



ORLANDO
ECONOMIC
PARTNERSHIP

Will Transportation and Infrastructure Keep Up with Growth

Jim Hartmann, Alliance for Regional Transportation

Launch to Tomorrow

The Orlando Region's Mission to
Advance Broad-based Prosperity



ORLANDO
ECONOMIC
PARTNERSHIP



A Bold Vision for the Future to Advance Broad-based Prosperity



Strengthen Orlando's Economy

Create Targeted Jobs
and Investment

Foster Our Entrepreneurial
Ecosystem

Support Business Growth

Enhance Talent Pipeline



Amplify Orlando's Story

Change Perceptions

Tell Our Story

Advance Orlando as a
Future-ready Region



Champion Regional Priorities

Transformative Economic
Projects Like BRIDG

Policies to Foster an
Innovation Economy

Champion Multi-modal
Transportation



Empower Community Leaders

Establish Foundation for
Orlando's Future

Research, Context and Insight

Use Strategic Foresight to
Keep Region on the Cutting
Edge



Build a Brilliant Region

Enhance Autonomous
Connections

Leverage Technology
for Wellness

Build a 21st Century
Talent Ecosystem



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Empower Community Leaders

Educating and empowering community leaders through

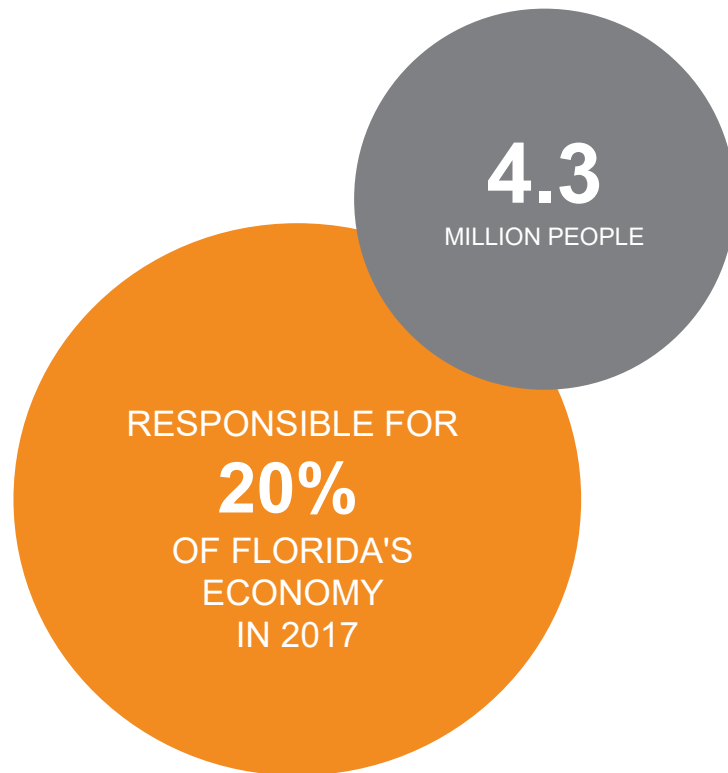
- Analytical insight
- Strategic foresight
- Leadership development

Inform and drive the region's pursuit of quality job creation,
economic growth and broad-based prosperity

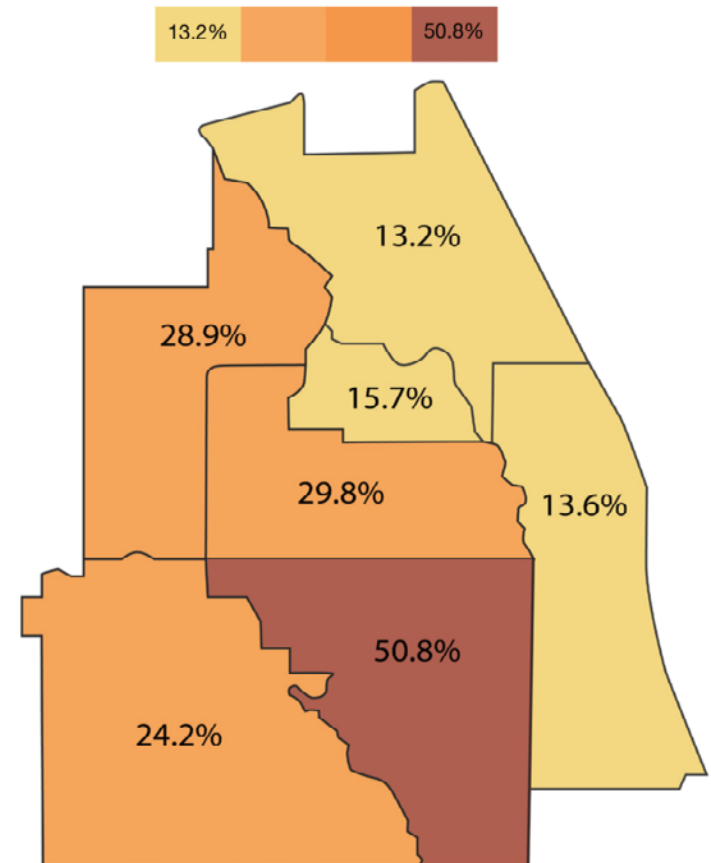




About the Region



County Population Growth (2017-30)



Growth



Adaptability



Deliberate Choices



Growth

1,500

PEOPLE PER WEEK
ADDED TO THE
POPULATION

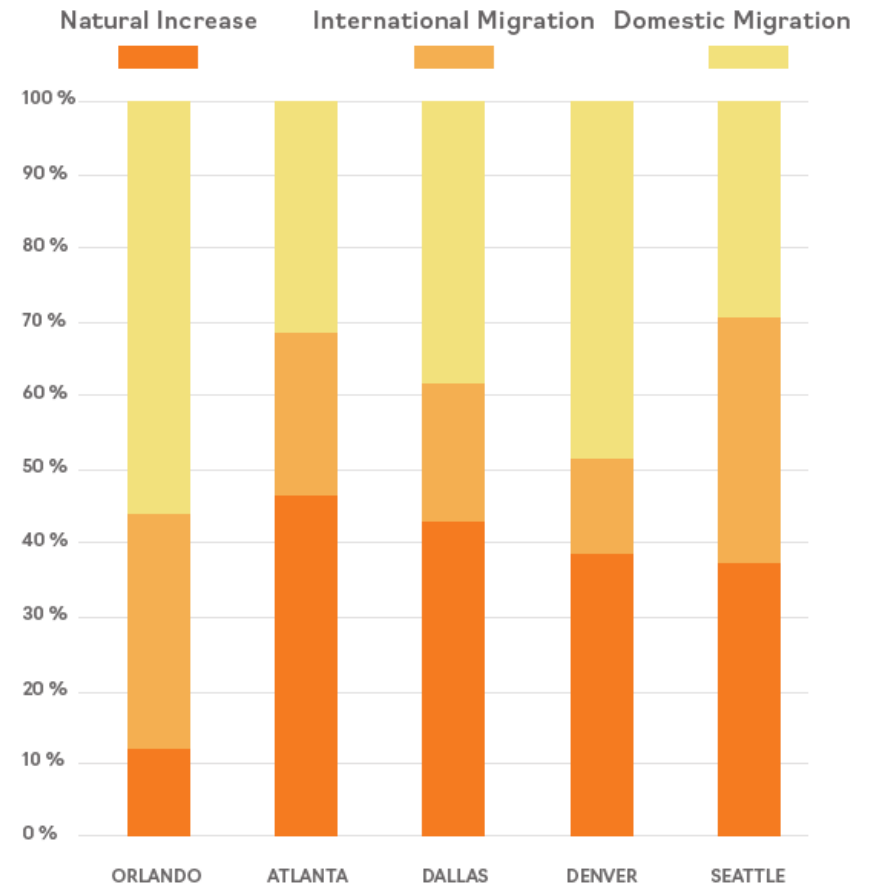
5.2 Million

PEOPLE LIVING IN THE
REGION BY 2030



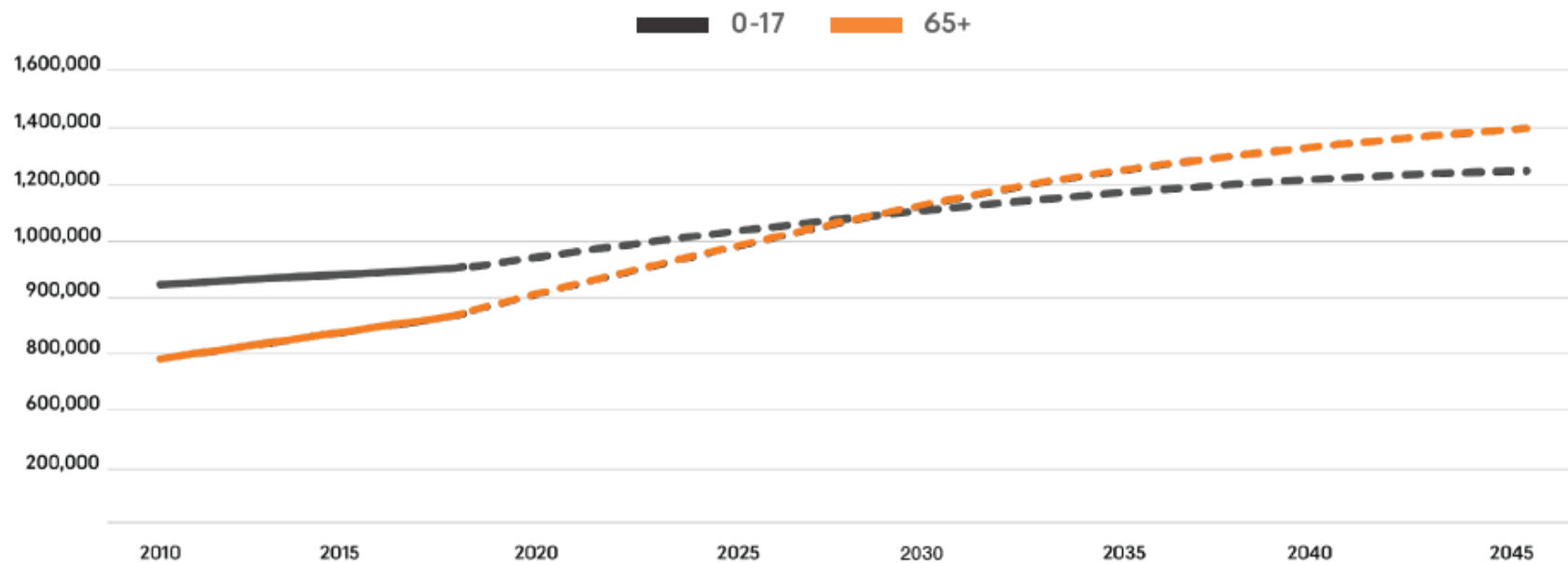
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Components of Population Change (2010-17)



Growth

Seniors Will Outnumber Children For the First Time in History



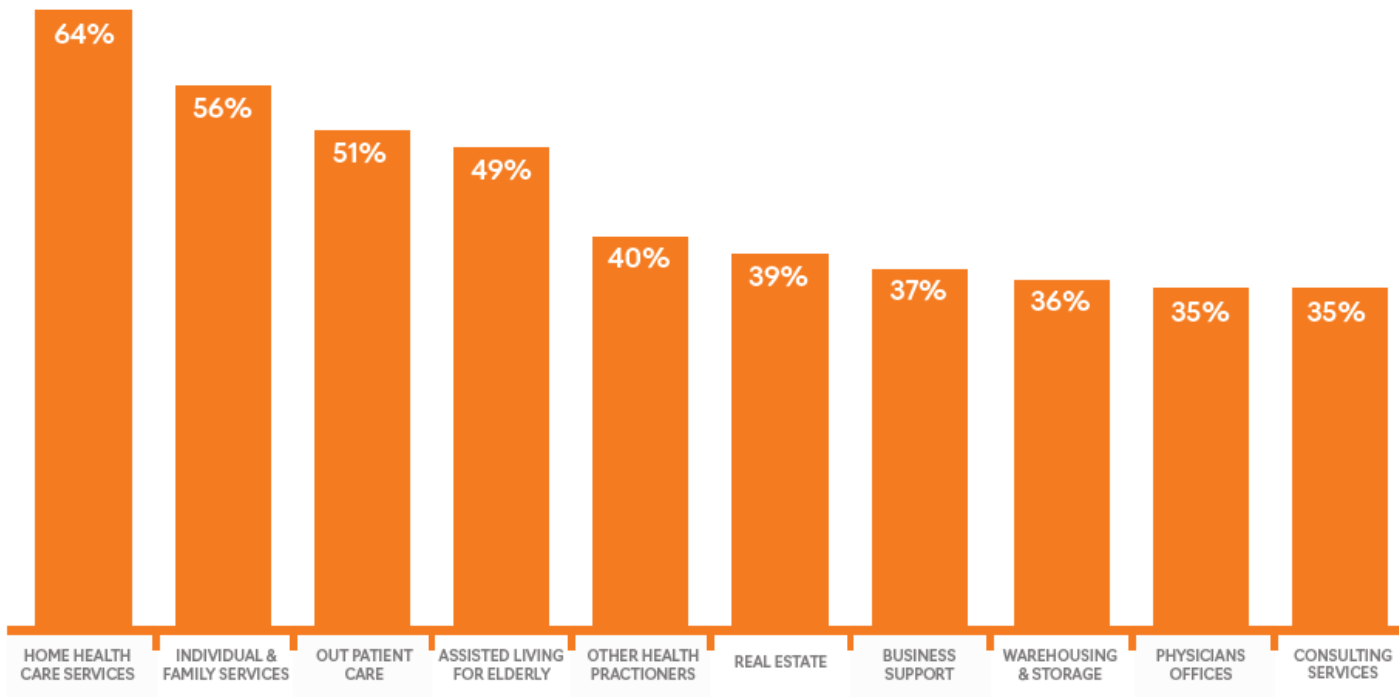
Source: University of Florida, Bureau of Economic and Business Research



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Growth

Fastest Growing Industries in Orlando* (2018-30)



**HOME AND
HEALTH CARE
SERVICES**
WILL BE ORLANDO'S
FASTEST GROWING
INDUSTRY



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Growth



Adaptability



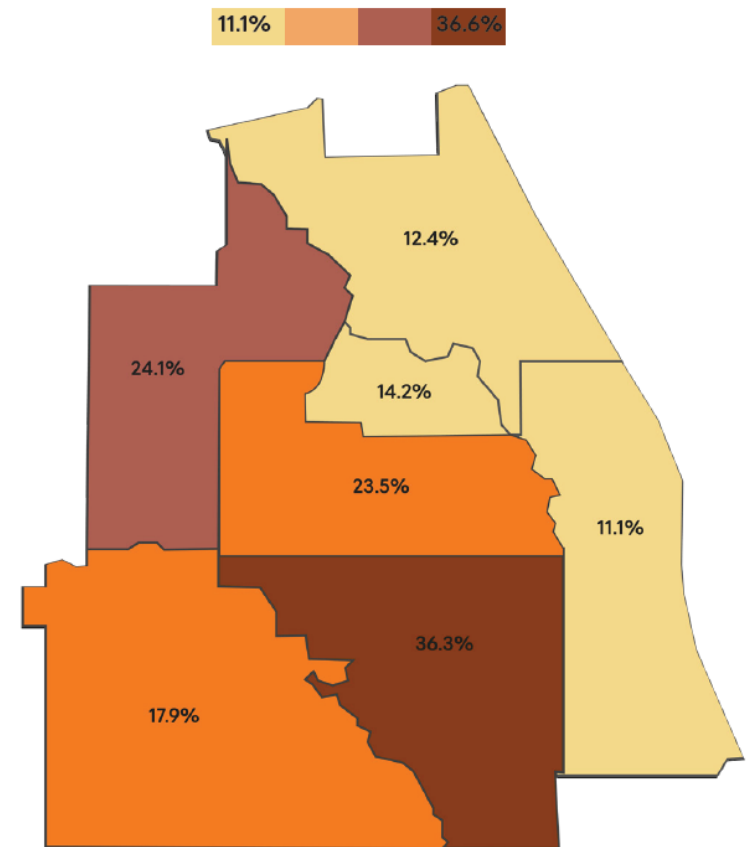
Deliberate Choices



Adaptability

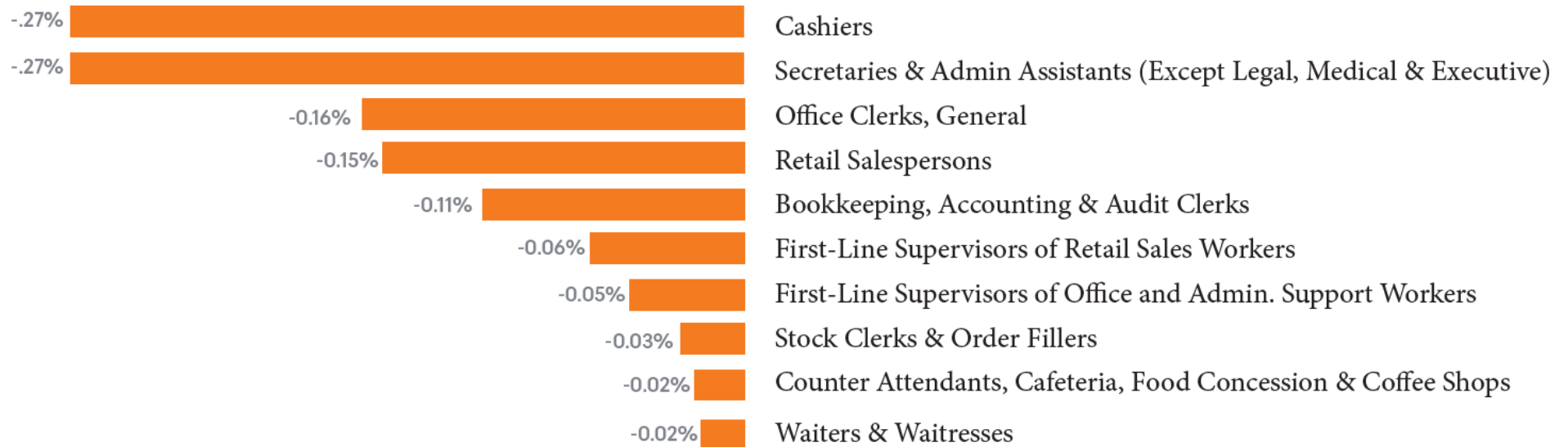


Projected Employment Growth (2018-30)



Adaptability

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



Growth



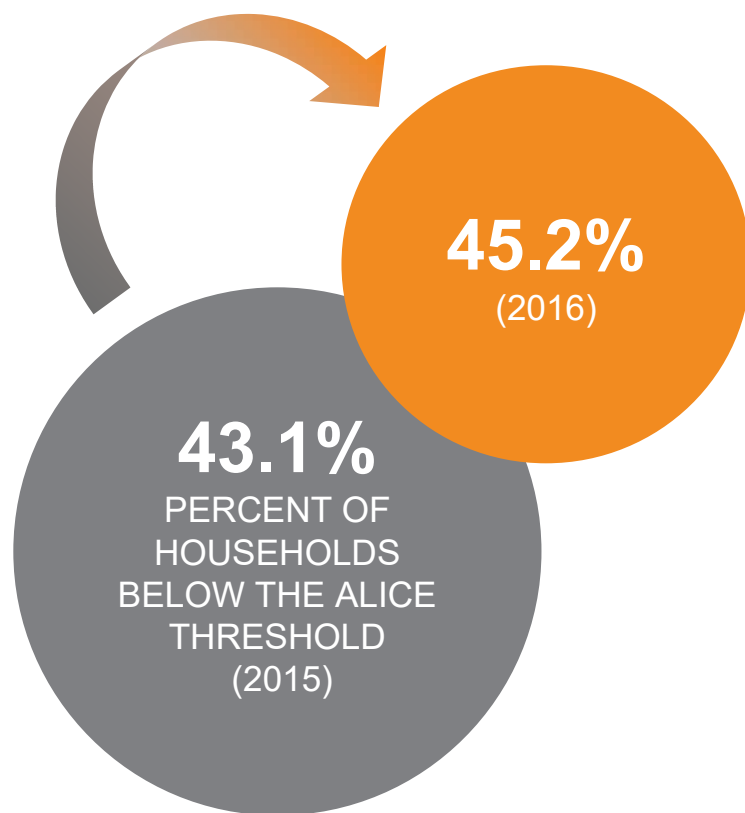
Adaptability



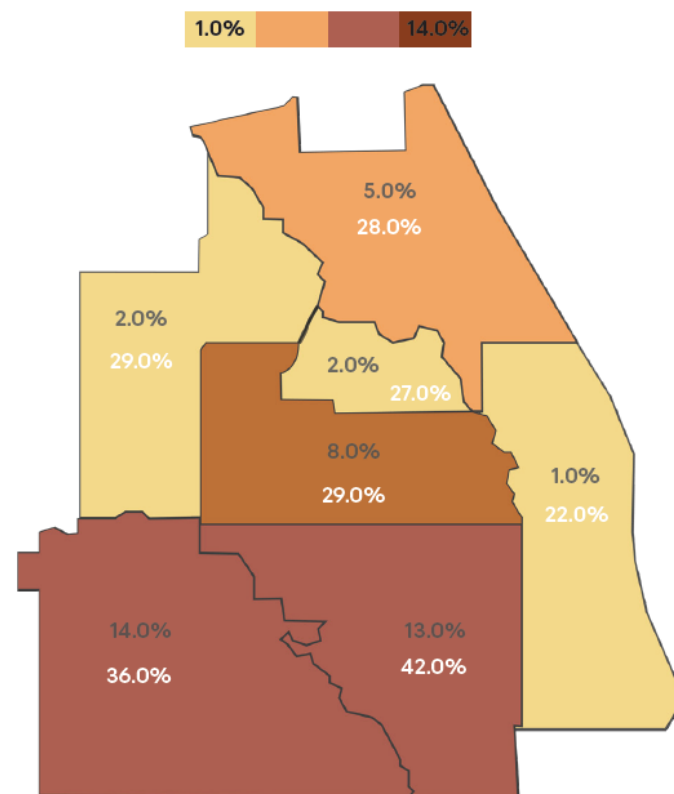
Deliberate Choices



Deliberate Choices



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

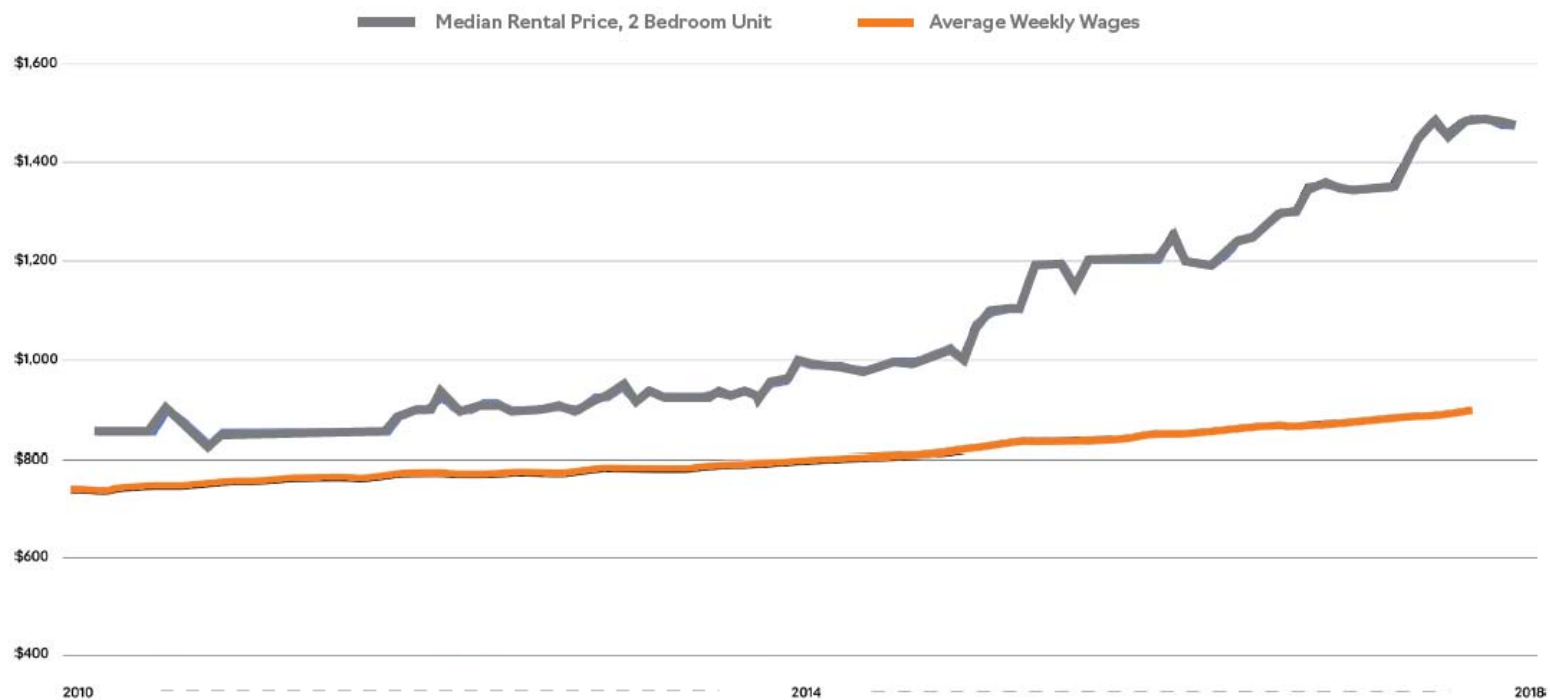


*White numbers correspond to the percentage of total A.L.I.C.E. households in each county.
Source: United Way of Florida, A.L.I.C.E. Study of Financial Hardship, 2017 Update



Deliberate Choices

Rent vs. Wage Growth, Orlando MSA

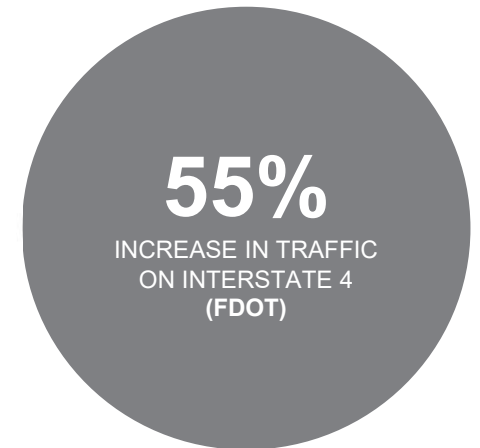


Deliberate Choices

Accumulated Teacher Supply Gap



Adaptability

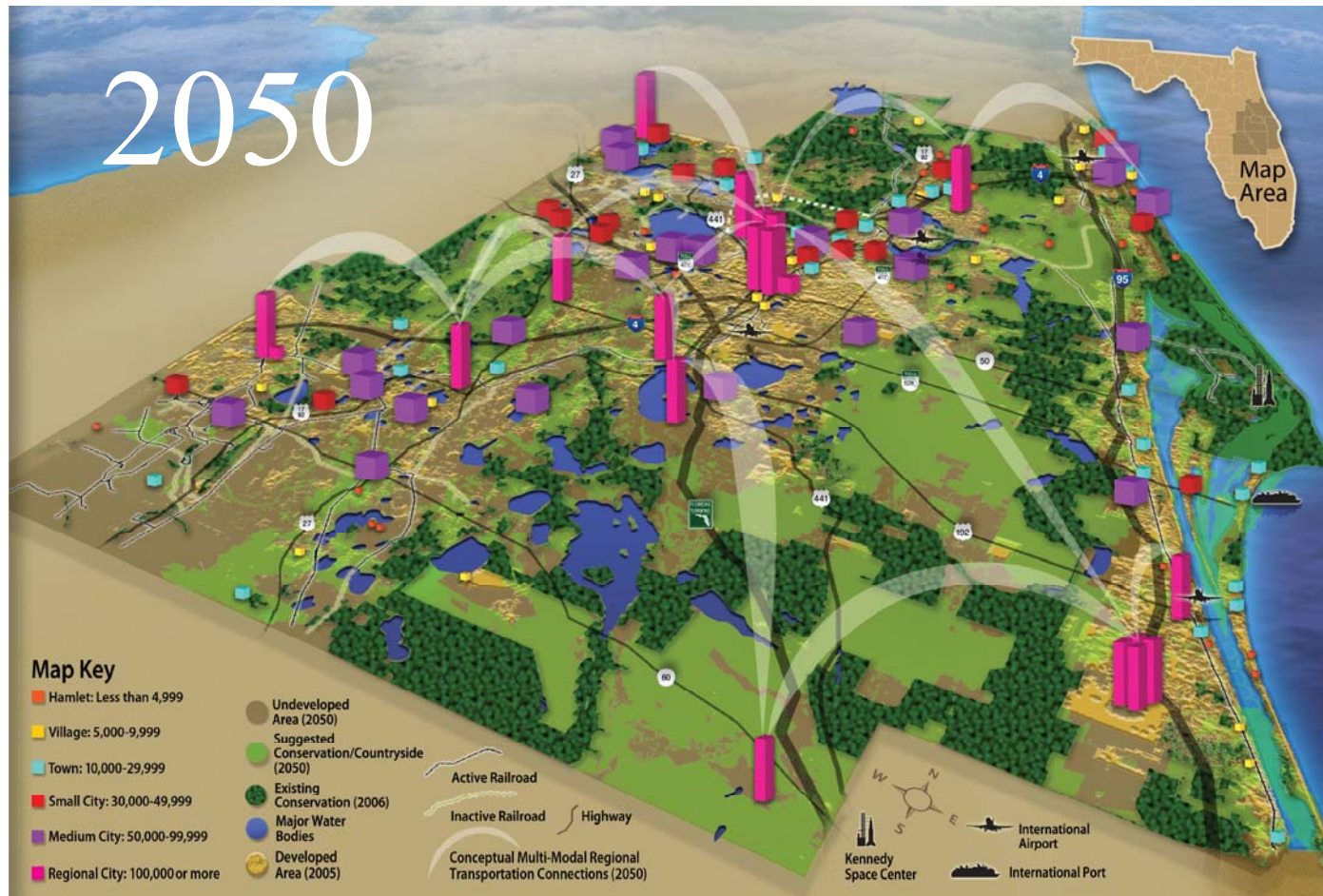


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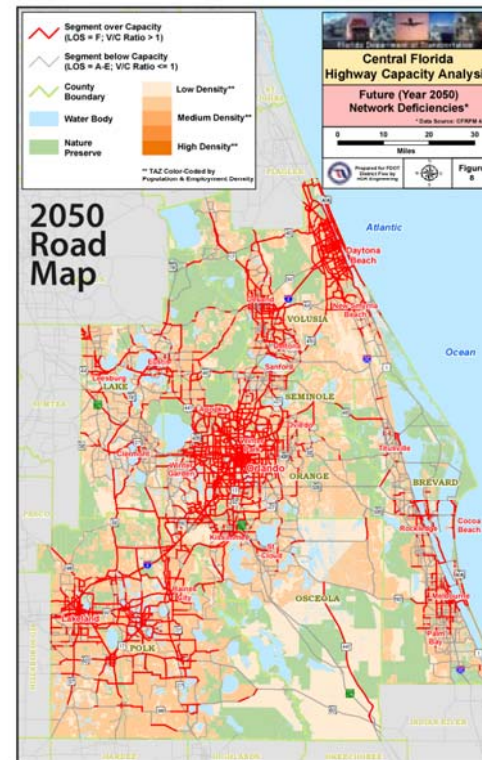
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HOW SHALL WE GROW?



How We Will Go As We Grow?

Continued reliance on the automobile is resulting in a growing strain on the road network. The map on the left shows in red the roads currently failing (Level of Service "F"). The map on the right shows the roads that are projected to fail by year 2050 based on population projections and projected future road projects.



Source: Florida Department of Transportation

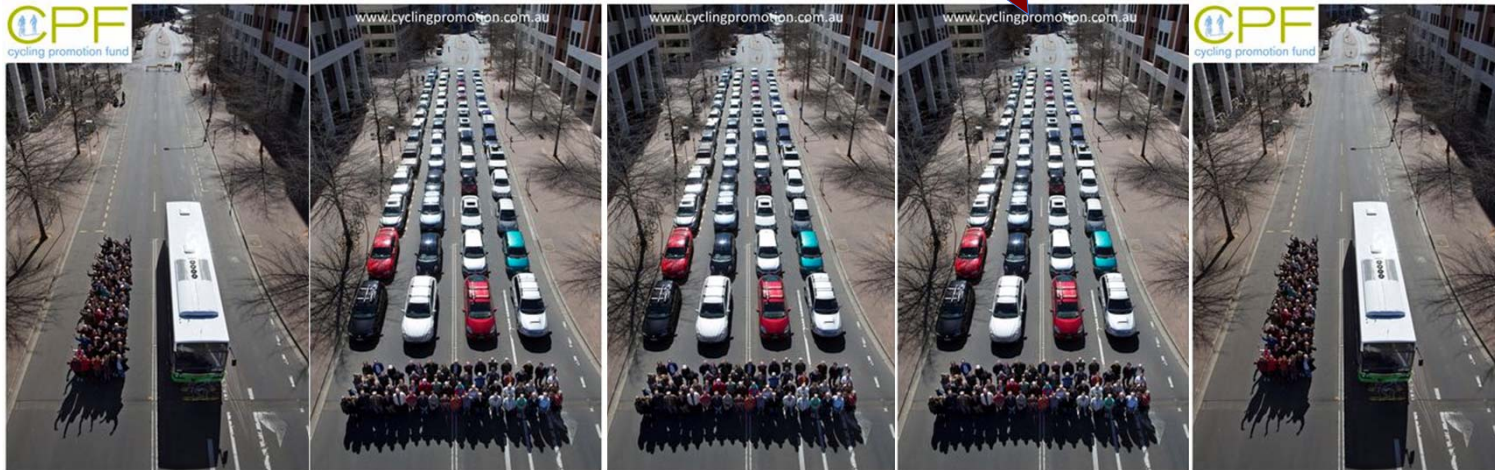
It's about Space

- Technology never changes geometry!

Worse than this!

If you make it easy, people do it more.

This is BIOLOGY



Bus

Private Car

Uber/Lyft Car

Driverless Car

Driverless Bus?



Questions?