

---

# GROWTH MANAGEMENT PLAN INDICATORS

## 2018 ANNUAL REPORT

(January 1, 2018– December 31, 2018)

*March 1, 2019*



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

---

# TABLE OF CONTENTS

- A. Growth in 2018 ..... 1
  - 1. Population..... 1
  - 2. Employment..... 1
  - 3. Projects completed ..... 2
  - 4. Projects approved (including bonuses)..... 2
  
- B. Smart Growth Indicators ..... 5
  - 1. Residential Density ..... 5
    - a) Resident Population per Developable Acre.....5
  - 2. Employment Density..... 6
    - a) Jobs per Acre ..... 6
    - b) Jobs to Housing Ratio ..... 7
  - 3. Compactness..... 8
    - a) City Boundary ..... 8
  - 4. Mixed Use Development ..... 9
  - 5. Transit Access..... 11
  
- C. Housing Indicators..... 11
  - 1. Housing Mix ..... 11
  - 2. Housing Tenure..... 12
  - 3. Affordable Housing ..... 13
  
- D. Transportation Indicators..... 14
  - 1. Multi-modal Infrastructure ..... 14
    - a) Sidewalks..... 14
    - b) Bicycle Infrastructure ..... 15
    - c) Transit Corridors ..... 15
  - 2. Active Transportation ..... 15
    - a) Walkscore ..... 15
    - b) Bikescore ..... 16
  - 3. Vehicle Miles Traveled ..... 16
  - 4. Mode Choice ..... 16
  
- E. Environmental Indicators ..... 17
  - 1. Conservation Acreage ..... 17
  - 2. Park Acreage ..... 18
  - 3. Water & Energy Consumption ..... 19
  
- F. Looking Back and Looking Ahead ..... 20

---

## EXHIBITS

Exhibit 1: Baseline Conditions and Annual Indicators

---

## CONTRIBUTORS

Dean Grandin, AICP, City Planning Division Manager  
Paul Lewis, FAICP, Chief Planning Manager, City Planning Division  
Elisabeth Dang, AICP, Chief Planner, Comprehensive Planning Studio  
Colandra Jones, AICP, Planner III, Comprehensive Planning Studio  
Megan Barrow, Planner I, Comprehensive Planning Studio  
Yolanda Ortiz, Planner I, Comprehensive Planning Studio  
Mike Mills, GIS Analyst, Mapping Analysis Planning Group  
John Rhoades, Transportation Systems Analyst, Transportation Department  
Ian Sikonia, AICP, Planner III, Transportation Department  
Linda Rhinesmith, AICP, Housing Division Manager

---

# CITY OF ORLANDO

## GROWTH MANAGEMENT PLAN INDICATORS

### 2018 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 2018

##### 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 2018, population is 285,210, and it grew by 4,157 since last year.

New development consists of:

- 450 single family units
- 487 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 2018, employment is 264,980, and it grew by 4,139 since last year.

New development consists of:

- 428,950 sq. ft. commercial

- 299,854 sq. ft. office
- 1,217 hotel rooms
- 557,834 sq. ft. industrial
- 19,468 sq. ft. hospital
- 432,868 sq. ft. civic

### 3. PROJECTS COMPLETED

The following large scale projects received a certificate of occupancy during calendar year 2018. 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
Center of Commerce Warehouse	BLD2017-01679	4401 Shader Rd	93,679 sq. ft. industrial
Princeton Oaks Warehouse	BLD2016-06073	3419 W.D. Judge Dr	110,860 sq. ft. industrial
	BLD2016-06075	3401 W.D. Judge Dr	120,172 sq. ft. industrial
Megastron	BLD2015-03168	7079 S. Kirkman Rd	100,455 sq. ft. office; 33,473 sq. ft. retail
Sand Lake West	BLD2017-03176	7501 Greenbriar Pkwy	90,783 sq. ft. office
Warehouse for POD	BLD2017-04801	7133 Municipal Dr	170,428 sq. ft. industrial
Orange Ave Self Storage	BLD2016-05885	3820 S. Orange Ave	89,123 sq. ft. industrial
Lake Como K-8	N/A	901 S. Bumby Ave	154,255 sq. ft. civic
Audubon K-8	N/A	1500 Falcon Dr	165,608 sq. ft. civic
ADC North	BLD2016-05848	6843 Conway Rd	101,747 sq. ft. industrial
Lake Nona Town Center Office	BLD2016-06481	13485 Veterans Way	80,652 sq. ft. office

### 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 2018. 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
Beltway Commerce Center	MPL2017-10035	E of SR 417 & S of LeeVista Blvd.	240,000 sq. ft. & 324,000 sq. ft. warehouse

Contractor's Business Park	MPL2017-10026	2140 N. John Young Pkwy	176,025 sq. ft. warehouse
Starwood N-1B & 1C	MPL2017-10045	S of SR 528 & E of SR 417	324 du
Colonial Magnolia	MPL2017-10029	107 Hillcrest St.	96,900 sq. ft. personal storage 11,900 sq. ft. retail
Park Central Apartments	MPL2017-10042	2429 Americana Blvd.	215 du
Omega Plaza Town Place Suites	MPL2018-10002	5600 Butler National Dr.	112,677 sq. ft. hotel (164 rooms)
Conroy Personal Storage	CUP2018-10002	5874 Michelle Lee Lane	91,350 sq. ft. personal storage
VIB Best Western Hotel	MPL2018-10009	6805 Visitors Circle	65,130 sq. ft. hotel (120 rooms)
Goldenrod Commerce Center	MPL2018-10016	W of S. Goldenrod Rd & S of Marketplace Dr.	103,142 sq. ft. personal storage & 1,500 sq. ft. retail
Poitras East PD	ZON2017-00011	W of Narcoossee Rd, N & E of Boggy Creek Rd.	2,734 du & 100,000 sq. ft. non-residential
Nona Cove PD	ZON2018-10004	14768 & 14806 Narcoossee Rd; 19463 & 19451 Boggy Creek Rd.	260 du, 124,000 sq. ft. personal storage & 45,000 sq. ft. retail
Golden Sparrow	MPL2017-10017	434 N. Orange Ave.	889 du & 120,000 sq. ft. retail
500 N. Orange Ave Office & Commercial	MPL2017-00026	500 N. Orange Ave.	116,650 sq. ft. office & retail
North Magnolia Hotel	MPL2018-10023	409 N. Magnolia Ave.	140,904 sq. ft. hotel (240 rooms)
1400 Grand St. Warehouse	MPL2018-10035	1216 S. Orange Blossom Trail	268,525 sq. ft. warehouses
College Park West	ZON2018-10012	3125 Shader Rd.	203 du
Millenia Lakes	MPL2018-10034	5450 Millenia Lakes Blvd.	331 du
Pinewood Reserve	MPL2018-10048	N of Lee Vista Blvd, W of Young Pine Rd, E of SR 417, & S of Waterside Point Circle	465 du
Gardens on Millenia Parcel K	MPL2018-10049	3692 Cathy St.	350 du
Rise Multi-family in Metrowest	MPL2018-10050	6003 Raleigh St.	442 du & 10,000 sq. ft. retail
Airport Commerce Center	MPL2018-10057	9197 Boggy Creek Rd.	82,000 sq. ft. warehouse
Orlando Health Randal Park	MPL2018-10059	9349 Randal Park Blvd.	573,149 sq. ft. hospital

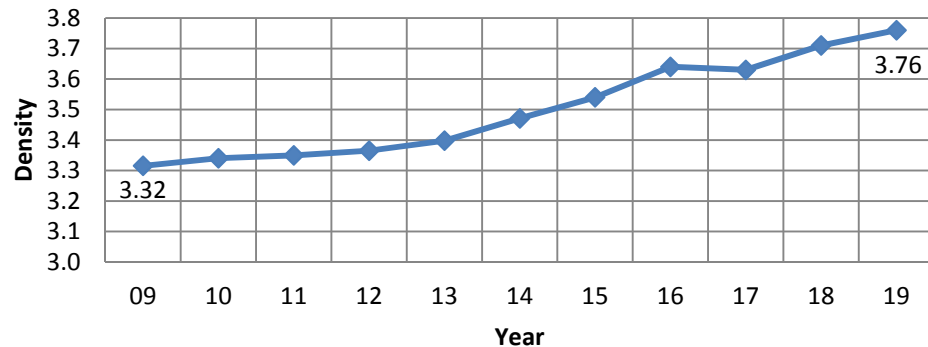
Zoi House Orlando	MPL2018-10066	30 E. Livingston St & 367 N. Orange Ave.	300 du, 10,000 sq. ft. retail, 130,000 sq. ft. office
Sabin Hilton Garden Inn	MPL2018-10068	4811 Millenia Blvd.	129 room hotel
The Packing District	ZON2018-10023	W. Princeton St & N. Orange Blossom Trail between N. John Young Pkwy & CSX Rail	8,658 du & 3,736,045 sq. ft. industrial & commercial
Alexan North End	MPL2018-10079	745 Clay St; 1854, 1860, 1880, 1900 Oglesby Ave.	222 du
Nona Village Center	ZON2018-10028	11200 Narcoossee Rd.	54,250 sq. ft. retail, restaurant & office; 140,000 sq. ft. hotel (250 rooms)
Orange & Robinson Apartments	ZON2018-10030	336 N. Orange Ave.	327 du
Laureate Park Phase 4	MPL2017-10037	S and W of Laureate Blvd, E of Kellogg Dr. & Centerline Dr.	193 du
Hotel at Lake Nona Parcel 10	MPL2017-10044	S of Lake Nona, N of Wellspring Dr. & E of USTA Blvd.	82 du and 272,336 sq. ft. hotel (257 rooms)
Medical Office at Lake Nona Mixed Use District	MPL2017-10050	E of Lake Nona Blvd, S of Nemours Pkwy, N of Tavistock Lakes Blvd.	70,000 sq. ft. medical office
Tyson's Corner II Tract A	MPL2018-10010	N of Tyson Rd, E of Narcoossee Rd, S of Clear Vista St.	71,650 sq. ft. commercial
UCF Hospital at Lake Nona	MPL2018-10012	S of Lake Nona Blvd, N of Laureate Blvd, W of Veterans Way, E of Humbolt Dr.	198,168 sq. ft. hospital (64 beds) & 60,000 sq. ft. medical office
Laureate Park Phase 10	MPL2018-10013	N of Nemours Pkwy, S of SR 417, W of Bovet Ave.	250 du
Lake Nona Town Center 2A	MPL2018-10019	S of SR 417, NW of Lake Nona Blvd, E of Boggy Creek Rd.	1.33 million sq. ft. non-residential & 215 room hotel
Project Olympus	MPL2018-10051	SW corner of Laureate Blvd & Medical City Dr.	200,700 sq. ft. manufacturing, warehouse, office
Tyson's Corner Self Storage	MPL2018-10052	N of Tyson Rd, E of Narcoossee Rd, S of Clear Vista St.	84,375 sq. ft. personal storage
Poitras East Neighborhood 6	MPL2018-10063	W of Narcoossee Rd and N of Boggy Creek Rd.	507 du
Poitras East Neighborhood 7	MPL2018-10080	W of Narcoossee Rd and N of Boggy Creek Rd.	200 du

## 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 4,157 persons since last year and 49,350 in the last 10 years. City land area has increased 39 acres since last year and 4,763 acres in the last 10 years.<sup>1</sup>

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.

---

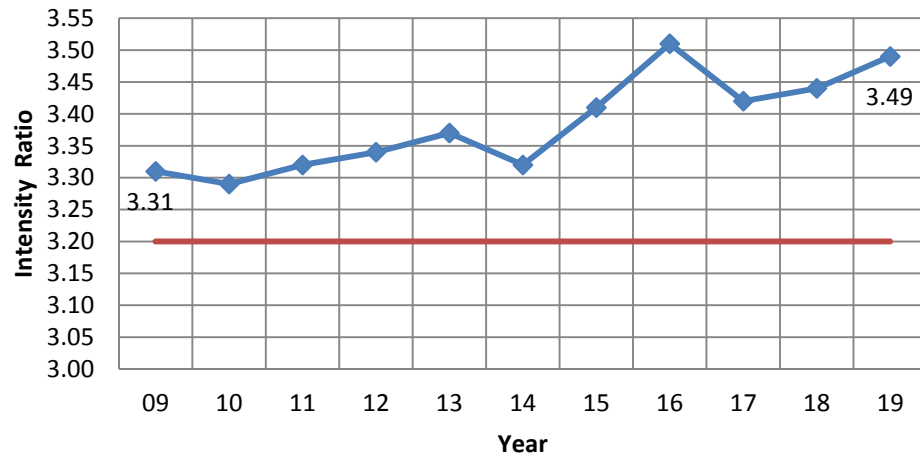
<sup>1</sup> Note: Acres of land in the City on January 1, 2019 was calculated as acres of land in the City on January 1, 2018 (75,861) plus acres of land annexed in 2018 (39). The result (75,900) is higher than the acreage calculated using the City GIS system (75,808), but the result is a more accurate 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

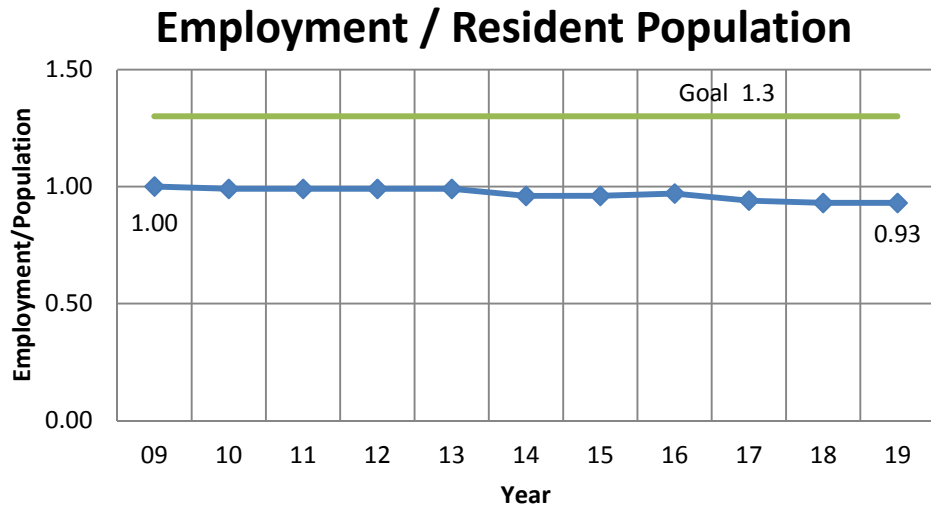
#### Jobs / Acres of City Land Area



<b>3.2</b>	<b>3.31</b>	<b>3.49</b>	<b>Yes</b>
Goal	2009	2019	Achieved?

Non-Residential Intensity is measured as jobs per acre of City land area. The City gained 4,139 jobs since last year and has gained 29,563 jobs since 2009. The City land area has increased by 39 acres since last year and 4,763 acres in the last 10 years. This data indicates the non-residential intensity in the City increased by 0.05% since last year. The current ratio of 3.49 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**



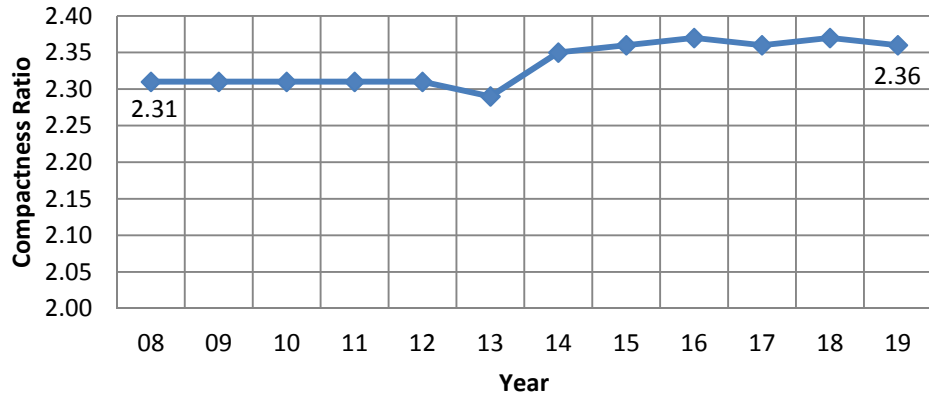
<b>1.02 - 1.3</b>	<b>1.02</b>	<b>0.93</b>	<b>No</b>
Goal	Baseline	2019	Achieved?

Jobs/Housing Balance is measured as a ratio of employment over resident population. The City added 4,139 jobs since last year and added 29,563 jobs since 2009. The resident population increased by 4,157 persons since last year and 49,350 persons in the last 10 years. Based on these figures, the City’s jobs/housing balance ratio remained the same since last year. It’s also 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



↓	<b>2.31</b>	<b>2.36</b>	<b>No</b>
Goal	2008	2019	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 39 acres during the past year. The City boundary has increased by 0.59 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

<b>Maintain Mix of Land Uses Within Urban and Metropolitan Activity Centers</b>			
<b>Res.</b>	<b>15 - 30%</b>	<b>14%</b>	<b>No</b>
<b>Office</b>	<b>10 - 25%</b>	<b>10%</b>	<b>Yes</b>
<b>Com.</b>	<b>30 - 50%</b>	<b>51%</b>	<b>No</b>
<b>PRI</b>	<b>5 - 20%</b>	<b>11%</b>	<b>Yes</b>
<b>Hosp.</b>	<b>1 - 10%</b>	<b>4%</b>	<b>Yes</b>
<b>Ind.</b>	<b>5 - 10%</b>	<b>10%</b>	<b>Yes</b>
<b>Use</b>	<b>GMP Goal</b>	<b>2018</b>	<b>Achieved?</b>

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

<b>Maintain Mix of Land Uses Within Mixed Use Corridors</b>			
<b>Res.</b>	<b>10 - 20%</b>	<b>16%</b>	<b>Yes</b>
<b>Office</b>	<b>10 - 15%</b>	<b>33%</b>	<b>No</b>
<b>Com.</b>	<b>30 - 55%</b>	<b>31%</b>	<b>Yes</b>
<b>PRI</b>	<b>5 - 20%</b>	<b>6%</b>	<b>Yes</b>
<b>Hosp.</b>	<b>1 - 8%</b>	<b>2%</b>	<b>Yes</b>
<b>Ind.</b>	<b>5 - 15%</b>	<b>12%</b>	<b>Yes</b>
<b>Use</b>	<b>GMP Goal</b>	<b>2018</b>	<b>Achieved?</b>

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 2018, the mix of uses within Urban and Metropolitan Activity Centers fell within the target range for office, 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%. The percentage of commercial use was about 1% over the target range. 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 2018, 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 285,210. Approximately 36% live within ¼ mile of an existing or future transit corridor. The total employment is 264,980. Approximately 34% of employment centers are within ¼ mile of an existing or future transit corridor.

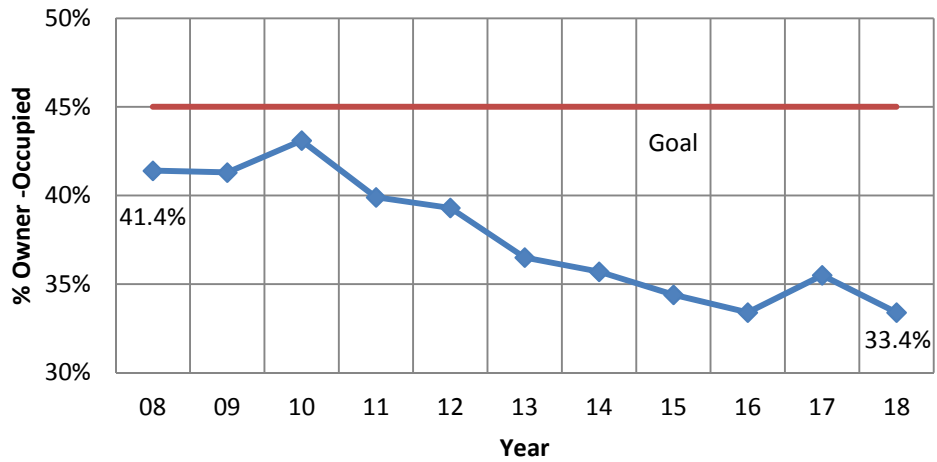
## C. HOUSING INDICATORS

### 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 42,429 units and the number of multi-family is 92,241 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

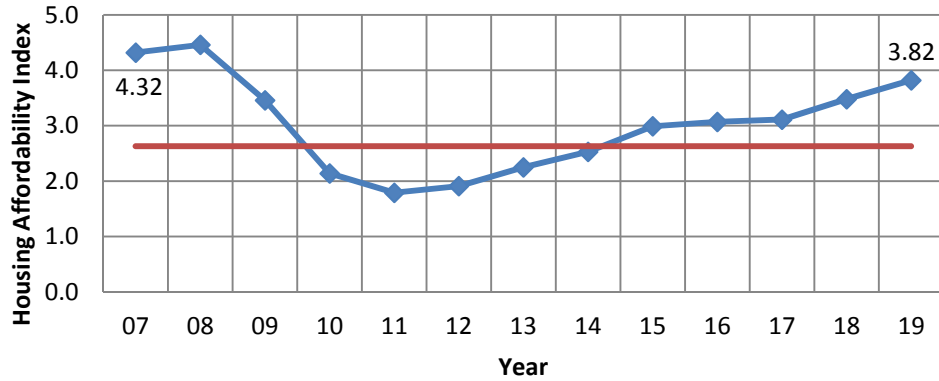


<b>45%</b>	<b>41.4%</b>	<b>33.4%</b>	<b>No</b>
Goal	2008	2018	Achieved?

According to the City Land Use Database there are 134,670 housing units in the City of Orlando at the end of 2018, of which 42,429 are single family units and 92,241 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 2017 ACS (American Community Survey) sources. This data is one year older than City data, therefore results are shown through the beginning of 2018 (reported as 2017 ACS). According to 2017 ACS data for the City of Orlando, there are a reported 128,403 housing units, of which 107,590 (83.8%) are occupied and 20,813 (16.2%) are vacant. Of the occupied units, 35,916 (33.4%) are owner-occupied and 71,674 (66.6%) are renter-occupied. The percentage of owner-occupied units has decreased by 2.1% since last year, and is below the 2008 reported rate of 41.4% 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			
<b>&lt;2.63</b>	<b>2.86</b>	<b>3.82</b>	<b>No</b>
Goal	Baseline	2019	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).<sup>2</sup> Information concerning median income was obtained from the U.S. Department of Housing & Urban Development.<sup>3</sup> According to a report from the Orlando Regional Realtor Association, the median sales price for homes in Metropolitan Orlando in 2018 was \$225,000. This figure is \$22,000 more than last year and \$23,000 less than the peak reported in January 2007. The median income for a family of four in Orange County increased from \$58,400 in 2017 to \$58,976 in 2018. This figure has increased by \$576 since last year and is a \$1,576 increase since 2007.

The City's housing affordability goal is a ratio of 2.63. The City's actual ratio for 2018 was 3.48 and as of January 1, 2019 it is 3.82. This figure is 0.34 more than last year, but is 0.50 below the 2007 baseline of 4.32. Housing prices are increasing, and affordability is a concern now and could be a greater concern in the near future.

<sup>2</sup> Orlando Regional Realtor Association, Metropolitan Orlando Housing Trends Summary, 2019 Statistics at a Glance, February 6, 2019, [https://cdn.ymaws.com/www.orlandorealtors.org/resource/resmgr/docs\\_market\\_pulse/housingtrends\\_summary022019.pdf](https://cdn.ymaws.com/www.orlandorealtors.org/resource/resmgr/docs_market_pulse/housingtrends_summary022019.pdf)

<sup>3</sup> U.S. Department of Housing and Urban Development, FY2018 Median Family Income Documentation System, Orlando-Kissimmee, FL MSA Results. <https://sites.google.com/site/floridamortgagelimits/hud-median-income-limits>

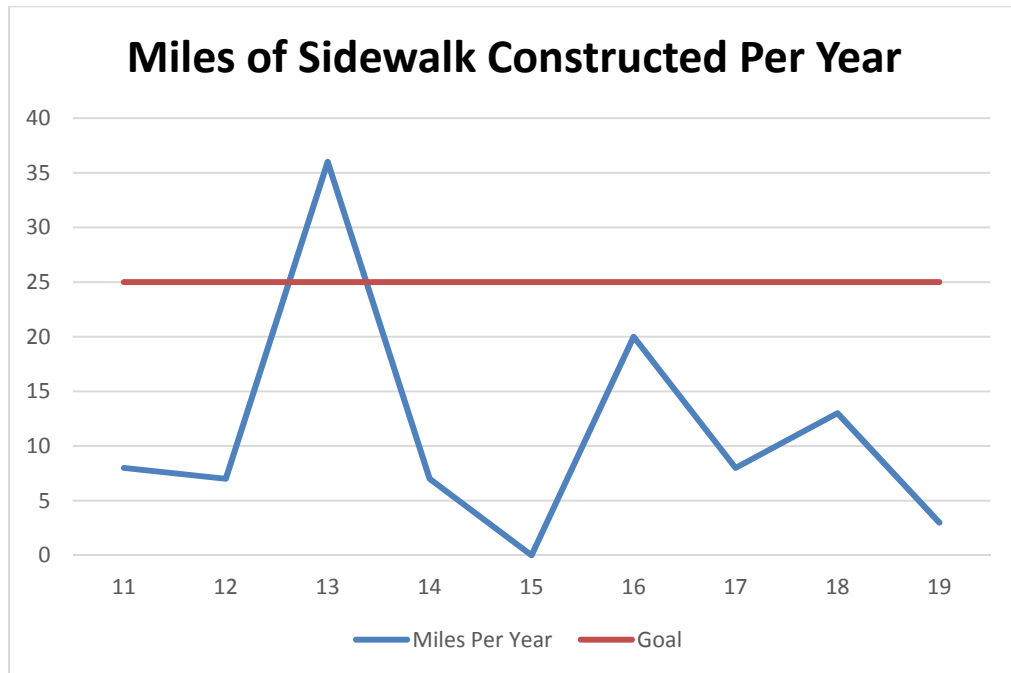


## D. TRANSPORTATION INDICATORS

### 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



<b>+25/yr</b>	<b>3</b>	<b>No</b>
Goal	2018	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
- 1,005 miles on August 1, 2018

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 3 new miles of sidewalks were constructed by Public Works during 2018. 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 363.5 miles of bikeways. This is an increase of 2 miles since last year, and an increase of 205.9 miles since 2003. In 2018, bikeways include:

Bike Paths:	42.49 miles
Bike Lanes:	267.68 miles
<u>Signed Routes:</u>	<u>53.37 miles</u>
<b>TOTAL:</b>	<b>363.54 miles</b>

## **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 Southern Expansion opened on July 30, 2018 which will link Sand Lake Road to Poinciana in Osceola County. The entire Southern Expansion is 17.2 miles features four additional stations (Meadow Woods, Tupperware Station, Kissimmee/Amtrak, Poinciana Station) to the existing rail system.

## **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 remained the same 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](http://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 55 out of 100 which is considered to be bikeable, there is some bike infrastructure. This score has risen 2 points since last year. The three neighborhoods with the highest Bike Scores in the City are Lake Eola Heights (90), Callahan (89) and Lake Dot (87). 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](http://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, 2018, the vehicles miles traveled in Orange County was 41,752,084. This is an increase from last year by 2,028,788 or 4.9%.

### **4. MODE CHOICE**

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

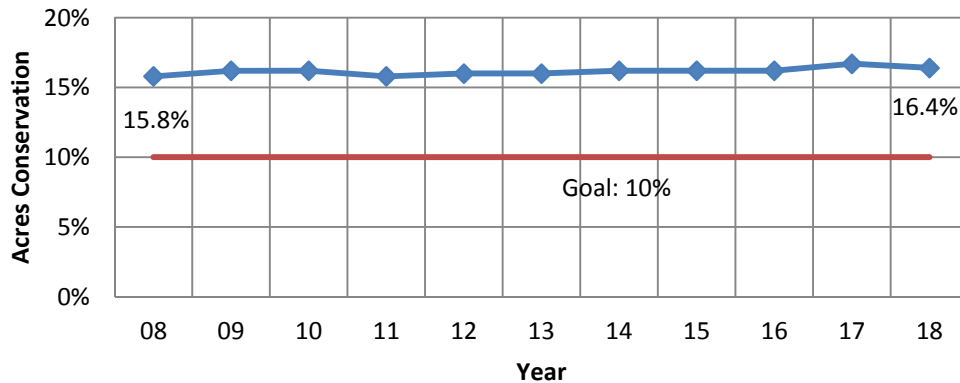
According to 2017 ACS data for the City of Orlando, of the 148,802 workers that travel to work, 76.0% drive a vehicle alone, 7.8% carpool, 4.3% use transit, 2.7% walk to work and 6.0% work from home. Those that chose to use transit decreased by 0.2% from the previous year.

## 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



<b>10%</b>	<b>10.8%</b>	<b>16.4%</b>	<b>Yes</b>
Goal	Baseline	2018	Achieved?

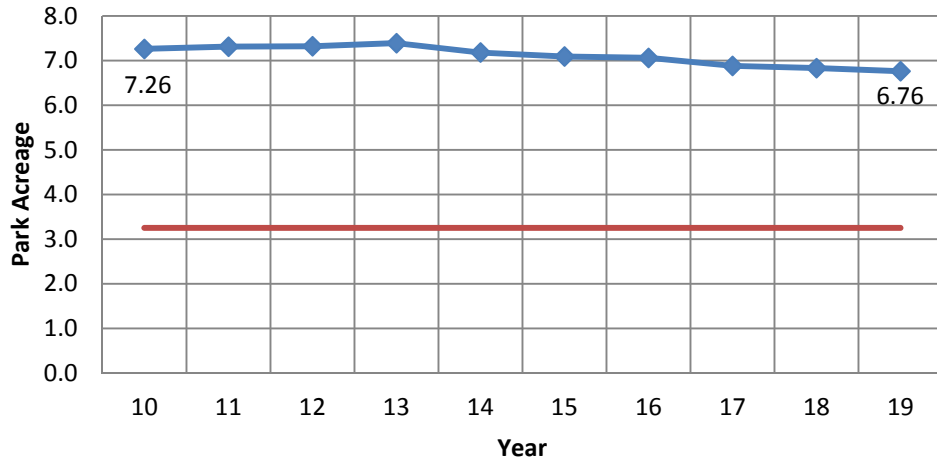
There is currently no accurate way to estimate all open space inside City limits. Open space may occur in any zoning district, may be publicly or privately owned, and may or may not be protected from future development. The next best option is to identify the amount of land that is designated as Conservation 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 39 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 14 acres since last year. This decrease is due to future land use changes which revised some Conservation areas for Southeast Orlando due to more accurate mapping. 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

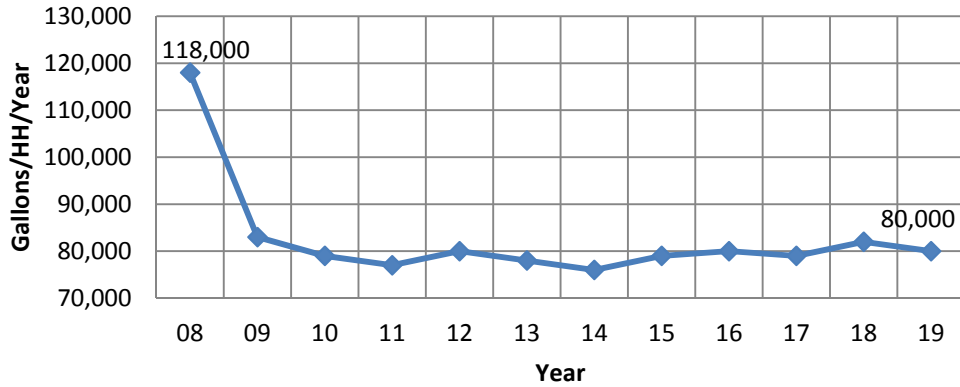


Parks level of service is measured as a ratio of acreage over resident population. The City has 1,929 acres of parks and added 203 acres since 2010. The resident population increased by 4,157 persons since last year and 57,320 persons since 2007. Based on these figures, the City's parks ratio is above the required LOS by 3.58 acres per thousand population. There is currently a surplus of 1,012 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 set to open at the end of March and in June and should help to improve next year's results.

### 3. WATER & ENERGY CONSUMPTION

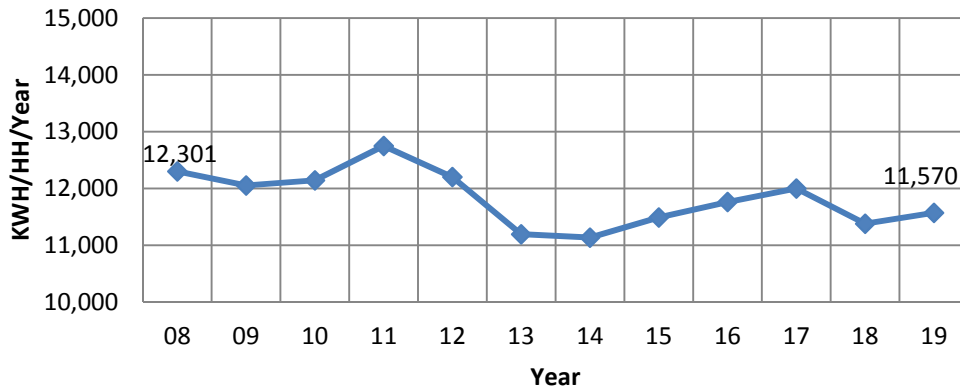
“The City shall reduce total per household potable water demand by an additional 3 percent between 2017 and 2020, and an additional 4 percent by 2040, from a baseline in 2017 of 79,000 gallons per household per year.” - GMP Potable Water Element Objective 1.2.

#### Annual Average Residential Water Consumption



↓	<b>79,000</b>	<b>80,000</b>	<b>No</b>
Goal	2017 Baseline	2019	Achieved?

#### Annual Average Residential Electric Consumption



↓	<b>12,301</b>	<b>11,570</b>	<b>No</b>
Goal	Baseline	2019	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 2018 Growth Indicators Report has been updated to reflect the corrected changes by OUC.

Current data indicates that per household water consumption decreased by 2,000 gallons or 2.5% when compared to last year and decreased by 32% when compared to the 2008 condition. Data also indicates that energy consumption has increased by 1.7% when compared to last year and decreased by 11.4% when compared to the baseline condition.

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 Plan includes 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 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 2019, 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 2018 included:

- 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.

In addition, the following specific activities will be addressed in 2019:

- Traditional City Activity Center and Mixed Use Corridor District LDC Amendments

- International Drive Special Plan Overlay Update
- Tree Preservation LDC Updates
- SODO Development Standards & Design Guidelines
- Land Development Code Amendments for Sidewalk Requirements

\* \* \*



**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	1/1/2019	Change from Previous Year	Community Development Goal	
A1	Population Total		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	285,210	4,157	376,110 projected by 2045	
	Single Family Units												40,964	41,444	41,977	42,429	452		
	Multifamily Units												87,564	90,141	91,835	92,241	406		
A2	Employment Total		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	264,980	4,139	Increase	
	New Growth																		
	Office sq. ft.												95,124	143,170	168,675	299,854	131,179		
	Retail sq. ft.												230,733	496,882	656,299	428,950	(227,349)		
	Hotel sq. ft.												507	1,291	423	1,217	794		
	Indust sq. ft.												1,461,909	641,035	272,541	557,834	285,293		
	Hospital sq. ft.												1,641,654	-	18,019	19,468	1,449		
	Civic sq. ft.												6,289	146,077	665,262	432,868	(232,394)		
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	285,210 / 75,900 / 3.76	4,157 / 39 / 0.05	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	264,980 / 75,900 / 3.49	4,139 / 39 / 0.05	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 / 0.96	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	264,980 / 285,210 / 0.93	4,139 / 4,157 / 1.00	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	279.95 / 118.5 / 2.36	0.59 / 0.5 / (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	2018			
		Residential	9%	13%	11%	11%	12%	11%	12%	14%	14%	13%	14%	13%	14%	14%	14%	0%	2045 Min. 15%
		Office	10%	8%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	0%	2045 Max. 30%
		Commercial	52%	54%	50%	50%	52%	52%	52%	50%	50%	51%	50%	50%	50%	51%	51%	1%	10% 25%
		Public, Recreational, Institutional	11%	9%	11%	10%	10%	12%	10%	11%	11%	11%	11%	11%	11%	11%	11%	0%	30% 50%
		Hospital	6%	6%	6%	8%	4%	4%	4%	4%	4%	5%	5%	5%	4%	4%	4%	0%	5% 20%
		Industrial	12%	10%	12%	11%	12%	12%	12%	11%	11%	10%	10%	11%	11%	10%	10%	0%	1% 10%
		TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	5% 10%
	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	2018			
		Residential												17%	16%	16%	0%	2045 Min. 10%	
		Office												33%	33%	33%	0%	2045 Max. 20%	
		Commercial												31%	32%	31%	-1%	10% 15%	
		Public, Recreational, Institutional												6%	6%	6%	0%	30% 55%	
		Hospital												2%	2%	2%	0%	5% 20%	
		Industrial												11%	11%	12%	0%	1% 8%	
		TOTAL												100%	100%	100%	1%	5% 15%	
B5	Transit Access	Population within 1/4 mile of Transit Corridor										116,883	117,614	95,030	88,411		(6,619)	Increase	
		Employment within 1/4 mile of Transit Corridor										154,053	155,403	94,664	78,227		(16,437)		
C1	Housing Mix	Percent multifamily (existing)									67.79%	67.97%	68.13%	68.50%	68.63%	68.49%		Monitor trends	
		Percent multifamily (annual growth)											1.9%	2.9%	1.9%	1.9%	0%		
C2	Housing Tenure	Owner-Occupied / Total Occupied =	39,977 / 96,947	41,166 / 99,612	41,626 / 100,568	42,210 / 102,204	42,272 / 98,146	38,569 / 96,753	38,479 / 97,918	37,425 / 102,564	36,986 / 103,466	37,733 / 109,685	37,094 / 111,100	38,542 / 108,523	35,916 / 107,590	Not yet available		Increase	
		% Owner-Occupied	41.2%	41.3%	41.4%	41.3%	43.1%	39.9%	39.3%	36.5%	35.7%	34.4%	33.4%	35.5%	33.4%		-2.1%		
		Renter-Occupied / Total Occupied =	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	71,674 / 107,590	Not yet available			
		% 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%	66.6%		-2.1%		
C3	Affordable	Median home sales price /	\$239,900	\$248,000	\$245,000	\$205,000	\$130,000	\$109,000	\$109,900	\$129,000	\$148,000	\$164,000	\$178,788	\$180,000	\$203,000	\$225,000	\$22,000	Maintain ratio less than	

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	1/1/2019	Change from Previous Year	Community Development Goal	
	Housing Ownership	Average household income for family of four	\$55,100 4.35	\$57,400 4.32	\$54,900 4.46	\$59,200 3.46	\$60,700 2.14	\$60,900 1.79	\$57,400 1.91	\$57,400 2.25	\$58,500 2.53	\$54,800 2.99	\$58,300 3.07	\$57,800 3.11	\$58,400 3.48	\$58,976 3.82	\$576 0.34	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	January 11, 2011 826	January 20, 2012 946	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	Aug. 1, 2018 (CAR) 1005		Add 4 miles per year. 3	
D1b	Miles of bike infrastructure								280.1	293.2	317.6	317.6	322.4	338.8	361.5	363.5		2 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	156.5		0 Increase	
D2a	Walkscore											39	39	41	42	42		1 Increase	
D2b	Bikescore											52	53	53	53	55		2 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	41,752,084	Not yet available	4.9%	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%	Drive Alone 76.0%, Carpool 7.8%, Transit 4.3%, Walk 2.7%, Other 3.2%, Work Home 6.0%	Not yet available	Drive Alone -3.1%, Carpool -0.4%, Transit 0.2%, Walk +0.9%, Other +1.3%, Work Home +1.5%	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%	12,427 75,900 16.4%	(14) 39 0.0%	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%	1,929 285,210 6.76%	10 4,157 -0.07%	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	80,000		-2,000 -2.5%	Decrease
		* 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*	as of September 30, 2018*			
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	11,570		192 1.7%	Decrease
		* 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*	as of September 30, 2018*			

Source: City of Orlando Economic Development Department, City Planning Division March 2019