

2014 East Central Florida Comprehensive Economic Development Strategy



This report was prepared by the East Central Florida Regional Planning Council under award number 048306904 from the U.S. Economic Development Administration, U.S. Department of Commerce

"By leveraging resources across the Federal government and building on regional strengths, we'll improve business opportunities, enhance our nation's global economic competitiveness and create sustainable, 21st century jobs."

- Gary Locke, Former Secretary of Commerce



*Breakbulk cargo vessel
Port Canaveral, Florida*



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East Central Florida Regional Planning Council

Resolution #04-2014

*Support of the 2014 East Central Florida
Comprehensive Economic Development Strategy (CEDS)*

By the East Central Florida Regional Planning Council (ECFRPC)

WHEREAS, the ECFRPC is a Florida Regional Planning Council mandated by FS 186.504 and in existence since 1962; and

WHEREAS, the ECFRPC serves the East Central Florida Region and its six counties of Brevard, Orange, Osceola, Lake, Seminole and Volusia; and

WHEREAS, the East Central Florida Region was designated as an Economic Development District (EDD) by the U.S. Economic Development Administration (EDA) in May 2005; and

WHEREAS, the ECFRPC has prepared the 2014 Comprehensive Economic Development Strategy (CEDS), for the East Central Florida Economic Development District; and

WHEREAS, the CEDS contains updated analysis, demographic data, economic data, economic development projects, and goals and objectives for the betterment of the region; and

WHEREAS, the availability of an approved CEDS and related annual updates are a condition for qualifying for grants for local economic development projects from the Economic Development Administration of the U.S. Department of Commerce

NOW, THEREFORE, the East Central Florida Regional Planning Council, on September 17, 2014 hereby accepts and recommends approval to the U.S. EDA the 2014 East Central Florida Comprehensive Economic Development Strategy (CEDS).

Attest:

EAST CENTRAL FLORIDA
REGIONAL PLANNING COUNCIL:

Chuck Nelson
Chair, ECFRPC

Hugh W. Harling, Jr.
Executive Director

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BACKGROUND

What is a Comprehensive Economic Development Strategy?

A Comprehensive Economic Development Strategy is designed to bring together the public and private sectors to create an economic roadmap to diversify the region's economy. The CEDS should:

- Analyze the regional economy
- Serve as a guide for establishing regional goals and objectives
- Develop and implement a regional plan of action
- Identify investment priorities and funding sources

The CEDS also:

- Integrates a region's human and physical capital planning in the service of economic development
- Provides the flexibility to adapt the region to global economic conditions by fully utilizing its unique advantages to maximize economic opportunity for its residents by attracting the private investment that creates jobs for the region's residents
- Results from a continuing economic development planning process with broad-based and diverse public and private sector participation
- Sets forth the goals and objectives necessary to solve the economic development problems of the region

Finally, a CEDS provides a useful benchmark by which a regional economy can evaluate opportunities with other regions in the national economy (Source: U.S. Department of Commerce, Economic Development Administration).

CEDS Strategy Committee

A Strategy Committee was established to assist in the development and review of the CEDS and to offer advice and counsel to the Project Team. This Committee is comprised of the major economic partners of the region, including private and public sector representatives, public officials, community leaders and representatives of institutions of higher education, minority groups, and private individuals.

CEDS Project Team

EDA established the East Central Florida Region as the official Economic Development District in 2006 . The CEDS Project Team includes members of the East Central Florida Regional Planning Council (ECFRPC) staff, which oversees the management and implementation of the CEDS.

GEOGRAPHY

The East Central Florida Economic Development District (EDD) is comprised of the planning area of the East Central Florida Regional Planning Council. This includes the six counties of Brevard, Lake, Orange, Osceola, Seminole and Volusia and the 68 cities within these counties.

ECONOMY

BREVARD COUNTY

Brevard County is more than just 72 miles of Atlantic Ocean beaches. Also known as Florida's Space Coast, Brevard has the most concentrated high-tech economy in the state of Florida and the 16th most concentrated in the nation (Space Coast EDC, 2012).

The United States' gateway to space exploration, NASA's John F. Kennedy Space Center (KSC), is located here, along with several aerospace companies such as Craig Technologies, Lockheed Martin, and Northrop Grumman. Melbourne-based Harris Corporation is an international communications and information technology company serving government and commercial markets in more than 150 countries. Harris Corporation has approximately \$5.5 billion of annual revenue and employs about 15,000 people- including over 6,000 engineers and scientists.

Port Canaveral is the world's second busiest cruise port, the base for many cruise ships, cargo vessels, U.S. Navy ships and the Navy's Trident Missile submarine force. In FY 2012, the number of passengers reached 3.76 million.

Brevard County is also home to the Florida Solar Energy Center (FSEC). FSEC was created by the Florida Legislature in 1975 to serve as the state's solar and energy research institute. The 20-acre research complex on Florida's Space Coast is adjacent to the University of Central Florida's Cocoa Campus.

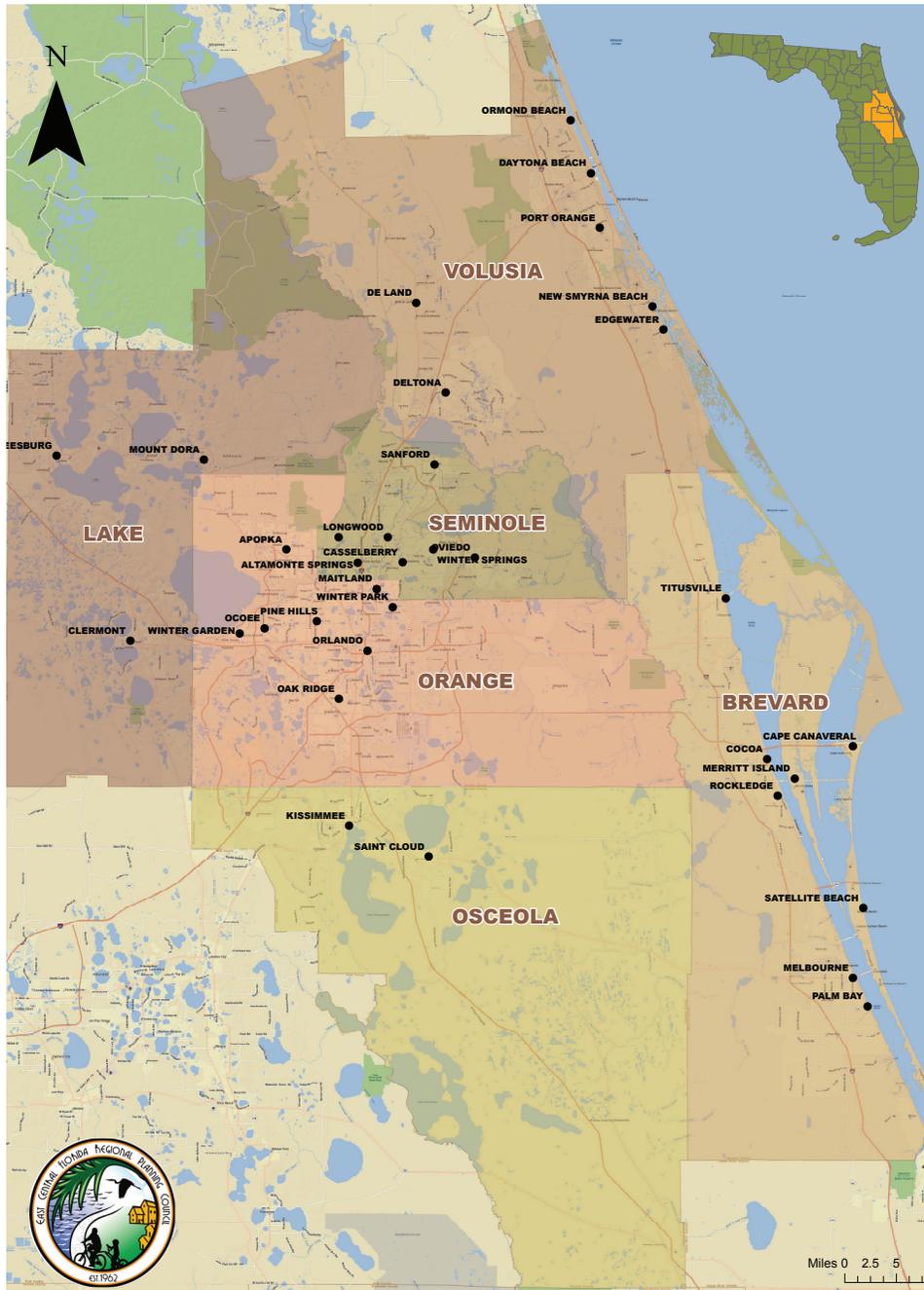


Figure 1: East Central Florida Economic Development District

Table 1: Brevard County Major Employers (by # of employees)

Employer	Employees
Harris Corporation - GCSD	6,300
Health First	6,300
United Space Alliance LLC	5,100
HMA	2,500
National Aeronautics/Space Admin.	2,300
Northrop Grumman Corporation	1,400
Rockwell Collins INC	1,300
Florida Institute of Technology	1,200
Raytheon	1,100
Lockheed Martin	1,000

Source: Florida's Space Coast EDC, March 2011



Figure 2: Orange County Convention Center Rooftop (UCF Today)

“Funded by the Department of Energy’s Solar America initiative, researchers at UCF’s Florida Solar Energy Center helped design and are monitoring the Southeast’s largest rooftop solar photovoltaic system. Situated on top of the Orange County Convention Center, the system generates 1,300 to 1,400 megawatt hours of electricity per year – an amount equivalent to the power used by 100 homes – without producing greenhouse gas emissions. This unique system was built in part with a \$2.5-million grant from the state of Florida.” Source: UCF Today

The August 2011 termination of NASA’s Space Shuttle Program is a significant economic threat to Florida’s Space Coast region. Brevard County has lost 19,600 (direct and indirect) jobs and will continue to lose more employees as the program continues to transition (Florida’s Space Coast EDC). The region must continue working together to develop strategies to retain displaced aerospace workers by investing in innovation clusters and promoting a cohesive network of economic activity. Highly skilled, high wage employees are important to stimulating the economy and taking the East Central Florida Region into the 21st Century economy.

LAKE COUNTY

Key economic assets in Lake County include Lake Technical Center, Lake-Sumter Community College, and Christopher C. Ford Commerce Park (more than 700 acres have been sold in the park.) The University of Central Florida, Troy State University, and St. Leo University provide higher education for an increasingly skilled workforce.

Table 2: Lake County Major Employers (excluding retail and schools)

Employer	Employees
Leesburg Regional Medical Center	3,000
Florida Hospital Waterman	1,500
South Lake Hospital	1,870
Cornerstone Hospice	600
Lifestream Behavioral Center	600
Lake County Sheriff’s Office	525
Accent	500
Lake County Commissioners	450
A-1 Septic Tank SVC	425
State Corrections Department	420

ORANGE COUNTY

Orange County is the region’s most populous county and home to the City of Orlando and twelve other incorporated cities. The county sits in the approximate center of the state, midway between Jacksonville and Miami. Two of the state’s major highways, Interstate 4 (east-west) and the Florida Turnpike (north-south), intersect the County. Orange County’s quality of life continues to attract new residents and businesses. According to estimates from the University of Florida’s Bureau of Economic and Business Research (BEBR), Orange County was home to 1,175,766 people in 2012, of which sixty-four percent resided in unincorporated Orange County. The county’s largest city is Orlando with an estimated population of 245,402 residents (BEBR 2012). Orlando serves as the social, cultural, legal, medical and banking center of the region.

Orange County became one of the nation’s majority-minority counties in 2008, with slightly more than 50% of its population being of a group other than single-race, non-Hispanic white. According to the 2010 Census, Orange County’s population is 46 percent White, 26.9 percent Hispanic or Latino, 19.5 percent African American, 4.8 percent Asian and 2.8 percent other races.

Table 3: Orange County Major Employers (by # of employees)

Employer	Employees
Walt Disney Co. (Walt Disney World)	62,000
Florida Hospital (Adventist Health System)	16,000
Publix Supermarkets Inc.	15,606
Universal Orlando	13,000
Orlando Health	13,000
SeaWorld Orlando	7,290
Lockheed Martin Corporation	7,200
Darden Restaurants Inc.	6,500
Marriott International Inc.	6,312
Starwood Hotels & Resorts Worldwide Inc	5,369

Source: Metro Orlando Economic Development Commission - March 2011



Figure 3: G&T Conveyer Company, Lake County, FL

Large distributors, such as Dunkin’ Donuts, Domino’s Pizza, and Embark have found the county’s central location a significant business benefit. Convenient access to Florida’s Turnpike allows for easy and efficient distribution throughout the state and the Southeast.

An emerging industry in Lake County has been sports medicine and technology. South Lake Hospital’s 150-acre all-in-one campus is home to the National Training Center, which is designed to meet the needs of residents and athletes of all ages and fitness levels. Together the Central Florida Sports Commission and National Training Center partner to develop triathlon training programs and events throughout central Florida.

Another emerging market for Lake County includes agri-technology. Companies such as Agri-Starts III, Inc., Florida Food Products, Inc., and Senninger Irrigation, Inc. call the county home. The 80-acre Eustis Commerce Park has attracted high-wage, high-value tenants such as Valensa International and Traymax, Inc.

Tourism is one of the largest sectors of Orange County’s economy. Interstate 4 and the Florida Turnpike intersect at the world famous attractions of Disney World, Universal Studios and Sea World. Central Florida is the first area in the country to attract more than 50 million annual visitors. Orange County is also home to the second largest university in the nation (University of Central Florida), one of the top ten research parks in the country, one of only two National Entrepreneur Centers, a world-class international airport, and an all new Medical City which includes the UCF College of Medicine, opened in 2009.

On August 6, 2007, Orange County and the City of Orlando entered into an interlocal agreement to spend \$1.1 billion to build two new community venues: the Amway basketball arena and the Dr. Phillips Performing Arts center, and to renovate the Florida Citrus Bowl Stadium. The new Amway Center opened its doors to the Central Florida community on October 1, 2010. The Amway Center is the most technologically-advanced events center in the country and the first NBA facility to earn Leadership in Energy and Environmental Design (LEED) new construction certification from the U.S. Green Building Council. The Amway Center uses 20% less energy and 40% less water than arenas of similar size (www.amwaycenter.com/leed-gold-certification).

The Dr. Phillip’s Performing Arts Center (DPAC) broke ground on June 23, 2011, resulting in the immediate creation of 3,000 construction jobs. DPAC will include two grand performance theaters, a community theater, outdoor plaza and performance space, rehearsal rooms, administrative offices, and educational programming space. This state-of-the-art venue will establish a creative center that captivates both Florida’s tourists and residents for years to come.

The Florida Citrus Bowl Stadium was originally constructed in 1936 and held its first annual bowl game in 1947. A historic symbol to the community, the Florida Citrus Bowl was the site of five 1994 World Cup Soccer games and 1996 Olympic Soccer matches. The Citrus Bowl has also been host to “Rock Superbowls” featuring such performers as The Rolling Stones, Pink Floyd, and Paul McCartney.



Figure 4: Dan Burroughs, Stacey and Al Ducharme demonstrate a flying machine that is controlled by a circuit board that they make with help from a UCF-sponsored business incubator in Winter Springs (Orlando Sentinel June 17, 2011).

The University of Central Florida (UCF) Business Incubation Program was founded in 1999 as a university-driven community partnership that provides early stage companies with the enabling tools, training and infrastructure to create financially stable and high growth impact enterprises.

The Business Incubation Program is an economic development collaboration between:

- UCF
- Orange County
- City of Orlando
- Seminole County
- Lake County
- Volusia County
- City of Sanford
- City of Leesburg
- City of Winter Springs
- Osceola County
- City of Kissimmee
- The Corridor

The program has helped more than 140 emerging companies create over \$500 million in annual revenue and more than 1,600 new jobs with an average salary of \$59,000. For additional information, visit www.incubator.ucf.edu.

Osceola County

Previously known as a tourist and ranching mecca, Osceola County is now also viewed as an excellent corporate location. It is the world headquarters of Tupperware Brands Corporation, Disney’s World Wide Shared Services, and Channel Intelligence Technology and Marketing Service Company. In addition, the following well-known companies have located major facilities in Osceola County: Quaker Oats, Lowe’s, Mercury Marine and Nursery Supplies, Inc.

Signs of success in Osceola County also include a thriving 1,200-acre industrial park at Poinciana and cutting-edge commercial development, which encompasses office, retail and residential sites at Celebration, an Osceola community conceived and built by the Walt Disney World Company.

This year, the County partnered with UCF to build a \$195 million “smart sensor” research center in Kissimmee near the Florida Turnpike. The Florida Advanced Manufacturing Research Center will aid in the creation of smart sensors that could be used in a variety of applications such as medical devices, cars, and other machines.



Figure 5: Tupperware Brands Corporation, Osceola County, FL

Table 4: Osceola County Major Employers (by # of employees)

Employer	Employees
Osceola County Public Schools	6,132
Walt Disney Company	3,700
Walmart Supercenter (5)	2,730
Gaylord Palms Resort & Convention Center	1,445
Osceola Regional Medical Center	1,357
Osceola County Government	1,715
Publix	1,350
Florida Hospital - Celebration	1,300
McLane/Suncoast, Inc.	900
Florida Hospital – Kissimmee	450
Lowe’s	607
Tupperware Brands Corporation	300

Source: Osceola County Economic Development Office 2010



Figure 6: Florida Hospital Celebration Health, Celebration, FL

SEMINOLE COUNTY

Seminole County is an emerging center for high technology businesses and corporate headquarters.

Industry growth in Seminole has taken several forms. Most notable is the establishment of corporate headquarters, such as American Automobile Association (AAA), Mitsubishi Power Systems, Scholastic Book Fairs, and Sears Home Improvement Products, as well as the emergence of many high tech companies, including CuraScript, Kinetics, Faro Technologies, Team Information Systems, and Convergys. Ongoing expansion at the Orlando Sanford International Airport (OSIA), coupled with the state’s largest foreign trade zone designation, has helped OSIA become the third most active international airport in Florida and the 12th most active in the United States.

Seminole County, “Florida’s Natural Choice”, has been a leader in land conservation and trails building. The award winning Seminole County Trail system is comprised of three showcase paved trails, Seminole Wekiva Trail, Cross Seminole Trail and the Kewannee Trail, as well as one showcase unpaved trail, the Flagler Trail. Much of the trail system follows the Florida National Scenic Trail.

VOLUSIA COUNTY

Volusia is renowned for its 47 miles of world-class Atlantic Ocean beaches, including Daytona Beach, Ormond Beach, and New Smyrna Beach. The County is the headquarters for NASCAR, the Ladies Professional Golf Association, the biannual summer home of the London Symphony Orchestra, and host to hundreds of cultural and musical entertainment venues year-round.

Table 5: Seminole County Major Employers (by # of employees)

Employer	Employees
Florida Hospital	1,638
Sprint / Embarq	1,459
Convergys	1,417
Waste Pro of Florida	1,316
South Seminole Hospital	1,039
American Automobile Association	988
Chase Bankcard Service	907
United Parcel Service	862
Central Florida Regional Hospital	857
Sears Home Improvement Products	713

Source: Seminole County, July 2011



Figure 7: Seminole County Trails System

The City of Daytona Beach serves as home to the world famous Daytona International Speedway and the “Daytona 500” as well as host to hundreds of thousands of visitors for other special events such as Bike Week and Biketoberfest. The County’s diversified economy is supported by the development of projects like DeLand Crossings Industrial Park and the Daytona Beach International Airport Corporate Center.

Volusia County is home to a growing manufacturing workforce supporting over 400 manufacturing companies with strong production clusters focusing on medical related products, oil and gas exploration, automotive components, aviation and recreational marine. Among the leading manufacturers are Covidien, Florida Production Engineering, Teledyne Oil & Gas, Energizer Personal Care, Boston Whaler, DaVita, Everglades Boats, QuantumFlo, Sparton Electronics Corporation, and Raydon Corporation.

The corporate offices of industry leaders such as Brown and Brown Insurance, NASCAR and the nation’s 7th largest telecommunications company, Frontier Communications, are also located in Volusia County communities. Volusia County is also home to Embry-Riddle Aeronautical University, Stetson University, Bethune-Cookman University, Daytona Beach Community College, University of Phoenix, Webster College, and the University of Central Florida Daytona Campus.

The UCF Business Incubator at Daytona Beach International Airport officially opened July 27, 2011. Financed by the Volusia County Council, the 9,600 square-foot facility is one of eight incubators operated by UCF. The facility is part of the county’s Center for Innovation and Technology and is adjacent to the Federal Aviation Agency’s NextGen test center at the eastern end of the airport’s international terminal. The incubator is seen as a major catalyst for business creation and growth in Volusia County.

Table 6: Volusia County Major Employers (by #of employees)

Employer	Employees
Volusia County School Board	8,998
Halifax Staffing (Regional Medical Center)	6,330
Publix Supermarkets	2,798
Walmart	2,206
Vision HR Inc.	1,667
Embry-Riddle Aeronautical University	1,513
Florida Hospital Ormond Memorial	1,403
Daytona Beach Community College	1,334
Winn Dixie Stores Inc.	1,290

Source: Enterprise Florida, Inc.



Figure 8: Daytona Rising Complex, Daytona Beach, FL

ENVIRONMENT

The rapid growth of the East Central Florida region since the end of World War II has resulted in 394 square miles of habitat being destroyed in the six county East Central Florida Region and Polk County (ECF 2060 Plan). Natural areas that were once considered less valuable are now understood to be some of our most treasured natural resources deserving of protection.

Tourism is Florida's number one industry and it depends on preserving a pristine natural environment for beaches, trails, fishing and general outdoor recreation. According to Visit Orlando, the 2011 economic impact of tourism in Orange, Osceola and Seminole Counties reached \$31.7 billion.

Environmentally sensitive marine waters, estuarine waters, rivers, lakes, and other high quality bodies of water are also found throughout East Central Florida. Some of these water resources are worthy of special protection because of their natural attributes. Many have been classified as 'Outstanding Florida Waters'. This designation offers additional protections to assure water quality is maintained and enhanced.

In 2004, Naturally Central Florida (a regional partnership initiative between myregion.org and the University of Central Florida Metropolitan Center for Regional Studies) conducted a regional evaluation of the most significant natural area assets. Naturally Central Florida identified seven regional "jewels" that represented "must save" places that contribute local, regional, statewide and national environmental and economic value. These systems represent green infrastructure for regional growth decisions, and conservation land efforts are underway for each system.

Both public and private open space is essential for the health and sustainability of our wildlife, ground and surface water, air, soils, vegetative communities, water recharge areas, wetlands, and human environment. Today, approximately one quarter of the region (2,100 square miles) of exceptional conservation land has been preserved (including the EDD and Polk County) through some form of conservation (acquisition or conservation easement) and initiatives at the federal, state and local level, including Florida's renowned Preservation 2000 and Florida Forever Programs.

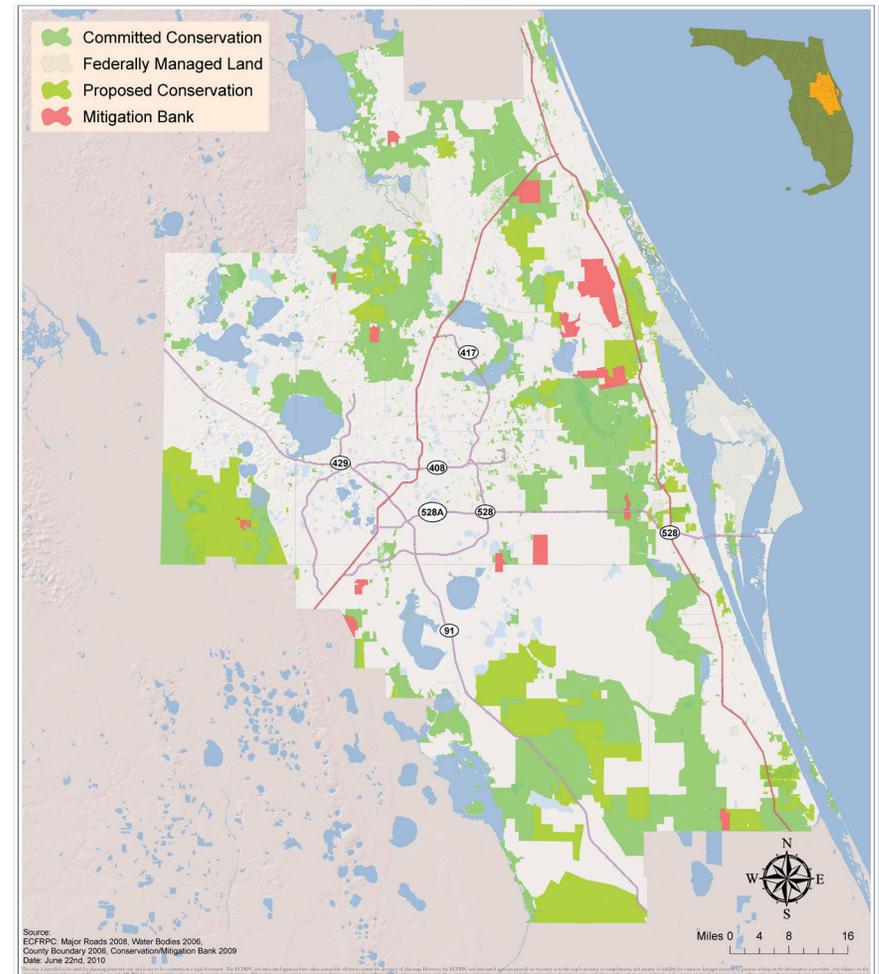


Figure 9: Committed and proposed conservation lands along with Federally managed lands and mitigation banks for East Central Florida (Source: ECFRPC)

The Six County Committed Conservation Mitigation Banks and Proposed Conservation 2009 Map (Figure 9) shows critical ecosystems that have been conserved, and those that still need to be considered for preservation.

The Archie Carr National Wildlife Refuge in Brevard and Indian River Counties exemplifies a regional conservation project with global ecological and economic significance. This 20-mile stretch of central east coast barrier island oceanfront represents one of the most important sea turtle nesting areas in the world.

Over \$100 million in public funds (federal, state and local) was invested in the conservation initiative, together with significant private conservation land funding from the Richard King Mellon Foundation American Land Conservation Program (over \$40 million).

This conservation network:

- protects natural habitats and species
- creates valuable green space for local communities
- attracts visiting scientists from around the world
- is the planned location for a world-class marine and coastal research center
- secures exceptional beach and water access for recreation and tourism
- decreases development density in a fragile, high-hazard coastal community

The Archie Carr National Wildlife Refuge regional partnership represents a good small area study to demonstrate the potential economic value of an expanded green space network strategically located and designed for the central Florida region.

Although important natural resources have been protected through various programs, it is clear that the public purchase of environmentally sensitive areas alone will not be sufficient to ensure the long-term integrity of the region's resources and complex network of connected ecosystems. Current land acquisition funding is insufficient and many local growth management policies do not adequately plan for large scale, connected ecosystem protection.

While promoting a regional approach to land preservation, it is important to develop creative sustainable ways to protect, enhance and utilize natural resources.

The economic value of these natural ecosystems, habitats, and species of national and international significance, as well as the Florida Greenway and Trails system, are exceptional, especially when considering the impact of green infrastructure on local economies and sustainability. Early economies took advantage of the vast resource rich landscapes in the in the East Central Florida region by investing in agricultural, ranching and aquatic related commerce and practices. The six county Economic Development District, however, is not a region rich in extractive resources (i.e. metal ore, oil, gas), except for off shore resources.

Recreation and ecotourism opportunities are abundant in East Central Florida with world class beaches, numerous inland lakes, and an extensive network of public lands in conservation. These resources are essential to sustain and grow the recreation and nature-based tourism industry as a major component of the local economy.



Figure 10: Eco-Tourism in East Central Florida

WATER

Groundwater withdrawal is exceeding recharge. In 2006, Two Water Management Districts announced that no new permits for additional consumption use will be issued for withdrawal from the underground aquifer after 2013. More water will be provided from alternative water sources such as treated surface waters or high tech desalination plants, which is significantly more expensive. Alternatively, the region is being encouraged to cut its profligate water usage and conserve it's water to defer the need for expensive new water projects. Central Florida is one of the highest per capita potable water consumptive regions in the world, due largely to lawn watering of non-native turf grass.

The preservation of critical ecosystems must act as the basic building block of future development patterns. Smarter decision making about where and how development occurs and the protection of working agricultural landscapes and natural resources will be critical to achieving a successful regional vision for the future and a sustainable economy.

The combined inventory of natural land and water assets in the region serves as the foundation for many economic opportunities and holds the potential to become a cornerstone economic engine for the region and the entire state. Growing economic evidence suggests that Central Florida needs to take a much more detailed look at its economic values, the growth potentials of the land, and its water-based economy of Florida.

CLIMATE CHANGE

Climate change demonstrated by warmer global temperatures can have a huge impact on East Central Florida's economy and environment. Climate change will impact surface water quality and quantity, migration of wildlife and their habitats and increase storm surge and erosion associated with tropical events. Sea levels are estimated to rise at least one meter by 2100. If this happens, Florida's coastal communities will have to relocate inland at a cost too large to estimate. Figure 11 shows the potential impact of sea level rise in one foot intervals on the City of Satellite Beach.

Climate change may have an impact on Port Canaveral's commercial infrastructure. Plans for cargo docks are being developed to reflect concern for a rise in sea levels.

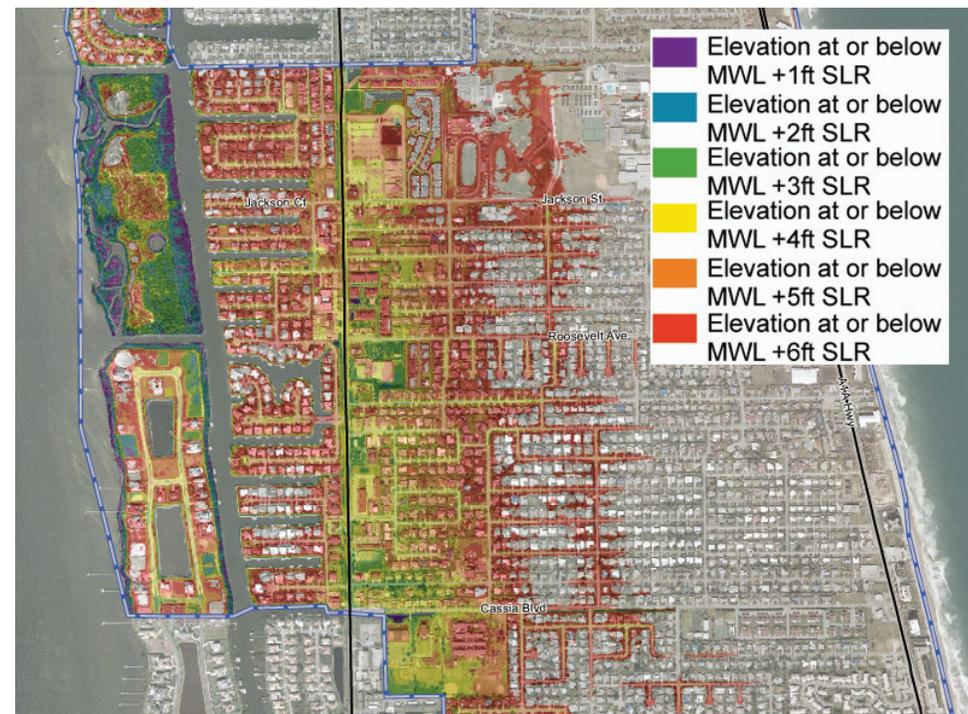


Figure 11: Map of projected sea level rise in the City of Satellite Beach in 1 foot increments (Source: ECFRPC).

HOUSING AND TRANSPORTATION

A strong economy demands safe, sanitary and affordable housing and an efficient affordable transportation system. The Comprehensive Economic Development Strategy endorses and embraces a housing affordability approach that promotes the location of households near job centers and transit.

Many Central Florida communities consider housing affordable if their residents spend less than 30 percent of their income on home costs alone (cost burden) or if the housing stock is below market value due to economic downturns or housing condition.

Unfortunately, this affordability index typically does not account for transportation costs and the location of housing. Unlike house payments, transportation costs are often very difficult to track and quantify because they are paid in disaggregated ways. That said, sprawling development patterns have promulgated a “drive ‘til you qualify” phenomenon in Central Florida that increases transportation costs when gasoline price rise as they have.

According to the Center for Neighborhood Technology (CNT), many regional households are actually spending more than 45% of their income on housing and transportation costs combined. In other words, the further people live from work and the other activities, the greater their monthly expenses.

Considering transportation and housing costs together is more likely to demonstrate that community location, character and design are better predictors of overall affordability than household size and income. Accordingly, the CEDS promotes policy direction that would create partnerships,

locate households near transit alternatives, and direct transportation incentives and investments to foster affordability and economic competitiveness.

The CEDS encourages communities to consider affordable housing as it promotes regional economic development activity. One tool available to local communities is the H+T index developed by the Center for Neighborhood Technology.

This index looks at 337 U.S. metro areas and compiles census data to compute housing and transportation costs as a percentage of household income and maps Census tracts when H+T are greater than 45% of gross revenue. The index is an innovative tool that measures the true cost of housing based on its location by measuring the transportation costs associated with place. The index could be used locally to promote the location of households near transit and to direct transportation incentives and investments to foster affordability.

The index could be particularly useful when deciding where to help finance low-income housing and when deciding whether to offer low-interest loans to first-time home buyers, builders of low-cost apartments, and other projects intended to help low-income citizens. The index also could be useful for residents trying to decide where to buy or rent.

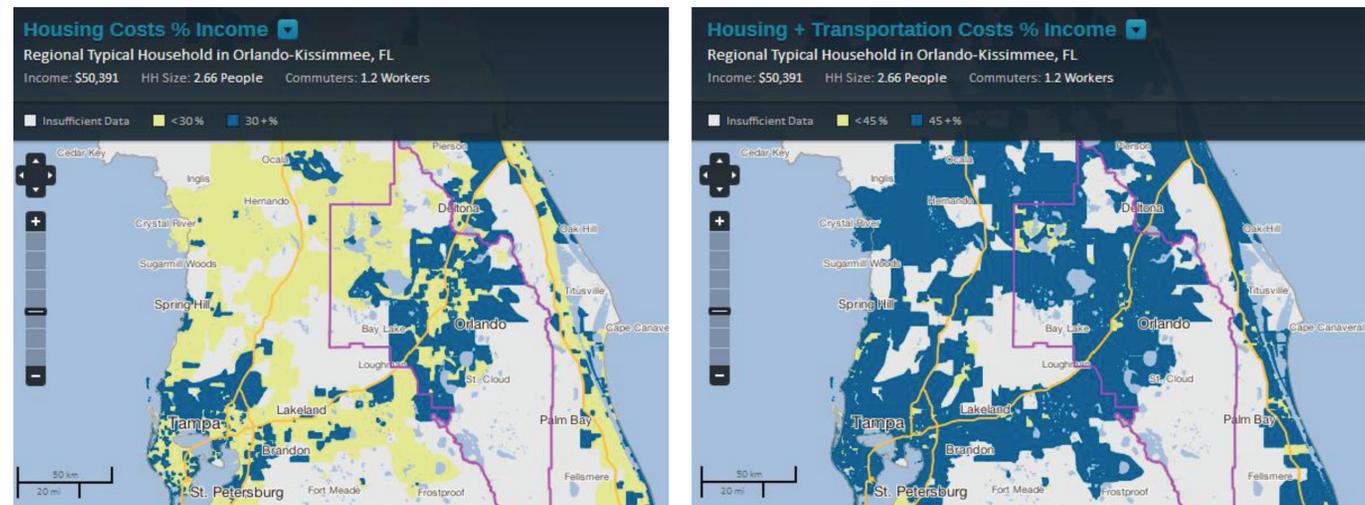


Figure 12: Orlando MSA, Center for Neighborhood Technology, H+T Affordability Index

For a long time Florida's economy has depended in large part on population growth and real estate development. In 2006, the real estate, rental, leasing and construction industries contributed 25% of the region's value added gross regional product. This means that one fourth of sales in the state came from these sectors. The great contributions of these sectors to sales in the state and the region give extra explanation for the effects of the current housing recession on East Central Florida.

Tables 7, 8 and 9 show the yearly percentage change in realtor sales of single-family existing houses and their median sales price for Florida and three (3) Metropolitan Statistical Areas (MSA) in the East Central Florida Region, Daytona Beach, Melbourne-Titusville-Palm Bay, and Orlando. Each year displays the number of units sold and the median sales price. The percent change shows how median sales prices continue to decrease while realtor sales have begun to increase in 2009 after several years of decline. (Source: Realtors Association)

Table 7: Florida Sales Report Year End 2008 Single-Family, Existing Homes

Statewide & MSAs	Realtor Sales			Median Sales Price		
	Year End 2008	Year End 2007	% Change	Year End 2008	Year End 2007	% Change
STATEWIDE	\$124,215	\$129,855	-4	\$187,800	\$234,300	-20
Daytona Beach	\$6,087	\$6,688	-9	\$165,700	\$197,200	-16
Melbourne-Titusville-Palm Bay	\$5,097	\$5,207	-2	\$153,400	\$193,100	-21
Orlando	\$16,659	\$17,143	-3	\$201,500	\$248,900	-19

Table 8: Florida Sales Report Year End 2009 Single-Family, Existing Homes

Statewide & MSAs	Realtor Sales			Median Sales Price		
	Year End 2009	Year End 2008	% Change	Year End 2009	Year End 2008	% Change
STATEWIDE	\$163,148	\$124,168	31	\$142,600	\$187,700	-24
Daytona Beach	\$7,934	\$6,087	30	\$130,500	\$165,700	-21
Melbourne-Titusville-Palm Bay	\$5,900	\$5,097	16	\$116,000	\$153,400	-24
Orlando	\$23,994	\$16,659	44	\$144,600	\$201,500	-28

Table 9: Florida Sales Report Year End 2010 Single-Family, Existing Homes

Statewide & MSAs	Realtor Sales			Median Sales Price		
	Year End 2010	Year End 2009	% Change	Year End 2010	Year End 2009	% Change
STATEWIDE	\$170,848	\$162,873	5	\$136,500.00	\$142,500.00	-4
Daytona Beach	\$8,488	\$7,780	9	\$119,100.00	\$130,300.00	-9
Melbourne-Titusville-Palm Bay	\$6,110	\$5,900	4	\$105,900.00	\$116,000.00	-9
Orlando	\$26,808	\$23,994	12	\$131,400.00	\$144,600.00	-9

POPULATION

East Central Florida has been negatively impacted by the collapse of housing prices caused by oversupply, lack of demand and the banking and credit crisis of 2008-2011. Local market values of single family homes lost 40-50% of value since their peak in 2006, which was a time of irrational price inflation followed by a market crash. See Figure 13 for the change in median sales prices for the Orlando MSA.

For East Central Florida, new home construction and sales have traditionally been a powerful economic driver. As a result of job losses, the lingering national credit crisis, and an oversupply of existing housing stock cheaper than new construction, there is very little current demand for new housing. Therefore, unlike previous recessions where a resurging housing market led the region out of recession, this time that is unlikely to happen.

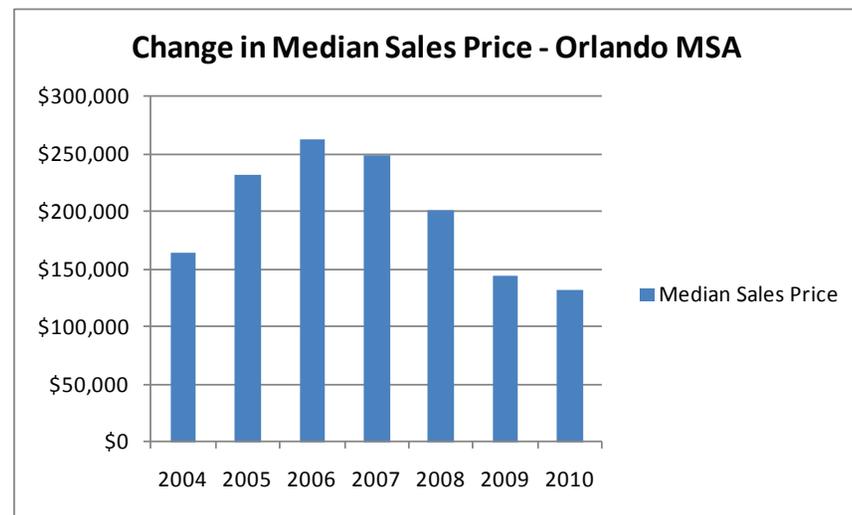


Figure 13: Change in median sales price of homes in the Orlando Metropolitan Statistical Area (MSA) from 2004 to 2010

The East Central Florida Region has experienced a dramatic transformation. What in the 1950's used to be small towns and citrus groves is now a thriving metropolitan region with a diverse mix of people and incomes. According to U.S. Census data, the regional population has increased over 970% in the past 56 years.

Central Florida doubled in population (10% annual average increase) from 1950 to 1960 before it settled into three (3) decades (1960-90) of 4% average annual growth. From 1990-2000, growth remained steady at 2.7% per year, but from 2000-2007 had slowed to 1.95% annually.

The latest U.S. Census figures indicate that population growth continued to slow across the region, with out-migration exceeding in-migration in recent years.

Table 10: U.S. Census Population Data

Jurisdiction	1980	1990	2000	2010
Brevard	272,959	398,978	476,230	543,376
Lake	104,870	152,104	210,509	297,052
Orange	470,865	677,491	896,354	1,145,956
Osceola	49,287	107,728	172,493	268,685
Seminole	179,752	287,529	365,202	422,718
Volusia	258,762	370,712	443,343	494,593

Source: U.S. Census Bureau, 2010 Census

Why has growth slowed? There are many reasons:

- Florida was one of hardest hit states in the 2009 foreclosure/credit/banking crisis and resulting international recession.
- Because of the credit market collapse, credit is tight, even though interest rates are low.
- According to the FIU Research Institute on Economic Policy, Florida lost 715,200 jobs because of the recession.
- Many of the laborers who came to Florida to rebuild after the 2004-05 hurricanes have left, there having been no significant hurricanes since then.

For a state that finances itself largely on continued growth, this has meant a loss of property tax revenues and a constricted economy. The fundamentals of Florida’s attractiveness- its natural resources, recreation, beaches, and climate – have traditionally attracted newcomers, so when the current recession ends future population growth should resume, but at what rate?

According to preliminary estimates from the University of Florida’s Bureau of Economic and Business Research (BEBR), the State of Florida added 184,00 residents in the past year, which equals a one percent annual growth rate (BEBR, 2013).

Orange County is expected to lead the state in growth for the next 30 years, adding nearly 656,000 residents by 2040, according to the medium projections from the University of Florida Bureau of Economic and Business Research. “The expectation is that eventually we will get out of this recession and things will return more to normal,” said Stan Smith, director of the Bureau of Economic and Business Research at the University of Florida. (Source: Orlando Sentinel)



Figure 14: The Annual Corporate 5k in downtown Orlando

Central Florida Projected Growth

Fastest-growing counties, 2010-2040

Rank	County	Population change
1	Flagler	125.1%
2	Sumter	121.7%
3	St. Johns	98.7%
4	Osceola	96.3%
5	St. Lucie	83.8%
7	Lake	75.3%
14	Orange	58.4%
34	Seminole	33.4%
49	Volusia	23%

Projected Central Florida growth by decade

Orange	
2010	1.1M
2020	1.4M
2030	1.6M
2040	1.8M

Seminole	
2010	422,718
2020	472,200
2030	522,300
2040	563,800

Lake	
2010	297,052
2020	374,400
2030	452,800
2040	520,700

Osceola	
2010	268,685
2020	357,800
2030	448,000
2040	527,500

Volusia	
2010	494,593
2020	535,700
2030	576,100
2040	608,300

SOURCE: University of Florida Bureau of Business and Economic Research

Figure 15: Central Florida Projected Growth (Source: Orlando Sentinel, 2011)

Table 11: Where East Central Florida Residents lived One Year Ago, By Number

	Same house	Same County	Same State Different County	Different state	Abroad
Brevard County, Florida	451,936	57,637	11,312	16,160	1,616
Lake County, Florida	253,011	19,780	10,628	10,923	886
Orange County, Florida	892,510	152,158	45,420	29,523	15,897
Osceola County, Florida	224,954	21,056	11,194	7,196	2,132
Seminole County, Florida	370,857	25,591	15,103	6,712	1,259
Volusia County, Florida	422,415	37,777	13,737	14,718	1,962
East central Florida region	2,615,684	313,999	107,395	85,234	23,752
Florida	15,552,098	1,920,703	540,780	484,838	149,181
United States	258,561,802	28,729,089	9,780,115	6,723,829	1,833,772

Source: U.S. Census Bureau, 2010 American Community Survey

Table 12: Where East Central Florida Residents lived One Year Ago, By Percentage

	Same house	Same County	Same State (Different County)	Different State	Abroad
Brevard County, Florida	83.90%	10.70%	2.10%	3.00%	0.30%
Lake County, Florida	85.70%	6.70%	3.60%	3.70%	0.30%
Orange County, Florida	78.60%	13.40%	4.00%	2.60%	1.40%
Osceola County, Florida	84.40%	7.90%	4.20%	2.70%	0.80%
Seminole County, Florida	88.40%	6.10%	3.60%	1.60%	0.30%
Volusia County, Florida	86.10%	7.70%	2.80%	3.00%	0.40%
East central Florida region	83.14%	9.98%	3.41%	2.71%	0.75%
Florida	83.40%	10.30%	2.90%	2.60%	0.80%
United States	84.60%	9.40%	3.20%	2.20%	0.60%

Source: U.S. Census Bureau, 2010 American Community Survey

TRANSPORTATION ACCESS

To remain competitive the East Central Florida region needs to be able to move goods and services and help commuters get to their jobs as quickly as possible. Currently, our area is mainly dependent on motor vehicles for regional transportation, especially automobiles for commuting and personal transportation. Congestion is a serious problem. People, goods and services cannot efficiently move around the region. Figure 16 displays East Central Florida's road network capacity in 2006. The red lines depict road segments that are currently at or over capacity. These include parts of some of the region's major through fares including I-4, S.R. 50, and U.S. 192. In April 2008, Forbes magazine voted Orlando, Florida as the fourth worst city for commuters.

"Orlando's commuting ills stem from a public transportation system that doesn't service a high share of the population and a population that's spread out. Here, only 34% of commuters get to their jobs in less than 20 minutes, which is the ninth worst rate in the country." (Source: Forbes.com)

While the Florida Department of Transportation and local Expressway Authorities have invested and continue to invest millions of dollars to expand road capacity, environmental constraints like lakes, wetlands and sensitive ecosystems make building new road corridors very difficult. For example, the Wekiva Parkway (the last road segment needed to complete the beltway around northwest metropolitan Orlando) will pass through several environmentally sensitive areas. To minimize the road impact's to the Wekiva River Basin, the toll road will be largely elevated to reduce accidents between accidents between vehicles and wildlife, and includes several wildlife crossing bridges. While important, these features have made building this road segment more expensive.

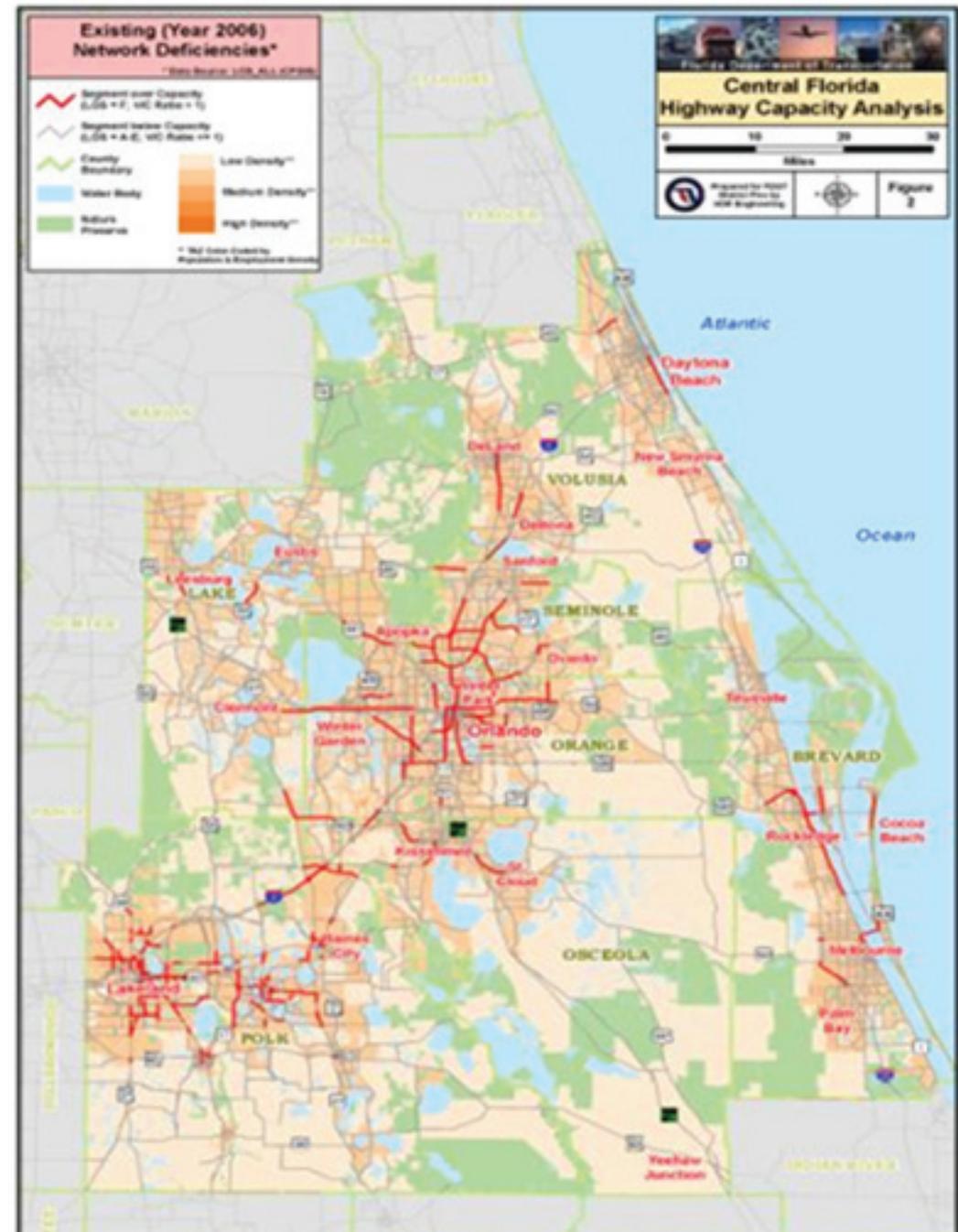


Figure 16: 2006 Regional Roadways Level of Service (Source: FDOT)

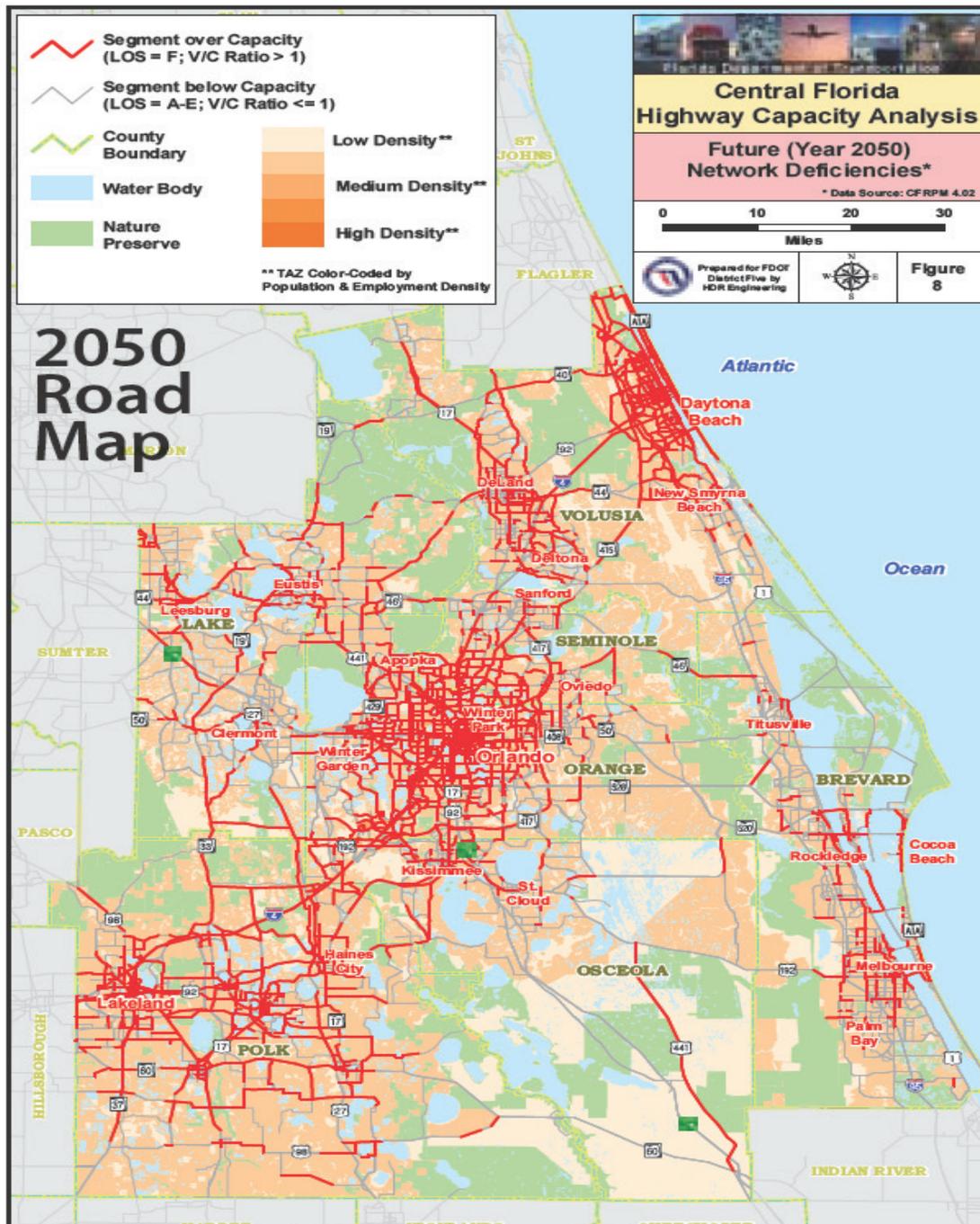


Figure 17: 2050 Projected Regional Roadways Level of Service (Source: FDOT)

Despite all the new investment, the congestion problem is expected to continue. Figure 17 displays the projected Level of Service (LOS) the East Central Florida Region in 2050. It shows an exponential increase in the number of congested roads. Building or expanding new roads is not going to solve this situation. This is a land use problem. The region needs to evaluate how its current land development patterns are exacerbating the congestion of its arterial roads. The region has several limited-access gated communities with dead end cul-de-sac streets that prevent good connections between neighborhoods. Moreover, the separation of residential and non-residential land uses makes commuting by car a necessity in the region. An increase of mix-use land use corridors together with bringing additional mass transportation alternatives will help to alleviate this problem.

2050 Projected Transportation Level of Service

Figure 17 shows what the region's roads will look like in 2050 (even with planned road projects) if we continue to sprawl like we have for the last 50 years. Roads in red will be in failure (long backups and congestion at peak commuting hours).

It is imperative that the region have access to additional transportation alternatives.

The region’s development patterns have exacerbated the problem of congested arterials with thousands of dead end cul-de-sac streets and limited-access gated communities that prevent neighborhood to neighborhood connections.

In April 2008, Forbes magazine voted Orlando, Florida as the fourth worst city for commuters.

“Orlando’s commuting ills stem from a public transportation system that doesn’t service a high share of the population and a population that’s spread out. Here, only 34% of commuters get to their jobs in less than 20 minutes, which is the ninth worst rate in the country.” (Source: Forbes.com)

Table 13: East Central Florida Commute Times

	Mean travel time to work (minutes), workers age 16+
Florida	25.8
Brevard County	23.5
Lake County	27.7
Orange County	26.2
Osceola County	30.3
Seminole County	26
Volusia County	24.9

Source: U.S. Census Bureau, 2005-2009

I-4 CORRIDOR

Interstate Four or I-4 is a 132-mile multilane limited-access highway that has a diagonal northeast-southwest route bisecting the center of the state. I-4 was one of the first Interstate Highways to be built in Florida with the first section connecting Plant City and Lakeland in 1959. Completed in the 1960’s I-4 currently has exits in Hillsborough, Polk, Osceola, Orange, Seminole and Volusia Counties.

In the 2004 and 2008 U.S. Presidential election, the political importance of the land around the highway became known as the I-4 corridor. The

Washington Times printed, “As I-4 corridor goes, so goes Florida” and that sentiment was echoed by the Miami Herald declaring “Florida’s I-4 Corridor is Key Election Battleground.” The reason for this newfound electoral attention was first due to the perception of a cluster of undecided voters in a swing state and second due to the increase in the Hispanic population. Essentially, the I-4 corridor lent pundits and political scientist alike a microcosm of state and national trends.

Sources: Washington Times, January 28, 2008
Miami Herald, October 5, 2008

COMMUTER RAIL

Central Florida’s approved commuter rail, SunRail, is a 61.5-mile corridor connecting the four counties of Osceola, Orange, Seminole, and Volusia. The Florida Department of Transportation (FDOT) will manage the project during planning, design and construction as well as handle the first seven years of operation. Construction will be completed in two phases, with the first phase opening in 2014. This includes 31 miles and 12 stations, starting north at DeBary/Fort Florida Road in Volusia County and terminating at Sand Lake Road in Orange County.

Commuter rail transit uses steel-wheeled trains and consists of one to three cars, along with a locomotive, with the capacity to carry more than 150 passengers in each car. Amenities will include rest room facilities on all trains, power outlets at all seats, luggage and bicycle racks, and wireless Internet connectivity. SunRail will offer an alternative to I-4 for North-South commuters.



Along with the added regional mobility and local access that SunRail provides, it also brings a new opportunity to re-shape Central Florida's development patterns with Transit Oriented Development (TOD). TOD typically incorporates mixed-use buildings with a compact footprint that is walkable and accessible to transit. In addition to encouraging transit ridership, TODs also have a host of environmental, economic and social benefits including a reduction in greenhouse gas emissions, increase in walking and bicycling activity, and an increase in housing and commercial values near the station sites (2011, www.detroittransit.org).

Public investments in infrastructure add value to land and thus encourage private development and job creation. Charlotte, North Carolina has seen \$1.87 billion in investment and development around the station areas along the nine-mile Lynx Blue Line, including about 50 new development projects in Uptown Charlotte, 3,350 new condominium and apartment units, seven new office projects, two new retail projects, and three hotels (UNC Charlotte's Center for Transportation Studies, April 2007 & Reconnecting America).

In Dallas, within five years the 45-mile light rail line generated \$3.3 billion in private investment, 32,000 jobs, and 39-53% greater growth in property values than elsewhere in the city (Center for Economic Development and Research, University of North Texas).

Central Florida is poised for similar economic growth along the 61.5 mile corridor of SunRail.

Private investment and development dollars have already been pledged from Florida Hospital, the Orlando Magic, Orange Crown Holdings, Craig Ustler Development, and the Orlando Regional Health Centers. Furthermore, during the SunRail ground-breaking ceremony on July 18, 2011, Florida Hospital announced that they will be moving their corporate headquarters to a new building adjacent to the Florida Hospital SunRail stop.

Source: http://getmichiganmoving.org/basics/economic_development.html



Figure 18: SunRail, Central Florida's Commuter Rail, Rail Line and Station Stops (Phase I and II) (Source: ECFRPC)

INTERCITY PASSENGER RAIL SERVICE

Florida East Coast Industries (FECI) is developing a privately owned, operated, and maintained intercity passenger rail service that will give businesses and leisure passengers a new way to travel between South Florida and Orlando, and eventually Tampa and Jacksonville.

The new route will feature passenger service along Florida East Coast Railway's existing tracks from Miami to Cocoa and the creation of new tracks into Orlando. With 200 of 240 miles of Right of Way (ROW) already in place, the line has been in service as an operating railroad for over a century.

More than 50 million people travel annually between South Florida and Orlando. This intercity passenger rail will connect America's most visited city, Orlando, with South Florida's business and vacation destinations and allow travelers to escape ever increasing highway congestion.

The project is expected to create nearly 6,000 direct construction jobs and another 1,000 jobs for permanent rail operations; taxpayer savings from reduced highway maintenance costs; increased tourism; real estate appreciation; and new transit-oriented development opportunities.

The route will include stops in Miami and Orlando, with intermediate points in Fort Lauderdale and West Palm Beach; stations will provide access to international airports, seaports, and existing commuter rail systems.

BUS SERVICE IN THE REGION

LYNX

LYNX provides public transportation services for Orange, Seminole and Osceola counties. Daily fixed-route local bus service provides more than 85,000 passenger trips each weekday spanning an area of approximately 2,500 square miles with a resident population of more than 1.8 million. Small portions of Lake, Polk and Volusia counties are served as well.

The administrative and passenger facility, LYNX Central Station, is located in downtown Orlando. Other facilities include the LYNX Operations Center, South Street and the Osceola Satellite Facility.

Other LYNX services include LYMMO, a free downtown Orlando circulator; a commuter assistance Vanpool program; ACCESS LYNX paratransit Service; nine PickUpLine community circulators; Xpress service from Lake and Volusia counties; and the Road Rangers sponsored by State Farm roadside assistance program on Interstate 4.



Figure 19: LYNX in downtown Orlando, FL



Figure 20: Space Coast Area Transit

SCAT – Space Coast Area Transit

Space Coast Area Transit is Brevard County’s bus service. SCAT combines a mix of fixed route and paratransit service, car and vanpooling services. Space Coast Area Transit is committed to combining their resources with emerging technology to ensure Brevard's current and future transportation needs are addressed. In 2007, SCAT launched new services including an interactive trip planner, evening service on most routes and Saturday service on every route.

Lake Xpress

LakeXpress is Lake County’s fixed route bus service, which began in May 2007. Bus service runs every hour from Lady Lake to Mount Dora with circulator routes in the cities of Leesburg and Mount Dora. The system was designed to improve commutes along U.S. Highway 441. The service will be expanded to other urban areas of the County in the future.

VOTRAN – Volusia County’s Public Transit System

The Volusia County Council created Volusia County’s public transportation system, called Votran, in 1975. Votran provides transportation to all urban areas of the county with a fleet of 55 revenue-producing fixed route buses, four trackless trolleys and 44 paratransit vehicles.

Standard daily service runs from 6 a.m. - 7 p.m., Monday - Saturday, with limited fixed route service on Sunday and at night. The frequency of most routes is one hour, with a few operating on the half-hour. Service is provided seven days per week. Votran also operates seasonal trolley service from January through September each year.

As the Community Transportation Coordinator (CTC) within Volusia County, Votran ensures the provision of demand response paratransit services for the disabled and disadvantaged community. The transit routes extend approximately 640 directional route miles providing service in a County that is just over 1,200 square miles in size.



Figure 21: VOTRAN Bus

WORKFORCE DEVELOPMENT

Job creation and retention is a primary goal of regional economic development. Over the years, the region has been very successful in attracting new businesses and people, and building unique clusters in aerospace and defense and life sciences, among others.

Reported by the U.S. Bureau of Labor Statistics, employment increased in 17 of 22 large counties in Florida from September 2011 to September 2012. Among the 22 largest counties in Florida, employment was highest in Miami-Dade County (990,700) in September 2012. Two other counties—Broward and Orange—had employment levels exceeding 650,000. Together, Florida's 22 large counties accounted for 85.3 percent of total employment within the State.

East Central Florida's total employment, as of the third quarter 2012, was 1,332,806 (U.S. Department of Labor, Bureau of Labor Statistics, April 13, 2011). The region's employees are primarily employed by the retail trade, accommodation and food services and health care and social assistance sectors (REMI, Inc.).

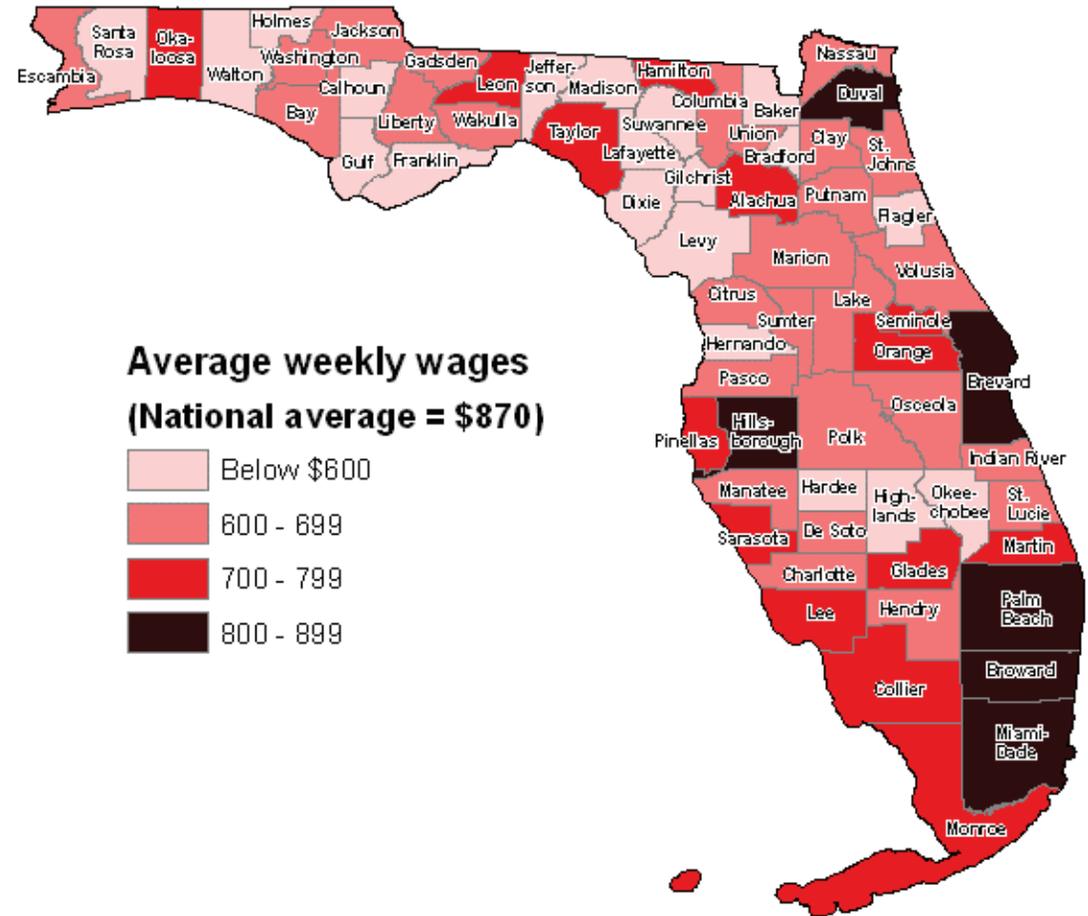


Figure 22: Average Weekly Wages in Florida (Source: U.S. Department of Labor, Bureau of Labor Statistics, April 13, 2011)

EMERGENCY PREPAREDNESS

After the completion of the 2007 CEDS, the Urban Area Security Initiative provided DHS funding to develop a Post Disaster Economic Redevelopment Plan (PDERP) for the region. The plan was developed by the public and private sector with the guidance of consultants from Calvin, Giordano, and Associates. The process identified relevant issues affecting the region's vision for restoring the economy following a disaster. The plan also details actions that can be taken prior to disasters to make businesses and industry more resilient and thus more likely to recover fully with as minimal disruption as possible.

The purpose of the Post Disaster Economic Redevelopment Plan is to provide the East Central Florida Region with comprehensive guidance to key business and government leaders for restoring economic vitality following a disaster. This helps to avoid fragmented decision-making during the difficult and often chaotic disaster recovery period.

Collaborative planning efforts between the CEDS and the PDERP maximize the ability to recover from a disaster while continuing to implement the Regional Vision.

In 2007, the Florida Department of Economic Opportunity (the department), Division of Community Development, in partnership with the Florida Division of Emergency Management, initiated the Statewide Post-Disaster Redevelopment Plan Planning Initiative to create guidance for development of such plans. A focus group consisting of representatives of federal, state, and local government, state universities, and Florida planning organizations provided guidance to the department.

This project is funded by the National Oceanic and Atmospheric Administration through the Florida Coastal Management Program, Florida Department of Environmental Protection, and by the Federal Emergency Management Agency through a Hazard Mitigation Grant administered by the Florida Division of Emergency Management.

The following local governments in the East Central Florida Region are in-progress or have a Post-Disaster Redevelopment Plan:

- Brevard County
- City of Kissimmee
- Orange County (Second Draft Completed)
- Seminole County (Economic and Housing Plans Completed)

It is recognized that economic recovery is one of the most serious issues facing communities following a disaster. Exacerbating this seriousness are the complex economic interdependencies throughout the region. This presents business and industry with a unique challenge that requires a unified, regional response to ensure that the interests of all contributors in this region are represented and protected.



Figure 23: Volunteer disaster relief efforts

UNEMPLOYMENT

The employment situation has continued to improve during the past year. The unemployment in June 2012 is less than eight percent in each of the six (6) East Central Florida Counties, compared to 11 percent in June 2001. The graph below shows the effect of the economic recession in the region with unstable unemployment rates at record highs. We have continued to see a decrease in unemployment rates, and recently the unemployment rates for the region's counties are just slightly above or even below the national average (7.4%).

Source: U.S. Bureau of Labor Statistics (<http://www.bls.gov/lau/laucntycur14.txt>)

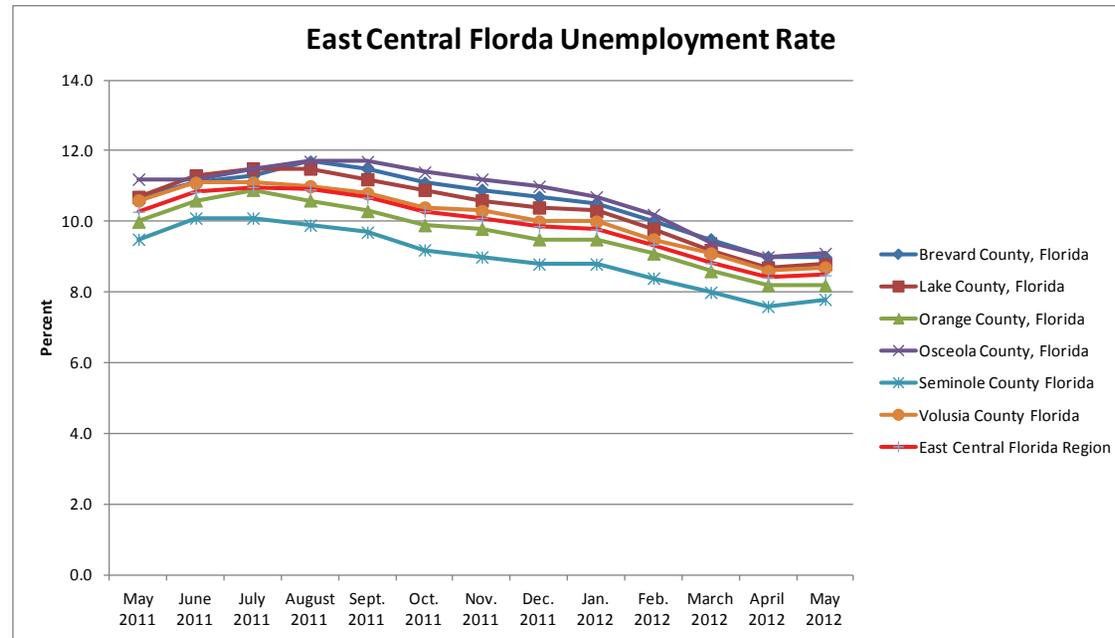


Figure 24: East Central Unemployment Rate by County (Source: U.S. Bureau of Labor Statistics)

Table 14: East Central Florida Unemployment Rate by County

	May 2011	June 2011	July 2011	August 2011	Sept. 2011	Oct. 2011	Nov. 2011	Dec. 2011	Jan. 2012	Feb. 2012	March 2012	April 2012	May 2012
Brevard	10.7	11.1	11.3	11.7	11.5	11.1	10.9	10.7	10.5	10.0	9.5	9.0	9.0
Lake	10.7	11.3	11.5	11.5	11.2	10.9	10.6	10.4	10.3	9.8	9.2	8.7	8.8
Orange	10.0	10.6	10.9	10.6	10.3	9.9	9.8	9.5	9.5	9.1	8.6	8.2	8.2
Osceola	11.2	11.2	11.5	11.7	11.7	11.4	11.2	11.0	10.7	10.2	9.4	9.0	9.1
Seminole	9.5	10.1	10.1	9.9	9.7	9.2	9.0	8.8	8.8	8.4	8.0	7.6	7.8
Volusia	10.6	11.1	11.1	11.0	10.8	10.4	10.3	10.0	10.0	9.5	9.1	8.6	8.7
East Central Florida Region	10.3	10.8	11.0	10.9	10.7	10.3	10.1	9.9	9.8	9.4	8.8	8.4	8.5

According to Reuters, the number of planned layoffs at U.S. firms rose to a 16-month high in July 2011 as sectors which had been seeing fairly few layoffs unexpectedly bled jobs.

Employers announced 66,414 planned job cuts last month, up 60.3 percent from 41,432 in June, according to a report from consultants Challenger, Gray & Christmas, Inc.

Layoffs in the pharmaceutical and retail sectors overtook nonprofit and government job cuts last month, accounting for 20.32 percent and 16.93 percent of announcements respectively.

Job cuts at Merck & Co., Borders, Cisco Systems, Lockheed Martin and Boston Scientific accounted for 57 percent of the July total, according to Challenger, making July the first month in seven when the government sector did not shed the most jobs.

For 2011 so far, employers have announced 312,220 cuts, down 8 percent from the first 7 months of 2010.

Source: Reuters and the Huffington Post, August 2011.

Regional Growth in High Wage Jobs

The region is making big strides towards diversifying the economy with higher paying industries. Figure 24 shows the projected increase in the number of jobs until 2020 for job categories that have higher than average wages in the region.

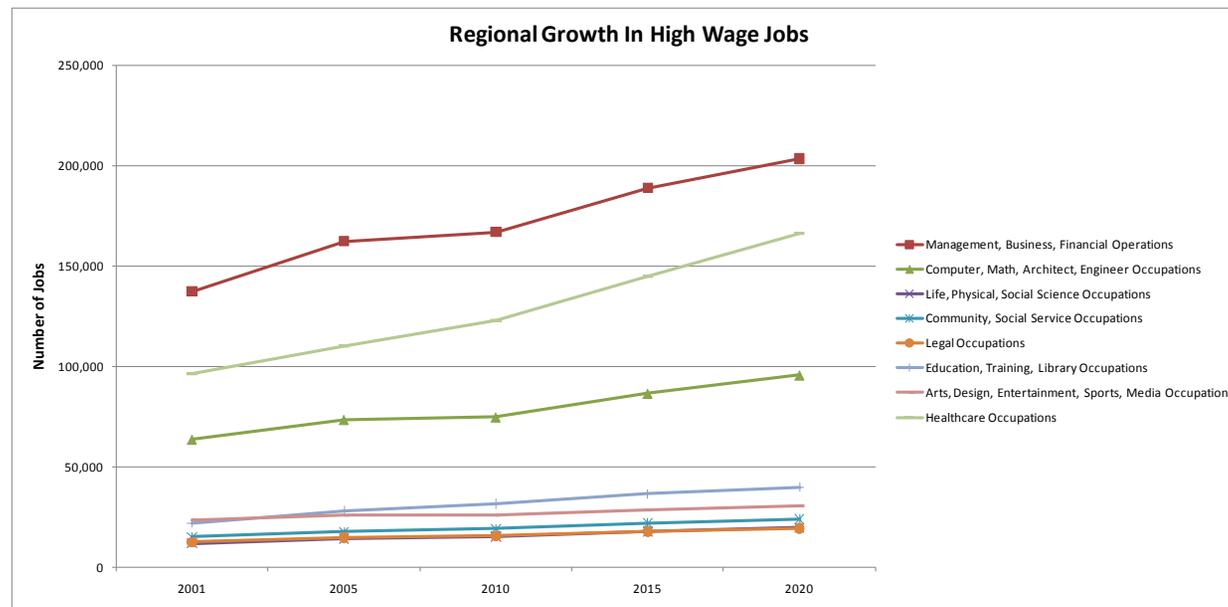


Figure 25: Regional Growth In High Wage Jobs (Source: REMI, Inc.)

Compared to the nation, the Regional Real Per Capita Personal Income has been lagging. This is probably due to our region’s high dependence on tourism and service sector jobs, which tend to pay less than other industries.

Table15 displays the projected percentage growth in the national and regional Real PCPI. Slow growth in personal income directly affects real disposable personal income, which is the money available for consumption after taxes. As consumer prices go up due to inflation and high demand, consumers lose purchasing power if their income is not keeping up. With high unemployment, compensation and real disposable income remain lower than the national average.

Percent Growth In Real Per Capita Personal Income

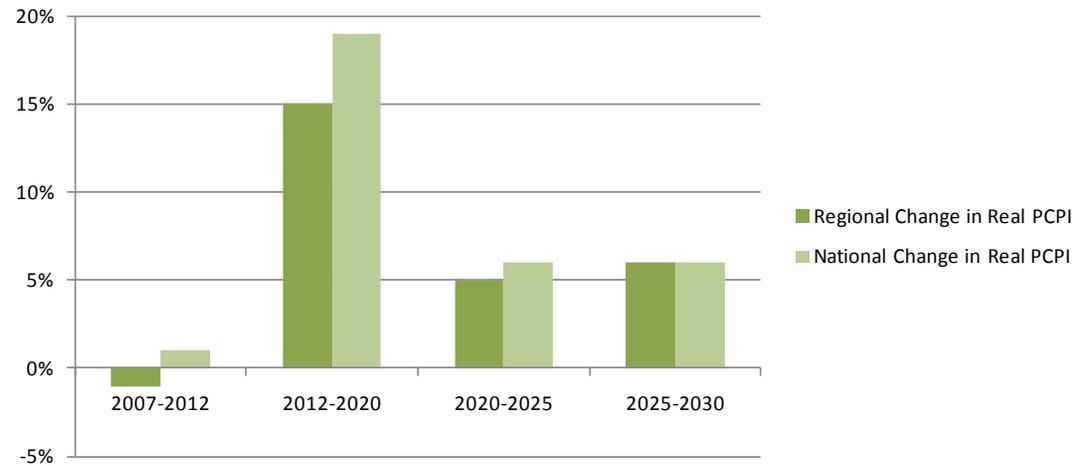


Table 15: Estimated and Forcasted Percentage Growth in Per Capita Income

	2007-2012	2012-2020	2020-2025	2025-2030
Regional Change in Real PCPI	-1%	15%	5%	6%
National Change in Real PCPI	1%	19%	6%	6%

Source: REMI, Inc.

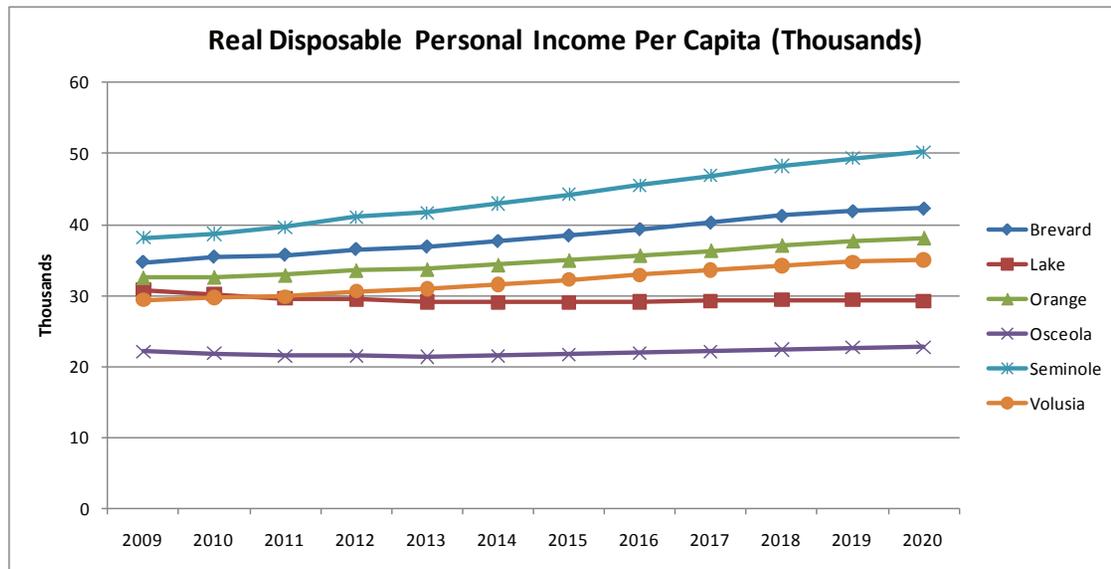
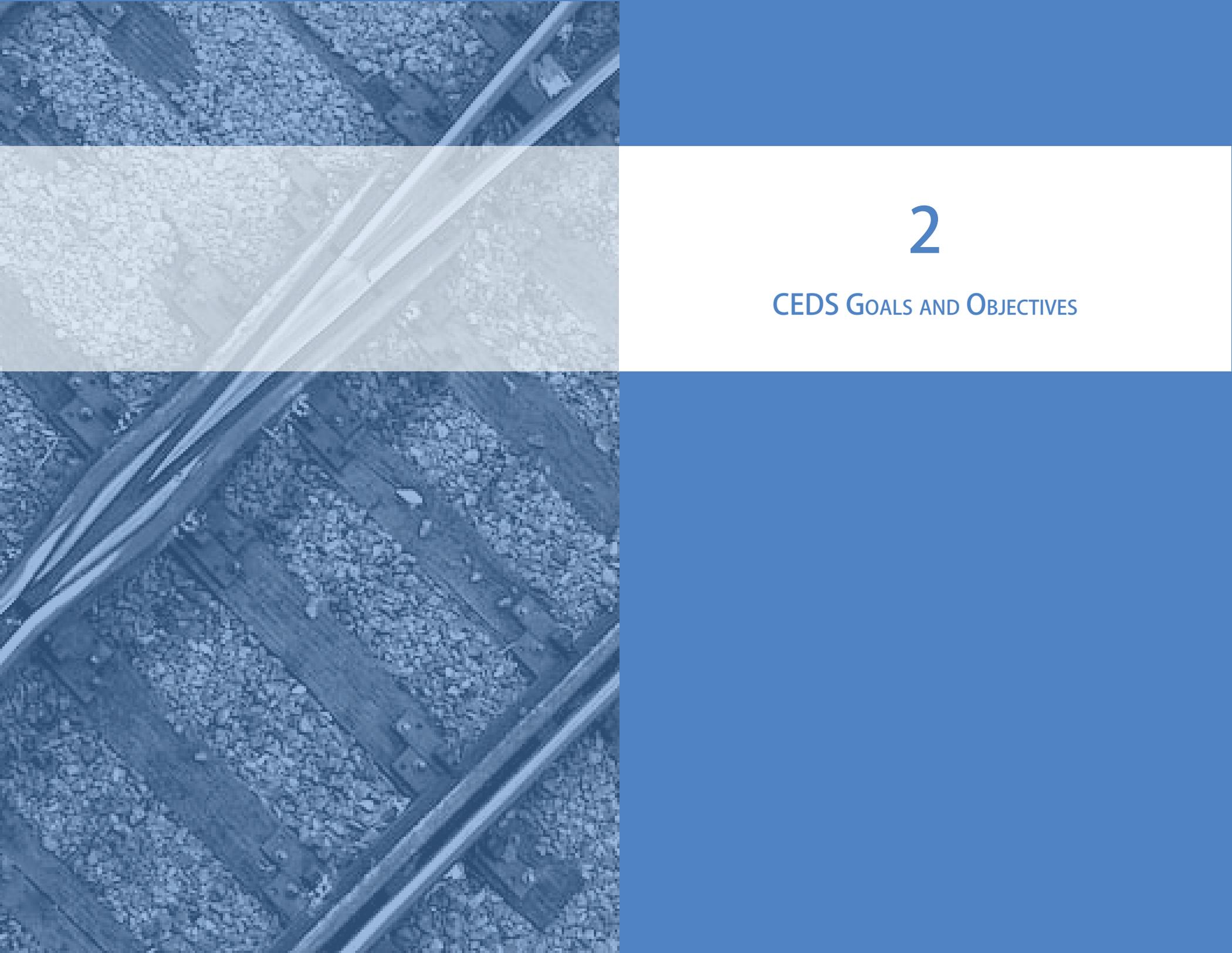


Figure 26: Real Disposable Personal Income Per Capita Projected to 2020 (Source: REMI, Inc.)



2

CEDS GOALS AND OBJECTIVES

MISSION STATEMENT

Make East Central Florida a Center of Innovation to Grow our Core Business Clusters.

Innovation in Core Business Clusters

Enhance: Agriculture, Tourism, Aerospace and Defense, and Maritime Industry

Grow: Renewable Energy, Clean Technology, Manufacturing, and Life Sciences

Innovation in Knowledge and Capital

Build connections between inventors, innovators and investors

Offer lifelong education and training

Innovative Design and Development of Centers of Commerce

Linked by regional transit

Encourage high density, mixed use development

Become creative live, work and play communities

* The Mission Statement categorization helps align strategic projects with the regional mission statement, as shown in the strategic project list (page 50-61).

ECONOMIC VISION

STATE OF FLORIDA

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.

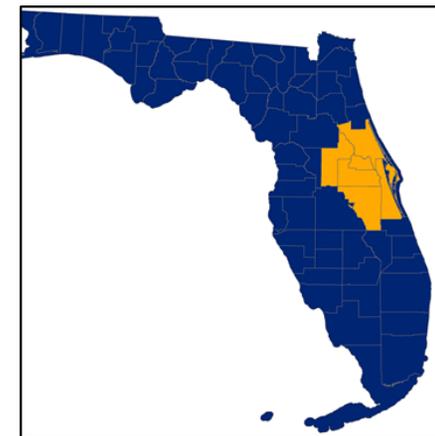
Florida Plan for Strategic Economic Development



EAST CENTRAL FLORIDA

East Central Florida will become the state's nucleus of economic activity by capitalizing on our regional industry strengths, top educational institutions, natural and cultural amenities, high quality communities, and business assistance infrastructure.

East Central Florida CEDS Strategy Committee



GOALS AND OBJECTIVES

Talent Supply and Education

Goal T1: Support educational partnerships and activities that encourage learning opportunities for East Central Florida residents

Objective T1-1 Educate children about career opportunities at early ages

Objective T1-2 Encourage out-of-school enrichment activities such as high tech and business camps for youth

Objective T1-3: Promote libraries as community places of access for new and continuing education for adults

Goal T2: Promote programs and activities that prepare our workforce for lifelong learning and ever-changing careers

Objective T2-1: Increase programs that teach employability and soft skills to workers

Objective T2-2: Promote the development of Massive and Open Online Courses (MOOCs) and other online educational opportunities

Objective T2-3: Work with regional education tech centers to develop a higher number of short-term training and certificate programs

Goal T3: Increase the educational attainment of the East Central Florida workforce

Objective T3-1: Emphasize the importance of higher education and advanced degrees

Objective T3-2: Increase the number of middle-skilled workers

Goal T4: Attract and retain young talented workers

Objective T4-1: Strengthen the existing business base and ensure the success of new companies

Objective T4-2: Support facilities and programs for business startups and collaborations such as co-working spaces and technology and business incubators

Objective T4-3: Nurture programs and organizations that promote community engagement and civic pride in our communities

Innovation and Economic Development

Goal IN1: Expand the manufacturing base of East Central Florida

Objective IN1-1: Maintain the vibrancy of the legacy industries while using their technologies to spin off new businesses

Objective IN1-2: Study the local supply chain of goods and services to ensure it meets manufacturers' needs

Objective IN1-3: Support efforts of the region's economic development organizations to attract targeted industries

Objective IN1-4: Identify and strengthen current industry agglomerations and clusters

GOALS AND OBJECTIVES

Innovation and Economic Development

Objective IN1-5: Support the development of green jobs and industries

Objective IN1-6: Collaborate with the Florida High Tech Corridor Council and other partners to grow advanced manufacturing

Objective IN1-7: Support strategies that facilitate the location of food processing facilities

Objective IN1-8: Maintain our competitiveness in the space travel industry

Objective IN1-9: Focus on attracting value added industries

Goal IN2: Support technology commercialization and entrepreneurship initiatives

Objective IN2-1: Expand access to capital for entrepreneurs and small businesses through micro-lending

Objective IN2-2: Promote the role of philanthropic organizations and angel investors to help with the attraction of capital for new businesses

Objective IN2-3: Increase awareness of technology commercialization efforts

Objective IN2-4: Measure the progress and impact of current business assistance programs

Objective IN2-5: Promote the development of technology incubators, business accelerators, and maker spaces throughout the region

Goal IN3: Increase the region's role in global trade

Objective IN3-1: Raise awareness in local communities about the need to adopt both regional and international approaches to doing business

Objective IN3-2: Increase the number of goods produced in the region and augment the volume of exports

Objective IN3-3: Increase foreign investment and multinational businesses to strengthen international ties

Objective IN3-4: Ensure the region, including the inland counties, is represented in trade and logistics discussions

Objective IN3-5: Maintain status as one of the world's largest leisure travel and convention destinations

Objective IN3-6: Leverage the region's position as a top leisure destination to create more business opportunities

Objective IN3-7: Promote the conservation of vacant industrial land for manufacturing, warehousing, and other industries

Objective IN3-8: Encourage local universities to create degree programs addressing international trade and supply chain/logistics

Objective IN3-9: Assist local jurisdictions with certifying properties for site selection purposes

Objective IN3-10: Promote the freight village concept as a way to optimize the transportation and distribution of goods across the region

GOALS AND OBJECTIVES

Quality of Life and Quality Places

Goal Q1: Identify how SunRail stations can become more attractive locations for new businesses and communities

Objective Q1-1: Link the stations to adjacent communities and workplaces through multimodal transportation options

Objective Q1-2: Promote construction of Transit-Oriented Developments around the stations

Goal Q2: Assist with redevelopment and place-making efforts

Objective Q2-1: Promote the creation of neighborhood matching grant programs to improve community aesthetics

Objective Q2-2: Use overlay districts and other planning mechanisms to redevelop older commercial corridors

Goal Q3: Promote the development of community amenities

Objective Q3-1: Promote the creation of compact, mixed-use, energy efficient and walkable communities

Objective Q3-2: Collaborate with the Main Street Program and Community Redevelopment Areas

Objective Q3-3: Continue strong support of bike trails and the development of a state trail network

Objective Q3-4: Support the proliferation of local art and cultural institutions

Objective Q3-5: Encourage businesses to support employee participation in local community organizations

Goal Q4: Protect the region's natural assets through best practices

Objective Q4-1: Encourage the development of ecotourism and heritage tourism

Objective Q4-2: Support the work of the Wekiva Commission to protect the region's springs

Objective Q4-3: Support efforts to revitalize the Indian River Lagoon

Objective Q4-4: Recognize the economic value of wetlands and natural resources

GOALS AND OBJECTIVES

Infrastructure and Growth Leadership

Goal IG 1: Provide more opportunities for affordable workforce housing to support jobs expansion

Objective IG1-1: Implement regional transportation projects that induce efficient movement of people, goods, and services across the region

Objective IG1-2: Work closely with the SunRail implementation team to ensure appropriate, optimal, and inclusionary implementation of Transit-Oriented Development

Goal IG 2: Improve global connectivity of all of the regions' transportation systems

Objective IG2-1: Support critical pieces of transportation infrastructure necessary to develop, retain, expand, and recruit new primary businesses in East Central Florida

Business Climate and Competitiveness

Goal B1: Reduce the impact of job losses created by the retirement of the Space Shuttle program

Objective B1-1: Ensure the region remains the world's primary gateway to space

Goal B2: Capitalize on more than 50 million tourists visiting the region per year

Objective B2-1: Showcase opportunities for capital investment

Objective B2-2: Become a leader in training and education dissemination by media and/or simulation centers

Civic and Governance Systems

Goal C1: Create and support a vibrant and sustainable economic region by investing in education, infrastructure, and workforce development.

Objective C1-1: Foster balanced geographic growth while raising the quality of economic growth

Goal C2: Encourage collaborative partnerships to develop and implement solutions on long term issues

Objective C2-1: Invest in strategic statewide and regional economic development priorities



3

CEDS PLAN OF ACTION

CEDS Plan of Action

The Plan of Action implements the goals and objectives of the CEDS. Successful implementation of the CEDS will be measured through an annual review of the following indicators:

Each Pillar Becomes a Target Area in the Plan

1. TALENT SUPPLY & EDUCATION:

Maximizes effective development and use of the workforce consistent with any applicable State or local workforce investment strategy

2. INNOVATION & ECONOMIC DEVELOPMENT:

Obtains and utilizes adequate funds and other resources

3. INFRASTRUCTURE & GROWTH LEADERSHIP:

Fosters effective transportation access and promotes the use of technology in economic development, including access to high-speed telecommunications

4. BUSINESS CLIMATE & COMPETITIVENESS:

Promotes economic development and opportunity

5. CIVIC & GOVERNANCE SYSTEMS:

Balances resources through sound management of physical development

6. QUALITY OF LIFE & QUALITY PLACES:

Enhances and protects the environment

As the region continues to grow demographically and economically, it is essential to tie land development, transportation and planning with regional economic development. The East Central Florida Economic Development District (EDD) will support local government's efforts to grow in the most efficient, feasible and economically robust way.

Encouraging development in urban centers and attracting the right industries and companies to the region will enhance the region's economy while allowing it to compete on a national scale. Urban centers connected by multimodal transportation will allow the region to attract more talent to the region, attracting high wage jobs.

The region will succeed in achieving the goals of the CEDS when economic and landuse planning are closely synchronized. This will be the strategy for East Central Florida in the coming years. The ECFRPC will be a leader in promoting a successful economy supported by diverse selection of industries and backed by a well compensated, talented workforce.

CONSISTENCY WITH APPLICABLE STATE AND LOCAL WORKFORCE INVESTMENT STRATEGIES

As outlined in Florida Statutes, 20.60 , The Department of Economic Opportunity's Division of Strategic Business Development is required to create a five year statewide strategic plan designed to help guide the future of Florida's economy. The Department of Economic Opportunity (DEO) is developing a strategic plan in close coordination with Enterprise Florida, Workforce Florida, local governments, local and regional economic development organizations, the business community, educational institutions, as well as other local, state, and federal entities.

The framework adopted for the planning effort used the Six Pillars of Florida's Economy™ developed by the Florida Chamber Foundation under the leadership of Dr. Dale Brill. (Source: *Floridajobs.org*)

DEO facilitated regional forums to gather insights related to the creation of Florida's 2012-2017 Statewide Strategic Plan for Economic Development. The purpose of the forums was to review and prioritize goals, objectives, and strategies for implementation by state government that would assist Florida's regions with economic development and job creation. The East Central Florida Regional Planning Council hosted and organized the East Central Florida regional forum on March 29, 2012 for more than 100 participants at Osceola Heritage Park. Job creation partners and planners from local governments; local and regional economic development organizations; other local, state, federal, and international community and economic development entities; workforce and talent development entities; the business community; educational institutions; and others from the public were encouraged to participate. ECFRPC staff presented participants an overview of the 2012 CEDS Plan at the forum.



Figure 27: Department of Economic Opportunity Regional Forum

Enterprise Florida Inc. (EFI) is a public-private partnership serving as Florida’s primary organization devoted to statewide economic development.

EFI’s mission is:

To diversify Florida’s economy and create better paying jobs for its citizens by supporting, attracting and helping to create globally competitive businesses in innovative, high-growth industries.

EFI focuses on a wide range of industry sectors, including clean energy, life sciences, information technology, aviation/aerospace, homeland security/defense, financial/professional services and manufacturing.

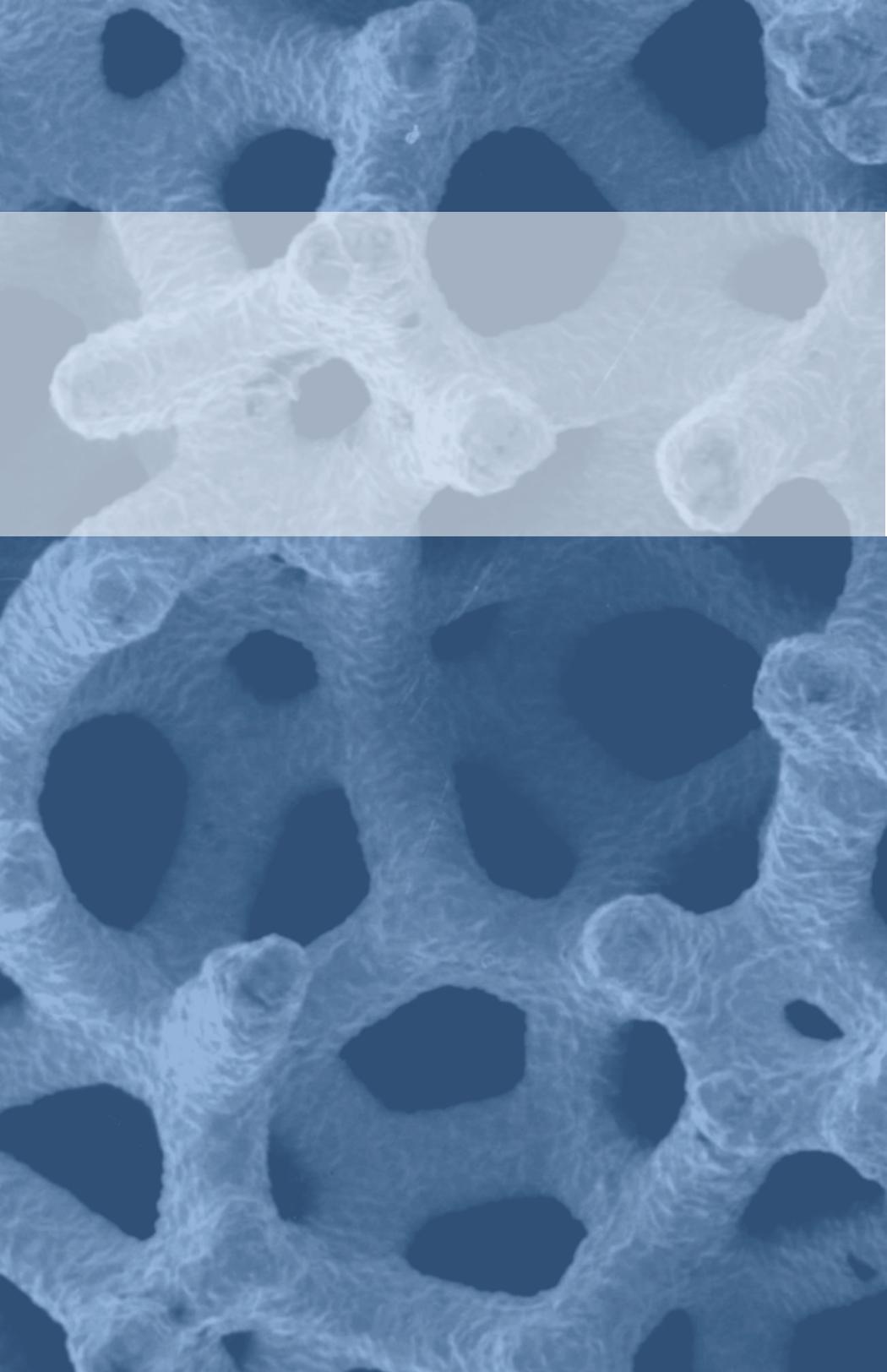
The 2010-2015 Roadmap to Florida’s Future

The Roadmap to Florida’s Future is the official statewide strategic plan for economic development.

Developed through broad stakeholder outreach and partnership among the state’s business and economic development leaders, the Roadmap provides a long-term vision for Florida’s economy and is supported by six strategic priorities and 24 sets of policy and business development recommendations.

2010-2015 STATE ECONOMIC PRIORITIES





4

STRATEGIC PROJECTS, PROGRAMS AND ACTIVITIES

VITAL PROJECTS

Vital Projects address the region’s greatest needs to best enhance the region’s economic competitiveness. The East Central Florida Economic Development District has aligned the CEDS Vital Projects with the Six Pillars of the Florida Chamber Foundation.

Talent Supply & Education	Create, connect, and align education and workforce development programs and initiatives to grow and retain the region’s talent supply chain to meet employer needs.
Innovation & Economic Development	Grow innovative industry clusters such as advanced manufacturing, modeling and simulation, and life sciences, and enhance communications infrastructure to position the region for future economic prosperity.
Infrastructure and Growth Leadership	Improve connectivity of all transportation systems to integrate economic development, talent, infrastructure, partnerships, and other resources across East Central Florida.
Business Climate & Competitiveness	Expand opportunities for businesses to access capital throughout their life cycles, and reduce barriers to small business and entrepreneurial growth.
Civic & Governance Systems	Foster and strengthen regional partnerships to achieve the region’s economic and quality of life goals.
Quality of Life & Quality Places	Implement the East Central Florida 2060 Plan (Strategic Regional Policy Plan) to build and enhance vibrant, healthy communities that attract workers, businesses, residents, and visitors to the region.

The regional projects, programs, and activities intended to implement the Goals and Objectives of the CEDS can be found on Pages 50 - 59.

Pillar	Project	Description
Talent Supply and Education	East Central Florida Industry Cluster Analysis	Detailed analysis of East Central Florida’s economic structure, industry clusters, and their workforce.
	Kissimmee Gateway Airport’s Aerospace /Aviation School Partnership	This public-private partnership allows students access to the airport’s resources to further their learning experience, and inspire them to consider careers in the aerospace and aviation industries.
	Aerospace Industry Transition Program	This program includes targeted economic development activities, a specialized workforce curriculum, training tools, job counseling, employment agreements, and advocacy programs to help former aerospace workers transition into other careers.
	Lake Tech Center for Advanced Manufacturing	The Center for Advanced Manufacturing at Lake Tech will help to meet the region’s growing demand for skilled manufacturing technicians by preparing students in machining, welding, and other manufacturing processes.
Innovation & Economic Development	East Central Florida Broadband-Connecting the Region’s Health Care Resources	Explore the current accessibility of broadband and Wi-Fi in East Central Florida to better connect the region’s health care activity centers.
	Daytona Beach International Airport (DAB)	Infrastructure projects designed to facilitate growth at Embry-Riddle Aeronautical University’s Research Park, and to support catalytic aviation opportunities at DAB.
	Economic Gardening and Regional Incubator Projects	This initiative will promote the creation of new businesses and support high growth companies by providing lower cost office space, access to experienced entrepreneurs and angel investors, and other technical assistance

Partner Agencies	Mission 1	Mission 2	Mission 3	Potential Jobs Created	County/Regional	Potential Funding Sources
East Central Florida Regional Planning Council		2		TBD	Regional	U.S. EDA
Osceola County		2		TBD	Osceola County	City of Kissimmee, Kissimmee Gateway Airport
Workforce Boards		2		TBD	Brevard County	Workforce Boards, U.S. DOL U.S. EDA
Lake Tech		2		TBD	Regional	U.S. EDA, State of Florida, Lake
ECFRPC, Metro Orlando EDC, Brevard Workforce, Health Council of ECF, Space Coast Energy Consortium, Central Florida YMCA	1	2		TBD	Regional	U.S. EDA
Volusia County and City of Daytona Beach	1			TBD	Volusia County	U.S. EDA
UCF, State of Florida, U.S. EDA, Local Governments		2		500-1,000	Regional	U.S. EDA

Pillar	Project	Description
Innovation & Economic Development	Florida Unmanned Aerial Vehicles/ Unmanned Autonomous Systems Test Range	To establish a statewide testing range for the development of Unmanned Aerial Vehicles (UAV) and Unmanned Autonomous Systems (UAS). This standardized infrastructure would support application, commercialization and R&D for various agencies, universities and businesses.
	On-Site Production of Hydrogen at Kennedy Space Center	Currently liquid hydrogen is trucked from Louisiana. Between transport and transfer 50% the fuel is lost. There are new technologies for smaller plants that make it possible to produce hydrogen on or immediately adjacent to the Kennedy Space Center.
	East Central Florida Fabrication Lab	This is a facility designed to provide open access to a wide variety of machines and tools used for designing and building almost any product out of metal, plastic, wood, fabric, and electronic components. Fabrication lab members share equipment like laser cutters and three-dimensional printers, which would be too costly to rent or buy individually. This helps to lower the costs of building invention prototypes and increase innovation.
	International Speedway Boulevard (ISB) Corridor	A public private partnership focused on the development of sustainable community infrastructure that promotes economic development along the ISB corridor in Daytona Beach.
	SunRail DeLand Station	Support development of the Phase Two SunRail station planned for DeLand, Florida.
	High Efficiency Turbine Research	Develop and demonstrate more efficient technologies for the next generation of turbines, combining space program skills and engineering with local firms and research institutes to provide new insight and support for technological development

Partner Agencies	Mission 1	Mission 2	Mission 3	Potential Jobs Created	County/Regional	Potential Funding Sources
Space Florida/Advanced Aerospace Platform Applications Center (AAPAC)	1	2		200-500	Regional	U.S. EDA
Space Florida and Space Coast Energy Consortium	1			25-40	Brevard County	U.S. DOE
Space Florida and Craig Technologies		2	3	25-50	Regional	U.S. EDA
City of Daytona Beach and NASCAR	1		3	TBD	Volusia County	Private Funding
Volusia County, City of Deland, ECFRPC, and FDOT			3	TBD	Volusia County	FDOT
UCF Center for Advanced Turbine Efficiency Research, Florida Energy Systems Consortium, Space Coast Energy Consortium. Society of Manufacturing Engineers	1	2		25-40	Regional	U.S. EDA and U.S. DOE

Pillar	Project	Description
	Florida Advanced Manufacturing Research Center	To establish a state-of-the-art research and incubation facility focused on the next generation of universal smart sensors. The center will be the home of research aimed at advancing technologies that will shape the future of automobiles, surgical devices, home appliances and a host of other devices.
Infrastructure & Growth Leadership	International Space Life Sciences Flight Hub	To further exploit the success of Florida in securing the management of the National Lab component of the International Space Station. Will require focused improvements at the Space Life Sciences Lab at KSC as well as expansion of the opportunities at Exploration Park.
	Multi-Use Aerospace Test Bed & Unmanned Aerial System Operational	Create a Central Florida based rapid takeoff and landing airspace channel, including the Shuttle Landing Facility at Kennedy Space Center, with standardized instrumentation and facilities located at multiple points for appropriate NASA, DOD and commercial spaceport and aerospace activities, including R&D. The purpose is to test various sensors and the calibration of airspace technologies.
	Biofuels/Biomass - Processing Facility/Refinery	Develop a biofuel refinery facility in Central Florida that could provide truly renewable biologically-derived aviation, rocket and other fuels to support the next generation of space exploration as well as terrestrial transportation needs. There is also a long-term need to construct places to store the fuel stacks that protect the feed stock from humidity.
	Inland Port and Advanced Manufacturing	Develop an inland port and advanced manufacturing hub in Titusville to serve the Space Coast area.
	Florida Energy and Aerospace Technology Park	Develop a Technology Park on 3,300 acres owned by the City of Leesburg at the intersection of County Road 470 and Florida's Turnpike. Leesburg plans to construct and operate within the Technology Park a business "innovation lab" that will expedite start-up companies capable of creating and delivering new products and services to the aerospace and energy markets.
	U.S. 192 Bus Rapid Transit/Internal Transit Circulator	Provide BRT to connect Downtown Kissimmee's proposed Multimodal Center, which will house the future SunRail stop. The BRT compliments regional people mover systems.

Partner Agencies	Mission 1	Mission 2	Mission 3	Potential Jobs Created	County/Regional	Potential Funding Sources
Space Florida		2		250	Regional	U.S. EDA
Space Florida / Advanced Aerospace Platform Applications Center (AAPAC)	1	2		350	Regional	U.S. EDA
Space Florida, Space Coast Energy Consortium, Port Canaveral, NASA-KSC, USAF 45th Space Wing, Major Regional Land Owners, U.S. DA.	1	2		70-100	Brevard County	U.S. EDA
City of Leesburg, Embry-Riddle Aeronautical University, UCF's Center for Advanced Turbines and Energy Research (CATER)	1			3,000	Brevard County	FDOT and TIGER Grant
City of Leesburg	1			500	Lake County	U.S. EDA
Osceola County, City of Kissimmee			3	TBD	Osceola County	LYNX

Pillar	Project	Description
Infrastructure & Growth Leadership	Osceola Parkway Extension into Lake Nona/Medical City	Extending Osceola Parkway would provide a much needed transportation access point to Medical City.
	Extending Natural Gas Pipeline to Spaceport Commerce Park	There is an identified need to extend the natural gas pipeline to the north side of the Spaceport Commerce Park (south Titusville), but due to the distance of the extension has increased the project's costs..
	North Side Cargo Backup Area	This project will include all work necessary to facilitate the backup area, ramps, and container staging areas that enhance the transfer of cargo utilized by the new cargo piers and facilities on the North side of the Port. Work would also include relocation of berths as necessary and the addition of transfer cranes as required.
	Port Canaveral Drawbridge	Build second egress bridges on SR 401 to connect Port Canaveral, NASA, KSC and Patrick's Air Force Base.
	Multi Fuel Station	Developing 3-4 single source fueling stations for new or enhanced fuels, such natural gas, hydrogen, bio-diesel, E-85, and others.
	Lake Nona Technology Innovation Center (TIC)	Create a Technology Innovation Center (TIC) in Lake Nona to establish the core competency to develop these "gigabit-native" applications. The TIC will work with partners in the Lake Nona greenfield (10k homes, 2 hospitals, 2 research facilities, medical school, office and commercial space) to deploy and assess effectiveness of these "gigabit-native" solutions.
	Commercial Space Port	An initiative that supports and encourages the efforts of the State of Florida, through its agent, Space Florida, to develop commercial space launch facilities in approximate locations north of the current Kennedy Space Center complex after conducting environmental surveys to ensure that the pristine environmental conditions of the area are duly preserved.

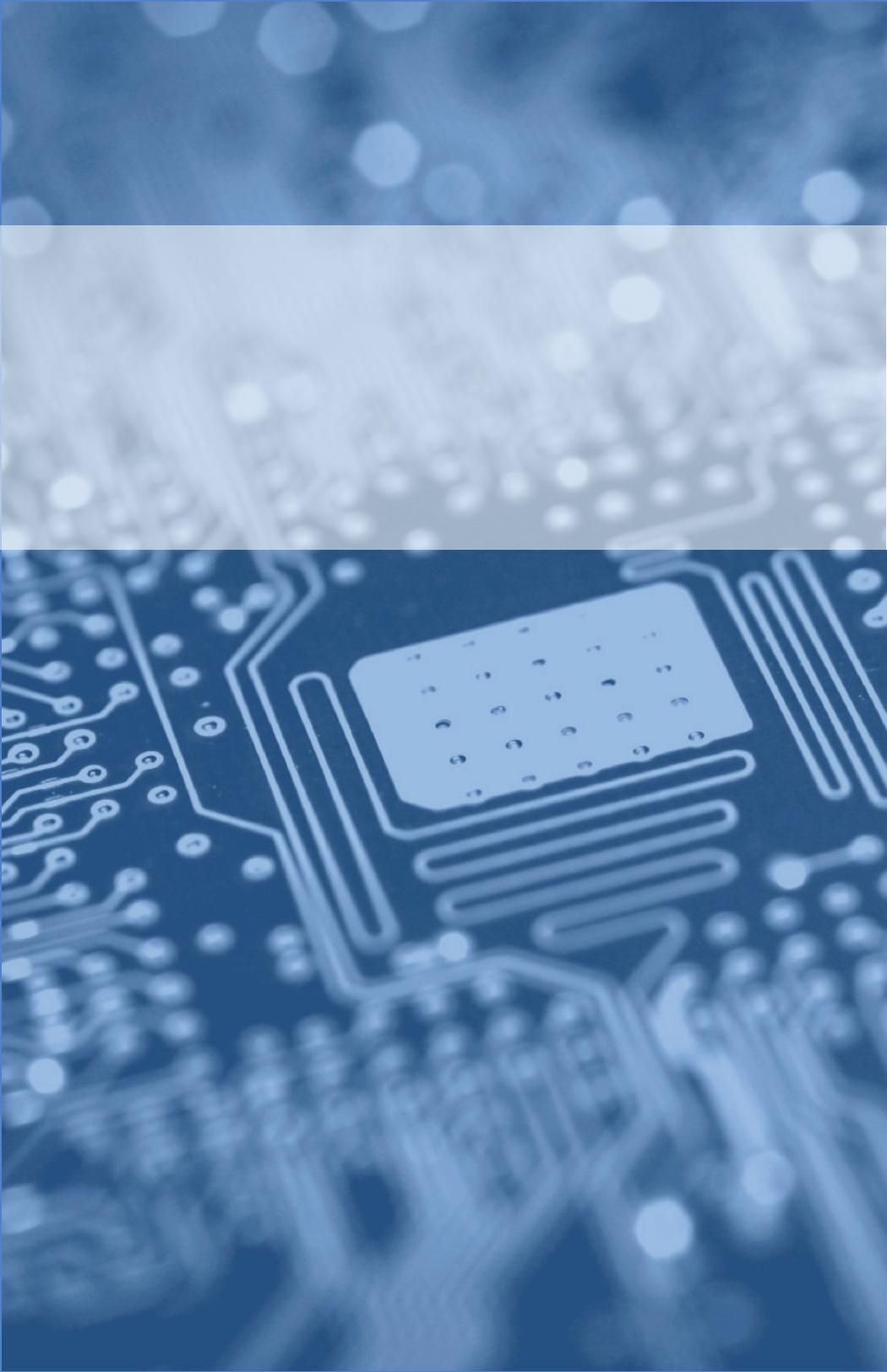
Partner Agencies	Mission 1	Mission 2	Mission 3	Potential Jobs Created	County/Regional	Potential Funding Sources
Osceola County			3	TBD	Osceola County	FDOT
Space Coast Energy Consortium, City of Titusville, North Brevard Economic Development Zone, TICO Airport Authority	1			TBD	Brevard County	U.S. EDA
FDOT	1			TBD	Brevard County	FDOT and Brevard County
FDOT and Brevard County	1			105	Port Canaveral	FDOT
Space Coast Energy Constortium and Brevard County	1			TBD	Brevard County/Regional	U.S. DOE
Lake Nona Institute, U.S. Ignite, Orlando International Airport, City of Orlando, Ciso, GE	1	2	3	150-200	Regional	U.S. EDA, Lake Nona, Private Sector
Space Florida	1	2		TBD	Brevard County/Volusia County	U.S. EDA

Pillar	Project	Description
Business Climate & Competitiveness	Community Development Energy Efficiency Finance Programs	Develop and implement a multi-million loan program to support energy efficiency improvements in residential and non-residential properties.
	Alternate Fuel Vehicle and Refueling/Charging Infrastructure Loan Program	Develop and implement supplemental lending programs to support development of alternate fuel vehicle refueling and/or charging infrastructure throughout the East Central Florida region. These programs would help provide a “backbone” infrastructure to support the rollout of alternative fueled (or electric) vehicle fleets in the region.
Civic & Governance Systems	Smart (Library) Zones	Re-brand the library system to transform libraries into innovation and collaboration centers that promote lifelong learning center for Lake County’s workforce.
	Spaceport Infrastructure Refurbishment for Commercial Operations	This would enable the leveraging of federal funds against FDOT matching requirements to further enhance Florida’s ability to attract various commercial space developments.
	Center for the Advancement of Science in Space/ISS National Laboratory	An entity recently chosen to administer the International Space Station National Lab, identifying, encouraging and supporting research projects that advance scientific understanding while taking advantage of the unique location and capabilities of the International Space Station. While supported through a NASA contract, the Center could also provide significant opportunities for additional energy-related science.
	Superconductivity & Cryogenics Research Alliance	Build upon existing regional and statewide assets with a strong impact and involvement in the field of superconductivity and advanced magnets to help the alliance develop a world-leading research center on related cryogenic applications.

Partner Agencies	Mission 1	Mission 2	Mission 3	Potential Jobs Created	County/Regional	Potential Funding Sources
Local governments, Space Coast Energy Consortium, local banks and credit unions, CDFIs, and economic development agencies	1	2		900-1200	Regional	U.S. EDA
Local Governments	1			20-40	Regional	U.S. EDA and DOE
County Library Systems		2		TBD	Regional	U.S. EDA, and Private Funding
Space Florida	1			100	Brevard County	U.S. EDA
Space Florida	1	2		15-20	Brevard County	U.S. EDA
Space Coast Energy Consortium, National High Magnetic Field Lab, Center for Advanced Power Systems, Florida Energy Systems Consortium, NASA-KSC, Advanced Magnet Lab	1	2		10	Brevard County	Private Fundng

Pillar	Project	Description
Quality of Life and Quality Places	Creative Village	The Creative Village project is located in a minority neighborhood in the core of downtown Orlando. Through three years of public meetings, the Creative Village Concept Team developed a vision for the redevelopment of this site as a sustainable, mixed-use, transit oriented development based on educational technology, digital media education.
	Interstate 4 /State Road 472 Activity Center	This development of regional impact is envisioned to become one of the major centers in the urban network of Central Florida and one of the principal employment centers in Volusia County.
	Lake Nona Medical City	Support the emerging life science cluster in the Lake Nona area currently comprised of the Sanford-Burnham Institute, the UCF College of Medicine, and the Nemours and Veteran hospitals. To complement these institutions, the area would benefit from building “wet labs” and biotechnology incubators.
	East Central Florida Regional Multi-Use Trails Network	Create a world-class multi-use greenways and trails network serving the East Central Florida area by eliminating alignment gaps that prevent the connection of current corridors and building new trail segments like the East Central Regional Trail between Brevard and Volusia counties and the Coast-to Coast Connector.

Partner Agencies	Mission 1	Mission 2	Mission 3	Potential Jobs Created	County/Regional	Potential Funding Sources
City of Orlando	1	2	3	8,000	City of Orlando	City of Orlando, U.S. HUD Grant, FDOT, TIGER Grant
Volusia County			3	TBD	Volusia County	Local Governments
City of Orlando			3	25,000	Regional	City of Orlando, Tavistock Group
FDOT, FDEP, and Florida Greenways & Trails Foundation, Inc.			3	TBD	Regional	U.S. DOT, FDOT



5

ANALYSIS OF ECONOMIC DEVELOPMENT PROBLEMS AND OPPORTUNITIES

SHIFT-SHARE ANALYSIS 2010

The changes in employment and unemployment numbers are one way of monitoring the current status of the economy. Using the Shift-Share Analysis technique, we can subdivide the reasons behind changes in employment into three components: National Growth Component, Industrial Mix Component and the Competitive Component.

- The National Growth Components represents the change in the area's employment due to the growth or contraction of the United States economy.
- The Industrial Mix Component represents the change in the area's employment that is due to unique reasons related to the industry itself.
- The Competitive Component represents the change in the area's employment that is due to the total change in the competitiveness of the region.

The table below shows changes in employment for select industries in the East Central Florida EDD between 2006 and 2011. The EDD is comprised of Brevard, Lake, Orange, Osceola, Seminole and Volusia Counties.

Table 16: East Central Florida Shift-Share Analysis 2011

Economic Development District (EDD)	National Component	Industrial Component	Competitive Component	Total Employment Change	2010 Total Employment	Percentage Change in Employment
Forestry, Fishing, Other	76	-1,189	-1,876	-2,989	3,359	-88.98%
Mining	18	405	362	785	2,314	33.92%
Utilities	51	-123	-1,357	-1,429	2,842	-50.28%
Construction	1,634	-25,101	-16,532	-39,999	95,833	-41.74%
Manufacturing	897	-9,195	16,023	7,725	82,367	9.38%
Wholesale Trade	678	-4,813	-866	-5,001	61,025	-8.20%
Retail Trade	2,471	-16,997	2,863	-11,663	193,903	-6.01%
Transportation, Warehousing	467	1,741	5,437	7,645	46,500	16.44%
Information	423	-3,805	2,210	-1,172	34,704	-3.38%
Finance, Insurance	748	8,938	3,145	12,831	75,072	17.09%
Real Estate, Rental, Leasing	949	13,467	-3,710	10,706	89,651	11.94%
Profess, Tech Services	1,327	14,486	648	16,461	126,867	12.98%
Mngmt of Co, Enter	163	1,879	1,882	3,924	17,464	22.47%
Admin, Waste Services	2,101	-10,869	-5,635	-14,403	160,324	-8.98%
Educational Services	332	4,217	3,450	7,999	35,617	22.46%
Health Care, Social Asst	1,885	8,494	9,061	19,440	176,242	11.03%
Arts, Entertainment, Rec	1,024	4,931	-2,851	3,104	88,305	3.52%
Accom, Food Services	2,121	-3,359	-1,459	-2,697	173,767	-1.55%
Other Services (excl Gov)	1,078	1,078	7,786	9,942	99,645	9.98%

For example, the Construction industry lost 39,999 jobs during this period. Forty-two percent of that change (16,532 jobs) occurred because of regional conditions, which included the collapse of Florida’s construction boom. With the housing recession, credit crunch and economic crisis the United States and specifically Florida faces, the construction industry could continue to lose jobs in the short-term.



Figure 28: Nemours Children’s Hospital is an important part of the Lake Nona Medical City development in Orlando, which also includes the Sanford-Burnham Medical Research Institute, the University of Florida’s Academic and Research Center, the UCF Medical School,, and the Orlando VA Medical Center. Source: Brian H Melton

The addition of 19,440 jobs in the Health Care and Social Assistance sectors can be attributed to the competitive and industrial components. The region’s unique attributes attracted demand for health care and social assistance services. This led to the creation of 9,061 health care and social assistance jobs (1,885 + 8,494, national and industrial components). According to the 2010 Census, there are 5,079,161 people ages 47 to 64 in the State of Florida, making up 27 percent of the total state population. The demand for health care and social assistance services will continue to increase with the large aging baby boomer population located within East Central Florida.

By contrast, the 3,104 jobs added in the Arts, Entertainment, and Recreation sector can be attributed more to the national and industrial trends rather than what the region was or was not offering in relation to that industry. In fact, the region lost 2,851 jobs between 2006 and 2011 in this industry due to competition.

A recent study by the United Arts Commission, “Arts & Economic Prosperity III: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in the Central Florida Region”, indicates that the impact from the arts on the regional economy (this study included the 6 counties of East Central Florida and Polk County) was:

- Total Industry Expenditures: \$165,312,100
- Full-Time Equivalent (FTE) Jobs Supported: 5,661
- Revenue Generated to Local Government: \$8,966,000
- Event-Related Spending by Arts and Culture Audiences: \$87.68 million (excluding the cost of admission)

Source: United Arts of Central Florida, Report to the Community 2010.



Figure 29: United Arts of Central Florida

Economic Cluster Analysis

Industries can be defined either as Local or Traded, depending on the type of market they serve. Local industries produce most of their products and services for local consumption. Traded industries produce goods and services that are mainly exported outside the region. Traded industries can create more wealth for local economies from their export activities and their ability to bring in outside money. Location Quotients and the percentage of regional share of national employment ratios can be used to analyze local and traded industries .

Location Quotients (LQs) help to measure the industry employment concentrations that operate in the region. The LQ is a ratio that compares the region's employment in a certain industry against national employment in that industry. If the industry's LQ is higher than 1, then the region has a higher concentration of employment in that particular industry than the rest of the nation. The assumption is that the extra capacity is used to produce goods and services to export. This can be a signal of regional strength in that particular industry. On the other hand, if the LQ is less than 1, the local industry has lower employment than the national rate. This means that the region is producing less good and services than needed to satisfy local demand, which means that these products would need to be imported.

Figures 30 and 31 show local and traded industries compared to the basis of their respective total employment (bubble size), and their LQ in 2010 as well as the change in percentage of the regional share of national employment of the industries.

The top right quadrant (LQs over 1 and growing regional share of national employment) represents East Central Florida's economic Strengths. The lower right quadrant (LQs lower than 1 and growing regional share) represents regional Opportunities. The top left quadrant (LQs over 1 but dropping regional share of national employment) shows sectors where the region is losing market share, but still enjoys higher than national average employment. These are the Threats to the region. Finally, the lower left quadrant (with LQ less than 1 and dropping regional share of national employment) shows Weaknesses of the region.

Traded Industries

The Location Quotient analyses displayed in Figures 30 and 31 provide a snapshot of the performance of select industries in the region compared to the nation. Based on this Location Quotient analysis, the Region's industry strength's by sector and number of employees are highlighted in Table 17. The strongest industry in the region is Amusement, Gambling, and Recreation with a Location Quotient of 3.44 and 65,134 employees. The second strongest sector is Accommodation with a LQ of 2.51 and 49,724 jobs. These are indicators of East Central Florida's economic specialization in the Leisure and Hospitality industry. The strength of the local tourism sector is due to the presence of world class theme parks (Disney, Universal, and Sea World) and the Orange County Convention Center, the second largest in the nation. The local tourism industry has reached maturity, but even with rising competition from other regions and countries, East Central Florida continues to be a leader in this sector.

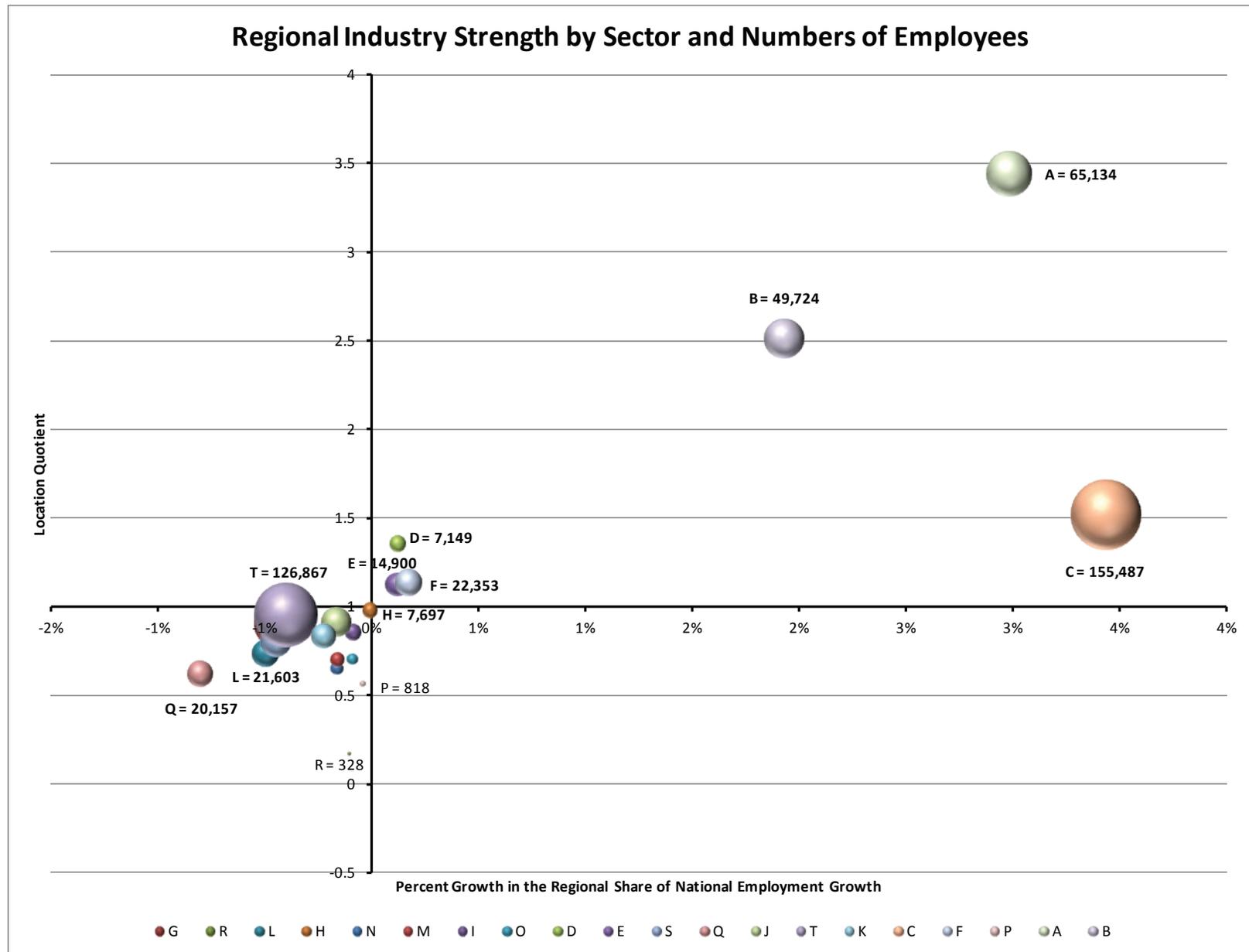


Figure 30: 2011 Location Quotient

Location Quotient is a ratio of the region’s employment in a certain industry to the total employment in the region, divided by the national employment in that industry to the total national employment.

Table 17: Regional Industry Sectors

A	Amusement, Gambling, Recreation
B	Accommodation
C	Administrative and Support Services
D	Internet publishing and broadcasting; ISPs, search portals, and data processing; Other information services
E	Broadcasting, except Internet; Telecommunications
F	Performing arts and spectator sports
G	Wholesale Trade
H	Transit and Ground Passenger Transportation
I	Publishing Industries, Except Internet
J	Insurance Carriers and Related Activities
K	Management of Companies and Enterprises
L	Truck Transportation; Couriers and Messengers
M	Warehousing and Storage
N	Scenic and Sightseeing Transportation; Support Activities
O	Motion Picture, Video, and Sound Recording Industries
P	Museums, Historical Sites, Zoos, and Parks
Q	Securities, Commodity Contracts, Investments
R	Rail Transportation
S	Monetary authorities - central bank; Credit intermediation and related activities; Funds, trusts, & other financial vehicles
T	Professional and Technical Services

On the other hand, the Rail Transportation industry has a very low LQ (0.17) and employs only 328 people. There is little passenger rail currently in the region, so the expectation is that most of the employment is related to freight . However, this will likely change because of SunRail, the region’s Commuter Rail system. SunRail is expected to contribute to a regional rail resurgence in the coming years.

The East Central Florida Economic Development District’s economy has been experiencing expansion into new sectors, allowing the region to diversify. Diversification is key to the success of the regional economy. East Central Florida must focus on new and emerging technologies, garnering high wage jobs, importing capital and exporting goods and services.

LOCAL INDUSTRIES

Figure 30 shows select local industries. These industries mostly supply local markets with consumer goods and services. In East Central Florida local industries are also affected by tourists who drive up the demand on many commodities and services produced by these industries.

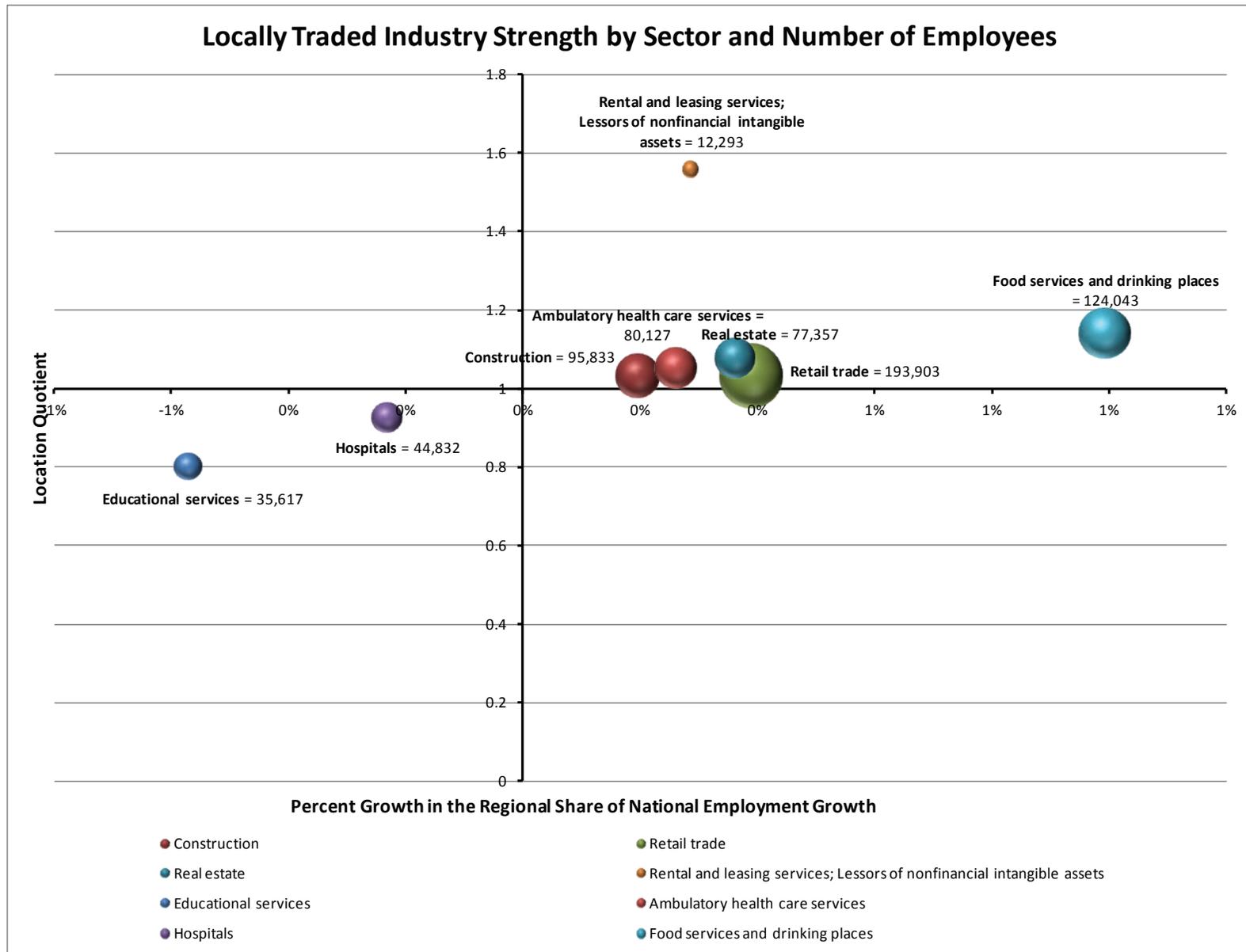


Figure 31: 2011 Locally Traded Industry Location Quotient

The Educational Services industry employed 35,617 people in 2011 and has lost employment in recent years as its regional market share declined by 57%. The region continues to have lower employment in this industry than the national average (LQ of 0.80). The Educational Services industry needs support in order to better compete on a national level.

Education is one of the most important industries for the regional economy. It directly affects regional economic development today and into the future. Companies seeking to relocate or expand into the area want access to a well-educated workforce and a higher educational system that is prosperous in research and development. Without a proper education system, the workforce will be at a disadvantage in competing for jobs in the knowledge-based economy.

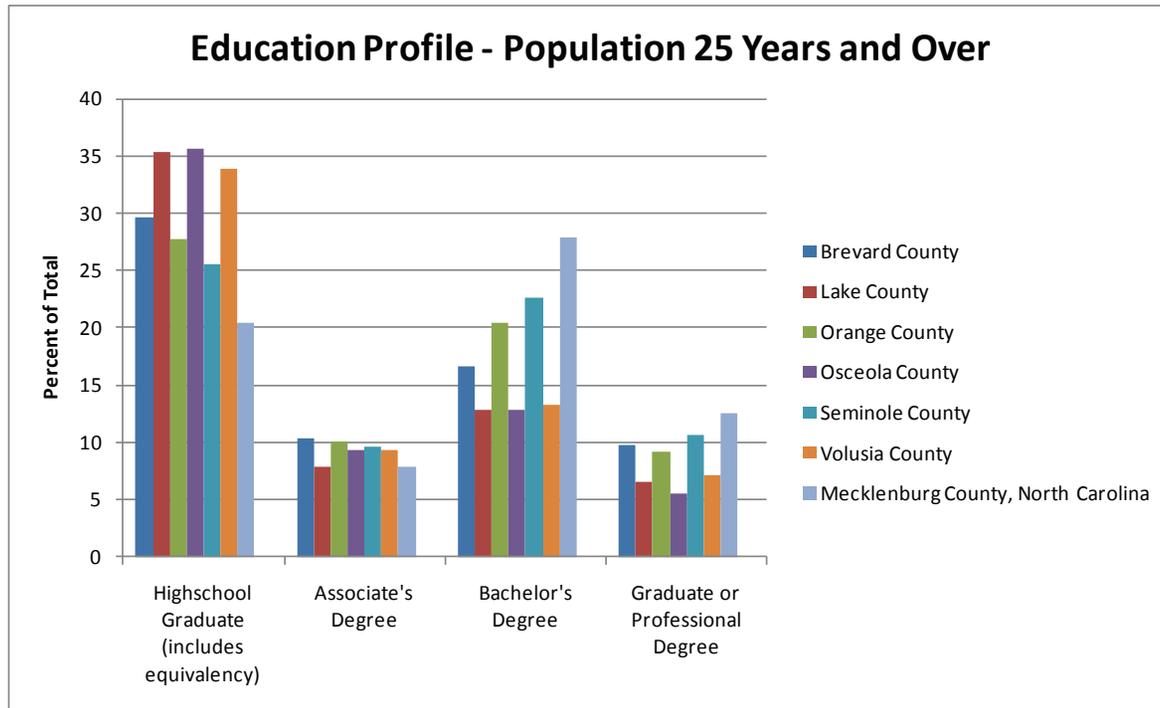


Figure 32: Education Profile (Source: 2005-2009 American Community Survey 5-Year Estimates)

The Location Quotient analyses displayed in Figures 29 and 30 provide a snapshot of the performance of select industries in the region compared to the nation. This is one way to identify regional strengths, weaknesses, opportunities, and threats by highlighting which sectors of the economy are concentrated. The East Central Florida Economic Development District's economy has been experiencing expansion into new sectors, allowing the region to diversify. Diversification is key to the success of the regional economy. East Central Florida must look beyond the real estate and construction sector to focus on new and emerging technologies, garnering high wage jobs, importing capital and exporting goods and services.

STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS TO THE REGIONAL ECONOMY

To understand the dynamics of the regional economy, it is vital to know the key strengths and weaknesses that make this economy what it is today, and identify the potential opportunities and threats facing the region.

Issues such as traffic congestion, transportation access, cost of living, environmental quality, labor access, access to capital and educational attainment can significantly influence regional economic growth.

The CEDS Strategy Committee completed a strengths, weaknesses, opportunities and threats (SWOT) exercise at the CEDS kick-off meeting on March 7, 2011. The Strategy Committee brainstormed to identify regional strengths, weaknesses, opportunities and threats. ECFRPC staff compiled the feedback and created a survey to be prioritized by Strategy Committee members.

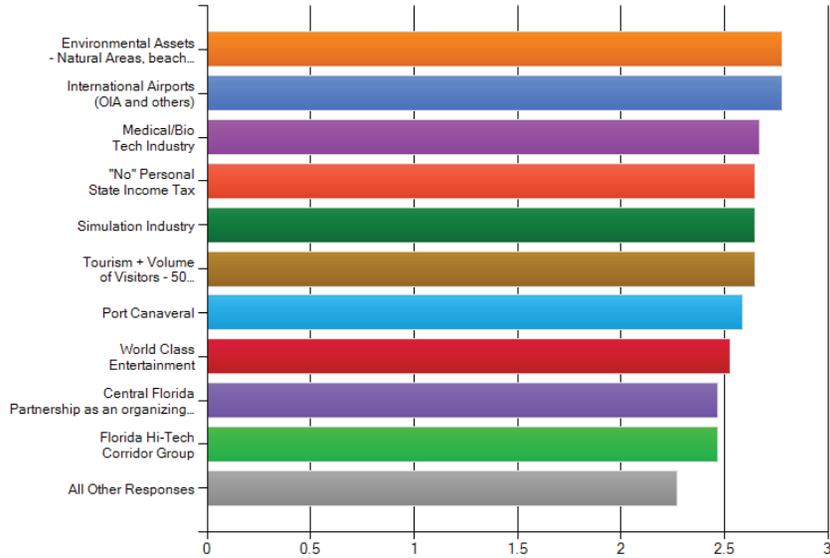
The Strategy Committee completed the online survey, asking them to rank the strengths, weaknesses, opportunities and threats based on priority (high, medium and low). Eighteen CEDS Committee members completed the survey. The top identified regional strengths were environmental beach assets and International Airports (OIA and others). The number one weakness is infrastructure (inadequate) with surface transportation system failing as a close second. Clean energy technology is the regional opportunity and a declining tax base is the highest priority threat.



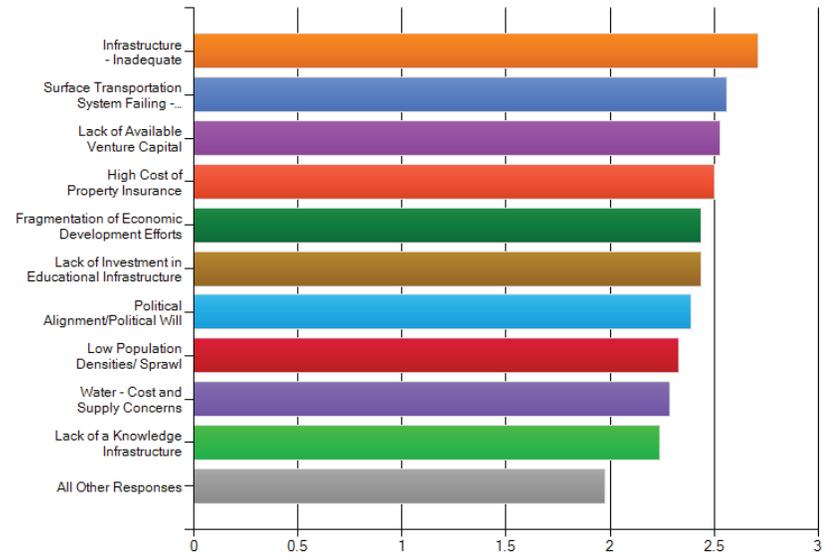
Figure 33 and 34: CEDS Strategy Committee Kick-Off Meeting

REGIONAL SWOT SURVEY RESULTS

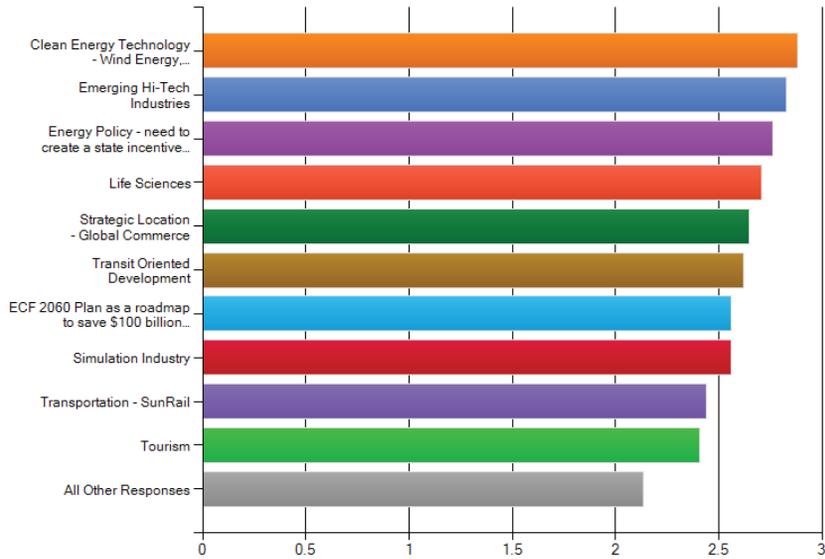
STRENGTHS: Please rank the following regional strengths (High, Medium, and Low with High being most important)



WEAKNESSES: Please rank the following regional weaknesses (High, Medium, and Low with High being most important)



OPPORTUNITIES: Please rank the following regional opportunities (High, Medium, and Low with High being most important)



THREATS: Please rank the following regional threats (High, Medium, and Low with High being most important)

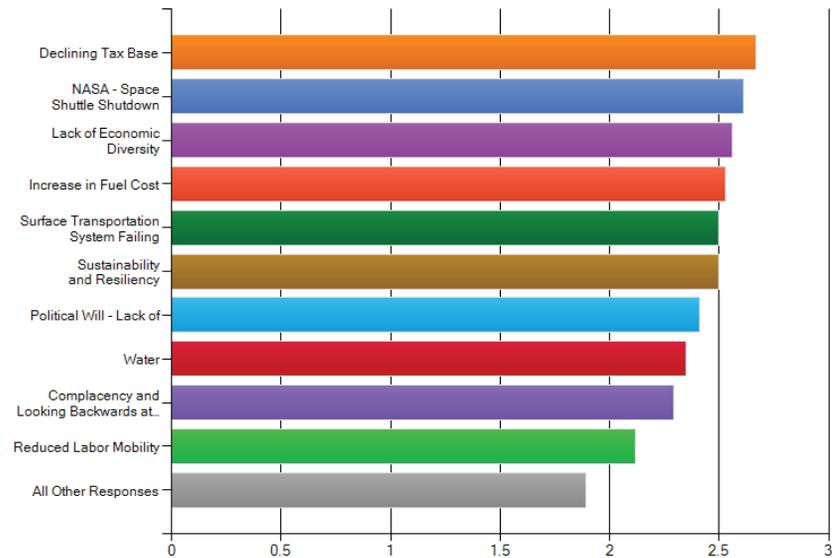


Figure 35: Regional SWOT Survey Results

Unprecedented challenges require innovative solutions for creating jobs and promoting regional prosperity. As a region, we must move from competition to collaboration.

WHAT IS A REGIONAL INNOVATION CLUSTER?

“Regional Innovation Clusters (RIC) are a geographically-bounded, active network of similar, synergistic or complementary organizations which leverage their region’s unique competitive strengths to create jobs and broader prosperity” (U.S. Department of Commerce, Economic Development Administration).

WHY DO RICS MATTER?

- They create a transition from unemployment or underemployment to high-skill jobs.
- On average, jobs within clusters pay higher wages.
- Regional industries based on inherent place-based advantages are less susceptible to off-shoring.
- They create many new opportunities for American workers.
- They connect disenfranchised communities to new career and educational opportunities.
- They stabilize communities by re-purposing idle manufacturing assets, engaging underutilized human capital, and contributing to improvements in the quality of life.

(Source: U.S. Department of Commerce, Economic Development Administration)



Figure 36: Florida's Aviation and Aerospace Cluster (Source: Enterprise Florida)

The East Central Florida Region strives to attract and develop the following existing and new clusters:

- Aerospace and Defense
- Agriculture
- Clean Tech and Energy
- Digital Media
- Financial Services and Investment
- Information Technology
- Life Sciences
- Maritime Industry and Transportation and Logistics
- Tourism

Impact of Space in East Central Florida

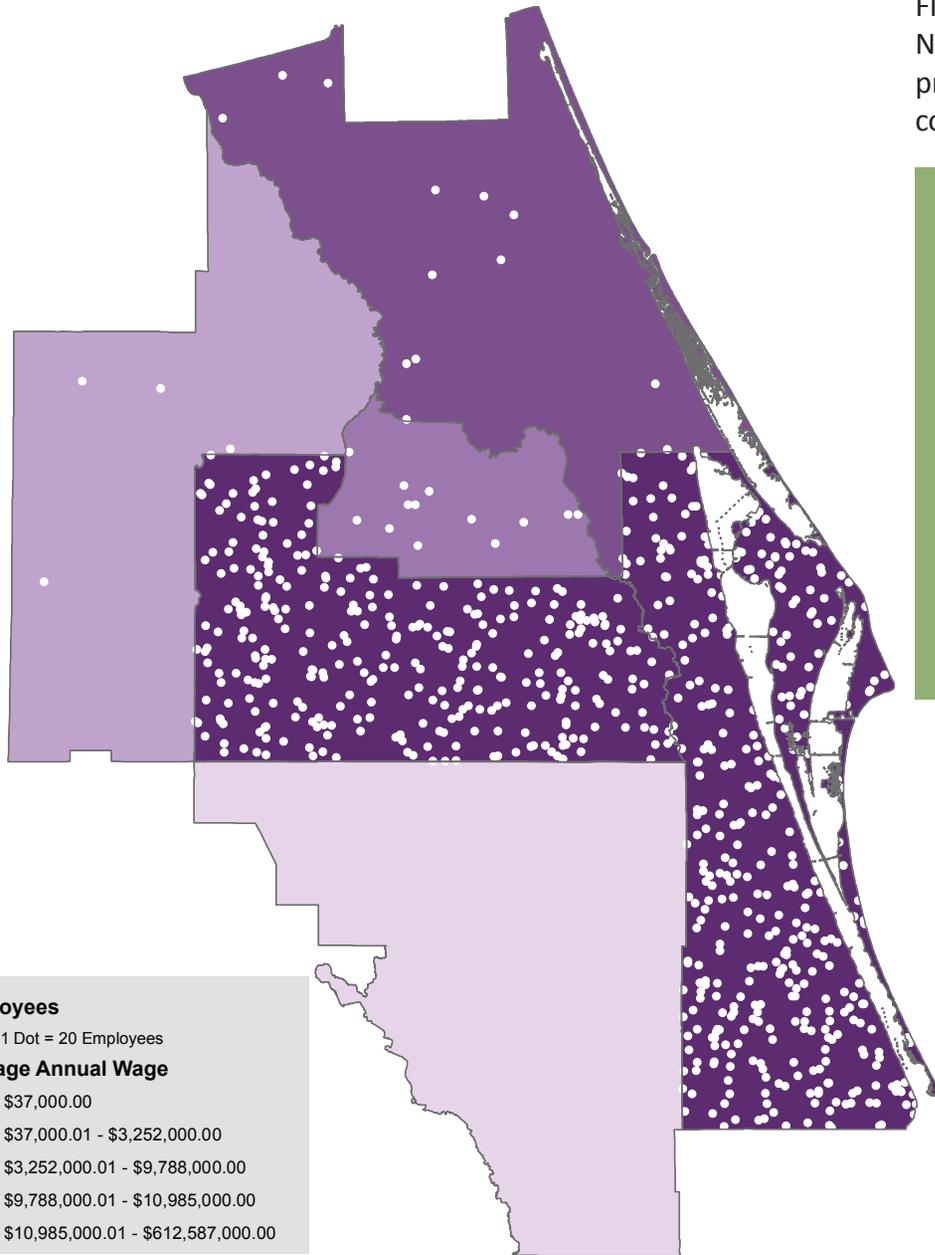
Florida is the #2 state in aviation, aerospace and space establishments. Nearly 2,000 companies employing some 84,000 industry professionals are located in the state. Virtually every major aerospace company and defense contractor has a Florida presence.

The data for the Impacts of Space in East Central Florida was provided by Space Florida. Space Florida is an Independent Special District of the State of Florida, created by Chapter 331, Part II, Florida Statutes, for the purposes of fostering the growth and development of a sustainable and world-leading space industry in Florida.

As the State of Florida’s aerospace economic development agency, Space Florida fosters bold economic development activities to expand and diversify domestic and international opportunities that support talent development, enhance infrastructure and support governments and organizations in improving the state’s competitive business climate.

The space industry workforce is chiefly concentrated in Brevard County, also known as “Florida’s Space Coast”. The culmination of the Space Shuttle Program poses significant economic challenges for Florida’s Space Coast region. However, the region is connected to a tremendous range of economic assets that can serve as the foundation for future business activity. Investing in Regional Innovation Clusters can promote a cohesive and reinforcing network of economic activity.

Several of the 9 clusters identified on page 73 offer tremendous opportunities to not only retain the Space Coast’s current workforce, but to accelerate the diversification of the regional economy. These industry clusters capitalize on the region’s powerful and unique economic assets. These clusters are Aviation and Aerospace, Clean Tech and Energy, Information Technology and Life Sciences.



Source of Data: Space Florida (BLS 2008)

Figure 37: Impact of Space in East Central Florida (Source: ECFRPC)

According to Enterprise Florida, Florida is ranked:

- 1st for flight training businesses
- 1st for support activities for air transportation
- 2nd for aerospace products and parts manufacturing
- 2nd for satellite telecommunication businesses
- 3rd for space research and technology businesses
- 3rd for aircraft manufacturing businesses
- 4th in aviation and aerospace employment
- 5th in total air cargo volume

The identified clusters listed above, present opportunities for the region to lead in the new “creative economy” and correspond with the goals of Enterprise Florida, the state’s economic development arm. The “creative economy” refers to the growth of technical, medical, professional and creative jobs. People with these portable skills can live or work anywhere they desire. They have been extensively studied by Dr. Richard Florida in his books “The Rise of the Creative Class” and “Cities and the Creative Class”. Dr. Florida has found that the Creative Class is attracted to urban centers with mixed commercial and residential uses in higher density cores. These urban centers typically have good mass transit systems such as light rail in Portland, Oregon and Charlotte, North Carolina and streetcars in San Francisco, California.

Some of the Region’s Clusters at a Glance

Life Sciences Cluster

Just off State Road 417, a five-minute drive east from Orlando International Airport, a 650-acre parcel of land is fast becoming a \$2 billion medical campus, including a medical school, research laboratories and hospitals. In 2006, East Central Florida leaders announced that firm commitments had been made to build a regional “Medical City” at Lake Nona, a large new development southeast of downtown Orlando. The site will be composed of four

major complexes clustered around a Town Center. Medical City will host two major hospitals: the Nemours Children’s Hospital, and the Orlando Veterans Affairs Medical Center. Complementing the two major hospitals are the UCF College of Medicine (opened Summer 2010) and the Burnham Institute for Medical Research (opened Fall 2009). These two facilities will train new medical professionals and have the potential to develop new medical advances. Accompanying the four major facilities will be a Town Center which will boast retail, residential, restaurants, office space and outpatient facilities to support the adjacent services.

It is anticipated that by 2017, the Medical City cluster will produce approximately: 16,200 jobs, \$5.2 billion in annual economic activity, \$1.5 billion in annual wages, and \$245.5 million in annual tax revenue (Sources: Florida Trend and Space Coast Business).



Figure 38: Lake Nona Aerial Construction of UCF College of Medicine (Source: UCF Today)

DIGITAL MEDIA CLUSTER

The digital media cluster in the region is steadily growing as the technology fueling the industry is cross applied to other established sectors in the region including:

- Modeling, simulation and training (MS&T)
- Film and television production
- Theme park/ride and show
- Interactive and immersive entertainment

Industry leaders predict that this cross application will lead to increased collaboration among these fields through shared research and technology breakthroughs.

Today, the region is positioned in the heart of one of the top 12 clusters for digital media in the country. With a focus on content creation and enabling technologies, the digital media sector features:

- 1,200+ companies
- 30,000 workers
- Annual revenue of an estimated \$9 billion (figure includes location-based entertainment).

Metro Orlando has the technical infrastructure, talented employee base and educational resources necessary to further the growth of digital media in this region. *(Source: Metro Orlando EDC)*

CLEAN TECH AND ENERGY CLUSTER

East Central Florida has established a traditional energy sector with the presence of worldwide industry leaders like Siemens Energy, Inc., General Electric, Honeywell, United Technologies and Mitsubishi Power Systems, as well as leading utility companies and a host of related service and equipment companies. This cluster also includes numerous emerging energy businesses around the space center and throughout Central Florida. Innovative small to mid-sized manufacturing firms that sprung up around the larger “anchor” institutions serving the space center, Patrick Air Force Base and the broader aerospace and defense industry cluster are now turning their time and talents toward clean energy technology commercialization.

Examples of this include the development of next-generation battery technologies by Planar Energy Devices, composite materials by Compsys, efficient lighting by Lighting Science Group, and waste-to-energy gasification systems from BME Green, Mainstream Engineering and Pratt & Whitney Rocketdyne.

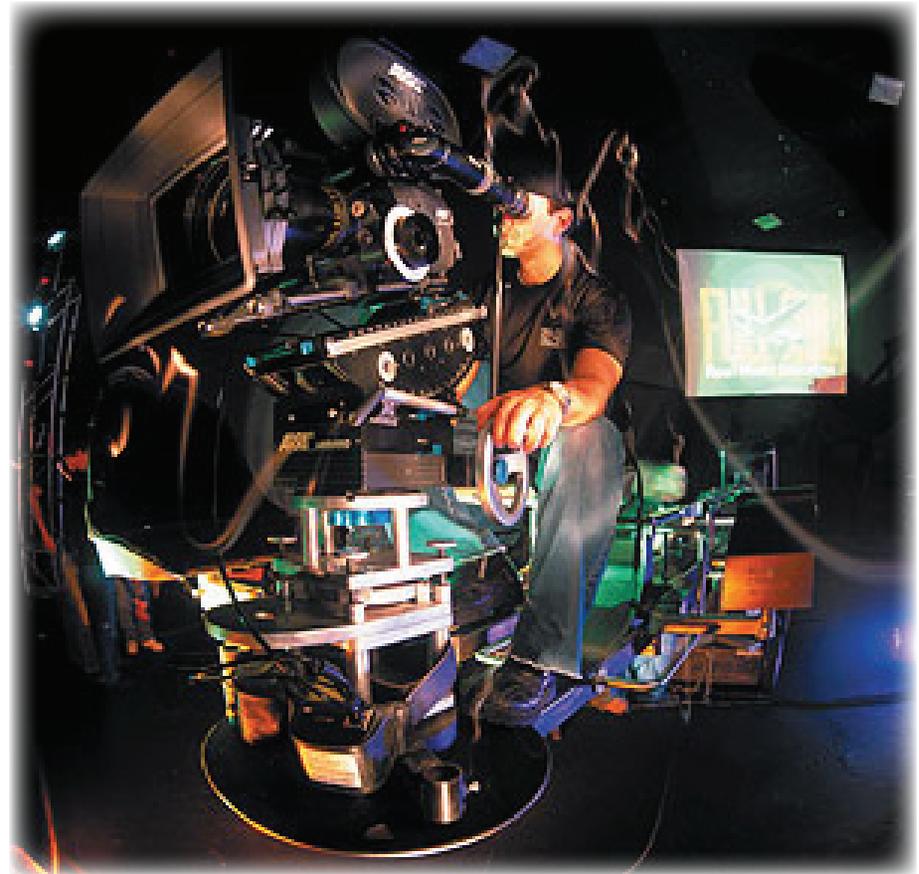


Figure 39: Two Arriflex 35mm Cameras at Full Sail University (Source: MovieMaker.com)

Accelerated expansion of this cluster through targeted support programs, services and capacity development will provide employment and economic benefits that will help mitigate dislocation caused by the end of the space shuttle program, and ensure a more sustainable and diverse regional economy.

(Source: Metro Orlando EDC, Space Coast Energy Consortium)

SIX PILLARS TECHNICAL REPORT

Please see Appendix B for East Central Florida’s data and analysis of economic development problems and opportunities filtered through the lens of the Six Pillars.

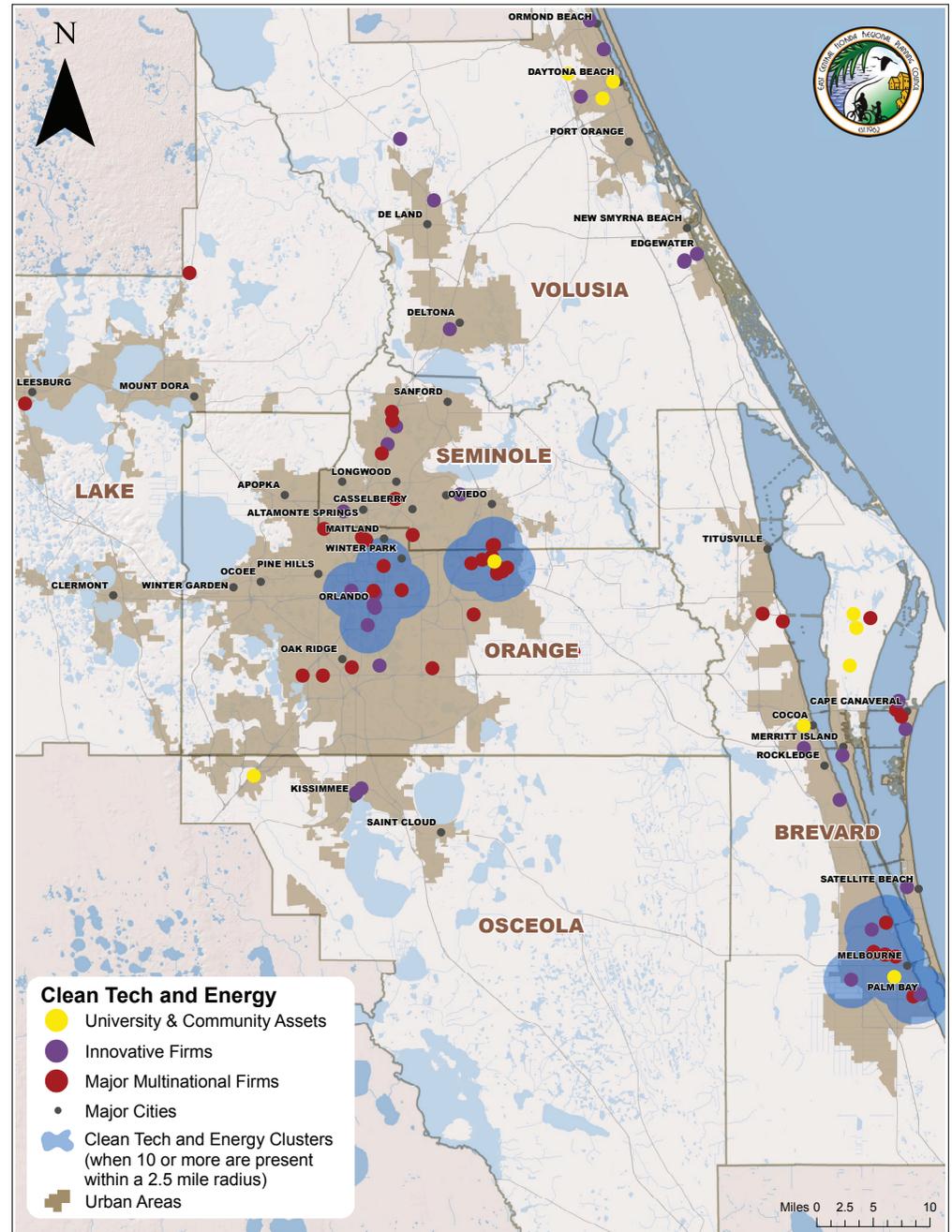


Figure 40: Regional Innovation Cluster, Clean Tech and Energy (Source: ECFRPC)



6

EMERGENCY PLANNING AND DISASTER STRATEGY

EMERGENCY PREPAREDNESS PROGRAM

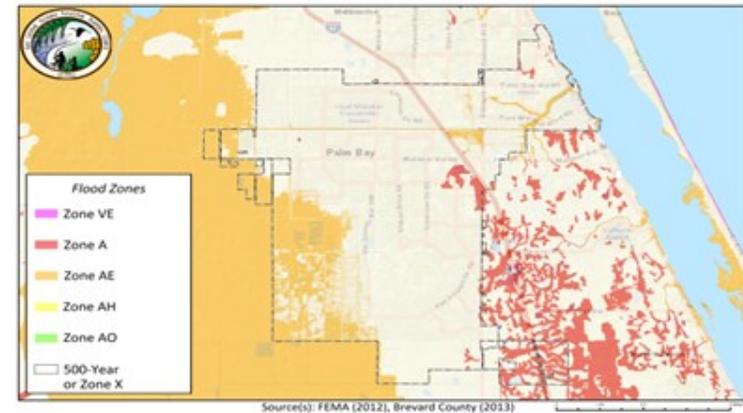
The East Central Florida Regional Planning Council's Emergency Preparedness Program provides emergency preparedness planning, training and exercise support to public safety agencies and the community throughout the six-county region. This support is provided through an all-hazards approach to emergency management. The all-hazards approach focuses on developing capacities and capabilities that are critical to preparedness, response and recovery for a full range of emergencies and disasters.

The East Central Florida Regional Planning Council (ECFRPC) assists local jurisdictions with developing and revising critical planning documents that support community resiliency to disasters. These include Local Mitigation Strategy reports, Post Disaster Redevelopment Plans, and Continuity of Operations Plans. In addition to these, the ECFRPC also host training sessions for first responders and disaster simulation exercises

Local Mitigation Strategy | Pre-Disaster

Natural hazards, such as hurricanes, floods and tornadoes are inevitable, and there is little that be done to control their force and intensity. These hazards must be considered to be legitimate and significant threats to human life, safety and property. Many areas of East Central Florida are vulnerable to a wide range of natural hazards, including hurricanes and tropical storms, flooding, tornadoes and wildfires. These hazards threaten the life and safety of residents, and have the potential to damage or destroy both public and private property and disrupt the local economy and overall quality of life of individuals who live, work and vacation in the community.

While the threat from hazardous events may never be fully eliminated, there is much that can be done to reduce the potential impact upon the community and citizens. By minimizing the impact of hazards upon our built environment, we can prevent such events from resulting in



disasters. The concept and practice of reducing risks from known hazards is generally referred to as hazard mitigation.

Local Mitigation Strategy | Pre-Disaster

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The Emergency Preparedness Program partners with the region's counties to develop and update the Local Mitigation Strategies (LMS). The LMS provides a methodological, substantive approach to mitigation planning.

The vulnerability assessment uses the best available data and technology to identify and evaluate potential hazard risks facing the community, as well as provide the factual basis for mitigation initiatives aimed to reduce risks. The vulnerability assessments completed by the ECFRPC identify and analyze known hazards that may threaten life and property across the entire planning area. The risk assessment describes each jurisdiction's vulnerability based on the number of buildings, infrastructure and critical facilities located in hazard areas as well as potential loss estimates for vulnerable structures. Data from Geographic Information Systems (GIS) and HAZUS data along with historical data from the National Climatic Data Center (NCDC) and the National Oceanic and Atmospheric Administration (NOAA) are used to analyze the vulnerability on jurisdictional basis and then are cross-referenced with a countywide parcel file that documents land use, financial information and specific building-related information in a consistent manner.

HAZUS is a nationally applicable standardized methodology that contains models for estimating potential losses from earthquakes, floods and hurricanes. It graphically illustrates the limits of identified high-risk locations allowing users to visualize the spatial relationships between populations.

PDRP | Post Disaster

Emergency management planning has traditionally focused on immediate response issues of public safety followed by restoring government operations. As has been demonstrated

through recent major disasters, local governments need to also take a proactive role in guiding community recovery by coordinating with the private sector to address business and economic recovery.

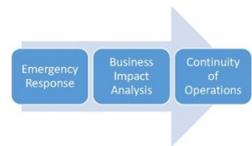
Key Elements of a PDRP include:

- *Business resumption and economic redevelopment*
- *Housing repair and reconstruction*
- *Infrastructure restoration and mitigation*
- *Short-term recovery actions that affect long-term redevelopment*
- *Sustainable land use*
- *Environmental restoration*
- *Financial considerations*
- *Other long-term recovery issues identified by the community*

The Emergency Preparedness Program through partnering with the Economic Development Program has compiled Post Disaster Redevelopment Plans for the coastal counties as well as inland counties. A Post-Disaster Redevelopment Plan (PDRP) identifies policies, operational strategies, and roles and responsibilities for implementation that will guide decisions that affect long-term recovery and redevelopment of the community after a disaster. The Post-Disaster Redevelopment Plans are action-oriented and outline a community-wide implementation approach developed through a comprehensive stakeholder group that represents county, municipal, non-profit, and private stakeholders and a flexible working group structure. Actions outlined in the plan are developed to be implemented as needed regardless of jurisdictional boundaries and possible staffing fluctuations in a post-disaster environment.

The purpose of the PDRP is to address disaster redevelopment issues with long-term implications. The plan helps to identify opportunities to partner and prepare with the community in the

event some future disaster requires long-term redevelopment efforts that stretches into the years following the disaster. In addition, there are many financial steps discussed that would not be funded from current collection levels and will require a separate community dialog about raising additional funding during the redevelopment period to pay for various suggested options. The goal of post-disaster redevelopment is not just to restore a community to its previous state, but to make smarter decisions that will increase resiliency to future hazards and disasters. The post-disaster environment is typically fast-paced and chaotic with competing interests vying for limited funds and resources. Recent incidents of national significance, such as hurricanes Irene (2011) and Katrina (2005), and the September 11 attacks illustrate this competition.



COOP | Post Disaster

When discussing disaster recovery and resilience, continuity of operations is a key component. A Continuity of Operations Plan (COOP) ensures the stability of an organization’s essential functions through a wide range of emergencies and disasters. The ECFRPC assists counties with their continuity planning process through plan development and training and exercise. COOP Plans identify an agency, government or department’s Mission Essential Functions (MEFs), which are those that must be continued throughout, or resumed rapidly after, a disruption of normal operations. These functions cannot be deferred during an emergency or disaster and include: succession to key positions; organizational communications (with a priority on emergency communications); leadership and management operations; situational awareness; personnel accountability; and alternative relocation sites.

● ● ●
A disaster may present a window of opportunity for strengthening communities and working toward disaster resilience.
 ● ● ●

Building Resiliency through First Responders Training

The ECFRPC’s Emergency Preparedness Program of the provides various education avenues to public safety agencies and the community. During the FY 2013-14 approximately 850 individuals were trained through the ECFRPC. This is achieved through the Hazardous Materials Emergency Planning (HMEP)/Local Emergency Planning Committee (LEPC) programs, as well as individual contracts with the local jurisdictions.



Ethanol Emergency Preparedness and Response to Transportation Emergencies Training

Hazardous Materials Emergency Planning (HMEP)/Local Emergency Planning Committee (LEPC)

Through the HMEP and LEPC grants, the ECFRPC facilitates regional hazardous materials emergency response education and training, while providing outreach to increase hazardous materials awareness. The LEPC is comprised of local professionals representing occupational categories such as governmental,

firefighting, law enforcement, emergency management, transportation and private industry. Each quarter the LEPC meets and assesses the needs of the community for specific training opportunities. Below is a list of the 2013-2014 accomplishments.

CAMEOfm – Computer based chemical plume modeling training

E-Plan for Emergency Response Planning

HazCat Operations – Identification of hazardous materials

HazMat Medic – Treatment of patients exposed to hazardous materials

Hazardous Materials Symposium – training symposium for first responders

Bio Readiness Training Program – training on response to biological threats

Ethanol Emergency Preparedness and Response to Transportation Emergencies

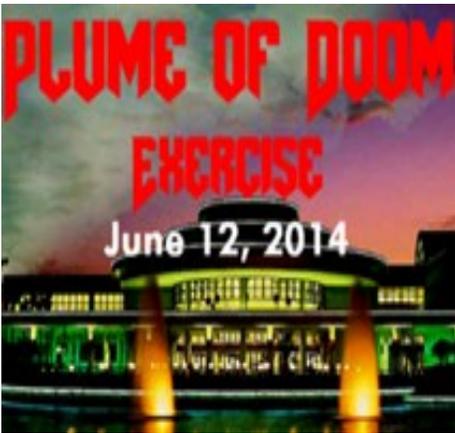
How-To-Comply Workshops – Tier 2 compliance training

Plume of Doom – A tabletop exercise for shelter-in-place and/or evacuation

2014 SPOTLIGHT EXERCISE

On June 12th the Local Emergency Planning Committee (LEPC) District VI of the East Central Florida Planning Council conducted a public safety Tabletop Exercise (TTX) at Walt Disney’s Swan and Dolphin Resort. Participants included first responders, emergency management partners, public transportation, and personnel from the theme parks and hotels near the International Drive Corridor. Sixty participants worked through a complex chemical scenario that began south east of International Drive with a large leak from a railcar hauling 30,000lbs of liquefied chlorine. Scenarios and plumes were designed through realistic data inputted into Computer-Aided Management of Emergency Operations (CAMEO) software, a plume modeling resource available to first responders. The TTX allowed public safety agencies and community partners to discuss response protocols, plans and procedures from mass evacuation and/or protection in place, as well as providing quality vetted information to the public, specifically the tourist population.

- Recently Completed Emergency Preparedness documents:*
- Brevard County Local Mitigation Strategy (LMS)
 - Volusia County Local Mitigation Strategy (LMS)
 - Local Emergency Planning Committee (LEPC) Plan
 - Brevard County Continuity of Operations Plan (COOP)
 - Brevard County Post Disaster Recovery Plan
 - City of Kissimmee Post Disaster Recovery Plan

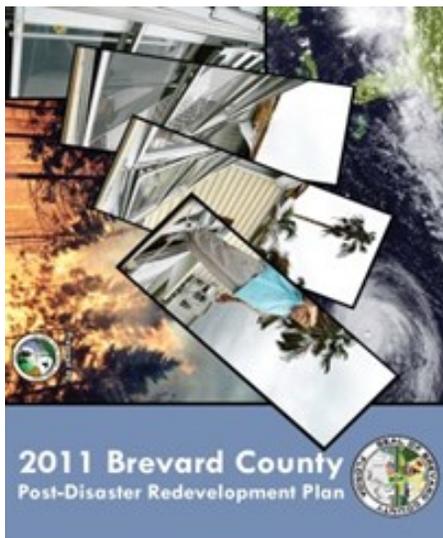


The ECFRPC also provides individual contractual support to the region for providing educational opportunities to public safety agencies and the community. This is accomplished through various exercises. Below is a list of the 2013-2014 accomplishments:

- Brevard County PIO Tabletop Exercise*
- Osceola County Emergency Operations Center Exercise*
- Osceola County Hospital/Mass Casualty Exercise*
- Osceola County Hurricane Tabletop Exercise*
- St Cloud Hurricane Tabletop Exercise*
- Bethune-Cookman Tabletop Exercise*
- Stetson Tabletop Exercise*
- City of DeLand Tabletop Exercise*
- Osceola County Health Department Tabletop Exercise*

Additional Class Room Training includes:

- CommT Training**
- Situational Awareness and Common Operating Picture Training**
- Incident Command Training**





7

PERFORMANCE MEASURES

PERFORMANCE MEASURES

1. NUMBER OF JOBS CREATED AFTER IMPLEMENTATION OF THE CEDS

- Total Employment in Initial Year
- Total Employment in Subsequent Years

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

- EDA Sponsored Investments

3. Number of Jobs Retained in the Region

- Number of Jobs Retained as a Result of Federal Investments
- 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 CEDS

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

SIX PILLARS MEASURES

1. Talent Supply & Education

- Average Annual Wage
- High School Graduation Rates
- 8th Grade Math Performance

2. Innovation & Economic Development

- Gross Domestic Product
- Bed Tax Collections
- Trade Exports and Imports

3. Infrastructure & Growth Leadership

- Population Counts, Estimates and Projections
- Building Permits
- Vehicle Miles Traveled per Lane Mile

4. Business Climate & Competitiveness

- Average Annual Unemployment Rates
- Employment by Industry
- Wages by Industry

5. Civic & Governance Systems

- Millage Rates
- Registered Nonprofit Organizations
- Voter Participation

SIX PILLARS OF FLORIDA'S FUTURE ECONOMY



8

COMMUNITY AND PRIVATE SECTOR PARTICIPATION



CEDS STRATEGY COMMITTEE SCHEDULE

The East Central Florida CEDS Strategy Committee met twice in 2014. The first meeting served to explain the concept of regional economic development and the CEDS process to new members. The purpose of the second meeting was to develop an economic vision for the region, and brainstorm ideas to create regional goals and objectives for the following pillars: Talent Supply and Education, Innovation and Economic Development, and Quality of Life and Quality Places.

Table 18: CEDS Strategy Committee Meeting Schedule

Meeting Date	Time	Location
August 11, 2014	2:00 pm to 4:00 pm	ECFRPC
August 20, 2014	2:00 pm to 4:00 pm	ECFRPC



CEDS GOVERNING BOARD

The East Central Florida Regional Planning Council's twenty-seven members serve as the East Central Florida CEDS Governing Board. The Council voted to transmit the CEDS document to EDA at their September meeting.

Table 19: CEDS Governing Board Presentation Schedule

Meeting Date	Time	Location
September 17, 2014	10:00 am	ECFRPC



Public Participation

The public was given 30 days (August 28, 2014 to September 28, 2014) to comment on the 2014 CEDS update. The public comment notice was published by the East Central Florida Regional Planning Council in Florida Administrative Weekly (FAW) on August 28, 2014. There was also an announcement posted in Volusia County's On the Scene weekly newsletter on the first week of September (see <http://www.floridabusiness.org/news-and-data-resources/scene/>)



9

APPENDICES

2011 CEDS Regional SWOT Survey

1. Regional SWOT Survey

In order to establish the top strengths, weaknesses, opportunities and threats, we ask you to please complete the following survey.

Please rank the strengths, weaknesses, opportunities, and threats either high, medium or low. High being the most important. The information provided below resulted from the 2011 CEDS Strategy Committee Kick-Off Meeting on March 7, 2011.



2011 CEDS Regional SWOT Survey

* 1. STRENGTHS: Please rank the following regional strengths (High, Medium, and Low with High being most important)

	High	Medium	Low
Central Florida Partnership as an organizing entity for business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digital Media Industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Entrepreneurship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Infrastructure - Incubators	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental Assets - Natural Areas, beach sun, wildlife, parks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Florida Hi-Tech Corridor Group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Global Name Recognition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I-4 Corridor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International Airports (OIA and others)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kennedy Space Center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medical/Bio Tech Industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
"No" Personal State Income Tax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Port Canaveral	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Revitalized Downtown Orlando	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Simulation Industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Talent Pool - Nationally Recognized Workforce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism + Volume of Visitors - 50 million per year	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value Proposition - Cost of doing business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volume of Visitors - 50 million per year	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Weather	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
World Class Entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2011 CEDS Regional SWOT Survey

*** 2. WEAKNESSES: Please rank the following regional weaknesses (High, Medium, and Low with High being most important)**

	High	Medium	Low
Affordable Housing is often not safe, sanitary and decent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost Burden - Housing + Transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fragmentation of Economic Development Efforts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High Cost of Property Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Infrastructure - Inadequate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of a Global Brand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of a Knowledge Infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of Available Venture Capital	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of Cultural Infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of Investment in Educational Infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Low Population Densities/Sprawl	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perception of Crime	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Political Alignment/Political Will	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Surface Transportation System Failing - delay and congestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water - Cost and Supply Concerns	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2011 CEDS Regional SWOT Survey

*** 3. OPPORTUNITIES: Please rank the following regional opportunities (High, Medium, and Low with High being most important)**

	High	Medium	Low
Business Incubators	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clean Energy Technology - Wind Energy, Solar, Bio Mass	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Connect Arts Assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ECF 2060 Plan as a roadmap to save \$100 billion in infrastructure, avoid sprawl	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emerging Hi-Tech Industries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy Policy - need to create a state incentive for alternative energy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K12 Education - Improve to attract business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Life Sciences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rental Cars - Electric Vehicles - Introduce to tourists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reopening Cuba	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Simulation Industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic Location - Global Commerce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transit Oriented Development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transportation - SunRail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Widening of Canal - Free Trade Agreement with Panama	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2011 CEDS Regional SWOT Survey

* 4. THREATS: Please rank the following regional threats (High, Medium, and Low with High being most important)

	High	Medium	Low
Climate Change and Sea Level Rise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complacency and Looking Backwards at Florida's Economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cuts and Changes in Defense Spending	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Declining Tax Base	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discretionary Spending	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase in Fuel Cost	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of Economic Diversity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Man Made and Natural Disasters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NASA - Space Shuttle Shutdown	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perception of Crime	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Political Will - Lack of	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Population Change - Slower growth rate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reduced Labor Mobility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Surface Transportation System Failing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustainability and Resiliency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Terrorism Threats	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

APPENDIX B

TALENT SUPPLY AND EDUCATION

The East Central Florida Region and the State of Florida face an emerging talent gap — a crisis in human capital that represents a vast and growing unmet need for a highly skilled and educated workforce.

More high school students are graduating on time but dropouts continue to be a significant problem, creating a drag on the economy. Economists say that over the next decade, the U.S. workforce will need 22 million college graduates but the country is expected to fall short by 3 million. Business leaders at large and small companies say it is difficult to recruit enough skilled and educated employees in the United States, despite an unemployment rate that is higher than 8 percent. (Washingtonpost.com, March 19, 2012)

In this section you will find data regarding Talent Supply and Education in East Central Florida's Economic Development District.

These measures include:

- Average Annual Wage
- High School Graduation Rates
- 8th Grade Math Performance

Table 20: Average Annual Wage

County		2010	2011
Brevard	Wage and salary disbursements (thousands of dollars)	9,290,538	9,343,095
Brevard	Wage and salary employment (number of jobs)	204,122	202,854
Brevard	Average wage per job	45,515	46,058
Lake	Wage and salary disbursements (thousands of dollars)	2,787,823	2,878,748
Lake	Wage and salary employment (number of jobs)	83,121	84,559
Lake	Average wage per job	33,539	34,044
Orange	Wage and salary disbursements (thousands of dollars)	30,243,142	31,377,900
Orange	Wage and salary employment (number of jobs)	688,815	701,894
Orange	Average wage per job	43,906	44,705
Osceola	Wage and salary disbursements (thousands of dollars)	2,656,696	2,771,691
Osceola	Wage and salary employment (number of jobs)	75,559	78,436
Osceola	Average wage per job	35,161	35,337
Seminole	Wage and salary disbursements (thousands of dollars)	6,833,632	6,952,055
Seminole	Wage and salary employment (number of jobs)	168,341	166,850
Seminole	Average wage per job	40,594	41,666
Volusia	Wage and salary disbursements (thousands of dollars)	5,677,496	5,728,540
Volusia	Wage and salary employment (number of jobs)	160,503	160,876
Volusia	Average wage per job	35,373	35,608

Source: Bureau of Economic Analysis, 2012

Table 21: High School Graduation Rates by Race & Ethnicity by % of Population 25 Years and Over, 2010

County	White Rate	Black Rate	Hispanic Rate	Asian Rate	Indian Rate	Multiracial Rate	Total Rate
BREVARD	87.4%	76.3%	81.3%	89.3%	50.0%	84.2%	85.2%
LAKE	80.4%	68.1%	75.4%	90.5%	87.5%	86.0%	78.2%
ORANGE	83.0%	62.2%	70.8%	91.3%	85.2%	78.7%	73.9%
OSCEOLA	83.8%	73.4%	73.8%	90.4%	70.0%	83.5%	77.5%
SEMINOLE	84.0%	66.0%	75.3%	93.2%	*	83.8%	80.3%
VOLUSIA	70.6%	54.6%	57.9%	81.7%	54.5%	72.3%	66.80%

Source: Florida Department of Education, Data Publication and Reports, 2012

Table 22: Eight Grade Math Performance

County	Year	Number of Students	Mean Developmental Scale Score	Mean Scale Score	% Level 1	% Level 2	% Level 3	% Level 4	% Level 5	% >=3
BREVARD	*2011	5,229	1944	8	16	40	22	14	76	79
BREVARD	2010	5,224	1951	7	14	40	23	16	79	77
BREVARD	2009	5,388	1948	8	15	38	23	16	77	77
LAKE	*2011	2,933	1910	11	20	41	18	11	69	67
LAKE	2010	2,883	1903	12	21	40	18	9	67	65
LAKE	2009	3,026	1894	12	23	41	17	8	65	68
ORANGE	*2011	13,087	1893	16	22	34	17	11	62	66
ORANGE	2010	12,622	1903	14	20	36	18	12	66	62
ORANGE	2009	12,712	1888	17	21	35	17	11	62	64
OSCEOLA	*2011	4,104	1863	19	24	37	13	7	57	59
OSCEOLA	2010	3,999	1868	17	24	38	15	6	59	56
OSCEOLA	2009	4,054	1854	21	23	35	16	6	56	53
SEMINOLE	*2011	5,078	1955	8	14	40	21	18	79	80
SEMINOLE	2010	4,884	1959	8	13	38	24	18	80	77
SEMINOLE	2009	5,191	1951	9	14	38	22	17	77	76
VOLUSIA	*2011	4,684	1885	14	24	41	15	7	63	66
VOLUSIA	2010	4,706	1897	12	22	40	17	9	66	64
VOLUSIA	2009	4,865	1890	14	22	38	18	8	64	65

*FCAT2 Performance Measures

Source: Florida Department of Education, 2012

INNOVATION AND ECONOMIC DEVELOPMENT

Competitiveness and prosperity in the 21st century will be based on technology, knowledge and innovation. Transforming our existing business base is the key to retention and expansion.

In this section you will find data regarding Innovation and Economic Development in East Central Florida’s Economic Development District.

These measures include:

- Gross Domestic Product
- Bed Tax Collections
- Trade Exports and Imports

Table 23: State Tax Collections by County

County	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12
BREVARD	798,363	945,784	1,234,904	1,521,774	1,116,007	994,190	1,005,281	1,048,695
LAKE	270,924	255,825	353,198	434,490	325,362	240,719	264,243	268,326
ORANGE	20,212,076	20,673,398	23,472,620	28,174,408	23,967,193	20,608,386	22,898,335	22,214,917
OSCEOLA	4,111,535	3,729,812	4,146,332	5,425,482	4,387,945	3,392,243	4,351,941	4,223,667
SEMINOLE	389,020	448,847	533,780	541,619	436,150	374,545	354,336	354,921
VOLUSIA	759,699	2,877,817	3,191,312	2,481,951	1,586,714	1,239,201	1,886,800	2,257,052
County	Sep-12	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13
BREVARD	856,635	724,486	755,493	758,728	849,320	959,872	1,170,305	1,537,690
LAKE	204,896	189,740	252,495	253,268	291,378	293,695	354,025	471,392
ORANGE	17,131,478	17,381,324	22,369,899	21,315,102	21,713,667	24,344,131	25,057,963	29,679,026
OSCEOLA	3,436,019	2,979,930	3,315,446	3,377,585	4,264,840	4,236,523	4,309,650	5,698,048
SEMINOLE	333,929	314,899	372,156	340,555	426,131	512,854	512,877	513,426
VOLUSIA	1,178,072	844,066	1,023,388	866,989	901,845	2,852,418	3,226,888	2,685,059
County	May-13	Jun-13						
BREVARD	1,053,319	973,837						
LAKE	345,751	279,466						
ORANGE	24,043,190	22,731,468						
OSCEOLA	4,347,457	3,876,517						
SEMINOLE	445,552	407,476						
VOLUSIA	1,557,639	1,311,414						

Source: Florida Department of Revenue, 2013

INFRASTRUCTURE AND GROWTH LEADERSHIP

Factors such as transportation, communications, and land use are critical to a vibrant economy. Congested and deteriorating roadways and railways could choke intra- and inter-state commerce and sprawl threatens the sufficiency of water and energy. However, smart and timely investments in strategies that are tied to sustainable infrastructure targets will lead to a shared economic prosperity (www.flchamber.com).

In this section you will find data regarding Infrastructure and Growth Leadership in East Central Florida's Economic Development District.

These measures include:

- Population Counts, Estimates and Projections
- Building Permits
- Vehicle Miles Traveled per Lane Mile

Table 24: Population Counts by County

County	Percent Change	2010	2000
BREVARD	14.1	543,376	476,230
LAKE	41.1	297,052	210,527
ORANGE	27.8	1,145,956	896,344
OSCEOLA	55.8	268,685	172,493
SEMINOLE	15.8	422,718	365,199
VOLUSIA	11.6	494,593	443,343

Source: Florida Statistical Abstract, 2010

Table 25: Annual Building Permit

Brevard County		Florida (009)		Year 2012			
Estimates with Imputation	Reported Only						
Item		Buildings	Units	Construction cost	Buildings	Units	Construction cost
Single Family		1,117	1,117	328,476,626	1,114	1,114	326,304,127
Two Family		0	-	-	-	-	0
Three and Four Family		1	3	361,562	1	3	361,562
Five or More Family		1	8	3,316,911	1	8	3,316,911
Total		1,119	1,128	332,155,099	1,116	1,125	329,982,600

Lake County		Florida (069)		Year 2012			
Estimates with Imputation	Reported Only						
Item		Buildings	Units	Construction cost	Buildings	Units	Construction cost
Single Family		890	890	252,862,237	884	884	251,619,074
Two Family		1	2	263,780	1	2	263,780
Three and Four Family		0	-	-	-	-	0
Five or More Family		7	50	1,746,650	7	50	1,746,650
Total		898	942	254,872,667	892	936	253,629,504

Orange County		Florida (095)		Year 2012			
Estimates with Imputation	Reported Only						
Item		Buildings	Units	Construction cost	Buildings	Units	Construction cost
Single Family		3,909	3,909	1,116,486,455	3,906	3,906	1,114,801,546
Two Family		30	60	6,821,978	30	60	6,821,978
Three and Four Family		6	24	2,558,274	6	24	2,558,274
Five or More Family		110	3,239	349,234,455	110	3,239	349,234,455
Total		4,055	7,232	1,475,101,162	4,052	7,229	1,473,416,253

Table 25 (cont.): Annual Building Permits

Osceola County		Florida (097)		Year 2012			
Estimates with Imputation	Reported Only						
Item		Buildings	Units	Construction cost	Buildings	Units	Construction cost
Single Family		1,479	1,479	330,369,571	1,479	1,479	330,369,571
Two Family		0	-	-	-	-	0
Three and Four Family		0	-	-	-	-	0
Five or More Family		65	1,016	112,296,237	65	1,016	112,296,237
Total		1,544	2,495	442,665,808	1,544	2,495	442,665,808

Seminole County		Florida (117)		Year 2012			
Estimates with Imputation	Reported Only						
Item		Buildings	Units	Construction cost	Buildings	Units	Construction cost
Single Family		1,044	1,044	222,674,476	1,041	1,041	222,055,990
Two Family		0	-	-	-	-	0
Three and Four Family		2	8	1,159,595	2	8	1,159,595
Five or More Family		5	285	28,509,764	5	285	28,509,764
Total		1,051	1,337	252,343,835	1,048	1,334	251,725,349

Volusia County		Florida (127)		Year 2010			
Estimates with Imputation	Reported Only						
Item		Buildings	Units	Construction cost	Buildings	Units	Construction cost
Single Family		760	760	219,667,186	756	756	218,421,096
Two Family		0	-	-	-	-	0
Three and Four Family		0	-	-	-	-	0
Five or More Family		0	-	-	-	-	0
Total		760	760	219,667,186	756	756	218,421,096

Source: U.S. Census Bureau, 2013

Table 26: Vehicle Miles Traveled per Lane Mile

CENTERLINE MILES

BREVARD	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	20.04	10.097	42.066	7.046	29.216	16.421	254.709	379.595
Small Urbanized	8.645	2.452	35.819	13.238	50.013	0	330.116	440.283
Large Urbanized	44.022	12.88	161.534	127.537	216.13	0	2,123.01	2,685.11
County Total	72.707	25.429	239.419	147.821	295.359	16.421	2,707.83	3,504.99

DAILY VEHICLE MILES TRAVELED

BREVARD	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	189,143	396,193	31,747	49,568	42,638	115,401	1,462,780	379.595
Small Urbanized	16,412	560,093	160,815	209,384	0	351,574	1,622,088	440.283
Large Urbanized	439,864	4,453,080	1,608,984	1,102,144	0	3,863,835	14,040,729	2,685.11
County Total	645,419	5,409,366	1,801,546	1,361,096	42,638	4,330,809	17,125,596	3,504.99

CENTERLINE MILES

LAKE	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	0	23.54	43.059	62.639	145.403	115.411	560.715	950.767
Small Urban	0	0.336	26.757	1.495	59.518	0	225.752	313.858
Small Urbanized	0	0	38.372	34.936	141.064	0	865.448	1,079.82
Large Urbanized	0	0	0.713	1.673	0.234	0	37.109	39.729
County Total	0	23.876	108.901	100.743	346.219	115.411	1,689.02	2,384.17

DAILY VEHICLE MILES TRAVELED

LAKE	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	0	908,095	691,651	396,274	550,720	179,175	358,733	3,084,648
Small Urban	0	14,057	716,898	12,528	292,479	0	183,085	1,219,046
Small Urbanized	0	0	1,241,914	515,520	983,311	0	921,702	3,662,448
Large Urbanized	0	0	10,196	9,436	1,360	0	67,538	88,530
County Total	0	922,151	2,660,659	933,758	1,827,870	179,175	1,531,058	8,054,672

Table 26(cont.): Vehicle Miles Traveled per Lane Mile

CENTERLINE MILES

ORANGE	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	0	20.226	29.555	7.816	17.696	23.487	117.635	216.415
Small Urbanized	0	0	0	0	0	0	239.188	239.188
Large Urbanized	24.673	130.509	153.289	284.643	501.93	0	3,095.42	4,190.47
County Total	24.673	150.735	182.844	292.459	519.626	23.487	3,452.25	4,646.07

DAILY VEHICLE MILES TRAVELED

ORANGE	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	0	893,594	437,234	62,662	46,109	106,694	80,462	1,626,756
Small Urbanized	0	0	0	0	0	0	254,735	254,735
Large Urbanized	3,811,766	6,491,808	5,874,365	6,906,516	5,097,244	0	5,594,337	33,776,036
County Total	3,811,766	7,385,402	6,311,599	6,969,178	5,143,353	106,694	5,929,534	35,657,527

CENTERLINE MILES

OSCEOLA	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	0	48.879	82.628	20.315	52.998	9.575	212.999	427.394
Small Urban	0	0	1.713	4.18	4.163	0	64.125	74.181
Small Urbanized	7.885	21.425	80.616	78.6	128.22	0	695.414	1,012.16
County Total	7.885	70.304	164.957	103.095	185.381	9.575	972.538	1,513.74

DAILY VEHICLE MILES TRAVELED

OSCEOLA	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	0	1,239,519	400,257	20,315	149,311	14,732	145,691	1,969,825
Small Urban	0	0	53,960	57,780	34,137	0	52,005	197,881
Small Urbanized	773,918	571,366	2,518,769	1,218,053	648,844	0	740,616	6,471,565
County Total	773,918	1,810,885	2,972,985	1,296,148	832,292	14,732	938,313	8,639,272

Table 26(cont.): Vehicle Miles Traveled per Lane Mile

CENTERLINE MILES

SEMINOLE	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	0	0	12.014	1.005	12.369	6.816	54.143	86.347
Large Urbanized	14.135	17.445	73.64	74.655	127.22	0	1,234.02	1,541.12
County Total	14.135	17.445	85.654	75.66	139.589	6.816	1,288.16	1,627.46

DAILY VEHICLE MILES TRAVELED

SEMINOLE	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	0	0	95,584	10,854	59,782	27,028	37,034	230,282
Large Urbanized	1,801,623	650,374	2,322,926	1,534,292	1,463,300	0	2,246,429	10,018,944
County Total	1,801,623	650,374	2,418,510	1,545,146	1,523,081	27,028	2,283,463	10,249,225

CENTERLINE MILES

VOLUSIA	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	32.115	0	74.458	36.898	29.765	39.009	267.985	480.23
Small Urbanized	10.942	0	36.918	69.864	122.788	0	828.378	1,068.89
Large Urbanized	30.767	0	147.786	55.02	176.424	0	1,399.35	1,809.35
County Total	73.824	0	259.162	161.782	328.977	39.009	2,495.71	3,358.47

DAILY VEHICLE MILES TRAVELED

VOLUSIA	Interstate	Turnpike & Freeways	Other Princ. Arter.	Minor Arterials	Urban/Major Coll.	Rural Minor Coll.	Locals	Total
Rural	1,594,335	0	673,407	246,748	60,574	43,161	177,605	2,795,829
Small Urbanized	925,002	0	735,642	954,317	579,394	0	891,129	4,085,484
Large Urbanized	1,643,773	0	3,035,242	447,384	865,337	0	2,546,813	8,538,549
County Total	4,163,110	0	4,444,291	1,648,450	1,505,305	43,161	3,615,547	15,419,863

Source: Florida Department of Transportation, Florida Highway Mileage and Travel Report, 2010

BUSINESS CLIMATE AND COMPETITIVENESS

Owners and executives make decisions about where they call home by evaluating the region's attractiveness in respect to its competitiveness across a host of business climate factors. Monitoring our position is critical to anticipating policy changes that secure our position among the most business friendly climates in the world.

In this section you will find data regarding Business Climate and Competitiveness in East Central Florida's Economic Development District.

These measures include:

- Average Annual Unemployment Rates
- Wages by Industry

Table 27: Average Unemployment Rates by County

County	LABOR FORCE	EMPLOYMENT	UNEMPLOYMENT	RATE (%)
BREVARD	268,281	243,535	24,746	9.2
LAKE	129,931	118,220	11,711	9.0
ORANGE	636,186	583,175	53,011	8.3
OSCEOLA	140,696	127,642	13,054	9.3
SEMINOLE	240,792	221,914	18,878	7.8
VOLUSIA	252,690	230,350	22,340	8.8

Source: Florida Department of Economic Opportunity, 2012

Table 28: Wages by Industry, Brevard

Ownership	Industry	Annual Average Establishment Count	Annual Average Employment	Annual Total Wages	Annual Average Weekly Wage	Annual Average Pay
Total Covered	Total, all industries	14,433	187,523	8,278,507	849	44,147
Federal Government	Total, all industries	89	6,221	481,650	1,489	77,428
State Government	Total, all industries	57	1,835	70,534	739	38,442
Local Government	Total, all industries	38	20,123	810,354	774	40,270
Private	Total, all industries	14,251	159,344	6,915,969	835	43,403
Private	Goods-Producing	2,252	29,047	1,854,055	1,227	63,830
Private	Natural Resources and Mining	45	203	5,976	565	29,390
Private	Construction	1,634	8,143	305,758	722	37,548
Private	Manufacturing	573	20,701	1,542,321	1,433	74,506
Private	Service-Providing	11,999	130,297	5,061,914	747	38,849
Private	Trade, Transportation, and Utilities	2,995	33,649	1,112,605	636	33,065
Private	Information	199	2,031	115,648	1,095	56,956
Private	Financial Activities	1,354	7,332	339,734	891	46,335
Private	Professional and Business Services	3,078	26,816	1,533,071	1,099	57,169
Private	Education and Health Services	1,682	32,092	1,414,255	847	44,069
Private	Leisure and Hospitality	1,369	22,667	392,313	333	17,308
Private	Other Services	1,259	5,677	152,991	518	26,951
Private	Unclassified	65	34	1,297	735	38,243

Source: U.S. Department of Labor, Bureau of Labor Statistics, 2012

Table 28 (cont.): Wages by Industry, Lake

Ownership	Industry	Annual Average Establishment Count	Annual Average Employment	Annual Total Wages	Annual Average Weekly Wage	Annual Average Pay
Total Covered	Total, all industries	7,272	81,250	2,658,157	629	32,716
Federal Government	Total, all industries	41	554	32,566	1,131	58,836
State Government	Total, all industries	48	1,123	41,045	703	36,563
Local Government	Total, all industries	30	10,972	415,369	728	37,857
Private	Total, all industries	7,153	68,602	2,169,177	608	31,620
Private	Goods-Producing	1,312	10,080	363,688	694	36,082
Private	Natural Resources and Mining	144	1,711	46,863	527	27,389
Private	Construction	962	4,872	174,798	690	35,876
Private	Manufacturing	206	3,496	142,027	781	40,623
Private	Service-Providing	5,841	58,522	1,805,489	593	30,851
Private	Trade, Transportation, and Utilities	1,619	18,077	521,434	555	28,846
Private	Information	74	1,212	47,236	749	38,968
Private	Financial Activities	710	3,259	120,028	708	36,827
Private	Professional and Business Services	1,283	7,760	250,480	621	32,280
Private	Education and Health Services	875	15,305	644,534	810	42,113
Private	Leisure and Hospitality	630	10,118	154,771	294	15,296
Private	Other Services	599	2,711	65,113	462	24,019
Private	Unclassified	51	80	1,893	454	23,584

Source: U.S. Department of Labor, Bureau of Labor Statistics, 2012

Table 28 (cont.): Wages by Industry, Orange

Ownership	Industry	Annual Average Establishment Count	Annual Average Employment	Annual Total Wages	Annual Average Weekly Wage	Annual Average Pay
Total Covered	Total, all industries	36,321	680,429	29,146,792	824	42,836
Federal Government	Total, all industries	97	10,134	729,659	1,385	72,003
State Government	Total, all industries	112	11,207	514,878	883	45,941
Local Government	Total, all industries	47	46,102	1,947,029	812	42,233
Private	Total, all industries	36,066	612,986	25,955,226	814	42,342
Private	Goods-Producing	4,250	54,711	2,952,139	1,038	53,959
Private	Natural Resources and Mining	206	3,327	92,087	532	27,681
Private	Construction	3,028	24,583	1,182,317	925	48,094
Private	Manufacturing	1,016	26,801	1,677,735	1,204	62,600
Private	Service-Providing	31,816	558,275	23,003,087	792	41,204
Private	Trade, Transportation, and Utilities	8,070	120,901	4,398,304	700	36,379
Private	Information	700	16,441	962,317	1,126	58,532
Private	Financial Activities	3,981	42,856	2,608,547	1,171	60,867
Private	Professional and Business Services	8,765	116,397	6,225,035	1,028	53,481
Private	Education and Health Services	3,526	80,140	3,999,852	960	49,911
Private	Leisure and Hospitality	3,499	162,888	4,251,281	502	26,099
Private	Other Services	2,948	18,082	542,036	576	29,976
Private	Unclassified	327	569	15,716	531	27,632

Source: U.S. Department of Labor, Bureau of Labor Statistics, 2012

Table 28 (cont.): Wages by Industry, Osceola

Ownership	Industry	Annual Average Establishment Count	Annual Average Employment	Annual Total Wages	Annual Average Weekly Wage	Annual Average Pay
Total Covered	Total, all industries	5,623	74,577	2,523,815	651	33,842
Federal Government	Total, all industries	16	367	21,208	1,112	57,839
State Government	Total, all industries	36	746	26,449	682	35,450
Local Government	Total, all industries	14	10,646	455,173	822	42,754
Private	Total, all industries	5,557	62,818	2,020,986	619	32,172
Private	Goods-Producing	702	4,900	198,027	777	40,416
Private	Natural Resources and Mining	44	306	9,140	575	29,901
Private	Construction	549	3,404	140,190	792	41,189
Private	Manufacturing	109	1,190	48,698	787	40,908
Private	Service-Providing	4,855	57,919	1,822,959	605	31,475
Private	Trade, Transportation, and Utilities	1,282	15,515	407,498	505	26,265
Private	Information	69	403	21,045	1,005	52,286
Private	Financial Activities	641	4,077	163,442	771	40,091
Private	Professional and Business Services	1,053	6,780	231,937	658	34,208
Private	Education and Health Services	566	10,524	446,870	817	42,462
Private	Leisure and Hospitality	739	19,108	511,243	515	26,756
Private	Other Services	452	1,470	39,917	522	27,161
Private	Unclassified	54	42	1,007	457	23,789

Source: U.S. Department of Labor, Bureau of Labor Statistics, 2012

Table 28 (cont.): Wages by Industry, Seminole

Ownership	Industry	Annual Average Establishment Count	Annual Average Employment	Annual Total Wages	Annual Average Weekly Wage	Annual Average Pay
Total Covered	Total, all industries	13,847	158,529	6,390,064	775	40,309
Federal Government	Total, all industries	33	1,194	72,583	1,169	60,782
State Government	Total, all industries	47	751	27,963	716	37,238
Local Government	Total, all industries	23	14,792	607,881	790	41,095
Private	Total, all industries	13,745	141,792	5,681,637	771	40,070
Private	Goods-Producing	2,037	18,005	769,179	822	42,720
Private	Natural Resources and Mining	46	216	5,900	524	27,274
Private	Construction	1,523	11,686	490,191	807	41,947
Private	Manufacturing	469	6,103	273,087	861	44,748
Private	Service-Providing	11,707	123,786	4,912,458	763	39,685
Private	Trade, Transportation, and Utilities	2,958	35,946	1,374,493	735	38,237
Private	Information	252	4,751	322,934	1,307	67,979
Private	Financial Activities	1,658	14,442	732,110	975	50,693
Private	Professional and Business Services	3,274	26,746	1,153,132	829	43,115
Private	Education and Health Services	1,391	19,375	818,986	813	42,269
Private	Leisure and Hospitality	1,034	16,963	302,621	343	17,841
Private	Other Services	1,065	5,511	206,476	720	37,463
Private	Unclassified	76	53	1,706	624	32,448

Source: U.S. Department of Labor, Bureau of Labor Statistics, 2012

Table 28 (cont.): Wages by Industry, Volusia

Ownership	Industry	Annual Average Establishment Count	Annual Average Employment	Annual Total Wages	Annual Average Weekly Wage	Annual Average Pay
Total Covered	Total, all industries	13,342	149,897	5,223,129	670	34,845
Federal Government	Total, all industries	41	1,140	76,985	1,298	67,516
State Government	Total, all industries	75	2,910	110,929	733	38,114
Local Government	Total, all industries	32	15,926	684,122	826	42,957
Private	Total, all industries	13,195	129,920	4,351,093	644	33,491
Private	Goods-Producing	2,274	17,174	655,888	734	38,191
Private	Natural Resources and Mining	135	1,504	26,867	343	17,860
Private	Construction	1,706	7,369	258,077	673	35,022
Private	Manufacturing	433	8,301	370,944	859	44,689
Private	Service-Providing	10,921	112,746	3,695,205	630	32,775
Private	Trade, Transportation, and Utilities	2,797	29,399	833,607	545	28,355
Private	Information	169	1,912	90,191	907	47,163
Private	Financial Activities	1,325	7,339	297,891	781	40,588
Private	Professional and Business Services	2,469	14,783	576,316	750	38,986
Private	Education and Health Services	1,459	31,450	1,303,617	797	41,451
Private	Leisure and Hospitality	1,398	22,540	406,976	347	18,056
Private	Other Services	1,219	5,240	184,684	678	35,242
Private	Unclassified	86	82	1,922	450	23,393

Source: U.S. Department of Labor, Bureau of Labor Statistics, 2012

CIVIC AND GOVERNANCE SYSTEMS

The role of civic structures in place to deliver services, set rules that organize business and society, and provide vehicles for the public to engage in, influence, and change the way society works are important to the vitality of the region.

In this section you will find data regarding Civic and Governance Systems in East Central Florida's Economic Development District.

These measures include:

- Registered Nonprofit Organizations
- Voter Participation

Table 29: Registered Nonprofit Organizations by County 2011

County	Number of Registered Organizations		Number of Organizations Filing Form 990 *		Total Revenue Reported on Form 990 *		Assets Reported on Form 990 *	
	Count	%	Count	%	Revenue	%	Assets	%
Brevard, FL	1,448	2.80%	895	3.00%	2,236,434,748	3.70%	2,330,253,213	2.30%
Lake, FL	820	1.60%	458	1.50%	991,471,368	1.60%	1,753,368,646	1.80%
Orange, FL	3,530	6.90%	2,051	6.80%	7,707,142,347	12.70%	17,058,724,466	17.10%
Osceola, FL	480	0.90%	227	0.80%	128,631,498	0.20%	200,624,910	0.20%
Seminole, FL	1,090	2.10%	636	2.10%	262,021,798	0.40%	413,477,881	0.40%
Volusia, FL	1,276	2.50%	740	2.50%	1,686,234,709	2.80%	2,346,481,161	2.40%

Source: National Center for Charitable Statistics 2011

* Includes organizations that filed a Form 990, 990-EZ, 990-PF and, since 2008, 990-N ePostcard within 24 months of the BMF release date, as reported in NCCS Core Files and IRS Business Master Files.

Table 30: Voter Participation

November 6, 2012 General Election				August 14, 2012 Primary Election				January 31, 2012 Presidential Preference			
County	Voter Reg	Turnout	% Turnout	County	Voter Reg	Turnout	% Turnout	County	Voter Reg	Turnout	% Turnout
Brevard	380,469	287,546	75.6%	Broward	367,536	86,163	23.4%	Broward	154,817	73,745	47.6%
Lake	201,652	151,975	75.4%	Lake	195,773	45,471	23.2%	Lake	85,325	40,758	47.8%
Orange	690,645	470,192	68.1%	Orange	649,038	114,284	17.6%	Orange	193,897	77,072	39.7%
Osceola	163,384	109,542	67.0%	Osceola	151,721	23,808	15.7%	Osceola	41,118	14,088	34.3%
Seminole	277,376	209,913	75.7%	Seminole	262,923	49,965	19.0%	Seminole	105,984	48,330	45.6%
Volusia	332,556	236,215	71.0%	Volusia	319,204	75,262	23.6%	Volusia	108,694	41,877	38.5%
Total	2,046,082	1,465,383	71.6%	Total	1,946,195	394,953	20.3%	Total	689,835	295,870	42.9%

Source: Florida Department of State, Division of Elections

QUALITY OF LIFE AND QUALITY PLACES

(New text here) Economic and cultural sage, 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.

In this section you will find data regarding Quality of Life and Quality Places in East Central Florida's Economic Development District.

These measure include:

- Millage Rates
- Registered Nonprofit Organizations
- Voter Participation

Table 31: Per Capita Income by County

County	2010	2011
Brevard, FL	36,675	38,028
Lake, FL	32,554	33,846
Orange, FL	34,916	35,990
Osceola, FL	26,149	27,171
Seminole, FL	39,596	40,914
Volusia, FL	32,339	33,436

Source: Bureau of Economic Analysis, 2012

Table 32: Persons Living in Poverty

County	Median household income (dollars)	Poor persons		Persons under age 18 in poverty		Related children living in poverty	
		Total	Percentage	Total	Percentage	Total	Percentage
Brevard	46,331	72,157	13.5	21,030	20	13,876	17.7
Lake	42,343	39,711	13.5	13,618	22.4	8,927	20.1
Orange	45,105	183,812	16.4	60,882	22.8	41,346	21.4
Osceola	42,165	43,365	16.3	16,870	24.2	11,163	21.6
Seminole	57,381	46,071	11	13,507	14.1	9,357	12.9
Volusia	41,368	79,513	16.5	24,247	26.6	16,009	24

*Full BEBR 2012 data has not been completed as of August 2013

Source: BEBR 2011



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The statements, findings, conclusions, and recommendations are those of the East Central Florida Regional Planning Council and do not necessarily reflect the views of the U.S. Economic Development Administration or the U.S. Department of Commerce.