

The word "FLORIDA" is written in a large, white, serif font. The letter 'O' is replaced by a white outline of the state of Florida. The background is a dark blue with a complex circuit board pattern of glowing lines and dots.

FLORIDA

AUTOMATED

VEHICLES

A thick, white, curved swoosh underline that spans across the bottom of the text, starting from the left and curving upwards on the right side.



**SCAN HERE FOR OUR ONLINE  
BROCHURE**

---





The word "FLORIDA" is written in a large, white, serif font. The letter 'O' is replaced by a white outline of the state of Florida. The background is a dark blue with a complex circuit board pattern of glowing lines and dots.

FLORIDA

AUTOMATED

VEHICLES

A thick, white, curved swoosh underline that spans across the bottom of the text, starting under the 'A' and ending under the 'S'.



# Leadership and Innovation Award

---



**Senator Jeff Brandes**  
**FAV Founder & President**  
**Florida Policy Project**



**Greg Slater**  
**Executive Director & CEO**  
**THEA**



# Leadership and Innovation Award

---



**Joe Lopano**  
**CEO, Tampa**  
**International Airport**



The word "FLORIDA" is written in a large, white, serif font. The letter 'O' is replaced by a white outline of the state of Florida. The background is a dark blue with a complex circuit board pattern of glowing lines and dots.

FLORIDA

AUTOMATED

VEHICLES

A thick, white, curved swoosh underline that spans across the width of the text below it.



# The Intersection of Housing, Population and Transportation

---



**Lesley Deutch**  
Managing Principal, John Burns  
Research & Consulting



# The Intersection of Housing, Population and Transportation

September 5, 2024



**Lesley Deutch**  
*Managing Principal*  
[ldeutch@jbrec.com](mailto:ldeutch@jbrec.com)

561-252-0175






**850+**  
Reports



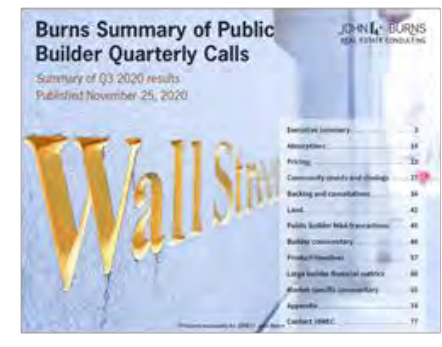
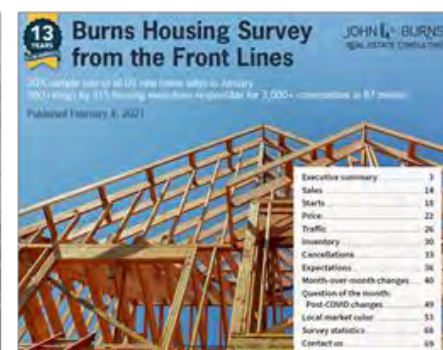
**118**  
Markets



**34**  
States



**45**  
Consultants







## Key Demographic Shifts



## What Developers are Thinking



## Implications for Florida



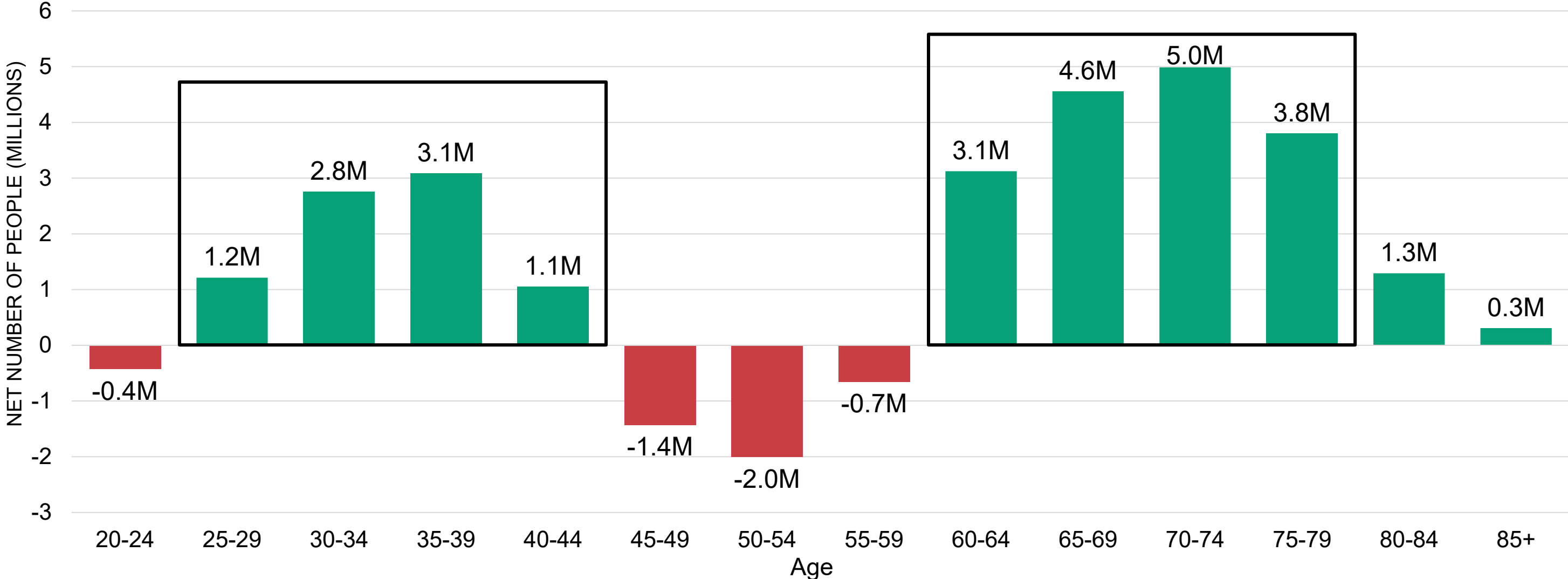
# Key Demographic Shifts





# US population shifts over the last 10 years have benefited suburban growth. The US population increased among 25–44 and 60+ year-olds.

### 2013-2023 US Net Population Growth by Age Group (Millions)

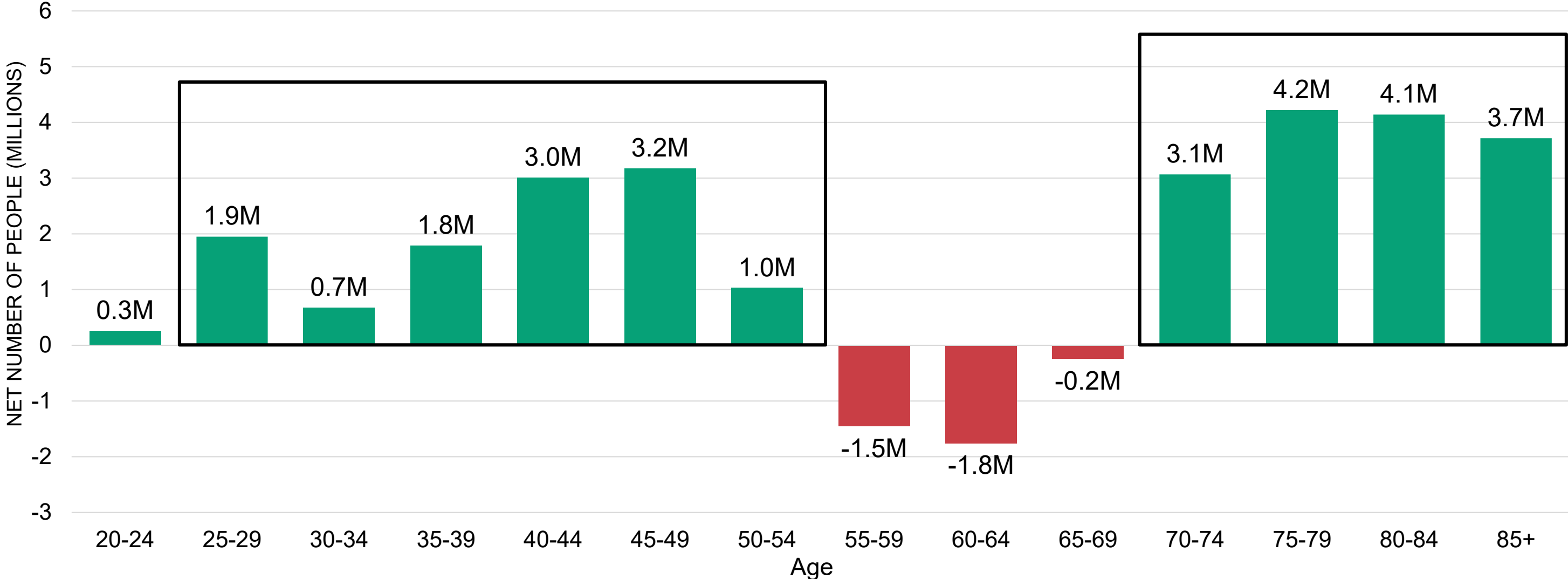


Sources: John Burns Research and Consulting, LLC, tabulations of US Census Bureau Population Estimates (Data: Dec-23, Pub: Jun-24)



# Over the next decade, US population growth will shift to 70+ and 25–54 age groups, which will drive suburban US housing demand.

### 2023-2033 US Net Population Growth by Age Group (Millions)



Sources: John Burns Research and Consulting, LLC, tabulations of US Census Bureau Population Estimates (Data: Dec-23, Pub: Sep-24)



**Surban areas  
will continue to  
grow.**

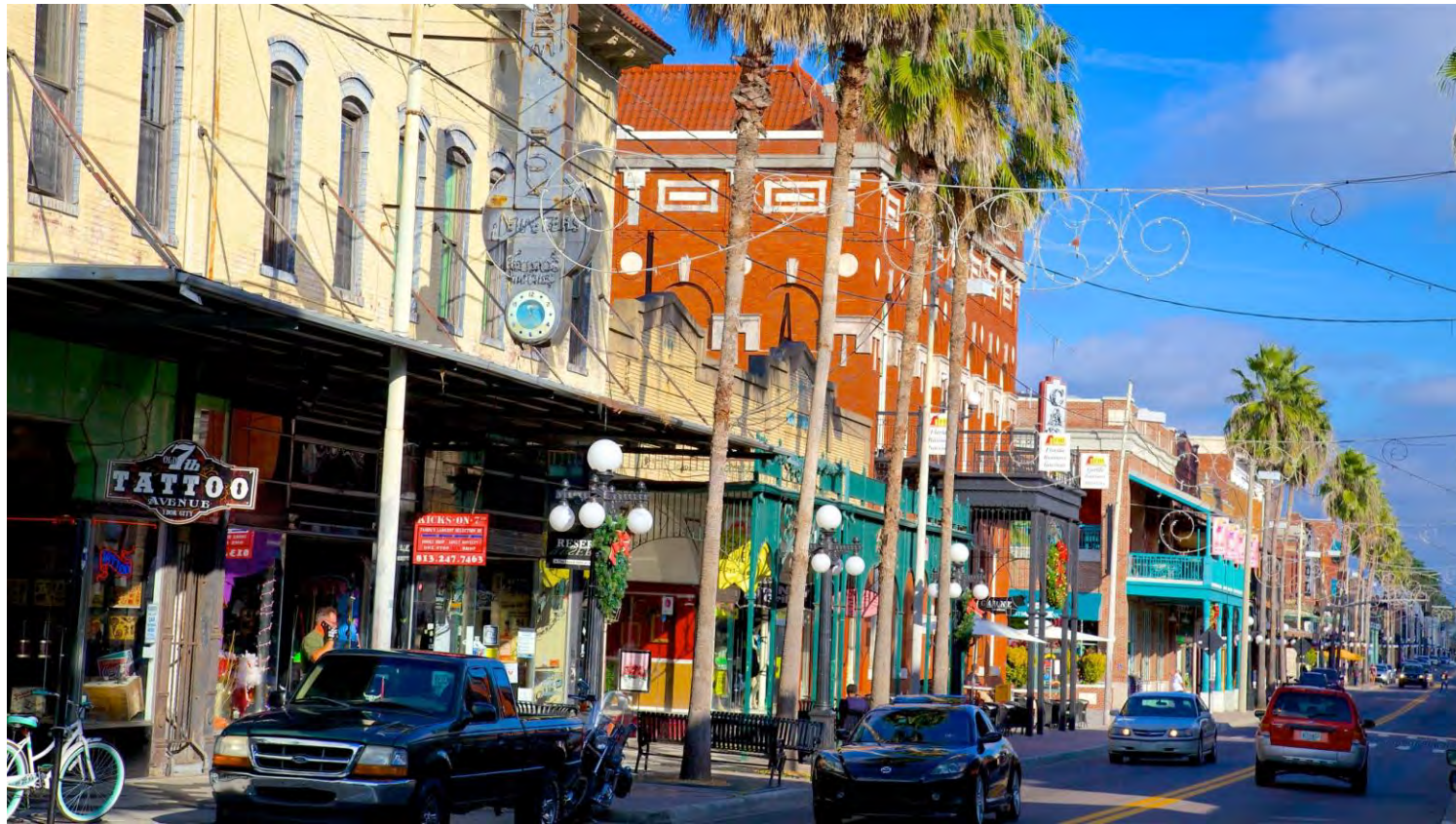
what is  
**SURBAN™** ?

*A suburban area that has the feel of an urban area,  
containing some or all of the following:*



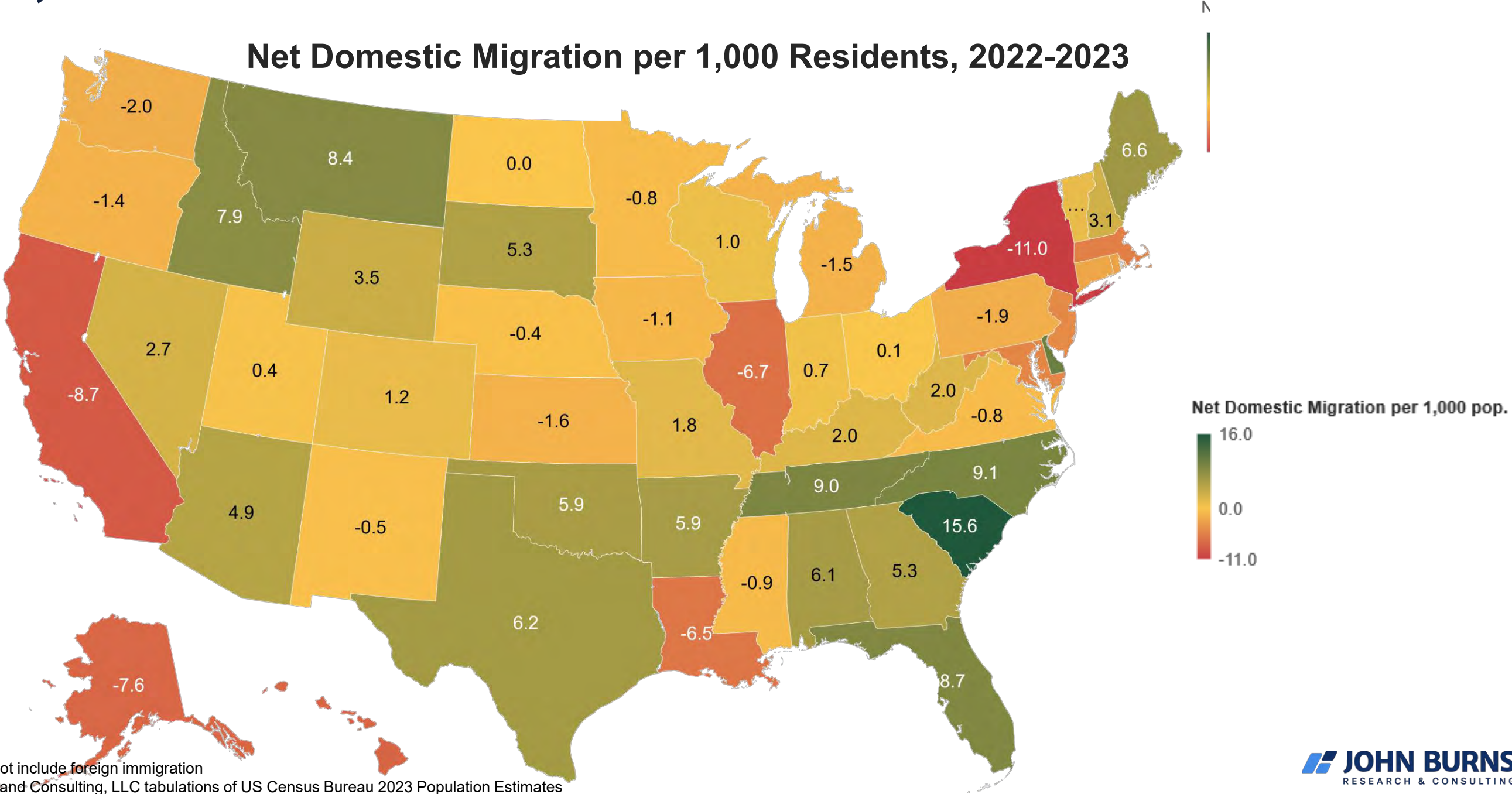


# Florida has great examples of Surban living.





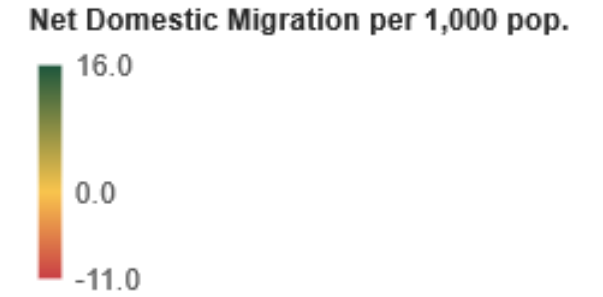
# Domestic migration clearly favoring Florida, Texas and the Southeast. California, New York and Illinois lose.



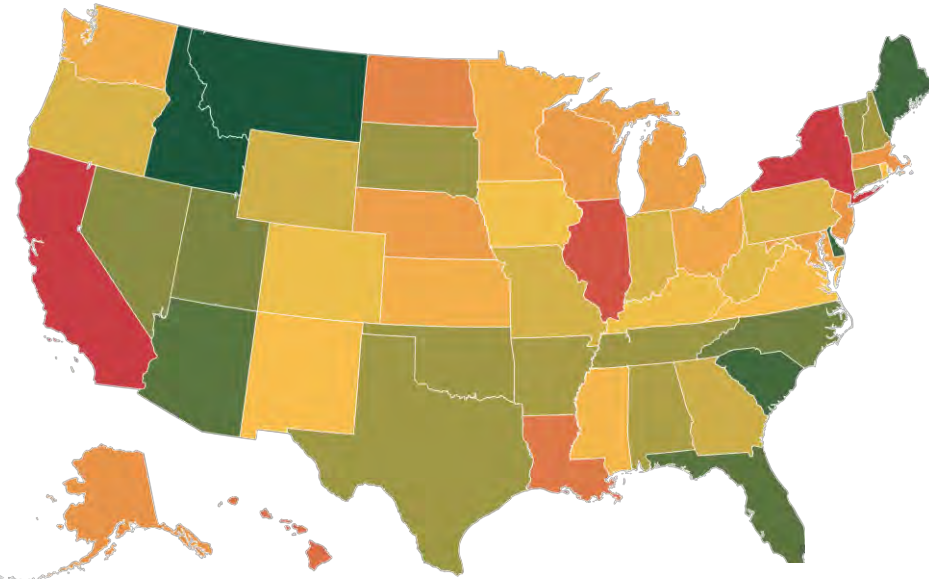


# Comparing across the last 3 years, migration has moderated.

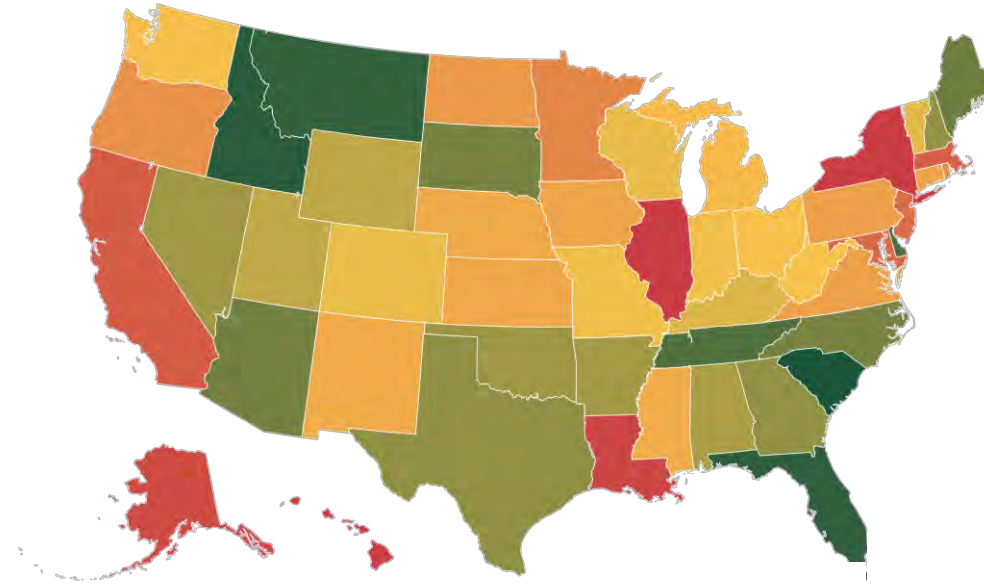
## Net Domestic Migration per 1,000 Residents



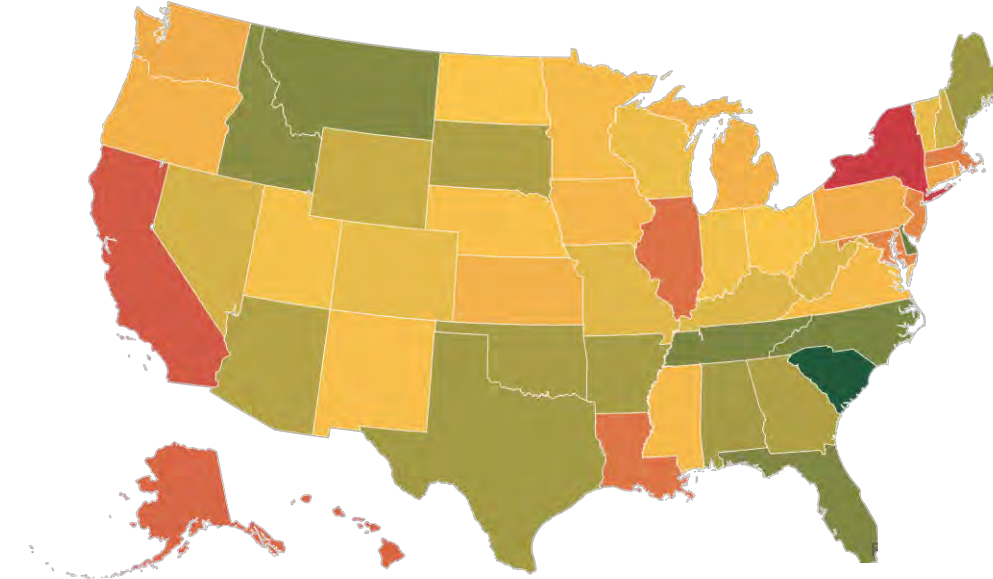
2020-2021



2021-2022



2022-2023



### Moderation went both ways in 2023:

- Most states with positive migration gained fewer people and
- Most states with negative migration lost fewer people

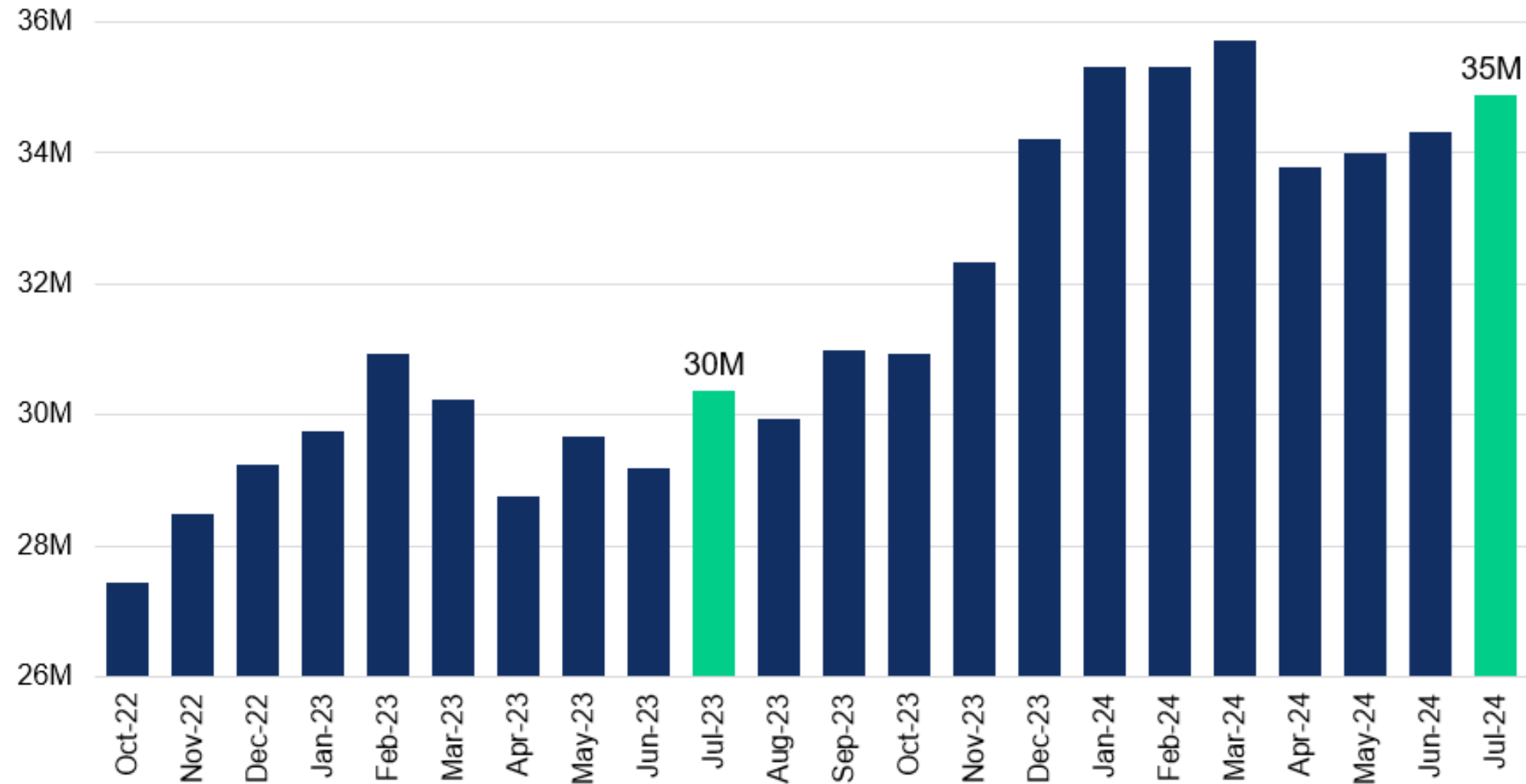
\*Domestic moves only. Does not include foreign immigration  
Source: John Burns Research and Consulting, LLC tabulations of US Census Bureau 2023 Population Estimates



# 5 million more US employees are working from home part of the week than one year ago.

## US Hybrid and Remote Workers

Number working from home at least 1 day per week

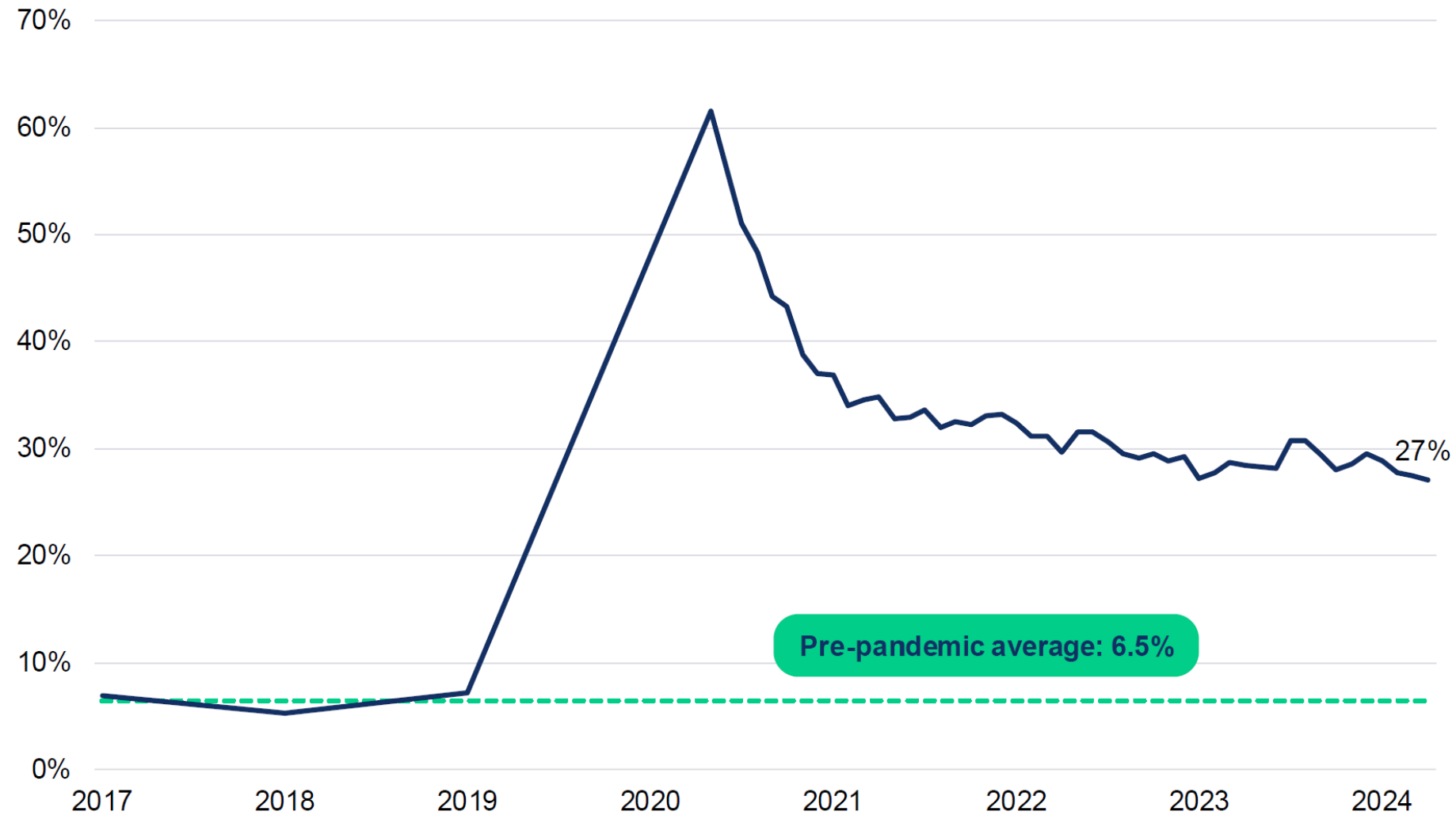


Sources: Bureau of Labor Statistics, John Burns Research and Consulting, LLC (Data: Jul-24; Pub: Sep-24)



# Remote and hybrid work allow commuters to move to the suburbs.

US Work-from-Home Share (% of Full Workdays)



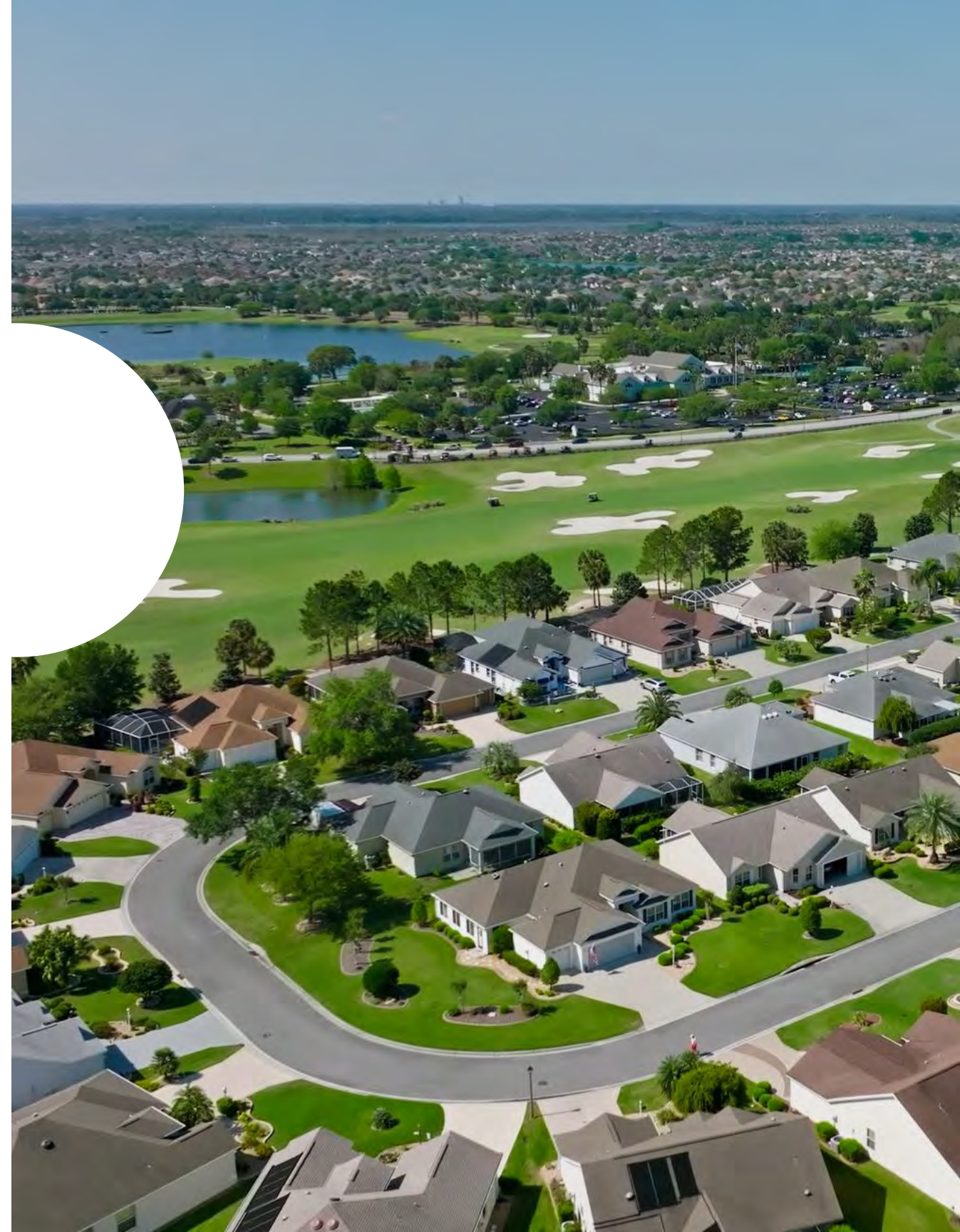
## The Shift Enables:

- 1 Workers can move to lower-cost locations
- 2 Demand for goods and services (lunch, errands) in the suburbs
- 3 Demand rises for spaces that combat loneliness of WFH

Source: WFH Research tabulations of American Time Use Survey (2003–2019) and Survey of Working Arrangements and Attitudes designed by WFH Research (Data: Apr-24; Pub: Jun-24)



# What are **Developers** Thinking?





**While technology is a large component for developers, autonomous vehicle adoption is still in its infancy.**



## Design Principles

Innovation and Technology is becoming a major design principle in master planned communities



## Sustainability

Sustainable transportation is gaining traction in MPCs; behind biodiversity and conservation



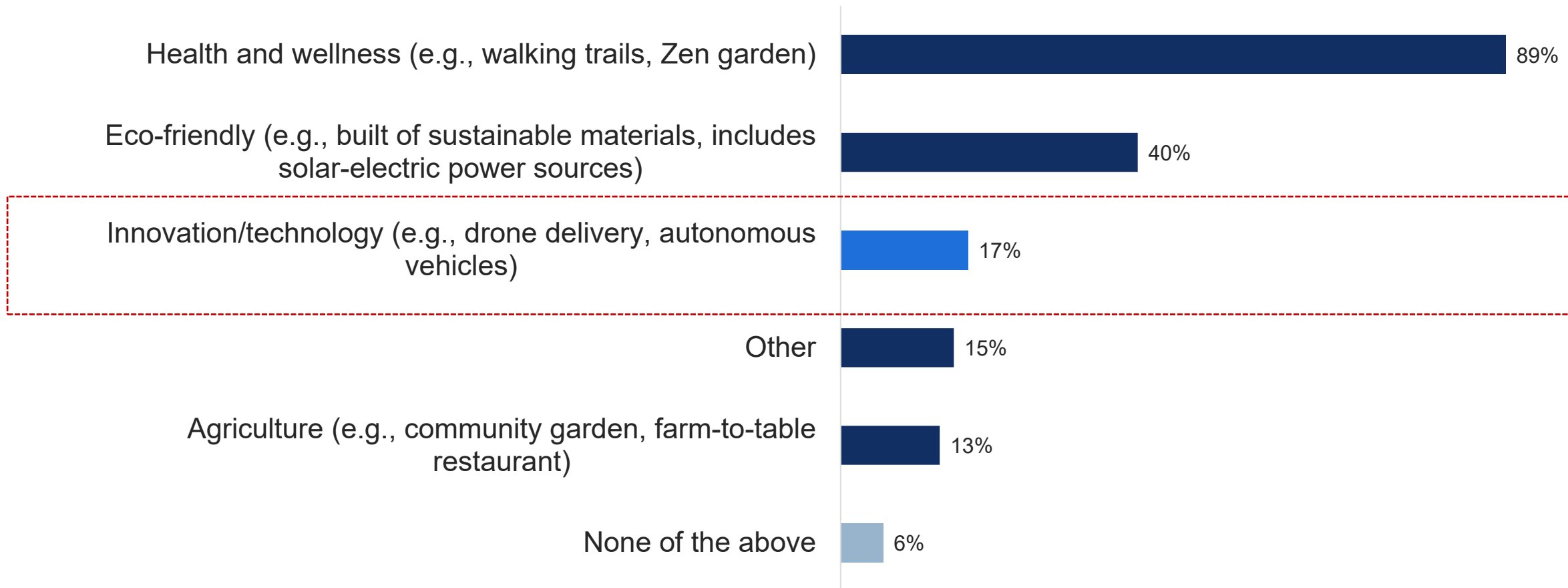
## Autonomous Vehicles

Few are strongly considering autonomous vehicles



# Innovation/technology (e.g., drone delivery, autonomous vehicles) is a design principle for nearly 1 in 5 master plan developers.

**Master plan design principle(s)**  
*Share of master plan developers*



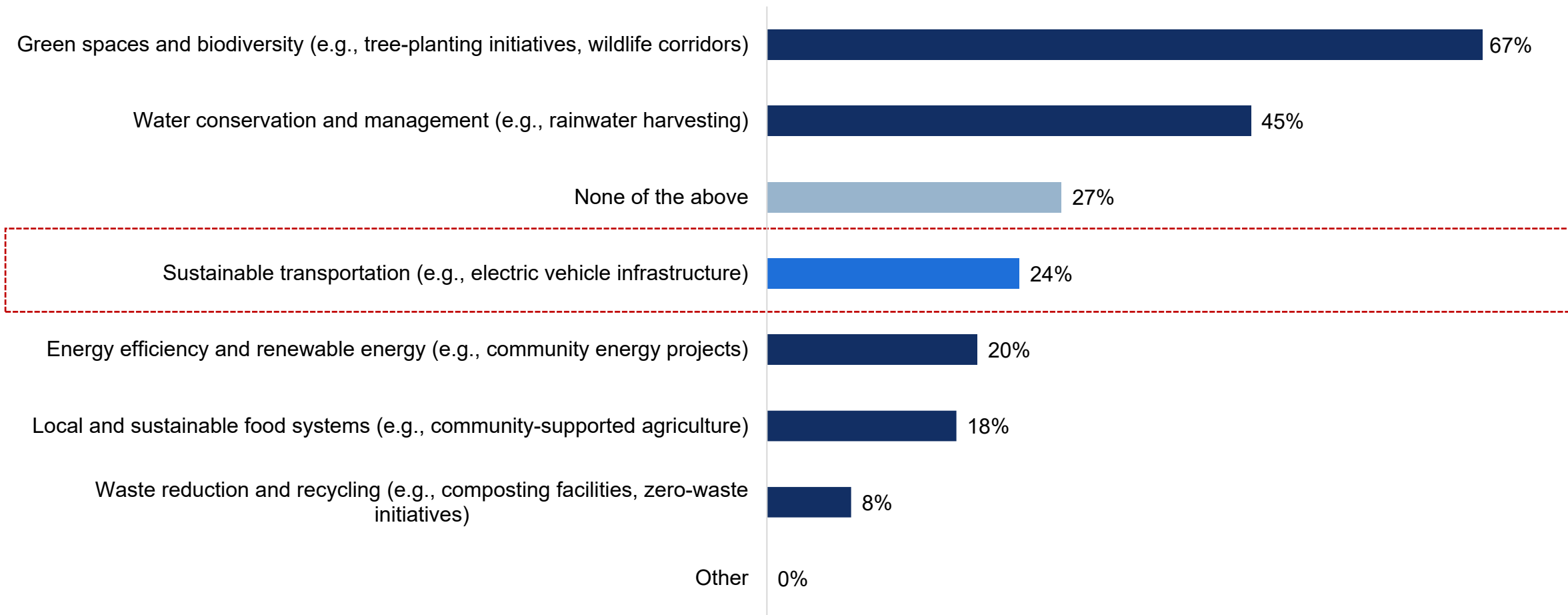
Respondents were instructed to select all that applied. Results will not total to 100%.

Source: New Home Trends Institute by John Burns Research and Consulting, LLC  
2024 survey of 55 master-planned communities across the US.



# About a quarter of master plan developers surveyed are focused on promoting sustainable transportation in their communities.

## Current and future sustainable efforts being planned for *Share of master plan developers*



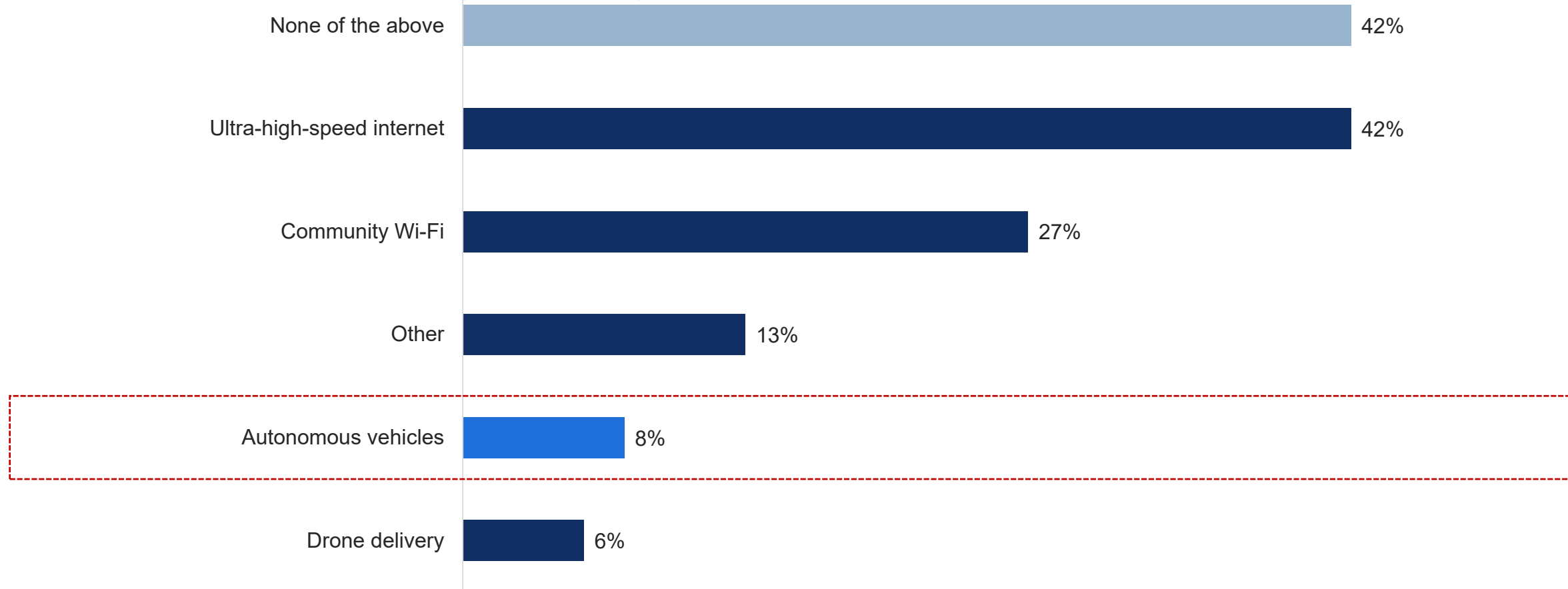
Respondents were instructed to select all that applied. Results will not total to 100%.

Source: New Home Trends Institute by John Burns Research and Consulting, LLC  
2024 survey of 55 master-planned communities across the US.

# Less than 1 in 10 master plans are considering autonomous vehicles for their communities.

## Innovative feature(s) being considered for inclusion in master-planned community

Share of master plan developers



Respondents were instructed to select all that applied. Results will not total to 100%.

Source: New Home Trends Institute by John Burns Research and Consulting, LLC  
2024 survey of 55 master-planned communities across the US.



Florida is **Growing!**

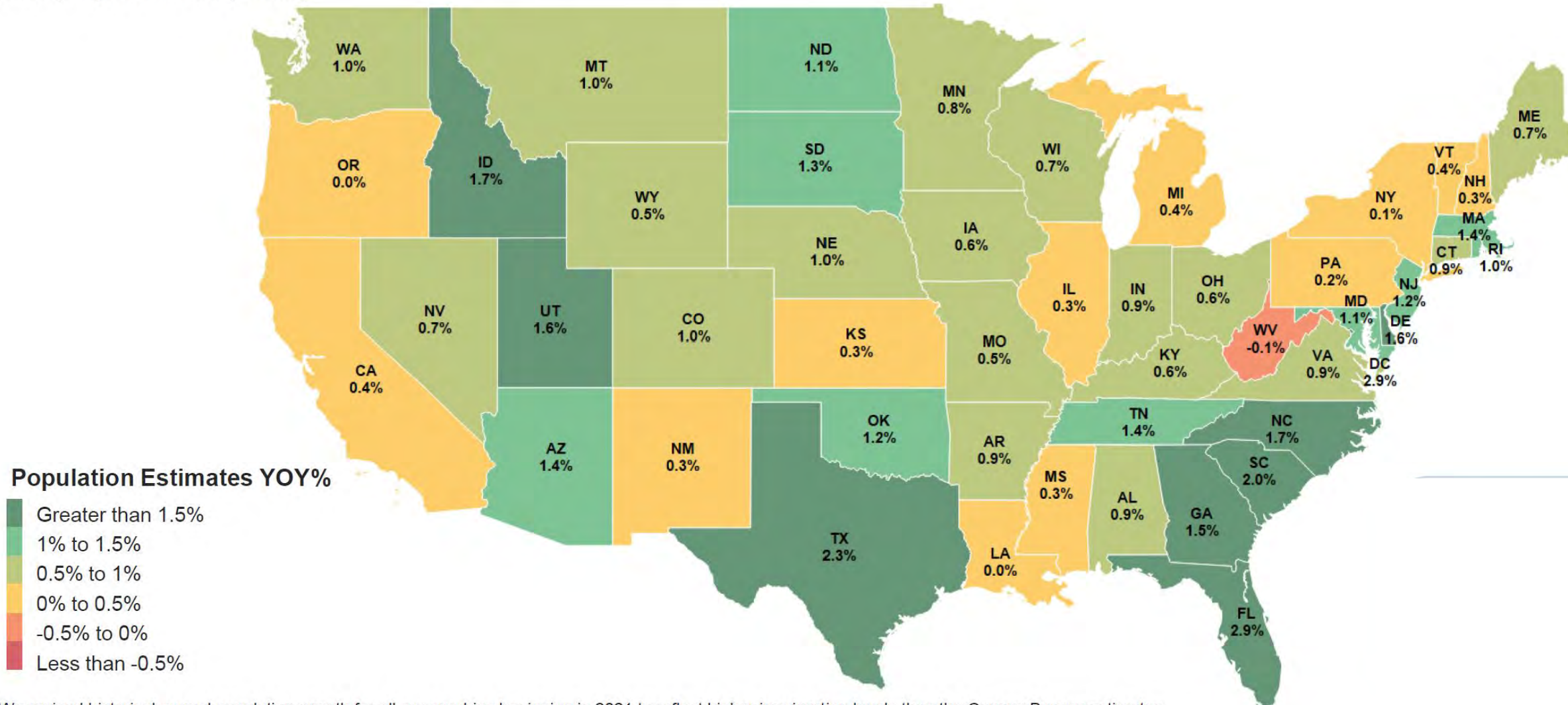




# Florida is the fastest-growing state in the US...based on population growth.

## JBREC Estimates of United States Population Growth

YOY (July 2022 to July 2023)



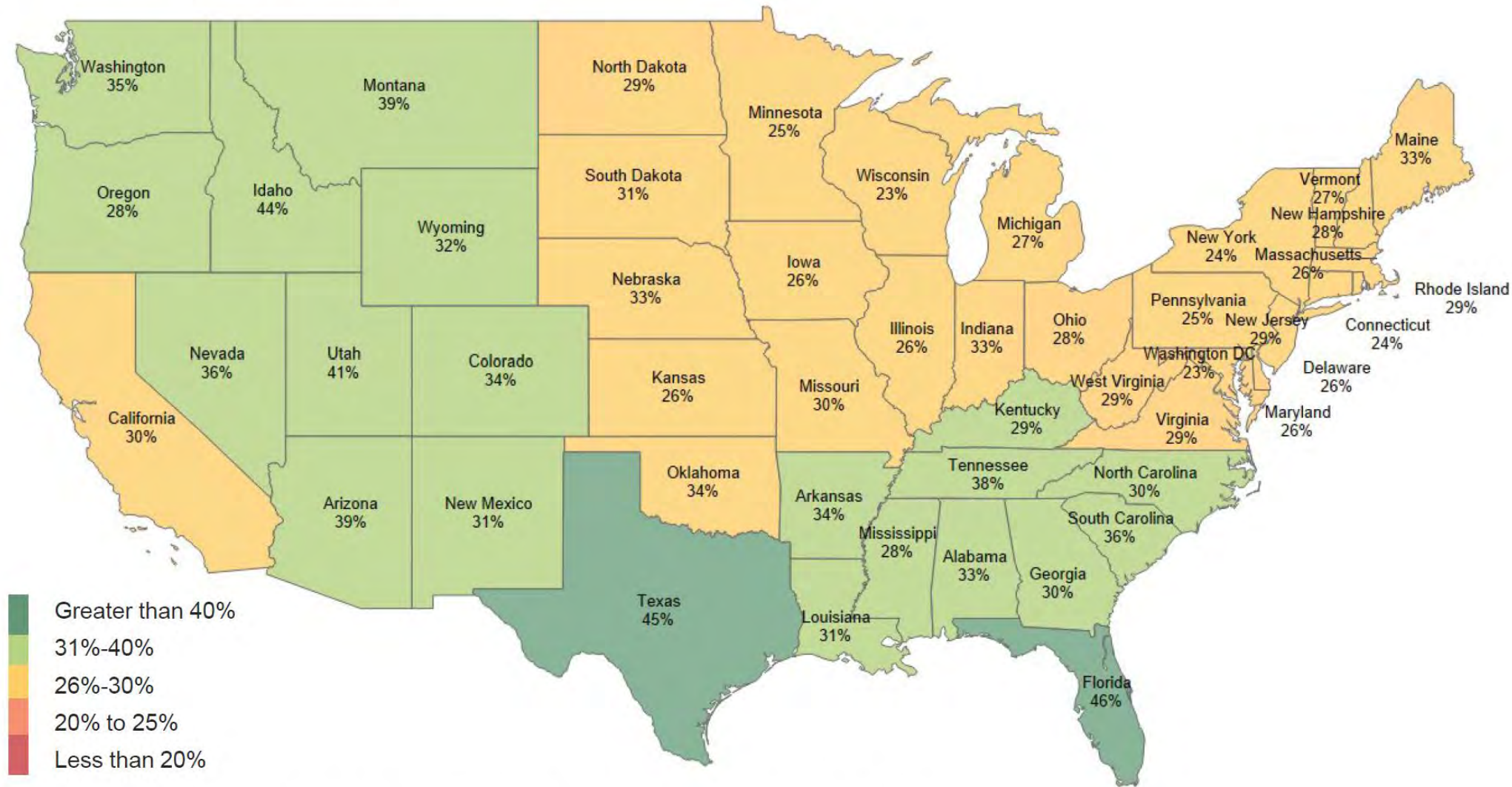
We revised historical annual population growth for all geographies beginning in 2021 to reflect higher immigration levels than the Census Bureau estimates.  
 Source: John Burns Research and Consulting, LLC estimates based on U.S Census Population Estimates, adjusted for immigration (Data: 2023; pub: jul-24)



# Florida is the fastest-growing state in the US... based on job growth.

## 4-Year Aggregated GDP Growth % by State / Region (JBREC Definitions)

Outline shows Regions by JBREC Definition



Region	4-Year Growth
Florida	46%
Texas	45%
Southwest	37%
Northwest	33%
Southeast	32%
California	30%
Midwest	28%
Northeast	26%

Source: Bureau of Economic Analysis & John Burns Research and Consulting, LLC (Data: 1Q24, Pub: Jul-24)

# Who lives here?

22.8

Million residents



9.0

Million households



\$75K

Median Household Income



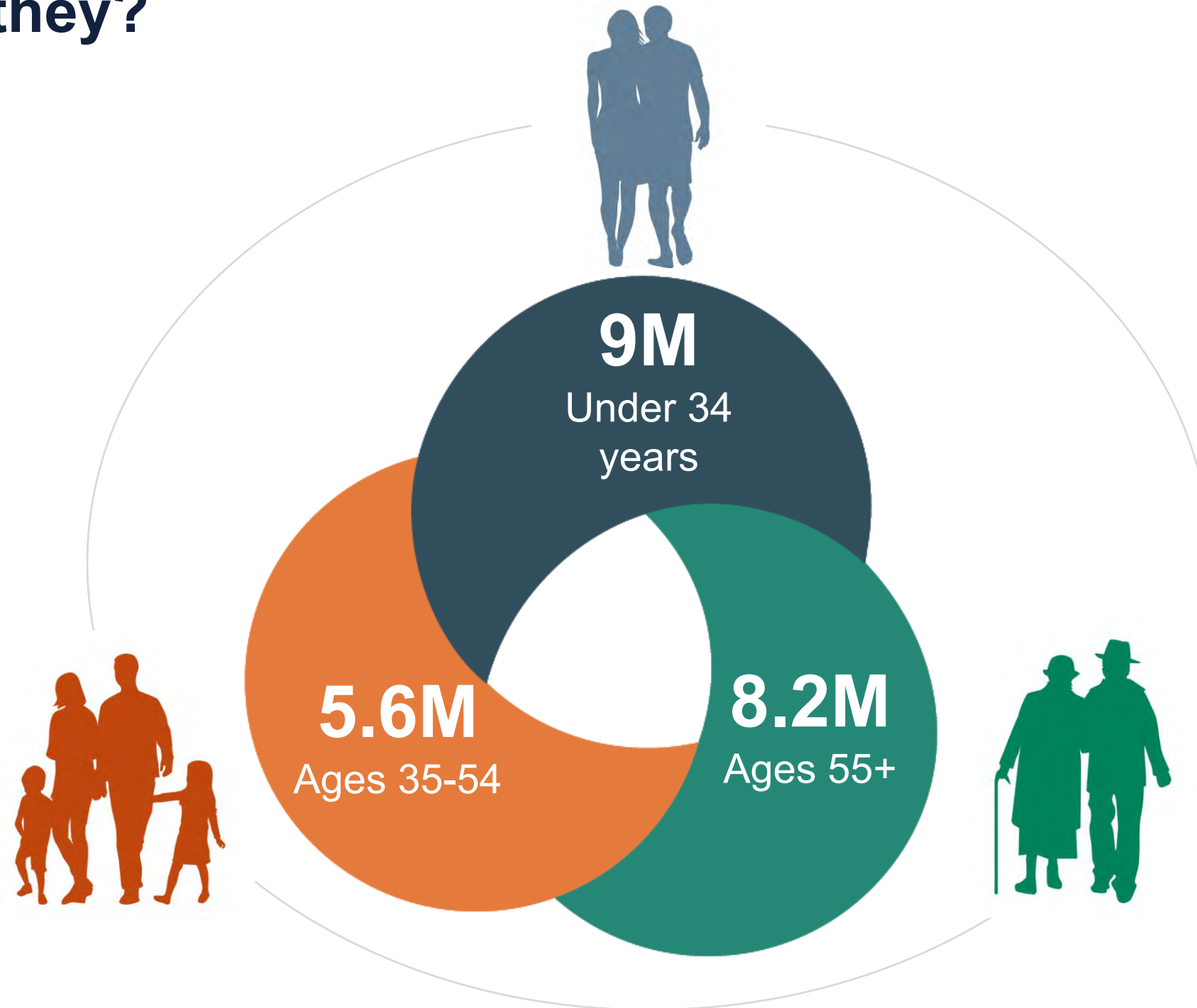
43.5

Median Age






# And who are they?



# Where do they live?



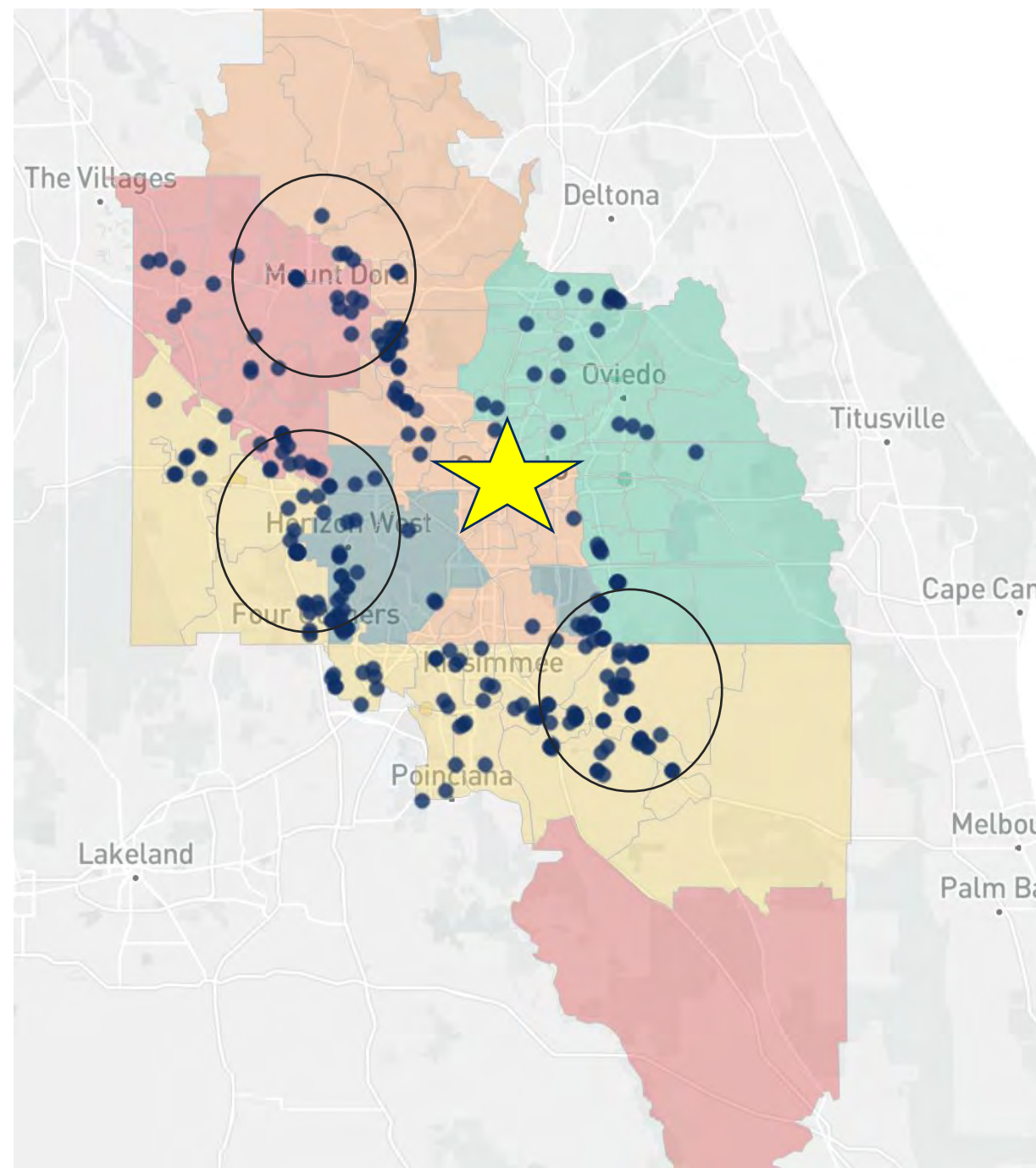
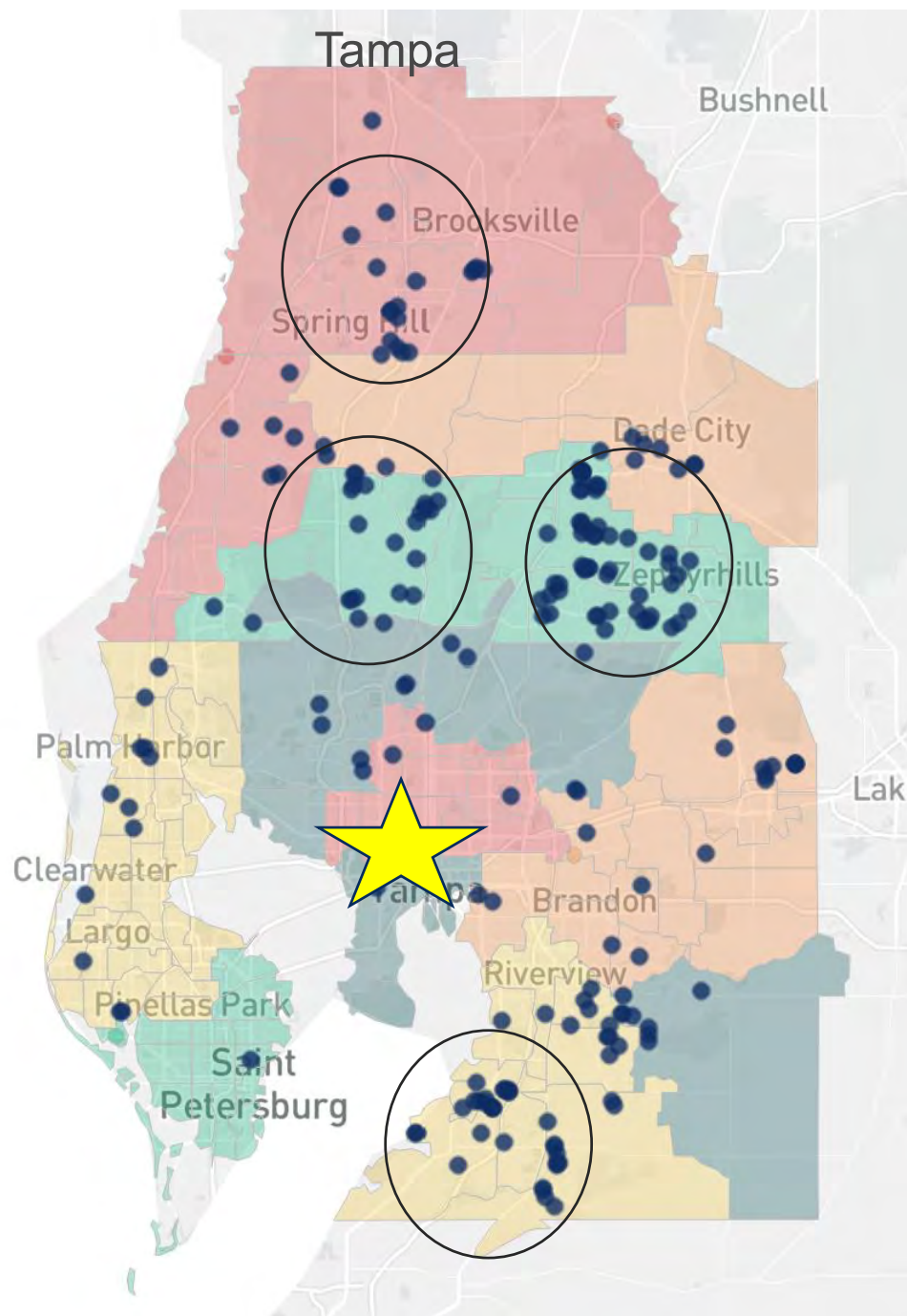
1 Dot = 2,900

 2024 Total Population

Esri, HERE, Garmin, NGA, USGS, N



# Most new construction is in the suburbs, where land is available.



Florida has 5 of the top-selling MPCs.

The Villages®



LAKEWOOD RANCH™  
FLORIDA



WELLEN  
PARK



BABCOCK RANCH  
FLORIDA

SILVERLEAF®

**JOHN BURNS**  
RESEARCH & CONSULTING

**TOP 50**  
Master-Planned  
Communities

Ranking	Project Name and Location	Developer	Net Sales		YOY
			2023	2022	
1	The Villages, The Villages, FL	The Villages of Lake Sumter, LLC	3,029	3,923	-23%
2	Lakewood Ranch, Sarasota, FL	Schroeder-Manatee Ranch, Inc.	2,187	1,846	18%
3	Sunterra, Houston, TX	Starwood Land	1,293	653	98%
4	Summerlin, Las Vegas, NV	Howard Hughes Holdings Inc.	1,090	782	39%
5	Ontario Ranch, Riverside-SB, CA	Brookfield, DR Horton, Lennar, Lewis, Stratham	1,027	646	59%
6	Bridgeland, Houston, TX	Howard Hughes Holdings Inc.	985	567	74%
7	Cadence, Las Vegas, NV	LandWell Companies	964	571	69%
8	Babcock Ranch, Fort Myers, FL	Kitson & Partners	958	934	3%
9	SilverLeaf, Jacksonville, FL	Hutson Companies	902	1,034	-13%
10	Wellen Park, Sarasota, FL	Wellen Park, LLLP	870	722	20%









# LAKE NONA®







TRADITION



# Bring More Closer to Home



Wing<sup>↑</sup>

Google's drone delivery business, is piloting delivery in suburban Frisco

**nuro**  
expanded its autonomous delivery in Houston to include Uber Eats





# Questions?

September 5, 2024



**Lesley Deutch**  
*Managing Principal*  
[Ideutch@jbrec.com](mailto:Ideutch@jbrec.com)

561-252-0175



The word "FLORIDA" is written in a large, white, serif font. The letter 'O' is replaced by a white outline of the state of Florida. The background is a dark blue with a complex circuit board pattern of glowing lines and dots.

FLORIDA

AUTOMATED

VEHICLES

A thick, white, curved swoosh underline that spans across the bottom of the text, starting under the 'A' and ending under the 'S'.



# At the Intersection of Driving and Autonomy

---



**Lando Juarez**

**Head of Legal, Uber Autonomous Mobility  
& Delivery and Global Fleets Businesses**



**Senator Jeff Brandes**

**FAV Founder, Florida Policy Project  
President**



The word "FLORIDA" is written in a large, white, serif font. The letter 'O' is replaced by a white outline of the state of Florida. The background is a dark blue with a complex circuit board pattern of glowing lines and dots.

FLORIDA

AUTOMATED

VEHICLES

A thick, white, curved swoosh underline that spans across the bottom of the text, starting under the 'A' and ending under the 'S'.



# The Business of Aeroport and EVTOL Readiness

---



**Moderator:**  
**Gina Dew**  
Director, Government &  
Community Relations, Tampa  
International Airport



**Phillip Brady**  
US Acquisitions and  
Partnership Manager,  
Skyports Infrastructure



**J.C. Asencio**  
State/Local Ecosystems  
Partnership Manager, Wisk  
Aero



**Nelson Mejias**  
Aviation Planning  
Administrator, FDOT  
Aviation Office



The word "FLORIDA" is written in a large, white, serif font. The letter 'O' is replaced by a white outline of the state of Florida. The background is a dark blue with a complex circuit board pattern of glowing lines and dots.

FLORIDA

AUTOMATED

VEHICLES

A thick, white, curved swoosh underline that spans across the width of the text below it.



# At the Intersection of Safety, Insurance and Automation

---



**Moderator:**  
**Mike Scrudato**  
Principal, Verisk



**Eric Teoh**  
Director of Statistical Services,  
Insurance Institute for Highway  
Safety



**Sergey Litvinenko**  
Co-Founder/CEO  
Koop



**Todd Inman**  
National Transportation  
Safety Board  
Board Member



# Crash and fatality prevention with ADS and ADAS...in like 5 minutes

FAV Summit

September 5, 2024



**Eric Teoh**  
Director of Statistical Services





**Will something prevent lots of crashes and fatalities?**

Three dimensions of benefit

Relevance

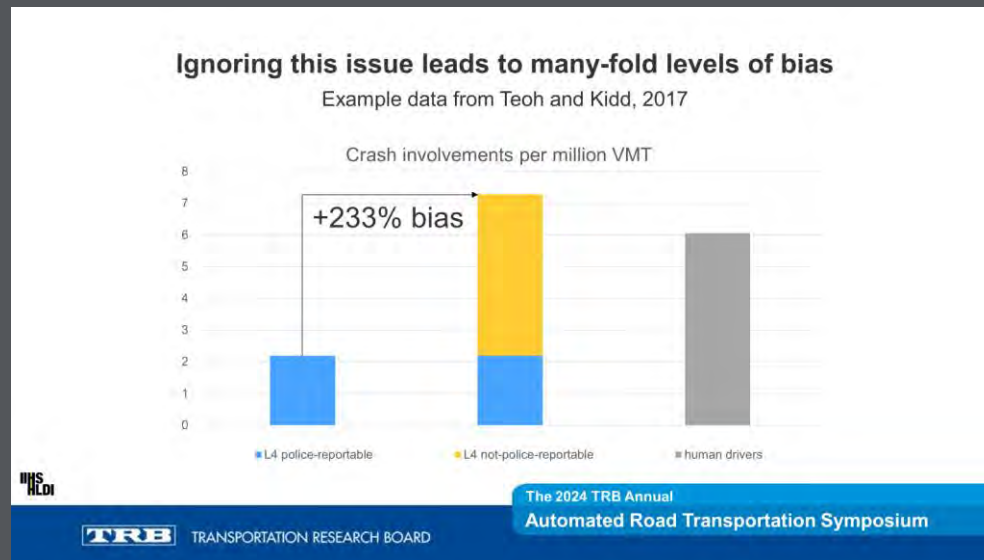
Effectiveness

Implementation



# SAE Level 4

- ▶ Relevant to many types of crashes
- ▶ Promising early results for effectiveness
- ▶ Not widely deployed



- ▶ IIHS study using SGO data underway
- ▶ Also, lots of challenges when studying L4
- ▶ RAVE Checklist partnership, 2024, available at [www.iihs.org/news](http://www.iihs.org/news)

# SAE Level 2

- ▶ Relevance to crashes is unclear
- ▶ Overall effectiveness  $\approx 0$ , but lots of risks
- ▶ More widely deployed than L4 (can buy it)



- ▶ Opportunity for misunderstanding, misuse, etc.
- ▶ Has resulted in high-profile fatal crashes
- ▶ IHS Safeguards rating system, available at <https://www.ihs.org/ratings/partial-automation-safeguards>



# SAE Level 0

- ▶ Relevant to most common crash types
- ▶ Some prevent 50% of relevant crashes
- ▶ Most widely deployed (e.g., AEB mandated)



- ▶ Fleet penetration continues to increase
- ▶ Relevance and effectiveness improve over time
- ▶ IIHS FCP 2.0 test (higher speeds, motorcycle/truck detection), IIHS nighttime pedestrian AEB testing

# Why not use technology to help drivers behave?





**The Insurance Institute for Highway Safety (IIHS)** is an independent, nonprofit scientific and educational organization dedicated to reducing deaths, injuries and property damage from motor vehicle crashes through research and evaluation and through education of consumers, policymakers and safety professionals.

**The Highway Loss Data Institute (HLDI)** shares and supports this mission through scientific studies of insurance data representing the human and economic losses resulting from the ownership and operation of different types of vehicles and by publishing insurance loss results by vehicle make and model.

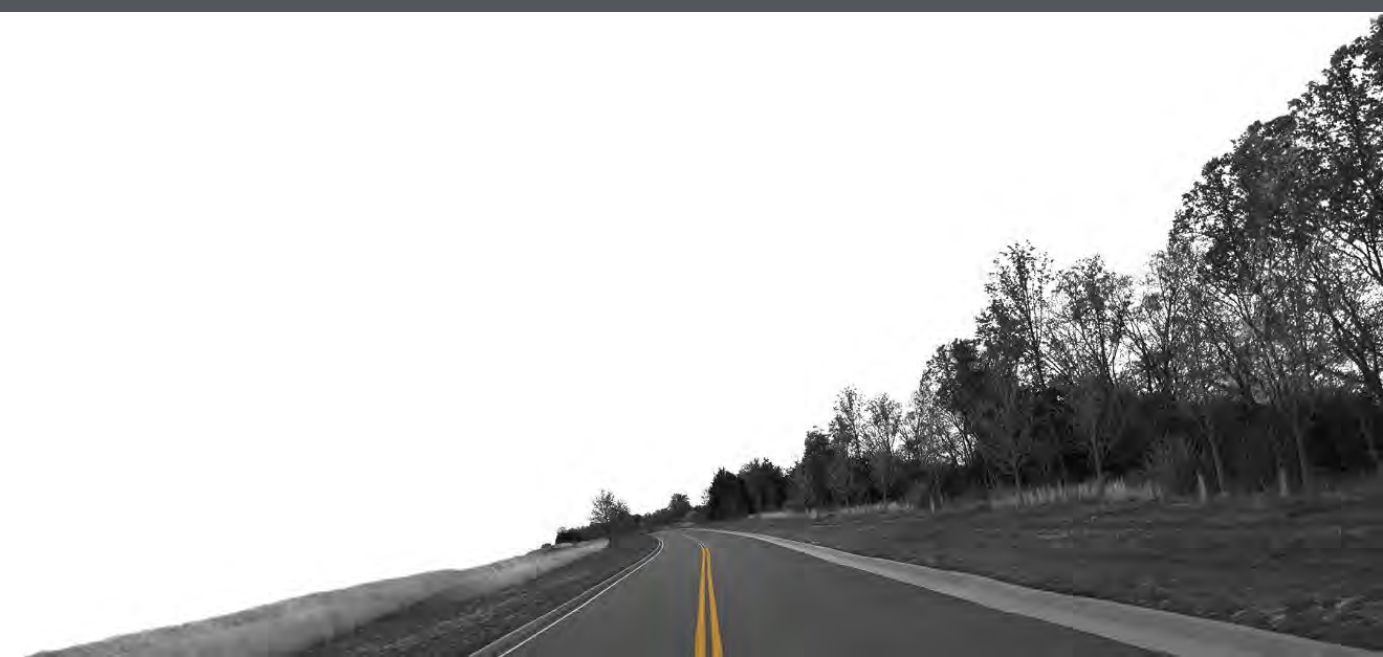
Both organizations are wholly supported by auto insurers.

**iihs.org**

-  /iihs.org
-  @IIHS\_autosafety
-  @iihs\_autosafety
-  IIHS
-  /company/iihs-hldi
-  @iihs\_autosafety



**Eric Teoh**  
Director of Statistical Services  
eteoh@iihs.org





The word "FLORIDA" is written in a large, white, serif font. The letter 'O' is replaced by a white outline of the state of Florida. The background is a dark blue with a complex circuit board pattern of glowing lines and dots.

FLORIDA

AUTOMATED

VEHICLES

A thick, white, curved swoosh underline that spans across the bottom of the text, starting under the 'A' and ending under the 'S'.





# Insuring Automation

FAV Summit  
September 5, 2024

# Autonomous Vehicles



Commercial AVs  
Insurance is **~solved**

Personal AVs  
Insurance **is not solved**



## Responsibility

## Insurance



Human in a driver's seat with  
a steering wheel

Human

Personal Auto Liability



Human in a driver's seat  
without a steering wheel

Robot

OEM's Software  
Errors & Omissions



This is a \$B problem



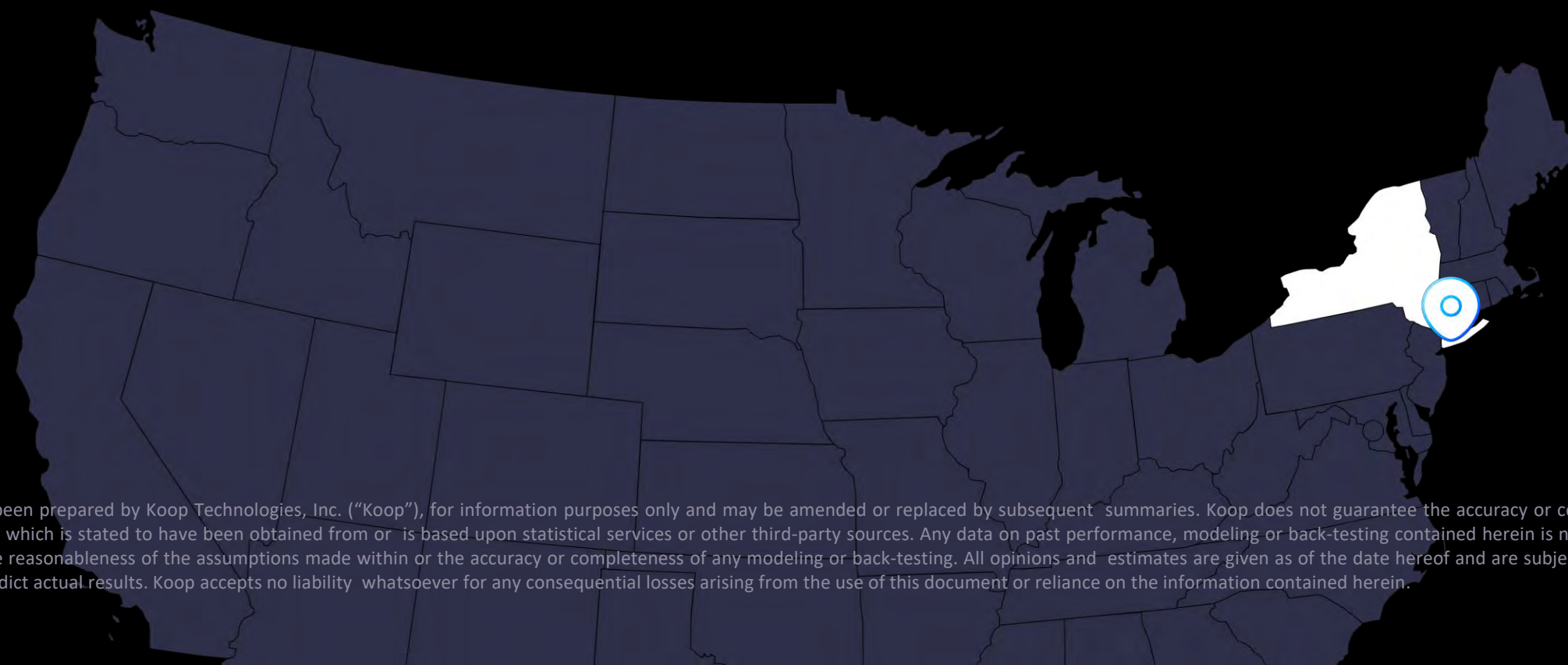
# Thank you!



sergey@koop.ai



New York, NY



Disclaimer: This document has been prepared by Koop Technologies, Inc. ("Koop"), for information purposes only and may be amended or replaced by subsequent summaries. Koop does not guarantee the accuracy or completeness of information which is contained in this document, and which is stated to have been obtained from or is based upon statistical services or other third-party sources. Any data on past performance, modeling or back-testing contained herein is no indication as to future results. No representation is made as to the reasonableness of the assumptions made within or the accuracy or completeness of any modeling or back-testing. All opinions and estimates are given as of the date hereof and are subject to change. The information in this document is not intended to predict actual results. Koop accepts no liability whatsoever for any consequential losses arising from the use of this document or reliance on the information contained herein.

**SCAN HERE FOR OUR ONLINE  
BROCHURE**

---

