a pocket guide to



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 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 four areas:

- The growing demand for transportation facilities and services;
- The current system or supply of transportation;
- The impacts of the transportation system on our society; and
- The resources, expenditures and costs associated with providing transportation.

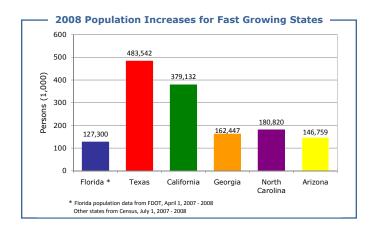
We hope you find this publication helpful in understanding Florida's transportation system. More detailed trends and conditions information is available at:

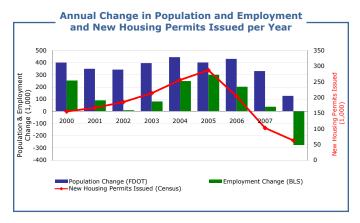
www.dot.state.fl.us/planning/trends

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Population



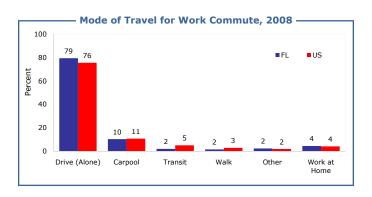


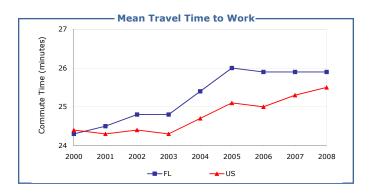


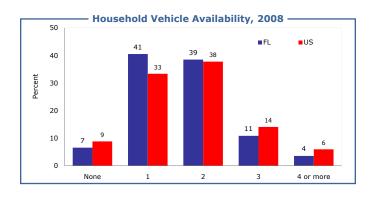
Population

- In 2008, Florida's population was over 18,807,000, an increase of 127,300 persons (0.7%) over 2007. Florida added an estimated 348 persons per day.
- In 2008, Florida's population grew slower than peer states and, for the first time in decades, than the national average of 0.9%.
- Between 2000 and 2008, Florida's population increased slightly over 2% per year, comprising nearly 13% of the total U.S. population growth. It is approximately 6% of the total national population.
- In 2008, Florida issued 61,042 new housing permits, 40% below 2007.
- By 2030, 26% of Florida's population is projected to be 65 and older, compared to 10% in 1970 and 17% in 2007.
- From 2000 to 2008, Flagler, the fastest growing county in Florida, added nearly 92% more residents. Other fast growing counties include: Sumter (over 74%), Osceola (nearly 59%), St. Johns (over 47%), St. Lucie (over 43%) and Walton (over 42%).
- From 2007 to 2008, Collier, Broward, Pinellas, Calhoun and Monroe lost residents. Monroe had the largest population loss (over 4%) from 2000 to 2008.

Travel Behavior of Floridians



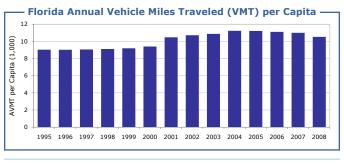




Travel Behavior of Floridians

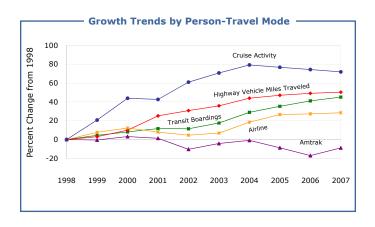
The 2008 American Community Survey found:

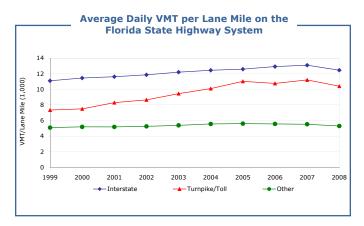
- Nearly 90% of Florida workers commuted to work by automobiles, higher than the national average.
- In Florida, transit carried approximately 2% of commuter trips, less than half the national average of 5%.
- Walking was a less common means of commuting in Florida (1.5%) than nationally (2.5%).
- Average commute time remained at 25.9 minutes for Florida, while the national average increased to 25.5 minutes.
- Over 29% of Florida households had no workers.
 The national share of households with no workers was below 25%.
- The share of households with no cars increased in Florida to an estimated 6.6%, below the national level of 8.8%. The share of population living in zero-vehicle households was 6.1% in the U.S. and 4.3% in Florida.



Source: U.S. Census Bureau, American Community Survey; FDOT Note: Annual VMT based on FDOT daily VMT times number of days per year.

Travel Levels







growing travel demand

Travel Levels

Vehicle Miles Traveled (VMT)
 in Florida decreased by nearly
 4% in 2008. This decrease
 was attributable to higher fuel
 prices, lower tourism levels,
 slower economic and population
 growth, and reduced freight
 travel



 Compared to 2007, fixed route transit boarding in 2008 increased by more than 6.5 million unlinked passenger trips (about 3%).



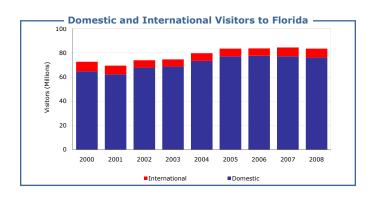
 Amtrak ridership was up 15% while cruise activity was down 6.4% in 2008.

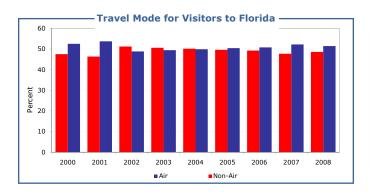


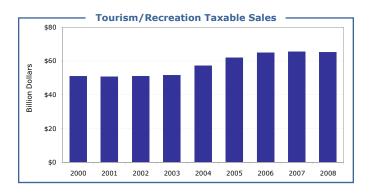
- In 2008, Florida airports
 experienced about 70 million enplanements, a
 decrease of 2.1% from 2007.
- VMT per lane mile is an indicator of the intensity of highway usage. While travel per lane mile increased through 2007, the slowdown in travel resulted in a slight VMT decline in 2008.
- In 2009, total licensed drivers decreased by 0.1%. Passenger car, truck and motorcycle registrations went down by nearly 0.5% compared to 2008.

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

Tourism and Travel







Tourism and Travel

- There were 84.2 million visitor trips to Florida in 2008, 0.4% less than in 2007.
- Domestic visitors to Florida outnumbered international visitors by approximately 10 to 1.
- The number of international visitors to Florida increased by 13.2% while the number of domestic visitors decreased by 1.6% from 2007.
- There were approximately 4.6 visitors to Florida for every resident in the state.
- About 52% of all visitors to Florida arrived by air.
- Taxable spending in tourism/recreation reached about \$65.2 billion in 2008, down by approximately 0.4% from 2007.
- About 1,007,000 persons were directly employed by the tourism industry in 2008, growth of nearly 1.6% since 2007.
- There were over 13 million cruise revenue passengers in fiscal year 2008.
 - The Port of Miami had over 4.1 million passengers.
 - Port Everglades had
 3.2 million passengers.
 - Port Canaveral had 3.6 million passengers.

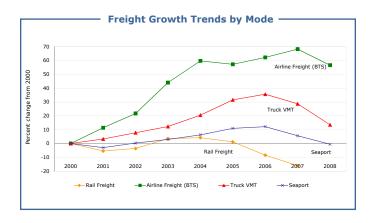


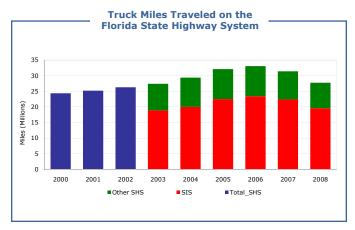
Source: Visit Florida, Florida Visitor Study.

http://media.visitflorida.org/about/research.php

Note: Cruise passenger data reported by respective port authority.

Freight and Commerce







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 comprised 55% of total rail freight tonnage in 2007. The fluctuation in rail freight tonnage over the years was mostly due to the changing market conditions for non metallic industries like phosphate.
- Truck Miles Traveled on the entire State Highway System decreased about 12% in 2008. On the Strategic Intermodal System (SIS), truck travel decreased by nearly 13% in 2008 compared to 2007.



- Truck travel amounted to 12% of vehicle miles of travel on the SIS in 2008, down from 13.2% in 2007.
- Waterborne cargo in Florida reached a record \$82.5 billion in trade value in 2008, an increase of 12.5% over 2007.
- The slowing economy and the significant slowdown in residential and other construction activities have contributed to declines in most freight movement in Florida.

Source: FDOT Transportation Statistics Office; FDOT Rail Office; Florida Ports Council; Bureau of Transportation Statistics; Association of American Railroads

Strategic Intermodal System

The following table summarizes the current quantity of facilities on the SIS, as well as the estimated percentage of trips using SIS facilities.

Strategic Intermodal System Facilities					
Facility Type	SIS	Emerging SIS			
Commercial service airports Percent of all Florida enplanements Percent of all Florida air cargo tonnage	7 93% 98%	10 6% 1%			
General aviation reliever airports	1	0			
Spaceports Percent of all launch activity	1 100%	0 0%			
Deepwater seaports Percent of all waterborne freight tonnage Percent of all home-port cruise passengers	7 97% >99%	3 2% <1%			
Rail freight terminals Percent of all intermodal rail freight tonnage	5 85%	2 15%			
Interregional passenger terminals Percent of all interregional passengers	26 82%	9 7%			
Rail corridors Percent of all interregional rail passengers Percent of all freight rail tonnage	1,700 mi 100% >90%	400 mi 0% <10%			
Waterways Percent of all waterborne freight on coastal and international shipping routes Percent of all waterborne freight on inland interregional waterways	1,900 mi 100% 55%	312 mi 0% 11%			
Highways Percent of all traffic on SHS Percent of all truck traffic on SHS	3,532 mi 52% 67%	761 mi 2% 3%			
Intermodal Connectors Highway (centerline miles) Rail (mainline miles) Seaport (miles)	592 mi 212 mi 232 mi 148 mi				

Source: FDOT Systems Planning Office; FDOT modal offices

Strategic Intermodal System

Florida's Strategic Intermodal System (SIS):

- Is made up of statewide and regionally significant facilities and services (strategic);
- Contains all forms of transportation for moving both people and goods, including linkages that provide for smooth and efficient transfers between modes and major facilities (intermodal); and
- Integrates individual facilities, services, forms of transportation (modes) and linkages into a single, integrated transportation network (system).

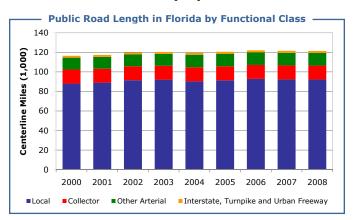
The SIS was established to:

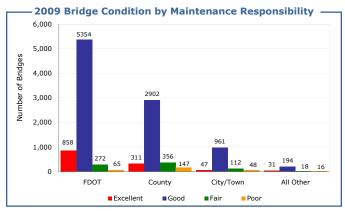
- Efficiently serve the mobility needs of Florida's citizens, businesses, and visitors; and
- Help Florida become a worldwide economic leader, enhance economic prosperity and competitiveness, enrich quality of life, and reflect responsible environmental stewardship.

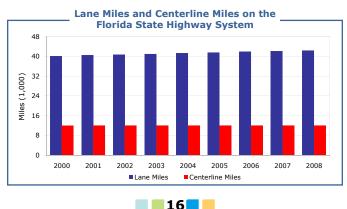


Source: FDOT Office of Policy Planning, 2008

Roadway System





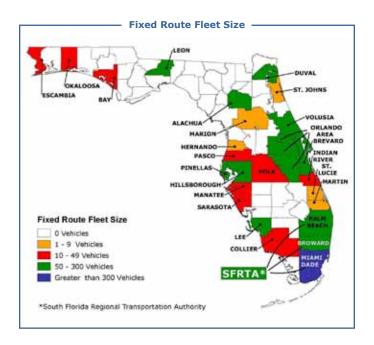


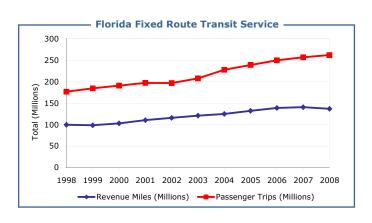
Roadway System

- The centerline miles of public roads remained about the same in 2007 and 2008. Lane miles on the Florida State Highway System (SHS) grew less than 1% in 2008.
- Urban and rural roads functionally classified as "local" comprised 76% of the roadway centerline miles in 2008.
- The SHS was approximately 10% of the entire Florida roadway network in 2008, but it carried about 54% of all daily traffic.
- Since 2000, total public road length in Florida has increased by nearly 5,000 centerline miles or more than 4%.
- As Florida's roadway infrastructure grows and ages, additional resources are required to maintain the existing system leaving less for expansion.
- Declines in VMT and new vehicle registration fees resulted in lower revenues from user fees in 2008.
- Of the 11,692 bridges in Florida, more than 56% are maintained by FDOT while the others are maintained by local governments and organizations.
- About 95% (6,212) of the state-maintained bridges are in excellent or good condition.

Sources: FDOT Transportation Statistics Office, 2008; FDOT Maintenance Office, Bridge Inventory Report, 2008

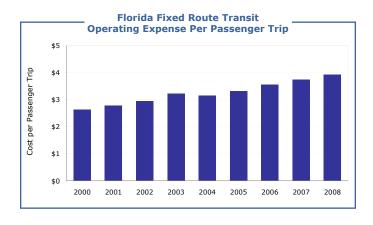
Transit Systems





Transit Systems

- Passenger boardings were approximately 262 million on fixed route systems in 2008, a growth of about 2% from 2007.
- Transit ridership growth outpaced roadway travel in 2008, indicating a higher transit mode share (transit ridership up 2%, VMT down 4%).
- Seventy-six percent of Florida's population resides within three-quarters of a mile of a transit route.
- Several Florida urban areas are planning for or exploring bus rapid transit or rail transit to meet current and future travel needs.



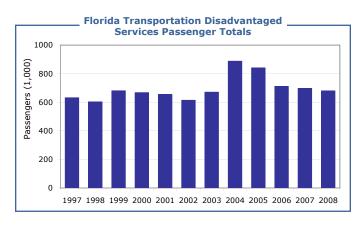
Source: Federal Transit Administration, National Transit Database;

FDOT Transit Office

Note: Fixed route transit service includes vanpools affiliated with a public program. Vanpools reported over 1.1 million trips in 2008. Map includes 2007 data for Marion county.

Transportation Disadvantaged Services

- Florida's Transportation Disadvantaged (TD)
 Program coordinated and provided nearly 50.3
 million trips during 2008, a decrease of 2.04%
 from 2007.
- Nearly 32.4 million TD Program trips were provided on fixed route transit services.
- Of the trips provided by the TD Program, 32% were for medical purposes, 17% for employment purposes, 21% for education/ training, 14% for nutrition, and 16% for other services.
- Florida's residents 60 or older account for 37% of TD trips, while children and younger adults account for 16% and 47%, respectively.
- The number of unmet TD trip requests in 2008 was 1,009,436; an increase of 29.11% from 2007.



Source: Florida Commission for the Transportation Disadvantaged, 2008 Annual Performance Report

Pedestrian and Bicycle Services

 The Florida Department of Transportation typically includes bicycle lanes and sidewalks in urban-area construction projects.
 Many local governments have adopted similar practices.



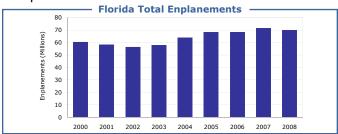
- Designated Bike Lanes means stripeseparated portions of the roadway with pavement markings and/or signs indicating the preferential use of bicycles. Statewide, Designated Bike Lanes exist along 708 miles of the State Highway System (SHS).
- Of over 4,794 miles of SHS urban non-limited access roads, over 626 miles (13%) have Designated Bike Lanes on at least one side of the road and over 2,238 miles (47%) have sidewalks.
- Bikes-on-bus usage has steadily grown in Florida. The StarMetro system in Tallahassee had the highest increase in bikes-on-bus boardings with approximately 46% more users in 2008.

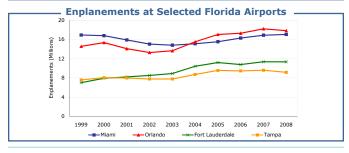
Florida Monthly Bikes on Bus Boardings								
Agency	2003	2004	2005	2006	2007	2008		
BCT, Fort Lauderdale	NA	30,000	31,300	31,696	32,584	30,560		
PSTA, St. Petersburg	12,700	13,850	15,320	19,499	28,461	33,007		
HART, Tampa	5,824	7,751	10,191	17,086	20,730	20,663		
Space Coast, Brevard	NA	4,000	4,000	5,480	6,967	8,081		
Star Metro, Tallahassee	965	900	1,200	1,367	1,524	2,227		

Source: National Center for Transit Research, *Analysis of Bikes on Bus Programs, 2007*; FDOT Safety Office; individual transit agencies

Airports

- Dramatic changes in the air travel industry, security concerns, industry restructuring, fuel prices, and the economy have created nearterm uncertainty regarding air travel. However, the core demand trend for air travel appears to remain strong.
- Commercial airport expansion has slowed but is expected to grow as forecasted demand increases and expansion becomes financially viable.
- Florida's total enplanements decreased by 2.1% from 2007, reaching over 70 million in 2008.
 Those at Tampa and Orlando International Airports decreased 4.6% and 2.1%, respectively, while Miami International Airport experienced an increase of 1%.

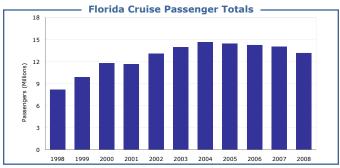


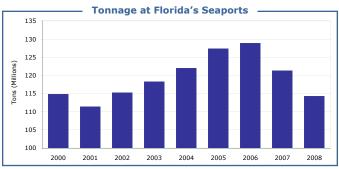


Source: FDOT Aviation Office; Florida individual airports; Federal Aviation Administration

Seaports

- Florida's 14 deepwater seaports moved 114.2 million tons of cargo and handled 2.9 million TEU's (20 ft. equivalent container units) in 2008.
- Florida's total waterborne tonnage declined by almost 6% in 2008. There was a modest increase in cargo value. The container movements and cruise passenger volumes decreased by 1.8% and 5.7%, respectively, compared to fiscal year 2007.
- Florida remains a leader in the U.S. cruise industry. Six of Florida's 14 seaports carried 13.2 million cruise passengers of which 11.1 million sailed on multi-day cruises in 2008.





Source: FDOT Seaport Office, 2008; Florida Ports Council, A Five-Year Plan to Achieve the Mission of Florida's Seaports: 2007/2008-2011/2012

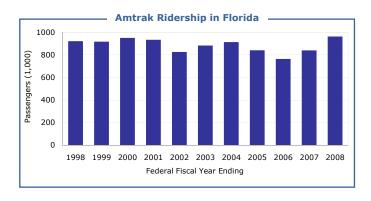
Rail System

- Of the 2,796 miles of rail lines in Florida, all but 81 miles are owned by 15 freight railroads and the entire track is controlled by them.
- As of January 2009, there were 3,947 public rail crossings in Florida, which presented both safety and mobility challenges.
- In 2007, Florida's freight railroads moved more than 100 million tons of freight.
- Industries which depend heavily on a strong freight rail system are phosphates and fertilizers, coal, distribution and retail, food and agriculture, paper and fiber, automotive distribution, energy, and construction.



Rail System

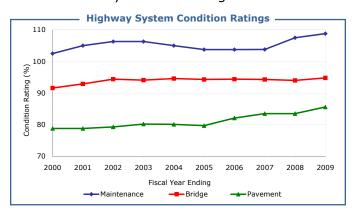
- The Florida Department of Transportation owns the rail infrastructure on which Amtrak operates in Southeast Florida.
- Amtrak currently provides three daily trains to Florida: the Silver Meteor and Silver Star from New York and the Auto-Train directly from Lorton, Virginia to Sanford, Florida.
- Florida is actively considering intercity rail, urban rail transit and high speed intercity rail expansion proposals.
- Amtrak expended \$8.89 million for goods and services in Florida in fiscal year 2008 (FY08), a decrease of 75% since FY07. It carried 963,092 passengers in Florida in FY08, an increase of around 15% from FY07.
- Amtrak employed 728 Florida residents in 2008 and operated service on almost 500 route miles in Florida.



Source: FDOT Rail Office; Amtrak; Association of American Railroads
Note: Urban rail transit services are included in the transit pages of
the Pocket Guide.

System Performance

The state is committed to keeping the State Highway System (SHS) in acceptable condition. This includes meeting standards for maintenance, bridges and pavement condition. Condition ratings on the SHS continue to exceed the standards set by the Florida Legislature.

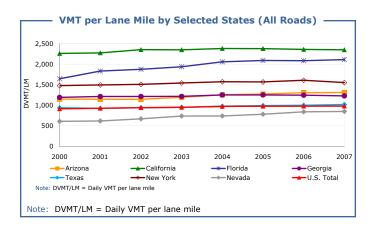


Florida Department of Transportation Contracting Activity, State Highway System Including Turnpike							
	2003- 2004	2004- 2005	2005- 2006	2006- 2007	2007- 2008		
Lane Miles for Resurfacing (including Turnpike)	2,075	3,933	3,518	3,711	2,186		
Lane Miles for Highway Capacity Improvements (including Turnpike)	377	288	229	344	241		
Bridges to Be Repaired (including Turnpike)	84	91	81	132	75		
Bridges to Be Replaced (including Turnpike)	17	13	16	7	12		

Source: FDOT Office of Financial Development, 2009

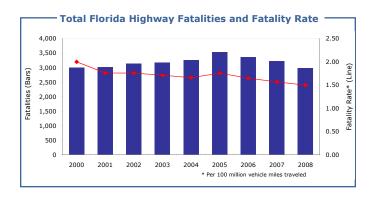
System Performance

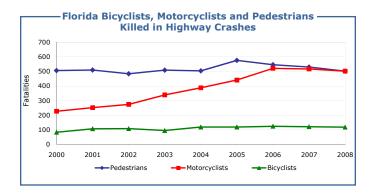
- Demand on the State Highway System (SHS)
 has grown faster than capacity expansion.
 From 2000 to 2008, VMT increased 13.7%
 while lane miles grew 6%. A change in the
 trend occurred in 2008 when VMT decreased by
 3.7% and lane miles expanded by 0.8% from
 2007.
- In fiscal year 2009, FDOT contracted for 229 lane miles of capacity improvements: 2,894 lane miles of SHS resurfacing, and 115 bridge repairs and replacements.
- Generally, Florida roads are more heavily traveled than those of other states, ranking sixth highest in the nation.

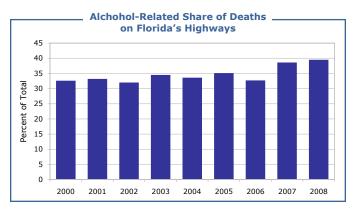


Source: U.S. Census Bureau; Bureau of Transportation Statistics; FHWA, *Highway Statistics*; FDOT

Transportation Safety







Transportation Safety

- Safety trends are influenced by a host of factors including population growth, demographic characteristics, vehicle and roadway design, behavior of all system users, enforcement, and education.
- The Florida Department of Highway Safety and Motor Vehicles (DHSMV) reported traffic fatalities decreased by 7.4% to 2,983 in 2008.
- According to the National Highway Traffic Safety Administration (NHTSA), total traffic fatalities in the U.S. decreased by 9.7% to 37,261 in 2008, the fewest since 1994. Forty seven states including Florida had fewer fatalities in 2008 than in 2007.
- Florida's fatality rate dropped for the third consecutive year to 1.50 in 2008. It declined by 4.5% from 2007.
- Of Florida's 2,983 traffic deaths in 2008, approximately 38% were bicyclists, pedestrians and motorcyclists. The Strategic Highway Safety Plan has goals and objectives to reduce the number of fatalities to these "Vulnerable Users".
- In 2008, all non-automobile fatalities declined from 2007: pedestrians by approximately 5%, motorcyclists by 3% and bicyclists by 2%.
- In 2008, about 40% of the traffic deaths in Florida were alcohol-related, an increase from the previous year.

Source: Florida DHSMV, Florida Traffic Crash Facts; NHTSA, 2008

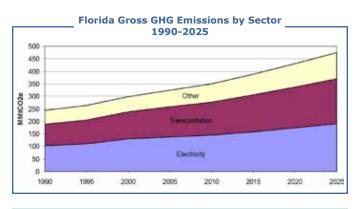
Transportation and the Environment

- Through Florida's Efficient Transportation
 Decision-Making process, FDOT continues to
 communicate and coordinate with federal, state
 and local environmental resource agencies to
 preserve and protect environmental resources
 and expedite project delivery.
- In association with capacity improvement projects, Florida has completed more than 11 million square feet of noise barriers at a total cost exceeding \$315 million.
- In 2009, three Florida Scenic Highways were named National Scenic Byways: the Big Bend Scenic Highway, the Black Bear Scenic Highway, and the Ormond Scenic Loop and Trail. The Florida Keys Scenic Highway was named an All-America Road.



Transportation and the Environment

- Among more than 350 historic highway bridges in Florida, over 100 are eligible for the National Register of Historic Places. In 2009, the department is preparing to update its historic highway bridges inventory.
- One of the initiatives to minimize environmental impacts is recycling construction materials.
 Over the last decade, recycled asphalt pavement (RAP) has increased by 8%. In fiscal year 2009, 920,000 tons of RAP were used.
- Impacts from climate change could potentially damage transportation infrastructure along the coast and in low lying areas from sea-level rise, storm surge, erosion, and flooding.
- In 2005, Florida's transportation sector accounted for about 36% of green house gas (GHG) emissions statewide, of which 63% came from on-road gasoline consumption, 15% from on-road diesel fuel use, 12% from boats and ships, and 9% from aviation.



Transportation and the Economy

 A strong competitive economy depends on an efficient transportation system. In the long run, every dollar the state invests in transportation yields an estimated \$4.92 in user and economic benefits. Additionally,



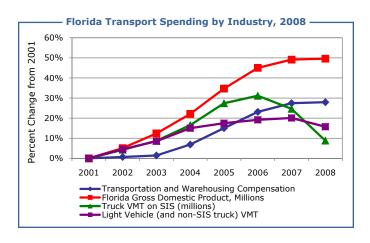
the current economic crisis has highlighted short term jobs and income generated by transportation construction.

- Every \$1 billion spent on highways supports 28,000 jobs with one third of those in construction-oriented employment.
- In 2008, Florida's international trade was valued at \$130.55 billion, an increase of 77% since 2000. Exports and imports increased by nearly 24% and 3%, respectively compared to 2007.



Transportation and the Economy

- Employment in *Transportation, Trade and Utilities*, the employment category which includes transportation workers, comprised 20.8% of total employment in Florida and decreased 2.7% between 2007 and 2008.
- Slowing economic activity levels have translated into slowing transportation and warehousing employment growth.
- Growth in freight or heavy truck miles of travel peaked in 2006 and has declined since.
- A slight decrease occurred in growth rate for light vehicle travel (cars and light trucks) from 2007 to 2008.



Source: Bureau of Economic Analysis; Bureau of Transportation

Statistics; Enterprise Florida; FDOT

Transportation Resources

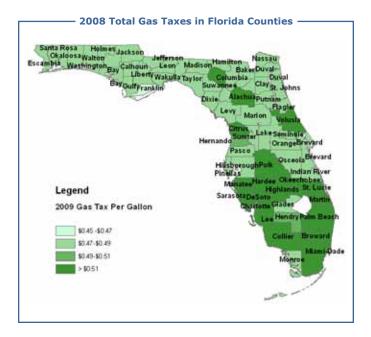
The public and businesses spend resources on transportation both directly and indirectly. The public resources, comprising the state's investment in transportation, come from a variety of sources as depicted in the graphic below.



Source: FDOT Office of Financial Development

Transportation Resources

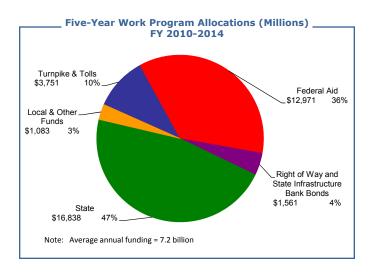
Florida's transportation revenues include fuel taxes and other fees that support local, state and federal transportation spending. The map below shows total gas taxes in each county, including federal and state taxes plus local option taxes. Local fuel taxes may be imposed by counties as a result of county legislative action and/or by referenda.



Transportation Expenditures

State and federal resources for transportation are channeled through FDOT's Five-Year Work Program. The program is complemented with local government, private and business investments in transportation vehicles, facilities and services. They collectively fund the overall transportation system.

The 2010-2014 work program is about \$5.5 billion less than the work program adopted for fiscal years 2009-2013, a reflection of revenue shortfalls since July 2008.

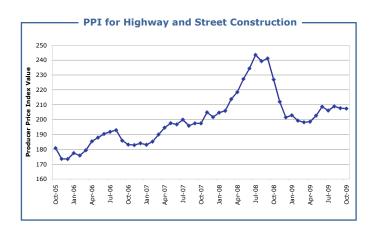


Source: FDOT Office of Financial Development

Transportation Costs

Modest revenue growth and program commitments that are outpacing revenues are resulting in severe challenges for transportation funding. Increasing pressures on state, local and private sources has resulted in a rethinking of how transportation projects should be funded in the future.

- The Producer Price Index (PPI) for Highway and Street Construction, a measure of the unit cost of construction, exhibited unprecedented growth over the past few years, far outpacing overall inflation or revenue growth.
- Rising costs in rights of way, maintenance of traffic, advanced technologies and impact mitigation have further increased overall project delivery costs.



Florida Fast Facts

General

- 18.8 million people 4th most populous state
 - 83.6% living in urban areas
 - 17% over age 65
 - 84 million annual visitors
- 58,560 square miles 22nd largest

Transportation System

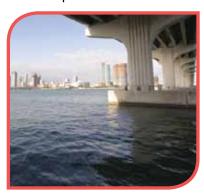
- 121,387 centerline miles of public roads
 - 12,084 centerline miles of State Highway System
 - 42,432 lane miles of State Highway System
 - 637 centerline miles of toll facilities
 - 2,783 lane miles of toll facilities
 - 708 miles of designated bike lanes on state roads
 - 11,692 bridges 6,549 maintained by the state
 - 28 fixed route transit agencies
 - 446 transportation disadvantaged operators
 - 14 seaports 7 with cruises
 - 787 airports 128 public use, 659 private use
 - 27 military
 - 19 commercial
 - 15 railroads
 - 2,796 miles of rail lines
 - 3,947 public at-grade crossings
 - 2 Amtrak routes 18 stations
 - 14.8 million registered vehicles

System Usage

- 197,952 million annual vehicle miles of travel
 - 70 million enplanements
 - 262 million transit trips
 - 13 million cruise passengers
 - 820 million tons of freight traffic

Links

- Florida Transportation Trends & Conditions www.dot.state.fl.us/planning/trends
- 2025 Florida Transportation Plan www.dot.state.fl.us/planning/ftp
- Florida Aviation Data and Forecasts
 http://www.dot.state.fl.us/aviation/dataforecasts.shtm
- FDOT Office of Financial Development www.dot.state.fl.us/financialplanning
- FDOT Transportation Statistics Office www.dot.state.fl.us/planning/statistics
- Florida Ports Council www.flaports.org/statistics.htm
- Florida Traffic Crash Facts http://www.flhsmv.gov/html/safety.html
- Florida Transportation Indicators www.floridatransportationindicators.org



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