



2030 | Insight into Orlando's Future
Growth | Infrastructure | Industry | Workforce & Education



2030

INSIGHT INTO ORLANDO'S FUTURE

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*The content and information in this report does not necessary reflect the opinion or position of the Champions for Broad-Based Prosperity



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| INTRODUCTION



The year 2030 has long been a benchmark for the future; a far-away date. But consider this, the high school graduating class of 2030 is already in the first grade. As 2019 begins, the year 2030 is now close enough to make insightful projections based on current trends and still far enough away for the community to take deliberate action in pursuit of a brighter future.

The years leading up to 2030 will be transformative for Orlando and the United States. Shifting demographic trends mean that seniors will outnumber children for the first time in history.

Educational institutions will need to equip tomorrow's workforce with skills to meet the demands of changing industries. Emerging technologies will create more transportation options that change how people travel. Orlando will lead the nation in these trends and many others.

The Orlando Economic Partnership (the Partnership) serves the seven counties and 95 cities and towns of the Orlando region to advance broad-based prosperity. This means finding regional solutions that address shared current and emerging challenges to create equal access to resources that enable opportunities for all. To support that mission, the Partnership established the Foundation for Orlando's Future to empower the region's leaders with analytical insight, strategic foresight and leadership development to make thoughtful decisions for Orlando's growth.

This report addresses the question of what kind of world today's first graders will enter when they graduate from high school in 2030. The question should inspire thought about Orlando's current path. Using historical trends and a host of data sources, the following outlines a likely set of projections for Orlando's future.



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| A BRIEF NOTE ABOUT REGIONAL DEFINITIONS

The Orlando Metropolitan Statistical Area (MSA) is made up of Lake, Orange, Osceola and Seminole Counties, a region of 2.5 million people.¹ This four-county region is referenced in many data sources as the Orlando-Sanford-Kissimmee MSA.

The Orlando Economic Partnership provides services to and represents the greater seven-county area that also includes Brevard, Polk and Volusia Counties. While the Orlando MSA produced 13 percent of Florida's gross domestic product (GDP) in 2017, the seven-county region produced 20 percent of Florida's (GDP)² and is home to 4.3 million people.³

The following analysis applies to the seven-county region, referred to hereafter as Orlando or the Orlando region. Information is presented at the county or MSA level where data could not be aggregated and is noted as such.

County Population Growth (2017-30)

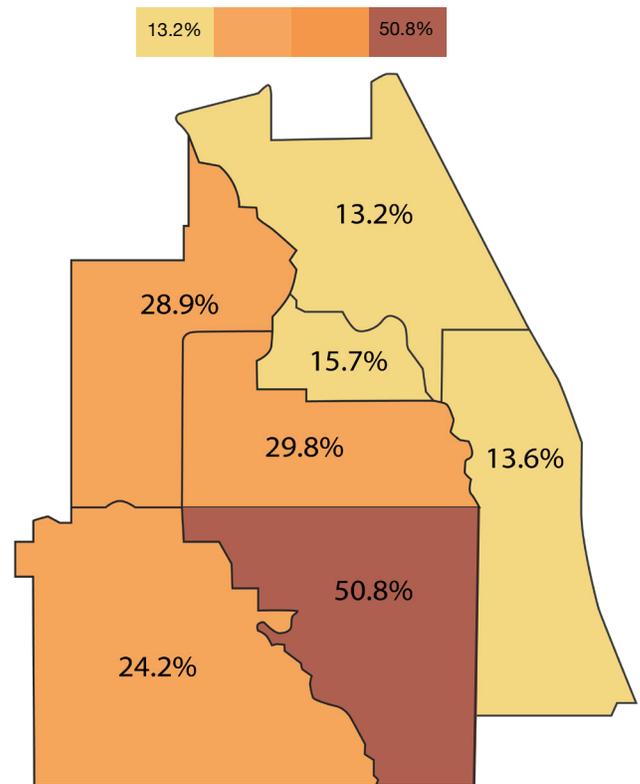


Figure 1

Source: University of Florida, Bureau of Economic and Business Research



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| POPULATION & DEMOGRAPHICS

Today's first graders will graduate into a world that is much more diverse in background and ethnicity than today's graduates experience.⁴ At the same time, they will be more likely to run into a senior citizen walking down the street than a senior in high school.

| GROWTH

For more than 75 years, Orlando's story has been growth. The addition of more than 1,000 people per week since before 1950 has made the area one of the fastest growing regions in the country for decades.⁵ Looking to the future, that trend is not expected to diminish. **Orlando is projected to add more than 1,500 people to the region every week for the next 11 years, eventually reaching a population of 5.2 million people.**⁶

This trend reflects population shifts happening across the country. According to Shonel Sen at the University of Virginia Demographics Research Group, "back in 2000, six of the top 10 largest states belonged to the North. By 2040, five of the top 10 are expected to be in the South."⁷ The center of the country's population is becoming increasingly more southern and western as strong in-migration (people moving from state to state within the United States) contributes to population growth in less expensive, warmer, southern states. According to population projections produced by American City Business Journals, Orlando is projected to be the second fastest growing large metropolitan

area in the United States moving toward 2030.⁸ Within this rapidly growing Orlando region, Osceola County will lead the pack with a population projected to increase by more than half the current level in the next 11 years (see fig. 1). Undoubtedly, this growth is from the already prominent Hispanic population living in Osceola County. More than 76 percent of the county's population growth over the next decade will come from the Hispanic community. The next fastest growing county in the region is Orange County, growing at 30 percent.

| AGE

The year 2030 and ensuing decade will finally bring about something that has been anticipated since the late 1960s: full retirement of the Baby Boomer generation. By 2030, one in every five Americans is projected to be 65 and older, and by 2035 there will be more seniors than children in the United States for the first time in history. Despite Orlando's lower than average median age, the region is no exception to this aging population. **Growth across all segments of Orlando's population means the region will hit this historic demographic milestone before the rest of the country.** Sometime between 2025 and 2030, the number of seniors in the region will surpass one million and outnumber those ages 0-17 (see fig. 2).⁹ This shift carries many implications in the areas of workforce supply, education, social services and mobility.

Seniors Will Outnumber Children For the First Time in History

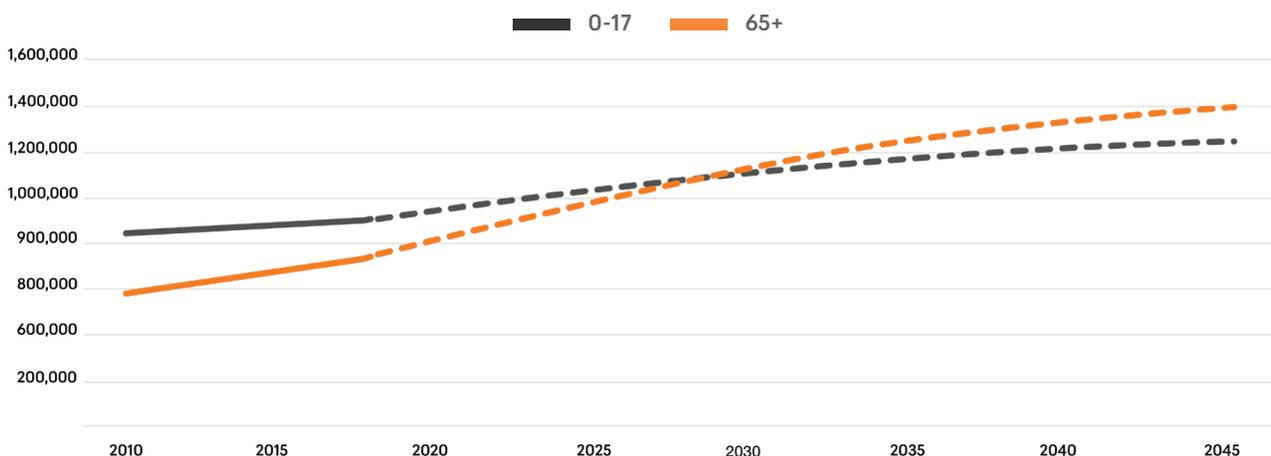


Figure 2

Source: University of Florida, Bureau of Economic and Business Research

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MIGRATION

Beginning in 2030, net international migration is expected to overtake natural increase (births minus deaths) as the main source of population growth in the United States. Even though immigration rates are expected to remain relatively flat, the high number of deaths from an aging population means international migration will contribute a larger share to U.S. population growth than natural increase.

Orlando is already well on its way to reaching that milestone. **One in every nine Orlando residents moved here since 2010, half of them from another country.**¹⁰ This strong in-migration growth will allow Orlando to lead the nation in racial and ethnic diversity growth in the coming years, meaning the class of 2030 will be surrounded by a community of diverse national and global cultures.

While other diverse metropolitan regions, such as Atlanta and Dallas, gained more than 40 percent of their population growth since 2010 from natural increase, only 12 percent of Orlando's population growth is from natural increase. More than half of Orlando's growth is from domestic in-migration and 32 percent is from international migration, compared to Atlanta's 22 percent and Dallas' 19 percent (see fig. 3).¹¹

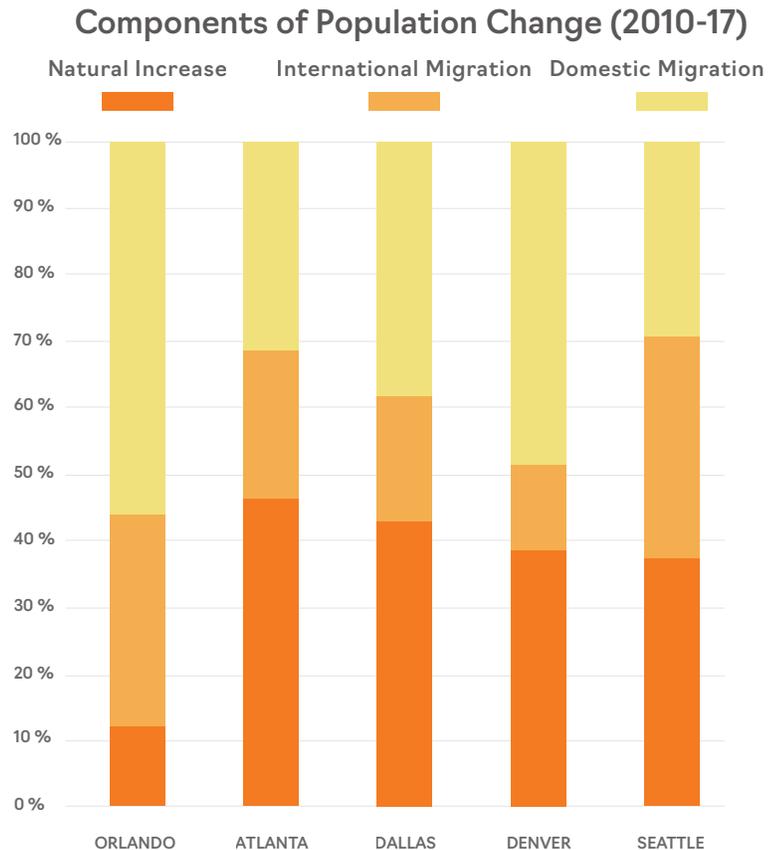


Figure 3

Source: United States Census Bureau, Estimates of the Components of the Resident Population



“The Orlando region is welcoming, open and hospitable – a great and fun place to live. People from all around the globe come to visit and many choose to stay, enriching the economic and tourism fiber of the region. A diverse community is a strong community, one that invites collaboration and delights in celebrating our individual achievements and our collective success.”

Yolanda Londoño
Chair
Orlando Economic Partnership



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| INDUSTRY & WORKFORCE

Demographic shifts and increased automation over the next decade will have huge implications for the industries and workforce of the future. **By the time today's first graders join the workforce in 2030, they may be working in industries that do not currently exist.** Additionally, the skills demanded of them may be entirely different than those expected of today's workforce.

| INDUSTRY

On average, industry employment should grow 19 percent in Orlando by 2030, a full 10 percentage points faster than the United States average.

The fastest growing industry in Orlando is expected to be **home and healthcare services** (64 percent increase in employment, see fig. 4). This is not exclusive to Orlando, as healthcare services will be the fastest growing industry across the United States. Specialty hospitals, family services and assisted living services are all industries that will expand by more than 40 percent employment in Orlando as the region and United States' population ages. Overall, more than 44,000 jobs will be created in healthcare and social assistance in the region.¹²

On the other hand, there are industries in Orlando that will grow in unique ways, compared to the top 30 MSAs in the nation.

For example, **manufacturing** jobs in Orlando will increase six percent, compared to the top 30 MSAs, which expect to see a four percent decrease.¹³ The region will also continue to significantly outpace the nation in **construction** jobs by about eight percent. Overall, Orlando's share of new industry growth will outpace national growth in legal services, computer systems design, air transportation, spectator sports and engineering services. These industries are projected to account for a larger share of Orlando's growth when compared to the nation and will provide a more abundant supply of local opportunities for the class of 2030 than they would find elsewhere in the nation (see table 1).¹⁴

The Partnership works to increase the presence of specific targeted industries that bring more high wage jobs to the region. The current average wage in Orlando is \$44,939, while the average wage for an advanced industry is \$86,071.¹⁵ Based on the estimated industry composition in 2030, the real annual average wage (in current dollars) will increase by \$22.38, not a significant wage increase by any means.

If the changes projected above hold true, the expected fluctuations in Orlando's industry breakdown alone will not be enough to raise real wages over the next decade. Nationally, the story is better, but not by much.

The industry average wage increases \$267.00, or \$5.13 a week, from the current average wage of \$55,490. That is significantly less than the previous decade (from Q3 2007 to Q3 2018), in which real wages increased nationally by \$19.00 per week.¹⁶





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| INDUSTRY

Industries Where Orlando's Growth Will Outpace the Rest of the Nation*

	CURRENT EMPLOYMENT	CHANGE	GROWTH LQ**
Elementary and Secondary Schools	81,831	19,558	18.29
Offices of Physicians	45,389	15,910	7.83
Amusement Parks and Arcades	69,476	14,969	11.44
General Medical and Surgical Hospitals	73,819	11,366	4.04
Services to Buildings and Dwellings	48,513	10,747	3.36
Traveler Accommodation	68,414	10,407	2.34
Business Support Services	27,465	10,192	1.03
Home Healthcare Services	14,819	9,461	3.86
Building Equipment Contractors	35,123	8,734	2.43
Employment Services	40,881	8,451	12.35
Computer Systems Design	19,766	6,806	15.14
Continuing Care Retirement Communities	11,112	5,478	1.22
Automobile Dealers	19,888	5,080	1.63
Colleges, Universities and Professional Schools	22,648	5,051	4.26
Architectural, Engineering and Related Services	21,185	4,680	1.73
Foundation, Structure and Building Exterior Contractors	22,057	4,661	11.00
Management of Companies and Enterprises	27,652	4,563	1.53
Warehousing and Storage	12,415	4,464	11.41
Religious Organizations	30,959	4,244	1.16
Agencies, Brokerages and Other Insurance Related Activities	17,686	4,165	2.00
Other Amusement and Recreation Industries	19,102	3,754	38.44
Residential Building Construction	16,561	3,632	5.64
Grocery Stores	38,183	3,462	3.35
Health and Personal Care Stores	17,514	3,209	10.78
Other Specialty Trade Contractors	14,746	3,167	2.79
Personal Care Services	13,942	3,077	58.52
Grocery and Related Product Merchant Wholesalers	10,616	2,320	17.02
Other Professional, Scientific and Technical Services	12,828	2,154	4.78
Legal Services	16,051	2,043	113.50
Accounting, Tax Preparation, Bookkeeping and Payroll Services	10,420	1,847	2.40
General Freight Trucking	10,236	1,556	10.75

Table 1

*Filtered for industries where current employment is at least 0.5% of total, regional employment.

** A location quotient (LQ) is a measure of concentration or specialty. Here the value is equal to the given industry's percentage of total growth in Orlando divided by the industry's percentage of total growth in the nation. LQs higher than 1.00 mean that Orlando is growing faster than the nation in that industry.

Source: JobsEQ 2018 Q2



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| INDUSTRY



“As BRIDG emerges as the epicenter for nanotechnology, photonics and smart sensor innovation, the increased access to technological markets, workforce development opportunities and high-quality jobs will be undeniable.”

Chester Kennedy
President & CEO
BRIDG

Fastest Growing Industries in Orlando* (2018-30)

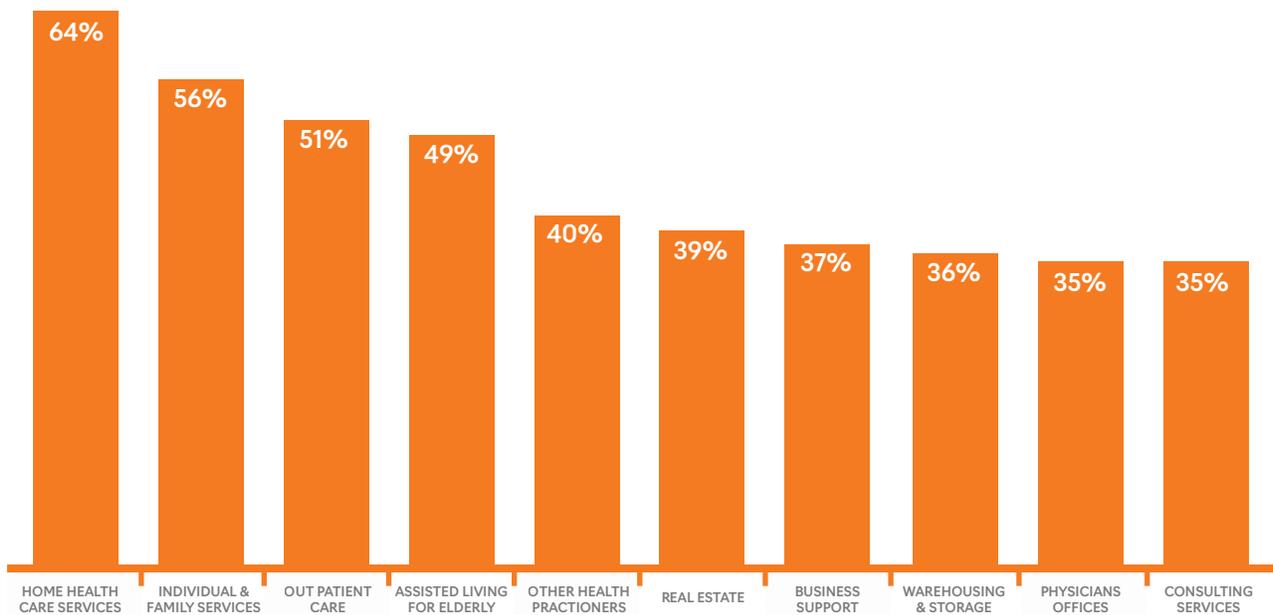


Figure 4

*Filtered for industries where current employment is at least 0.5% of total, regional employment.
Source: JobsEQ 2018 Q2

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| INDUSTRY

The Partnership's facilitation of job creation in targeted industries has a much wider reach than regional average wages alone. With an increasing population, matching growth with diverse industries and career opportunities will be more important than ever. **The presence of advanced companies focusing on smart sensors and autonomous vehicles could establish Orlando as an epicenter of transformational technology.** A key objective in the Partnership's mission to create a more resilient economy is fostering the entrepreneurial ecosystem and enhancing the talent pipeline.



Photo credit: Tom Atkinson

| WORKFORCE

By 2030, the economy is projected to create somewhere between 254,000 and 482,000 new jobs.^{17, 18} As the class of 2030 prepares for the jobs of the future, it is important to stop and consider how technology and automation will change the skills demanded of them. Management consulting and analytics firm McKinsey & Company predicted that up to 33 percent of America's workforce may need to switch occupations because of automation.¹⁹

Locally, four occupations combined make up more than 10 percent of projected occupation growth: fast food workers, retail salespeople, nurses and customer service representatives.²⁰ These same occupations (minus retail sales workers), along with software developers, are projected to increase in their share of Orlando's occupational composition by 2030. Occupations that show the greatest decrease in their share of the region's employment breakdown include cashiers, secretaries, office clerks, retail salespeople and bookkeepers (see fig. 6).

This does not mean that the number of employees in the five aforementioned roles will decrease. In fact, these positions will see an increase in the absolute number of employees as the workforce grows. However, based on projected growth rates and as job roles evolve with technology, these positions will make up a smaller percentage of Orlando's workforce than they do today.

Projected Employment Growth (2018-30)

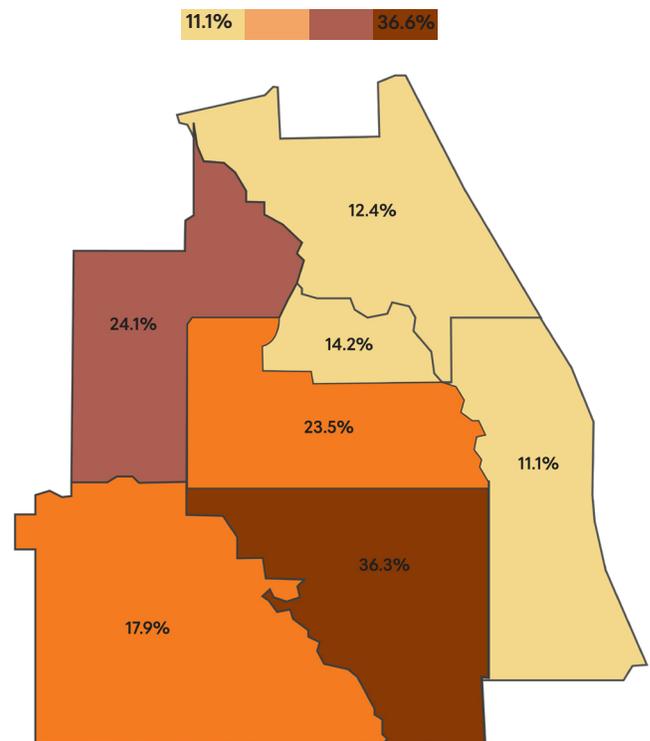


Figure 5

Source: JobsEQ 2018 Q3



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WORKFORCE

Technology has the power to create entirely new fields of work while also automating positions that are routine and predictable. Critical skills for the Orlando workforce moving into 2030 will need to be balanced, including both technological skills (which will see an increased demand of 55 percent by 2030) as well as social and emotional skills and the ability to adapt in the face of uncertainty.²¹

Continued partnerships between universities and local industry, such as Lockheed Martin's recent \$1.5 million gift to the University of Central Florida for the establishment of a new cyber innovation lab, will be critical to ensure that the regional talent pool is prepared with the technological skills that will be demanded in the future.



Change in Share of Orlando's Workforce (2018-30)

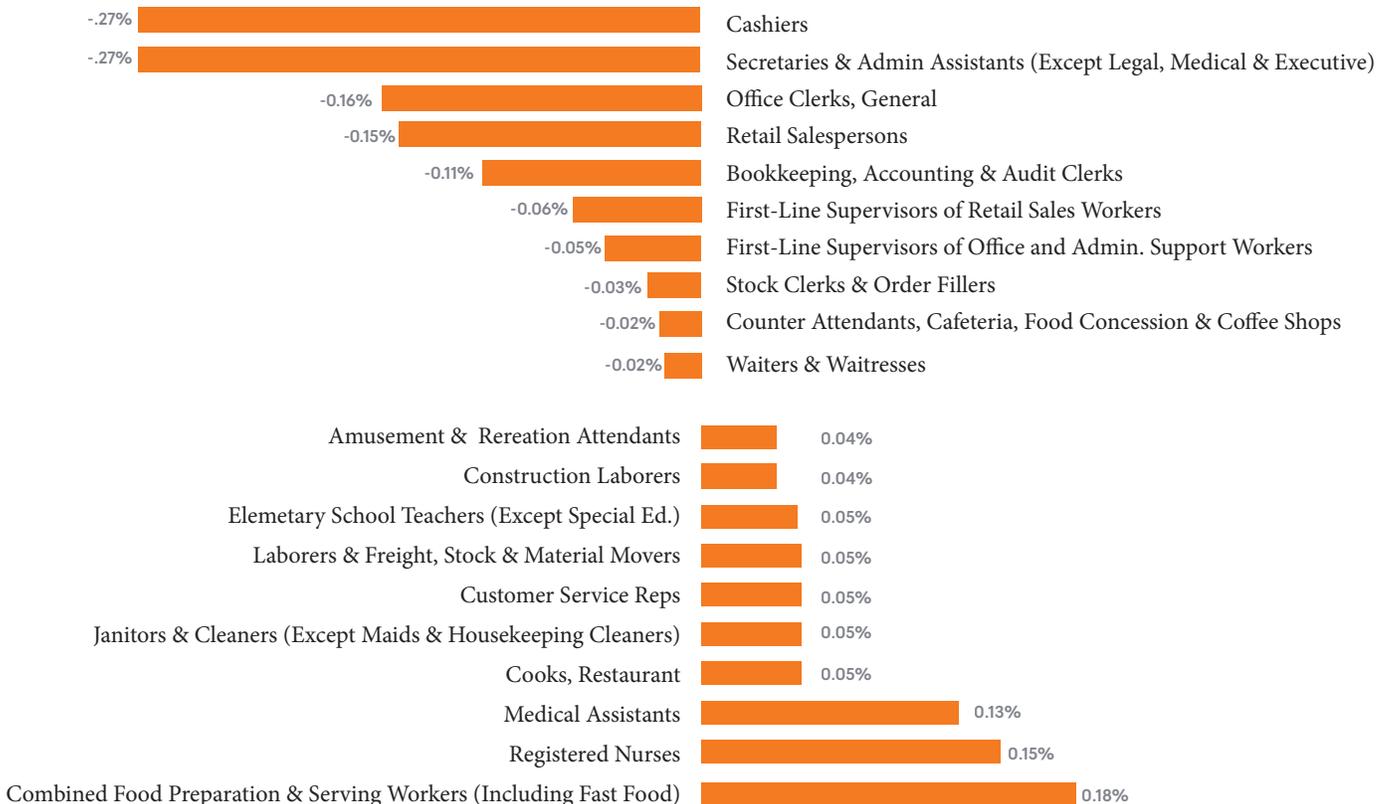


Figure 6

Source: JobsEQ 2018 Q3



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I INCLUSIVE GROWTH

A troubling trend often seen in fast-growing communities is a lack of inclusive growth, or growth across all levels of society.²² As Orlando continues to grow rapidly over the next decade, the high school class of 2030 will be graduating into a community that is very different from today in terms of educational opportunities, affordable housing and healthcare options.

I EDUCATION

Today's first graders will be moving through the primary and secondary education system as the region grapples with educator shortages.

Currently, there are 610,100 children enrolled in Orlando's seven school districts, with another 135,400 projected to be enrolled by 2030.²³

Orlando's growing population and the current retirement rates of K-12 school teachers will create an accumulated demand of more than 30,000 new teachers by 2030. At the current, projected occupational supply, there is a shortage of 1,100 teachers annually.²⁴

Another significant challenge this creates is the funding needed to build more schools to comply with Florida's state constitutional requirement of no more than 25 students per class.²⁵ As the high school class of 2030 prepares to enter the world of post-secondary education, the amount spent on tuition will be highly dependent on the state. Local public and independent higher education institutions rely on state financial support to keep tuition rates affordable for students. Florida's funding for public and independent higher education has seen a 51 percent increase over the last five years and a 14 percent increase over pre-recession levels. Out of all states, Florida had the highest year-over-year support increase in higher education funding between 2017-18 at 11 percent.²⁶

Accumulated Teacher Supply Gap

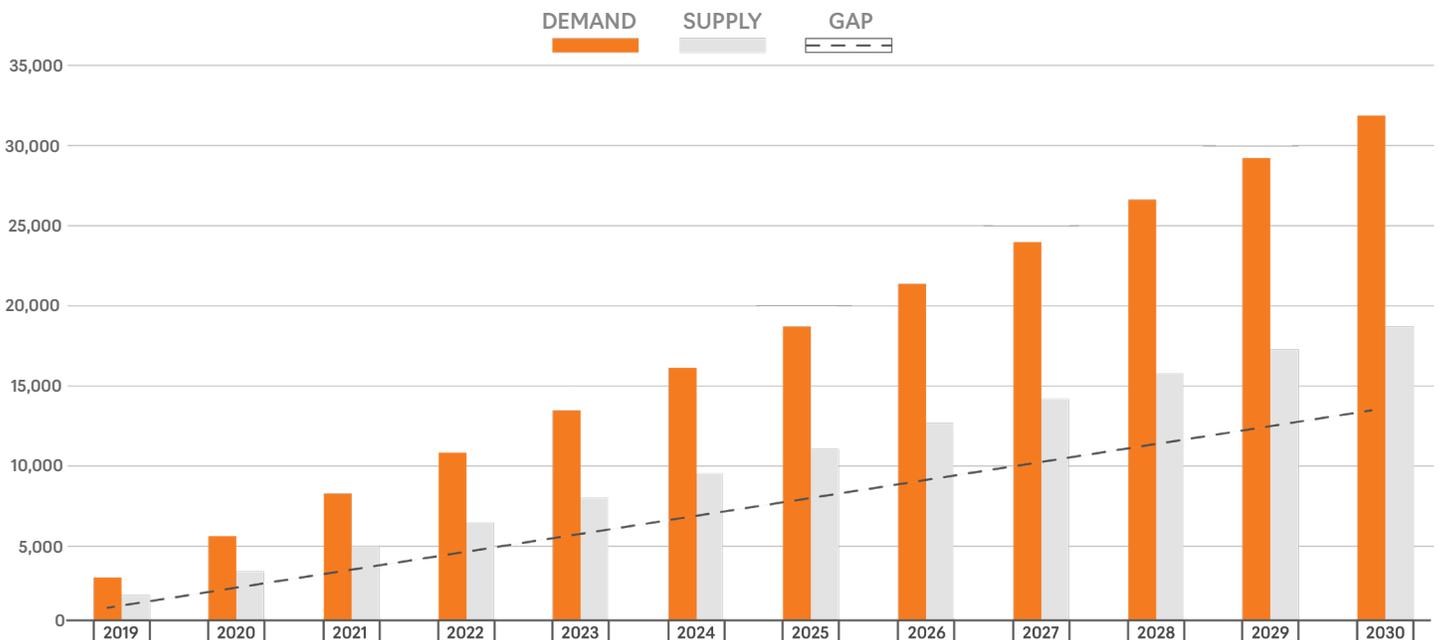


Figure 7

Source: JobsEQ 2018 Q3



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| EDUCATION

If this trend in funding continues, the regional workforce could expect to see more affordable higher education opportunities. The class of 2030 will also be able to take advantage of the opportunities associated with a fully actualized University of Central Florida/Valencia College Downtown Campus, including more immediate access to employers located in the Central Business District.

Strengthened by a collaborative network of community and state colleges, coupled with an increase in regional prioritization of technical and skilled labor institutions, the high school graduating class 2030 will have vastly expanded opportunities for continued education.

The average renter needs to work 51 hours per week to avoid becoming cost burdened (spending more than 30 percent of their income on housing).³¹

If housing costs continue to escalate as they have in the past few years, the graduates of the class of 2030 will have a difficult time finding affordable housing, especially if wage stagnation continues (see figure 9).

Given that infrastructure development is a slow-moving process, it is important to address the needs of affordable housing now.

| AFFORDABLE HOUSING

The Orlando region currently has a poverty rate of 16 percent with more than 651,000 people living in poverty.²⁷

Overall, the number of people living below the poverty line in the region could fill Camping World Stadium 10 times, almost one-third of them children. This number does not include individuals living above the poverty level that are asset limited and living from paycheck to paycheck.

The 2017 United Way A.L.I.C.E. report, which measures the population that is Asset Limited, Income Constrained, Employed, shows that the percentage of A.L.I.C.E. households increased in all seven of the Orlando region's surrounding counties from 2010 to 2015 (see fig. 8).^{28,29}

Often, low-income individuals and the disenfranchised get left behind in the wake of economic growth. A common culprit is the increasing cost of housing in neighborhoods that threatens to displace the neighborhood's original inhabitants. The most recent data shows that the fair market rate for a two-bedroom rental in the region is \$982 per month. This is 14 percent more expensive than the average renter can afford and 124 percent more expensive than a minimum wage earner (\$8.46/hour) can afford.³⁰

Growth in Percentage by A.L.I.C.E Households (2010-15)

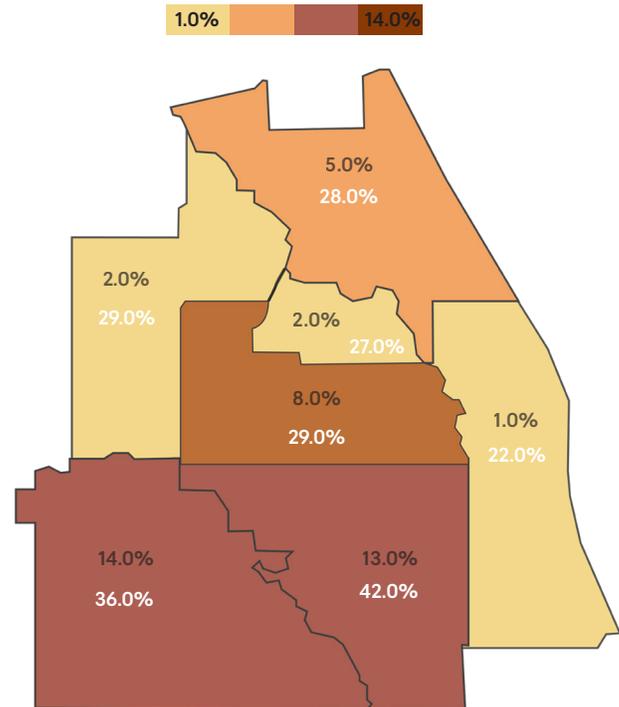


Figure 8

*White numbers correspond to the percentage of total A.L.I.C.E. households in each county. Source: United Way of Florida, A.L.I.C.E. Study of Financial Hardship, 2017 Update



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| AFFORDABLE HOUSING

A working solution for this type of problem is already underway in Orlando. To address the impact of increased development in the region's West Lakes community, just west of I-4 and Downtown Orlando, LIFT Orlando is driving a research-backed strategy that leverages holistic mixed-income housing to break the cycle of generational poverty. Mixed-use facilities that combine housing, office space and recreation, such as shopping and dining establishments, have been found to be a strong driver of inclusive growth. The project replicates a successful revitalization of an Atlanta community by Purpose Built Communities.

With success in the West Lakes community, expected results could be replicated in other high-need areas across Orlando. This is a strategy that paints a brighter picture for the Orlando of 2030 and its residents.



Rent vs. Wage Growth, Orlando MSA

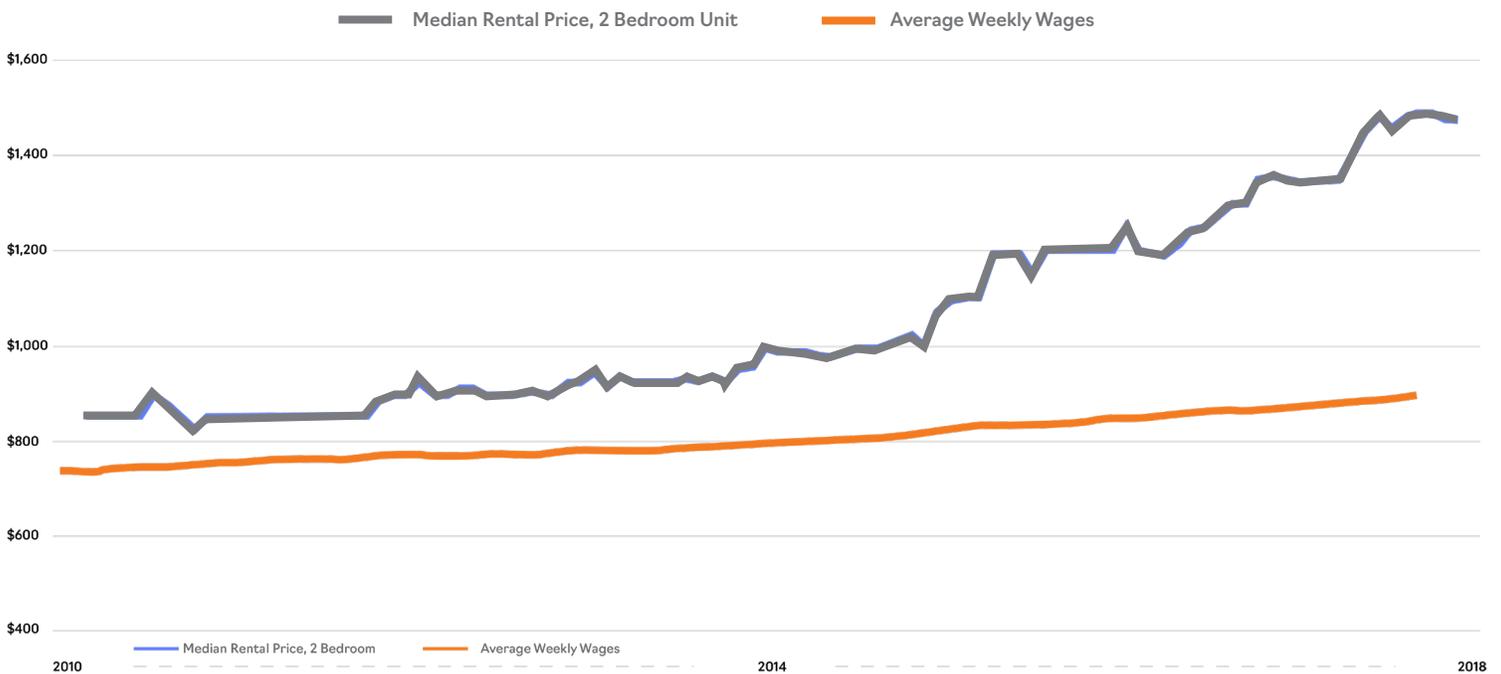


Figure 9

Sources: zillow.com/data & JobsEQ 2018 Q3



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| HEALTHCARE

Households, on average, spend 10 percent of their income on healthcare, including medical and insurance expenditures.³² An aging population means the need for health services and average household expenditure will be greater than ever in 2030. Meanwhile, the financial burden for both consumers and employers is expected to continue to grow faster than either income or employment, as has been the national trend for some time.

By 2030, consumers will be connected to their providers through both physical and digital mediums, ideally increasing access to healthcare for all segments of the population.

A critical component in Orlando's progress toward becoming an inclusive region will be investment in wellness. According to strategic foresight consultant Kedge, Orlando should "redefine wellness as a collective concept that makes health a driver of prosperity rather than an afterthought once an individual is sick."³³

"Healthcare is among the fastest-growing industries worldwide, and that's also true in Central Florida. Moving forward, that will mean job growth not just in traditional areas such as nursing, but in research, technology, simulation and other high-wage fields. As a major employer and the only national healthcare company headquartered in Florida, AdventHealth is working to transform our industry, connecting with our consumers and establishing lifelong relationships. We know that a proactive approach to our health, with a focus on wellness, improves quality of life and drives down the overall cost of care. We hope to play a central role in contributing both to Orlando's health and its economic prosperity as we move into the future."

Daryl Tol
President & CEO
AdventHealth's Central
Florida Division





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I INFRASTRUCTURE & TRANSPORTATION

The year 2030 will bring with it many transportation improvements and technologies that have yet to be developed, building on what exists today. Currently, Orlando ranks as the 26 worst city for traffic out of the 297 United States Cities included in the most recent INRIX Global Traffic Scorecard, a study analyzing the impacts of traffic and congestion across five continents.³⁴ On the other hand, Orlando can tout that more than \$10 billion is currently invested in transportation infrastructure, far outpacing that of regions like Chicago (ranked 22), Washington D.C. (18) and New York City (3), that grapple with crumbling infrastructure. These battling forces will influence how the class of 2030 and the rest of Orlando's growing population move about the region.

“Our vision is to expand our transportation solutions by enhancing options for all of our residents, reducing congestion that impedes our growth, leveraging technology and collectively supporting initiatives that propel our progress. The need for collaboration and cooperation will only intensify as we consider the future.”

Tracey Stockwell
Chief Financial Officer
Universal Orlando Resort



PROJECTS COMING ONLINE BY 2020

1 The Florida Department of Transportation estimates that daily traffic on I-4 will range between 232,700 to 248,500 vehicles traveling the portion of road between Ivanhoe Boulevard and Princeton Street in 2030, an increase of 45-55 percent from today.^{35, 36} **I-4 Ultimate** is scheduled to be complete in 2021. The project will not add lanes to the 21-mile stretch of road; instead it will improve interchanges, add bridges and introduce dynamic tolling, giving travelers an option: sit in congestion or pay tolls for an expedited lane.

2 **SunRail**, the region's commuter rail system, has an ambiguous future looking into 2030. The 17.2-mile southern expansion which connected Sand Lake Road to Poinciana was completed in July of 2018 using DOT funds, but the need for extended evening and weekend service is a major point for the community. Funding sources for proposed extensions, such as a connection to Orlando International Airport (OIA) and the northern extension into Deland are uncertain. Funding for SunRail's operations and maintenance is intended to shift from State sources to local governments in 2021, but negotiations are underway.

3 **Virgin Trains USA** (formerly Brightline), Florida's higher-speed passenger rail system, began operations in 2018 running between Miami and West Palm Beach and has secured permits for the much-anticipated expansion North to the new Orlando International Airport terminal by 2022. An Orlando to Tampa expansion has also been proposed and would be the following phase for the private rail company. This mega metro of Orlando and Tampa will be able to leverage all the strengths of 117 higher education institutions, expanded legislative impact and a population that would currently make it the sixth largest metro in the nation.³⁷

4 By 2030, the new **South Terminal at Orlando International Airport (MCO)** will be nearly 10 years old as MCO pursues a 25-year plan to expand and keep pace with increased air travel demand. Air traffic at MCO is expected to surpass 60 million annual passengers in 2030 thanks to increased domestic and international travel. As one of the busiest airports in the United States and one of the least expensive, MCO will continue to be a major draw to the region, not only for tourists but for business travelers and future Central Florida residents.³⁸



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| INFRASTRUCTURE & TRANSPORTATION

In addition to these large projects, much of the beltway around Orlando will be completed, but expansions and maintenance will always be a work in progress. New CFX routes to Brevard County will be identified and support the growing population moving eastward. Expansions at Orlando Sanford International Airport, Port Canaveral and the Space Coast are on-going to handle growing demand. Combined, the transportation connections in all directions from the core of Orlando will need to accommodate the rapid growth of the region.

| TRANSPORTATION & TECHNOLOGY

Other industries that are projected to grow rapidly in Orlando include ground passenger transportation (50 percent increase) and taxi and limousine services (46 percent increase), most likely fueled by an increase in rideshare services such as Uber and Lyft.³⁹ Rideshare services and increased public transportation options also have the potential to empower the ability of people across neighborhood boundaries and socioeconomic classes, ensuring that everyone in Orlando has access to transportation. This highlights the importance of investing in regional transportation systems and infrastructure, as Orlando adds more than 1,500 people a week to the population over the next 11 years.

One of the most relevant technological trends in this region will be autonomous vehicles (AV). Not only will autonomous technology be utilized by residents, it will also be developed and manufactured here. Orlando is presently one of only 10 regions in the country to be designated an AV Proving Ground by the U.S. Department of Transportation and is at the forefront of LiDAR, a light and sensor mapping technology critical for AV. Innovative local companies like Luminar Technologies are making advances in research and development for these products. Orlando is also home to SunTrax, a 400-acre Advanced Mobility Institute for the

development and testing of related technologies, located at Florida Polytechnic University. **By 2030, autonomous vehicles may be ubiquitous technology – having been developed and tested in the region.** The Partnership will continue to work to enhance Orlando's competitiveness in this and other initiatives by not only demonstrating their viability to audiences in and out-of-market, but also supporting the underlying community and financial support network for these businesses to thrive.



As early as 2021 the region will see the completion of a project supported by an \$11.9 million grant from the Advanced Transportation and Congestion Management Technologies Deployment (ATCMTD) program. Full deployment over the ensuing years will leverage a “SmartCommunity Mobility on Demand” framework utilizing rideshare products to provide low income and underserved populations better access to: employment centers, education and medical facilities and grocery stores through coordinated trips and automated shuttles.

The program will feature sensors and new traffic technology that quickly adapts to real time traffic conditions, reducing congestion and increasing the consistency and predictability of travel. Lastly, the program will reduce pedestrian and bicycle accidents through PedSafe, a Connected Vehicle technology system.⁴⁰



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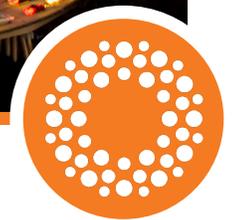
| FINAL THOUGHTS

The years leading up to 2030 will be transformative for Orlando. Workplace productivity, adaptability of social infrastructure and the capacity of traditional infrastructure will be tested as the region continues to grow at a rapid pace.

This report set out to provoke thought about where Orlando is headed and what trends will be most significant for the region. Will there be unpredictable events that change this trajectory? Absolutely. Yet the approximations and projections laid out in this report should be an asset for leaders making deliberate, thoughtful decisions about the region's future.

This can help ensure that by 2030, Orlando has a workforce prepared to adapt to new technologies, the resource capacity to meet the needs of a growing population and connected transportation systems that works for everyone.

The Foundation for Orlando's Future, as part of the Orlando Economic Partnership, is committed to supporting that effort. In 2019 alone, expect to see more resources that empower community leaders like the implementation of a regional scorecard to give insight into the region's progress across a variety of economic trends, increased strategic foresight to empower and educate regional leaders and expanded use of collective leadership through the launch of Leadership Orlando 2.0: The IMPACT Project.



“The Orlando Economic Partnership is focused on key objectives that strengthen Orlando’s economy, amplify Orlando’s story, champion regional priorities, empower our leaders and build a brilliant region that elevates our region’s competitiveness. Our ultimate goal is to advance broad-based prosperity and the Partnership, with the engagement of our business community, plays a critical role in shaping how we get there.”

Tim Giuliani
President & CEO
Orlando Economic Partnership

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About the Orlando Economic Partnership

The Orlando Economic Partnership is a public-private, not-for-profit economic and community development organization. The Partnership represents seven counties in Central Florida, including the City of Orlando, and hundreds of the region's top private businesses.

Through the power of our partnerships, we strengthen our regional assets and businesses, advocate for regional priorities and write the next chapter of Orlando's story. We are injecting fresh resources and perspectives while harnessing the strength of the region's culture of collaboration and innovation to create a new future for our diverse and growing population.

About the Foundation for Orlando's Future

The Foundation for Orlando's Future provides analytical insight, strategic foresight and leadership development to inform and drive the region's pursuit of quality job creation, economic growth and broad-based prosperity by educating and empowering community leaders. New Foundation initiatives slated for 2019 include the inaugural release of the Prosperity Scorecard and the introduction of Leadership Orlando 2.0: The IMPACT Project.

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Thank You to Our Champions of Broad-Based Prosperity*



*The content and information in this report does not necessary reflect the opinion or position of the Champions for Broad-Based Prosperity

