

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.

This **Pocket Guide to Florida Transportation Trends and Conditions** is one of several products intended to assist Florida transportation policy makers and planning organizations by identifying, analyzing and disseminating information about how transportation serves and affects Florida. It 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, investments and costs associated with providing transportation.

We hope you find this publication helpful. Extensive additional information on trends and conditions regarding transportation in Florida is available at:

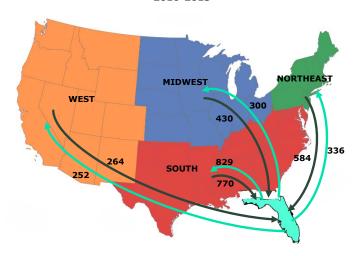
www.dot.state.fl.us/planning/trends

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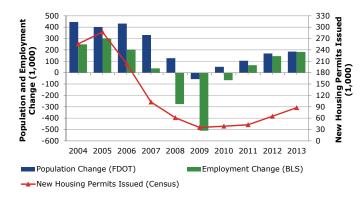
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Population

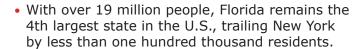
Florida Domestic Migration Flow (1,000) 2010-2013



New Housing Permits Issued per Year and — Annual Change in Population and Employment



travel demand



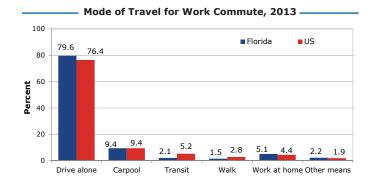
- Between 2002 and 2013, Florida's population grew 1.3% per year and about 15.5% overall.
- Florida's population grew by over 185,000 from 2012 to 2013. Only 14% of this growth was natural growth.
- Between 2010 and 2013, net domestic migration and net international immigration accounted for 84% of the state's population growth. The primary sources of Florida's domestic migration came from the Northeast and Midwest.
- From 2012 to 2013, Sumter County had the highest growth rate (+4.9%) followed by St. Johns County (+2.8%), Osceola County (+2.7%), Orange County (+2.3%), and Hillsborough County (+1.6%).
- From 2012 to 2013, 19 counties experienced an overall loss with the greatest being Hamilton County (-2.2%), Hendry County (-0.8%), and Putnam County (-0.8%).
- In 2013, Florida issued 87,432 new housing permits, nearly 35% above 2012.
- By 2040, over 24% of Florida's population is projected to be 65 and older, compared to 18.1% in 2013 and 14.6% in 1970.

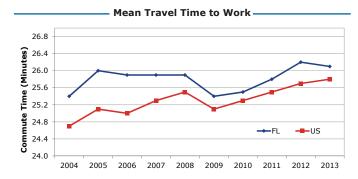
Sources: U.S. Census Bureau; Bureau of Economic and Business Research (BEBR), University of Florida; U.S. Department of Labor, Bureau of Labor Statistics (BLS); Florida Department of Transportation (FDOT)

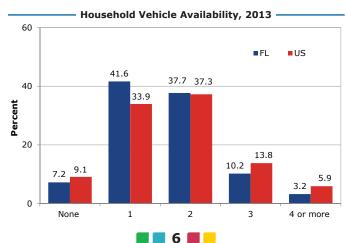




Travel Behavior of Floridians







travel demand

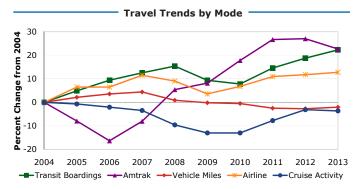
The 2013 American Community Survey found:

- Nearly 90% of Floridians continued to commute to work by automobiles, approximately 3% higher than the national average.
- In Florida, transit carried 2.1% of commuter trips, 0.1% less than in 2012. The national average was 5.2% in 2013.
- Walking commuters in Florida decreased by 0.1% in 2013 to 1.5%, with the national level remaining at 2.8%.
- The work-at-home workforce grew from 5% in 2012 to 5.1% in Florida. The national share remained steady at 4.4%.
- Average commute time decreased 0.1 minutes for Florida and increased 0.1 minutes nationally.
- About 32.7% of Florida households had no workers. The national share was 27%.
- Florida households with no cars declined to 7.2% from 7.4% in 2012, and 7.3% in 2011, below the national level of 9.1%.

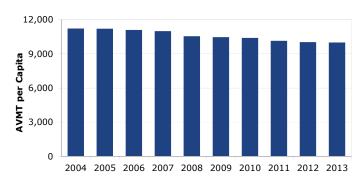


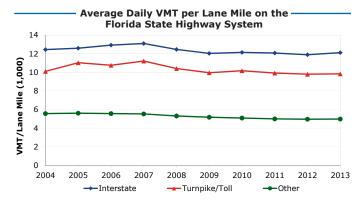
Source: U.S. Census Bureau, American Community Survey

Travel Levels



Annual Vehicle Miles Traveled (AVMT) per Capita





travel demand

In 2013:

- Vehicle Miles Traveled (VMT) in Florida increased by 0.8%. However, VMT per capita has declined every year since 2004.
- Fixed route and vanpool transit boardings increased by almost 8 million passenger trips (about 3%) over 2012.
- Amtrak ridership was down 3.4%, with cruise activity down by 0.5% from 2012.
- Florida airports experienced about 70.5 million enplanements, an increase of 1% from 2012.
- VMT per lane mile is an indicator of the intensity of highway use. For the first time since 2007, travel per lane mile on the State Highway System went up.
- Total licensed drivers grew by 0.3%. Passenger car, truck and motorcycle registrations increased about 2%.







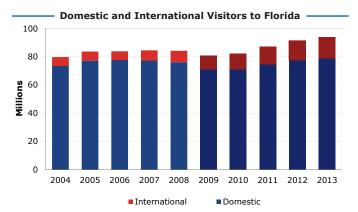
Source: FDOT; Florida Department of Highway Safety and Motor Vehicles; Amtrak; Florida Ports Council; Federal Aviation Administration (FAA); National Transit Database (NTD)

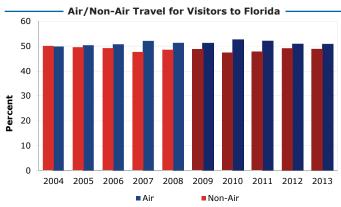
Note: Licensed drivers and vehicle registrations as of January 1, 2014.

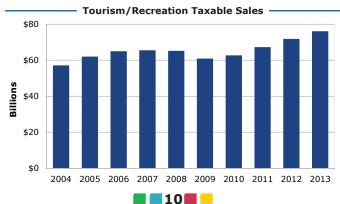




Tourism and Travel







travel demand

In 2013:

- Florida hosted 93.7 million visitors/tourists, an increase of about 2.1 million (2.3%) over 2012.
- Domestic visitors to Florida outnumbered international visitors by 5.3 to 1.
- There were approximately 4.8 visitors to the state for every resident.
- Nearly 51% of all visitors to Florida arrived by air.





- Taxable spending on tourism/recreation reached about \$76.1 billion, up more than 6.1% from 2012.
- The tourism industry directly employed about 1.1 million persons, 3.7% more than in 2012.
- There were approximately 14.1 million cruise revenue passengers in fiscal year (FY) 2012/ 2013, with:
 - Port of Miami at over 4 million passengers
 - Port Canaveral at nearly 4 million
 - Port Everglades at over 3.6 million passengers

Sources: VISIT FLORIDA; Florida Ports Council

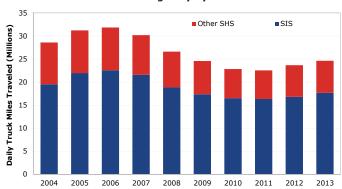
Note: New visitor estimation methodology since 2009; comparisons to pre-2009 are not appropriate.



Trade and Freight Transportation



Truck Miles Traveled on the State Highway System





travel demand

By virtue of its geography and economy, Florida has a diversity of freight modes available to meet the needs of shippers of various products generated and consumed in Florida.



- Truck Miles Traveled (TMT) on the entire State Highway System increased 4% from 2012.
 On the Strategic Intermodal System, TMT increased about 5.2% and accounted for 10.8% of vehicle miles of travel in 2013.
- Freight tonnage in Florida increased from the previous year in all modes.
- Nationally, Florida ranks fourth in total air cargo tonnage with almost 2.5 million tons of annual air cargo. Of the top ten states, Florida's air cargo volume accounts for 11% of the market share. Miami International Airport dominates with a 79% market share among all Florida airports.
- Phosphate comprised 37% of total originating rail freight tonnage in 2012. Phosphate rock is used mainly in the production of fertilizers and animal nutrient supplements. Most of the chemicals originating by rail in Florida are fertilizers.
- Waterborne cargo in Florida increased to \$85.9 billion in trade value in 2013, growing 0.4% from 2012.

Sources: FDOT; Association of American Railroads; USDOT Bureau of Transportation Statistics; Florida Ports Council

Strategic Intermodal System

The Strategic Intermodal System (SIS) is a statewide network of high-priority transportation facilities where focusing investments produces the greatest impact on commerce and economic competitiveness. The following table summarizes the SIS facilities.

	-	Strategic	Intermodal	S	ystem	Fa	cilities
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Facility Type	SIS	Emerging SIS
Commercial service airports	7	10
General aviation reliever airports	2	0
Spaceports	2	0
Deepwater seaports	7	5
Freight terminals	5	16
Urban fixed guideway stations/hubs	14	0
Interregional passenger stations/hubs	5	17
Rail corridors	1,705 mi	358 mi
Waterway corridors	1,632 mi	306 mi
Highway corridors	3,605 mi	761 mi
All Connectors Military access facility	741 mi (40 mi)	16 mi (0)

- The SIS and Emerging SIS facilities account for 17 of Florida's 19 commercial service airports, and carry 99% of all passenger enplanements and 100% of the air cargo tonnage.
- Twelve of the state's 15 deepwater seaports are SIS and Emerging SIS facilities. They serve 94% of all cruise passengers and transport 100% of all waterborne freight tonnage in the state.
- Of the state's 12,099 miles of State Highway System, 4,366 miles are designated as the SIS or Emerging SIS, carrying 57% of all vehicle miles and 72% of all truck miles in Florida.

Note: Data as of October 2014. Includes Planned Add SIS and Emerging SIS in the totals.

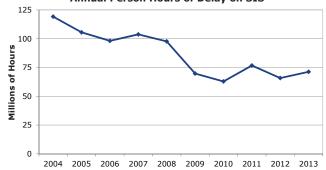
the transportation system

- The 2015-2040 SIS Funding Strategy identifies financially feasible projects worth \$38.2 billion. The 2040 Multi-Modal Unfunded Needs Plan identifies over \$131 billion of unfunded needs for SIS projects that would help meet mobility needs.
- The 2015-2019 Five-Year Work Program has \$13.6 billion allocated towards SIS capacity projects, 89% of which is programmed for SIS highway capacity improvements with the balance invested in other modes.
- Annual person hours of delay on the SIS have followed a general declining trend over the past decade, decreasing over 40% from 2004.

SIS Multimodal Unfunded Needs

Mode	Total (\$ Millions)
Aviation	2,395
Highway	82,676
Rail	14,554
Seaport	7,211
Spaceport	691
Transit	23,659
TOTAL	\$131,186

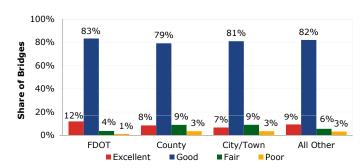


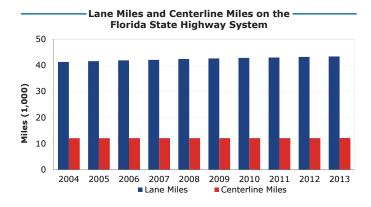


Source: FDOT



— FY 2014 Bridge Condition by Maintenance Responsibility ——



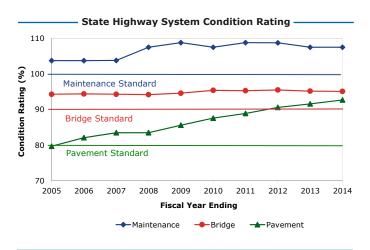


the transportation system

 Florida has 122,088 centerline miles of public roads, up 259 miles from 2012. Lane miles on the Florida State Highway System (SHS) grew less than 1% since 2012.



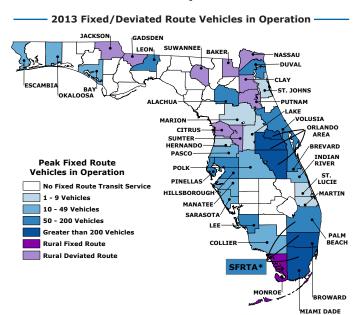
- The SHS is less than 10% of the entire Florida roadway network, but it carries 55% of all daily traffic.
- Urban and rural roads functionally classified as "local" comprise approximately 76% of the public road centerline miles.
- Over 95% (6,453) of the state-maintained bridges are in excellent or good condition.
- Statutorily required maintenance, bridge and pavement standards have been exceeded.



Source: FDOT

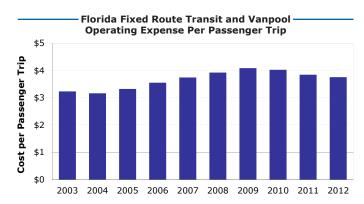


Transit Systems



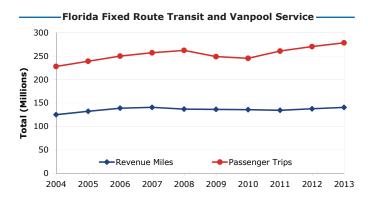
*South Florida Regional Transportation Authority

Note: Peak vehicles represent the greatest number of transit vehicles in operation at one time. A deviated route system is a transit service that operates along a fixed route, but may deviate from the route by request.



the transportation system

- Passenger boardings on fixed route and vanpool services were over 278 million in 2013, an increase of about 3% from 2012. Seven Florida vanpool agencies reported almost 1.3 million total passenger trips.
- Revenue miles of transit service increased about 2.1% in 2013 as the operating expense per passenger trip continued to decrease.
- In 2013, Miami-Dade Transit carried almost 4.1 million more passengers than in 2012. Its ridership was about 40% of the statewide total. Other notable increases include Hillsborough County, up 408,000, and Pinellas County, up 437,000 passengers.
- Roughly 80% of Florida's population resides within three-guarters of a mile of a transit route.
- SunRail began operating in Spring 2014. This commuter rail serves Orange, Seminole and Volusia Counties.



Source: NTD; FDOT

Note: In 2013, Florida had 29 urban fixed route systems and 1 rural fixed route system. SunRail began operations in 2014 and is not included in the 2013 system data.

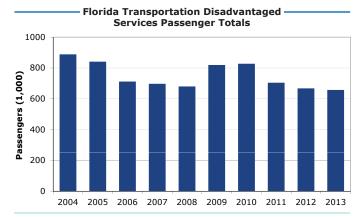






Transportation Disadvantaged Services

- Florida's Transportation Disadvantaged (TD) Program coordinated and provided over 49.6 million trips, approximately 1.9 million more than in 2012.
- Fixed route transit services provided 34.3 million TD Program trips.
- Of the trips provided by the TD Program, 18% were for medical purposes, 6% for employment purposes, 13% for education/training, 3% for nutrition, and 60% for life-sustaining/other services.
- Florida's residents 60 and older account for 33% of TD trips; children make up 19%; low-income persons compose 25%; disabled persons account for 8%; low-income/disabled persons represent 11%; and 4% are in the other category.
- There were 188,311 unmet TD trip requests, an increase of 49% from 2012.



Source: Florida Commission for the Transportation Disadvantaged

the transportation system

Walking and Bicycle Facilities and Travel

 Of the 9,888 non-limited access centerline miles on the State Highway System (SHS), about 60% had bicycle facilities (5,888). For the 5,014 urban non-limited access centerline miles on the SHS, over 64%



had pedestrian facilities (3,214) in 2013.

- The seven largest counties accounted for 28% of the urban bicycle facilities and 45% of the urban pedestrian facilities.
- Since 2007, the National Safe Routes to School Program has assisted in funding 207 projects in Florida. During 2007-2013, \$61.9 million was invested using state and federal funding.
- Over 882,000 U.S. commuters and over 58,000 Florida commuters reported biking as their primary mode of travel to work, a 2% and a 2.4% increase from 2012, respectively.
- Bikes-on-bus usage has generally grown in Florida. Since 2009, PSTA and HART have had a fluctuating trend while the Space Coast and StarMetro have experienced growth of 54% and 20%, respectively.

Florida Monthly Rikes-on-Rus Roardings

Fiorita Fioritiny bikes-on-bus boardings						
Agency	2009	2010	2011	2012	2013	
PSTA, St. Petersburg	29,439	31,178	30,118	31,358	33,137	
HART, Tampa	17,925	18,213	19,354	18,880	18,706	
Space Coast, Brevard	10,176	11,480	13,545	15,166	15,636	
StarMetro,Tallahassee	2,209	2,196	2,325	2,877	2,652	

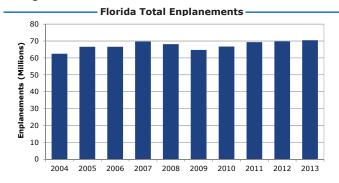
Sources: FDOT; U.S. Census Bureau; National Center for Safe Routes to School; individual transit agencies

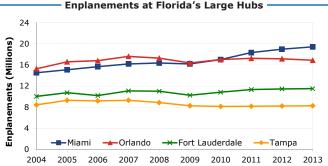
Note: Photo credit to Deco Bike LLC



Airports

- Out of 775 facilities, Florida has 19 Commercial Service and 110 General Aviation public use airports, which host more than 13,400 based aircraft*. Florida is the only state with four large hubs and leads the world in pilot training.
- Air travel plays an important role in Florida's tourism. Over 50% of tourists arrive by air.
- Over the past 10 years, passenger enplanements have grown an average of 1.2% per year. Almost 80% of all enplanements took place at the four large hubs.





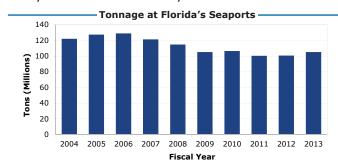
Sources: FDOT Aviation Office; FAA

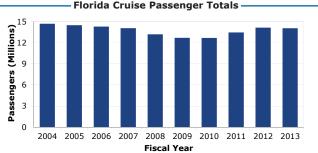
the transportation system

Seaports

In FY 2013:

- Florida's 15 deepwater seaports moved 105.1 million tons of cargo and handled over 3.2 million 20-foot equivalent container units.
- Florida's total waterborne cargo value increased by 0.4%, container movements by 3.9% and waterborne tonnage by 4.4% over 2012.
- Seven of Florida's 15 deepwater seaports carried nearly 14.1 million cruise passengers, 0.5% less than in 2012. Multi-day cruises accounted for approximately 13.7 million passengers, a decrease of 0.8%, whereas oneday cruises increased by 8.2%.





Sources: Florida Ports Council; FDOT



^{*}An aircraft permanently stationed at an airport, usually by agreement between the aircraft owner and airport management.

Rail Facilities and Services

- Of the 2,753 miles of mainline track in Florida, all but 143 miles are owned by 15 freight railroads who control the entire track.
- According to the Federal Railroad Administration, there were 3,784 public at-grade rail crossings in Florida as of January 2014, which present both safety and mobility challenges.
- In 2012, Florida's freight railroads moved nearly 82.5 million tons of freight.
- In 2012, Florida originated 764,700 rail carloads, a 1.3% increase from 2011 and terminated 1,221,000 carloads, a 4.8% increase. Florida ranks 13th and 9th among states, respectively, for originating and terminating tonnage.

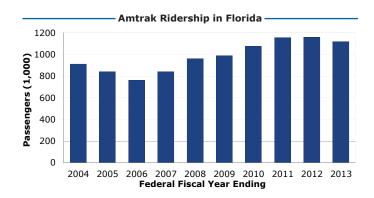
Class I Railroads CSX Transportation Norfolk Southern Corporation Class II Railroads Florida East Coast Railway Class III Railroads

the transportation system

 In FY 2013, the Auto Train carried over 265,000 passengers, removing over 139,000 vehicles from highways connecting Florida with the Northeast.



- In 2013, Amtrak carried
 1.1 million passengers in Florida. Ridership decreased for the first time in seven years, but still remained 46.6 percent above the 2006 level.
- Amtrak employed 782 Florida residents in 2013.
- Florida East Coast Industries (FECI) is working on All Aboard Florida, a privately owned and operated intercity passenger rail service from Miami to Orlando, with stops in Fort Lauderdale and West Palm Beach. Its proposed service begins in 2016.

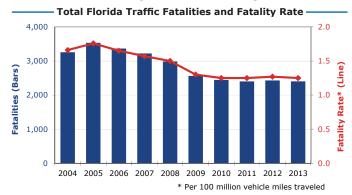


Sources: FDOT Rail Office; Amtrak; Association of American Railroads; Federal Railroad Administration

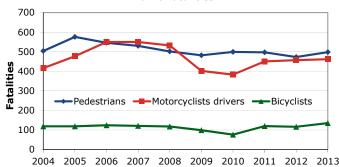
Note: Existing urban rail transit services are included in the transit pages of the pocket guide.



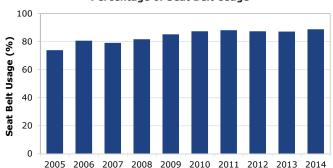
Transportation Safety



Florida Bicyclist, Motorcyclist and Pedestrian Traffic Fatalities



Percentage of Seat Belt Usage



transportation impacts

When compared with 2012, in 2013:

- Total traffic fatalities in the U.S. decreased by 2.1% to 32,850, resuming the decreasing trend which occurred from 2006 to 2011.
- The Florida Department of Highway Safety and Motor Vehicles (DHSMV) reported traffic fatalities decreased by 1.2% to 2,402.
- Florida's fatality rate decreased slightly to 1.25 fatalities per 100 million vehicle miles, returning to the 2011 level.
- Of Florida's 2,402 traffic deaths, 46% were bicyclists, pedestrians, and motorcyclists.
 Florida's Strategic Highway Safety Plan includes strategies to reduce the number of Vulnerable Road Users fatalities.
- Pedestrian and bicyclist fatalities increased by 5.3% and 16.4% respectively. Total motorcycle fatalities increased by 1.1%. Non Vulnerable Road User fatalities decreased 5.9%.
- Fatalities of teen drivers and passengers saw a significant decrease of 17.6% from 125 to 103.
- Seat belt usage on Florida's roads is at an alltime high of 88.8% and continues to climb.
- Florida passed a texting and driving ban on October 1, 2013. The state is still gathering data on the safety effects.

Sources: Florida Department of Highway Safety and Motor Vehicles; National Highway Traffic Safety Administration





Transportation and Land Use

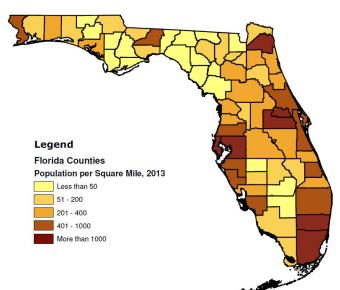
Land-use intensity and patterns influence transportation system performance, energy use, safety, travel speed and consumption of land.

Land Use and Transportation Relationship Definitions -

Access	e ability to enter and exit a property via the ansportation network.		
	Ability to reach desired destinations, activities, goods and services.		
Mobility	The movement of people and goods.		

Population distribution impacts travel behavior. Florida's population is concentrated in established metropolitan areas, whereas substantial sections of the state remain sparsely populated.

Population Density 2013



transportation impacts

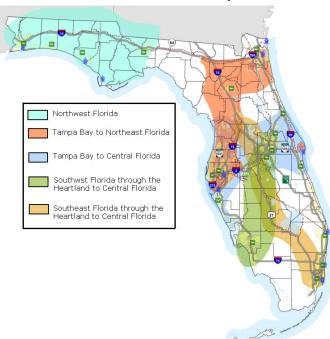






Large scale, long range transportation needs are being addressed by planning for major corridors that connect Florida's regions. These future corridors will help advance the state's economic competitiveness and quality of life over the next 50 years.

Florida's Future Corridor Study Areas



Sources: U.S. Census Bureau, *American Community Survey*; FDOT; National Highway Institute

Note: Photos credit to Suncoast News





Transportation and the Environment

FDOT continues to work toward incorporating the full consideration of the physical, sociocultural, and natural environment in conjunction with transportation engineering analysis. Part of those considerations includes a full understanding of how transportation decisions potentially affect people and their communities. Initiatives include:

 Updating the mitigation law in Florida, by working with public agencies, nongovernmental organizations and private entities, which now allows more innovative approaches to mitigation that still comply with federal



and state requirements. The Florida Legislature passed the revised law and it became effective July 1, 2014.

- Funding a study of the Perdido Key beach mouse, in coordination with the Florida Fish and Wildlife Conservation Commission and led by the U.S. Fish and Wildlife Service. Research is looking at population distribution and dispersion of this most endangered mammal in Florida to develop the most appropriate structures for them to cross the highway in Perdido Key.
- Using a recently developed carbon monoxide screening model to ensure the national ambient air quality standard for carbon monoxide is not exceeded at the project level. To date all projects are meeting these standards. The screening model incorporates the new Environmental Protection Agency emission factors model and more geometric intersection types, and adds a toll booth option.

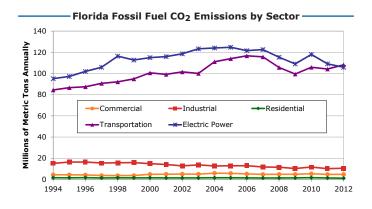
transportation impacts

 Conducting hydroacoustic monitoring of pile driving activities at bridge projects. The objective of these studies was to collect sound pressure levels with respect to distance from pile driving activities in an attempt to



gauge the effects of pile driving on gulf sturgeon, the West Indian manatee, five species of sea turtles, smalltooth sawfish, and mangrove rivulus. It is anticipated that the sound levels measured from these two studies, combined with the types of piling typically used, will provide a representative analysis of future bridge projects in Florida.

FDOT's state-of-the-practice leadership has led to an invitation from the Transportation Research Board (TRB) to present its sociocultural analysis approach at TRB's annual meeting in 2015.



Sources: FDOT; U.S. Environmental Protection Agency (EPA); U.S. Energy Information Administration

Transportation and the Economy

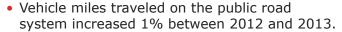
 From 2011 to 2013, Florida's real Gross Domestic Product increased by an estimated 2.2% per year, showing renewed economic growth exceeding the population increase of 1.3% per year.



- Florida is focusing the state's role in transportation provision on statewide and interregional travel as well as reemphasizing the critical linkage among transportation, economic competitiveness and land use.
- Florida's international trade totaled \$158.4 billion in 2013, a 2.3% decrease from the alltime high reached in 2012.
- As the seventh-largest export state in the U.S., Florida exported goods and services worth over \$85 billion in 2013. Exports exceeded imports by over \$12 billion.



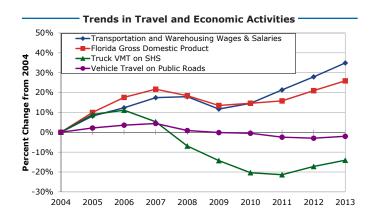
transportation impacts



 In 2013, truck miles traveled on the State Highway System (SHS) continued a rebound and constituted 8.6% of vehicle miles traveled on the SHS.



- Disbursements of wages and salaries for transportation and warehousing industries saw a gain of over 5.5% in 2013, reaching a new record.
- Employment in Transportation and Material Moving Occupations, which includes most direct transportation workers, accounts for 6% of total employment in Florida. In 2013, the industry employed an estimated 444,900 workers, up from 423,830 in 2012.



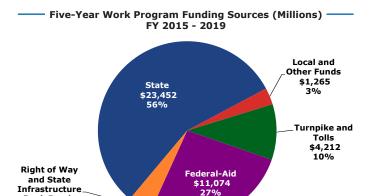
Sources: U.S. Bureau of Labor Statistics; U.S. Bureau of Economic Analysis; FDOT





transportation funding

Transportation Resources

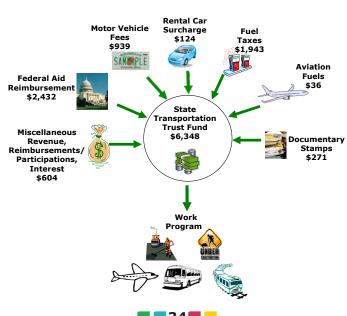


Total Five-Year Adopted Work Program \$41,807M

Bank Bonds

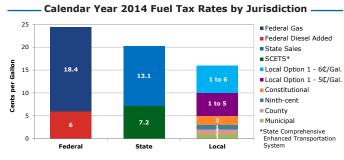
\$1,804 4%

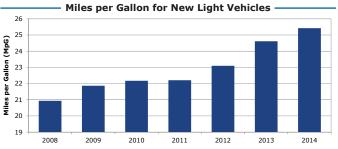
— State Transportation Trust Fund Receipts (Millions) FY 2013 - 2014



transportation funding

- Resources for the Five-Year Work Program mainly come from the state (56%) and federal aid (27%), and represent the planned commitments over the next five years.
- A variety of sources support past and present commitments of the State Transportation Trust Fund: fuel taxes, motor vehicle fees, rental car surcharges, etc.
- Total fuel tax rates are the sum of federal, state and local taxes. The tax rates for a gallon of motor fuel vary by county. The maximum rate per gallon for gasoline is 54.7 cents and for diesel is 55.7 cents.
- Average fuel efficiency of new vehicles increased by nearly 5 miles per gallon from 2008 to 2014.





Source: FDOT Office of Comptroller; IHS Connect



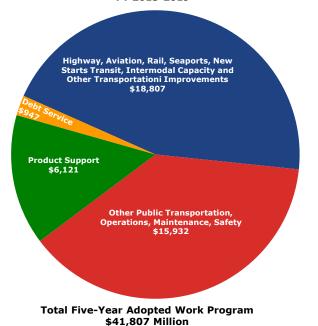
transportation funding

Transportation Investments

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

The 2015-2019 Work Program increased 6.7% or \$2.6 billion from the 2014-2018 Work Program. The majority of the increase occurred in the allocations for transportation improvements.

Five-Year Work Program Allocations (Millions) -FY 2015-2019



Source: FDOT Office of Work Program & Budget

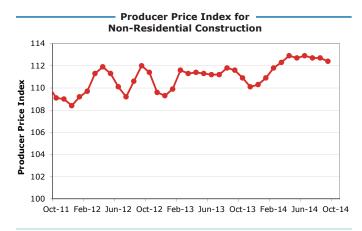
transportation funding

Transportation Costs

- Nationally, construction costs rose about 2 percent over the past three years.
- After moderate fluctuations in 2013, construction cost estimates hit a plateau for much of 2014.



- Total construction employment in Florida, including transportation construction, increased by about 100,000 workers over the past two years.
- Transportation construction costs are influenced by automation, construction industry capacity, and costs of major inputs, including labor, fuel and materials.



Source: U.S. Bureau of Labor Statistics

Note: Non-residential construction includes highway, street and heavy construction.



fast facts and links

Florida Fast Facts

General

19.3 million people - 4th most populous state

- 87.5% living in urban areas
- 18.7% over age 65
- 93.7 million annual visitors
- 53,625 square miles of land 26th largest

Transportation System:

- 122,088 centerline miles of public roads
 - 12,099 centerline miles of State Highway System
 - 43,402 lane miles of State Highway System
 - 664 centerline miles of toll facilities
 - 3,041 lane miles of toll facilities
 - 12,164 bridges, 6,783 maintained by the state
 - 30 urban fixed route transit agencies
 - 10 rural fixed/deviated route transit agencies
 - 429 transportation disadvantaged operators
 - 15 deepwater seaports, 7 with cruises
 - 775 airports
 - 129 public use
 - 646 private use
 - 2 spaceports
 - 15 railroads
 - 2,753 miles of mainline track
 - 3,784 public at-grade crossings
 - 2 Amtrak routes 18 stations
 - 14 million registered motor vehicles

System Usage:

- 192,702 million annual vehicle miles of travel
 - 70 million enplanements
 - 278 million transit trips
 - 50 million transportation disadvantaged trips
 - 14 million cruise passengers
 - 991 million tons of freight*

Note: *2012 Data

fast facts and links

Links

Florida Transportation Plans and Studies

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

Florida Transportation Performance

www.fdotperforms.org

Florida Transportation Trends and Conditions

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

Florida's Transportation System by the Numbers

www.dot.state.fl.us/intermodal/system

FDOT Transportation Statistics Office

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

Florida Transportation Indicators www.floridatransportationindicators.org

Florida Ports Council

www.flaports.org

Florida Aviation Data and Forecasts

www.dot.state.fl.us/aviation/dataforecasts.shtm



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