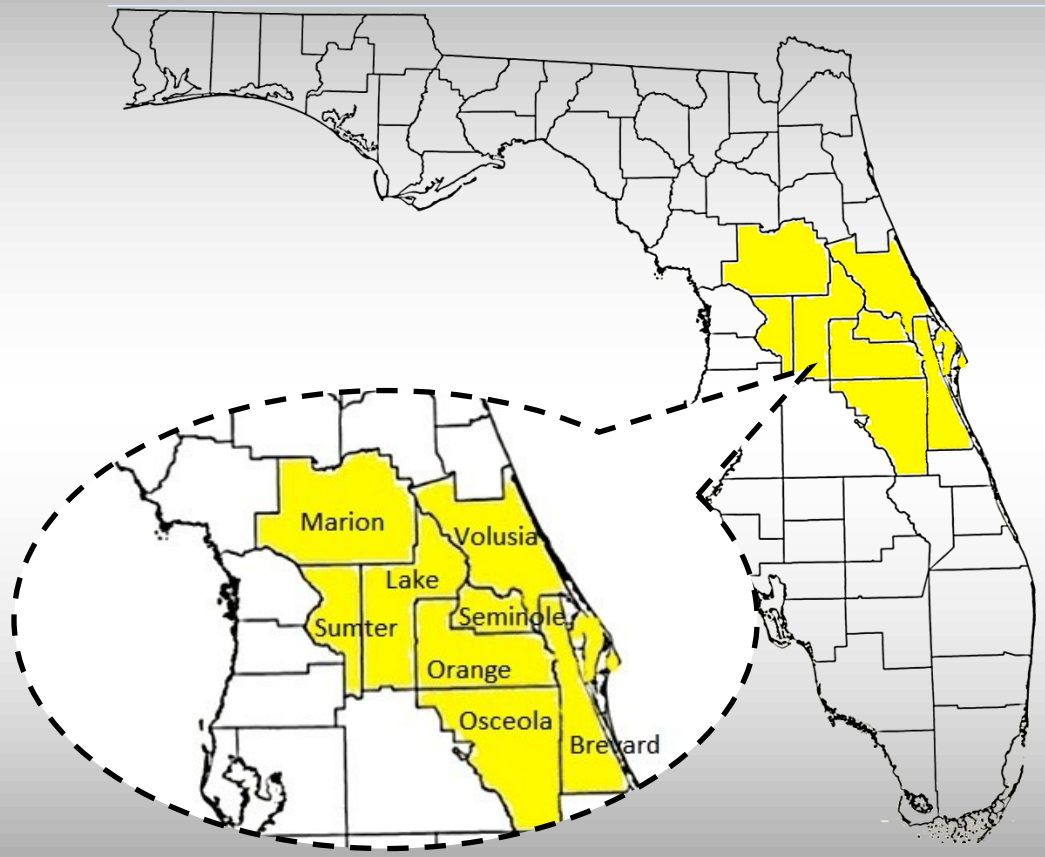
2020

EAST CENTRAL FLORIDA CEDS

Towards a Resilient Region



Brevard

Lake

Marion

Orange

Osceola

Seminole

Sumter

Volusia

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ABOUT THE EAST CENTRAL FLORDIA REGIONAL PLANNING COUNCIL (ECFRPC)

Established in 1962 as an area-wide association of local governments, the ECFRPC is one of Florida's ten regional planning councils. Council staff provides technical assistance in the areas of land use and environmental planning, emergency preparedness, geographic information systems (GIS), health, housing, urban design, transportation and economic and fiscal analysis among others. Because of the ECFRPC, member governments have received more than $13.8 million in federal and state grants since 2011. This represents a return on investment of $3.59 for every dollar paid in assessments.

The ECFRPC is currently designated by the U.S Economic Development Administration as the region's Economic Development District (EDD). The EDD program provides economic technical assistance to public and private organizations within the eight-county region. This includes performing economic impact analyses using the REMI model, developing economic strategic plans, and assisting with grant applications.

For more information about ECFRPC programs, visit the organization's website at www.ecfrpc.org.

Serving Brevard, Lake, Marion, Orange, Osceola, Seminole, Sumter, and Volusia Counties

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2017 CEDS: Towards a Resilient Region

The East Central Florida Economic Development District (EDD) is a partnership between the U.S. Economic Development Administration and the East Central Florida Regional Planning Council. Through this program communities and organizations located within the Council's 8-county region can access federal monies to fund a variety of economic development projects. EDD staff also provides a variety of economic technical assistance services to the community including assistance with grant applications, development of economic strategic plans, and economic impact analysis

One of the responsibilities of the EDD is to develop and implement the region's Comprehensive Economic Development Strategy (CEDS). This is a strategy-driven plan that strives to create a region capable of withstanding and recovering quickly from major economic and natural disasters. Resiliency can be achieved when regional leaders focus their efforts on improving the area's people, economic, and place based assets and address their weaknesses through a variety of efforts. These include developing the region's workforce, fostering innovation and economic competiveness, harnessing its infrastructure and place-based assets, and promoting collaboration among the different stakeholders.

Finally, the CEDS is developed with the assistance of a Strategy Committee comprised of members from the private and public sectors including economic development organizations, workforce development agencies, local governments, business leaders, higher education institutions, and private individuals. The Council's governing board of elected and appointed officials is also an important part of this process.

CEDS Framework

People **E**conomy **P**laces

CEDS Strategy Committee Meetings

PEOPLE

PEOPLE

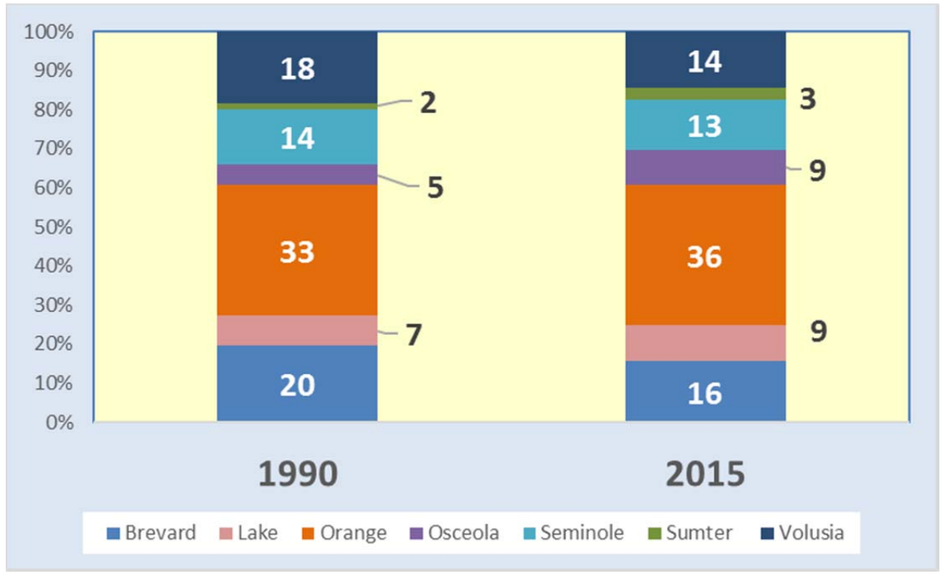
Population Trend Changes 1990-2040

One of the biggest drivers of economic growth in our region is population growth. Every year, thousands of people move to East Central Florida counties because of new job opportunities or to retire. In fact, the region added almost 1.5 million residents between 1990 and 2015 (REMI). This represents a 71% growth rate over this 25 year period. East Central Florida's new residents require new homes, commercial spaces, and other amenities to improve their quality of life.

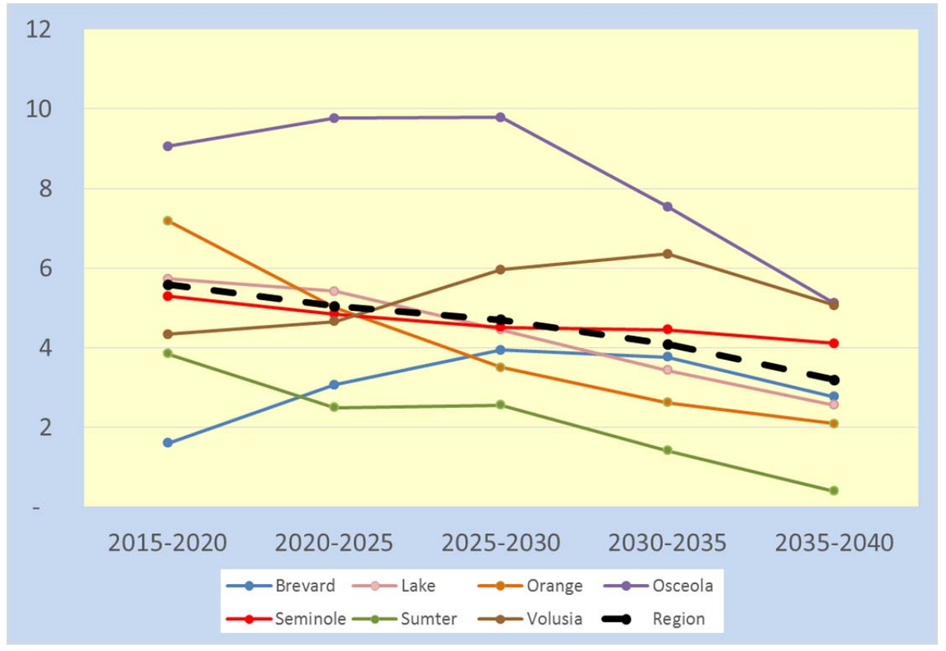
While population growth occurred across the region, it was more prevalent within the Metro Orlando region (Orange, Lake, Osceola, and Seminole counties). In 1990, about 59% of the region's residents lived within these counties. Now the Metro Orlando region comprises about 67 % of East Central Florida's population. This is probably due to the high number of jobs available in Orange County, the region's primary county. The effects of this employment surge spilled over to nearby Lake and Osceola counties as people looked for a cheaper place to live. On the other hand, the coastal counties share of population decreased about 8%. This could be because these counties generally tend to attract more retirees.

According to REMI's forecast, population growth is expected to continue over the next 25 years. However, the rate of growth will continue to decrease 25% between 2015 and 2014. This trend is a reflection of the nation's aging population and declining birth rates. Brevard, Lake, Sumter, and Orange counties are expected to have population growth rates lower than the rest of the region. On the other hand, Osceola, Seminole, and Volusia counties are expected to experience higher population growth rates.

Regional Population Share by County 1990 and 2015



Five-Year Population Growth Rates 2015-2040



Source: REMI model version 1.7

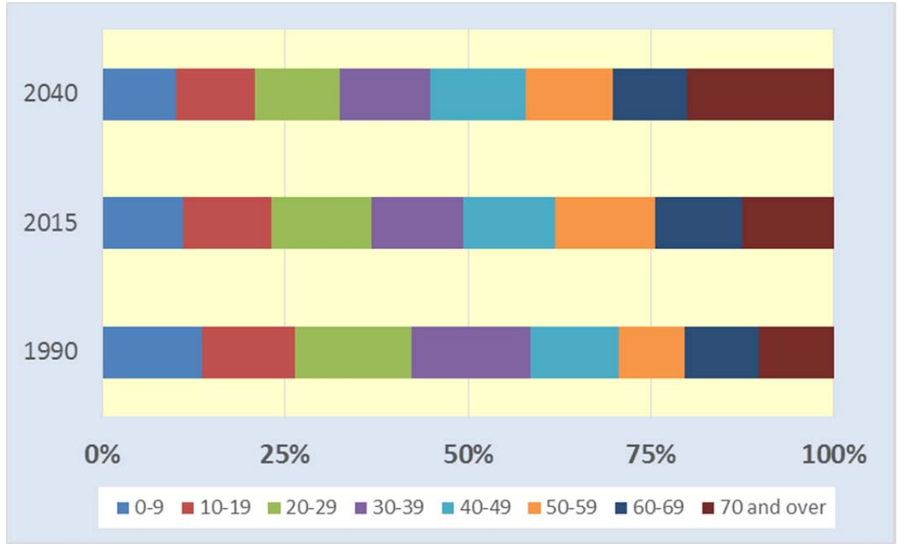
Population Composition

The composition of the population can be studied in more detail by using the ten-year cohort methodology. For the purpose of this discussion, we will focus on three groups: young (0-19), working age (20-59), and retirees (over 60 years old).

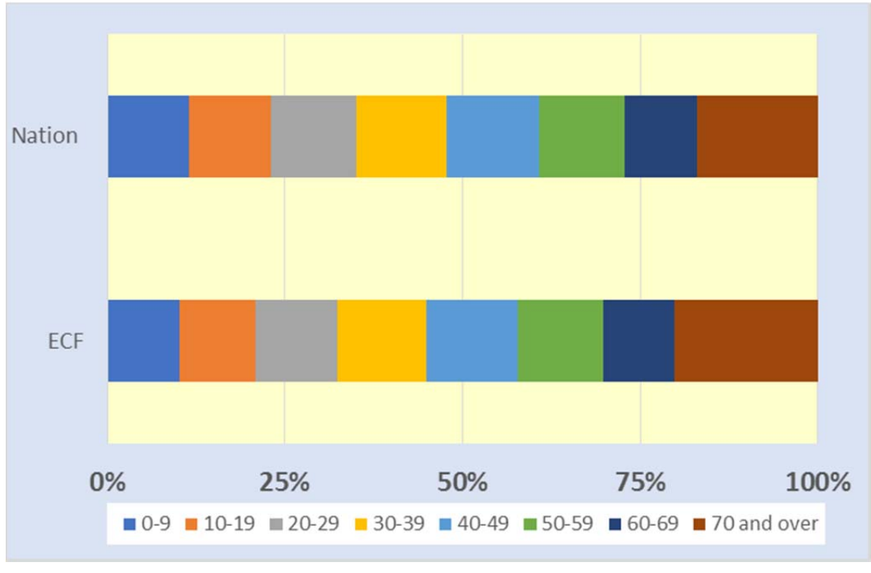
In 1990, the young cohort group comprised 27% of the region's population. This group also represents the population outside of the workforce. Another 53% of the region's population was within their prime working years. This left another 20% of the population as retirees.

Even though it added about 1.5 million new residents during the past twenty five years, the region's population continued to age during this period. According to the REMI model, this trend is expected to continue. While the workforce population will still comprise about half of the East Central Florida's residents, retirees will become 30 percent of the overall population. Moreover, at 20 percent, the forecast puts East Central Florida with a much higher share of retirees than the rest of the nation.

Differences in East Central Florida's Population Composition 1990-2040



East Central Florida and Nations Population Composition 2040



Source: REMI model version 1.7

The Villages: Fastest Growing Metro Area in the Nation

As a master-planned retirement community, The Villages offer residents the opportunity to enjoy the perks of retirement while remaining active within the community. Located within Sumter County, Florida, The Villages remains one of America's fastest-growing metropolitan areas. The streets are lined with manicured lawns and residents travel by golf cart. This community offers a small paradise for those looking for retirement living. The influx of residents has resulted in the community becoming the world's largest retirement community. The population has quadrupled within the past 20-years. The community continues to purchase land from Sumter County and plans to continue expansion. The Villages population is larger than 31 of the 67 counties in Florida. There is no sign of growth slowing down.

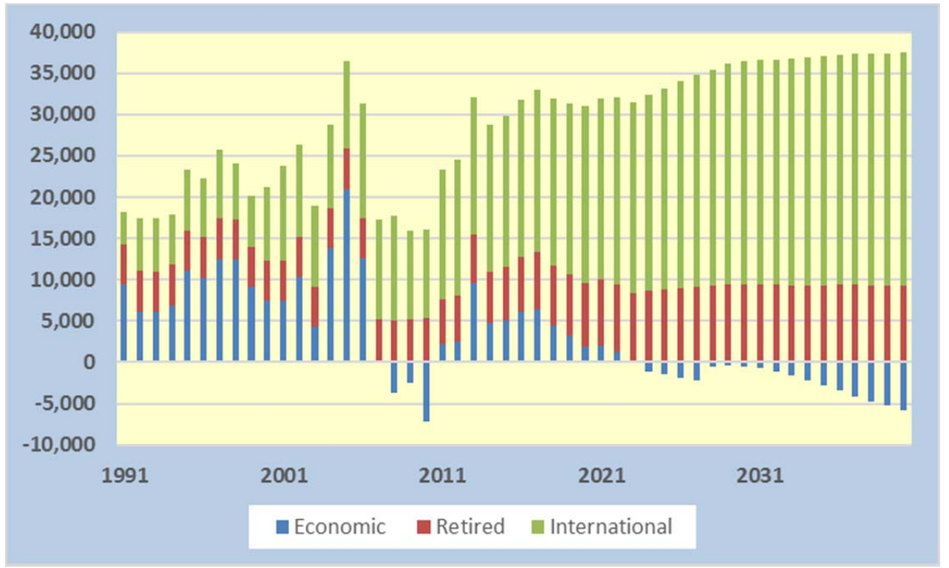
Population Change Components

Population growth is measured as the increase in the number of individuals based on natural growth (difference between births and deaths) and migration (number of individuals coming from other regions). In the case of East Central Florida, migration has surpassed natural growth as the main driver of population change since the 1990s. During the past twenty-five years, the region has received an average of 27,000 migrants each year (REMI, 2015).

The REMI model classfies migrants into three subcategories: economic, retirees, and international. Economic migrants include all people under the age of 65 coming from other parts of the nation based on economic or amenity factors. Retirees are domestic migrants over 65 who decide to relocate permanently in East Central Florida. Finally, the international migrants subcategory includes people moving here from other parts of the world. According to REMI data, the flow of migrants from each of these groups has varied through the years. During the 1990s, domestic economic migrants was the dominant subgroup. This trend started to change in the early 2000s, when international migration started to outpace domestic migration, especially during the economic recession when the overall number of migrants dropped precipitously. REMI forecasts that international migrants will continue to be the largest group during the next 25 years. The flow of retirees will continue to comprise about 30% of all new residents.

Overall, migrants help to enrich East Central Florida's economic and community well-being. They help to augment the available workforce and bring new skills and life experiences that contributes to the overall business environment. The main challenge for East Central Florida will be to identify ways in which these migrants can be best integrated into the community's fabric. Moreover, it is important to acknowledge that some members of these migrant populations will also require specialized services. This includes creating programs that help international and domestic migrants coming from Puerto Rico to increase their English fluency. In the case of retirees, it would identify how these residents can best contribute their talents and skills to the community.

Number and Composition of East Central Florida's Migrant Population 1991-2040



Source: REMI model version 1.7

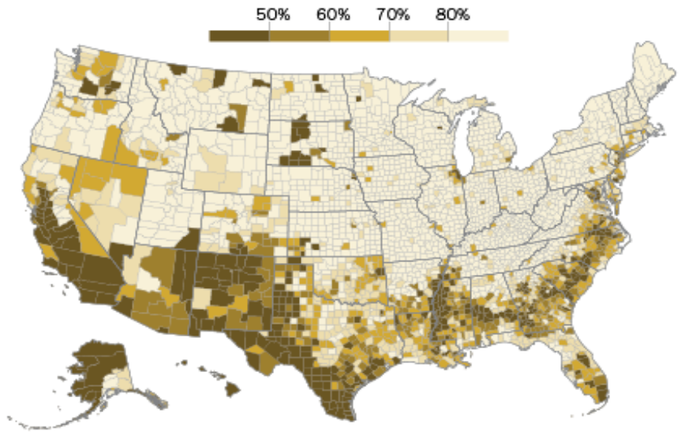
Type of migrants relocating to East Central Florida

The Rise of Minority-Majority Counties

According to the Pew Research Center, the nation's white share of the population is currently declining as Hispanic, Asian, and black populations continue to grow. This demographic shift is not occurring uniformly, but is mainly concentrated in urban counties located in the Sun Belt. Seventy-eight counties in 19 states have turned into majority-minority counties where no single racial or ethnic group is predominant. Four of these counties are located in Florida, and two within the East Central Florida region. Orange and Osceola Counties have experienced steady increases in Hispanic populations, so much so that Orange and Osceola Counties became less than 50% white in 2006 and 2005, respectively. Osceola County is experiencing an especially heavy migration of Hispanic people, principally from Puerto Rico. According to REMI forecasting software, this population trend is expected to continue. This demographic trend is not just a Hispanic phenomenon. Since 1990, the percentage of white, non-Hispanic residents in Orange and Osceola Counties has steadily declined, and is projected to continue. Furthermore, Orange County has experienced an influx of other non-Hispanic residents, a trend also expected to continue.

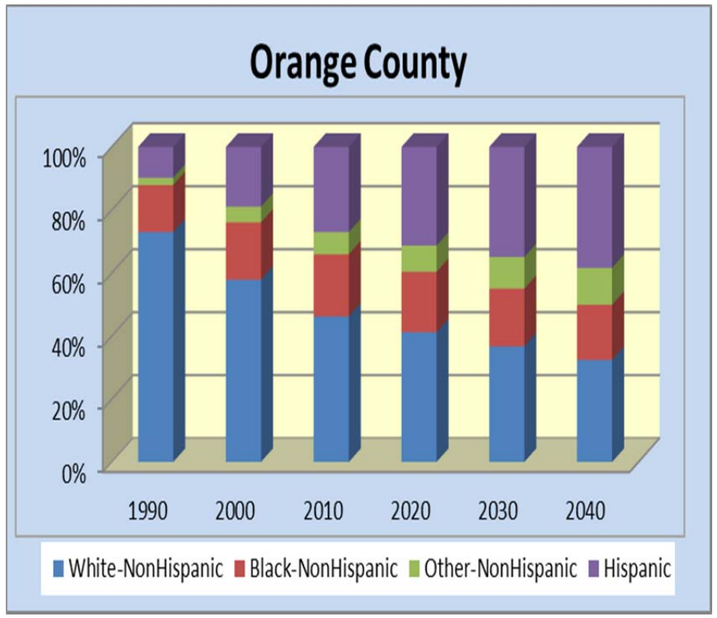
Counties with a White Minority Are Mostly in Sun Belt

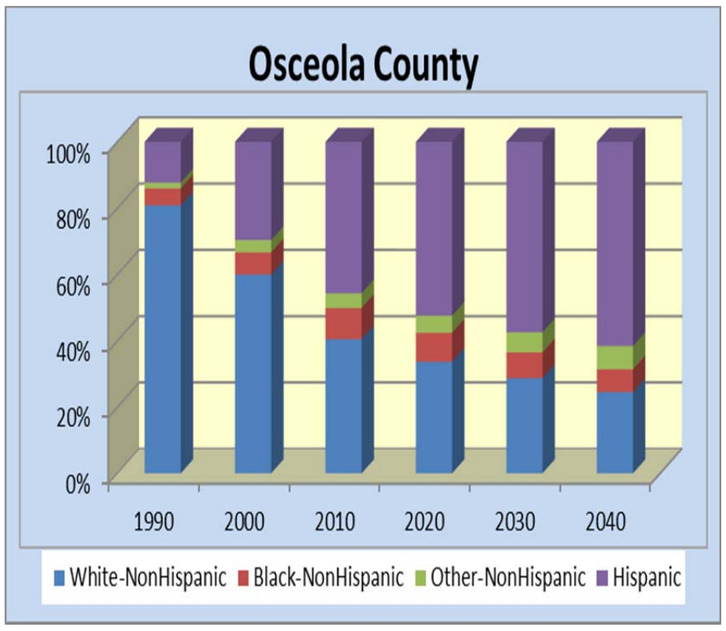
Non-Hispanic white share of county population (2013)



Source: Pew Research Center tabulations of 2013 Census Bureau Population Estimates

Population Distribution by Race and Ethnicity





Sources: REMI model version 1.7

Labor Force Characteristics

Human capital-defined as the skills, education, knowledge, and aptitudes of the workforce- is probably the most important resource that any region has available to attract new industries and investments. There are several factors that need to be examined when assessing the quality of the region's labor supply. These include labor force participation trends, the region's occupational mix, labor force quality, and labor costs.

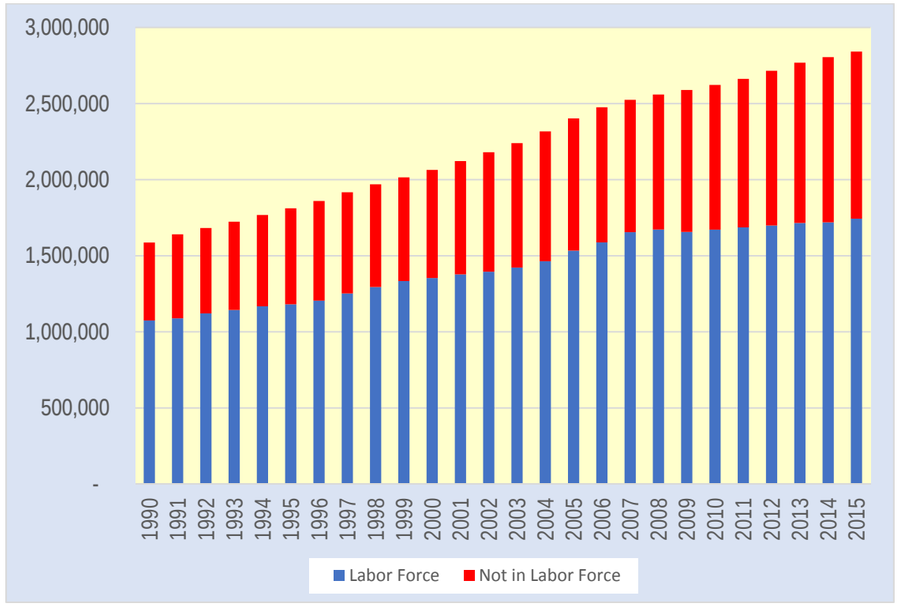
Labor Force Trends

As learned from the previous section, East Central Florida is a dynamic region that attracts many people looking for new work opportunities. Despite the high inflow of newcomers, East Central Florida's labor force participation rate has remained steady around 60% during the past 25 years. According to the REMI forecast, the percentage of people participating in the regional labor force is not expected to change.

Labor force participation varies across the different East Central Florida counties. Seminole, Orange, Osceola, and Brevard counties have the highest labor force participation rates in the region. Lake, Sumter, and Volusia counties have a higher population of retirees and thus have labor force participation rates that are lower than the region because East Central Florida is a magnet for seniors looking to retire. Moreover, the region's labor force participation rate is also lower than the national average.

There are a variety of reasons besides retirement why people decided to remain out of the workforce. These include family responsibilities, school, or bad health/disability. In addition to these, potential workers may become discouraged and decide to stop looking for jobs because of their low skill levels, criminal background, lack of child care, or transportation. In some cases, these people remain marginally attached to the labor market through the informal economy by doing odd jobs that get paid in cash. More important for economic developers is that this population tends to be concentrated in particular urban neighborhoods and rural communities. It is, therefore, important to develop specific strategies and programs to help these individuals attain full employment.

East Central Florida's Labor Force Population 1990-2015



Entering the Career Ladder: Jobs Partnership's Life Works Program

The Jobs Partnership of Florida (JP) is a faith-based partnership of individuals, churches, employers and community organizations working together to improve the lives of the underemployed and working poor in Metro Orlando. The genesis of the program was the Orlando Regional Chamber of Commerce's Workforce 2020 Initiative, which sought to involve the business and faith communities in workforce development as part of the 1996 Welfare Reform Act. The JP model was successfully tested during this time, which led to the formation of a non-profit organization in 1999.

JP provides an innovative, 12-week course called Lifeworks Training. Valued at $2,000, the program is offered completely free to qualified students. During the course of the program, students are paired with a trained volunteer coach who becomes their mentor and advocate. They learn important soft and job seeking skills and have the opportunity to attend exclusive events such as Employer Partner Career Fairs and Community Resource Fairs. Upon graduation, students are guided in choosing the right next step, whether it's new career opportunities, specialized vocational training in high demand careers or higher education

Analyzing East Central Florida's Occupational Mix

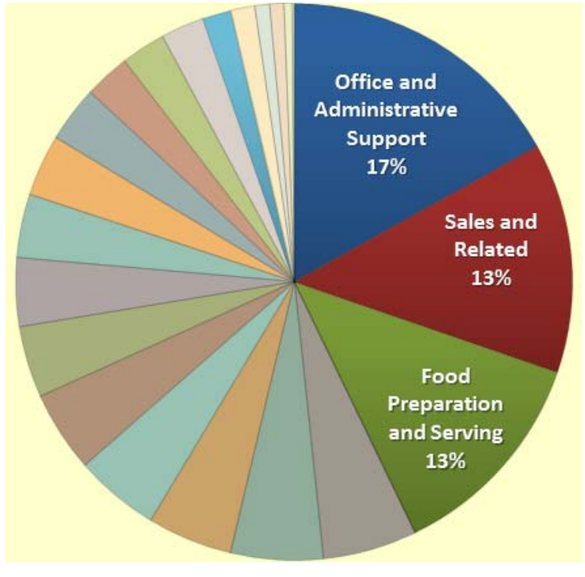
The occupational composition of the region's workforce can help to assess the quality of the regional labor force. For this analysis, the ECFRPC used data from the Florida Research and Economic Information Database Application (FREIDA). This information is organized based on the 2010 Standard Occupational Classification (SOC) system, which classifies occupations into particular groups according to the works and the tasks performed by the employee. The SOC System is divided into 23 major occupation groups.

According to FREIDA, 43% of East Central Florida workers belong to three major occupational groups. The largest group is Office and Administrative Support, which includes occupations that focus on customer service, and desktop publishing, among other clerical duties. Sales and Related Occupations includes professions that sell a variety of goods and services to the public including real estate, insurance, and other retail products. Finally, the Food Preparation and Serving Occupations includes cooks, waiters/waitresses, bartenders, and other similar careers. A common denominator between all these occupational groups is that these careers require little or no formal education.

The FREIDA database also provides occupational concentration information for the four different metropolitan areas (MSAs) that comprise the East Central Florida region. This methodology compares the percentage of regional workers within a particular occupation to the national percentage. It helps to provide a more accurate picture of the region's occupational mix.

For the purpose of this discussion, the ECFRPC focused on those occupations that had high concentration ratios across the region's different MSAs. Three occupational groups show a high concentration of workers within three or more of the region's metropolitan areas: Building and Grounds Cleaning, Construction and Extraction, and Sales and Related Occupations. These occupations are mostly involved in the purchasing, selling and maintenance of real estate properties. It also is important to note that the coastal counties, Brevard and Volusia, have a high concentration of people working in Production occupations. This shows the importance of manufacturing within these communities. A more detailed analysis of the industry mixture will be offered in the Economic Trends Section of the document.

East Central Florida's Occupational Mix by Major Occupational Group



Occupations with Highest Concentration Levels in East Central Florida

Detailed Occupation	Occupational Group	High Concentration MSAs
Athletes and Sports Competitors	Arts, Design, Entertainment ,Sports and Media	Deltona, Orlando
First-Line Supervisors of Landscaping Workers	Building and Grounds Cleaning and Maintenance	Deltona, Villages
Pest Control Workers	Building and Grounds Cleaning and Maintenance	Deltona, Palm Bay, Orlando
Construction and Related Workers, All Other	Construction and Extraction	Deltona, Palm Bay
Helpers--Electricians	Construction and Extraction	Orlando, Villages
Roofers	Construction and Extraction	Deltona, Palm Bay
Health Technologists and Technicians, All Other	Health Care Practitioners and Technical	Deltona, Villages
Locksmiths and Safe Repairers	Installation, Maintenance and Repair	Deltona, Orlando
Amusement and Recreation Attendants	Personal Care and Services	Orlando, Villages
Electrical and Electronic Equipment Assemblers	Production	Deltona, Palm Bay
Fiberglass Laminators and Fabricators	Production	Deltona, Palm Bay
Transportation Security Screeners	Protective Services	Palm Bay, Orlando
Real Estate Sales Agents	Sales and Related	Deltona, Orlando, Villages
Telemarketers	Sales and Related	Deltona, Orlando
Commercial Pilots	Transportation and Material Moving	Deltona, Palm Bay

FREIDA, 2017

Labor Force Trends

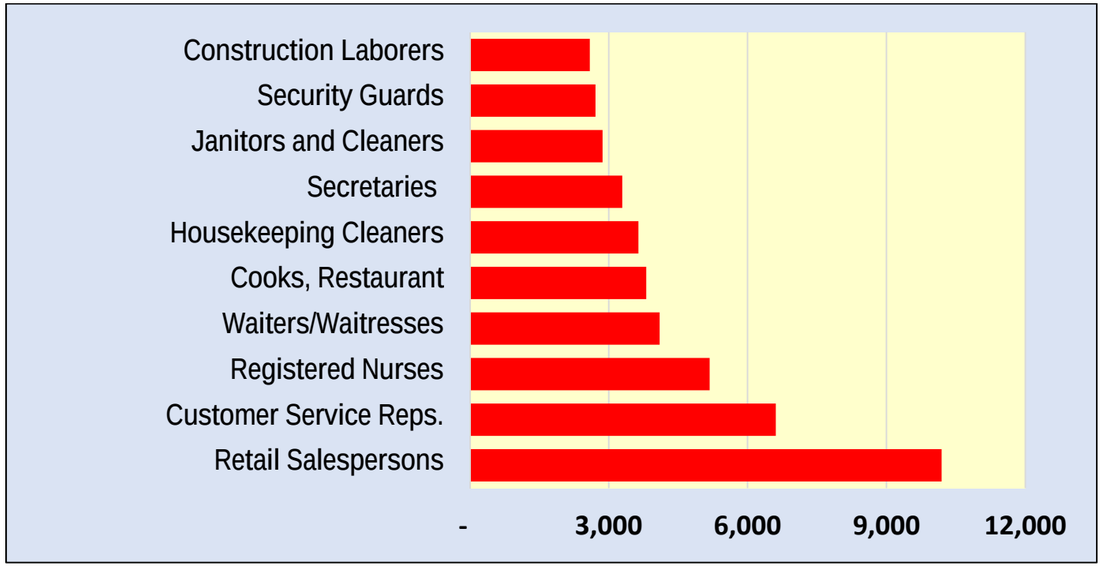
Occupational trend patterns can help illuminate the discussion about the future of East Central Florida's labor market and reveal where the regional economy is heading. Currently, FREIDA has projected job growth by occupation from 2016-2024. In East Central Florida, the occupation with the highest projected growth potential is Retail Sales Persons. It is projected to add over 10,000 jobs within the next eight years. People within this occupation sell different types of merchandise to consumers. Other dominant occupations include Customer Service Representatives (6,611), Registered Nurses (5,181), Waiters/Waitresses (4,100), and Restaurant Cooks (3,812).

There are two important findings from looking at the top ten occupations with the highest project growth. First of all, this group is dominated by professions within three major occupational groups: Building and Grounds Cleaning and Maintenance, Food Preparation and Serving, and Office and Administrative Support. Based on this information, it could be affirmed that the region's economy will continue to be driven by the service economy in the near future. Moreover, most of these occupations are low-wage jobs with a median annual pay of less than $35,000. The only exception is Registered Nurses which are paid an average of $63,000 a year.

Another way of analyzing labor force trends is by looking at the percentage change in occupational employment. This methodology better depicts the changes that are expected to occur in the region's occupational mix. Professions within the Health Care Practitioners Occupational Group are expected to increase more than 25% in the next eight years. This is part of a national trend that has seen an increase in health care jobs as the population continues to age. The median salary for these occupations ranges from $65,000 to $96,000.

Other high paying occupations within the region include Personal Financial Advisors ($105,387), Statisticians ($77,393), Physical Therapy Assistants ($61,160), and Operation Research Analysts ($64,150). However, not all of these are high paying positions. The median annual salary for this occupation is less than $23,000.

Occupations with Highest Projected Job Growth 2016-2024 (numbers)



Occupations with Highest Projected Job Growth 2016-2024 (percentage)

Occupational Title	Occupational Group	Projected Positions	Percent Change
Statisticians	Computer and Mathematical	310	45%
Nurse Practitioners	Health Care Practitioners and Technical	1,170	38%
Physician Assistants	Health Care Practitioners and Technical	500	36%
Physical Therapist Assistants	Health Care Support	620	35%
Diagnostic Medical Sonographers	Health Care Practitioners and Technical	720	31%
Operations Research Analysts	Computer and Mathematical	900	29%
Optometrists	Health Care Practitioners and Technical	300	28%
Home Health Aides	Health Care Support	2,560	28%
Physical Therapists	Health Care Practitioners and Technical	1,050	27%
Cement Masons and Concrete Finishers	Construction and Extraction	1,710	27%
Cardiovascular Technologists and Technicians	Health Care Practitioners and Technical	470	27%
Brickmasons and Blockmasons	Construction and Extraction	870	27%
Personal Financial Advisors	Business and Finacial Operations	1,100	27%
Roofers	Construction and Extraction	3,208	27%
Security and Fire Alarm Systems Installers	Installation, Maintenance and Repair	870	28%

*Includes only occupations with significant growth

FREIDA, 2017

Educational Attainment

An educated workforce is considered an important factor considered when attracting new industries to the region. Based on information from the American Community Survey, the East Central Florida's workforce has a relatively high level of education. Over 50% of all residents over the age of 25 have some level of education beyond a high school diploma. Seminole, Brevard and Orange counties are home to the most educated workforces within the region. As will be discussed later in the document, these counties are also home to several of the region's high tech industries. Overall, East Central Florida has a higher level of education than both the state of Florida and the nation.

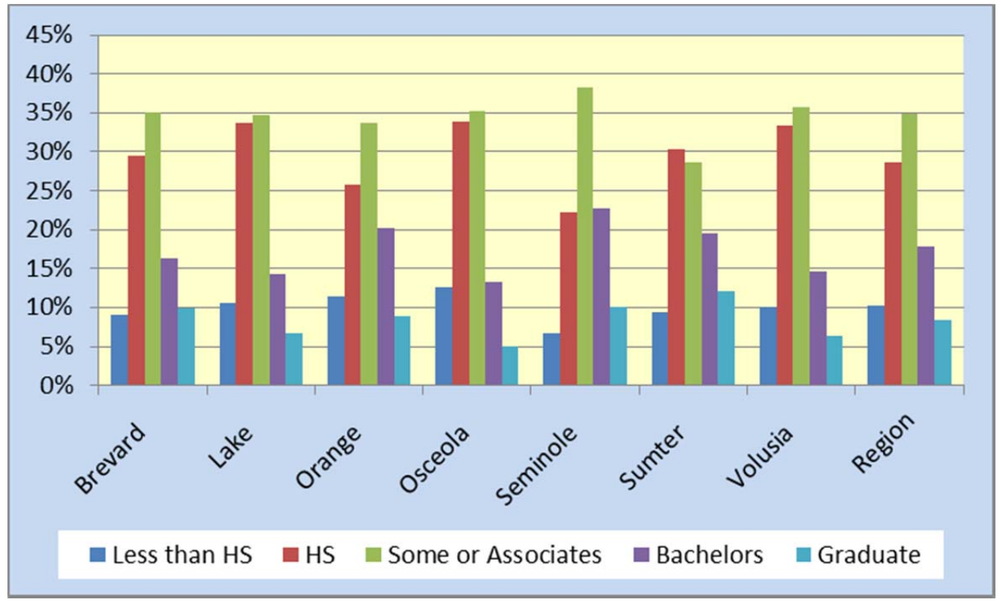
Workforce Gap Analysis

A skills gap is defined as the difference between the competencies and qualifications of the local workforce and the actual needs of the hiring industries. In 2014, three of East Central Florida's CareerSource offices (Brevard, Central Florida, and Flagler Volusia) partnered with the Florida High Tech Corridor to study how to better align the skills needed by area businesses with those seeking employment. The Central Florida Talent Gap Analysis consisted of an online survey sent to business of all sizes, which was supplemented with 21 interviews conducted with industry leaders from across the region. After these parts of the project were completed, the research team conducted five focus groups to help validate the survey results and gain additional insight about prospective solutions and partnership opportunities.

The Central Florida Talent Gap Analysis revealed that 61% of companies experience difficulty hiring qualified staff, which is slightly lower than the national rate. Employers stated that the biggest reasons for not filling new positions were lack of experience, technical and soft skills competencies, and available applicants. Manufacturing, Hospitality and Health Care were the industries that reported the greatest difficulty filling positions.

The study provides several recommendations to address the skills gap. These include expanding regional marketing efforts, the Quick Response and Incumbent Worker Training programs, the Career Pathways model, and other training opportunities for post-secondary students. The study also recommends increasing cross disciplinary skills development, allowing the marketing of jobs across CareerSource boundaries, and establishing peer-to-peer groups between businesses and education networks.

Educational Attainment by County



Regional Best Practices: Lake Tech Manufacturing Center

Lake Technical College is breaking ground on its new facility, the Center for Advanced Manufacturing. Opening in September 2017, the education center will feature training in welding, machining, fabrication computer numerical control programming and more. The center is in response to a high demand for education in manufacturing, as evidenced by comparable local classes being at maximum capacity. In total, the facility will cost $8.8 million, through a mix of public and private funding sources, including County and State governments, local school board, and donation from a local private manufacturing firm.

Measuring East Central Florida's Workforce

In August 2016, the EDA created the Innovation Index to compare the performance of the nation's 384 economic development districts in four component areas. One of these areas is referred to as the Human Capital and Knowledge Creation Index. It measures the degree to which a county's labor force is able to engage in innovative activities. This category is comprised of the following measurement areas:

- **Annual Average Growth Rate for Population Ages 25 to 44**: People within this age range are considered to be less risk averse and more entrepreneurial, thus they tend to engage in more innovative activities.
- **Educational Attainment**: Includes the population between 18-24 years with a high school diploma and those 25 and older that have some level of post-graduate education.
- **Knowledge Creation and Technology Diffusion***:* Describes how likely are new technologies and knowledge creation to spread across neighboring counties and regions based on the diffusion of patent technologies (volume of patents and technology class), university-based knowledge spill overs (research and development spending on science/engineering fields and distance between the university and county region), and the density of business incubators within the region (number of business within 50 miles of the region).
- **STEM Education and Occupations***:* This includes the number of STEM degree graduates per 1,000 people from higher education institutions, the concentration of jobs that apply high-tech (scientists and engineers) based on the employment share relative to total employment, and the region's share of employment in high-tech industries.

The East Central Florida region ranked 34th in the nation in the Human Capital and Knowledge Creation Index. The region ranked well in patent diversity and job growth to population growth ratio, but fell short on other measures such as cluster diversity and strength and gross domestic product. These last two findings confirm some of the trends found in the regional economic analysis, which shows the overwhelming dominance of leisure and hospitality industries in East Central Florida's economy.

Human Capital and Knowledge Creation Index	
Measurements	•Annual Average Growth Rate Population 25-44 •Educational Attainment •Knowledge Creation & Technology Diffusion •STEM Education and Occupations

Source: Stats America, 2017

Towards Population and Labor Supply Resiliency

This population and labor force trend analysis confirms the importance of population growth to the East Central Florida regions vitality. The region has added more than 1.5 million residents during the past 25 years and this high growth rate is expected to continue until 2040. It benefits from the high number of economic and international migrants seeking new job opportunities and a better quality of life. During the time covered by this trends study, the region should have enough workers to replace the aging workforce. Moreover, the educational attainment level of East Central Florida's labor force is higher than the nations. However, the region's labor participation rate is lower than the nations in part because of the large number of retirees moving to East Central Florida. While they do not work for a paycheck, these retirees bring a variety of skills that could be put to good use in the region. At the same time, East Central Florida communities need to prepare for the expected increase in elderly residents.

The occupational analysis found 43% of the region's workforce is employed in service jobs within three major occupational groups: Office and Administrative support, Sales and related occupations, and Food Preparation and Serving Jobs. While the transition from production to service jobs is a national trend, it seems to be deeper in East Central Florida. Moreover, the occupations with the highest projected openings are Retail Sales Person, Customer Services Representatives, Registered Nurses, Waiters/Waitress and Restaurant Cooks. Most of the people working within some of these occupations earn less than $35,000 a year. Again, while this dependence of service jobs is a national trend, it seems to be more pronounced in East Central Florida because of its high volume of retirees and its dependence on leisure industries.

Finally, according to the East Central Florida Gap Analysis, the region's businesses are having a tough time recruiting people to fill their open positions. The manufacturing and health care industries showed the higher difficulties in recruiting qualified workers. Both of these industries offer pathways to training and higher paying careers.

Demographic Trends Analysis Major Highlights

***S**trengths:*

- Strong Population Growth
- High Level of Educational Attainment
- Growth in Health Care Occupations

***W**eaknesses:*

- Low Labor Force Participation Rate
- Prevalence of Low Paying Occupations
- Growing Skills Gap

ECONOMY

Economic Structure

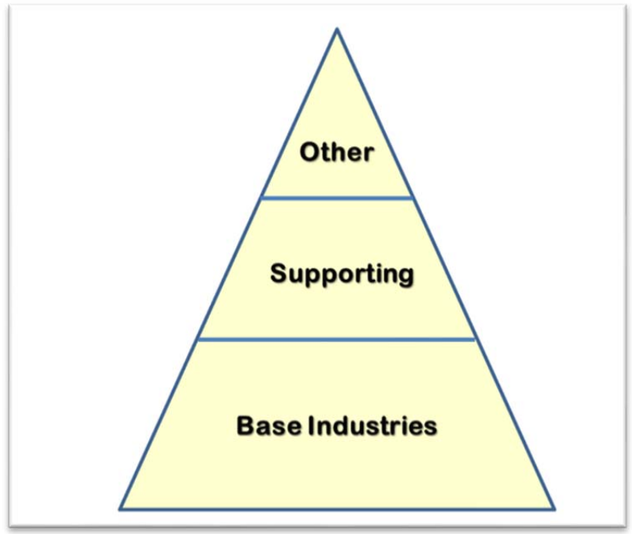
When analyzing economic trends, it is imperative to understand the underlying structure of the region's economy. The term economic structure simply refers to the distribution of economic activity by industry in a regional economy. Industrial structure not only influences the region's employment patterns, but it also has significant effects on business trade flows (inter-industry spending patterns), occupations, income generation, and other economic variables. Most important for the CEDS process is to identify those industries that are driving economic growth within the region.

According to REMI, in 1990 the dominant economic super sectors in East Central Florida were Trade, Transportation and Utilities (TTU), Leisure and Hospitality, and Professional and Business Services. The TTU super sector is comprised of four industrial sectors: Wholesale Trade, Retail Trade, Transportation and Warehousing, and Utilities. Leisure and Hospitality consists of establishments within the Arts, Entertainment, and Recreation and Accommodation, and Food Services sectors. Finally, Professional and Business Services is another broad super sector that encompasses a variety of industries that provide specialized services. These include three sectors: Professional, Scientific, and Technical Services, Management of Companies and Enterprises, Administrative and Support, Waste Management, and Remediation Services.

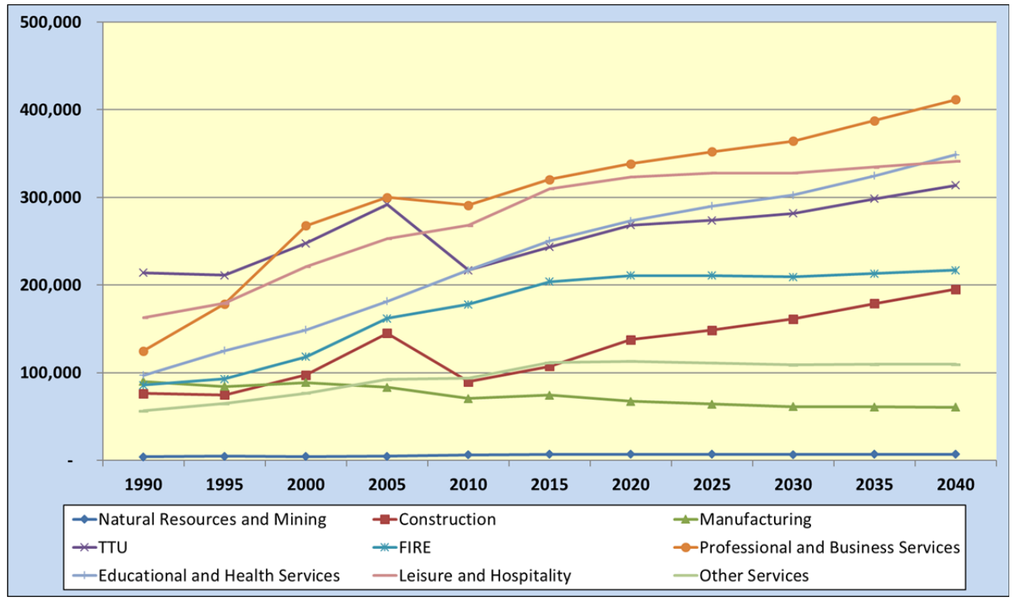
The region's economic structure started shifting in the 2000s. Both Professional and Business Services and Leisure and Hospitality started to overtake TTU as the dominant super sectors. Moreover, between 2010 and 2015, the Educational and Health Services super sector rose ahead of TTU. The REMI forecast has these three super sectors dominating East Central Florida's economy through 2040.

While this trend analysis provides a good overview of the East Central Florida's changing economy, its information is too aggregated to give any good insights about the region's industry structure. Because of this reason, the ECFRPC decided to use data from the U.S. Census County Business Patterns (CBP) create a more accurate analysis of change by industry. This analysis compares data from 1998 and 2014. The information is organized using the North American Industry Classification System (NAICS) at the six-digit industry level (most disaggregated). This required the ECFRPC to look at data from over 600 different industries.

Regional Industry Structure



East Central Florida Employment Trend Analysis by Economic Super Sector 1990-2040



Source: REMI model v. 1.7

East Central Florida Industry Trends

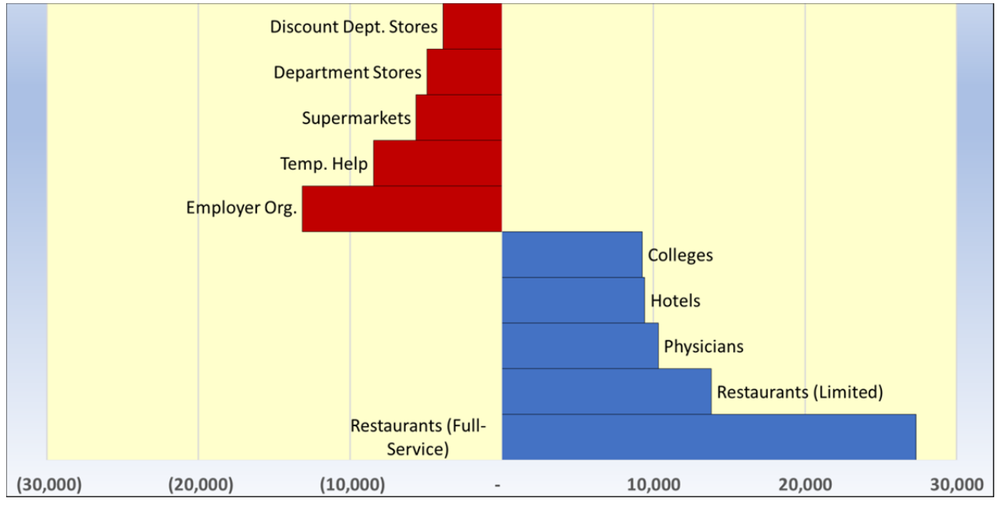
The first part of the economic trends analysis is to identify the industries that gained and lost the highest number of jobs during the study period. This would help to identify structural changes in East Central Florida's economy. It is important to note that the NAICS system suffered some major changes across particular industries that reflected overall changes in the economy. For example, several manufacturing industries were consolidated due to their decline at the national level. In addition, the rise of the internet led to the creation of new industries within the information and retail sectors. Using CBP employment data, the ECFRPC worked to identify the biggest winners and losers among the region's industries.

Overall, there were 93 industries that gained at least 1,000 employees during the 16-year study period. The largest employment gainers were restaurants (full-service and limited) with over 52,000 new jobs. Other large employment gainers were Doctor Offices (10,315), Hotels (9,411), Colleges (9,271). Other industries that created more than 5,000 jobs were Theme Parks (9,224), Family Clothing Stores (8,461), Corporate and Regional Headquarter Offices (8,248), Telemarketing Bureaus (8,088), and Home Centers (8,031). Most of these industries are either tied to the Leisure and Hospitality super sector or increased jobs to serve East Central Florida's growing population.

In contrast, there were more than 300 industries that lost jobs during this period. Leading in job losses were Professional Employer Organizations (13,170), Temporary Health Services (8,463), Supermarkets (5,665), Department Stores (4,926), and Discount Department Stores (3,861). Most of these losses were in the retail sector and could be partly attributed to the aggressive expansion of certain vendors (Walmart) and the rise of e-commerce.

There were 15 other industries that lost more than 1,000 jobs. These losses could be attributed to a variety of factors and events including the collapse of the real estate market during the recession (New Single-Family Housing Construction, Building Material Dealers, Masonry Contractors), the end of the Space Shuttle Program (All Other Support Services), the move of manufacturers to Southeast Asia (Semiconductor and Related Products, Other Commercial and Service Machinery, Other Electronic Parts and Equipment Wholesalers, Telephone Apparatus, and Bare Printed Circuit Boards), and changes in consumption patterns (News Paper Publishers, Cable and Other Programming Distributors, Video Tape and Disc Rental, and Commercial Printing).

Region's Top Winning and Losing Industries by Employment 1998-2014



Sources: CBP 1998 and 2014

Shift Share Analysis

While knowing the industries that are gaining or losing jobs is important, it is pivotal to understand the reasons why these changes occurred in the first place. The shift share analysis methodology helps to differentiate between the regional employment changes driven by local factors versus those provoked by national and industry trends. Thus, it compares industry changes at the regional and national level. Shift Share analysis partitions local employment into three distinct components: the national share, which reflects trends in the U.S economy; the industrial mix, which includes industry factors; and regional trends, which points to local competitive advantages and weaknesses.

The industries that gained the largest number of employees in East Central Florida mostly grew because of favorable conditions at the national level. On the other hand, most of the largest employment losses of could be attributed to particular changes within these industries. Several industries did experience employment growth or declines because of local competitiveness factors. For example, job growth in the College and Universities industry is probably a result of the University of Central Florida's (UCF) efforts to become the second largest university in the nation. Several of the region's economic development organizations have also targeted the recruitment of call centers to the region. Finally, the demand for new homes has probably spurred the rise of home center stores across East Central Florida. On the other hand, it seems that the region lost jobs in Employment Organizations because of regional competitiveness issues.

Besides these previous industries, the shift-share analysis identified 21 other industries that added more than 1,000 jobs because of regional factors. Of these, the nine largest industries by total employment were: All Other Travel Arrangement Services (4,164), Other Activities Related to Credit Intermediation (3,130), Data Processing and Hosting (3,907), Advertising Agencies (2,806), Site Preparation Contractors (2,566), Mail Order Houses (2,136), Specialty Hospitals (1,935), Industrial Machinery and Equipment Wholesalers (1,915), and Other Warehousing and Storage (1,849). These large employment gains suggest that these are industries where East Central Florida is economically competitive.

Regional Industry Winners

Industry Sector	National	Industry	Regional
Full-Service Restaurants	✓		
Limited-Service Restaurants	✓		
Physician Offices	✓		
Hotels and Motels	✓		
Colleges and Universities			✓
Amusement and Theme Parks	✓		
Family Clothing Stores	✓		✓
Corporate Subsidiaries	✓		
Call Centers			✓
Home Centers			✓

Regional Industry Losers

Industry Sector	National	Industry	Regional
Employment Organizations			✓
Temporary Agencies		✓	
Supermarkets		✓	
Department Stores		✓	
Discount Department Stores		✓	
Footwear Manufacturing		✓	
New Single-Family Housing Contractors		✓	
Semiconductor Manufacturing		✓	
Other Building Material Dealers		✓	
All Other Support Services		✓	

Sources: CBP 1998 and 2014

Industry Concentration

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 goods and services than needed to satisfy local demand, which means that these products would need to be imported.

The ECFRPC prepared a LQ analysis for all of East Central Florida's industry sectors, with a special focus on those that employ at least 1,000 people. Based on this criteria, the region's highest LQs were for a diverse group of industries that serve the Leisure and Hospitality sector. These include Amusement and Theme Parks, Hotels and Motels, All Other Travel Arrangement, Passenger Car Rental, Photography Studios, Racetracks, Deep Sea Passenger Transportation, Charter Bus Industry, and Tour Operators. East Central Florida has specialized in two manufacturing industries: Search, Detection and Navigation Instrument Manufacturing and Boat Building. Finally, the Flight Training industry's high location quotient is probably related to the Modeling Simulation and Training industry.

Industries with High Employment and High Location Quotients

Industry	LQ	# of Employees	Economic Sectors
Hotels and Motels	3.50	57,052	Leisure and Hospitality
Amusement and Theme Parks	28.28	44,087	Leisure and Hospitality
Search, Detection Instrument Manufacturing	6.14	8,370	Manufacturing
All Other Travel Arrangement Services	7.13	7,354	Leisure and Hospitality
Other Activities Related to Credit Intermediation	3.34	3,450	Financial
Passenger Car Rental	3.50	2,845	Leisure and Hospitality
Photography Studios, Portrait	4.66	2,249	Leisure and Hospitality
Racetracks	4.37	2,135	Leisure and Hospitality
Tobacco Wholesalers	3.70	1,955	Other
Executive Search Services	5.46	1,903	Other
Deep Sea Passenger Transportation	9.23	1,750	Leisure and Hospitality
Boat Building	5.55	1,705	Manufacturing
Charter Bus Industry	4.57	1,635	Leisure and Hospitality
Flight Training	10.50	1,581	Aviation
Tour Operators	3.40	991	Leisure and Hospitality

Sources: CBP 1998 and 2014

Regional Innovation

One of the harbingers of regional economic competitiveness is the level of innovation. The ECFRPC used data from the U.S Patent and Trademark Office to identify the technologies and industries that are driving innovation within East Central Florida. According to this data, East Central Florida's organizations and individuals were awarded a total of 8,472 patents between 2000 and 2015. At number 58, Palm Bay is the highest ranked metropolitan statistical area in East Central Florida in terms of patent awards. It also accounts for 48 percent of the region's patents. The Palm Bay MSA is followed by Orlando (62) and Deltona (86) in ranking. The Villages MSA had less than 10 patents awards during this period. It is difficult to assess the relevancy of these rankings since the top MSAs also have larger population counts than our region. However, for comparison purposes, the Miami MSA was awarded 12,923 patents and the Tampa Bay MSA received another 5,491 during the same period.

When assessing East Central Florida's innovation competitiveness, it is more important to examine the region's progress in the individual patenting technologies. The U.S. Patent Classification Systems has over 400 classes. East Central Florida's metro areas have mostly specialized in the same patenting classes. The technology class with the highest number of patents was Multiplex Communications (385) followed by Semiconductor Device Manufacturing (291) and Telecommunications (290). Based on ECFRPC research, most of these patents can be associated to particular industries including communications technologies, turbines, vehicles, and photonics.

East Central Florida metros rank among the ten highest in the nation for several patenting technologies. For example, the Palm Bay MSA ranks third on Radio Wave Antennas and eighth in Waves Transmission Lines and Networks. Metro Orlando is ranked eighth in the nation in Rotary Motors technology class and tenth in the Power Plants and Impellers classes.

Another positive driver of innovation is the research performed by the region's universities. With a total of 56 patents obtained in 2016, the University of Central Florida (UCF) ranked 41st among the world's universities. However, based on ECFRPC research, UCF was not among the organizations awarded patents within the region's predominant technology classes. Therefore, the private sector plays a much bigger role in regional innovation.

Technology Classes with Highest Number of Patents in East Central Florida

Patenting Technology Classes	# of Patents in Region
Mulitplex Communications	385
Semiconductor Device Manufacuring	291
Telecommunications	290
Radio Wave Antennas	286
Solid-State Devices	197
Power Plants	222
Pulse or Digital Communications	163
Communications: Directive Radio Wave Systems	130
DP: Vehicles, Navigation	111
Rotary Kinetic Fluid Motors or Pump	104

Highest Ranking Patent Technology Classes by MSA

Radio Wave Antennas
Palm Bay's National Rank #3

Rotary Technologies
Orlando's National Rank #8

Boats
Deltona's National Rank #39

Source: U.S. Patent and Trademark Office

East Central Florida's Innovation Clusters

For the past three years, the ECFRPC has been working to identify the industry clusters driving economic competitiveness within the East Central Florida region. An industry cluster is defined as a regional concentration of inter-related industries that mainly export their goods and services. These business networks are the most important wealth creators within the region. When selecting the region's innovation clusters, the ECFRPC focused on the following attributes. First, these industries must show a high level of concentration within the region based on location quotients. Moreover, they need to have a strong presence in at least two of East Central Florida's counties. There must also be an implicit relationship between these businesses such as producer-supplier ties. Finally, these clusters need to show a high level of innovation based on the number of patents awarded.

Based on these characteristics, the ECFRPC has initially selected seven regional innovation clusters: Tourism, Avionics, Boats and Other Marine Vessels, Photonics, Turbines, Modeling Simulation and Training, and Telecommunications. A general overview of these clusters is provided within the next pages.

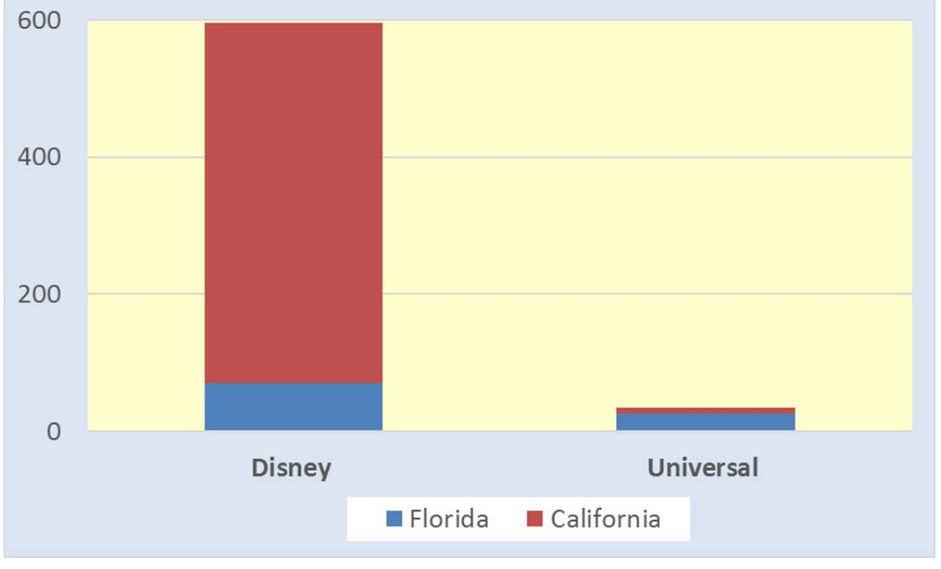
Tourism

Tourism is by far the region's largest and most comprehensive cluster. It hosts a wide-ranging network of industries such as theme parks, accommodations, transportation (air and ground), travel arrangement services, among others. East Central Florida communities offer a multiplicity of experiences to visitors coming from other parts of the country and the world. The epicenter of tourist activity is Metro Orlando, which recently became the nation's most visited destination with 68 million visitors in 2016. East Central Florida's success is predicated by the high number of innovative technologies and experiences developed by the theme park companies to improve the overall guest experiences. These include the creation of new rides, themed environments, and reservation wrist-bands.

Based on ECFRPC research, most of the theme park patents were awarded to the companies' California headquarters. However, having the most visited theme parks in the nation makes Orlando the main focus market for most of these technologies.

Creation of Themed Lands at Disney and Universal

Number of Patents Awarded to Theme Park Companies by State



Source: U.S. Patent and Trademark Office

Boats and Other Vessels

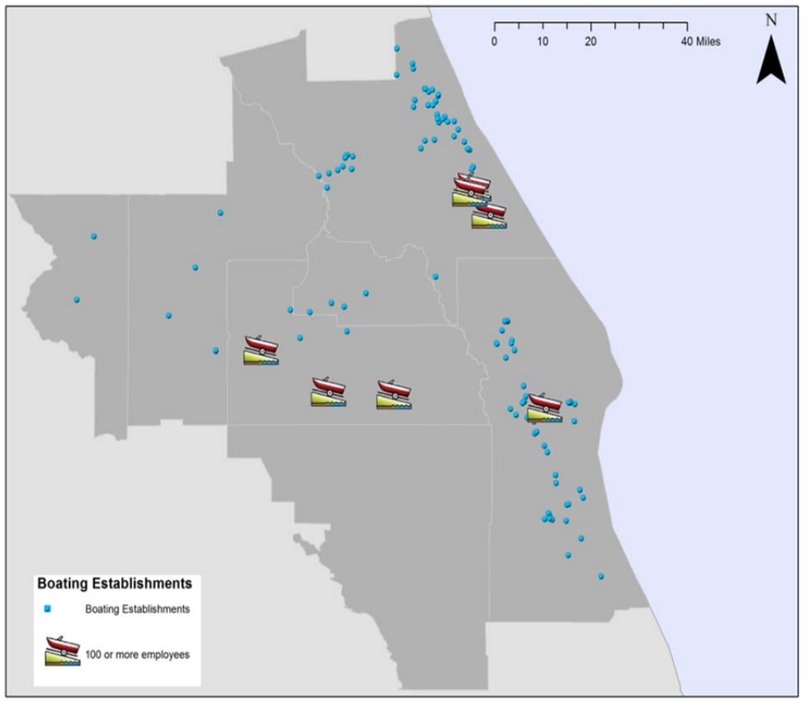
East Central Florida's Boats and Other Vessels cluster is one of the region's largest industry agglomerations. It is comprised of 124 companies including boat manufacturers, machine shops and other makers of boat parts and accessories, product suppliers, and marinas that provide repair services, among others. While these businesses are distributed throughout East Central Florida, the vast majority of them are located within Brevard (49) and Volusia (56) counties. Volusia County is home to three of the region's largest boat manufacturers: Boston Whaler, Everglades Boats, and Edgewater Power Boats. Other large employers within this industry include Sear Ray Boats in Brevard County and Regal Marine Industries and Nautique in Orange County.

The Boats and Other Vessels Cluster also displays a high level of innovation. It is responsible for about 185 technology patents. Moreover, several of these companies have started to develop other applications for the composites and fiberglass materials used to build boats.

Aviation

East Central Florida is home to more than 140 aviation companies. For the purpose of this analysis, the aviation cluster includes all establishments that manufacture aircraft, avionics instruments and other airplane parts, software and navigation tools, and related services. The heart of East Central Florida's aviation cluster is Brevard County. Not only is the Space Coast home to Kennedy Space Center, it also hosts large facilities for companies such as Boeing, Embraer, and Rockwell Collins, among others. There are also several aviation companies located within Orange (34) and Volusia (24) counties. The region is also home to the Florida Institute of Technology (FIT) and Embry Riddle Aeronautical University (Embry Riddle), two of the nation's premiere aviation and aerospace training institutions. East Central Florida's aviation cluster is responsible for about 696 technology patents.

Distribution of Boating Companies in East Central Florida



Source: Infogroup, ECFRPC research

Embraer is a Brazilian-based Aerospace conglomerate. The company has a manufacturing facility in Melbourne, Brevard County. The facility produces four Embraer aircraft models and employs around 300 people.

Photonics

Photonics is the science of harnessing particles of light for a wide variety of technological applications including lasers, sensors, and other medical instruments. In 1987 UCF started the Center for Research and Education in Optics and Lasers, which less than 20 years later became the College of Optics and Photonics. Because of this effort, today East Central Florida has one of the largest Photonics clusters in the nation. It is comprised of over 75 companies located within Brevard, Orange, and Seminole counties. Most of these establishments are defense companies or produce other machines that use laser technologies. These companies were awarded over 500 patents between 2000 and 2013.

Modeling Simulation and Training (MS&T)

Another cluster that has benefited from its partnership with UCF is the Modeling Simulation and Training Industry. The ECFRPC was able to identify 184 companies, the vast majority of which are located near the university's Central Florida Research Park. This MS&T cluster's genesis occurred in the mid-1960s when the Naval Training Systems Center moved to Orlando from Long Island, NY. Besides being home to over 100 companies, Central Florida Research Park is also the location of several supporting establishments like the Joint Training Integration and Evaluation Center, the National Center for Simulation, and UCF's Institute for Simulation and Training.

MS&T companies specialize in providing training services for the different branches of the U.S. military. However, the industry has started to branch out to supply services to other sectors including aviation, entertainment, medical technologies and transportation. The ECFRPC was able to identify about 50 technology patents associated with this cluster.

Regional Case Study: Osceola County

Osceola County has partnered with the University of Central Florida, Belgian nanotechnology research firm Imec and locally-based telecommunications firm Harris to develop a high-tech research facility, called Bridging the Innovation Development Gap (BRIDG). The 109,000 square-foot facility will be housed in the Florida Advanced Manufacturing Center just outside of Kissimmee city limits, in an area currently being branded as "Neo City". The construction project alone costed more than $70 million, with $15 million from state funding. The organization will employ over 50 people and Imec has committed to inserting at least 100 of its high-tech employees to the newly-completed facility in the next five years.

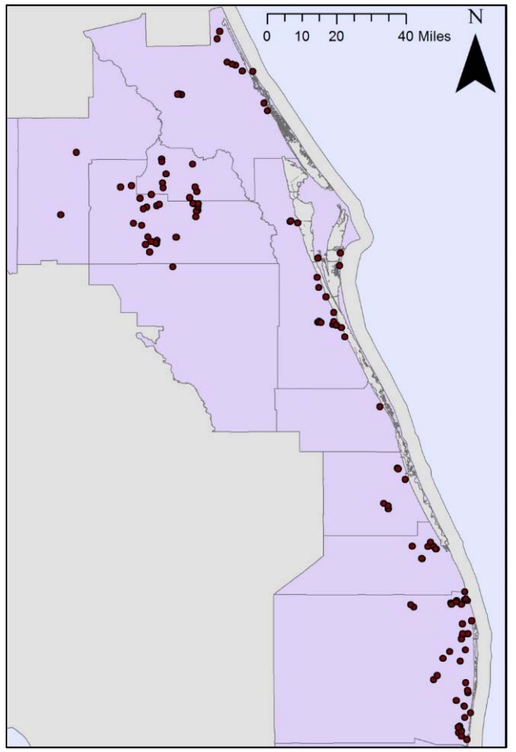
Turbine Technologies

The convergence of technologies developed by the region's gas turbine and aircraft industries led to the origin of East Central Florida's turbine cluster. Today, the technologies developed by these industries have a variety of applications including aerospace propulsion, clean power generation, and oil and gas exploration. East Central Florida has over 70 companies that work in the design and development of turbines including two company headquarters: Siemens Energy (Orlando) and Mitsubishi Power Systems (Lake Mary). However, Florida's turbine cluster is much larger as it includes more than 130 establishments spanning over ten counties. The cluster also shows a high level of innovation. Three Florida MSAs (Miami, Orlando, and Port. St. Lucie) are ranked within the top ten in the nation for patent awards in the Rotary, Kinetic, Fluid Motors Class. Other patent technology classes associated with this cluster are Power Plants, Electric Generator, and Impellers.

Antennas and Telecommunications

This cluster is comprised of 98 establishments, most of which are located in Brevard County. This is not surprising as Palm Bay is home to Harris Corporation's company headquarters. The 464,000 square foot building housed over 1,400 scientists and engineers. Companies within this industry cluster work on a variety of technologies including RFID communications, digital communication systems, and a variety of antenna and receiver designs. While the bulk of this activity is concentrated in Brevard County, the development of innovative communication technologies spans throughout the region. According to the U.S Patent Trademark office, the East Central Florida region was awarded over 1,000 patents in communication technology classes such as Multiplex Communications, Radio Wave Antenna, Pulse or Digital Communications, among others. Patent awards were distributed among all metropolitan areas, which leads the ECFRPC to believe that several of the region's defense companies may also be involved within this cluster.

Florida's Turbine Cluster



Sources: Infogroup, ECFRPC research

Regional Case Study: Brevard County

In 2011, EDA awarded the City of Palm Bay a $2.8 million Public Works Grant that went towards paying for critical infrastructure site improvements for Harris Corp. new corporate headquarters.

East Central Florida's Entrepreneurship Ecosystem

The Kaufman Index of Entrepreneurship is a tool used for measuring entrepreneurship at the national, state, and metro levels by focusing on the Rate of Startup Growth, the Region's Share of Scale Ups, and High Growth Company Density.

The **Rate of Startup Growth** measures the average growth of new employer firms from the year they were founded through their fifth year of operation. For example, a 25% rate means that those companies turning five years old have grown 25 percent since their founding.

The **Share of Scaleups** assesses the percentage of surviving companies that become medium or large businesses (50 or more employees) by their 10th year. For example, a ten percent share of scaleups means that 100 out of every 1,000 companies grew to 50 or more employees by the end of this timeframe.

Finally, the **High-Growth Company Density** component is comprised of all businesses with at least 20% annualized revenue growth over a three year period and at least $2 million in revenue. This measurement is calculated for every 100,000 employer businesses located within the region.

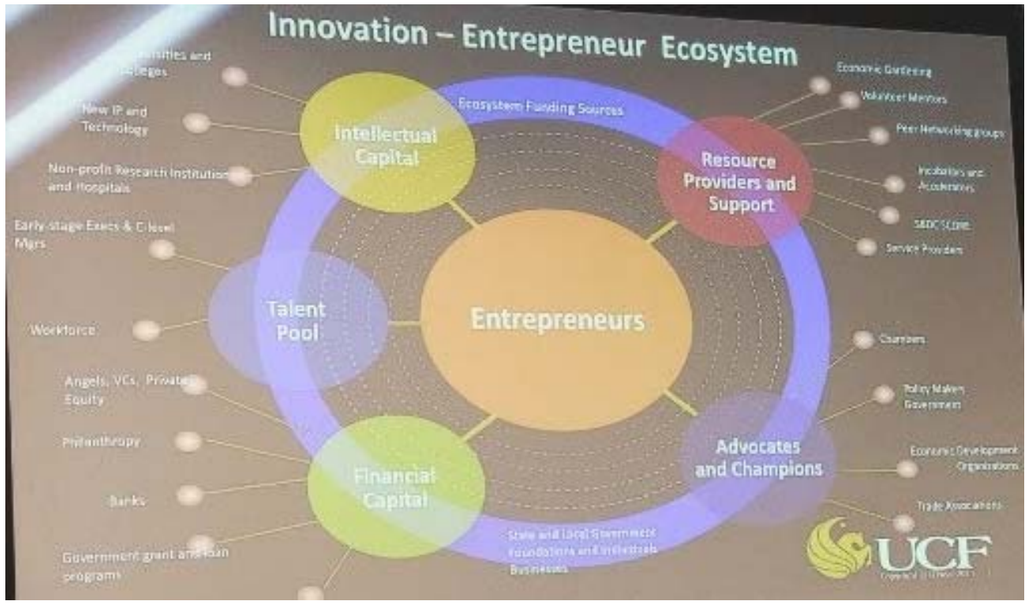
According to Kauffman, the Orlando MSA ranked 34th in entrepreneurship when benchmarked against the nation's 40 largest metro areas. This relatively low ranking may be a reflection of Orlando's status as a young up and coming metro. Moreover, Orlando moved up two notches from its 2015 ranking. The metro ranked the best in the High Growth Density component where it placed 15th in the nation. In fact, Orlando had the fifth highest density of high-growth health companies in the nation. It had a 17.5 high growth firms for every 100,000 businesses.

Orlando Metro Entrepreneurship Rankings

Measurement	Score
Total Index Score	0.63
Rate of Starup Growth	37.3%
Share of Scaleups	1.03%
High-Growth Company Density	117.2

Source: 2016 Kauffman Index of Entrepreneurship

East Central Florida's Entrepreneurship Ecosystem



Measuring East Central Florida's Innovation and Economic Competitiveness

The Economic Development Administration's Innovation Index is a composite measure that ranks the nation's 384 economic development districts based on a variety of economic indicators. East Central Florida's economic dynamism is reflected in its high rankings on the Business Dynamics (15th) Business Profile (31st), and Employment and Productivity (175th) indexes. These are all explained in more detail below.

The Business Dynamics Index assesses the region's creative destruction process where old inefficient firms are replaced with new innovative ones. The creation of new establishments stimulates competition and encourages older firms to ditch inefficient practices, which drives overall economic growth. This major index is comprised of two measurements:

- **Establishment Formation and Dynamics**: These includes total new business locations, share of new export businesses to total establishments, total new jobs created by these businesses, and changes in the rate of business formation overtime. It also takes into account the ratio of businesses that are increasing employment against those businesses that are reducing employment, the degree to which new businesses are replacing failed businesses, and the balance between export and local businesses.

- **Venture Capital**: This refers to the amount of capital available to commercialize new technologies and expand innovative companies. According to the Indiana Business Research Center, venture capital may be responsible for up to 14% of all innovative output activity in the nation. This measurement looks at the average amount of venture capital to all companies, expanding enterprises, and high tech firms. In addition to these figures, it also considers the total number of initial public offerings (IPOs) and venture capital deals that regions negotiated. All These figures were averaged over ten years and scaled by the region's average gross development product over that period. Finally the index also measures trend changes in venture capital financing and capital deals.

Business Dynamics Index	
Measurements	•Establishment Formation •Establishment Dynamics •Venture Capital Dollars •Venture Capital Count

Business Dynamics Index

15

Rank of 384 EDDs

The Business Profile Index gauges the region's business structure and the resources available to entrepreneurs such as foreign capital and broadband connectivity. The measurements are described in more detail below:

- **Foreign Direct Investment Attractiveness**: This measurement assesses how enticing the region is to attracting new capital from both foreign and domestic investors from outside the region. It calculates the ratio of new employment created by these investments and the average dollars brought to the region.

- **Online Connectivity:** This includes broadband density (fixed high-speed internet connections per 1,000 residents) and penetration (average annual change on fixed connections).

- **Dynamic Industry Profile:** This measurement calculates the average number of small (less than 20 employees) and large (500 or more employees) firms from 2002 to the present. It also takes into account the relative youth of the region's high-tech firms by comparing it to the national average.

- **Proprietorship**: This measurement captures the ownership aspect of entrepreneurship by looking at the regional rate of business proprietors and the changes in proprietorship rate. It also compares proprietor earnings (entrepreneur income) to total wages and salaries (employee income) and calculates total access to capital.

Business Profile Index	
Measurements	•Foreign Direct Investment Attractiveness •Online Connectivity •Dynamic Industry Profile •Proprietorship

Business Profile Index

31

Rank of 384 EDDs

The Employment and Productivity Index describes economic and job growth, regional desirability, and the outcomes of innovative activity by focusing on the following measurements:

- **Job Growth to Population Growth Ratio**: Calculates whether employment has been rising faster than population growth (2002 to the present).

- **Change in Share of High-Tech Industry Employment**: Home-grown, high-tech firms are important for region's economic growth. This measurement quantifies the degree in which the selected area's high-tech jobs are increasing or declining in concentration or importance.

- **Industry Performance**: This measurement examines the region's industry clusters by focusing on their diversity (spread of industries), strength (level of dominance of particular industries) and growth factor (percentage of employment growth that can be attributed to the selected industry clusters).

- **Gross Domestic Product (GDP):** This productivity measurement is comprised of the economic output per worker (for a single year) and the change in GDP per worker from 2002 to the most current information available.

- **Patents**: The Employment and Productivity Index quantifies a variety of patent-related measures including the change in (average) patenting rate, which compares the three year average of patents per 1,000 workers at the beginning of a ten-year time frame to the most recent three-year average. Another factor is patent diversity, which compares the diversity of patent making in the region to the national score for the latest three years available. Finally, the patents by institution-type categorizes the number of patents for five institution types, from individuals to companies to government.

Employment and Productivity Index	
Measurements	•Job Growth •Change in Share of High Tech Employment •Industry Performance •Gross Domestic Product •Patents

Employment and Productivity Index

175

Rank of 384 EDDs

Moving Towards a Resilient Economy

Based on the results of this trends analysis, East Central Florida is a dynamic economy that has continued to add jobs at a robust pace. Most changes to the region's economic structure could be attributed to the national economy's "creative destruction" process which drove job losses because of heightened competition, one-time events, and changing consumer tastes. On the other hand, these national trends also solidified employment growth in food and accommodation services, health care, and corporate subsidiary industries. According to the REMI forecast, economic growth is expected to continue over the next 25 years driven by the Professional and Business Services, Leisure and Hospitality, and the Educational and Health Services economic super sectors.

Probably the biggest weakness of East Central Florida's economy is its high reliance on the Leisure and Hospitality sector and its associated industries. According to EDA's Innovation Index, this strong dependence on service jobs is affecting the region's productivity levels and the economic well-being of its residents. This finding is also supported by United Way's ALICE report which states that 42% of East Central Florida's households live paycheck to paycheck.

On the positive side, this analysis also shows that East Central Florida is home to several competitive high technology clusters that offer great opportunities to further diversify the region's economy. These regional innovation clusters are Boats and Other Vessels, Aviation, Photonics, Modeling Simulation and Training, Turbine Technologies, and Antennas and Telecommunications. While innovation seems to have taken a hold on the region's economy, there needs to be a stronger connection between the research activities of the region's academic and private sectors.

Economic Trend Analysis Major Highlights

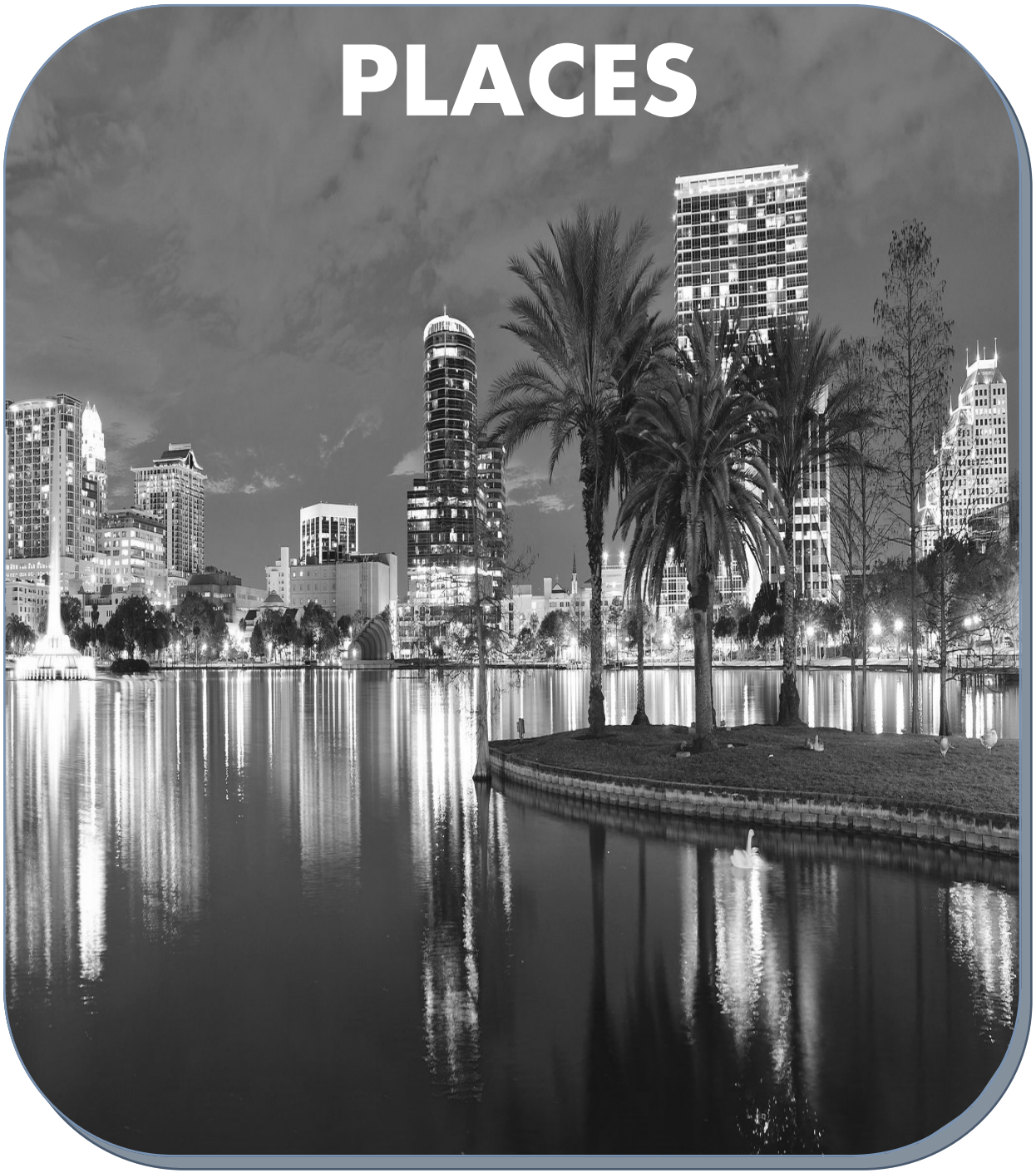
Strengths:

- Strong Job Growth
- Growing Innovation Economy
- Strong Technology Clusters

Weaknesses:

- High Dependence of Tourism
- Low Patent Activity Numbers
- Academia/Private Sector Disconnect

PLACES



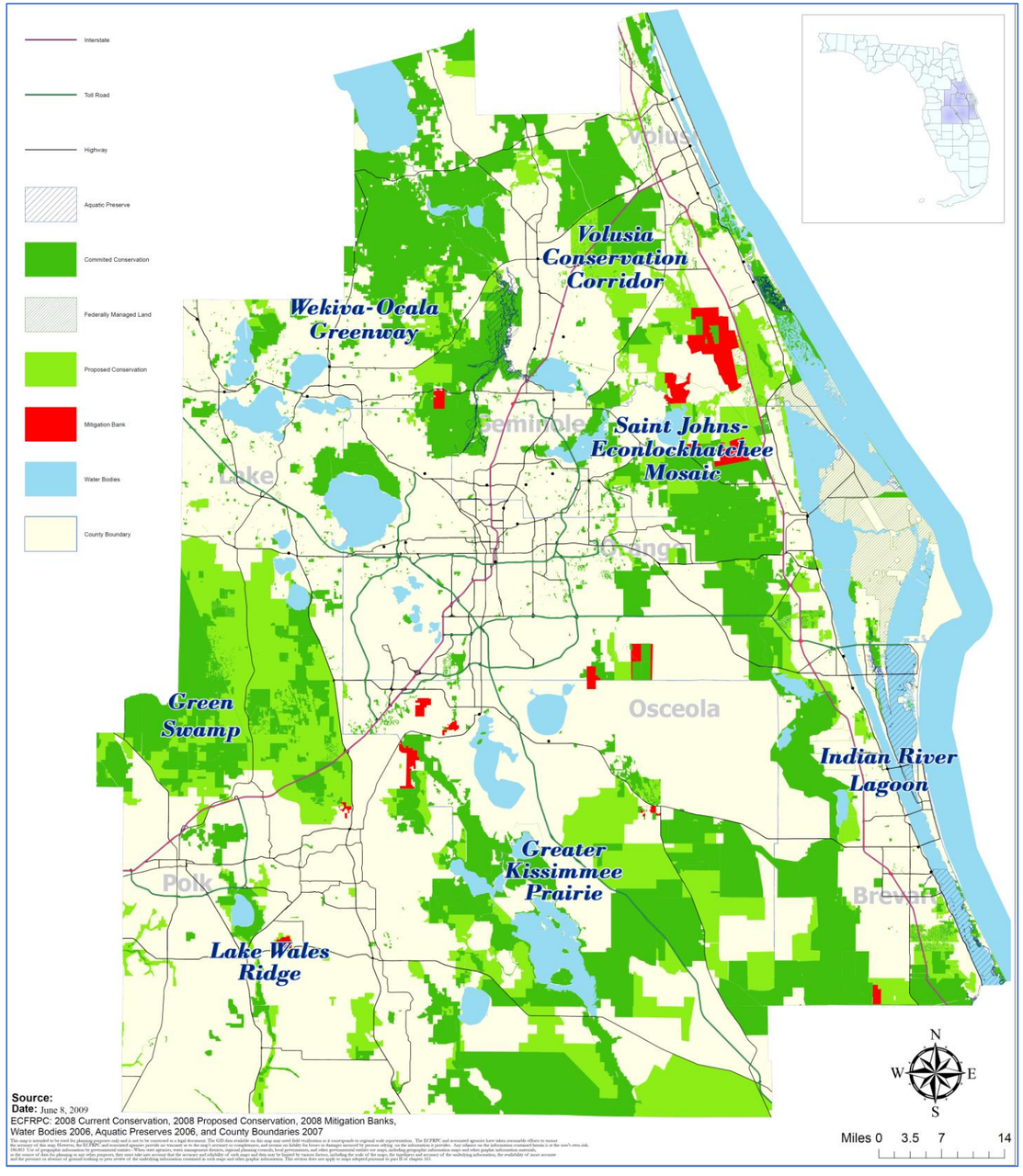
The Natural Environment

East Central Florida is home to several important natural assets including approximately 120-miles of beaches and thousands of acres of specially protected areas such as forests, wetland systems, and springs. In 2004, Natural Central Florida (a partnership between myregion.org and UCF's Metropolitan Center for Regional Studies) identified seven ecosystems of regional significance. Referred to as the seven jewels, these systems represent an interconnected network of natural areas that deserve the utmost level of protection as they offer significant environmental and economic value to East Central Florida. These critical natural areas are described in more detail below (clockwise).

Lake Wales Ridge: This 150-mile sand ridge includes parts of Lake, Orange, and Osceola counties. At 312 feet the ridge's highest point, Sugarloaf Mountain, is also the highest point in peninsular Florida. The area is dominated by scrub habitat but also includes sandy hills, pine flatwoods, and sinkhole lakes. The area is home to approximately 40 species of threatened and endangered plants and animals such as the Florida Scrub Jay, the Gopher Tortoise, and the Sand Skink.

Green Swamp: Encompassing 870 square miles, the Green Swamp contains the state's second largest wetland system after the Everglades. This critical ecosystem includes portions of Lake and Sumter counties. Just underneath the soil's surface is a large raised limestone plateau, which is the top of the Floridan Aquifer. It provides water for a multitude of springs, five major rivers, and countless lakes, ponds, and wetlands. In 1974, nearly 300,000 acres of the Green Swamp were designated as a State Area of Critical Concern, which provides greater development oversight.

Greater Kissimmee Prairie: This natural area is comprised of open stretches of prairie, marshes, oak hammocks, cypress domes, rivers, wetlands, lakes, and pine flatwoods encompassing parts of Orange and Osceola counties. This ecosystem is home to Shingle Creek, a small waterway that is generally considered to be the northernmost headwaters of the Everglades watershed.



The Natural Environment

Indian River Lagoon: One of the most biologically diverse estuarine ecosystems in the nation, the Indian River Lagoon (together with the Banana River and Mosquito Lagoon) is part of a large system of interconnected estuaries that stretch 156 miles along Florida's east central coast. The area is home to more than 4,300 species of plants and animals and is an important part of Volusia and Brevard counties sport fishing industry. This area includes the Archie Carr National Wildlife Refuge, a 20-mile stretch of central east coast barrier island that represents one of the most important sea turtle nesting areas in the world.

St. Johns Mosaic and Econlockhatchee River: This natural system is comprised of the basin lands that surround the St. Johns and Econlockhatchee Rivers in the eastern part of the region. Both rivers have special designations because of their important contributions to the region's history and watersheds. Both rivers have been affected by human actions such as dredging and storm water pollution.

Volusia Conservation Corridor: This corridor that stretches along Volusia and Flagler counties connects more than one million acres of publicly managed and protected lands that span from the Florida Everglades to the Okeefonokee Swamp. It is also an important linkage in Florida's migratory wildlife greenways.

Wekiva-Ocala Greenway: This natural system is comprised of dozens of natural springs, the greatest expanse of sand spine scrub in the world, and the largest black bear population in Florida. Most of this area is currently protected by the Wekiva River Protection Act (1988) and the Wekiva Parkway and Protection Act (2014). Some of the largest natural assets within this natural system are the Wekiva River, Wekiva State Park, and the Ocala National Forest.

Besides serving as habitats for multiple species and providing water to the region, East Central Florida's natural ecosystems also provide economic benefits to the region in the form of recreation and ecotourism opportunities.

Regional Case Study: Indian River Lagoon

"There is an ecological crisis in Indian River Lagoon." - Environmental activist group Audubon Florida

Freshwater discharge from Lake Okeechobee combined with agricultural runoff disposed into the Indian River Lagoon and surrounding water systems has created a catastrophic algae bloom that has killed off much of the ecosystem's plant and animal life. This pattern of pollution has been a growing problem. Water quality data shows that the average level of phosphorous, the fertilizer byproduct that the algae thrives on, rose nearly 75 percent between 2000 and 2016. As a result, in summer 2016, an unusually high amount of algae bloomed, creating an oxygen-deprived estuary, killing off an unprecedented amount of fish. The "Fish kill" created a devastating stench, which combined with the toxic nature of the water, has had severe economic impacts through real estate and recreation.

Experts say the problem starts with increased freshwater runoff into the Okeechobee system, which inundates the Indian River Lagoon with nutrient-rich freshwater. Increased runoff is attributed to the more than 500,000 homes built since 2000 in the area surrounding the Indian River and Kissimmee River watershed which drains into the Okeechobee system, then Indian River. The decreased pervious surfaces make the Kissimmee River unload into the Okeechobee much faster than the system can naturally withstand.

Natural Resources and Regional Resiliency

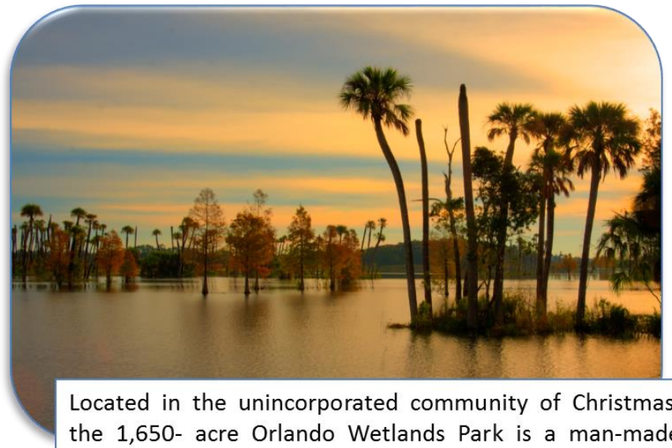
The conservation of East Central Florida' natural habitats is vital for maintaining the region's quality of life. However, the integrity of these environmental resources is under siege because of a variety of factors including urban sprawl, over ground water extraction, water body pollution, and sea level rise.

According to the Strategic Regional Policy Plan, East Central Florida has lost more than 394 square miles of habitat since then end of World War II. Most of this land was urbanized to give way to new housing and commercial developments needed to support a growing population. Based on the REMI forecast, the region is expected to have ___ new residents in 2040. Local jurisdictions will need to identify creative ways to be able to house this new population by increasing densities and intensities, and redeveloping old corridors.

One of the resources most affected by the region's high population growth is the Floridan Aquifer system, which is the region's main water supply. Freshwater withdrawals are currently exceeding the aquifers recharge capacity, which has started to affect the quality of Florida's springs. In the future, more water will need to come from alternative sources such as the treatment of surface waters or high tech desalination plants. Another challenge is the high number of Florida homes that depend on septic tanks to treat their sewage. This has contributed to the impairment of several of the region's water bodies including the Indian River Lagoon.

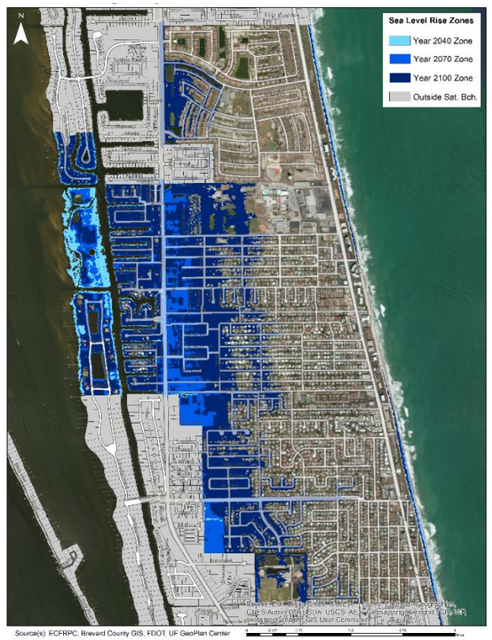
Finally, warmer global temperatures are expected to have a huge impact on East Central Florida's economy and environment. Sea levels are estimated to rise at least one meter by 2100, which would require the relocation and adaptation in Florida's coastal communities. The ECFRPC has been a leader in this area. Staff have been assisting coastal communities with assessing their vulnerability to sea level rise, storm surge, floods, and coastal erosion.

Regional Best Practices: Orlando Wetlands Park



Located in the unincorporated community of Christmas, the 1,650- acre Orlando Wetlands Park is a man-made wetland designed to treat reclaimed water from the City of Orlando and other urban communities.

Areas Affected by Sea Level Rise in Satellite Beach



Source: ECFRPC

Infrastructure

The East Central Florida region possesses several important infrastructure assets that have helped it thrive during the past decades. It is often mentioned that East Central Florida is the only place where you could travel by air, land, water, and space. The following section describes some of these transportation assets in more detail.

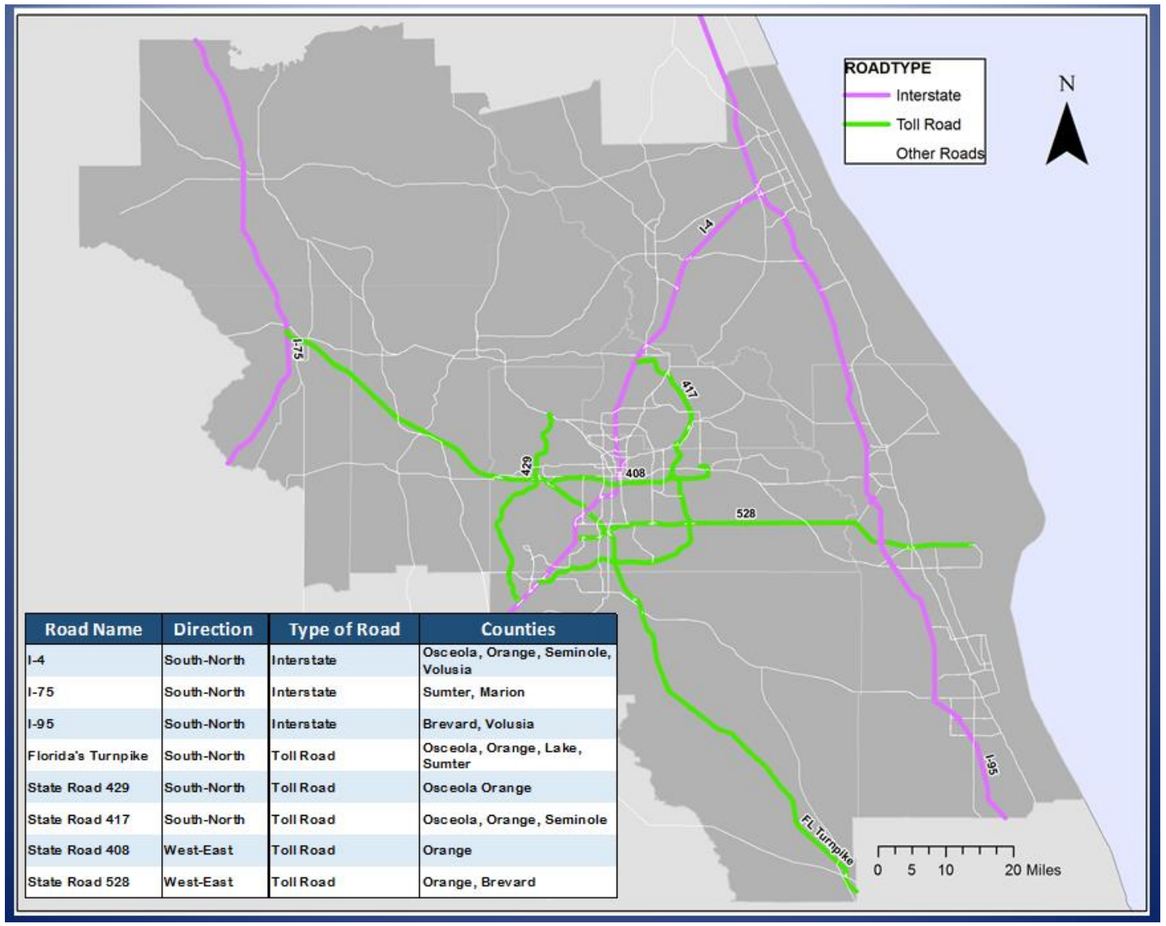
Road Network

East Central Florida's major road network is comprised of approximately 76 highways and major arterials, three interstates (I-4, I-75 and I-95), and five toll roads (Florida's Turnpike, S.R 408, S.R. 417, S.R.429 and S.R 528). This road network helps to efficiently move goods and services and commuters across the region. However, East Central Florida's roads are heavily congested, a condition that is exacerbated by the region's sprawling development patterns.

Currently, there are two main projects under construction that could help alleviate some of the areas' congestions: Interstate 4 highway currently going through a 21-mile overhaul from west of Kirkman Road in Orange County to east of State Road 434 in Seminole County and the Florida Department of Transportation (FDOT) is in the process of completing the beltway around northwest metropolitan Orlando. Known as the Wekiva Parkway, this 25-mile tolled expressway will provide a new travel alternative for those commuters traveling between Lake, Orange, and Seminole counties. To minimize the road impact's to the Wekiva River Basin and reduce accidents between vehicles and wildlife, the toll road will be largely elevated throughout its route. Moreover, more than 3,400 acres of land was set apart for conservation purposes.

While state and regional transportation agencies have continued to invest millions of dollars to add road capacity, building new roads in East Central Florida would be very difficult because of environmental constraints (lakes, wetlands, and sensitive ecosystems) and lack of new funding alternatives. Because of these reasons, regional transportation leaders have continued to invest in public transportation options.

East Central Florida's Major road Network



Road Name	Direction	Type of Road	Counties
I-4	South-North	Interstate	Osceola, Orange, Seminole, Volusia
I-75	South-North	Interstate	Sumter, Marion
I-95	South-North	Interstate	Brevard, Volusia
Florida's Turnpike	South-North	Toll Road	Osceola, Orange, Lake, Sumter
State Road 429	South-North	Toll Road	Osceola Orange
State Road 417	South-North	Toll Road	Osceola, Orange, Seminole
State Road 408	West-East	Toll Road	Orange
State Road 528	West-East	Toll Road	Orange, Brevard

Commuter Rail

Central Florida's commuter rail, SunRail, is a 31-mile corridor currently connecting Orange, Seminole, and Volusia counties. Opening in 2014, the project's first phase includes six stations starting south at Sand Lake Road in Orange County and terminating north at DeBary in Volusia County. In 2011, a 24-member consortium led by the ECFRPC was awarded a $2.4 million HUD Sustainable Communities Grant to plan for sustainable transit-oriented developments around the original SunRail stations. Most of this money was passed to local governments to assist with these planning efforts.

Today SunRail averages close to 3,500 riders per day, which is well below the original estimate. Part of the problem strives from the system's limited operation schedule, which makes trains available only on weekdays during commuting times. Gas prices have also remained very low during this time period which makes driving more enticing. Finally, several jurisdictions have struggled with how to transport SunRail users from the stations to their final destination (the last mile connection). Some of them are subsidizing Uber rides to and from the station. The opening of SunRail's second phase, which will connect the system to Osceola County, should also increase the number of commuters.

Buses

East Central Florida is served by several fixed-route transit bus systems. The largest one is Lynx which serves Orange, Osceola and Seminole counties and small portions of Lake and Polk counties. Lynx buses transport approximately 85,500 people per day along a 2,500 square mile area. The company also operates LYMMO, Orlando's downtown circulator. Other fixed-bus transit systems within the region are LakeXpress (Lake County), Space Coast Area Transit (Brevard), Sumter County Transit, and VOTRAN (Volusia County). The effectiveness of East Central Florida's bus transit systems is currently hindered by two factors. One is the lack of a dedicated funding source (particularly in the case of Lynx) and two, the region's low densities discourage the development of Bus Rapid Transit (BRT) routes that could help to improve capacity and increase reliability.

SunRail Route

Airports

East Central Florida is home to four international airports- Daytona Beach, Orlando International Airport, Orlando-Sanford, and Orlando Melbourne- that provide connections to multiple locations around the world. OIA is the biggest airport facility on the region transporting an average of 118,000 passengers per day. OIA is currently in the midst of building a new South Terminal to increase the airport's capacity. The region also has 14 municipal airports that provide a variety of aviation support services such as flight instruction, cargo transportation, and other related uses.

Port

Port Canaveral is the largest port facility within the region. It is one of world's largest cruise ports, carrying 4.2 million passengers in 2016. The port area is home to numerous recreational facilities including the Exploration Tower and Cove harbor-side dining and retail areas and several public parks. Several investments have been made to increase the facility's cargo carrying capacity which reached 5.5 million tonnage in 2016. The Port Authority recently opened a new logistics center in Titusville.

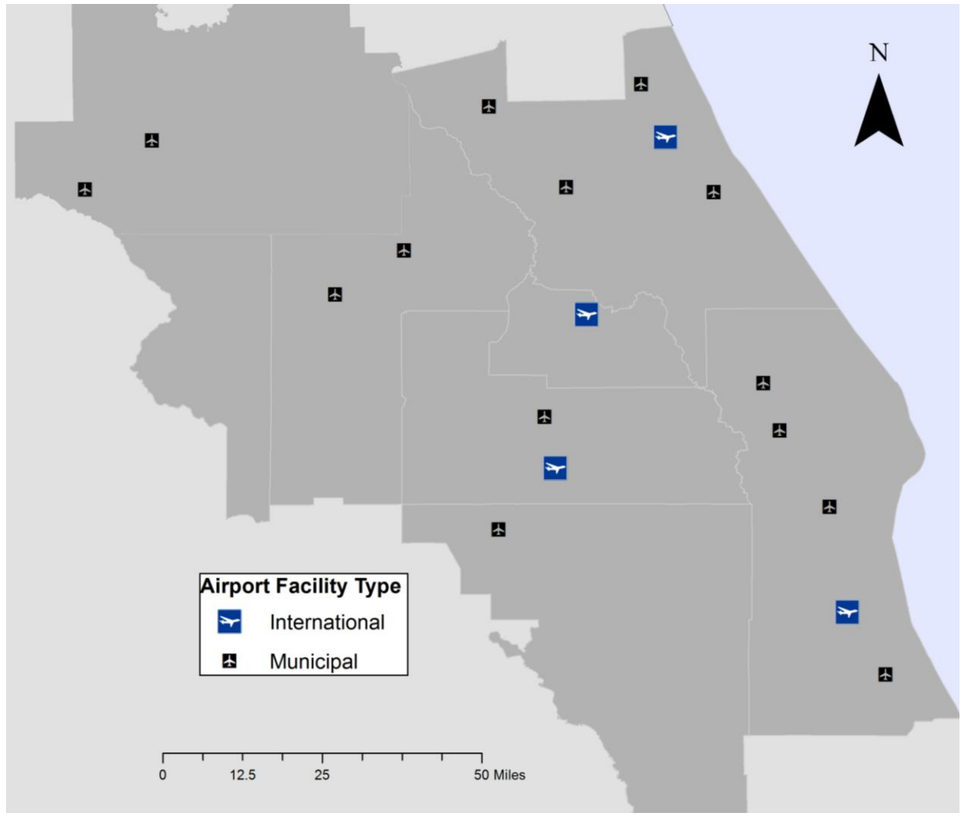
Rail Service

Amtrak operates four long distance routes across the state that pass through East Central Florida. These train lines are the Auto Train (Washington DC-Sanford), the Silver Meteor (New York-Orlando-Tampa-Miami), and the Silver Star (New York-Orlando-Miami). In the near future the region is expected to be served by the Brightline, a high speed intercity express train service connecting Miami and Orlando. This new rail service is expected to service over 50 million passengers. East Central Florida also has a freight rail network comprised of Class I (CSX), Class II (FEC) and Class III (Florida Central) railroads. CSX has major railyard and distribution operations in Orlando and Sanford.

Space Port

Regional leaders are working to position Kennedy Space Center (KSC) as the premiere destination for passenger and cargo deliveries to space. Space Florida's Vision 2020 plan identifies ten markets that could potentially benefit from KSC's infrastructure facilities. Moreover, private space companies like Blue Origin and SpaceX have opened operations at KSC.

East Central Florida's Public Aviation Facilities



Sources: Infogroup, ECFRPC research

Private Space Companies in East Central Florida

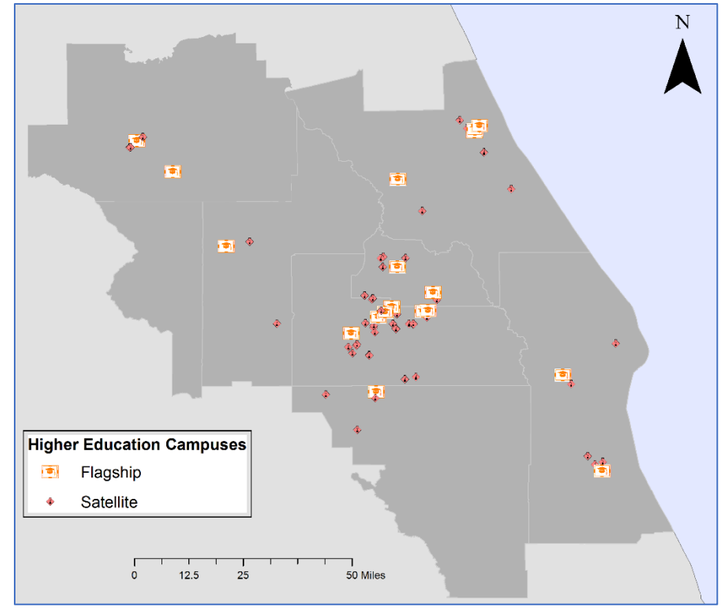
Higher Education Infrastructure

East Central Florida has an abundance of higher education institutions that provide residents with the opportunities to earn a variety of professional certifications, associates, bachelors and graduate degrees. ECFRPC staff identified over 60 public and private universities with campuses located across the region. The largest of these is the University of Central Florida (UCF), which is also the second largest university in the nation. Located in east Orange County, UCF is currently building a new location in downtown Orlando in partnership with Valencia College. Other large flagship institutions include the Florida Institute of Technology in Brevard County, Full Sail University, and Rollins College in Orange County, and Bethune-Cookman, Stetson University and Embry-Riddle Aeronautical University in Volusia County. All these universities offer academic programs that are nationally ranked among the best in the nation. Several national private universities also have satellite campuses across the region.

The region's college system (College of Central Florida, Daytona State, Eastern Florida State, Lake-Sumter State, Seminole State, and Valencia College) is another important educational asset. Most students start their education at one of these institutions and then transfer to a larger university. However, since 2009 most of Florida's colleges also offer four-year bachelor's degrees. East Central Florida's colleges have multiple campuses located across the region, which helps them reach more traditional and non-traditional students. They also are recognized for providing a quality education at an affordable price. For example, in 2011 Valencia College received the inaugural Aspen Prize for Community College Excellence.

One the region's hidden educational assets are its vocational technical schools. These institutions offer relatively short, career-focused programs that quickly prepare graduates for the workforce. These institutions are key to preparing highly sought "middle skill" workers needed by fields such as manufacturing/fabrication and the construction trades. In East Central Florida, Orange County Public Schools runs the largest vocational program in the region with five locations.

Higher Education Institutions



Sources: Infogroup, ECFRPC research

Regional Best Practices: Creative Village

Creative Village is a public/private partnership in which the University of Central Florida, Valencia College are working with developers and city officials to construct a downtown Orlando educational campus. The project, which broke ground in May 2017, will build upon the region's digital media and hospitality industries. Located on the vacant site of the old Amway Arena, the campus is slated to open Fall 2019 with an anticipated 7,700 students. The educational complex will offer up to 1,000,000 square feet of office/education space, with a final estimated investment value of $1 billion. The project features ambitions for mixed-use development and transit-oriented design.

Places

Planners, economic developers and other professionals often use the phrase "live, work and play" to describe the attributes of the perfect community. However, in reality these environments rarely coexist within the same location. Most Americans commute to downtown jobs from far flung suburbs and choose to entertain themselves outside of these two locations. These strict separation of uses do not provide a clear path to community resiliency. This is important as geography has been continuously proven to have important effects over everything from community health to economic mobility. To achieve resiliency, community leaders need to learn how to harness the region's built environment to attract new investment and increase overall quality of life. This section of the CEDS provides an overview of East Central Florida's communities and places of work.

Live

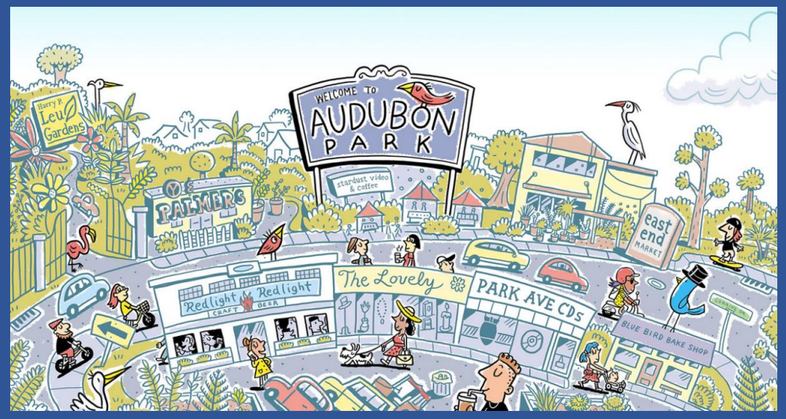
Because of its high migration levels and abundance of low paying jobs, East Central Florida continuously struggles with housing affordability. Most of the region's residents spend over 30% of their income on housing costs, especially when transportation costs are taken into account. Based on information from the Center for Neighborhood Technology's H+T Index, all of East Central Florida's metro areas are considered to be cost burdened with residents spending between 52 and 65 percent of their income on housing and transportation costs. This situation is attributable to a variety of factors. This includes neighborhood's low access to jobs and transit and the very low density development patterns predominant within the region and discourage walkability.

Community design has a deep impact on the health, security and general well-being of residents. An example of this is walkability. According to Smart Growth America's Dangerous by Design Study, Palm Bay (2), Orlando (3), and Deltona (5) are ranked among the five worst metro areas for pedestrians in the nation. These rankings reflect both the number of people who walk to work and the number of pedestrian fatalities. These are important issues that need to be addressed to improve the quality of life in our region.

MSA/County	Costs as Percent of Income		
	Housing	Transportation	Total
Deltona	36%	29%	65%
Orlando	35%	26%	61%
Palm Bay	33%	26%	59%
Sumter	29%	24%	52%

Source: Center for Neighborhood Technology H+T Index

Regional Best Practices: Corrine Drive Complete Streets Study



Located in Orlando's East End, the Audubon Park Garden District is home to a number of specialty shops and eateries. The area first grew after WWII as a commercial destination dominated by strip malls and heavy traffic. Recently, efforts to revitalize the community to have a strong sense of place have attracted national recognition. In 2016, The National Main Street Center honored Audubon Park with a Great American Main Street Award, an honor that recognizes the country's best example of commercial district revitalization. Buildings on this place making success, MetroPlan Orlando, in partnership with the City of Orlando, Orange County, and the City of Winter Park. has launched a Complete Streets Study on the Corrine Drive corridor. This study will explore opportunities to transition this corridor from an arterial thoroughfare into a Complete Street designed for people, pedestrians, and bicycles, not just cars.

Work

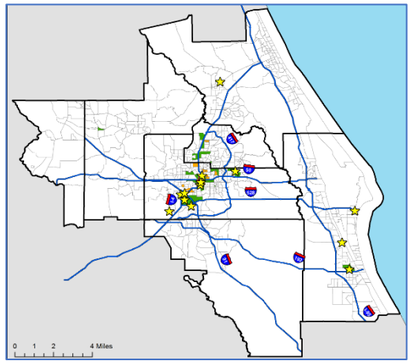
Despite the economic and demographic primacy of Orange County and the City of Orlando, East Central Florida needs to be considered as a polycentric region. That is our region is organized around multiple political, social and financial centers. In the case of jobs, they are dispersed all throughout East Central Florida. To identify regional employment centers, ECFRPC staff used data from the Census Transportation Planning Product's (CTTP) Census Tract Flows. The "Daytime Population" represents the total number of workers who either stayed in the same geography or whose destination is in that geography.

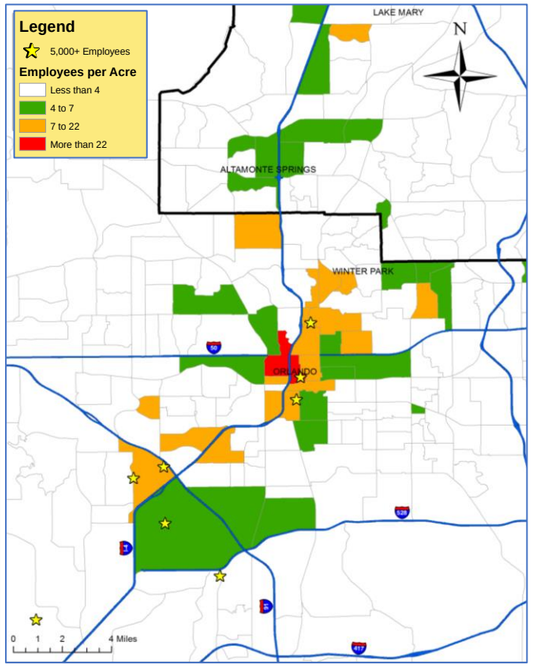
Based on absolute numbers the Census Tracts (CT) with most employees can be found in Downtown Orlando (59,044), the Disney Theme Parks area (43,974), the International Drive Corridor (37,469), Orlando International Airport (22,866), and the Melbourne International Airport (21,505). These areas are home to some of the region's largest employers.

Since the CTs size varies according to their total population, the ECFRPC decided to equalize them by calculating the total number of jobs per acre. Using this method, the ECFRPC confirmed that the largest regional employment centers are located along the I-4 corridor. CT 189 (54 employees/acre) and CT 102 (22 employees/acre) have the highest employment densities within the region. Both of them are part of the Downtown Orlando Business Development District. It is then followed by three CTs that comprise Orlando's hospital corridor along Orange Avenue. These neighborhoods are home to Orlando Health (CT 185) and Florida Hospital (128 and 188). Based on this methodology, other dense employment clusters are the Winter Park CBD and Maitland Center (12 employees/acre). Finally, the 33rd Industrial Park. Universal Theme Parks, and the Orlando Fashion Square Mall area have over 10 employee/acre.

These employment corridors provide an important economic value to the East Central Florida region. For these employment centers to continue to thrive, it is important that planners take special consideration when assessing land use changes and evaluate future infrastructure improvements.

East Central Florida's Employment Density





East Central Florida Largest Employers		
Establishment Name	Type	Employment
Walt Disney World Resorts	Leisure & Hospitalty	74,000
Universal Studios	Leisure & Hospitalty	20,000
Florida Hospital Orlando	Health	19,304
Orlando Health	Health	15,174
Lockheed Martin	Avionics	7,000
Orange County	Government	6,768
Harris Corporation	Antennas	6,700
University of Central Florida	Education	6,564
Health First	Health	6,420
Westgate Resorts	Leisure & Hospitalty	6,156
United Space Alliance	Avionics	5,890
Darden	Corporate Headquarters	5,211

Sources: My Sidewalk, Infogroup, OBJ Book of Lists

Best Practices: I-Drive Economic Impact Analysis

Home to the Orange County Convention Center and six of the world's most visited theme parks, the International Drive Resort Area is one of the region' most important economic hubs. In 2016 the ECFRPC completed the I-Drive Economic Impact Analysis, the first study that attempts to estimate the economic value of a place in Metro Orlando. Among many things, staff developed a methodology to calculate the number of visitors coming to I-Drive annually and their total spending. This information was then entered into the REMI PI+ model to calculate the impact of the resort area on both Orange County and the Metro Orlando economies. Among many things, the study found that I-Drive visitor spending accounts for 11% of all Orange County jobs.

Play

Being home to several of the world's most visited theme parks and countless miles of beaches and natural amenities, the East Central Florida region contains many exciting destinations where residents and visitors can enjoy their leisure time. The region's municipalities have done a very good job preserving their downtown areas using the Community Redevelopment Areas (CRAs). The purpose of the CRA program is to help communities address the presence of substandard or inadequate structures, a shortage of affordable housing, and inadequate infrastructure. According to the Florida Legislature's Office of Program Policy Analysis and Government Accountability, the region has over 60 CRAs. All redevelopment activities within these targeted districts are funded using revenues generated through tax increment financing. This tool allows CRAs to use revenues from real property value increases to fund infrastructure projects and provide grants to local businesses.

Another revitalization tool is the Main Street Program, which targets traditional neighborhood commercial districts across the City of Orlando. All ten of the City's Main Street Districts receive annual financial support, technical assistance and intensive training. In turn, each district is responsible for hiring a full time Executive Director and raise matching funds to implement its programs according to an annual work plan. Several success stories have come from the Orlando Main Street's Program including the designation of the Audubon Park Garden District as 2016's Great American Main Street, a national honor.

The success of the region's CRAs and Main Street Districts is predicated upon two things. These areas need to complete a neighborhood plan that details the capital improvements to be funded and annual programs and activities that need to be completed. While good leadership is important, strong community support is even more pivotal. All these districts rely on the work of volunteers to complete most of their activities making them a good vehicle for community engagement.

Regional Best Practices Downtown Sanford Redevelopment

Historic Sanford rests on the waterfront of Lake Monroe, a mouth to the St. Johns River. Sanford's Community Redevelopment Agency began upgrading their 1st Street streetscape project in 2004, which was the commencement of their modern redevelopment. In 2007, The Community Redevelopment Agency identified 4.3 miles of "blighted land" within the Lake Monroe Waterfront and Downtown Sanford area. Outlined within the City of Sanford's Redevelopment Master Plan, last amended 2009, the CRA was to pursue redevelopment and revitalization of Downtown and establish it as a regional center, improve neighborhood conditions and social equality, and integrate function and transportation to the Downtown-Waterfront area. The CRA also stimulates growth by financing promotions and events, such as "Alive After Five", a monthly downtown street festival.

Post Cards from East Central Florida's Downtowns

DeLand

Mount Dora

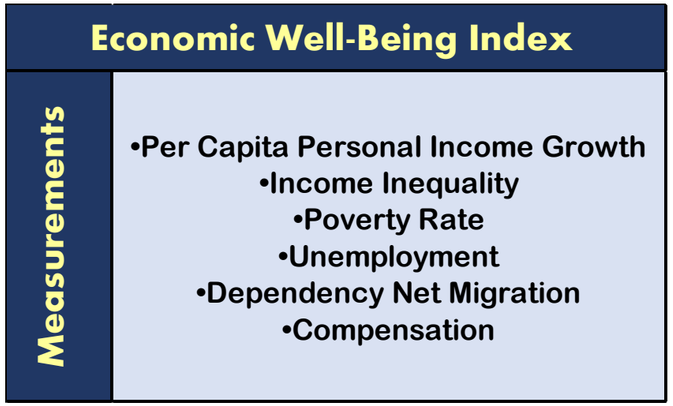
Winter Garden

Measuring Prosperity in East Central Florida

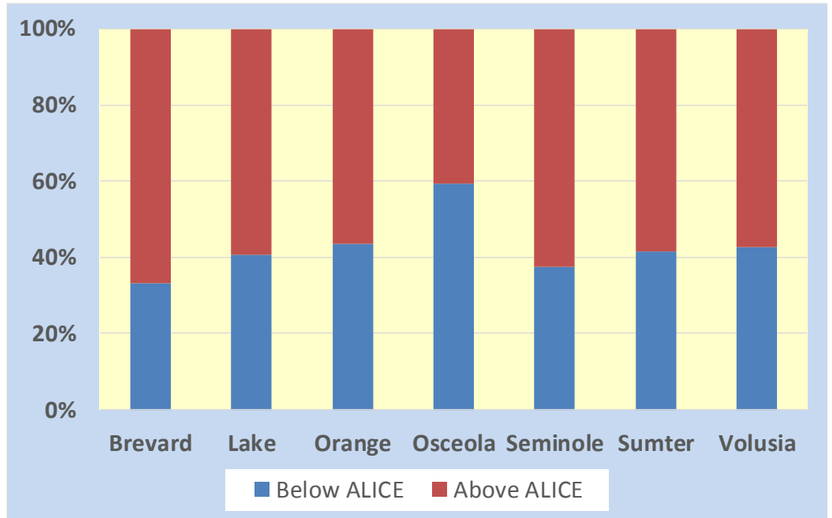
The main goal of economic growth is to increase overall regional prosperity and wealth. This is achieved by raising the standard of living for the community's residents. Stats America measures prosperity using the Economic Well-Being Index, which is comprised of the following measurements:

- **Per Capita Personal Income Growth:** Calculated by the average annual rate of change (2002-present) based on the individual's place of residence
- **Compensation:** Includes both the growth of Annual Wage and Salary Earnings per Worker and the Change in Proprietor's Income per Proprietor from 2002 to the latest year available.
- **Income Inequality*:*** This measurement is used to represent a region's skewed income
- **Average Poverty Rate:** Reflects the region's population living below poverty
- **Average Unemployment Rate:** The three year average of unemployment
- **Dependence Ratio – Measured by Income Sources**: Reflects the degree in which a region relies Social Security, disability, and other welfare payments.
- **Average Net Migration**: Indicates the appeal of the region or county of interest.

East Central Florida is ranked in the bottom 20% in this index. This is most heavily driven by factors related to income growth, which is among the worst in the nation (380 out of 384). This low level of labor compensations has detrimental consequences for our region. United Way's ALICE report found that 42% of East Central Florida's residents are unable to adequately support themselves before accounting any sort of savings. The ALICE acronym stands for the households in our community that are asset limited, income constrained, but employed. Despite being fully employed, this population struggles to afford basic household necessities such as childcare and transportation. The report breaks down living costs by county, and compares them against household earnings and demographic information.



Percentage Households below ALICE Standards by County



Source: United Way of Florida's ALICE Report

Based on the results of this assets inventory, the East Central Florida region is home to seven unique natural jewels that are currently under threat because of urban sprawl, over ground water extraction, water body pollution, and sea level rise. The high number of residents expected to move into the region within the next 25 years would put even more pressure on these precious systems. The region's leaders would have to identify creative ways to house these new residents without affecting these ecosystems. On a positive note, there are currently efforts underway to restore important natural areas such as the Indian River Lagoon.

One of the region's biggest assets is its infrastructure. East Central Florida is one of the few places in the nation where people can choose to travel by car, train, boat, airplane and space ship. However, congestion is certainly a problem in most of the East Central Florida's major transportation corridors. Moreover, despite the progress made during the past few years, its public transportation system is still inadequate for a burgeoning region. East Central Florida does possess a solid higher education system comprised of over 60 institutions. This diversity of institutions has helped to improve the region's education attainment.

East Central Florida is a very young region that grew based on the advent of the space age and Walt Disney World. This situation has led to the creation of sprawling communities that are dangerous for pedestrians and relatively expensive to live. Job sprawl is a common feature in East Central Florida, with the densest employment centers located along I-4. Local governments within the region should pay attention to these corridors and identify opportunities to better connect these employment centers. Moreover, there are currently several efforts underway throughout the region to activate and revitalize downtown core areas and traditional commercial corridors.

While East Central Florida has continued to grow exponentially, economic prosperity has not reached everyone. Both the Stats America Economic Well-Being Index and United Way's ALICE report confirm that a good portion of East Central Florida's population is not receiving the benefits of economic growth. This is partly due to a misunderstanding of what makes East Central Florida a competitive region. Business leaders and policy makers need to focus their efforts on developing strategies to increase the region's quality of life and make it a more resilient place.

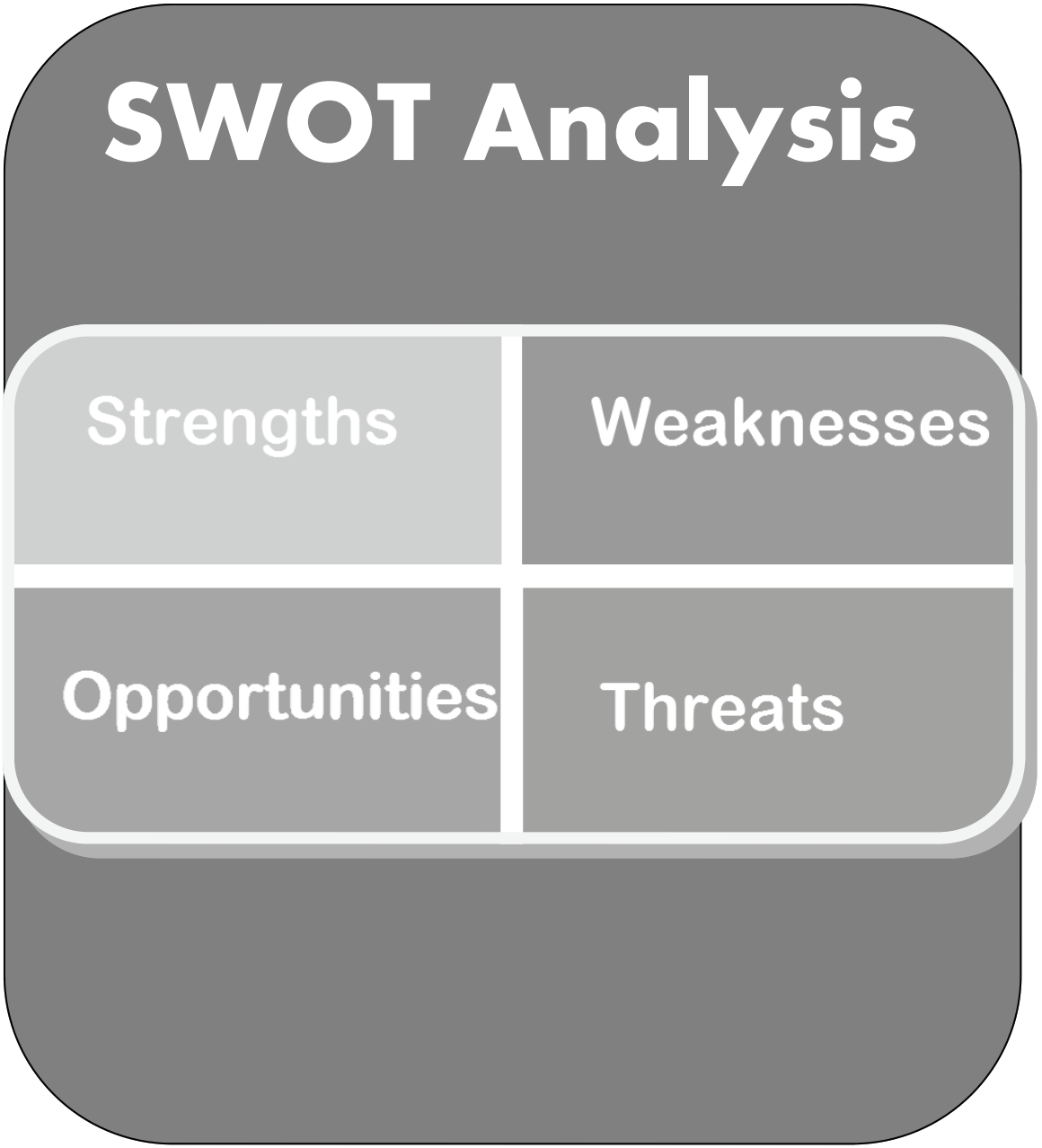
Place Trends Analysis Major Highlights

***S**trengths:*

- Unique Environmental Features
- Strong Infrastructure Investment
- Urban Revitalizations Efforts

***W**eaknesses:*

- Urban Sprawl
- Inadequate Public Transportation
- Low Levels of Economic Prosperity


SWOT Analysis
Strengths
Weaknesses
Opportunities
Threats

Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

The CEDS Strategy Committee used its June and August meetings to participate in a Regional SWOT Analysis. During the first meeting, the Strategy Committee members worked individually to list their county's best assets, how their organizations benefit the county where they are located, the biggest challenges faced by their respective counties, and the biggest challenges faced by their organization.

EDD staff compiled these individual responses and organized them according to the CEDS PEP framework (People, Economy, Places). At the August meeting, staff presented the responses to the group together with some of the major findings from the CEDS report. Strategy Committee members were then asked to rank East Central Florida's challenges in order of importance. The three highest challenges per pillar are presented here.

Under the People Pillar, Strategy Committee members thought that the lack of talented/skilled workforce was the biggest challenge. This was followed by the growing gap in hard/soft skills and the predominance of low wage positions. The region's low prosperity level was ranked as the biggest Economy challenge followed by its high level of poverty and inequality and the lack of venture capital to help start businesses. Finally, the lack of land and buildings to site new businesses, high housing/transportation costs, and aging infrastructure were the biggest Place challenges.

Through the next three years, EDD staff will work with CEDS Strategy Committee members and other partners to develop initiative and programs that could help address these challenges.

CEDS Strategy Committee SWOT Exercises

East Central Florida's Biggest Challenges

People	Economy	Place
Lack of Talent/Skills	Low Prosperity Levels	Lack of Land and Buildings
Growing Hard/Soft Skills Gap	Poverty and Inequality	High Housing and Transportation Costs
Predominance of Low Paying Jobs	Venture Capital and Financing	Unavailable and Aging Infrastructure

Goals
and
Strategies

2017 CEDS VISION

STATE OF FLORIDA

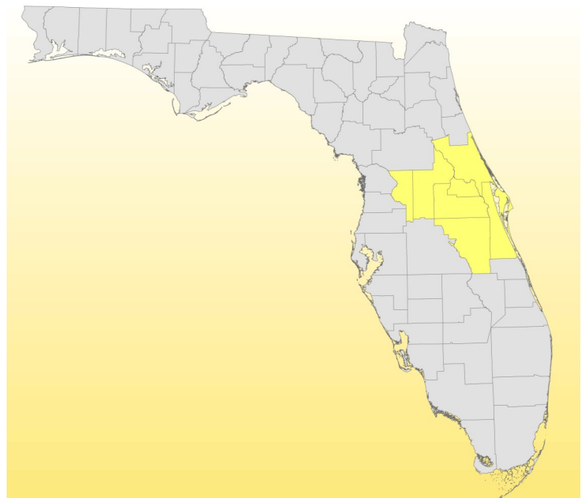
Florida will have the nation's top performing economy and be recognized as the world's best place to live, learn, play, work, and do business.

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



2017 CEDS GOALS AND STRATEGIES

PEOPLE
Goal PE1: Support educational partnerships and activities that encourage learning opportunities for East Central Florida residents Objective PE1-1 Educate children about career opportunities at early ages Objective PE1-2 Encourage out-of-school enrichment activities such as high tech and business camps for youth Objective PE1-3: Promote libraries as community places of access for new and continuing education for adults
Goal PE2: Promote programs and activities that prepare our workforce for lifelong learning and ever-changing careers Objective PE2-1: Support programs that teach employability, critical thinking, and soft skills to workers Objective PE2-2: Promote the development of Massive and Open Online Courses (MOOCS) and other distance learning opportunities Objective PE2-3: Work with regional education tech centers to develop a higher number of short-term training and certificate programs
Goal PE3: Increase the educational attainment of the East Central Florida workforce Objective PE3-1: Emphasize the importance of higher education and advanced degrees Objective PE3-2: Increase the number of middle-skilled workers
Goal PE4: Attract and retain young talented workers Objective PE4-1: Strengthen the existing business base and ensure the success of new companies Objective PE4-2: Support facilities and programs for business startups and collaborations such as co-working spaces and technology and business incubators Objective PE4-3: Nurture programs and organizations that promote community engagement and civic pride in our communities

2017 CEDS GOALS AND STRATEGIES

ECONOMY

Goal E1: Support efforts to increase East Central Florida's global competitiveness

Objective E1-1: Measure the strength of county and regional clusters and industries

Objective E1-2: Identify significant employment concentrations and corridors

Objective E1-3: Identify research and innovation levels based on patents and other programs

Objective E1-4: Support partnerships between local businesses and universities to address industry issues

Objective E1-5: Measure region's intellectual capital for regional and county industries

Objective E1-6: Monitor the number of technology jobs and businesses within the region

Goal E2: Identify factors that affect the region's competitiveness

Objective E2-1: Assist private businesses and organizations with their industry needs

Objective E2-2: Identify possible land use barriers that might affect business development

Objective E2-3: Support the effort of the East Central Florida Trade Office

Objective E2-4: Identify opportunities for export of goods and services

Goal E3: Increase the region's role in global trade

Objective E3-1: Raise awareness in local communities about the need to adopt both regional and international approaches to doing business

Objective E3-2: Increase the number of goods produced in the region and augment the volume of exports

Objective E3-3: Increase foreign investment and multinational businesses to strengthen international ties

Objective E3-4: Ensure the region, including the inland counties, is represented in trade and logistics discussions

Objective E3-5: Maintain status as one of the world's largest leisure travel and convention destinations

Objective E3-6: Leverage the region's position as a top leisure destination to create more business opportunities

Objective E3-7: Promote the conservation of vacant industrial land for manufacturing, warehousing, and other industries

Objective E3-8: Encourage local universities to create degree programs addressing international trade and supply chain/logistics

Objective E3-9: Assist local jurisdictions with certifying properties for site selection purposes

Objective E3-10: Promote the freight village concept as a way to optimize the transportation and distribution of goods across the region

2017 CEDS GOALS AND STRATEGIES

ECONOMY

Goal E4: Expand the manufacturing base of East Central Florida

Objective E4-1: Maintain the vibrancy of the legacy industries while using their technologies to spin off new businesses

Objective E4-2: Study the local supply chain of goods and services to ensure it meets manufacturers' needs

Objective E4-3: Support efforts of the region's economic development organizations to attract targeted industries

Objective E4-4: Identify and strengthen current industry agglomerations and clusters

Objective E4-5: Support the development of green jobs and industries

Objective E4-6: Collaborate with the Florida High Tech Corridor Council and other partners to grow advanced manufacturing

Objective E4-7: Support strategies that facilitate the location of food processing facilities

Objective E4-8: Maintain our competitiveness in the space travel industry

Objective E4-9: Focus on attracting value added industries

Goal E5: Support technology commercialization and entrepreneurship initiatives

Objective E5-1: Expand access to capital for entrepreneurs and small businesses through micro-lending

Objective E5-2: Promote the role of philanthropic organizations and angel investors to help with the attraction of capital for new businesses

Objective E5-3: Increase awareness of technology commercialization efforts

Objective E5-4: Measure the progress and impact of current business assistance programs

Objective E5-5: Promote the development of technology incubators, business accelerators, and maker spaces throughout the region

2017 CEDS GOALS AND STRATEGIES

PLACES

Goal PL1: Identify how SunRail station areas can become more attractive locations for new businesses and communities

Objective PL1-1: Link the stations to adjacent communities and workplaces through multimodal transportation options

Objective PL1-2: Continue to promote the development of Transit-Oriented Developments around the stations

Goal PL2: Assist with redevelopment and place-making efforts

Objective PL2-1: Promote the creation of neighborhood matching grant programs to improve community aesthetics

Objective PL2-2: Use overlay districts and other planning mechanisms to redevelop older commercial corridors

Objective PL2-3: Collaborate with the Main Street Program and Community Redevelopment Areas

Objective PL2-4: Explore the viability of establishing a regional Brownfields Area-Wide Planning program

Goal PL3: Promote smart growth principles and the development of community amenities

Objective PL3-1: Promote the creation of compact, mixed-use, energy efficient and walkable communities

Objective PL3-2: Continue strong support of bike trails and the development of a state trail network

Objective PL3-3: Support the proliferation of local art and cultural institutions

Objective PL3-4: Encourage businesses to support employee participation in local community organizations

Goal PL4: Protect the region's natural assets through best practices

Objective PL4-1: Encourage the development of ecotourism and heritage tourism

Objective PL4-2: Support the work of the Wekiva Commission to protect the region's springs

Objective PL4-3: Support efforts to revitalize the Indian River Lagoon

Objective PL4-4 Recognize the economic value of wetlands and natural resources

2017 CEDS GOALS AND STRATEGIES

PLACES
Goal PL5: Support CEDS Partners in their projects ad activities
Objective PL5-1: Collaborate with efforts to increase civic health in East Central Florida
Objective PL5-2: Engage newcomers in local processes
Objective PL5-3: Foster participation among young populations
Objective PL5-4: Support collaboration projects
Objective PL5-5: Develop new partnership to foster economic development
Goal PL6: Support Florida's non-profit sector
Objective PL6-1: Help with research information

PLANNING
IMPLEMENTATION
CEDS IMPLEMENTATION PLAN

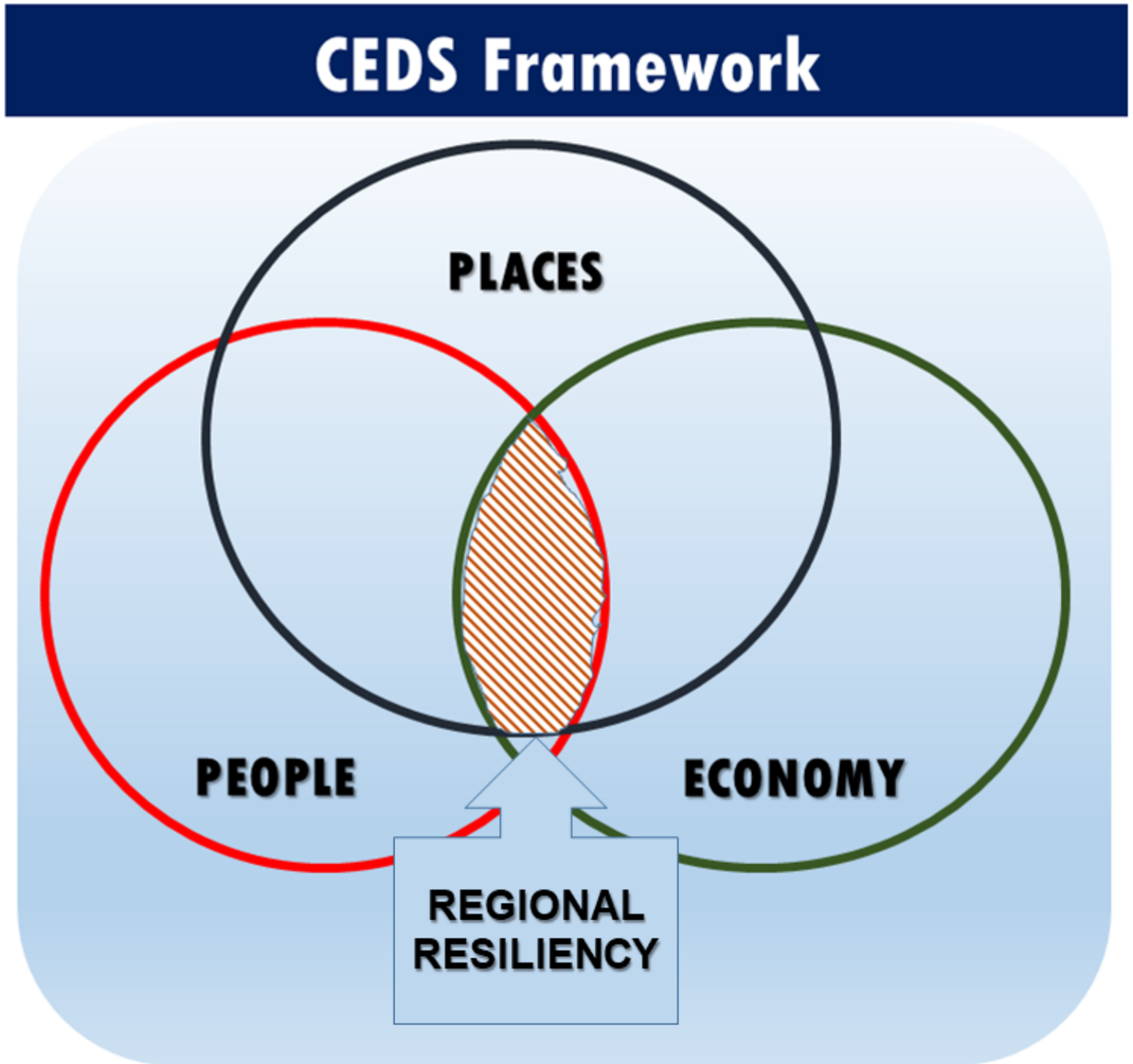
CEDS IMPLEMENTATION PLAN

The East Central Florida CEDS document seeks to help the region become more resilient to economic shocks and natural disasters. This resiliency will be achieved when leaders maximize the development of the region's people, economic, and place-based assets. When compared against other EDD's, East Central Florida ranked within the best in the nation for Business Dynamics, Business Profile, and Human Capital and Knowledge indexes. The region offers great opportunities for job seekers, budding entrepreneurs, and investors. It is among the middle of the pack when it comes to Employee Productivity and Innovation indexes. Finally, the region ranked among the bottom in the nation in the prosperity and well-being measures. This last measure concurs with several of the issues identified by CEDS Strategy Committee member in the SWOT analysis.

When designing the CEDS five-year implementation program, the ECFRPC sought paths to address these regional challenges while also taking into account EDA's priorities, the role of the ECFRPC as a technical assistance provider, and EDD staff's expertise. Based on these different needs, the EDD will be giving priorities to projects that fall within three main categories:

- Place-Based Economics
- Health and Equity
- Resilient Communities

The next pages will delve more into each of these topics and list the type project and activities that are currently underway that serve each of the areas of interest.



PLACE-BASED ECONOMICS

The Place-based economics priority area includes all projects and activities that use the ECFRPC's expertise in land use analysis, industry cluster analysis, strategic planning, and economic modeling to assist local governments to diversify their economies, attract new investment, and generate jobs.

Since 2005, the ECFRPC has used the REMI PI+ model to estimate the economic impact of a variety of investments and activities including new infrastructure investments, business expansions, incentive packages, and public health interventions. This type of analysis traces spending through the regional economy and measures its cumulative effects of that spending. This includes estimating the direct, indirect and induced impacts that these activities can have on regional employment, sales (output), income, and gross regional product (GDP). In the next five years, EDD staff will be more intentional in incorporating the REMI PI+ model into the methodology of more projects.

The ECFRPC has also identified seven regional industry clusters that provide the best opportunity to spur economic growth in the East Central Florida region: antennas and telecommunications, aviation/aerospace, modeling simulation and training, photonics, tourism, turbine technologies, and watercraft. Based on staff research, these clusters show a high level of concentration, distribution across several counties, strong ties between producers and suppliers, and a high level of innovation. Within the next five years, the ECFRPC will flesh out these clusters and use the REMI model to estimate their value to the region.

Finally, the ECFRPC will continue supporting EDA's programs and initiatives within the East Central Florida region. These include, but are not limited to, promoting the agency's Public Works and Economic Adjustment Programs funding opportunities and bringing awareness to the region's Opportunity Zones. The next pages provide a good overview of this last program using the CEDS framework (people, economy, places).

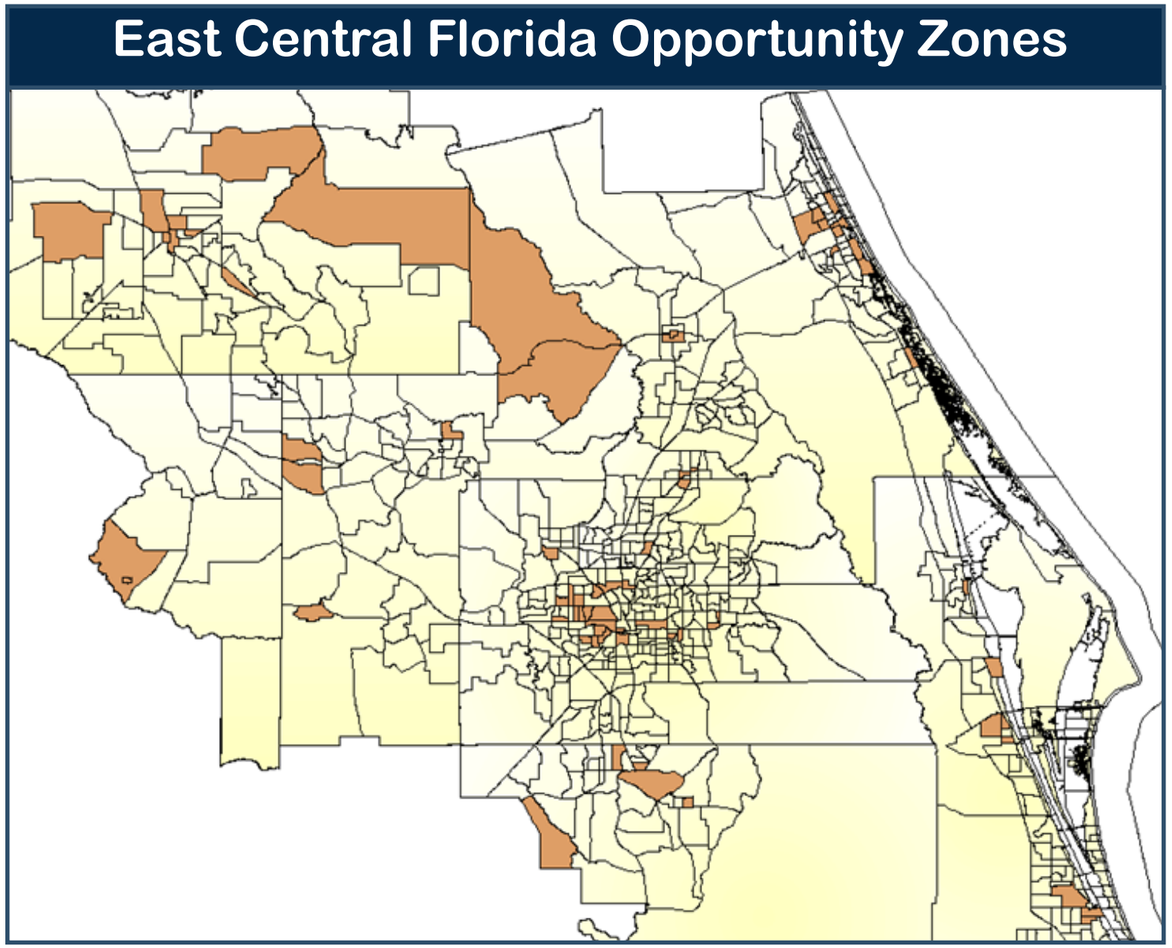
Place-based Economics	
Priority Areas	**Sample Projects /Activities**
Economic Impact Analysis	The Economic Impact of I Drive Resort Area S.R 405 Economic Impact Analysis The Value of Seminole County's Child Care Services Costs, Benefits, and Connectivity: Assessing Options for Flood Resilient Transportation Upgrades in Four Southeastern Coastal Communities
Industry Cluster Analysis	Regional Innovation Clusters Study Watercraft Innovation Center Community Economic Development Strategic Plans
EDA Priorities	Public Works and Economic Adjustment Programs Economic Technical Assistance Opportunity Zones

Opportunity Zones Assessment

Created under the 2017 Tax Cuts and Jobs Act, Opportunity Zones are economically-distressed communities where private investments, under certain conditions, may be eligible for capital gain tax incentives. The purpose of this program is to stimulate economic development and job creation by incentivizing long-term investments in low-income neighborhoods. Private investors can defer tax on any prior gains invested in a Qualified Opportunity Fund (QOF) until December 31, 2026.

EDA added Opportunity Zones as one of its investment priorities in 2019 to help support this federal economic revitalization effort. There are 70 designated Qualified Opportunity Zones located within East Central Florida. The distribution of these zones by county is as follows: Brevard (8), Lake (6), Marion (9), Orange (24), Osceola (5), Seminole (4), Sumter (2), and Volusia (12).

As an EDA Economic Development District, the ECFRPC is working to promote investment within these distressed areas by identifying the Opportunity Zones place-based assets. Using information from the different Property Appraiser Offices, EDD staff identified the location and distribution of all vacant nonresidential properties within the different zones in each of the counties. The ECFRPC decided to focus on non residential land because investment on these properties would lead to long-term economic development opportunities for the zone's residents. It is important to note that the comprehensiveness of data available varies widely by county, which sometimes limits the quality of this analysis.



Opportunity Zones by County	
County	# of Opportunity Zones
Brevard	8
Lake	6
Marion	9
Orange	24
Osceola	5
Seminole	4
Sumter	2
Volusia	12
Total	70

Source: ECFRPC.

There are 605 nonresidential vacant properties in Brevard County Opportunity Zones that comprise close to 1,500 acres. The average size for these properties is 2.4 acres, which is relatively small. The vast majority of these properties (78%) are owned by people living within the State of Florida. With over 245 acres, the biggest property owner within the Brevard Oportunity Zones is MLCI Investments Ltd.

There are 620 properties within Lake County Opportunity Zones, most of which are owned by people living within the State of Florida. Most of these properties are located within the cities of Leesburg (245), Mascotte (91), and the unincorporated community of Paisley. This last community is home to the most vacant non residential land (1,648.2 acres).

Marion County has a total of 732 properties that are considered to be vacant with nonresidential uses. These 732 properties contain a total of 3,641 acres available for development. Again, most of these properties are owned by Florida residents. Across the board, the average property size for all of Marion County is about five acres. RLR Investments LLC is by far the largest owner of opportunity parcels in Marion County with 136 acres across six properties.

In total, Orange County has 670 properties comprising a total of 797 acres of land. Being a large urban county, the average property size is under three acres. Benjamin Partners Ltd owns a total of 23 properties in Orange County with a total acreage of 18.9. However, Diamond Holdings Group LLC owns the most amount of acreage at 20.8 split between 4 properties. The City of Orlando is the jurisdiction with the highest amount of acreage at 280 followed by unincorporated Orange County with 207 acres. Similar to the other counties, most of the Opportunity Zones property owners are from the State of Florida.

In Osceola County, the vast majority of opportunity zones lie in the northern portion of the county, following the general pattern of development. By jurisdiction, most vacant non-residential properties are located in or near the City of Kissimmee (640). This represents 94% of nonresidential vacant properties within the county.

Vacant Non-Residential Land in County Opportunity Zones			
County	Total Acreage	Average Size (Acres)	Total Properties
Brevard	1,481	2.4	605
Lake	4,860.6	7.8	620
Marion	3,641	5	732
Orange	797.1	1.2	670
Osceola	4,816.9	7.1	679
Seminole	100.5	0.8	126
Sumter	47,229.6	34.8	1,358
Volusia	875.7	1	906

Sources: Property Appraiser Offices, ECFRPC Research

EDA Staff Visits Kennedy Space Center

Source; OpportunityZones.hud.org

Most of these properties are owned by large scale investors such as Avatar Properties Inc. (1,400 acres) and TCP II Reedy Creek (1,260.4 acres). The average property size in Osceola County is 7.1 acres, which is higher than the other counties.

Seminole County has the lowest amount of nonresidential vacant parcels (126 acres) totaling only 100.5 acres. The average parcel size is very small (0.8 acres). The land use data available for Seminole County was very limited which hindered the completion of a more throughout analysis.

While Sumter County is the least populated of all the EDD counties it contains over 1,358 properties in Sumter County that are considered to be vacant non-residential. These properties comprise a total of 47,223 acres available for development. The county also has the highest average property size at 34.8 acres.

Finally, Volusia County has 937 vacant nonresidential properties comprising almost 1,000 acres. Sixty-nine percent of this acreage is located in the vicinity of Daytona Beach. This jurisdiction was followed by South Daytona (94.7 acres) and DeLand (56 acres). The average parcel size for these properties is 1.1 acres.

Based on this overview, it seems that that there are enough vacant properties to attract new development to the East Central Florida Opportunity Zones. Moreover, most of these parcels are owned by people that live within the State of Florida. On the downside, the average parcel size for most of these properties is small, which could limit the types of developments that could locate within the Opportunity Zones. In the next five years, the East Central Florida EDD will work with local jurisdictions and organizations to promote investment within these distressed communities.

Source: http://www.wbiw.com/

HEALTH AND EQUITY

The Health and Equity priority area focuses on the development of partnerships and projects that foster social mobility and prosperity across region's communities by spurring entrepreneurship, promoting economic revitalization and neighborhood redevelopment, addressing the social determinants of health, and increasing access to fresh food.

For the past eight years, EDD staff has been working on projects to strengthen East Central Florida's food system. This started with supporting the creation of the region's Food Policy Council, Good Food Central Florida, in 2013. Since then, ECFRPC staff has been awarded $240k in grants and contracts to support regional food systems work. The ECFRPC's work has focused on using food production systems to generate jobs, foster entrepreneurship opportunities, and revitalize distressed communities. Because of this body of work, EDD staff has been invited to partner with several national organizations that support regional food systems including the Wallace Center at Winrock International, the Council of Development Finance Agencies, and the CLEO Institute.

At the local level, the ECFRPC has also partnered with several county Health Departments to identify projects that address health disparities within the region. At this moment, the EDD's Program Manager is coleading Healthy Seminole's Healthy Physical Activity Working Group. As part of this initiative, the ECFRPC is interested in estimating the long-term economic impact of health interventions in Seminole County. There have also been preliminary discussions to develop an equity profile for the East Central Florida region. Of most importance for EDD staff is to identify models that foster more inclusive economic development in our region.

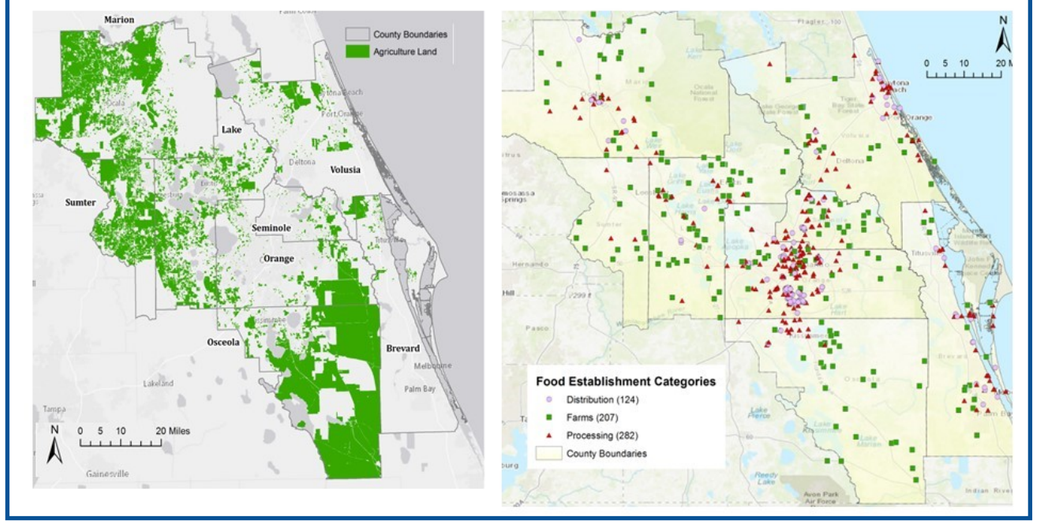
Health and Equity	
Priority Areas	**Sample Projects /Activities**
Regional Food Systems	Good Food Central Florida Council of Development Finance Agencies Food Systems Advisory Taskforce East Central Florida Food Resiliency Project
Health and Planning	Healthy Seminole Initiative Goldsboro Farmers Market Advisory Council
Equitable Communities	An Equity Profile of East Central Florida

Regional Food Systems Analysis

In 2013, the ECFRPC started a regional food systems program focused on developing innovative methods to assess and strengthen regional food systems and identifying ways in which they can be used to generate jobs, foster entrepreneurship, and revitalize distressed communities. While relatively new, this program has been a success. The ECFRPC has attracted $300,000 in grants and contracts to develop food systems projects across the region, and has partnered with national organizations like the Council of Development Finance Agencies and the Wallace Center at Winrock International. Using funding provided by Wallace, the ECFRPC developed a Regional Food Assets Inventory to help planners and economic development officials from across the region visualize the expanse and potential of the region's food systems. These assets include both agricultural lands and food production businesses (farms, processors, distributors). In addition to this GIS analysis, EDD staff also examined how the region's 35 largest jurisdictions regulate food production uses. EDD staff will use the information from these two analyses to develop new economic development strategies that incorporate regional food production systems. As part of this process, the EDD staff recently completed a draft food systems ordinance for the City of Orlando that incorporates some of these principles.

The advent of the COVID-19 pandemic and the subsequent economic crisis it spurred have accelerated the need to develop comprehensive policies to address gaps in regional food systems. There have been significant disruptions in the nation's food supply chain, which has also affected Florida residents access to fresh food. Increasing local food production can help to increase the social, economic, and environmental well-being of our region. To assist with this effort, the ECFRPC applied to and was awarded a Community Planning Technical Assistance Grant from the Florida Department of Economic Opportunity to develop the East Central Florida Food Resiliency Action Plan. The plan will use information from the inventory and zoning audit to inform a SWOT analysis of East Central Florida's Food Systems and develop a matrix that outlines tasks that different stakeholders can take to increase the regional food production system's resiliency. This matrix will also include a descriptor for "assigning" the tasks so entities can better deduce which ones are most applicable to them.

Distribution of Food Production Assets Across East Central Florida



Regulation of Food Production Uses in East Central Florida's Largest Jurisdictions

Agriculture
- LIVESTOCK: animal feedlots, keeping, and husbandry, grazing and pasturing; dairy and poultry farms, hog farms
- PRODUCE: vegetable farms, groves, and orchards, horticulture, nurseries; retail and wholesale), community gardens; farm and roadside fruit stands
- OTHER: bee keeping, aqua- and pisciculture, aviaries, compost, worm-raising

Processing
- PRODUCE: packing and processing (fruits and vegetables), food manufacturing
- PROTEINS: dairy/dairy products, hatcheries/egg processing, prepared meat products, seafood, slaughterhouse, meat packing plants
- BEVERAGES: non-alcoholic beverages, wineries, distilleries, artisan and craft beverages, coffee, tea, ice
- MISCELLANEOUS: Retail and Wholesale bakeries, candy and confectionary, spices, cottage food operations, frozen deserts, craft foods

Wholesale Distribution
- PRODUCE: Farmers, grocers, wholesale producers, craft foods
- PROTEINS: Dairy, poultry, seafood, meat and meat products (no butchering),
- BEVERAGES: bottled water, soft drinks, alcoholic beverages, craft beverages
- FROZEN: Cold storage / frozen foods

Source: ECFRPC research

RESILIENT COMMUNITIES

The purpose of the EDD's Resilient Communities Program is to help prepare East Central Florida's communities so they can recover quickly from both natural and economic shocks such as natural disasters, sea level rise, and loss of large employers. The idea here is not to just return these communities to their previous state, but also help them to reduce recovery times and improve by addressing the structural issues that they are currently facing.

In 2017, the ECFRPC developed the Regional Resiliency Action Plan for Brevard and Volusia counties in conjunction with 70 stakeholders. The plan's goals and strategies focus on four main areas: leadership and strategy, economic and society, infrastructure and environment, and health and well-being. Since then, the ECFRPC has been awarded over $200k in grants to develop resiliency plans for various municipalities. This includes the Cocoa Business Resiliency Plan, which was recently funded by the U.S. Economic Development Administration. Several of these projects incorporate the REMI PI+ model to estimate the economic benefits of doing green infrastructure interventions.

Parallel to these efforts, the ECFRPC has been organizing the East Central Florida Regional Resiliency Collaborative. With over 30 members, the objective of this group is to develop framework to address resilience issues within the region. As part of this effort, the ECFRPC is coordinating five technical advisory subcommittees: Risk and Vulnerability Assessment, Health and Equity, Green, Gray, Blue Infrastructure, Engagement and Academy Development, and Economic Resilience. EDD staff will provide technical support to this last subcommittee.

Resilient Communities	
Priority Areas	**Sample Projects /Activities**
Resiliency Planning	Resilient Community Plans COVID-19 Suport Activities
East Central Florida Collaborative	Economic Resilience Technical Advisory Committee

East Central Florida Regional Resiliency Collaborative Sign up Ceremony

Economic impact of the COVID-19 pandemic

The COVID-19 Pandemic is unprecedented in terms of the rapid and sweeping economic changes brought by shutdowns, travel restrictions, and reduced personal spending. As a first step to assist with recovery efforts, the EDD used the REMI PI+ model to prepare an economic impact analysis of the pandemic in the region's eight counties.

EDD staff used multiple data sources to develop this simulation including monthly Orange County Tourism Development Tax reports, U.S. Bureau of Labor Statistics industry employment data, and monthly passenger traffic reports from the Greater Orlando Aviation Authority, among others. Based on this information and the state's reopening plan, staff reduced the sales for the hardest hit industries including Accommodation and Food Services, Retail Trade, and Transportation. According to staff's research, the region's economy started its steep economic deceleration in March. Industry sectors like Air Transportation, Arts and Recreation, and Accommodations suffered 80-90% declines in their operations from May to June. The ECFRPC assumed that this loss of capacity translated into sales losses. The ECFRPC also assumed that all industries within the Leisure and Hospitality industry will take more time to recover. On the other hand, industries like Construction, Manufacturing, and Wholesale Trade were mostly able to keep their operations intact during the pandemic.

According to the REMI model, the COVID-19 pandemic could cost the region almost 400,000 jobs. The results of this simulation also estimate that the region could lose $48 billion in sales, and $17.6 billion in personal income. The region's GDP will be reduced by a total of $27.8 billion, mostly due to reduced personal consumption.

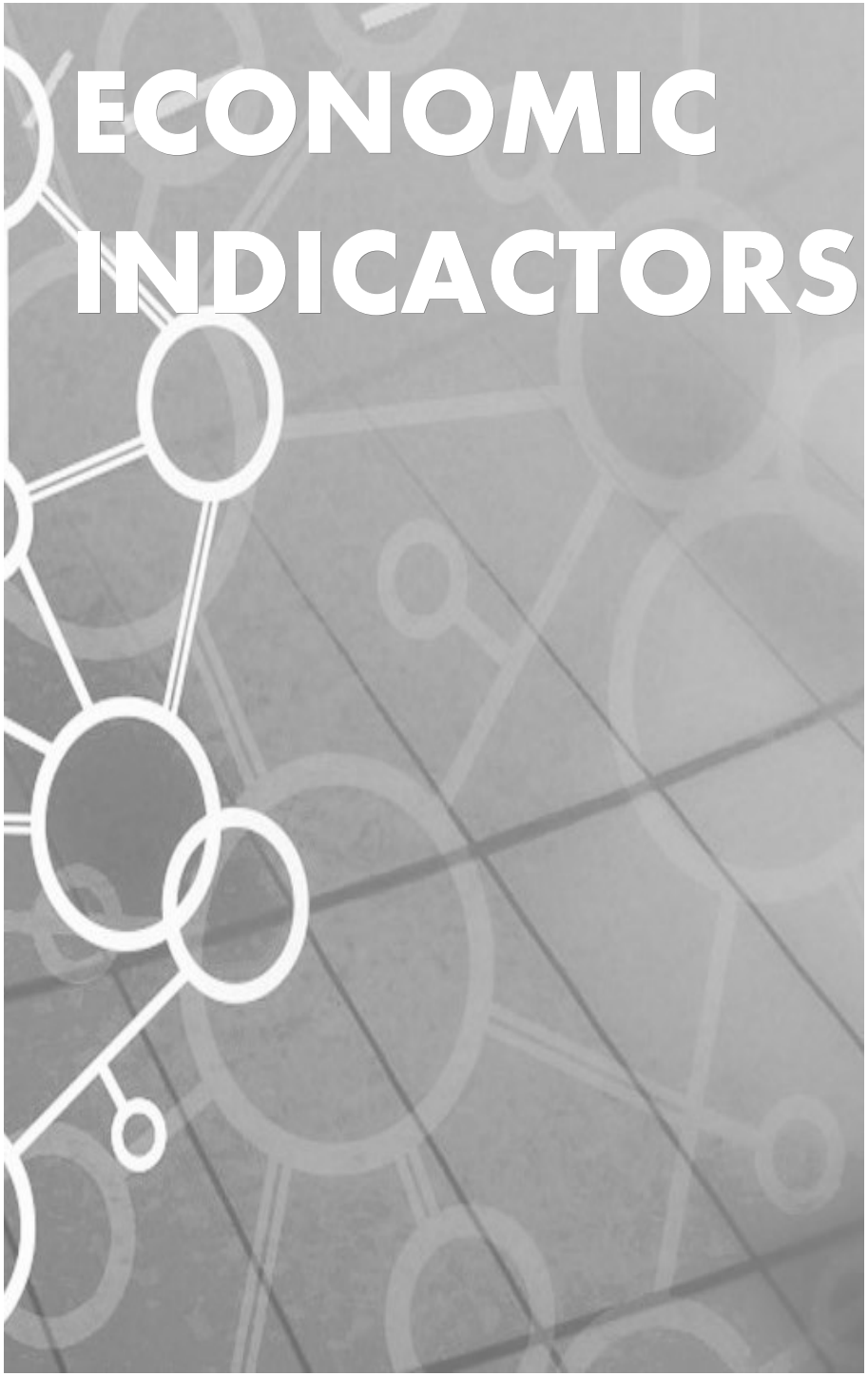
The impacts of the COVID-19 Pandemic on the region's economy are ongoing. In the next couple of years, the economic recovery of the East Central Florida region will be dependent on the recovery of tourism and hospitality industries, including the recovery of personal spending. The data used to develop this analysis went through June 2020. Therefore, the ECFRPC will try to repeat this simulation with more recent data. Moreover, the agency will be using its recently awarded CARES grant to assist local jurisdictions and businesses with economic recovery.

Summary of Economic Results	
Economic Indicator	**2020**
Total Employment	-391,933
Gross Domestic Product	-$27,830,000,000
Output	-$47,991,000,000
Personal Income	-$17,556,000,000

Source: REMI PI+ East Central Florida v2.4.1

PROJECTS

PILLAR	PROJECT	DESCRIPTION	COUNTY/ REGIONAL	PARTNER AGENCIES	JOBS CREATED	POTENTIAL FUNDING SOURCES
PEOPLE	Agricultural Business and Research Cluster	Agricultural business and research facility dedicated to studying citrus greening and the promote best practices in raising beef cattle.	Sumter	Sumter County, UF/IFAS, Agromillora Group, Local ag businesses	TBD	Sumter County
	Center for Advanced Manufacturing & Innovative Design	Business accelerator and enabler allowing US manufacturers to understand the latest approaches in manufacturing	Regional	FIT, City of Palm Bay	300	U.S. EDA, State of Florida, Brevard County, City of Palm Bay, Public/Private Partnerships, Private/Corporate Investment
	Florida Advanced Manufacturing Research Center	Establish state-of-the-art research and incubation facility for next generation smart sensors technologies and applications.	Regional	UCF and Osceola County	TBD	U.S. EDA, Osceola County
	Florida Tech Research Park (FTRP) – NASA Broadband Phase (NBP)	Leverage commercial, university and airport assets within a network of research parks to drive airport activity and regional innovation.	Regional	FIT, City of Melbourne, Melbourne Economic Enhancement District	TBD	U.S. EDA, State of Florida, Brevard County, City of Melbourne, Melbourne International Airport, Private funding
	Kissimmee Gateway Airport's Aerospace/Aviation School Partnership	Public private partnership to allow students access to airport resources and familiarize them with aviation industry.	Osceola	Osceola County	TBD	City of Kissimmee, Kissimmee Gateway Airport
	Lake Tech Center for Advanced Manufacturing	Training Center to prepare students in manufacturing processes.	Regional	Lake Tech, Lake County School Board	TBD	U.S. EDA, State of Florida, Lake County
	Smart (Library) Zones	Re-brand library system to transform into innovation and collaboration centers to promote lifelong learning center for workforce.	Lake	Lake County	TBD	Lake County
ECONOMY	Center for the Advancement of Science in Space/ISS National Laboratory	Administer research projects that advance scientific understanding and provide opportunities for additional energy-related science.	Brevard	Space Florida	100	NASA
	Commercial Space Port	Develop commercial space launch facilities and supporting industries near current Kennedy Space Center complex.	Brevard/Volusia	Space Florida	TBD	U.S. EDA, Private
	East Central Florida Industry Cluster Analysis	Identify regional and county traded industry clusters and their workforce	Regional	ECFRPC	None	U.S. EDA
	Florida Energy & Aerospace Technology Park	Develop a 3,300-acre technology park in Leesburg near intersection of County Road 470 and Florida's Turnpike.	Lake	Leesburg	500	U.S. EDA
	Florida UAV/UAS Test Range	Rapid takeoff and landing airspace channel for NASA, DOD and commercial spaceport activities.	Brevard	Space Florida	350	U.S. EDA
	Florida Unmanned Aerial Vehicles (UAV)/Unmanned Autonomous Systems (UAS) Test Range	Establish statewide testing range to support the development and commercialization of UAV and UAS.	Regional	Space Florida	200-500	U.S. EDA
	Inland Port and Advanced Manufacturing Hub	Develop an inland port and advanced manufacturing hub in Titusville.	Brevard	Port Canaveral		Private Funding
	International Space Life Sciences Flight Hub	Improvements to Space Life Sciences Lab at KSC to secure management of National Lab component of the International Space Station.	Brevard	Space Florida	250	U.S. EDA
	International Speedway Boulevard (ISB) Corridor	Public-private partnership focused on promoting economic development along the ISB corridor in Daytona Beach	Volusia	City of Daytona Beach, NASCAR	TBD	Private Funding
	Orange County Food Assessment	Study opportunities to expand food production (agriculture and processing) and distribution activities in Orange County.	Orange	ECRPC, City of Orlando, Good Food Central Florida	NA	Local Governments, DEO
	Florida Turbine Initiative	Promote importance of this regional industry and work with local firms /research institutes to develop more efficient turbine technologies	Regional	Energy Florida	25-40	U.S. EDA, U.S. DOE
	SunRail - DeLand Station	Support development of SunRail station planned for City of DeLand	Volusia	Volusia County, City of DeLand, ECFRPC, FDOT	TBD	FDOT
	Beville Property	Support water and sewer infrastructure investments to serve 308-acre industrial site.	Sumter	Sumter County. City of Bushnell, SECO, Beville's	N/A	Sumter County, City of Bushnell, SECO, Beville's
	Daytona Beach International Airport Infrastructure Projects	Public infrastructure improvements in support of Embry-Riddle Aeronautical University's new research Park and development of aviation/aerospace regional employment center.	Volusia	Volusia County, City of Daytona Beach	TBD	U.S. EDA
	East Central Florida Broadband - Connecting the Region's Healthcare Resources	Study broadband and Wi-Fi accessibility in East Central Florida to connect region's healthcare activity centers.	Regional	ECFRPC, Health Council of East Central Florida	TBD	U.S. EDA
	Food Manufacturing and Distribution	Develop cold storage distribution facility to attract food manufacturers for regional distribution warehousing.	Sumter	Sumter County, Time Definite Services	TBD	U.S. EDA, Sumter County
	Williamson Blvd. Economic Development Project	Four-Laning a one mile long section of Williamson Blvd. beginning in Daytona Beach and ending in Ormond Beach, supporting regionally significant job creation in 1,000 acre area.	Volusia	State of Florida, City of Daytona Beach	TBD	State of Florida
PLACES	Creative Village - Orlando	Redevelop former Amway Arena site into a mixed-use, transit oriented development to attract digital media companies.	Orange	City of Orlando, UCF	8,000	City of Orlando, TIGER Grant, UCF, Private Funding
	East Central Florida Regional Multi-Use Trails Network	Create a series of trail systems across the region.	Regional	ECFRPC, DEP, Florida Greenways and Trails Foundation	TBD	U.S DOT, FDOT, DEO
	Lake Nona Medical City	Support the development of a life science-health care cluster in East Orlando.	Orange	City of Orlando	25,000	City of Orlando, Tavistock
	U.S. 192 Bus Rapid Transit (BRT)/Internal Circulator	BRT to connect Kissimmee's proposed multimodal center to downtown and Vine Street neighborhoods.	Osceola	Osceola County, City of Kissimmee	TBD	Lynx
	Interstate 4/State Road 472 Activity Center	This strategically located interchange is envisioned to become one of Volusia County's principal employment centers.	Volusia	Volusia County	TBD	Local Governments
	Florida Crossroads Industrial Activity Center	Land use changes and infrastructure improvements to create major industrial park in the vicinity of I-75 and the Florida Turnpike.	Sumter	Sumter County, FDOT, CSX, Monarch Ranch, PJ Sola LLC, Wade Industrial, Pike 75, Mid Florida	TBD	Sumter County, FDOT, CSX, Monarch Ranch, PJ Sola LLC, Wade Industrial, Pike 75, Mid Florida
	Regional Water Treatment and Supply Improvements	Protection of Indian River Lagoon Estuary/Mosquito Lagoon and the Blue Springs Basin through infrastructure improvements.	Regional	St. Johns River Water Management District	TBD	State of Florida, U.S. EDA, Volusia County
	Volusia County Marine Science Center (MSC) Expansion	Construct an expanded marine education/rehabilitation facility for the Volusia County Marine Science Center which has rehabilitated over 30,000 sea turtles and shorebirds, and hosted nearly 800,000 visitors.	Regional	St. Johns River Water Management District	TBD	State of Florida, U.S.EDA, Volusia County, Public, Private/Corporate Investment


ECONOMIC
INDICACTORS

People

High School Graduation Rates	
County	Rate
Brevard	87.5%
Lake	78.1%
Marion	81.9%
Orange	81.3%
Osceola	82.0%
Seminole	88.3%
Sumter	84.6%
Volusia	76.0%

source: www.fldoe.org/eias/eiaspubs/pubstudent.asp

Average Annual Unemployment Rates (2016)	
County	Indicator
Brevard	5.2%
Lake	4.9%
Marion	5.8%
Orange	4.4%
Osceola	5.0%
Seminole	4.3%
Sumter	7.0%
Volusia	5.1%

source: http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/local-area-unemployment-statistics

Eighth Grade Math Performance		
County	Mean Scale Score	% in Level 3 or Above
Brevard	331	43%
Lake	328	38%
Marion	331	43%
Orange	325	30%
Osceola	333	47%
Seminole	334	51%
Sumter	333	52%
Volusia	328	37%

source: http://fcat.fldoe.org/results/

Economy

Average Wage Per Week	
County	**Wage (in dollars)**
Brevard	$932
Lake	715
Marion	719
Orange	904
Osceola	707
Seminole	852
Sumter	746
Volusia	727

source: www.bea.gov/iTable/iTable.cfm?reqid=70&step=1

Daily Vehicle Miles Travelled	
County	**Indicator**
Brevard	17,941,104
Lake	6,609,228
Marion	12,204,166
Orange	39,723,296
Osceola	10,803,720
Seminole	11,010,832
Sumter	4,641,039
Volusia	16,280,142

source: http://www.dot.state.fl.us/planning/statistics/mileage-rpts/public.shtm

Gross Domestic Product	
County	**GDP (Billions)**
Brevard	21.32
Lake	8.07
Marion	8.39
Orange	90.29
Osceola	9.25
Seminole	19.77
Sumter	2.38
Volusia	15.41

source: REMI PI+

Annual Building Permits	
County	**Permits**
Brevard	2,915
Lake	3,966
Marion	1,428
Orange	11,952
Osceola	4,297
Seminole	3,039
Sumter	1,072
Volusia	1,900

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

Places

Percent of Persons Living in Poverty	
County	Rate
Brevard	13.4%
Lake	12.8%
Marion	18.7%
Orange	15.6%
Osceola	18.5%
Seminole	11.5%
Sumter	10.1%
Volusia	16.3%

source:
https://www.census.gov/data/datasets/2015/demo/saipe/2015-

Real Personal Per Capita Income	
County	Income
Brevard	38,722
Lake	38,182
Marion	30,948
Orange	37,021
Osceola	28,655
Seminole	28,655
Sumter	35,988
Volusia	37,275

source: REMI PI+

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East Central Florida Regional Planning Council

Resolution #03-2020

Support of the 2017 East Central Florida Comprehensive Economic Development Strategy (CEDS)

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 eight counties of Brevard, Lake, Marion, Orange, Osceola, Seminole, Sumter 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 2017 Comprehensive Economic Development Strategy (CEDS), for the East Central Florida Economic Development District; and

WHEREAS, the CEDS document was updated to include information about the region's Opportunity Zones and the COVID-19 pandemic as required by the Economic Development Administration of the U.S. Department of Commerce

NOW, THEREFORE, the East Central Florida Regional Planning Council, on November 18, 2020 hereby accepts and recommends approval to the U.S. EDA the 2020 East Central Florida Comprehensive Economic Development Strategy (CEDS).

Attest:

Sean Parks
Chair, ECFRPC

EAST CENTRAL FLORIDA
REGIONAL PLANNING COUNCIL:

Hugh W. Harling, Jr.
Executive Director