



GROWTH MANAGEMENT PLAN

2020 - 2045
GROWTH PROJECTIONS REPORT
WITH ESTIMATES FOR APRIL 1, 2017 AND YEAR-END 2018

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City of Orlando 2020-2045 Growth Projections Report

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City of Orlando 2020-2045 Growth Projections Report

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I. Introduction

This report is intended to provide demographic, population and land use data for the City of Orlando, including historical data, past trends, comparisons to other cities and projections for the future. The historical data is derived from various sources, including the U.S. Census and the University of Florida’s Bureau of Economic and Business Research (BEBR). The report also contains residential and non-residential land use estimates (April 2017 and Year-End 2018) and growth projections by traffic zone for the period 2020-2045, including resident population, employment and “service” population, as well as the methodology and assumptions used to forecast this growth. These projections represent the City Planning Division’s current best estimate of when and where future growth will occur in the City for each land use category.

Underlying these projections is a future land use and transportation planning philosophy that promotes a compact, interconnected, mixed use environment, thereby creating opportunities for responsible growth and ensuring a high quality of life. Orlando’s future land use concept seeks to create compact activity centers with meaningful transportation alternatives, while preserving existing neighborhoods and creating sustainable new neighborhoods.

These projections, based on Orlando’s future land use concept (which is described in full detail in the Future Land Use Element), form the basis for the City of Orlando’s Growth Management Plan (GMP). The projections are used primarily for transportation modeling, particularly in support of regional transportation planning efforts. The projections are also used in level of service (capacity) analyses for transportation, parks, stormwater, solid waste, potable water, wastewater, fire and police, and schools. Related to these services, the projections are used in the City’s Concurrency Management System, and in budgeting and capital improvement programming. And finally, the City publishes these growth projections and other demographic information for use by individual citizens, citizen groups, consultants, and businesses.

By forecasting a specific quantity of new development and redevelopment in the future, the City can ensure through the GMP and the Capital Improvements Program that adequate public facilities will be in place when that development is built. Growth projections are important to ensure that the GMP continues to reflect current development trends and economic conditions.

II. Past Trends

Since its incorporation in 1875, Orlando has grown significantly in terms of land area, population, employment and influence in the Central Florida region. In 1875, Orlando comprised a 1 square mile area with a population of only a hundred or so. Orlando made its first official demographics appearance in the United States Census of 1890. At that time, Orlando had a population of 2,856 persons. For comparison, Jacksonville was the largest city in the state of Florida with a total population of 17,201, Tampa

had 5,532 persons, and the City of Miami did not yet exist. Orlando experienced a population loss in 1900 due to the great freeze of 1895, lowering the population to 2,481. However, from 1910 through 2010, the City of Orlando grew steadily (see Figure 1).

Figure 1—Orlando and Orange County Historical Population

Year	City of Orlando	% Growth	Orange County	% Growth	% of Orange County Population
1890	2,856	N/A	12,584	N/A	22.7%
1900	2,481	-13.13%	11,374	-9.62%	21.8%
1910	3,894	56.95%	19,107	67.99%	20.4%
1920	9,282	138.37%	19,890	4.10%	46.7%
1930	27,330	194.44%	49,737	150.06%	54.8%
1940	36,736	34.42%	70,074	40.89%	52.4%
1950	52,367	42.55%	114,950	64.04%	45.6%
1960	88,135	68.30%	263,540	129.26%	33.4%
1970	99,006	12.33%	344,311	30.65%	28.7%
1980	128,291	29.58%	470,865	36.76%	27.2%
1990	164,693	28.37%	677,491	43.88%	24.3%
2000	185,951	12.91%	896,344	32.30%	20.8%
2010	238,300	28.15%	1,145,956	27.85%	20.8%

Source: U.S. Census, Various Years

The pace of Orlando’s growth has fluctuated since 1890. The decades of phenomenal growth were those from 1910-1920 and 1920-1930, with population growth occurring at rates of 139% and 194%, respectively. After 1940, the City’s growth rate was impressive, but more moderate than during the boom years of the 1920’s and 1930’s. America’s space exploration program, in general, and the establishment of Martin Marietta’s Orlando plant in particular, spurred population growth in the 1950’s. Highly skilled engineers and technicians came to Orlando for high-paying jobs. The 1960’s represented a period of somewhat slower growth. While Orange County’s population grew 30.65% from 1960 to 1970, the City of Orlando only gained 10,871 new residents for an increase of 12.33% during that time period.

The 1968 announcement of plans to build Walt Disney World, and its opening in 1971 sparked very rapid growth in the Central Florida region in the early 1970’s. Then the 1975 recession, with its 11.1% unemployment rate, significantly slowed in-migration. As the economy recovered, in-migration picked up again. Growth during the 1980’s was steady, in part because of the prolonged economic stability experienced during that decade. During the early 1990’s, Orlando actually experienced a decline in population due to the closure of the Orlando Naval Training Center. However, this decline was a short-term anomaly, and since that time, population growth within the City of Orlando has steadily increased.

While population growth in Orlando has been steady, the growth of Orange County has been tremendous. From 1990 to 2010 (the last Census), Orange County as a whole grew by 468,465 (from 677,491 to 1,145,956), while the City grew by 73,607 people (from 164,693 to 238,300). In those 20 years, Orange County’s population grew by 69.14%, while Orlando’s population grew by 44.69%. In that period, by far the largest amount of population growth occurred in unincorporated Orange County as compared to the City of Orlando or the other municipalities in Orange County. Unincorporated Orange County grew by 304,352 new residents, representing 65% of Orange County’s total population growth from 1990 to 2010. Orange County’s 13 municipalities grew by 164,113 new residents, representing 35% of Orange County’s total population growth from 1990 to 2010.

The City of Orlando’s population growth of 73,607 represented 15.71% of Orange County’s total growth from 1990 to 2010. There was approximately 3 times more population growth in unincorporated Orange County than in the City of Orlando in those 20 years. Interestingly, the amount of population growth that occurred in unincorporated Orange County in that 20-year period (304,352) exceeded the City of Orlando’s total 2010 population of 238,300. It took Orlando 135 years (from 1875 to 2010) to grow to its 2010 population of 238,300. In comparison, unincorporated Orange County’s population grew an equivalent amount and then exceeded that amount by an additional 66,052 people in just two decades. Obviously, such rapid growth has significant impacts on the adequate provision of urban services such as roads, water, sewer, schools, and overall quality of life.

III. 2010 Census Summary for Orlando MSA, Orange County and Orlando

The 2010 Census provided a wealth of information about Orlando and Orange County. However, it should be noted that the 2010 Census did not contain detailed social and economic data. The Census Bureau did not collect long-form survey data as was done in previous Census efforts, and so data on poverty, income and educational attainment was not collected. Instead, such information will be published through the Census Bureau’s American Community Survey during intercensal years.

According to the 2010 U.S. Census:

- The average household size in unincorporated Orange County was 2.64, while the comparable household size in Orlando was 2.29. In terms of household composition, 35% of all households in unincorporated Orange County in 2010 (147,511) had children less than 18 years of age. Comparatively, 28.5% of Orlando’s households (29,200) had children less than 18 years of age in the year 2010. This trend has a significant impact on infrastructure and social services and particularly schools. The data infers a couple of things: first, Orlando tends to develop at higher densities, which is only logical for a center city; and second, the residential units being developed in unincorporated Orange County are probably larger and contain more families.
- Orlando’s populace is relatively young, with 53.9% below the age of 34. The median age is 32.8.
- Orlando is growing more diverse, with a population that is 57.6% White, 28.1% Black or African-American, 7.5% Asian, and 6.8% “other”. 25.4% of our residents describe themselves as Hispanic (please note that Hispanic is not a race, but an ethnicity). The percentage of Hispanics in Orlando has grown significantly, from 3% in 1980 to 9% in 1990, 17.5% in 2000, to 25.4% in 2010. Based on trend data, the City believes that this percentage may top 35% by 2020.
- Orlando has a relatively low percentage of home-ownership, with 39.5% owner-occupied units (a 1.3% decline from 2000) and 60.5% renter-occupied units. Unincorporated Orange County’s percentages are almost the exact opposite – 57.8% owner-occupied and 42.2% renter-occupied.
- The average household size of owner-occupied units in Orlando was 2.37 persons per unit, and for renter-occupied units that number was 2.24 persons per unit. This ratio was significantly less than in unincorporated Orange County, which had an average household size of 2.72 persons per owner-occupied unit and 2.53 persons per renter-occupied unit.

The following pages provide a summary of general demographic characteristics for both Orlando and Orange County (see Figure 2). This information, as well as much more detailed information down to the block group level, is available directly from the U.S. Census Bureau, via their website at www.census.gov.

Figure 2—Comparison of 2010 Census Data for Orlando Metro Area, Orange County, and City of Orlando
Profile of General Population and Housing Characteristics: 2010
2010 Demographic Profile Data, U.S. Census

Orlando Metropolitan Statistical Area (MSA)			Orange County			City of Orlando		
Subject	Number	Percent		Number	Percent		Number	Percent
SEX AND AGE								
Total population	2,134,411	100.0		1,145,956	100.0		238,300	100.0
Under 5 years	131,577	6.2		74,185	6.5		16,885	7.1
5 to 9 years	135,406	6.3		73,754	6.4		14,420	6.1
10 to 14 years	142,120	6.7		74,975	6.5		13,000	5.5
15 to 19 years	157,910	7.4		88,367	7.7		13,715	5.8
20 to 24 years	168,215	7.9		105,821	9.2		20,946	8.8
25 to 29 years	153,627	7.2		93,559	8.2		26,858	11.3
30 to 34 years	142,511	6.7		83,558	7.3		22,118	9.3
35 to 39 years	146,450	6.9		82,569	7.2		19,194	8.1
40 to 44 years	151,667	7.1		81,899	7.1		16,795	7.0
45 to 49 years	160,946	7.5		85,292	7.4		16,247	6.8
50 to 54 years	147,050	6.9		76,767	6.7		14,362	6.0
55 to 59 years	124,636	5.8		63,029	5.5		11,854	5.0
60 to 64 years	109,219	5.1		51,262	4.5		9,498	4.0
65 to 69 years	83,532	3.9		35,805	3.1		6,668	2.8
70 to 74 years	62,837	2.9		26,206	2.3		5,000	2.1
75 to 79 years	49,079	2.3		20,415	1.8		4,254	1.8
80 to 84 years	35,779	1.7		14,977	1.3		3,315	1.4
85 years and over	31,850	1.5		13,516	1.2		3,171	1.3
Median age (years)	36.3	(X)		33.7	(X)		32.8	(X)
16 years and over	1,695,452	79.4		907,410	79.2		191,302	80.3
18 years and over	1,634,926	76.6		875,809	76.4		186,003	78.1
21 years and over	1,531,140	71.7		811,735	70.8		176,928	74.2
62 years and over	327,137	15.3		140,443	12.3		27,845	11.7
65 years and over	263,077	12.3		110,919	9.7		22,408	9.4

Figure 2 (Continued)—Comparison of 2010 Census Data for Orlando Metro Area, Orange County, and City of Orlando
Profile of General Population and Housing Characteristics: 2010
 2010 Demographic Profile Data, U.S. Census

	Orlando Metropolitan Statistical Area (MSA)			Orange County		City of Orlando		
Male population	1,044,696	48.9		564,326	49.2		115,883	48.6
Under 5 years	67,290	3.2		38,130	3.3		8,809	3.7
5 to 9 years	68,781	3.2		37,440	3.3		7,352	3.1
10 to 14 years	72,679	3.4		38,221	3.3		6,625	2.8
15 to 19 years	80,625	3.8		44,855	3.9		6,817	2.9
20 to 24 years	85,406	4.0		53,541	4.7		9,848	4.1
25 to 29 years	77,053	3.6		47,142	4.1		12,947	5.4
30 to 34 years	70,539	3.3		41,733	3.6		11,187	4.7
35 to 39 years	71,523	3.4		40,853	3.6		9,671	4.1
40 to 44 years	74,885	3.5		40,995	3.6		8,677	3.6
45 to 49 years	79,400	3.7		42,407	3.7		8,208	3.4
50 to 54 years	71,119	3.3		37,430	3.3		6,924	2.9
55 to 59 years	58,761	2.8		29,938	2.6		5,591	2.3
60 to 64 years	51,145	2.4		24,203	2.1		4,363	1.8
65 to 69 years	38,833	1.8		16,561	1.4		2,934	1.2
70 to 74 years	28,984	1.4		11,777	1.0		2,105	0.9
75 to 79 years	21,954	1.0		8,798	0.8		1,714	0.7
80 to 84 years	14,798	0.7		5,834	0.5		1,144	0.5
85 years and over	10,921	0.5		4,468	0.4		967	0.4
Median age (years)	35.0	(X)		32.7	(X)		32.3	(X)
16 years and over	820,783	38.5		442,613	38.6		91,772	38.5
18 years and over	789,682	37.0		426,375	37.2		89,140	37.4
21 years and over	736,962	34.5		394,144	34.4		84,686	35.5
62 years and over	145,635	6.8		61,421	5.4		11,413	4.8
65 years and over	115,490	5.4		47,438	4.1		8,864	3.7

Figure 2 (Continued)—Comparison of 2010 Census Data for Orlando Metro Area, Orange County, and City of Orlando
Profile of General Population and Housing Characteristics: 2010
 2010 Demographic Profile Data, U.S. Census

	Orlando Metropolitan Statistical Area (MSA)			Orange County			City of Orlando		
Female population	1,089,715	51.1		581,630	50.8		122,417	51.4	
Under 5 years	64,287	3.0		36,055	3.1		8,076	3.4	
5 to 9 years	66,625	3.1		36,314	3.2		7,068	3.0	
10 to 14 years	69,441	3.3		36,754	3.2		6,375	2.7	
15 to 19 years	77,285	3.6		43,512	3.8		6,898	2.9	
20 to 24 years	82,809	3.9		52,280	4.6		11,098	4.7	
25 to 29 years	76,574	3.6		46,417	4.1		13,911	5.8	
30 to 34 years	71,972	3.4		41,825	3.6		10,931	4.6	
35 to 39 years	74,927	3.5		41,716	3.6		9,523	4.0	
40 to 44 years	76,782	3.6		40,904	3.6		8,118	3.4	
45 to 49 years	81,546	3.8		42,885	3.7		8,039	3.4	
50 to 54 years	75,931	3.6		39,337	3.4		7,438	3.1	
55 to 59 years	65,875	3.1		33,091	2.9		6,263	2.6	
60 to 64 years	58,074	2.7		27,059	2.4		5,135	2.2	
65 to 69 years	44,699	2.1		19,244	1.7		3,734	1.6	
70 to 74 years	33,853	1.6		14,429	1.3		2,895	1.2	
75 to 79 years	27,125	1.3		11,617	1.0		2,540	1.1	
80 to 84 years	20,981	1.0		9,143	0.8		2,171	0.9	
85 years and over	20,929	1.0		9,048	0.8		2,204	0.9	
Median age (years)	37.5	(X)		34.7	(X)		33.4	(X)	
16 years and over	874,669	41.0		464,797	40.6		99,530	41.8	
18 years and over	845,244	39.6		449,434	39.2		96,863	40.6	
21 years and over	794,178	37.2		417,591	36.4		92,242	38.7	
62 years and over	181,502	8.5		79,022	6.9		16,432	6.9	
65 years and over	147,587	6.9		63,481	5.5		13,544	5.7	

Figure 2 (Continued)—Comparison of 2010 Census Data for Orlando Metro Area, Orange County, and City of Orlando**Profile of General Population and Housing Characteristics: 2010**

2010 Demographic Profile Data, U.S. Census

	Orlando Metropolitan Statistical Area (MSA)			Orange County			City of Orlando	
RACE								
Total population	2,134,411	100.0		1,145,956	100.0		238,300	100.0
One Race	2,065,309	96.8		1,106,631	96.6		230,155	96.6
White	1,493,724	70.0		728,795	63.6		137,159	57.6
Black or African American	344,820	16.2		238,241	20.8		66,876	28.1
American Indian and Alaska Native	8,842	0.4		4,532	0.4		902	0.4
Asian	84,852	4.0		56,581	4.9		8,944	3.8
Asian Indian	26,105	1.2		15,524	1.4		2,245	0.9
Chinese	12,385	0.6		8,478	0.7		1,491	0.6
Filipino	14,411	0.7		9,348	0.8		1,595	0.7
Japanese	2,707	0.1		1,978	0.2		330	0.1
Korean	4,996	0.2		3,177	0.3		718	0.3
Vietnamese	13,053	0.6		10,709	0.9		1,567	0.7
Other Asian [1]	11,195	0.5		7,367	0.6		998	0.4
Native Hawaiian and Other Pacific Islander	2,033	0.1		1,266	0.1		183	0.1
Native Hawaiian	466	0.0		276	0.0		65	0.0
Guamanian or Chamorro	416	0.0		247	0.0		26	0.0
Samoan	214	0.0		155	0.0		20	0.0
Other Pacific Islander [2]	937	0.0		588	0.1		72	0.0
Some Other Race	131,038	6.1		77,216	6.7		16,091	6.8
Two or More Races	69,102	3.2		39,325	3.4		8,145	3.4
White; American Indian and Alaska Native [3]	6,002	0.3		2,648	0.2		500	0.2
White; Asian [3]	9,820	0.5		5,723	0.5		1,120	0.5
White; Black or African American [3]	15,678	0.7		8,584	0.7		1,947	0.8
White; Some Other Race [3]	16,136	0.8		9,317	0.8		1,939	0.8
Race alone or in combination with one or more other								
White	1,546,210	72.4		757,731	66.1		143,262	60.1
Black or African American	374,450	17.5		255,384	22.3		70,758	29.7
American Indian and Alaska Native	20,576	1.0		10,539	0.9		2,170	0.9
Asian	102,875	4.8		67,357	5.9		10,873	4.6
Native Hawaiian and Other Pacific Islander	6,368	0.3		4,018	0.4		715	0.3
Some Other Race	158,519	7.4		93,365	8.1		19,342	8.1

Figure 2 (Continued)—Comparison of 2010 Census Data for Orlando Metro Area, Orange County, and City of Orlando
Profile of General Population and Housing Characteristics: 2010
2010 Demographic Profile Data, U.S. Census

	Orlando Metropolitan Statistical Area (MSA)			Orange County			City of Orlando	
HISPANIC OR LATINO								
Total population	2,134,411	100.0		1,145,956	100.0		238,300	100.0
Hispanic or Latino (of any race)	538,856	25.2		308,244	26.9		60,483	25.4
Mexican	63,087	3.0		36,652	3.2		4,262	1.8
Puerto Rican	269,781	12.6		149,457	13.0		31,201	13.1
Cuban	36,724	1.7		22,528	2.0		4,299	1.8
Other Hispanic or Latino [5]	169,264	7.9		99,607	8.7		20,721	8.7
Not Hispanic or Latino	1,595,555	74.8		837,712	73.1		177,817	74.6
HISPANIC OR LATINO AND RACE								
Total population	2,134,411	100.0		1,145,956	100.0		238,300	100.0
Hispanic or Latino	538,856	25.2		308,244	26.9		60,483	25.4
White alone	356,861	16.7		202,041	17.6		38,626	16.2
Black or African American alone	25,125	1.2		15,041	1.3		3,292	1.4
American Indian and Alaska Native alone	3,837	0.2		2,083	0.2		419	0.2
Asian alone	1,685	0.1		1,040	0.1		188	0.1
Native Hawaiian and Other Pacific Islander alone	378	0.0		228	0.0		53	0.0
Some Other Race alone	121,113	5.7		70,938	6.2		14,403	6.0
Two or More Races	29,857	1.4		16,873	1.5		3,502	1.5
Not Hispanic or Latino	1,595,555	74.8		837,712	73.1		177,817	74.6
White alone	1,136,863	53.3		526,754	46.0		98,533	41.3
Black or African American alone	319,695	15.0		223,200	19.5		63,584	26.7
American Indian and Alaska Native alone	5,005	0.2		2,449	0.2		483	0.2
Asian alone	83,167	3.9		55,541	4.8		8,756	3.7
Native Hawaiian and Other Pacific Islander alone	1,655	0.1		1,038	0.1		130	0.1
Some Other Race alone	9,925	0.5		6,278	0.5		1,688	0.7
Two or More Races	39,245	1.8		22,452	2.0		4,643	1.9

Figure 2 (Continued)—Comparison of 2010 Census Data for Orlando Metro Area, Orange County, and City of Orlando
Profile of General Population and Housing Characteristics: 2010
2010 Demographic Profile Data, U.S. Census

	Orlando Metropolitan Statistical Area (MSA)			Orange County			City of Orlando	
RELATIONSHIP								
Total population	2,134,411	100.0		1,145,956	100.0		238,300	100.0
In households	2,089,943	97.9		1,112,252	97.1		235,006	98.6
Householder	798,445	37.4		421,847	36.8		102,521	43.0
Spouse [6]	377,055	17.7		183,486	16.0		31,071	13.0
Child	604,593	28.3		325,164	28.4		60,411	25.4
Own child under 18 years	432,829	20.3		233,078	20.3		44,847	18.8
Other relatives	156,314	7.3		89,315	7.8		17,623	7.4
Under 18 years	56,079	2.6		31,573	2.8		6,201	2.6
65 years and over	26,422	1.2		13,870	1.2		2,141	0.9
Nonrelatives	153,536	7.2		92,440	8.1		23,380	9.8
Under 18 years	8,861	0.4		4,505	0.4		889	0.4
65 years and over	6,528	0.3		2,824	0.2		572	0.2
Unmarried partner	62,907	2.9		35,234	3.1		10,138	4.3
In group quarters	44,468	2.1		33,704	2.9		3,294	1.4
Institutionalized population	18,879	0.9		10,214	0.9		1,227	0.5
Male	12,621	0.6		7,237	0.6		581	0.2
Female	6,258	0.3		2,977	0.3		646	0.3
Noninstitutionalized population	25,589	1.2		23,490	2.0		2,067	0.9
Male	12,006	0.6		10,697	0.9		1,370	0.6
Female	13,583	0.6		12,793	1.1		697	0.3

Figure 2 (Continued)—Comparison of 2010 Census Data for Orlando Metro Area, Orange County, and City of Orlando
Profile of General Population and Housing Characteristics: 2010
2010 Demographic Profile Data, U.S. Census

	Orlando Metropolitan Statistical Area (MSA)			Orange County		City of Orlando		
HOUSEHOLDS BY TYPE								
Total households	798,445	100.0		421,847	100.0		102,521	100.0
Family households (families) [7]	536,219	67.2		273,454	64.8		53,854	52.5
With own children under 18 years	241,611	30.3		129,955	30.8		25,695	25.1
Husband-wife family	377,055	47.2		183,486	43.5		31,071	30.3
With own children under 18 years	156,654	19.6		82,110	19.5		12,986	12.7
Male householder, no wife present	42,955	5.4		23,948	5.7		5,472	5.3
With own children under 18 years	20,465	2.6		11,005	2.6		2,475	2.4
Female householder, no husband present	116,209	14.6		66,020	15.7		17,311	16.9
With own children under 18 years	64,492	8.1		36,840	8.7		10,234	10.0
Nonfamily households [7]	262,226	32.8		148,393	35.2		48,667	47.5
Householder living alone	192,336	24.1		104,832	24.9		35,433	34.6
Male	87,413	10.9		50,043	11.9		16,756	16.3
65 years and over	17,158	2.1		7,197	1.7		1,901	1.9
Female	104,923	13.1		54,789	13.0		18,677	18.2
65 years and over	42,492	5.3		18,419	4.4		5,393	5.3
Households with individuals under 18 years	273,499	34.3		147,511	35.0		29,222	28.5
Households with individuals 65 years and over	189,096	23.7		81,886	19.4		17,197	16.8
Average household size	2.62	(X)		2.64	(X)		2.29	(X)
Average family size [7]	3.12	(X)		3.19	(X)		3.03	(X)
HOUSING OCCUPANCY								
Total housing units	942,312	100.0		487,839	100.0		121,254	100.0
Occupied housing units	798,445	84.7		421,847	86.5		102,521	84.6
Vacant housing units	143,867	15.3		65,992	13.5		18,733	15.4
For rent	45,203	4.8		26,787	5.5		10,177	8.4
Rented, not occupied	1,489	0.2		695	0.1		245	0.2
For sale only	21,757	2.3		10,683	2.2		2,753	2.3
Sold, not occupied	3,008	0.3		1,401	0.3		373	0.3
For seasonal, recreational, or occasional use	45,493	4.8		13,633	2.8		1,942	1.6
All other vacants	26,917	2.9		12,793	2.6		3,243	2.7
Homeowner vacancy rate (percent) [8]	4.1	(X)		4.2	(X)		6.3	(X)
Rental vacancy rate (percent) [9]	13.3	(X)		13.0	(X)		14.0	(X)

Figure 2 (Continued)—Comparison of 2010 Census Data for Orlando Metro Area, Orange County, and City of Orlando
Profile of General Population and Housing Characteristics: 2010
2010 Demographic Profile Data, U.S. Census

	Orlando Metropolitan Statistical Area (MSA)			Orange County			City of Orlando		
HOUSING TENURE									
Occupied housing units	798,445	100.0		421,847	100.0		102,521	100.0	
Owner-occupied housing units	504,792	63.2		243,950	57.8		40,458	39.5	
Population in owner-occupied housing units	1,336,898	(X)		662,686	(X)		95,835	(X)	
Average household size of owner-occupied units	2.65	(X)		2.72	(X)		2.37	(X)	
Renter-occupied housing units	293,653	36.8		177,897	42.2		62,063	60.5	
Population in renter-occupied housing units	753,045	(X)		449,566	(X)		139,171	(X)	
Average household size of renter-occupied units	2.56	(X)		2.53	(X)		2.24	(X)	

NOTES:

X Not applicable.

[1] Other Asian alone, or two or more Asian categories.

[2] Other Pacific Islander alone, or two or more Native Hawaiian and Other Pacific Islander categories.

[3] One of the four most commonly reported multiple-race combinations nationwide in Census 2000.

[4] In combination with one or more of the other races listed. The six numbers may add to more than the total population, and the six percentages may add to more than 100 percent because individuals may report more than one race.

[5] This category is composed of people whose origins are from the Dominican Republic, Spain, and Spanish-speaking Central or South American countries. It also includes general origin responses such as "Latino" or "Hispanic."

[6] "Spouse" represents spouse of the householder. It does not reflect all spouses in a household. Responses of "same-sex spouse" were edited during processing to "unmarried partner."

[7] "Family households" consist of a householder and one or more other people related to the householder by birth, marriage, or adoption. They do not include same-sex married couples even if the marriage was performed in a state issuing marriage certificates for same-sex couples. Same-sex couple households are included in the family households category if there is at least one additional person related to the householder by birth or adoption. Same-sex couple households with no relatives of the householder present are tabulated in nonfamily households. "Nonfamily households" consist of people living alone and households which do not have any members related to the householder.

[8] The homeowner vacancy rate is the proportion of the homeowner inventory that is vacant "for sale." It is computed by dividing the total number of vacant units "for sale only" by the sum of owner-occupied units, vacant units that are "for sale only," and vacant units that have been sold but not yet occupied; and then multiplying by 100.

[9] The rental vacancy rate is the proportion of the rental inventory that is vacant "for rent." It is computed by dividing the total number of vacant units "for rent" by the sum of the renter-occupied units, vacant units that are "for rent," and vacant units that have been rented but not yet occupied; and then multiplying by 100.

Source: U.S. Census Bureau, 2010 Census.

IV. Historic Land Area Growth

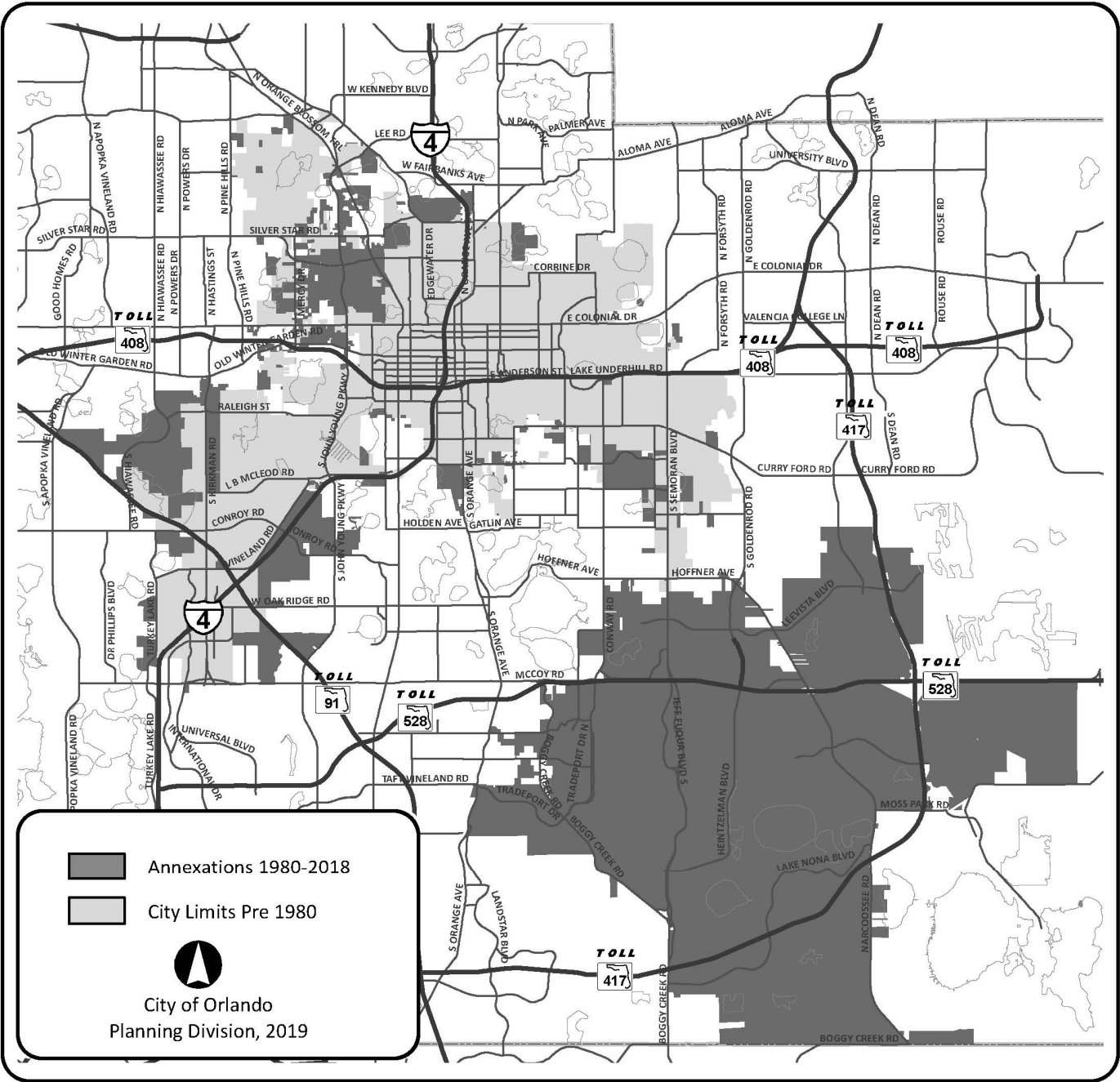
Since 1980, the City has experienced a great deal of growth in it’s land area, as the result of numerous annexations. Figure 3a below shows the City’s growth in acres, square miles and resident population per square mile. Figure 3b is a map showing the areas where recent annexation activity has taken place. According to these figures, Orlando’s land area increased by 45,421 acres (70.97 square miles) from 1980 to 2015. Much of this acreage consists of the Orlando International Airport property, as well as properties within the Southeast Orlando Sector Plan and Vista East areas in southeast Orlando.

In April 2016, Orlando annexed the 2,559 Starwood property which added approximately 4 square miles to the City’s land area (the last major annexation). As a result, the population per square mile figure dipped slightly but for only about a year or so. Because the Starwood development is primarily a residential project and significant population growth is occurring in this and other areas of southeast Orlando, the population per square mile figure has already rebounded and is expected to increase for the foreseeable future.

Figure 3a—City Dimensions and Population Per Square Mile

Year	Acres	Square Miles	Population	Population Per Square Mile
1980	27,624	43.16	128,291	2,972
1985	40,454	63.21	146,491	2,318
1990	46,196	72.18	164,693	2,282
1995	60,304	94.23	170,307	1,807
2000	65,888	102.95	185,951	1,806
2005	70,280	109.81	217,567	1,981
2010	71,422	111.60	238,300	2,135
2015	73,045	114.13	262,372	2,299
2018	75,900	118.59	284,464	2,399

Figure 3b.—Annexation Activity from 1980 through 2018.



V. Development of City-Wide Projections

This document contains the Economic Development Department’s current best assessment of when and where future growth will occur in the City of Orlando. Specific tasks related to the development of these updated projections included the creation of City-wide population and employment control numbers, an inventory and verification of existing land use information, organization and mapping of vacant developable land information for residential, non-residential and mixed use zoning districts, and allocation of projected growth to specific traffic zones. Each of these tasks is described below.

City Wide Resident Population Projections

The first step in our methodology was to establish Orange County and City-wide resident population estimates and projections for use as a check against detailed small area (traffic analysis zone) estimates and projections. Historical population estimates for Orange County and Orlando were taken from official U.S. Census (1970, 1980, 1990, 2000, 2010). Non-Census estimates for Orange County for the years 1985 through 2018 were derived from official University of Florida—Bureau of Economic and Business Research (BEBR) estimates. Projected population growth for Orange County from 2020 through 2045 was derived from the most recent medium projections for Orange County, published in BEBR’s “Projections of Florida Population by County—2020-2045, with Estimates for 2018”, Florida Population Studies, Volume 52, Bulletin 183, April 2019. The City believes that these figures represent best available data. Since BEBR does not provide City-level projections, staff determined future City population by using a share of growth analysis.

The share of growth analysis involved calculating the City’s proportionate share of Orange County’s population for the years 1970-2018, then averaging the differences between these percentages. As indicated in Figure 4, Orlando’s share of Orange County population has decreased by an average of 0.15979 percentage points per annum between 1970 and 2018 ($28.75 - 21.13 = 7.67/48 = 0.15979$). Using a straight-line trend analysis, Orlando’s share of Orange County population would potentially fall to 16.776%, a 4.31 percentage point decrease between 2018 and 2045. In fact, using a simple straight-line method would result in Orlando’s population being “capped” at about 332,200 in 2040, and then decreasing to 331,258 between 2040 and 2045. Based on history, this is unlikely.

While Orlando’s overall share of Orange County population will decrease during the forecast period, it will not decrease at historic rates. Please note that Orlando’s share of Orange County population actually grew from 20.75% in 2000 to 21.08% in 2018. The straight-line trend simply does not take into account significant growth within large greenfield sites such as the Southeast Orlando Sector Plan area including Lake Nona/Medical City, newly annexed large-scale projects such as Storey Park and Starwood; nor does it adequately reflect intensive transit-oriented development and redevelopment in the Downtown urban core and other urban villages. Taking all of these factors into consideration, the City is assuming that a smaller 0.73 percentage point decrease between 2018 and 2045 in the City share of Orange County population will occur—approximately 3.58 percentage points less than the 1970 to 2018 straight-line trend.

Orlando’s adjusted share of Orange County population for each five year period through 2045 served as the City-wide control number used to verify staff’s projections. As discussed in Section VII, upon completion of residential unit allocations by traffic zone, projected growth in single-family and multifamily units was converted to population growth in each traffic zone. This population was then aggregated to produce the City’s total projected resident population through 2045, and compared to “Orlando’s Adjusted Share” in Figure 4. Comparison of the projected population to Orlando’s share of BEBR-projected Orange County growth (control numbers) indicated that the staff allocations by traffic zone were within a reasonable range of the control numbers, and were thus acceptable for use as the City’s updated residential growth projections.

Figure 4—Validation of Orlando’s Population Projections—2020-2045 Population Control Numbers

Year	Orange County Population	Orlando's Share	Orlando's Ratio	Orlando's Adjusted Share "Control"	Adjusted Ratio
1970	344,311	99,006	28.75%	-	-
1980	470,865	128,291	27.25%	-	-
1985	556,445	146,491	26.33%	-	-
1990	677,491	164,693	24.31%	-	-
1995	765,906	170,307	22.24%	-	-
2000	896,344	185,951	20.75%	-	-
2005	1,050,333	217,567	20.71%	-	-
2010	1,145,956	238,300	20.79%	-	-
2015	1,252,396	262,372	20.95%	-	-
2018	1,349,597	284,464	21.08%		
2020	1,415,500	293,858	20.76%	300,000	21.19%
2025	1,568,100	312,993	19.96%	338,000	21.55%
2030	1,694,000	324,570	19.16%	369,000	21.78%
2035	1,799,300	330,351	18.36%	386,000	21.45%
2040	1,891,800	332,200	17.56%	394,000	20.83%
2045	1,975,300	331,258	16.77%	402,000	20.35%

City Wide Employment Projections

As with the residential projections, City-wide control numbers for employment were developed as a check against the updated traffic-zone specific City-wide non-residential growth forecasts (see Figure 5). Total Orange County Employment includes all job categories, including farm, agricultural services and mining. The 1970 through 2018 employment estimates for Orange County, as well as the 2020 to 2045 projections for Orange County, were derived from Woods and Poole—2019 Florida State Profile. The 1970-1990 employment estimates for the City of Orlando were derived from Orlando’s 1991 GMP (as amended). Orlando’s employment estimates for 2000 through 2018 were derived from Orlando’s City Land Use Database.

In developing employment control numbers for this update, the City again utilized the share of growth methodology. Orlando’s share of total Orange County employment increased slightly from 1970 to 1980, due primarily to the annexation of the Orlando International Airport. There was an overall decline in the City’s share of Orange County employment between 1970 and 2017 of 9.99 percentage points (47 years; 0.21 percentage points per year). Orlando’s share actually grew from 2000 to 2010 (by 2.05 percentage points). However, it is anticipated that Orlando’s share will gradually decrease between 2018 and 2045.

Orlando’s employment population is anticipated to grow by approximately 92,000 between 2018 and 2045 primarily due to development within the Southeast Orlando Sector Plan area, which includes the Medical City area in and around Lake Nona. This area is anticipated to generate a significant number of new employees associated with the University of Central Florida’s Health Sciences Campus, Sanford-Burnham-Prebys Biomedical Sciences Complex, Nemours Children’s Hospital, the University of Florida’s Academic & Research Center, and the 1.2-million square foot Veteran’s Administration (V.A.) Medical Center, along with associated biomedical and health-sciences related facilities.

Additional high intensity infill/redevelopment is also anticipated in the Downtown, the Advent Health and Orlando Health campuses north and south of Downtown, and new tourism-oriented service employment growth in the Universal/International Drive/attractions area. Finally, the Orlando International Airport is expected to more than double in terms of employees with the development of the Southern Terminal which is currently under construction.

**Figure 5—Validation of Orlando’s Employment Projections—
2020-2045 Employment Control Numbers**

Year	Orange County Total Employment	Orlando's Share of Orange County Total Employment	Orlando's Ratio as Percentage of Orange County Total Employment
1970	171,594	60,584	35.31%
1980	291,165	107,563	36.94%
1990	516,944	154,950	29.97%
2000	735,810	196,778	26.74%
2010	822,557	235,430	28.62%
2015	997,734	248,471	24.90%
2017	1,029,910	260,727	25.32%
2018	1,095,678	264,980	24.18%
2020	1,142,800	279,300	24.44%
2025	1,265,276	310,000	24.50%
2030	1,394,028	331,300	23.77%
2035	1,524,145	345,000	22.64%
2040	1,655,187	353,000	21.33%
2045	1,791,914	357,000	19.92%

City Wide Service Population (Day-Time Population) Projections

Although the University of Florida’s BEBR prepares current resident population estimates for the City of Orlando, they do not prepare estimates for what the City refers to as “service population”, which includes all those people that may have an impact on City services during any given day. This “service population” (or daytime population), while somewhat difficult to estimate, is much larger than Orlando’s resident population and includes tourists, the homeless, and employees (over and above resident employees) that travel to and work in the City during any given day. Service population has an impact on all infrastructure services, particularly Fire and Police.

The first component is resident population, which has already been discussed. The second component is the homeless population. According to the Homeless Services Network, there are an estimated 10,000 homeless people living in the Orlando Metropolitan Statistical Area (Orange, Seminole, Osceola & Lake counties)—and that count may jump to 20,000 if the number of children in temporary shelters such as hotels/motels is factored in. Several national surveys and studies recommend using 1% of the resident population in urbanized areas to determine the number of homeless people. Because many health and social services for the homeless are located in Downtown Orlando, it can be surmised that a large portion of this homeless population is concentrated in the Downtown. For purposes of this analysis, an assumed percentage of 3% was applied to resident population estimates and projections in the Downtown area, and 1% for the remainder of the City to derive the number of homeless persons through 2045. Based on 2000 and 2010 Census information and the City’s Land Use Database, it was concluded that migratory farm workers were not a factor in the City of Orlando’s service population estimates and projections.

The third major component in determining service population is the large number of tourists and business people staying in hotels throughout the City, particularly in the Downtown, around the Orlando International Airport, and the International Drive/Universal Studios/attractions area in the southwest part of the City. For hotels, the City assumed an occupancy rate of 65% for the April 1, 2017 estimate and projection years through 2045. The persons per hotel room variable was determined by splitting visitor arrivals into two categories; those that arrive by automobile, and those that arrive by air. Using Florida Department of Commerce visitor arrival estimates, it was calculated that there was an approximate 2 persons per hotel unit in Orlando.

The final component in determining Orlando’s service population is an estimate of additional attendant employment (over and above resident employment). Based on commuting patterns, there are more workers commuting into the City of Orlando than leaving the City during any given day. Staff has estimated that 75% of Orlando residents work in Orlando, except for the Downtown area, where there are many more people traveling from outside the City to their workplaces. Therefore, additional attendant employment was based on 75% of the employment population for the Downtown area, and 25% of the employment population for the remaining areas.

Figure 6 summarizes the City’s service population projections for the period 2017-2045. More detailed estimates and projections by traffic zone are presented in Appendix J.

Figure 6—2017 to 2045 City-Wide Service Population

Year	Resident Population (TZ Bottom-Up)	Homeless Population	Tourist Population	% Outside Employment	Service Population
2017	280,687	3,495	32,020	92,659	408,861
2018	285,210	3,546	33,372	93,770	415,898
2020	299,995	3,779	37,081	97,609	438,464
2025	337,506	4,283	45,549	106,721	494,059
2030	368,304	4,692	49,306	112,530	534,832
2035	385,636	4,895	51,516	116,418	558,465
2040	393,624	4,984	51,711	118,343	568,662
2045	400,854	5,092	51,906	119,565	577,417

VI. Methodology and Assumptions Used in Allocating Growth by Traffic Zone

The following is a summary of the methodology and general assumptions used in allocating projected residential and non-residential growth from the City-wide perspective down to specific traffic zones. In general, the City used a “top-down, bottom-up” approach, using the control numbers previously mentioned as the “top-down” component, and occupancy > structure > parcel > traffic zone assumptions to create the bottom-up projections. The City’s traffic zone “bottom-up” projections must fall below the City-wide “top-down” control numbers in order to be considered valid. The underlying base data estimates were also cross-checked against historical U.S. Census data to ensure accuracy. This particular validation process required multiple iterations in order to create a realistic, market-based set of growth projections. As can be expected, this was a very labor-intensive process.

Annexations—In order to ensure that Orlando remains the strong central city of the region, its boundaries must logically expand. Orlando and its surrounding suburban communities have parallel destinies—they will either grow or decline together as a single economy. Orlando views annexation, particularly in those areas where the City can provide the most efficient services, as being important in terms of maintaining a healthy jobs-housing balance.

It should be noted that, because predicting annexations is difficult at best, the methodology and assumptions discussed below do not anticipate annexations beyond the “Projected 2018” time period. Obviously, future annexations will affect the City’s ultimate growth patterns. Because of the unpredictability of annexation activity, the Economic Development Department anticipates the need to update these projections on a fairly frequent basis (at minimum, every two to three years).

Existing Land Use—Utilization of CLUDB to Derive 2017 Base Data

The 2017-2045 residential and non-residential growth projections by traffic zone are an outgrowth of the City Land Use Database (CLUDB). CLUDB contains detailed land use information by parcel (land), structure and occupancy (LSO) for the entire City of Orlando. CLUDB is a sophisticated, near real-time land use database that is an invaluable resource for many of the City of Orlando’s planning and development projects.

The initial data collection phase of the CLUDB project was conducted between September 1991 and December 1991. Two sources of information were utilized at that time. The first was the City’s Fire Inspection database, which contained information on commercial properties and multi-family residential complexes. The second source was the Stormwater Utility database, which had reliable residential information. These two databases were merged to form CLUDB. The data was then confirmed through field verification. After this initial work effort, data-entry and clean-up of the database proceeded through June of 1992. Since that time, CLUDB has been updated weekly via down-loads of GIS-parcel information from the Orange County Property Appraiser (new parcels and annexed parcels), Demolition Permit data, Certificates of Occupancy, Business Tax Receipts, field verification, and other means.

CLUDB was used to derive the April 2017 Base Data that served as the starting point for preparing these residential and non-residential growth forecasts. For residential uses, the number of existing housing units (single-family and multifamily) was aggregated by traffic zone. For non-residential uses, the amount of existing square feet, or rooms in the case of hotels, was again aggregated by traffic zone. The CLUDB base data, as presented in this document, was current as of April 1, 2017. The year-end 2018 data is also an “estimate” as opposed to a “projection” as it is based on CLUDB land use data.

Developments of Regional Impact/Planned Developments

The City of Orlando has approximately twenty approved and former Developments of Regional Impact (DRIs) within its corporate boundaries. Some of these DRIs have since been converted to Planned Developments consistent with recent changes to Florida Statutes. These planned developments have a tremendous impact on the City’s growth projections, and in reality account for much of the anticipated development that will occur in the City during the next 30 years. The development associated with these projects has been incorporated into the City’s growth projections, consistent with the development programs shown in each DRI and/or PD Development Order. However, some adjustments were made by staff to make the projections more realistic. Some future development associated with DRIs in the City has been “spread-out” over the 30-year horizon, based on market conditions and likely absorption by subarea.

Development of City-Wide Vacant Land Information for Residential, Non-Residential, and Mixed-Use Zoned Land by Traffic Zone

Probable locations for future development within the City, and the likely quantity of such development, were identified by preparing vacant land charts and maps based on information obtained from the City Land Use Database (CLUDB), the City’s Geographic Information System (GIS), and Orange County Property Appraiser data. This analysis was completed for residential, non-residential and mixed-use zoning categories according to the City’s adopted planning subareas—Northwest, Northeast, Southwest, Southeast, and Downtown. The vacant land charts aggregated vacant land acreage information by zoning district and traffic zone. The vacant land maps showed the geographic location of each vacant parcel, again by zoning district and traffic zone.

Project team members used this information to make specific projections concerning the amount of development likely to occur on each vacant parcel. Projections were based on the zoning of the particular parcel, total acreage, the maximum density/intensity of development allowed, and a realistic intensity/density assumption based on surrounding market conditions. For instance, while the zoning of an industrial parcel may permit a 0.7 floor area ratio (FAR), a lower FAR may have been applied if the development pattern in the area had normally supported much less intense development in the past. The location of a vacant parcel relative to other planned and existing projects, as well as the presence of known environmental constraints were also considered in projecting the site’s development potential. Such factors were carefully considered in formulating realistic forecasts for development of the City’s remaining vacant land.

Redevelopment Analysis

In addition to vacant land, redevelopment potential was also analyzed. The redevelopment analysis focused on properties within the City’s Activity Centers, Mixed Use Corridors, and additional areas in close proximity to Advent Health Village and the Orlando Health (ORHS) Campus. Additional consideration was given to recognized redevelopment areas including Parramore and the South Downtown Redevelopment Plan area.

The methodology for analyzing redevelopment potential involved running a GIS/Orange County Property Appraiser data query on all parcels within the City’s Activity Centers, Mixed Use Corridors, and the other areas mentioned above. Once that query was completed, all parcels equal to or less than 0.10 acres in size were removed. That data was further sifted by selecting all parcels with a structure value to total assessed value ratio of 0.25 and below (less than 0.25), and then removing all parcels with non-residential or non-commercial DOR Use Codes (including Utilities, Government/State, Recreation Building/Recreation Tracts, Parking/Service Garage, Municipal, Lease Interest, County, Communication Tower, Charitable, Religious, and Lodge/Union Hall). Then, we removed those parcels where the structure was built after the year 2000. This sifting process produced approximately 500 to 600 potential redevelopment sites.

A site-specific, contextual analysis of each those parcels was then conducted using Orlando MapWorks SL (the City’s mapping system). That analysis involved a comparison of known projects to ensure there was no potential over-projection issues, an examination of adjacent property ownership to determine if aggregation of properties had occurred (a sure sign of redevelopment potential), and then a comparison of existing floor area ratios (FARs) and residential densities to the intensities and densities allowed under the parcel’s future land use designations and zoning classifications. Using this information, it was possible to differentiate and map those parcels considered highly likely, moderately likely, and less likely to redevelop, and then to make assumptions relating to timing of such potential redevelopment. This parcel-level redevelopment analysis was utilized in the creation of the City’s traffic zone level projections of growth.

Market Trend Analysis (Making it Realistic)

The allocations of growth by traffic zone presented in this document represent the Comprehensive Planning Studio’s best assessment of future growth patterns for each of eight land use categories. Although the allocations are not “market projections” in the strictest sense, they do address market trends as reflected by projects currently under construction, those with approved development plans those undergoing development review (current plans and projects), and potential redevelopment as described above. Staff analysis of such market trends included examination of permitted development projects (all sizes), recorded master plans and subdivisions, proposed and approved DRI’s and PDs, and city-wide vacant land data.

Projections for current and former DRIs have not been allocated as specifically approved in their development orders. Rather, DRI projections reflect a more realistic allocation based on staff analysis of the

development trends associated with each project. Finally, the expertise and knowledge of staff from other Departments was called upon to determine likely development scenarios. This comprehensive review of the known development environment ensured that the growth projections were developed with deliberate consideration of realistic market trends.

Population & Employment Multipliers

Multipliers were developed to convert residential (dwelling unit) and non-residential (square footage, rooms) projections into population and employment forecasts. This conversion was necessary in order to compare the “bottom-up” traffic zone-level land use projections against the “top-down” City-wide control numbers mentioned previously.

Population Projections—For residential uses, the total number of single-family and multifamily housing units in each traffic zone (existing and projected) were multiplied by standard occupancy rates (0.9694 for single-family; 0.975 for multifamily) and by variable persons per unit multipliers to determine a population for each traffic zone. The traffic zone estimates and projections were then aggregated to produce a total projected population for the City. The occupancy rates were derived from 2010 U.S. Census estimates, and are essentially an average for the entire City of Orlando.

The persons per unit multipliers were derived from the 2010 U.S. Census and more recent American Community Survey (ACS) data produced by the US. Census Bureau. However, rather than using a City-wide average, the City’s method involved determining the persons per unit figure for each Census Tract (ranging from 1.15 to 3.29 persons per unit), and assigning that persons per unit number to the closest approximate traffic zone boundary. While the average method vs. the census tract/traffic zone specific method essentially results in the same total City resident population, it was determined that the census tract/traffic zone-specific method provides a more accurate and realistic picture of where the residential population actually exists within the City. As an example, the census tracts in the Downtown core have much lower persons per unit numbers than census tracts in suburban areas. Such locational differences are particularly important in terms of park and recreation planning and in school planning. The end result is a more spatially accurate set of population estimates and projections.

Employment Projections—In the non-residential category, the amount of existing and projected square feet, or rooms in the case of hotels, multiplied first by occupancy rates and then by non-residential square footage to employment conversion factors. Occupancy rates of 85% for office, 75% for retail, 80% for industrial and hospital, 65% for hotel, and 50% for civic/government categories, were used for the April 1, 2017 estimate, the year-end 2018 estimate, and the 2020 to 2045 time periods. The 50% rate for civic/government takes into account church properties.

The following non-residential square footage to employment conversion factors were utilized:

Land Use	Multiplier
Office	1 employee per 290 square feet
Retail/Commercial	1 employee per 425 square
Industrial	1 employee per 900 square feet
Hotel	0.5 employees per room
Hospital	1 employee per 230 square feet
Civic/Government	
(non-OIA)	1 employee per 1,430 square feet
Civic/Government	
(OIA Terminal)	328 employees/MAP (million annual passengers)
(OIA Terminal Support)	62 employees/MAP (million annual passengers)

These factors were derived from Real Estate Research Consultants, Inc., 1993, A Perspective on the Mid-Florida Regional Economy—City of Orlando Edition, and updated/revised following consultation with economist Chris Jones (formerly with MSCW, Inc.). Employment for Orlando International Airport traffic zones was generated differently, using a set of multipliers based on annual passenger traffic. The OIA multipliers were provided by the Greater Orlando Aviation Authority and their transportation consultant HDR, Inc., and were also used by MetroPlan for regional transportation planning purposes.

Residential & Non-Residential Allocations by Subarea

The following information describes the general allocations of 2020-2045 projected residential and non-residential growth by subarea and MetroPlan designated 2030 traffic analysis zone (see Appendix M for maps of each subarea and traffic analysis zone).

Residential Allocations by Subarea

- **Northwest**—The northwest subarea of Orlando is located generally west of Interstate 4 and north of the East-West Expressway and Old Winter Garden Road, and is considered a mostly built-out part of the City. This subarea contains older established neighborhoods such as College Park, Spring Lake, Rock Lake, Lorna Doone, and Rosemont. Within these areas, residential growth consists mostly of single-family infill, some anticipated intensification within College Park (along Edgewater Drive in particular), and additional growth in the Rosemont area. As of December 31, 2018, the northwest area had 7,725 single-family dwelling units and 7,789 multifamily dwelling units, with a 50% - 50% single-family to multifamily split. A net increase of 48 single family units and 5,814 multifamily units are projected between 2019 and 2045. By far, the greatest amount of residential growth (over 3,000 mf units) is anticipated to occur as part of the Packing District project west of College Park.
- **Northeast**—Similar to the northwest area, northeast Orlando is characterized by older, well-established neighborhoods with a relatively small amount of vacant residentially-zoned land.

Northeast Orlando consists of areas east of Interstate 4 and north of the East-West Expressway, including the Colonialtown North and South, ParkLake/Highland, Lake Rowena, and Audubon Park neighborhoods. As of December 2018, there were 6,183 single-family homes and 7,327 multifamily homes in the northeast, representing a 46% to 54% single-family to multifamily split. While the northeast is built out to a great extent, this area of the City also contains the site of the former Orlando Naval Training Center, now known as the Baldwin Park neighborhood. With the remaining development of Baldwin Park factored in, along with other redevelopment projects such as Broadstone Lakehouse, the Yard @ Ivanhoe, Alexan at Fashion Square Mall , and transit-oriented development in the Florida Hospital Health Village (i.e., SunRail), it is anticipated that the northeast area will grow by 47 single-family homes and 2,760 multifamily units between 2019 and 2045.

- **Downtown**—Downtown Orlando contains the core area of Orlando from Lake Ivanhoe to the north, Gore Street to the south, Mills Avenue to the east, and the Orange Blossom Trail to the west. Downtown Orlando has undergone a tremendous resurgence in terms of residential development over the past decade and a half, particularly in the North Quarter, Thornton Park, East Central Boulevard and South Eola areas. As of December 31, 2018, Downtown Orlando had 999 single-family units and 13,137 multifamily units, representing a 7% to 93% single-family to multifamily split.

With the advent of significant high-rise and mid-rise developments such as Golden Sparrow, Zoi House, the Creative Village PD (UCF Student Housing, Amelia Court & Modera CV), Parramore Oaks, Modera Central (completed in Spring 2019), and Crescent Lucerne (completed in Spring 2019) it is anticipated that Downtown Orlando will grow by 164 single-family units and 7,938 new multifamily units during the 2019-2045 planning period. These numbers reflect the continued intensification of Downtown, as can be expected for a growing central city focused on transit.

- **Southwest**—The southwest subarea, located west of Interstate 4 and south of the East-West Expressway and Old Winter Garden Road has a number of older, well-established neighborhoods including Lake Sunset, Clear Lake, Catalina, Washington Shores, Richmond Heights and Carver Shores. Within these areas, moderate single-family and multifamily infill is assumed. The southwest area is anticipated to experience significant multifamily growth. As of December 31, 2018, southwest Orlando contained 8,148 single-family units and 32,573 multifamily units, representing a 20% to 80% single-family to multifamily split. This large disparity in residential use type is directly related to the service nature of employment opportunities in the immediate area, including the International Drive, Universal Studios, and Millenia Mall areas. It is anticipated that there will be approximately 79 new single-family units and 6,470 new multifamily units built in the southwest between 2019 and 2045. With those units accounted for, the single-family to multifamily mix is anticipated to be approximately 17% to 83% by 2045. There is some concern that such an imbalance of single-family to multifamily units, coupled with a predominant service economy, may have detrimental long-term impacts on the livability of portions of the southwest Orlando area.

- **Southeast**—Southeast Orlando, generally located south of the East-West Expressway and east of Interstate 4, contains a number of established neighborhoods including Delaney Park, Wadeview Park, Dover Shores, Mariner’s Village, Bryn Mawr, Englewood Park and Ventura. The anticipated residential growth in these areas will be moderate. As of December 31, 2018, there were 19,374 single family units and 31,415 multi-family units located in the Southeast planning area, with a single-family to multifamily mix of 38% to 62%.

The southeast part of Orlando also contains three large greenfield areas where significant residential development is anticipated. The first area, Vista East, consists of several large projects including Vista Lakes, Crowntree Lakes, Tivoli Woods which are essentially built out, as well as the vacant Vista Park property, all of which are located north of the BeachLine Expressway and east of Narcoossee Road. The second area consists of the Southeast Orlando Sector Plan area, which includes over 10,000 acres of property located south of the BeachLine Expressway. The largest project in this area is the +/-7,000 acre Lake Nona DRI/PD. The third area consists of the Storey Park (aka Wewahootee PD) and Starwood PDs. These projects are located east of the Central Florida Greenway (SR 417). These areas will experience by far the most housing and population growth in the City over the 30-year projection period.

In total, the southeast Orlando subarea is expected to grow from 19,374 single-family units and 31,415 multifamily units (December 31, 2018) to 32,882 single-family units and 47,836 multi-family units by 2045, an increase of 13,508 single-family units and 16,421 multifamily units in just 30 years. The housing unit mix will shift towards single family, with a projected 2045 figure of 41% single family and 59% multifamily. These housing units translate into residential population growth of 71,082 people between 2019 and 2045. Interestingly, the southeast represents more than 61% of the total resident population growth anticipated for the City of Orlando as a whole.

The following figures summarize the projected single-family and multifamily dwelling unit growth, and resident population growth, between 2018 and 2045 for each subarea and for the City of Orlando as a whole. Associated maps graphically depict single-family and multifamily unit growth, and resident population growth, for the same time period. Please see Appendices A and B for traffic zone specific residential and population projections.

Figure 7—Summary of Single-Family Residential Unit Growth by Subarea from 2018 to 2045

	December 31, 2018	2045	Change/Growth 2019-2045 (Units)	Change/Growth 2016-2045 (%)
Northwest	7,725	7,773	+48	+0.62%
Northeast	6,183	6,230	+47	+0.76%
Downtown	999	1,163	+164	+16.42%
Southwest	8,148	8,227	+79	+0.97%
Southeast	19,374	32,882	+13,508	+69.72%
Orlando Total	42,429	56,275	+13,846	+32.63%

Figure 8—Summary of Multifamily Residential Unit Growth by Subarea from 2018 to 2045

	December 31, 2018	2045	Change/Growth 2019-2045 (Units)	Change/Growth 2016-2045 (%)
Northwest	7,789	13,603	+5,814	+74.64%
Northeast	7,327	10,087	+2,760	+37.67%
Downtown	13,137	21,075	+7,938	+60.42%
Southwest	32,573	39,043	+6,470	+19.86%
Southeast	31,415	47,836	+16,421	+52.27%
Orlando Total	92,241	131,644	+39,403	+42.72%

Figure 9—Summary of Resident Population Growth by Subarea from 2018 to 2045 (“Bottom-Up” from Traffic Zones)

	December 31, 2018	2045	Change/Growth 2019-2045 (People)	Change/Growth 2016-2045 (%)
Northwest	33,625	46,131	+12,506	+37.20%
Northeast	27,936	33,365	+5,429	+19.43%
Downtown	23,146	36,122	+12,976	+56.10%
Southwest	87,723	101,374	+13,651	+15.56%
Southeast	112,780	183,862	+71,082	+63.03%
Orlando Total	285,210	400,854	+115,644	+40.55%

Figure 10—Existing and Projected Single Family Housing Unit Distribution, 2017 and 2045

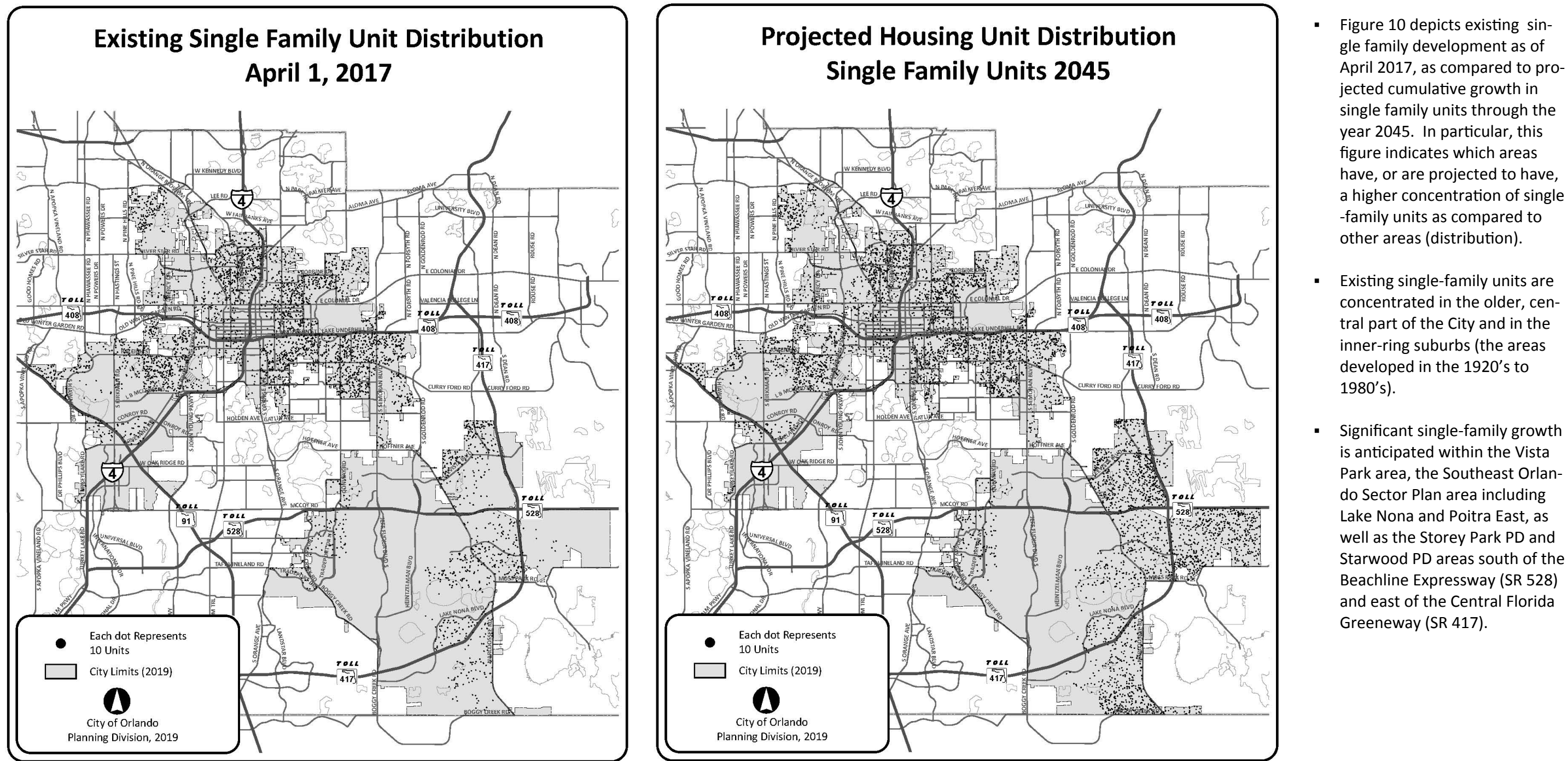


Figure 11—Existing and Projected Multifamily Housing Unit Distribution, 2017 and 2045

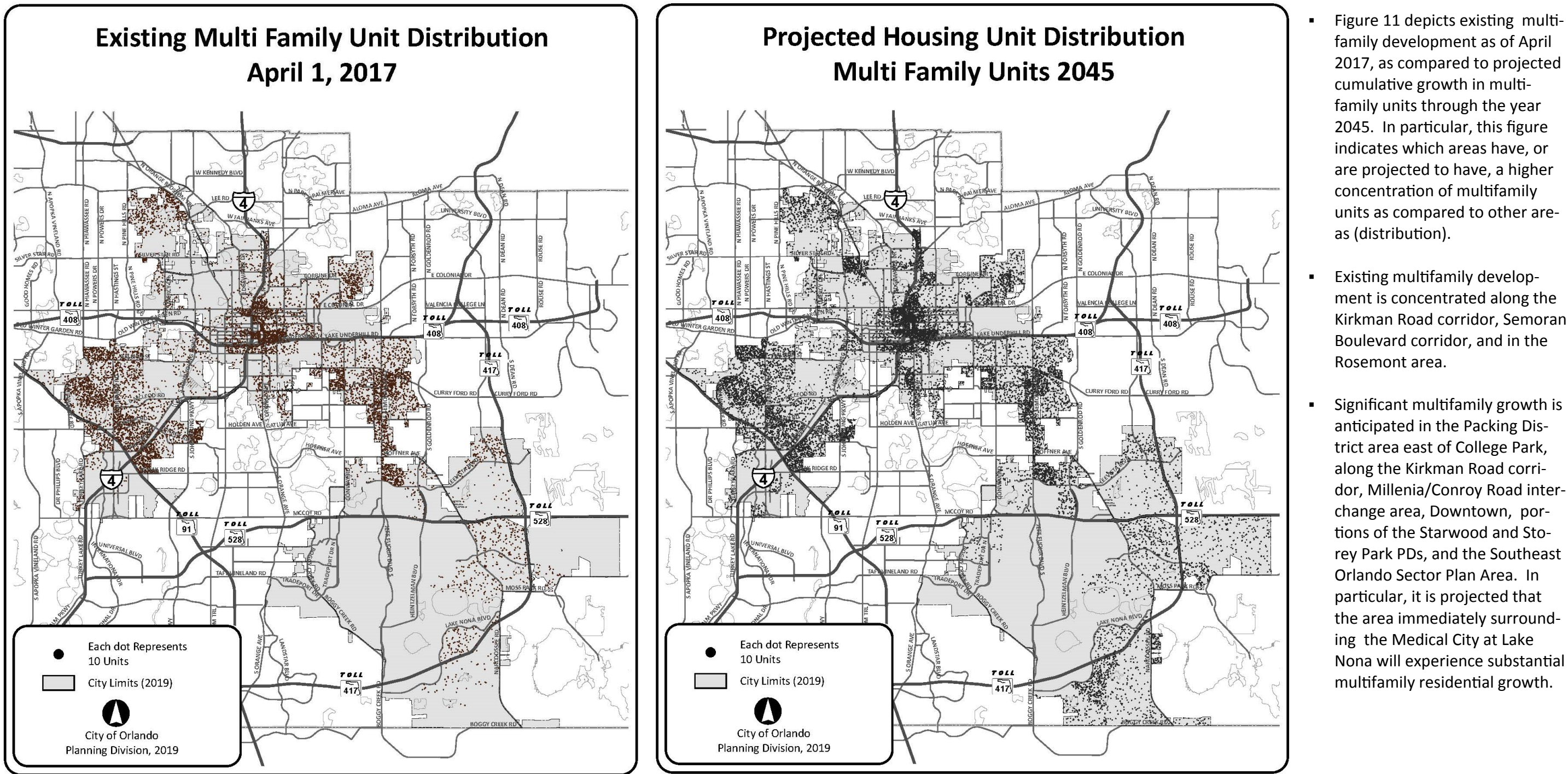
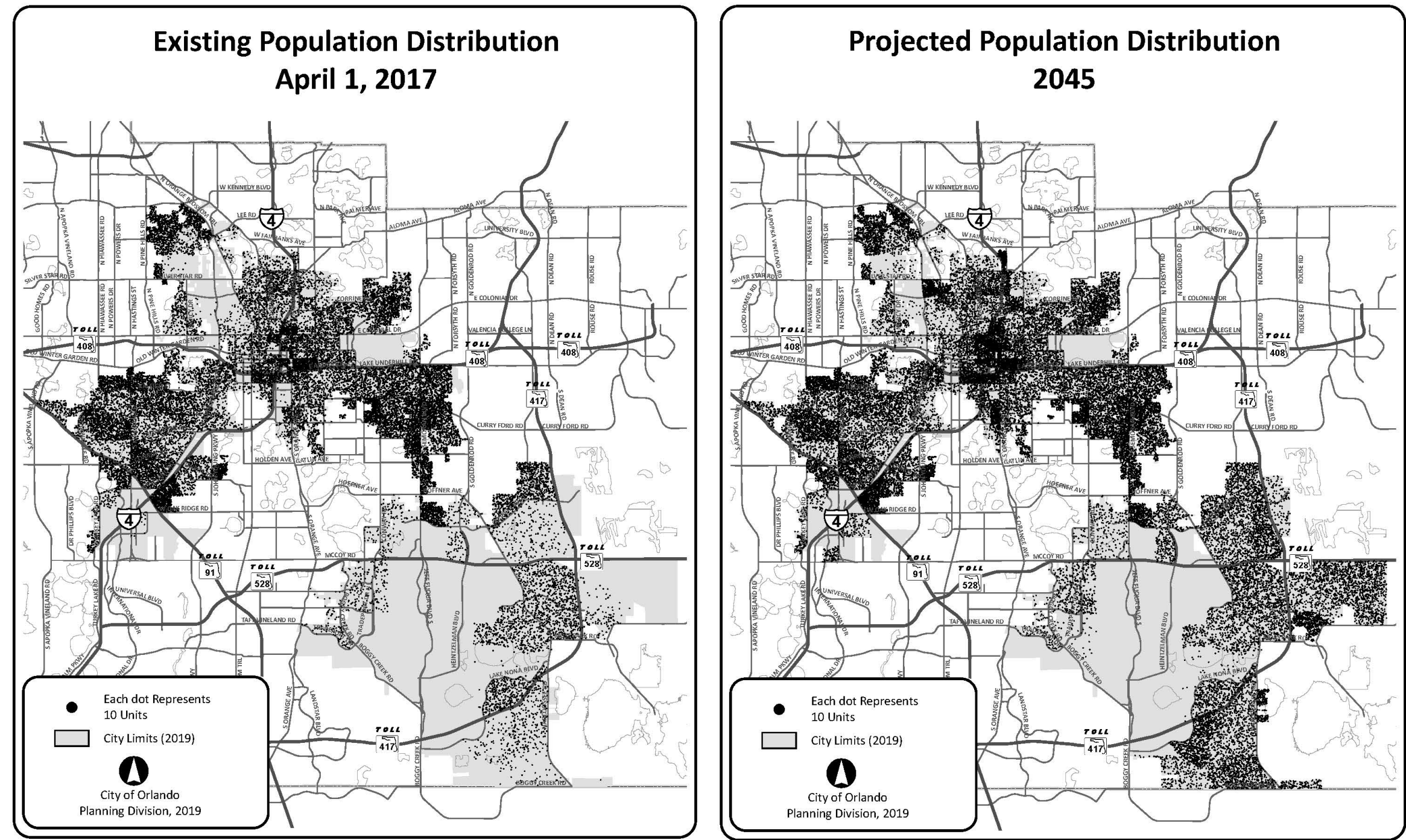


Figure 12—Existing and Projected Population Distribution, 2017 and 2045



- Figure 12 depicts existing resident population as of April 2017, as compared to projected cumulative growth in population through the year 2045. In particular, this figure indicates which areas of the City have, or are projected to have, a higher concentration of population as compared to other areas of the City (distribution).
- Existing population is located within the center city zones and inner-ring suburbs, and along the Semoran Boulevard and Kirkman Road corridors.
- Significant population growth is anticipated within the Packing District east of College Park, Vista Park, the Millenia/Conroy Road area, Downtown, Storey Park PD, Starwood PD, and the Southeast Orlando Sector Plan area, particularly in Lake Nona and Poitras East. By far, the largest amount of population growth in the City will occur in the Southeast Orlando Sector Plan area over the next 30 years.

Non-Residential Allocations by Subarea—The non-residential growth projections identify anticipated development for office, retail, hotel, industrial, hospital, and civic/government land uses. It should be noted that civic/government space includes the square footage of Orlando’s many churches. In previous Growth Projections reports (prior to 2002), such uses were omitted. Therefore, it may be difficult to make a direct comparison between this set of projections and pre-2002 data sets for the civic/government category. Growth in government office space, such as City Hall or the Orange County Administration Center, has also been included within the office land use estimates and allocations to more accurately reflect its traffic impact characteristics.

- **Northwest**—The northwest subarea includes established businesses along West Colonial Drive, Silver Star Road and North Orange Blossom Trail, the College Park commercial area, the Dr. Phillips area, and a substantial inventory of industrial businesses in the Shader Road area. While this area lacks a large inventory of vacant land and is close to built-out, there is a significant amount of infill and redevelopment activity anticipated. The Packing District project is anticipated to include conversions of industrial space into office and retail space, as well as mixed use residential/commercial redevelopment. New industrial growth will be moderate, made up mostly of warehouse distribution. No increase in hospital space or hotel rooms is projected in this subarea. In terms of civic/government space, there will likely be an overall reduction caused by the redevelopment of the Calvary Assembly property, with the most significant project being the expansion of the Orlando Science K-8. Employment in the northwest subarea is expected to increase by approximately 3,346 people, from 31,194 at year-end 2018 to 34,540 in 2045, representing a 10.73% increase during the 30-year projection period.
- **Northeast**—The northeast subarea is characterized by large areas of established businesses along East Colonial Drive and Mills Avenue, where opportunities for infill and redevelopment such as the The Yard project exist. It is anticipated that retail redevelopment will occur along Colonial Drive, particularly those commercial properties adjacent to the Orlando Executive Airport and controlled by the Greater Orlando Aviation Authority. Additional redevelopment is anticipated along the Virginia Drive and Alden Road corridors, as well as redevelopment/intensification of the Fashion Square Mall site. The northeast area also contains the Advent Health Village PD, which is home to one of Orlando’s four SunRail stations, where additional retail, hotel, and a significant amount of medical office and hospital growth is projected. Employment in the northeast subarea is expected to increase by 6,860 people, from 38,982 at the end of 2018 to 45,842 in 2045, representing a 17.60% increase during the 30-year projection period.
- **Downtown**—The Downtown Orlando subarea is characterized by the highest intensities of development found anywhere in the Central Florida region. Based on the Downtown DRI and market trend analysis, staff has projected a significant amount of development and redevelopment in the Downtown area, both within the Central Business District and within the supporting areas north of Colonial Drive and west of Interstate 4. Downtown Orlando is home to two SunRail stations (the Church Street Station and Lynx Central Station), where transit-oriented development is already under con-

struction. It is anticipated that Downtown Orlando will experience growth totaling 1.2 million office square feet, 773,000 retail square feet, 1,386 hotel rooms, and 806,439 square feet of civic/government space during the next 30 years. It is also projected that industrial space will decrease by approximately 78,879 square feet during that same time period. Major projects include the Creative Village PD, Orlando Magic Sports & Entertainment District, Tremont Tower, the redevelopment of the Orlando Sentinel site, and the second phase of the Dr. Phillips Performing Arts Center. Employment in the Downtown subarea is expected to increase by 5,904 people, from 55,512 at the end of 2018 to 61,416 in 2045, representing a 10.64% increase during the upcoming 30-year projection period.

- **Southwest**—The southwest subarea includes the Kirkman Road and International Drive areas, Universal Studios, the MetroWest DRI, Veranda Park, the Orlando Health (ORHS) PD hospital campus, the Millenia Mall and surrounding commercial properties, along with additional neighborhood and community commercial districts serving existing residential areas. This area has a high concentration of tourist/service sector jobs, and a huge number of existing and projected hotel rooms. There are currently 18,019 hotel rooms in this part of the City, with an additional 7,854 rooms projected over the next 30 years. Most of these rooms are or will be located along International Drive such or on/near Universal Studios. Office and retail growth is anticipated within the Millenia DRI and Veranda Park, and along the International Drive corridor. It is also anticipated that the Universal Studios complex will continue to expand during the projection period. Based on the master plan for the Orlando Health PD hospital campus (home of the City’s fourth SunRail station), and infill development/redevelopment envisioned in the South Downtown Redevelopment Plan, it is anticipated that hospital space will grow by over 1.76 million square feet during the planning period. Civic/government growth will consist of church and school expansions. Employment in the southwest subarea is expected to increase by 14,191 jobs, from 77,670 at year-end 2018 to 91,861 in 2045, representing a significant 18.27% increase during the 30-year projection period.
- **Southeast**—The southeast is geographically the largest of the subareas, and contains both well-established business areas along South Orange Avenue, Michigan Street, Curry Ford Road and Semoran Boulevard, as well as large greenfield areas where significant non-residential development is anticipated over the next 30 years. The southeast includes the Orlando International Airport (OIA), which is projected to expand by millions of square feet with the addition of a new southern terminal (under construction as of June 2019) and support aviation facilities. The OIA acts as a center/magnet for numerous industrial, warehouse/distribution and office uses. There are nearly a dozen DRI-level projects centered around the OIA, including LeeVista, Airport Lakes, Semoran Commerce Center, Lake Nona, Vista Park, Airport Industrial Park Orlando, and the Poitras property. A medical services cluster known as the Medical City is underway within Lake Nona, which is the home of the UCF Medical School, Sanford-Burnham-Prebys Discovery Center, Nemours Children’s Hospital, and VA hospital. The amount of non-residential growth anticipated in the southeast is truly phenomenal, amounting to more than 8.6 million square feet of office, 4.6 million square feet of retail space, 4,682 hotel rooms, 13.4 million square feet of industrial space, 1.2 million square feet

of hospital space, and 6.3 million square feet of civic/government space. Much of this growth will occur within the Southeast Orlando Sector Plan area, which is located south of the BeeLine Expressway, south and east of the OIA. Employment in the southeast subarea is expected to increase by 61,588 people, from 61,622 at the end of 2018 to 123,210 in 2045, representing an astounding 99.94% increase during the 30-year projection period.

The following figures summarize projected office, retail, hotel, industrial, hospital, and civic/government growth, and employment growth, between year-end 2018 and 2045 for each sub-area and for the City of Orlando as a whole. Associated maps graphically depict employment growth for the same time period. Please see Appendices C-I for traffic zone specific non-residential and employment projections.

Figure 13—Summary of Office Space Growth by Subarea from 2018 to 2045

	December 31, 2018 (Sq. Ft.)	2045 (Sq. Ft.)	Change/Growth 2019-2045 (Sq.Ft.)	Change/Growth 2019-2045 (%)
Northwest	3,021,539	3,689,539	+668,000	+22.11%
Northeast	5,401,218	6,875,231	+1,474,013	+27.29%
Downtown	16,050,465	17,342,143	+1,291,678	+8.05%
Southwest	7,917,162	8,809,623	+892,461	+11.27%
Southeast	4,422,084	13,105,781	+8,683,697	+196.37%
Orlando Total	36,812,468	49,822,317	+13,009,849	+35.34%

Figure 14—Summary of Retail Space Growth by Subarea from 2018 to 2045

	December 31, 2018 (Sq. Ft.)	2045 (Sq. Ft.)	Change/Growth 2019-2045 (Sq.Ft.)	Change/Growth 2019-2045 (%)
Northwest	3,790,120	4,240,266	+450,146	+11.88%
Northeast	5,463,177	5,759,473	+296,296	+5.42%
Downtown	2,390,032	3,163,092	+773,060	+32.35%
Southwest	14,570,034	15,740,461	+1,170,427	+8.03%
Southeast	6,249,582	10,907,242	+4,657,660	+74.53%
Orlando Total	32,462,945	39,810,534	+7,347,589	+22.63%

Figure 15—Summary of Hotel Room Growth by Subarea from 2018 to 2045

	December 31, 2018 (Rooms)	2045 (Rooms)	Change/Growth 2019-2045 (Rooms)	Change/Growth 2019-2045 (%)
Northwest	914	914	+0	+0.00%
Northeast	390	725	+335	+85.90%
Downtown	1,955	3,341	+1,386	+70.90%
Southwest	18,019	25,873	+7,854	+43.59%
Southeast	4,393	9,075	+4,682	+106.58%
Orlando Total	25,671	39,928	+14,257	+55.54%

Figure 16—Summary of Industrial Space Growth by Subarea from 2018 to 2045

	December 31, 2018 (Sq. Ft.)	2045 (Sq. Ft.)	Change/Growth 2019-2045 (Sq.Ft.)	Change/Growth 2019-2045 (%)
Northwest	14,550,430	15,049,793	+499,363	+3.43%
Northeast	1,819,604	2,012,925	+193,321	+10.62%
Downtown	1,557,834	1,478,955	-78,879	-5.06%
Southwest	12,482,678	13,179,869	+697,191	+5.59%
Southeast	15,933,920	29,304,565	+13,370,645	+83.91%
Orlando Total	46,344,466	61,026,107	+14,681,641	+31.68%

Figure 17—Summary of Hospital Space Growth by Subarea from 2018 to 2045

	December 31, 2018 (Sq. Ft.)	2045 (Sq. Ft.)	Change/Growth 2019-2045 (Sq.Ft.)	Change/Growth 2019-2045 (%)
Northwest	310,897	310,897	0	0%
Northeast	3,042,095	3,509,087	+466,992	+15.35%
Downtown	117,194	117,194	0	0%
Southwest	2,563,542	4,329,059	+1,765,517	+68.87%
Southeast	1,978,421	3,207,416	+1,228,995	+62.12%
Orlando Total	8,012,149	11,473,653	+3,461,504	+43.20%

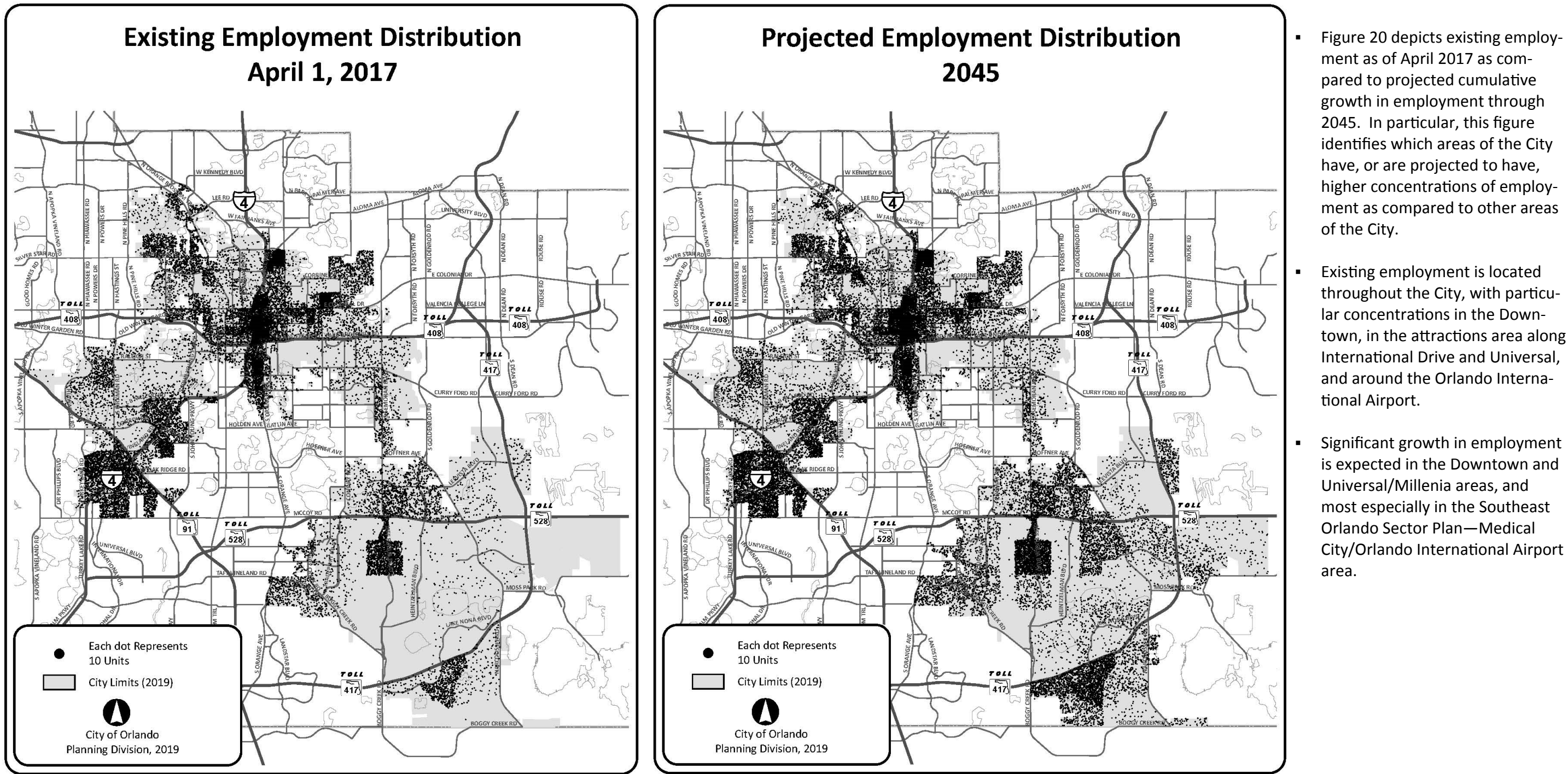
Figure 18—Summary of Civic/Government Space Growth by Subarea from 2018 to 2045

	December 31, 2018 (Sq. Ft.)	2045 (Sq. Ft.)	Change/Growth 2019-2045 (Sq.Ft.)	Change/Growth 2019-2045 (%)
Northwest	2,547,947	2,825,631	+277,684	+10.90%
Northeast	1,549,310	1,769,136	+219,826	+14.19%
Downtown	4,407,852	5,214,291	+806,439	+18.30%
Southwest	3,345,978	3,515,718	+169,740	+5.07%
Southeast	8,454,097	14,817,758	+6,363,661	+75.27%
Orlando Total	20,305,184	28,142,534	+7,837,350	+38.60%

Figure 19—Summary of Employment Growth by Subarea from 2018 to 2045 (Bottom-Up by Traffic Zone)

	December 31, 2018 (Employees)	2045 (Employees)	Change/Growth 2019-2045 (Employees)	Change/Growth 2019-2045 (%)
Northwest	31,194	34,540	+3,346	+10.73%
Northeast	38,982	45,842	+6,860	+17.60%
Downtown	55,512	61,416	+5,904	+10.64%
Southwest	77,670	91,861	+14,191	+18.27%
Southeast	61,622	123,210	+61,588	+99.94%
Orlando Total	264,980	356,869	+91,889	+34.68%

Figure 20—Existing and Projected Employment Distribution, 2017 and 2045



Service Population Allocations by Subarea

As mentioned previously, the City has determined the need to track “service population”, which includes all those people that may have an impact on City services during any given day. This “service population” (or daytime population), while somewhat difficult to estimate, is much larger than Orlando’s resident population and includes tourists, the homeless, and employees (over and above resident employees) that travel to and work in the City during any given day. Service population has an impact on all infrastructure services, particularly Fire and Police. While growth is anticipated in all subareas, as with population and employment, it is anticipated that the greatest amount of service population growth will occur in the southeast subarea.

The following figures summarize projected service population growth between 2018 and 2045 for each sub-area and for the City of Orlando as a whole. Associated maps graphically depict service population growth for the same time period. Please see Appendix J for traffic zone specific service population projections.

Figure 21—Summary of Service Population Growth by Subarea from 2018 to 2045 (“Bottom-Up” from Traffic Zones)

	December 31, 2018	2045	Change/Growth 2019-2045	Change/Growth 2019-2045 (%)
Northwest	42,948	56,415	+13,467	+31.36%
Northeast	38,468	46,102	+7,634	+19.85%
Downtown	68,016	87,611	+19,595	+28.81%
Southwest	131,442	158,988	+27,546	+20.96%
Southeast	135,024	228,301	+93,277	+69.08%
Orlando Total	415,898	577,417	+161,519	+38.84%

Figure 22—Existing and Projected Service Population Distribution, 2017 and 2045

