

North Central Florida Comprehensive Economic Development Strategy

2023-2027



North Central Florida
Regional Planning Council - DRAFT

September 22, 2022

North Central Florida Comprehensive Economic Development Strategy

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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 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.

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



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; local governments and workforce. 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:

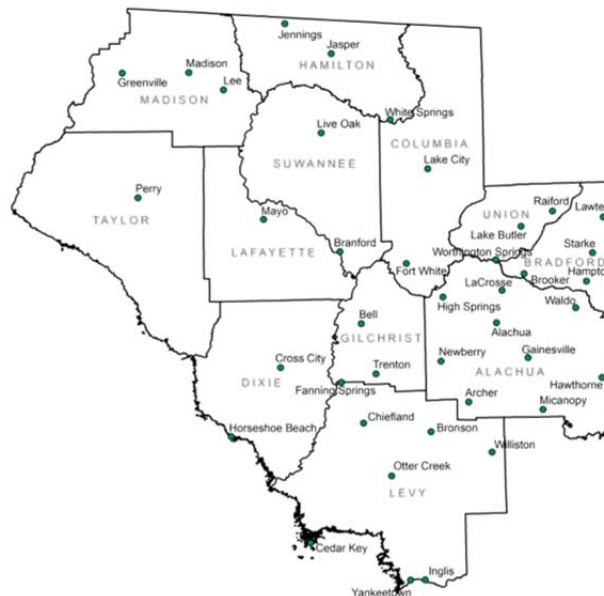
- An analysis of economic and community development problems and opportunities that incorporate relevant material from other government sponsored or supported plans;
- A background and history of the economic development situation of the region, with a discussion of the economy, including geography, 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 40 municipalities include (by County): Alachua - Alachua, Archer, Gainesville, Hawthorne, High Springs, LaCrosse, Micanopy, Newberry and Waldo; Bradford - Brooker, Hampton, Lawtey and Starke; Columbia



North Central Florida Counties and Municipalities

- Fort White and Lake City; Dixie - Cross City and Horseshoe Beach; Gilchrist - Bell, Fanning Springs and Trenton; Hamilton - Jasper, Jennings and White Springs; Lafayette - Mayo; Levy - Bronson, Cedar Key, Chiefland, Inglis, Otter Creek, Williston and Yankeetown; Madison - Greenville, Lee and Madison; Suwannee - Branford and Live Oak; Taylor - Perry; Union - Lake Butler, Raiford and Worthington Springs.

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 2020 U.S. Census enumerated population of just over 575,000. Over one-half of the population, just over 296,000, resides in the Gainesville Metropolitan Statistical Area, which consists of Alachua and Gilchrist Counties. Gainesville is home to the University of Florida, a land grant university, which is the primary economic driver of the region. Unlike many other regions of the state, north central Florida does not have beaches or theme parks, though it has a growing nature and eco-tourism base that takes advantage of the abundant presence of springs and rivers that flow through the region.



Suwannee River, Lafayette County

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

While largely rural, the region benefits from an extensive transportation network. Interstate 75 is the primary north/south transportation artery that connects the region to central and south Florida, as well as the Southeastern U.S. and Midwest U.S. to the north. Interstate 10 is the east/west transportation artery that connects the region to Jacksonville on the east and the Florida panhandle and Alabama to the west. Rail service in the region is provided by CSX

"The region benefits from an extensive transportation network."

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.

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 as a result of the COVID-19 pandemic, 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 the largest employment sector though a declining share of employment in the region. Health care is the second largest employment sector in the region, followed by retail trade.



Industrial Water Supply Facility, Suwannee County

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

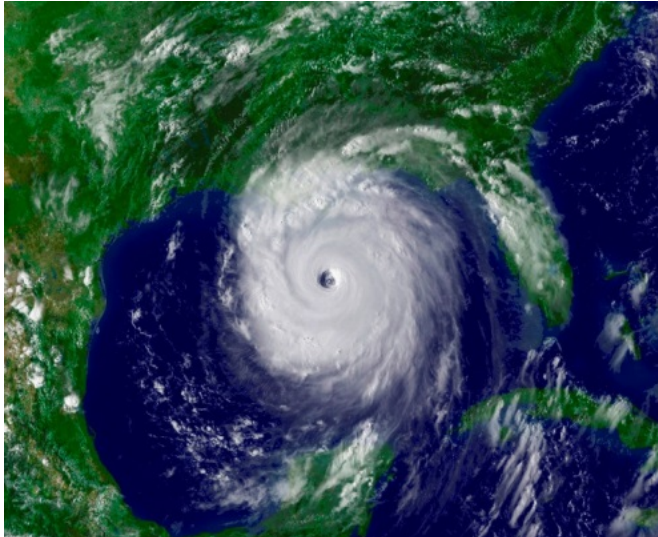
The region is rapidly becoming known as an innovation center due to the success of the UF Innovate Sid Martin Biotechnology Incubator in Alachua and the emergence of the UF Innovate Hub in Gainesville. A study by the Milken Institute identified the

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.



Center for Innovation and Economic Development, Gainesville



Hurricanes and Tropical Storms

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 a 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 human-made causes.

The economy of the region is vulnerable to both natural and human-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

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



Hazardous Materials Response 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 a regional emergency response plan 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.

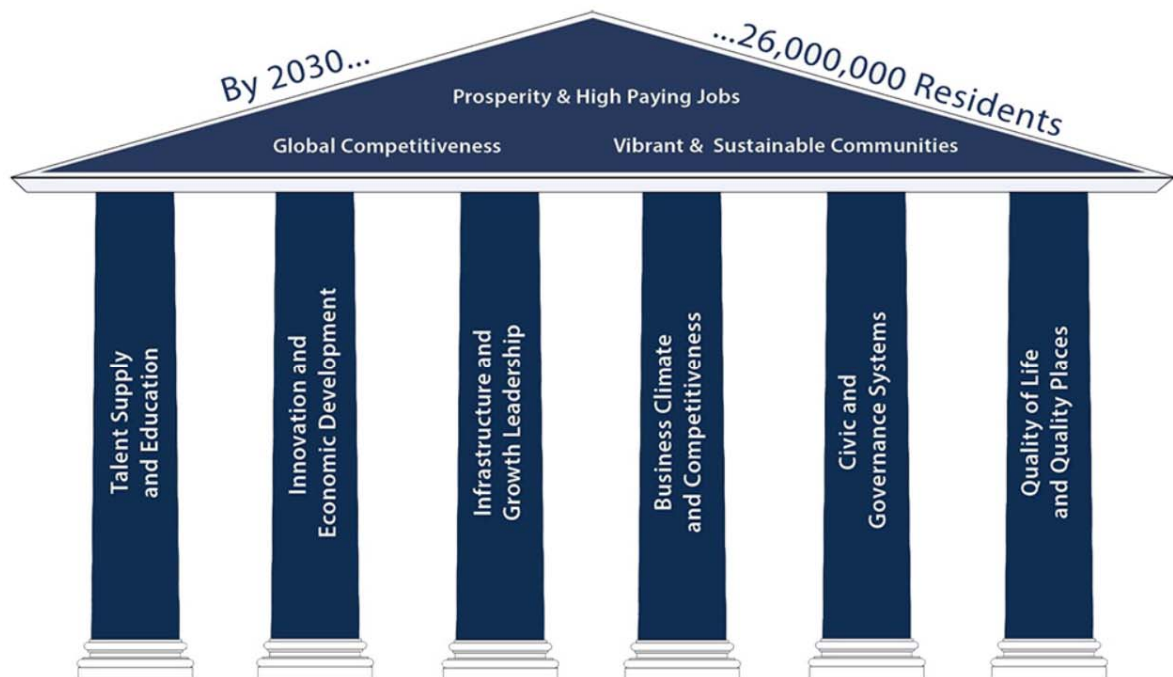
B. Goals and Objectives

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.

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					
<ul style="list-style-type: none"> 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					
<ul style="list-style-type: none"> 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 enhance 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					
<ul style="list-style-type: none"> 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.	3.c. 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.a. 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 College of Central Florida, Florida Gateway College, North Florida Community College, Santa Fe College, CareerSource Citrus Levy and Marion, 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.



University of Florida, Gainesville

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

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

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

2. Innovation & Economic Development

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

“Integrate research and commercialization to nurture innovation.”

Objective 3.1 - Support development of the Innovation Square research and development park through the integration of the University of Florida’s research enterprise and commercialization programs into the project through UF Innovate The Hub in Gainesville 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 UF Innovate 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.



**Cade Museum for
Creativity and Invention, Gainesville**

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.

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.



Depot Avenue Rail-Trail Bridge, Gainesville

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 Gateway 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.

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.



Power District Catalyst Building, Gainesville

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.

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.



Lafayette County Courthouse, Mayo

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.



Downtown Arts Festival, Gainesville

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.

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."



Downtown Redevelopment, Gainesville

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.

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.

E. Opportunity Zones

Inventory and Map of Opportunity Zones

Opportunity Zones, created under the 2017 Tax Cuts and Jobs Act, are a federal economic development tool focused on improving the outcomes of communities across the country, especially in areas that have suffered from disinvestment over many years. Opportunity Zones are designated low-income census tracts where tax incentives are available to groups or individuals who invest in an Opportunity Fund (i.e., an investment vehicle for injecting money in an Opportunity Zone) and hold their capital gains in Opportunity Zone-related assets or property. By investing in Opportunity Zones, investors stand to gain a temporary deferral on their capital gains taxes if they hold their investments for at least five years and a permanent exclusion from a tax on capital gains from the Opportunity Zones investments if the investments are held for ten years.

“Opportunity Zones are low-income census tracts where tax incentives are available to investors.”

There are 23 Opportunity Zones in the North Central Florida Economic Development District. The Opportunity Zones include eight Opportunity Zones in Alachua County; two Opportunity Zones each in Gilchrist County, Hamilton County, Levy County and Suwannee County; and one Opportunity Zone each in Bradford County, Columbia County, Dixie County, Lafayette County, Madison County, Taylor County and Union County (see Illustration E-1).



Midtown Redevelopment, Gainesville

Key Partners and Collaborations

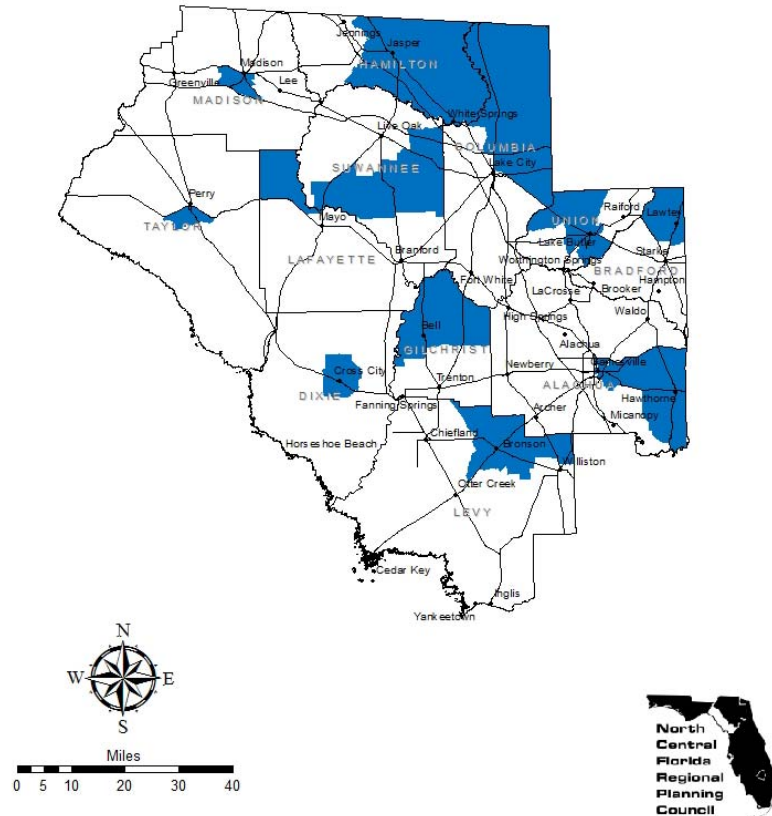
The key regional partners collaborating to enhance investment in Opportunity Zones include economic development organizations and institutions of higher learning. In particular, the economic development organizations include the North Florida Economic Development Partnership, Inc., a 14-county not-for-profit corporation focused on advancing job creation opportunities throughout the 11 rural counties of the region and three adjacent rural counties; and the 12-county economic development

organizations in the region recognized by Enterprise Florida, Inc. The institutions of higher learning include the University of Florida, College of Central Florida, Gateway College, North Florida College and Santa Fe College.

Linkages to Data, Goals and Objectives, and Priority Projects

The north central Florida Opportunity Zones cover 1,844 square miles. According to the United States Census, American Community Survey 2014-2018, the north central Florida Opportunity Zones have a population of 124,268 persons and a labor force of 45,348 workers. Investment in the Opportunity Zones will advance the Innovation and Economic Development Goals and Objectives of the Strategy. In addition, such investments will also advance the Vital Project Areas of the Strategy to support the development of the

North Central Florida Opportunity Zones



catalyst sites for the North Central Florida Rural Area of Opportunity and support the development and expansion of regional business incubators and research parks.

F. Economic Recovery

Economic recovery is the process of adaptation and adjustment in response to a disruption or shock to the economy, for a swift return to economic equilibrium. Economic recovery planning focuses on economic development planning or implementation projects that build economic resilience to and long-term recovery from economic shocks. For a prosperous regional economy to thrive, businesses must be prepared for and adapt to any disruptions to operations that may occur. Regional economic recovery means attracting new businesses and industries to the region to promote a sustainable economy while supporting the expansion of existing businesses and creation of new businesses, developing a skilled workforce, and integrating data into the decision-making process.

“For a prosperous regional economy to thrive, businesses must be prepared for and adapt to any disruptions to operations that may occur.”

Recovery Challenges

Recovery challenges in the region include:



Innovation District, Gainesville

Workforce limitations such as lower wages and lack of training and child-care facilities;

Inadequate supply of affordable housing;

Limited access to routine medical care;

Inadequate broadband connectivity;

Governmental agencies with unconnected support systems; and

Lack of industry diversity.

Recovery Strategies

- **Restore Tourism Industry** - Communicate the importance of the tourism industry, and the role of the industry's success to lawmakers and communities; advocate for the swift return of business to the region in order to maximize potential economic impact. Work to attract tourists. Support and collaborate with communities and entities to offer new programs and products catering to travelers.



Blue Springs, Gilchrist County

- **Enhance Health Care System** - There are vulnerabilities within the health care system that disruptions to the economy highlight. Ensure that the regional population has access to health care, health care insurance, and has the community support to make healthy choices.
- **Keep Residents in their Homes** - Support emergency rental assistance and the organizations that distribute funding. Explore creative options to reduce mortgage payments for those unable to make payments during an emergency, while also supporting landlords. Support housing disaster assistance.



Regional Transit System, Gainesville

- **Enhance Childcare Services** - A fully functional childcare system is essential to maintain a resilient workforce. Work to maintain childcare infrastructure.

- **Revitalize Transportation Services** - Support transportation providers in re-building service and routes. Ensure transportation providers operate safely.

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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.”



University of Florida, Gainesville

The region is facing 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 2020, Alachua County, which as the largest economy of any county in the region and with average annual wages over \$53,300, is more than \$2,000 lower than state averages. In 2020, Madison County, with the lowest average annual wages in the region at just over \$35,100, has a nearly \$21,000 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.

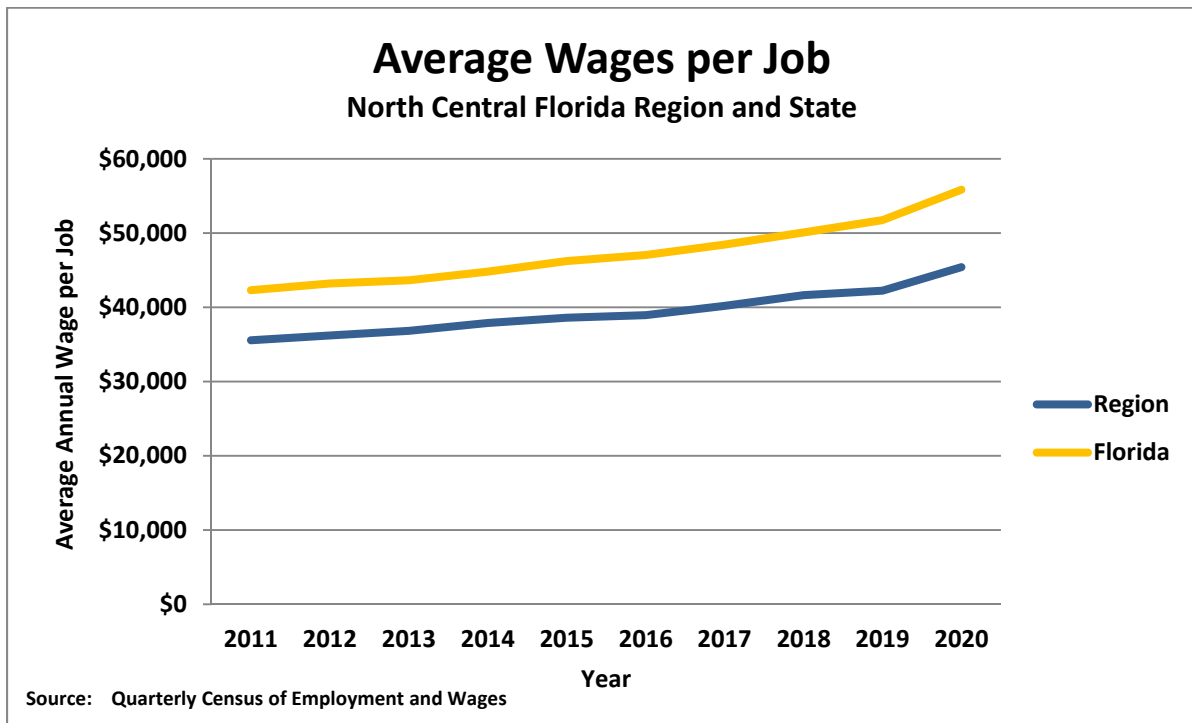
Table A-1
Average Wages per Job
North Central Florida Region and State
2011 to 2020

Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	\$40,207	\$40,773	\$41,589	\$42,701	\$43,597	\$44,425	\$45,704	\$47,857	\$49,104	\$53,346
Bradford	\$30,831	\$31,467	\$32,678	\$34,198	\$35,783	\$35,692	\$35,630	\$37,468	\$37,634	\$39,756
Columbia	\$33,275	\$33,535	\$34,054	\$34,897	\$35,620	\$35,931	\$37,443	\$38,204	\$39,137	\$41,092
Dixie	\$28,641	\$29,191	\$29,422	\$32,077	\$32,110	\$33,367	\$34,590	\$35,228	\$34,574	\$36,276
Gilchrist	\$29,737	\$30,018	\$31,090	\$31,880	\$32,263	\$33,264	\$33,378	\$33,200	\$34,778	\$41,775
Hamilton	\$39,119	\$40,287	\$40,587	\$41,824	\$39,651	\$38,215	\$42,886	\$45,410	\$44,614	\$50,864
Lafayette	\$27,687	\$28,781	\$28,856	\$29,648	\$29,543	\$31,049	\$31,804	\$33,359	\$33,309	\$35,971
Levy	\$27,892	\$28,491	\$28,878	\$29,233	\$30,116	\$30,912	\$31,512	\$32,670	\$33,646	\$35,554
Madison	\$29,237	\$29,605	\$29,841	\$31,476	\$32,053	\$31,774	\$32,067	\$32,979	\$33,283	\$35,184
Suwannee	\$28,245	\$28,871	\$29,720	\$30,421	\$31,341	\$32,359	\$33,592	\$34,894	\$35,802	\$37,734
Taylor	\$36,470	\$36,491	\$37,593	\$37,217	\$40,717	\$38,014	\$39,208	\$40,110	\$40,749	\$41,752
Union	\$33,075	\$33,744	\$34,060	\$34,270	\$34,306	\$35,374	\$36,174	\$38,167	\$38,684	\$39,846
Region	\$35,561	\$36,206	\$36,835	\$37,888	\$38,612	\$38,953	\$40,203	\$41,637	\$42,255	\$45,416
Florida	\$42,312	\$43,213	\$43,651	\$44,810	\$46,240	\$47,055	\$48,452	\$50,092	\$51,744	\$55,840

Source: Florida Department of Economic Opportunity, Quarterly Census of Employment and Wages, 2011 - 2020 Annual Files
<<http://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
2011 to 2020



b. High School Graduation Rates

As shown in Table A-2 and Illustration A-2, the regional High School Graduation rate has consistently increased since 2014-15. In 2020, six of the 12 counties in the region exceeded the overall state rate and six counties fell below the state rate. Illustration A-2 demonstrates the regional graduation rates have exceeded state rates since 2017-18, the overall trend line for the region is positive as well, improving from 80.8 percent in the 2010-11 school year to 90.7 percent in 2019-20.

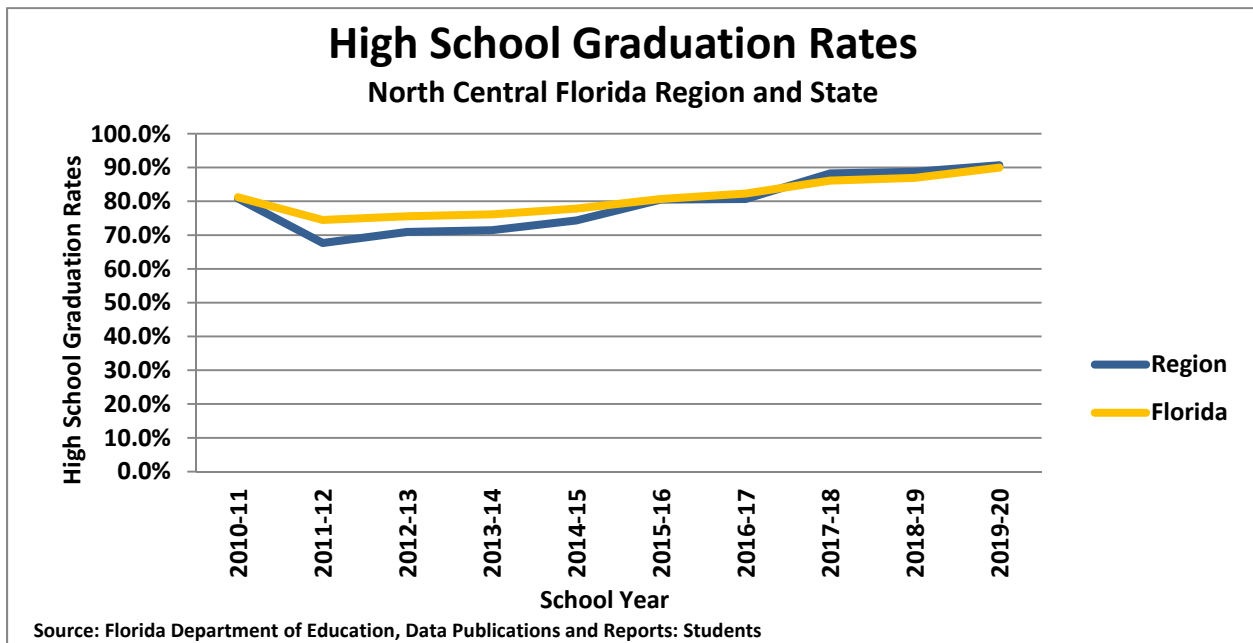
Table A-2
High School Graduation Rates
North Central Florida Region and State
School Years 2010-11 to 2019-20

Area	School Year									
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Alachua	78.1%	68.7%	72.6%	72.2%	74.3%	78.4%	82.7%	88.0%	88.5%	90.4%
Bradford	73.3%	64.2%	67.5%	71.3%	76.9%	83.7%	78.9%	89.0%	87.7%	88.2%
Columbia	87.2%	64.8%	65.7%	61.0%	71.0%	75.0%	70.7%	88.4%	92.4%	95.4%
Dixie	78.2%	77.1%	82.4%	87.8%	96.9%	96.1%	89.5%	96.9%	90.6%	89.8%
Gilchrist	67.6%	85.9%	89.7%	95.4%	94.0%	97.7%	93.4%	87.3%	89.4%	90.1%
Hamilton	95.8%	55.0%	55.5%	78.6%	73.7%	83.0%	67.0%	73.5%	73.1%	87.0%
Lafayette	58.0%	65.8%	87.5%	80.0%	87.0%	93.2%	88.2%	97.4%	98.8%	97.7%
Levy	85.8%	72.2%	77.8%	69.1%	81.6%	81.4%	79.7%	87.0%	88.1%	89.6%
Madison	84.0%	66.3%	64.0%	75.7%	58.1%	80.1%	76.7%	81.3%	82.5%	87.2%
Suwannee	68.5%	59.5%	59.5%	76.6%	67.5%	89.6%	90.5%	96.2%	93.7%	91.3%
Taylor	77.8%	63.5%	62.4%	49.5%	64.7%	70.7%	70.3%	87.7%	83.9%	92.8%
Union	93.2%	70.4%	79.0%	82.8%	77.7%	72.4%	81.0%	84.1%	84.4%	79.6%
Region	80.8%	67.7%	70.9%	71.5%	74.3%	80.5%	80.7%	88.3%	88.7%	90.7%
Florida	81.2%	74.5%	75.6%	76.1%	77.9%	80.7%	82.3%	86.1%	86.9%	90.0%

Source: Florida Department of Education, Data Publications and Reports: Students
<https://edudata.fldoe.org/AdvancedReports.html>

Illustration A-2

High School Graduation Rates
North Central Florida Region and State
School Years 2010-11 to 2019-20



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 and Florida Standards Assessments in the region has declined over the 2011 to 2020 time frame, and has been mostly below the state performance levels for the period. In 2020, three school districts, Gilchrist, Lafayette 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/
Florida Standards Assessments
North Central Florida Region and State
2011 to 2020

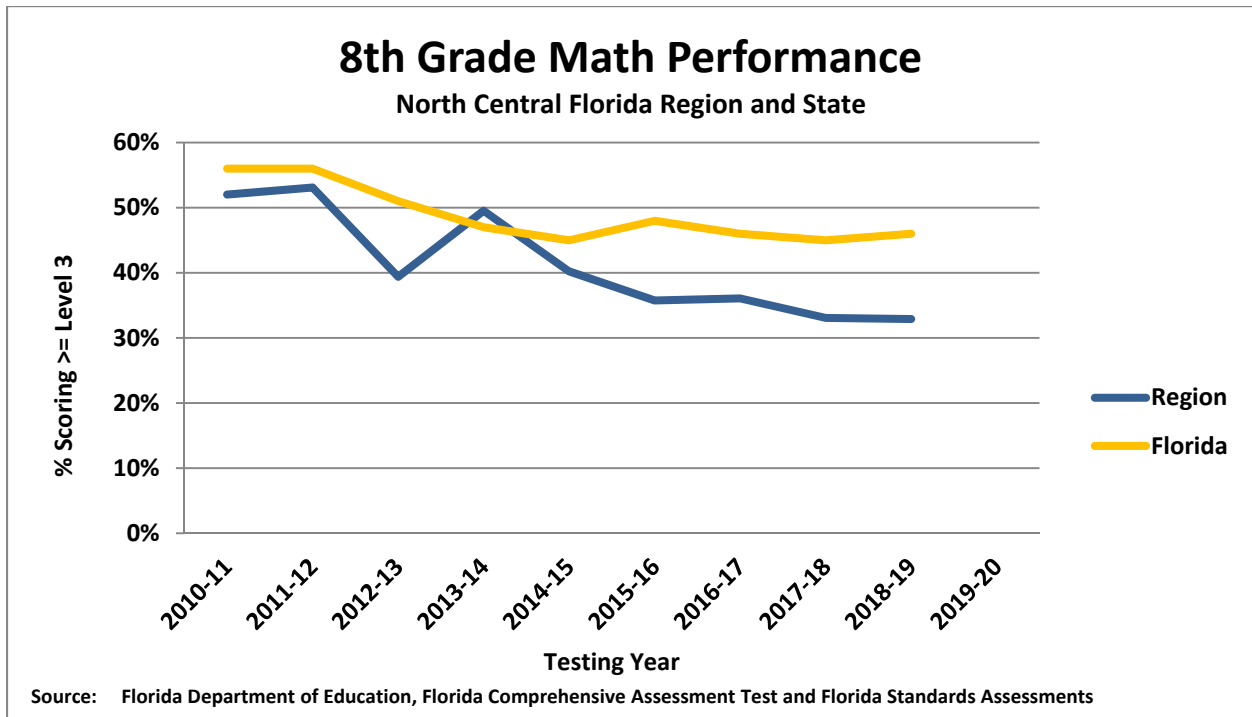
Area	School Year									
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Alachua	59%	56%	39%	56%	40%	33%	33%	24%	27%	
Bradford	40%	45%	11%	50%	10%	20%	24%	23%	25%	
Columbia	45%	48%	31%	43%	48%	39%	41%	37%	36%	
Dixie	50%	65%	45%	53%	50%	48%	53%	28%	27%	
Gilchrist	70%	68%	60%	55%	61%	47%	55%	55%	60%	
Hamilton	31%	21%	29%	23%	11%	16%	26%	33%	35%	
Lafayette	45%	55%	75%	34%	21%	39%	24%	62%	47%	
Levy	63%	58%	44%	38%	44%	46%	35%	38%	29%	
Madison	23%	38%	17%	16%	11%	29%	16%	38%	27%	
Suwannee	41%	45%	44%	49%	31%	24%	35%	19%	30%	
Taylor	50%	61%	54%	58%	50%	32%	33%	41%	17%	
Union	52%	60%	57%	49%	65%	66%	68%	76%	75%	
Region	52%	53%	39%	50%	40%	36%	36%	33%	33%	
Florida	56%	56%	51%	47%	45%	48%	46%	45%	46%	

Source: Florida Department of Education, Florida Comprehensive Assessment Test and Florida Standards Assessments
<https://edudata.fldoe.org/AdvancedReports.html>

Note: The Florida Comprehensive Assessment Test was replaced with the Florida Standards Assessments in 2014-15. Due to the COVID-19 pandemic, the Florida Standards Assessments were not administered in 2019-20.

Illustration A-3

Eighth Grade Math Performance
Percent of Students Scoring at or Above Level 3 of 5 on
Florida Comprehensive Assessment Test/
Florida Standards Assessments
North Central Florida Region and State
2011 to 2020



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2. Innovation & Economic Development

Innovation & Economic Development:
**“Innovation and economic development will be
paramount to secure economic prosperity.”**



**Cade Museum for
Creativity and Invention, Gainesville**

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.

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

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. Three of the 12 counties in the region experienced declines in Gross Domestic Product between 2011 and 2020. As demonstrated in Illustration A-4, the region experienced growth in its Gross Domestic Product between 2011 and 2020.

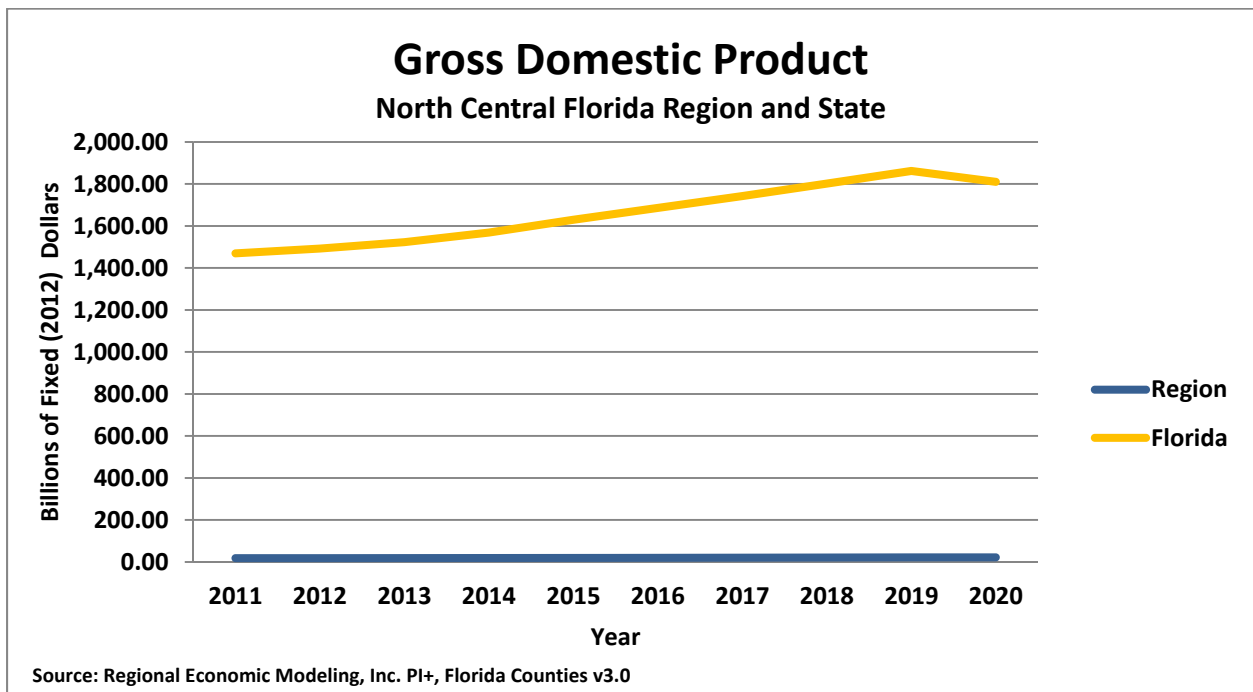
Table A-4
Gross Domestic Product
North Central Florida Region and State
Billions of Fixed 2012 Dollars
2011 to 2020

Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	11.31	11.25	11.52	11.75	11.94	12.21	12.79	13.29	13.73	13.85
Bradford	0.64	0.61	0.59	0.61	0.62	0.59	0.63	0.64	0.59	0.60
Columbia	1.84	1.90	1.87	2.00	2.08	2.18	2.28	2.42	2.47	2.45
Dixie	0.27	0.26	0.27	0.27	0.26	0.26	0.27	0.19	0.26	0.19
Gilchrist	0.30	0.31	0.30	0.39	0.37	0.37	0.35	0.36	0.38	0.46
Hamilton	0.43	0.41	0.37	0.32	0.47	0.40	0.49	0.52	0.54	0.55
Lafayette	0.11	0.13	0.13	0.11	0.11	0.11	0.10	0.10	0.12	0.10
Levy	0.72	0.75	0.75	0.80	0.85	0.92	0.98	0.97	1.03	0.97
Madison	0.38	0.41	0.42	0.46	0.46	0.41	0.42	0.45	0.43	0.45
Suwannee	1.25	1.28	1.13	1.25	1.36	1.27	1.30	1.38	1.24	1.25
Taylor	0.69	0.71	0.77	0.73	0.88	0.78	0.73	0.73	0.70	0.69
Union	0.29	0.29	0.27	0.28	0.28	0.29	0.29	0.28	0.28	0.31
Region	18.23	18.31	18.39	18.98	19.66	19.77	20.62	21.33	21.77	21.86
Florida	1,469.41	1,492.25	1,522.68	1,568.71	1,629.34	1,686.14	1,742.34	1,801.63	1,861.87	1,810.37

Source: Regional Economic Modeling, Inc. PI+, Florida Counties v3.0

Illustration A-4

Gross Domestic Product
North Central Florida Region and State
Billions of Fixed 2009 Dollars
2011 to 2020



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 from Fiscal Year 2010-11 to Fiscal Year 2018-19 period, with a decline in Fiscal Year 2019-20, due primarily to the economic downturn as a result of the COVID-19 pandemic. 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
2010-11 to 2019-20

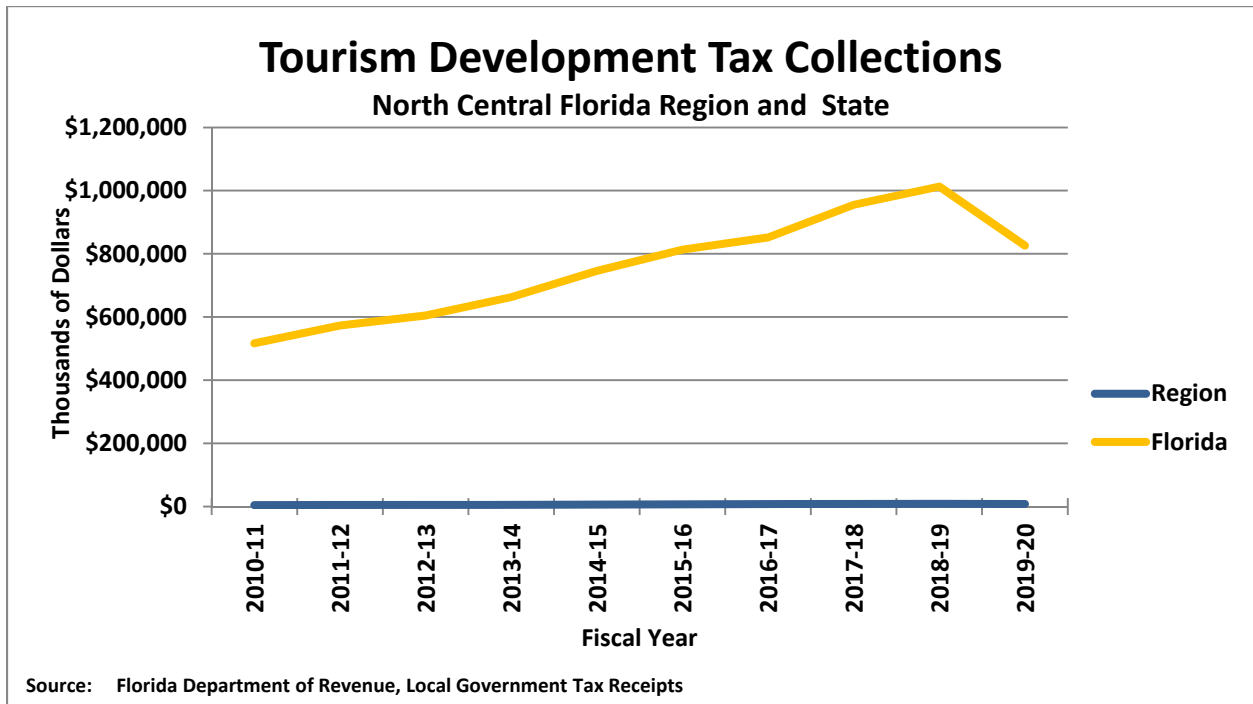
Area	Fiscal Year									
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Alachua	\$3,338	\$3,488	\$3,542	\$3,904	\$4,226	\$4,783	\$4,794	\$5,435	\$5,638	\$4,990
Bradford	\$82	\$85	\$82	\$89	\$100	\$116	\$143	\$172	\$150	\$127
Columbia	\$586	\$627	\$668	\$916	\$987	\$1,279	\$1,523	\$1,558	\$1,517	\$1,377
Dixie	\$7	\$26	\$23	\$24	\$30	\$38	\$45	\$64	\$83	\$91
Gilchrist	\$30	\$28	\$24	\$29	\$40	\$41	\$52	\$50	\$59	\$72
Hamilton	\$31	\$30	\$28	\$30	\$30	\$28	\$31	\$31	\$38	\$32
Lafayette	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Levy	\$152	\$157	\$164	\$169	\$189	\$212	\$213	\$220	\$246	\$323
Madison	\$84	\$85	\$86	\$102	\$115	\$103	\$125	\$124	\$142	\$122
Suwannee	\$110	\$167	\$162	\$193	\$219	\$239	\$278	\$282	\$297	\$230
Taylor	\$220	\$196	\$205	\$231	\$229	\$235	\$341	\$499	\$539	\$552
Union	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Region	\$4,641	\$4,887	\$4,984	\$5,690	\$6,166	\$7,073	\$7,546	\$8,434	\$8,707	\$7,917
Florida	\$516,632	\$572,967	\$604,643	\$662,750	\$746,014	\$813,113	\$851,682	\$954,938	\$1,012,654	\$825,874

Source: Florida Department of Revenue website, Local Government Tax Receipts by County,
<http://dor.myflorida.com/dor/taxes/colls_from_7_2020.html>

Note: Values presented in thousands of dollars.

Illustration A-5

Tourism Development Tax Collections
North Central Florida Region and State
Thousands of Dollars
2010-11 to 2019-20



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 2011, the region imported approximately 95.8 percent more goods and services than it exported, while in 2020, the ratio of exports to imports decreased to 75.2 percent, as opposed to the state ratios of 42.2 percent in 2011 and 45.9 percent in 2020. The decrease in the export to import ratio demonstrates a significant capital gain for the region.

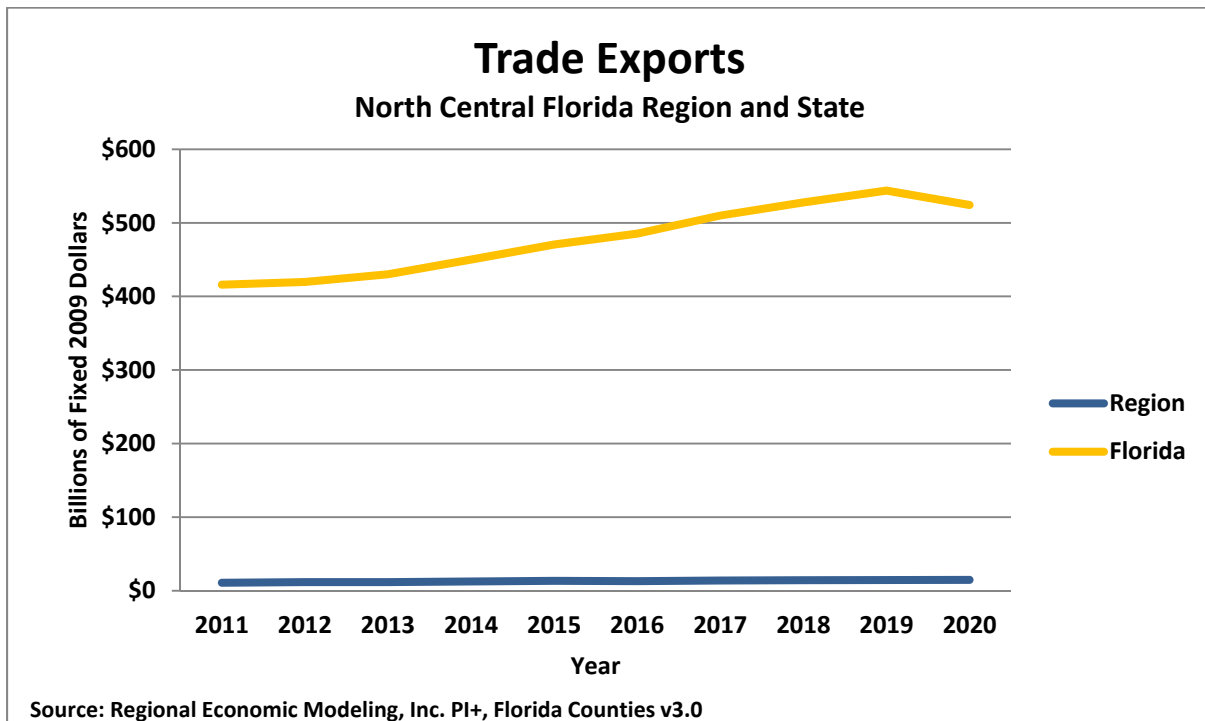
Table A-6a
Trade Exports
North Central Florida Region and State
Billions of Fixed 2012 Dollars
2011 to 2020

Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	5.30	5.52	5.72	5.81	5.92	5.90	6.38	6.48	6.87	7.03
Bradford	0.43	0.44	0.41	0.45	0.48	0.41	0.45	0.46	0.39	0.40
Columbia	1.11	1.26	1.23	1.43	1.50	1.66	1.85	2.02	2.04	1.99
Dixie	0.23	0.22	0.23	0.25	0.21	0.18	0.19	0.14	0.19	0.15
Gilchrist	0.20	0.23	0.24	0.41	0.37	0.36	0.32	0.33	0.36	0.50
Hamilton	0.62	0.62	0.61	0.48	0.72	0.67	0.80	0.86	0.90	0.93
Lafayette	0.09	0.16	0.16	0.10	0.10	0.10	0.09	0.09	0.09	0.09
Levy	0.46	0.56	0.56	0.69	0.74	0.83	0.91	0.86	0.98	0.88
Madison	0.32	0.38	0.38	0.44	0.45	0.38	0.39	0.43	0.41	0.45
Suwannee	1.18	1.31	0.96	1.30	1.52	1.33	1.41	1.50	1.27	1.31
Taylor	0.80	0.85	0.98	0.95	1.21	1.05	0.95	0.91	0.86	0.89
Union	0.15	0.16	0.14	0.14	0.15	0.16	0.17	0.16	0.15	0.19
Region	\$10.88	\$11.70	\$11.63	\$12.45	\$13.37	\$13.04	\$13.91	\$14.24	\$14.50	\$14.81
Florida	\$416.00	\$419.61	\$430.08	\$450.04	\$470.49	\$485.41	\$509.92	\$527.81	\$543.95	\$524.23

Source: Regional Economic Modeling, Inc. PI+, Florida Counties v3.0

Illustration A-6a

Trade Exports
North Central Florida Region and State
Billions of Fixed 2012 Dollars
2011 to 2020



As shown in Table A-6b and Illustration A-6b, from 2011 to 2020 the value of Trade Imports in the region increased by \$4.65 billion. Increasing Trade Imports coupled with increased Trade Exports is a sign of positive economic activity in the region. Illustration A-6b demonstrates the increase in imported goods and services between 2011 and 2019. In 2020, Trade Imports declined as a result of the economic downturn caused by the COVID-19 pandemic.

Table A-6b

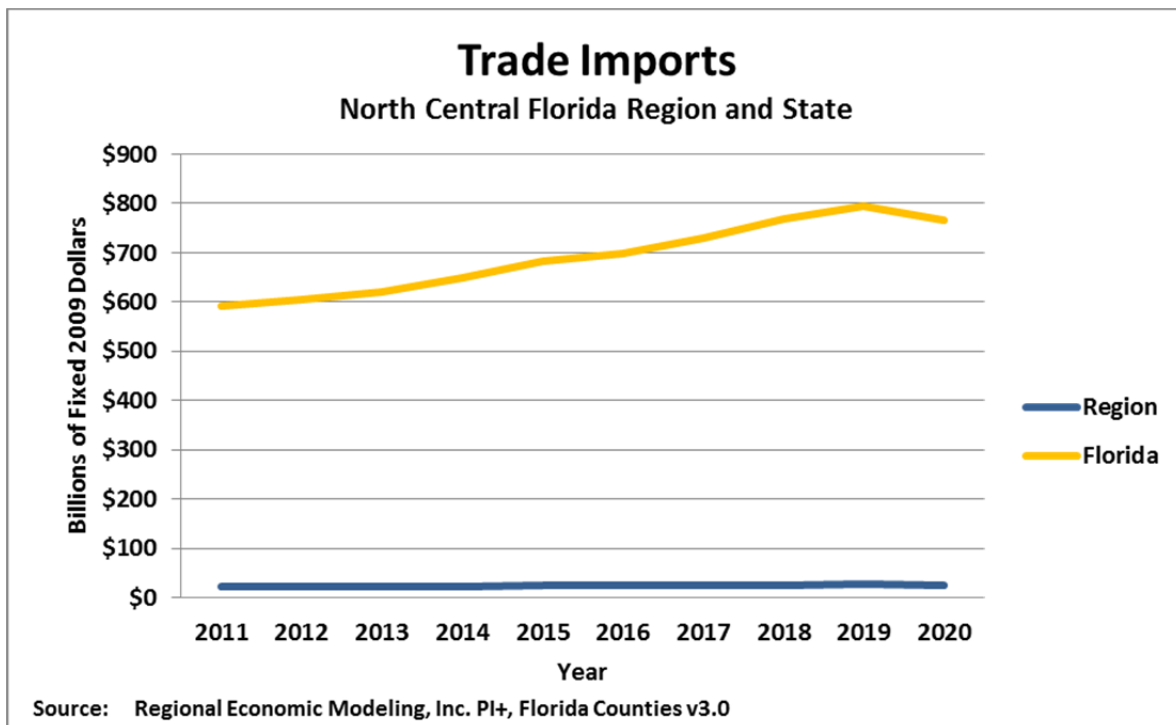
**Trade Imports
North Central Florida Region and State
Billions of Fixed 2012 Dollars
2011 to 2020**

	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	\$8.39	\$8.67	\$8.93	\$9.17	\$9.63	\$9.89	\$10.17	\$10.32	\$10.79	\$10.29
Bradford	\$1.08	\$1.07	\$1.10	\$1.10	\$1.16	\$1.14	\$1.23	\$1.29	\$1.28	\$1.35
Columbia	\$2.43	\$2.57	\$2.63	\$2.71	\$2.84	\$2.87	\$3.02	\$3.19	\$3.30	\$3.12
Dixie	\$0.71	\$0.70	\$0.72	\$0.73	\$0.74	\$0.75	\$0.78	\$0.93	\$0.88	\$0.99
Gilchrist	\$0.79	\$0.79	\$0.83	\$0.91	\$0.90	\$0.90	\$0.93	\$0.95	\$0.99	\$1.02
Hamilton	\$0.76	\$0.75	\$0.81	\$0.75	\$0.82	\$0.84	\$0.87	\$0.90	\$0.92	\$0.93
Lafayette	\$0.69	\$0.77	\$0.85	\$0.67	\$0.85	\$0.78	\$0.83	\$0.91	\$0.72	\$0.83
Levy	\$1.61	\$1.64	\$1.69	\$1.78	\$1.83	\$1.87	\$1.90	\$1.90	\$2.01	\$1.99
Madison	\$0.90	\$0.89	\$0.88	\$0.91	\$0.94	\$0.93	\$1.14	\$1.20	\$1.25	\$1.20
Suwannee	\$1.81	\$1.92	\$1.78	\$2.01	\$2.21	\$2.05	\$2.12	\$2.16	\$2.10	\$2.11
Taylor	\$1.01	\$1.02	\$1.09	\$1.08	\$1.20	\$1.12	\$1.13	\$1.12	\$1.26	\$1.10
Union	\$1.12	\$1.14	\$1.16	\$1.09	\$1.09	\$1.05	\$1.07	\$1.07	\$1.10	\$1.03
Region	\$21.30	\$21.91	\$22.47	\$22.91	\$24.19	\$24.20	\$25.17	\$25.96	\$26.58	\$25.95
Florida	\$591.70	\$604.54	\$618.99	\$649.27	\$682.63	\$699.33	\$730.32	\$768.74	\$794.39	\$765.01

Source: Regional Economic Modeling, Inc. PI+, Florida Counties v3.0

Illustration A-6b

Trade Imports
North Central Florida Region and State
Billions of Fixed 2009 Dollars
2011 to 2020



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3. Infrastructure & Growth Leadership

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



Depot Avenue Rail-Trail Bridge, Gainesville

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 4.7 percent between 2015 and 2020 as compared with an increase of 7.8 percent for the state. The population of the region is expected to increase by 16.6 percent between 2020 and 2050, while the population of the state is projected to increase by 29.4 percent over the same period.

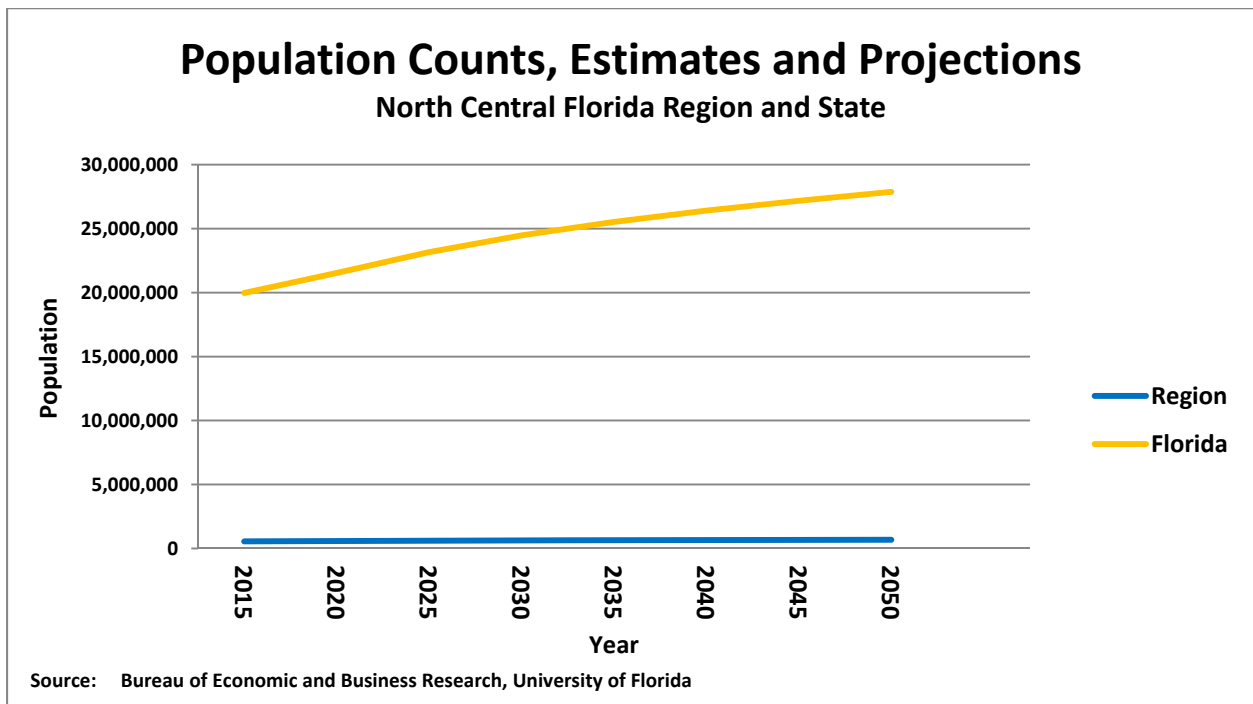
Table A-7
Population Counts, Estimates and Projections
North Central Florida Region and State
2015 to 2050

	Estimate	Census	Projections					
	2015	2020	2025	2030	2035	2040	2045	2050
Alachua	254,893	278,468	297,600	310,600	320,900	328,800	335,600	341,800
Bradford	27,310	28,303	28,400	28,800	29,000	29,100	29,300	29,400
Columbia	68,163	69,698	72,500	74,700	76,200	77,500	78,600	79,600
Dixie	16,468	16,759	17,100	17,400	17,600	17,700	17,900	18,000
Gilchrist	16,839	17,864	19,000	19,800	20,400	20,900	21,300	21,700
Hamilton	14,630	14,004	13,700	13,800	13,900	14,000	14,000	14,100
Lafayette	8,664	8,226	8,200	8,400	8,500	8,600	8,700	8,700
Levy	40,448	42,915	45,300	47,000	48,200	49,400	50,400	51,300
Madison	19,200	17,968	18,300	18,400	18,500	18,600	18,600	18,600
Suwannee	44,452	43,474	45,000	46,100	46,900	47,500	47,900	48,300
Taylor	22,824	21,796	21,200	21,400	21,500	21,500	21,600	21,700
Union	15,918	16,147	16,200	16,600	17,000	17,200	17,500	17,700
Region	549,809	575,622	602,500	623,000	638,600	650,800	661,400	670,900
Florida	19,974,400	21,538,187	23,164,000	24,471,100	25,520,800	26,405,500	27,176,700	27,877,700

Source: Florida Estimates of Population, Table 5, and Projections of Florida Population by County, 2025 - 2050, with Estimates for 2021, Bureau of Economic and Business Research, 2022.

Illustration A-7

Population Counts, Estimates and Projections
North Central Florida Region and State
2015 to 2050



b. Annual Building Permits

As shown in Table A-8 and Illustration A-8, the region, similar to the state, has experienced significant increases in new residential construction since 2011. However, in 2020, the region experienced a decline in new residential construction due to the economic downturn caused by the COVID-19 pandemic.

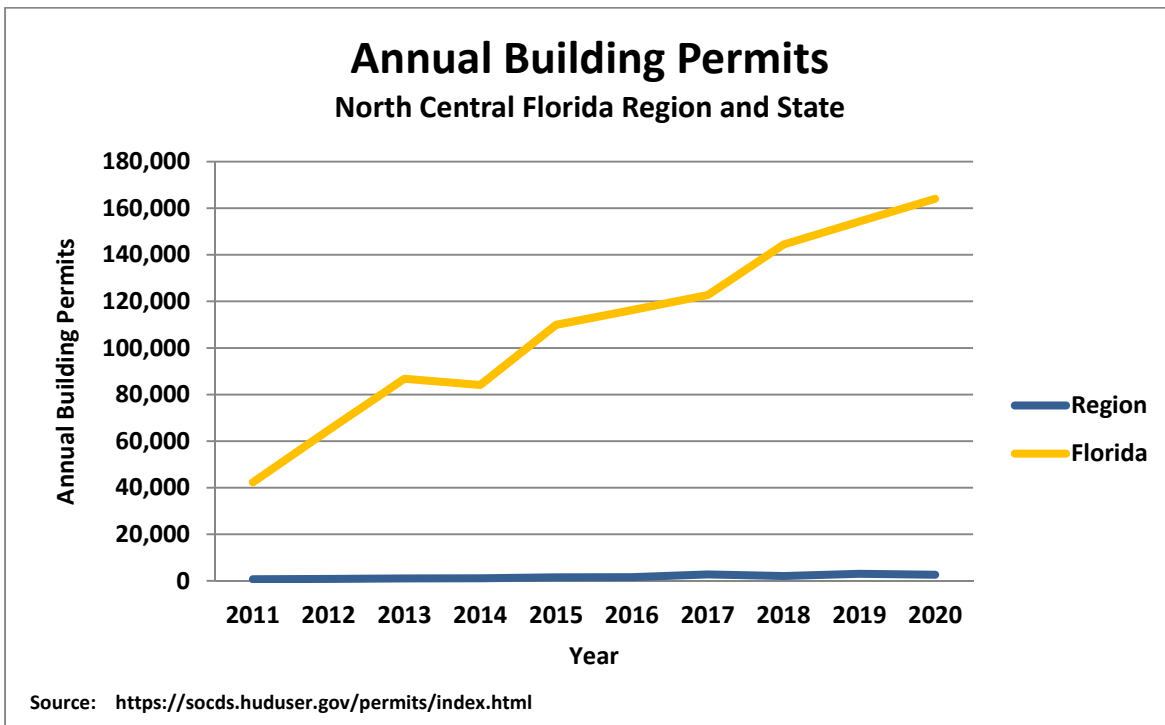
Table A-8
Annual Building Permits
North Central Florida Region and State
Residential Units
2011 to 2020

Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	444	589	770	762	1,171	1,060	2,211	1,504	2,320	1,767
Bradford	18	23	27	2	0	30	4	5	62	74
Columbia	52	47	65	80	80	104	146	147	161	194
Dixie	17	20	24	24	26	30	31	33	35	43
Gilchrist	20	35	30	37	43	50	58	65	66	83
Hamilton	15	12	9	9	22	0	10	0	16	22
Lafayette	4	14	4	11	10	7	7	14	9	34
Levy	54	50	57	49	49	143	159	176	181	230
Madison	27	28	34	33	35	30	33	37	39	43
Suwannee	28	25	28	41	40	71	49	63	64	75
Taylor	21	21	18	24	41	49	38	30	43	29
Union	9	13	15	22	23	27	29	32	35	38
Region	709	877	1,081	1,094	1,540	1,601	2,775	2,106	3,031	2,632
Florida	42,360	64,810	86,752	84,075	109,924	116,240	122,719	144,427	154,302	164,074

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

Illustration A-8

Annual Building Permits
North Central Florida Region and State
Residential Units
2011 to 2020



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 increased from 2011 to 2019. However, in 2020, Daily Vehicle Miles Traveled in the region decreased due to the economic downturn caused by the COVID-19 pandemic. Statewide, Daily Vehicle Miles Traveled peaked in 2017 and gradually declined through 2020.

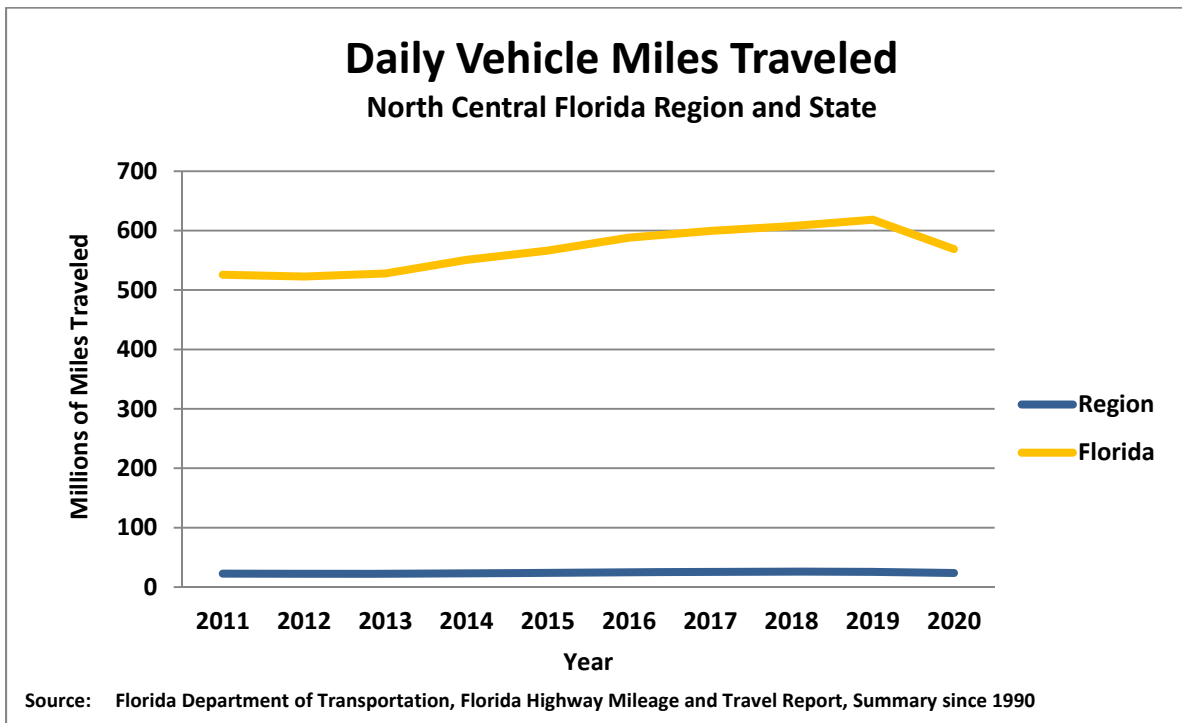
Table A-9
Daily Vehicle Miles Traveled
North Central Florida Region and State
Millions of Miles
2011 to 2020

Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	7.76	7.61	7.80	8.09	8.25	8.51	8.55	8.88	8.90	8.05
Bradford	0.99	0.99	1.02	1.03	1.05	1.20	1.25	1.22	1.24	1.06
Columbia	3.58	3.52	3.57	3.82	3.74	4.30	4.67	4.22	4.23	3.87
Dixie	0.76	0.66	0.64	0.64	0.67	0.69	0.69	0.69	0.72	0.69
Gilchrist	0.69	0.69	0.69	0.70	0.69	0.71	0.73	0.73	0.73	0.71
Hamilton	1.39	1.38	1.35	1.50	1.50	1.59	1.69	1.59	1.73	1.60
Lafayette	0.43	0.43	0.42	0.43	0.42	0.43	0.43	0.42	0.43	0.40
Levy	1.65	1.69	1.67	1.70	1.75	1.81	1.82	1.81	1.82	1.75
Madison	1.52	1.50	1.52	1.47	1.61	1.67	1.70	1.70	1.61	1.47
Suwannee	2.33	2.32	2.30	2.34	2.43	2.55	2.61	2.68	2.70	2.52
Taylor	1.04	1.06	1.02	1.05	1.06	1.13	1.15	1.12	1.14	1.05
Union	0.40	0.40	0.40	0.40	0.42	0.44	0.46	0.45	0.46	0.46
Region	22.54	22.25	22.41	23.16	23.58	25.02	25.74	25.52	25.72	23.62
Florida	525.63	522.88	527.95	550.80	566.36	588.06	599.52	607.71	618.42	568.78

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
2011 to 2020



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4. Business Climate & Competitiveness

Business Climate & Competitiveness:
**“Secure the position of the region
as business friendly climate.”**



Power District Catalyst Building, Gainesville

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.

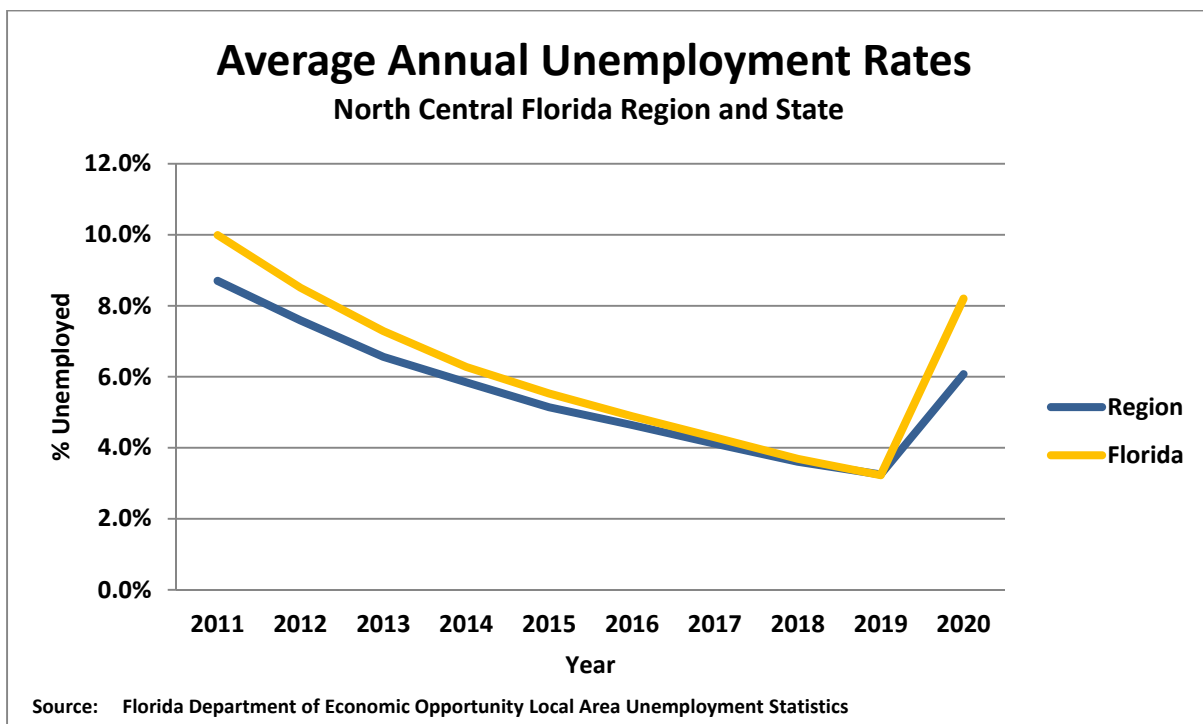
Table A-10
Average Annual Unemployment Rates
North Central Florida Region and State
2011 to 2020

Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	7.6%	6.7%	5.7%	5.2%	4.7%	4.3%	3.9%	3.4%	3.0%	5.8%
Bradford	9.1%	7.6%	6.3%	5.6%	4.9%	4.3%	3.7%	3.5%	3.3%	6.5%
Columbia	10.3%	8.9%	7.6%	6.6%	5.6%	4.9%	4.4%	3.9%	3.3%	6.4%
Dixie	12.3%	10.3%	8.5%	7.4%	6.3%	5.5%	4.8%	4.3%	3.9%	6.0%
Gilchrist	10.3%	9.1%	7.9%	6.7%	5.7%	5.0%	4.5%	3.9%	3.5%	5.3%
Hamilton	10.4%	8.9%	8.6%	7.6%	6.5%	5.7%	4.9%	4.3%	4.2%	8.4%
Lafayette	6.2%	5.7%	5.2%	5.1%	4.6%	4.4%	3.8%	3.5%	3.0%	4.7%
Levy	10.9%	9.3%	8.2%	6.8%	5.8%	5.2%	4.5%	4.0%	3.8%	6.6%
Madison	9.6%	8.6%	7.8%	7.1%	6.2%	5.3%	4.5%	4.0%	3.9%	6.7%
Suwannee	9.2%	8.0%	6.9%	6.3%	5.5%	4.9%	4.3%	3.8%	3.5%	6.2%
Taylor	10.1%	9.0%	7.8%	6.9%	6.8%	5.4%	4.6%	3.9%	3.7%	6.9%
Union	8.2%	7.2%	6.3%	6.0%	4.9%	4.4%	3.8%	3.3%	3.1%	5.1%
Region	8.7%	7.6%	6.6%	5.8%	5.1%	4.6%	4.1%	3.6%	3.2%	6.1%
Florida	10.0%	8.5%	7.3%	6.3%	5.5%	4.9%	4.3%	3.7%	3.2%	8.2%

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
2011 to 2020



b. Employment by Industry

As shown in Table A-11a and Illustration A-11a, state and local government, health care and retail trade have remained the predominant employment industries from 2011 to 2020 in the region. Private sector industries that posted significant employment gains over the period include Health Care, Waste Management, and Transportation and Warehousing.

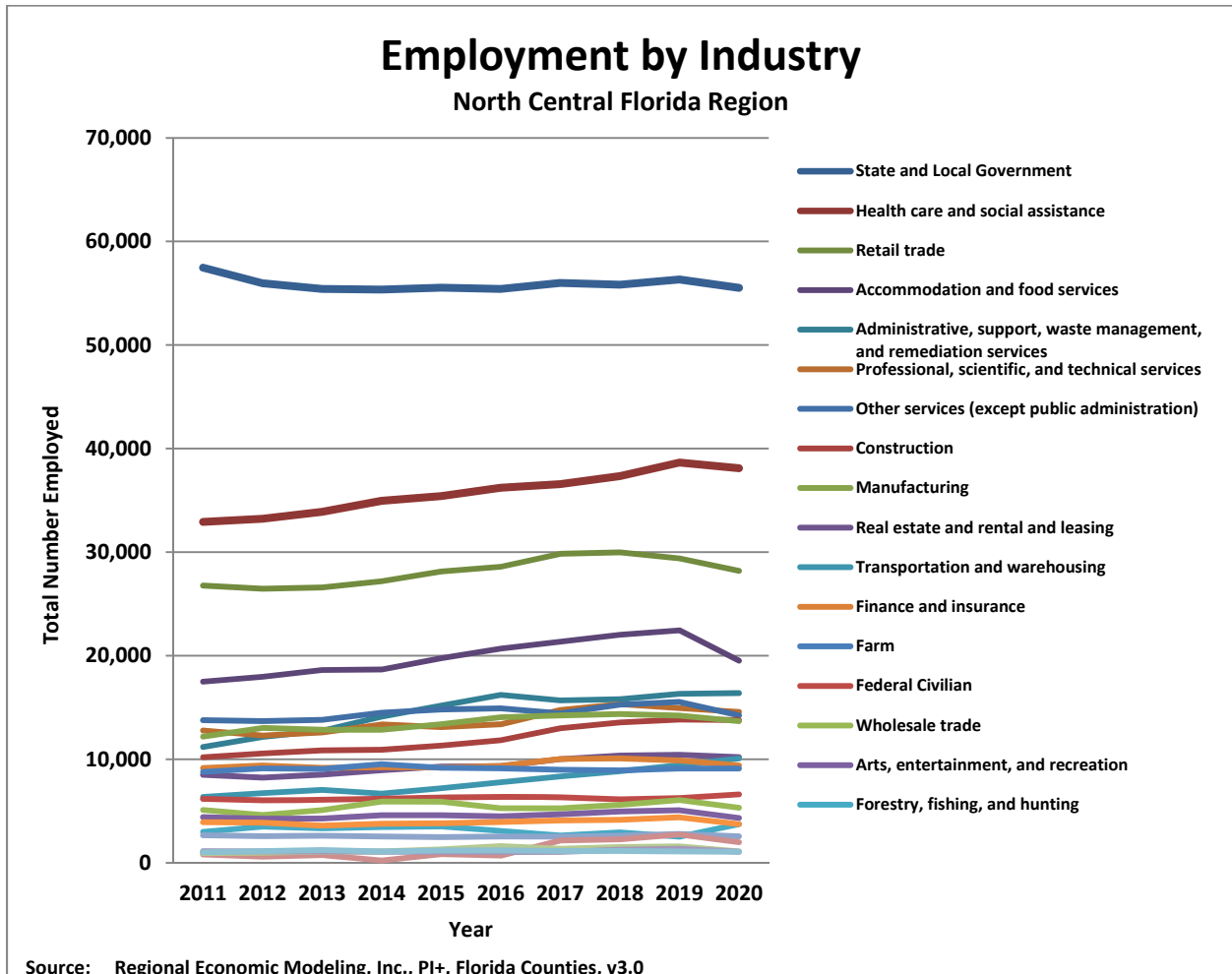
Table A-11a
Employment by Industry
North Central Florida Region
2011 to 2020

Industry	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
State and Local Government	57,464	55,963	55,412	55,350	55,535	55,410	55,997	55,826	56,321	55,517
Health care and social assistance	32,926	33,226	33,896	34,949	35,419	36,224	36,571	37,339	38,646	38,098
Retail trade	26,756	26,454	26,579	27,190	28,125	28,585	29,837	29,972	29,396	28,191
Accommodation and food services	17,489	17,957	18,620	18,664	19,755	20,676	21,350	22,019	22,446	19,518
Administrative, support, waste management, and remediation services	11,183	12,159	12,746	14,112	15,175	16,218	15,684	15,786	16,321	16,386
Professional, scientific, and technical services	12,779	12,289	12,589	13,364	13,098	13,375	14,753	15,311	14,944	14,575
Other services (except public administration)	13,769	13,677	13,792	14,494	14,803	14,907	14,441	15,277	15,535	14,240
Construction	10,201	10,559	10,855	10,906	11,314	11,830	12,987	13,560	13,835	13,787
Manufacturing	12,194	13,023	12,835	12,847	13,394	14,055	14,226	14,361	14,201	13,678
Real estate and rental and leasing	8,490	8,219	8,501	8,934	9,303	9,323	10,006	10,357	10,421	10,192
Transportation and warehousing	6,369	6,735	7,033	6,678	7,196	7,772	8,336	8,849	9,428	10,072
Finance and insurance	9,145	9,393	9,164	9,227	9,199	9,337	10,033	10,080	9,874	9,411
Farm	8,787	9,121	9,062	9,534	9,184	9,116	8,985	8,911	9,107	9,106
Federal Civilian	6,162	6,028	6,079	6,177	6,310	6,353	6,322	6,126	6,236	6,603
Wholesale trade	5,105	4,617	5,085	5,904	5,894	5,276	5,258	5,593	6,063	5,310
Arts, entertainment, and recreation	4,411	4,253	4,267	4,590	4,591	4,473	4,671	4,957	5,066	4,328
Forestry, fishing, and hunting	2,992	3,488	3,325	3,442	3,502	3,083	2,644	2,925	2,524	3,741
Educational services; private	3,915	3,877	3,586	3,772	3,808	3,935	4,083	4,142	4,396	3,734
Information	2,652	2,558	2,611	2,530	2,476	2,535	2,516	2,603	2,784	2,555
Mining	803	582	739	223	838	688	2,154	2,254	2,726	1,982
Management of companies and enterprises	934	963	1,073	1,091	1,282	1,607	1,347	1,512	1,570	1,102
Federal Military	1,128	1,085	1,084	1,060	1,052	1,037	1,047	1,257	1,354	1,065
Utilities	1,019	1,116	1,220	1,089	1,178	1,202	1,139	1,143	1,091	1,056

Source: Regional Economic Modeling, Inc., PI+, Florida Counties v3.0

Illustration A-11a

Employment by Industry North Central Florida Region 2011 to 2020



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 2011 to 2020, as a percentage of total employment.

Table A-11b

**Employment by Sector (Thousands)
North Central Florida Region and State
2011 to 2020**

Sector	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Employment-Region	257	257	260	266	272	277	284	290	294	284
Total Employment-State	17,860	18,137	18,559	19,160	19,787	20,276	20,876	21,535	21,872	20,866
Private Sector Employment-Region	192	194	198	204	210	214	221	227	230	221
Private Sector Employment-State	15,487	15,791	16,225	16,837	17,456	17,916	18,492	19,146	19,461	18,485
Public Sector Employment-Region	65	63	63	63	63	63	63	63	64	63
Public Sector Employment-State	2,373	2,347	2,335	2,323	2,331	2,360	2,384	2,389	2,412	2,381

Source: Regional Economic Modeling, Inc., PI+, Florida Counties v3.0

Table A-11c

**Percent Employment by Sector
North Central Florida Region
2011 to 2020**

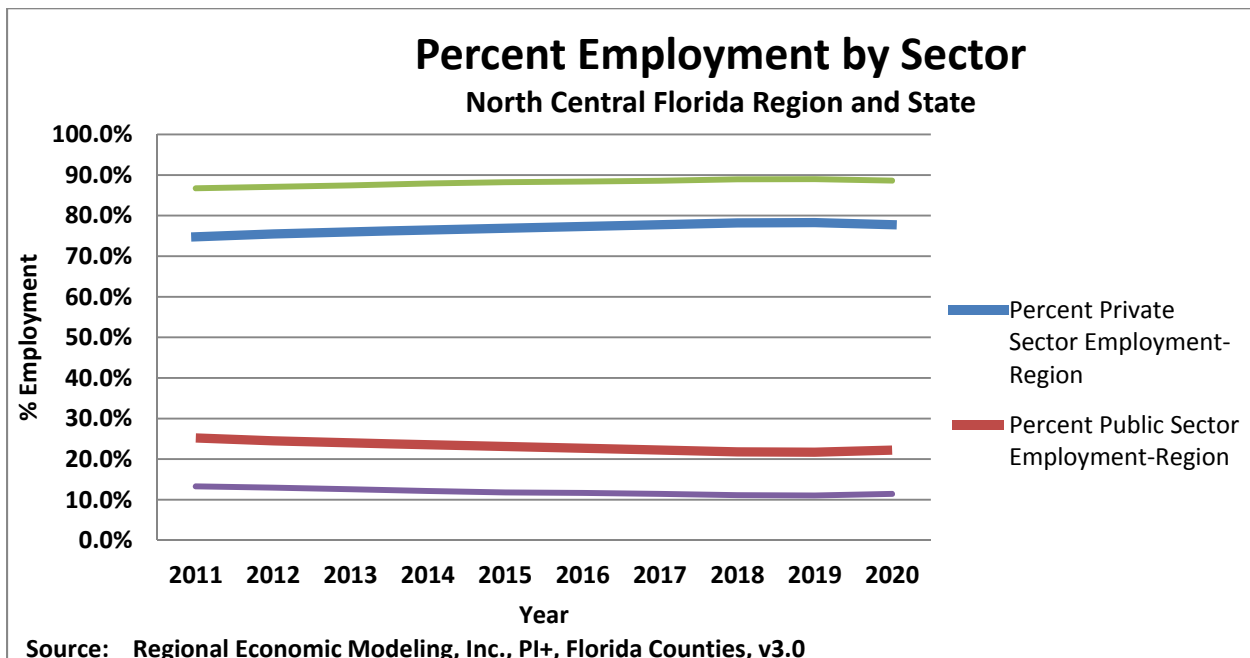
Sector	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Percent Private Sector Employment-Region	74.8%	75.5%	75.9%	76.5%	76.9%	77.3%	77.7%	78.2%	78.3%	77.8%
Percent Public Sector Employment-Region	25.2%	24.5%	24.1%	23.5%	23.1%	22.7%	22.3%	21.8%	21.7%	22.2%
Percent Private Sector Employment-State	86.7%	87.1%	87.4%	87.9%	88.2%	88.4%	88.6%	88.9%	89.0%	88.6%
Percent Public Sector Employment-State	13.3%	12.9%	12.6%	12.1%	11.8%	11.6%	11.4%	11.1%	11.0%	11.4%

Source: Regional Economic Modeling, Inc., PI+, Florida Counties v3.0

Illustration A-11b demonstrates that over the 2011 to 2020 period, public sector employment as a percent of total employment in the region gradually declined from 25.2 percent in 2011 to 22.2 percent in 2020. 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 2011 to 2020



c. Wages by Industry

As shown in Table A-12a and Illustration A-12a, the majority of industries experienced wage growth from 2011 to 2020. Industries that had the highest overall growth in average annual wages include Wholesale Trade, Information and Utilities. Only two industries, Forestry, Fishing and Hunting; and Mining had overall declining average annual wages for the period.

Table A-12a

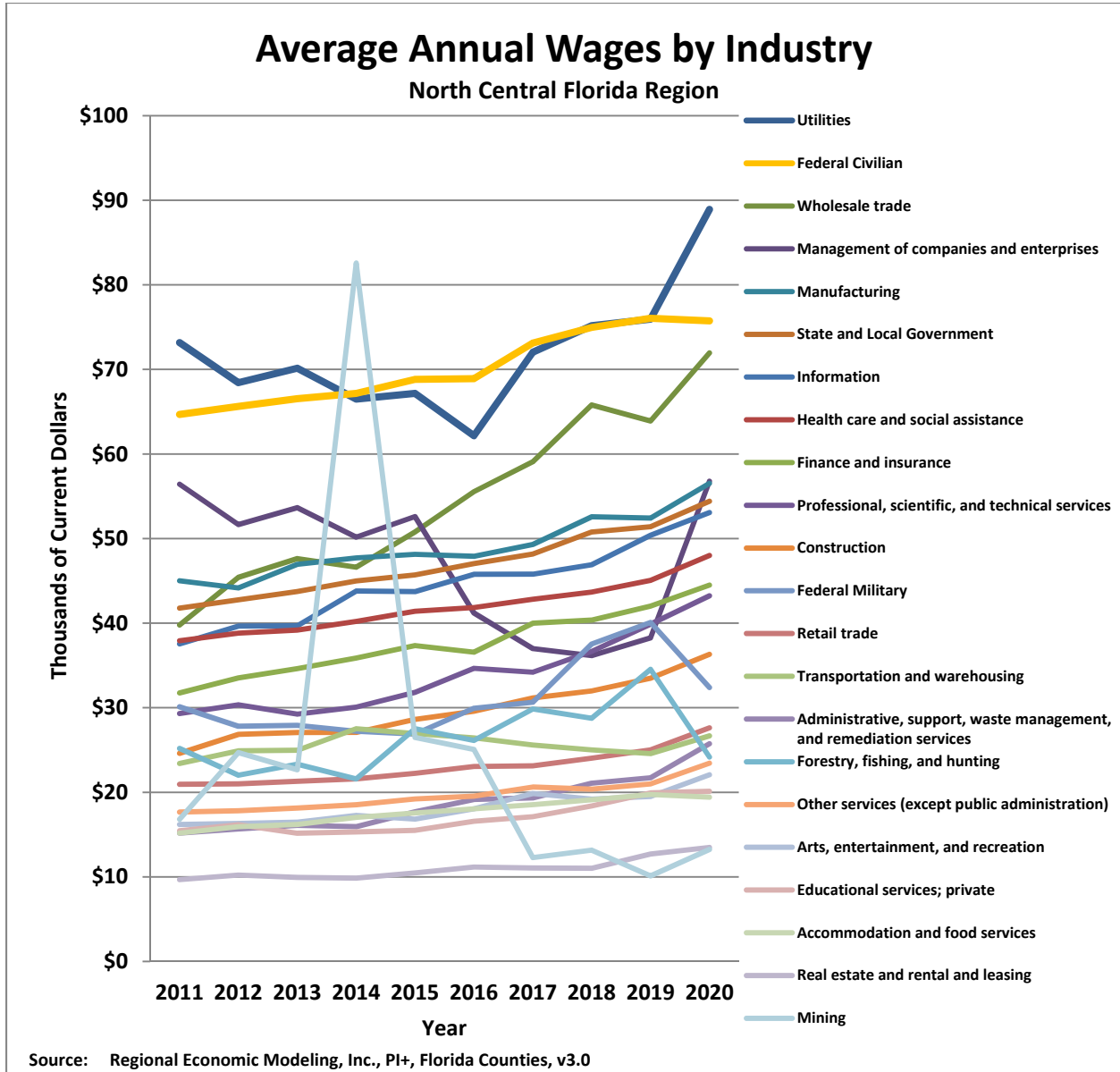
**Average Annual Wages by Industry
North Central Florida Region
Thousands of Current Dollars
2011 to 2020**

Industry	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Utilities	\$73.2	\$68.4	\$70.1	\$66.5	\$67.2	\$62.2	\$72.0	\$75.2	\$75.9	\$88.9
Federal Civilian	\$64.7	\$65.6	\$66.5	\$67.2	\$68.8	\$68.9	\$73.1	\$75.0	\$76.0	\$75.7
Wholesale trade	\$39.8	\$45.4	\$47.6	\$46.6	\$50.8	\$55.5	\$59.1	\$65.8	\$63.9	\$71.9
Management of companies and enterprises	\$56.4	\$51.7	\$53.7	\$50.2	\$52.6	\$41.2	\$37.0	\$36.2	\$38.3	\$56.8
Manufacturing	\$45.0	\$44.2	\$47.0	\$47.7	\$48.1	\$47.9	\$49.3	\$52.6	\$52.4	\$56.5
State and Local Government	\$41.8	\$42.8	\$43.7	\$45.0	\$45.7	\$47.0	\$48.2	\$50.8	\$51.4	\$54.4
Information	\$37.6	\$39.6	\$39.7	\$43.8	\$43.7	\$45.8	\$45.8	\$46.9	\$50.4	\$53.1
Health care and social assistance	\$37.9	\$38.8	\$39.2	\$40.2	\$41.4	\$41.8	\$42.8	\$43.7	\$45.1	\$48.0
Finance and insurance	\$31.8	\$33.5	\$34.6	\$35.9	\$37.4	\$36.6	\$40.0	\$40.4	\$42.0	\$44.5
Professional, scientific, and technical services	\$29.3	\$30.3	\$29.2	\$30.1	\$31.8	\$34.7	\$34.2	\$36.7	\$39.9	\$43.2
Construction	\$24.6	\$26.8	\$27.1	\$27.1	\$28.6	\$29.6	\$31.1	\$32.0	\$33.5	\$36.3
Federal Military	\$30.1	\$27.8	\$27.9	\$27.2	\$26.9	\$29.9	\$30.7	\$37.5	\$40.1	\$32.4
Retail trade	\$20.9	\$21.0	\$21.3	\$21.6	\$22.2	\$23.1	\$23.1	\$24.0	\$25.0	\$27.6
Transportation and warehousing management, and remediation services	\$23.4	\$24.9	\$25.0	\$27.5	\$26.9	\$26.4	\$25.6	\$25.0	\$24.6	\$26.7
	\$15.2	\$15.7	\$16.1	\$15.9	\$17.7	\$19.2	\$19.3	\$21.1	\$21.7	\$25.7
Forestry, fishing, and hunting	\$25.2	\$22.0	\$23.3	\$21.6	\$27.5	\$26.1	\$29.9	\$28.8	\$34.5	\$24.2
Other services (except public administration)	\$17.7	\$17.8	\$18.1	\$18.5	\$19.2	\$19.5	\$20.6	\$20.4	\$21.0	\$23.4
Arts, entertainment, and recreation	\$16.2	\$16.3	\$16.5	\$17.3	\$16.8	\$18.1	\$19.9	\$19.2	\$19.5	\$22.1
Educational services; private	\$15.5	\$16.2	\$15.2	\$15.3	\$15.5	\$16.6	\$17.1	\$18.4	\$19.9	\$20.1
Accommodation and food services	\$15.2	\$15.9	\$16.2	\$17.0	\$17.6	\$18.1	\$18.5	\$19.1	\$19.7	\$19.4
Real estate and rental and leasing	\$9.7	\$10.2	\$9.9	\$9.8	\$10.5	\$11.2	\$11.0	\$11.0	\$12.7	\$13.5
Mining	\$16.8	\$24.7	\$22.7	\$82.6	\$26.5	\$25.1	\$12.3	\$13.2	\$10.1	\$13.2
Farm	\$5.1	\$5.1	\$6.2	\$6.1	\$5.3	\$6.2	\$5.4	\$6.2	\$7.6	\$7.8

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v3.0

Illustration A-12a

Average Annual Wages by Industry
North Central Florida Region
Thousands of Current Dollars
2011 to 2020



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 remained relatively constant from 2011 to 2020 in private sector employment. The gap between state and regional average annual wages has declined from 2011 to 2020 in public sector employment with regional average annual wages, in 2020, exceeding state average annual wages in the public sector.

Table A-12b

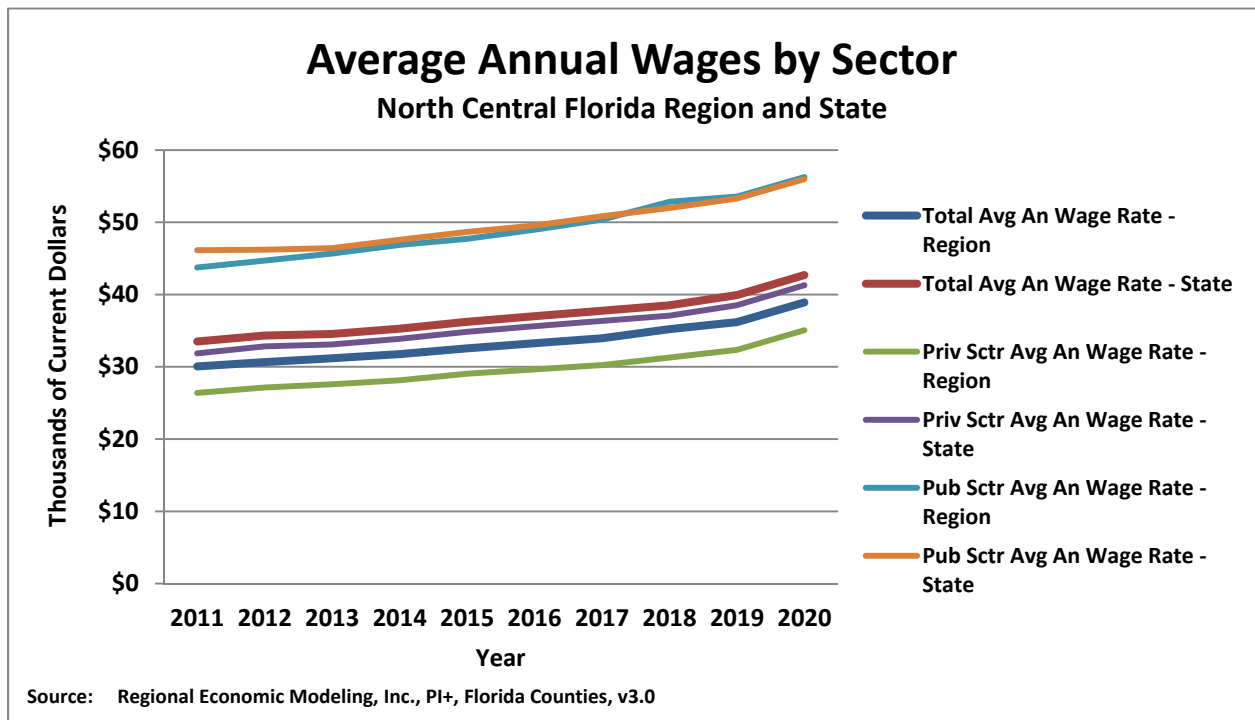
**Average Annual Wages by Sector
North Central Florida Region and State
Thousands of Current Dollars
2011 to 2020**

Sector	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Avg An Wage Rate - Region	\$30.0	\$30.7	\$31.2	\$31.8	\$32.6	\$33.3	\$33.9	\$35.2	\$36.2	\$38.9
Total Avg An Wage Rate - State	\$33.5	\$34.3	\$34.6	\$35.3	\$36.2	\$37.0	\$37.7	\$38.5	\$39.9	\$42.7
Priv Sctr Avg An Wage Rate - Region	\$26.4	\$27.1	\$27.6	\$28.1	\$29.1	\$29.7	\$30.3	\$31.3	\$32.3	\$35.1
Priv Sctr Avg An Wage Rate - State	\$31.9	\$32.8	\$33.1	\$33.9	\$34.8	\$35.6	\$36.3	\$37.1	\$38.5	\$41.3
Pub Sctr Avg An Wage Rate - Region	\$43.8	\$44.7	\$45.7	\$46.9	\$47.7	\$49.0	\$50.4	\$52.9	\$53.6	\$56.3
Pub Sctr Avg An Wage Rate - State	\$46.1	\$46.2	\$46.4	\$47.6	\$48.7	\$49.5	\$50.8	\$52.0	\$53.3	\$56.0

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v3.0

Illustration A-12b

Average Annual Wages by Sector North Central Florida Region and State Thousands of Current Dollars 2011 to 2020



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5. Civic & Governance Systems

Civic & Governance Systems:
**“Markets need structure to deliver
services and organize business.”**



Lafayette County Courthouse, Mayo

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 2011 to 2020, due primarily to rising property value assessments. However, in 2020, average millage rate of 15.76 in the region remains higher than the average millage rate of 13.44 in the state.

Table A-13
Millage Rates
North Central Florida Region and State
2011 to 2020

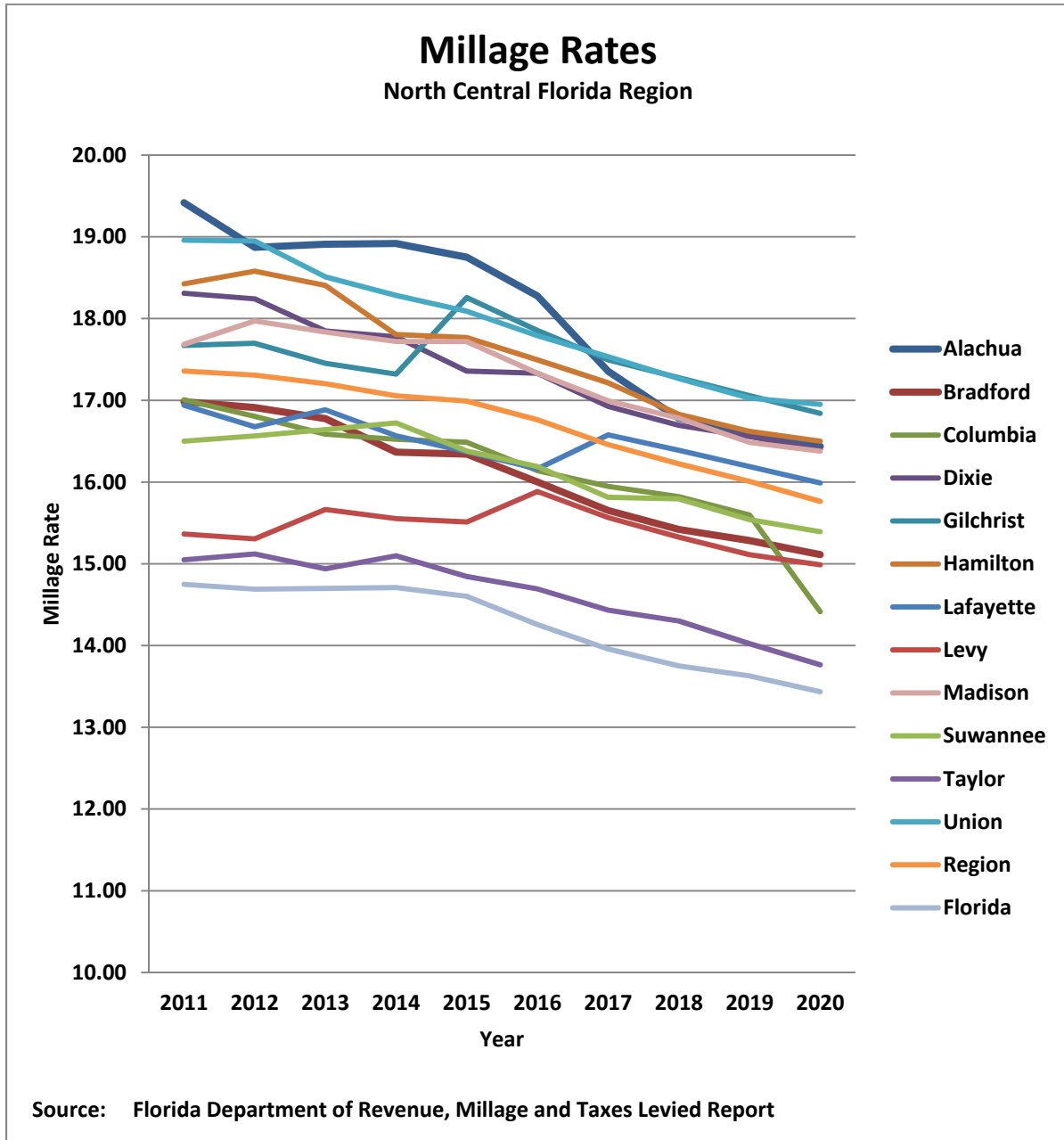
Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	19.42	18.87	18.91	18.92	18.75	18.28	17.36	16.78	16.60	16.44
Bradford	16.98	16.91	16.78	16.37	16.34	16.00	15.65	15.42	15.28	15.11
Columbia	17.01	16.80	16.59	16.52	16.49	16.14	15.95	15.82	15.60	14.41
Dixie	18.31	18.24	17.85	17.78	17.36	17.33	16.93	16.69	16.56	16.40
Gilchrist	17.67	17.70	17.45	17.32	18.26	17.85	17.49	17.28	17.06	16.84
Hamilton	18.43	18.58	18.41	17.80	17.77	17.50	17.21	16.83	16.62	16.50
Lafayette	16.94	16.68	16.88	16.57	16.37	16.16	16.58	16.39	16.19	15.99
Levy	15.37	15.31	15.66	15.55	15.51	15.89	15.57	15.33	15.11	14.99
Madison	17.69	17.97	17.83	17.72	17.72	17.33	16.99	16.78	16.48	16.38
Suwannee	16.50	16.57	16.64	16.72	16.38	16.19	15.81	15.79	15.54	15.39
Taylor	15.05	15.12	14.94	15.10	14.84	14.69	14.43	14.30	14.02	13.76
Union	18.96	18.95	18.51	18.28	18.09	17.79	17.53	17.27	17.03	16.95
Region	17.36	17.31	17.20	17.05	16.99	16.76	16.46	16.22	16.01	15.76
Florida	14.75	14.69	14.70	14.71	14.60	14.26	13.96	13.75	13.63	13.44

Source: Florida Department of Revenue, Property Tax Analysis, Millage, Levies and Collections;
Florida Ad Valorem Valuation and Tax Data 2011 to 2020; 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



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

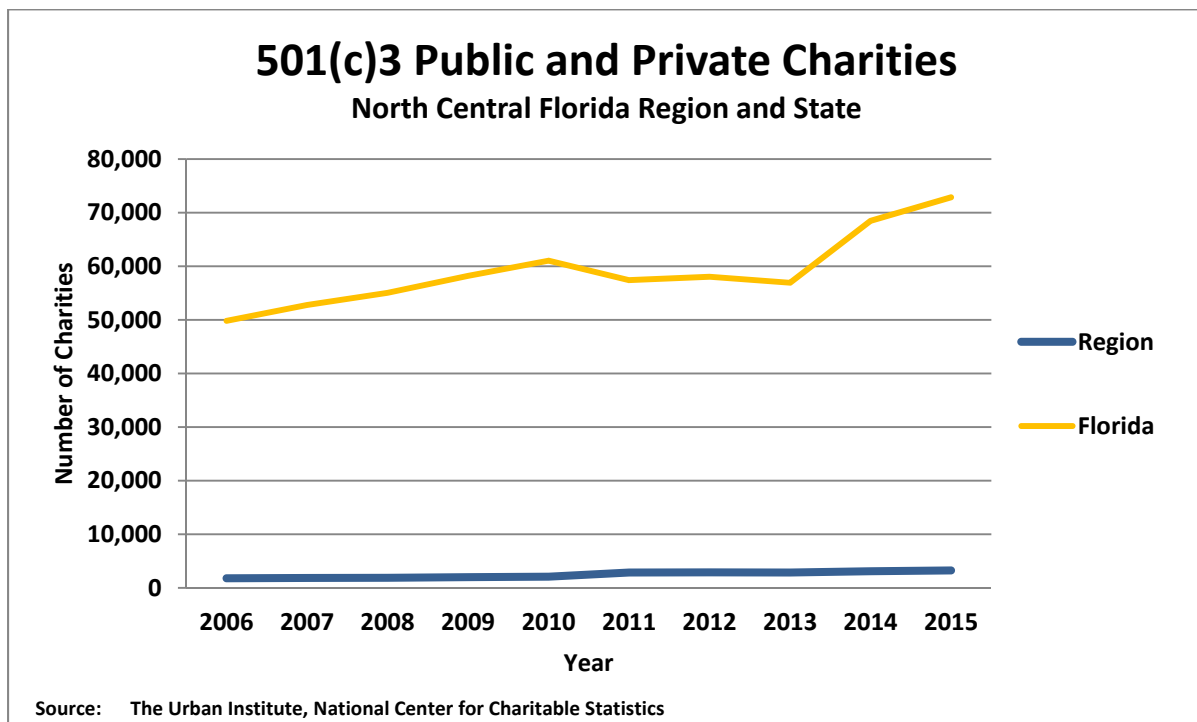
Area	Year									
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Alachua	1,091	1,137	1,135	1,219	1,266	1,189	1,197	1,196	1,265	1,326
Bradford	59	60	63	67	65	140	137	129	132	144
Columbia	170	172	182	192	200	183	188	194	194	204
Dixie	32	31	30	34	35	691	695	688	702	719
Gilchrist	38	39	40	43	48	49	49	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

Note: Data for registered 501(c)3 organizations public and private foundation charities are longer available at the county level.

Illustration A-14

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



Note: Data for registered 501(c)3 organizations public and private foundation charities are longer available at the county level.

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 2010 to 2020, with slightly greater regional participation than the state in four of the election years. Voter participation was significantly greater during the presidential election cycle and dropped off during non-presidential election years.

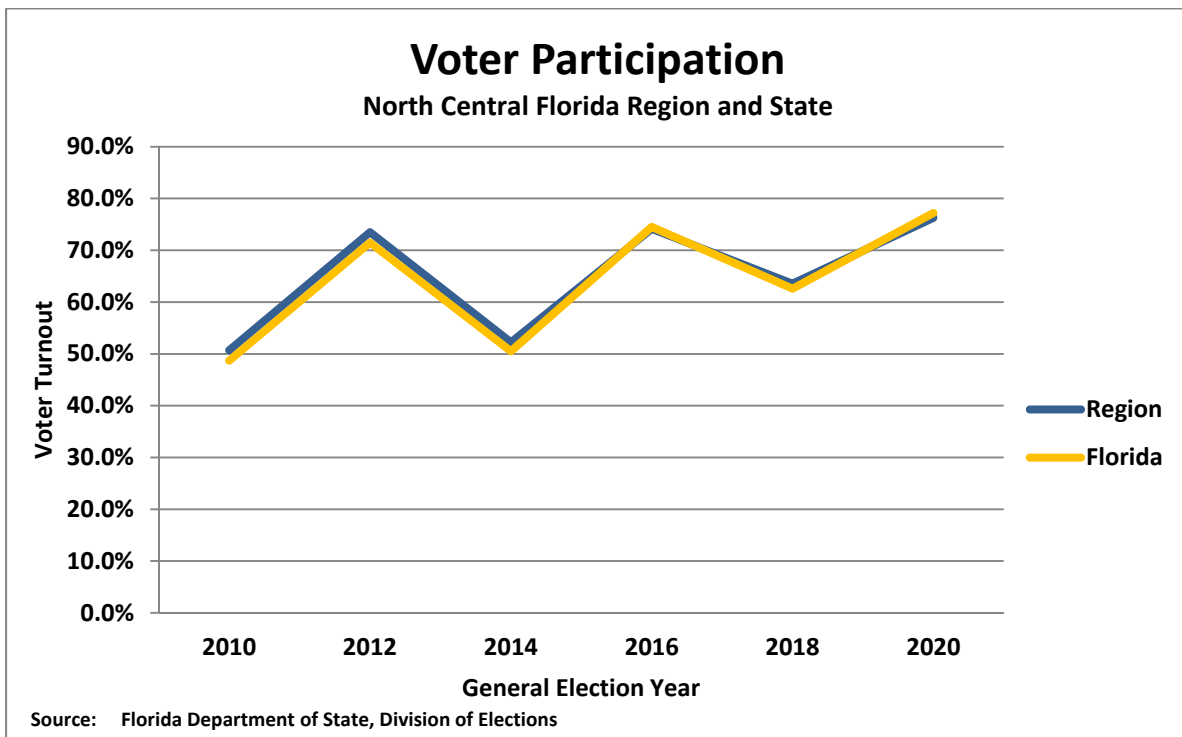
Table A-15
Voter Participation
North Central Florida Region and State
Biennial General Elections
2010 to 2020

Area	General Election Year					
	2010	2012	2014	2016	2018	2020
Alachua	49.4%	73.5%	50.2%	73.6%	64.2%	75.4%
Bradford	51.8%	75.7%	55.4%	76.2%	64.9%	77.2%
Columbia	48.1%	76.9%	52.4%	77.6%	62.0%	75.2%
Dixie	53.5%	68.5%	55.3%	73.4%	60.6%	77.5%
Gilchrist	50.5%	72.0%	54.6%	74.6%	63.2%	77.9%
Hamilton	51.6%	68.6%	48.6%	68.4%	59.4%	72.5%
Lafayette	58.1%	75.4%	59.9%	77.0%	65.5%	80.8%
Levy	51.9%	74.0%	52.2%	73.1%	61.8%	77.4%
Madison	55.5%	72.7%	55.6%	74.4%	64.8%	80.3%
Suwannee	54.7%	71.1%	51.5%	71.5%	62.1%	76.4%
Taylor	52.4%	73.3%	55.9%	76.5%	65.8%	79.7%
Union	52.3%	74.6%	72.1%	79.3%	66.3%	81.4%
Region	50.7%	73.5%	52.2%	74.1%	63.6%	76.3%
Florida	48.7%	71.5%	50.5%	74.5%	62.6%	77.2%

Source: Florida Department of State, Division of Elections
<<https://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
2010 to 2020



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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.”**



Downtown Arts Festival, Gainesville

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 2011 to 2020. However, the gap between state and regional per capita incomes increased from 2011 to 2020.

Table A-16

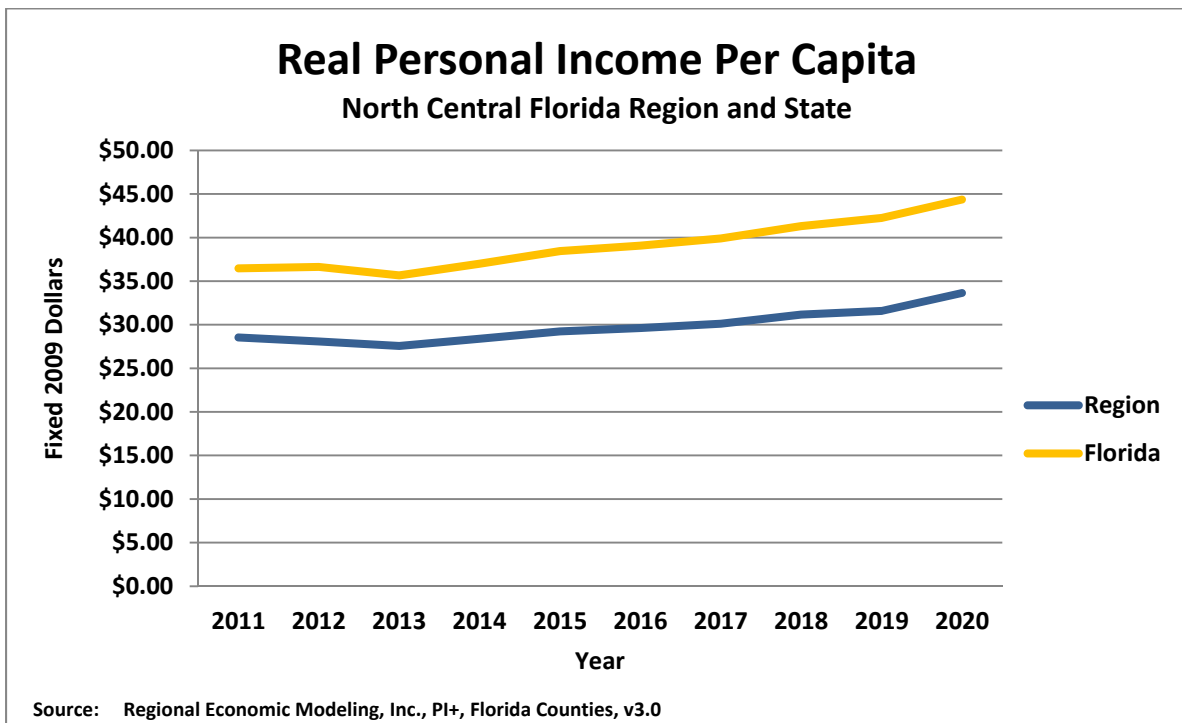
**Real Personal Per Capita Income
North Central Florida Region and State
Fixed 2012 Dollars
2011 to 2020**

Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	\$33.17	\$32.40	\$31.89	\$32.80	\$33.53	\$34.32	\$35.04	\$36.50	\$37.44	\$39.59
Bradford	\$24.51	\$25.43	\$25.44	\$25.87	\$26.48	\$26.67	\$27.16	\$27.60	\$27.46	\$29.27
Columbia	\$27.04	\$26.05	\$25.46	\$26.06	\$26.94	\$27.42	\$27.47	\$28.48	\$28.50	\$30.44
Dixie	\$20.59	\$20.97	\$20.73	\$21.45	\$21.80	\$21.90	\$22.60	\$23.01	\$22.83	\$24.18
Gilchrist	\$25.14	\$26.05	\$24.66	\$26.14	\$25.75	\$26.32	\$27.08	\$27.39	\$27.24	\$29.72
Hamilton	\$20.48	\$19.12	\$19.43	\$19.67	\$20.41	\$20.31	\$20.69	\$21.54	\$21.26	\$23.02
Lafayette	\$18.82	\$18.81	\$19.10	\$20.00	\$20.95	\$18.69	\$19.20	\$19.09	\$20.94	\$22.12
Levy	\$26.40	\$26.25	\$26.10	\$27.28	\$28.11	\$28.56	\$29.31	\$29.34	\$29.67	\$32.24
Madison	\$22.78	\$22.59	\$22.88	\$24.22	\$25.46	\$24.76	\$24.89	\$25.74	\$25.46	\$28.09
Suwannee	\$26.88	\$27.14	\$25.23	\$25.89	\$27.74	\$26.69	\$26.55	\$27.11	\$26.69	\$28.58
Taylor	\$24.03	\$22.88	\$22.02	\$22.16	\$23.22	\$23.06	\$23.16	\$24.49	\$23.99	\$25.63
Union	\$16.64	\$16.35	\$16.23	\$16.39	\$16.91	\$17.06	\$17.37	\$18.03	\$18.30	\$19.93
Region	\$28.53	\$28.08	\$27.56	\$28.39	\$29.24	\$29.62	\$30.12	\$31.17	\$31.58	\$33.64
Florida	\$36.47	\$36.64	\$35.66	\$37.00	\$38.44	\$39.08	\$39.90	\$41.31	\$42.24	\$44.35

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v3.0

Illustration A-16

Real Personal Per Capita Income
North Central Florida Region and State
Fixed 2012 Dollars
2011 to 2020



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, Hamilton County, Lafayette County and Levy County, the relative cost of a home in the region was less than one-half that of the nation as well as significantly less than the state. From 2011 to 2020, the region as a whole remained the same compared to the nation, while the overall relative prices of the state increased in comparison to the nation.

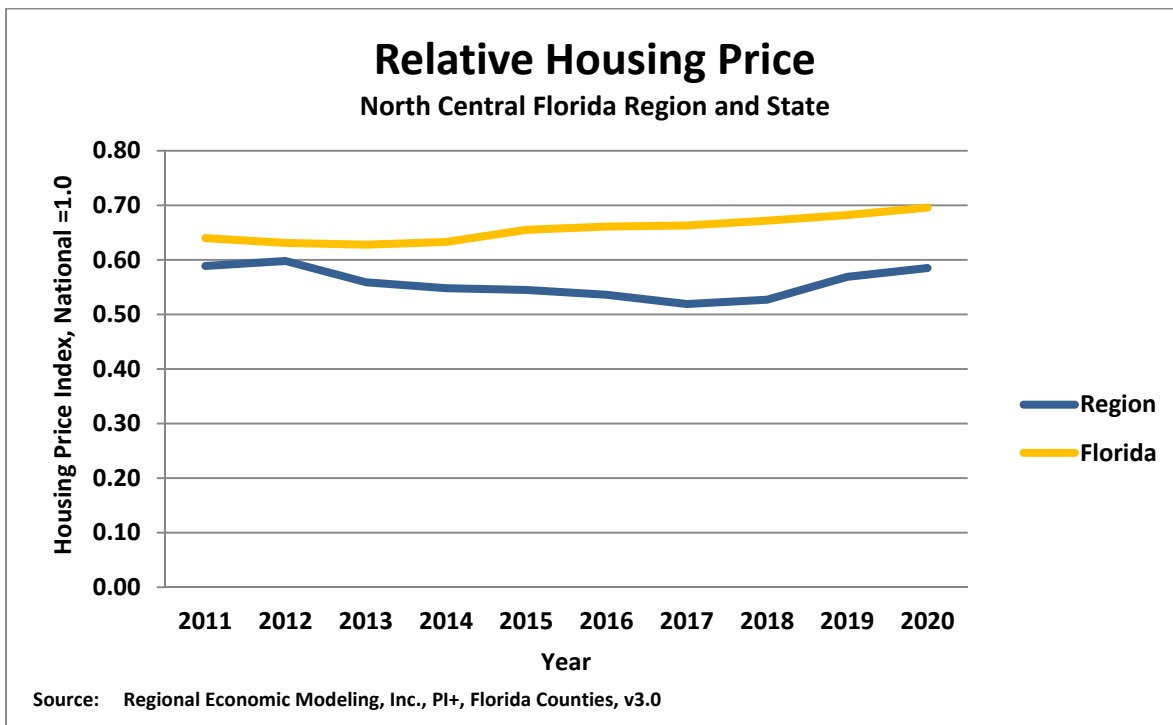
Table A-17
Relative Housing Price
North Central Florida Region and State
National Index = 1.0
2011 to 2020

Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	0.69	0.71	0.65	0.62	0.62	0.60	0.55	0.58	0.64	0.65
Bradford	0.43	0.43	0.43	0.44	0.45	0.46	0.47	0.48	0.49	0.51
Columbia	0.43	0.41	0.40	0.42	0.40	0.38	0.47	0.38	0.47	0.49
Dixie	0.38	0.38	0.38	0.38	0.39	0.40	0.41	0.42	0.42	0.44
Gilchrist	0.42	0.41	0.42	0.42	0.43	0.44	0.45	0.46	0.47	0.48
Hamilton	0.46	0.46	0.46	0.46	0.48	0.49	0.50	0.51	0.52	0.54
Lafayette	0.47	0.47	0.47	0.48	0.49	0.51	0.52	0.52	0.53	0.56
Levy	0.77	0.77	0.73	0.72	0.65	0.67	0.65	0.64	0.65	0.67
Madison	0.34	0.34	0.34	0.34	0.35	0.36	0.37	0.37	0.38	0.39
Suwannee	0.39	0.39	0.39	0.40	0.41	0.42	0.43	0.43	0.44	0.43
Taylor	0.37	0.36	0.37	0.37	0.38	0.39	0.40	0.40	0.41	0.43
Union	0.38	0.38	0.38	0.38	0.39	0.40	0.41	0.42	0.43	0.42
Region	0.59	0.60	0.56	0.55	0.55	0.54	0.52	0.53	0.57	0.59
Florida	0.64	0.63	0.63	0.63	0.66	0.66	0.66	0.67	0.68	0.70

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v3.0

Illustration A-17

Relative Housing Price
North Central Florida Region and State
National Index = 1.0
2011 to 2020



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 decreased over the 2011 to 2020 period from 23.4 percent to 17.7 percent. The gap between the region and state also decreased over the same period from 6.4 percent in 2011 to 5.3 percent in 2020.

Table A-18

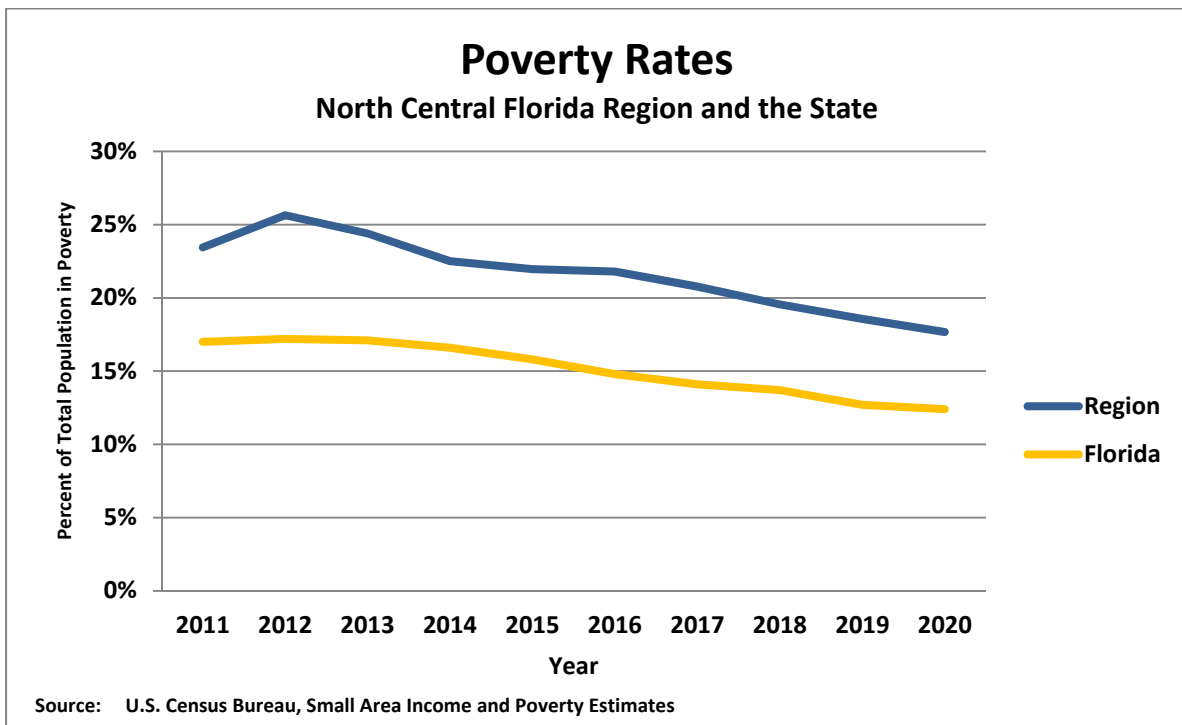
**Percent of Persons Living in Poverty
North Central Florida Region and State
2011 to 2020**

Area	Year									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Alachua	23.5%	26.6%	25.7%	21.6%	21.1%	22.3%	21.2%	19.8%	18.4%	17.2%
Bradford	23.1%	23.1%	21.8%	22.6%	21.3%	18.6%	19.1%	19.5%	21.0%	17.5%
Columbia	21.7%	23.4%	18.8%	21.7%	19.7%	17.8%	16.5%	17.3%	15.6%	15.6%
Dixie	25.2%	27.3%	27.1%	27.1%	29.3%	25.4%	24.4%	24.7%	22.2%	23.2%
Gilchrist	19.5%	22.0%	21.9%	19.8%	19.2%	17.3%	16.1%	16.8%	15.0%	14.5%
Hamilton	31.9%	28.9%	29.2%	31.7%	31.8%	28.9%	24.0%	27.6%	32.5%	24.2%
Lafayette	23.8%	26.4%	25.2%	25.6%	23.8%	23.3%	22.7%	21.0%	18.0%	20.7%
Levy	22.0%	22.7%	23.6%	21.2%	22.1%	21.4%	20.8%	16.1%	18.2%	16.9%
Madison	25.9%	25.6%	28.9%	27.7%	27.0%	31.9%	28.3%	22.8%	22.7%	23.8%
Suwannee	24.7%	28.1%	24.6%	23.7%	23.6%	20.4%	20.3%	19.3%	17.1%	17.7%
Taylor	22.7%	24.2%	23.9%	23.4%	21.2%	22.5%	23.8%	21.6%	19.9%	19.3%
Union	25.3%	26.2%	23.8%	24.3%	26.2%	24.7%	22.2%	20.6%	19.9%	20.7%
Region	23.4%	25.6%	24.4%	22.5%	22.0%	21.8%	20.8%	19.6%	18.6%	17.7%
Florida	17.0%	17.2%	17.1%	16.6%	15.8%	14.8%	14.1%	13.7%	12.7%	12.4%

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

Illustration A-18

Percent of Persons Living in Poverty
North Central Florida Region and State
2011 to 2020



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:

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

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 2020 to 2040 based upon the Shift-Share analysis.

As shown in Illustration A-19, the largest projected employment gains are anticipated be in State and Local Government; Health Care and Social Assistance; Accommodation and Food Services; Other Services (except Public Administration; and Manufacturing. The combined employment gains in these five industries are projected to exceed 46,000 new jobs in the region by 2040, which accounts for nearly 60 percent of the total anticipated employment gains.

Illustration A-19

Shift-Share Analysis North Central Florida Region Top Five Projected Industry Employment Gains 2020 to 2040

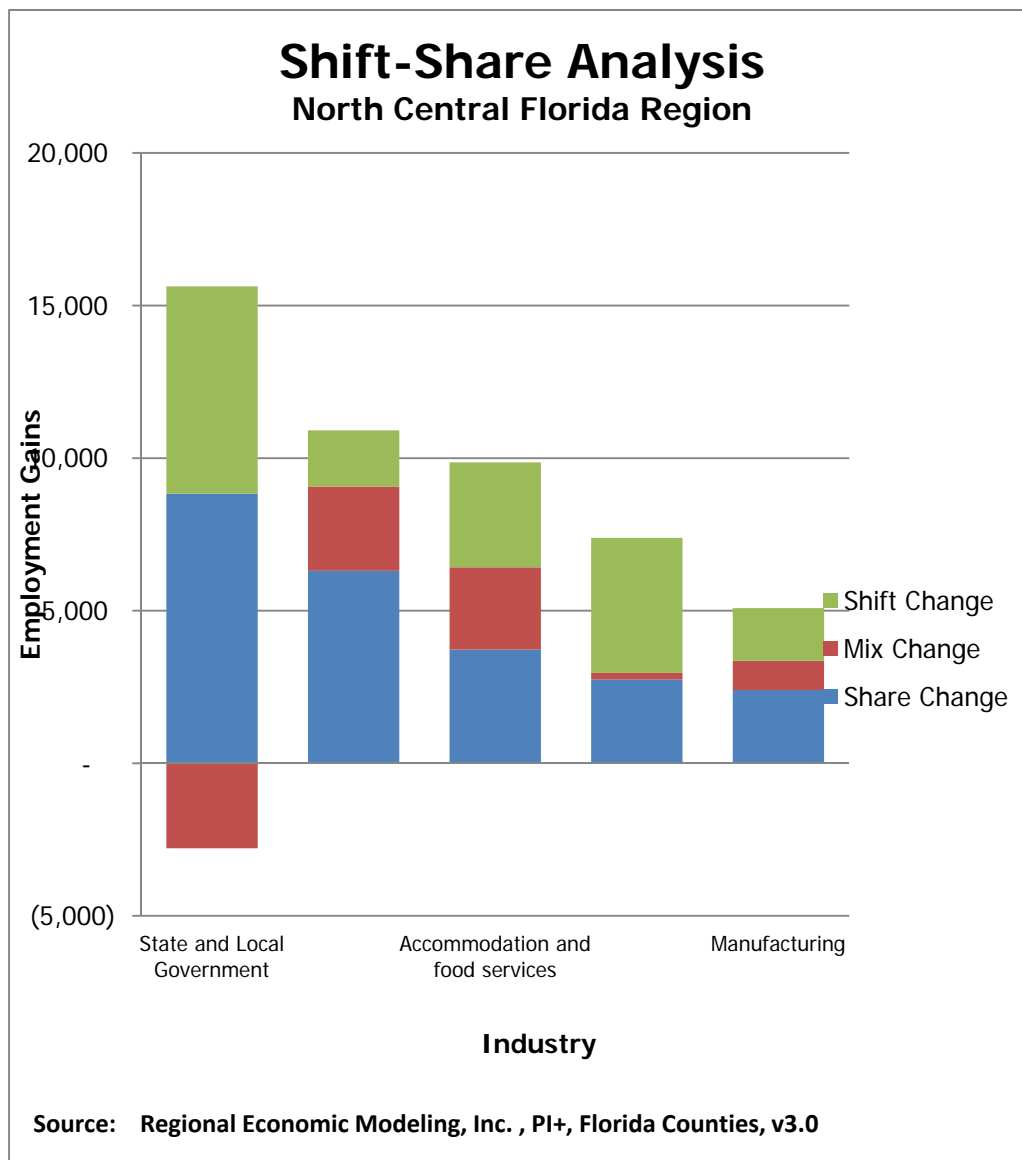


Table A-19 lists the 23 industry sectors measured and the components of estimated employment change for each industry, ranked from highest to lowest projected gain. The State and Local Government industry is anticipated to have the highest employment gains in the region. Health Care and Social Assistance; and Accommodation and Food Service are also anticipated to have substantial growth over the period.

Table A-19

**Shift-Share Analysis
North Central Florida Region
Top 10 Projected Industry Employment Gains
2020 to 2040**

Industry	2020 to 2040			
	Share Change	Mix Change	Shift Change	Shift-Share Change
State and Local Government	8,833	(2,784)	6,798	12,848
Health care and social assistance	6,306	2,763	1,842	10,910
Accommodation and food services	3,729	2,691	3,443	9,863
Other services (except public administration)	2,743	218	4,426	7,388
Manufacturing	2,400	958	1,728	5,086
Professional, scientific, and technical services	2,511	1,466	1,043	5,020
Administrative, support, waste management, and remediation services	2,666	524	1,106	4,296
Transportation and warehousing	1,778	607	1,453	3,839
Arts, entertainment, and recreation	1,019	1,675	1,142	3,836
Retail trade	4,101	(4,859)	3,991	3,234
Construction	2,177	(1,220)	2,094	3,052
Real estate and rental and leasing	1,666	(306)	1,378	2,738
Educational services; private	657	323	422	1,402
Farm	1,305	(434)	(0)	871
Mining	358	(30)	498	826
Wholesale trade	796	(519)	535	812
Federal Civilian	962	(190)	(0)	773
Forestry, fishing, and hunting	561	383	(369)	575
Management of companies and enterprises	157	(73)	13	97
Information	338	(248)	(86)	4
Federal Military	136	(174)	(0)	(38)
Utilities	130	(297)	87	(80)
Finance and insurance	1,233	(1,362)	40	(90)
Total:	46,566	(888)	31,585	77,263

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v3.0

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 Social Assistance; and Retail Trade are the industries projected to experience the highest growth and comprise over 40 percent of all employment gains in the share change category.

Table A-20
Employment Share Change
North Central Florida Region
2020 to 2040

Industry	2020 to 2040
	Share Change
State and Local Government	8,833
Health care and social assistance	6,306
Retail trade	4,101
Accommodation and food services	3,729
Other services (except public administration)	2,743
Administrative, support, waste management, and remediation services	2,666
Professional, scientific, and technical services	2,511
Manufacturing	2,400
Construction	2,177
Transportation and warehousing	1,778
Real estate and rental and leasing	1,666
Farm	1,305
Finance and insurance	1,233
Arts, entertainment, and recreation	1,019
Federal Civilian	962
Wholesale trade	796
Educational services; private	657
Forestry, fishing, and hunting	561
Mining	358
Information	338
Management of companies and enterprises	157
Federal Military	136
Utilities	130
Total:	46,566

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v3.0

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 and Social Assistance 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. Retail Trade is expected to decline over the time period.

Table A-21
Employment Mix Change
North Central Florida Region
2020 to 2040

Industry	2020 - 2040
	Mix Change
Health care and social assistance	2,763
Accommodation and food services	2,691
Arts, entertainment, and recreation	1,675
Professional, scientific, and technical services	1,466
Manufacturing	958
Transportation and warehousing	607
Administrative, support, waste management, and remediation services	524
Forestry, fishing, and hunting	383
Educational services; private	323
Other services (except public administration)	218
Mining	(30)
Management of companies and enterprises	(73)
Federal Military	(174)
Federal Civilian	(190)
Information	(248)
Utilities	(297)
Real estate and rental and leasing	(306)
Farm	(434)
Wholesale trade	(519)
Construction	(1,220)
Finance and insurance	(1,362)
State and Local Government	(2,784)
Retail trade	(4,859)
Total:	(888)

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v3.0

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 Other Services (except Public Administration) industry in the region shows a significant projected competitive advantage over national trends.

Table A-22
Employment Shift Change
North Central Florida Region
2020 to 2040

Industry	2020 - 2040
	Shift Change
State and Local Government	6,798
Other services (except public administration)	4,426
Retail trade	3,991
Accommodation and food services	3,443
Construction	2,094
Health care and social assistance	1,842
Manufacturing	1,728
Transportation and warehousing	1,453
Real estate and rental and leasing	1,378
Arts, entertainment, and recreation	1,142
Administrative, support, waste management, and remediation services	1,106
Professional, scientific, and technical services	1,043
Wholesale trade	535
Mining	498
Educational services; private	422
Utilities	87
Finance and insurance	40
Management of companies and enterprises	13
Federal Civilian	(0)
Federal Military	(0)
Farm	(0)
Information	(86)
Forestry, fishing, and hunting	(369)
Total:	31,585

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v3.0

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:

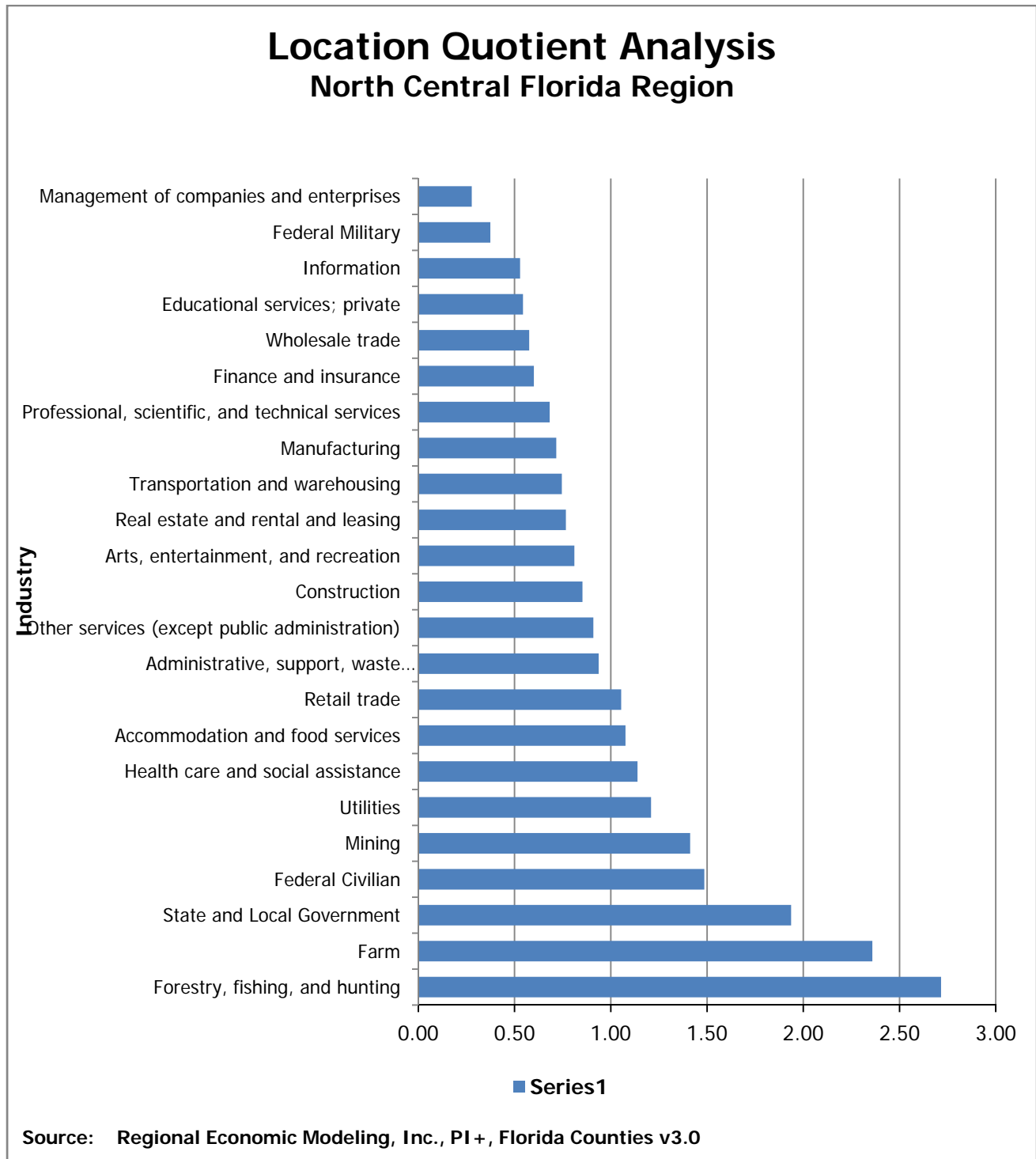
e_i = Local employment in industry i e_i = Total local employment
 E_i = Reference area employment in industry i E_i = Total reference area employment

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. Nine industries in the region have a location quotient greater than one: Forestry and Fishing; Farming; State and Local Government; Federal Civilian Government; Mining; Utilities, Healthcare and Social Assistance; 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
2020



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 2040. The industries are ranked highest to lowest by their location quotient scores in 2020. 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
2020 to 2040**

Industry	Year				
	2020	2025	2030	2035	2040
Forestry, fishing, and hunting	2.72	2.60	2.48	2.37	2.28
Farm	2.36	2.29	2.23	2.18	2.15
State and Local Government	1.94	1.96	1.96	1.96	1.97
Mining	1.41	1.40	1.45	1.51	1.58
Federal Civilian	1.49	1.44	1.40	1.38	1.36
Utilities	1.21	1.21	1.21	1.21	1.21
Accommodation and food services	1.08	1.09	1.10	1.11	1.12
Retail trade	1.05	1.07	1.08	1.09	1.10
Health care and social assistance	1.14	1.13	1.10	1.09	1.08
Other services (except public administration)	0.91	0.98	1.01	1.03	1.05
Administrative, support, waste management, and remediation services	0.94	0.92	0.92	0.91	0.91
Construction	0.85	0.88	0.90	0.90	0.89
Arts, entertainment, and recreation	0.81	0.83	0.84	0.85	0.87
Real estate and rental and leasing	0.77	0.78	0.78	0.78	0.79
Transportation and warehousing	0.75	0.74	0.75	0.76	0.76
Manufacturing	0.72	0.71	0.72	0.72	0.72
Professional, scientific, and technical services	0.68	0.68	0.67	0.66	0.66
Wholesale trade	0.58	0.58	0.58	0.58	0.58
Finance and insurance	0.60	0.59	0.57	0.56	0.55
Educational services; private	0.54	0.55	0.54	0.54	0.54
Information	0.53	0.51	0.49	0.48	0.47
Federal Military	0.37	0.36	0.35	0.35	0.34
Management of companies and enterprises	0.28	0.27	0.26	0.26	0.26

Source: Regional Economic Modeling, Inc., PI+, Florida Counties, v3.0

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

Although the logistics and distribution sector is growing in the region, it is still considered under-represented compared to national average employment, as the share of industry employment remains 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, 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 be a growth industry for the region.

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 bio refineries 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



UF Innovate Sid Martin Biotechnology Business Incubator, Alachua

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. 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 UF Innovate 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. Binderholz Live Oak LLC, a wood products manufacturer 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. Greater Gainesville Chamber of Commerce Collaborate 2025 Strategy



Collaborate 2025 is the Greater Gainesville Chamber of Commerce five-year economic development and community strategy designed to create a stronger region and a better life, together. The Strategy focuses on talent, opportunity and place. Quality of life is rooted in economic opportunity and mobility. The goals within Collaborate 2025 are designed to work together to strengthen Greater Gainesville by fostering diverse, well-paying and upwardly mobile opportunities in key sectors, across the spectrum of skills and education.

The opportunity goals of the Strategy focus on promoting economic growth and diversification to create quality jobs for residents of all skill

levels. The talent goals of the Strategy focus on developing, retaining and attracting educated and skilled individuals to build and sustain a world class workforce. The place goals of the Strategy focus on creating a more vibrant, attractive and livable community for all current and future residents.

d. Center for Innovation and Economic Development - Santa Fe College

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.

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 local chambers of commerce and regional workforce development boards.

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

a. Recent Economic Development Investments

i. UF Innovate The Hub

The UF Innovate The Hub 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 UF Innovate The Hub is to provide technology start-ups with the infrastructure, logistics and



UF Innovate The Hub Incubator, Gainesville

resources needed to get up and running effectively and efficiently. In doing so, the UF Innovate The 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, UF Innovate The 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 was 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. UF Innovate The Hub contains office space, wet and dry laboratories, support facilities and community spaces. UF Innovate The 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, Alachua

The 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 promotes 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 Bachelor of Applied Science degree in Clinical Laboratory Sciences.

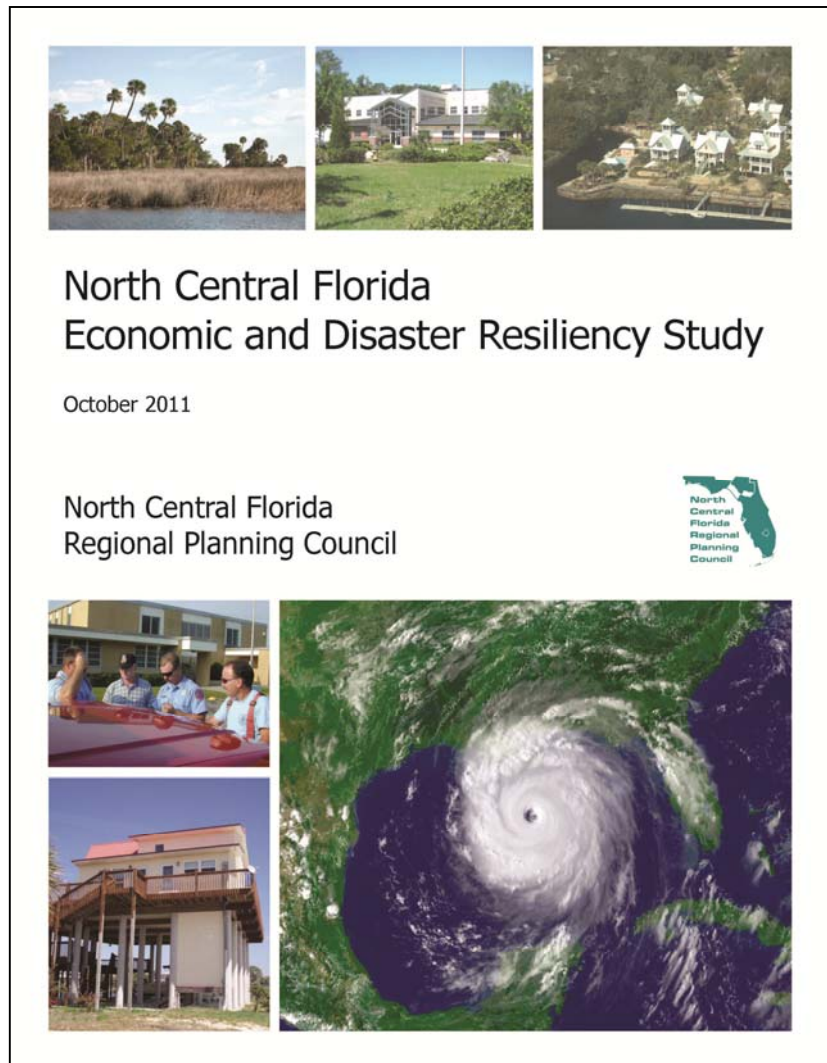
iii. North Central Florida Economic and Disaster Resiliency Study

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 an 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 Master Plan, Gainesville

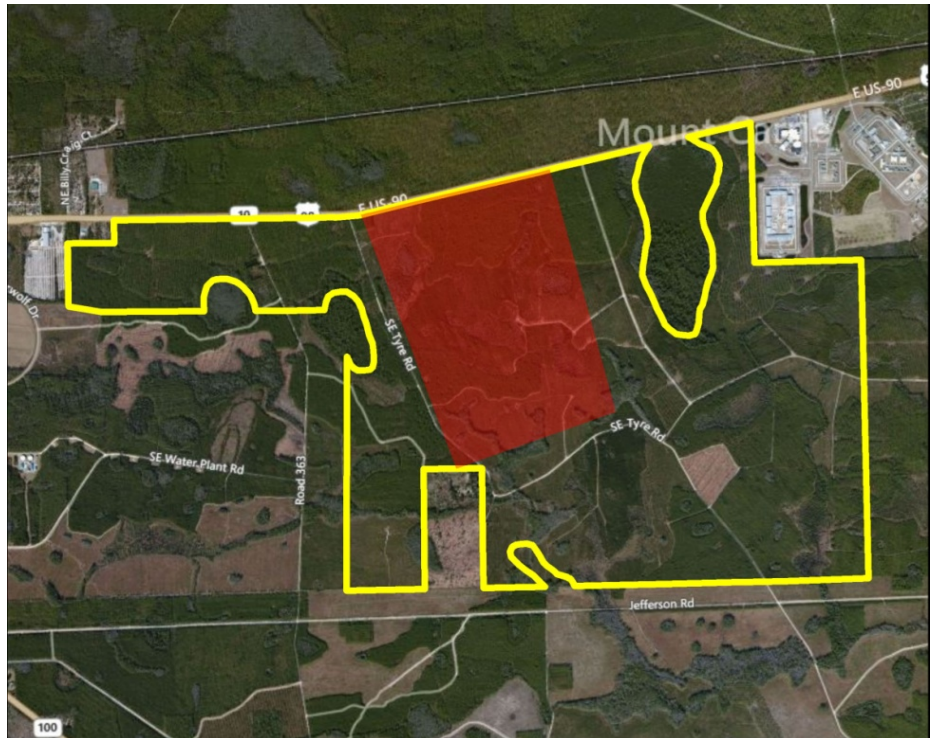
Innovation Square is a 40-acre urban master planned site for a modern innovation-based community in Gainesville. When complete the development will comprise over five million square feet of high-tech offices, research space, urban residences, community retail, boutique hotels and open space that connects 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.

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

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.



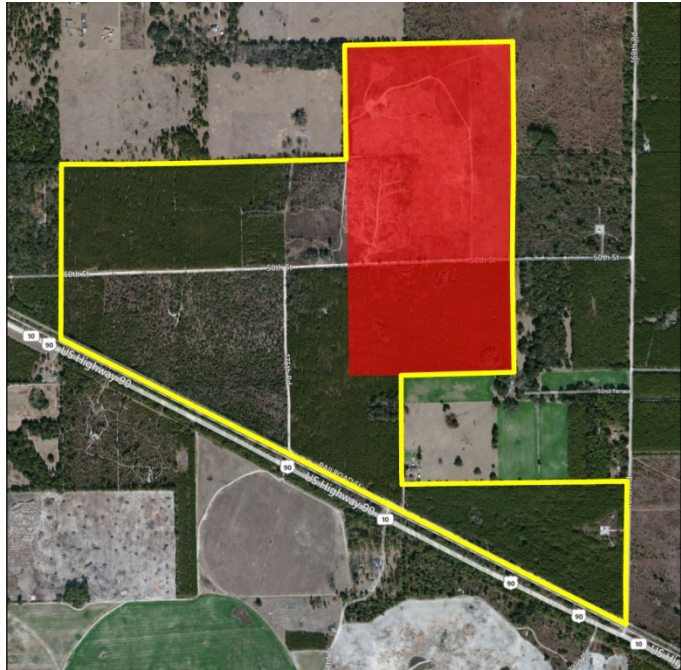
Catalyst Site, Columbia County

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 has also been completed for economic development projects.



Catalyst Site, Suwannee County

iv. Florida Energy Resiliency Strategy



Solar Farm, Suwannee County

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. **City of Gainesville Economic Development Initiatives**

Santa Fe College manages the City of Gainesville-owned 30,000 square foot Gainesville Technology Entrepreneurship Center located in East Gainesville. The vision for the Center repositions the Center within the local innovation community and among the other existing incubators (UF Innovate Hub, Santa Fe College Center for Innovation and Economic Development and UF Innovate 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.



Gainesville Technology Entrepreneurship Center

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. U.S. Economic Development Administration 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

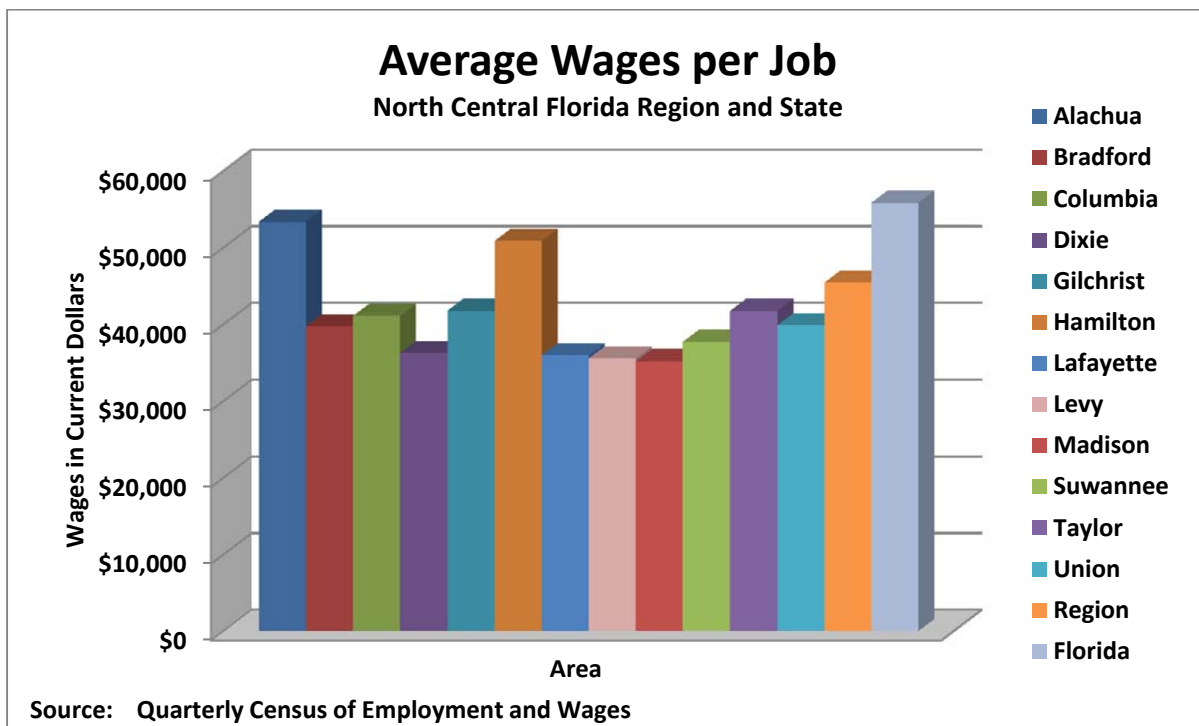
1. Talent Supply & Education

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 2020, overall average wages per job across the region were slightly more than \$10,000 short of state average wages.

Illustration C-1

Average Annual Wages per Job
North Central Florida Region and State
Current Dollars
2020

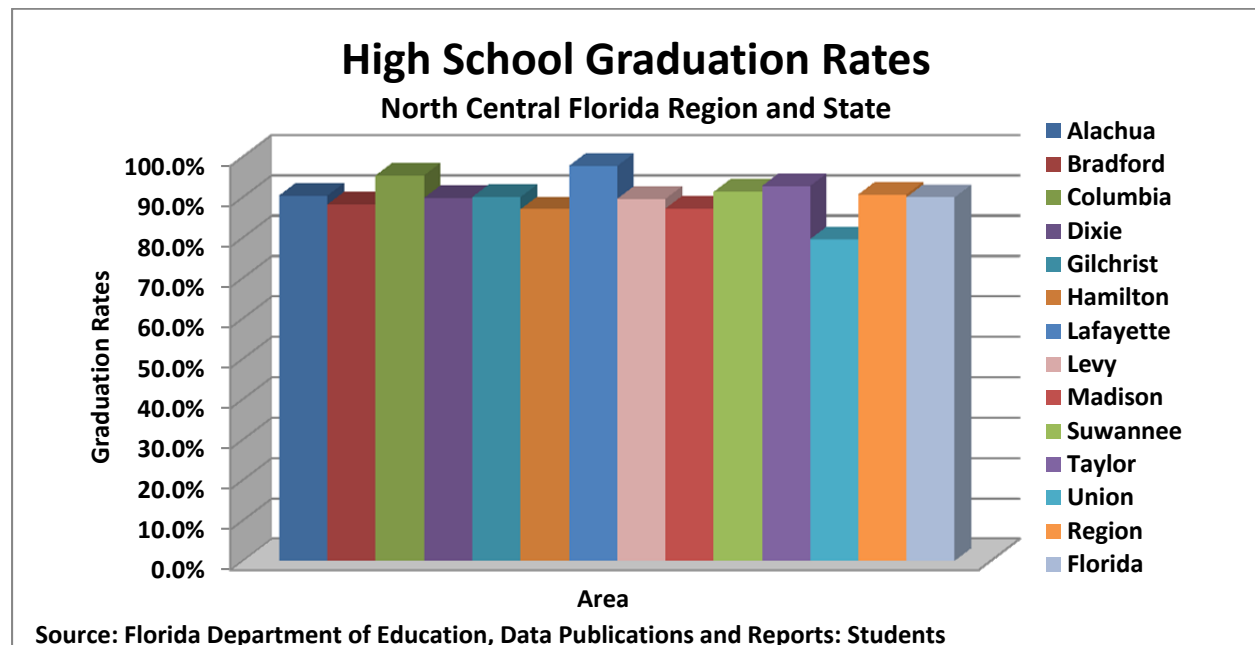


b. High School Graduation Rates

As shown in Illustration C-2, during the 2019-20 school year the high school graduation rate for the region was slightly higher than the state rate. Six counties, Alachua, Columbia, Gilchrist, Lafayette, Suwannee and Taylor have high school graduation rates higher than that of the state, while the remaining six counties were below the state rate.

Illustration C-2

High School Graduation Rates North Central Florida Region and State School Year 2019-20

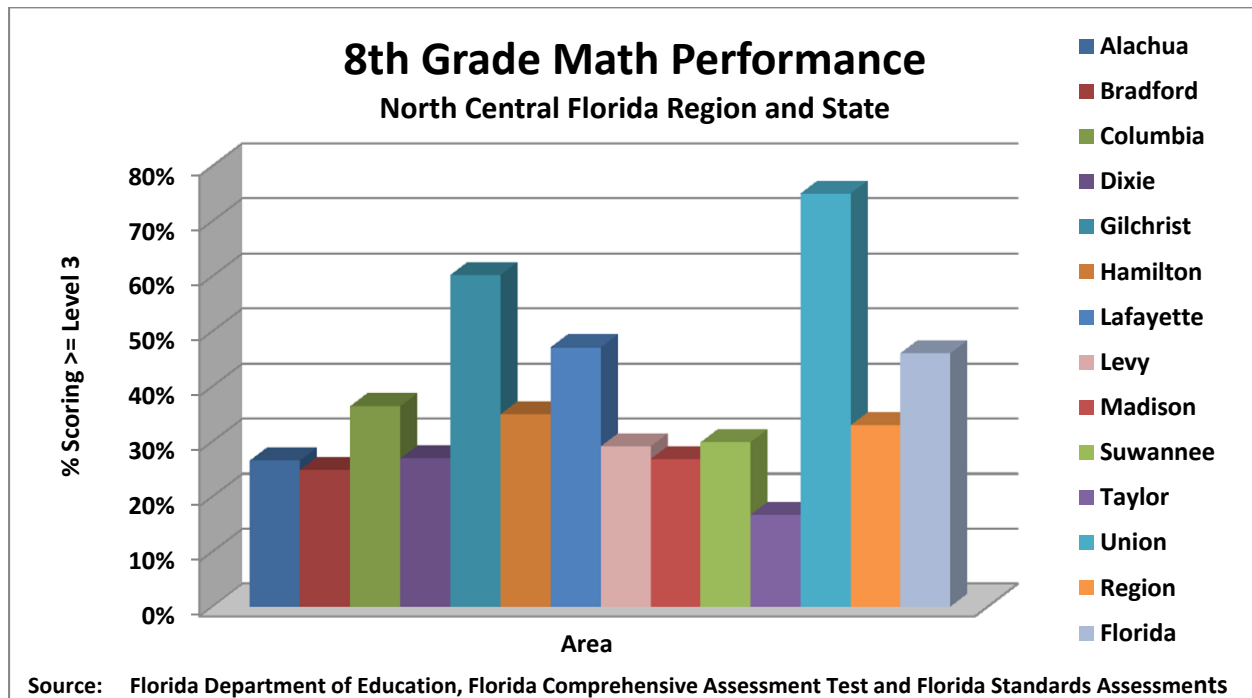


c. 8th Grade Math Performance

As shown in Illustration C-3, in 2015, the 8th grade math performance on the Florida Comprehensive Assessment Test and Florida Standards Assessments of the region lagged behind that of the state. However, Gilchrist, Lafayette and Union Counties exceeded state averages for this measure.

Illustration C-3

**8th Grade Math Performance on the Florida Comprehensive Assessment Test
Percent Scoring \geq Level 3 of 5
North Central Florida Region and State
2020**



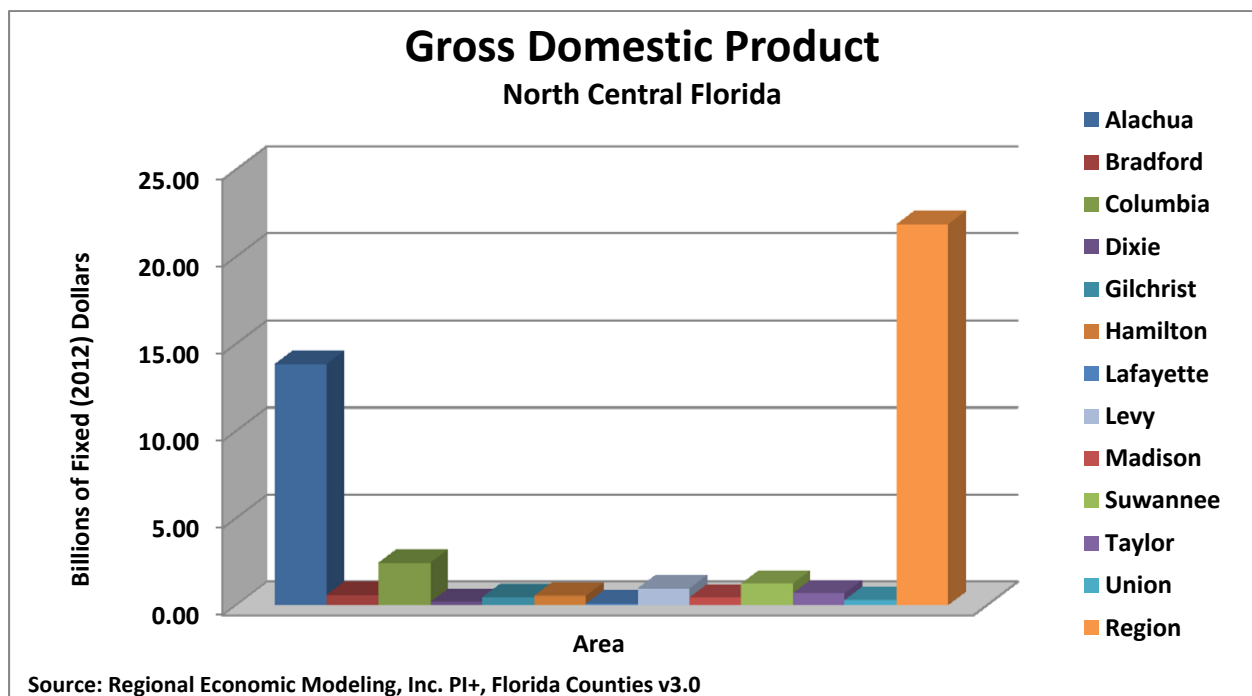
2. Innovation & Economic Development

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 2012 Dollars
2020**

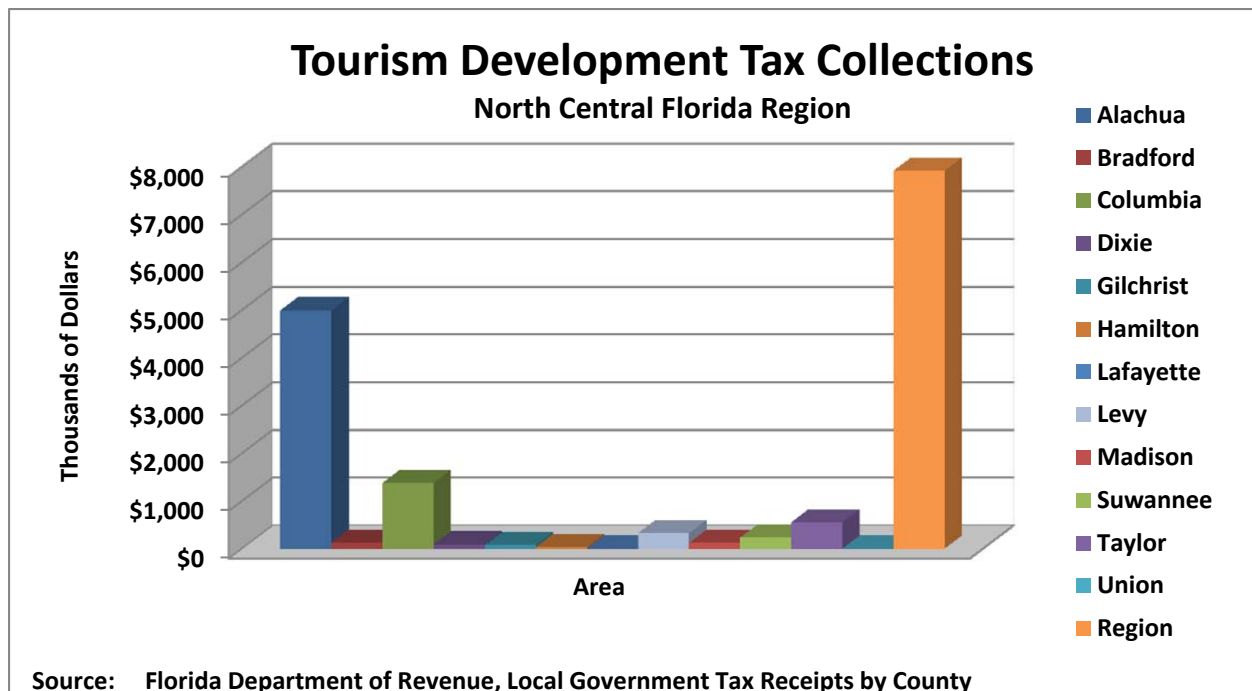


b. Bed Tax Collections

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 2019-20**



c. Trade Exports and Imports

Illustration C-6a shows that Alachua County accounts for 47 percent of all exported goods and services from the region, followed by Columbia County with 13 percent. This is primarily due to the higher concentration of population and businesses located in the urbanized areas of Alachua County.

Illustration C-6a

Trade Exports
North Central Florida Region
Billions of Fixed 2012 Dollars
2020

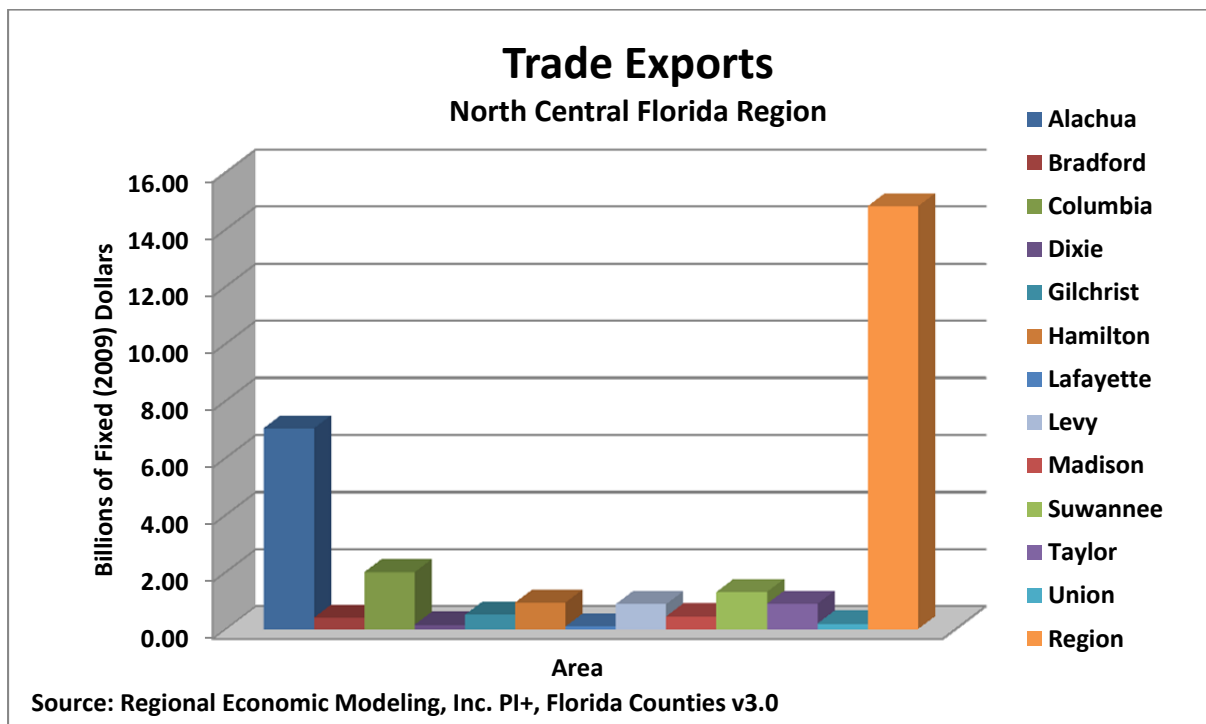
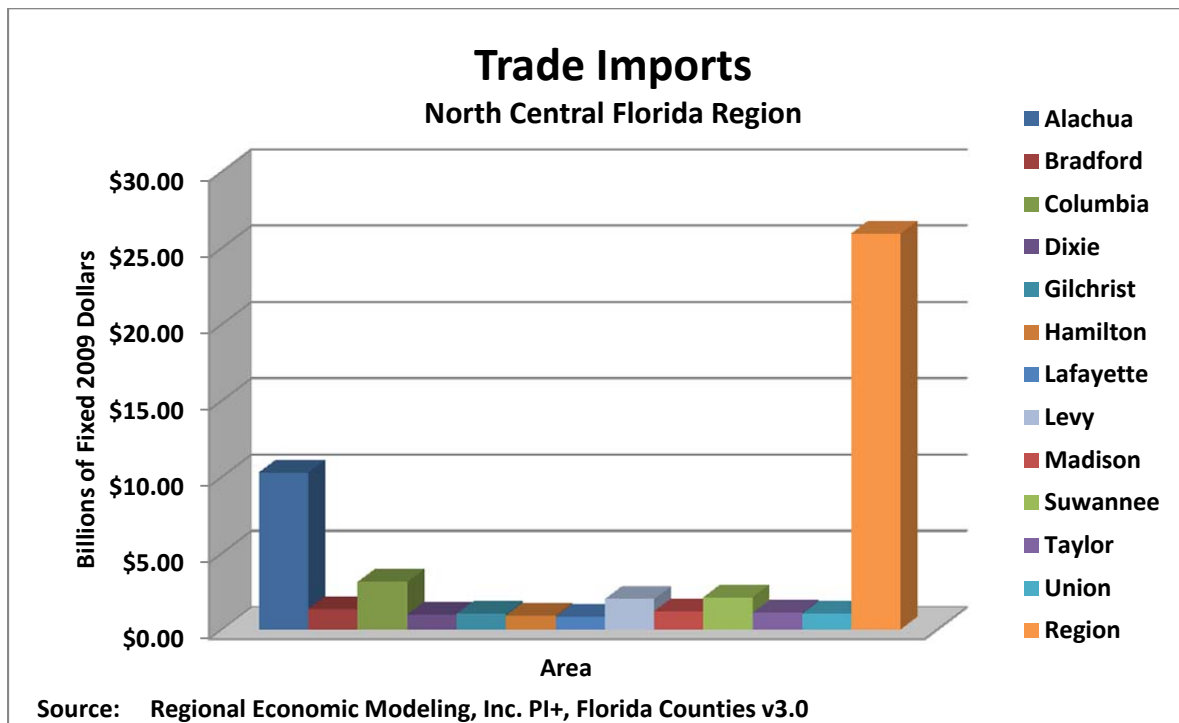


Illustration C-6b shows that Alachua and Columbia Counties are the two largest importers of goods and services in the region, accounting for 40 percent and 12 percent respectively. In 2020, the region imported \$11.1 billion more than it exported, meaning that the region as a whole is a net importer 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 2012 Dollars 2020



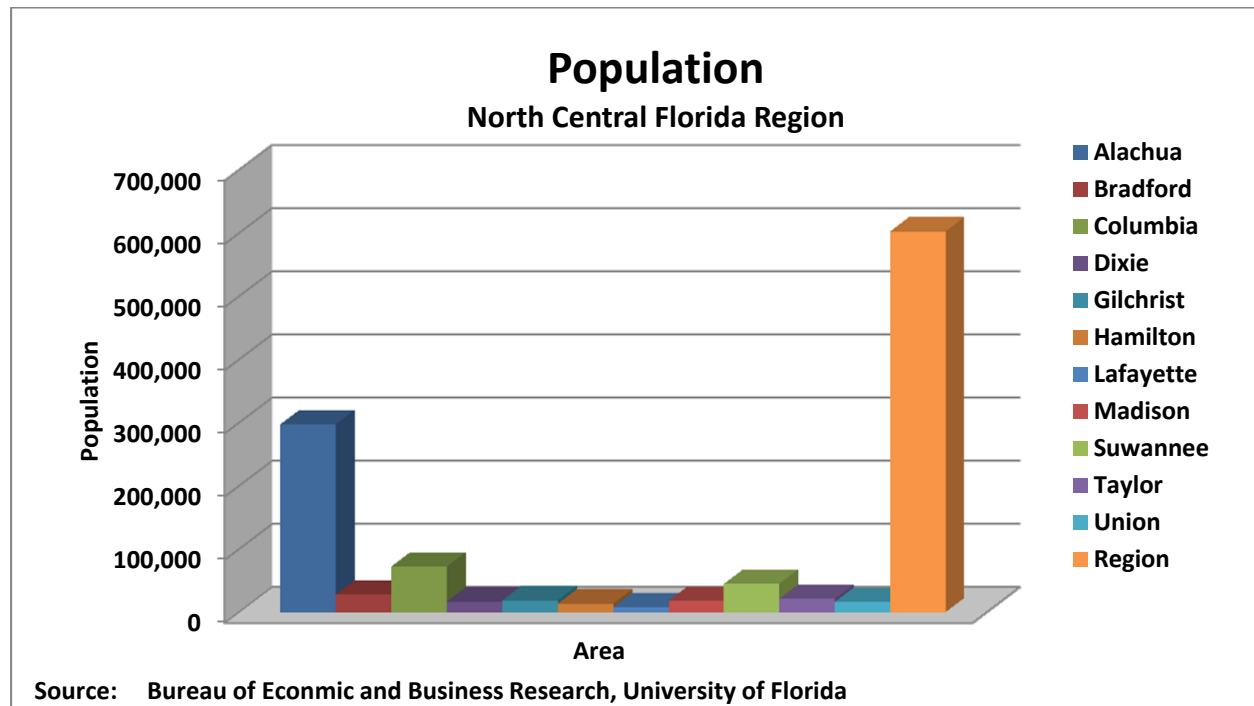
3. Infrastructure & Growth Leadership

a. Population Counts, Estimates and Projections

Illustration C-7 shows that in 2020, the region had just over 575,000 residents, and that 48 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 2020

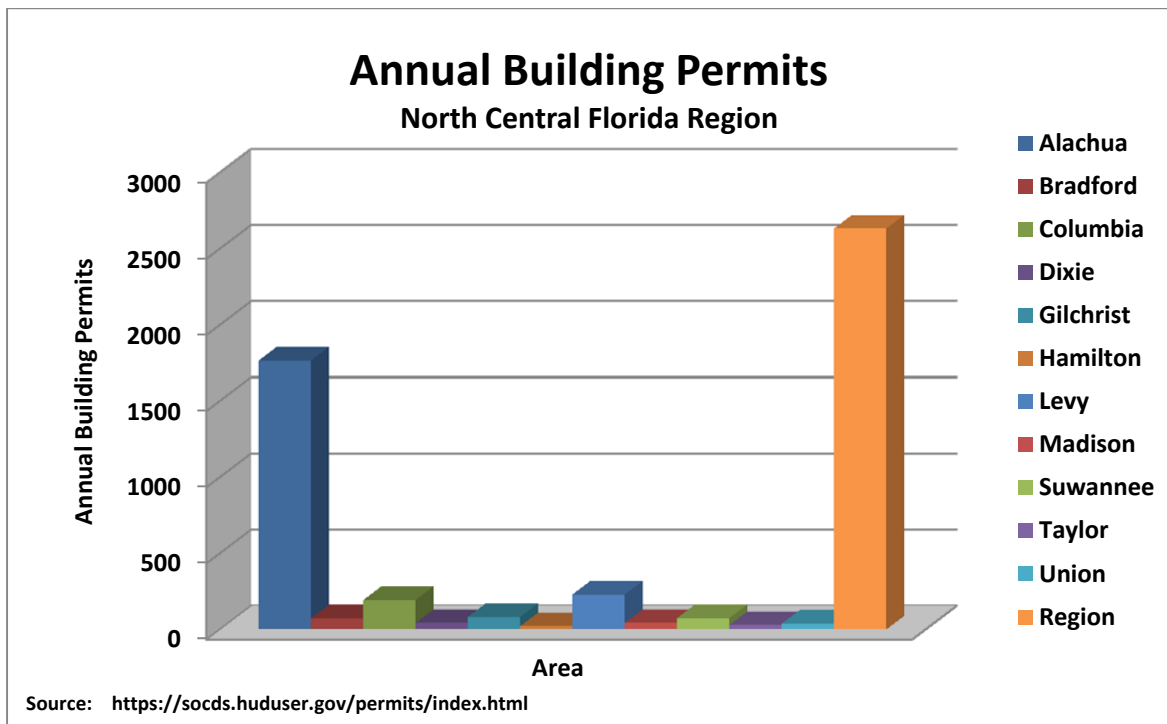


b. Building Permits

Illustration C-8 shows that in 2020, two-thirds of new residential construction activity in the region was centered in Alachua County. In 2020, the number of permits for new housing in the region as a whole is nearly four times the number of permits issued in 2011.

Illustration C-8

**Annual Building Permits
North Central Florida Region
Residential Units
2020**

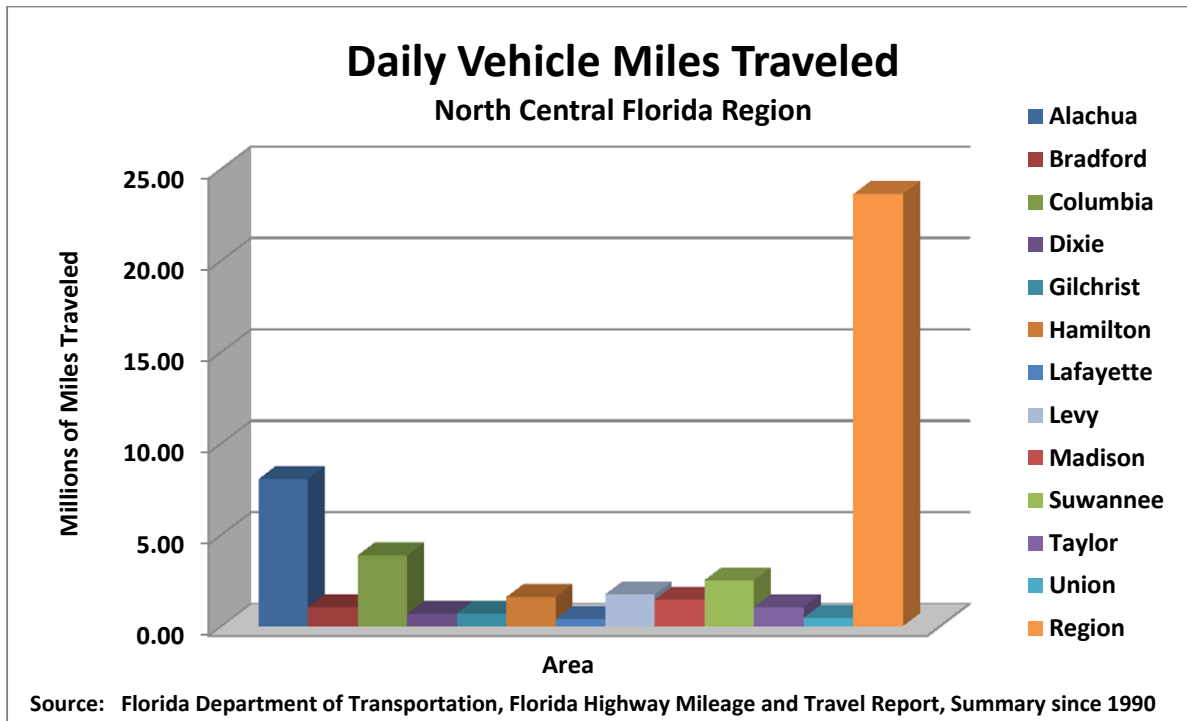


c. Vehicle Miles Traveled

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
2020**



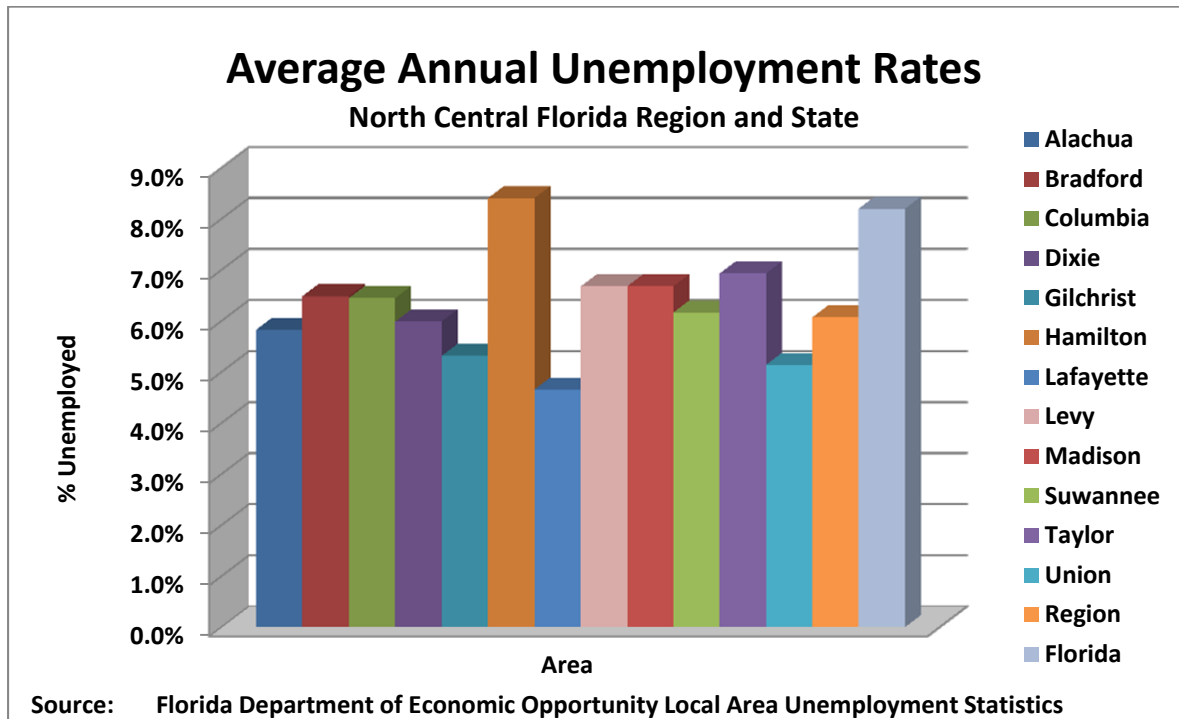
4. Business Climate & Competitiveness

a. Average Annual Unemployment Rates

Illustration C-10 shows the average unemployment rate for the region and state. In 2020, average annual unemployment in the counties within the region ranged from a low of 4.7 percent in Lafayette County to a high of 8.4 percent in Hamilton County. Overall, the regional annual unemployment rate of 6.1 percent was slightly more than the 5.4 percent state rate.

Illustration C-10

Average Annual Unemployment Rates North Central Florida Region and State 2020



b. Employment by Industry

Illustration C-11a

Employment by Industry
North Central Florida Region
2020

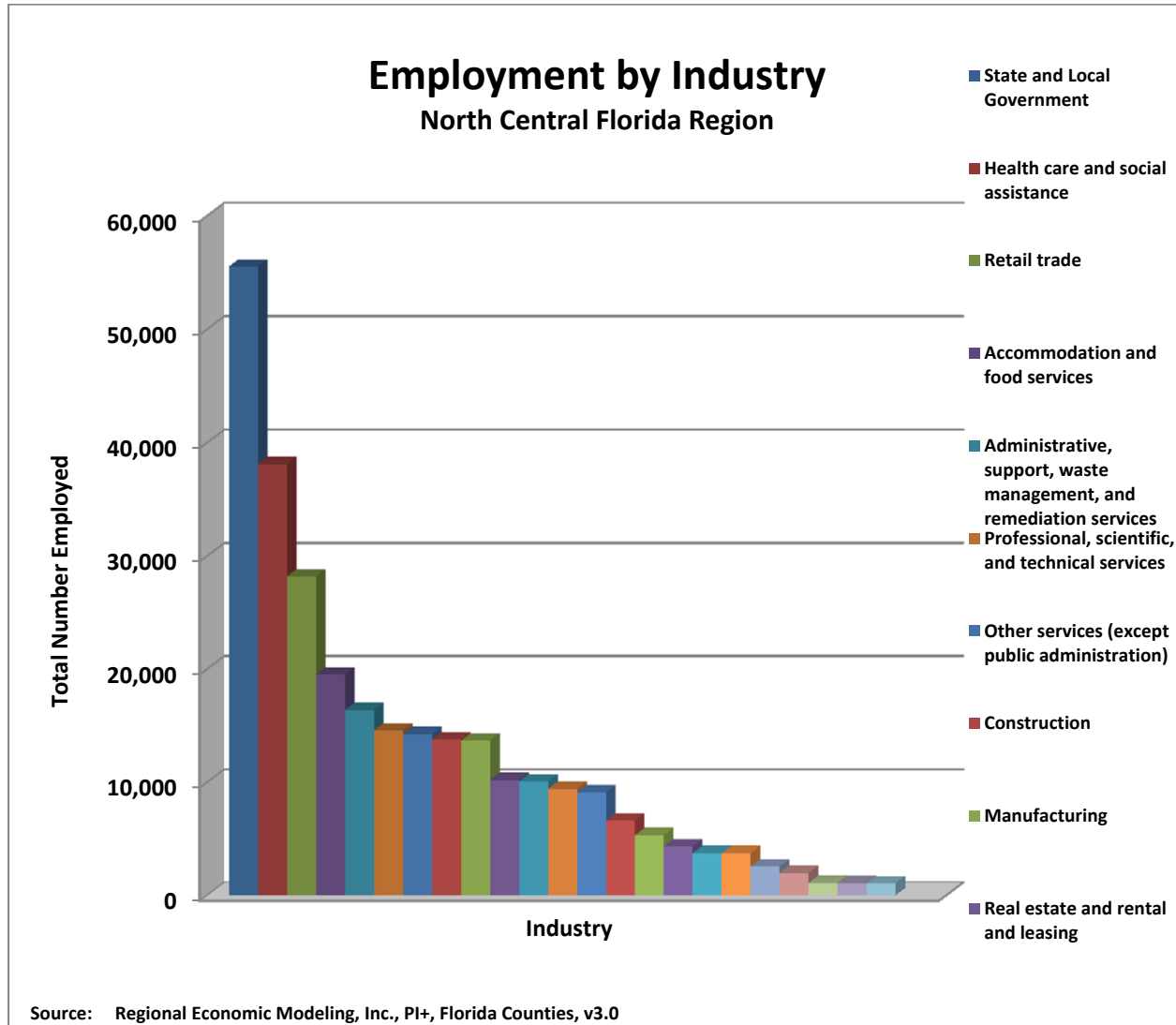
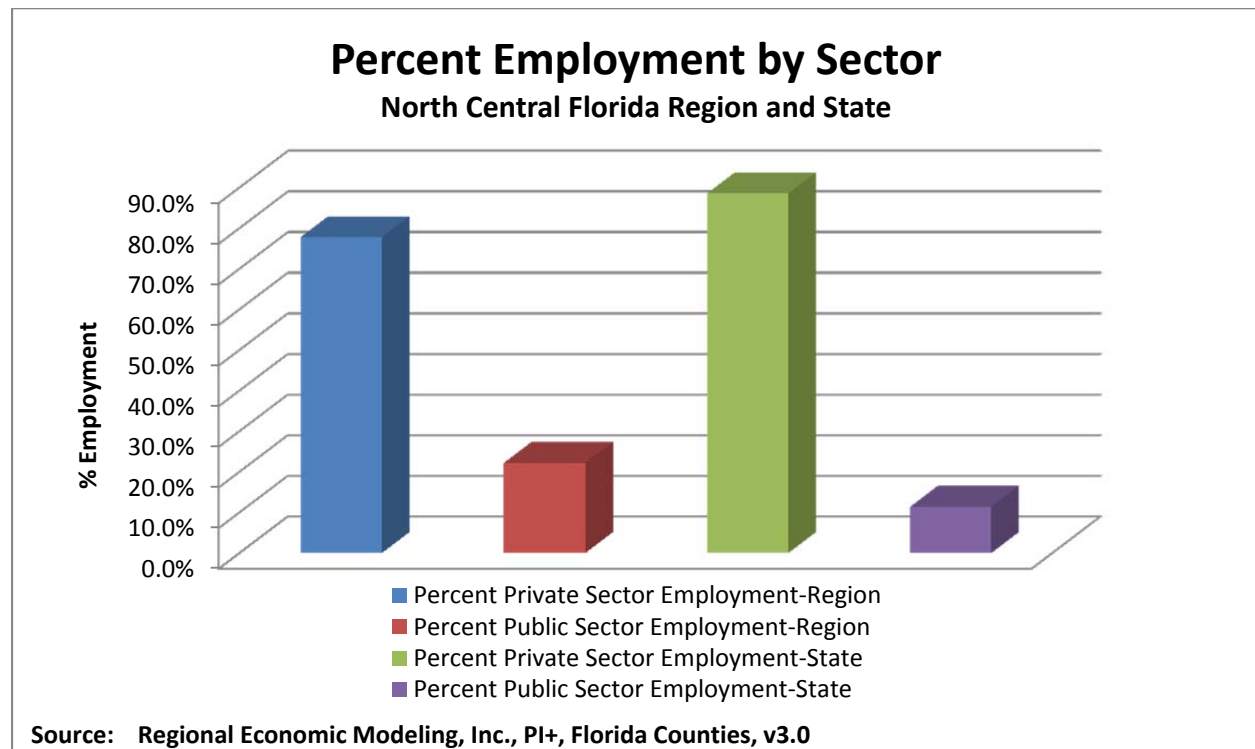


Illustration C-11a above shows that in 2020, the top five employment industries in the region were State and Local Government, Health Care and Social Assistance, Retail Trade, Accommodation and Food Services, and Professional, Scientific and Technical Services. These five industries represent 59.9 percent of total employment in the region.

Illustration C-11b shows percent employment by sector. In 2020, 75.8 percent were employed in the private sector, as opposed to 24.2 percent in the public sector, which is more than double the overall state employment in the public sector of 10.3 percent. The variance in employment patterns is due to a high concentration of state educational employees, as well as state prison employees in the region.

Illustration C-11b

Percent Employment by Sector North Central Florida Region and State 2020



c. Wages by Industry

Illustration C-12a

Average Annual Wages by Industry
North Central Florida Region
Thousands of Current Dollars
2020

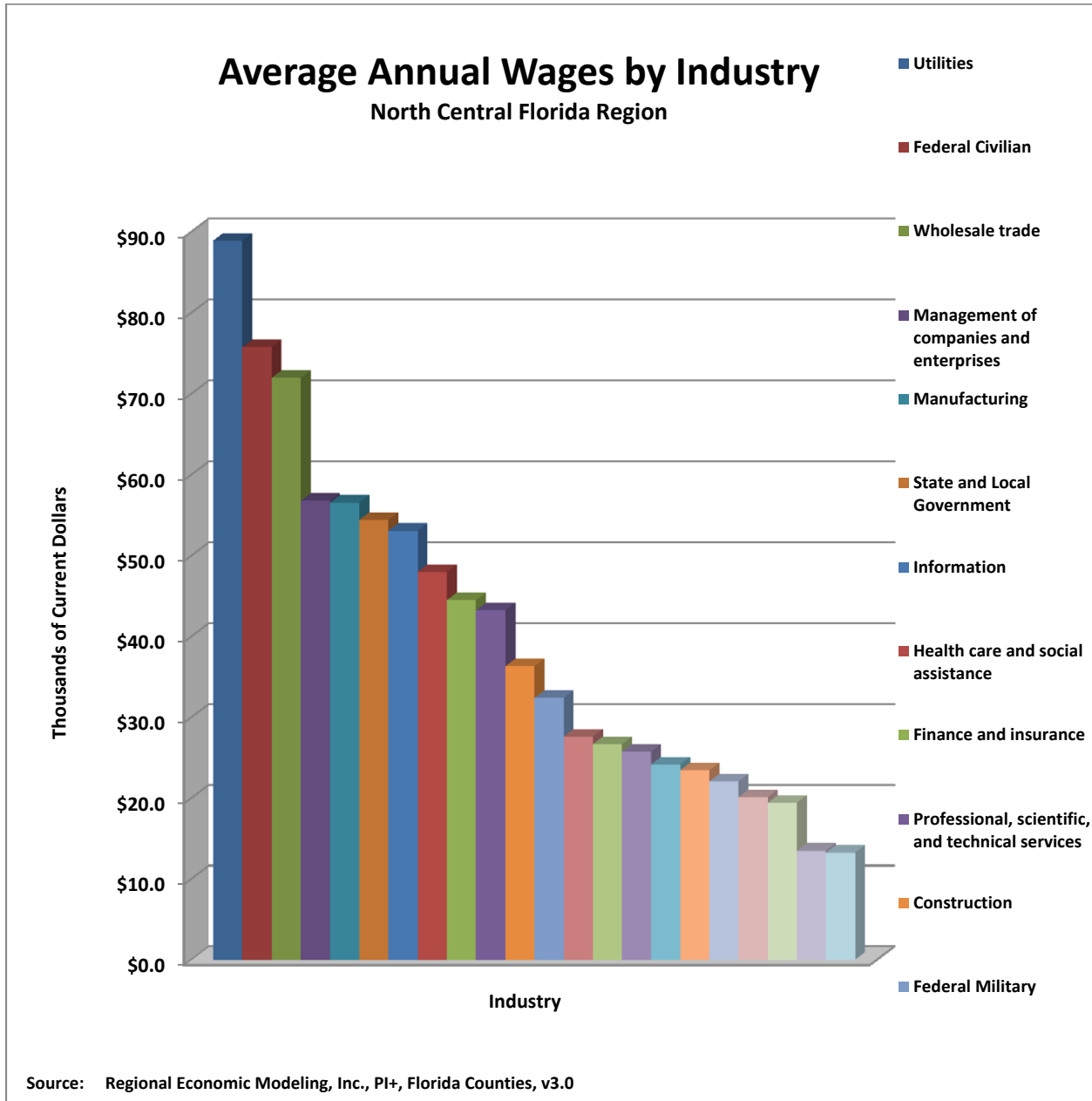
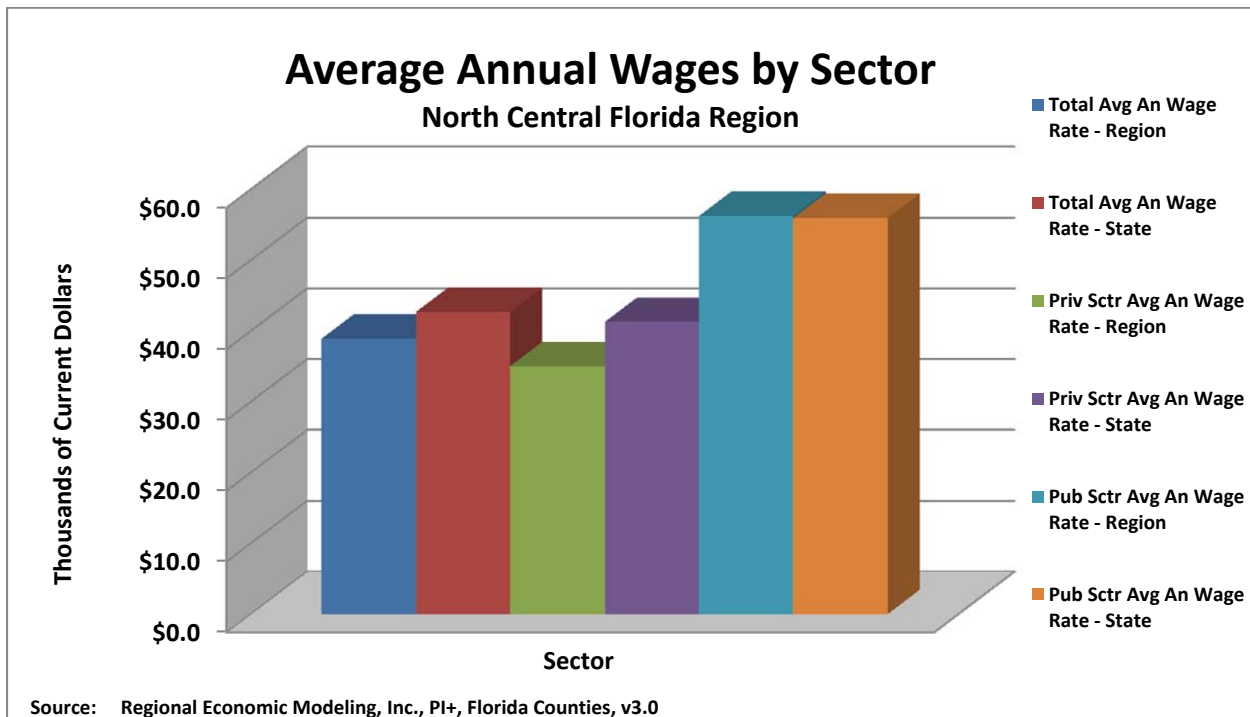


Illustration C-12a above shows that in 2020, the Utilities and Federal Civilian Government employment categories paid substantially higher wages than any other category of employment. The difference between those two employment categories and all others can be attributed to the higher and more specialized educational requirements for employment in those fields.

Illustration C-12b shows that, in 2020, in the private sector, regional average annual wages lag behind those of the state. However, in the public sector, average annual wages in the region exceed those of the state. Regional average wages were 15.0 percent less than state average wages in the private sector, while regional public sector average annual wages were 0.5 percent above state averages.

Illustration C-12b

Average Annual Wages by Sector North Central Florida Region Thousands of Current Dollars 2020



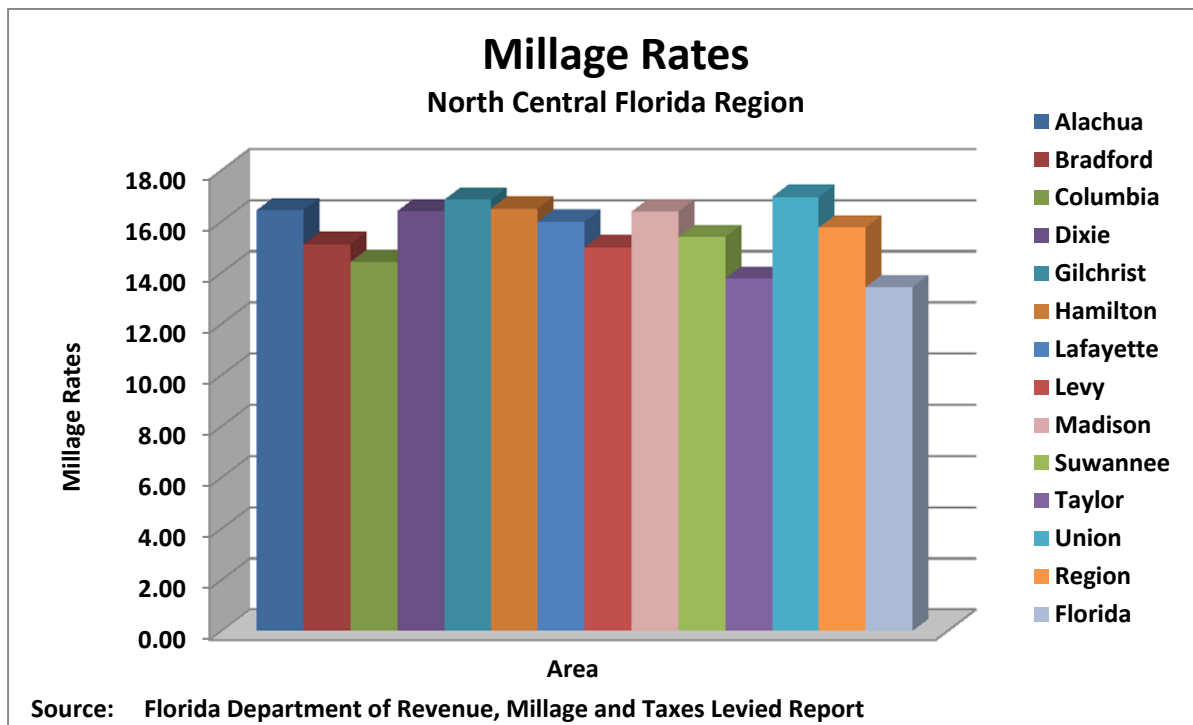
5. Civic & Governance Systems

a. Millage Rates

Illustration C-13 shows that in 2020, 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 2020

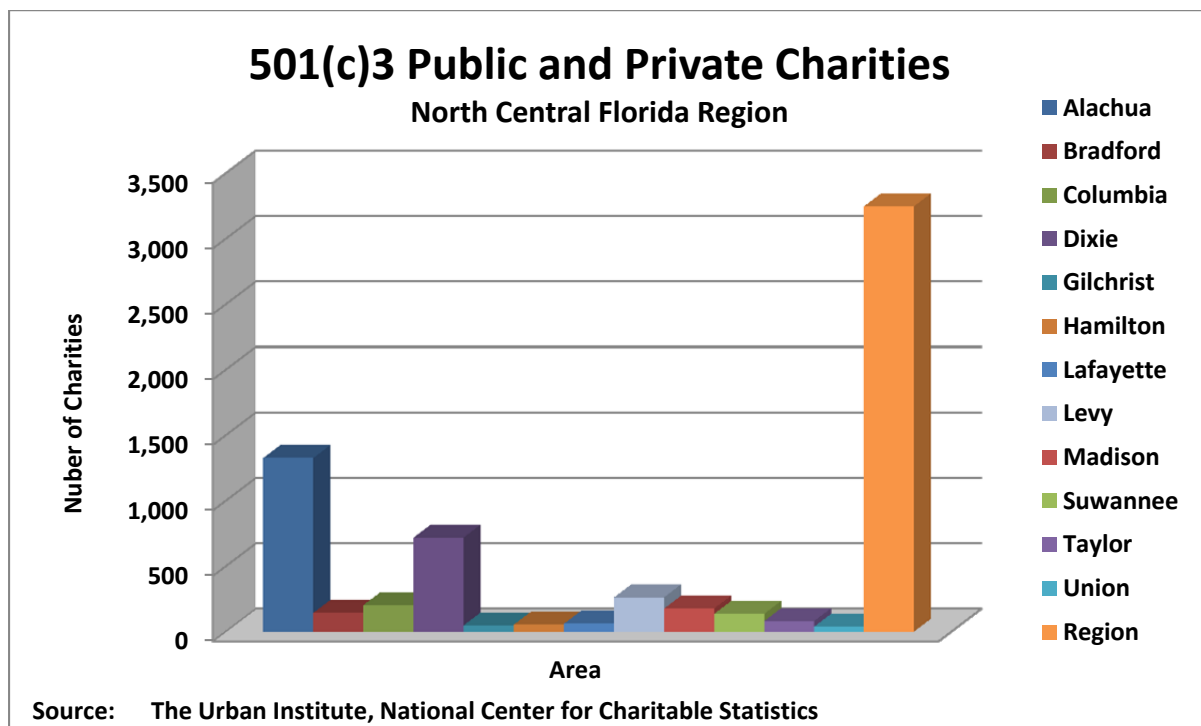


b. Registered Nonprofit Organizations

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`



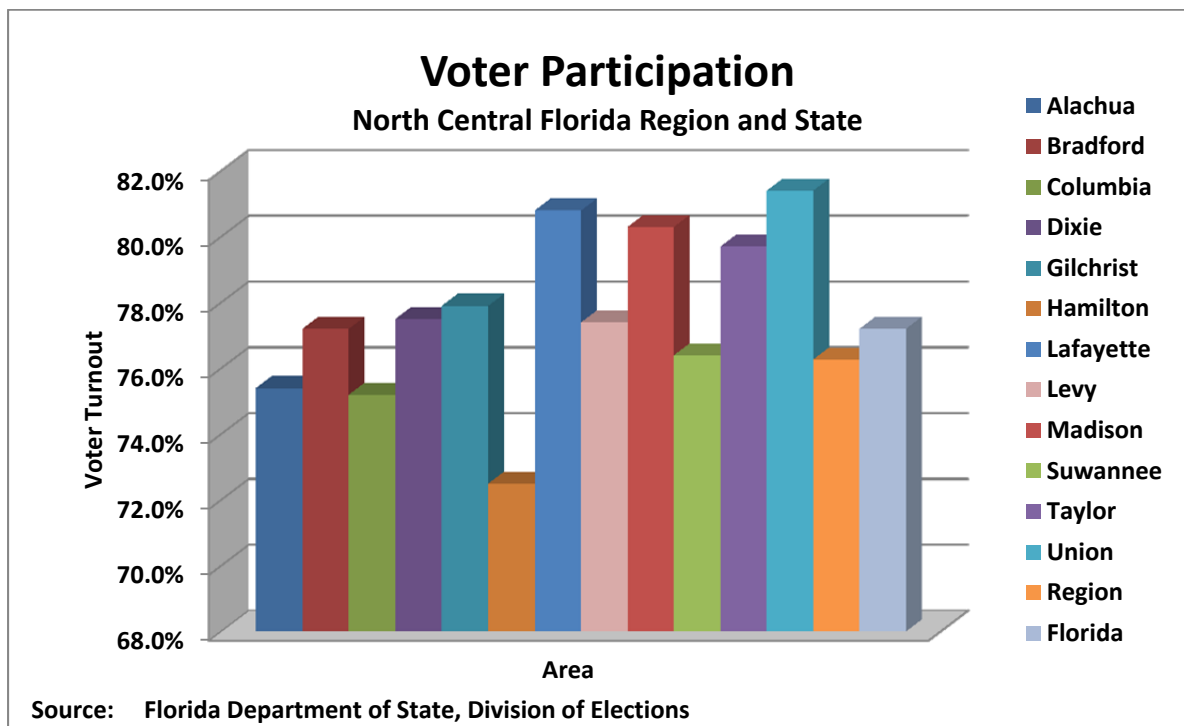
Note: Data for registered 501(c)3 organizations public and private foundation charities are longer available at the county level.

c. Voter Participation

Illustration C-15 shows that in the 2020, 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 81.4 percent in Union County to a low of 72.5 percent in Hamilton County.

Illustration C-15

**Voter Participation
North Central Florida Region and State
Biennial General Elections
2020**



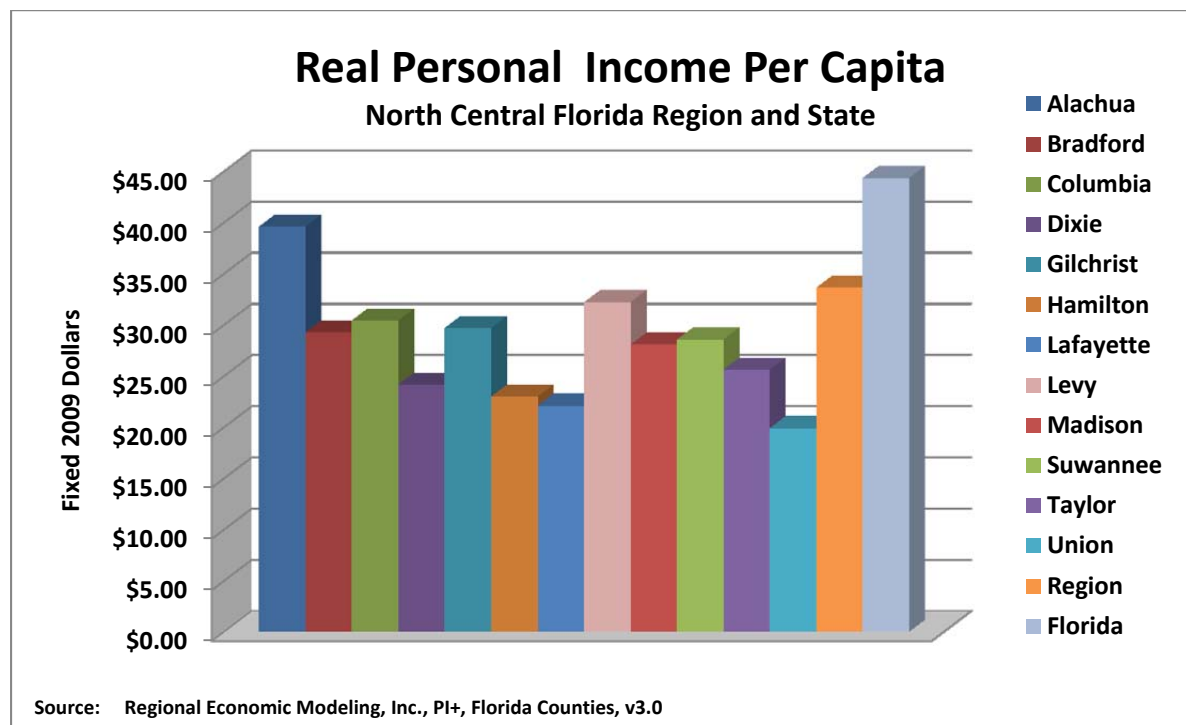
6. Quality of Life & Quality Places

a. Per Capita Income

Illustration C-16 shows that in 2020, 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 24 percent less than the state per capita income, Lafayette County and Union County had less than one-half the state average per capita income.

Illustration C-16

**Real Personal Per Capita Income
North Central Florida Region and State
Fixed 2012 Dollars
2020**

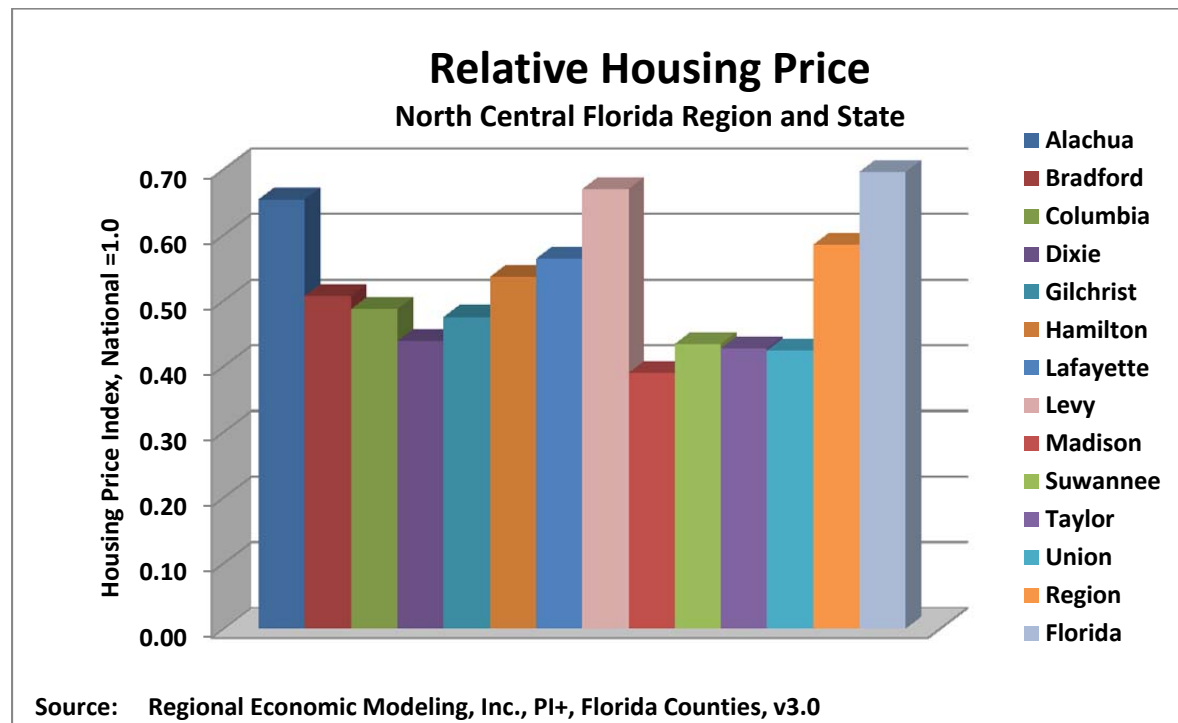


b. House Purchase Price and Cost Index

Illustration C-17 shows that in 2020, housing in the region remained affordable relative to state and national averages. None of the counties in the region 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
2020**

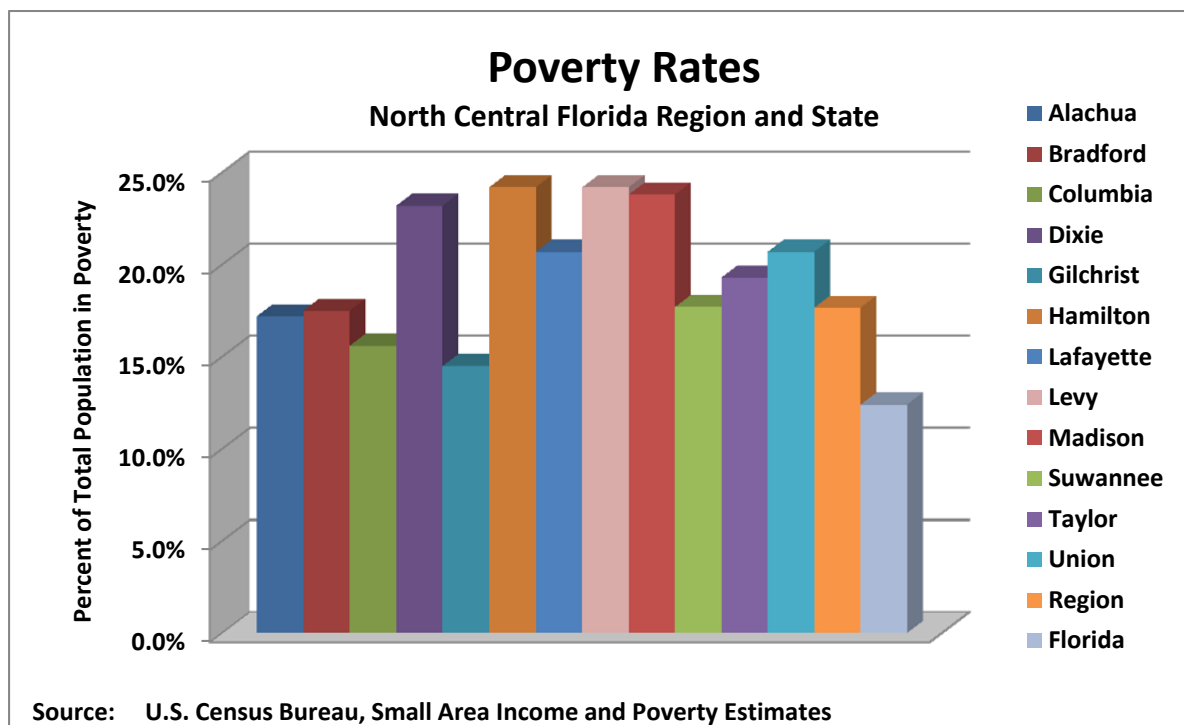


c. Persons Living in Poverty

Illustration C-18 shows that in 2020, poverty rates across the region exceeded the state poverty rate. As a whole, the regional poverty rate exceeded the state rate by 5.3 percent, while Hamilton County, with the highest poverty rate in the region at 24.2 percent, was nearly double the state rate of 12.4 percent.

Illustration C-18

Percent of Persons Living in Poverty North Central Florida Region and State 2020



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 economic development, local government 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 2023-2027 Comprehensive Economic Development Strategy are, as follows:

* Landon Harrar, Business Development Coordinator, Greater Gainesville Chamber of Commerce

Diane Head, Executive Director, CareerSource North Florida

Jeffrey Hendry, Executive Director, North Florida Economic Development Partnership

Chadd Mathis, Executive Director, Hamilton County Development Authority

** Jimmy Norris, Director, Suwannee County Economic Development

Sherilyn Pickels, County Manager, Madison County

Pamela Whittle, Executive Director, Bradford County Development Authority

Chair

* * Vice-Chair

North Central Florida Regional Planning Council

Comprehensive Economic Development Strategy Team

Scott R. Koons, AICP, Executive Director

- * Lauten Yeatter, AICP, Senior Planner
- ** Kevin D. Parrish, Information Technology and Property Management Director
- ** Tara Tucker, Executive Assistant to the Executive Director

- * Primary Responsibility
 - ** Secondary Responsibility
-



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