



Looking Back

What's Next



Moving Forward

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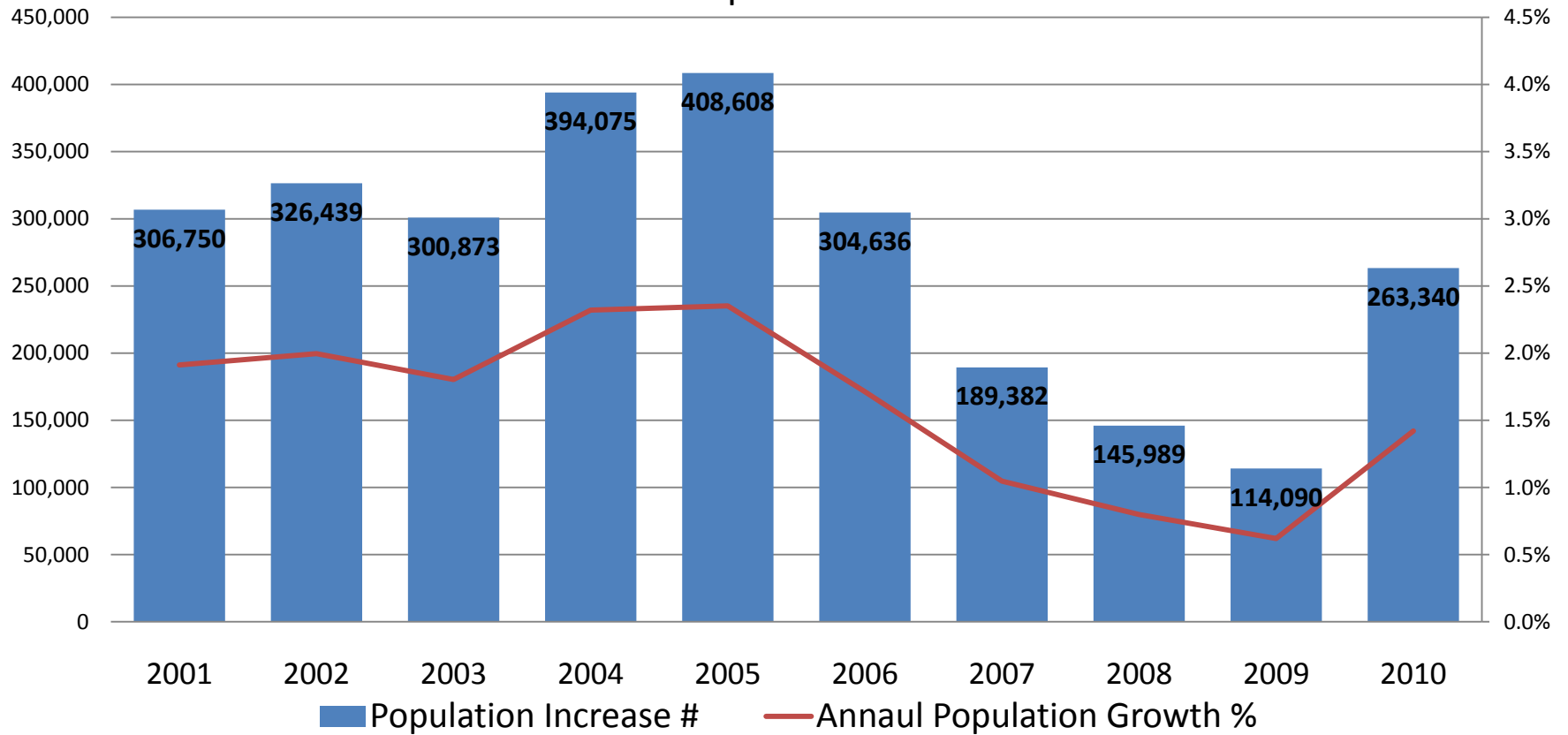
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Population Trends

Florida Population Growth



Source: US Census, Population Estimates, Census 2010

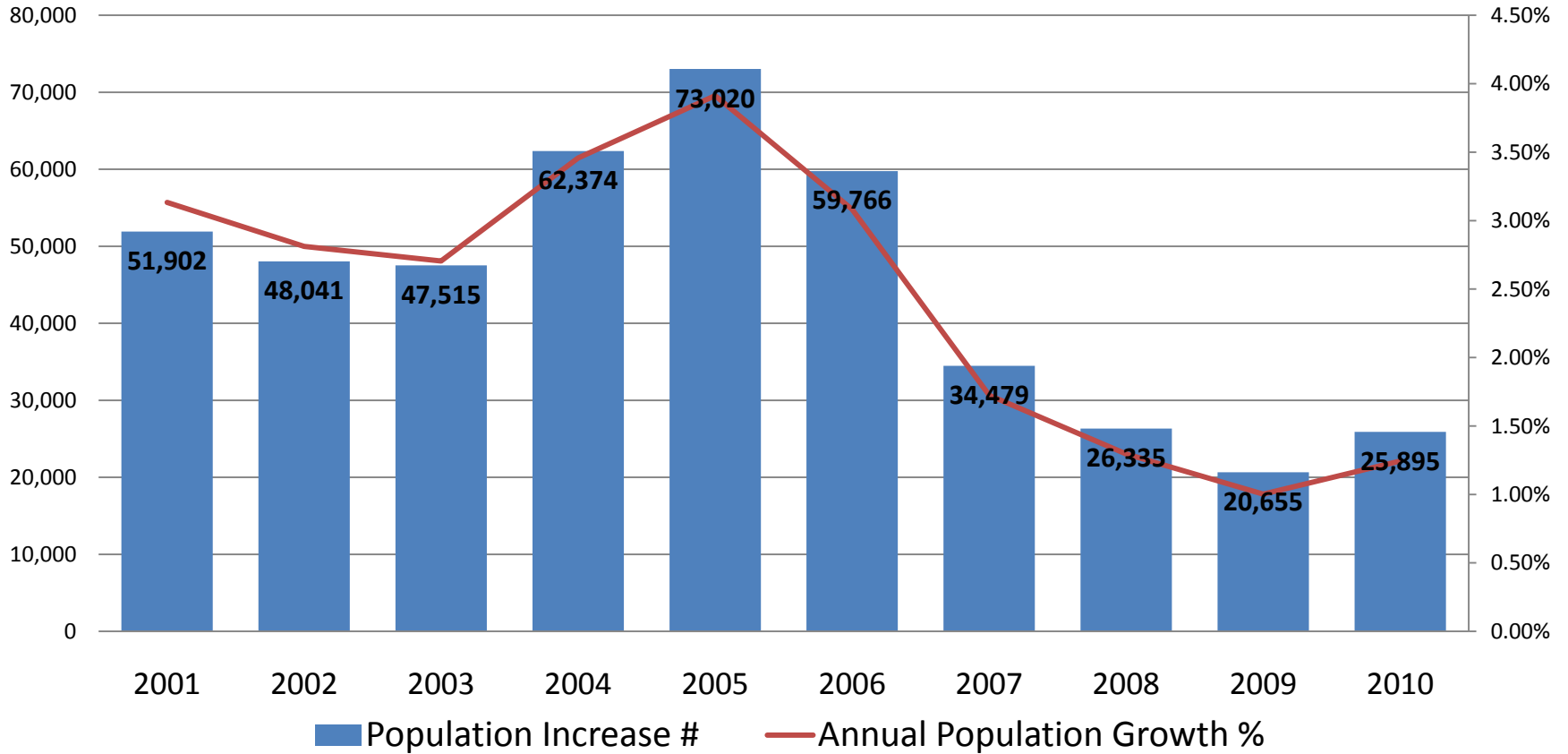
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Population Trends

Metro Orlando Population Growth



Source: US Census, Population Estimates, Census 2010

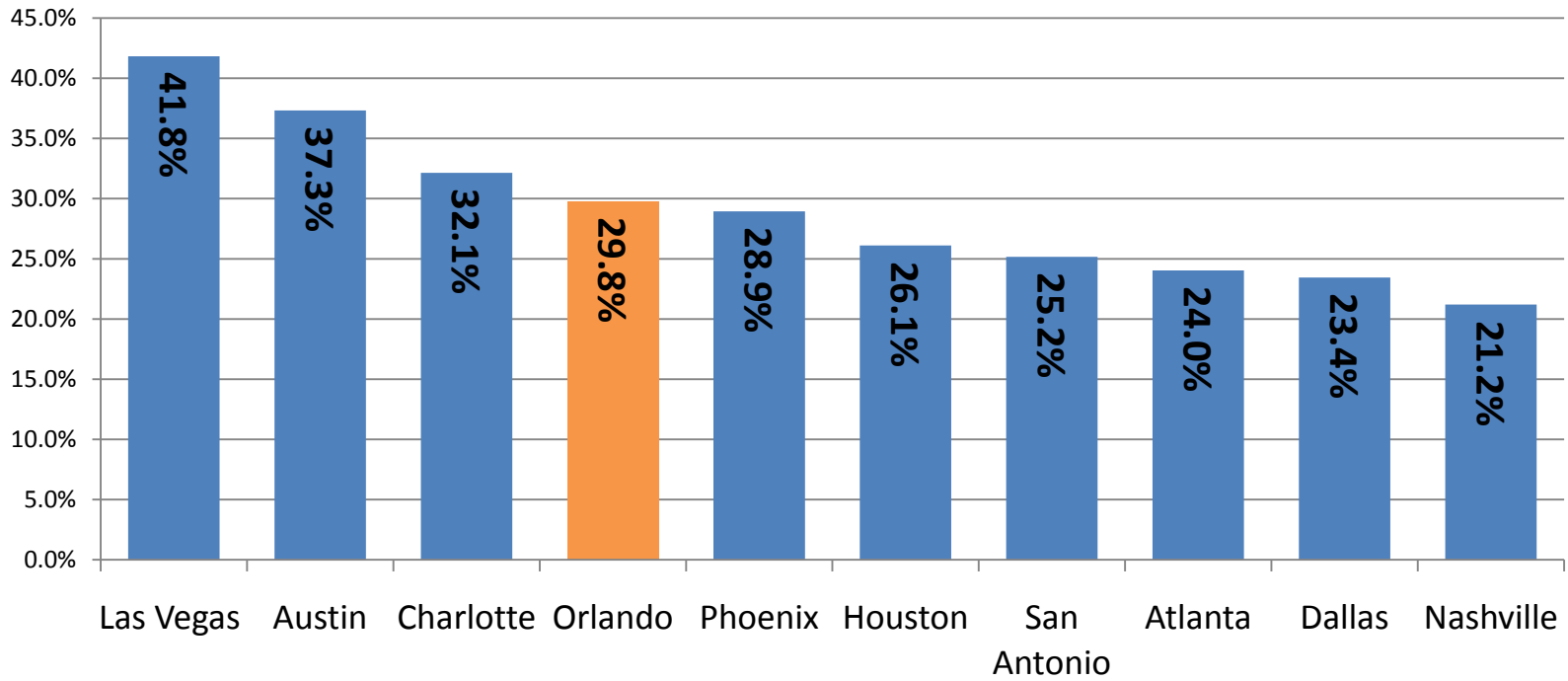
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Population Trends

Fastest Growing Major Metros
Population Growth % 2000 - 2010



*Metros with population greater than one million
Source: US Census, Population Estimates, Census 2010*

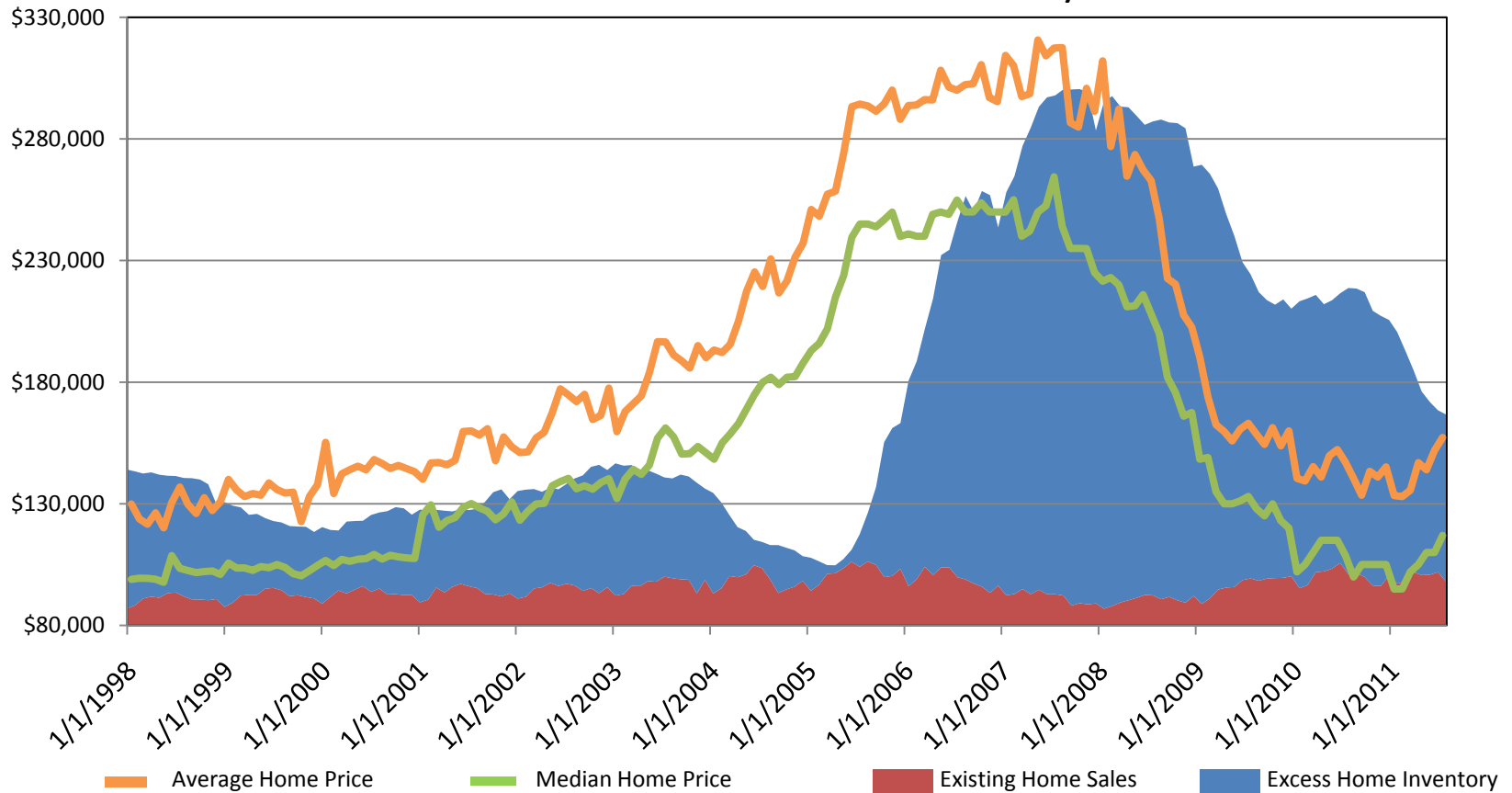
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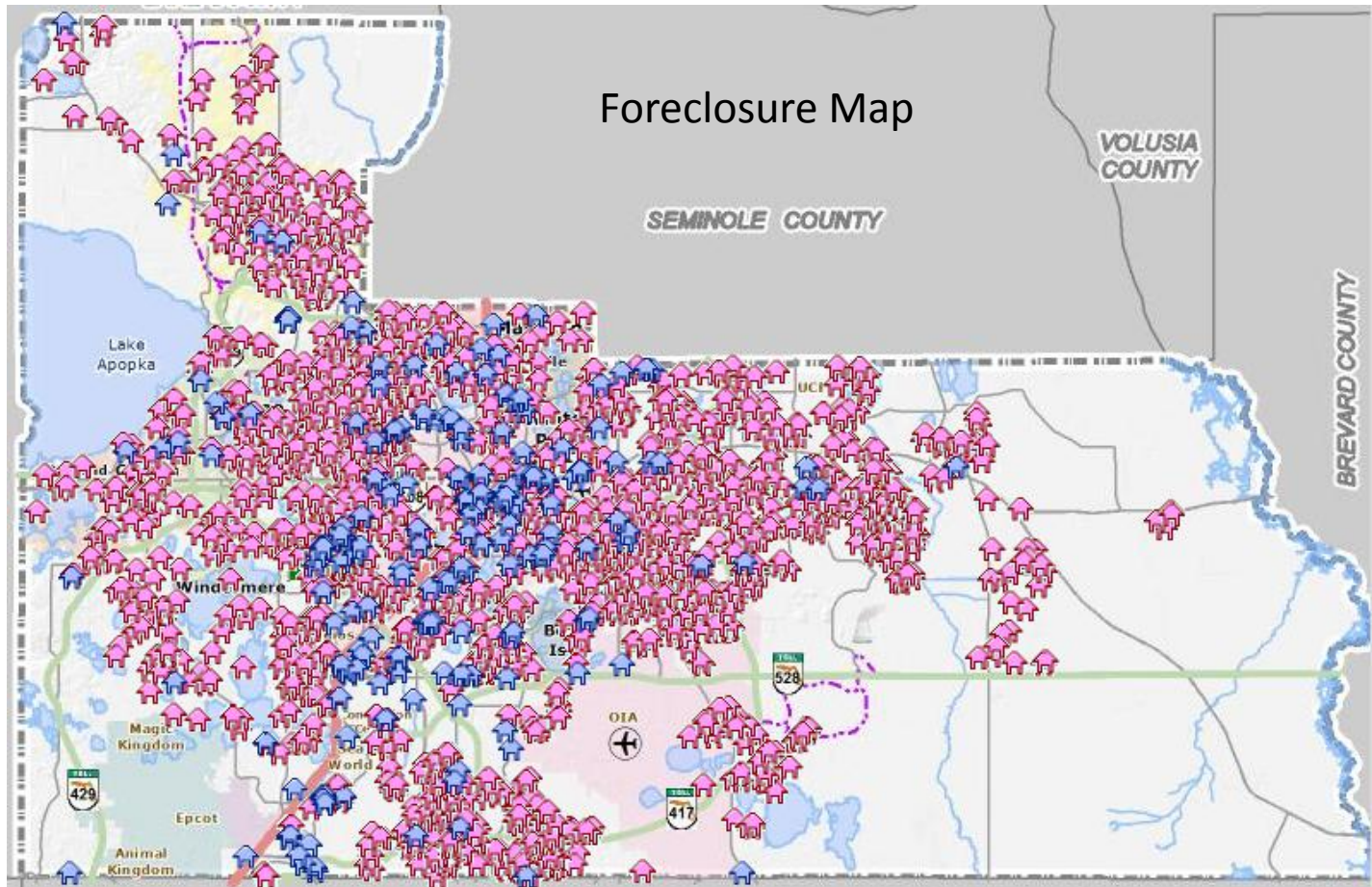
Housing Trends

Metro Orlando Home Prices vs. Inventory



Source: Orlando Regional Realtors Association

Housing Trends



Source: Orange County Property Appraiser

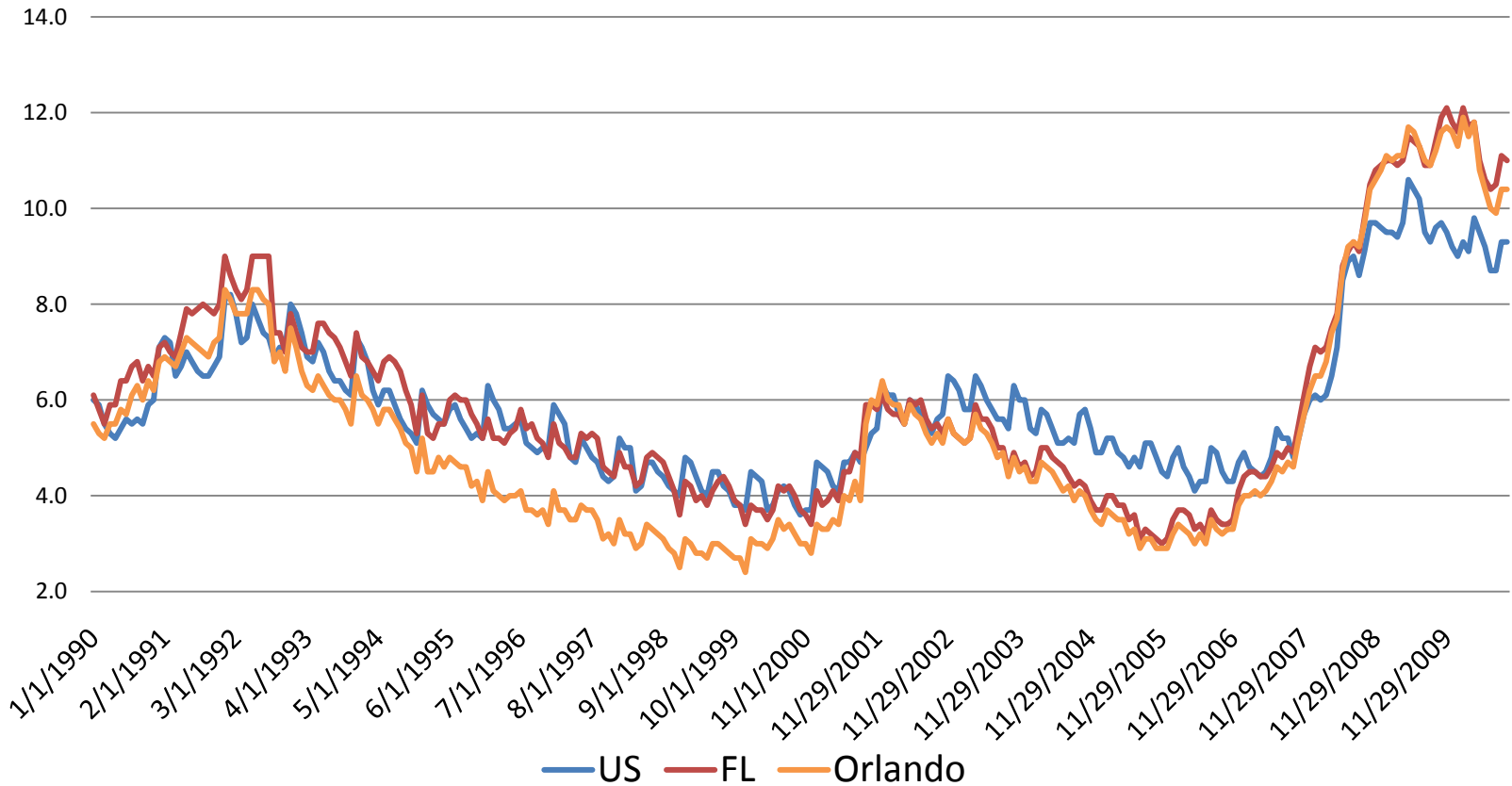
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Unemployment Trends

Unemployment Rate



Source: BLS, LAUS (Household Survey)

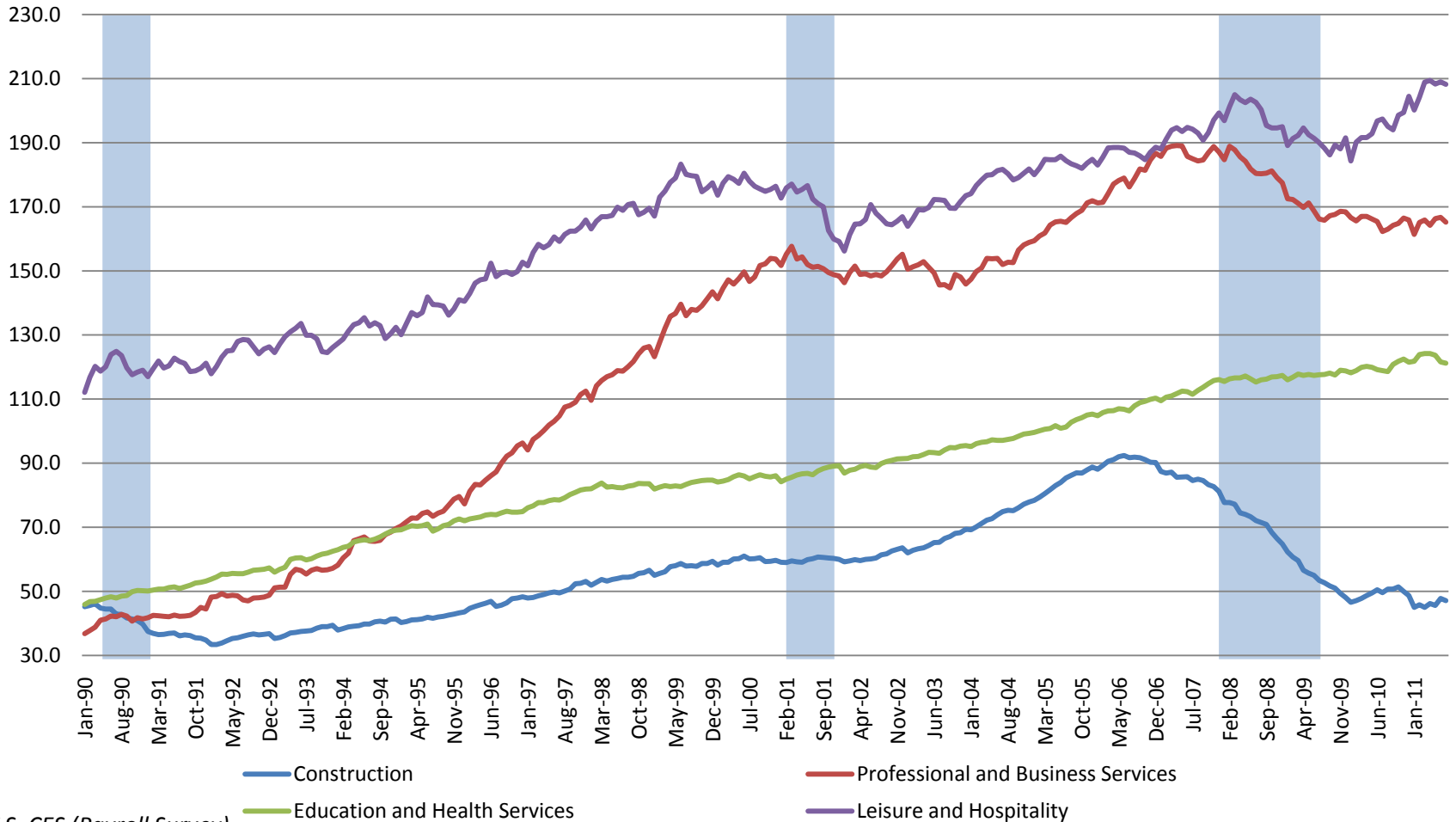
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Employment Trends

Metro Orlando Employment by Industry



Source: BLS, CES (Payroll Survey)

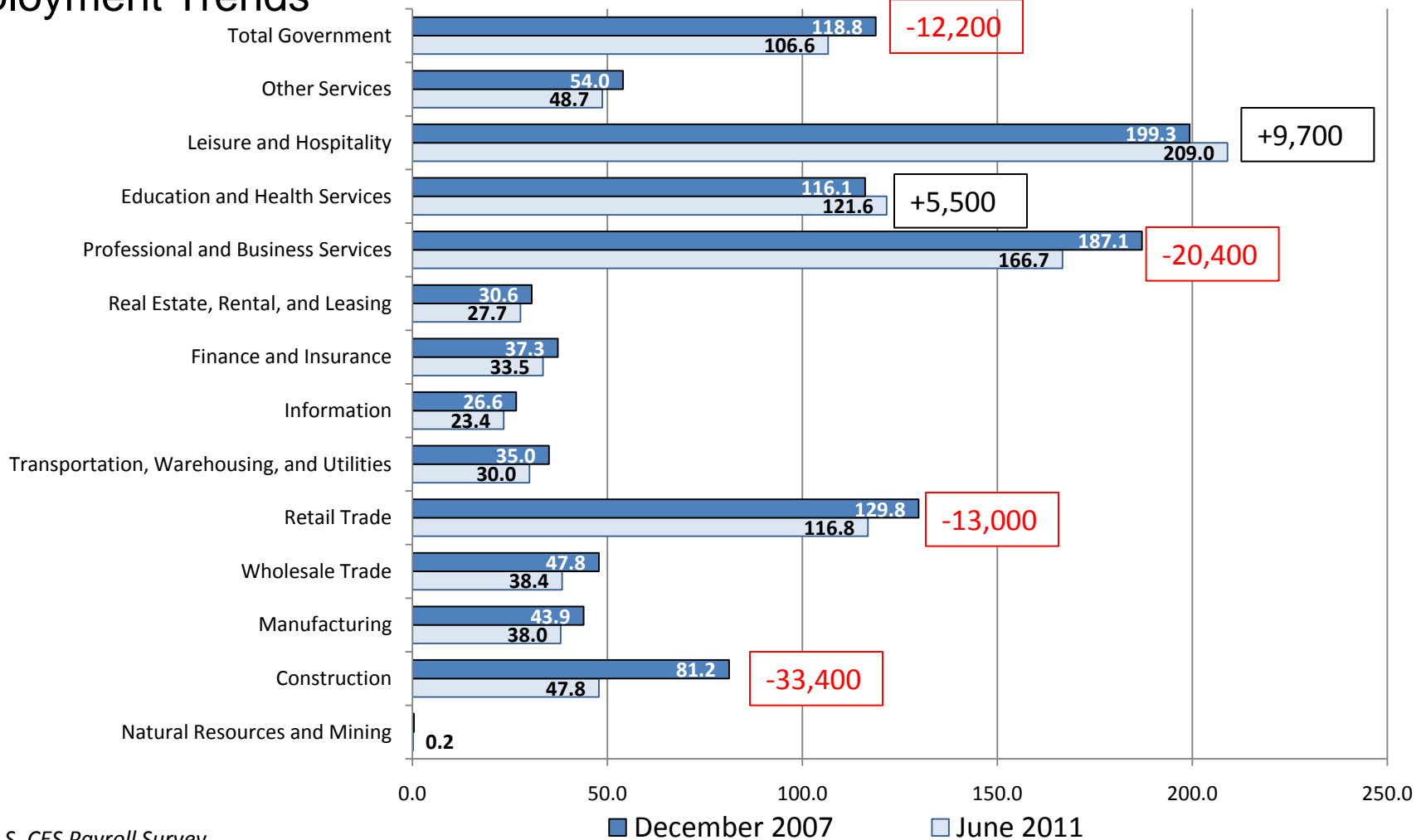
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Employment Trends

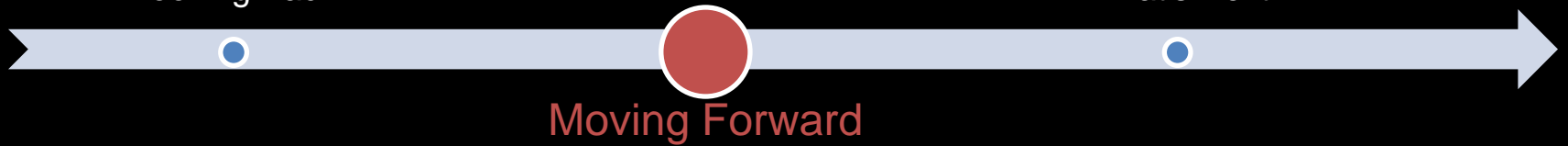
Metro Orlando Employment by Industry



Source: BLS, CES Payroll Survey

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Company Visitation Results

Positive News

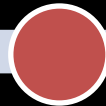
- 75% report sales growth
- 75% anticipate expanding
- Potential for 3,000 new jobs & investment of \$300M

Concerns

- 43% indicate legislative concerns (healthcare, regulation, taxes, uncertainty)
- 58% indicate workforce challenges (nearly 1,000 unfilled positions)

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Industry Trends

Aerospace & Defense

- Defense spending cuts
- Increased competition
- Importance of MS&T
- Workforce challenges

Information Technology

- Optimistic
- Increased sales
- New products/services
- Workforce challenges (Industry-wide)

Manufacturing & Distribution

- Optimistic
- Increased sales
- Productivity, Cost Cutting, Hiring
- Workforce skill set

Call Center / Back Office

- Strong growth
- Onshoring
- Supply of available workers

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Development Activity

- Creative Village
- Dr. Phillips Center for the Performing Arts (Phase 1)
- Orlando VA Medical Center
- Nemours Children's Hospital
- UF Research & Academic Center
- Florida Hospital's Nicholson Center for Surgical Advancement
- SunRail
- I-Drive Live

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Beating the Forecast

- Purposeful vs. Reactive
- Focused – ROI, Long-term, Near-term
- Aligning resources with plan
- Partnership
- Momentum

Q & A

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Thank you

