

## HOUSING DATA, INVENTORY, AND ANALYSIS



CHERISH AND SUSTAIN WINTER PARK'S EXTRAORDINARY QUALITY OF LIFE

PLAN OUR GROWTH THROUGH A COLLABORATIVE PROCESS THAT PROTECTS OUR CITY'S TIMELESS SCALE AND CHARACTER

ENHANCE THE WINTER PARK BRAND THROUGH A FLOURISHING COMMUNITY OF ARTS AND CULTURE

BUILD AND EMBRACE OUR LOCAL INSTITUTIONS FOR LIFELONG LEARNING AND FUTURE GENERATIONS

### Introduction

The purpose of the Housing Element data inventory and analysis component is to identify housing trends and needs from which goals, objectives, and policies can establish actions and programs that guide housing development within the City of Winter Park. This element provides a statistical and qualitative evaluation of the characteristics and conditions of the existing housing stock within Winter Park.

Several data sources were used to compile this analysis. The principal data sources include the 2020 Census and the 2021 American Community Survey (ACS), prepared by the US Department of Commerce, the Florida Housing Data Clearinghouse (FHDC), and the Orange County 2022 certified tax rolls. These specific resources are applied as they comprise some of the most current or accurate information available for the purposes described. The analysis also relies substantively on the work of Miami Economics Associates, Inc. (MEAI) to link key housing variables drawn from these data sources with measures of income and housing affordability.

- The actual census is completed every ten years and remains the standard for allocating a number of federal resources, and it is the basis for congressional districting. The data are deemed reliable in terms of their detailed profile of the community's housing inventory, tenure, age, and structural characteristics. As a community that is largely fully developed, these attributes change modestly from one period to another. To the degree these changes may have significance, they are captured in the ACS and the area's local tax roll.
- Certain data within the census, reported only every ten years, is updated on a selected basis in the course of completing the ACS, with samples made available for analysis on a 1, 3, and 5-year cycle. The ACS was fully implemented in 2010. This change in estimating and reporting procedures makes certain socioeconomic information available on a continuing basis which had otherwise been generated strictly during the decennial census. Of relevance to this analysis, in particular, are the recently released data on area income and population.
- The FHDC is the most exhaustive source of information on Florida's supply of subsidized rental housing, but the organization is also a gateway to other resources. Additional data from FHDC include the above-mentioned U.S. Census, other federal population, and housing surveys, the U.S. Department of Housing and Urban Development, the U.S. Department of

Agriculture Rural Housing Service, Florida Housing Finance Corporation, local housing finance authorities, Public Housing Agencies, the Florida Association of Realtors, the Florida Department of Revenue, the Florida Agency of Workforce Innovation, and the Bureau of Economic and Business Research at the University of Florida

- Orange County's tax rolls, maintained as the public record of the area's tax base, are a valuable source of current housing and property valuations. Because this data directly and explicitly impacts every local government's budget and financial planning process, it is deemed relevant and correct for the purposes used.
- The City of Winter Park and Orange County Department of Community Development and Housing maintain their respective records of housing building and development activity.

Where any of this data warrants further clarification, confirmation, qualification, or discussion, that amplification appears in the appropriate area of the analysis. Specific sources of key data appear systematically in footnotes located at the bottom of each table or at the bottom of the same page on which the table appears.

## Housing Inventory

This section presents an inventory of housing trends and characteristics, describing in particular certain housing conditions and potential resources typically linked to those conditions. Differences may appear in specific figures for housing data totals. The difference or inconsistency results from using US Census sample data versus complete (100%) census survey data.

### Housing Characteristics and City-to-County Comparisons

Tables 3-1 through 3-15 of this section provide an inventory and comparison of housing characteristics for the City of Winter Park and Orange County. Data appearing for Orange County represents the entire county, including all unincorporated and incorporated areas as well as Winter Park.

### Dwelling Units by Structure Type

Table 3-1 of this section denotes a comparison of dwelling units by structure type for the City of Winter Park and Orange County. The proportional share of housing distributed between single- and multiple-family structure types is similar between the City and the County. In comparing Winter Park with the County, the only significant difference in housing structure types is the number of mobile homes. The City has significantly fewer mobile homes.

The City has a ratio of slightly more than two single-family homes for every one multi-family home. Vacant land is estimated at about 247.86 acres. About half of the acreage is zoned for residential use; however, there are existing conservation easements on several large parcels owned by the Elizabeth Morse Genius Foundation that preclude development. Multiple-family units are anticipated to represent a greater share of new housing construction than single-family homes. This housing trend projection may be supported by proposed land use policies and zoning regulations allowing residential use to occur above ground-level retail and office uses in some areas of the City.

<b>Table 3-1: Estimated Dwelling Units by Structure Type, 2021 — All Units</b>				
<b>DWELLING UNITS</b>	<b>WINTER PARK</b>		<b>ORANGE COUNTY</b>	
	<b>NUMBER</b>	<b>%</b>	<b>NUMBER</b>	<b>%</b>
Single-family	9,623	68.8	348,310	62.8
Multi-family	4,353	31.1	187,171	33.8
Mobile Homes	10	0.1	18,710	3.4
Other	0	0	326	0.1
<b>TOTAL DWELLING UNITS</b>	<b>13,986</b>	<b>100.0</b>	<b>554,517</b>	<b>100.0</b>

Source: U.S. Census Bureau, 2021 American Community Survey 5-Year Summary File

**Tenure**

Based on the 2021 American Community Survey 5-Year Summary File, Table 3-2 denotes a comparison between owner-occupied dwelling units and renter-occupied dwelling units in the County and in the City. As shown in Table 3-2, approximately 66.8% of the City’s occupied dwelling units are occupied by the owner, while renters occupy approximately 33.2% of the occupied dwelling units in the City. Table 3-2 also evidences that approximately 56.5% of Orange County’s occupied dwelling units are occupied by the owner, while renters occupy approximately 43.5% of the occupied dwelling units in the County.

<b>Table 3-2: Estimated Housing Units by Tenure, 2021 — All Units</b>						
<b>TENURE</b>	<b>WINTER PARK</b>			<b>ORANGE COUNTY</b>		
	<b># OF UNITS</b>	<b>UNITS % OF TOTAL</b>		<b># OF UNITS</b>	<b>UNITS = % OF TOTAL</b>	
		<b>TOTAL HOUSING UNITS</b>	<b>OCCUPIED HOUSING UNITS</b>		<b>TOTAL HOUSING UNITS</b>	<b>OCCUPIED HOUSING UNITS</b>
<b>Occupied Units</b>	12,462	89.1%	100.0%	475,292	85.7%	100.0%
Owner-Occupied	8,330	59.5%	66.8%	268,761	48.5%	56.5%
Renter-Occupied	4,132	29.5%	33.2%	206,531	37.2%	43.5%
<b>Vacant</b>	1,524	10.9%	n/a	79,225	14.3%	n/a
<b>TOTAL UNITS</b>	<b>13,986</b>	<b>100.0%</b>	<b>n/a</b>	<b>554,517</b>	<b>100.0%</b>	<b>n/a</b>

Source: U.S. Census Bureau, 2021 American Community Survey 5-Year Summary File

**Persons per Household**

The 2020 US Census reported that the City averages 2.25 persons per household with an average family size of 2.93. Table 3-3 lists households according to the number of persons comprising a household.

<b>Table 3-3: Persons per Household</b>	
<b>PERSONS PER HOUSEHOLD</b>	<b>NUMBER OF HOUSEHOLDS</b>
<b>Total Households:</b>	<b>12,462</b>
1-person household	4,553
2-person household	4,714
3-person household	1,312

4-or-more-persons household	1,883
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Source: 2020 US Census

**Vacancy Rate**

Based on the 2020 US Census, the City experienced a vacancy rate of 10.9% for all housing units, a figure slightly lower than that experienced by the County, which had a 14.3% vacancy rate. Table 3-4 shows the number of vacant housing units according to the circumstances creating vacant units. Just over three percent of all residential units in Winter Park were vacant because the home was for sale. This housing characteristic likely indicates a quick turnover in home sales and a stronger demand to purchase homes in the Winter Park housing market than in the County as a whole.

<b>Table 3-4: Vacancy Status of Housing Units</b>				
<b>HOUSING UNITS</b>	<b>WINTER PARK</b>		<b>ORANGE COUNTY</b>	
	<b>NUMBER OF UNITS</b>	<b>%</b>	<b>NUMBER OF UNITS</b>	<b>%</b>
Total Housing Units	13,986	100.0%	554,517	100%
Total Vacant Housing Units	1,524	10.9%	63,357	11.4%
For rent	441	3.1%	25,007	4.5%
For sale only	433	3.1%	5,349	0.9%
Rented or sold but not occupied	109	0.8%	4,154	0.7%
For seasonal, recreation, or occasional use	274	1.9%	17,722	3.2%
Other vacant	267	1.9%	11,125	2.0%

Source: 2020 US Census, sample data

**Age of Housing Units**

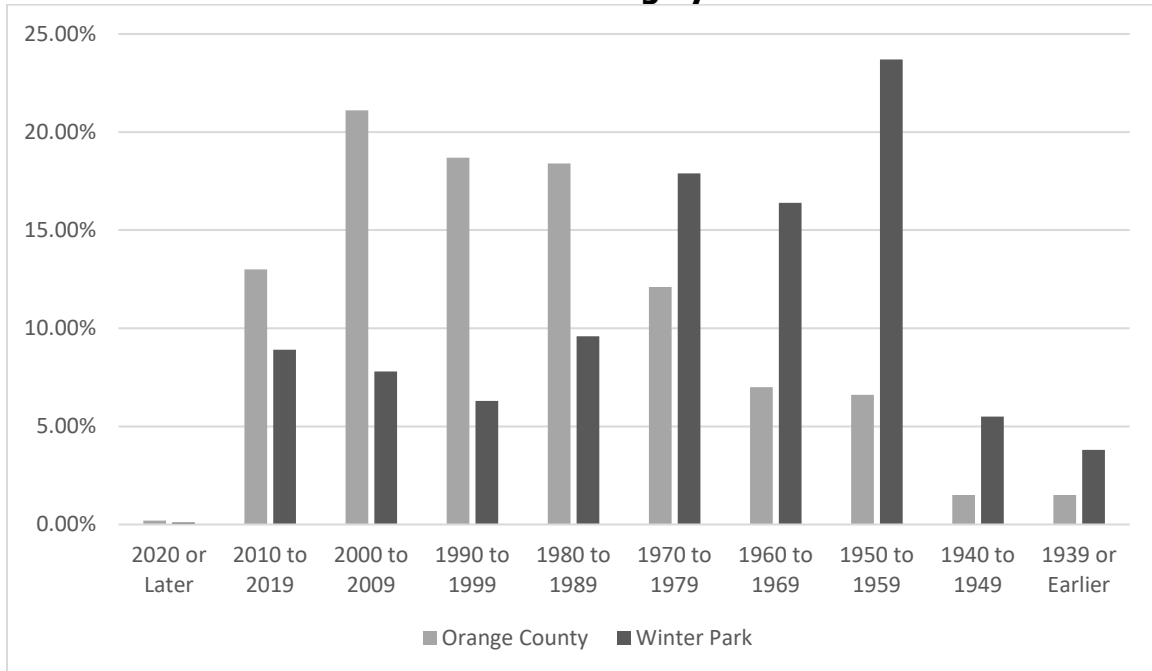
Tables 3-5 and 3-6 compare the age of year-round housing units in the City of Winter Park and Orange County. As denoted in Table 3-5, the largest share of Winter Park’s housing stock (58%) was constructed between 1950 and 1980, while over 70% of the County’s housing stock was constructed after 1980. The housing stock in Winter Park is generally older than that within the County. With limited vacant land in the City, its residential growth rate has curtailed substantially in the last two decades while residential growth has moved to other areas of the County where vacant land is more abundant.

<b>Table 3-5: Construction Date of Housing Units</b>				
<b>YEAR OF CONSTRUCTION</b>	<b>WINTER PARK</b>		<b>ORANGE COUNTY</b>	
	<b># OF UNITS</b>	<b>PERCENTAGE</b>	<b># OF UNITS</b>	<b>PERCENTAGE</b>
2020 or Later	9	0.1%	1,084	0.2%
2010 to 2019	1,238	8.9%	71,833	13.0%
2000 to 2009	1,095	7.8%	117,112	21.1%
1990 to 1999	887	6.3%	103,688	18.7%
1980 to 1989	1,339	9.6%	102,036	18.4%
1970 to 1979	2,498	17.9%	66,958	12.1%
1960 to 1969	2,291	16.4%	38,700	7.0%
1950 to 1959	3,321	23.7%	36,615	6.6%
1940 to 1949	774	5.5%	8,303	1.5%

1939 or Earlier	534	3.8%	8,188	1.5%
<b>TOTAL</b>	<b>13,986</b>	<b>100%</b>	<b>554,517</b>	<b>100%</b>

Source: U.S. Census Bureau, 2017-2021 American Community Survey 5-Year Summary File

**Table 3-6: Distribution of Housing by Year of Construction**



Source: U.S. Census Bureau, 2017-2021 American Community Survey 5-Year Summary File

**Housing Conditions**

An inventory of the City's housing stock was accomplished through a review of the 2020 Census of Population and Housing Data. The 2020 US Census provided information regarding dwelling units lacking complete plumbing facilities, dwelling units lacking complete kitchen facilities, dwelling units lacking central heating facilities, dwelling units lacking air conditioning, and overcrowded dwelling units. A summary of the housing conditions for the City of Winter Park is shown in Table 3-7. Although the City promotes and enforces housing conditions consistent with or exceeding City codes, substandard housing conditions do occur but only in isolated areas within the City, as described in another section presented below. All new housing construction or reconstruction must conform to the City's adopted building codes. Minimum property standards follow standard housing conditions as defined in the City's adopted building codes and as established by the State of Florida.

CRITERIA	NUMBER OF UNITS	SHARE OF TOTAL UNITS
Lack of complete plumbing	12	0.1%
Lack of complete kitchen	112	0.9%
Lack of central heating	292	2.3%

Overcrowding <sup>1</sup>	51	0.4%
Total Housing Units <sup>2</sup>	12,462	3.7%

Source: U.S. Census Bureau, 2017-2021 American Community Survey 5-Year Summary File

<sup>1</sup>Units with over one person per room.

<sup>2</sup>Occupied housing units

Recent housing construction trends in Winter Park show that older homes are demolished and replaced with new structures constructed under current building codes. Based on this trend, overall housing conditions should improve. However, the annexation of land into the City since 2000 included older homes constructed under obsolete building codes.

Many substandard housing incidents occur in neighborhoods or homes where households may qualify for assistance from Orange County or the Winter Park CRA to complete repairs and maintenance to the structure. The City is aware of areas where substandard housing occurs or has a history of occurrence. While the majority of the known substandard housing units are concentrated within neighborhoods where the City and County have targeted housing assistance programs or improvement activities, a smaller number of substandard housing units occur as isolated incidents temporarily emerge in other neighborhoods.

Enforcement of building and property codes sometimes requires eviction of low-income households, many of whom may have a challenge finding affordable housing given their household income. The City recognizes that it must continue to work with property owners and tenants to address alternative housing options when enforcement may require tenant eviction. The City understands that, in some cases, it must exercise compassion to ensure sufficient opportunities for tenants to find alternative housing.

**Housing Costs & Affordability**

Given strong perceptions about Winter Park’s very high cost of housing, the City opted to retain MEAI to evaluate the relationship among income, tenure, and expenditures for both owner and renter-occupied units. The bulleted paragraphs below are an excerpt from MEAI’s final report published in September 2016. The following bulleted paragraphs and tables were updated per FY 2023 data provided by the U.S Department of Housing and Urban Development.

- The term “Affordable Housing” relates to shelter that is accessibly-priced for households of very low, low, and moderate-income at a cost that does not exceed 30 percent of their income. Table 3-10 defines the terms “very low,” “low,” and “moderate” income as income ranges relative to Area Median Income (AMI), which are the figures that generally guide federal housing programs. According to the U.S. Department of Housing and Urban Development, AMI is currently \$85,700 in Orange County, Florida. Table 3-10 also shows the income range associated with each of those income categories. Finally, it provides the definition of “Workforce Housing” and its associated income range.

**Table 3-10: Housing Income Categories**

INCOME CATEGORY	DEFINITION	INCOME RANGE
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Very Low Income	Up to 50% of AMI	</= \$42,850
Low Income	50-80% of AMI	\$42,851 – \$68,560
Moderate Income	80-120% of AMI	\$68,561 – \$102,840
Workforce Income	120-145% of AMI	\$102,841 – \$124,265

Source: U.S. Department of Housing and Urban Development; Miami Economic Associates, Inc.

- Table 3-11 shows the amount of rent households of very low, low, moderate, and workforce income can afford to pay on a monthly basis while not spending more than 30 percent of their monthly income on their living unit.

**Table 3-11: Accessible Rental Rate Ranges by Income Category**

INCOME CATEGORY	MONTHLY INCOME	RENTAL RANGE
Very Low Income	</= \$3,570	</= \$1,071
Low Income	\$3,571 - \$5,713	\$1,072 – \$1,713
Moderate Income	\$5,714 - \$8,570	\$1,714 – \$2,571
Workforce Income	\$8,571 - \$10,355	\$2,572 – \$3,106

Source: Miami Economic Associates, Inc.

- The American Community Survey for the 2017 – 2021 period conducted by the U.S. Census Bureau estimated that the City of Winter Park contained a total of 4,132 rental units. Of this total, cash rent was being paid on 4,004 units. The remainder were either vacant or occupied with no cash rent being paid. Approximately 95 percent of renter-occupied units are accessibly priced for a household at the top of the workforce income range, including approximately 23 percent that is accessibly priced for households at the top end of the very low-income range, approximately 75 percent for a household at the top end of the low-income range and nearly 93 percent for a household at the top end of the moderate-income range.

**Table 3-12: Distribution of Rental Units by Gross Rent City of Winter Park 2021**

GROSS RENT	NUMBER	PERCENT	CUMULATIVE PERCENT
Less than \$500	202	4.9	4.9
\$500 – 749	222	5.4	10.3
\$750 – 999	529	12.8	23.1
\$1,000 – 1,249	868	21.0	44.1
\$1,250 – 1,499	861	20.8	64.9
\$1,500 – 1,999	818	19.8	84.7
\$2,000 or more	504	12.2	96.9
No cash rent	128	3.1	100.0
<b>TOTAL</b>	<b>4,132</b>	<b>100.0</b>	-

Source: U.S. Census Bureau, American Community Survey 2017 - 2021

- For households with poor credit ratings and those that are overleveraged, the solutions are highly limited and generally not governmentally-based. There are, however, governmental programs that can significantly reduce the amount of the down payment required. Illustratively, in some instances, a VA mortgage can be obtained with no down payment required, while an FHA mortgage may have a down payment requirement as low as 3.5 percent. However, the amount of the down

payment required by either of these programs varies depending on the credit-worthiness of the borrower and as it increases, the amount of the down payment may continue to be an impediment to purchasing an accessibly-priced unit. It should also be noted that these programs have other aspects that can affect the potential borrower negatively, including the following:

- The VA loan program may only be accessed by individuals who have served in the military at a level that meets the program's eligibility requirements. Individuals who do not meet those requirements would need to focus their attention on the FHA loan program.
- To the extent that the mortgage is issued subject to a down payment of less than 20 percent, the borrower will be required to obtain mortgage insurance at a rate that will vary depending on the borrower's credit rating. The cost of the mortgage insurance will be considered along with principal and interest, real estate taxes, and liability insurance when calculating whether the unit being sought can be carried for 30 percent or less of the prospective borrower's income. As will result, it will reduce the amount that the prospective borrower can afford to pay for a unit, albeit not significantly.
- To the extent that a borrower makes a down payment of less than 20 percent, the amount paid for principal and interest will increase, again reducing the amount that a prospective buyer can afford to pay for a home. Depending on how much less than 20 percent the down payment is, the impact on the affordable price of a unit may be significant.

### **Inventory of Housing Assistance Programs**

Recognizing that there may be financial needs, several housing assistance programs are available for qualifying households residing within the City of Winter Park. Housing assistance programs are available through the City of Winter Park, the Winter Park Community Redevelopment Agency, Orange County Division of Housing and Community Development, the Florida Department of Community Affairs and other State offices, and the US Department of Housing and Urban Development (HUD). An inventory and description of housing assistance programs provided by the city are listed below, but should not be construed as all-inclusive.

#### **a. Affordable Housing Linkage Fees**

The City Commission adopted a linkage fee or building permit surcharge in the amount of 50 cents (\$0.50) per square foot on new buildings and additions to buildings to establish a funding source used to help implement the City's affordable and workforce housing programs. This fee is assessed to non-residential and certain residential development. Winter Park is the first community in Florida to have adopted and implemented an affordable housing linkage fee.

These funds have gone to a number of not-for-profit groups in the community, including Habitat for Humanity, the Hannibal Square Community Land Trust, and the Winter Park Housing Authority to help fund homes in Winter Park.

#### **b. Promotion of Private Sector Affordable Housing Projects**



The City has embraced a proactive approach to supporting affordable housing offered by private sector housing developers. The City offers density bonuses within the Orange Avenue Overlay District to promote slightly higher density for affordability. Winter Park Oaks is a residential subdivision specifically designed to accommodate affordable single-family housing. This subdivision was constructed by a private developer and provided forty lots for affordable single-family homes.

**c. Public Assistance Awareness**

The City has made information available to very low, low, and moderate-income households regarding housing assistance programs administered by the County as well as affordable housing programs sponsored by the City. The City also coordinates with community leaders for neighborhoods targeted for community assistance to link housing and infrastructure improvement needs with applicable assistance programs.

**d. Not-for-profit Organizations**

The City has several not-for-profit partners that are providing both affordable and workforce housing opportunities in the community. This list may not be inclusive, but includes those organizations that have received either CRA funds and/or city funding.

- **Community Land Trust**

In 2004, the City established the not-for-profit Hannibal Square Community Land Trust (HSCLT) to provide sustainable, affordable housing in the Winter Park Community Redevelopment Area (CRA). The HSCLT has constructed 20 homes within the CRA and received over \$4 million from the City and the CRA to promote affordable housing in the Hannibal Square neighborhood. The HSCLT is currently revising its strategic plan.

- **Winter Park Housing Authority**

Housing is provided for very low and low-income households through the Winter Park Housing Authority (Housing Authority). Under the HUD Section 23 Leased Housing Program, the Housing Authority manages two apartment complexes; Margaret Square Apartments provides 119 units for qualifying families, and Tranquil Terrace Apartment provides 52 units for qualifying elderly residents.

- **Habitat for Humanity**

Habitat for Humanity is a global volunteer organization that, together with other sponsors, such as local churches, schools, and private companies, provides materials and labor to construct new single-family homes. Within Winter Park, Habitat for Humanity has constructed over 40 homes for families that make less than 50% of the median income.

**e. Homeowner Rehabilitation Program**

Low and very low-income households may qualify for deferred loans to rehabilitate single-family housing units needing repair and upkeep to remedy a major building code violation through the Winter Park CRA. This program has funded 155 housing

rehabilitation projects since 1995.

**f. Weatherization Program**

The Sustainability Division of the City's Natural Resources Department has offered a weatherization pilot program to help low-income residents of the City of Winter Park lower their energy bills in conjunction with the Orange Audubon Society, supported by a \$64,000 Toyota® TogetherGreen by Audubon grant. Orange Audubon and City of Winter Park Sustainability staff partnered with area churches to engage residents in this energy bill and greenhouse gas reduction effort.

The program allowed forty City of Winter Park electricity customers to secure energy efficiency improvements with no upfront costs. Retrofits were also performed on five area churches and one nursery, including Welborne Avenue Nursery, Flowers Temple and Annex, New Fellowship Church of God, Ward Chapel, and two of Winter Park's oldest churches, Bethel Baptist Church and Mt. Moriah Baptist Church. Sixty participants attended one of eight energy efficiency workshops, learned simple measures to implement, and signed a pledge agreeing to implement some of these practices. Workshop participants were given weather-stripping and caulking materials and were given a chance to practice their use.

Weatherization, insulation, and duct repair were the most common retrofits performed, determined to be most cost-effective in an earlier energy efficiency retrofit program administered by Orange County. The grant-funded pilot was modeled on the Orange County Homeowners Energy Efficiency Program (OCHEEP), which used the American Recovery and Reinvestment Act of 2009 funding to provide retrofits and energy efficiency education to nearly 2,500 Orange County residents from 2010–2012. Reductions in greenhouse gas emissions and information to promote the benefits of energy efficiency are the overall goals of the program. Energy usage must be compared with usage in the same month in successive years in order to have roughly comparable environmental conditions. As funding becomes available, it would be desirable to expand the pilot to include more residences, including low-income and historic structures.

**Special Housing Needs**

Special housing needs are necessary for the elderly, children, and those adults who have physical and/or emotional needs that require special residential accommodations. The type of residential accommodation varies based on the person's physical and emotional needs. Such residential accommodations may or may not demand on-site professional medical assistance, twenty-four-hour assistance, or other special facilities. In some cases, special housing situations can involve a group of unrelated residents sharing living accommodations because their physical or emotional needs require special services or assistance from other group members.

The State of Florida has adopted laws that control local government regulation of certain residential facilities serving special needs groups. The law ensures that there are adequate sites for group homes in every community throughout the state. Special housing needs for certain members of Winter Park's residents can include nursing homes or group homes. Group homes

can be further defined as assisted living facilities, community residential homes, or family foster homes.

Based on records maintained by the State Agency for Health Care Administration and the State’s Facility Locator, Table 3-13 lists nursing homes and assisted living facilities located within or close to the City of Winter Park. Locations of foster family home sites are kept confidential.

**Table 3-13: Inventory of Assisted Living Facilities and Nursing Homes in or near Winter Park**

<b>RESIDENTIAL CARE FACILITY/ GROUP HOME</b>	<b>LOCATION</b>	<b>BEDS</b>	<b>TYPE OF HOUSING SERVICE</b>	<b>INSIDE/ OUTSIDE CITY LIMITS</b>
Aiden Springs	5520 Howell Branch Road	25	Assisted Living Facility	Outside
Alabama Oaks at Winter Park	1759 Alabama Drive	19	Assisted Living Facility	Inside
Allegro Winter Park	2701 Howell Branch Road	105	Assisted Living Facility	Outside
Anne’s Home Winter Park	1554 Dodd Road	6	Assisted Living Facility	Outside
Fremont Manor	909 Fremont Avenue	12	Assisted Living Facility	Outside
Hibiscus Oaks, LLC	1385 Hibiscus Avenue	6	Assisted Living Facility	Inside
Marie’s Manor, Inc	4934 Seminole Avenue	6	Assisted Living Facility	Inside
Mayflower Assisted Living Facility	1620 Mayflower Court	55	Assisted Living Facility	Inside
Mayflower Healthcare Center	1850 Mayflower Court	60	Nursing Home	Inside
Parkview Rehabilitation Center at Winter Park	2075 Loch Lomond Drive	138	Nursing Home	Inside
Prevail Homes Residential Assisted Living Facility	1315 Devon Road	8	Assisted Living Facility	Inside
Regents Park of Winter Park	558 N. Semoran Blvd.	120	Nursing Home	Outside
Summer Time ALF, Inc.	909 N. Wymore Road	95	Assisted Living Facility	Outside
The Gardens at DePugh Nursing Home	550 W. Morse Blvd.	40	Nursing Home	Inside
The View at Winter Park	1047 Princess Gate Blvd.	6	Assisted Living Facility	Outside
Watercrest Winter Park Assisted Living and Memory Care	1501 Glendon Pkwy.	118	Assisted Living Facility	Inside
Westchester of Winter Park	558 N. Semoran Blvd.	121	Assisted Living Facility	Outside
Westminster Winter Park	1111 S. Lakemont Avenue	153	Assisted Living Facility/ Nursing Home	Inside
Winter Park Care and Rehabilitation	2970 Scarlet Road	103	Nursing Home	Outside

Source: [quality.healthfinder.fl.gov/facilitylocator/ListFacilities.aspx](http://quality.healthfinder.fl.gov/facilitylocator/ListFacilities.aspx), August 2023.

### **Dormitory & Campus Housing**

Rollins College is located in the heart of Winter Park on the south side of downtown and along the shore of Lake Virginia. In 2021, the college had a full-time undergraduate student enrollment of 2,145. The college manages dormitories and other student housing capable of accommodating 1,439 students (depending on bed configuration). Students who do not use on-campus housing find residential accommodations in apartments or homes within or near Winter Park. Students living in on-campus dormitories are not counted as permanent residents in the City's year-round population estimates and projections.

### **Inventory of Existing Mobile Homes**

Based on the 2021 American Community Survey 5-Year Summary File, the City of Winter Park currently has 10 manufactured or mobile homes. The principal reasons for the scarcity of this housing type are land costs within the City, local demand for traditional housing types, and affordable housing programs that allow very low and low-income households to obtain traditional housing types through homeownership or rent.

### **Historically Significant Housing**

The historical housing resources of Winter Park contribute to the aesthetic appeal and the solid economic base of the City. Much of the housing development activity over the last decade has involved the demolition and redevelopment of existing houses, many of which were built fifty or more years ago. Given the high cost of new construction, the replacement of older dwellings has resulted in the loss of viable, more affordable housing stock as well as the loss of historic resources. Concerns have been expressed within the community that the design and architectural style of new residential buildings do not retain and support the established neighborhood character unique to Winter Park.

In 2000, a study was conducted by the City to evaluate potential structures and sites for the Florida Master Site File and the Comprehensive Plan. Based on the findings and recommendations of this study, the City adopted a historic preservation ordinance in 2001, which was updated in 2015. The Future Land Use Element of the Comprehensive Plan contains a full listing of the historic resources within Winter Park, including historic housing. The vast majority of historic resources in the City are single-family residential units.

### **Inventory of Residential Construction Activity**

The 2020 US Census reports that the City of Winter Park had 13,986 housing units that year, a gain of 360 units above the 13,626 units reported in the 2010 US Census. Based on the U.S. Census Bureau, 2017-2021 American Community Survey 5-Year Summary File, the City had an estimated 9,623 single-family homes and 4,353 multiple-family units. The City of Winter Park saw a slight increase in housing units from 2010 to 2020 (Table 3-14), experiencing a 3% increase over the 10-year period. A similar rate of housing unit growth took place in Altamonte Springs over the same period, with a 4% increase. However, larger growth occurred in the neighboring cities of Maitland and Orlando, with a 15% and a 17% increase, respectively. Maitland and Orlando's growth rate are similar to the growth rate of housing units in Orange County (14%), which was almost five times the rate of growth in Winter Park.

**Table 3-14: Total Housing Units, 2010-2020**

PLACE	2010	2020	% CHANGE
Winter Park	13,626	13,986	3%
Maitland	8,137	9,341	15%
Altamonte Springs	22,088	22,919	4%
Orlando	121,254	142,115	17%
Orange County	487,839	554,517	14%

Source: U.S. Census Bureau, American Community Survey 2017 – 2021.

As can be seen in Table 3-15, single-family housing is the dominant form of housing in the city, representing 63% of the total housing stock in 2020; small multifamily housing (3-19 units) represented 14%. The remaining inventory consists of single-family attached, mobile homes, and other miscellaneous types of housing.

From 2010 to 2020, approximately 360 units were added to the housing inventory, an increase of 3%. While single-family attached units accounted for some of the growth (292 units), there was also a significant increase in the number of multi-family with 20 or more units, with approximately 466 units added to the inventory. Multi-family from 3 to 19 units experienced a slight increase of 86 units. As Table 3-15 notes, single-family attached units and specifically duplexes experienced a significant decrease.

**Table 3-15: Housing Units by Type, 2020**

TYPE	2010		2020		CHANGE	
	UNITS	PERCENT	UNITS	PERCENT	UNIT CHANGE	% CHANGE
1 Unit Detached	8,502	63%	8,794	63%	292	3%
1 Unit Attached	941	7%	829	6%	-112	-12%
2 Units	231	2%	74	1%	-157	-68%
3 – 19 Units	1,938	15%	2,024	14%	86	4%
20 or More Units	1,789	13%	2,255	16%	466	26%
<b>TOTAL</b>	<b>13,626</b>	<b>100%</b>	<b>13,986</b>	<b>100%</b>	<b>360</b>	<b>3%</b>

Source: U.S. Census Bureau, American Community Survey 2017 – 2021.

A trend not apparent from the statistics appearing in these tables involves the replacement of existing older residential units with new structures. A number of the new homes were constructed on the same lot where an existing house was demolished. Housing and land economics have made the reconstruction of existing residential development costs feasible in some neighborhoods within Winter Park.

Housing and economic conditions that support this trend include:

- Age, condition, and value of existing residential structures;
- Demand to live in Winter Park, and
- High costs associated with bringing existing older structures into compliance with new building standards.

## Housing Analysis

The purpose of the housing analysis is to identify housing needs through the year 2033. Analysis and projections are based on growth and development anticipated to occur within the City's boundaries. Housing needs created by annexation are not considered. Such analysis is performed when the Comprehensive Plan is amended to address planning needs for the annexed land.

The City staff took a two-fold approach to estimate the population. Staff looked at the existing population in the future Annexation Reserve Areas (ARA) to determine the potential timing and population that could be added to the City. The second examination was of the building permit data for the past 15 years for new home construction. Staff determined from that data the estimate of new infill single-family homes and new infill multi-family development projected.

Future housing needs are determined by comparing existing housing inventories with housing demands generated by the estimated future population.

## Population & Housing Demand

Demand for housing has a direct correlation with population growth. As the population increases, the demand for additional housing increases. Only a limited amount of vacant land remains available for new residential development. The City currently has 247.86 vacant acres, the majority of which is zoned for residential use. Pursuant to State growth management laws, population and housing growth are re-evaluated when amendments to the Future Land Use Map address annexed lands.

## Recent Growth & Construction Trends

Over the past decade, trends in housing and population change have emerged that likely will affect population growth and housing construction during the planning period for the Winter Park Comprehensive Plan.

### a. Growth from Annexation

Housing and population growth have primarily occurred over the past twenty years through the annexation of unincorporated residential property and neighborhoods. However, no significant annexation of residential property has occurred within the past ten years. Between 2010 and 2020, 360 housing units were added to the City's housing stock, an increase of 3%. The housing stock previously increased 17% between 2000 and 2010. This decline in additional housing is in part due to the recension of the City's R-4 High Density Multi-family land use category coupled with a lack of residential areas annexed into the City within the last decade. While single-family detached units accounted for some of the growth, there was also a significant increase in the number of multi-family with 20 or more units, with approximately 466 units added to the inventory. However, single-family attached units and duplexes experienced a significant decrease. With limited acres available for new residential development, annexation is expected to serve as the primary contributor to population growth. Population estimates presented are based on development activities within the City's current jurisdictional boundaries. As unincorporated areas are annexed, the Comprehensive Plan will need to be amended to

evaluate impacts and planning needs arising from the expanded jurisdictional lines. This trend is expected to continue in the future. Housing and population growth will occur primarily from annexation. As stated in the previous paragraph, the Comprehensive Plan only evaluates growth and development within the City's jurisdictional boundaries.

**b. Reconstruction**

Most new residential construction, particularly single-family homes, has occurred on lots where an existing older home was demolished to make room for a new structure. While the quality of housing is improved through construction using current Florida building codes, demolition of older homes may decrease affordability and may also impact the number of contributing resources available as consideration to the historic or architectural significance to the community. The City has measures in place to consider these factors as demolitions occur.

**c. Household Size**

Based on information from the Shimberg Center for Affordable Housing, state and national population trends indicate that the average number of persons in a household will decline over the next twenty years. Contrary to the national trend, household size has remained level and slightly increased in Winter Park. The 2020 US Census reports an average household size of 2.25 persons for Winter Park. The 2010 US Census lists 2.17 persons per household. With a population growth rate that will be low compared to rates anticipated for Orange County and some of its suburban cities, Winter Park is not anticipated to experience a significant increase in population through the 2033 planning horizon. Despite the slight increase, several factors impact limit the continued growth of household size. The population of Winter Park continues to age in place, creating smaller household sizes. Multi-family housing units that have been developed are primarily one or two-bedroom units in size, again supporting a smaller household size. The methodology used to estimate the future population herein applies the current average for persons per household.

**Population Estimates**

As past trends demonstrate that population and housing growth have predominantly occurred through annexation, the use of traditional growth methodologies – such as exponential, straight-line, or cohort population projection methodology – will not generate a reliable population projection for future years. The City estimates the population in conjunction with residential development on vacant land. Population estimates were prepared for the Winter Park Comprehensive Plan using a land-yield methodology. As new residential development occurs on vacant lands, additional population will be added to the City. There is also the potential for new residential development will also occur through the redevelopment of existing commercial structures into mixed-use structures that include residential units. The land-yield population methodology evaluates the population anticipated from vacant land and from residential lands. Future population estimates for the City appear in Table 3-16.

The City currently has a citywide residential density of 2.5 units per acre as of 2023. As land becomes scarcer for new development, density will rise to maximize the value of the land. Staff

anticipates an overall higher density per acre based on current zoning and the value of both vacant and redeveloped land in the city. Based on the current zoning assigned to the property, the Winter Park Planning and Zoning Department estimates that approximately 50% of the remaining 247.86 acres of vacant land may be used for residential development during this planning horizon.

<b>Table 3-16: Future Population Estimates</b>					
<b>YEAR</b>	<b>2010</b>	<b>2020</b>	<b>2023</b>	<b>2030</b>	<b>2033</b>
<b>TOTAL PERMANENT POPULATION</b>	27,852	29,795	29,816	30,453	30,726

Source: City of Winter Park, 2023

**Redevelopment & Affordable Housing**

Once vacant land is exhausted, greater development pressures will be placed on the redevelopment of existing older housing, particularly single-family housing. A positive attribute of this development pressure is increased interest in including residential development with commercial reconstruction. The commercial and housing markets may create more interest in placing residential apartments above retail and office uses.

Redevelopment pressures to accommodate future populations will also create pressure to rebuild at greater residential density, building height, and building mass. While increased densities may be appropriate within some areas of the City, desired residential and neighborhood character may be adversely affected if such encroachment occurs.

Based on data inventory and analysis presented in the Housing Element, the following housing and development trends are acknowledged:

**a. Protection of Established Neighborhoods & Promotion of Affordable Housing**

Demand for housing will continue to create pressure to remove older residential structures and replace them with newer homes. Based on the location and type of housing, the removal of older structures can have either a positive or negative effect on the availability of affordable housing.

The redevelopment of older multi-family units with higher-density development could create opportunities for more housing units. Where multi-family development is located near or adjacent to retail commercial or employment centers, more people can live within walking distance of jobs and shopping. Examples include both the Paseo and Village Park Senior Living. These projects reflect a live, work, and play lifestyle of multi-family development located adjacent to commercial development and city parks and resources. Replacement of older single-family homes with higher-value homes creates fewer housing opportunities for lower to middle-income households. Also, older homes have been replaced with larger structures that create less open space and are not in character with the surrounding housing. Existing residential neighborhoods may need protection from the encroachment of residential development activities that are not consistent with the desired neighborhood character. Such activity may also adversely affect available affordable housing.



**b. Availability of Affordable Housing**

The notion of what comprises affordable housing can, and will likely, change over a period of time as interest rates, underwriting criteria, and the larger market's overall level of activity also changes. In the present context, both the variables and assumptions that underlie the analysis are reasonable, especially given this community's built-out conditions. To the degree the larger region places a greater emphasis over the next decade on containing residential construction to existing areas, effectively intensifying them, that could alter the price value relationships in Winter Park as they have been described.

**c. Mixed-Use Development & Higher Residential Densities**

Future demand to live in Winter Park will place pressure on the private sector to develop at greater densities, including greater building height and building mass. This demand will conflict with the community character and built environment desired within some neighborhoods while creating opportunities to create more pedestrian-friendly development within other areas.

With scarce vacant land available for new residential development, housing could be provided in mixed-use development with residential, office, and commercial retail uses. Strategic areas within the City are likely appropriate for mixed-use development, particularly areas near major transportation corridors. Mixed-use development is likely inappropriate where encroachment of certain types of commercial retail uses into established residential areas will create land use incompatibilities.

**d. Substandard Housing**

While substandard housing conditions infrequently occur within Winter Park, the City should continue to monitor housing conditions and enforce building code requirements through its code enforcement program. The City should continue and perhaps augment coordination with Orange County to help direct housing assistance programs to eligible households and neighborhoods within Winter Park.

**e. Preservation of Historic Houses and Architecturally Significant Housing**

Land values, housing market conditions, housing trends, and construction costs to repair older houses have created a redevelopment trend. Older homes are demolished and replaced with new homes. There are a number of homes within Winter Park that have historic significance or have architectural design that establishes a residential vernacular creating a unique community character. The City has established a historical preservation ordinance that can protect structures identified as historic or of architectural significance if the owner agrees to designate their property.

**f. Integration with Transportation and Land Use**

The Transportation Element proposes a transportation system designed to create compatibility between land uses and the transportation system serving adjacent land uses. Residential development will need to be designed and oriented in a manner that enhances the integration of the transportation system with land uses. Residential densities and housing types will need to occur in a manner compatible with the designed transportation system.