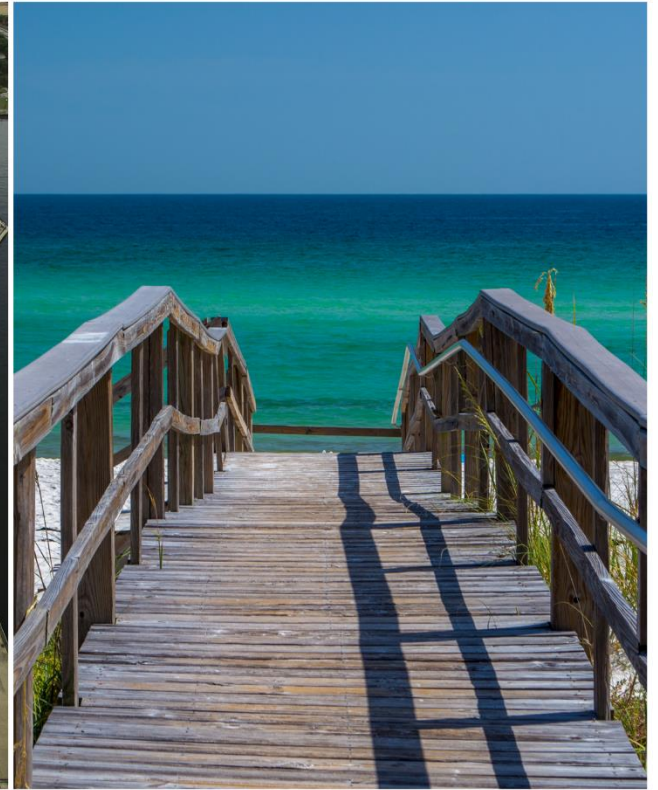


EMERALD COAST REGIONAL COUNCIL COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

2022-2026





Comprehensive Economic Development Strategy, June 2021

Funding for this report is provided by the U.S. Economic Development Administration

Additional copies of this report may be obtained by contacting:

Emerald Coast Regional Council

4081 E. Olive Rd.

Pensacola, FL 32514

850-332-7976 | ecrc.org

Steering Committee

The Emerald Coast Regional Council would like to thank the following steering committee members for the input and guidance provided during the 2022 major update:

- Nathan Sparks, Okaloosa County EDO
- Danita Andrews, Florida West EDA
- Ted Everett, Washington County EDO
- Verdell Hawkins, Florida Power & Light
- Nicole Gislason, UWF Haas Center
- Shane Chadwick, Florida's Great Northwest
- Rebecca Ferguson, Port of Pensacola

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List of Acronyms

ACS	American Community Survey	EPA	Environmental Protection Agency
AFB	Air Force Base	EPCRA	Emergency Planning and Community Right to Know Act
ARPA	American Rescue Plan Act	FAC	Florida Association of Counties
ATMS	Advanced Traffic Management Systems	FAMU	Florida Agricultural and Mechanical University
B2S	Build to Scale Program	FAQ	Frequently Asked Questions
BEA	Bureau of Economic Analysis	FAST	Fixing America's Surface Transportation Act
BEBR	Bureau of Economic and Business Research	FCC	Federal Communications Commission
BIC	Business Innovation Center	FDEM	Florida Division of Emergency Management
BLS	Bureau of Labor Statistics	FDEP	Florida Department of Environmental Protection
CARES	Coronavirus Aid, Relief, and Economic Security Act	FDOT	Florida Department of Transportation
CBEP	Choctawhatchee Bay Estuary Program	FEMA	Federal Emergency Management Agency
CCMP	Comprehensive Conservation & Management Plan	FGDL	Florida Geographic Data Library
CDBG	Community Development Block Grant	FGNW	Florida's Great Northwest
CEDS	Comprehensive Economic Development Strategy	FHWA	Federal Highway Administration
CRF	Coronavirus Relief Funding	FLOC	Florida League of Cities
DEO	Department of Economic Opportunity	FRDAP	Florida Recreation Development Assistance Program
EC-ARC	Emerald Coast Area Resilience Collaborative	FSU	Florida State University
ECFRPC	East Central Florida Regional Planning Council	FTA	Federal Transit Administration
ECRC	Emerald Coast Regional Council	FTP	Florida Transportation Plan
EDA	Economic Development Administration	HHRP	Hurricane Housing Recovery Program
EDD	Economic Development District	HLMP	Hurricane Loss Mitigation Program
EDO	Economic Development Organization	HUD	U.S. Department of Housing & Urban Development
		IRC	Integrated Recovery Coordination

ITEN Innovation, Technology, Entrepreneurship, and Network

ITS Intelligent Transportation Systems

LEHD Longitudinal Employer-Household Dynamics

LEPC Local Emergency Planning Committee

LMI Low to Moderate Income

MPO Metropolitan Planning Organization

MSA Metropolitan Statistical Area

NOAA National Oceanic and Atmospheric Administration

OLF Outlying Landing Field

P2R2 Public Private Regional Resiliency Committee

PPBEP Pensacola and Perdido Bays Estuary Program

R&D Research & Development

R2P2 Recovery and Resiliency Partnership Projects

REMI Regional Economic Models, Inc.

RIDER Resilient Infrastructure & Disaster Response

RLF Revolving Loan Fund

RREA Regional Recreation Economy Alliance

RTP Recreational Trails Program

SASJBEP St. Andrew and St. Joseph Bays Estuary Program

SBDC Small Business Development Center

SBTDC Small Business & Technology Development Center

SHIP State Housing Initiatives Partnership

SIS Strategic Intermodal Systems

STEM Science, Technology, Engineering, and Math

SWOT Strengths, Weaknesses, Opportunities, and Threats

TAZ Traffic Analysis Zone

TBRPC Tampa Bay Regional Planning Council

TIME Transportation Interface for Modeling Evacuations

TPO Transportation Planning Organization

REEF Research Engineering & Education Facility

USDA United States Department of Agriculture

USGS United States Geological Survey

UF University of Florida

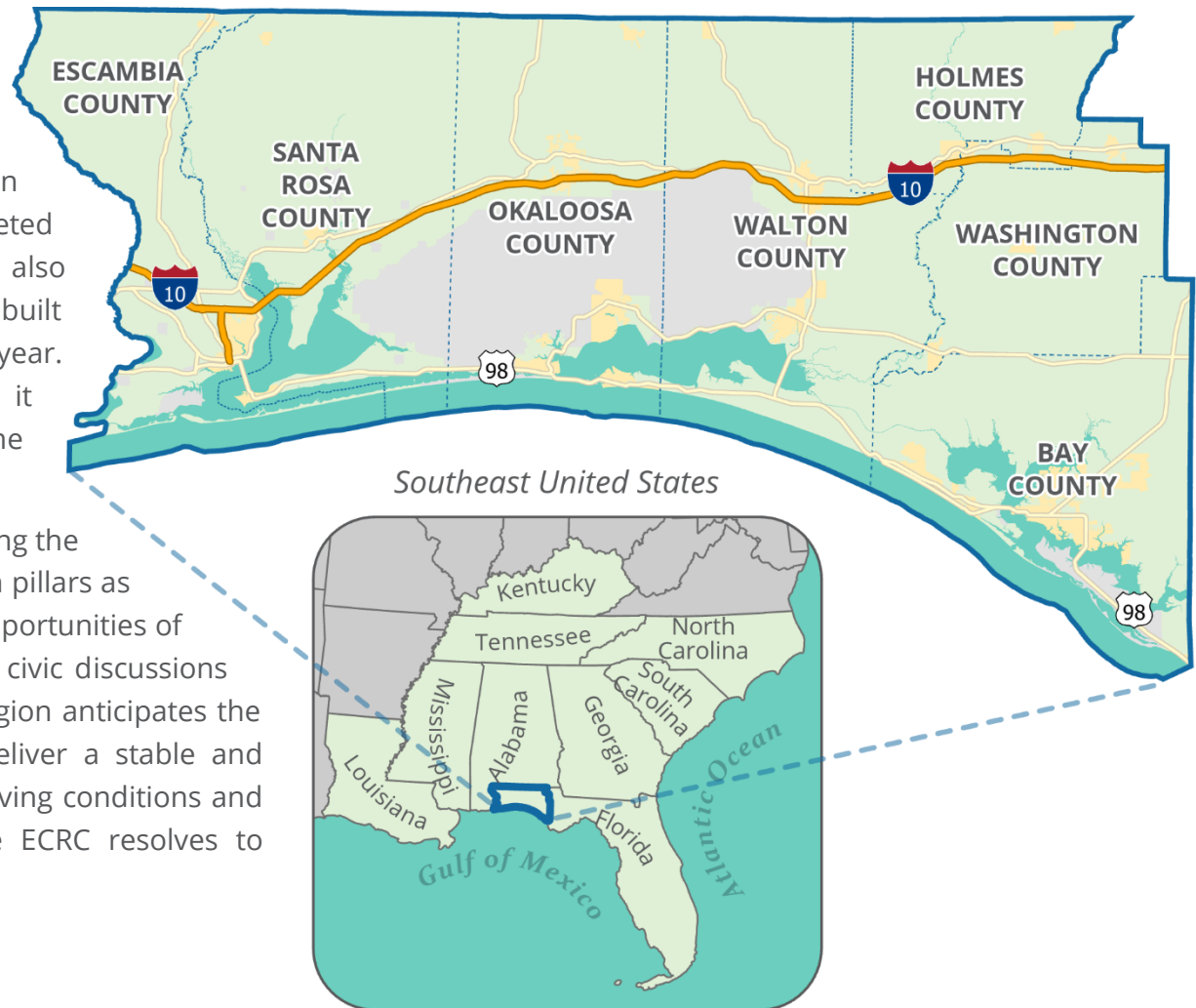
UWF University of West Florida

Executive Summary

Since 1964, the Emerald Coast Regional Council (ECRC) has directed planning efforts impacting activities that involve interactions crossing jurisdictional boundaries. In 1995, the ECRC, then known as the West Florida Regional Planning Council, was designated an Economic Development District (EDD) by the U.S. Department of Commerce's Economic Development Administration (EDA). To maintain the status as an EDD and continue receiving grants and technical assistance from the EDA, a Comprehensive Economic Development Strategy (CEDS) is required. This document is updated annually and undergoes major updates (rewrites) every four years to encompass new developments and strategies for the region. An effective CEDS consists of a data-driven participatory process including the multifaceted leadership of a steering committee. The CEDS is also informed by community outreach and partnerships built through the range of ECRC programming during the year. This plan is unique from other regional plans as it focuses on the specific economic conditions of the region.

The CEDS focuses on several different aspects affecting the regional economy. This document draws upon seven pillars as focus areas, reviewing the specific challenges and opportunities of each. With the allied purpose articulated in several civic discussions that informed the creation of this document, the region anticipates the next five years to support secure job creation, deliver a stable and diversified regional economy, and improve overall living conditions and success for residents throughout the region. The ECRC resolves to accomplish the goals of this plan.

Figure 1. Emerald Coast Location



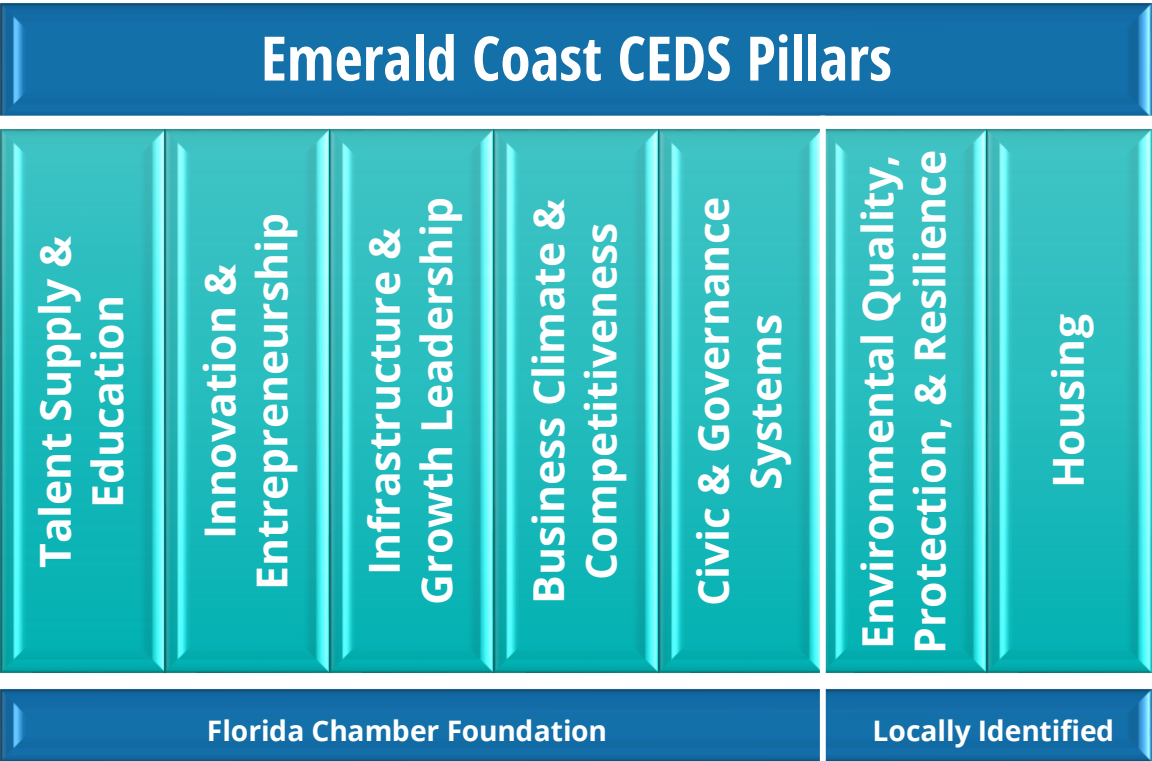
The Pillars

This document focuses on seven pillars – five of which originate from the Florida Chamber Foundation’s “Six Pillars of Florida’s Future Economy” and two which are locally identified pillars. The five pillars from the Florida Chamber include Talent Supply & Education, Innovation & Entrepreneurship, Infrastructure & Growth Leadership, Business Climate & Competitiveness, and Civic & Governance Systems. (The sixth Chamber Pillar, Quality of Life & Quality Places, is addressed throughout this document rather than in a separate section, as each subject plays a critical role in improving the overall quality of life in Northwest Florida.) The two locally identified pillars are Environmental Quality, Protection, & Resilience, and Housing.

The Department of Economic Opportunity’s Florida Strategic Plan for Economic Development also applies the Florida Chamber Foundation’s six pillars statewide with the vision for Florida to be a top performing economy recognized as the world’s best place to live, learn, play, work, and do business. Many cross-cutting strategies align with the Emerald Coast’s regional initiatives to create multimodal, interconnected trade and transportation systems; revise permitting and regulatory processes to meet evolving business needs; and develop vibrant, healthy communities.

The Florida Transportation Plan (FTP) also uses the Florida Chamber Foundation’s six pillars to plan toward collaborative efforts for transportation solutions that support quality places, efficient and reliable mobility, and energy conservation. With a historic role of providing land use review assistance as well as staffing the region’s three transportation planning organizations, the ECRC is distinctively positioned to actualize the FTP’s implementation measure of coordinating transportation and land use decisions.

Figure 2. The Seven Emerald Coast CEDS Pillars



Summary Background

Demographic & Economic Profile of the Emerald Coast Region

The Emerald Coast Region includes seven counties - Escambia, Santa Rosa, Okaloosa, Walton, Holmes, Washington, and Bay. There are two unique characteristics that unite the region, creating a strong sense of place, identity, and pride. These characteristics heavily influence the regional story in terms of workforce, commute patterns, large industry sectors, and infrastructure capacity.

The first characteristic is the U.S. military. The Emerald Coast Region is home to six Air Force and Navy installations, housing over 56,000 military personnel. These include NAS Pensacola, NAS Whiting Field, Hurlburt Field, Eglin Air Force Base, NSA Panama City, and Tyndall Air Force Base. Defense activities generated roughly 186,689 jobs, \$21 billion in gross regional product and accounted for 26% of the region's economy in 2020. (Enterprise Florida, 2022)



The Gulf of Mexico Coastline

Source: ECRC

The government industry cluster, which encompasses the military, is one the largest clusters found within the Emerald Coast Region. As many of the installations are aviation-focused, the Emerald Coast has a rapidly growing cluster of aerospace and defense-related firms. These companies include 15 aircraft manufacturers, nine aircraft engine and engine parts manufacturers, and nine guided missile and space vehicle manufacturers. While the military's vast presence shows itself mostly through the aerospace and defense cluster, it impacts each industry sector within the region. Any decrease in military spending would certainly cause a ripple effect throughout the regional economy. Considering that risk, it is crucial to evaluate other economic diversification strategies to minimize such a possibility, while continuing to advance plans that build on the region's unique strengths affiliated with defense.

The second major characteristic is the breathtaking Gulf of Mexico, which impacts the region's way of life both environmentally and economically. Five of the region's seven

counties (Escambia, Santa Rosa, Okaloosa, Walton, and Bay) have coastlines along the Gulf of Mexico, drawing thousands of visitors annually which contributes to a bustling tourism and hospitality industry cluster. These same counties also border at least one of several bay systems, including Perdido River and Bay, Pensacola Bay, Choctawhatchee River and Bay, and Saint Andrew/Saint Joseph Bays. The local economies rely on annual revenues from bed taxes as well as other direct and indirect impacts of tourism spending. Unfortunately, there are numerous threats associated with dense coastal development and pollution impacts within the watershed that the region must manage through

Figure 3. Major Features of the Emerald Coast Region



thorough comprehensive resiliency strategies. The health of the watershed, coastal, and riparian ecosystems is pivotal to the overall wellbeing of the region and local economy. Protecting these resources not only helps the region maintain itself as a premiere tourism destination, but also enriches resiliency to natural disasters by protecting the built environment.

With a 2020 Census population of 1,017,065, the Emerald Coast contains roughly 5% of Florida's population. The region's population has increased by 13.2% since 2010. Of the counties, Walton County and Santa Rosa County have seen the greatest increase in population between 2010 and 2020 with a 36.8% and a 24.2% increase respectively. (2010/2020 Census)

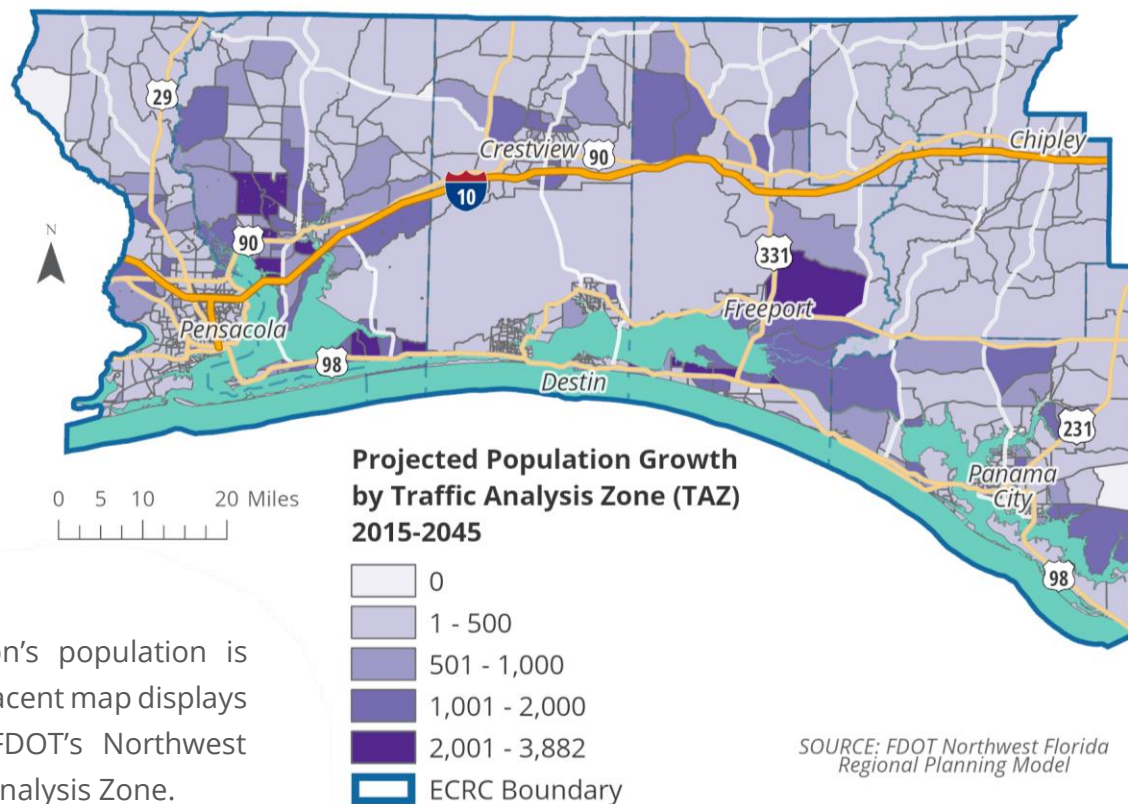
According to BEBR's mid-level projections, the region's population is anticipated to grow to 1,227,000 people by 2045. The adjacent map displays the projected 2015-2045 population growth (from FDOT's Northwest Florida Regional Planning Model) distributed by Traffic Analysis Zone.

The Emerald Coast has a strong percentage of active and able workers with approximately 26.4% of the population between 25-44 years old. This population also serves as a major asset to promote business recruitment efforts. Around 16.9% of the region's population is age 65 or older, uniquely impacting the economy and built environment. This population contributes less to sales and gross receipt tax revenue, more to property tax revenue, and less to all other revenue sources. (ACS 2016-2020)

Within the region, there are three Metropolitan Statistical Areas (MSAs) and 34 municipalities. The largest of municipalities include Pensacola in Escambia County, Crestview in Okaloosa County, and Panama City in Bay County. Holmes, Walton, and Washington Counties are primarily rural, with the other four counties having rural characteristics in the northern portion of their jurisdictions. Commuting patterns establish that rural areas of the region support the employment needs of the coastal areas.

Within the Emerald Coast Region, there are 29,245 business establishments and 366,443 employees (BLS 2020). Of the region's employed population, 62.1% have white collar occupations, 20.6% have blue collar occupations, and 17.3% have service occupations (Esri, 2021). According to the U.S. Bureau of Labor Statistics, the unemployment rate for the region was 5.8% in 2020.

Figure 4. Projected Population Growth by Traffic Analysis Zone, 2015-2045



In the region, the median home value is approximately \$231,019 (Esri, 2021) and the median household income is around \$55,487 (ACS 2016-2020). The expensive real estate market, primarily found along the southern portions of the coastal counties, makes it cost-prohibitive for many retail and hospitality sector employees to afford housing, explaining the longer commute patterns seen from northern areas of those counties. Northern portions of the counties primarily depict the lower range of median household incomes, as shown by the lighter colored census tracts on the adjacent map.

Figure 6 shows the percentages of employees living in the Emerald Coast that are employed within (85.4%) and outside of (14.6%) the Region. The commute patterns of workers crossing county lines

Figure 5. Median Household Income by Census Tract

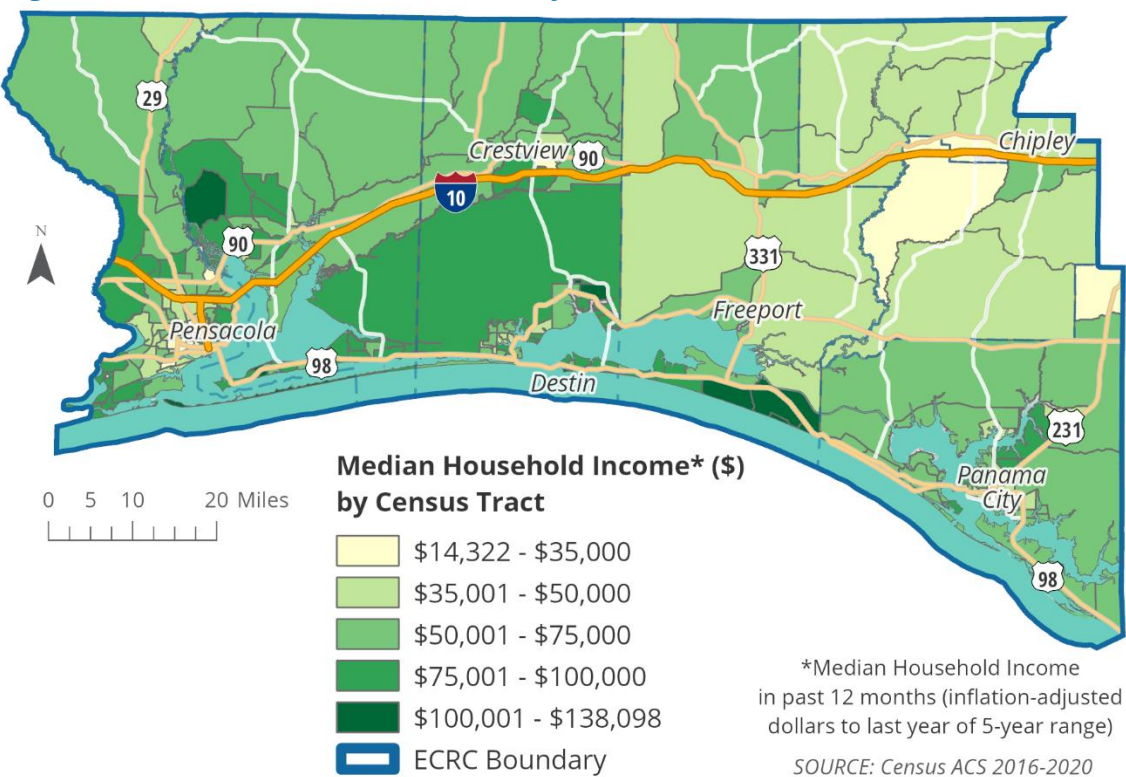
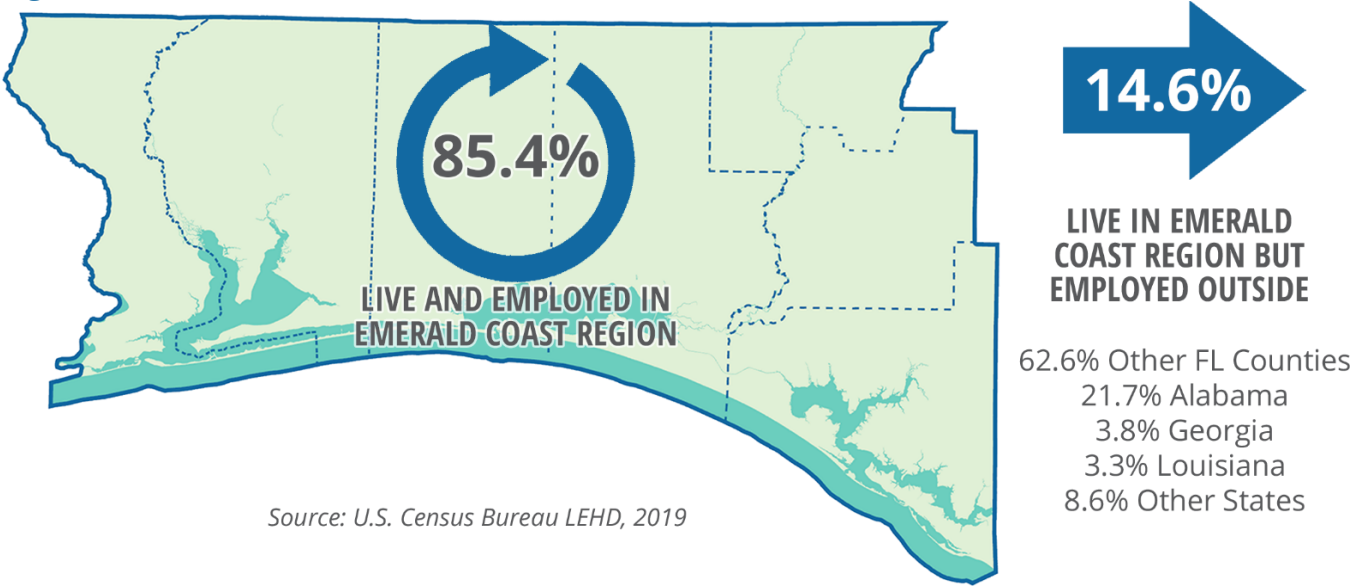


Figure 6. Emerald Coast Commuter Flows



for industry sectors is further broken down in Table 1. Santa Rosa, Holmes, and Washington Counties experience the highest outflow of workers, many of which commute across county lines to serve employment centers in Escambia, Okaloosa, and Bay Counties.

Table 1. Commute Patterns by County and Industry Sector, 2019

	Bay	Escambia	Holmes	Okaloosa	Santa Rosa	Walton	Washington
Worker Inflow	23,656	58,556	1,987	33,606	19,180	15,449	4,216
Worker Outflow	19,804	35,343	5,064	27,921	45,924	13,669	6,936
Net Inflow/Outflow	3,852	23,213	-3,077	5,685	-26,744	1,780	-2,720
By NAICS Industry Sector*							
Agriculture, Forestry, Fishing and Hunting	-0.9%	-0.6%	-1.4%	-1.3%	-0.3%	-1.3%	-0.1%
Mining, Quarrying, and Oil & Gas Extraction	-0.3%	-0.6%	-0.2%	-0.5%	-0.4%	-0.2%	-0.2%
Utilities	-2.3%	1.9%	-1.4%	-1.4%	-1.1%	1.7%	-1.4%
Construction	21.7%	8.9%	-6.0%	4.6%	-5.1%	3.8%	-8.1%
Manufacturing	5.8%	4.2%	-11.5%	7.6%	-7.5%	-4.7%	-4.9%
Wholesale Trade	-1.3%	4.2%	-4.6%	-2.6%	-3.7%	-1.4%	-5.0%
Retail Trade	13.6%	12.1%	-19.7%	14.8%	-9.3%	11.8%	-17.9%
Transportation and Warehousing	-4.2%	-1.0%	-4.6%	-3.7%	-3.9%	-1.6%	-5.2%
Information	-0.7%	-0.2%	-0.9%	0.0%	-0.7%	-1.0%	-1.6%
Finance and Insurance	-0.9%	11.8%	-2.8%	0.4%	-9.8%	-3.8%	-3.3%
Real Estate and Rental and Leasing	4.6%	0.4%	-1.8%	1.7%	-2.0%	9.1%	-3.2%
Professional, Scientific, & Technical Services	5.5%	2.8%	-8.2%	37.7%	-9.9%	-11.5%	7.3%
Management of Companies & Enterprises	-2.3%	1.5%	-0.9%	-1.5%	-1.9%	-1.2%	-1.4%
Administration & Support, Waste Mgt.	13.0%	5.7%	-8.8%	-2.0%	-5.9%	1.3%	-8.6%
Educational Services	1.4%	5.1%	-1.9%	3.7%	-5.7%	-1.8%	-4.8%
Health Care and Social Assistance	12.1%	24.9%	-7.1%	3.6%	-16.8%	-6.2%	-5.9%
Arts, Entertainment, and Recreation	0.2%	-0.8%	-0.9%	2.0%	-1.2%	-0.7%	-0.8%
Accommodation and Food Services	6.8%	8.7%	-13.8%	7.6%	-9.5%	34.7%	-13.0%
Other Services (excl. Public Administration)	-0.5%	3.2%	-2.7%	2.6%	-2.9%	1.3%	-4.0%
Public Administration	-1.9%	1.4%	-0.7%	0.6%	-2.6%	0.9%	3.3%

Source: US Census Bureau, LEHD OnTheMap (2019)

*The industry share of workers either commuting into (green) or out of (red) the county

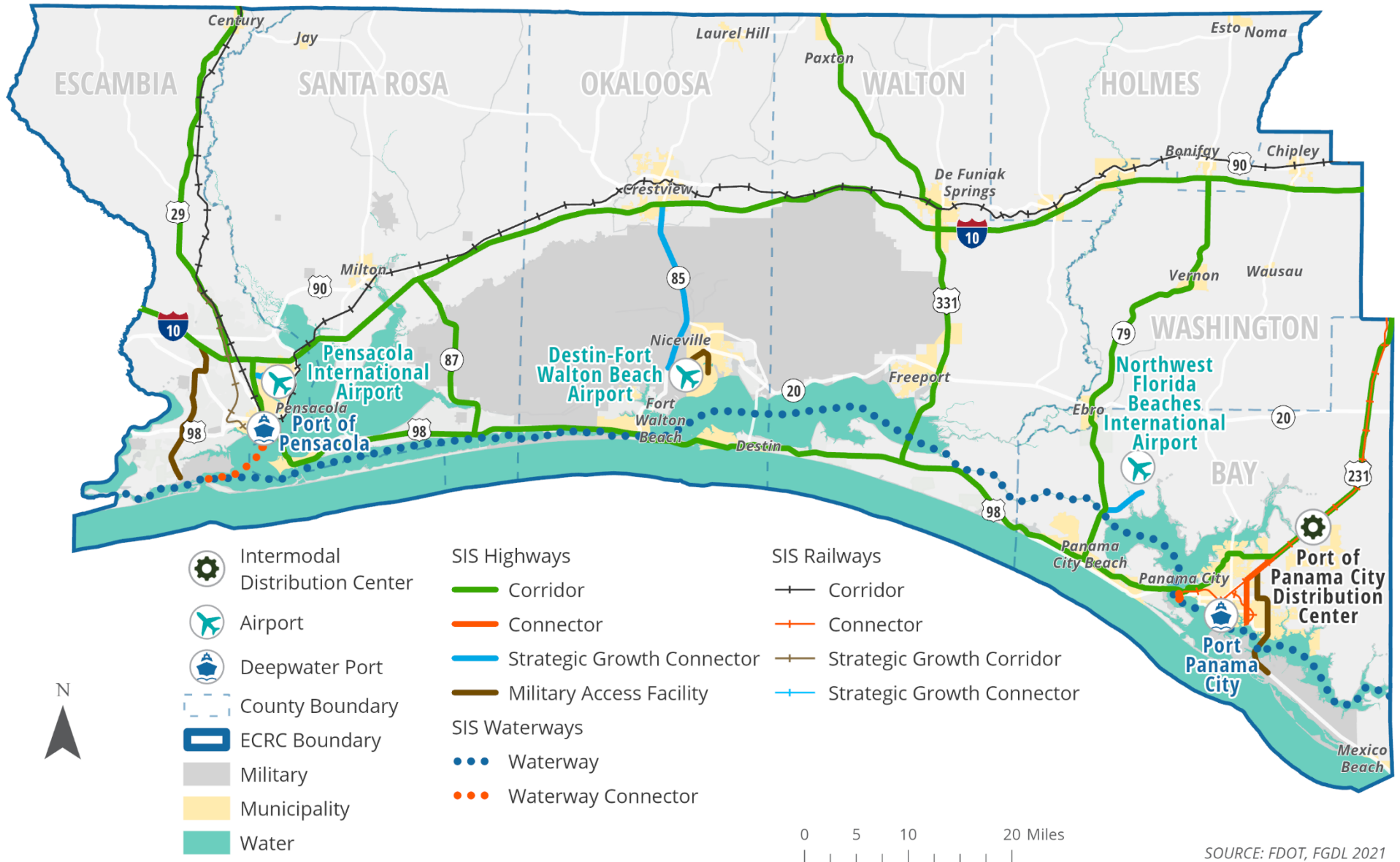
The Emerald Coast Region's transportation network is a gateway to and from Florida for both people and commercial freight. The network consists of three commercial airports, two deepwater/barge ports, Interstate 10, and Florida Gulf & Atlantic Railroad. Table 2 describes the critical transportation infrastructure within our region.

Table 2. Transportation Infrastructure

Infrastructure	Description	Location
Pensacola International Airport	Owned by the City of Pensacola, this airport offers seven airline carriers and serves over 2.2 million passengers annually. flypensacola.com	Pensacola, Escambia County
Northwest Florida Beaches International Airport	Offers service from major carriers with direct flights to 12 major cities and offers a 10,000-ft runway allowing for the landing of large aircraft. iflybeaches.com	Bay County
Destin-Ft. Walton Beach Airport	Serves over 1.5 million passengers annually with over 50 flights daily. Major carrier include Delta, United, American, Allegiant, and Southwest. flyvps.com	Okaloosa County
Port Panama City	A deep-water port located in a Foreign Trade Zone ranking highest in the country for handling copper. The Port specializes in the flexible shipping of commodities, handling everything from forest products to molasses for shippers and consignees in break bulk or containers.	Panama City, Bay County
Port of Pensacola	This is a deep-water port located in a Foreign Trade Zone that supports import and export operations range from aggregate, cement, lumber, and paper to wind turbine generators. The Pensacola Port currently has approximately 25 acres for additional development opportunities.	Pensacola, Escambia County
Interstate 10	I-10 is a U.S. interstate traversing east/west through six of seven counties in the region. A designated Strategic Intermodal System (SIS) Corridor, it is the main vehicular transportation corridor to Alabama and southern Florida.	Escambia, Santa Rosa, Okaloosa, Walton, Holmes, and Washington County
Florida Gulf & Atlantic Railroad	This railroad runs parallel to I-10, offers connections to Class I CSX and Norfolk Southern rail lines, and is intersected by several short railroads such as Alabama and Gulf Coast Railway (AGR) and Bay Line Railroad (BAYL).	All seven counties

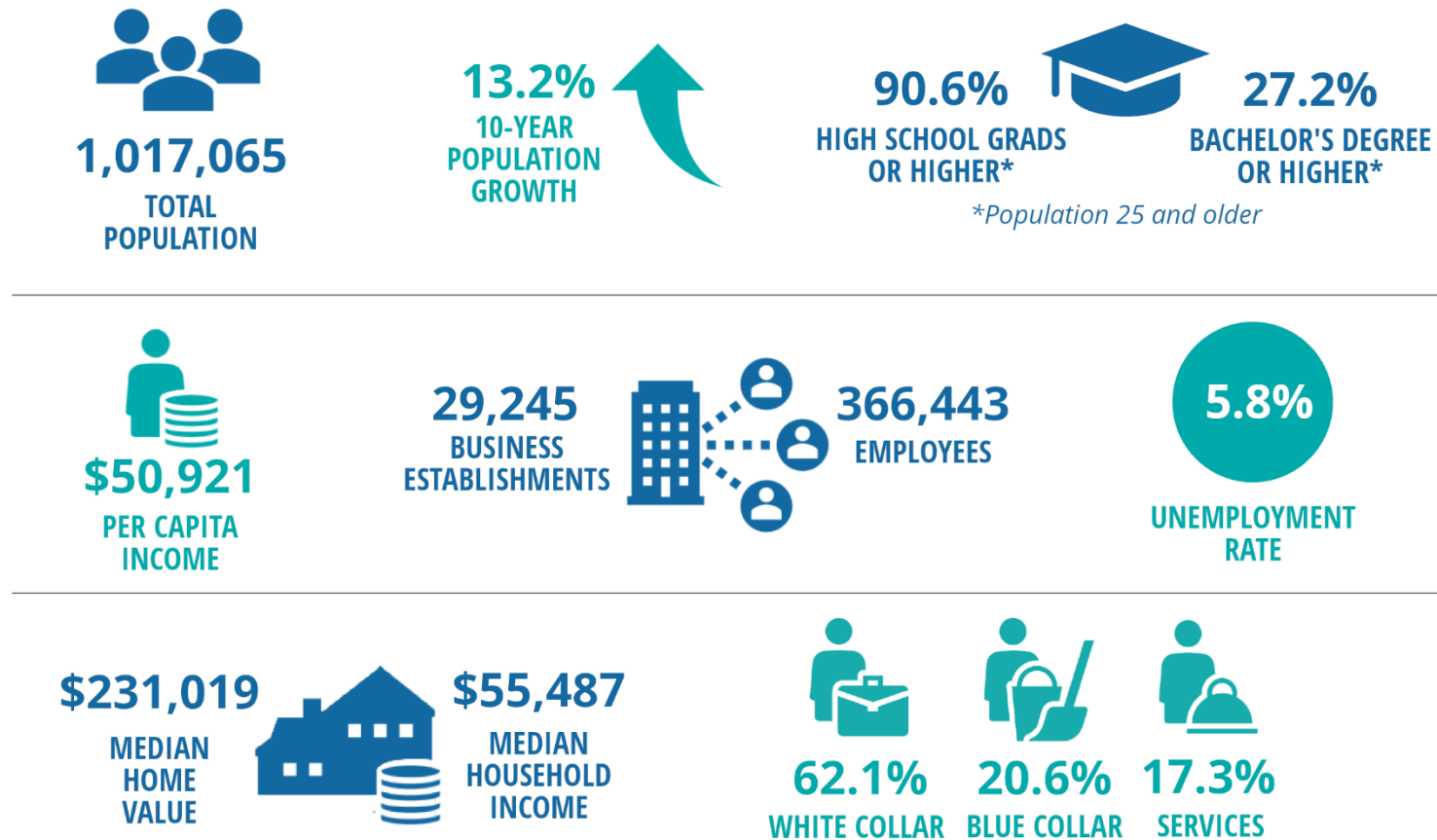
The Strategic Intermodal System (SIS) is Florida's high-priority network of transportation facilities important to the state's economy and mobility. Projects identified on the SIS receive priority for transportation capacity investments and are a crucial focus for implementing the Florida Transportation Plan. A key strategy will be aligning transportation and economic development decisions to increase benefits of strategic investment in the SIS. Facilities in Figure 7 are surfacing as a state interest and encourage an economic opportunity of statewide significance.

Figure 7. Emerald Coast Transportation Network



SOURCE: FDOT, FGDL 2021

Figure 8. Data Summary



SOURCE: 2020 Census (Total Population, Growth), Census ACS 2016-2020 Estimates (Education, Household Income), BEA 2020 (Per Capita Income), BLS 2020 (Business Establishments, Employees, Unemployment); Esri 2021 Estimates (Home Value, Occupation)

The SWOT & Steering Committee

To gain a clear picture of the region, conducting a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis is critical for the development of the CEDS. The SWOT not only serves as a representation of the region as it currently stands but also as a vision for the future.

As part of the CEDS development, ECRC staff reviewed the previously identified strengths, weaknesses, opportunities, and threats of the region for relevancy to the current state of the region and generated several new overall priorities. Between June and July 2021, the ECRC conducted a SWOT survey of regional stakeholders to gauge priorities in each category. The survey asked four questions related to identified strengths, weaknesses, opportunities, and threats, as well as offered a write-in option for additional feedback. Each question was multiple choice, listing many priorities related to the category, and asked the participant to choose their top five priorities in each category. The ECRC compiled the results and created a SWOT graphic which displays the top five or six priorities within each category to show major takeaways from the survey.

In August 2021, the ECRC held a Steering Committee meeting to discuss the results of the SWOT survey. While most Steering Committee members agreed that the priorities identified were on target, a few concerns were highlighted. The first concern was housing availability. The Committee agreed that while there has been considerable new housing development within the region, there is still a great need for housing at all price points. Without sufficient housing availability in the region, further growth will be stifled, limiting future economic growth opportunities.

Another concern for the region that surfaced during discussion was the lack of childcare options available – an issue not identified by the survey directly. Several members brought up this issue in conjunction with several large incoming business developments that will attract many new workers and their families. To accommodate a large, thriving workforce suited to fit the economic needs of the region, adequate childcare options must be offered for worker families.

Figure 9 depicts the top priorities identified by the SWOT survey and the additional weakness discussed by the Steering Committee.

Figure 9. SWOT Analysis Priorities



STRENGTHS

Natural amenities, beautiful beaches, and an attractive lifestyle

Research and development, testing, talent, and technology development with region's military installations

Transportation infrastructure

Areas of affordable rural land available for industrial/commercial development

Industry specialization assets



WEAKNESSES

Lack of affordable workforce housing

Difficulty attracting skilled talent

Limited/antiquated infrastructure

Regional prevailing wages are not competitive

Lack of a region-wide transportation mobility system

Lack of available childcare programs



OPPORTUNITIES

Strengthening regional economy beyond military and tourism

Investments in public infrastructure

Strengthening cradle to career education system

Intra-regional and interstate partnerships

BP oil spill settlement funds due to economic damages

Expanding demand-driven workforce development initiative able to accommodate large employers



THREATS

External shocks that disrupt the tourism sector

Aging/non resilient infrastructure

Proximity to neighboring states/markets with significant resources to win competitive projects

Inability to align resources beyond traditional geographic boundaries

Potential attacks/disruptions to water/utility distribution

Reduced military investment in the region

Strategic Direction

How will the Emerald Coast Region push toward the economic growth and achievement it hopes to see in the next five years? The basis of this plan is acknowledging that a regional perspective is essential to the Emerald Coast to accomplish its goals, both now and in the future. ECRC



Boats Docked at Palafox Pier in Pensacola

Source: ECRC

and its partners will work to build regionalism through the seven pillars in this CEDS. There is correlation and overlap between many of the goals, strategies, and action steps planned, as the success of one may impact or guide another.

This CEDS identifies distinct leadership coalitions that already exist to promote economic development initiative underscored under each goal. The strategies under each goal are developed to fit the capacity and reach of ECRC and will be carried out through the Implementation Action Plan. As mentioned earlier in this document, the critical goal of resiliency is emphasized in each pillar. To further economic resilience progress, the ECRC will continually seek funding opportunities relating to resilience and diversification projects and programs. Through the identification of these goals and strategies, along with a focus on implementation and outcomes, the Emerald Coast conveys a vision for the best of what this region can be.

COVID-19 Impact

In February 2020, a novel coronavirus began to spread across the United States. In mid-March, the World Health Organization declared the virus a pandemic – what we now know as the COVID-19 pandemic. In response, federal, state, and local governments implemented policies limiting travel. The Centers for Disease Control and Prevention issued guidelines to prevent the gathering of large groups and advised that citizens distance themselves six feet apart or more. On April 1, 2020, Florida Governor Ron DeSantis issued a 30-day stay at home order, closing most of the state's non-essential businesses. While restaurants and other essential businesses continued operation, sit-down service was prohibited, and capacity limitations were put in place. In mid-March 2020, ECRC staff began working remotely to avoid the spread of COVID-19 among employees and has continued to offer this option since.

In July 2020, ECRC contracted with East Central Florida Regional Planning Council (ECFRPC) to analyze COVID-19 impacts in the region, specifically for the Disaster Resilience Plan. While the results have been included in that plan, they have also given us a clearer understanding of how a decline in annual business sales can impact the economy of the Emerald Coast Region.

ECFRPC's analysis focused on six key industries: retail trade; transportation and warehousing; information; arts, entertainment, and recreation; accommodations and restaurants; and other personal services. To determine economic impacts, four indicators were used: total employment, output/sales, personal income, and gross domestic product. Losses were based on the REMI PI+ forecast. The REMI PI+ model estimated that the region could expect to lose approximately 72,000 positions in 2020 due to the pandemic. The region was also expected to lose \$8.6 billion in output and greater than \$2.8 billion in personal income. The Emerald Coast's gross domestic product was to be reduced to 12%, equating to a little more than \$5 billion. Of

the counties in the Emerald Coast region, Escambia, Bay, and Okaloosa were predicted to be the most impacted – accounting for roughly 75% of economic losses in the region. Rather than perceiving these results as a loss of current economic capacity, they should be viewed as potential growth that will never be reached due to the COVID-19 closures.



Walton County Beaches Closed from COVID

Source: NWFL Daily News, 2020

In June 2021, another economic impact analysis was conducted for the ECRC by Tampa Bay Regional Planning Council's (TBRPC) economic impact analyst. This analysis focused on other impacts of the pandemic such as changes in mobility, employment, and taxable sales, unlike the previous economic impact analysis which focused on overall economic losses spurred by the COVID-19 Pandemic.

This most recent economic impact analysis reviewed overall changes in jobs throughout the pandemic through Quarter 1, 2021. Between the peak of the COVID-19 crisis (Quarter 1 and 2, 2020), Emerald Coast jobs decreased by 39,000 (-9%). However, from Quarter 2, 2020 through Quarter 1, 2021, over 50,000 (13%) jobs have returned. Table 4 shows the changes in jobs by quarter and county. As depicted in this table, all counties in the region have approximately 11,643 (3%) more jobs at the end of Quarter 1, 2021 than before the COVID-19 shutdown in Quarter 2, 2020.

Table 4. Change in Jobs by Quarter and County

County	Q1/20		Q2/20		Q3/20		Q4/20		Q1/21		Total Job Change	
Bay	627	1%	-5,036	-6%	4,113	6%	-1,646	-2%	5,969	8%	4,027	5%
Escambia	-307	0.2%	-14,726	-10%	10,124	8%	362	0.3%	5,486	4%	939	1%
Holmes	26	0.4%	-677	-10%	449	7%	34	1%	199	3%	31	0.5%
Okaloosa	1,291	1%	-8,285	-9%	4,860	6%	-1,055	-1%	6,167	7%	2,978	3%
Santa Rosa	-347	-0.4%	-8,223	-10%	5,793	8%	209	0.3%	4,482	6%	1,914	2%
Walton	414	1%	-2,790	-9%	1,571	6%	-268	-1%	2,694	9%	1,621	5%
Washington	20	0.2%	-956	-10%	642	8%	-38	-0.4%	465	5%	133	1%
Total	1,724	0.4%	-40,693	-9%	27,552	7%	-2,402	-1%	25,462	6%	11,643	3%

Source: U.S. Bureau of Labor Statistics, 2020-2021. <https://www.bls.gov/lau/#tables>. From *The COVID-19 Pandemic in the Emerald Coast and Florida: An Economic Impact Assessment*, May 2021.

The analysis also discussed changes in mobility as an economic indicator during COVID-19. Social distancing was highly encouraged to minimize the spread of the virus, and as a response, a major shift in mobility occurred between May 2020 and May 2021. Using cell phone location history data collected by Google Maps and made publicly available by Google, the changes in transit station use along with trips to

Table 3. Summary of Economic Losses Spurred by COVID-19 Pandemic by County

County	Total Employment	Output/Sales	Personal Income	Gross Domestic Product
Bay	-14,931	-\$1,640,000,000	-\$570,000,000	-\$967,000,000
Escambia	-24,148	-\$3,131,000,000	-\$811,000,000	-\$1,847,000,000
Holmes	-487	-\$41,000,000	-\$19,000,000	-\$25,000,000
Okaloosa	-15,027	-\$1,836,000,000	-\$432,000,000	-\$1,096,000,000
Santa Rosa	-9,987	-\$1,111,000,000	-\$641,000,000	-\$664,000,000
Walton	-6,351	-\$714,000,000	-\$336,000,000	-\$424,000,000
Washington	-969	-\$85,000,000	-\$35,000,000	-\$51,000,000

Source: REMI PI+ Florida Counties and Border States V2.4.1, from *Economic Impact of the COVID-19 Pandemic*, prepared for ECRC by ECFRPC, September 2020

retail and recreation, grocery and pharmacy, workplaces, and residential destinations were all tracked. The mobility changes were compared to the baseline month – the normal value for that month calculated by Google based on median values from previous periods before the COVID-19 shutdown. In May 2020, the Emerald Coast saw an overall decrease in mobility. The most notable mobility changes were in visits to parks, workplaces, retail and recreation, and residential destinations. While most counties showed a decrease in trips to workplaces, as well as retail and recreation, trips to parks and residential locations saw an increase, with parks seeing increases as high as 71% in Okaloosa and Walton Counties and increases as high as 9% for residential in Escambia, Okaloosa, and Walton Counties. In May 2021, many counties in the Emerald Coast were seeing increases in mobility to destination categories such as retail and recreation, grocery and pharmacy, parks, and transit stations. While workplaces were still seeing a loss in mobility compared to the base month, there was less of a reduction in May 2021 to this category than in May 2020.

Table 5. Google Mobility Change by Percentage for May 2020 & 2021 in the U.S., Florida, & ECRC Counties

Category	Year	Nation	State	Counties						
		United States	Florida	Bay	Escambia	Holmes	Okaloosa	Santa Rosa	Walton	Washington
Retail & Recreation	2020	-27%	-30%	-0.5%	-13%	*	-8%	3%	-5%	-10%
	2021	-5%	-9%	31%	-0.2%	*	17%	9%	37%	5%
Grocery & Pharmacy	2020	-4%	-12%	-11%	5%	*	6%	11%	8%	16%
	2021	3%	-2%	33%	6%	*	17%	16%	30%	17%
Parks	2020	22%	-26%	45%	62%	*	71%	71%	39%	*
	2021	36%	-7%	93%	52%	*	149%	49%	103%	*
Transit Stations	2020	-38%	-48%	-16%	-19%	*	-26%	*	-3%	*
	2021	-20%	-19%	33%	6%	*	53%	*	34%	*
Workplaces	2020	-37%	-35%	-21%	-27%	-18%	-26%	-26%	-22%	-20%
	2021	-23%	-22%	-9%	-22%	-10%	-16%	-12%	-9%	-10%
Residential	2020	13%	13%	7%	9%	*	9%	9%	6%	*
	2021	4%	4%	1%	3%	*	1%	3%	-1%	*

Source: Google Mobility, 2020-2021. <https://www.google.com/covid19/mobility>. From *The COVID-19 Pandemic in the Emerald Coast and Florida: An Economic Impact Assessment*, May 2021.

*Not enough data

In response to the pandemic, ECRC applied for and was awarded EDA CARES Act funding from the Economic Development Administration (EDA). This funding allowed for a Disaster Recovery Coordinator role to be created within the ECRC. The task of this role has been to encourage a more resilient economy within the region with undertakings such as creation of a small business toolkit aimed at assisting chambers of commerce and Main Streets in offering guidance to local businesses impacted by COVID-19. Beyond the toolkit, other efforts have stemmed from this funding including development of a business continuity webinar to assist small businesses, as well as offering additional technical assistance and GIS services to communities within the region.

CARES Act funds were also allocated to the region through the Florida Housing Finance Corporation in the form of Coronavirus Relief Funding (CRF). The ECRC administered those funds for Jackson, Washington, Holmes, and Walton counties. The funds were used to aid COVID-19 impacted households with rental, mortgage, and utility payments.

Opportunity Zones

The Opportunity Zone Program was created by the Federal Tax Cuts and Jobs Act of 2017 to encourage businesses, developers, and financial institutions to invest in low-income census tracts, focusing on economic development and job creation. The census tract areas were designated as Qualified Opportunity Zones by the U.S. Department of Treasury in 2018, and are found in all 50 states, five territories, and in the District of Columbia. Florida has 427 Qualified Opportunity Zones with 15 located in the Emerald Coast region. The nomination process for Florida involved reviewing over 1,200 recommendations submitted by local governments, regional planning councils, nonprofits, developers, investors, and other entities. The final nominations were based upon comprehensive review and statistical analysis of population, poverty, unemployment rates, and other economic indicators within the proposed zones.

Challenges of Opportunity Zones

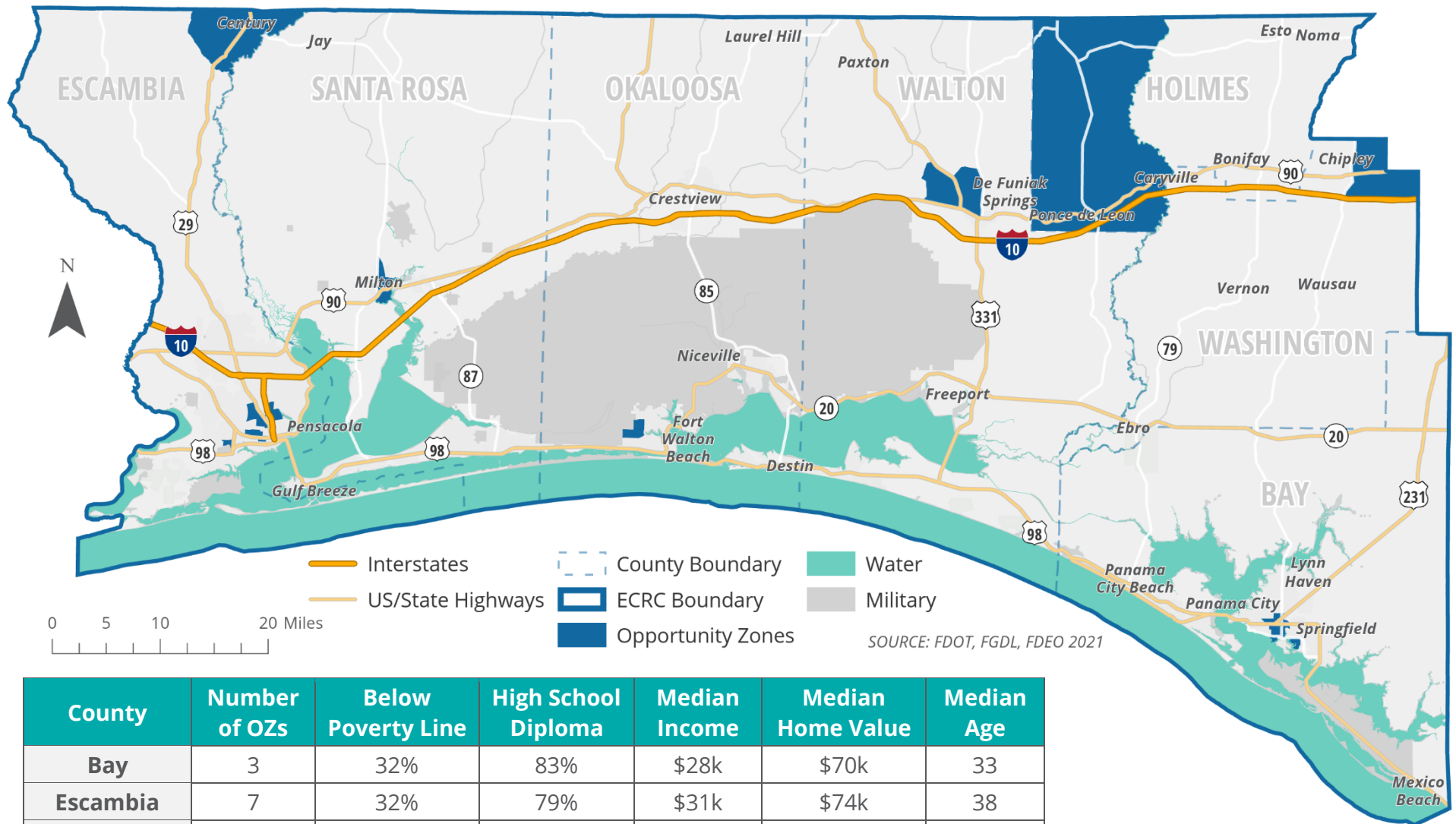
One of the primary issues the opportunity zones face, particularly in more rural counties such as Holmes, Washington, and Walton, is location. For example, Okaloosa County's lone opportunity zone is adjacent to the Fort Walton Beach Commerce & Technology Park. It does not, however, include the park itself nor any industrial land and is primarily residential, rendering the land difficult to develop. Pensacola's opportunity zones (Escambia County) are also mostly located in residential areas with minimal multifamily and commercial areas within. To develop these spaces would require the purchase of many individual properties, potentially making it difficult to leverage the benefits of this program. In Walton and Holmes Counties, opportunity zones are in rural areas too far from municipalities to thrive, despite incentives offered by the Opportunity Zone Program. In Century (Escambia County), the designated opportunity zone has more property available for development, however, the limited population creates a higher financial risk beyond the tax benefits.

Strategies & Solutions

While there are limited options for solving the location issues of established opportunity zones within our region, there are other considerations to be made for ensuring that opportunity zones benefit the overall economy as well as the residents within the zones.

To further enhance economic development within the Emerald Coast's opportunity zones, critical conversations must occur. Community stakeholders, local government leaders, investors, and developers must get on the same page and work together to engage responsibly with this tool. The economy created by these zones should not only benefit the region at large, but the residents within the zones. In some cases, opportunity zones have experienced a cultural and economic disconnect between investors and the communities they are targeting. To balance these priorities, there must be strategic engagement, collaboration, and inclusive planning to establish incentives and guardrails for investment; strategies for gathering metrics on community impact; and reporting on outcomes in an accessible and transparent manner. It is important to consider the impact investments could have on these communities beyond bringing in economic value.

Figure 10. Emerald Coast Opportunity Zones



SOURCE: FDOT, FGDL, FDEO 2021

County	Number of OZs	Below Poverty Line	High School Diploma	Median Income	Median Home Value	Median Age
Bay	3	32%	83%	\$28k	\$70k	33
Escambia	7	32%	79%	\$31k	\$74k	38
Holmes	1	20%	80%	\$44k	\$94k	46
Okaloosa	1	17%	90%	\$51k	\$214k	39
Santa Rosa	1	21%	89%	\$39k	\$95k	35
Walton	1	22%	81%	\$37k	\$110k	40
Washington	1	30%	84%	\$37k	\$92k	34

SOURCE: OpportunityDb
(Census ACS 2015-2019 Estimates)

Economic Resilience

To promote a prosperous regional economy, the region's economic base must be able to prevent, withstand, and rapidly recover from major shocks such as natural disasters, pandemics, and manmade events. While some definitions of economic resilience focus on the ability to quickly recover from a disturbance, our regional definition should consider three attributes: the ability to swiftly recover from an event, the ability to withstand an event, and the ability to avoid an event overall. Establishing true economic resilience within a regional economy depends on the area's ability to anticipate risk, evaluate how a risk may impact key assets, and build a responsive capacity. The ECRC has taken on several projects to address different aspects of creating regional economic resilience. While economic resilience is addressed specifically in this section, it is also woven throughout each pillar with strategies related to economic resilience found within each.



Ponderosa Drive in Pensacola following a heavy rain event

Source: Katie King/PNJ (2014)

Resilience Plan

In 2018, the ECRC was awarded an EDA Disaster Supplemental grant for the development of an economic resilience plan for the region. To help inform the plan and ensure relevancy to the region, ECRC undertook a series of community engagement events. These events included the Economic Recovery and Resilience Workshop (March 2019); Business Assessment Survey (February 2019-March 2020); and Disaster Recovery Planning, Technical Assistance, and Grant Writing. These efforts served to engage the community in conversations related to long-term economic recovery and resilience, as well as determine local recovery needs, particularly in the wake of Hurricane Michael. These events guided the creation of the Emerald Coast Regional Economic Resilience Plan.

Completed in 2020, the Emerald Coast Regional Economic Resilience Plan serves as a post-disaster recovery blueprint and follows elements from FEMA's National Disaster Recovery Framework in addition to critical components of its Long-Term Recovery Planning Process. The Plan roughly follows some of the pillars found in the CEDS, as well as a few other locally identified subjects, and expands on opportunities and risks in each category. As well as identifying regional assets, the Plan also recognizes and prioritizes projects, programs, and actions that encourage and accelerate economic and social recovery while creating a resilience and post-disaster vision. The Plan discusses past natural disasters such as Hurricane Michael and the current COVID-19 pandemic, as well as the related fiscal impacts. To offer a deeper dive into the fiscal impacts, the Economic Resilience Plan includes an economic impact analysis of "Hurricane Impacts in Northwest Florida" conducted by the University of West Florida's Haas Center, as well as an economic impact analysis of the effects of the COVID-19 pandemic on the regional economy. The Plan also includes HAZUS mapping of deterministic and probabilistic hurricanes in the region, best practices and strategies, and information on the community engagement process as previously mentioned.



Hurricane Michael damage in Mexico Beach

Source: ECRC, 2018

Business Toolkit for COVID-19 Impacted Businesses

In 2020, ECRC was awarded a grant from the EDA CARES Act funding the position of Disaster Recovery Coordinator. This position focuses on assisting local governments and other regional entities with identifying potential resiliency, mitigation, and economic recovery projects that could be implemented, as well as offering technical assistance to those entities. As part of this effort, ECRC created a toolkit for small businesses with the intent to aid with COVID-19 response and recovery. The resources in the toolkit include general small business resources, business continuity planning links, reemployment and unemployment resources, business loan information, FAQs on COVID-19, health trackers, impact surveys, regional health department contact information, vaccination information, grants and short-term compensation availability, and several other resources related to the COVID-19 pandemic.

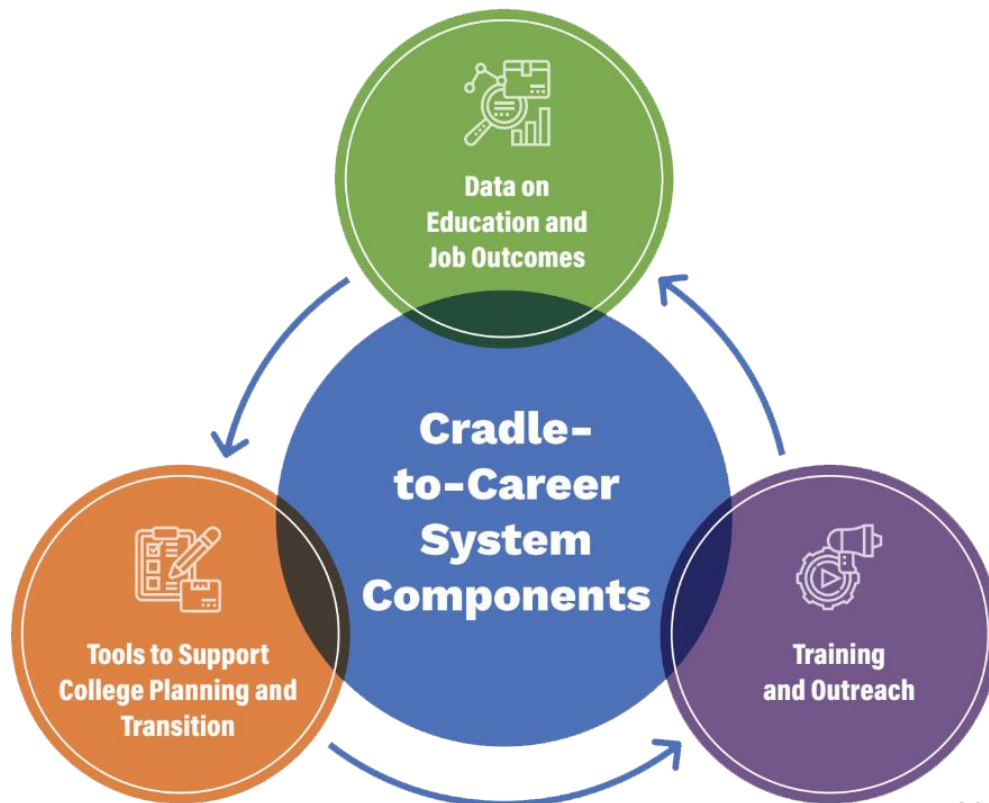
Business Continuity Workshop

To promote a strong regional economy, businesses must be prepared for any disruptions to operations that may occur. Living in a region that regularly experiences the threats and destruction of hurricanes, tornadoes, and flooding, and is now experiencing a global pandemic, business continuity efforts are more important than ever, and continuity plans have proven to be vital for the survival of small businesses. According to FEMA, 40% of businesses do not reopen after a disaster and another 25% fail within one year, rendering continuity planning invaluable. As part of the Disaster Recovery Coordinator Role, the ECRC, in partnership with FloridaMakes, hosted a virtual workshop on business continuity planning for small businesses. The workshop was a two-part series with the first part outlining the importance of business continuity in relation to disaster recovery and resilience, followed by a separate presentation explaining how to craft a continuity plan for small businesses.

Talent Supply & Education

Goal: Support educational programs, activities, and partners which encourage development of programs and opportunities that will meet the region's educational and workforce needs.

Northwest Florida's public schools have a wide array of options and programs with a career focus in K-12 and beyond. Most of the Emerald Coast's counties have a higher graduation rate than the state average, which assists in maintaining a good quality of life and attracting families to relocate or stay within the region. This also assists in preparing to allow successful businesses to locate and expand within the Emerald Coast region, as it is important to plan for the workforce to meet current and future market needs. Escambia County is working toward a newer program, Cradle to Career (C2C), which assists children and families with

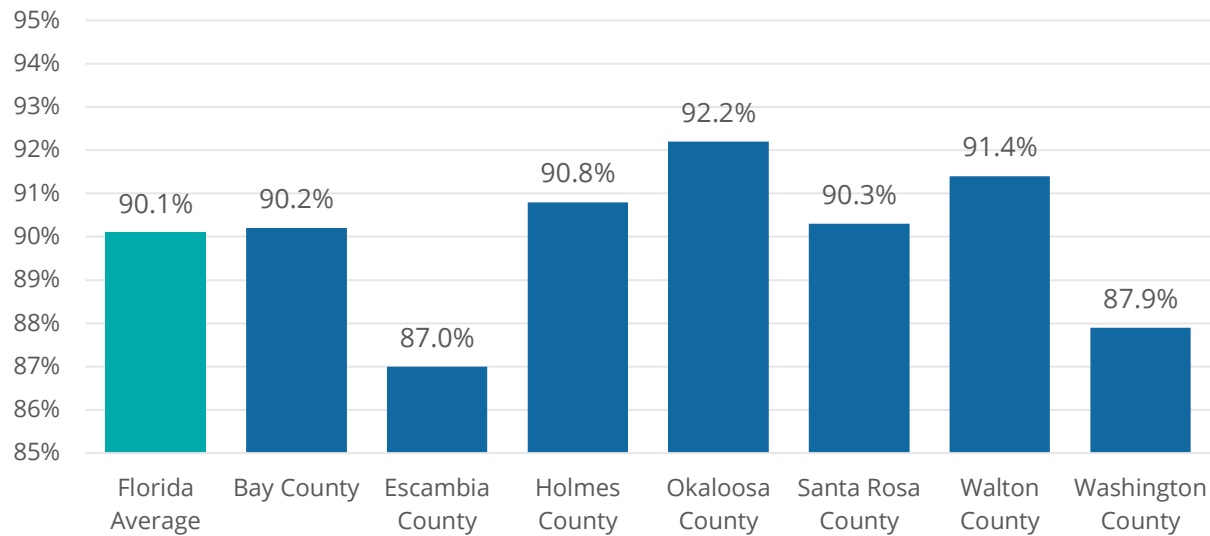


School Children with iPads

Source: Wikimedia Commons

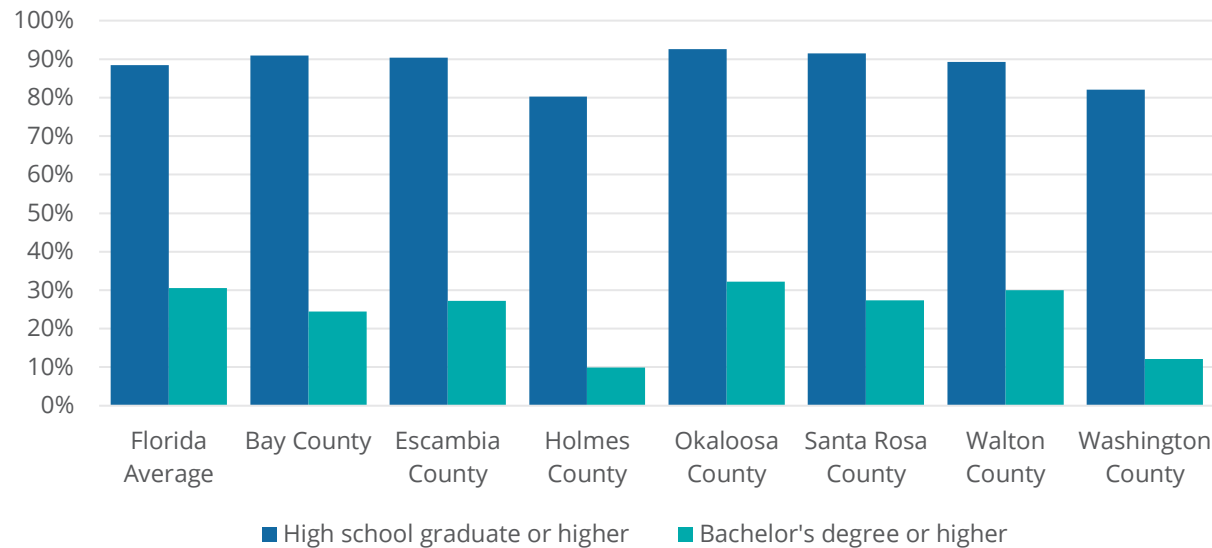
financial and educational tools to aide with developmental screenings, kindergarten readiness, elementary school success, high school achievement and graduation, college or trade school graduation and beyond. Other programs in the region include CHOICE (Career High Skill Occupational Initiative for Career Education) and Career Academies. The region should continue to promote programs that improve equitable access to specialized curricula, ensuring students of all socio-economic levels have equal opportunities.

Figure 11. High School Graduation Rates



SOURCE: 2020-21 Florida Department of Education (FDOE) as of 02/08/22

Figure 12. Educational Attainment (25 years and older)



SOURCE: 2016-2020 American Community Survey 5-Year Estimates

Educational institutions like the University of West Florida (UWF) in Pensacola are producing degrees and innovative environments to respond to regional employment needs like engineering, logistics, and healthcare. Technical schools like Tom P. Haney College in Panama City and Emerald Coast Technical College in DeFuniak Springs are aligning their curriculums with the manufacturing, construction, and technology skills needed in the region like plumbing, pipe fitting, welding, aviation mechanics, marine service, and computer systems information. Some technical schools in the region are now offering dual enrollment classes to high school students as well.

With seven military installations across the Emerald Coast region, military spouses and former military entering the workforce are huge assets. Employ Florida works with local Career Source Centers to help transitioning military with training and entering the civilian workforce. This process bridges the skills developed in the military to the needs of the local labor market. If local firms can access existing talent and provide second-career opportunities in the region, then more high-skilled retired military personnel will choose to continue their civilian life in Northwest Florida. An example of one of the region's programs is Career Source Okaloosa Walton (CSOW). CSOW has a specialized program comprised of

veteran staff that works closely with the military installations and attends a briefing for separating military personal. They also specifically work with former military, providing them with training or connections needed to place them within area businesses. Also, many of the local career centers work with military spouses on resumes, interviewing, and referrals in a one-on-one environment that assists with job placement in a new community.

Military installations also serve as a catalyst for attracting clusters of research activity, defense contractors, and aviation and aerospace-related companies and suppliers. Universities like Florida State's Panama City Regional Campus is a nationally recognized Tier-1 research institution. FSU Panama City has a mission to create opportunities by providing access to high-quality undergraduate and graduate programs with the assistance of research through military and business partners.

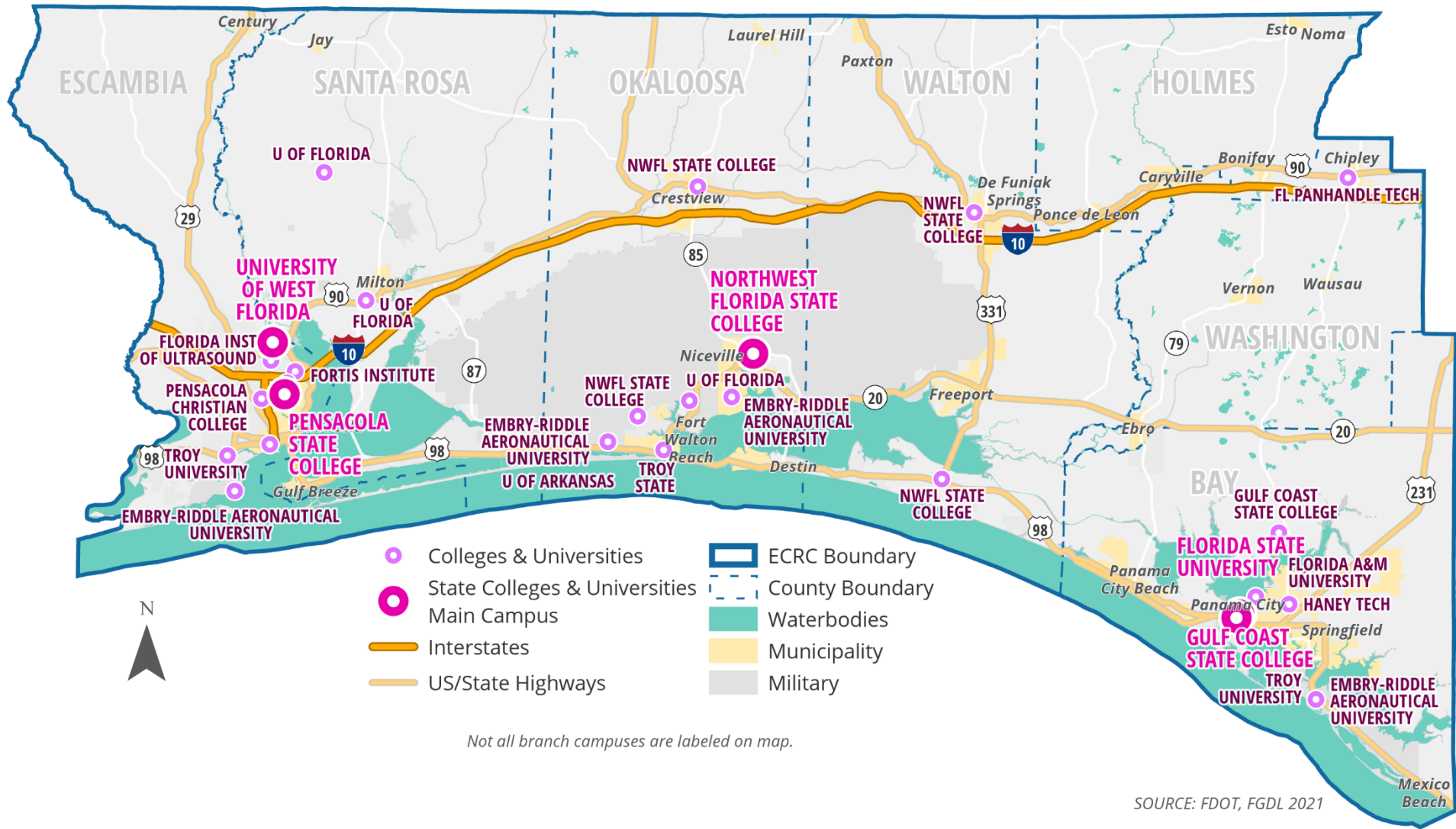
Local workforce development boards and educational institutions and their boards are inherently programmed to take the lead on talent supply issues. The Emerald Coast Regional Council will support these initiatives through regional transportation and the impact on supply like commute patterns and employee transportation reliability.

The Emerald Coast Regional Council will also continue to have a seat at the table in supporting the region's military installations, workforce boards, Economic Development Alliance (EDA) and Chambers of Commerce.

Key Strategies

1. Assist partners throughout the region in maintaining and creating the specialized educational programs and training to meet the region's ever changing business needs.

Figure 13. Emerald Coast Colleges and Universities



Innovation & Entrepreneurship

Goal: Encourage innovation and foster robust entrepreneurial ecosystems to drive economic growth.

A healthy entrepreneurial ecosystem has a balance of talented human capital, support systems, funding and customers, and policies and cultural norms that encourage innovation and business startups. When entrepreneurs have access to these components, they have a better chance of growing innovative small businesses into successful firms, thereby increasing the productivity, income, employment, and well-being of a region.



According to Stats America's "Innovation Intelligence" metrics, the Emerald Coast Economic Development District (EDD) has moderate relative Innovation Capacity. It ranks **#71 out of 393** U.S. Economic Development Districts. The index includes five major components, organized into innovation inputs and outputs, to measures both innovation capacity and innovative outcomes.



The Spring Entrepreneur Hub in Pensacola

Source: The Spring, 2021

Table 6. Emerald Coast Economic Development District's Innovation Indices and Ranking

Innovation Inputs <i>Factors, influences, or conditions that promote innovation and create knowledge</i>	Index	Core Indices*	Rank <i>(out of 393 EDDs)</i>
 Human Capital & Knowledge Creation Suggests the extent to which the population and labor force are able to engage in innovative activities	129.9	<ul style="list-style-type: none"> • Educational Attainment • Knowledge Creation and Technology Diffusion • STEM Education and Occupations 	67 A moderate level of human capital and knowledge creation
 Business Dynamics Gauges the competitiveness of a region by investigating the entry and exit of individual firms	144.7	<ul style="list-style-type: none"> • Establishment Formation • Establishment Dynamics 	53 A high level of business competitiveness
 Business Profile Measures local business conditions and resources available to entrepreneurs and businesses	104.8	<ul style="list-style-type: none"> • Venture Capital Dollar Measures • Venture Capital Count Measures • Foreign Direct Investment Attractiveness • Proprietorship 	125 A moderate relative availability of resources for entrepreneurs and businesses
Innovation Outputs <i>Direct outcomes and economic improvements that results from innovation inputs</i>	Index	Core Indices*	Rank <i>(out of 393 EDDs)</i>
 Employment & Productivity Describes economic growth, regional desirability, or direct outcomes of innovative activity	119.7	<ul style="list-style-type: none"> • Industry Performance • Industry Cluster Performance • Gross Domestic Product • Patents • Job Growth to Population Growth Ratio 	109 A moderate level of positive outcomes from existing economic activity
 Economic Well-Being Explores standard of living and other economic outcomes	119.4	<ul style="list-style-type: none"> • Residential Internet Connectivity • Compensation 	166 A moderate standard of living

SOURCE: StatsAmerica, Innovation Intelligence

*For a full list of measures included within each core index, please visit <https://www.statsamerica.org/innovation/ii3.aspx>.

Of the five components, the Emerald Coast ranks the highest in Business Dynamics, followed by Human Capital and Knowledge Creation. This indicates a skilled and growing workforce in the high-tech and creative industries, along with growth in number of new business establishments, particularly small high-tech firms, and associated jobs. The Region's high rank is attributed to a relatively high level of population growth for ages 25-44 (the prime working-age population most likely to engage in innovative technologies), educational attainment, and university-based knowledge spillover.

All state colleges and universities within the Region offer entrepreneurial and/or business development programs, many of which invite local, successful small business owners to serve as mentors and educators. In addition, the University of West Florida offers the Veterans Florida Entrepreneur Program – a free of charge course for veterans or active-duty members nearing discharge that helps them transition back to civilian life and develop business plans.

Academic research and development (R&D) positively influence new business formation and innovation through “knowledge spillover” as it can spread, uncompetitively, throughout the region. Traditional and advanced manufacturing firms can also be sources for exciting process innovations and product patents, and likewise can benefit from being connected to R&D and entrepreneurial resources available in the region. Access to R&D opportunities can spark collaboration in new business formation, which builds the region's productivity.

The presence of entrepreneur hubs, business incubators and accelerators, and cowork spaces has also grown within the Region, particularly in Pensacola and Panama City. Active founder communities (such as the Studer Community Institute in Pensacola) and events like EntreCon (Pensacola) and the ITEN WIRED Summit (Panama City) are further evidence of the region's support for entrepreneurship and innovative business creation.

Gulf Coast State College's Business Innovation Center

Gulf Coast State College's Business Innovation Center (BIC), located in Panama City, fosters entrepreneurship and innovation and helps take businesses from inception to realization. “The BIC provides a supportive environment for start-up businesses increasing the probability of success, as well as seeks to provide the ideal blend of business opportunities, resources, and synergies to enhance entrepreneurial development for expanding businesses or organizations that may be interested in relocating to Northwest Florida.” The Center's programs include discovery sessions, business assistance, guidance and mentoring, networking to capital, and technical resources.

SOURCE: www.gulfcoast.edu



Of the Innovation Index components, the Emerald Coast ranks lowest in Business Profile, indicating that local business conditions and resources may be lacking for new businesses and entrepreneurs. The low rank is attributed to a low amount of venture capital dollars flowing into the Region, as well as lack of rural internet access and relatively low proprietor incomes. So while the Region is supporting entrepreneurship and business creation, it is not necessarily supporting their retention.

Support services and infrastructure necessary for new business development, growth, and retention are primarily concentrated near the populated areas of Pensacola, Destin/Fort Walton Beach, and Panama City. There is a need to expand these services and infrastructure to rural areas, and cultivate untraditional industries such as eco-friendly product manufacturing, local food products and distribution, and historic and/or eco-tourism.

The CEDS seeks to improve competitiveness by focusing on strengthening support for new and expanding businesses, improving prospects for business longevity by assisting with emergency needs and technologies, and ensuring access to venture capital. The ECRC will use its resource partners to leverage grant and loan funding to introduce more capital into the regional entrepreneurial landscape.

Key Strategies:

1. Develop the region's entrepreneurial hubs and connect them with industry clusters, assets, services, networks, facilities, tools, and expertise in order to facilitate business creation and retention.

Infrastructure & Growth Leadership

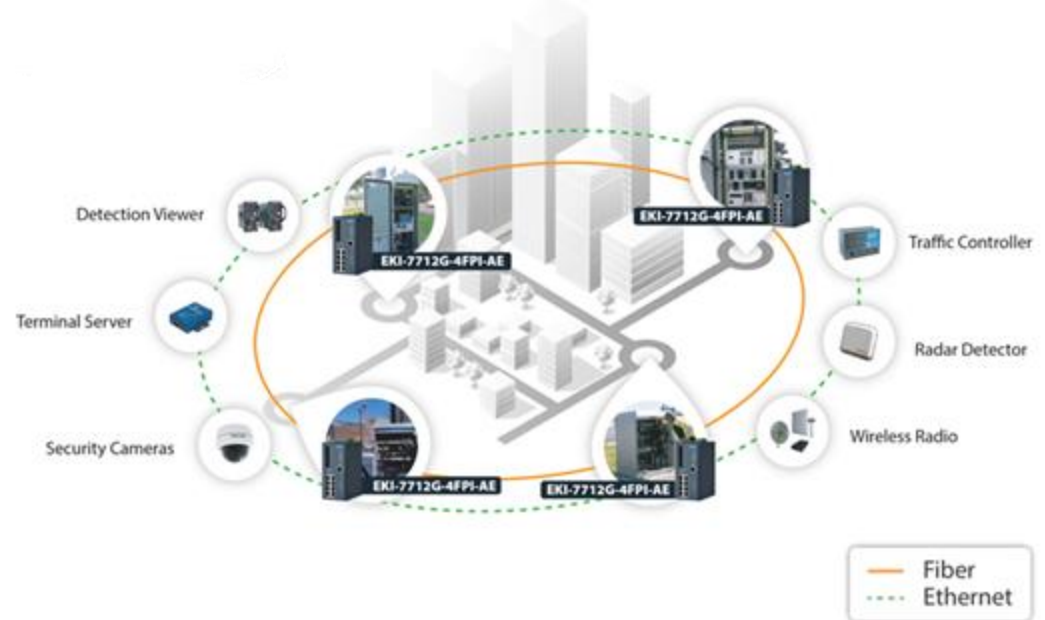
Goal: Ensure the Emerald Coast's Economic Infrastructure is state of the art and connects communities in every part of the region.

Public infrastructure includes facilities, structures, equipment, and services that are essential to the region's economy and quality of life. Encompassing transport, energy, water, and information technology, infrastructure truly is the lifeblood and connected system that keeps the region thriving. Therefore, the region must attract state, local, and private investments in infrastructure to sufficiently meet the expanding needs of a healthy economy. The region needs modernized infrastructure that facilitates the efficient movement of goods, energy, information, and people. This infrastructure facilitates a well-educated population and workforce; supports a robust economy with reliable, multi-modal transportation systems; and provides sound water and waste management systems.

Embracing Transportation Technology

The efficient flow of people, goods, and services into, out of, and within the region is critical to sustain the population growth occurring in an expanding economy. Our human capital – over one million people – must be able to get to and from daily commitments of school or work efficiently with equitable and dependable access to educational and career opportunities. Roadway construction is extremely expensive and additions to the transportation network should be utilized primarily to connect current activity nodes to further integrate the region and help manage sprawl. Working smarter and utilizing modern technology can greatly improve the user experience on the existing network. Intelligent Transportation Systems (ITS) and Advanced Traffic Management Systems (ATMS) improve transportation safety and mobility, and enhance productivity using advanced communications, sensors, and information processing technologies. The technology integration will improve the experience of not only the traveling public, but economically essential freight users.

Figure 14. Advanced Traffic Signal Management



Water Wealth

The region possesses a close connection to its water resources, whether it be the mighty Gulf of Mexico, the many rivers that traverse the area, or the Floridian aquifer that provides drinking water for the population. Long-term viability of commercial water transport and the health of the region's ports is critical to the larger freight network. Maintaining and improving our water transportation network is key to expanding the growth of manufacturing in the region. Water and sewer infrastructure is also a critical need in areas that still utilize well and septic systems. Upgrading infrastructure is important to support existing development and capture new commercial and industrial opportunities.

Bridging the Digital Divide

There are many areas in the region that still do not have reliable access to wireless internet, as indicated on the following map. Broadband internet access is key to attracting and retaining job-creating businesses, while also broadening telework opportunities. Federal and state programs have recently recognized the importance of providing quality internet access, especially in rural areas, therefore it is important to take advantage of these opportunities and determine what type of broadband investment works best for local communities.

Key Strategies:

- 1. Plan, advocate for, and create a modern infrastructure network to support a competitive economy.**
- 2. Promote a regional approach to the multi-modal transportation system for people, goods, and services.**

FHWA Resiliency Pilot Project: Barrier Island Roadway Overwashing from Sea Level Rise and Storm Surge: US 98 on Okaloosa Island

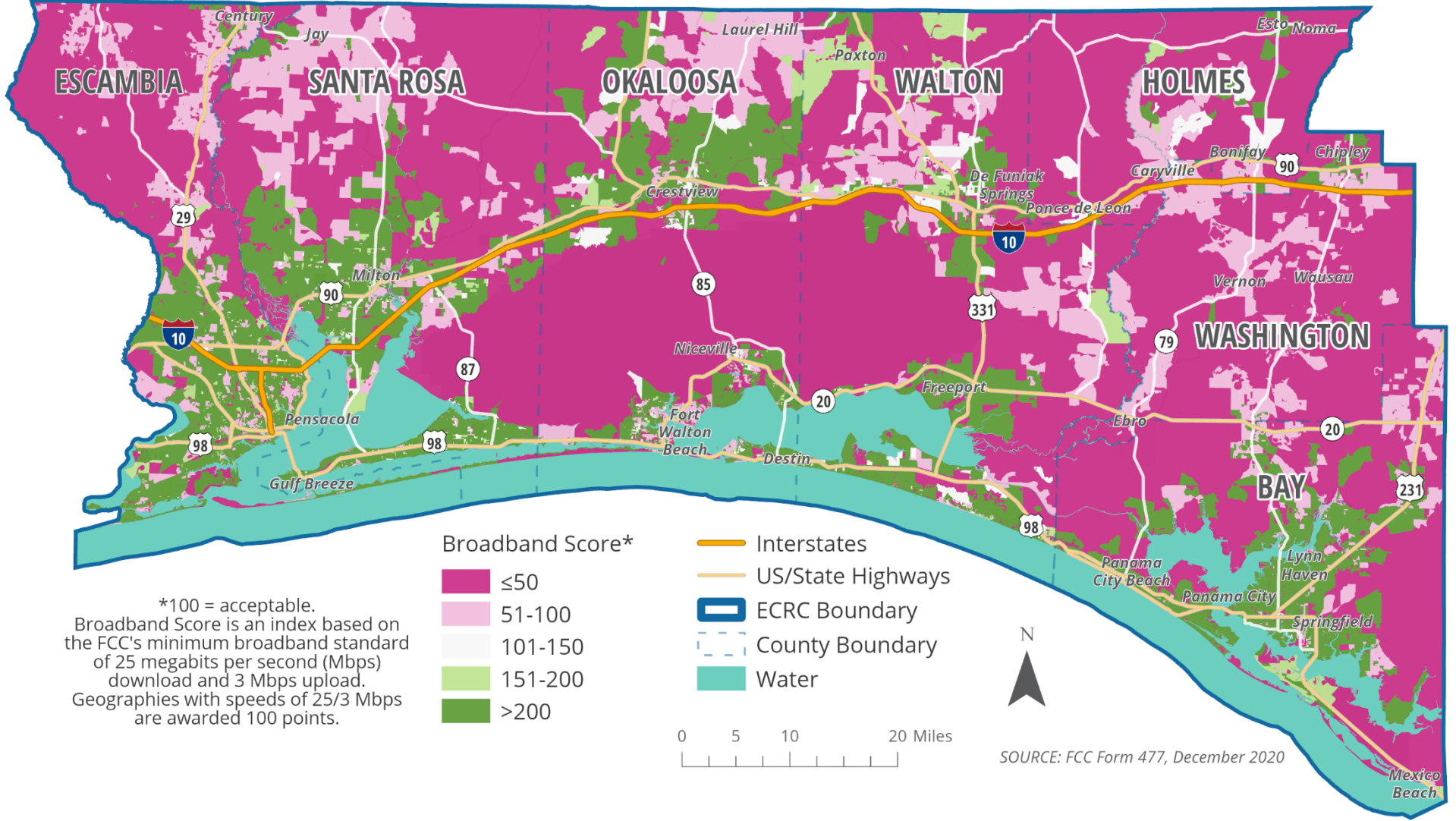
The Federal Highway Administration (FHWA) has partnered with State Departments of Transportation (DOTs), Metropolitan Planning Organizations (MPOs), and others to develop and deploy resilience solutions to current and future extreme weather events, reducing future maintenance costs over the full life-cycle of transportation assets. In this assessment, the research team investigated an engineering adaptation to increase the resilience of a coastal highway to storm events in rising sea levels. Specifically, this assessment evaluated a Florida Department of Transportation (FDOT) critical coastal roadway with a buried sheet pile wall and gabions along the shoulder. The sheet pile wall and gabions were installed as a countermeasure to reduce roadway erosion from overwash during storm events.

SOURCE: www.fhwa.dot.gov/environment/sustainability/resilience



Photo Source: FDOT

Figure 15. Federal Communications Commission Broadband Score by Census Block



Business Climate & Competitiveness

Goal: Bolster the Emerald Coast economy by recruiting new businesses and promoting the expansion of existing businesses.



The City of Pensacola receives an EDA Grant for Hangar Expansion

Source: ECRC, 2019

The Emerald Coast Region has a notable military presence, as well as a natural environment conducive to tourism – both of which attract numerous visitors from throughout the country. The region has created an identity through defense and tourism sectors, although there are several other major industry sectors found regionally as depicted in Figures 16 and 17. Government (including military), Retail Trade, Accommodation (tourism) & Food Services, and Healthcare & Social Assistance rank among the top industries in number of jobs. Other industries such as Professional, Scientific, & Technical Services; Transportation & Warehousing; Manufacturing; and Construction have shown the largest growth in number of jobs between 2018 and 2021.

To attract new companies for economic development, having a strong, well-articulated message on what the region is valued for is crucial. Florida's Great Northwest and the local Economic Development Organizations play key roles in

selling potential investors on the region's assets. One approach used is through highlighting productivity and profit opportunities created by existing regional clusters. Another approach is to focus on available land assets, ready infrastructure, and competitive incentives. Recruiting companies to consider the area takes strategic planning and site preparation, as well as ensuring appropriate incentives and land development policies are in place.

Another strategy is focusing on the necessity for economic diversification. Diversification helps manage instability and provides a more secure path for equitable growth and development. Considering questions such as 'What emerging sectors might be strengthened?' or 'Which smaller sectors are more future-oriented?' may promote such diversification.

These strategies are vital to the region's economy as employment and spending are heavily concentrated in both defense and tourism. Both are exceptionally vulnerable to influences beyond local control – this considers withdrawal and restructuring directives from the White House in the case of the military, as well as environmental disasters and/or safety concerns that may impact tourist seasons. For example, cybersecurity is a newly identified target industry, grounded in ties to military research and with potential to develop into a more idiosyncratic, high-demand sector in the coming years.

In addition to attracting new companies to the region, continuing support for existing businesses is essential. The Emerald Coast is home to many second- and third-generation businesses which have both survived and thrived over time. Business retention programs, data analytics, and industry councils supporting economic gardening can ensure there is a path for growth.

Key Strategies:

- 1. Encourage the development and growth of small businesses in rural and underserved communities.**
- 2. Coordinate planning efforts with assistance for key regional industry clusters and supply chains.**
- 3. Encourage the development of vibrant downtowns and revitalization of rural towns.**

Role of Florida's Great Northwest

Florida's Great Northwest is the regional economic development organization for the Florida Panhandle. FGNW serves as a one-stop shop for new business and expansion in the Emerald Coast region. They offer many services such as the following:

- Research on subjects including demographics, real estate, workforce and training, utilities, taxes, infrastructure
- Information on both state and local incentives as well as the incentive application process
- Liaison between businesses and state/local economic development offices
- Access to an expansive network of state, regional, and local resources.

Their main pillars include promoting the Northwest Florida region for diversification and growing the economy, advocating for economic development issues that affect the region, and collaboration with community stakeholders to unify the region.

SOURCE: <https://www.floridasgreatnorthwest.com/>

Figure 16. Top Emerald Coast Industries by Number of Jobs

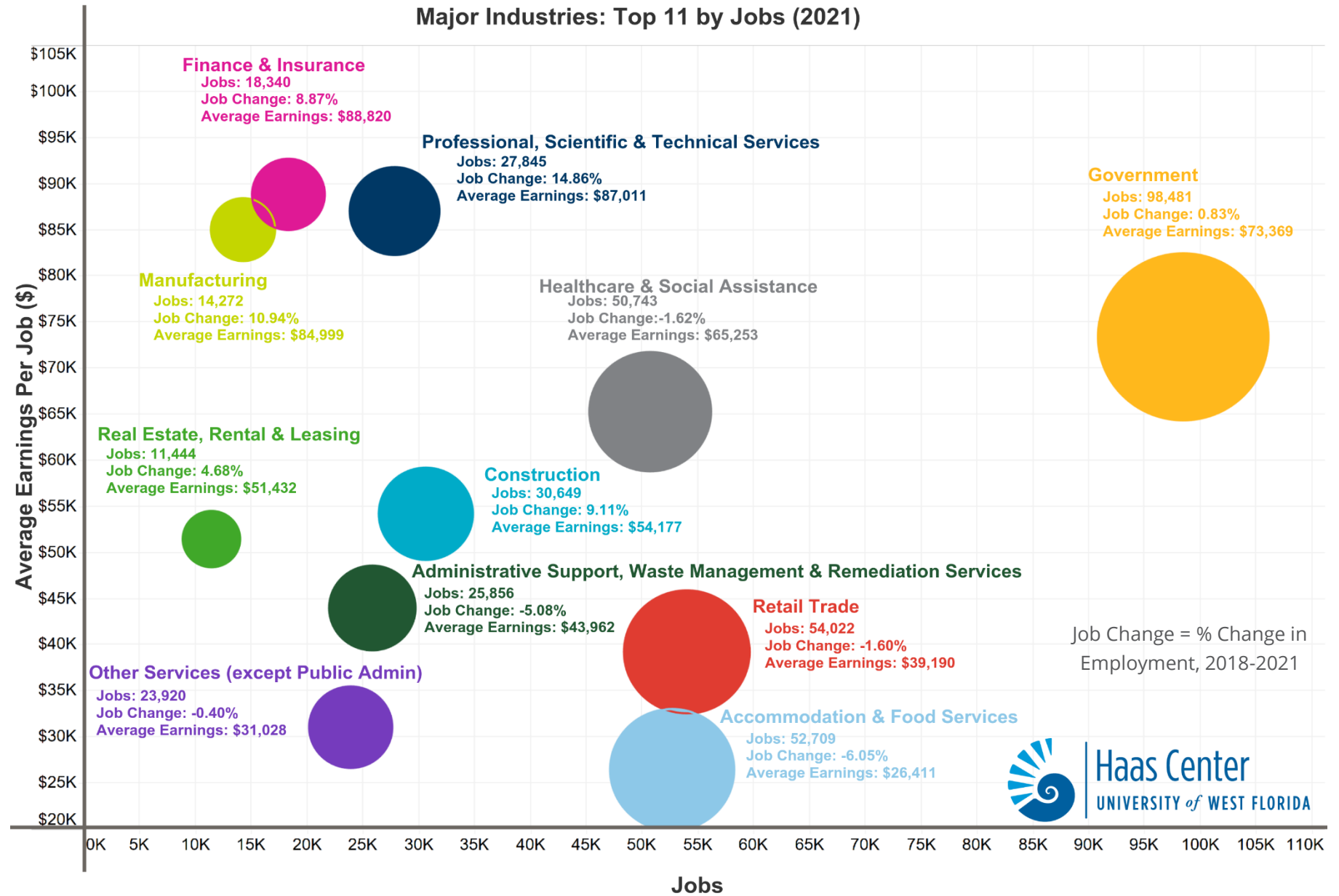
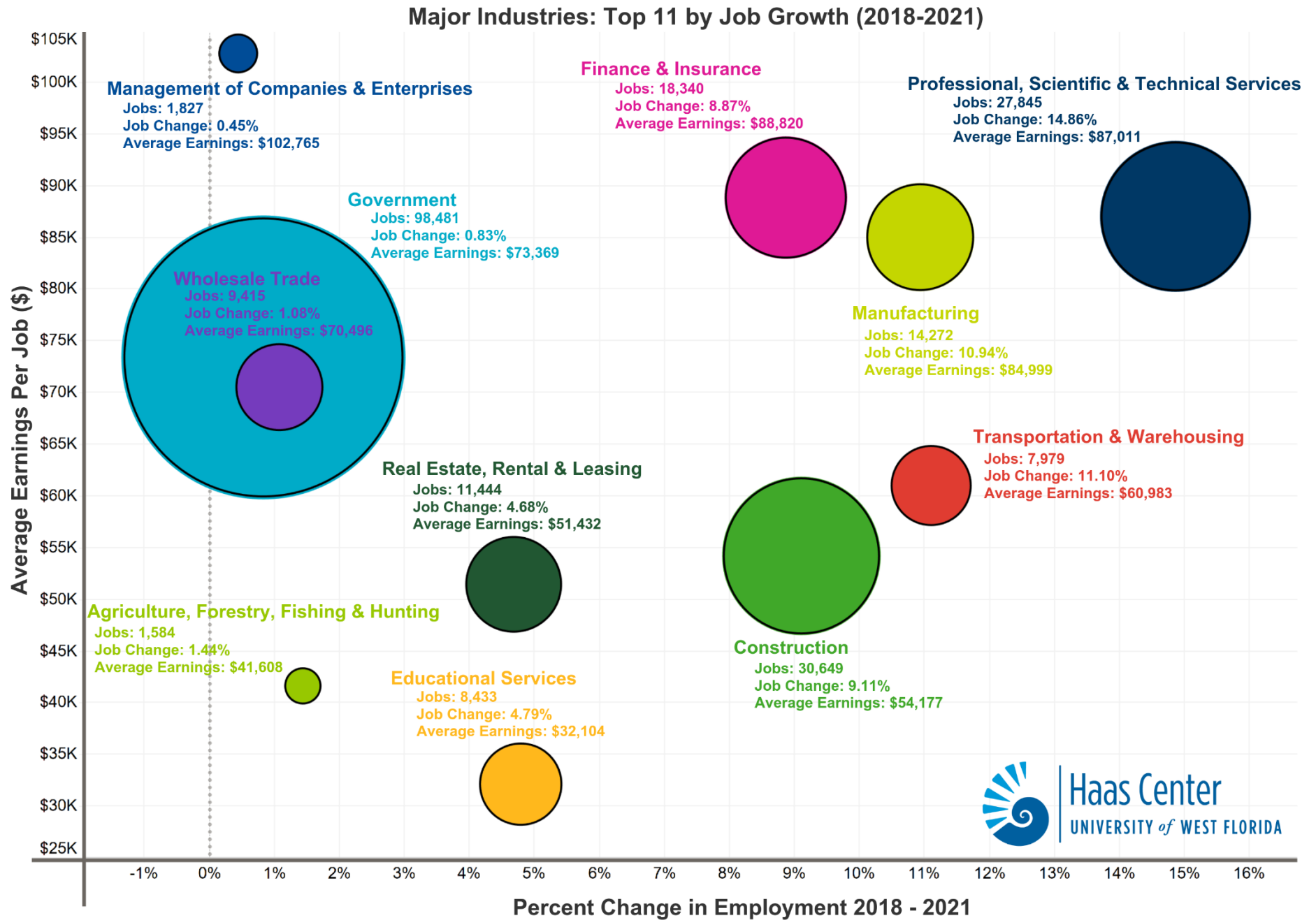


Figure 17. Top Emerald Coast Industries by Job Growth



Civic & Governance Systems

Goal: Support high quality governance to sustain Florida’s economic and quality of life expectations.

Supporting civic and governance systems in the region means working to improve the efficiency and effectiveness of government agencies at all levels. Governments need to evolve based on the demands from businesses and citizens. An indication of a responsive government is when projects and processes can be connected back to the outcome of a public engagement process or technical analysis of specific issues. Therefore, it is important for governments and agencies to engage early and often in order to capture the diverse voices of the communities they represent. It’s also important to invest in studies that identify long-term solutions for improved business and citizen experiences, reduce redundancies, and capture the social and environmental intangible benefits of a project. There are many facets of the government system, from land use and building services to economic incentives and workforce housing that must be considered to ensure a quality of place and sustainable economy. The evaluation of government systems can be done through assessments, feasibility plans, and strategic visioning. It is also important that elected officials are educated on what best practices, tools, and resources are available to govern effectively. Connecting communities to resource partners, data, and funding assistance can ultimately help them do their job better.



City Council meeting

SOURCE: ECRC

Key Strategies:

1. **Balance resources through sound management of physical development.**
2. **Strengthen partnerships with local governments, agencies, and non-profits by identifying opportunities for joint projects.**
3. **Create a culture of informed civic engagement and participation.**

Environmental Quality, Protection, & Resilience

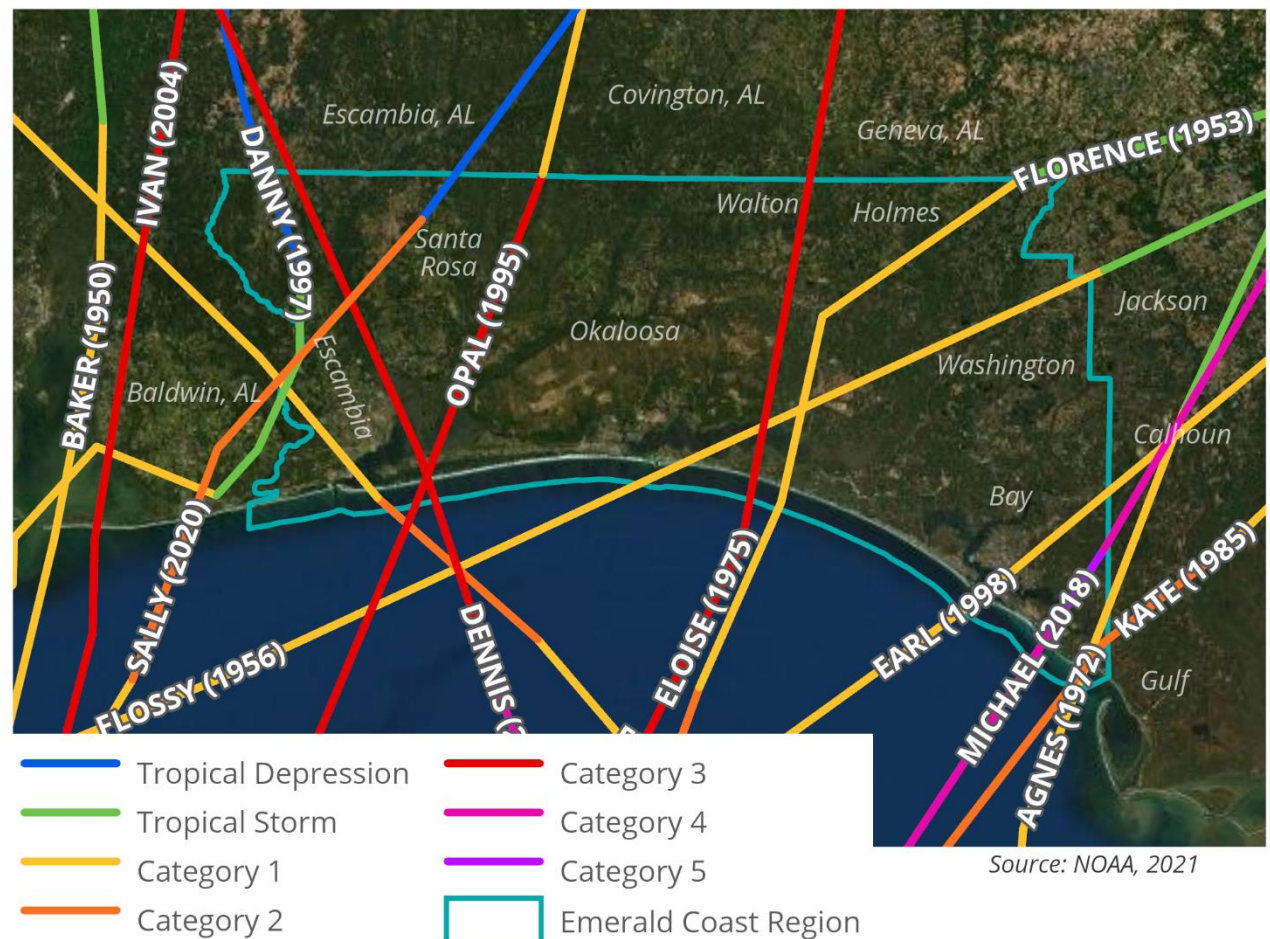
Goal: Promote regional understanding of resilience and sustainability efforts and integrate the experience of advocates and practitioners into future planning endeavors.

Ensuring that the region is resilient and ready to tackle disasters is key to ensuring a high quality of life. Without a thorough understanding of the environmental risks faced, the region's population, economy, environment, and thus, quality of life, are jeopardized. Environmental Quality, Protection, and Resilience focuses on ways the region can prepare for and recover from disasters, address environmental quality concerns, and become more resilient overall.

Disaster Preparedness & Recovery

Due to its geographic location, Florida is exceptionally vulnerable to the disruption and destruction of natural disasters such as hurricanes. The ECRC works along with Florida's other Regional Planning Councils and the Florida Division of Emergency Management to update the Statewide Regional Evacuation Study as needed and as funds are available. The most recent Study update was completed in June 2021 and included a revised shelter inventory, behavioral analysis, population and demographic analysis, storm surge analysis, and evacuation scenario modeling through the Transportation Interface for Modeling Evacuations (TIME). The Regional Evacuation Study data is provided to each county for use in their own hurricane evacuation plans and operational procedures.

Figure 18. Emerald Coast Landfalling Hurricanes 1950-2020



The ECRC serves as staff to the Emerald Coast Local Emergency Planning Committee (LEPC), which encompasses Escambia, Santa Rosa, Okaloosa, Walton, Holmes, Washington, and Bay counties. The primary goals of the LEPC are to educate the community on hazardous materials that may exist in their neighborhoods and how to respond to incidents that may occur, and to assist first responders in preparing for any hazmat-related emergencies. In compliance with the Emergency Planning and Community Right to Know Act (EPCRA), the LEPC:

- Prepares the regional hazardous materials emergency plan, which identifies facilities that use, produce, and/or store hazardous substances in Northwest Florida;
- Provides training workshops and technical assistance for local facilities and first responders, educating both on how to comply with reporting regulations under EPCRA;
- Facilitates training courses for first responders and the Regional Hazmat Teams; and
- Educates the community on EPCRA, Shelter-In-Place, and evacuations.

The ECRC also administers FDEM's Hurricane Loss Mitigation Program (HLMP) for Holmes, Washington, and Walton Counties. This program's goal is to harden single-family residences against extreme wind events by providing retrofits and upgrades to homes meeting current Florida Building Code requirements for hurricane-force wind resistance. The ECRC strategically partners HLMP with other grants and programs to stretch funding as far as possible.

Table 7. Hazard Assessment Matrix

County	Flooding	Hurricane	Tornado	Severe Storm	Wildfire	Drought	Extreme Heat	Erosion	Sinkholes
Bay	H	H	H	NI	M	NI	NI	NI	L
Escambia	H	H	L	H	M	M	NI	M	L
Holmes	H	H	H	MH	H	MH	MH	L	L
Okaloosa	H	H	M	H	M	M	L	L	L
Santa Rosa	MH	M	H	H	L	M	MH	H	L
Walton	H	H	H	H	L	L	L	H	L
Washington	H	H	M	MH	M	M	MH	MH	M

Degree of Risk

NI - Not Identified

L - Low (one occurrence every 10 years)

M - Medium (one occurrence every 5-7 years)

MH - Medium/High (one occurrence

H - High (one or more occurrences each

SOURCE: State Enhanced Hazard Mitigation Plan, 2018

Emerald Coast Area Resilience Collaborative

In March 2021, ECRC was awarded a \$15,000 grant by the American Flood Coalition to head up a regional resilience collaborative. The Emerald Coast Area Resilience Collaborative (EC-ARC) was officially created through a resolution by the ECRC Board in April 2021.

The EC-ARC is a diverse partnership of regional stakeholders who seek to identify and generate creative solutions to flooding and climate change by assessing risks and vulnerabilities from a regional perspective. The Collaborative recognizes that these crucial issues must be addressed to promote the region's health and wellness, environment, and economy. The stakeholders involved in the Collaborative represent a broad range of interests including building and infrastructure, economy and workforce, climate and natural hazards, community capacity, and agriculture and food. Through the inclusion of many different stakeholder groups, the Collaborative will be able to take on a more comprehensive approach in addressing identified issues.

This Collaborative is joining the likes of four other regional resilience collaboratives in the State of Florida – South Florida Regional Planning Council Climate Compact, East Central Florida Regional Planning Council Resilience Collaborative, Tampa Bay Regional Planning Council Resilience Coalition, and Northeast Florida Regional Planning Council Public Private Regional Resiliency Committee (P2R2).

Senate Bill 1954, put into effect in May 2021, established the Resilient Florida Grant Program enabling the Florida Department of Environmental Protection (FDEP) to offer grants to regional resilience entities, such as EC-ARC, to coordinate community resilience needs. Funding can be applied to technical assistance, the formation of multijurisdictional vulnerability assessments, and the development of regional projects to be proposed for the Statewide Plan. As a young collaborative, the EC-ARC is still determining the next steps to further its mission. One option for the Collaborative to undertake is the development of a regional risk assessment funded through the Resilient Florida Grant Program. This assessment would identify critical assets and regional vulnerabilities as well as provide actionable data. It would also pinpoint potential projects and resources to address identified vulnerabilities.

To guide the growth and mission of the EC-ARC, a one-year action plan has been developed and presented to the Collaborative stakeholders. The action plan breaks action items into four major categories: Collaborative Organization, Education, Research, and Regional Projects. Organization focuses on the collaborative's structure and organization by setting an overall direction and creating officer positions. Education includes creating a webpage to share resources and promote local efforts and inviting organizations from around the region to share information about ongoing projects. The Research component concentrates on partnering with the Florida State University/Florida A&M University RIDER Center on their ongoing resilient infrastructure research and developing a local dashboard to display resilience data. Regional Projects involves workshops and sessions with Collaborative members to identify potential projects for funding.

Estuary Programs/Water Resources

The Emerald Coast Region encompasses four major watersheds: Perdido River and Bay, Pensacola Bay System, Choctawhatchee River and Bay, and St. Andrew Bay. These watersheds are an invaluable resource to the region, attracting tourists and recreationists alike. In the Pensacola, Perdido, and Escambia Bays, the estimated value of the ecological services of seagrass meadows, oyster reef habitats, and tidal wetlands dwindled from \$443 million per year in 1960 to the current value of \$226 – a drastic decrease in the span of nearly 60 years. Guarding these precious resources is a high priority for regional groups such as the bay estuary programs. These programs are vital in the effort to restore, protect, and revitalize water resources. In addition, the bay estuary programs focus on community engagement and work to get a variety of stakeholders involved to ensure inclusivity.

There are several bay estuary programs in the region – the Pensacola and Perdido Bays Estuary Program (PPBEP), the St. Andrew and St. Joseph Bays Estuary Program (SASJBEP), and the Choctawhatchee Bay Estuary Program (CBEP). ECRC is actively involved in SASJBEP and CBEP.

The Pensacola and Perdido Bays Estuary Program focuses on restoring and protecting water quality and natural resources using partnerships. Formerly known as the Bay Area Resources Council, the program transitioned into PPBEP in 2018 after being awarded a \$2 million competitive



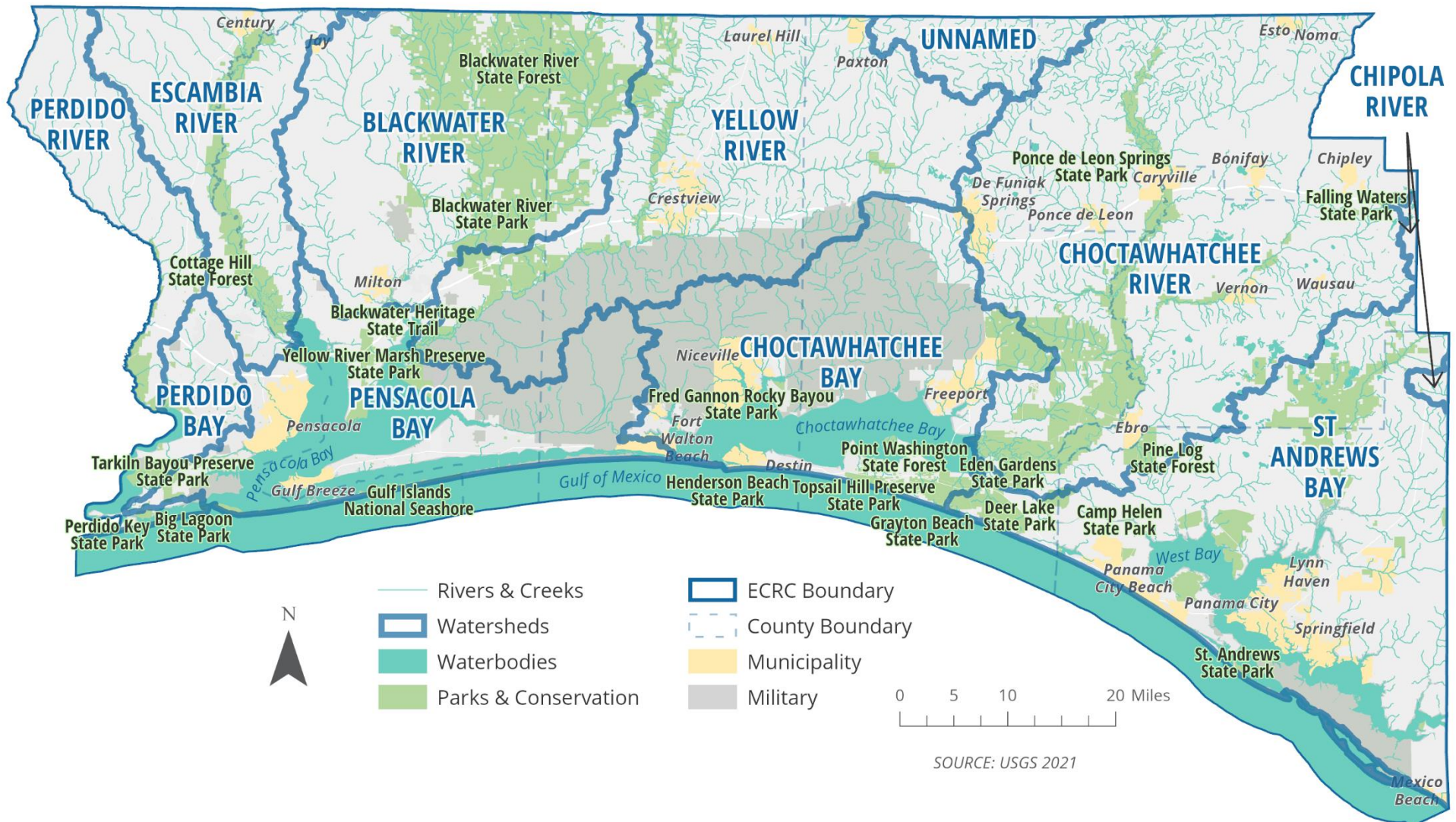
Project Greenshores Restoration Project on Pensacola Bay

SOURCE: The Nature Conservancy

grant from the Gulf Coast Ecosystem Restoration Council and the U.S. Environmental Protection Agency Gulf of Mexico Program. In 2020, the program was given \$297,220 from the EPA to identify and mediate possible sources and contributors of water-borne trash in three creeks located in the Pensacola Bay System: Jones Creek, Carpenter Creek, and Pond Creek. The program was awarded \$500,000 in Florida legislative appropriations to support the progress of their Comprehensive Conservation & Management Plan (CCMP); enrich monitoring efforts in the Pensacola and Perdido Bay systems through the creation of a comprehensive monitoring program; and implement water quality improvements and habitat restoration, as well as research, education, and outreach projects of the program, and partnering agencies through the

development of the PPBEP Mini-Grant Program. Santa Rosa County, in conjunction with the PPBEP, was given a National Coastal Resilience grant for \$73,910 to build a living shoreline habitat suitability model and master plan for the Pensacola Bay System. The project will review 175 miles of shoreline and evaluate the land use, water depth, habitat type, wave dynamics, sediment transport, and presence of hardened coastal infrastructure.

Figure 19. Watersheds, Parks, and Conservation Land



St. Andrew and St. Joseph Bays Estuary Program is a recently developed program hosted by Florida State University Panama City. This program was initially supported by Bay County RESTORE Act Funds, The Nature Conservancy, and the Florida Legislature. Like many estuary programs, this program uses a consensus-building model to draft and update a CCMP. In December 2020, the Estuary Program released a Stakeholder Assessment Report for the creation of an estuary plan for the watershed. This document reviews results from surveys conducted with stakeholders on topics such as funding, key challenges for the program, resilience, and recovery in the watershed, as well as discussing findings and recommendations. It also outlines major goals for the CCMP, which is slated to be developed by 2023. The CCMP will focus on aligning and balancing both environmental and economic priorities, implementing projects for the improvement of the bay system and watershed and monitoring outcomes, and adapting strategies through consensus building.

The Choctawhatchee Bay Estuary Program (CBEP) was established through an agreement between Okaloosa, Walton, Holmes, and Washington Counties as a regional effort to address environmental concerns related to Choctawhatchee Bay and its watershed. The Program uses scientifically-sound, community-based approaches to protect and restore natural resources and water quality for the watershed. In 2020, the CBEP released a workplan outlining the prospects of the program such as stakeholder participation, public engagement, and challenges expected. It also includes a summary of resources and stressors, as well as expectations for long-term planning, such as the creation of the CCMP (*Year One Choctawhatchee Bay Estuary Program Annual Work Plan*, 2020). Since then, the Program has conducted numerous technical advisory committee workshops to engage stakeholders in planning and brainstorming exercises related to the priorities previously identified by the group. The workshops focused on identifying data needs for topics such as water quality, natural resources, and policy and planning.

Recovery and Resiliency Partnership Projects & Regional Recreation Economy Alliance

Recreational opportunities are the lifeblood of the region. From the various trails, beaches, local and state parks, and other greenspace available in the Emerald Coast, there is no shortage of opportunities for recreation. Several organizations have recognized this and have collaborated on efforts to address the recovery and resiliency of those assets.

Made poignant by the aftermath of Hurricane Michael, the Recovery and Resiliency Partnership Projects (R2P2) was an effort made possible through technical assistance from FEMA and Integrated Recovery Coordination (IRC) that brought regional, state, and federal agencies (including ECRC) together to support coastal and inland communities. This effort also sought to improve resiliency to future stormwater impacts as well as strengthen local economies with existing natural assets. Several master documents came out of this partnership, outlining recreation projects and strategies specifically tailored to the needs of the Parker, Springfield, and Mexico Beach communities, as well as several

others outside of the Emerald Coast region. Each project identified was developed using four key pillars: community resilience, health and wellness, alternative transportation, and vibrant public spaces. Project strategies utilized include tools such as wetland retention, native planting, waterway restoration, water reuse, pollinator gardens, planted swales, pervious pavement, and rainwater storage.

In October 2020, a summit was held to engage stakeholders in a brainstorming session on additional projects and priorities to include in the final report. In February 2021, the final R2P2 report was created. This report includes information from the summit, an action plan with several themes relating to resilience and recovery, implementation opportunities, the regional recreation network, city assets and connections, and building recreation economies (r2p2.skeo.com).

To further the R2P2 efforts, the Regional Recreation Economy Alliance (RREA) was created upon the release of the R2P2 final report. RREA focuses on the progression of the vision created by the report for the region through monthly stakeholder meetings to discuss progress, funding opportunities, and next steps for various identified projects. To address specific areas of this endeavor, RREA has two subgroups based on geography: a coastal group and an inland group. Due to its geographic location, the ECRC participates and leads the coastal group. This group concentrates on topics related to the region such as the projects identified for Parker, Springfield, and Mexico Beach; funding related to those projects; and stormwater management.



R2P2 Visualization for the City of Parker

SOURCE: Skeo

Key Strategies:

- 1. Assist regional communities' disaster resilience efforts through targeted capacity building.**
- 2. Support restoration and utilization of regional waterways and greenways as a stimulant for economic growth and improved quality of life.**
- 3. Support and promote the growth of resilience initiatives and projects within the region.**

Housing

Goal: Support the creation and maintenance of a diversity of housing options to support a competitive workforce and high quality of life.

Adequate, affordable, and accessible housing is critical to a region's economic success. The Emerald Coast offers a wide diversity of housing options from luxurious beachfront living to more modest homes in cities, suburbs, and rural areas. Safe, convenient, and desirable living options are necessary to attract and retain a healthy workforce. As labor markets become more competitive, housing quality and cost are a fundamental concern for employees considering the region. Over the past few years, the COVID-19 Pandemic, major hurricanes, and supply chain disruptions have contributed to significant increases in demand coupled with challenges for new construction.

The COVID-19 pandemic and its many consequences have impacted housing markets nationwide. While the region experienced an economic slowdown in 2020, housing prices grew. The rise in work from home and remote work arrangements have brought new workers to the region. This influx of new residents has contributed to increased home prices and rental rates. The median sales price of a single-family home in the region is now \$269,000 and rising rapidly. Median sales prices increased by more than 11% between Q2 and Q4 in 2021 (National Association of Realtors, Census ACS).



New Housing Construction

SOURCE: Shutterstock

The number of residential building permits issued annually has risen by 59% from 2017 to 2021. Most permits in the region are for single family houses. Current and planned large scale developments near the coast will continue to increase the supply of higher end housing. However, only 18% of permits issued were for units in multi-family developments (HUDuser). This is a slight increase from 14% in the previous 5-year period. An essential strategy to increase the supply of housing across price points will be to promote a diversity of housing options including additional multifamily developments. Lack of affordable housing is especially notable in rural areas. Despite lower housing costs, household income for many in rural areas and small towns is also significantly lower (see Figure 20). Housing stock is often old and in need of repair, requiring resources that may not be available. A wide range of community development agencies and organizations, both public and private, work together to ensure that the housing needs of all populations are met.

The region's counties and municipalities have strategies in place to direct federal subsidies for housing for low-to-moderate income households. The need continues for coordinated planning to support connectivity when considering neighborhood reinvestment priorities, public transit routes, and proximity to jobs, schools, and services. Post-disaster recovery is another important part of maintaining a healthy housing stock in the Emerald Coast region. Following Hurricane Michael in 2018, ECRC has administered two rounds of funding through Florida's Hurricane Housing Recovery Program (HHRP) in Jackson, Washington, and Holmes Counties. The program, which is ongoing, has dedicated more than \$12.5 million to assist homeowners repair and rebuild from hurricane damage.

Florida Housing Finance Corporation's State Housing Initiatives Partnership (SHIP) offers funding and program staffing for counties to develop and implement housing strategies. When outlined in a Local Housing Assistance Plan, SHIP funds can be used to rehabilitate older homes and address maintenance issues. SHIP can also be used to provide down payment and closing cost assistance to income-qualified first-time homebuyers who would not be able to purchase a home without help. There are many additional housing programs funded through federal and state grants, including the U.S. Housing & Urban Development (HUD) Community Development Block Grant. These programs are valuable tools to use when developing comprehensive neighborhood and community development plans.

Today, funding agencies allow for more creativity in proposed approaches and for strategic combinations of policy changes and funding sources. The ECRC and partnering county governments will be exploring multiple sponsored programs to apply to future community housing plans. Furthermore, ECRC will prepare a housing readiness toolkit for local governments in the region to highlight best practices in promoting the development and maintenance of housing at all price points.

Key Strategies:

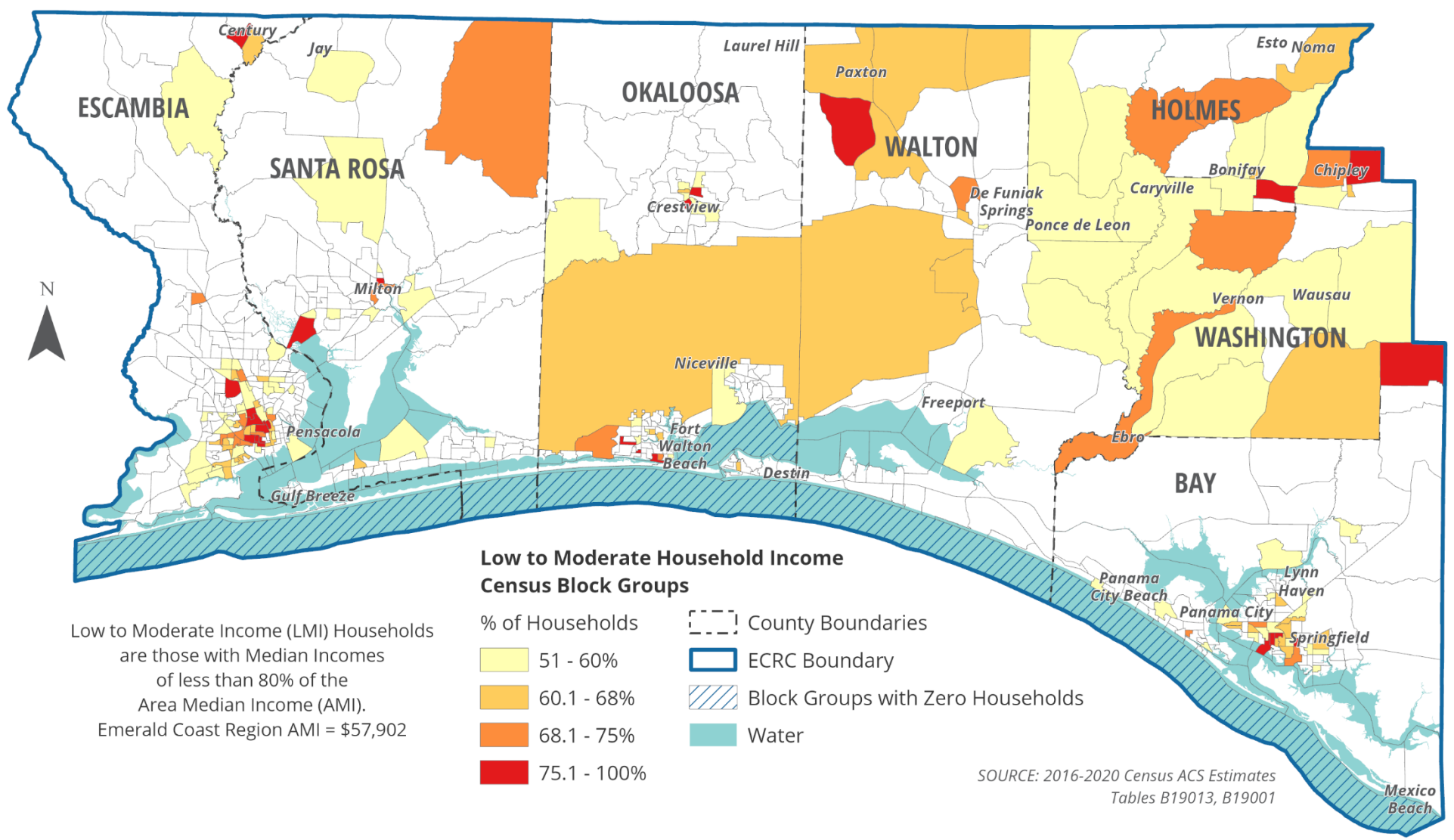
1. **Encourage and implement programs that support development of a range of housing options to meet regional demand.**
2. **Develop a toolkit for local governments to understand the range of options to improve housing access, affordability, and accessibility.**



Before and After SHIP Housing Assistance

SOURCE: ECRC

Figure 20. Low to Moderate Income (LMI) Census Block Groups



Implementation Action Plan

This section takes the strategies identified under the seven pillars and creates actions with implementation steps that will guide the ECRC's Economic Development activities as the Regional EDD over the next five years. Encompassing all areas of action is the continuous directive to seek and obtain funding opportunities. Acquiring funding is fundamental to all implementation programs, therefore, it is not listed under each individual goal.

Goal: Support educational programs, activities, and partners which encourage development of programs and opportunities that will meet the region's educational and workforce needs.

Talent Supply & Education	Action	Implementation Partners	Timeframe	Potential Resources
	Strategy 1. Assist partners throughout the region in maintaining and creating the specialized educational programs and training to meet the region's ever changing business needs.			
	1.1. Use the role of ECRC to coordinate leverage grant and low interest loan funding to support an education system responsive to business needs.	EDOs, SBDC, UWF Haas Center, Local Universities and Colleges	Continuous	EDA, Triumph, FDEO

Goal: Encourage innovation and foster robust entrepreneurial ecosystems to drive economic growth.

Innovation & Entrepreneurship	Action	Implementation Partners	Timeframe	Potential Resources
	Strategy 1. Develop the region's entrepreneurial hubs and connect them with industry clusters, assets, services, networks, facilities, tools, and expertise in order to facilitate business creation and retention.			
	1.1. Leverage federal grant and low interest loan funding to introduce more capital into the entrepreneurial landscape and assist small businesses.	EDOs, SBDC, UWF Haas Center, SBTDC	Short-Term	EDA, Triumph

Goal: Ensure the Emerald Coast’s Economic Infrastructure is state of the art and connects communities in every part of the region.

Infrastructure & Growth Leadership	Action	Implementation Partners	Timeframe	Potential Resources
	Strategy 1. Plan, advocate for, and create a modern infrastructure network to support a competitive economy.			
	1.1. Use the role of ECRC to coordinate prioritization of regional transportation projects across jurisdictional boundaries.	ECRC, TPOs	Continuous	FDOT
	1.2. Address congestion and commuter issues along major corridors such as US 98 and CR 30A through planning solutions and emerging technologies.	FDOT	Near-Term	Triumph
	1.3. Develop and implement a rural regional transportation planning process for the area outside the Transportation Planning Organization boundaries to identify and prioritize projects based on local needs and a cost feasible plan.	FDOT, TPOs, ECRC	Long-Term	FDOT
	1.4. Close the digital divide by investing in construction of fiber and wireless broadband for business retention and attraction.	ECRC, Local Governments	Long-Term	Rural Digital Opportunity Fund, Rural Infrastructure Fund, Florida Broadband Opportunity Program
	Strategy 2. Promote a regional approach to the multi-modal transportation system for people, goods, and services.			
	2.1. Coordinate and implement the design/build of a regional Advanced Traffic Management System (ATMS) and Intelligent Transportation Systems (ITS) improvements that	ECRC, Local Governments, TPOs	Long-Term	FDOT

	create a connected, computerized system that improves safety, mitigates congestion, and improves regional growth adaptability.			
	2.2. Coordinate TPO freight committees and pursue a regional freight plan to identify and resolve issues related to mobility and movement of goods and services.	ECRC, TPOs	Continuous	FDOT
	2.3. Correct current deficiencies and create a more balanced transportation portfolio with a focus on bicycle and pedestrian infrastructure related policies, roadway design standards, and funding mechanisms.	ECRC, Local Governments, TPOs	Continuous	FDOT

Goal: Bolster the Emerald Coast economy by recruiting new businesses and promoting the expansion of existing businesses.

Business Climate & Competitiveness	Action	Implementation Partners	Timeframe	Potential Resources
	Strategy 1. Encourage the development and growth of small businesses in rural and underserved communities.			
	1.1. Research capital seed funding.	ECRC, EDOs, FGNW	Continuous	EDA, USDA
	1.2. Serve as a resource partner to local Economic Development Organizations.	ECRC, EDOs	Continuous	EDA, USDA, DEO
	Strategy 2. Coordinate planning efforts with assistance for regional key industry clusters and supply chains.			
	2.1. Promote North Florida Manufacturing, Logistics, and Distribution Corridors through the platform of the TPO freight groups.	ECRC, TPOs	Continuous	FDOT
	2.2. Use representation on the Florida Freight Committee to advocate funding for regional supply chain projects and promote significance of regional infrastructure for inclusion in national highway freight network.	ECRC, Local Governments, Ports, Airports, TPOs	Continuous	FDOT
	Strategy 3. Address site development to accommodate business expansions and relocations.			
	3.1. Conduct regional assessments of specific commercial and industrial-use accommodations in new and existing business parks.	ECRC, EDOs	Short-Term	EDA
	3.2. Strengthen the role and presence of ECRC within local economic development organizations.	ECRC, EDOs, FGNW, Local Governments	Continuous	EDA
	3.3. Research shared revenue models for business site development.	ECRC, Local Governments, EDOs, FGNW	Long-Term	Local Governments

Goal: Support high quality governance to sustain Florida's economic and quality of life expectations.

Civic & Governance Systems	Action	Implementation Partners	Timeframe	Potential Resources
	Strategy 1. Balance resources through sound management of physical development.			
	1.1. Coordinate economic development efforts with related land use planning for consistency among government departments.	ECRC, Local Governments, EDOs	Continuous	DEO, EDA
	Strategy 2. Strengthen partnerships with local governments, agencies, and non-profits by identifying opportunities for joint projects.			
	2.1. Conduct workshops and roundtables on planning policies and procedure, economic development tools, and available funding programs.	ECRC, Local Governments, EDOs, FAC, TPOs, FLOC	Continuous	FAC, FLOC
	Strategy 3. Create a culture of informed civic engagement and participation.			
	3.1. Support early and continuous public involvement in development and implementation of plans and decision-making process through modern yet accessible methods.	ECRC, Local Governments, EDOs	Continuous	FDOT
	3.2. Ensure equitable representation from small business owners, special populations, and traditionally underserved populations by creating outreach methods tailored to the audience.	ECRC, Local Governments, EDOs	Continuous	EDA, DEO

Goal: Promote regional understanding of resilience and sustainability efforts and integrate the experience of advocates and practitioners into future planning endeavors.

Environmental Quality, Protection, & Resilience	Action	Implementation Partners	Timeframe	Potential Resources
	Strategy 1. Assist regional communities' disaster resilience efforts through targeted capacity building.			
	1.1. Conduct workshops on environmental resilience planning that help create the connection between land use strategies, smart design, and economic impact.	ECRC, EDOs, TPOs, FLOC, FAC, Local Governments	Continuous	EPA, DEP, DEO
	1.2. Coordinate the Local Emergency Planning Committee and facilitate exercise drills for government entities such as health departments and airports.	ECRC, LEPC	Continuous	DEM
	1.3. Provide technical assistance to local jurisdictions on coastal management strategies.	ECRC, Local Governments	Continuous	DEO
	1.4. Head up and coordinate a regional resilience collaborative to address regional resilience issues.	ECRC, Local Governments, American Flood Coalition, NFWF, TNC, NFWFMD	Continuous	FDOT
	Strategy 2. Support restoration and utilization of regional waterways and greenways as a stimulant for economic growth and improved quality of life.			
	2.1. Work with local governments and nonprofits to plan for greenway trails and connectivity.	ECRC, Local Governments, Environmental Organizations (EPA, DEP)	Continuous	DEP, DEO
	2.2. Work to improve and protect waterways through coordination of coalitions and planning efforts	ECRC, Local Governments, Environmental Organizations	Continuous	RESTORE, DEP

	2.3. Plan and implement environmental education programs and events.	ECRC, Local Governments, Environmental Organizations	Continuous	EPA, DEP
	Strategy 3. Support and promote the growth of resilience initiatives and projects within the region.			
	3.1 Create an annual Action Plan to plan for and implement resilience projects and initiatives in the region through the EC-ARC.	ECRC, Local Governments, Environmental Organizations, FAMU-FSU	Annual	RESTORE, DEP, EPA
	3.2 Host an online forum to harbor information on resilience projects and initiatives in the region.	ECRC, Local Governments, Environmental Organizations, FAMU-FSU	Near-Term	N/A

Goal: Support the creation and maintenance of a diversity of housing options to support a competitive workforce and high quality of life.

Housing	Action	Implementation Partners	Timeframe	Potential Resources
	Strategy 1. Encourage and implement programs that support development of a range of housing options to meet regional demand.			
	1.1 Perform housing research, support planning efforts, provide grant writing and technical assistance.	ECRC, Local Governments, Non-Profit Housing Organizations	Continuous	HUD
	Strategy 2. Develop a toolkit for local governments to understand the range of options to improve housing access, affordability, and accessibility.			
	2.1 Develop and share a toolkit highlighting options to improve housing for the region's local governments.	ECRC, Local Governments	Short-Term	Florida Housing Finance Corporation, Florida Housing Coalition, Housing Assistance Council

Projects to Watch

Okaloosa County

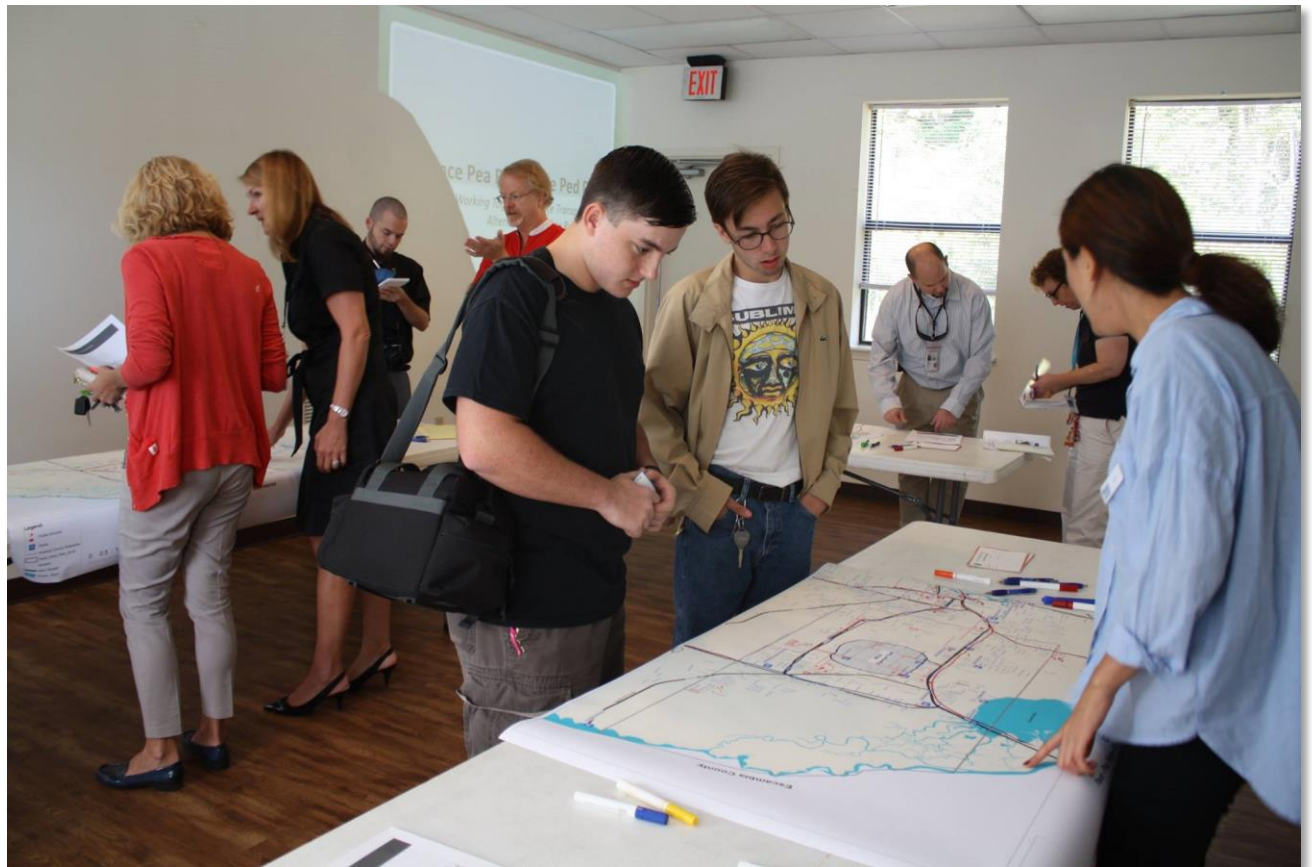
Shoal River Ranch Gigasite: This is a 10,500-acre industrial park located at I-10 and U.S. Highway 90 being positioned for large scale economic development. Water and sewer service were recently extended from Triumph Gulf Coast resulting in all utilities being adjacent to the property. The upcoming phase of the project will involve securing funding for intersection improvements and road construction.

Bob Sikes Airport: Consideration is being placed on locating a manufacturing facility on a 20-acre parcel east of the runway. This project would require utility extensions, taxiway and apron construction, road extensions, and parking construction.

Futures Park/PARRCS: A potential park project has been conceptualized for an 80-acre Enhanced Use Lease opportunity on federal land. This project is envisioned as a research and development-oriented park near Eglin's AFB's west gate and directly adjacent to University of Florida's Research Engineering & Education Facility (UF REEF).

Fort Walton Beach Commerce & Technology Park: This project is a 300-acre park including a wide range of tenants such as Boeing and Lockheed Martin that has recently undergone a comprehensive master planning process. The Master Plan proposes several transportation improvements.

Holt Industrial Park: This is a small, industrial enclave located on I-10. Businesses located there are currently on septic and sewer situated 12 miles away.



Public Workshop on Corridor Improvements in Santa Rosa County

SOURCE: ECRC

Escambia County

OLF-8: This is Escambia County's newest 500-acre mixed-use commerce park located adjacent to Navy Federal Credit Union off I-10. The Master Plan includes residential, retail, public amenities, office, commercial, and light industrial uses. Marketing and infrastructure development for this project is ongoing.

The Bluffs: The Bluffs is Northwest Florida's Energy Intensive Industrial Park and is undergoing the next steps in marketing and infrastructure development.

Co:Lab Expansion: Escambia County and Pensacola's 22,000-square foot business incubator and growth accelerator is undergoing expansion efforts.

American Rescue Plan Build Back Better Regional Challenge Application: An application is being developed to submit for the ARPA Build Back Better Regional Challenge to grow regional industry clusters around manufacturing, Department of Defense growth, and aviation-related industries. Efforts would develop new and scale existing industry clusters through planning, infrastructure, innovation and entrepreneurship, workforce development, and access to capital.

MxD West Florida: MxD (Manufacturing x Digital) West Florida is an effort by the University of West Florida to create a regional version of the MxD in Chicago. This facility would harness many of the natural assets in downtown Pensacola, proximity to the Port of Pensacola for blue technology development, and existing UWF infrastructure in the downtown area. Funds are being sought to either renovate an existing large facility or for a new build. The expansion/new build would allow growth of current laboratories near the port to accommodate more projects, as well as train a larger number of students downtown.

Port of Pensacola Upgrades: The Port of Pensacola is continually seeking improvements to increase the region's freight capacity including: Berth #6 Rehabilitation, Internal Heavy Load Roadway and Project Cargo Working Area Reinforcement, Upland Cargo Improvements, On-Port Rail Resiliency and Efficiency Enhancement, and the construction of a Manufacturing Complex with a Dry Storage Facility, Small Boat Launch, and Marine Industry Training and Manufacturing Facility.

Bay County

Commerce Park: The City of Lynn Haven is in the process of planning its third commerce park to accommodate current and future business expansion and relocation needs. The next steps of the project include identifying the ideal site and securing funding for required infrastructure.

Funding Resources

Funding will be a critical component to implement many of the goals and strategies outlined in this document. Below are several potential resources that could be utilized to support these initiatives.

U.S. Economic Development Administration (EDA)

The EDA's mission is to forward the Federal economic development agenda by promoting innovation and competitiveness and preparing American regions for economic growth and success within the worldwide economy. This mission is fulfilled through strategic investment and partnerships to create regional economic ecosystems necessary to cultivate competitive regions throughout the United States.

- **Planning and Local Technical Assistance Program:** This program assists eligible recipients in developing economic development plans and studies designed to build capacity and guide the economic prosperity and resiliency of a region. It supports organizations and other eligible recipients with short-term and state planning investments to guide the potential creation and retention of high-quality jobs, particularly for the unemployed and underemployed in the Nation's most economically distressed regions.
- **Build to Scale Program:** The B2S Program builds regional economies through scalable startups through the Venture Challenge and Capital Challenge. Through this program, the EDA manages several grant competitions furthering technology-based economic development initiatives that accelerate high quality job growth, create more economic opportunities, and support the future of the next generation of industry leading companies.

Florida Department of Economic Opportunity (DEO)

The DEO's primary goal is to assist the Governor in advancing Florida's economy through advocating for the state's economic development vision and by administering state and federal programs that seek to help visitors, citizens, businesses, and communities.

- **Community Development Block Grant:** Federally awarded by the U.S. Department of Housing and Urban Development, CDBG funds are administered through DEO and focus on developing viable communities through the provision of decent housing, suitable living environments, and expanding economic opportunities for persons of low- and moderate-income. The DEO manages several CDBG programs: Florida Small Cities Community Development Block Grant Program, Community Development Block Grant – CV (Corona Virus), and Community Development Block Grant – DR (Disaster Recovery).
- **Community Planning Technical Assistance Grants:** These grants provide counties, municipalities, and regional planning councils the ability to create innovative plans and development strategies to promote diverse economies, vibrant rural and suburban areas, and meet statutory requirements for planning, while protecting environmentally sensitive areas. These grants can also be used for disaster recovery, resilience planning, and economic development planning.

- **Florida Job Growth Grant Fund:** This is an economic development program focused on promoting public infrastructure and workforce training across the state. Proposals are reviewed by DEO and Enterprise Florida and selected by the Governor to meet the demand for workforce or infrastructure needs in the community they are awarded to.
- **Competitive Florida Partnership Grant:** Competitive Florida Partnership grants offer small and rural cities, along with regional planning councils, the ability to create an asset-based economic development strategy through innovative planning and development.

Florida Department of Environmental Protection (DEP)

- **Florida Recreation Development Assistance Program:** FRDAP is a competitive, reimbursement grant program that offers assistance for acquisition or development of land for public outdoor recreation. County governments, municipalities, and other legally constituted local governmental entities with the responsibility of providing outdoor recreation sites and facilities for the public are all eligible for this program.
- **Florida Forever:** Florida Forever is the State's conservation and recreation land acquisition program and serves as a blueprint for conserving natural resources, thereby renewing Florida's commitment to conserve natural and cultural heritage.
 - **Parks and Open Space Florida Forever Grant Program:** The Parks and Open Space Florida Forever Grant Program helps communities meet the challenges associated with growth, supports viable community development, and protects natural resources and open space. This program receives 21% of the Florida Forever appropriation.
- **Land and Water Conservation Fund:** This is a federal competitive program that provides grants for the acquisition or development of land for public outdoor recreation. Eligible participants include Florida municipalities, county governments, and any other legally constituted local government entities that maintain outdoor recreational sites and facilities for the public.
- **Recreation Trails Program:** RTP is another federally funded competitive grant program through DEP that offers financial assistance to city, county, state, or federal governments or organizations for the development of recreational trails, trailheads, and trailside facilities.
- **Resilient Florida:** The Resilient Florida program is a selection of different grants available to counties, water management districts, flood control districts, and regional resilience entities. Eligible entities may receive funding to analyze and plan for vulnerabilities and implement projects for adaptation and mitigation.

United States Department of Agriculture (USDA)

- **Community Facilities Direct Loan and Grant Program:** This program provides affordable funding in the form of low-interest direct loans or grant awards to purchase, construct, and/or improve essential community facilities, purchase equipment, and pay related

expenses. Public bodies and community-based nonprofits within rural areas (outside of Census defined urban areas) are eligible.

- **Economic Impact Initiatives Grants:** These grants provide funding assistance for the development of essential community facilities in rural communities with extreme unemployment and economic depression. Eligible entities include public bodies, non-profits, and federally recognized tribes.
- **Rural Economic Development Loan and Grant Program:** This program offers funding for rural projects through local utility organizations. USDA provides zero-interest loans or grants to create RLF programs to local utilities to pass through to local businesses for projects to create and retain employment in local areas. Eligible entities include nonprofit utilities, former Rural Utilities Service borrowers, and current Rural Development Electric or Telecommunication Programs borrowers.
- **Emergency Community Water Assistance Grants:** This program assists eligible communities in preparing for or recovering from an emergency that threatens the availability of safe, reliable drinking water. Eligible entities include most state and local governmental entities, nonprofit organizations, and federally recognized tribes.

United States Environmental Protection Agency (EPA)

- **Brownfield Assessment Grant:** Brownfield Assessment Grants provide funding for the recipient to inventory, characterize, assess, conduct planning activities, develop site-specific cleanup plans, and conduct community involvement related to brownfield sites.
- **Environmental Justice Small Grants Program:** This program supports communities working on solutions to local environmental and public health issues. It focuses on helping communities understand and address exposure to multiple environmental issues and risks. Eligible entities include most non-profits, U.S. territories, and tribal governments and organizations.

Florida Department of Transportation (FDOT)

- **Transportation Alternative Grants:** This program focuses on funding a variety of small-scale transportation projects such as pedestrian and bicycle facilities, recreational trails, safe routes to school projects, community improvements such as historic preservation and vegetation management, and environmental mitigation related to stormwater and habitat connectivity.
- **Commuter Assistance Funds:** Florida's Commuter Assistance Program offers quality travel choices to ensure mobility, sustain the quality of the environment, preserve community values, and reduce energy consumption. While funds are generally used for marketing and outreach programs, they can also be used for innovative commuter routes.
- **State Block Grant Program:** This program offers numerous grants related to different areas of transportation including metropolitan and state transit planning, capital and operating assistance in urban areas, capital projects to meet the needs of the elderly and individuals with disabilities, capital and operating assistance in rural areas, buses and bus facilities, and metropolitan planning.

- **Fixing America's Surface Transportation Act:** The FAST Act focuses on safety, keeps the established structure of various highway-related programs managed, continues efforts to streamline project delivery, and provides a dedicated source of federal dollars for freight projects.

Federal Transit Administration (FTA)

- **Grants for Buses and Bus Facilities Program:** This federal program offers funding to states and direct recipients to replace, rehabilitate, and purchase buses and related equipment as well as construct bus-related facilities including technological changes or innovations to modify low or no emission vehicles or facilities. Funding is provided through formula allocations or competitive grants.

United States Department of Housing and Urban Development (HUD)

- **Choice Neighborhoods Planning Program:** The Choice Neighborhoods program utilizes public and private dollars to support locally driven strategies that address struggling neighborhoods with severely distressed public housing and/or HUD-assisted housing through a comprehensive approach to neighborhood revitalization. The goal is to bring local leaders, residents, and various stakeholders such as public housing agencies, cities, schools, police, business owners, nonprofits, and private developers together to implement a plan that transforms distressed HUD housing and addresses challenges in the surrounding neighborhood.

Triumph Gulf Coast

In July 2015, British Petroleum (BP) reached a settlement requiring a \$18.5 billion payout in damages to Gulf Coast States affected by the 2010 Deepwater Horizon Oil Spill. The eight Florida counties disproportionately affected by the spill have \$1.5 billion to share as part of [Triumph Gulf Coast](#). Eligible projects for funding include:

- Grants to support programs that prepare students for future occupations and careers at K-20 institutions that have campuses in the disproportionately affected counties.
- Grants to support programs that provide participants in those counties with transferrable, sustainable workforce skills not confined to a single employer.
- Grants to the tourism entity created under s.88.1226 for advertising and promoting tourism and Fresh from Florida.
- Grants to local governments in affected counties to establish and maintain equipment and trained personnel for local action plans of response to disasters, such as plans developed for Coastal Impacts Assistance Program.
- Public infrastructure projects for construction, expansion, or maintenance that enhance economic recovery, diversification, and enhancement of development in affected counties.
- An ad valorem tax reduction in affected counties.

Evaluation Framework

The CEDS Evaluation Framework is a summary of key Region, State, and U.S. data points from the U.S. Census Bureau, American Community Survey (ACS), U.S. Bureau of Economic Analysis (BEA), and U.S. Bureau of Labor Statistics (BLS). These data metrics serve as performance metrics in evaluating the progress of achieving the CEDS goals and objectives.

Median Household Income

Census ACS 2016-2020

ECRC Region
\$55,487



Florida
\$57,703

United States
\$64,994

Per Capita Income

BEA 2020

ECRC Region
\$50,921



Florida
\$55,675

United States
\$59,510

Labor Force

BLS 2021

ECRC Region
466,501



Florida
10,312,768

Business Establishments

BLS 2020

ECRC Region
29,245



Florida
746,409

Total Employment

BLS 2020

ECRC Region
366,443



Florida
8,447,957

Total Population

2020 Census

ECRC Region

1,017,065



Florida
21,538,187

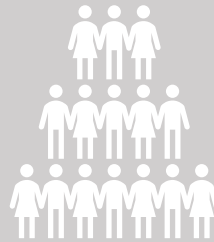
United States
331,449,281

Population Density

(Per Square Mile)
2020 Census

ECRC Region

186.5



Florida
401.6

United States
93.8

Population Age 25-44

Census ACS 2016-2020

ECRC Region

26.4%



Florida
25.1%

United States
26.6%

Population Age 65+

Census ACS 2016-2020

ECRC Region

16.9%



Florida
20.5%

United States
16.0%

Poverty Rate

Census ACS 2016-2020

ECRC Region

12.6%



Florida
13.3%

United States
12.8%

Bachelor's Degree or Higher

(Age 25+)

Census ACS 2016-2020

ECRC Region

27.2%



Florida
30.5%

United States
32.9%