

Beyond THE BASELINE

ORLANDO PROSPERITY SCORECARD

2021

Measuring what matters.



ORLANDO
ECONOMIC
PARTNERSHIP

Beyond THE BASELINE

ORLANDO PROSPERITY SCORECARD

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Measuring what matters.

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We typically use scorecards in a game, a way to record the ebb and flow of a contest toward the goal of winning. More recently, states and regions have adopted similar visual approaches to illustrating trends in socio-economic performance. By introducing the updated Orlando Prosperity Scorecard, we present insights from data analysis as a guide for developing strategies to shape a better, more prosperous future.

Advancing Broad-based Prosperity™ is the Orlando Economic Partnership's goal. How do we pursue that? By aligning our community's resources to create strategies that allow us to better understand how prosperity is distributed in the Orlando region. We are candid and deliberate in measuring the factors that matter most to stakeholders committed to realizing equitable benefit across the entire community.

In this report, you'll find key takeaways and justification for the intense focus and collaboration necessary to realize our goal of broad-based prosperity, benefiting most recently from our partnership with the Brookings Institution. I would like to extend a special thank you to the Brookings Metropolitan Policy Program as well as the many Orlando leaders who provided the necessary feedback to make this updated Scorecard possible. Together, we continue the work in our community addressing challenges and capturing opportunities to build a brilliant region for all who call Orlando home."



**ORLANDO
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Tim Giuliani
President and CEO,
Orlando Economic Partnership

PREFACE

- **If business ownership rates in Orlando were equal, there would be an additional 7,700 Black-owned, 11,900 Hispanic-owned and 31,900 women-owned businesses in Orlando.**
- **Social capital improved in the Orlando region over the last five years. More than 98 percent of Orlando's neighborhoods are racially integrated, ranking the region fourth on a list of 13 metropolitan areas.**
- **Commuters relying on public transit to reach work only have access to 5,500 jobs in 30 minutes. This is one percent of the opportunities available to a resident with a car.**

These are the types of insights and goalposts that can be generated by the indicators included in the Prosperity Scorecard. If you would like to learn more about using the Prosperity Scorecard to drive corporate or philanthropic strategies by measuring what matters, please contact the Orlando Economic Partnership for more information.



Alan Berube
Senior Fellow and Deputy Director
Brookings Metropolitan Policy Program

“ More than 65 years have elapsed since management guru Peter Drucker introduced the idea of setting objectives and measuring performance to steer a business. That idea profoundly transformed not only corporate America, but also many other public and civic institutions that embraced a philosophy of results-oriented management. By the late 20th century, most U.S. regional organizations had developed a dashboard that tracked metrics of economic growth and “quality of life” such as population, jobs, house prices, safety, and school performance.

Over the past several years, however, many regions have reconsidered what constitutes economic success, and what role indicators should play in facilitating it. Before the COVID-19 pandemic, Orlando had ranked as one of the nation's fastest-growing metropolitan areas for multiple decades, but too few of its residents shared in the full benefits of that growth. As regions now begin to look toward economic recovery, Orlando's experience inspires our focus at Brookings Metro on helping more regions deliver inclusive economic growth that benefits all people and all places, what the Orlando Economic Partnership terms broad-based prosperity.

The Partnership's commitment to that vision made them a valuable participant in our Inclusive Economic Indicators Learning Lab. Throughout 2020, Brookings Metro worked with the Partnership, along with counterpart organizations in Indianapolis and Memphis, to refine the indicators associated with inclusive growth. The resulting set of metrics presented in this report, *Beyond the Baseline*, provide a powerful impetus for coordinated public, private, and civic actions to identify and conquer shared challenges.

We were proud to help facilitate this latest iteration of the Orlando Prosperity Scorecard and look forward to supporting the Partnership's critical work with regional stakeholders to measure what matters as the foundation for achieving broad-based prosperity.”

INTRODUCTION



Orlando Prosperity SCORECARD

2021

The Orlando Prosperity Scorecard is a mechanism to track economic performance and community development with the goal of achieving Broad-based Prosperity™. The metrics fall into the Broad-based Prosperity™ framework of opportunities, capabilities, and access. This 2021 report highlights updates made to the Prosperity Scorecard over the course of 2020 as part of the Brookings Institution's Inclusive Economic Indicators Lab.

KEY TAKEAWAYS:

- The Prosperity Scorecard shows that barriers to workforce participation have been decreasing over time. Orlando has an educated workforce with access to new opportunities being created by a digital economy.
- However, this growth is fragile and has not been enough to propel Orlando forward in rankings among peer metros¹. Prosperity is not distributed evenly in Orlando when we consider outcomes by race, ethnicity, and gender. The economic fallout of the COVID-19 pandemic further threatens future prosperity.

¹ See the Appendix for the list of peer metropolitan areas.

The Orlando region's vision for economic success is broad-based prosperity™. This means an economy that creates opportunities for all; where regional talent has the capabilities to take advantage of those opportunities, and barriers limiting access to participate in the economy are removed. However, across America, this is proving more difficult to achieve with each passing decade. At a regional level, we know that a child's life outcome is heavily dependent on the neighborhood where they grow up.

Prior to the COVID-19 pandemic, Orlando joined the nation in experiencing the longest period of economic expansion in history, with strong job gains and fast population growth. Yet the proportion of households in Central Florida living paycheck to paycheck increased to almost half. Growth driven by population and traditional measures of economic activity is not enough.

As we wait for comprehensive data that captures the economic and social consequences from COVID-19 to become available, the trends highlighted by the Scorecard serve as a baseline for economic recovery and offer a guide to rebuilding with a deeper understanding of the factors that advance a region where prosperity is truly broad-based. Early indicators show that the pandemic accelerated existing trends and disparities ranging from the growth of remote work opportunities to the toll the virus has taken on women and communities of color.

The Orlando Prosperity Scorecard captures a view of the Orlando region before the national economy was brought to a standstill. It serves as a baseline, highlighting the trends that were playing out in an economy that seemed strong by standard measures. It helps us better understand how prosperity has been distributed in Orlando and where barriers to economic mobility linger, even at a time when typical measures of growth suggest economic success.

We do not accept as our fate median wages that rank at the bottom of the nation's 50 largest metro areas. Economic success means increased pay and better life outcomes for residents in an economy that offers expanded options and resources for the working poor to move up the economic ladder. For prosperity to truly be broad-based, the region requires a reduction in, and eventual elimination of, differences in life outcomes corresponding to race and neighborhood.

The long-term economic fallout from the COVID-19 pandemic can be expected to make our goal of broad-based prosperity even more challenging. The Scorecard's key takeaways set a new standard for economic recovery, one where people and place are considered more holistically in regional approaches to growth.

FRAMEWORK



Three overarching lenses comprise the Orlando Economic Partnership's (the Partnership's) framework for broad-based prosperity as one that reconnects economic development with community development. Each lens focuses attention on the requisite features of an economy built for social mobility: Opportunities, Capabilities, and Access.

Opportunities represent the vibrancy of the economy leading to expanded options for Central Floridians to participate in the region's growth. Economic growth alone is not sufficient. Instead, growth and increasing regional opportunities should be diverse, provide sustaining incomes, and reverse the erosion of the middle class.

Capabilities reflect the ability and capacity of the region's talent supply to meet the demands of employers competing in a rapidly evolving economy. A healthy workforce equipped with in-demand skills creates a vibrant talent ecosystem.

An emphasis on **access** reveals the presence or absence of barriers hindering full participation in the economy. This includes material needs, such as food, broadband connectivity, affordable housing, and transportation. It also calls for addressing the systemic hurdles associated with racism and bias that hinder equity and inclusion.

The Orlando Prosperity Scorecard serves as a tool quantifying this framework, capturing the Orlando Metropolitan Area's pursuit of broad-based prosperity. Each of the three broad-based prosperity lenses are measured for their overall progress (referred to as prosperity indicators) but also the gaps that exist between people, giving a fuller picture of how broad-based prosperity is distributed in the Orlando region. Revealing gaps between demographic groups proves particularly instructive in identifying neighborhoods where decades of private actions and public policy created patterns of disinvestment leading to concentrated poverty. See page seven on place-based action for further discussion of how neighborhood data compliments the Scorecard.



DEFINING THE INDICATORS

Refer to the legend at the top of the following page as a guide for interpreting the Scorecard. For people indicators, gaps or disparities are included based on race, ethnicity, and (where available) gender.

RACE

Differences between non-Hispanic white residents and Black residents.

ETHNICITY

Differences between non-Hispanic white residents and Hispanic or Latino residents.

GENDER

Differences between men and women.

Orlando Prosperity SCORECARD

2021

INDICATOR KEY

Green Value | Rank in Top Half of Peer Metros*
Red Value | Rank in Bottom Half of Peer Metros
Gray Value | Ranking Not Available
 ▲ | Improved
 ▼ | Worsened

*See the Appendix for the list of peer metros

Households Above ALICE Threshold **53.2%**
 ALICE Households **34.6%**
 Households Below Poverty **12.2%**

A.L.I.C.E. 2010-18
 Asset Limited, Income Constrained, Employed (ALICE)

**All indicators represent the Orlando MSA except where otherwise noted

OPPORTUNITIES

ECONOMIC DIVERSIFICATION

Industry Diversity Index **58.1%** 2019

JOBS

Middle Wage Jobs **667,750** 2014-19 ▲

INCOME

Median Wage **\$34,320** 2014-19 ▲

INNOVATION & ENTREP.

Jobs at Stage Two Companies **32.6%** 2014-19 ▼

PEOPLE

Occupation Diversity Index **6.3%** 2019

	RACE	ETHNICITY	GENDER
Employment Rate Gap	-2.6pp 2014-19 ▼	-3.6pp 2014-19 ▼	9.1pp 2014-19 ▼

	RACE	ETHNICITY	GENDER
Median Income Gap (\$000s)	\$22.7 2014-19 ▼	\$20.6 2014-19 ▼	\$12.3 2014-19 ▼

	RACE	ETHNICITY	GENDER
Business Ownership Disparity	77.5% 2012-17 ▲	57.8% 2012-17 ▼	60.4% 2012-17 ▼

CAPABILITIES

SOCIAL CAPITAL

Disconnected Youth **7.1%** 2013-18 ▲

INDIVIDUAL HEALTH

	PHYSICAL	MENTAL
Adults in Poor Health**	13.9% 2014-17 ▼	14.0% 2014-17 ▼

K-12 EDUCATION

3rd Grade Reading Proficiency **56.5%** School Year 2015-19 ▲

CONTINUED EDUCATION

Educational Attainment (AA+) **43.7%** 2014-19 ▲

PEOPLE

Population Living in Racially Integrated Neighborhoods **98.1%** 2013-18 ▲

	RACE	ETHNICITY	GENDER
Years of Potential Life Lost Gap** (Per 100K Residents)	-1,098 2014-19 ▼	2,047 2014-19 ▲	3,568 2014-19 ▼

	RACE	ETHNICITY	GENDER
3rd Grade Reading Proficiency Gap	36.0pp 2015-19 ▼	25.8pp 2015-19 ▼	—

	RACE	ETHNICITY	GENDER
Educational Attainment Gap	15.9pp 2014-19 ▼	14.4pp 2014-19 ▼	-3.6pp 2014-2019 ▼

ACCESS

TRANSPORTATION

Jobs in 30-min. transit Commute **5,500** 2015-19 ▲

HOUSING

Severely Cost Burdened Renter Households **27.7%** 2013-18 ▲

FOOD

Food Insecurity Rate **12.0%** 2018

DIGITAL

% Households with Internet **89.9%** 2015-19 ▲

CHILD CARE

Kindergarten Readiness **56.0%** 2017-19

PEOPLE

	RACE	ETHNICITY	GENDER
Commute Ratio	9.9% 2000-17 ▼	6.4% 2000-17 ▼	—

	RACE	ETHNICITY	GENDER
Severely Cost Burdened Households Gap	-6.8pp 2018	-11.3pp 2018	—

	RACE	ETHNICITY	GENDER
Neighborhood Food Insecurity Gap	10.4pp 2018	2.4pp 2018	—

	RACE	ETHNICITY	GENDER
Internet Access Gap	5.1pp 2015-2019 ▲	5.0pp 2015-2019 ▲	—

	RACE	ETHNICITY	GENDER
Children Under 5 Living in Poverty Gap	-19.6pp 2014-2019 ▲	-15.2pp 2014-2019 ▲	—

NEIGHBORHOOD OPPORTUNITY INDEX

Place-Based Action

While organizing data and making it accessible adds value by increasing awareness of socio-economic trends, it is the explicit intention of the Partnership to leverage the corresponding insights for action. A distinguishing trait of the Orlando Prosperity Scorecard links data and analysis to neighborhoods so that the private, public and independent stakeholders in our region can move from awareness of challenges to the work of prioritizing solutions to address poverty—the antithesis of broad-based prosperity.

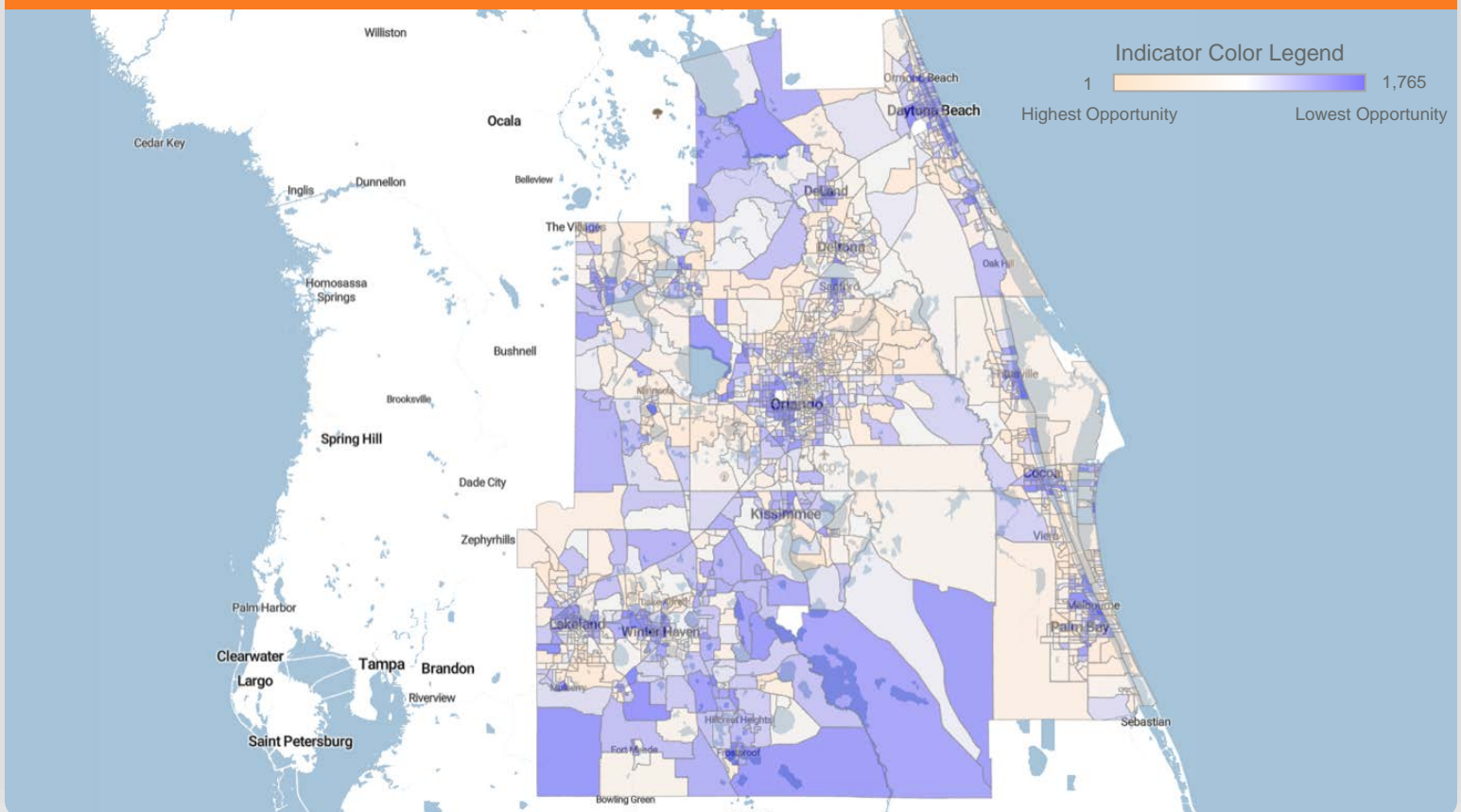
The Scorecard extends data collection and visualization to neighborhoods, wherever available data allows, as the ultimate level of analysis. Much has been learned about the power created by such a focus. Intergenerational poverty is intrinsically linked to place.

The research literature is validated in the real world by the practical success of Lift Orlando. This purpose-built community approach to neighborhood revitalization demonstrates the reality that where someone grows up has a profound and lasting impact on their future.

Scholars have been pointing to the connection between poor socio-economic outcomes and place for more than 30 years.

Research has mapped the constellation of poor outcomes — such as life expectancy and mental health — to place. It is not enough to collect data to simply underscore what we already know: living in poverty is a problem. Rather, the path to broad-based prosperity requires recognizing that living in impoverished places is the bigger problem.

The Neighborhood Opportunity Index (NOI), created by the Polis Institute, complements the Orlando Prosperity Scorecard’s region-wide information by providing searchable access to social and economic data for 1,765 neighborhoods across the four counties of the Orlando Metro (Lake, Orange, Osceola and Seminole County) and counties that contribute to the regional labor force (Brevard, Polk and Volusia County). The NOI reveals which neighborhoods require targeted investment to help advance the mission of broad-based prosperity. View the NOI by visiting Orlandoprospertyscorecard.org.





- **Middle-wage jobs and incomes were growing in Orlando prior to the COVID-19 pandemic. However, this growth was not enough to propel Orlando forward among peer metros or create a wider range of job types available to residents.**
- **Disparities in business ownership and a decline in stage two businesses mirror national trends and underscore the emphasis on strengthening Orlando’s innovation ecosystem.**

Prior to the COVID-19 pandemic, the Orlando economy was experiencing strong job growth and the number of middle-wage jobs (important for providing pathways to prosperity) were growing. The density of industry clusters in Orlando was more diverse than one might expect, with an industry presence that is 58 percent as diverse as an average U.S. metro.

However, this growth did not propel Orlando forward among peer metros in terms of median income or job diversity. In contrast to industries, Orlando residents do not have nearly the access to a diversity of job types compared to the average U.S. metro. This ranks Orlando 12 out of 13 peer metros, higher than Las Vegas and below Tampa. Our deeper understanding of occupational characteristics, specifically the Partnership’s work in the skills-based analysis, bodes well for expanding the variety of employment options to Orlando residents.

The Scorecard also highlights the benefit of continuously strengthening Orlando’s innovation ecosystem. Current national and local trends show a decline in the presence of stage-two companies (companies with 10-99 employees). While large companies tend to shed jobs during recessions, stage-two companies (also known as small-medium enterprises) are the backbones of regional employment and job growth.

Entrepreneurs whose dreams scale from the initial startup phase into this category are responsible for more than one-third of all jobs in America. Less than 33 percent of jobs in Orlando are at stage-two companies, ranking Orlando 12 out of 13 peer metros for the share of jobs at potential high growth companies behind Tampa at 33 percent and ahead of Las Vegas at 28 percent.

TECH CONNECT

The Orlando Tech Connect Program aims to restore the density of stage-two companies by connecting scaling startups to businesses searching for new partners. To better connect scaling businesses with available customers and contract opportunities, the Orlando Tech Council, in alliance with the University of Central Florida, launched a new program designed to create a scalable process to match local company needs with local companies’ skill sets. The Orlando Tech Connect program connects buyers and suppliers and curates connections between companies that will ultimately lead to a more interactive and dynamic ecosystem.



“Orlando residents have access to six percent of the same diversity of job types available in the average U.S. metro.”



The Scorecard also tracks outcomes by race, ethnicity, and gender. The indicators show that, generally, Orlando residents experience smaller gaps in pay, employment, and business ownership than 12 other peer metros of similar size and growth rate. However, this does not mean that disparities are non-existent. While these gaps are smaller in Orlando than other parts of the country, they have been widening over the last five years, as shown by the designated people indicators in the Scorecard. The box below highlights how many Black, Hispanic, and women-owned businesses are missing from Orlando, assuming that all residents should own businesses at a rate equal to their presence in the population.



If ownership rates were equal, there would be additional businesses in the region.

How Orlando ranks against 13 peer metros for minority business ownership gaps (#1 being the best).

+7.7K
Black-owned

#2
Black business ownership gap

+11.9K
Hispanic-owned

#1
Hispanic business ownership gap

+31.9K
women-owned

#6
Women business ownership gap

YOUR ROLE IN BROAD-BASED PROSPERITY™

As we work to build-back an even stronger and more inclusive Orlando, consider supporting the work of, or connecting with, these Orlando organizations already supporting minority-owned businesses, growing Orlando's innovation ecosystem, connecting workers to upward mobility pathways and creating diverse job opportunities for Central Florida residents. ■



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ORLANDO
TECH COUNCIL



ORLANDO
REGIONAL
CHAMBER



BLACK
ORLANDO
TECH



African American
CHAMBER OF
COMMERCE
CENTRAL FLORIDA



HISPANIC
CHAMBER OF COMMERCE
METRO ORLANDO





- **Traditional measures of workforce capabilities, such as educational attainment, have been improving and Social Capital indicators show that 98 percent of Orlando's neighborhoods are racially integrated.**
- **Health and K-12 educational achievement indicators show that gaps are widening between different demographic groups, underscoring the return to be realized by enhancing the capabilities of regional talent.**



UpSkill Orlando

Made possible through the generous support of JP Morgan Chase & Co., UpSkill Orlando is a regional, skills-based talent strategy that aims to create upward mobility opportunities by bridging the gap between local employers and educators to create skills-based career pathways and develop rapid credentialing programs focused on in-demand skills. The program also champions the method of skills-based hiring, a practice that removes inflated credential requirements from job postings and focuses on the skills a potential candidate brings to the table.

Capability metrics capture the baseline of how prepared Orlando's workforce is to take advantage of new opportunities being created in the region, especially in the rapidly changing post-COVID job market. Overall, education levels rose as the percentage of the population age 25+ with an associate degree or higher increased over the last five years to 44 percent, putting the region roughly middle of the pack amongst peer metros (ranking sixth out of 13) for this very traditional measure of human capital.

Yet, legacy educational attainment measures do not capture the full picture of workforce advancement or health. Social capital, an exploratory set of indicators on the Scorecard, attempts to capture the strength and diversity of interpersonal relationships within the region that so often lead to job opportunities. One possible indicator of social capital, the number of disconnected youths in the region, has shown steady improvements over time. The percentage of disconnected youth, those age 16-19 who are not working or not in school, fell by roughly 0.9 percentage points since 2013 and by more than 1,000 children in absolute terms. Another measure hinting at improving social capital levels in the region is the percentage of the population living in racially integrated neighborhoods. Orlando ranks highly for this measure (fourth of 13), with 98 percent of residents living in census tracts where less than 90 percent of the population is made up of a single race or ethnic group.

As social capital and traditional educational attainment measures improve, health and K-12 achievement indicators make clear the importance of tracking trends. The mental and physical health of City of Orlando residents² worsened over time. Orlando ranked near the bottom of peer cities in these health indicators. While the health of Orlando's workforce has immediate implications for who can take advantage of growing opportunities today, the K-12 educational attainment levels signal the strength of the region's workforce well into the future. Rankings against peer metros outside Florida are not available for K-12 achievement indicators, but the data reveal that 57 percent of third graders in Orlando read at or above grade-level by state education standards. This points to the critical role of pre-K preparation, quality child care, and the effects of toxic stress associated with economic instability. Again, these measures serve as a baseline of where the region was trending pre-pandemic. The long-term health impacts of COVID-19 or educational impacts of more than a year of remote learning are not yet known.

² Data for this measure is only available at the City level, not the entire MSA level like other metrics in the Scorecard. See the appendix for more details.



Much like the Opportunities metrics, an examination of Capability indicators highlights the existing disparities between demographic groups in Orlando. Gaps in health, K-12 indicators and continuing education outcomes all widened over the last five years in Orlando. While on average, 57 percent of third graders in Orlando read at or on grade-level, this number jumps to 76 percent of white students and falls to 50 percent of Hispanic students and 40 percent of Black students. This trend of widening disparities continues when we examine health outcomes, measured by years of potential life lost between white and Black residents or men and women and when examining educational attainment measured by the percent of the population with an associate degree or higher.

Up until the third-grade, children learn to read. After the third-grade, children read to learn, making third grade reading scores highly insightful to future life outcomes and an individual's potential to take part in a dynamic economy.

If the gap in third grade reading scores were zero, and all children in the Orlando region read at equal levels, Orlando would have an additional:

+2.3K
Black
third graders
reading on
grade level

+3K
Hispanic
third graders
reading on
grade level



YOUR ROLE IN BROAD-BASED PROSPERITY™

As we work to build-back an even stronger and more inclusive Orlando, consider supporting the work of, or connecting with, these Orlando organizations already working to support more equitable outcomes by neighborhood, educational attainment, and future-minded workforce development in the Orlando region. ■





- **Traditional barriers to participate in the economy are falling, as more jobs are available within a 30-minute commute and the number of severely cost burdened households improves.**
- **However, ranked against peer metros, Orlando struggles in these areas. Widening disparities in average commute times highlight that Orlando’s explosive growth over the past 20 years has not yielded equitable gains.**

If Opportunity indicators measure a growing economy and Capability indicators measure a workforce’s ability to take part in that new economy, then the Access indicators are the bridge connecting these. A healthy and qualified resident unable to take advantage of a new opportunity because of internet, childcare, or commuting constraints further strains the talent supply gap that businesses experience.

The good news is that pre-COVID, access to opportunities had been increasing for the average Orlando resident. Almost 90 percent of Orlando households have a wired internet connection, and gaps in internet access for Black and Hispanic households have been shrinking. The pandemic threw into sharp focus the importance of internet access for remote work, mental health and personal connections during a time of social distancing.

Of course, not all job functions can transition to the digital realm. The number of jobs available in a 30-minute commute increased for the average Orlando resident in the last four years and the number of severely cost-burdened renter households (spending more than 50 percent of monthly income on rent) fell over a five-year period. However, the region’s struggles in these areas become clear upon comparison to peer metros. Roughly 5,500 jobs

“
Orlando ranks 12 out of 13 peer metros for the percentage of severely cost burdened renter households.”

are available within a 30-minute transit commute in Orlando. This is one percent of the jobs available to a resident with her/his own car and places Orlando 11 out of 13, ahead of only Nashville and Raleigh, N.C. in rankings. On the affordable housing front, Orlando ranks 12 out of 13 for the percentage of severely cost burdened renter households, ahead of Sacramento.

ALLIANCE FOR REGIONAL TRANSPORTATION

The Partnership’s Alliance for Regional Transportation (ART) develops and advocates for transportation priorities that will enhance the safety and security of our transportation system; improve access to jobs, schools, and health care for Central Floridians; and increase the competitiveness of our businesses—positioning Orlando for continued prosperity through 2030 and beyond. Through the seven regional priorities outlined in the Orlando Transportation 2030 report, ART is making strong efforts to increase mobility for workers in the Orlando region. ART is working to increase mobility options for the employees in the Central Florida area by advocating strongly for the seven regional priorities that include important action items like building out and speeding up regional transit systems, transforming all of I-4, and improving east-west connectivity.





Again, much like Opportunity and Capability, we find that disparities in Access create barriers to prosperity for some residents when compared to others. The average Black employee in Orlando has a commute that is 9.9 percent longer than the average white worker. Hispanic workers travel 6.4 percent longer to work than the average non-Hispanic worker. This is often due to multiple factors including relying on public transportation to reach work or needing to live farther away from job centers to find affordable housing. The gap translates into fewer hours per year spent at home with family or pursuing new opportunities.

If commute gaps in Orlando did not exist, the average Black worker would reclaim 23 hours in their year, extra time currently spent traveling to and from work. Hispanic workers would reclaim 15 hours per year. Since 2000, workers have seen the commute gap:



63%

For Black workers in Orlando



142%

For Hispanic workers in Orlando

Signaling the region's inequitable growth over the last 20 years.



YOUR ROLE IN BROAD-BASED PROSPERITY™

As we work to build-back an even stronger and more inclusive Orlando, consider supporting the work of, or connecting with, these Orlando organizations already working to increase transportation options, encouraging the development of more affordable housing, and growing access to reliable internet, childcare, and healthy food. ■



WHAT CAN YOU DO?

Overall, the Prosperity Scorecard shows promise as barriers to workforce participation prior to the pandemic continued to dissipate. Orlando's educated workforce must continue to access and drive new opportunities in the digital economy. Competitiveness with peer metros is intense.

In many ways, the challenges of a rapidly evolving economy are not specific to Orlando. Gaps in pay, internet access, educational attainment, etc. exist across the country when these outcomes are examined by race, ethnicity, and gender. Preliminary analysis, still too early to integrate into the Scorecard, suggest that the COVID-19 pandemic has exacerbated the rollercoaster qualities of Orlando's labor market, defined by fast-paced, explosive job growth in the years leading up to 2020.

“**This is an opportunity to build beyond the baseline set by the Orlando Prosperity Scorecard.**”

To create a more resilient economy, the Partnership will continue to convene stakeholders and evolve new strategies that leverage the anticipated return of regional growth. As more of the population becomes vaccinated against COVID-19, tourism will return, and pent-up leisure and hospitality demand will once again drive economic activity. We look to seize the opportunity to shift from legacy economic growth patterns and build beyond this baseline set by the Orlando Prosperity Scorecard.

The challenges identified by the Scorecard cannot be solved by one organization alone; nor can solutions be created in silos. We embrace the increasing expectations being placed on the private sector in the collaborative work with public and independent partners who have joined the Partnership to advance Broad-based Prosperity™ in the region. The priorities highlighted by the Scorecard, ranging from transportation to housing to educational attainment, are not exclusively challenges for government and non-profits (or giving community) to solve. They are shared challenges that impact the available talent, innovation ecosystem and the community's collective bottom-line. ■

We invite you to use the Orlando Prosperity Scorecard as a catalyst for aligning your personal and organizational strategies as critical components of the collective action necessary to achieve broad-based prosperity.

The following engagement tiers outline options for learning more about the Scorecard and using it to drive corporate or philanthropic strategies.

TIER III

- ☑ Start with a subscription to a quarterly “Prosperity Scorecard Update” e-mail with new data highlights, specific to the Scorecard or other relevant research.
- ☑ Annual Scorecard presentation to governance boards and management.

TIER II

- ☑ *The above benefits plus:*
- ☑ The Partnership will provide annual indicator slides for sharing with governance boards, including discussion questions to facilitate integration of the Scorecard.
- ☑ Two seats in a bi-annual (virtual) Scorecard orientation session as training for internal staff to understand and utilize the Scorecard's insights.

TIER I

- ☑ *The above benefits plus:*
- ☑ The opportunity to model the economic impact of your community or philanthropic spending, overlaid with the areas of need revealed by the Scorecard. The study's results and recommendations can be used to prioritize investments and goal setting.




To begin a conversation about using Scorecard visit
OrlandoProsperityScorecard.org

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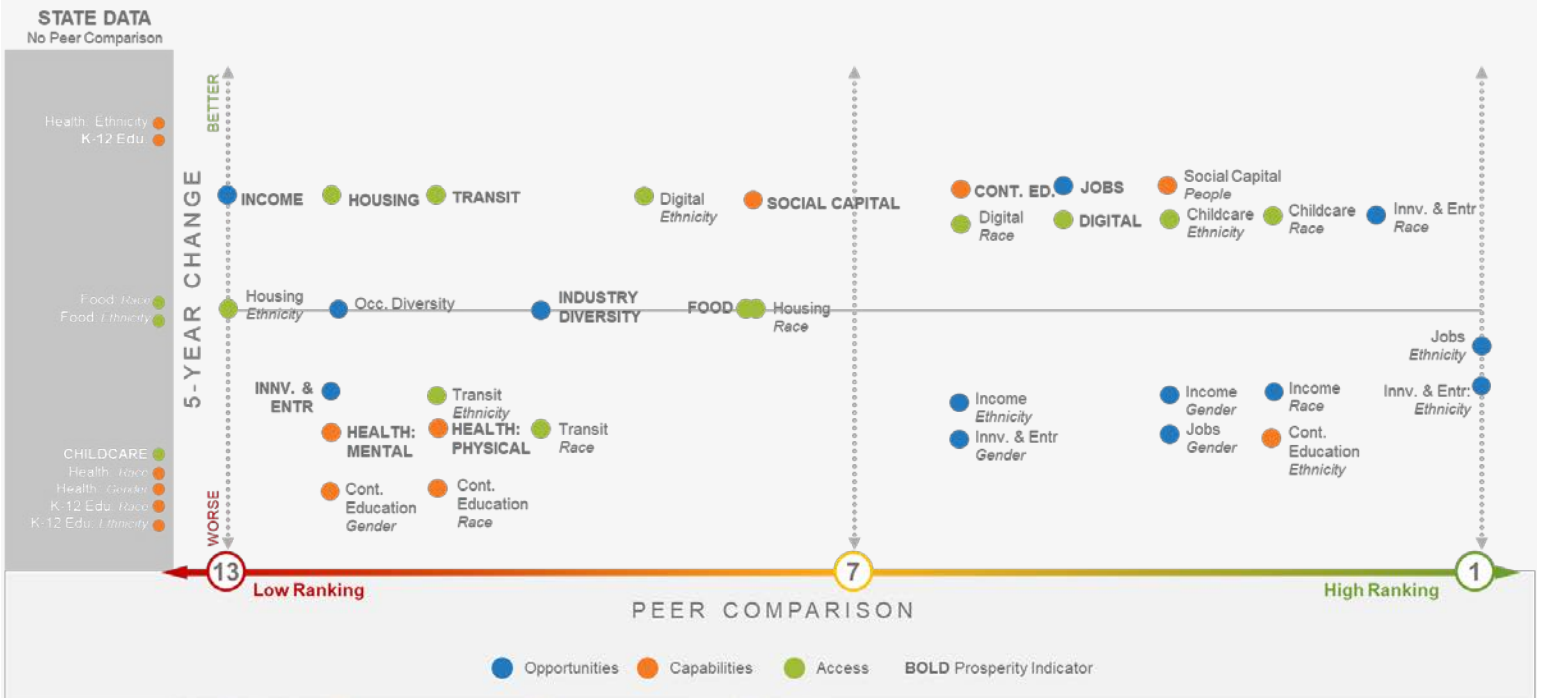
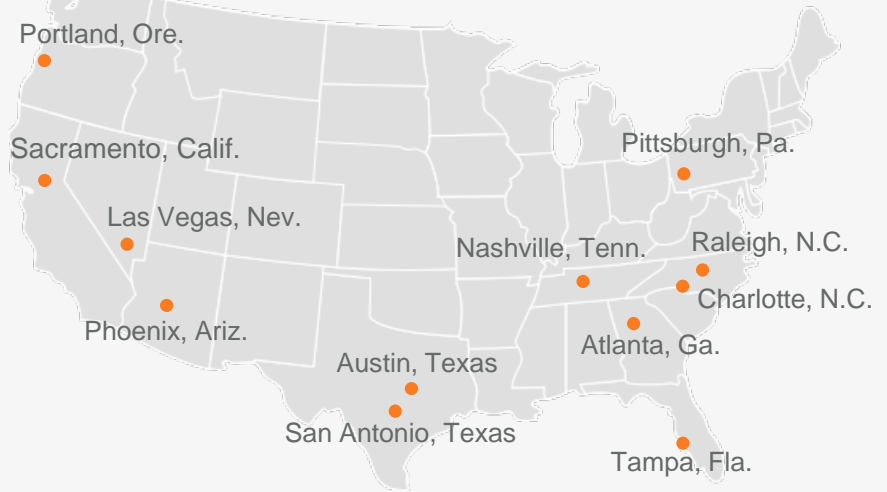
— 2021 —

Measuring what matters.

APPENDIX

PEER METROS

For each of the indicators, where data is available, the Orlando region is ranked against 12 comparison metropolitan areas (metros) across the country. This provides context and greater understanding for how Orlando is performing against peers. This group of peer metros was selected based on similarities in population size, economic size (Gross Domestic Product), and both population and economic growth rate over the past five years. The 12 comparison metros are listed by location on the map to the right. Atlanta is the only exception to the selection criteria and replaced Jacksonville, Fla. on the list of comparison metros.



See how Orlando ranks for each measure at OrlandoProsperityScorecard.org

Middle Wage Jobs

The number of jobs in Orlando with a median wage between the national 25th and 75th wage percentile (\$27,080 – \$64,240). Peer rankings based on the growth rate of those jobs over time.

Source: [Bureau of Labor Statistics, Occupational Employment Statistics](#)

Employment Rate Gap

The percentage point gap between two populations' employment rates. Race and ethnicity are measured by the population age 16+. Gender is measured by the population 20-63 years old.

For example, a smaller percentage of the white population in Orlando is employed compared to the Black population in Orlando. Men are employed at a greater rate than women.

Source: *United States Census Bureau, American Community Survey 5 Year Estimates Subject Tables. Table S2301 - Employment Status*

Median Income

The median income of all jobs in Orlando. Changes over time are based on the real median wage adjusted to 2019 dollars using the Bureau of Labor Statistics inflation calculator.

Source: [Bureau of Labor Statistics, Occupational Employment Statistics](#)

Median Income Gap

The difference in median household incomes for white, Black, and Hispanic households. Median incomes for households by gender are based on family households headed by either a man or woman with no spouse present. Changes over time are based on the real median wage adjusted to 2019 dollars using the Bureau of Labor Statistics inflation calculator.

Source: *United States Census Bureau, American Community Survey 5 Year Estimates Subject Tables. Table S1903 – Median Income*

Jobs at Stage 2 Companies

The percent of Orlando jobs that are at companies with 10-99 employees.

Source: <https://youreconomy.org/>

Business Ownership Disparity

The percentage of new Black, Hispanic, or women-owned companies that would exist if minority business ownership matched each groups' percentage of the Orlando population.

For example, Black-owned businesses make up 3.7 percent of all businesses but Black residents make up 16.4 percent of the population, revealing a business ownership rate of 22.5 percent and a disparity of 77.4 percent.

Source: *United States Census Bureau, 2017 Annual Business Survey & 2012 Survey of Business Owners*

Industry Diversity Index

Orlando's industry employment distribution compared to the average metro in the US. Reads as, industry employment in Orlando is 58 percent as diverse as the typical metro in the US.

Source: *Economic Modeling Specialists International (Emsi) & Council for Community and Economic Research*

Occupation Diversity Index

Orlando's occupation employment distribution compared to the average metro in the US. Reads as, jobs types available in Orlando are six percent as diverse as the typical metro in the US.

Source: *Economic Modeling Specialists International (Emsi) & Council for Community and Economic Research*

Adults in Poor Health

The percent of survey respondents who reported that their physical and/or mental health was not good for 14 or more days during the last 30 days. At time of publication, this data was only available at the city level. Peer rankings are for the principal city of each metropolitan area.

Source: [Center of Disease Control and Prevention, 500 Cities and PLACES project.](#)

Years of Potential Life Lost Gap

The difference between races and ethnicities in years of potential life lost (YPLL) due to premature death (death younger than 75). YPPL < 75 per 100,000 under 75. This data is only shown for Orange County, Florida. Other regional counties available upon request.

For example, white residents in Orange County gain an additional 1,098 years of potential life for every 100,000 people compared to the Black population. Men in Orange County lose 3,568 years of potential life for every 100,000 people compared to women.

Source: [Florida Department of Health, Leading Causes of Death Chart.](#)

Disconnected Youth

The percent of the population age 16-19 who are not enrolled in school and are either not employed or not in the labor force.

Source: *IPUMS, NHGIS*

Population Living in Racially Integrated Neighborhoods

The percent of the population living in racially integrated census tracts. A racially segregated census tract is defined as one where 90 percent or more of the population is either non-Hispanic white, non-Hispanic Black, or Hispanic.

Source: *United States Census Bureau, American Community Survey 5 Year Estimate Tables - DP05*

3rd Grade Reading Proficiency

The percent of third graders in Orlando reading at or above grade level.

Source: *Florida Department of Education*

3rd Grade Reading Proficiency Gap

The percentage point gap in third grade reading proficiency for children in different racial or ethnic groups.

For example, 76 percent of white students read at or above grade level while 40 percent of Black students are achieving the same goals, a gap of 36 percentage points.

Source: *Florida Department of Education*

Educational Attainment (AA+)

The percent of the population age 25+ with an associate's degree or higher.

Source: *United States Census Bureau, American Community Survey 5 Year Estimate Tables – S1501*

Educational Attainment Gap

The percentage point gap in educational attainment, as defined above, for different population groups. For example, 16 percent more of the non-Hispanic white population has an associate's degree compared to the Black population. Men are almost four percentage points less likely to have achieved this same level of education as women.

Source: *United States Census Bureau, American Community Survey 5 Year Estimate Tables – B15002, B15002B, B15002H, B15002I*

Jobs in a 30-minute Transit Commute

The number of jobs available to Orlando residents in a typical 30-minute commute. This includes last mile transportation and walking.

Source: [University of Minnesota Center for Transportation Studies](#)

Commute Ratio

The percent increase in commute time for Black or Latino workers compared to the average white worker in Orlando. For example, Black commuters travel 9.9 percent longer than white commuters.

Source: [National Equity Atlas](#)

Severely Cost Burdened Renter Households

The percentage of renter households in Orlando paying 50 percent or more of their monthly income to housing costs.

Source: [Harvard University Joint Center for Housing Studies](#)

Severely Cost Burdened Renter Households Gap

The percentage point difference between white and Black or white and Hispanic renter households who are severely cost burdened, as defined above. For example, 6.8 percent fewer white renter households are severely cost burdened compared to Black renter households.

Source: [Harvard University Joint Center for Housing Studies](#)

Food Insecurity Rate

The percent of the regional population experiencing food insecurity. Food insecurity, described by Feeding America, is a household's inability to provide enough food for every person to live an active, healthy life.

Source: Gundersen, C., A. Dewey, E. Engelhard, M. Strayer & L. Lapinski. *Map the Meal Gap 2020: A Report on County and Congressional District Food Insecurity and County Food Cost in the United States in 2018*. Feeding America, 2020.

Neighborhood Food Insecurity Gap

Calculated using food insecurity rates by census tract provided by Feeding America. The gap between the overall food insecurity rate and average food insecurity rate in census tracts where the population is more than or equal to 50 percent Black or 50 percent Hispanic. For example, 10 percent more of the population living in majority Black census tracts are food insecure compared to the regional average.

Source: Gundersen, C., A. Dewey, E. Engelhard, M. Strayer & L. Lapinski. *Map the Meal Gap 2020: A Report on County and Congressional District Food Insecurity and County Food Cost in the United States in 2018*. Feeding America, 2020.

Percent of Households with Internet

The percent of households with an internet subscription. This includes dial-up, broadband of any type, or satellite internet service.

Source: United States Census Bureau, *American Community Survey 1 Year Estimate Tables - S2801*

Internet Access Gap

The difference between the percent of the population with a computer and some form of broadband internet subscription by race and ethnicity. For example, five percent more of the white population with a computer has an internet subscription than the Black population.

Source: United States Census Bureau, *American Community Survey 1 Year Estimate Tables - S2802*

Kindergarten Readiness

The percent of kindergarteners who pass the Florida Kindergarten Readiness Screener test, administered within the first 30 days of the school year for all public- school kindergarten students.

Source: [Florida Department of Education](#)

Children (and younger) Living Below Poverty Gap

The difference between the percent of the population under age five living below the poverty line by race and ethnicity. For example, 11 percent of the white children under age five live in poverty while 31 percent of Black children under age five live in poverty, resulting in a gap of -20 percentage points.

Source: United States Census Bureau, *American Community Survey 5 Year Estimate Tables – Poverty Status in the Past 12 Months by Sex and Age Tables B17001 (H,B,I)*



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