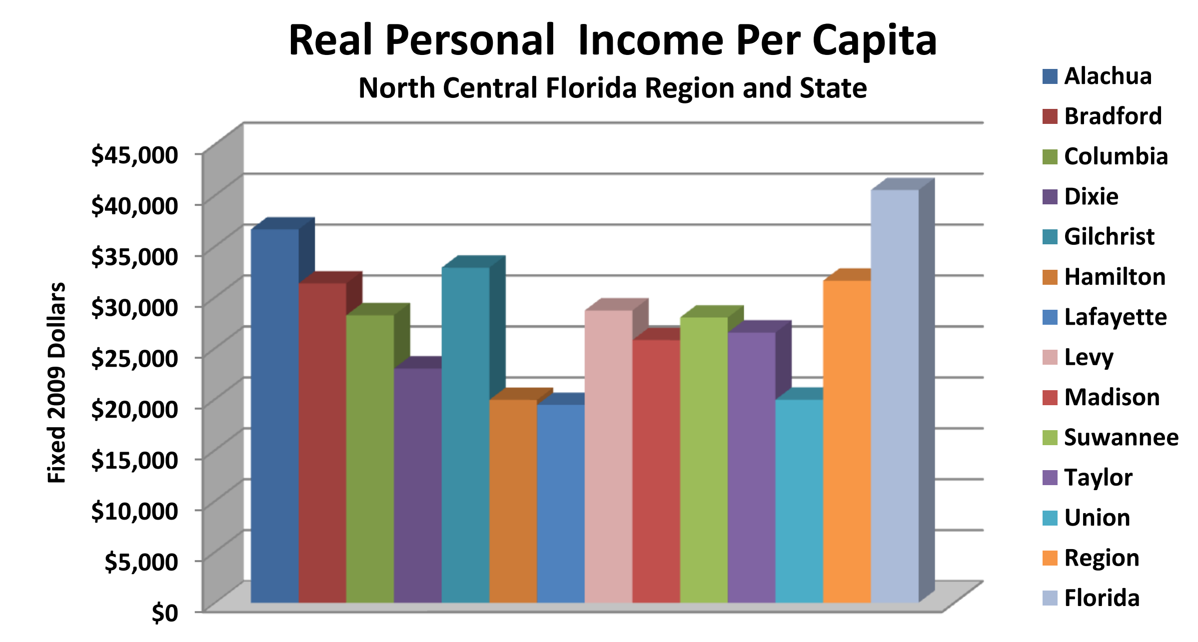
6. Quality of Life & Quality Places

a. Per Capita Income

Illustration C-16 shows that in 2015, 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 28 percent less than the state per capita income, Hamilton and Union Counties 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 2009 Dollars
2015



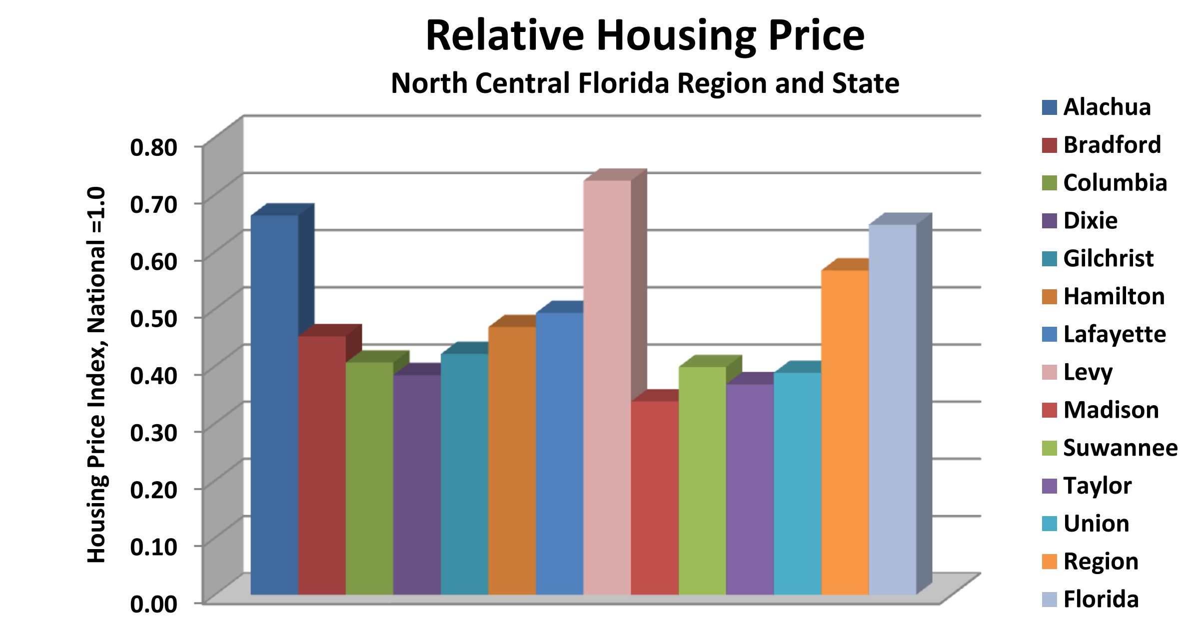
Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

b. House Purchase Price and Cost Index

Illustration C-17 shows that in 2015, housing in the region remained affordable relative to state and national averages. Only Levy 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
2015



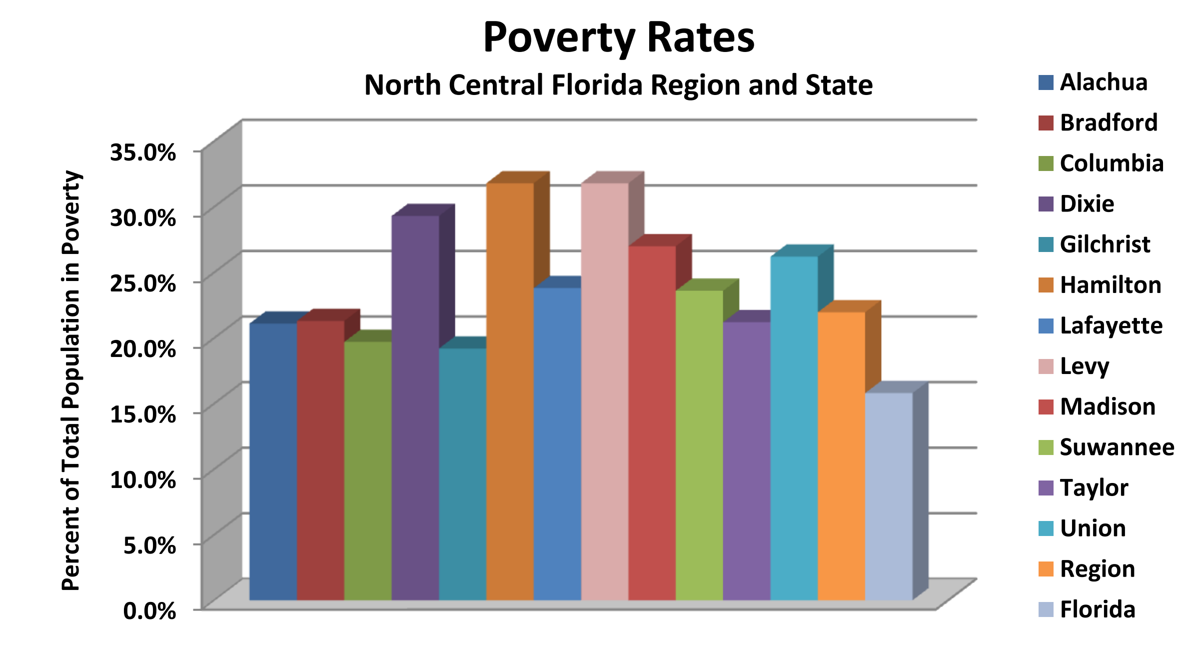
Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v1.7

c. Persons Living in Poverty

Illustration C-18 shows that in 2015, poverty rates across the region exceeded the state poverty rate. As a whole, the regional poverty rate exceeded the state rate by 39.2 percent, while Dixie County, with the highest poverty rate in the region at 29.3 percent, was nearly double the state rate of 15.8 percent.

Illustration C-18

Percent of Persons Living in Poverty
North Central Florida Region and State
2015



Source: U.S. Census Bureau, Small Area Income and Poverty Estimates

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 2018-2022 Comprehensive Economic Development Strategy are, as follows:

Lawrence Barrett, President, Florida Gateway College

Allen Cherry, Executive Director, Madison County Development Council

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

** Susan Davenport, President, Gainesville Council for Economic Outreach

Dennille Decker, Director, Columbia County/Lake City Chamber

Anna Farve, Executive Director, Career Source North Central Florida

Scott Fredrick, Director, Taylor County Development Authority

Diane Head, Executive Director, Career Source North Florida

Jeff Hendry, Executive Director, North Florida Economic Development Partnership

Glenn Hunter, Director, Columbia County Economic Development

Alvin Jackson, Director, Suwannee County Economic Development

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

John Pricher, Executive Director, Alachua County Tourist Development Council

* Susan Ramsey, Executive Director, Hamilton County Development Authority

Mike Williams, Owner, Mike Williams Insurance Agency

* Chair
** Vice-Chair

North Central Florida Regional Planning Council

Comprehensive Economic Development Strategy Team

Scott R. Koons, AICP, Executive Director

* Steven Dopp, Senior Planner

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

** Jean Strong, Executive Assistant to the Executive Director

** Tara Tucker, Secretary II

* Primary Responsibility
** Secondary Responsibility

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