

## MEMORANDUM

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TO: **Allstate**  
FROM: **FTI Consulting**  
DATE: **09 / 18 / 2015**  
RE: **Allstate/National Journal Heartland Monitor Orlando Metro Supplement Key Findings**

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*This memorandum outlines key findings from a survey of adults conducted September 10-16, 2015 in the Orlando metro area, including the counties of Lake, Orange, Osceola, and Seminole. The survey includes 134 interviews with City of Orlando residents. This survey investigates area residents' views on the local economy, innovation, and Orlando's future and is a continuation of similar studies conducted in Atlanta, Austin, Denver, and Detroit. The survey was conducted among a sample of 400 adults age 18+ living in the Orlando metro area, with 200 reached via cell phone and 200 reached via landline. The margin of error for a sample of 400 is +/- 4.9 in 95 out of 100 cases.*

## SUMMARY OF FINDINGS

These survey results tell the story of a region with optimism about long-term local economic improvement and immigration growth, but hesitations about the area's innovation.

Orlandoans view their current economy as good or fair, but not excellent, and they are less positive than residents of the Denver and Austin regions previously sampled. They think the city is headed in the right direction, but they are only slightly positive towards their local elected officials. They feel positively about the local tourism growth and they think the area is prepared to handle it.

Looking to local institutions, most think the ideas and solutions being offered are seen as merely adequate, but not particularly innovative and remarkable. Overwhelmingly, Orlandoans are looking for local institutions to try out new ideas and solutions – even if the outcomes may be uncertain – rather than relying on tried and tested solutions that do not yield new thinking.

## KEY FINDINGS

1. **Perceptions of the Orlando area are reasonably positive, and there is significant optimism about the region's long-term economic growth.**
  - Two-thirds (66%) think their local area is headed in the right direction, including 61% of city residents and 69% of those living outside the city.
    - This is on par with the national findings from February (66% right direction).
  - Half (53%) approve of their local political leaders, with ratings reasonably consistent among Republicans (63%), Democrats (55%), Hispanics (54%), and Whites (53%).
    - Orlando residents give their local political leaders a similar approval rating as Atlanta (51%), but this rating is lower than we've measured in Austin (62%), Denver (58%), Detroit (56%), and nationally (60%).



- Orlandoans give their economy an average rating. Slightly more than a third (36%) rate their local economy as good and another 46% say it is fair. The two extremes are rather low: six percent (6%) rate the economy as excellent and 12% say it is doing poorly.
  - Compared to other cities we have tested, Orlando's positive rating of 41% excellent/good sits near the bottom of the pack.
    - Austin, TX had a 74% excellent/good rating in July.
    - Denver, CO had a 63% excellent/good rating in February.
    - Atlanta, GA had a 49% excellent/good rating in August.
    - Detroit, MI had a 40% excellent/good rating in May.
  - Orlando's economy is rated moderately better than Americans nationally rated their local economy in February.
    - Orlando: 6% Excellent, 36% Good, 46% Fair and 12% Poor.
    - Nationally: 8% Excellent, 35% Good, 39% Fair and 18% Poor.
  - Local economic perceptions differ across the Orlando region. Residents who live outside of the city limits are more optimistic about their economy (43% excellent/good) than their city resident counterparts (39% excellent/good). Half of residents living in Lake County and Seminole County feel their local economy is performing well (53% and 52% excellent/good, respectively).
  - There is a measurable difference between the economic positivity of Generation X (46%) and Baby Boomers (45%) compared to Millennials (34%).
- Forty-five percent (45%) of Orlandoans believe that their local economy will remain unchanged over the next year, a slightly smaller amount of Orlandoans (40%) think it will improve, and 12% think it will become worse.
  - The economic outlook differs by region. City residents have mixed views with 45% saying the local economy will improve and 42% believing it will stay the same. More residents living outside the city limits feel the economy will stay status quo (47%) than improve (38%). Seminole County is the exception with 43% believing the local economy will improve over the year.
  - Orlando's one-year economic outlook is the least positive we have seen thus far among the previous cities surveyed; however, Orlandoans are more optimistic than American nationally (35% believe their local area economy will improve).
- Looking ten years into the future, six-in-ten (59%) say the Orlando economy will have improved by that point, while 23% believe it will be about the same, and 13% say it will become worse.
  - City residents again are very optimistic. Nearly three-in-four (73%) think the economy will improve over the next ten years. Only 52% of non-city residents share the same optimism.



- African Americans (76%) and Hispanics (67%) express much more optimism than Whites (50%).

**2. Orlandoans have positive feelings about the impact that a growing tourist population and immigrant population will have on their local area. However, they do not feel that local institutions are supporting the lives of the local residents.**

- In response to the information that the Orlando metropolitan area has had continued tourism growth and is the most visited destination in the United States, residents are enthusiastic about the impact with 77% viewing the growth as a positive thing and 15% seeing it in a negative light.
  - More than eight-in-ten (81%) Orlando city residents agree that the tourism growth will have a positive impact. Three-quarters (75%) of non-city residents are also optimistic. Lake County residents are the most cautious with only two-thirds (66%) believing the increase tourism will have a positive impact.
  - Younger Orlandoans (82%) are more hopeful about this growth than their older counterparts (71%).
  - Non-White residents (82%) view the growth in a positive light, more so than White residents (73%).
- When Orlandoans are asked if the city can handle the challenges and opportunities posed by this growth, almost six-in-ten (58%) believe the city is prepared.
  - Two-thirds of city residents (65%) see the region as being prepared, but only 55% of those in the suburbs feel the same.
  - Non-White residents (67%) are much more optimistic about the city's readiness than White residents (50%).
  - Age also factors into residents views: 62% of younger residents feel the city is prepared compared to 53% of older residents.
- When asked about the impact of immigrants from other counties settling in Orlando, more than half (53%) says the growth of immigrants "improves the local region by adding new workers, new customers for local businesses, and cultural diversity." Slightly more than a third (36%) believe it "hurts the local region by placing a strain on local resources and adding more competition for jobs."
  - Non-Whites residents feel that immigrants are improving the local area (63%) compared to only 43% of their White counterparts.
  - Younger residents are also more positive about the cultural diversity than older residents (62% and 39%, respectively).



- City and non-city residents share a similar positive belief (54% and 52%, respectively); however, only 36% of Lake County residents feel immigrants improve the area.
- When it comes to the attention of local institutions, Orlandoans believe that their focus is on attracting tourism and encouraging new people to move to the area (69%) rather than focusing on supporting and improving local residents and communities (25%). This belief is held across all demographic groups.
- Eight-in-ten (81%) of Orlandoans think the tourism and hospitality industry is what makes their region unique.
- The quality of the education system and traffic and other issues related to growth are tied as being considered the biggest challenges facing the local area (25% each).

**3. Orlandoans feel that their area produces run-of-the-mill ideas and solutions. While they recognize that innovation may be held back by local challenges, they want new and forward-thinking ideas.**

- A plurality of Orlandoans (40%) say that local institutions are offering “adequate but unremarkable” ideas and solutions while 27% say the ideas are “old and outdated.” Slightly more than two-in-ten (23%) metro area residents say that the offerings are “new and forward-thinking.”
- Less than half (46%) feel Orlando is “just as innovative or more innovative than other cities, but held back by local challenges.” Twenty-eight percent (28%) feel that Orlando is less innovative than other cities.
  - This negative view is larger than we have seen in any of the other cities tested: Atlanta (23%), Detroit (22%), and Austin (15%).
- Fewer than two-in-ten (18%) believe Orlando is more innovative than other cities.
  - This is on par with Atlantans (18%) and higher than the 10% of Detroiters who felt the same about their local area, but lags behind the strong perception of innovation reported by Austinites (30%).
- When asked where more progress is being made, 43% say at the state and local level and 31% say the national level.
  - Strikingly, opinions on this matter are reversed by race. Four-in-ten (40%) of Non-Whites believe that more progress is being made at the national level, with



38% citing the state or local level. Among Whites, 47% point to state and local progress and just 23% cite national progress.

- More than seven-in-ten (72%) would prefer “trying new ideas and solutions, even if the outcomes may be uncertain” rather than “relying on tried and tested ideas and solutions, even if it means a lack of new thinking” (21%).

**4. About half of Orlandoans share community events and entertainment options on social media.**

- When asked about social media posts, just slightly less than half (48%) admit to sharing information about local community issues or events that are important to them.
- Among those social media users, more than half say the posts they share about the community are related to events and entertainment (54%), charities or fundraiser (51%), and education or school (51%).

**5. Orlandoans consider supporting the community as an important reason to patronize local businesses.**

- When choosing to buy products and services from a local business, as opposed to a large chain or online, more than eight-in-ten Orlandoans find these as important factors that a business should demonstrate:
  - Exceptional and personalized customer service (95%);
  - A long record of employing people in the local community (87%); and
  - Active support of local community programs and events (86%).

**6. Shaquille O’Neal, Buddy Dyer, Arnold Palmer, and Tiger Woods are named as the most prominent living Orlando success stories, followed by an array of athletes, actors, musicians, and businessmen.**

- On an open-ended question in which survey respondents could name whoever they thought of as the best example of a notable Orlandoan, basketball player Shaquille O’Neal (named by 8% of respondents) received the most mentions followed closely by the current Mayor Buddy Dyer (6%), and golfers Arnold Palmer (5%) and Tiger Woods (5%).
- The top personality recalled by Hispanics was Mayor Buddy Dyer (9%), while Whites and African Americans mentioned Shaquille O’Neal (9% and 10%, respectively).



- Other politicians recalled by numerous respondents were former Governor Jeb Bush (2%) and Senator Bill Nelson (1%).
- Athletes mentioned included Kaká, Tim Tebow, Dwight Howard, the Orlando Magic basketball team, and Johnny Damon (each receiving 1% of all mentions).
- Entrepreneur Walt Disney and his creation Mickey Mouse were named as Orlando success stories (2% and 1% respectively).
- Businessmen Harris Rosen of Rosen Hotels and Resorts (3%) and David Siegel of Westgate Resorts (2%) help bring success to Orlando's tourism industry.
- Notable actors include Wesley Snipes (2%), Wayne Brady (1%), Delta Burke (1%), and Buddy Ebsen (1%).
- Boy band fans recalled 'N Sync (1%) and their lead signer Justin Timberlake (1%), as well as the Backstreet Boys (1%). Country singer John Anderson also received a few mentions (1%).
- Other notable mentions were Astronaut John Young (1%) and University of Central Florida President John Hitt (1%).

**7. When asked to name a prominent company that is particularly good for Orlando, its communities, and its people, Walt Disney World received the most mentions by far, followed by several other large Orlando-based theme parks and businesses.**

- Walt Disney World (named by 44% of respondents) led all other companies. Other theme parks mentioned were Universal Studios (13%) and SeaWorld Entertainment (5%).
- Companies receiving significant mentions were Lockheed Martin (10%), Publix Super Markets (8%), and Florida Hospital (5%).