



Report 1:
Economic Assessment & Community Benchmarking



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Introduction

About the Strategy

In March 2018, the JAXUSA Partnership, Northeast Florida Regional Council, CareerSource Northeast Florida, and other partners initiated a Regional Economic Development Strategy to improve regional competitiveness and collaboration throughout Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns counties. Avalanche Consulting, a national economic development consultancy, and the Council for Adult and Experiential Learning (CAEL), a national nonprofit focused on lifelong learning, were selected to facilitate the preparation of the economic development and workforce development strategy.

The Elevate Northeast Florida Strategy will serve as a guide for policies, programs, and investments that ensure the region's continued economic dynamism. Once complete, Elevate Northeast Florida will have four reports:

Report 1: Economic Assessment & Community Benchmarking

This first report of the Elevate Northeast Florida Strategy includes in-depth analysis of the region's current economic and demographic conditions in comparison to national and statewide trends, as well as selected benchmark regions. The first report also includes a SWOT Analysis (strengths, weaknesses, opportunities, and threats) based on both quantitative and qualitative information gathered through focus groups, interviews, and an online survey.

Report 2: Target Industry Validation & Update

Report 2 will examine the current status of the region's existing target industries and competencies and identify emerging niche sectors that can be integrated into an updated target list for future economic development efforts. The Target Industry Validation & Update will include written profiles for each target industry as well as county-specific opportunities for growth and investment. The report will conclude with marketing playbooks for each niche sector.

Report 3: Workforce Development Assessment

The Workforce Skills Assessment will analyze the skill sets of Northeast Florida's workforce and highlight workforce attributes that distinguish Northeast Florida from the competition or need improvement. Report 3 will also include an examination of existing educational pathways, current and potential gaps in workforce supply, and opportunities for transitioning workers to higher growth careers.

Report 4: Marketing & Strategic Plan

The final report of Elevate Northeast Florida will provide marketing and community investment recommendations to help the region be even more competitive globally. Report 4 will also include an implementation timeline, estimated budget, and performance metrics that will equip Northeast Florida leaders with the tools it needs to successfully implement the Strategy.



Project Partners

The Elevate Northeast Florida Strategy is made possible by CareerSource Northeast Florida, the JAXUSA Partnership, Northeast Florida Regional Council (NEFRC), Florida Power and Light, Jacksonville Aviation Authority, Jacksonville Civic Council, Jacksonville Port Authority, Jacksonville Transportation Authority, JEA, and Northeast Florida Regional Transportation Commission, with funding provided by the US Department of Commerce Economic Development Administration. The Strategy was led by Avalanche Consulting the Council for Adult and Experiential Learning (CAEL) with input from local residents, public organizations, and private businesses.

JAXUSA Partnership

JAXUSA Partnership is a private, nonprofit division of the JAX Chamber and is Northeast Florida's regional economic development initiative. Its mission is to be a catalyst for economic growth and maximize the region's unique resources to aggressively recruit jobs and private capital investment to the region. JAXUSA coordinates economic development efforts across a seven-county region that includes Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns counties.

Northeast Florida Regional Council

The Northeast Florida Regional Council (NEFRC) is the regional planning organization for seven Northeast Florida Counties (Baker, Clay, Duval, Flagler, Putnam, Nassau and St. Johns) and their 27 municipalities. The mission of the NEFRC is to celebrate the unique assets of Northeast Florida and to engage its people, businesses, governments and organizations. In 2009, NEFRC adopted a Comprehensive Economic Development Strategy (CEDS). Updated in 2012 and 2015, the CEDS buttresses other economic development efforts in the region through identifying programs and projects essential to the region's economic development objectives.

CareerSource Northeast Florida

CareerSource Northeast Florida is a publicly funded agency that provides extensive workforce-related services to six counties on Florida's First Coast – Baker, Clay, Duval, Nassau, Putnam, and St. Johns counties. CareerSource opens the door to improved employment opportunities through education, training, and career services for workers. CareerSource administers an annual budget of more than \$20 million.

Northeast Florida Residents & Businesses

Development of the Elevate Northeast Florida Strategy involved face-to-face discussions with private business leaders, representatives of philanthropic organizations, economic development professionals, and other civic champions. Additionally, more than 1,300 residents and business owners completed an online survey as part of the economic development strategic planning process.



Project Partners, continued

Avalanche Consulting, Inc.

Avalanche Consulting is the nation's premier economic development strategist. Avalanche is deeply driven to make a positive impact and seek clients who are equally inspired to energize their economies. Headquartered in Austin, Avalanche was established in 2005 and its team has a combined 80+ years of experience working with more than 150 cities, counties, and regions across the country.

Council for Adult and Experiential Learning (CAEL)

CAEL is a national, non-profit organization whose mission is to put meaningful learning, credentials and work within reach for every community. CAEL works to remove policy and organizational barriers to learning opportunities, identifies and disseminates effective practices, and delivers value-added services. Since its founding in 1974, CAEL has been providing colleges and universities, companies, economic development organizations, labor organizations and state and local governments with the tools and strategies they need for creating practical, effective lifelong learning solutions to address long term skills needs.



Steering Committee Members

The Elevate project partners and consulting team sincerely thank the members of Elevate Northeast Florida's Strategy Committee for helping inform and guide the development of this strategic plan. Members include:

Tony Allegretti, *Cultural Council of Greater Jacksonville*
 Katrina Austin, *Flagler County DEO*
 Dr. Perry Bechtel, *Mayo Clinic*
 Brian Bergen, *Putnam County EDC*
 The Honorable Aaron Bowman, *City of Jacksonville*
 Michelle Braun, *United Way of Northeast Florida*
 Debbie Buckland, *BB&T*
 Carolyn Clark, *Urban Land Institute*
 Josh Cockrell, *Infinity Global Solutions*
 Rena Coughlin, *Nonprofit Center*
 Steve Crosby, *InvestJAX*
 Jay Cunio, *JAA*
 Dr. Mark Dawkins, *University of North Florida*
 Laura DiBella, *Nassau County EDC*
 Lara Diettrich, *Diettrich Planning*
 Janice Donaldson, *Small Business Development Center*
 Kevin Doyle, *Wexford Strategies*
 Heather Duncan, *AT&T*
 Karen Everett, *St. Johns County Chamber of Commerce*
 Bruce Ferguson, *CareerSource Northeast Florida*
 Elizabeth Feustel, *Jacksonville Civic Council*
 Mike Fleming, *Jacksonville University*

Bill Garrison, *NEFBA*
 Melissa Glasgow, *St. Johns County*
 Jake Gordon, *Downtown Vision*
 Shelley Hirsch, *Nassau County Economic Development Board*
 Elaine Johnson, *Guidewell*
 Will Ketchum, *Burdette Ketchum*
 Robin King, *CareerSource Flagler Volusia*
 Jana Kooi, *FSCJ*
 Anna Lebesch, *St. Johns River State College*
 Julie Long, *St. Johns County*
 Eric Mann, *First Coast YMCA*
 Trina Medarev, *World Affairs Council*
 Jeanne Miller, *Jacksonville Civic Council*
 Sherri Mitchell, *Nassau County EDC*
 Katie Mitura, *Visit Jacksonville*
 Candace Moody, *CareerSource Northeast Florida*
 Alan Mosley, *Regional Transportation Commission*
 The Honorable Don O'Brien, *Flagler County*
 Mary O'Brien, *Keen LLC*
 Jeff Parsons, *AT&T*
 Laura Pavlus, *Clay County EDC*
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Trina Medarev, *World Affairs Council*
 Robert Peek, *JAXPORT*
 Jordan Pope, *JEA*
 Crawford Powell, *Baker County*
 Ed Randolph, *City of Jacksonville OED*
 Lake Ray, *FCMA*
 Darryl Register, *Baker County Chamber of Commerce*
 Bob Rhodes, *Attorney-At-Law*
 Jeff Sheffield, *North Florida TPO*
 Darnell Smith, *Florida Blue*
 Kelly Smith, *Wells Fargo*
 Jim Stallings, *Ps27 Ventures*
 Chereese Stewart, *Clay County*
 Crystal Stiles, *FPL*
 Brian Teeple, *Northeast Florida Regional Council*
 Brad Thoburn, *JTA*
 Helga van Eckert, *Flagler County DEO*
 Nina Waters, *Community Foundation*
 Kirk Wendland, *City of Jacksonville OED*



About This Report

This report, the first of four that will comprise the Elevate Northeast Florida Comprehensive Economic Development Strategy, provides a detailed, multifaceted evaluation of the current state of the region. The report begins with two sections of high-level synopsis and is followed by five sections of detailed quantitative and qualitative information.

Summary of Findings

The first section of this report, Context and Drivers, includes topline findings from the entire data analysis. It puts the research findings into context and illustrates emerging storylines that will start to influence the priorities of the Elevate Northeast Florida Strategy.

SWOT Analysis

Like Context and Drivers, the SWOT Analysis provides another format for sharing themes that evolved from Elevate Northeast Florida's to-date research. The SWOT melds quantitative analysis with stakeholder input to summarize the region's strengths, weaknesses, opportunities, and threats. The SWOT will inspire the final Strategy's recommendations and marketing messages.

Economic Evaluation, Demographic Characteristics, and Quality of Life Factors

The next three sections of the report provide readers with in-depth data on the region. For many variables, Northeast Florida's data is contrasted against the nation's, state's, and seven benchmark metro's (Atlanta, Charlotte, Indianapolis, Nashville, Raleigh, Tampa, and Virginia Beach). This section can serve as reference material for area leaders when discussing trends and making decisions. It provides a shared foundation of understanding on the current state of Northeast Florida's competitiveness.

(continued)



About This Report, continued

Survey Results

Between March and April 2018, Elevate Northeast Florida partners and consultants conducted a survey of residents across the region. More than 1,300 participants across all seven counties contributed their insights through the survey. Their perspectives on the region's strengths, challenges, and vision are an important element of the research process and will be referred to throughout the Strategy's development. It will help ensure that the Strategy aligns with the values of the community.

County Profiles

The report concludes with short profiles of each county in Northeast Florida. The profiles are identically formatted and include data on population, income, employment, educational attainment, commuting patterns, and industry concentrations. County leaders are invited to pull their profiles from this report and incorporate the findings into their own materials and presentations.

A Note on the Region's Geography

For this report, data is presented for the aggregated seven-county region whenever possible. This data is referred to as the "Northeast Florida region." Select datasets are only available for the Jacksonville Metropolitan Statistical Area (MSA) – which includes five of the seven counties in the region (Putnam and Flagler counties are not in the MSA). In these instances, the report refers to the "Jacksonville metro." Benchmark data is reported at the benchmark region's MSA level.

