FLORIDA TRANSPORTATION TRENDS & CONDITIONS

2015

The Mission of the Florida Department of Transportation is to provide a safe transportation system that ensures the mobility of people and goods, enhances economic prosperity and preserves the quality of our environment and communities.

This **Florida Transportation Trends and Conditions** report is one of several products intended to assist Florida transportation policy makers, planning organizations and the general public by identifying, analyzing and disseminating information about how transportation serves and affects Florida. It is organized into four areas:

Growing demand for transportation facilities & services

Transportation system components

Impacts of the transportation system on our society

Funding associated with providing transportation

We hope you find this publication helpful. Additional information on trends and conditions regarding transportation in Florida is available at:
www.dot.state.fl.us/planning/trends

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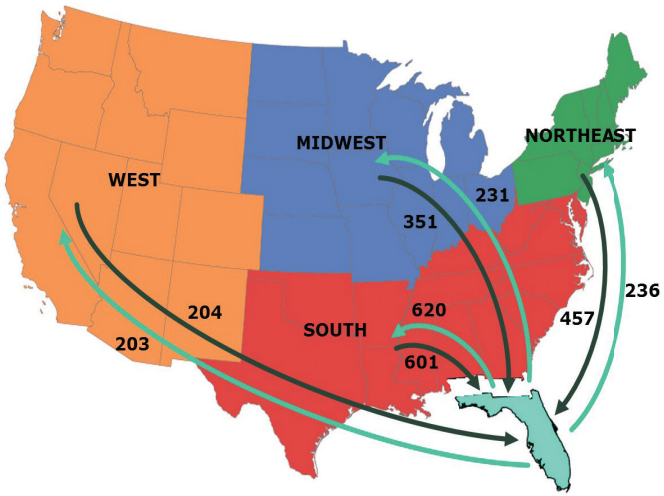
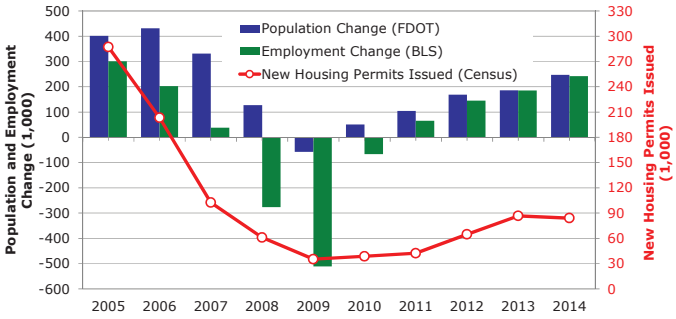
Population

Florida Domestic Migration Flow (1,000) 2012-2014



Note: Three-year totals are used.

New Housing Permits Issued per Year and Annual Change in Population and Employment

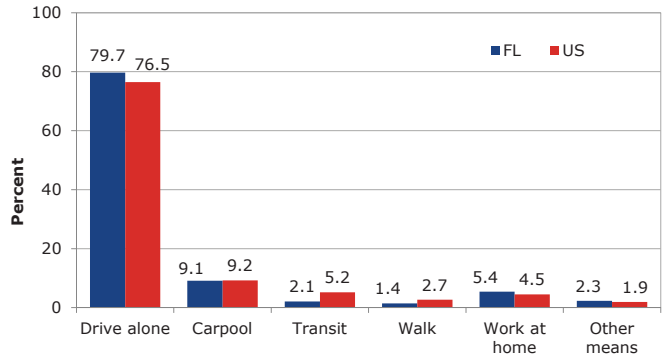


- Florida passed New York to become the 3rd most populous state in the U.S. in 2015 and is forecast to reach 20 million residents by year end.
- Between 2005 and 2014, Florida's population increased 0.95% per year and about 8.9% overall.
- From 2013 to 2014, Florida's population grew by over 293,000. Immigration and domestic migration accounted for 91% of this growth.
- Between 2010 and 2014, net domestic migration and net international immigration accounted for 84% of the state's population growth. The primary sources of Florida's domestic migration came from the Northeast and Midwest.
- From 2013 to 2014, Sumter County had the highest growth (+5.7%) followed by Walton County (+3.5%), St. John's County (+2.9%), Gulf County (+2.7%), and Osceola County (+2.5%).
- From 2013 to 2014, six counties experienced an overall loss with the greatest being Hamilton County (-1.1%), Madison County (-0.5%), and Taylor County (-0.4%).
- In 2014, Florida issued 84,075 new housing permits, about 3.1% below 2013.
- In 1970, 14.6% of Florida's population was 65 and older. This population grew to 18.6% in 2014. By 2040, it is projected to increase to 25.5%.

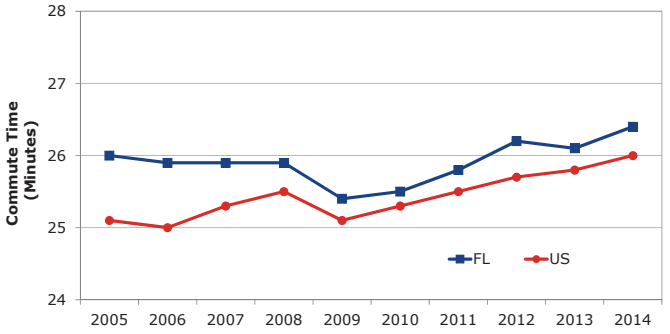
Sources: U.S. Census Bureau; Bureau of Economic and Business Research (BEBR), University of Florida; U.S. Department of Labor, Bureau of Labor Statistics (BLS); Florida Department of Transportation (FDOT)

Travel Behavior of Floridians

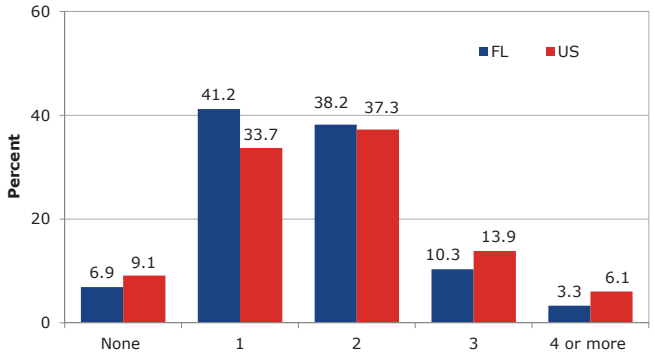
Mode of Travel for Work Commute, 2014



Mean Travel Time to Work

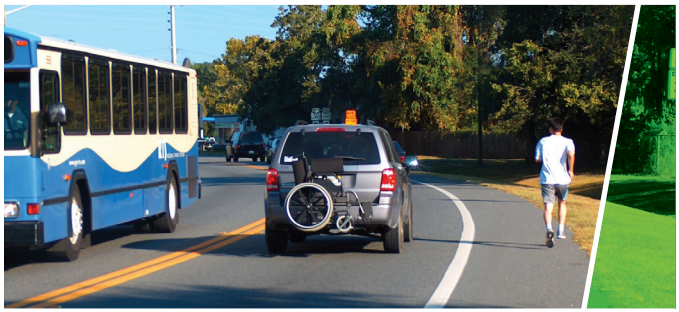


Household Vehicle Availability, 2014



The 2014 American Community Survey found:

- Nearly 90% of Floridians continued to commute to work by automobiles, a 3.1% larger share than the national average.
- In Florida, transit carried 2.1% of commuter trips. The national average was 5.2% in 2014. Both Florida and national shares remained unchanged from 2013.
- Walking commuters decreased by 0.1% in 2014 for both Florida and national totals to 1.4% and 2.7%, respectively.
- The work-at-home workforce grew from 5.1% in 2013 to 5.4% in Florida. The national share increased slightly to 4.5%.
- Average commute time increased 0.3 minutes for Florida and increased 0.2 minutes nationally.
- Over 32% (2.3 million) of Florida households have no workers. Hence, travel and location decisions are not necessarily focused on commuting. The national share was 26.9%.
- About 7%, (one half million) of Florida households have no cars, down from 7.2% in 2013. The share remains below the national level of 9.1% in 2013 and 2014. These households are dependent on other travel options.

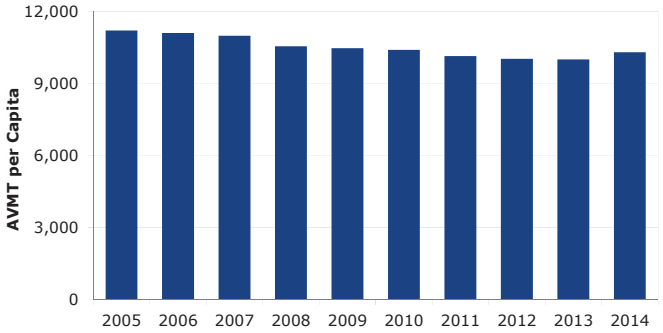


Source: U.S. Census Bureau

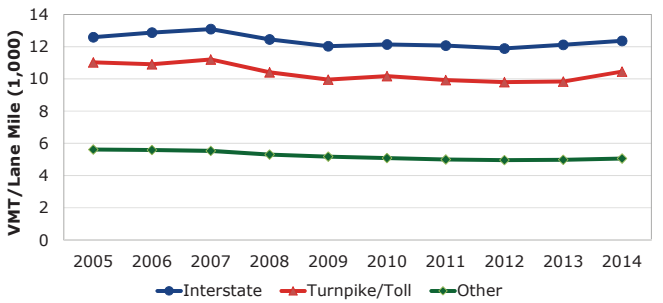
TRAVEL DEMAND

Travel Levels

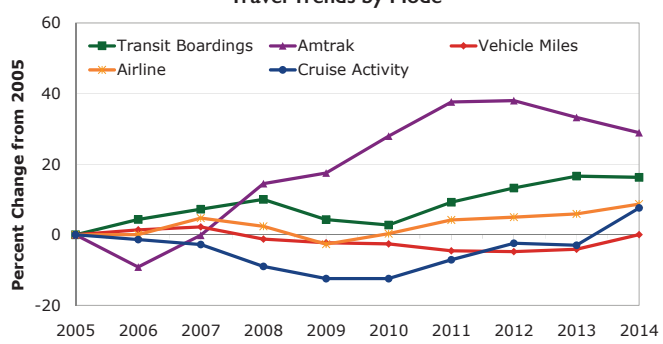
Annual Vehicle Miles Traveled (AVMT) per Capita



Average Daily VMT per Lane Mile on the Florida State Highway System



Travel Trends by Mode

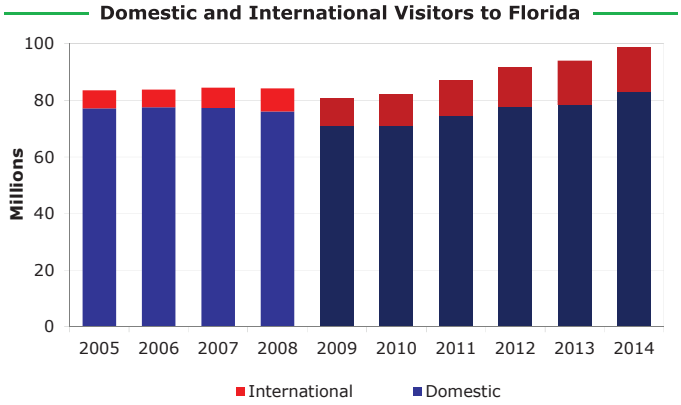


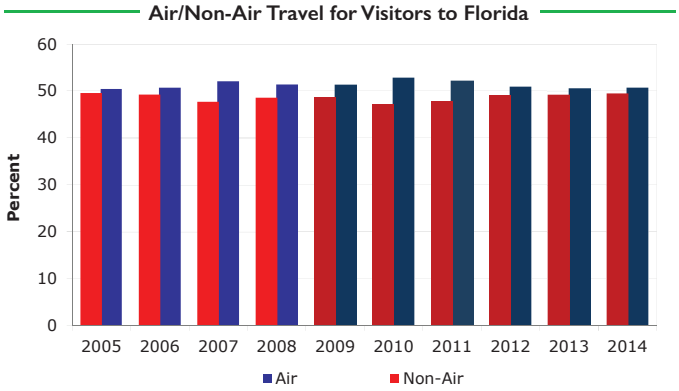
In 2014:

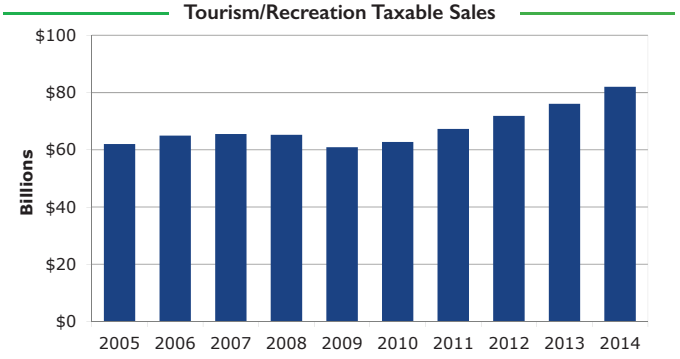
- Vehicle miles traveled (VMT) in Florida increased by 4.3% from 2013. VMT per capita increased 3.0% - the first increase in a decade.
- VMT per lane mile is an indicator of the intensity of highway use. Travel per lane mile on the State Highway System increased for the second consecutive year.
- Total licensed drivers in Florida grew by 1.3% to 15.6 million persons in 2015.
- Passenger car, truck and motorcycle registrations increased about 2.5% to 13.9 million vehicles.
- Cruise activity increased 10.5% from 2013.
- Florida airports experienced about 72.4 million enplanements, an increase of 2.8% from 2013.
- Fixed route and vanpool transit boardings decreased by 760 thousand passenger trips (0.3%) from 2013.
- Amtrak ridership was down 3.3%.

Source: FDOT; Florida Department of Highway Safety and Motor Vehicles; Amtrak; Florida Ports Council; Federal Aviation Administration (FAA); National Transit Database (NTD)
Note: Licensed drivers and vehicle registrations as of January 1, 2015.

Tourism and Travel







In 2014:

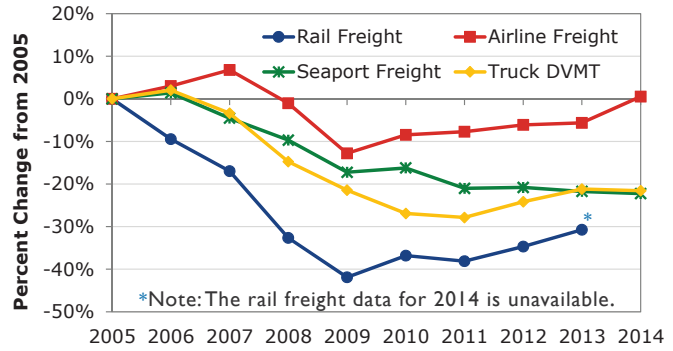
- Florida hosted 98.7 million visitor/tourists, an increase of 4.6 million or 4.9% more than in 2013.
- Domestic visitors to Florida outnumbered international visitors by 5.3 to 1.
- There were about 5 visitors to the state for every resident.
- About 51% of all visitors to Florida arrived by air.
- Taxable spending on tourism/recreation reached about $82 billion, up 7.8% from 2013.
- The tourism industry directly employed over 1.1 million persons, 4.4% more than in 2013.
- Florida hosted 15.6 million cruise revenue passengers in fiscal year (FY) 2013/2014, the majority of whom embarked/disembarked from:
  - » PortMiami with nearly 5 million passengers.
  - » Port Canaveral and Port Everglades with more than 4 million each.
  - » Port Tampa with over 880 thousand passengers.

Source: VISIT FLORIDA

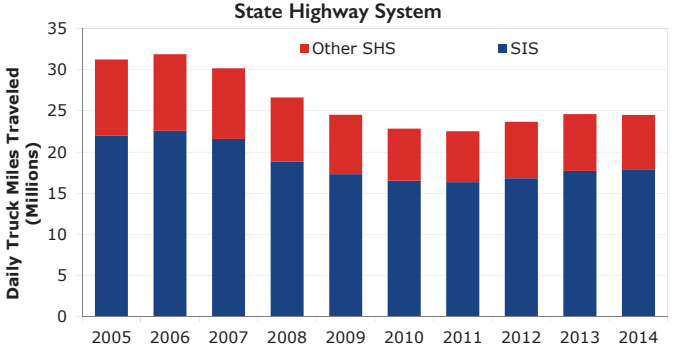
Note: Cruise passenger data reported by respective port authorities. New visitor estimation methodology used since 2009; comparisons to pre-2009 are not appropriate.

Trade and Freight Transportation

Freight Growth Trends by Mode



Truck Miles Traveled on the State Highway System



- Florida's 15 deepwater seaports and 128 public use airports handle air and ocean freight to and from the Caribbean and the Central and South Americas.
- Rail and airline freight tonnage in Florida increased from the previous year.
- Waterborne cargo in Florida increased to $86.8 billion in trade value in 2014, a 1.1% increase from 2013.
- Truck miles traveled (TMT) increased about 0.7% and accounted for 8.3% of vehicle miles of travel in 2014 on the Strategic Intermodal System (SIS).
- TMT on the entire State Highway System decreased 0.5% from 2013.
- Seaport and truck freight tonnage in Florida decreased from the previous year.
- Nationally, Florida ranks fourth in total air cargo tonnage with 2.6 million tons of annual air cargo. Of the top ten states in air cargo volume, Florida accounts for an 11.2% market share. Miami International Airport dominates with 79% of the market share among all Florida airports.
- Chemical and fertilizer minerals, mostly consisting of Phosphate rock, comprised 32.5% of total originating rail freight tonnage in 2013. Phosphate rock is used mainly in the production of fertilizers and animal nutrient supplements.

Sources: FDOT; Association of American Railroads; USDOT Bureau of Transportation Statistics; Florida Ports Council

Strategic Intermodal System

- The Strategic Intermodal System (SIS) is a statewide network of high-priority transportation facilities where focusing investments produces the greatest impact on commerce and economic competitiveness. The following table summarizes the SIS facilities.

Strategic Intermodal System Facilities

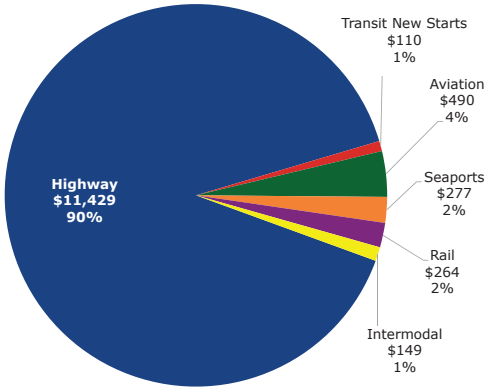
Facility Type	SIS
Commercial service airports	17
General aviation reliever airports	2
Spaceports	2
Deepwater seaports	12
Freight terminals	8
Intermodal Logistics Center	1
Urban fixed guideway transit stations/hubs	36
Interregional passenger stations/hubs	20
Rail corridors	2,325 mi
Waterway corridors	1,986 mi
Highway corridors	4,699 mi
Connectors for all modes	548 mi

- The SIS facilities account for 17 of Florida's 20 commercial airports, and carry 98% of all passenger enplanements and 100% of the air cargo tonnage.
- The 12 SIS seaports serve 95% of all cruise passengers and transport 100% of all waterborne freight tonnage in the state.
- Of the state's 12,116 miles of State Highway System, 4,699 miles are designated as the SIS, carrying 56% of all vehicle miles and 73% of all truck miles in Florida.

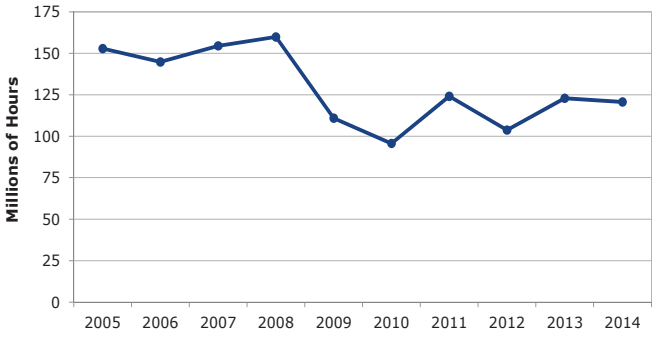
Note: Data as of October 2015.

- The five year work program (2016-2020) allocated $12.7 billion towards SIS capacity improvements.
- Annual person hours of delay on the SIS declined during the recession and have remained generally stable since, now 21% below 2005 levels.

SIS Capacity Improvement, FY 2016-2020 ($Millions)



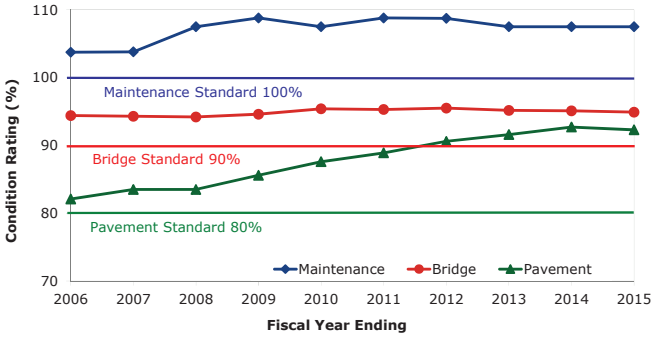
Annual Person Hours of Delay on SIS



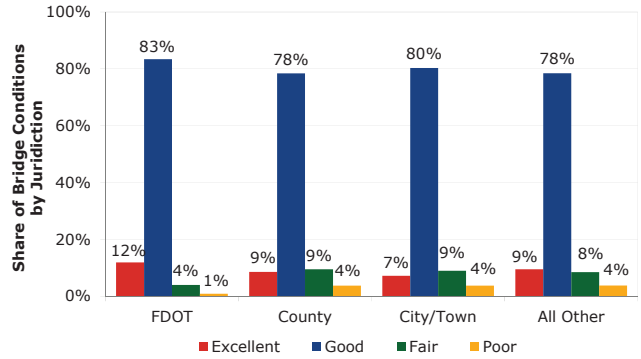
Source: FDOT

Roadway System

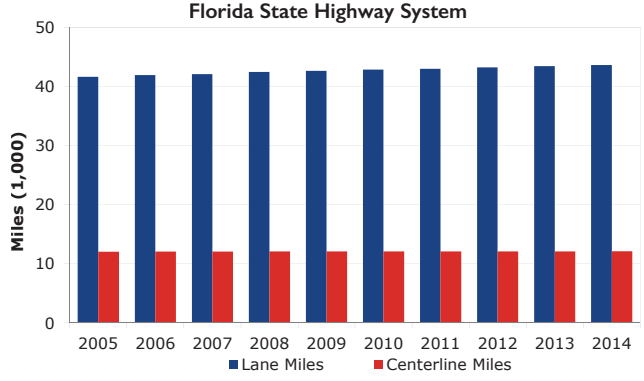
State Highway System Condition Rating



FY 2015 Bridge Condition by Maintenance Responsibility



Lane Miles and Centerline Miles on the Florida State Highway System

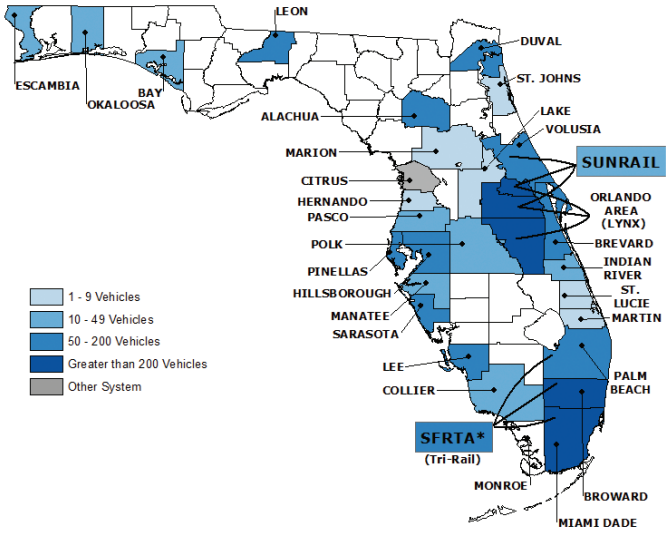


- Florida has 122,392 centerline miles of public roads, up 304 miles since 2013. Lane miles on the Florida State Highway System (SHS) grew less than 1% since 2013.
- The SHS is 10% of the entire Florida roadway network, but it carries 54% of all daily traffic.
- Urban and rural roads functionally classified as "local" comprise 75% of the public road centerline miles.
- Collector and other arterial roads constitute 23.3% of urban and rural roads with Interstate, Turnpike and Urban Freeways constituting less than 2% of centerline miles.
- Over 95% (6,489) of the state-maintained bridges are in excellent or good condition.
- Statutorily required maintenance standards, bridge standards, and pavement standards, are all being exceeded.
- FDOT earned the Grand Prize (PortMiami Tunnel) and the People's Choice (I-595 Corridor Improvements) award in the 2015 America's Transportation Awards competition hosted by the American Association of State Highway and Transportation Officials (AASHTO), AAA and the U.S. Chamber of Commerce.

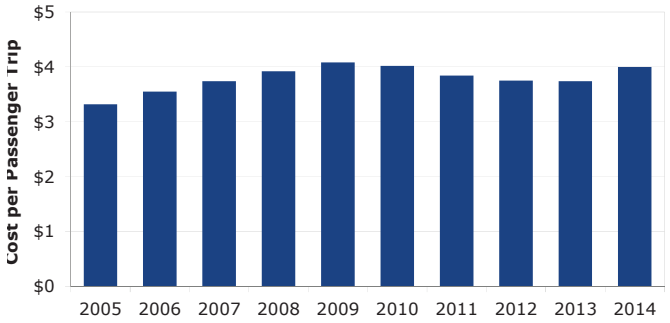
Source: FDOT

Transit Systems

2014 Fixed Route Vehicles in Operation



Florida Fixed Route Transit and Vanpool Operating Expense Per Passenger Trip

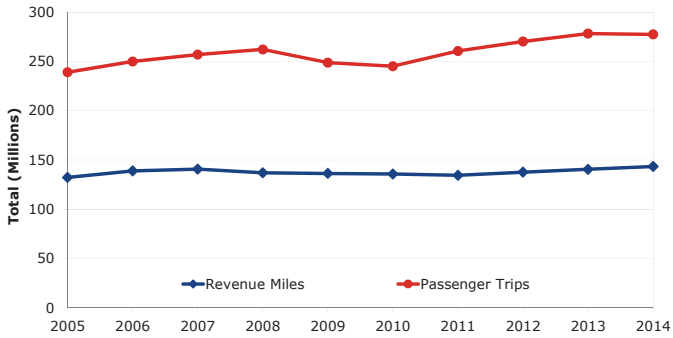


Note: Peak vehicles represents the greatest number of transit vehicles in operation at one time. Citrus County has begun transit service and data will be reported in future years.

In 2014, Florida had 31 urban fixed route transit systems

- Passenger boardings on fixed route and vanpool services were over 277 million in 2014, a decrease of 0.3% from 2013. Seven Florida vanpool agencies reported over 1.3 million total passenger trips.
- Revenue miles of transit service increased 2.1% in 2014.
- The operating expense per passenger trip increased 7% from 2013.
- In 2014, Miami-Dade Transit carried 615,000 less passengers than in 2013, yet still accounted for 40% of total statewide ridership.
- Roughly 79% of Florida's population resides within three quarters of a mile of a fixed route transit service.

Florida Fixed Route Transit and Vanpool Service



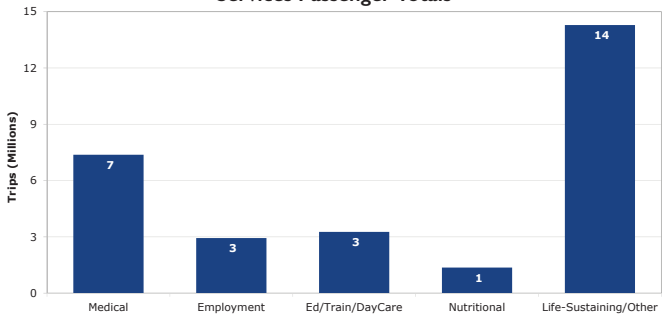
Source: Federal Transit Administration, National Transit Database (NTD)

Transportation Disadvantaged Services

In 2014:

- Florida's Transportation Disadvantaged (TD) Program coordinated and provided over 29.2 million trips to 64,021 unduplicated passengers. A change in allocating trips for monthly and weekly fixed route bus passes has resulted in a decrease of over 20 million trips from 2013.
- Fixed route transit services provided 16.6 million TD Program trips. There were 169,412 unmet TD trip requests, a decrease of 10% from 2013.
- Of the trips provided by the TD Program, 25% were for medical purposes, 10% for employment purposes, 11% for education/training, 5% for nutrition, and 49% for life-sustaining/other services.
- Florida's residents 60 and older account for 29% of TD trips, children make up 5%, low-income persons make up 13%, disabled persons account for 9%, low income disabled persons account for 8%, and 36% are in the other category.

Florida Transportation Disadvantaged Services Passenger Totals



Source: Florida Commission for the Transportation Disadvantaged

Walking and Bicycle Facilities and Travel

- Of the 9,896 non-limited access centerline miles on the State Highway System (SHS), 74% had bicycle facilities (7,282). For the 5,148 urban non-limited access centerline miles on the SHS, 64% had pedestrian facilities (3,276) in 2014. Pedestrian and bicycle facilities are inclusive of sidewalks, bike paths, bike lanes, and shared roadways.
- The seven largest counties have 21% of the urban bicycle facilities and 41% of the urban pedestrian facilities.
- Nationally, 4 million commuters reported walking as their primary mode choice to work, a 0.3% increase from 2013. In Florida, 124,000 commuters walked to work, which constitutes a 2.5% decrease from 2013.
- Over 904,000 U.S. commuters and 64,000 Florida commuters reported biking as their primary mode of travel to work, a 2.5% and 10.4% increase from 2013, respectively.
- Bikes-on-bus usage has generally grown in Florida. Since 2010, PSTA and HART have had a fluctuating trend while StarMetro has experienced growth of 15%. JTA has grown 43% in the last three years.

Florida Monthly Bikes-on-Bus Boardings

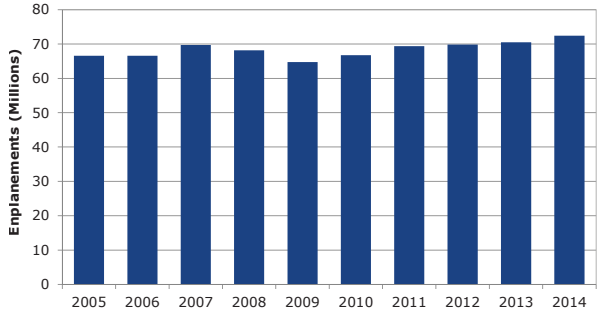
Agency	2010	2011	2012	2013	2014
PSTA, St. Petersburg	31,178	30,118	31,358	33,137	34,008
HART, Tampa	18,213	19,354	18,880	18,706	19,456
JTA, Jacksonville	N/A	N/A	11,718	13,336	16,704
StarMetro, Tallahassee	2,196	2,325	2,877	2,652	2,459

Sources: FDOT; U.S. Census Bureau; individual transit agencies

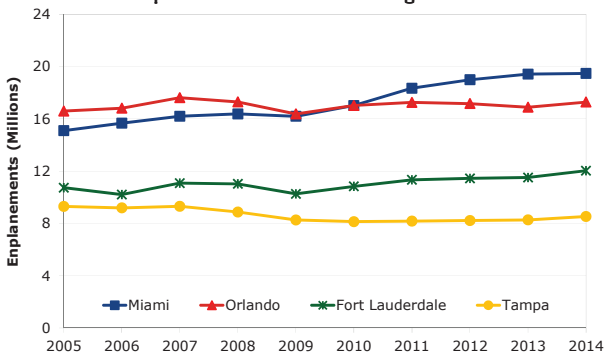
Airports

- Florida has 20 commercial service, 108 general aviation public use airports, and 651 private airports. Florida has nearly 11,600 based aircrafts* at public use airports.
- Florida is the only state with four large hubs and leads the world in pilot training.
- Air travel plays an important role in Florida's tourism, with 50.6% of the tourists arriving by air.
- Over the past 10 years, passenger enplanements have grown an average of 0.8% per year. Almost 80% of all enplanements took place at the four large hubs.

Florida Total Enplanements



Enplanements at Florida's Large Hubs



Sources: FDOT; FAA

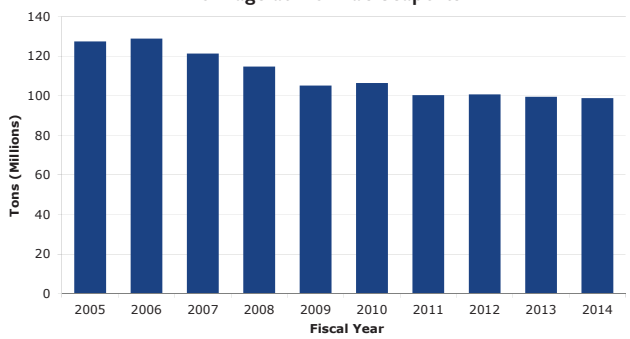
*An aircraft permanently stationed at an airport, usually by agreement between the aircraft owner and airport management.

Seaports

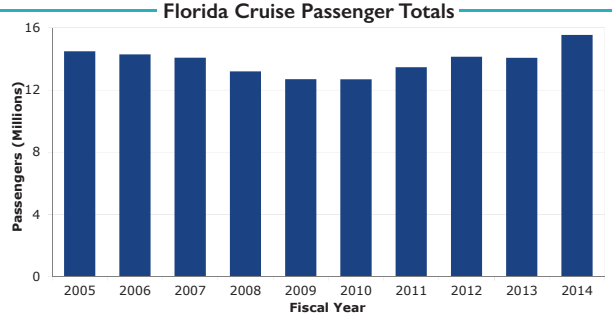
In FY 2014:

- Florida's 15 deepwater seaports moved 98.7 million tons of cargo and handled 3.3 million 20-feet equivalent container units.
- Florida's total waterborne tonnage decreased by 0.7% from 99.4 million tons in 2013 to 98.7 million tons in 2014.
- Container movements increased by 0.5% and waterborne cargo value increased by 1.1% from 2013.
- Seven of Florida's 15 seaports carried 15.6 million cruise passengers, 10.5% more than in 2013. Multi-day cruises accounted for 14.9 million passengers, an increase of 9.3%, whereas one-day cruises increased by 51.0%.

Tonnage at Florida's Seaports



Florida Cruise Passenger Totals

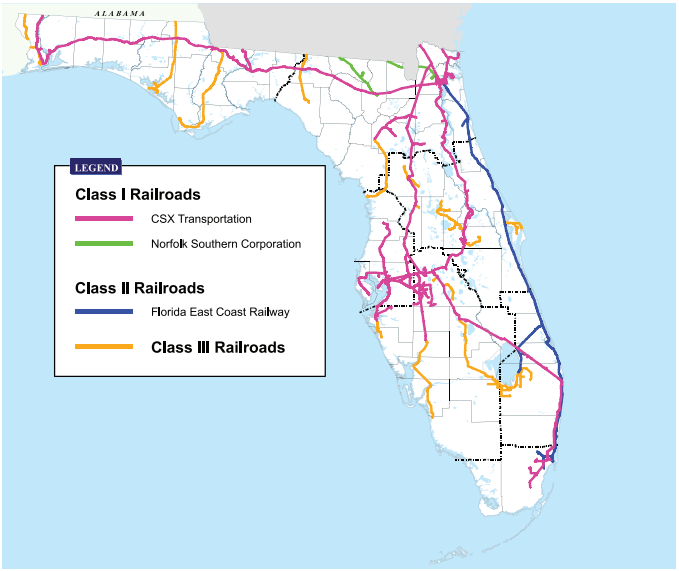


Sources: Florida Ports Council; FDOT

Rail Facilities and Services

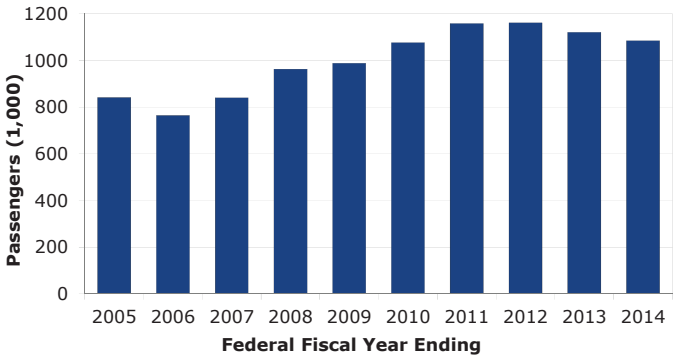
- There are 3,842 miles of rail lines in Florida, of which 2,743 miles make the mainline track. Fifteen freight railroads own all but 143 miles of the mainline track and control the entire track.
- There were 3,690 public at-grade rail crossings in Florida as of January 2015, which presented both safety and mobility challenges.
- In 2013, freight railroads in Florida moved nearly 88.7 million tons of freight.
- In 2013, Florida originated 798,200 rail carloads, a 4.4% increase from 2012 and terminated 1,265,900 carloads, a 3.7% increase. Florida ranks 12th and 9th among states, respectively, for originating and terminating tonnage.

Florida Rail Lines



- In FY 2014, the Auto Train carried 274 thousand passengers, removing 143 thousand vehicles from highways connecting Florida with the Northeast.
- Amtrak carried 1.1 million passengers in 2014. Ridership in Florida declined over the past two years, but still remains 41.9 percent above the 2006 level.
- Amtrak employed 794 Florida residents in 2014.
- Florida East Coast Industries (FECI) is currently working toward providing a privately owned and operated intercity passenger rail service by 2017, known as All Aboard Florida from Miami to Orlando with stops in Fort Lauderdale and West Palm Beach.

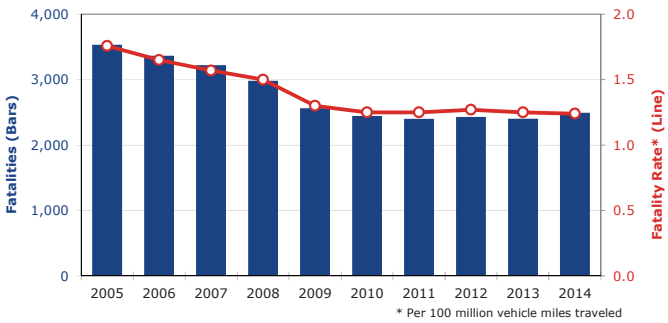
Amtrak Ridership in Florida



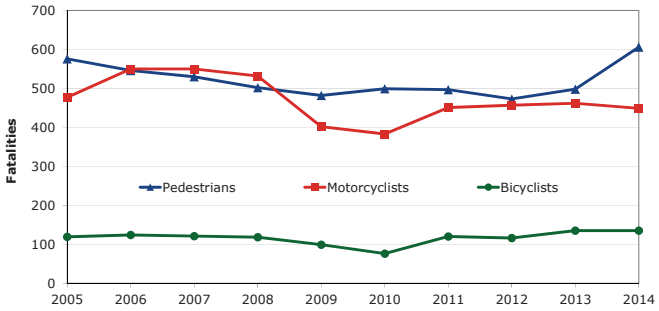
Sources: FDOT; Amtrak; Association of American Railroads; Federal Railroad Administration
Note: Existing urban rail transit services are included in the transit pages of the pocket guide.

Transportation Safety

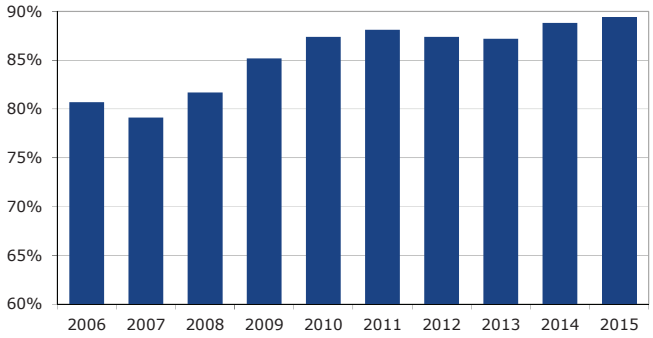
Total Florida Traffic Fatalities and Fatality Rate



Florida Vulnerable Road Users Fatalities



Percentage of Seat Belt Usage



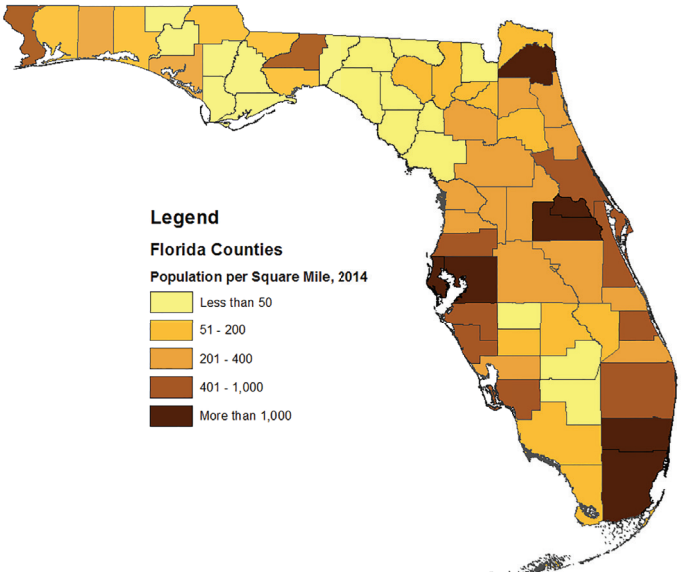
In 2014:

- Preliminary data suggests total traffic fatalities in the U.S. decreased by 0.1% to 32,675, resuming the decreasing trend which occurred from 2006 to 2011.
- The Florida Department of Highway Safety and Motor Vehicles (FLHSMV) reported traffic fatalities increased by 3.8% to 2,494.
- Florida's fatality rate decreased slightly to 1.24 fatalities per 100 million vehicle miles, marking the lowest rate in the past two decades.
- Of Florida's 2,494 traffic deaths, 48% were pedestrians, motorcyclists and bicyclists. Florida's Strategic Highway Safety Plan includes strategies to reduce the number of Vulnerable Road Users' fatalities.
- Pedestrian fatalities increased by 21.7%, while bicycle fatalities remained constant. Total motorcyclist fatalities decreased by 2.8%, but there was a 22.2% rise in motorcycle passenger deaths. Auto driver and passenger fatalities decreased 0.2%.
- Fatalities of teen drivers and passengers increased 5.8% to 109.
- In 2015, seat belt usage on Florida's roads is at an all-time high of 89.4% and continues to climb.
- Florida passed a new child restraint law in January 2015 requiring all children to use a child restraint device until the age of 6.

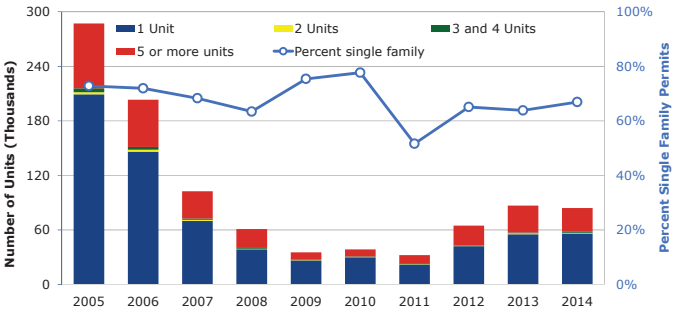
Sources: Florida Department of Highway Safety and Motor Vehicles; National Highway Traffic Safety Administration

Transportation and Land Use

Population Density 2014



Florida Housing Permits by Number of Units



Land-use intensity and patterns influence transportation system performance, energy use, safety, travel speed and consumption of land.

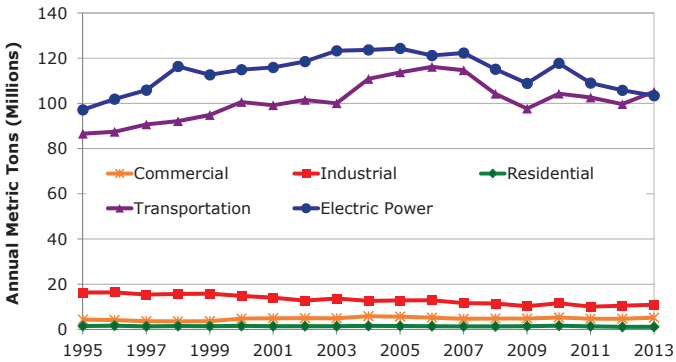
- Numerous initiatives to better integrate land use and transportation are underway including: future corridors planning, complete streets initiatives, transit-oriented development planning, access management practices, mobility fee programs, asset management initiatives, and other strategies targeting better transportation and land use coordination.
- Florida's population is concentrated in established metropolitan areas, 59% of Florida's population lives in census tracts that consume less than 5% of the land area. Population distribution impacts travel behavior.
- In 2014, 84,000 housing permits were issued, 29% of the 2005 level. Single family home building permits, consistently above 50% over the years, accounted for 67%.

Sources: U.S. Census Bureau; FDOT

Transportation and the Environment

- FDOT is coordinating with the Federal Highway Administration Florida Division to develop an application for participation in the Surface Transportation Project Delivery Program under the National Environmental Policy Act of 1969 (NEPA). FDOT would accept the Assignment of the USDOT Secretary's responsibilities for all NEPA document types and all environmental regulations/laws for highway projects.
- The department participates on the Transportation Sub-team of the Panther Recovery Implementation Team of the U.S. Fish and Wildlife Service (USFWS). The department's decisions on road alignment, wildlife crossings, land acquisition, and restoration can help reduce impacts to the panther.
- FDOT is funding a research study on the use of swales, canals, and drainage ponds by wood storks. These roadway features can provide habitat for the endangered wood storks. The study will help the department understand the use of the roadway features by these endangered birds and help FDOT to develop roadways to accommodate this species.
- By incorporating the latest US Environmental Protection Agency emission factors model and more geometric intersection types, FDOT uses a recently revised carbon monoxide screening model to ensure the national ambient air quality standard for carbon monoxide is not exceeded at the project level. To date all projects are meeting these standards
- Department staff presented FDOT's Sociocultural Effects Evaluation process at the 2015 Southern Transportation Civil Rights Training Symposium, focusing on identifying potential impacts to the human environment within project areas.
- FDOT recently signed a Memorandum of Understanding (MOU) with the Florida Department of Environmental Protection (FDEP) for addressing petroleum pollutants which have migrated to state transportation facilities from offsite properties. The MOU also allows FDEP to prioritize the cleanup of petroleum contaminated sites in advance of significant transportation projects.
- The department is funding staff at USFWS to develop species-specific programmatic agreements and approaches. Programmatic agreements create a streamlined process for handling environmental requirements by considering repetitive actions on a program basis rather than individually by project. USFWS is developing programmatic consultation for construction activities that may affect listed mussel species and their critical habitat units.

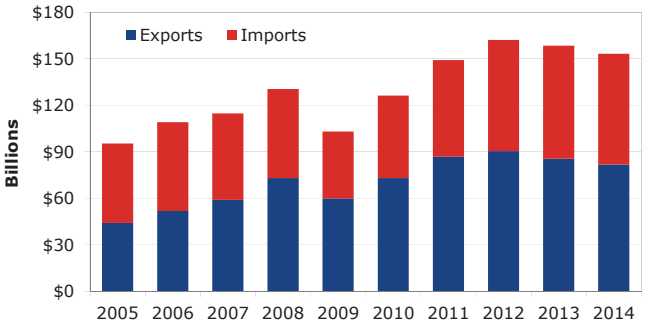
Florida Fossil Fuel CO2 Emissions by Sector



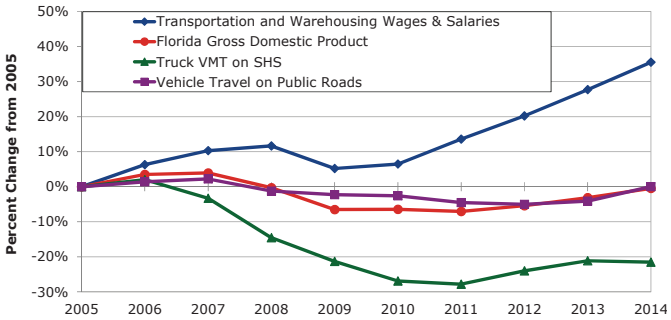
Sources: FDOT; U.S. Environmental Protection Agency (EPA); U.S. Energy Information Administration

Transportation and the Economy

Florida International Trade



Trends in Travel and Economic Activities

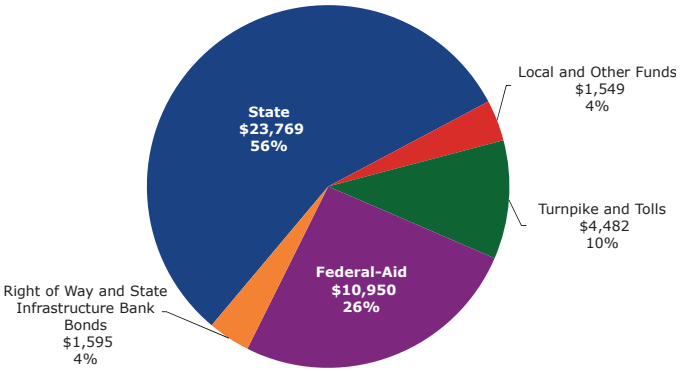


- From 2012 to 2014, Florida's real Gross Domestic Product increased by an estimated 2.6% per year, showing renewed economic growth exceeding the population increase of 1.1% per year.
- Florida is focusing the state's role in transportation provision on statewide and interregional travel as well as reemphasizing the critical linkage among transportation, economic competitiveness, and land use.
- Florida's international trade totaled $153 billion in 2014, a 5.5% decrease from the all-time high reached in 2012.
- As the seventh-largest export state in the U.S., Florida exported goods and services worth $82 billion in 2014. Exports exceeded imports by $10 billion.
- Vehicle miles traveled on the public road system increased 4.3% between 2013 and 2014.
- Truck miles traveled (TMT) on the State Highway System (SHS) continued a rebound in 2014. In 2014, TMT constituted 8.3% of vehicle mileage on SHS.
- Wages and salary disbursements for Transportation and Warehousing industries saw a gain of over 5.9% in 2014, reaching a new record.
- Employment in Transportation and Material Moving Occupations, which includes most direct transportation workers, accounts for 6.0% of total employment in Florida. In 2014, the industry employed an estimated 463,740 workers, up from 444,900 in 2013.
- Total construction employment in Florida, including transportation construction, increased by 79,400 workers over the past three years.

Sources: U.S. Bureau of Labor Statistics; U.S. Bureau of Economic Analysis; FDOT

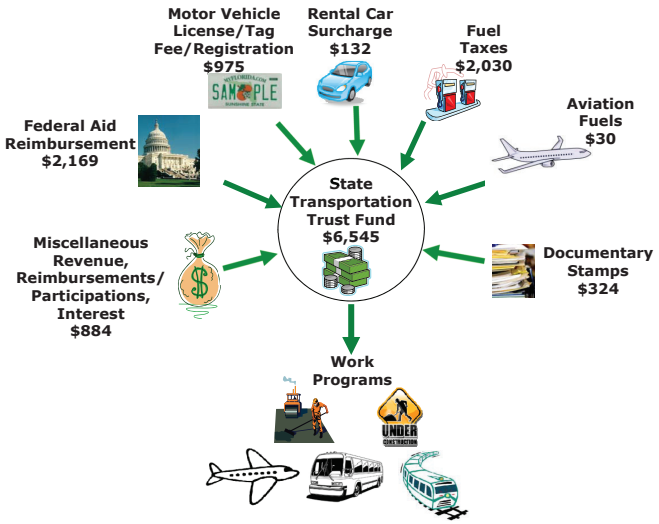
Transportation Resources

Five-Year Work Program Funding Sources (Millions)
FY 2016 - 2020



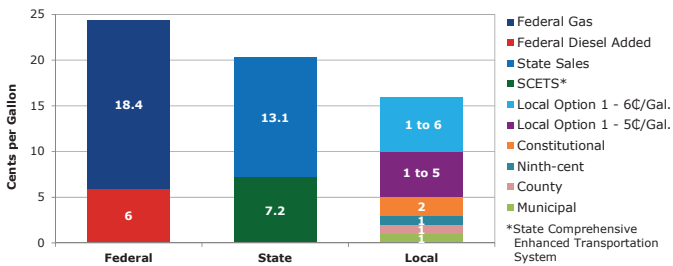
Total Five-Year Adopted Work Program $42.3B

State Transportation Trust Fund Receipts (Millions)
FY 2014 - 2015

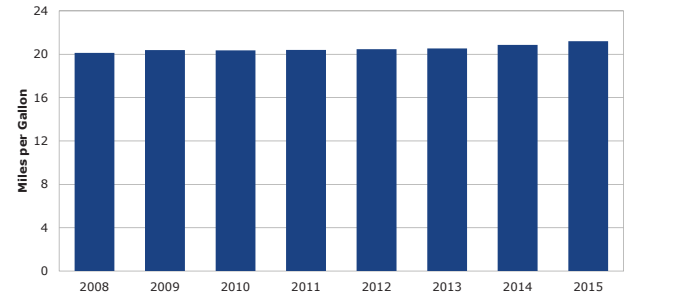


- Resources for the Five-Year Work Program mainly come from the state (56%) and federal aid (26%), and are representative of the planned commitments for the whole transportation department over the next 5 years.
- A variety of sources support both past and present commitments of the State Transportation Trust Fund: fuel taxes, motor vehicle fees, rental car surcharges, etc.
- Fuel tax rates are the sum of federal, state and local taxes. The tax rates for a gallon of motor fuel vary by county. The maximum rate for gasoline is 55.0 cents per gallon The maximum rate for diesel is 56.0 cents per gallon.
- From 2008 to 2015, average fuel efficiency for Florida's fleet of vehicles increased by 1.1 mpg.

Calendar Year 2015 Fuel Tax Rates by Jurisdiction



Miles per Gallon for New Light Vehicles



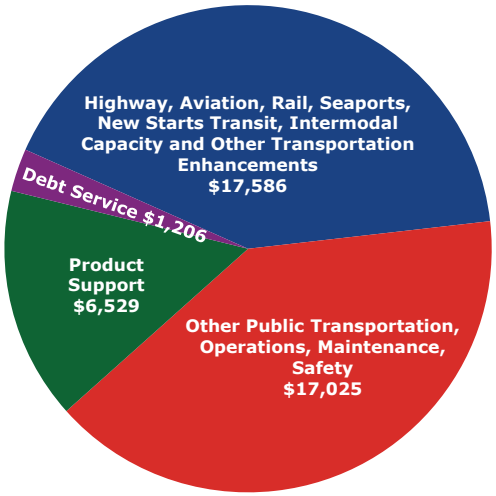
Source: FDOT Office of Comptroller; IHS Connect

TRANSPORTATION FUNDING

Transportation Investments

- State and federal resources for transportation are used to fund FDOT's Five-Year Work Program. The program is complemented with local government, business and private investments in transportation vehicles facilities and services. They collectively fund the overall transportation system.
- The 2016-2020 Work Program decreased 2.2% or $923 million from the 2015-2019 Work Program. The decrease occurred in the allocations for transportation improvements.

Five-Year Work Program Allocations (Millions)
FY 2016-2020



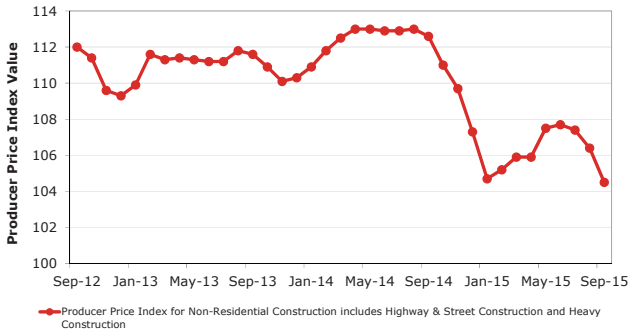
Total Five-Year Adopted Work Program $42.3B

Source: FDOT Office of Work Program & Budget

Transportation Costs

- Nationally, construction costs rose 23% over the past three years, while Florida construction costs decreased 3% during that same time period.
- After plateauing for most of 2014, Florida's non-residential construction costs started to drop in late 2014 and reached a low point by January 2015.
- Transportation construction costs are influenced by automation, construction industry capacity, and costs of major inputs, including labor, materials and fuel.

Producer Price Index for Non-Residential Construction



Source: U.S. Bureau of Labor Statistics
Note: Non-residential construction includes highway, street and heavy construction.

FAST FACTS AND LINKS

Florida Fast Facts

General

19.5 million people – 3rd most populous state
87.6% living in urban areas
18.6% age 65 and older
98.7 million visitors
53,625 square miles of land

Transportation System:

122,392 centerline miles of public roads
12,116 centerline miles of State Highway System
43,593 lane miles of State Highway System
674 centerline miles of toll facilities
3,077 lane miles of toll facilities
12,225 bridges, 6,814 maintained by the state
31 urban fixed route transit agencies
387 transportation disadvantaged operators
15 deepwater seaports, 7 with cruises
779 airports
128 public use
651 private use
2 spaceports
15 railroads
2,743 miles of mainline track
3,690 public at-grade crossings
2 Amtrak routes – 18 stations
15 million registered personal motor vehicles

System Usage

201,040 million annual vehicle miles of travel
72 million enplanements
277 million transit trips
29 million transportation disadvantaged trips
15.6 million cruise passengers
1,027 million tons of freight traffic

Links

Florida Transportation Plans and Studies
www.dot.state.fl.us/planning/plans

Florida Transportation Performance
www.fdotperforms.org

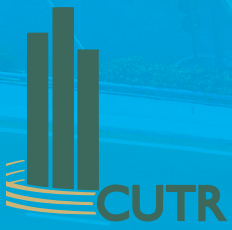
Florida Transportation Trends and Conditions
www.dot.state.fl.us/planning/trends

Florida's Transportation System by the Numbers
www.dot.state.fl.us/intermodal/system

FDOT Transportation Statistics Office
www.dot.state.fl.us/planning/statistics

Florida Transportation Indicators
www.floridatransportationindicators.org

Florida Ports Council
www.flaports.org

Florida Aviation Data and Forecasts
www.dot.state.fl.us/aviation/dataforecasts.shtm

Produced by
Florida Department of Transportation
Office of Policy Planning
with support from
Center For Urban Transportation Research