



You don't know the half of it.<sup>®</sup>



This is where we aimed for the  
moon and never looked back.





This is where future Amazonians  
are migrating and graduating.



ORLANDO

This is where fantastical  
dreams become reality.



ORLANDO

This is where we welcome  
all to join something bigger  
than themselves.

**Our regional leaders are in full support of welcoming Amazon HQ2.O.**



Buddy Dyer  
City of Orlando  
Mayor  
Buddy Dyer



Teresa Jacobs  
Orange County  
Mayor  
Teresa Jacobs



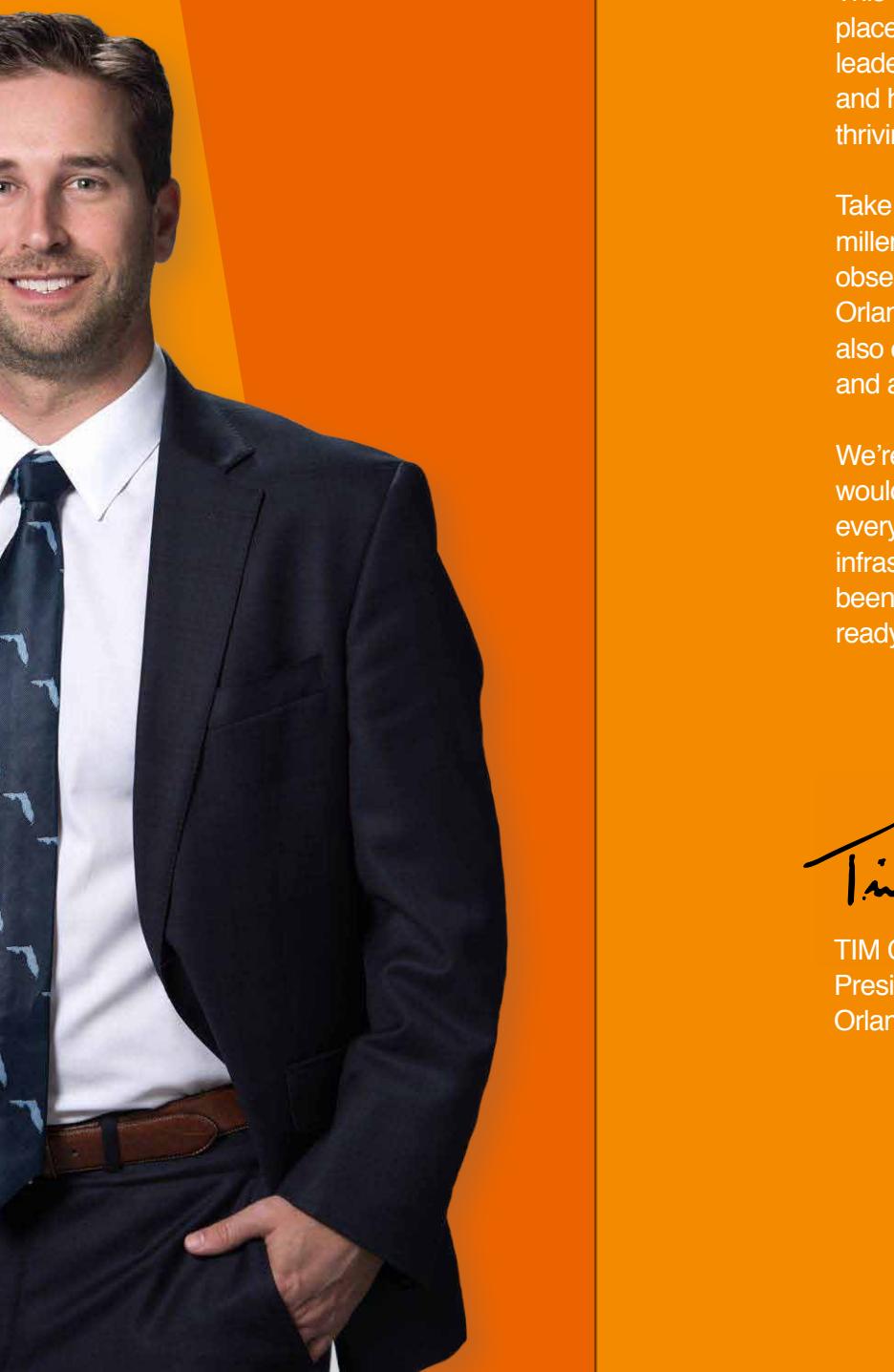
Brandon Arrington  
Osceola County  
Chairman  
Brandon Arrington



John Horan  
Seminole County  
Chairman  
John Horan



Timothy Sullivan  
Lake County  
Chairman  
Timothy Sullivan



**1,000+**  
NEW RESIDENTS  
MOVING INTO  
ORLANDO  
EVERY WEEK

**TIM GIULIANI**  
President + CEO  
Orlando Economic Partnership



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# We're both on the rise – Let's grow together.

Our region is defining the promise and potential of the nation's third largest state. Just as Orlando sits squarely at the geographic crossroads of Florida, so does its earned reputation as the intersection of a globally recognized brand and its emergence as a dynamic, magnetic international city and one of the top 10 locations in the country for business, according to *Chief Executive Magazine*.

Blue sky potential and a pro-business ethos live here. A vast array of industries from video gaming to biomedical research thrives here. A full spectrum of businesses, headquarters to start-ups, grow here. Public and private leaders collaborate to solve tomorrow's demands here. An incredible outdoor lifestyle with year-round sunshine flourishes here. We are the world's top vacation destination and experts at hospitality for a reason. Like Amazon, we are dedicated to enhancing our guests' experience.

You'll find Orlando and Amazon share even more similarities. We quickly rose to fame after creating unique products and delivering exceptional customer service that is second-to-none. We have adapted and grown by extending service offerings, diversifying portfolios and creating new technologies that benefit the world. We share similar trajectories, growing exponentially beyond anyone's expectations.

Propelled by a culture of collaboration, a spirit of inclusiveness and a propensity for customer obsession, Orlando has been planning for its growth while quietly becoming one of the strongest business markets in the United States. How did this happen? How did Orlando become one of America's most surprisingly dynamic places? That's what you'll find out in this proposal.

When you are new to Orlando, you're not the exception—you're the rule. And while our region is expanding, it remains a small world when it comes to the welcoming spirit that dwells within. It will be easy for Amazonians to find common threads in the fabric of Orlando and quickly become integrated in our community leadership. Just ask our fearless leader, Tim. Less than one year ago he, his wife and their kids relocated from the Research Triangle to Orlando. Before the moving truck even made it to Orlando, the community was busy setting up playdates, planning dinners and sharing babysitter contacts. This is Orlando. Hospitality is our way of life.

As the region's economic development organization charged with cultivating new business development in this rapidly growing area, the Orlando Economic Partnership stands ready to assist you throughout the site selection process, during relocation and then on to the babysitter recommendations. Our strong relationships with the state's and region's political and business leaders contribute to our success in assisting the relocation and expansion of many companies every year. We invite you to learn why Orlando is more than just a great place to visit; it's also a great place to live and do business.



## Talent and Workforce – Check!

With a robust labor pool of more than two million workers and a pipeline of 500,000 students within a 100-mile radius of downtown Orlando, we absolutely meet your needs for talent—even for software development engineers—now and into the future. We also have the ability to custom create scalability through the region's educational institutions who are ready and able to create programs that meet and exceed your needs. When it comes to recruiting team members to Orlando, the fact is, it often sells itself. Affordable, high quality living is a major driver in successfully relocating core, senior management staff here. Families enjoy year-round outdoor sports and recreation as well as an assortment of schools that meet the cultural and educational needs of all learners.

## Infrastructure – Check!

In a time when many cities are struggling with crumbling infrastructure, Orlando is making \$10 billion in infrastructure investments for expansions and improvements that are well underway to road, rail, air, sea and even space travel in the region. These assets allow for the speedy and efficient means to move people and products around the globe and beyond. Our infrastructure projects are not slowed down by government red tape, in fact, just 20 percent of the region's road projects are federally funded, significantly lower than the national average of 80 percent.

With 68 million visitors per year, we're experts at transportation and communication. Orlando is wired for growth with ample fiber providers who are enhancing all aspects of life. For example, a data-driven technology roadmap is being deployed as part of Orlando's Green Works initiative in a partnership with Siemens that can reduce greenhouse gas emissions and transform our mobility options. Orlando's commitment to a sustainable future includes programs to accelerate energy-efficiency, leverage the power of the sun and encourage eco-friendly lifestyles.

**Projected Company Growth Analysis**

1,449,938  
1,222,853  
982,724  
742,594  
502,465  
341,400  
154,100  
117,300  
88,400  
56,200  
33,700  
1,137,390

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020

Amazon Full Time Employees      Orlando Total Labor Force

## Sites

There are a variety of site options whether you choose to create an Amazon city from the ground up, move into a Neo-urban growth area, inhabit the urban core of our downtown, or even combine these sites for an expansive HQ2 that spans the breadth of these offerings. We are thinking big and offering a wide range of real estate options—because we can.

- 1 **Downtown Orlando** – Urban infill opportunity in the heart of downtown Orlando and Creative Village with access to mass transit and entertainment venues.
- 2 **Lake Nona & Sunbridge** – A 100+ acre site adjacent to the international airport with an innovative, neo-urban community that *Fortune* named the 'Next Great American City' and is the only Cisco U.S. Smart and Connected City 10G fiber network.
- 3 **NeoCity** – 100+ buildable acres near a state-of-the-art microelectronics facility and within 20 minutes of the Orlando International Airport.
- 4 **Tupperware** – 120 acres at the Osceola Corporate Center with great transportation access including major roads, interstates and onsite SunRail station, the region's commuter rail line.
- 5 Your choice of a combination of any of the above options.

## No. 2 FASTEST GROWING CITY OF 2017

(Forbes)

Population:

4,324,210 (Seven Counties)

2,441,257 (MSA)

2,036,848 (Seven counties)

1,257,083 (MSA)

Size:

4,012 square miles

Avg. Household Income:

\$51,077

Median Age:

37

Total Households:

910,546

Unemployment Rate:

3.8%

Climate (Annual averages):

May – Oct 89° / 72°

Nov – Apr 75° / 56°

2017 Population by Race:

67.1% White

16.9% Black

7.3% Another race

4.4% Asian

3.8% Two or more races

0.4% American Indian

0.1% Pacific Islander

30.3% Hispanic

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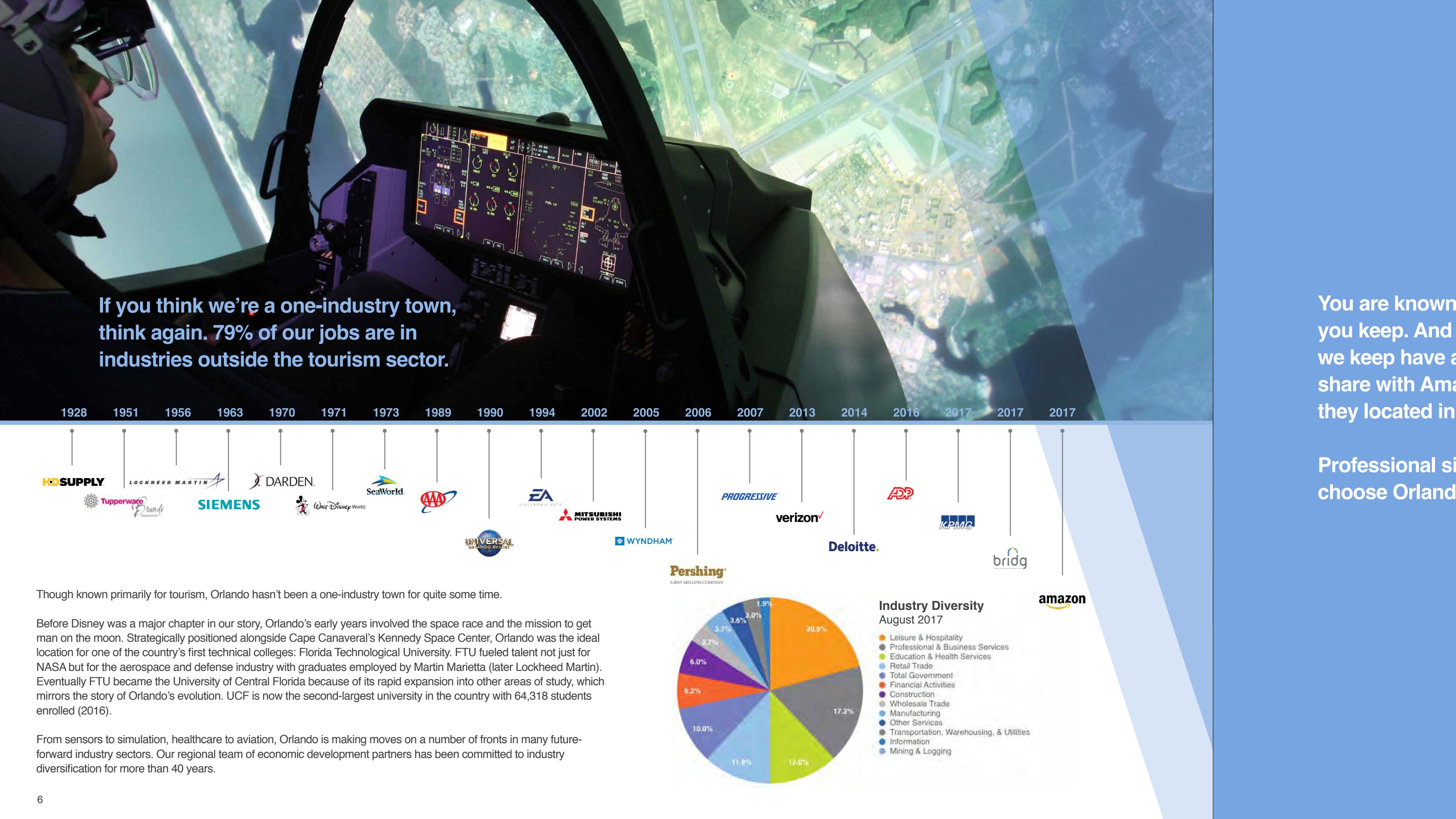
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0.4% American Indian

0.1% Pacific



You are known by the company you keep. And the companies we keep have a lot they can share with Amazon about why they located in Orlando.

## Professional site selectors choose Orlando.



"The opportunity to team up with other organizations was really important to us, and the ease of travel. It is because of that relationship that we chose to build the KPMG Learning Development and Innovation Center right here in Orlando's Lake Nona community."

— LYNN DOUGHTIE, Chairman and CEO, KPMG

**KPMG, LLC** is building its new 55-acre, 800,000-square-foot learning, development and innovation facility in Lake Nona located in the City of Orlando. KPMG expects to create 80 high-wage jobs in Orlando and make a **\$430 million capital investment**, the company's largest capital investment project ever. Construction on the state-of-the-art facility is scheduled to be completed in 2019. Once open, more than 20,000 KPMG associates will train here annually.



"Ultimately, ADP was impressed with the Orlando region's strong demographics, workforce and talent pipeline. The company focuses on hiring recent graduates with 4-year degrees and the University of Central Florida's annual graduating class of more than 24,000 among its 63,000 students overall was certainly a draw."

— WADLEY DONOVAN GUTSHAW CONSULTING GROUP

**ADP, LLC** located its new office in the City of Maitland in Orange County, hiring 1,600 new employees within the next five years and making a capital investment of **\$28 million**.



"The Orlando area proved to be a great location for the U.S. Delivery Center. We met our initial hiring goals in half the time we expected it would take and given the success of the center and to stay ahead of clients' needs, we're adding up to 850 new jobs to our Lake Mary Center. The strength of the region – including a thriving international community and well-respected educational institutions, providing access to skilled, tech savvy workers – confirms our original choice for this location and makes expansion an easy call."

— BERT NAQUIN, Managing Director, Deloitte Consulting LLP and Center Director

**Deloitte Consulting, LLP** has hired 1,600 people in two to three years at its U.S. Technology Delivery Center, in Seminole County. The company has made a **capital investment of \$24 million** and is now on its third wave of hiring in the Orlando region.



### Once upon a time...

A man named Walt Disney came to Orlando. There he found the space he lacked in California. Finally there was room to create, unburdened by the disorderly sprawl that had grown up around Disneyland. Walt Disney World Resort would include not only an amusement park like Disneyland but also hotels, cruise ships, campgrounds, golf courses, and shopping villages. Walt Disney World became the premier vacation destination in the world almost overnight.

One of Walt Disney's last plans had been for the Experimental Prototype Community of Tomorrow, "EPCOT" as he called it. A combination of Future World and World Showcase, Epcot Center broke ground in 1979 representing an investment of over \$1 billion dollars, or \$3.5 billion today.

## Fantasy Meets Reality

Space. Unencumbered room to create. Historic investment. Land transformed into a global destination seemingly overnight. The ability to imagine and bring to reality the prototype of tomorrow. Orlando can be Amazon's new frontier—an experimental, technology-rich community of tomorrow helping to drive its next industrial disruptions. This is not a fairytale. This is our proven history and our certain future as one of the world's great cities.

**Our demographics mirror the larger U.S. population.** Why does this matter to Amazon? Orlando's diversity allows companies to use Orlando as a testing ground for scalable innovations. Pilot programs of all types from healthcare technology to automated vehicle testing are creating breakthroughs here every day. For example, Florida Hospital can provide one-of-a-kind access to real-time patient data from its Orlando location.

We are prepared for, and dedicated to, shaping tomorrow. This manifesto is reflected in the myriad of regional initiatives underway from substantial investment in our infrastructure, business-friendly governance and collaborative educational ecosystem to our accelerated implementation of sustainable solutions and commitment to inclusivity. Tomorrowland was imagined here and its spirit of innovation through technology propels Orlando forward.

## Tomorrowland's Testing Grounds

Our boundless connectivity is a catalyst for innovation and the region is quickly becoming a testing ground for the world. For example, in 1992, the city partnered with Avis, GM and the United States Department of Transportation (U.S. DOT) to test GPS navigation in rental cars. Fast-forward 25 years and now the region is an innovation center for automated vehicle technology.

The U.S. DOT recently designated Orlando as one of ten automated vehicle (AV) proving ground sites. Through the Central Florida Automated Vehicle Partnership, which includes local academic, private sector and government agencies, the foundation for the safe testing, application demonstration and deployment of new automated vehicle technologies is being carried out here.

Through the Central Florida Automated Vehicle Partnership, research and simulation will be conducted at some of the area's universities including UCF and Florida Polytechnic University. Research and simulation will be conducted at our universities, including the University of Central Florida and Florida Polytechnic University. Safety and policy compliance review will be managed by the College of Law within Florida A&M University-Florida State University (FAMU-FSU) College of Engineering. Other participating facilities include the Roadway Network and Swamp Works Lab at NASA's Kennedy Space Center, the UCF Transportation Lab, the City of Orlando's downtown urban core, interstates, expressways, and SunTrax—the only dedicated high-speed AV and tolling testing center in the southeastern United States.

House Bill 7027 was passed in 2016, which cleared the way for all forms of AV testing. Florida's support, in combination with the access to qualified talent, has attracted one of the leading companies working to disrupt the automobile industry, Luminar. Luminar Technologies, Inc. is producing advanced sensor technologies for the autonomous vehicle industry.

### Highlights

**NASA Kennedy Space Center (KSC)** will provide a controlled testing facility that offers the ideal contained environment with a vast roadway network and secure access. KSC can conduct controlled extreme environment testing for significant weather events and unusual roadway conditions.

**The Cape Canaveral Spaceport** offers many benefits to the emerging commercial aerospace industry. With the legacy of NASA and the Air Force, its experienced local talent, innovative workforce, mature industrial base and suppliers make the CCS an ideal place for operations. More than just operations, the CCS has become the hub for human spaceflight transportation development. Both the Orion Multi-Purpose Crew Vehicle and the CST-100 Commercial Crew Transportation System have been selected to undergo final assembly and test operations at the CCS.

Transit testing on **LYNX's LYMMO Orange** line in downtown Orlando is exploring the use of automated shuttles and automated shared-use vehicles.

**SunTrax** is a new transportation technology testing facility, including a 2.25-mile oval track designed for high-speed travel and multiple lanes on a 400-acre site in Polk County, centrally located between Tampa and Orlando. The vision for SunTrax includes the build-out of multiple environments, including a simulated downtown urban core to test transit, vehicle, pedestrian and bicycle interactions with AVs.



JASON EICHENHOLZ  
Co-Founder + Chief Technology  
Officer of Luminar

"Orlando is home to the highest concentration of LiDAR expertise in the world — all within a 10-mile radius of our building. There is a huge infrastructure and pool of talent in optics and photonics between multiple Fortune 500 companies and the University of Central Florida's College of Optics and Photonics, known as CREOL. The quality of talent is unbeatable, and I've been able to put together a world-class team with more than 800 years of combined LiDAR experience to work on R&D, engineering and manufacturing. All of this has come together to build a system that meets the needs of the world's top AV programs, including Toyota Research Institute."

# Orlando's Got Talent

## Orlando is the perfect place to find many of your future Amazonians.

We have the talent pool you need to get started right now and the continuously flowing pipeline to keep that pool filled with candidates. Candidates who are not only qualified, but also more inclined to stay in the region. Our lifestyle, amenities, and tax climate and wealth make people want to plant roots here. Add industry-leading Amazon to the mix as a major employer, and that talent is a "self-pool-filling prophecy," for continued recruitment and development.

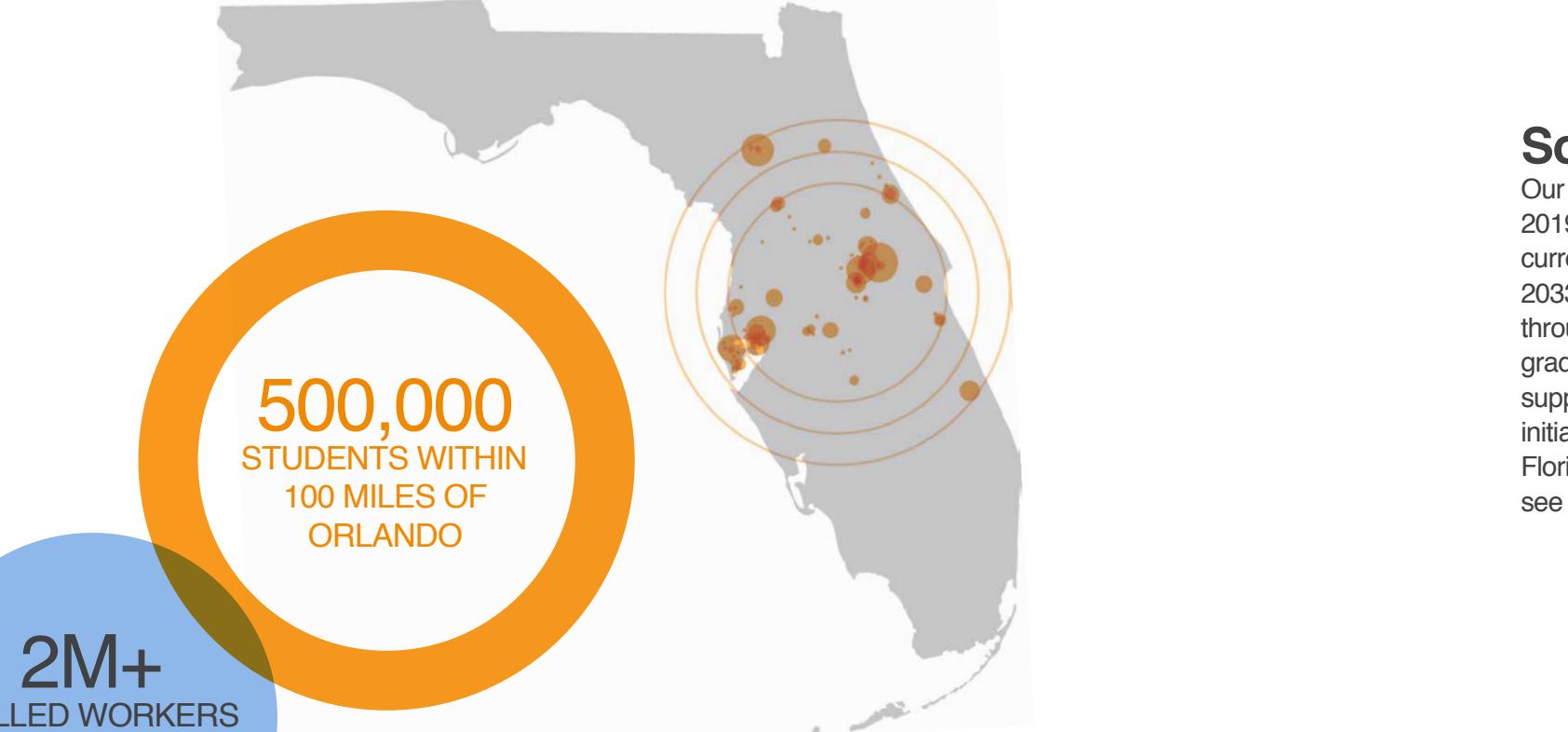
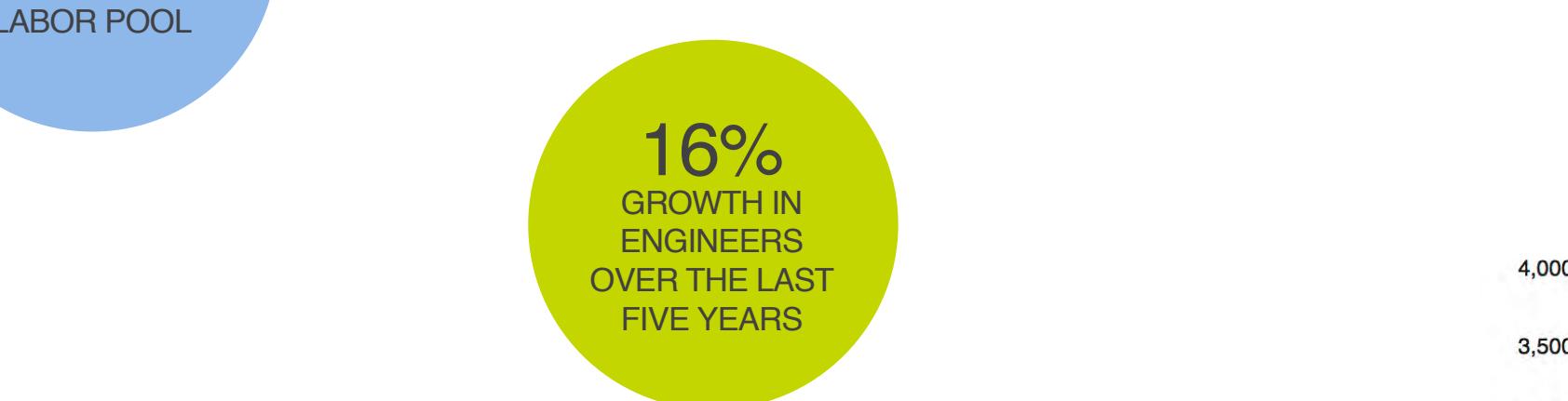
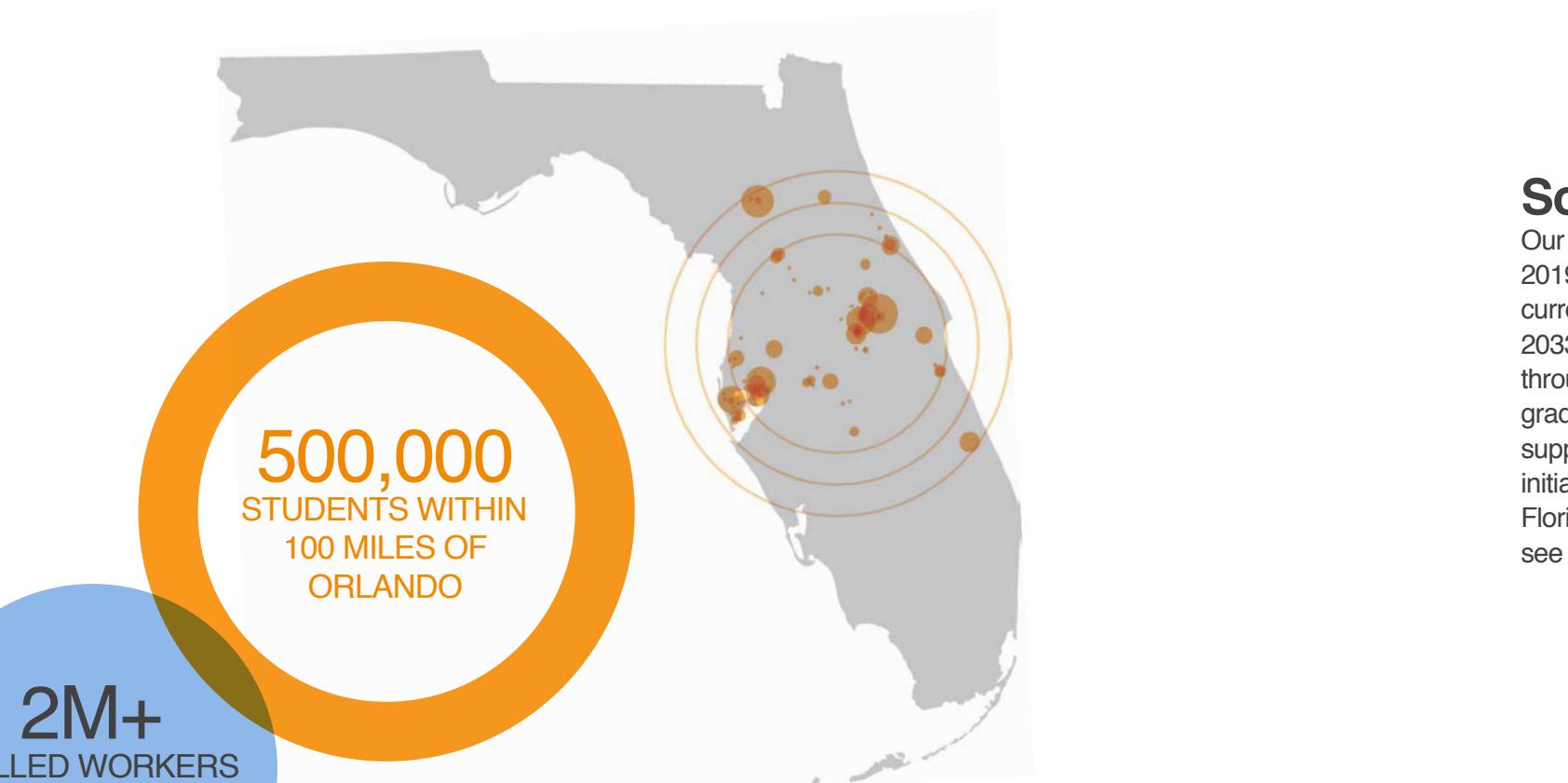
From its customer-friendly roots to cutting-edge aspirations, there's a reason Orlando has successfully attracted some of the biggest names in the business. And as executives of recently located headquarters have found, exceptional employees from all over the world are attracted to Orlando because of its quality of life and favorable cost of living. Powerhouse technology companies including FIS, Fiserv, Oracle, Lockheed Martin, SAP, Universal Studios, and Veritas have discovered an environment that is rich in innovation, deep in talent, and committed to doing what it takes to help local companies succeed.

Each occupation sector relevant to Amazon's operations has seen positive, if not double-digit growth over the last five years. Our exceptional university and college system combined with our unique quality of life ensures a strong and stable labor pool.

### Amazon's Regional Labor Pool

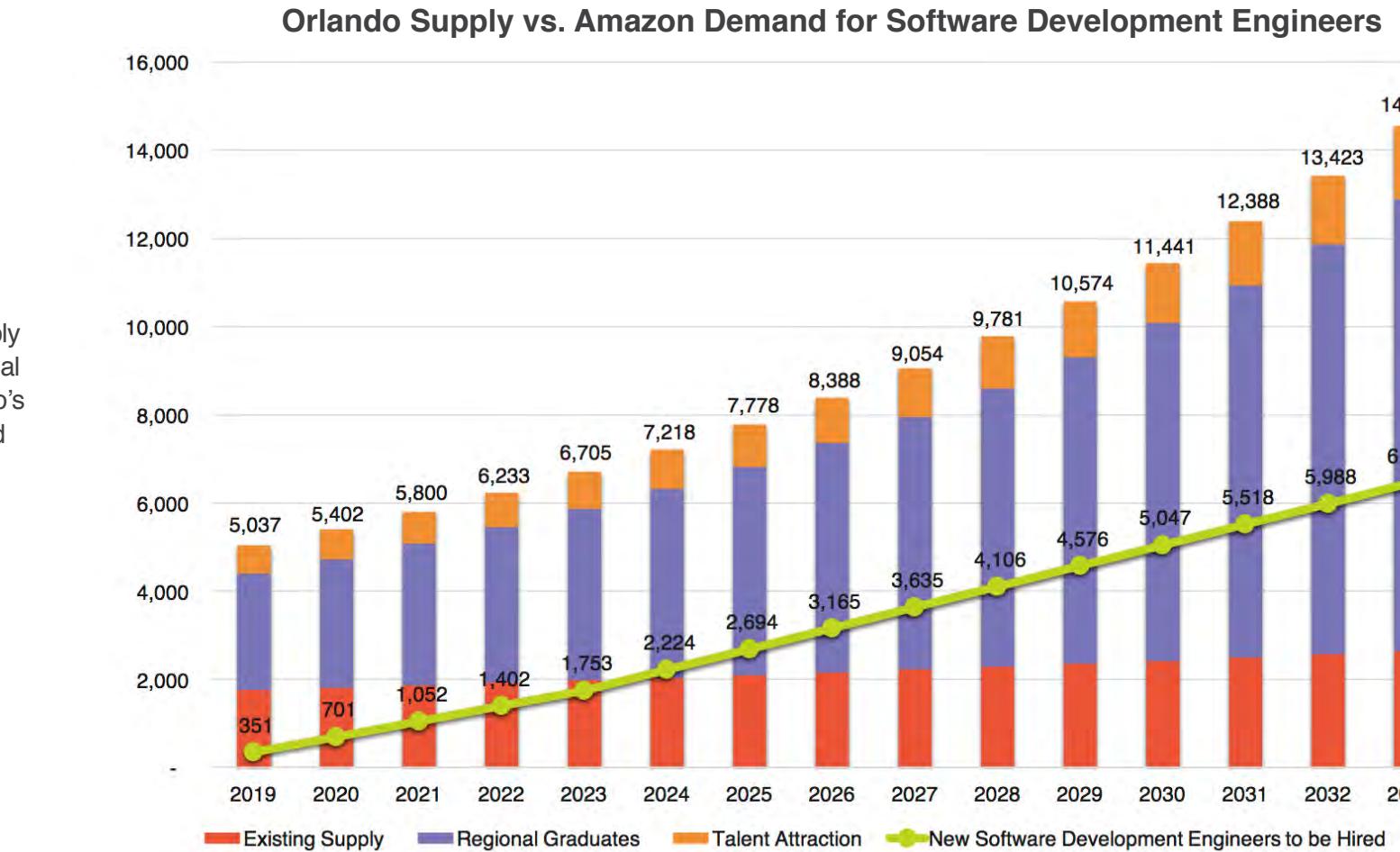
Occupation Categories	Employment (2016)	Growth 2011-2016
Software Engineers	16,183	14.7%
Engineering and Tech Talent	39,710	15.8%
Executive and Management	39,907	14.2%
Finance and Accounting	29,948	10.3%
Legal	14,350	9.3%
Administrative Services	143,185	16.3%

Source: EMSI 2017 Q3, QCEW Class of Worker, U.S Bureau of Labor Statistics

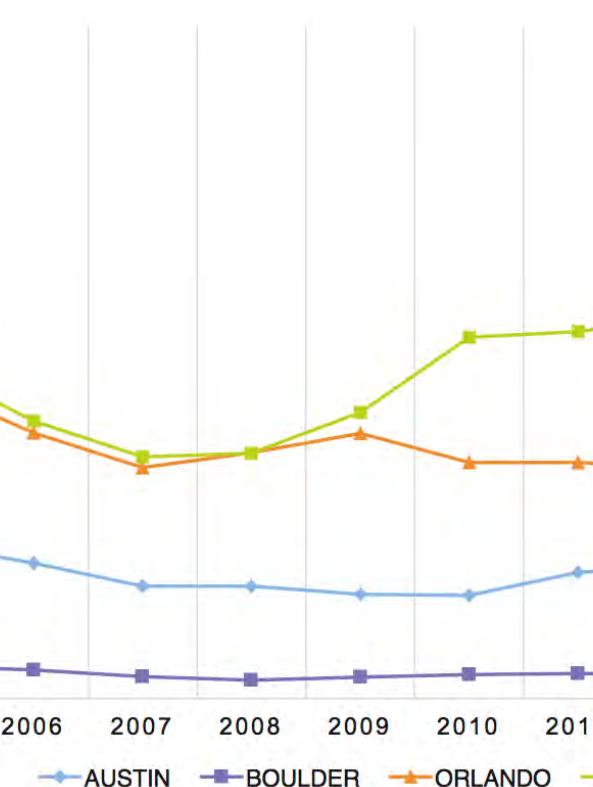


## Software Development Engineers

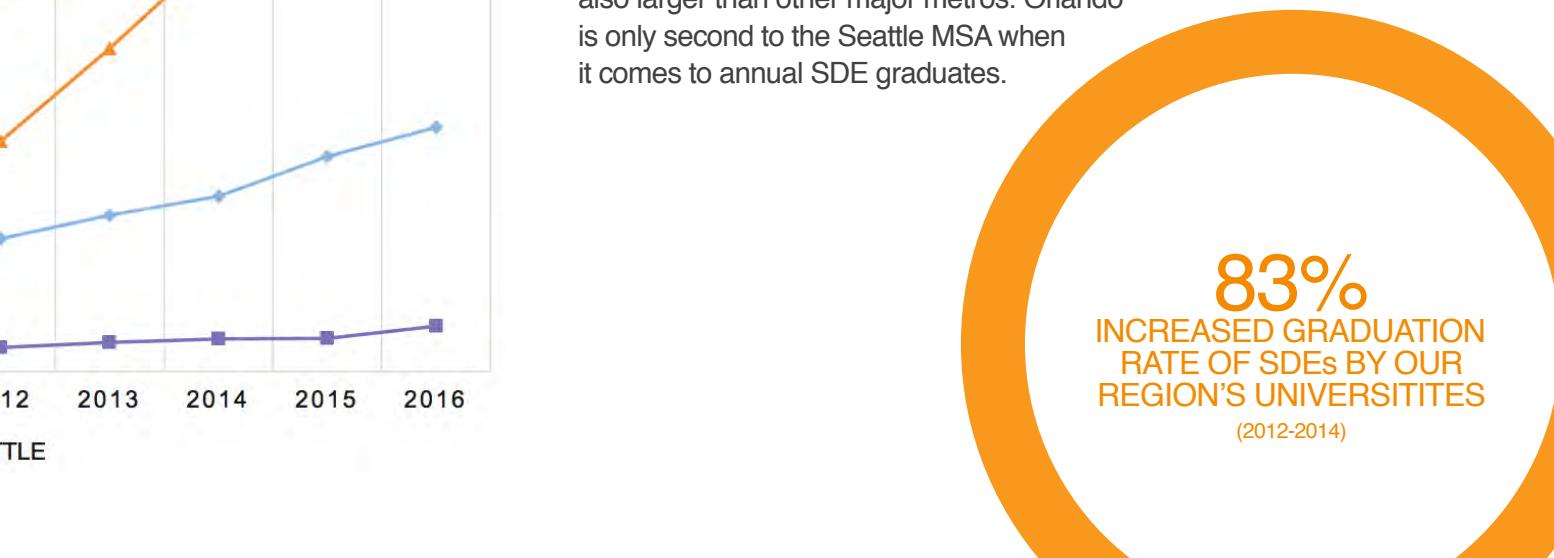
Our regional talent shed can meet your needs for SDEs from day one of project initiation in 2019. Using an estimate of square feet per worker and our knowledge of Project Golden's current workforce, we modeled the number of SDEs that the project would need through 2033, the projected end of phase three construction. We then anticipated our regional supply through to completion of phase three, incorporating our existing supply of SDEs, our regional graduates, as well as the talent we can attract to our region. As you can see below, Orlando's supply of SDEs consistently surpasses the estimated demand with room for growth beyond initial projections. Even through 2033 it would not be critical to hire from outside the Central Florida Region, giving you the flexibility to recruit the best and brightest from wherever you see fit.



## Total Degree Completions (Software Development Engineers)



Not only does Orlando have the workforce and graduates to meet the demand for SDEs through phase three of the project, Orlando's strong university system has demonstrated the potential to quickly increase production of SDEs. Between 2012 and 2014, our region's universities increased the graduation rate of SDEs by an additional 83%, the largest and fastest percent increase when compared to Austin, Boulder, and Seattle. Not only did Orlando produce SDE graduates faster than other metropolitan statistical areas (MSAs), but our region's SDE capacity is also larger than other major metros. Orlando is only second to the Seattle MSA when it comes to annual SDE graduates.



## Value-added talent

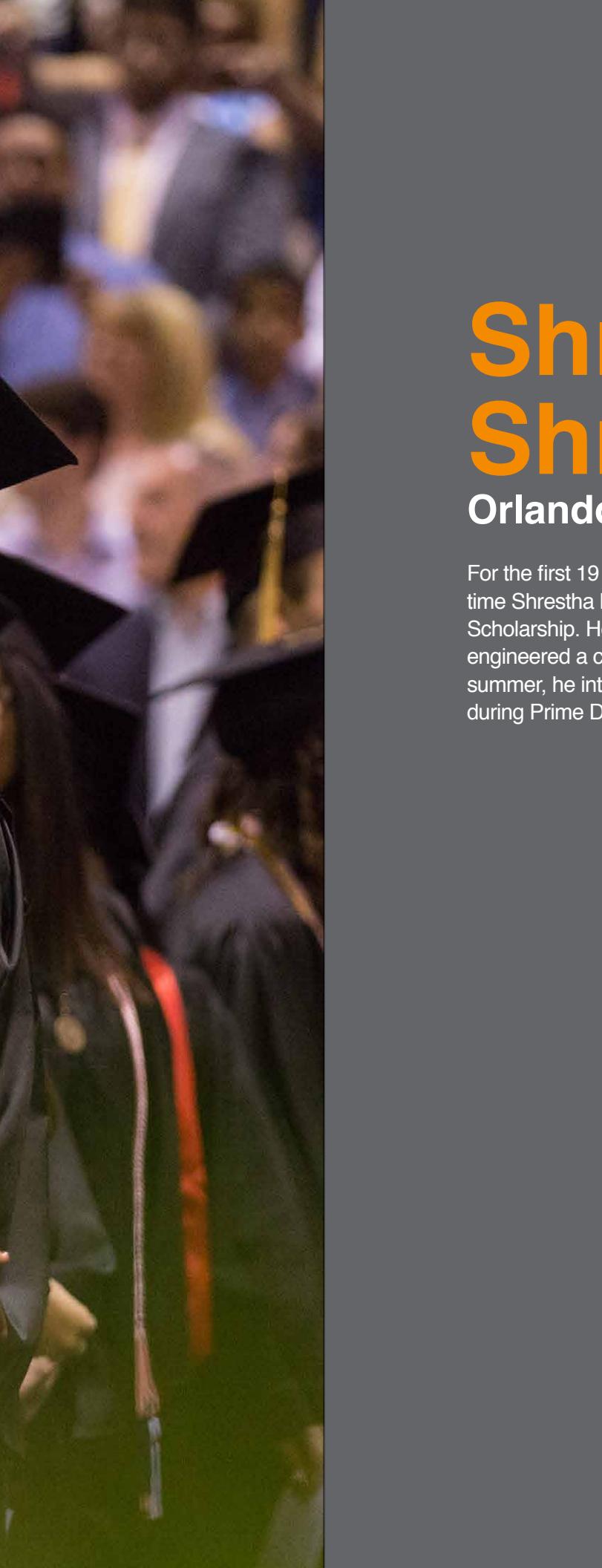
90 percent of the time, Orlando's labor is less expensive than the national average. When considering Amazon's future workforce, from accountants to software engineers, Orlando's talent comes with a lower price tag than other major metros. These include Seattle, Charlotte, Atlanta, Dallas and Chicago. In fact, cost savings in Orlando is as high as 27 percent when considering the wage of software engineers compared to those in Seattle.

Orlando's low cost of living and pro-business climate is a benefit to your payroll and your employee's paycheck. Orlandoans can achieve a higher quality of life on a smaller dime compared to other large metros.

27%  
POTENTIAL SAVINGS IN  
WAGES FOR SOFTWARE  
ENGINEERS IN ORLANDO  
COMPARED TO SEATTLE

### Wage Rate Comparison

	ORLANDO	SEATTLE	CHARLOTTE	MEMPHIS	ATLANTA	DALLAS	CHICAGO
Software Engineers	\$43.94	\$60.47	\$47.68	\$34.56	\$48.20	\$49.29	\$45.97
Engineers and Tech Talent	\$33.82	\$42.04	\$39.20	\$31.35	\$37.43	\$40.03	\$36.64
Executives and Managers	\$51.26	\$59.55	\$58.25	\$49.72	\$55.72	\$62.35	\$54.13
Accounting and Finance	\$26.54	\$33.43	\$37.85	\$27.68	\$34.20	\$30.16	\$36.71
Legal	\$54.18	\$49.03	\$49.63	\$42.33	\$51.16	\$55.19	\$52.53
Administrative Services	\$17.92	\$22.84	\$20.50	\$19.28	\$20.12	\$20.64	\$20.59



## Shree Raj Shrestha

Orlando Amazonian

For the first 19 years of his life, Shree Raj Shrestha rarely left the city of his birth. In fact, the first time Shrestha left Nepal he traveled to Orlando to interview for Rollins College's prestigious Alfond Scholarship. He earned that scholarship, and since arriving at Rollins in the fall of 2013, Shrestha has engineered a college experience that would rival any in the country in its richness and reach. Last summer, he interned at Amazon's Seattle headquarters and created an application that was used during Prime Day. Ten days after he graduated, Shrestha returned to Amazon as a software developer.



"Universal Parks & Resorts relocated its worldwide headquarters to Orlando nearly a decade ago, after being in the market for many years before that. We have found Central Florida to offer world-class quality of life, talent, training and educational systems. Local leaders have been supportive and helpful as we have continued our significant investment in the future of our business and our community."

— TRACEY STOCKWELL, SVP/CFO Universal Orlando

# We've Got Skillz

Built to win the space race and to execute Disney's futuristic fantasies, Orlando has been a tech hub for decades, drawing the boldest minds in tech talent from around the globe. Today, that talent has evolved and expanded into industries that surpassed even Walt Disney's wildest dreams, including modeling, simulation and training; data analytics; computer programming; cybersecurity; virtual, augmented and mixed reality; gaming and film/digital media.



## **Modeling, Simulation and Training (MS&T)**

UCF's Institute for Simulation and Training is an internationally recognized research institute that focuses on advancing human-centered modeling and simulation technology. One example is the new Veterans Affairs national center for medical simulation in Orlando, training VA providers from more than 150 VA hospitals and 900 clinics, who will then train their own staff—more than 300,000 of them nationwide.

## **Analytics**

Together, with an industry advisory board of more than 40 entrepreneurs and data scientists representing companies like Amazon, Lockheed Martin, IBM and Deloitte, UCF launched the state's first advanced degree that specifically addresses the growing need for big data and data analytics professionals. Similarly, UCF's data mining program—the first in the nation—enjoys industry collaborations with CitiBank, Johnson & Johnson and Darden Restaurants. UCF's Complex Adaptive Systems Laboratory has developed cutting-edge research on fraud detection for Royal Bank of Canada and has proposed innovative bot detection for online giants, including Amazon.

## **Computer Programming**

The University of Central Florida's computer programming team ranked No. 1 in the U.S. and No. 13 in the world at the World Association of Computing Machinery's International Collegiate Programming Contest, an elite contest known as the "Battle of the Brains." UCF bested UC Berkeley, M.I.T., Princeton, Cornell and many more. For 35 consecutive years, UCF has placed in the top three in its region, a record unmatched by any team in the nation.

## **Artificial Intelligence**

Orlando's role as the hub of advanced thinking in computer vision and artificial intelligence is coming into focus. Home to one of the largest computer vision research groups in the country with more than 50 researchers, UCF is a training ground for future computer vision and AI leaders—one of Amazon's principal research scientists is among them. Nearby, UF's Center for Vision, Graphics and Medical Imaging promotes basic and applied research in computer vision and vision graphics. Both UCF and University of Florida (UF) drive innovation in natural language technologies and human-centered computing that improve machine learning and broaden industry applications.

## **Cybersecurity**

Orlando's colleges and universities are proving grounds for hackers who use their powers for good. Both UCF and Embry-Riddle Aeronautical University are home to NSA and Department of Homeland Security accredited National Centers of Academic Excellence in Cyber Defense Education, and UCF is home to a National Center of Academic Excellence in Cyber Defense Research. UCF's Cyber Defense Team, Hack@UCF, has won the National Collegiate Cyber Defense Championship three times, and more than 200 members train and compete. At Stetson University, the computer science department leads an annual "ethical" hack against the university, strengthening the university's security.

## **Virtual and Augmented Reality**

Just last year, Full Sail University opened a brand new, fully equipped, state-of-the-art Virtual Reality/Augmented Reality (VR/AR) and Fabrication Lab to meet the future demand for content and applications developed specifically for virtual and augmented reality technologies.

## **Gaming**

Between FIEA, Full Sail University and The Digital Animation and Visual Effects (DAVE) School, Orlando graduates the best and brightest in game development. Orlando's Indienomicon community is one of the nation's only communities for independent game developers (Jeff might know a little something about this group). They host Indie Galactic Space Jam every year in partnership with Space Florida—the only space-themed game development conference in the world.

## **Film and Digital Media**

Full Sail uses an around-the-clock schedule that emulates the demands of the entertainment and media industries. The university also enrolls and graduates students monthly—making graduates available to the industry year-round. With assets like one of the largest motion capture stages in the Southeast at Orange Technical College and one of the nation's top-rated film programs at Valencia College, Orlando is driving innovation in the film and digital media sector.

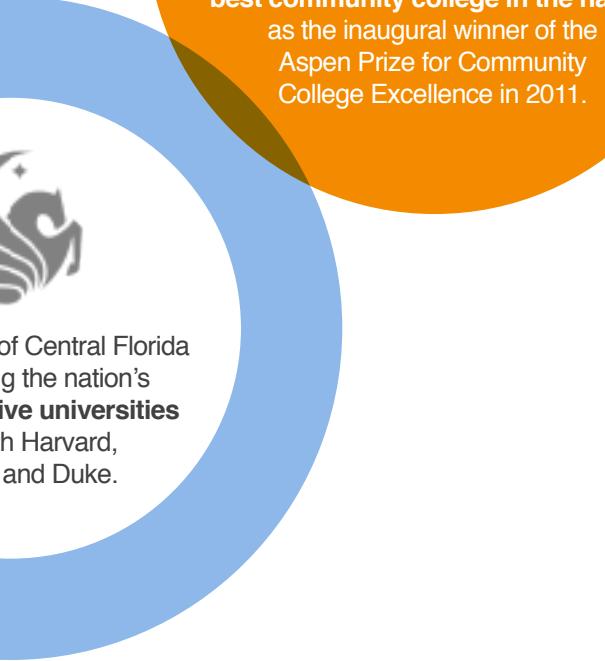
# Heather Lawrence

## Future Amazonian

UCF's Heather Lawrence wants to discover ways to teach computers to analyze and fend off cyber attacks to reduce the burden on human defenders. She's a U.S. Navy veteran and former president of the UCF Collegiate Cyber Defense Club, the popular 280-member student organization also known as Hack@UCF. She recently earned her a master's degree in computer engineering.

Lawrence served six years in the U.S. Navy as a nuclear engineering technician, including four years stationed on the aircraft carrier USS Carl Vinson (CVN-70). After returning to civilian life, she attended Valencia College then transferred to UCF where she earned a bachelor's degree in computer engineering in 2015. Lawrence said her Navy experience was an important stepping stone that prepared her for continued success in college.

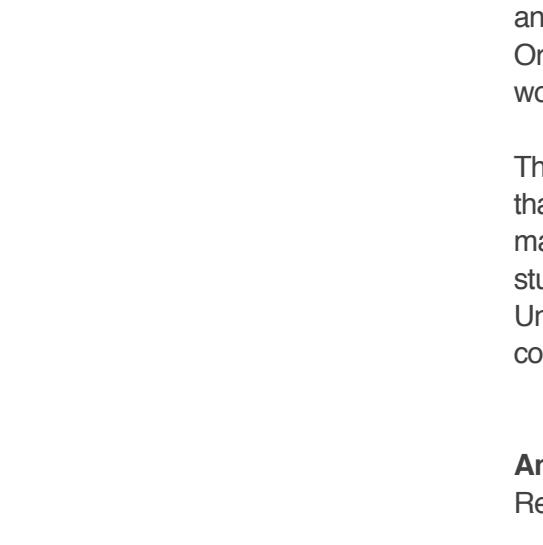
"One of the best things my mom ever did for me was get me a computer when I was 12. It was a computer built from pieces of other computers. She didn't know how to use it so I had to figure out how it worked. To be successful, the main quality people need is relentless curiosity."



The University of Central Florida ranks among the nation's most innovative universities along with Harvard, Stanford and Duke.

### No.1 IN THE NATION VALENCIA COLLEGE

Valencia College was named the best community college in the nation as the inaugural winner of the Aspen Prize for Community College Excellence in 2011.



The University of Florida is the first Florida school to break into the list of top 10 best public universities, coming in at No. 9.



For the 23rd consecutive year, Rollins College was ranked among the top two regional universities in the South in the "Best Colleges" rankings.



Alumni have worked on countless nominated and award-winning projects including The Oscars, Emmy Awards, Grammy Awards, Appy Awards, MTV Video Music Awards and The Game Awards

## Talent Pipeline: Delivering Results

The principles that power Amazon are ones shared with Orlando's diverse collection of colleges, universities and even K-12 institutions. From small, industry-specific magnet programs to large, public research universities, Orlando's breadth of institutions virtually guarantees there are academic programs and graduates for any workforce need.

There are more than 130 four-year higher education institutions within 200 miles of Orlando, graduating more than 40,000 students annually in fields that fit Amazon's needs. More than half of those graduates specialize in management, engineering, or other technological fields of study. What's more, 35 percent of the engineering students graduating within that 200-mile radius are found in Orlando's backyard at either Full Sail University, the University of Central Florida, or Rollins College. Over the last three years there have been more than 10,200 computer science graduates within 200 miles of Orlando.

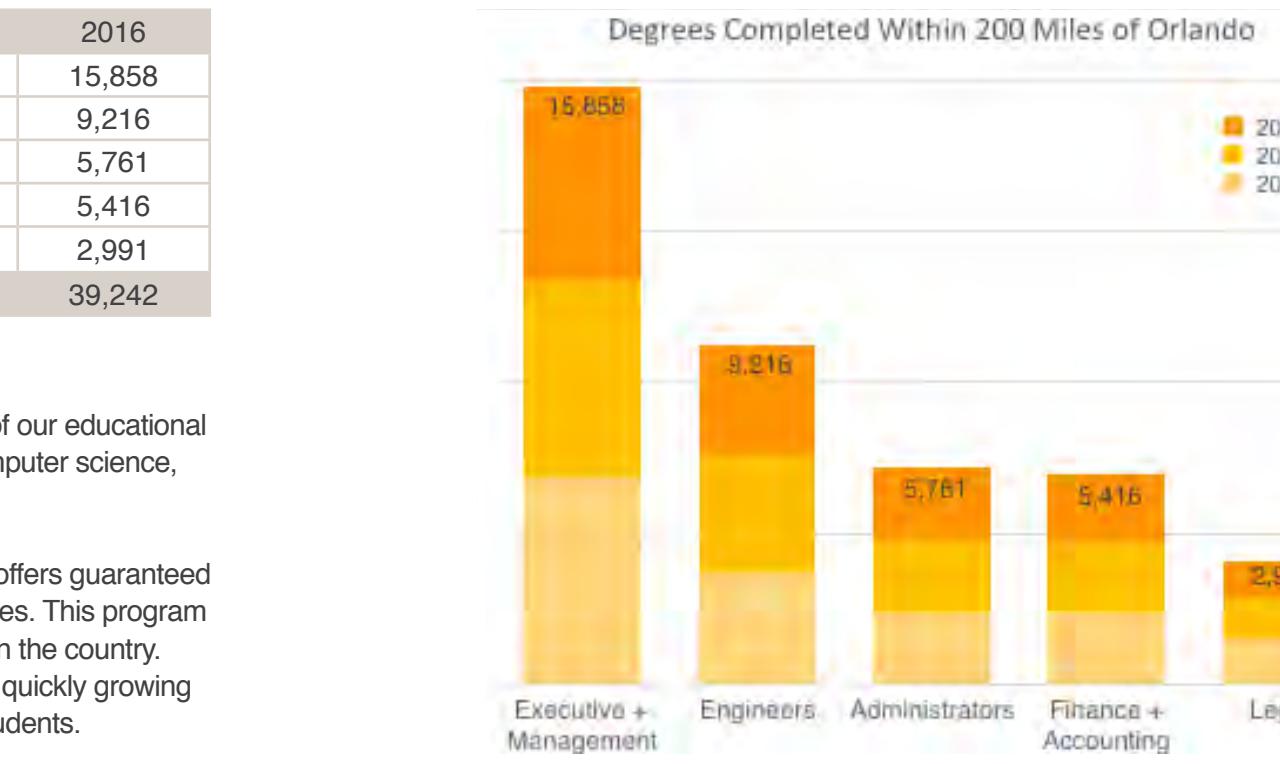
### Annual graduates within 200 miles of Orlando Relevant to Amazon job categories

Degree Category	2014	2015	2016
Executive and Management	17,099	16,499	15,858
Engineering and Other Tech Talent	9,240	9,701	9,216
Administrators	6,019	6,118	5,761
Finance and Accounting	5,972	5,932	5,416
Legal	3,806	3,487	2,991
<b>TOTAL</b>	<b>42,136</b>	<b>41,737</b>	<b>39,242</b>

National Center for Education Statistics

Some of our greatest attractions are our nationally ranked colleges and universities. The scale of our educational institutions is matched only by their excellence, with national reputations in engineering and computer science, gaming, optics and photonics and modeling and simulation.

Bolstering our talent pipeline is the University of Central Florida's DirectConnect program. UCF offers guaranteed admission to anyone graduating with an associate's degree from one to six regional state colleges. This program has been recognized as one of the most productive university-community college partnerships in the country. DirectConnect expands Central Florida students' access to higher education and diversifies our quickly growing workforce. Since its inception in 2005, 36,512 degrees have been awarded to DirectConnect students.



# STEM: Growing our Future Graduates

**K-12 schools around the region are expanding technical curricula to fill the needed talent for new-to-market organizations.**

**Lockheed Martin** invested a \$2 million multi-year grant for STEM education programs for Orange County Public Schools in 2015. The STEM curriculum is offered through Project Lead The Way (PLTW), the nation's leading provider of K-12 STEM programs.

**Northrop Grumman** created two educational initiatives, the Wekiva High School Laser Photonics Career Academy and the Laser Systems High School Involvement Partnership Program to prepare students for careers in the advanced manufacturing industry.

**The School District of Osceola County** opened the nation's first engineering and mathematics intermediate school, Discovery Intermediate, where fifth grade students enroll in relevant college and career preparatory curriculum with courses in design and modeling, automation and robotics, energy and the environment and flight and space. They also created the country's first K-12 mobile STEM lab, a 45-foot motor coach equipped with seven interactive student learning stations.

**Full Sail University** offers STEM-related online classes for K-12 students through Full Sail Labs.

**Seminole County Public Schools** is expanding computer science instruction, including a district-wide implementation of "Kindergarten Coding," introducing kindergarteners to computer programming through lessons in coding.

**Florida Virtual School** is an online school dedicated to personalized learning. Students throughout Florida and beyond can access more than 150 courses, including Advanced Placement math and sciences.

## Early Learning Coalition

Access to high-quality early child care and education is available across the Orlando region through a variety of local programs administered by the numerous Early Learning Coalitions, which have a presence in all of the major counties and communities. The Coalitions' impact early-learning in preparing the workforce of tomorrow by placing children in different learning programs, providing services to working parents and assisting families who have children with special needs.

## Magnet Programs

Throughout Orlando, magnet programs have been established within middle and 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: bioscience, finance, engineering, science, technology, healthcare and hospitality, as well as microelectronics engineering, simulation applications, aviation and aerospace engineering, global information and future technologies.

## Career Academies

Several Orlando high schools are home to career academies. These personalized learning communities provide a setting for students to learn both academic and technical curricula within the context of an industry. They allow students to prepare for college careers and to interact with the local business community. For example, Crooms Academy of Information Technology offers a rigorous academic program and technology focused coursework in the areas of multimedia design technology, computer programming and network systems technology.



Programs at Montverde Academy focus on engineering and robotics at two state-of-the-art science labs.

# Salman Mujtaba

## Future Amazonian

Coming from a modest-class family of Islamabad, Salman Mujtaba used his \$60-per-year public school education to work wonders. He passed his high school courses with straight As and ventured to the U.S. to study accounting at Stetson University. He was the first student ever to pass exemption exams for introductory financial and managerial accounting.

He graduated with his bachelor's degree with a near perfect GPA in only two and a half years, setting a record at Stetson University and receiving an award as the accounting department's outstanding senior. Salman completed an internship with TopBuild Corp. where he gained practical experience in IT controls, auditing and the basics of corporate life. He is currently pursuing a Master of Accountancy at Stetson and preparing for the Uniform CPA exam. A modest background hasn't hindered Salman from advancing in life, and he says his pursuit of success certainly won't stop here.



# Barbara Jenkins, Ed.D. Superintendent, OCPS

Superintendent Barbara Jenkins was one of four finalists for the 2017 National Superintendent of the Year. She is the current Florida Superintendent of the Year. Under her leadership, Orlando County Public Schools won the BROAD Prize for Urban Education. This award, considered the Nobel Prize for Public Education, recognizes school districts for large increases in student achievement. This includes narrowing the achievement gap among low-income students and students of color.

# Collaborative Education Ecosystem

Think Big. Insist on the Highest Standards.

The convergence of education and industry has exploded into a burgeoning tech ecosystem, where designers, entrepreneurs and investors are bound together by creative co-working spaces, incubators, accelerators and supportive civic entities. From shared curriculum design to workforce development to employee tuition discounts and more, Amazon and Orlando's education community will be partners in the truest sense.



## John Hitt, Ph.D.

President, UCF

"The University of Central Florida is known as the partnership university for a reason. We stand ready to assist Amazon in creating the workforce of tomorrow by enhancing our efforts to meet the company's needs as we've done time and again for our business community."

### Industry Driven

Ensuring a quality workforce means working side-by-side with industry to anticipate and meet future needs. That's what happened when Verizon Communications relocated its finance hub to Orlando and partnered with the University of Central Florida to launch a capstone business course on the Internet of Things. And when the Walt Disney Company asked UCF to develop a 12-month deep machine learning program to train its technical staff. Partnerships like these give businesses direct access to skilled talent both in and outside the classroom.

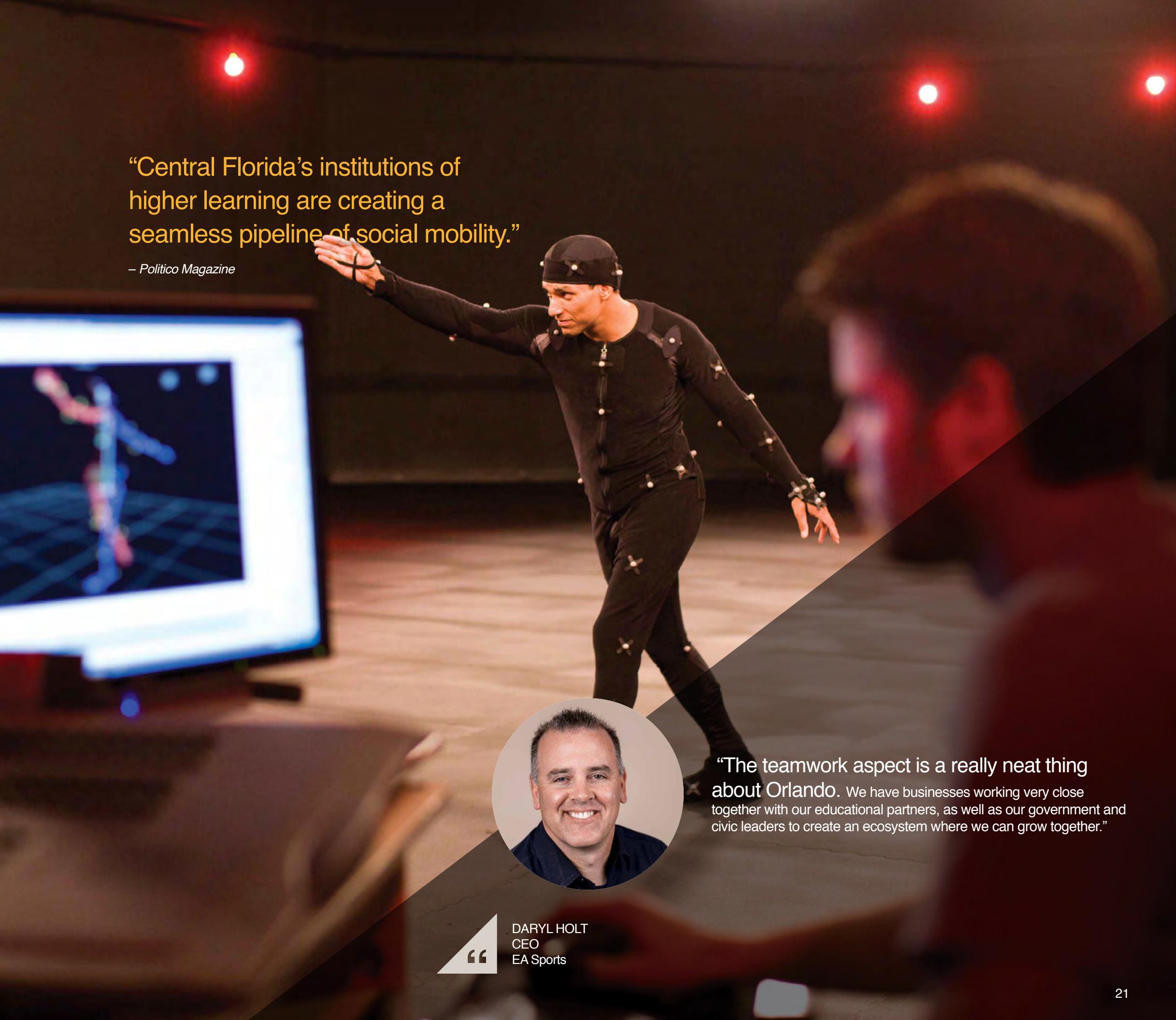
### Active Partners with Industry

Seminole State College and Valencia College have a long history of working with businesses to provide innovative workforce training programs. The colleges were instrumental in recent economic development successes that attracted Verizon and Deloitte, which collectively created nearly 3,000 new jobs in the region. Both Seminole State and Valencia modified curriculum to include additional software language education to increase software engineer graduates at UCF. Seminole State created an additional accounting certificate program that allowed Verizon personnel the necessary instruction to pass the exam for Certified Public Accountants.

- Valencia College has also worked with companies like Northrop Grumman to create a specialized program to respond to the industry demand for laser technicians.
- Located in Orlando is the Florida Interactive Entertainment Academy (FIEA), created more than a decade ago in collaboration with the City of Orlando, state of Florida and Electronic Arts to cultivate high-wage creative jobs needed by Electronic Arts Tiburon (now EA Games).

### Better Together

The Florida High Tech Corridor is an economic development initiative of three of the country's largest research institutions, the University of Central Florida, University of Florida and University of South Florida. Together, this unique partnership drives high-tech economic development through a matching grants research program, new technology degrees and workforce development and statewide resources for entrepreneurs. Since 1996, the Corridor has partnered with 350 companies on more than 1,350 projects ranging from aerospace to sustainable energy.



"Central Florida's institutions of higher learning are creating a seamless pipeline of social mobility."

— Politico Magazine



"The teamwork aspect is a really neat thing about Orlando. We have businesses working very close together with our educational partners, as well as our government and civic leaders to create an ecosystem where we can grow together."

DARYL HOLT  
CEO  
EA Sports



## Laws of Attraction

We understand that to achieve Amazon's workforce goals, we will once again harness the power of our partners to create forward-thinking talent attraction programs. Fortunately, the happiest place in the world is also one of the happiest places to work.

Named a magnet for young, diverse talent by *Forbes*, inspired talent is coming in big numbers and staying. Orlando is a wonderful place to live and a great place to build a career.

In a recent survey, 75 percent of graduates from the University of Central Florida work in the 11 counties surrounding UCF, and 90 percent plan to stay in the Florida area. That's 11,250+ graduates each year added to our regional workforce, just from one large university. And for the right job, many more will stay.

Magnet for young,  
diverse talent

11,250+

Graduates added to workforce each  
year from UCF alone

75%

Of UCF's graduates work in the 11  
counties surrounding UCF

90%

Plan to stay in the region

## Attraction Campaign: Come Back to Move Ahead

We've produced a lot of talent over the years, and that talent loves to move back to Orlando. When the opportunities arise, Orlandoans are excited to come back to a place that has grown exponentially in the last ten years. That's why our region's past talent attraction campaigns have been so successful.

The large scale and collaboration of our higher educational institutions makes it easy for us to measure former graduates and create targeted campaigns to attract and retain former graduates in our region.

When Northrup Grumman decided to locate just east of Orlando, the region's workforce development organization, CareerSource, launched a successful state-funded campaign to recruit engineers.

CareerSource Florida and Central Florida have committed to attracting the best talent possible to Orlando for Amazon.

### "Return to Florida" campaign

CareerSource will run a "Return to Florida" campaign utilizing special arrangements with Indeed and LinkedIn, as well as a customized landing page for Amazon, customized promotional material, CareerSource account manager, company liaison to coordinate activities and a variety of career fair activities. CareerSource will provide staff members to develop and implement a college career fair campaign, including staff that will travel to recruit graduates in desired engineering and technical specialties. Staff will attend career fairs and coordinate messaging with the company's online and social media recruiting strategies.

### Spouse Relocation Assistance

Employment assistance and labor market information will be made available throughout all the phases of the project. CareerSource will develop a website specific to transferring employees which may include customized recruiting materials and messaging that will become a part of the social media and online strategy for transferring employees and spouses. Team members from Orlando who are familiar with the relocation process will visit Amazon to discuss the benefits of the region, answer questions and otherwise assist employees.

### Attracting Special Populations

Customized landing pages will be designed to meet Amazon's specific talent recruitment needs, including veteran hiring. These custom landing pages will be built specific to Amazon's hiring needs with updates and improvements developed throughout all phases of the project.

### Dedicated Staff

To assist with the coordination of the company's recruitment, assessment, hiring and other needs of the company, CareerSource Central Florida will fund a staff person to liaise with the various agencies and companies participating in this proposal. Amazon will select the liaison.

Funding for dedicated campaigns for Amazon could also be available from the Florida Job Growth Grant Fund. This new incentive fund was recently approved by the Florida Legislature and signed into law to help improve public infrastructure and enhance workforce training, encouraging more businesses to locate or grow in Florida.

# Innovative Talent Pipeline Partnerships

## College and University Consortium

Our region will create a network among our universities to provide virtual internships for computer science and other majors to develop a broad pipeline of talent for Amazon, supported by jointly appointed faculty members and staff.

We will work to establish a one-year post-graduation software engineer “residency” program at Amazon or on an adjacent campus, in partnership with our universities, to tailor advanced experiential learning and coursework for high performing graduates to support Amazon’s specialized talent needs. This will also help to attract highly qualified candidates from across the country.

High quality, online learning platforms provided by Full Sail University and other university partners will help to retrain or extend Amazon’s and Orlando’s technical labor force in alignment with Amazon’s specific talent needs and opportunities. Full Sail is also prepared to support Amazon employees and/or family members with a scholarship program.

To support the relocation of Amazon employees and key new hires, UCF is prepared to offer a block of in-state tuition waivers to employees and family members as they transition to residency status. Other state universities may offer similar programs depending on need.

In addition, our statewide network of universities stands ready to answer the call to broaden the depth and scope of this consortium.

## Co-located Education Collaborations at Selected Site(s)

We will work with Amazon to establish a pre-K through Ph.D. continuing education “Academic Village” adjacent to Amazon’s selected headquarters site, offering a range of jointly developed programs aligned with the company’s mission and talent needs. The village may include:

- STEM magnet school built around inquiry-based learning and research beginning with elementary school
- Focus on entrepreneurship, including a “maker school” for creation and prototyping new ideas and products
- Creativity and executive development program partnering with industry
- Jointly appointed college and university faculty members offering customized curriculum for current and future Amazon employees
- Amazon-specific Applied Research Institute in partnership with our universities leveraging faculty research expertise and streamlined confidentiality mechanisms and joint research protocols for accelerated applied innovation



John Hitt  
President



Kent Fuchs  
President



Grant Cornwell  
President



Garry Jones  
President



Sandy Shugart  
President



Ann McGee  
President



Wendy Libby,  
Ph.D.  
President



T. Dwayne  
McCay, Ph.D.  
President



Randy Avent  
President



P. Barry Butler,  
Ph.D.  
President



Stanley Sidor, Ed.D.,  
President



Dr. James Richey  
President



Barbara Jenkins,  
Ed. D.  
Superintendent



Walt Griff  
Ed. D.  
Superintendent



# Ride, Drive, Cycle or Soar... No Pixie Dust Required

We have obsessed over the future of our region's transportation system giving you an express lane to connectivity. As the nation's only quinti-modal hub, the Orlando region accelerates connectivity options via road, sea, air, rail and even space.

Before a building comes to life, it first exists as a blueprint, a promise of things to come. This is true too of our region's transportation system. The blueprints for our current transportation system were created long ago by people who laid the groundwork for future generations to thrive. Our region's leaders have worked hard to cultivate effective partnerships to accomplish our vision of a seamless transportation system that will safely and efficiently move people and goods through a variety of transportation modes. The community's infrastructure projects are not reliant on federal funds. In fact, just 20 percent of the region's road projects are funded by the federal government, significantly lower than the national average of 80 percent.

More than **\$10 billion** of federal, state and local dollars will be invested in the region's transportation system from 2019 to 2040 (not including investments by the Central Florida Expressway Authority and Osceola County Expressway Authority for toll road maintenance, operations and expansion).

# BILLIONS

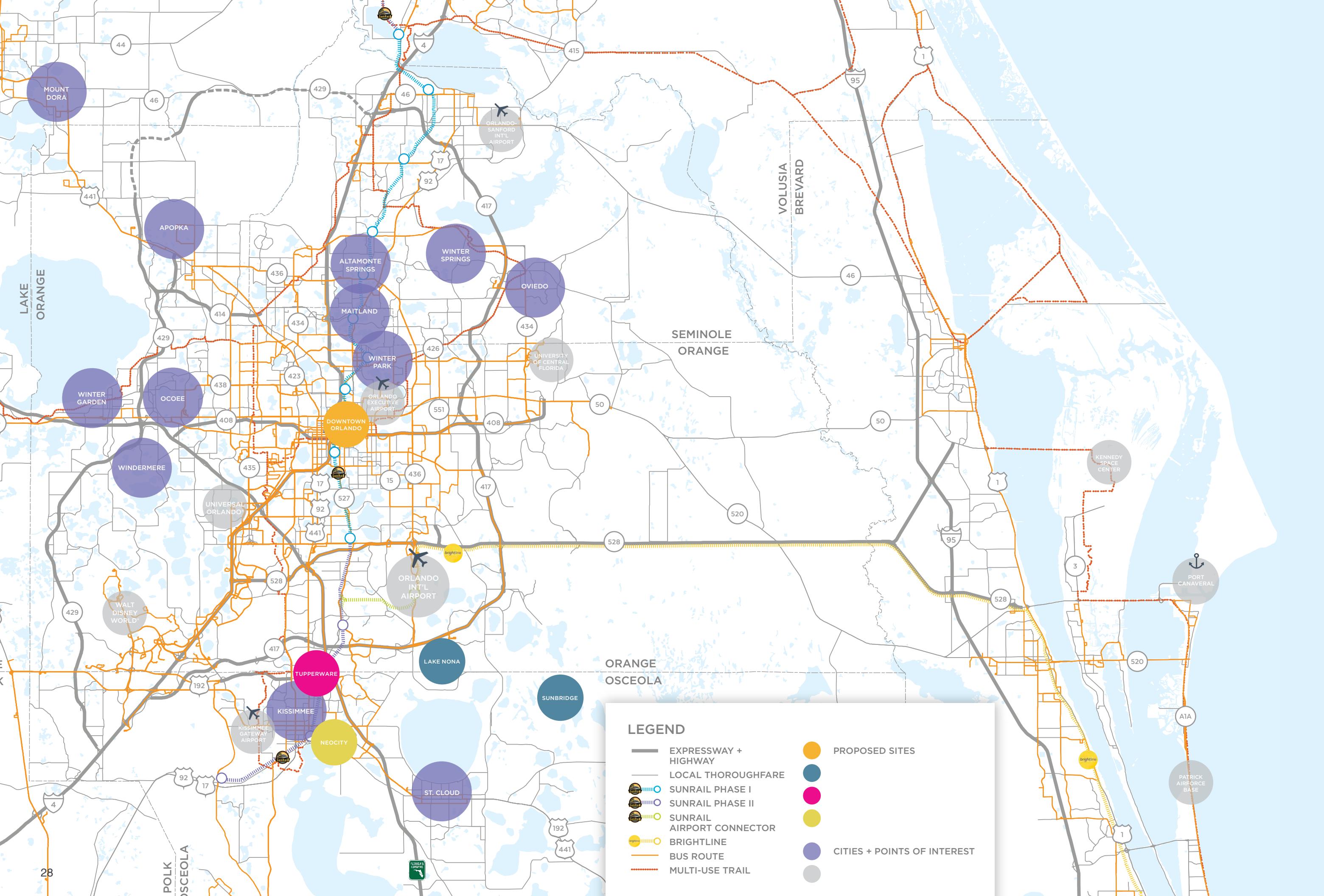
in infrastructure investments

## Urban Area Mobility Statistics

Source: 2015 Mobility Scorecard, Texas A&M Transportation Institute

URBAN AREA	YEARLY DELAY PER AUTO COMMUTER		
<u>Population over 3 million</u>	Hrs	Rank <sup>1</sup>	
Seattle	>3 million	63	7
Chicago	>3 million	61	8
Dallas	>3 million	53	11
Atlanta	>3 million	52	12
Average	>3 million	63	
<u>Population from 1 million - 3 million</u>			
Orlando	1 million - 3 million	46	27
Charlotte	1 million - 3 million	43	35
Memphis	1 million - 3 million	43	35
Average	1 million - 3 million	45	

<sup>1</sup> 1 being the most congested, 101 being the least congested



**175+ direct flights to destinations worldwide including daily flights to Seattle, New York, San Francisco Bay Area and Washington, D.C.**

Flight Frequency and Cost				
Destination	Weekly Direct Flights <sup>1</sup>	Airlines	Non-stop Distance	Average One-Way Fare <sup>2</sup>
Seattle	13	Alaska Air, Delta	2,554	\$279
New York JFK	96	American, Delta, JetBlue	989	\$162
New York LGA	72	American, Delta, JetBlue	989	\$162
San Francisco	27	Frontier Airlines, United, Virgin America	2,446	\$287
Washington DCA	70	American, JetBlue, Southwest	787	\$149
Washington IAD	41	Frontier, Southwest, United	787	\$149

Source: 1Orlando International Airport - September 2017  
2U.S. Dept. of Transportation - 4th Quarter 2016



## By Space

Why limit your connectivity to just planet Earth? Imagine controlling your entire logistics operations from a satellite fleet launched from Port Canaveral. Orlando's proximity to the space coast takes transportation out of this world.

A short drive from Orlando, this multi-use spaceport is the nation's only human launch center and current site of Blue Origin, Boeing, SpaceX, Lockheed Martin and Space Florida.

The Cape Canaveral Spaceport (CCS) is the planet's premier launch complex for sending humans and payloads to space. The CCS has served as the departure gate for every American manned mission, hundreds of advanced scientific spacecrafts and countless national security satellites. Over the past 60 years, thousands of payloads have been launched from Cape Canaveral. These include every operational Global Positioning System (GPS) satellite, hundreds of communication satellites, national-security remote sensing constellations and early warning weather systems.



## By Air

The region is home to four international airports including Orlando International, Orlando-Sanford International, Daytona Beach International, and Orlando Melbourne International. While Orlando International Airport is the 3rd largest origin and destination airport in the United States, the region is also supported by a community of general aviation airports including Orlando Executive and Kissimmee Gateway which provide complementary services and unmatched urban proximity to your HQ2.O site locations.

### Orlando International Airport

Orlando International Airport (MCO) offers more flights to more places than any other airport in Florida. In fact, Orlando International Airport provides non-stop service to more major U.S. destinations than most other cities in the nation. With more than 43 million annual passengers, Orlando International Airport is the 2nd busiest airport in Florida and 14th busiest in the nation. And though we're busy, we make it a point to take care of our travelers. Orlando International Airport ranks No.1 in customer satisfaction by J.D. Power and Associates with a score of 778.

Recently the Greater Orlando Aviation Authority (GOAA) adopted a \$3.1 billion Capital Improvement Plan (CIP) to improve the existing facility and expand the footprint to serve more passengers and destinations. Projects include North and South terminal enhancements, facility transportation improvements on automated people mover, accommodations to accept rail and increased parking.

Orlando International Airport is ideally located for cargo entering and exiting the country. Not only is it four hours closer to the rest of the U.S. compared to south Florida airports, MCO has a domestic route network that offers more flights to more U.S. destinations than any other Florida airport (and most of the rest of the U.S. non-hub airports), and a thriving cargo trucking community. Orlando is also one of the few airports in the world that can accommodate the new generation, Class 6 aircraft.

In 2013 GOAA's board unanimously approved a Sustainability Management Plan (SMP) as a roadmap to reduce dependency on fossil fuels, lower the demand for potable water, preserve natural lands, divert landfill waste to better uses and support alternative transportation. The plan solidifies GOAA's mission to responsibly construct and operate the airport facilities to ensure future generations will enjoy the same environment that we experience today.

### Orlando Sanford International Airport

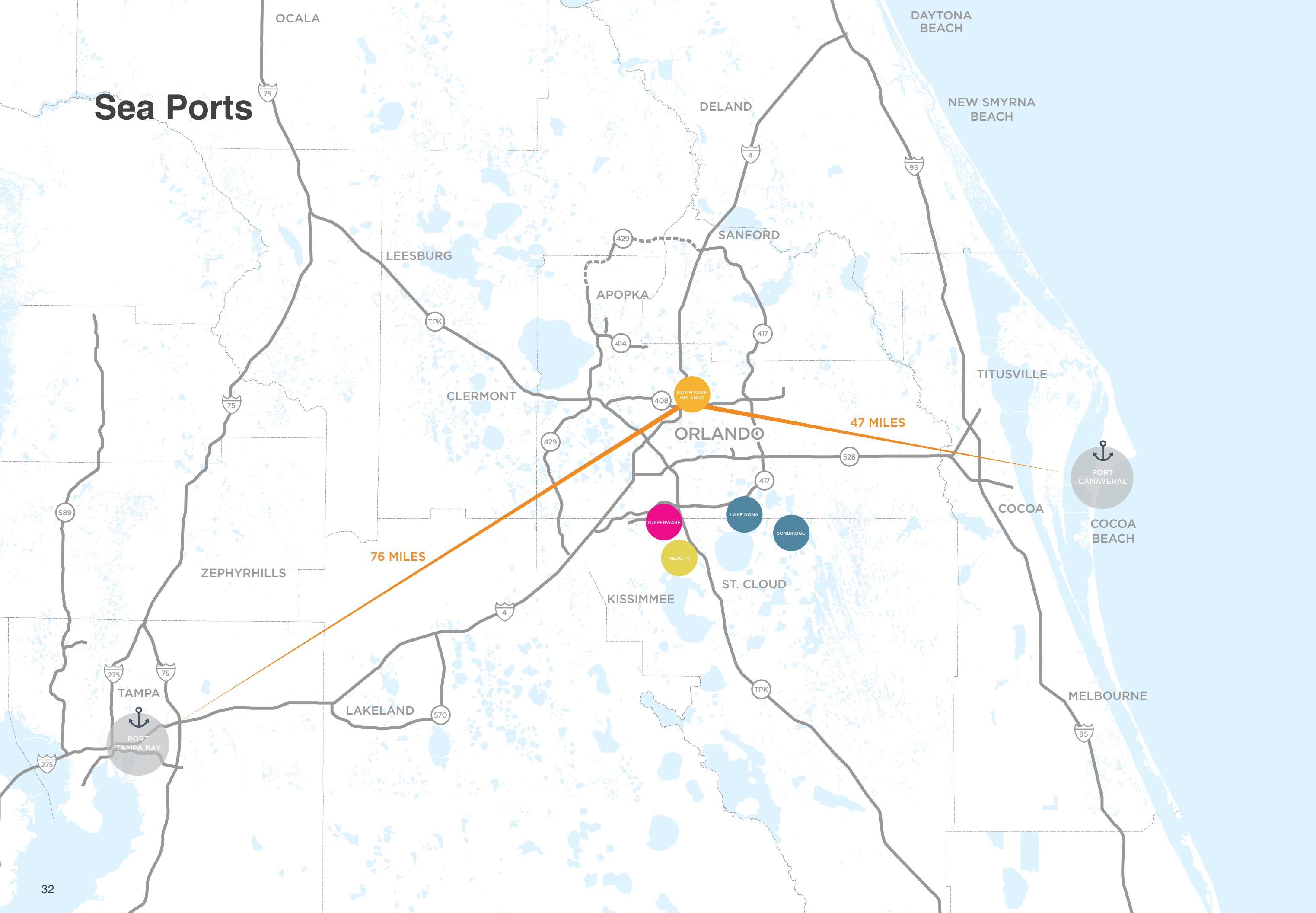
Employees and executives can enjoy a unique selection of destinations at the nation's most affordable airport, Orlando Sanford International Airport (SFB).

### Orlando Executive Airport

Conveniently located only three miles from the business and financial center of Central Florida, Orlando Executive Airport (OEA) is the perfect flight path for the corporate traveler. OEA provides 24-hour service through two fixed base operators, an FAA air traffic control tower and full ILS capability. Orlando International, Orlando Sanford International, Kissimmee Regional and Leesburg International airports all have capabilities for executive jet service.

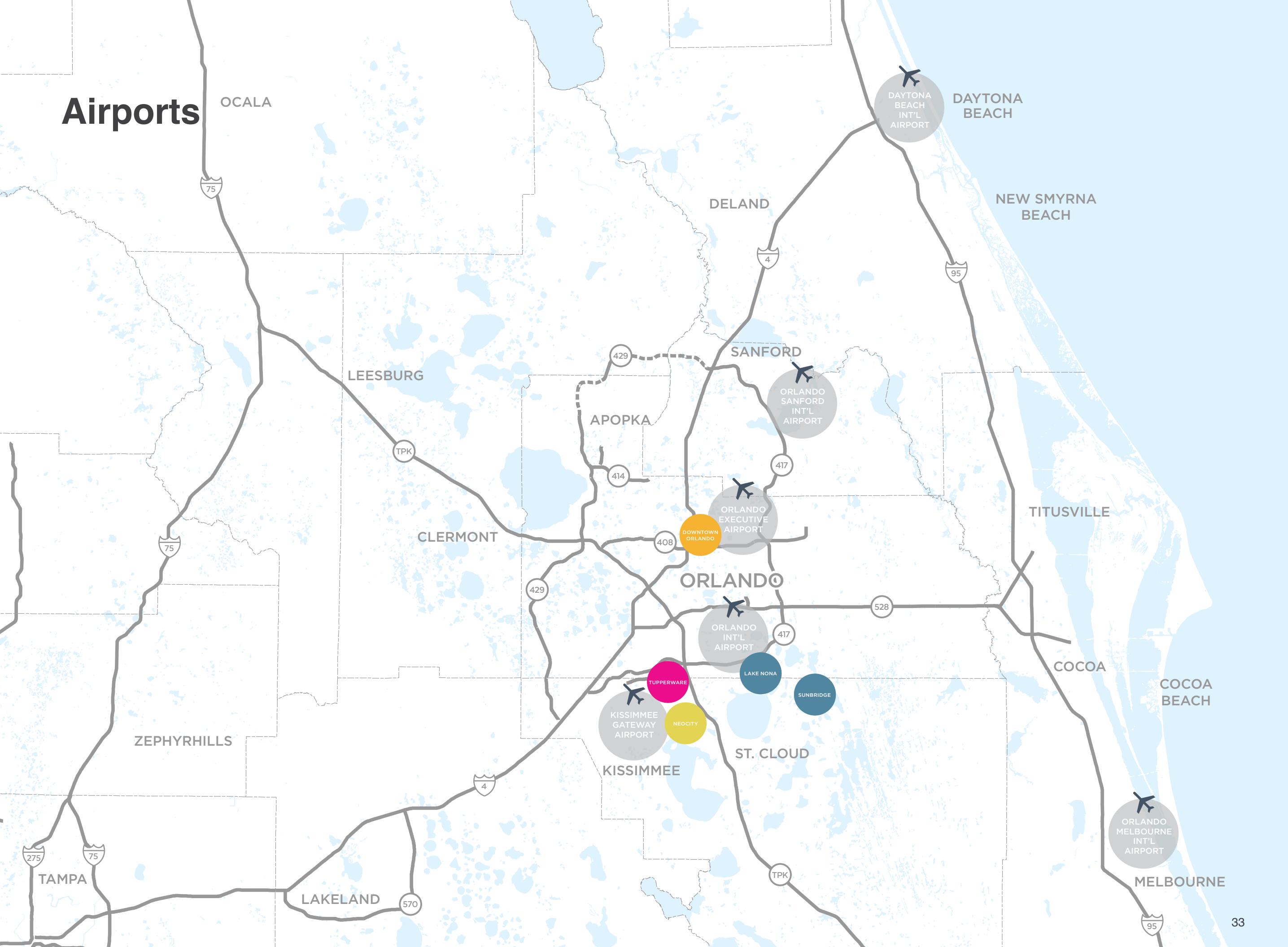
No. 1  
IN CUSTOMER  
SATISFACTION BY  
J.D. POWER AND  
ASSOCIATES

# Sea Ports



# **orts**

## OCALA





## By Sea

Port Canaveral and the Atlantic Ocean are within an hour's drive from downtown Orlando, putting European, North American and South American markets at our gateway. Port Canaveral serves four million cruise passengers and handles five and a half tons of cargo through its state-of-the-art terminals, making it the second busiest cruise, cargo and naval facility in the world. 80 percent of the port's revenue is generated by cruise lines, with visitors traveling from all over to enjoy both a cruise vacation and Orlando's many other attractions.

Several multi-phased improvements are planned or currently underway, including gantry crane acquisitions, terminal yard expansions and infrastructure development for increased capacity of up to 12 million tons. Recently completed multimodal projects, including exclusive truck lanes to and from I-4 and on-site rail spurs greatly enhance the port's connectivity to customers in west Central Florida and beyond.

**5.5M  
TONS OF CARGO  
THROUGH PORT  
CANAVERAL**

**4M  
PASSENGERS  
THROUGH PORT  
CANAVERAL**

## By Rail

As with Florida's first railroads in the 1830s, today's rail initiatives are opening Florida to new industry, expanding the tourism economy and revitalizing residential and commercial areas with optimal connectivity and convenience. There's also the invaluable gift of time. Rail travelers can use their commutes to catch up on work, reading, a TV show or some ZZZs.

### SunRail

SunRail is Orlando's commuter rail. Initial service began in May 2014 serving 12 stations along 31 miles of track. Phase 2 will include 17 stations along 61 miles of track connecting DeBary in Volusia County to Poinciana in Osceola County and will be completed by the summer of 2018. The trains consist of one to three cars and have the capacity to carry more than 150 passengers in each car. Some stations provide connections to Amtrak and LYMMO in downtown Orlando. Phase 3 includes an additional connection to Orlando International Airport's future intermodal terminal. Employers can offer "Commuter Tax Benefits," saving companies payroll-related taxes, as well as saving employees money on federal income taxes.

### Brightline

Brightline is a privately funded high-speed rail service that will provide service from Miami to Orlando. The new express train service will connect the downtowns of Miami, Fort Lauderdale and West Palm Beach, with a Phase II expansion to Orlando by 2020.

**150  
PASSENGERS  
PER CAR**

## By LYNX

LYNX Central Florida Regional Transportation Authority provides 72 local fixed bus routes (or links), 14 NeighborLinks, four Bus Rapid Transit (BRT) routes referred to as LYMMO, four FastLinks, contracted express bus service and paratransit and commuter assistance vanpools. LYNX also operates express bus routes, providing access to downtown Kissimmee and Orlando International Airport from the Sand Lake SunRail Station. LYNX was the first transit agency in the nation to build, operate and blend its own biodiesel fueling station, and is currently in the process of converting its fleet to compressed natural gas (CNG). More recently, the public transit agency established the LYNX Forward initiative to reimagine transit services in the region. LYNX is further committed to reimagining everything from routes, future light rail and other premium transit line implementation to meet Amazon's needs.

### LYMMO

LYMMO is a 9.6-mile BRT service circulating in downtown Orlando operated by LYNX with funding provided by the City of Orlando. Celebrating 20 years of service, LYMMO's success has led LYNX and the City of Orlando to embark on an expansion of LYMMO, serving destinations farther east and west in downtown including Thornton Park, Parramore, the Amway Center, Camping World Stadium, the North Quarter and Creative Village. These expansions are envisioned to operate with automated electric buses.

### ACCESS LYNX

ACCESS LYNX is a shared ride para-transit, door-to-door transportation service. LYNX has been designated as the para-transit coordinator for Orange, Osceola and Seminole counties since October 1992. It provides sponsored and non-sponsored transportation to Transportation Disadvantaged individuals with a mission to provide safe, cost effective transportation to those who, because of disability, age or income, are unable to provide their own transportation. The service provides 2,000+ scheduled passenger trips per day using vehicles specially equipped for individuals with various disabilities. This service far exceeds national standards providing service 24 hours a day, seven days a week with no boundaries in the service area.



## By Car

Orlando sits at the crossroads of Florida's highway network, serving as a hub for distribution and core circulator for residents and visitors. While the region has many transportation improvements planned for construction, there are a few significant projects that will transform transportation and quality of life in Central Florida. These projects come in many forms but they all share two characteristics—large scale and regional impact.

### I-4 Ultimate Improvement Project

Often called the backbone of our transportation system, I-4 is now four years into a complete transformation scheduled for 2021. As the largest transportation infrastructure project in Florida's history, the I-4 Ultimate Improvement Project encompasses a 21-mile stretch. Initiated through a public-private partnership, a team (I-4 Mobility Partners) was selected in 2014 to enter a 40-year contract with the Florida Department of Transportation (FDOT) to design, construct, finance, operate and maintain the I-4 Ultimate corridor. This project will completely reconstruct existing lanes, rebuild 15 major interchanges, build more than 140 bridges and add four express lanes (two in each direction) with managed access points and dynamic pricing. During construction, I-4 Ultimate will maintain the same number of lanes that existed pre-construction during peak travel times.

I-4 ULTIMATE  
IS THE LARGEST  
TRANSPORTATION  
INFRASTRUCTURE  
PROJECT IN  
FLORIDA'S HISTORY

### Award-Winning Design and Construction

The I-4 Ultimate project earned the state's first prestigious Envision Platinum recognition from the Institute for Sustainable Infrastructure (ISI) for its sustainability efforts of environmental, social and economic impact on the community. The project has minimized environmental impacts, including relocating protected wildlife, using efficient machinery, controlling stormwater runoff, planting non-invasive vegetation and recycling 99 percent of the concrete and steel removed from roads and bridges. The project also facilitates the use of alternative transportation by integrating rail projects and improving pedestrian crossings and connections with bike trails.

### Beyond the Ultimate

There are plans to extend this same express lane concept beyond the current 21-mile project. FDOT is evaluating five additional projects that would provide 60 miles of reliable transportation options through the heart of Central Florida.

### Wekiva Parkway

The \$1.7 billion Wekiva Parkway completes a beltway around metropolitan Orlando with a 25-mile toll road through parts of Orange, Seminole, and Lake Counties. The entire parkway is expected to be complete in 2021.

### Central Florida Expressway Authority

The Central Florida Expressway Authority (CFX) includes 109 centerline miles and 767 lane miles (including ramps) of limited access expressways and when CFX completes its portion of the Wekiva Parkway in 2018, the system will grow to more than 120 centerline and 811 lane miles. A fiber optic network (FON) of more than 200 miles runs on both sides of the system in a route-redundancy configuration along all system facilities.

### Osceola County Expressway Authority

The Osceola County Expressway Authority began looking toward 2040 with its first master plan. To prepare for significant growth in Osceola County, the authority targeted four expressway segments, forming a 57-mile ring around the county's interior urban growth boundary. The first segment of Poinciana Parkway was recently completed.



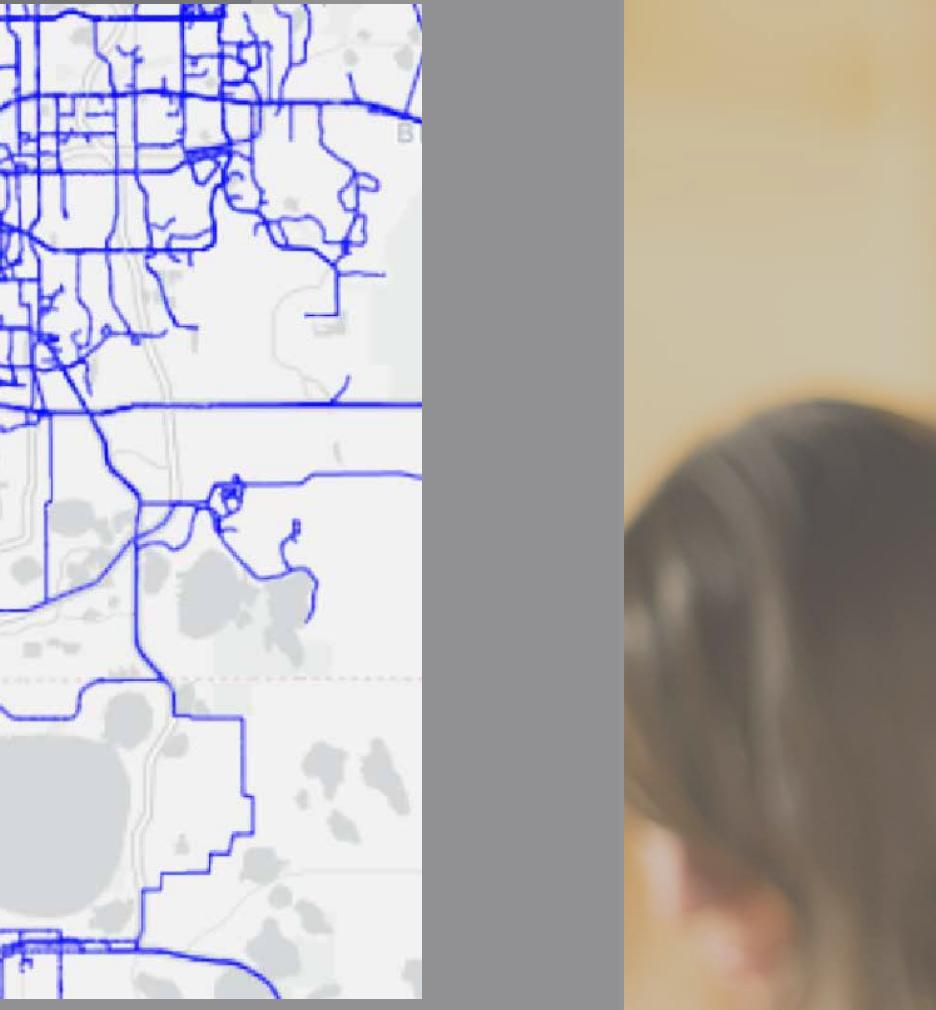
# Digital Infrastructure: *We're Lit*

Osceola County is currently exploring the next generation, high bandwidth, low latency 10Gbps+ fiber optic network at NeoCity. A high bandwidth low latency 10Gbps+ fiber optic network delivers virtually unlimited network speeds that begin at 1,000X the speeds available on traditional networks today, with low latency which allows data to be transmitted in real time.

In Lake Nona, Tavistock created Dais to bring Lake Nona residence and businesses a high bandwidth capacity infrastructure sufficient to deliver internet at the rapid speed of ten gigabit per second – 200 times faster than the average U.S. internet connection speed. This unprecedented rate has made Lake Nona the first gigabit community in the state of Florida.



“  
BUDDY  
DYER  
Mayor  
City of Orlando



“We have set aggressive goals to reduce our environmental impact through our Green Works Orlando initiative. Siemens' CyPT tool will help us to reach those goals by identifying innovative technologies that can reduce our greenhouse gas emissions, make our buildings more energy efficient, transform our transportation and mobility options, and more.”





# BOOM TOWN

No. 3  
MILLENNIAL  
HOME BUYING  
HOT SPOT

No. 3  
BEST MAGNET  
FOR MILLENNIALS  
(FORBES)

No. 3  
FASTEAST GROWING  
MILLENNIAL  
POPULATION (2017)

## Millennial Migration Magnet

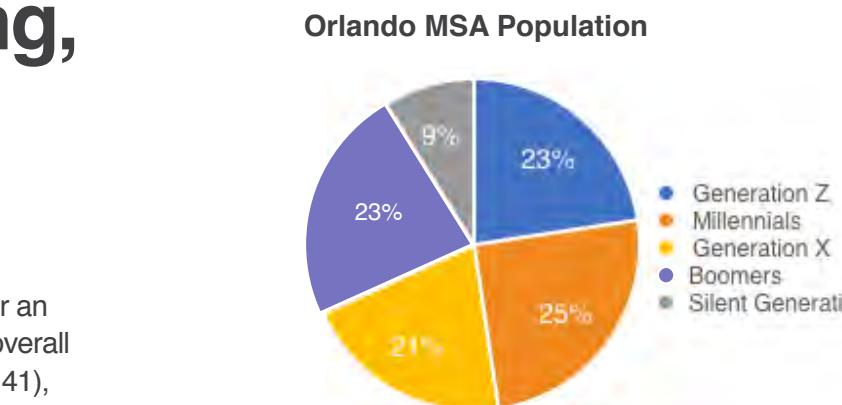
Attracting a culture that is young, entrepreneurial, inclusive and sustainable

Beyond Orlando's world-famous theme parks exists a booming cultural infrastructure, ripe for an ever-growing population of millennials who revel in all that Orlando offers. Despite Florida's overall retiree population, the average age in Orlando is 37 (much lower than the state's average of 41), positioning our area as a refreshing new home base for national trendsetters and civic-minded social entrepreneurs with their sights set on making an impact on the place they've chosen to call home.

- Orlando was ranked the No. 3 top millennial home buying hot spot by *Realtor.com*
- Third-fastest-growing millennial population in the country (of large metros), outpacing Austin, Seattle and Atlanta
- Orlando was recognized as the third best magnet for millennials by *Forbes Magazine*

"Orlando has been the best 'living lab' that any entrepreneur, starter or emerging professional could ever imagine. Just over the last five years, I've witnessed Orlando transform into a hub for innovators, change-agents and active citizens working to shape our city into one of the best in the world, and has empowered so many people to use their talents and expertise to make Orlando a world-class destination, not just for hospitality and entertainment, but for arts and culture, sustainability, tech, and entrepreneurship to name a few."

CHRIS CASTRO  
UCF Graduate  
Director of Sustainability  
City of Orlando



25%  
Of residents are Millennials

23%  
Are Generation Z



## #OrlandoPride #LoveOrlando #OrlandoUnited **#ThisIsOrlando**

As one of the world's top tourism destinations, Orlando is no stranger to people of different backgrounds, ethnicities, religions, nationalities, abilities and gender identities. Orlando is a community built on inclusion; by welcoming so many new students and residents from all over the world, the city has grown into the diverse melting pot that it is today.

The numbers speak for themselves. Between 2010 and 2015, Orlando experienced a 21.5 percent growth rate in its minority population, placing Orlando fifth in minority growth in the U.S. ahead of more populous cities like Miami, New York and Portland. Orlando also has the second fastest-growing Spanish-speaking population among large metros in the country.

At its core, Orlando is a warm and welcoming region made stronger by its people who bring unique ideas, backgrounds and perspectives. Orlando is not just a region filled with diversity—it's a place where anyone can thrive.

The City of Orlando scored the highest marks for equality in the Human Rights Campaign's Municipal Equality Index (MEI) for the last three years in a row. This national report measures how 506 cities treat its LGBTQ residents, including municipal employment policies, health coverage, anti-discrimination laws and policies and reports of hate crimes.



"As an immigrant, I wasn't sure how accepting business leaders in this community would be to a gay Latino. But what I've found is that Orlando is as multicultural as the millions who visit us every year and the business leadership is as diverse as the community."

“

CARLOS CARBONELL  
President and CEO  
Echo Interaction Group  
President, Orlando Tech Association

## Entrepreneurial Spirit

The region's ever-growing class of creative technologists is bringing Orlando global recognition as a place to build, a place to play, a vibrant, inclusive community to call home, and an inspiring place to work. This diversity is represented by an explosion of growth in the local startup community, with a range of skillful experts finding new ways to use technology. Many are doing so with an emphasis on social good and sustainability.

UniKey Technologies, Inc., a graduate of the University of Central Florida Business Incubation Program, is a leader in smart access control technology. Phil Dumas, founder and CEO of UniKey, said his company has raised more than \$20 million since it started as an Incubator client. UniKey is now expanding into the commercial IoT industries through recent partnerships with Nortek and Grosvenor.

Based in Orlando, Fattmerchant, is revolutionizing the payment technology industry. Other Orlando startups are also taking on the fintech industry. Abe.ai designs artificial intelligence-based software and mobile products for the banking industry. Abe.ai was recently selected to participate in the prestigious Techstars accelerator program.

Orlando is at the forefront of the conversation about how social entrepreneurship can improve communities and solve global challenges. Leading this conversation is local entrepreneur Shawn Seipler. Shawn built a social enterprise, Clean the World, to recycle hotel soap products to help prevent millions of hygiene-related deaths each year.

300  
Emerging companies

600  
Entrepreneurs have been assisted by the nationally recognized UCF incubation program and venture accelerator

No. 3  
in startup density  
The Kauffman Index, 2017



SUNEERA  
MADHANI  
CEO  
Fattmerchant

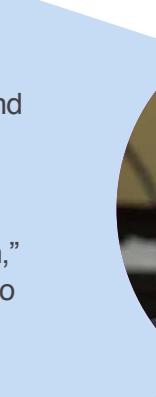
“My experience starting my company in Orlando has been incredible. The community truly wants to see you grow and succeed, and having that kind of support from my peers has been invaluable to Fattmerchant’s success. Not to mention the talent, especially on the technology side, is amazing in Orlando. Financial technology is becoming increasingly innovative, and having the right team to be able to lead the charge in new payment tech and innovation is so important. I can’t wait to continue to grow and create jobs for the Central Florida area.”

## Limbless Solutions

When Albert Manero was a kid, his parents taught him the importance of making the world a better place. “They always encouraged me to use my education to help others and to dream big dreams,” he says. “Now I want to inspire others to help engineer hope for the world.”

That inspiration has taken form in Limbless Solutions, a nonprofit devoted to bringing 3-D printed bionic arms and hands to children at no cost to their families. Leading a multidisciplinary group of volunteer UCF students and alumni, Manero has designed and donated battery-operated devices to young people across the United States, and given the plans to international groups so they can assist children in their regions.

Limbless Solutions gained national attention when actor Robert Downey, Jr. helped deliver an updated Iron Man-themed arm to 7-year-old Alex Pring, the recipient of the group’s first creation in July 2014. The video of the meeting, which was a part of Microsoft’s Collective Project, has garnered more than 10 million views on YouTube and earned the Limbless team international notoriety.



“I have learned how to ‘dream big dreams’ and about global innovation,” Manero says. “I want to push the limits of design, engineering and art to make people say ‘wow.’” —ALBERT MANERO President, Limbless Solutions

The Limbless team has also developed an inexpensive device that allows quadriplegics to control their wheelchairs using only small facial movements.



## Sustainagility

Orlando is paving the way for a more eco-friendly and sustainable future. In fact, Orlando is ranked as one of the greenest cities in America by *EcoWatch*. Orlando is a top city for urban farming (*Redfin* 2016) and is one of only five cities awarded the Smart City Council Readiness Challenge grant in 2017.

### Smart city of the future

As part of the 2017 Smart City Council Readiness Challenge, Orlando will receive hands on guidance from the Smart Cities Council, a network of leading companies advised by top universities, laboratories, and standards bodies, to develop a comprehensive smart city plan. Orlando and Orange County plan to implement smart transportation solutions that can enhance the visitor experience while improving safety and reducing congestion, including the integration of sensors and advanced communications systems into public safety programs.

OSCEOLA ENERGY INITIATIVE RECEIVED A **\$2.36 MILLION** GRANT FROM THE U.S. DEPARTMENT OF ENERGY

THERE ARE MORE THAN 285 ELECTRIC VEHICLE CHARGING STATIONS WITHIN A 70-MILE RADIUS OF DOWNTOWN.

IN 2017, ORLANDO PLEDGED TO RUN 100 PERCENT ON RENEWABLE ENERGY IN ALL CITY OPERATIONS BY 2030 AND 100 PERCENT CITYWIDE BY 2050.

### Sustainable growth

The City of Orlando is working to be one of the most sustainable cities in America through implementing its Green Works Community Action Plan. This plan identifies ambitious goals and actionable strategies in seven distinct focus areas that ensure protection of its natural resources and a thriving, livable city for current and future residents.

### Circular Economy

In true Orlando fashion, we are the testing grounds for a scalable model designed to improve recycling and recovery rates. Orlando was chosen this year by the U.S. Chamber of Commerce Foundation as the pilot city for its Beyond 34 project. Beyond 34 is a first-of-its-kind public-private sector partnership to help break through the current national recycling barrier of 34 percent.



“

TERESA JACOBS

Mayor

Orange County

### Slow food + farming movement

Orlando has developed a unique and progressive urban farming movement. Ranked in the top five best cities for urban farming, several Orlando organizations are working to reshape the city's food system, including Fleet Farming and Growing Orlando.



“We are committed to leaving a legacy for future generations that will provide them with a quality of life that is even better than today. Our sustainability plan will lead us in achieving a more diverse, resilient and thriving economy while protecting and enhancing our cultural and environmental legacy for generations to come.”



# A unique quality of life

By now, you likely see a theme...expect the unexpected of Orlando. Constantly innovating and forever imagining, this region's unique cultural experiences include everything from the fantastically far-out Fringe Festival and Indie Galactic Space Jam to awe-inspiring bioluminescent kayaking under the stars and curated conversational dinner party projects.

In recent years, Orlando has made substantial investments in the creation of global powerhouse attractions – we don't mean rollercoasters.

- Dr. Phillips Center for the Performing Arts (LEED registered) is the centerpiece of a **nine-acre mixed use project** in Downtown Orlando featuring an iconic 65' cantilevered steel canopy, **2,700 seat main theater**, **300 seat community theater** and activated public lawn. *Southern Living* recognized it as #10 of the 50 Best Places in the South Now.
- Camping World Stadium (LEED silver) hosts a variety of major sports and entertainment events, including NCAA bowl games, the NFL Pro Bowl and this year's record-breaking WrestleMania.
- Amway Center (LEED Gold) is an award-winning venue and home to the Orlando Magic, Orlando Solar Bears and the host venue of many NCAA basketball tournaments and concerts.
- Orlando City Stadium (Pursuing LEED certification) is our **brand new 25,000+ seat soccer stadium**. Home to the MLS Orlando City Lions and the NWSL Orlando Pride and where you'll find a sea of purple fans rivaling Seattle's own.

Despite our unstoppable growth and continued advancement, one thing remains unchanged: our friendly, neighborly spirit that makes Orlando one of the easiest places to network and grow. Just ask around.

In Orlando, newbies and natives are welcomed with open arms and encouraged to take part in philanthropy and organizations that are making a difference. Pick a cause, pick a preferred method of contributing and you'll find one of many opportunities to become engaged. From Chambers of Commerce focused on building a diverse business climate to the Orlando Tech Association hosting one of the largest tech meet-ups in the Southeast to your school's PTA – Orlando is a place that believes the investments we make in our communities today accumulate invaluable interest in our future.



BEST CITY FOR  
RECREATION  
TWO YEARS IN A ROW  
(Wallethub 2017 & 2016)

## Housing

Orlando is one of the best cities in the country for investing in residential real estate in 2017, according to *Forbes*. The magazine named Orlando the third-best U.S. market in which to buy a home this year, citing the city's growth in population and jobs as factors in the ranking.

Orlando leads the way in terms of variables such as housing starts; growth in population, employment and resident income; mortgage lending; building permits; new-home sales; and home prices. On the strength of those factors, housing availability, affordability and diversity are widely apparent. Homeowners save significantly by living in Orlando.

The region's housing options and neighborhoods span a broad spectrum, from soaring urban highrises that touch the sky to sprawling, rural estates where four-legged family members are horses. Homes of every description – one-bedroom condos, four-story brownstones, craftsman bungalows, and lavish multi-acre estates – are plentiful and affordable.

Affordable housing is a top priority for the region with significant investments being made in developing and rehabbing quality, affordable housing for all. Creative Village and West Lakes have mixed-income apartment communities underway that answer the demands of a holistic housing market that supports all income levels.

Choosing a neighborhood in Orlando may be the hardest decision your team will make in this HQ2.O journey. It's akin to asking someone to choose their favorite kid – they are all unique, filled with personality, and are being raised to thrive and inspire the next generation. This handful of neighborhoods help share part of the story of our special neighborhoods and varied housing options.

## Relocation guide

The Orlando business and civic community is committed to immersing Amazonians in their new home. As you explore the opportunity of being located in Orlando we have an Orlando Economic Partnership Board of Directors that represents a plethora of companies and industries who are invested in welcoming you. We'll roll out the orange carpet and ensure Amazonians have everything from residential relocation support to partner and spouse career assistance. And of course, you'll need everything from theme park tickets to theatre tickets to help you feel at home.



KEN POTROCK  
Chairman,  
Orlando Economic Partnership  
and Disney Executive

"Orlando excels at planning and we are planning quite the welcome party for Amazon. We want to immerse Amazonians in our community and our culture by giving you the tools you need to get started, help you succeed and encourage your company and people to excel. This is truly a city built on collaboration, inclusiveness and above all vision."



KUNAL PATEL  
Cofounder/Chief Technology Officer  
brandVR and Director of Innovation,  
FattMerchant

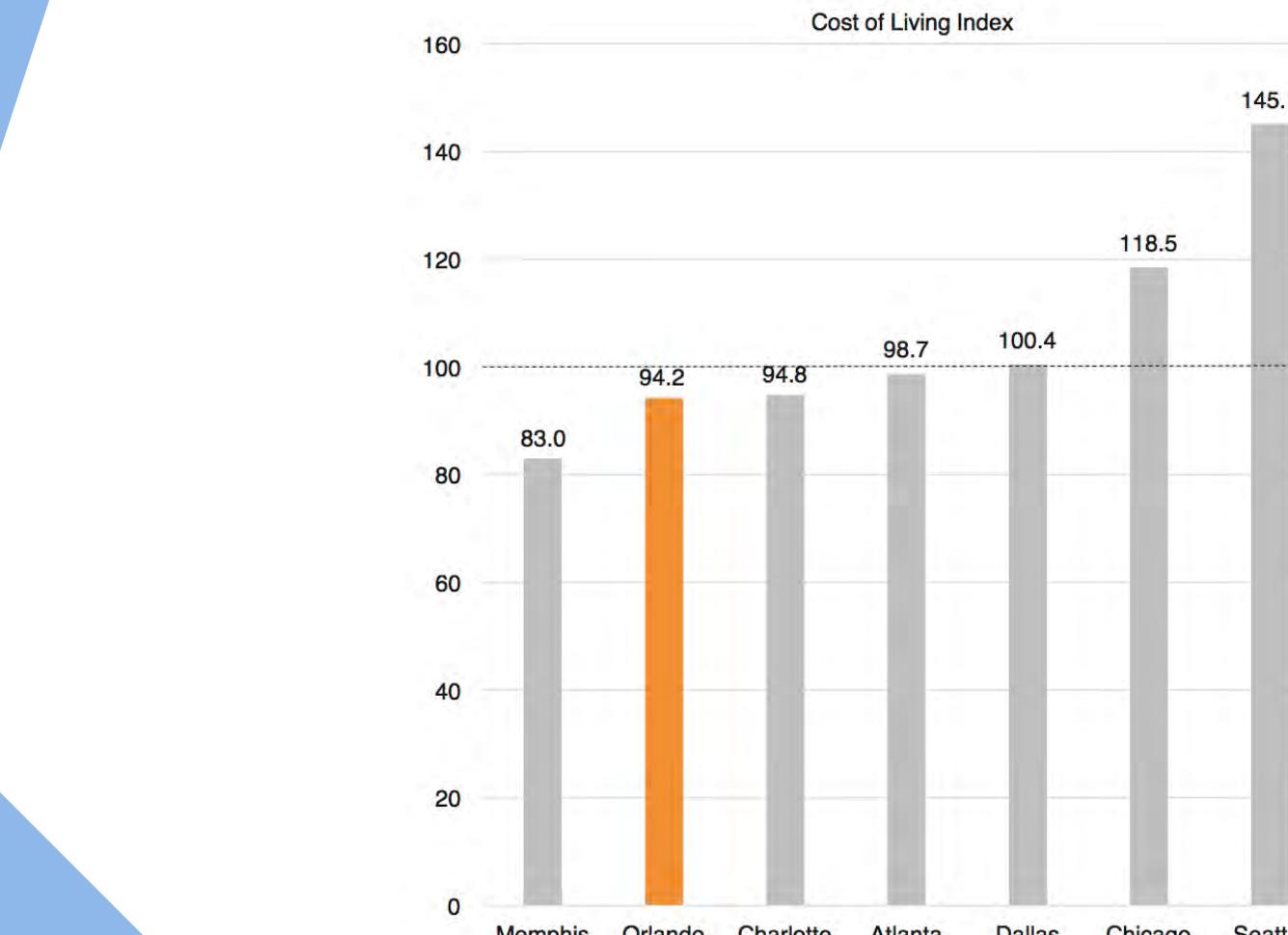
"You can be a part of the career that you want to be a part of, you can raise a family, you can afford to live not just get by. You can actually thrive and I think that's the really nice thing about Orlando. You can make it big but you can also make a family and a living. A lot of the resources that exist in Orlando come from not just physical places but actual people. I think people and community is one of the biggest assets that Orlando has."

## Cost of living

Everything from groceries to utilities is more affordable in Orlando when compared to other cities. With a cost of living index at 94.2, the Orlando region scores well below the overall national average and also scores well in the areas of healthcare, transportation, housing and utilities.

Median Sales Price of Existing Single-Family Home	
	2017 Q2 (\$ THOUSANDS)
METRO	171.5
Memphis	204.9
Atlanta	234.3
Charlotte	245.0
Orlando	255.2
Dallas	255.6
U.S.	264.3
Chicago	475.4
Seattle	

Source: National Association of Realtors



Source: Council for Community and Economic Research, 2016 annual average  
Numbers less than 100 are below national average

## Diverse Neighborhoods

### 1: Delaney Park

The best way to describe this downtown neighborhood is to say it is like *Leave it to Beaver* but with front porch happy hours. Stunning historic homes of all shapes, styles and sizes are woven together by brick paved streets and winding sidewalks that connect residents to the neighborhood park that hosts Fall and Spring little leagues and multiple lakes reflecting the downtown skyline. Two longstanding A-rated schools, Blankner (K-8) and Boone High School, contribute to the allure and fuel its coveted real estate value.

### 2: Lake Eola

The fusion of urban life and simplicity can be found within a myriad of apartments and condominiums wrapping Lake Eola, the crown jewel of Downtown Orlando. Lake Eola is downtown's central park and center stage to festivals and the country's 5th ranked Farmer's Market (American Farmland Trust). A veritable buffet of street level restaurants, bars, shops, and a grocery store collide with the free LYMMO line that circulates throughout downtown to deliver a true-car free existence.

### 3: Audubon Park Garden District

Inside this award-winning shopping and dining ecodistrict, towering oak tree-lined streets are framed by mid-century modern homes. Walk over to the East End Market for a cup of Lineage Coffee, a fresh baked cookie from Gideon's, and black truffle goat cheese for later from La Femme Du Fromage. Grab a brew or two from one of the top ranked beer gardens in the world: Redlight Redlight. One-of-a-kind neighborhood events like The Retro Modern Home Tour, Zombietoberfest, and Sip and Strolls are just more icing on the local Blue Bird Bake Shop (cup)cake.

### 4: Laureate Park

From brightly colored bungalows to multi-story estates, Lake Nona's Laureate Park features the region's fastest internet connections (10G), a lifestyle led by wellbeing and smart homes that set the bar for energy savings. Farmers markets, yoga, live music, community gardens, dog parks, fitness center, resort-style aquatic center, schools, JUICE bike share and neighborhood restaurants and markets are all within walking distance.

### 5: Celebration

Celebration has successfully combined education, health, community, technology and architecture into a community with a strong sense of self. World-renowned architects designed Celebration to be a new and exciting place to live, work and play.

### 6: Windermere

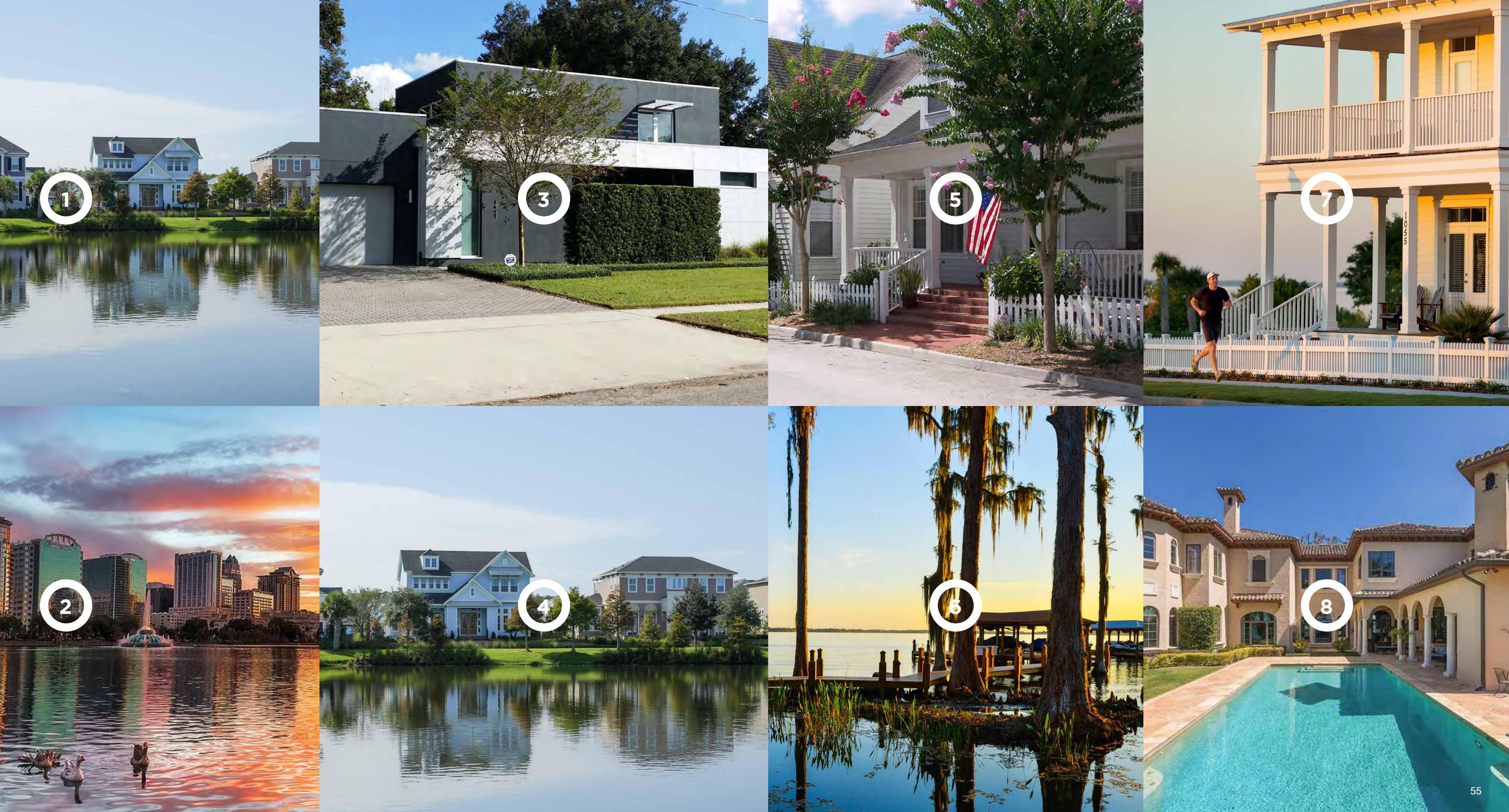
Home to professional athletes and celebrities, Windermere is surrounded by lakes where residents can enjoy boating, fishing and swimming with an architectural mixture from small homes to estate homes. A short drive delivers you to what locals refer to as "Restaurant Row" – a stretch of Sandlake Road that features a buffet of restaurants as luxurious as many of the homes that surround it.

### 7: Winter Garden

What would motivate downtown Millennials to drive 25 minutes to our more rural west? The quaint historic downtown, the West Orange Trail and Plant Street Market for starters. This sleepy little town has overnight become a haven for outdoor enthusiasts biking or jogging the 21-mile trail that runs through the charming town center and continues alongside Plant Street Market which features a brewery, food hall and local artisanal goods.

### 8: Winter Park

Postcard moments abound in this posh area which boasts top-rated restaurants, swanky stores, art museums and Rollins College. A central park anchors one of the top sidewalk art festivals in the country, outdoor concerts, the Winter Park SunRail station and ice skating in the winter. (Yes, we said ice skating and you'll have to come here to see it for yourself!) Gated lakeside estates, golf course homes, condos, apartments and townhomes all enjoy access to sought-after public schools and some of the region's highest real estate values.





## The best healthcare in your backyard

Orlando offers extensive healthcare options with globally recognized programs in cardiology, cancer, women's medicine, neurology, diabetes, orthopedics and rehabilitation. Florida Hospital and Orlando Health, both headquartered less than two miles from downtown Orlando, are two of the nation's largest healthcare systems.

### Florida Hospital

*U.S. News & World Report* recognized Florida Hospital as one of "America's Best Hospitals" for the past several years. The hospital offers health services for the whole family including nationally and internationally recognized programs.

### Health Village

Florida Hospital's Health Village is located just north of downtown Orlando. This 172-acre mixed-use transit oriented development includes housing and rail access for employees, a life sciences research center, a hospital cluster and a hub of growing companies.

### Orlando Health

Orlando Health is a community-based and supported organization of facilities comprising of the Orlando Regional Medical Center, UF Health Cancer Center at Orlando Health, Winnie Palmer Hospital for Women and Babies, Arnold Palmer Hospital for Children, Dr. P. Phillips Hospital, South Seminole Hospital, Health Central Hospital and South Lake Hospital. Orlando Health has a Level III Neonatal Intensive Care Unit and a Level I Trauma Center. Additionally, Orlando Health established the Heart Center at the Arnold Palmer Hospital for Children.

### Osceola Regional Medical Center

Located in the heart of Kissimmee, Osceola Regional Medical Center blends comprehensive state-of-the-art medical technology with comfort and convenience for patients with services offered in robotic surgery, behavioral care, neonatal intensive care, trauma, pediatric and emergency services, to name a few.

### State-of-the-art developments

Lake Nona in Orlando, originally known as *Medical City*, is a 17-square-mile master-designed community committed to healthy living and human performance. It's home to some of the nation's leading hospitals, universities, research institutions, and health and life sciences companies including the GuideWell Innovation Center, Nemours Children's Hospital, Sanford Burnham Medical Discovery Institute, UCF's College of Medicine, UF Research and Academic Center and the Orlando VA Medical Center.

## Sunny with a 100% Chance of Fun

No snow days. Year-round outdoor sports and recreation. Hundreds of parks. Hundreds of miles of trails. Freshwater springs. Beaches to the east and west. What will future Amazonians do when they're not busy fueling one of the most progressive companies in the world?

### Arts

Ranked by Movoto Real Estate Blog as the second most creative city in America, Orlando's innovation through our theme parks has spilled over to the surrounding community, making this a haven for artists and performers. The entertainment options are endless – including the state-of-the-art Dr. Phillips Center for the Performing Arts, Annie Russell Theatre, Wayne Densch Performing Arts Center, Orlando Ballet, Orlando Philharmonic Orchestra, Bach Festival Society, Florida Film Festival, Zora Neale Hurston Festival, and Orlando Fringe Festival. The Orlando Museum of Art, Cornell Fine Arts Museum, Broadway Across America: Orlando, Orlando's Shakespeare Theater, Orlando Repertory Theatre, the Mad Cow Theatre, the Osceola Center for the Arts, the historic Garden Theatre and Morse Museum are among the multitude of artistic outlets in Orlando for you to appreciate and enjoy.

### Shopping

Orlando's retail offerings are vast enough to fill 676 FIFA football fields and include two of the top 10 highest sales-generating shopping locations in the U.S. – the Mall at Millenia and the Orlando Premium Outlets. The region's top tourist attractions – Disney Springs and Universal CityWalk – also offer exciting and fantastical retail experiences designed to satisfy local and international shoppers alike.

For a shopping spree of another breed, novel retail districts with one-of-a-kind retailers can be found throughout the region. Explore the bounty of local retailers promising unique finds and Instagram-worthy atmospheres.

### Sports

State-of-the-art facilities in Downtown Orlando host year-round professional sports including the Orlando Magic (NBA), Orlando City Lions (MLS), Orlando Pride (NWSL), Orlando Solar Bears (ECHL), NCAA regular season football games and major televised bowl games.

With our deep tech roots, eGaming is scoring big and igniting the Orlando Magic's participation in the NBA 2K Esports League.

The United States Tennis Association and a new 23-acre Orlando City Soccer Club training facility are located in Lake Nona.

Osceola County's professional Rodeo Cowboys Association (PRCA) Rodeo, Ram National Circuit Finals Rodeo, Silver Spurs Rodeo, and bass fishing competitions complete our regional sports roster.

The ESPN Wide World of Sports Complex hosts MLB spring training and was the first U.S. location to host the International Invictus Games.

Open space, fresh air, and sunshine create fertile grounds for youth sports. The Amateur Athletic Union (AAU) serves 700,000+ amateur athletes and 150,000+ volunteers from its Orlando headquarters.

### Parks and Rec

The region has over 200+ parks as well as hiking, trails, recreational centers and more lakes than you could ever enjoy.

### Community Readiness

Sometimes the flip side of our typically sunny climate brings tropical storms. When Hurricane Irma approached Florida, Orlandoans prepared and stood ready to help the state. The region's inland location, approximately 45 miles from Florida's Atlantic coast and 85 miles from the Gulf of Mexico, insulates our area from the brunt of tropical systems, storm surge and dramatically mitigates the risk associated with a direct hit from a hurricane.

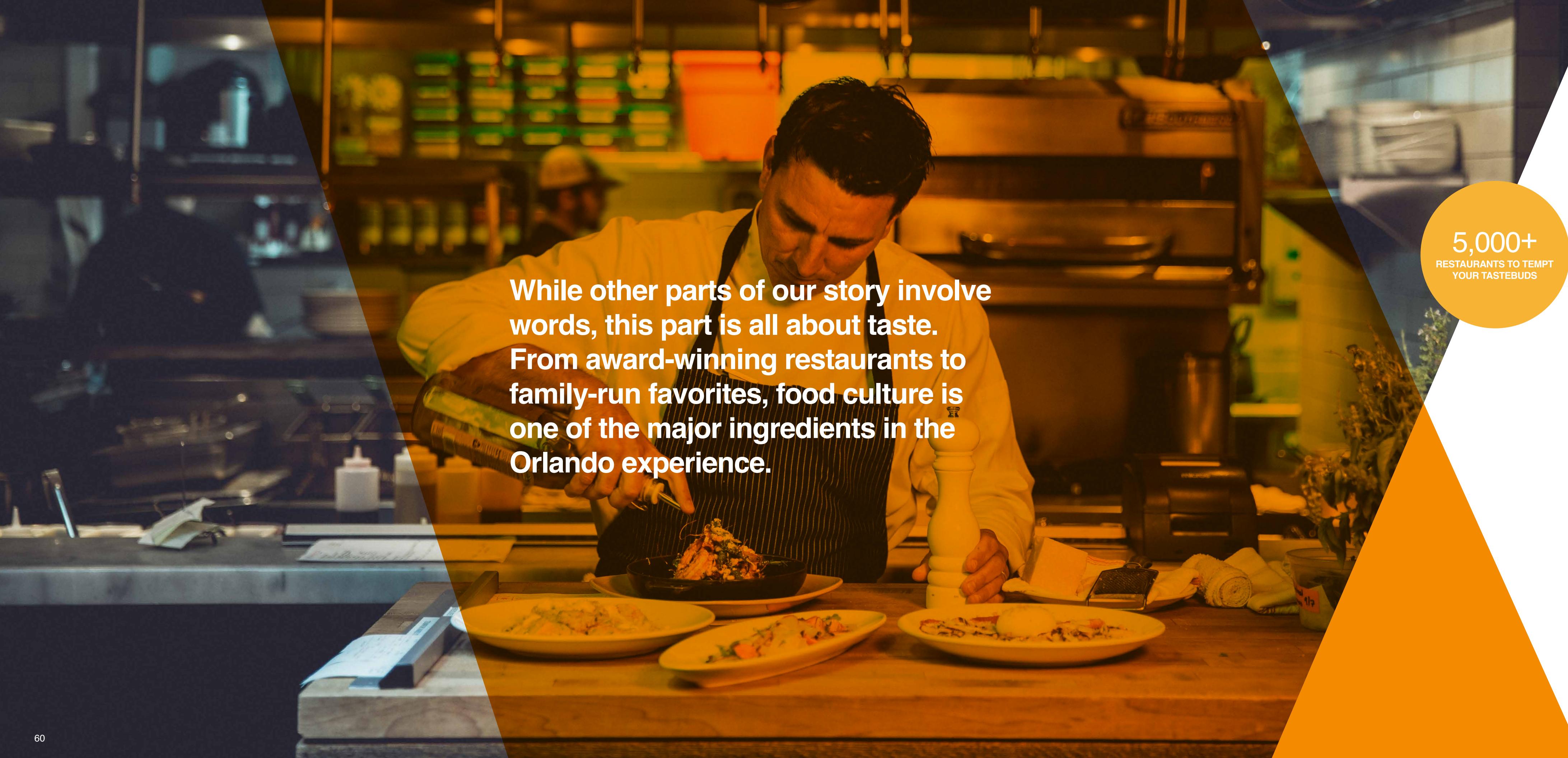
Many companies have chosen Orlando as their business location in Florida because the region is typically less affected than communities on either coast. Prior to 2004, it had been 40 years since Orlando had experienced a hurricane. In that year and again in 2017, the downtown core never lost power. Following Irma, most area businesses, including the theme parks, were back in action within 48 hours of the storm's passage.

Well prepared and coordinated, the region's disaster readiness is among the best in the country with trained emergency responders who practice their techniques daily as they protect the more than 186,000+ tourists who visit the region every day.

### Safety and Security

The Orange County Sheriff's Office and all other local entities are committed to the continued safety and security of our citizens. According to FBI Uniform Crime Report (UCR) figures, in 2016 the estimated number of violent crime offenses for the United States increased 4.1 percent from the 2015 estimate. The Orange County Sheriff's Office saw a 3.6 percent decrease during the same period of time.





**While other parts of our story involve words, this part is all about taste. From award-winning restaurants to family-run favorites, food culture is one of the major ingredients in the Orlando experience.**

5,000+  
RESTAURANTS TO TEMPT  
YOUR TASTEBUDS

## Food Culture

Orlando is a melting pot of Hispanic, Latino, Asian, Caribbean and Southern roots. Once again, our gracious year-round weather rewards us with an incredible assortment of farm fresh produce and our waterways supply us with freshly caught seafood daily. Inspired by our roots and nature's bounty, a new wave of independent restaurants is springing up around the region—from food trucks to haute cuisine—and instead of talking about it, you've got to take a bite.

While Universal and Disney deserve credit for long-ago elevating Orlando's dining with Victoria & Albert's at Disney's Grand Floridian Resort & Spa and Emeril's Orlando at Universal Orlando Resort, the wave of celebrity chefs keeps building. The new Disney Springs is now home to restaurants under the watchful eye of four James Beard Foundation-nominated chefs.

Now a whole new generation of culinary stars lights up the Orlando skyline, with restaurants opening almost every week. The "local" vibe made headlines when James Beard-nominated Chefs James and Julie Petrakis opened The Ravenous Pig in Winter Park, then expanded with Cask & Larder and adjacent Swine & Sons, all focused on local and sustainable sourcing.

Head to Orlando's global kitchens. For Cuban, it's Black Bean Deli in a former Phillips 66 gas station in the Mills 50 District. Pho-philes can also get their fix inside of Mills 50's Vietnamese neighborhood at Little Saigon or to Ming Bistro for dim sum. Fans of Puerto Rican motongo head to Kissimmee's Melao Bakery, and for ceviche, the Peruvian Ceviche House on Semoran Boulevard sits side-by-side with dozens of Latino restaurants. As we continue to see more culinary personalities enter the mix, Amazonians will reap the rewards.

# Cost of Doing Business

We've made the case that the Orlando region has the workforce and transportation infrastructure to meet your demand and that our community culture is ready to welcome Amazon with open arms but let's talk money...

Considering employee payroll, fringe and mandated benefits, real estate payments, property tax and overall operating costs, Orlando serves up savings like sunshine. Let's break it down.

## Employee Payroll

Orlando is able to sustain competitive wage rates without sacrificing quality. As you learned in the workforce chapter, Orlando's labor is less expensive than the national average 90 percent of the time. Compare this to other major metros where wage rates can be as high as 138 percent of the Orlando average. Paying a software engineer \$100,000 in Seattle is equivalent to paying that same engineer \$72,464 in Orlando, annual savings of \$27,536 per person. This equates to saving \$121 million in payroll annually on software development engineers by the end of phase three.

## Fringe and Mandated Benefits

Expect to save anywhere from five to 15 percent on costs associated with reemployment taxes by locating in Orlando instead of another major metro like Charlotte or Dallas. Florida's reemployment tax rate is set at a minimum of 0.1 percent and a maximum of 5.4 percent based on a salary up to \$7,000 per employee. This places Florida among the lowest in terms of the maximum rate. Additionally, Florida employers in the voluntary market pay on average \$1.66 for workers compensation per \$100 of payroll. This is the 19th lowest average workers comp rate in the country.

### Metro Area Operating Cost Comparison (Source: MetroComp 2016)

The following annual business operating cost comparison was prepared using information provided in the request for proposals. This comparison is calculated with limited inputs and is only intended to illustrate cost savings in comparison to other metros.

Metro Area	Employee Payroll	Fringe and Mandated Benefits	Utilities	Building/Lease Payments	Property Tax	Total Operating Cost	Local Index
Orlando	\$4,491,646,400	\$1,074,672,893	\$5,493,535	\$123,291,708	\$73,271,590	\$5,768,376,125	100.0%
Atlanta	\$4,717,612,600	\$1,127,374,394	\$6,011,251	\$124,876,233	\$85,991,198	\$6,061,865,676	105.1%
Charlotte	\$4,763,012,700	\$1,143,415,040	\$5,335,855	\$117,505,880	\$61,980,386	\$6,091,249,861	105.6%
Dallas	\$4,761,997,300	\$1,138,229,949	\$3,259,659	\$120,494,064	\$132,045,793	\$6,156,026,765	106.7%
Chicago	\$4,883,469,100	\$1,178,564,625	\$5,774,864	\$166,192,139	\$56,691,321	\$6,290,692,049	109.1%
Seattle	\$5,197,914,800	\$1,277,936,468	\$7,683,227	\$145,959,879	\$51,848,239	\$6,681,342,612	115.8%

## Utilities

Utilities in Orlando are five percent cheaper than Chicago, nine percent cheaper than Atlanta and 29 percent cheaper than Seattle, translating to savings of millions of dollars per year. In addition to our already competitive rates, Orlando has dedicated utility partners prepared to work aggressively with you to offset the costs, which you will find outlined per site. Not only are they committed to getting the best rates possible but also in the most sustainable and reliable ways.

## Construction Costs

According to the R.S. Means 2016 Construction Index, Orlando's cost of construction and labor is significantly cheaper than the national average, scoring 87.4. Your construction dollars go further in Orlando. \$5 billion of capital investment nationwide would buy you an additional \$630 million worth of labor and materials in Orlando and \$150 million less in Seattle.

AMAZON COULD SAVE  
**\$121 MILLION**  
IN PAYROLL ANNUALLY ON  
SOFTWARE DEVELOPMENT  
ENGINEERS

\$5 BILLION IN  
ORLANDO BUYS  
AMAZON AN EXTRA  
**\$630 MILLION**  
WORTH OF LABOR AND  
MATERIALS

## Taxes

Florida's tax burden is one of the nation's lowest. Estimated now at 9.31 percent of total state income, Florida's business climate ranks 4th best in the U.S.

### Corporate Income Tax

Florida's corporate tax structure consists of a 5.5 percent tax on corporate income apportioned to Florida, which ranks 16th lowest among states that tax corporate income. Taxpayers doing business in and outside the state apportion their adjusted federal income to Florida by a three-factor formula (25 percent to property, 25 percent to payroll and 50 percent to sales). Florida reserves a single factor option for investments over \$250,000,000 over a two-year period.

### Property Taxes

Each county and city with a proposed site has agreed to a 100% tax abatement or rebate for 10 years for each project phase. This abatement is for the county/city portion of the millage rate. The total millage rate is the sum of the rates of all applicable taxing units including counties, cities, schools and special districts. Florida has no state property tax. Taxes are levied on real and tangible personal property. All property is appraised at full market value and taxes are assessed by local assessors on 100 percent of appraised value. Total millage rates in the Orlando region range from 15.4670 to 26.7716 with an approximate percentage valuation of 1.7 percent.

### Sales Tax

Florida levies a six percent general use sale or use tax on consumers. Some counties within the region impose additional rates from 0.5 to 1.5 percent for a combined sales and use tax rate ranging from 6.5 to 7.5 percent and those will each be addressed per site. There are numerous sales and use tax exemptions including:

- Labor component of research and development expenditures
- Machinery and equipment used predominantly in research and development
- Commercial space activity — launch vehicles, payloads and fuel, machinery and equipment for production of items used exclusively at Spaceport Florida
- Production companies engaged in Florida in the production of motion pictures, made for television motion pictures, television series, commercial music videos or sound recordings
- Semiconductor, defense and space technology-based industry transactions involving manufacturing equipment
- Machinery and equipment used by a new or expanding Florida business to manufacture, produce or process tangible personal property for sale

### State Tax Comparisons

(Source: 2017 State Business Tax Climate Index, The Tax Foundation)

	Florida	Georgia	North Carolina	Texas	Illinois	Tennessee	Washington
Tax Foundation 2017 Rank	4	36	11	14	23	13	17
Corporate Income Tax	5.50%	6.00%	4.0%	-	7.80%	6.50%	-
Gross Receipts Tax	-	-	-	0.375%-0.75%	-	-	0.13%-3.3%
Property Tax as a Percentage of Personal Income	2.94%	2.69%	2.39%	3.56%	4.26%	2.13%	2.84%
Sales Tax	6.00%	4.00%	4.75%	6.25%	6.25%	7.00%	6.50%
Reemployment Tax Taxable Wage Base	0.10%-5.40% \$7,000	0.04%-8.10% \$22,300	0.45%-7.47% \$9,000	0.55%-7.75% \$12,960	0.01%-10.00% \$8,000	0.13%-5.72% \$44,000	-
Income Tax	None	1%-6%	5.75%	None	3.75% of federal adjusted gross income	6%	None

## Individual Income Tax

Florida is among six states in the country that collect no personal income taxes; a constitutional provision guarantees this.

## Total Operating Cost

When it comes to pro-business climate, one would be hard-pressed to identify a better example than Orlando. KPMG recently named Orlando the No. 2 most cost-competitive location in the U.S. (large cities) in its 2016 Competitive Alternatives study reviewing key cost components including taxes, labor, facilities, transportation and utilities. Here's why: Unique to Orlando is the role that tourism plays, generating millions of dollars in tourist development tax revenue. This money is reinvested in our local community and enhances our residents' lifestyles, community assets and recreational choices.

When you look at the overall balance of operating costs, Orlando is a smart option saving you money where it counts. From the tax savings to the nationally competitive construction costs, the Orlando region is committed to working with you to make sure Amazon has all the advantages for success.

## No. 2

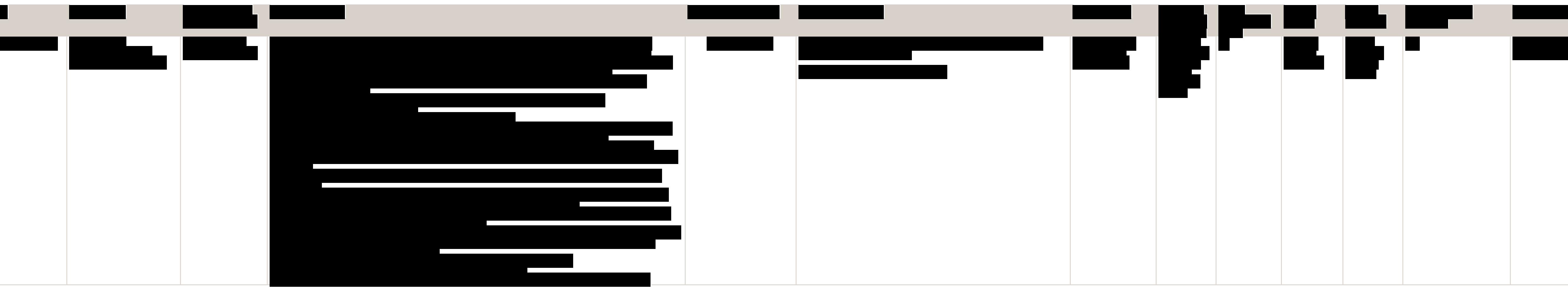
MOST COMPETITIVE  
LOCATION IN  
THE U.S.  
(KPMG)

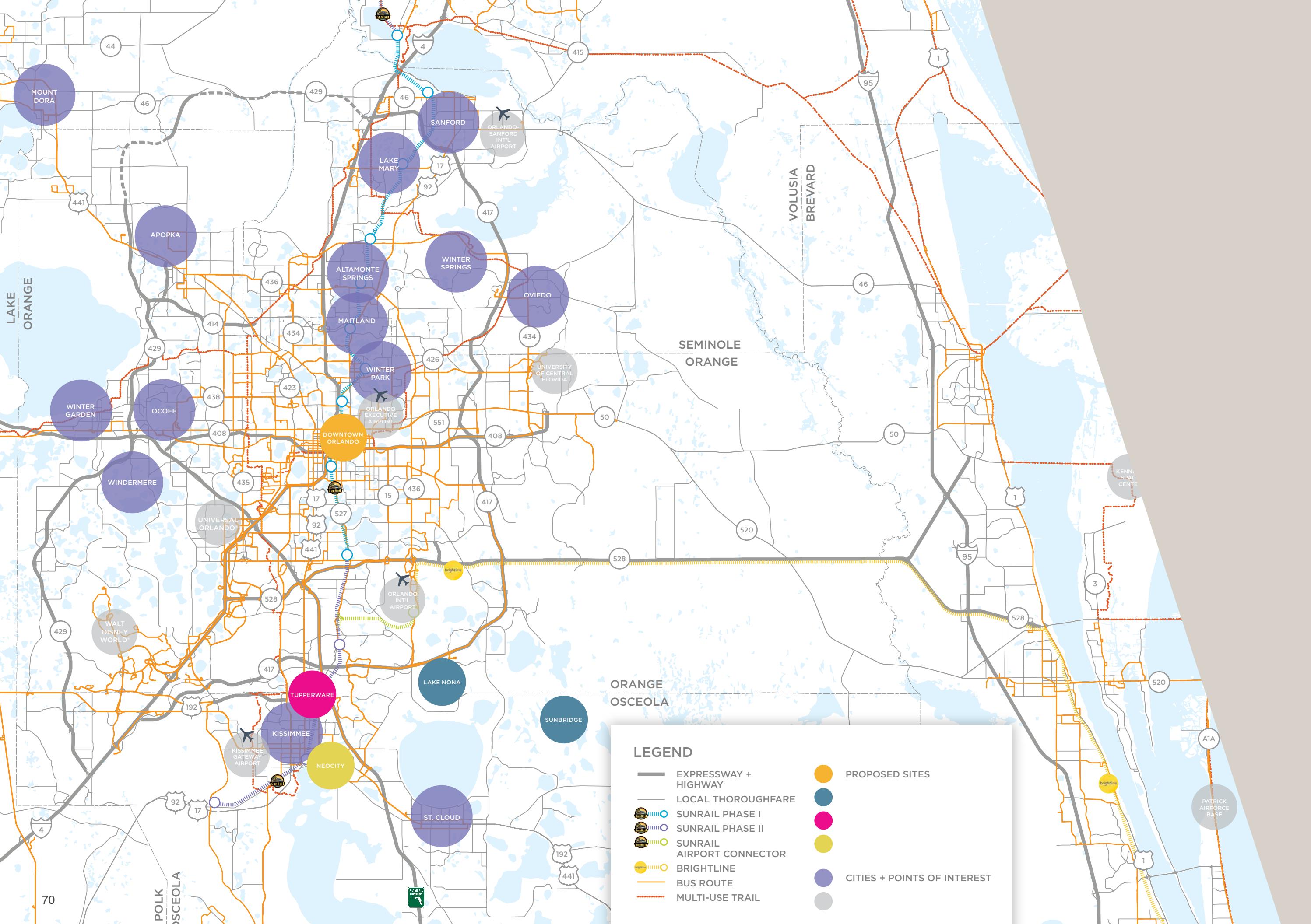
EACH COUNTY AND  
CITY WITH A PROPOSED SITE  
HAS AGREED TO A  
**100% TAX  
ABATEMENT**  
OR REBATE FOR 10 YEARS FOR  
EACH PROJECT PHASE.

# Economics









# Choose Your Own Adventure

Amazon HQ2.0 will solve the world's most challenging technology demands when it selects a worthy lab, launchpad, classroom and muse. You and your fellow Amazonians are charged with finding a community that is bold, customer-centric and peculiar. A place with a complementary ethos, creative spirit, and an endless supply of the most precious natural resource of all: talented people.

In reviewing your requirements, we have identified 4 contrasting sites for HQ2.0 including creating your own city from the ground up, a Neo-urban growth area, the vibrant verve of our urban core, or configuring a multi-site campus that could span all three.

Downtown Orlando

NeoCity

Lake Nona +  
Sunbridge

Tupperware



