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# GROWTH MANAGEMENT PLAN INDICATORS

## 2019 ANNUAL REPORT

(January 1, 2019– December 31, 2019)

*March 1, 2020*



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

### 2019 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 2019

##### 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 2019, population is 291,957, and it grew by 6,747 since last year.

New development consists of:

- 661 single family units
- 2,349 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 2019, employment is 270,846, and it grew by 5,866 since last year.

New development consists of:

- 596,643 sq. ft. commercial

- 334,906 sq. ft. office
- 1,775 hotel rooms
- 2,314,369 sq. ft. industrial
- 0 sq. ft. hospital
- 279,344 sq. ft. civic

### 3. PROJECTS COMPLETED

The following large scale projects received a certificate of occupancy during calendar year 2019. 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
M2 at Millenia	BLD2016-05737	4248 Eastgate Drive	175 du
The Distillery	BLD2017-00619	7016 Tavistock Lakes Blvd	157 du
Modera Central	BLD2016-01899	125 E. Pine Street	350 du
Novel Lucerne	BLD2016-07669	815 Main Lane	115 du
	BLD2016-07931	820 Main Lane	173 du
Millenia 700	BLD2016-03476	4206 Eastgate Drive	174 du
Porsche South Orlando	BLD2016-09861	4895 Vineland Road	69,218 sq. ft. retail 145,416 sq. ft. industrial
Holiday Inn Express	BLD2016-09561	10115 William Carey Drive	120 hotel rooms
Loew's Universal Endless Summer Surfside Inn	BLD2017-12341	7000 Universal Blvd	750 hotel rooms
McDonald Flexspace Warehouse	BLD2017-02279	7455 Emerald Dunes Drive	156,284 sq. ft. industrial
AIPO Building D	BLD2017-04417	3057 Tradeport Drive	134,260 sq. ft. industrial
Air Commerce Park Tract B	BLD2017-04153	9620 Air Commerce Pkwy	400,443 sq. ft. industrial
Princeton at College Park	BLD2016-06404	646 W. Smith Street	205 du
Amelia Court in Creative Village	BLD2018-10464	680 W. Concord Street	256 du
Union West	No City BLD	601 W. Livingston Street	126 du 103,000 sq. ft. Civic
UCF Dr. Phillips Academics	No City BLD	500 W. Livingston Street	148,000 sq. ft. Civic
Air Commerce Park	BLD2019-10256	9682 Air Commerce Pkwy	134,492 sq. ft. industrial
City Furniture	BLD2017-07463	4779 Vineland Road	126,818 sq. ft. retail

Universal Advent Health	BLD2016-11242	5881 Turkey Lake Road	76,281 sq. ft. medical office
Church Street Plaza Phase 1	BLD2017-12628	333 S. Garland Avenue	206,600 sq. ft. office 180 hotel rooms

#### 4. PROJECTS APPROVED

The following large scale projects received approval by the Municipal Planning Board, the Southeast Town Design Review Committee, or the Creative Village Development Review Committee during calendar year 2019. 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
Sunsol Hotel	MPL2018-10098	5859 American Way	85,675 sq. ft./141 room hotel
Last Mile Logistics Warehouse & Distribution	MPL2018-10099	1216 S. Orange Blossom Trail	115,280 sq. ft. warehouse
Kennedy Industrial Campus	MPL2018-10086	S of Metrowest Blvd., N of L.B. McLeod Rd., W of President Barack Obama Pkwy., & E of S. Kirkman Rd.	404,800 sq. ft. warehouse
Addison at Gateway	MPL2019-10000	7200 N. Frontage Road	323 du
319 N. Magnolia Mixed Use Hotel	MPL2019-10003	319 N. Magnolia Avenue	232 room hotel, 6,000 sq. ft. retail, 13,750 sq. ft. office
Republic Square Apartments	MPL2019-10005	7430 & 7488 Universal Blvd	350 room hotel
Gardens on Millenia Parcel K	MPL2018-10049	3692 Cathy Street	330 du
S. Goldenrod Area Elementary School	MPL2019-10013	N of LeeVista Blvd., E of S. Goldenrod Rd., S of Marketplace Dr., & W of Narcoossee Rd.	84,956 sq. ft. school
Hyatt House Hotel at Orlando Gateway	MPL2019-10019	5560 Gateway Village Circle	122,356 sq. ft. / 165 room hotel
Veranda Park Apartments Phase 2	MPL2019-10021	6875 Piazza Grande Avenue	320 du
Urban at Audubon Park	MPL2019-10022	3660 Maguire Blvd.	493 du
Vertical Medical City	MPL2019-10023	1000 N. Orange Avenue & 103 W. Marks Street	955 room assisted living facility, 378,783 sq. ft. urgent care, 94,224 sq. ft. R&D office, 20,225 sq. ft. retail

Urbon at Nona	MPL2019-10024	12501 Wewahootee Road	360 du
Storey Park Parcel K	MPL2019-10031	12501 Wewahootee Road	588 du
Poitras East	ZON2019-10015	13870 Narcoossee Road	100,000 sq. ft. retail
Fern Grove Senior Housing	MPL2019-10032	3750 WD Judge Drive	138 du
Silver Hills at Universal	MPL2019-10046	5885 Lakehurst Drive	540 du
4919 W. Colonial Drive	ZON2019-10020	4919 W. Colonial Drive	216 du
Dezerland	MPL2019-10002	5200 & 5250 International Drive	365 du
Beltway Commerce Center H-3 Industrial Warehouse	MPL2019-10052	S of Young Pine Dr., SE of Lee Vista Blvd.	108,000 sq. ft. warehouse
Church Street Phases 2 & 3	MPL2019-10056	333 & 225 S. Garland Avenue	209 room hotel, 19 du, 2,500 sq. ft. retail, 210,500 sq. ft. office
Acquasol	ZON2019-10021 MPL2019-10057	5001 Vanguard Street	510 du, 300 room hotel, 90,000 sq. ft. retail
DXV Central	ZON2019-10023	503, 509, & 515 W. Central Blvd.	71,982 sq. ft. office, 7,500 sq. ft. retail, 189 du
Judge Business Center	MPL2019-10063	6151 Conway Road	79,000 sq. ft. industrial
Hoffner Avenue Apartments	MPL2019-10067	5001,5051, 5053, 5121, & 5147 Hoffner Avenue	348 du
Grant Street Mixed Use	CUP2019-10031	215 W. Grant Street	109,700 sq. ft. retail
Sports & Entertainment District	ZON2019-10028 MPL2019-10086	E of S. Division Ave., S of W. Central Blvd., W of S. Hughey Ave., & N of W. Church Street	420,000 sq. ft. office, 300 room hotel
Narcoossee Cove I Multifamily	MPL2018-10092	E of Narcoossee Rd., N of William Carey Dr., S of Kirby Smith Rd., & W of Lake Whippoorwill	354 du
Lake Nona Mixed Use Block 2A Multifamily	MPL2018-10090	S of Nemours Pkwy., E of Lake Nona Blvd., & N of Tavistock Lakes Blvd.	450 du 9,019 sq. ft. retail
Lake Nona Parcel 10 Resort	MPL2018-10091	S of Lake Nona, N of Wellspring Dr., & E of USTA Blvd.	375 room hotel

East Park Village Center 2	MPL2018-10104	N of Moss Park Rd., W of SR 417, E of Winding Way Blvd.	264 du, 250 room hotel 75,000 sq. ft. medical office, 19,000 sq. ft. retail
Lake Nona Town Center Phase 2A	MPL2019-10011	S of SR 417, NW of Lake Nona Blvd., & E of Boggy Creek Rd	1,575,137 sq. ft. non-residential, 238 room hotel
Southeastern Oaks Townhomes	MPL2019-10015	E of Narcoossee Rd, S of Clapp Simms Duda Rd., N of Osceola County line, & W of Split Oak Forest	168 du
Poitras East N-5 South	MPL2019-10027	S of Laureate Blvd., W of Narcoossee Rd., E of Selten Way	119,966 sq. ft. of commercial & office
Nona Village Center Hotel	MPL2019-10028	W of Narcoossee Rd, N of SR 417, S of Lake Nona Blvd	138,421 sq. ft./250 room hotel
Southeastern Oaks Phase II	MPL2019-10043	E of Narcoossee Rd, S of Clapp Simms Duda Rd, and N of Osceola County line	195 du
Pioneers Multi-family	MPL2019-10051	N of Weller Blvd, E of Narcoossee Road, S of William Carey Drive, W of Lake Whippoorwill	300 du
Laureate Park Phase 6 Townhomes	MPL2019-10058	N of Tavistock Lakes Blvd, W of Narcoossee Rd, S of Nemours Pkwy	150 du
Poitras East N-4	MPL2019-10059	W of Narcoossee Rd, N of Boggy Creek Rd, S of Laureate Blvd	124 du
Modera at Creative Village	MPL2019-10007	600 W. Amelia Street	292 du & 10,000 sq. ft. retail
Creative Village Parcel T/T-1	MPL2019-10070	N of W. Amelia St., W of Ronald Blocker Ave., & S of W. Concord St.	175,940 sq. ft. office

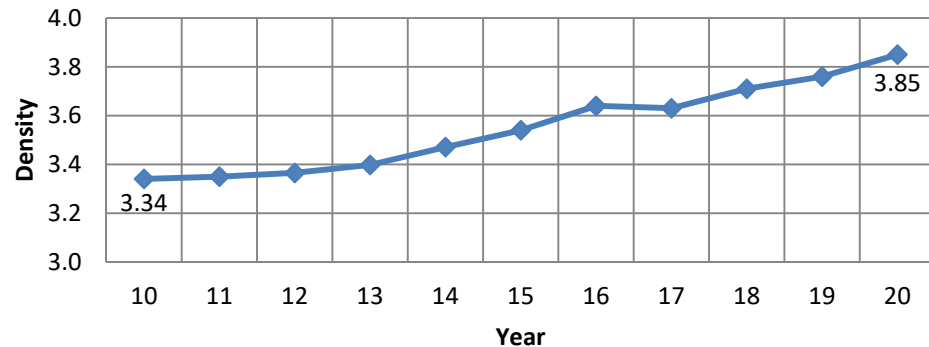


## B. SMART GROWTH INDICATORS

### 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 6,747 persons since last year and 54,317 in the last 10 years. City land area has increased 5.69 acres since last year and 4,766 acres in the last 10 years.<sup>1</sup>

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

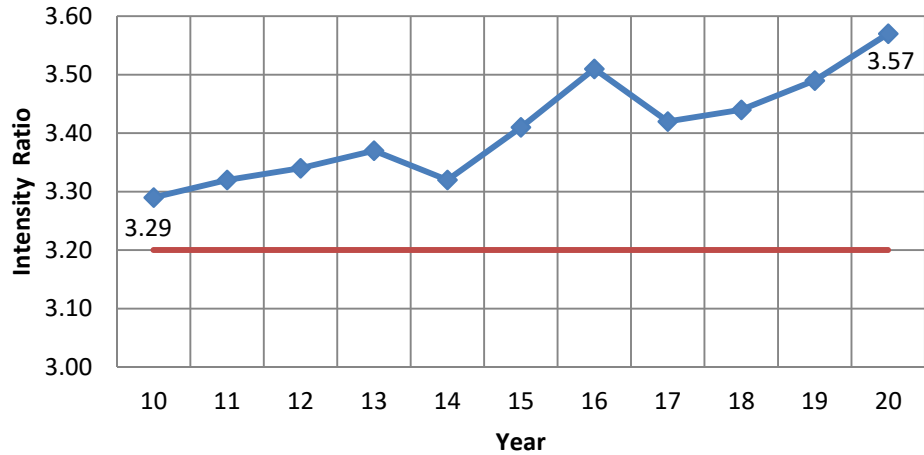
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<sup>1</sup> Note: Acres of land in the City on January 1, 2020 was calculated as acres of land in the City on January 1, 2019 (75,900) plus acres of land annexed in 2019 (5.69). The result (75,906) is higher than the acreage calculated using the City GIS system (75,814), but the result is a more accurate indicator of change since last year. The GIS figure is slightly different because the City boundary layer has become more accurate over the years through continuous mapping and technology improvements.

## 2. EMPLOYMENT DENSITY

### A) JOBS PER ACRE

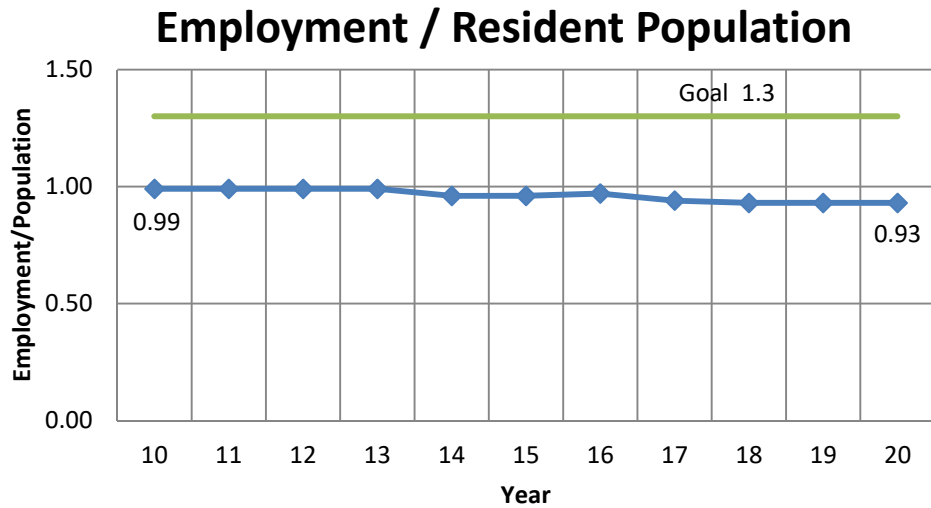
#### Jobs / Acres of City Land Area



<b>3.2</b>	<b>3.29</b>	<b>3.57</b>	<b>Yes</b>
Goal	2010	2020	Achieved?

Non-Residential Intensity is measured as jobs per acre of City land area. The City gained 5,866 jobs since last year and has gained 36,770 jobs since 2010. The City land area has increased by 5.69 acres since last year and 4,766 acres in the last 10 years. This data indicates the non-residential intensity in the City increased by 0.08% since last year. The current ratio of 3.57 exceeds the City's goal to increase the ratio from 3.07 to 3.2 by 2009. Staff will evaluate creating a new goal for future annual reports.

**B) JOBS TO HOUSING RATIO**



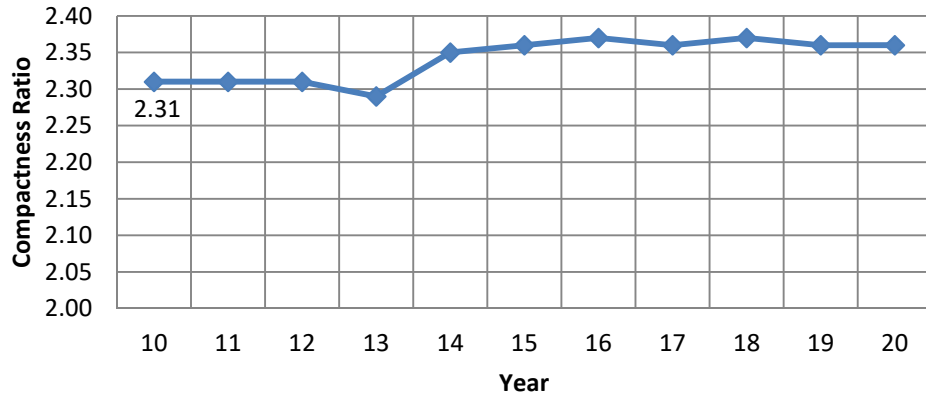
<b>1.02 - 1.3</b>	<b>1.02</b>	<b>0.93</b>	<b>No</b>
Goal	Baseline	2020	Achieved?

Jobs/Housing Balance is measured as a ratio of employment over resident population. The City added 5,866 jobs since last year and added 36,770 jobs since 2010. The resident population increased by 6,747 persons since last year and 54,317 persons in the last 10 years. Based on these figures, the City’s jobs/housing balance ratio remained the same since last year. It’s also possible that more people are working from home, which is not captured in the data. Given strong population growth over the last year, it is expected that job growth will gain momentum over the next year as well. The current ratio of 0.93 is just outside the City’s target range of 1.02 to 1.3.

### 3. COMPACTNESS

#### A) CITY BOUNDARY

### Miles of City Boundary / Square Miles of City Land Area



↓	<b>2.31</b>	<b>2.36</b>	<b>No</b>
Goal	2010	2020	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 5.69 acres during the past year. The City boundary in miles remains the same 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

<b>Maintain Mix of Land Uses Within Urban and Metropolitan Activity Centers</b>			
<b>Res.</b>	<b>15 - 30%</b>	<b>14%</b>	<b>No</b>
<b>Office</b>	<b>10 - 25%</b>	<b>9%</b>	<b>No</b>
<b>Com.</b>	<b>30 - 50%</b>	<b>52%</b>	<b>No</b>
<b>PRI</b>	<b>5 - 20%</b>	<b>11%</b>	<b>Yes</b>
<b>Hosp.</b>	<b>1 - 10%</b>	<b>4%</b>	<b>Yes</b>
<b>Ind.</b>	<b>5 - 10%</b>	<b>10%</b>	<b>Yes</b>
<b>Use</b>	<b>GMP Goal</b>	<b>2019</b>	<b>Achieved?</b>

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

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

- GMP Future Land Use Element Objective 2.2

<b>Maintain Mix of Land Uses Within Mixed Use Corridors</b>			
<b>Res.</b>	<b>10 - 20%</b>	<b>18%</b>	<b>Yes</b>
<b>Office</b>	<b>10 - 15%</b>	<b>31%</b>	<b>No</b>
<b>Com.</b>	<b>30 - 55%</b>	<b>31%</b>	<b>Yes</b>
<b>PRI</b>	<b>5 - 20%</b>	<b>6%</b>	<b>Yes</b>
<b>Hosp.</b>	<b>1 - 8%</b>	<b>1%</b>	<b>Yes</b>
<b>Ind.</b>	<b>5 - 15%</b>	<b>13%</b>	<b>Yes</b>
<b>Use</b>	<b>GMP Goal</b>	<b>2019</b>	<b>Achieved?</b>

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

In 2019, the mix of uses within Urban and Metropolitan Activity Centers fell within the target range for hospital, public and industrial. The percentage of residential use and office was about 1% under the target range for 2045. This result is not considered undesirable because the 2025 goal range for residential has been 10% to 25%. The percentage of commercial use was about 2% over the target range. This is still on track to meet the goal in the future.

The Mixed Use Corridor indicator has been reviewed to determine if it meets the target ranges. In 2019, the mix of uses within Mixed Use Corridors fell within the target range for all segments, residential, commercial, public, hospital and industrial. The percentage of office use was about 16% over the target range. Last year, the Mixed Use Corridor office indicator was 33%, therefore it has decreased by 2%. During the review of the 2016 Evaluation & Appraisal Report, the City's goal for office was reduced from the 2025 goal of 25% to 50% to the 2045 goal of 10% to 15%. This indicator will continued to be monitored to determine if the Mixed Use Corridor office goal will need to be revised.

## 5. TRANSIT ACCESS

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

	Population within ¼ mile of Transit Corridor	Percentage of Total Population	Employment within ¼ mile of Transit Corridor	Percentage of Total Employment
Existing Corridors	134,186	46%	141,450	52%
Future Corridors	19,758	7%	25,312	9%

The total City population is 291,957. Approximately 53% live within ¼ mile of an existing or future transit corridor. The total employment is 270,846. Approximately 61% of employment centers are within ¼ mile of an existing or future transit corridor.

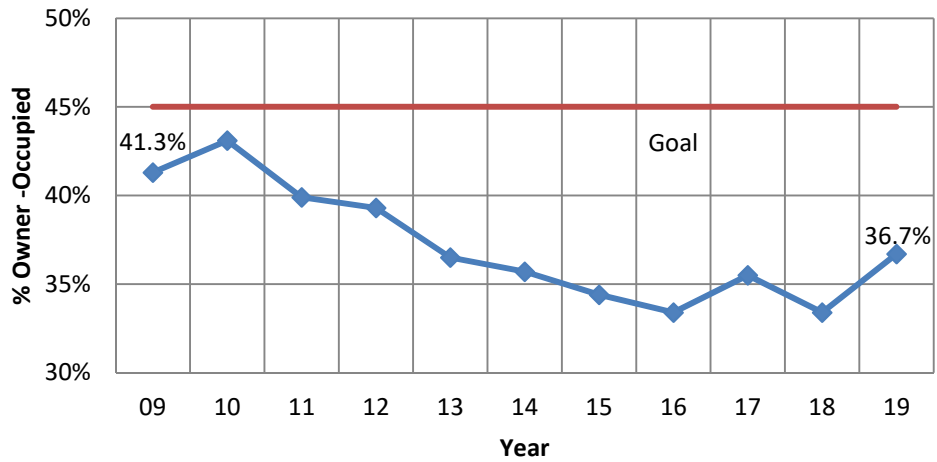
## C. HOUSING INDICATORS

### 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 43,102 units and the number of multi-family is 94,793 units. The percentage of existing multi-family units is 69%. The annual growth rate of multi-family is 0.4%. This growth can be attributed to the City's growing employment base.

## 2. HOUSING TENURE

### Owner-Occupied Dwelling Units



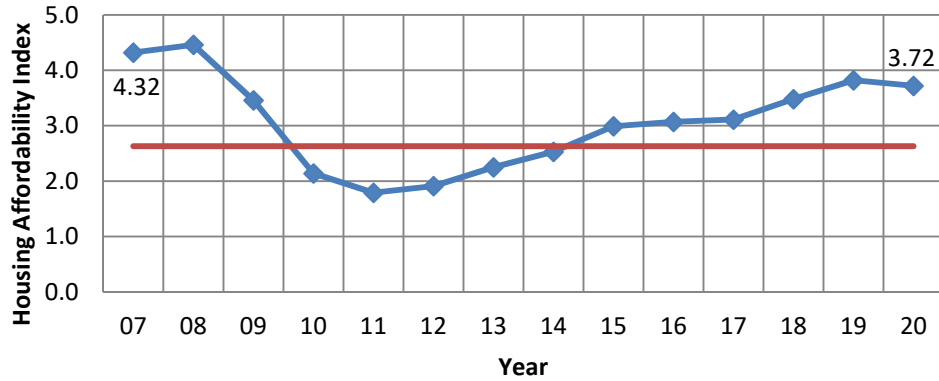
<b>45%</b>	<b>41.3%</b>	<b>36.7%</b>	<b>No</b>
Goal	2009	2019	Achieved?

According to the City Land Use Database there are 137,895 housing units in the City of Orlando at the end of 2019, of which 43,102 are single family units and 94,793 are multifamily units. In an effort to align pertinent housing data with City of Orlando Housing and Community Development household and household cost burden data, additional housing information was drawn from the 2018 ACS (American Community Survey) sources. This data is one year older than City data, therefore results are shown through the beginning of 2019 (reported as 2018 ACS). According to 2018 ACS data for the City of Orlando, there are a reported 137,280 housing units, of which 114,176 (83.2%) are occupied and 23,104 (16.8%) are vacant. Of the occupied units, 41,860 (36.7%) are owner-occupied and 72,316 (63.3%) are renter-occupied. The percentage of owner-occupied units has increased by 3.3% since last year, and is below the 2009 reported rate of 41.3% and the ten year goal of 45%.



### 3. AFFORDABLE HOUSING

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



Median Home Sales Price / Average Household Income for Family of Four			
<b>&lt;2.63</b>	<b>2.86</b>	<b>3.72</b>	<b>No</b>
Goal	Baseline	2020	Achieved?

Information concerning home prices was obtained from the Orlando Regional Realtor Association for the 4-county Orlando Metropolitan Area (Orange, Seminole, Osceola and Lake counties).<sup>2</sup> Information concerning median income was obtained from the U.S. Department of Housing & Urban Development.<sup>3</sup> According to a report from the Orlando Regional Realtor Association, the median sales price for homes in Metropolitan Orlando in 2019 was \$242,000. This figure is \$17,000 more than last year and \$6,000 less than the peak reported in January 2007. The median income for a family of four in Orange County increased from \$58,976 in 2018 to \$65,118 in 2019. This figure has increased by \$6,142 since last year and is a \$7,718 increase since 2007.

The City’s housing affordability goal is a ratio of 2.63. The City’s actual ratio for 2019 was 3.82 and as of January 1, 2020 it is 3.72. This figure is 0.10 less than last year, but is 0.60 below the 2007 baseline of 4.32. Housing prices are increasing, and affordability is a concern now and could be a greater concern in the near future.

<sup>2</sup> Orlando Regional Realtor Association, Metropolitan Orlando Market Overview, 2019 Statistics at a Glance, January 8, 2020, <https://www.orlandorealtors.org/marketreports>

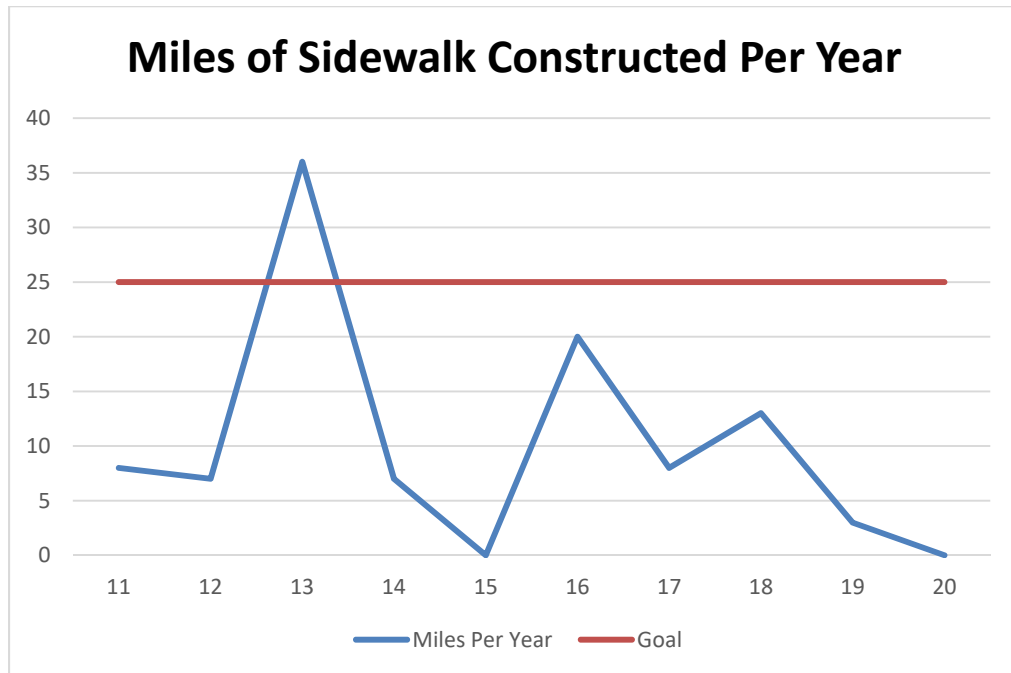
<sup>3</sup> U.S. Department of Housing and Urban Development, FY2019 Median Family Income Documentation System, Orlando-Kissimmee, FL MSA Results. <https://www.huduser.gov/portal/datasets/il/il2019/2019MedCalc.odn>

## 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



<b>+25/yr</b>	<b>0</b>	<b>No</b>
Goal	2019	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:

- 826 miles on January 11, 2011
- 946 miles on January 20, 2012
- 961 miles on August 1, 2013
- 961 miles on August 1, 2014
- 981 miles on August 1, 2015
- 989 miles on August 1, 2016
- 1,002 miles on August 1, 2017
- 1,005 miles on August 1, 2018
- 1,005 miles on August 1, 2019

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 no new miles of sidewalks were constructed by Public Works during 2019. Additional sidewalk was constructed by developers in residential subdivisions, but the City’s sidewalk GIS layer has not been updated to reflect this. Given the number of new streets in Storey Park and Laureate Park, and the code requirement to include sidewalks on both sides of each new street, it’s possible this goal has been met. The City will continue to update its GIS layer to reflect new development.

**B) BIKEWAY FACILITIES**

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

The City of Orlando currently has 364.22 miles of bikeways. This in an increase of 0.7 miles since last year, and an increase of 84.1 miles since 2012. In 2019, bikeways include:

Bike Paths:	43.09 miles
Bike Lanes:	267.76 miles
<u>Signed Routes:</u>	<u>53.37 miles</u>
<b>TOTAL:</b>	<b>364.22 miles</b>

**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 156.5 miles of designated Transit Corridors and 110.3 miles or 70% of those corridors currently have LYNX service available for some portion of a typical day.

Sunrail, a commuter train that is a 49 miles long and has 16 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) WALKSCORE**

Walk Score is a website that measures the walkability of any address based on the distance to nearby places and pedestrian friendliness. Orlando has a Walk Score of 41 out of 100 which means that people are car-dependent. Most errands require a car. This score has remained the same since last year. There are some individual neighborhoods that have a higher Walk Score. These neighborhoods are South Eola, Central Business District, and Thornton Park. South Eola has a Walk Score of 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 it is very walkable and most errands can be accomplished on foot. The Walk Score for Orlando is based on weighted average of scores of many addresses in the City and is available from walkscore.com.

## **B) BIKESCORE**

Bike Score measures whether an area is good for biking based on bike lanes and trails, hills, road connectivity, and destinations. Orlando has a Bike Score of 60 out of 100 which is considered to be bikeable, there is some bike infrastructure. This score has risen 5 points since last year. The three neighborhoods with the highest Bike Scores in the City are Lake Eola Heights (85), Park Lake – Highland (84), and Callahan (84). These neighborhoods are considered very bikable which means that biking is convenient for most trips. The Bike Score for Orlando is based on weighted average of scores of many addresses in the City and is available from walkscore.com.

## **3. VEHICLE MILES TRAVELED**

Vehicle miles traveled is defined as a measurement of miles traveled by vehicles in a specified region for a specified time period. According to the Florida Department of Transportation, as of January 1, 2019, the vehicles miles traveled in Orange County was 42,527,605. This is an increase from last year by 775,521 or 1.8%.

## **4. MODE CHOICE**

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

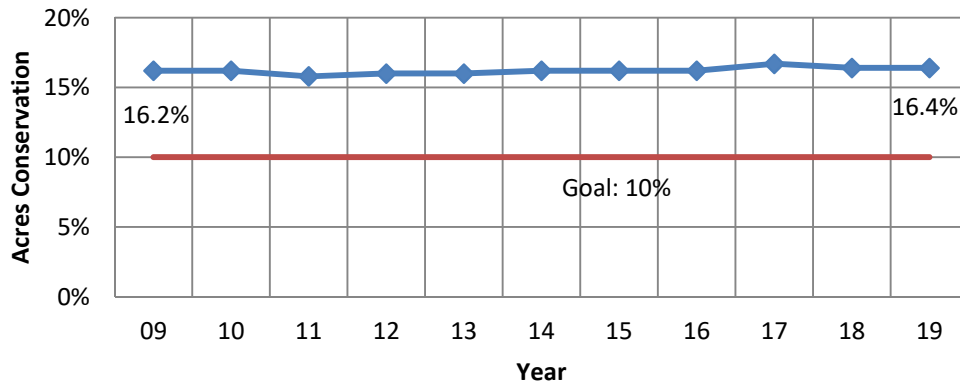
According to 2018 ACS data for the City of Orlando, of the 159,006 workers that travel to work, 82.2% drive a vehicle alone, 8.4% carpool, 2.8% use transit, 1.2% walk to work and 3.6% work from home. Those that chose to use transit decreased by 1.5% from the previous year.

## E. ENVIRONMENTAL INDICATORS

### 1. CONSERVATION ACREAGE

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

### Acres of Conservation in City / Total Acres in City



<b>10%</b>	<b>10.8%</b>	<b>16.4%</b>	<b>Yes</b>
Goal	Baseline	2019	Achieved?

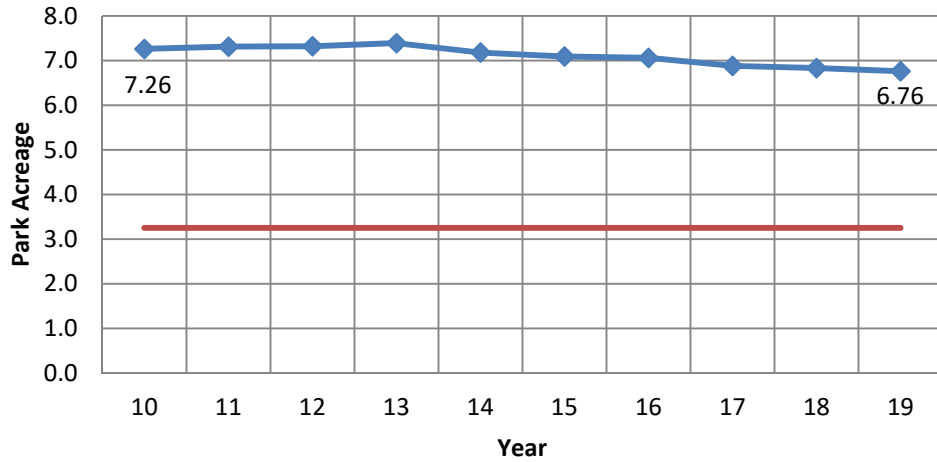
There is currently no accurate way to estimate all open space inside City limits. Open space may occur in any zoning district, may be publicly or privately owned, and may or may not be protected from future development. The next best option is to identify the amount of land that is designated as Conservation 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 6 acres during the past year. Conservation acreage is calculated using future land use designations rather than zoning. The amount of Conservation area in the City has decreased 8 acres since last year. This decrease is due to future land use changes which revised some Conservation areas for Southeast Orlando due to more accurate mapping. Based on these figures, 16.4% of the City land area is Conservation. This figure exceeds the City’s goal of at least 10% Conservation use.

## 2. PARK ACREAGE

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

### Park Acreage/ Population

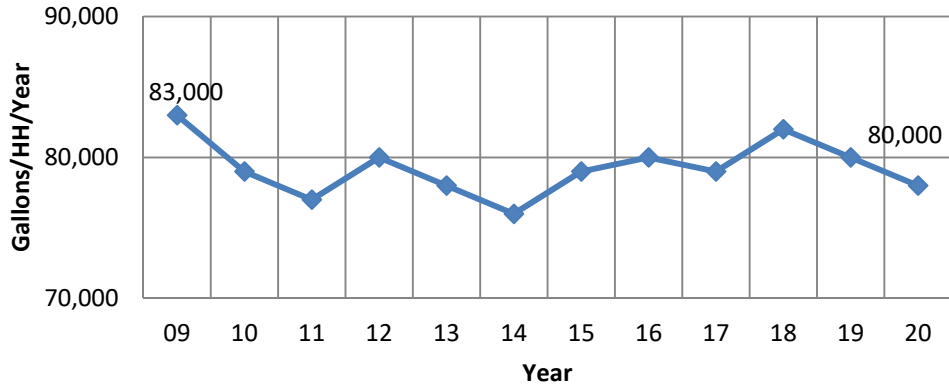


Parks level of service is measured as a ratio of acreage over resident population. The City has 1,988 acres of parks and added 262 acres since 2010. The resident population increased by 6,747 persons since last year and 54,317 persons since 2010. Based on these figures, the City's parks ratio is above the required LOS by 3.51 acres per thousand population. There is currently a surplus of 1,049 acres citywide. Most of the growth in park acreage can be accounted for the Lake Nona area where two new community parks – Heroes Community Park and McCoy Community Park – were developed, along with additional bike trails along Nemours Parkway and Dowden Road, and small neighborhood parks and greens both in Lake Nona's Laureate Park and in the rapidly growing Storey Park.

### 3. WATER & ENERGY CONSUMPTION

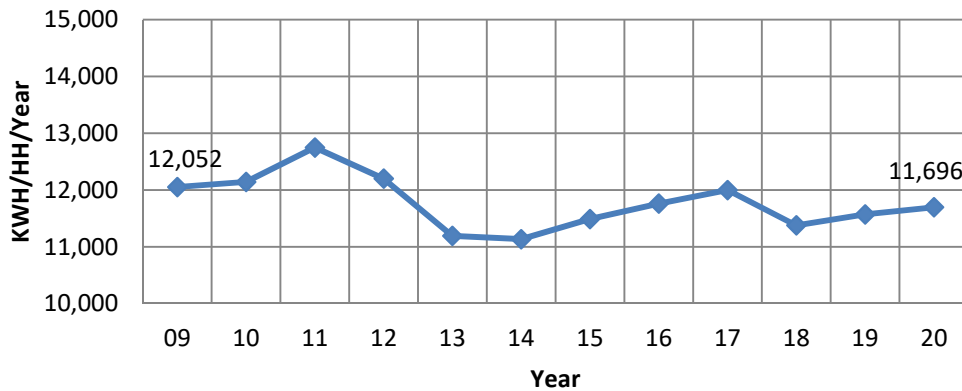
“The City shall reduce total per household potable water demand by an additional 3 percent between 2017 and 2020, and an additional 4 percent by 2040, from a baseline in 2017 of 79,000 gallons per household per year.” - GMP Potable Water Element Objective 1.2.

#### Annual Average Residential Water Consumption



↓	<b>79,000</b>	<b>78,000</b>	<b>No</b>
Goal	2017 Baseline	2020	Achieved?

#### Annual Average Residential Electric Consumption



↓	<b>12,301</b>	<b>11,696</b>	<b>No</b>
Goal	Baseline	2020	Achieved?

Water and electric consumption figures were obtained from Orlando Utilities Commission (OUC). Current data indicates that per household water consumption decreased by 2,000 gallons or 2.5% when compared to last year and decreased by 1.3% when compared to the 2009 condition. Data also indicates that energy consumption has increased by 1.1% when compared to last year and decreased by 3.7% when compared to the baseline condition.

## **F. Looking Back and Looking Ahead**

Data collected over the last ten years show progress toward meeting many goals. As of 2020, the City of Orlando:

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

Major planning accomplishments in 2019 included:

- Traditional City Activity Center and Mixed Use Corridor District LDC Amendments
- International Drive Special Plan Overlay Update
- Tree Preservation LDC Updates
- SODO Development Standards & Design Guidelines
- Land Development Code Amendments for Sidewalk Requirements
- Curry Ford Vision Plan

In addition, the following specific activities will be addressed in 2020:

- Downtown FAR Amendments
- Medical Marijuana Dispensary LDC Amendments
- Livable Orlando – Age Friendly Initiative
- Future - Ready City

\* \* \*



**EXHIBIT 1**

**Baseline Conditions & Community Development Goals**

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2006	1/1/2007	1/1/2008	1/1/2009	1/1/2010	1/1/2011	1/1/2012	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	1/1/2019	1/1/2020	Change from Previous Year	Community Development Goal	
A1	Population Total		221,138	227,890	233,220	235,860	237,640	239,235	240,350	242,908	253,355	258,583	265,531	275,338	281,053	285,210	291,957	6,747	376,110 projected by 2045	
	Single Family Units												40,964	41,444	41,977	42,429	43,102	673		
	Multifamily Units												87,564	90,141	91,835	92,241	94,793	2,552		
A2	Employment Total		215,161	226,364	228,902	235,417	234,076	237,200	238,753	240,839	242,412	248,966	256,148	259,112	260,841	264,980	270,846	5,866	Increase	
	New Growth												95,124	143,170	168,675	299,854	334,906	35,052		
	Office sq. ft.												230,733	496,882	656,299	428,950	596,643	167,693		
	Retail sq. ft.												507	423	423	1,217	1,775	558		
	Hotel sq. ft.												1,461,909	641,035	272,541	557,834	2,314,369	1,756,535		
	Indust sq. ft.												1,641,654	-	18,019	19,468	-	(19,468)		
	Hospital sq. ft.												6,289	146,077	665,262	432,868	279,344	(153,524)		
	Civic sq. ft.																			
B1	Population density per sq mile	Population / Acres of City Land Area	221,138 / 70,280 = 3.15	227,890 / 70,528 = 3.23	233,220 / 71,090 = 3.28	235,860 / 71,137 = 3.32	237,640 / 71,140 = 3.34	239,235 / 71,422 = 3.35	240,350 / 71,425 = 3.37	242,908 / 71,489 = 3.40	253,355 / 72,990 = 3.47	258,583 / 73,042 = 3.54	265,531 / 73,045 = 3.64	275,338 / 75,842 = 3.63	281,053 / 75,861 = 3.71	285,210 / 75,900 = 3.76	291,957 / 75,906 = 3.85	6,747 / 6 = 1.12	Increase	
B2a	Non-Residential Intensity	Jobs / Acres of City Land Area	215,161 / 70,280 = 3.06	226,364 / 70,528 = 3.21	228,902 / 71,090 = 3.22	235,417 / 71,137 = 3.31	234,076 / 71,140 = 3.29	237,200 / 71,422 = 3.32	238,753 / 71,425 = 3.34	240,839 / 71,489 = 3.37	242,412 / 72,990 = 3.32	248,966 / 73,042 = 3.41	256,148 / 73,045 = 3.51	259,112 / 75,842 = 3.42	260,841 / 75,861 = 3.44	264,980 / 75,900 = 3.49	270,846 / 75,906 = 3.57	5,866 / 6 = 977.67	Increase	
B2b	Jobs/Housing Balance	Employment / Resident population	215,161 / 221,138 = 0.97	226,364 / 227,890 = 0.99	228,902 / 233,220 = 0.98	235,417 / 235,860 = 1.00	234,076 / 237,640 = 0.99	237,200 / 239,235 = 0.99	238,753 / 240,350 = 0.99	240,839 / 242,908 = 0.99	242,412 / 253,355 = 0.96	248,966 / 258,583 = 0.96	256,148 / 265,531 = 0.97	259,112 / 275,338 = 0.94	260,841 / 281,053 = 0.93	264,980 / 285,210 = 0.93	270,846 / 291,957 = 0.93	5,866 / 6,747 = 0.87	Maintain ratio between 1.0 and 1.3.	
B3a	Compactness	Miles of City boundary / Sq. Miles of City Land Area	247.4 / 109.8 = 2.25	249.7 / 110.2 = 2.27	256.6 / 111.1 = 2.31	257.2 / 111.2 = 2.31	256.9 / 111.2 = 2.31	257.55 / 111.6 = 2.31	257.60 / 111.6 = 2.31	256.13 / 111.7 = 2.29	268.00 / 114.0 = 2.35	269.71 / 114.1 = 2.36	270.00 / 114.0 = 2.37	279.88 / 118.4 = 2.36	279.36 / 118.0 = 2.37	279.95 / 118.5 = 2.36	279.95 / 118.5 = 2.36	0.00 / 0.0 = 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	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019			
		Residential	9%	13%	11%	11%	12%	11%	12%	14%	14%	13%	14%	13%	14%	14%	14%	14%	0%	2045 Min. 15%
		Office	10%	8%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	9%	-1%	2045 Max. 30%
		Commercial	52%	54%	50%	52%	50%	52%	50%	50%	50%	51%	50%	50%	50%	51%	52%	51%	1%	10% 25%
		Public, Recreational, Institutional	11%	9%	11%	10%	10%	12%	10%	11%	11%	11%	11%	11%	11%	11%	11%	11%	0%	30% 50%
		Hospital	6%	6%	6%	8%	4%	4%	4%	4%	5%	5%	5%	5%	4%	4%	4%	4%	0%	5% 20%
		Industrial	12%	10%	12%	11%	12%	12%	12%	11%	11%	10%	10%	11%	11%	10%	10%	10%	0%	1% 10%
		TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	5% 10%
	Mixed-use development.	Maintain mix of land uses within Mixed Use Corridor, as provided in GMP Objective 2.2	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019			
		Residential													17%	16%	16%	18%	2%	2045 Min. 10%
		Office													33%	33%	33%	31%	-2%	2045 Max. 20%
		Commercial													31%	32%	31%	31%	0%	10% 15%
		Public, Recreational, Institutional													6%	6%	6%	6%	0%	30% 55%
		Hospital													2%	2%	2%	1%	0%	5% 20%
		Industrial													11%	11%	12%	13%	-1%	1% 8%
		TOTAL													100%	100%	100%	100%	1%	5% 15%
B5	Transit Access	Population within 1/4 mile of Transit Corridor										116,883	117,614	95,030	88,411	Note: Data updated with Transit Corridor update	153,944	65,533	Increase	
		Employment within 1/4 mile of Transit Corridor										154,053	155,403	94,664	78,227		166,762	88,535		
C1	Housing Mix	Percent multifamily (existing)									67.79%	67.97%	68.13%	68.50%	68.63%	68.49%	68.74%		Monitor trends	
		Percent multifamily (annual growth)											1.9%	2.9%	1.9%	-0.2%	0.4%	0.25%		
C2	Housing Tenure	Owner-Occupied / Total Occupied = % Owner-Occupied	39,977 / 96,947 = 41.2%	41,166 / 99,612 = 41.3%	41,626 / 100,568 = 41.4%	42,210 / 102,204 = 41.3%	42,272 / 98,146 = 43.1%	38,569 / 96,753 = 39.9%	38,479 / 97,918 = 39.3%	37,425 / 102,564 = 36.5%	36,986 / 103,466 = 35.7%	37,733 / 109,685 = 34.4%	37,094 / 111,100 = 33.4%	38,542 / 108,523 = 35.5%	35,916 / 107,590 = 33.4%	41,860 / 114,176 = 36.7%	Not yet available	3.3%	Increase	
		Renter-Occupied / Total Occupied = % Renter-Occupied	56,970 / 96,947 = 58.8%	58,446 / 99,612 = 58.7%	58,942 / 100,568 = 58.6%	59,994 / 102,204 = 58.7%	55,874 / 98,146 = 60.1%	58,184 / 96,753 = 60.1%	59,439 / 97,918 = 60.7%	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%	Not yet available	-3.3%		
C3	Affordable Housing Ownership	Median home sales price / Average household income for family of four	\$239,900 / \$55,100 = 4.35	\$248,000 / \$57,400 = 4.32	\$245,000 / \$54,900 = 4.46	\$205,000 / \$59,200 = 3.46	\$130,000 / \$60,700 = 2.14	\$109,000 / \$60,900 = 1.79	\$109,900 / \$57,400 = 1.91	\$129,000 / \$57,400 = 2.25	\$148,000 / \$58,500 = 2.53	\$164,000 / \$54,800 = 2.99	\$178,788 / \$58,300 = 3.07	\$180,000 / \$57,800 = 3.11	\$203,000 / \$58,400 = 3.48	\$225,000 / \$58,976 = 3.82	\$242,000 / \$65,118 = 3.72	\$17,000 / \$6,142 = 2.77	Maintain ratio less than 2.7	
D1a	Pedestrian Access	Miles of sidewalk	August 2005:	August 2006:	August 2007:	September 2008:	January 21, 2010:	January 11, 2011	January 20, 2012	Aug. 1, 2012 (CAR)	Aug. 1, 2013 (CAR)	Aug. 1, 2014 (CAR)	Aug. 1, 2015 (CAR)	Aug. 1, 2016 (CAR)	Aug. 1, 2017 (CAR)	Aug. 1, 2018 (CAR)	Aug. 1, 2019 (CAR)		Add 4 miles per year.	

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2006	1/1/2007	1/1/2008	1/1/2009	1/1/2010	1/1/2011	1/1/2012	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	1/1/2019	1/1/2020	Change from Previous Year	Community Development Goal
			560	578.1	592	599	818	826	946	947	961	961	981	989	1002	1005	1005	0	
							Note: Change from previous year reflects 2009 sidewalk inventory.		Note: Change from previous year reflects 2011 sidewalk inventory.										
D1b	Miles of bike infrastructure								280.1	293.2	317.6	317.6	322.4	338.8	361.5	363.5	364.2	0.7	Build 20 miles between 2010 and 2014.
D1c	Miles of Transit Corridors								155.8	155.8	155.8	155.8	155.8	155.8	156.5	156.5	156.5	0	Increase
D2a	Walkscore											39	39	41	42	42	41	1	Increase
D2b	Bikescore											52	53	53	53	55	60	5	Increase
D3	VMT (County) per person per day			34,663,274	36,029,040	35,436,426	35,586,328	35,657,527	33,325,315	34,099,958	34,904,854	36,389,540	37,201,259	39,723,296	41,752,084	42,527,605	Not yet available	1.8%	Decrease
D4	Work commute Mode split						Drive Alone 78.1%, Carpool 9.7%, Transit 4.9%, Walk 1.8%, Other 2.0%, Work Home 3.5%	Drive Alone 77.3%, Carpool 11.3%, Transit 3.1%, Walk 1.4%, Other 2.2%, Work Home 4.7%	Drive Alone 79.4%, Carpool 7%, Transit 6.3%, Walk 2.7%, Other 1.9%, Work Home 2.8%	Drive Alone 79.3%, Carpool 8.6%, Transit 5%, Walk 1.8%, Other 2.2%, Work Home 3.1%	Drive Alone 79%, Carpool 8%, Transit 4.6%, Walk 1.9%, Other 2%, Work Home 4.5%	Drive Alone 77.3%, Carpool 10.6%, Transit 3.9%, Walk 1.6%, Other 1.6%, Work Home 5%	Drive Alone 79.6%, Carpool 6.6%, Transit 5.3%, Walk 1.3%, Other 2.3%, Work Home 4.9%	Drive Alone 79.1%, Carpool 8.2%, Transit 4.5%, Walk 1.8%, Other 1.9%, Work Home 4.5%	Drive Alone 76.0%, Carpool 7.8%, Transit 4.3%, Walk 2.7%, Other 3.2%, Work Home 6.0%	Drive Alone 82.2%, Carpool 8.4%, Transit 2.8%, Walk 1.2%, Other 1.7%, Work Home 3.6%	Not yet available	Drive Alone +6.2%, Carpool +0.6%, Transit -1.5%, Walk -1.5%, Other -1.5%, Work Home -2.4%	Transit 5% or more
E1	Conservation	Acres of Conservation in City / Total acres in City	7,755 70,280 11.0%	10,645 70,528 15.1%	11,258 71,090 15.8%	11,549 71,137 16.2%	11,499 71,140 16.2%	11,254 71,422 15.8%	11,408 71,425 16.0%	11,405 71,489 16.0%	11,797 72,990 16.2%	11,854 73,042 16.2%	11,854 73,045 16.2%	12,687 75,842 16.7%	12,441 75,861 16.4%	12,427 75,900 16.4%	12,419 75,906 16.4%	(8) 6 0.0%	20% open space, of which at least 10% conservation.
E2	Parks	Acres of Parks in City / Population					1,726 237,640 7.26%	1,749 239,235 7.31%	1,760 240,350 7.32%	1,795 242,908 7.39%	1,818 253,355 7.18%	1,833 258,583 7.09%	1,875 265,531 7.06%	1,893 275,338 6.88%	1,919 281,053 6.83%	1,929 285,210 6.76%	1,988 291,957 6.81%	59 6,747 0.05%	At least 3.25 acres per 1,000 population.
E3b	Per household water consumption	Annual average residential water consumption (per household) in gallons per year.	141,000	140,000	118,000	83,000	79,000	77,000	80,000	78,000	76,000	79,000	80,000	79,000	82,000	80,000	78,000	-2,000	Decrease
		Data is system wide (not City-specific).	as of September 30, 2005*	as of September 30, 2006*	as of September 30, 2007*	as of September 30, 2008*	as of September 30, 2009*	as of September 30, 2010*	as of September 30, 2011*	as of September 30, 2012*	as of September 30, 2013*	as of September 30, 2014*	as of September 30, 2015*	as of September 30, 2016*	as of September 30, 2017*	as of September 30, 2018*	as of September 30, 2019*	-2.5%	
E3b	Per household energy consumption	Annual average residential electric consumption (per household) in KWH.	13,058	12,908	12,301	12,052	12,143	12,748	12,200	11,192	11,134	11,488	11,760	11,999	11,378	11,570	11,696	126	Decrease
		Data is system wide (not City-specific).	as of September 30, 2005*	as of September 30, 2006*	as of September 30, 2007*	as of September 30, 2008*	as of September 30, 2009*	as of September 30, 2010*	as of September 30, 2011*	as of September 30, 2012*	as of September 30, 2013*	as of September 30, 2014*	as of September 30, 2015*	as of September 30, 2016*	as of September 30, 2017*	as of September 30, 2018*	as of September 30, 2019*	1.1%	

Source: City of Orlando Economic Development Department, City Planning Division March 2020