

COMPARISONS OF THE I-4 TECHNOLOGY CORRIDOR AND NORTHEAST FLORIDA REGION

Mr. Henry Luke, President of Luke Planning, Inc., presented this report at the September 16, 2009 Caring Community Conference with modifications on December 17, 2009

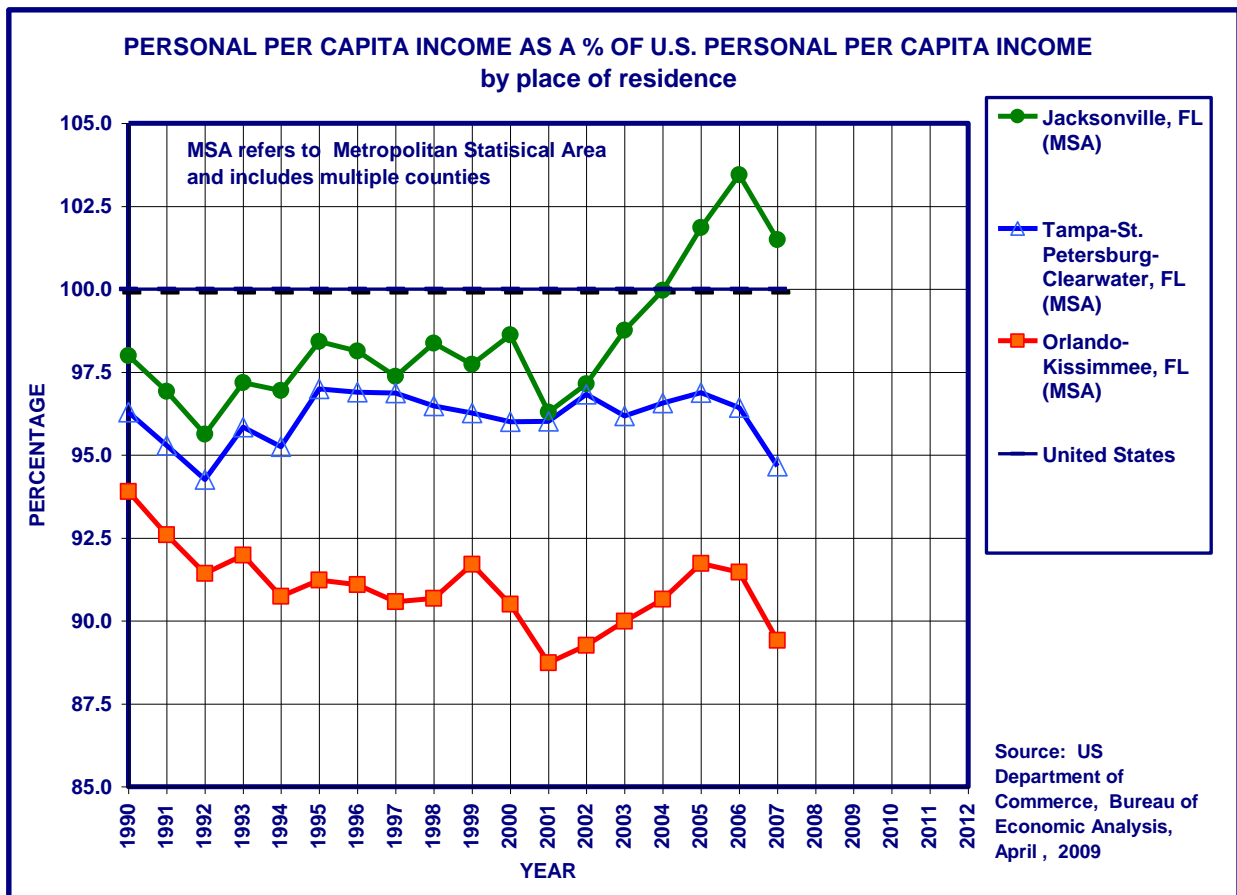
Click [here](#) for the 2009 Caring Community Conference Summary Brochure.

Personal Per Capita Income

The chart below shows the Personal Per Capita Income as a % of the US Personal Per Capita Income (PCI) for the Jacksonville, Orlando and Tampa Metropolitan Statistical Areas (MSAs). Personal per capita income for the three MSAs and as a percentage of the US:

<i>MSA</i>	<i>PCI</i>	<i>% of US</i>
Jacksonville	\$39,191	101.5%
US	\$38,615	100.0%
Tampa	\$36,554	94.7%
Orlando	\$34,528	89.4%

If Jacksonville's MSA per capita income was at Orlando's level, **there would be \$6.4 billion less personal income in the Jacksonville MSA economy.** Jacksonville's higher per capita income reflects the economic impact of healthcare and bioscience in the community. In the 2008 BEA data the Jacksonville MSA personal per capita income was higher than the Charlotte and Atlanta MSAs.



Investments and incentives of over \$1.5 billion are being made in Orlando in a new medical city at Lake Nona. (See page 5 & 6 for description) This is an attempt to boost their medical and research to increase income.

Jacksonville's Healthcare and Bioscience Job Sector

Jacksonville has been making these investments for over 40 years and is in a very strong, but largely unrecognized position today. **One in every six employees in the Jacksonville MSA work in the "Healthcare and Bioscience" job sector**, according to the Center for Global Health and Medical Diplomacy (CGH & MD) ...2008 report....Economic Impact of Healthcare. This is almost 94,000 employees with an average wage above the Jacksonville average wage. The total economic impact of this sector in 2006 was \$23.6 billion. Click [here](#) for the report.

Largest Healthcare and Bioscience Organizations

Organization	Website Address	Employees
Baptist Health System	www.e-baptisthealth.com	8,129
BlueCross BlueShield	www.bcbsfl.com	7,315
Shands	www.shandsjacksonville.org	5,700
UF College of Medicine - Jax	www.hscj.ufl.edu	
Mayo Clinic	www.mayoclinic.org	5,000
St. Vincent's HealthCare	www.jaxhealth.com	3,700
Naval Hospital Jacksonville	www.med.navy.mil/sites/nhjax	2,500
Vistakon	www.acuvue.com	2,000
Memorial Hospital	www.memorialhospital.com	1,800
Flagler Hospital	www.flaglerhospital.org	1,500
Northeast Florida Mental Health	www.friendsofnefsh.org	1,192
PSS World Medical	www.pssd.com	1,200
Orange Park Medical Center	www.opmedical.com	950
Duval County Health Department	www.dchd.net	900
Brooks Health System	www.brookshealth.org	850
Nemours Children's Clinic and Headquarters	www.nemours.org	800
Community Hospice of Northeast Florida	www.communityhospice.com	700
Medtronic	www.xomed.com	650

		Assets
Alfred I. DuPont Testamentary Trust	www.alfrediduponttrust.org	\$ 4 billion

Research

Total research expenditures is increasing in the Jacksonville MSA and Northeast Florida region. A survey by the CGH & MD indicated the following partial list of Jacksonville 2008 research expenditures:

Mayo Florida	\$50 million
UNF	\$15 million
UF Shands Jacksonville	\$8 million
Nemours Jacksonville	\$4 million
Total	\$77 million

The Center for Measuring University performance <http://mup.asu.edu/> provides the following comparisons:

Northeast Florida	Total 2006 Research Millions
University of Florida	\$557.3
Jacksonville from center survey	\$77.00
Total	\$634.5
I-4 Technology Corridor	
USF	\$285.9
UCF	\$108.0
Total	\$393.9

The University of Florida ranks 16th among the top American Research Universities in the US in 2006 in total research dollars. The UF total in the table above has been reduced by the \$8 million in Jacksonville.

Jacksonville has a head start....will we maintain our position? Implementing the recommendations below from the September 2007 Caring Community Conference will make real progress in addressing this issue.

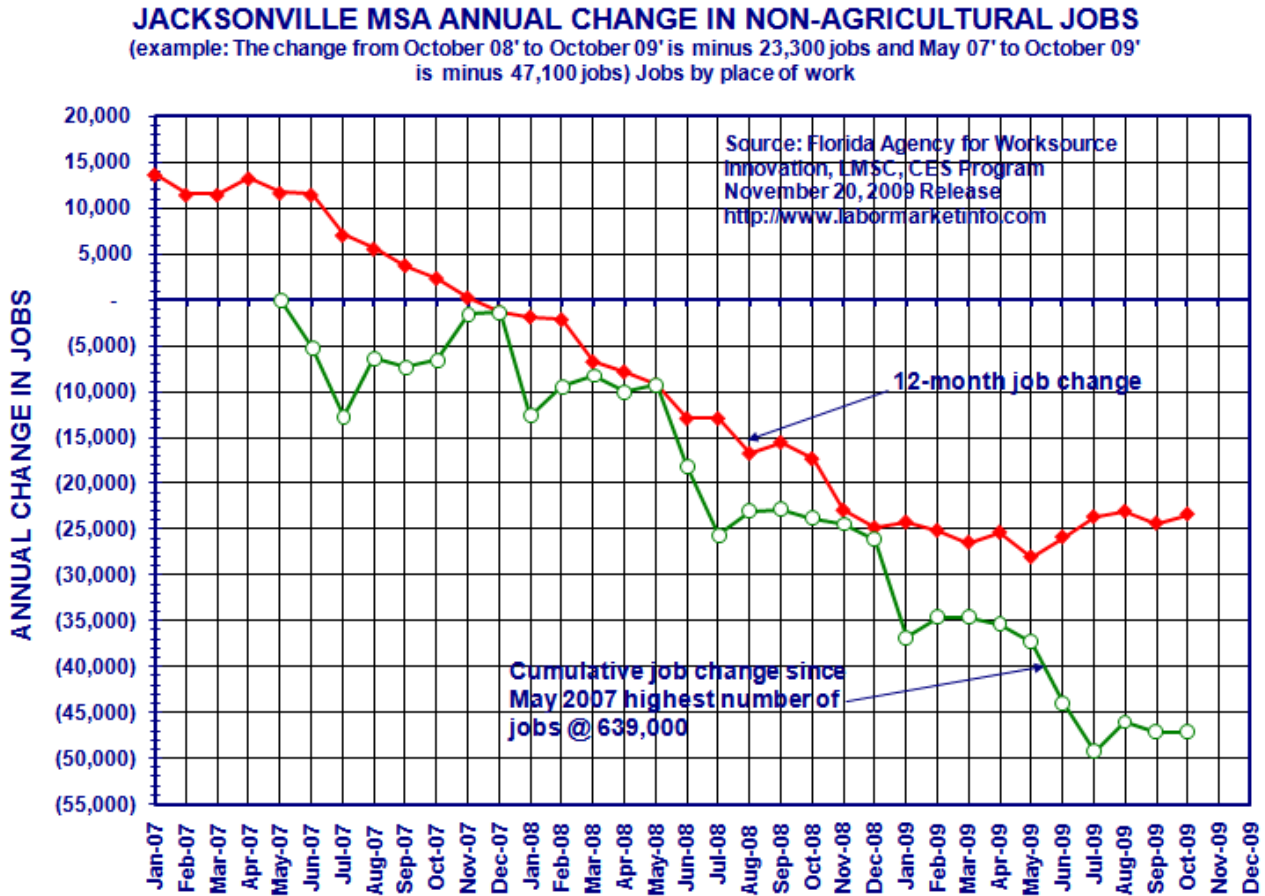
- **Enhance Medical Education and Research in Jacksonville**
- **Foster the Healthcare and Bioscience Industry**
- **Improve Health and Patient Care (Quality and Safety, Access, Disparities and Wellness)**
- **Advance Health Information Technology**

Seeking Solutions through Caring, Ethics and Science

Enhancing Our Region of Excellence in Medical Care, Education and Research

Current Job Growth Difficulties

The Jacksonville MSA lost 47,100 jobs since the peak in May 2007.



Economic Recovery

It may be 2013 before Jacksonville recovers from this job loss. The Healthcare and Bioscience job sector may provide a real opportunity for more rapid job creation and become the defining industry for the first part of the 21st century.

Jacksonville Milestones by Decade	
1960s	Consolidated government enacted
1970s	University of North Florida founded
1980s	Mayo Clinic in FL established
1990s	NFL Team awarded
2000s	Healthcare and Bioscience Industry Growth

CHANGING FLORIDA'S DNA

Orlando's Medical City is a big step toward critical mass for the state's biotech initiative.

By Mark Howard



1 Burnham Institute for Medical Research (open)

COST: \$85 million

SIZE: 175,000 square feet

STAFF: Ultimately 303, including 30 lead scientists

SALARIES AND BENEFITS: \$27.8 million

FOCUS: Research into diabetes, obesity, cardiovascular disease, cancer and drug discoveries

NOTABLE: Burnham is one of only four NIH comprehensive centers for chemical biology and drug discovery in the nation. One of Burnham's research areas at Lake Nona uses a \$12-million robotic "Ultra High Throughput Chemical Screening System" that can screen more than 2 million chemical compounds per day.



2 University of Central Florida College of Medicine (2010) and Burnett School of Biomedical Sciences (opening this year)

COST: Medical college, \$98 million; Burnett School, \$68 million

SIZE: Medical college, 198,000 square feet; Burnett School, 170,000 square feet

FACULTY AND STAFF: 412 (full and part time)

SALARIES AND BENEFITS: \$40.6 million

NOTABLE: The first 41-member class began studies this year, all with fully funded scholarships, at the UCF campus. The medical education program moves to Lake Nona in May. Biomedical researchers move into the Burnett building this year. There are also plans to relocate UCF's College of Nursing to Lake Nona.



3 Nemours Children's Hospital (2012)

COST: \$380 million

SIZE: 630,000 square feet

STAFF: 2,600 projected

SALARIES AND BENEFITS: \$81 million projected

NOTABLE: The hospital will have 95 beds. The 60-acre health campus will feature a children's outpatient specialty clinic, an emergency department and education and research centers.



4 Orlando Veterans Affairs Medical Center (2012)

COST: \$665 million

SIZE: 1.2 million square feet

STAFF: 2,101 projected

SALARIES AND BENEFITS:

\$262 million projected

NOTABLE: The hospital will serve more than 400,000 veterans in central Florida with 134 hospital beds, 120 community living center beds and an outpatient clinic. The center also has a 60-bed residential rehabilitation program.



5 University of Florida Academic and Research Center (planned)

COST: \$61 million

SIZE: 100,000 square feet

STAFF: 120, serving 200 students

NOTABLE: The center will house a Comprehensive Drug Development Center, including a Ph.D. program; a College of Pharmacy that will move from Apopka; and 15 biomedical research laboratories.



6 M.D. Anderson Cancer Research Institute (opening this year)

SIZE: The institute will move to 30,000 square feet on the fifth floor of UCF's Burnett School building (photo above), paying the university \$2.5 million to occupy space for up to five years as M. D. Anderson Orlando plans and builds a freestanding research facility at Medical City. The institute includes 25 researchers and could triple in size after the freestanding facility is constructed.