Florida’s Market for New Transportation

New Corridors Charrette
August 14 -15, 2006
Today’s Objectives

- Create an Atmosphere for Critical/Innovative Thinking
- Highlight Florida’s Business Climate
- Review Trends and Conditions
- Lay the Foundation for Breakout Groups
**Desired Outcomes**

- Initial statewide corridors ready for detailed feasibility studies by the end of the year, with others to follow.
- Network of new statewide corridors that:
  - Will serve Florida over the next 50 years.
  - Are planned, financed and managed in collaboration with the public and private sectors.
Florida – A Global Business Climate

- 4th most populous state
- 4th largest labor force
- 7th lowest unemployment rate
- 4th highest number of business establishments
- 3rd largest state for high-tech companies
- 4th largest Gross State Product
- 8th Largest economy in Western Hemisphere
- 18th largest economy in the world

Source: Enterprise Florida
Economy: Key Trends

- Continued strong economic growth
- Shift toward regional economic centers
- Shift toward global markets
- Shift toward service and information industries
- Need focused strategy in economically distressed regions
Florida Population, 1970-2030

Source: U.S. Census Bureau; University of Florida, Bureau of Economic and Business Research; and Florida Department of Transportation
### All Economic Regions Growing
Population Change from 2005 to 2030

<table>
<thead>
<tr>
<th>Region</th>
<th>Level 2005 (Thousands)</th>
<th>Change 2005-2030 (Thousands)</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northwest</td>
<td>1,334</td>
<td>+460</td>
<td>35%</td>
</tr>
<tr>
<td>North Central</td>
<td>516</td>
<td>+177</td>
<td>34%</td>
</tr>
<tr>
<td>Northeast</td>
<td>1,397</td>
<td>+629</td>
<td>45%</td>
</tr>
<tr>
<td>Central</td>
<td>3,313</td>
<td>+1,835</td>
<td>55%</td>
</tr>
<tr>
<td>Tampa Bay</td>
<td>3,937</td>
<td>+1,450</td>
<td>37%</td>
</tr>
<tr>
<td>Heartland</td>
<td>245</td>
<td>+95</td>
<td>39%</td>
</tr>
<tr>
<td>Southwest</td>
<td>999</td>
<td>+684</td>
<td>68%</td>
</tr>
<tr>
<td>Southeast</td>
<td>6,018</td>
<td>+2,404</td>
<td>40%</td>
</tr>
</tbody>
</table>

Source: Enterprise Florida, Florida’s Strategic Plan for Economic Development; Florida Office of Economic and Demographic Research, 2000 Forecast; and U.S. Census Bureau, 2004 Forecast.
Economically Distressed Areas
Annual Visitors Will Double By 2030…

Annual Visitors (In Millions)

Source: Florida Department of Transportation using Visit Florida data.
Passenger Movements Will Continue to Outpace Population Growth

<table>
<thead>
<tr>
<th>Mode</th>
<th>Measure</th>
<th>2002 (Actual)</th>
<th>2025 (Forecast)</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto</td>
<td>Vehicle miles traveled (millions)</td>
<td>178,681</td>
<td>274,503</td>
<td>54%</td>
</tr>
<tr>
<td>Transit</td>
<td>Trips (millions)</td>
<td>208</td>
<td>325</td>
<td>56%</td>
</tr>
<tr>
<td>Air</td>
<td>Enplanements (millions)</td>
<td>57</td>
<td>97</td>
<td>72%</td>
</tr>
<tr>
<td>Water</td>
<td>Cruise passengers (millions)</td>
<td>13</td>
<td>28</td>
<td>115%</td>
</tr>
<tr>
<td>Rail</td>
<td>Interregional passengers (millions)</td>
<td>0.9</td>
<td>1.2</td>
<td>29%</td>
</tr>
<tr>
<td></td>
<td>Population (millions)</td>
<td>16.7</td>
<td>23.7</td>
<td>42%</td>
</tr>
</tbody>
</table>

Growth Continues: Most Freight Flows are within Florida

Exports
72M tons

Imports
200M tons

Within Florida
575M tons

Source: Federal Highway Administration, Freight Analysis Framework 2, 2002 data.
International Trade Will Increase Rapidly

Value of Trade ($Billion)

1990 2000 2010 2020

Implications for Florida’s Highway System

- Increases in vehicle-miles traveled
  - People
  - Freight
- Growth in congested corridors
  - Urban areas
  - Interregional corridors
Strategic Intermodal System (SIS)
Growth Continues: Congested Corridors, 2005

SIS Highways Not Meeting Level of Service Standards in 2005

LEGEND

Highways Not Meeting Standards as of Year 2005*

Other Facilities:
- Existing SIS/ESIS Facilities
- Planned SIS/ESIS Facilities

NOTES
- SIS Highways not meeting standards are defined as those facilities operating below FDOT's statewide minimum level of service standards as specified in "Rule Chapter No. 14-94".

LEGEND

Highways Not Meeting Standards as of Year 2005*

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Growth Continues: Congested Corridors, 2025

SIS Highways Not Meeting Level of Service Standards in 2025

State of Florida
Department of Transportation

LEGEND

Highways Not Meeting Standards as of Year 2025

Other Facilities:

Existing SIS/ESIS Facilities

Planned SIS/ESIS Facilities

NOTES

* Includes lanes added as a result of constructing the Ten-Year Plan through 2015 with Growth Management funds and the FHS Cost Feasible Plan through 2025.

** SIS Highways not meeting standards are defined as those facilities operating below FDOT's statewide minimum level of service standards as specified in "Rule Chapter No. 14-94".
Transportation Improvements Must Be Balanced With Environmental Stewardship

Population Density by Census Tract in 2030
(Population per Square Mile)

- 501 - 1,000
- 1,001 - 2,500
- 2,501 - 5,000
- Above 5,000

SIS & Emerging SIS Highways
Public and private lands currently managed for conservation
Florida Forever Board of Trustees projects proposed for acquisition

Current and Abandoned Railways

Source: National Transportation Atlas Database 2005, Florida Department of Transportation
Utility Alignments

Source: National Gas Lines-Florida Public Service Commission, Florida Geographic Data Library, 2005
Proposed Guiding Principles

- Florida’s future Statewide Corridors should:
  - Provide safe, efficient and reliable mobility for both people and freight
  - Provide high-speed, high-capacity connections between Florida and other states and nations, or between economic regions within Florida
  - Balance mobility and economic competitiveness with community livability and environmental stewardship
  - Be financed through innovative financing including user fees and private/public partnerships to the maximum extent possible
Proposed Criteria –

- **Connectivity**
  - ✓ New connection

- **Economic Competitiveness**
  - ✓ Statewide industry clusters
  - ✓ Trade and visitors
  - ✓ Fast-growing and economically distressed areas

- **Community and Environment**
  - ✓ Local government comprehensive plans
  - ✓ Statewide and regional visioning
  - ✓ Environmental stewardship

- **Financial Feasibility**
  - ✓ Self-financed
  - ✓ Attainable right of way
Questions and Discussion