

2045

FLORIDA

Transportation Plan

VISION ELEMENT

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INTRODUCTION > OUR TRANSPORTATION FUTURE

In the early days of transportation that involved trains and automobiles to modern land, air, sea, and space travel, Floridians have long valued many forms of innovation in transportation. As we look to the future of transportation in Florida, we imagine new and better ways to move people and goods. Our transportation preferences are spurred by our desires to be connected to our jobs, our friends and family, and the services we need and our desires for safe, convenient, and affordable choices to do so.

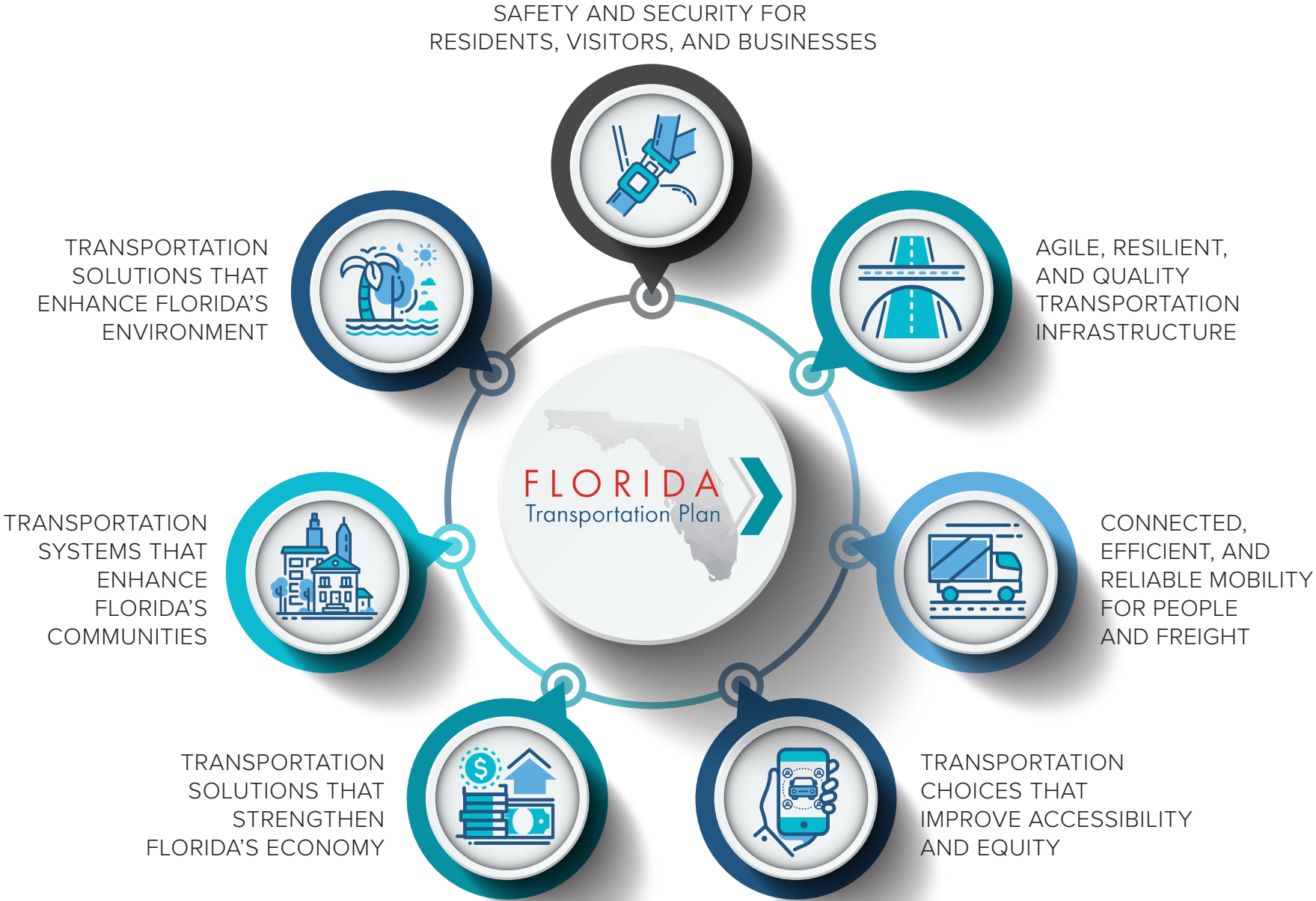
Dramatic leaps in connectivity, rapidly changing technologies, an explosion of data, and new risks and disruptions set the stage for transformations in transportation. Regardless of how we make the journey from now to our future, we are steadfast in our vision for a safe, secure, agile, resilient, quality, connected, efficient, and reliable transportation system that provides affordable and convenient choices – and in our vision that transportation will strengthen our economy and enhance our communities and environment.

This vision is the backdrop for the update of the Florida Transportation Plan (FTP), the single overarching plan guiding Florida’s transportation future. Updated every five years, the FTP has evolved over the past few decades to address changing societal values and preferences, new technologies and innovations, and shifts in demand, resources, and risks.



INTRODUCTION > OUR TRANSPORTATION FUTURE

Through this FTP update, we are embracing a vision of how our transportation system meets the needs of our residents, visitors, and businesses. This vision is focused on **seven goals for Florida’s transportation future**.



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The FTP is a plan for all of Florida, created by, and providing direction to, all organizations involved in planning and managing Florida’s transportation system.

A 34-member Steering Committee with a singular focus on improving Florida’s transportation future is guiding the FTP update. Convened by the Florida Department of Transportation (FDOT), this committee represents local, regional, state, and federal agencies; all modes of transportation; business and economic development organizations; environmental and community partners; and other organizations involved in planning and managing Florida’s transportation system.

The most recent FTP, published in 2015, defined seven long-range goals. The update of the FTP began with revisiting these goals. We asked four questions.

HAVE WE MADE PROGRESS?

We reviewed progress on implementation of the current FTP, as well as changes in performance measures and other key progress indicators. Florida made progress in many areas since 2015, particularly in expanding innovation and modal options in many parts of the state. However, highway traffic delay has continued to increase, suggesting the need to continue to enhance mobility. Of greater concern, an increase in the number of traffic fatalities points to the need for even greater emphasis on improving safety. Transportation investment by FDOT and many partners has increased, but our needs have grown as well.

WHAT WE HEARD

“MOST IMPORTANT ISSUES FOR CUSTOMERS ARE SAFETY, EQUITY, AND USER EXPERIENCE”

“INVEST IN INFRASTRUCTURE THAT PROTECTS OUR ENVIRONMENT AND PROVIDES MORE SAFETY FEATURES”

“OUR FUTURE REQUIRES INCREASED MOBILITY AND ACCESSIBILITY”

“FLORIDA’S WORKFORCE WILL NEED TO DEVELOP NEW SKILLS AS TRANSPORTATION JOBS CHANGE”

“INCREASING FUEL EFFICIENCY AND THE SHIFT TOWARD ELECTRIC VEHICLES ARE PUSHING FLORIDA TOWARD FINDING ALTERNATIVE FUNDING SOLUTIONS”

Samples of public responses to FTP online survey, 2019-2020.

WHAT MATTERS MOST? > OUR PROCESS

WHAT WILL THE FUTURE LOOK LIKE?

We reviewed trends, uncertainties, and potential disruptors shaping the future of Florida over the next few decades. Florida by 2045 is likely to be more populous, more diverse, and more globally integrated. Innovation and technology are likely to reshape nearly every aspect of how we live, learn, work, and do business, including how we pay for transportation. These changes will occur as we face a growing range of risks, from extreme weather to cybersecurity to potential changes in future transportation revenues and costs. All these trends will impact the way people and freight move.

WHAT DO OUR PARTNERS SAY?

We gathered input from statewide, regional, and local partners through Steering Committee and subcommittee meetings, a statewide visioning session, and more than 100 presentations, meetings, webinars, and partner briefings. We also reviewed more than 75 plans developed by FDOT, other state agencies, metropolitan planning organizations, and other partners to identify challenges and opportunities facing Florida’s transportation future.

WHAT DO OUR CUSTOMERS SAY?

Finally, we engaged more than 6,600 participants in a nearly year-long conversation about Florida’s transportation future. This included more than 4,850 participants in the visioning session, partner briefings, and other events. We received more than 1,750 responses from four online surveys covering transportation trends, issues, opportunities, and, most significantly, the values and preferences of Floridians. In addition, we used several channels across multiple social media platforms (Twitter, Facebook, and Instagram) which resulted in nearly 27,000 impressions.



LONG-RANGE
VISIONING SESSION
225 ATTENDEES



STEERING COMMITTEE
34 MEMBERS
4 MEETINGS
1 WEBINAR



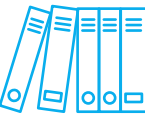
THREE SUBCOMMITTEES
12 MEETINGS
516 ATTENDEES



SOCIAL MEDIA
OUTREACH
27,000 IMPRESSIONS



PARTNER BRIEFINGS
102 BRIEFINGS WITH MORE
THAN 4,150 ATTENDEES



FDOT, PARTNER, &
OTHER STATE PLANS
MORE THAN 75
PLANS REVIEWED



SURVEYS
4 ACTIVE SURVEYS
WITH MORE THAN
1,750 RESPONSES

Note: Information current as of 4/08/20.
Some individuals participated in more than one event.

WHAT MATTERS MOST? > OUR GOALS

The FTP Vision Element reaffirms the goals of the previous FTP, with refinements to reflect changing emphases of partners and customers statewide:



SAFETY AND SECURITY FOR FLORIDA'S RESIDENTS, VISITORS, AND BUSINESSES

Florida will put every effort toward achieving **zero fatalities** and serious injuries related to our transportation system. This will be a primary emphasis of all modes of transportation, from driving to bicycling and walking. While the large number of roadway fatalities remains our highest priority, the FTP increasingly emphasizes safety, security, and reduction of risks across all modes.



AGILE, RESILIENT, AND QUALITY INFRASTRUCTURE

Florida's emphasis continues to expand from maintaining existing infrastructure to providing **agile and resilient infrastructure**. Our infrastructure will adapt to changing customer needs, business models, mobility options, technologies, and energy sources. Our infrastructure will be designed to withstand and recover from potential risks such as extreme weather events and climate trends. Our definition of infrastructure also is broader – it's not just concrete and steel, but also the communications backbone, sensors, and other technologies that enable the system to function.



CONNECTED, EFFICIENT, AND RELIABLE MOBILITY FOR PEOPLE AND FREIGHT

Florida will provide **reliable travel times** across all modes of transportation. We will work together to alleviate bottlenecks on highways, at curbs, and in queues at hubs and terminals; manage responses to crashes, special events, and other disruptions so the system returns to normal quickly; get real-time information out to customers so they can adapt travel to avoid unexpected delays; and make regulatory processes as efficient as possible for all customers.

We also will provide **seamless mobility** on end-to-end trips. Both people and freight will be able to move efficiently from origin to destination, with easy transfers between modes, services, and systems. Customer, schedule, and financial information will flow seamlessly between these systems as well. Florida's residents, visitors, and businesses will efficiently travel within and between communities, including multiple options for reliable travel between our regions and between Florida and other states and nations.



TRANSPORTATION CHOICES THAT IMPROVE EQUITY AND ACCESSIBILITY

We've learned that the range of choices is more than just cars, bicycles, and buses. As innovation empowers new options like e-scooters and air taxis, we've learned it is not enough to simply provide more choices. Instead, we need to provide **universal accessibility** to all Floridians; safe, affordable, and convenient ways for everyone to access jobs, education, and health care, regardless of age or ability.

WHAT MATTERS MOST? > OUR GOALS



TRANSPORTATION SOLUTIONS THAT STRENGTHEN FLORIDA'S ECONOMY

Our transportation system will be designed to connect workers to jobs, visitors to attractions, and businesses to suppliers, consumers, and partners. We will provide **connectivity for workforce, visitors, and commerce** at all levels, global to local, to support an increasingly diverse economy. Florida's supply chain needs world-class air, sea, and space gateways with service to global markets; it also needs e-commerce centers and delivery networks able to bring highly precise shipments to individual customers daily. Our workers and visitors also need safe, affordable, and reliable ways to travel to, from, and through Florida.



TRANSPORTATION SOLUTIONS THAT ENHANCE FLORIDA'S COMMUNITIES

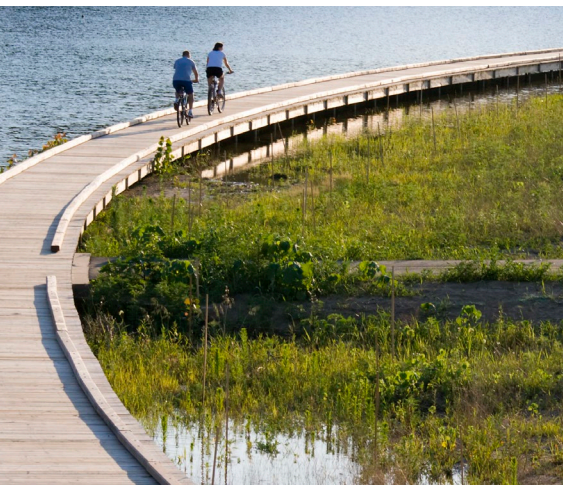
Our transportation system will **strengthen diverse communities** across the state, from large cities to small towns and rural areas. Prior plans emphasized the importance of supporting quality places. This vision reminds us that our ultimate measure of success is how well we reflect the values and preferences of the millions of Floridians our system serves each day.



TRANSPORTATION SYSTEMS THAT ENHANCE FLORIDA'S ENVIRONMENT

The sustainability of our environment and natural resources will be at the forefront of our decisions. This means more than just conserving water and energy, reducing emissions, and avoiding and mitigating impacts on conservation lands. It means proactively taking steps to **enhance and restore natural systems**, so they are preserved for future generations.

These seven goals are the building blocks of the FTP. They are interrelated and best accomplished as a set. Enhancing safety cannot be fully achieved without reducing congestion and providing safe alternatives to driving, such as transit, bicycling, and walking. Improving our transportation choices begins with ensuring they are safe and reliable. Enhancing our communities makes them more attractive to workers, visitors, and businesses. Making progress toward all goals moves us toward our vision. The transportation system of the future is robust, resilient, and responsive to the needs of a diverse state.



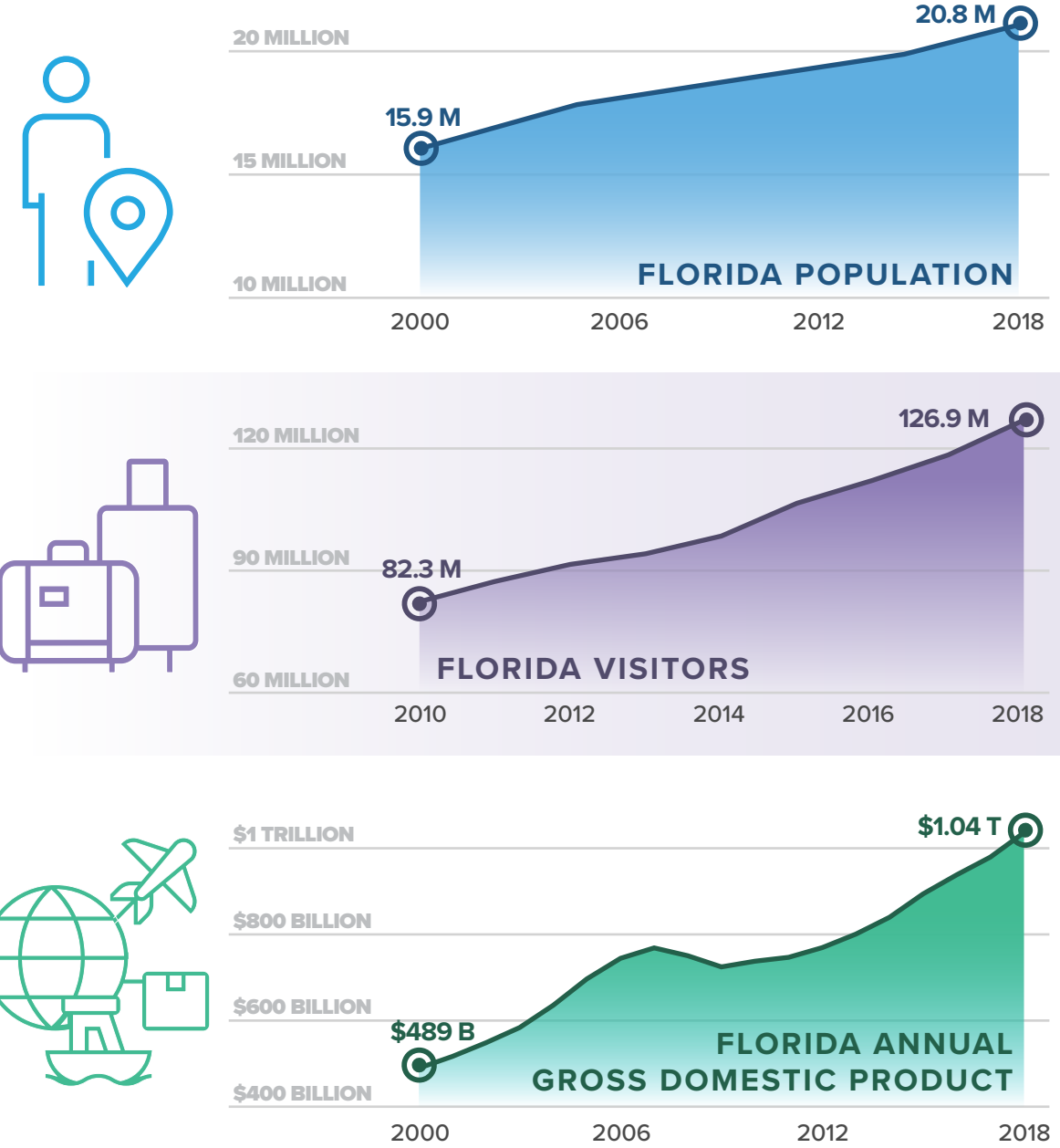
WHERE ARE WE NOW? > OUR PRESENT

Multiple forces are converging to reshape the future of Florida and the transportation needs and preferences of our residents, visitors, and businesses:

- Growth of Florida's population and economy*
- Diversity of Florida's population*
- Development patterns and preferences in both urban and rural areas*
- Global integration of Florida's economy*
- Innovation, technologies, and business practices*
- Risks and uncertainties across many aspects of our society*

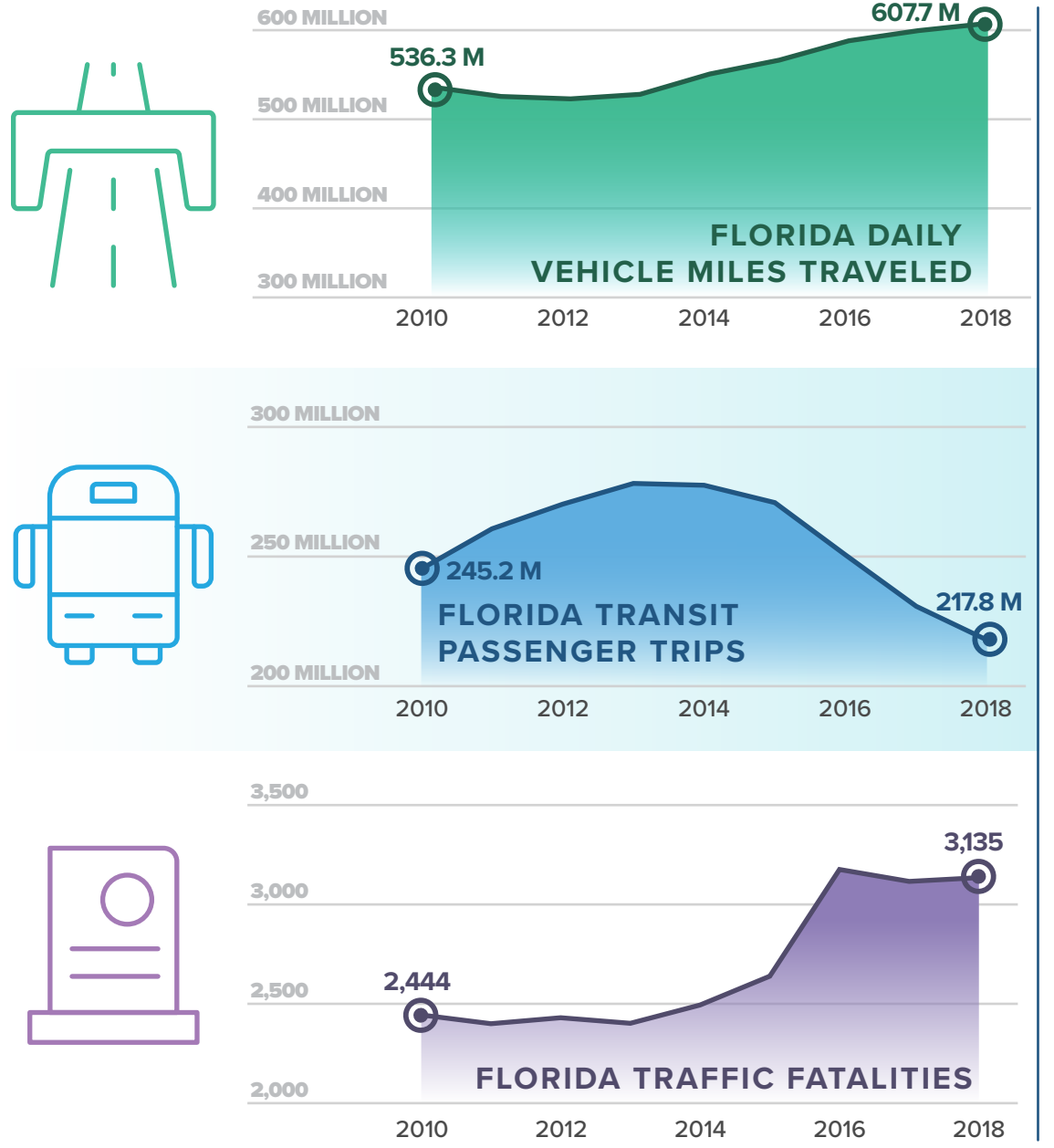
Many of these trends have been occurring for decades and are likely to continue over the next several decades. The disruption we are facing in 2020 related to COVID-19 is unprecedented and reflects the growing risks facing our state in a more globally integrated and diverse economy. Although we must be prepared for these types of external shocks, we also must prepare for the range of possibilities the state may face in 2045 and beyond.

These trends and potential disruptions may reshape how, when, where, and how often we travel. The trends influence how we will work to achieve our vision, but they do not change our vision. Our goals remain consistent across all potential future changes and disruptions we may face.

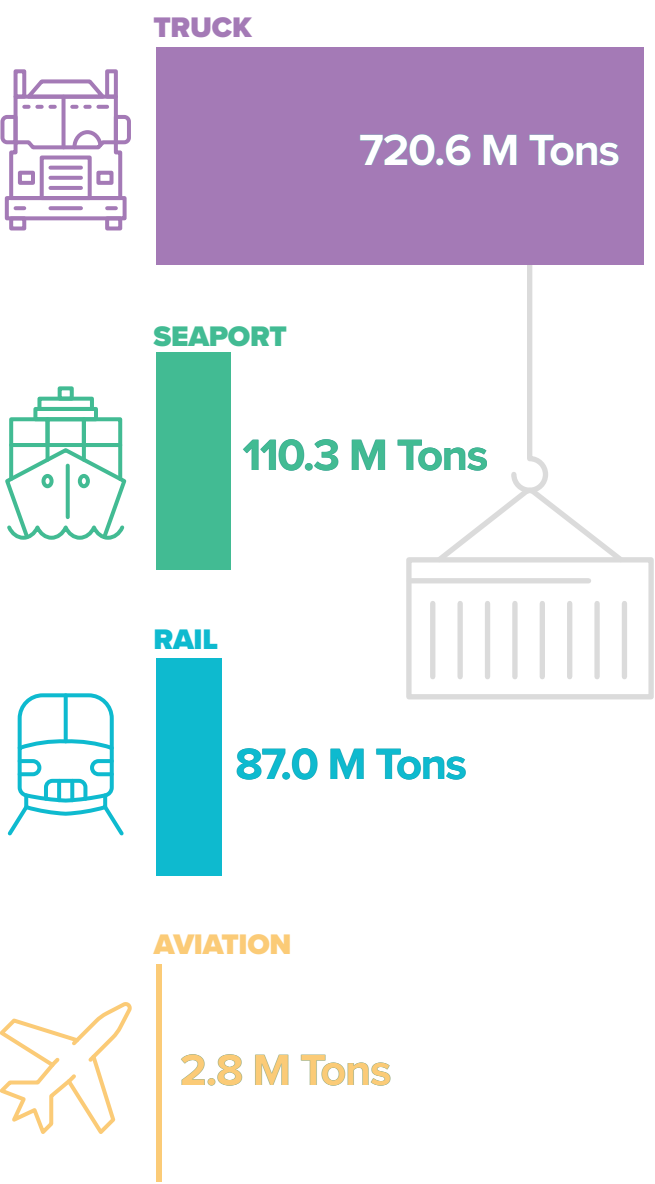


Graphs are based on the best available data.
A full list of sources can be found at FloridaTransportationPlan.com/VE2020Sources.pdf

WHERE ARE WE NOW? > OUR PRESENT



FLORIDA FREIGHT VOLUME (2018)



WHERE ARE WE GOING? > **GROWTH**

Florida’s population and economy will continue to grow. That’s not news for any of us who live here – but the magnitude of the gain anticipated through 2045 and beyond is impressive.

Prior to COVID-19, Florida’s population was projected to increase by 700 residents per day over the next 25 years, roughly equivalent to adding the population of St. Petersburg to the state each year. The highest growth rate is expected in the next several years as the baby boomer generation retires.

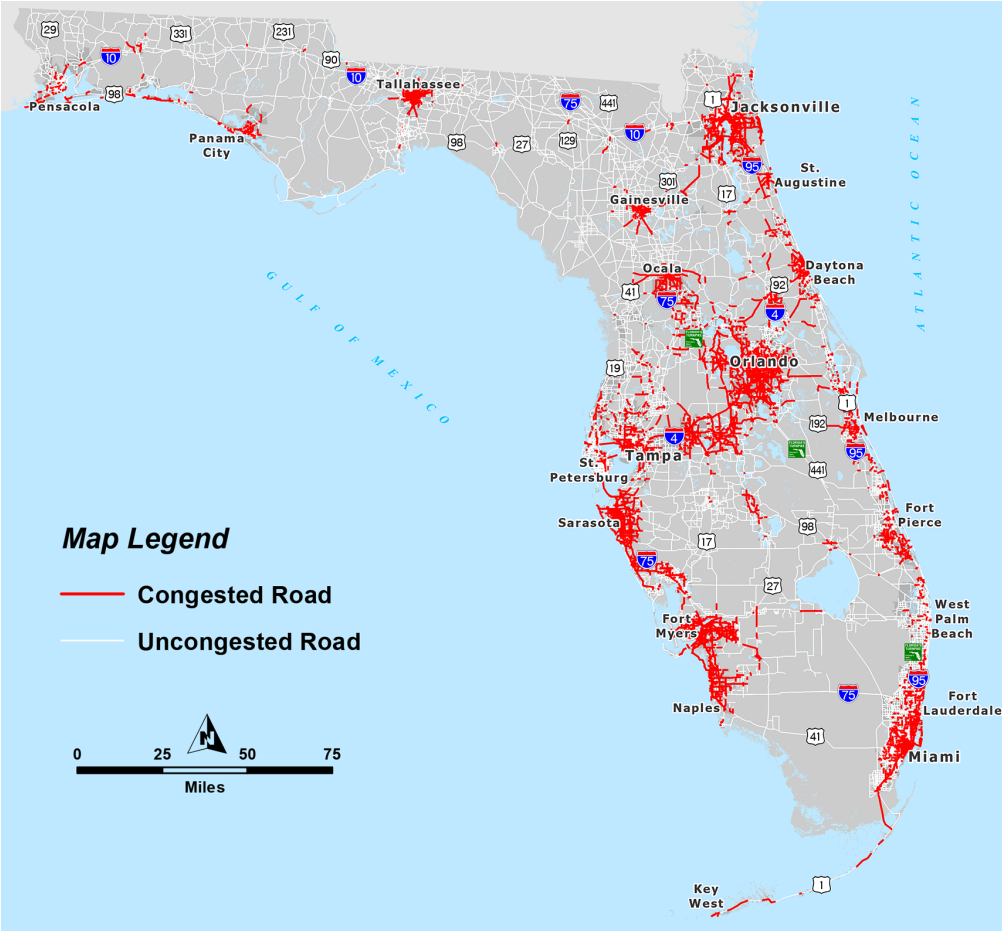
As the number of residents and visitors continues to increase, so too will demand for moving both people and freight. In fact, Florida’s vehicle miles traveled is increasing at an even faster rate than our economy or population.

IMPLICATIONS

Potential need for additional capacity of transportation system to support significant growth in demand for moving people and freight.

Potential for more bottlenecks, more crashes, and more challenges getting people and goods to destinations efficiently.

CONGESTED FACILITIES BY 2040 (if pre-2020 trends continue)



WHERE ARE WE GOING? > **DIVERSITY**

Florida’s population is becoming more diverse as it grows, extending trends from the past few decades. As a state, we continue to get older, although there are some counties where the median age remains low and the number of college and post-college-age residents is high. We also are becoming more ethnically and racially diverse. One of every five Floridians is foreign-born today.

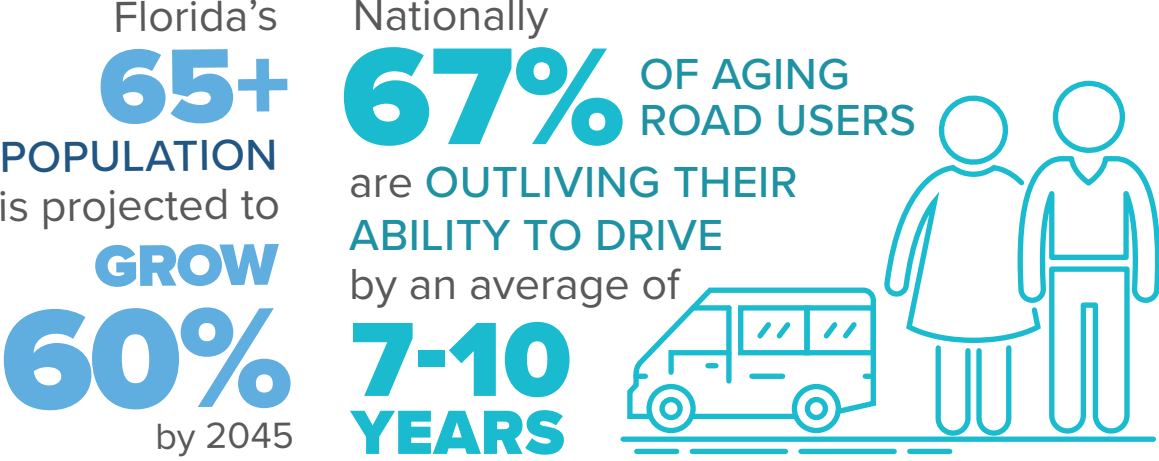
Some of the most significant differences facing Florida relate to our prosperity and quality of life. About 14 percent of our population lives below the poverty line, with many more residents living paycheck to paycheck. Increasing numbers of Floridians face disabilities or chronic health conditions. These groups are often most heavily impacted by economic cycles and fluctuations. In March and April 2020, for example, thousands of Floridians lost their jobs as the state’s businesses and economy were disrupted by impacts of COVID-19. Transportation can provide a path to prosperity by connecting people to jobs, education, health care, and other resources.

IMPLICATIONS

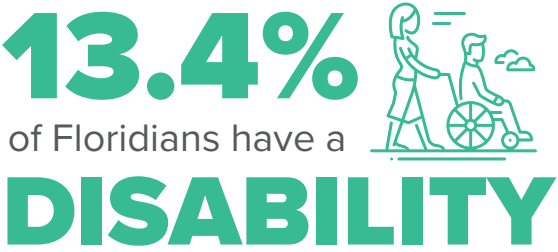
Need for a range of transportation options to support a diverse population, especially an aging population preparing to transition from driving.

Increasing emphasis on affordability, convenience, and personal safety.

Need to accommodate residents with disabilities, limited English proficiency, or limited access to smartphones, broadband, and other technologies.



INCREASING DIVERSITY IN FLORIDA (PROJECTED 2045 GROWTH BY RACE/ETHNICITY)



TRANSPORTATION is the **THIRD HIGHEST HOUSEHOLD COST** for a family of four in Florida

WHERE ARE WE GOING? > **DEVELOPMENT**

Florida is home to a diverse mix of urban and rural areas. Recent population growth tends to focus in outlying counties of existing metropolitan areas and along transportation corridors with good access to jobs centers, with 88 percent of Florida’s population living in urban areas.

Our largest urban areas – Southeast Florida, Tampa Bay, Orlando, Tampa, and Jacksonville – are continuing to grow, with more emphasis on infill and mixed-used development. These areas often need multimodal transportation solutions to supplement already built-out roadway networks.

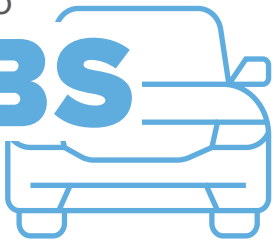
A second group of emerging areas – like Fort Myers/ Naples, Ocala/The Villages, and Tallahassee – typically developed around major roadways. They traditionally rely on the car to get people to jobs and services and, in some cases, are seeking to expand modal alternatives.

Florida’s rural areas range from fast-growing areas on the fringes of existing urban areas to regional jobs centers to economically distressed communities. Transportation could support increased economic activity and better access to jobs.

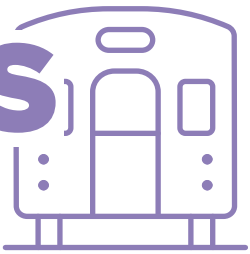
IMPLICATIONS

- Need for flexible solutions to address unique values and needs of each community while supporting statewide goals.
- Importance of effective and ongoing coordination of transportation and development decisions.

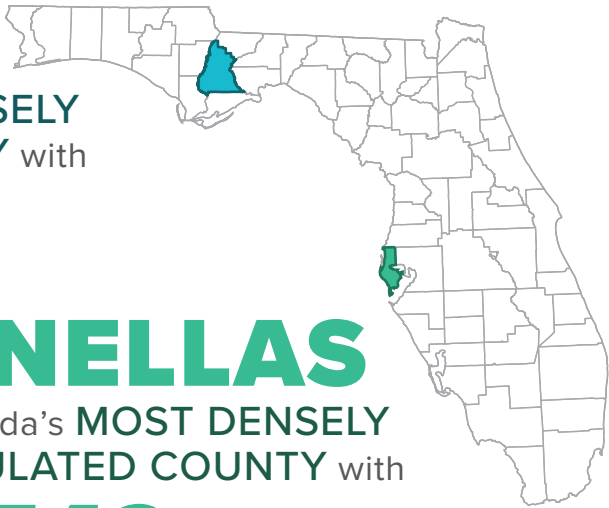
The average Florida worker has access to
617,632 JOBS
within a
40 MINUTE DRIVE



but only
18,249 JOBS
within a
40 MINUTE TRANSIT TRIP



LIBERTY
is Florida’s **LEAST DENSELY POPULATED COUNTY** with
11 PEOPLE PER SQUARE MILE



PINELLAS
is Florida’s **MOST DENSELY POPULATED COUNTY** with
3,542 PEOPLE PER SQUARE MILE

WHERE ARE WE GOING? > **INNOVATION**

Technology is continually evolving and changing the way people interact with each other, work, do business, and travel. Advancements in technology and communications, combined with emerging business practices, enable same-day delivery of groceries and consumer products and allow more of us than ever to work, learn, and receive health care remotely. Businesses face the challenge of managing ever-more complex and precise supply chains, producing highly customized goods and speeding them to consumers in a breathtakingly short period of time.

Private enterprises are at the forefront of new mobility options and services, ranging from shared vehicles to micromobility, from automated vehicles to alternative fuels. Public/private partnerships are advancing new infrastructure and services, sharing risk and reward.

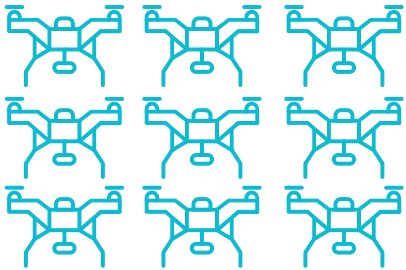
IMPLICATIONS

- Potential for dramatic increases in safety, mobility, and accessibility – including potential for significantly increasing travel demand by making it easier for people to travel.
- Potential for an extended transition period with both existing and emerging technologies using the transportation system.
- Significant transition period needed in regulatory structures, planning processes, workforce skills, and revenue sources as we adapt to new technologies.

E-COMMERCE
accounts for
64% of all U.S. **MANUFACTURING SHIPMENTS**



Nationally, more than
ONE-HALF
OF ALL JOBS COULD BE
AUTOMATED TODAY
using current technologies



In 2018,
32,000 **ELECTRIC VEHICLES**
were sold in Florida
making up **2.41%** of **TOTAL VEHICLE SALES**

The cumulative number of
GLOBAL SHARED VEHICLE TRIPS
INCREASED TENFOLD
in the last **5 YEARS**

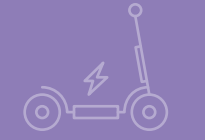


In **2018**, there were
84.5 MILLION
total trips taken nationally with
SHARED MICROMOBILITY OPTIONS

39.5 million
pedal bicycle
trips



38.5 million
e-scooter
trips



6.5 million
e-bike trips



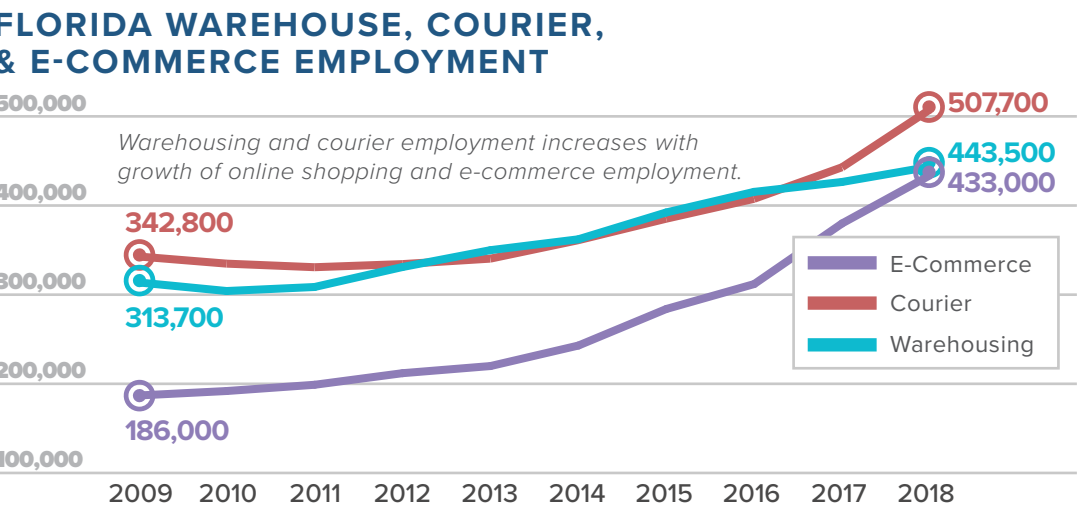
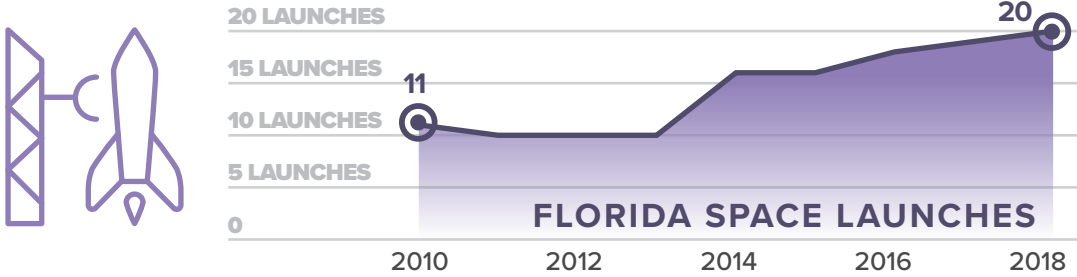
WHERE ARE WE GOING? > GLOBAL INTEGRATION

Florida’s economy has long relied on efficient and reliable connections to national and global markets to bring visitors to the Sunshine State; to sell Florida agriculture, mining, and manufactured goods around the globe; and to allow the state’s large military presence to respond to crises around the world.

We expect Florida’s economy to become even more globally integrated in the coming decades. Forecasts developed in early 2020 projected the number of visitors to the state could grow 43 percent by 2029; with 16 million international visitors a year, Florida ranks second among the states. With 15 deepwater ports and nine commercial service airports currently offering international service, Florida remains one of the nation’s leading gateways for trade to and from Latin America and the Caribbean – and is diversifying its trading partners to include Asian and African markets as well. Florida’s medical, financial, legal, and engineering industries increasingly are selling their services worldwide. The Cape Canaveral Spaceport remains the world’s most capable gateway to space, particularly in growing commercial markets. All these activities rely on a multimodal transportation system that can efficiently move both people and goods to, from, and through Florida.

IMPLICATIONS

- Increasing need for connectivity to global markets for moving people and freight.
- Need to balance statewide and interregional connectivity with unique vision and values of communities along major corridors.
- Increasing exposure to global events and risks related to the free flow of goods and people, such as human trafficking, cybersecurity, and the spread of infectious diseases and invasive species.



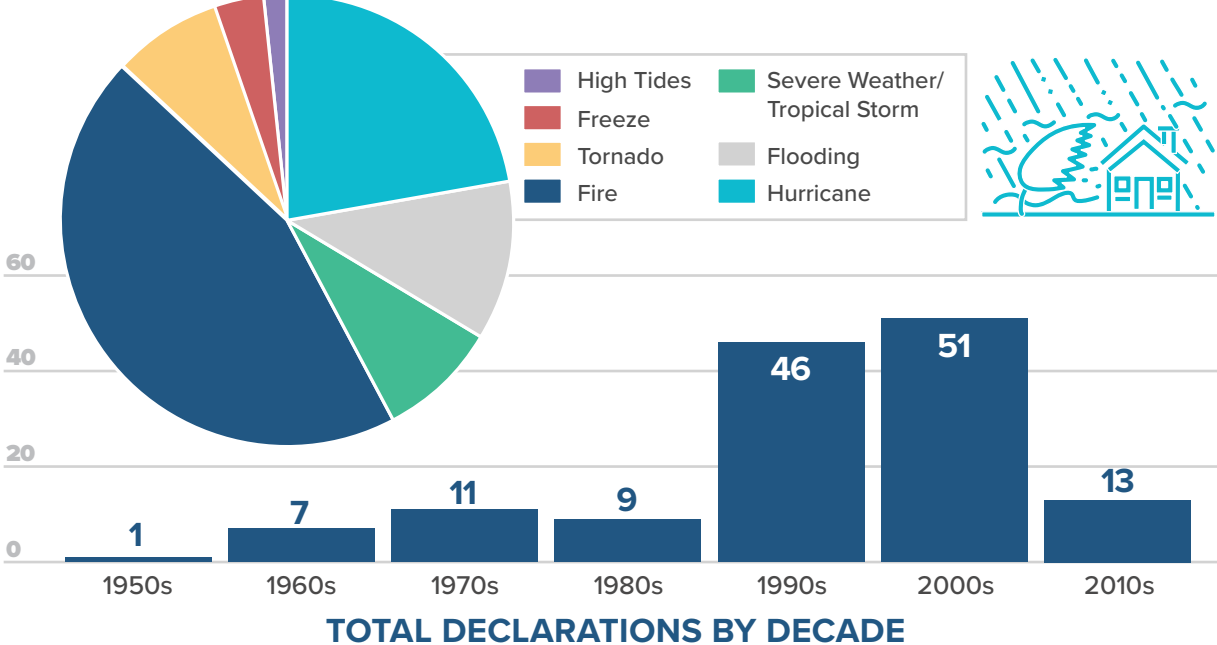
WHERE ARE WE GOING? > RISKS & DISRUPTIONS

Extreme weather, like hurricanes, and the threat of rising sea levels and changing climate are often cited among the greatest risks to Florida’s infrastructure and communities. Florida’s economy is likely to experience multiple business cycles during the next 25 years and these economic fluctuations will impact the wellbeing of Florida’s communities. New and emerging technologies offer the potential for a safer, more efficient transportation system; more connectivity globally and locally; and streamlined business practices. However, increased reliance on technology brings other challenges to the forefront like cybersecurity and data privacy and in a global economy we could be more susceptible to external shocks and events, such as disruptions in global trade. How our transportation system responds to these types of risks and disruptors could determine the future safety and prosperity of Florida’s residents, visitors, and businesses. A transportation system that is adaptive in the face of risk and resilient to potential hazards helps the state make wiser investment decisions and ensures more reliable mobility.

IMPLICATIONS

- Growing importance of effective emergency response and recovery strategies as Florida continues to grow and as development and technologies change.
- Growing need to redesign and adapt infrastructure to make our communities stronger and more resilient.
- Determining how and where to invest given uncertainty about the magnitude and likelihood of risks.
- Need for a more agile way of planning and managing Florida’s transportation system.

DISASTER DECLARATIONS IN FLORIDA



HURRICANE STORM SURGE



OUR VISION > FLORIDA'S TRANSPORTATION FUTURE

Our customer needs and preferences are changing. The possibilities enabled by technology are multiplying. The risks and uncertainties we face, from pandemics to economic cycles to climate change, are growing. But our vision is clear.

Our vision for Florida in 2045 is for a robust transportation system to meet the needs of a dynamic state by accomplishing the seven goals of the FTP. If we work toward these goals as a set, our transportation system in 2045 and beyond will have zero fatalities, reliable travel times, seamless mobility, and universal accessibility.

This vision is bold, and it transforms how we plan, design, build, maintain, operate, manage, and fund our transportation system. This vision embraces a more proactive approach to the future of transportation in Florida.

GLOBAL LEADERSHIP IN THE FUTURE OF MOBILITY

We envision Florida as a global leader in the transformation of transportation over the next few decades. From autonomous vehicles to commercial space travel, from urban air mobility to advanced logistics, from big data to artificial intelligence, Florida is positioned to help shape the future of mobility not only in our state, but also around the globe. Maintaining our focus on innovation will help Florida remain an early adopter of new technologies and add value to our economy.

FORWARD-LOOKING PLANNING FOR HOW TRANSPORTATION CONTRIBUTES TO A MORE COMPETITIVE, RESILIENT, AND SUSTAINABLE STATE

In the past, transportation decisions reacted to economic growth and development, and too often they had unforeseen consequences on our built and natural environment. We envision a future where effective transportation planning, in collaboration with land use, economic, and environmental planning, creates a stronger economy and enhances communities and the environment across the state.

SUSTAINABLE TRANSPORTATION PARTNERSHIPS AND INVESTMENTS

Finally, we recognize that all other aspects of our vision can be achieved only if we maintain strong partnerships among public agencies as well between public and private organizations. This includes efficient and effective decision making at the state, regional, and local levels. It also includes sustainable funding for transportation investment across all partners, including approaches for addressing the decline of the value of our largest revenue source, fuel taxes. Our investment is more than dollars. It's also in our people, and we must redouble efforts to develop, attract, and retain a skilled transportation workforce to deliver the transportation system of the 21st century.



OUR VISION > FLORIDA'S TRANSPORTATION FUTURE



Desired outcomes in 2045 identified by FTP Steering Committee members in November 2019.

OUR VISION > WHAT'S NEXT?

The FTP includes four elements:

- The **Vision Element** (this document) defines our long-term transportation vision and goals for the next 25 years.
- The **Policy Element** describes how we will accomplish the vision and goals. It defines objectives and strategies to guide transportation partners statewide during the next 25 years.
- The **Implementation Element** details how we will work toward implementation during the next five years. It details specific short-term actions, roles, and timelines. It also outlines how we will track progress toward accomplishing our vision and goals.
- The **Performance Element** reports how our system performs on key measures of safety, asset condition, and mobility. This initial report emphasizes federally required measures tracked by FDOT; future versions may expand to address a broader view of performance.

Sources available at:
FloridaTransportationPlan.com/VE2020Sources.pdf

FDOT will work with the FTP Steering Committee, supplemented by input from other partners and the public, to develop the remaining elements of the FTP building on this Vision Element. Key issues that will be considered in development of objectives and strategies for the Policy Element include:

- Achieving the overarching goal of zero fatalities on the transportation system;
- Leveraging emerging technologies and business practices, such as automated, connected, electric, and shared vehicles, to improve safety, mobility, and accessibility;
- Addressing a full range of risks, from extreme weather to economic cycles, pandemics, and cybersecurity, to ensure the transportation system is robust and resilient;
- Supporting increasing demand for statewide and interregional flows of people and freight as Florida’s regions become more connected and more integrated with the global economy; and
- Addressing unique regional and local opportunities and challenges while also accomplishing statewide goals.

The FTP vision and goals can be accomplished through a combination of strategic investments, partner collaboration, customer- and performance-driven decision making, and ongoing research and workforce development activities. The FTP Policy Element will define specific strategies in these areas to work toward the FTP vision and goals.

FTP STEERING COMMITTEE

Stacy Miller (Current Chair)
Tom Byron (Past Chair)
Florida Department of Transportation

Paul Owens
1000 Friends of Florida

Laura Cantwell
AARP Florida

Andra Cornelius
CareerSource Florida

Jamie Christian
Federal Highway Administration

Michael Stewart
Florida Airports Council

The Honorable Doug Smith
Florida Association of Counties

Chris Emmanuel
Florida Chamber of Commerce

David Darm
Florida Commission for the Transportation Disadvantaged

Eric Frey
Florida Council of 100

Elizabeth Medina
Florida Defense Alliance

Ryan Fierst
Florida Department of Economic Opportunity

James Stansbury
Florida Department of Economic Opportunity

Chris Stahl
Florida Department of Environmental Protection

Jennifer Johnson
Florida Department of Health

Lt. Col. Troy Thompson
Florida Department of Highway Safety and Motor Vehicles

The Honorable Matthew Surrency
Florida League of Cities

Doug Wheeler
Florida Ports Council

Karen Deigl
Florida Public Transportation Association

Craig Camuso
Florida Railroad Association

Ananth Prasad
Florida Transportation Builders Association

Teresa Sarnoff / David Genson
Florida Transportation Commission

Patricia Steed (Vice Chair)
Florida Regional Councils Association

Alix Miller
Florida Trucking Association

Sally Patrenos
Floridians for Better Transportation

The Honorable Bryan Caletka
Metropolitan Planning Organization Advisory Council

Greg Slay
Metropolitan Planning Organization Advisory Council

Ken Bryan
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Chris Doolin
Small County Coalition

Mark Bontrager
Space Florida

The Honorable Sean Parks
Transportation & Expressway Authority Membership of Florida (TEAM Florida)

Janet Bowman
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John Renne
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FLORIDA

Transportation Plan



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