



## Heartland Monitor Poll - Orlando Metro Supplement

Sample of 400 Adults Age 18+ in Orlando Metro Area (200 on landline, 200 on cell)

(Sample Margin of Error for 400 Respondents = ±4.9% in 95 out of 100 cases)

Conducted Sept 10-16, 2015

**Orlando Audience:** N=400 Adults Age 18+ living in Orlando; conducted Sept 10-16, 2015

**Atlanta Audience:** N=400 Adults Age 18+ living in Atlanta; conducted Aug 19-23, 2015

**Austin Audience:** N=400 Adults Age 18+ living in Austin; conducted July 8-12, 2015

**Detroit Audience:** N=400 Adults Age 18+ living in Detroit; conducted May 26-28, 2015

**Denver Audience:** N=400 Adults Age 18+ living in Denver; conducted February 22-25, 2015

**2/15 National Audience:** N=1,000 American Adults Age 18+; conducted February 18-22, 2015

- Thinking about the major challenges facing the country, do you think there is more progress being made today at...?

<u>More Progress Being Made At...</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
The state and local level	43%	41%	44%	49%	63%	64%
The national level	31%	35%	39%	27%	15%	26%
Don't know / refused	26%	24%	17%	24%	23%	10%

Now, I'd like to ask some questions about your local area, that is the area in which you live, work, and spend most of your time.

- Do you feel that your local area, in general, is headed in the right direction, or do you think things are seriously off on the wrong track?

<u>Direction Of Local Area</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
Right Direction	66%	66%	73%	69%	75%	66%
Wrong Track	23%	23%	21%	25%	19%	25%
Neither	7%	5%	4%	4%	2%	5%
Don't know / refused	4%	5%	1%	3%	4%	4%



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3. Do you approve or disapprove of the job that political leaders in your local area are doing?

<u>Local Political Leaders' Job Approval/Disapproval</u>	<b>ORLANDO</b>	ATLANTA	AUSTIN	DETROIT	DENVER	<b>2/15 NATIONAL</b>
Approve	53%	51%	62%	56%	58%	60%
Disapprove	31%	36%	29%	34%	28%	31%
Don't know / refused	16%	13%	9%	11%	14%	9%

4. And, how would you rate the economy in your local area? Is it...?

<u>Current State Of Local Economy</u>	<b>ORLANDO</b>	ATLANTA	AUSTIN	DETROIT	DENVER	<b>2/15 NATIONAL</b>
Excellent	6%	6%	27%	6%	12%	8%
Good	36%	42%	47%	34%	51%	35%
<b>EXCELLENT / GOOD</b>	<b>41%</b>	<b>49%</b>	<b>74%</b>	<b>40%</b>	<b>63%</b>	<b>42%</b>
Fair	46%	41%	23%	40%	29%	39%
Poor	12%	10%	3%	19%	7%	18%
<b>FAIR / POOR</b>	<b>58%</b>	<b>51%</b>	<b>25%</b>	<b>59%</b>	<b>36%</b>	<b>57%</b>
Don't know / refused	1%	*	1%	1%	1%	1%

5. And, over the next 12 months, do you think the economy in your local area will...?

<u>Change In Local Area Economy</u>	<b>ORLANDO</b>	ATLANTA	AUSTIN	DETROIT	DENVER	<b>2/15 NATIONAL</b>
Improve	40%	43%	48%	40%	48%	35%
Stay the same	45%	46%	45%	49%	42%	51%
Become worse	12%	9%	6%	10%	9%	11%
Don't know / refused	3%	3%	1%	1%	2%	2%



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6. Now, thinking broadly about how institutions like government, business, and community organizations in your local area respond to challenges and opportunities.

Do they typically offer ideas and solutions that are...?

<b>Local Institutions Offer Ideas And Solutions That Are...</b>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
New and forward-thinking	23%	18%	34%	21%	29%	28%
Adequate but unremarkable	40%	40%	41%	44%	40%	42%
Old and outdated	27%	30%	18%	29%	22%	21%
Don't know / refused	10%	11%	8%	6%	9%	8%

7. And, which approach would you prefer that local institutions take when faced with challenges and opportunities...

<b>Preferred Approach To Challenges And Opportunities</b>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
Trying new ideas and solutions, even if the outcomes may be uncertain	72%	75%	71%	74%	78%	71%
Relying on tried and tested ideas and solutions, even if means a lack of new thinking	21%	17%	18%	20%	15%	20%
Don't know / refused	7%	8%	11%	6%	7%	9%

8. Which of the following do you think would do the most to improve the quality of life in your local area?

<b>Improve The Quality Of Life In Your Local Area</b>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
More local investments by government in areas like education and transportation	37%	34%	34%	30%	33%	25%
A reduction in crime and illegal drugs	23%	16%	10%	16%	13%	16%
More local investments by businesses	14%	17%	14%	22%	22%	22%
Lower local and property taxes	13%	20%	29%	19%	16%	21%
More local volunteering in community activities	10%	8%	9%	10%	12%	10%
Don't know / refused	2%	4%	3%	2%	4%	4%



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Switching topics to the City of Orlando...

9. In your opinion, what will the Orlando economy look like 10 years from now?

<b>Outlook For City's Economy</b>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>
Much improved	20%	19%	20%	27%
Somewhat improved	39%	42%	40%	44%
<b>TOTAL IMPROVED</b>	<b>59%</b>	<b>61%</b>	<b>60%</b>	<b>71%</b>
<b>ABOUT THE SAME</b>	<b>23%</b>	<b>21%</b>	<b>22%</b>	<b>14%</b>
Somewhat worse	6%	9%	10%	8%
Much worse	6%	4%	5%	5%
<b>TOTAL WORSE</b>	<b>13%</b>	<b>13%</b>	<b>15%</b>	<b>13%</b>
Don't know / refused	5%	5%	3%	2%

10. Now, as you may know, tourism continues to grow in Orlando and it is the most visited destination in the United States.

Do you believe that this growth in tourism has had an overall positive or overall negative impact on your local area?

<b>Growth Impact On Local Area</b>	<b>ORLANDO</b>
Overall positive	77%
Overall negative	15%
Neither	6%
Don't know/ refused	1%

11. And, considering the challenges and opportunities posed by this growth, do you believe your local area is generally prepared or unprepared to handle this growth over the next several years?

<b>Preparedness For Growth In Local Area</b>	<b>ORLANDO</b>
Prepared	58%
Unprepared	39%
Don't know / refused	3%



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12. Would you say that in general, the growing number of immigrants from other countries settling in the Orlando area...?

<b>Impact Of Immigrants On Orlando</b>	<b>ORLANDO</b>
Improves the local region by adding new workers, new customers for local businesses, and cultural diversity	53%
Hurts the local region by placing a strain on local resources and adding more competition for jobs	36%
Don't know / refused	11%

13. In the Orlando area today, which do you think receives the most attention and resources from local institutions like government and businesses...?

<b>Local Institutions' Attention</b>	<b>ORLANDO</b>
Attracting tourism and encouraging new people to move to the area	69%
Supporting and improving local residents and communities	25%
Don't know / refused	6%

14. Which of the following do you believe makes Orlando most unique compared to other cities?

<b>Orlando's Most Unique Factor</b>	<b>ORLANDO</b>
Tourism and Hospitality	81%
Health Care and Biotechnology	5%
Aerospace and Defense	5%
Transportation	2%
Technology	2%
Film and television	1%
Don't know / refused	3%



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15. And, compared to other large cities, do you believe the ideas and solutions being proposed by leaders and local institutions in Orlando are...

<u>Ideas And Solutions For City</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>
More innovative than other cities	18%	18%	30%	10%
Just as or more innovative as other cities, but held back by local challenges	46%	53%	48%	60%
Less innovative than other cities	28%	23%	15%	22%
Don't know / refused	8%	5%	7%	8%

16. What do you consider to be the biggest challenge facing your local area?

<u>Biggest Challenge For Local Area</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>
The quality of the education system	25%	18%	11%
Traffic and other issues relating to growth	25%	38%	52%
Social problems like crime and poverty	22%	17%	5%
Creating enough good jobs	17%	17%	7%
The cost of housing	5%	4%	17%
Other	6%	4%	5%
Don't know / refused	*	1%	2%

17. How long have you lived in the Orlando area?

<u>Length Of Residency</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>
Less than 5 years	9%	4%	6%
5-9 years	12%	9%	15%
10-14 years	15%	14%	14%
15-19 years	15%	12%	12%
20+ years	38%	42%	31%
Whole Life	11%	19%	21%
Don't know / refused	--	1%	1%



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18. Have you ever used social media to share information about a local community issue or event that was important to you?

<b>Shared Community Information On Social Media</b>	<b>ORLANDO</b>
Yes	48%
No	51%
Don't know / refused	1%

19. Specifically, which of the following community issues or events have you shared information about?

<b>Type Of Community Information Shared On Social Media</b> (Asked Of N=193 Social Media Users That Share Community Information)	<b>ORLANDO</b>
Events or entertainment	54%
Charities or fundraisers	51%
Education or schools	51%
Politics or government	47%
Crime or public safety	43%
Health or wellness	37%
Business or economy	34%
None of the above	*
Don't know / refused	--



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When you consider buying products or services from a local business, as opposed to a large chain or online, how important is it for that business to demonstrate...?

<b>Important Factors For Choosing Local Businesses</b> <i>(Ranked By Total Important)</i>	<b>Total Important</b>	<b>Total Not Important</b>	<b>Very Imp</b>	<b>Some-what Imp</b>	<b>Not Very Imp</b>	<b>Not At All Imp</b>	<b>DK/REF</b>
20. Exceptional and personalized customer service	95%	4%	81%	13%	3%	1%	1%
21. A long record of employing people in the local community	87%	12%	59%	28%	7%	5%	1%
22. Active support of local community programs and events	86%	13%	51%	35%	9%	4%	1%





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23. As you know, there are many famous and prominent people who hail from Orlando. What one or two living people can you think of who represent an Orlando success story and someone you are proud to call an Orlandoan? This can be someone from the business community, politics, sports, entertainment, or another prominent position.

<b>Prominent People Who Represent An Orlando Success Story</b>	<b>ORLANDO</b>
Shaquille O’Neal	8%
Buddy Dyer	6%
Arnold Palmer	5%
Tiger Woods	5%
Harris Rosen	3%
Jeb Bush	2%
Walt Disney	2%
David Siegel	2%
Wesley Snipes	2%
Tim Tebow	1%
Backstreet Boys	1%
Dwight Howard	1%
“Kaká” (Ricardo Izecson dos Santos Leite)	1%
Justin Timberlake	1%
Wayne Brady	1%
Mickey Mouse	1%
John Hitt	1%
Johnny Damon	1%
John Morgan	1%
Delta Burke	1%
Bill Nelson	1%
‘N Sync	1%
John Young	1%
John Anderson	1%
Buddy Ebsen	1%
Orlando Magic	1%
Other people with only one or two mentions	17%
Don’t know / refused	43%



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24. And, as you know, Orlando is home to some prominent businesses and companies. Which companies come to mind at being particularly good for Orlando, its communities, and its people?

<b>Prominent Businesses And Companies Who Are Particularly Good For Orlando</b>	<b>ORLANDO</b>
Walt Disney World	44%
Universal Studios	13%
Lockheed Martin	10%
Publix Super Markets	8%
Florida Hospital	5%
SeaWorld Entertainment	5%
Darden Restaurants	4%
Orlando Health	3%
Walmart	3%
University of Central Florida	3%
Siemens Corporation	3%
NASA	2%
Martin Marietta Corporation	2%
Rosen Hotels & Resorts	2%
Orlando City Soccer Club	2%
Theme Parks (General)	2%
Hospitals (General)	1%
Morgan & Morgan	1%
Bright House Networks	1%
Nemours Children's Hospital	1%
Target	1%
Hotels (General)	1%
The Fresh Market	1%
Orlando Regional Medical Center	1%
Shopping (General)	1%
Tupperware Brands Corporation	1%
Red Lobster	1%
Orlando Magic	1%
Orlando World Center Marriott	1%
Verizon	1%
Valencia College	1%
Other companies/industries with only one or two mentions	10%
Don't know / refused	16%



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### DEMOGRAPHICS

#### A. County

<u>County</u>	<b>ORLANDO</b>
Lake County	14%
Orange County	54%
Osceola County	12%
Seminole County	20%

#### B. Do you live...?

<u>Orlando City</u>	<b>ORLANDO</b>
Within the city limits of Orlando	34%
Elsewhere within the metro area	66%

#### C. Gender

<u>Gender</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
Male	48%	48%	50%	48%	49%	49%
Female	52%	52%	50%	52%	51%	51%

#### D. Age

<u>Age</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
18 – 29	22%	20%	23%	18%	22%	22%
30 – 39	18%	19%	22%	17%	20%	17%
40 – 49	19%	20%	20%	16%	20%	18%
50 – 59	17%	19%	17%	21%	18%	16%
60 – 64	7%	7%	7%	9%	7%	8%
65+	17%	15%	11%	19%	13%	18%
Refused	--	--	--	--	*	1%



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E. What is your main ethnic or racial background?

<u>Race/Ethnicity</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
White or Caucasian	52%	44%	57%	69%	70%	68%
Hispanic or Latino	25%	8%	27%	3%	16%	10%
African-American or Black	16%	39%	7%	22%	7%	12%
Asian-American or Asian	3%	2%	4%	1%	1%	2%
Native American	*	1%	*	*	1%	1%
Other	3%	3%	2%	3%	3%	4%
Don't know / refused	1%	3%	3%	2%	2%	3%

F. Are you registered to vote?

<u>Registered To Vote</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>
Yes	93%	95%	89%	84%
No	7%	5%	11%	13%
Don't know / refused	--	*	--	3%

G. Thinking about children, which of the following describes you?

<u>Children</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
<b>Parents</b> (multiple responses accepted)	<b>69%</b>	<b>62%</b>	<b>64%</b>	<b>64%</b>	<b>71%</b>	<b>70%</b>
I have school-age children	33%	28%	34%	24%	41%	32%
I have adult children age 18 or older	44%	39%	36%	45%	36%	45%
<b>Non-Parents</b>	<b>31%</b>	<b>34%</b>	<b>34%</b>	<b>35%</b>	<b>29%</b>	<b>27%</b>
I have no children but hope to one day	20%	18%	21%	20%	12%	17%
I have no children and no plans to have any	11%	16%	13%	15%	17%	11%
Don't know / refused	1%	4%	1%	2%	1%	3%



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H. What is the last grade of formal education you have completed?

<u>Education</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
Less than high school	4%	1%	2%	2%	2%	5%
High school graduate	14%	14%	21%	22%	15%	23%
Some college/vocational school	33%	21%	27%	29%	33%	28%
College graduate	32%	42%	31%	29%	32%	28%
Post graduate	16%	19%	18%	17%	18%	14%
Don't know / refused	1%	3%	1%	2%	*	1%

I. And, do you think of yourself as a Republican, a Democrat, an Independent, or something else?

<u>Party Affiliation</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
Republican	27%	17%	23%	18%	24%	23%
Democrat	34%	40%	33%	28%	31%	25%
<b>Total Independent /Other</b>	<b>36%</b>	<b>39%</b>	<b>41%</b>	<b>49%</b>	<b>43%</b>	<b>49%</b>
Independent	25%	23%	23%	28%	29%	29%
Something Else	10%	14%	17%	19%	13%	18%
Other	1%	2%	1%	2%	1%	2%
Don't know / refused	4%	4%	2%	5%	2%	3%

J. Which of the following best describes your current employment status?

<u>Employment Status</u>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>	<b>DENVER</b>	<b>2/15 NATIONAL</b>
Employed full-time	55%	57%	56%	48%	62%	46%
Employed part-time	10%	7%	12%	9%	10%	10%
Retired	16%	17%	15%	23%	14%	22%
Student	7%	3%	6%	5%	2%	7%
Homemaker	3%	6%	5%	3%	6%	5%
Unemployed and looking for work	4%	3%	2%	7%	3%	5%
Unemployed but not looking for work	2%	2%	2%	3%	2%	3%
Don't know / refused	1%	5%	2%	2%	1%	2%



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K. People are often classified in different economic categories. Do you consider yourself to be...?

<u>Economic Status</u>	ORLANDO	ATLANTA	AUSTIN	DETROIT	DENVER	2/15 NATIONAL
Upper Class	2%	4%	3%	3%	3%	2%
Upper Middle Class	19%	22%	24%	19%	20%	14%
Middle Class	50%	46%	48%	45%	47%	47%
Lower Middle Class	21%	17%	18%	21%	19%	22%
Lower Class	6%	5%	4%	10%	9%	12%
Don't know / refused	2%	7%	3%	3%	2%	3%

L. Please tell me which of the following categories best applies to your total annual household income?

<u>Annual Household Income</u>	ORLANDO	ATLANTA	AUSTIN	DETROIT	DENVER	2/15 NATIONAL
Less than \$15,000	7%	5%	4%	9%	7%	11%
\$15,000 to less than \$30,000	13%	9%	12%	15%	12%	14%
\$30,000 to less than \$50,000	16%	13%	16%	16%	16%	16%
\$50,000 to less than \$75,000	21%	17%	16%	14%	15%	16%
\$75,000 to less than \$100,000	13%	14%	17%	12%	14%	13%
\$100,000 to less than \$200,000	14%	18%	18%	15%	20%	14%
\$200,000 or more	4%	7%	6%	6%	6%	3%
Don't know / refused	12%	17%	11%	14%	10%	13%

M. Which most accurately describes your current living situation?

<u>Current Living Situation</u>	ORLANDO	ATLANTA	AUSTIN	DETROIT
I rent my home	26%	22%	23%	23%
I own my home, but pay a mortgage	51%	51%	52%	42%
I have paid off my mortgage and own my home fully	17%	19%	19%	26%
Other	5%	3%	4%	NA
Don't know/ refused ( <i>Other included for Detroit</i> )	2%	4%	3%	9%



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N. How likely are you to vote in the 2016 election for president?

<b>Likelihood To Vote In 2016</b>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>
Very likely	85%	82%	79%	76%
Somewhat likely	6%	7%	9%	9%
Not very likely	2%	3%	3%	3%
Not at all likely	4%	3%	6%	9%
Don't know / refused	3%	6%	4%	3%

O. Which best describes your vote history?

<b>Vote History</b>	<b>ORLANDO</b>	<b>ATLANTA</b>	<b>AUSTIN</b>	<b>DETROIT</b>
I almost always vote in every local, state, and national election	51%	45%	35%	44%
I try to vote in every election, but sometimes miss local elections	27%	28%	35%	25%
I usually vote only in national elections	10%	12%	10%	9%
I usually vote only in local and state elections	1%	2%	1%	1%
I rarely vote at all	5%	3%	5%	15%
I never vote	4%	5%	10%	NA
I was under 18 for the last election	*	*	2%	NA
Don't know / refused	1%	4%	2%	5%