



Florida Florida Florida

America's "Favorite" State



So what is a Florida?

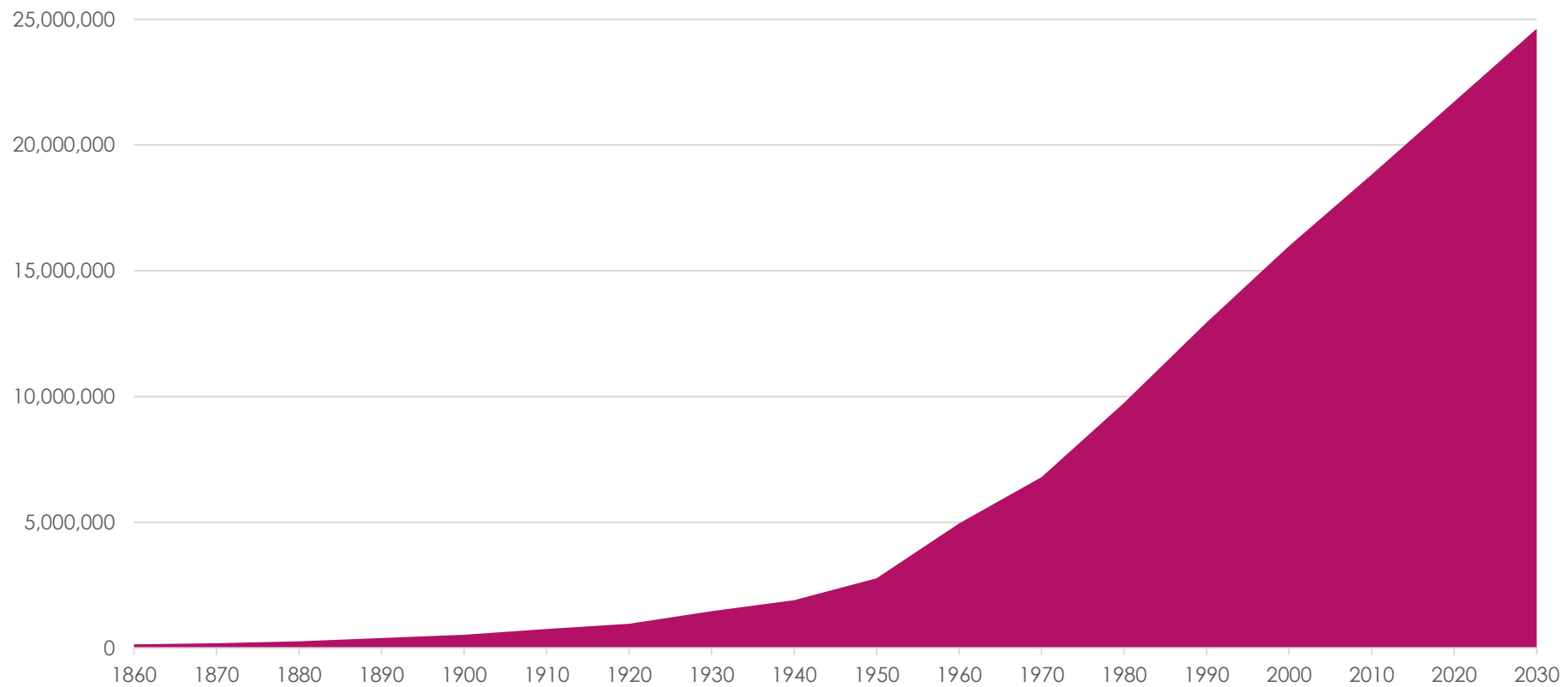
- ▶ 20.6 million residents
- ▶ 48% of population falls into an ethnic minority category.

- ▶ 12 million active voters
- ▶ 2016 saw 9.45 million votes cast for President.

- ▶ 3rd largest population in nation.
- ▶ 10 media markets.
- ▶ Equivalent to the 17th largest economy in the world, and ready to surpass Mexico
- ▶ Geographically second largest state east of Mississippi River.
- ▶ Pensacola closer to Louisville than Miami.

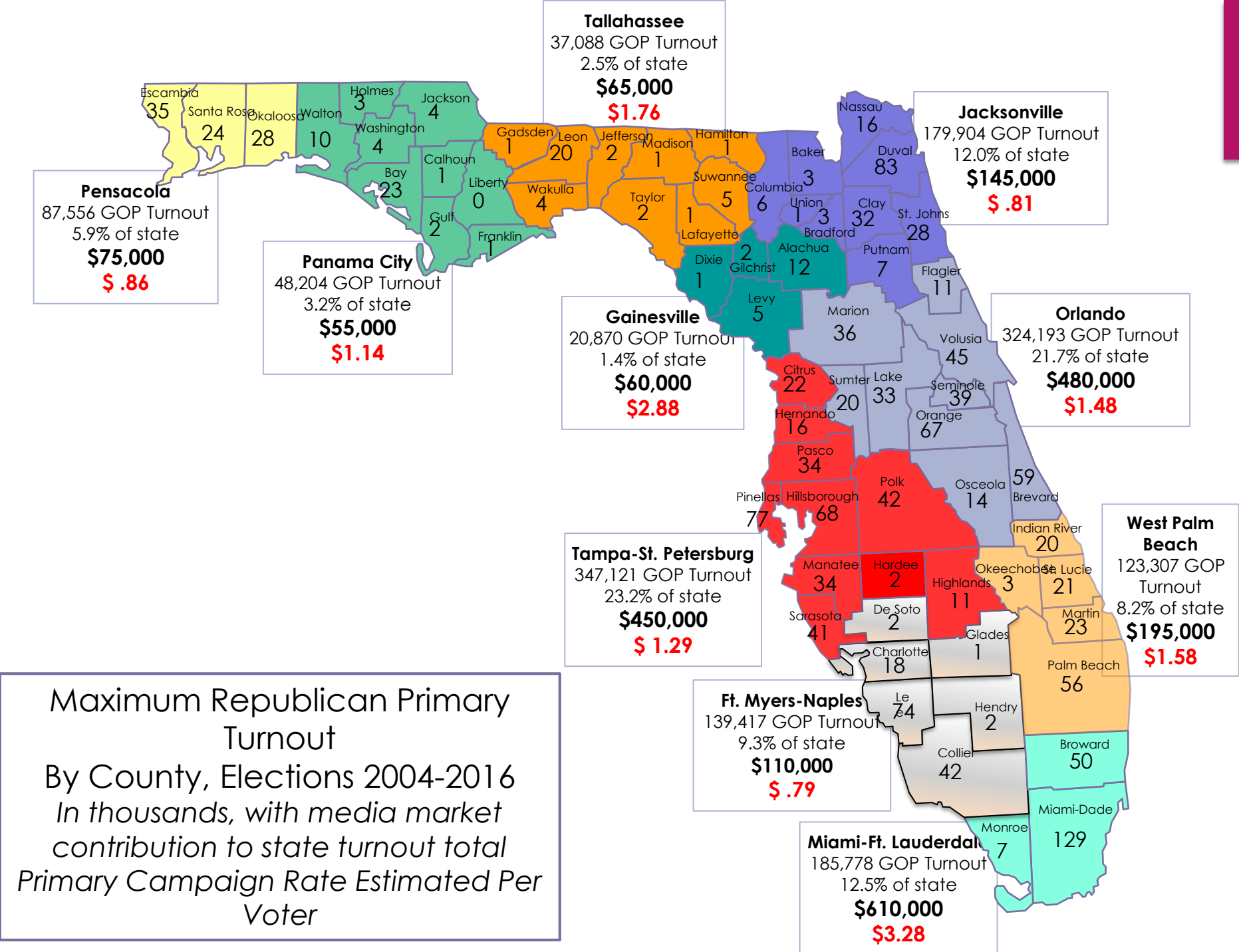
Florida Population Explosion

Florida Population Since 1860



The “States” of Florida.

- ▶ Florida is not a state. At best it is a loosely functional confederation:
- ▶ North Florida (Iowa)
- ▶ Orlando (Kentucky)
- ▶ Tampa/SW Florida (Colorado)
- ▶ Gold Coast (Oregon)
- ▶ The Miami City-State (Nevada)



How Obama/Trump Won

	Obama 08	Obama 12	Trump 16
North Florida	-260,531	-308,039	-345,291
I-4 Corridor	43,121	-62,230	-254,066
Fort Myers	-68,498	-103,676	-143,904
SE Florida	522,458	548,254	629,644

Florida's Political Performance

- ▶ Florida's demographics are evolving – and quickly.
- ▶ Last four top of the ticket race: Largest margin of victory was 1.1%
- ▶ Since 1992 – 50 million votes – two parties separated by 20K votes.
- ▶ Virtually no 'swing counties' anymore.

Florida 2018

US Senate Race

Governorship

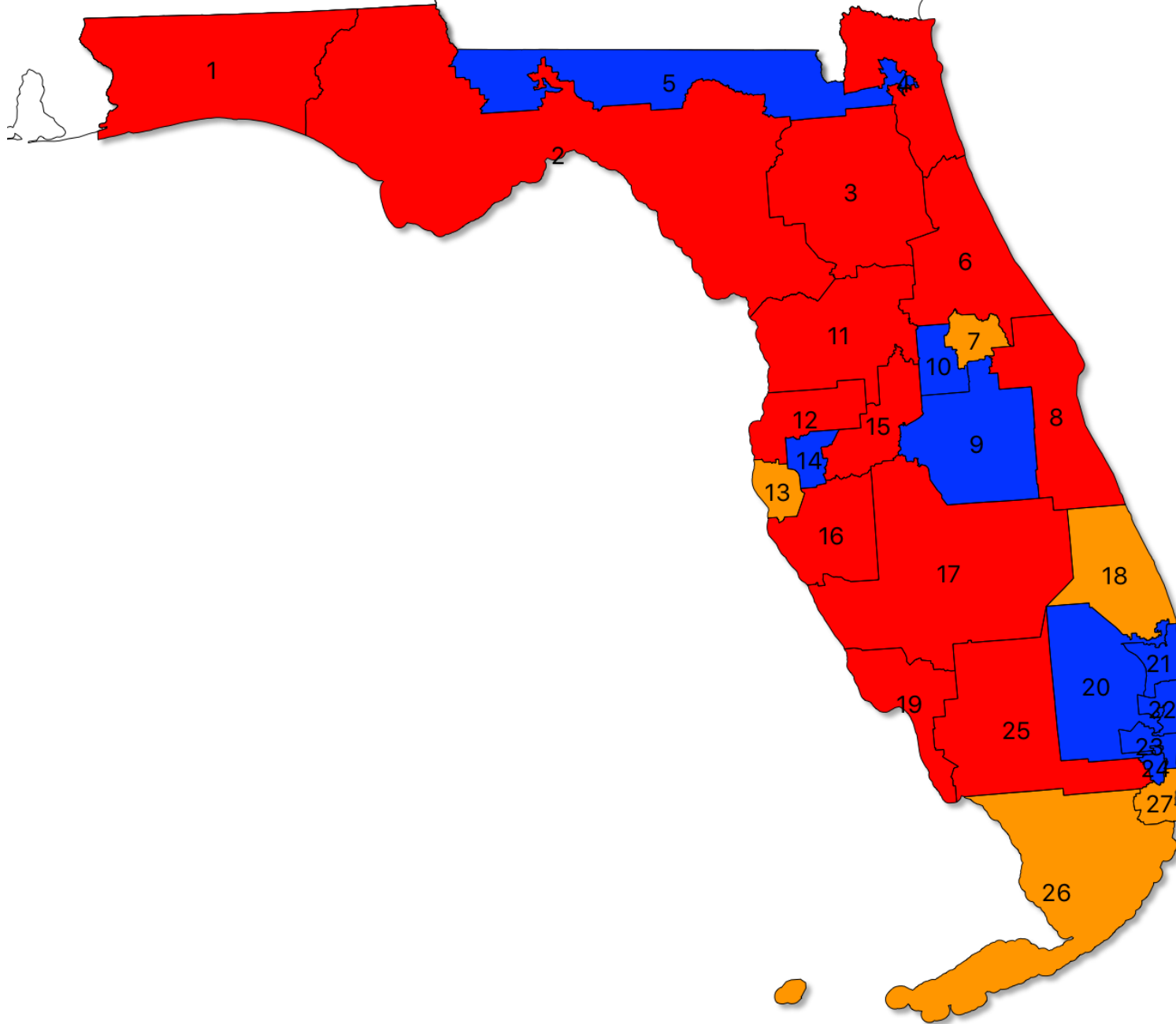
Cabinet

5-7 Competitive Congressional Districts

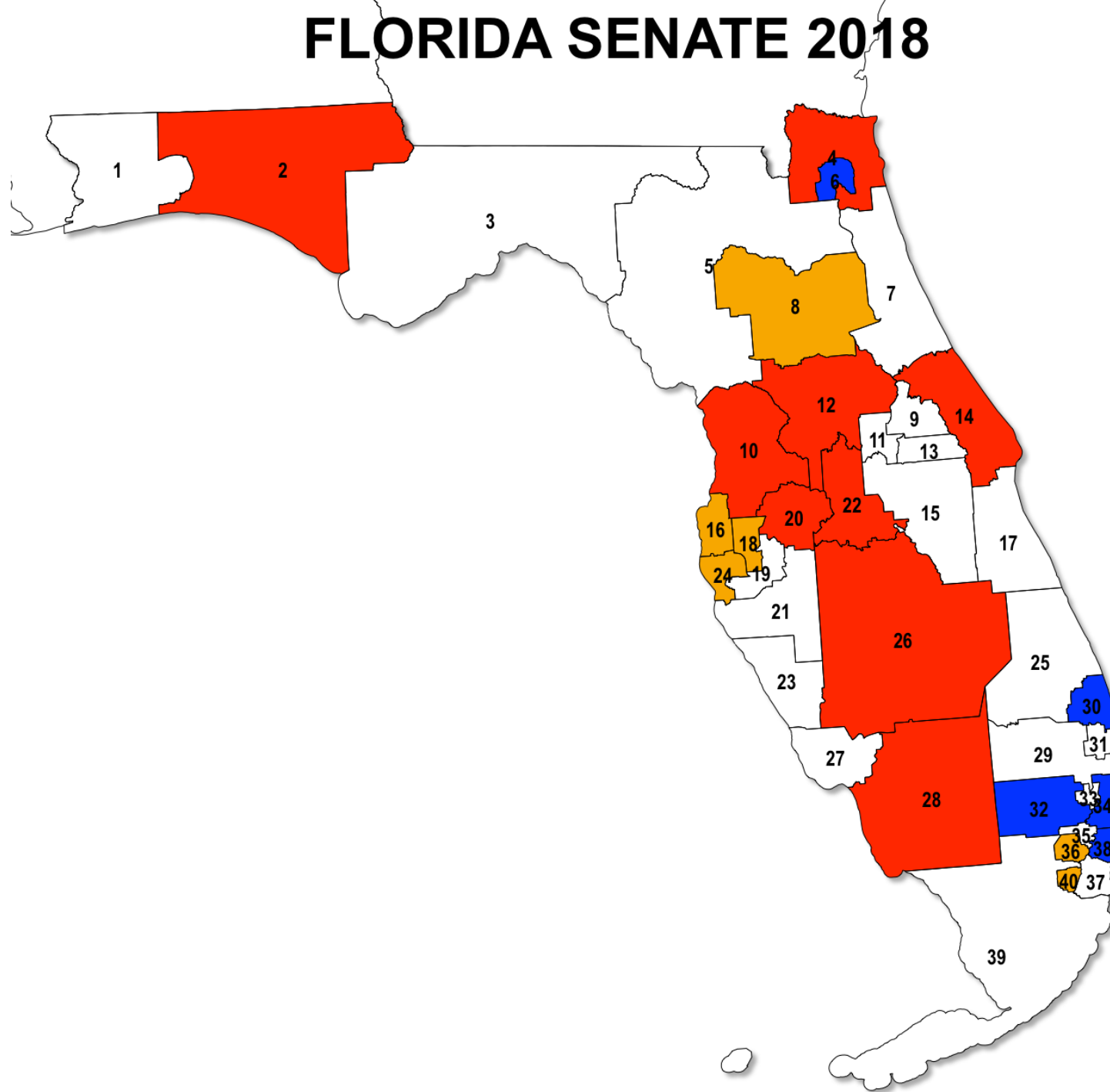
5-7 Competitive State Senate Races

20+ Swing State House Seats

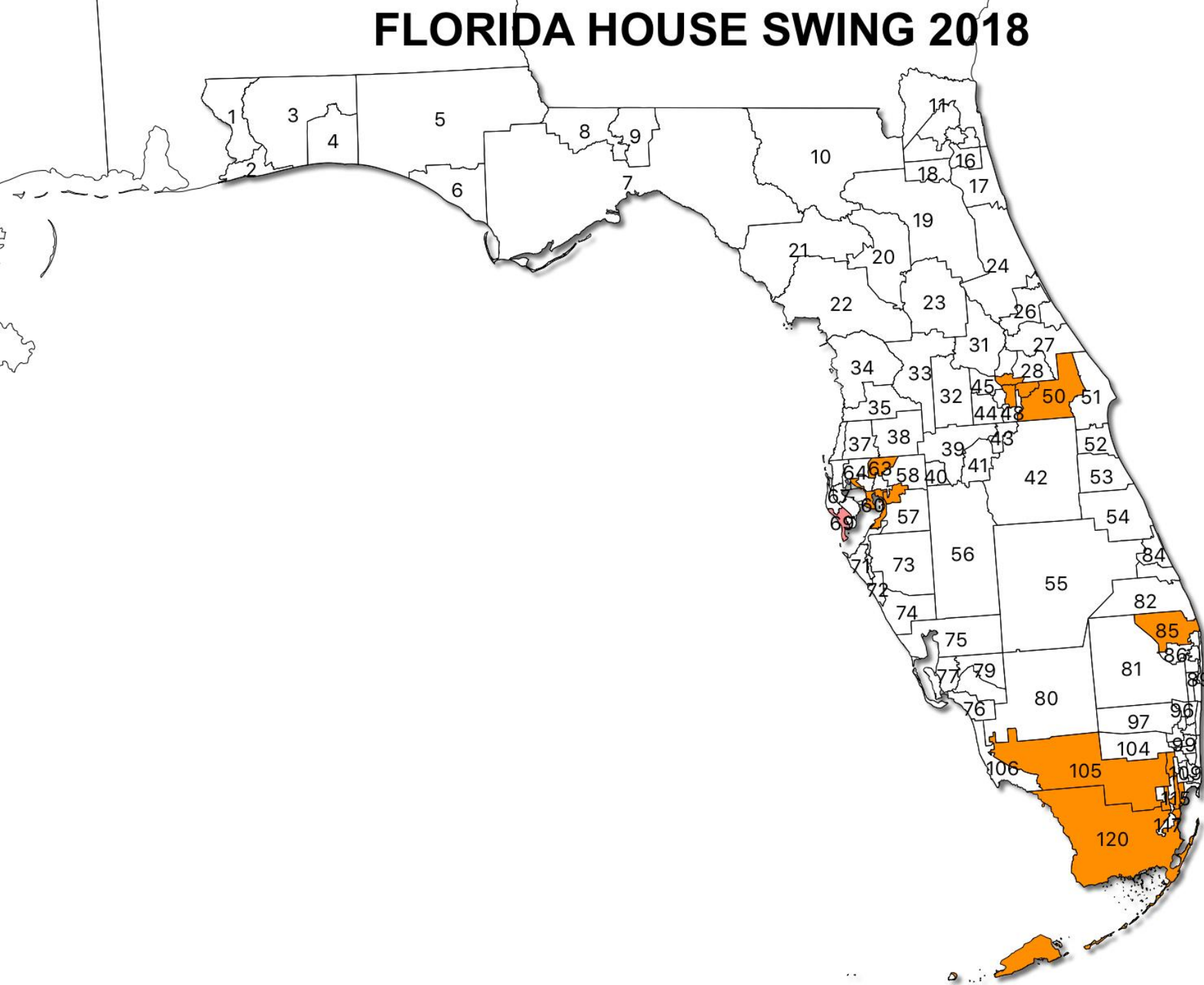
FLORIDA CONGRESSIONAL 2018



FLORIDA SENATE 2018



FLORIDA HOUSE SWING 2018



Florida by 2030

- ▶ Solidly “majority-minority”
- ▶ 24.6 million residents
- ▶ 12 million non-Hispanic whites
- ▶ 7.2 million Hispanics
- ▶ 4 million Blacks, with Caribbean Americans growing faster than African Americans.
- ▶ Asians are one of fastest growing population segments, particularly in Orlando
- ▶ Orlando will remain the fastest growing region, and by 2030, almost catch Miami and Tampa for a 3-way tie in terms of the largest media market.