A Vision of Future Transit Ridership in Florida

Final Report

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EXECUTIVE SUMMARY

What were some of the most significant changes in demographic trends for Florida between 2000 and 2010? What trends will shape Florida over the next decade and beyond? On behalf of the Florida Department of Transportation (FDOT) Public Transit Office, the Center for Urban Transportation Research (CUTR) at the University of South Florida (USF) conducted the research and analysis presented in this report to investigate these questions and qualitatively analyze potential impacts on transit in Florida. The CUTR study team used 2010 U.S. Census and other data and information to posit how transit usage might be influenced by these trends. For example, might transit use be affected by changing composition between urban and rural parts of the state, or by changing age demographics? Are Florida's cities becoming younger, and are these younger people more likely to use transit? Has the socio-demographic profile of the typical rider changed and how may it change in the future? How can Florida's transit agencies prepare for these changes? This study explores these questions and more.

A wide variety of data resources readily available to the study team were used in this effort, including the following:

- 2000 and 2010 U.S. Census data
- American Community Survey (ACS) data
- Reports summarizing 2001 and 2009 National Household Travel Survey (NHTS) data
- ESRI updated demographics for 2010 (projected to 2015)
- 2012 Florida Statistical Abstract and Bureau of Economic and Business Research (BEBR) data
- National Transit Database (NTD)

Population and Age Trends

Population trends and projections are shown below in Table ES-1, using data from the U.S. Census and BEBR. From 2000 to 2010, Florida grew at a much faster rate than the country as a whole (17.6 percent versus 9.7 percent). While Florida's growth is expected to slow over the next two decades, it is clear from Table ES-1 that Florida is still forecasted to grow at a faster rate than the U.S. overall. Florida's rate of growth is projected to be approximately 12 percent between 2010 and 2020 as well as between 2020 and 2030.

Table ES-1: Population Trends and Projections, U.S. and Florida

Area	2000	2010	2020	2030	Percent Change			
					2000-2010	2010-2020	2020-2030	2000-2020
United States	281,421,906	308,745,538	333,896,000	358,471,000	9.7%	8.2%	7.4%	18.7%
Florida	15,982,378	18,801,310	21,021,600	23,567,000	17.6%	11.8%	12.11%	31.5%

Source: U.S. Census and BEBR

As shown in Figure ES-1 on page 12, from 2000 to 2010, the number of urbanized areas (UZAs) in Florida increased from 28 to 30. Based on the U.S. Census, the proportion of the state's population contained within these urbanized areas increased 22.1 percent between 2000 and 2010, while the total population of the state grew 17.6 percent during this time, indicating that Florida's population is becoming more urban. In 2010, 87 percent of the state's population was contained in the UZAs, compared to 84 percent in 2000. 2017 population projections indicate that more than 89 percent of the population will be contained in the UZAs. Nationally, the 2010 Census indicates that the urban population increased 12.1 percent from 2000, compared to the overall national growth rate of 9.7 percent. Because the UZA boundaries will change in 2020, it is not possible to use Census data to predict UZA populations in 2020. However, by 2020, Florida's population is expected to increase approximately 12 percent, while the U.S. population is projected to increase more than 8 percent. There are slightly fewer zero-car households in Florida in 2010 than in 2000, and the number of people reporting that they use public transportation for a commute has increased slightly, as well. Ridership on Florida's urban fixed-route transit systems has increased by 28 percent from 2000 to 2010. Trends in age demographics clearly show the Florida UZAs continue to age, as does the state population in total, while the number of younger people in the UZAs has declined slightly between 2000 and 2010.

Some key findings based on the analysis of the Florida UZAs include:

- The fastest growing UZAs between 2010 and 2017 are Lady Lake-The Villages (14 percent) and St. Augustine (12 percent).
- The fastest aging UZAs between 2000 and 2017 are Lady Lake-The Villages, Fort Walton Beach-Navarre-Wright, Ocala, Panama City, and Tallahassee.
- The UZAs with the largest share of those aged 65 and over in 2017 are Lady Lake-The Villages (57 percent), Sebring-Avon Park (36 percent), Homosassa Springs-Beverly Hills-Citrus Springs (36 percent), and Bonita Springs-Naples (35 percent).
- UZAs with the fastest growth in those aged 18 to 34 from 2000 to 2017 include Zephyrhills, Titusville, North Port-Port Charlotte, Cape Coral, and Spring Hill.
- The UZAs with the largest share of those aged 18 to 34 in 2017 include Gainesville (44 percent), Tallahassee (39 percent), Orlando (26 percent), and Pensacola (25 percent).

According to the U.S. Census Bureau, Florida contains one Metropolitan Statistical Area (MSA) that is part of the top ten most populous MSAs in the U.S. The Miami-Fort-Lauderdale-Pompano Beach MSA is the eighth most populous MSA, and it grew 11 percent between 2000 and 2010. Further, two Florida MSAs are represented in the top ten fastest-growing MSAs. The Palm Coast MSA, located between Jacksonville and Daytona, is the fastest growing MSA with a growth rate of 92 percent between 2000 and 2010. The Cape Coral-Fort Myers MSA is the fifth fastest-growing MSA, having increased more than 40 percent in population between 2000 and 2010.

Miami-Dade County is also represented among the top ten most populous counties, ranking eighth with an 11 percent growth between 2000 and 2010. Flagler County is the third fastest-growing county in the U.S., having grown 92 percent between 2000 and 2010. Sumter County is eighth on the list of the ten fastest-growing counties with a 75 percent increase in population from 2000 to 2010. It should be noted that, while Florida experienced high rates of growth between 2000 and 2010, there is evidence from population projections that the growth rates in the state are slowing down.

Figures ES-2 and ES-3 provide age distribution trends and projections for both the U.S. and Florida. Data are from the U.S. Census and BEBR. For both the U.S. and Florida, the cohort groups for those aged 35 and over are the same; however, data for the younger cohorts are grouped by those under 20 and those aged 20 to 34 for the U.S., and those under 18 and those aged 18 to 34 for Florida. These younger cohorts are of particular interest because they comprise a generation known as the Millennials (or Generation Y). According to most definitions, Millennials were born between 1980 and 2000, although those born in the late 1970s and early 2000s are also generally considered to be Millennials.

It is anticipated that the travel choices and other characteristics of the Millennials will have a significant impact on transportation and transit use in the coming years. At the other end of the distribution, the large numbers of Baby Boomers (those born from 1946 to 1964) are also expected to strongly influence travel patterns and behavior as they continue to age.

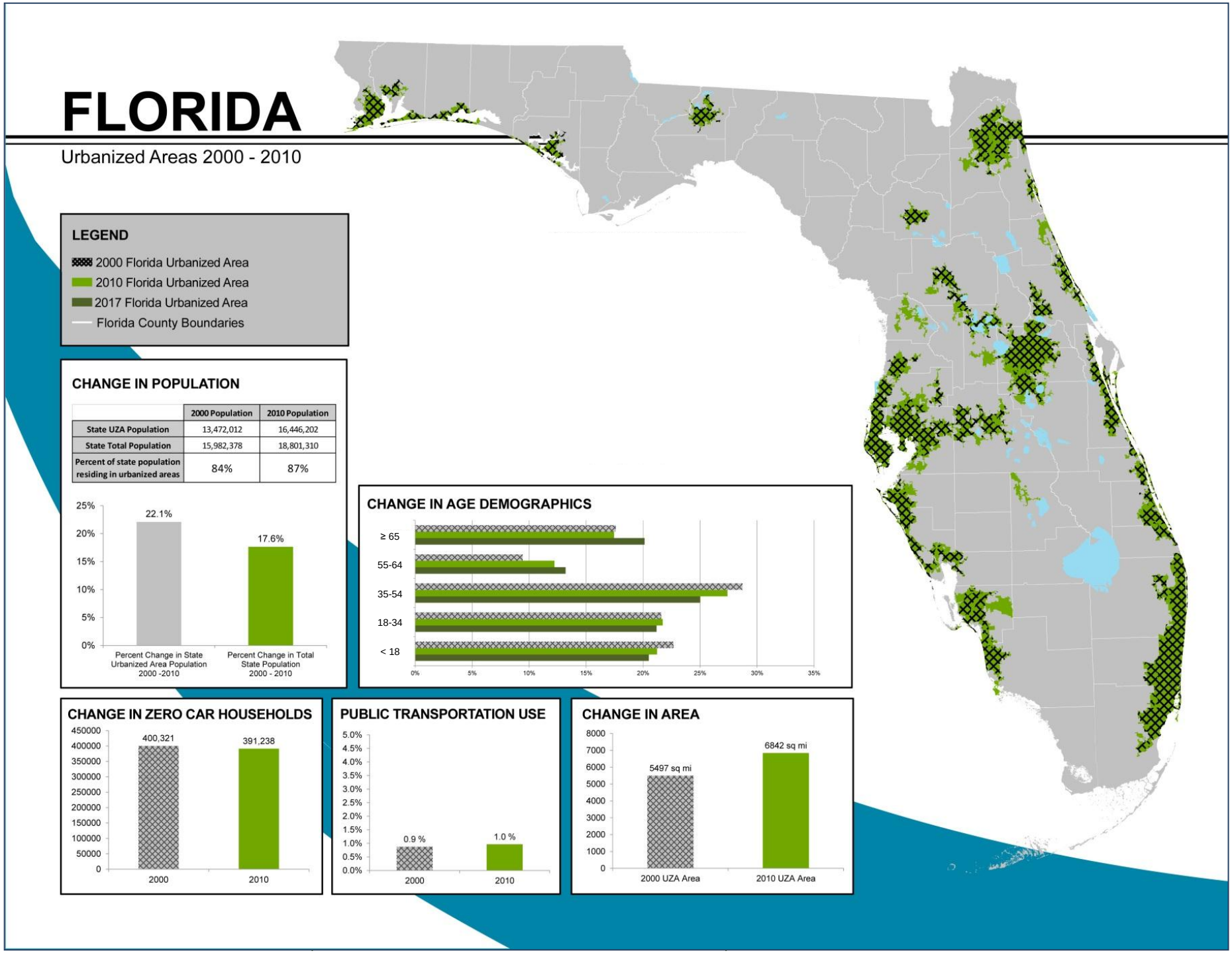
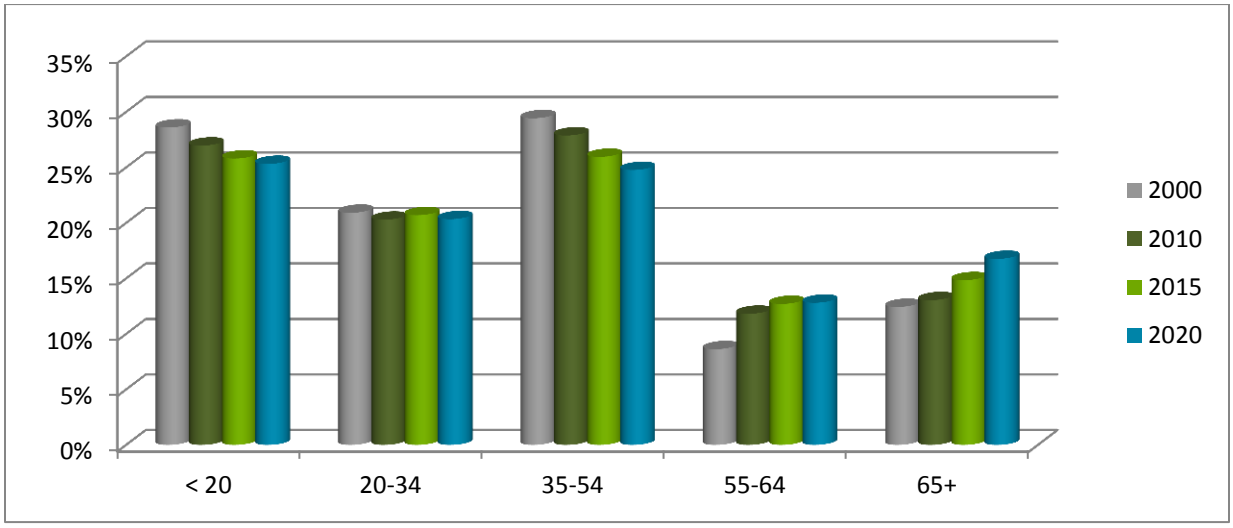


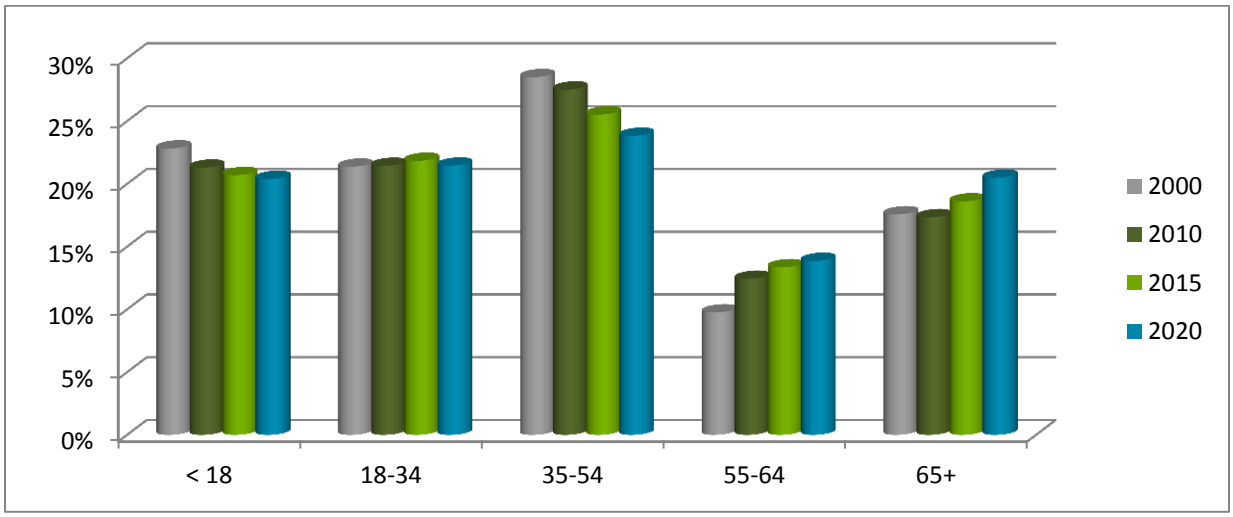
Figure ES-1: Florida Urbanized Areas, 2000 – 2010

Both Figures ES-2 and ES-3 show that those aged 18 to 34 or 20 to 34 will be holding relatively steady as a percent of the overall population between now and 2020. Florida has just slightly higher rates of this generation than the U.S. as a whole. For both the U.S. and Florida, the percentage of those aged 65 and older will significantly increase through 2015 and 2020. As is likely expected, Florida has a much higher percentage of those aged 65 and above than the nation in total. Over the next two decades, the group of those between 35 and 54 years of age will experience the most significant declines as a percent of the total population, for both Florida and the U.S.



Source: U.S. Census and BEBR

Figure ES-2: Age Distribution Trends and Projections for the U.S.



Source: U.S. Census and BEBR

Figure ES-3: Age Distribution Trends and Projections for Florida

Transit Trends

The American Public Transportation Association (APTA) continues to tout public transportation as an essential part of U.S. energy policy, as 70 percent of U.S. oil consumption is accounted for by the transportation sector. APTA has urged investments in balanced and energy-efficient transportation systems and has also advocated for communities to work toward whatever modes of transit will realize their respective visions.

Unfortunately, the nation's transit systems face a backlog of maintenance and infrastructure repair that totaled nearly $80 billion as of 2012. This backlog threatens both existing and new services at the same time that ridership is increasing as people rely more on transit to take them to work and other places.

Table ES-2 presents public transportation statistics for report years 2000 and 2010 for the nation as a whole and for Florida. While transit ridership nationwide has been increasing, ridership in Florida has increased much faster from 2000 to 2010, increasing nearly 28 percent during this time. Florida's population growth was approximately 18 percent during this time, indicating that ridership on Florida's transit systems is growing at a rate much faster than the population of the state. Ridership growth for the country as a whole has increased at about the same rate as population growth between 2000 and 2010, although APTA indicates that, over the past seven years, ridership has increased much faster than population growth and highway VMT. Revenue miles of service have grown at similar rates for Florida and the U.S. during this time, at 37 percent and 34 percent, respectively. Interestingly, the rate of growth for the average fare in Florida (32 percent) is the same as that for all U.S. agencies between 2000 and 2010. During this time, Florida's average fare grew from $0.68 to $0.90, while the average fare in the U.S. increased from $0.93 to $1.23. Finally, Table ES-2 shows that the number of urban fixed-route providers in Florida increased from 23 in 2000 to 28 in 2010. For the U.S. as a whole, the total numbers of providers was estimated at 6,000 in 2000 and 7,088 in 2010.

Table ES-2: Public Transportation Statistics for Florida and the U.S., 2000 and 2010

Indicator	Florida			United States		
	2000	2010	% Change	2000	2010	% Change
Unlinked Passenger Trips (millions)	191.9	245.2	27.8%	9,400	10,218	8.7%
Population (millions)	16.0	18.8	17.6%	281.4	308.7	9.7%
Revenue Miles (millions)	98.9	135.8	37.3%	3,611.8	4836.6	33.9%
Average Fare	$0.68	$0.90	32.3%	$0.93	$1.23	32.3%
Number of Providers*	23	28	21.7%	6,000	7,088	18.1%

Source: U.S. data are from the 2002 and 2012 editions of the APTA Public Transportation Fact Book. Florida data are from the National Transit Database.
*For Florida, this number represents urban fixed-route systems and for the U.S. it represents an estimate of all providers.

Findings

The purpose of this research effort was to examine some of the most significant changes in demographic trends for Florida between 2000 and 2010 to identify what trends may shape Florida over the next decade and beyond. Several findings emerge from the data, literature, and other information examined as part of this study. There are many key trends emerging at the national level and within Florida that can impact future ridership on the state's transit systems.

- Florida's urban population is increasing relative to the state's total population. Between 2000 and 2010, the population contained within the urbanized areas increased 22.1 percent, while the total population of Florida increased 17.6 percent. In 2010, 87 percent of the state's population was contained in the UZAs, compared to 84 percent in 2000. 2017 population projections indicate that more than 89 percent of the state's population will be contained in the UZAs. By 2020, Florida's population is expected to increase approximately 12 percent, while the U.S. population is projected to increase more than 8 percent. Information in this report found that nationwide trends are favorable toward urban growth. As people are attracted to more urban areas, rents and home prices in those areas will eventually increase, possibly making the suburbs and lesser urban areas more desirable again. It is likely that those cities that can market themselves well to younger people and provide high-skill job growth, cultural amenities, and access to high quality transit (bus rapid transit or appropriate rail modes) can maintain or continue to increase their growth over time, attracting not only younger people, but older people as well.

- Analysis in this report showed that many Florida cities have relatively low numbers of college graduates compared to other growing cities in the U.S. There are also relatively fewer high skill jobs in the state compared to other places in the country. Certainly, part of this is due to the large amount of low skill jobs related to the tourism industry. While tourism is critical to Florida's economy, it will also be critical to Florida's economic future for the state to attract higher skill jobs. Such jobs should attract more college-educated people to the state who will want to locate where these jobs are thus creating a potential market for transit ridership.

- In addition to the above, Florida educates large numbers of students in its many colleges and universities. It might be able to retain more of these young graduates, particularly those who studied in the STEM fields of science, technology, engineering, and mathematics, if more of those jobs were available in the state. As the information presented in the full report shows, these young graduates are driving less and are much more interested in using transit than those in older age groups.

- Clearly, younger people, Millennials in particular, are driving less and are much more interested in using public transit and other alternative modes. There are many reasons

for this, including lifestyle preference and environmental concerns, as well as current economic concerns. Whether or not these trends persist as this generation ages, transit agencies can continue to tap this market of young people by appealing to these preferences. Transit systems that serve urban, mixed use areas that are also walkable can appeal to the Millennials' desire for such amenities. Transit systems can also tout "green" ideas of not needing a personal car, or their use of alternative fuel vehicles, if applicable. Younger people are increasingly willing to take transit, but younger "choice" riders will expect high levels and quality of service. Whether the transit systems in Florida can provide them with the types of services they would like to use remains an unanswered question.

- It is well known that younger people love technology. A survey reviewed for this report even found that Millennials would give up their car before they would give up their cell phones or computers. For every other age group in the survey, the car was deemed the most important and people in those age groups were more willing to part with their cell phones and other technology before their cars! Transit agencies, if they are not already, must continue to use technology and social media in ways to attract and retain young people as customers. The increasing availability of trip planners and real-time information on mobile devices definitely makes using transit easier and more convenient. Additionally, conveniences such as WiFi and bike racks make transit more attractive to the younger, more mobile generations.

- Two of the transit systems in the state, StarMetro in Tallahassee and the Gainesville Regional Transit System, both have ridership dominated by university students. They and other systems in the state that serve college students should market to them in a way that will encourage them to keep riding transit after they graduate. In addition, some of Florida's transit agencies might consider, if they have not already, following the lead of the Southeastern Pennsylvania Transportation Authority (SEPTA) and forming youth advisory councils to advocate and educate young people in the community about public transit. Such councils or groups can certainly be successful in smaller cities, too.

- If Florida's future transit ridership does not include as many younger people as some other places in the country, the state can likely still count on very high numbers of aging Baby Boomers. As one of the reports reviewed for this study stated, "the question is not whether Boomers are ready to take transit; the question is, are transit agencies ready for Boomers!" (1). There is no doubt that future transit ridership in Florida will continue to consist of large percentages of older adults. Many Boomers may prefer to age in place, and might not be as attracted to the typical retirement communities popular with today's older seniors. It is likely that this coming generation of seniors may have some other characteristics that are different from their parents, particularly in the number of women who will have driver's licenses and who will be financially independent. Such characteristics may keep them driving longer. They will also be working longer, whether

by necessity or choice, and they also want to remain active in their communities. Aging Boomers will also require significantly increasing numbers of medical trips. Should these trends persist and if many of the Boomers age in place, particularly in suburban areas, transit agencies will be challenged to provide them with the services they will require to continue working, participate in community events, and, most importantly, have access to medical facilities. To help meet the challenge, agencies should use marketing and outreach efforts to promote the use of fixed-route services as opposed to demand-response service.

- Traditional transit markets include youths, the elderly, low-income populations, those without access to a vehicle, and those who do not drive. These traditional transit markets have historically represented large proportions of transit ridership in Florida. While there is evidence that the state's transit agencies can continue to attract additional non-traditional, or "choice" riders, the demographic and socioeconomic trends examined in this report make it clear that these traditional markets will continue to require services and will continue to comprise a significant portion of the state's transit ridership.

- Data from the 2009 NHTS showed that new immigrants to Florida represent nearly 25 percent of the state's transit market, yet represent only 5 percent of the state's population. Further, additional data show that the total foreign-born individuals' share of the state's population was 13 percent in 1990. That share increased to 17 percent in 2000, and continued to rise to more than 19 percent in 2011 (2). Based on this information, it is anticipated that the number of immigrants to the state will likely continue to grow and, if so, that they will likely continue to represent a sizable share of Florida's transit ridership.

- For the first time in many years, Florida will be implementing a new commuter rail system. SunRail is scheduled to open in spring 2014, providing service to 17 stations along 31 miles between Orlando and DeBary. In studying potential ridership, SunRail plans to attract "choice" riders for the work commute, primarily from the I-4 high technology corridor. In addition, however, it is believed that the service will also attract younger people who do not have (or do not want) cars, those who believe the train will be convenient and save them money, and those who are concerned about the quality of the environment (3) (4). The service is also likely to attract some traditional transit riders including seniors who wish to travel to nearby medical facilities, as well as those traveling to sporting events in Orlando and tourists. To be attractive to potential riders, SunRail will offer comfortable seats with tables for laptops or other materials, WiFi, power outlets, and bike racks, among other amenities (5). Several cities are also planning to provide "Flexbus" services to connect at the SunRail stations for a more streamlined experience for the riders (6). If SunRail is successful at attracting the riders it believes will want to use the service, it can represent a major shift in how transit is

perceived, not just in the SunRail service area, but throughout the state, similar to the effect that the Tri-Rail commuter service (as well as Metrorail in Miami) has had in South Florida.

- With new services such as SunRail and All Aboard Florida, a rail service that is proposed to run between the Space Coast area and Miami, it will be easier for people to travel within the state via transit. Many areas in the state are investigating the benefits of more regionalized service to better serve the needs of travelers, both traditional transit riders and "choice" riders. More regional services, whether rail, bus rapid transit, or commuter bus, can appeal to all transit markets, including tourists.

- Much was written in this report regarding the Millennial generation and their collective desire to live in urban communities, drive less by choice, and take alternative modes such as transit more often. While it remains to be seen whether these trends will continue as the economic outlook improves and as this generation ages, these younger people represent potential choice riders and will expect to have convenient, frequent, attractive transit services with access facilitated by using mobile technologies. Such services will also attract choice riders from other demographic cohorts. Light rail transit, where it is feasible, would likely attract significant choice riders, and some areas in Florida are planning such systems for the future (such as Pinellas County). However, areas that do not wish to make an investment in rail can also attract a significant level of choice riders with the implementation of bus rapid transit (BRT), which has many of the characteristics of light rail systems but with lower costs and more flexibility. Transit agencies in North America that have implemented BRT have had great success in increasing overall ridership including the attraction of choice riders (7).

Increasing urbanization, younger people who are less interested in driving and more interested in walkable communities, and Baby Boomers aging in place represent some of the significant national trends that can strongly influence transit and ridership in the state. These national trends, along with other factors specific to the state, will help to shape the vision of future transit ridership in Florida.

CHAPTER 1: INTRODUCTION

What were some of the most significant changes in demographic trends for Florida between 2000 and 2010? What trends will shape Florida over the next decade and beyond? On behalf of the Florida Department of Transportation (FDOT) Public Transit Office, the Center for Urban Transportation Research (CUTR) at the University of South Florida (USF) conducted the research and analysis presented in this report to investigate these questions and qualitatively analyze potential impacts on transit in Florida. The CUTR study team used 2010 U.S. Census and other data and information to posit how transit usage might be influenced by these trends. For example, might transit use be affected by changing composition between urban and rural parts of the state, or by changing age demographics? Are Florida's cities becoming younger, and are these younger people more likely to use transit? Has the socio-demographic profile of the typical rider changed and how may it change in the future? How can Florida's transit agencies prepare for these changes? This study explores these questions and more.

Data

A wide variety of data resources readily available to the study team were used in this effort, including the following, which are also described briefly in the paragraphs below:

- 2000 and 2010 U.S. Census data
- American Community Survey (ACS) data
- Reports summarizing 2001 and 2009 National Household Travel Survey (NHTS) data
- ESRI updated demographics for 2010 (projected to 2017)
- 2012 Florida Statistical Abstract and other Bureau of Economic and Business Research (BEBR) data
- National Transit Database (NTD)

U.S. Census Data

Mandated by Article 1, Section 2 of the U.S. Constitution, the U.S. Census occurs every 10 years and counts each resident of the country. According to the Census website, the 2010 Census represented the largest participation to date, with approximately 74 percent of households returning their forms via mail. This study makes use of 2000 and 2010 Census data. The 2000 Census was the last during which most households received a short-form questionnaire, while one in six households received a long form to collect additional socioeconomic data. Beginning with the 2010 Census, only short-form questionnaires were provided (collecting data on gender, age, race, ethnicity, relationship, and housing tenure). The additional socioeconomic data are now provided by the American Community Survey, discussed below.

American Community Survey

With the decennial census relying on the short-form questionnaires beginning with the 2010 Census, the additional socioeconomic data previously collected on the long-form questionnaire are now collected by the American Community Survey (ACS). The ACS is conducted annually using a sample of the population and provides a more current snapshot of demographic conditions. The first multiyear estimates were based on ACS data collected from 2005 to 2007. For this study, most ACS data represents estimates based on ACS data collected from 2007 to 2011. It should be noted that the ACS data are aggregated to the county level only.

National Household Travel Survey

The National Household Travel Survey (NHTS) is used mainly to better understand travel behavior and assist transportation planners and policymakers by providing comprehensive data on travel and transportation patterns in the U.S. Data from the NHTS can be used to quantify travel behavior, analyze changes in travel characteristics over time, and analyze demographic characteristics of travelers over time. The NHTS essentially serves as an "inventory of daily travel" in the U.S. The most recent NHTS was conducted in 2009 and updates the 2001 NHTS and previous Nationwide Personal Transportation Surveys (NPTS) from 1995, 1990, 1983, 1977, and 1969. This effort used reports that summarized the 2001 and 2009 NHTS. The 2009 NHTS had a sample size of 150,147 households in the U.S., including 15,884 households in Florida (8).

ESRI Projected Demographics

Due to the challenges of using decennial U.S. Census data in rapidly changing communities, the Environmental Systems Research Institute (ESRI), the manufacturer of ArcGIS products, issues five-year Demographic Data Updates which provide projections of various population and demographic characteristics at the block group level. This study applied the 2017 Demographic Update to project population changes in Florida counties and urbanized areas.

Bureau of Economic and Business Research

The Bureau of Economic and Business Research (BEBR) at the University of Florida produces Florida's official state and local population estimates and projections. In addition, it compiles and publishes a comprehensive collection of demographic and socioeconomic indicators. Since 1967, it has published the annual Florida Statistical Abstract, which presents information on population, housing, employment, income, education, health, and tourism, among other topics, for Florida and its counties and cities.

National Transit Database

The National Transit Database (NTD) was established by the U.S. Congress to be the country's primary source for information and statistics on the transit systems that operate in the U.S. Those agencies receiving grants from the Federal Transit Administration (FTA) under the Urbanized Area Formula Program (§5307) or the Other than Urbanized Area (Rural) Formula Program (§5311) are mandated by statute to report data to the NTD. Currently, more than 660 transit providers in urbanized areas report directly to the NTD via an online reporting system. More than 1,300 additional systems operating in rural areas report to the NTD, either directly or through their state departments of transportation. NTD data are used to apportion more than $5 billion of FTA funds to agencies in urbanized areas. This effort focused on transit provided in the urbanized areas of Florida. As of 2013, 29 Florida urban transit agencies report to the NTD under the 5307 Urbanized Area Program.

Other Data Sources and Literature

In addition, the study team conducted a literature search of documents, articles, reports, data, and other information, including anecdotal information, already available and related to the topic of demographic trends and transit in Florida and nationally. National resources were also used, including the American Public Transportation Association (APTA), Bureau of Transportation Statistics (BTS), Transportation Research Board (TRB), and American Planning Association (APA). Within Florida, the study team had access to recently-completed transit development plans (TDPs), on-board surveys, and other reports and documents that provide insight into this research topic for specific counties/regions in the state or the state as a whole.

Report Organization

This report is organized into five chapters. Appendices at the end of the document provide additional detailed information. This first chapter contains introductory information on the project and the resources used for data and other information. Chapter 2 covers demographic and socioeconomic trends for the U.S. as well as Florida. In addition to presenting these data, Chapter 2 also discusses trends identified in the literature and how they relate to transportation choices including transit use and preferences for alternative modes. Chapter 3 focuses on national trends in transit ridership and service, along with these same trends for Florida and its urban transit systems. Demographic data are more closely examined for urbanized areas and counties in Florida in Chapter 4, along with data specific to the urban transit systems operating in these urbanized areas. Finally, based on the previous chapters, Chapter 5 presents a set of findings that can be used to answer many of the questions posed at the beginning of this chapter, such as: What were some of the most significant changes in demographic trends for Florida between 2000 and 2010? What trends will shape Florida over the next decade and beyond? How can Florida's transit agencies prepare for these changes? Lastly, more detailed data and tables are included in the appendices to this report.

CHAPTER 2: DEMOGRAPHIC AND SOCIOECONOMIC TRENDS

This chapter discusses population trends in the U.S. and Florida. U.S. Census data are presented from 2000 and 2010 along with population and age projections to 2020. Particular attention is paid to two age cohorts that have and will continue to have a significant impact on travel behavior, the Baby Boomers and the Millennials (also known as Generation Y). In addition, other national and state trends are discussed relating to land use, jobs and education, and the overall economy. Appendix A contains an annotated bibliography of the sources used in this chapter and Chapter 3.

Population Trends

Population trends and projections are shown below in Table 1, using data from the U.S. Census and BEBR. From 2000 to 2010, Florida grew at a much faster rate than the country as a whole (17.6 percent versus 9.7 percent). While Florida's growth is expected to slow over the next two decades, it is clear from Table 1 that Florida is still forecasted to grow at a faster rate than the U.S. overall. Florida's rate of growth is projected to be approximately 12 percent between 2010 and 2020 as well as between 2020 and 2030.

Table 1: Population Trends and Projections, U.S. and Florida

Area	2000	2010	2020	2030	Percent Change			
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Source: U.S. Census and BEBR

The analysis in Chapter 4 will further describe that, between 2000 and 2010, the number of urbanized areas (UZAs) in Florida increased from 28 to 30. Based on the U.S. Census, the proportion of the state's population contained within these urbanized areas increased 22.1 percent between 2000 and 2010, while the total population of the state grew 17.6 percent during this time, indicating that Florida's population is becoming more urban. In 2010, 87 percent of the state's population was contained in the UZAs, compared to 84 percent in 2000. Nationally, the 2010 Census indicates that, in 2010, the urban population increased 12.1 percent from 2000, compared to the overall national growth rate of 9.7 percent.

According to the U.S. Census Bureau, Florida contains one Metropolitan Statistical Area (MSA) that is part of the top ten most populous MSAs in the U.S. The Miami-Fort-Lauderdale-Pompano Beach MSA is the eighth most populous MSA, and it grew 11 percent between 2000 and 2010. Further, two Florida MSAs are represented in the top ten fastest-growing MSAs. The Palm Coast MSA, located between

Jacksonville and Daytona, is the fastest growing MSA with a growth rate of 92 percent between 2000 and 2010. The Cape Coral-Fort Myers MSA is the fifth fastest-growing MSA, having increased more than 40 percent in population between 2000 and 2010. Other fast growing MSAs are located in Utah (St. George and Provo-Orem); Las Vegas; Raleigh-Cary, North Carolina; Greeley, Colorado; Austin, Texas; Myrtle Beach, South Carolina; and Bend, Oregon (9).

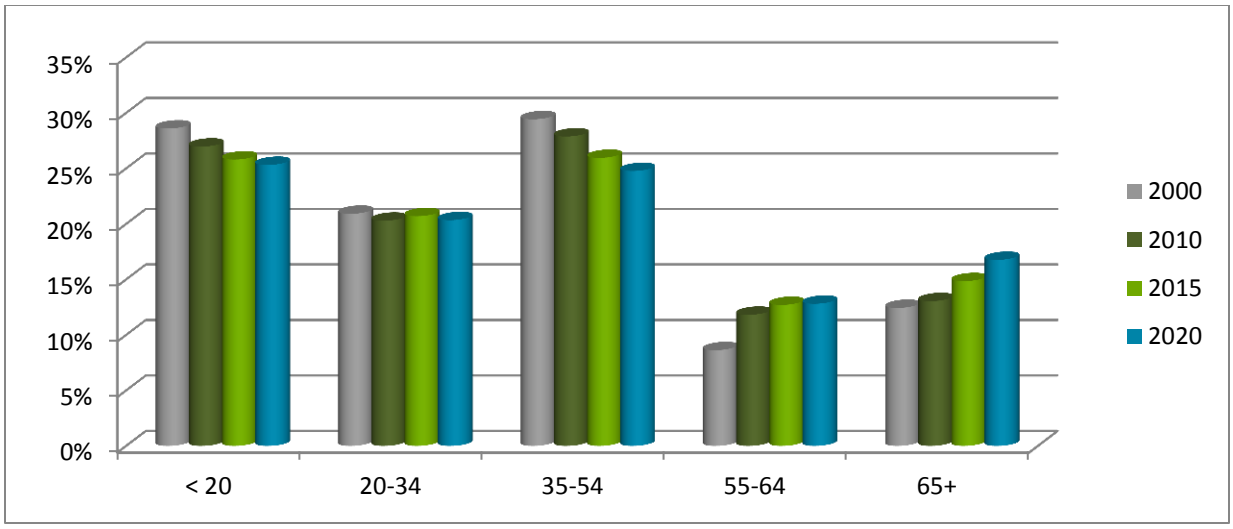
Miami-Dade County is also represented among the top ten most populous counties, again ranking eighth with an 11 percent growth between 2000 and 2010. Flagler County is the third fastest-growing county in the U.S., having grown 92 percent between 2000 and 2010. Sumter County is eighth on the list of the ten fastest-growing counties with a 75 percent increase in population from 2000 to 2010. Other fast-growing counties are located in Illinois, Arizona, South Dakota, Virginia, Texas, and Georgia (9).

More information and analysis is provided about the changes in Florida's counties and UZAs in Chapter 4.

Age Trends

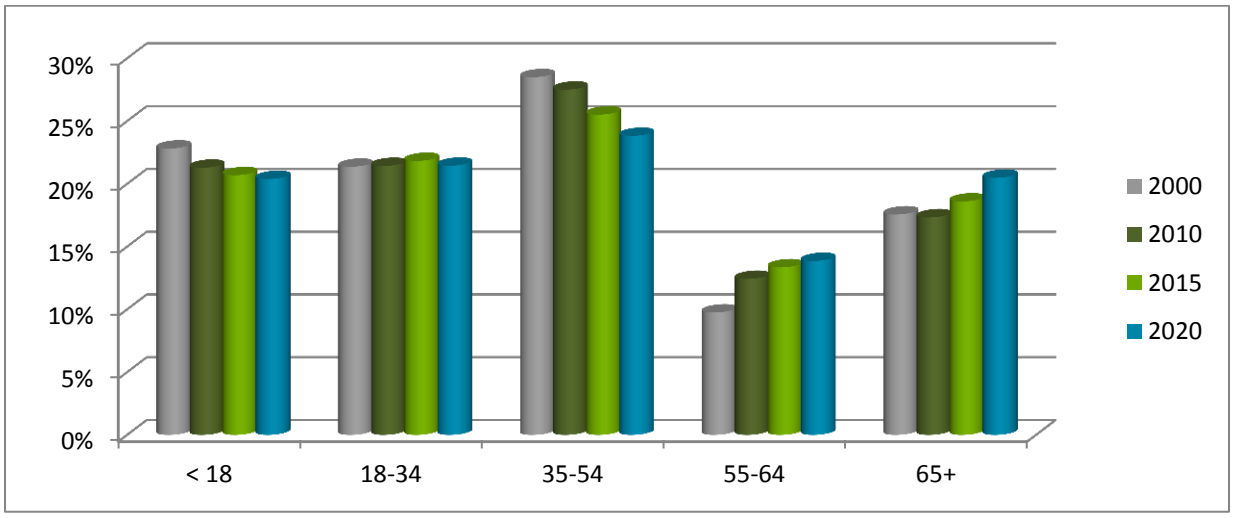
Figures 1 and 2 provide age distribution trends and projections for both the U.S. and Florida. Data are from the U.S. Census and BEBR. For both the U.S. and Florida, the cohort groups for those aged 35 and over are the same; however, data for the younger cohorts are grouped by those under 20 and those aged 20 to 34 for the U.S., and those under 18 and those aged 18 to 34 for Florida. These younger cohorts are of particular interest because they comprise a generation known as the Millennials (or Generation Y). According to most definitions, Millennials were born between 1980 and 2000, although those born in the late 1970s and early 2000s are also generally considered to be Millennials. It is anticipated that the travel choices and other characteristics of the Millennials will have a significant impact on transportation and transit use in the coming years. At the other end of the distribution, the large numbers of Baby Boomers (those born from 1946 to 1964) are also expected to strongly influence travel patterns and behavior as they continue to age.

Both Figures 1 and 2 show that those aged 18 to 34 or 20 to 34 will be holding relatively steady as a percent of the overall population between now and 2020. Florida has just slightly higher rates of this generation than the U.S. as a whole. For both the U.S. and Florida, the percentage of those aged 65 and older will significantly increase through 2015 and 2020. As is likely expected, Florida has a much higher percentage of those aged 65 and above than the nation in total. Over the next two decades, the group of those between 35 and 54 years of age will experience the most significant declines as a percent of the total population, for both Florida and the U.S. Chapter 4 contains additional analysis of age distribution trends for Florida's counties and UZAs.



Source: U.S. Census and BEBR

Figure 1: Age Distribution Trends and Projections for the U.S.



Source: U.S. Census and BEBR

Figure 2: Age Distribution Trends and Projections for Florida

While all areas of the country are aging, analysis of U.S. Census data shows there is a divide between areas that are experiencing gains or losses of younger populations (10). In 28 states, as well as 36 of the 100 largest U.S. metro areas, there was a decline in the population of those aged 45 and younger between 2000 and 2010. However, 29 metro areas experienced at least a 10 percent increase in this same younger population, including Orlando, Florida (as well as Las Vegas, Houston, and Atlanta).

As of 2010, seven states have a median age of 40 and above, including Florida. In general, areas with the highest growth rates of those aged 65 and above are in the Sun Belt, and the highest percentages of older people are mainly in Florida, the Northeast, and Midwest. Further analysis of the 2010 U.S. Census

data indicate that five of the top ten suburbs with the highest percentage of those aged 65 and over are in Florida: Bradenton-Sarasota-Venice (ranked first), Cape Coral-Fort Myers, Palm Bay-Melbourne-Titusville, Tampa-St. Petersburg-Clearwater, and Lakeland-Winter Haven. Similarly, six Florida cities are among the top ten with the highest percentage of those aged 65 and higher: Bradenton-Sarasota-Venice (ranked first), Lakeland-Winter Haven, Cape Coral-Fort Myers, Miami-Fort Lauderdale-Pompano Beach, Palm Bay-Melbourne-Titusville, and Tampa-St. Petersburg-Clearwater (10).

Some areas are gaining younger people. Even though it is listed among the top ten areas with the highest percentage of those age 65 and over, the Cape Coral-Fort Myers area ranks seventh out of the top ten suburban areas with the greatest growth of those under the age of 45. Three Florida cities are included in the top ten primary cities with the greatest growth in those under age 45: Cape Coral-Fort Myers tops the list, with a 47 percent increase in this age category between 2000 and 2010; Orlando-Kissimmee ranks fifth with a 26 percent increase during this time; and Lakeland-Winter Haven (which is also on the list of the top ten areas with the largest percentage of seniors) ranks sixth with a 23 percent increase in the under-45 age group from 2000 to 2010 (10).

Another area in Florida that is getting a bit younger is Broward County, which lost about four percent of its population of those age 65 and over between 2000 and 2010. The adjacent Miami-Dade County saw its share of this older age group grow 17 percent during this time. Two possible explanations are affluent seniors who prefer the Miami area's coveted beach communities, and the influx of Cuban and Caribbean immigrants who are choosing to stay and age in place there (11). Interestingly, Sumter County saw its senior population nearly triple over the past decade, with its population of those aged 65 and over now representing nearly half of the entire county's population. Most of those residents live in The Villages, a development of retirement communities. Actually, most new Villages residents migrate from other cities in Florida. A Villages representative indicated that, just in the last 10 years, 472 new homes in the area were sold to residents coming from Fort Lauderdale in Broward County (11).

As mentioned previously, the two generations expected to have the greatest impacts on travel behavior over the next two decades are the Millennials (age 18 to 34) and the Boomers (age 49 and above). Much has been written about how the Millennials will form their travel patterns and transportation choices as they complete their educations, focus on careers, and consider starting families. On the other end of the distribution, there has also been much emphasis placed on how Boomers will address their changing transportation needs as they wind down careers (though not necessarily retire), become empty-nesters, and deal with the inevitable changes associated with aging.

Baby Boomers

The generation of Boomers began driving at a young age and has generally been more mobile than any generation, before or after (12). The ubiquitous presence of the two-car family and increasing traffic congestion, due in part to the increase in women working and thus commuting alone to work, was shaped by the Boomers. Currently, 8,000 Boomers in the U.S. are turning age 65 every day (13)! In general, data show that people tend to travel the most when they are between the ages of 45 and 55, and travel tapers off after that point. Will Boomers remain more mobile as they age than past

generations? Will they demand more public transportation? It does appear that the older, or "leading edge," Boomers are not much attracted to age-restricted retirement-type communities. They are not necessarily looking to retire early and are also not very interested in "isolating" themselves among other older people (13). Boomers may not retire as early as the previous generation either because they do not have enough savings for retirement or because they are living longer, healthier lives and wish to stay active in their communities. It should also be noted that the federal retirement age for Social Security has also increased, which will results in many people working longer.

Trends in transit use for Boomers do indicate a steady growth in the number of transit trips per person as they continue to age, with a noticeable increase in 2009. The use of transit by those aged 65 and over increased 40 percent between 2001 and 2009 (representing more than 1 billion trips in 2009). This finding is particularly interesting given previous decreases in public transit use among this group (12) (14). It should be noted, however, that public transportation use has increased among all age groups from 2001 to 2009 (14).

One type of trip that is expected to grow significantly in the coming years for Boomers is travel that accesses medical services. Boomers may also be influenced by the current volatility in oil prices and the social issues of U.S. dependence on foreign oil, remembering the oil embargo and gasoline shortages of the 1970s. During that period, many Boomers did turn to alternative transportation modes, and some may again begin to do so for these reasons. There is also evidence that many Boomers who have lived their whole lives in suburbs will prefer to age in place there, thus making access to transportation and medical services, as well as other goods and services, critical. Transportation agencies may face additional challenges as they strive to provide much needed mobility for those choosing to remain in less urbanized areas.

The 2009 National Household Travel Survey (NHTS) indicates that travel by those of all ages has declined from 2001 to 2009, though as older people comprise a larger share of the population, they will also have a larger share of travel. Those age 65 and older took 6 percent fewer trips and traveled approximately 10 percent fewer miles, on average, in 2009 as compared to 2001 (14). Vehicle miles traveled (VMT) for those age 65 and over fell by 7 percent between 2001 and 2009, compared to a decline of 11 percent during that time for all ages (14). It is quite likely that at least a part of these declines is due to increasing gasoline prices and a sluggish economy, which were both prevalent during the 2009 NHTS survey period. A separate survey by the American Association of Retired Persons (AARP) from July 2008 indicated that two-thirds of those aged 50 and over limited daily driving in response to higher gas prices (14).

In general, as one ages, the less one travels outside the home. For those age 65 and over who reported not taking a trip outside their home during the past week, slightly more than half shared that they would prefer to go out more often (14). This finding, about the desire of older people to continue to experience and participate in their communities, represents just one of the many challenges faced by planners, policymakers, and transit agencies as Baby Boomers age.

Millennials

While Baby Boomers began driving young and embraced multi-car households, the younger generation of Millennials, generally age 18 to 34, is actually less likely to drive than their parents. NHTS and other data show that younger people are decreasing the amount they drive and increasing their use of alternative modes of transportation. Some interesting findings regarding the group of those aged 16 to 34, from NHTS and Federal Highway Administration (FHWA) data, include (15):

- VMT decreased 23 percent between 2001 and 2009.
- This group took 24 percent more bike trips in 2009 than in 2001.
- These young people walked to their destinations 16 percent more in 2009 than in 2001.
- Passenger miles traveled on public transportation by this group grew 40 percent between 2001 and 2009.
- Between 2000 and 2010, the share of those age 14 to 34 without a driver's license grew from 21 percent to 26 percent.

Many factors are contributing to the decline in driving by younger people, including higher gas prices, newer licensing laws, technological advances that support use of alternative modes such as public transit (e.g., real-time information and data on mobile devices), and a change in values and preferences related to lifestyle as well as environmental and social concerns. Those studying these trends believe they will persist in the coming years (15).

While the Millennials are poised to become the most educated generation in U.S. history (16), a slow-growing economy is keeping up to 37 percent of all those age 18 to 29 either unemployed or out of the workforce as of 2010, the highest share among this age group in more than 30 years (16). While it is very likely that this percentage of unemployed among this age group has declined in the last two years as the nation's employment situation has begun to improve, the severe recession from 2007 to 2009 has certainly had an effect. The Great Recession (or Great Contraction), as it is sometimes known, was the most severe economic downturn experienced in the U.S. since the 1930s. It was caused primarily by crises in the U.S. financial and housing markets, and the effects are still being felt today with housing prices, employment levels, and economic growth still below pre-recession levels (17). A Pew Research analysis of U.S. households revealed that younger adults lowered their overall debt significantly more than older adults during and immediately after the recession. This was largely achieved by these younger people owning fewer houses and cars, although student loan debt did increase (18). Another survey found that 80 percent of those aged 18 to 34 indicated that high costs of fuel, parking, and maintenance made owning a car "difficult" (19). However, it should be noted that even those with higher incomes are also choosing not to drive as much. The same report, using NHTS data, found that those age 16 to 34 in households with annual incomes higher than $70,000 are driving less and have doubled their public transit use, increased biking by 122 percent, and increased walking trips by 37 percent (19).

Younger people are choosing to drive less and use other modes more as a matter of preference, which sets their generation apart from their elders. Some are doing so for environmental reasons, and some

are simply more interested in living in places that are walkable and have access to high quality public transportation and bicycle facilities (15). A J.D. Power and Associates study found that teenagers and those in their twenties "have increasingly negative perceptions 'regarding the necessity of and desire to have cars'" (19). Indeed, auto manufacturers have been aware of this trend for at least a few years, and it is one reason why the industry is looking abroad primarily to Asia for future growth (20).

Another study estimated that 77 percent of those aged 18 to 35 plan to live in "urban centers" which are more likely to have walkable mixed uses and public transportation (15). The Great Recession slowed interstate population migration significantly, with data showing that fewer people moved across state lines in 2008 than in any other year since 1950, when the population was half of what it is today (21). In addition, between 2009 and 2011, only 9 percent of those aged 29 to 34 were approved for a first-time mortgage, indicating that many of these younger people, dubbed "Generation Rent" in one report, will be renting for a long time (22). So, to the extent they are moving, where do younger people want to live? They are being pragmatic and looking for places to live in cities hurt least in the recent recession and where high-paying jobs tend to be created (21). They are also looking to live in places that have a sort of "coolness" factor, including some college towns and other cities known as high-technology centers. Young and educated Millennials might not mind the smaller living spaces associated with urban living, and they seem to prefer areas where there are many places to gather with their friends and colleagues (22). In Tampa, Florida, the downtown condominium market has been relatively strong as the rest of the area's housing market remains relatively flat. Young professionals (as well as empty-nesters and retirees) have been competing for the area's condos and apartments (23). An analysis of ACS data showed that young people age 25 to 34 moved most to these cities between 2008 and 2010: Denver, Houston, Dallas, Seattle, Austin, Washington, D.C., and Portland. High numbers of people in this age group left Los Angeles, New York, Chicago, Detroit, Miami, San Diego, and Virginia Beach (24). Interestingly, the Florida city of Miami is on this "top losers" list. Although Miami has an excellent transit system, the region itself is decentralized and sprawling. It might be the case that young people are attracted to the opportunities in cities that boast a combination of compact development characteristics and high quality public transit.

Young people, as well as all working age, mobile people, will follow jobs, and so the cities listed above may not persist in attracting young people as the economic recovery continues. A Wall Street Journal report identified the top five next "youth-magnet" cities (21). Four of the five cities are on the "top gainers" list from above: Washington, D.C., Seattle, Portland, and Austin. A fifth, New York, is actually on the "top losers" list above. Some economists and others do not necessarily believe that the trends of "Generation Rent" and the migration of young people to cities will persist, both as they age and as the economy recovers (22). It might be that some young people who prefer the "cool" urban life today may change their minds over time as downtown rents rise and they start to consider having families.

It is certainly not surprising, though, that Millennials prefer to be connected, both socially and technologically. However, it is not just young people; during 2008, the number of devices connected to the internet actually exceeded the number of people on earth (25)! There is some thought that younger people are using technology as a substitute for driving, using Facebook, Twitter, and Skype, etc., as substitutes for making trips to meet with others in person (19). This is also seen in the rise of on-line

shopping and e-commerce, some of which takes the place of driving somewhere to shop, although this impacts people of all ages, not just Millennials. However, some who study these trends believe there is simply not yet enough information to suggest that younger people are replacing trips with technology in any substantial amount (20). Some anecdotal evidence suggests that they use their mobile technology as a way to find places and events to interact with others in person. In essence, younger people use the internet to "connect and engage" with their community and, actually, older people also like feeling connected to their community, although perhaps in different ways (25). However, a survey did show that, out of four types of technology (TV, mobile phone, computer, and car), Millennials would first give up their TVs, and then their cars, before parting with their computers or mobile phones. In contrast, the three older age groups in the survey would rather do without TVs, computers, or mobile phones before giving up their cars (26). So, perhaps these connected young people (and connected people of other ages) might be attracted to transit to travel to places in their community where they can interact with others in person. These findings represent an important cultural shift in how younger people view transportation in general, and cars specifically.

The Millennials' near-constant and proficient use of technology is also important to their travel behavior in other ways, as websites and apps related to the use of public transit and other alternative modes become more popular (15). The fact that people can use their computers or mobile phones to access trip planners, route information, and real-time information makes transit so much easier to use, particularly among those who may not be frequent transit users. In addition, technology facilitates the use of other alternatives such as bike-sharing and car-sharing programs. Embracing cutting-edge trends in social media and other technology will certainly help transit agencies, in Florida and across the U.S., as they seek to attract and retain these potential customers.

Other Trends

Land Uses

A report by the Urban Land Institute (ULI) presents a vision of increasingly compact land uses in the coming years, which will serve to make public transit investments more attractive to local decision-makers as well as potential riders. More compact, mixed land uses that are walkable and also have good transit access will add to property values while also reducing the burden of transportation costs to households still recovering from the Great Recession. Further, while it has been the case that cities have been trying to renew their inner-city urban centers, it is likely that, in the coming years, the challenges of urban redevelopment will be shifting to the suburbs (25).

Indeed, urban living is continuing to gain in popularity. According to the ULI, if a two-car household loses a car, it can save $8,000 to $10,000 per year, which can, among other uses, go toward the purchase of a home. This is important because, as discussed previously, lending standards remain tight (see discussion above regarding "Generation Rent") (25) (22). In Florida, counties outside of the Tampa-St. Petersburg-Clearwater area, such as Pasco, Hernando, Citrus, Polk, and Manatee, have leveraged their proximity to the urban areas of Hillsborough and Pinellas Counties, touting their lower costs (for both residents and businesses) and less hectic lifestyles (27). It will be interesting to see what happens

in those counties if people begin to prefer the relatively larger and more urbanized cities. Indeed, U.S. Census data show that the annual growth rate of U.S. cities and surrounding urban areas is now higher than that of the exurbs for the first time in two decades (27).

Jobs and Education

In the U.S. as a whole, we are less educated than we need to be in order to qualify for the high-tech, high-skill jobs that are needed to secure economic growth. However, this is particularly apparent in Florida, where 26 percent of the population has a bachelor's degree or higher as of 2010, compared to 28 percent for the U.S. as a whole. In Florida, only 21.6 percent of men age 25 to 34 have a college degree, which is only partly explained by the fact that men are now less likely to complete college than women. One study found that each additional worker with a college degree (instead of just a high school diploma) increases an urban area's output by approximately $100,000 per year (28). It seems that areas that have a large number of college-educated workers will also attract additional college-educated workers, and businesses also choose locations with higher numbers of college graduates.

Many metro areas in Florida rank quite low in the numbers of college educated residents. As of 2010, the top five metro areas in the U.S. with the highest number of college graduates were: Washington, D.C. (46.8 percent); San Jose, California (45.3 percent); Bridgeport-Stamford, Connecticut (44.0 percent); San Francisco, California (43.4 percent); and Madison, Wisconsin (43.3 percent). The highest ranking Florida metro areas are Miami-Fort Lauderdale and Orlando-Kissimmee with 28.1 percent, tied for 61st place. Jacksonville and Sarasota-Bradenton are tied for 68th place with 26.9 percent, and the Tampa Bay area is 75th with 26.2 percent. The Lakeland-Winter Haven metro area ranks among the five lowest nationally, at 96th place with 17.9 percent of its residents holding college degrees (29).

Florida generally has more lower skill jobs relative to higher skill jobs, which is partly due to the state's reliance on the tourism industry. Tourism is clearly an essential part of the Florida economy, and the levels of visitors and tourists can impact policies relating to transportation infrastructure and service investments. The yearly number of visits to the state by non-state residents grew from an estimated 73.9 million in 2002 to an estimated 87.3 million in 2011 (30) (31). Further analysis shows that, between 2001 and 2008, Florida lost high skill jobs and gained low skill jobs, relative to the nation as a whole (32). However, counter to this trend, the Governor and other leaders in the state are currently rallying to bring high technology industry and manufacturing to Florida which, if successful, will create high skill jobs and attract the skilled labor to fill them.

The Economy

Florida, along with the rest of the country, is still trying to recover from the Great Recession. During the 1990s, per capita income in Florida was steadily declining relative to the U.S. The decline was briefly interrupted by the housing boom in the 2000s. However, by 2011, Florida's per capita income was lower than it was even in the 1970s (33). In 2010, Florida's gross domestic product (GDP) was fourth-highest in the nation at $748 billion, but this masks the relatively low per-capita income of $39,000 that

year, which ranked 27th of all the states and further underscores that Florida is a populous state with a high amount of low wage jobs (29).

The Bureau of Economic and Business Research (BEBR) at the University of Florida has done some research on Florida's economic conditions emerging from the Great Recession. An analysis compared Florida with other states where the housing bubble had a significant impact, such as California, Nevada, and Arizona. BEBR found that, in 2010, Florida's employment growth relative to the population was slightly higher than California, Nevada, the U.S. as a whole, and much higher than Arizona (33). However, during the same time, Florida's real GDP per capita continued to decline. That the number of jobs grew faster than GDP during this time also implies that Florida's productivity declined in absolute terms (33).

Nationwide, public sector budget issues are contributing to delays in repairing and rebuilding critical infrastructure, as well as investments in new infrastructure. However, it is just these types of investments, as well as investments in education, that Florida needs to make to produce "dynamic, productive, and attractive cities" that will attract high skill jobs and thus high skill workers, which can reverse the trend of declining real income per capita (25) (33). Many experts believe it will take a true sense of regional cooperation throughout the state to make it happen (34).

CHAPTER 3: TRANSIT TRENDS

This chapter focuses on U.S. and Florida trends in transit services and ridership. Sections contained in Chapter 3 describe the transit industry's emergence from the Great Recession, its goals and ridership statistics, and some data and other information relating to various transit markets. Appendix A contains an annotated bibliography of the sources used in this chapter (as well as in Chapter 2).

Impacts of the Economy

The American Public Transportation Association (APTA) continues to tout public transportation as an essential part of U.S. energy policy, as 70 percent of U.S. oil consumption is accounted for by the transportation sector (35). APTA has urged investments in balanced and energy-efficient transportation systems and has also advocated for communities to work toward whatever modes of transit will realize their respective visions (35) (36).

Unfortunately, the nation's transit systems face a backlog of maintenance and infrastructure repair that totaled nearly $80 billion as of 2012 (37). This backlog threatens both existing and new services at the same time that ridership is increasing as people rely more and more on transit to take them to work and other places. Peter Rogoff, Administrator of the Federal Transit Administration (FTA) stated in April 2012 that, "If we want the American public to be able to have a choice to avoid higher gas prices by using transit, then the transit service needs to be reliable and desirable." (37).

APTA has conducted two surveys of transit agencies in the aftermath of the recent recession to assess how these agencies are dealing with the budgetary challenges. The most recent was conducted in 2011 and asked about actions that agencies have taken since the beginning of 2010 in response to the state of the economy. A total of 117 agencies responded to the survey, and some key findings are listed below (38):

- 71 percent of the agencies experienced flat or declining local funding, while 83 percent experienced flat or decreasing state funding.
- 85 percent of agencies indicated flat or declining capital funding.
- Approximately 80 percent of responding agencies have cut service or increased fares, or are considering these actions. Half of the agencies have already cut service or increased fares.
- Larger transit agencies were more impacted by the economic conditions and were more likely to have cut service or increased fares than other agencies.
- Larger agencies were more likely than other agencies to reduce the size of their workforces.

Ridership and Service

Ridership on the nation's transit systems continues to increase. Transit agencies in the U.S. reported to APTA that they provided more than 7.9 billion trips in the first three quarters of 2012, which represents 201 million more than over the same period in 2011 (39). During the first three quarters of 2012, all major public transportation modes experienced ridership growth, with light rail and heavy rail showing

the largest increases (4.2 percent and 3.6 percent, respectively). Bus ridership increased 1.8 percent and demand-response ridership grew 3.6 percent during this time period (39).

Table 2 presents public transportation statistics for report years 2000 and 2010 for the nation as a whole and for Florida. While transit ridership nationwide has been increasing, ridership in Florida has increased much faster from 2000 to 2010, increasing nearly 28 percent during this time. Florida's population growth was approximately 18 percent during this time, indicating that ridership on Florida's transit systems is growing at a rate much faster than the population of the state. Ridership growth for the country as a whole has increased at about the same rate as population growth between 2000 and 2010, although APTA indicates that, over the past seven years, ridership has increased much faster than population growth and highway VMT (40). Revenue miles of service have grown at similar rates for Florida and the U.S. during this time, at 37 percent and 34 percent, respectively. Interestingly, the rate of growth for the average fare in Florida (32 percent) is the same as that for all U.S. agencies between 2000 and 2010. During this time, Florida's average fare grew from $0.68 to $0.90, while the average fare in the U.S. increased from $0.93 to $1.23. Finally, Table 2 shows that the number of urban fixed-route providers in Florida increased from 23 in 2000 to 28 in 2010. For the U.S. as a whole, the total numbers of providers was estimated at 6,000 in 2000 and 7,088 in 2010. Additional data for each of Florida's urban fixed-route transit systems is provided in Appendix B.

Table 2: Public Transportation Statistics for Florida and the U.S., 2000 and 2010

Indicator	Florida			United States		
	2000	2010	% Change	2000	2010	% Change
Unlinked Passenger Trips (millions)	191.9	245.2	27.8%	9,400	10,218	8.7%
Population (millions)	16.0	18.8	17.6%	281.4	308.7	9.7%
Revenue Miles (millions)	98.9	135.8	37.3%	3,611.8	4836.6	33.9%
Average Fare	$0.68	$0.90	32.3%	$0.93	$1.23	32.3%
Number of Providers*	23	28	21.7%	6,000	7,088	18.1%

Source: U.S. data are from the 2002 and 2012 editions of the APTA Public Transportation Fact Book. Florida data are from the National Transit Database.
*For Florida, this number represents urban fixed-route systems and for the U.S. it represents an estimate of all providers.

In 2000, Miami-Dade Transit ranked 16th among the largest 35 transit agencies in terms of ridership. In 2010, Miami-Dade Transit ranked 17th among the top 50 agencies, which also include Broward County Transit (ranked 38th) and Lynx Transit (ranked 49th) (40) (41).

APTA has made attempts to use on-board survey data from transit agencies across the country to determine a ridership profile. It is difficult to make comparisons from the APTA report from 2007 (*A*

Profile of Public Transportation Passenger Demographics and Travel Characteristics Reported in On-Board Surveys) and data reported in the *2002 APTA Public Transportation Fact Book*, which provides data from 2000. However, in both 2000 and 2007, APTA reported that approximately seven percent of trips are taken by older riders. Regarding household income, the 2000 information shows that 27 percent of trips were taken by those with incomes below $15,000, while the 2007 APTA profile indicates that 20 percent were taken by those with incomes below $15,000. In addition, in 2000, 17 percent of trips were taken by those with incomes greater than $50,000, while the 2007 APTA profile reports that 34 percent were taken by those with incomes above $50,000, thus indicating a significant increase in choice (non-transit dependent) riders (41) (42).

Notably, some other important changes that have occurred in the transit industry over the past decade have included the application of conveniences and new technologies such as real-time data. Ten years ago, just one in five transit buses was equipped with automatic vehicle location (AVL) systems. Currently, more than three in five transit buses have AVL equipment. Further, the percentage of transit buses with bike racks has grown from 32 percent in 2001 to 74 percent in 2011 (40).

Market Information

A recent report from the National Center for Transit Research (NCTR) has examined public transportation markets using NHTS data. The study focused on six socio-demographic characteristics (driver status, immigration status, existence of medical conditions, household income, vehicle availability, and race and ethnicity) and two travel characteristics (monthly frequency of transit use and person-trip purpose). Some of the key findings from that study relate to this effort and are summarized below (8):

- Zero-vehicle households, which represent 6.1 of the total U.S. population, comprise the largest transit market by capturing approximately 49 percent of the total U.S. transit market.
- Nearly 19 percent of the U.S. population uses transit in an average month.
- Both those in zero-vehicle households and the most frequent transit users rely on transit for more than 25 percent of their daily travel needs.
- A third of most transit markets consider access and availability of transit to be their most important issue
- The percent of transit trips taken for the purpose of work varies substantially among transit markets: 10 percent among non-drivers, 12 percent among those using transit 1-9 times per month, and 56 percent among those with annual household incomes of $100,000 or more.
- In Florida, new immigrants represent 23 percent of the transit market in the state, while they represent only 5 percent of the state's population.
- Households with annual household incomes below $15,000 comprise 42 percent of the transit market in Florida, yet only 29 percent of the U.S. market.
- New immigrants (arrived from 2000 to 2009) represent 23 percent of all transit trips in Florida and only 8 percent in the U.S.

- The percent of transit trips for work purposes is 27 percent in Florida compared to 36 percent for the U.S.

Overall, there are several signs that markets for transit are growing in the U.S. These include population growth and demographic changes, particularly among the Baby Boomers and Millennials, as discussed in Chapter 2. An unfortunate sign is the growing poverty rates in the U.S., increasing to approximately 15 percent of the population in 2010. This has significant impacts to transit, specifically in Florida as 42 percent of the ridership is low income. In addition, effects from the Great Recession have tempered many consumers' spending habits, and this might be seen in the very high growth of alternatives to owning a car such as car-sharing programs. Finally, more and more people are "going green" and making transportation and other choices with environmental concerns in mind (1). These trends can paint a favorable picture for transit use in the coming years.

Finally, with the likely impact of the Millennials on current and future transit use (see Chapter 2), it is in the best interests of transit agencies to actively market to young people to attract and retain them as customers for years into the future. Many cities have youth advisory boards that are made up of young people in the community, sometimes as young as 12 years old, to provide input to decision-makers on a variety of topics of local concern. In September 2009, the Southeastern Pennsylvania Transportation Authority (SEPTA) founded its Youth Advisory Council (YAC), a first of its kind in the U.S. The 17-member council, comprised of high school and college students, meets regularly and provides a significant level of input into local transportation issues and focuses on outreach, communications, and service evaluation (43). The YAC has worked with local university administrators to ensure students know how to use the SEPTA services. The YAC provides a way for SEPTA to really tap into the growing demographic of young transit users, with the idea that they will remain transit users as they get older. Other transit agencies have contacted SEPTA and its YAC so that they might form their own similar councils (43). Florida agencies should consider this, as well, if they are not already doing so.

CHAPTER 4: FLORIDA'S URBANIZED AREAS

Chapter 4 more closely examines Florida's Urbanized Areas (UZAs) and counties to identify relevant demographic trends. In addition, some select information about the transit agencies that operate in Florida is also included. This chapter is organized by Florida Department of Transportation (FDOT) District, and begins with the presentation of Figure 3, which shows all of the urbanized areas in Florida and how they have changed between 2000 and 2010 in terms of population, size, and age distributions. In addition, UZA population and age distributions are projected for 2017. This same information is presented for each of the Florida UZAs, as well as for the counties associated with the UZAs.

The methodology used to produce the maps and data is briefly described in this chapter; however, a detailed description is available in Appendix C, and additional data tables are presented in Appendix D. The research team utilized multiple U.S. Census data and geographic products to represent the demographic and geographic population trends. To illustrate and calculate the demographic trends within Florida in the past decade, two separate types of data were utilized, historical Census data and population projections available from commercial vendors. The historical census data, representing 2000 and 2010, relied solely on the U.S. Census Summary File 1 (100 percent count) data files to reflect the population and age distribution for the State of Florida and each of its urbanized area boundaries. The 2017 population projections based on 2010 Census Block Group boundaries were acquired from the Environmental Systems Research Institute (ESRI). The historical Census data document and accurately reflect the population characteristics of Florida's urbanized areas. However, the projected data provided by ESRI represented a challenge for the research team due to the 2017 projections being applied to the 2010 UZA boundaries (the UZA boundaries will be updated with the 2020 Census).

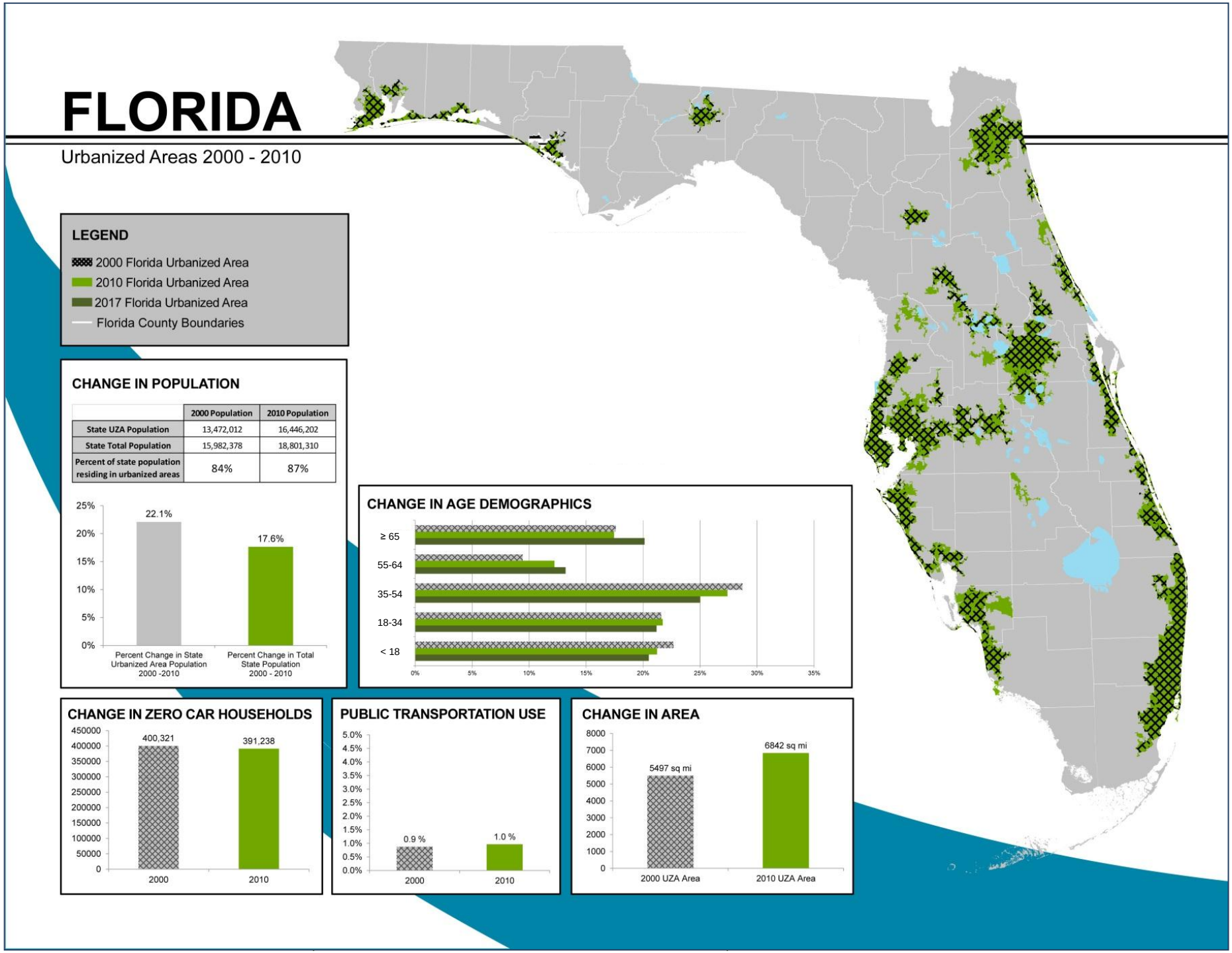


Figure 3: Florida Urbanized Areas, 2000 – 2010

As shown in Figure 3, from 2000 to 2010, the number of urbanized areas (UZAs) in Florida increased from 28 to 30. Based on the U.S. Census, the proportion of the state's population contained within these urbanized areas increased 22.1 percent between 2000 and 2010, while the total population of the state grew 17.6 percent during this time, indicating that Florida's population is becoming more urban. In 2010, 87 percent of the state's population was contained in the UZAs, compared to 84 percent in 2000. 2017 population projections indicate that more than 89 percent of the population will be contained in the UZAs. Nationally, the 2010 Census indicates that the urban population increased 12.1 percent from 2000, compared to the overall national growth rate of 9.7 percent. Because the UZA boundaries will change in 2020, it is not possible to use Census data to predict UZA populations in 2020. However, by 2020, Florida's population is expected to increase approximately 12 percent, while the U.S. population is projected to increase more than 8 percent. There are slightly fewer zero-car households in Florida in 2010 than in 2000, and the number of people reporting that they use public transportation for a commute has increased slightly, as well. Ridership on Florida's urban fixed-route transit systems has increased by 28 percent from 2000 to 2010. Trends in age demographics clearly show the Florida UZAs continue to age, as does the state population in total, while the number of younger people in the UZAs has declined slightly between 2000 and 2010.

FDOT District One

Figures 4 through 10 illustrate the UZAs associated with counties and transit agencies contained within FDOT's District One. Additional graphics and narrative follow the maps in the figures.

FDOT District One contains the following UZAs:

- Bonita Springs (Collier and Lee Counties)
- Cape Coral (Lee County)
- Lakeland (Polk County)
- North Port-Port Charlotte (Charlotte, Sarasota, and DeSoto Counties)
- Sarasota-Bradenton (Sarasota and Manatee Counties)
- Sebring-Avon Park (Highlands County)
- Winter Haven (Polk County)

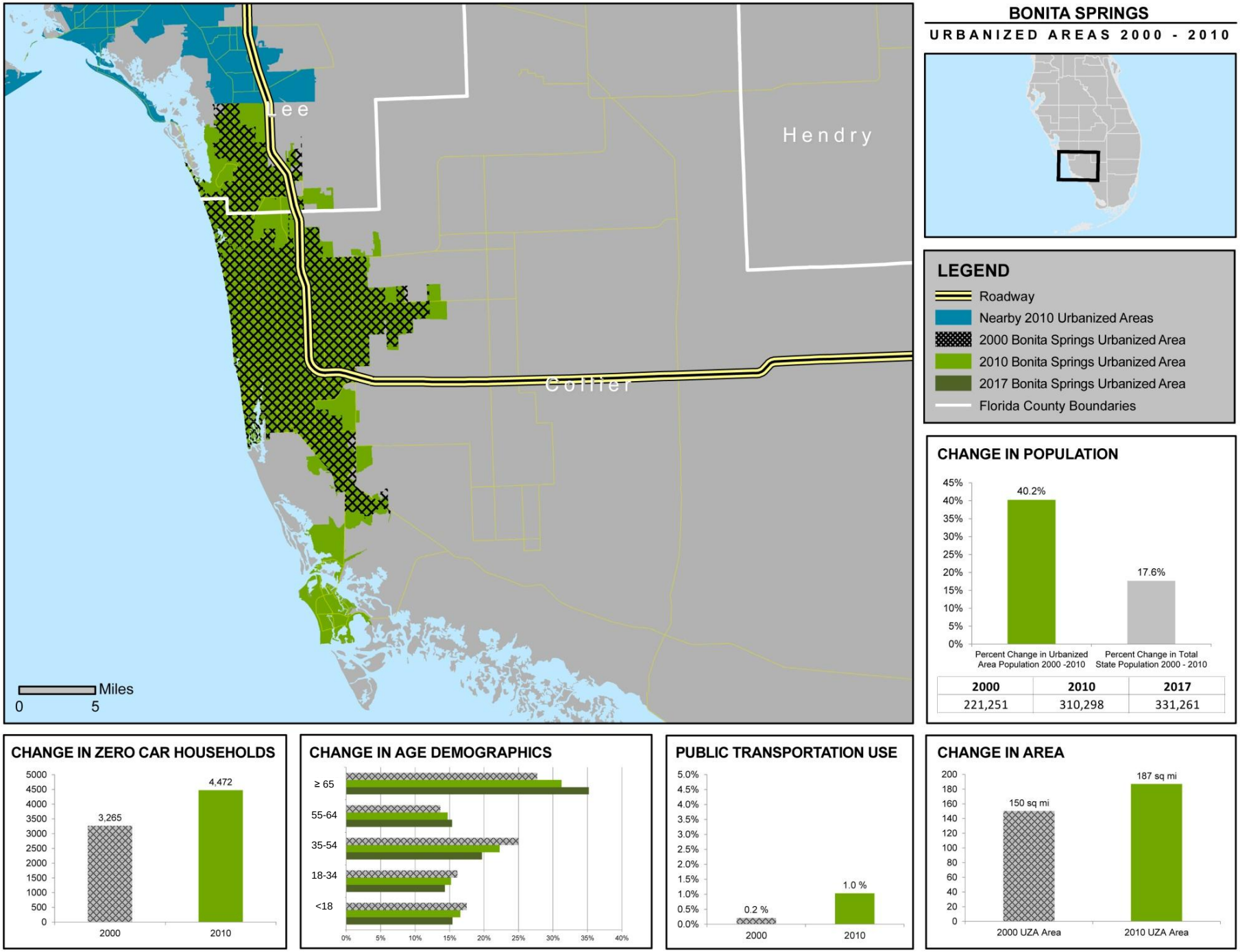


Figure 4: Bonita Springs Urbanized Area, 2000 – 2010

As shown in Figure 4 on the previous page, the Bonita Springs UZA is primarily located in Collier County. The map illustrates that, between 2000 and 2010, the UZA population increased 40.2 percent, and its area increased from 150 square miles to 187 square miles. By 2017, the population is expected to increase an additional seven percent to 331,261. The UZA population is aging, and there was an increase in the number of zero-car households and the number of people reporting that they use public transportation for a commute during this time. Collier Area Transit began operating in February 2001.

The Cape Coral UZA is illustrated in Figure 5 on the following page. The map in the figure shows how the area of the UZA increased significantly between 2000 and 2010, and the UZA population increased nearly 61 percent (compared to 18 percent for the state as a whole). As mentioned in Chapter 2, the Cape Coral-Fort Myers MSA was the fifth fastest growing MSA between 2000 and 2010. 2017 population projections indicate that the UZA will grow six percent to 562,830.

During this time, zero-car households and the number of people reporting that they use public transportation for a commute have increased in the UZA, according to Figure 5. Between 2000 and 2010, the proportion of younger people in the UZA increased while the proportion of older people decreased; however, this trend appears to be reversing according to the 2017 projections (see also Figure 15 on page 53 which shows the age distributions for Lee County). In Chapter 2, it was noted that, while the Cape Coral MSA was among the top ten areas with the highest percentage of those 65 and over, it also was among the top ten areas with the greatest growth of those under the age of 45 between 2000 and 2010 (10).

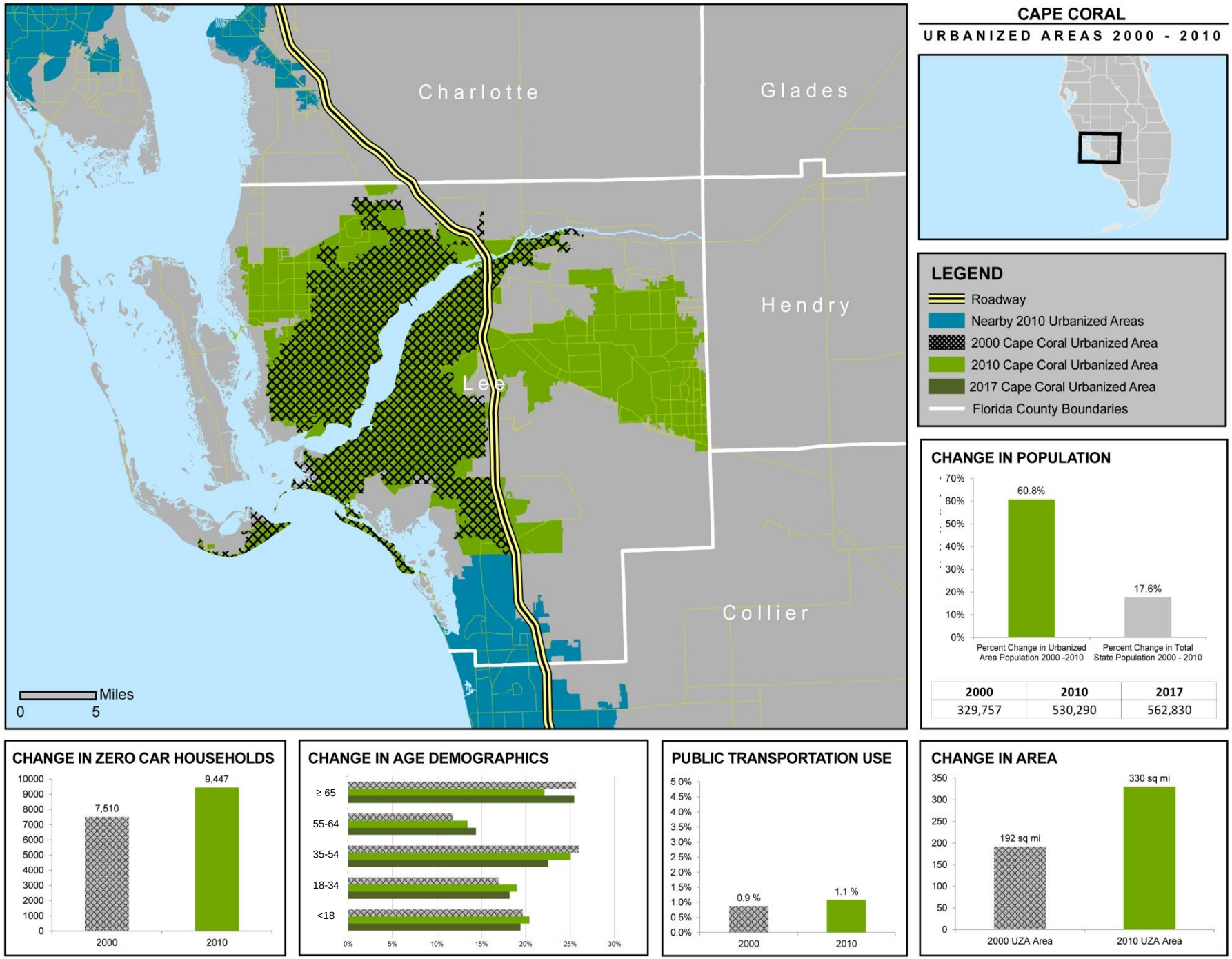


Figure 5: Cape Coral Urbanized Area, 2000 – 2010

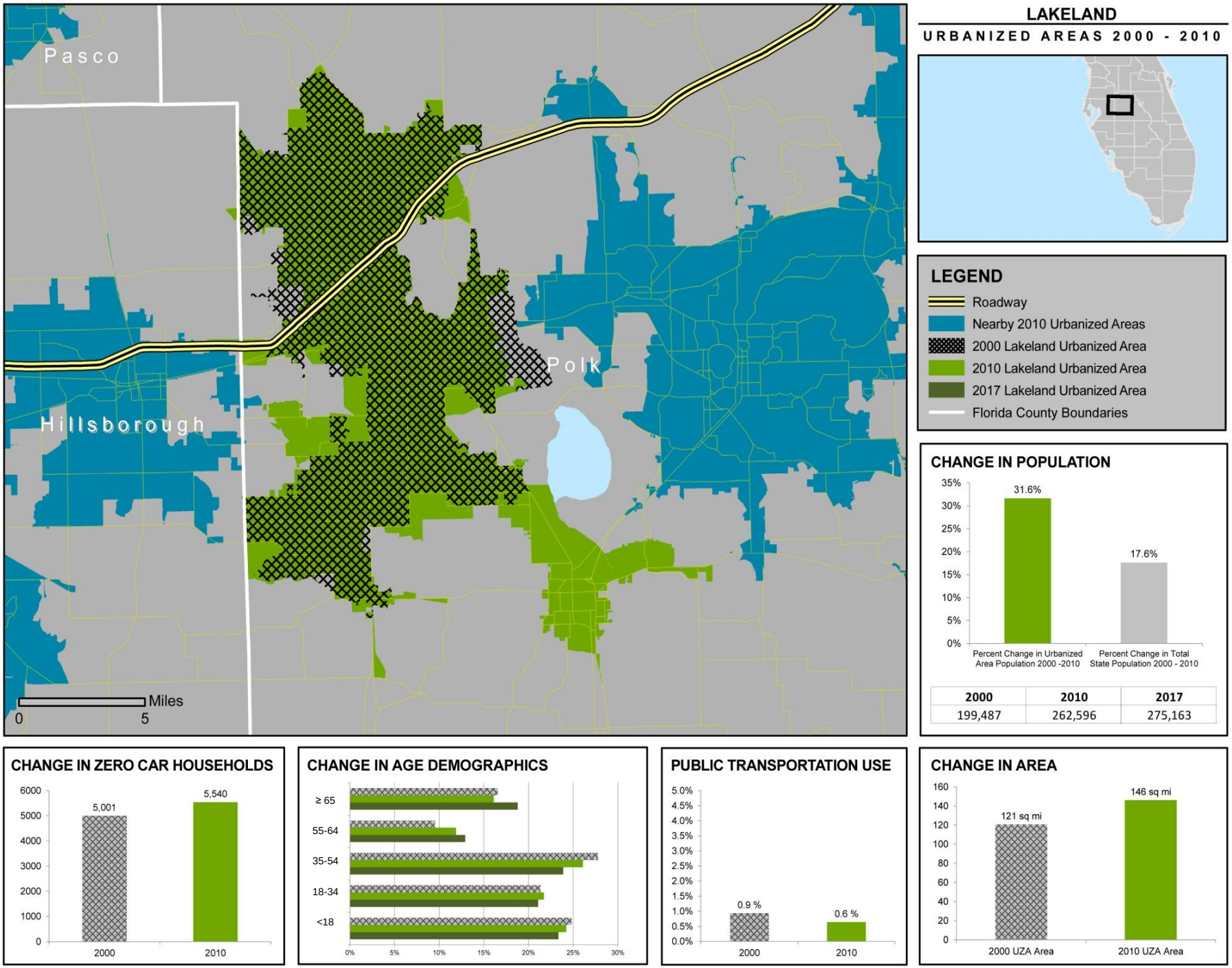


Figure 6: Lakeland Urbanized Area, 2000 – 2010

The Lakeland UZA is located in Polk County and is adjacent to the Winter Haven and Tampa-St. Petersburg UZAs, according to the map shown in Figure 6. This UZA increased from 121 square miles to 146 square miles between 2000 and 2010 and saw its population grow nearly 30 percent, from 199,487 to 262,596. The figure further shows that, while zero-car households have increased between 2000 and 2010, the number of people reporting that they use of public transportation for a work commute is lower. Population projections to the year 2017 indicate that the Lakeland UZA will grow an additional five percent to 275,163.

In Chapter 2, it was mentioned that the Lakeland-Winter Haven area was among five Florida areas in the top ten oldest areas in the U.S., having a high percentage of those aged 65 and over. Figure 6 shows that the Lakeland UZA will have increasing numbers of those aged 65 and over into 2017, along with slightly declining numbers of younger people.

The North Port–Port Charlotte UZA spans the counties of Charlotte and Sarasota and includes the southwest corner of DeSoto County. Figure 7 on the following page shows that the UZA population increased more than 38 percent between 2000 and 2010 (from 122,421 to 169,541), and is expected to grow to 177,150 in 2017. Also during this time, the number of zero-car households increased. Public transportation use is very low in this UZA, primarily due to the fact that Charlotte County does not have a fixed-route bus system. The size of this UZA grew from 89 square miles in 2000 to 119 square miles in 2010.

Figure 7 also indicates that the North Port-Port Charlotte UZA has a high number of those aged 65 and over, although the proportion has declined since 2000. The proportion of those aged 18 to 34 has declined slightly from 2010; however, the projected 2017 percentage is higher than in 2000.

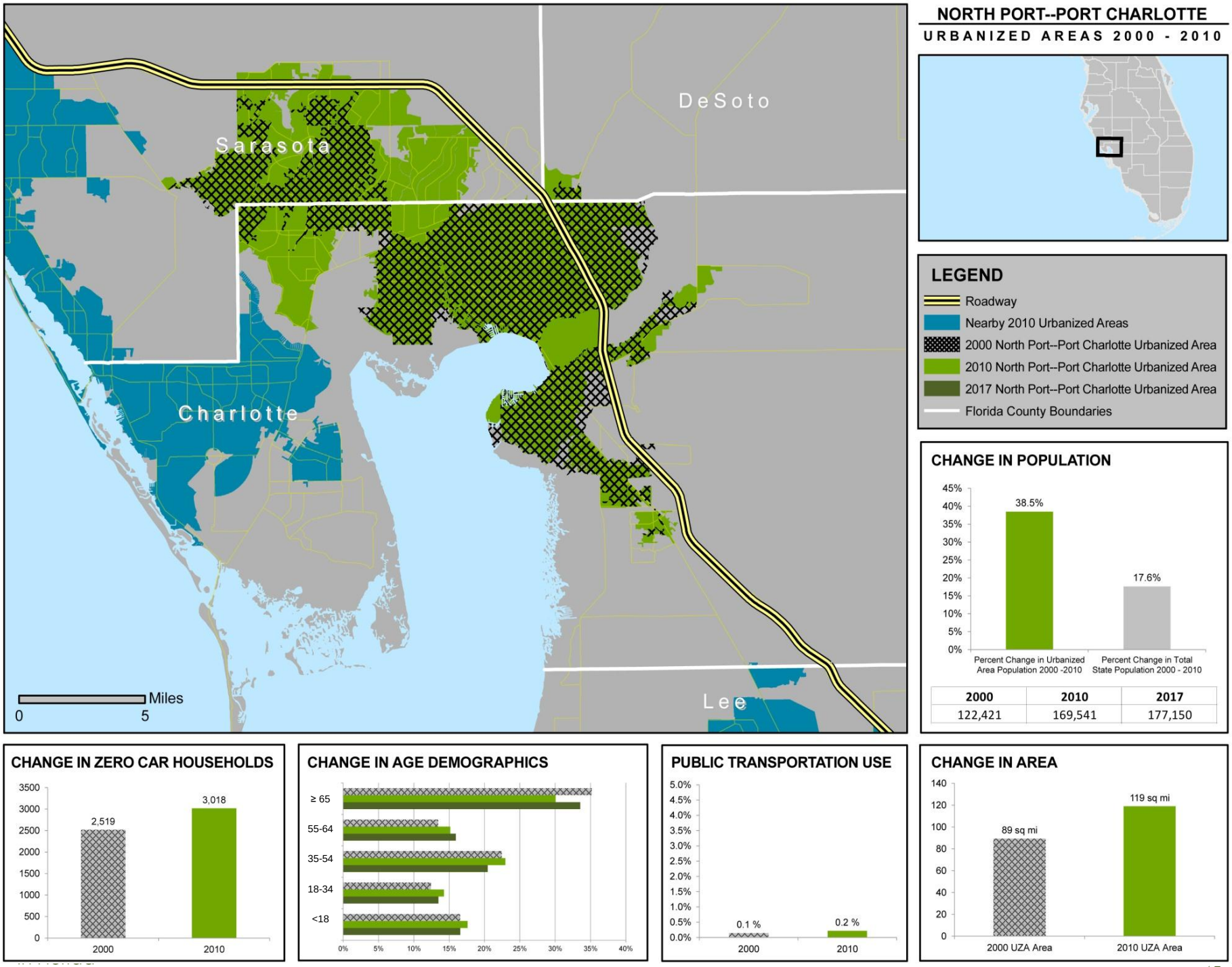


Figure 7: North Port-Port Charlotte Urbanized Area, 2000 – 2010

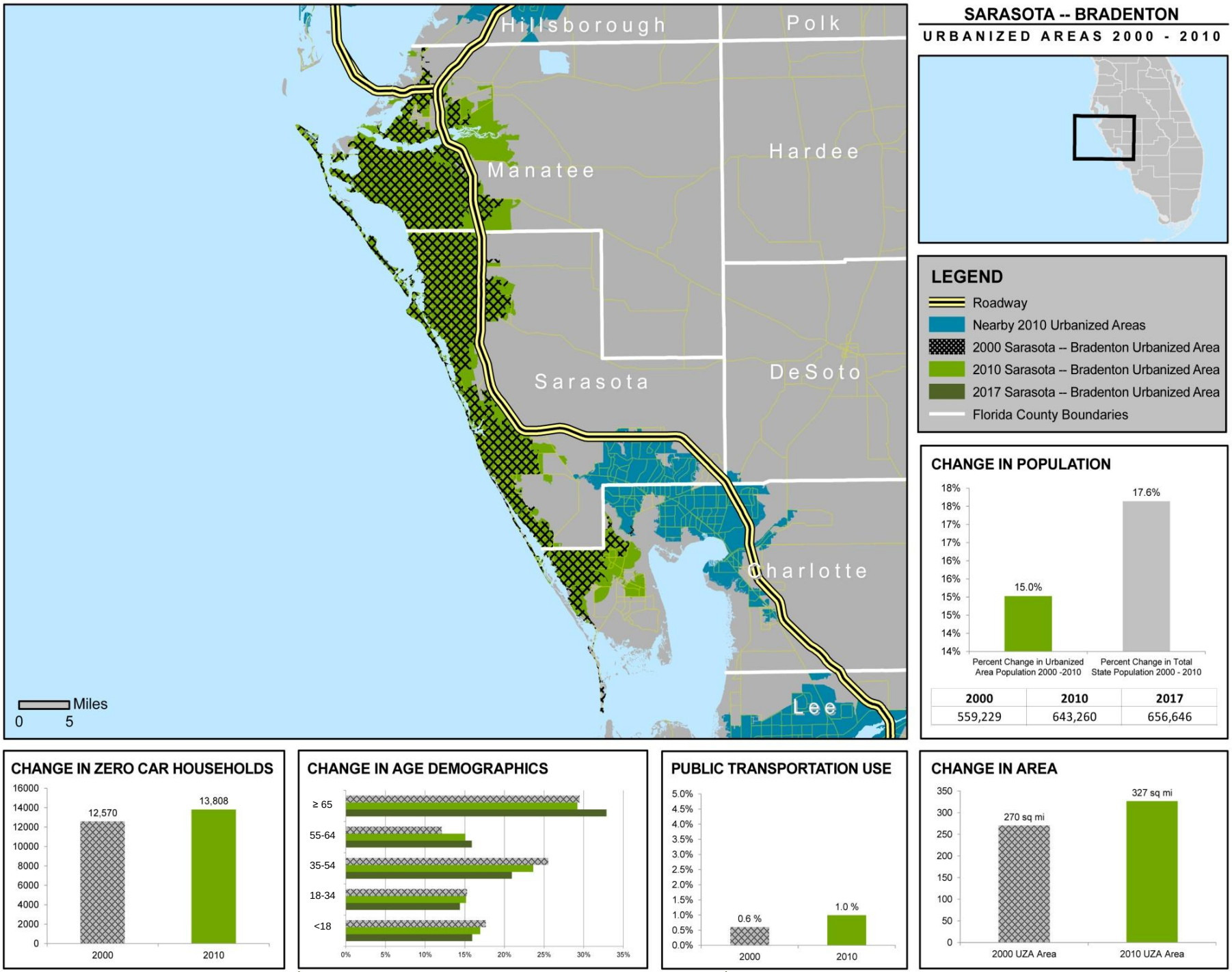


Figure 8: Sarasota-Bradenton Urbanized Area, 2000 – 2010

As shown in Figure 8, the Sarasota-Bradenton UZA spans both Manatee and Sarasota Counties (and a small amount of Charlotte County). The population of this UZA grew 15 percent between 2000 and 2010, compared to the state's overall population increase of 17.6 percent during this time. The land area of the UZA increased by 57 square miles from 2000 to 2010, and the numbers of zero-car households and those reporting that they use public transportation for the work commute also increased. 2017 population projections indicate that this UZA will grow approximately two percent from the 2010 level (643,260 to 656,646).

Figure 8 also shows the age distributions for the Sarasota-Bradenton UZA, and that the area is definitely predicted to age as 2017 approaches. In Chapter 2, it was noted that the Sarasota-Bradenton-Venice area was ranked first with the highest percentage of those aged 65 and over.

Figure 9 depicts the Sebring-Avon Park UZA, which is a new UZA as of 2010. This UZA is contained within Highlands County, and has a growing population of older residents, and a slightly declining population of younger residents. Currently, no urban fixed-route transit services operate within the Sebring-Avon Park UZA.

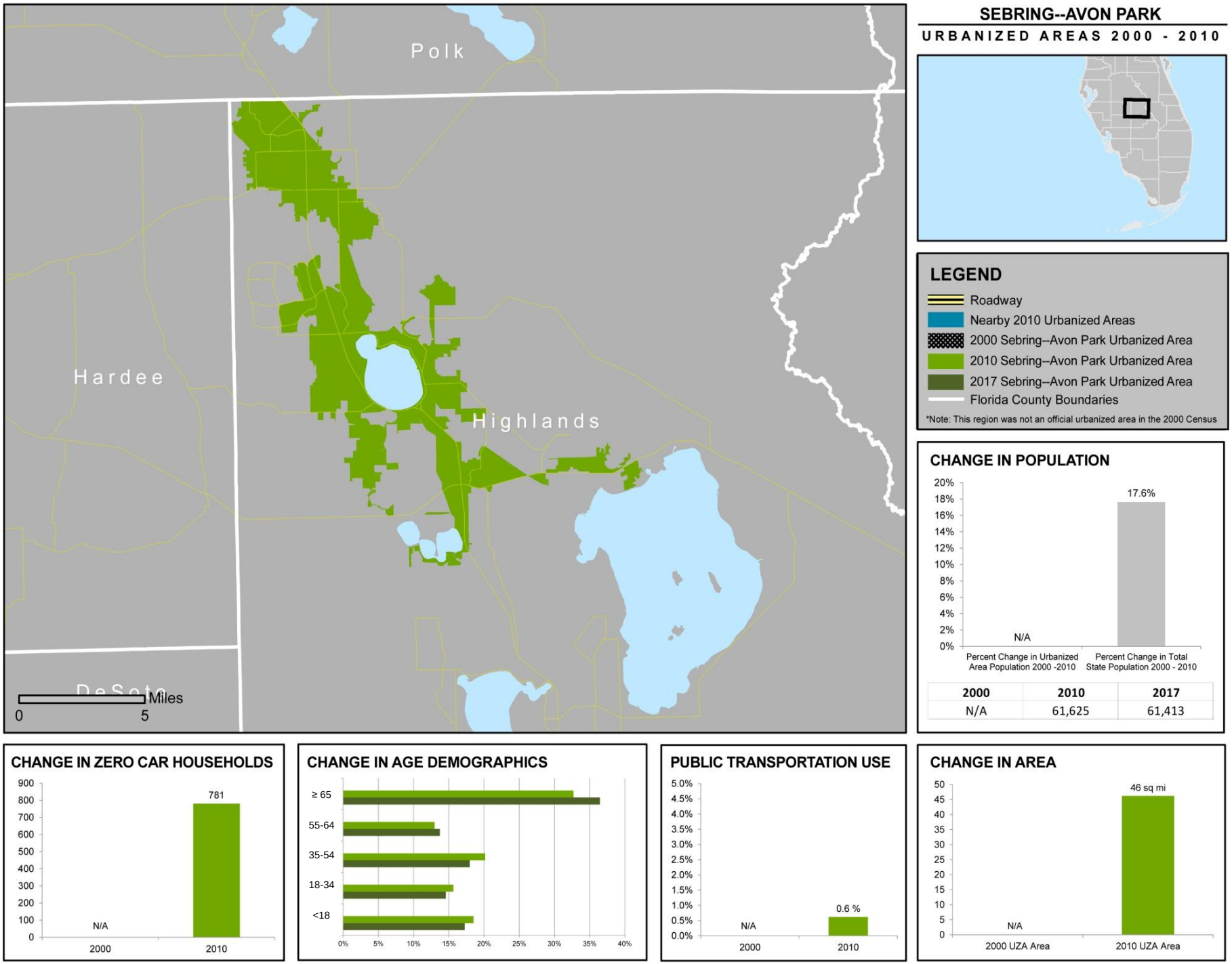


Figure 9: Sebring-Avon Park Urbanized Area, 2000 – 2010

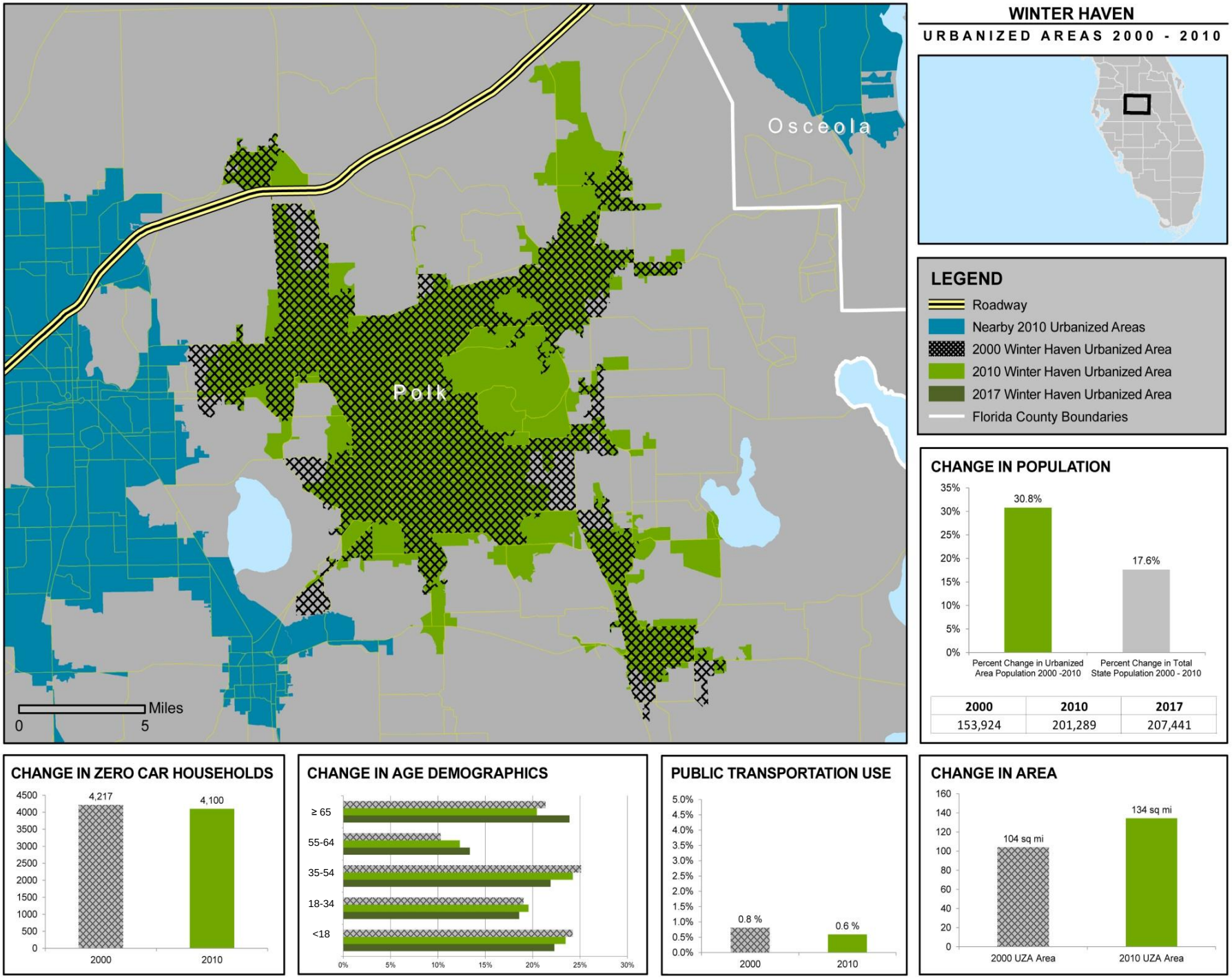


Figure 10: Winter Haven Urbanized Area, 2000 – 2010

According to the map in Figure 10, the Winter Haven UZA is contained within Polk County and is adjacent to the Lakeland UZA. Between 2000 and 2010, the population grew from 153,924 in 2000 to 201,289 in 2010, and is expected to grow another three percent to 207,441 in 2017. During the time period from 2000 to 2010, the number of zero-car households declined slightly, as did the number of people using of public transportation for the work commute, according to Census data. Figure 10 also indicates that the UZA population increased nearly 31 percent while the land area increased by 30 square miles from 2000 to 2010.

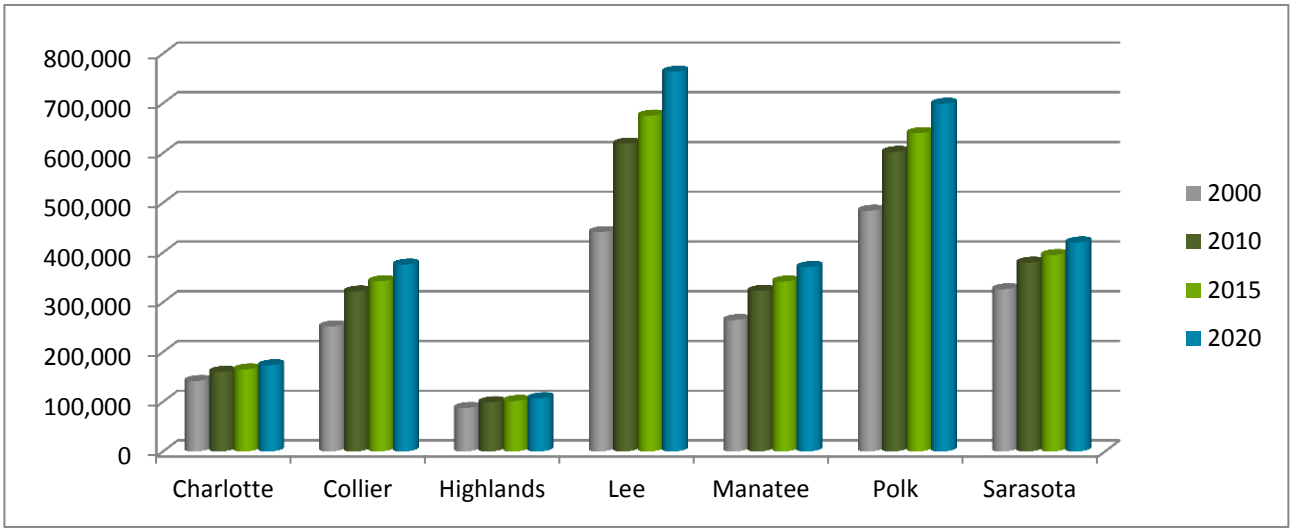
Regarding the age distribution of the Winter Haven UZA, the percent of those aged 65 and over is projected to increase through 2017. The numbers of younger people are declining slightly. As stated in the discussion of the Lakeland UZA in this section, Chapter 2 the Lakeland-Winter Haven area was among five Florida areas within the top ten oldest areas in the U.S., having a high percentage of those aged 65 and over.

Table 3 summarizes the population changes for these seven UZAs from 2000 to 2010, and includes 2017 projections. Comparisons to the Florida total UZA population is shown in the last row of the table. The fastest growing UZA among this group (and the fifth fastest-growing in the U.S.) is the Cape Coral UZA, which is contained in Lee County, one of the fastest growing counties in the state between 2000 and 2010.

Table 3: Population Trends and Projections, FDOT District One UZAs and Florida

UZA	Population			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Bonita Springs	221,251	310,298	331,261	40.3%	6.8%	49.7%
Cape Coral	329,757	530,290	562,830	60.8%	6.1%	70.7%
Lakeland	199,487	262,596	275,163	31.6%	4.8%	37.9%
North Port—Port Charlotte	122,421	169,541	177,150	38.5%	4.5%	44.7%
Sarasota—Bradenton	559,229	643,260	656,646	15.0%	2.1%	17.4%
Sebring—Avon Park	n/a	61,625	61,413	n/a	-0.3%	n/a
Winter Haven	153,924	201,289	207,441	30.8%	3.1%	34.8%
Florida	13,472,012	16,446,202	17,136,063	22.1%	4.2%	27.2%

Source: U.S. Census and ESRI

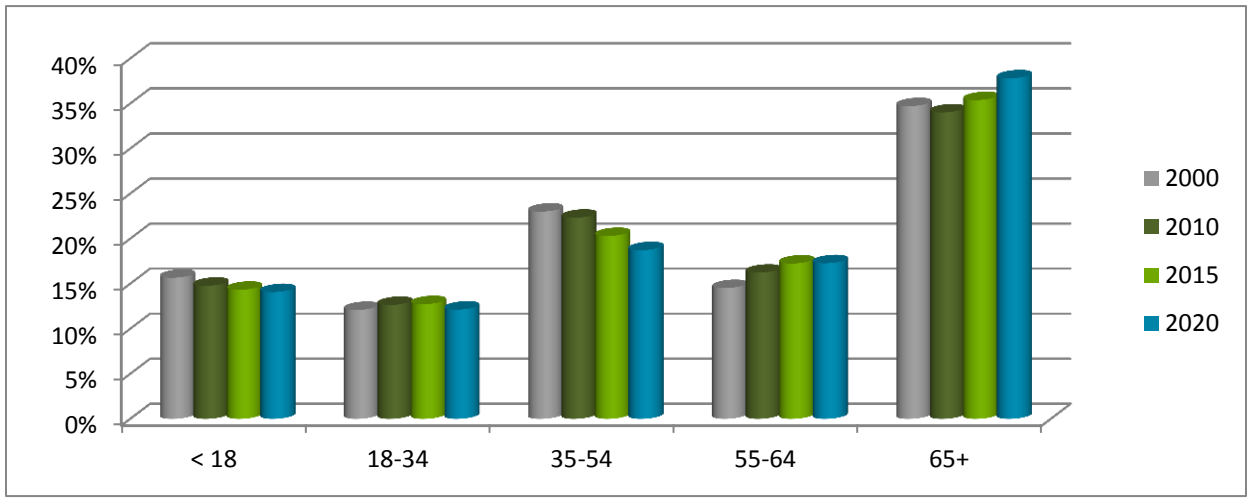


Source: U.S. Census and BEBR

Figure 11: FDOT District One Relevant County Populations
2000 and 2010 Actual, 2015 and 2020 Projected

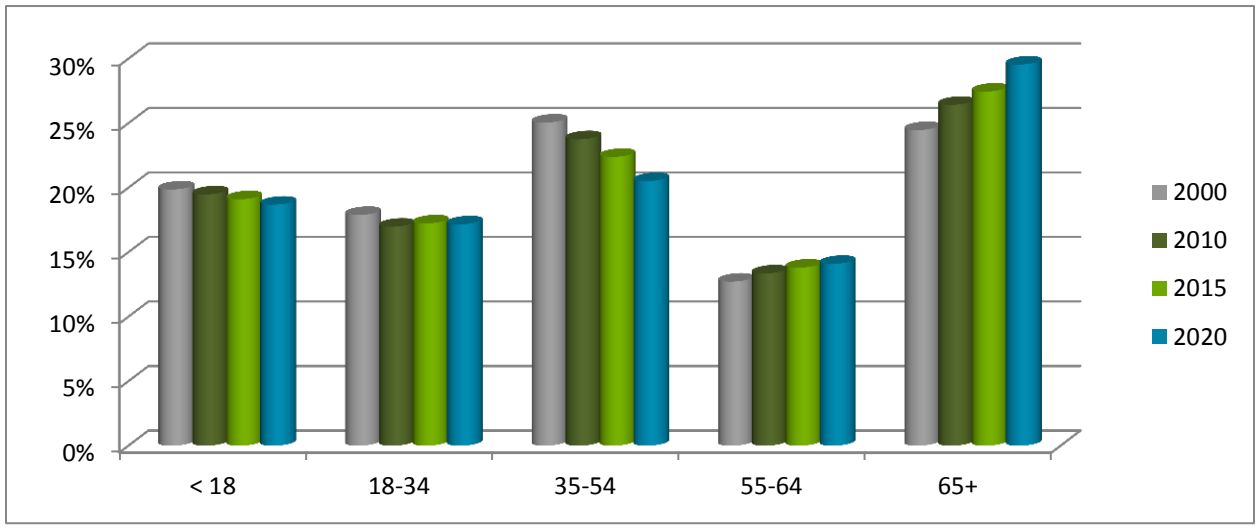
Figure 11 above shows the growth and projected growth of the counties associated with these UZAs. While 2017 population projections were available for the UZAs, the county projections are for the years 2015 and 2020, using data from BEBR.

Figures 12 through 18 below on the following pages provide some additional perspective by showing 2000 and 2010 actual age distributions for the counties that contain the UZAs described above, as well as projected distributions based on BEBR data. All of the counties are expected to have increasing percentages of the older age categories moving toward 2020. However, these counties also appear to have either flat or slightly increasing percentages of those aged 18 to 34 (also known as the Millennials). Overall, the county trends mirror the UZA trends.



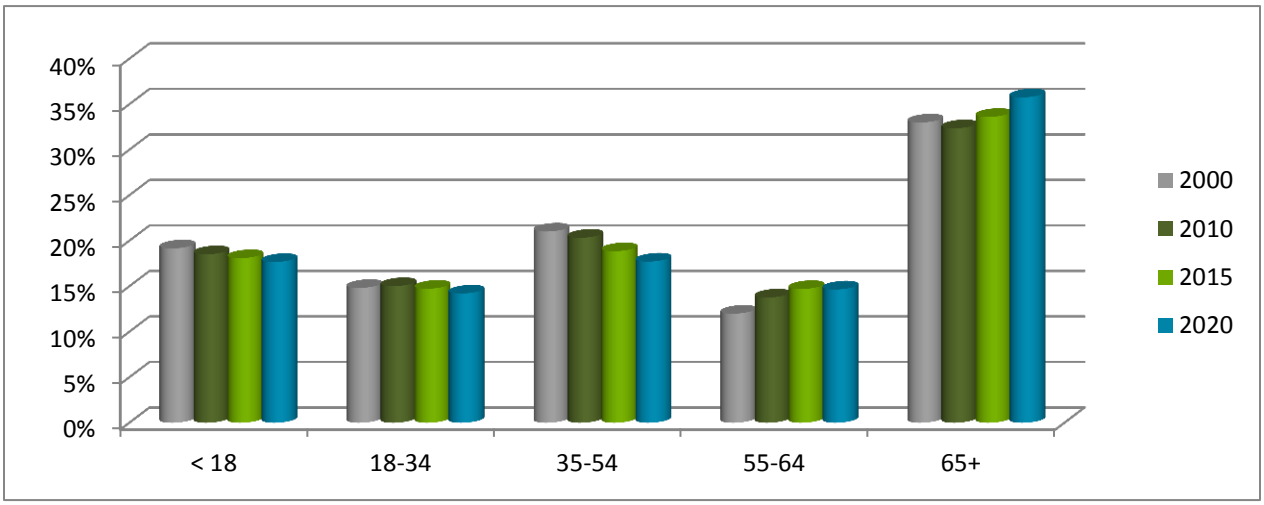
Source: U.S. Census and BEBR

Figure 12: Charlotte County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



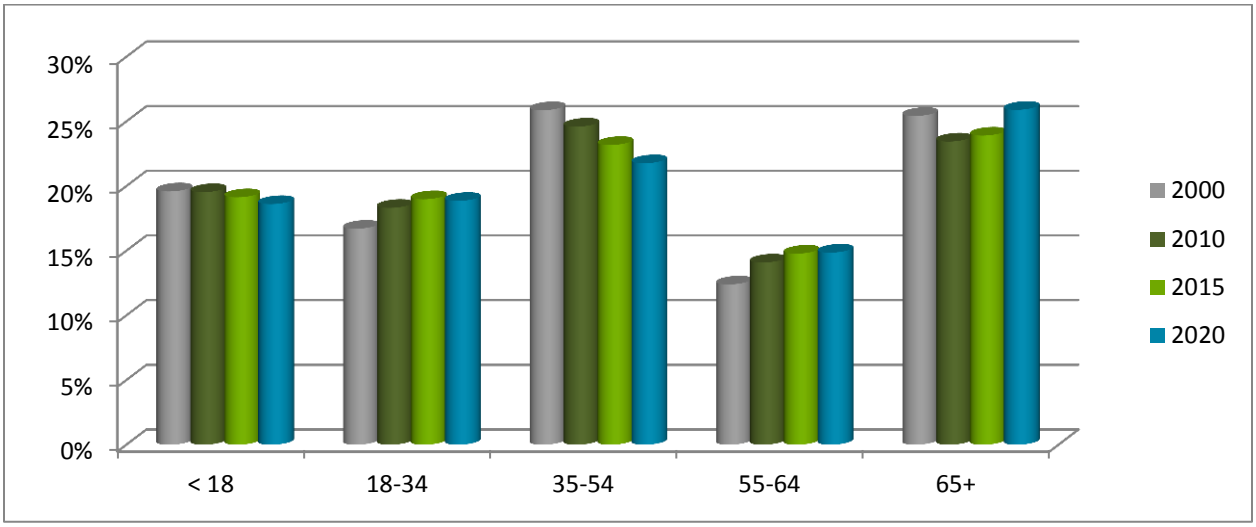
Source: U.S. Census and BEBR

Figure 13: Collier County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



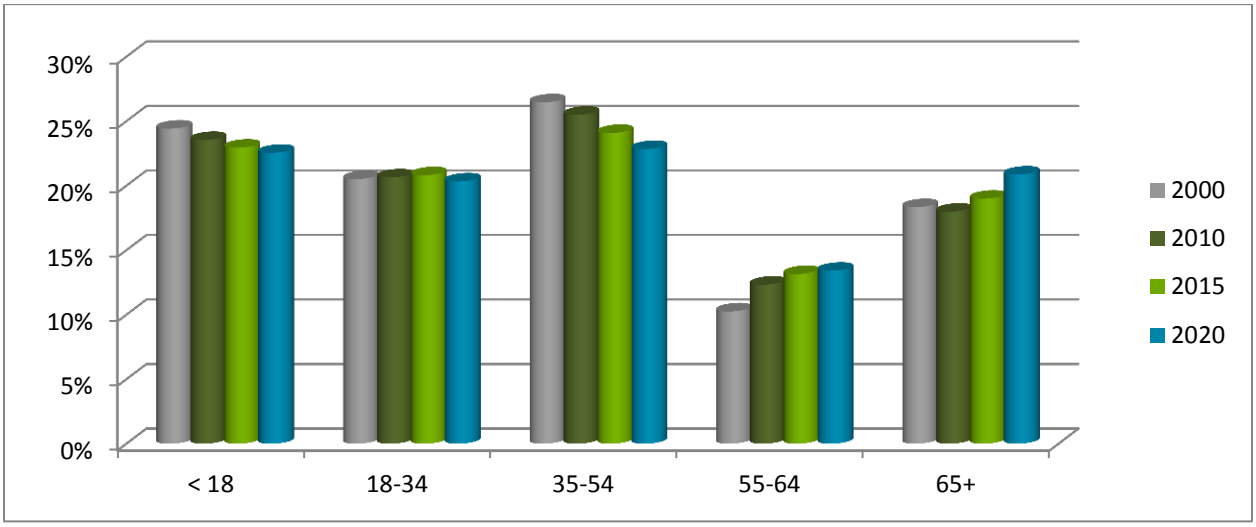
Source: U.S. Census and BEBR

Figure 14: Highlands County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



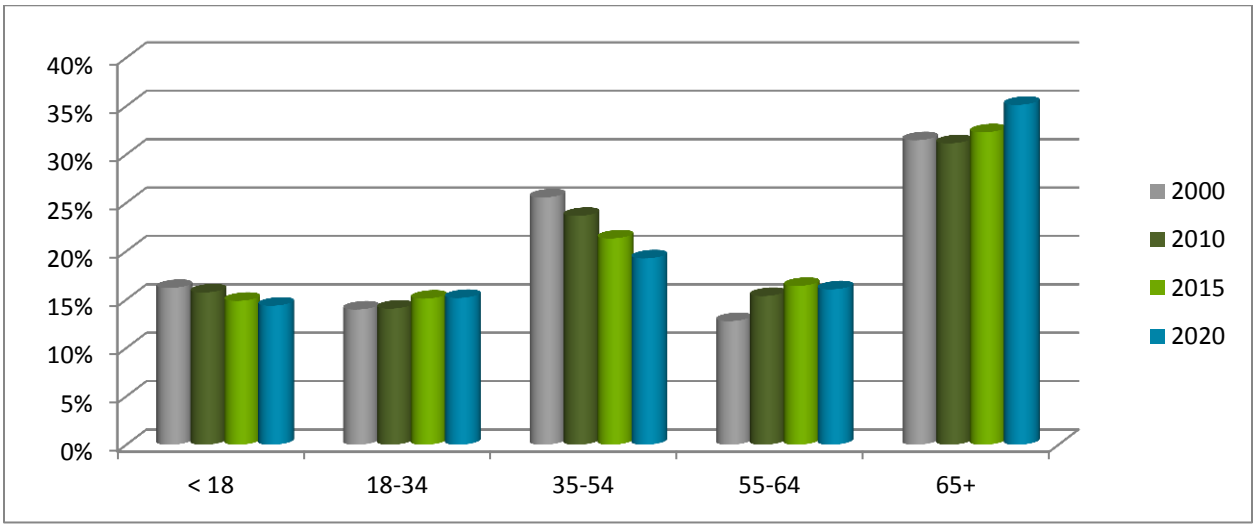
Source: U.S. Census and BEBR

Figure 15: Lee County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



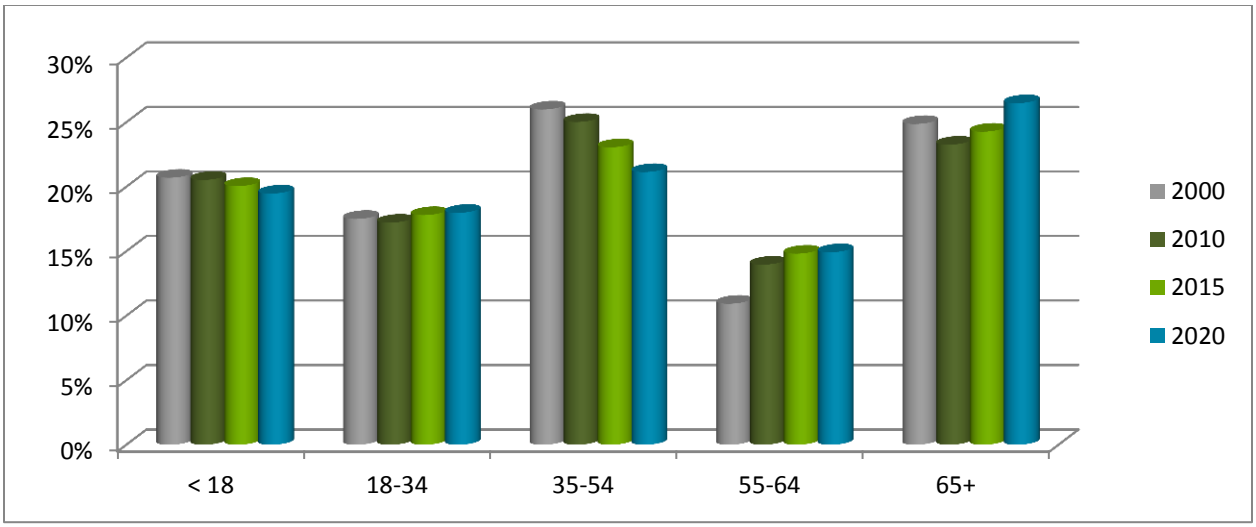
Source: U.S. Census and BEBR

Figure 16: Polk County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 17: Sarasota County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 18: Manatee County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected

Table 4 on the next page provides some information on the urban fixed-route transit agencies that operate in the UZAs in FDOT District One. As indicated in Table 4, there are a total of six transit agencies, two of which operate in Polk County (Lakeland's Citrus Connection and Polk County's Services along with Winter Haven Area Transit). Of these six systems, Winter Haven Area Transit experienced the most significant ridership and service increases from 2000 to 2010 (the system began operating in 1999). While Figure 10 noted a decline in public transportation use in the Winter Haven UZA, it is important to note that that statistic represents the number of people who indicate they commute to work by public transportation. It is not necessarily contradictory that Winter Haven Area Transit has experienced significant ridership growth. Transit ridership is represented by the number of passenger trips taken, and the increase can be reflected by a number of factors including more trips taken for purposes other than work, individuals taking higher numbers of trips, and higher use by visitors to the area, among others. All other transit agencies in this District, with the exception of Collier Area Transit, which did not begin operating until February 2001, experienced ridership gains from 2000 to 2010. In most cases, the growth in ridership was greater than the growth in revenue service miles.

Table 4: Ridership and Service Supply for FDOT District One Urban Transit Systems, 2000 and 2010

Agency	Passenger Trips			Revenue Miles		
	2000	2010	% Change	2000	2010	% Change
Collier Area Transit	n/a	1,064,910	n/a	n/a	1,230,055	n/a
Lakeland Citrus Connection	1,358,985	1,459,429	7.4%	1,099,459	1,274,537	15.9%
Lee County Transit (LeeTran)	2,271,574	3,035,272	33.6%	2,821,520	3,241,809	14.9%
Manatee County Area Transit (MCAT)	655,984	1,441,558	119.8%	708,930	1,328,753	87.4%
Polk County Transit Services/Winter Haven Area Transit (WHAT)	97,330	473,353	386.3%	183,929	725,738	294.6%
Sarasota County Area Transit (SCAT)	1,620,586	2,733,015	68.6%	1,635,128	2,794,925	70.9%
District One Total	6,004,459	10,207,537	70.0%	6,448,966	10,595,817	64.3%
Florida Total	191,899,369	245,192,620	27.8%	98,913,886	135,812,378	37.3%

Source: National Transit Database

FDOT District Two

Figures 19 through 21 illustrate the UZAs associated with counties and transit agencies contained within FDOT's District Two. Additional graphics and narrative follow the maps in the figures.

FDOT District Two contains the following UZAs:

- Gainesville (Alachua County)
- Jacksonville (Duval, Clay, and St. Johns County)
- St. Augustine (St. Johns County)

Figure 19 on the following page depicts the Gainesville UZA and how it has changed from 2000 to 2010. It is clear from the map that the UZA has grown out on all sides, increasing from 77 square miles in 2000 to 87 square miles in 2010. Interestingly, between 2000 and 2010, the population of the Gainesville UZA grew at nearly the same rate as the Florida population in total (17.7 percent and 17.6 percent, respectively). The large numbers of young people, the number of zero-car households, and the relatively high and increasing public transportation usage is largely due to the presence of the University of Florida in this UZA.

The map in Figure 19 also shows the changes in the age distribution for the Gainesville UZA. The percentage of those aged 18 to 34 is expected to decline slightly from 2010 to 2017, although it will still be greater than 40 percent. In addition, the percentage of those aged 65 and over will be increasing from 2010 to 2017. The trends are similar for Alachua County (see Figure 23 on page 63); however, the Gainesville UZA is younger, overall, than Alachua County as a whole.

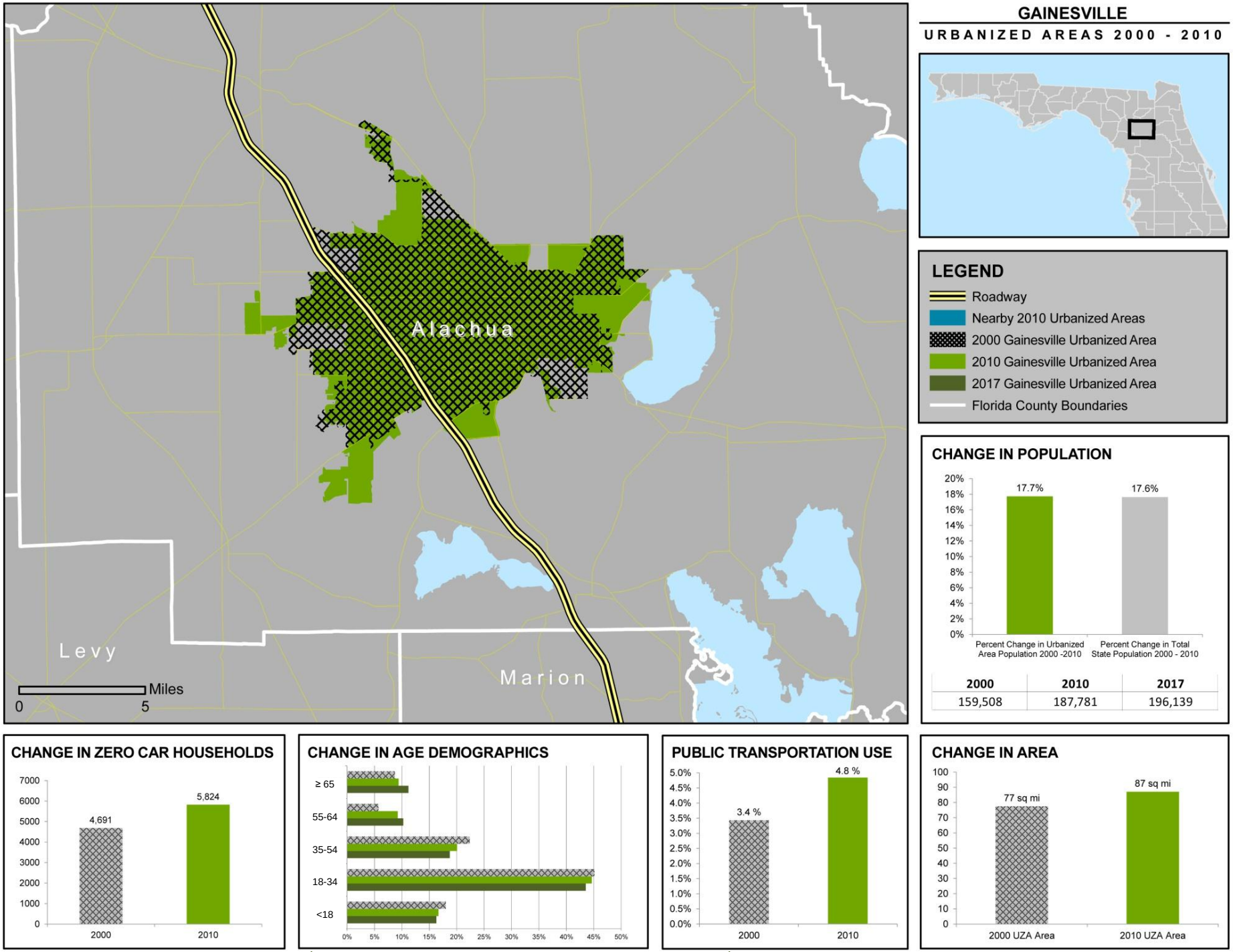


Figure 19: Gainesville Urbanized Area, 2000 – 2010

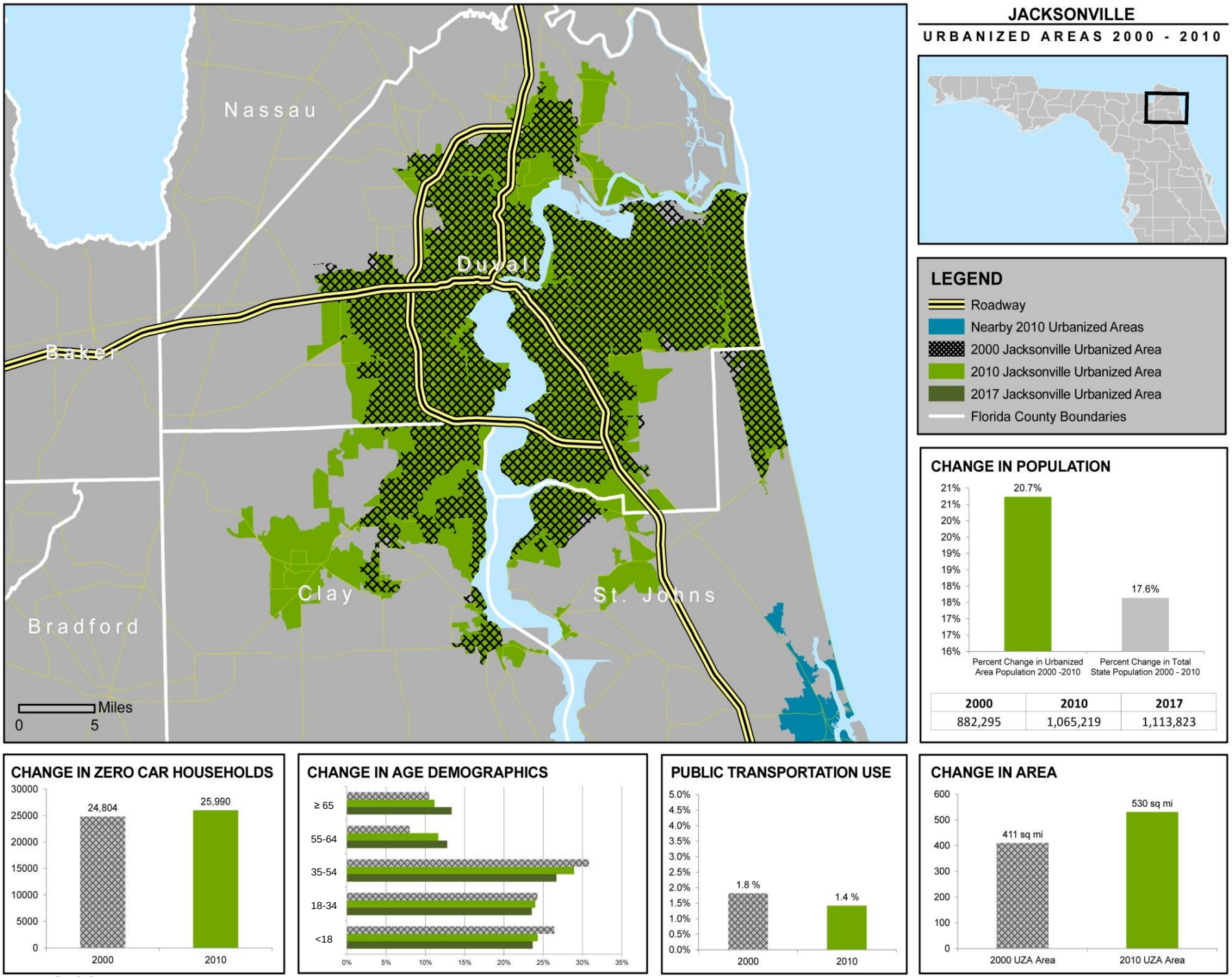


Figure 20: Jacksonville Urbanized Area, 2000 – 2010

In Figure 20 on the previous page, the Jacksonville UZA is shown. Between 2000 and 2010, this UZA increased by 119 square miles, further extending into Clay and St. Johns Counties. In addition, the UZA population increased by nearly 21 percent, from 882,295 to 1,065,219. The UZA is expected to grow approximately five percent from 2010 to 2017 to a population of 1,113,823. From 2000 to 2010, the number of zero-car households has increased slightly, while the number of people using public transportation for the work commute has declined somewhat.

Overall, the Jacksonville UZA has large numbers of younger people, but is still projected to experience increases in the number of those aged 65 and over between 2010 and 2017, along with slightly decreasing numbers of younger people.

The St. Augustine UZA is contained within St. Johns County, as shown in the map in Figure 21 on the next page. This UZA grew rapidly from a population of 53,519 in 2000 to 69,173 in 2010, an increase of approximately 29 percent. 2017 population projections indicate that the St. Augustine UZA will grow at the relatively rapid pace of approximately 13 percent from 2010 to 2017, to a population of 77,813. Between 2000 and 2010, this UZA experienced an increase in the number of zero-car households. Use of public transportation is quite small, but the County operates a relatively new service, the Sunshine Bus system.

Also shown in Figure 21 is the age distribution for the St. Augustine UZA. The UZA experienced an increase in the number of those aged 18 to 34 between 2000 and 2010; however, it appears this trend is reversing as 2017 approaches, with expectations of slightly fewer younger people and higher percentages of older people residing in the UZA. In contrast, St. Johns County as a whole is predicted to have a slightly higher percentage of those aged 18 to 34 by 2020, according to Figure 26 on page 65.

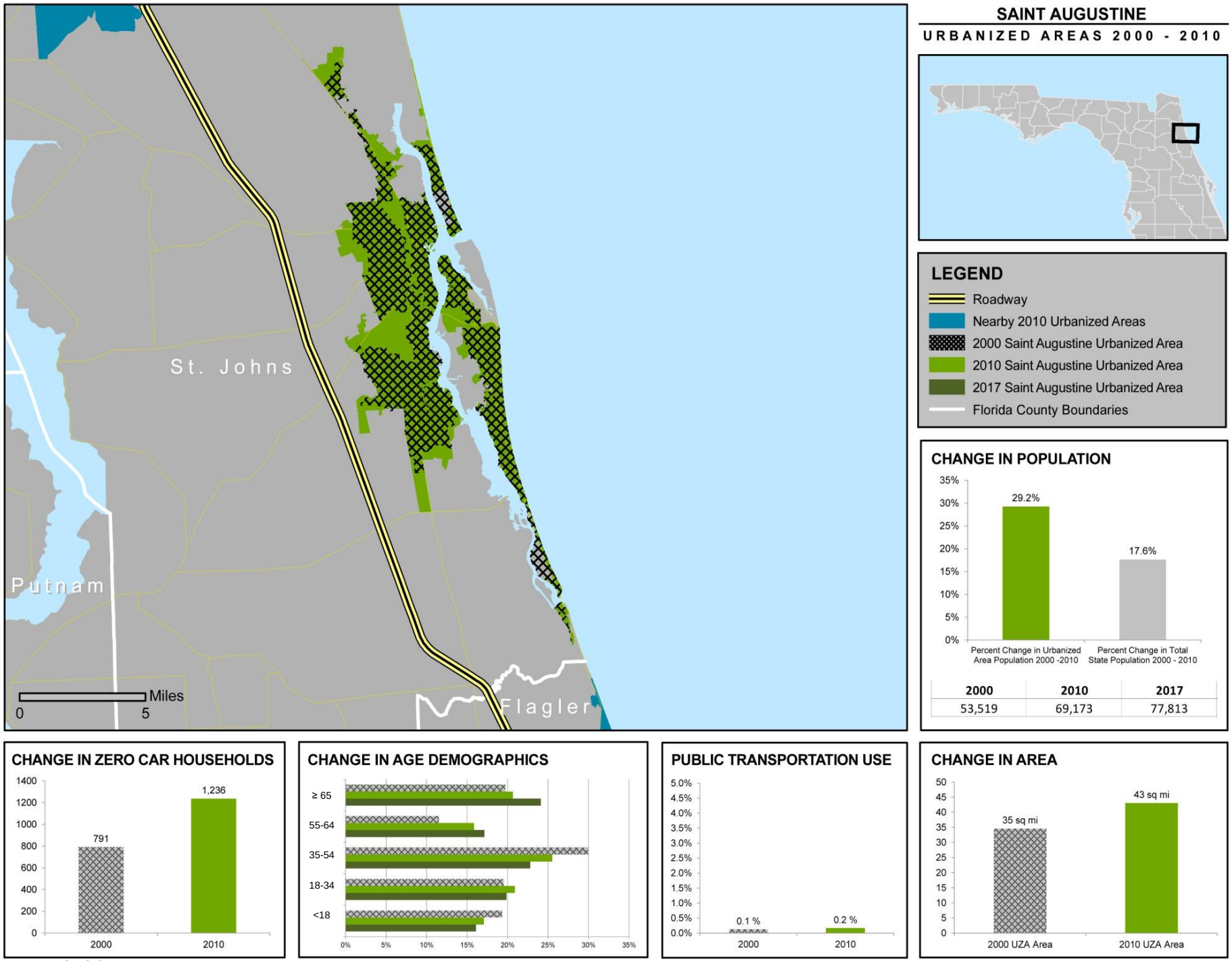


Figure 21: St. Augustine Urbanized Area, 2000 – 2010

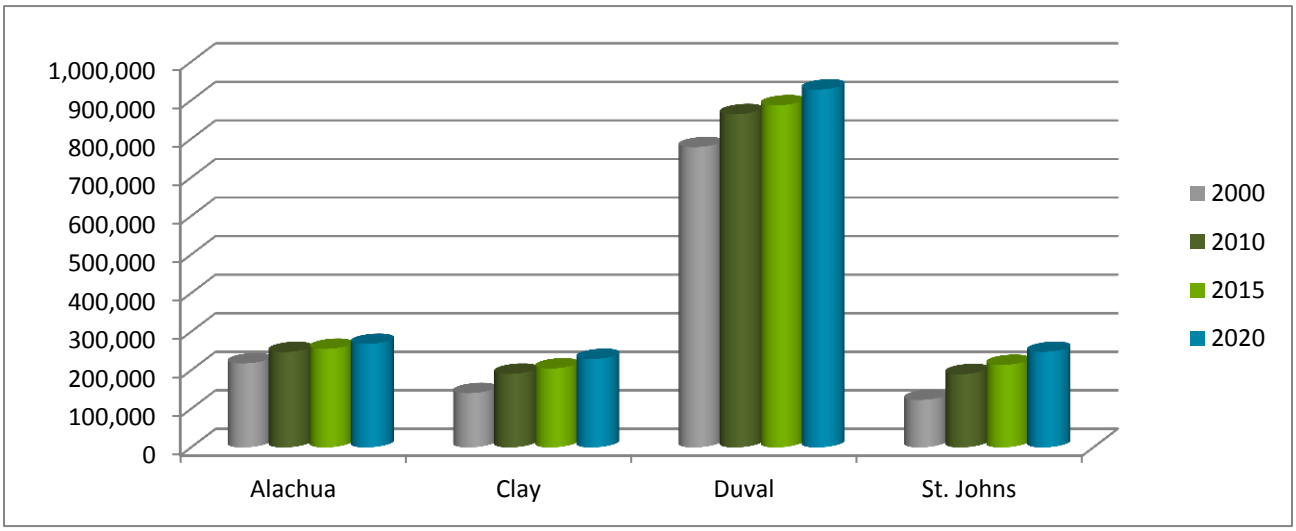
Table 5 summarizes the population changes for these three UZAs from 2000 to 2010, as well as 2017 projections. While all three UZAs grew significantly from 2000 to 2010, the St. Augustine UZA had the largest increase, and is projected to increase a total of 45 percent from 2000 to 2017. Figure 22 on the next page shows the growth and projected growth of the counties associated with these UZAs.

Figures 23 through 26 on the following pages provide some actual and projected age distribution data for the three counties associated primarily with the UZAs described above. Comparisons can be made to the age distribution data in the UZAs. Even with their relatively high shares of younger people, Alachua and Duval Counties are still projected to see significantly higher percentages of persons age 65 and over in the coming years. St. Johns County is aging as well, but appears to also be gaining in the category of those aged 18 to 34.

Table 5: Population Trends and Projections, FDOT District Two UZAs and Florida

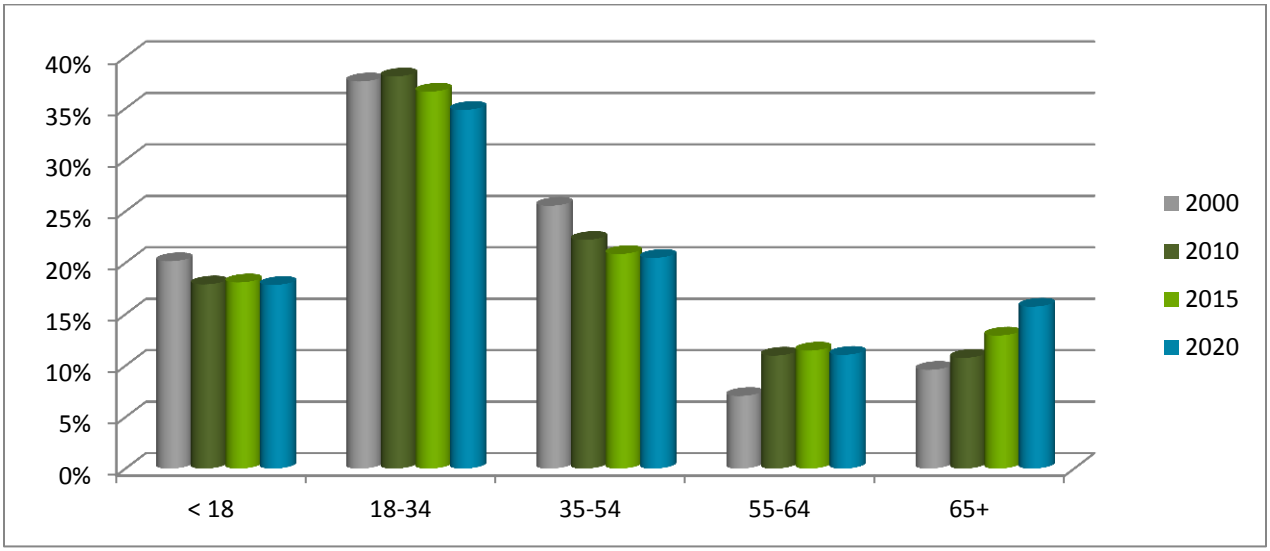
UZA	Population			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Gainesville	159,508	187,781	196,139	17.7%	4.5%	23.0%
Jacksonville	882,295	1,065,219	1,113,823	20.7%	4.6%	26.2%
St. Augustine	53,519	69,173	77,813	29.3%	12.5%	45.4%
Florida	13,472,012	16,446,202	17,136,063	22.1%	4.2%	27.2%

Source: U.S. Census and ESRI



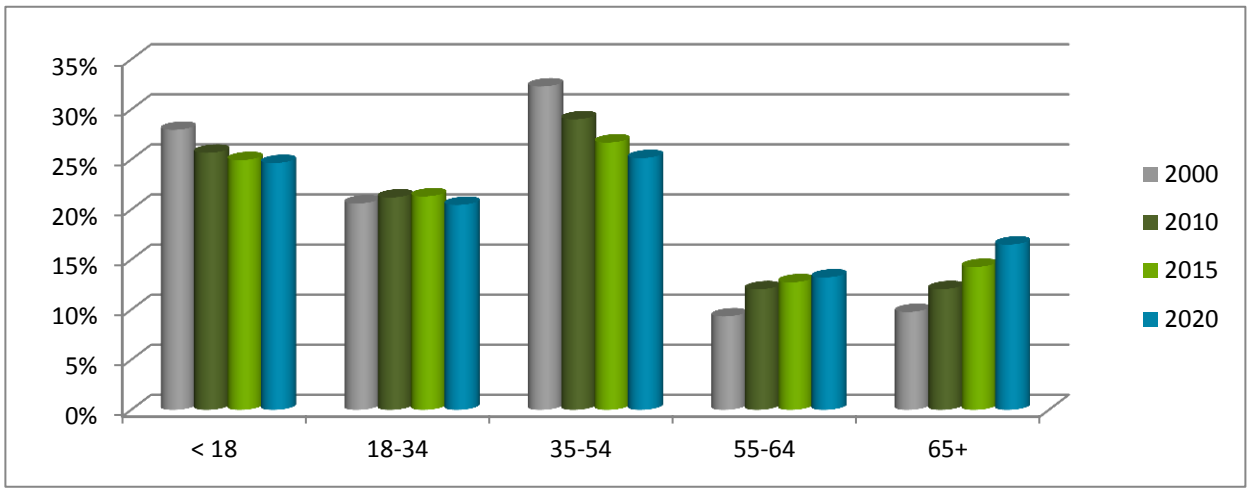
Source: U.S. Census and BEBR

Figure 22: FDOT District Two Relevant County Populations
2000 and 2010 Actual, 2015 and 2020 Projected



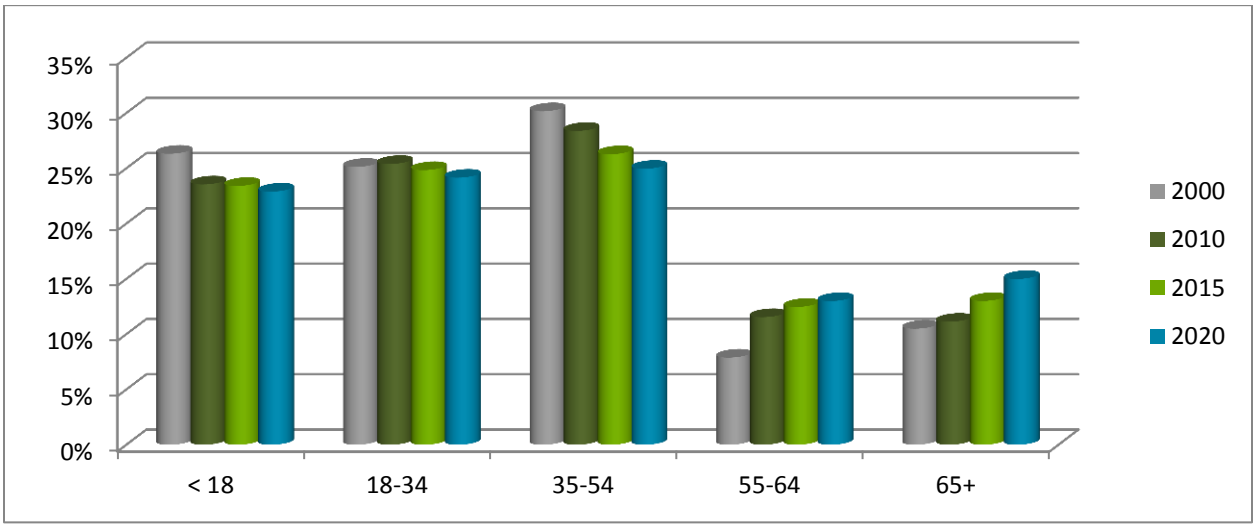
Source: U.S. Census and BEBR

Figure 23: Alachua County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



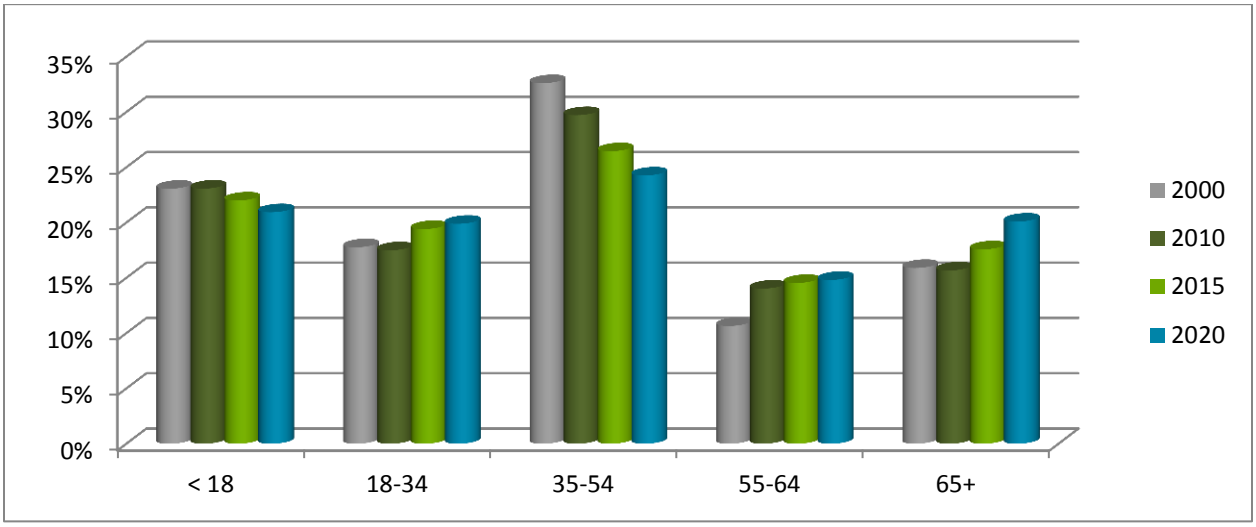
Source: U.S. Census and BEBR

Figure 24: Clay County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 25: Duval County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 26: St. Johns County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected

Table 6 on the following page summarizes some statistics about the three urban fixed-route transit systems that operate in District Two and in these UZAs. Both the Gainesville Regional Transit System and the Jacksonville Transportation Authority have ridership increases from 2000 to 2010 that are higher than the Florida total increase during this time period. For Jacksonville, ridership grew slightly faster than the level of service, as measured by revenue miles. While the number of people in the Jacksonville UZA reporting that they commute by public transportation declined (see Figure 20), increases in the number of transit trips, or ridership can result from a number of factors including more trips taken for purposes other than work, individuals taking more trips, and higher use by visitors to the area, among others. Ridership in Gainesville grew more than 80 percent over the ten-year period from 2000 to 2010. The Sunshine Bus system began operating in St. Johns County in 2006.

Table 6: Ridership and Service Supply for FDOT District Two Urban Transit Systems, 2000 and 2010

Agency	Passenger Trips			Revenue Miles		
	2000	2010	% Change	2000	2010	% Change
Gainesville Regional Transit System (RTS)	5,180,872	9,373,060	80.9%	1,855,587	2,808,703	51.4%
Jacksonville Transportation Authority (JTA)	8,736,406	11,227,845	28.5%	7,455,869	9,384,591	25.9%
St. Johns County (Sunshine Bus)	n/a	185,863	n/a	n/a	457,381	n/a
District Two Total	13,917,278	20,786,768	49.4%	9,311,456	12,650,675	35.9%
Florida Total	191,899,369	245,192,620	27.8%	98,913,886	135,812,378	37.3%

Source: National Transit Database

FDOT District Three

Figures 27 through 30 illustrate the UZAs associated with counties and transit agencies contained within FDOT's District Three. Additional graphics and narrative follow the maps in the figures.

FDOT District Three contains the following UZAs:

- Fort Walton Beach-Navarre-Wright (Okaloosa, Santa Rosa, and Walton Counties)
- Panama City (Bay County)
- Pensacola (Escambia and Santa Rosa Counties)
- Tallahassee (Leon County)

The UZA depicted in Figure 27 is located in Okaloosa, Santa Rosa, and Walton Counties. The population of the Fort Walton Beach-Navarre-Wright UZA increased more than 25 percent between 2000 and 2010, from 152,741 to 191,917, as its land area extended further west into Santa Rosa County and east into Walton County to include the San Destin resort area. In 2017, the UZA population is expected to be 198,138, a three percent increase from 2010.

The UZA is predicted to age in the coming years, while losing shares of younger age categories. Although, in 2000, the UZA had a large share of those aged 35 to 54. Between 2000 and 2010, the number of zero-car households increased, although public transportation use for the work commute remains small due to the relatively small operation of the transit system in Okaloosa County (The Wave).

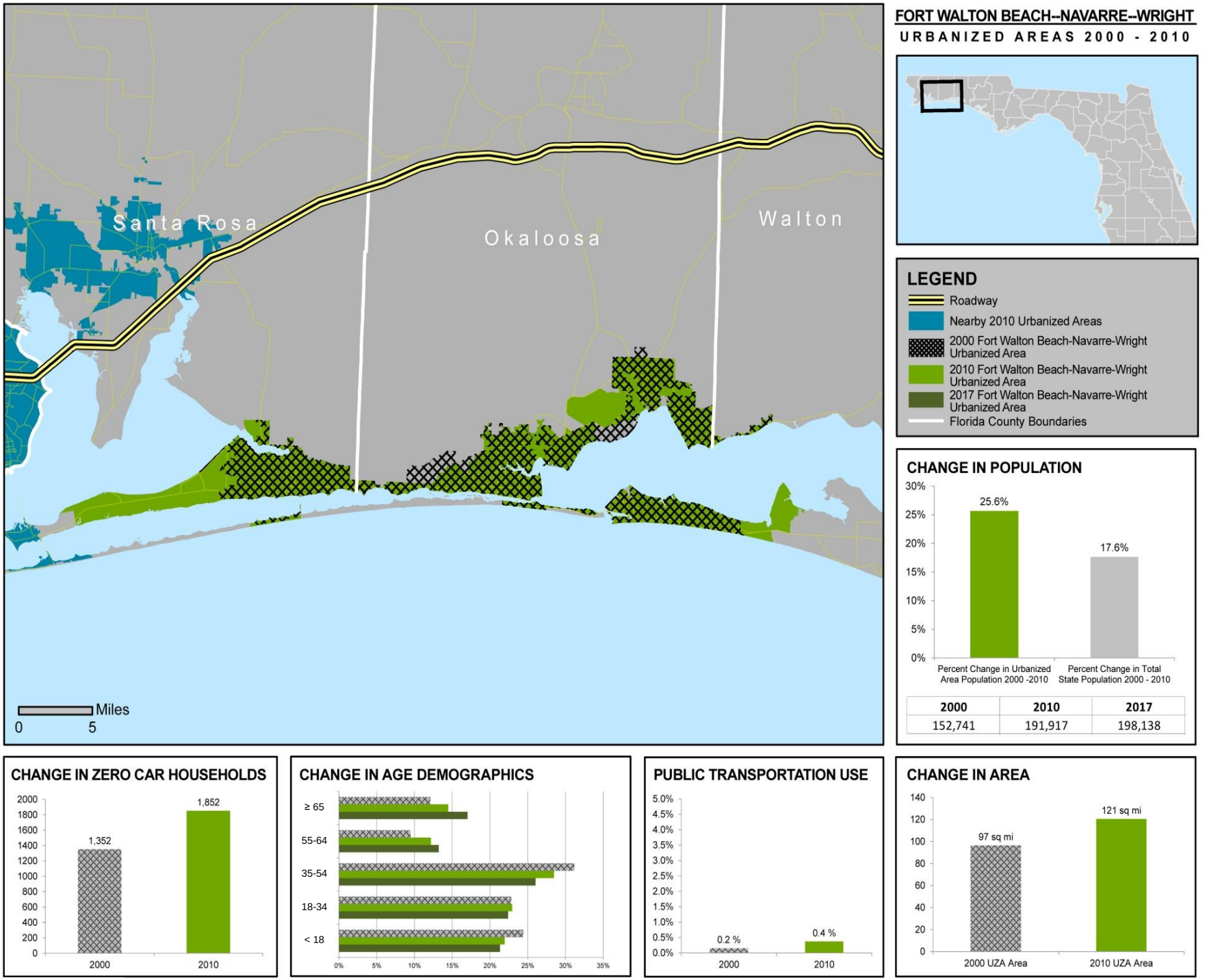


Figure 27: Fort Walton Beach-Navarre-Wright Urbanized Area, 2000 – 2010

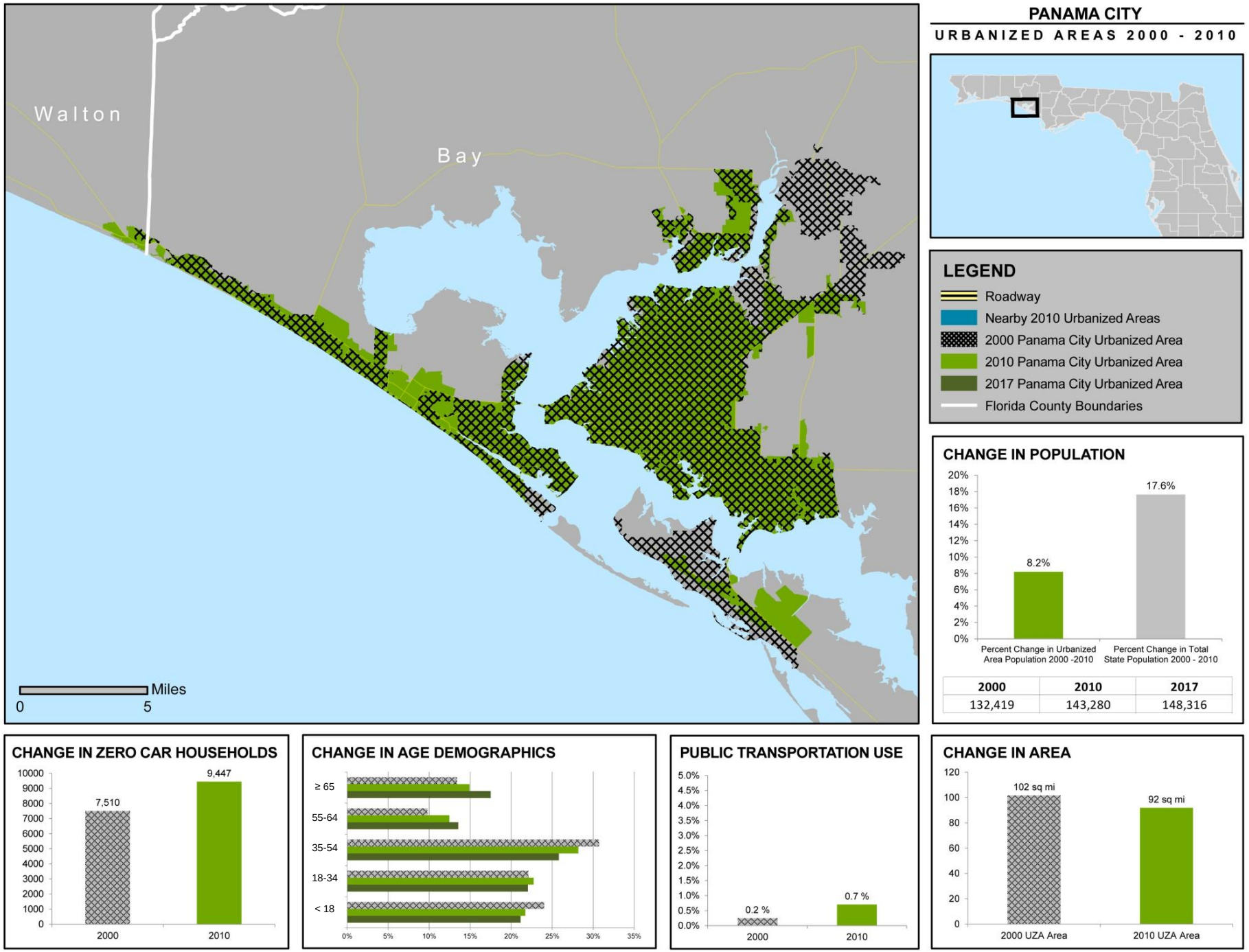


Figure 28: Panama City Urbanized Area, 2000 – 2010

Figure 28 shows the Panama City UZA, located primarily in Bay County. The UZA population only increased 8 percent between 2000 and 2010, while the land area actually declined by 10 square miles, as depicted on the map in the figure. The population is projected to be 148,316 in 2017. This UZA gained some residents in the category of those aged 18 to 34 between 2000 and 2010, although the share of this age cohort is predicted to decline slightly by 2017. The number of older people has been increasing since 2000, and is expected to continue increasing into 2017. Between 2000 and 2010, the number of zero-car households has also increased, while public transportation use for the work commute has increased slightly. The Bay Town Trolley, a relatively small transit operation, provides fixed route services in the UZA.

Figure 29 depicts the Pensacola UZA, which is located mainly in Escambia County, but also extends into Santa Rosa County and, as of 2010, even into the southeastern tip of Alabama. It should be noted, however, that the information in the charts contained within the figure represent Florida data only; no Alabama data were available for this analysis. This might explain the relatively modest increase in the UZA land area of 14 square miles between 2000 and 2010. Similarly, the population was shown to increase five percent during this time. By 2017, the population of the Pensacola UZA is expected to increase another 3 percent, to 350,537.

Within the Pensacola UZA, Figure 29 also shows that the number of zero-car households declined between 2000 and 2010, as did the use of public transportation, which is also evident in Table 8 on page 77. Similar to the other Florida Panhandle UZAs and counties, the Pensacola UZA contains relatively larger numbers of younger people relative to older people. However, in the coming years, the proportion of younger people is expected to decline slightly while the proportion of older people increases, as also shown in Figure 29.

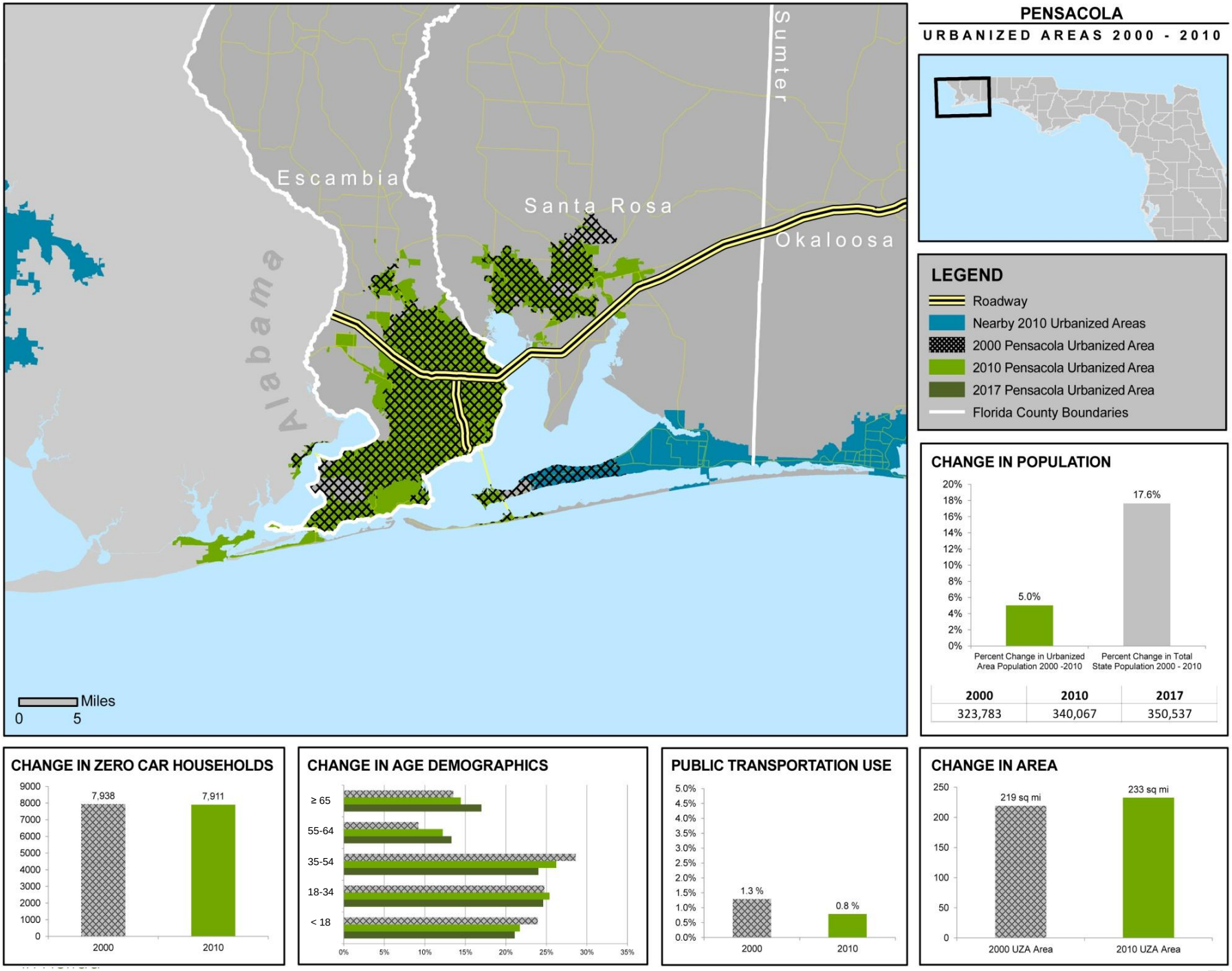


Figure 29: Pensacola Urbanized Area, 2000 – 2010

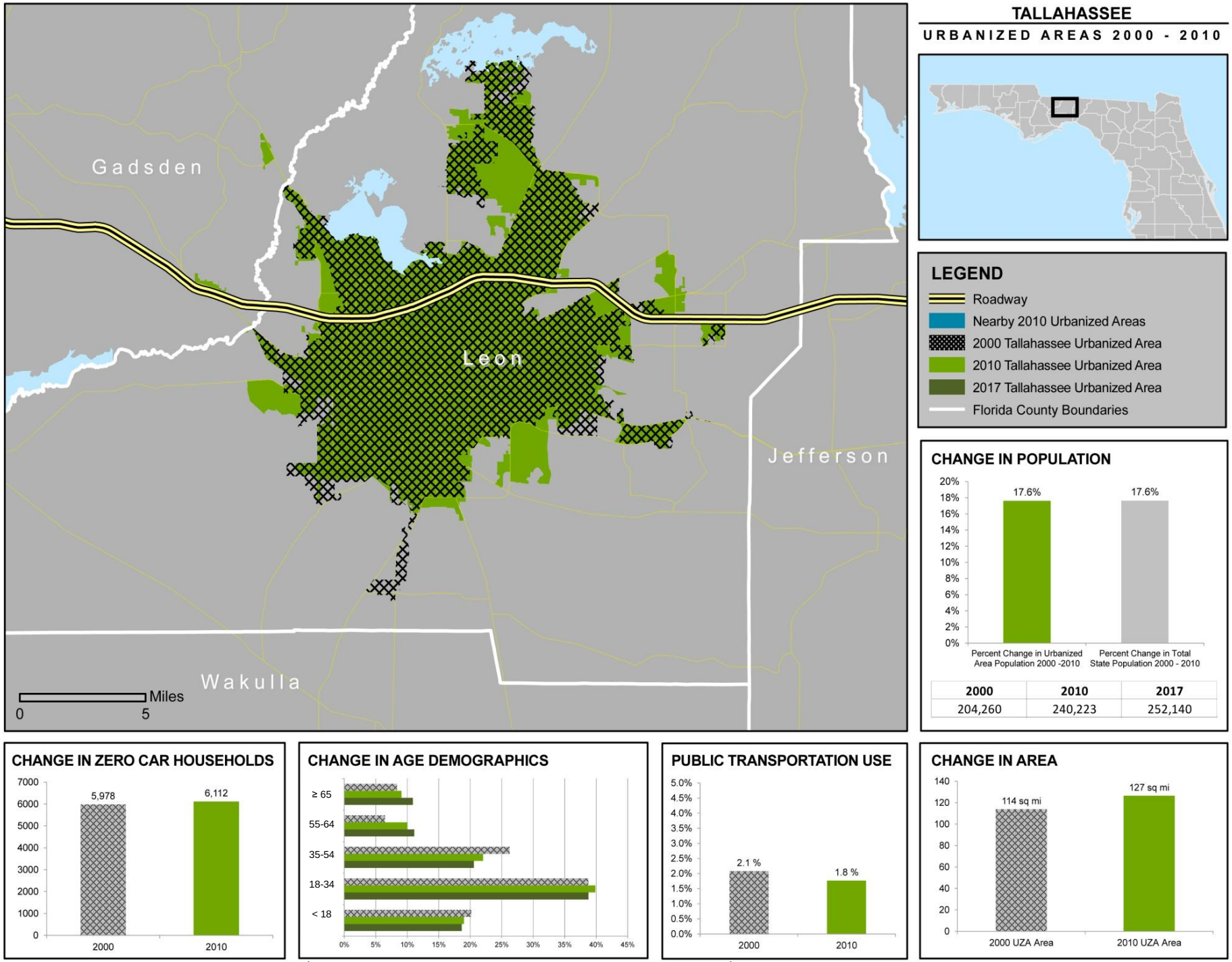


Figure 30: Tallahassee Urbanized Area, 2000 – 2010

The Tallahassee UZA is shown in Figure 30 above. It is contained within Leon County and the map provides evidence of the increase in area on nearly all sides between 2000 and 2010. The UZA population increased at approximately the same rate as the Florida population over this time period, 17.6 percent. Its population is projected to grow another 5 percent to 252,140 in 2017. This UZA has a high share of younger people, primarily due to the presence of major universities including Florida State University and Florida A & M University, although it is also expected to age in the coming years. Between 2000 and 2010, the number of zero-car households increased very slightly, while the use of public transportation for the work commute declined slightly.

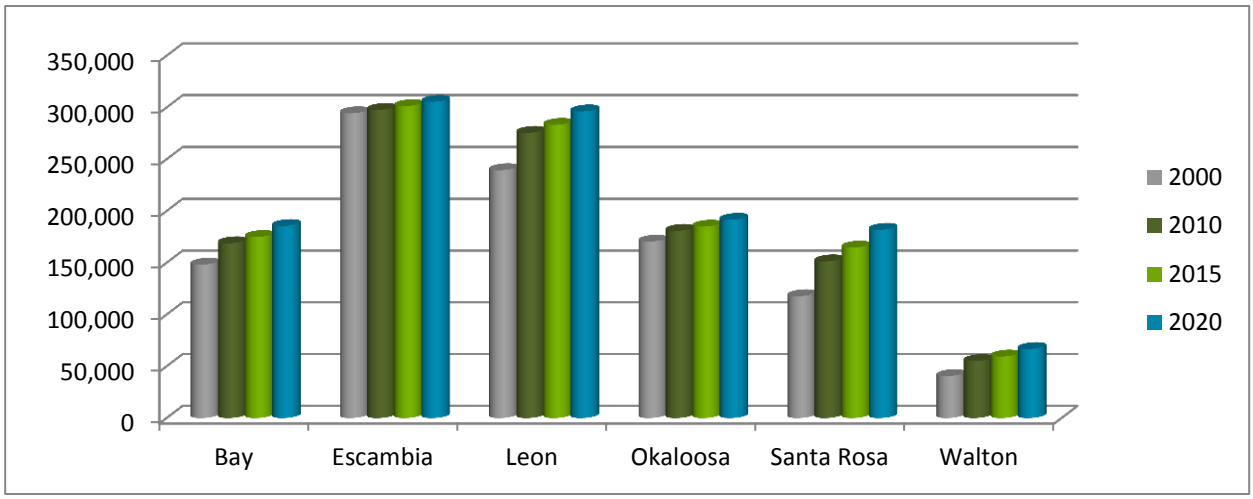
Table 7 provides population data for these four UZAs as well as the state as a whole, showing actual population in 2000 and 2010, and projected population for 2017. The fastest growing UZA among this group is the Fort Walton Beach-Navarre-Wright UZA, which grew more than 25 percent between 2000 and 2010, and is projected to grow another 3 percent by 2017. The Tallahassee UZA also grew quickly, as mentioned above, at a rate of more than 17 percent between 2000 and 2010. Similar trends are found in Figure 31 on the next page, which shows population and population projections for the counties associated with these UZAs.

Figures 32 through 37 on the following pages provide actual and projected age distributions for the counties associated with the UZAs in FDOT District Three. The figures show that the age distributions look quite similar for the panhandle counties of Bay, Escambia, Okaloosa, Santa Rosa, and Walton (and similar to the respective UZAs). Leon County differs in its much higher share of those aged 18 to 34.

Table 7: Population Trends and Projections, FDOT District Three UZAs and Florida

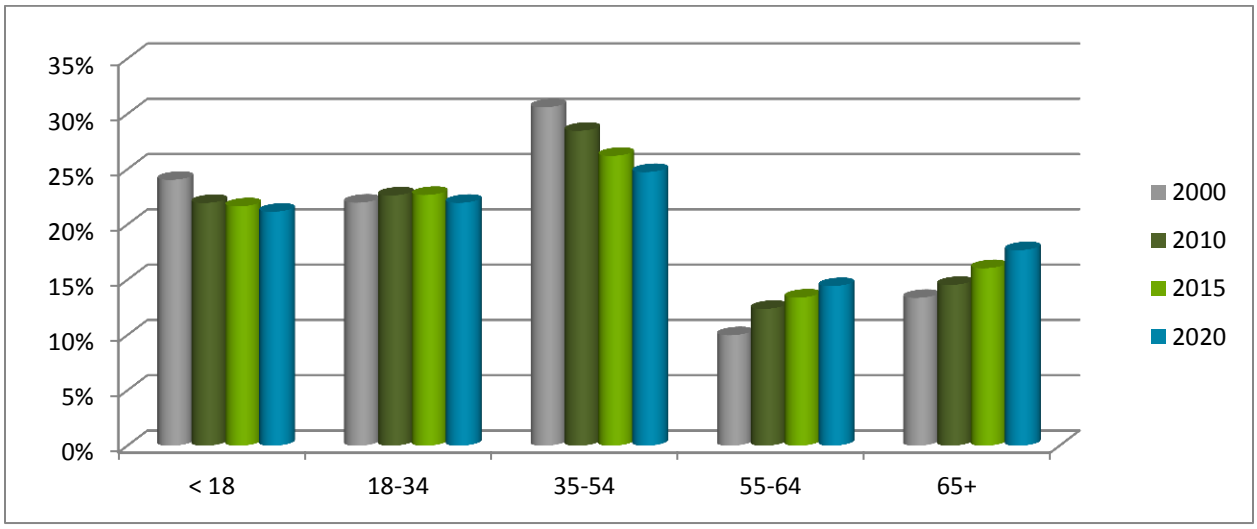
UZA	Population			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Fort Walton Beach—Navarre—Wright	152,741	191,917	198,138	25.7%	3.2%	29.7%
Panama City	132,419	143,280	148,316	8.2%	3.5%	12.0%
Pensacola	323,783	340,067	350,537	5.0%	3.1%	8.3%
Tallahassee	204,260	240,223	252,140	17.6%	5.0%	23.4%
Florida	13,472,012	16,446,202	17,136,063	22.1%	4.2%	27.2%

Source: U.S. Census and BEBR



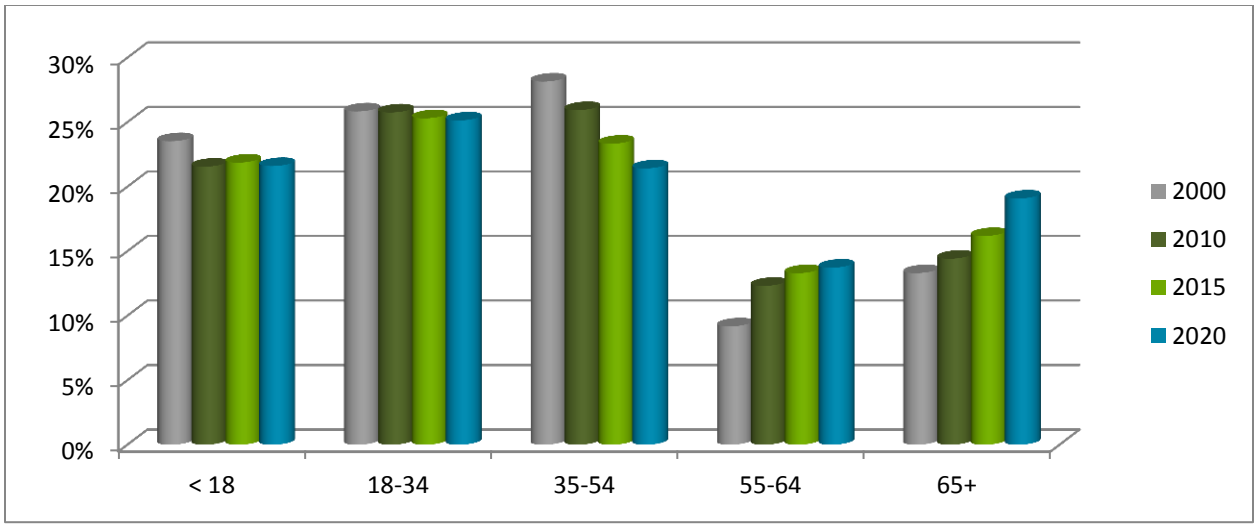
Source: U.S. Census and BEBR

Figure 31: FDOT District Three Relevant County Populations 2000 and 2010 Actual, 2015 and 2020 Projected



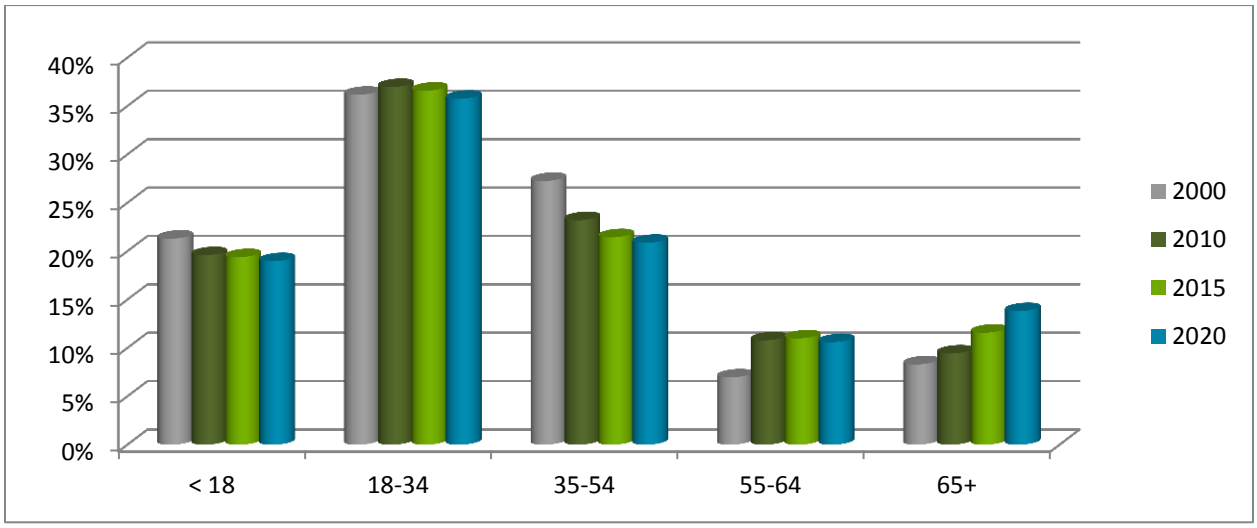
Source: U.S. Census and BEBR

Figure 32: Bay County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



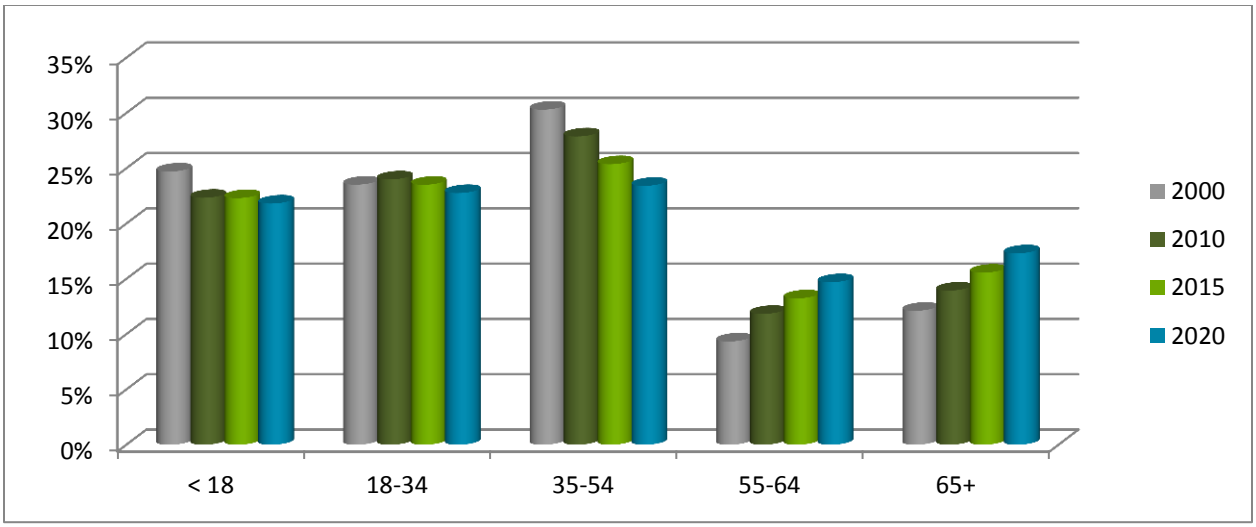
Source: U.S. Census and BEBR

Figure 33: Escambia County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



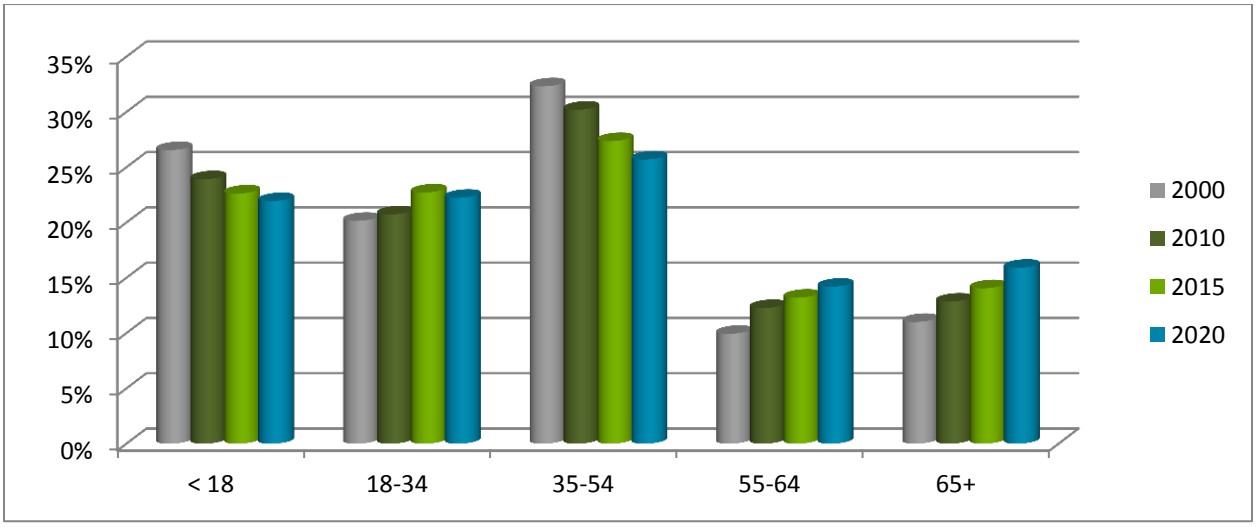
Source: U.S. Census and BEBR

Figure 34: Leon County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



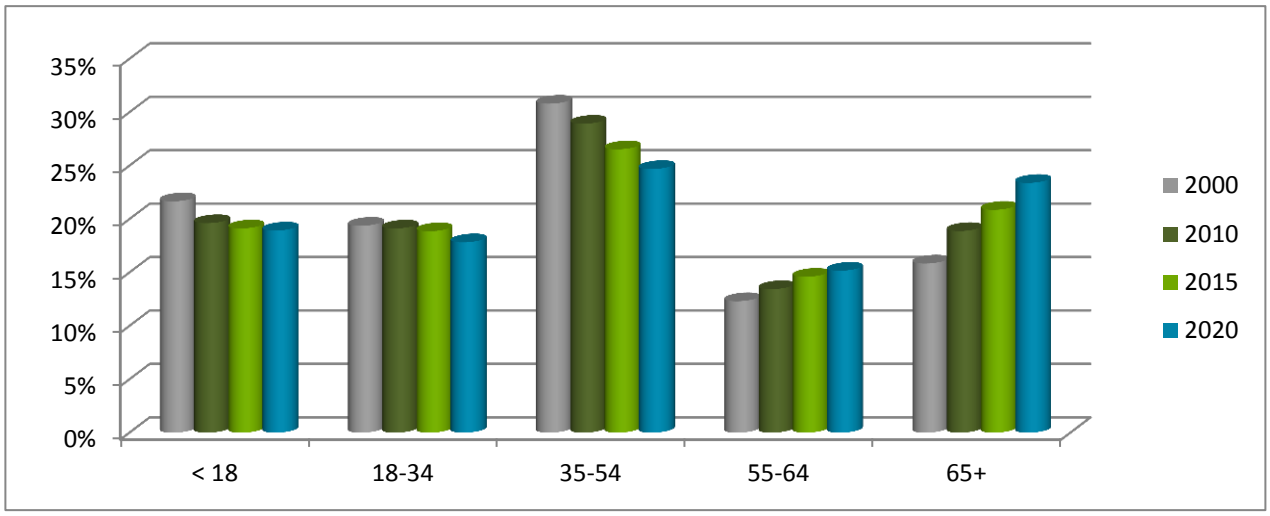
Source: U.S. Census and BEBR

Figure 35: Okaloosa County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 36: Santa Rosa County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 37: Walton County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected

Also as in previous sections, Table 8 presents information on the transit systems that operate in these UZAs in FDOT District Three. In 2000, only Okaloosa County's The Wave was not operating. Of particular note in Table 8 is the dramatic increase in Bay Town Trolley ridership from 2000 to 2010, especially when compared to the increase in service levels. For Escambia County Area Transit, service levels have been flat, yet ridership has decreased since 2000.

Table 8: Ridership and Service Supply for FDOT District Three Urban Transit Systems, 2000 and 2010

Agency	Passenger Trips			Revenue Miles		
	2000	2010	% Change	2000	2010	% Change
Bay Town Trolley (Panama City MPO)	66,482	724,613	990.0%	625,828	1,274,537	103.7%
Escambia County Area Transit (ECAT)	1,629,206	1,152,375	-29.3%	1,387,413	1,388,505	0.1%
Okaloosa County (The Wave)	n/a	162,820	n/a	n/a	3,241,809	n/a
StarMetro (City of Tallahassee)	3,922,150	4,762,233	21.4%	1,678,460	1,979,694	18.0%
District Three Total	5,617,838	6,802,041	21.1%	3,691,701	7,884,545	113.6%
Florida Total	191,899,369	245,192,620	27.8%	98,913,886	135,812,378	37.3%

Source: National Transit Database

FDOT Districts Four and Six

Because Miami- Dade Transit is the only urban transit system based in FDOT's District Six, this section combines the UZAs and transit agencies in Districts Four and Six. Figures 38 through 40 illustrate the UZAs associated with counties and transit agencies contained within these Districts. Additional graphics and narrative follow the maps in the figures.

FDOT District Six contains the Miami UZA (Broward, Miami-Dade, and Palm Beach Counties), and District Four contains the following two UZAs:

- Port St. Lucie (St. Lucie and Martin Counties)
- Sebastian-Vero Beach-Florida Ridge (Indian River, Brevard, and St. Lucie Counties)

Figure 38 presents the Miami UZA, which encompasses Miami-Dade, Broward, and Palm Beach Counties. The area is quite dense, and saw a smaller increase in population (11.9 percent) between 2000 and 2010 than did the state as a whole (17.6 percent), although there was an increase in the land area of the UZA during this time. In Chapter 1, it was stated that the Miami-Fort Lauderdale-Pompano Beach MSA is the eighth most populous MSA in the U.S. as of 2010. In 2017, the Miami UZAs population is expected to be 5,684,677. There is a relatively high share of younger people in the UZA, as also shown in Figure 38; however, the percentage of those aged 65 and over is predicted to grow between 2010 and 2017. Interestingly, and also as shown in Figure 43 on page 85 and discussed in Chapter 2, Broward County, which is included in the Miami UZA, lost some of its population of those aged 65 and over between 2000 and 2010.

The number of zero-car households actually declined in the Miami UZA from 2000 to 2010, and the relatively high use of public transportation for the work commute increased during this time, according to Figure 38. It should be noted that the percentage of people indicating that they use public transportation for the work commute is the highest in Florida, at nearly four percent. The Miami UZA is served by four large transit systems, including the multimodal Miami-Dade Transit, which also operates a heavy rail system (Metrorail) and a peoplemover system (Metromover) in addition to its Metrobus system; Broward County Transit; Palm Tran in Palm Beach County; and the Tri-Rail commuter rail system which spans all three counties.

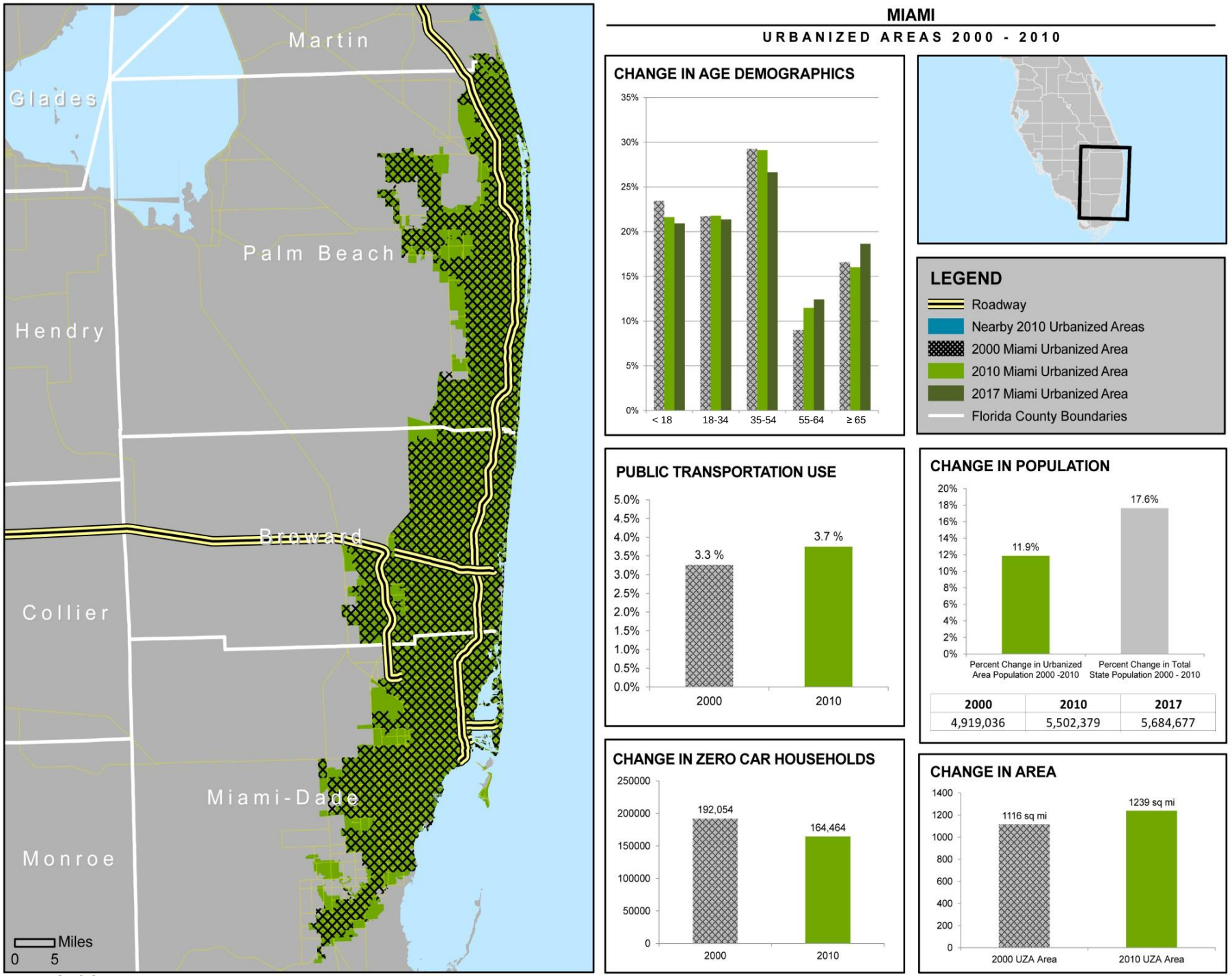


Figure 38: Miami Urbanized Area, 2000 – 2010

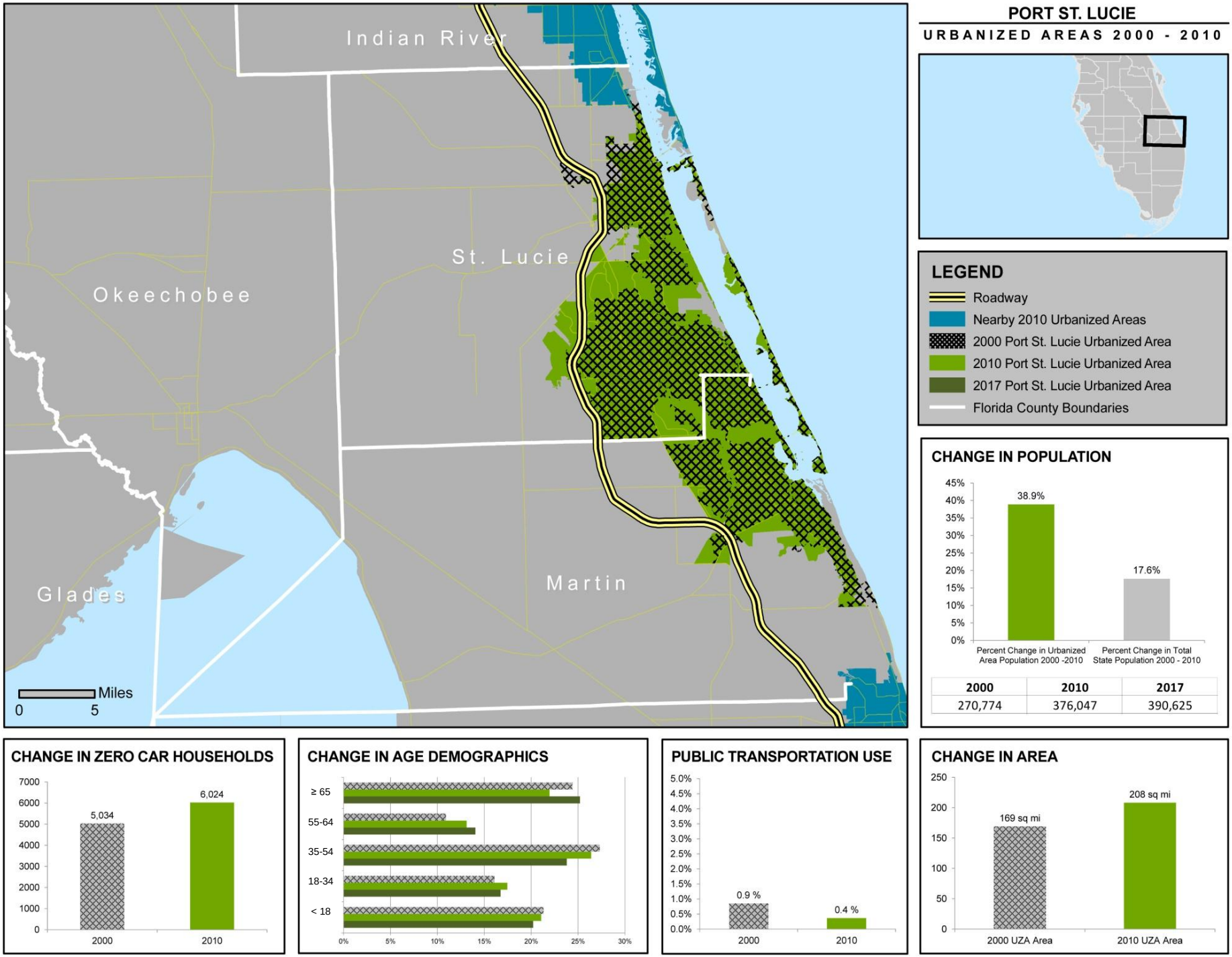


Figure 39: Port St. Lucie Urbanized Area, 2000 – 2010

The Port St. Lucie UZA is depicted in Figure 39, which spans St. Lucie and Martin Counties. The UZA population increased significantly, nearly 39 percent, between 2000 and 2010, accompanied by an increase in the area from 169 square miles in 2000 to 208 square miles in 2010. In 2017, the population is expected to grow an additional 4 percent to 390,625. Zero-car households grew, while public transportation use for the work commute declined slightly between 2000 and 2010.

Figure 39 also shows that, although the percentage of those aged 18 to 34 is projected to fall slightly from 2010 to 2017, it will still be higher than the level in 2000. Further, there is a high share of those aged 65 and over, and it is expected to increase in the coming years.

Figure 40 indicates that the Sebastian-Vero Beach-Florida Ridge UZA is contained primarily within Indian River County. The population of this UZA increased nearly 24 percent while its land area grew by 16 square miles between 2000 and 2010 and, by 2017, the population is projected to be 156,034. Though the number of zero-car households increased between 2000 and 2010, public transportation use for the work commute is low; there is a relatively small transit system (GoLine) that operates in Indian River County.

Also shown in Figure 40 is that the Sebastian-Vero Beach-Florida Ridge UZA has a high share of those aged 65 and over. This share of older people is expected to continue to grow from 2010 to 2017.

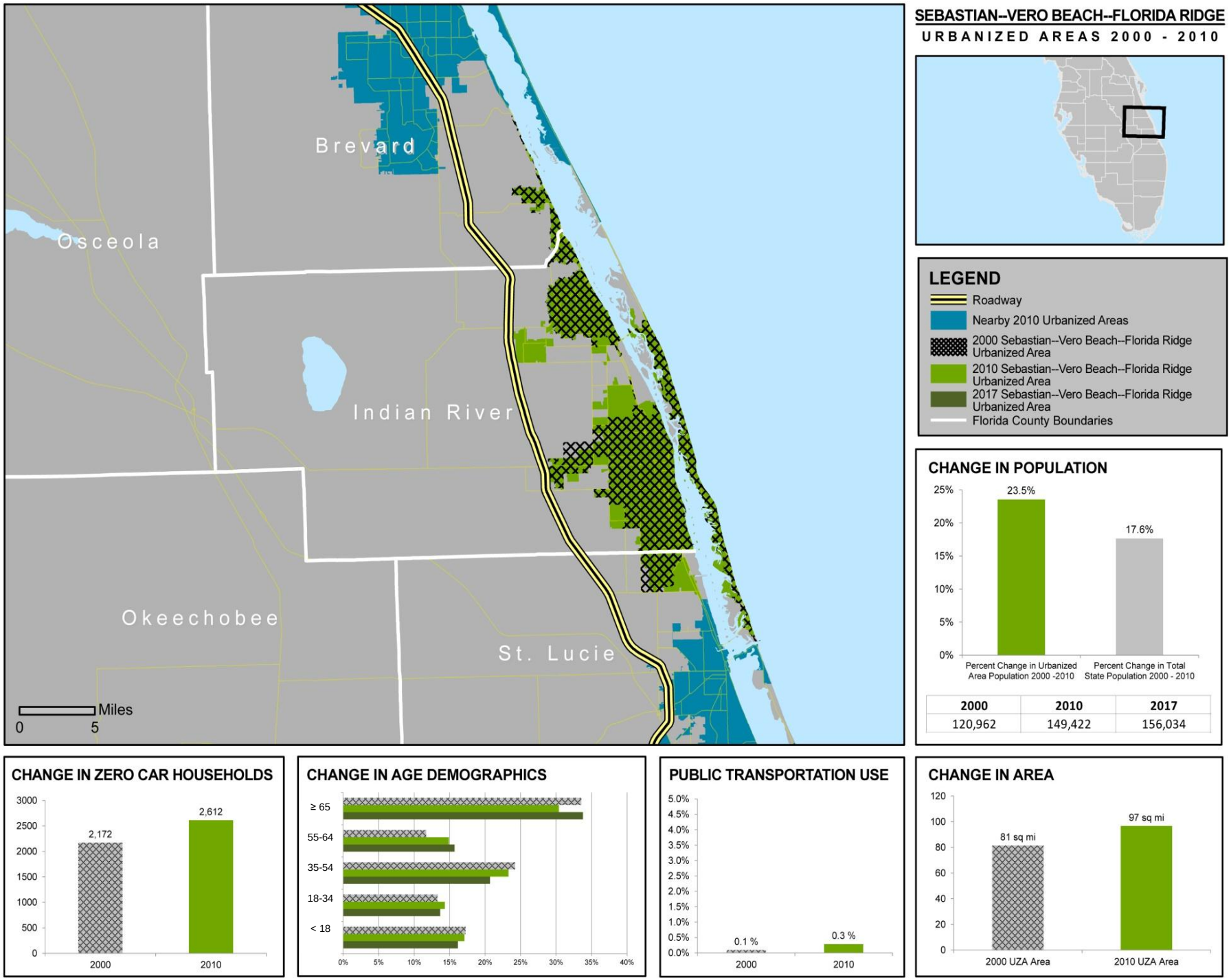


Figure 40: Sebastian-Vero Beach-Florida Ridge Urbanized Areas, 2000 – 2010

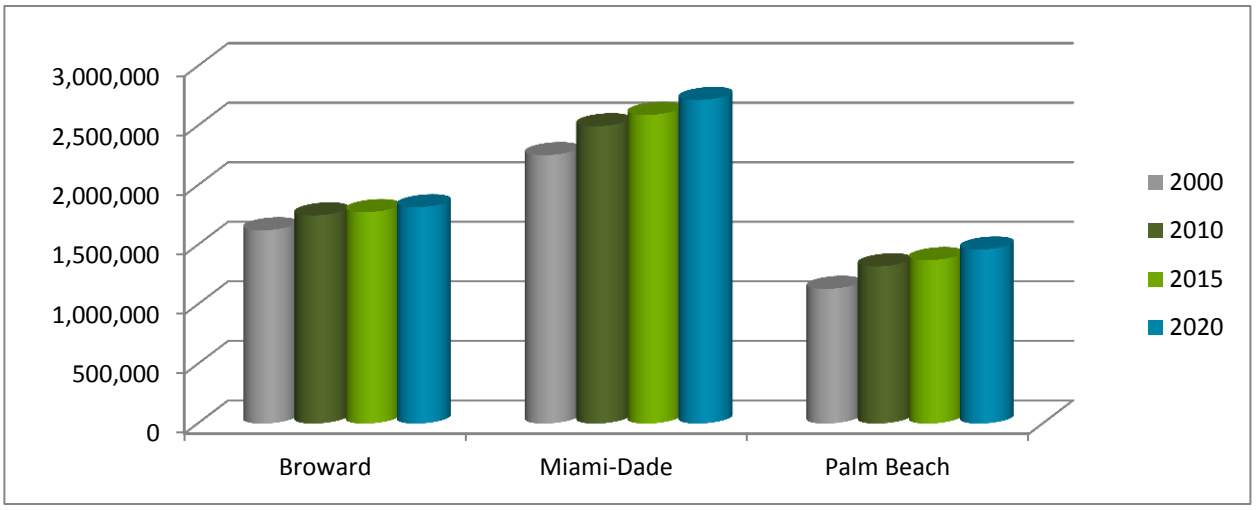
Table 9 presents the population information for these UZAs, as well as for the state as a whole. The Port St. Lucie UZA grew the fastest, at nearly 39 percent between 2000 and 2010, and with a projected growth rate of 44 percent between 2000 and 2017. The Miami UZA, already quite populous, still grew nearly 12 percent between 2000 and 2010. Figures 41 and 42 also reflect the trends in the counties associated with these UZAs. Because of the scale of the three larger counties, Broward, Palm Beach, and Miami-Dade, they are shown separately in Figure 41 while the remaining three counties are shown in Figure 42, both on the next page.

Figures 43 through 48 on the following pages provide the actual and projected age distributions for the counties associated with these three UZAs for 2000, 2010, 2015, and 2020. Interestingly, the distribution patterns for each of the counties look quite similar. The counties appear to be holding steady or slightly increasing the shares of younger people, while also increasing the share of those 65 years of age and older. This is offset by significant declines in the share of the population age 35 to 54 in the coming years.

Table 9: Population Trends and Projections, FDOT District Four and Six UZAs and Florida

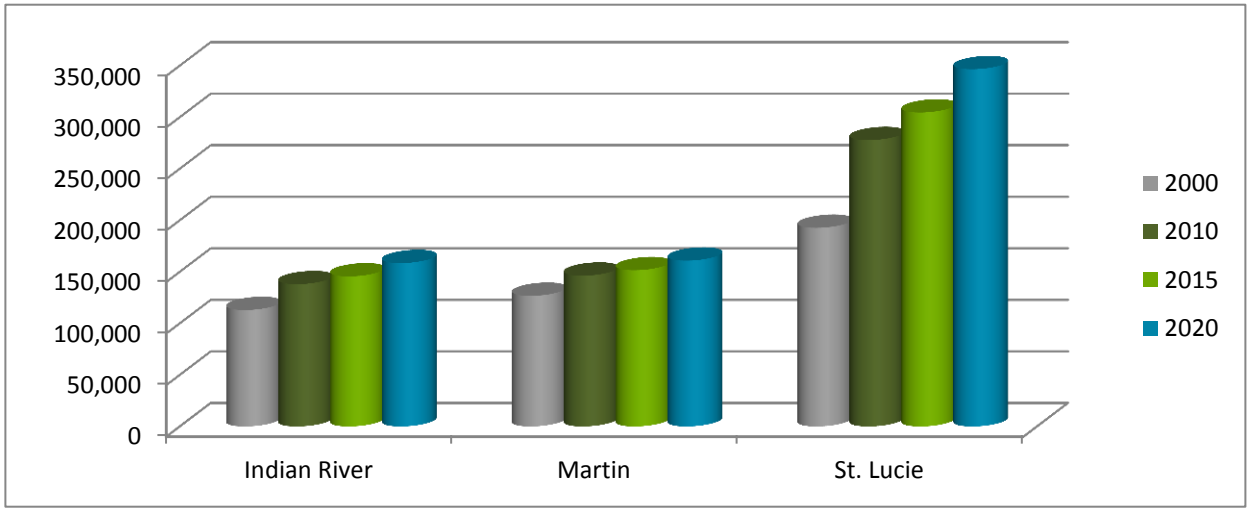
UZA	Population			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Miami	4,919,036	5,502,379	5,684,677	11.9%	3.3%	15.6%
Port St. Lucie	270,774	376,047	390,625	38.9%	3.9%	44.3%
Sebastian—Vero Beach—Florida Ridge	120,962	149,422	156,034	23.5%	4.4%	29.0%
Florida	13,472,012	16,446,202	17,136,063	22.1%	4.2%	27.2%

Source: U.S. Census and ESRI



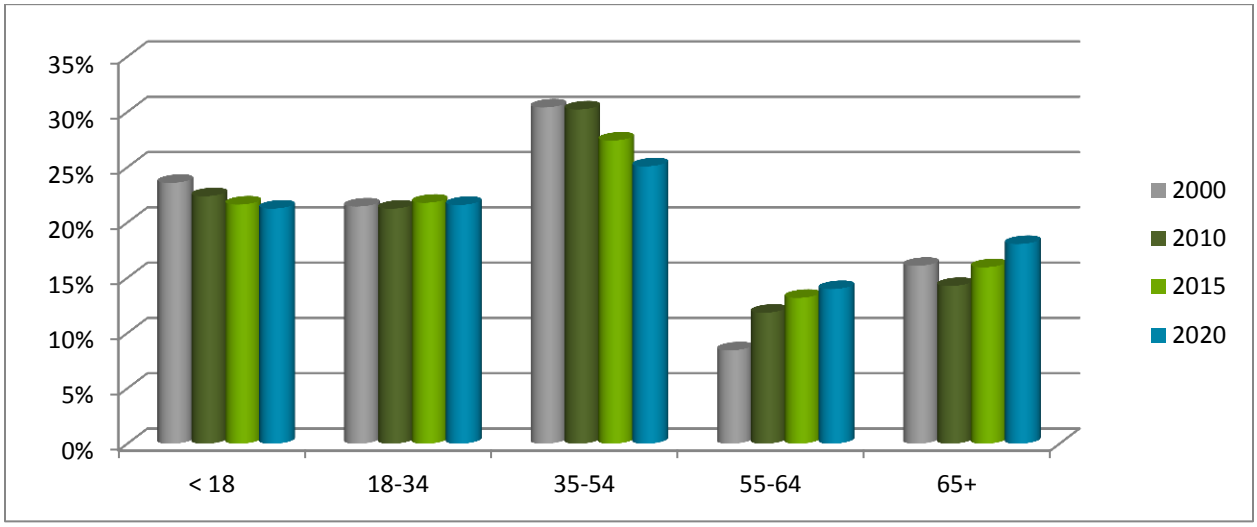
Source: U.S. Census and BEBR

Figure 41: FDOT District Six Relevant County Populations 2000 and 2010 Actual, 2015 and 2020 Projected



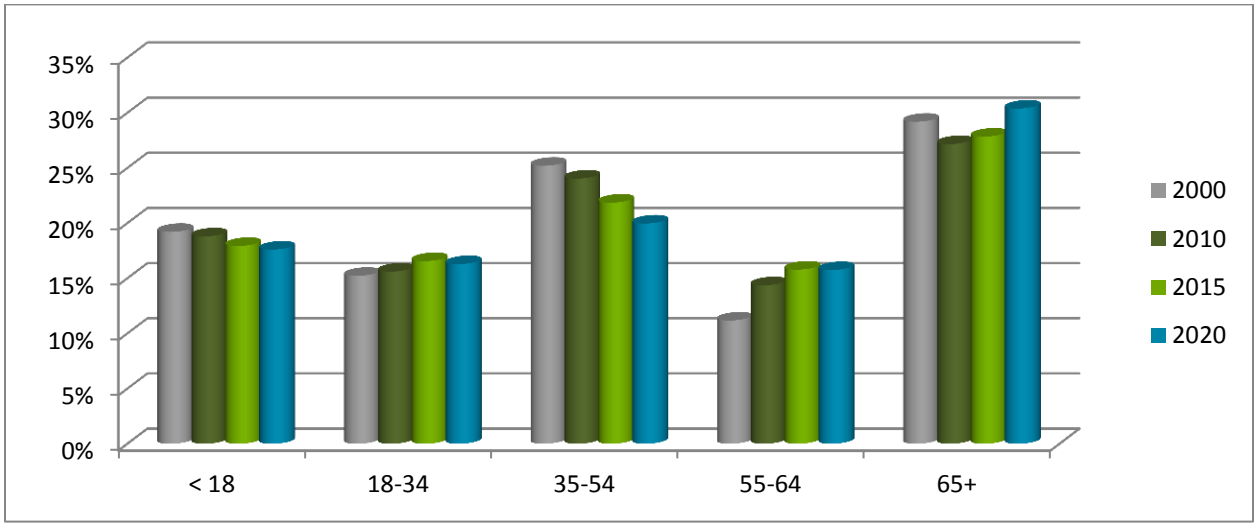
Source: U.S. Census and BEBR

Figure 42: FDOT District Four Relevant County Populations 2000 and 2010 Actual, 2015 and 2020 Projected



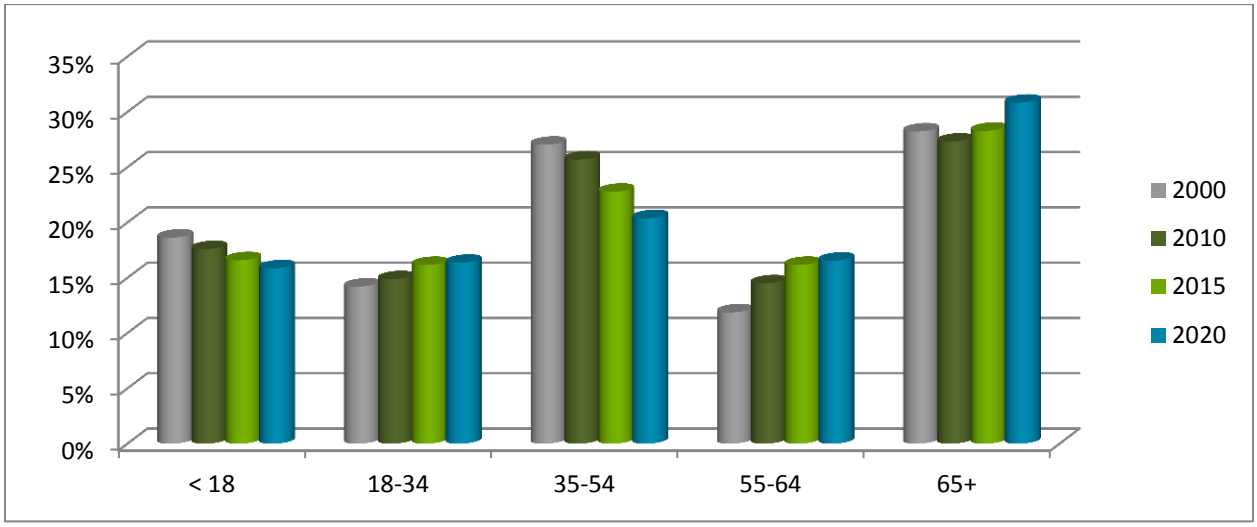
Source: U.S. Census and BEBR

Figure 43: Broward County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



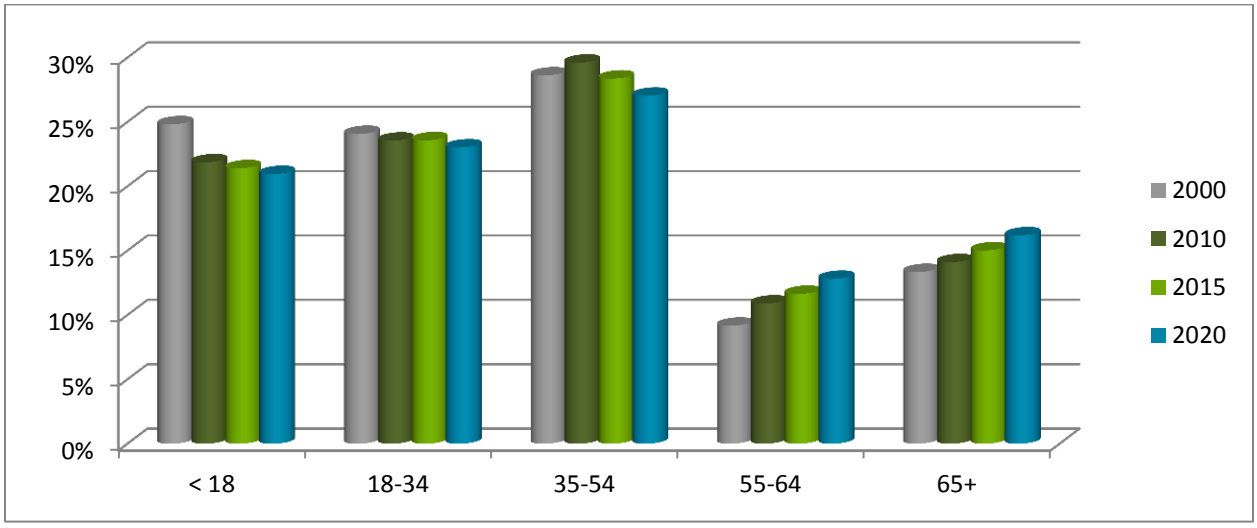
Source: U.S. Census and BEBR

Figure 44: Indian River County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



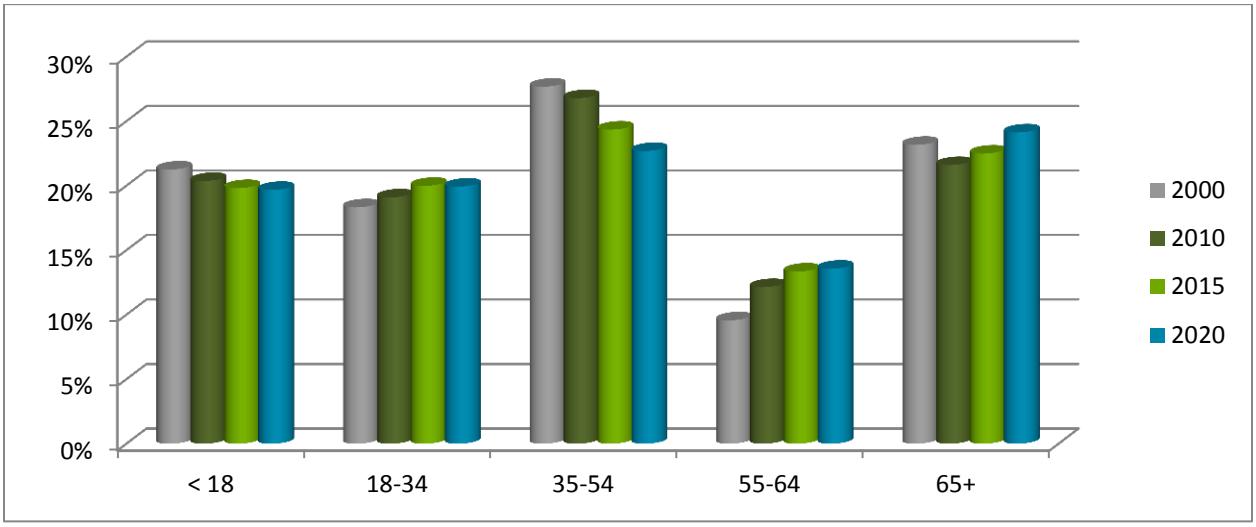
Source: U.S. Census and BEBR

Figure 45: Martin County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



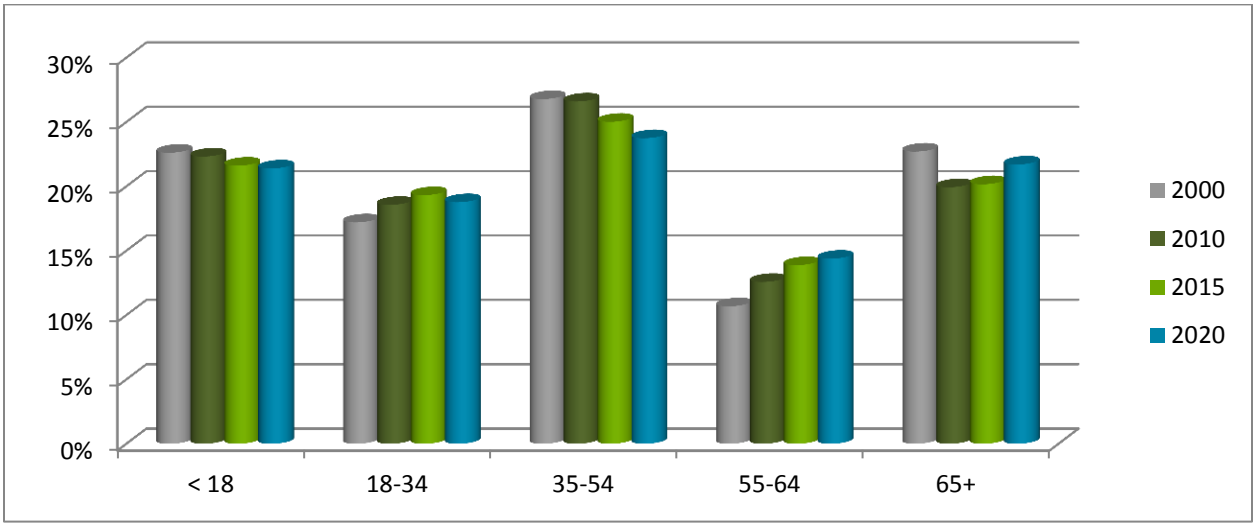
Source: U.S. Census and BEBR

Figure 46: Miami-Dade County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 47: Palm Beach County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 48: St. Lucie County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected

Table 10 below provides data on the seven urban fixed-route transit systems that operate in FDOT Districts Four and Six. In 2000, the transit systems in Martin County and St. Lucie County were not yet operating. Today those two systems are relatively small, as is the GoLine system in Indian River County, which has seen significant growth since 2000. Ridership in Broward County has increased by one-third since 2000, and ridership on Tri-Rail's commuter rail system has grown more than 80 percent between 2000 and 2010, accompanied by a similar increase in the level of service, as measured by revenue miles. Interestingly, Palm Tran has experienced a 60 percent increase in ridership between 2000 and 2010, and yet service levels have remained flat during this time.

Table 10: Ridership and Service Supply for FDOT Districts Four and Six Urban Transit Systems, 2000 and 2010

Agency	Passenger Trips			Revenue Miles		
	2000	2010	% Change	2000	2010	% Change
Broward County Transit (BCT) & Community Bus	29,073,676	38,670,324	33.0%	12,013,192	16,372,108	36.3%
Indian River County (GoLine Transit)	153,768	707,402	360.1%	226,524	564,322	149.1%
Martin County	n/a	4,626	n/a	n/a	67,278	n/a
Miami-Dade Transit (MDT)	84,131,473	96,285,797	14.5%	31,187,342	40,255,102	29.1%
Palm Tran (Palm Beach County)	6,463,416	10,343,531	60.0%	6,966,949	6,954,202	-0.2%
St. Lucie Council on Aging	n/a	173,250	n/a	n/a	336,477	n/a
Tri-Rail (S. FL Regional Transportation Authority)	2,232,497	4,050,353	81.4%	1,819,317	3,368,257	85.1%
District Four & Six Total	122,054,830	150,235,283	23.1%	52,213,324	67,917,746	30.1%
Florida Total	191,899,369	245,192,620	27.8%	98,913,886	135,812,378	37.3%

Source: National Transit Database

FDOT District Five

Figures 49 through 57 illustrate the UZAs associated with counties and transit agencies contained within FDOT's District Five. Additional graphics and narrative follow the maps in the figures.

FDOT District Five contains the following UZAs:

- Deltona (Volusia County)
- Kissimmee (Orange and Osceola Counties)
- Lady Lake-The Villages (Marion, Lake, and Sumter Counties)
- Leesburg-Eustis-Tavares (Lake and Sumter Counties)
- Ocala (Marion County)
- Orlando (Orange, Seminole, Osceola, and Lake Counties)
- Palm Bay-Melbourne (Brevard County)
- Palm Coast-Daytona Beach-Port Orange (Volusia and Flagler Counties)
- Titusville (Brevard County)

The Deltona UZA, shown in Figure 49, is located in western Volusia County. It increased by 6 square miles between 2000 and 2010, and experienced a growth in population of 23 percent during this time frame (147,713 to 182,169). This UZA is expected to grow only very slightly from 2010 to 2017, to 183,705. Both the number of zero-car households and the use of public transportation for the work commute have increased slightly from 2000 to 2010. Further, by 2017, the Deltona UZA will have slightly fewer percentages of those in the younger age cohorts and higher percentages of those in the older age cohorts.

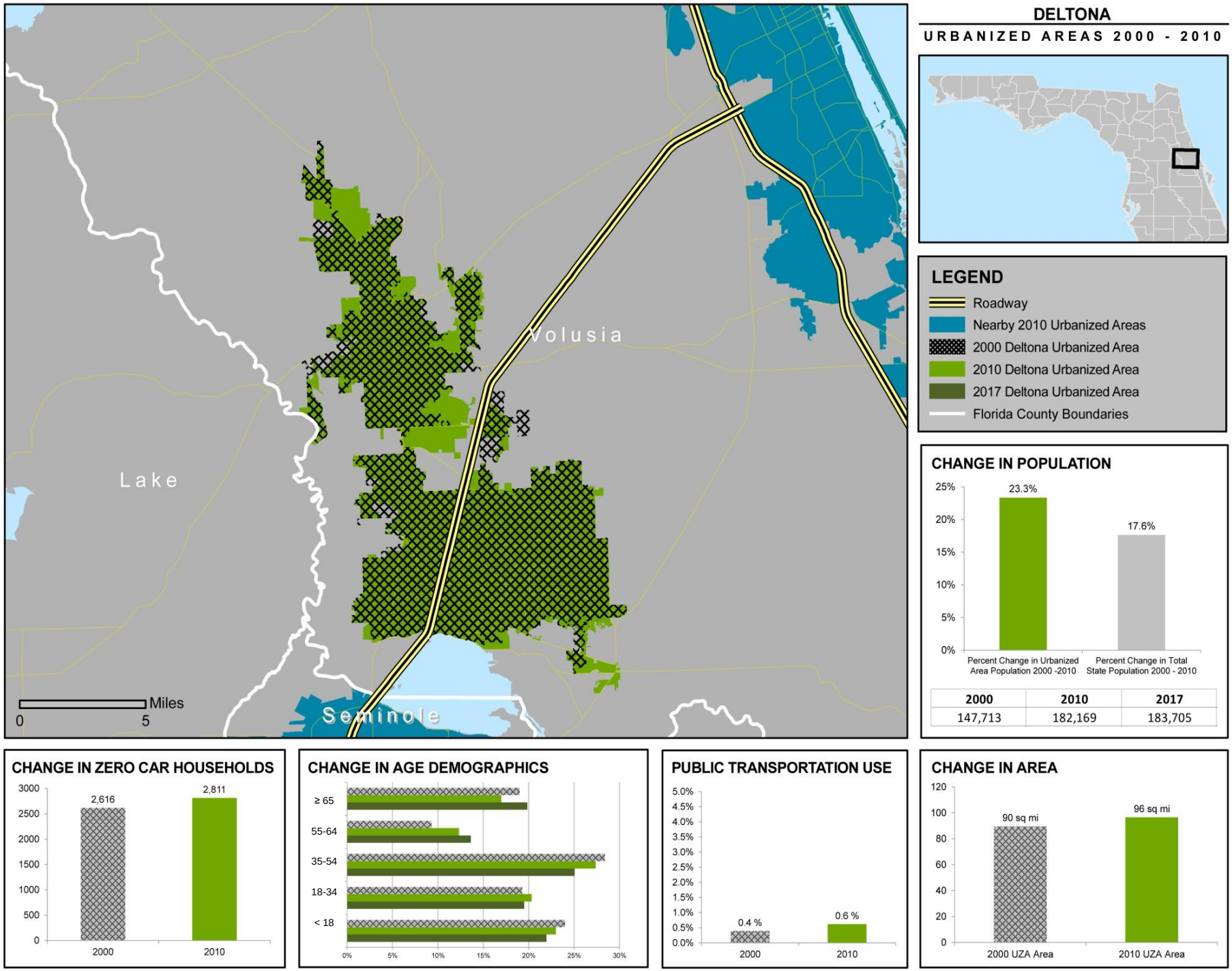


Figure 49: Deltona Urbanized Area, 2000 – 2010

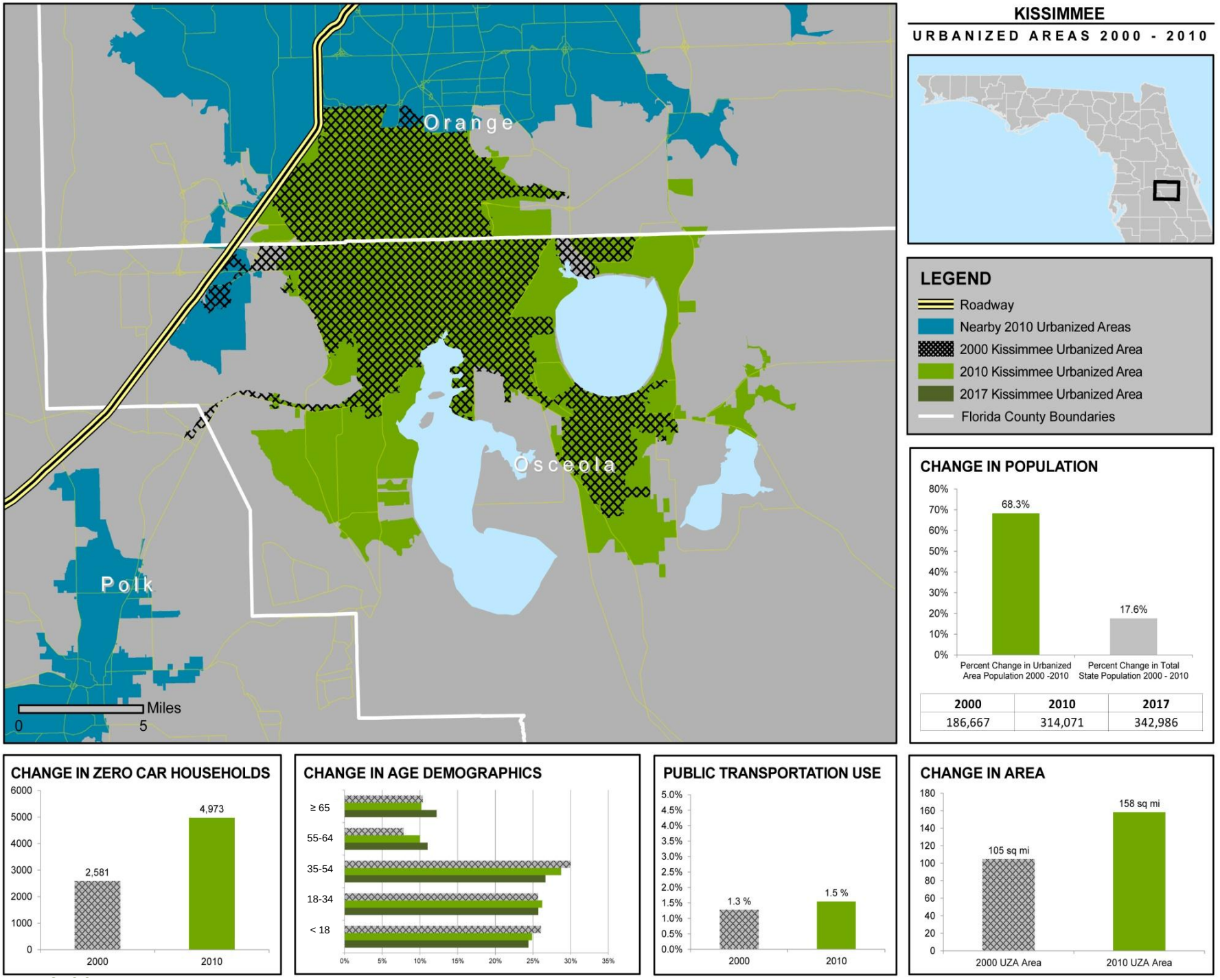


Figure 50: Kissimmee Urbanized Area, 2000 – 2010

The Kissimmee UZA, illustrated in Figure 50, grew significantly between 2000 and 2010, both in terms of land area (an increase of 53 square miles) and population (an increase of 68.3 percent). The UZA is located in both Osceola and Orange Counties, and has experienced most of its growth to the south and east. This UZA is projected to grow more than 9 percent from 2010 to 2017, to 342,986. Public transportation use for the work commute has grown since 2000, and the number of zero-car households has increased significantly. The Kissimmee UZA has relatively lower shares of older people and relatively higher shares of younger people. However, there are projected to be increases in the percentage of those aged 55 to 64 and 65 and over for 2017.

Figure 51 presents the Lady Lake-The Villages UZA, which has grown significantly from 2000 to 2010, both in terms of land area and population. The population of this UZA has increased nearly 123 percent since 2000. From the map it is clear that nearly all of the UZA growth occurred to the southwest in Sumter County. In Chapter 2, it was noted that Sumter County is eighth on the list of top ten fastest-growing counties in the U.S. between 2000 and 2010, and also has one of the fastest-increasing populations of senior citizens. (see Figures 58 and 66). Most are likely living in the set of retirement communities known as The Villages. Interestingly, while current seniors are moving to places like The Villages in high numbers, the review of trends in the literature and data from Chapter 2 indicated that the next youngest age cohort, the Baby Boomers, will not be as attracted to places such as The Villages. It is expected that many will prefer to age in place, or at least not move to isolate themselves among other elderly. It will be interesting to see if this trend comes to fruition and whether it persists.

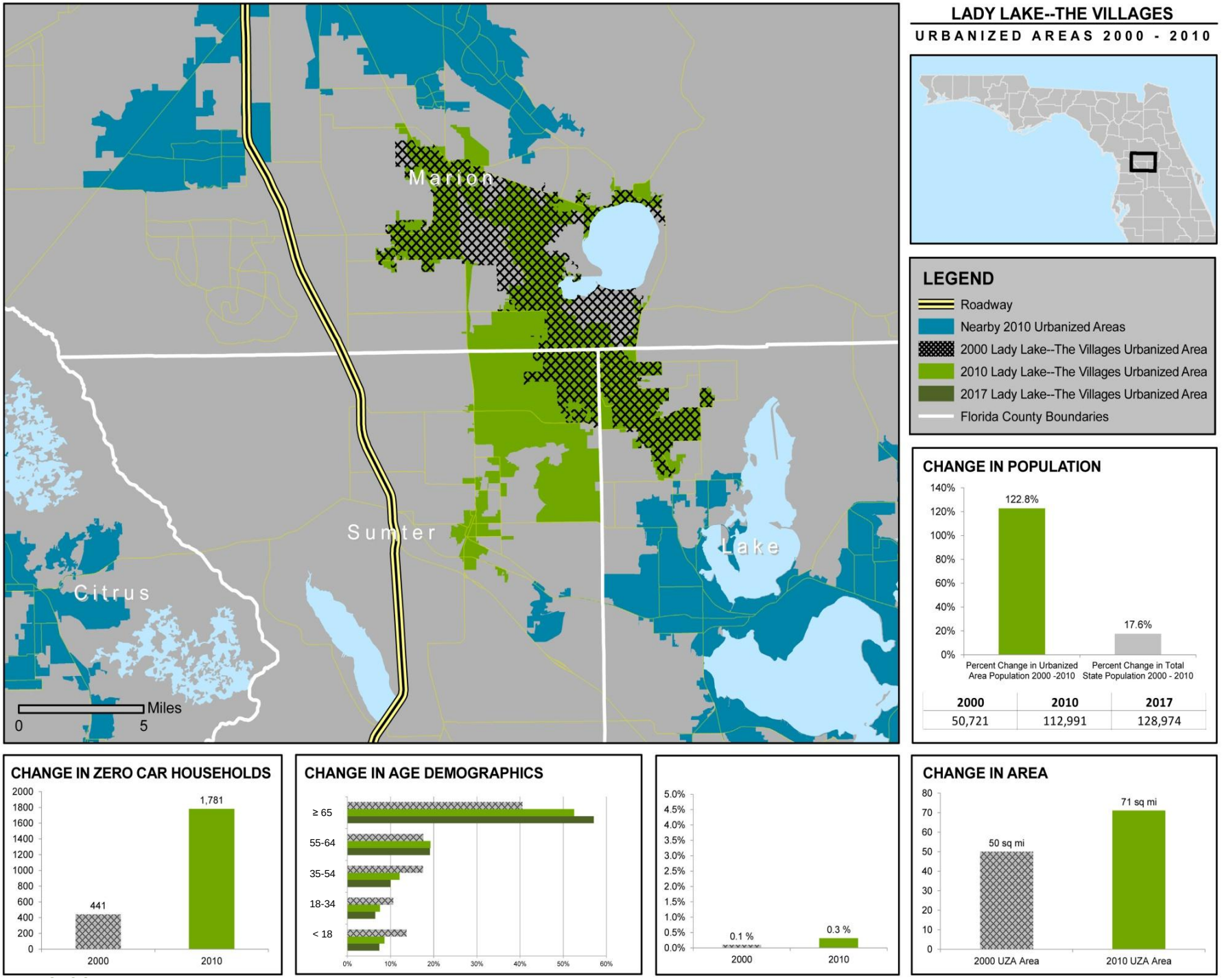


Figure 51: Lady Lake-The Villages Urbanized Area, 2000 – 2010

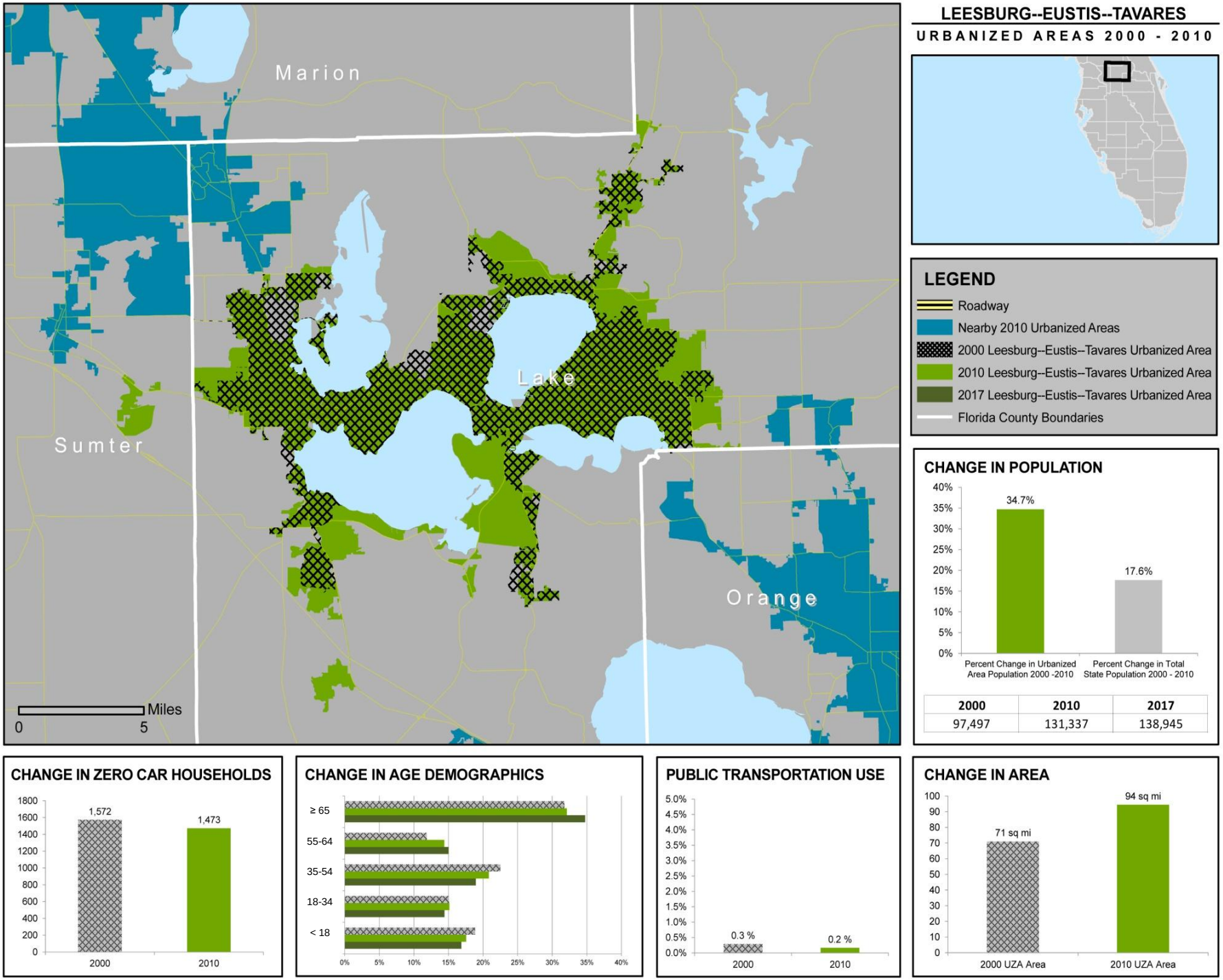


Figure 52: Leesburg-Eustis-Tavares Urbanized Area, 2000 – 2010

Figure 52 depicts the Leesburg-Eustis-Tavares UZA located in Lake County. It is clear from the information in the figure that the UZA has expanded in size as well as population from 2000 to 2010. The UZA is characterized by a relatively older population, and the number of zero-car households has declined since 2000. Public transportation use for the work commute is low; the LakeXpress transit system in the County began operations in 2007.

Marion County contains the Ocala UZA, as shown in Figure 53. The UZA has increased from 89 square miles in 2000 to 112 square miles in 2010, while its population has grown more than 47 percent during this time. Public transportation use for the work commute is quite low; there is a small transit system, SunTran, which operates in the area. SunTran received a small-systems NTD reporting waiver from FTA in 2010, and so no data are available for that year in Table 12 at the end of this section.

Both Figures 52 and 53 show that both the Leesburg-Eustis-Tavares UZA and the Ocala UZA have relatively low percentages of those aged 18 to 34. In both, the percentage of those aged 65 and older is projected to increase significantly from 2010 to 2017.

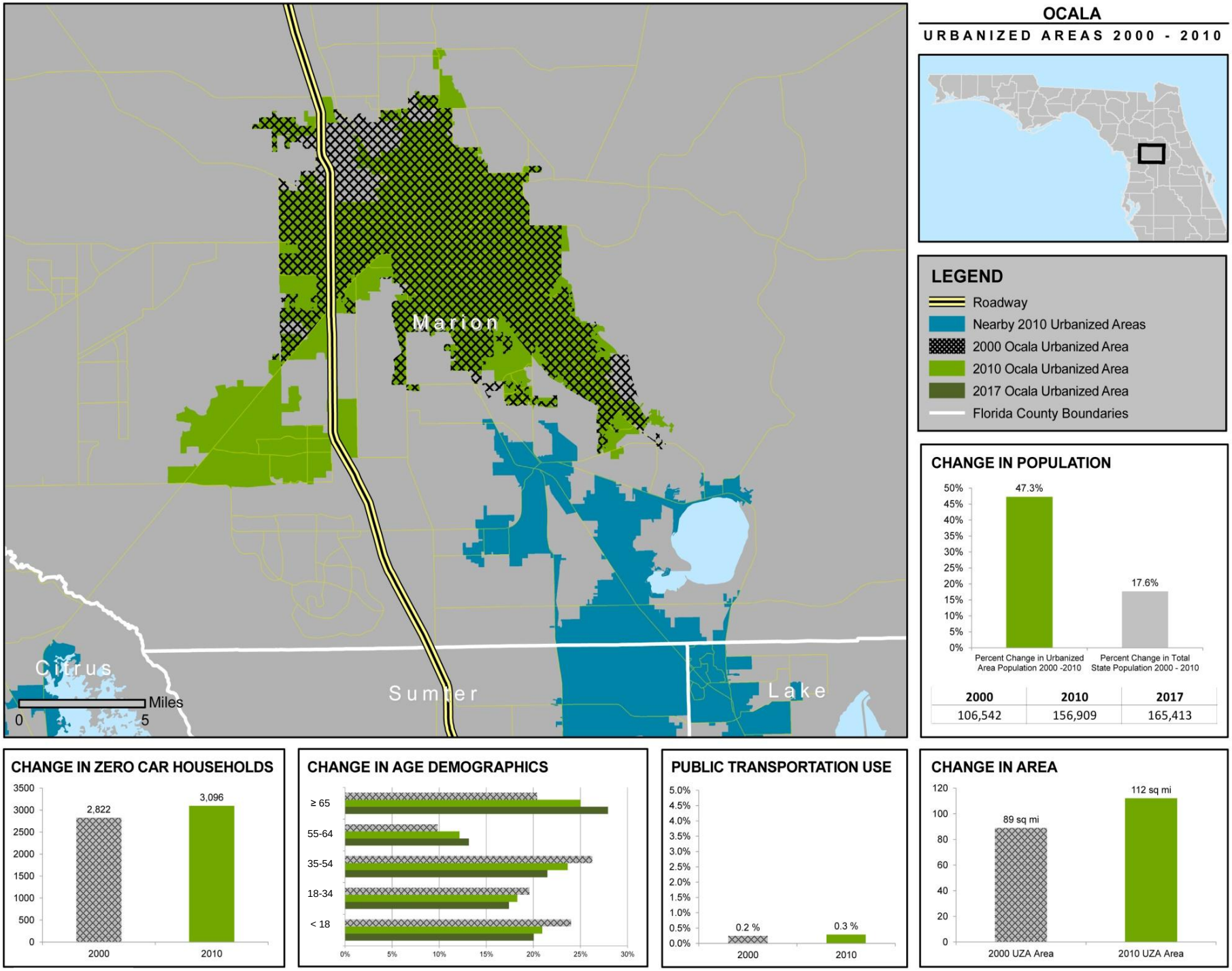


Figure 53: Ocala Urbanized Area, 2000 – 2010

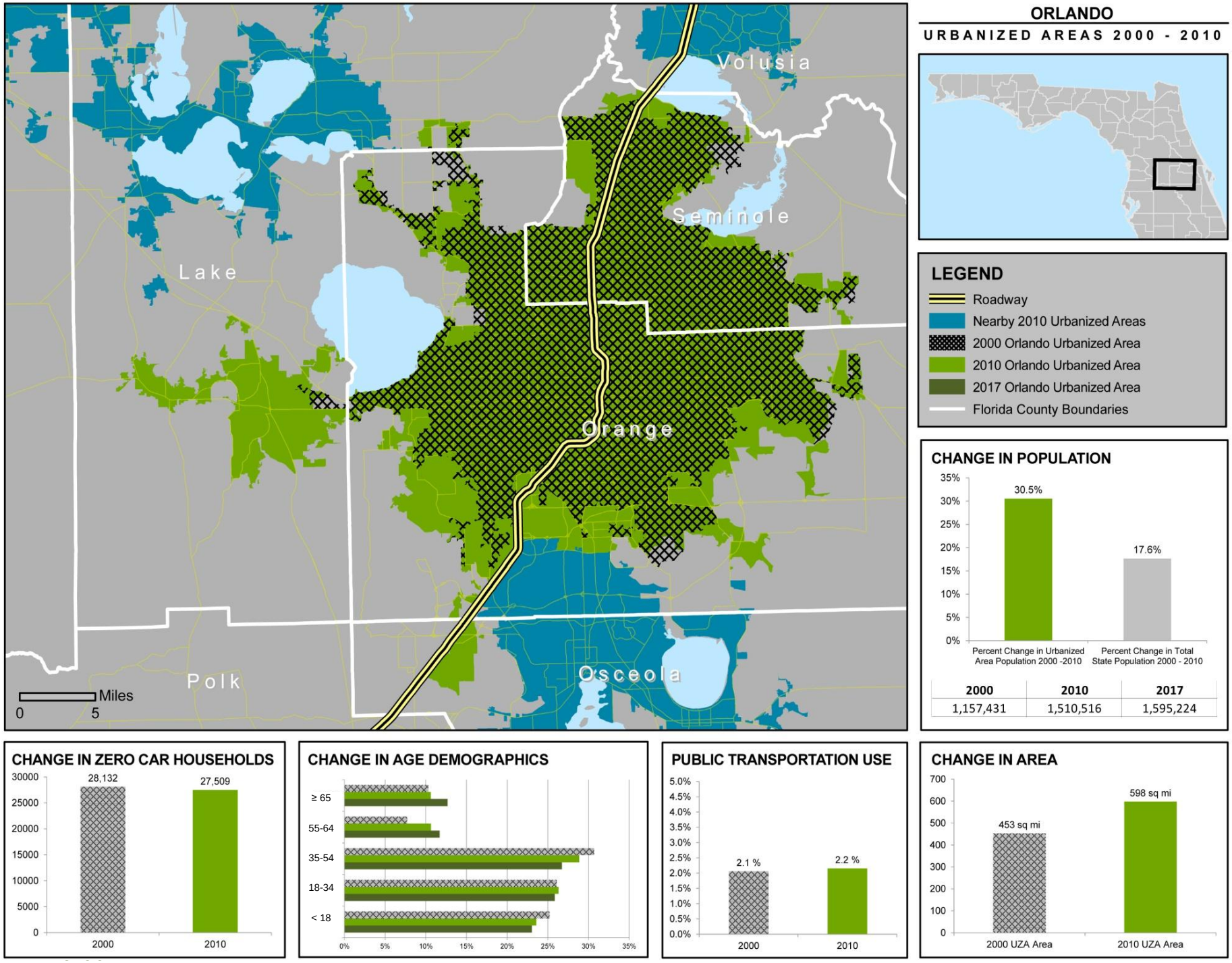


Figure 54: Orlando Urbanized Area, 2000 – 2010

The Orlando UZA spans Orange and Seminole Counties, and has expanded west into Lake County and even a small part of Osceola County in 2010. Figure 54 on the previous page indicates that the population of the Orlando UZA has grown approximately 30 percent between 2000 and 2010, from 1,157,431 to 1,510,516. The projected population in 2017 is 1,595,224, which is approximately 6 percent higher than in 2010. Public transportation use for the work commute is relatively high and has increased slightly since 2000. The Lynx transit system operates in the Orlando area; data for this system are shown in Table 12 near the end of this section.

In Chapter 2, it was noted that the Orlando-Kissimmee area experienced a 26 percent increase in those younger than age 45 from 2000 to 2010, which was the fifth fastest in the U.S. Figure 54 does show a relatively higher share of younger people and a relatively lower share of older people; however, the percentage of those aged 55 and above is expected to increase over the next several years to 2017.

The Palm Bay-Melbourne UZA is located in Brevard County along the eastern coast of Florida. According to Figure 55, the population of this UZA has increased 15.1 percent from 2000 to 2010, a rate slightly less than the 17.6 percent increase in Florida's total population during this time. Its population is expected to be 464,421 in 2017, an approximate 3 percent increase. The number of zero-car households has increased significantly over this time frame, and public transportation use for the work commute has increased slightly.

The Palm Bay-Melbourne-Titusville area was also mentioned in Chapter 2 as one of the top ten areas in the U.S. with the highest proportions of those aged 65 and over. For this UZA, 2017 projections indicate that the shares of younger people will fall while the shares of older people will rise.

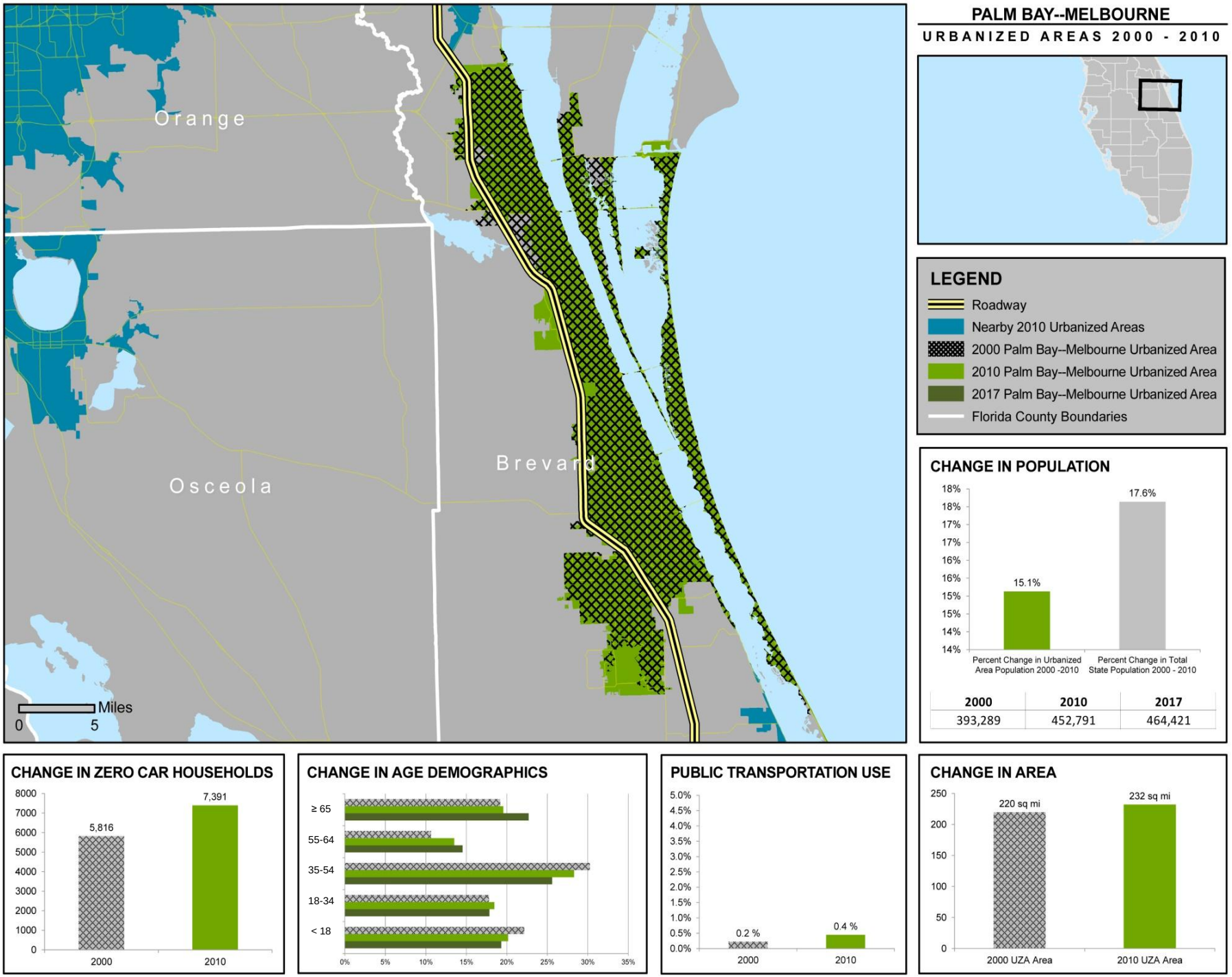


Figure 55: Palm Bay-Melbourne Urbanized Areas, 2000 – 2010

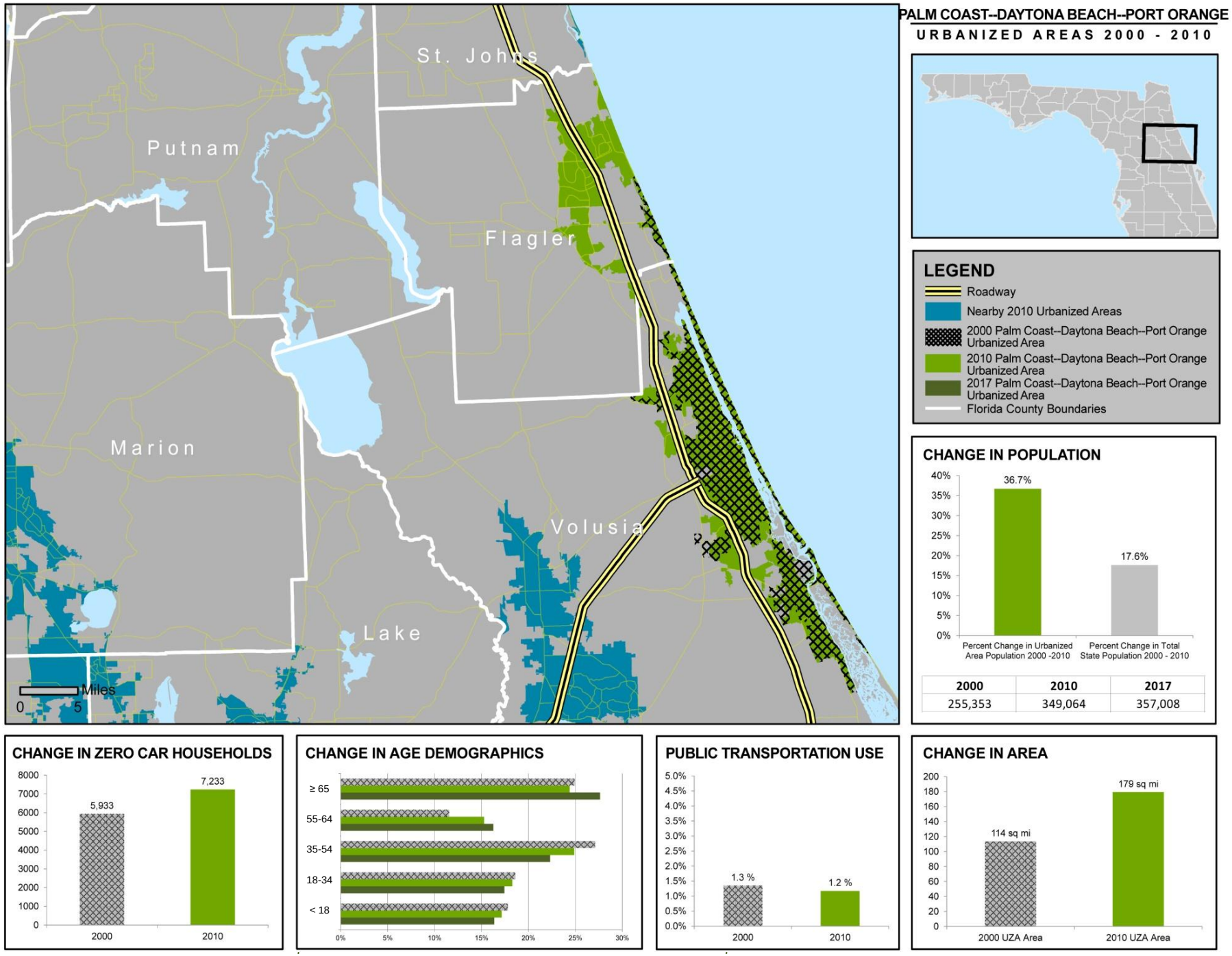


Figure 56: Palm Coast-Daytona Beach-Port Orange Urbanized Area, 2000 – 2010

The Palm Coast-Daytona Beach-Port Orange UZA is primarily located in Volusia County but has expanded northward into Flagler County in 2010, as illustrated in Figure 56. The UZA population has increased nearly 37 percent between 2000 and 2010 and, while zero-car households have increased, the percentage of people in the UZA reporting that they use public transportation for work actually declined slightly. This is likely due to the expansion of the UZA into an area (Flagler County) not currently served by VOTRAN, which operates transit services in Volusia County.

As mentioned previously in Chapter 1, Flagler County was the third fastest growing county in the U.S. between 2000 and 2010, having grown 92 percent during that time. In addition, the Palm Coast MSA was the fastest growing MSA in the U.S. between 2000 and 2010. This growth is expected to level off in the coming years, however.

Figure 56 also indicates that the Palm Coast-Daytona Beach-Port Orange UZA has a relatively large share of those aged 65 and above. The percentage of elderly in the UZA is projected to increase in 2017.

Figure 57 indicates that the Titusville UZA is located in the northern portion of Brevard County. Information in the figure shows that this UZA actually experienced a net decline in land area between 2000 and 2010 (a decrease of two square miles). The UZA population grew just under 3 percent from 2000 to 2010, but is expected to grow nearly 4 percent from 2010 to 2017, to 56,506. There is virtually no public transportation use in this UZA, which may be located outside the service area of Space Coast Area Transit, which operates in the UZA to the south. As discussed previously in this section and in Chapter 2, the Palm Bay-Melbourne-Titusville area was among the top ten in the U.S. with the highest percentage of those aged 65 and above, and this trend is expected to continue.

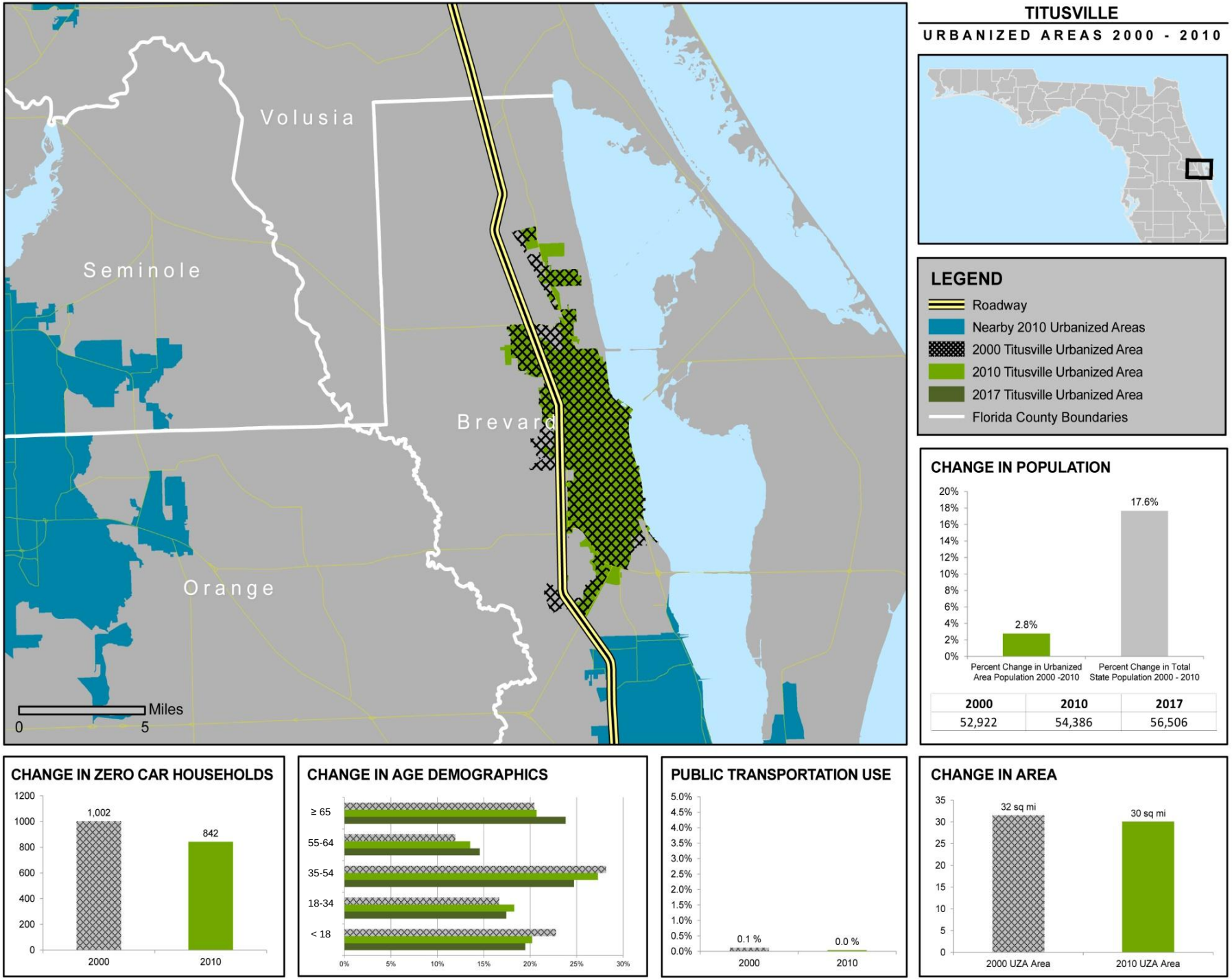


Figure 57: Titusville Urbanized Area, 2000 – 2010

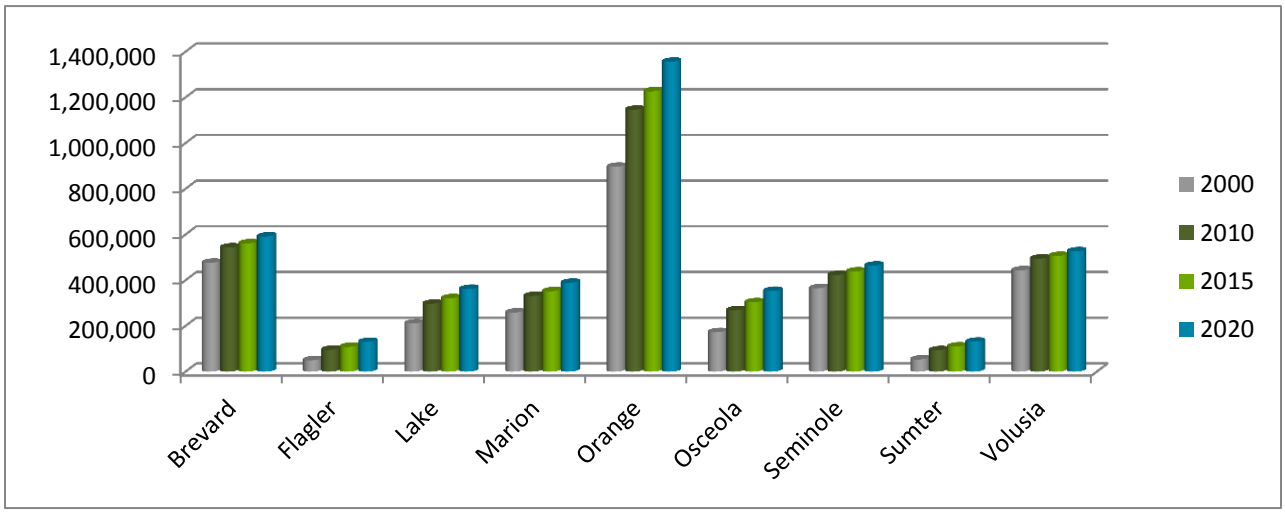
Table 11 includes 2000, 2010, and projected 2017 population information for these nine UZAs. The most notable increase is the nearly 123 percent growth in the Lady Lake-The Villages UZA from 2000 to 2010, which is primarily the result of the UZA's expansion into Sumter County. Other rapidly growing UZAs include Kissimmee and Ocala. Figure 58 on the next page shows population trends for the counties associated with the nine UZAs in FDOT's District Five. Orange County grew rapidly from 2000 to 2010, which contributed to the nearly 31 percent increase in the Orlando UZA during this time.

Figures 59 through 67 on the following pages show age demographics, both actual and projected, of the counties that contain the UZAs described in this section. Orange and Osceola Counties have the largest percentages of younger people, while Marion, Volusia, and Lake Counties have relatively older populations. Sumter County's population of elderly persons increased significantly from 2000 to 2010, as also discussed in Chapter 2.

Table 11: Population Trends and Projections, FDOT District Five UZAs and Florida

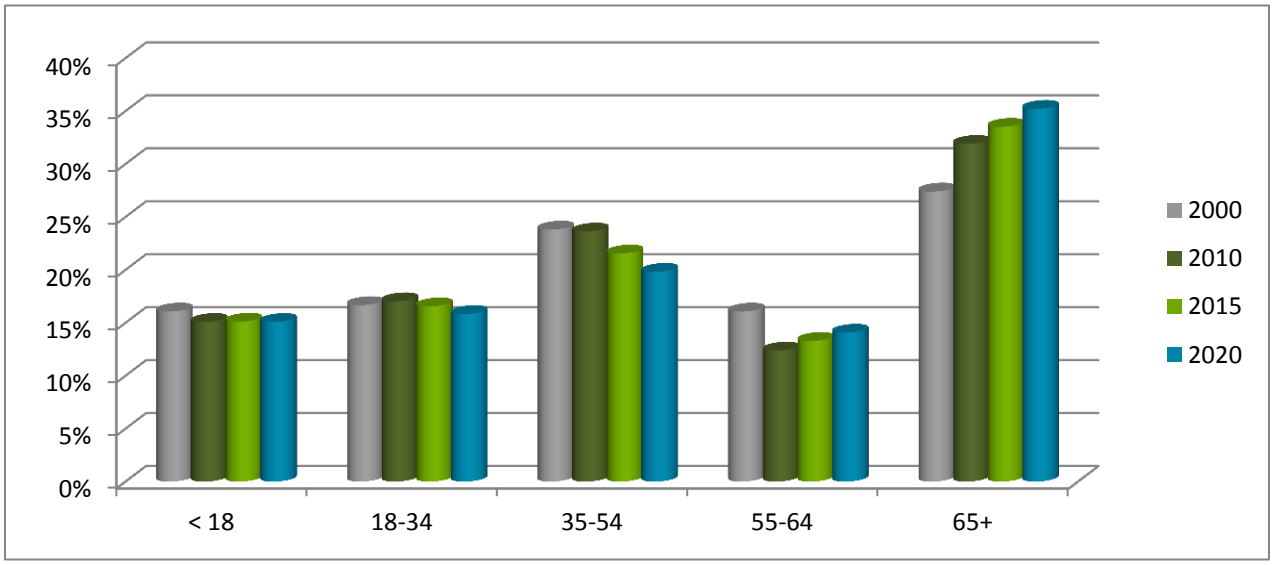
UZA	Population			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Deltona	147,713	182,169	183,705	23.3%	0.8%	24.4%
Kissimmee	186,667	314,071	342,986	68.3%	9.2%	83.7%
Lady Lake—The Villages	50,721	112,991	128,974	122.8%	14.2%	154.3%
Leesburg—Eustis—Tavares	97,497	131,337	138,945	34.7%	5.8%	42.5%
Ocala	106,542	156,909	165,413	47.3%	5.4%	55.3%
Orlando	1,157,431	1,510,516	1,595,224	30.5%	5.6%	37.8%
Palm Bay—Melbourne	393,289	452,791	464,421	15.1%	2.6%	18.1%
Palm Coast—Daytona Beach—Port Orange	255,353	349,064	357,008	36.7%	2.3%	39.8%
Titusville	52,922	54,386	56,506	2.8%	3.9%	6.8%
Florida	13,472,012	16,446,202	17,136,063	22.1%	4.2%	27.2%

Source: U.S. Census and BEBR



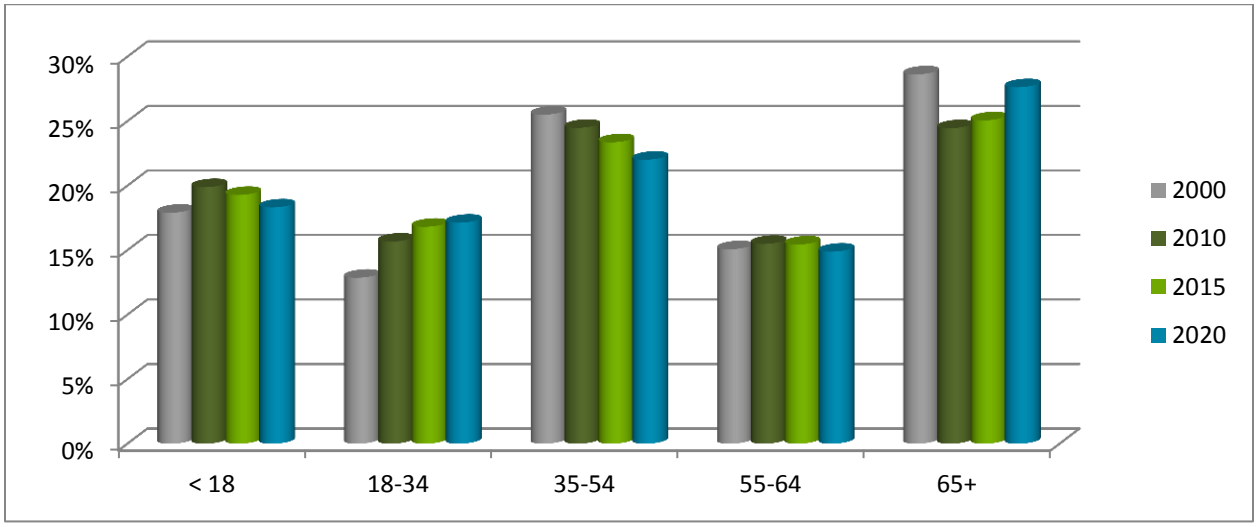
Source: U.S. Census and BEBR

Figure 58: FDOT District Five Relevant County Populations 2000 and 2010 Actual, 2015 and 2020 Projected



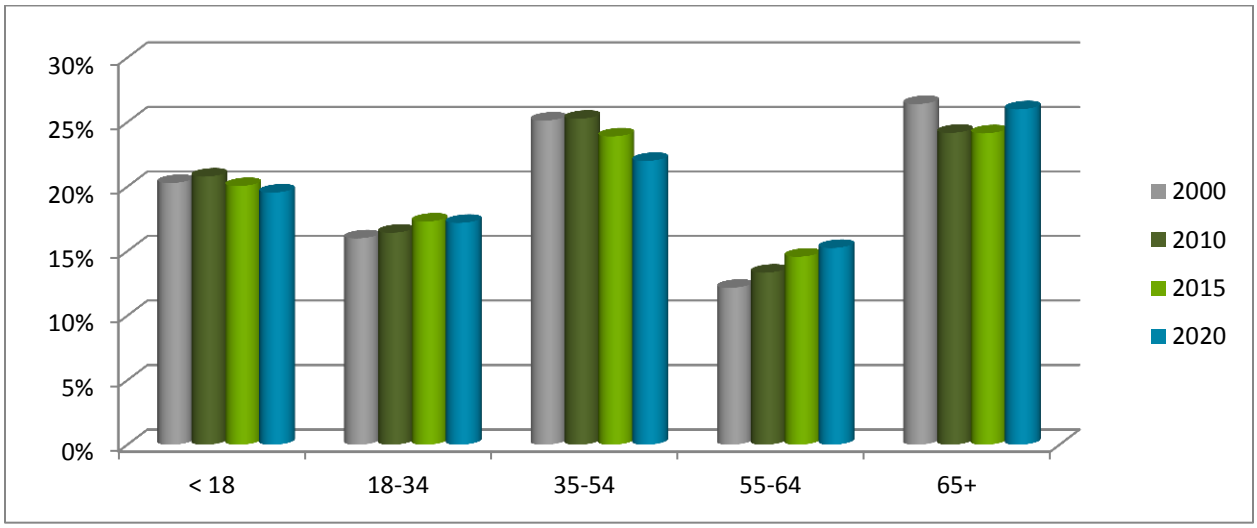
Source: U.S. Census and BEBR

Figure 59: Brevard County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



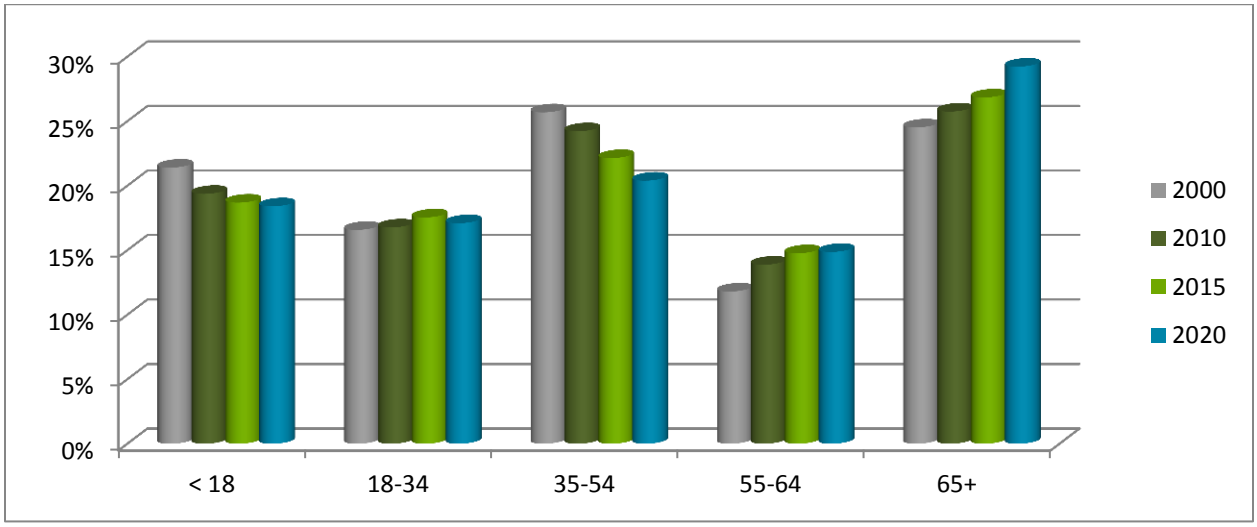
Source: U.S. Census and BEBR

Figure 60: Flagler County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



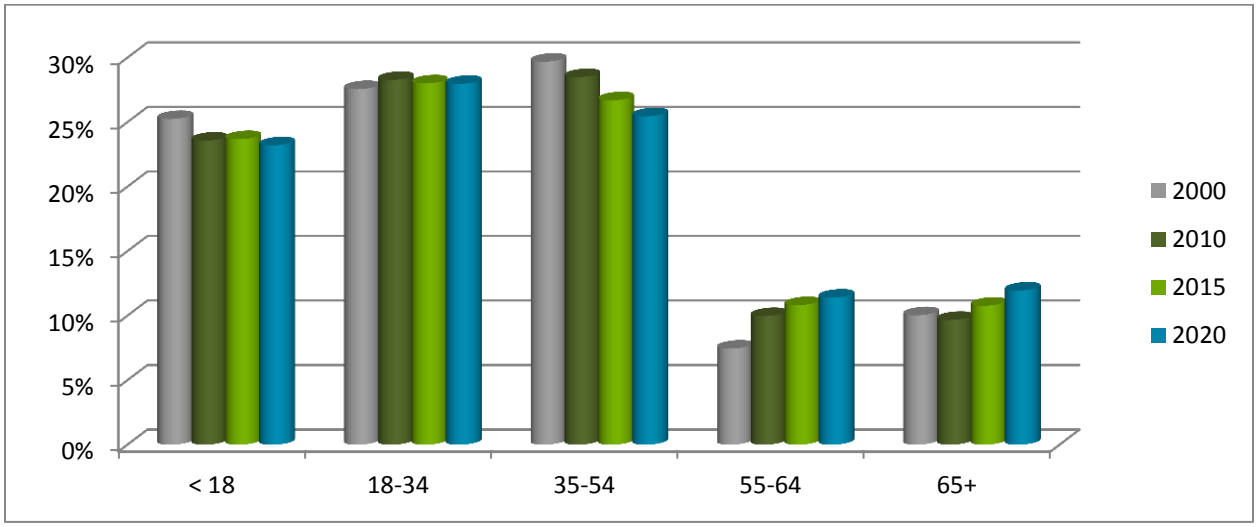
Source: U.S. Census and BEBR

Figure 61: Lake County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



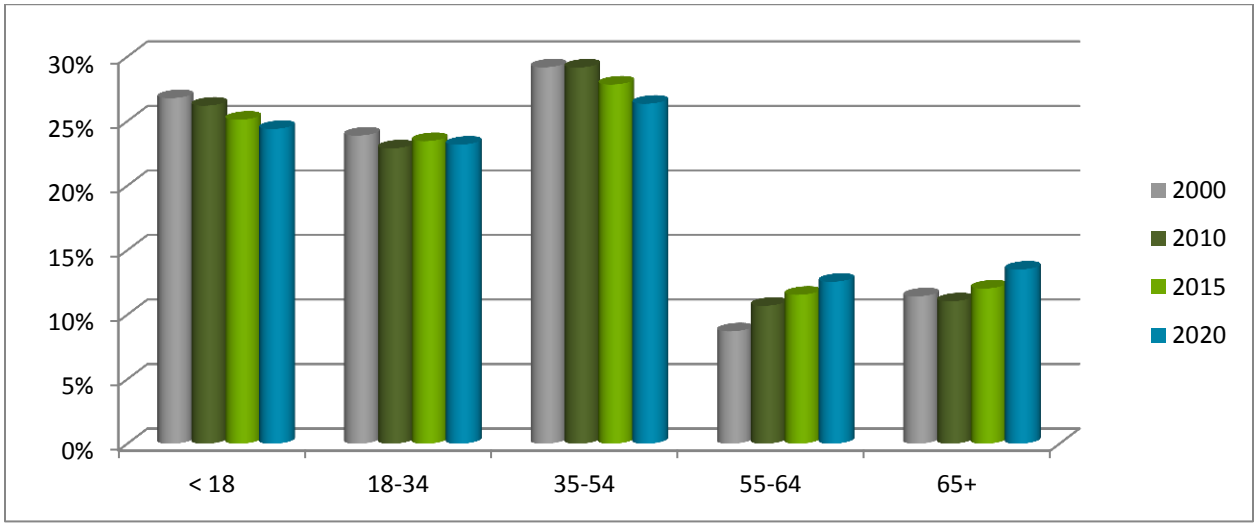
Source: U.S. Census and BEBR

Figure 62: Marion County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



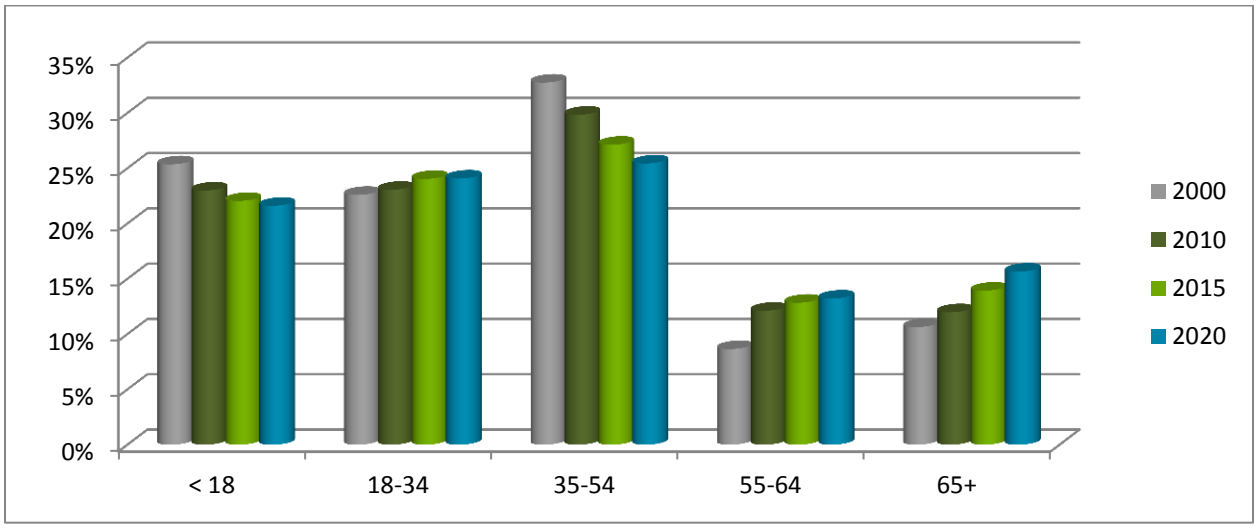
Source: U.S. Census and BEBR

Figure 63: Orange County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



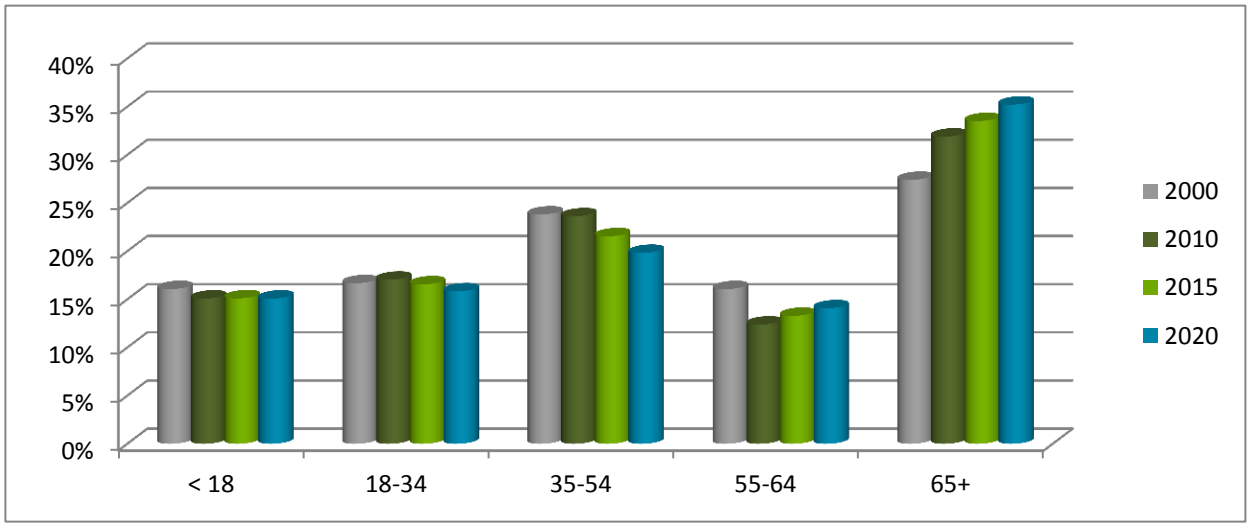
Source: U.S. Census and BEBR

Figure 64: Osceola County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



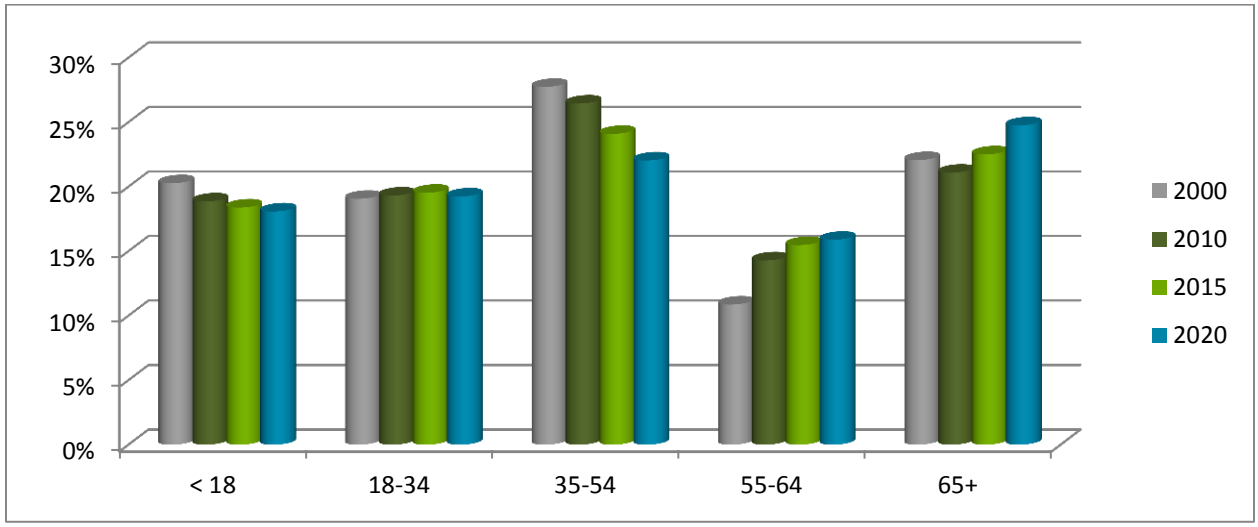
Source: U.S. Census and BEBR

Figure 65: Seminole County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 66: Sumter County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 67: Volusia County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected

Table 12 below provides the transit system information for those agencies operating in FDOT District Five and the UZAs described in this section. Lake County's LakeXpress began operating in 2007, and so there are no data for the system in 2000. SunTran continues to operate in the Ocala UZA, but in recent years it has applied for and been granted a small-systems reporting waiver from FTA. Between 2000 and 2010, ridership and service levels have increased dramatically for Space Coast Area Transit, which operates in Brevard County. During this time, VOTRAN has experienced ridership declines, despite increasing its level of revenue miles of service provided between 2000 and 2010.

In spring 2014, this area will get a new commuter rail transit service in the form of SunRail. The service will run 31 miles with 17 stations from Orlando north to DeBary. In peak hours, it is expected to carry as many passengers as one lane of Interstate 4. Ridership is projected to be 4,300 trips on opening day, increasing to 7,400 daily trips by 2030 (5). Another rail service expected to begin service within the next few years will be operated by the privately-owned All Aboard Florida. It will travel between Orlando and South Florida (44).

Table 12: Ridership and Service Supply for FDOT District Five Urban Transit Systems, 2000 and 2010

Agency	Passenger Trips			Revenue Miles		
	2000	2010	% Change	2000	2010	% Change
Lake County (LakeXpress)	n/a	232,794	n/a	n/a	384,653	n/a
Lynx (Central Florida Regional Transit Authority)	20,735,614	24,970,296	20.4%	10,967,378	15,776,292	43.9%
Space Coast Area Transit	302,322	1,733,519	473.4%	627,811	2,553,709	306.8%
SunTran (Ocala/Marion MPO)	154,719	n/a	n/a	317,548	n/a	n/a
Volusia County dba VOTRAN	4,046,072	3,329,232	-17.7%	2,531,865	3,014,826	19.1%
District Five Total	25,238,727	30,265,841	19.9%	14,444,602	21,729,480	50.4%
Florida Total	191,899,369	245,192,620	27.8%	98,913,886	135,812,378	37.3%

Source: National Transit Database

FDOT District Seven

Figures 68 through 71 illustrate the UZAs associated with counties and transit agencies contained within FDOT's District Seven. Additional graphics and narrative follow the maps in the figures.

FDOT District Seven contains the following UZAs:

- Homosassa Springs-Beverly Hills-Citrus Springs (Citrus and Marion Counties)
- Spring Hill (Hernando and Pasco Counties)
- Tampa-St. Petersburg (Hillsborough, Pinellas, and Pasco Counties)
- Zephyrhills (Pasco County)

In 2010, the Homosassa Springs-Beverly Hills-Citrus Springs UZA, shown in Figure 68 on the following page, was formed in Citrus County, with a very small portion in the southwest corner of Marion County. It has a land area of 90 square miles, and a 2010 population of 61,625. In 2017, its population is expected to increase slightly to 82,084. Regarding age demographics, this UZA is characterized by a large percentage of older people, and a lower percentage of younger people, with these trends projected to continue to 2017.

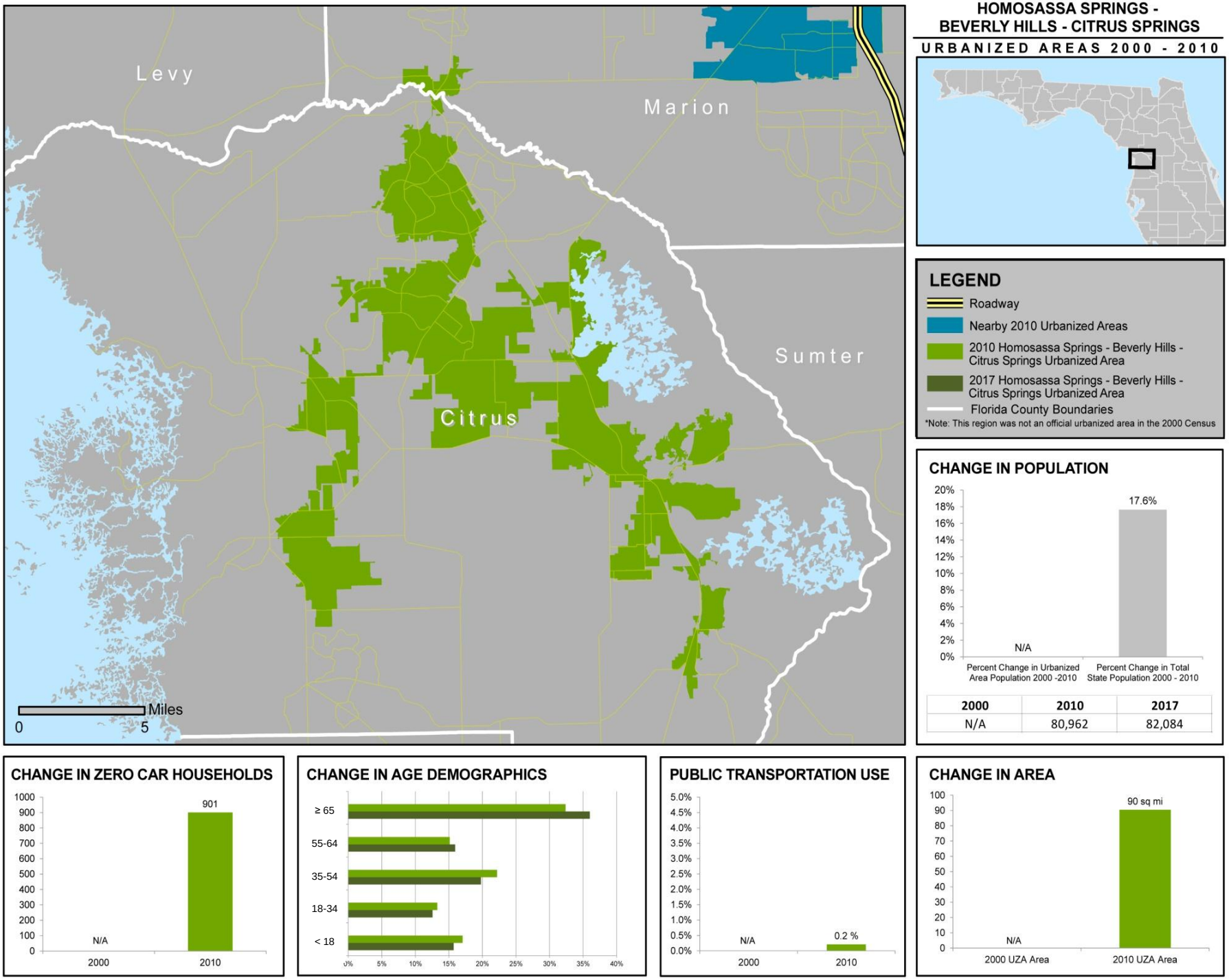


Figure 68: Homosassa Springs-Beverly Hills-Citrus Springs Urbanized Area, 2000 – 2010

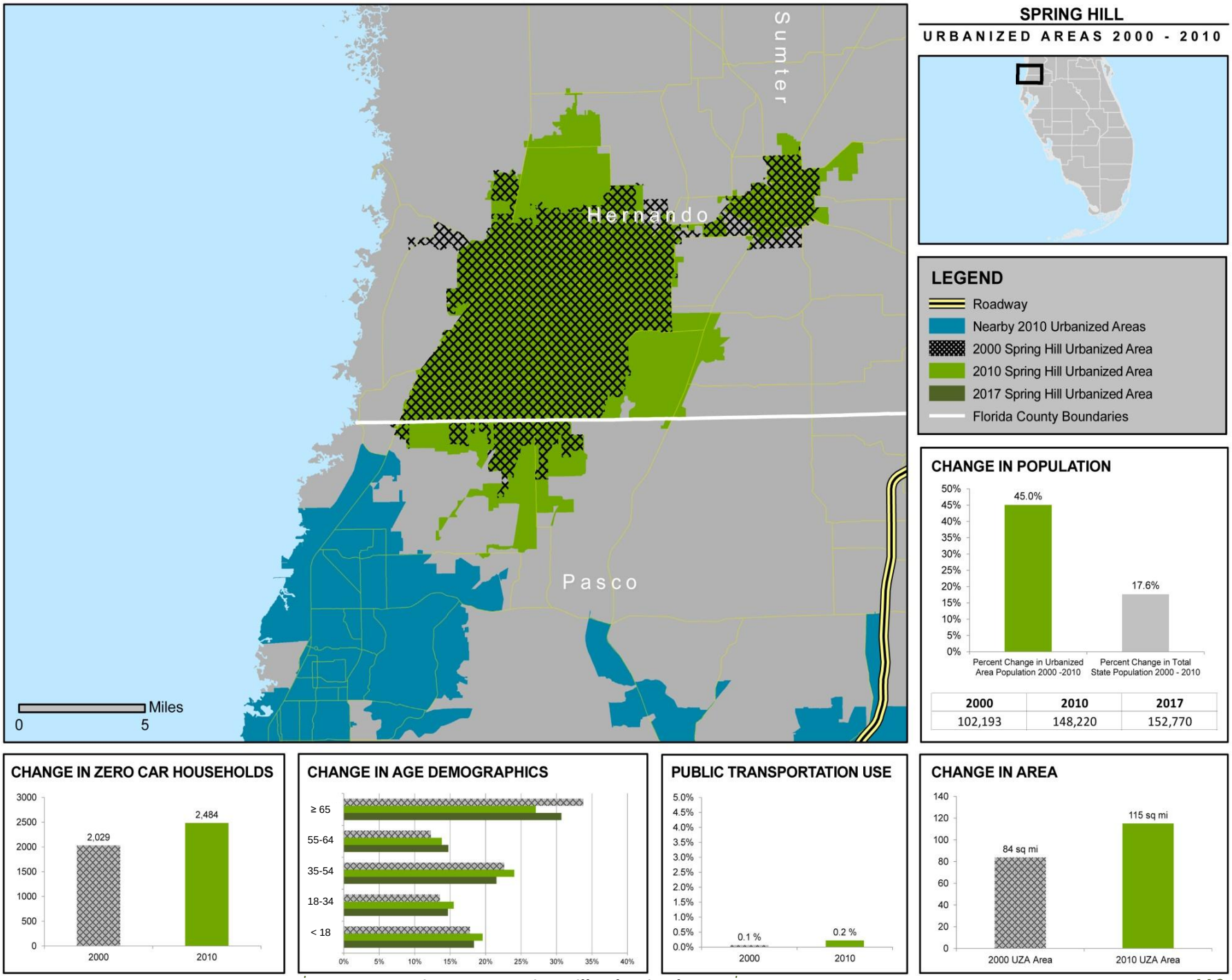


Figure 69: Spring Hill Urbanized Area, 2000 – 2010

As shown in Figure 69 on the previous page, the Spring Hill (formerly Brooksville) UZA is mostly contained in Hernando County, but does extend south into portions of Pasco County. Much of the Pasco County expansion occurred for 2010, although the UZA also expanded to the east and north. The population of this UZA grew 45 percent between 2000 and 2010, from 102,193 to 148,220. Population projections for 2017 indicate that this UZA will grow an additional 3 percent to 152,770. The number of zero-car households in the Spring Hill UZA increased from 2000 to 2010, and the use of public transportation for the work commute is very low.

Figure 69 also shows that, between 2000 and 2010, the Spring Hill UZA became younger overall. However, this trend appears to be reversing, as the 2017 age distribution projections show declining percentages of the younger age cohorts and increasing percentages of the older age cohorts.

Figure 70, on the next page, depicts the Tampa-St. Petersburg UZA and how it has changed from 2000 to 2010. Some projections for 2017 are also provided. This UZA is mostly located in Hillsborough and Pinellas Counties, but does extend north into Pasco County. The UZA population increased at a rate slightly higher than the state as a whole between 2000 and 2010, according to the figure. From 2010 to 2017, population is expected to increase 5 percent to 2,561,661. The number of zero-car households remained relatively flat from 2000 to 2010, while the use of public transportation for the work commute grew slightly over this time period.

Overall, the Tampa-St. Petersburg UZA became slightly younger from 2000 to 2010. However, as is the case with several other Florida UZAs, the trend appears to be reversing for the period after 2010, as seen in Figure 70. Projections for 2017 show slightly decreasing shares of the younger age cohorts and increasing shares of the older age cohorts. Interestingly, in 2010 the Tampa-St. Petersburg-Clearwater MSA was considered to be among the top ten areas in the U.S. with the highest percentage of those aged 65 and over, as discussed in Chapter 2.

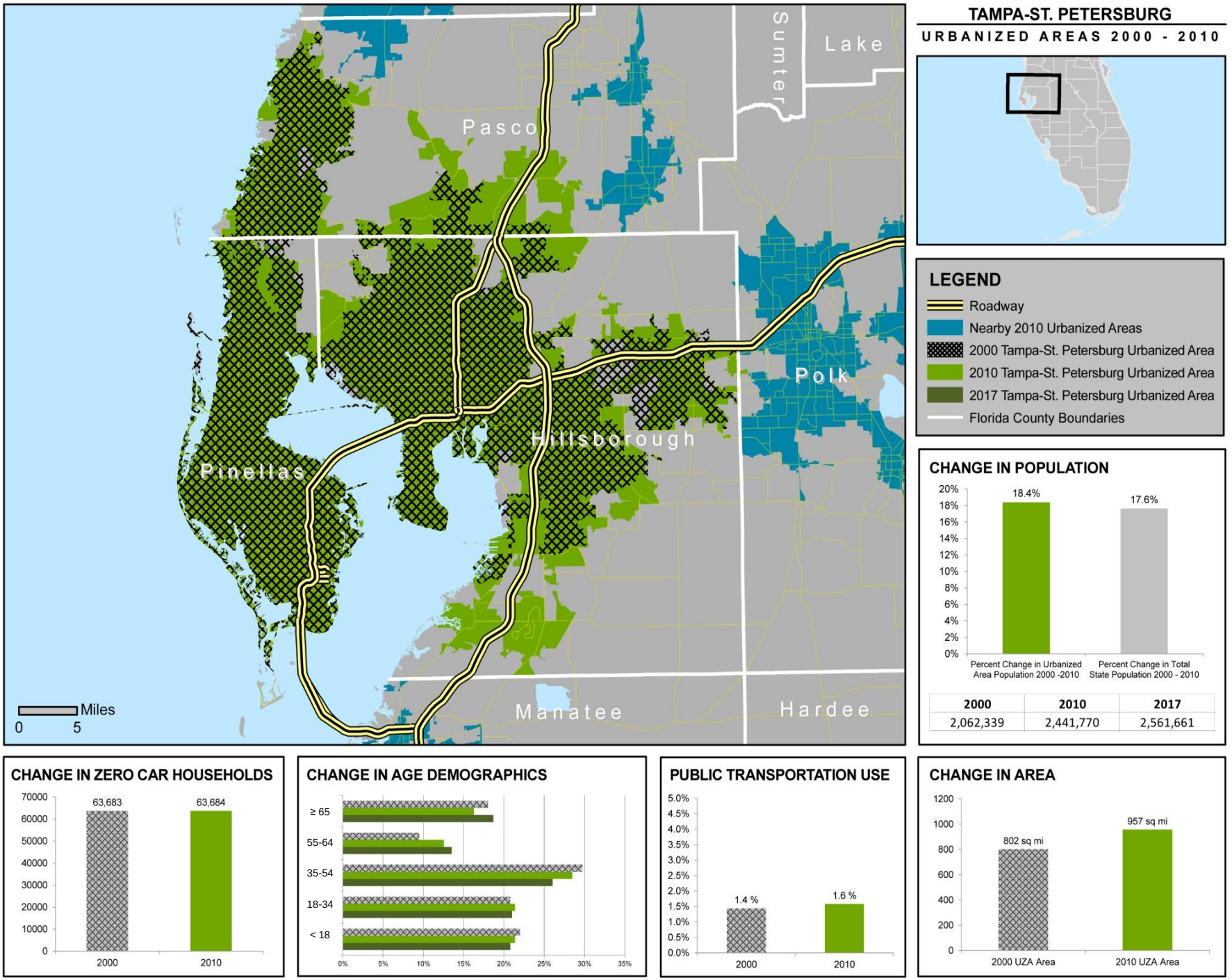


Figure 70: Tampa-St. Petersburg Urbanized Area, 2000 – 2010

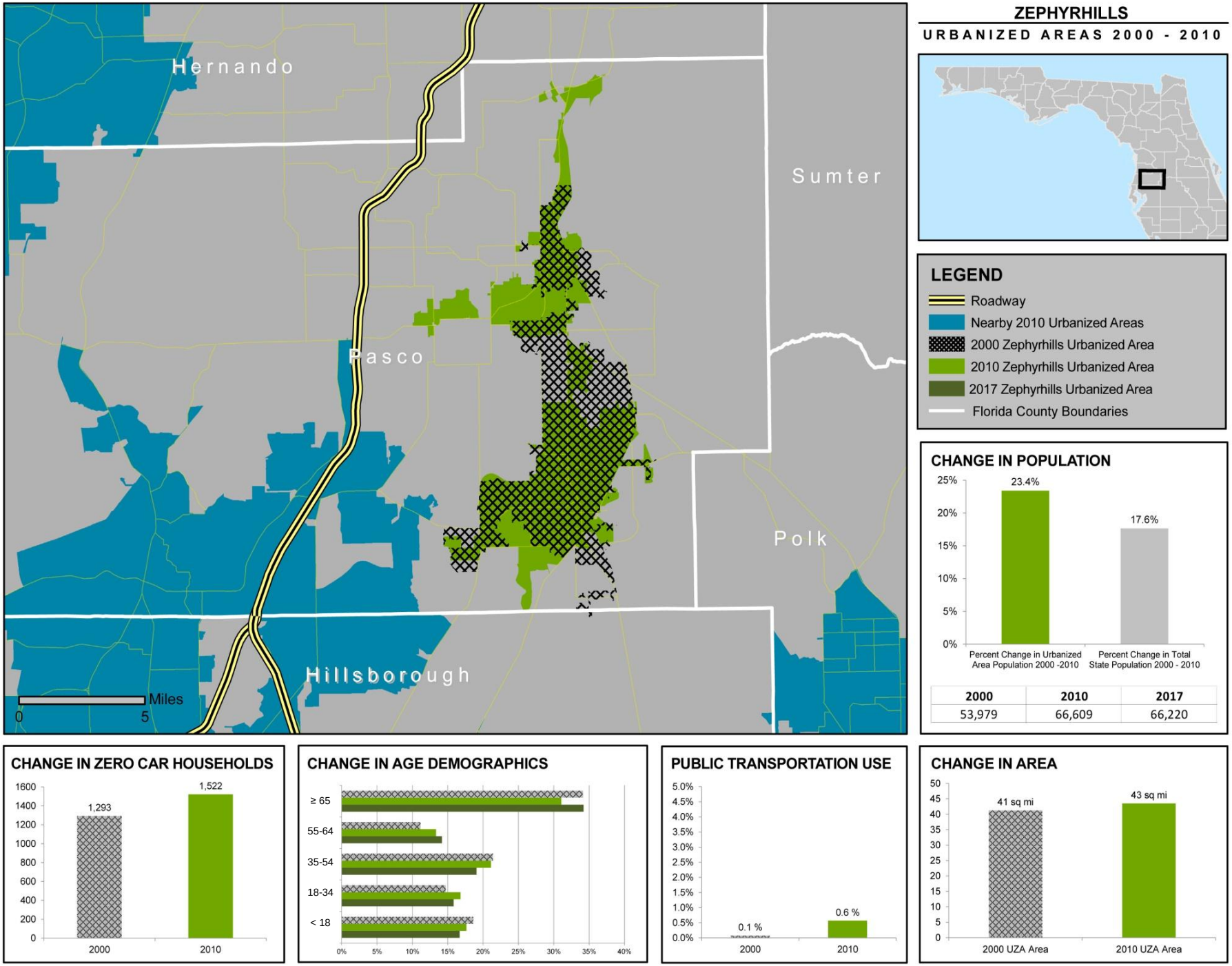


Figure 71: Zephyrhills Urbanized Area, 2000 – 2010

Figure 71 above shows the final UZA to be examined in this chapter. The Zephyrhills UZA is located in the eastern portion of Pasco County and grew, on net, by just two square miles between 2000 and 2010. The UZA population, however, increased more than 23 percent during this time. However, the population of this UZA is projected to decline less than one percent from 2010 to 2017. The number of zero-car households has grown from 2000 to 2010, as has the use of public transportation for the work commute.

The Zephyrhills UZA shown in Figure 71 has a very high relative percentage of those aged 65 and over. Further, this percentage is expected to increase from 2010 to 2017. Pasco County as a whole also has a high percentage of elderly persons; however, the percentage of those aged 18 to 34 is projected to hold relatively steady from 2015 to 2020, according to Figure 76 on page 119.

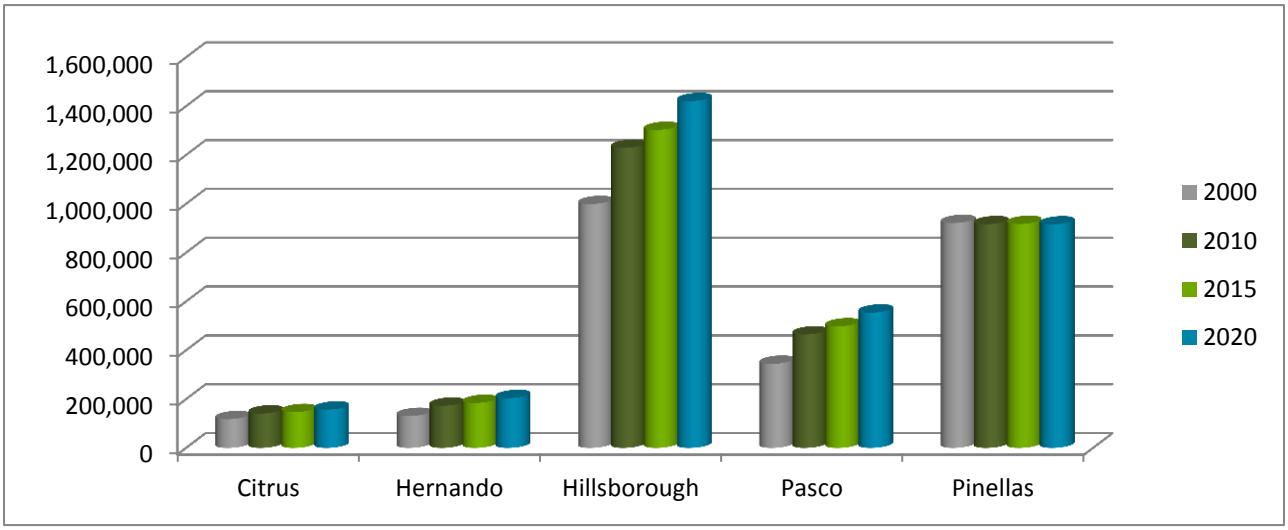
Population information for these UZAs is also presented in Table 13. The Spring Hill UZA grew the fastest from 2000 to 2010, increasing 45 percent. Overall, the Spring Hill UZA is projected to grow more than 49 percent from 2000 to 2017. Figure 72 shows population information for the five counties that contain these UZAs: Citrus, Hernando, Hillsborough, Pinellas, and Pasco.

Figures 73 through 77 on the following pages show actual and projected age distributions for the counties associated with these UZAs. Hillsborough County has the relative youngest population of the five, while Citrus has the relative oldest.

Table 13: Population Trends and Projections, FDOT District Seven UZAs and Florida

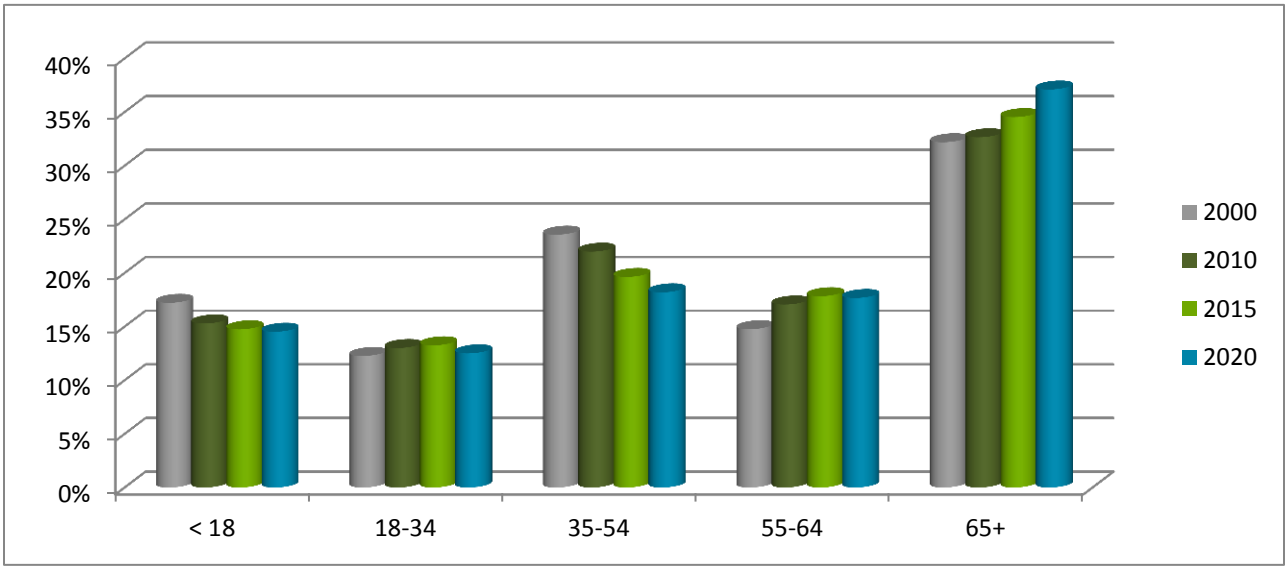
UZA	Population			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Homosassa Springs—Beverly Hills—Citrus Springs	n/a	80,962	82,084	n/a	1.4%	n/a
Spring Hill	102,193	148,220	152,770	45.0%	3.1%	49.5%
Tampa—St. Petersburg	2,062,339	2,441,770	2,561,661	18.4%	4.9%	24.2%
Zephyrhills	53,979	66,609	66,220	23.4%	-0.6%	22.7%
Florida	13,472,012	16,446,202	17,136,063	22.1%	4.2%	27.2%

Source: U.S. Census and ESRI



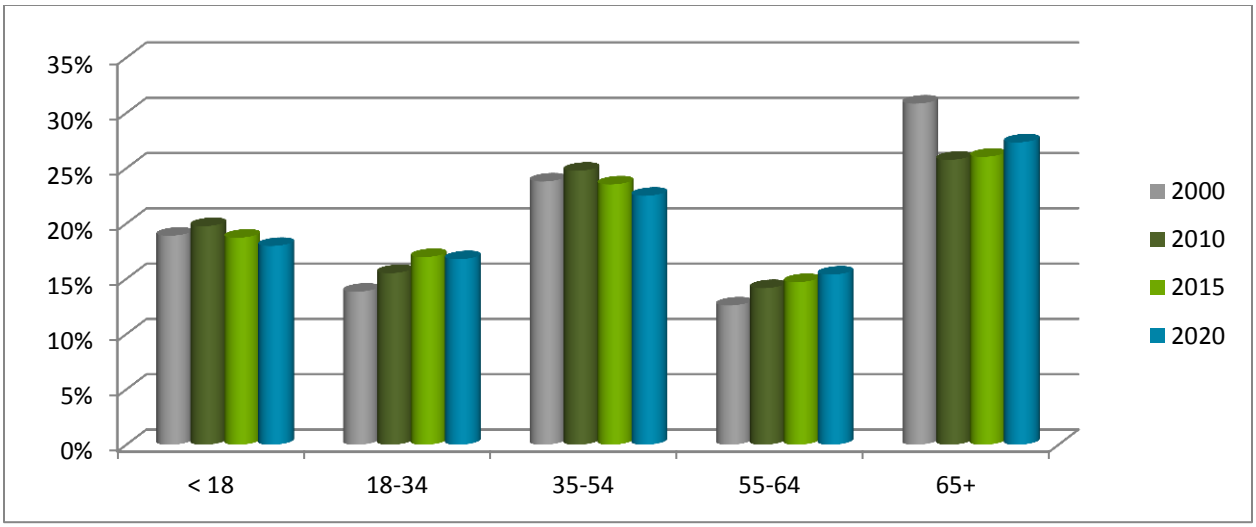
Source: U.S. Census and BEBR

Figure 72: FDOT District Seven Relevant County Populations 2000 and 2010 Actual, 2015 and 2020 Projected



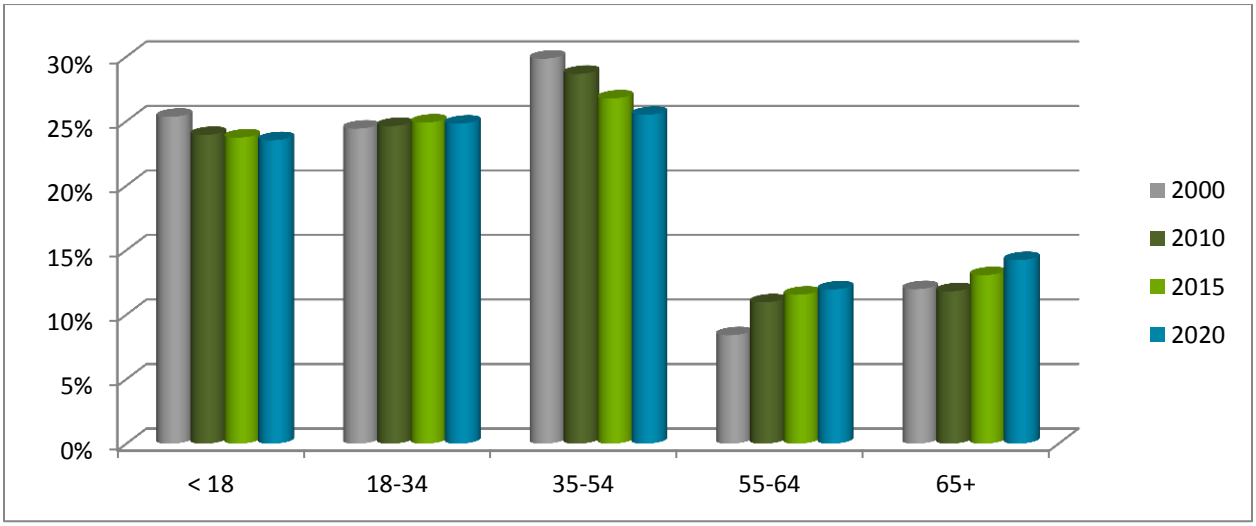
Source: U.S. Census and BEBR

Figure 73: Citrus County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



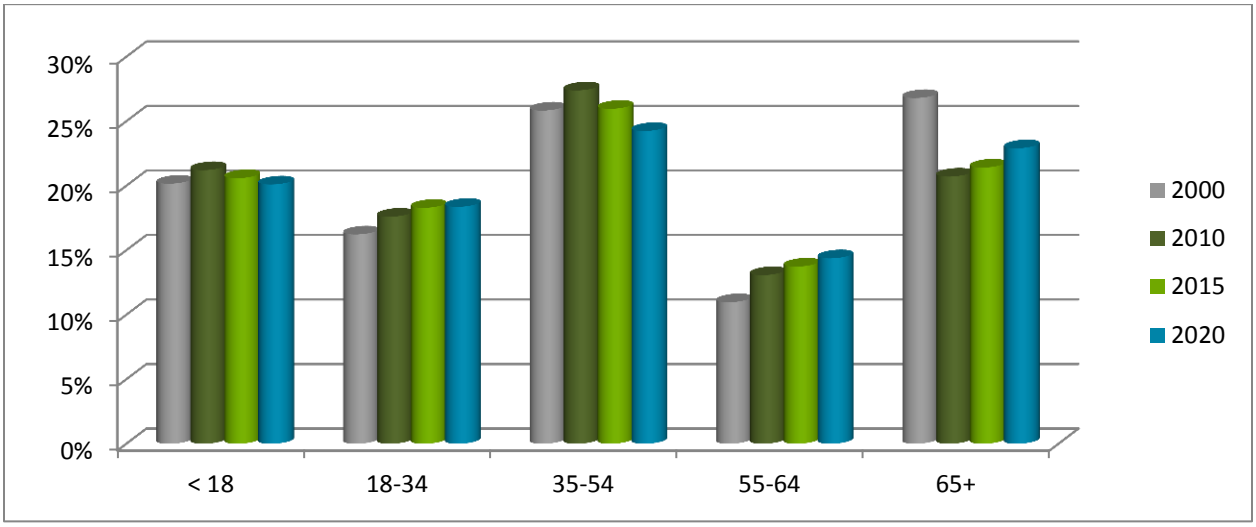
Source: U.S. Census and BEBR

Figure 74: Hernando County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



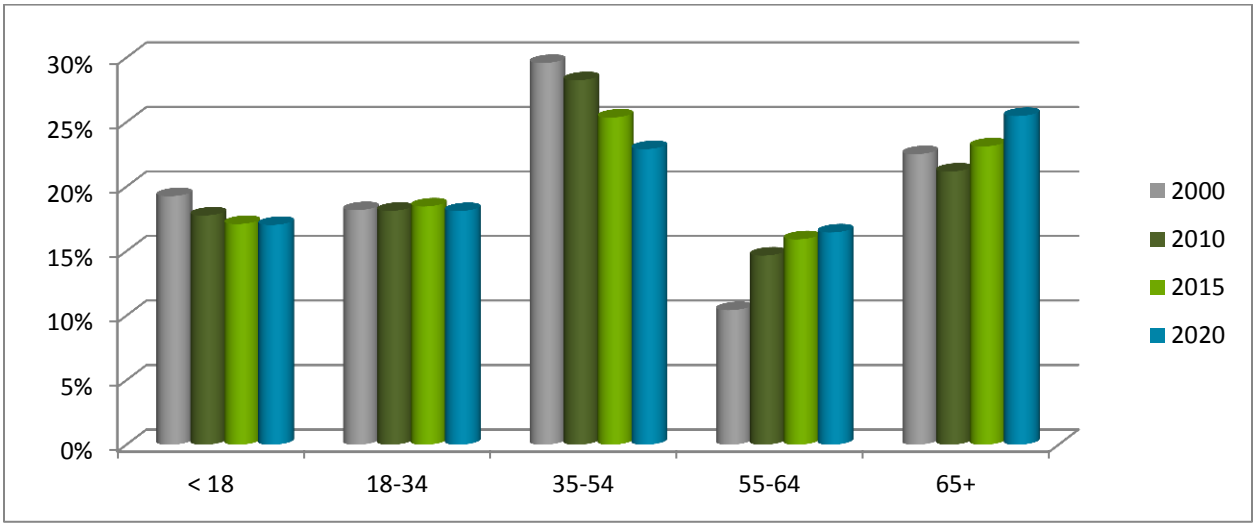
Source: U.S. Census and BEBR

Figure 75: Hillsborough County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 76: Pasco County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected



Source: U.S. Census and BEBR

Figure 77: Pinellas County Age Distributions – 2000 and 2010 Actual, 2015 and 2020 Projected

Table 14 below includes information about the four urban transit systems that operate in these UZAs contained in FDOT District Seven. TransHernando did not begin operating until after 2000, and so no data are available for that system to make comparisons with the 2010 data. Of particular note in the table is the significant increase in ridership for the Pasco County Public Transportation system, which saw ridership grow more than 470 percent, while revenue miles of service increased only 142 percent between 2000 and 2010.

Table 14: Ridership and Service Supply for FDOT District Seven Urban Transit Systems, 2000 and 2010

Agency	Passenger Trips			Revenue Miles		
	2000	2010	% Change	2000	2010	% Change
Hillsborough Area Regional Transit (HART)	9,219,738	13,233,764	43.5%	5,824,416	8,280,099	42.2%
Pasco County Public Transportation (PCPT)	136,142	779,606	472.6%	450,032	1,088,923	142.0%
Pinellas Suncoast Transit Authority (PSTA)	9,360,135	12,811,835	36.9%	6,776,511	9,000,501	32.8%
TransHernando (THE Bus, Hernando County)	n/a	69,945	n/a	n/a	147,415	n/a
District Seven Total	18,716,015	26,895,150	43.7%	13,050,959	18,516,938	41.9%
Florida Total	191,899,369	245,192,620	27.8%	98,913,886	135,812,378	37.3%

Source: National Transit Database

CHAPTER 5: FINDINGS – A VISION OF FUTURE TRANSIT RIDERSHIP IN FLORIDA

The purpose of this research effort was to examine some of the most significant changes in demographic trends for Florida between 2000 and 2010 to identify what trends may shape Florida over the next decade and beyond. A set of findings has been developed using the data and information from the first four chapters of this report that can aid the state's transit agencies in being prepared for these changes. This chapter presents these findings below.

Findings

Several findings emerge from the data, literature, and other information examined as part of this study. There are many key trends emerging at the national level and within Florida that can impact future ridership on the state's transit systems.

- Florida's urban population is increasing relative to the state's total population. Between 2000 and 2010, the population contained within the urbanized areas increased 22.1 percent, while the total population of Florida increased 17.6 percent. In 2010, 87 percent of the state's population was contained in the UZAs, compared to 84 percent in 2000. 2017 population projections indicate that more than 89 percent of the state's population will be contained in the UZAs. By 2020, Florida's population is expected to increase approximately 12 percent, while the U.S. population is projected to increase more than 8 percent. Information in this report found that nationwide trends are favorable toward urban growth. As people are attracted to more urban areas, rents and home prices in those areas will eventually increase, possibly making the suburbs and lesser urban areas more desirable again. It is likely that those cities that can market themselves well to younger people and provide high-skill job growth, cultural amenities, and access to high quality transit (bus rapid transit or appropriate rail modes) can maintain or continue to increase their growth over time, attracting not only younger people, but older people as well.

- Analysis in this report showed that many Florida cities have relatively low numbers of college graduates compared to other growing cities in the U.S. There are also relatively fewer high skill jobs in the state compared to other places in the country. Certainly, part of this is due to the large amount of low skill jobs related to the tourism industry. While tourism is critical to Florida's economy, it will also be critical to Florida's economic future for the state to attract higher skill jobs. Such jobs should attract more college-educated people to the state who will want to locate where these jobs are thus creating a potential market for transit ridership.

- In addition to the above, Florida educates large numbers of students in its many colleges and universities. It might be able to retain more of these young graduates, particularly those who studied in the STEM fields of science, technology, engineering, and

mathematics, if more of those jobs were available in the state. As the information presented earlier in this report shows, these young graduates are driving less and are much more interested in using transit than those in older age groups.

- Clearly, younger people, Millennials in particular, are driving less and are much more interested in using public transit and other alternative modes. There are many reasons for this, including lifestyle preference and environmental concerns, as well as economic concerns. Whether or not these trends persist as this generation ages, transit agencies can continue to tap this market of young people by appealing to these preferences. Transit systems that serve urban, mixed use areas that are also walkable can appeal to the Millennials' desire for such amenities. Transit systems can also tout "green" ideas of not needing a personal car, or their use of alternative fuel vehicles, if applicable. Younger people are increasingly willing to take transit, but younger "choice" riders will expect high levels and quality of service. Whether the transit systems in Florida can provide them with the types of services they would like to use remains an unanswered question.

- It is well known that younger people love technology. A survey reviewed for this report even found that Millennials would give up their car before they would give up their cell phones or computers. For every other age group in the survey, the car was deemed the most important and people in those age groups were more willing to part with their cell phones and other technology before their cars! Transit agencies, if they are not already, must continue to use technology and social media in ways to attract and retain young people as customers. The increasing availability of trip planners and real-time information on mobile devices definitely makes using transit easier and more convenient. Additionally, conveniences such as WiFi and bike racks make transit more attractive to the younger, more mobile generations.

- Two of the transit systems in the state, StarMetro in Tallahassee and the Gainesville Regional Transit System, both have ridership dominated by university students. They and other systems in the state that serve college students should market to them in a way that will encourage them to keep riding transit after they graduate. In addition, some of Florida's transit agencies might consider, if they have not already, following the lead of the Southeastern Pennsylvania Transportation Authority (SEPTA) and forming youth advisory councils to advocate and educate young people in the community about public transit. Such councils or groups can certainly be successful in smaller cities, too.

- If Florida's future transit ridership does not include as many younger people as some other places in the country, the state can likely still count on very high numbers of aging Baby Boomers. As one of the reports reviewed for this study stated, "the question is not whether Boomers are ready to take transit; the question is, are transit agencies ready for Boomers!" (1). There is no doubt that future transit ridership in Florida will continue

to consist of large percentages of older adults. Many Boomers may prefer to age in place, and might not be as attracted to the typical retirement communities popular with today's older seniors. It is likely that this coming generation of seniors may have some other characteristics that are different from their parents, particularly in the number of women who will have driver's licenses and who will be financially independent. Such characteristics may keep them driving longer. They will also be working longer, whether by necessity or choice, and they also want to remain active in their communities. Aging Boomers will also require significantly increasing numbers of medical trips. Should these trends persist and if many of the Boomers age in place, particularly in suburban areas, transit agencies will be challenged to provide them with the services they will require to continue working, participate in community events, and, most importantly, have access to medical facilities. To help meet the challenge, agencies should use marketing and outreach efforts to promote the use of fixed-route services as opposed to demand-response service.

- Traditional transit markets include youths, the elderly, low-income populations, those without access to a vehicle, and those who do not drive. These traditional transit markets have historically represented large proportions of transit ridership in Florida. While there is evidence that the state's transit agencies can continue to attract additional non-traditional, or "choice" riders, the demographic and socioeconomic trends examined in this report make it clear that these traditional markets will continue to require services and will continue to comprise a significant portion of the state's transit ridership.

- Data from the 2009 NHTS showed that new immigrants to Florida represent nearly 25 percent of the state's transit market, yet represent only 5 percent of the state's population. Further, additional data show that the total foreign-born individuals' share of the state's population was 13 percent in 1990. That share increased to 17 percent in 2000, and continued to rise to more than 19 percent in 2011 (2). Based on this information, it is anticipated that the number of immigrants to the state will likely continue to grow and, if so, that they will likely continue to represent a sizable share of Florida's transit ridership.

- For the first time in many years, Florida will be implementing a new commuter rail system. SunRail is scheduled to open in spring 2014, providing service to 17 stations along 31 miles between Orlando and DeBary. In studying potential ridership, SunRail plans to attract "choice" riders for the work commute, primarily from the I-4 high technology corridor. In addition, however, it is believed that the service will also attract younger people who do not have (or do not want) cars, those who believe the train will be convenient and save them money, and those who are concerned about the quality of the environment (3) (4). The service is also likely to attract some traditional transit riders including seniors who wish to travel to nearby medical facilities, as well as those

traveling to sporting events in Orlando and tourists. To be attractive to potential riders, SunRail will offer comfortable seats with tables for laptops or other materials, WiFi, power outlets, and bike racks, among other amenities (5). Several cities are also planning to provide "Flexbus" services to connect at the SunRail stations for a more streamlined experience for the riders (6). If SunRail is successful at attracting the riders it believes will want to use the service, it can represent a major shift in how transit is perceived, not just in the SunRail service area, but throughout the state, similar to the effect that the Tri-Rail commuter service (as well as Metrorail in Miami) has had in South Florida.

- With new services such as SunRail and All Aboard Florida, a rail service that is proposed to run between the Space Coast area and Miami, it will be easier for people to travel within the state via transit. Many areas in the state are investigating the benefits of more regionalized service to better serve the needs of travelers, both traditional transit riders and "choice" riders. More regional services, whether rail, bus rapid transit, or commuter bus, can appeal to all transit markets, including tourists.

- Much was written in this report regarding the Millennial generation and their collective desire to live in urban communities, drive less by choice, and take alternative modes such as transit more often. While it remains to be seen whether these trends will continue as the economic outlook improves and as this generation ages, these younger people represent potential choice riders and will expect to have convenient, frequent, attractive transit services with access facilitated by using mobile technologies. Such services will also attract choice riders from other demographic cohorts. Light rail transit, where it is feasible, would likely attract significant choice riders, and some areas in Florida are planning such systems for the future (such as Pinellas County). However, areas that do not wish to make an investment in rail can also attract a significant level of choice riders with the implementation of bus rapid transit (BRT), which has many of the characteristics of light rail systems but with lower costs and more flexibility. Transit agencies in North America that have implemented BRT have had great success in increasing overall ridership including the attraction of choice riders (7).

Increasing urbanization, younger people who are less interested in driving and more interested in walkable communities, and Baby Boomers aging in place represent some of the significant national trends that can strongly influence transit and ridership in the state. These national trends, along with other factors specific to the state, will help to shape the vision of future transit ridership in Florida.

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APPENDIX A: Annotated Bibliography

All Aboard Florida.*All Aboard Florida*. [Online] 2012. http://www.AllAboardFlorida.com

This website contains information about the planned intercity passenger rail service between Miami and the Space Coast. Florida East Coast Industries (FECI) will own, operate, and manage the service, which will operate along the Florida East Coast Corridor. Station locations have not been identified as of this writing.

American Public Transportation Association. (2012). *2012 Public Transportation Fact Book.* Washington, D.C.: American Public Transportation Association.

APTA's public transportation fact book identifies trends that point to evolution and growth in public transportation. Transit ridership is at its highest level in five decades, in terms of passenger trips, and over the past seven years public transportation ridership has increased significantly faster than both population growth and highway vehicle-miles traveled. Aiding in this has been the significant expansion by transit agencies into their application of real time data, both on their respective internet web sites, and through the creation of mobile apps. The 2002 Public Transportation Fact Book was also used to compile data from 2000.

American Public Transportation Association. (2007). *A Profile of Public Transportation Passenger Demographics and Travel Characteristics Reported in On-Board Surveys.* Washington, D.C.: American Public Transportation Association.

This APTA report is based on on-board surveys and is intended to provide a profile of public transportation passenger demographics and travel characteristics for the typical rider. Demographic data compiled included age, gender, ethnicity, household income, household size, occupation, vehicle availability, and vehicles owned. Questions regarding travel characteristics included the rider's access and egress mode (primary means of travel from a person's trip origin to a transit vehicle), alternative modes of travel if transit service were no longer available, duration of transit riding, frequency of transit travel, and transfer frequency. The report also makes a comparison to previous studies of a similar nature. Finally, the report compares the typical transit rider to the typical member of the general population, according to the 2000 U.S. Census.

American Public Transportation Association. (2011). *Impacts of the Recession on Public Transportation Agencies: 2011 Update.* Washington, D.C.: American Public Transportation Association.

This report is based on a March 2011 APTA survey and provides a national perspective of the degree of damage inflicted by the 2007-2009 recession on public transportation agencies and the Americans who use public transportation. In the face of the recession, many transit agencies have been allotted declining funding, forcing them to respond with service cuts, fare increases, and reductions in staff and benefits. The largest public transportation agencies have felt these impacts the most severely.

Badger, E. (2013, February 28). *Millennials Say They'd Give Up Their Cars Before Their Computers or Cell Phones*. Retrieved from The Atlantic Cities: http://www.theatlanticcities.com/commute/2013/02/millennials-say-theyd-give-their-cars-their-computers-or-cell-phones/4841/

This online article examines the results of Zipcar's annual survey, a national survey of 1,015 adults. Respondents were asked, "Losing which piece of technology would have the greatest negative impact on you?" The given options were TV, mobile phone, computer, and car. Among respondents, the most prized piece of technology was "cars" for every age group except the under-35s. For respondents ages 18-34, more people responded that losing their cell phone would have a greater negative impact on their daily routine than losing their car. This reinforces a growing shift in Generation Y away from personal automobiles, and towards alternative modes of transportation.

Breen, David. Four Cities Plan to Offer "Flexbus" Service at Sunrail Stations without Lynx. Orlando Sentinel. [Online] May 21, 2013. http://articles.orlandosentinel.com/2013-05-21/news/os-sunrail-station-bus-service-20130520_1_sunrail-stations-flexbus-maitland-station.

This article from the Orlando Sentinel discusses how the cities served by the upcoming SunRail service plan to provide connections to and from its stations. One obstacle to attracting "choice" car drivers from I-4 will be if they cannot easily connect to other services that take them to their final destination. The four cities in this article are working to provide "flexbus" services to help make those connections quickly and conveniently for potential passengers.

Chu, X. *An Assessment of Public Transportation Markets Using NHTS Data.* National Center for Transit Research at CUTR . Florida Department of Transportation. March 2012.

This report analyzes socio-demographics and travel characteristics for a sample size of 150,417 households in the U.S., including 15,884 households in Florida, with the objective of defining and assessing a range of transit markets in Florida and the U.S. The report finds that at 6.1 percent of the total U.S. population, zero-vehicle households represent the largest transit market, capturing more than 48.5 percent of the entire transit market in the US. The study also found that while zero-vehicle households and the most frequent users of transit rely on transit for more than 25 percent of their daily travel, transit still only plays a minor role for most other transit markets, including non-drivers and persons from extremely low-income households.

In Florida, while new immigrants (those who entered the U.S. during 2008-2009) make up less than 5 percent of Florida's population, they make up nearly 25 percent of the state's transit market. Comparing Florida to the U.S., in percentage terms, several transit markets are notably bigger in Florida. For example, households with income under $15,000 represent 41.9 percent of the entire transit market in Florida versus 28.9 percent in the U.S. Also, Florida is unique in that it has a much higher percentage of both new immigrant transit ridership and Hispanic ridership, as compared to the United States.

Davis, B., Dutzik, T., & Baxandall, P. (2012). *Transportation and the New Generation: Why Young People Are Driving Less and What It Means for Transportation Policy.* Frontier Group. Boston, MA: U.S. PIRG Education Fund.

Recently, the longstanding pattern of increasing vehicle miles driven per year has reversed, and young drivers are the demographic group leading this change in travel behavior. Studies show young people increasingly replacing driving with alternative modes of transportation, such as walking and biking. An increasing percentage of young people are not even getting a driver's license; the share of 14 to 34 year olds without a license increased from 21 percent to 26 percent from 2000 to 2010. Their motives vary, from concern for the environment to economic necessity due to a lagging economy. Others reasons given for the fall in driving among young people include the rise of new communications technology (cell phones, social media, etc.) which can allow many young people to forego the need for many trips altogether, and technology improvements that have made alternative transportation modes more attractive; an example of this would be smart phone applications that allow the tracking of buses in real time. This pattern of declining driving rates among youths is not unique to the United States, but has also been seen recently in other developed countries.

Another contributing factor to the rise of transportation alternatives is the migration of Americans, and particularly young people, to urban areas that traditionally have many transportation alternatives. Recent years have seen revitalization efforts in centrally located urban areas, which are being repopulated by both Baby Boomers and young adults. The boomers are attracted by the smaller living spaces (as their children have left the nest) and easily accessible social amenities, while the young adults enjoy the many economic, social, and recreational activities associated with these revitalized urban areas, as well as easy access to transportation alternatives and a shorter commute to work.

Dawson, P. (2010, July 19). *Youth Advisory Council Provides Input to SEPTA.* Retrieved from Passenger Transport: the source for public transportation news and analysis : http://passengertransport.apta.com/aptapt/textonly/printall.php?id=aptapt20100719

This article details the efforts of the recently created Youth Advisory Council to its parent organization, the Southeastern Pennsylvania Transportation Authority (SEPTA). The SEPTA Youth Advisory Council gives young riders unprecedented input into public transportation issues, and the program's success has led other agencies to look to it as a model for similar endeavors. Since its creation in 2009, the youth council's 17 members have spearheaded a widespread advocacy campaign that focuses on outreach, communications, and service evaluation.

The youth council hosts numerous events where it engages the community youth in discussions on the role and importance of transit services for the community. The council has also teamed up with local university administrations with a presence at student orientations, ensuring that youth entering the community will be knowledgeable about transit options in the Philadelphia region. The Youth Advisory Council has been invaluable in providing SEPTA with firsthand insight into the needs of the growing customer base their demographic represents.

Denslow, D. A. (n.d.). *Florida's Job Structure.* Retrieved from Bureau of Economic & Business Research: https://www.bebr.ufl.edu/articles/economic-analysis/florida-s-job-structure

This report on Florida's job structure notes that the state has a disproportionate share of relatively low skill jobs, partially as a result of an economy that heavily revolves around catering to tourism and retirees. The only high skill occupations where Florida has a larger than national employment share are legal and healthcare-related services and office/administrative support. Florida also employs many construction, installation, maintenance and repair-related occupations, which pay slightly better than average. Overall, the real relative wage of Florida's average job was 2.9 percent below the national average in 2008.

Denslow, D. A. (n.d.). *The Structure of Florida's Economy and Educational Attainment.* Retrieved from The Bureau of Economic & Business Research : https://www.bebr.ufl.edu/articles/economic-analysis/structure-florida-s-economy-and-educational-attainment

This report examines the impact of educational attainment on Florida's economy. Florida's economy is based in large part around providing services for retirees and tourists, services which generate jobs that generally do not pay very well and require little education. As a result, a relatively small percentage of Florida's young people, particularly young men, have college degrees. Only 21.6 percent of Florida men between the ages of 25 and 34 have college degrees, well below the national average.

The report notes that it is becoming increasingly obvious that variation in the share of workers with talent and high educational attainment is the major source of variation in economic growth across cities, and as such Florida is in danger of falling behind. The financial benefits of employing many workers with college degrees also spill over to their coworkers, who benefit by working with well trained, intelligent individuals whom they can learn from.

Denslow, D. A. (n.d.). *Trends in Florida's Job Structure 2001 to 2008.* Retrieved from The Bureau of Economic & Business Research : https://www.bebr.ufl.edu/articles/trends-florida-s-job-structure-2001-2008

This report details trends in Florida's job structure from 2001 to 2008. Florida's economy relies heavily on service industries catering to tourists and retirees, and most of these jobs are low skill and low paying, leaving Florida with a shortfall of young adults seeking higher education. According to the Bureau of Labor Statistics, the real relative wage of Florida's average job was 2.9 percent below the national average in 2008. From 2001 to 2008, Florida has gained low skill jobs and lost high skilled jobs relative to the U.S.

Dewey, J. (n.d.). *Florida's Long Term Economic Trajectory Emerging from the Great Recession.* Retrieved from The Bureau of Economic & Business Research: https://www.bebr.ufl.edu/articles/economic-analysis/florida-s-long-term-economic-trajectory-emerging-great-recession

This report examines Florida's long term economic trajectory in the aftermath of the Great Recession. Florida's per capita income was falling relative to that of the nation throughout the 1990s, but was boosted by the housing bubble in the early 2000s, which Florida profited from considerably, although this was matched by high losses in the state when the bubble burst. Although states that were hit similarly hard by the housing bubble, such as California, have had a quicker recovery, which may be due to the higher proportion of high skill jobs (and workers with high educational attainment) prevalent in California and other states, which Florida lacks. The composite of jobs in Florida between 2000 and 2011 shifted

even further towards low paying jobs, such that the number of jobs grew faster than GDP in Florida over 2011, implying a drop in productivity in absolute terms.

FDOT Office of Policy Planning, Center for Urban Transportation Research at the University of South Florida. (2012). *Trends and Condisitons Report- 2012.*

This report discusses trends and the overall condition of Florida's tourism industry, and the implications of tourism on statewide travel and traffic. Tourism is particularly critical to Florida's economy, and thus it is imperative that Florida plans accordingly to accommodate tourists' travel needs. The report estimates that visitors account for 7.5 to 8.2 percent of all vehicle travel throughout the state, and visits to Florida by nonresidents are increasing. Tourism levels should influence policies on how to fund transportation infrastructure and service investments in the most equitable and efficient manner. The report also details positive and negative impacts of the tourism industry for the local development of the local economy.

Florida Department of Transportation. *SunRail*. [Online] 2013. http://www.sunrail.com

This website contains information about the SunRail commuter rail service expected to begin operating in 2014. The Florida Department of Transportation, along with the City of Orlando and the Counties of Orange, Seminole, Volusia, and Osceola, are working together to implement this service. The first phase of the project will serve 12 stations along 31 miles.

Florida, R. (2012, April 10). *Why Young Americans Are Driving So Much Less Than Their Parents*. Retrieved from The Atlantic Cities: http://www.theatlanticcities.com/commute/2012/04/why-young-americans-are-driving-so-much-less-their-parents/1712/

Young people in the US are less interested than ever in driving and automobile ownership, according to a study conducted by the Frontier Group and the US PIRG Education Fund. Not only has the average annual number of vehicle miles traveled by young people (16 to 34-year-olds) decreased 23 percent from 2001 to 2009, but the share of young people without a driver's license has increased as well, from 21 percent in 2000 to 26 percent in 2010.

This increasingly widespread trend of foregoing cars in favor of alternative modes of transportation is being embraced by young people. In 2009 as compared to 2001, young people walked more, took more bike trips, and traveled far more miles via public transit than before. Partially, this shift is due to the financial burden of an economy recovering from a recession, but even among 16 to 34-year-olds with incomes exceeding $70,000 biking, walking, and public transit use are all still very much so on the rise. In addition to economic factors, concern for the environment, the advent of social media and connectivity that makes at least some trips unnecessary or avoidable, and shifting cultural perceptions about the necessity of owning an automobile, are all contributing to the decline of automobile ownership in the United States.

Frey, W. H. (2011). *The Uneven Aging and 'Younging' of America: State and Metropolitan Trends in the 2010 Census.* Metropolitan Policy Program at Brookings Institute. Washington, D.C.: Brookings Institute.

The oldest of the Baby Boomers, a generation that includes some 80 million Americans, have just begun crossing over into senior citizen (65+) territory while, simultaneously, the child and young adult populations of much of the country are growing at a much slower rate, or even have declining youth populations. This brief examines 2010 census data to evaluate these uneven aging and "younging"

patterns. It examines national patterns of age-related growth and decline; the geography of senior and soon-to-be senior populations; and city-suburban shifts in aging.

The report finds that between 2000 and 2010, the population age 45 and over grew 18 times as fast as the population under age 45. Additionally, the migration of young adults has geographically impacted the skew of America's aging, as the most rapid aging tends to occur in areas where the younger population is declining. On a regional basis, since 1990 both the Northeast and Midwest increased their median ages more than the South and West, sharpening the divide between the Snow Belt and the Sun Belt. Florida remains a "retirement magnet" area, and has the highest concentration of senior citizens of any state, although 17 of the 25 states with the highest senior concentrations are in the "Snowbelt." A divide has begun to emerge, and continues to grow, between those areas which are gaining young people, and those where the youth population is shrinking. This unevenness in effect makes some regions much more vulnerable to the effects of an aging population than others.

Frey, W. H. (2011, October 28). *Young Adults Choose "Cool Cities" During Recession* . Retrieved from Brookings Institute : http://www.brookings.edu/blogs/up-front/posts/2011/10/28-young-adults-frey

Analysis of post Great Recession migration patterns in the United States shows that young adults are increasingly migrating to metro areas which have a certain amenable vibe- college towns, high tech centers, and "cool cities." Cities heading this list of top destinations for young adults include Denver, Houston, Dallas, Seattle, Austin, Washington D.C., and Portland, all destinations where young adults can feel connected and have attachments to colleges or universities among highly educated residents. Whereas previously the top destinations for migrating young adults had been cities with strong job markets and affordable housing (i.e., good places to start a career and a family), the mortgage meltdown and spiking unemployment in recent years have changed that; now, a select group of metro areas with modestly growing economies and a growing population of young adults are the "cool" places to be.

Guzzetti, A. (2012, December 14). *2012: The Policy Year in Review.* Retrieved from Passenger Transport: the source for public transportation news and analysis: http://newsmanager.commpartners.com/aptapt/issues/2012-12-14/21.html

This article reviews the American Public Transportation Association's (APTA) public transportation efforts by the agency throughout the year. APTA has become involved in energy discussions at a greater level than ever before, highlighting public transportation's place as a central element of energy policy. APTA urges investment in a balanced transportation system that allows energy-efficient transportation options. In light of the need for greater funding to fuel the growing demand for public transportation, an action plan has been created which provides models for new funding and financial models. The article notes that public transportation is increasingly popular among voters, who approved 49 of 62 public transportation measures at the ballot box in 2012. Additionally, APTA is making efforts to target access to health services through public transportation as a priority; The American Public Health Association estimates that 3.5 million health appointments per year are missed because of transportation issues.

Hubbard, R. Glenn and Patrick, O'Brien Anthony. *Macroeconomics, 4th Edition*. Upper Saddle River, New Jersey: Pearson, 2013.

This is a current book on macroeconomics and policy that also addresses causes and consequences of the severe recession that occurred from 2007 to 2009. This recession was the worst since the Great Depression and is often referred to as the Great Contraction, or the Great Recession

Immigration Policy Center. *New Americans in Florida*. [Online] January 11, 2013. http://www.immigrationpolicy.org/just-facts/new-americans-florida.

This fact sheet, available on the Immigration Policy Center website, provides population and demographic data related to the number of immigrants in Florida and their characteristics.

Lade, D. C. (2011, November 30). *Census shows fewer seniors in some South Florida cities*. Retrieved from Sun-Sentinel: http://articles.sun-sentinel.com/2011-11-30/news/fl-census-senior-growth-stalled-20111130_1_fewer-seniors-scott-cody-dick-ogburn

This article describes a shift in the aging of the population of South Florida, as the 2010 Census reveals declining senior citizen populations for many parts of the area. Broward County lost 4 percent of its 65+ population between 2000 and 2010, with a total of fourteen Broward cities losing a combined 11,685 seniors over the decade. One belief is that as many South Florida communities have become more congested and more urban, it has become a less attractive destination for some seniors.

The state of Florida remains the top destination for seniors, retaining the highest percentage of senior residents in the country, with 17.3 percent of the population older than age 65, as of 2010. Yet these retirement communities are trending further north than before; Sumter County, an hour northwest of Orlando, has nearly tripled its senior population over the past ten years, thanks in part due to The Villages, a 26,000 acre development of retirement "towns."

Lowy, J. (2012, November 11). Boomers may reshape transporation. *The Tampa Tribune* , 17.

The Baby Boomer Generation, which includes 74 million Americans born between 1946 and 1964, transformed travel in the US, with the rise of the two-car family and dual-earner family, drastically increasing travel by nearly every metric, for the past 40 years. Recently, however, as the boomers now begin to retire, this pattern of increasing travel has shifted. In 2006, the rate of growth in US travel began slowing down, followed by a sharp decline in the actual number of vehicles miles traveled in 2008, which has since leveled off.

8,000 baby boomers turn 65 every day in the U.S., and questions remain as to how traffic will be impacted. While retirement generally involves far less travel, they baby boomers are more mobile than any generation before them, and have shown less taste than previous generations for isolated living in age-restricted retirement communities, according to a report by the Urban Land Institute.

Lowy, J. (2012, April 16). *Public Transit Systems Facing Repair Backlogs As Ridership Rises.* Retrieved from Huffington Post: http://www.huffingtonpost.com/2012/04/16/public-transit-systems-repair-backlogs_n_1429329.html

This article details the decaying state of many older transit systems in cities throughout the U.S. The infrastructure may be in need of repair, but due to high gas prices and a sluggish economy, people have been using transit services in greater numbers than ever; according to the Federal Transit Administration, the number of trips taken over the current 12-month period is expected to break the previous record of 10.3 billion trips in one year, set in 2008. To handle this increase in ridership, transit systems nationwide are in desperate need of repair and expansion.

The article points to San Francisco's subway system, Bay Area Rapid Transit, at one time the most automated subway system in the nation, which today struggles to replace circuit boards and other electronic components that are not even manufactured anymore, a problem faced by older transit systems nationwide. $9 billion in stimulus funds for transit projects courtesy of the Obama administration will help spur infrastructure improvements, critical money at a time when federal and state tax revenues are down, in the face of a weak economy and persistently high unemployment.

Lowy, J. (2012, April 6). *Young Americans less likely to drive*. (Associated Press) Retrieved from http://news.yahoo.com/young-americans-less-likely-drive-203002275.html

In recent decades, the share of young people (16 to 39-year-olds) with driver's licenses has markedly declined, with the greatest decreases among the youngest drivers, those in their late teens and early twenties. This is a fundamental change in the United States, as getting a driver's license has been a rite of passage of sorts for young Americans since the end of World War II.

A weak economy has made it particularly hard for young workers, who have responded by migrating in large numbers towards large cities, which have a multitude of alternative transportation options, less costly commutes, and little need for buying and maintaining a costly automobile. In addition, the rising popularity of social networking may be causing young people to drive less as well. A recent study of 14 countries found that the countries where young people are driving less are generally wealthier, a higher share of the population is older, lives in large cities, and uses the internet.

Lynott, J. a. (April, 2011). *How the Travel Patterns of Older Adults Are Changing: Highlights from the 2009 National Household Travel Study.* Washington, D.C.: AARP Public Policy Institute.

This report summarizes the findings of the 2009 National Household Travel Survey (NHTS). US drivers are getting older; between 2001 and 2009, the percentage of trips taken by persons age 65 and older increased in terms of the share of total trips, the share of total miles traveled, and the share of drivers. Simultaneously, from 2001-2009 travel by Americans of all ages decreased in part due to high gas prices and a weak economy.

Travel preferences have changed as well; while the total number of trips is declining, the proportion of trips by mode has changed, with more people beginning to favor public transportation. Critically, among the converts to public transportation are people age 65+, who have begun to adopt public transportation in large numbers- between 2001 and 2009, transit use by people age 65+ (as a share of all the trips they

take) increased by 40 percent, reversing the trend of the past few decades of declining public transit use by that age group.

Mackun, P. a. (March 2011). *Population Distribution and Change: 2000 to 2010.* U.S. Census Bureau.

This report examines population change from 2000-2010 at several different geographical levels, including regions, states, metropolitan and micropolitan statistical areas, counties, and places. The 2010 Census reported a 9.7 percent increase in the US population from the 2000 Census, the lowest reported ten year population increase since 1900, other than the 1930s. Regional growth was highly concentrated in the South and West, following the pattern of the past several decades.

Florida had the third largest numeric population increase among states, with an increase of 2.8 million people. Palm Coast, Florida, was the fastest growing Metropolitan Statistical Area between 2000 and 2010, with a 92 percent population increase, while the Miami-Fort Lauderdale- Pompano Beach MSA was the eighth most populous in the U.S. Many counties in Florida experienced high population growth at or above 10 percent. At the county level, Miami-Dade, Florida, was the eighth most populous county in the U.S, while Flagler, Florida, was the third fastest growing county in the US, with a 92 percent population increase from the 2000 Census.

McGuckin, N. a. (2012). *Impact of Baby Boomers on US Travel, 1969-2009.* Washington, D.C.: AARP Public Policy Institute.

The Baby Boom Generation (born 1946-1964) has been responsible for much of the growth in travel over the past 40 years, in terms of both the number of travelers and the amount of travel per person. The baby boomers started driving young, and on average entered the workforce with more education than their parents' generation Due to the rise of dual-earner families, the boomers tended to rely more on forms of assistance, including eating out and day care, which generally required travel. These factors have caused the number of vehicles on the road to nearly triple over the past 40 years, during which time travel rates have also doubled, and total vehicle miles of travel grew at over twice the rate of population growth.

Recently, however, this longstanding pattern of increasing travel has changed direction, as overall travel rates have begun to decline. Some of this can be attributed to a poor economy, high gas prices, and the aging of the baby boomers, many of whom are entering retirement, a period typified by lower overall travel rates. Use of transit services, on the other hand, have shown a steady increase with the aging of the baby boomers; the number of trips for access to medical services has skyrocketed, another reflection of the aging of the baby boomer generation. Additionally the migration of many baby boomers to the suburbs has resulted in more than half of the US population now living in the suburbs, which also now contain more jobs than the central cities themselves. Future transportation policy must also accommodate this shift in population from dense urban areas to less dense suburban areas.

National Bus Rapid Transit Institute (NBRTI). *National Bus Rapid Transit Institute*. [Online] 2013. http://www.nbrti.org

This website serves as a clearinghouse for all things related to bus rapid transit (BRT). The NBRTI, funded by the Federal Transit Administration (FTA), collects and compiles data on BRT operations in the U.S. and around the world, and also conducts research on the mode.

Paisner, S. R. (2010, October 25). *Connecting the Dots: Energy, Environment, Transportation, Housing, Sustainability; An Integrated Approach Holds the Key to Achieving Mobility Goals.* Retrieved from Passenger Transport: the source for transportation news and analysis : http://newsmanager.commpartners.com/aptapt/issues/2010-10-25/14.html

This report from the 2010 APTA annual meeting notes the importance of developing an integrated approach to planning in regards to future public transportation projects. This require planning across different modes, agencies, and jurisdictions, not only in order to deliver efficient public transportation, but to ensure that those transit systems also consider economic growth and climate change as central issues as well. To this end, efforts are ongoing to increase public awareness of the importance of good public transportation, to rally taxpayer support for more transit and infrastructure investments.

Passenger Transport: News Headlines. (2012, December 14). *Ridership Continues Inrease for Seventh Consecutive Quarter.* Retrieved from Passenger Transport: the source for public transportation news and analysis : http://newsmanager.commpartners.com/aptapt/issues/2012-12-14/index.html

This article notes that US public transportation agencies have seen seven consecutive quarters of ridership increase, including growth across all major modes of transportation between January and September 2012, with the largest ridership growth coming from light rail and heavy rail. Nationally, bus ridership rose 1.8 percent from January through September 2012, during which time 28 of 37 large bus systems reported growth. Interviews with APTA officials stress the need for increased funding for public transportation in light of the growing demand and aging infrastructure. Also crucial is ensuring that public transportation provides access to major areas of employment, as work trips account for nearly 60 percent of public transportation trips.

Peddie, Matthew. Will SunRail Change Central Florida's Driving Habits? WNYC New York Public Radio-Transportation Nation. [Online] July 10, 2012. http://www.wnyc.org/blogs/transportation-nation/2012/jul/10/will-sunrail-change-central-floridas-driving-habits.

This article is a written version of an audio story that was played on an affiliate of New York Public Radio. Some developers are interviewed for the story about SunRail and its potential impacts on development around the stations. The article notes that, while the concept of transit-oriented development (TOD) is relatively new to Central Florida, developers are optimistic that the service will attract drivers from I-4 and help spur economic activity around the stations.

Pew Research Center. (2010, February 24). Millennials: Confident. Connected. Open to Change. *Pew Research Social and Demographic Trends* . Washington, D.C.: Pew Research Center. Retrieved from Pew Research Social & Demographic Trends : http://www.pewsocialtrends.org/2010/02/24/millennials-confident-connected-open-to-change/

This article offers an in depth look at the Millennial generation, encompassing Americans ages 18-29. Millennials are on track to become the most educated generation in American history, with over 39% of Millennials enrolled in college as of 2008. This is partially a result of the fact that millions of young Americans have enrolled in graduate programs, colleges or community colleges after being unable to find work in a struggling economy. As a result, 37% of Millennials are unemployed or out of the workforce,

although Millennials remain upbeat about the direction of the economy and the nation, much more so than their parents' generation.

Millennials generally have good relationships with their parents, and an increasing rate of young adults are returning back to live at home after a time on their own; roughly one-in-eight Millennials (age 22 and older) say they've had to return to living at home due to the poor economy. Millennials are far less religious than their parents' generation, and are also the most likely of any generation to self-identify as liberals. Millennials showed extremely strong support for Democrats and Barack Obama in the 2008 election, although this has waned considerably, as about half of Millennials believe Obama failed to achieve the fundamental change he promised.

Pew Research Center. (2013, February 7). Second Generation Americans: A Portrait of the Adult Children of Imigrants. *Pew Research Social & Demographic Trends* . Washington, D.C.: Pew Research Center. Retrieved from http://www.pewsocialtrends.org/2013/02/07/second-generation-americans/

During the recent Great Recession, young adults were able to shed substantially more debt than older adults did during the same time frame, despite running up record debt-to-income ratios during the previous decade. From 2007 to 2010, the median debt of households headed by an adult younger than 35 fell by 29 percent, compared with a decline of just 8 percent among households headed by adults age 35 and older. Also, the share of younger households holding debt of any kind fell to 78 percent, the lowest level since recording began in 1983.

A Pew Research study finds that this is mainly as a result of the younger generation not owning as many homes and cars, although another contributing factor is the declining share of young adults carrying credit card debt, down from 48 percent in 2007 to 39 percent in 2010. On the other hand, an increasing percentage of young adults have student loans, 40 percent in 2010 as compared to 34 percent in 2007, and just 26 percent in 2001. These shifts in the debt profile of younger adults reflect a broader societal shift toward delayed marriage and household formation that has been under way for decades.

Puente, M. (2011, September 9). *Downtown Tampa condos act as hub for self-contained living*. Retrieved from Tampa Bay Times : http://www.tampabay.com/news/business/realestate/downtown-tampa-condos-act-as-hub-for-self-contained-living/1190734

This article describes the recent resurgence in real estate occurring in downtown Tampa, where despite a weak economy and a stagnant housing market, young professionals and retirees are flocking to fill vacant apartments and condos as soon as they become available. In contrast to other parts of Tampa Bay and Florida in general, downtown Tampa has minimal foreclosures and short-sale listings, and a survey conducted by HCP & Associates reported that 85 percent of downtown Tampa residences were occupied. A 17,000 square foot gym opened downtown with just 300 customers in late 2008, in the midst of the Great Recession; today, its customer base has grown to 4,800.

Spurring the success of downtown Tampa is the renovation of many downtown areas and attractions, including the renovation of the Tampa Bay Times Forum, expansion of the streetcar service, and the opening of dozens of new bars and restaurants, and even the opening of a new dog park. All of these amenities allow residents to find nearly everything they need within walking distance of the downtown area, which is a large part of the appeal, not to mention the proximity to potential jobs. The convenience

of having so many amenities and opportunities so close to home has allowed downtown Tampa to prosper even in such hard times.

Shellenbarger, S. (2009, September 30). *The Next Youth-Magnet Cities* . Retrieved from The Wall Street Journal: http://online.wsj.com/article/SB10001424052748703787204574442912720525316.html

This article describes a survey of six experts, whose professions include demographers, economists, geographers, and authors on urban issues. The experts are asked to determine the 10 cities that will emerge as the hottest destinations for America's young adults (people in their 20s). The panelists' forecasts were dominated by big cities, as young adults place greater emphasis on moving to areas with large job markets. While migration between states was at its lowest level in 2008 since 1950, the population is expected to begin migrating again in greater numbers once the economy picks up steam. The top five cities chosen by the panelists were Washington, D.C., Seattle, New York, Portland, Ore., and Austin, Texas.

Szczepanski, C. (2011, October 19). *Five Ways Market Research Paints Bright Future for Public Transit.* Retrieved from Streetsblog Capitol Hill: http://dc.streetsblog.org/2011/10/19/five-ways-market-research-paints-bright-future-for-public-transit/

This website article reviews the claim that public transportation services are in for a large increase in ridership in light of consumer and demographic data, which tend to back the claim. The US population continues to grow, and people are also moving to urban areas at increasing rates, which will strain the public transportation systems of those areas. In addition, there are 76 million baby boomers who are just starting to reach retirement, and all signs point to them being more active and requiring a greater degree of transit services than previous generations of seniors.

The younger generation is also increasingly turning to transit, and an increasingly large number of young people are moving to areas that include walkable, bikeable, and transit-oriented neighborhoods. This is partially due to a weak economy, which has seen the number of Americans in debt increase to 46 million, making buying and maintaining a car an economic impossibility for many Americans. Another growing trend is "going green," which also encourages transit use. For these and other reasons, Generation Y is increasingly turning away from individual automobile ownership in favor of transit services.

Tracy, Dan. SunRail Studies Who Might Hop Aboard Commuter Train. Orlando Sentinel. [Online] April 15, 2012. http://articles.orlandosentinel.com/2012-04-15/business/os-sunrail-riders-durvey-20120415_1_sunrail-train-commuter.

This article from the Orlando Sentinel presents information compiled from those advancing the SunRail system on who might comprise ridership on the new rail service. Opening day ridership for the service is forecast to be 4,300. The primary target for the service is "choice" car commuters on I-4. SunRail also expects to attract those who are environmentally concerned, those who believe the service will be cheaper than driving, and those aged 18 to 30 who do not have cars or who do not want them.

Trigaux, R. (2012, April 6). *As growth shifts, Florida may need to rethink economic strategy.* Retrieved from Tampa Bay Times : http://www.tampabay.com/news/business/realestate/trends-say-pick-up-economic-education-pace-or-get-left-behind/1234439

This article examines population migration shifts in the Unites States following the Great Recession. Citing figures from the U.S. Census, the article focuses on the shift in population from the exurbs to accessible downtown areas, noting that for the first time in at least 20 years, the annual rate of growth in American cities and surrounding urban areas has surpassed that of exurbs. The appeal of sprawl is waning in the face of hard economic times and high gas prices.

Trigaux, R. (2012, June 8). *Trends say: Pick up economic, education pace or get left behind*. Retrieved from Tampa Bay Times : http://www.tampabay.com/news/business/realestate/trends-say-pick-up-economic-education-pace-or-get-left-behind/1234439

This article summarizes the conclusions of real estate gurus and transit professionals who gathered for the Urban Land Institute Florida Summit, where the consensus is that the United States needs to pick up the pace in regards to education and economic performance. The article summarizes some notable conclusions from the conference, including the fact that the United States is falling behind other developed countries in terms of educational attainment. Also, the current generation of young adults is poorer than their parents' generation was, as young adults today are saddled with student loans, among other forms of debt; this widespread debt problem among today's young adults has caused mortgage lending to become more conservative, making it even harder for young people to buy homes. Indeed, many are shying away from homeownership in favor of living in cities with good public transit, foregoing the need for a car as well. Many less fortunate young adults, unable to find jobs, have moved back home with their parents; of the college class of 2008, 40 percent still live with their parents.

ULI- the Urban Land Institute. (2005). *Building Florida's Future: State Strategies for Regional Cooperation.* Washington, D.C.: ULI- the Urban Land Institute.

This report by the Urban Land Institute (ULI) examines Florida's evolving economy, transportation system, and population, to better prepare transit systems and infrastructure for future demand. The report stresses the necessity of regional cooperation in order to effectively accommodate the expected population growth and anticipated increased demand for transit services. Florida has grown tremendously in terms of population and transportation needs over the past 40 years, and continued growth requires careful planning to ensure that land use and transportation needs are managed effectively and equitably.

The report goes on to outline successful examples of regional cooperation occurring throughout Florida today, to help provide models for future efforts at the regional level. The report also outlines potential barriers to regional cooperation, and how best to combat these obstacles. Finally, the ULI Florida Committee for Regional Cooperation makes recommendations concerning how best Florida can promote and encourage regional cooperation.

Urban Land Institute. (2011). *What's Next? Real Estate in the New Economy.* Washington, D.C.: Urban Land Institute.

This report by the Urban Land Institute examines trends in real estate and the economy, and tries to offer predictions and recommendations for future growth. The decades-long trend of companies relocating

from older factories in the Northeast and Midwest in higher-cost pro-union states, to right-to-work states in the South and Southwest that are cheaper to operate from, remains a potent force in relocating businesses and jobs. Educational attainment is becoming an increasingly important factor, as the variation by region in higher education attainment rates continues to grow. Businesses and youth want to relocate to communities with higher education rates; recent graduates are attracted by the good jobs. The report also notes the importance of upgrading an aging infrastructure system, in the face of rising transportation costs and increasing rates of public transportation use.

The report also focuses on the importance of both the Baby Boomers and Generation Y. The young adults of America who compose Generation Y are migrating towards urban areas in large numbers, where they have access to a large job market and numerous social and entertainment options to choose from. The Baby Boomers, for their part, show less interest than their predecessors in relocating to retirement homes, and may stay in the workforce longer. Also, the combined effects of both lengthening lifespan and waning savings could mean that an increasing number of elderly people outlive their supply of resources. The longstanding trend of seniors relocating to warm weather climates is expected to continue, albeit at a slightly lower rate, as more seniors stay in place or relocate to be closer to their families and grandchildren.

Wyatt, K. (2012, June 28). *Young Adults Choose Cities Over Suburban Living As 'Generation Rent' Faces Tough Economy*. Retrieved from Huffington Post : http://www.huffingtonpost.com/2012/06/28/young-adults-cities-generation-rent_n_1632952.html

For the first time in the past century, America's largest cities are growing at a faster rate than their surrounding suburbs, a shift fueled by young adults. These young Americans, ages 18-29, who comprise "generation rent" are attracted by potential job opportunities. Faced with the prospect of paying off large amounts of student debt, many young people are delaying marriage and homeownership in the suburbs in favor of short-term, far cheaper apartment-living in larger cities, which also have the advantages of robust public transit networks and proximity to potential jobs. This has led developers to place a big focus in building new residences near transportation hubs.

The lower level of homeownership among "generation rent" is also due to the fact that today's young adults face stricter mortgage requirements and mounting college debt. From 2009 to 2011, just 9 percent of 29 to 34-year-olds were approved for a first-time mortgage. Combined with low earnings, which delay the ability to amass the necessary down payments, this means that young adults are expected to continue renting in large numbers for some time.

APPENDIX B: Florida Urban Fixed-Route Transit Statistics

Table B1: Florida Urban Fixed-Route Transit Systems: Service Area Population and Average Fare

System	Service Area Pop.		Percent Change	Average Fare		Percent Change
	2000	2010		2000	2010	
Bay Town Trolley	122,901	85,458	-30.5%	$0.31	$0.62	100.9%
Broward County Transit (& Community Bus)	1,337,000	1,766,476	32.1%	$0.51	$0.69	35.2%
Collier Area Transit	n/a	333,032	n/a	n/a	$0.96	n/a
Escambia County Area Transit	261,647	307,220	17.4%	$0.53	$1.06	99.2%
Gainesville Regional Transit System	140,000	151,294	8.1%	$0.13	$1.09	741.8%
Hernando Express Bus (TransHernando Express)	n/a	165,843	n/a	n/a	$0.74	n/a
Hillsborough Area Regional Transit	1,001,910	821,306	-18.0%	$0.66	$0.93	41.6%
Indian River GoLine	109,000	117,237	7.6%	$0.23	$0.00	-100.0%
Jacksonville Transportation Authority	834,337	853,300	2.3%	$0.69	$0.78	13.4%
Lake County LakeXpress	n/a	97,497	n/a	n/a	$0.45	n/a
Lakeland Area Mass Transit District	110,000	110,000	0.0%	$0.44	$0.79	78.4%
Lee County Transit	426,463	443,696	4.0%	$0.53	$0.75	40.6%
LYNX Transit	1,357,852	1,805,921	33.0%	$0.61	$0.85	40.0%
Manatee County Area Transit	253,207	103,000	-59.3%	$0.42	$0.51	22.4%
Martin County	n/a	137,956	n/a	n/a	$0.59	n/a
Miami-Dade Transit	1,800,000	2,500,625	38.9%	$0.77	$1.01	31.1%
Ocala (SunTran)	59,214	n/a	n/a	$0.63	n/a	n/a
Okaloosa County Transit (The Wave)	n/a	170,498	n/a	n/a	$0.65	n/a
Palm Beach County Transportation Agency	791,904	982,900	24.1%	$0.70	$0.62	-10.9%
Pasco County Public Transportation	326,494	471,709	44.5%	$0.22	$1.04	374.6%
Pinellas Suncoast Transit Authority	833,504	871,480	4.6%	$0.81	$0.86	6.1%
Polk County Transit Svcs. Div. & WHAT	86,427	153,924	78.1%	$0.42	$0.53	26.8%
Sarasota County Area Transit	278,800	393,826	41.3%	$0.40	$0.39	-2.1%
S. Florida Regional Transportation Authority	4,659,187	5,448,962	17.0%	$2.30	$2.54	10.5%
Space Coast Area Transit	489,700	554,354	13.2%	$1.29	$0.59	-54.5%
St. Lucie County Council on Aging	n/a	266,502	n/a	n/a	$0.54	n/a
StarMetro (Tallahassee)	147,490	162,310	10.0%	$0.65	$0.85	30.9%
Sunshine Bus (St. Johns County)	n/a	149,300	n/a	n/a	$0.49	n/a
Volusia County dba VOTRAN	420,431	468,670	11.5%	$0.34	$0.75	121.7%

Source: National Transit Database

Table B2: Florida Urban Fixed-Route Transit Systems: Passenger Trips and Revenue Miles

System	Passenger Trips		Percent Change	Revenue Miles		Percent Change
	2000	2010		2000	2010	
Bay Town Trolley	66,482	724,613	989.9%	158,158	625,828	295.7%
Broward County Transit (& Community Bus)	29,073,676	38,670,324	33.0%	12,013,192	16,372,108	36.3%
Collier Area Transit	n/a	1,064,910	n/a	n/a	1,230,055	n/a
Escambia County Area Transit	1,629,206	1,152,375	-29.3%	1,387,413	1,388,505	0.1%
Gainesville Regional Transit System	5,180,872	9,373,060	80.9%	1,855,587	2,808,703	51.4%
Hernando Express Bus (TransHernando Express)	n/a	69,945	n/a	n/a	147,415	n/a
Hillsborough Area Regional Transit	9,237,162	13,233,764	43.3%	5,843,048	8,280,099	41.7%
Indian River GoLine	153,768	707,402	360.0%	226,524	564,322	149.1%
Jacksonville Transportation Authority	8,736,406	11,227,845	28.5%	7,455,869	9,384,591	25.9%
Lake County LakeXpress	n/a	232,794	n/a	n/a	384,653	n/a
Lakeland Area Mass Transit District	1,358,985	1,459,429	7.4%	1,099,459	1,274,537	15.9%
Lee County Transit	2,273,959	3,035,272	33.5%	2,845,415	3,241,809	13.9%
LYNX Transit	21,006,463	24,970,296	18.9%	12,680,866	15,776,292	24.4%
Manatee County Area Transit	658,066	1,441,558	119.1%	751,374	1,328,753	76.8%
Martin County	n/a	4,626	n/a	n/a	67,278	n/a
Miami-Dade Transit	84,131,473	96,285,797	14.4%	31,187,342	40,255,102	29.1%
Ocala (SunTran)	154,719	n/a	n/a	317,548	n/a	n/a
Okaloosa County Transit (The Wave)	n/a	162,820	n/a	n/a	407,695	n/a
Palm Beach County Transportation Agency	6,463,416	10,343,531	60.0%	6,966,949	6,954,202	-0.2%
Pasco County Public Transportation	136,142	779,606	472.6%	450,032	1,088,923	142.0%
Pinellas Suncoast Transit Authority	9,360,135	12,811,835	36.9%	6,776,511	9,000,501	32.8%
Polk County Transit Svcs. Div. & WHAT	97,330	473,353	386.3%	183,875	725,738	294.7%
Sarasota County Area Transit	1,620,586	2,733,015	68.6%	1,635,128	2,794,925	70.9%
S. Florida Regional Transportation Authority	2,232,497	4,050,353	81.4%	1,819,317	3,368,257	85.1%
Space Coast Area Transit	302,322	1,733,519	473.4%	627,811	2,553,709	306.8%
St. Lucie County Council on Aging	n/a	173,250	n/a	n/a	336,477	n/a
StarMetro (Tallahassee)	3,922,150	4,762,233	21.4%	1,678,460	1,979,694	17.9%
Sunshine Bus (St. Johns County)	n/a	185,863	n/a	n/a	457,381	n/a
Volusia County dba VOTRAN	4,056,472	3,329,232	-17.9%	2,619,745	3,014,826	15.1%

Source: National Transit Database

APPENDIX C: Calculation of Projected 2017 UZA Data

A part of this project involved using data acquired from the Environmental Systems Research Institute (ESRI) to provide population and age projections for the year 2017 based on U.S. Census data. It should be noted that the 2017 projections are the latest available for inclusion in this report.

To calculate the projected 2017 urbanized area (UZA) population and other statistics, it was necessary to calculate the proportion which the 2010 urbanized area overlapped the 2010census block groups. Each 2010 block group was assigned a value representing the square meters within the urbanized area and a code representing the urbanized area it overlapped. To calculate each block group's 2017 urbanized area population the proportion of the block group's total area and the block group's urbanized area were multiplied by the block group's 2017 total population projection provided by ESRI. For each urbanized area, the total 2017 population and age distribution was calculated by summing the block group by the urbanized area code. Through this process, the 2017 project population was derived. It is important to note the limitation of this methodology. Primarily, this methodological approach relies upon the assumption that the population across the zone (block group) is uniformly distributed. However, for block groups that reside along the fringe of the urbanized area boundary and that are split or divided by the urbanized area this can present a unique challenge resulting in an underestimation of the 2017 urbanized area calculation. Further, given that urbanized area boundaries represent contiguous population centers, the urbanized area would expand to encapsulate the growth within an edge block group. But, since this analysis is relying on the 2010 urbanized area boundary any population growth that occurred within an edge block group would not completely fall within the existing urbanized area.

Figure C1 below shows that the population is not uniformly distributed within a census tract and illustrates the challenge more clearly, using the Pensacola UZA as an example. As the population within the block group grows, some of the growth can occur outside the urbanized area boundary. In Figure C2, a close-up with aerial photography further illustrates how growth can occur outside the urban area boundary. In fact, in suburban settings typically on the edge of urbanized area boundaries, the growth only occurs in unpopulated and undeveloped sections of the tract.

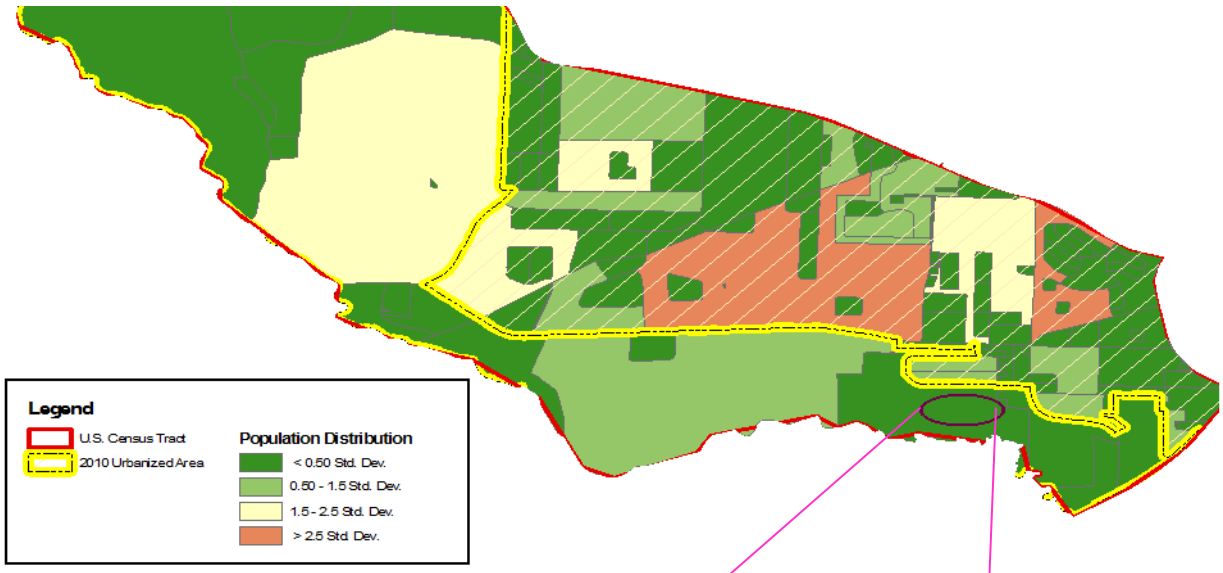

Figure C1: Distribution of Population across Block Group (in Pensacola UZA)

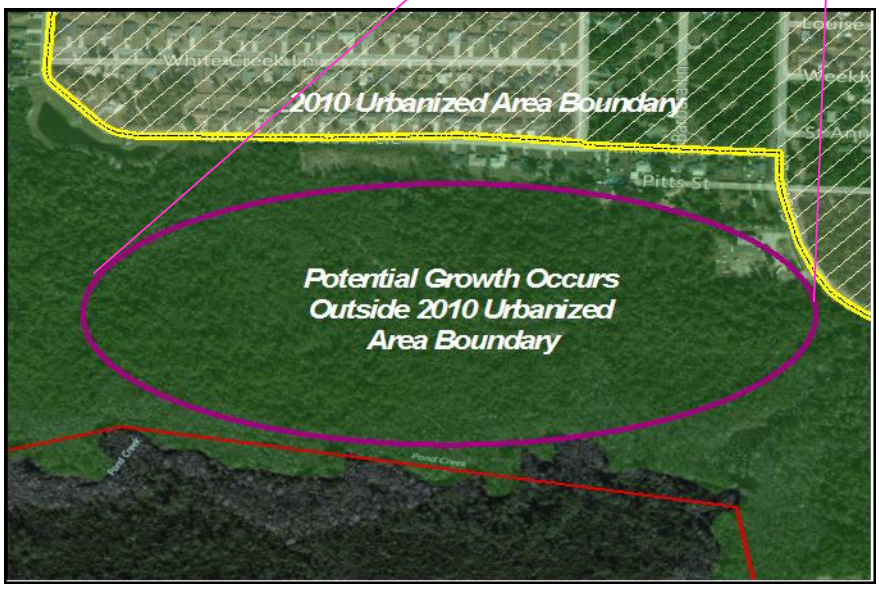

Figure C2: Undeveloped Land Close-Up

Consequently, assuming the census tract population is uniformly distributed across the zone can lead to inaccuracies in the proportion estimate and ultimately underestimating the total and percent of the 2017 population within urbanized area. Considering these limitations, the 2017 projections used in this report are assumed to be reasonable estimates.

APPENDIX D: Data Tables

Table D1: Florida UZA Population Statistics – 2000 and 2010 Actual, 2017 Projected

Florida Urbanized Area	Population			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Bonita Springs	221,251	310,298	331,261	40.25%	6.76%	49.72%
Cape Coral	329,757	530,290	562,830	60.81%	6.14%	70.68%
Deltona	147,713	182,169	183,705	23.33%	0.84%	24.37%
Fort Walton Beach--Navarre--Wright	152,741	191,917	198,138	25.65%	3.24%	29.72%
Gainesville	159,508	187,781	196,139	17.73%	4.45%	22.96%
Homosassa Springs--Beverly Hills--Citrus Springs	n/a	80,962	82,084	n/a	1.39%	n/a
Jacksonville	882,295	1,065,219	1,113,823	20.73%	4.56%	26.24%
Kissimmee	186,667	314,071	342,986	68.25%	9.21%	83.74%
Lady Lake--The Villages	50,721	112,991	128,974	122.77%	14.15%	154.28%
Lakeland	199,487	262,596	275,163	31.64%	4.79%	37.94%
Leesburg--Eustis--Tavares	97,497	131,337	138,945	34.71%	5.79%	42.51%
Miami	4,919,036	5,502,379	5,684,677	11.86%	3.31%	15.56%
North Port--Port Charlotte	122,421	169,541	177,150	38.49%	4.49%	44.71%
Ocala	106,542	156,909	165,413	47.27%	5.42%	55.26%
Orlando	1,157,431	1,510,516	1,595,224	30.51%	5.61%	37.82%
Palm Bay--Melbourne	393,289	452,791	464,421	15.13%	2.57%	18.09%
Palm Coast--Daytona Beach--Port Orange	255,353	349,064	357,008	36.70%	2.28%	39.81%
Panama City	132,419	143,280	148,316	8.20%	3.51%	12.01%
Pensacola	323,783	340,067	350,537	5.03%	3.08%	8.26%
Port St. Lucie	270,774	376,047	390,625	38.88%	3.88%	44.26%
Sarasota--Bradenton	559,229	643,260	656,646	15.03%	2.08%	17.42%
Sebastian--Vero Beach South--Florida Ridge	120,962	149,422	156,034	23.53%	4.43%	28.99%
Sebring--Avon Park	n/a	61,625	61,413	n/a	-0.34%	n/a
Spring Hill	102,193	148,220	152,770	45.04%	3.07%	49.49%
St. Augustine	53,519	69,173	77,813	29.25%	12.49%	45.39%
Tallahassee	204,260	240,223	252,140	17.61%	4.96%	23.44%
Tampa--St. Petersburg	2,062,339	2,441,770	2,561,661	18.40%	4.91%	24.21%
Titusville	52,922	54,386	56,506	2.77%	3.90%	6.77%
Winter Haven	153,924	201,289	207,441	30.77%	3.06%	34.77%
Zephyrhills	53,979	66,609	66,220	23.40%	-0.58%	22.68%
Florida Urbanized Area Total	13,472,012	16,446,202	17,136,063	22.08%	4.19%	27.20%

Source: U.S. Census and ESRI

Table D2: Florida Relevant County Population Statistics
2000 and 2010 Actual, 2015 and 2020 Projected

Florida County	Population				Percent Change			
	2000	2010	2015	2020	2000-2010	2010-2020	2015-2020	2000-2020
Alachua	217,955	247,336	255,600	268,300	13.48%	8.48%	4.97%	23.10%
Bay	148,217	168,852	174,900	185,500	13.92%	9.86%	6.06%	25.15%
Brevard	476,230	543,376	561,200	591,500	14.10%	8.86%	5.40%	24.20%
Broward	1,623,018	1,748,066	1,775,300	1,816,200	7.70%	3.90%	2.30%	11.90%
Charlotte	141,627	159,978	164,800	173,100	12.96%	8.20%	5.04%	22.22%
Citrus	118,085	141,236	146,600	157,200	19.61%	11.30%	7.23%	33.12%
Clay	140,814	190,865	204,800	229,200	35.54%	20.08%	11.91%	62.77%
Collier	251,377	321,520	342,000	375,600	27.90%	16.82%	9.82%	49.42%
Duval	778,879	864,263	887,200	928,200	10.96%	7.40%	4.62%	19.17%
Escambia	294,410	297,619	301,300	305,400	1.09%	2.61%	1.36%	3.73%
Flagler	49,832	95,696	108,500	129,900	92.04%	35.74%	19.72%	160.68%
Hernando	130,802	172,778	184,300	204,400	32.09%	18.30%	10.91%	56.27%
Highlands	87,366	98,786	101,500	106,800	13.07%	8.11%	5.22%	22.24%
Hillsborough	998,948	1,229,226	1,302,500	1,420,400	23.05%	15.55%	9.05%	42.19%
Indian River	112,947	138,028	145,600	158,500	22.21%	14.83%	8.86%	40.33%
Lake	210,527	297,052	321,200	361,800	41.10%	21.80%	12.64%	71.85%
Lee	440,888	618,754	675,000	763,300	40.34%	23.36%	13.08%	73.13%
Leon	239,452	275,487	283,200	296,200	15.05%	7.52%	4.59%	23.70%
Manatee	264,002	322,833	341,600	370,700	22.28%	14.83%	8.52%	40.42%
Marion	258,916	331,298	351,800	388,300	27.96%	17.21%	10.38%	49.97%
Martin	126,731	146,318	151,600	160,900	15.46%	9.97%	6.13%	26.96%
Miami-Dade	2,253,779	2,496,435	2,591,800	2,717,700	10.77%	8.86%	4.86%	20.58%
Okaloosa	170,498	180,822	184,900	191,500	6.06%	5.91%	3.57%	12.32%
Orange	896,344	1,145,956	1,226,900	1,355,700	27.85%	18.30%	10.50%	51.25%
Osceola	172,493	268,685	303,400	353,100	55.77%	31.42%	16.38%	104.70%
Palm Beach	1,131,191	1,320,134	1,372,700	1,461,300	16.70%	10.69%	6.45%	29.18%
Pasco	344,768	464,697	498,000	554,400	34.79%	19.30%	11.33%	60.80%
Pinellas	921,495	916,542	917,500	915,500	-0.54%	-0.11%	-0.22%	-0.65%
Polk	483,924	602,095	640,000	698,900	24.42%	16.08%	9.20%	44.42%
Santa Rosa	117,743	151,372	164,700	181,800	28.56%	20.10%	10.38%	54.40%
Sarasota	325,961	379,448	394,800	420,200	16.41%	10.74%	6.43%	28.91%
Seminole	365,199	422,718	438,100	463,700	15.75%	9.69%	5.84%	26.97%
St. Johns	123,135	190,039	213,900	247,700	54.33%	30.34%	15.80%	101.16%
St. Lucie	192,695	277,789	304,600	346,600	44.16%	24.77%	13.79%	79.87%
Sumter	53,345	93,420	110,000	130,800	75.12%	40.01%	18.91%	145.20%
Volusia	443,343	494,593	506,000	526,400	11.56%	6.43%	4.03%	18.73%
Walton	40,601	55,043	59,400	66,700	35.57%	21.18%	12.29%	64.28%
Florida Total	15,982,378	18,801,310	19,665,000	21,021,600	17.64%	11.81%	6.90%	31.53%

Source: U.S. Census and BEBR

Table D3: Florida UZA Age Statistics (≤17) – 2000 and 2010 Actual, 2017 Projected

Florida Urbanized Area	Population Age ≤17			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Bonita Springs	17.48%	16.55%	15.41%	-5.32%	-6.89%	-11.85%
Cape Coral	19.67%	20.41%	19.41%	3.76%	-4.94%	-1.36%
Deltona	24.00%	23.00%	21.96%	-4.19%	-4.50%	-8.50%
Fort Walton Beach--Navarre--Wright	24.40%	21.95%	21.32%	-10.03%	-2.86%	-12.60%
Gainesville	18.01%	16.67%	16.28%	-7.46%	-2.31%	-9.60%
Homosassa Springs--Beverly Hills--Citrus Springs	n/a	17.04%	15.72%	n/a	-7.75%	n/a
Jacksonville	26.41%	24.30%	23.66%	-8.00%	-2.61%	-10.40%
Kissimmee	26.05%	24.88%	24.39%	-4.49%	-1.97%	-6.37%
Lady Lake--The Villages	13.70%	8.59%	7.41%	-37.33%	-13.69%	-45.91%
Lakeland	24.81%	24.21%	23.35%	-2.43%	-3.56%	-5.91%
Leesburg--Eustis--Tavares	18.83%	17.56%	16.86%	-6.78%	-3.97%	-10.47%
Miami	23.43%	21.62%	20.92%	-7.74%	-3.21%	-10.70%
North Port--Port Charlotte	16.54%	17.60%	16.58%	6.35%	-5.76%	0.22%
Ocala	24.00%	20.94%	20.04%	-12.74%	-4.29%	-16.49%
Orlando	25.21%	23.58%	23.03%	-6.48%	-2.31%	-8.64%
Palm Bay--Melbourne	22.15%	20.16%	19.31%	-8.99%	-4.21%	-12.82%
Palm Coast--Daytona Beach--Port Orange	17.81%	17.15%	16.36%	-3.69%	-4.63%	-8.15%
Panama City	24.01%	21.72%	21.14%	-9.54%	-2.66%	-11.95%
Pensacola	23.94%	21.74%	21.10%	-9.19%	-2.93%	-11.84%
Port St. Lucie	21.31%	21.07%	20.21%	-1.15%	-4.06%	-5.17%
Sarasota--Bradenton	17.65%	16.94%	15.94%	-3.99%	-5.94%	-9.70%
Sebastian--Vero Beach South—Florida Ridge	17.24%	17.09%	16.16%	-0.85%	-5.44%	-6.24%
Sebring--Avon Park	n/a	18.52%	17.26%	n/a	-6.77%	n/a
Spring Hill	17.78%	19.58%	18.36%	10.13%	-6.24%	3.26%
St. Augustine	19.34%	17.06%	16.09%	-11.78%	-5.66%	-16.77%
Tallahassee	20.17%	19.01%	18.65%	-5.73%	-1.91%	-7.54%
Tampa--St. Petersburg	21.99%	21.37%	20.79%	-2.84%	-2.71%	-5.47%
Titusville	22.78%	20.21%	19.47%	-11.28%	-3.67%	-14.54%
Winter Haven	24.21%	23.48%	22.29%	-3.05%	-5.05%	-7.95%
Zephyrhills	18.62%	17.65%	16.69%	-5.23%	-5.40%	-10.35%
Florida Urbanized Area Total	22.67%	21.22%	20.50%	-6.38%	-3.40%	-9.56%

Source: U.S. Census and ERSI

Table D4: Florida UZA Age Statistics (18-34) – 2000 and 2010 Actual, 2017 Projected

Florida Urbanized Area	Population Age 18-34			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Bonita Springs	16.14%	15.21%	14.32%	-5.75%	-5.83%	-11.24%
Cape Coral	16.95%	18.99%	18.19%	12.03%	-4.23%	7.29%
Deltona	19.29%	20.33%	19.51%	5.37%	-4.06%	1.09%
Fort Walton Beach--Navarre--Wright	22.82%	22.94%	22.40%	0.50%	-2.36%	-1.87%
Gainesville	45.14%	44.64%	43.55%	-1.11%	-2.44%	-3.53%
Homosassa Springs--Beverly Hills--Citrus Springs	n/a	13.28%	12.57%	n/a	-5.33%	n/a
Jacksonville	24.26%	23.98%	23.54%	-1.16%	-1.86%	-2.99%
Kissimmee	25.71%	26.22%	25.72%	1.98%	-1.89%	0.06%
Lady Lake--The Villages	10.61%	7.55%	6.44%	-28.88%	-14.64%	-39.29%
Lakeland	21.33%	21.72%	21.07%	1.82%	-3.01%	-1.24%
Leesburg--Eustis--Tavares	15.06%	15.13%	14.42%	0.44%	-4.67%	-4.25%
Miami	21.74%	21.77%	21.36%	0.15%	-1.88%	-1.73%
North Port--Port Charlotte	12.41%	14.25%	13.48%	14.79%	-5.40%	8.59%
Ocala	19.57%	18.29%	17.40%	-6.55%	-4.87%	-11.11%
Orlando	26.09%	26.31%	25.85%	0.83%	-1.74%	-0.92%
Palm Bay--Melbourne	17.79%	18.46%	17.85%	3.80%	-3.33%	0.34%
Palm Coast--Daytona Beach--Port Orange	18.60%	18.28%	17.43%	-1.72%	-4.64%	-6.28%
Panama City	22.09%	22.73%	22.02%	2.92%	-3.12%	-0.29%
Pensacola	24.75%	25.38%	24.60%	2.56%	-3.08%	-0.60%
Port St. Lucie	16.08%	17.45%	16.73%	8.55%	-4.13%	4.07%
Sarasota--Bradenton	15.28%	15.16%	14.38%	-0.82%	-5.12%	-5.89%
Sebastian--Vero Beach South--Florida Ridge	13.28%	14.32%	13.67%	7.83%	-4.58%	2.89%
Sebring--Avon Park	n/a	15.64%	14.58%	n/a	-6.83%	n/a
Spring Hill	13.57%	15.50%	14.69%	14.25%	-5.20%	8.30%
St. Augustine	19.51%	20.90%	19.87%	7.14%	-4.95%	1.83%
Tallahassee	38.74%	39.86%	38.77%	2.89%	-2.75%	0.06%
Tampa--St. Petersburg	20.78%	21.36%	21.01%	2.80%	-1.66%	1.09%
Titusville	16.66%	18.28%	17.43%	9.71%	-4.66%	4.60%
Winter Haven	19.04%	19.55%	18.58%	2.71%	-5.00%	-2.42%
Zephyrhills	14.71%	16.82%	15.84%	14.31%	-5.84%	7.63%
Florida Urbanized Area Total	21.59%	21.71%	21.18%	0.55%	-2.47%	-1.93%

Source: U.S. Census and ERSI

Table D5: Florida UZA Age Statistics (35-54) – 2000 and 2010 Actual, 2017 Projected

Florida Urbanized Area	Population Age 35-54			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Bonita Springs	25.00%	22.26%	19.70%	-10.95%	-11.50%	-21.19%
Cape Coral	25.96%	25.07%	22.54%	-3.40%	-10.09%	-13.15%
Deltona	28.40%	27.37%	25.07%	-3.63%	-8.43%	-11.75%
Fort Walton Beach--Navarre--Wright	31.18%	28.47%	26.03%	-8.69%	-8.59%	-16.53%
Gainesville	22.39%	20.06%	18.74%	-10.39%	-6.56%	-16.27%
Homosassa Springs--Beverly Hills--Citrus Springs	n/a	22.17%	19.77%	n/a	-10.80%	n/a
Jacksonville	30.84%	28.92%	26.69%	-6.22%	-7.72%	-13.46%
Kissimmee	30.02%	28.74%	26.66%	-4.26%	-7.24%	-11.19%
Lady Lake--The Villages	17.54%	12.07%	9.97%	-31.17%	-17.42%	-43.16%
Lakeland	27.77%	26.09%	23.88%	-6.06%	-8.46%	-14.02%
Leesburg--Eustis--Tavares	22.49%	20.81%	18.95%	-7.45%	-8.96%	-15.74%
Miami	29.25%	29.12%	26.64%	-0.46%	-8.50%	-8.92%
North Port--Port Charlotte	22.43%	22.95%	20.45%	2.31%	-10.90%	-8.85%
Ocala	26.25%	23.63%	21.48%	-9.95%	-9.10%	-18.14%
Orlando	30.68%	28.86%	26.73%	-5.94%	-7.39%	-12.88%
Palm Bay--Melbourne	30.25%	28.31%	25.60%	-6.41%	-9.56%	-15.36%
Palm Coast--Daytona Beach--Port Orange	27.11%	24.88%	22.31%	-8.20%	-10.34%	-17.69%
Panama City	30.70%	28.19%	25.80%	-8.19%	-8.47%	-15.97%
Pensacola	28.61%	26.23%	24.01%	-8.32%	-8.43%	-16.05%
Port St. Lucie	27.30%	26.40%	23.80%	-3.31%	-9.87%	-12.85%
Sarasota--Bradenton	25.51%	23.63%	20.93%	-7.39%	-11.41%	-17.96%
Sebastian--Vero Beach South--Florida Ridge	24.23%	23.29%	20.68%	-3.87%	-11.20%	-14.63%
Sebring--Avon Park	n/a	20.16%	17.97%	n/a	-10.85%	n/a
Spring Hill	22.62%	24.03%	21.52%	6.24%	-10.43%	-4.84%
St. Augustine	29.94%	25.52%	22.80%	-14.75%	-10.68%	-23.86%
Tallahassee	26.26%	22.04%	20.57%	-16.08%	-6.65%	-21.66%
Tampa--St. Petersburg	29.73%	28.46%	26.03%	-4.25%	-8.56%	-12.45%
Titusville	28.16%	27.28%	24.71%	-3.12%	-9.43%	-12.25%
Winter Haven	25.10%	24.24%	21.89%	-3.46%	-9.68%	-12.81%
Zephyrhills	21.39%	21.11%	19.07%	-1.30%	-9.66%	-10.84%
Florida Urbanized Area Total	28.71%	27.40%	25.01%	-4.58%	-8.74%	-12.92%

Source: U.S. Census and ERSI

Table D6: Florida UZA Age Statistics (55-64) – 2000 and 2010 Actual, 2017 Projected

Florida Urbanized Area	Population Age 55-64			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Bonita Springs	13.66%	14.72%	15.36%	7.81%	4.33%	12.48%
Cape Coral	11.77%	13.43%	14.39%	14.12%	7.15%	22.28%
Deltona	9.30%	12.32%	13.62%	32.41%	10.59%	46.43%
Fort Walton Beach--Navarre--Wright	9.49%	12.17%	13.22%	28.23%	8.60%	39.25%
Gainesville	5.74%	9.24%	10.24%	60.88%	10.86%	78.35%
Homosassa Springs--Beverly Hills--Citrus Springs	n/a	15.14%	15.93%	n/a	5.22%	n/a
Jacksonville	8.00%	11.64%	12.77%	45.41%	9.77%	59.61%
Kissimmee	7.84%	9.98%	11.02%	27.42%	10.35%	40.60%
Lady Lake--The Villages	17.61%	19.25%	19.11%	9.29%	-0.74%	8.48%
Lakeland	9.53%	11.88%	12.92%	24.63%	8.72%	35.50%
Leesburg--Eustis--Tavares	11.86%	14.40%	15.02%	21.37%	4.32%	26.61%
Miami	8.99%	11.48%	12.44%	27.67%	8.35%	38.33%
North Port--Port Charlotte	13.43%	15.15%	15.95%	12.84%	5.25%	18.77%
Ocala	9.80%	12.15%	13.15%	23.96%	8.21%	34.15%
Orlando	7.70%	10.64%	11.70%	38.12%	10.01%	51.95%
Palm Bay--Melbourne	10.63%	13.50%	14.54%	27.00%	7.68%	36.75%
Palm Coast--Daytona Beach--Port Orange	11.55%	15.28%	16.26%	32.27%	6.43%	40.77%
Panama City	9.80%	12.45%	13.54%	27.00%	8.80%	38.18%
Pensacola	9.20%	12.22%	13.30%	32.79%	8.80%	44.47%
Port St. Lucie	10.91%	13.12%	14.05%	20.17%	7.13%	28.74%
Sarasota--Bradenton	12.08%	15.07%	15.88%	24.75%	5.41%	31.50%
Sebastian--Vero Beach South--Florida Ridge	11.70%	14.89%	15.69%	27.27%	5.42%	34.16%
Sebring--Avon Park	n/a	12.98%	13.73%	n/a	5.82%	n/a
Spring Hill	12.27%	13.82%	14.75%	12.62%	6.71%	20.18%
St. Augustine	11.51%	15.85%	17.14%	37.73%	8.12%	48.91%
Tallahassee	6.46%	10.01%	11.12%	54.89%	11.04%	72.00%
Tampa--St. Petersburg	9.48%	12.54%	13.49%	32.22%	7.60%	42.26%
Titusville	11.95%	13.54%	14.57%	13.30%	7.62%	21.93%
Winter Haven	10.29%	12.30%	13.36%	19.59%	8.59%	29.86%
Zephyrhills	11.16%	13.35%	14.19%	19.62%	6.24%	27.09%
Florida Urbanized Area Total	9.43%	12.22%	13.19%	29.58%	7.95%	39.87%

Source: U.S. Census and ERSI

Table D7: Florida UZA Age Statistics (65+) – 2000 and 2010 Actual, 2017 Projected

Florida Urbanized Area	Population Age 65+			Percent Change		
	2000	2010	2017	2000-2010	2010-2017	2000-2017
Bonita Springs	27.72%	31.25%	35.20%	12.73%	12.64%	26.98%
Cape Coral	25.65%	22.09%	25.47%	-13.88%	15.32%	-0.69%
Deltona	19.00%	16.98%	19.85%	-10.60%	16.86%	4.47%
Fort Walton Beach--Navarre--Wright	12.11%	14.47%	17.03%	19.50%	17.75%	40.71%
Gainesville	8.72%	9.40%	11.18%	7.73%	19.03%	28.24%
Homosassa Springs--Beverly Hills--Citrus Springs	n/a	32.38%	36.01%	n/a	11.22%	n/a
Jacksonville	10.49%	11.17%	13.34%	6.48%	19.46%	27.20%
Kissimmee	10.39%	10.18%	12.21%	-2.01%	19.96%	17.55%
Lady Lake--The Villages	40.54%	52.55%	57.07%	29.62%	8.61%	40.78%
Lakeland	16.55%	16.10%	18.79%	-2.71%	16.70%	13.54%
Leesburg--Eustis--Tavares	31.76%	32.11%	34.75%	1.10%	8.24%	9.43%
Miami	16.59%	16.02%	18.64%	-3.45%	16.35%	12.34%
North Port--Port Charlotte	35.18%	30.06%	33.55%	-14.58%	11.61%	-4.65%
Ocala	20.38%	24.99%	27.93%	22.59%	11.77%	37.02%
Orlando	10.31%	10.61%	12.68%	2.92%	19.50%	23.00%
Palm Bay--Melbourne	19.18%	19.57%	22.70%	2.00%	16.01%	18.33%
Palm Coast--Daytona Beach--Port Orange	24.93%	24.40%	27.63%	-2.12%	13.25%	10.85%
Panama City	13.40%	14.91%	17.49%	11.31%	17.30%	30.56%
Pensacola	13.51%	14.43%	16.99%	6.87%	17.70%	25.79%
Port St. Lucie	24.39%	21.96%	25.21%	-9.95%	14.79%	3.36%
Sarasota--Bradenton	29.48%	29.20%	32.87%	-0.93%	12.55%	11.51%
Sebastian--Vero Beach South--Florida Ridge	33.55%	30.41%	33.80%	-9.37%	11.13%	0.72%
Sebring--Avon Park	n/a	32.70%	36.45%	n/a	11.48%	n/a
Spring Hill	33.77%	27.07%	30.68%	-19.83%	13.32%	-9.15%
St. Augustine	19.70%	20.66%	24.10%	4.87%	16.64%	22.32%
Tallahassee	8.37%	9.08%	10.90%	8.49%	20.05%	30.23%
Tampa--St. Petersburg	18.02%	16.27%	18.68%	-9.71%	14.86%	3.71%
Titusville	20.45%	20.69%	23.82%	1.18%	15.15%	16.51%
Winter Haven	21.35%	20.43%	23.88%	-4.33%	16.91%	11.85%
Zephyrhills	34.11%	31.07%	34.21%	-8.93%	10.11%	0.29%
Florida Urbanized Area Total	17.60%	17.45%	20.13%	-0.83%	15.36%	14.39%

Source: U.S. Census and ERSI

Table D8: Florida UZA Statistics – 2000 and 2010

Florida Urbanized Area	Zero-Car Households			Public Transportation for Work		
	Number		% Change 2000-2010	Percent		% Change 2000-2010
	2000	2010		2000	2010	
Bonita Springs	3,265	4,472	36.97%	0.21%	1.03%	397.20%
Cape Coral	7,510	9,447	25.79%	0.87%	1.08%	23.62%
Deltona	2,616	2,811	7.45%	0.39%	0.62%	58.43%
Fort Walton Beach--Navarre--Wright	1,352	1,852	36.98%	0.15%	0.37%	144.32%
Gainesville	4,691	5,824	24.15%	3.43%	4.84%	41.25%
Homosassa Springs--Beverly Hills--Citrus Springs	n/a	901	n/a	n/a	0.21%	n/a
Jacksonville	24,804	25,990	4.78%	1.82%	1.42%	-21.75%
Kissimmee	2,581	4,973	92.68%	1.28%	1.55%	21.22%
Lady Lake--The Villages	441	1,781	303.85%	0.10%	0.32%	219.45%
Lakeland	5,001	5,540	10.78%	0.93%	0.64%	-31.69%
Leesburg--Eustis--Tavares	1,572	1,473	-6.30%	0.29%	0.16%	-42.83%
Miami	192,054	164,464	-14.37%	3.26%	3.74%	15.00%
North Port--Port Charlotte	2,519	3,018	19.81%	0.15%	0.22%	49.89%
Ocala	2,822	3,096	9.71%	0.24%	0.29%	18.61%
Orlando	28,132	27,509	-2.21%	2.06%	2.15%	4.49%
Palm Bay--Melbourne	5,816	7,391	27.08%	0.22%	0.45%	100.17%
Palm Coast--Daytona Beach--Port Orange	5,933	7,233	21.91%	1.35%	1.17%	-13.05%
Panama City	2,505	2,347	-6.31%	0.25%	0.70%	184.95%
Pensacola	7,938	7,911	-0.34%	1.29%	0.79%	-38.92%
Port St. Lucie	5,034	6,024	19.67%	0.85%	0.36%	-57.52%
Sarasota--Bradenton	12,570	13,808	9.85%	0.60%	0.99%	65.07%
Sebastian--Vero Beach South--Florida Ridge	2,172	2,612	20.26%	0.09%	0.28%	206.34%
Sebring--Avon Park	n/a	781	n/a	n/a	0.62%	n/a
Spring Hill	2,029	2,484	22.42%	0.06%	0.22%	274.30%
St. Augustine	791	1,236	56.26%	0.12%	0.16%	32.47%
Tallahassee	5,978	6,112	2.24%	2.08%	1.77%	-15.05%
Tampa--St. Petersburg	63,683	63,684	0.00%	1.44%	1.58%	9.69%
Titusville	1,002	842	-15.97%	0.12%	0.04%	-68.02%
Winter Haven	4,217	4,100	-2.77%	0.81%	0.59%	-27.16%
Zephyrhills	1,293	1,522	17.71%	0.07%	0.57%	677.33%
Florida Urbanized Area Total	400,321	391,238	-2.27%	n/a	n/a	n/a

Source: U.S. Census