
GROWTH MANAGEMENT PLAN INDICATORS

2024 ANNUAL REPORT

(January 1, 2024– December 31, 2024)

April 1, 2025



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

TABLE OF CONTENTS

A.	Growth in 2024	1
1.	Population.....	1
2.	Employment.....	1
3.	Projects completed	2
4.	Projects approved (including bonuses).....	4
B.	Smart Growth Indicators	6
1.	Residential Density	6
a)	Resident Population per Developable Acre.....	6
2.	Employment Density.....	7
a)	Jobs per Acre	7
b)	Jobs to Housing Ratio	8
3.	Compactness.....	9
a)	City Boundary	9
4.	Mixed Use Development	10
5.	Transit Access.....	12
C.	Housing Indicators.....	12
1.	Housing Mix	12
2.	Housing Tenure.....	13
3.	Affordable Housing	14
D.	Transportation Indicators.....	15
1.	Multi-modal Infrastructure	15
a)	Sidewalks	15
b)	Bicycle Infrastructure	16
c)	Transit Corridors	16
2.	Active Transportation	16
a)	Walkscore	16
b)	Bikeshcore	17
3.	Vehicle Miles Traveled	17
4.	Mode Choice	17
E.	Environmental Indicators	18
1.	Conservation Acreage	18
2.	Park Acreage & ParkScore.....	19
3.	Water & Energy Consumption	20
F.	Looking Back and Looking Ahead	21

EXHIBITS

Exhibit 1: Baseline Conditions and Annual Indicators

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CITY OF ORLANDO

GROWTH MANAGEMENT PLAN INDICATORS

2024 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 2024

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 2024, population is 339,459, and it grew by 8,159 since last year. The previous year (2023) estimate 332,302 was adjusted to coincide with the latest Bureau of Economic and Business Research (BEBR) population numbers and the 2024-2050 Growth Projections Report.

New development consists of:

- 645 single family units
- 2,596 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 2024, employment is 300,332. The previous year (2023) estimate 298,808 was adjusted to coincide with the 2024-2050 Growth Projections Report.

New development consists of:

- 177,680 sq. ft. commercial
- 133,865 sq. ft. office
- -292 hotel rooms
- 679,211 sq. ft. industrial
- 0 sq. ft. hospital
- 619,425 sq. ft. civic

3. PROJECTS COMPLETED

The following large-scale projects received a certificate of occupancy during calendar year 2024. 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		District
Alexan at Mills 50	BLD2021-16523	1611 E. Colonial Dr.	74 du & 1,864 sq. ft. retail	161 du & 3,728 sq. ft. retail	4
	BLD2021-16522	1647 E. Colonial Dr.	74 du & 1,864 sq. ft. retail		
	BLD2021-14923		13 du		
Mallory Square Apartments	BLD2021-11483	8816 Albury Drive	64 du	234 du	1
	BLD2021-11482	8822 Albury Drive	56 du		
	BLD2021-11480	8870 Albury Drive	56 du		
	BLD2021-11481	8876 Albury Drive	48 du		
	BLD2021-11486	8840 Albury Drive	2 du		
	BLD2021-11487	8846 Albury Drive	2 du		
	BLD2021-11488	8852 Albury Drive	2 du		
	BLD2021-11484	8828 Albury Drive	2 du		
	BLD2021-11485	8834 Albury Drive	2 du		
Hoffner Avenue Apartments	BLD2021-13730	5031 Hoffner Ave.	24 du	180 du	2
	BLD2021-13731	5015 Hoffner Ave.	36 du		
	BLD2021-13728	5039 Hoffner Ave.	24 du		
	BLD2021-13729	5047 Hoffner Ave.	24 du		
	BLD2021-13732	5007 Hoffner Ave.	36 du		
	BLD2021-13012	5127 Hoffner Ave.	36 du		

Best Western VIB Hotel	BLD2018-20770	6801 Visitors Circle	118 hotel rooms		6
Society Orlando Tower	BLD2020-11234	410 N Orange Ave.	484 du & 28,039 sq. ft. retail		5
Grand National Apartments	BLD2023-13274	6331 Adriana Ave.	160 du	350 du	6
	BLD2021-19342	6353 Adriana Ave.	105 du		
	BLD2021-19344	6375 Adriana Ave.	85 du		
Upshot Medical Center	BLD2021-17271	1724 N. Mills Ave.	77,430 sq. ft. office		3
Self-Storage	BLD2021-18520	2334 S. Semoran Blvd.	93,900 sq. ft. industrial		2
Nona Cove Storage	BLD2019-21987	14812 Narcoossee Rd	119,985 sq. ft. industrial 8,480 sq. ft. retail		1
Mahogany Point	BLD2023-17277	4510 Portier St.	150,480 sq. ft. industrial		2
MCO Logistics Center	BLD2022-20193	901 Mid Florida Dr.	167,705 sq. ft. industrial		1
Lake Nona Aloft Hotel & Conference Center	BLD2021-20036	7215 Corner Dr.	205 hotel rooms 9,140 sq. ft. office 2,240 sq. ft. retail		1
Colonial Garden Apartments	BLD2023-11202	4919 W Colonial Dr.	216 du		5
	BLD2023-11203				
	BLD2023-11204				
	BLD2023-11205				
Luminary Middle School	Permit by State	9446 Luminary Blvd	200,00 sq. ft. civic		1
Innovation High School	Permit by State	12401 Dowden Rd	400,000 sq. ft. civic		1
District West Apartments	BLD2022-10224	1148 N John Young Pkwy	30 du	120 du	5
	BLD2022-10225	1154 N John Young Pkwy	30 du		
	BLD2022-10226	1160 N John Young Pkwy	60 du		
Orlando Corporate Center Warehouse	BLD2021-12433	6275 S Goldenrod Rd	92,015 sq. ft. industrial		1
Encore Narcoossee Apartments	BLD2021-21545	7559 Narcoossee Rd	60 du	126 du	1
	BLD2021-21546	7567 Narcoossee Rd	66 du		
Fairfield Inn	BLD2022-14156	3551 Millenia Blvd	109 hotel rooms		4
JYP Mixed Use	BLD2022-10960	2250 N John Young Pkwy	71,992 sq. ft. industrial 6,315 sq. ft. retail 1,721 sq. ft. office		5
Bainbridge – The Grand	BLD2022-13926	5923 Caravan Court	118 du		6

Orl. Nautique Self Storage	BLD2021-15751	2312 S Division Avenue	90,728 sq. ft. industrial	4
Palm Gardens Apartments	BLD2023-17996	929 W Colonial Dr.	150 du	3

4. PROJECTS APPROVED

The following large-scale projects received approval by the Municipal Planning Board or the Development Review Committee during calendar year 2024. 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
Starwood/Meridian Parks N-3	MPL2023-10073	N of Launch Port Rd., E of Dowden Rd., S of SR 528 & W of Innovation Way	237 du	1
Sports and Entertainment District	ZON2023-10024 MPL2023-10074	100 S. Hughey Avenue	261 hotel rooms 273 du 470,572 sq. ft. office/retail	5
Bruton Blvd. Self-Storage	CUP2023-10032	3092 Bruton Blvd.	100,000 sq. ft. personal storage	6
Southport Beazer Homes	ZON2023-10026 MPL2023-10079	8479 Daetwyler Drive	550 du	1
Meridian Parks N-2	MPL2024-10009	N of Launch Point Rd., E of Dowden Rd., S of SR 528, W of Monument Pkwy	340 du	1
Kirkman Point	MPL2024-10012	7079 S. Kirkman Road	314 du	6
Major Boulevard Condo Tower	MPL2024-10022	5600 Major Blvd	174 du 11,554 sq. ft. commercial	6
Modera Baldwin Square	MPL2024-10003	756 Bennett Road	324 du	3
Southeastern Oaks	ZON2024-10006	11048 Clapp Simms Duda Rd	500 du	1
Beachline Industrial Warehouses – Sunbridge Parcel 1A	MPL2024-10033	Innovation Way & Monument Pkwy., N of SR 528, E of SR 434, SW of OUC	747,000 sq. ft. warehouse	1
Orlando Union Rescue Mission	ZON2024-10008	1525 W. Washington St.	108 du	5
Vista Park Phase 4A	MPL2024-10038	W of S. Econ Trail, E of Lee Vista Blvd., N of SR 528 & W of SR 417	102 du	1

Sunbridge Business Park Warehouse Parcel 3	MPL2024-10040	N of SR 528, E of SR 434 & SW of Innovation Way	1.93 million sq. ft. warehouse	1
Meridian Parks N-6	MPL2024-10042	N of Launch Point Rd., E of Pergola Ave., S of SR 528, W of Boggy Ranch	264 du	1
AIPO T15/T16 Warehouse	MPL2024-10053	11001 Palmbay Drive	320,620 sq. ft. warehouse	1
Best Western Conversion	MPL2024-10056	2014 W. Colonial Drive	110 du	5
Altera Fairview	MPL2024-10063	4765 Sandy Shores Dr. & 2040 Lee Rd.	328 du	3
1840 E Colonial Drive Mixed-Use Development	MPL2024-10057	1840, 1904 & 1920 E. Colonial Drive	317 du 30,246 sq. ft. commercial	4
West Jefferson Street Hotel	MPL2024-10060	47 W. Jefferson St.	246 hotel rooms	5
Orlando Executive Airport Hangars	MPL2024-10062	400 Herndon Avenue	257,280 sq. ft. warehouse	2
Sunbridge Residential Neighborhood 6	MPL2024-10069	8300 Monument Parkway	526 du	1
Vista Park Phase 4S	MPL2024-10071	S. Econlockhatchee Trl., N of SR 528, E of Narcoossee Rd., S of Lee Vista Blvd., W of SR 417	139 du	1
Kelly Tower Hotel	CUP2024-10009	1000 W. Pine Street	120 hotel rooms 260 du	5
Parramore Tribute Tower Hotel	CUP2024-10010	1016 & 1010 W. Church St. and 1001 & 1003 W. Jackson St.	280 hotel rooms	
Lake Nona N-4 Townhomes	MPL2023-10076	N of Luminary Blvd., E of Centerline Dr., & W of Narcoossee Rd.	125 du	1
Southeastern Oaks Eastern Parcel	MPL2023-10070	E of Narcoossee Rd., S of Clapp Simms Duda Rd., N of Osceola County line	140 du	1
The Beacon	ARB2022-10052	630 W. Amelia Street	106 du	5
Vkare	MPL2024-10016	12615 & 12621 Narcoossee Rd.	35,000 sq. ft. commercial & 59,082 sq. ft. commercial/off ice	1
Nemours Children's Hospital South Expansion	MPL2024-10028	6635 Nemours Pkwy	105,700 sq. ft. hospital	1
Southeastern Oaks Village Center	MPL2024-10047	11048 Clapp Simms Duda Rd. & 14901 Narcoossee Rd.	492 du	1

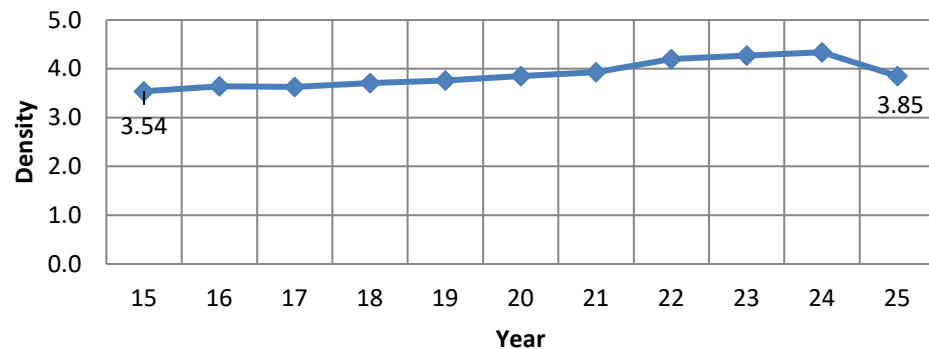
Advent Health Narcoossee Expansion	MPL2024-10054	10999 Narcoossee Road	105,200 sq. ft. medical office & 30,000 sq. ft. commercial	1
Laureate Park Parcel N-1, Phase 1	MPL2024-10072	W of Centerline Drive & N of Osceola County	152 du	1

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 8,159 persons since last year and 80,876 in the last 10 years. City land area has increased 11,899 acres since last year and 15,139 acres in the last 10 years.¹

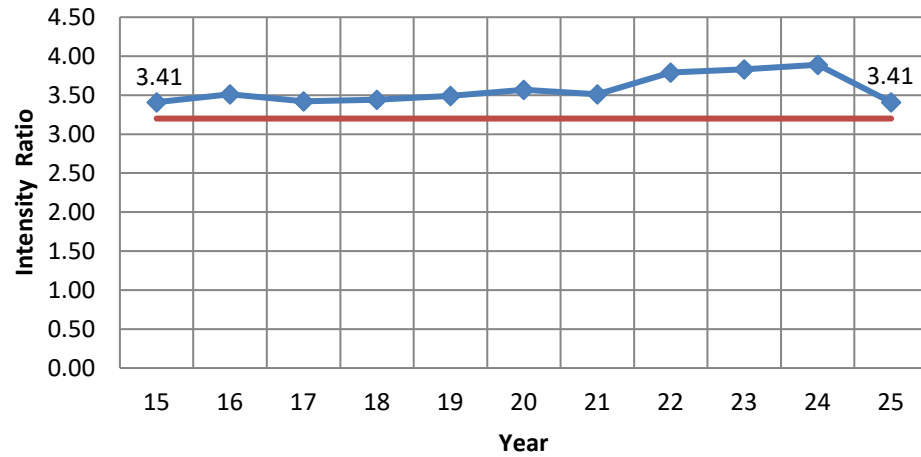
This increase is consistent with the City’s goal to increase residential density. Residential density is expected to rise in the next five years as recently annexed property is developed and downtown redevelopment continues.

¹ Note: Acres of land in the City on January 1, 2025, was calculated as acres of land in the City on January 1, 2024 (76,282) plus acres of land annexed in 2024 (11,899). The result (88,181) is higher than the acreage calculated using the City GIS system (88,090), 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

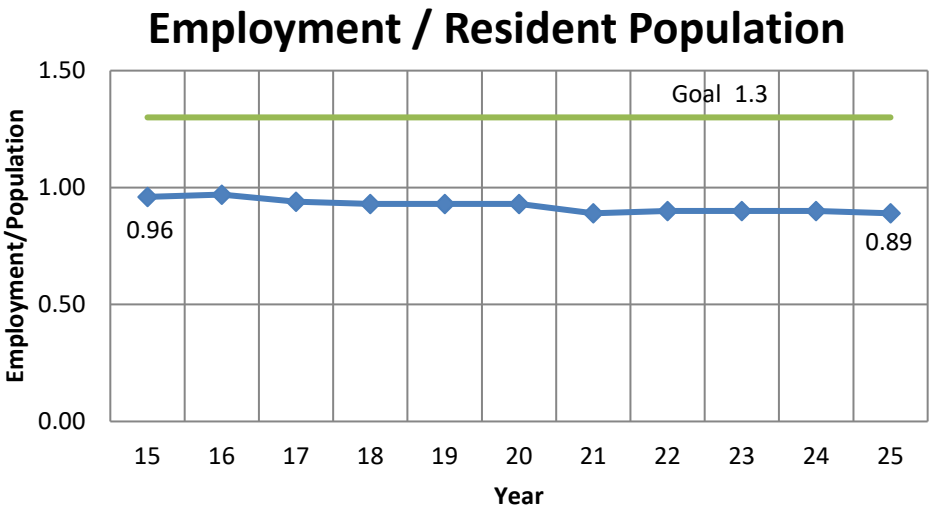
Jobs / Acres of City Land Area



3.2	3.41	3.41	Yes
Goal	2015	2025	Achieved?

Non-Residential Intensity is measured as jobs per acre of City land area. The City gained 3,307 jobs since last year and has gained 51,366 jobs since 2015. The City land area has increased by 11,899 acres since last year and 15,139 acres in the last 10 years. The current ratio of 3.41 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



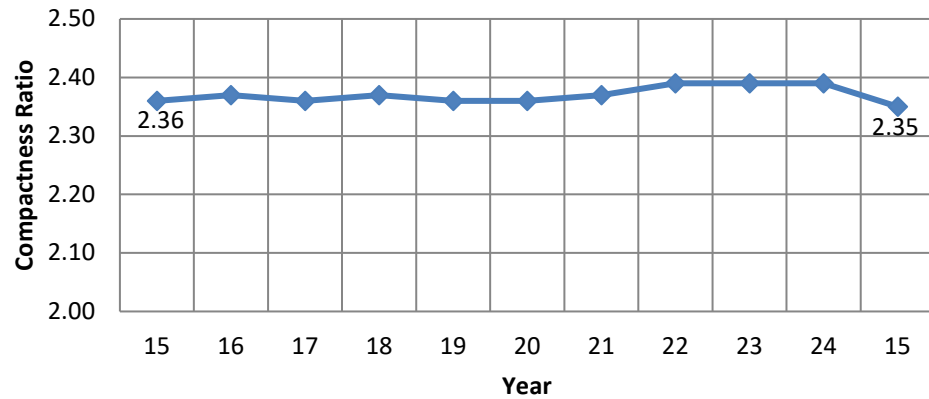
1.02 - 1.3	1.02	0.89	No
Goal	Baseline	2025	Achieved?

Jobs/Housing Balance is measured as a ratio of employment over resident population. The City gained 3,307 jobs since last year and has gained 51,366 jobs since 2015. The resident population increased by 8,159 persons since last year and 80,876 persons in the last 10 years. Based on these figures, the City’s jobs/housing balance ratio is relatively the same since last year. With the lingering effects of the COVID-19 pandemic, 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 0.89 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



↓	2.36	2.35	Yes
Goal	2015	2025	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 11,899 acres during the past year. The City boundary in miles increased by 38.82 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	2025	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			
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
Use	GMP Goal	2025	Achieved?

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 2024, 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 2024, 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	137,912	41%	135,182	45%
Future Corridors	16,501	5%	14,879	5%

The total City population is 339,459. Approximately 46% live within ¼ mile of an existing or future transit corridor. The total employment is 300,332. Approximately 50% of employment centers are within ¼ mile of an existing or future transit corridor.

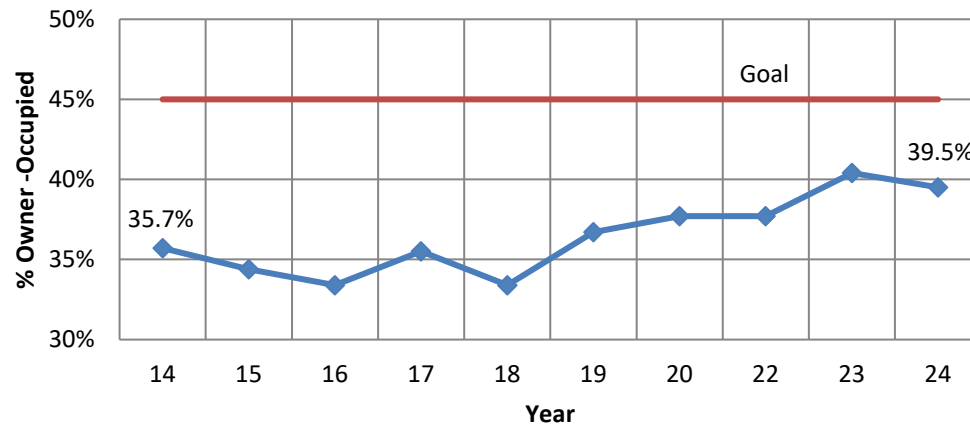
C. HOUSING INDICATORS

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 46,168 units and the number of multi-family is 111,212 units. The percentage of existing multi-family units is 71%. The annual growth rate of multi-family is 0.2%. This growth can be attributed to the City's growing population and employment base.

2. HOUSING TENURE

Owner-Occupied Dwelling Units



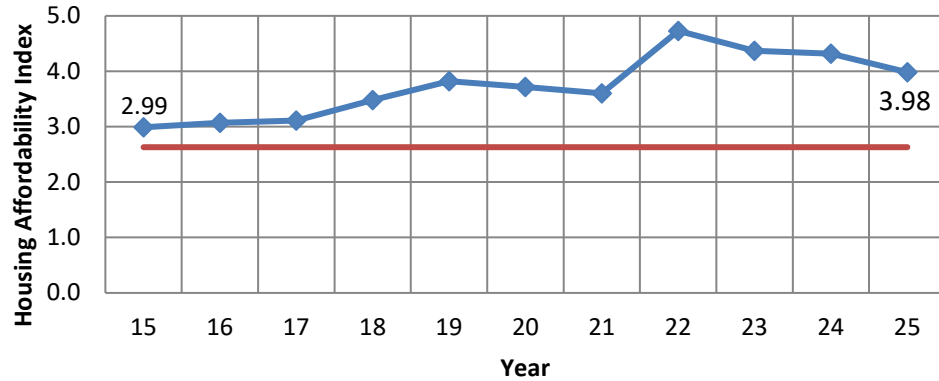
45%	35.7%	39.5%	No
Goal	2014	2024	Achieved?

According to the City Land Use Database there are 157,380 housing units in the City of Orlando at the end of 2024, of which 46,168 are single family units and 111,212 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 2023 ACS has been released and it is reported that the City of Orlando has an estimate of 141,669 housing units are occupied. Of that number, 55,956 units (39.5%) are owner-occupied, and 85,713 units (60.5%) are renter-occupied. The percentage of owner-occupied decreased and renter occupied has increased 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	3.98	No
Goal	Baseline	2025	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 2024 was \$360,000. This figure is \$10,500 less than last year. The median income for a family of four in Orange County increased from \$85,700 in 2023 to \$90,400 in 2024. This figure has increased by \$4,700 since last year and is a \$35,600 increase since 2015.

The City's housing affordability goal is a ratio of 2.63. As of January 1, 2025, the City's ratio is 3.98. This figure is 0.34 less than last year but is still greater than the goal ratio. Housing prices are increasing, 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, 2025 Statistics at a Glance, February 11, 2025, <https://www.orlandorealtors.org/marketreports>

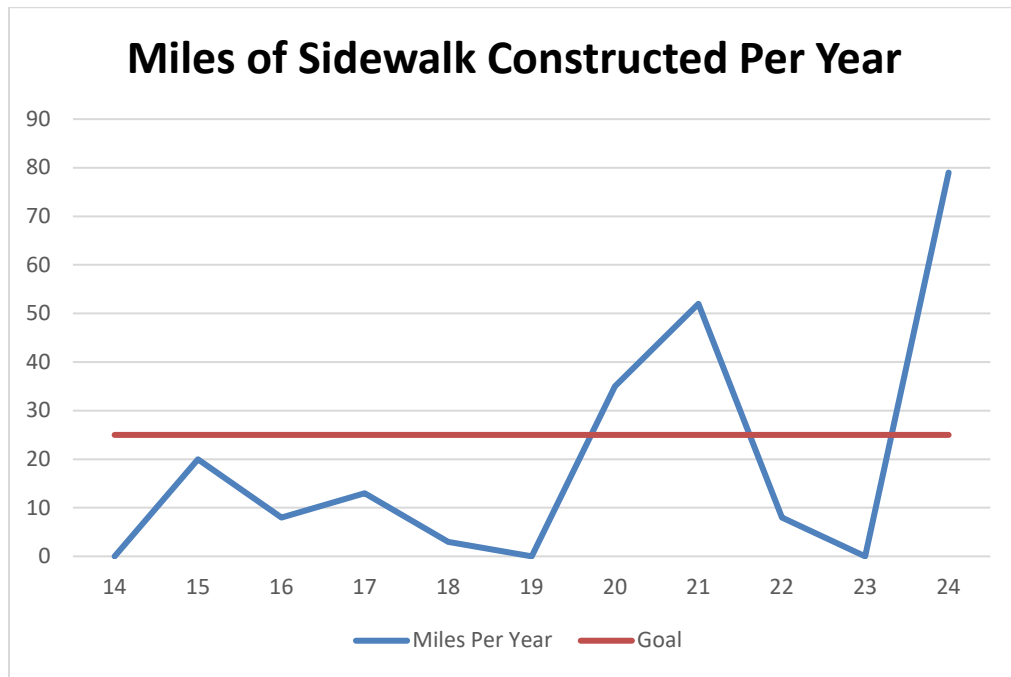
³ U.S. Department of Housing and Urban Development, FY2024 Median Family Income Documentation System, Orlando-Kissimmee, FL MSA Results. <https://www.huduser.gov/portal/datasets/il/il2024/2024summary.odn>

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	79	Yes
Goal	2024	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
- 1,179 miles on August 1, 2024

The Transportation Department reported 79 new miles of sidewalks were constructed by Public Works during 2024. 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, 2023 and June 30, 2024, there were some changes made to the bicycle network which resulted in reduced mileage from last year. The City of Orlando currently has 325 miles of bikeways. In 2024, bikeways include:

Bike Paths:	95 miles
Bike Lanes:	186 miles
<u>Signed Routes:</u>	<u>44 miles</u>
TOTAL:	325 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, 2025, the vehicles miles traveled in Orange County was 46,357,045. This is an increase from last year by 3,041,717 or 6.7%.

4. MODE CHOICE

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

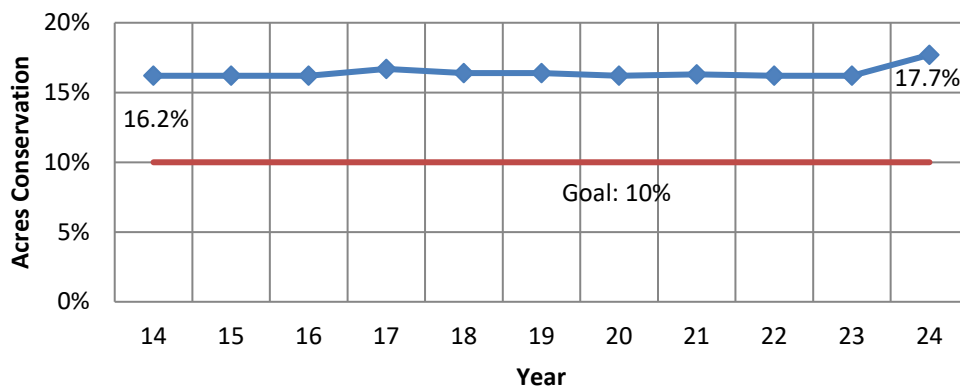
According to the 2023 ACS data for the City of Orlando, of the 175,845 workers that travel to work, 68.3% drive a vehicle alone, 8.8% carpool, 1.6% use transit, 2% walk to work and 17.4% work from home. Those that chose to use transit decreased by 0.3% from 2022, and those who work from home increased by 0.2%.

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



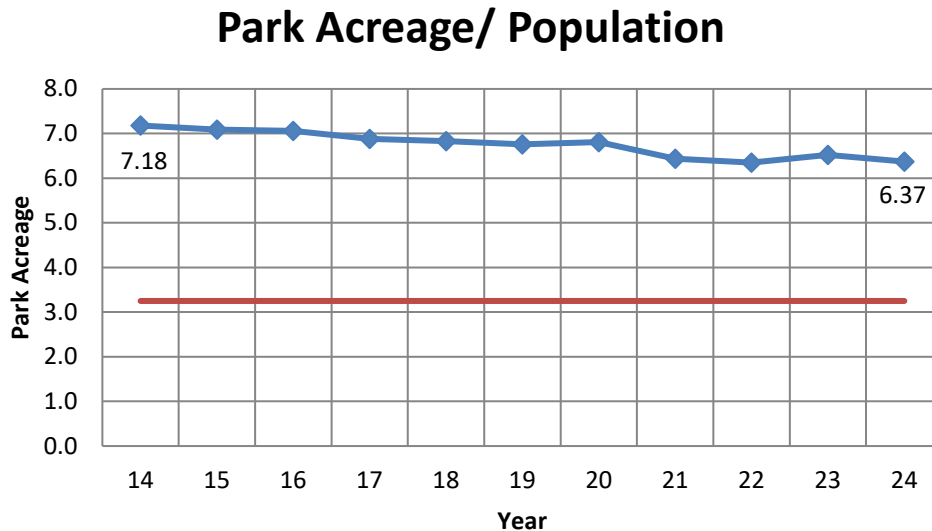
10%	10.8%	17.7%	Yes
Goal	Baseline	2024	Achieved?

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 11,899 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 3,201 acres since last year due to the major annexations of the Sunbridge and Camino properties. Of these annexations, the Conservation areas account for 41% of the annexed properties. Based on these figures, 17.7% 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.



Parks level of service is measured as a ratio of acreage over resident population. The City has 2,162 acres of parks and added 329 acres since 2015. The resident population increased by 8,159 persons since last year and 80,876 persons in the last 10 years. Based on these figures, the City's parks ratio is above the required LOS by 3.12 acres per thousand population. There is currently a surplus of 1,074 acres citywide. In the coming years, the increase in acres will come from the Meridian Park Community Park and Poitras Park.

ParkScore

Each year, the City of Orlando provides data to the Trust for Public Land (TPL) for their annual ParkScore® Index, a national comparison of park systems across the 100 most populated cities in the United States. The index analyzes parks systems based on five categories which TPL considers important for an excellent municipal park system including: access, investment, amenities, acreage, and equity.

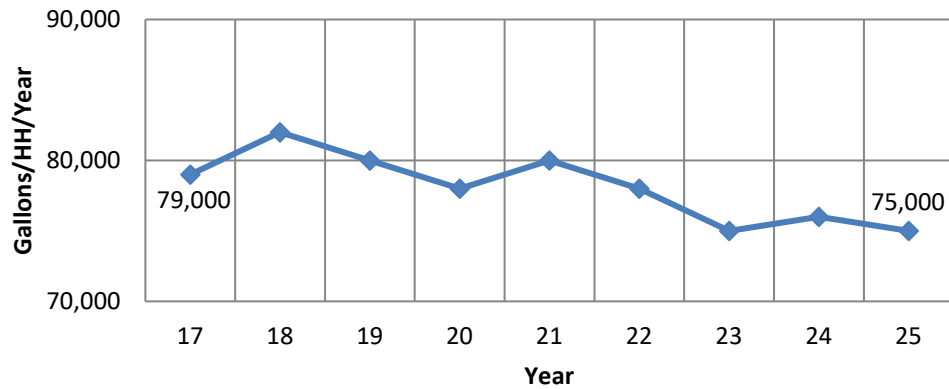
In 2024, Orlando's park system ranked 64th out of 100 cities, receiving a total score of 47.6 out of 100, with points assigned based on a comparative analysis against the other 99 cities for each measure. 70% of Orlando residents live within a 10-minute walk of a park – the median of the 100 most populous U.S. cities is 74%, while the median for all urban cities and towns in the U.S. is 55%.

Year	Rank	Score	Percentage of Orlando Residents within a 10-Minute Walk of a Park
2021	62	45.5	64%
2022	66	45.8	65%
2023	64	46.5	67%
2024	64	47.6	70%

3. WATER & ENERGY CONSUMPTION

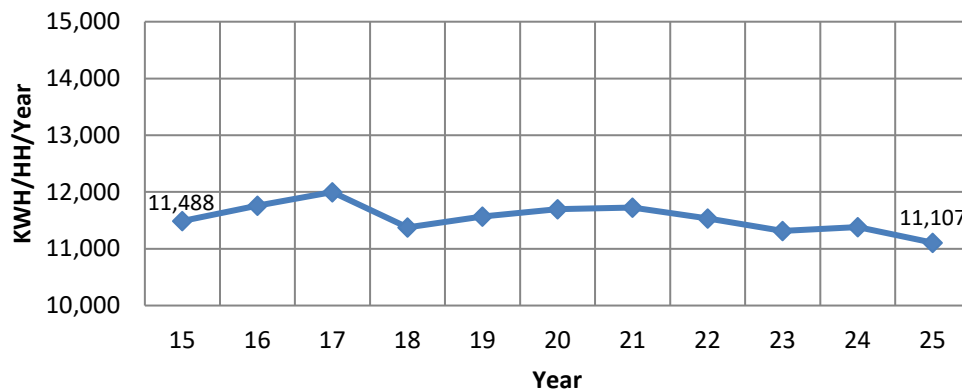
“The City shall reduce total per household potable water demand by an additional 3 percent between 2017 and 2020, and an additional 4 percent by 2040, from a baseline in 2017 of 79,000 gallons per household per year.” - GMP Potable Water Element Objective 1.2.

Annual Average Residential Water Consumption



↓	79,000	75,000	Yes
Goal	2017 Baseline	2025	Achieved?

Annual Average Residential Electric Consumption



↓	12,301	11,107	Yes
Goal	Baseline	2025	Achieved?

Water and electric consumption figures were obtained from Orlando Utilities Commission (OUC). Current data indicates that per household water consumption decreased by 1,000 gallons or 1.3% when compared to last year and when compared to the 2015 condition it has decreased by 5,000 gallons. Data also indicates that energy consumption has decreased by 2.5% when compared to last year and decreased by 9.7% 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 2024, the City of Orlando:

- Met its community development goals for residential and non-residential density (B1), jobs per acre (B2a), compactness (B3a), mixed use development in Metropolitan & Urban Activity Centers (B4), transit access (B5), miles of transit corridors (D1c), number of new sidewalks (D1a), 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 jobs/housing balance (B2b), affordable housing (C3), vehicles miles traveled (D3) and water & energy consumption (E3b).

Major planning accomplishments in 2024 included:

- Nightclubs LDC Amendment
- Wetlands Study and Standards Review

In addition, the following specific activities will be addressed in 2025:

- Major Growth Management Plan (GMP) Update Completion

* * *

EXHIBIT 1

Baseline Conditions & Community Development Goals

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	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	1/1/2025	Change from Previous Year	Community Development Goal
A1	Population Total		253,355	258,583	265,531	275,338	281,053	285,210	291,957	298,878	319,793	325,600	331,300	339,459	8,159	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	46,168	645	
	Multifamily Units				87,564	90,141	91,835	92,241	94,793	97,374	100,496	105,064	108,616	111,212	2,596	
A2	Employment Total		242,412	248,966	256,148	259,112	260,841	264,980	270,846	267,035	288,673	292,241	297,025	300,332	3,307	Increase
	New Growth															
	Office sq. ft.				95,124	143,170	168,675	299,854	334,906	348,980	227,252	483,529	349,320	133,865	(215,455)	
	Retail sq. ft.				230,733	496,882	656,299	428,950	596,643	125,252	244,657	25,797	(38,799)	177,680	216,479	
	Hotel sq. ft.				507	1,291	423	1,217	1,775	2,299	48	523	156	(292)	(448)	
	Indust sq. ft.				1,461,909	641,035	272,541	557,834	2,314,369	1,671,200	604,895	568,669	998,968	679,211	(319,757)	
	Hospital sq. ft.				1,641,654	-	18,019	19,468	-	206,327	24,386	29,982	157,124	-	(157,124)	
B1	Civic sq. ft.				6,289	146,077	665,262	432,868	279,344	80,894	102,843	964,780	19,282	619,425	600,143	Increase
	Population density per sq mile	Population / Acres of City Land Area	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	339,459 88,181 3.85	8,159 11,899 -0.49	
B2a	Non-Residential Intensity	Jobs / Acres of City Land Area	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	300,332 88,181 3.41	3,307 11,899 (0.48)	Increase
B2b	Jobs/Housing Balance	Employment / Resident population	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	300,332 339,459 0.89	3,307 8,159 0.41	Maintain ratio between 1.0 and 1.3.
B3a	Compactness	Miles of City boundary / Sq. Miles of City Land Area	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	323.23 137.7 2.35	38.82 18.6 (0.04)	Decrease ratio
B4	Mixed-use development.	Maintain mix of land uses within Urban and Metropolitan Activity Centers, as provided in GMP Objective 2.1	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024		
		Residential	14%	13%	14%	13%	14%	14%	14%	13%	13%	15%	15%	15%	0%	2045 Min. 15% 2045 Max. 30%
		Office	10%	10%	10%	10%	10%	10%	9%	10%	10%	10%	10%	10%	0%	10% 25%
		Commercial	50%	51%	50%	50%	50%	51%	52%	53%	52%	51%	50%	50%	0%	30% 50%
		Public, Recreational, Institutional	11%	11%	11%	11%	11%	11%	11%	10%	11%	11%	11%	11%	0%	5% 20%
		Hospital	4%	5%	5%	5%	4%	4%	4%	4%	4%	3%	4%	4%	0%	1% 10%
		Industrial	11%	10%	10%	11%	11%	10%	10%	10%	10%	10%	10%	10%	0%	5% 10%
	Mixed-use development.	TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
		Maintain mix of land uses within Mixed Use Corridor, as provided in GMP Objective 2.2	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024		
		Residential				17%	16%	16%	18%	17%	21%	21%	22%	22%	0%	2045 Min. 10% 2045 Max. 20%
		Office				33%	33%	33%	31%	31%	29%	29%	28%	28%	0%	10% 15%
		Commercial				31%	32%	31%	31%	33%	32%	32%	32%	32%	0%	30% 55%
		Public, Recreational, Institutional				6%	6%	6%	6%	3%	2%	2%	2%	2%	0%	5% 20%
		Hospital				2%	2%	2%	1%	2%	2%	2%	2%	2%	0%	1% 8%
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	137,912	(16,451)	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	135,182	(23,420)	
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%	70.66%	0.19%	Monitor trends
		Percent multifamily (annual growth)			1.9%	2.9%	1.9%	-0.2%	0.4%	-0.6%	1.1%	0.7%	0.4%	0.2%	0.25%	
C2	Housing Tenure	Owner-Occupied / Total Occupied = % Owner-Occupied	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 available	49,048 130,037 37.7%	55,097 136,364 40.4%	55,956 141,669 39.5%	Not yet available	-0.9%	Increase

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	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	1/1/2025	Change from Previous Year	Community Development Goal
		Renter-Occupied / Total Occupied = % Renter-Occupied	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%	85,713 141,669 60.5%	Not yet available	0.9%	
C3	Affordable Housing Ownership	Median home sales price / Average household income for family of four	\$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	\$360,000 \$90,400 3.98	-\$10,500 \$4,700 (0.34)	Maintain ratio less than 2.7
D1a	Pedestrian Access	Miles of sidewalk	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	Aug. 1, 2024 (CAR) 1179	79	Add 4 miles per year.
D1b	Miles of bike infrastructure		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	325	11	Build 20 miles between 2010 and 2014.
D1c	Miles of Transit Corridors		155.8	155.8	155.8	155.8	156.5	156.5	156.5	156.5	156.5	156.4	156.4	156.4	0	Increase
D2a	Walkscore			39	39	41	42	42	41	41	41	41	41	41	0	Increase
D2b	Bikescore			52	53	53	53	55	60	60	57	57	57	57	0	Increase
D3	VMT (County) per person per day		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	46,357,045	Not yet available	6.7%	Decrease
D4	Work commute Mode split		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%	Drive Alone 68.3%, Carpool 8.8%, Transit 1.6%, Walk 2.0%, Other 1.8%, Work Home 17.4%	Not yet available	Drive Alone +1.6%, Carpool -0.4%, Transit -0.7%, Walk -0.7%, Other 0%, Work Home +0.2%	Transit 5% or more
E1	Conservation	Acres of Conservation in City / Total acres in City	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%	15,578 88,181 17.7%	3201 11,899 1.5%	20% open space, of which at least 10% conservation.
E2	Parks	Acres of Parks in City / Population	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%	2,162 339,459 6.37%	1 8,159 -0.15%	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.	76,000	79,000	80,000	79,000	82,000	80,000	78,000	80,000	78,000	75,000	76,000	75,000	-1,000	Decrease
	* Figures obtained from OUC Annual Report.	Data is system wide (not City-specific).	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*	as of September 30, 2024*	1.3%	

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	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	1/1/2025	Change from Previous Year	Community Development Goal
E3b	Per household energy consumption	Annual average residential electric consumption (per household) in KWH.	11,134	11,488	11,760	11,999	11,378	11,570	11,696	11,727	11,534	11,312	11,383	11,107	-276	Decrease
	* Figures obtained from OUC Annual Report.	Data is system wide (not City-specific).	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*	as of September 30, 2024*	2.5%	

Source: City of Orlando Economic Development Department, City Planning Division April 2025