

2023 COMMUTING TRENDS IN FLORIDA

A Special Report based on 2023 American Community Survey (ACS) One-Year Estimate

**Systems Forecasting
& Trends Office**

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2023 FLORIDA COMMUTING TRENDS SUMMARY

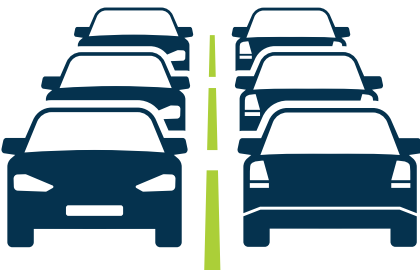
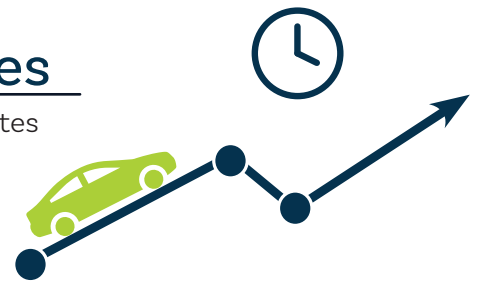


1 Increased Auto Availability

Florida's zero-vehicle households decreased to 5.8% in 2023 from 6.0% in 2022. This compares with a national level of 8.4% in 2023.

2 Increase in Overall Commute Times

The average one-way commute time in Florida grew from 28.0 minutes in 2022 to 28.5 minutes in 2023. The same trend was observed nationally as the average commute time rose from 26.4 minutes to 26.8 minutes. The Florida travel time in 2023 has surpassed the pre-pandemic levels of 2019 (28.4 minutes).



3 More Mobile Work Force

In 2023, 17.1% of Florida commuters worked outside their county or the state of residency, compared to 16.6% in 2022. Nationally, 22.0% of commuters worked outside their county or state of residence, an increase of 0.5% from 2022.

4 Decrease in No-Worker Households

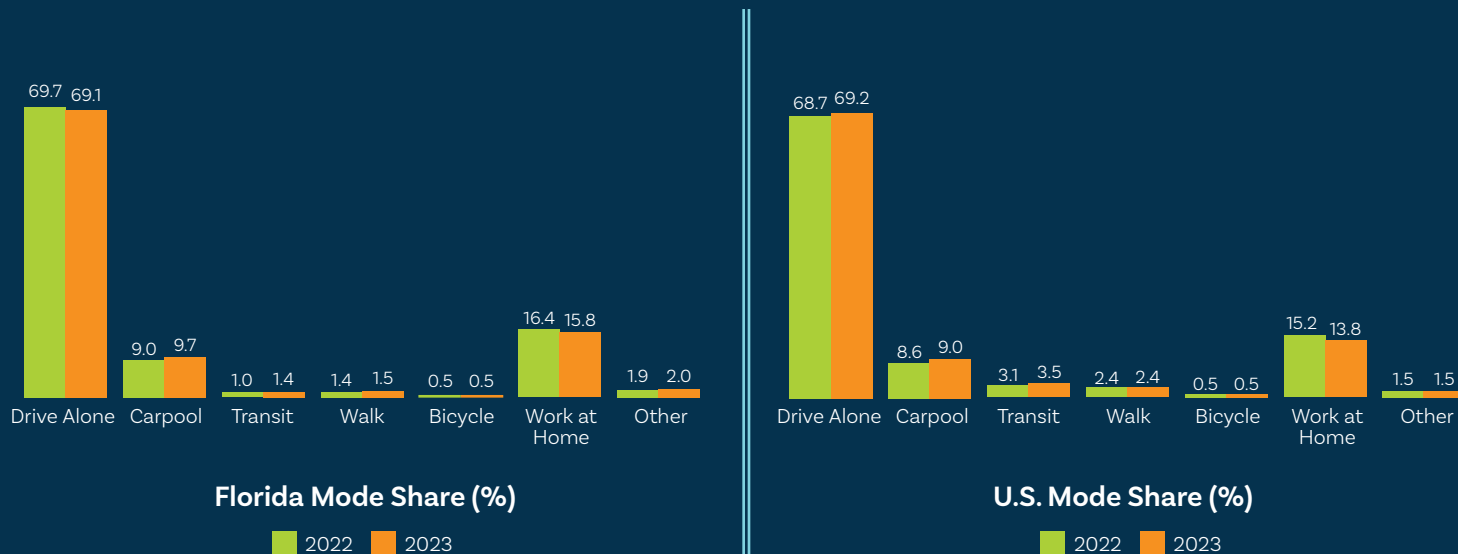
In 2023, the share of households with zero workers decreased from 30.0% in 2022 to 29.8% in Florida. The share of households with zero workers fell from 26.3% to 26.0% during the same time period nationally.



5 Large Work-at-Home Population

Among Florida workers, 15.8% worked from home in 2023, which is slightly lower than the 16.4% in 2022 but still far higher than the 7.0% that worked from home pre-pandemic in 2019. This is consistent with the national trend where 13.8% workers worked from home in 2023 compared to 15.2% in 2022, both were much higher than the 5.7% in 2019.

Changes in Commuting Mode Shares



Continued dominance by driving alone

In Florida, 69.1% of commuters drove alone in 2023, which is slight lower than 2022 and the national average for the same year. This figure remains significantly lower than the pre-pandemic level of 78.1% in 2019.



Slightly more carpooling

Carpooling remains the second most common means of commuting. Its share increased from 9.0% in 2022 to 9.7% in 2023 for Florida. The share for the U.S. also increased from 8.6% in 2022 to 9.0% in 2023.



Increase in commuting by transit

From 2022 to 2023, transit use for commuting increased by 0.4% to reach 1.4% in Florida. Nationally, transit use also saw a slight increase of 0.4% to reach 3.5%.



Increase in commuting by walking

Commuting by walking rose by 0.1% to reach 1.5% in Florida from 2022 to 2023. Meanwhile, the national share remained unchanged at 2.4% during the same period.



Increase in commuting by bicycling

The share of bicycle commuting in Florida and nationwide remained unchanged from 2022 to 2023, both at 0.5%



DETAILED COMMUTING TRENDS

While commuting constitutes only a portion of the 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 U.S.

The American Community Survey (ACS) is a demographics survey program conducted by the U.S. Census Bureau. Compared to the decennial census, the ACS is sent out annually to a random sample of addresses (about 3.5 million) in the country and includes topics that are not on the decennial census, such as transportation. The ACS provides current data to communities every year in the form of estimates. This report is based on the ACS 1-year estimates, which can be accessed from the U.S. Census Bureau's data platform: <https://data.census.gov/>. For more 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 summarizes the 10-year commuting trends for Florida and the U.S. from 2013 to 2023. The year 2020 is excluded from the analysis, because the 2020 ACS data collection process was disrupted by the COVID-19 pandemic and resulted in lower survey response rates. There were serious data quality issues and non-response bias in the 2020 ACS 1-year data.

Table 1 - Florida and U.S. ACS Trends

	2013	2014	2015	2016	2017	2018	2019	2021	2022	2023
VEHICLES AVAILABLE - FLORIDA										
No vehicles available	7.2%	6.9%	6.8%	6.6%	6.3%	6.2%	6.1%	5.9%	6.0%	5.8%
1 vehicle available	41.6%	41.2%	41.0%	40.4%	39.7%	39.5%	38.9%	38.9%	38.9%	39.1%
2 vehicles available	37.7%	38.2%	38.0%	38.1%	38.5%	38.1%	38.2%	38.4%	38.4%	38.3%
3 or more vehicles available	13.5%	13.7%	14.2%	14.9%	15.5%	16.2%	16.8%	16.8%	16.7%	16.9%
VEHICLES AVAILABLE - U.S.										
No vehicles available	9.1%	9.1%	8.9%	8.7%	8.6%	8.5%	8.6%	8.0%	8.3%	8.4%
1 vehicle available	33.9%	33.7%	33.5%	33.2%	32.7%	32.5%	32.4%	32.9%	33.2%	33.3%
2 vehicles available	37.3%	37.3%	37.2%	37.1%	37.3%	37.1%	36.9%	37.1%	36.9%	36.5%
3 or more vehicles available	19.7%	19.9%	20.3%	21.0%	21.5%	21.9%	22.1%	21.9%	21.6%	21.7%
COMMUTING TO WORK - FLORIDA										
Car, truck, or van - drove alone	79.6%	79.7%	79.7%	79.2%	79.4%	79.1%	78.1%	70.5%	69.7%	69.1%
Car, truck, or van - carpooled	9.4%	9.1%	8.9%	9.2%	9.1%	9.4%	9.1%	8.5%	9.0%	9.7%
Public transportation (not taxi)	2.1%	2.1%	2.2%	2.1%	1.7%	1.7%	1.6%	1.0%	1.2%	1.4%
Walked	1.5%	1.4%	1.4%	1.5%	1.4%	1.4%	1.6%	1.3%	1.4%	1.5%
Bicycle	0.7%	0.7%	0.7%	0.6%	0.6%	0.6%	0.6%	0.4%	0.5%	0.5%
Other means	1.5%	1.5%	1.5%	1.5%	1.7%	1.7%	2.0%	1.7%	1.9%	2.0%
Worked at home	5.1%	5.4%	5.6%	6.0%	6.1%	6.2%	7.0%	16.6%	16.4%	15.8%
COMMUTING TO WORK - U.S.										
Car, truck, or van -- drove alone	76.4%	76.5%	76.6%	76.3%	76.4%	76.3%	75.9%	67.8%	68.7%	69.2%
Car, truck, or van -- carpooled	9.4%	9.2%	9.0%	9.0%	8.9%	9.0%	8.9%	7.8%	8.6%	9.0%
Public transportation (not taxi)	5.2%	5.2%	5.2%	5.1%	5.0%	4.9%	5.0%	2.5%	3.1%	3.5%
Walked	2.8%	2.7%	2.8%	2.7%	2.7%	2.6%	2.6%	2.2%	2.4%	2.4%
Bicycle	0.6%	0.6%	0.6%	0.6%	0.5%	0.5%	0.5%	0.4%	0.5%	0.5%
Other means	1.3%	1.2%	1.2%	1.2%	1.3%	1.3%	1.4%	1.5%	1.5%	1.5%
Worked at home	4.4%	4.5%	4.6%	5.0%	5.2%	5.3%	5.7%	17.9%	15.2%	13.8%
ZERO-WORKER HOUSEHOLDS										
Florida	32.7%	32.1%	32.2%	32.0%	31.9%	31.6%	31.0%	31.2%	30.0%	29.8%
U.S.	27.0%	26.9%	26.8%	26.6%	26.5%	26.5%	26.3%	27.4%	26.3%	26.0%
MEAN TRAVEL TIME TO WORK										
Florida (mins)	26.1	26.4	27.0	27.4	27.8	28.0	28.4	27.1	28.0	28.5
U.S. (mins)	25.8	26.0	26.4	26.6	26.9	27.1	27.6	25.6	26.4	26.8

Both in Florida and nationally, the share of people working from home increased gradually from 2013 to 2019. However, the percentage of home-based workers more than doubled in Florida during the initial phase of the Covid-19 Pandemic, growing from 7.0% in 2019 to 16.6% in 2021. In the meantime, the share of workers working from home almost tripled in the U.S., rising from 5.7% in 2019 to 17.9% in 2021 (Figure 1). In 2022, as public health protection measures ended, the percentage of people working from home saw a decline in Florida to 16.4%, but higher decline in the nation, to 15.2%. The trend continued in 2023 as more workers returned to their place of employment for work. The share of work-at-home dropped to 15.8% in Florida, and 13.8% in the U.S.

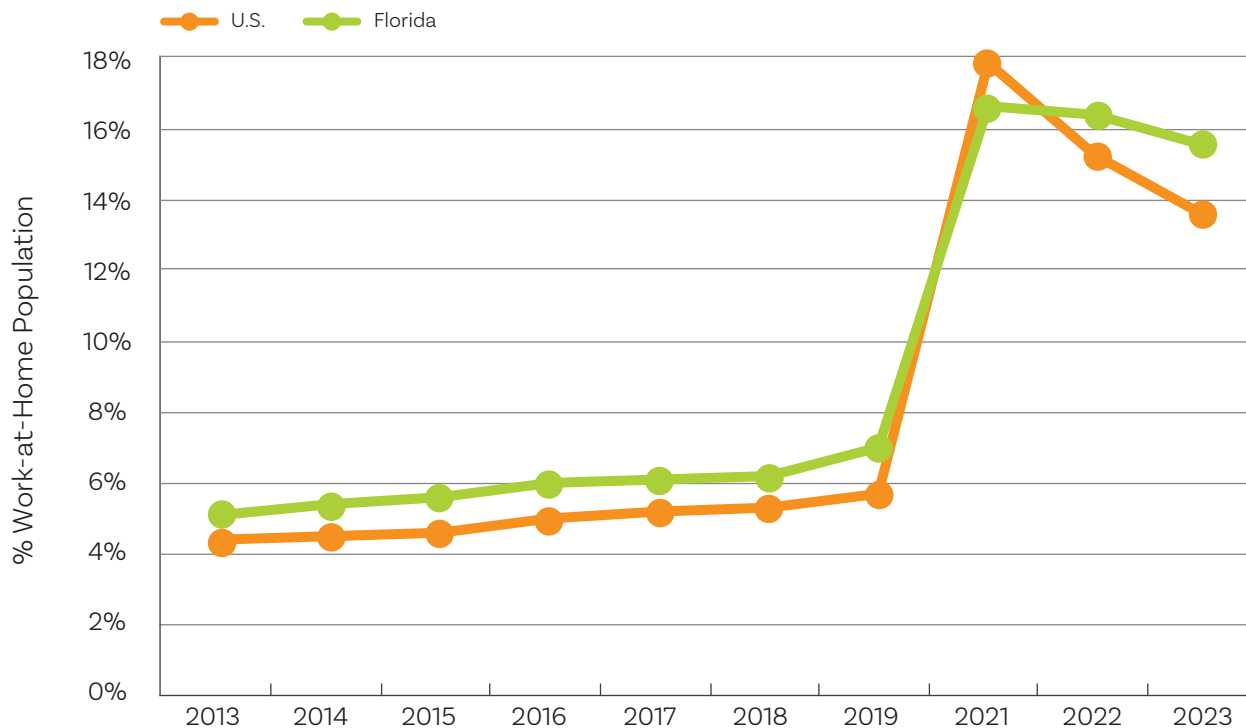


Figure 1 - Work-at-Home Share, Florida vs. U.S.

Florida has a higher share of households with no workers than the national average in large part due to its concentration of retirees. In Florida, the share of households with no workers was 29.8% in 2023. This is a slight decrease compared to 2022 (30.0%) (Figure 2). The share of households with no workers in the U.S. was 26.0% in 2023, which was also lower than its 2022 value (26.3%).

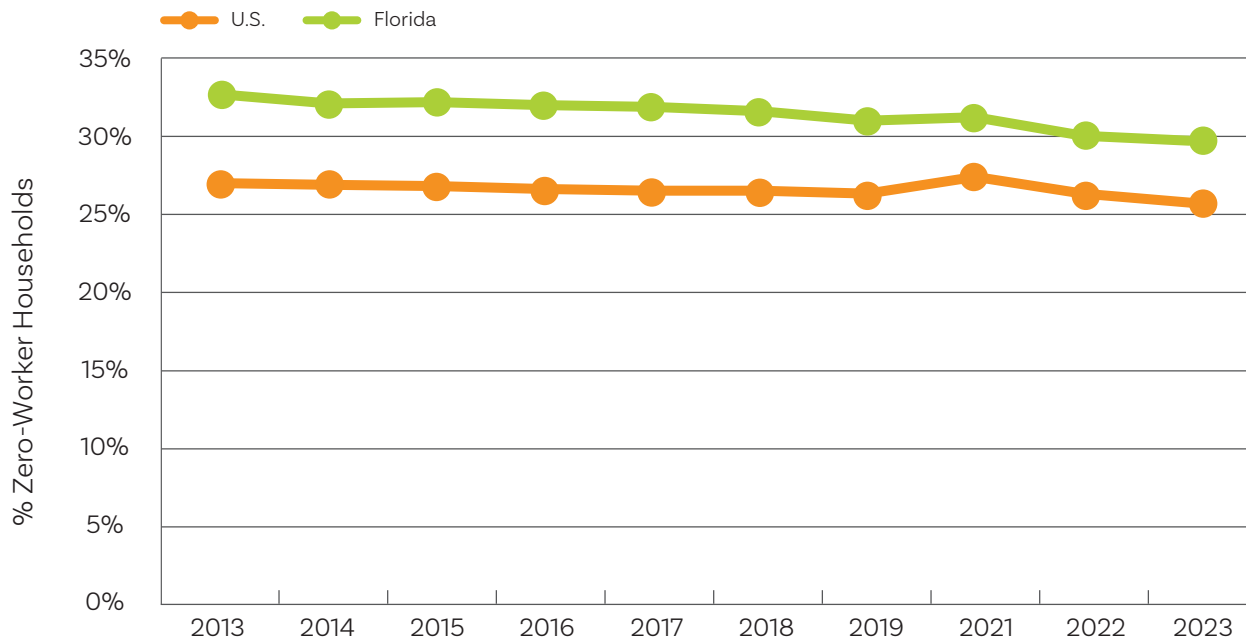


Figure 2 - Households with No Workers

As presented in Figure 3, the share of zero-car households in Florida decreased from 7.2% in 2013 to 5.9% 2021. There was a slight uptick in 2022 when the share of zero-car households increased to 6.0%. The share then fell back down to 5.8% in 2023. In the US, the share of zero-car households showed a continuous decreasing trend from 2013 (9.1%) to 2018 (8.5%). The trend was reversed in 2019 when the share of zero-car households increased to 8.6%. There was a drop again in 2021 as the share decreased to 8.0%. The share of zero-car households began to increase in 2022 (8.3%), and the trend continued in 2023 when the share rose to 8.4%. In general, Florida's share of zero-car households is approximately 2% lower than the national value.

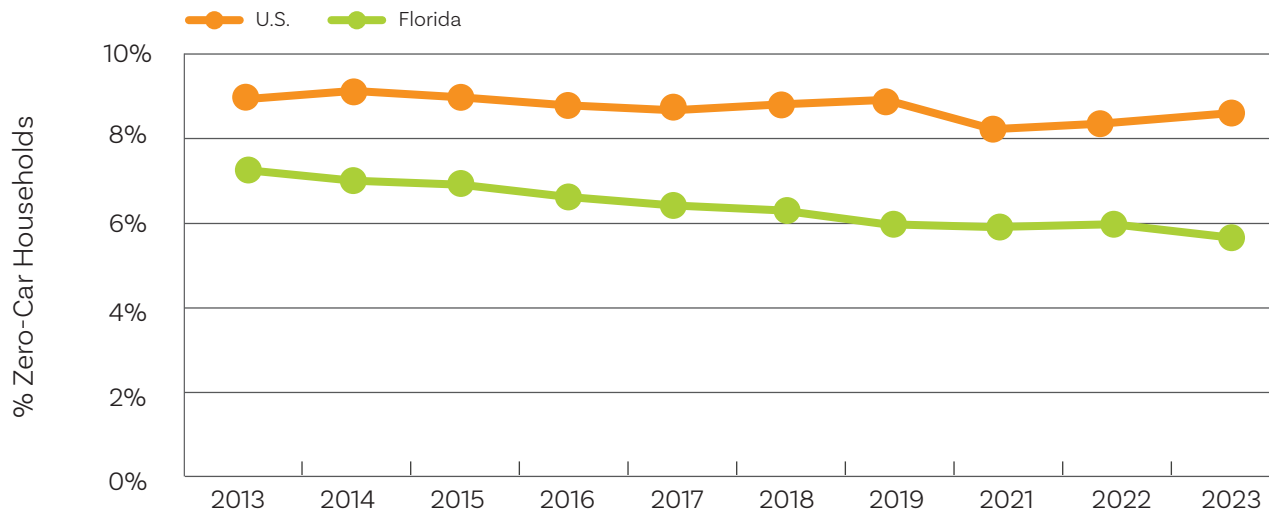


Figure 3 - Zero-Car Households

Figure 4 compares Florida and national trends in commuting via carpool and transit. In 2023, the mode share of carpool in Florida (9.7%) was slightly higher than the national average (9.0%), while the mode share of commuting by transit in Florida (1.4%) was less than half of the national average (3.5%). From 2021 to 2023, the mode share of carpool saw a steady increase both in Florida and nationally. The same trend can be overserved in the mode share of public transportation as well.

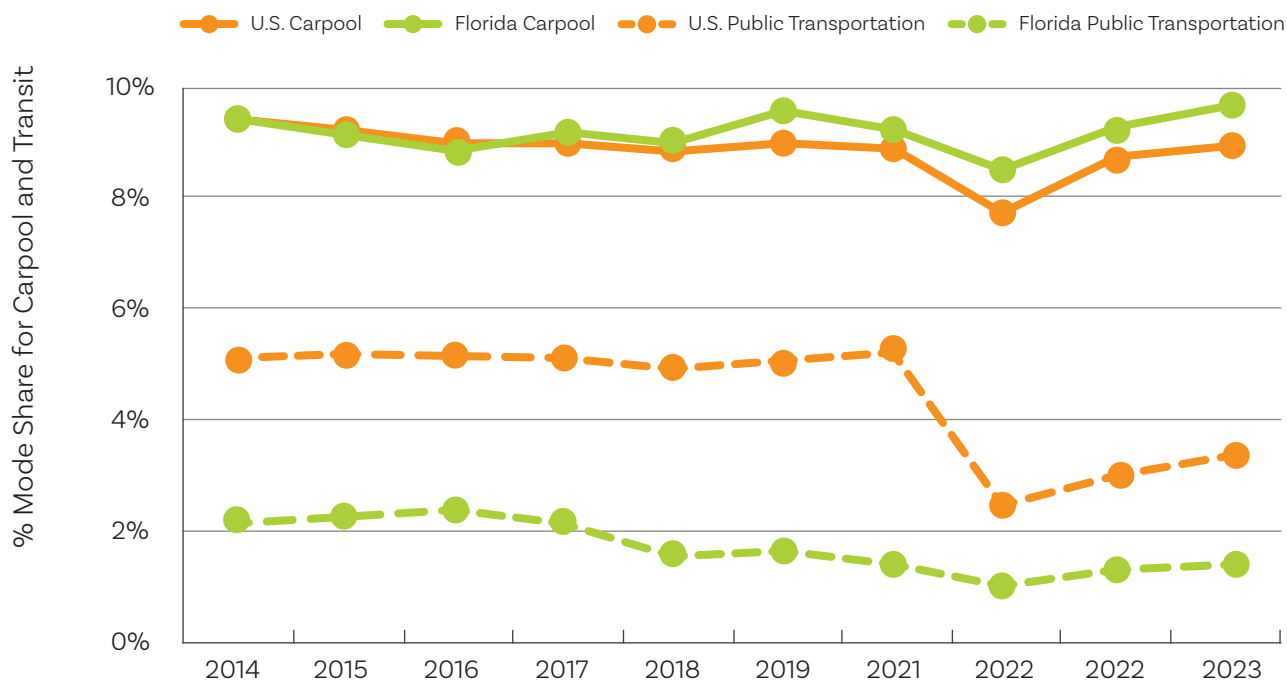


Figure 4 - Transit and Carpool Commuting

Florida and national shares of walk and bike commuting exhibited slight fluctuations over the past decade (Figure 5). While Florida consistently had a much smaller share of walking commuters than the national average, Florida's share of bicycle commuters remained equal to or marginally higher than the national share. In 2023, the shares of bicycle commuters remained the same as those in 2022 both in Florida and nationally. In the meantime, walk commuters saw a slight increase in Florida but kept unchanged nationally.

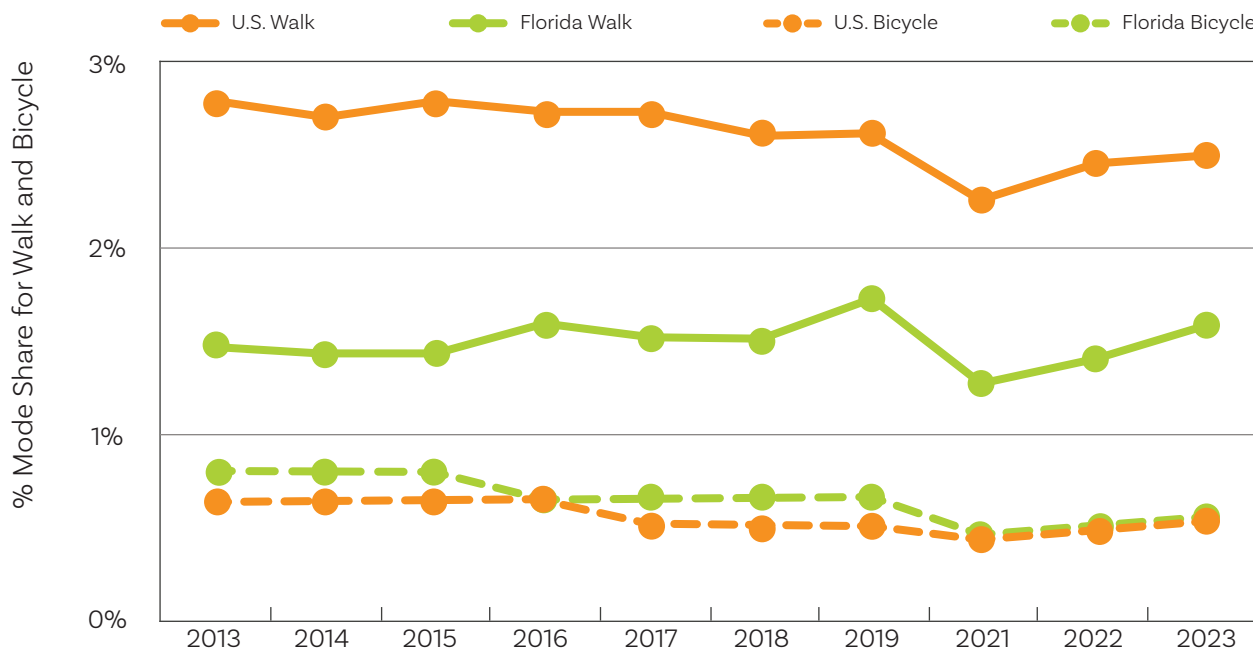


Figure 5 - Walk and Bicycle Commuting

Mean commute times have shown an overall growing trend both in Florida and nationally through 2019 (Figure 6) and possibly in early part of 2020 before the pandemic shutdown went into effect. The year 2021 saw a significant decrease in commute times as the COVID-19 restrictions were still in place. In 2022, as the pandemic restrictions loosened and more employees returned to work, the average commute times began to rise again, even though still below the 2019 level. The same trend continued in 2023 as more workers travel to their place of employment to work. Florida's average commute time increased to 28.5 minutes, while the national average rose to 26.8 minutes. In general, Florida commuters spent more than 1.7 minutes traveling to work compared to their counterparts nationally.

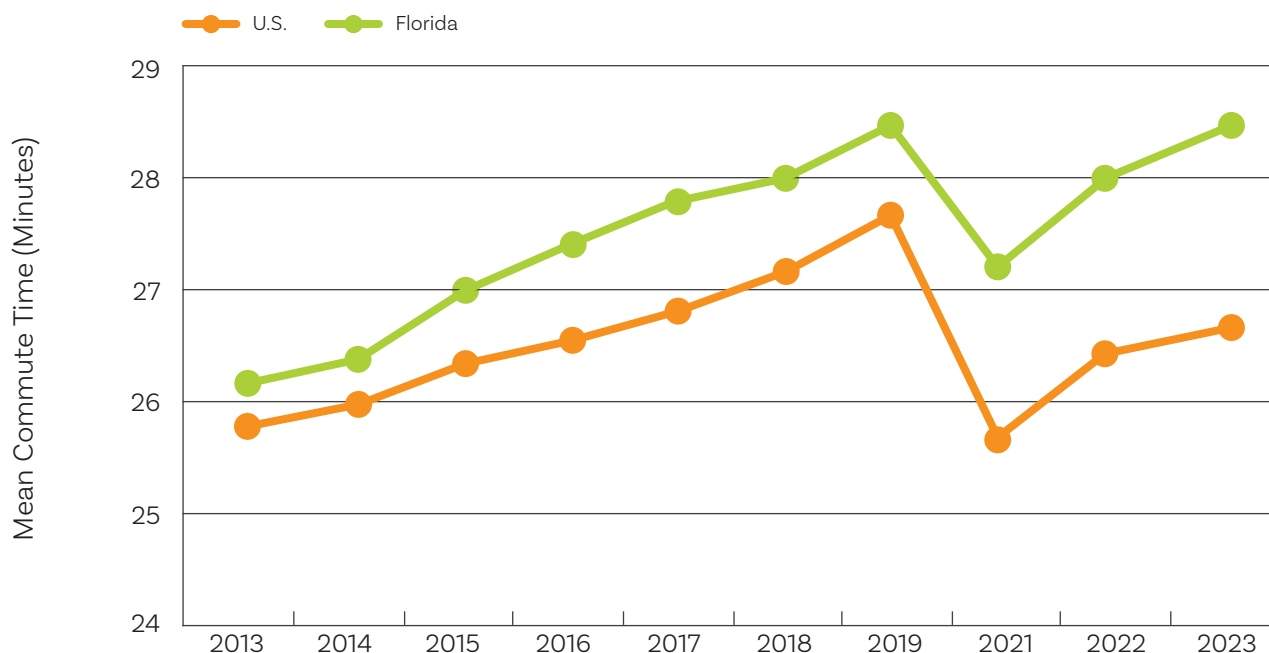


Figure 6 - Mean Commute Times



Year 2023 Commuting Characteristics in Florida

Table 2 shows the transit mode shares for commuting in Metropolitan Statistical Areas (MSAs) in Florida, in comparison to the state and national values. Transit mode shares in all Florida MSAs were below the national average. The transit commuting share in the state of Florida is 1.36%. Only three (3) of the MSAs were above 1.36%: Miami-Fort Lauderdale-West Palm Beach, Gainesville, and Tallahassee.

Table 2 - Florida MSAs Ranked by Transit Mode Share to Work, 2023

Rank	Metropolitan Statistical Area (MSA)	Transit, %
1	Miami-Fort Lauderdale-West Palm Beach	2.75%
2	Gainesville	2.12%
3	Tallahassee	1.83%
4	Tampa-St. Petersburg-Clearwater	1.05%
5	Orlando-Kissimmee-Sanford	0.99%
6	Naples-Marco Island	0.96%
7	North Port-Bradenton-Sarasota	0.70%
8	Cape Coral-Fort Myers	0.61%
8	Panama City-Panama City Beach	0.61%
10	Deltona-Daytona Beach-Ormond Beach	0.55%
11	Jacksonville	0.50%
11	Lakeland-Winter Haven	0.50%
13	Crestview-Fort Walton Beach-Destin	0.36%
13	Port St. Lucie	0.36%
15	Pensacola-Ferry Pass-Brent	0.29%
16	Palm Bay-Melbourne-Titusville	0.27%
17	Ocala	0.25%
	Florida	1.36%
	United States	3.53%



Table 3 provides transit commute share data at the county level. The transit mode share data is only available for twenty-five counties in Florida from the 2023 American Community Survey. Miami-Dade County had the highest transit share of 3.85% in Florida, followed by Leon County (2.26%). Four (4) other counties had a transit commute share greater than the state average (1.36%): Broward County, Palm Beach County, Pinellas County, and Orange County.

Table 3 - Florida Counties Ranked by Transit Mode Share to Work, 2023

Rank	County	Transit, %	Rank	County	Transit, %
1	Miami-Dade County	3.85%	16	Volusia County	0.45%
2	Leon County	2.26%	17	Escambia County	0.42%
3	Broward County	2.06%	18	Sarasota County	0.38%
4	Palm Beach County	1.64%	19	St. Lucie County	0.35%
5	Pinellas County	1.56%	20	Okaloosa County	0.34%
6	Orange County	1.37%	21	Lake County	0.29%
7	Hillsborough County	1.14%	22	Brevard County	0.27%
8	Manatee County	1.01%	23	Marion County	0.25%
9	Collier County	0.96%	24	Pasco County	0.16%
10	Osceola County	0.78%	25	St. Johns County	0.13%
11	Duval County	0.75%			
12	Bay County	0.66%			
13	Lee County	0.61%			
14	Seminole County	0.51%		Florida	1.36%
15	Polk County	0.50%		United States	3.53%

Table 4 presents average commute times for forty-one counties in Florida where data is available in the 2023 ACS. Out of the forty-one counties with available data, seventeen counties' average commute times were longer than the state average (28.5 minutes) and twenty-five counties had longer commute times than the national average (26.8 minutes). Osceola, Polk, and Walton counties were the top three counties with the highest average commute times in Florida. The three counties with the lowest average commute times were Leon, Alachua, and Monroe counties.

Table 4 - Florida Counties Ranked by Travel Time to Work, 2023

Rank	County	Minutes
1	Osceola County	36.3
2	Polk County	32.4
2	Walton County	32.4
4	Pasco County	31.9
5	Lake County	31.7
6	Hernando County	31.6
7	Charlotte County	31.5
8	Clay County	31.3
9	Miami-Dade County	30.9
10	St. Lucie County	30.2
11	Nassau County	29.8
12	Putnam County	29.7
13	Lee County	29.6
14	Broward County	29.5
14	Hillsborough County	29.5
14	Santa Rosa County	29.5
17	Manatee County	28.8
18	Volusia County	28.4
19	Citrus County	28.2
20	Orange County	27.8
21	Martin County	27.6
22	Flagler County	27.3

Rank	State	Minutes
22	Okaloosa County	27.3
22	St. Johns County	27.3
25	Pinellas County	27.2
26	Palm Beach County	26.7
27	Marion County	26.5
28	Sumter County	26.1
29	Seminole County	25.6
30	Collier County	25.3
31	Columbia County	25.1
31	Sarasota County	25.1
33	Highlands County	24.9
34	Duval County	24.5
35	Escambia County	24.4
36	Brevard County	24.3
37	Bay County	23.8
38	Indian River County	22.0
39	Leon County	21.7
40	Alachua County	21.6
41	Monroe County	19.7
	Florida	28.5
	United States	26.8



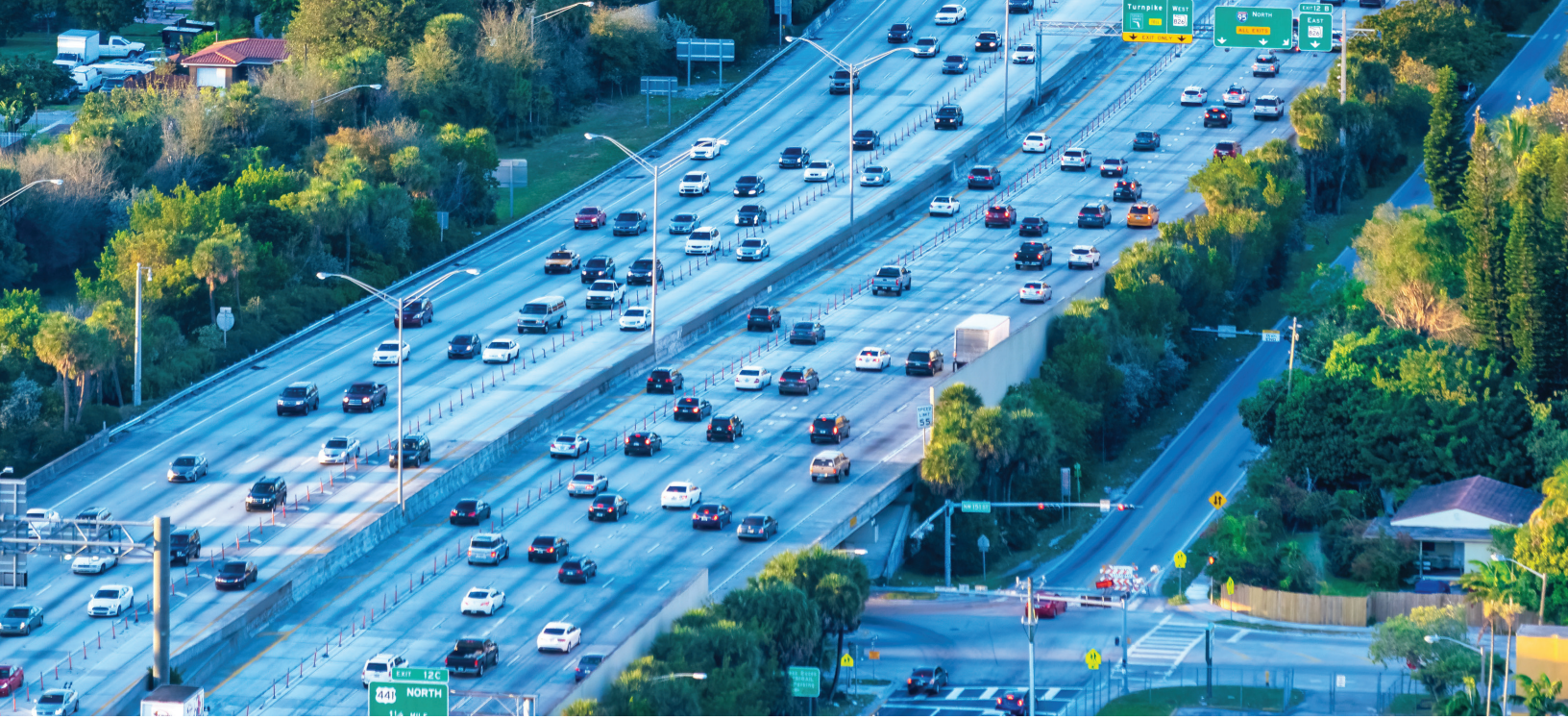


Figure 7 shows the distribution of one-way commute travel time in Florida by mode in 2023. For commuters who drove alone, 56.1% of them had commute times less than 30 minutes. The share of 57.1% is the sum of those that drove alone for less than 10 minutes (7.8%), between 10 and 14 minutes (10.9%), between 15 and 19 minutes (14.3%), between 20 and 24 minutes (15.4%), and between 25 and 29 minutes (7.7%). The percentage of commuters with less than 30 minutes travel time slightly decreased to 55.4% for carpool, and plummeted to 31.5% for transit. Transit trips were noticeably longer due to a combination of wait time, frequent stops, and transfers. About 31.6% of commuters using transit spent 60 or more minutes on a one-way commute trip in 2023.

Trip Time Interval in Minutes

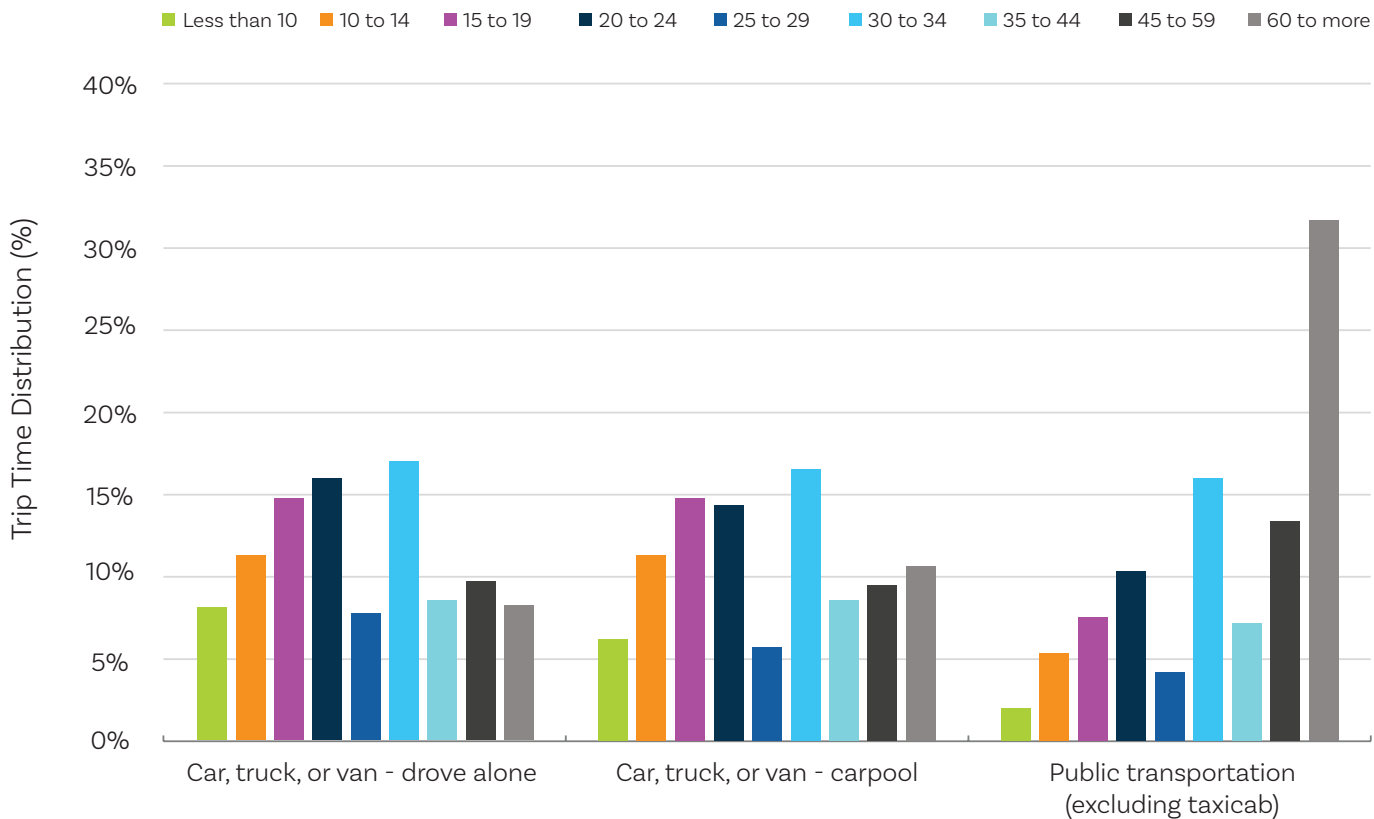


Figure 7 - Commute Time by Mode

Comparison of Commuting Characteristics between Florida and Other States

The percentage of workers that worked outside their county of residence reflects the cross-county commuting activities in a region. [Table 5](#) ranked states based on this metric in 2023. Thirty-two (32) states had higher shares of workers working outside of their county of residence than Florida's state average (17.1%), while twenty-one states have higher shares than the national average (22.0%). Virginia ranked highest in the nation with 38.3%, while District of Columbia had no workers reported working outside their district of residence.

Table 5 - Percent Workers Who Worked Outside County of Residence, 2023

Rank	County	Percent	Rank	State	Percent
1	Virginia	38.3%	27	Connecticut	20.6%
2	Georgia	35.0%	28	Iowa	19.6%
3	Minnesota	30.2%	28	South Dakota	19.6%
4	New York	29.9%	30	Nebraska	18.7%
5	New Jersey	28.4%	31	Rhode Island	18.2%
6	Colorado	27.5%	32	New Hampshire	18.1%
7	Mississippi	27.4%	33	Florida	17.1%
8	Louisiana	27.3%	34	Oregon	16.9%
9	Missouri	27.1%	35	Maine	16.8%
10	Massachusetts	27.0%	36	Kansas	16.5%
11	Michigan	26.5%	36	Utah	16.5%
12	Indiana	26.4%	38	California	15.3%
13	Maryland	25.9%	39	Idaho	15.2%
13	Ohio	25.9%	40	Vermont	14.7%
15	North Carolina	25.1%	41	Washington	13.9%
16	Kentucky	25.0%	42	New Mexico	11.9%
17	Tennessee	24.6%	43	North Dakota	11.4%
18	Alabama	23.0%	44	Montana	7.9%
19	Wisconsin	22.9%	45	Delaware	7.6%
20	Oklahoma	22.7%	46	Alaska	7.0%
21	South Carolina	22.3%	47	Wyoming	4.7%
22	Pennsylvania	21.9%	48	Arizona	4.6%
23	Arkansas	21.1%	49	Nevada	3.7%
24	Texas	21.0%	50	Hawaii	0.5%
25	Illinois	20.9%	51	District of Columbia	0.0%
26	West Virginia	20.8%		United States	22.0%

Figure 8 provides comparisons across states in Single Occupancy Vehicle (SOV) shares. The SOV share in Florida was 69.1% in 2023, which was lower than that of thirty-three other states and the national average of 69.2% as well. Figure 9 presents the same information in a map.

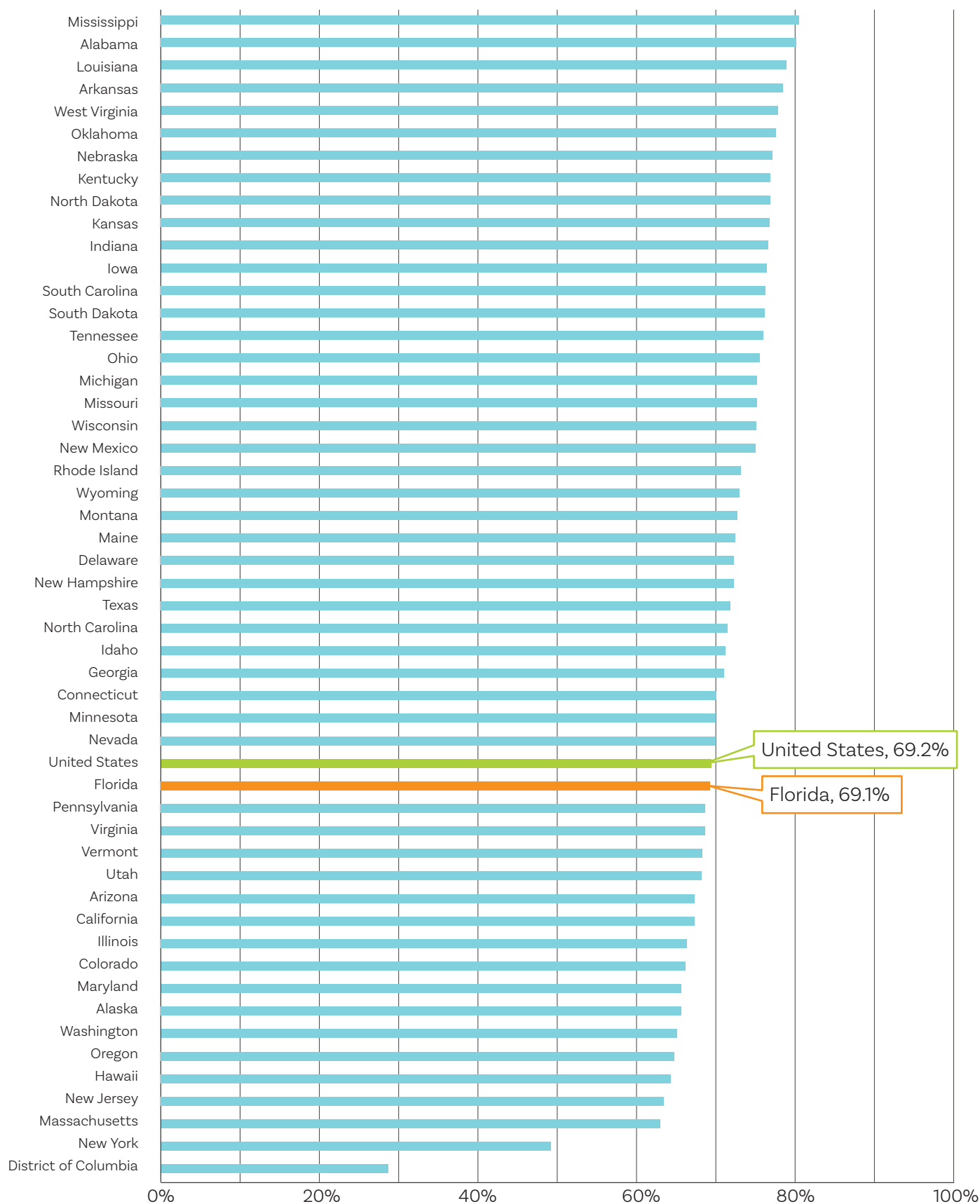


Figure 8 - Percent of SOV for All States and the U.S., 2023

Percent SOV, 2023

Percent SOV, 2023
49.1% 80.3%

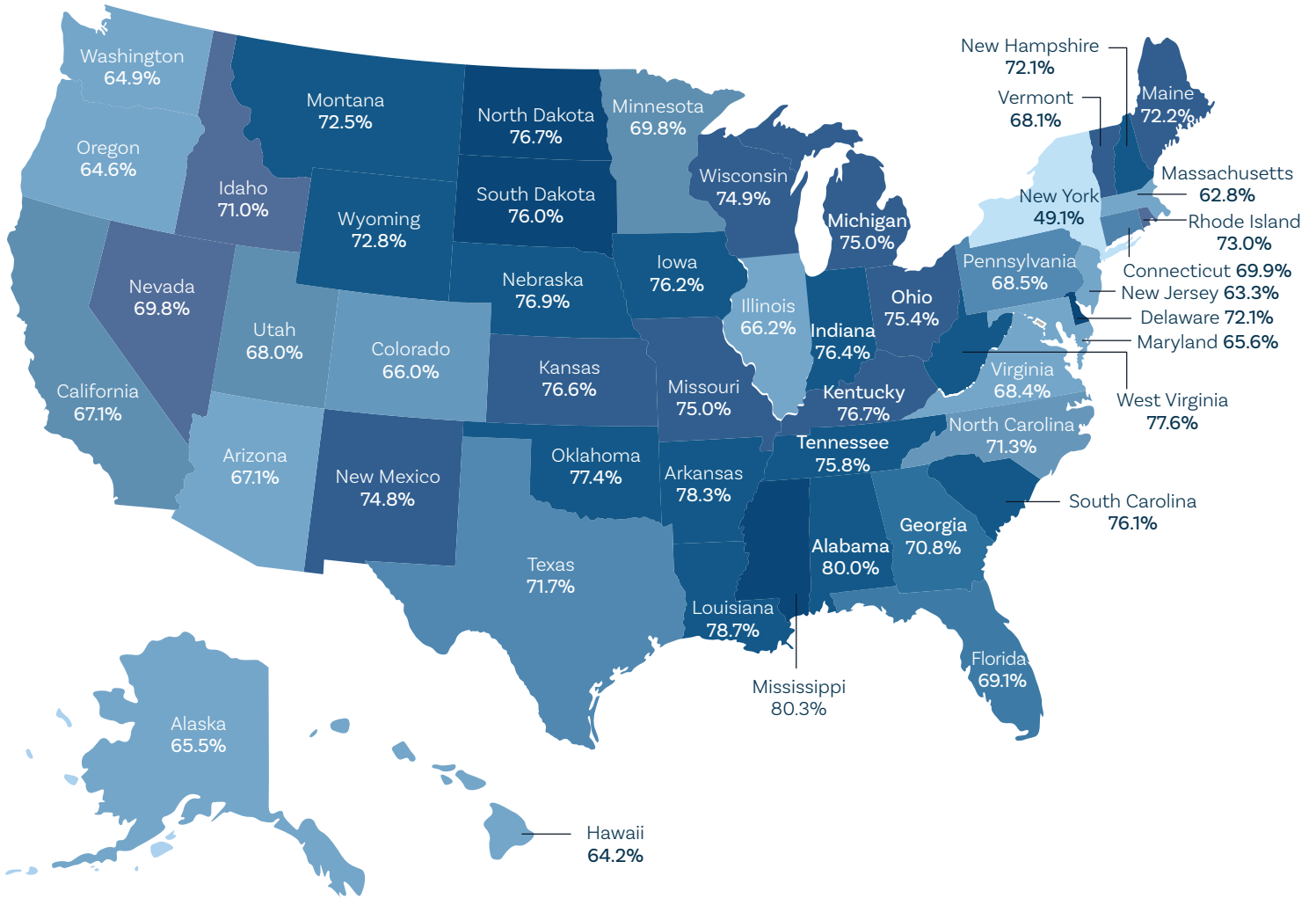


Figure 9 - Map of Percent of SOV for All States in 2023

Figure 10 compares average commute times by all modes across the nation in 2023. With an average commute time of 28.5 minutes, Florida was among the states that had the longest travel times to work. Only six (6) states and the District of Columbia had longer commute times than Florida. The national average commute time (26.8 minutes) was slightly shorter than that of Florida. Figure 11 presents the same information in a map.

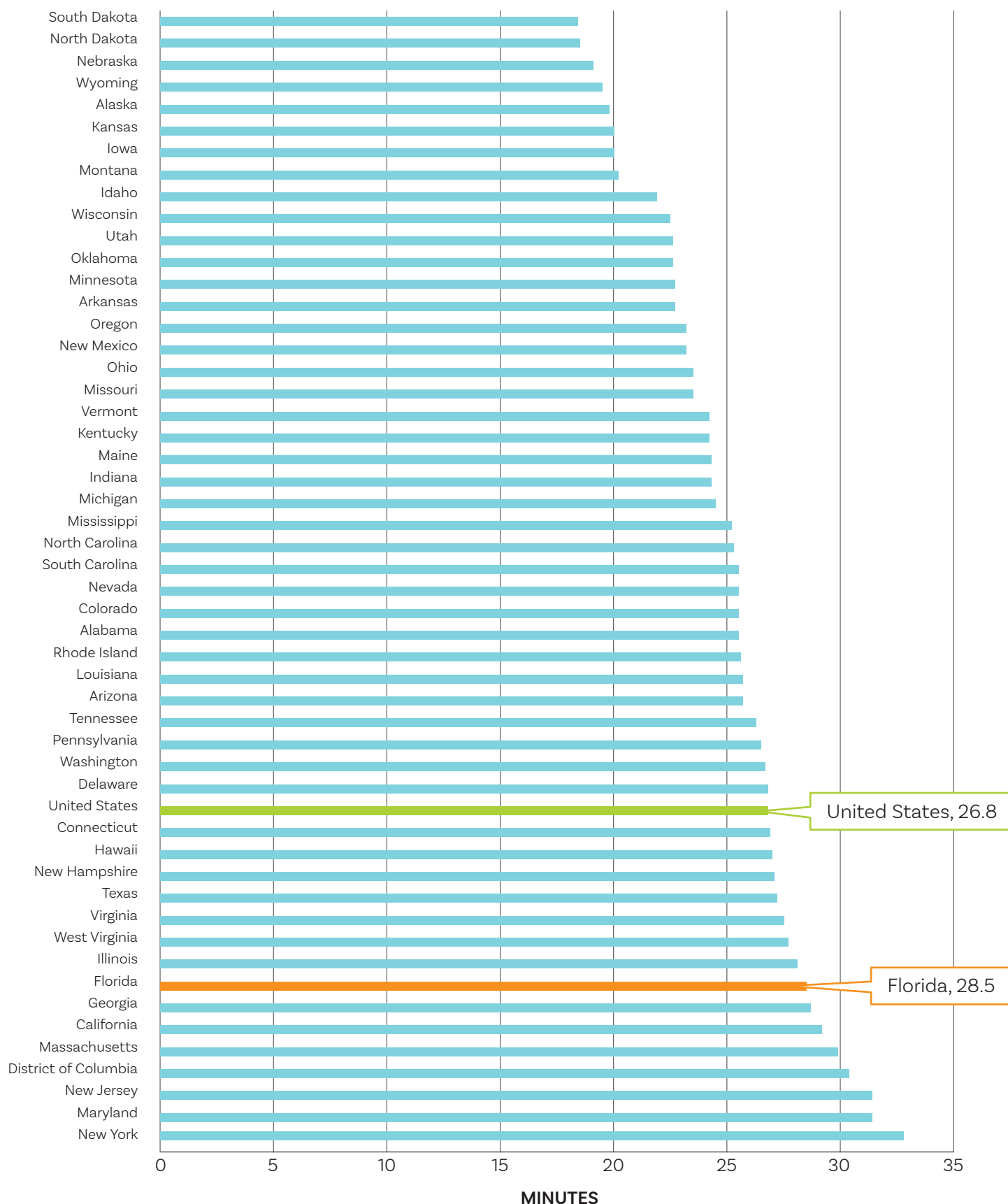


Figure 10 - Average Commute Time by All Modes for All States and the U.S., 2023

Average Commute Time (Minutes)

Average Commute Time, 2023

18.4 32.8

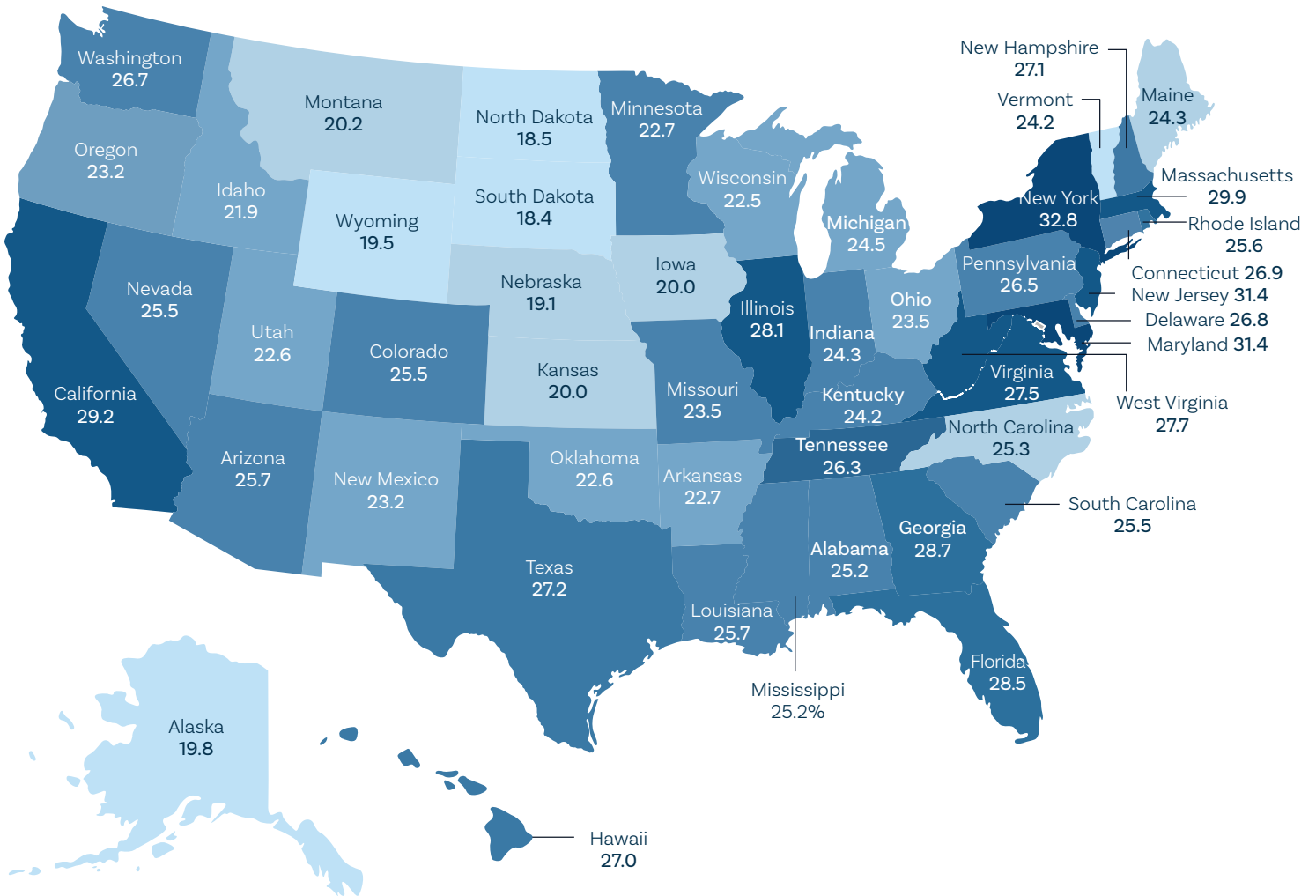


Figure 11 - Map of Average Commute Time by All Modes by State, 2023

SUMMARY AND GENERAL OBSERVATIONS

The COVID-19 pandemic caused significant changes in commuting behaviors both in Florida and in the U.S. between 2019 and 2021, especially regarding home-based work trips. In 2022, as employers and government agencies encouraged workers to return to on-site work while exploring flexible work schedules, there were some gradual movements towards the pre-pandemic norms. Year 2023 saw the continued shift in this direction both in Florida and nationally. The following observations can be made.



The share of work-from-home continued to decline in 2023, reflecting the fact that more workers returned to their place of employment to work. However, there were still close to 16 percent of workers worked from home in Florida, and close to 14 percent in the U.S.

2. The share of workers who drove alone to work in 2023 was still below the pre-pandemic level. There was a continued decrease in the share of drove-alone in Florida from 2022 (69.7%) to 2023 (69.1%). This is opposite to the trend in the U.S. where the share of drove alone continued to grow from 68.7% in 2022 to 69.2% in 2023.



3. The share of workers who carpooled increased both in Florida and nationally from 2022 to 2023, as did the shares of commuting by public transportation and by walking. The share of commuting by bicycling remained unchanged.



4. The average one-way commute time continued to increase from 2022 to 2023 both in Florida and in the U.S., reflecting the growing traffic on the roadways. It was still below the 2019 estimate nationally. However, the average commute time surpassed the 2019 estimate in Florida.

8.9 MILLION



People in Florida who routinely commuted to work in 2023

More than
1.6 MILLION
people worked from home



43%



More than 43% of commuters traveled for more than 30 minutes

Significant Impact on Workers Daily Life



There were approximately 8.9 million people in Florida who routinely commuted to work in 2023, and more than 1.6 million people worked from home. As more than 43% of commuters traveled for more than 30 minutes to get to their workplaces, the commuting experience or its absence, in the case of those who worked from home, has significant impact on travel demand, travel behavior, transportation system and even investment decisions. It will be beneficial to continue to monitor the changes in commuting patterns as future ACS data becomes available.

GLOSSARY

Carpooling

Two or more people share a ride to a common destination in a car, truck or van. Number of persons in the vehicle is used to determine the extent of carpooling and to estimate the number of cars, trucks, and vans in each flow.

Commuting

Commuting (journey to work) refers to a worker's travel from home (place of residence) to work (primary place of work).

Metropolitan/Micropolitan Statistical Area (MSA)

A core area containing a substantial population nucleus, together with adjacent communities having a high degree of economic and social integration with that core. Current MSAs were delineated by the United States Office of Management and Budget (OMB) based on the 2020 Standards. A metropolitan statistical area must have at least one urban area of 50,000 or more inhabitants. A micropolitan statistical area must have at least one urban area of at least 10,000 but less than 50,000 population. The term "core based statistical area" (CBSA) refers collectively to metropolitan and micropolitan statistical areas. For more information, please visit <https://www.census.gov/programs-surveys/metro-micro.html>.

Public Transportation

In the ACS, public transportation includes the following modes: bus; subway or elevated rail; long-distance train or commuter rail; light rail, streetcar, or trolley; and ferryboat.

Peak Period

A timeframe (an hour or multiple hours) during the day when traffic volumes are the highest. Typical peak periods include AM peak period, midday peak period, and PM peak period.

Single Occupancy Vehicle (SOV) Trip

A trip to or from destination by an individual driving alone in a car, truck or van.

Vehicles Available

The number of passenger cars, vans, and pickup or panel trucks of one-ton capacity or less kept at home and available for the use of household members. Vehicles rented or leased for one month or more, company vehicles, and police and government vehicles are included if kept at home and used for non-business purposes. Dismantled or immobile vehicles are excluded, as are vehicles kept at home but used only for business purposes.

Means of Transportation to Work

The principal mode of travel or type of conveyance that the worker usually used to get from home to work during the reference week. Options include car, truck, or van (and the number of people in vehicle); five public transportation modes; taxicab; motorcycle, bicycle, walked, worked from home, and other methods.

Travel Time to Work

The total number of minutes that it usually takes the worker to get from home to work during the ACS survey week.

