
GROWTH MANAGEMENT PLAN INDICATORS

2022 ANNUAL REPORT

(January 1, 2022– December 31, 2022)

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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

2022 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 2022

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 2022, population is 330,964, and it grew by 11,171 since last year. The previous year (2021) estimate 319,793 was adjusted to coincide with the 2022-2050 Growth Projections Report.

New development consists of:

- 440 single family units
- 4,568 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 2022, employment is 292,241. The previous year (2021) estimate 288,673 was adjusted to coincide with the 2022-2050 Growth Projections Report.

New development consists of:

- 25,797 sq. ft. commercial
- 483,529 sq. ft. office
- 523 hotel rooms
- 568,669 sq. ft. industrial
- 29,982 sq. ft. hospital
- 964,780 sq. ft. civic

3. PROJECTS COMPLETED

The following large-scale projects received a certificate of occupancy during calendar year 2022. 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	
Marriott Townplace Suites	BLD2018-17860	5530 Butler National Dr.	157 hotel rooms	
Republic Square Apartments	BLD2019-16494	7428 Universal Blvd.	113 du	210 du
	BLD2019-16495	7458 Universal Blvd.	97 du	
Marriott Townplace Suites at Grand National	BLD2018-14066	5433 Altamira Dr.	153 hotel rooms & 1,425 sq. ft. retail	
Addison at Gateway Apartments	BLD2019-16124	7320 North Frontage Rd.	42 du	295 du
	BLD2019-16125	7284 North Frontage Rd.	42 du	
	BLD2019-16235	7200 North Frontage Rd.	50 du	
	BLD2019-16271		50 du	
	BLD2019-16126	7224 North Frontage Rd.	37 du	
	BLD2019-16128	7236 North Frontage Rd.	37 du	
	BLD2019-16127	7248 North Frontage Rd.	37 du	
Orlando International Airport South Terminal C	BLD2017-12482	10300 Jeff Fuqua Blvd.	736,366 sq. ft. civic (airport)	
The Yard at Ivanhoe	BLD2016-06000	1618 Alden Rd.	591 du & 9,294 sq. ft. retail	
Tyson Road Storage	BLD2020-16922	12915 Narcoossee Rd.	85,050 sq. ft. Industrial (personal storage)	
Radius Apartments	BLD2018-15101	355 N. Rosalind Ave.	389 du & 14,000 sq. ft. retail	

Millenium MetroWest	BLD2019-17280	6808 Piazza Grande Ave.	32 du	288 du
	BLD2019-17279	6860 Piazza Grande Ave.	22 du	
	BLD2019-17229	6886 Piazza Grande Ave.	42 du	
	BLD2019-17281	6918 Piazza Grande Ave.	42 du	
	BLD2019-17282	6936 Piazza Grande Ave.	22 du	
	BLD2019-17283	6954 Piazza Grande Ave.	32 du	
	BLD2019-17286	6891 Piazza Grande Ave.	32 du	
	BLD2019-17284	6919 Piazza Grande Ave.	32 du	
	BLD2019-17284	6905 Piazza Grande Ave.	32 du	
Orange & Robinson Apartments	BLD2019-16666	342 N. Orange Ave.	369 du & 3,822 sq. ft. retail	
Dr. Phillips Phase II	BLD2015-06168	445 S. Magnolia Ave.	221,824 sq. ft. civic	
Orlando Magic Training Facility	BLD2020-13732	25 S. Terry Ave.	139,706 sq. ft. office	
Modera Creative Village	BLD2019-17032	505 Chatham Ave.	292 du & 10,597 sq. ft. retail	
Storey Park – Urbon at Lake Nona	BLD2019-22389	9200 Moss Preserve Pkwy	8 du	144 du
	BLD2020-15382	9208 Moss Preserve Pkwy	24 du	
	BLD2020-15380	9224 Moss Preserve Pkwy	64 du	
	BLD2020-15383	9296 Moss Preserve Pkwy	24 du	
	BLD2020-15384	9304 Moss Preserve Pkwy	24 du	
Lego Building @ Health Village	BLD2020-15843	265 E. Rollins St.	323,681 sq. ft. office	
The Hudson at MetroWest Apartments	BLD2021-10966	460 S. Kirkman Rd.	30 du	220 du
	BLD2021-10965	456 S. Kirkman Rd.	40 du	
	BLD2021-10963	472 S. Kirkman Rd.	30 du	
	BLD2021-10962	484 S. Kirkman Rd.	30 du	
	BLD2021-10961	500 S. Kirkman Rd.	30 du	
	BLD2021-10960	508 S. Kirkman Rd.	30 du	
	BLD2021-10959	512 S. Kirkman Rd.	30 du	
Alta at Health Village Apartments	BLD2019-18200	2680 N. Orange Ave.	285 du & 1,116 sq. ft. retail	
Lake Nona Town Center Office	BLD2020-17812	13495 Veterans Way	68,350 sq. ft. office & 2,600 sq. ft. retail (bank & restaurant)	
Conway Logistics Center	BLD2020-20318	4840 Hoffner Ave.	107,662 sq. ft. industrial	

Princeton Oaks Building 800	BLD2019-20278	3851 W. D. Judge Dr.	97,200 sq. ft. industrial	
Maifly Narcoossee Apartments	BLD2021-10076	6404 Narcoossee Rd.	40 du	240 du
	BLD2021-10075	6408 Narcoossee Rd.	40 du	
	BLD2021-10074	6428 Narcoossee Rd.	40 du	
	BLD2021-10073	6432 Narcoossee Rd.	40 du	
	BLD2021-10072	6436 Narcoossee Rd.	40 du	
	BLD2021-10071	6440 Narcoossee Rd.	40 du	
The Wave Hotel	BLD2018-13949	6100 Wave Hotel Dr.	213 du, 26,544 sq. ft. office & 5,023 sq. ft. retail	
Princeton Oaks Building 600	BLD2019-20276	3475 W.D. Judge Dr.	97,200 sq. ft. industrial	
Silver Hills Apartments	BLD2020-11110	5801 Lakehurst Dr.	346 du	
Encore Metro at Millenia	BLD2018-22877	2437 Americana Blvd.	65 du	215 du
	BLD2018-22878	2441 Americana Blvd.	48 du	
	BLD2018-22879	2433 Americana Blvd.	48 du	
	BLD2018-22478	2429 Americana Blvd.	54 du	
Princeton Oaks Building 700	BLD2019-20277	3827 W. D. Judge Dr.	86,400 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 2022. 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
MetroWest Westgate Apts.	MPL2021-10070	5712 Westgate Dr.	258 du
Lee Vista Business Park	MPL2021-10077	5827 Conway Rd.	2.6 million sq. ft. industrial warehouse
AdventHealth Medical Facility	MPL2021-10076	4655 Vineland Rd.	340,550 sq. ft. medical facility
Narcoossee Distribution Warehouse	MPL2021-10075	6520 Narcoossee Rd.	177,000 sq. ft. warehouse
Princeton Commons	ZON2021-10014	1924 W. Princeton St.	600 du & 10,000 sq. ft. office
McCoy Eagle	ZON2021-10025	7963 & 8081 Narcoossee Rd.	600 du, 135,500 sq. ft. retail, 22,500 sq.

			ft. office & 140 hotel rooms
	MPL2021-10071		329 du
Vive at Eola	MPL2021-10048	101 & 205 S. Eola Dr.	144 du
Urban Square Apartments	MPL2021-10039	1625 & 1663 Mercy Dr.	229 du
Princeton Commons	ZON2021-10014	1924 W. Princeton St.	600 du & 10,000 sq. ft. office
Judge Meadow Apartments	MPL2021-10072	S of Judge Rd., E of Conway Rd., N of McCoy Rd. & W of S. Semoran Blvd.	444 du
Twelve Oaks at Hoffner	MPL2022-10001	4703, 4739 & 4801 Hoffner Ave.	344 du
Lee Vista/Ambrose Parcels 1 & 3	MPL2022-10010	7150 Lee Vista Blvd. & 6708 Hazeltine National Dr.	937,500 sq. ft. warehouse
	MPL2022-10014		1,515,600 sq. ft. warehouse
Lee Vista Warehouse Parcel 2	MPL2022-10011	7533 Lee Vista Blvd.	294,700 sq. ft. warehouse
Lee Vista Warehouse Parcel 4	MPL2022-10015	NE corner of Emerald Dunes Dr. & Hazeltine National Dr.	219,700 sq. ft. warehouse
Bainbridge Universal Apartments	MPL2022-10013	7575 Universal Blvd.	367 du
Starwood High School	MPL2022-10017	NW corner of Dowden Rd. & Founders St.	400,000 sq. ft. civic (high school)
AC Hotel Orlando Gateway	MPL2022-10005	5560 Gateway Village Cir.	155 hotel rooms
Lake Nona PD	ZON2022-10006	S of Dowden Rd., W of Narcoossee Rd., E of OIA & N of Boggy Creek Rd.	20,817 du 24,982,926 sq. ft. non-residential uses 3,658 hotel rooms
Meridian Parks N-4 & N-5	MPL2022-10007	E of Dowden Rd., S of SR 528 & N of Wewahootee Rd.	238 du
AIPO Warehouse T.52	MPL2022-10023	10990 Boggy Creek Rd.	342,720 sq. ft. warehouse
Modera Baldwin Park	MPL2022-10025	740 Bennett Rd.	400 du
W. Princeton & Mercy Apartments	MPL2022-10027	2200 Mercy Dr. & 4048 W. Princeton St.	400 du
Gardens on Millenia Parcel K	MPL2022-10030	3692 Cathy St.	144,450 sq. ft. warehouse
AIPO T-7 Warehouse	MPL2022-10034	901 Mid Florida Dr.	167,000 sq. ft. warehouse
520 E. Church St. PD Phase 2	MPL2022-10035	550 Mariposa St.	223 du & 19,412 sq. ft. retail
International Drive Luxury Apartments	MPL2022-10041	6603 International Dr.	329 du

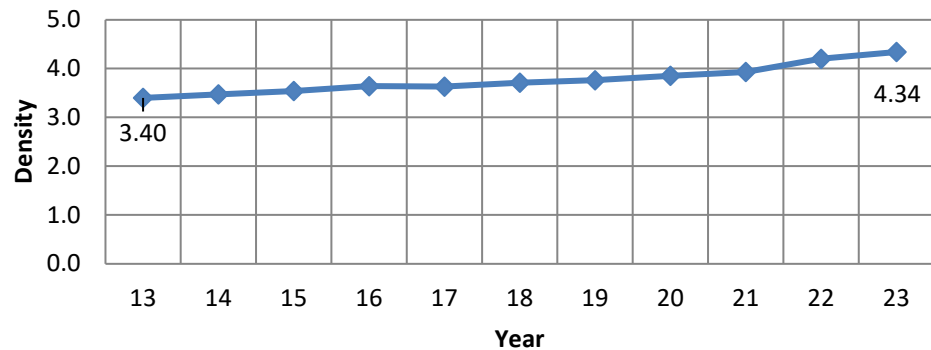
McCoy Rd. Warehouses Phase II	MPL2022-10008	8200 McCoy Rd.	192,125 sq. ft. & 30,800 sq. ft. warehouses
Vista Park Phases 2 & 3	MPL2022-10040	S of Econolockhatchee Trl, E of Passaic Pkwy, N of SR 528 & W of SR 417	723 du
Ambassador Hotel Conversion	ZON2022-10016	929 W. Colonial Dr.	150 du
Vista Commerce Park	MPL2022-10052	8113 Vista Reserve Blvd.	818,600 sq. ft.
West Kaley Mixed Use	ZON2022-10023	415 W. Kaley St.	856 du
Parkwood Apartments	MPL2022-10028	3321 W. Colonial Dr.	300 du
924 N. Magnolia – Mixed Use Project	MPL2022-10053	924 N. Magnolia Ave.	386 du
Millenial Moments Orlando Adult Living Apartments	MPL2022-10058	4530 Vineland Rd	178 du, 72 assisted living units, 32 memory care units
One Nona Plaza	ZON2022-10022	12575 Narcoossee Rd.	272 du
Rosearts Phase 1	MPL2022-10051	5155 Rosamond Dr.	1,594 du 150,000 sq. ft. retail/office
110 W. Jefferson Mixed Use	MPL2022-10065	110 W. Jefferson St.	555 du 40,895 sq. ft. office 20,000 sq. ft. retail
Lakehurst Apartments	MPL2022-10066	5850 Lakehurst Dr.	358 du
Camden Grand Resort Apartments	MPL2022-10068	7050 S. Kirkman Rd.	325 du
Mission Pointe II	ZON2022-10017	12525 & 12569 Narcoossee Rd.	176 du 29,700 sq. ft. retail
Torrey Preserve	MPL2022-10071	8901 Narcoossee Rd.	280 du
Orlando Gateway Apartments	MPL2022-10009	SW of Shadowridge Dr., N of McCoy Rd., E of Conway Rd.	871 du
Narcoossee Multi-Family PD	ZON2022-10028	7525 Narcoossee Rd.	112 du
Storey Park	MPL2022-10073	11351 Biography Way	300 du
The Commons	MPL2022-10079	191 S. Rosalind Ave.	400 du 100,000 sq. ft. office 8,238 sq. ft. retail
OSLO at I-Drive Apartments	MPL2022-10093	6323 International Dr.	223 du
2 nd Wave Apartments	MPL2022-10019	11747 Narcoossee Rd.	337 du
Sunstone Park at Lake Nona	MPL2022-10036	NW of Sunstone Ave. & Tyson Rd.	65,240 sq. ft. office/retail
Lake Nona Mid-Town Multi-Family	MPL2022-10012	7042 Lake Nona Blvd. & 9301 Tavistock Lakes Blvd.	627 du 26,104 sq. ft. retail
1801 Prospect Ave.	MPL2022-10098	1801 Prospect Ave.	230 du

B. SMART GROWTH INDICATORS

1. RESIDENTIAL DENSITY

“The City shall achieve a compact urban form by maintaining the highest average density and intensity of development in Central Florida.” - GMP Future Land Use Element Objective 1.3

Resident Population / Acres of City Land Area



Population per acre was determined by dividing the City’s population by the sum of the total land area in the City. The City’s population has increased by 11,171 persons since last year and 88,056 in the last 10 years. City land area has increased 134 acres since last year and 4,758 acres in the last 10 years.¹

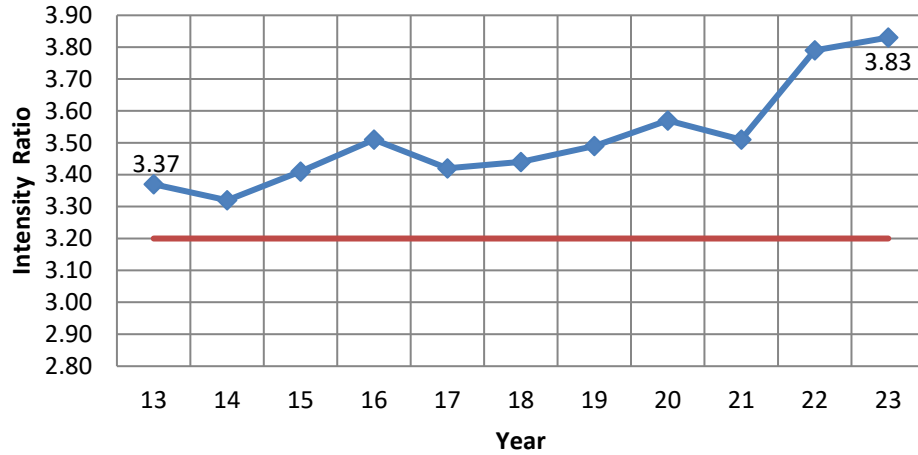
This increase is consistent with the City’s goal to increase residential density. Residential density is expected to rise in the next five years as recently annexed property is developed and downtown redevelopment continues.

¹ Note: Acres of land in the City on January 1, 2023, was calculated as acres of land in the City on January 1, 2022 (76,113) plus acres of land annexed in 2022 (134). The result (76,247) is higher than the acreage calculated using the City GIS system (76,161), 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

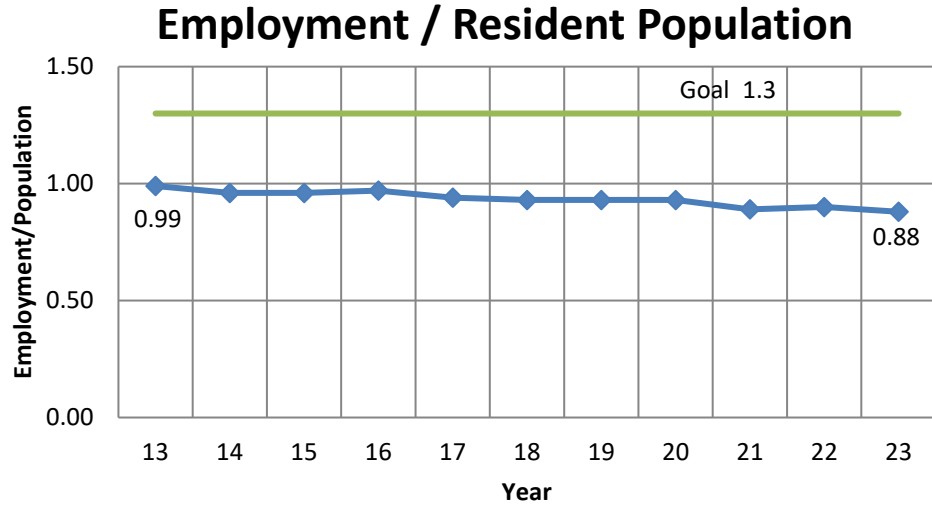
Jobs / Acres of City Land Area



3.2	3.37	3.83	Yes
Goal	2013	2023	Achieved?

Non-Residential Intensity is measured as jobs per acre of City land area. The City gained 3,568 jobs since last year and has gained 51,402 jobs since 2013. The City land area has increased by 134 acres since last year and 4,758 acres in the last 10 years. The current ratio of 3.83 exceeds the City's goal to increase the ratio from 3.07 to 3.2 by 2009. Staff will evaluate creating a new goal for future annual reports.

B) JOBS TO HOUSING RATIO



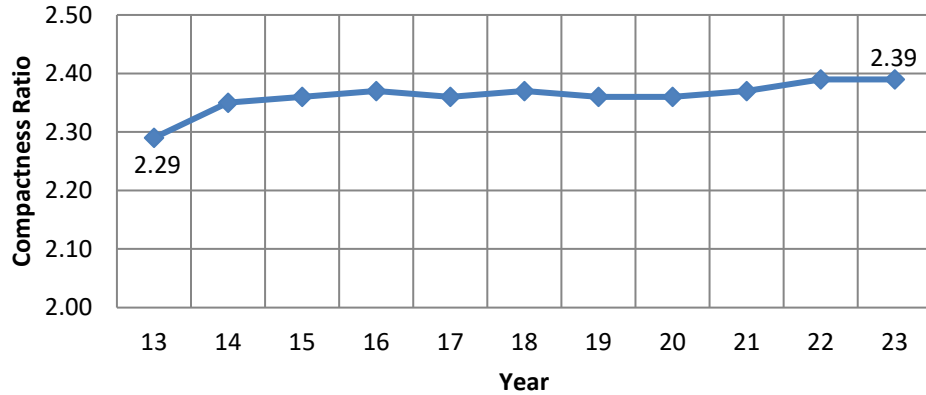
1.02 - 1.3	1.02	0.88	No
Goal	Baseline	2023	Achieved?

Jobs/Housing Balance is measured as a ratio of employment over resident population. The City gained 3,568 jobs since last year and has gained 51,402 jobs since 2013. The resident population increased by 11,171 persons since last year and 88,056 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 of the lingering effects COVID-19 pandemic where 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 0.88 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	2013	2023	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 134 acres during the past year. The City boundary in miles increased by 0.01 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%	51%	No
PRI	5 - 20%	11%	Yes
Hosp.	1 - 10%	3%	Yes
Ind.	5 - 10%	10%	Yes
Use	GMP Goal	2022	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%	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
Use	GMP Goal	2022	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 2022, the mix of uses within Urban and Metropolitan Activity Centers fell within the target range for residential, office, hospital, public and industrial. The percentage of residential use was on target for 2045 for the first time this year. The percentage of commercial use was about 1% 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 2022, 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	152,999	46%	158,240	54%
Future Corridors	18,676	6%	22,181	8%

The total City population is 330,964. Approximately 52% live within ¼ mile of an existing or future transit corridor. The total employment is 292,241. Approximately 62% of employment centers are within ¼ mile of an existing or future transit corridor.

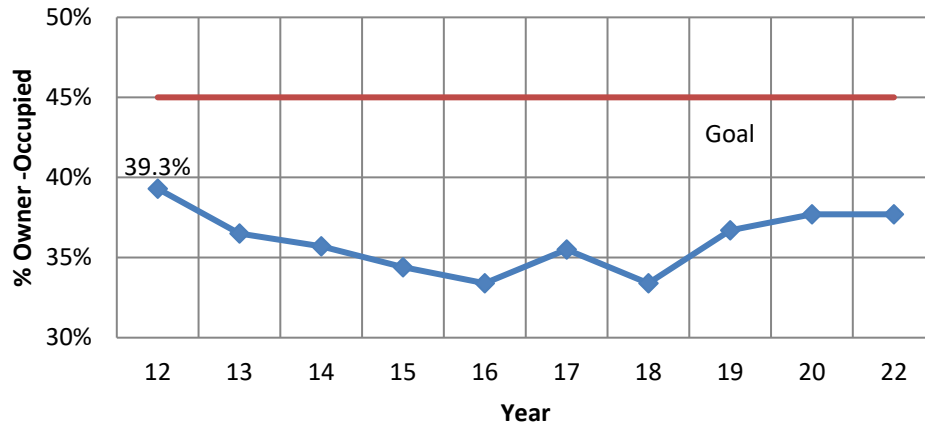
C. HOUSING INDICATORS

1. HOUSING MIX

The Housing Mix is measured by the total number of existing units, both single family and multi-family. The total number of single-family units is 44,776 units and the number of multi-family is 105,064 units. The percentage of existing multi-family units is 70%. The annual growth rate of multi-family is 0.7%. This growth can be attributed to the City's growing population and employment base.

2. HOUSING TENURE

Owner-Occupied Dwelling Units



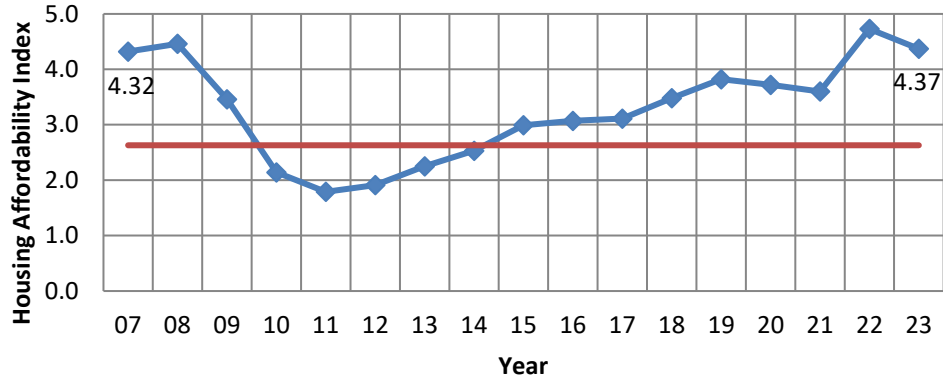
45%	43.1%	37.7%	No
Goal	2012	2022	Achieved?

According to the City Land Use Database there are 149,840 housing units in the City of Orlando at the end of 2022, of which 44,776 are single family units and 105,064 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 2021 ACS has been released and it is reported that the City of Orlando has an estimate of 130,037 housing units are occupied. Of that number, 49,048 units (37.7%) are owner-occupied and 80,989 units (62.3%) are renter-occupied. The percentage of owner-occupied and renter occupied has remained the same since the 2020 Indicators Report in which this data was last released.

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	4.37	No
Goal	Baseline	2023	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 2022 was \$350,000. This figure is \$15,000 more than last year and is the highest recorded from any Indicators Report. The median income for a family of four in Orange County increased from \$70,800 in 2021 to \$80,100 in 2022. This figure has increased by \$9,300 since last year and is a \$22,700 increase since 2007.

The City’s housing affordability goal is a ratio of 2.63. The City’s actual ratio for 2022 was 4.73 and as of January 1, 2023 it is 4.37. This figure is 0.36 less 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, 2023 Statistics at a Glance, February 9, 2023, <https://www.orlandorealtors.org/marketreports>

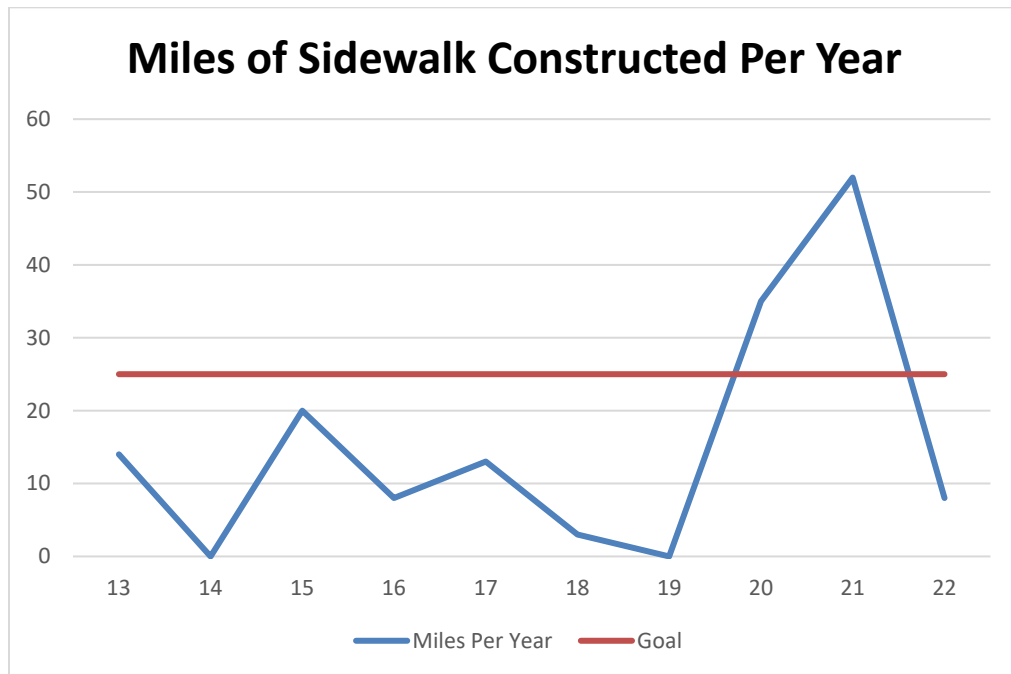
³ U.S. Department of Housing and Urban Development, FY2022 Median Family Income Documentation System, Orlando-Kissimmee, FL MSA Results. <https://www.huduser.gov/portal/datasets/il/il2022/2022summary.odn>

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	8	No
Goal	2022	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, 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
- 1,100 miles on August 1, 2022

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 8 new miles of sidewalks were constructed by Public Works during 2022. 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

According to the City's Transportation Department, between July 1, 2021 and June 30, 2022, there were some changes made to the bicycle network which resulted in reduced mileage from last year. The City of Orlando currently has 310 miles of bikeways. In 2022, bikeways include:

Bike Paths:	80 miles
Bike Lanes:	186 miles
<u>Signed Routes:</u>	<u>44 miles</u>
TOTAL:	310 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. 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.

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 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 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, 2022, the vehicles miles traveled in Orange County was 39,970,276. This is a decrease from last year by 366,493 or 8.1%. This decrease is most likely due to some employees working from home.

4. MODE CHOICE

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

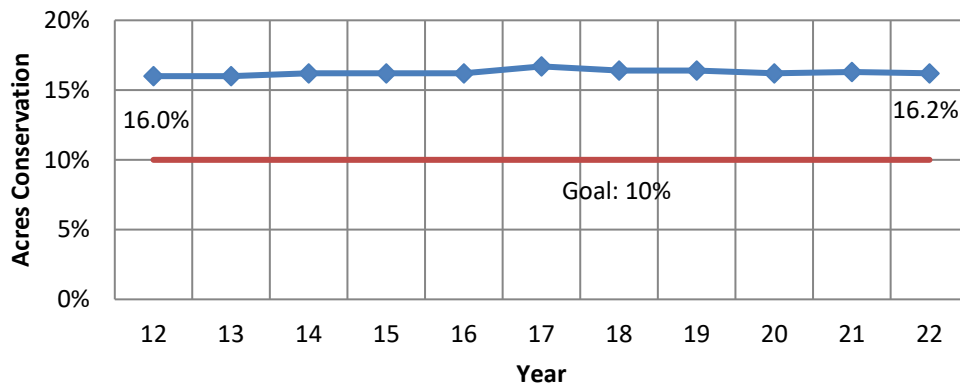
According to the 2021 ACS data for the City of Orlando, of the 161,820 workers that travel to work, 68.2% drive a vehicle alone, 7.6% carpool, 1.1% use transit, 1.0% walk to work and 19.1% work from home. Those that chose to use transit decreased by 0.4% from 2020, and those who work from home increased by 12.3% due to the trends after the pandemic.

E. ENVIRONMENTAL INDICATORS

1. CONSERVATION ACREAGE

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

Acres of Conservation in City / Total Acres in City



10%	10.8%	16.2%	Yes
Goal	Baseline	2022	Achieved?

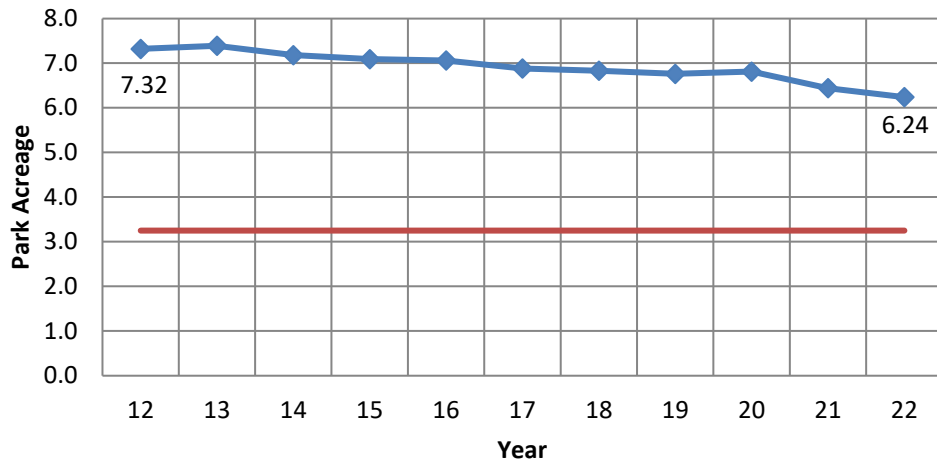
There is currently no accurate way to estimate all open space inside City limits. Open space may occur in any zoning district, may be publicly or privately owned, and may or may not be protected from future development. The next best option is to identify the amount of land that is designated as Conservation 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 134 acres during the past year. Conservation acreage is calculated using future land use designations rather than zoning. The amount of Conservation area in the City has increased 5 acres since last year. Based on these figures, 16.2% of the City land area is Conservation. This figure exceeds the City’s goal of at least 10% Conservation use.

2. PARK ACREAGE

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

Park Acreage/ Population

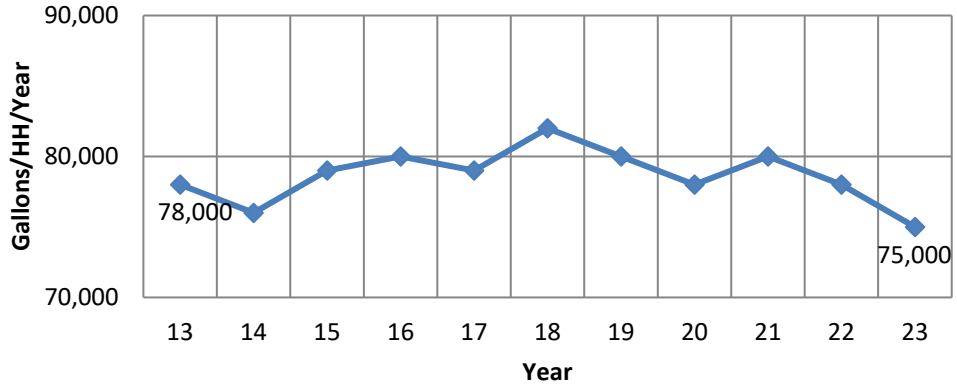


Parks level of service is measured as a ratio of acreage over resident population. The City has 2,066 acres of parks and added 271 acres since 2013. The resident population increased by 11,171 persons since last year and 88,056 persons in the last 10 years. Based on these figures, the City's parks ratio is above the required LOS by 2.99 acres per thousand population. There is currently a surplus of 1,018 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 in Lake Nona's Laureate Park, Pinewood Reserve and Storey Park. In the coming years, the increase will come from the Packing District with the new tennis center, Meridian Park Community Park and Poitras Park.

3. WATER & ENERGY CONSUMPTION

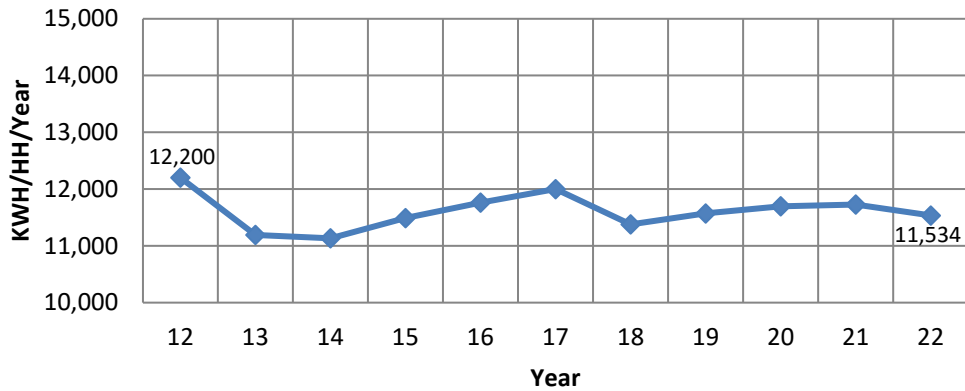
“The City shall reduce total per household potable water demand by an additional 3 percent between 2017 and 2020, and an additional 4 percent by 2040, from a baseline in 2017 of 79,000 gallons per household per year.” - GMP Potable Water Element Objective 1.2.

Annual Average Residential Water Consumption



↓	79,000	75,000	Yes
Goal	2017 Baseline	2023	Achieved?

Annual Average Residential Electric Consumption



↓	12,301	11,312	Yes
Goal	Baseline	2023	Achieved?

Water and electric consumption figures were obtained from Orlando Utilities Commission (OUC). Current data indicates that per household water consumption decreased by 3,000 gallons or 3.9% when compared to last year and when compared to the 2013 condition. Data also indicates that energy consumption has decreased by 1.9% when compared to last year and decreased by 8.0% 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 2022, the City of Orlando:

- Met its community development goals for residential and non-residential density (B1), jobs per acre (B2a), transit access (B5), 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) and number of new sidewalks (D1a).

Major planning accomplishments in 2022 included:

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

In addition, the following specific activities will be addressed in 2023:

- Evaluation & Appraisal Report
- EAR-based amendments
- Signage LDC Amendments
- Wetlands Study and Standards Review

* * *

EXHIBIT 1

Baseline Conditions & Community Development Goals

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	1/1/2019	1/1/2020	1/1/2021	1/1/2022	1/1/2023	Change from Previous Year	Community Development Goal	
A1	Population Total		242,908	253,355	258,583	265,531	275,338	281,053	285,210	291,957	298,878	319,793	330,964	11,171	376,110 projected by 2045	
	Single Family Units					40,964	41,444	41,977	42,429	43,102	43,752	44,336	44,776	440		
	Multifamily Units					87,564	90,141	91,835	92,241	94,793	97,374	100,496	105,064	4,568		
A2	Employment Total		240,839	242,412	248,966	256,148	259,112	260,841	264,980	270,846	267,035	288,673	292,241	3,568	Increase	
	New Growth															
	Office sq. ft.					95,124	143,170	168,675	299,854	334,906	348,980	227,252	483,529	256,277		
	Retail sq. ft.					230,733	496,882	656,299	428,950	596,643	125,252	244,657	25,797	(218,860)		
	Hotel sq. ft.					507	1,291	423	1,217	1,775	2,299	48	523	475		
	Indust sq. ft.					1,461,909	641,035	272,541	557,834	2,314,369	1,671,200	604,895	568,669	(36,226)		
	Hospital sq. ft.					1,641,654	-	18,019	19,468	-	206,327	24,386	29,982	5,596		
	Civic sq. ft.					6,289	146,077	665,262	432,868	279,344	80,894	102,843	964,780	861,937		
B1	Population density per sq mile	Population / Acres of City Land Area	242,908 71,489 3.40	253,355 72,990 3.47	258,583 73,042 3.54	265,531 73,045 3.64	275,338 75,842 3.63	281,053 75,861 3.71	285,210 75,900 3.76	291,957 75,906 3.85	298,878 76,020 3.93	319,793 76,113 4.20	330,964 76,247 4.34	11,171 134 0.14	Increase	
B2a	Non-Residential Intensity	Jobs / Acres of City Land Area	240,839 71,489 3.37	242,412 72,990 3.32	248,966 73,042 3.41	256,148 73,045 3.51	259,112 75,842 3.42	260,841 75,861 3.44	264,980 75,900 3.49	270,846 75,906 3.57	267,035 76,020 3.51	288,673 76,113 3.79	292,241 76,247 3.83	3,568 134 0.04	Increase	
B2b	Jobs/Housing Balance	Employment / Resident population	240,839 242,908 0.99	242,412 253,355 0.96	248,966 258,583 0.96	256,148 265,531 0.97	259,112 275,338 0.94	260,841 281,053 0.93	264,980 285,210 0.93	270,846 291,957 0.93	267,035 298,878 0.89	288,673 319,793 0.90	292,241 330,964 0.88	3,568 11,171 0.32	Maintain ratio between 1.0 and 1.3.	
B3a	Compactness	Miles of City boundary / Sq. Miles of City Land Area	256.13 111.7 2.29	268.00 114.0 2.35	269.71 114.1 2.36	270.00 114.0 2.37	279.88 118.4 2.36	279.36 118.0 2.37	279.95 118.5 2.36	279.95 118.5 2.36	281.40 118.6 2.37	284.28 118.8 2.39	284.29 119.0 2.39	0.01 0.2 0.00	Decrease ratio	
B4	Mixed-use development.	Maintain mix of land uses within Urban and Metropolitan Activity Centers, as provided in GMP Objective 2.1	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022			
		Residential	14%	14%	13%	14%	13%	14%	14%	14%	13%	13%	15%	2%	2045 Min. 15% 2045 Max. 30%	
		Office	10%	10%	10%	10%	10%	10%	10%	9%	10%	10%	10%	0%	10% 25%	
		Commercial	50%	50%	51%	50%	50%	50%	51%	52%	53%	52%	51%	-1%	30% 50%	
		Public, Recreational, Institutional	11%	11%	11%	11%	11%	11%	11%	11%	10%	11%	11%	0%	5% 20%	
		Hospital	4%	4%	5%	5%	4%	4%	4%	4%	4%	4%	3%	-1%	1% 10%	
		Industrial	11%	11%	10%	10%	11%	11%	10%	10%	10%	10%	10%	0%	5% 10%	
		TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%			
	Mixed-use development.	Maintain mix of land uses within Mixed Use Corridor, as provided in GMP Objective 2.2	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022			
		Residential					17%	16%	16%	18%	17%	21%	21%	0%	2045 Min. 10% 2045 Max. 20%	
		Office					33%	33%	33%	31%	31%	29%	29%	0%	10% 15%	
		Commercial					31%	32%	31%	31%	33%	32%	32%	0%	30% 55%	
		Public, Recreational, Institutional					6%	6%	6%	6%	3%	2%	2%	0%	5% 20%	
		Hospital					2%	2%	2%	1%	2%	2%	2%	0%	1% 8%	
		Industrial					11%	11%	12%	13%	14%	14%	14%	0%	5% 15%	
		TOTAL					100%	100%	100%	100%	100%	100%	100%			
B5	Transit Access	Population within 1/4 mile of Transit Corridor Employment within 1/4 mile of Transit Corridor			116,883 154,053	117,614 155,403	95,030 94,664	88,411 78,227	Note: Data updated with Transit Corridor update		153,944 166,762	144,264 155,054	148,281 156,776	152,999 158,240	4,718 1,464	Increase
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%		Monitor trends	

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	1/1/2019	1/1/2020	1/1/2021	1/1/2022	1/1/2023	Change from Previous Year	Community Development Goal
		Percent multifamily (annual growth)				1.9%	2.9%	1.9%	-0.2%	0.4%	-0.6%	1.1%	0.7%	0.25%	
C2	Housing Tenure	Owner-Occupied / Total Occupied = % Owner-Occupied	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 available	49,048 130,037 37.7%	Not yet available	1.0%	Increase
		Renter-Occupied / Total Occupied = % Renter-Occupied	65,139 102,564 63.5%	66,480 103,466 64.3%	71,952 109,685 65.6%	74,006 111,100 66.6%	69,981 108,523 64.5%	71,674 107,590 66.6%	72,316 114,176 63.3%	68,215 109,454 62.3%	Not available	80,989 130,037 62.3%	Not yet available	-1.0%	
C3	Affordable Housing Ownership	Median home sales price / Average household income for family of four	\$129,000 \$57,400 2.25	\$148,000 \$58,500 2.53	\$164,000 \$54,800 2.99	\$178,788 \$58,300 3.07	\$180,000 \$57,800 3.11	\$203,000 \$58,400 3.48	\$225,000 \$58,976 3.82	\$242,000 \$65,118 3.72	\$245,000 \$68,100 3.60	\$335,000 \$70,800 4.73	\$350,000 \$80,100 4.37	\$15,000 \$9,300 (0.36)	Maintain ratio less than 2.7
D1a	Pedestrian Access	Miles of sidewalk	Aug. 1, 2012 (CAR) 947	Aug. 1, 2013 (CAR) 961	Aug. 1, 2014 (CAR) 961	Aug. 1, 2015 (CAR) 981	Aug. 1, 2016 (CAR) 989	Aug. 1, 2017 (CAR) 1002	Aug. 1, 2018 (CAR) 1005	Aug. 1, 2019 (CAR) 1005	Aug. 1, 2020 (CAR) 1040	Aug. 1, 2021 (CAR) 1092	Aug. 1, 2022 (CAR) 1100	8	Add 4 miles per year.
D1b	Miles of bike infrastructure		293.2	317.6	317.6	322.4	338.8	361.5	363.5	364.2	368.9	370.5	310 Note: Change from previous year changes to bike network	-60.5	Build 20 miles between 2010 and 2014.
D1c	Miles of Transit Corridors		155.8	155.8	155.8	155.8	155.8	156.5	156.5	156.5	156.5	156.5	156.4	-0.1	Increase
D2a	Walkscore				39	39	41	42	42	41	41	41	41	0	Increase
D2b	Bikescore				52	53	53	53	55	60	60	57	57	0	Increase
D3	VMT (County) per person per day		34,099,958	34,904,854	36,389,540	37,201,259	39,723,296	41,752,084	42,527,605	43,869,910	40,336,769	39,970,276	Not yet available	-0.9%	Decrease
D4	Work commute Mode split		Drive Alone 79.3%, Carpool 8.6%, Transit 5%, Walk 1.8%, Other 2.2%, Work Home 3.1%	Drive Alone 79%, Carpool 8%, Transit 4.6%, Walk 1.9%, Other 2%, Work Home 4.5%	Drive Alone 77.3%, Carpool 10.6%, Transit 3.9%, Walk 1.6%, Other 1.6%, Work Home 5%	Drive Alone 79.6%, Carpool 6.6%, Transit 5.3%, Walk 1.3%, Other 2.3%, Work Home 4.9%	Drive Alone 79.1%, Carpool 8.2%, Transit 4.5%, Walk 1.8%, Other 1.9%, Work Home 4.5%	Drive Alone 76.0%, Carpool 7.8%, Transit 4.3%, Walk 2.7%, Other 3.2%, Work Home 6.0%	Drive Alone 82.2%, Carpool 8.4%, Transit 2.8%, Walk 1.2%, Other 1.7%, Work Home 3.6%	Drive Alone 76.7%, Carpool 10.3%, Transit 1.5%, Walk 1.5%, Other 3.2%, Work Home 6.8%	Not available	Drive Alone 68.2%, Carpool 7.6%, Transit 1.1%, Walk 1.0%, Other 3.0%, Work Home 19.1%	Not yet available	Drive Alone -8.5%, Carpool -2.7%, Transit -0.4%, Walk -0.5%, Other -0.2%, Work Home +12.3%	Transit 5% or more
E1	Conservation	Acres of Conservation in City / Total acres in City	11,405 71,489 16.0%	11,797 72,990 16.2%	11,854 73,042 16.2%	11,854 73,045 16.2%	12,687 75,842 16.7%	12,441 75,861 16.4%	12,427 75,900 16.4%	12,419 75,906 16.4%	12,334 76,020 16.2%	12,367 76,113 16.3%	12,372 76,247 16.2%	5 134 -0.1%	20% open space, of which at least 10% conservation.
E2	Parks	Acres of Parks in City / Population	1,795 242,908	1,818 253,355	1,833 258,583	1,875 265,531	1,893 275,338	1,919 281,053	1,929 285,210	1,988 291,957	2,034 298,878	2,058 319,793	2,066 330,964	8 11,171	At least 3.25 acres per 1,000 population.

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	1/1/2019	1/1/2020	1/1/2021	1/1/2022	1/1/2023	Change from Previous Year	Community Development Goal
			7.39%	7.18%	7.09%	7.06%	6.88%	6.83%	6.76%	6.81%	6.81%	6.44%	6.24%	-0.20%	
E3b	Per household water consumption * Figures obtained from OUC Annual Report.	Annual average residential water consumption (per household) in gallons per year. Data is system wide (not City-specific).	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*	75,000 as of September 30, 2022*	-3,000 -3.9%	Decrease
E3b	Per household energy consumption * Figures obtained from OUC Annual Report.	Annual average residential electric consumption (per household) in KWH. Data is system wide (not City-specific).	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*	11,312 as of September 30, 2022*	-222 -1.9%	Decrease

Source: City of Orlando Economic Development Department, City Planning Division March 2023