



Future of Transportation in Florida

Florida Transportation Commission
“Meeting of the Modes”
February 12, 2007

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Office of Policy Planning
Florida Department of Transportation



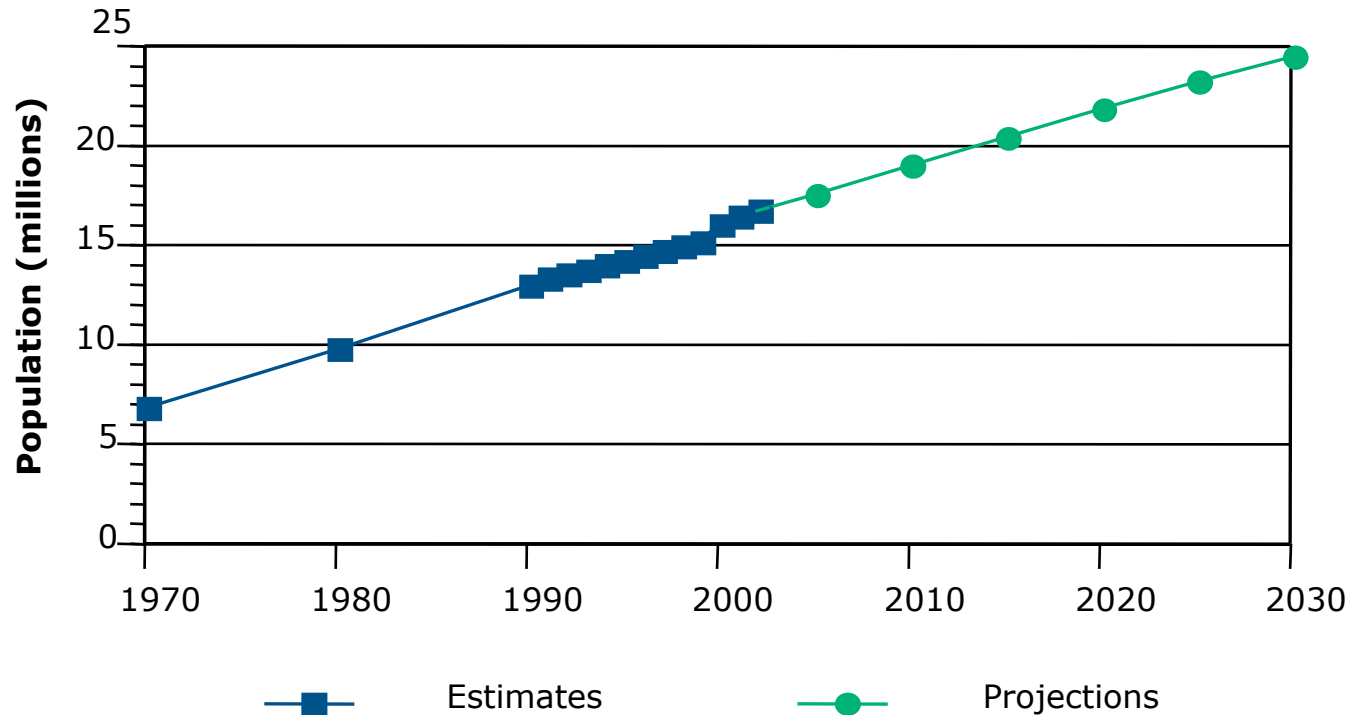
Key Trends Shaping Mobility

- Continued strong population and economic growth
- Shift toward regional economic centers
- Shift toward national and global markets
- Shift toward service and information industries
- Continued concerns about growth management and environmental stewardship



Population Growth

Florida Population, 1970-2030

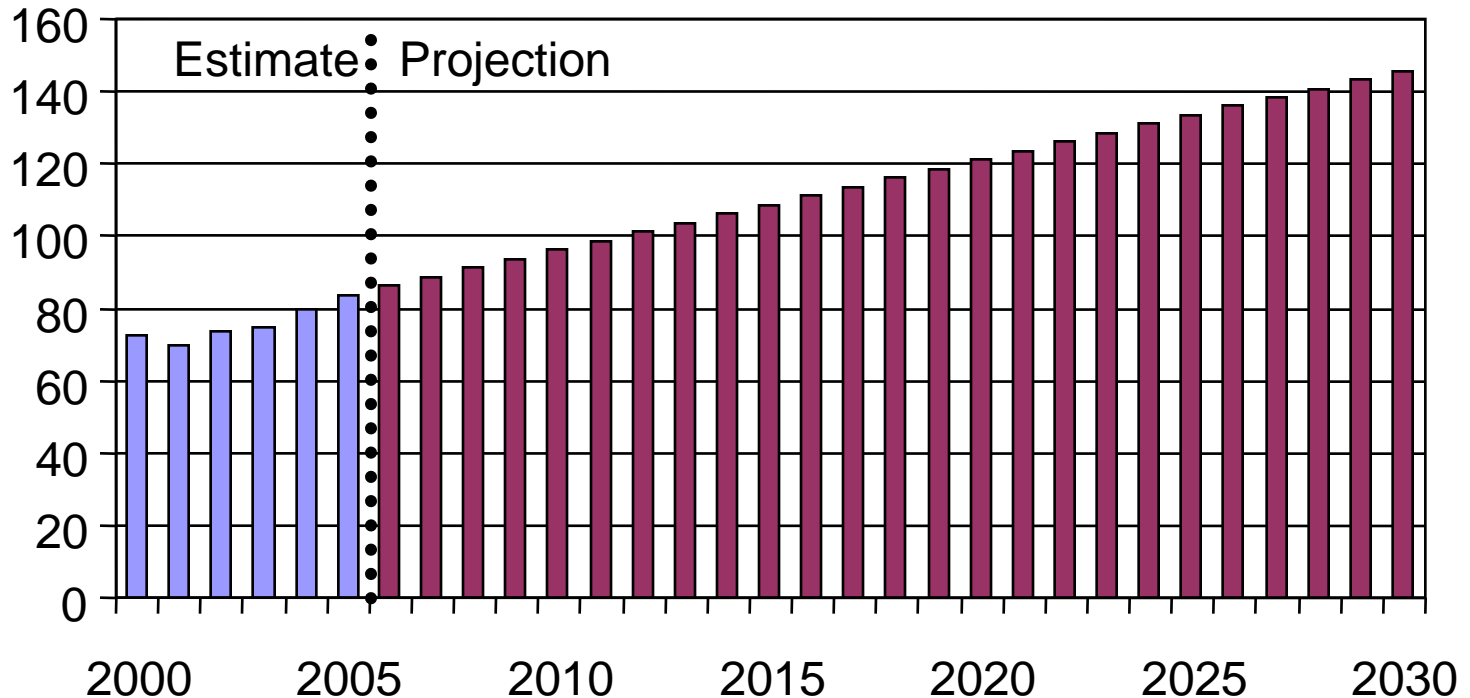


Source: U.S. Census Bureau, Historical Census; University of Florida, Bureau of Economic and Research, Projections of Florida Population by 2002.



Visitors Are Increasing, Too

Visitors
(Millions)



Source: Florida Department of Transportation using Visit Florida data.



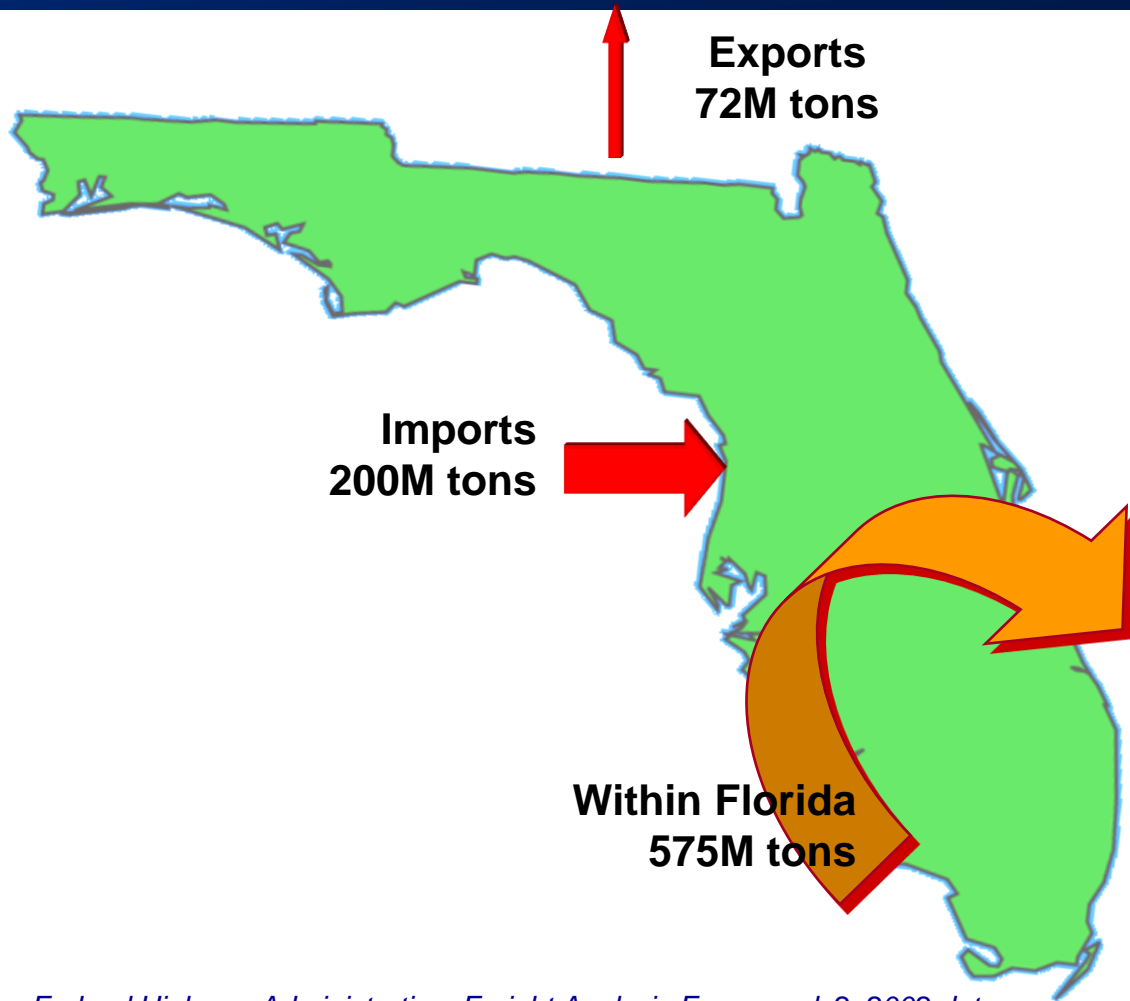
Passenger Movements Will Continue to Outpace Population Growth

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)



Most Freight Flows are Within Florida



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



Rising Demand for Freight Movement

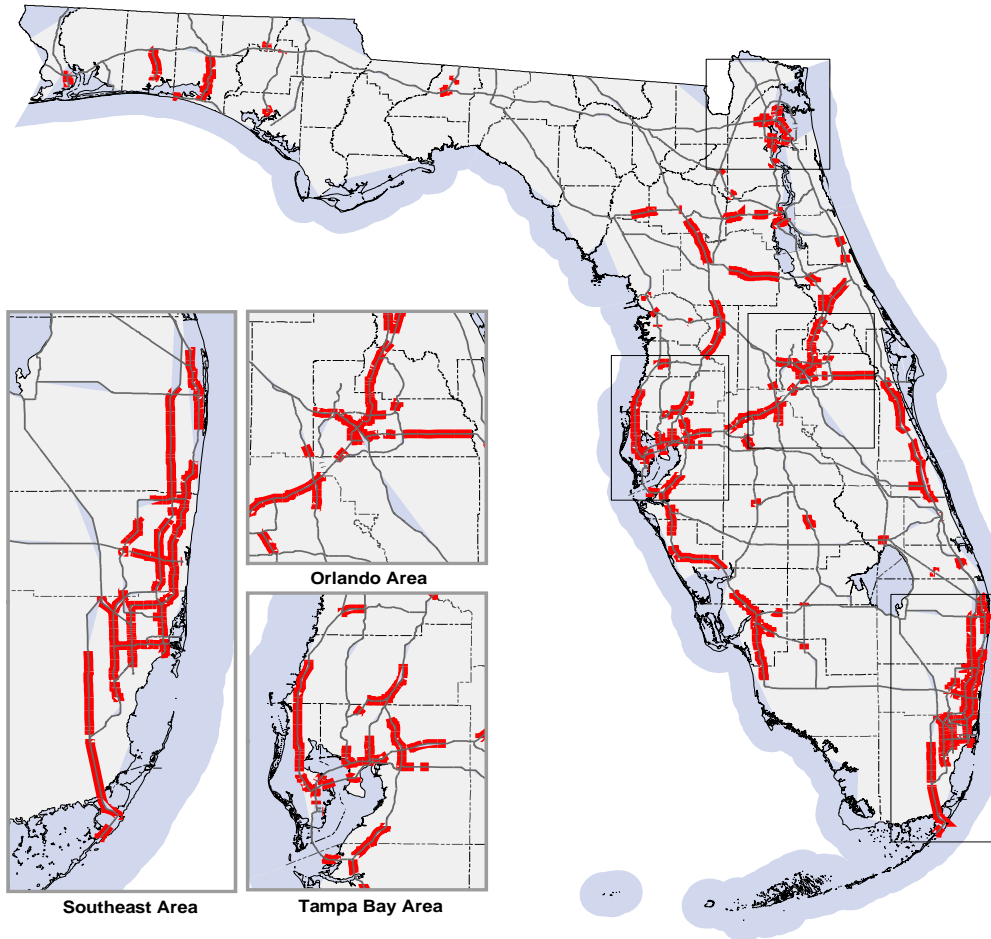
Freight Volume in Millions of Tons

Mode	1998 (Actual)	2001 (Estimate)	2025 (Forecast)	Change
Truck	562	629	1,163	85%
Rail	143	156	256	65%
Air	2	3	7	171%
Water	73	78	115	48%
Employment (millions)	6.9	7.4	11.2	51%

*Source: Federal Highway Administration, Freight Analysis Framework, 2002;
US Bureau of Economic Analysis;
DRI-WEFA, State Long-Term Tables, Fall 2002 Forecast*



Congested Corridors, 2005



SIS Highways Not Meeting Level of Service Standards in 2005

State of Florida
Department of Transportation

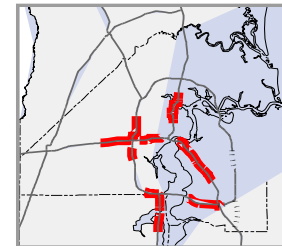
LEGEND

*Highways Not Meeting Standards as of Year 2005**

Other Facilities:

NOTES

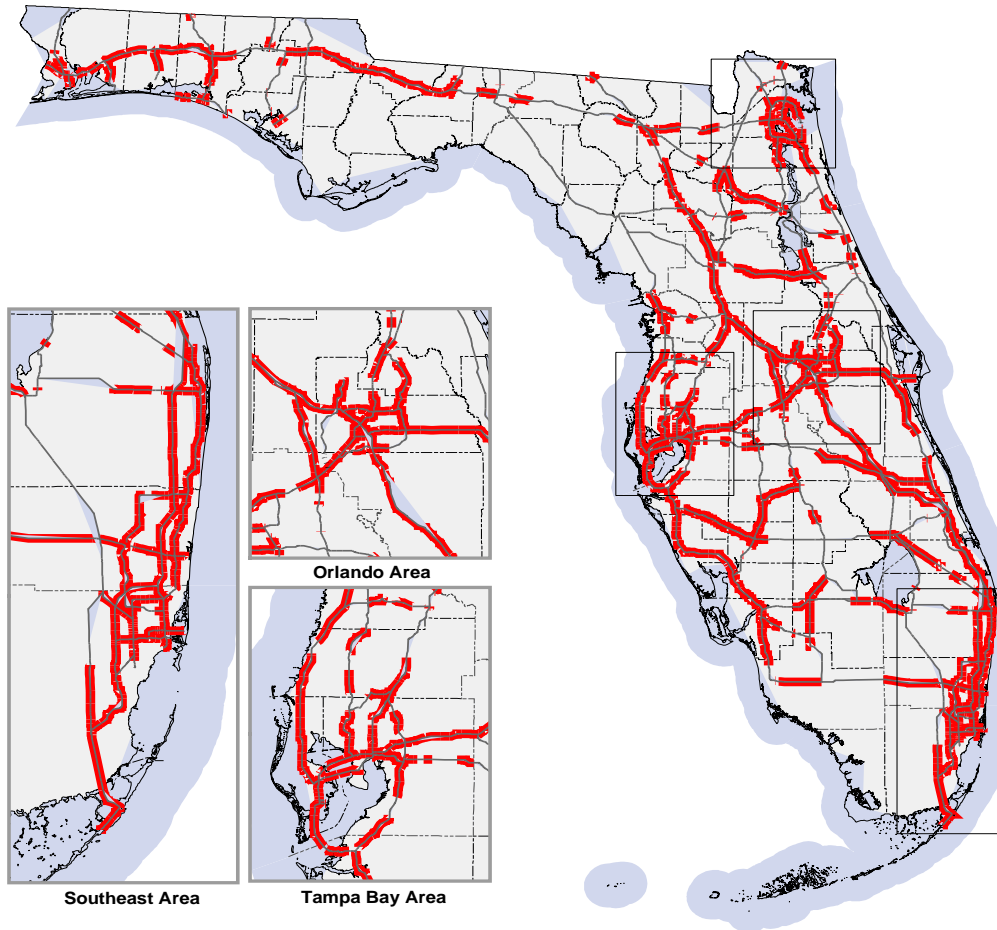
- * SIS Highways not meeting standards are defined as those facilities operating below FDOT's statewide minimum level of service standards as specified in "Rule Chapter No. 14-94".



Jacksonville Area



Congested Corridors, 2025



SIS Highways Not Meeting Level of Service Standards in 2025*

State of Florida
Department of Transportation

LEGEND

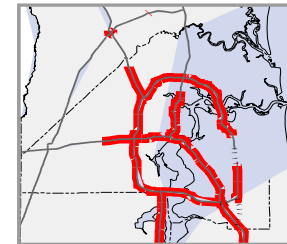
Highways Not Meeting Standards
as of Year 2025**

Other Facilities:

NOTES

* Includes lanes added as a result of constructing the Ten-Year Plan through 2015 with Growth Management funds and the FHHS 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".



Jacksonville Area



Florida's Seaports Face Challenges of Meeting Growth in Trade

- Improving capacity and productivity by investing in:
 - Waterside
 - Marine terminals
 - Highway and rail access
 - Linkages with inland facilities and markets
- Meeting environmental and security mandates
- Covering infrastructure and operating costs

State	TEUs (1983)	TEUs (2004)	Annual Growth, 1983-2004
Florida	563	2,669	7.7%
So. Carolina	320	1,864	8.8%
Virginia	223	1,852	10.6%
Georgia	216	1,662	10.2%
Texas	378	1,516	6.8%
Louisiana	256	276	0.4%
Mississippi	0	213	---
No. Carolina	61	104	2.6%
Alabama	31	37	0.9%

Source: American Association of Port Authorities



Airports Facing Capacity Constraints

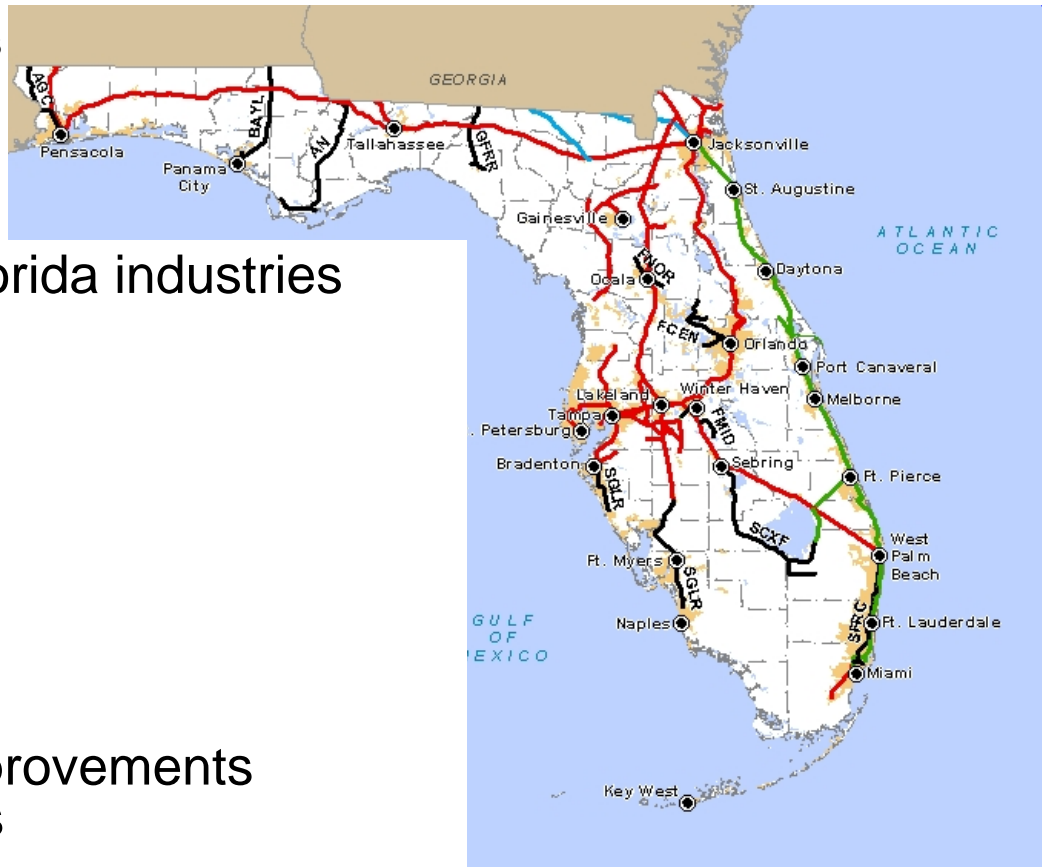


Source: Florida Aviation System Plan

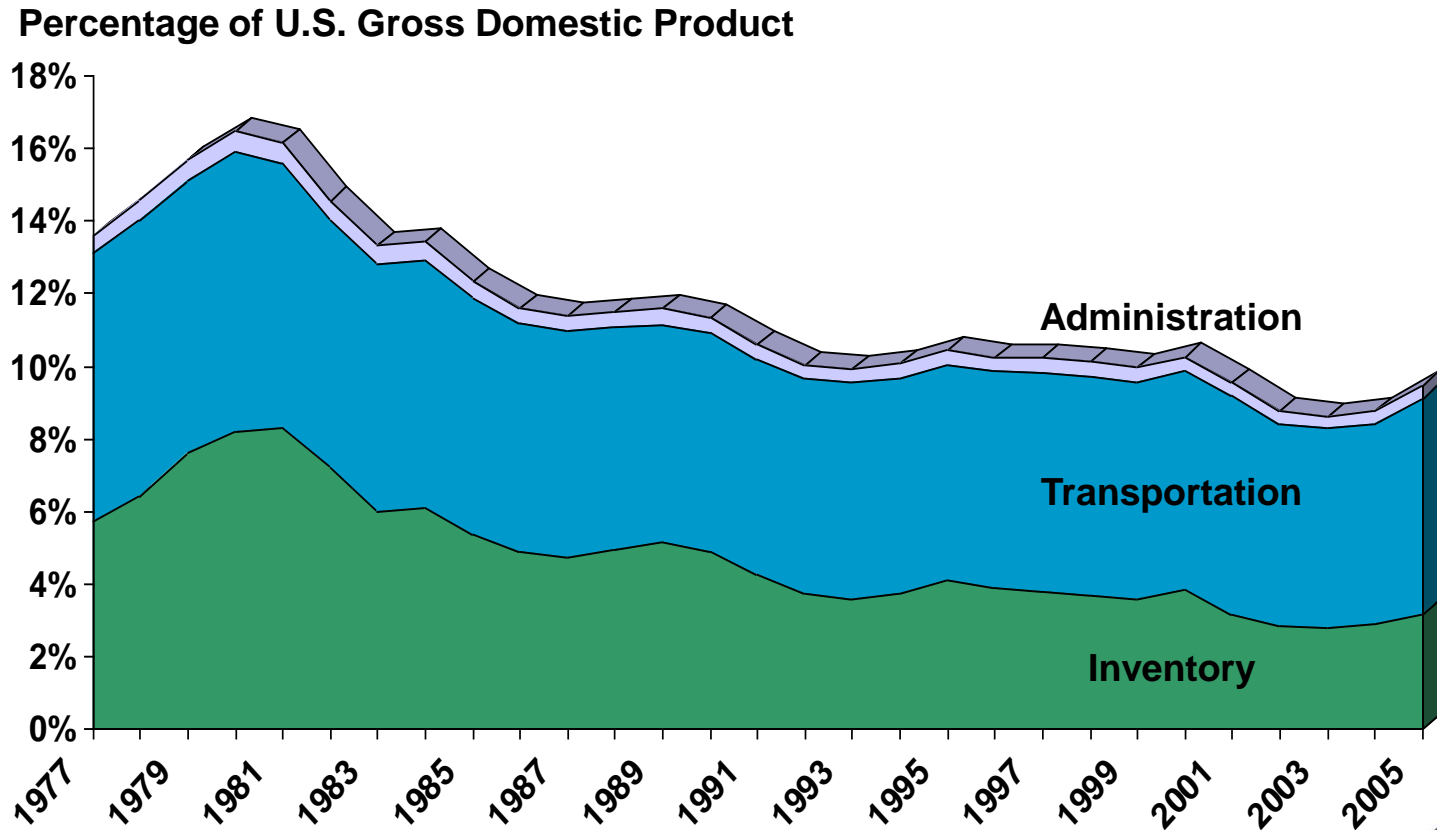


Rail is Critical to Effectively Moving Florida's Freight

- Over 2 million carloads of freight annually in Florida
 - Same as 6 million truckloads
 - 4th nationally in terminations
 - 7th nationally in originations
- Rail is critical to key Florida industries
 - Phosphate
 - Coal
 - Retail distribution
 - Food/agriculture
 - Paper/fiber
 - Automobiles
 - Construction
- High cost of capital improvements creates capacity issues



Will Total Logistics Costs Continue to Increase?

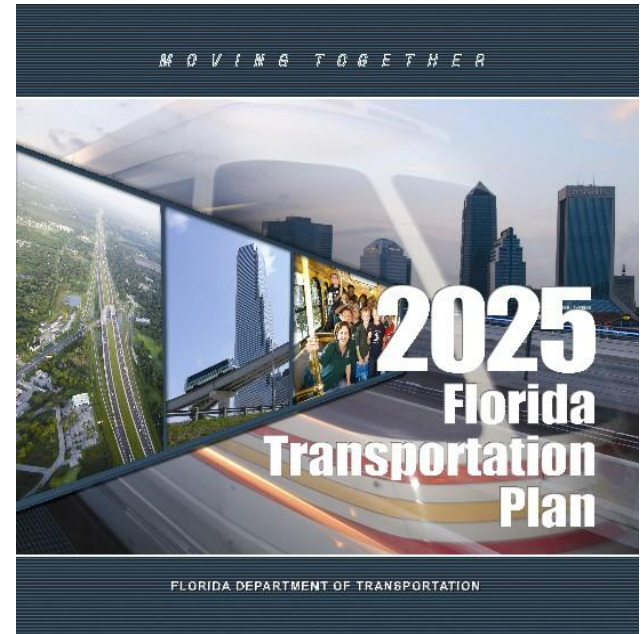


Source: State of Logistics Report, Council of Logistics Management, 2006



2025 Florida Transportation Plan

- Safety and Security
- Quality of Life and Environmental Stewardship
- Maintenance and Preservation
- Mobility and Economic Competitiveness
- Sustainable Investments



2025 FTP: Key Objectives and Strategies

Defining State's Role in Working with Modes

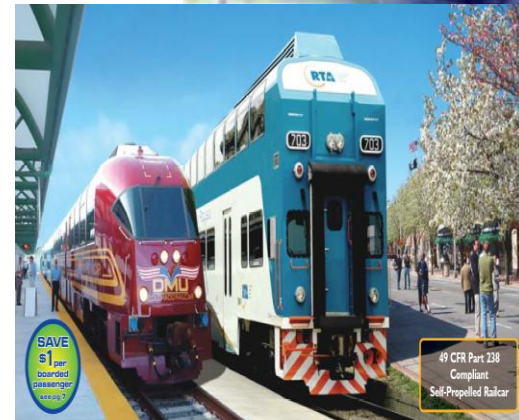
- Safety and Security
 - Improve safety of all modes
 - Improve ability to deter and respond to security incidents
 - Ensure access to military facilities
- Quality of Life and Environmental Stewardship
 - Protect seaports, airports, and other hubs from encroachment by incompatible land uses
 - Reduce impact of freight movement on communities
- Maintenance and Preservation
 - Protect existing infrastructure
 - Expand use of alternative modes for overweight loads



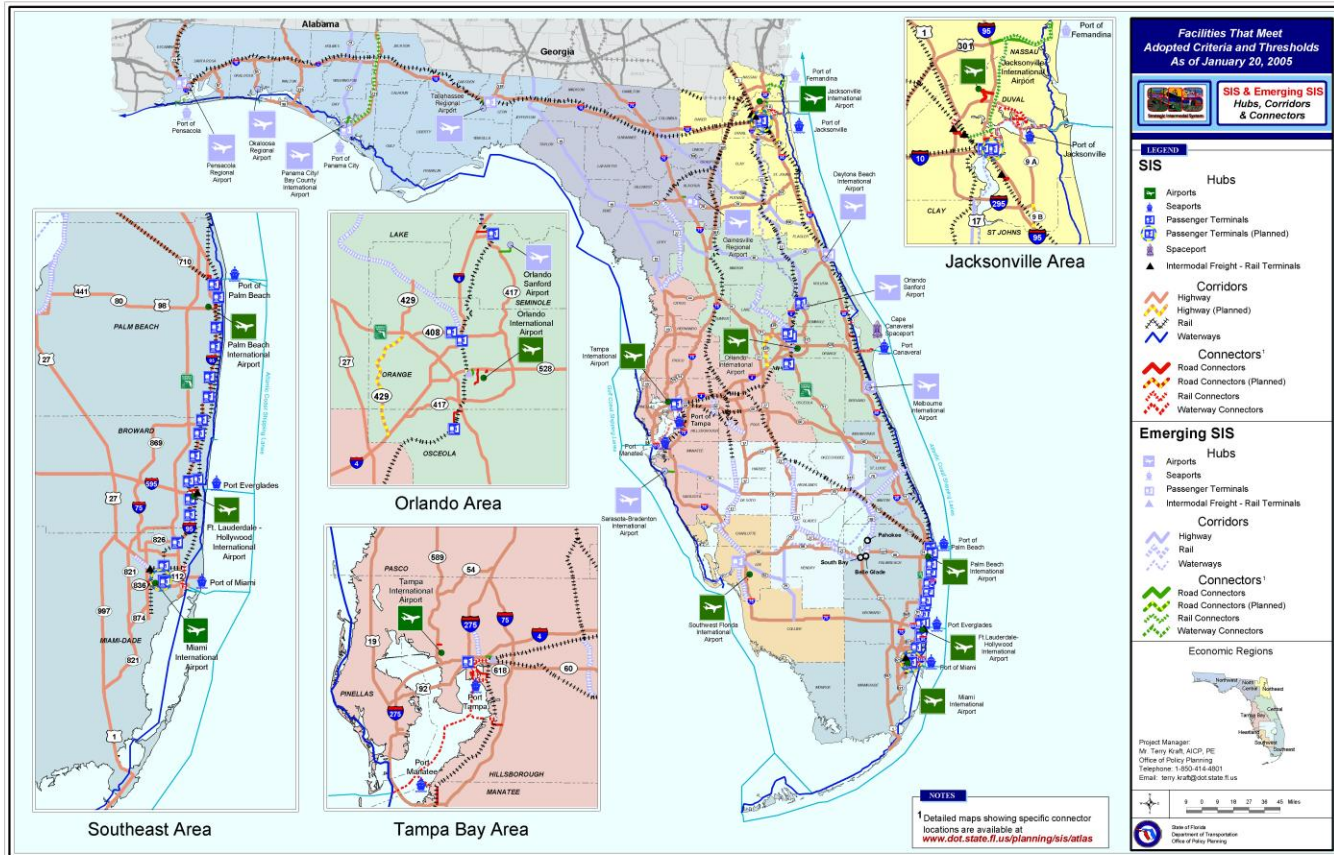
2025 FTP: Key Objectives and Strategies

A Stronger Economy Through Enhanced Mobility

- Where?
 - Hubs (ports and terminals)
 - Corridors (highways, rail, water)
 - Connectors between the modes
- How?
 - Optimize existing facilities
 - Expand modal options
 - Develop new hubs and corridors
- Key initiatives
 - Strategic Intermodal System
 - Passenger Rail and Transit Initiatives
 - Future Corridors



Strategic Intermodal System

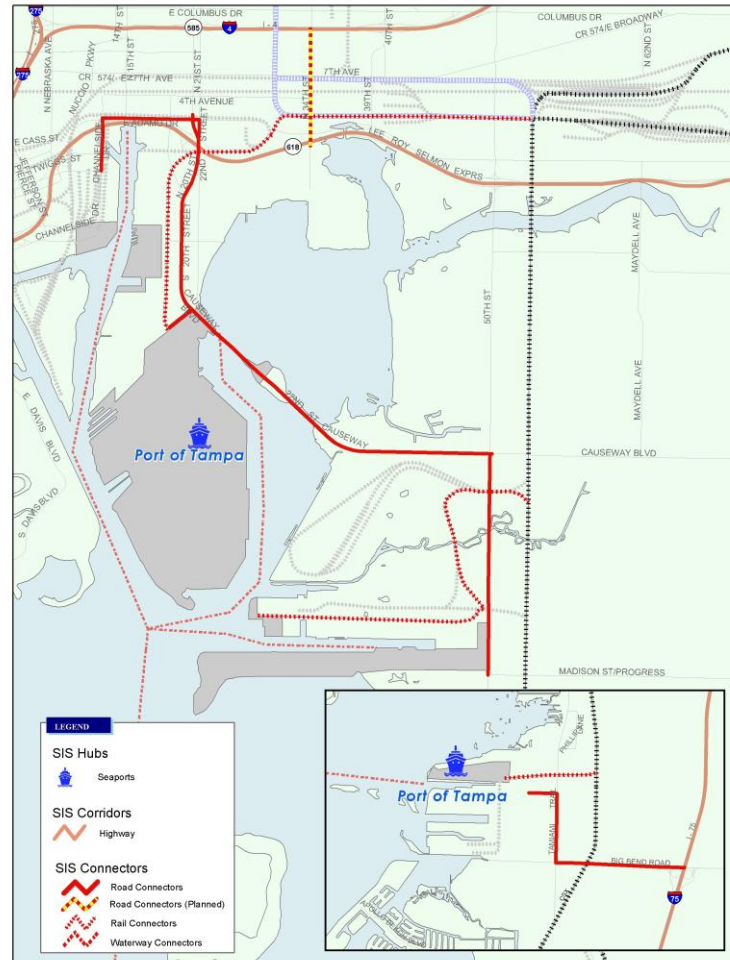


<http://www.dot.state.fl.us/planning/sis>



Example Port of Tampa

- New and expanding freight and passenger facilities
- New and improved connectors
 - Highway (Crosstown Connector)
 - Rail
 - Waterway



Passenger Rail Initiatives

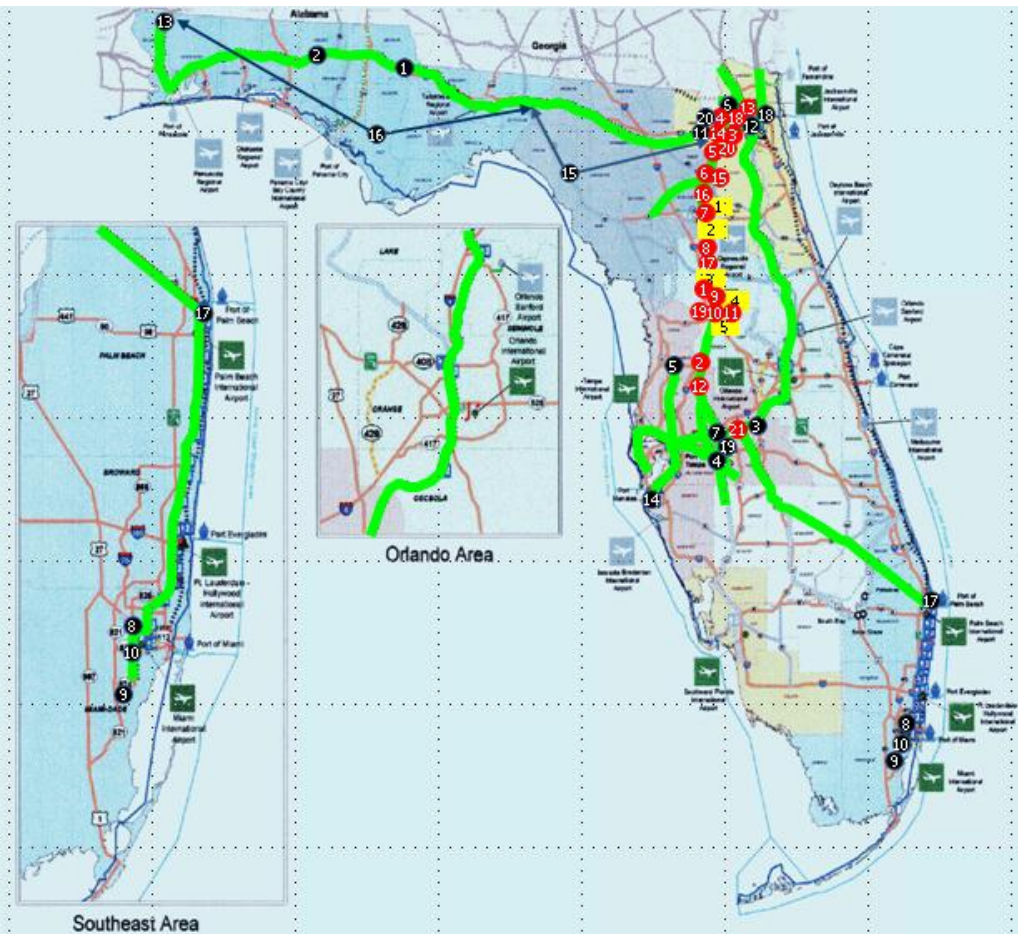


- Southeast Florida
 - Tri-Rail
 - FEC Passenger Rail
- Central Florida Commuter Rail
- Intercity Passenger Rail Vision Plan



Freight Rail Initiatives

- Major upgrades to CSX as part of Central Florida Commuter Rail Project
 - Shift freight from “A” Line through Orlando to “S” Line through Ocala
 - Statewide CSX Florida Improvement Plan



Freight Rail Initiatives

- Other freight rail improvements as part of Strategic Intermodal System and Growth Management Investments
 - 23 projects @ \$100M between FY05/06 and FY10/11
 - Projects to upgrade shortline railroads to handle industry standard railcars
 - Projects to provide passing opportunities
 - Bridge rehabilitation projects
 - Projects to improve rail operations
- Florida's investments in Freight Rail are consistent with AASHTO Rail Bottom Line recommendations targeted at helping the rail industry maintain mode share.



“New Starts” Transit Initiatives Projects with Local Funding Commitment

- Miami-Dade Transit
 - MIC/Earlington Heights
 - North Corridor
 - East-West Corridor
- Jacksonville BRT
- Central Florida Commuter Rail
- City of Miami Streetcar
- Ft. Lauderdale Downtown Light Rail



Vision for Florida's Future Statewide Corridors

- Florida's Future Corridors Program will develop and maintain a statewide, integrated network of multimodal, multiuse corridors that:
 - Address current and future statewide mobility and connectivity needs
 - Are connected to regional facilities that also serve local trips
 - Are developed in a manner that balances economic competitiveness and mobility needs with community livability and environmental stewardship
 - Are developed by a partnership of state agencies, statewide commissions and other statewide, regional, and local partners
 - Are financed through user fees to the maximum extent possible



Potential Corridor Transformation (Re-Use) Study Areas



Important Note: These specific study areas, boundaries, and facilities may change or be deleted, and others may be added, based on additional information.

Potential New Corridor Study Areas



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Recommended Prototype Studies

- Transformation/re-use of existing corridor
 - Multimodal corridor – *I-95 Miami-Dade County to Georgia State line*
- New corridors
 - Interstate corridor – *Bay County-Alabama*
 - Interregional corridor – *Hillsborough County-Duval County*
 - Economically distressed/developing area – *Collier County-Polk County*
- Selection based on:
 - Urgency of mobility or connectivity need
 - Status of visioning activities
 - Partner readiness to move forward
 - Geographic distribution



Investing in Florida's Future

Economic Impacts of FDOT Work Program

Benefits (2006 dollars)	2010	2020	2030
Personal Income	\$3,254	\$5,255	\$6,749
Gross State Product	\$3,361	\$6,136	\$7,554
Output	\$5,534	\$9,677	\$11,781
Employment	43,165	64,114	67,930



Source: FDOT Macroeconomic Analysis Model

2025 FTP: Key Objectives and Strategies

Sustainable Investments for Florida's Future

- Reduce backlog and meet future needs
- Set investment priorities; recognize strategic and essential role of SIS
- Seek alternative revenues sources
 - User fees
 - Public/private partnerships



What's Next

- SIS designation update
 - Annual data review to be completed spring 2007
 - Next comprehensive update beginning in 2008
- Future Corridor implementation
 - 4 prototypes to begin in 2007
- 'Future hubs'
 - Major expansions to existing hubs
 - Some relocations (new Panama City/Bay County Airport)
 - New types of hubs (inland ports, commercial spaceports)



Summary: How Does Florida Compete?

From...	To...
Moving vehicles	Moving people and freight (and sharing information)
Individual modes and facilities	Complete end-to-end trip
Individual jurisdictions	Economic regions and trade corridors
Physical capacity	Operational performance, flexibility, and reliability
Travel time and vehicle operating costs	Business logistics and economic competitiveness
Reacting to economic growth and community and environmental impacts	Proactive planning for economic, community and environmental goals



For More Information

www.dot.state.fl.us/planning

