

CHAPTER 1

COMMUNITY WIDE ASSESSMENT

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{163.3191(2)(a)}

1.1 INTRODUCTION

The State of Florida's local government comprehensive planning law, Chapter 163, Part 2, Florida Statutes (F.S), requires that all counties and municipalities throughout Florida maintain long-range comprehensive planning programs. The purpose of comprehensive planning is to monitor and evaluate numerous community characteristics relating to development, provisions of services, environmental protection, and other governmental activities. Planning should be a continuous and ongoing process, thus, as a part of this process, local governments are required and periodically prepare Evaluation and Appraisal Reports (EAR) addressing implementation of the comprehensive plan.

The purpose of the EAR is to conduct a summary audit of the comprehensive planning process and evaluate and assess the effectiveness, successes and failures of the County's adopted comprehensive plan toward accomplishing its adopted objectives. This audit affords an opportunity to suggest changes or amendments that are needed to update the comprehensive plan including new or revised objectives, policies, or standards. Moreover, the law provides that the EAR process is the principal process for updating the County's comprehensive plan to respond to changes in state, regional, and local policies on planning and growth management, and changing conditions and trends, to ensure effective intergovernmental coordination, and to identify major issues regarding the community's achievement of its goals.

The proposed EAR reflects Orange County's evaluation of the major issues to be addressed and the requirements of state law. As required by Section 163.3191(2), F.S., the EAR document contains information addressing the following:

- (a) Population growth and changes in land area, including annexation, since the adoption of the original plan or the most recent update amendments.
- (b) The extent of vacant and developable land.
- (c) The financial feasibility of implementing the comprehensive plan and of providing needed infrastructure to achieve and maintain adopted level-of-service standards and sustain concurrency management systems through the capital improvements element, as well as the ability to address infrastructure backlogs and meet the demands of growth on public services and facilities.
- (d) The location of existing development in relation to the location of development as anticipated in the original plan, or in the plan as amended by the most recent evaluation and appraisal report update amendments, such as within areas designated for urban growth.
- (e) An identification of the major issues for the jurisdiction and, where pertinent, the potential social, economic, and environmental impacts.

- (f) Relevant changes to the state comprehensive plan, the requirements of this part, the minimum criteria contained in chapter 9J-5, Florida Administrative Code, and the appropriate strategic regional policy plan since the adoption of the original plan or the most recent evaluation and appraisal report update amendments.
- (g) An assessment of whether the plan objectives within each element, as they relate to major issues, have been achieved. The report shall include, as appropriate, an identification as to whether unforeseen or unanticipated changes in circumstances have resulted in problems or opportunities with respect to major issues identified in each element and the social, economic, and environmental impacts of the issue.
- (h) A brief assessment of successes and shortcomings related to each element of the plan.
- (i) The identification of any actions or corrective measures, including whether plan amendments are anticipated to address the major issues identified and analyzed in the report. Such identification shall include, as appropriate, new population projections, new revised planning timeframes, a revised future conditions map or map series, an updated capital improvements element, and any new and revised goals, objectives, and policies for major issues identified within each element. This paragraph shall not require the submittal of the plan amendments with the evaluation and appraisal report.
- (j) A summary of the public participation program and activities undertaken by the local government in preparing the report.
- (k) The coordination of the comprehensive plan with existing public schools and those identified in the applicable educational facilities plan adopted pursuant to s.1013.35. The assessment shall address, where relevant, the success or failure of the coordination of the future land use map and associated planned residential development with public schools and their capacities, as well as the joint decision making processes engaged in by the local government and the school board in regard to establishing appropriate population projections and the planning and siting of public school facilities.
- (l) The extent to which the local government has been successful in identifying alternative water supply projects and traditional water supply projects, including conservation and reuse, necessary to meet the water needs identified in s. 373.0361(2)(a) within the local government's jurisdiction. The report must evaluate the degree to which the local government has implemented the work plan for building public, private, and regional water supply facilities, including development of alternative water supplies, identified in the element as necessary to serve existing and new development.
- (m) If any of the jurisdiction of the local government is located within the coastal high-hazard area, an evaluation of whether any past reduction in land use density impairs the property rights of current residents when redevelopment occurs, including, but not limited to, redevelopment following a natural disaster.

- (n) An assessment of whether the criteria adopted pursuant to s. 163.3177(6)(a) were successful in achieving compatibility with military installations.
- (o) The extent to which a concurrency exception area designated pursuant to s. 163.3180(5), a concurrency management area designated pursuant to s. 163.3180(7), or a multimodal transportation district designated pursuant to s. 163.3180(15) has achieved the purpose for which it was created and otherwise complies with the provisions of s. 163.3180.
- (p) An assessment of the extent to which changes are needed to develop a common methodology for measuring impacts on transportation facilities for the purpose of implementing its concurrency management system in coordination with the municipalities and counties, as appropriate pursuant to s. 163.3180(10).

Chapter 163.3191, F.S. further specifies the procedures and criteria for the preparation, transmittal, adoption, and sufficiency review of the County's EAR and EAR-based comprehensive plan amendments. Orange County's adopted EAR must be transmitted to the Florida Department of Community Affairs (DCA) for its sufficiency review by July 1, 2006, as required by the DCA schedule.

Organization of the EAR

The proposed Evaluation and Appraisal Report (EAR) addressing the Orange County Comprehensive Plan is organized as follows:

- Chapter 1 – Introduction and Community-wide Assessment
- Chapter 2 – Major Issues
- Chapter 3 – Assessment of Elements
- Chapter 4 – Assessment of Special Topics
- Chapter 5 – Public Participation

Chapter 1 provides the background information summarizing the changes that have occurred in Orange County since the last EAR in 1998. Chapter 2 presents an evaluation of the nine (9) major issues identified by internal and external stakeholders and the public, as agreed upon by Orange County and DCA. An assessment of the County's Comprehensive Plan nineteen (19) Elements is discussed in Chapter 3 – Assessment of Elements. Chapter 3 also provides a summary of conclusions and recommended revisions to the Comprehensive Plan, whether the revision originated from a major issue, an evaluation of the Elements, or an evaluation of an additional requirement. Information to address the additional statutory requirements of Chapter 163.3191, F.S., which are not reflected in the major issues, is contained in Chapter 4 - Special Topics. Chapter 5 outlines the EAR public participation process.

State law provides for the comprehensive plan to be amended consistent with the findings and recommendations contained in the adopted EAR. Chapter 163, Part 2, F.S. requires EAR-based plan amendments to be adopted within eighteen (18) months after the EAR is determined to be sufficient by DCA. An additional six (6) months may be granted, based upon need, by the DCA.

Public Participation

Public participation included informal and formal scoping meetings with participation of numerous internal and external stakeholders; six (6) public workshops with a consultant, a special workshop before the Local Planning Agency (LPA), and the required transmittal and adoption public hearings. A web site for the County's EAR was created early in the process, with links to documents and information as well as to websites such as the DCA EAR web site. Additional in-house meetings were held before the above Public Participation Meetings took place. One was an EAR Kickoff meeting. Several brainstorming meetings were held to define an approach to the EAR and prepare an initial list of EAR issues, background and activities needed to address those issues. Additional brainstorming sessions were conducted to address specific issues. Chapter 5 of this report provides more detailed information on public participation activities.

Identified Major Issues

In 1998, the legislature amended Chapter 163 Florida Statutes to incorporate new criteria for Evaluation and Appraisal Reports (EAR). Section 163.3191(1)(c) was modified to require local governments to identify the major issues and provide an analysis of these issues to further the community's goals. Input from the community, received in public meetings, served as the basis for identifying the major issues to be addressed in the EAR. The State of Florida Department of Community Affairs (DCA) agreed to accept the County's Major Issues through its Letter of Understanding.

- Issue 1: **Economic Development**: There is a need to increase economic diversification and to improve the jobs-housing balance in areas of the County.
- Issue 2: **Environmental Protection**: As the County's development proceeds toward build-out, additional pressures are being placed on natural resources throughout the County, especially within developable areas of the Urban Service Area and on areas adjacent to environmentally sensitive lands and public conservation areas.
- Issue 3: **Parks and Recreation**: The current level of service standards for recreation are 1.5 acres/1,000 population for publicly owned activity-based parks, and 6.0 acres/1,000 population for publicly owned resource-based parks. Although vacant land is available to meet some of these needs, many of the properties are not conveniently located for residents and many of the County's children do not have any neighborhood parks within walking or bicycling distance.
- Issue 4: **Public Safety**: There is a significant public concern about safety at several levels: the neighborhood level, where people live and play; the community level, where they work and socialize, and the regional level of which their community is a part. The primary concerns at the neighborhood level are crime, pedestrian safety, and traffic; at the community level, schools, parks, and traffic; and at the regional level, disaster preparedness, traffic, and public health.

- Issue 5: Regionalism: Regional, formal cooperative efforts are needed to address long-term problems such as water supply, transportation, concurrency, and workforce housing.
- Issue 6: Smart Growth: The County needs to develop additional ways to promote infill development and redevelopment, and ensure that the timing, location, and type of urban expansions support Smart Growth concepts. Such concepts include, but are not limited to, mixed-use, pedestrian oriented development, avoiding sprawl, protecting rural areas, and other associated strategies. The County shall evaluate its existing “Smart Growth” policies and evaluate the need for additional amendments.
- Issue 7: Transportation / Mass Transit / Infrastructure Funding: The County’s transportation system is comprised of various elements, primarily roads to accommodate private motor vehicles. Transit and other multi-modal options are needed to relieve the growth in vehicular traffic and promote infill development. Transit supportive land uses and increased connectivity are required to improve multi-modal opportunities. Additional roadways also are needed to accommodate growth.
- Issue 8: Visioning: Orange County’s CPP would be improved if it were to include a well-articulated, community-based vision to guide planning initiatives through the 21st Century. The Vision Statement(s) adopted into the CPP should describe what we want the County to be like in the future in terms of urban form, physical appearance, and qualities.
- Issue 9: Workforce Housing: Due to high land and housing costs, and low wage jobs, there is a need for more affordable workforce housing within the County.

The EAR is intended to serve as a summary audit of the actions that a local government has undertaken and identify changes that it may need to make. The report is based on Orange County’s analysis of major issues and how they impact attainment of the community’s goals. The EAR evaluates and assesses the effectiveness of the Comprehensive Plan in accomplishing its adopted objectives as they relate to the issues, and will include suggested modifications or amendments that may be needed to update the Plan and its Elements including updated or otherwise revised objectives, policies and standards.

1.2 COMMUNITY PROFILE & GENERAL ECONOMIC CONDITIONS

Overview

Orange County, Florida, the central county of the Orlando Metropolitan Statistical Area (MSA), has several demographic trends that are key to its economy. The County and its residents are confronting many challenges due to the high population growth rate. Residents face a decentralized economy in which driving to work is increasing while bicycling and walking to work is decreasing. The employment base, combined with the relatively high cost for housing and other necessities of life, requires more people in the household to work to maintain a Central Florida lifestyle.

Orange County, Florida in Focus: A Profile from Census 2000 shows that:

Orange County's population grew at a high rate. Population growth in Orange County was 2.5 times the national growth rate. Orange County experienced increases in all age groups compared to the nation, particularly in the youngest (0 to 4 years) and older (65 to 74 years) age groups. Much of Orange County's population growth is due to in-migration. About one in four Orange County residents arrived within the last five years.

Most of the population growth in Orange County is occurring outside the central city. Population growth in unincorporated Orange County grew at three times the growth of the City of Orlando, the County's largest city. The population growth in the Orlando MSA outside of Orange County also grew at about the same rate as unincorporated Orange County. Today, only one in five residents of Orange County lives in the central city.

Orange County's population is growing more diverse. Of the four counties in the Orlando MSA, the population growth in Orange County was the most racially and ethnically diverse. Orange County accounted for a majority of the MSA's non-white population growth and about 65 percent of the MSA's growth in foreign-born population. The Hispanic or Latino ethnic group had the largest increase. The Other Race group, which includes people of two or more races, was the fastest-growing. Caribbean nations contributed the largest share of Orange County's foreign-born population at 33 percent. Language further underscores the growing diversity of Orange County residents: one in four speaks a language other than English at home, with Spanish being the most common.

Orange County residents participate strongly in the labor market. The labor participation rate for the working age population in Orange County was 68.1 percent, compared to the national rate of 63.9 percent. People aged 20 to 44 make up the largest portion of Orange County's population, giving Orange County more workers relative to the non-working population than the national average. Further, the share of Orange County's adults with at least a four-year degree compares favorably with national averages at 26 percent, compared to 24 percent for the nation.

Most working Orange County residents work in Orange County. Six out of seven Orange County working residents are employed within the county. About one-half of commutes in Orange County begin and end outside the central city, and county residents are driving to work in greater numbers. Also, more people are working out of their homes. Yet fewer people are walking and bicycling to work. Additionally, the average commuting time to work increased between 1990 and 2000.

Orange County's moderate-income families face difficulties in paying for housing. While the median household income in Orange County approximates the national figure, more people in the household are working to maintain that income level, as indicated by the county's high labor participation rate. Furthermore, rents in Orange County are relatively high compared to the national average and a number of selected cities. These factors contribute to moderate-income renters facing housing cost burdens: one-half of renters earning \$20,000 to \$35,000 per year pay 30 percent or more of their income on rent. Moderate-income homeowners face similar housing

cost burdens: over one-half of homeowners earning \$20,000 to \$35,000 per year pay 30 percent or more of their income on housing costs. Orange County's employment is heavily concentrated in the hospitality and entertainment industries, which are typically lower-wage jobs.

These findings from Census 2000 highlight both the challenges and opportunities facing Orange County, Florida. The County's high population growth rate will be a challenge as the County tries to effectively accommodate the large number of people living here. With the majority of population growth occurring outside the central city where densities are typically low, Orange County will need to thoughtfully allocate land uses. A low density, spread-out development pattern results in a land consumption rate that is higher than if the development occurred nearer the central city where densities are typically higher. A low-density development pattern also increases the distance between places of work, home, and play, thereby increasing the transportation needs for people wanting to travel between them.

Fortunately, most Orange County residents who are in the labor force work in Orange County. This presents an opportunity to connect many residents' places of work and home. Increasing commute times coupled with an increase in single occupant vehicles, however, indicates either a greater separation of work and home, or increasing traffic congestion that slows the commute time, or both. In any case, Orange County could support policies to reverse this trend. A greater integration of different land uses coupled with alternatives to a single person driving to work in a vehicle (carpool, transit, walk, bike, work at home) are land use and transportation issues the County can address.

Orange County residents' strong participation in the labor market, combined with the large number of working aged population and the diversity of that population presents economic development opportunities. Orange County is attracting people with a range of skills, talents, and backgrounds.

The Economy

Orange County can truly be called the economic heart of Central Florida, with an estimated 989,926 citizens finding employment and earning over 25 billion dollars in personal income annually within the County's 1,000 square mile area. Orange County is known internationally as the home of Walt Disney and the tourism capital of the world, as well as a growth center for various high technology industries. Orange County and the Central Florida area continue to be well positioned economically, with a lower overall unemployment rate and higher job growth than both the state and the nation as a whole. The County has not been immune, however, to unanticipated downturns that require proactive planning and innovative economic development techniques, such as Orange County's recent Economic Stimulus Packages. Orange County has endured the dynamic changes that have emerged over the previous years, such as the events of September 11, 2001, and has recovered to its prior levels of tourism and convention visitors more rapidly than expected.

Economic circumstances dictate the rate and quality of growth in a County or geographic area. Orange County has ranked consistently as one of Florida's top counties in terms of economic prosperity. A number of new potential job generators are proposed for the County, including a

planned University of Central Florida medical school and the County's Innovation Way high technology corridor. The County is going to attract, retain, and expand high-value jobs and businesses to enhance the local and regional economy. With over 900 square miles of land area and a projected population of nearly 1.1 million residents by 2007, Orange County is the heart of Central Florida's economy and forecasts indicate continued economic growth for the foreseeable future.

Orange County's dynamic regional growth can be attributed to entrepreneurial activity and the development and creation of high-value jobs. The excellence of the University of Central Florida's programs and research, and the increased income created by economic clusters in simulation and training, optics, and other high technology industries are projected to continue advancing. According to the Milkin Institute Report *Americas Best Performing Cities*, Orlando was ranked third in entrepreneurial activity nationally. Economic policies of the County and its partners have and will continue to encourage new businesses to locate, expand and create jobs, increase wages, and contribute to overall economic prosperity in our community. According to data published by Woods and Poole, the Orlando MSA is forecasted to be the nation's second largest generator of new jobs for the 10 year horizon (2004-2014).

In 1998, the year of the last Evaluation and Appraisal Report, the County had a just value tax base of \$49 billion. In 2004, the base had increased to over \$78.8 billion. Per capita income has increased to \$27,187 in 2004, a 19% increase over the five year period. New job creation has put Orange County among the leading locations nation-wide for absolute numbers of new jobs created, as well as contributing to a lower unemployment rate than both state and national averages.

The total civilian labor force in Orange County for January 2005 was 531,561 of which 509,060 were employed and 22,501 were unemployed. The County's unemployment rate was 4.2%. The average weekly wage for Orange County in 2004 was \$673. This is equivalent to \$16.83 per hour or \$34,996 per year, assuming a 40-hour week worked during the entire year.

According to the Florida Agency for Workforce Innovation, the total employment for all industries in Orange County was 715,464 in 2004. This total is projected to grow by approximately 16% to almost 846,000 by 2012. The table below shows the projected annual change by industry.

Table 1: Orange County Jobs by Industry

	Employment		Annual Change	
	2004	2012	Total	Percent
Professional and Business Services	126,635	162,611	4,497	3.55
Leisure and Hospitality	134,989	153,483	2,312	1.71
Trade, Transportation, and Utilities	115,526	133,014	2,186	1.89
Education and Health Services	62,170	78,739	2,071	3.33
Government	68,249	80,677	1,554	2.28
Construction	31,126	39,446	1,040	3.34
Other Services (Except Government)	35,896	43,801	988	2.75
Financial Activities	40,566	46,700	767	1.89
Information	16,350	19,647	412	2.52
Manufacturing	29,136	29,617	60	0.21
Mining	22	23	1	0.57
Agriculture, Forestry, Fishing and Hunting	4,433	4,206	-28	-0.64

Source: Florida Agency for Workforce Innovation, Labor Market Statistics - March 2005
 Prepared by: Orange County Planning Division, Research Section, 2006.

Projections by the Florida Agency for Workforce Innovation indicate that the Office and Administrative Support Occupations Group accounted for the largest number of employees in 2004 at 137,984. This number is projected to increase to more than 157,000 by 2012. Table 3 illustrates the 2004 and 2012 projected number of employed for the top ten Occupations Groups in Orange County

Table 2: Orange County Jobs by Occupation Group

	2004 Estimated Number of	2012 Projected Number of
	Employed	Employed
<i>Total, All Occupations</i>	715,469	845,833
Office and Administrative Support	137,984	157,912
Sales and Related	87,143	100,465
Food Preparation and Serving Related	64,079	74,952
Transportation and Material Moving	50,208	58,847
Building and Grounds Cleaning & Maintenance	36,879	41,911
Personal Care and Service	34,470	40,270
Construction and Extraction	33,303	42,349
Management	31,081	37,058
Business and Financial Operations	30,674	38,154
Healthcare Practitioners and Technical	28,703	36,266

Source: Florida Agency for Workforce Innovation, Labor Market Statistics, Occupational Employment Projections Unit.
 Prepared by: Orange County Planning Division, Research Section, 2006.

In summary, Orange County has continued to show improvement in recognized growth indicators such as increased tax base, higher per capita income, market expansion, and job creation. Orange County, and the Central Florida economy as a whole, has experienced the type of growth that in many regions would be desirable, even enviable. Rapid workforce growth, high demand for land and labor, low relative costs to both employers and residents, and a lack of state income tax are just a few of the factors attracting economic activity to the area. Orange County's Evaluation and Appraisal Report and subsequent comprehensive plan amendments will ensure that the Orange County Comprehensive Policy Plan provides a solid foundation for the County's future economic prosperity and reflect the commitment of Orange County to connect the quality of life to economic health and sustainability.

Housing

Orange County will benefit from the coming maturation of the generation known as the "Baby Boomers" by continuing to provide the kind of housing market amenities that induce this highly productive demographic sector. The Baby Boom generation makes up more than 50% of civilian employees nationwide and represents a population of over 250,000 residents in Orange County, nearly 30 percent of the 2000 Census population figure. Of the approximately 72 million family households in the United States, 34 million are headed by baby boomers. With annual household spending at over \$45,000, the Boomers are anticipated to seek quality communities and opportunities to mature in place. Assuming the trend of population growth continues and the demand for suitable housing can be supported by the economy, Orange County can expect to see continued residential building permit requests of over 10,000 units per year.

According to national data, Baby Boomers are turning 50 in the United States at a rate of one every seven seconds. As the fastest growing segment of the population, demographers and planners around the nation are speculating as to the effects this large group will have on housing demand and provision of services needed to accommodate changing life cycles. However, the same factors that have attracted hundreds of thousands of new residents to the Central Florida area should continue to entice Baby Boomers to the area.

Housing market activity is strongly influenced by demographic and socio-economic trends. Social scientists almost unanimously agree demand for new development is changing. Rapidly growing populations tend to generate more housing demand than slow-growing populations but, housing needs and preferences are also shaped by the population's age, family status, and other characteristics.

The desires and needs of baby boomer workers who enter retirement may not be those of past generation, due to new social and economic realities. Studies suggest boomers have higher expectations than their parents for aging and also expect to work well past the age at which past generations retired. In addition to later retirement plans, studies indicate a large percentage of boomers will pursue new careers as well. Policy makers will need tools to interpret these trends in order to provide for dignified living and work environment while understanding the costs of services needed cater to shifting demographics. Although retirement may be a distant reality for those who are turning fifty years old, the desire to find suitable housing for their next phase in life is nearly universal.

In the local context, Orange County has over the past decades chosen a path of planned growth and provision adequate public facilities for new development. examples of smart growth concepts are demonstrated in the Horizon West area, Avalon Park, and numerous other developments and communities.

The Horizon West Plan envisages the orderly transition from rural land uses in formally agricultural areas to urban villages that will provide housing opportunities for new residents in developments of compact, integrated master-planned villages. Through a specific planning process that addresses regional environmental, transportation, employment, and housing issues the County ensures the provision "adequate public facilities" to support the proposed developments.

In other areas of the County such as Avalon Park, Hunters Creek and the Four Corners area planners and developers have worked in collaboration to create mixed use sustainable developments to discourage urban sprawl and prevent miss-allocation of public services resources created by the random location of developments.

Healthy developments cannot be sustained on residential units alone and the critical components of economic and workforce development as well transportation services are an integral part of the healthy real-estate market. Orange County has initiated studies to determine inventories of specific land use categories to insure that there will be sufficient residential, commercial and industrial lands for expansion while also providing for the preservation of agricultural, conservation, and recreational lands to serve the growing population.

The following table shows the total number of housing units for the entire County from the 2000 Census and units subsequently permitted for construction for fiscal years 2000 through 2004.

Table 3: Housing Units and Residential Permits

	2000 Census	2000 Building Permits	2001 Building Permits	2002 Building Permits	2003 Building Permits*	2004 Building permits
1 unit	227,164	6,174	7,393	8,091	8,366	6,459
2 units	8,181	7 (14)	13 (26)	40 (80)	30 (60)	12 (24)
3 or 4 units	19,698	8 (31)	17 (67)	13 (48)	4 (16)	21 (82)
5+ units	85,881	285 (4,020)	162 (3,252)	298 (5,448)	149 (2,883)	150 (2,449)

Total number of dwelling units permitted given in parentheses.

Prepared by: Orange County Planning Division, Research Section, 2006.

The following table shows residential building permit activity for Orange County and neighboring jurisdictions for the years 2000 through May 2005.

Table 4: Total New Residential Building Permits 2000 – 2005 By Jurisdiction

	2000	2001	2002	2003	2004	2005*
Orange County	10,239	10,738	13,667	13,950	14,628	7,389
Lake County	5,231	3,719	4,413	5,163	6,213	2,482
Osceola County	5,035	4,767	5,313	5,515	9,070	3,152
Seminole County	4,419	4,095	2,815	3,605	4,081	1,673
	2000	2001	2002	2003	2004	2005*
Orange County	7,153	7,952	8,373	8,446	7,950	3,671
Municipalities	3,080	3,146	5,289	5,504	6,678	3,718
Apopka	582	528	502	598	923	238
Bay Lake	0	0	0	0	0	0
Edgewood	6	10	73	31	2	0
Lake Buena Vista	0	0	0	0	0	0
Maitland	16	14	14	8	14	46
Ocoee	488	277	305	479	585	196
Orlando	1,052	1,506	3,532	3,449	3,498	2,789
Winter Garden	803	655	772	834	1,501	390
Winter Park	133	156	91	105	155	59

* Census estimates with imputation data through May 2005

Notes: Residential building permit data not available for Belle Isle, Eatonville, Oakland and Windermere.

Permit data is aggregated to include single-family, multi-family and mobile homes by total number of units.

Source: U.S. Bureau of the Census

In conclusion, it is evident that in order to continue to appeal to and retain this productive segment of the population, Orange County must persist in the use of growth management techniques designed to promote communities that offer the services and amenities demanded by boomers. County-wide use of Comprehensive Plan Policies, concurrency regulations, and cutting edge planning techniques will continue to be employed to provide an environment that attracts a quality housing inventory for the future and thus insuring the lifestyle demands are met for the coming wave of new age demographics know as the baby boom.

Infrastructure Development

An efficient transportation system is critical in order to maintain a stable and diversified economy. By assuming a leadership role in the planning and construction of traffic facilities that promote infill development and reduce dependency on long commutes, Orange County can enhance the overall opportunities for its citizens and visitors. Working closely with all levels of jurisdiction, and agencies, both public and private, provides policy makers with the most up-to-date and innovative tools to continue to make strides towards a regional transportation system that enhances a viable and sustainable economy and encourages compact communities, the provision of adequate housing and employment opportunities, as well as needed services and amenities.

Major improvements have already been made ranging from local roadway improvements to new toll roads and major new road projects that serve existing development and new growth. Orange

County and its partners, however, must continue to explore cost-effective ways to increase the capacity, conductivity, and integrity of its transportation system. According to the U. S. Census Bureau 2003 American Community Survey, workers 16 years and over in Orange County who did not work at home had an average travel time of 25.3 minutes.

Technology has also changed how non-residential space in Orange County is being developed, with industrial users congregating toward the best transportation corridors in greater numbers. Our industrial firms have trended toward a reduction in static storage, moving product more quickly from the point of origin to its final destination. This supply-side compression has prompted companies to move to the South Orlando submarket, which has immediate access to our area's major transportation corridors, such as Interstate 4, the Florida Turnpike, U.S. Highway 441 and State Road 528, a toll road that provides direct access from Orlando east to Interstate 95.

A recent study conducted by the Center for Urban Transportation Research found that the Orlando Orange County Expressway Authority provides a valuable asset to Central Florida, providing for annual cost benefits estimated to be near 300 million dollars. According to the study, 70 percent of all jobs in Orange County were located within one mile of the expressway system as of 1993. This connection between transportation corridors and growth is an integral component of land use and intensity decisions made by the County Commissioners, and includes the high-tech industry clusters, infill development, as well as the physical location and design of the roadway system. Orange County is committed to staying the course and will use all of the resources and services available to continue to provide the best system of mobility for the citizens of Orange County.

1.3 POPULATION ANALYSIS {163.3191(2)(a)}

Orange County's population increased from 114,950 in 1950 to 1,019,276 in 2005. According to the U.S. 2000 Census, the County was ranked 45th in population size and 20th in population gain among all counties nationwide. Between 1990 and 2000, Orange County had a 32.3% growth rate and was ranked the fastest growing county among all counties in Florida with population over 500,000. Within the same period, Orange County's population increased by 218,853 people. About 75% of the increase was in the unincorporated area.

Table 5: Orange County Population Growth

	1990*	2000*	2005**	# Change 1990-2005	% Change 1990-2005
Total	677,491	896,344	1,019,276	341,785	50.4
Unincorporated	432,305	596,164	667,185	234,880	54.3%
Incorporated	245,186	300,180	352,091	106,905	43.6%

*1990 and 2000 Census, U.S. Census Bureau

**Estimate for April 2005, University of Florida, Bureau of Economic and Business Research

- Average Annual Growth for Orange County from 1990 to 2000 was 21,885 persons per year

- Average Annual Growth Rate for Orange County from 1990 to 2000 was 2.84% The rate for the State of Florida was 2.14%.
- The unincorporated Share of Orange County's Population increased from 39.3% in 1950 to 66.5% in 2000

Most population growth from 1990 to 2000 in Unincorporated Orange County occurred primarily in four areas:

- Northeast part of the County, between Winter Park and the University of Central Florida, north of the Bee Line Expressway (SR 528)
- South Central Orange County (i.e., Hunters Creek, Meadow Woods and Falcon Trace)
- Northwest Orange County, beyond Apopka
- Southwest Orange County, between Disney and Lake Apopka (i.e., Horizon West, Areas South of Winter Garden/Ocoee)

In 1991, Orange County adopted a Future Land Use Element that estimated the Countywide population at 693,220 and noted an average 4 percent growth rate during the 1980s. Planners at that time could not have envisioned the national and local economic expansion of the 1990s, including the growth of the University of Central Florida and its associated programs, the expansion of local theme parks and related tourist commercial, and other positive economic and population trends. The economic expansion of the 1990s created with it a demand for housing, establishing such large-scale and innovative projects as Horizon West and Avalon Park. The initiation of Innovation Way in 2005 provides another area to meet future population demands.

These original estimates projected that Orange County's total population would increase to 843,600 by 2000, 919,300 by 2005, and 971,100 by 2010. The unincorporated population was projected at 543,860 in 2000, 588,631 in 2005, and 631,215 in 2010. Census 2000 results placed Orange County's total population in 2000 at 896,344, with the unincorporated population at 596,164. Official 2005 population estimates from the Bureau of Economic and Business Research show Orange County's total population at 1,043,209, with the unincorporated population at 677,185. The population projections in the Future Land Use Element underestimated total growth in Orange County by 6 percent in 2000 and 12 percent in 2005. The unincorporated population was underestimated by 9 percent in 2000 and 13 percent in 2005.

More recently, Orange County Planning staff prepared population projections that forecast a total population of 1,797,582 residents by 2030 and an overall increase of 901,238 persons over the thirty year period. It represents 100.54 percent population growth in the thirty year period from 2000-2030, or an average annual increase of 3.35%. This population increase will bring significantly larger public needs that require more public schools and social services as well as consistent economic growth to maintain the availability of employment.

A comparison of these data sources to the University of Florida's official projections shows a slightly lower growth rate over the thirty year period with an overall increase of 786,598 persons in the thirty years. This growth rate also means an 87.76 percent overall growth and a 3.03 percent annual growth rate.

Table 6: Orange County Population Estimates and Projections

	Orange County 1991 Future Land Use Element		Orange County Population Projections (Moderate Projection)		University of Florida Bureau of Economic and Business Research	
	Total	Percent Change	Total	Percent Change	Total	Percent Change
2000	843,600		896,344		896,344	
2005	919,300	8.97%	1,022,571	14.08%	1,042,035	13.98%
2010	971,100	5.63%	1,139,864	11.47%	1,183,386	13.56%
2015			1,299,015	14.00%	1,312,573	10.92%
2020			1,437,418	10.65%	1,441,778	9.84%
2025			1,636,255	13.83%	1,566,611	8.66%
2030			1,797,582	9.86%	1,682,942	7.43%

Sources: Future Land Use Element, Orange County 2000-2020 Comprehensive Policy Plan.

University of Florida Bureau of Economic and Business Research.

Orange County Population Projections, Planning Division, 2003.

Prepared by: Orange County Planning Division, 2006

Relative to Orange County growth trends, the unincorporated areas in east and southwest Orange County experienced significant growth not originally forecasted in the Comprehensive Policy Plan. Orange County's adopted Horizon West optional sector plan for southwest Orange County and the proposed Innovation Way sector plan for southeast Orange County, under review by the Florida Department of Community Affairs, direct these growth trends to create self-sustaining urban villages that promote good urban form. Orange County's citizens have participated in extensive and continuing public outreach for these projects and support these planning efforts.

Based on population projections prepared by the Orange County Planning Division, the Younger Workforce population age group (Ages 20 to 44) has the largest percentage of projected population in Orange County, with almost 38% by the year 2030. The Younger Workforce and Older Workforce age group (Ages 45 to 64) are the major employee base for Orange County. Their combined population will be almost 60 percent of the total county population by 2030. Even though many baby boomers currently in the workforce will retire within the next ten years, members of Generation X already in the workforce, plus members of Generation Y who are currently students or in the younger ages of the prime-age workforce, are projected to be a large enough group to replace the retiring baby boomers.

Table 7: Orange County Population Growth Projections by Age Group through 2030

Age Group	Population				Percent of County Population			
	2000	2010	2020	2030	2000	2010	2020	2030
Pre-Schoolers (0-4)	61,375	69,303	78,409	91,200	7%	6%	5%	5%
Students (5-19)	192,255	245,464	307,767	392,134	21%	22%	21%	22%
Younger Workforce (20-44)	373,439	433,440	541,492	684,390	42%	38%	38%	38%
Older Workforce (45-64)	179,316	281,376	344,501	380,749	20%	25%	24%	21%
Retirees (65-74)	49,369	60,374	103,816	153,007	6%	5%	7%	9%
Elderly (75+)	40,590	49,907	61,433	96,102	5%	4%	4%	5%
Total (County)	896,344	1,139,864	1,437,418	1,797,582	100%	100%	100%	100%

Prepared by: Orange County Planning Division, Research Section, 2005.

Significant growth in the workforce is expected from net migration, or the difference between people moving into Orange County and people moving out of Orange County. A majority of new Orange County residents through the year 2030 are projected to be in the 15-to-29 age group, thereby continually adding younger workers into the County’s workforce.

As the population grows, it becomes more important to foster a sense of place and community within the County. Orange County should play an active role in encouraging self-sustaining community cores in County neighborhoods by using comprehensive planning and zoning regulations to ensure a balanced mix of public, private, and commercial uses in new development. Achieving this equilibrium will assist in strengthening Orange County’s economy by continuing to develop established Growth Centers and employment hubs in key population areas and by ensuring a positive jobs-housing balance throughout the County. Employment opportunities closer to where people live will also help to reduce strain on the County’s transportation network.

1.4 ANNEXATIONS AND CHANGES IN LAND AREA {163.3191(2)(a)}

Orange County currently contains 642,328.14 acres of land and is bounded by Seminole County to the north, Osceola County to the south, Lake County to the West, and Brevard County to the east.

Approximately 20,442.1 acres were annexed from 1998 through 2005, consisting of 32 square miles (Map 1). Most annexation activity in Orange County is voluntary (initiated by the property owner). Orlando has annexed 8,487.38 acres, representing over 41% of all annexations during this time horizon. The second leading municipality for annexations, Apopka, annexed 5,517.39 acres during the same time frame.

Annexation is a process by which the boundaries are extended to incorporate additional lands into a municipality. The residents of an annexed area become residents of the municipality. The

County staff works to ensure that a smooth transition of services is provided to the residents when annexation occurs. In some cases, joint planning area agreements (JPA) and Interlocal agreements assist in ensuring this smooth transition.

Orange County currently has JPAs with Winter Garden, Apopka, Maitland, Oakland, and Ocoee. Since 1998, the JPA with the City of Orlando has expired, the boundaries of the Winter Garden and Ocoee JPAs have expanded, and a new JPA with Apopka has been established. All JPAs with Orange County include stipulations for notification, this includes notification for the adoption of annexation ordinances.

The table below provides additional information regarding annexation activity from 1998 through 2005:

A map showing the areas annexed is included in the Appendix on page 381.

TABLE 8: Annexation Activity in Orange County - 1998 through 2005

	1998 Total Acres	1999 Total Acres	2000 Total Acres	2001 Total Acres	2002 Total Acres	2003 Total Acres	2004 Total Acres	2005 Total Acres	Municipal Totals
Apopka	1,653.0	29.1	219.9	25.1	493.0	1,877.3	874.9	345.1	5,517.4
Bay Lake	0.0	0.0	0.0	0.0	0.0	49.3	0.0	252.7	302.0
Belle Isle	0.0	0.0	167.5	0.0	0.0	0.0	0.0	99.6	267.1
Eatonville	0.0	0.0	0.0	0.4	1.2	0.0	18.7	2.6	22.9
Edgewood	0.0	0.0	0.0	0.0	33.0	0.0	0.0	0.0	33.0
Maitland	2.9	206.4	64.3	0.0	380.3	0.0	44.5	0.0	698.4
Oakland	36.9	216.3	0.0	26.8	0.0	6.5	132.5	22.6	441.6
Ocoee	127.2	3.3	59.2	385.2	20.6	150.8	81.6	6.9	834.8
Orlando	3,440.3	90.2	1,050.7	591.8	1,029.4	409.8	1,764.8	110.4	8,487.4
Windermere	0.0	610.2	0.0	198.0	4.2	2.8	813.7	0.0	1,629.0
Winter Garden	229.0	4.9	29.1	126.6	539.8	54.8		59.1	1,043.3
Winter Park	0.4	138.1	2.6	109.1	458.0	164.4	292.9	0.6	1,166.1
Municipal Contractions	0.0	0.0	-43.8	0.0	0.0	0.0	-12.9	-0.2	-56.8
Total Acreage	5,489.8	1,298.6	1,549.6	1,463.1	2,959.4	2,715.6	4,010.7	899.4	20,386.2
Total number of Annexations	98	57	80	83	134	93	NA	71	

Prepared by: Orange County Planning, Intergovernmental Relations Section, March 2006.

1.5 VACANT AND DEVELOPABLE LAND ANALYSIS {163.3191(2)(b)}

The vacant land analysis was performed by merging the Property Appraiser's parcel database with the Future Land Use Map layer from the County's Geographic Information Systems (GIS) database. More specifically, the parcel data layer was sorted by the Department of Revenue Use Codes (u-codes) which represent the parcel centroids. The Future Land Use layer provides the land type and the Jurisdiction layer was used to determine parcels in unincorporated Orange County. The parcel layer includes the data used for the acreage calculations. It should be pointed out that road rights-of-way, railroad rights-of-way, powerline transmission corridors, and the like are not included in the acreages because they are not coded as parcels and do not have a specific land use assigned. In general, however, such lands would not be classified as vacant and developable. Also, waterbodies are not treated consistently in the County's and Property Appraiser's databases and may or may not be counted with land parcels depending upon their size and whether or not they are wholly contained within a parcel.

The first step in the process was to choose all of the u-codes that were in Unincorporated Orange County based on the jurisdiction layer. These were spatially joined with the Future Land Use layer to create a layer with the attributes from both. This "polygon to point join" was an important design decision because the parcels and land use polygons do not necessarily coincide, which creates erroneous data. In the new layer, a field was added called acreage. This field was populated by performing a table join with the parcel layer and field calculating the acreage into the new field. For the few parcels without the acreage data, the area field was divided by 43,560 to determine the acreage. A second new field called vacant was added to act as a flag for final analysis. Using the DOR u-codes, the records were selected for all vacant and agricultural classifications. A summarizing action was performed on the land use field, including a sum of acreages, to produce the final results.

While the final results are not completely accurate, they provide a fairly good snapshot of the unincorporated County at this time. Some of the inaccuracies derive from data entry errors in the various data sets queried, estimating and rounding errors, and unmapped land use changes. Therefore, the usefulness of this type of vacant land analysis is limited when applied County-wide. Also, such a generalized analysis does not account for density or intensity changes or for redevelopment. The amount of vacant residential land, for example, is not directly correlated to the number of dwelling units that could be built. Therefore, the analysis at the County scale is of little practical use for determining needs. Vacant land analysis is most useful when applied to smaller geographic areas or to communities because then it does allow for proper evaluation and balancing among land uses and can identify surpluses and deficiencies of particular land uses. At a gross scale, it is not possible to identify specific deficiencies or surpluses.

It should be pointed out that agricultural lands have been categorized as vacant and developable. This is due to the historical trend of conversion of agricultural lands to urban uses and the fact that the County does not have any specific agricultural future land use classifications or zoning districts but rather, residential land use categories that allow for agricultural activities. As such, the remaining agricultural land within Orange County is expected to be developed over time. Over the long run, the only agricultural operations expected to remain active in the County are in

the foliage industry and ornamental horticulture as these agricultural activities are essential to the real estate development sector of the regional economy.

TABLE 9: ORANGE COUNTY UNINCORPORATED AREA – DEVELOPED AND UNDEVELOPED AREA BY FUTURE LAND USE CATEGORY

Future Land Use	Density/Intensity	Developed Acreage	Percent Developed	Undeveloped Acreage	Percent Undeveloped
Rural/Agricultural	1 DU/10 AC	42,821.01	11.80%	111,842.99	30.82%
Rural Settlement 1/5*	1 DU/5 AC	2,778.05	0.77%	1,512.13	0.42%
Rural Settlement 1/2*	1 DU/2 AC	1,361.72	0.38%	584.75	0.16%
Rural Settlement 1/1*	1 DU/AC	8,669.99	2.39%	3,923.85	1.08%
Rural Settlement Low Density	2 DU/AC	0	0.00%	0	0.00%
Low Density Residential	4 DU/AC	60,288.05	16.61%	8,034.23	2.21%
Low-Medium Density Res.	10 DU/AC	11,387.24	3.14%	3,966.67	1.09%
Medium Density Residential	20 DU/AC	6,850.17	1.89%	1,855.53	0.51%
High Density Residential	50 DU/AC	294.82	0.08%	189.53	0.05%
Neighborhood Residential	20 DU/AC 0.4 FAR	73.92	0.02%	9.02	0.00%
Neighborhood Activity Corridor	25 DU/AC 1.0 FAR	38.64	0.01%	6.15	0.00%
Neighborhood Center	40 DU/AC 2.0 FAR	34.86	0.01%	5.00	0.00%
Office	3.0	1,143.12	0.31%	516.60	0.14%
Commercial	3.0	7,565.29	2.08%	1,748.31	0.48%
Industrial	0.5	11,061.26	3.05%	1,748.31	0.48%
Institutional	2.0	19,650.01	5.41%	175.14	0.05%
Activity Center Mixed-Use	30 du/ac, Com - .34 FAR, Office - 1.5 FAR, Indus 0.5 FAR, Lodging - 60 rms/ac	3,346.51	0.92%	2,282.07	0.92%
Activity Center Residential	30 du/ac (min 12 du/ac), Non-res = 10,000 sf per 125 units, max 50,000 sf per development.	953.44	0.26%	747.42	0.21%
Village (Horizon West)	Min avg gross 3.4 du/ac, Min avg net 5 du/ac, Neighborhood Center - (2-4 ac max) .40 FAR & 20,000 sf, Village Center - (60 ac max) 0.4 FAR	9,466.40	2.61%	11,871.24	3.27%
Community Village Center (Four Corners)	10 du/ac, min 1 du/ac, Com - .25 FAR, Off - .25 FAR, Institutional - .50 FAR	145.06	0.04%	88.23	0.02%
Traditional Neighborhood Development (Avalon Park)	30 DU/AC, Off - 1.7 FAR, Com - 1.0 FAR, Ind - 0.5 FAR	853.95	0.24%	749.14	0.21%
PD-x		6,576.07	1.81%	6,254.50	1.72%
TOTAL		195,359.58	53.83%	163,642.75	43.57%

Prepared by: Orange County Growth Management, April, 2006.

Table 8 summarizes the analysis of vacant land described above. Water bodies, parks and open space (PR/OS), and Preservation (Pres) are not included in the table. Acreage totals are for developed and undeveloped areas in the unincorporated part of the County only. Some areas will contain wetlands which will reduce the actual developable areas of the vacant lands shown in the table, but for the purposes of this generalized analysis, the totals are sufficiently accurate.

The inclusion of agricultural land in the vacant and developable category does not mean that the County expects all such lands to be developed for urban uses. Many of these areas contain environmentally sensitive habitats such as wetlands, scrub, and sinkholes. Additionally, the County and other agencies likely will acquire additional public lands over time to accommodate the needs for environmental protection, flood protection, potable water supplies, and recreation.

1.6 LOCATION OF DEVELOPMENT {163.3191(2)(d)}

The County evaluated the location of existing development in relation to the location of development as projected in the original plan to look at whether areas designated for urban growth saw more or less growth than anticipated. Most of the population growth from 1990 to 2000 in Unincorporated Orange County occurred primarily in four areas:

- Northeast part of the County, between Winter Park and the University of Central Florida, north of the Bee Line Expressway (SR 528)
- South Central Orange County (i.e., Hunters Creek, Meadow Woods and Falcon Trace)
- Northwest Orange County, beyond Apopka
- Southwest Orange County, between Disney and Lake Apopka (i.e., Horizon West, Areas South of Winter Garden/Ocoee)

A comparative analysis of Census 2000 and historical data reveal that a smaller percentage of the region's citizens are living in central city areas than in previous times. Growth, overall, was greater than originally anticipated in the plan; however, the County's adherence to its Urban Service Area boundary has ensured that almost all of the recent growth has occurred where central water and sewer services are or will be available.

Population growth in unincorporated Orange County grew at three times the growth of the City of Orlando, the County's largest city. The population growth in the Orlando MSA outside of Orange County also grew at about the same rate as unincorporated Orange County. Today, only one in five residents of Orange County lives in the central city.

Six out of seven Orange County working residents are employed within the county. About one-half of commutes in Orange County begin and end outside the central city, and county residents are driving to work in greater numbers. Also, more people are working out of their homes. Yet fewer people are walking and bicycling to work. Additionally, the average commuting time to work increased between 1990 and 2000.

Most of the population growth in Orange County is occurring outside the municipalities because that is where most of the vacant land exists. Additionally, most of the recently existing vacant residential lots in urban core and suburban areas now have been built upon, taking advantage of existing services and facilities. Another recent trend that has been increasing steadily is the splitting of existing larger lots into smaller parcels. The hot real estate market in Central Florida is driving these last two trends, especially lot splits, as homeowners and investors seek to cash in on the recent profit taking.

Pressure has been exerted to increase allowed densities in rural areas, especially in the eastern part of the County. The County's adherence to its Rural Settlement policies and Urban Service Area has minimized urban development in rural areas. Within Rural Settlements, growth has occurred, mainly as new homes have been built upon existing lots, but also due to increases in density, mainly to acre lots. A few Planned Developments have been approved in rural areas, but these have been limited and are generally large-lot developments. Despite the pressures, no significant development has occurred within the Rural Service Area since 1998 except for two areas: the extreme northwest, near the Lake County Line, and the southwest, the area known as Horizon West.

One rural area of the County that is expected to see increasing development is the large area known as Horizon West. This part of the County lies outside of the Urban Service Area and was once characterized by large tracts planted in citrus. After the devastating freezes in the 1980's, the local citrus industry never recovered. The Horizon West Master Plan is an attempt to be innovative and proactive, planning for balanced, mixed-use communities, each with its own Small Area Plan. Over time, the Urban Service Boundary will be extended to include Horizon West. Master planning for future water and sewer services is already under way. Over time, the County will be able to monitor and evaluate the success or problems with this approach to planning for future growth.