
GROWTH MANAGEMENT PLAN INDICATORS

2017 ANNUAL REPORT

(January 1, 2017– December 31, 2017)

March 1, 2018



CITY PLANNING DIVISION
400 S. Orange Avenue
Orlando, FL 32801-4990

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EXHIBITS

Exhibit 1: Baseline Conditions and Annual Indicators

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CITY OF ORLANDO

GROWTH MANAGEMENT PLAN INDICATORS

2017 ANNUAL REPORT

The following report was prepared to summarize the City of Orlando's progress toward reaching the goals identified in the City's Growth Management Plan. Data from 2004 to 2013 was collected to comply with an agreement between the City and Florida's State planning agency. After the agreement expired in May 2014, the City adopted GMP Future Land Use Element Policy 1.5.1, which states:

The City shall monitor and implement its GMP, Land Development Code and other portions of the City Code in order to provide for a higher quality of life and development. The City shall monitor necessary community development and land use indicators and report results annually to the Municipal Planning Board.

This report fulfills this requirement.

A. GROWTH IN 2017

1. POPULATION

"The City of Orlando shall accommodate its projected resident population of 376,110 by the year 2045 in a manner which protects the established character of neighborhoods, preserves the existing pattern of the Traditional City and allows for the efficient, orderly and economic growth of newer urbanizing areas." - GMP Future Land Use Element Objective 1.1

In 2017, population is 281,053, and it grew by 5,715 since last year.

New development consists of:

- 533 single family units
- 1,694 multifamily units

2. EMPLOYMENT

"Throughout the planning period, and consistent with Smart Growth principles, the City shall develop and implement strategies to strengthen and diversify the local economy, expand the local tax base, cultivate an entrepreneurial culture and stimulate job creation while preserving and enhancing the natural environment and high quality of life currently enjoyed by local residents and businesses, as well as visitors." - GMP Future Land Use Element Objective 1.6

In 2017, employment is 260,841, and it grew by 1,729 since last year.

New development consists of:

- 656,299 sq. ft. commercial

- 168,675 sq. ft. office
- 423 hotel rooms
- 272,541 sq. ft. industrial
- 18,019 sq. ft. hospital
- 665,262 sq. ft. civic

3. PROJECTS COMPLETED

The following large scale projects received a certificate of occupancy during calendar year 2017. This list includes projects greater than 100 dwelling units and/or 65,000 sq. ft. of non-residential space. For single family development that is built out over time, projects are added to the list when 90% of units in a phase are completed.

Project Name	Case Number	Location	Development Program
Sam's Club	BLD2015-10459	11920 Narcoossee Rd	140,226 sq. ft. retail
Walmart	BLD2016-00660	11930 Narcoossee Rd	193,871 sq. ft. retail
OPD Headquarters	BLD2015-03414	1250 W. South St	96,464 sq. ft. office
Orlando City Soccer Stadium	BLD2015-10414	655 W. Church St	324,086 sq. ft. stadium, 21,980 sq. ft. office (25,500 seats)
Baldwin Harbor	BLD2014-03624	1915 Lakemont Ave	227 du
Landon House	BLD2014-05652	7010 Lake Nona Blvd	279 du
Costco	BLD2015-05112	4696 Gardens Park Blvd	152,476 sq. ft. retail
Innovation Middle School	N/A	13950 Storey Park Blvd	168,562 sq. ft. civic
OCPS Academic Center for Excellence	N/A	400 N. Parramore Ave	242,865 sq. ft. civic
Laureate Park Elementary School	N/A	7800 Laureate Blvd	111,289 sq. ft. civic
Liberty Mini Storage	BLD2016-06911	4912 S. John Young Pkwy	88,760 sq. ft. industrial, 1,240 sq. ft. office
AIPO Warehouse	BLD2017-00353	2904 Tradeport Dr	155,405 sq. ft. industrial
Lowe's at Lake Nona Landing	BLD2016-06477	12276 Andric Lane	157,730 sq. ft. retail
Citi Tower at Eola Park	BLD2015-05751	101 Lake Ave	233 du, 9,517 sq. ft. office
Elan at Audubon Park	BLD2014-06890	950 Warehouse Rd	198 du
Millenia Apartments Phase 2	BLD2015-03595	5056 Millenia Palms Dr	312 du
Addison on Millenia	BLD2015-08010	4655 Gardens Plaza Blvd	212 du

4. PROJECTS APPROVED

The following large scale projects received approval by the Municipal Planning Board, the Southeast Town Design Review Committee, or the Creative Village Development Review Committee during calendar year 2017. This list includes projects greater than 100 dwelling units and/or 65,000 sq. ft. of non-residential space, and any project that received a density or intensity bonus.

Project Name	Case Number	Location	Development Program
Sunbelt Semoran	MPL2016-00012	5461 Hazeltine National Dr	128 room hotel (76,740 sq. ft.)
Sand Lake West Phase III	MPL2017-00004	7501 Greenbriar Pkwy	90,783 sq. ft. office
Broadstone Lakehouse	MPL2017-00006	301 N. Ivanhoe Blvd	260 du, 35,732 sq. ft. office & retail
Infiniti Dealership	MPL2017-00008	4225 Millenia Blvd	92,274 sq. ft. car dealership
Guardian Care	ZON2017-00004	2500 W. Church St	101,500 sq. ft. assisted living facility
Randal Park	MPL2017-00016	9349 Randal Park Blvd	109 du, 86,500 sq. ft. retail
Project 566	ZON2017-00017	6200 International Dr	4,000 hotel rooms & resort
City Furniture	MPL2017-00024	4751 Vineland Rd	120,000 sq. ft. furniture store
East Park	ZON2017-00010	10192 Dowden Rd	60,000 sq. ft. office, 10,000 sq. ft. commercial
Education Village	ZON2017-00015	W of Narcoossee Rd, S of SR 417, N of Tyson Rd	400 du, 350,000 sq. ft. industrial, 75,000 sq. ft. civic
Airport Distribution Center North	MPL2017-00028	4752 Judge Rd	173,321 sq. ft. warehouse
Columbia St. Mixed Use	ZON2017-00013	51 Columbia St	110 room hotel (67,020 sq. ft.)
Rosalind & Livingston	ZON2017-00014	108 E. Livingston St	389 du
Cambria Suites	MPL2017-10009	170 E. Washington St	155 hotel rooms
Titan Primrose	MPL2017-10011	400 N. Primrose Dr	97,500 sq. ft. personal storage, 1,500 sq. ft. retail
Alexan at North End	MPL2017-10012	1820 Michigan Ave	310 du
Millenia Parcel M North	MPL2017-10018	4751 Vineland Rd	102,590 sq. ft. retail, 140 hotel rooms
SED	ZON2017-10009	W. Central Blvd, S. Division Ave, W. Church St, Hughey Ave	200,000 sq. ft. office, 160,000 sq. ft. retail, 250 room hotel, 450 du

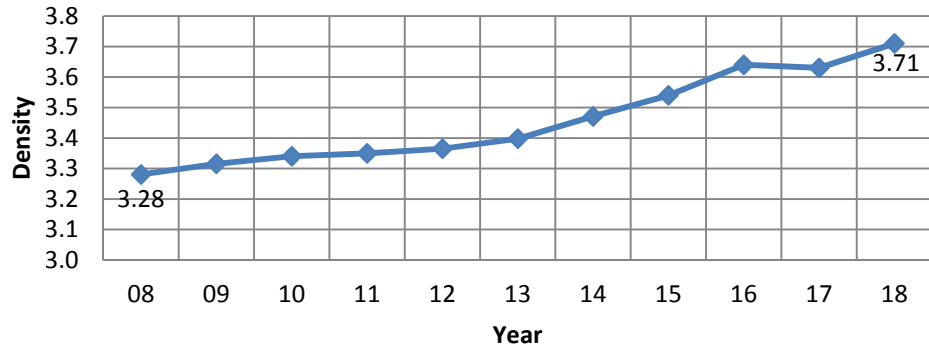
924 Sligh Blvd	CUP2017-10005	924 Sligh Blvd	121,368 sq. ft. personal storage
Carrier Drive Hotel	MPL2017-10028	5871 Carrier Dr	188 room hotel (115,423 sq. ft.)
Grandnational Townplace Suites	MPL2017-10030	5473 Altamira Dr	148 room hotel (96,222 sq. ft.)
Lake Nona Town Center Phase 1B	MPL2017-00001	S of Tavistock Lakes Blvd, N of Veterans Way, W of Lake Nona Blvd	165,000 sq. ft. office
Lake Nona Town Center Phase 2A	MPL2016-00055	S of SR 417, NW of Lake Nona Blvd, E of Boggy Creek Rd	1,241,000 sq. ft. mixed use, 200 room hotel
Office Headquarters at Lake Nona Town Center	MPL2017-10022	S of SR 417, NW of Lake Nona Blvd, E of Boggy Creek Rd	380,178 sq. ft. office, 5,292 restaurant, 103,389 sq. ft. hotel
UCF Dr. Phillips Academic Commons	MPL2017-00020	SE corner of W. Livingston St and N. Terry Ave	148,000 sq. ft. academic building
Amelia Court at Creative Village	MPL2017-00009	SE corner of W. Concord St and N. Parramore Ave	256 du, 10,500 sq. ft. commercial
UCF Student Housing	MPL2017-00018	NW corner of W. Livingston St and N. Terry Ave	126 student housing units, 115,000 sq. ft. of education & commercial space

B. SMART GROWTH INDICATORS

1. RESIDENTIAL DENSITY

“The City shall achieve a compact urban form by maintaining the highest average density and intensity of development in Central Florida.” - GMP Future Land Use Element Objective 1.3

Resident Population / Acres of City Land Area



Population per acre was determined by dividing the City’s population by the sum of the total land area in the City. The City’s population has increased by 5,715 persons since last year and 47,833 in the last 10 years. City land area has increased 19 acres since last year and 4,771 acres in the last 10 years.¹

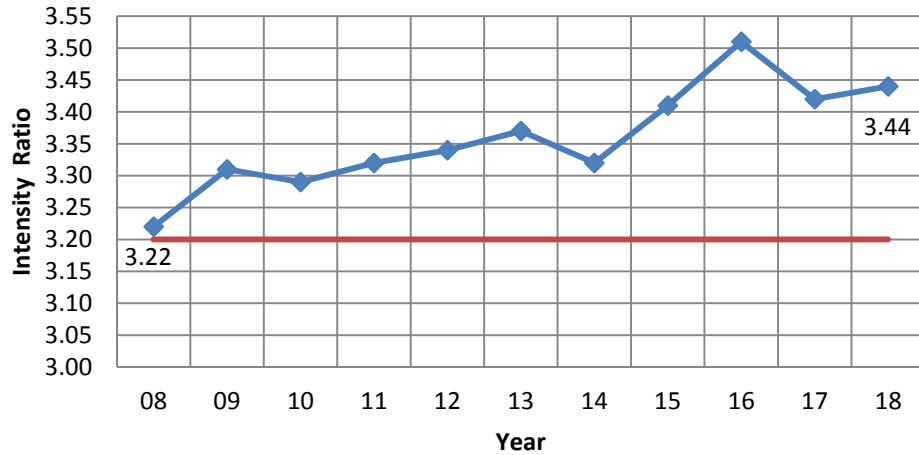
This increase is consistent with the City’s goal to increase residential density. Residential density is expected to rise in the next five years as recently annexed property is developed and downtown redevelopment continues.

¹ Note: Acres of land in the City on January 1, 2018 was calculated as acres of land in the City on January 1, 2017 (75,842) plus acres of land annexed in 2017 (19). The result (75,861) is slightly higher than the acreage calculated using the City GIS system (75,770), but the result is a more accurate indicator of change since last year. The GIS figure is slightly different because the City boundary layer has become more accurate over the years through continuous mapping and technology improvements.

2. EMPLOYMENT DENSITY

A) JOBS PER ACRE

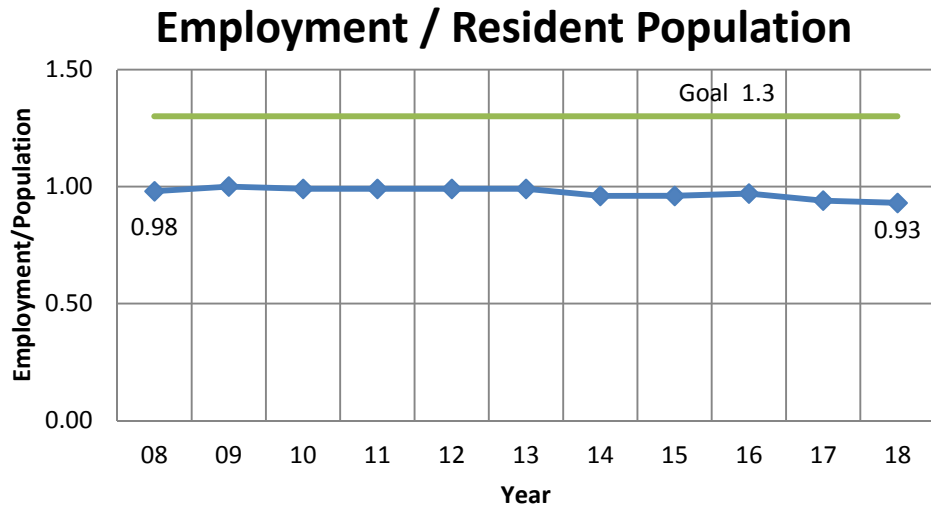
Jobs / Acres of City Land Area



3.2	3.22	3.44	Yes
Goal	2008	2018	Achieved?

Non-Residential Intensity is measured as jobs per acre of City land area. The City gained 1,729 jobs since last year and has gained 31,939 jobs since 2008. The City land area has increased by 19 acres since last year and 4,771 acres in the last 10 years. This data indicates the non-residential intensity in the City increased by 0.6% since last year and increased by 6.8% since 2008. The current ratio of 3.44 exceeds the City’s goal to increase the ratio from 3.07 to 3.2 by 2009. Staff will evaluate creating a new goal for future annual reports.

B) JOBS TO HOUSING RATIO



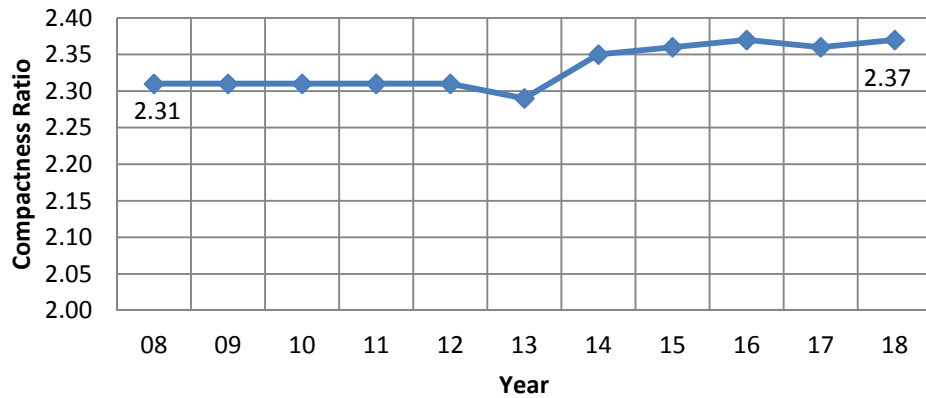
1.02 - 1.3	1.02	0.93	No
Goal	Baseline	2018	Achieved?

Jobs/Housing Balance is measured as a ratio of employment over resident population. The City added 1,729 jobs since last year and added 31,939 jobs since 2008. The resident population increased by 5,715 persons since last year and 47,833 persons in the last 10 years. Based on these figures, the City's jobs/housing balance ratio decreased by 0.01 since last year. These decreases are due to the lingering effects of the recession. In addition, it's possible that more people are working from home, which is not captured in the data. Given strong population growth over the last year, it is expected that job growth will gain momentum over the next year as well. The current ratio of 0.93 is just outside the City's target range of 1.02 to 1.3.

3. COMPACTNESS

A) CITY BOUNDARY

Miles of City Boundary / Square Miles of City Land Area



↓	2.31	2.37	No
Goal	2008	2018	Achieved?

The City’s goal is to increase compactness by eliminating enclaves and smoothing the City’s irregular boundaries. This helps the City to provide services more efficiently. The City annexed 19 acres during the past year. The City boundary has decreased by 0.52 miles since last year. Cumulatively, annexations since 2008 have increased the length by 23 miles. The increase over time is partly due to annexations, and partly due to GIS software that excludes County or State roads that pass between parcels that are inside City limits. The entire outline is included in the miles of City boundary. If the City were to annex roadway areas such as the Greenway (SR 417), the miles of boundary would drop substantially, but from a practical point of view, the City would not change in compactness.

4. MIXED USE DEVELOPMENT

In order to achieve the desired mixture of land uses within activity centers, the following minimum and maximum percentages of total floor area designated for activity centers on the Official Future Land Use Map Series, except Neighborhood Activity Centers, Community Activity Centers and the Downtown Activity Center, shall be occupied by the uses listed below, by the dates shown:

	<u>2045</u>	
	<u>Min.</u>	<u>Max.</u>
Residential	15%	30%
Office	10%	25%
Commercial	30%	50%
Pub/Rec/Inst.	5%	20%
Hospitals	1%	10%
Industrial*	5%	10%

*This percentage applies only in activity centers in which industrial uses are permitted.

- GMP Future Land Use Element Objective 2.1

Maintain Mix of Land Uses Within Urban and Metropolitan Activity Centers			
Res.	15 - 30%	14%	No
Office	10 - 25%	10%	Yes
Com.	30 - 50%	50%	Yes
PRI	5 - 20%	11%	Yes
Hosp.	1 - 10%	4%	Yes
Ind.	5 - 10%	11%	Yes
Use	GMP Goal	2017	Achieved?

In order to achieve and maintain the desired mixture of land uses within mixed use corridors, the percentage of total floor area within mixed use corridors shall be consistent with the ranges provided for each use and target date listed in the following table:

	<u>2045</u>	
	<u>Min.</u>	<u>Max.</u>
Residential	10%	20%
Office	10%	15%
Commercial	30%	55%
Pub/Rec/Inst.	5%	20%
Hospitals	1%	8%
Industrial	5%	15%

- GMP Future Land Use Element Objective 2.2

Maintain Mix of Land Uses Within Mixed Use Corridors			
Res.	10 - 20%	16%	Yes
Office	10 - 15%	33%	No
Com.	30 - 55%	32%	Yes
PRI	5 - 20%	6%	Yes
Hosp.	1 - 8%	2%	Yes
Ind.	5 - 15%	11%	Yes
Use	GMP Goal	2017	Achieved?

Land Use Mix within Urban and Metropolitan Activity Centers and Mixed Use Corridors was determined using the City Land Use Database. Hotels were included in the commercial category. To calculate percentages, single-family and multifamily residential units were converted to square feet using a factor of 950 square feet per multifamily unit and 1,500 square feet per single-family dwelling unit. Hotel rooms have been converted to square feet using a factor of 550 square feet per room. The hotel conversion factor accounts for hotel rooms and accessory restaurants, office and meeting space.

In 2017, the mix of uses within Urban and Metropolitan Activity Centers fell within the target range for office, commercial, hospital, public and industrial. The percentage of residential use was about 1% under the target range for 2045. This result is not considered undesirable because the 2025 goal range for residential has been 10% to 25%. This is still on track to meet the goal in the future.

The Mixed Use Corridor indicator has been reviewed to determine if it meets the target ranges. In 2017, the mix of uses within Mixed Use Corridors fell within the target range for all segments, residential, commercial, public, hospital and industrial. The percentage of office use was about 18% over the target range. Last year, the Mixed Use Corridor office indicator was 33% as well, therefore it is basically unchanged. During the review of the 2016 Evaluation & Appraisal Report, the City's goal for office was reduced from the 2025 goal of 25% to 50% to the 2045 goal of 10% to 15%. This indicator will continued to be monitored to determine if the Mixed Use Corridor office goal will need to be revised.

5. TRANSIT ACCESS

The GMP designates a set of transit corridors, as shown on Figure TE-52. Transit headways are determined for each corridor. The existing public transit levels of service shows that 53% of designated transit corridors are operating at 30 minutes or less. Future transit corridors are also shown. These corridors are areas where the City supports additional density and redevelopment to create more transit demand. This in turn will reduce headways over time, and create an incentive to provide premium transit. For example, Lynx is currently studying the feasibility of providing bus rapid transit along Colonial Drive, one of the City's most high demand transit corridors.

	Population within ¼ mile of Transit Corridor	Percentage of Total Population	Employment within ¼ mile of Transit Corridor	Percentage of Total Employment
Existing Corridors	88,411	32%	78,227	30%
Future Corridors	12,296	4%	10,177	4%

The total City population is 281,053. Approximately 36% live within ¼ mile of an existing or future transit corridor. The total employment is 260,841. Approximately 34% of employment centers are within ¼ mile of an existing or future transit corridor.

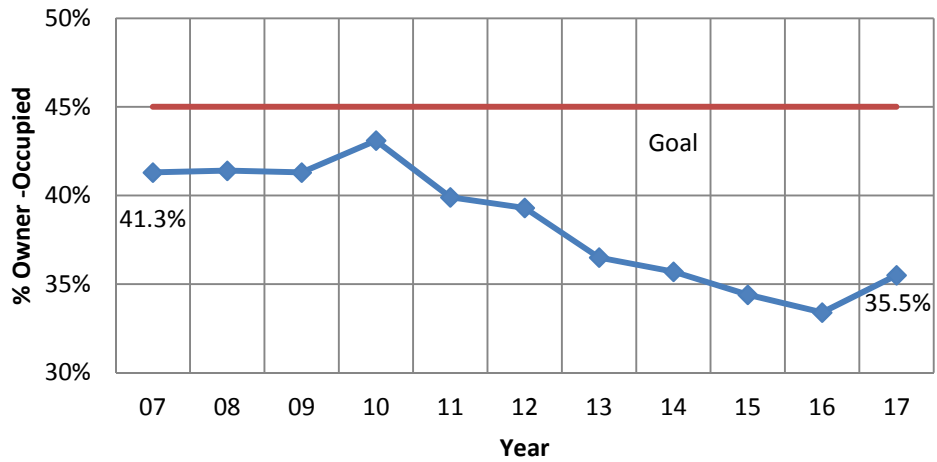
C. HOUSING INDICATORS

1. HOUSING MIX

The Housing Mix is measured by the total number of existing units, both single family and multi-family. The total number of single family units is 41,977 units and the number of multi-family is 91,835 units. The percentage of existing multi-family units is 69%. The annual growth rate of multi-family is 1.9%. This growth can be attributed to the City's growing employment base.

2. HOUSING TENURE

Owner-Occupied Dwelling Units

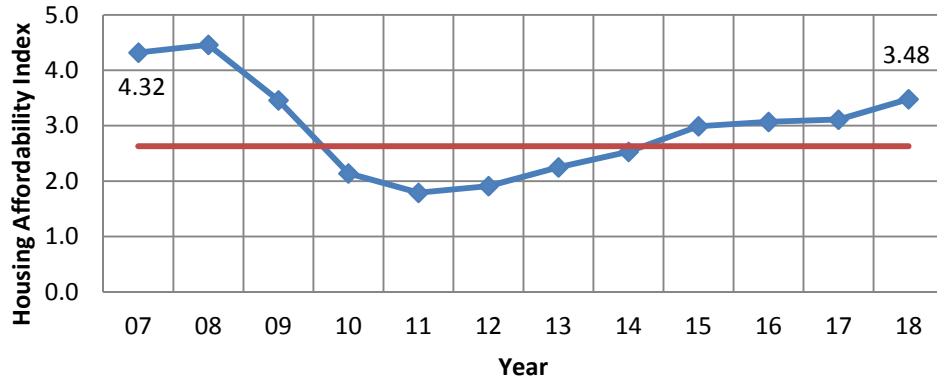


45%	41.3%	35.5%	No
Goal	2007	2017	Achieved?

According to the City Land Use Database there are 133,812 housing units in the City of Orlando at the end of 2017, of which 41,977 are single family units and 91,835 are multifamily units. In an effort to align pertinent housing data with City of Orlando Housing and Community Development household and household cost burden data, additional housing information was drawn from the 2016 ACS (American Community Survey) sources. This data is one year older than City data, therefore results are shown through the beginning of 2017 (reported as 2016 ACS). According to 2016 ACS data for the City of Orlando, there are a reported 126,537 housing units, of which 108,523 (85.8%) are occupied and 18,014 (14.2%) are vacant. Of the occupied units, 38,542 (35.5%) are owner-occupied and 69,981 (64.5%) are renter-occupied. The percentage of owner-occupied units has increased by 2.1% since last year, but is below the 2007 reported rate of 41.3% and the ten year goal of 45%.

3. AFFORDABLE HOUSING

Median Home Sales Price / Average Household Income for Family of Four



Median Home Sales Price / Average Household Income for Family of Four			
<2.63	2.86	3.48	No
Goal	Baseline	2018	Achieved?

Information concerning home prices was obtained from the Orlando Regional Realtor Association for the 4-county Orlando Metropolitan Area (Orange, Seminole, Osceola and Lake counties).² Information concerning median income was obtained from the U.S. Department of Housing & Urban Development.³ According to a report from the Orlando Regional Realtor Association, the median sales price for homes in Metropolitan Orlando in 2017 was \$203,000. This figure is \$23,000 more than last year and \$45,000 less than the peak reported in January 2007. The median income for a family of four in Orange County increased from \$57,800 in 2016 to \$58,400 in 2017. This figure has increased by \$600 since last year and is a \$1,000 increase since 2007.

The City's housing affordability goal is a ratio of 2.63. The City's actual ratio for 2017 was 3.11 and as of January 1, 2018 it is 3.48. This figure is 0.37 more than last year, but is 0.84 below the 2007 baseline of 4.32. Housing prices are once more starting to increase, and affordability is a concern now and could be a greater concern in the near future.

² Orlando Regional Realtor Association, Metropolitan Orlando Housing Trends Summary, 2018 Statistics at a Glance, February 7, 2018, http://c.yimcdn.com/sites/www.orlandorealtors.org/resource/resmgr/docs_market_pulse/housingtrendsummary.pdf

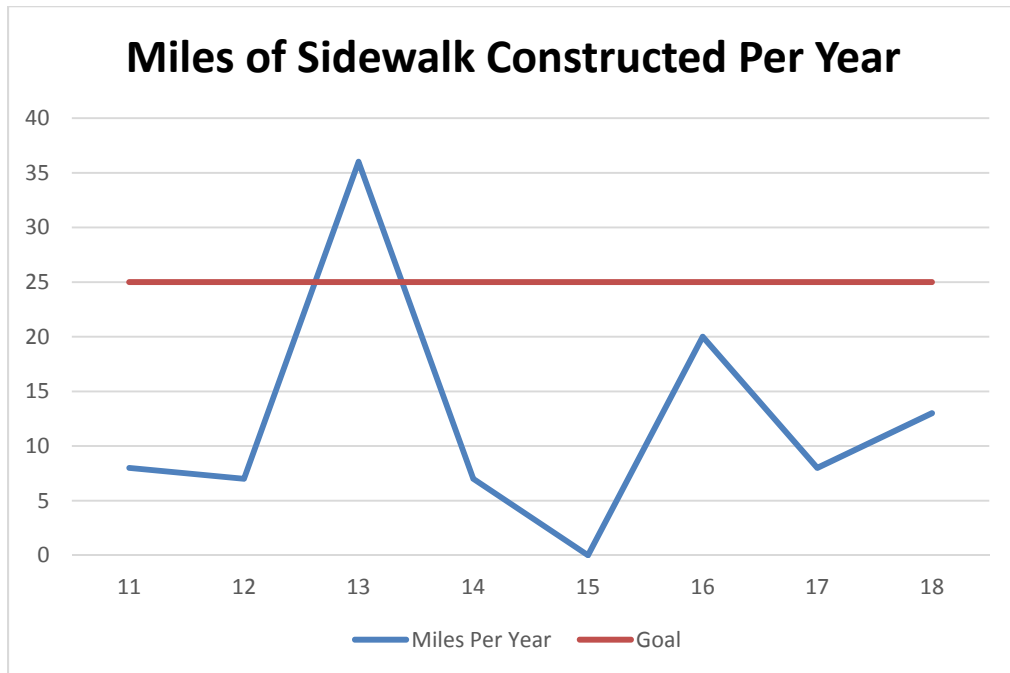
³ U.S. Department of Housing and Urban Development, FY2017 Median Family Income Documentation System, Orlando-Kissimmee, FL MSA Results. <https://sites.google.com/site/floridamortgagelimits/hud-median-income-limits>

D. TRANSPORTATION INDICATORS

1. MULTI-MODAL INFRASTRUCTURE

A) SIDEWALKS

“Throughout the planning period, the City shall ensure completion of the sidewalk and crosswalk system along the major thoroughfare network, within Metropolitan Activity Centers, and within the Traditional City.” - GMP Transportation Element Objective 1.31



+25/yr	13	No
Goal	2017	Achieved?

Pedestrian access is measured as miles of sidewalk. The City’s goal is to add 25 miles of sidewalk per year. The City calculates the total miles of sidewalk every year so the statistics can be reported in the annual budget. The following is an inventory of sidewalk within the City by year:

- 818 miles on January 21, 2010
- 826 miles on January 11, 2011
- 946 miles on January 20, 2012
- 961 miles on August 1, 2013
- 961 miles on August 1, 2014
- 981 miles on August 1, 2015
- 989 miles on August 1, 2016
- 1,002 miles on August 1, 2017

In previous years starting in 2002, the City counted the length of new sidewalk permitted each year and added the mileage to the baseline. The miles of sidewalk reported in January 2010 was substantially more than the amount reported in previous years because in 2009 the City commissioned a consultant to prepare a sidewalk inventory using GIS data and accounting for annexed property with sidewalks. The data was improved again in 2011, resulting in an additional increase.

The Transportation Planning Division reported 13 new miles of sidewalks were constructed by Public Works during 2017. Additional sidewalk was constructed by developers in residential subdivisions, but the City's sidewalk GIS layer has not been updated to reflect this. Given the number of new streets in Randal Park and Laureate Park, and the code requirement to include sidewalks on both sides of each new street, it's possible this goal has been met. The City will continue to update its GIS layer to reflect new development.

B) BIKEWAY FACILITIES

"By 2025, the City shall add at least 60 miles of bikeway facilities to the 361 miles of bikeway facilities already constructed within the City." - GMP Transportation Element Objective 1.26

The City of Orlando currently has 361.5 miles of bikeways. This is an increase of 22.7 miles since last year, and an increase of 203.9 miles since 2003. In 2017, bikeways include:

Bike Paths:	40.49 miles
Bike Lanes:	267.68 miles
<u>Signed Routes:</u>	<u>53.37 miles</u>
TOTAL:	361.54 miles

C) TRANSIT CORRIDORS

LYNX provides bus transit service to the City of Orlando. During the past year, LYNX has updated transit operation to accommodate the region's new commuter rail service, Sunrail. Citywide, there are 156.5 miles of designated Transit Corridors and 106.3 miles or 68% of those corridors currently have LYNX service available for some portion of a typical day.

Sunrail, a commuter train that is a 32 miles long and has 17 stations, serves DeBary in Volusia County on the north to Sand Lake Road in Orange County on the south. It has 4 stations and covers approximately 6 miles in the City of Orlando. Sunrail Phase 2 South is currently under construction which will link Sand Lake Road to Poinciana in Osceola County. The entire Phase 2 South expansion is 17.2 miles and is expected to open in the summer of 2018.

2. ACTIVE TRANSPORTATION

A) WALKSCORE

Walk Score is a website that measures the walkability of any address based on the distance to nearby places and pedestrian friendliness. Orlando has a Walk Score of 42 out of 100 which means that people are car-dependent. Most errands require a car. This score has risen 1 point since last year. There are some individual neighborhoods that have a higher Walk Score. These neighborhoods are South Eola, Central Business District, and Thornton Park. South Eola has a Walk Score of 94, which is considered a Walker's Paradise where daily errands do not require a car. The Central Business District and Thornton Park both have a Walk Score of 85. This means that it is very walkable and most errands can be accomplished on foot. The Walk

Score for Orlando is based on weighted average of scores of many addresses in the City and is available from walkscore.com.

B) BIKESCORE

Bike Score measures whether an area is good for biking based on bike lanes and trails, hills, road connectivity, and destinations. Orlando has a Bike Score of 53 out of 100 which is considered to be bikeable, there is some bike infrastructure. This remains the same since last year. The three neighborhoods with the highest Bike Scores in the City are East Central Park (85), Callahan (85) and Colonialtown South (83). These neighborhoods are considered very bikable which means that biking is convenient for most trips. The Bike Score for Orlando is based on weighted average of scores of many addresses in the City and is available from walkscore.com.

3. VEHICLE MILES TRAVELED

Vehicle miles traveled is defined as a measurement of miles traveled by vehicles in a specified region for a specified time period. According to the Florida Department of Transportation, as of January 1, 2017, the vehicles miles traveled in Orange County was 39,723,296. This is an increase from last year by 2,522,037 or 6.4%.

4. MODE CHOICE

“By 2025, 5 percent of work trips shall be accommodated by public transit.” - GMP Transportation Element Objective 1.3

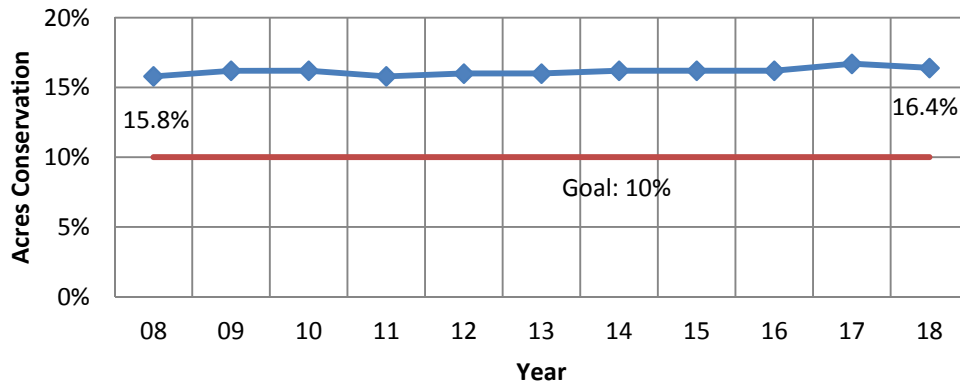
According to 2016 ACS data for the City of Orlando, of the 137,630 workers that travel to work, 79.1% drive a vehicle alone, 8.2% carpool, 4.5% use transit, 1.8% walk to work and 4.5% work from home. Those that chose to use transit decreased by 0.8% from the previous year.

E. ENVIRONMENTAL INDICATORS

1. CONSERVATION ACREAGE

“In keeping with the concepts of sustainability, the citywide level of service standard for open space shall be 20% of the total land area of the City of Orlando. Open space is defined as any land or water surface that affords unobstructed physical movement and is relatively free of man-made structural mass. The level of service standard for open space shall be used as a general guideline, rather than a concurrency requirement.” - GMP Recreation & Open Space Element Policy 1.1.2

Acres of Conservation in City / Total Acres in City



10%	10.8%	16.4%	Yes
Goal	Baseline	2017	Achieved?

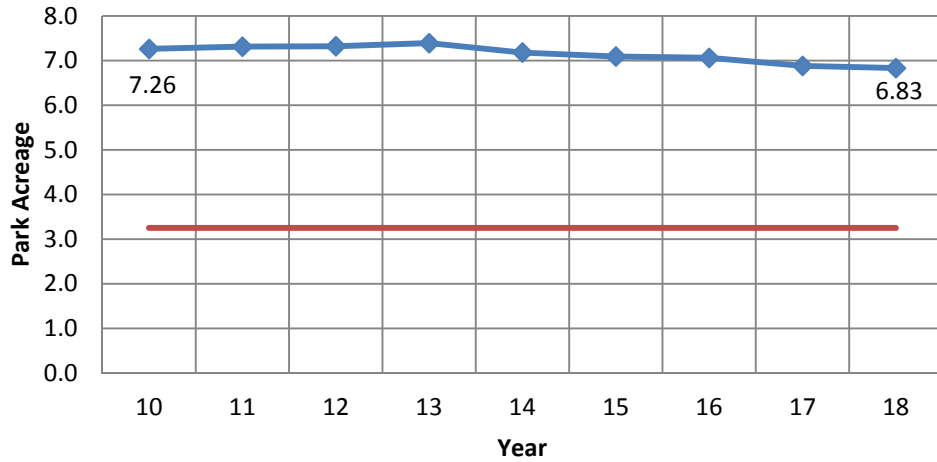
There is currently no accurate way to estimate all open space inside City limits. Open space may occur in any zoning district, may be publicly or privately owned, and may or may not be protected from future development. The next best option is to identify the amount of land that is designated as Conservation on the future land use map. Development is typically not allowed in conservation areas, and in order to remove the conservation designation a public hearing is required. As shown in the chart above, the City does have a high percentage of Conservation acreage, but cannot meet the goal with Conservation area alone.

There are other open spaces in the City, particularly in parks or privately owned undeveloped areas. The City annexed approximately 19 acres during the past year. Conservation acreage is calculated using future land use designations rather than zoning. The amount of Conservation area in the City has decreased 246 acres since last year. This decrease is due to future land use changes which eliminated some Conservation areas for the Vista Park, Starwood, and Judge Meadows developments. Based on these figures, 16.4% of the City land area is Conservation. This figure exceeds the City’s goal of at least 10% Conservation use.

2. PARK ACREAGE

The City's Families, Parks and Recreation Department is responsible for maintaining parks and recreation facilities for all City residents. The Citywide Level of Service standard is 3.25 acres per 1,000 population.

Park Acreage/ Population

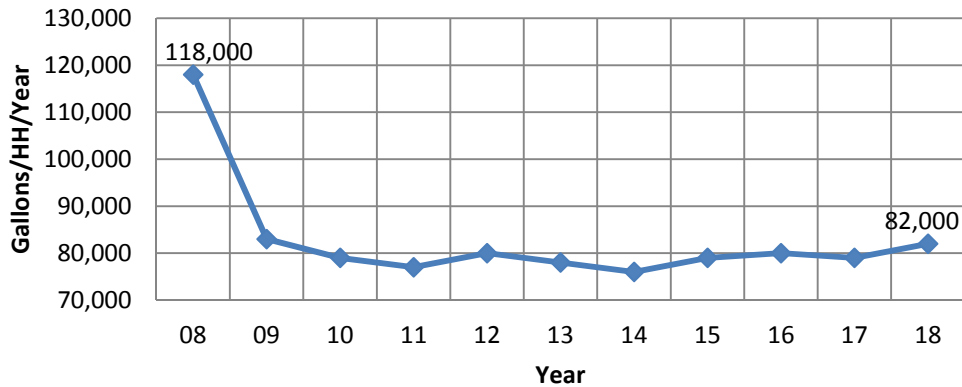


Parks level of service is measured as a ratio of acreage over resident population. The City has 1,919 acres of parks and added 193 acres since 2010. The resident population increased by 5,715 persons since last year and 53,163 persons since 2007. Based on these figures, the City's parks ratio is above the required LOS by 3.58 acres per thousand population. There is currently a surplus of 1,014 acres citywide. Given population growth over the last year and projected growth, it is expected that additional park acreage will be needed in various Community and Neighborhood parks in the future. In addition, demand is high for park facilities such as ballfields and community centers, meaning additional investments will be needed. Two new community parks in the southeast part of the City are currently under construction and should help to improve next year's results.

3. WATER & ENERGY CONSUMPTION

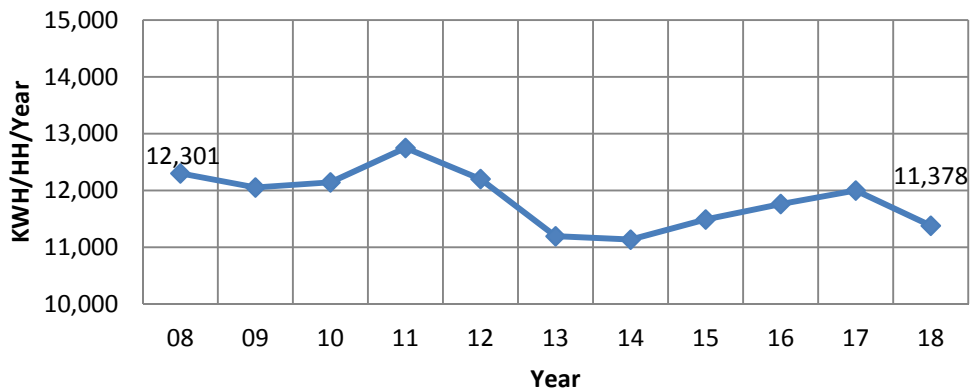
“The City shall reduce total per household potable water demand by an additional 3 percent between 2017 and 2020, and an additional 4 percent by 2040, from a baseline in 2017 of 79,000 gallons per household per year.” - GMP Potable Water Element Objective 1.2.

Annual Average Residential Water Consumption



↓	79,000	82,000	No
Goal	2017 Baseline	2018	Achieved?

Annual Average Residential Electric Consumption



↓	13,109	11,378	Yes
Goal	Baseline	2018	Achieved?

Water and electric consumption figures were obtained from Orlando Utilities Commission (OUC). The data reported by OUC is system-wide and not City specific. The City's goal is to reduce per household water and energy consumption. According to OUC, the water consumption data contained errors from 2008 to 2015. Their 2016 Annual Report corrected those figures for those years. The Annual Average Residential Water Consumption chart in this 2017 Growth Indicators Report has been updated to reflect the corrected changes by OUC.

Current data indicates that per household water consumption increased by 3,000 gallons or 3.7% when compared to last year and decreased by 42% when compared to the 2008 condition. Data also indicates that energy consumption has decreased by 5.2% when compared to last year and decreased by 12.9% when compared to the baseline condition.

The City transmitted a proposed Water Supply Plan to the state planning agency in 2017. The Plan included conservation goals, provisions to address the availability of reclaimed water, and a commitment to pursue alternative water sources (i.e., sources other than the Floridan aquifer). The City adopted the Water Supply Plan on January 27, 2007 and subsequently adopted a Water Supply Plan update on July 7, 2008 to incorporate the findings of the Kissimmee Basin Water Supply Plan. The Central Florida Regional Water Initiative adopted a new regional water supply plan in November 2015. The City has updated its water supply plan in 2016 to incorporate the regional goals.

F. Looking Back and Looking Ahead

Data collected over the last ten years show progress toward meeting many goals. The 2008/2009 recession and subsequent slowdown of development has largely ended and development is returning to pre-recession levels. As of 2018, the City of Orlando:

- Met its community development goals for residential and non-residential density (B1), jobs per acre (B2a), miles of transit corridors (D1c), conservation (E1), parks (E2) and energy consumption (E3b).
- Partially met its community development goals for mixed use development in Metropolitan & Urban Activity Centers and Mixed Use Corridors (B4).
- Did not meet its community development goals for compactness (B3a), jobs/housing balance (B2b), percentage of owner-occupied dwelling units city-wide (C2), affordable housing (C3), and number of new sidewalks (D1a), vehicles miles traveled (D3), transit mode choice to work (D4) and water consumption (E3b).

Major planning accomplishments in 2017 included:

- Update to the City's Water Supply Plan completed.
- Evaluation and Appraisal Report (EAR-Based) GMP Amendments completed.
- Virginia Lake Highland Transportation and Land Use Study and Virginia Drive Special Plan.
- Code amendments addressing Duplexes, the Digital Billboard Exchange Program, Airport Zoning regulations, Personal Storage Standards, Medical Cannabis – Location and Performance Standards, Commercial and Multi-family Recycling, Major Thoroughfare Plan, Certificates of Use regulations and review process, Short Term Rental regulations.

- Greenworks Municipal Operations Sustainability Plan Progress Report which outlines the goals, benchmarks and action items that City offices and employees are taking to advance sustainable practices.

In addition, the following specific activities will be addressed in 2018:

- Evaluate provision of City services in the fast-growing Southeast area.
- Downtown DRI Rescission
- Mercy Drive Vision Plan and GMP amendments.
- OBT Next Master Plan and Implementation Plan for improvements of the Orange Blossom Trail corridor and the Holden Heights Area.
- Affordable House Policies update to incorporate goals and findings outlined in the 2017 Final Report of the Affordable Housing Workgroup.

* * *

EXHIBIT 1

Baseline Conditions & Community Development Goals

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2006	1/1/2007	1/1/2008	1/1/2009	1/1/2010	1/1/2011	1/1/2012	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	Change from Previous Year	Community Development Goal
A1	Population Total Single Family Units Multifamily Units		221,138	227,890	233,220	235,860	237,640	239,235	240,350	242,908	253,355	258,583	265,531	275,338	281,053	5,715	376,110 projected by 2045
													40,964	41,444	41,977	533	
													87,564	90,141	91,835	1,694	
A2	Employment Total New Growth Office sq. ft. Retail sq. ft. Hotel sq. ft. Indust sq. ft. Hospital sq. ft. Civic sq. ft.		215,161	226,364	228,902	235,417	234,076	237,200	238,753	240,839	242,412	248,966	256,148	259,112	260,841	1,729	Increase
													95,124	143,170	168,675	25,505	
													230,733	496,882	656,299	159,417	
													507	1,291	423	(868)	
													1,461,909	641,035	272,541	(368,494)	
													1,641,654	-	18,019	18,019	
													6,289	146,077	665,262	519,185	
B1	Population density per sq mile	Population / Acres of City Land Area	221,138 70,280 3.15	227,890 70,528 3.23	233,220 71,090 3.28	235,860 71,137 3.32	237,640 71,140 3.34	239,235 71,422 3.35	240,350 71,425 3.37	242,908 71,489 3.40	253,355 72,990 3.47	258,583 73,042 3.54	265,531 73,045 3.64	275,338 75,842 3.63	281,053 75,861 3.71	5,715 19 0.08	Increase
B2a	Non-Residential Intensity	Jobs / Acres of City Land Area	215,161 70,280 3.06	226,364 70,528 3.21	228,902 71,090 3.22	235,417 71,137 3.31	234,076 71,140 3.29	237,200 71,422 3.32	238,753 71,425 3.34	240,839 71,489 3.37	242,412 72,990 3.32	248,966 73,042 3.41	256,148 73,045 3.51	259,112 75,842 3.42	260,841 75,861 3.44	1,729 19 0.02	Increase
B2b	Jobs/Housing Balance	Employment / Resident population	215,161 221,138 0.97	226,364 227,890 0.99	228,902 233,220 0.98	235,417 235,860 1.00	234,076 237,640 0.99	237,200 239,235 0.99	238,753 240,350 0.99	240,839 242,908 0.99	242,412 253,355 0.96	248,966 258,583 0.96	256,148 265,531 0.97	259,112 275,338 0.94	260,841 281,053 0.93	1,729 5,715 0.30	Maintain ratio between 1.0 and 1.3.
B3a	Compactness	Miles of City boundary / Sq. Miles of City Land Area	247.4 109.8 2.25	249.7 110.2 2.27	256.6 111.1 2.31	257.2 111.2 2.31	256.9 111.2 2.31	257.55 111.6 2.31	257.60 111.6 2.31	256.13 111.7 2.29	268.00 114.0 2.35	269.71 114.1 2.36	270.00 114.0 2.37	279.88 118.4 2.36	279.36 118.0 2.37	(0.52) (0.4) 0.01	Decrease ratio
B4	Mixed-use development.	Maintain mix of land uses within Urban and Metropolitan Activity Centers, as provided in GMP Objective 2.1	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017		
		Residential	9%	13%	11%	11%	12%	11%	12%	14%	14%	13%	14%	13%	14%	1%	2045 Min. 15% 2045 Max. 30%
		Office	10%	8%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	0%	10% 25%
		Commercial	52%	54%	50%	50%	52%	52%	52%	50%	50%	51%	50%	50%	50%	0%	30% 50%
		Public, Recreational, Institutional	11%	9%	11%	10%	10%	12%	10%	11%	11%	11%	11%	11%	11%	0%	5% 20%
		Hospital	6%	6%	6%	8%	4%	4%	4%	4%	4%	5%	5%	5%	4%	-1%	1% 10%
		Industrial	12%	10%	12%	11%	12%	12%	12%	11%	11%	10%	10%	11%	11%	0%	5% 10%
		TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%		
	Mixed-use development.	Maintain mix of land uses within Mixed Use Corridor, as provided in GMP Objective 2.2	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017		
		Residential												17%	16%	-1%	2045 Min. 10% 2045 Max. 20%
		Office												33%	33%	0%	10% 15%
		Commercial												31%	32%	1%	30% 55%
		Public, Recreational, Institutional												6%	6%	0%	5% 20%
		Hospital												2%	2%	0%	1% 8%
		Industrial												11%	11%	0%	5% 15%
		TOTAL												100%	100%		
B5	Transit Access	Population within 1/4 mile of Transit Corridor Employment within 1/4 mile of Transit Corridor										116,883	117,614	95,030	88,411	(6,619)	Increase
												154,053	155,403	94,664	78,227	(16,437)	
C1	Housing Mix	Percent multifamily (existing) Percent multifamily (annual growth)									67.79%	67.97%	68.13%	68.50%	68.63%		Monitor trends
												1.9%	2.9%	1.9%	1%		
C2	Housing Tenure	Owner-Occupied / Total Occupied = % Owner-Occupied Renter-Occupied / Total Occupied =	39,977 96,947 41.2%	41,166 99,612 41.3%	41,626 100,568 41.4%	42,210 102,204 41.3%	42,272 98,146 43.1%	38,569 96,753 39.9%	38,479 97,918 39.3%	37,425 102,564 36.5%	36,986 103,466 35.7%	37,733 109,685 34.4%	37,094 111,100 33.4%	38,542 108,523 35.5%	Not yet available		Increase
			56,970 96,947	58,446 99,612	58,942 100,568	59,994 102,204	55,874 98,146	58,184 96,753	59,439 97,918	65,139 102,564	66,480 103,466	71,952 109,685	74,006 111,100	69,981 108,523	Not yet available		

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2006	1/1/2007	1/1/2008	1/1/2009	1/1/2010	1/1/2011	1/1/2012	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	Change from Previous Year	Community Development Goal		
		% Renter-Occupied	58.8%	58.7%	58.6%	58.7%	56.9%	60.1%	60.7%	63.5%	64.3%	65.6%	66.6%	64.5%		-2.1%			
C3	Affordable Housing Ownership	Median home sales price / Average household income for family of four	\$239,900 \$55,100 4.35	\$248,000 \$57,400 4.32	\$245,000 \$54,900 4.46	\$205,000 \$59,200 3.46	\$130,000 \$60,700 2.14	\$109,000 \$60,900 1.79	\$109,900 \$57,400 1.91	\$129,000 \$57,400 2.25	\$148,000 \$58,500 2.53	\$164,000 \$54,800 2.99	\$178,788 \$58,300 3.07	\$180,000 \$57,800 3.11	\$203,000 \$58,400 3.48	\$23,000 \$600 0.37	Maintain ratio less than 2.7		
D1a	Pedestrian Access	Miles of sidewalk	August 2005: 560	August 2006: 578.1	August 2007: 592	September 2008: 599	January 21, 2010: 818 <small>Note: Change from previous year reflects 2009 sidewalk inventory.</small>	January 11, 2011: 826	January 20, 2012: 946 <small>Note: Change from previous year reflects 2011 sidewalk inventory.</small>	Aug. 1, 2012 (CAR): 947	Aug. 1, 2013 (CAR): 961	Aug. 1, 2014 (CAR): 961	Aug. 1, 2015 (CAR): 981	Aug. 1, 2016 (CAR): 989	Aug. 1, 2017 (CAR): 1002		13	Add 4 miles per year.	
D1b	Miles of bike infrastructure								280.1	293.2	317.6	317.6	322.4	338.8	361.5		22.7	Build 20 miles between 2010 and 2014.	
D1c	Miles of Transit Corridors								155.8	155.8	155.8	155.8	155.8	155.8	156.5		0.7	Increase	
D2a	Walkscore												39	39	41	42		1	Increase
D2b	Bikescore												52	53	53	53		0	Increase
D3	VMT (County) per person per day			34,663,274	36,029,040	35,436,426	35,586,328	35,657,527	33,325,315	34,099,958	34,904,854	36,389,540	37,201,259	39,723,296	Not yet available	6.4%	Decrease		
D4	Work commute Mode split						Drive Alone 78.1%, Carpool 9.7%, Transit 4.9%, Walk 1.8%, Other 2.0%, Work Home 3.5%	Drive Alone 77.3%, Carpool 11.3%, Transit 3.1%, Walk 1.4%, Other 2.2%, Work Home 4.7%	Drive Alone 79.4%, Carpool 7%, Transit 6.3%, Walk 2.7%, Other 1.9%, Work Home 2.8%	Drive Alone 79.3%, Carpool 8.6%, Transit 5%, Walk 1.8%, Other 2.2%, Work Home 3.1%	Drive Alone 79%, Carpool 8%, Transit 4.6%, Walk 1.9%, Other 2%, Work Home 4.5%	Drive Alone 77.3%, Carpool 10.6%, Transit 3.9%, Walk 1.6%, Other 1.6%, Work Home 5%	Drive Alone 79.6%, Carpool 6.6%, Transit 5.3%, Walk 1.3%, Other 2.3%, Work Home 4.9%	Drive Alone 79.1%, Carpool 8.2%, Transit 4.5%, Walk 1.8%, Other 1.9%, Work Home 4.5%	Not yet available	Drive Alone -0.5%, Carpool +1.6%, Transit -0.8%, Walk +0.5%, Other -0.4%, Work Home -0.4%	Transit 5% or more		
E1	Conservation	Acres of Conservation in City / Total acres in City	7,755 70,280 11.0%	10,645 70,528 15.1%	11,258 71,090 15.8%	11,549 71,137 16.2%	11,499 71,140 16.2%	11,254 71,422 15.8%	11,408 71,425 16.0%	11,405 71,489 16.0%	11,797 72,990 16.2%	11,854 73,042 16.2%	11,854 73,045 16.2%	12,687 75,842 16.7%	12,441 75,861 16.4%	(246) 19 -0.3%	20% open space, of which at least 10% conservation.		
E2	Parks	Acres of Parks in City / Population					1,726 237,640 7.26%	1,749 239,235 7.31%	1,760 240,350 7.32%	1,795 242,908 7.39%	1,818 253,355 7.18%	1,833 258,583 7.09%	1,875 265,531 7.06%	1,893 275,338 6.88%	1,919 281,053 6.83%	26 5,715 -0.05%	At least 3.25 acres per 1,000 population.		
E3b	Per household water consumption	Annual average residential water consumption (per household) in gallons per year.	141,000	140,000	118,000	83,000	79,000	77,000	80,000	78,000	76,000	79,000	80,000	79,000	82,000		3,000	Decrease	
		* Figures obtained from OUC Annual Report.	as of September 30, 2005*	as of September 30, 2006*	as of September 30, 2007*	as of September 30, 2008*	as of September 30, 2009*	as of September 30, 2010*	as of September 30, 2011*	as of September 30, 2012*	as of September 30, 2013*	as of September 30, 2014*	as of September 30, 2015*	as of September 30, 2016*	as of September 30, 2017*		3.7%		
E3b	Per household energy consumption	Annual average residential electric consumption (per household) in KWH.	13,058	12,908	12,301	12,052	12,143	12,748	12,200	11,192	11,134	11,488	11,760	11,999	11,378		-621	Decrease	

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2006	1/1/2007	1/1/2008	1/1/2009	1/1/2010	1/1/2011	1/1/2012	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	Change from Previous Year	Community Development Goal
	* Figures obtained from OUC Annual Report.	Data is system wide (not City-specific).	as of September 30, 2005*	as of September 30, 2006*	as of September 30, 2007*	as of September 30, 2008*	as of September 30, 2009*	as of September 30, 2010*	as of September 30, 2011*	as of September 30, 2012*	as of September 30, 2013*	as of September 30, 2014*	as of September 30, 2015*	as of September 30, 2016*	as of September 30, 2017*	5.2%	

Source: City of Orlando Economic Development Department, City Planning Division March 2018