

2018

Commuting Trends in Florida

A Special Report from FDOT Forecasting and Trends Office

COMMUTING TRENDS SUMMARY



BASED ON 2018 AMERICAN COMMUNITY SURVEY

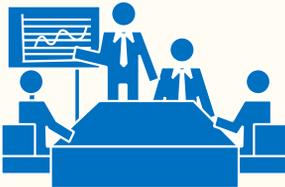


INCREASED AUTO AVAILABILITY

Florida's zero-vehicle households decreased to 6.2% in 2018, down from 6.3% in 2017 and from the peak of 7.4% in 2012. This compares with a national level of 8.5% in 2018.

INCREASE IN OVERALL COMMUTE TIMES

The average one-way commute in Florida continued to grow from 27.8 minutes in 2017 to 28.0 minutes in 2018. The same trend is observed nationally as the average commute time grew from 26.9 minutes to 27.1 minutes. The Florida and national commute times have increased 10.2% and 8.0%, respectively, in the past decade. In Florida, 18.3% of commuters made commute trips 45 minutes or longer.



MOBILE WORK FORCE

In 2018, 19.0% of Florida commuters worked outside their county or the state, compared to 19.2% in 2017. Nationally, 27.8% of commuters worked outside their county or state of residence, a slight increase of 0.1% from 2017.

DECREASE IN NO-WORKER HOUSEHOLDS

In 2018, the share of households with zero workers was 31.6% in Florida, a slight decrease of 0.3% from 2017. The share remained unchanged at 26.5% nationally.



WORK-AT-HOME CONTINUED TO INCREASE

The work-at-home population had a slight increase both in Florida and nationally. In 2018, 6.2% of workers in Florida worked from home, up by 0.1% from 2017. In the US, 5.3% workers worked at home, also up by 0.1% from 2017.

2018 FLORIDA

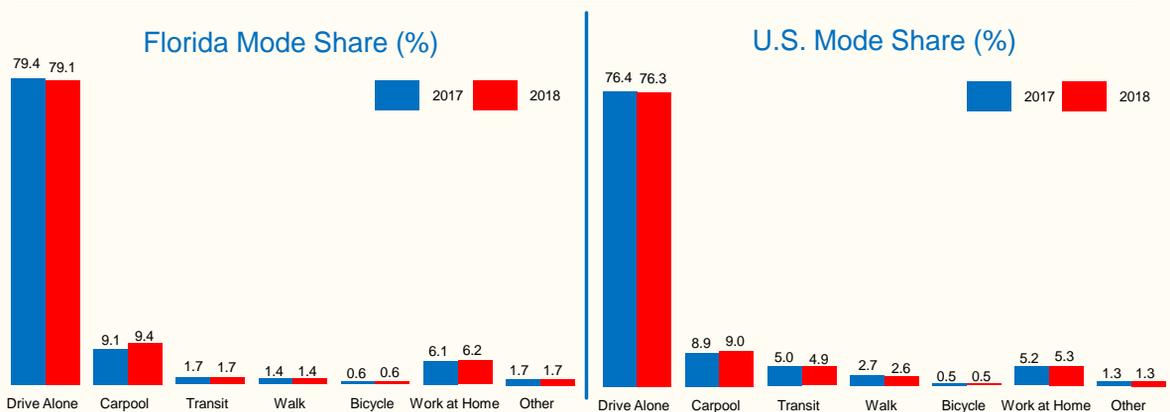
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CHANGES IN COMMUTING MODE SHARES



Continued dominance by driving alone – In Florida, 79.1% of commuters drove alone, slightly lower than 2017 and 2.8% above the national average. The number of commuters driving alone in Florida grew by 176,537 in 2018.



Slightly more carpooling – Carpooling remains the second most common means of commuting. Its share increased from 9.1% in 2017 to 9.4% in 2018 for Florida. The share for the U.S. increased from 8.9% in 2017 to 9.0% in 2018.



Stagnant commuting by transit – From 2017 to 2018, transit use for commuting remained unchanged at 1.7% in Florida. Nationally, transit use saw a slight decline by 0.1% to 4.9%.



No significant change in commuting by walking – Commuting by walking remained unchanged at 1.4% in Florida from 2017 to 2018 but fell slightly by 0.1% to 2.6% nationally.



No significant change in commuting by bicycling – From 2017 to 2018, the bicycle commuting share remained unchanged both in Florida at 0.6% and in the U.S. at 0.5%.

Detailed Commuting Trends

While commuting constitutes only a portion of overall travel demand, commute traffic determines peak period travel demand which often governs the planning and design of transportation systems. Travel demand is complex and influenced by multiple continuously evolving factors. Understanding the travel demand trends and the underlying influencing factors could lead to a better understanding of future travel needs, more accurate travel demand forecasting, and more effective decision making at the state and local levels.

Ten-Year Commuting Trends in Florida and the United States

Table 1 shows the commuting trends for Florida and U.S. since 2009. For information on data collection, sampling design, non-sampling error, definitions, and the concept of Margin of Errors (MOE) related to the data, see <https://www.census.gov/programs-surveys/acs/methodology.html>.

TABLE 1 - FLORIDA AND U.S. ACS TRENDS

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
VEHICLES AVAILABLE – FLORIDA										
No vehicles available	6.6%	7.0%	7.3%	7.4%	7.2%	6.9%	6.8%	6.6%	6.3%	6.2%
1 vehicle available	41.2%	41.1%	41.7%	42.2%	41.6%	41.2%	41.0%	40.4%	39.7%	39.5%
2 vehicles available	38.3%	37.9%	37.8%	37.4%	37.7%	38.2%	38.0%	38.1%	38.5%	38.1%
3 or more vehicles available	14.0%	13.7%	13.1%	13.0%	13.5%	13.7%	14.2%	14.9%	15.5%	16.2%
VEHICLES AVAILABLE – U.S.										
No vehicles available	8.9%	9.1%	9.3%	9.2%	9.1%	9.1%	8.9%	8.7%	8.6%	8.5%
1 vehicle available	33.7%	33.8%	34.1%	34.1%	33.9%	33.7%	33.5%	33.2%	32.7%	32.5%
2 vehicles available	37.6%	37.6%	37.5%	37.3%	37.3%	37.3%	37.2%	37.1%	37.3%	37.1%
3 or more vehicles available	19.9%	19.5%	19.1%	19.3%	19.7%	19.9%	20.3%	21.0%	21.5%	21.9%
COMMUTING TO WORK – FLORIDA										
Car, truck, or van – drove alone	79.3%	79.9%	79.7%	79.3%	79.6%	79.7%	79.7%	79.2%	79.4%	79.1%
Car, truck, or van – carpooled	10.4%	9.6%	9.9%	9.7%	9.4%	9.1%	8.9%	9.2%	9.1%	9.4%
Public transportation (not taxi)	1.9%	2.1%	2.1%	2.2%	2.1%	2.1%	2.2%	2.1%	1.7%	1.7%
Walked	1.5%	1.7%	1.5%	1.6%	1.5%	1.4%	1.4%	1.5%	1.4%	1.4%
Bicycle	0.7%	0.6%	0.6%	0.7%	0.7%	0.7%	0.7%	0.6%	0.6%	0.6%
Other means	1.6%	1.5%	1.6%	1.6%	1.5%	1.5%	1.5%	1.5%	1.7%	1.7%
Worked at home	4.8%	4.6%	4.6%	5.0%	5.1%	5.4%	5.6%	6.0%	6.1%	6.2%
COMMUTING TO WORK – U.S.										
Car, truck, or van -- drove alone	76.1%	76.6%	76.4%	76.3%	76.4%	76.5%	76.6%	76.3%	76.4%	76.3%
Car, truck, or van -- carpooled	10.0%	9.7%	9.7%	9.7%	9.4%	9.2%	9.0%	9.0%	8.9%	9.0%
Public transportation (not taxi)	5.0%	4.9%	5.0%	5.0%	5.2%	5.2%	5.2%	5.1%	5.0%	4.9%
Walked	2.9%	2.8%	2.8%	2.8%	2.8%	2.7%	2.8%	2.7%	2.7%	2.6%
Bicycle	0.6%	0.5%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.5%	0.5%
Other means	1.2%	1.2%	1.2%	1.2%	1.3%	1.2%	1.2%	1.2%	1.3%	1.3%
Worked at home	4.3%	4.3%	4.3%	4.4%	4.4%	4.5%	4.6%	5.0%	5.2%	5.3%
ZERO-WORKER HOUSEHOLDS										
Florida	31.6%	32.5%	32.9%	33.0%	32.7%	32.1%	32.2%	32.0%	31.9%	31.6%
U.S.	26.3%	27.2%	27.5%	27.3%	27.0%	26.9%	26.8%	26.6%	26.5%	26.5%
MEAN TRAVEL TIME TO WORK										
Florida (mins)	25.4	25.5	25.8	26.2	26.1	26.4	27.0	27.4	27.8	28.0
U.S. (mins)	25.1	25.3	25.5	25.7	25.8	26.0	26.4	26.6	26.9	27.1

The work-at-home population has grown in the past decade across the nation and particularly in Florida (**Figure 1**). This was among the fastest-changing aspects of commuting. Work-at-home has a profound impact on the commuting share of overall travel demand. Work-at-home is just one of the numerous ways that communication is being substituted for travel. In 2018, the work-at-home share of the population reached an all-time high of 6.2% in Florida and 5.3% in the nation.

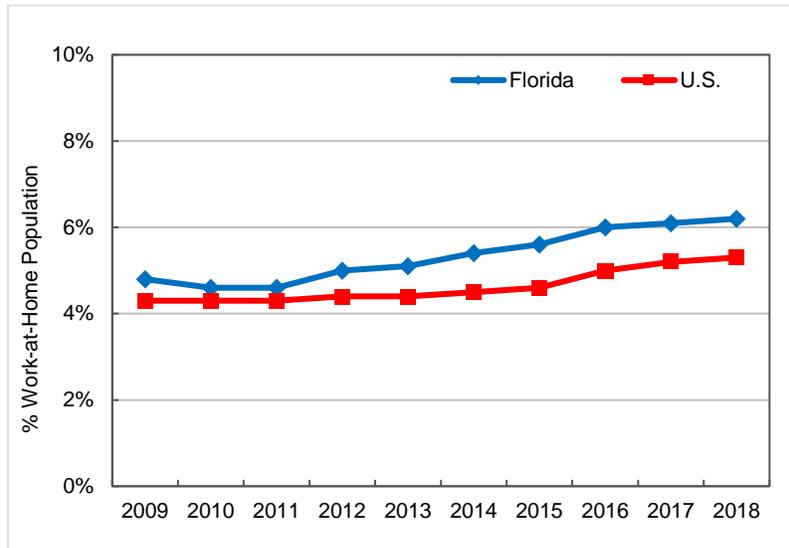


FIGURE 1 - WORK-AT-HOME POPULATION SHARE, FLORIDA VS U.S.

Florida has a higher share of households with no workers in large part due to its concentration of retirees. The share of households that have no workers (**Figure 2**) has decreased slightly to 31.6% in Florida and but remains at 26.5% in the U.S in 2018. This is relevant to transportation policy in that the residential location preferences and travel decisions of these households are not necessarily influenced by access to work considerations. Combined with work-at-home households, approximately 37.8% of households in Florida are not involved in regular commuting.

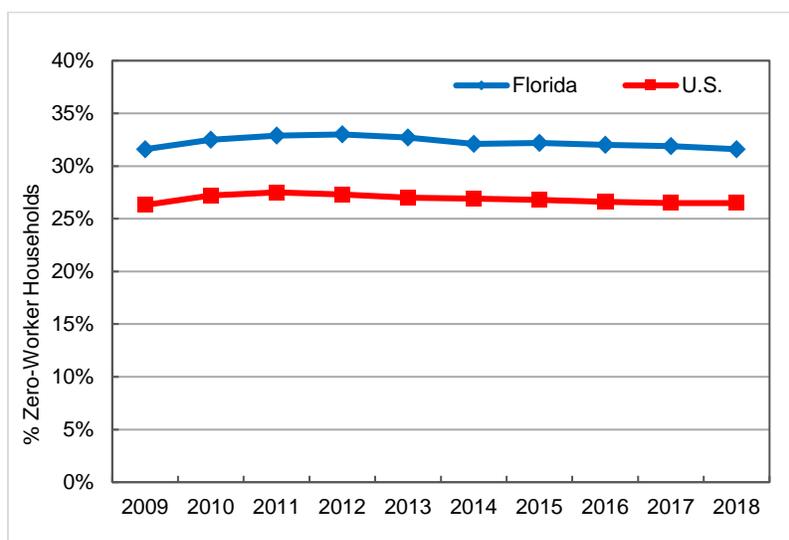


FIGURE 2 – HOUSEHOLDS WITH NO-WORKERS

Figure 3 contrasts Florida and U.S. zero-car household trends. From 2009 to 2012, the share of zero-car households grew, but it has been decreasing since 2013 in Florida. A similar trend was observed nationally. However, the national drop started in 2012. From 2017 to 2018, the share of zero-car households decreased from 6.3% to 6.2% in Florida, and from 8.6% to 8.5% nationally. As zero-car households are typically small, often with only single persons, the share of the population residing in zero-car households is also small. The share was 4.2% in Florida and 5.7% in the U.S. in 2017. The information for 2018 is not available but is expected to be similar to 2017.

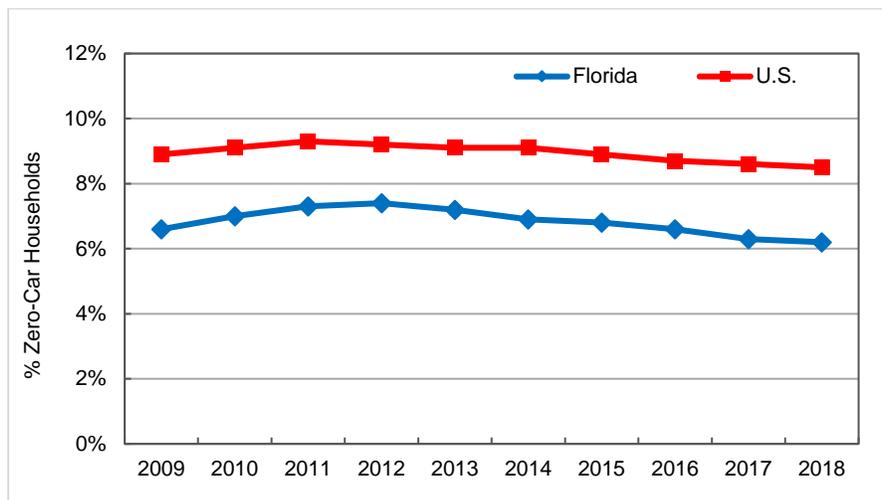


FIGURE 3 - ZERO-CAR HOUSEHOLDS

Figure 4 contrasts Florida and national trends with respect to carpool and transit use. Reliance on driving or being a private-vehicle passenger remained the dominant means of commuting in Florida, with “drove alone” being 2.8% higher than in the rest of the country (**Table 1**). Commuting by carpool in Florida was slightly higher than the national average while commuting by transit in Florida was lower than the national average. Between 2017 and 2018, transit use remained steady at 1.7% in Florida but decreased by 0.1% nationally. Carpooling saw a slight increase of 0.3% in Florida compared to 0.1% in the rest of the country.

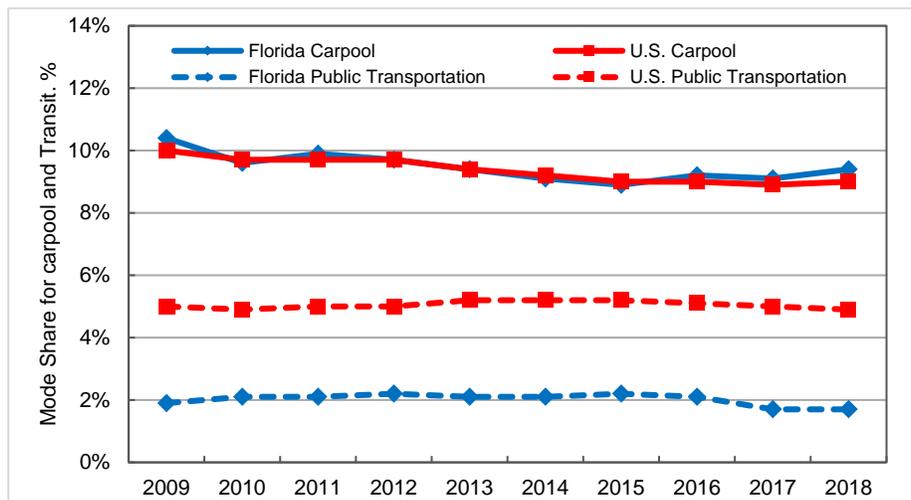


FIGURE 4 - TRANSIT AND CARPOOL COMMUTING

Florida and national shares of walk and bike commuting exhibited slight fluctuations over the past decade (**Figure 5**). While Florida consistently had a smaller share of walking commuters than the national average, Florida’s share of bicycle commuters remained equal to or marginally greater than the national share. In 2018, the share of bicycle commuters remained unchanged both in Florida (0.6%) and in the U.S. (0.5%).

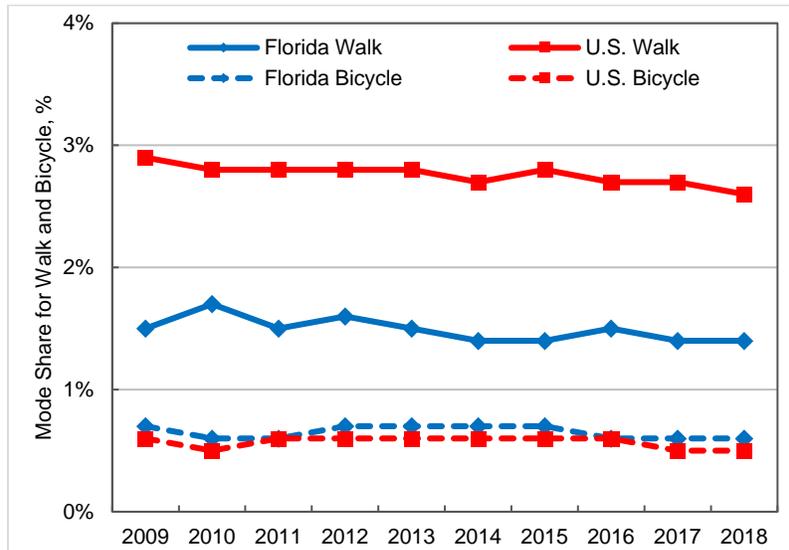


FIGURE 5 - WALK AND BICYCLE COMMUTING

Mean commute times continued to increase for both Florida and the U.S. (**Figure 6**), with Florida’s average commute time being 0.9 minute longer than the national average in 2018. Florida’s average commute time increased from 27.8 minutes in 2017 to 28.0 minutes in 2018. The national average reached to an all-time high of 27.1 minutes in 2018.

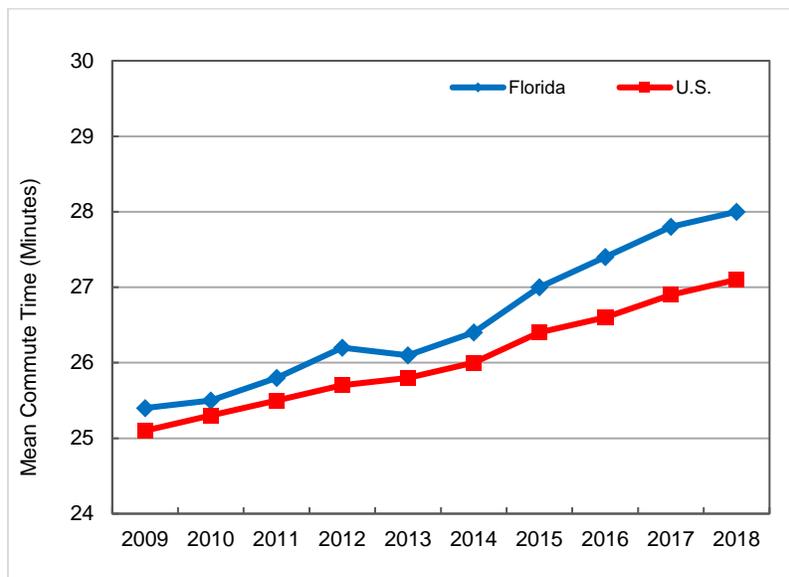


FIGURE 6 - MEAN COMMUTE TIMES

Year 2018 Commuting Characteristics in Florida

Table 2 shows the comparative transit mode shares for commuting for the Metropolitan Statistical Areas (MSAs) in Florida. Transit use in all Florida MSAs is below the national average. The transit commuting shares in three (3) of the Florida MSAs, Miami-Fort Lauderdale-West Palm Beach, Gainesville, and Tallahassee, was higher than the state average. All but six (6) of the 22 MSAs in Florida had transit commute shares less than 1%.

TABLE 2 - TOP FLORIDA MSAs RANKED BY TRANSIT MODE SHARE TO WORK, 2018

Rank	Metropolitan Statistical Area (MSA)	Transit, %
1	Miami-Fort Lauderdale-West Palm Beach	3.1%
2	Gainesville	2.7%
3	Tallahassee	2.0%
4	Sebring	1.4%
5	Orlando-Kissimmee-Sanford	1.3%
5	Tampa-St. Petersburg-Clearwater	1.3%
7	Jacksonville	0.9%
8	Crestview-Fort Walton Beach-Destin	0.7%
8	Naples-Immokalee-Marco Island	0.7%
8	Palm Bay-Melbourne-Titusville	0.7%
11	Deltona-Daytona Beach-Ormond Beach	0.6%
11	Panama City	0.6%
11	Pensacola-Ferry Pass-Brent	0.6%
11	Punta Gorda	0.6%
15	North Port-Sarasota-Bradenton	0.5%
16	Cape Coral-Fort Myers	0.4%
16	Ocala	0.4%
16	Port St. Lucie	0.4%
19	Lakeland-Winter Haven	0.3%
20	Sebastian-Vero Beach	0.1%
20	The Villages	0.1%
*	Homosassa Springs	N*
	Florida	1.7%
	United States	4.9%

* Data cannot be displayed because the number of sample cases is too small.

Table 3 provides transit commute share data at the county level. Based on data reported in 2018 National Transit Database, there were 32 transit agencies providing public transportation services covering 32 counties. The FDOT Rural Integrated National Transit Database (Rural iNTD) reported additional 24 counties where public transportation is provided by rural providers. The transit mode share data is only available for 34 counties in Florida from the 2018 American Community Survey data. Of the 34 counties, six (6) had a transit commute share equal to or greater than the state average. Miami-Dade County had the highest transit share of 4.6% in Florida, but it still fell below the national average of 4.9%. In addition to Miami-Dade, Alachua and Leon counties had the highest transit commute shares, while Indian River, Sumter, St. Johns, Lake, and Clay counties had the lowest transit commute shares in 2018.

TABLE 3 - FLORIDA COUNTIES RANKED BY TRANSIT MODE SHARE TO WORK, 2018

Rank	County	Transit %	Rank	County	Transit %
1	Miami-Dade County	4.6%	14	Brevard County	0.7%
2	Alachua County	2.9%	21	Pasco County	0.6%
3	Leon County	2.4%	21	Monroe County	0.6%
3	Broward County	2.4%	21	Charlotte County	0.6%
5	Osceola County	1.9%	24	Marion County	0.4%
6	Orange County	1.7%	24	Manatee County	0.4%
7	Pinellas County	1.6%	24	St. Lucie County	0.4%
8	Palm Beach County	1.4%	24	Lee County	0.4%
8	Duval County	1.4%	28	Martin County	0.3%
8	Highlands County	1.4%	28	Polk County	0.3%
8	Hillsborough County	1.4%	30	Indian River County	0.1%
12	Escambia County	0.9%	30	Sumter County	0.1%
13	Okaloosa County	0.8%	30	St. Johns County	0.1%
14	Seminole County	0.7%	30	Lake County	0.1%
14	Bay County	0.7%	30	Clay County	0.1%
14	Hernando County	0.7%			
14	Sarasota County	0.7%			
14	Collier County	0.7%		Florida	1.7%
14	Volusia County	0.7%		United States	4.9%

Table 4 presents average commute times for 41 Florida counties where data is available for 2018. Of the 41 counties, fourteen had average commute times higher than the Florida average, and 17 had commute times higher than the national average. Osceola, Putnam, and Miami-Dade Counties had the highest average commute time in the state in 2018. Alachua, Leon, Highlands, and Monroe Counties had the lowest average commute time in Florida for approximately 22 minutes or less.

TABLE 4 - TOP FLORIDA COUNTIES RANKED BY TRAVEL TIME TO WORK, 2018

Rank	County	Minutes	Rank	County	Minutes
1	Osceola County	35.1	23	Sumter County	26.0
2	Putnam County	33.7	23	Volusia County	26.0
2	Miami-Dade County	33.7	25	Manatee County	25.6
4	Pasco County	32.3	26	Duval County	25.5
5	Clay County	32.3	27	Brevard County	25.4
6	Lake County	31.1	28	Columbia County	24.5
7	Santa Rosa County	30.3	28	Charlotte County	24.5
8	Nassau County	29.7	30	Sarasota County	24.3
9	Hernando County	29.4	31	Okaloosa County	24.2
10	Polk County	29.1	31	Collier County	24.2
11	Broward County	28.7	33	Pinellas County	23.9
12	St. Lucie County	28.5	34	Escambia County	23.8
13	Hillsborough County	28.4	34	Bay County	23.8
14	Lee County	28.1	36	Martin County	22.4
15	Orange County	27.9	37	Indian River County	22.1
16	Flagler County	27.7	38	Alachua County	21.8
17	Citrus County	27.6	39	Leon County	21.3
18	Marion County	27.0	40	Highlands County	20.8
19	Seminole County	26.6	41	Monroe County	17.8
20	Palm Beach County	26.5			
20	St. Johns County	26.5		Florida	28.0
22	Walton County	26.2		United States	27.1

Figure 7 shows the distribution of one-way commute travel time in Florida by mode. About 56.5% of commuters who drove alone to work had commute times less than 30 minutes in 2018. Carpooling average commute times were slightly shorter than drive-alone commute times with 55.5% of carpool commutes less than 30 minutes. Transit trips are noticeably longer due to a combination of wait time, the vehicle stopping for other passengers, and transfers. Because of the transit commute characteristics, 74.3% of transit commutes took longer than 30 minutes.

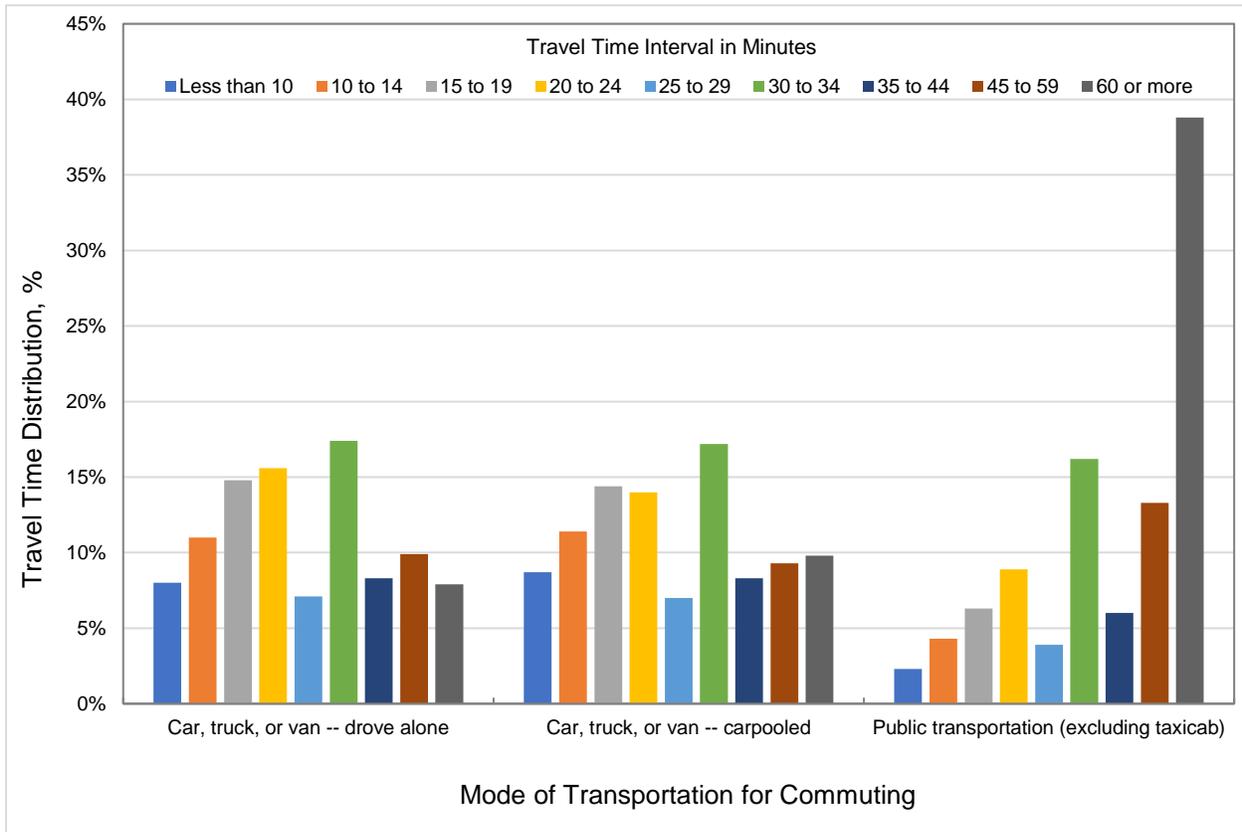


FIGURE 7 – COMMUTE TIME BY MODE

Comparison of Commuting Characteristics between Florida and Other States

Table 5 provides ranked data on cross-county commuting for the U.S in 2018. Thirty-nine states had more cross-county commuting than Florida in 2018. Virginia and New Jersey had the highest shares of cross-county commuting, at over 51% and 47%, respectively. Not surprisingly, the lowest share of cross-county commuting occurred in Hawaii at less than 1.0%. Florida's share of cross-county commuters was 19% in 2018, while the national average was close to 28%.

TABLE 5 - PERCENT WORKERS WHO WORKED OUTSIDE COUNTY OR STATE OF RESIDENCE, 2018

Rank	State	Percent	Rank	State	Percent
1	Virginia	51.3%	27	Oklahoma	26.2%
2	New Jersey	47.2%	28	Iowa	25.3%
3	Maryland	46.0%	28	District of Columbia	25.3%
4	Georgia	42.4%	30	Kansas	25.1%
5	Rhode Island	38.1%	31	Arkansas	25.0%
6	Mississippi	36.9%	32	Texas	23.3%
7	Minnesota	36.0%	32	Vermont	23.3%
7	New York	36.0%	34	Delaware	23.0%
9	Missouri	35.8%	35	Oregon	22.5%
10	Massachusetts	35.1%	36	Maine	22.3%
11	New Hampshire	34.9%	37	Nebraska	21.2%
12	Colorado	34.1%	38	Idaho	20.8%
13	West Virginia	33.8%	39	South Dakota	20.5%
14	Indiana	32.8%	40	Florida	19.0%
15	Kentucky	32.2%	41	Washington	18.6%
16	Louisiana	31.2%	41	Utah	18.6%
17	Michigan	31.1%	43	California	17.6%
18	Ohio	30.5%	44	New Mexico	16.4%
19	South Carolina	30.0%	45	North Dakota	15.4%
20	Pennsylvania	29.7%	46	Montana	9.0%
21	North Carolina	29.2%	47	Wyoming	6.9%
22	Tennessee	28.8%	48	Alaska	6.7%
23	Wisconsin	28.5%	49	Arizona	5.9%
24	Alabama	27.6%	50	Nevada	5.6%
25	Connecticut	27.5%	51	Hawaii	1.0%
26	Illinois	27.2%		United States	27.8%

Figure 8 provides comparisons across states in Single Occupancy Vehicle (SOV) shares. The SOV share in Florida was 79.1% in 2018, which was lower than that of 28 other states but still higher than the national average of 76.3%.

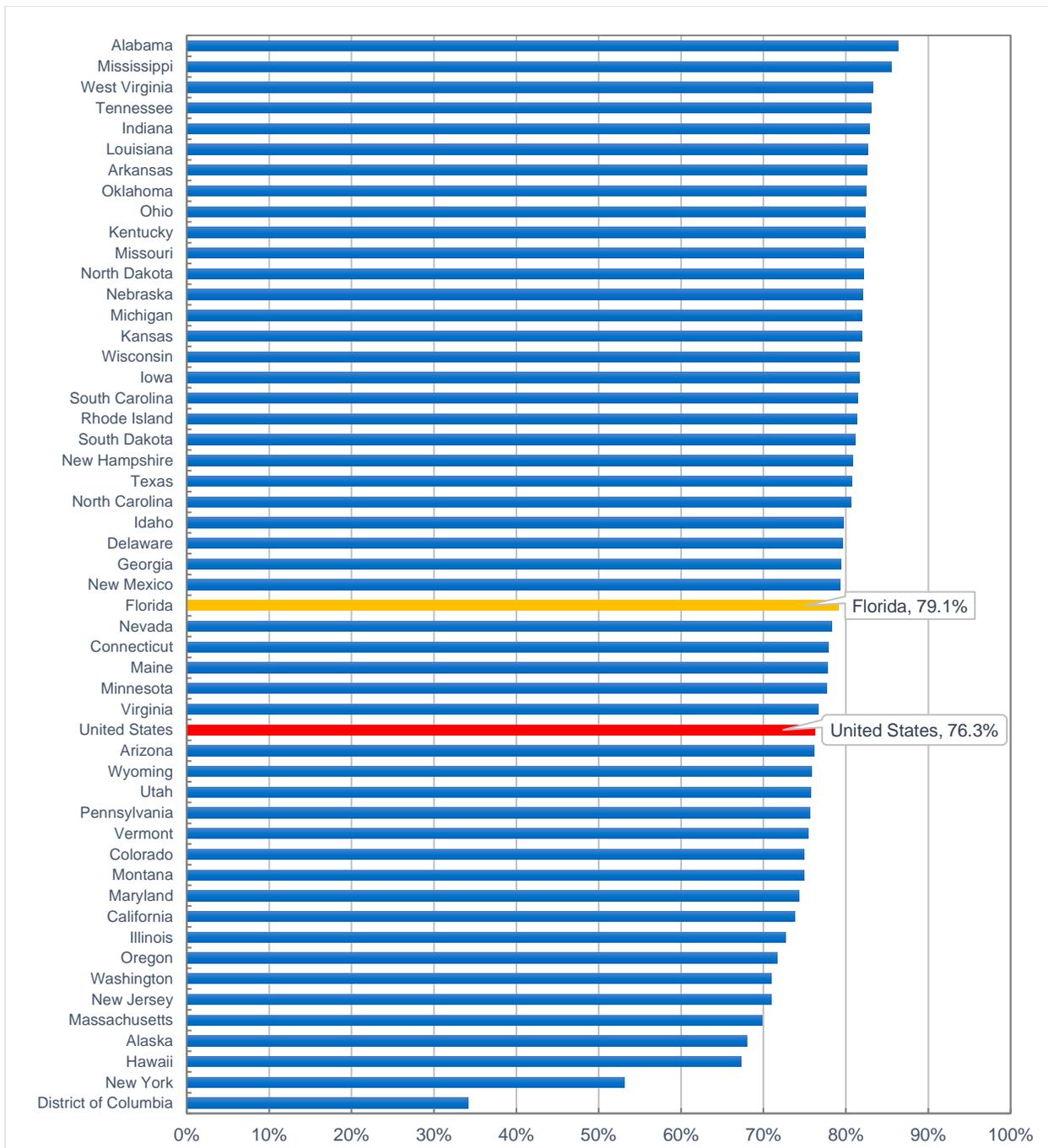


FIGURE 8 - PERCENT SOV FOR ALL STATES AND THE U.S., 2018

Figure 9 presents a comparison of average commute times by all modes across the nation in 2018. With an average commute time of 28 minutes, Florida was among the states that had the longest travel times to work. Nine (9) states and the District of Columbia had longer commute times than Florida. The national average commute time was slightly shorter than the Florida average at 27.1 minutes.

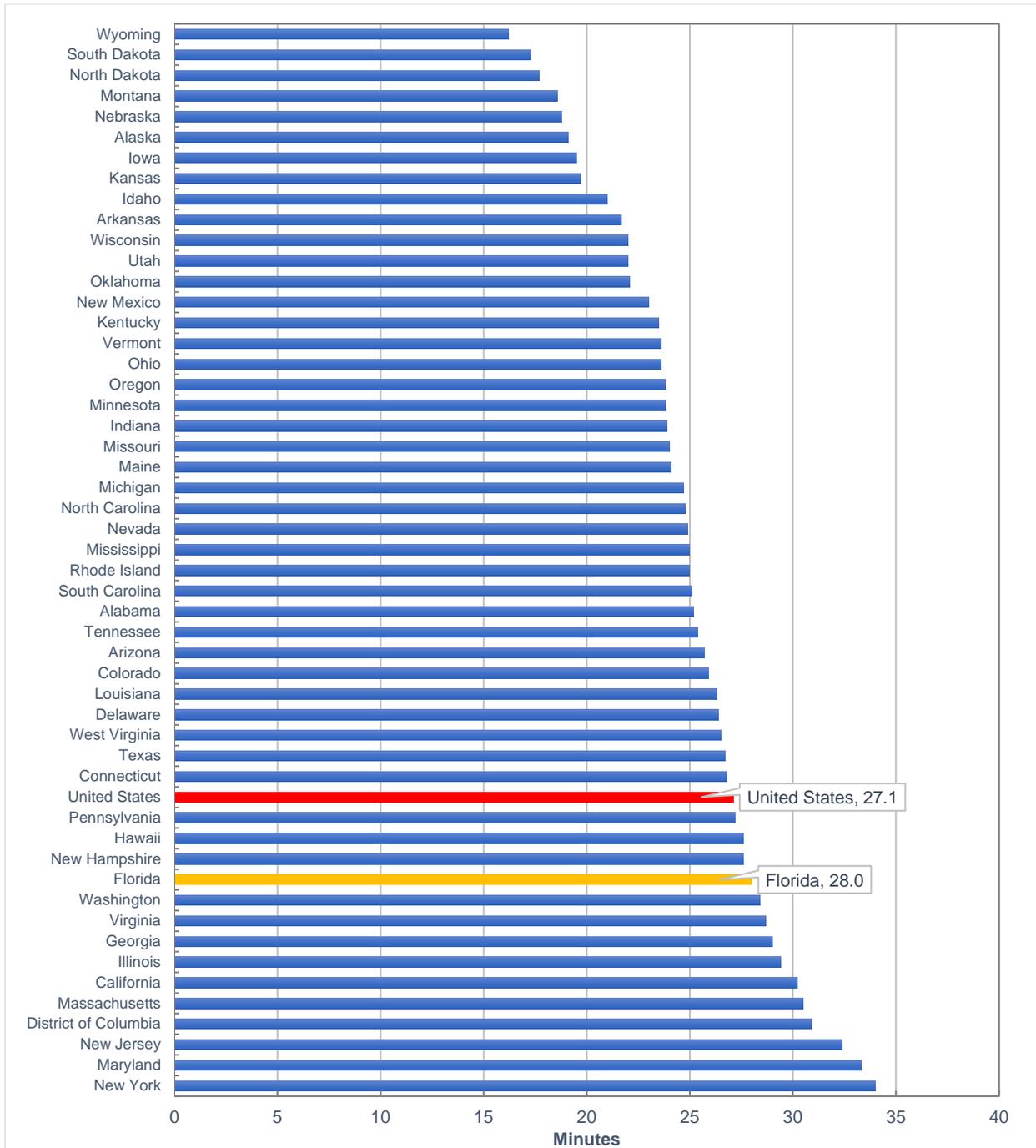


FIGURE 9 - AVERAGE COMMUTE TIME BY ALL MODES FOR ALL STATES AND THE U.S., 2018

Although fundamental travel behaviors remain intact, the most notable changes in the data for recent years reflect the influence of the economy on several measures. The tables and figures in the report provide detailed information to support the findings. Due to relatively small sample sizes (approximately 1.45% of the Florida households), many of the small differences over time and between locations may not be statistically significant.