
GROWTH MANAGEMENT PLAN INDICATORS

2021 ANNUAL REPORT

(January 1, 2021– December 31, 2021)

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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

2021 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 2021

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 2021, population is 319,722, and it grew by 20,844 since last year. The previous year-end (2020) estimate of 298,878 was about 3% low in comparison to the April 1, 2020 U.S. Census.

New development consists of:

- 517 single family units
- 2,577 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 2021, employment is 275,393.

New development consists of:

- 244,657 sq. ft. commercial

- 227,252 sq. ft. office
- 48 hotel rooms
- 604,895 sq. ft. industrial
- 24,386 sq. ft. hospital
- 102,843 sq. ft. civic

3. PROJECTS COMPLETED

The following large-scale projects received a certificate of occupancy during calendar year 2021. 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	
Camden Lake Eola	BLD2016-04081	520 E. Church Street	364 du & 20,126 sq. ft. retail	
Lakehouse	BLD2018-15304	295 N. Ivanhoe Blvd	252 du 34,902 sq. ft. office & 2,563 sq. ft. retail	
Rise/West Vue	BLD2019-11665	6003 Raleigh Street	66 du	392 du
	BLD2019-11666	5981 Raleigh Street	130 du	
	BLD2019-11667	5955 Raleigh Street	66 du	
	BLD2019-11668	5937 Raleigh Street	130 du	
Altaire @ Millenia	BLD2019-11024	5404 Millenia Lakes Blvd	34 du	330 du
	BLD2019-11968	5408 Millenia Lakes Blvd	34 du	
	BLD2019-11972	5440 Millenia Lakes Blvd	34 du	
	BLD2019-11973	5448 Millenia Lakes Blvd	57 du	
	BLD2019-11969	5412 Millenia Lakes Blvd	57 du	
	BLD2019-11971	5432 Millenia Lakes Blvd	114 du	
Bainbridge @ Narcoossee Cove	BLD2019-13732	12021 Pioneers Way	84 du	354 du
	BLD2019-13733	12049 Pioneers Way	184 du	
	BLD2019-13734	12077 Pioneers Way	76 du	
	BLD2019-13735	12069 Pioneers Way	5 du	
	BLD2019-13736	12083 Pioneers Way	5 du	
Alexan North End	BLD2019-14228	741 Clay Street	109 du	222 du
	BLD2019-14229	1860 Oglesby Avenue	25 du	
	BLD2019-14230		40 du	
	BLD2019-14231		48 du	

Lake Nona Center for Well-Being	BLD2019-12991	6714 Tavistock Lakes Blvd	129,261 sq. ft. medical office
EA Sports HQ Creative Village	BLD2019-21662	515 W. Amelia Street	172,623 sq. ft. office
Hilton Garden Inn	BLD2019-10445	401 N. Magnolia Avenue	224 hotel rooms 1,782 sq. ft. office 7,536 sq. ft. retail
Airport Distribution Center North	BLD2020-17850	6851 Conway Road	103,312 sq. ft. industrial
Axxess Park @ 33rd	BLD2020-17353	3200 President Barack Obama Pkwy	207,993 sq. ft. industrial
	BLD2020-17354	3224 President Barack Obama Pkwy	117,351 sq. ft. industrial
	BLD2020-17355	3212 President Barack Obama Pkwy	126,137 sq. ft. industrial

4. PROJECTS APPROVED

The following large-scale projects received approval by the Municipal Planning Board, the Southeast Town Design Review Committee, South Downtown Town Design Review Committee, Baldwin Park Town Design Review Committee or the Creative Village Development Review Committee during calendar year 2021. 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
District West Apts.	MPL2020-10085	3399 WD Judge Road	247 du
401 S. Rosalind Ave. Apts.	MPL2020-10089	401 S. Rosalind Ave.	182 du
Encore Narcoossee Apts.	MPL2021-10001	7567 Narcoossee Road	252 du
Vista Commerce Park	MPL2021-10010	S of Lee Vista Blvd., E of SR 417 & SW of Young Pine Rd.	105,000 sq. ft. warehouse
Grand National	MPL2021-10013	6381 Adriana Avenue	349 du
S. Semoran Personal Storage	CUP2021-10008	2328 S. Semoran Blvd.	87,450 sq. ft. personal storage & 4,500 sq. ft. retail/office
Lake Highland Prep	MPL2021-10020	901 Highland Avenue	71,000 sq. ft. educational facility
Lee Vista Business Park	MPL2021-10028	4815 Judge Road	2.4 million sq. ft. industrial park
500 N. Orange Avenue Offices	MPL2021-10012	500 N. Orange Avenue	116,233 sq. ft. office

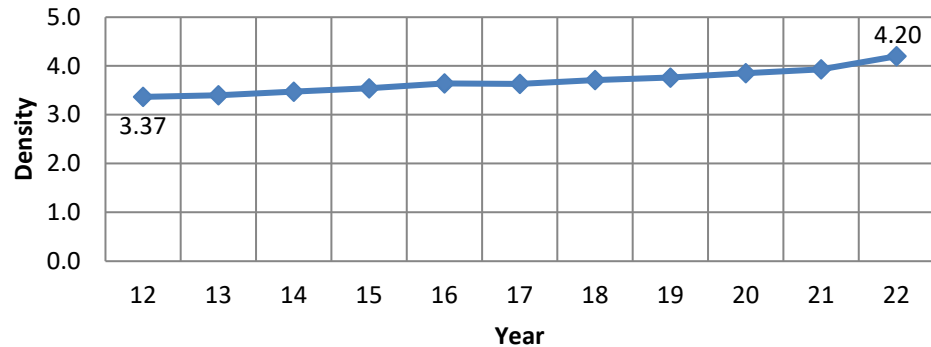
The Yard @ Brookhaven	ZON2021-10006	503 Brookhaven Drive	265 du & 24,100 sq. ft. retail/restaurant
2 nd Wave Apts.	ZON2021-10010	11809 Narcoossee Road	377 du 30,000 sq. ft. retail
International Drive Resort PD	ZON2021-10007	5001 Vanguard Street	340 du 100,000 sq. ft. retail 610 hotel rooms
Twelve Oaks Townhomes at Hoffner	MPL2021-10014	4989 Hoffner Avenue	166 du
8550 McCoy Road Warehouse	MPL2021-10043	8550 McCoy Road	262,000 sq. ft. warehouse
I-Drive Resort Multi-Family SPMP	MPL2021-10049	5001 Vanguard Street	308 du
International Festival Plaza	ZON2021-10019	6620 Grand National Dr.	1.8 million sq. ft. retail/office
Deseo Grande Apts.	MPL2021-10061	5200 International Drive	365 du
Fashion Square	MPL2021-10059	3201 E. Colonial Drive	1,400 du 177,000 sq. ft. retail 120 hotel rooms
3 rd Wave Multi-Family	MPL2021-10066	1900 & 2050 N. Orange Blossom Trail	293 du
Lion Gardens Apts.	ZON2021-10022	410 N. Orange Blossom Trail	306 du 2,000 sq. ft. retail
RoseArts	ZON2021-10008	S of Rosamond Dr., N and S of Lakebreeze Dr., N and E of South Lake Orlando Pkwy	5,650 du 350,000 sq. ft. non-residential
Lake Nona Parcel 15A Hotel	MPL2021-10033	12498 Approach Way	200 hotel rooms
Poitras N-2 Phase 1	MPL2021-10041	W of Pearson St., N of Boggy Creek Rd., S of Luminary Blvd.	200 du
Nona South Apts.	MPL2021-10025	E of Boggy Creek Rd., S of New Hope Rd., N of Beth Rd	364 du
Southeastern Oaks Phase 2	MPL2021-10045	11252 & 11328 Clapp Sims Duda Road	122 du
Lake Nona Parcel 9 Warehouse	MPL2020-10090	W of Lake Nona Blvd, N of Lake Nona Gateway Rd	90,000 sq. ft. warehouse
Prospect Gables Multi-Family	MPL2021-10046	1801 Prospect Avenue	230 du
Parcels X, X-1 & Y Mixed Use	MPL2021-10056	E of Chatham Ave., N of W Livingston St., S of Alexander Place & W of Hughey Ave.	326 du 185 hotel rooms 185,000 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 20,844 persons since last year and 79,372 in the last 10 years. City land area has increased 93 acres since last year and 4,688 acres in the last 10 years.¹

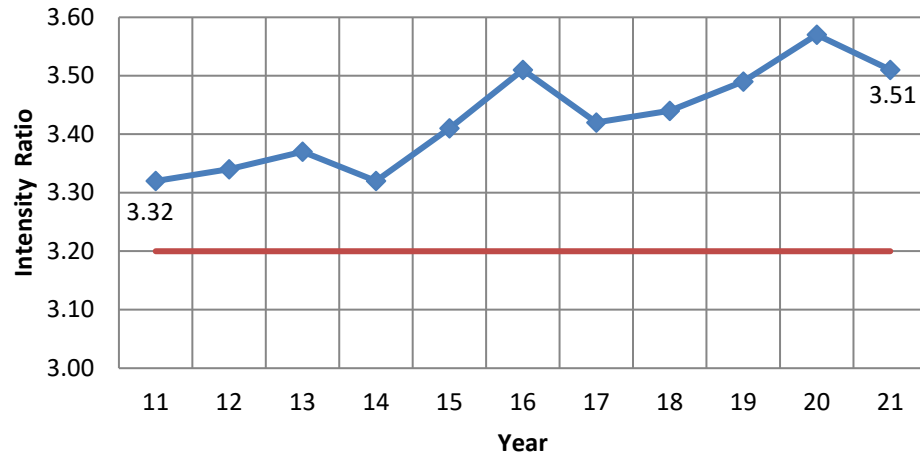
This increase is consistent with the City’s goal to increase residential density. Residential density is expected to rise in the next five years as recently annexed property is developed and downtown redevelopment continues.

¹ Note: Acres of land in the City on January 1, 2022, was calculated as acres of land in the City on January 1, 2021 (76,020) plus acres of land annexed in 2021 (93). The result (76,113) is higher than the acreage calculated using the City GIS system (76,028), 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

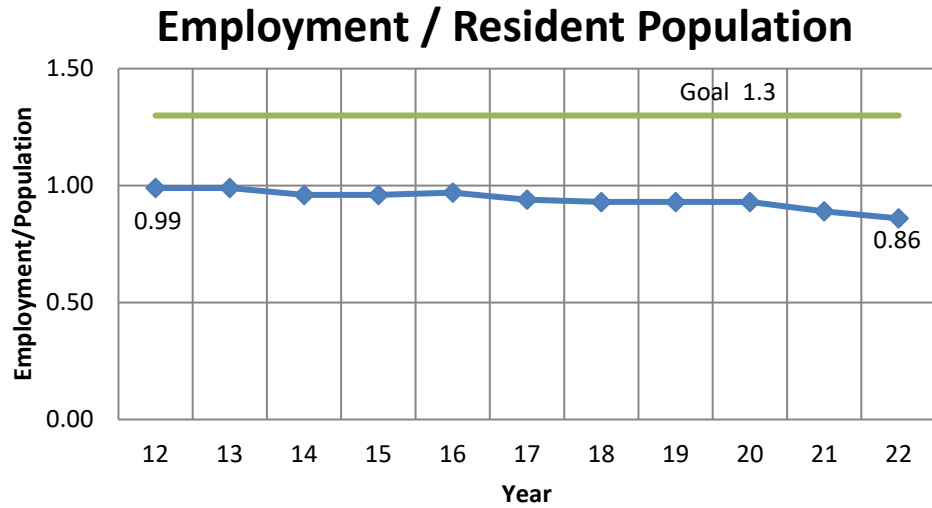
Jobs / Acres of City Land Area



3.2	3.37	3.62	Yes
Goal	2012	2022	Achieved?

Non-Residential Intensity is measured as jobs per acre of City land area. The City gained 8,358 jobs since last year and has gained 36,640 jobs since 2012. The City land area has increased by 93 acres since last year and 4,688 acres in the last 10 years. The current ratio of 3.62 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



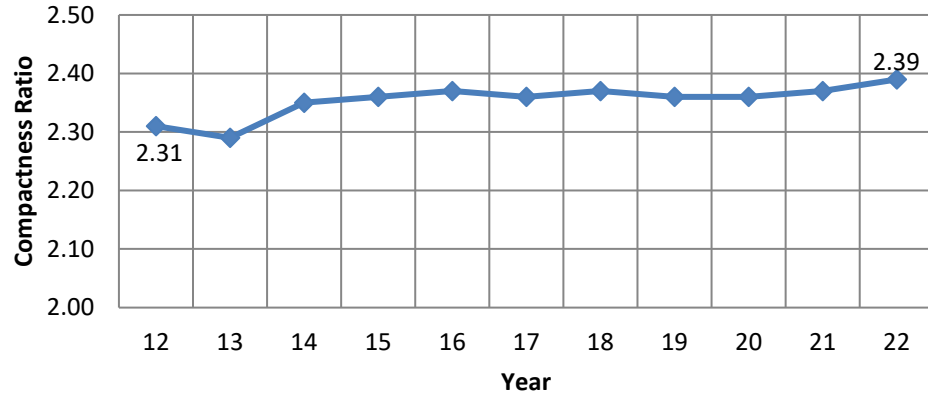
1.02 - 1.3	1.02	0.86	No
Goal	Baseline	2022	Achieved?

Jobs/Housing Balance is measured as a ratio of employment over resident population. The City gained 8,358 jobs since last year and has gained 36,640 jobs since 2012. The resident population increased by 20,844 persons since last year and 79,372 persons in the last 10 years. Based on these figures, the City's jobs/housing balance ratio slightly dropped since last year. This decline is due to the possibility that more people are working from home because of the COVID-19 pandemic, which is not captured in the data. Given strong population growth over the last year and employment conditions are expected to change nationwide, it is expected that job growth will gain momentum over the next year as well. The current ratio of 0.86 is just outside the City's target range of 1.02 to 1.3.

3. COMPACTNESS

A) CITY BOUNDARY

Miles of City Boundary / Square Miles of City Land Area



↓	2.31	2.39	No
Goal	2012	2022	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 93 acres during the past year. The City boundary in miles increased by 2.88 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%	13%	No
Office	10 - 25%	10%	Yes
Com.	30 - 50%	52%	No
PRI	5 - 20%	11%	Yes
Hosp.	1 - 10%	4%	Yes
Ind.	5 - 10%	10%	Yes
Use	GMP Goal	2021	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	2021	Achieved?
Res.	10 - 20%	21%	No
Office	10 - 15%	29%	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 2021, the mix of uses within Urban and Metropolitan Activity Centers fell within the target range for office, hospital, public and industrial. The percentage of residential use was about 2% 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 2021, 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 1%. The percentage of office use was about 14% over the target range. 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 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	148,281	46%	156,776	57%
Future Corridors	18,178	6%	21,404	8%

The total City population is 319,722. Approximately 52% live within ¼ mile of an existing or future transit corridor. The total employment is 275,393. Approximately 65% 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 44,336 units and the number of multi-family is 100,496 units. The percentage of existing multi-family units is 69%. The annual growth rate of multi-family is 1.1%. This growth can be attributed to the City's growing population and employment base.

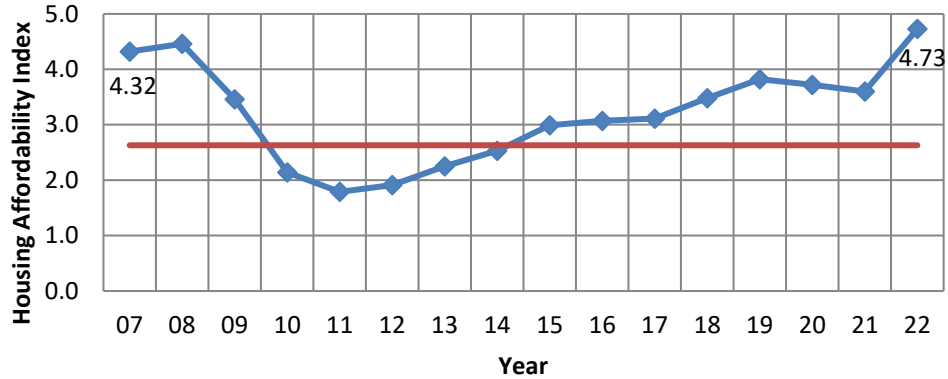
2. HOUSING TENURE

According to the City Land Use Database there are 144,832 housing units in the City of Orlando at the end of 2021, of which 44,336 are single family units and 100,496 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). Data from this source is currently not available at the time of the publication of this Indicators report for the number of units which are owner-occupied, or renter occupied. Staff will update the data the during next year's Indicators report.

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	4.73	No
Goal	Baseline	2022	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 2021 was \$335,000. This figure is \$90,000 more than last year and is the highest recorded since the previous peak reported in January 2007 when the median price was \$248,000. The median income for a family of four in Orange County increased from \$68,100 in 2020 to \$70,800 in 2021. This figure has increased by \$2,700 since last year and is a \$13,400 increase since 2007.

The City’s housing affordability goal is a ratio of 2.63. The City’s actual ratio for 2021 was 3.60 and as of January 1, 2022 it is 4.73. This figure is 1.13 greater than last year and is higher than the 2007 baseline of 4.32. 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, 2022 Statistics at a Glance, February 14, 2022, <https://www.orlandorealtors.org/marketreports>

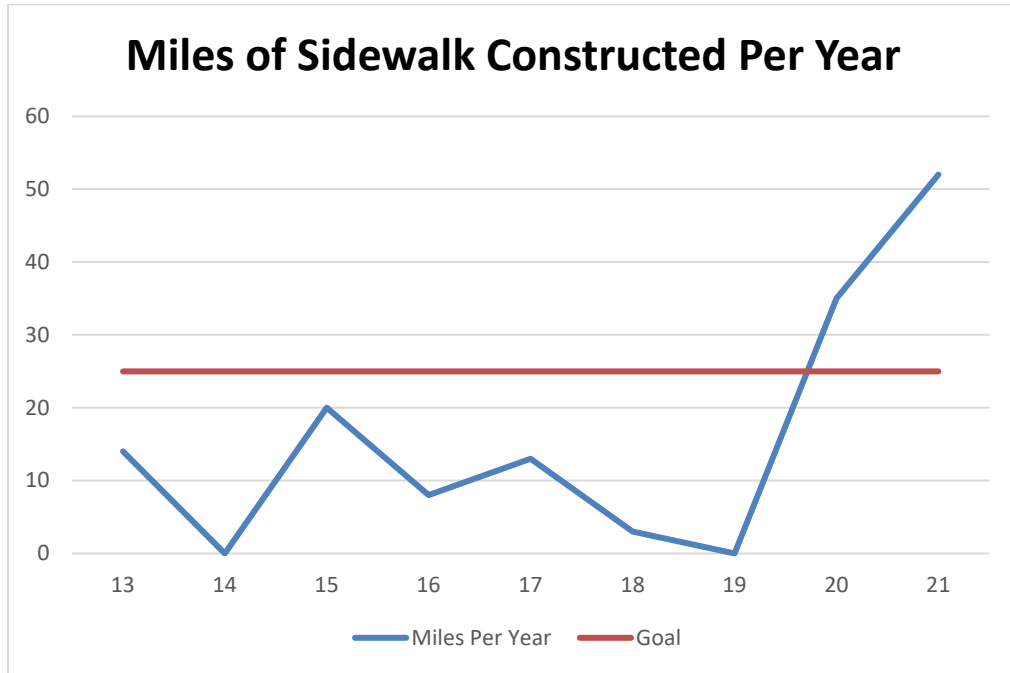
³ U.S. Department of Housing and Urban Development, FY2021 Median Family Income Documentation System, Orlando-Kissimmee, FL MSA Results. <https://www.huduser.gov/portal/datasets/il/il2021/2021summary.odn>

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	52	Yes
Goal	2021	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:

- 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
- 1,040 miles on August 1, 2020

- 1,092 miles on August 1, 2021

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 52 new miles of sidewalks were constructed by Public Works during 2021. 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, 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 even further. 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 368.92 miles of bikeways. This in an increase of 1.6 miles since last year, and an increase of 90.4 miles since 2012. In 2021, bikeways include:

Bike Paths:	45.59 miles
Bike Lanes:	271.56 miles
<u>Signed Routes:</u>	<u>53.37 miles</u>
TOTAL:	370.52 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 156.5 miles of designated Transit Corridors and 114.6 miles or 73% 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. 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 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 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](https://www.walkscore.com).

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 some bike infrastructure. This score fell 3 points 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 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](https://www.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, 2021, the vehicles miles traveled in Orange County was 40,336,769. This is a decrease from last year by 3,533,141 or 8.1%. This decrease is most likely due to the COVID-19 pandemic.

4. MODE CHOICE

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

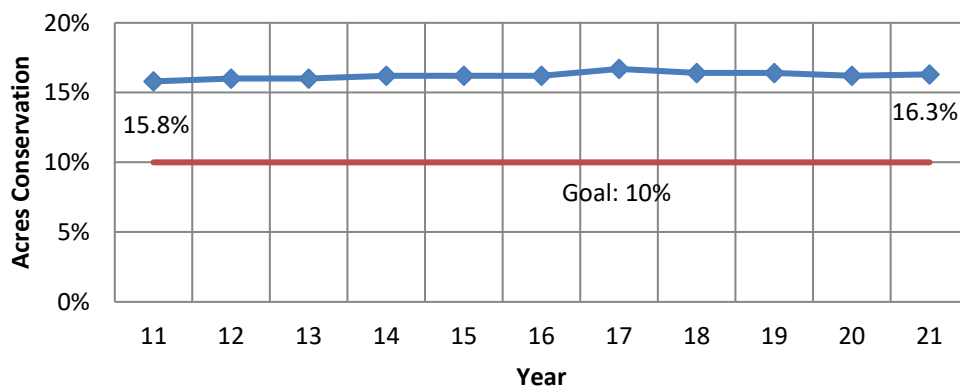
The City uses U.S. Census data from the American Community Survey (ACS) to obtain mode of choice. However, the data for 2020 is currently not available at the time of the publication of this Indicators report. Staff will update the data the during next year's Indicators report.

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%	16.3%	Yes
Goal	Baseline	2021	Achieved?

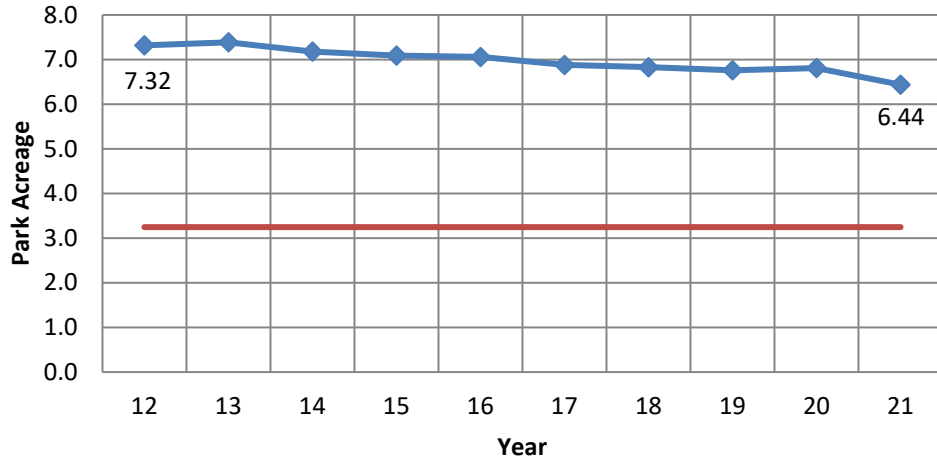
There is currently no accurate way to estimate all open space inside City limits. Open space may occur in any zoning district, may be publicly or privately owned, and may or may not be protected from future development. The next best option is to identify the amount of land that is designated as Conservation 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 93 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 33 acres since last year. Based on these figures, 16.3% 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

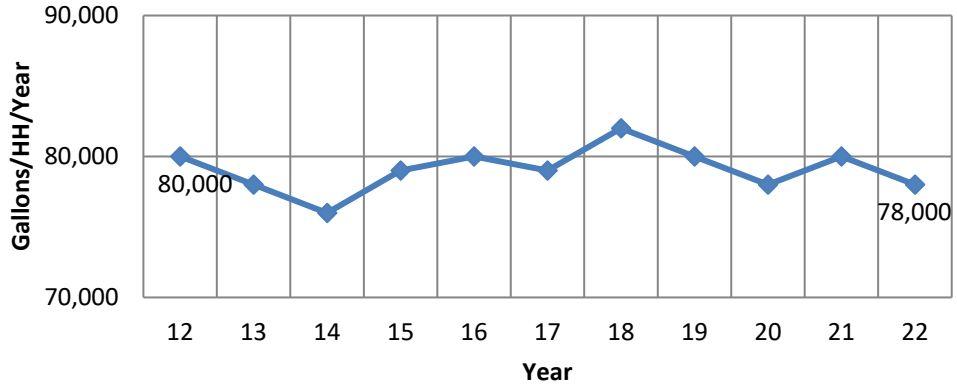


Parks level of service is measured as a ratio of acreage over resident population. The City has 2,058 acres of parks and added 298 acres since 2012. The resident population increased by 20,844 persons since last year and 79,372 persons in the last 10 years. Based on these figures, the City's parks ratio is above the required LOS by 3.19 acres per thousand population. There is currently a surplus of 1,076 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, the City portion of Lake George/Barber Park opened with two new soccer/multipurpose fields, along with additional bike trails along Nemours Parkway and Dowden Road, and small neighborhood parks and greens both in Lake Nona's Laureate Park, Pinewood Reserve and Storey Park.

3. WATER & ENERGY CONSUMPTION

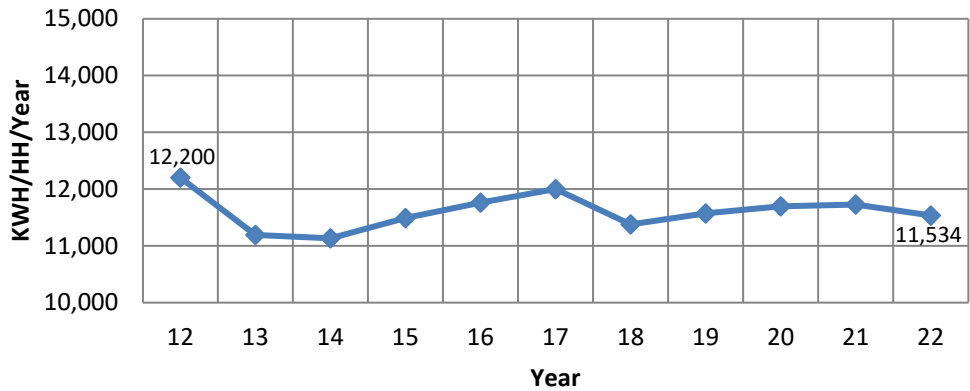
“The City shall reduce total per household potable water demand by an additional 3 percent between 2017 and 2020, and an additional 4 percent by 2040, from a baseline in 2017 of 79,000 gallons per household per year.” - GMP Potable Water Element Objective 1.2.

Annual Average Residential Water Consumption



↓	79,000	78,000	Yes
Goal	2017 Baseline	2022	Achieved?

Annual Average Residential Electric Consumption



↓	12,301	11,534	Yes
Goal	Baseline	2022	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 2.5% when compared to the 2012 condition. Data also indicates that energy consumption has decreased by 1.7% when compared to last year and decreased by 6.7% 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 2021, the City of Orlando:

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

Major planning accomplishments in 2021 included:

- Future - Ready City Implementation Electric Vehicle Charging Stations
- Transportation Element Amendments
- Floodplain Ordinance Update
- Property Rights Element Amendment

In addition, the following specific activities will be addressed in 2022:

- Livable Orlando: Age Friendly Initiative Action Plan
- 2022 Water Supply Facilities Work Plan Update & OUC Consumptive Use Permit
- Update Growth Projections Report
- Parks Master Plan Update
- Housing (Consolidated Plan and Local Housing Assistance Plan)

* * *

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	1/1/2021	1/1/2022	Change from Previous Year	Community Development Goal	
A1	Population Total Single Family Units Multifamily Units		221,138	227,890	233,220	235,860	237,640	239,235	240,350	242,908	253,355	258,583	265,531	275,338	281,053	285,210	291,957	298,878	319,722	20,844	376,110 projected by 2045	
A2	Employment Total New Growth Office sq. ft. Retail sq. ft. Hotel sq. ft. Indust sq. ft. Hospital sq. ft. Civic sq. ft.		215,161	226,364	228,902	235,417	234,076	237,200	238,753	240,839	242,412	248,966	256,148	259,112	260,841	264,980	270,846	267,035	275,393	8,358	Increase	
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	298,878 76,020 3.93	319,722 76,113 4.20	20,844 93 0.27	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	267,035 76,020 3.51	275,393 76,113 3.62	8,358 93 0.11	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	267,035 298,878 0.89	275,393 319,722 0.86	8,358 20,844 0.40	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 2.29	256.13 111.7 2.35	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	2.88 0.2 0.02	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	2020	2021		2045 Min. 2045 Max.	
		Residential	9%	13%	11%	11%	12%	11%	12%	14%	14%	13%	14%	13%	14%	14%	14%	13%	13%	13%	0%	15%
		Office	10%	8%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	9%	10%	10%	0%	10%
		Commercial	52%	54%	50%	50%	52%	52%	52%	50%	50%	51%	50%	50%	50%	51%	52%	53%	52%	52%	-1%	30%
		Public, Recreational, Institutional	11%	9%	11%	10%	10%	12%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	10%	11%	1%	5%
		Hospital	6%	6%	6%	8%	4%	4%	4%	4%	5%	5%	5%	5%	4%	4%	4%	4%	4%	4%	0%	1%
		Industrial	12%	10%	12%	11%	12%	12%	12%	11%	11%	10%	10%	11%	11%	10%	10%	10%	10%	10%	0%	5%
		TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	5%
	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	2020	2021		2045 Min. 2045 Max.	
		Residential												17%	16%	16%	18%	17%	21%	4%	10%	
		Office												33%	33%	33%	31%	31%	29%	-2%	10%	
		Commercial												31%	32%	31%	31%	33%	32%	-1%	30%	
		Public, Recreational, Institutional												6%	6%	6%	6%	3%	2%	-1%	5%	
		Hospital												2%	2%	2%	1%	2%	2%	0%	1%	
		Industrial												11%	11%	12%	13%	14%	14%	0%	8%	
		TOTAL												100%	100%	100%	100%	100%	100%	0%	5%	
B5	Transit Access	Population within 1/4 mile of Transit Corridor Employment within 1/4 mile of Transit Corridor										116,883	117,614	95,030	88,411	Note: Data updated with Transit Corridor update	153,944	144,264	148,281	4,017	Increase	
												154,053	155,403	94,664	78,227		166,762	155,054	156,776	1,722		
C1	Housing Mix	Percent multifamily (existing) Percent multifamily (annual growth)								67.79%	67.97%	68.13%	68.50%	68.63%	68.49%	68.74%	68.32%	69.39%	0.25%	Monitor trends		
												1.9%	2.9%	1.9%	-0.2%	0.4%	-0.6%	1.1%				
C2	Housing Tenure	Owner-Occupied / Total Occupied = % Owner-Occupied Renter-Occupied / Total Occupied = % Renter-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%	42,272 102,564 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%	41,239 109,454 37.7%	Not yet available	Not yet available	1.0%	Increase	
			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 56.9%	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 63.3%	72,316 114,176 62.3%	68,215 109,454 62.3%	Not yet available	Not yet available	-1.0%		
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	\$245,000 \$68,100 3.60	\$335,000 \$70,800 4.73	\$90,000 \$2,700 1.13	Maintain ratio less than 2.7	
D1a	Pedestrian Access	Miles of sidewalk	August 2005: 560	August 2006: 578.1	August 2007: 592	September 2008: 599	January 21, 2010: 818	January 11, 2011: 826	January 20, 2012: 946	Aug. 1, 2012 (CAR): 947	Aug. 1, 2013 (CAR): 961	Aug. 1, 2014 (CAR): 961	Aug. 1, 2015 (CAR): 981	Aug. 1, 2016 (CAR): 989	Aug. 1, 2017 (CAR): 1002	Aug. 1, 2018 (CAR): 1005	Aug. 1, 2019 (CAR): 1005	Aug. 1, 2020 (CAR): 1040	Aug. 1, 2020 (CAR): 1092	52	Add 4 miles per year.	
							Note: Change from previous year reflects 2009 sidewalk inventory.		Note: Change from previous year reflects 2011 sidewalk inventory.													

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	1/1/2021	1/1/2022	Change from Previous Year	Community Development Goal	
D1b	Miles of bike infrastructure								280.1	293.2	317.6	317.6	322.4	338.8	361.5	363.5	364.2	368.9	370.5	1.6	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	156.5	156.5	156.5	0	Increase
D2a	Walkscore											39	39	41	42	42	41	41	41	41	0	Increase
D2b	Bikescore											52	53	53	53	55	60	60	57	-3	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	43,869,910	40,336,769	Not yet available	8.1%	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%	Drive Alone 76.7%, Carpool 10.3%, Transit 1.5%, Walk 1.5%, Other 3.2%, Work Home 6.8%	Not yet available	Not yet available	Not yet available	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%	12,334 76,020 16.2%	12,367 76,113 16.3%	33 93 0.1%	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%	2,034 298,878 6.81%	2,058 319,722 6.44%	24 20,844 -0.37%	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. * Figures obtained from OUC Annual Report. Data is system wide (not City-specific).	141,000 as of September 30, 2005*	140,000 as of September 30, 2006*	118,000 as of September 30, 2007*	83,000 as of September 30, 2008*	79,000 as of September 30, 2009*	77,000 as of September 30, 2010*	80,000 as of September 30, 2011*	78,000 as of September 30, 2012*	76,000 as of September 30, 2013*	79,000 as of September 30, 2014*	80,000 as of September 30, 2015*	79,000 as of September 30, 2016*	82,000 as of September 30, 2017*	80,000 as of September 30, 2018*	78,000 as of September 30, 2019*	80,000 as of September 30, 2020*	78,000 as of September 30, 2021*	-2,000 -2.5%	Decrease	
E3b	Per household energy consumption	Annual average residential electric consumption (per household) in KWH. * Figures obtained from OUC Annual Report. Data is system wide (not City-specific).	13,058 as of September 30, 2005*	12,908 as of September 30, 2006*	12,301 as of September 30, 2007*	12,052 as of September 30, 2008*	12,143 as of September 30, 2009*	12,748 as of September 30, 2010*	12,200 as of September 30, 2011*	11,192 as of September 30, 2012*	11,134 as of September 30, 2013*	11,488 as of September 30, 2014*	11,760 as of September 30, 2015*	11,999 as of September 30, 2016*	11,378 as of September 30, 2017*	11,570 as of September 30, 2018*	11,696 as of September 30, 2019*	11,727 as of September 30, 2020*	11,534 as of September 30, 2021*	-193 -1.7%	Decrease	

Source: City of Orlando Economic Development Department, City Planning Division March 2021