MARCH 2023

NORTHEAST FLORIDA

Regional Economic Development Strategy

JAXUSA PARTNERSHIP

ACKNOWLEDGMENTS

PROJECT PARTNERS

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Equally important are the partners of Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns Counties who served as steering committee members, subject matter experts, and county liaisons during the planning process.

Without the support of JAXUSA Partnership investors, this work would not be possible. Many investors were active participants in the planning process and will be instrumental in plan implementation going forward.

A complete list of JAXUSA Partnership investors can be found in Appendix E.

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PROJECT FUNDERS

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 Partnership coordinates economic development efforts across a seven-county region that includes Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns.

The **Northeast Florida Regional Council** (NEFRC) is the regional planning organization (1 of 10 in the state of Florida) for Baker, Clay, Duval, Flagler, Nassau, Putnam, Nassau and St. Johns counties and their 25 municipalities. The mission of the NEFRC is to celebrate the unique assets of Northeast Florida and to engage its people, businesses, governments, and organizations.

The **Jacksonville Civic Council** (JCC) is a nonpartisan, nonprofit organization established in 2010 by a diverse group of business and civic leaders seeking to shape and define Jacksonville's future. JCC members deploy their collective resources to achieve the goal of creating a vibrant and sustainable future for Jacksonville and its people.

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. Connecting workers to jobs and businesses to the talent they need to thrive, CareerSource Northeast Florida provides innovative services that build a talent pipeline for the jobs of today and the future.

JEA is a not-for-profit, community-owned utility located in Jacksonville, Florida, dedicated to improving lives and building community. Created as the Jacksonville Electric Authority by the City of Jacksonville in 1967, JEA provides services including electric, water, and sewer to more than one million Northeast Florida residents.

The **Jacksonville Transportation Authority** is an independent state agency serving Duval County by providing safe, reliable, innovative, sustainable, and dignified mobility solutions and facilities. JTA has responsibilities across multiple transportation modes, including designing and constructing bridges and highways and providing a variety of mass transit services.

CONSULTING TEAM

TIP STRATEGIES

TIP Strategies, Inc., is a privately held Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm's core competencies are strategic planning for economic development, talent strategies, organizational development, resiliency planning, and equity initiatives.

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Ocean Pier (Flagler County)

CONTENTS

OVERVIEW 1
- INTRODUCTION 2
- PLAN FRAMEWORK 4
- CATALYTIC INITIATIVES 5

STRATEGIC ACTION PLAN 7
- THE FUTURE IS NOW 8

PLANNING CONTEXT 23
- APPROACH 24
- QUANTITATIVE ANALYSES 24
- QUALITATIVE ANALYSES 25
- ECONOMIC CONTEXT 26

APPENDICES 35
- APPENDIX A. SWOT ANALYSIS 36
- APPENDIX B. TARGET INDUSTRIES 41
- APPENDIX C. INNOVATION ECOSYSTEMS 42
- APPENDIX D. IMPACT 51
- APPENDIX E. JAXUSA PARTNERSHIP 2022 INVESTORS 52

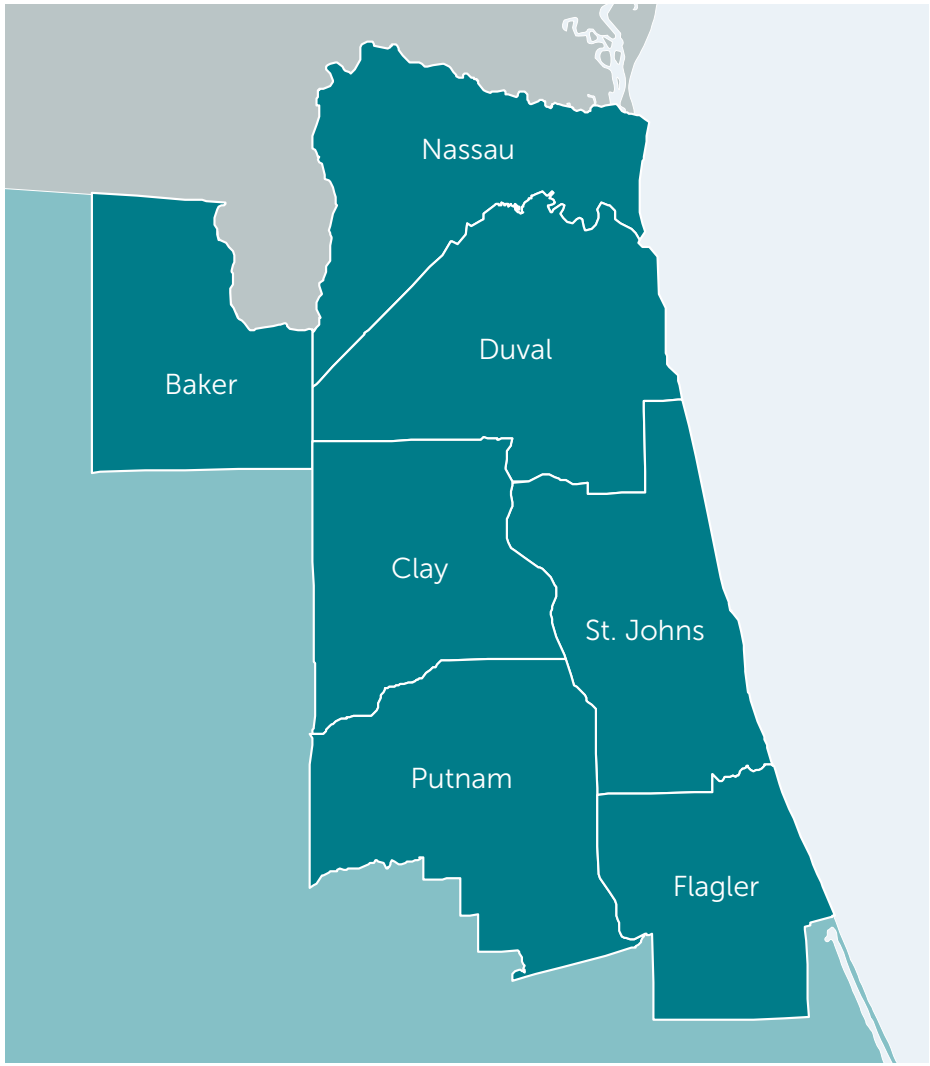
Intracoastal Waterway by Ketterman Photography courtesy of JAXUSA Partnership

INTRODUCTION

In spring 2022, JAXUSA Partnership launched its most ambitious regional economic development planning process to date. To ensure that economic mobility for everyone was at the core of the plan, the effort was also the most inclusive initiative the organization had ever conducted. Leadership from across Northeast Florida's seven counties (Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns) recognized that for economic development to be successful, it needed to represent the region as a whole. Furthermore, not all aspects of this plan will be driven by JAXUSA Partnership. It is imperative that the organizations and partners who assisted in the development of this plan serve as thought leaders and contributors throughout plan implementation. The result of this planning effort is a regional, people-centric economic development strategy. This focus acknowledges that talent is, and will continue to be, the primary driver of economic success for the region.

Talent unites the region. Northeast Florida offers residents a high quality of life with a wide range of amenities, including access to ocean beaches, inland waterways, and other outdoor recreational opportunities as well as options for rural and urban living. Over the past decade, population has increased significantly across the region (see Figure 4, page 27) as skilled talent from around the country is drawn to the seven-county region by its challenging, innovative jobs and vibrant communities. However, housing and infrastructure developments are not keeping pace with growth (see Figure 8, page 32). Investing in the region's quality of place—one of its most significant competitive advantages—must be a priority.

Investing in the workforce must also be at the top of the list. High-performing schools, from early childhood to postsecondary, are needed to prepare future leaders for the jobs of tomorrow. Although parts of the region have top-ranked schools and robust training programs, there are people and communities in Northeast Florida that have been left behind. Underinvestment in the systems that are needed to support economic development plague parts of the region and a lack of technical training and upskilling options have left workers stuck in low wage jobs. Engaging partners across the workforce development and education and training sectors will be essential to ensuring a pipeline of talent to meet the needs of employers.



Northeast Florida's success in attracting talent has contributed to a lack of housing supply, which is putting pressure on the market, increasing home prices, and threatening to displace residents. This situation has had a profound effect on the region's most vulnerable residents, including children, who face housing insecurity. As homeownership slips out of reach for residents, the opportunity for generational wealth building also becomes further away. Wealth building has a direct link to entrepreneurship and business capitalization, something that is much harder to achieve without the financial support from one's personal wealth or family and friends.

In addition to creating a diverse and skilled workforce, supporting entrepreneurship and business development, including business recruitment, is vital to the region's economic success. Northeast Florida has dynamic businesses and industries that serve clients around the world. The region's infrastructure, from interstates to ports to broadband, must not only meet the growth needs of existing businesses, but also the future industries that will call Northeast Florida home.

Despite these real challenges, the region can overcome these obstacles with a collaborative, coordinated approach. Regions that will be the most competitive in attracting and retaining top tier talent and businesses are those that work together to leverage one another's strengths. Every community approaches economic development based on its unique assets and opportunities, but there must be a recognition of the interconnectedness of the systems that unite the region. Economic developers are natural conveners, bringing together business and community leaders from across the region to address shared issues. Although this plan cannot address every economic challenge facing Northeast Florida, by leading with workforce from a regional perspective, it can position the region's residents and businesses for a more prosperous future.

Beach Sunrise (Duval County)

PLAN FRAMEWORK

The Future Is Now—Northeast Florida economic development strategic plan is anchored by a strong, regionally focused vision statement.

Northeast Florida invests in its diverse talent base and vibrant communities to create a thriving economy that embraces regionalism.

Meaningful vision statements set a bold course, provide clear direction, and differentiate the region from its peers and competitors. Although the strategic plan is designed to be implemented over a 5-year planning horizon, the vision statement sets the economic direction for the next 20 years. *The Future Is Now* plan speaks to the desire of regional leaders to prioritize economic opportunity and to align resources in support of economic mobility for all residents.

The plan's guiding principles are the unmeasured, qualitative roles and functions that intersect the primary areas of the strategic action plan. Each principle is forward looking and helps orient goals and strategies toward regional growth and improvement.

The vision statement and the guiding principles were crafted with input from a 30-member steering committee and regional leaders. They form the framework on which the strategic action plan goals were formulated. The plan goals, strategies, and actions emerged from an extensive planning process, which is described in the "Planning Context" section. In keeping with the vision statement and the intention set by the guiding principles, the plan will be implemented through the alignment of partners across Northeast Florida. An overview of *The Future Is Now* framework is provided as Figure 1 (page 5). A discussion of the metrics that will be used to measure impact can be found in Appendix D.

GUIDING PRINCIPLES

1 COMPETITIVENESS

Northeast Florida continues to maintain a high quality of life and favorable business environment that attracts and retains top-tier talent and businesses.

2 REGIONALISM

Northeast Florida communities work in coordination with all of their partners to leverage one another's strengths and capitalize on opportunities leading to greater economic prosperity for all.

3 ECONOMIC MOBILITY

Northeast Florida recognizes the region's unemployed, underemployed, and underserved populations face barriers to fully participating in and recognizing the benefits of a robust economy and will intentionally address these systemic issues.

4 INNOVATION

Northeast Florida engages entrepreneurs, business leaders, higher education, and economic development partners to create a dynamic environment that fuels cross-sector partnerships and leads to cutting-edge technology.

5 RESILIENCE

Northeast Florida is not only prepared to withstand economic shocks, but also to quickly recover from economic impacts through regional collaboration and coordination.

FIGURE 1. ECONOMIC DEVELOPMENT STRATEGIC PLAN FRAMEWORK

Source(s): TIP Strategies, Inc.

CATALYTIC INITIATIVES

Woven throughout the plan are several catalytic initiatives. When implemented, these large-scale projects have the potential to have a profound and transformative impact on Northeast Florida's economy. However, a coordinated regional approach and an intentional emphasis advancing economic opportunity will be required to ensure the catalytic initiatives reach their full potential.

In addition to a coordinated approach, these transformational projects will require public and private investments to come to fruition. With federal funding opportunities, such as the Creating Helpful Incentives to Produce Semiconductors (CHIPS) and Science Act of 2022 and the Inflation Reduction Act of 2022, there are millions of dollars available for regions to compete for. The strategies and actions in this plan position Northeast Florida to be competitive for funding opportunities by building a platform for regional collaboration, prioritizing workforce, and driving entrepreneurship and innovation.

The catalytic initiatives, which are described in Figure 2 (page 6), encompass five areas.

1. Focusing on workforce initiatives that drive growth and innovation.
2. Taking a regional approach to commercial and industrial site readiness.
3. Targeting crucial ecosystem development in key industries.
4. Creating vibrant and diverse downtowns for businesses, residents, and visitors.
5. Leveraging outdoor amenities to create economic growth.

All five of these initiatives have commonalities that tie back to the plan's guiding principles. As Northeast Florida leaders think about future land use development and where employment sites will be, they must also consider regional impacts, the location of future employees, and transportation needs for both goods and workers. Transportation is often cited as a barrier to employment. Future developments must ensure that residents

throughout Northeast Florida can safely and efficiently get to work. New developments and revitalization efforts must be cognizant of potential displacement of residents, and actions need to be taken to minimize impacts. Furthermore, major planning efforts must be inclusive and done in coordination with residents.

Workforce development will be one of the fundamental elements of building robust industry ecosystems, especially in underserved communities. These efforts should be driven in close partnerships with both K–12 and higher education as well as workforce development and career and technical education partners. In addition to training, increasing outreach for programs that support entrepreneurs and that drive cross-sector partnerships will move the region toward greater economic mobility. The region also strives to have a competitive advantage over peer communities to attract talent, businesses, and investment. When these initiatives are implemented, they will elevate quality of life for the region and solidify Northeast Florida as a premier location for economic investment.

FIGURE 2. CATALYTIC INITIATIVES

TALENT

Migration data demonstrates that the region is **connected by talent,** and talent remains one of the most **pressing concerns** for employers across Northeast Florida. **Workforce development investments** are needed to ensure economic prosperity for all as well as investments in **talent attraction and retention**.

EMPLOYMENT CENTERS

Northeast Florida has the opportunity to take a regional approach to planning for future employment centers to ensure **businesses are able to expand and relocate** in a timely manner as well as to ensure **transportation networks** align between residential and job centers.

INNOVATION NICHES

Innovation niches are the **targets of the future** and must be developed with a longer-term vision and a deeper investment commitment than traditional industry growth. **Significant regional investments** include physical infrastructure, educational programming, talent pipeline development, and cross-pollination of institutional relationships.

DOWNTOWNS

Vibrant and dynamic downtowns in every corner of Northeast Florida are essential to creating high quality of life that attracts business and talent. Investments are needed to invigorate central business districts and Main Street corridors, with a focus on **residential and commercial infill**.

OUTDOOR ECONOMY

Northeast Florida has incredible natural resources and outdoor assets that can be leveraged for **talent attraction and recruitment** and as a catalyst for **community development**.

Source(s): TIP Strategies, Inc.

STRATEGIC ACTION PLAN

Amelia Island (Nassau County) by Deremer Studios LLC

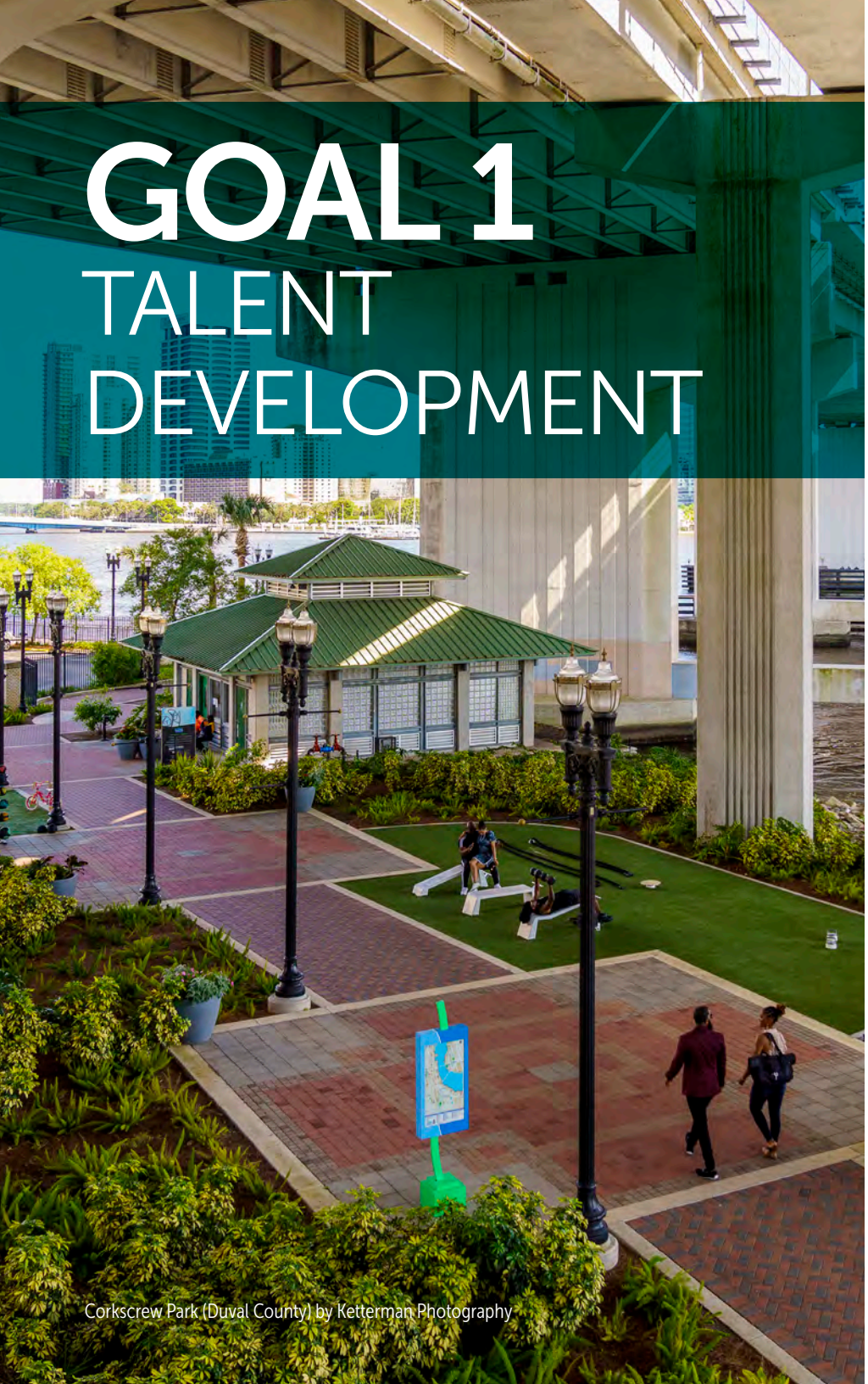
THE FUTURE IS NOW

This strategic action plan represents the culmination of a robust planning process and reflects an analysis of Northeast Florida's strengths, weaknesses, opportunities, and threats. (See Appendix A for an illustration of the SWOT Analysis findings.) The region is fortunate to have a strong network of economic developers, city and county leaders, and workforce and education partners who are dedicated to advancing the regional economy in collaboration with the private sector. Through this plan, Northeast Florida will improve its competitive positioning against peer markets to better attract talent, business, and investments that will continue to grow and diversify the economy. Economic development cannot be done in a silo, however. Accomplishing these goals will require new and deeper coordination and cooperation on a regional level.

The goals and strategies outlined in the action plan reflect the region's five guiding principles: competitiveness, regionalism, economic mobility, innovation, and resilience. The guiding principles serve as a reminder of the most important values that regional stakeholders identified during the planning process to constitute a successful plan. Although there is work to be done to move the region to the next level, which will require new initiatives to advance the economy, there must be an acknowledgment of the tremendous work that has already been accomplished. In recognition of this fact, the plan includes strategies and actions that have proven successful and must be continued across the region. There are also strategies and actions that exist in parts of Northeast Florida, but which should be scaled up to benefit the entire region. The action plan also includes new initiatives that will strengthen the regional economy and foster new partnerships.

Skimboard Rider (St. Johns County) courtesy of Florida's Historic Coast

GOAL 1
TALENT DEVELOPMENT



Corkscrew Park (Duval County) by Ketterman Photography

Promote the development of accessible career pathways that create a robust talent pipeline reflective of employer needs.

In today's competitive landscape, Northeast Florida's diverse and dynamic workforce is a distinct advantage. Business leaders seek inclusive regions where diversity is seen as an asset that cultivates creative thinking, honors different perspectives, and fuels growth. Although this diversity is an advantage from the outside, a closer look at the data makes it clear that the region's underserved populations continue to lag in developing the technical skills required for the high wage jobs economic developers strive to attract. Therefore, workforce development investments that ensure employers have the talent they need to grow and that residents from all backgrounds have the ability to thrive are essential to the region's future competitiveness. Strategies under this goal include an intentional emphasis on the initiatives that offer all residents the opportunity to gain the skills and training needed to access the region's high-quality jobs. Actions include approaching career exploration from a partnership model; deepening relationships across industry, education, and workforce development partners; and investing in talent attraction programs to bring top talent to Northeast Florida. The region benefits from its network of state colleges and universities that not only draw talent to the area, but also prepare the local workforce for existing jobs. The outcome of these initiatives should result in stronger collaboration and coordination among public and private sector leaders to ensure a robust and diverse pipeline of skilled talent.

STRATEGIES AND ACTIONS

1.1 Grow career exploration and training programs that expose youth and adults to job opportunities across Northeast Florida.

1.1.1. Build regional awareness of the Earn Up program through enhanced outreach to economic development partners, private sector leaders, and elected officials.

1.1.2. Refine the Earn Up target sectors to align with the update outlined in Appendix B (see Action 2.3.1).

1.1.3. Leverage workforce programs for transitioning adults, such as veterans' reentry programs, to ensure regional talent is retained in Northeast Florida and to better position smaller companies to attract skilled workers.

1.1.4. Work with employers to expand their applicant pool and rethink current hiring practices to provide greater opportunities for job seekers across diverse backgrounds.

1.1.5. Support on-the-job-training and incumbent worker upskilling to develop long-term career pathways. Emphasize cross-training in critical operations to build resilient teams and businesses.

1.1.6. Foster the development of internship and apprenticeship programs through public and private sector partnerships.

1.1.7. Support Northeast Florida's retired and near-retiring populations with continued education and upskilling programs and leverage their expertise as potential investors (see Action 2.1.2).

1.2 Deepen partner engagement across workforce and talent development initiatives to ensure talent is retained in Northeast Florida.

1.2.1. Host sector-specific events to build awareness about the depth and breadth of Northeast Florida's employers.

1.2.2. Bolster K–12 career exposure programs regionwide, especially in historically underserved communities, to ensure students are aware of the career opportunities and variety of industries in Northeast Florida.

1.2.3. Develop programs that also expose parents, guardians, and caregivers to these opportunities, including occupations in the trades and tech-based careers.

1.2.4. Expand college graduate retention programs and partner with local colleges and universities to track post-graduation outcomes.

1.2.5. Expand and develop in-demand career and technical education (CTE) programs in partnership with public and private sector leaders. Build awareness of career opportunities in the trades, especially in underserved populations.

1.2.6. Prioritize transit accessibility between employment centers and residential developments.

1.3 Prioritize the workforce support ecosystem through collaborative partnerships.

1.3.1. Evolve the Talent Advancement Network (TAN) to focus on specific initiatives to grow the talent pool in Northeast Florida.

1.3.2. Continue to evolve initiatives that promote professional growth and talent retention.

1.3.3. Support the expansion of childcare programs and facilities to support working families.

1.3.4. Develop talent in early childhood education to ensure a strong workforce pipeline.

1.3.5. Ensure strong collaboration and engagement with postsecondary partners to build relationships among the private sector and higher education.

1.3.6. Align programs for opportunity populations with promising career pathways.

1.4 Bolster talent attraction and marketing initiatives to grow a diverse pool of top-tier talent.

1.4.1. Elevate the Find Your JAX program to include information on neighborhoods, social networks, and regional events.

- Regularly feature events or organizations to draw an audience back to the site for new information.

1.4.2. Create an inclusive influencer networking program comprised of diverse professionals across industries and occupations to highlight Northeast Florida's assets.

1.4.3. Target diverse Millennial and Generation Z CEOs, entrepreneurs, and remote workers in the region's target industries (see Appendix B) to bring growing companies to Northeast Florida and deepen the region's talent pool.

- Leverage existing programs such as JAX Bridges to demonstrate the infrastructure and systems in place to support entrepreneurs.

1.4.4. Engage the diverse voices of young professionals to understand the needs and goals of the region's future leaders.

- Leverage existing organizations and meetings to share economic development news and collect feedback on opportunities.

Remote Work Brewhound Dog Park + Bar (Duval County) by Ketterman Photography

GOAL 2
BUSINESS GROWTH

Downtown Jacksonville (Duval County) by Ketterman Photography

Attract, retain, and grow businesses while cultivating an inclusive, supportive ecosystem for innovation and entrepreneurship.

Growing the Northeast Florida regional economy through business retention, expansion, and recruitment is a crucial element of the action plan and should include support for small businesses and startups. Northeast Florida has a storied economic history, with humble beginnings as a predominantly agricultural-based economy and a strategic geographic location ideally suited for military operations. These two industries paved the way for a diverse portfolio of supporting businesses and have spurred innovation in other sectors. Today the region is home to global companies, including Boston Whaler, Comarco Products, FlexCold, Boeing, Forcura, Niagara Bottling, Northrop Grumman, Johnson & Johnson Vision, and Dun & Bradstreet. Fast growing startups, like TriageLogic and Urban SDK, choose to remain in Northeast Florida for its skilled talent, supportive business environment, and high quality of life.

Like each of the four goals, the strategies and actions aimed at business growth incorporate the plan's guiding principles to ensure alignment with regional values and drive deliberate investments. As the region continues to recover from the impacts of the ongoing COVID-19 pandemic, it will be imperative to take a strategic approach to business development. From supporting the region's targeted industry sectors and innovation niches to increasing the number of visits to minority business enterprises (MBEs),[1] business growth is essential to regional growth. The innovation niches represent specialized areas where Northeast Florida has a strategic advantage. These target sectors of the future can facilitate the region's economic diversification and help create a more resilient economy. For these niches to grow, an intentional ecosystem development strategy must be put in place that engages cross-sector public and private partners. Actions that support ecosystem development are also essential components of successful business

1 The terminology used throughout the plan aligns with the Florida State Minority Supplier Development Council.

retention and expansion (BRE) programs because they have been proven to create a strong foundation for economic development. This plan will require economic development leaders to reach beyond those core actions to forge new relationships and drive investment in bold initiatives.

STRATEGIES AND ACTIONS

2.1 Make critical investments to support startups and entrepreneurs, a segment which often represents the future of a regional economy.

2.1.1. Map Northeast Florida's entrepreneurial assets and resources to identify any gaps or areas of opportunities for additional support and program development.

- Ensure this work is future focused and acknowledges the changing landscape that will impact entrepreneurs, from financial funding models to digital assets.

2.1.2. Cultivate entrepreneur networks through enhanced programming, including formal and informal meetups about topics such as funding mechanisms (including private equity), business planning, client development, and scaling (see Action 1.1.7).

- Leverage the Open Innovation Center to convene and grow cross-sector partnerships.

2.1.3. Grow incubator and accelerator programs across Northeast Florida in conjunction with higher education, including centers of excellence concentrated on growing the region's niche and innovation areas.

2.1.4. Support the Calls to Innovate initiative to build connections among entrepreneurs and Northeast Florida's legacy industries and encourage cross-sector partnerships.

2.1.5. Partner with the region's higher education institutions to grow tech transfer, facilitate research commercialization, and foster industry innovation in the region's targeted sectors.

JACKSONVILLE SMALL AND EMERGING BUSINESS (JSEB)

The JSEB program is an initiative spearheaded by the City of Jacksonville's Equal Business Opportunity (EBO) Office open to businesses in Duval County. Business vendors certified through the JSEB program are eligible to bid on prime and subcontracting opportunities with public agencies. The EBO Office, in coordination with partners, also leads workshops, hosts a procurement summit, and offers mentorship programs to support JSEB businesses seeking procurement opportunities.

2.2 Drive business growth, retention, and expansion efforts throughout Northeast Florida.

2.2.1. Increase the number of annual business visits, with an emphasis on businesses in the region's target sectors, innovation niches, and MBEs.

2.2.2. Convene regional economic development professionals consistently to understand regional challenges and build on the opportunities.

- Ensure meetings are engaging and purpose driven, with a focus on advancing the strategic plan, sharing regional best practices, and providing updates on economic development activities.
- Convene meetings in different counties throughout Northeast Florida to build exposure of regional assets.

2.2.3. Assist companies with export plans to increase international exports and develop new markets in coordination with regional partners, such as the Florida Small Business Development Center at the University of North Florida, Enterprise Florida, and US Commercial Service Jacksonville.

2.2.4. Build the region's target sector supply chain through specialized industry research aimed at deepening knowledge on emerging technology and understanding industry needs.

2.2.5. Provide support to small and emerging businesses seeking procurement contracts with public agencies.

- Consider procurement audits to understand potential roadblocks to contracting, especially for women-owned businesses and MBEs.

MICHIGAN OPPORTUNITY PODCAST

The Michigan Opportunity is a podcast series created and developed by the Michigan Economic Development Corporation to promote Michigan as an ideal business location. Episodes feature business leaders from across the state profiling their business and highlighting why they choose to grow in Michigan as well as economic development leaders sharing stories about innovation and opportunities in their communities. Episodes often link to form a series to dive deeper into a particular industry, such as outdoor recreation, which included two episodes featuring outdoor equipment manufacturers and a third episode on the Michigan Office of Outdoor Recreation Industry. The podcast not only builds awareness about the business and entrepreneurship ecosystem across Michigan, but also amplifies stories to a national audience of site selectors and business leaders.

2.3 Implement a regionally collaborative and coordinated approach to target sector development to grow future niche industries in Northeast Florida.

2.3.1. Refine JAXUSA Partnership's target sectors to align with the update outlined in Appendix B (see Action 1.1.2).

2.3.2. Develop the target sector ecosystem, including niche innovation areas, through cross-sector collaboration aimed at building out support systems for each sector (see Appendix C for ecosystem diagrams for each niche area identified).

2.3.3. Maintain up-to-date regional marketing materials for the target sectors highlighting the value proposition for Northeast Florida.

2.3.4. Build relationships with media and press to share local business success stories not only in Northeast Florida, but also nationally.

2.4 Support the growth and vitality of small businesses across Northeast Florida.

2.4.1. Focus on connecting businesses with the technical assistance they need to grow and expand their operations.

2.4.2. Develop initiatives to cross-train employees in critical business operations and offer continuity planning to build resilience.

2.4.3. Grow the Small Business Equity Fund across the region to support more businesses in Northeast Florida.

2.4.4. Expand the economic development influence of higher education through enhanced partnerships and regular convenings.

2.4.5. Scale the JAX Bridges program to support more businesses across Northeast Florida.

2.5 Recruit new companies to Northeast Florida that offer high-quality jobs and are invested in the future of the region.

2.5.1. Deepen relationships with site consultants across the country, especially those that specialize in Northeast Florida's target industries.

- Conduct virtual and in-person familiarization tours to bring consultants into Northeast Florida as well as conduct outbound sales trips to meet with consultants and prospects in other markets.

2.5.2. Leverage the region's existing business leaders for recruitment leads, especially for key suppliers and customers who are located outside of the region.

- Take local businesses leaders on business development trips and site selector visits to offer a firsthand experience of doing business in Northeast Florida.

2.5.3. Grow foreign direct investment through prospecting and international trade missions to bring exposure to Northeast Florida's favorable business climate and quality of life.

- Ensure regional partners are included in trade missions. If partners are unable attend, conduct pre-meetings (to learn about opportunities to promote and gather marketing materials prior to the mission) and debriefs (to disseminate relevant information gained during the mission).

2.5.4. Attend relevant industry events to identify new prospects and build awareness about opportunities in Northeast Florida.

2.5.5. Respond to business recruitment and retention leads with creative incentives that demonstrate the community is committed to long-term partnerships with local businesses.

BANFIELD PET HOSPITAL CORPORATE HEADQUARTERS

Washington State is consistently absent from discussions of competitive state incentives packages, yet it continues to be a highly sought after market for new businesses, due to its high quality of life and ability to attract talent. Economic developers, especially those in communities that border surrounding states, have long sought creative incentives and programs that truly resonate with prospects. In 2014, Mars, Incorporated announced it would be relocating the corporate headquarters of Banfield Pet Hospital from Portland, Oregon, to Vancouver, Washington. Although the state was only able to offer $200,000 in incentives for the $75 million project, which was projected to employ over 600 high wage workers, the city of Vancouver was able to waive some of the local impact and development fees. The incentive with the most impact, however, was the city's willingness to turn one-half acre of land adjacent to the campus into a public dog park that could be utilized by Banfield's employees, as employees regularly bring their dogs to work. Banfield worked with the city's Parks, Recreation & Cultural Services to ensure the design would be beneficial for the community as well. Banfield's senior manager for the development was quoted as seeing the dog park as the "jewel of the campus."

Downtown Fernandina Beach, Nassau County

GOAL 3
QUALITY OF PLACE

Fleming Island (Clay County)

Elevate quality-of-place projects that spur investment and create a desirable location for businesses and talent.

Developing a high quality of place that attracts and retains successful businesses and top talent has become an increasingly important focus of successful economic development organizations. Northeast Florida communities are fortunate that people are attracted to the lifestyle and opportunities the region presents. In 2021, the seven-county region had the largest number of domestic inbound migrants in any year over the past two decades. This robust in migration comes with both benefits and challenges. On the positive side, leveraging growth and building on the momentum it creates will drive new revenue that can be invested to maintain the region's quality of place. On the negative side, growth can strain existing resources and create pressure on amenities and services.

This goal encompasses everything from supporting quality schools—which in turn produces quality talent—to promoting downtowns and activating public spaces. Investments in rural infrastructure, including in broadband technology and in small town main streets, are as needed as investments in downtown Jacksonville. For the Northeast Florida region to be competitive, all of its communities need to be vibrant and offer diverse amenities for businesses and residents. Housing also remains a concern for nearly every community in the region. The COVID-19 pandemic is putting unprecedented demand on the housing supply, with new migrants seeking the region's desirable climate. This increased demand, coupled with inflation and rising interest rates, has put homebuying out of reach for many. Preparing residents for homeownership and building pathways to homeownership are effective ways to build generational wealth across all income levels and racial/ethnic groups. Creating attainable workforce housing throughout the region, including multifamily units in rural and urban communities, should remain a top priority going forward.

STRATEGIES AND ACTIONS

3.1 Invest in Northeast Florida's downtowns and central business districts to spur investment and development, including downtown Jacksonville.

3.1.1. Prioritize urban infill projects to activate underutilized sites and focus on transportation-oriented developments (see Action 4.2.2).

3.1.2. Expand storefront beautification programs that enhance downtowns and drive residents and tourists to shop locally.

3.1.3. Attract amenities to the region's downtowns, including communal gathering spaces, restaurants, and arts and cultural offerings.

3.1.4. Launch Complete Streets initiatives,[2] especially in underserved areas, to enhance quality of life and spur private sector investments.

3.1.5. Encourage Wi-Fi nodes in downtowns to activate public spaces for residents and tourists (see Action 4.1.2).

3.2 Expand the number of housing units across Northeast Florida to meet the region's growth patterns.

3.2.1. Support regional partners in increasing the number of housing units, including affordable and workforce options, especially in downtown corridors.

3.2.2. Support housing developments near significant employment centers across the region to ensure spatial alignment between residential and commercial developments.

3.2.3. Encourage the development of attainable and diversified housing stock.

3.2.4. Build pathways to homeownership, especially for first-time homebuyers, as a way to grow generational wealth.

3.2.5. Adopt anti-displacement policies to ensure residents can remain in their homes even as private sector investments increase.

3.2.6. Support ongoing efforts by local communities and nonprofits to meet the needs of the region's population who are unhoused and factor these groups into conversations about housing production.

3.3 Maintain an authentic sense of community identity as new development and investment occurs.

3.3.1. Activate inclusive public spaces with diverse offerings where residents and tourists feel welcome.

3.3.2. Build the region's outdoor economy by increasing awareness of regional tourism assets, especially those off the coast and along the St. Johns River.

3.3.3. Develop the region's creative, arts, and cultural economy by launching a cultural asset inventory using resources such as the Arts & Planning Toolkit and the Southern Methodist University Arts Vibrancy Index.

3.3.4. Ensure a coordinated, regional marketing narrative to drive investment in Northeast Florida by forming a marketing committee comprised of public and private sector partners to provide input on materials and distribution channels.

3.3.5. Support local retailers in driving business growth and promoting shop-local programs.

3.4 Invest in connectivity infrastructure and systems to support the regional economy and its residents.

3.4.1. Increase waterfront access and activities along the coast as well as inland water systems.

3.4.2. Connect areas of interest by extending regional trail systems across county lines, not only for recreational use, but also for commuter access.

2 "Complete Streets." US Department of Transportation.

3.4.3. Develop the ecosystem needed to support remote workers, including suburban and rural areas, from investments in broadband to social and community networking (see Action 4.4.1).

3.4.4. Support the development and growth of inland and small ports throughout the region.

3.4.5. Expand Blue Zones recommendations regionally to take a holistic approach to well-being by creating connections at the neighborhood level between where people live, work, learn, and play.

DOWNTOWN PITTSBURGH, PENNSYLVANIA

In response to the city's last place ranking in a 2010 analysis of college graduate retention rates, local leaders launched ImaginePittsburgh. The initiative sought to create stronger connections between students and the community, raise awareness of local employment opportunities, and provide a counterbalance to on-campus recruitment activity by high-tech employers from New York City and San Francisco. By demonstrating what the city had to offer through mentorship and internship programs, civic engagement opportunities, company tours, and events ranging from happy hours to professional sports games, Pittsburgh was able to dramatically improve its performance on this key indicator. As a result, ImaginePittsburgh evolved into a broad-based regional initiative, Next is Now, which targets experienced talent to fill mid-level and executive positions. The Next is Now site provides information on regional industries, highlights local assets, and features a talent toolkit complete with a PowerPoint pitch deck showcasing the region. Through these efforts and robust investments in residential development, including office-to-residential conversions and affordable workforce housing, the city has experienced a transformation, particularly in its downtown. The Pittsburgh Downtown Partnership, the management entity for the city's downtown improvement district, has documented this change, including a dramatic increase in the number of people living downtown, via its State of Downtown Pittsburgh snapshot reports and an interactive Downtown Activity Dashboard.

Spring Park (Clay County)

GOAL 4
INFRASTRUCTURE NETWORKS

Downtown Jacksonville (Duval County) by Ketterman Photography

Prioritize place-based real estate development projects that spur investment and position the region as a preferred location for businesses and residents.

Ensuring the presence of robust and resilient infrastructure systems, from the electric grid to transportation, is essential to maintaining and growing a competitive environment. In late 2022, the Governor's Office awarded Jacksonville $5.5 million in state infrastructure funding for a rail spur at Cecil Commerce Center to support Northeast Florida's growing manufacturing and logistics industry. Although this grant only represents a fraction of the state and local infrastructure investments the region has made over the past decade, it signals the importance of targeted funding to support the growth of jobs and industry in the region. Additional funding allocations from the American Rescue Plan Act brought in much-needed federal dollars to support projects in rural parts of Northeast Florida, such as Baker County, where funding is being used to build out broadband to support businesses and residents.

Business leaders want to invest in regions that can not only meet their existing needs, but also are future focused and prepared to meet their growth needs. The First Coast Expressway project will activate new sites on a major transportation corridor creating new development opportunities. The JAXPORT currently has a $370 million public-private project underway to modernize infrastructure and reduce emissions in cargo handling as part of its efforts "to build the port of the future and move cargo in the most efficient and eco-friendly way possible."[3] Infrastructure investments must also be intentional, as communities that do not receive support are less desirable to investors and perpetuate the cycle of disinvestment. Adequate utility capacity, including water and sewer systems, are needed to support commercial and industrial developments that provide high quality and family

3 Dan Macdonald. "JaxPort Received $23.5 Million Federal Grant for Conversion Investments." *Jacksonville Daily Record.* October 31, 2011. .

wage jobs. Lastly, the region must prepare itself for future growth if it wants to remain competitive in business and talent attraction. Ensuring a long-term supply of development-ready sites and streamlining permitting processes to move projects forward efficiently will position the region favorably for federal funding and private investment.

STRATEGIES AND ACTIONS

4.1 Identify and focus development on commercial and residential corridors that link communities across Northeast Florida.

4.1.1. Modernize infrastructure systems needed to support investment and spur economic development, especially water and sewer lines and facilities.

4.1.2. Encourage Wi-Fi nodes in downtowns to activate public spaces for residents and tourists (see Action 3.1.5).

4.1.3. Deploy community-based financing programs that bolster private sector businesses as well as public sector investments that support business investment.

4.2 Ensure a long-term supply of commercial and industrial employment ready sites across Northeast Florida.

4.2.1. Create a regional inventory of significant commercial and industrial sites, tiered by development readiness, to understand long-term supply and infrastructure investment needs.

4.2.2. Encourage residential and commercial infill development by creating a plan for vacant and underutilized properties (see Action 3.1.1).

4.2.3. Form community land trusts and support land banking initiatives that ensure a long-term supply of industrial and residential development sites.

4.3 Proactively address permitting processes across the region to ensure sites and projects can be moved forward at a competitive pace.

4.3.1. Support partners with regionally significant sites to ensure parcels are pre-permitted (when possible).

- Highlight regional permitting best practices with community partners so leaders across Northeast Florida can learn from one another.

4.3.2. Act regionally, where possible, to improve permitting processes and streamline applications, including through the use of electronic review systems.

4.3.3. Advocate for liaisons within permitting departments who can assist applicants with permitting processes.

4.3.4. Encourage pre-permitting support, including pre-application meetings, to ensure all paperwork is submitted correctly and in its entirety.

4.4 Approach connectivity from a holistic and regional perspective that includes the movement of information as well as the physical mobility of freight and commuters.

4.4.1. Ensure reliable broadband service and delivery across Northeast Florida by taking a regional perspective on the planning and expansion of this critical infrastructure (see Action 3.4.3).

4.4.2. Expand public transit networks, including non-motorized routes, for commuter and recreational uses.

4.4.3. Continue to invest in interstate and highway transit systems needed to support freight and labor force mobility.

4.4.4. Prioritize sustainable and resilient infrastructure that can withstand environmental impacts and limit the disruption of critical systems for businesses and residents.

4.4.5. Form a public-private air service committee dedicated to building support for new nonstop domestic and international passenger and freight routes from Jacksonville International Airport (JAX).

PORTLAND INTERNATIONAL AIRPORT (PDX)

PDX is one of the busiest mid-size airports in the US with over 60 nonstop flights. It has also been routinely voted one of the nation's top airports by reader polls. In the early 2000s, after suffering losses of major international routes, the International Air Service Committee was formed with public and private members across the Portland metropolitan region committed to growing new routes for PDX. The recruitment and retention activities with which the committee was tasked represent a regional cross-sector effort demonstrating to air carriers that international service to PDX would provide a strong market opportunity. Specific results from the committee's efforts include creating a risk mitigation strategy for the Port of Portland; securing pledges of corporate support to use the nonstop international service; and obtaining marketing support from Travel Oregon, Travel Portland, and the Port of Portland. Since 2003, the committee is credited with adding 13 nonstop international routes, including a freight route, to support business and tourism growth in the region. The committee is dedicated to the recruitment and subsequent retention of these services, and continues to work closely with regional partners, as well as the carriers themselves, to sustain these international flights over the long term.

Jacksonville International Airport by Ken Lund via Flickr (CC BY_SA 2.0)

Hammock Beach Resort (Flagler County)

PLANNING CONTEXT

APPROACH

To provide a common framework for the planning process and the resulting action plan, TIP examined the policies, relationships, and priorities influencing economic development in the seven counties of Northeast Florida. This examination included a review of relevant background documents, including previous economic studies, county strategic plans, and regional resilience plans, in order to build on existing knowledge and align the new plan with current initiatives and programs. Findings from the quantitative and qualitative research, a thorough engagement process (see Figure 3, page 25), and TIP's 28 years of experience, ultimately influenced the goals and strategies included in the strategic action plan.

QUANTITATIVE ANALYSES

In addition to reviewing background material to gain an understanding of the regional economic development landscape, the TIP team conducted a number of comprehensive quantitative analyses. These analyses, which were delivered separately as interactive data visualizations, are described here.

- The *Northeast Florida Economic Explorer* is a broad-based economic and demographic analysis designed to gauge the region's relative economic position and highlight its competitive advantages and disadvantages. To understand the region's competitive position relative to peer communities, the Jacksonville federal metropolitan statistical area (MSA) was benchmarked against statistically comparable MSAs. Local competitive factors, such as air passenger connectivity, broadband access, and work from home metrics, were also reviewed. Where possible, demographic and labor data were disaggregated by ethnicity and race to understand any nuances in the data for historically underrepresented populations. Highlights from this economic analysis are presented in this section beginning on page 26.
- Following the economic context work, an analysis was conducted of the local and global factors impacting market and economic growth opportunities for Northeast Florida. The analysis resulted in some minor refinements of the target industry clusters laid out in the 2018 *Elevate Northeast Florida* strategic plan, which are discussed in Appendix B. From there, specific niches of innovative opportunity were identified and analyzed. The *Northeast Florida Industry Niches and Global Investment Trends* analysis consisted of three parts: an employment overview, a talent profile, and global investment trends. Understanding recent investments and expansions, including venture transactions and capital investors, shows patterns where emerging opportunities are within the region's emerging and high-growth industries. At the local level, an assessment of the risk and opportunity landscape for Northeast Florida's existing clusters can help position economic development leaders to react to acute sector needs for talent and capital.
- Drawing on the findings from the economic context work and the industry trends analysis, the *Northeast Florida Talent and Workforce Development* analysis was conducted to examine how the regional talent pipeline aligns with the needs of current and potential employers. A variety of public and proprietary data sources were used to profile relevant characteristics of the regional laborshed, including all component counties of the Jacksonville MSA. Talent migration patterns were examined to understand the full picture of worker relocations into and out of the region by educational attainment as well as a review of commuter patterns to understand the local laborshed. Lastly, an analysis of real-time job postings in key sectors provided insights about the skills and positions currently in demand by employers as well as wages and certification requirements.

QUALITATIVE ANALYSES

The data work was supplemented by a comprehensive and inclusive stakeholder engagement effort. A custom input process was designed specifically to meet the needs of Northeast Florida, including community tours and roundtable sessions. TIP worked with regional partners to identify leaders to participate in interviews and focus groups, resulting in input from over 200 individuals, including those who have not traditionally been engaged in the economic development strategic planning process. An illustration of the stakeholder engagement process is provided as Figure 3.

The quantitative work plus the feedback gathered in extensive discussions with stakeholders culminated in a summary of the region's strengths, weaknesses, opportunities, and threats, more commonly referred to as a SWOT analysis. An illustration of the SWOT Analysis findings is located in Appendix A.

Building on the assessment of workforce availability and capital flows laid out in the *JAXUSA Partnership Industry Niches and Global Investment Trends*, a deeper dive was conducted into the local "soft factors" that underpin the region's potential. An innovation analysis mapped the elements of the region's innovation ecosystem by each niche industry area. Elements of this analysis included: (1) anchor institutions supporting the industry, such as universities, hospitals, schools, and major employers; (2) competitions and events, which fuel network growth and attract industry participants from across the country; (3) local capital programs, to understand where funding opportunities are and where gaps exist; (4) emerging participants, who are the entrepreneurs and startups that have the potential to change the trajectory of the industry for the region; (5) building blocks, which are defined as a cross-sector support and collaboration system, such as incubators; and (6) public awareness, to bring attention to businesses and people to foster growth. Innovation ecosystem diagrams for each niche are presented in Appendix C.

FIGURE 3. STAKEHOLDER ENGAGEMENT OVERVIEW

COMMUNITY CONNECTIONS

7 County Tours

- Baker County
- Clay County
- Duval County
- Flagler County
- Nassau County
- Putnam County
- St. Johns County

17+ Individual Interviews

- Business and Industry
- Community Leaders
- Non-profit Partners
- Higher Education
- Public Sector
- Hispanic/Latino Chamber

30 Steering Committee Members

4 Steering Committee Meetings

2 Planning Workshops

ROUNDTABLES

18 Roundtable Sessions

215+ Roundtable Participants

- Higher Education and Workforce
- Nonprofits and Foundations
- Industry and Large Employers
- Entrepreneurs and Start-Ups
- Students and Young Professionals
- Real Estate and Development
- Ministers and Community Leaders
- Regional County Stakeholders
- Marketing and Talent Recruitment
- Civic Organizations

Source(s): TIP Strategies, Inc.

ECONOMIC CONTEXT

As part of the strategic planning process, TIP conducted a targeted assessment of factors that define Northeast Florida's overall competitiveness, including demographic, industry, and occupational trends. The analysis was completed as part of TIP's discovery phase. Initial data collection began in July 2022 and the work extended for the next four months. An in-depth analysis was delivered to the JAXUSA Partnership in an interactive data visualization. Key findings of this analysis, summarized in this section, informed and guided the direction of the strategic plan.

From fast to faster, Northeast Florida's population growth has accelerated.

In late December 2022, months after the work for this analysis had been completed, the US Census Bureau made an announcement. For the 12-month period ending the previous June, the state of Florida's population led the nation in *percentage* growth for the first time since 1957.[4] For a state as populous as Florida, to be a percentage growth leader is an extraordinary achievement, and it further underscores a finding that had already emerged in the discovery phase of this project. In the past few years, the Northeast Florida region has begun to pull away from the rest of Florida in population growth. The state of Florida is nearly two-thirds larger than it was three decades ago, but Northeast Florida, by comparison, is nearly three-quarters larger than its 1990 population footprint. With this trajectory in mind, the region must continue to invest in the infrastructure needed to support economic growth.

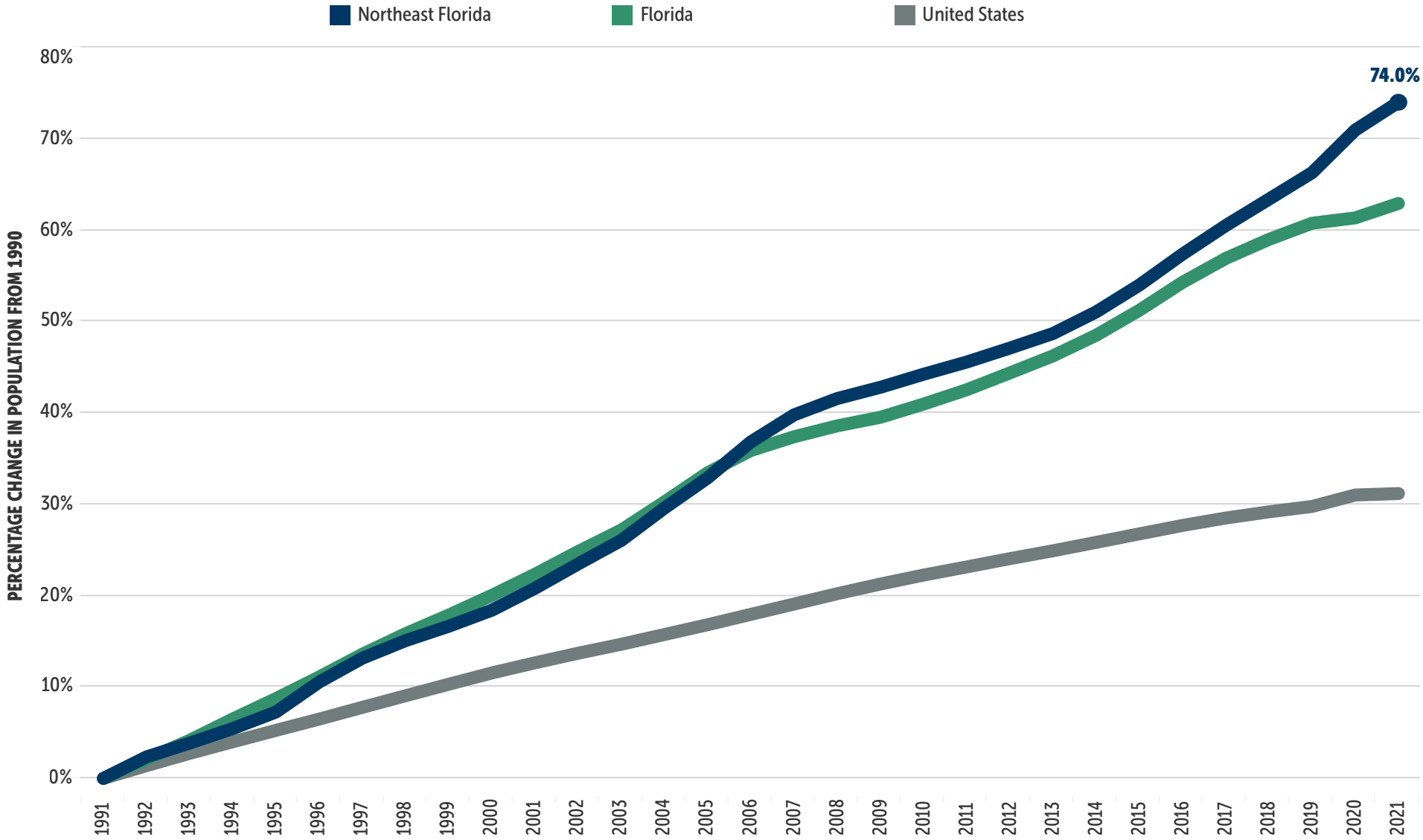
Occupational structure is a predictor of work-from-home rates.

The COVID-19 pandemic has elevated remote work to a subject of debate from boardrooms to living rooms. To be sure, daily commuting patterns for many office workers are shifting during the pandemic, and while most workers are returning to the office, the frequency of their visits is less likely to be five days a week. How these patterns ultimately impact office real estate and downtown foot traffic may take years to sort out. For now, it is evident that (1) work-from-home rates rose in 2020 at the height of the pandemic, and (2) occupational patterns differ widely across US cities. Metropolitan areas with the most tech-heavy economies tend to have more office-using employment, and these are the cities where work-from-home rates were highest during the pandemic. Cities with more industrial or traditional economic structures have fewer office-using jobs overall, so work-from-home rates in these cities tend to be lower. This is why Austin and Raleigh lie at a different end of this spectrum than Memphis and Birmingham in Figure 5 (page 28). Northeast Florida's work-from-home rates fall squarely in the middle of this band. In order to continue to attract and support talent working from home, the region must invest in broadband and telecommunications technology, especially in rural and underserved areas.

4 "Growth in US Population Shows Early Indication of Recovery Amid COVID-19 Pandemic." US Census Bureau. Press Release Number CB22-214. December 22, 2022.

FIGURE 4. POPULATION GROWTH SINCE 1990

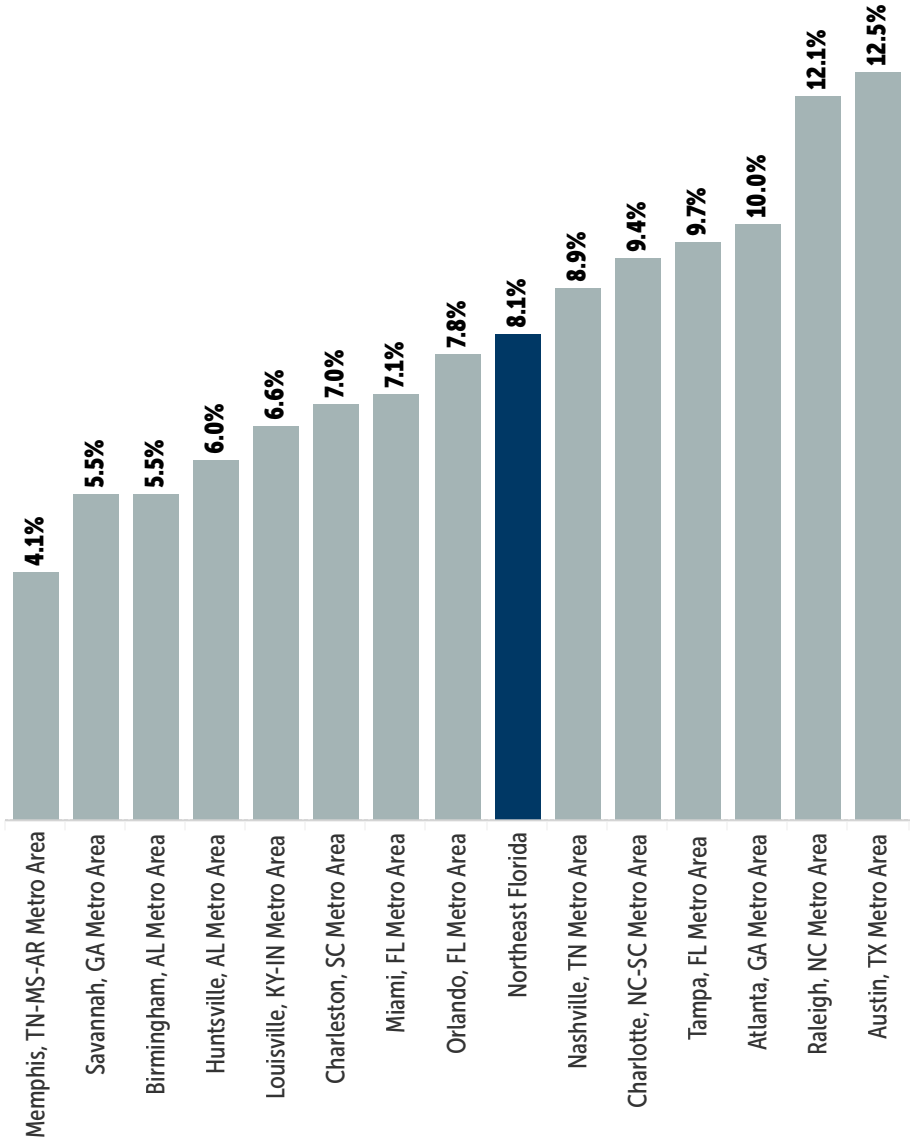
NORTHEAST FLORIDA VERSUS STATEWIDE AND NATIONAL POPULATION GROWTH PATTERNS



Source(s): US Census Bureau, Population Estimates Program; Moody's Analytics; TIP Strategies, Inc.
Note(s): Population estimates prior to 2010 are sourced from Moody's Analytics. Estimates from 2010 to 2021 are sourced from the US Census Bureau's Population Estimates Program vintages 2020 and 2021.

FIGURE 5. SHARE OF THE EMPLOYED POPULATION WHO WORKS FROM HOME, 2020

SHARE OF WORKERS (16 AND OLDER) WHO WORKED FROM HOME



Source(s): American Community Survey, 2020 5-year sample; TIP Strategies, Inc.

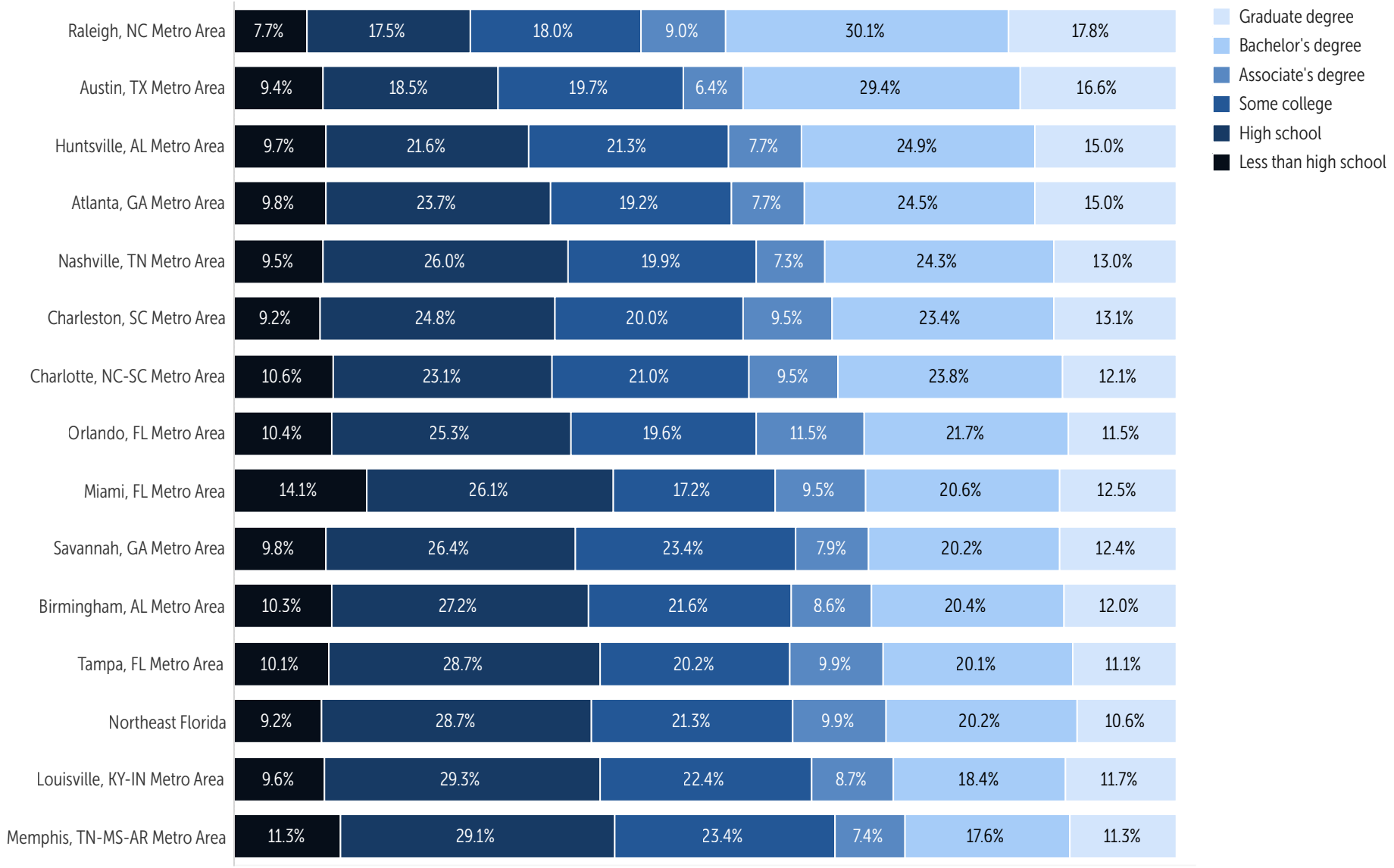
Northeast Florida's educational attainment lags many of its peers.

One might reasonably expect work-from-home rates and educational attainment rates to have a strong correlation. College degrees are often associated with office jobs, like engineers, architects, lawyers, business executives, journalists, and editors. So why does Northeast Florida's position in Figure 5 look so different from Figure 6? In Figure 6, Austin and Raleigh indeed rank high in educational attainment, falling closely in line with their high ranks in work-from-home comparisons. But Northeast Florida's educational attainment falls far below its peers, landing between Birmingham and Memphis. The reason for this may be a bit of a demographic mirage. Florida's metropolitan areas shown in Figure 6 compare rather unfavorably to many of their peers in educational attainment, a measure that typically assesses the total population age 25 and older. For decades, educational attainment rates have risen nationwide as young adults have increasingly accessed higher education. This has resulted in a pattern in which younger age cohorts are generally better educated than older ones. Metropolitan areas with youngish populations, like Austin and Raleigh, will tend to fair better in comparisons, in part because of demographic advantages. With large retirement populations, Florida's metropolitan areas, including Northeast Florida, can be unfairly penalized in such comparisons, especially when business prospects are using educational attainment in weighing expansion decisions. In such cases, the JAXUSA Partnership might consider using special tabulations from the American Community Survey to show the educational attainment of the population age 25 to 64, which is a closer approximation of the region's potential labor force.[5] Furthermore, high school graduation rates vary dramatically across the region as well as by race and ethnicity. In order to close this gap and increase graduation rates across the board, targeted investments must be made in workforce development in historically underserved communities throughout Northeast Florida.

5 This approach may require manual calculations. At data.census.gov, search for Table B23006 ("Educational Attainment by Employment Status for the Population 25 to 64 Years").

FIGURE 6. EDUCATIONAL ATTAINMENT, 2020

POPULATION (25 AND OLDER) BY SHARE OF EDUCATIONAL ATTAINMENT



Source(s): American Community Survey, 2020 5-year sample; TIP Strategies, Inc.
Note(s): Educational attainment is only measured for the population 25 and older. High school includes equivalency. Some college indicates no degree was received. Graduate degree includes professional degrees and doctoral programs.

Incomes vary dramatically across the region.

Sometimes it is difficult to envision what income inequality really means in one's own neighborhood. Figure 7 (page 31) shows the stark reality of the income divide across Northeast Florida's seven counties. St. Johns County, the region's most affluent county, has a median income that exceeds the national household benchmark by more than one-quarter. At the other end of the spectrum, Putnam County's median household income is less than two-thirds that of the US overall. The discovery phase of this project uncovered similar disparities in incomes by race and ethnicity. In order to build generational wealth, strategic emphasis should be placed on increasing the number of first-time homeowners as well as supporting entrepreneurship and increasing capital for small business owners to grow their businesses.

Two-thirds of Northeast Florida's housing units have been added since 1980.

Nearly one-third of Northeast Florida's housing units have been built in the past two decades, and another one-third of the housing stock was added in the two decades before that. Of the major Florida metropolitan areas, only Orlando has a higher share of its housing stock that is so recently constructed. High housing costs nationwide have been linked to inadequate rates of residential construction. Maintaining a brisk pace of housing construction can be challenging, especially in an environment of rising interest rates that stymies residential developers. When combined with Northeast Florida's population growth, it becomes clear that the region must focus on building additional and attainable housing units across the region to meet workforce demands.

Northeast Florida is an interconnected, interdependent region.

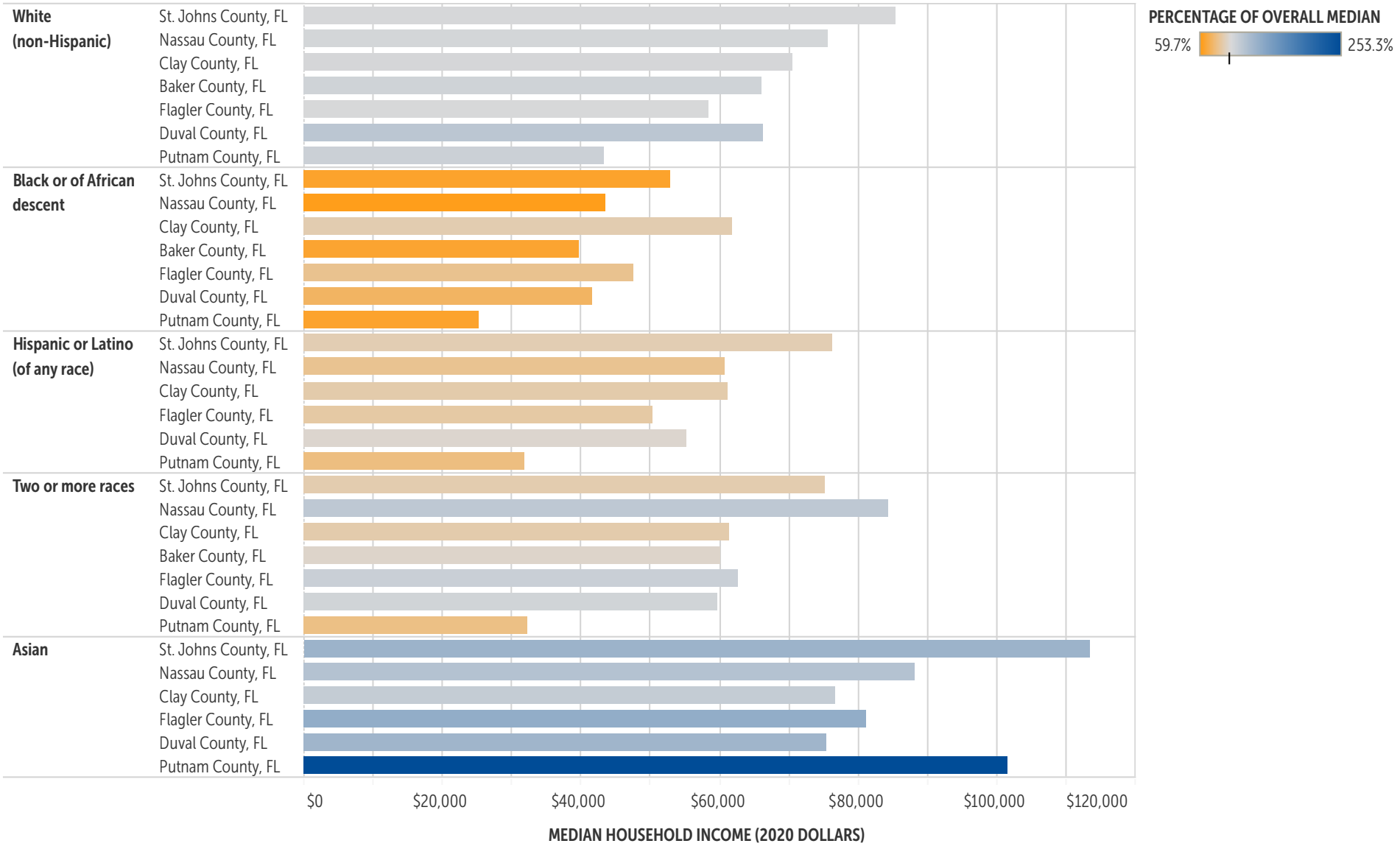
An overwhelming share of employed residents in Northeast Florida works within the seven-county region. All seven counties contain notable nodes of employment of varying size (Figure 9, page 32). While there is some commuting to workplaces outside the region, it is mostly limited to Daytona Beach (Volusia County) to the south and Gainesville (Alachua County) to the west. This finding demonstrates the interconnectedness of the region and underlines the importance of regional collaboration to advance economic growth. Efforts to secure investments for transportation and regional infrastructure will be stronger if Northeast Florida takes a coordinated approach to economic development.

Nonstop air passenger options are mostly limited to the eastern one-half of the US.

It is somewhat unusual for a single state, even a populous state like Florida, to have a large number of airports with dense nonstop service. Florida's major airports in Miami (MIA), Fort Lauderdale (FLL), Tampa (TPA), and Orlando (MCO) all enjoy a rich density of nonstop passenger flights to both international and coast-to-coast domestic destinations. In contrast, Northeast Florida is served primarily by the Jacksonville International Airport (JAX) with nonstop options that are generally limited to destinations in the eastern one-half of the continental US. This is a pattern that existed before the COVID-19 pandemic and continues during the recovery. While this limitation may be a modest annoyance for Northeast Florida residents who need connecting flights to reach the West Coast or destinations abroad, it can be a more substantial obstacle for business travel. Businesses looking to expand into Northeast Florida from western states or other countries could feasibly be eliminating the region due to connectivity concerns before it ever reaches short-list consideration. The region must work in coordination with public and private partners to support the growth of nonstop destinations out of JAX to improve its competitive positioning against peer markets.

FIGURE 7. MEDIAN HOUSEHOLD INCOME, 2020

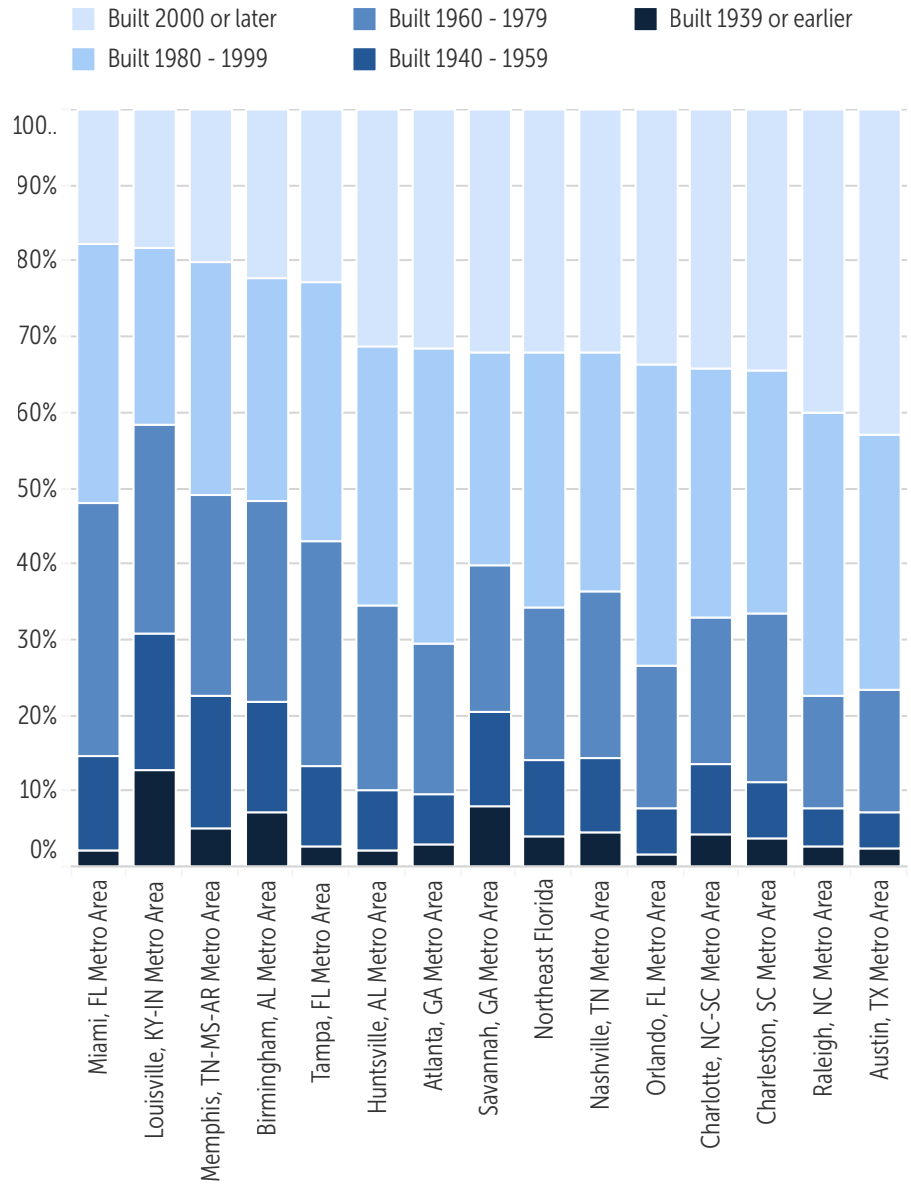
MEDIAN HOUSEHOLD INCOMES ACROSS THE SEVEN NORTHEAST FLORIDA COUNTIES



Source(s): American Community Survey, 2020 5-year sample; TIP Strategies, Inc.

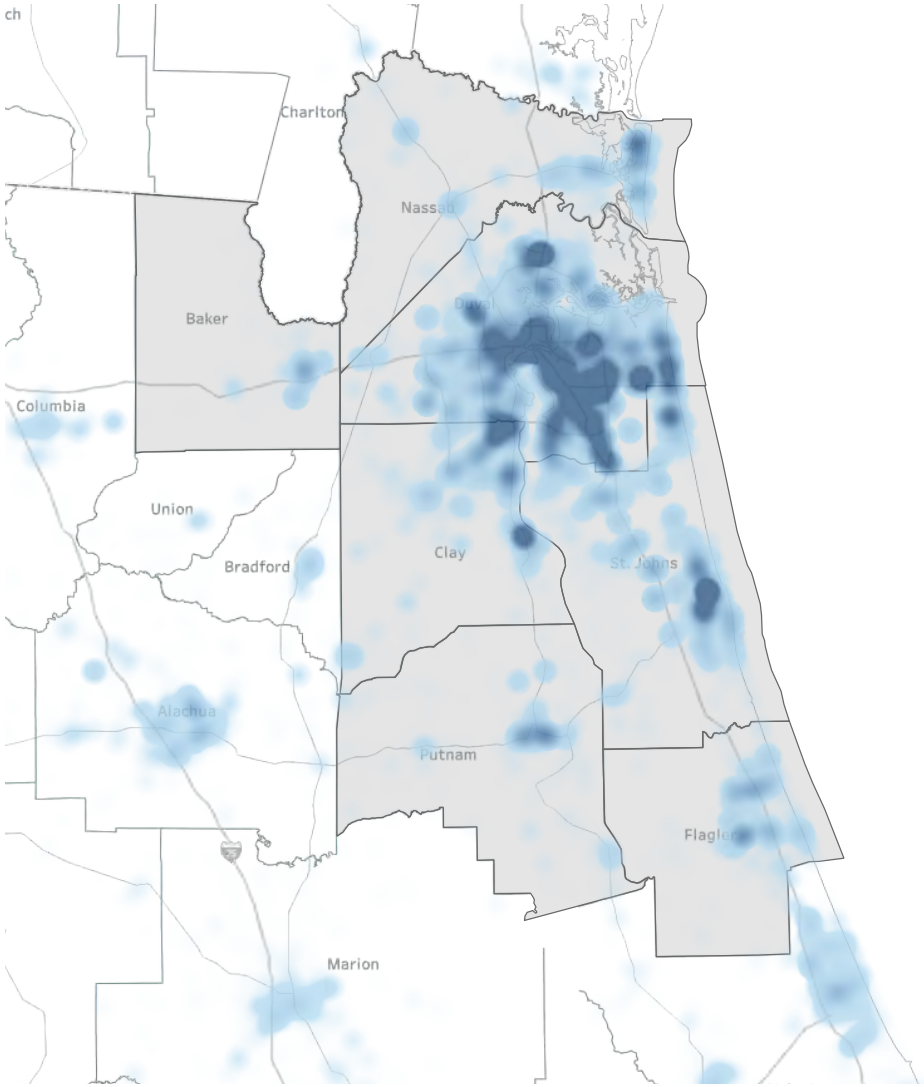
FIGURE 8. AGE OF HOUSING STOCK

SHARE OF HOUSING UNITS BY YEAR OF CONSTRUCTION



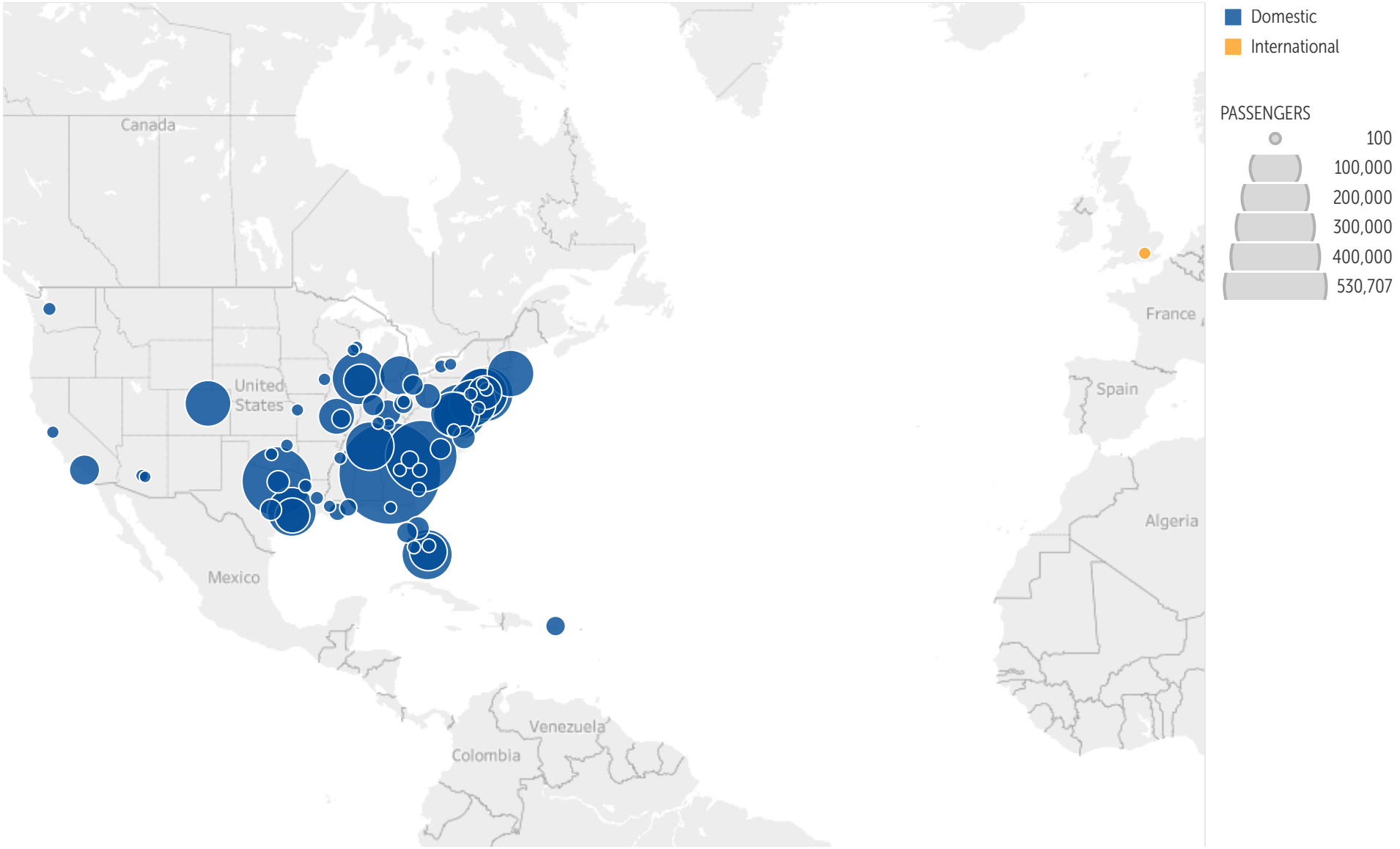
Source(s): American Community Survey, 2020 5-year sample; TIP Strategies, Inc.

FIGURE 9. WHERE NORTHEAST FLORIDA RESIDENTS WORKED IN 2019



Source(s): Longitudinal Employer-Household Dynamics (LEHD), Origin-Destination Employment Statistics (LODES); TIP Strategies, Inc.
Note(s): The map shows where residents work by census block group. Darker, larger circles indicate more residents work in the census area, and lighter, smaller circles indicate fewer residents work in that area. The shaded gray region shows the seven counties in Northeast Florida.

FIGURE 10. AIR PASSENGER DEPARTURES FROM JACKSONVILLE IN 2021
TOTAL PASSENGER VOLUME FOR DOMESTIC AND INTERNATIONAL DESTINATIONS



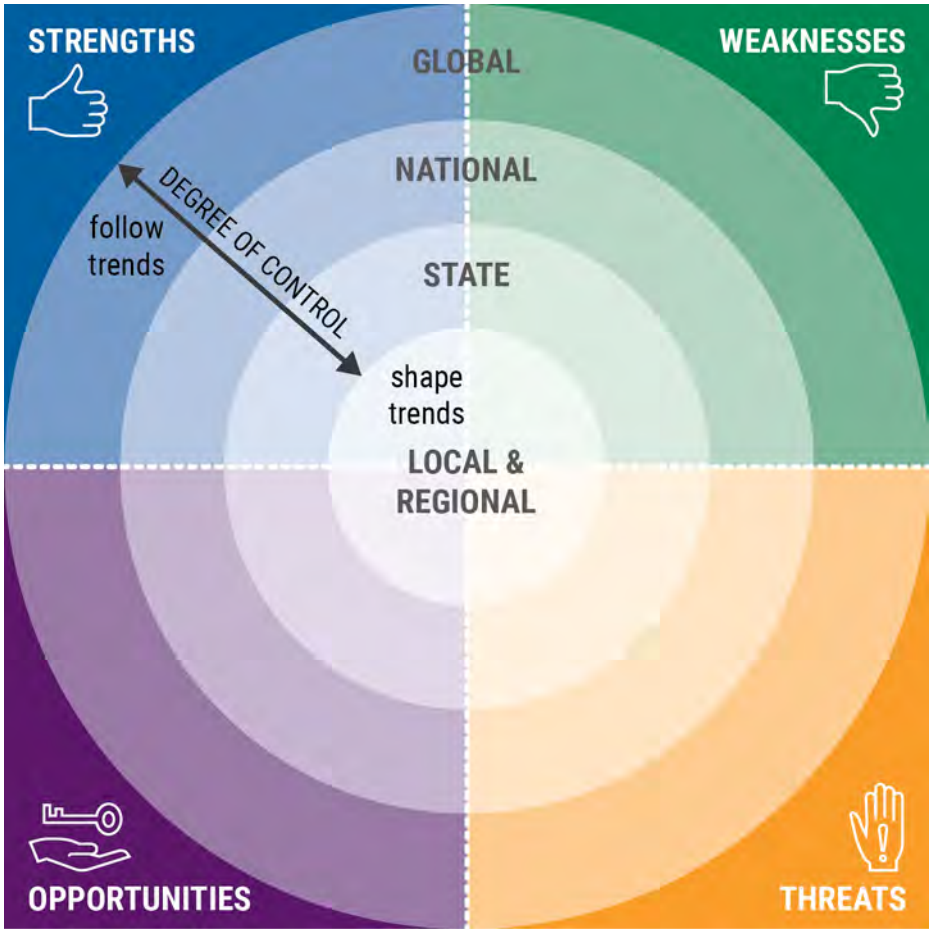
Source(s): US Bureau of Transportation Statistics, T-100 Segment Reports for All Carriers; TIP Strategies, Inc.
Note(s): Only includes scheduled passenger flights, non-scheduled civilian passenger flights, and destinations with at least 100 annual passengers.

Ocean Pond Park (Baker County)

APPENDICES

APPENDIX A. SWOT ANALYSIS

FIGURE 11. SWOT OVERVIEW



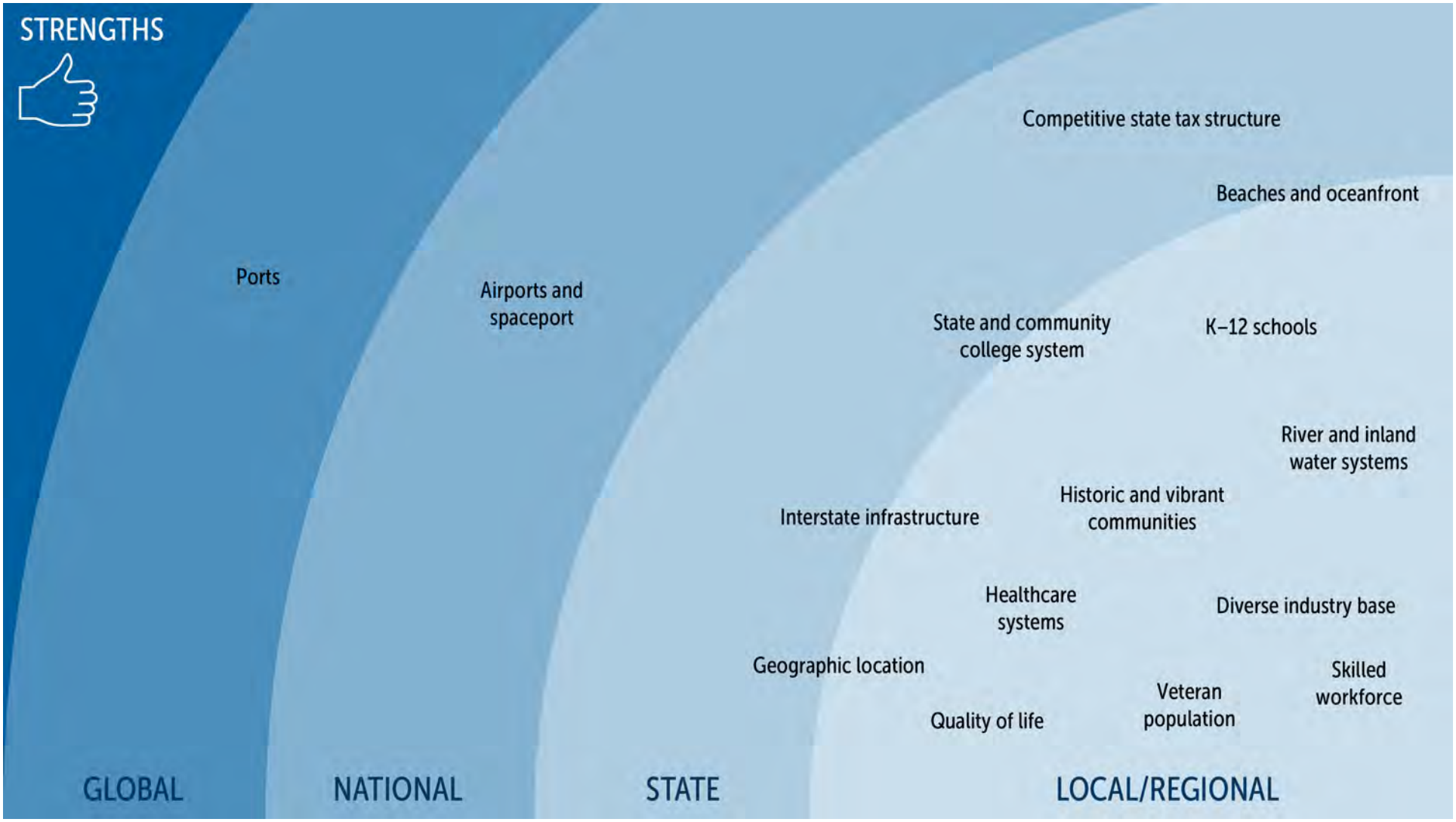
Source(s): TIP Strategies, Inc.

During the discovery phase of the project, the consulting team gathered qualitative input from stakeholders concerning regional economic development issues. In addition, TIP conducted quantitative data analyses to understand Northeast Florida's competitive position in the region. The results of these efforts informed the following strengths, weaknesses, opportunities, and threats (SWOT) analysis.

The four components of a SWOT analysis can be defined as follows.

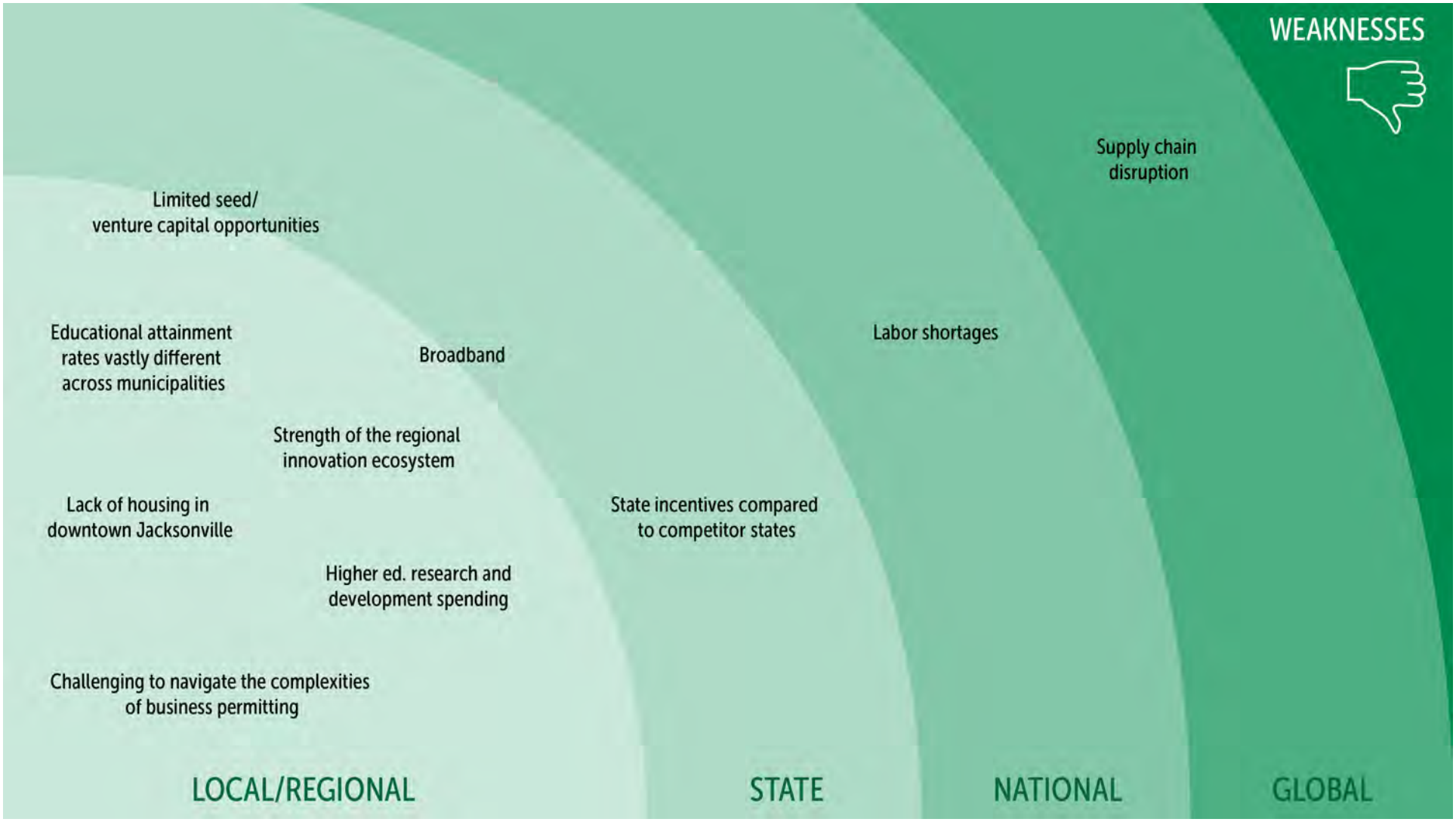
- Strengths: Assets and resources that can be built on to grow, strengthen, and diversify the local/regional economy.
- Weaknesses: Liabilities and barriers to economic development that could limit economic growth potential.
- Opportunities: Competitive advantages and positive trends that hold significant potential for the attraction of new businesses, investments, and skilled workers.
- Threats: Unfavorable factors and trends (often external) that could negatively affect the local/regional economy.

FIGURE 12. NORTHEAST FLORIDA REGION STRENGTHS



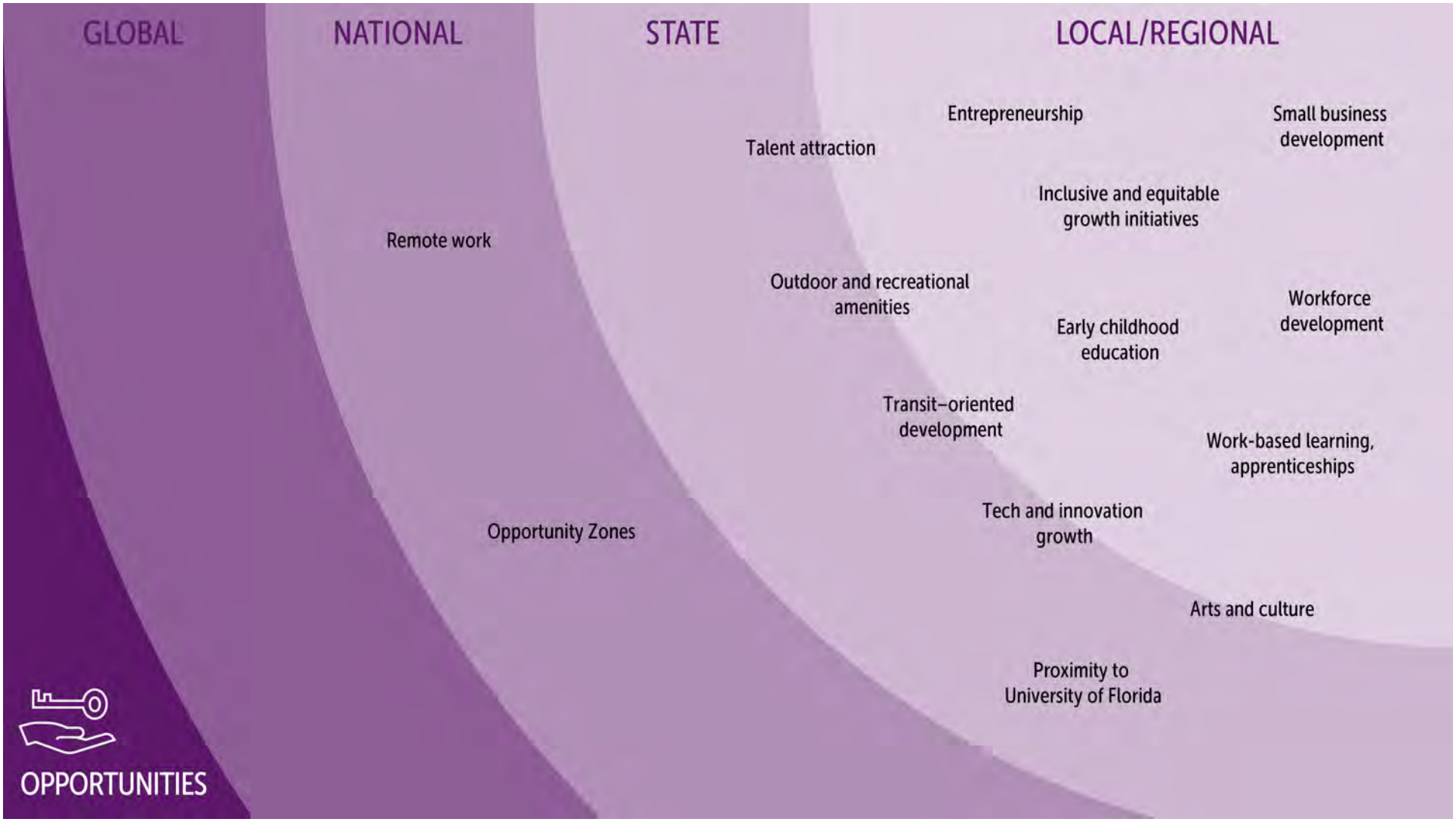
Source(s): TIP Strategies, Inc.

FIGURE 13. NORTHEAST FLORIDA REGION OPPORTUNITIES



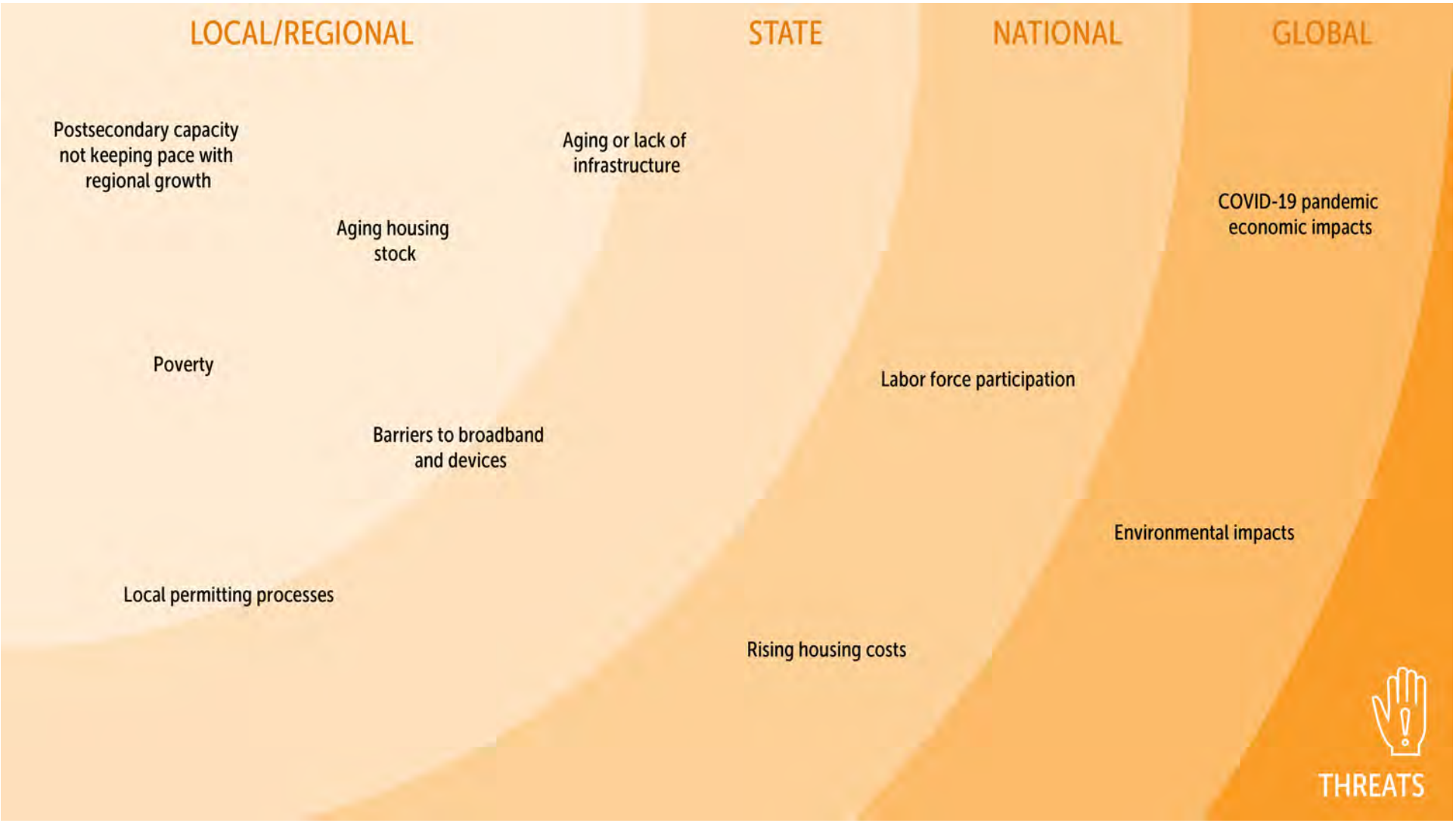
Source(s): TIP Strategies, Inc.

FIGURE 14. NORTHEAST FLORIDA REGION WEAKNESSES



Source(s): TIP Strategies, Inc.

FIGURE 15. NORTHEAST FLORIDA REGION THREATS



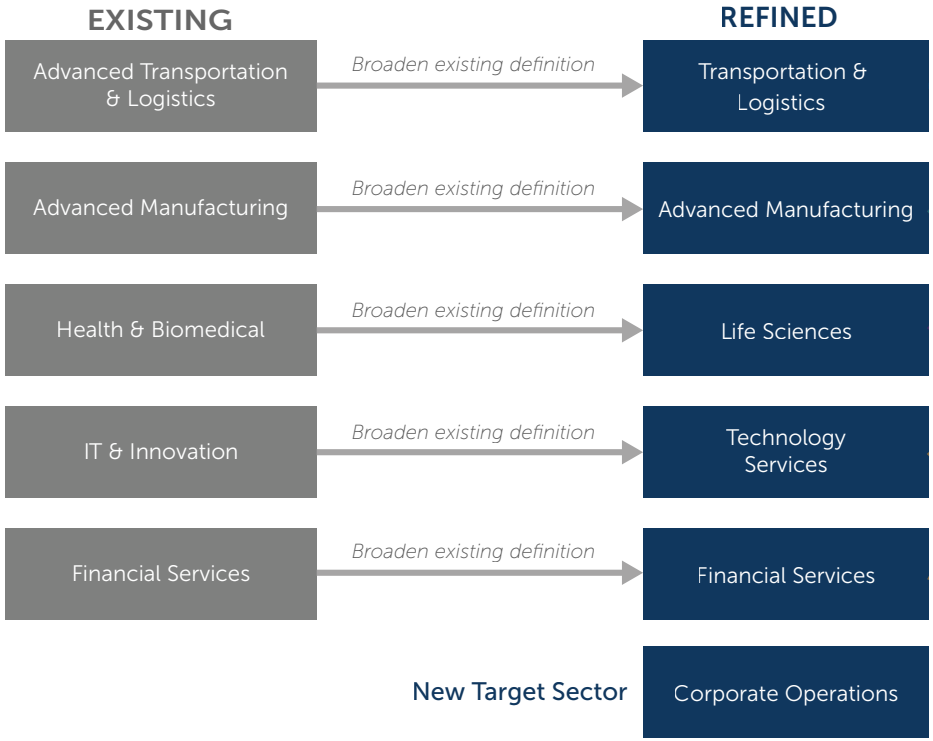
Source(s): TIP Strategies, Inc.

APPENDIX B. TARGET INDUSTRIES

The target industry clusters laid out in the 2018 *Elevate Northeast Florida* strategic plan (the 2018 targets) are strongly established and based on historical economic strengths. This framework, however, has posed some minor management and marketing challenges. From an administrative perspective, relatively narrow and sometimes overlapping target definitions have not aligned well with investment prospects. In the interest of pragmatism, the internal definitions for each existing JAXUSA Partnership target have been expanded to the maximum extent possible to clarify day-to-day workloads and assignments. To accomplish this, North American Industry Classification System (NAICS) codes were grouped in a mutually exclusive framework around similar business activities and property leasing patterns. For example, wholesale activities were grouped with Transportation & Logistics because they are part of a wider group of companies whose expansion needs usually center on the availability of properties suitable for warehousing and distribution. And virtually all production activities were grouped under Advanced Manufacturing without judgment as to whether their production processes are recognized by International Organization for Standardization standards or their products are deemed as truly "advanced" by some arbitrary threshold. As investment prospects, these companies still have similar needs for location assistance.

These updated reclassifications are internal and do not significantly impact the overall headline structure of the five core JAXUSA Partnership target sectors, nor do they impact the general marketing pitches for these targets. Some of the targets, however, would benefit from a clarification of the 2018 target name in marketing materials (see Action 2.3.3). For example, the name IT & Innovation may inadvertently confuse audiences because it does not align neatly with NAICS codes and the name as written is left open to varying interpretations. Because technology hardware manufacturing was already captured elsewhere in this NAICS taxonomy, this target was renamed Technology Services, which includes non-manufactured technology services, such as software design, data centers, and multimedia services. Also, the sizable Financial Services umbrella was refined by pulling out all other office-using activities into a broadly named sixth target called Corporate Operations.

FIGURE 16. TARGET SECTOR ALIGNMENT



Source(s): TIP Strategies, Inc.

APPENDIX C. INNOVATION ECOSYSTEMS

Northeast Florida already has an established target industry framework, underpinned by the depth and experience of a successful business recruitment program. Other than some minor administrative and marketing adjustments (as outlined in Appendix B), this program is fully functional and operational. The real challenge for Northeast Florida is deeper than recruitment. The region's future lies in its ability to nourish underlying ecosystems of innovative activity already at work on the ground.

And what exactly is an innovation ecosystem? Unlike a target sector, which can be clearly delineated by industry classification systems, an emerging ecosystem can be more ambiguous. The ambiguity occurs because a new technology (like blockchain security, for example) can crosscut an entire range of industries with economic credibility and long-term staying power, yet it can still remain elusive to traditional classification systems for industries.

To be successful, an innovation ecosystem requires several viable components.

- Are there anchor institutions to provide a stable platform for economic activity?
- Is startup activity occurring and do emerging companies have the resources they need to get off the ground, e.g., networking events, competitions, ample capital sources, local champions?
- And crucially, is there public awareness of these activities? Without public awareness, there is no buzz, no momentum, no community support. Do established local media outlets have dedicated journalists who cover technology and innovation exclusively? Do alternative media outlets exist to spotlight innovative companies and activities?

Using these six components as a guide, the consulting team initially identified four ecosystems—or at least some parts of them—where nascent activities could be identified on the ground in Northeast Florida. Those initial areas were fintech, biomedical research, space and defense technologies, and intermodal logistics. Each of these four possesses a *plurality* of the necessary components for a viable ecosystem, though each requires a strong regional champion—a promoter, a convener, a listener, a mentor, a fundraiser—if they are ever to become more than a sum of their parts. And to be sure, what is needed most for these nascent ecosystems is not business recruitment. Rather, what each lacks is an outspoken, high-visibility regional champion.

Through fieldwork and collaborative discussions during the engagement, the initial list of potential regional ecosystems expanded to also include health tech and agribusiness. Each of these six innovation ecosystems has loose ties to the target industry framework, but as shown in Figure 18 (page 44), these ties can be somewhat overlapping. This is yet another reason that any innovation ecosystem should be viewed through an entirely different lens than a business recruitment program. The concept of innovation should be approached *adjacent* to the target sectors but not *embedded* within them. The innovation areas highlighted will require significant investments—in physical infrastructure, in educational programming, in talent pipelines, and in the nurturing and cross-pollination of institutional relationships. These innovation niches are the targets of the future. All of these investments can occur alongside existing targets, but they must be developed with a different programmatic vision than existing traditional industry recruitment. Target recruiting serves a complementary purpose but represents a different point on the spectrum of industry lifecycles.

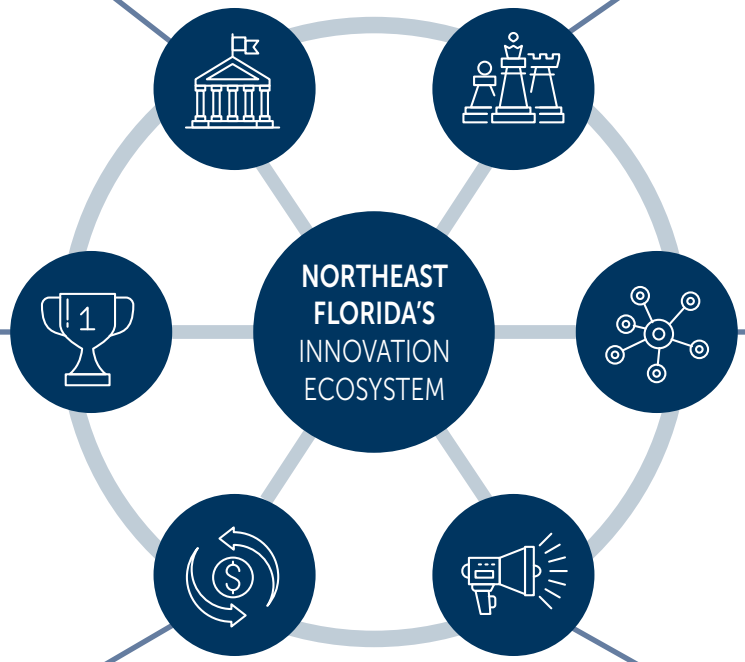
FIGURE 17. INNOVATION ECOSYSTEM OVERVIEW GRAPHIC

ANCHOR INSTITUTIONS

Anchor institutions—universities, hospitals, and major employers—are interwoven in Northeast Florida's economic, social, and cultural fabric. Partnering with anchors in economic development efforts can drive innovation and enrich economic vitality.

EMERGING PARTICIPANTS

Emerging participants, including scrappy startups and innovative entrepreneurs, have the potential to change the trajectory of a region. The buzz, innovation, and energy these emerging players bring is essential to renewing and reinventing a region's economy.



COMPETITIONS AND EVENTS

Events can drive growth by cultivating sector-based networks, attracting tourists, and building the region's brand. Competitions and events not only raise the profile of a community with outsiders, but also connect a community to a larger network of aligned stakeholders.

BUILDING BLOCKS

No ecosystem can thrive without a group of ecosystem builders that focuses on collaboration across organizations, inclusion of diverse voices, and sustainability of economic development efforts. These builders can be coworking spaces, catalytic programs, or even visionary individuals.

LOCAL CAPITAL

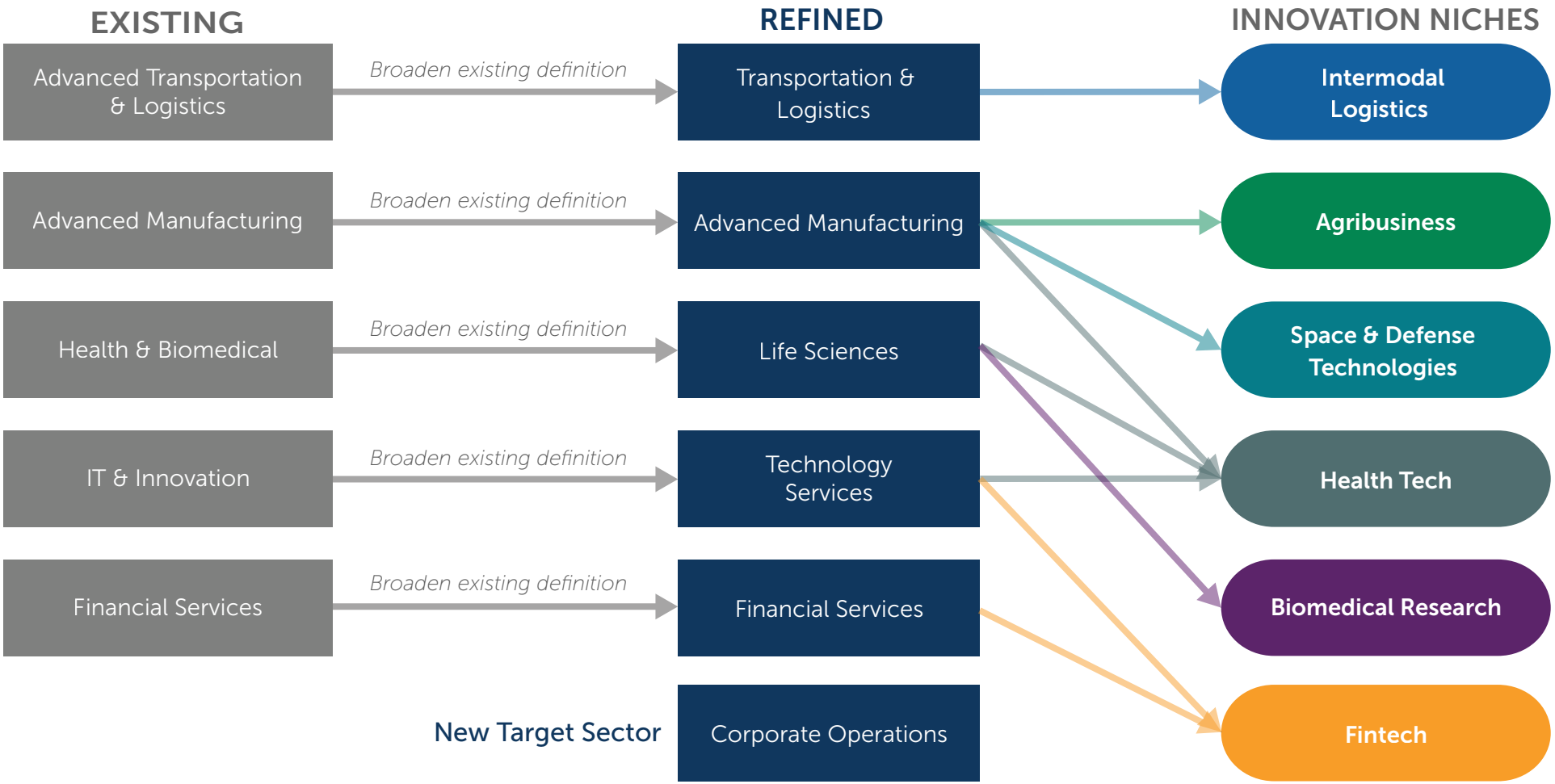
Access to capital can facilitate new ideas, deepen partnerships, and result in bigger impact for companies and regional organizations. Ranging from venture capital to philanthropic grants, local capital is central to growth and success.

PUBLIC AWARENESS

Branding and marketing are vital to growth. The region's success stories should be shared widely through traditional media, social media, and industry specific channels. Bringing attention to the businesses and people that are the heartbeat of a community can drive investment and foster growth.

Source(s): TIP Strategies, Inc.

FIGURE 18. IDENTIFICATION OF INNOVATIVE NICHES



Source(s): TIP Strategies, Inc.

FIGURE 19. ANALYSIS OF INNOVATIVE NICHES

NORTHEAST FLORIDA INDUSTRY NICHES & GLOBAL INVESTMENT TRENDS

Innovative Niche Opportunities for Northeast Florida

OVERVIEW

Northeast Florida's target industry clusters are based on historical economic strengths. Within these broad industry groups, narrow selections of innovative niches present regional opportunities for increased specialization and growth. Each innovative niche is defined by a selected group of industries (6-digit NAICS codes) that may overlap in multiple target industries. To better understand these niches and their opportunities for Northeast Florida, this analysis first examines existing employment trends and regional specializations.

Rather than focusing solely on trends from the past, TIP then examine the hiring patterns of major employers in these niches using their national job postings for the 12-month period ending in August 2022 and identifying the top 15 occupations in their collective hiring pipelines. This approach highlights the workforce of the niche, including the occupational composition of each target, the demographic compositions of those occupations, and an analysis of workers' earnings compared to the minimum threshold needed to support a household in Northeast Florida.

Additionally, investment headwinds can help indicate the strength of a niche on the global stage. TIP analyze venture capital and major global institutional investments using keywords to identify activity in areas related to each niche as well as the potential for future investment activity using market signals.

Note: Throughout this workbook, Northeast Florida refers to the collection of seven counties surrounding the Jacksonville metro area: Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns counties. Image of Jacksonville by Ken McCray provided by JAXUSA
Source(s): US Bureau of Labor Statistics, Lightcast, Crunchbase, fDi Markets.

JAXUSA PARTNERSHIP THE JACKSONVILLE REGION

TIP STRATEGIES

NICHE INDUSTRIES

- FINTECH
- BIOMEDICAL RESEARCH
- SPACE & DEFENSE TECHNOLOGIES
- INTERMODAL LOGISTICS
- HEALTH TECH
- AGRIBUSINESS

EMPLOYMENT OVERVIEW

- Target Industry Employment
- Trends in Targets and Niches
- Niche Specialization

TALENT PROFILE

- Niche Characteristics
- Occupation Demographics
- Occupation Earnings
- Labor Demand Comparison

GLOBAL INVESTMENT

- Global Venture Capital Trends
- Venture Capital Funding Destinations
- Out-of-State Investment Destinations
- Out-of-State Investment Sources
- Market Signals

Source(s): TIP Strategies, Inc.

To better understand the emerging landscape for the six innovative niches, a rigorous analysis was undertaken. This consisted primarily of a review of global investment patterns occurring within these niches. This included global patterns of venture capital investment as well as cross-border trends for fixed capital investments in the US.

This review of capital investment patterns was further supplemented with an assessment of local workforce capabilities. Which occupations are most in demand for the employers within these niches, and what are the specific skills required for these jobs? Do the jobs pay living wages? Is the regional talent pipeline ample and growing to satisfy the needs of these innovative niches? This detailed analysis was delivered separately in an interactive data visualization (Figure 19, page 45).

Finally, what follows is an inventory of Northeast Florida's innovative ecosystems. It encompasses the initial niches identified in the analysis: fintech, biomedical research, space and defense technologies, and intermodal logistics. These four niches were later expanded to include health tech and agribusiness; however, inventories were not completed for these additional niches as part of the planning process.

For each of the four initial niches, the following six components were reviewed.

- Anchor institutions
- Competitions and events
- Local capital
- Emerging participants
- Building blocks
- Public awareness

A brief description of the components is provided in Figure 17 (page 43). The complete inventories are shown on the following pages.

Palatka Riverfront (Putnam County)

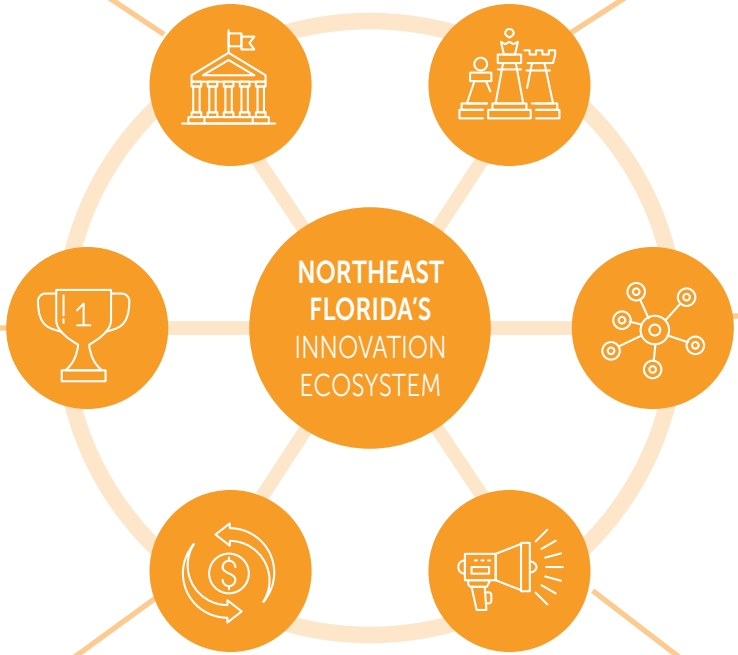
FINTECH

ANCHOR INSTITUTIONS

- Jacksonville University (new fintech programs)
- Major employers, including FIS, Bank of America, Florida Blue, Citi, JPMorgan Chase, Deutsche Bank, Black Knight, Parallon, Aetna, Wells Fargo, et al.
- Florida State College at Jacksonville
- University of North Florida (UNF)

EMERGING PARTICIPANTS

- Paywallet
- FSV Payment Systems
- NYMBUS
- Bee
- Azimuth GRC
- Pixel Vault



COMPETITIONS AND EVENTS

- Annual Cade Prize
- Tech Coast Conference
- Code on the Beach
- Female Founders Forum
- Black Entrepreneurs Forum
- Leadership Week

BUILDING BLOCKS

- Jacksonville IT Council (JITC)
- Jax Tech
- Starter Space (Gainesville)
- Center for Innovation and Economic Development (CIED) (Santa Fe College, Gainesville)

LOCAL CAPITAL

- PS27 Ventures
- PruVista Capital
- venVelo (Winter Park)
- Lovett Miller & Co.

PUBLIC AWARENESS

- *First Coast Inno*
- *Jacksonville Business Journal*

Source(s): TIP Strategies, Inc.

BIOMEDICAL RESEARCH

ANCHOR INSTITUTIONS

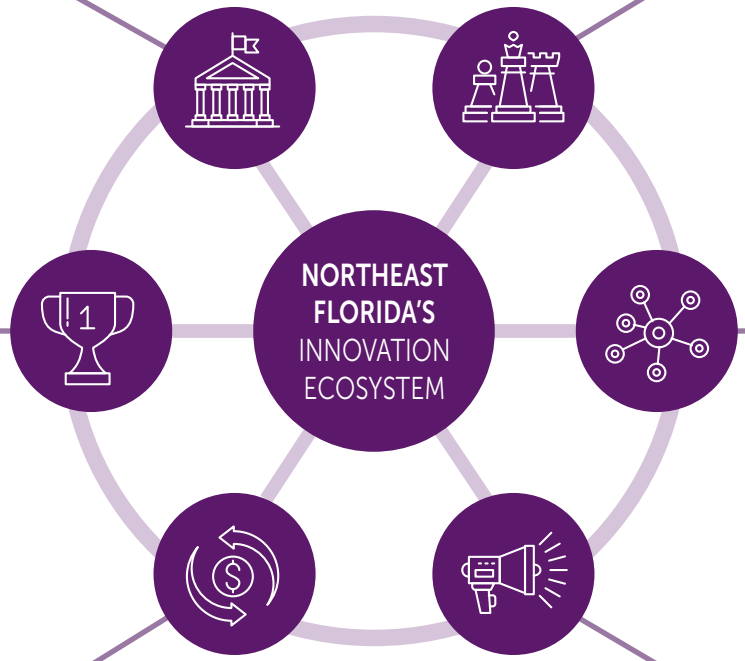
- UNF Brooks College of Health
- University of Florida (UF) Health Jacksonville
- UF Health Science Center Jacksonville
- UF College of Medicine—Jacksonville
- Mayo Clinic, Jacksonville
- Jacksonville Aging Studies Center
- UF Health McKnight Brain Institute (Gainesville)
- Baptist Health

EMERGING PARTICIPANTS

- Availity
- Acclivity Health Solutions
- Clearsense

COMPETITIONS AND EVENTS

- Annual Cade Prize
- Tech Coast Conference
- Female Founders Forum
- Black Entrepreneurs Forum
- Leadership Week



BUILDING BLOCKS

- Jax Tech
- Starter Space (Gainesville)

LOCAL CAPITAL

- PS27 Ventures
- Sontag Foundation
- Emergent Growth Fund (Gainesville)
- DeepWork Capital (Orlando)
- Ballast Point Ventures (Tampa)
- Lovett Miller & Co.

PUBLIC AWARENESS

- *Jacksonville Business Journal*
- *Jacksonville Daily Record*
- *First Coast Inno*
- *Discovery's Edge*
- *Mayo Clinic Magazine*

Source(s): TIP Strategies, Inc.

SPACE AND DEFENSE TECHNOLOGIES

ANCHOR INSTITUTIONS

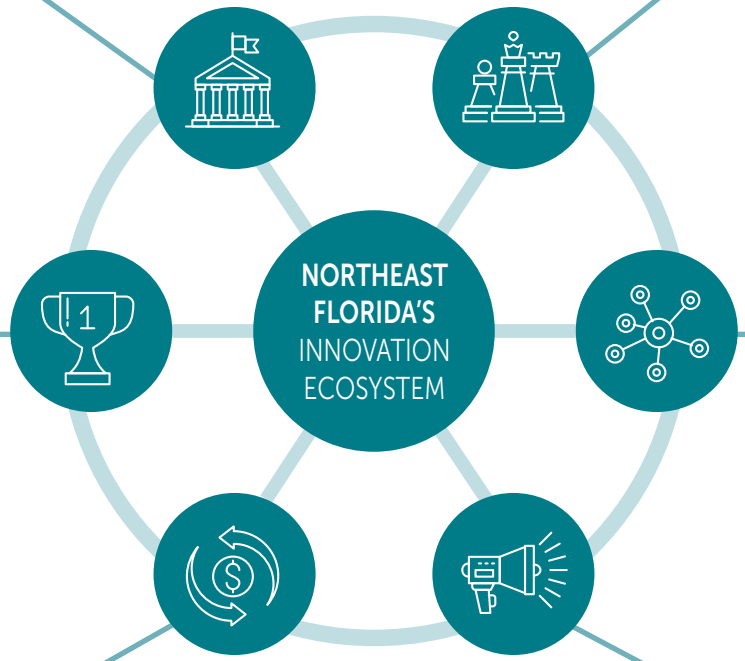
- Jacksonville University (multiple degree programs in aviation, military sciences, and cybersecurity)
- US Navy Fleet Readiness Center Southeast
- UNF School of Engineering
- Florida State College at Jacksonville Advanced Manufacturing (Automation) Technical Certificate program
- Cecil Airport and Spaceport

EMERGING PARTICIPANTS

- Redwire
- Drone Aviation

COMPETITIONS AND EVENTS

- STEP Forward: Jacksonville
- Tech Coast Conference
- Female Founders Forum
- Black Entrepreneurs Forum
- Leadership Week



BUILDING BLOCKS

- Jax Tech

LOCAL CAPITAL

- PS27 Ventures
- Indigo South Capital
- Dubin Clark & Company, Inc.

PUBLIC AWARENESS

- *First Coast Inno*
- *Jacksonville Business Journal*
- *Jacksonville Daily Record*
- *Florida Times-Union*
- *Jacksonville Free Press*

Source(s): TIP Strategies, Inc.

INTERMODAL LOGISTICS

ANCHOR INSTITUTIONS

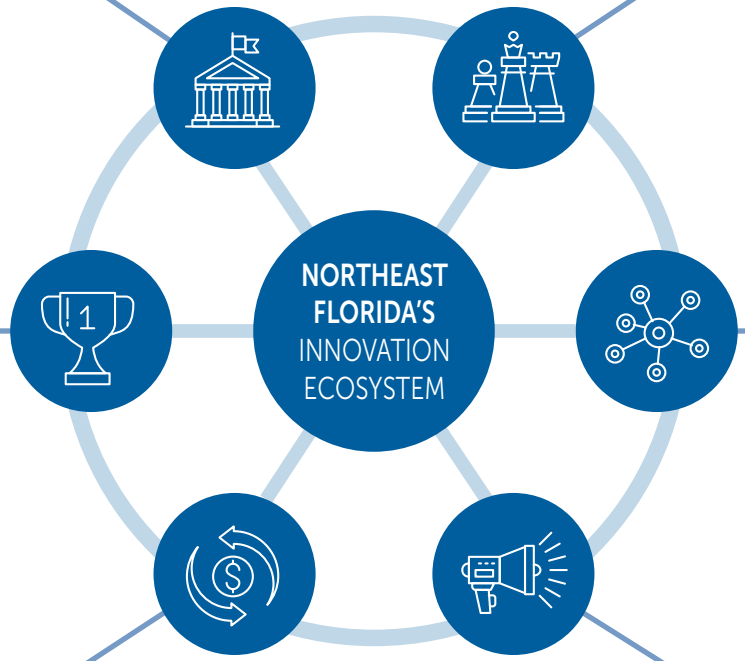
- Jacksonville Port Authority
- Jacksonville Aviation Authority
- Crowley Maritime
- UNF Suddath Logistics Information Technology Solutions Lab
- UNF Crowley Center

EMERGING PARTICIPANTS

- Urban SDK

COMPETITIONS AND EVENTS

- Female Founders Forum
- Black Entrepreneurs Forum
- Leadership Week



BUILDING BLOCKS

- Jax Tech
- Greater First Coast Chamber
- Gainesville Technology Entrepreneurship Center (Santa Fe College, Gainesville)
- Smart North Florida

LOCAL CAPITAL

- PS27 Ventures
- Dysruptek
- DeepWork Capital (Orlando)
- Warren Equity Partners
- Dubin Clark & Company, Inc.

PUBLIC AWARENESS

- *Jacksonville Business Journal*
- *First Coast Inno*

Source(s): TIP Strategies, Inc.

APPENDIX D. IMPACT

Measuring the impact of the strategic plan is a vital component of assessing the region's economic health. Metrics can be divided in three areas: baseline community indicators, economic development indicators, and strategic action indicators. Baseline community indicators include social and demographic metrics that can be benchmarked against other communities, such as population growth and educational attainment. Economic development indicators are tied to the actions of economic development organizations and would include metrics such as media impressions and the number of new businesses recruited to the region. The third area, strategic action indicators, can be found on the plan's implementation matrix (published separately). These measures track actions, such as forming a committee. In addition to tracking performance metrics, implementation partners will convene to ensure the plan is moving forward.

BASELINE COMMUNITY INDICATORS*	ECONOMIC DEVELOPMENT INDICATORS
Population change	New businesses recruited
Educational attainment	Businesses retained or expanded
Housing starts	Capital investment
Air travel trends	Startup growth and investments
Job growth	Payroll impact
Average annual wage	Tax base change
Gross regional product (GRP)	Media impressions

*Benchmarked to peer communities

Flagler College (Flagler County)

APPENDIX E. JAXUSA PARTNERSHIP 2022 INVESTORS

PRESIDENT'S CIRCLE $50K+

- Ascension St. Vincent's
- Bank of America
- Baptist Health
- Brooks Rehabilitation
- CareerSource Northeast Florida
- Clay Florida Economic Development Corporation & Clay County Development Authority
- COJ, Office of Economic Development
- CSX Corporation
- Duval County Public Schools
- Fidelity National Financial Inc.
- FIS
- Florida Blue
- HCA Florida Memorial Hospital
- Jacksonville Aviation Authority
- Jacksonville Jaguars Ltd.
- Jacksonville Port Authority
- Jacksonville Transportation Authority
- JEA
- Johnson & Johnson Vision
- Mayo Clinic
- Perdue
- PNC Financial Services
- St. Johns Office of Economic Development & St. Johns County Chamber of Commerce
- Suddath
- The Main Street America Group
- TIAA Bank
- Truist
- UF Health Jacksonville
- VyStar Credit Union

POLICY $25K+

- Ameris Bank
- ASM Global
- Auld & White Constructors
- Black Knight
- Brasfield & Gorrie LLC
- Citi
- CP Group
- England-Thims & Miller Inc.
- First Coast Energy/Daily's Convenience Stores
- Flagler County Department of Economic Opportunity
- GAI Consultants
- GreenPointe Holdings LLC
- Haskell
- Live Oak Contracting
- Macquarie Group
- Miller Electric Company
- Nassau County Economic Development Board
- Office Environments & Services Inc.
- PRI Productions
- Stellar
- THE PLAYERS Championship
- TP Corporate Lodging Inc.
- University of North Florida
- VanTrust Real Estate LLC
- Wells Fargo

ADVISORY $15K+

- AT&T
- Availity LLC
- Baker County Chamber of Commerce
- Berkshire Hathaway HomeServices Florida Network Realty
- CIT
- Clockwork Marketing Services
- Coastal Cloud
- Colliers
- Community First Credit Union
- Corner Lot
- Danis Construction
- Deutsche Bank
- Driver, McAfee, Hawthorne & Diebenow, PLLC
- Ernst & Young LLP
- Farther
- Fidelity Investments
- Florida Power & Light Company
- Florida State College at Jacksonville
- Foley & Lardner LLP
- GATE Petroleum
- Harden
- High Reason
- Jacksonville Icemen
- Jacksonville Jumbo Shrimp
- Jacksonville University
- Keiser University
- Kennetic Productions
- Marks Gray
- Meskel & Associates Engineering, PLLC
- MW Builders
- Prosser
- Putnam County Chamber of Commerce
- Regency Centers Corporation
- Regions
- Remedy Staffing
- Republic Services
- Rogers Towers P.A.
- RS&H
- SoFi
- TaxSlayer Gator Bowl & JAXSPORTS
- TD Bank
- TECO Peoples Gas
- Town of Nocatee—Davis Family Office

LEADERSHIP $7.5K

- 121 Financial Credit Union
- Amazon
- ARCO Design/Build—Jacksonville
- Emtec, Inc.
- Evans General Contractors
- Fifth Third Bank
- First Florida Credit Union
- Halff Associates
- Hargray Fiber
- Hyatt Regency Jacksonville Riverfront
- JinkoSolar (U.S.) Inc.
- Marsh
- NAI Hallmark
- North Florida Land Trust
- SSA Atlantic, LLC
- Summit Contracting Group, Inc.
- The Jessie Ball duPont Fund
- Vulcan Materials Company
- Wantman Group, Inc. (WGI)
- World Affairs Council

PARTNERSHIP $2.5K+

- Alive Credit Union
- Anheuser-Busch
- ATG + Pelocity
- BAE Systems
- Baker Design Build
- Balfour Beatty
- Batson-Cook Company Inc.
- BHE-GT&S
- CBRE
- City Facilities Management
- Connelly & Wicker Inc.
- Cushman & Wakefield
- Federal Reserve Bank Branch
- Flagler College
- Florida East Coast Railway
- Forcura
- Hans-Mill Corp
- HCA Florida Orange Park Hospital
- HDR Engineering Inc.
- ISI Demolition
- JLL
- Marand Builders
- Mercer Health & Benefits
- Merritt Properties
- Michael Baker International
- Nelson Mullins Riley & Scarborough LLP
- Newfold Digital
- Northwell
- Phoenix Realty Group, Inc.
- Prime Realty
- Quick Tie Products
- Right Management
- Saint Leo University
- SBA Edge
- ShareMD
- SNI Companies
- St. Johns River State College
- Synergy Technologies, LLC
- Synovus Bank of Jacksonville
- TAD PGS (An Adecco Group Subsidary)
- Terracon Consultants
- Tetra Tech
- The Boeing Company
- The Southern Group
- Vaco
- Visit Jacksonville
- Watson Commercial Realty, Inc.
- Workscapes

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