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Opportunity

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Metro Orlando ECONOMIC DEVELOPMENT COMMISSION



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Executive Summary



Metro Orlando's highly visible entertainment industry has resulted in a worldwide brand associated with imagination, storytelling and customer service.

Behind the scenes, a \$13.4 billion technology industry has grown up alongside the palm trees and theme parks.

Even more interesting is the growing crossover between technology and entertainment. Orlando's strength in both of these industries has placed it at the forefront of this revolution and encouraged innovation in other sectors. Clear examples are in the digital media, life science, simulation and photonics industries. The entertainment and travel industry is also providing a workforce that is second to none in terms of customer service. This skill has been put to work at a variety of Metro Orlando companies that understand the client is number one.

Orlando's labor market is strong and scalable. It is young, diverse and skilled – fully capable of meeting the demands of growing business operations.

- Metro Orlando has a technically savvy and customer-service oriented labor pool that is capable of meeting the demands of customer contact operations. The labor pool is sustained by a nationally ranked in-migration of new residents seeking job opportunities and an affordable, high-quality lifestyle. Over one third of the population is between the prime working ages of 18 to 34; an essential demographic supporting shared service operations.
- Metro Orlando is home to more than 25 colleges and universities, including the 3rd largest in the country, and more than 50 professional and technical schools. Our workforce is highly educated and supported by a wealth of degree and continuing education programs throughout the region.
- Major corporations have chosen Metro Orlando for mission-critical customer service operations after extensive national and international site evaluations. Examples include: Oracle, AIG, Hewitt & Associates, Siemens, Bank of New York, Walt Disney World Resort, Bank One and Fiserv. Metro Orlando is also home to many notable corporate headquarters including: Darden Restaurants, Inc., HD Supply, Mitsubishi Heavy Industries, AirTran Airways and Tupperware Brands Corporation.

Orlando offers opportunity for growth, while achieving costs savings for businesses and employees.

- Metro Orlando is a global business platform with positive international name recognition equal to that of metropolitan areas two to three times its size. Yet Orlando has highly competitive business costs.

Orlando's infrastructure is strong and continues to grow, positioning the community for sustainable growth.

- Metro Orlando has the ability to move people and data at speeds companies demand. Orlando International Airport is a non-hub/spoke dependent airport with room to grow, competitive fares and a diverse, high frequency route structure. The region possesses a new and fully redundant, self-healing telecommunications infrastructure – a benefit of more recent capital investment for asset development in the Southeast. Metro Orlando is the only MSA in nine southern states served by two incumbent local exchange carriers (AT&T and CenturyLink). All major inter-exchange carriers are represented in the market.
- Metro Orlando is virtually the geographic center of Florida, offering almost equidistant access to the state's other major metro centers. At the intersection of Florida's Turnpike and Interstate 4, the region has quick access to both Interstates 75 and 95, providing expedient travel both northbound and southbound. The Orlando-Orange County Expressway Authority manages the Eastern Beltway (SR417) and the Western Beltway (SR429). These two systems combined provide a regional transportation loop connecting all major submarkets, and major residential and employment centers.
- When it's time to fly, Orlando International Airport (MCO) boasts direct, non-stop service to 72 domestic cities and 20 international cities. Orlando International Airport ranked "#1 in passenger satisfaction" by J.D. Power & Associates. Air fares are competitive since its largest carrier controls only 20% of the flights.

Executive Summary



Orlando's affordable yet high quality of living supports the relocation of executive staff and the senior members of critical operations teams.

- Major corporations have relocated executive staff to Central Florida easily and have found little difficulty in relocating key, mid-level employees. This is due in part to the style and quality of living at appreciably lower costs.
- Much of Orlando's sustained growth can be attributed to its moderate cost of living. Orlando offers diverse, affordable housing in proximity to a variety of employment centers supplemented by recreational and cultural amenities. More than just being affordable, Orlando offers all the amenities of a mega market without the daily logistical headaches. Orlando boasts ballet, one of the top orchestras in the state, the NBA's Eastern Conference Champions Orlando Magic, the Arnold Palmer Invitational and other PGA tour events, college bowl games, pre-season Major League Baseball, as well as all of the entertainment options associated with being known as the world's #1 tourist destination.

Orlando's educational institutions have demonstrated the capability and expertise to fulfill the needs of sophisticated corporate operations.

- The University of Central Florida (UCF) has grown with Metro Orlando boasting an astounding total enrollment of more than 56,000 students. UCF has quickly achieved recognition as America's #1 partnership university. Their commitment to partnership is best represented by corporate and industrial affiliations with some of America's best known companies, including Electronic Arts, Oracle, Siemens, Lockheed Martin, and Hewitt & Associates. These critically important relationships have driven the university's programs to a high standard of excellence, exceeding the expectations of corporate recruiters and business leaders in the region.
- Metro Orlando is served by three state/community colleges—Valencia College, Seminole State College of Florida, and Lake-Sumter Community College—which are committed to meeting the workforce needs of local businesses. Valencia College, which serves Orange and Osceola counties, ranks second in the nation in total number of associate degrees awarded and fifth in associate degrees awarded to minorities.
- Rollins College is recognized as one of the nation's 50 "Best Value" private colleges and universities according to *The Princeton Review*, and is the top regional university in Florida according to *US News & World Report's* annual rankings. The college's Roy E. Crummer Graduate School of Business is noted for excellence in graduate management education and lifelong learning programs. Rollins currently has an enrollment of nearly 4,000 students from more than 40 states and 30 nations.
- Metro Orlando is home to more than 50 professional and technical schools whose specialties include aviation and aerospace, digital media, health services, computer software, nursing, customer service, hospitality management, and law.

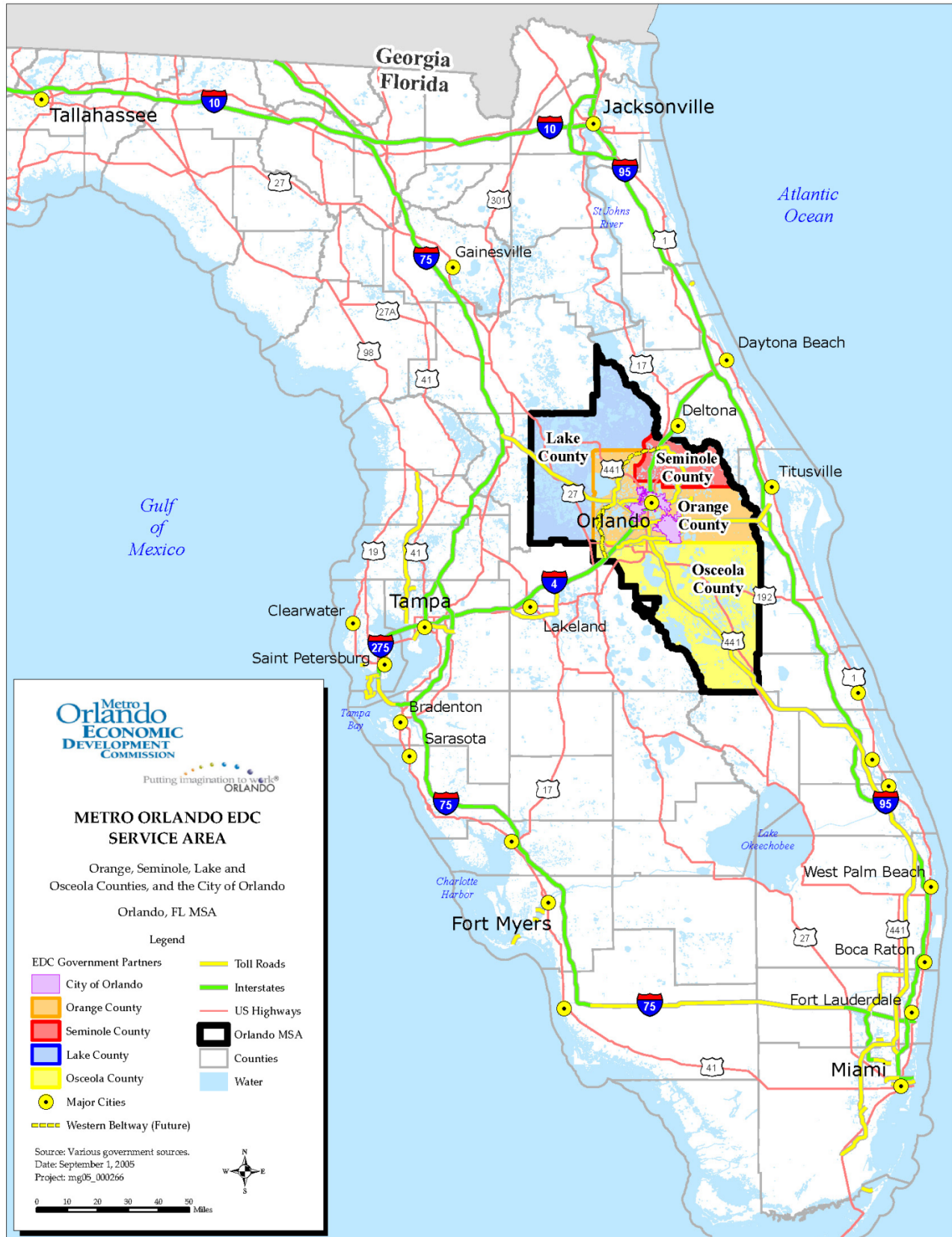
Recent Metro Orlando Rankings:

- Metro Orlando ranks in the Top 10 on the 2010 list of "Most Wired Cities."
Forbes.com
- Florida ranks 5th for states with the most business-friendly tax systems.
Tax Foundation, 2010
- Florida ranks as the #3 state to do business in the 2009 "Best & Worst" survey.
Chief Executive magazine
- Orlando ranks as the 7th best city in which to start a small business.
BizJournal - 2009
- University of Central Florida is the 2nd largest university in the nation.
2010
- Orlando ranks as the 4th most popular city, based on where people want to live.
Pew Research Center - 2009
- Orlando ranks 11th among 2008 "Best Performing Cities."
Milken Institute
- Orlando called a Global Hot Spot!
BusinessWeek, What Makes a Winner - 2006

Location & Infrastructure



Metro Orlando



Location & Infrastructure



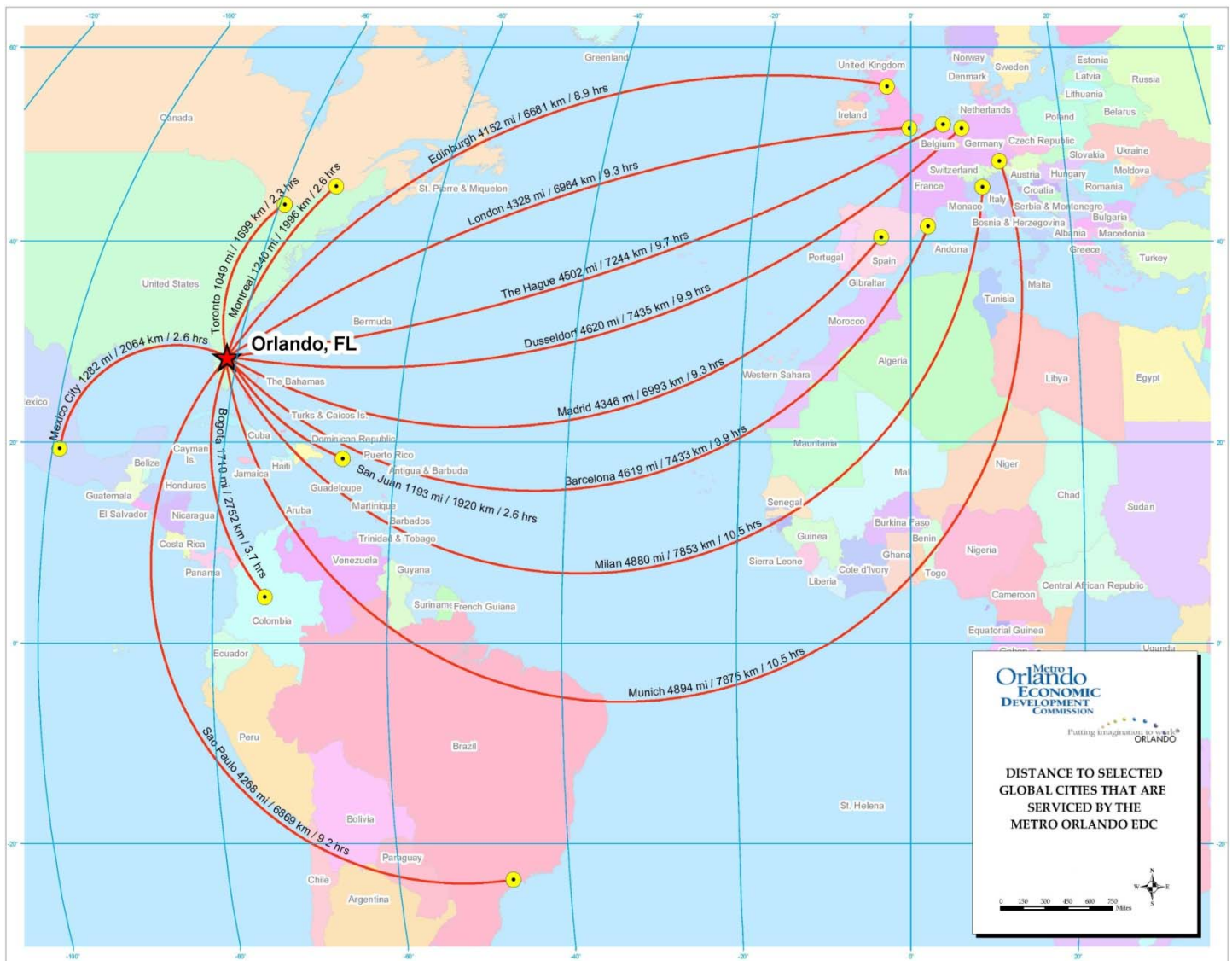
Accessibility

Easily accessible to the entire world, Metro Orlando boasts a world-class international airport that has been ranked the second best airport in the world for customer service. The region is also served by six other airports and extensive rail systems that help transport freight across the nation.

Port Canaveral and the Atlantic Ocean are within a 45 minute-drive and the Port of Tampa on the Gulf of Mexico is only an hour away, putting European, North American and South American markets at our gateway. On land, the region sits at the crossroads of Florida's highway network, serving as a hub for distribution.

Proximity to Major Markets

Strategically positioned in the center of Florida and the Americas, the Metro Orlando region consists of 3,491 square miles (2.2 million acres) and four counties.



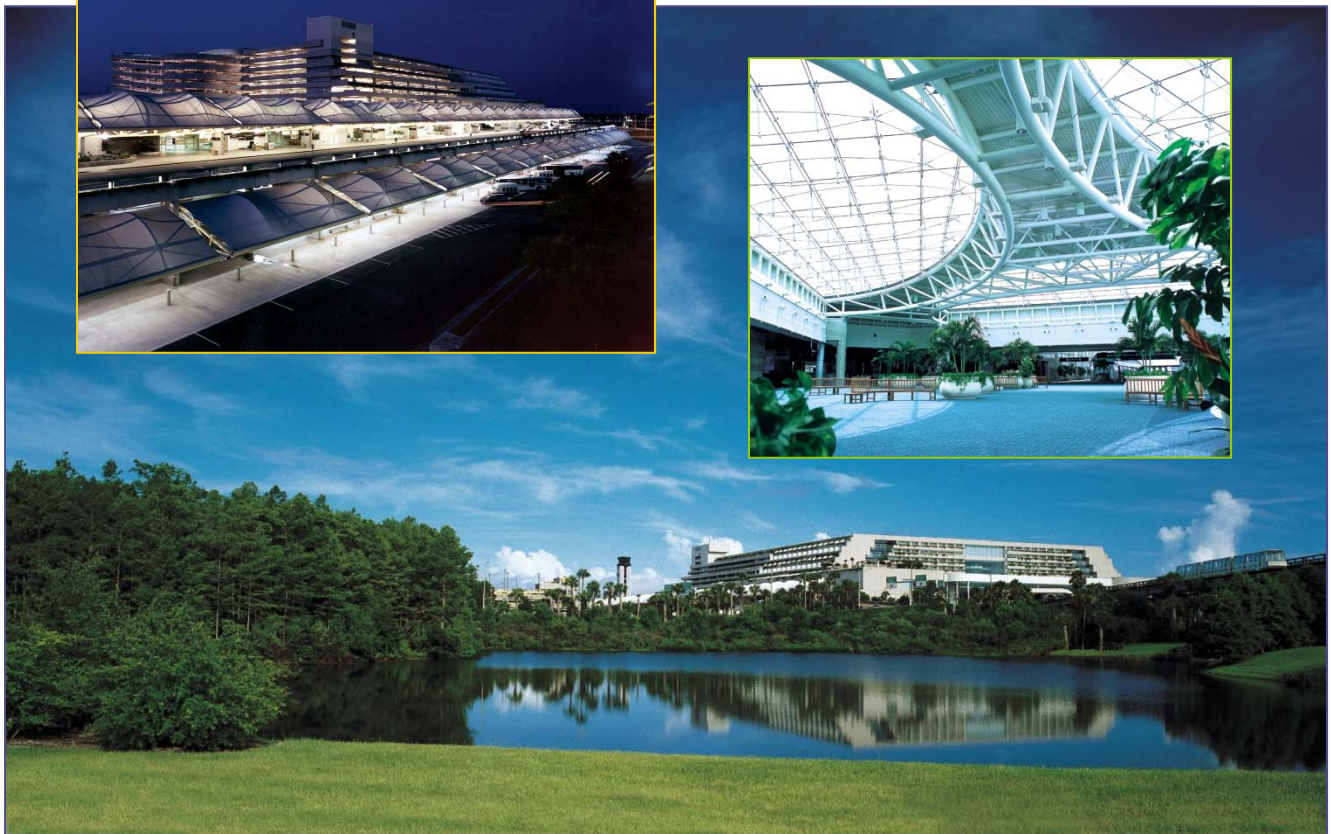


Air Transportation

Metro Orlando's business environment is strengthened by the presence of a world-class international airport that is consistently recognized for excellence in customer service, and six other regional airports that provide travelers with a variety of options.

Orlando International Airport

- More than 34 million passengers served in 2010
- 3rd largest airport in the nation for domestic origin and destination
- 4th best airport in the world for customer service
- 11th fastest-growing major airport in the world
- 2nd busiest airport in Florida; 13th in the nation; 27th in the world
- More than 980 arrivals and departures daily
- Scheduled non-stop service available to 81 domestic destinations and 26 international destinations (including direct flights to Mexico City, Mexico and Frankfurt, Germany)
- 17th largest port of entry for international visitors in the continental United States.
- 168,124 tons of cargo in 2010
- Foreign Trade Zone No. 42, a 205-acre park, offers duty exemptions or deferments for companies receiving materials from foreign countries.
- More than 15,000 acres, the third largest parcel of airport property in the country. Only 35 percent of airport property is developed, leaving large areas available for expansion.





Orlando Sanford International Airport

- 8th busiest airport in Florida in total passengers
- Four paved runways ranging from 3,750 to 9,600 feet long
- Rated for wide-body air carriers, with a Federal Aviation Authority air-traffic control tower, approved instrument approach, aircraft service facilities and U.S. customs office
- Foreign Trade Zone No. 250
- 395-acre Sanford Airport Commerce Park with rail service available in its western sector
- 50,000-square-foot cargo building, in the Sanford Airport Commerce Park, enables cargo handling, pallet preparation and receiving.
- \$25 million expansion added a two-story terminal complex of more than 120,000 square feet. Increasing total number of gates to 12.
- 13,500-square-foot incubator—the Airport Enterprise Center



Kissimmee Gateway Airport

- Closest public airport to Walt Disney World Resort and other area attractions.
- 900-acres and two paved runways, 6,000 feet and 5,000 feet in length, can accommodate all corporate aircraft and many commercial airliners.
- Instrument approaches for all-weather access.
- Available services include fuel, maintenance, avionics, hangars, flight instruction, aircraft charter and rental cars.
- 26-acre industrial park for aviation and non-aviation related businesses.
- Regulation, 18-hole golf course on site.

Leesburg International Airport

- 30 miles northwest of Orlando.
- 5,000-foot paved runway and 6,000-foot runway expansion.
- Recently added U.S customs and border inspection office.
- Accommodates general aviation and corporate pilots with 24 hours a day services which include FBO facilities, fuel, flight instruction, maintenance, refurbishing, navigational aids, hangar space, and open tie-down space.
- Industrial zone accommodates small industrial cargo.
- Expansion program includes air traffic control tower, rescue fire station, new FBO facility, and precision instrument landing system.

Orlando Executive Airport

- 25th busiest general aviation airport in the United States.
- Aside from meeting both personal and corporate flying needs, services include flight instruction, aircraft sales and rentals, maintenance, charter, storage, and air ambulance services.
- 1,056 acres owned by the City of Orlando.

Mid-Florida Air Service Airport

- Located in Eustis (Lake County).
- 3,000-foot lighted runway suitable for most general aviation.

Orlando Apopka Airport

- Located in Apopka (Orange County).
- 4,000-foot paved runway.
- FBO and self-serve AvGas and JetA fuel, conference room, hangar space and aircraft maintenance.

Location & Infrastructure



Roads

- Florida's Turnpike and Interstate 4 bisect in Metro Orlando.
- Other major state roadways include U.S. 441, 17/92, 27 and 192.
- Toll roads include State Road 528, State Road 408, State Road 417, and State Road 429 – 100 miles encircling Metro Orlando. The Orlando-Orange County Expressway Authority (OOCEA) manages this network of roads including large portions of a beltway around Orlando. The OOCEA operates an electronic toll collection system known as E-PASS, one of the first and most widely-used systems of its kind in the U.S.
- The 12.5-mile Osceola Parkway links the international airport to major attractions and a half dozen regional arterial highways.
- LYNX, an extensive public transportation system, serves Orange, Seminole and Osceola counties. LYNX is the first transit agency in the nation to build, produce and utilize its own B-20 Biodiesel blend for bus fleet conversion and the first to distribute B-20 to other regional agencies.
- Lymmo is a state-of-the-art, three-mile, dedicated lane bus system in downtown Orlando, available free-of-charge.





Seaports

Atlantic Ocean: Port Canaveral

- Major deep-water port of entry, 50 miles east of Orlando. Depths range from 39 ft. to 41 ft.
- World's only quadramodal foreign trade zone, interchanging freight among sea, land, air and space.
- Encompassing more than 4,000 acres, Foreign Trade Zone 136 is among the largest foreign trade zones in the country.
- Containerized, refrigerated, project, ro/ro, bulk and breakbulk cargo service from Central Florida to the rest of the world.
- Shortest direct entry on the East coast, with only 45-minute travel time from first sea buoy to anchorage.
- Six cruise terminals serving four cruise lines.
- Second busiest cruise port in the world.



Intercoastal Waterway: Port of Sanford

- Located in Seminole County at intersection of Interstate 4 and U.S. Highway 17-92.
- River barge access via St. Johns River to Lake Monroe.
- 250,000 square feet of industrial and distribution space.
- 350-foot main pier and bulk unloading pier of 100 feet.

Gulf of Mexico: Port of Tampa

- 70 miles west of Orlando.
- Among top 10 in United States in tonnage handled.
- Largely a bulk commodities port.



Rail

- Class I CSXT and the Florida Central Railroad, part of the Pinsky Railroad Company, service the region.
- Two major, full-service freight stations move goods between north and south Atlantic points.
- Connections with all major U.S. rail lines.
- Six daily northbound and southbound freight trains.
- Amtrak operates passenger service between New York and South Florida; four stations in the region.
- Amtrak Auto Train boards in Sanford/Seminole County.

Amtrak Transportation

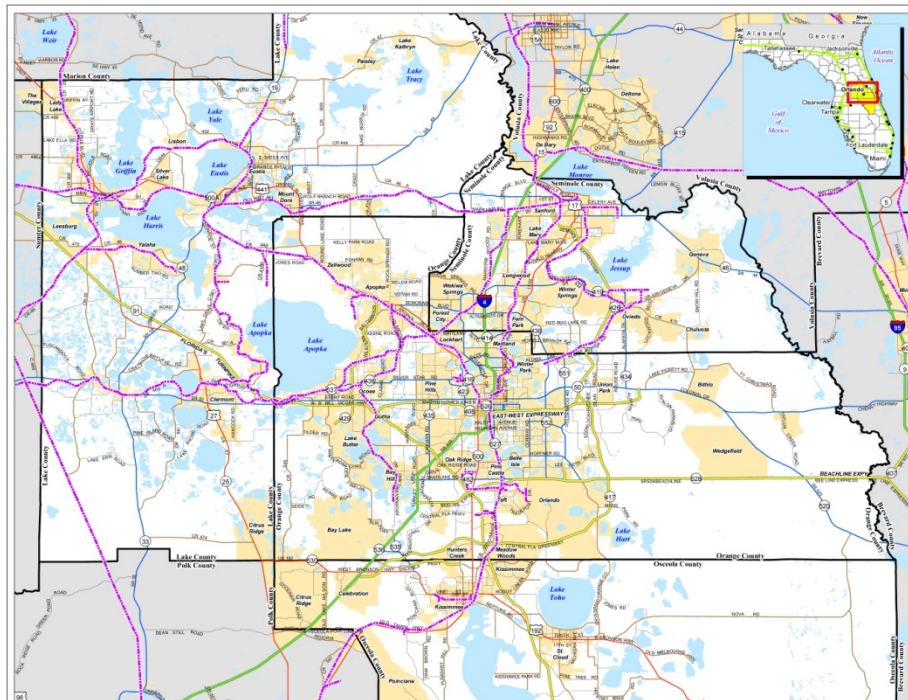
Amtrak provides passenger service from Metro Orlando to many cities in the U.S. If you want your car where you're going and you just don't want to drive it all the way there, bring it aboard the Auto Train with service between Sanford, FL and Lorton, VA. Amtrak has many partnership programs with other travel-oriented corporations that can make traveling easier. These partnerships include: Continental Airlines, United Airlines, Alaska Airlines, Icelandair, AAA, Hertz and Greyhound.

CSX Transportation (CSXT)

The largest rail network in the eastern United States, CSXT is the core business unit of CSX Corporation. CSXT provides rail freight transportation over a network of more than 23,000 route miles in 23 states, the District of Columbia and two Canadian provinces. With its headquarters in Jacksonville, FL and key facilities in Tampa, Orlando and Pensacola, CSXT owns and maintains approximately 1,750 route miles in Florida. Their customers represent some of the state's largest industries, specializing in processed foods, phosphates and fertilizers, forest products and manufactured goods. The company employs more than 6,800 Florida residents.

Florida Central Railroad (FCEN)

The Florida Central Railroad was established in 1986 and expanded in 1990 as part of the Pinsky Railroad Company. It is located in the heart of central Florida. The FCEN operates 68 miles of track and directly serves industries in Orlando, Plymouth, Zellwood, Mt. Dora, Tavares, Eustis, Umatilla, Ocoee, and Winter Garden. All interchanges are made with CSXT in Orlando, Florida. Due to its centralized location, the FCEN provides a competitive alternative to trucking and easy access to markets across Florida.





Commercial Real Estate

Metro Orlando offers a variety of commercial and industrial real estate options - ranging from urban space in downtown Orlando to rural land in Lake and Osceola Counties and everything in between. This region's robust inventory includes over 175 million square feet of industrial space and nearly 91 million square feet of office space. And unlike many other metros, Orlando can still accommodate build-to-suits with a variety of developable land parcels in the region.

Metro Orlando Real Estate Market Conditions

	Existing Inventory (sq. ft.)	Under Construction (sq. ft.)	Vacancy Rate	YTD Net Absorption (sq. ft.)	Lease Rate
Office	98.1 million	421,552	14.3%	460,005	\$18.98/sq. ft.
Industrial (Flex & Warehouse)	179.7 million	9,810	12.2%	374,638	\$5.35/sq. ft.

Source: CoStar, 1st Quarter 2011

Utilities

State-of-the-art, high-capacity, reliable and competitive ... these are the attributes for which Metro Orlando's utility and communication systems are most noted. Progressive, modern systems —and backup systems—enable utility companies to deliver uninterrupted service to customers at highly competitive prices.

Average Number of Customers in 2009 by Class of Service

Utility	Type	Residential	Commercial	Industrial	Other	Total
Florida Power & Light**	Investor Owned	3,984,496	501,095	10,092	3,433	4,499,116
Progress Energy**	Investor Owned	1,441,325	161,390	2,487	24,970	1,630,172
Kissimmee Utility Authority	Municipal	52,156	8,841	902	0	61,899
City of Leesburg	Municipal	NR	NR	NR	NR	0
City of Mount Dora	Municipal	4,814	777	57	84	5,732
Orlando Utilities Commission	Municipal	179,106	25,061	26	13,316	217,509
City of Winter Park	Municipal	11,402	1,066	1,085	272	13,825
Reedy Creek	Municipal	9	335	885	57	1,286
Sumter Electric Cooperative	Rural Cooperative	152,594	14,459	996	31	168,080

Source: [Florida Public Service Commission](#)



Telecommunications

The Metro Orlando region has the most advanced telecommunications assets in the Southeast. Orlando is the only MSA in nine southern states served by five incumbent local exchange carriers – AT&T, CenturyLink (formerly Embarq), Smart City Telecom, tw telecom (formerly Time Warner Telecom), and Level 3 Communications. Their competition has fostered the highest possible degree of customer service, capital investment, innovative system applications, and extremely aggressive pricing.

All of Metro Orlando's telecommunication central offices are fiber optic with digital switching, and 100 percent of the fiber optic systems are fully redundant and self-healing. The regional fiber optic network is so extensive it is referred to as a fiber optic "cloud" by industry experts. Fiber-based service throughout the region meets and regularly exceeds the services provided in very location-specific "info parks" or "smart parks." If a company's top Metro Orlando real estate selection initially lacks fiber-based infrastructure, extensions have been completed in as little as 30 days.

The cornerstone technologies that constitute today's most advanced telecommunications services are available, including: Ethernet, Frame Relay Networking, Asynchronous Transfer Mode (ATM), Integrated Services Digital Network (ISDN), Synchronous Optical Networks (SONET) Rings, Internet, Intranet (LAN) and Extranet Services (WAN).

AT&T, CenturyLink, tw telecom, and Level 3 Communications will undertake any specialized deployment of technologically intense applications, including Fiber to the Premise (FTTP), on a case-by-case basis. As three of the largest providers of professionally engineered voice, data and videoconferencing systems, they have established reputations for delivering intense "built-to-suit" telecommunications suites. The assets found in Metro Orlando include: data cabling systems, automatic call distribution, interactive voice response, pbx and key systems, network consulting and design, structured wiring, distance learning solutions, hubs/servers, routers/switches, multiplexers, digital T1, T3, OC3, OC48, OC192, and Gigabit Ethernet; maintenance service plans, switched multimegabit data service, virtual private networks, symmetrical and asymmetrical/high-bit-rate/very high-bit-rate digital subscriber lines, multiple POP's, local and wide-area networks, and integrated campus communications.

The telecommunications capacity in Metro Orlando is demonstrated by the concentrated telecommunications requirements of technical education institutions and existing industries, which range from unique entertainment giants like Walt Disney World Resort and Universal Orlando, to corporate headquarters such as Tupperware Brands Corporation, Darden Restaurants, Inc., and the American Automobile Association. Consider also the needs of numerous office operations such as Charles Schwab & Co., First USA, Cincinnati Bell Information Systems, Hewitt & Associates, CNA Insurance and high tech manufacturers like Lockheed Martin. These organizations' capacity and performance in Metro Orlando attest to the level of telecommunications service available in the region.



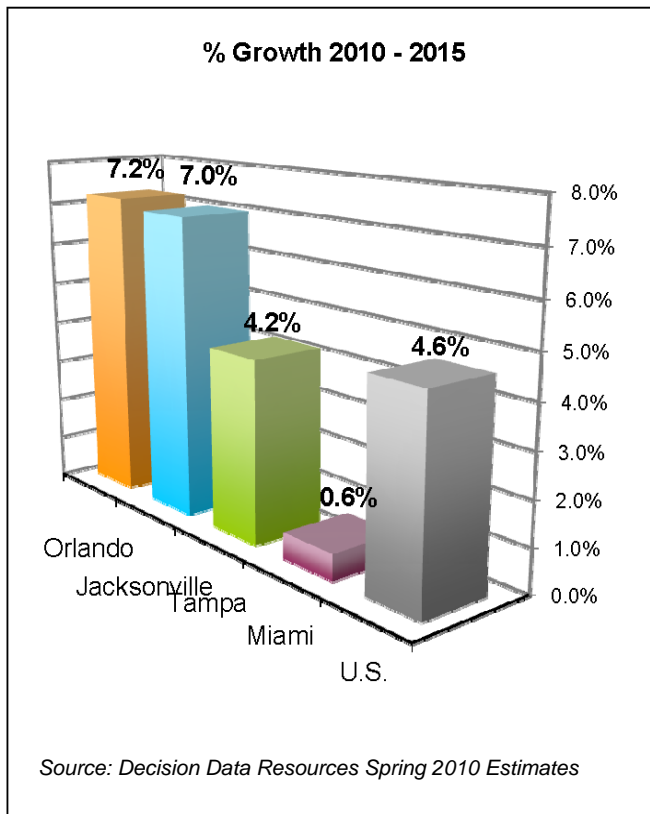
Population

Already with a population of more than 2 million, Metro Orlando is projected to be among the nation's fastest-growing regions in this decade. With over one third of its population between the ages of 20 and 44, and a median age of 37.6, Metro Orlando is a young and vibrant community.

Demographic Detail Report Metro Orlando

	2000 Census		Spring 2010 Estimate*		2015 Projection	
Population						
Total Population	1,644,561		2,099,977		2,250,893	
Population Density (per sq. mi.)	410.1		523.6		561.3	
Total Households	625,248		798,485		894,263	
Female Population	835,181	50.8%	1,059,214	50.4%	1,133,340	50.4%
Male Population	809,380	49.2%	1,040,762	49.6%	1,117,552	49.7%
Race and Ethnicity						
American Indian or Alaskan Native	5,657	0.3%	5,125	0.2%	4,558	0.2%
Asian or Pacific Islander	45,841	2.8%	80,149	3.8%	96,762	4.3%
Black	227,868	13.9%	325,378	15.5%	367,137	16.3%
White	1,233,085	75.0%	1,444,166	68.8%	1,482,881	65.9%
Other	84,661	5.2%	153,145	7.3%	190,221	8.5%
Multi-Race	47,449	2.9%	92,014	4.4%	109,334	4.9%
Hispanic Ethnicity	271,627	16.5%	498,157	23.7%	608,486	27.0%
Not of Hispanic Ethnicity	1,372,934	83.5%	1,601,820	76.3%	1,642,407	73.0%

Source: Decision Data Resources Spring 2010 Estimates



Three states—Florida, California and Texas—will account for nearly one-half (46 percent) of total U.S. population growth between 2000 and 2030, according to Census Bureau state population projections. Consequently, Florida, now the fourth most populous state, would edge past New York into third place in total population by 2011.

-U.S. Census, April 2005





Workforce

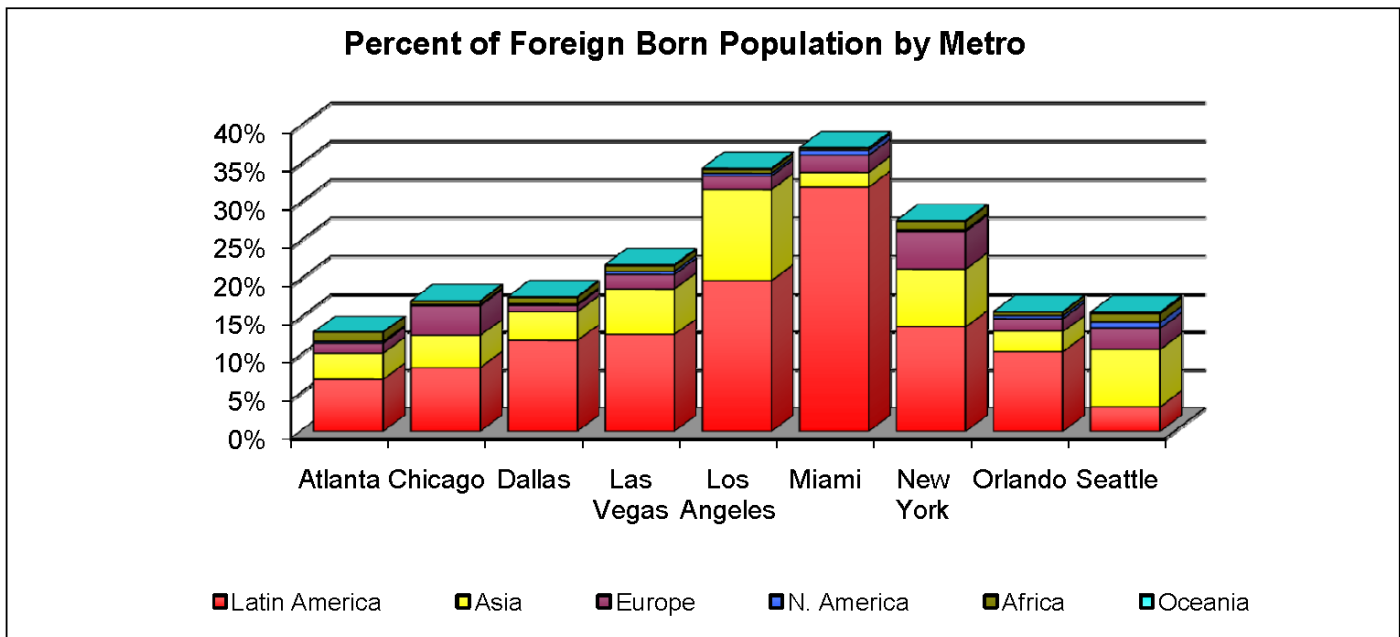
Metro Orlando's workforce is fast-growing, young, well-educated and diverse. The region's median age is 37.6, with over one third of its population between the ages of 18 and 44.

Our workforce is highly educated and supported by a wealth of degree and continuing education programs. With 25 percent of the region's population having completed a bachelor's degree or higher, and another 30 percent having completed at least some college – it's easy to see that Metro Orlando's employee base is well-educated.

The diversity of a region's workforce impacts its ability to nurture innovative thinking and offer residents a high quality of life. No matter what level of skill is needed, the regional workforce is well prepared. Companies also have access to state-sponsored workforce training grant programs that allow them to keep employees on the cutting-edge in their respective fields.

	Median Age
Miami	40.9
Philadelphia	38.7
New York	38.6
Seattle	38.4
Milwaukee	38.3
Orlando	37.6
Las Vegas	35.7
Los Angeles	35.7
San Diego	34.8

Source: Decision Data Resources Spring 2010 Estimates



Source: U.S. Census, 2009 American Community Survey

Workforce Central Florida (WCF)

In collaboration with the Metro Orlando EDC, Workforce Central Florida (WCF) connects employers to a large pool of talent and provides worker resources and training, in addition to offering significant matching grant training funds to regional employers.

Direct services are provided at nearly 100 One-Stop Centers with locations in every county. At the state level, Florida's Quick Response Training and Incumbent Worker Training programs help new and existing businesses access training grants that help their workers maintain cutting-edge skills and keep pace with new technologies. Florida businesses may also qualify for tax and cash incentives up to \$8,500 per employee for hiring individuals leaving welfare for work and other labor pools.

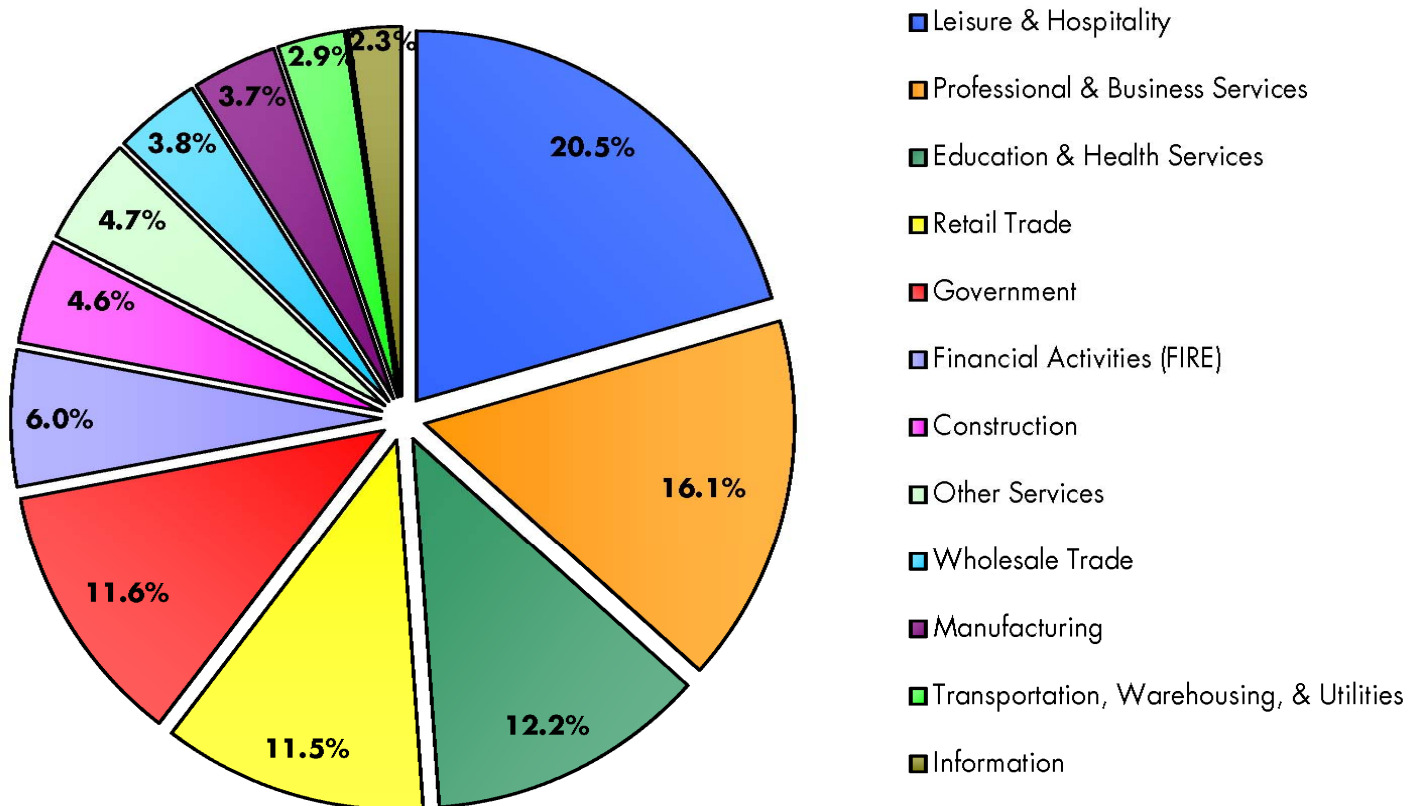




Industry Sectors

Metro Orlando's industry mix is distinctive and diverse. Recognizing this region's strategic advantages as a hub for global commerce, more and more major employers, as well as entrepreneurs, are calling the region home.

Employment by Industry
Metro Orlando



Source: Florida Agency for Workforce Innovation – Released May 20, 2011

The Metro Orlando area has a strong high tech industry of 2,600 companies and more than 42,000 employees with a payroll of \$2.7 billion. Top sectors include film and digital media; modeling, simulation and training; optics and photonics; aviation/aerospace; homeland security/defense; financial services technology (fi-tech); information technology; cleantech; and life science/biotechnology. Companies also have access to a strong university system and an environment of technological innovation and infrastructure supporting the region's established technology sectors.

An established technology sector means that companies growing or relocating to the area have immediate access to a technology ecosystem that has been building since the 1960s. This includes immediate access to a highly skilled workforce, university research and development, partnership opportunities, and organizations and facilities dedicated to helping high tech companies flourish.



Aviation & Aerospace

"Metro Orlando offers many strengths to the aviation and aerospace industry – an abundance of land available adjacent to runways for hangars, maintenance, air cargo, and other aviation related facilities; ample supply of power and recycled water capabilities for manufacturing facilities; and a world-class simulation and training cluster. This industry will only continue to grow here."

— Jim Laria, Aviation Consultant

The aviation and aerospace sector in Metro Orlando has developed from a collection of military installations and small airstrips to become a hub for global commercial air travel, advanced flight training, air defense projects and space exploration.

Aviation in the region is anchored by the first-rate Orlando International Airport. One of the top airports in the world, Orlando International Airport is frequently cited as a key advantage to companies doing business in Metro Orlando. With more than 50 airlines, scheduled service to over 100 domestic and international locations and thriving air cargo operations, companies across a diverse range of industries can easily transport both people and goods to virtually anywhere in the world.

Metro Orlando is also served by Orlando Sanford International Airport, a smaller, but fast-growing facility, as well as a number of well-regarded regional airports. Located less than an hour from the renowned NASA launch facilities at Kennedy Space Center, Metro Orlando is a prime location for the region's aviation and aerospace industry.



Defense contract powerhouse Lockheed Martin is a stronghold in the region, earning billions of dollars in government and commercial contracts for a host of projects from missile and rocket systems to jet fighters. Smaller companies in the region often capture lucrative government subcontracts, along with other major contractors that have a Florida presence such as The Boeing Co. and Harris Corporation.

With so many crossover applications, the sector benefits from a region firmly designated as the national leader for modeling, simulation and training. Organizations in the region employ simulation technology in applications such as flight training for commercial and private pilots and air traffic management.

The sector enjoys strong support from public and private organizations that are dedicated to advancing the industry. Additionally, community educational institutions develop programs specifically geared toward enhancing the quality of the workforce available to aviation and aerospace businesses.



Agritechnology

“For our agritechnology company, there are a number of benefits to doing business in the Metro Orlando region—a host of similar businesses are clustered here; there is strong R&D taking place; nearby universities offer valuable support; and the climate and location are key. I would encourage any company to look closely at Metro Orlando when selecting a future location.”

— Mike Rink, owner
AG 3, Inc.

Metro Orlando is emerging as a prime location for the rapidly developing field of agritechnology, a segment of biotechnology that focuses on genetic engineering, cloning and high tech horticulture and agriculture. Key projects led by agritech companies based in the area include:

- Cloning hard-to-grow plants
- Extracting plant oils for medicinal and botanical purposes
- Developing alternative irrigation processes to conserve precious water and protect the environment
- Extracting liquid from vegetables for use in pharmaceuticals, nutraceuticals, food colors, flavors, and cosmetics

In turn, some of the world’s leading agritech companies are headquartered in Lake County, located northwest of Orlando. With long-standing roots in the agricultural industry, Lake County is now evolving to become a hub for the state’s agritech sector. Local agritech companies are collaborating with state and federal agencies and educational institutions on various research and development projects aimed at leveraging this emerging science to increase energy efficiency in growing operations and protecting the environment.

In Florida, the agricultural and natural resources industries, which comprise agritech-related sectors, generate \$35 billion in net sales and employ more than 336,000 people. Metro Orlando is the state’s largest region for this industry and is committed to helping build the agritech sector locally.

Cleantech & Sustainable Energy



“There is an aggressive and enabling atmosphere in the Metro Orlando area for high tech companies and new research, which make it an ideal locale for the energy and alternative fuels industry.”

— Dr. Robert Stonerock, Jr.
Clean Power Engineering Company

Metro Orlando has firmly established a traditional energy sector with the presence of such worldwide industry leaders as Siemens Power Generation, Inc. and Mitsubishi Power Systems, as well as leading utility companies and a host of related service and equipment companies. With this foundation in place, the sector is beginning to shift more focus on alternative fuel sources.

The region is steadily becoming a hotbed for renewable energy and alternative fuel endeavors as businesses and non-profit entities engage in a variety of research and development projects aimed at deploying more cost-efficient, environmentally-friendly power. With federal government urgency to reduce reliance on foreign oil, hydrogen technologies are a key area of research being conducted. NASA, the world’s chief end user of liquid hydrogen, and the federal Department of Energy, have awarded millions of dollars in grant money toward hydrogen research to the region.

State and local governments are committed to creating a diversified economy, which ensures ample supporting resources and incentives are available for high tech industry sectors in the region, including energy and alternative fuels. As a result, there is great potential in Metro Orlando for startup and existing businesses to flourish.



Digital Media & Entertainment Technologies

“There is an immense brain trust in Metro Orlando for the digital media industry that is hard to find anywhere else.”

— Bob Allen, CEO, IDEAS

The progressive digital media sector in Metro Orlando evolved from the convergence of several established fields in the region, including:

- Modeling, simulation and training (MS&T)
- Film & television production
- Theme park/ride and show
- Interactive & immersive entertainment

Today, the region is positioned in the heart of one of the top 12 clusters in the country for digital media. As new applications continue to emerge, the industry has kept pace in Metro Orlando. With a focus on content creation and enabling technologies, the digital media sector features:

- 1,200+ companies
- 30,000 creative specialists
- Annual revenue of an estimated \$9 billion (figure includes location-based entertainment)

Metro Orlando has the technical infrastructure, talented employee pool and educational resources necessary to further the growth of digital media in this region. Combined with strong community dedication to enhancing the sector, Metro Orlando is brimming with opportunity for both entrepreneurs and established businesses.

Film & Television Production

Well known as the world's premier tourist destination, Metro Orlando is also a leading destination for film, television and commercial production. State-of-the-art soundstages and unique venues have helped the region become one of the busiest production centers in the United States. Year-round filming capabilities, a highly-skilled local crew base, and supportive local communities have helped advance this region's reputation as one of the world's best.



With skilled crew, diverse locations, world-class studios, specialized service companies, the Metro Orlando region offers the very best to film and television producers. It is no wonder that, in the past 17 years, this region has grown from a \$2.5 million to an \$845.5 million annual production market. Today, more than 3,400 Metro Orlando employees are engaged in film and television production-related activities.

The EDC's Film, Television and Digital Media Production team—known worldwide as the Metro Orlando Film & Entertainment Commission—aggressively markets the region as a top production location. This team provides one-stop services, ranging from location scouting to stream-lined permitting.



Financial Services & Financial Technology

“The I-4 Corridor that runs through Greater Orlando is the mecca of the financial software industry – home to four of the big six software players, plus major financial services institutions and insurance companies. Combine that with a financial savvy and multi-language workforce and you get a location that’s a global hub for the industry.”

— Terry Vannoy, Co-Founder, Optria



The push for going green takes on new meaning in Metro Orlando, as the region has emerged as a national leader for the financial services and financial technology industry. Led by top industry players that have major divisions and operations based or housed in Orlando – such as Fiserv, Harland, FIS, The Bank of New York Mellon, Charles Schwab and Chase – this ‘most wired U.S. city’

employs over 50,000 financial services and financial technology workers. Perhaps even more noteworthy is the fact that Orlando is among the top metros in the nation when it comes to employment growth in this industry. From 2003 to 2007, Orlando’s financial service employment grew 13 percent, while FiTech employment grew 30 percent.

Dominating industry growth here are companies in the key segments of software development, banking and finance, investments and insurance. And companies such as Fiserv and The Bank of New York Mellon have expanded numerous times, bringing in sister companies and subsidiaries. Additionally, Florida is second only to New York in the number of FINRA securities licenses that are critical to companies such as The Bank of New York Mellon and Schwab.

The industry is bolstered overall by a world-class telecom infrastructure, a strong and ever-growing technology base (which includes more than 1,000 software and information technology businesses), and a swelling number of knowledge and multi-language workers coming from our community colleges and universities. In particular, the University of Central Florida, now the third largest university in the country, granting more than 800 economics, accounting and finance degrees annually and boasting top-ranked engineering and computer science programs.

Rounding out Metro Orlando’s competitive edge for the industry is its central location with global access – one that provides easy air access to nearly all major U.S. and international financial centers.

Manufacturing, Warehousing & Distribution

Metro Orlando’s central location in Florida positions it as a hub with exceptionally quick, easy access to air, land, water and space transportation routes. This distinctive geographical advantage makes the region an ideal location for general manufacturing, warehouse and distribution businesses.

A full range of manufacturers and warehouse/distributors are represented in Metro Orlando, supplied by a deep, diverse talent pool of experienced employees. Major corporations headquartered in the region include Mitsubishi Power Systems, Inc. and HD Supply. A proliferate number of mid-sized manufacturers and distributors further fuel the region’s economic engine.



As businesses in this sector continually explore ways to reduce transportation shipping costs, Orlando’s locale is increasingly recognized as a valuable asset. Orlando International Airport is within overnight trucking distance of many major U.S. cities, and has scheduled non-stop service to more U.S. airports than any other Florida airport.

Strategic partnerships between educational institutions and business also have a positive impact on the sector. Companies wishing to startup in, or relocate to, Metro Orlando can find a wealth of support and assistance in practically all aspects of their business.



Life Science & Biotechnology

"There may be no other place in the world like Orlando when it comes to life sciences, biotechnology and healthcare. Right now there is a tremendous convergence of opportunities due to our community's imagination and collaborative effort to bring forward a new 'medical city' clustered around the University of Central Florida's College of Medicine, world class medical research operations, and equally impressive healthcare providers concentrated on improving your quality of life. Florida's great agricultural heritage and an emerging energy sector combine to create Central Florida's 'bio' opportunity which is to feed, fuel and heal the world. As a top international destination, Orlando is a gateway to the world providing unparalleled connectivity in a global economy. We are proud to say we have called Orlando our home for more than one hundred years."

— Lars Houmann, FACHE
President & CEO, Florida Hospital

Metro Orlando is poised to become one of the most advanced industry clusters in the world for life science. In fact, the region is one of only two locations worldwide currently constructing an all-new 'medical city', a move serving to differentiate Central Florida as an industry and research leader.

Anchored by the University of Central Florida's College of Medicine and the Sanford-Burnham Medical Research Institute – a premier, non-profit medical research facility focused on advances in combating diabetes, obesity and cardiovascular disease – Orlando's Lake Nona Medical City consists of:

- University of Central Florida's Burnett School of Biomedical Sciences;
- M. D. Anderson - Orlando's Cancer Research Institute (CRI) ;
- Nemours Children's Hospital (2012);
- Orlando VA Medical Center (2012);
- Department of Veterans Affairs (VA) Hospital and Medical Simulation Center for Excellence; and
- University of Florida Research and Academic Center.

This region's emerging biotechnology and life science sector grew from a renowned regional healthcare system, comprising some of the top hospital systems in the country – including Florida Hospital and Orlando Health. The sector also spun off from a prominent agricultural base and the collaborative efforts of the region's established photonics and modeling & simulation sectors. Clinical trials of newly-developed medications are emerging as an important aspect of this sector as well.

Today, this Central Florida sector features:

- 150+ biotechnology and life science companies
- 9,248 workers
- Estimated \$2.6 billion in earnings

The biotechnology and life science sector is further augmented by several prestigious educational and research centers such as:

- University of Florida's Institute of Food and Agricultural Sciences (IFAS) and
- Central Florida Research Park, one of the country's top 10 research facilities.

Today, there is no limit to what we imagine possible. Wellness and personalized medicine are areas in which Metro Orlando is working to not only excel, but to differentiate this region as a leader – from the lab to the bedside.



Modeling, Simulation & Training

"Orlando and Central Florida are the epicenter for modeling and simulation. When you combine the power of the Research Park, close ties between a world class university, industry, and Team Orlando you produce a synergy found nowhere else in the world. Companies who want to be serious players in the modeling and simulation industry need to consider focusing their efforts on Orlando and Central Florida."

— Thomas L. Baptiste, Lt. General, USAF (Ret.)
President/Executive Director, National Center for Simulation



Metro Orlando's strong MS&T presence has earned the region the distinction of being designated a National Center of Excellence for Simulation and Training. The extensive resources and expertise available in Metro Orlando, through the convergence of prominent MS&T organizations, reinforce the region's position as an unmatched locale for new and expanding companies within the industry.

Metro Orlando has long been established as the nation's epicenter for modeling, simulation and training (MS&T) technology. The MS&T sector in Metro Orlando features:

- 150+ companies
- 12,500+ direct employment
- Gross Regional Product of \$3 billion+

As the largest MS&T cluster in the country, the region has evolved over the past 40 years from its roots in military training to provide applications in such diverse fields as:

- Aviation and aerospace
- Education
- Emergency services
- Entertainment
- Homeland security
- Information technologies
- Medical technologies
- Microelectronics
- Optics and photonics
- Transportation

Backing the MS&T industry in Metro Orlando are a number of renowned research, support and educational facilities, such as:

- National Center for Simulation
- University of Central Florida's Institute for Simulation and Training
- Embry Riddle Aeronautical University's aviation simulation programs

Optics & Photonics



"Photonics is growing its own sector, and also an enabling technology that is being utilized in and enhancing most other high tech sectors. As a result, Photonics will continue to see significant steady growth and have a major impact on products, processes, and savings in most industries"

— Dr. James Pearson, Special Consultant
CREOL, The College of Optics & Photonics, UCF

Since the early 1960s, Metro Orlando's optics and photonics industry has grown from a highly specialized military pursuit to a strong, diverse sector. Today, Metro Orlando is an internationally-recognized leader in this industry:

- Approximately 95 photonics companies
- 15,000+ workers
- Over \$2 billion in gross regional product

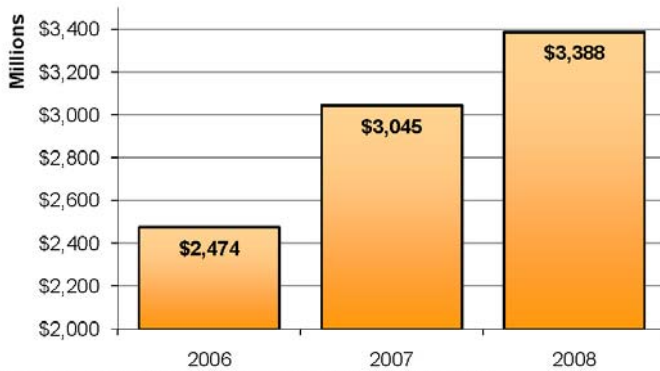
Source: Florida Photonics Cluster

These companies enjoy an environment fostering progress through collaboration with internationally recognized academic institutions, a highly skilled workforce and numerous community and government agencies dedicated to facilitating industry growth throughout Metro Orlando. The photonics industry in Metro Orlando is clearly poised to flourish well into the future.



Global Business

Metro Orlando Export Value



Source: U.S. Dept of Commerce, Office of Trade & Industry Information

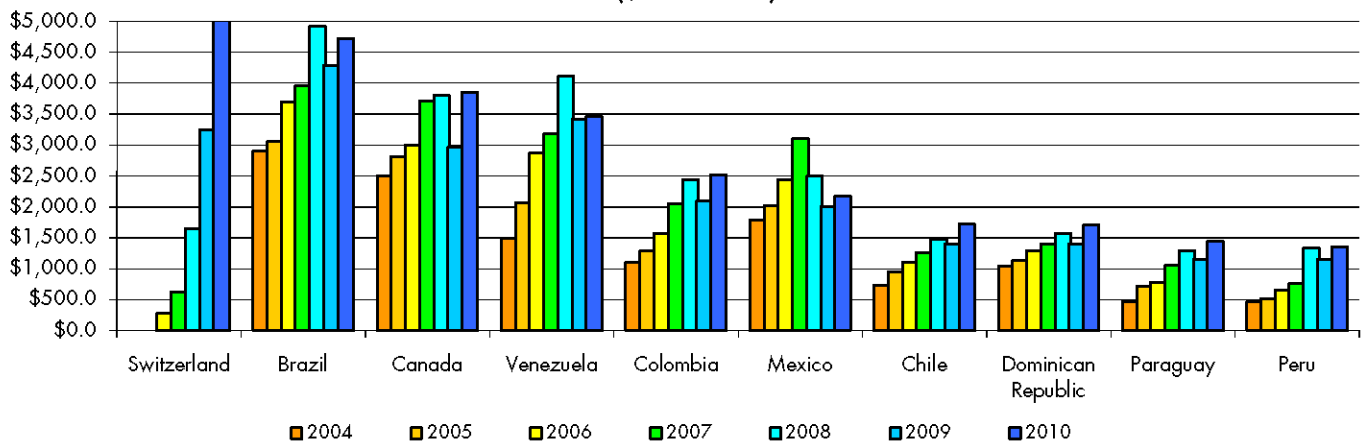
As the world's 19th largest economy, Florida's international sector continues to grow. One of Florida's top metro areas, Metro Orlando is at the top of that growth. In fact, Metro Orlando is one of the United States fastest growing business locations and is increasingly being considered as an expansion location for international companies. Recent expansions at our key transportation centers, Orlando International Airport and Port Canaveral, further connect our community with the rest of the world. And, a strong high tech industry with 53,000 employees puts the region at the forefront of innovation.

Exports continue to increase, making the region the third largest export market in Florida. Local

manufacturers exported over \$3 billion of goods in 2008. This reflects 11.3% growth over the prior year. Today, high tech products such as scientific instruments, medical equipment, microchips and telecom equipment, are some of the region's predominant export products. These exports are sent to countries all over Asia, Europe and Latin America.

Positioning Metro Orlando as a leader in the global economy is a priority of the EDC's International Business Development Team. Specifically, these efforts are designed to enhance international business in the region by directly assisting hundreds of local companies with their export sales strategies. The team also works to promote foreign direct investment in the region. These efforts include hosting international business development missions and inbound trade missions; helping local companies identify and capitalize on sales opportunities worldwide; and working with international companies on their business expansion plans.

Top 10 FL-Origin Export Destinations 2004-2010
(\$USD millions)



Source: U.S. Dept of Commerce, U.S. Census Bureau, Foreign Trade Division - State of Origin of Movement Series



Foreign Trade Zones

Foreign Trade Zones (FTZ) benefit both small businesses and *Fortune 500* companies by saving them millions of dollars on the assembling, manufacturing, processing, repackaging, cleaning, testing, sampling, relabeling, destroying, mixing, manipulating, salvaging and storing of both raw materials and finished goods.

There are two types of foreign trade zones: general-purpose and sub. General-purpose zones involve public facilities that can be used by more than one firm, and are most commonly located at ports or industrial parks used by small-to-medium sized businesses for warehousing/distribution and some processing/assembly. Subzones, however, are sponsored by general-purpose zones, but typically involve a single firm's site, which is used for more extensive manufacturing/processing or warehousing/distribution that cannot easily be accomplished in a general-purpose zone.

Businesses located within the zone can admit merchandise without a formal customs entry, payment of customs duties or government excise taxes. The ability to defer, reduce or even eliminate the payment of customs duties is a major business incentive to companies. Furthermore, when merchandise is exported to another country, it never enters the U.S. customs territory, and customs duties are not paid. If the merchandise is defective, damaged, scrapped, waste or obsolete, it can be re-exported or destroyed to eliminate duty.

Under the supervision of the U.S. Customs Service, there are three general-purpose zones that serve the Metro Orlando area, as well as several subzones.

Foreign Trade Zone #42

Established in 1979, FTZ #42 is located on 205 adjacent acres adjacent to the Orlando International Airport. The zone offers duty exemptions or deferments for companies receiving materials from foreign countries.

Foreign Trade Zone #136

Activated in 1989, FTZ #136 is the world's only quadramodal zone. Located within Port Canaveral and encompassing more than 4,000 acres, the zone is among the largest general purpose foreign trade zones in the country.



Foreign Trade Zone #250

Approved in 2001, FTZ #250 in Seminole County is the largest trade zone in the state. Its geographic boundaries encompass the Orlando Sanford International Airport (2,400 acres), the Port of Sanford, Sanford Central Park and various other parks and sites throughout the county. The FTZ offers duty and tariff exemptions on imported materials used in the manufacturing of products for export, thereby reducing overall manufacturing costs.



Business Tax Climate

Florida ranks 5th in the Tax Foundation's Business Tax Climate Index which measures the impact on business of five major elements of the tax system; the percentage of income taken by all taxes, the individual income tax rates, the corporate income taxes, the sales tax rate, and the complexity of the tax system.

Business Tax Climate Index Rankings 2011

State	Overall Rank	Corporate Tax Index Rank	Individual Income Tax Index Rank	Sales Tax Index Rank	Unemployment Insurance Tax Index Rank	Property Tax Index Rank
South Dakota	1	1	1	25	36	13
Alaska	2	26	1	5	31	12
Wyoming	3	1	1	13	28	46
Nevada	4	3	6	43	40	17
Florida	5	15	1	30	3	28
Montana	6	16	22	3	19	10
New Hampshire	7	50	10	1	38	35
Delaware	8	49	34	2	8	8
Utah	9	6	13	27	24	3
Indiana	10	21	11	20	12	4

Source: Tax Foundation

Florida's State / Local Tax Burden Among the Nation's Lowest

Over the past 14 years, Florida's tax burden is one of the nation's lowest tax burdens. Since 1994, the burden has fallen significantly as individual incomes have risen faster than state/local taxes collections. Estimated now at 8.8% of income, Florida's state/local tax burden percentage is ranked 45th nationally, well below the national average of 10.0%.

Florida Levies No Individual Income Tax

Florida is among six states in the country that collect no individual income taxes. Since most small businesses are either S Corporations, partnerships or sole proprietorships, they pay their business taxes at the rates for individuals. This makes the tax environment for small businesses in Florida very competitive compared to other states.

Florida's Corporate Income Tax System

Florida's corporate tax structure consists of a flat rate of 5.5% on all corporate income, which ranks 13th lowest among states that tax corporate income.

Florida Levies Sales Tax; Gasoline Tax among Lowest in the Nation

Florida levies a 6% general sales or use tax on consumers above the national median of 5%. In 2003, sales tax collections were \$879 per person (ranked 6th nationally). Florida's gasoline tax stands at 13.9 cents per gallon (ranked 48th nationally), while its cigarette tax stands at 33.9 cents per pack of twenty (ranked 31st nationally). Neither of these measures is indexed for inflation.



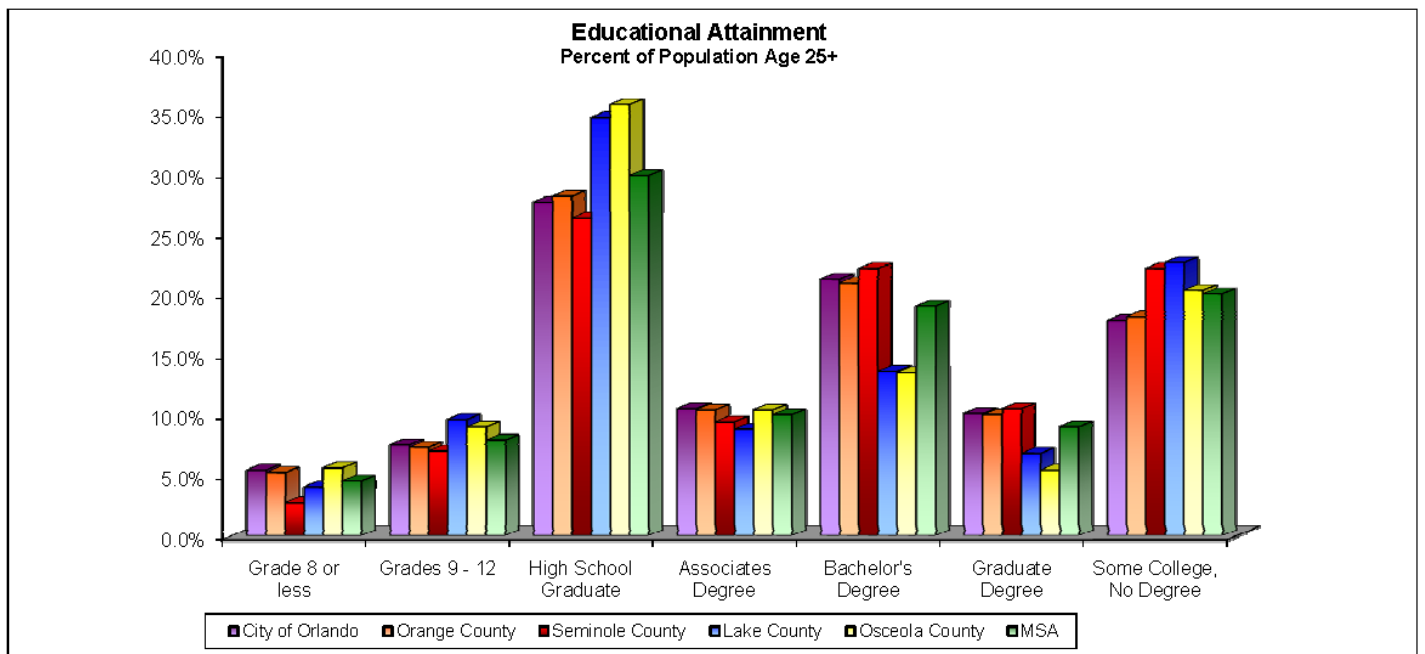
Education's tie with the region's business community is multi-faceted. From excellence in university research to innovation in public secondary education, students are prepared at all levels to serve as Metro Orlando's workforce of tomorrow.

Educational Attainment by County

Educational Attainment	City of Orlando	Orange County	Seminole County	Lake County	Osceola County	MSA
Grade 8 or less	7,707	36,988	7,692	9,419	10,250	63,930
Less than Grade 9 - 12	10,620	51,926	19,943	22,605	16,473	111,098
High School Graduate	39,255	199,879	74,929	81,471	65,345	421,745
Associates Degree	14,874	73,977	26,781	20,721	19,036	140,710
Bachelor's Degree	30,215	148,664	62,964	32,023	24,710	268,407
Graduate Degree	14,311	71,131	29,915	16,012	9,884	126,632
Some College, No Degree	25,242	128,748	62,964	53,215	37,157	282,198
Total Population Age 25+	142,224	711,313	284,903	235,466	183,038	1,414,720

Educational Attainment	City of Orlando	Orange County	Seminole County	Lake County	Osceola County	MSA
Grade 8 or less	5.4%	5.2%	2.7%	4.0%	5.6%	4.5%
Grades 9 - 12	7.5%	7.3%	7.0%	9.6%	9.0%	7.9%
High School Graduate	27.6%	28.1%	26.3%	34.6%	35.7%	29.8%
Associates Degree	10.5%	10.4%	9.4%	8.8%	10.4%	10.0%
Bachelor's Degree	21.2%	20.9%	22.1%	13.6%	13.5%	19.0%
Graduate Degree	10.1%	10.0%	10.5%	6.8%	5.4%	9.0%
Some College, No Degree	17.8%	18.1%	22.1%	22.6%	20.3%	20.0%

Source: Decision Data Resources, Spring 2010 Estimates - Updated February 2011





Universities & Colleges

The exceptional quality of technology research and training at Metro Orlando colleges and universities is increasingly recognized as an extraordinary community asset. Working in tandem, the University of Central Florida in Orlando, the University of South Florida in Tampa, and the University of Florida in Gainesville anchor Florida's High Tech Corridor, providing undergraduate, graduate and doctoral program options in specialties ranging from microelectronics to bio-med. In addition to the multitude of specialized high tech curriculums, graduate degrees in business administration and law are also available through local universities.

University of Central Florida (UCF)

With more than 56,000 students, including more than 1,250 students of international origin, UCF is the country's second largest university in the nation. Maybe even more important is the school's growing reputation as a top metropolitan research university, and its focus on meeting the needs of the local business community.

UCF's School of Electrical Engineering and Computer Science is home to a nationally and internationally-ranked Champion Programming Team, as well as the university's largest graduate research programs.

The university is also renowned for its unique cross-disciplinary approach to education, which combines the strengths of its colleges of business and engineering to build skills in both the "virtual" and "real" worlds.

Several additional hands-on UCF research and training facilities include:

- Institute for Simulation and Training (IST)
- Space Education and Research Center
- Florida Solar Energy Center
- BioMolecular Science Center
- Center for Research and Education in Optics and Lasers (CREOL)
- Materials Characterization Facility (MCF)
- Nanotechnology Research



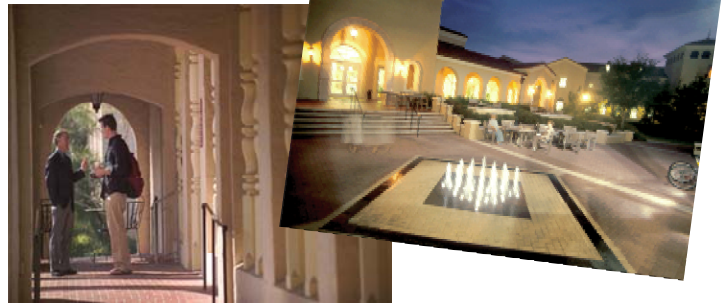
Central Florida Research Park

Adjacent to the University of Central Florida is the Central Florida Research Park, recognized as one of the top ten research parks in the world. This 1,000-acre corporate community provides an environment for industry and the university to share training facilities, pursue cooperative research and transfer existing technology to the marketplace.



[Rollins College](#)

Recognized as one of the nation's 50 "Best Value" private colleges and universities, according to *The Princeton Review*, Rollins is the top regional university in Florida, according to *US News & World Report's* annual rankings. The college's Roy E. Crummer Graduate School of Business is noted for excellence in graduate management education and lifelong learning programs. Rollins currently has an enrollment of nearly 4,000 students from more than 40 states and 30 nations.



[Valencia College \(VC\)](#)

Valencia is a publicly supported, comprehensive community college that continually identifies and addresses the changing learning needs of the communities it serves. The College provides Associate-degree programs that prepare learners to succeed in university studies, courses and services that provide learners with the right start in their college careers. As well as associate degree, certificate, and continuing professional education programs that prepare learners for entering and progressing in the workforce. They are known for their two-year parallel program that prepares students to transfer to an upper-division college or university; college-preparatory courses that provide students with assistance in basic skills; and technical programs, continuing education courses that prepare students to meet the needs of business and industry.

[Seminole State College of Florida \(SSC\)](#)

With four campuses, Seminole State College of Florida is one of the fastest-growing two-year colleges in the nation. To meet the ever-changing needs of its student body and business community, SSC offers a comprehensive range of programs, including associates degrees that prepare students for four-year universities; technical and vocational certificates; continuing education; and corporate training. The college offers 20 baccalaureate programs in conjunction with UCF and is the only community college in Florida to offer a four-year interior design degree.

SSC's four campuses are conveniently located at Sanford/Lake Mary, Oviedo, Altamonte Springs and Heathrow. SSC's Center for Economic Development at Heathrow houses Central Florida's economic development leaders and the college to train the region's work force in business/technology-related programs, and attract and retain leading technology companies to Central Florida.

[Lake-Sumter Community College \(LSCC\)](#)

During the last four decades, Lake-Sumter Community College has earned the reputation as one of the best two-year institutions in Florida. There are three convenient campuses: Leesburg, Clermont, and Sumterville. The LSCC mission statement says it best ..."Lake-Sumter Community College provides excellent student-centered academic and career-oriented education that is proactive, accessible, and responsive to our community's needs". With this goal in mind, LSCC will continue to provide a quality, personalized, economical, and flexible environment for Lake and Sumter County students.

[University of Florida's Institute of Food and Agricultural Sciences \(UF/IFAS\)](#)

UF/IFAS is a federal-state-county partnership dedicated to developing knowledge in agriculture, human and natural resources, and the life sciences, and enhancing and sustaining the quality of human life by making that information accessible. While extending into every community of the state, UF/IFAS has developed an international reputation for its accomplishments in teaching, research and extension. Because of this mission and the diversity of Florida's climate and agricultural commodities, Today, UF/IFAS includes extensions in each of the state's 67 counties, 14 research and education centers with a total of 19 locations throughout Florida.



[DeVry University](#)

Renowned for technology education, DeVry University Orlando offers a variety of degrees, including bachelor's programs in computer information systems, telecommunications management, electronics engineering, business information systems, and information technology. An associate's degree is offered in electronics and computer technology. Master's degrees are available through the Keller Graduate School of Management.

[Full Sail University](#)

Full Sail University is one of the nation's top schools for the entertainment, film, animation and digital media fields. Beginning with a few hundred students several years ago, the school now serves more than 4,000 who are honing their creative talents. Notably, students at the school have access to a sixty-studio multimedia complex and direct links to local professionals and cutting-edge equipment.

[University of Phoenix](#)

Organized to meet the unique needs of working professionals, the University of Phoenix Orlando campus offers bachelor's and master's degree programs in information technology, business administration/technology management, e-business and computer information systems. Certificate programs are also available in A+ computer service, Microsoft certified systems engineering and Network+.

[Ana G. Mendez Metro Orlando University](#)

Ana G. Mendez Metro Orlando University utilizes a dual language model in its strategy for education and is one of the first bilingual universities in the community. The university teaches classes in both English and Spanish in order to develop bilingual leaders of the future that will be able to thrive in a competitive global environment. Bachelor of Science and Bachelor of Arts degrees are offered as well as MBA degrees with specializations in accounting, finance, management, and human resources.

[Polytech University of Puerto Rico](#)

Founded in 1966, Polytech University of Puerto Rico (PUPR) is fully accredited and internationally recognized in the fields of engineering, architecture, computer sciences and business management and administration. The Orlando campus of PUPR provides opportunities in leadership, productivity, and awareness for students from diverse backgrounds. The university offers bachelor's degrees in Business Administration, Organizational Management, and Electrical, Civil, and Computer Engineering. They offer graduate programs in Business administration and Engineering management.

Central Florida Higher Education Alliance

Other higher education institutions with facilities in the region include:

- Barry University
- Belhaven College
- Columbia College
- Embry-Riddle Aeronautical University
- Florida A&M College of Law
- Florida Institute of Technology
- Florida Southern College
- Florida State University College of Medicine
- Keller Graduate School of Management
- National-Louis University
- NOVA Southeastern University
- Stetson University
- Troy State University
- University of South Florida
- Warner Southern College
- Webster University



K-12 Schools

Florida's growing public school system is leading the nation in prioritizing and raising student achievement. Through the Florida Comprehensive Assessment Test (FCAT), the state has implemented high standards for all public schools, and the payoff is evident here in Central Florida. Here are "the facts" about our region's four school districts.

Orange County Public Schools

- Serves a diverse population that includes urban (Orlando), suburban and even rural communities; 162 languages or dialects are spoken by students.
- By every measure, student achievement in this growing county compares very well to other large, urban districts, and to the surrounding suburban counties in Central Florida.
- Overall, in 2010, earned an "A" district grade from the state Department of Education. District grades are based on FCAT results of all students tested in the district.
- In 2010, a total of 135 schools (82%) were high-performers, earning "A" or "B" grades, based on FCAT results in reading, math, writing and science.
- The district's graduation rate has moved from 49.5% in 2000 to 79% in 2010.
- The number of students sitting for college credit exams is up more than 1,600 students from the previous year.
- Of the district's high schools, 13 made *Newsweek* magazine's 2010 "Top of the Class" list placing them among the top five percent of schools in the country based on breadth of rigorous academic programs.
- Total of 665 nationally certified teachers, the profession's highest credential.
- Overall, in 2010, Orange County Public Schools earned an A+ grade from Fitch Ratings reflecting the sound financial management and reserve levels.



Seminole County Public Schools

- Rated among the best in the state of Florida and among the top 100 school districts nationwide.
- Consistently recognized as an "A" Florida school district, with 98% of all schools awarded either an "A" or "B" rating in 2010.
- All four-year high schools are included in *Newsweek's* "Top High School List", which ranks schools in the top 3% of the nation based on AP/IB participation.
- In 2010, the graduation rate was 93%, ranking #4 in the state.
- For the past 30 years, SAT scores have consistently exceeded state and national averages.
- Almost 11,000 Advanced Placement (AP) exams were administered.
- Over 47% of teachers have a doctorate, specialist or master's degree, exceeding the national average.
- Spent more than \$454 million on renovation of existing, and construction of new, schools in the past ten years and more than \$42 million on technology for the schools and classrooms in the past five years.
- Over 24,500 volunteers donated 484,000 hours to 61 schools serving students from kindergarten through high school. This represents over \$9.4 million worth of services donated to our schools by the community.
- Named an "Academically High-Performing School District" in the 2007-2008 school year, one of only ten school districts so named by the Florida Department of Education.
- Recipient of the 2008 Seminole County Regional Chamber of Commerce Lifetime Achievement Award.



Lake County Public Schools

- Serves a student population totaling 41,010. Although it may be the smallest in terms of student population in the four counties, its success has been repeated time and again.
- The dropout rate decreased from 3.1% to 2.9% with a decrease of 1.6% over the past 3 years.
- Almost 86% received a grade of "A" or "B" based on the state's A+ grading system.
- Of the 3,391 students who took the third grade FCAT, 85% met the state-required performance standards for promotion.
- The number of Advanced Placement (AP) tests taken by students increased by 64% with a 22% increase in scores from 3 to 5.
- Over 37% of the teachers have a doctorate, specialist or master's degree.
- Notably, the graduation rate increased from 79% to 80%. This increase along with increases over the past 3 years totals a nearly 8% increase.
- The District opened a new elementary school, Sorrento Elementary School, as well as a new facility for Gray Middle School which were both entirely funded by Classroom for Kids and COPS money totaling a \$13,395,153 cost savings.
- Lake County Schools received the Certificate of Achievement for Excellence in Financial Reporting for 7 consecutive years from the Government Finance Officers Association (GFOA) coupled with an "A" rating from Standards and Poors.

Osceola County Public Schools

- Awarded the District Accreditation of Colleges and Schools (SACS).
- Rated a "B" based on reading and math FCAT scores.
- Notably, graduation rates increased at all high schools with a 4.3% increase to 83.5%. The dropout rate at 1.4% is below the state average.
- The Osceola County Schools for the Arts was named one of America's Top Public High Schools by *Newsweek* magazine for the second year in a row.
- Named a "Super System for Quality Schools" by the *Southern Association of Colleges and Schools*. This rating indicates that all eligible elementary, middle and secondary schools earned accreditation status.
- 26 schools designated as Five Star Schools earning the Florida Department of Education's most prestigious award for community involvement. This is the largest number of Osceola County Schools ever to earn the award.

Technology Magnet Programs

Throughout Metro Orlando, magnet programs have been established within high schools to provide opportunities for students to engage in intensive study in specific areas. These programs allow students at an early age to explore careers and to develop skills in broad disciplines including engineering, science, and technology, as well as in specializations such as microelectronics engineering, simulation applications, aviation and aerospace engineering and global information and future technologies.

Acceptance is required to the magnet programs, which attract top students from throughout the school districts. In fact, the popularity of the magnet concept has led to development of prototype programs as early as the elementary school level.

Academies of Information Technology

To address the national need for increased emphasis on integrating technology into K-12 curriculum, the National Academy Foundation has established a rigorous network of Academy of Information Technology (AoIT) programs in our nation's high schools. In Orange County, the AoITs operate as schools-within-schools and are at the following high schools: Apopka, Boone, Colonial, Cypress Creek, Timber Creek, University and Winter Park. Seminole County runs its single AoIT, Crooms Academy of Information Technology, as a magnet school for the entire district.

Local school boards work closely with the National Academy Foundation to ensure that curriculums address the needs of our region's local tech companies and that access to the program is available to qualified students from throughout the district.



One significant factor that sets Metro Orlando apart is its remarkable quality of life. Those who venture into Orlando beyond our world-famous tourist attractions quickly realize that this is a uniquely “livable” community. Distinctive, brick streets and tree lined neighborhoods; year-round outdoor recreation; proximity to beaches, lakes, springs, parks and trails; world-class entertainment options; professional sports; cultural events; closets free of winter coats, scarves and gloves ... all contribute to an environment that most never want to leave once they’ve called it home. In fact, companies of all types and sizes find that that our unparalleled quality of life enhances employee recruitment and retention.

Metro Orlando stacks up well against competing business locations. A trio of state-of-the-art performing arts and sports centers are planned for the region. And for those that prefer to get-away from the city pace, residential acreage remains abundant, offering quiet space with proximity to the urban center.

Cost of Living

National Cost of Living Index Comparison 1st Quarter 2011

Location	Population Rank*	Population*	Composite Index	Grocery	Housing
New York, NY (Manhattan)	1	18,897,109	218.4	154.8	397.9
San Francisco, CA	11	4,335,391	163.6	113.1	279.6
Washington, DC	7	5,582,170	141.0	110.7	231.0
San Diego, CA	17	3,095,313	130.8	104.7	189.2
Seattle, WA	15	3,439,809	120.0	111.9	134.4
Miami, FL	7	5,547,051	107.7	109.6	112.8
Denver, CO	21	2,543,482	106.4	103.5	112.5
Richmond, VA	44	1,258,251	102.6	108.1	101.1
U.S. Index Average	N/A	N/A	100.0	100.0	100.0
Orlando, FL	27	2,134,411	97.2	99.1	79.6
Atlanta, GA	9	5,268,860	95.2	96.4	91.0
Raleigh, NC	49	1,130,490	95.1	99.6	82.2
Austin, TX	36	1,716,289	93.4	83.6	79.2

Source: C2ER The Council for Community and Economic Research (Formerly ACCRA)

* 2010 Population Estimate, Census, Most recent data available



Climate



Temperature

The average high temperature (Fahrenheit) in Metro Orlando in 2010 was 80.1 degrees. The season's peak occurred in June at 93.3 degrees, and the low was 39.2 degrees during the month of December.

Precipitation

The average total rainfall in Metro Orlando in 2010 was 3.81 inches. The season's peak occurred in March with 8.87 inches, with no rainfall during the month of October.

Humidity

The average normal humidity in Metro Orlando in 2010 was 76%. The season's highest occurred at 80% during the months of August and September, and the low was 69% in April.

Healthcare

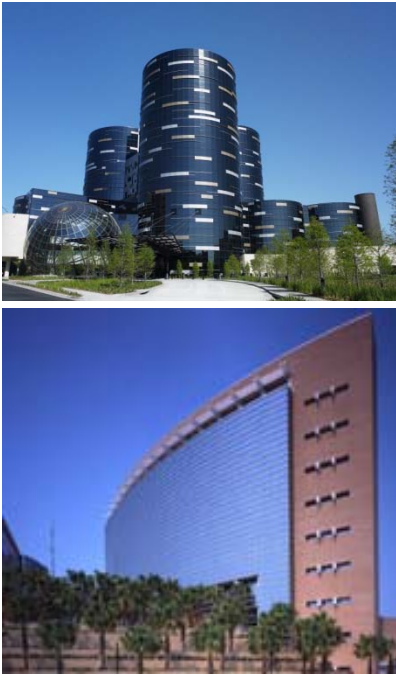
Healthcare in the region is comprehensive, with internationally recognized programs in cardiology, cancer, women's medicine, neurology, diabetes, orthopedics and rehabilitation. According to the American Hospital Association, two of the nation's largest healthcare systems, highlighted below, are headquartered in the region. The region is also building one of only two new medical cities in the world.

Florida Hospital

Florida Hospital is an acute-care healthcare system with more than 2,800 beds in a comprehensive network of 17 hospitals and 15 Centra Care walk-in urgent care centers. Owned and operated by Adventist Health System, Florida Hospital is the second busiest system in the country and treats more than one million patients each year.

Florida Hospital offers a wide range of health services for the entire family, including nationally and internationally recognized programs in cardiology, cancer, women's medicine, neurology, diabetes, orthopedics and rehabilitation. For the past several years, *U.S. News & World Report* has recognized Florida Hospital as one of "America's Best Hospitals". In addition, because Florida Hospital performs more complex cardiac cases than any other facility in the country, *MSNBC* selected Florida Hospital as the premier focus of their hour long special—"Heart Hospital." Florida Hospital also operates Florida Flight 1, their emergency air-medical transport service.





Orlando Health

Orlando Health is a 1,780-bed, private, not-for-profit healthcare network. Established in 1918 on the heels of World War I, and in the midst of the Spanish Flu epidemic that raged across the world, the system today cares for more than two million local patients and 4,500 international patients each year.

Orlando Health's locations in Metro Orlando include Arnold Palmer Hospital for Children, Winnie Palmer Hospital for Women & Babies and the world-class M. D. Anderson Cancer Center Orlando. The system is also home to Metro Orlando's only Level I Trauma Center, which serves a 22-county region and is equipped to handle the most serious emergencies, and the region's only Level III Neonatal Intensive Care Unit, designed to treat infants with serious conditions. ORH established the Arnold Palmer Hospital Children's Heart Institute, bringing leading pediatric cardiology subspecialists together to repair heart defects in the smallest patients. *Fortune* magazine has recognized Orlando Health as one of the Top 100 Companies to Work for in America.

- Teaching hospital with seven residency programs
- Arnold Palmer Hospital for Children and Women ranked "Top 5" in U.S.
- M.D. Anderson Cancer Center ranked "Top 2" in U.S.

Orlando VA Medical Center

Scheduled to open in 2012 in the Lake Nona Medical City, the Orlando VA Medical Center will be a 134-bed hospital that will bring the latest research and state-of-the-art medicine to 400,000 Central Florida veterans. This facility, the first VA hospital built in the United States since 1995, will pioneer cutting-edge technology in prosthetic limbs and bionic technologies for arms, legs, and eyes. The Medical Center will also specialize in brain injury treatment, post traumatic stress disorder research and treatments in suicide prevention.



In addition, the site has been selected as the national site for the Department of Veterans Affairs Medical Simulation Center. The center will be the nationwide training and planning home for the VA's new medical simulation system – Simulated Learning Enhancement and Advanced Research Network (SimLEARN). A 35,000-square-foot facility, to be called the SimLEARN National Center, will bring physicians and other medical professionals from throughout the country to train in the latest medical simulation technology, including surgical robotics.

Nemours Children's Hospital and Pediatric Health Campus

Nemours Children's Hospital and Pediatric Health Campus is also under construction in Orlando's fast-emerging Lake Nona Medical City. The 620,000-square-foot facility will include 95 beds, an 18-bay emergency department, a neonatal intensive care unit and departments specializing in complex childhood diseases. Scheduled to open in 2012, the hospital will be the central hub of a 60-acre pediatric health campus featuring a children's clinic, emergency department, diagnostic and ambulatory programs, education centers and research programs. The Nemours Children's Hospital is expected to pump \$400 million into the Central Florida economy and eventually create 2,600 new jobs.





Arts & Culture

Orlando's arts community can best be described as "small, strong and growing." The aggregate budget of all arts organizations is \$25 million annually. The quality of what our community receives for this investment is extraordinarily high.

- The artistic director of the Orlando Ballet, Robert Hill, is internationally renowned in ballet circles.
- Orlando is home to one of the top orchestras in the state.
- The Morse Museum is internationally known for its Tiffany Glass collection.
- The City of Orlando's Public Arts division curates three galleries, all of which are free to the general public. Two of the galleries are located in Orlando's City Hall; the third is housed within the historic Harry P. Leu Gardens Garden Home.
- The Florida Film Festival in Orlando has been ranked among the top 10 festivals in the world by *The Ultimate Film Festival Survival Guide, 2nd Edition*.
- The Zora Neale Hurston Festival is an internationally known celebration of the cultural contributions that Africa-descended people have made to the United States and to world culture.
- The Orlando Museum of Art boasts a renowned permanent collection and has played host to many world-famous traveling exhibits, including American glass artist Dale Chihuly, China's Ming Dynasty Collection, and American folk painter Grandma Moses.
- Adding to the rich community fabric of Orlando cultural arts is the Orlando Broadway Series, Orlando Shakespeare Theater in Partnership with UCF and the Festival of Orchestras.
- The Orlando Fringe Festival is a well-known, off-beat cultural event.
- Home to exciting, hands-on exhibits, amazing giant-screen movies and engaging live programming, Orlando Science Center is a place where visitors can explore and discover science and technology together.





Sports & Recreation

The region's mild climate makes outdoor recreational pursuits a year round lifestyle choice in Metro Orlando. This is one reason that more professional golfers live here than in any other city in the United States, including legend Arnold Palmer and superstar Tiger Woods.

But, there are plenty of sports and recreation options for amateur sports enthusiasts and spectators as well. Highlights include the following:

- The region is home to more than 100 top-rated golf courses, which are available for play 365 days a year. The annual [Arnold Palmer Invitational](#), [Tavistock Cup](#) and the [Children's Miracle Network Classic](#) are just a few of the major tournaments that attract top players to Central Florida.
- The NBA's [Orlando Magic](#) play on their home court in the [Amway Center](#) in downtown Orlando, as do the AFL's [Orlando Predators](#). Before the new Amway Center opened, the Orlando Magic's corporate home was based at Orlando's [RDV Sportsplex](#), a sprawling sports and entertainment destination that houses a fitness club, ice skating rink, tennis courts, salon and spa, retail and restaurants, corporate event facilities. The Sportsplex is adjacent to a Florida Hospital therapy and medical complex.
- The region's park network is extensive and well maintained, providing space for activities ranging from youth to adult recreational sports programs to corporate picnics and family reunions. A growing number of hiking and bike trails also dot the region; providing safe, traffic-free expanses for weekend exercise as well as for athletes in training.
- [Orlando Speedworld](#) is Central Florida's most active stock car racing speedway. And, nearby Daytona Beach is home to the world-famous NASCAR and Daytona 500, as well as to the annual Bike Week gathering of motorcycle enthusiasts.
- The Atlanta Braves, of MLB fame, host their spring training at the state-of-the-art [Disney Wide World of Sports Complex](#). That unparalleled sports mecca is also home to hundreds of other annual sports competitions, ranging from youth lacrosse to professional fastpitch softball and the annual Disney Marathon.
- Orlando's [Florida Citrus Bowl](#) is the only facility in the world that plays host to back-to-back NCAA Bowl games: the [Champs Sports Bowl](#) in December and the [Capital One Bowl](#) on New Year's Day. The [Florida Classic](#), our state's premier black college football game, is also played there.
- Lake County is home to the [National Training Center](#), a facility where local residents, national and international athletes of all levels gather to train and build strength. The USA Triathlon Team and United Kingdom Olympic Track Team are among those who have taken advantage of this stellar resource.
- From the [Silver Spurs Rodeo](#) in Osceola County and indoor sky diving on Orlando's International Drive, to scuba diving in the [Wekiva Springs](#) in Seminole County, to "[blueway](#)" [waterway trails](#) on the lakes of Lake County, there is something for everyone to be found in Metro Orlando!





About Us



The Metro Orlando Economic Development Commission (EDC) is an organization dedicated to meeting the needs of today's industries and creating a competitive economic climate where businesses can thrive. To meet this goal, the EDC provides key services and support, which range from relocation and expansion expertise to export counsel to long-term planning with our community partners.

Our charge is basically two-fold. To attract new business investment, we market the Orlando region worldwide as a top location for business. In addition, we work with local companies to assist them with expansion plans and other business concerns.

The EDC is also home to the Metro Orlando Film & Entertainment Commission, which markets the region as a top production location and to bioOrlando, a council that works to accelerate growth of the life science and biotech industry in Central Florida.

With the support of our community partners, the EDC, since its start in 1977, has successfully assisted thousands of companies relocate, expand and grow in Metro Orlando. This has led to the creation of more than 164,000 jobs; over \$8.85 billion in capital investment; and almost 77 million square feet of office and industrial space leased or constructed. More than 2,000 film and television production projects have been filmed here during the past 10 years.

A not-for-profit, private/public partnership, the EDC serves Orange, Seminole, Lake and Osceola counties and the City of Orlando, and has been recognized among the top economic development groups in the world.



VISION

To champion a more prosperous and diverse economy.

MISSION

To aggressively attract, retain and grow jobs for the Metro Orlando region.

RESULTS

Since 1977, EDC efforts have directly resulted in over \$8.85 billion in capital investment; more than 164,000 jobs created; almost 77 million square feet of office and industrial space leased or constructed; and more than 2,000 film and television production projects.



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