



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

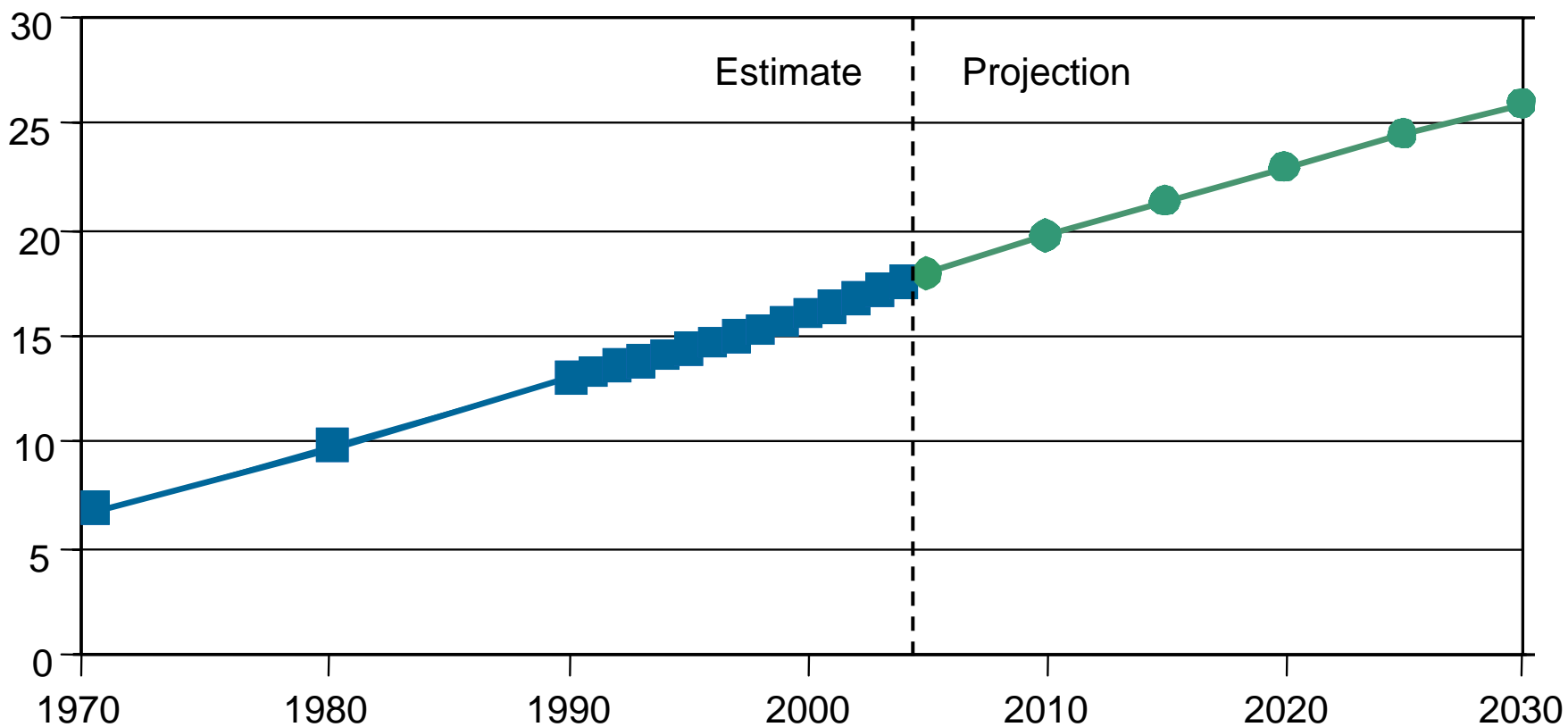
Economy: Key Trends

- ◆ 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



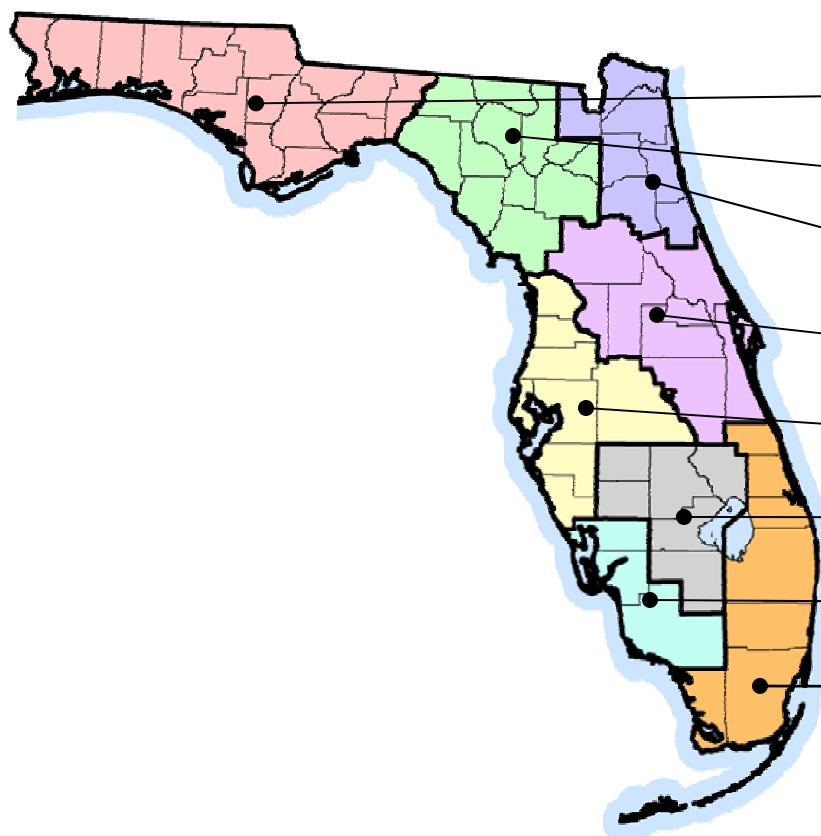
Population
(millions)



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

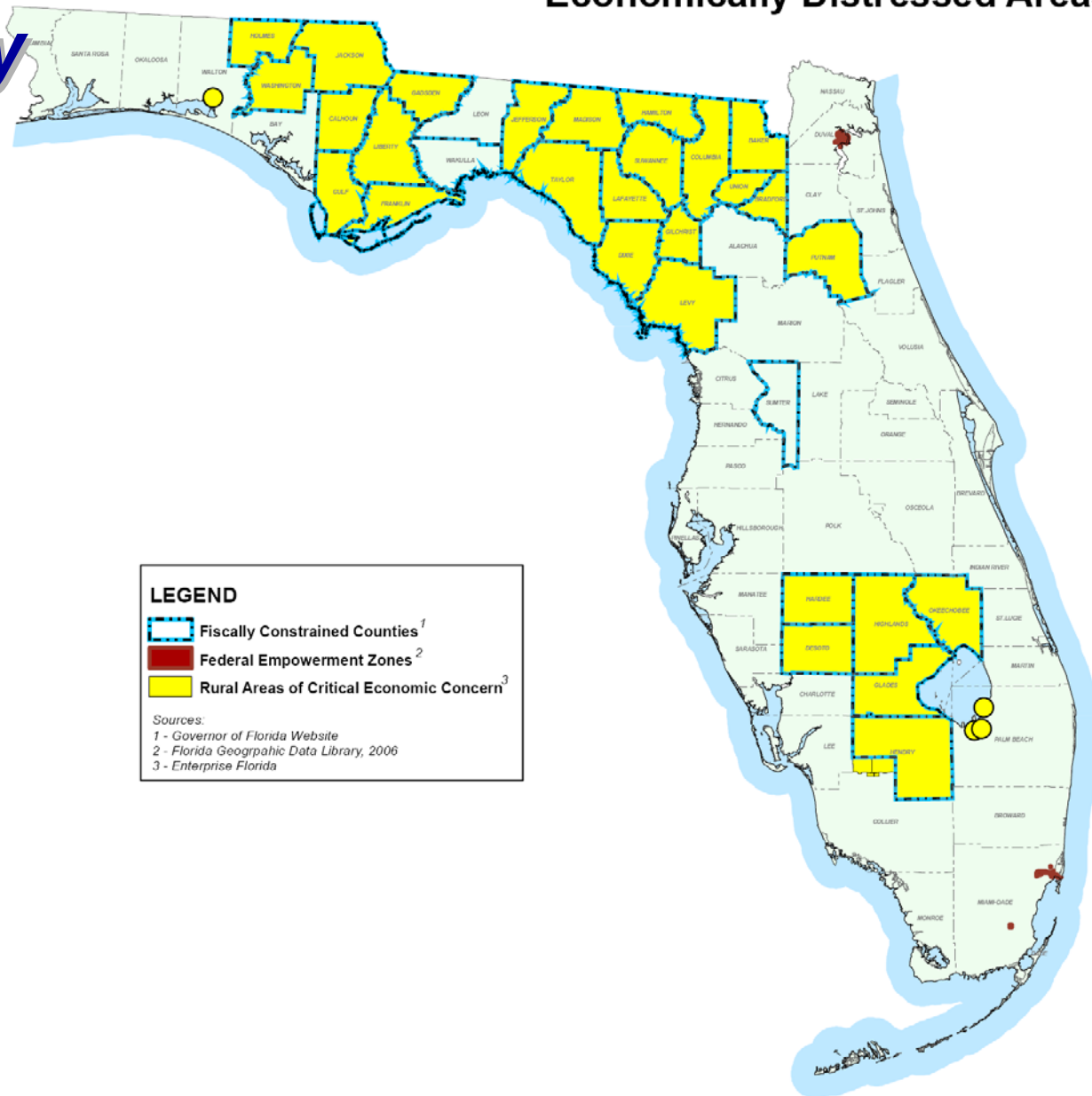


Region	Level 2005 (Thousands)	Change 2005-2030 (Thousands)	% Change
Northwest	1,334	+460	35%
North Central	516	+177	34%
Northeast	1,397	+629	45%
Central	3,313	+1,835	55%
Tampa Bay	3,937	+1,450	37%
Heartland	245	+95	39%
Southwest	999	+684	68%
Southeast	6,018	+2,404	40%




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

Economically Distressed Areas



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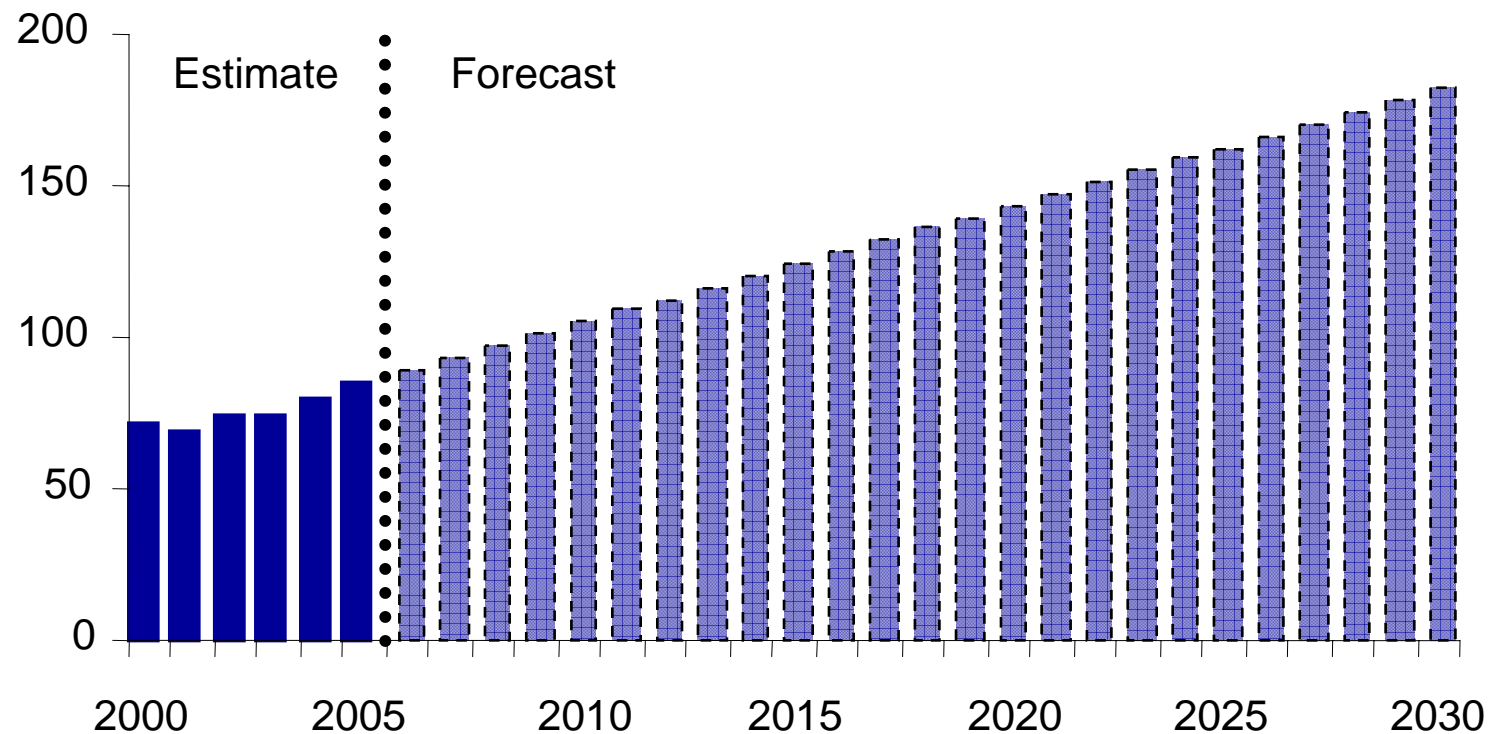
-  Fiscally Constrained Counties¹
-  Federal Empowerment Zones²
-  Rural Areas of Critical Economic Concern³

Sources:

- 1 - Governor of Florida Website*
- 2 - Florida Geographic Data Library, 2006*
- 3 - Enterprise Florida*

Annual Visitors Will Double By 2030...

Annual Visitors
(In Millions)



Source: Florida Department of Transportation using Visit Florida data.

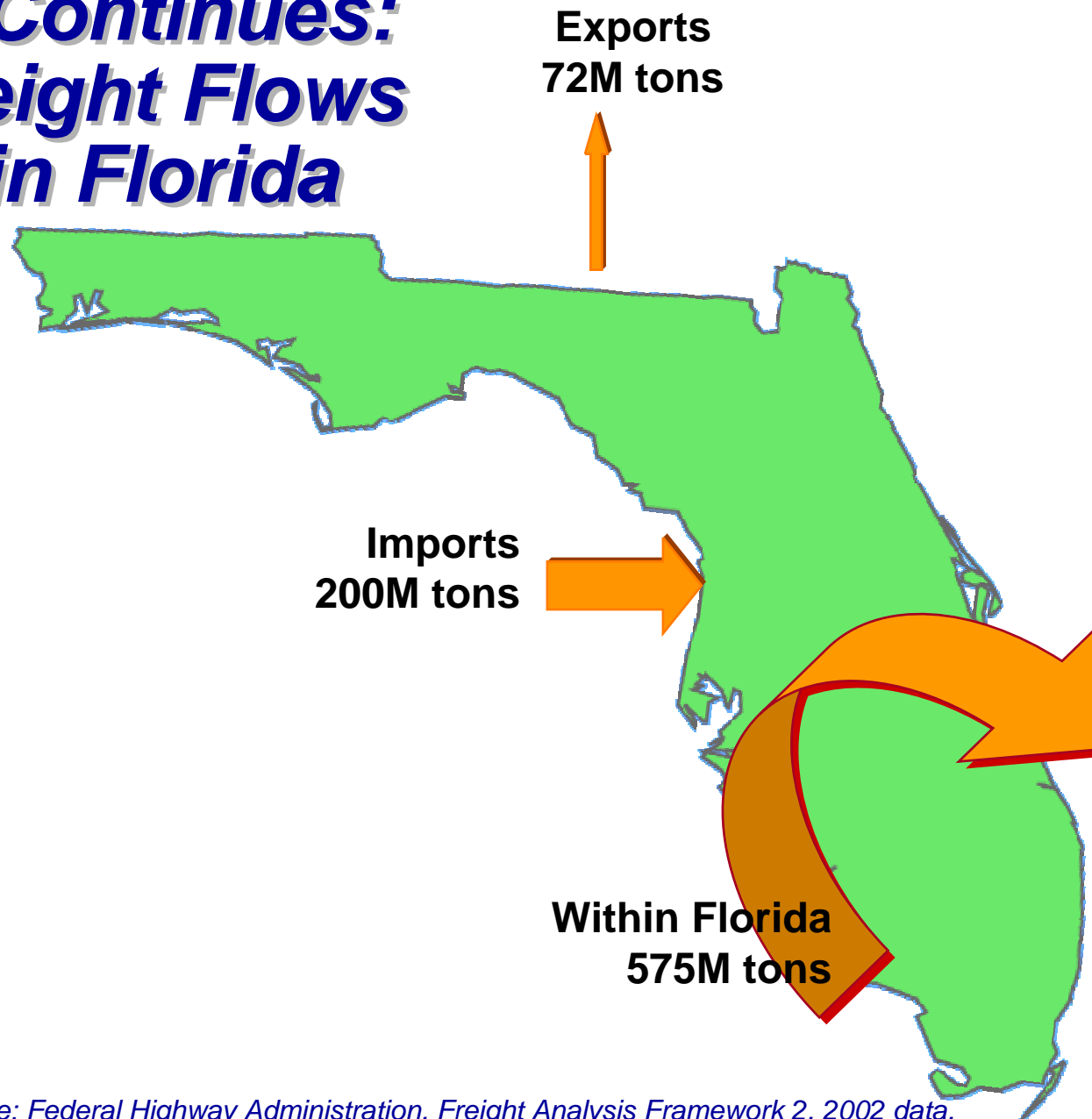


Passenger Movements Will Continue to Outpace Population Growth

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

Source: Florida Department of Transportation, Aviation Office (2002), Rail Office (2003), Transportation Statistics Office (2002), Transit Office (2005), Florida Ports Council (2003), Census Bureau (2003)

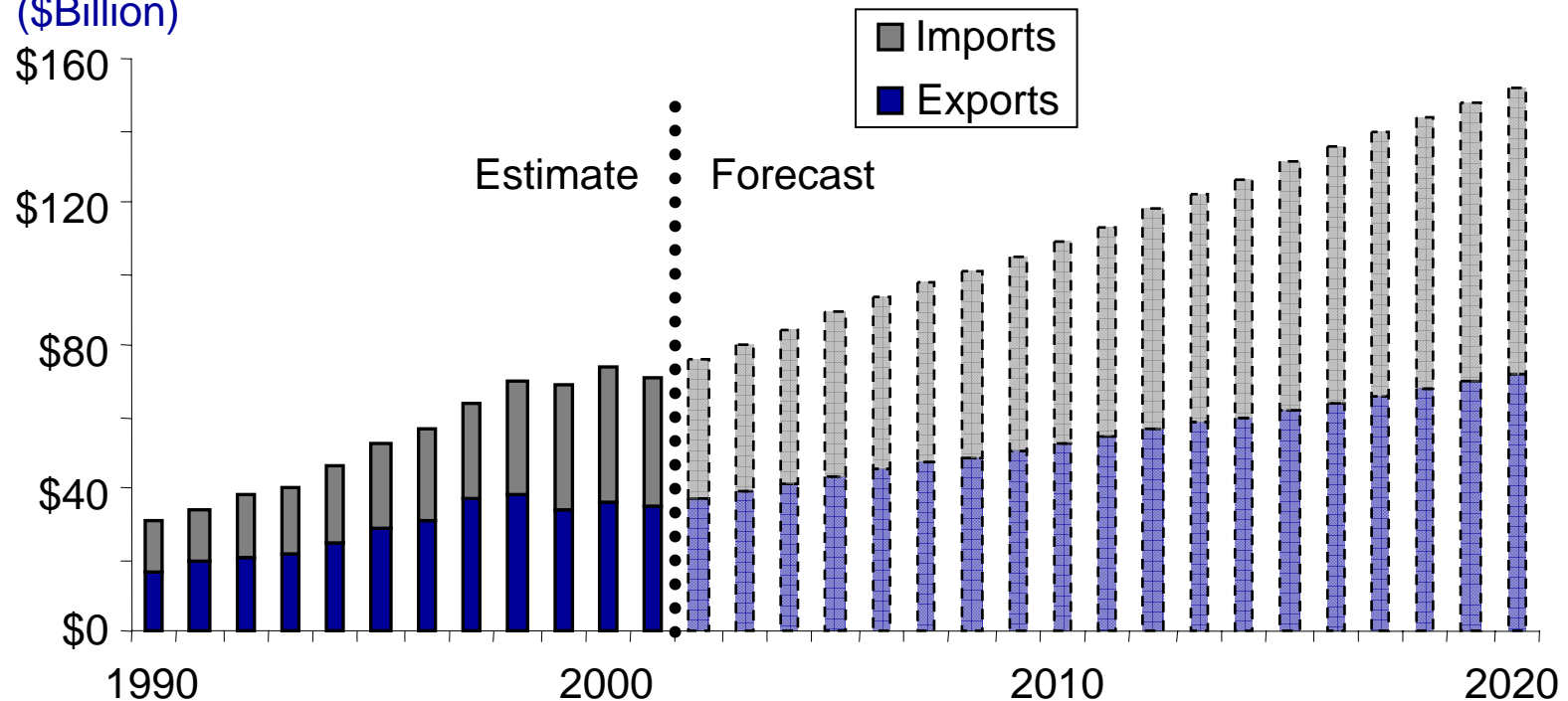
Growth Continues: Most Freight Flows are within Florida



Source: Federal Highway Administration, Freight Analysis Framework 2, 2002 data.

International Trade Will Increase Rapidly

Value of Trade
(\$Billion)

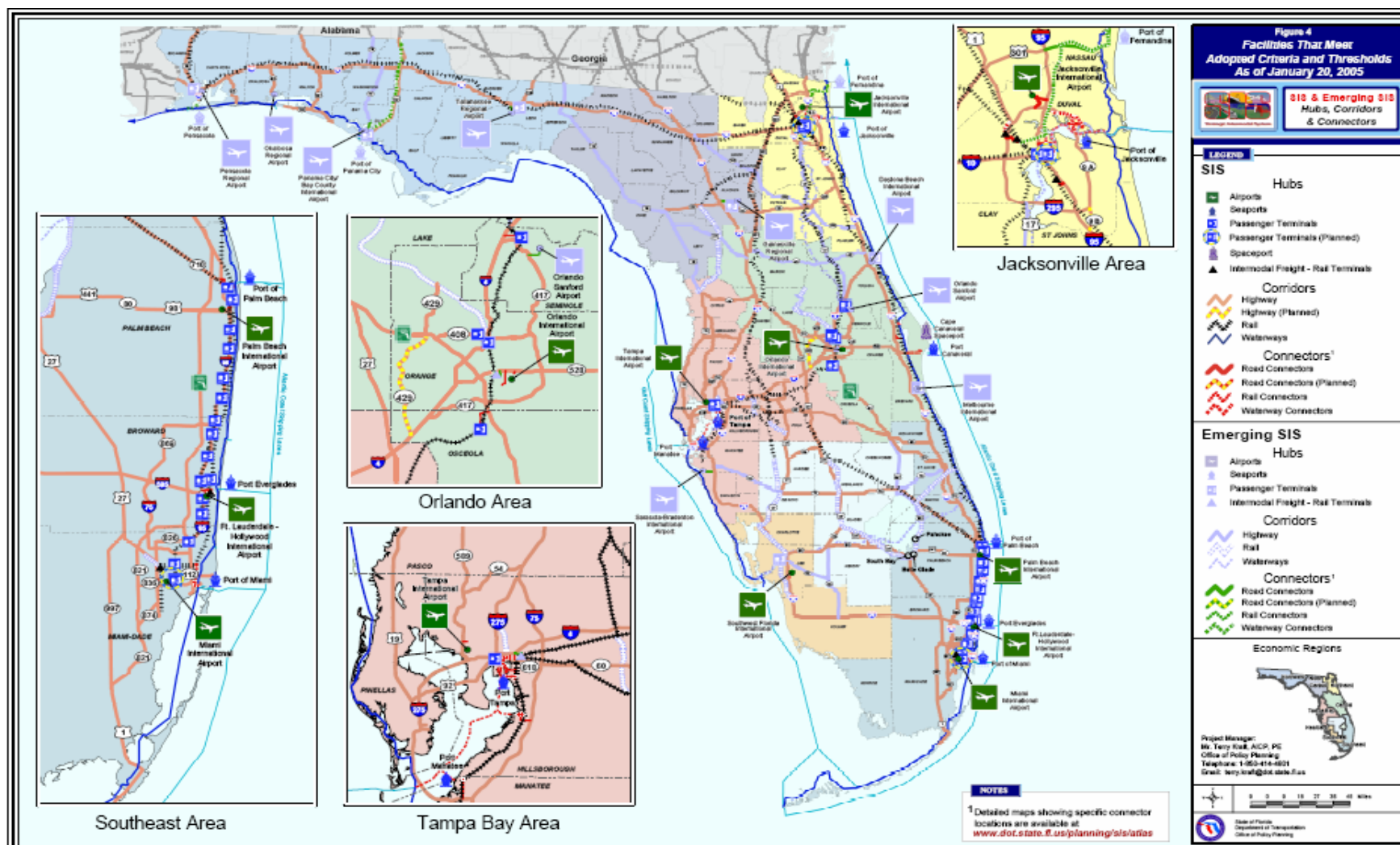


Source: Florida Seaport Transportation and Economic Development Council, February 2002.

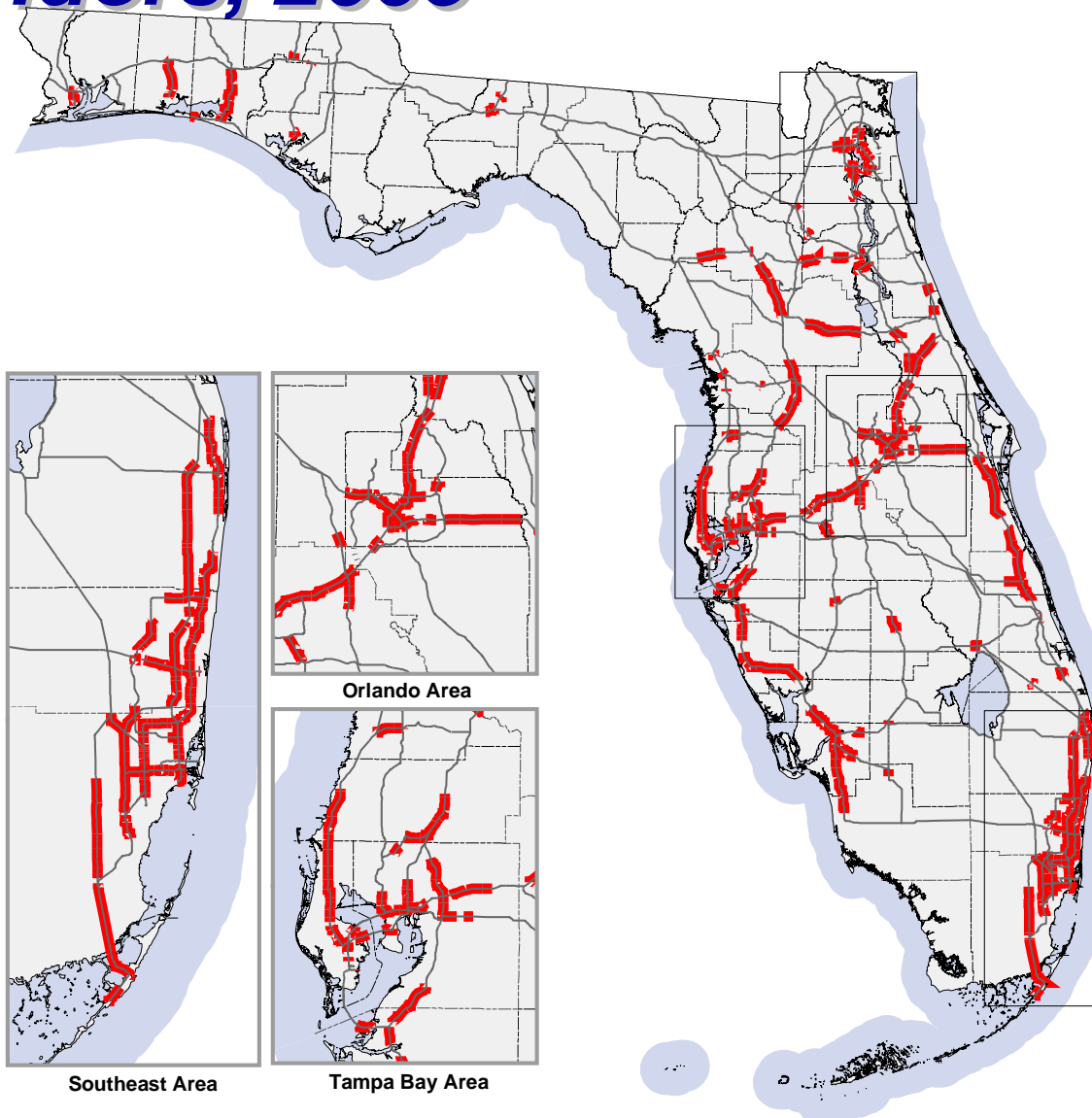
Implications for Florida's Highway System

- ◆ 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

State of Florida
Department of Transportation

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— Highways Not Meeting Standards as of Year 2005*

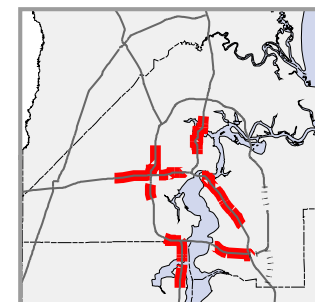
Other Facilities:

— 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".



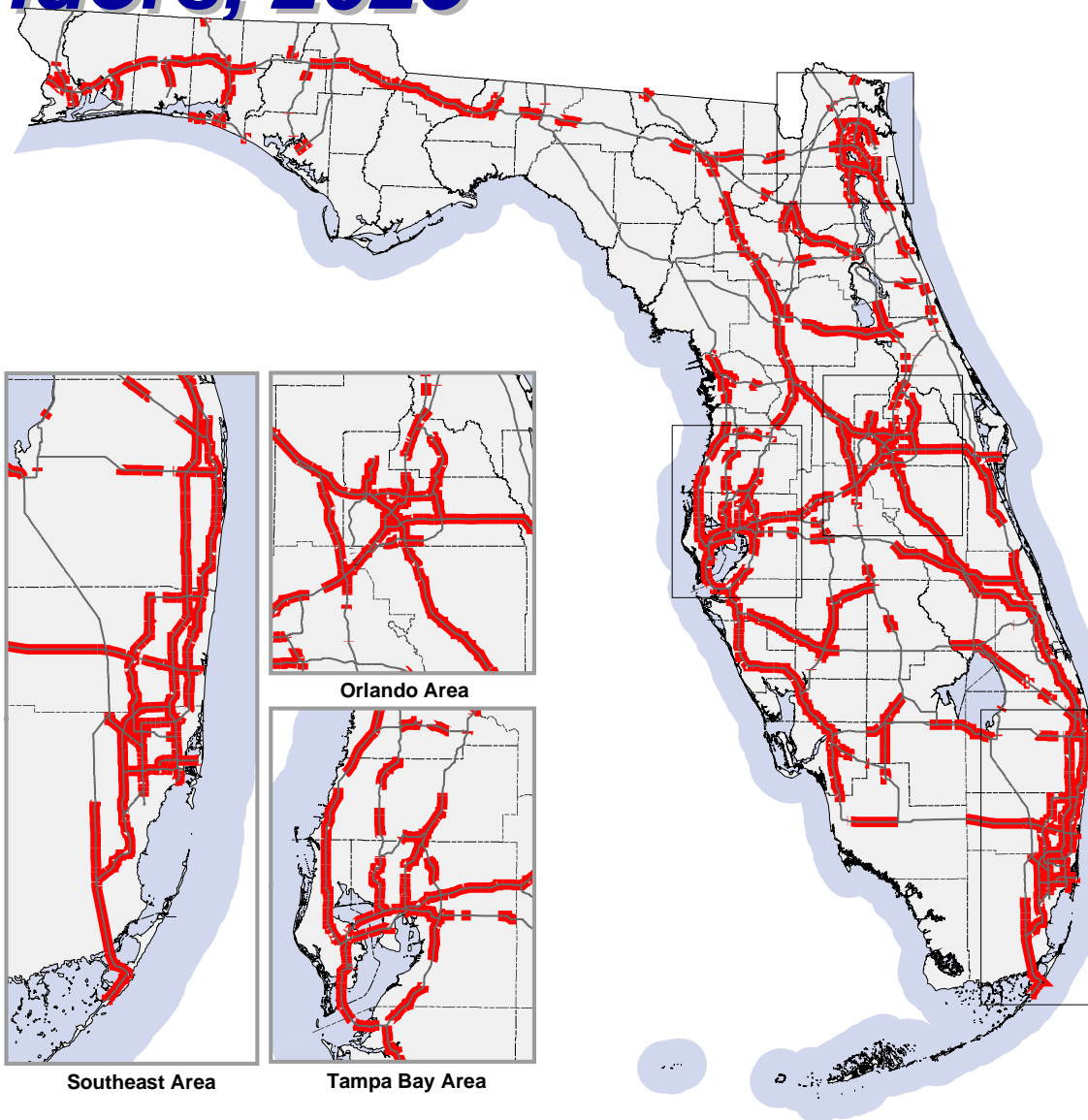
Jacksonville Area

Southeast Area

Tampa Bay Area

Orlando Area

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:

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--- 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 FHIS Cost Feasible Plan through 2025.

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Southeast Area

Orlando Area

Tampa Bay Area

Jacksonville Area

Transportation Improvements Must Be Balanced With Environmental Stewardship

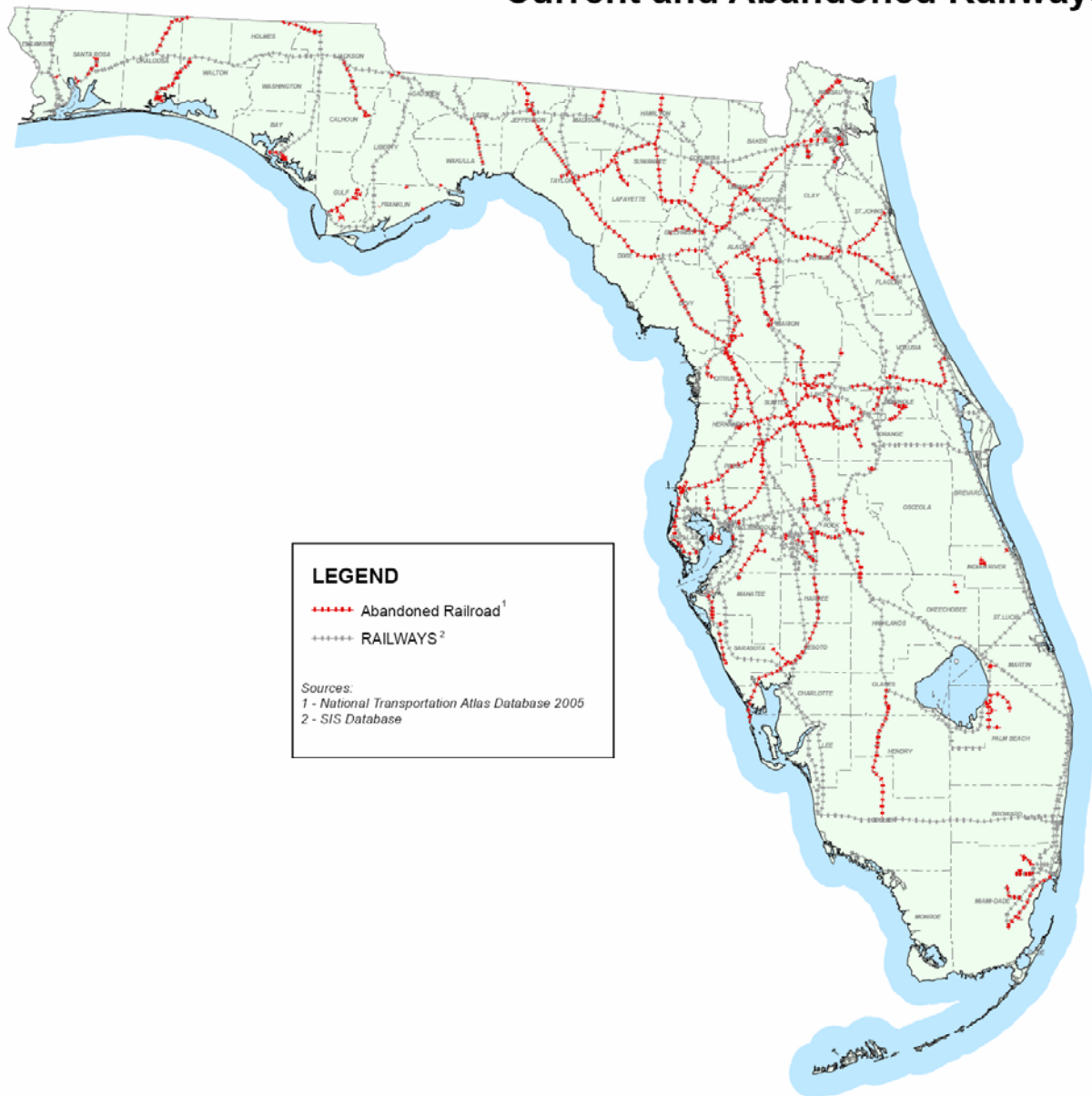
Population Density by Census Tract in 2030
(Population per Square Mile)



Source: University of Florida Bureau of Economic and Business Research (BEBR), 2002.

Current and Abandoned Railways

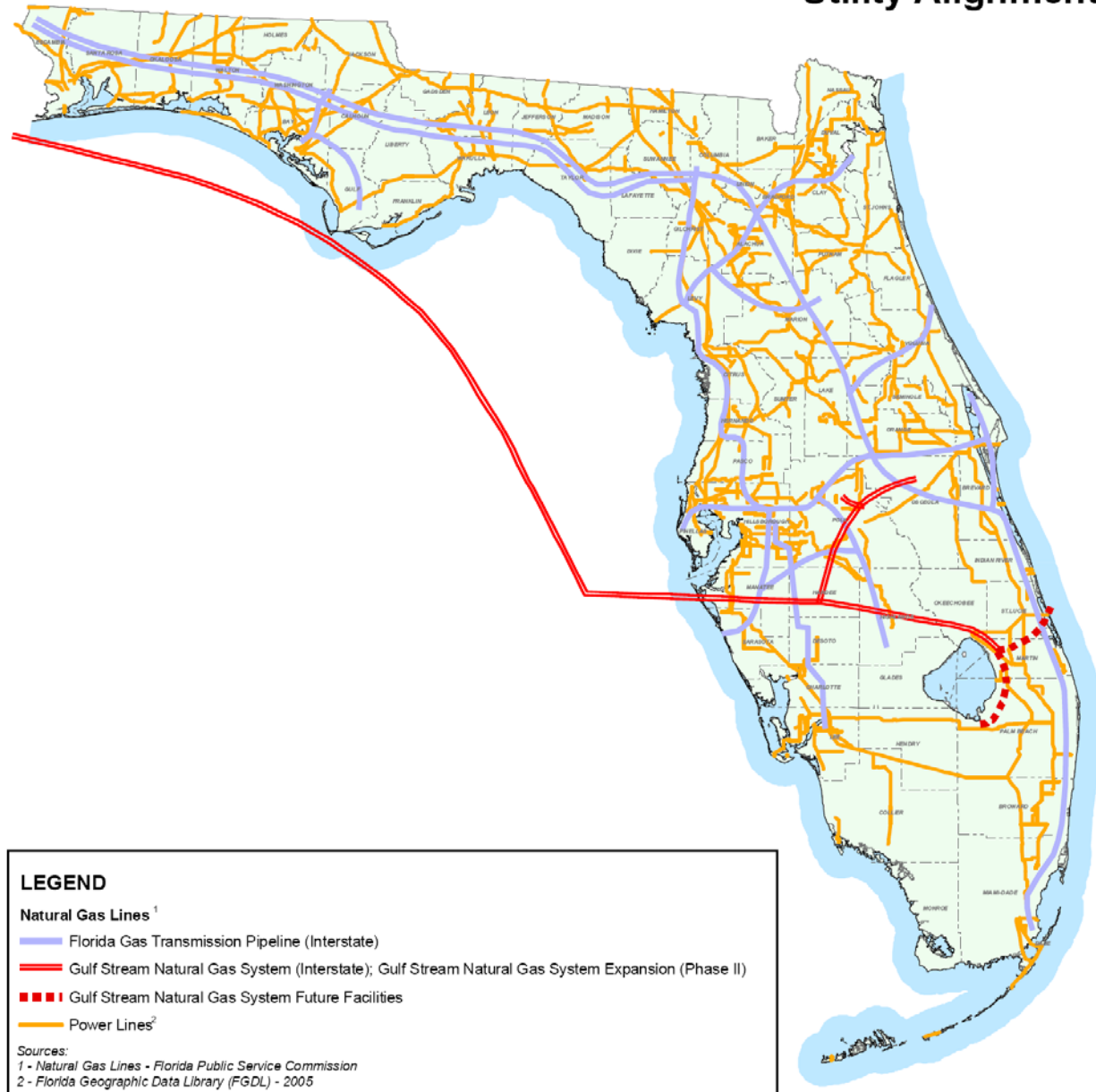
Current and Abandoned Railways



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

Utility Alignments

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

