

Appendix C

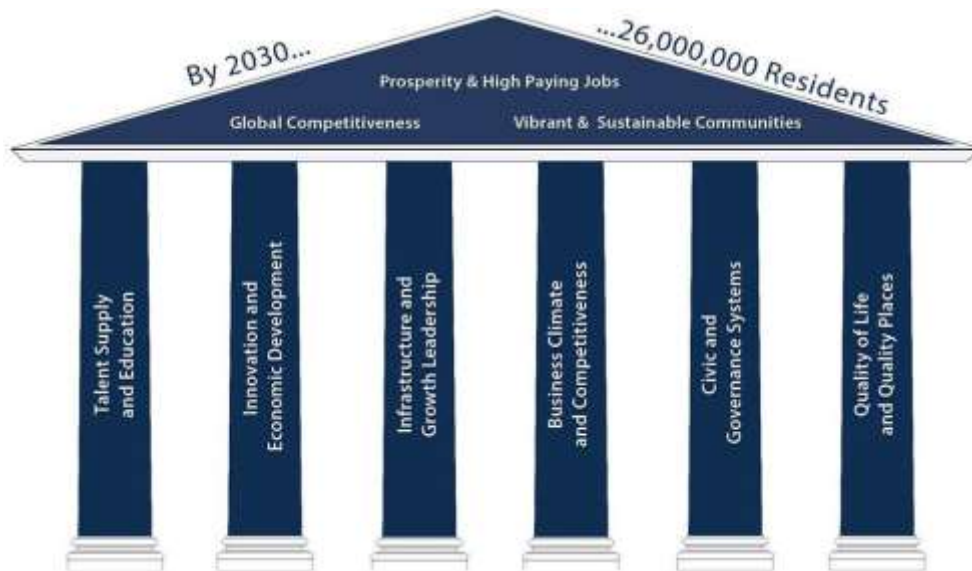
Six Pillars Data

Six Pillars Data Appendix

Overview

Northeast Florida has experienced significant growth in recent years, with increased employment and virtually uninterrupted growth across nearly all of its industries. With rapid growth comes a variety of challenges and the CEDS plays a significant role in how the region will respond to these as an economically viable community. The Region’s 2014-2019 CEDS utilized the Florida Chamber Foundation’s Six Pillars Strategy as a framework for goals and objectives.

Florida Chamber Foundations’ Six Pillar Strategy



Source: 2019 Florida Chamber of Commerce

Updates to key metrics from the Six Pillars metrics of the 2009-2014 CEDS were completed to identify trends, patterns and changes in the Regional economy from adoption and initial implementation strategy. Analysis of the data can be framed by the following questions:

- What are the region’s principal growth sectors and clusters?
- What is driving the economy and where is it headed?

The 2019 CEDS continues to incorporate the Six Pillars as guidance for the prioritization of goals and objectives. The 2014-2019 CEDS focused on six regional goals and 12 objectives. This update carries on with the goals and objectives identified in the previous plan, recognizing the importance of these indicators in capitalizing the resources of the region and solving our economic problems. The following performance metrics aid Florida’s Regional Planning Councils in monitoring and evaluating projects and strategies, each metric is organized by corresponding pillar strategy. Several of the metrics examined for Elevate are mirrored in the following measures, and the location of these direct comparisons in the strategy can be found below.

Six Pillars Metrics

Talent Supply & Education

- Average Annual Wage
- High School Graduation Rates

Innovation & Economic Development

- Gross Domestic Product
- Bed Tax Collections
- Trade Exports

Infrastructure & Growth Leadership

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

Business Climate & Competitiveness

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

Civic and Governance Systems

- Registered Nonprofit Organizations

Quality of Life & Quality Places

- Per Capita Income
- House Purchase Price and Cost Index
- Persons Living in Poverty

Talent Supply / Education

Average Annual Wage by Industry

Average annual wages in the region have increased over the past decade by 3.1%. Please refer to Report 1: Economic Assessment & Community Benchmarking, page 26, of Elevate for additional information on this performance measure.

High School Graduation Rates

Public high school graduation rates have steadily increased in the past several years.

Table 1. High School Graduation Rates for Northeast Florida, 2008-9 to 2018-19

Year	2013-14	2013-14	2014-15	2014-15	2015-16	2015-16	2016-17	2016-17	2017-18	2017-18
	<i>Number of Graduates</i>	<i>Percent (%) of Graduates</i>	<i>Number of Graduates</i>	<i>Percent (%) of Graduates</i>	<i>Number of Graduates</i>	<i>Percent (%) of Graduates</i>	<i>Number of Graduates</i>	<i>Percent (%) of Graduates</i>	<i>Number of Graduates</i>	<i>Percent (%) of Graduates</i>
Baker	258	75.2%	243	81.8%	246	79.4%	269	81.0%	287	75.5%
Clay	2,402	80.1%	2,506	83.7%	2,608	84.7%	2,672	88.4%	2,756	90.7%
Duval	6,017	74.0%	6,481	76.6%	6,482	78.8%	6,863	80.8%	7,282	85.1%
Flagler	754	77.8%	826	77.5%	790	80.4%	815	81.1%	909	88.0%
Nassau	777	89.9%	770	90.9%	780	91.4%	874	90.9%	864	92.8%
Putnam	414	58.2%	383	54.9%	436	63.6%	512	72.2%	603	84.8%
St. Johns	2,203	87.8%	2,277	90.5%	2,294	91.2%	2,552	90.9%	2,791	93.3%

Source: Florida Department of Education, Data Publications and Reports: Students, www.fldoe.org/eias/eiaspubs/pubstudent.asp

Innovation and Economic Development

Gross Domestic Product

Gross Domestic Product (GDP) is the total value of all goods and services produced within a given region. Per capita gross regional product rose 5% in the last decade. GDP figures for northeast Florida can be found in Report 1: Economic Assessment & Community Benchmarking, page 27 of Elevate.

Trade Exports

Table 2 shows the total value of goods and services exported out of the region, measured in fixed 2009 dollars (in order to correct for inflation). Trade export figures for east Florida are provided by REMI (Regional Economic Modeling, Inc.).

Table 2. Exports (in billions of 2009 dollars), 2015-2020

	Baker	Clay	Duval	Flagler	Nassau	Putnam	St. Johns	Region
2015	\$141,000,000.00	\$1,011,000,000.00	\$12,315,000,000.00	\$639,000,000.00	\$345,000,000.00	\$448,000,000.00	1,488,000,000.00	\$16,387,000,000.00
2016	\$152,000,000.00	\$1,067,000,000.00	\$12,555,000,000.00	\$575,000,000.00	\$351,000,000.00	\$439,000,000.00	\$1,513,000,000.00	\$16,652,000,000.00
2017	\$157,000,000.00	\$1,097,000,000.00	\$12,858,000,000.00	\$591,000,000.00	\$361,000,000.00	\$450,000,000.00	\$1,558,000,000.00	\$17,072,000,000.00
2018	\$162,000,000.00	\$1,129,000,000.00	\$13,229,000,000.00	\$609,000,000.00	\$369,000,000.00	\$461,000,000.00	\$1,607,000,000.00	\$18,566,000,000.00
2019	\$166,000,000.00	\$1,164,000,000.00	\$13,637,000,000.00	\$628,000,000.00	\$376,000,000.00	\$472,000,000.00	\$1,659,000,000.00	\$18,102,000,000.00
2020	\$170,000,000.00	\$1,189,000,000.00	\$13,872,000,000.00	\$642,000,000.00	\$380,000,000.00	\$479,000,000.00	\$1,696,000,000.00	\$18,428,000,000.00

Source: REMI PI+

Bed Tax Collections

Tourist Development Taxes, colloquially known as “bed taxes,” are levied as a local option by Florida’s counties. The revenues are used for construction of tourist-related facilities, tourist promotion, and beach and shoreline maintenance, per Florida Statutes §125.01041.

Table 3. Tourist Development Tax Revenues, 2011-2015

Code 39 Accommodation Taxes	Baker	Clay	Duval	Flagler	Nassau	Putnam	St. Johns
2011	\$17,225.00	\$436,413.00	\$9,683,710.00	\$1,360,177.00	\$2,977,004.00	\$216,218.00	\$6,552,707.00
2012	\$29,999.00	\$470,110.00	\$10,431,448.00	\$1,564,177.00	\$3,121,533.00	\$266,655.00	\$7,117,175.00
2013	\$31,758.00	\$503,258.00	\$10,995,297.00	\$1,685,503.00	\$3,865,593.00	\$264,862.00	\$7,662,836.00
2014	\$29,922.00	\$539,405.00	\$12,384,838.00	\$1,886,962.00	\$4,546,081.00	\$285,329.00	\$8,415,768.00
2015	\$34,719.00	\$599,159.00	\$13,482,136.00	\$2,066,777.00	\$5,073,204.00	\$316,462.00	\$9,577,805.00

Source: Visit Florida, Florida Visitor Study 2012, Florida Visitor Study 2014, Florida Visitor Study 2015, Florida Visitor Study 2016

Infrastructure and Growth Leadership

Population Counts and Projections

Table 4 shows the population of each county in the region from 2010 according to the decennial census, as well as decennial projections of population from 2020 to 2035.

Table 4. Population Counts and Projections, 2010-2035

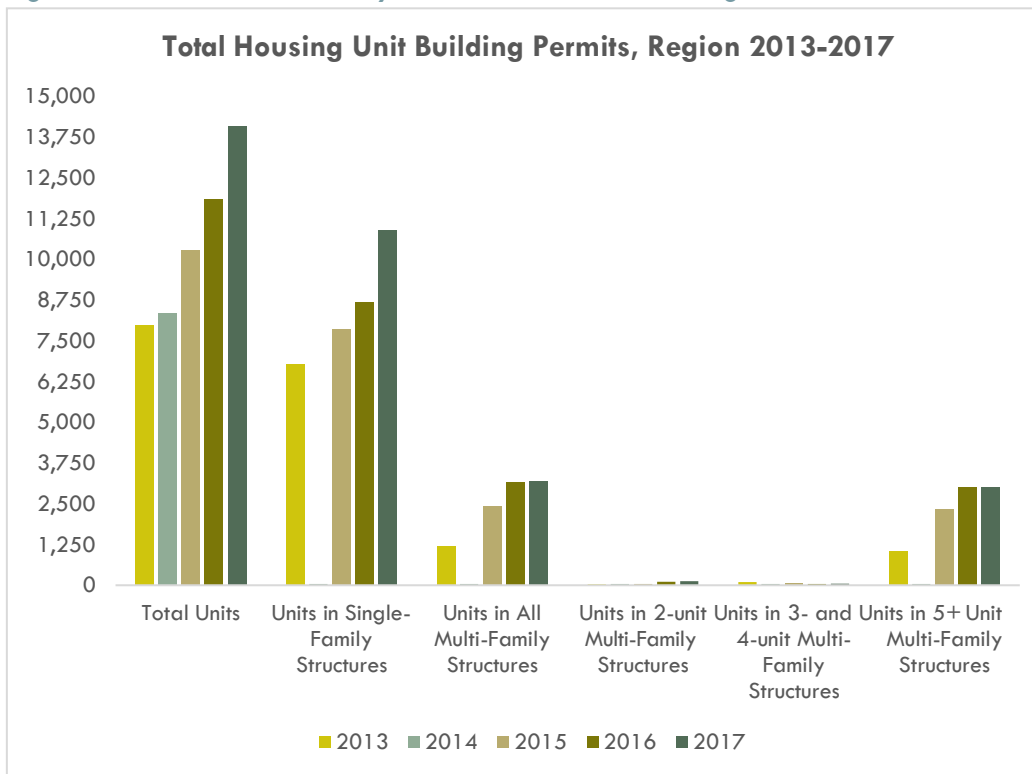
Population (In Millions)	Baker	Clay	Duval	Flagler	Nassau	Putnam	St. Johns	Region
2010	0.027	0.191	0.866	0.096	0.074	0.074	0.191	1.519
2015	0.027	0.203	0.912	0.105	0.078	0.072	0.227	1.624
2020	0.029	0.227	0.982	0.120	0.085	0.074	0.266	1.783
2025	0.031	0.244	1.029	0.132	0.089	0.075	0.296	1.896
2030	0.032	0.261	1.069	0.142	0.092	0.077	0.323	1.996
2035	0.033	0.277	1.104	0.151	0.094	0.079	0.347	2.085

Source: REMI PI+

Annual Building Permits

Building permits issued annually have increased in the region since 2013.

Figure 1. Annual New Privately-Owned Residential Building Permits



Source: US Census Bureau, Annual New Privately-Owned Residential Building Permits, Total Units, for Counties in Florida <http://censtats.census.gov/bldg/bldgprmt.shtml>, <https://socds.huduser.gov/permits/index.html>

Daily Vehicle Miles Traveled

An increase of 1-3 percent annually in the region's Daily Vehicle Miles Traveled has occurred beginning in 2013.

Table 5. Daily Vehicle Miles Traveled per Lane Mile, 2013-2017

	Baker	Clay	Duval	Flagler	Nassau	Putnam	St. Johns	Region
2013	1,471,994	4,280,954	28,028,016	2,882,235	2,831,731	2,622,576	6,385,121	48,502,627
2014	1,490,459	4,393,709	28,500,631	3,554,788	2,963,904	2,662,167	6,978,491	50,544,149
2015	1,617,079	4,557,934	29,779,696	3,679,679	3,029,783	2,740,225	7,273,542	52,677,938
2016	1,674,709	4,755,909	30,829,152	3,766,531	3,189,076	2,843,159	7,624,417	54,682,953
2017	1,667,024	4,844,083	31,378,296	3,787,446	2,987,005	2,895,649	7,988,496	55,547,999

Source: Florida Department of Transportation, Public Road Mileage and Travel (DVMT) Report, <https://www.fdot.gov/statistics/mileage-rpts/#Public>

Business Climate and Competitiveness

Average Annual Unemployment Rates

Over the past decade, annual average unemployment rates in the region were lowest in 2007 (3.4 percent) before rising each year from 2007 to 2010. Unemployment rates have fluctuated but decreased steadily since 2011 with unemployment rate close to the lowest rate of 2007, with unemployment at 3.5 percent in 2017. Average annual unemployment rates for northeast Florida can be found on page 11 of Report 1: Economic Assessment & Community Benchmarking of Elevate.

Employment by Industry

Employment by industry for the region and the number of people in the region employed in the major industry groups established by the North American Industry Classification System (NAICS) can be found on page 25 of Report 1: Economic Assessment & Community Benchmarking in Elevate.

Average Annual Wages by Industry

Industry wages have experienced slow growth over the past decade. The average annual wage for workers in each of the major industry groups established by the North American Industry Classification System (NAICS) for each county in the region can be found on page 26 of Report 1: Economic Assessment & Community Benchmarking in Elevate.

Civic and Governance Systems

Registered Nonprofit Organizations 501(c)3

Table 6 shows the total number of registered 501(c)(3) nonprofit organizations in each county in the region in 2009.

501c3 Organizations	Baker	Clay	Duval	Flagler	Nassau	Putnam	St. Johns	Region
2019	66	593	4,777	378	394	351	995	7,554

Source: Internal Revenue Service, Exempt Organizations Business Master File, 501(c)(3) Charities, The Urban Institute, National Center for Charitable Statistics, http://nccsdataweb.urban.org/tablewiz/tw_bmf.php

Quality of Life and Quality Places

Per Capita Income

Per capita personal income is defined as the income received by all persons from all sources (including transfer payments, and measured before personal taxes are deducted), divided by the total population. Table 5 shows per capita personal income in each county, in current dollars.

Table 7. Real Change in Per Capita Income, 2013-2017

Thousands of Current Dollars	Baker	Clay	Duval	Flagler	Nassau	Putnam	St. Johns
2013	\$ 34.14	\$ 33.05	\$ 52.21	\$ 26.92	\$ 34.79	\$ 35.51	\$ 33.42
2017	\$ 35.24	\$ 35.67	\$ 55.61	\$ 28.68	\$ 35.72	\$ 36.97	\$ 37.07

Source: REMI PI+

House Purchase Price and Cost Index

The House Cost Index is a measure of single-family house prices relative to statewide prices. Elevate shows proxy metrics (i.e. Cost of Living Index and Ratio of Median Home Value to Median Household income) in Pages 55-57 of Report 1: Economic Assessment & Community Benchmarking.

Persons Living in Poverty

The amount of persons living in poverty indicate the prosperity of a region. As per Elevate, “High poverty levels often reflect limited job opportunities or low educational attainment in a community...” The number of persons living in poverty in the region has declined from 2011 to 2016. To review these metrics for the region, refer to Report 1: Economic Assessment & Community Benchmarking, page 58.