GROWTH MANAGEMENT PLAN

2022 – 2050
GROWTH PROJECTIONS REPORT
WITH ESTIMATES FOR JANUARY 1, 2022

OCTOBER 2022

CITY OF ORLANDO

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Introduction

This 2022-2050 Growth Projections Report provides land use, population, and employment data for the City of Orlando, including past trends, current estimates, and projections for the future to the year 2050. These projections form the basis for the City of Orlando's Growth Management Plan (GMP) which incorporates a future land use and transportation planning philosophy that promotes a compact, interconnected, mixed use environment, thereby creating opportunities for responsible growth and ensuring a high quality of life. Orlando's future land use concept seeks to create compact activity centers with meaningful transportation alternatives, while preserving existing neighborhoods and creating sustainable new neighborhoods.

The projections are used primarily for transportation modeling, particularly in support of regional transportation planning efforts. The projections are also used in level of service (capacity) analyses for transportation, parks, stormwater, solid waste, potable water, wastewater, fire and police, and schools. Related to these services, the projections are used in the City's Concurrency Management System, and in budgeting and capital improvement programming. And finally, the City publishes these growth projections and other demographic information for use by individual citizens, citizen groups, consultants, and businesses.

By forecasting a specific quantity of new development and redevelopment in the future, the City can ensure that adequate public facilities will be in place when that development is built. Growth projections are important to ensure that the GMP continues to reflect current development trends and economic conditions.

Past Trends – Population & Land Area

Since its incorporation in 1875, Orlando has grown significantly in terms of land area, population, employment, and influence in the Central Florida region. In 1875, Orlando comprised a 1 square mile area with a population of only a hundred or so. Orlando made its first official demographics appearance in the United States Census of 1890. At that time, Orlando had a population of 2,856 persons. For comparison, Jacksonville was the largest city in the state of Florida with a total population of 17,201, Tampa had 5,532 persons, and the City of Miami did not yet exist. Orlando experienced a population loss in 1900 due to the great freeze of 1895, lowering the population to 2,481. However, from 1910 through 2020, the City of Orlando grew steadily from a small town to a large city (see Figure 1).

Figure 1—Orlando and Orange County Historical Population

Year	City of Orlando	% Growth	Orange County	% Growth	% of Orange County Population
1890	2,856	N/A	12,584	N/A	22.7%
1900	2,481	-13.13%	11,374	-9.62%	21.8%
1910	3,894	56.95%	19,107	67.99%	20.4%
1920	9,282	138.37%	19,890	4.10%	46.7%
1930	27,330	194.44%	49,737	150.06%	54.8%
1940	36,736	34.42%	70,074	40.89%	52.4%
1950	52,367	42.55%	114,950	64.04%	45.6%
1960	88,135	68.30%	263,540	129.26%	33.4%
1970	99,006	12.33%	344,311	30.65%	28.7%
1980	128,291	29.58%	470,865	36.76%	27.2%
1990	164,693	28.37%	677,491	43.88%	24.3%
2000	185,951	12.91%	896,344	32.30%	20.7%
2010	238,300	28.15%	1,145,956	27.85%	20.8%
2020	307,573	29.07%	1,429,908	24.78%	21.5%

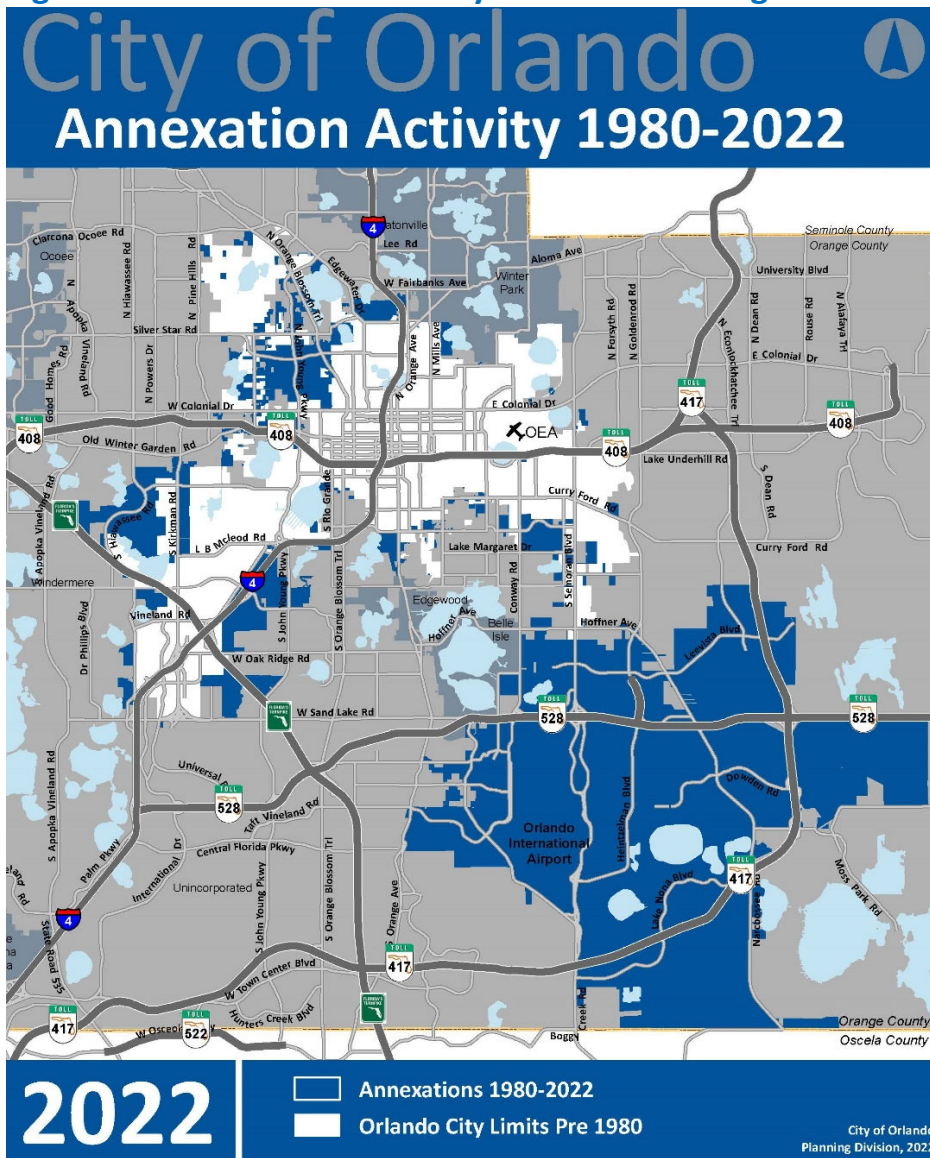*Source: U.S. Census, Various Years*

Since 1980, the City has experienced a great deal of growth in land area as the result of numerous annexations. Figure 2a below shows the City's growth in acres, square miles and resident population per square mile. Figure 2b is a map showing the areas where recent annexation activity has taken place.

According to these figures, Orlando's land area increased by **48,489 acres (75.76 square miles)** between 1980 and 2022. Much of this acreage consists of the Orlando International Airport property, as well as properties within the Southeast Orlando Sector Plan/Lake Nona, Vista East, Storey Park, and Starwood/Meridian Parks areas in southeast Orlando.

Figure 2a—City Dimensions and Population Per Square Mile

Year	Acres	Square Miles	Population	Population Per Square Mile
1980	27,624	43.16	128,291	2,972
1990	46,196	72.18	164,693	2,282
2000	65,888	102.95	185,951	1,806
2010	71,422	111.60	238,300	2,135
2020	75,906	118.60	307,573	2,593
2022	76,113	118.93	319,793	2,689

Figure 2b – Annexation Activity from 1980 through 2022

City of Orlando
Annexation Activity 1980-2022

2022

☐ Annexations 1980-2022
■ Orlando City Limits Pre 1980

City of Orlando
Planning Division, 2022

Residential Land Use and Population Estimates & Projections

The following figures summarize the projected single-family and multifamily dwelling unit growth, and resident population growth, between 2022 and 2050 for each GMP subarea and for the City of Orlando as a whole. Figure 3 below depicts the five GMP subareas referenced in the remainder of this report.

Figure 3 – Growth Management Plan (GMP) Subareas
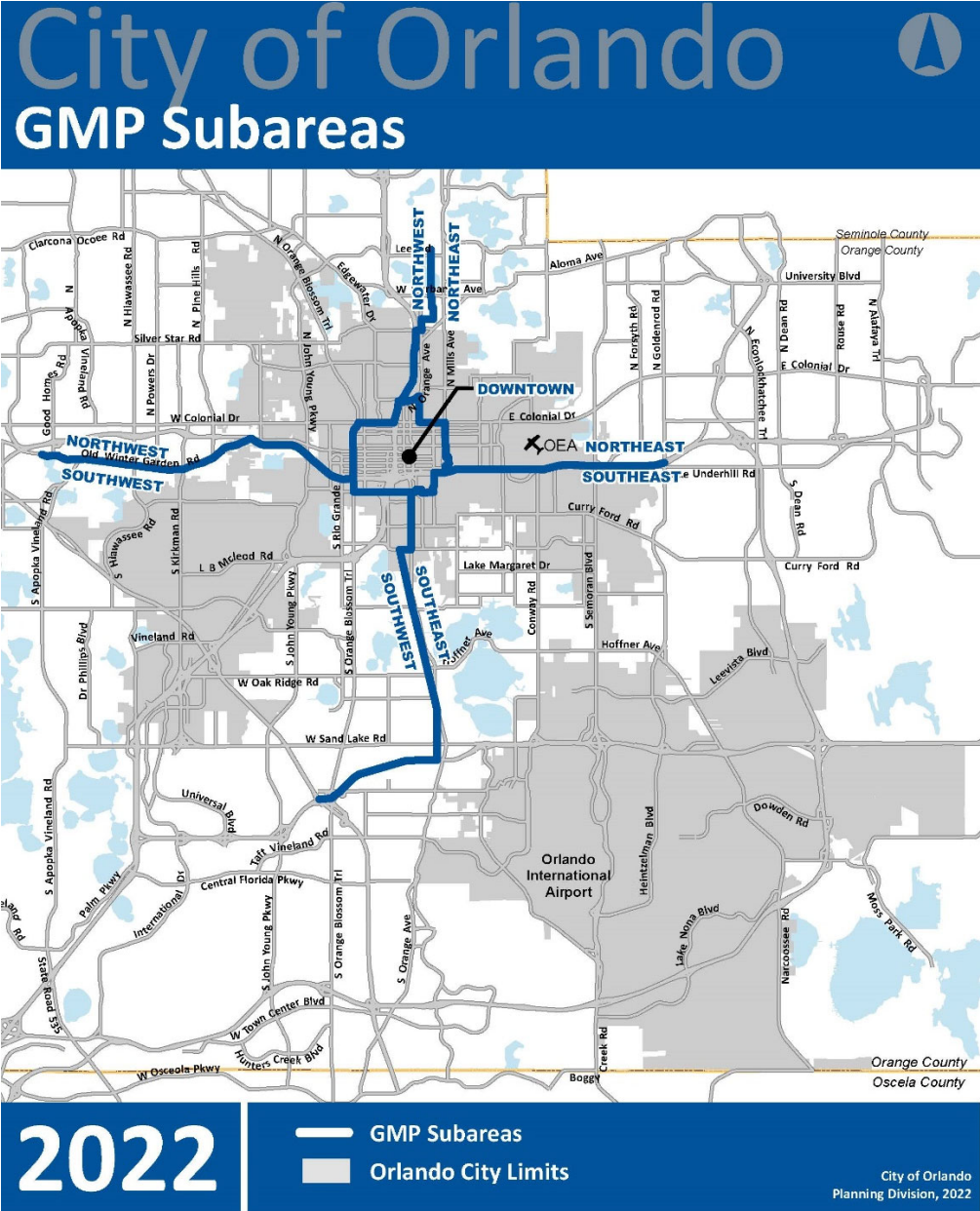
Figure 4 – Summary of Single-Family Residential Dwelling Unit Growth By Subarea from 2022 to 2050

	January 1, 2022	2050	Change/Growth 2022-2050 (Units)	Change/Growth 2022-2050 (%)
Northwest	7,895	7,910	15	0.19%
Northeast	6,262	6,288	26	0.42%
Downtown	998	1,002	4	0.40%
Southwest	8,149	8,149	0	0.00%
Southeast	21,061	33,183	12,122	57.56%
Orlando Total	**44,365**	**56,532**	**12,167**	**27.42%**

Figure 5 – Summary of Multifamily Residential Dwelling Unit Growth By Subarea from 2022 to 2050

	January 1, 2022	2050	Change/Growth 2022-2050 (Units)	Change/Growth 2022-2050 (%)
Northwest	9,055	21,227	12,172	134.42%
Northeast	8,667	14,265	5,598	64.59%
Downtown	14,825	24,037	9,212	62.14%
Southwest	34,034	41,503	7,469	21.95%
Southeast	33,915	56,116	22,201	65.46%
Orlando Total	**100,496**	**157,148**	**56,652**	**56.37%**

Figure 6 – Summary of Resident Population Growth By Subarea from 2022 to 2050 ("Bottom-Up" from Traffic Zones)

	January 1, 2022	2050	Change/Growth 2022-2050 (Units)	Change/Growth 2022-2050 (%)
Northwest	38,851	64,648	25,797	66.40%
Northeast	34,098	46,006	11,908	34.92%
Downtown	24,756	38,657	13,901	56.15%
Southwest	94,825	110,633	15,808	16.67%
Southeast	127,263	208,125	80,862	63.54%
Orlando Total	**319,793**	**468,069**	**148,276**	**46.37%**

Single family units are defined as detached units irrespective of ownership. Multifamily is defined as an attached residential unit and can include both owner-occupied and renter-occupied types (i.e., duplexes, tri-and quadruplex, townhomes, condos, and apartments including accessory dwelling units, or ADUs). Associated maps graphically depict population growth for the same timeframe.

New single-family growth will be occur primarily in the Vista East, Southeast Orlando Sector Plan including Lake Nona, Starwood/Meridian Parks, and Storey Park portions of the southeast subarea with over 12,000 units to be built within the next 28 years. Multifamily dwelling unit growth is anticipated to be spread throughout the City and concentrated in mixed use activity centers and mixed use corridors, with significant growth associated with the RoseArts and Packing District Planned Developments in the northwest, the redevelopment of the Fashion Square Mall site in the northeast, high density projects in the Downtown including Creative Village, new apartment projects near International Drive and the attractions area in the southwest, and in the southeast area which includes the Lake Nona Town Center along with apartment projects along the Narcoossee Road corridor. All in all, it is anticipated that an additional 56,600 multifamily units will be constructed between 2022 and 2050.

Figure 7 below depicts existing resident population distribution as of January 1, 2022, while Figure 8 shows projected cumulative population growth through the year 2050. These figures identify which areas of the City have, or are projected to have, higher concentrations of resident population as compared to other areas of Orlando.

Existing resident population is located throughout the City, with particularly high concentrations in the central Traditional City neighborhoods, inner-ring suburbs, outer suburbs such as MetroWest, Rosemont, and along the Semoran Boulevard and Kirkman Road corridors.

Significant population growth is anticipated within the RoseArts and Packing District Planned Developments in the northwest, Downtown Orlando, and in the attractions area near International Drive. By far, the largest amount of population growth (+80,862 people) will occur in the southeast area which includes the Vista Park, Starwood/Meridian Parks, Storey Park, and Lake Nona Planned Developments. It is anticipated that Orlando's overall population will increase by 148,276 people between 2022 and 2050, a 46.37% increase.

Please see Appendices A and B for traffic analysis zone specific residential dwelling unit and population projections.

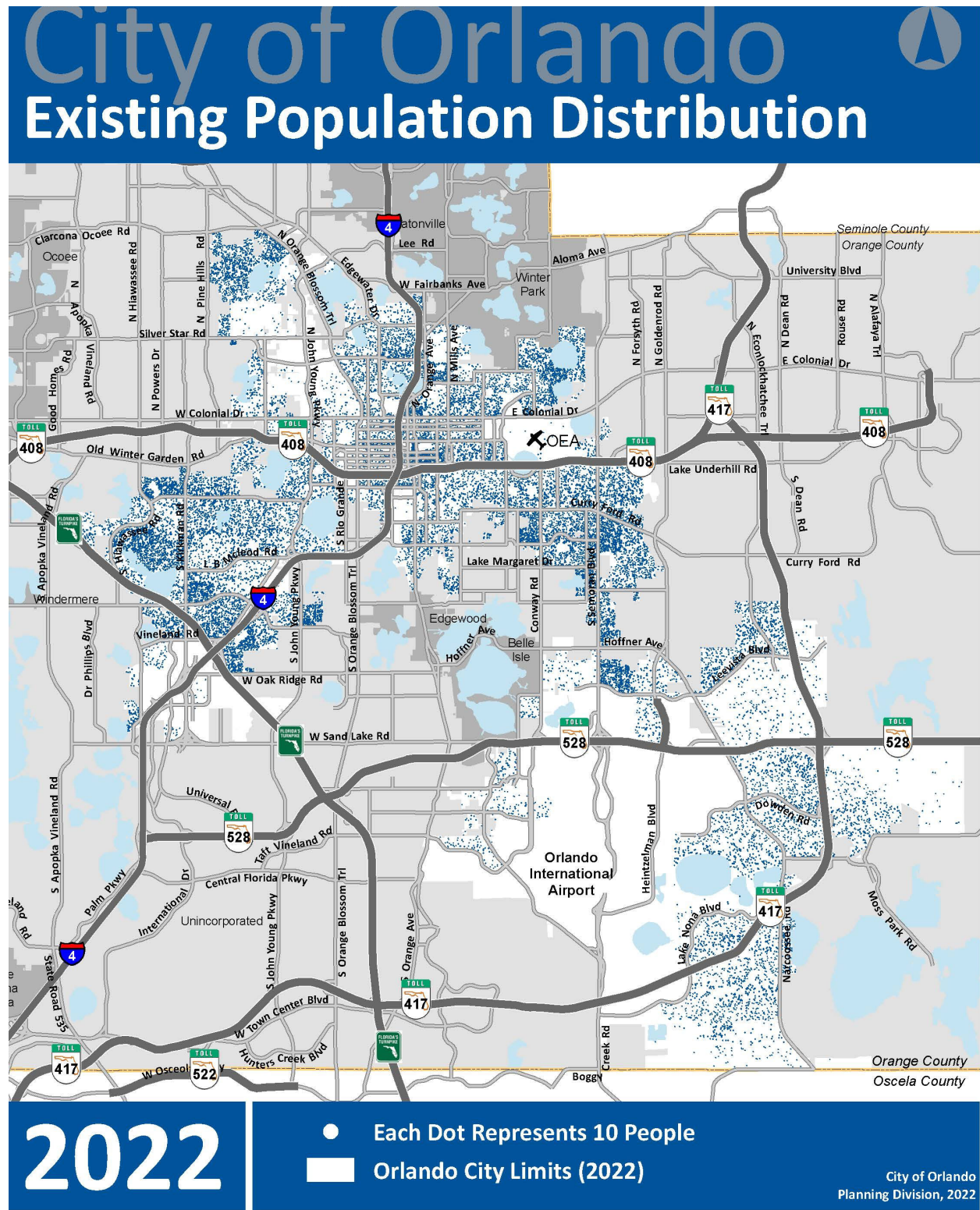**Figure 7 – Existing Resident Population Distribution – January 1, 2022**

City of Orlando
Existing Population Distribution

2022

Each Dot Represents 10 People
Orlando City Limits (2022)

City of Orlando
Planning Division, 2022

Figure 8 – Projected Resident Population Distribution – Year 2050

City of Orlando
Projected Population Distribution

2050

Each Dot Represents 10 People
Orlando City Limits (2022)

City of Orlando
Planning Division, 2022
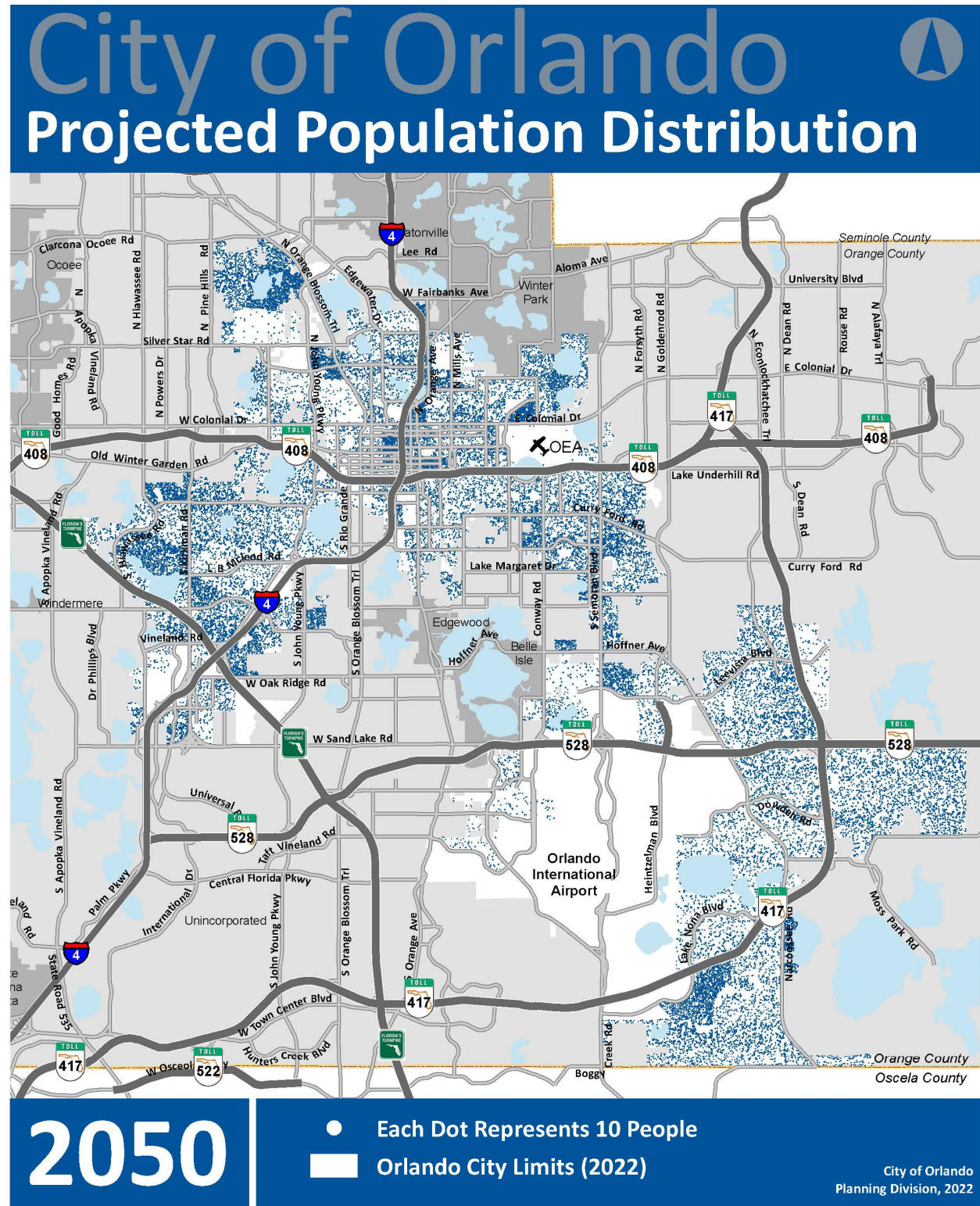
Non-Residential Land Use and Employment Estimates & Projections

The following figures summarize projected office, retail, hotel, industrial, hospital, and civic/government growth, and employment growth, between 2022 and 2050 for each sub-area and for the City of Orlando as a whole. Associated maps graphically depict employment growth for the same timeframe. Please see Appendices C-I for traffic analysis zone specific non-residential and employment projections.

Figure 9 – Summary of Office Space Growth
By Subarea from 2022 to 2050

	January 1, 2022	2050	Change/Growth 2022-2050 (Sq. Ft.)	Change/Growth 2022-2050 (%)
Northwest	2,466,146	3,283,682	817,536	33.15%
Northeast	5,027,982	6,708,335	1,680,353	33.42%
Downtown	15,152,069	17,145,008	1,992,939	13.15%
Southwest	7,990,010	8,618,640	628,630	7.87%
Southeast	5,116,979	10,479,763	5,362,784	104.80%
Orlando Total	**35,753,186**	**46,235,428**	**10,482,242**	**29.32%**

Figure 10 – Summary of Retail Space Growth
By Subarea from 2022 to 2050

	January 1, 2022	2050	Change/Growth 2022-2050 (Sq. Ft.)	Change/Growth 2022-2050 (%)
Northwest	3,465,257	4,220,504	755,247	21.79%
Northeast	5,382,800	4,771,811	-610,989	-11.35%
Downtown	2,443,206	3,088,125	644,919	26.40%
Southwest	15,678,188	15,886,903	208,715	1.33%
Southeast	6,917,392	11,030,105	4,112,713	59.45%
Orlando Total	**33,886,843**	**38,997,448**	**5,110,605**	**15.08%**

Figure 11 – Summary of Hotel Room Growth
By Subarea from 2022 to 2050

	January 1, 2022	2050	Change/Growth 2022-2050 (Rooms)	Change/Growth 2022-2050 (%)
Northwest	786	636	-150	-19.08%
Northeast	419	819	400	95.47%
Downtown	2,084	3,422	1,338	64.20%
Southwest	19,710	21,367	1,657	8.41%
Southeast	5,755	11,576	5,821	101.15%
Orlando Total	**28,754**	**37,820**	**9,066**	**31.53%**

Figure 12 – Summary of Industrial Space Growth
By Subarea from 2022 to 2050

	January 1, 2022	2050	Change/Growth 2022-2050 (Sq. Ft.)	Change/Growth 2022-2050 (%)
Northwest	15,060,280	15,255,282	195,002	1.29%
Northeast	1,896,004	1,816,593	-79,411	-4.19%
Downtown	1,671,971	1,505,295	-166,676	-9.97%
Southwest	14,041,315	14,785,527	744,212	5.30%
Southeast	19,005,841	38,333,070	19,327,229	101.69%
Orlando Total	**51,675,411**	**71,695,767**	**20,020,356**	**38.74%**

Figure 13 – Summary of Hospital Space Growth
By Subarea from 2022 to 2050

	January 1, 2022	2050	Change/Growth 2022-2050 (Sq. Ft.)	Change/Growth 2022-2050 (%)
Northwest	310,897	310,897	0	0%
Northeast	2,760,030	3,710,030	950,000	34.42%
Downtown	117,194	117,194	0	0%
Southwest	2,510,563	3,813,365	1,302,802	51.89%
Southeast	2,081,845	5,090,056	3,008,211	144.50%
Orlando Total	**7,780,529**	**13,041,542**	**5,261,013**	**67.62%**

Figure 14 – Summary of Civic/Government Space Growth
By Subarea from 2022 to 2050

	January 1, 2022	2050	Change/Growth 2022-2050 (Sq. Ft.)	Change/Growth 2022-2050 (%)
Northwest	2,689,056	3,111,677	422,621	15.72%
Northeast	1,940,179	2,103,694	163,515	8.43%
Downtown	4,715,581	5,086,445	370,864	7.86%
Southwest	3,906,245	4,064,774	158,529	4.06%
Southeast	9,015,158	11,817,113	2,801,955	31.08%
Orlando Total	**22,266,219**	**26,183,703**	**3,917,484**	**17.59%**

Figure 15 – Summary of Employment Growth
By Subarea from 2022 to 2050 ("Bottom-Up" from Traffic Zones)

	January 1, 2022	2050	Change/Growth 2022-2050 (Sq. Ft.)	Change/Growth 2022-2050 (%)
Northwest	31,154	35,429	4,275	13.72%
Northeast	38,952	46,216	7,264	18.65%
Downtown	53,975	61,623	7,648	14.20%
Southwest	87,424	95,861	8,437	9.65%
Southeast	77,167	138,432	61,265	79.39%
Orlando Total	**288,673**	**377,562**	**88,889**	**30.79%**

Figure 16 below depicts existing employment distribution as of January 1, 2022, while Figure 17 shows projected cumulative employment growth through the year 2050. These figures identify which areas of the City have, or are projected to have, higher concentrations of employment as compared to other areas of Orlando. Existing employment is located throughout the City, with particularly high concentrations in the Downtown, Advent Health campus in the northwest, Orlando Health campus south of Downtown, in the attractions area along International Drive, and around the Orlando International Airport. A tremendous amount of employment growth is expected in the Southeast Orlando Sector Plan area which includes the Orlando International Airport, the East Airfield Planned Development, the Lake Nona Town Center, and Lake Nona/Medical City. In the Southeast, employment is projected to increase by over 61,265 jobs between 2022 and 2050, representing a 79.39% increase.

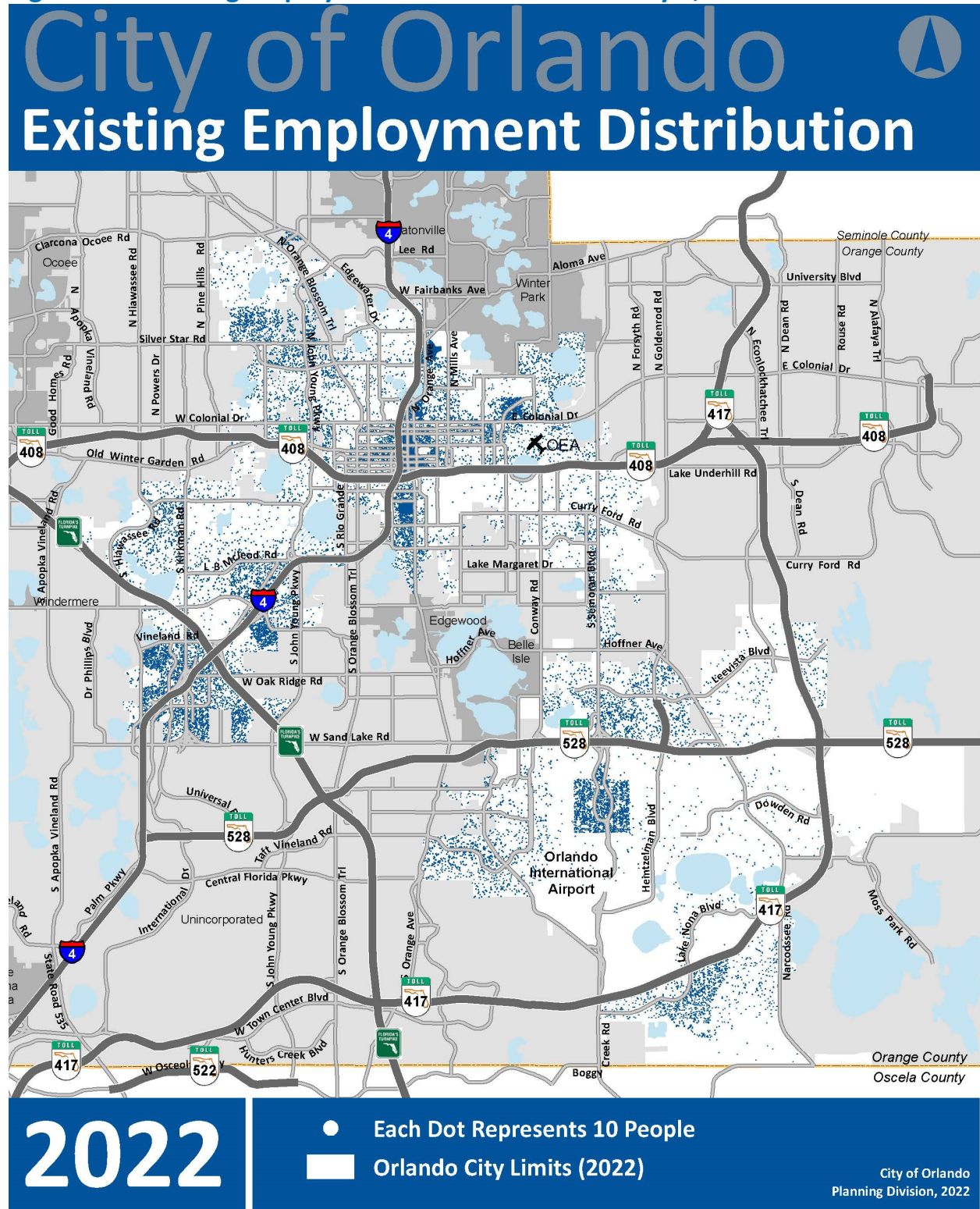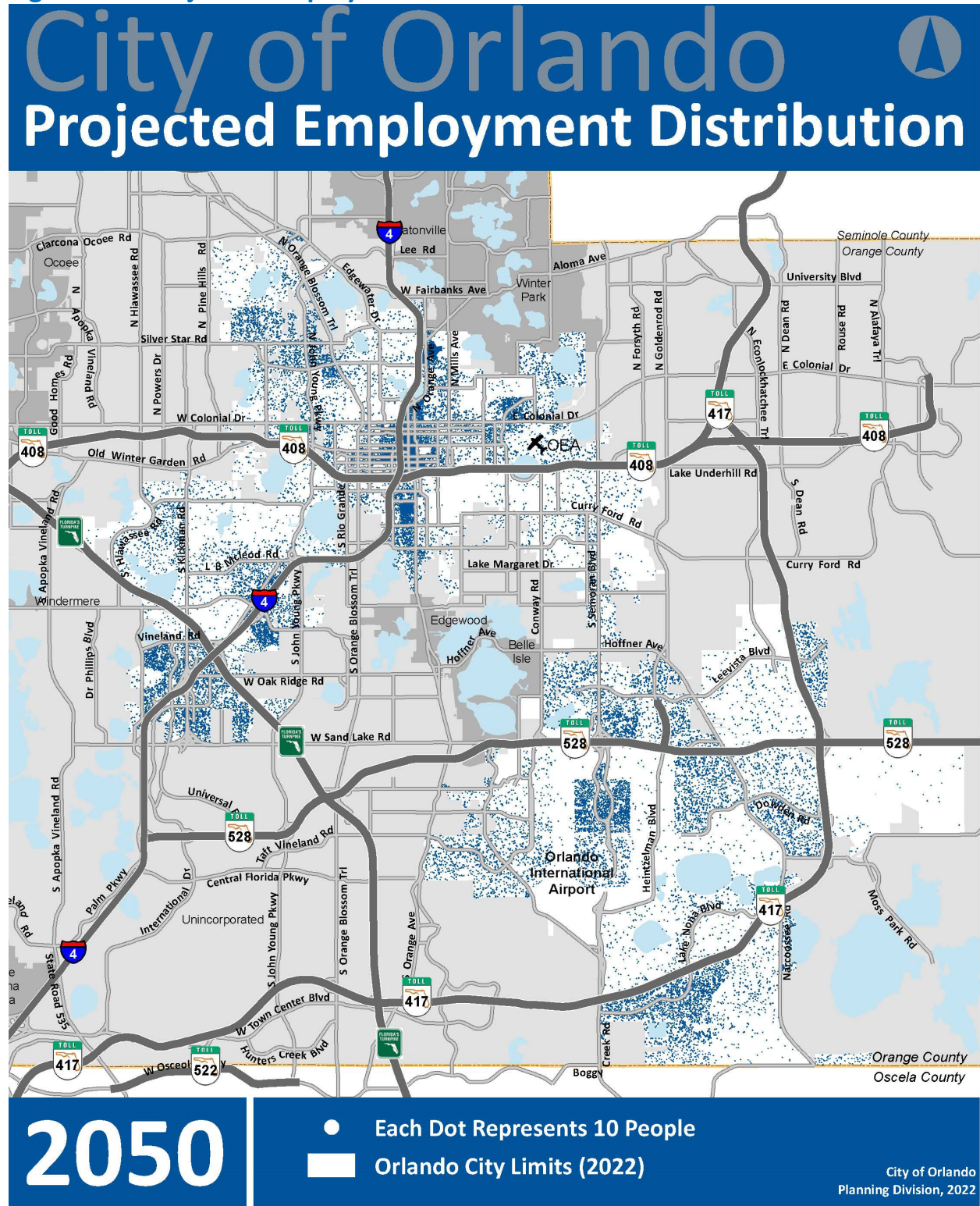**Figure 16 – Existing Employment Distribution – January 1, 2022**

City of Orlando
Existing Employment Distribution

2022

Each Dot Represents 10 People

Orlando City Limits (2022)

City of Orlando
Planning Division, 2022

Figure 17 – Projected Employment Distribution – 2050

City of Orlando
Projected Employment Distribution

2050

• Each Dot Represents 10 People
▬ Orlando City Limits (2022)

City of Orlando
Planning Division, 2022

Service Population Estimates & Projections

Although the University of Florida's BEBR prepares current resident population estimates for the City of Orlando, they do not prepare estimates for what the City refers to as "service population", which includes all those people that may have an impact on City services during any given day. This "service population" (or daytime population), while somewhat difficult to estimate, is much larger than Orlando's resident population and includes tourists, the homeless, and employees (over and above resident employees) that travel to and work in the City during any given day. Service population has an impact on all infrastructure services, particularly Fire and Police. Figure 18 summarizes the City's service population projections for the period 2022-2050. More detailed estimates and projections by traffic analysis zone are presented in Appendix J.

Figure 18 – Summary of Service Population Growth
By Subarea from 2022 to 2050 ("Bottom-Up" from Traffic Zones)

	January 1, 2022	2050	Change/Growth 2022-2050 (Sq. Ft.)	Change/Growth 2022-2050 (%)
Northwest	48,131	75,043	26,912	55.91%
Northeast	44,764	59,167	14,403	32.18%
Downtown	68,897	90,827	21,930	31.83%
Southwest	145,227	165,618	20,391	14.04%
Southeast	155,891	261,026	105,135	67.44%
Orlando Total	**462,910**	**651,681**	**188,771**	**40.78%**

Significant growth in service population is expected in the northwest with the build-out of projects such as the RoseArts PD and Packing District PD, and in the northeast with growth associated with the Advent Health campus and redevelopment of Orlando Fashion Square Mall. Downtown Orlando's service population will increase with continued build-out of Creative Village and significant growth in office space and hotel rooms throughout the Central Business District. In the southwest, it is anticipated that service population will increase with commercial and hotel growth associated with major attractions such as Universal Studios. By far, the greatest amount of service population growth (+105,100) will occur with the continued development in the Southeast Orlando Sector Plan area including expansion of the Orlando International Airport, the build-out of the East Airfield Planned Development, and maturation of the Lake Nona Town Center and Medical City. Overall, it is anticipated that service population will grow by 188,771 between 2022 and 2050.

Notes on Methodology

City Land Use Database (CLUDB)

The January 1, 2022 residential and non-residential base-year data presented in this report are derived from the City Land Use Database (CLUDB), which is a near real-time GIS web application that provides parcel, structure, and occupancy (LSO) information for the entire City of Orlando. CLUDB is updated daily using Certificate of Occupancy, Certificate of Completion, and Demolition reports generated from the City's Infor Permitting System.

Vacant Land Analysis

Using GIS, staff analyzed vacant land by future land use designation and zoning district to identify probable locations for future development and to make realistic projections concerning the amount of development likely to occur on each vacant parcel. For instance, while the zoning of an industrial parcel may permit a maximum 0.7 floor area ratio (FAR), a lower FAR of 0.2 or 0.3 may have been applied if the development pattern in the area has supported much less development in the past. The location of a vacant parcel relative to other planned or existing projects, as well as the presence of known environmental constraints were also considered in projecting the site's development potential. Such factors were carefully considered in formulating realistic forecasts for development of the City's remaining vacant land.

Redevelopment Analysis

In addition to vacant land, redevelopment potential within the City's Activity Centers and Mixed Use Corridors was also analyzed. The methodology consisted of querying Orange County Property Appraiser (OCPA) data for all parcels in those areas and deleting those less than 0.1 acres in size. That data was further sifted be selecting all parcels with a structure value to total assessed value ratio of 0.25 and below (less than 0.25), and then removing all parcels with non-residential or non-commercial Department of Revenue (DOR) Use Codes (including Utilities, Government/State, Recreation Building/Recreation Tracts, Parking/Service Garage, Municipal, Lease Interest, County, Communication Towers, Charitable, Religious, and Lodge/Union Hall). Then, those parcels where the structure was built after the year 2005 were removed. This process resulted in the identification of approximately 270 potential redevelopment sites.

A site-specific, contextual analysis of each of those sites was then conducted using a newly developed web-based GIS redevelopment tool. The analysis included a comparison of known projects to ensure there was no potential over-projection issues, an examination of adjacent property ownership to determine if aggregation of properties has occurred (a reliable sign of

redevelopment potential), and then a comparison of existing floor area ratios (FARs) and residential densities to the intensities and densities allowed on the parcel's future land use designations and zoning classifications. Using this information, it was possible to differentiate, identify, and map those parcels considered highly likely, moderately likely, less likely, and not likely to redevelop, and then to make some assumptions relating to timing of such potential redevelopment.

Control Numbers

A "top down/bottom up" approach was used to develop the population and employment projections, establishing Orange County and City-wide estimates and projections to use as a check against the detailed small area (traffic analysis zone) estimates and projections found in the appendices of this report.

<u>City Wide Population Projections</u>
- For population, historical population estimates for Orange County and Orlando were taken from the official decennial U.S. Census (1970 through 2020). Non-Census estimates for the years 1985 through 2021 were derived from official University of Florida – Bureau of Economic & Business Research (BEBR) estimates.
- Projections for Orange County from 2025 through 2050 were derived from BEBR's "Projections of Florida Population by County, 2025-2050, with Estimates for 2021", Florida Population Studies, Volume 55, Bulletin 192, February 2022.
- Since BEBR does not provide City-level projections, staff determined future City population by using a share of growth analysis.
- Orlando's share of Orange County population decreased by an average of 0.4 percentage points per annum between 1970 and 2000 (28.75 – 20.75 = 8/20 = 0.4). However, between 2000 and 2021, Orlando's share of Orange County population grew from 20.75% to 21.54%, a 0.79 percentage point increase.
- Taking into consideration the densification of projects within Downtown, RoseArts, the Packing District, Lake Nona, and other high growth areas, the City is assuming that an approximate 1.52 percentage point increase in the City share of Orange County will occur between January 1, 2022 and 2050 (from 21.54% to 23.06%).
- Orlando's adjusted share of Orange County population for each five-year period through 2050 served as the City-wide control numbers used to verify staff's subarea and traffic analysis zone-level projections (see Figure 19).

Figure 19 – 2022-2050 Population Control Numbers

Year	Orange County Population	Orlando Population "Share"	Orlando's Ratio "Control"
1970	344,311	99,006	28.75%
1980	470,865	128,291	27.25%
1985	556,445	146,491	26.33%
1990	677,491	164,693	24.31%
1995	765,906	170,307	22.24%
2000	896,344	185,951	20.75%
2005	1,050,333	217,567	20.71%
2010	1,145,956	238,200	20.79%
2015	1,252,396	262,372	20.95%
2020	1,429,908	307,573	21.51%
2021	1,457,940	313,975	21.54%
2025	1,577,700	360,000	22.82%
2030	1,704,700	407,000	23.88%
2035	1,807,000	436,000	24.13%
2040	1,893,400	451,000	23.82%
2045	1,969,000	462,000	23.46%
2050	2,038,200	470,000	23.06%

City Wide Employment Projections

- Orange County Total Employment includes all job categories, including farm, agricultural services and mining.
- The 1970 through 2022 employment estimates for Orange County, as well as the 2025 through 2050 projections for Orange County, were derived from the Woods and Poole – 2021 Florida State Profile.
- 1970 through 1990 City of Orlando employment estimates were derived from the 1991

Growth Management Plan, while the 2000 through 2022 City employment estimates were derived from Orlando's City Land Use Database, various years.

- In developing employment control numbers for this report, the City again utilized a share of growth methodology.
- Orlando's share of Orange County Total Employment increased slightly from 1970 to 1980, primarily due to the annexation of the Orlando International Airport. There was an overall decline in Orlando's share of Orange County employment between 1970 and 2022 of 13.29 percentage points (52 years; 0.255 percentage points per year).
- It is anticipated that Orlando's share of Orange County employment will gradually decrease between 2022 and 2050 (by 4.99 percentage points, or 0.178 percentage points per year).
- Orlando's adjusted share of Orange County employment for each five-year period through 2050 served as the City-wide control numbers used to verify staff's subarea and traffic analysis zone-level projections found in the appendices of this report (see Figure 20).

Figure 20 – 2022-2050 Employment Control Numbers

Year	Orange County Total Employment	Orlando Total Employment "Share"	Orlando's Ratio "Control"
1970	171,594	60,584	35.31%
1980	291,165	107,563	36.94%
1990	516,944	154,950	29.97%
2000	735,813	196,778	26.74%
2010	822,557	235,430	28.62%
2022	1,250,906	288,637	23.07%
2025	1,334,500	306,000	22.93%
2030	1,478,072	329,500	22.29%
2035	1,625,617	351,500	21.62%
2040	1,776,763	365,000	20.54%
2045	1,931,525	374,000	19.36%
2050	2,090,783	378,000	18.08%

Population & Employment Multipliers

Multipliers were developed to convert residential (dwelling units) and non-residential (square footage, hotel rooms) land use estimates and projections into population and employment forecasts. This conversion was necessary to compare the "bottom up" traffic analysis zone-level land use projections against the "top down" City-wide control numbers mentioned previously.

Population Projections
- For residential uses, the total number of single-family and multifamily housing units in each traffic zone (existing and projected) were multiplied by standard occupancy rates (0.9750 for single family; 0.962 for multifamily; derived from 2020 U.S. Census) and by variable persons per unit multipliers to determine a population for each traffic zone. The traffic zone estimates and projections were then aggregated to the City-wide level.
- Rather than using City-wide average persons per unit multipliers, variable persons per unit multipliers were determined by comparing 2020 Census Tract data to the closest approximate traffic zone boundary. While the average method vs. census tract/traffic zone specific method essentially results in the same total City resident population, it was determined that the census tract/traffic zone-specific method provides a more accurate and realistic picture of where residential population exists throughout the City. As an example, the census tracts in the Downtown core have much lower persons per unit numbers than census tracts in suburban areas. Such locational differences are particularly important in terms of parks & recreation planning and in school planning. The result is a more spatially accurate set of population estimates and projections.

Employment Projections
- In the non-residential category, the amount of existing and projected square footage, or rooms in the case of hotels, was multiplied first by occupancy rates and then by non-residential land use square footage to employment conversion factors.
- Occupancy rates of 85% for office, industrial, and hospital, 90% for retail, 70% for hotel, and 50% for civic/government land use categories were used for the January 1, 2022 estimate and projections through 2050. The 50% rate for civic/government considers church properties.
- The following non-residential square footage to employment conversion factors were utilized:
  - Office – 1 employee per 290 square feet
  - Retail – 1 employee per 425 square feet
  - Hotel – 0.5 employees per room
  - Industrial – 1 employee per 900 square feet

- Hospital – 1 employee per 230 square feet
- Civic/Government (Non-OIA) – 1 employee per 1,430 square feet
- Civic/Government (Orlando International Airport; OIA):
  - (OIA Terminal) – 328 employees/MAP (million annual passengers)
  - (OIA Terminal Support) – 62 employees/MAP (million annual passengers)
    Employment estimates and projections for the Orlando International Airport were generated differently, using a set of multipliers based on annual passenger traffic. The OIA multipliers were provided by the Greater Orlando Aviation Authority and were also used by MetroPlan Orlando for regional transportation planning purposes.

Service Population (Day-Time Population) Assumptions

Service population is comprised of the following component parts: resident population, homeless people, tourists, and a percentage of outside or attendant employment.

- Estimates and projections for the homeless population were based on national surveys and studies which recommend using 1% of the resident population in urbanized area to determine the number of homeless people; however, because many health and social services for the homeless are in Downtown Orlando, it can be surmised that a greater concentration is present in that specific area. For purposes of this analysis, an assumed percentage of 3% was applied to resident population estimates and projections in the Downtown area, and 1% for the remainder of the city to derive the number of homeless people through 2050.
- For tourists, staff assumed a hotel room occupancy rate of 70%. The persons per hotel room variable was determined by splitting visitor arrivals into two categories; those that arrive by automobile, and those that arrive by air. Based on State of Florida visitor arrival estimates, it was calculated that there are approximately 2 persons per hotel unit in Orlando.
- Attendant employment (over and above resident employment) is the final component in determining service population. Based on commuting patterns, there are more workers commuting into the City of Orlando than leaving the City during any given day. Staff has estimated that 75% of Orlando residents work in Orlando, except for the Downtown area, where there are more people traveling from outside the City to their workplaces. Therefore, additional attendant employment was based on 75% of the employment population for the Downtown area, and 25% of the employment population for the remaining areas.