
GROWTH MANAGEMENT PLAN INDICATORS

2023 ANNUAL REPORT

(January 1, 2023– December 31, 2023)

March 1, 2024



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

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EXHIBITS

Exhibit 1: Baseline Conditions and Annual Indicators

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CITY OF ORLANDO

GROWTH MANAGEMENT PLAN INDICATORS

2023 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 2023

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 2023, population is 331,300, and it grew by 5,700 since last year. The previous year (2022) estimate 325,600 was adjusted to coincide with the latest Bureau of Economic and Business Research (BEBR) population numbers and the 2022-2050 Growth Projections Report.

New development consists of:

- 747 single family units
- 3,552 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 2023, employment is 297,025. The previous year (2022) estimate 292,241 was adjusted to coincide with the 2022-2050 Growth Projections Report.

New development consists of:

- -38,799 sq. ft. commercial
- 349,320 sq. ft. office
- 156 hotel rooms
- 998,968 sq. ft. industrial
- 157,124 sq. ft. hospital
- 19,282 sq. ft. civic

3. PROJECTS COMPLETED

The following large-scale projects received a certificate of occupancy during calendar year 2023. 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	
Storey Park – Urbon at Lake Nona Apartments	BLD2020-15381	9248 Moss Preserve Pkwy	45 du	169 du
	BLD2019-22394	9320 Moss Preserve Pkwy	2 du	
	BLD2020-15385	9328 Moss Preserve Pkwy	29 du	
	BLD2020-15387	9352 Moss Preserve Pkwy	29 du	
	BLD2020-15388		29 du	
	BLD2020-15389	9368 Moss Preserve Pkwy	29 du	
	BLD2019-22386	9240 Moss Preserve Pkwy	2 du	
	BLD2019-22388	9216 Moss Preserve Pkwy	2 du	
	BLD2019-22387	9232 Moss Preserve Pkwy	2 du	
Mission Pointe Apartments	BLD2020-11750	12259 Pioneers Way	44 du	300 du
	BLD2020-11749		88 du	
	BLD2020-11748	12217 Pioneers Way	88 du	
	BLD2020-11131	12203 Pioneers Way	80 du	
Lake Nona Town Center Medical Office	BLD2021-11556	6424 Alexandra Louise Dr	158,728 sq. ft. office	
Fairlawn Village	BLD2020-13834	1491 Mercy Drive	48 du	116 du
	BLD2020-18051	1072 Mercy Drive	30 du	
	BLD2020-13833	1050 Mercy Drive	38 du	
Orlando Health – Jewitt Orthopedic Hospital	BLD2020-15535	60 Columbia Street	14,873 sq. ft. office 21,231 sq. ft. industrial 157,124 sq. ft. hospital	
Deseo Grande	BLD2022-13477	5256 International Drive	94 du	237 du

	BLD2022-13480		47 du	
	BLD2022-13481		35 du	
	BLD2022-13482		29 du	
	BLD2022-13483		32 du	
Hyatt House	BLD2019-17834	5472 Gateway Village Cir	156 hotel rooms	
Cannery Packing District	BLD2019-14555	2501 N Orange Blossom Trl	307 du	
Lake Nona Concorde	BLD2020-18991	10165 Selten Way	24 du	306 du
	BLD2020-18993	10129 Selten Way	30 du	
	BLD2020-18990	10153 Selten Way	30 du	
	BLD2020-18989	10023 Selten Way	24 du	
	BLD2020-18992	10141 Selten Way	30 du	
	BLD2020-18994	10117 Selten Way	24 du	
	BLD2020-17733	10081 Selten Way	30 du	
	BLD2020-18986	10057 Selten Way	30 du	
	BLD2020-18987	10045 Selten Way	30 du	
	BLD2020-17394	10093 Selten Way	24 du	
	BLD2020-18988	10033 Selten Way	30 du	
Beltway Commerce Self Storage	BLD2021-11927	6068 Wooded Pine St	100,176 sq. ft. industrial	
Grand National Apartments	BLD2022-16509	6331 Adriana Avenue	40 du	112 du
	BLD2022-16508		39 du	
	BLD2022-16510		33 du	
Hoffner Avenue Apartments	BLD2021-13725	5063 Hoffner Avenue	24 du	168 du
	BLD2021-13726	5071 Hoffner Avenue	36 du	
	BLD2021-13727	5079 Hoffner Avenue	24 du	
	BLD2021-13724	5103 Hoffner Avenue	24 du	
	BLD2021-13722	5119 Hoffner Avenue	24 du	
	BLD2021-13723	5095 Hoffner Avenue	36 du	
Novel Nona	BLD2020-19220	11929 Pioneers Way	156 du	260 du
	BLD2020-20820	11983 Pioneers Way	104 du	
Lake Nona Town Center HQ Bld B	BLD2019-10287	6876 Marwick Lane	220,330 sq. ft. office	
Trio at Jubilee Park Apartments	BLD2021-14986	7663 Jubilee Park Blvd	40 du	
	BLD2021-14985	7477 Jubilee Park Blvd	60 du	
	BLD2021-14988	7607 Jubilee Park Blvd	52 du	
	BLD2021-14987	7621 Jubilee Park Blvd	40 du	
	BLD2021-14984	7733 Jubilee Park Blvd	52 du	

Alexan at Mills 50	BLD2021-16521	1618 Woodward Street	100 du & 3,428 sq. ft. retail
AIPO Project Lyric – Medical Distribution Warehouse	BLD2021-17762	3056 Tradeport Drive	472,583 sq. ft. industrial
AIPO T-45 (shell)	BLD2022-23083	10963 Florida Crown Dr.	221,737 sq. ft. industrial

4. PROJECTS APPROVED

The following large-scale projects received approval by the Municipal Planning Board or the Development Review Committee during calendar year 2023. 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
Judge Dr. Senior Living (Fern Grove Phase 2)	ZON2022-10024	3750 W.D. Judge Dr.	258 du
Vertical Medical City	MPL2022-10063	1000 N. Orange Ave.	878 du assisted living 94,224 sq. ft. office 378,783 sq. ft. medical office
Mahogany Point Industrial Park	MPL2022-10105	5501 Leevista Blvd.	2,240,660 sq. ft. warehouse
Forestras Property Vehicle Storage	MPL2022-10064	6650 Narcoossee Rd.	170,887 sq. ft. personal storage
Eagle McCoy	MPL2023-10004	7309 Narcoossee Rd.	288 du
Westmoreland Square	ZON2023-10006	1006 W. Colonial Drive	115 du & 6,790 sq. ft. retail
Jetport Park	MPL2023-10018	N of OUC Railroad, E of Wetherbee Rd., & S of Palmbay Dr.	1,535,575 sq. ft. industrial
Lake Ave. & E. Pine St. Mixed Use Tower	MPL2023-10029	350 E. Pine St.	113 du 234 hotel rooms 59,251 sq. ft. commercial uses
AIPO Warehouse – 2900 Tradeport	MPL2023-10035	2900 Tradeport Dr.	215,000 sq. ft. warehouse
AIPO Warehouse – 2050 Tradeport	MPL2023-10037	2050 Tradeport Dr.	246,800 sq. ft. warehouse
AIPO Warehouse – 11001 Palmbay	MPL2023-10036	11001 Palmbay Dr.	321,000 sq. ft. warehouse
Bliss Healthcare	MPL2023-10044	815 Herndon Ave.	78,000 sq. ft. medical office
1155 N. Orange Multi-family	MPL2023-10049	1155 N. Orange Ave.	254 du & 6,270 sq. ft. retail

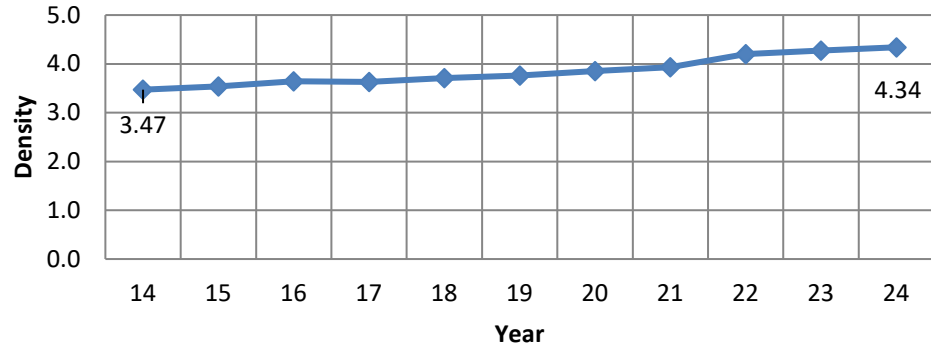
68 S. Ivanhoe Blvd Multi-family	MPL2023-10053	68 S. Ivanhoe Blvd.	312 du
Bregle at West Princeton	CUP2023-10016	2001 Bregle Ave.	142,400 sq. ft. personal storage
Meridian Parks Starwood N-7	MPL2023-10057	N of Wewahootee Rd., E of Folklore Ln, S of SR 528 & W of OUC Railroad	214 du
Meridian Parks Starwood N-13	MPL2023-10060	N of Wewahootee Rd., E of SR 417, S of SR 528 & W of International Corporate Park Blvd.	489 du
10 & 30 S. Ivey Lane Multi-family	MPL2023-10066	10 & 30 S. Ivey Lane	131 du
New Lake Nona Middle School	MPL2022-10104	SW Corner of Luminary Blvd. & Pearson Ave.	200,000 sq. ft. civic (middle school)
One Nona Plaza	MPL2023-10001	N of Tyson Rd., E of Narcoossee Rd. & S of Vickrey Place	282 du
Lake Nona Parcel 20A Office Complex	MPL2023-10006	N of Lake Nona Blvd., W of Helios Blvd., E of Medical City Dr., and S of SR 417	1.8 million sq. ft. office
Mission Pointe II Multi-family	MPL2023-10002	N of Tyson Rd., E of Narcoossee Rd., & S of William Carey Dr,	176 du
Advent Health Narcoossee	MPL2023-10005	E of Narcoossee Rd. & N of SR 417	250,000 sq. ft. hospital 50,000 sq. ft. medical office
New Elementary School at Lake Nona	MPL2023-10022	SW Corner of Luminary Blvd. & Pearson Ave.	100,000 sq. ft. civic (elementary school)
Baldwin Point	MPL2023-10021	2420 Lakemont Ave.	305 du
Advent Health Narcoossee	MPL2023-10041	E of Narcoossee Rd. & N of SR 417	375,000 sq. ft. hospital 75,000 sq. ft. medical office
Lake Nona Parcel 18A Retail	MPL2023-10055	13849 Boggy Creek Rd	405,100 sq. ft. retail
Laureate Park N-2 Phase 2	MPL2023-10061	N of Boggy Creek Rd., E of Centerline Dr., W of Pearson Ave. & S of Luminary Blvd.	215 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 5,700 persons since last year and 77,945 in the last 10 years. City land area has increased 35 acres since last year and 3,292 acres in the last 10 years.¹

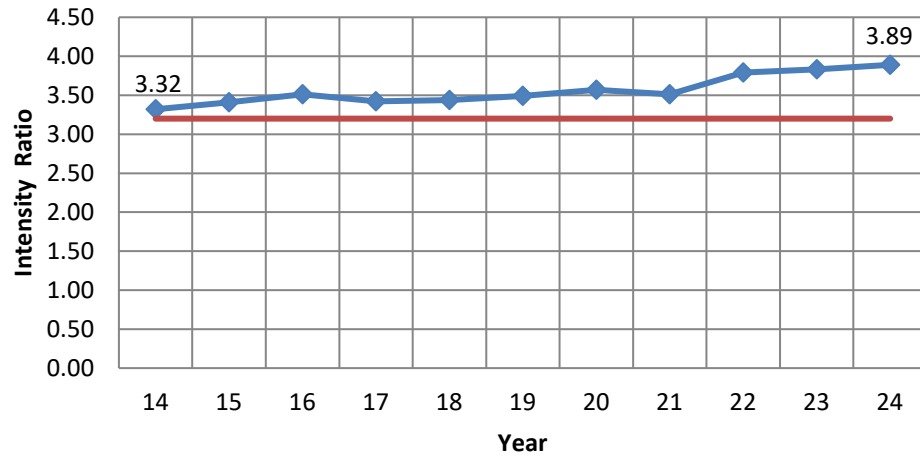
This increase is consistent with the City’s goal to increase residential density. Residential density is expected to rise in the next five years as recently annexed property is developed and downtown redevelopment continues.

¹ Note: Acres of land in the City on January 1, 2024, was calculated as acres of land in the City on January 1, 2023 (76,247) plus acres of land annexed in 2023 (35). The result (76,282) is higher than the acreage calculated using the City GIS system (76,196), but the result is a more accurate indicator of change since last year. The GIS figure is slightly different because the City boundary layer has become more accurate over the years through continuous mapping and technology improvements.

2. EMPLOYMENT DENSITY

A) JOBS PER ACRE

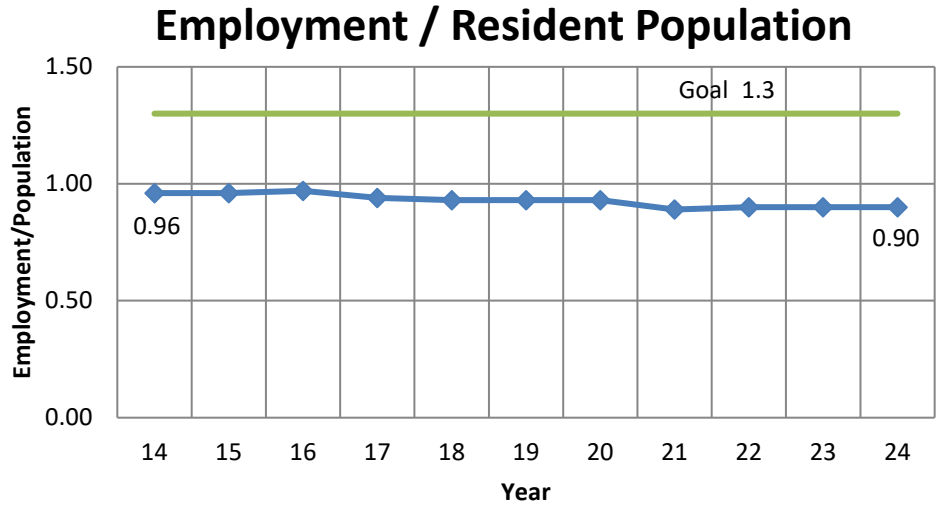
Jobs / Acres of City Land Area



3.2	3.32	3.89	Yes
Goal	2014	2024	Achieved?

Non-Residential Intensity is measured as jobs per acre of City land area. The City gained 4,784 jobs since last year and has gained 54,613 jobs since 2014. The City land area has increased by 35 acres since last year and 3,292 acres in the last 10 years. The current ratio of 3.83 exceeds the City's goal to increase the ratio from 3.07 to 3.2 by 2009. Staff will evaluate creating a new goal for future annual reports.

B) JOBS TO HOUSING RATIO



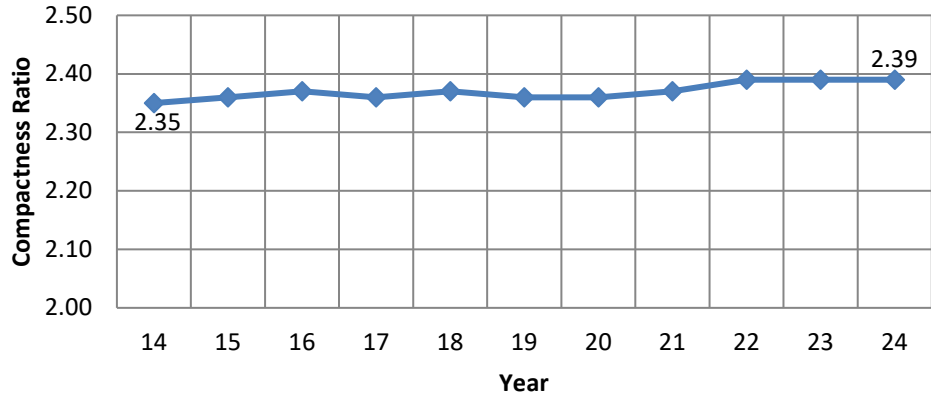
1.02 - 1.3	1.02	0.90	No
Goal	Baseline	2024	Achieved?

Jobs/Housing Balance is measured as a ratio of employment over resident population. The City gained 4,784 jobs since last year and has gained 54,613 jobs since 2014. The resident population increased by 5,700 persons since last year and 77,945 persons in the last 10 years. Based on these figures, the City’s jobs/housing balance ratio remained the same since last year. With the lingering effects of the COVID-19 pandemics, some people are working from home, which is not captured in the data. Given steady population growth over the last year and employment conditions are changing nationwide, it is expected that job growth will gain momentum over the next year as well. The current ratio of 0.90 is just outside the City’s target range of 1.02 to 1.3.

3. COMPACTNESS

A) CITY BOUNDARY

Miles of City Boundary / Square Miles of City Land Area



↓	2.35	2.39	No
Goal	2014	2024	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 35 acres during the past year. The City boundary in miles increased by 0.12 since last year. The increase over time is partly due to annexations, and partly due to GIS software that excludes County or State roads that pass between parcels that are inside City limits. The entire outline is included in the miles of City boundary. If the City were to annex roadway areas such as the Greenway (SR 417), the miles of boundary would drop substantially, but from a practical point of view, the City would not change in compactness.

4. MIXED USE DEVELOPMENT

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

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

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

- GMP Future Land Use Element Objective 2.1

Maintain Mix of Land Uses Within Urban and Metropolitan Activity Centers			
Res.	15 - 30%	15%	Yes
Office	10 - 25%	10%	Yes
Com.	30 - 50%	50%	Yes
PRI	5 - 20%	11%	Yes
Hosp.	1 - 10%	4%	Yes
Ind.	5 - 10%	10%	Yes
Use	GMP Goal	2023	Achieved?

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

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

- GMP Future Land Use Element Objective 2.2

Maintain Mix of Land Uses Within Mixed Use Corridors			
Use	GMP Goal	2023	Achieved?
Res.	10 - 20%	22%	No
Office	10 - 15%	28%	No
Com.	30 - 55%	32%	Yes
PRI	5 - 20%	2%	No
Hosp.	1 - 8%	2%	Yes
Ind.	5 - 15%	14%	Yes

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 2023, the mix of uses within Urban and Metropolitan Activity Centers fell within the target range for all categories: residential, office, commercial, hospital, public and industrial. This is a first that all categories are within the target range and this goal has been met.

The Mixed-Use Corridor indicator has been reviewed to determine if it meets the target ranges. In 2023, the mix of uses within Mixed Use Corridors fell within the target range for segments, commercial, hospital and industrial. The percentage for residential was just over by 2%. The percentage of office use was about 13% over the target range. 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 65% 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	154,363	46%	158,602	54%
Future Corridors	20,761	6%	17,587	8%

The total City population is 331,300. Approximately 52% live within ¼ mile of an existing or future transit corridor. The total employment is 297,025. Approximately 62% of employment centers are within ¼ mile of an existing or future transit corridor.

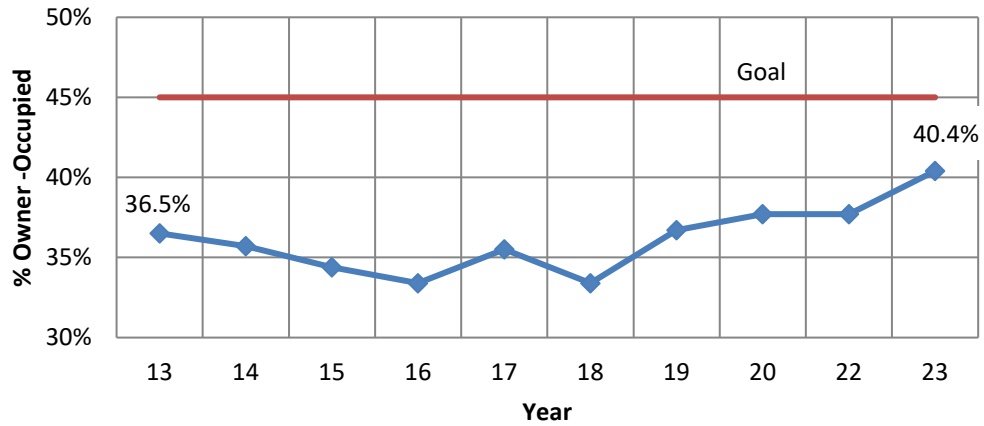
C. HOUSING INDICATORS

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 45,523 units and the number of multi-family is 108,616 units. The percentage of existing multi-family units is 70%. The annual growth rate of multi-family is 0.4%. This growth can be attributed to the City's growing population and employment base.

2. HOUSING TENURE

Owner-Occupied Dwelling Units



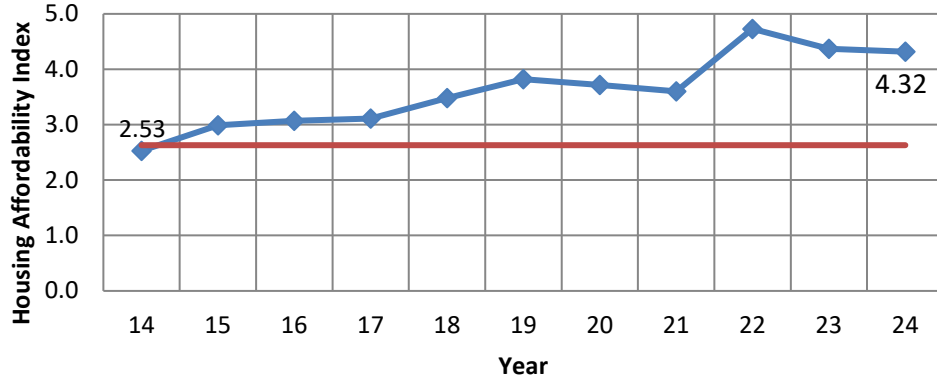
45%	36.5%	40.4%	No
Goal	2013	2023	Achieved?

According to the City Land Use Database there are 154,139 housing units in the City of Orlando at the end of 2023, of which 45,523 are single family units and 108,616 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 is usually drawn from the 2020 U.S. Census sources. According to 2020 Census data for the City of Orlando, there are a reported 140,895 housing units, of which 128,181 (90.9%) are occupied and 12,714 (9.1%) are vacant.

Outside of the Decennial Census, data comes from the American Community Survey (ACS). Last year the data from this source was not available at the time of the publication of this Indicators report for the number of units which are owner-occupied, or renter occupied. The 2022 ACS has been released and it is reported that the City of Orlando has an estimate of 136,364 housing units are occupied. Of that number, 55,097 units (40.4%) are owner-occupied, and 81,267 units (59.6%) are renter-occupied. The percentage of owner-occupied increased and renter occupied has decreased since last year.

3. AFFORDABLE HOUSING

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



Median Home Sales Price / Average Household Income for Family of Four			
<2.63	2.86	4.32	No
Goal	Baseline	2024	Achieved?

Information concerning home prices was obtained from the Orlando Regional Realtor Association for the 4-county Orlando Metropolitan Area (Orange, Seminole, Osceola and Lake counties).² Information concerning median income was obtained from the U.S. Department of Housing & Urban Development.³ According to a report from the Orlando Regional Realtor Association, the median sales price for homes in Metropolitan Orlando in 2023 was \$370,500. This figure is \$5,500 more than last year and is the highest recorded from any Indicators Report. The median income for a family of four in Orange County increased from \$80,100 in 2022 to \$85,700 in 2023. This figure has increased by \$5,600 since last year and is a \$27,200 increase since 2014.

The City’s housing affordability goal is a ratio of 2.63. As of January 1, 2023, the City’s ratio it is 4.32. This figure is 0.24 less than last year but is still greater than the goal ratio. Housing prices are increasing rapidly, and affordability is a great concern now and could be a greater concern in the near future.

² Orlando Regional Realtor Association, Orlando Market Overview, 2023 Statistics at a Glance, January 10, 2024, <https://www.orlandorealtors.org/marketreports>

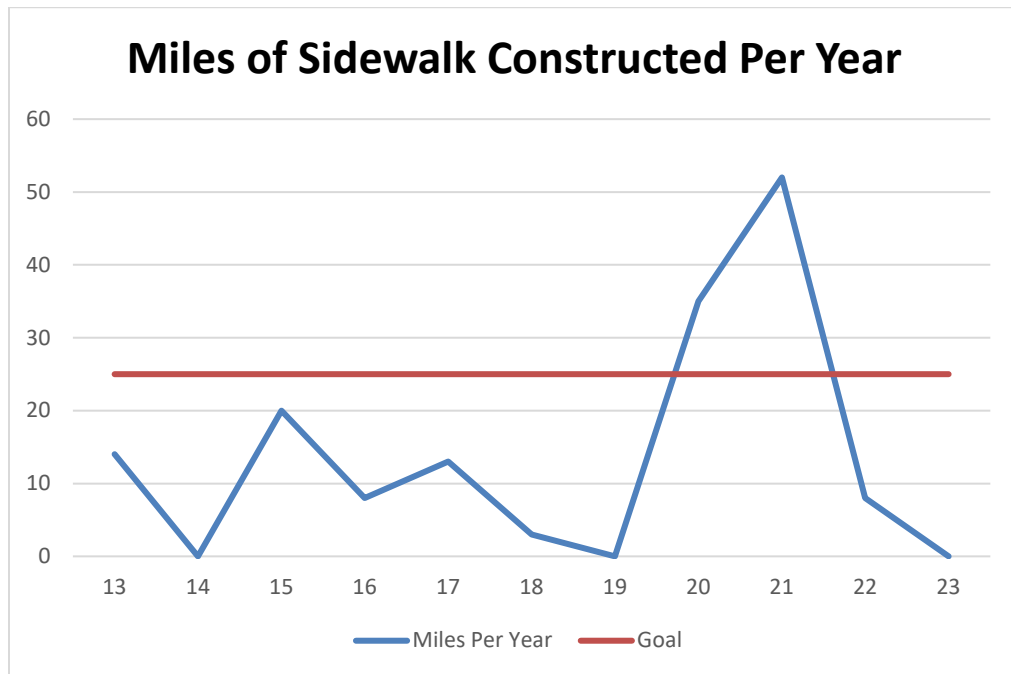
³ U.S. Department of Housing and Urban Development, FY2023 Median Family Income Documentation System, Orlando-Kissimmee, FL MSA Results. <https://www.huduser.gov/portal/datasets/il/il2023/2023summary.odn>

D. TRANSPORTATION INDICATORS

1. MULTI-MODAL INFRASTRUCTURE

A) SIDEWALKS

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



+25/yr	0	No
Goal	2023	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:

- 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
- 1,005 miles on August 1, 2019
- 1,040 miles on August 1, 2020
- 1,092 miles on August 1, 2021
- 1,100 miles on August 1, 2022
- 1,100 miles on August 1, 2023

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 Department reported 0 new miles of sidewalks were constructed by Public Works during 2023. However, sidewalks have been 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 Storey Park, Laureate Park, Poitras and the code requirement to include sidewalks on both sides of each new street, it's possible this goal has been exceeded. The City will continue to update its GIS layer to reflect new development.

B) BIKEWAY FACILITIES

"By 2030, the City shall add at least 46 miles of bikeway facilities to the 410 miles of bikeway facilities already constructed within the City." - GMP Transportation Element Objective 1.26

According to the City's Transportation Department, between July 1, 2022 and June 30, 2023, there were some changes made to the bicycle network which resulted in reduced mileage from last year. The City of Orlando currently has 314 miles of bikeways. In 2023, bikeways include:

Bike Paths:	84 miles
Bike Lanes:	186 miles
<u>Signed Routes:</u>	<u>44 miles</u>
TOTAL:	314 miles

C) TRANSIT CORRIDORS

LYNX provides bus transit service to the City of Orlando. Also, Sunrail is the region's commuter rail service. Citywide, there are 156.4 miles of designated Transit Corridors and 112.9 miles or 72% of those corridors currently have LYNX service available for some portion of a typical day.

Sunrail, a commuter train that is 61.5 miles long and has 17 stations, serves Volusia, Seminole, Orange and Osceola Counties from DeBary to Poinciana. It has 4 stations and covers approximately 6 miles in the City of Orlando.

2. ACTIVE TRANSPORTATION

A) WALK SCORE

Walk Score is a website that measures the walkability of any address based on the distance to nearby places and pedestrian friendliness. Currently on the website, Orlando has a Walk Score of 41 out of 100 which means that people are car-dependent, requiring require a car for most errands. There are some individual neighborhoods that have a higher Walk Score. These neighborhoods are South Eola, Central Business District, and Lake Eola Heights. South Eola has a Walk Score of 91, which is considered a “Walker’s Paradise” where daily errands do not require a car. The Central Business District and Lake Eola Heights both have a Walk Score of 85. This means that they are 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. However, the data on the site has not been updated since 2021. Staff have reached out to walkscore.com to inform them about the outdated walk score data. They have indicated that they are working on updating the data, however at the time of this published report, it has not yet been complete. Staff will continue to monitor the website for more recent updates.

B) BIKE SCORE

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 57 out of 100 which is considered to be bikeable; there is moderate bike infrastructure. This score remained the same since last year. The neighborhoods with the highest Bike Scores in the City are Lake Eola Heights (89), Callahan (88), and Park Lake – Highland (87). These neighborhoods are considered very bikeable 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. Staff have reached out to walkscore.com to inform about the outdated bike score data, which has also not been updated since 2021. They have indicated that they are working on updating the data, however at the time of this published report, it has not yet been complete. Staff will continue to monitor the website for more recent updates.

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, 2023, the vehicles miles traveled in Orange County was 43,315,328. This is an increase from last year by 3,345,052 or 7.7%.

4. MODE CHOICE

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

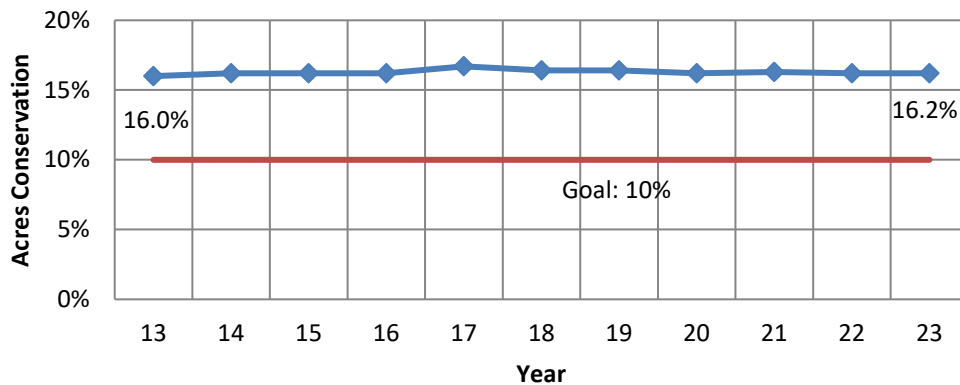
According to the 2022 ACS data for the City of Orlando, of the 175,557 workers that travel to work, 66.7% drive a vehicle alone, 9.2% carpool, 2.3% use transit, 2.7% walk to work and 17.2% work from home. Those that chose to use transit increased by 1.2% from 2021, and those who work from home decreased by 1.9%. This is due to the increase in workers returning to the office after the end of the pandemic.

E. ENVIRONMENTAL INDICATORS

1. CONSERVATION ACREAGE

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

Acres of Conservation in City / Total Acres in City



10%	10.8%	16.2%	Yes
Goal	Baseline	2023	Achieved?

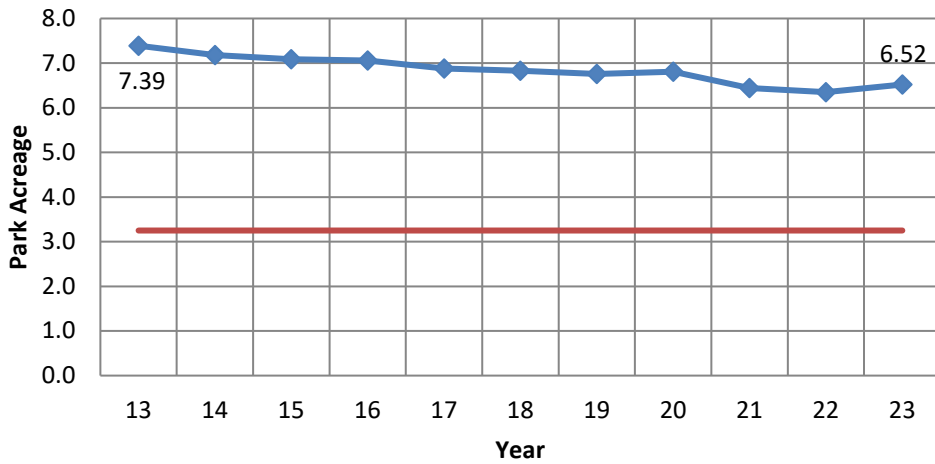
There is currently no accurate way to estimate all open space inside City limits. Open space may occur in any zoning district, may be publicly or privately owned, and may or may not be protected from future development. The next best option is to identify the amount of land that is designated as Conservation 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 35 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 increased 5 acres since last year. Based on these figures, 16.2% 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

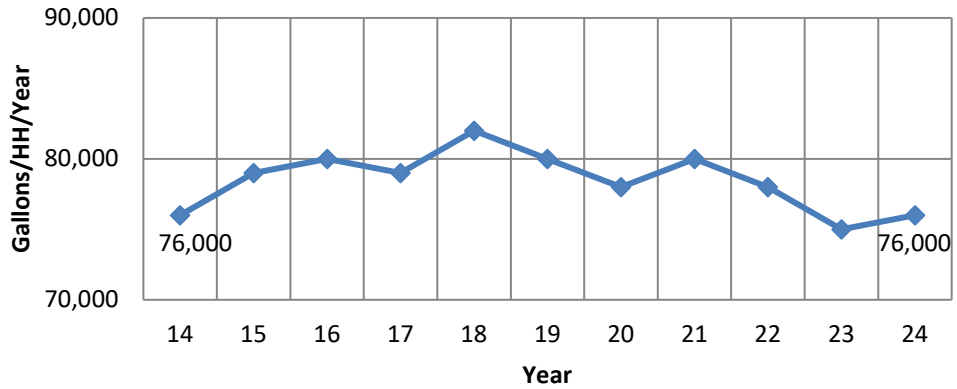


Parks level of service is measured as a ratio of acreage over resident population. The City has 2,161 acres of parks and added 343 acres since 2014. The resident population increased by 5,700 persons since last year and 77,945 persons in the last 10 years. Based on these figures, the City's parks ratio is above the required LOS by 3.27 acres per thousand population. There is currently a surplus of 1,018 acres citywide. In the coming years, the increase in acres will come from the Packing District with the new tennis center, Meridian Park Community Park and Poitras Park.

3. WATER & ENERGY CONSUMPTION

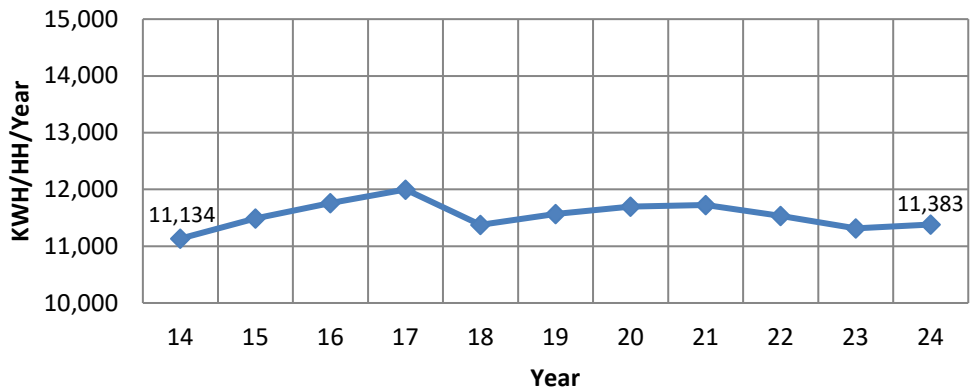
“The City shall reduce total per household potable water demand by an additional 3 percent between 2017 and 2020, and an additional 4 percent by 2040, from a baseline in 2017 of 79,000 gallons per household per year.” - GMP Potable Water Element Objective 1.2.

Annual Average Residential Water Consumption



↓	79,000	76,000	No
Goal	2017 Baseline	2024	Achieved?

Annual Average Residential Electric Consumption



↓	12,301	11,383	No
Goal	Baseline	2024	Achieved?

Water and electric consumption figures were obtained from Orlando Utilities Commission (OUC). Current data indicates that per household water consumption increase by 1,000 gallons or 1.3% when compared to last year and when compared to the 2014 condition it is the same. Data also indicates that energy consumption has increased slightly by 0.6% when compared to last year and decreased by 7.5% when compared to the 2008 baseline condition.

F. Looking Back and Looking Ahead

Data collected over the last ten years show progress toward meeting many goals. As of 2023, the City of Orlando:

- Met its community development goals for residential and non-residential density (B1), jobs per acre (B2a), mixed use development in Metropolitan & Urban Activity Centers(B4), transit access (B5), miles of transit corridors (D1c), conservation (E1), and parks (E2).
- Partially met its community development goals for mixed use development in Mixed-Use Corridors (B4).
- Did not meet its community development goals for compactness (B3a), jobs/housing balance (B2b), affordable housing (C3) and number of new sidewalks (D1a), vehicles miles traveled (D3) and water & energy consumption (E3b).

Major planning accomplishments in 2023 included:

- Evaluation & Appraisal Report
- EAR-based amendments
- Signage LDC Amendments
- Wetlands Study and Standards Review
- 2023 AARP Community Challenge Grant – ADU Education & Outreach Campaign

In addition, the following specific activities will be addressed in 2024:

- Major Growth Management Plan (GMP) Update
- Livable Orlando Age-Friendly Initiative Implementation

* * *

EXHIBIT 1

Baseline Conditions & Community Development Goals

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	1/1/2019	1/1/2020	1/1/2021	1/1/2022	1/1/2023	1/1/2024	Change from Previous Year	Community Development Goal
A1	Population Total		242,908	253,355	258,583	265,531	275,338	281,053	285,210	291,957	298,878	319,793	325,600	331,300	5,700	376,110 projected by 2045
	Single Family Units					40,964	41,444	41,977	42,429	43,102	43,752	44,336	44,776	45,523	747	
	Multifamily Units					87,564	90,141	91,835	92,241	94,793	97,374	100,496	105,064	108,616	3,552	
A2	Employment Total		240,839	242,412	248,966	256,148	259,112	260,841	264,980	270,846	267,035	288,673	292,241	297,025	4,784	Increase
	New Growth															
	Office sq. ft.					95,124	143,170	168,675	299,854	334,906	348,980	227,252	483,529	349,320	(134,209)	
	Retail sq. ft.					230,733	496,882	656,299	428,950	596,643	125,252	244,657	25,797	(38,799)	(64,596)	
	Hotel sq. ft.					507	1,291	423	1,217	1,775	2,299	48	523	156	(367)	
	Indust sq. ft.					1,461,909	641,035	272,541	557,834	2,314,369	1,671,200	604,895	568,669	998,968	430,299	
	Hospital sq. ft.					1,641,654	-	18,019	19,468	-	206,327	24,386	29,982	157,124	127,142	
	Civic sq. ft.					6,289	146,077	665,262	432,868	279,344	80,894	102,843	964,780	19,282	(945,498)	
B1	Population density per sq mile	Population / Acres of City Land Area	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	291,957 75,906 3.85	298,878 76,020 3.93	319,793 76,113 4.20	325,600 76,247 4.27	331,300 76,282 4.34	5,700 35 0.07	Increase
B2a	Non-Residential Intensity	Jobs / Acres of City Land Area	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	270,846 75,906 3.57	267,035 76,020 3.51	288,673 76,113 3.79	292,241 76,247 3.83	297,025 76,282 3.89	4,784 35 0.06	Increase
B2b	Jobs/Housing Balance	Employment / Resident population	240,839 242,908 0.99	242,412 253,355 0.96	248,966 258,583 0.96	256,148 265,531 0.97	259,112 275,338 0.94	260,841 281,053 0.93	264,980 285,210 0.93	270,846 291,957 0.93	267,035 298,878 0.89	288,673 319,793 0.90	292,241 325,600 0.90	297,025 331,300 0.90	4,784 5,700 0.84	Maintain ratio between 1.0 and 1.3.
B3a	Compactness	Miles of City boundary / Sq. Miles of City Land Area	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	279.95 118.5 2.36	281.40 118.6 2.37	284.28 118.8 2.39	284.29 119.0 2.39	284.41 119.1 2.39	0.12 0.1 0.00	Decrease ratio
B4	Mixed-use development.	Maintain mix of land uses within Urban and Metropolitan Activity Centers, as provided in GMP Objective 2.1	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023		<u>2045 Min.</u> <u>2045 Max.</u>
		Residential	14%	14%	13%	14%	13%	14%	14%	14%	13%	13%	15%	15%	0%	15% 30%
		Office	10%	10%	10%	10%	10%	10%	10%	9%	10%	10%	10%	10%	0%	10% 25%
		Commercial	50%	50%	51%	50%	50%	50%	51%	52%	53%	52%	51%	50%	-1%	30% 50%
		Public, Recreational, Institutional	11%	11%	11%	11%	11%	11%	11%	11%	10%	11%	11%	11%	0%	5% 20%
		Hospital	4%	4%	5%	5%	5%	4%	4%	4%	4%	4%	3%	4%	1%	1% 10%
		Industrial	11%	11%	10%	10%	11%	11%	10%	10%	10%	10%	10%	10%	0%	5% 10%
		TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%		
	Mixed-use development.	Maintain mix of land uses within Mixed Use Corridor, as provided in GMP Objective 2.2	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023		<u>2045 Min.</u> <u>2045 Max.</u>
		Residential					17%	16%	16%	18%	17%	21%	21%	22%	1%	10% 20%
		Office					33%	33%	33%	31%	31%	29%	29%	28%	-1%	10% 15%
		Commercial					31%	32%	31%	31%	33%	32%	32%	32%	0%	30% 55%
		Public, Recreational, Institutional					6%	6%	6%	6%	3%	2%	2%	2%	0%	5% 20%
		Hospital					2%	2%	2%	1%	2%	2%	2%	2%	0%	1% 8%
		Industrial					11%	11%	12%	13%	14%	14%	14%	14%	0%	5% 15%
		TOTAL					100%	100%	100%	100%	100%	100%	100%	100%		
B5	Transit Access	Population within 1/4 mile of Transit Corridor			116,883	117,614	95,030	88,411	Note: Data updated with Transit Corridor update	153,944	144,264	148,281	152,999	154,363	1,364	Increase
		Employment within 1/4 mile of Transit Corridor			154,053	155,403	94,664	78,227		166,762	155,054	156,776	158,240	158,602	362	
C1	Housing Mix	Percent multifamily (existing)		67.79%	67.97%	68.13%	68.50%	68.63%	68.49%	68.74%	68.32%	69.39%	70.12%	70.47%	0.35%	Monitor trends
		Percent multifamily (annual growth)				1.9%	2.9%	1.9%	-0.2%	0.4%	-0.6%	1.1%	0.7%	0.4%	0.25%	
C2	Housing Tenure	Owner-Occupied /	37,425	36,986	37,733	37,094	38,542	35,916	41,860	41,239	Not available	49,048	55,097	Not yet available		Increase

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	1/1/2019	1/1/2020	1/1/2021	1/1/2022	1/1/2023	1/1/2024	Change from Previous Year	Community Development Goal
		Total Occupied = % Owner-Occupied	102,564 36.5%	103,466 35.7%	109,685 34.4%	111,100 33.4%	108,523 35.5%	107,590 33.4%	114,176 36.7%	109,454 37.7%		130,037 37.7%	136,364 40.4%		2.7%	
		Renter-Occupied / Total Occupied = % Renter-Occupied	65,139 102,564 63.5%	66,480 103,466 64.3%	71,952 109,685 65.6%	74,006 111,100 66.6%	69,981 108,523 64.5%	71,674 107,590 66.6%	72,316 114,176 63.3%	68,215 109,454 62.3%	Not available	80,989 130,037 62.3%	81,267 136,364 59.6%	Not yet available	-2.7%	
C3	Affordable Housing Ownership	Median home sales price / Average household income for family of four	\$129,000 \$57,400 2.25	\$148,000 \$58,500 2.53	\$164,000 \$54,800 2.99	\$178,788 \$58,300 3.07	\$180,000 \$57,800 3.11	\$203,000 \$58,400 3.48	\$225,000 \$58,976 3.82	\$242,000 \$65,118 3.72	\$245,000 \$68,100 3.60	\$335,000 \$70,800 4.73	\$365,000 \$80,100 4.56	\$370,500 \$85,700 4.32	\$5,500 \$5,600 (0.24)	Maintain ratio less than 2.7
D1a	Pedestrian Access	Miles of sidewalk	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	Aug. 1, 2019 (CAR) 1005	Aug. 1, 2020 (CAR) 1040	Aug. 1, 2021 (CAR) 1092	Aug. 1, 2022 (CAR) 1100	Aug. 1, 2023 (CAR) 1100	0	Add 4 miles per year.
D1b	Miles of bike infrastructure		293.2	317.6	317.6	322.4	338.8	361.5	363.5	364.2	368.9	370.5	310 Note: Change from previous year changes to bike network	314	4	Build 20 miles between 2010 and 2014.
D1c	Miles of Transit Corridors		155.8	155.8	155.8	155.8	155.8	156.5	156.5	156.5	156.5	156.5	156.4	156.4	0	Increase
D2a	Walkscore				39	39	41	42	42	41	41	41	41	41	0	Increase
D2b	Bikescore				52	53	53	53	55	60	60	57	57	57	0	Increase
D3	VMT (County) per person per day		34,099,958	34,904,854	36,389,540	37,201,259	39,723,296	41,752,084	42,527,605	43,869,910	40,336,769	39,970,276	43,315,328	Not yet available	7.7%	Decrease
D4	Work commute Mode split		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%	Drive Alone 82.2%, Carpool 8.4%, Transit 2.8%, Walk 1.2%, Other 1.7%, Work Home 3.6%	Drive Alone 76.7%, Carpool 10.3%, Transit 1.5%, Walk 1.5%, Other 3.2%, Work Home 6.8%	Not available	Drive Alone 68.2%, Carpool 7.6%, Transit 1.1%, Walk 1.0%, Other 3.0%, Work Home 19.1%	Drive Alone 66.7%, Carpool 9.2%, Transit 2.3%, Walk 2.7%, Other 1.8%, Work Home 17.2%	Not yet available	Drive Alone -1.5%, Carpool +1.6%, Transit +1.2%, Walk +1.7%, Other -1.2%, Work Home -1.9%	Transit 5% or more
E1	Conservation	Acres of Conservation in City / Total acres in City	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%	12,419 75,906 16.4%	12,334 76,020 16.2%	12,367 76,113 16.3%	12,372 76,247 16.2%	12,377 76,282 16.2%	5 35 0.0%	20% open space, of which at least 10% conservation.
E2	Parks	Acres of Parks in City / Population	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%	1,988 291,957 6.81%	2,034 298,878 6.81%	2,058 319,793 6.44%	2,066 325,600 6.35%	2,161 331,300 6.52%	95 5,700 0.17%	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.	78,000	76,000	79,000	80,000	79,000	82,000	80,000	78,000	80,000	78,000	75,000	76,000	1,000 1.3%	Decrease

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	1/1/2019	1/1/2020	1/1/2021	1/1/2022	1/1/2023	1/1/2024	Change from Previous Year	Community Development Goal
	* Figures obtained from OUC Annual Report.	Data is system wide (not City-specific).	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*	as of September 30, 2019*	as of September 30, 2020*	as of September 30, 2021*	as of September 30, 2022*	as of September 30, 2023*		
E3b	Per household energy consumption	Annual average residential electric consumption (per household) in KWH.	11,192	11,134	11,488	11,760	11,999	11,378	11,570	11,696	11,727	11,534	11,312	11,383	71	Decrease
	* Figures obtained from OUC Annual Report.	Data is system wide (not City-specific).	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*	as of September 30, 2019*	as of September 30, 2020*	as of September 30, 2021*	as of September 30, 2022*	as of September 30, 2023*	0.6%	

Source: City of Orlando Economic Development Department, City Planning Division March 2024