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*Please Note:
  Orlando Country changed to Orlando/Apopka Country Airport
  Avon Park changed to Avon Park Executive Airport
  Kay Larkin changed to Palatka Municipal-LT Kay Larkin Field
  Panama City changed to Panama City-Bay County International Airport
  Orlando Executive changed to Executive Airport
2.9.6.2 Establish Florida Growth Areas

The demand for both commercial and general aviation (community airports) services is closely tied to various socio-economic and demographic factors. Two indicators that have been proven by the FAA to have a high correlation with demand for aviation services are population and employment. Current population and employment densities for counties within each of the nine CFASPP regions have played and play an important role in determining local and regional aviation demand levels. While current population and employment densities help to explain historic and current aviation demand patterns, having an understanding of where growth is expected in the future establishes indicators that point toward areas of the state where aviation demand may grow in the future.

This section of the 2.9.6 analysis provides information that can be used on the state and regional level to provide a better understanding of how well matched Florida’s airport system is to current levels of population and employment within the state. Information presented in this section also provides insight into where growth is expected in the future. Information presented in this section helps to determine if there are areas within Florida where current demand or future growth in population or employment may contribute to the need for improved airport facilities at commercial or community airports in one or more CFASPP regions.

Population Statewide

Considerable research was completed as part of FASP Tasks 2.9.1 and 2.9.2 that documented Florida’s unparalleled socio-economic and demographic trends. Without question, Florida has been and will continue to be one of the fastest growing states in the U.S. Exhibit 2.9.6.2-1 provides an overview of current population densities throughout the state. As might be expected and for the most part, Florida’s highest population concentrations are found in counties that are home to the state’s major urban areas. Population density in Florida tends also to follow the state’s coastline and its interstate corridors. As reflected in Exhibit 2.9.6.2-1, those Florida counties that now have the highest concentrations of population are in the Miami-Fort Lauderdale-Palm Beach metropolitan area and in the Tampa metropolitan area.

Exhibit 2.9.6.2-1 also reflects Florida’s system of public airports. The development of Florida’s public airport system was influenced by military training fields built primarily to train pilots during WW II. The public airport system also mirrors the coastal areas and interstate highways of the Florida. As shown in Exhibit 2.9.6.2-1, most of the Florida’s more densely populated areas are now served by one or more public airports.

Exhibit 2.9.6.2-2 reflects those counties in Florida that, on a relative basis, are projected to have the greatest rates of population growth between 2000 and 2030. When the information presented in Exhibit 2.9.6.2-1 and Exhibit 2.9.6.2-2 is compared, it is interesting to note that some of the counties that now have the highest concentrations of population are not projected to have the highest rates of population growth in the future. The growth rates reflected in Exhibit 2.9.6.2-2 indicate that counties that currently border many of the state’s most densely populated areas could see higher rates of future growth.

Florida is faced with several challenges. The state must continue to maintain and expand as needed those airports that serve the most densely inhabited areas of the state. At the same time, Florida must look to the future. Immigration is taking place at a significant rate. As Florida grows, FASP 2004 provides information that enables FDOT to make informed decisions about its system of public airports. FASP 2004 helps FDOT and each CFASPP region to gage the ability of the exiting airport system to meet current demand, while at the same time underpinning a strategic approach to identifying and planning airport facilities to meet longer term needs.
FLORIDA AVIATION SYSTEM PLAN
Population Growth Rate from 2000 to 2030 - Statewide By County

LEGEND
Florida County
Population Growth
Below 25.0%
25.1 - 35.0%
35.1 - 45.0%
45.1 - 55.0%
55.1 - 65.0%
65.1 - 80.0%
80.1 - 100.0%
Above 100.1%

Source: 2000 U.S. Census, 2004 Woods & Poole Data

Wilbur Smith Associates
Regional Summaries

Central Florida Region Population

The Central Florida Region is one of two CFASPP regions that has only community airports. There are no commercial airports in this CFASPP region. This area lies just to the south of the Orlando metropolitan area. As might be expected and as shown on Exhibit 2.9.6.2-3, Polk County which is closest to the Orlando metropolitan area now has the highest concentration of population. This county is also home to eight community airports that are open to the public. Several of the airports in this part of the state help to support the business and tourism needs of greater Orlando area.

As noted on Exhibit 2.9.6.2-4, while the highest concentrations of population will stay in those area’s of this CFASPP region that are in closest geographic proximity to the Orlando area, the rate of population increase for counties in the southern part of this CFASPP region, De Soto County and Highlands County, is projected to be higher. As shown on Exhibit 2.9.6.2-4, there are fewer public airports in the southern portion of this CFASPP region. Accelerated rates of population growth in the noted counties may indicate the need for a longer term strategy to meet the aviation needs of this region.
Section 2.9.6.2 Establish Florida Growth Areas
East Central Florida Metropolitan Area Population

Historically, counties in this CFASPP region have experienced notable growth. As reflected on Exhibit 2.9.6.2-5, counties in this area now have relatively similar levels of population concentration. While this CFASPP region is not the most densely populated, the number of adjacent counties that house relatively large concentrations of population make this region one of Florida’s most populated. This area is home to four of Florida’s commercial airports and many community airports, as shown on Exhibit 2.9.6.2-5. Much of the airport development in this CFASPP region follows the I-4, I-95, and Florida Turnpike corridors.

As shown on Exhibit 2.9.6.2-6, Seminole and Orange counties, the primary counties for the greater Orlando metropolitan area are expected to continue to add population at a fairly high rate. Population growth to the west in Lake County is expected to take place at a slightly lower rate over the next 30 years. Coastal counties, Volusia and Brevard, are projected to grow at lower rates. It is worth noting that while the current population density in Flagler County lags behind the other counties in this CFASPP region, Flagler County is projected to have one of the highest rates of population increase in this area of Florida. Osceola County, however, is expected to have the highest rate of population increase in this area. This is worth noting because Kissimmee Gateway is the only public airport in this county. As will be documented in a subsequent section of this report, the operational capacity of Kissimmee Gateway is not expected to be sufficient to efficiently process projected aviation demand. This airport is one of the primary “relievers” for Orlando International. Following the Florida Turnpike south through Osceola County, there are no other public airports in this CFASPP region. Projected population growth coupled with anticipated shortfalls in operational capacity indicate that future strategic planning consider an approach to providing sufficient longer term airport facilities for the East Central Florida Metropolitan Area.
North Central Florida Region Population

As reflected in Exhibit 2.9.6.2-7, many counties in this CFASPP region are not densely populated. The two most densely populated counties in this region are Marion (Ocala) and Alachua (Gainesville). Gainesville Regional is the only commercial airport in this CFASPP region. As depicted on Exhibit 2.9.6.2-7, there are many community airports in this region. This is one of the largest CFASPP regions, from a geographic standpoint, it borders both the Jacksonville and the Orlando metropolitan areas, extending all the way to the Georgia border. Review of the statewide map showing population density (Exhibit 2.9.6.2-1) shows that the counties in the northwest portion of this region are among the least density populated in the state.

As shown on Exhibit 2.9.6.2-8, counties in the northwestern portion of this CFASPP region are not projected to grow at significant rates. Gilchrist and Citrus counties are projected to have the highest rates of population growth in this region. While much of this region is expected to experience at least modest population growth rates, it is interesting to note that the rate of population growth for Alachua County is expected to be lower than average. There are several counties in this CFASPP region that do not have a public airport; this is true for both Madison and Hamilton along the Georgia border. Both of these counties are not densely populated and neither is projected to have a rapid rate of population increase. Union and Bradford counties that border the Northwest Florida Metropolitan Area also lack public airport facilities. Counties in the neighboring CFASPP area are also generally lacking in public airport facilities. Bradford County is projected to grow at modest rate. Future planning may need to consider the need for increasing airport resources in this general area of the state.
Northeast Florida Metropolitan Area Population

Duval County is the home of the Jacksonville metropolitan area. Exhibit 2.9.6.2-9 shows that this county has the highest concentration of population in this CFAASPP region. The next most densely populated counties in this area all border Duval County. As noted on Exhibit 2.9.6.2-9, there are four public airports in Duval County, including Jacksonville International Airport.

Exhibit 2.9.6.2-10 shows that in the future the highest rates of population increase are expected in the counties that border Duval County. As shown on this exhibit, Clay County and St. Johns County, both to the south of the Jacksonville metropolitan area, are projected to have the highest rates of population increase. Nassau County to the north of the metropolitan area is also projected to see an above average rate of increase in its population growth. While Nassau County has two public airports, both Clay and St. Johns counties each have only one public airport. Future growth in this area may predicate the need to consider improved airport facilities. Baker County is also projected to have a higher than average rate of population increase. There is no public airport in this county and it is worth noting that neighboring counties in other CFASPP regions also are without a public airport.
Northwest Florida Region Population

**Exhibit 2.9.6.2-11** shows that many of the counties in this CFASPP region are not densely populated. The counties with the highest concentrations of population are Leon, Okaloosa, and Escambia. Each of these counties is home to a commercial airport and at least one community airport. It is worth noting that the locations of public airports in this region closely parallel the I-10 corridor and the coastline.

**Exhibit 2.9.2.2-12** shows those counties in this CFASPP region that are projected to have the highest rates of population increase. While Leon County is projected to grow at an above average rate, Wakulla County to its south is actually projected to grow at a higher rate. The same can be said for Okaloosa County. While Okaloosa County’s rate of population growth is predicted to be above average, both Walton and Santa Rosa counties which border Okaloosa County are projected to have higher rates of population increase. Escambia County, one of the most densely populated counties in this CFASPP region today is projected to have a below average rate of population growth. Counties in this CFASPP region that are expected to have the highest rates of population growth each have at least one public airport.
Section 2.9.6.2 Establish Florida Growth Areas
Southeast Florida Metropolitan Area Population

Counties in this CFASPP region are among the most densely populated in the state. While Dade County has the highest rate of population concentration, both Broward and Palm Beach counties are also densely populated. Exhibit 2.9.6.2-13 reflects current population density in this area. Each of these three counties has a commercial airport and each have several community airports. As shown on Exhibit 2.9.6.2-13, the locations of airports in this CFASPP region closely follow the I-95 corridor.

Exhibit 2.9.6.2-14 shows that Palm Beach County is expected to have the highest rate of population growth among all counties in this area. While Broward County is also expected to have a population growth rate that is above the state average, the rate of population growth in Dade County is expected to slow considerably. Many of the airports in the Southeast Florida Metropolitan area face shortfalls in operational capacity. As a result of current population densities in this area of Florida, even modest rates of population growth will put additional pressures on already congested airport facilities.
Section 2.9.6.2 Establish Florida Growth Areas

FLORIDA AVIATION SYSTEM PLAN
2000 Population Density - Southeast Florida Metropolitan Area

LEGEND
Florida County
Population Density
- Less Than 25,000
- 25,001 - 50,000
- 50,001 - 100,000
- 100,001 - 150,000
- 150,001 - 500,000
- 500,001 - 1,000,000
- 1,000,001 - 2,000,000
- 2,000,001 - 3,000,000

System Airport
Interstate
Ocean

0 10 20 30 Miles

FLORIDA AVIATION SYSTEM PLAN
Population Growth Rate from 2000 to 2030 - Southeast Florida Metropolitan Area

LEGEND
Florida County
Population Growth
- Below 25.0%
- 25.1 - 35.0%
- 35.1 - 45.0%
- 45.1 - 55.0%
- 55.1 - 65.0%
- 65.1 - 80.0%
- 80.1 - 100.0%
- Above 100.1%

System Airport
Interstate
Ocean

0 10 20 30 Miles

Wilbur Smith Associates

Section 2.9.6.2
Southwest Florida Region Population

As depicted on Exhibit 2.9.6.2-15, most counties in this CFASPP region have average to slightly above average concentrations of population. Manatee, Sarasota, Lee, and Collier counties have the highest concentrations of existing population. These counties house two commercial airports and several community airports. Most of the population in this region follows the I-75 corridor. Many of the airports follow this same transportation corridor; however, some airports are also located in the less densely populated interior portions of these counties.

As shown on Exhibit 2.9.6.2-16, population in many of the counties in this region are expected to grow at above average rates. The highest rates of population increase are expected in Charlotte and Manatee counties, followed by Lee and Collier counties. Growing population in this region will increase the demand for airport facilities.
Section 2.9.6.2 Establish Florida Growth Areas

FLORIDA AVIATION SYSTEM PLAN
2000 Population Density - Southwest Florida Region

FLORIDA AVIATION SYSTEM PLAN
Population Growth Rate from 2000 to 2030 - Southwest Florida Region
Treasure Coast Region Population

As noted on **Exhibit 2.9.6.2-17**, St. Lucie County has the greatest concentration of population in this CFASPP region. There is only one public airport in this county. The Treasure Coast Region does not have a commercial airport.

**Exhibit 2.9.6.2-18** reflects anticipated rates of population growth for this region. As shown, the counties that neighbor St. Lucie County are projected to have the highest rates of population increase. To the north of St. Lucie County is Indian River County and to the south is Martin County. Each of these two counties has at least two public airports.
Section 2.9.6.2 Establish Florida Growth Areas

FLORIDA AVIATION SYSTEM PLAN
2000 Population Density - Treasure Coast Region

FLORIDA AVIATION SYSTEM PLAN
Population Growth Rate from 2000 to 2030 - Treasure Coast Region
West Central Florida Metropolitan Area Population

Hillsborough County is one of Florida’s most densely populated counties. This county has four public airports. Neighboring Pinellas and Pasco counties also have above average concentrations of population. Each of these counties has three public airports. Current levels of population concentration for the counties in this CFASPP region are depicted on Exhibit 2.9.6.2-19. This area has two commercial airports.

As shown on Exhibit 2.9.6.2-20, Hernando County, now the least densely populated in this region, is expected to have the highest rate of population growth. There is only one public airport in this county. Hillsborough and Pasco counties are expected to have rates of population increase that are above the state average, but the rate of population increase in Pinellas County is expected to slow considerably.
Employment Statewide

Exhibit 2.9.6.2-21 reflects current employment concentrations throughout Florida. Not surprisingly, the heaviest concentrations of employment are found in Florida’s major urban areas. The Miami, Fort Lauderdale, Orlando and Tampa metropolitan areas, as can be seen on Exhibit 2.9.6.2-21 have the highest levels of employment concentration. Other urban centers throughout the state also have relatively higher levels of employment concentration, as do those counties that are in proximity to the counties that are home to the state’s largest cities.

Exhibit 2.9.6.2-22 shows counties throughout Florida expected to have the greatest rates of employment growth. As with population, the greatest percentage increases in employment are generally expected in those counties that now border Florida’s counties that currently have the highest concentrations of the state’s employment. Generally, when the information in Exhibits 2.9.6.2-2 and 2.9.6.2-22 is compared, those counties projected to have the highest rates of population increase are the same counties that are projected to have the highest rates of employment increase. A subsequent section of this report will consider the location of those areas of the state where employment is concentrated and expected to experience the highest rates of growth as compared to the location of those airports that through FDOT’s Aviation Infrastructure Investment Tool have been identified as having a business related service category.
Regional Summaries

Central Florida Region Employment

When the information in Exhibit 2.9.6.2-3 and 2.9.6.2-23 is compared population concentrations and employment concentrations for each of counties within this CFASPP region are similar. Information for population growth rates and employment growth rates in this region are somewhat different. Information in Exhibit 2.9.6.2-4 indicates that counties in this region that are immediately south of the Orlando metropolitan area are projected to have lower rates of population growth than the counties in the southern part of this region. Information in Exhibit 2.9.6.2-4 indicates that Desoto and Highlands counties are expected to have the highest rates of population increase. Exhibit 2.9.6.2-24 shows that De Soto County is expected to have the highest rate of employment growth for the counties in this CFASPP region; this county is also expected to have the highest rate of population growth in this region. While Highland County is expected to have one of the higher rates of population increase (Exhibit 2.9.6.2-4), this county (Exhibit 2.9.6.2-24) is expected to have the region's lowest rate of employment growth.
East Central Florida Metropolitan Area Employment

Exhibit 2.9.6.2-5 showed that population in the counties in this CFASPP region is fairly consistently distributed in terms of its concentration. **Exhibit 2.9.6.2-25** shows that Orange County has the greatest concentration of employment among the counties in this CFASPP region. Exhibit 2.9.6.2-6 indicates that Osceola County is projected to have highest rate of population growth. **Exhibit 2.9.6.2-26** shows that while Osceola County is expected to have one of the highest rates of employment growth in this region, Seminole County is projected to have the highest rate of employment growth in this CFASPP region. Orange and Flagler counties are expected to have the next highest rates of employment growth, following Seminole County. Similar to population growth, Volusia and Brevard counties are expected to have lower rates of increase in employment.
North Central Florida Region Employment

When the information in Exhibit 2.9.6.2-7 and Exhibit 2.9.6.2-27 is compared, it can be seen that population and employment concentrations are very similar. Most of the employment in this CFASPP region is concentrated in Marion and Alachua counties. Similar to population, the next highest levels of employment concentration in this region are in Citrus and Columbia counties.

Rates of employment growth and population growth in this CFASPP region are also similar. When the information in Exhibit 2.9.6.2-8 and Exhibit 2.9.6.2-28 is compared, it can be seen that similar to population growth Gilchrist County is expected to have the highest rate of employment growth. When Exhibit 2.9.6.2-28 is reviewed, it can be seen that the counties in the northernmost portion of this CFASPP are expected to have lower rates of employment increase. This is somewhat consistent with anticipated rates of population increase for the counties in this region.
FLORIDA AVIATION SYSTEM PLAN
2000 Employment Density - North Central Florida Region
Exhibit 2.9.6.2-27

LEGEND
Florida County Employment Density

- Less Than 8,000
- 8,001 - 16,000
- 16,001 - 30,000
- 30,001 - 60,000
- 60,001 - 100,000
- 100,001 - 300,000
- 300,001 - 700,000
- More Than 700,000

System Airport
Interstate
Ocean

0 10 20 30 Miles

Wilbur Smith Associates

FLORIDA AVIATION SYSTEM PLAN
Employment Growth Rate from 2000 to 2030 - North Central Florida Region
Exhibit 2.9.6.2-28

LEGEND
Florida County Employment Growth

- Less Than 25.0%
- 25.1 - 35.0%
- 35.1 - 45.0%
- 45.1 - 55.0%
- 55.1 - 70.0%
- 70.1 - 90.0%
- 90.1 - 115.0%
- More Than 115.0%

System Airport
Interstate
Ocean

0 10 20 30 Miles

Wilbur Smith Associates

Section 2.9.6.2
Northeast Florida Metropolitan Area Employment

**Exhibit 2.9.6.2-29** shows current rates of employment concentration in this CFASPP region. When this information is compared to the population concentration information in Exhibit 2.9.6.2-9, it can be seen that employment and population concentrations are similar. As with population, the majority of this region’s employment is concentrated in Duval County. **Exhibit 2.9.6.2-30** shows that similar to population (Exhibit 2.9.6.2-10) the greatest rate of employment increase is projected to occur in the counties directly south of the Jacksonville metropolitan area. As can be seen, Clay County is projected to have the highest rate of employment growth, followed by St. Johns County. This pattern of employment growth follows the expected population growth rates for this CFASPP region.
Northwest Florida Region Employment

Exhibit 2.9.6.2-11 showed current concentrations of population in this CFASPP region. Exhibit 2.9.6.2-31 shows that employment concentrations follow the same patterns. Those counties that have the highest concentrations of population in this region also have the highest concentrations in employment. When the information in Exhibit 2.9.6.2-32 and Exhibit 2.9.6.2-12 is compared, it can be seen that there are some variations in the counties that are projected to have the highest rates of population increase versus those that are projected to have the highest rates of employment increase. However, the highest rate of employment growth and the highest rate of population growth in this CFASPP region are expected to occur in Walton County. While Franklin County is not expected to have a notable rate of population growth, the rate employment growth in this county is expected to be higher than other counties.
Southeast Florida Metropolitan Area Employment

Population concentrations for this region (previously reflected on Exhibit 2.9.6.2-13) are similar to its employment concentrations (Exhibit 2.9.6.2-33). Projected rates of population growth and employment growth are also similar for the counties in this CFASPP region. Exhibit 2.9.6.2-14 showed that the rate of population growth in Palm Beach and Broward counties is expected to be the highest in this region. Exhibit 2.9.6.2-34 shows that the rate of employment increase in this CFASPP region is expected to be the highest in Palm Beach and Broward counties. The rate of employment growth in these counties, however, is not the highest anticipated in the state. These counties, however, have some of Florida’s highest levels of existing employment concentrations.
Southwest Florida Region Employment

Exhibit 2.9.6.2-35 and Exhibit 2.9.6.2-15 compare data for this CFASPP region on current concentrations of employment and population. As reflected in these two exhibits, those counties in this part of Florida that have the highest levels of employment concentration are the same as those that have the highest levels of population concentration.

Exhibit 2.9.6.2-36 reflects those counties in this CFASPP region that are expected to have the highest rates of increase in employment. Information shown in this exhibit indicates that several of the counties in this CFASPP region are projected to have Florida’s highest rates of employment increase. Those counties that are expected to have the highest rates of employment increase are somewhat similar to the counties in this CFASPP region expected to have the highest rates of population increase. Exhibit 2.9.6.2-16 previously depicted those counties in this region expected to have the highest rates of population increase. When this information is compared to the employment growth rate information shown in Exhibit 2.9.6.2-36, Glades County and Collier County are each expected to have the highest rates of employment growth.
Treasure Coast Region Employment

**Exhibit 2.9.6.2-37** shows current employment concentrations in this CFASPP region. Population and employment concentrations in this region are somewhat similar. Population concentrations for this region were previously shown in Exhibit 2.9.6.2-17. While St. Lucie is this region’s most densely populated county, as shown in Exhibit 2.9.6.2-37, St. Lucie and Martin counties have equal levels of employment concentration.

**Exhibit 2.9.6.2-38** reflects projected rates of employment growth for the counties in this CFASPP region. Similar to projected rates of growth for population in this region (Exhibit 2.9.6.2-18), Martin County is expected to have the highest rate of employment growth.
FLORIDA AVIATION SYSTEM PLAN
2000 Employment Density - Treasure Coast Region

LEGEND
Florida County Employment Density
- Less Than 8,000
- 8,001 - 16,000
- 16,001 - 30,000
- 30,001 - 60,000
- 60,001 - 100,000
- 100,001 - 300,000
- 300,001 - 700,000
- More Than 700,000

System Airport
Interstate
Ocean

0 5 10 15 Miles

FLORIDA AVIATION SYSTEM PLAN
Employment Growth Rate from 2000 to 2030 - Treasure Coast Region

LEGEND
Florida County Employment Growth
- Less Than 2.5%
- 2.51 - 3.5%
- 3.51 - 4.5%
- 4.51 - 5.5%
- 5.51 - 7.0%
- 7.01 - 9.0%
- 9.01 - 11.5%
- More Than 115.0%

System Airport
Interstate
Ocean

0 5 10 15 Miles
West Central Metropolitan Area Employment

Similar to population, Hillsborough County has one of the state’s highest employment densities. Counties in this CFAPP region generally have employment concentrations that exceed the state average. **Exhibit 2.9.6.2-39** depicts current employment concentrations for the counties in this CFASPP region. Exhibit 2.9.6.2-39 previously presented population concentrations for this region.

**Exhibit 2.9.6.2-40** shows projected rates of employment increase for the counties in this CFASPP region. Future growth trends in employment for this region are expected to be similar to the growth rates for population. Hernando County is expected to have the highest rate of employment growth, followed by Hillsborough and Pasco counties. Within this region, the lowest rate of employment increase is expected in Pinellas County.