Orange, Osceola, Seminole Counties

Orlando

By Michael Candelaria
A Region United

For a region situated on the Florida peninsula, smack dab between the state’s two coasts, Orlando certainly is enjoying waves of good fortune and growth.
With apologies to fans of college football experiencing poll fatigue, the Orlando region places at or near the top in numerous national rankings for economic vitality and quality of life. Many of those rankings are subjective, of course. Yet, there also is plenty of performance proof that measures up.

Among the highlights:
- The region leads the nation in job growth, according to the U.S. Dept. of Labor, Bureau of Labor Statistics, adding more than 1,000 jobs per week across a broad base of industries.
- Notably, in 2017 the professional and business services industry (legal, accounting, computer systems design, management and administrative services) had the largest net gain with 13,200 new jobs, even outpacing the leisure and hospitality industry.

A few other notables from assorted polls:
- 2016, 2015 and 2014, with approximately $10 billion in transportation infrastructure in the queue; and No. 2 for “most competitive U.S. location for business.”
- You can look all of them up, prominently displayed on the web by the Orlando Economic Partnership (OEP), the agency responsible to keeping all that activity humming.

Clearly, the region is a competitive force. Just seemingly not too competitive within its own borders. In this mapping of three sprawling counties — Orange, Osceola and Seminole — the region offers evidence of playing quite well together.

“Citizens don’t know where the lines are that were drawn a hundred years ago. So, the ability to pull people together to really address the issues and opportunities that we all face together is a much better approach than trying to do it all independently on a much smaller scale,” says Tim Giuliani, president and CEO of the OEP, which itself is emblematic of regional cooperation. The OEP was created in 2017 when the Central Florida Partnership and Orlando Economic Development Commission were merged into one organization.

In another example, a few years ago when the Orlando Economic Development Commission was brainstorming its regional branding campaign “Orlando: You don’t know the half of it” — which lauds business and not necessarily tourism — attractions’ executives nonetheless were in the middle of the ideation. The campaign has become an unqualified success, with Giuliani commenting, “It’s been a regional effort, not outside of tourism, but with tourism.”

Adds Orlando Mayor Buddy Dyer, “I can unequivocally say that we collaborate in the region better than anybody in the country.”

“I can unequivocally say that we collaborate in the region better than anybody in the country.”
— Orlando Mayor Buddy Dyer
feel unstoppable
with the world’s smallest pacemaker

When a pacemaker ensures your heart never misses a beat, you can return to living a life of freedom and confidence. With advanced tools like the world’s smallest pacemaker—which can restore your heart’s rhythm in just minutes—is it any surprise we treat more hearts than any other hospital in the U.S.? That’s a reason to feel bold. Feel unstoppable. Feel whole.

AdventHealthCardiovascularInstitute.com
Former Orange County
Sheriff Jerry Demings
now is the county’s mayor,
replacing Teresa Jacobs,
who moves to chair of the
Orange County School Board.
Demings brings an obvious
focus on law and order to
the region’s most populous
county and arguably the
state’s hottest bed of activity.
Orange County is home to
the nation’s second largest
university and convention
center, an international airport
growing by leaps and bounds,
an emerging “medical city”
and, generally, enough
infrastructure construction
to make your head spin.
Downtown Orlando offers
a microcosm, where Mayor
Dyer, fresh off the success
of three mega venues (arts
center, arena and stadium
renovation) has sights set on
creating a $1 billion public/
private village on roughly 70
acres of prime real estate.
Essentially, Creative Village
will transform the former
Amway Arena site into a
mixed-use, transit oriented,
urban infill neighborhood
with an accent on education.
Most notably, the University
of Central Florida and
Valencia College will open a
downtown campus there in
August 2019, with approxi-
mately 7,700 students.
Similarly, the nearby
redevelopment of the
economically challenged
Parramore neighborhood
brings further opportunities
for growth, as does a nearly
hatched pilot redevelopment
initiative to address outdated
shopping centers, involving
tax rebates on properties
of nine acres and more.
Meanwhile, corridors
to the southeast and
southwest — Medical City
and International Drive, just
to name two — appear to
be broadening by the day.
Osceola County
“We can’t wait for things
to happen,” asserts Bob
Porter, the county’s executive
director of economic devel-
opment and strategy, who
cites a historical comparison
to Seminole County of the
early 1980s. Back then, famed
developer Jeno Paulucci and
his Heathrow community
stirred the residential and
commercial real estate pot,
resulting in the arrival of
the American Automobile
Association’s corporate head-
quar ters and related growth.
The same is happening
in Osceola.
“The future is ours, and
it’s almost a blank slate,”
says Belinda Kirkegard,
director of economic devel-
opment for Kissimmee,
the county’s largest city.
Both Porter and Kirkegard
point to NeoCity, a 500-acre
master-planned community
envisioned as a global center
for smart sensor, photonics
and nano-technology research
and development, and big
data/predictive analytics
with a potential long-term
economic output upward
BIG DOES THINGS DIFFERENTLY.

WHAT IS BIG? At UCF, big is so much more than size. Big is diverse and inclusive. Big is creative and collaborative. And big means doing things differently. That’s why U.S. News & World Report ranks UCF among the Top 10 most innovative universities in the nation — above Harvard, Johns Hopkins, Duke and all other Florida schools.

ucf.edu/big
As anticipation of widespread use of the driverless automobile nears, many industry analysts predict a decrease in parking needs for the near future. Even now, the use of ridesharing and other transportation options have some cities discussing or implementing a decrease to their parking requirements. The projected decline in future parking requirements and demand has many developers and municipalities exploring options for adaptive reuse or designing for future conversions of parking structures.

Although it is possible to adaptively reuse or design a parking structure for conversion to an office, mixed-use, living, or other space as changing needs may dictate, the associated costs for reuse or to prepare for unknown future structural modifications are astonishingly significant. Consider the following:

- **Leveling sloping floors** – In a customary parking structure, the floors require a slope to drain water properly. The materials required to level sloped floors for reuse also increase the load and represent additional future costs and costly current structural modifications to account for this future structural load.

- **Functional design misalignments** – Additional modifications likely to impact repurposing costs include enclosing the exterior skin, closing the ramp sections, the potential addition of stairs for reduced travel distances, and the extension of utilities.

- **Elevators and Stairs** – Most building types have a central core for elevators and stairs with building corners considered as a prime spot for occupancy. However, few parking structures have a central core and designers place elevators and stairs in building corners to make use of space that is generally not accessible for parking. The creation of a central core in a parking structure would create severe functional disadvantages. It may also require more square footage for placement of stairs and elevators internally, where you would normally locate parking to obtain the greatest efficiencies. Keeping stairs and elevators in corners of the future building type may reduce its value or desirability.
Changing code requirements – Despite compliance with current building codes during the original design of the parking structure for potential future use, the risk that building codes may change is a reality; and rarely do code changes become less stringent. If load requirements increase by the time the conversion is needed, the costs to adapt your now under designed building for other uses will then potentially represent very significant unanticipated costs.

Floor to floor height requirements – Floor to floor heights required for different uses should be provided for in the original design since additional clear height for mechanical systems above ceilings is a likely need when changing the use. This increase in floor to floor height could necessitate speed ramps which diminish the stall count and require the construction of additional square footage to maintain the current required stall count. As a result of these modifications, the foundation sizes and shear walls need to increase significantly, potentially requiring a more expensive deep foundation system. This can add 20-40% to your current garage cost.

Thanks to technology, our world is constantly changing – and affecting the way we occupy and use “bricks and mortar” buildings. Could you have predicted 25 years ago what you would be doing today and the technology you would use to accomplish it? Consider Amazon’s impact on e-commerce and traditional retail when it launched in 1994 or the introduction of the smartphone in 2007 and its subsequent impact on buying and selling through apps versus in person. It is difficult to predict how new technologies will further change the way we live, work and play. Similarly, the ability to predict how a parking structure could be adapted to accommodate a potential future requires many decisions about that future use 25-50 years ahead with no guarantees. Given that you must pay up to 100% more today to build a parking structure that you might convert in the future, the best case scenario for your return on your initial capital is zero – and even negative when you consider debt service.

While the idea to plan for changing parking needs is laudable, most, if not all, will find the first costs penalizing enough to abandon the idea quickly. Compounded with the costs to retrofit the building later, most are finding the risk is not worth the hypothetical reward.

About the Author:
Dan Helmick, PE is the EVP of Business Development at FINFROCK. As a vertically-integrated design-build firm, located in Central Florida, FINFROCK is the largest designer, manufacturer, and builder of parking structures in the United States. Dan has designed, priced and overseen construction of hundreds of parking structures in his career. You can reach him at dhelmick@finfrock.com or 407.293.4000.
of $28.5 billion, according to officials. At the center is BRIDG, a microelectronics fabrication facility seeking to bridge technology and capability gaps across multiple fields. It was established in March 2017 as a not-for-profit, public-private partnership with Osceola County and UCF.

Osceola, also home to the Florida Advanced Manufacturing Research Center, is positioning itself to be at the core of advancing technologies that will shape the future of automobiles, surgical devices, home appliances and other devices.

Additionally, while remaining rooted in tourism — ever heard of a place called the Walt Disney World Resort? — the county hopes to move forward on the wings of its airport. A fast fact from the aviation industry: A Boeing study shows that over the next 20 years, the industry will need 2 million new commercial pilots, maintenance technicians and cabin crew members.

Not coincidentally, in April 2018, the city of Kissimmee launched the Aerospace Advancement Initiative, encompassing incentive packages for aerospace businesses to complement aviation education at Kissimmee Gateway Airport, including Florida Aviation Academy, the first charter high school approved by the Federal Aviation Administration.

The “blank slate” is filling in.

**Seminole County**

Buoyed by the arrival of AAA all those years ago, Seminole County continues to attract headquarters and substantial outposts, such as Mitsubishi Hitachi Power Systems, Scholastic Book Fairs, Sears Home Improvement Products, Verizon and Deloitte.

At the same time, ongoing expansion at the Orlando Sanford International Airport, along with its active foreign trade zone, has heightened the industry profile of aviation here as well. The airport is expected to handle 3 million passengers for the first time in 2018, an increase of 63% from 2008. Last fall, Seminole High School in Sanford introduced an aviation-maintenance program as a “direct reaction to workforce needs,” cites Tricia Johnson, chief administrator of the county’s Office of Economic Development & Community Relations.

Likewise, the recently formed Seminole Economic Development Network (SEDEN) meets quarterly, bringing together players in economic development and education. The goal is to support local industry by helping shape classroom curricula in environmental sustainability, manufacturing, hospitality, aviation and other important sectors.

The county’s biggest news, however, comes from potentially turning old into new. Parkside Place is being proposed at the site of Flea World, a popular stop since 1982 that closed in 2015. Plans were reviewed in October by the Board of County Commissioners. The details: 4,076 multifamily units; 752 student housing units; a 184-unit independent living facility; a 312-bed assisted-living facility; 1.39 million square feet of office space, 340,000 square feet of retail space; and a 250-room hotel. The anticipated time frame for the estimated $2 billion project is 12 years, with development work to possibly begin later this year.

Says Johnson: “The name of the game [in Seminole County] is redevelopment.”
As the Vacation Home Capital of the World®, Kissimmee is the perfect destination for a weekend getaway, corporate retreat, or fun-filled family reunion. From condos and pool homes to luxury mansions – and over 22,000 options – these cozy abodes offer easy-access to the area’s popular theme parks, plus a bit of peace and quiet after adventure-packed days. With lavish amenities like themed bedrooms, outdoor kitchens, in-home theaters, and private swimming pools, you’ll never want to leave!

Find your dream home-away-from-home in Kissimmee, Florida. EXPERIENCEKISSIMMEE.COM
Listen to Jerry Ross, president of the Orlando-based National Entrepreneur Center, and it becomes clear he believes entrepreneurship has come of age across the region. “This is the place to be for the next innovation economy,” Ross asserts, adding, “The fact that Orlando is the top job creator in the United States for the last two years is not a surprise to us.”

Then Ross recites numbers: With 14 nonprofit business support organizations under one roof, the National Entrepreneur Center coached and trained more than 15,000 people in 2017, with a similar final tally expected for 2018. While most of those people are from Greater Orlando and Florida, 13 countries also inquired about the center’s services.

In addition, Ross notes that according to the Edward Lowe Foundation, 83% of businesses statewide have fewer than 10 employees and produce some 38% of the jobs in Florida, while 13% of the state’s businesses have 10 to 100 employees and produce another 33% of Florida’s jobs. “Anything we can do as a community to meet the needs of the 83% and move them up to the next 13%,” Ross says, “we can exponentially increase jobs. “We are planting the seeds and nurturing the garden that is producing the business that will provide the economic harvest of the future.”

It’s particularly true for tech innovation, as evidenced by such budding enterprises as ecoSPEARS, a cleantech company in Seminole County that is working with at least two global environmental clean-up companies and has received inquiries from cities and states that need to remediate their rivers with polychlorinated biphenyl (PCB) run-off from old transformers and building paints.

In Osceola County, BRIDG is a name and NeoCity is a place to remember. Through joint efforts of the county along with the University of Central Florida and the Florida High Tech Corridor Council, among others, BRIDG is a rising hub with global potential for advanced manufacturing focused on semiconductor-based processes and materials for smart sensor and photonic technologies. BRIDG moved into its 109,000-square-foot facility in March 2017.

“We really do think that this is a national asset, and it’s certainly something that the entire state of Florida should benefit from and should take advantage of,” touts BRIDG CEO Chester Kennedy. He also points to the nation’s generally decreasing foothold in semiconductor activity, adding that “having the capability to do microelectronics development back on U.S. soil is something that’s real important.”
Offering **MORE** direct access to the world with 150+ nonstop destinations, Orlando International Airport (MCO) together with the Hyatt Regency Orlando International Airport provides the ultimate travel experience. Picture yourself at the full-service hotel within MCO, whether for business or pleasure, and staying in our new guestrooms, enjoying the three hotel dining options, relaxing by the rooftop pool or staying fit at our new gym.

**MORE Conveniences**
**MORE Dining and Shopping Options**
**MORE Destinations**
**MORE Parking**

Orlando International is your FLORIDA airport of choice®

For more hotel information, visit [hyattregencyorlandointernationalairport.com](http://hyattregencyorlandointernationalairport.com) or call 407 825 1234.
At NeoCity, following 18 months of work with Osceola leaders and partners, the master plan calls for a long-term economic output in the neighborhood of $28.5 billion. The 2018 groundbreaking of NeoCity Academy, a forward-leaning high school that’s part of Osceola County Public Schools, is another positive sign for technology innovation.

In east Orlando, UCF’s Institute for Simulation & Training and the adjacent National Center for Simulation at Central Florida Research Park continue to be bedrocks, nurturing related growth. In southwest Orlando, Lockheed Martin’s Missiles and Fire Control facility recently opened the Innovation Center, a 6,500-square-foot space where “employees are empowered with the technology and tools to develop creative solutions to complex problems,” according to a press release. There are five specialized labs, and the company expects the center to help in the generation of new patents and multimillion-dollar contracts.

All across the Orlando region, there are approximately 2,300 companies creating technology.

**Transportation**

With $10 billion in current infrastructure work, the region’s theme of collaboration is perhaps most apparent — and most needed — in the transportation sector.

“Collaboration — it’s a treasure to have that in Central Florida,” says Laura Kelley, executive director of the Central Florida Expressway Authority (CFX). “Everybody is working together to have a cohesive transportation plan. … I really think that has propelled us to move things forward, because there truly is a cooperative environment.”

Examples: As part of the vast I-4 Ultimate project — a remake of 21 miles through Orange and Seminole counties — CFX contributed $230 million to the Interstate 4/State Road 408 interchange, despite not being responsible for the work. Also, CFX has granted key right-of-way access on its State Road 528 to Brightline’s emerging Miami-Orlando-Tampa passenger rail service.

The LYNX regional bus service now uses Lyft to assist with a “couple hundred” paratransit trips monthly. The Mears Cab Co. now is a partner, too, prompting LYNX CEO Edward Johnson to say: “You have the private sector doing this type of work, acting on behalf of a public agency. Wow, everybody is winning and we’re not competing against one another.”

Likewise, as part of its effort to “create a new gateway for Orlando,” what the Greater Orlando Aviation Authority has “tried to do is make sure everybody knows that this is the community’s airport,” says GOAA Executive Director Phil Brown. And, as an offshoot of
For the local physicians and businessmen who joined together to open a new hospital in Orlando 100 years ago, few could have foreseen this single hospital would evolve into a leading regional healthcare system, transforming healthcare in Central Florida and providing a century of caring for its residents.

Now, as we celebrate our centennial anniversary, we are honored to look to our rich, storied past as we begin the next 100 years — Inspiring a New Century.

Orlando Health®
E S T . 1 9 1 8
OrlandoHealth.com/100Years
the overarching Orlando Economic Partnership (OEP), the Alliance for Regional Transportation has been created to serve seven counties and 86 cities. Its purpose is to champion an improved multi-modal regional transportation system through the support of private and public projects.

With such unification in place, much infrastructure work is underway.

At CFX, 60% of its roadways currently are being widened, while rights of way are being reserved for potential new transit corridors. On average, more than 1 million toll transactions are recorded daily, 85% of them electronically. Most recently, CFX introduced E-PASS Xtra, a toll transponder that works on toll roads and bridges in 18 states from Florida to Maine and west to Illinois.

The ongoing work on the I-4 Ultimate project encompasses two new tolled express lanes in each direction, along with 13 widened bridges, 74 replaced bridges and 53 new bridges, among other components. Traveling east past the Walt Disney World Resort, you can’t miss it.

Yet, in characteristic style, regional officials come to the defense of construction pains. Tim Giuliani, president and CEO of the OEP, rhetorically asks: “Would you rather be sitting on the old I-4, wondering if anything was ever going to be done? Or would you rather deal with the progress, knowing that our region has made a $10 billion investment in infrastructure so that we can continue to handle our growth and continue to add jobs?”

Another comment: “If we can’t get people in and out of the airport [using I-4], then it doesn’t matter how many flights we have in; they don’t get served,” Brown says.

At LYNX, Johnson shows his eye is on the future with this statement: “We are no longer going to be just a simple bus company. We are going to be mobility managers.”

LYNX is partnering with other transportation providers so it can remain focused on fixed routes, while those partners are utilized for alternative passenger pick-ups off the beaten path. Johnson calls such a move “thinking more creatively to be able to meet the needs of our community.”

SunRail, the passenger rail system serving Orange, Osceola, Seminole and Volusia counties, continues measured, incremental expansion. Its first phase, opened in 2014, connects DeBary in Volusia to Sand Lake Road in Orange. In July 2018, the 17.2-mile Southern Expansion opened, connecting Sand Lake Road to Poinciana in Osceola.

Then there are GOAA’s plans at Orlando International Airport.

As part of a $4.2 billion capital improvement plan, construction and renovation projects began in 2015, with work commencing on the South Terminal Complex and enhancements to the North Terminal Complex. The South Terminal Complex and associated apron/taxiways encompass approximately 300 acres and 2.7 million square feet of construction.

The first phase of the
South Terminal Complex will feature 16 gates, with a flexible configuration that will be able to accommodate narrow body, jumbo and super jumbo aircraft. Construction is scheduled to be completed in mid-2021.

While that work is ongoing, conceptual plans already are in the works for phase two, as GOAA seeks to keep pace with growth. The final 2018 tally for passengers is expected to be roughly 47 million, although “comfortable operating capacity” is approximately 40 million passengers, according to Brown.

“Our vision ultimately is to be able to have plans ready, first conceptually and then detailed plans, as growth continues and that we can build in phases to make it economically feasible,” says Brown.

For good measure, ample growth in both passengers and commercial activity is apparent at Kissimmee Gateway and Orlando Sanford International airports, too.

Energy

“I’ve never seen anything like this. This is tremendous.”

Marc Hoenstine, director of economic development for Duke Energy in Florida, is talking about Duke’s $4.6 billion grid-modernization program, involving enhancements both to utility systems and customer service.

Duke is working to further storm-proof its delivery of power by going underground in many places across the region — 1,200 new miles — as well as replacing conductors and transformers and adding advanced remote meter-reading technology. Essentially, the program will cover the next 10 years for the company, which provides service to most of Orange County (except for areas serviced by OUC, the Orlando Utilities Commission), along with parts of Osceola and Seminole counties.

Solar is and will play a prominent role for Duke, OUC and others (notably, Florida Power & Light) to which Hoenstine comments, “There is a rush to find what land sites for solar would work.”

Duke has a goal of securing more than 700 megawatts of solar within the next years. With up to six acres required for production of each megawatt, the chunks of land are sizable. To date across the region, Duke has one such new solar project in operation, located in Osceola County, and others throughout Florida.

In 2011, OUC completed the first solar farm in Orange County at its Curtis H. Stanton Energy Center — a 5.9-megawatt solar photovoltaic array that provides energy to power more than 600 homes. In December 2017, Orlando’s goals for renewable energy and fuels gained traction with the dedication of OUC’s Kenneth P. Ksionek Community Solar Farm at the Stanton Energy Center. More than 37,500 solar panels are located on land once designated for a coal plant. Spread across 24 acres, the panels are capable of generating power for 2,100 homes.

Not coincidently, Orlando Mayor Buddy Dyer has a goal of having 100% of municipal electricity coming from renewable sources by 2030.
Health Care and Medical Sciences

With its highest level of capital dollars being invested, the region’s health care industry is, well, quite healthy. Similarly, the sophistication and effectiveness of related medical science is reaching new heights.

Strictly by the numbers, there are 4,800 health care-related companies and roughly 100,000 employees doing business, but the headline news comes from the region’s two biggest players: Florida Hospital and Orlando Health.

Florida Hospital now is AdventHealth, part of a national brand based in Central Florida. All of Adventist Health System’s wholly owned hospitals and hundreds of care sites across the country, including the entire Florida Hospital network, adopted the AdventHealth name effective Jan. 2, 2019. In Central Florida, that includes dozens of hospitals, Centra Care urgent centers and Florida Hospital Medical Group practices.

As part of the brand announcement, the organization also unveiled new initiatives that will “transform health care,” highlighted by the creation of the region’s first comprehensive genomic health center, with foundational work on the new center beginning this year.

“We’re creating a health care system that’s easier to navigate, simpler to understand, more convenient and — most importantly — focused on keeping people healthy,” says Daryl Tol, AdventHealth president and CEO, adding that the rebrand mapping had been in the works for three years. “We will be spending unprecedented investment dollars.”

AdventHealth is nationally and internationally recognized in cardiology, cancer, women’s medicine, neurology, diabetes, orthopedics and rehabilitation.

Historically, Florida Hospital performed more complex cardiac cases than any other facility nationwide. And it has one of the country’s largest and most comprehensive diabetes and endocrine institutes.

Orlando Health is putting an accent on “ease of use” with the addition of multiple freestanding emergency departments. Also, a co-branding partnership between Orlando Health and CareSpot Urgent Care encompasses eight existing urgent-care facilities and all future centers. Meanwhile, telehealth technology now is available in all emergency departments for diagnostics and treatment, with the newest efforts focusing on stroke care.

“Our motivation around this is how do we respond to the needs of the consumer,” says Gregory Ohe, senior vice president...
of ambulatory services for Orlando Health, adding that the moves were prompted by the arrival of President & CEO David Strong three years ago.

In 2018, Orlando Health’s Orlando Regional Medical Center, Dr. Phillips Hospital, South Lake Hospital and Winnie Palmer Hospital for Women & Babies gained accreditation as a Center of Excellence in Robotic Surgery by Surgical Review Corp. In 2017, Orlando Health was recognized as a “Most Wired” health care system by Hospitals & Health Networks for demonstrating achievement in facilitating patient access and capturing health data plus relying on increased clinical capabilities, telehealth and mobile technology.

Nemours Children’s Hospital, the hub of a 60-acre pediatric health campus at Lake Nona’s medical city, and the nearby Orlando VA Medical Center are other active players, both in health care and medical science. Medical
City, in fact, essentially is a 650-acre test lab for health care reinvention. One example: At Nemours, surgeons and radiologists are using the first FDA-approved segmentation software and data from CT and MRI scans to create exact three-dimensional models of young patients’ bodies. The models serve as roadmaps, enabling specialists to reduce procedure times and minimize unexpected finds in the operating room on complex cases.

The doctors can hold the models, usually made of filament or resins, cut into them to explore and even sew them back up. They even can hand parents the child’s model and explain what will happen during surgery and why. Additionally, the use of virtual reality equipment and what’s called “inter-operative holographic guidance systems” are on the way. In essence, doctors will be able to operate inside a child’s chest and have a picture of the heart in front of them.

### Health Care and Life Sciences Industry Leaders

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>.decimal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AcariaHealth Pharmacy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CuraScript</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DaVita RX</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Florida Blue</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kroger Specialty Pharmacy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mazor Robotics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prime Therapeutics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publix Specialty Pharmacy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sanofi Pasteur VaxDesign Corporation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Triad Isotopes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Xymogen</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Orlando Economic Partnership
You Know the Economic Impact of the Arts in Central Florida?

Direct economic activity generated annually by arts and cultural non-profits and their audiences:

$399.9 million

Number of jobs supported by the nonprofit arts and culture industry:

13,764 jobs

Nonprofit and for-profit creative industries comprise:

• 7,424 arts-related businesses
• 40,597 people employed

$39.9 million in culture-related revenue generated for state and local governments

United Arts partners with Americans for the Arts to conduct a nationwide study every five years. Arts & Economic Prosperity 5: The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the Central Florida Region – or AEP5 – released in 2017, confirms that the arts in our seven-county region are a smart investment.

The Creative Industries reports prove that our vibrant region exceeds national averages in the number of companies and people employed in both nonprofit and for-profit creative industries. For more information on these reports and to see additional research, visit www.UnitedArts.cc/research.
In explaining the dynamics behind perhaps the region’s most notable trend in education, Valencia College President Sandy Shugart offers a history lesson. With the Orlando region’s growth occurring relatively late on a national map, the region missed the “institutional building boom.”

So, while other areas of the country the same size as the Orlando area might have 20 or 30 colleges/universities to serve a population of roughly 2.3 million, Valencia joins only the University of Central Florida (UCF) and Seminole State College as local public institutions, along with private Rollins College.

There are several other integral places of higher learning, of course, each playing an important role — in all, more than 35 colleges, universities, technical schools and private institutions. UCF, Valencia, Seminole and Rollins clearly lead the way.

Shugart sees the scenario as both a challenge and an opportunity. His words: “Just a few of us can make a whole lot happen.”

Shugart isn’t necessarily pounding his chest. Instead, he’s making a point, noting he recently hosted a dinner gathering of six: the presidents of UCF and Seminole State, the superintendents of the three county public-school districts and himself. “If you tried to get together a similar meeting in Richmond, Charlotte, Austin or someplace like that, you’d have to get 50 people in a room. And then they wouldn’t actually be very engaged. Here, we can take it personally at the top and work things out,” Shugart states.

For the record, Valencia has more than 62,000 credit-seeking students at six campuses and produces the most Associate of Arts graduates in the United States. UCF is the nation’s second largest university by student population (68,000-plus) and has a new president, Dale Whittaker. Whittaker, who had served as UCF’s provost and executive vice president, took over last July, following the hugely successful 26-year tenure of John Hitt.

Seminole State also welcomed a new president, Georgia Lorenz, in 2018. Most recently, Lorenz had served as vice president of academic affairs at Santa Monica College in California. She succeeds Ann McGee, who had successfully presided for 22 years. Seminole State has approximately 30,000 students at six regional sites.

Rollins, with an increasingly diverse enrollment of nearly 3,500 students from more than 40 states and 30 nations, provides important private liberal-arts education. Its Crummer Graduate School typically is recognized as being among the best MBA programs in the nation.

More impressive is the collective strength across the region, with the overriding sentiment being “What can we do together?” Since its introduction in 2006, one example has been DirectConnect, a program that guarantees admission to UCF for associate degree graduates of Valencia College, Seminole State College and others.
Thank you to our clients, colleagues and community for 50 years of business and friendship.
More generally, it’s an approach that led newcomer Lorenz to praise the region’s “stronger sense of place.”

The same synergistic approach is evident in partnerships with industry on curricula development to create accelerated programs for job training.

According to Shugart, one of the region’s most pressing challenges centers on ensuring sustainable, full-time work with benefits for families on the low end of the economic scale. At the same time, employers have shortages of skilled people. That convergence has prompted certification programs, particularly for industries such as construction, where jobs have been unbundled into specialties for fast learning (in weeks).

“We think we can create real economic mobility for people on the bottom of the wage scale with very intensive, demanding, short-term training that leads to needed employment with benefits and a chance to grow,” Shugart explains.

K-12 school districts in the region — Orange County Public Schools, Osceola County School District and Seminole County Public Schools — are high-performing and award-winning with numerous accolades received, including the Broad Prize for Urban Education. They are routinely named to lists like “Most Connected,” “Best High School” and “Top of the Class.” Each district has innovative magnet programs as well as a focus on Advanced Placement and dual enrollment, STEM and robotics (as early as kindergarten), unique arts schools and personalized learning approaches. A strong private school system is also available.

Professional Services

By the numbers, the region’s legal and professional sectors are thriving.

With Orlando adding more than 1,000 jobs per week, those sectors are doing more than their fair share to absorb that growth through employment. In the past year or so, new jobs in legal, accounting, computer systems design, management and administrative services even have outpaced the leisure/hospitality industry.

A case in point is KPMG’s selection of the region (Lake Nona) for its global training center, not only resulting in 80 high-wage jobs but also demonstrating a fertile white-collar landscape for headquarters operations and the importance of two nearby international airports.

Among the corporate and regional headquarters and national companies with a significant presence are the American Automobile Association, Darden Restaurants, Deloitte Consulting, Electronic Arts, Lockheed Martin, Northrop Grumman, Tupperware Brands, Verizon and the Walt Disney Co.

Also, there are major U.S. operations of international companies, such as Germany’s Siemens Energy, Japan’s Mitsubishi Hitachi Power Systems, Israel’s Mazor Robotics and Australia’s Adacel. In all, more than 150 international companies from approximately 20 countries are represented.

Not coincidentally, the region’s
OUC remains ahead of the curve, offering commercial customers reliable, cost-effective and sustainable services. From OUCooling chilled water to electric vehicle charging stations to OUConvenient Lighting for both indoor and outdoor applications, OUC provides customized solutions that benefit customers, the community, and the environment. We’re here every step of the way to help you make smart business decisions while reducing capital investment and long-term operational costs.
banking and finance segment has followed suit, with increased strength and sophistication as a significant “money market.”

Another impact of the welcoming business attitude is the changing scene at law firms, where “there’s more work in areas that young [attorneys] think are cool,” says Jeff Jonasen, attorney and shareholder at Gunster in Orlando.

Ava Doppelt of Allen Dyer Doppelt & Gilchrist agrees, noting, “I think it’s a good place for [young attorneys] to practice.” As evidence, Doppelt pointed to the Orange County Bar Association’s Young Lawyers Section and its more than 750 attorneys.

When James Etscorn, managing partner of Baker Hostetler, arrived out of law school three decades ago, Orlando wasn’t necessarily a destination for law graduates starting out. “That’s not the case now,” Etscorn says. “Tings have changed dramatically, where young professionals want to be here, and I think that’s going to continue for several years.”

Etscorn and others cite industry growth in everything from aerospace, the military, high technology, entrepreneurship, artificial intelligence and science practices to the region’s evolution in sports, the arts and urban development.

Bill Dymond Jr., CEO/president of Lowndes, offers this general assessment: “The legal market follows the general economy, and Florida is hot.”

Notably — and appropriately because of the legal industry’s ties to economic development — Dymond was named chair-elect of the Orlando Economic Partnership for the 2018-2019 term.

On the insurance front, Tony Jenkins, Central Florida Market President for Florida Blue, cites a “combining of the minds” as perhaps the industry’s most notable trend. Insurance companies are expanding beyond traditional boundaries and partnering with health care providers in a quest to serve customers more efficiently and help reduce related costs, or at least keep them under control.

Example: By the end of 2018, Sanitas Medical Center had planned to open eight fully bilingual medical facilities in the Orlando area, building on a partnership that began in 2015 and already serves more than 200,000 Florida Blue members in South Florida and Tampa Bay. The new centers are designed to provide family primary care services, comprehensive urgent care, laboratory and diagnostic imaging services, and educational programs.
TOP
ranked
IN THE south

For more than 20 years, *U.S. News & World Report* has ranked Rollins among the top two regional universities in the South and first in Florida.

**NO. 1 OR NO. 2 REGIONAL UNIVERSITY IN THE SOUTH**

**NO. 1 COLLEGE IN FLORIDA**
*College Consensus* (2017—2018)

**NO. 1 MOST BEAUTIFUL COLLEGE CAMPUS**

**NO. 1 MBA IN FLORIDA AND NO. 44 IN THE NATION**

**NO. 1 IN LEADERSHIP AND ORGANIZATIONAL DEVELOPMENT PROGRAMS**
*HR.com* (2016—2018)

**NO. 1 MOST PHILANTHROPIC COLLEGE CAMPUS**
*BestCollegesOnline.com* (2012)
Workforce

“It’s a good problem to have,” says Pam Nabors, president and CEO of CareerSource Central Florida, in talking about the good-news/not-so-good-news scenario of the labor market across the Orlando region. While there are plenty of jobs available, and people to fill them, there still are workforce voids that must be addressed in a variety of industries to ensure continued vitality.

The region is among the nation’s leaders in job growth, according to the U.S. Dept. of Labor, Bureau of Labor Statistics, adding more than 1,000 jobs per week. That number matches the state’s growth of roughly 1,000 new residents per day. Recent counts put net job gains in the professional and business services sector at the top, with construction employment increasing the fastest by year-over-year percentage.

Using data from the Bureau of Labor Statistics, while representing 11% of the state’s population, Orlando has added more than 20% of the new jobs during the past four years. And a bit deeper dive reveals a talent pipeline of 500,000-plus students within a 100-mile radius. All totaled, Orlando’s labor pool consists of more than 1.2 million people.

That fertile ground for labor has been attractive to employers such as KPMG, which in 2015 began searching for a location to accommodate its new global learning, development and innovation facility. As part of KPMG’s largest capital investment ever, the location needed to fit a long list of criteria, including workforce. KPMG

The region’s talent pipeline includes 500,000-plus students within a 100-mile radius. In total, Orlando’s labor pool consists of more than 1.2 million people.
started with 49 potential cities before shortlisting to nine sites and ultimately selecting Orlando (Lake Nona) over Dallas in January 2017. That’s the good news.

More challenging is the task of connecting the dots — matching people to the jobs that are most needed to fill labor voids, like hospitality workers to serve the region’s 72 million visitors annually, or construction workers to keep pace with growth, or health-related workers in a bevy of fields (from surgical technicians to administrative support). To illustrate: In health care and life sciences, the region has nearly 5,000 companies and 100,000 workers, according to data used by the Orlando Economic Partnership. Still, that’s not enough.

To help meet demand, CareerSource Central Florida is partnering with primary education providers and technical colleges to create accelerated programs that train quickly, such as Valencia College’s construction boot camp. In six weeks, workers can receive a variety of certifications. Similarly, organizations, such as the Central Florida Hotel & Lodging Association, partner with CareerSource for hospitality employment.
“To get a good well-paying job you do not need necessarily have a four-year degree. You need to have a skill and a credential, but certainly not a four-year degree,” Nabors says.

Clearly, there are jobs, and there are people. And there are opportunities, both for job seekers and for prospective employers.

It’s a matter of finding matches.

“We’re spending a lot of time talking to job seekers about what is growing in this region and where they can step into the talent pipeline,” Nabors says.

### Top Employers

<table>
<thead>
<tr>
<th>COMPANY</th>
<th>INDUSTRY</th>
<th>EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walt Disney World</td>
<td>Leisure &amp; Hospitality</td>
<td>74,200</td>
</tr>
<tr>
<td>Adventist Health System / Florida Hospital</td>
<td>Health Care</td>
<td>28,959</td>
</tr>
<tr>
<td>Universal Orlando (Comcast)</td>
<td>Leisure &amp; Hospitality</td>
<td>25,000</td>
</tr>
<tr>
<td>Publix</td>
<td>Grocery</td>
<td>19,783</td>
</tr>
<tr>
<td>Orlando Health</td>
<td>Health Care</td>
<td>19,032</td>
</tr>
<tr>
<td>University of Central Florida</td>
<td>Education</td>
<td>9,476</td>
</tr>
<tr>
<td>Lockheed Martin</td>
<td>Aerospace/Defense</td>
<td>9,000</td>
</tr>
<tr>
<td>Resource Employment Solutions</td>
<td>Staffing &amp; Recruitment</td>
<td>8,280</td>
</tr>
<tr>
<td>Darden Restaurants</td>
<td>Restaurants</td>
<td>6,137</td>
</tr>
<tr>
<td>SeaWorld Entertainment</td>
<td>Leisure &amp; Hospitality</td>
<td>6,032</td>
</tr>
<tr>
<td>Valencia College</td>
<td>Education</td>
<td>4,733</td>
</tr>
<tr>
<td>Siemens</td>
<td>Advanced Manufacturing</td>
<td>4,448</td>
</tr>
<tr>
<td>Rosen Hotels &amp; Resorts</td>
<td>Leisure &amp; Hospitality</td>
<td>4,307</td>
</tr>
<tr>
<td>Westgate Resorts</td>
<td>Leisure &amp; Hospitality</td>
<td>4,286</td>
</tr>
</tbody>
</table>

*Excludes government and retail operations  
Source: Direct Company Contact, Orlando Sentinel, Orlando Business Journal
Talent and solutions for your company.

Consulting Solutions, Project, Contract and Interim Solutions & Professional Temporary Staffing

Accounting & Finance
Technology
General Administration & Operations

Vaco’s internal teams are made up of industry veterans from national firms, Fortune 500 companies, and top recruiting agencies. They know qualified talent when they see it, so you get the expertise you need, right when you need it.

For the past 13 years, Vaco has been a proud member of the Orlando business community and beyond with locations in Orlando, Tampa, South Florida and Jacksonville.

For more information: vaco.com | 321.445.2100
Construction and Real Estate

With $10 billion-plus in infrastructure projects underway, there’s a lot of commercial construction happening in Orlando. The highlights, of course, are I-4 Ultimate’s highway remake and the expansion of Orlando International Airport.

Yet, there’s much more.

Near the end of 2018, approximate tallies for commercial building showed continued steady increases for both permitting and actual work — with the office market exhibiting a decline in vacancy rates to below 8%, along with higher rents, and much of the same promise occurring on the industrial-market side. Just in downtown Orlando, more than 1 million additional square feet of construction was announced — bolstered by the rise of Creative Village.

Meanwhile, residential projects, both for single-family and multifamily housing, continued on a similar trajectory. Third-quarter 2018 regional housing starts, for example, were up 15% over third-quarter 2017, according to Metrostudy data.

All of that activity led Bob McClelland, director of business development at Wharton-Smith Inc., one of the largest locally based general contractors, to make this statement: “It’s a good time to be here.”

And, with new construction a proven economic driver, that’s potentially good news across the region. Think more jobs.

It’s certainly been good news for design/build firm Finfrock, whose recent success is emblematic of the vitality. The company’s revenues grew to more than $224 million in 2017, up 116% from 2015, which led to its own 7,000-square-foot-office expansion in 2018. And there’s a backlog of work through 2020, valued at $500 million, as reported by the company.

In October at the national...
Dodge Data & Analytics Construction Outlook conference, Dodge Chief Economist Robert Murray saluted the industry’s growth in 2018 but cautioned with the comment that “the supportive factors affecting construction become less certain moving into 2019.” Perhaps that will turn out to be prophetic across the country. In Orlando, however, signs are continuing to point up.

Looking to Grow Your Business? Let the Florida SBDC at UCF Help You!

Our team of highly credentialed and experienced consultants is committed to your success. Our expertise is focused on areas vital to accelerating market growth, including strategic market research, access to capital, financial analysis, international trade, government contracting, and more.

Make better business decisions with our professional, no-cost business consulting.

Florida SBDC at UCF

State Designated as Florida’s Principal Provider of Business Assistance (§ 288.001, Fla. Stat.)
The Arts

Can the arts be an economic driver? Recent achievements of the Dr. Phillips Center for the Performing Arts offer ample evidence for an emphatic, yes.

Located in downtown Orlando, the center experienced a 10% year-over-year increase (July 2017 to June 2018) in operating revenue earned from the shows and events it presents, capping four years of growth in operating revenue, which now is up 48% since the arts center opened in November 2014. Further, as reported by center President and CEO Katherine Ramsberger, during the past fiscal year the center raised nearly $8 million in corporate and private donations and contributed more than $200 million in economic impact from show and consumer spending. All of that was achieved while presenting 440 performances, including 141 local arts and community events that featured 14 genres and 16 different languages.

Yet, the biggest result likely is this: The center has become a showcase of philanthropy with private and public funds working together to “really build a sense of community,” says Ramsberger, who added that “great cities are built by philanthropy.”

Notably, the center isn’t yet complete. The final planned piece, Steinmetz Hall, is under construction as a 1,700-seat, “acoustically perfect” performance hall scheduled to open in spring 2020. “We didn’t build this arts center because it’s a building. We built it because it has a meaningful purpose,” Ramsberger concludes, pointing to widespread public and private community partnerships.

In addition to the Dr. Phillips Center, the region is home to a diverse array of arts, science and history organizations, with many of them under one umbrella, United Arts of Central Florida, which essentially serves as a one-stop shop for support and funding of the arts community. Since its founding in 1989, United Arts has invested more than $146 million in local organizations and education. It funds more than 70 cultural groups, ranging from the Orlando Ballet and Orlando Philharmonic Orchestra to the Enzian Theater and the Bach Festival Society of Winter Park.

Similarly, Osceola Arts is the convening organization for Osceola County, producing more than 150 performing and visual arts events annually, headlined by the 1,974-seat Osceola Performing Arts Center, which also has a 17,200-square-foot exhibit hall.

In Seminole County, rich cultural diversity is evident in such places as the Wayne Densch Performing Art Center, built in 1923; the Central Florida Zoo & Botanical Gardens, among the largest zoos statewide; and the Zora Neale Hurston National Museum of Fine Arts, located in Eatonville, the first incorporated all-black city nationwide.
QUALITY OF LIFE IS OUR BUSINESS

In addition to providing funds, the Edyth Bush Charitable Foundation dedicates significant resources to strengthening and developing leadership for the nonprofit sector. The Foundation aims to inspire thoughtful collaborations that address Florida’s most pressing needs. Guided by Edyth Bush’s vision, the Foundation remains dedicated to creating innovative civic solutions that help people help themselves.

WE’RE HERE FOR GOOD | EdythBush.org
Visit us on Facebook/EdythBushCharitableFoundation

AFP International OUTSTANDING FOUNDATION
Sports

The victories keep coming. Or, as Steve Hogan, CEO of Florida Citrus Sports, says, “We’re a big-league city; we have a lot of teams to root for.”

Indeed, Hogan, for one, has been busy. Florida Citrus Sports for decades was rooted in producing college-football bowl games, most notably the Citrus Bowl. Now, its biggest bang for the buck comes by virtue of hosting the National Football League Pro Bowl. The 2018 Pro Bowl, for example, wasn’t just a game played last January that drew more than 51,000 fans (despite rain) to 65,000-seat Camping World Stadium. It was the culmination of a weeklong schedule of activities that had a decided family-friendly feel.

Hogan calls the event a “landmark moment for Orlando and our reputation as a preferred destination for world-class sporting events.” The Pro Bowl returns this year, with the game played on Jan. 27.

Nearby sits 25,500-seat Orlando City Stadium, built entirely with private funds. And while the team hasn’t won much lately, Orlando will host the 2019 MLS All-Star Game this summer “in recognition of Orlando City Soccer Club’s emergence as a preeminent organization,” Major League Soccer announced in fall 2018.

Literally just down the street — Church Street — at the Amway Center, the NBA’s Orlando Magic generates plenty of economic-development dollars, with an adjacent $200-million entertainment complex now underway and scheduled for completion in 2021.

Among other regional highlights, in 2016, Orlando became the “new home of American tennis,” with the U.S. Tennis Association building more than 100 tennis courts as part of its USTA National Campus. At about the same time, Seminole County added a $27 million sports complex, with 15 synthetic-turf fields accommodating baseball, softball, lacrosse, football and soccer, all designed to attract regional and national youth tournaments on more than 100 acres. And its economic scoreboard is promising, marked by increases in county hotel-bed tax revenues.

Of course, the area’s 100-plus well-rated golf courses have their own allure, and the PGA’s Arnold Palmer Invitational is played in Orlando each spring, attracting approximately 145,000 fans.

Generally speaking, there are numerous showcases for the region’s brand as a place to live, work, play and do business, according to Hogan. “We throw a jersey on what happens here,” Hogan says. “Our team is Orlando.”
WE MAKE
EVEN ONE’S FAVORITE
MEETINGS

IT PAYS TO MEET IN KISSIMMEE!
Up to $10,000 per meeting

Take your next meeting from the boardroom to the great outdoors in sunny Kissimmee. With more than one million square feet of meeting space and nearly 300 venues, this easy-to-access destination is on the doorstep of world-famous theme parks, incredible dining, championship golf courses, and exhilarating teambuilding activities (we’re talking ziplines and airboat rides!). Plus, with an impressive meeting incentive program, the possibilities are limitless.

Make memorable meetings in sunny Kissimmee, Florida.
EXPERIENCEKISSIMMEE.COM/MEETINGS
Tourism

Vacation Capital of the World?

George Aguel, president and CEO of Visit Orlando, along with other executives in tourism have diligently worked with economic-development officials throughout the region with the understanding that a rising tide will lift all. And so, they have invested both time and money to ensure vitality, industry by industry, across the board.

Yet, there is no mistake to be made. Aguel and his counterparts are clear in pronouncing that tourism drives the ship in the Orlando region. “The Orlando brand is known globally, and I don’t think that would be the case if we weren’t world famous for our tourism and our destination as a place to come and visit,” Aguel says, adding, “We have two or three Super Bowls of activity every night.”

A few numbers: Tourism annually generates approximately $71 billion in economic impact and supports roughly 449,000 jobs (41% of Orlando’s workforce). Visitor spending, in the neighborhood of $45 billion, provides more than $2 billion in state taxes and $3 billion in local taxes. Also, since 2009, visitation has increased 55%, while visitor spending is up 75%.

In Osceola County, where much of the activity occurs under the Orlando brand, 8.6 million overnight visitors each year equal $6 billion in annual economic impact, according to Experience Kissimmee, the county’s official tourism authority.

In turn, many visitors arrive for fun and ultimately wind up doing business, Aguel notes, primarily referring to the Orange County Convention Center, the second largest convention facility in the United States. Already attracting approximately 1.4 million attendees to more than 200 conventions and events, the center is in the midst of a $605-million campus improvement plan that will bring more meeting and exhibit space. Aside from being tops in family visits globally, “we are also the No. 1 meeting and convention destination, which means people actually like to do business here,” Aguel comments.

As a result, “Locals get to live large.”

Notably, that comment doesn’t come from a tourism official but from land developer Rasesh Thakkar, senior managing director of the Tavistock Group, which is best known for creating Lake Nona, a community located a long stretch of highway from the theme parks. Thakkar’s point: By virtue of the region’s investments in support of tourism, residents are afforded uncommon abundance in dining and entertainment, arts and culture, and recreational amenities, among others.

Tourist Development Tax (TDT) dollars are subsequently used to build and strengthen Orlando, in general. TDT dollars helped to build the initial phase of the Dr. Phillips Center for the Performing Arts, completed in 2014, and Amway Center arena, opened in 2010, plus helped to finance the 2014 renovations to Camping World Stadium in downtown Orlando.
In addition, tourism reaches far northward to places such as downtown Sanford in Seminole County, where restaurants and pubs are experiencing renewed vigor.

Another impact is in luxury vacation housing. Example: In the shadows of Disney—or perhaps more aptly, in its glow—Golden Oak is rising as a community of single-family custom homes with prices starting at $2 million. The community is anticipated to include approximately 300 homes and encompass 980 acres, making a statement as its own attraction. “Getting someone to come down to visit can also acquaint them and familiarize them with this place in a way they might not have considered,” says Aguel.

And don’t expect the investments, particularly at the theme parks, to stop. Aguel adds: “You can never say, ‘I’m done, and I’ll go do nothing else for the next 10 years.’ The nature of this [tourism] industry requires that you keep adding and expanding experiences all the time.”
Orlando’s Future Trajectory

“How do we keep the trajectory moving?”

That question comes from Tim Giuliani, president and CEO of the Orlando Economic Partnership, who quickly answers it for himself: “For us to keep on this current path, we’ll have to really double down on our efforts or else we’ll just fall behind, because the changes will come too fast.”

His explanation, simply, involves competition. “Every other city in America is trying desperately to compete for the same jobs and improve their communities, as well,” Giuliani reasons. “So, it’s very easy to get hung up on we’re No. 1 on this list. We’ve upped our game, and I think there are a lot of positive things happening in our region. But every other city in America is trying to do the same exact thing.”

Indeed, while the Orlando region certainly has opportunities, there also are challenges.

The area is among the nation’s fastest-growing in population and jobs. That isn’t likely to change anytime soon. Yet, can the region meet the future demands both from residents and employers?

For one, new Orange County Mayor Jerry Demings, formerly the Orange County sheriff, says, “it’s been a bit of a challenge” in the recent past to manage such factors as transportation, sprawl and safety. Also near the top of his agenda is an investment in youth and low-income communities. His question: “How do we expose that segment to its full potential? … Everyone must have a seat at the table.”

There are other areas where challenges lie ahead.

Orange County’s Creative Village project offers huge potential as a public-private partnership of major players. Will its reality measure up?

In Osceola County, BRIDG debuted in 2017 with established industry partnerships and great fanfare at the newly christened NeoCity. As Osceola looks to leverage high-tech entrepreneurship to broaden its economic base, success depends greatly on those nascent endeavors.

In a couple years, if you haven’t heard of Parkside Place rising in Seminole County — and you probably will have — that could spell troubling news. Amid continued growth, there still remains a search of long-term economic footing.

Similarly, if the expansive I-4 Ultimate project isn’t significantly closer to completion by, say, 2021 — at least somewhat close — opportunity will have turned into a challenge.

George Aguel, president and CEO of Visit Orlando, doesn’t think such disappointment will occur. Given the magnitude of his industry, Aguel has perhaps as much to lose regionally as anyone. He doesn’t think it will happen, citing what just might be the region’s greatest strength: collaboration.

Aguel’s parting message: “I just don’t find anybody who just says ‘no.’ They’re always going to say, ‘Let me think about how to figure something out with you.’ That’s the interesting constant that I find very prominent. It’s basically more of a can-do than a can’t-do.”

“To keep on this current path, we’ll have to really double down on our efforts … We’ve upped our game, and I think there are a lot of positive things happening in our region.”

— Tim Giuliani, President, Orlando Economic Partnership
Build Your Future in SANFORD

- Family Friendly Living
- Business Friendly Attitude
- Educated Workforce
- Excellent Transportation Network
- Positioned for Growth
People to Know

In a region that demonstrates the value of collaboration, success assuredly requires movers, shakers and newsmakers. But mostly, the chief driving force behind Orlando is composed of leaders willing to pitch in together to make a difference. Here are some of them.

John F. Davis
Executive Vice President
Orlando Regional Chamber

Jim Dean
Executive Vice President, SeaWorld

Jerry Demings
Mayor
Orange County

Ava Doppelt
Partner
Allen Dyer Doppelt & Gilchrist

Mayanne Downs
President & Managing Director
GrayRobinson

Tracy Duda-Chapman
Senior Vice President, DUDA

Buddy Dyer
Mayor, City of Orlando

William Dymond Jr.
CEO & President, Lowndes

William Finfrock
President, Finfrock

Don Fisher
County Manager, Osceola County

Flora Maria Garcia
President & CEO
United Arts of Central Florida
Andy Gardiner  
Senior Vice President of External Affairs and Community Relations  
*Orlando Health*

---

Deborah German  
Vice President for Health Affairs, *University of Central Florida College of Medicine*

---

Tim Giuliani  
President & CEO  
*Orlando Economic Partnership*

---

Rick Goings  
CEO, *Tupperware Brands*

---

Linda Landman Gonzales  
Vice President  
*Orlando Magic*

---

Nicole Guillet  
County Manager, *Seminole County*

---

Marc Hoenstine  
Director, Economic Development  
*Duke Energy*

---

Steve Hogan  
CEO, *Florida Citrus Sports*

---

Daryl Holt  
Vice President and Group COO  
*Electronic Arts*

---

John Horan  
Chair, *Seminole Board of County Commissioners, District 2 Commissioner*

---

Mark Israel  
President & COO  
*Universal Engineering Sciences*

---

Erik Jacobsen  
President  
*Deseret Ranches-Ag Resources Cattle Division*

---

Barbara Jenkins  
Superintendent  
*Orange County Public Schools*

---

Tony Jenkins  
Market President, *Florida Blue*

---

Edward Johnson  
Chief Executive Officer, *LYNX*

---

Derek Jones  
Central Florida Region President  
*Wells Fargo*

---

Garry Jones  
President, *Full Sail University*

---

George Kalogridis  
President, *Walt Disney World Resort*

---

Laura Kelley  
Executive Director  
*Central Florida Expressway Authority*

---

Chester Kennedy  
CEO, *BRIDG / International Consortium for Advanced Manufacturing Research*

---

Belinda Kirkegad  
Director of Economic Development  
*City of Kissimmee*

---

Gene Lee  
President & CEO  
*Darden Restaurants*

---

Alex Leitão  
Chief Executive Officer  
*Orlando City Soccer Club*

---

Georgia Lorenz  
President  
*Seminole State College of Florida*

---

Suneera Madhani  
CEO/Founder  
*Fattmerchant*

---

Mel Martinez  
Chairman, Southeast U.S and Latin America  
*JPMorgan Chase*

---

Alex Martins  
CEO  
*Orlando Magic*

---

Harvey Massey  
Chairman & CEO  
*Massey Services*

---

Bruce McDonald  
General Manager  
*Hyatt Regency Orlando International Airport*

---

DT Minich  
President/CEO  
*Experience Kissimmee*
People to Know

Michael Moore
Vice President and Counsel
First American Title

John Morgan
Founder
Morgan & Morgan

Wanda Riley
Director of Operations
Cushman & Wakefield

Harris Rosen
President
Rosen Hotels

Jerry Ross
President
National Entrepreneur Center

Ed Schons
President
Florida High Tech Corridor

Jill S. Schwartz
Managing Partner
Jill S. Schwartz & Associates

Terry Shaw
President and CEO
Adventist Health System

Sandy Shugart
President
Valencia College

David Siegel
President & CEO
Westgate Resorts

Thomas Sittema
CEO
CNL Financial Group

David Strong
President & CEO
Orlando Health

Rasesh Thakkar
Senior Managing Director
Tavistock Group

Daryl Tol
Senior Executive Vice President,
Adventist Health System;
President/CEO, Florida Hospital and the
Central Florida Division

Jeff Triplet
Mayor, City of Sanford

Craig Ustler
President
Ustler Development / Creative Village

Mark Wang
President & CEO, Hilton Grand Vacations

Dale Whittaker
President
University of Central Florida

Tom Williams
Chairman & CEO
Universal Parks & Resorts

Jim Zboril
President, Tavistock Development

LeRoy Pernell
Interim Dean and Professor of Law
Florida A&M University
College of Law

Kay Rawlins
Founder, Vice President of Community
Relations & Foundation President
Orlando City Soccer Club

Katherine Ramsberger
President and CEO
Dr. Phillips Center for the
Performing Arts

David Odahowski
President & CEO
Edyth Bush Charitable
Foundation

Jerry Ross
President
National Entrepreneur Center

Tom O’Neal
Associate VP for Innovation &
Entrepreneurship
University of Central Florida

Wanda Riley
Director of Operations
Cushman & Wakefield

Jerry Ross
President
National Entrepreneur Center

Pam Nabors
President & CEO
CareerSource Central Florida

David Strong
President & CEO
Orlando Health

Rasesh Thakkar
Senior Managing Director
Tavistock Group

Daryl Tol
Senior Executive Vice President,
Adventist Health System;
President/CEO, Florida Hospital and the
Central Florida Division

Jeff Triplet
Mayor, City of Sanford

Craig Ustler
President
Ustler Development / Creative Village

Mark Wang
President & CEO, Hilton Grand Vacations

Dale Whittaker
President
University of Central Florida

Tom Williams
Chairman & CEO
Universal Parks & Resorts

Jim Zboril
President, Tavistock Development