

ORLANDO BRANDING PERCEPTION STUDY

Have we moved the needle?



METHODOLOGY

- Study is an update of a survey conducted in June 2015.
- Online survey was in March 2018 to measure changes in perceptions.
 - Location Advisors/Site Selection Consultants (Site Selectors)
 - Out-of-State Corporate Executives (Corporate)

122

Responses

54 Site Selectors

83 Corporate Executives

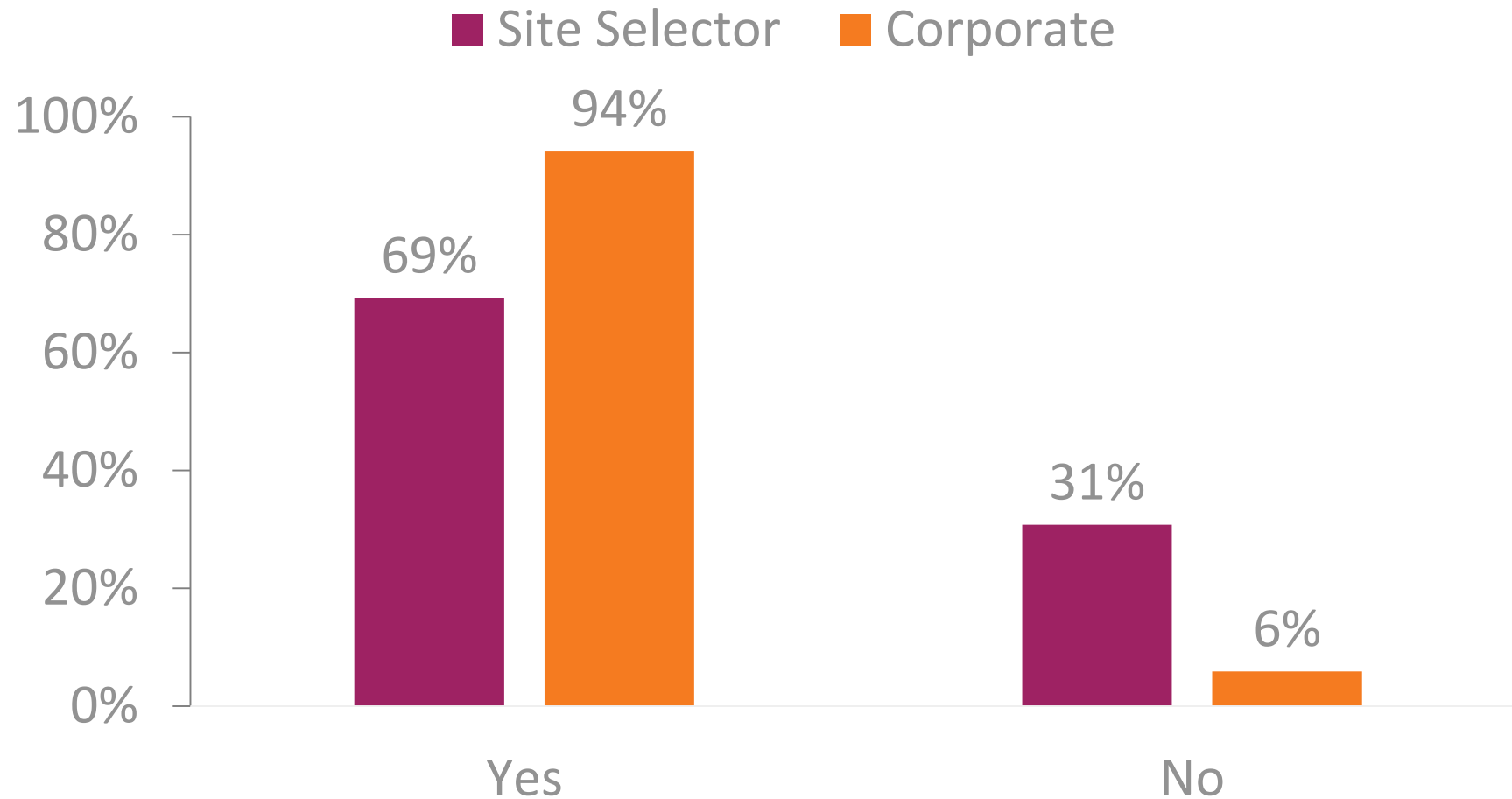


FAMILIARITY WITH “ORLANDO. YOU DON’T KNOW THE HALF OF IT.” REGIONAL BRANDING CAMPAIGN

- 76% of Site Selectors report having heard the brand campaign “Orlando. You Don’t Know the Half of It.” versus 29% in 2015.
- 59% of Corporate Executives report having heard the brand campaign versus 2% in 2015.

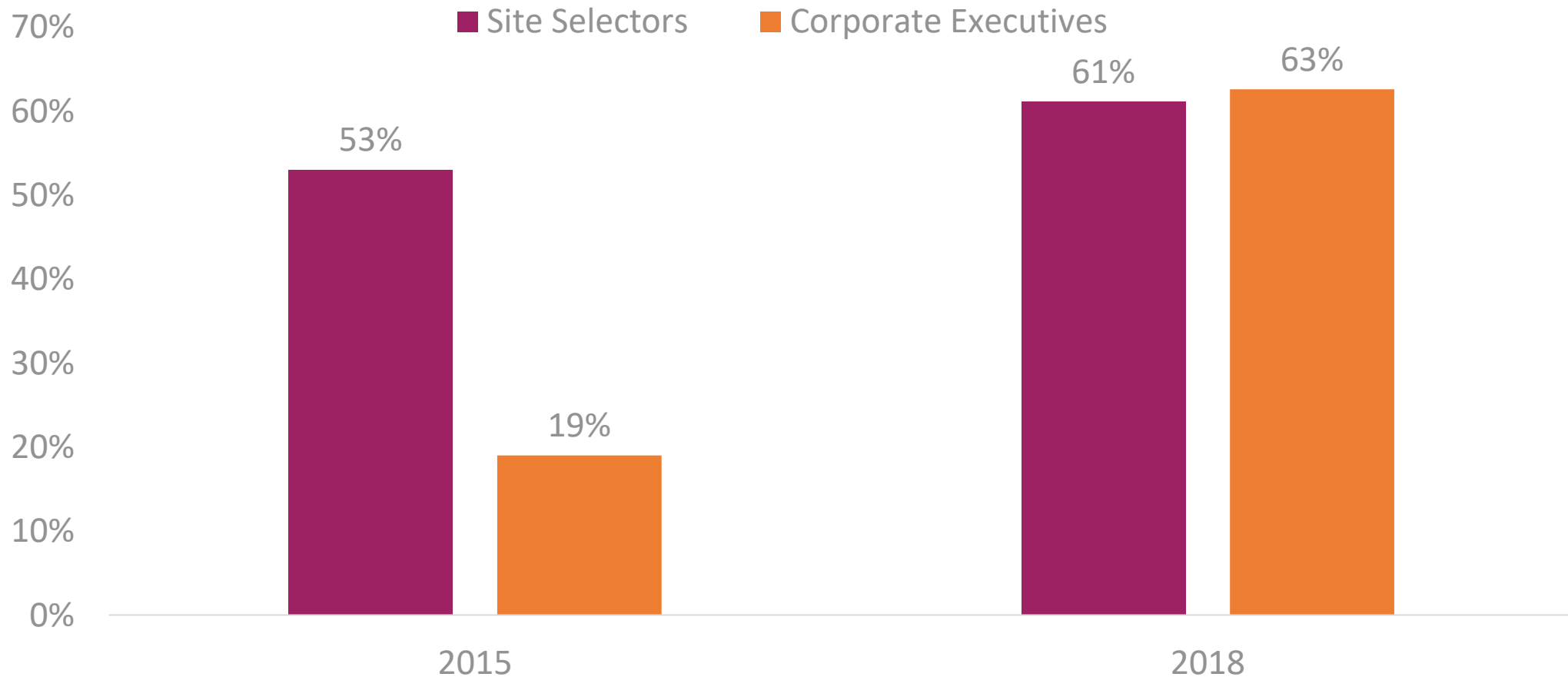


DOES THE NEW BRANDING CAMPAIGN INSPIRE YOU TO LEARN MORE ABOUT ORLANDO'S BUSINESS CLIMATE?



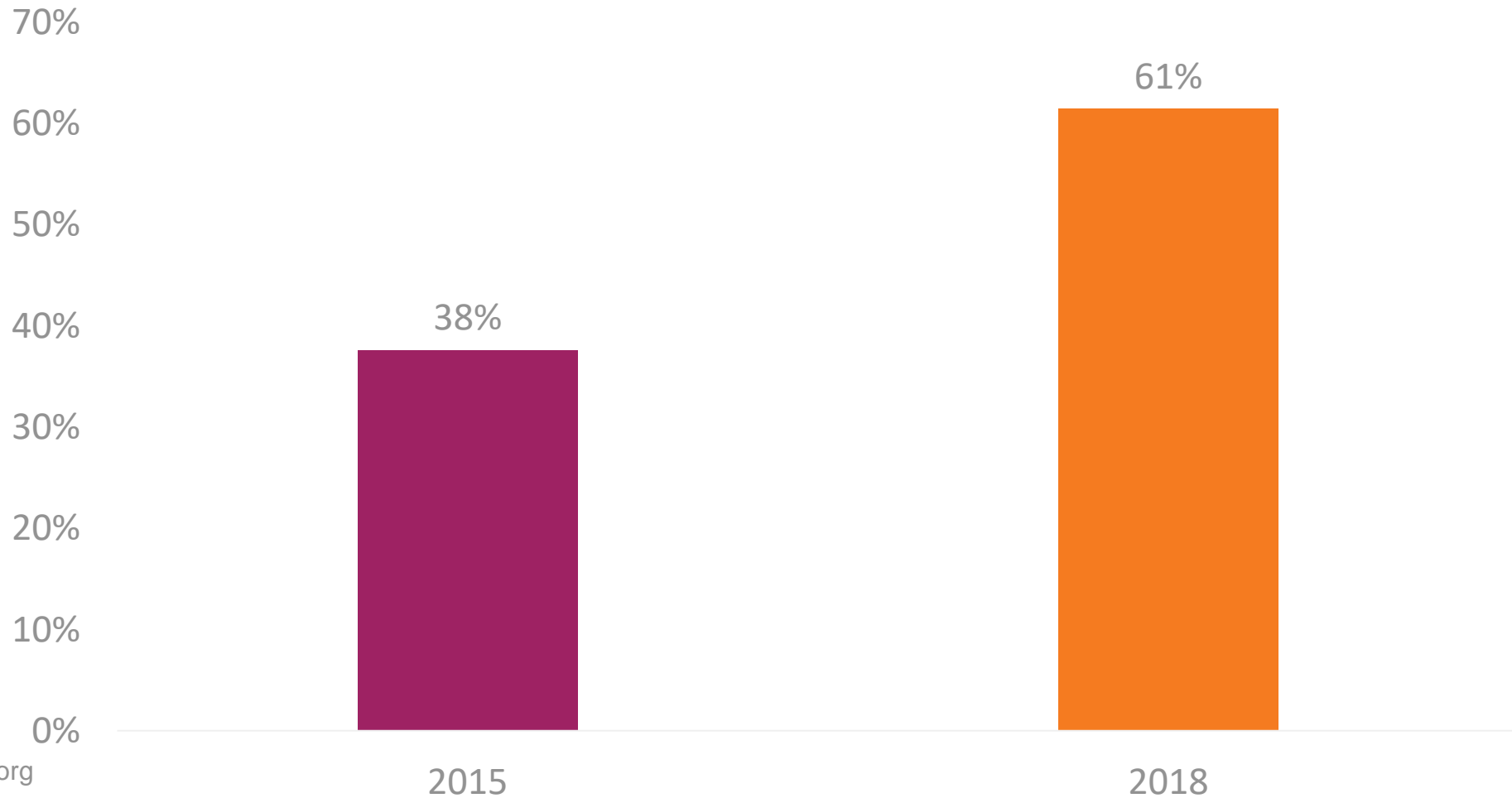
LIKELIHOOD OF CONSIDERING ORLANDO FOR FUTURE PROJECT 2015 VS. 2018

(% “likely” or “highly likely”)



PERCENTAGE OF ALL RESPONDENT “LIKELY” OR “HIGHLY LIKELY” TO CONSIDER ORLANDO FOR A FUTURE PROJECT

2015 vs. 2018



STRENGTHS OF ORLANDO

Corporate Executives Top Strengths	Site Selectors Top Strengths
1. Weather – 52%	1. Airport – 45%
2. Tourism – 18%	2. Workforce – 43%
3. Population growth – 16%	3. Tax structure – 24%
4. Location – 13%	4. Weather – 20%
5. Tax structure – 13%	5. Low cost – 20%

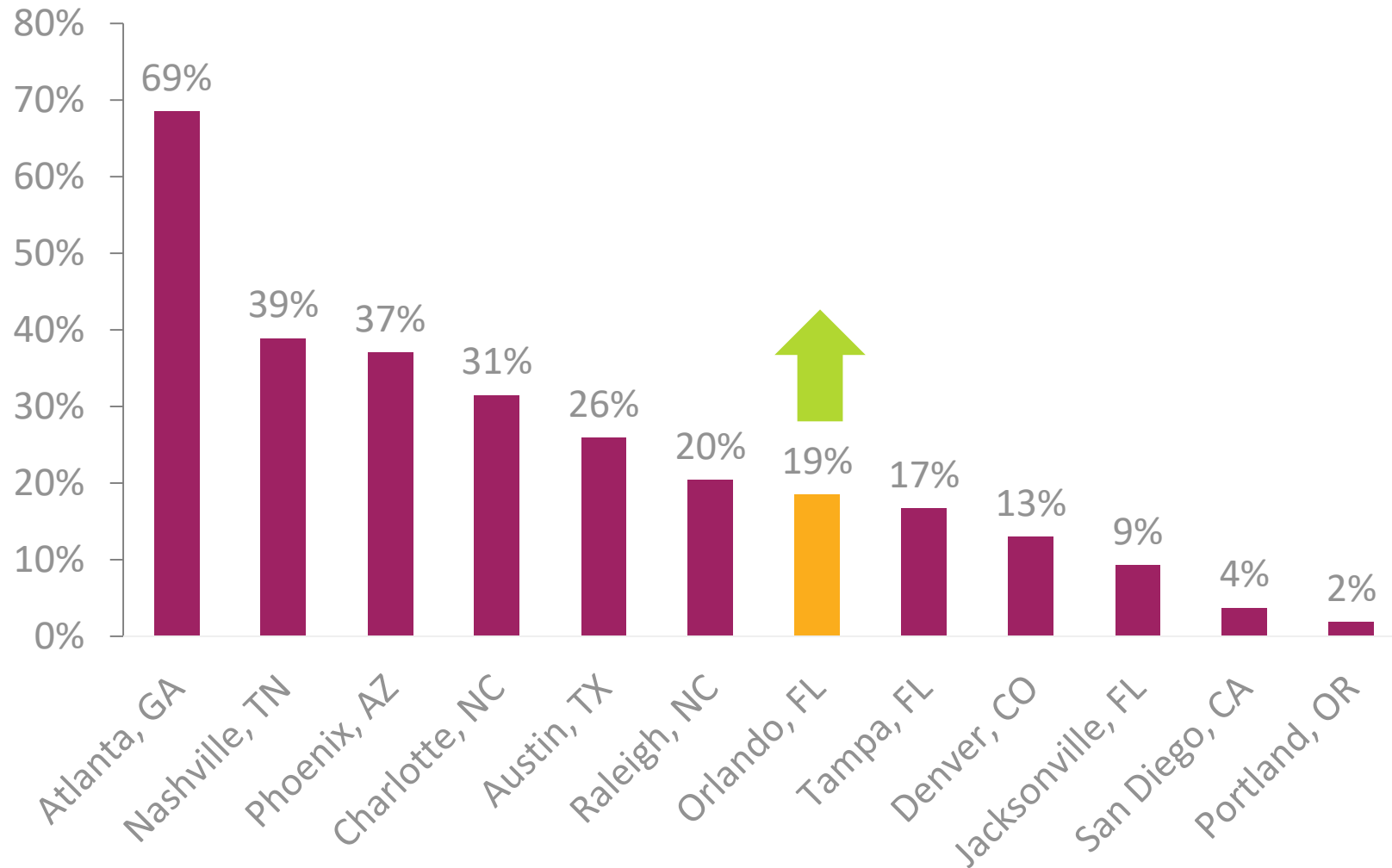


WEAKNESSES OF ORLANDO

Corporate Executives Top Weaknesses	Site Selectors Top Weaknesses
1. Weather (Storms) – 34%	1. Tourism perception – 36%
2. Tourism perception – 24%	2. Incentives – 24%
3. None – 17%	3. Workforce – 24%
4. Workforce – 15%	4. Traffic – 22%
5. Cost of living – 14%	5. Distance to other major markets – 18%



SELECT CITIES MOST CONSIDERED FOR FUTURE PROJECTS – SITE SELECTORS



KEY LEARNINGS

The Partnership Has Moved the Needle...

- All of the following indicators showed an increase in 2018 vs. 2015:
 - The level of familiarity with the brand campaign “Orlando. You Don’t Know the Half of It.”
 - How well the region was marketing itself for investment.
 - The perception of the region’s overall business climate.
 - The likelihood of considering the Orlando region for future investment projects.



KEY LEARNINGS

However, Some Challenges Still Exist...

- Tourism and Hospitality & Entertainment Industries were the most associated with Orlando for both groups.
- Both groups relatively unfamiliar with major companies located in Orlando region.
- Orlando faces stiff competition from other locations that are perceived to have stronger business climates.

