

Introduction and Purpose

The Mission of the Florida Department of Transportation is to provide a safe transportation system that ensures the mobility of people and goods, enhances economic prosperity and preserves the quality of our environment and communities. The Trends and Conditions process assists Florida's transportation policy-makers and planning organizations by identifying, analyzing, and disseminating information about the key factors and emerging issues that affect Florida.

This *Pocket Guide to Florida Transportation Trends and Conditions* is organized into three areas:

- The growing demand for transportation facilities and services;
- The current system or supply of transportation; and
- The impacts of the transportation system on our society.

We hope you find this publication useful and helpful in understanding Florida's transportation system. More detailed trends and conditions information is available from our Web site at:

www.dot.state.fl.us/planning/policy/trends

Table of Contents

Introduction and Purpose	i
Table of Contents	ii

ii

Growing Travel Demand

Population.....	1
Travel Levels	3
Tourism and Travel.....	5
Freight and Commerce	7

2

The Transportation System

Strategic Intermodal System	9
Roadway System.....	11
Transit Systems	13
Transportation Disadvantaged Services	15
Pedestrian & Bicycle Services.....	16
Airports	17
Seaports	18
Rail System	19

10

Transportation Impacts

Travel Behavior of Floridians.....	21
System Performance	23
Transportation Safety.....	25
Transportation and the Environment.....	27
Transportation and the Economy	29

22

Other Resources	31
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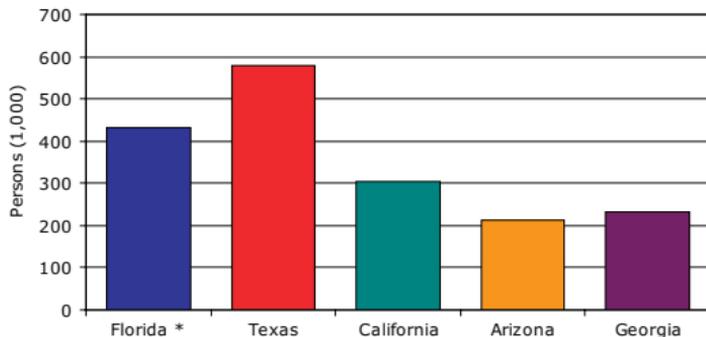
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Growing Travel Demand

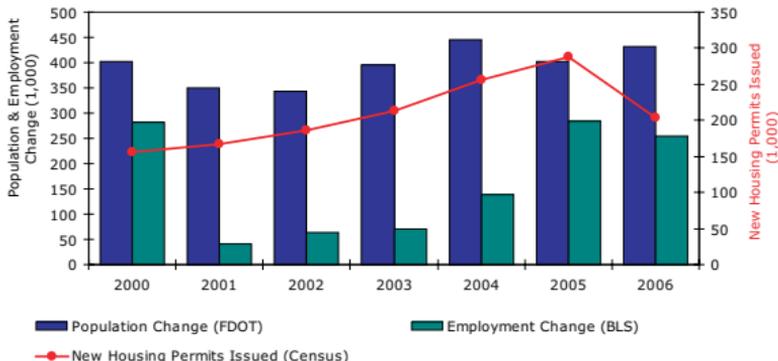
Population

2006 Population Increases for Fast Growing States



* All Florida population data from FDOT/BEBR unless otherwise noted

Trend in Population, Employment, and New Housing Permits Issued per Year



Growing Travel Demand

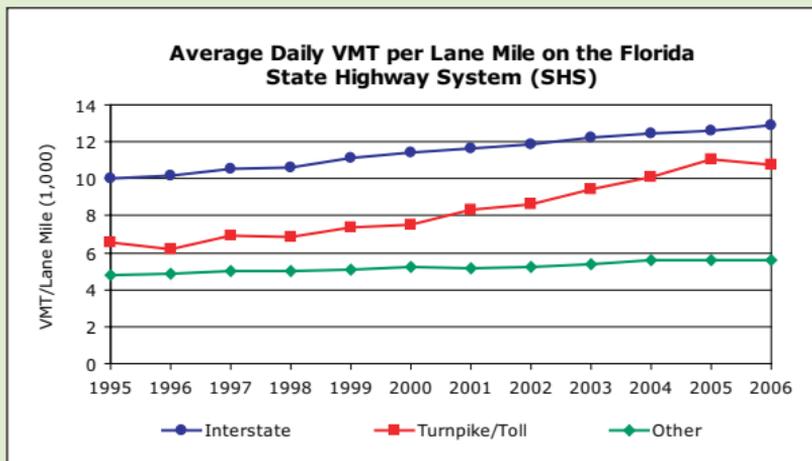
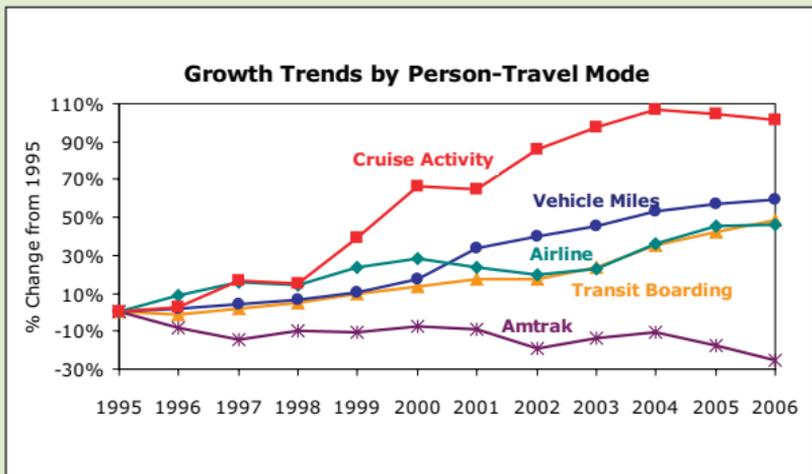
Population

- In 2006, Florida's population grew to 18,349,300. Florida had the second largest population increase among all states.
- From 2000 to 2006, Florida's population grew an average of 2.4% per year. The growth in 2005-2006 was 15% of the total US population growth. Florida's population is now 6% of the national total.
- From April 1, 2005 to April 1, 2006, it is estimated that Florida grew by nearly 1,200 persons per day.
- Based on Census projections, Florida is expected to have more people than New York in 2011 reaching 19,622,739 residents and becoming the third most populous state.
- In 2006, Florida issued 203,238 new housing permits, decreasing 29% from 2005 in response to overbuilding during 2001 to 2005.
- By 2030, 26% of Florida's population is projected to be older than 65, compared to 9.8% in 1970 and 17.6% in 2000.
- From 2000 to 2006, Flagler, the fastest growing county in Florida, added nearly 80% more residents. Sumter, Osceola, and Walton Counties grew by over 35%. Pinellas, Glades, Monroe, and Hardee had the slowest growth rates, below 3%.

Sources: U.S. Census Bureau. Florida Department of Transportation (FDOT). Bureau of Labor Statistics (BLS). Bureau of Economic and Business Research (BEBR), University of Florida.

Growing Travel Demand

Travel Levels



Growing Travel Demand

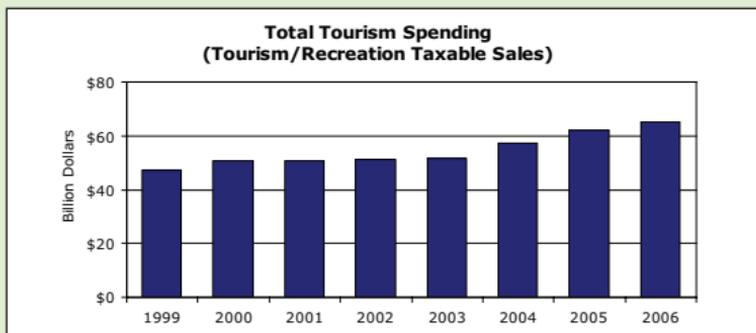
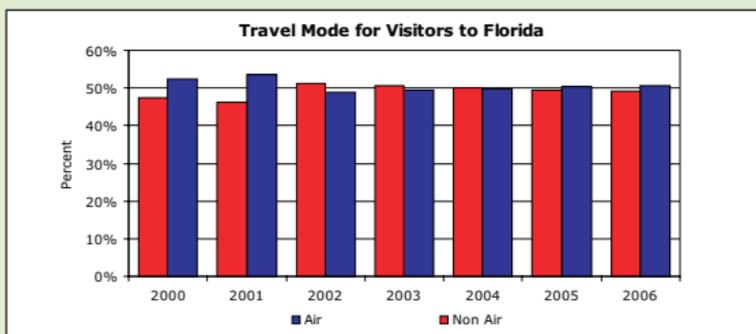
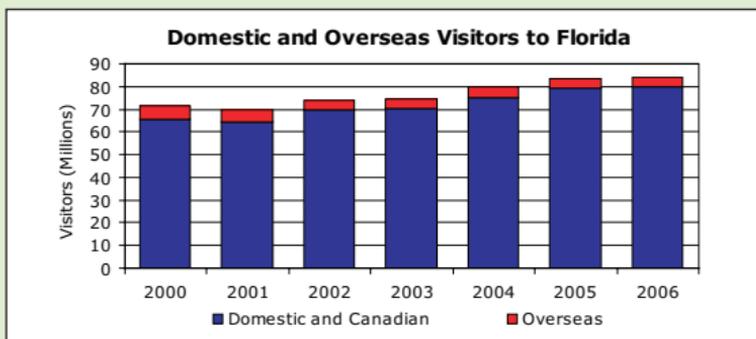
Travel Levels

- Vehicle Miles Traveled (VMT) in Florida grew by about 1.5% in 2006, slower growth than in recent years. This slowing trend was attributable to higher fuel prices, lower tourism levels, slower economic and population growth, and reduced housing activities and the associated freight travel.
- In 2005, Florida was second to North Carolina in VMT growth, well above the national average.
- Compared to 2005, transit boarding in 2006 increased by more than 10 million unlinked passenger trips (about 4%).
- Amtrak and cruise activity were down by 9% and 1%, respectively, in 2006. All other means of person travel showed growth trends.
- In 2006, Florida airports experienced about 69 million enplanements, an increase of nearly 1% from 2005.
- VMT per lane mile is an indicator of the intensity of highway usage. As travel demand growth has outpaced new roadway investment, travel per lane mile has increased.
- Vehicle registration and total licensure levels have continued to grow, partially as a result of population growth.

Source: FDOT Transportation Statistics Office (TSO), State Highway System Mileage Reports. FHWA, Highway Statistics Series. Florida Department of Highway Safety and Motor Vehicles (DHSMV). Amtrak. Florida Aviation Office. Florida Ports Council. Individual transit agencies.

Growing Travel Demand

Tourism and Travel



Growing Travel Demand

Tourism and Travel

- There were nearly 84 million visitor trips to Florida in 2006, about 0.4% more than in 2005.
- Domestic visitors to Florida outnumber international visitors by nearly 13 to 1.
- The number of international visitors to Florida has decreased by about 3% while the number of domestic visitors slightly increased by nearly 0.5% from 2005.
- There were approximately 4.6 visitors to the state for every resident in the state in 2006. Visitor growth rate has decreased from around 5% to nearly 0.4% in 2006.
- About 51% of all visitors to Florida arrive by air.
- Taxable spending in Tourism/Recreation reached about \$65 billion in 2006, up by approximately 5% from 2005.
- About 964,700 persons were directly employed by the tourism industry in 2006, which grew nearly 2% since 2005.
- There were over 14 million cruise passengers in fiscal year 2006. Port Canaveral had over 4.5 million passengers while Port of Miami and Port Everglades had over 3.7 and 3.2 million, respectively.

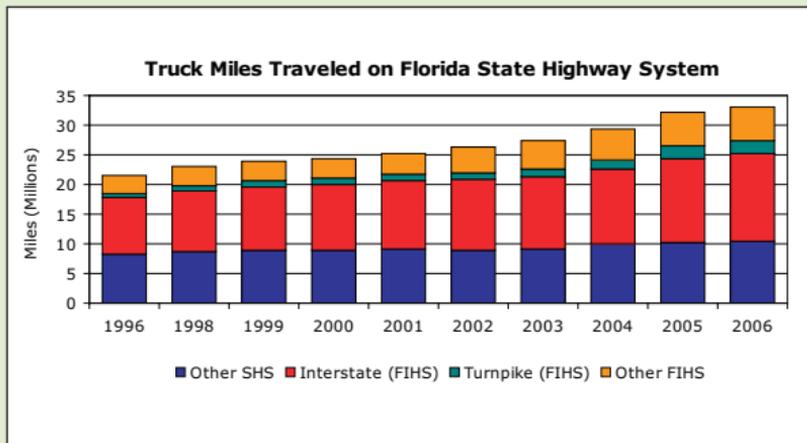
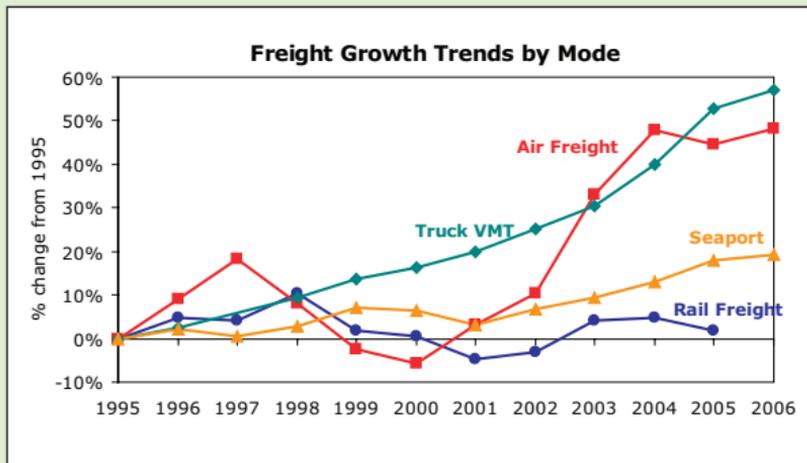
Source: Visit Florida, Annual Florida Visitor Study Series. 2006 visitor numbers are preliminary.

<http://media.visitflorida.org/about/research/>

Note: Cruise passenger data reported by respective Port Authority.

Growing Travel Demand

Freight and Commerce



Growing Travel Demand

Freight and Commerce

- The diversity of freight modes in Florida reflects both the variety of products generated and consumed in Florida and the availability of alternative modes for freight shipment.
- Non metallic mineral freight comprises more than 50% of total rail freight tonnage. Thus fluctuation in rail freight tonnage is mostly due to the performance of non metallic industries like phosphate.
- On the Florida Intrastate Highway System (FIHS), truck travel has increased faster than travel for other vehicles in the last few years.
- Truck Miles Traveled (TMT) increased about 3% in 2006. The percent increase was lower than in 2005.
- Higher value, time-sensitive, smaller size, or more perishable products rely predominantly on truck travel.
- Waterborne cargo in Florida reached a record \$73.5 billion in trade value in 2006 and accounted for more than two-thirds of the state's total international trade.

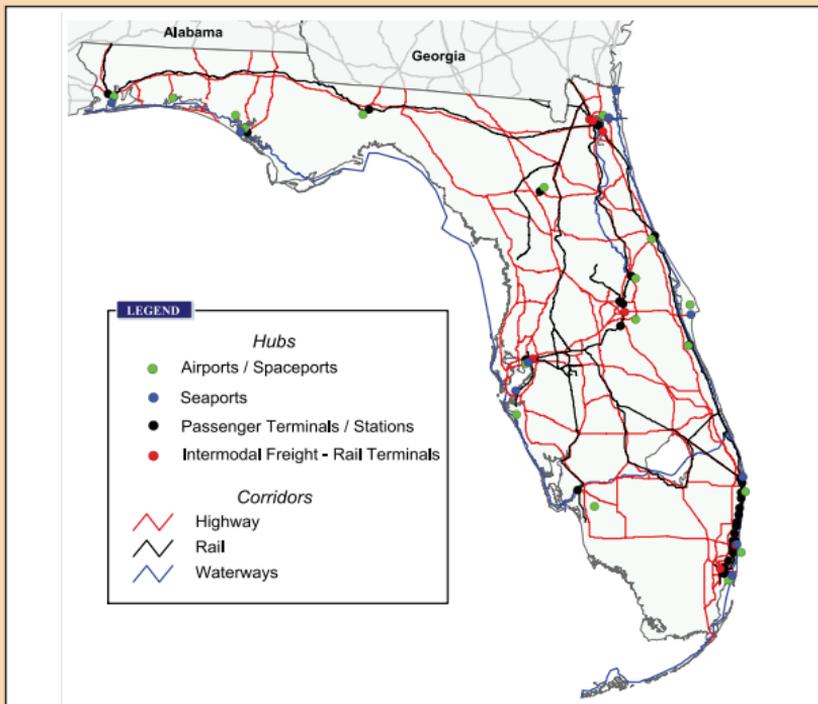


Sources: FDOT Transportation Statistics Office (TSO). FDOT Rail Office. Florida Ports Council. Florida Aviation Database. Association of American Railroads.

The Transportation System

Strategic Intermodal System

The Strategic Intermodal System (SIS) was established to enhance Florida's economic competitiveness by focusing limited state resources on those transportation facilities that are critical to Florida's economy and quality of life. It consists of facilities of statewide and interregional significance, including the state's largest and most significant commercial service airports, spaceport, deepwater seaports, freight rail terminals, passenger rail and intercity bus terminals, rail corridors, waterways and highways--the workhorses of Florida's transportation system.



The Transportation System

Strategic Intermodal System

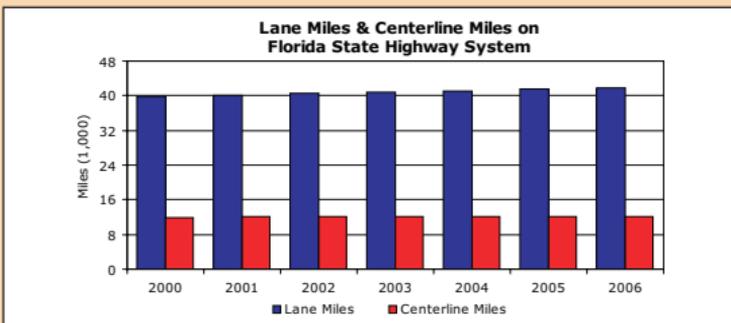
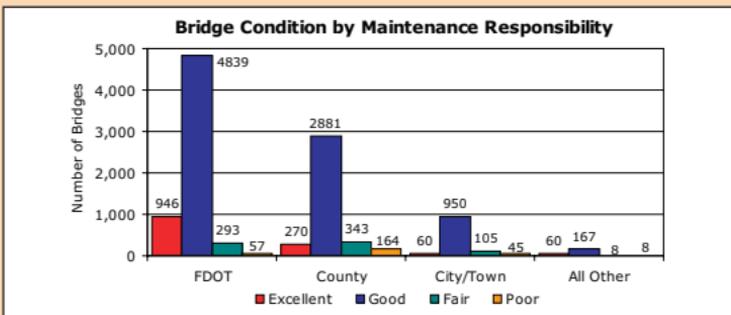
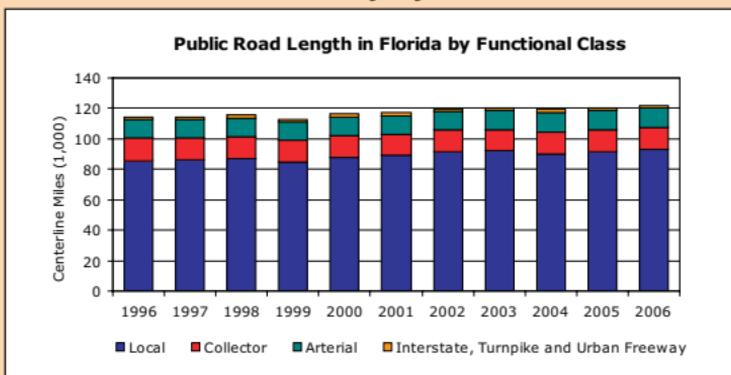
Facility Type	SIS	Emerging SIS
Commercial service airports	7	10
• Percent of all Florida enplanements	93%	6%
• Percent of all Florida air cargo tonnage	98%	1%
Spaceports	1	0
• Percent of all launch activity	100%	0%
Deepwater seaports	7	3
• Percent of all waterborne freight tonnage	98%	2%
• Percent of all home-port cruise passengers	>99%	<1%
Rail freight terminals	5	2
• Percent of all intermodal rail freight tonnage	85%	15%
Interregional passenger terminals	12	7
• Percent of all interregional passengers	70%	6%
Rail corridors	1,700 mi	400 mi
• Percent of all interregional rail passengers	100%	0%
• Percent of all freight rail tonnage	>90%	<10%
Waterways	1,100 mi	300 mi
• Percent of all waterborne freight on coastal and international shipping routes	100%	0%
• Percent of all waterborne freight on inland interregional waterways	0%	100%
Highways	3,534 mi	761 mi
• Percent of all traffic on SHS	52%	2%
• Percent of all truck traffic on SHS	67%	3%
Intermodal connectors	88 mi	93 mi
• Intermodal connectors (SHS Only)	52 mi	76 mi
• Intermodal connectors (Off-System)	36 mi	17 mi

Source: FDOT Office of Policy Planning (OPP), 2006. FDOT Systems Planning Office.

Note: Data are as of 10, 2007.

The Transportation System

Roadway System



The Transportation System

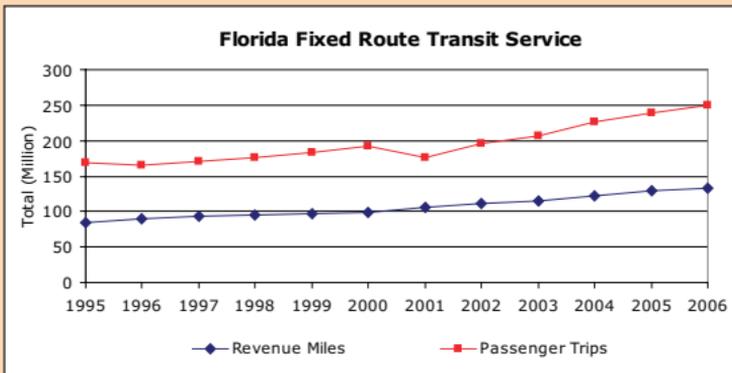
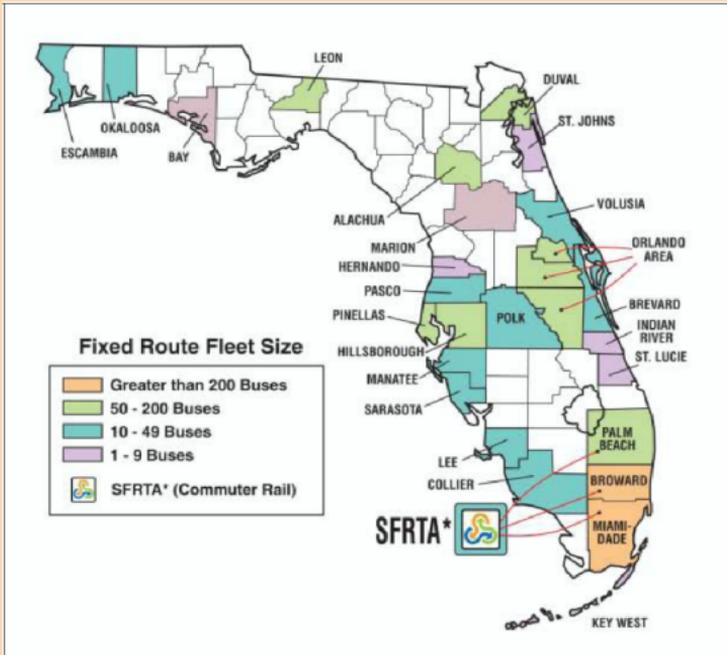
Roadway System

- Florida's roadway system has been growing steadily, but not nearly as fast as population or travel demand.
- Interstate, Turnpike & Freeways collectively gained around 1.4 percent centerline miles from 2005 to 2006.
- Lane Miles on Florida State Highway System increased by about 1 percent in 2006.
- The Florida State Highway System is approximately 10% of the entire Florida roadway network in 2006, but it carried about 54% of all daily traffic.
- Urban and rural roads functionally classified as "local" comprised 76% of the roadway centerline miles in 2006.
- Since 2000, total public road length in Florida has increased by 5,553 centerline miles or nearly 5 percent.
- The pace of new roadway capacity additions has been steady, governed by funding availability and the lead-time for securing right-of-way, engineering, and construction.
- Several factors impact the amount of new roadway system that can be afforded with existing resources:
 - rapidly growing right-of-way costs
 - growing costs of maintaining traffic during construction
 - recent cost increases for concrete, steel, and asphalt
 - costs of impact mitigation
- Of the 11,564 bridges in Florida, more than 56% are maintained by FDOT while the others are maintained by local governments and organizations.

Sources: FDOT TSO, 2006. FDOT Maintenance Office, Bridge Inventory Report 2007.

The Transportation System

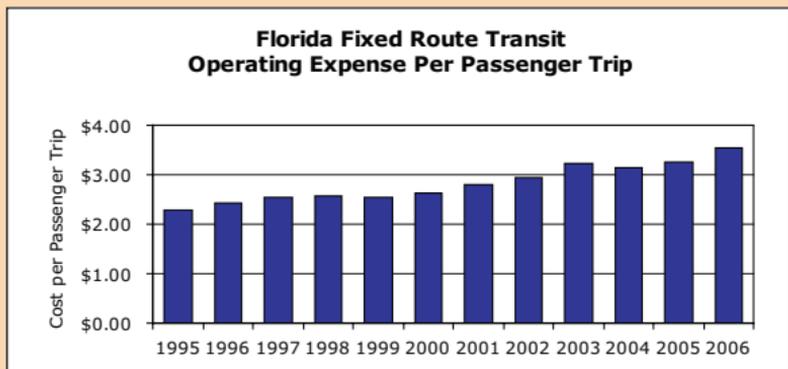
Transit Systems



The Transportation System

Transit Systems

- Passenger boardings approached 249 million on fixed route systems in 2006*, a growth of about 4% from 2005.
- Thirty-nine percent of Florida's population resides within walking distance of a transit route.
- Transit ridership and service levels have grown steadily over the past 15 years.
- In recent years, the growth of transit use has outpaced the growth of vehicle miles of travel, indicating that transit is playing an increasingly important role in meeting travelers' needs.
- Several Florida urban areas are planning for or exploring bus rapid transit or rail transit to meet current and future travel needs.

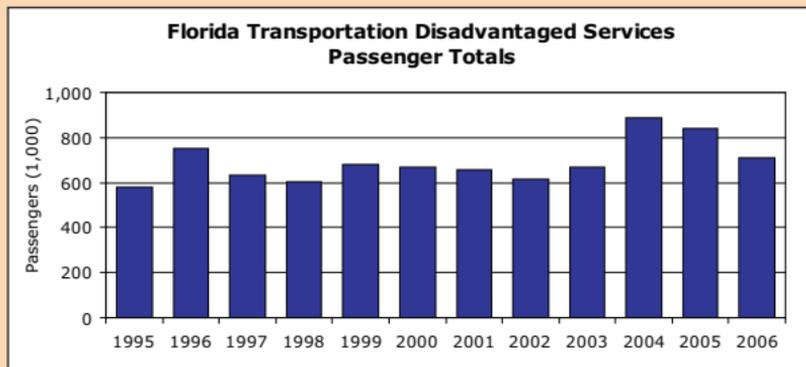


Source: Federal Transit Administration. National Transit Database. FDOT Transit Office.

*Note: 2006 NTD data were extracted from pre-release data files and may be amended.

The Transportation System

Transportation Disadvantaged Services



- Florida's Transportation Disadvantaged (TD) Program coordinated and provided nearly 53 million trips during 2006, a decrease of less than 1% from 2005.
- Over 35 million TD Program trips were provided on fixed route transit services.
- Of the trips provided by the TD Program, 36% were for medical purposes, 13% for employment purposes, 20% for education/training, 15% for nutrition, and 16% for other services.
- Florida's residents 60 or older account for 40% of TD trips, while children and other adults account for 17% and 43%, respectively.
- The number of unmet TD trip requests in 2006 increased by 11% from 2005 to over 800,000.

Source: Florida Commission for the Transportation Disadvantaged, 2006 Annual Performance Report.

The Transportation System

Pedestrian and Bicycle Services

- The ability of bicyclists to use transit extends the potential range of travel for this group and increases the service coverage area for transit riders. Bikes on bus usage has steadily grown in Florida.

Florida Monthly Bikes on Bus Boardings

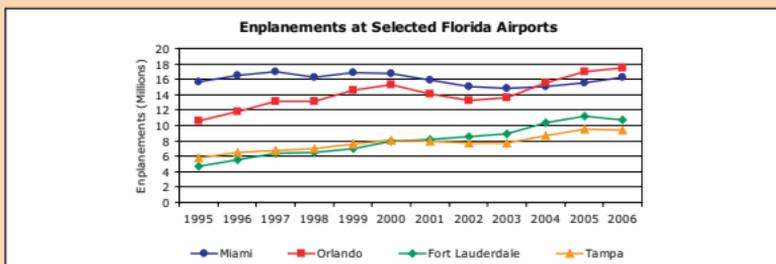
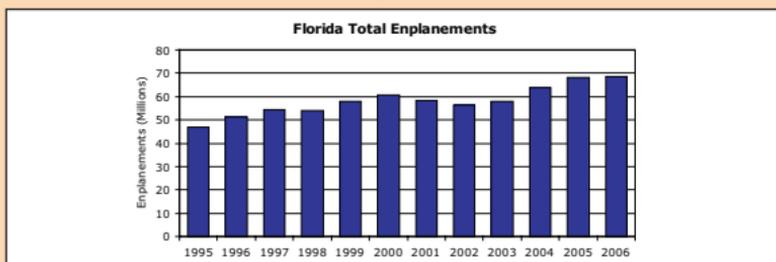
Agency	2002	2003	2004	2005	2006
BCT, Fort Lauderdale	NA	NA	30,000	31,300	31,696
PSTA, St. Petersburg	11,150	12,700	13,850	15,320	19,499
HARTline, Tampa	4,810	5,824	7,751	10,191	17,086
Space Coast, Brevard	NA	NA	4,000	4,000	5,480
Star Metro, Tallahassee	1,055	965	900	1,200	1,367

- HARTline had the highest increase in bikes on bus boardings with nearly 56% more users in 2006.
- Within urban areas, it is estimated that facilities for use as bikeways (roadway bicycle lanes or paved shoulders at least 4 feet wide) are present on over 50% of urban SHS centerline-miles that are not on limited access highways.
- By Florida law, bicycles are prohibited on limited access roadways unless a specific exception is authorized.
- On the entire non-limited access portion of the SHS, bikeway facilities are present on approximately two thirds of the roadways.
- The Florida Department of Transportation now routinely includes paved bicycle lanes and sidewalks in most urban construction projects.

Source: National Center for Transit Research, Analysis of Bikes on Bus Programs, 2006. FDOT Safety Office. Transit agency statistical data.

The Transportation System

Airports



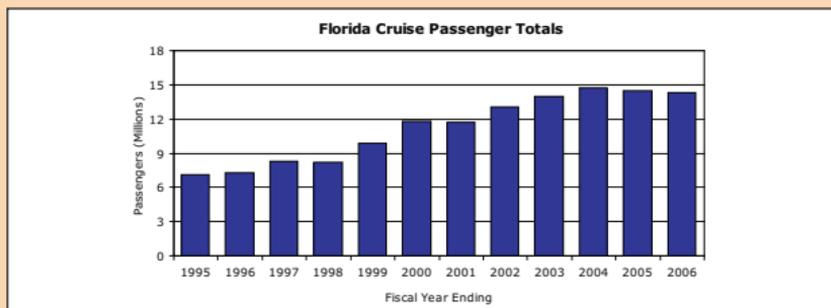
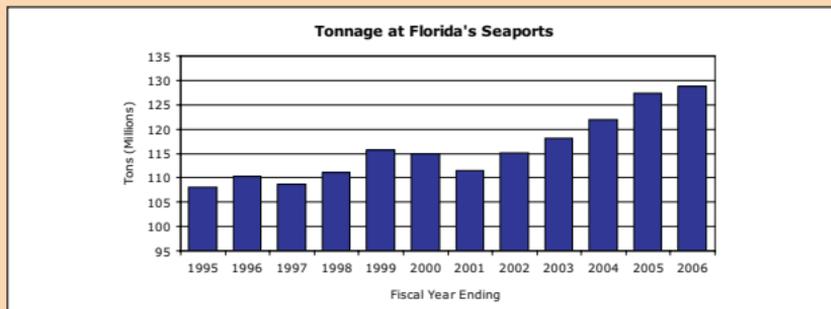
- Florida total enplanements grew by 0.6% from 2005, reaching over 68.6 million enplanements. Miami and Orlando International Airports experienced an increase in enplanements of 5% and 2.6%, respectively.
- Dramatic changes in the air travel industry, security concerns, industry restructuring and fuel prices have created near-term uncertainty regarding air travel; however, the core demand for air travel appears to remain strong.
- Florida's commercial airports have substantial capacity expansion plans for implementation as demand increases and expansion becomes financially viable.

Source: FDOT Aviation Office. Florida individual airport data.

The Transportation System

Seaports

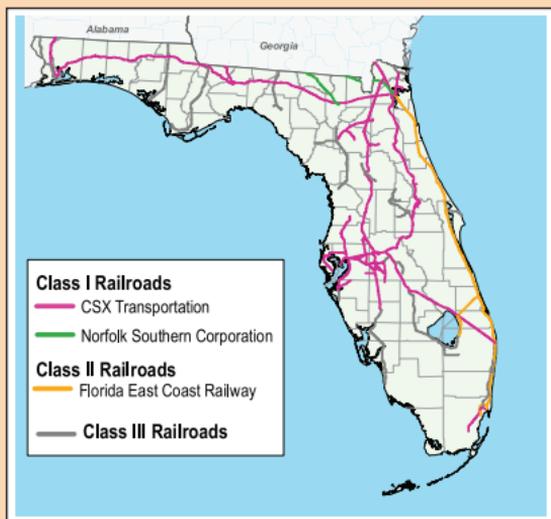
- Florida's 14 deepwater seaports provide freight access to various global trade hubs.
- Overall tonnage at Florida seaports has grown steadily since 2001. Container movements have been growing at Florida ports reaching almost 3 million TEU's (Twenty-foot equivalent units) in 2006.
- Florida remains a leader in the U.S. cruise industry, with seven Florida seaports hosting multi-day cruises.



Source: FDOT Seaport Office, 2007. Florida Ports Council, A Five-Year Plan to Achieve the Mission of Florida's Seaports: 2006/2007-2010/2011.

The Transportation System

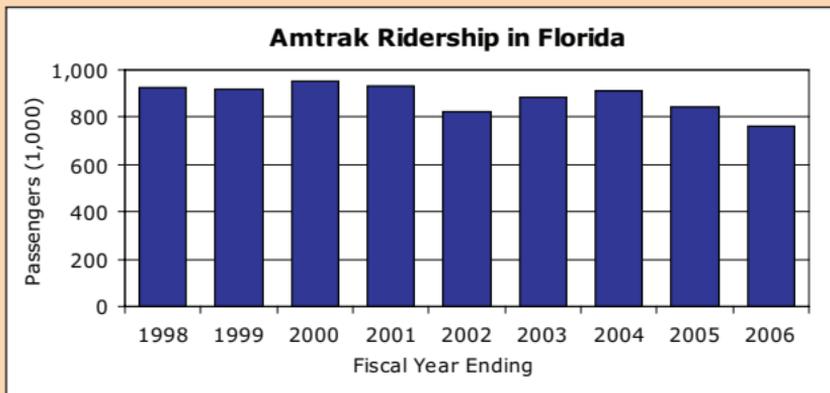
Rail System



- The rail system in Florida serves both passenger and freight transportation needs.
- The Florida rail system consists of 2,796 miles of routes owned by fifteen companies. CSX, which owns 54% of the track mileage, is the largest operator.
- In 2005, Florida's freight railroads moved more than 115 million tons of freight, down from 119 million in 2004. This includes totals of inbound, outbound, through, and local freight tonnage. Florida is unique among states in that local tonnage contributes nearly half of the total.
- Non-metallic minerals (63%), primarily phosphates, are the dominant rail product by weight followed by chemicals (13%) and food products (8%).

The Transportation System

Rail System



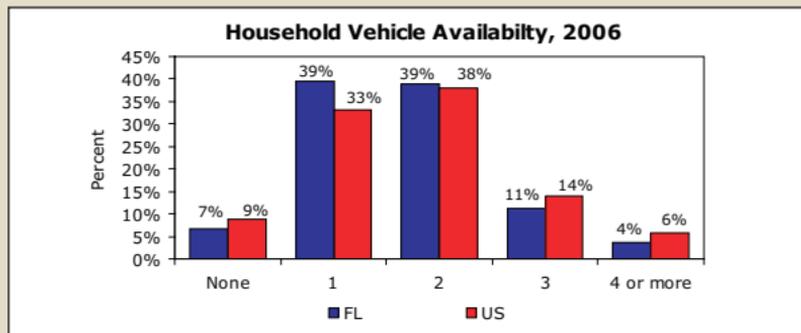
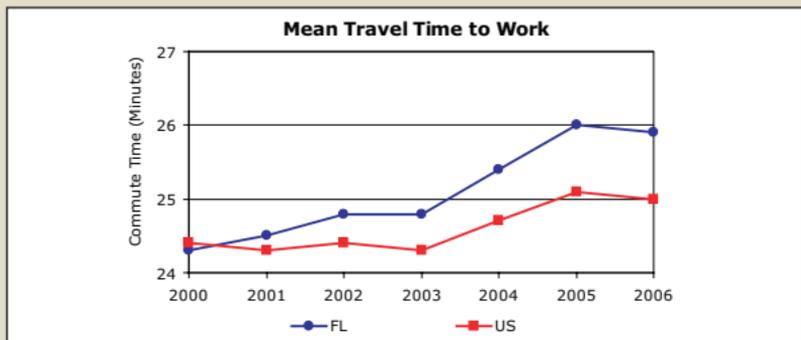
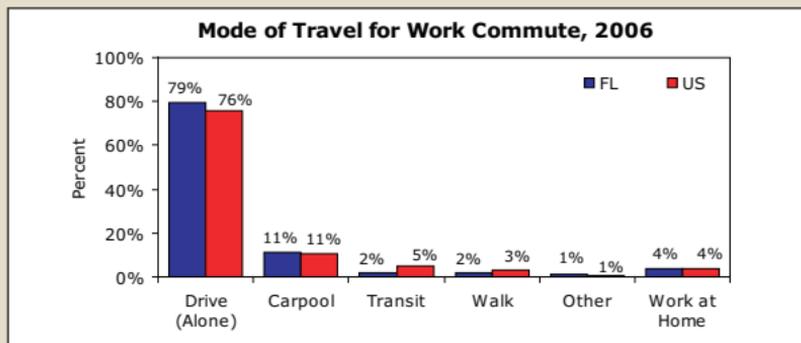
- While the vast majority of the intercity rail system is privately owned and operated, the Florida Department of Transportation does own the rail infrastructure on which Amtrak operates in Southeast Florida.
- Amtrak does not own any track in Florida.
- Amtrak operates just under 22,000 route miles nationally and almost 500 in Florida, down from 914 in 2005. The decline is due to the continuing suspension of the Sunset Limited route which has not traversed Florida since Hurricane Katrina.
- Amtrak carried 764,363 passengers in Florida in fiscal year 2006, a decrease of over 9% from 2005.
- Amtrak employed 943 Florida residents in 2006.

Source: FDOT Rail Office. Amtrak.

Note: Urban rail transit services are included in the transit pages of the Pocket Guide.

Transportation Impacts

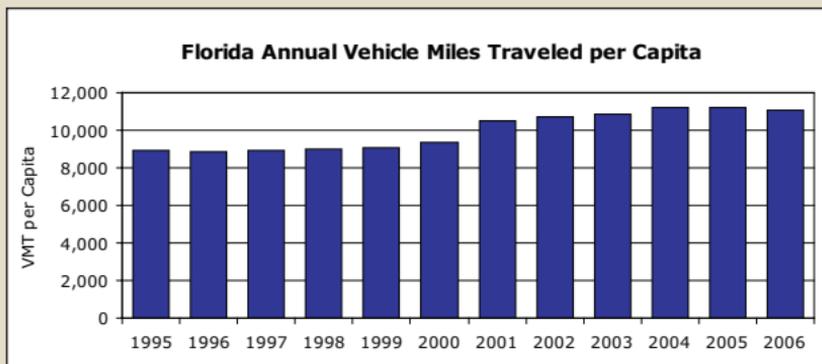
Travel Behavior of Floridians



Transportation Impacts

Travel Behavior of Floridians

- Nearly 90% of all commuting trips made by Floridians are by automobile – as drivers or passengers, slightly higher than the national average.
- In Florida, transit carries approximately 2% of commute trips, about half the average for the rest of the country. Increasing population and transit service expansion in urbanized areas are helping transit become more competitive in Florida.
- Walking is also a less common means of travel in Florida.
- Commute times decreased slightly for Florida as well as the nation.



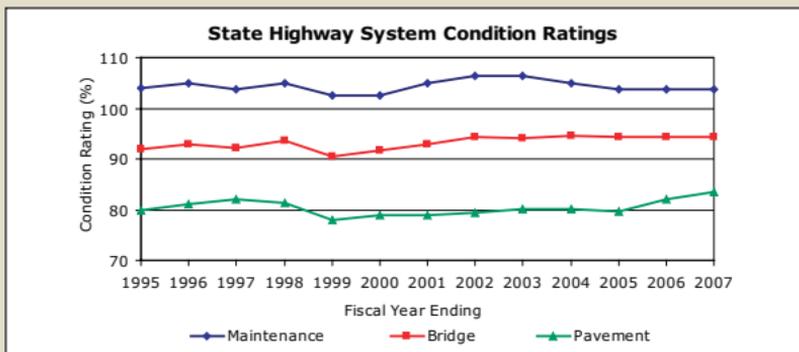
Source: U.S. Census Bureau, 2000-2006 American Community Survey.
Florida Department of Transportation.

Transportation Impacts

System Performance

System performance measures characterize the performance of the transportation system. Three measures are used to report performance.

- **Condition** describes the physical condition and maintenance requirements of system infrastructure.
- **Accessibility** is a measure of the ease with which people can connect to the multimodal transportation system.
- **Level of Service** is a measure of the quality of service provided by the transportation system to a typical traveler.



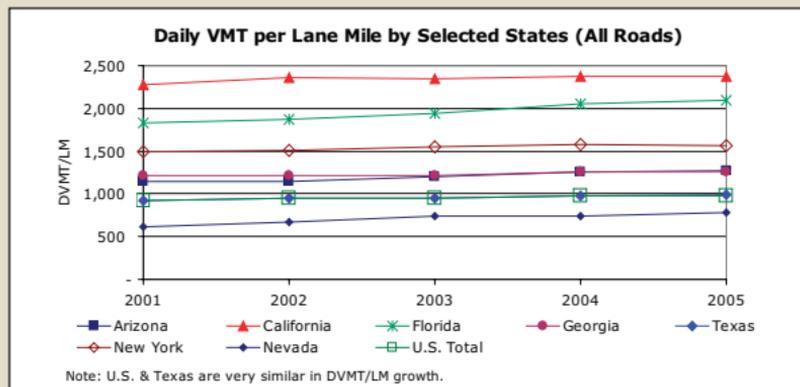
These measures are applied to all modes. However, the extent of public ownership and usage of the State Highway System results in more information being reported for highways.

The State is committed to keeping the State Highway System in acceptable condition. This includes meeting standards for maintenance, bridges and pavement conditions.

Transportation Impacts

System Performance

System Accessibility			
	Interstate Lane Miles per 100 Sq. Miles (2005)	Class I Rail Miles per 100 Sq. Miles (2006)	Airports per Million Residents (2006)
FL	13.6	3.3	1.3
U.S.	6.0	2.7	2.8
CA	9.5	3.5	1.2
GA	11.4	5.9	1.0
TX	5.7	4.7	1.3

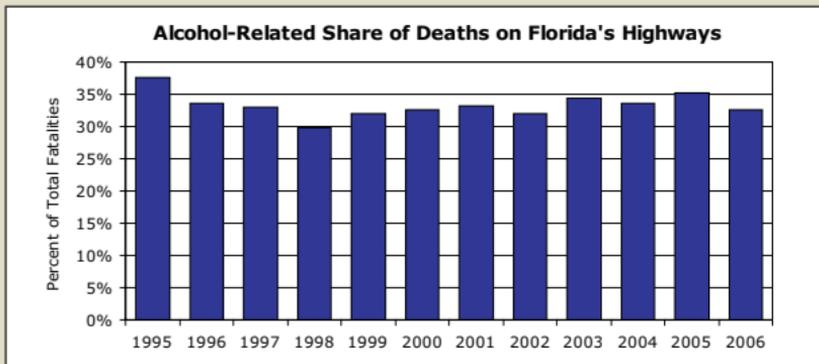
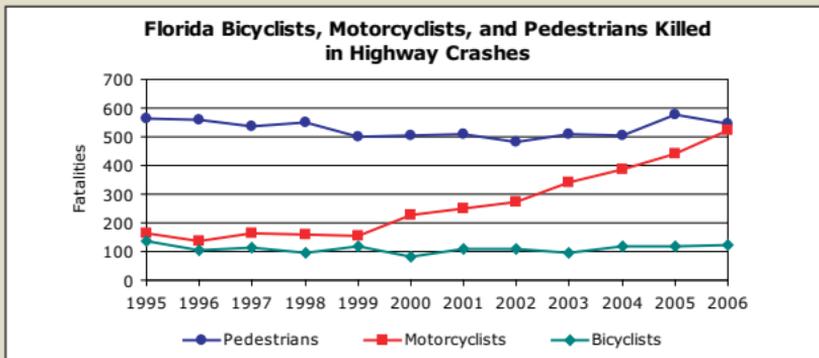
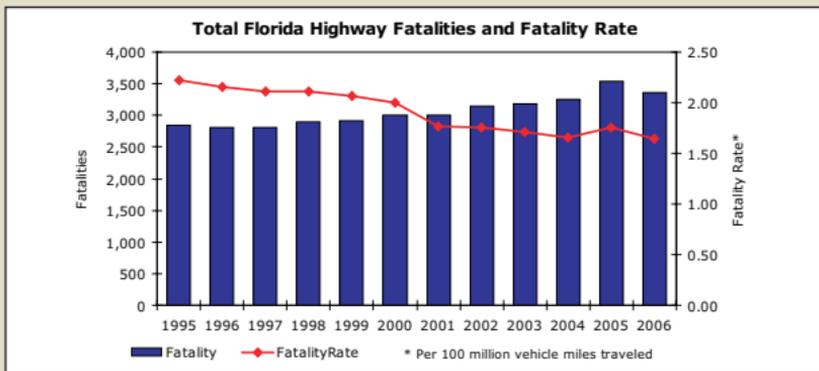


- Capacity expansion of the Florida Intrastate Highway System (FIHS) is not keeping up with travel demand based on 1995-2006 data. On the FIHS, from 2005 to 2006:
 - Lane miles increased about 1.6%.
 - VMT increased about 2.6%.
- In 2006, the FIHS experienced about 383,000 person hours of delay, an increase of about 3% from 2005.

Source: US Census Bureau. Bureau of Transportation Statistics, FHWA, Highway Statistics. FDOT OPP. FDOT TSO. American Association of Railroads.

Transportation Impacts

Transportation Safety



Transportation Impacts

Transportation Safety

- Safety trends are influenced by a host of factors including population growth, demographic characteristics, vehicle and roadway design, driving behavior, enforcement, and education.
- In 2006, the Department of Highway Safety and Motor Vehicles (DHSMV) reported that traffic crashes and fatalities decreased by almost 5% to 256,200 crashes and 3,365 fatalities.
- According to the National Highway Traffic Safety Administration (NHTSA), total traffic fatalities in the U.S. decreased by 2% to 42,642. Twenty-seven States including Florida and the District of Columbia had fewer fatalities in 2006 than in 2005.
- After the 2005 increase in the death rate per 100 million vehicle miles traveled in Florida, the rate had once again decreased to 1.65 in 2006.
- Of Florida's 3,365 traffic deaths in 2006, over 35% of them were of bicyclists, pedestrians, and motorcyclists.
- In 2006, about 33% of the traffic deaths in Florida were alcohol-related, down slightly from the previous year.
- Pedestrian fatalities decreased by over 5% from 2005, while those of motorcyclists grew over 18%.

Source: Florida DHSMV, Florida Traffic Crash Facts. National Highway Traffic Safety Administration (NHTSA), 2006.

Transportation Impacts

Transportation and the Environment

- More than \$10 million was spent on assessments, surveys, protection, conservation, and mitigation projects for Florida's threatened and endangered wildlife and plant species between 2003 and 2006. An additional \$25 million was spent in 2006 on wetland mitigation.
- Florida continues to be recognized as a national leader in wildlife/habitat protection and in implementation of wildlife crossings on state highways, particularly in south and central Florida. FDOT has built numerous wildlife crossings and continues to coordinate closely with federal and state environmental partners regarding wildlife protection in future transportation projects. At least 15 additional wildlife crossings are currently in the design phase or planned for construction within the next three years.
- Seventeen Florida corridors covering 650 miles have been designated as Florida Scenic Highways for the unique and significant intrinsic resources they possess: historic, recreational, archeological, scenic, cultural and natural. Ten additional corridors are expected to gain designation status as Florida Scenic Highways.



Transportation Impacts

Transportation and the Environment



- Florida's Highway Beautification Program is making a difference in conserving natural resources and creating scenic beauty. The investment helps restore natural systems, connect habitats, provide shade and comfort to pedestrians and bicyclists, screen unsightly views, and improve the experience of travel.



- FDOT's Sociocultural Effects Evaluation Process assesses the effects of proposed transportation projects on communities and their quality of life. The goal of the process is to avoid, minimize, or mitigate these effects where possible. Since October 2004, the public, local governments, resource agencies, and FDOT have evaluated 300 major transportation projects to determine their various effects on communities.

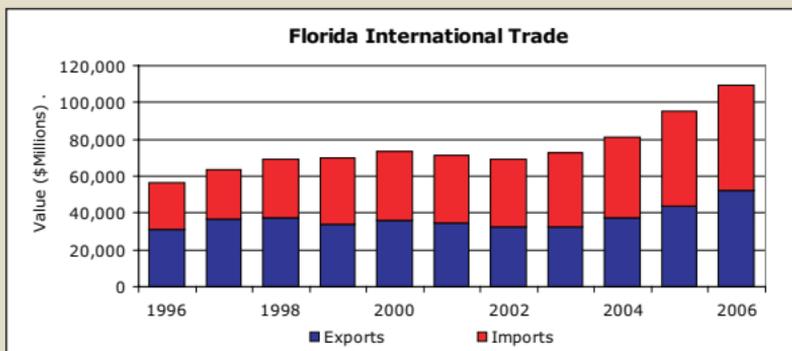


Source: FDOT Environmental Management Office.

Transportation Impacts

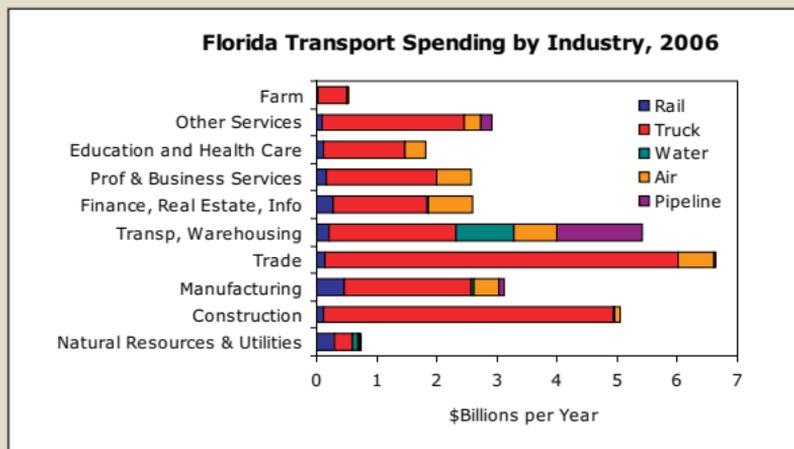
Transportation and the Economy

- Sustaining the performance of the transportation system enables a strong competitive economy and spending on transportation infrastructure is itself a significant contributor to the economy. Every \$1 invested in transportation in Florida results in a return of \$5.60, and every \$1 billion spent on highways creates over 38,000 jobs in direct construction and spin-off industries.
- The transportation and warehousing industry in Florida is responsible for over 219,000 jobs statewide and approximately \$8.7 billion in wages.
- In 2006, Florida's international trade (imports and exports) was valued at \$109.7 billion, an increase of 49 percent since 2000. Imports have grown most rapidly, reflecting the importance of Florida's seaports which handle more containers than any other South Atlantic or Gulf state.



Transportation Impacts

Transportation and the Economy



- Industry spending on transportation across all modes is estimated to be over \$31 billion per year. The retail/wholesale trade, transportation, and construction purchase the largest amount of transportation services with over \$5 billion.
- Florida has traditionally had a higher share of truck miles traveled (TMT) on its highways than the U.S. In 2006, TMT constituted over 10% of vehicle travel on the State Highway System (SHS).

Source: Bureau of Economic Analysis. Bureau of Transportation Statistics. Enterprise Florida. FDOT TSO.

Other Resources

Additional Resources

This **Pocket Guide** as well as other **Transportation Trends and Conditions** products are available at:

www.dot.state.fl.us/planning/trends.

Other Internet resources that provide useful information related to Florida's transportation trends and conditions include:

- **2025 Florida Transportation Plan**
<http://www.dot.state.fl.us/planning/ftp>
- **Florida Transportation Indicators**
<http://www.indicators.cutr.usf.edu>
- **FDOT Transportation Statistics Office**
<http://www.dot.state.fl.us/planning/statistics>
- **Florida Aviation Database**
<http://www.florida-aviation-database.com>
- **Florida Traffic Crash Facts**
[http://www.hsmv.state.fl.us/reports/crash facts.html](http://www.hsmv.state.fl.us/reports/crash%20facts.html)
- **Florida Ports Council**
<http://www.flaports.org/statistics.htm>

Other Resources

For further information, please contact:

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