



2019 Commuting Trends in Florida

A Special Report from FDOT Forecasting and Trends Office

2019 FLORIDA

COMMUTING TRENDS SUMMARY



BASED ON 2019 AMERICAN COMMUNITY SURVEY

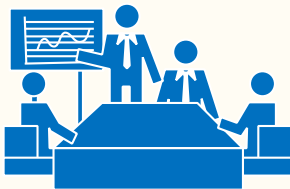
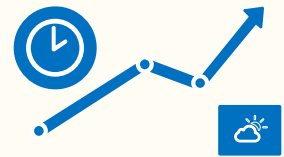


INCREASED AUTO AVAILABILITY

Florida's zero-vehicle households decreased to 6.1% in 2019, down from 6.2% in 2018 and from the peak of 7.4% in 2012. This compares with a national level of 8.6% in 2019.

INCREASE IN OVERALL COMMUTE TIMES

The average one-way commute in Florida continued to grow from 28.0 minutes in 2018 to 28.4 minutes in 2019. The same trend is observed nationally as the average commute time grew from 27.1 minutes to 27.6 minutes. The Florida and national commute times have increased 11.4% and 9.1%, respectively, in the past decade. In Florida, 18.7% of commuters made commute trips of 45 minutes or longer.



MOBILE WORK FORCE

In 2019, 19.7% of Florida commuters worked outside their county or the state, compared to 19.0% in 2018. Nationally, 27.9% of commuters worked outside their county or state of residence, a slight increase of 0.1% from 2018.

DECREASE IN NO-WORKER HOUSEHOLDS

In 2019, the share of households with zero workers decreased from 31.6% in 2018 to 31.0% in Florida. Nationally, the share of households with zero workers fell from 26.5% to 26.3% during the same period.



WORK-AT-HOME CONTINUED TO INCREASE

The work-at-home population continued to increase both in Florida and nationally. In 2019, 7.0% of workers in Florida worked from home, up by 0.8% from 2018. In the US, 5.7% workers worked at home, up by 0.4% from 2018.

2019 FLORIDA

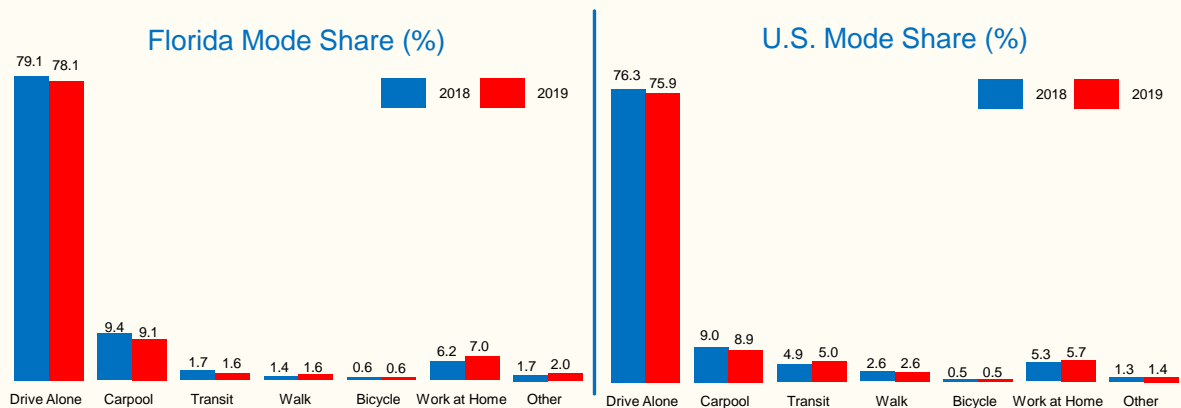
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CHANGES IN COMMUTING MODE SHARES



Continued dominance by driving alone – In Florida, 78.1% of commuters drove alone, slightly lower than 2018 and 2.2% above the national average. The number of commuters driving alone in Florida grew by 106,512 in 2019.



Slightly less carpooling – Carpooling remains the second most common means of commuting. Its share decreased from 9.4% in 2018 to 9.1% in 2019 for Florida. The share for the U.S. also decreased from 9.0% in 2018 to 8.9% in 2019.



No significant change in commuting by transit – From 2018 to 2019, transit use for commuting decreased by 0.1% to 1.6% in Florida. Nationally, transit use saw a slight increase by 0.1% to reach 5.0%.



No significant change in commuting by walking – Commuting by walking rose by 0.2% to reach 1.6% in Florida from 2018 to 2019. The share remained the same at 2.6% nationally.



No change in commuting by bicycling – From 2018 to 2019, 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 2010. 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

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
VEHICLES AVAILABLE – FLORIDA										
No vehicles available	7.0%	7.3%	7.4%	7.2%	6.9%	6.8%	6.6%	6.3%	6.2%	6.1%
1 vehicle available	41.1%	41.7%	42.2%	41.6%	41.2%	41.0%	40.4%	39.7%	39.5%	38.9%
2 vehicles available	37.9%	37.8%	37.4%	37.7%	38.2%	38.0%	38.1%	38.5%	38.1%	38.2%
3 or more vehicles available	13.7%	13.1%	13.0%	13.5%	13.7%	14.2%	14.9%	15.5%	16.2%	16.8%
VEHICLES AVAILABLE – U.S.										
No vehicles available	9.1%	9.3%	9.2%	9.1%	9.1%	8.9%	8.7%	8.6%	8.5%	8.6%
1 vehicle available	33.8%	34.1%	34.1%	33.9%	33.7%	33.5%	33.2%	32.7%	32.5%	32.4%
2 vehicles available	37.6%	37.5%	37.3%	37.3%	37.3%	37.2%	37.1%	37.3%	37.1%	36.9%
3 or more vehicles available	19.5%	19.1%	19.3%	19.7%	19.9%	20.3%	21.0%	21.5%	21.9%	22.1%
COMMUTING TO WORK – FLORIDA										
Car, truck, or van – drove alone	79.9%	79.7%	79.3%	79.6%	79.7%	79.7%	79.2%	79.4%	79.1%	78.1%
Car, truck, or van – carpooled	9.6%	9.9%	9.7%	9.4%	9.1%	8.9%	9.2%	9.1%	9.4%	9.1%
Public transportation (not taxi)	2.1%	2.1%	2.2%	2.1%	2.1%	2.2%	2.1%	1.7%	1.7%	1.6%
Walked	1.7%	1.5%	1.6%	1.5%	1.4%	1.4%	1.5%	1.4%	1.4%	1.6%
Bicycle	0.6%	0.6%	0.7%	0.7%	0.7%	0.7%	0.6%	0.6%	0.6%	0.6%
Other means	1.5%	1.6%	1.6%	1.5%	1.5%	1.5%	1.5%	1.7%	1.7%	2.0%
Worked at home	4.6%	4.6%	5.0%	5.1%	5.4%	5.6%	6.0%	6.1%	6.2%	7.0%
COMMUTING TO WORK – U.S.										
Car, truck, or van -- drove alone	76.6%	76.4%	76.3%	76.4%	76.5%	76.6%	76.3%	76.4%	76.3%	75.9%
Car, truck, or van -- carpooled	9.7%	9.7%	9.7%	9.4%	9.2%	9.0%	9.0%	8.9%	9.0%	8.9%
Public transportation (not taxi)	4.9%	5.0%	5.0%	5.2%	5.2%	5.2%	5.1%	5.0%	4.9%	5.0%
Walked	2.8%	2.8%	2.8%	2.8%	2.7%	2.8%	2.7%	2.7%	2.6%	2.6%
Bicycle	0.5%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.5%	0.5%	0.5%
Other means	1.2%	1.2%	1.2%	1.3%	1.2%	1.2%	1.2%	1.3%	1.3%	1.4%
Worked at home	4.3%	4.3%	4.4%	4.4%	4.5%	4.6%	5.0%	5.2%	5.3%	5.7%
ZERO-WORKER HOUSEHOLDS										
Florida	32.5%	32.9%	33.0%	32.7%	32.1%	32.2%	32.0%	31.9%	31.6%	31.0%
U.S.	27.2%	27.5%	27.3%	27.0%	26.9%	26.8%	26.6%	26.5%	26.5%	26.3%
MEAN TRAVEL TIME TO WORK										
Florida (mins)	25.5	25.8	26.2	26.1	26.4	27.0	27.4	27.8	28.0	28.4
U.S. (mins)	25.3	25.5	25.7	25.8	26.0	26.4	26.6	26.9	27.1	27.6

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 2019, the work-at-home share of the population reached an all-time high of 7.0% in Florida and 5.7% in the nation.

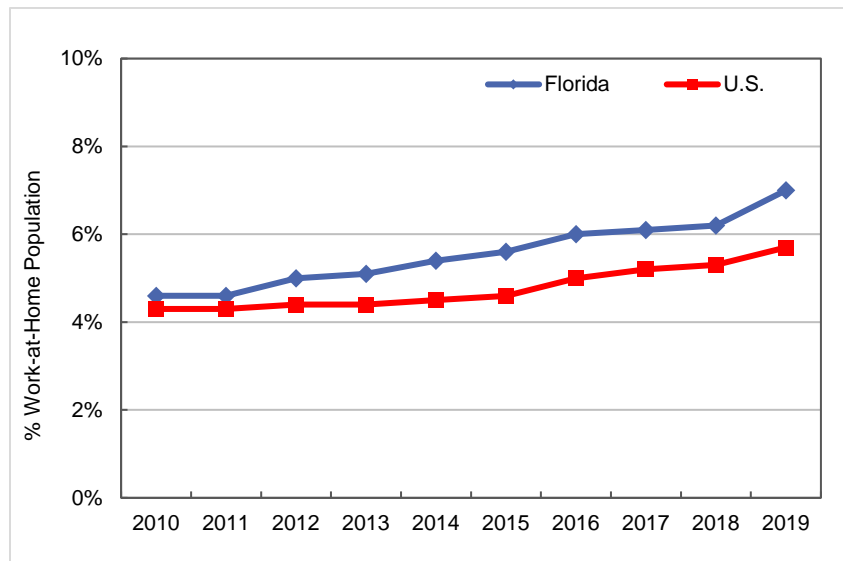


FIGURE 1 - WORK-AT-HOME POPULATION SHARE, FLORIDA VS U.S.

Florida has a higher share of households with no workers in large part due to its concentration of retirees. In Florida, the share of households with no workers continued to decline for the 4th consecutive year, falling to 31.6% in 2019 (**Figure 2**). Combined with work-at-home households, approximately 38.0% of households in Florida are not involved in regular commuting. The share of households with no workers in the U.S. was 26.3% in 2019.

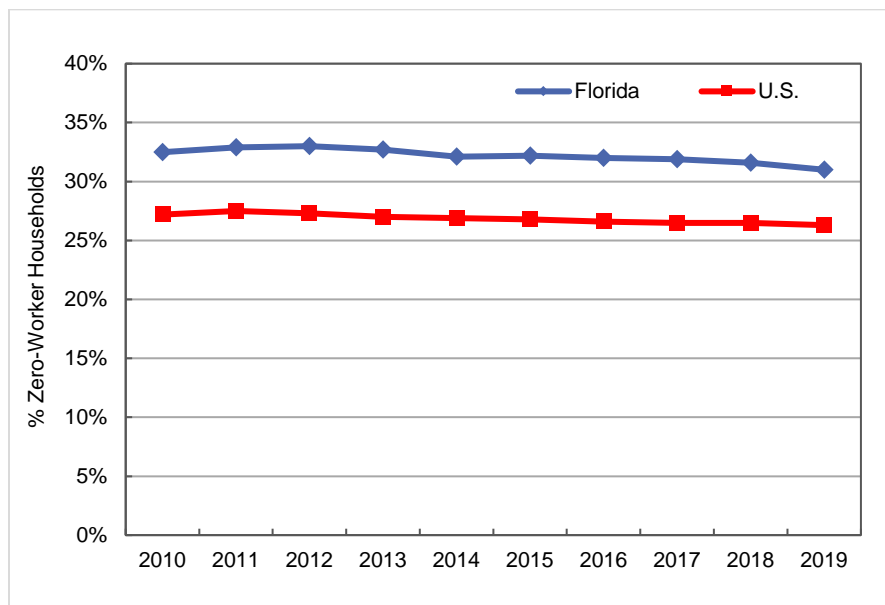


FIGURE 2 – HOUSEHOLDS WITH NO-WORKERS

Figure 3 contrasts Florida and U.S. zero-car household trends. From 2010 to 2012, the share of zero-car households grew, but it has been decreasing since 2013 in Florida. Nationally, the share of zero-car households increased from 2010 to 2011. It started to decrease in 2012 and the trend continued until 2018. Year 2019 saw a manicure increase from 8.5% to 8.6%. 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 3.9% in Florida and 5.9% in the U.S. in 2019.

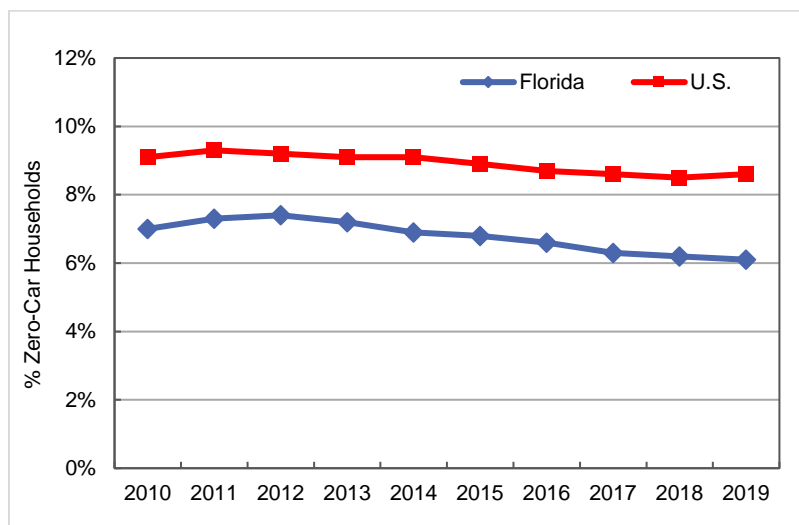


FIGURE 3 - ZERO-CAR HOUSEHOLDS

Figure 4 compares Florida and national trends with respect to carpool and transit use. Reliance on driving or riding in a passenger vehicle remained the dominant means of commuting in Florida, with “drove alone” being 2.2% 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 2018 and 2019, carpooling saw a decrease of 0.3% in Florida compared to a 0.1% decrease for the rest of the country. Transit use decreased by 0.1% to reach 1.6% in Florida but increased by 0.1% to reach 5.0% nationally.

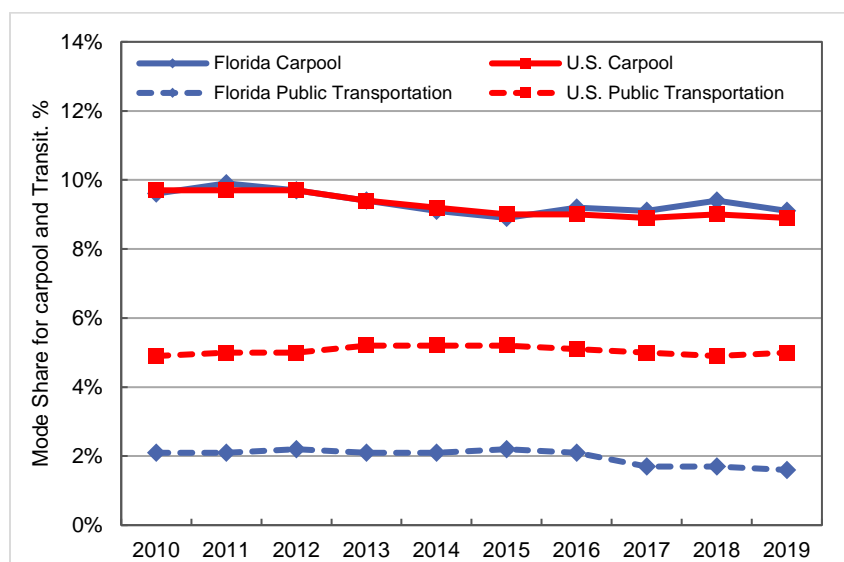


FIGURE 4 - TRANSIT AND CARPOOL COMMUTING

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 2019, the share of bicycle commuters remained unchanged both in Florida (0.6%) and in the U.S. (0.5%).

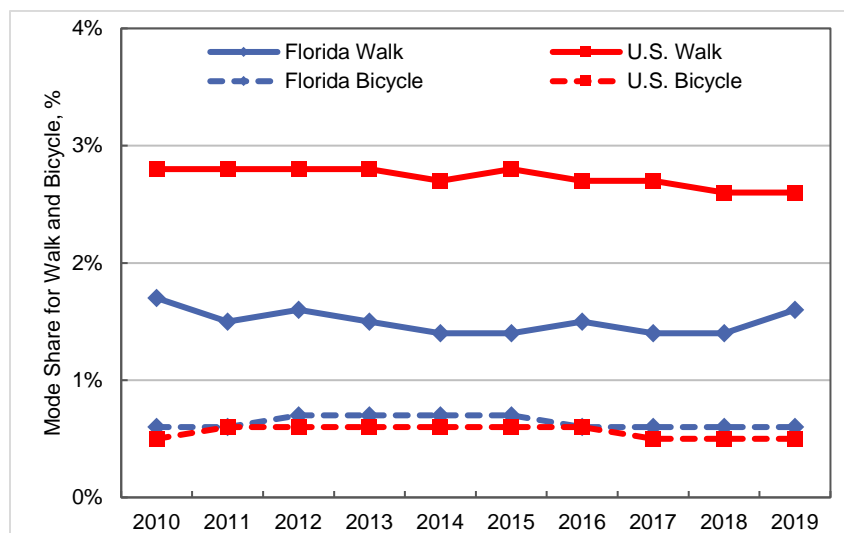


FIGURE 5 - WALK AND BICYCLE COMMUTING

Mean commute times continued to increase for both Florida and the U.S. (**Figure 6**), with Florida's average commute time being 0.8 minute longer than the national average in 2019. Florida's average commute time increased from 28.0 minutes in 2018 to 28.4 minutes in 2019. The national average reached to an all-time high of 27.6 minutes in 2019.

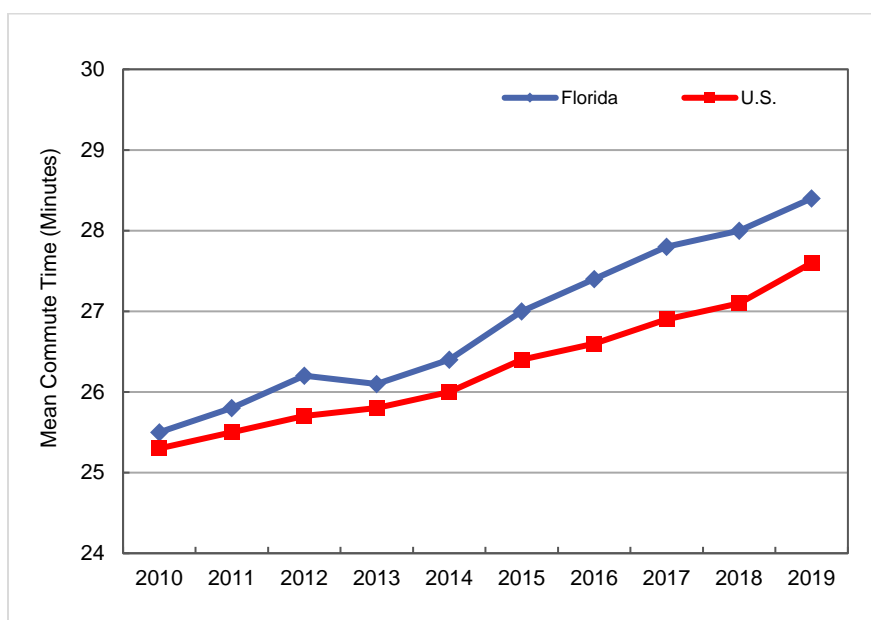


FIGURE 6 - MEAN COMMUTE TIMES

YEAR 2019 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 eight (8) of the 20 MSAs in Florida had transit commute shares less than 1%.

TABLE 2 - TOP FLORIDA MSAS RANKED BY TRANSIT MODE SHARE TO WORK, 2019

Rank	Metropolitan Statistical Area (MSA)	Transit, %
1	Miami-Fort Lauderdale-Pompano Beach	2.9%
2	Gainesville	2.2%
3	Tallahassee	1.9%
4	Orlando-Kissimmee-Sanford	1.4%
5	Jacksonville	1.2%
6	Naples-Marco Island	1.1%
6	Tampa-St. Petersburg-Clearwater	1.1%
8	North Port-Sarasota-Bradenton	1.0%
9	Panama City	0.9%
10	Deltona-Daytona Beach-Ormond Beach	0.8%
11	Port St. Lucie	0.6%
12	Cape Coral-Fort Myers	0.5%
12	Lakeland-Winter Haven	0.5%
14	Crestview-Fort Walton Beach-Destin	0.4%
14	Palm Bay-Melbourne-Titusville	0.4%
14	Pensacola-Ferry Pass-Brent	0.4%
14	Sebastian-Vero Beach	0.4%
14	Sebring-Avon Park	0.4%
19	Ocala	0.1%
19	Key West	0.1%
	Florida	1.6%
	United States	5.0%

Table 3 provides transit commute share data at the county level. Based on data reported in 2019 National Transit Database, there were 33 transit agencies providing public transportation services covering 32 counties. There were additional 21 counties where public transportation is provided by rural providers. The transit mode share data is only available for 34 counties in Florida from the 2019 American Community Survey data. Of the 34 counties, eight (8) had a transit commute share equal to or greater than the state average. Miami-Dade County had the highest transit share of 3.8% in Florida, but it still fell below the national average of 5.0%. The other top-ranked counties had a transit share of 2.0% or higher (Alachua, 2.6%; Broward, 2.6%; Leon, 2.3%; and Orange, 2.0%), while Hernando, Marion, Martin, Monroe, St. Johns, and Santa Rosa Counties had the lowest transit commute shares in 2019.

TABLE 3 - FLORIDA COUNTIES RANKED BY TRANSIT MODE SHARE TO WORK, 2019

Rank	County	Transit %	Rank	County	Transit %
1	Miami-Dade County	3.8%	19	Lee County	0.5%
2	Alachua County	2.6%	19	Okaloosa County	0.5%
2	Broward County	2.6%	19	Pasco County	0.5%
4	Leon County	2.3%	19	Polk County	0.5%
5	Orange County	2.0%	23	Brevard County	0.4%
6	Duval County	1.9%	23	Highlands County	0.4%
7	Palm Beach County	1.7%	23	Indian River County	0.4%
8	Pinellas County	1.6%	26	Lake County	0.3%
9	Collier County	1.1%	27	Clay County	0.2%
9	Manatee County	1.1%	27	Flagler County	0.2%
11	Hillsborough County	1.0%	29	Hernando County	0.1%
12	Bay County	0.9%	29	Marion County	0.1%
12	Sarasota County	0.9%	29	Martin County	0.1%
12	Seminole County	0.9%	29	Monroe County	0.1%
12	Volusia County	0.9%	29	St. Johns County	0.1%
16	St. Lucie County	0.8%	34	Santa Rosa County	0.0%
17	Escambia County	0.7%		Florida	1.6%
17	Osceola County	0.7%		United States	5.0%

Table 4 presents average commute times for 41 Florida counties where data is available for 2019. 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, Clay, and Putnam Counties had the highest average commute time in the state in 2019. Alachua, Leon, 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, 2019

Rank	County	Minutes	Rank	County	Minutes
1	Osceola County	36.0	23	Brevard County	26.1
2	Clay County	35.9	23	Charlotte County	26.1
3	Putnam County	33.6	23	Volusia County	26.1
4	Miami-Dade County	32.8	26	Bay County	26.0
5	Pasco County	32.0	27	Marion County	25.7
6	Nassau County	30.8	28	Okaloosa County	25.6
6	Santa Rosa County	30.8	28	Walton County	25.6
8	Polk County	30.4	30	Collier County	25.5
9	Lake County	30.0	30	Pinellas County	25.5
10	Hernando County	29.5	32	Duval County	24.9
10	Orange County	29.5	33	Sumter County	24.8
12	Broward County	29.1	34	Sarasota County	24.6
13	Hillsborough County	28.8	35	Columbia County	24.5
14	St. Lucie County	28.4	36	Highlands County	23.2
15	Martin County	27.9	37	Indian River County	23.0
15	Seminole County	27.9	38	Escambia County	22.9
17	Lee County	27.6	39	Alachua County	21.6
18	Citrus County	27.5	40	Leon County	20.2
18	St. Johns County	27.5	40	Monroe County	20.2
20	Flagler County	27.3			
21	Palm Beach County	27.0		Florida	28.4
22	Manatee County	26.2		United States	27.6

Figure 7 shows the distribution of one-way commute travel time in Florida by mode. About 55.7% of commuters who drove alone to work had commute times less than 30 minutes in 2019. Carpooling average commute times were slightly shorter than drive-alone commute times with 56.3% 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, 71.7% of transit commutes took longer than 30 minutes.

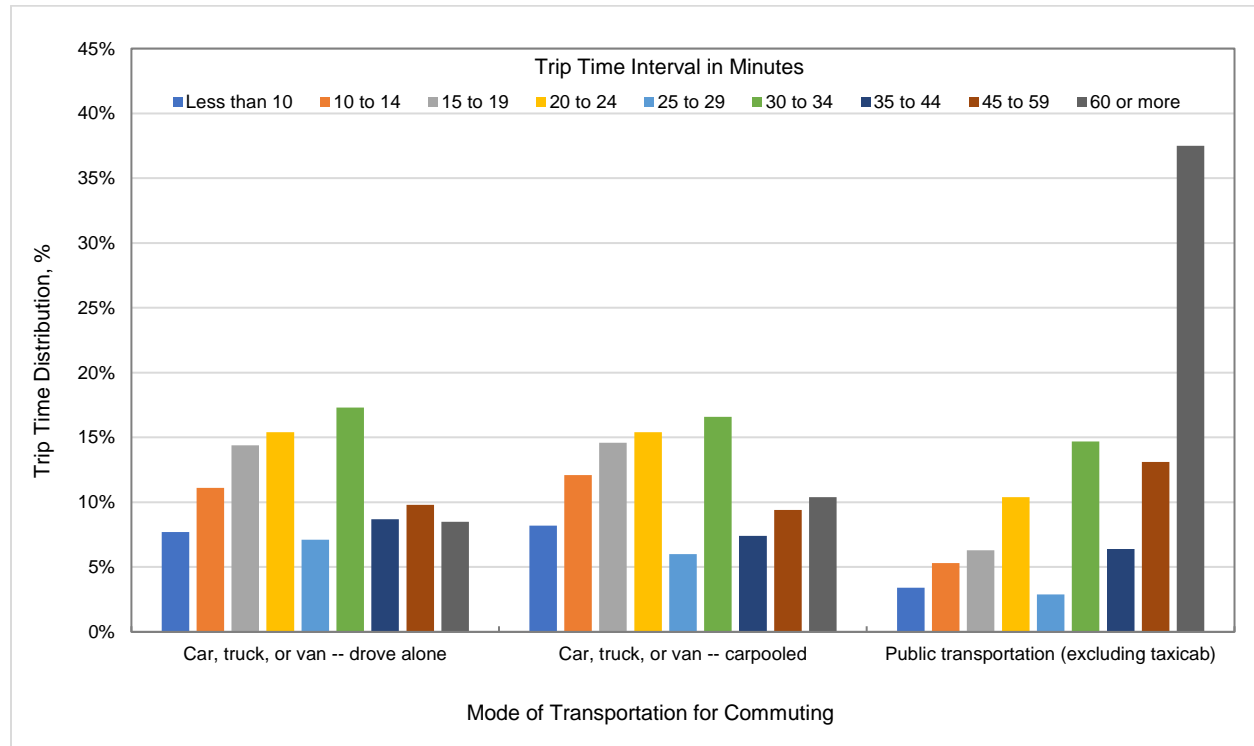


FIGURE 7 – COMMUTE TIME BY MODE

COMPARISON OF COMMUTING CHARACTERISTICS BETWEEN FLORIDA AND OTHER STATES

Table 5 provides ranked data on cross-county commuting for the U.S in 2019. Thirty-nine states had more cross-county commuting than Florida in 2019. Virginia and New Jersey had the highest shares of cross-county commuting, at about 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 19.7% in 2019, while the national average was close to 28%.

TABLE 5 - PERCENT WORKERS WHO WORKED OUTSIDE COUNTY OR STATE OF RESIDENCE, 2019

Rank	State	Percent	Rank	State	Percent
1	Virginia	51.0%	27	Oklahoma	26.2%
2	New Jersey	47.2%	28	Arkansas	25.6%
3	Maryland	46.4%	29	Iowa	25.1%
4	Georgia	42.1%	30	District of Columbia	25.0%
5	Rhode Island	38.4%	31	Kansas	24.7%
6	Mississippi	37.6%	32	Vermont	23.9%
7	Minnesota	36.7%	33	Texas	23.7%
8	New Hampshire	35.7%	34	Maine	23.2%
9	New York	35.6%	35	South Dakota	22.7%
10	Missouri	35.1%	36	Oregon	22.6%
11	Massachusetts	34.6%	37	Delaware	22.4%
12	Colorado	34.1%	38	Nebraska	21.8%
13	West Virginia	33.5%	39	Idaho	19.8%
14	Indiana	32.5%	40	Florida	19.7%
14	Kentucky	32.5%	41	Washington	18.6%
16	Louisiana	30.9%	42	Utah	17.8%
16	Michigan	30.9%	43	California	17.6%
18	Ohio	30.7%	44	New Mexico	15.6%
19	Pennsylvania	30.2%	44	North Dakota	15.6%
19	South Carolina	30.2%	46	Montana	9.8%
21	North Carolina	29.0%	47	Wyoming	8.8%
22	Tennessee	28.7%	48	Alaska	7.0%
23	Wisconsin	28.3%	49	Arizona	6.1%
24	Alabama	28.0%	50	Nevada	5.5%
25	Connecticut	27.2%	51	Hawaii	1.0%
26	Illinois	27.0%		United States	27.9%

Figure 8 provides comparisons across states in Single Occupancy Vehicle (SOV) shares. The SOV share in Florida was 78.1% in 2019, which was lower than that of 29 other states but still higher than the national average of 75.9%.

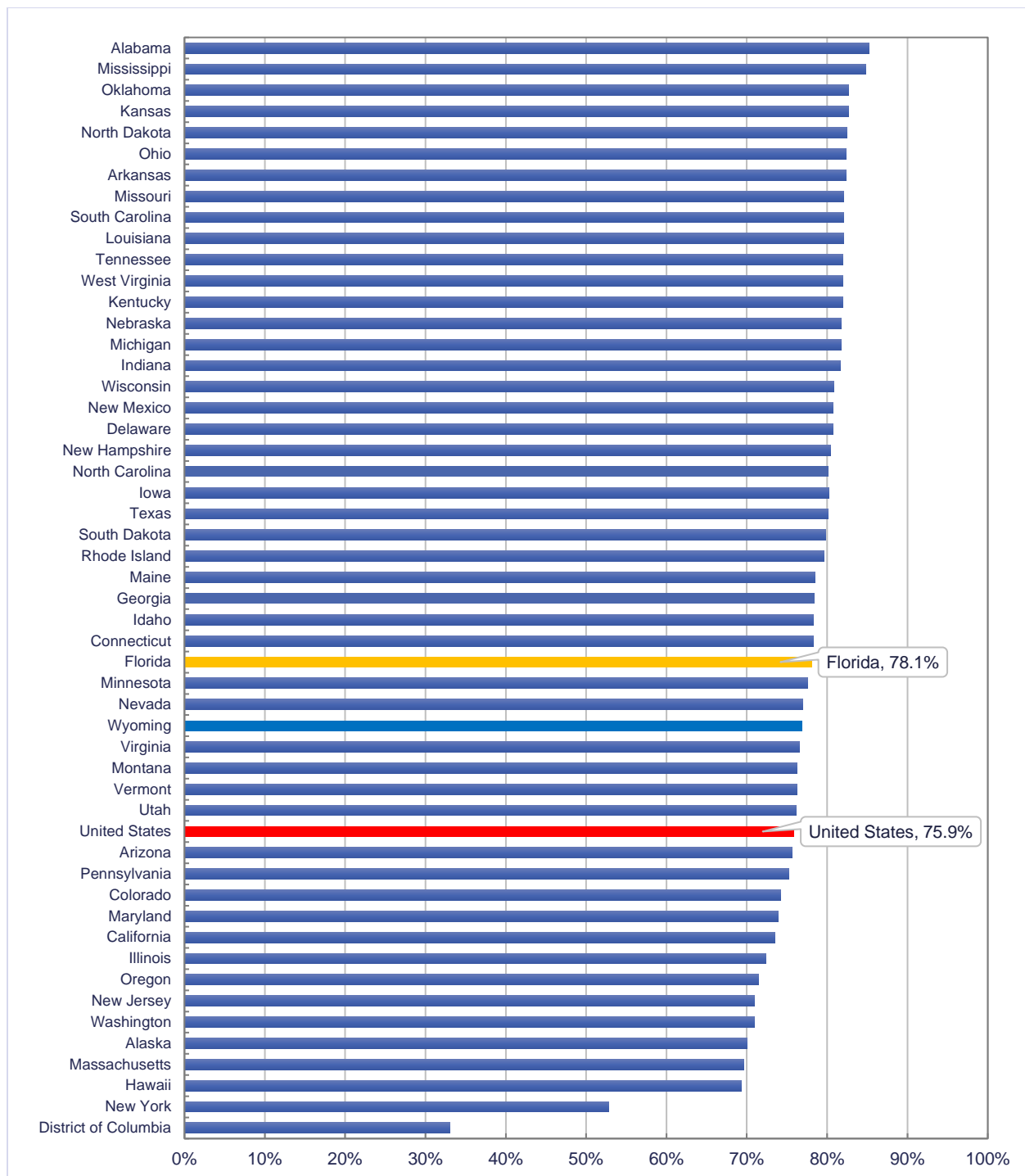


FIGURE 8 - PERCENT SOV FOR ALL STATES AND THE U.S., 2019

Figure 9 compares average commute times by all modes across the nation in 2019. With an average commute time of 28.4 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 27.6 minutes.

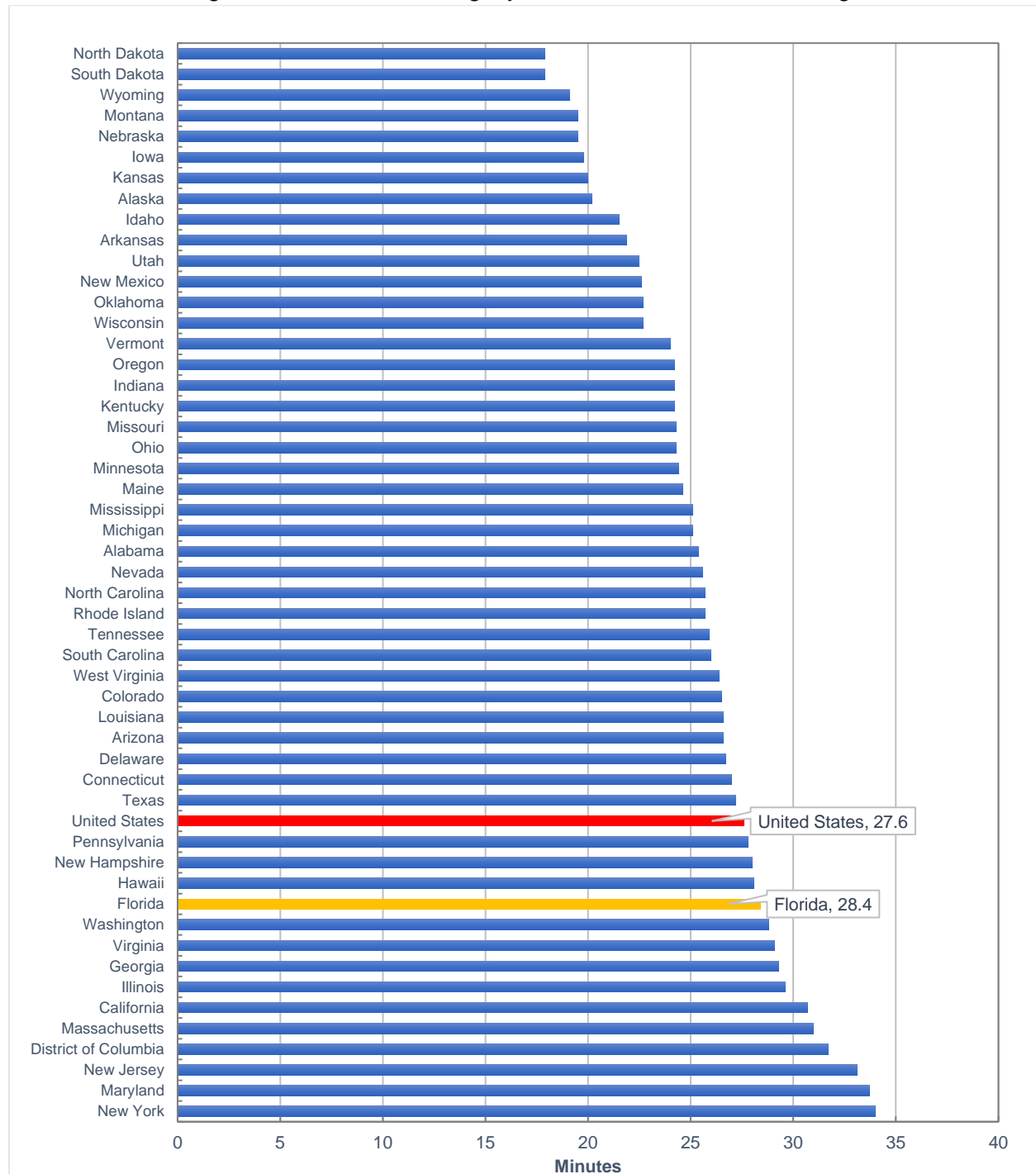


FIGURE 9 - AVERAGE COMMUTE TIME BY ALL MODES FOR ALL STATES AND THE U.S., 2019

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 1.38% of the Florida households for 2019 ACS), many of the small differences over time and between locations may not be statistically significant.