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# GROWTH MANAGEMENT PLAN INDICATORS

## 2020 ANNUAL REPORT

(January 1, 2020– December 31, 2020)

*March 1, 2021*



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

### 2020 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 2020**

##### **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 2020, population is 298,878, and it grew by 6,921 since last year.

New development consists of:

- 650 single family units
- 2,581 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 2020, employment is 267,035.

New development consists of:

- 66,639 sq. ft. commercial
- 348,980 sq. ft. office

- 2,299 hotel rooms
- 1,671,200 sq. ft. industrial
- 206,327 sq. ft. hospital
- 80,894 sq. ft. civic

### 3. PROJECTS COMPLETED

The following large scale projects received a certificate of occupancy during calendar year 2020. 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
Village of Mercy	BLD2017-11978	1738 Mercy Drive	166 du
Parramore Oaks Phase 1	BLD2017-12585	750 S. Parramore Ave.	104 du
Pendana Senior Housing	BLD2018-15154	750 S. Texas Avenue	120 du
The Yard at Ivanhoe	BLD2016-06009	1450 Alden Road	591 du 9,294 sq. ft. retail
	BLD2016-07931		
	BLD2016-06000		
Julian at Creative Village	BLD2018-21221	462 N. Terry Avenue	409 du 5,899 sq. ft. retail
Lake Nona Town Center Office Building "C"	BLD2018-18222	13525 Humboldt Dr.	124,517 sq. ft. office
Wyndam Gardens Hotel	BLD2017-04279	5855 American Way	139 hotel rooms 4,643 sq. ft. retail
Loew's Universal Endless Summer Dockside Inn Suites	BLD2018-13396	7027 Universal Blvd	1,011 hotel rooms
Townplace Suites Hotel	BLD2018-15709	51 Columbia Street	110 hotel rooms
Universal's Endless Summer Resort – South Tower	BLD2018-14510	5939 Precision Drive	1,039 hotel rooms
Extra Space Storage	BLD2018-20083	6174 S. Goldenrod Rd	87,843 sq. ft. industrial
Beltway Commerce Center Warehouse	BLD2019-10433	5855 Vista East Pkwy	105,000 sq. ft. industrial
Amazon	BLD2019-11685	1224 S. Orange Blossom Trail	115,280 sq. ft. industrial
Magnolia Self-Storage	BLD2018-19803	100 E. Colonial Drive	99,381 sq. ft. industrial 12,813 sq. ft. retail 1,519 sq. ft. office
Air Commerce Park	BLD2017-10538	9775 Air Commerce Pkwy	561,750 sq. ft. industrial

Commerce Warehouse	BLD2019-10539	4306 Shader Road	107,868 sq. ft. industrial
Corporate Warehouse	BLD2017-00585	6470 Narcoossee Rd	70,000 sq. ft. industrial
Extra Space Storage	BLD2018-18076	408 N. Primrose Drive	94,631 sq. ft. industrial 1,896 sq. ft. retail
Center of Commerce Warehouse	BLD2019-10535	4200 Shader Road	112,882 sq. ft. industrial
Conroy Storage	BLD2018-21897	4752 Conroy Storage Lane	91,350 sq. ft. industrial
BCC Warehouse	BLD2019-18560	5710 Young Pine Road	108,200 sq. ft. industrial
UCF Lake Nona Hospital	BLD2018-20597	6700 Lake Nona Blvd	188,604 sq. ft. hospital

#### 4. PROJECTS APPROVED

The following large scale projects received approval by the Municipal Planning Board, the Southeast Town Design Review Committee, or the Creative Village Development Review Committee during calendar year 2020. 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
Novel Nona	ZON2019-10034	11815 Narcoossee Road	280 du 25,000 sq. ft. retail
Maifly Narcoossee Apartments	MPL2020-10008	6440 Narcoossee Road	240 du
Poitras East-West PD	ZON2019-10035	W of Narcoossee Rd., N & E of Boggy Creek Rd., & S of Lake Nona	4,192 du 2.4 million sq. ft. non-residential
Magic Training Facility	MPL2020-10009	522 W. Central Blvd.	135,000 sq. ft. training facility
Bainbridge Apts.	MPL2020-10018	7575 Universal Blvd.	315 du
Conway-Hoffner Logistics Center	MPL2020-10020	4840 Hoffner Avenue	105,000 sq. ft. industrial
Division Ave. Personal Storage	CUP2020-10003	2300 S. Division Avenue	97,355 sq. ft. personal storage
Stonegate at Lake Nona Assisted Living Facility	MPL2020-10030	10298 Savannah Park Dr.	76,330 sq. ft. assisted living facility
Grand National Apartments	MPL2020-10033	631 Adriana Avenue	349 du
Hudson Apartments	MPL2020-10029	496 S. Kirkman Road	320 du
Mariposa Grove	ZON2020-10009	411 E. Jackson Street	138 du 18,500 sq. ft. retail
Crescent Park	MPL2019-10076	7022 Conway Road	254 du

West Sand Lake Flexspace Warehouses	MPL2020-10052	NW Corner of W. Sand Lake Rd., & Kingspointe Pkwy	112,653 sq. ft. warehouse
389 North	MPL2020-10034	367 N. Orange Avenue	300 du 88,000 sq. ft.
Bainbridge Universal Major Apartments	MPL2020-10045	5767 Major Blvd.	397 du
Orlando Officenter	MPL2020-10048	6249 S. Goldenrod Road	159,000 sq. ft. office/warehouse
Torrey Preserve	MPL2020-10032	8553 Narcoossee Road	280 du
Monarch Orlando	MPL2020-10049	322 E. Jackson Street	400 du 160 hotel rooms
Lake Ave. & E. Pine St. Mixed Use Tower	MPL2020-10058	108 Lake Avenue	129 du 228 hotel rooms
Trio at Jubilee	MPL2020-10060	6708 Hazeltine National Dr.	292 du
Vista Park	MPL2020-10061	S of Passaic Pkwy., S of LeeVista Blvd., S of Econ Trail, W of SR 417 & N of SR 528	4,300 du 20,000 sq. ft. office 80,000 sq. ft. retail
	MPL2020-10062		565 du
North Nona	ZON2020-10019	11751 Narcoossee Road	100 du 103 hotel rooms 28,150 sq. ft. retail
Beth Road	ZON2020-10020	6301 Beth Road	472 du 78,700 sq. ft. non-residential
Alexan at Mills 50	ZON2020-10018	1601 E. Colonial Drive	246 du
Silverhills Apartments Phase II	MPL2020-10055	5885 Lakehurst Drive	166 du
Pinecrest Collegiate Academy	MPL2020-10070	8553 Narcoossee Road	155,916 sq. ft. school
Encore Narcoossee Apartments	ZON2020-10011	7567 Narcoossee Road	252 du
Rosearts	ZON2020-10017	3901 S. Lake Orlando Pkwy.	6,000 du 350,000 sq. ft. retail
Hourglass	ZON2020-10023	2420 Curry Ford Road	250 du
Lake Copeland Assisted Living Facility	CUP2019-10028	1221 S. Orange Avenue	103 du
Postras East N-5	MPL2019-10082	W of Narcoossee Rd., N of Boggy Creek Rd., & S of Laureate Blvd.	306 du
Postras East N-3	MPL2019-10089	W of Narcoossee Rd., N of Boggy Creek Rd., & S of Laureate Blvd.	228 du
Simcom at Lake Nona	MPL2020-10002	S of SR 417, NW of Lake Nona Blvd., & E of Boggy Creek Rd.	82,103 sq. ft. aviation training

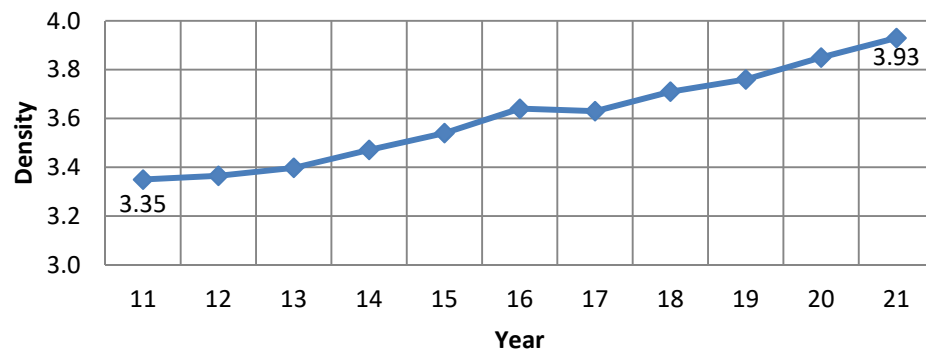
OCPS Elementary School – Site 43	MPL2020-10003	12253 Lake Nona Gateway Road	99,621 sq. ft. school
Postras East N-4	MPL2020-10006	W of Narcoossee Rd., N of Boggy Creek Rd., & S of Laureate Blvd.	124 du
AdventHealth at Lake Nona	MPL2020-10036	NW Corner of Narcoossee Rd. & Lake Nona Blvd.	65,418 sq. ft. medical office
Lake Nona Town Center Phase 1C	MPL2020-10038	N of Lake Nona Blvd., E of Tavistock Lakes Blvd, W of Veterans Way, S of SR 417	69,594 sq. ft. mixed use
Novel Nona	MPL2020-10040	11815 Narcoossee Road	260 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 6,921 persons since last year and 59,643 in the last 10 years. City land area has increased 114 acres since last year and 4,598 acres in the last 10 years.<sup>1</sup>

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

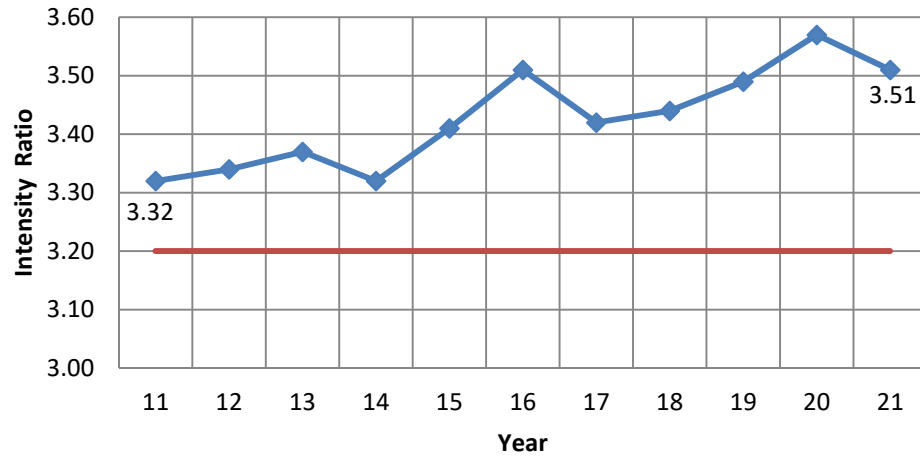
<sup>1</sup> Note: Acres of land in the City on January 1, 2021 was calculated as acres of land in the City on January 1, 2020 (75,906) plus acres of land annexed in 2020 (114). The result (76,020) is higher than the acreage calculated using the City GIS system (75,927), but the result is a more accurate indicator of change since last year. The GIS figure is slightly different because the City boundary layer has become more accurate over the years through continuous mapping and technology improvements.



## 2. EMPLOYMENT DENSITY

### A) JOBS PER ACRE

#### Jobs / Acres of City Land Area



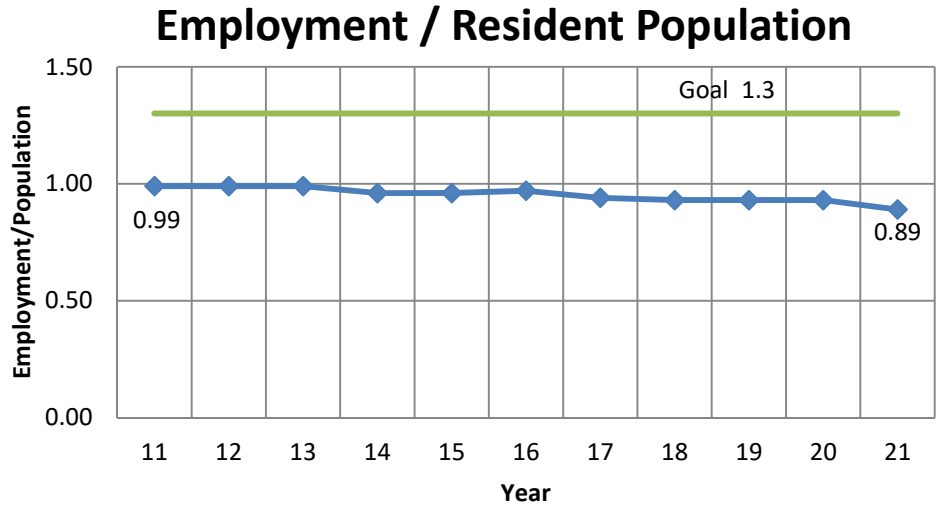
<b>3.2</b>	<b>3.32</b>	<b>3.51</b>	<b>Yes</b>
Goal	2011	2021	Achieved?

Non-Residential Intensity is measured as jobs per acre of City land area. The City lost 3,811 jobs since last year and has gained 29,835 jobs since 2011.<sup>2</sup> The City land area has increased by 114 acres since last year and 4,598 acres in the last 10 years. The current ratio of 3.51 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.

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<sup>2</sup> Note: The employment figure (267,035) is slightly lower than last year's number (270,846). This figure has to do with corrections to the base land use/square footage estimates resulting from the transition from the old database to the new GIS-based City Land Use Database (CLUDB).

**B) JOBS TO HOUSING RATIO**



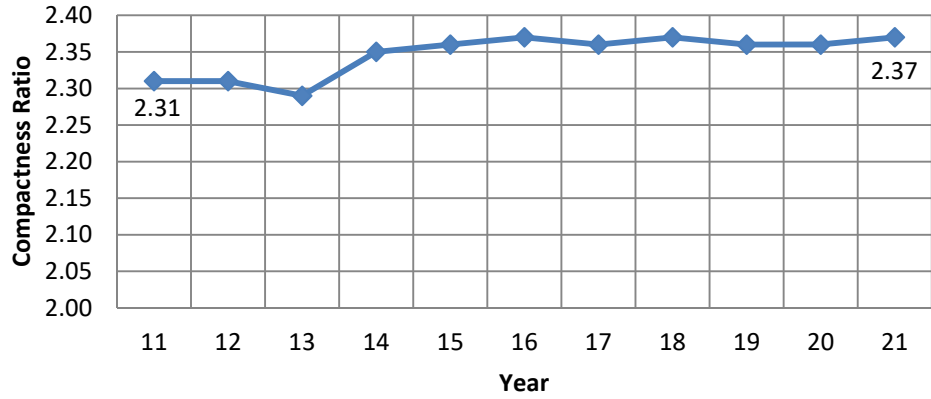
<b>1.02 - 1.3</b>	<b>1.02</b>	<b>0.89</b>	<b>No</b>
Goal	Baseline	2021	Achieved?

Jobs/Housing Balance is measured as a ratio of employment over resident population. With the change in the database with more accurate information, the City jobs dipped last year by 3,811, but has added 29,835 jobs since 2011. The resident population increased by 6,921 persons since last year and 59,643 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 change in the City’s database and the possibility that more people are working from home, 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 0.89 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**



↓	<b>2.31</b>	<b>2.37</b>	<b>No</b>
Goal	2011	2021	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 114 acres during the past year. The City boundary in miles increased by 1.45 since last year. The increase over time is partly due to annexations, and partly due to GIS software that excludes County or State roads that pass between parcels that are inside City limits. The entire outline is included in the miles of City boundary. If the City were to annex roadway areas such as the Greenway (SR 417), the miles of boundary would drop substantially, but from a practical point of view, the City would not change in compactness.

#### 4. MIXED USE DEVELOPMENT

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

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

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

- GMP Future Land Use Element Objective 2.1

<b>Maintain Mix of Land Uses Within Urban and Metropolitan Activity Centers</b>			
<b>Res.</b>	<b>15 - 30%</b>	<b>13%</b>	<b>No</b>
<b>Office</b>	<b>10 - 25%</b>	<b>10%</b>	<b>Yes</b>
<b>Com.</b>	<b>30 - 50%</b>	<b>53%</b>	<b>No</b>
<b>PRI</b>	<b>5 - 20%</b>	<b>10%</b>	<b>Yes</b>
<b>Hosp.</b>	<b>1 - 10%</b>	<b>4%</b>	<b>Yes</b>
<b>Ind.</b>	<b>5 - 10%</b>	<b>10%</b>	<b>Yes</b>
<b>Use</b>	<b>GMP Goal</b>	<b>2020</b>	<b>Achieved?</b>

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

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

- GMP Future Land Use Element Objective 2.2

<b>Maintain Mix of Land Uses Within Mixed Use Corridors</b>			
<b>Use</b>	<b>GMP Goal</b>	<b>2020</b>	<b>Achieved?</b>
<b>Res.</b>	<b>10 - 20%</b>	<b>17%</b>	<b>Yes</b>
<b>Office</b>	<b>10 - 15%</b>	<b>31%</b>	<b>No</b>
<b>Com.</b>	<b>30 - 55%</b>	<b>33%</b>	<b>Yes</b>
<b>PRI</b>	<b>5 - 20%</b>	<b>3%</b>	<b>No</b>
<b>Hosp.</b>	<b>1 - 8%</b>	<b>2%</b>	<b>Yes</b>
<b>Ind.</b>	<b>5 - 15%</b>	<b>14%</b>	<b>Yes</b>

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

In 2020, 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 3% 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 2020, the mix of uses within Mixed Use Corridors fell within the target range for all segments, residential, commercial, hospital and industrial. The percentage of office use was about 16% over the target range. Last year, the Mixed Use Corridor office indicator was 31%, therefore it has remained the same. During the review of the 2016 Evaluation & Appraisal Report, the City's goal for office was reduced from the 2025 goal of 25% to 50% to the 2045 goal of 10% to 15%. This indicator will continued to be monitored to determine if the Mixed Use Corridor office goal will need to be revised.

## 5. TRANSIT ACCESS

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

	Population within ¼ mile of Transit Corridor	Percentage of Total Population	Employment within ¼ mile of Transit Corridor	Percentage of Total Employment
Existing Corridors	144,264	48%	155,054	58%
Future Corridors	17,143	6%	32,497	12%

The total City population is 298,878. Approximately 54% live within ¼ mile of an existing or future transit corridor. The total employment is 267,035. Approximately 70% of employment centers are within ¼ mile of an existing or future transit corridor.

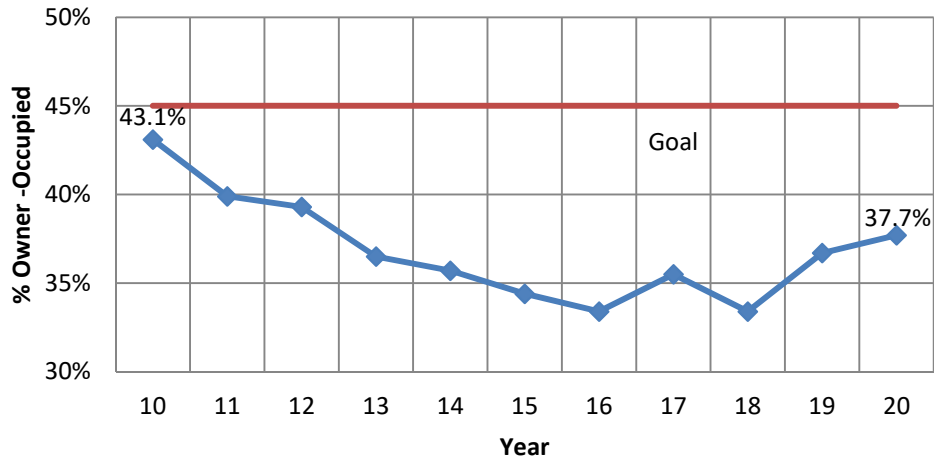
## C. HOUSING INDICATORS

### 1. HOUSING MIX

The Housing Mix is measured by the total number of existing units, both single family and multi-family. The total number of single family units is 43,752 units and the number of multi-family is 94,374 units. The percentage of existing multi-family units is 68%. The annual growth rate of multi-family is -0.6%. This growth can be attributed to the City's growing employment base.

## 2. HOUSING TENURE

### Owner-Occupied Dwelling Units

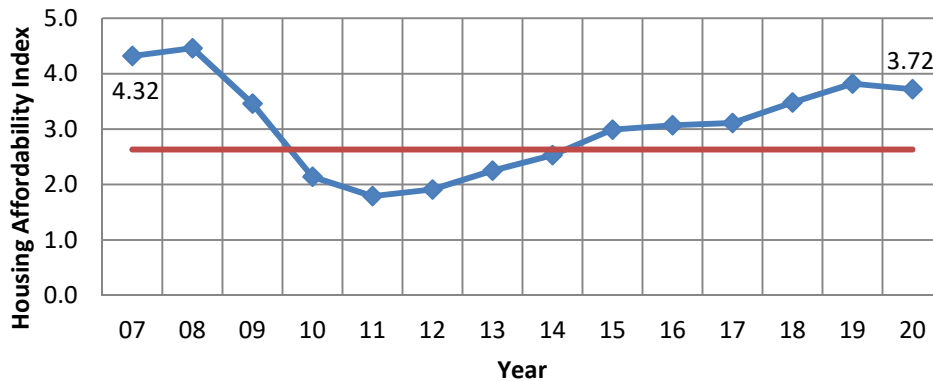


<b>45%</b>	<b>43.1%</b>	<b>37.7%</b>	<b>No</b>
Goal	2010	2020	Achieved?

According to the City Land Use Database there are 138,126 housing units in the City of Orlando at the end of 2020, of which 43,752 are single family units and 97,374 are multifamily units. In an effort to align pertinent housing data with City of Orlando Housing and Community Development household and household cost burden data, additional housing information was drawn from the 2019 ACS (American Community Survey) sources. This data is one year older than City data, therefore results are shown through the beginning of 2020 (reported as 2019 ACS). According to 2019 ACS data for the City of Orlando, there are a reported 138,456 housing units, of which 109,454 (79.1%) are occupied and 29,002 (20.9%) are vacant. Of the occupied units, 41,239 (37.7%) are owner-occupied and 68,215 (62.3%) are renter-occupied. The percentage of owner-occupied units has increased by 1.0% since last year, and is below the 2010 reported rate of 43.1% and the ten year goal of 45%.

### 3. AFFORDABLE HOUSING

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



Median Home Sales Price / Average Household Income for Family of Four			
<b>&lt;2.63</b>	<b>2.86</b>	<b>3.60</b>	<b>No</b>
Goal	Baseline	2021	Achieved?

Information concerning home prices was obtained from the Orlando Regional Realtor Association for the 4-county Orlando Metropolitan Area (Orange, Seminole, Osceola and Lake counties).<sup>3</sup> Information concerning median income was obtained from the U.S. Department of Housing & Urban Development.<sup>4</sup> According to a report from the Orlando Regional Realtor Association, the median sales price for homes in Metropolitan Orlando in 2020 was \$245,000. This figure is \$3,000 more than last year and \$3,000 less than the peak reported in January 2007. The median income for a family of four in Orange County increased from \$65,118 in 2019 to \$68,100 in 2020. This figure has increased by \$2,982 since last year and is a \$10,700 increase since 2007.

The City’s housing affordability goal is a ratio of 2.63. The City’s actual ratio for 2020 was 3.72 and as of January 1, 2021 it is 3.60. This figure is 0.12 less than last year, but is 0.72 below the 2007 baseline of 4.32. Housing prices are increasing, and affordability is a concern now and could be a greater concern in the near future.

<sup>3</sup> Orlando Regional Realtor Association, Metropolitan Orlando Market Overview, 2021 Statistics at a Glance, February 10, 2021, <https://www.orlandorealtors.org/marketreports>

<sup>4</sup> U.S. Department of Housing and Urban Development, FY2020 Median Family Income Documentation System, Orlando-Kissimmee, FL MSA Results. <https://www.huduser.gov/portal/datasets/il/il2020/2020summary.odn>

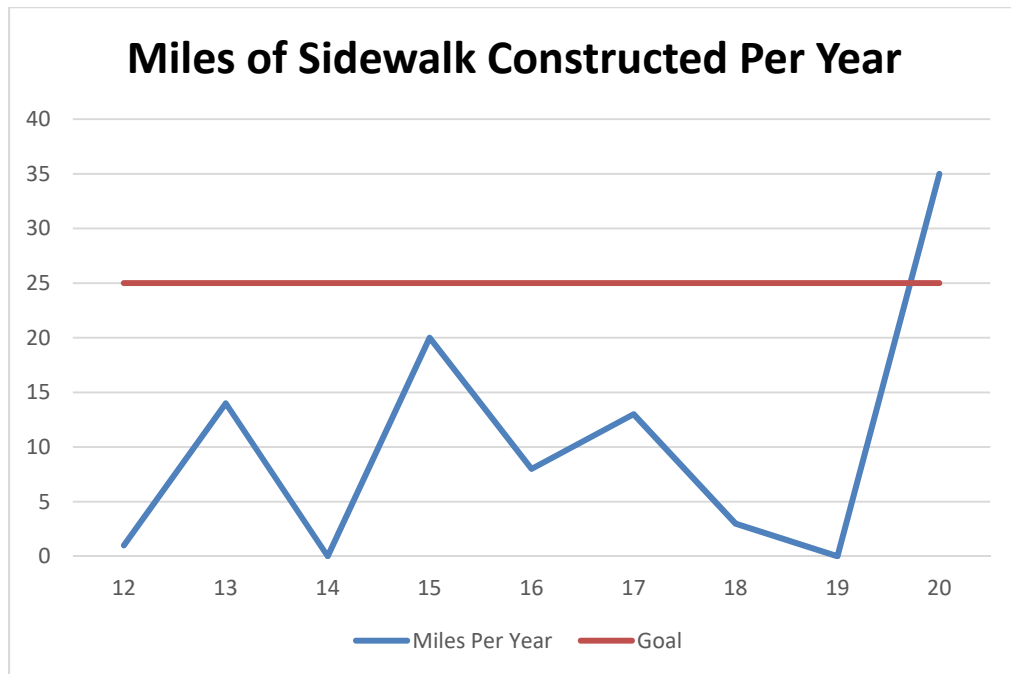


## D. TRANSPORTATION INDICATORS

### 1. MULTI-MODAL INFRASTRUCTURE

#### A) SIDEWALKS

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



<b>+25/yr</b>	<b>35</b>	<b>Yes</b>
Goal	2020	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:

- 947 miles on August 1, 2012
- 961 miles on August 1, 2013
- 961 miles on August 1, 2014
- 981 miles on August 1, 2015
- 989 miles on August 1, 2016
- 1,002 miles on August 1, 2017
- 1,005 miles on August 1, 2018
- 1,005 miles on August 1, 2019
- 1,040 miles on August 1, 2020

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 35 new miles of sidewalks were constructed by Public Works during 2020. 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 4.7 miles since last year, and an increase of 88.8 miles since 2012. In 2020, bikeways include:

Bike Paths:	45.59 miles
Bike Lanes:	269.96 miles
Signed Routes:	53.37 miles
<b>TOTAL:</b>	<b>368.92 miles</b>

**C) TRANSIT CORRIDORS**

LYNX provides bus transit service to the City of Orlando. Also, Sunrail is the region’s commuter rail service. Citywide, there are 156.5 miles of designated Transit Corridors and 110.3 miles or 70% of those corridors currently have LYNX service available for some portion of a typical day.

Sunrail, a commuter train that is a 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) WALKSCORE**

Walk Score is a website that measures the walkability of any address based on the distance to nearby places and pedestrian friendliness. Orlando has a Walk Score of 41 out of 100 which means that people are car-dependent. Most errands require a car. This score has remained the same since last year. There are some individual neighborhoods that have a higher Walk Score. These neighborhoods are South Eola, Central Business District, and 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) BIKESCORE**

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

### **3. VEHICLE MILES TRAVELED**

Vehicle miles traveled is defined as a measurement of miles traveled by vehicles in a specified region for a specified time period. According to the Florida Department of Transportation, as of January 1, 2020, the vehicles miles traveled in Orange County was 43,869,910. This is an increase from last year by 1,342,305 or 3.1%.

### **4. MODE CHOICE**

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

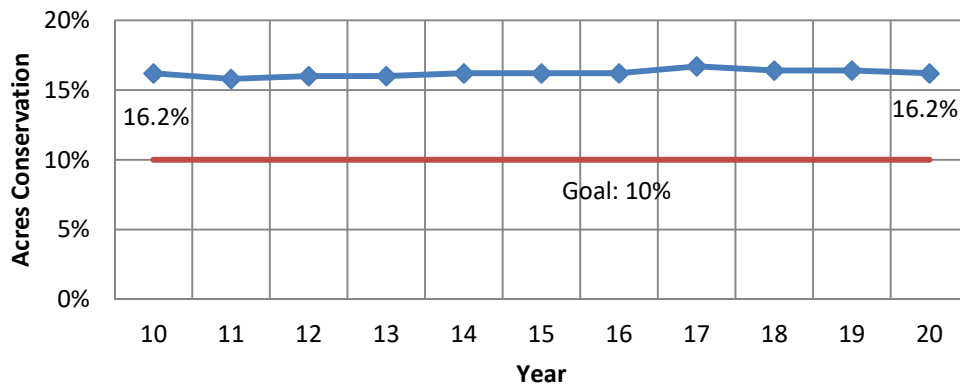
According to 2019 ACS data for the City of Orlando, of the 158,564 workers that travel to work, 76.7% drive a vehicle alone, 10.3% carpool, 1.5% use transit, 1.5% walk to work and 6.8% work from home. Those that chose to use transit decreased by 1.3% from the previous year.

## E. ENVIRONMENTAL INDICATORS

### 1. CONSERVATION ACREAGE

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

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



<b>10%</b>	<b>10.8%</b>	<b>16.2%</b>	<b>Yes</b>
Goal	Baseline	2020	Achieved?

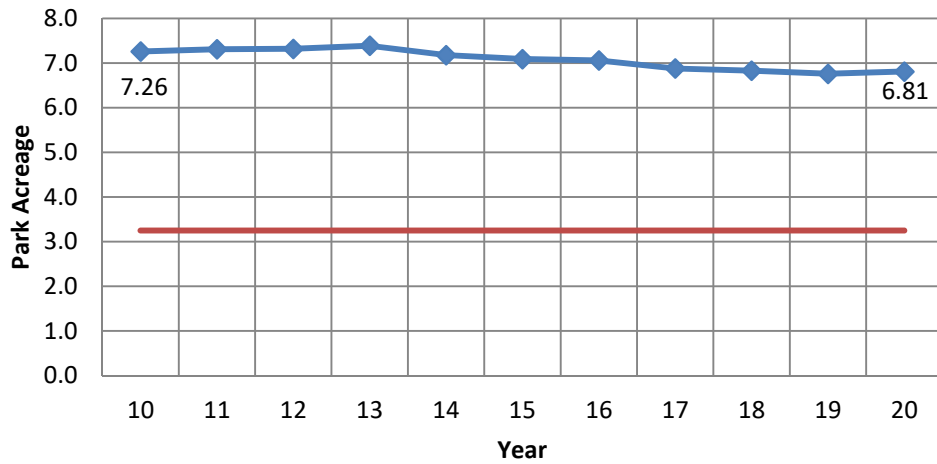
There is currently no accurate way to estimate all open space inside City limits. Open space may occur in any zoning district, may be publicly or privately owned, and may or may not be protected from future development. The next best option is to identify the amount of land that is designated as Conservation 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 114 acres during the past year. Conservation acreage is calculated using future land use designations rather than zoning. The amount of Conservation area in the City has decreased 85 acres since last year. This decrease is due to future land use changes which revised some Conservation areas for Southeast Orlando due to more accurate mapping. Based on these figures, 16.2% 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

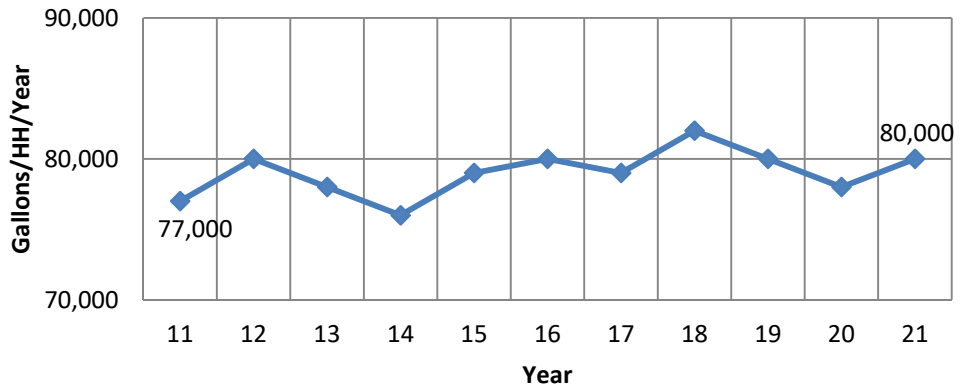


Parks level of service is measured as a ratio of acreage over resident population. The City has 2,034 acres of parks and added 285 acres since 2011. The City's population has increased by 6,921 persons since last year and 59,643 in the last 10 years. Based on these figures, the City's parks ratio is above the required LOS by 3.56 acres per thousand population. There is currently a surplus of 1,078 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

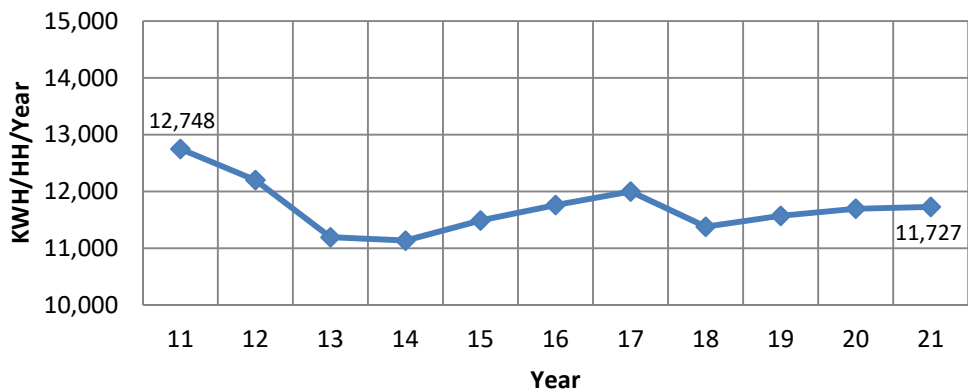
“The City shall reduce total per household potable water demand by an additional 3 percent between 2017 and 2020, and an additional 4 percent by 2040, from a baseline in 2017 of 79,000 gallons per household per year.” - GMP Potable Water Element Objective 1.2.

#### Annual Average Residential Water Consumption



↓	<b>79,000</b>	<b>80,000</b>	<b>No</b>
Goal	2017 Baseline	2021	Achieved?

#### Annual Average Residential Electric Consumption



↓	<b>12,301</b>	<b>11,727</b>	<b>No</b>
Goal	Baseline	2021	Achieved?

Water and electric consumption figures were obtained from Orlando Utilities Commission (OUC). Current data indicates that per household water consumption increased by 2,000 gallons or 2.5% when compared to last year and increased by 3.9% when compared to the 2011 condition. Data also indicates that energy consumption has increased by 0.3% when compared to last year and decreased by 4.7% when compared to the baseline condition. The possible increase for water and electric consumption could be due to more people working from home related to the COVID-19 pandemic.

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

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

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

Major planning accomplishments in 2020 included:

- Downtown FAR Amendments
- Medical Marijuana Dispensary LDC Amendments
- Minor Sign LDC Amendments
- Residential Replat Process Amendments
- Non-conforming Use Regulations Amendments
- Public School Element Amendments

In addition, the following specific activities will be addressed in 2021:

- Livable Orlando – Age Friendly Initiative
- Future - Ready City Implementation
- Transportation Element Amendments
- Water Supply Facilities Work Plan Update

\* \* \*

**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	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	6,921	376,110 projected by 2045	
													40,964 87,564	41,444 90,141	41,977 91,835	42,429 92,241	43,102 94,793	43,752 97,374	650 2,581		
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	(3,811)	Increase	
													95,124 230,733 507	143,170 496,882 1,291	168,675 656,299 423	299,854 428,950 1,217	334,906 596,643 1,775	348,980 125,252 2,299	14,074 (471,391) 524		
													1,461,909 1,641,654 6,289	641,035 -	272,541 19,468	557,834 2,314,369	1,671,200 206,327	80,894 (198,450)			
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	6,921 114 0.08	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	(3,811) 114 (0.06)	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	(3,811) 6,921 (0.55)	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	257.60 111.7 2.29	256.13 114.0 2.35	268.00 114.1 2.36	269.71 114.1 2.37	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	1.45 0.1 0.01	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		2045 Min. 2045 Max.	
		Residential	9%	13%	11%	11%	12%	11%	12%	14%	14%	13%	14%	13%	14%	14%	14%	14%	13%	-1%	15% 30%
		Office	10%	8%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	9%	10%	1%	10% 25%
		Commercial	52%	54%	50%	50%	52%	52%	52%	50%	50%	51%	50%	50%	50%	51%	52%	53%	53%	1%	30% 50%
		Public, Recreational, Institutional	11%	9%	11%	10%	10%	12%	10%	11%	11%	11%	11%	11%	11%	11%	11%	10%	10%	-1%	5% 20%
		Hospital	6%	6%	6%	8%	4%	4%	4%	4%	4%	5%	5%	5%	4%	4%	4%	4%	4%	0%	1% 10%
		Industrial	12%	10%	12%	11%	12%	12%	12%	11%	11%	10%	10%	11%	11%	10%	10%	10%	10%	0%	5% 10%
		TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	5% 10%
	Mixed-use development.	Maintain mix of land uses within Mixed Use Corridor, as provided in GMP Objective 2.2	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020		2045 Min. 2045 Max.	
		Residential												17%	16%	16%	18%	17%	-1%	10% 20%	
		Office												33%	33%	33%	31%	31%	0%	10% 15%	
		Commercial												31%	32%	31%	31%	33%	2%	30% 55%	
		Public, Recreational, Institutional												6%	6%	6%	6%	3%	-3%	5% 20%	
		Hospital												2%	2%	2%	1%	2%	1%	1% 8%	
		Industrial												11%	11%	12%	14%	14%	1%	5% 15%	
		TOTAL												100%	100%	100%	100%	100%	1%	5% 15%	
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	(9,680)	Increase	
																	166,762	155,054	(11,708)		
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%	68.32%	0.25%	Monitor trends	
													1.9%	2.9%	1.9%	-0.2%	0.4%	-0.6%			
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 98,146 43.1%	38,569 96,753 39.9%	38,479 97,918 39.3%	37,425 102,564 36.5%	36,986 103,466 35.7%	37,733 109,685 34.4%	37,094 111,100 33.4%	38,542 108,523 35.5%	35,916 107,590 33.4%	41,860 114,176 36.7%	41,239 109,454 37.7%	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 66.6%	72,316 114,176 63.3%	68,215 109,454 62.3%	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	\$3,000 \$2,982 (0.12)	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	35	Add 4 miles per year.	

Baseline Conditions and Community Development Goals

	Evaluation Criteria	Measure	1/1/2006	1/1/2007	1/1/2008	1/1/2009	1/1/2010	1/1/2011	1/1/2012	1/1/2013	1/1/2014	1/1/2015	1/1/2016	1/1/2017	1/1/2018	1/1/2019	1/1/2020	1/1/2021	Change from Previous Year	Community Development Goal
							Note: Change from previous year reflects 2009 sidewalk inventory.		Note: Change from previous year reflects 2011 sidewalk inventory.											
D1b	Miles of bike infrastructure								280.1	293.2	317.6	317.6	322.4	338.8	361.5	363.5	364.2	368.9	4.7	Build 20 miles between 2010 and 2014.
D1c	Miles of Transit Corridors								155.8	155.8	155.8	155.8	155.8	155.8	156.5	156.5	156.5	156.5	0	Increase
D2a	Walkscore										39	39	41	42	42	41	41	0	Increase	
D2b	Bikescore										52	53	53	53	55	60	60	0	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	Not yet available	3.1%	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	Drive Alone -5.5%, Carpool +1.9%, Transit -1.3%, Walk +0.3%, Other +1.5%, Work Home +3.2%	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%	(85) 114 -0.2%	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%	46 6,921 0.00%	At least 3.25 acres per 1,000 population.
E3b	Per household water consumption	Annual average residential water consumption (per household) in gallons per year.	141,000	140,000	118,000	83,000	79,000	77,000	80,000	78,000	76,000	79,000	80,000	79,000	82,000	80,000	78,000	80,000	2,000	Decrease
		Data is system wide (not City-specific).	as of September 30, 2005*	as of September 30, 2006*	as of September 30, 2007*	as of September 30, 2008*	as of September 30, 2009*	as of September 30, 2010*	as of September 30, 2011*	as of September 30, 2012*	as of September 30, 2013*	as of September 30, 2014*	as of September 30, 2015*	as of September 30, 2016*	as of September 30, 2017*	as of September 30, 2018*	as of September 30, 2019*	as of September 30, 2020*	2.5%	
E3b	Per household energy consumption	Annual average residential electric consumption (per household) in KWH.	13,058	12,908	12,301	12,052	12,143	12,748	12,200	11,192	11,134	11,488	11,760	11,999	11,378	11,570	11,696	11,727	31	Decrease
		Data is system wide (not City-specific).	as of September 30, 2005*	as of September 30, 2006*	as of September 30, 2007*	as of September 30, 2008*	as of September 30, 2009*	as of September 30, 2010*	as of September 30, 2011*	as of September 30, 2012*	as of September 30, 2013*	as of September 30, 2014*	as of September 30, 2015*	as of September 30, 2016*	as of September 30, 2017*	as of September 30, 2018*	as of September 30, 2019*	as of September 30, 2020*	0.3%	

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