

UPDATING THE FLORIDA TRANSPORTATION PLAN: **EMERGING TRENDS**



MAY 2019



9 OUT OF 10

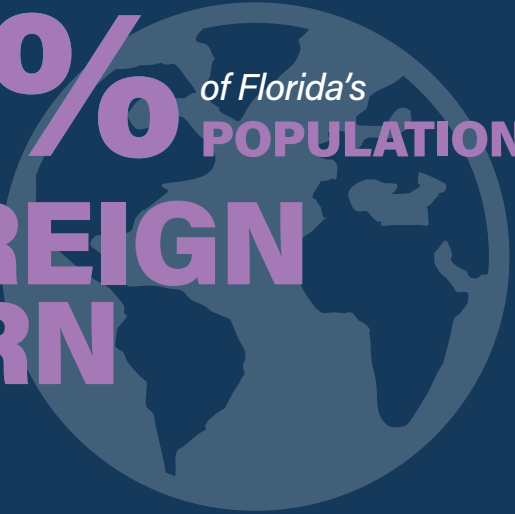
FLORIDIANS

live in URBAN AREAS



20% of Florida's POPULATION

is FOREIGN BORN



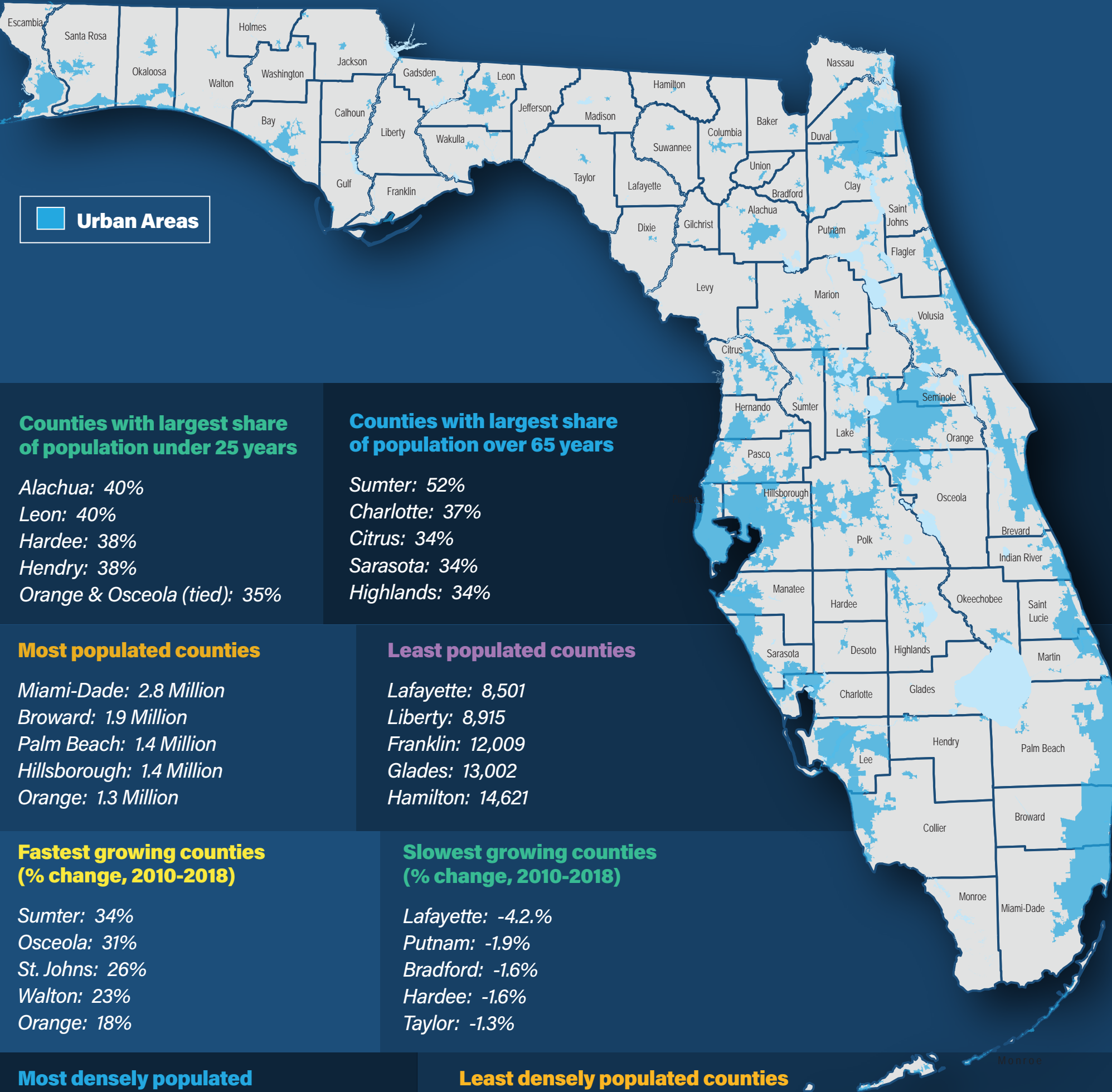
6.9%

of Florida's households are

LIMITED ENGLISH SPEAKING



FLORIDA'S URBAN AREAS



Counties with largest share of population under 25 years

- Alachua: 40%
- Leon: 40%
- Hardee: 38%
- Hendry: 38%
- Orange & Osceola (tied): 35%

Counties with largest share of population over 65 years

- Sumter: 52%
- Charlotte: 37%
- Citrus: 34%
- Sarasota: 34%
- Highlands: 34%

Most populated counties

- Miami-Dade: 2.8 Million
- Broward: 1.9 Million
- Palm Beach: 1.4 Million
- Hillsborough: 1.4 Million
- Orange: 1.3 Million

Least populated counties

- Lafayette: 8,501
- Liberty: 8,915
- Franklin: 12,009
- Glades: 13,002
- Hamilton: 14,621

Fastest growing counties (% change, 2010-2018)

- Sumter: 34%
- Osceola: 31%
- St. Johns: 26%
- Walton: 23%
- Orange: 18%

Slowest growing counties (% change, 2010-2018)

- Lafayette: -4.2%
- Putnam: -1.9%
- Bradford: -1.6%
- Hardee: -1.6%
- Taylor: -1.3%

Most densely populated counties (people per square mile)

- Pinellas: 3,542
- Broward: 1,569
- Seminole: 1,500
- Orange: 1,495
- Miami-Dade: 1,464

Least densely populated counties (people per square mile)

- Liberty: 11
- Lafayette: 16
- Glades: 16
- Taylor: 21
- Franklin: 22

REGIONAL & LOCAL

NOW

Florida's **NONFARM EMPLOYMENT** was just under **9 MILLION JOBS** in March 2019

Florida's 2017 median **HOUSEHOLD INCOME** was **\$50,883**

14% of Florida households lived **BELOW THE POVERTY LINE** in 2016

Florida's **UNEMPLOYMENT RATE** was **3.4%** IN FIRST QUARTER 2019

7% of households in Florida **DO NOT OWN A VEHICLE** while another **29%** own only **ONE VEHICLE**

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

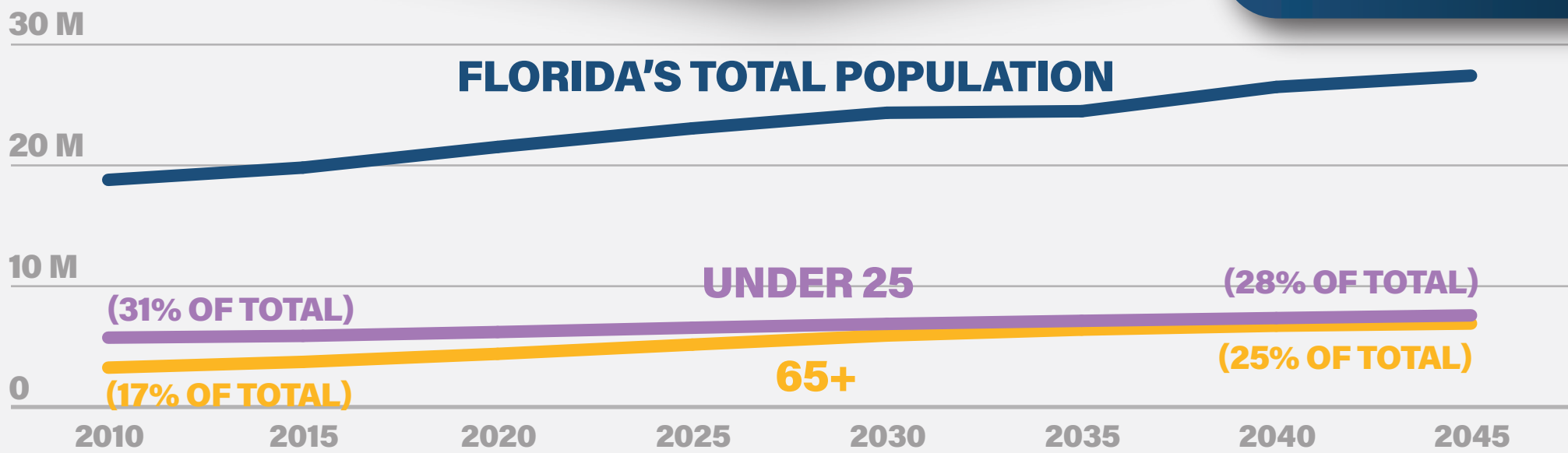
20% of Floridians have a commute time **UNDER 15 MINUTES**
18% of Floridians have a commute time of **45 MINUTES OR LONGER**

TRANSPORTATION CHOICES

Motorcycle Endorsements 2011-2016 +22%	Walked to Work 2011-2016 +/-0%	Transit Miles of Service 2011-2015 +8%	Average Commute Time 2011-2017 +7%
Bicycling to Work 2011-2016 +16%	Interregional Rail Passengers (SunRail/Tri-Rail) 2011-2017 +31%	Working from Home 2011-2016 +26%	Total Population 2011-2017 +8%

74% of Florida's total **VEHICLE MILES TRAVELED (VMT)** is for **SCHOOL, SHOPPING, RECREATION, OR SOCIAL PURPOSES**

NEXT



67% of Florida's **POPULATION GROWTH** between 2018 and 2045 is projected to be concentrated in **10 COUNTIES**

[Miami-Dade, Orange, Hillsborough, Broward, Palm Beach, Lee, Duval, Polk, Osceola, & Manatee]

Florida's **65+ POPULATION** is projected to **GROW BY 73%** by 2045

67% OF AGING ROAD USERS (age 65+) are **OUTLIVING THEIR ABILITY TO DRIVE** by an average of **7-10 YEARS**

Florida is projected to add **700 PEOPLE EVERY DAY** for the next **25 YEARS**

INCREASING DIVERSITY (PROJECTED GROWTH BY RACE)

Non-Hispanic White	+12%
Non-Hispanic Black	+57%
Hispanic	+102%
Other	+66%

STATE & INTERREGIONAL

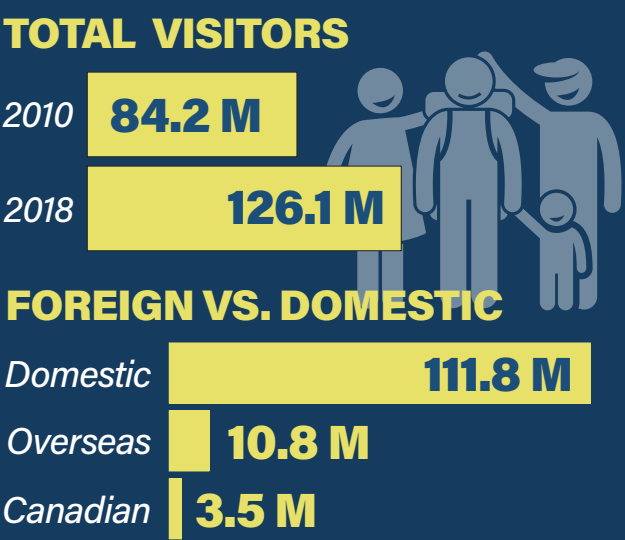
NOW

Florida has GDP of just over **\$1 TRILLION** ranking **4TH** among all states

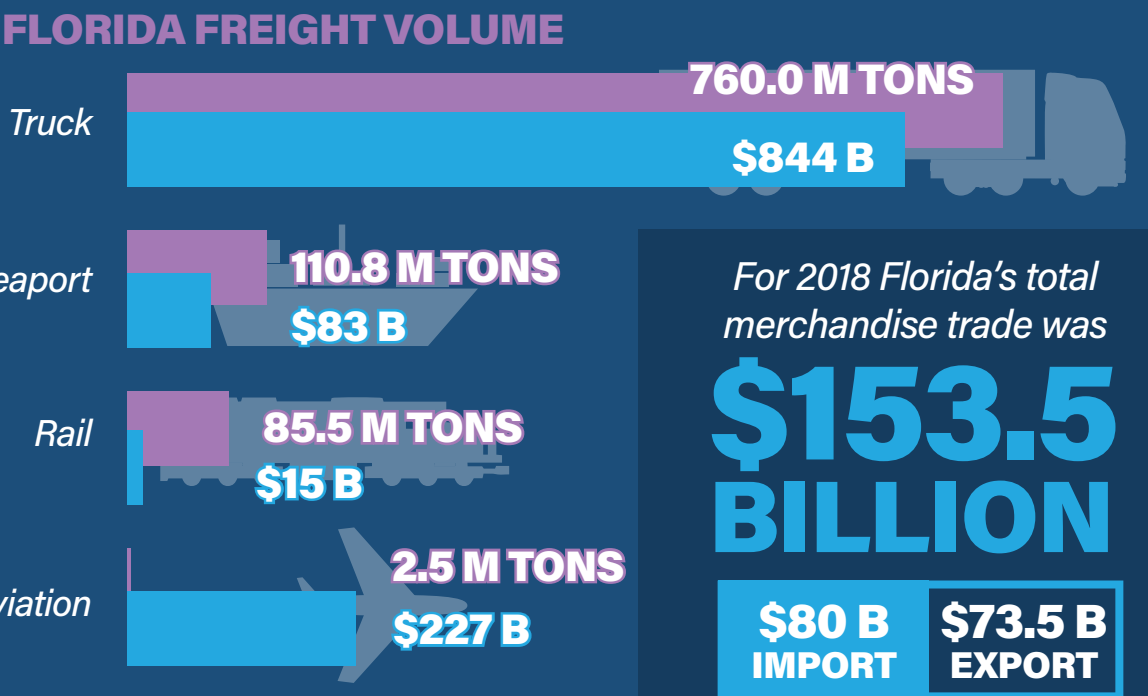
If Florida were an independent country, it would rank **17TH** in the world

Florida has a population of **20.8 MILLION** today, ranking **3RD** among the states

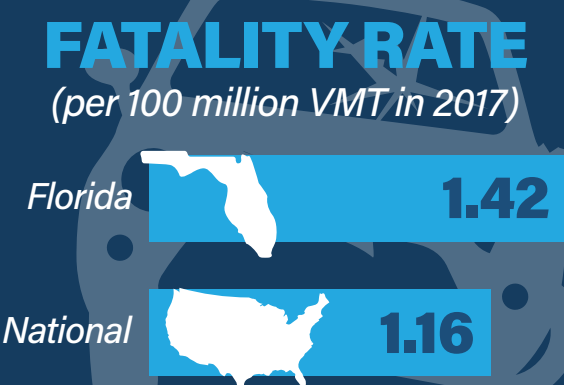
MIGRATION from other states and nations accounted for **89%** of **POPULATION GROWTH** between 2010 & 2017



1/2 of Florida's visitors **ARRIVE VIA AIR**



Florida is home to **22** U.S. military bases with more than **56,000** active military personnel



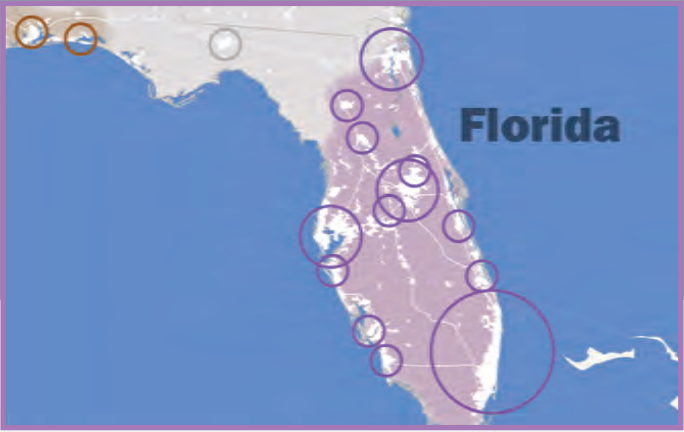
Florida manufacturers employed **354,000 WORKERS** in 2016, producing **\$45 BILLION** IN OUTPUT

Florida's population is projected to grow from **20.8 MILLION** in **2018** to **26.5 MILLION** residents in **2040**

An increase of **27%**

As Florida's urban areas continue to expand and develop business linkages, the entire peninsula is expected to become **ONE INTEGRATED MEGAREGION** by the year 2050

Florida could be **1 OF 10 MEGAREGIONS** anticipated to **DRIVE U.S. POPULATION & ECONOMIC GROWTH** through 2050



NEXT

The total number of **OUT-OF-STATE VISITORS** to Florida is projected to **INCREASE 42%** between 2018 and 2028

Statewide partners have set a target to **DOUBLE GOODS EXPORTS & TRIPLE SERVICES EXPORTS** by 2030

RESILIENCE

NOW

Florida has a **HIGHER FREQUENCY OF TORNADOES** per 10,000 square miles **THAN ANY OTHER STATE**

There are **14.5 MILLION PEOPLE** living in Florida's **COASTAL COUNTIES**

3 OUT OF 10

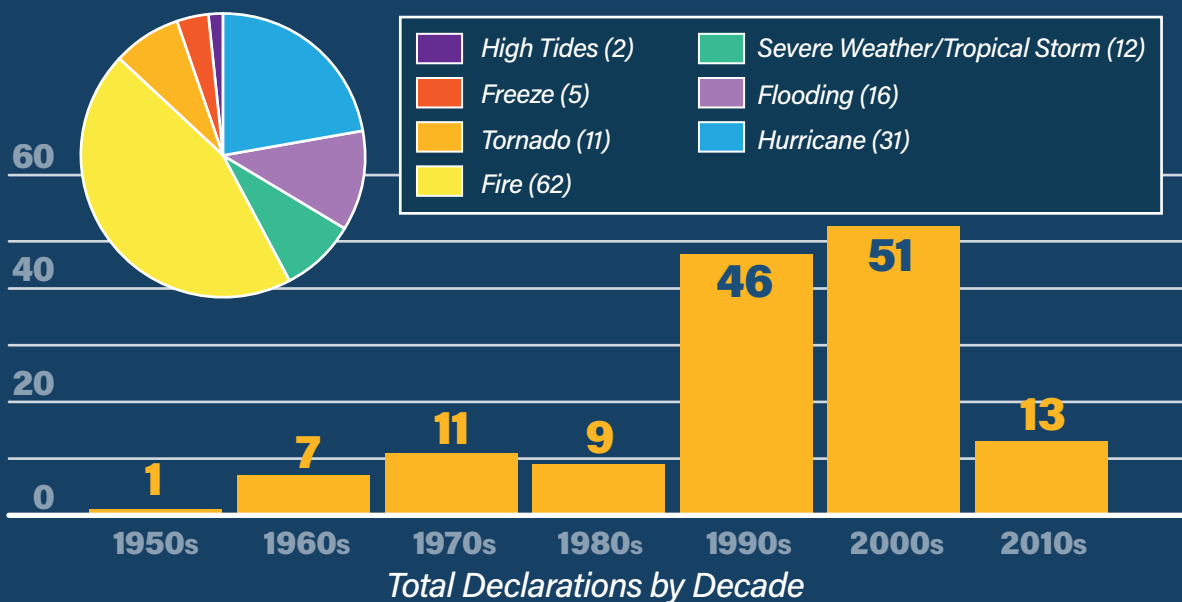
for the general population

Florida regions have a **SHORTAGE OF SHELTER SPACE**

9 REGIONS

have a shortage of shelter space for **SPECIAL NEEDS POPULATIONS**

FEDERAL EMERGENCY MANAGEMENT AGENCY EMERGENCY DECLARATIONS



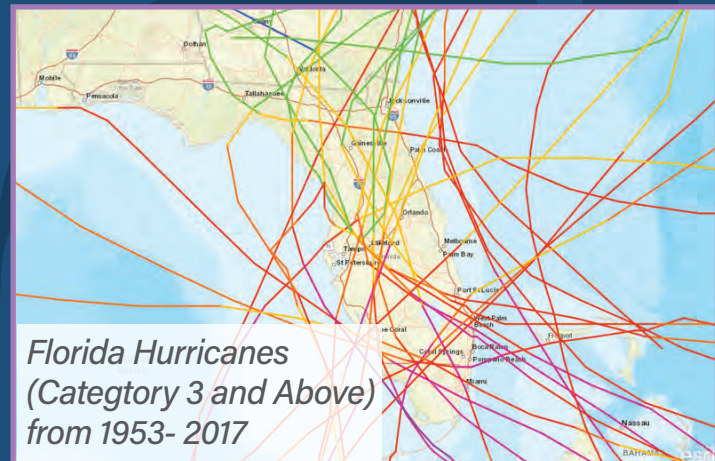
HURRICANE MICHAEL

October 2018

35 counties evacuated

375,000 residents affected

\$5.8 BILLION in estimated insurance loss



HURRICANE IRMA

September 2017

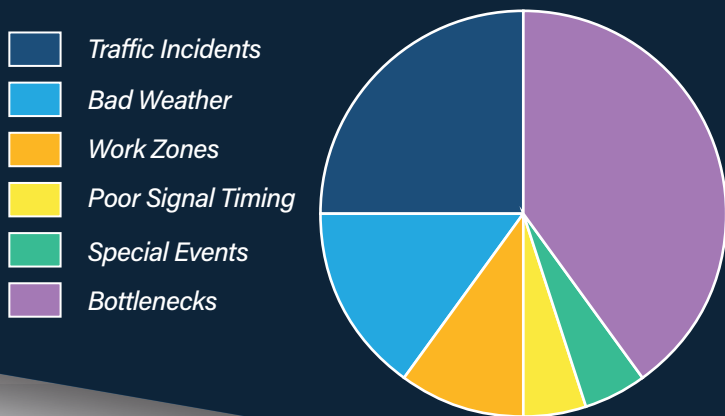
54 counties evacuated

6.8 MILLION residents affected

\$11.1 BILLION in estimated insurance loss

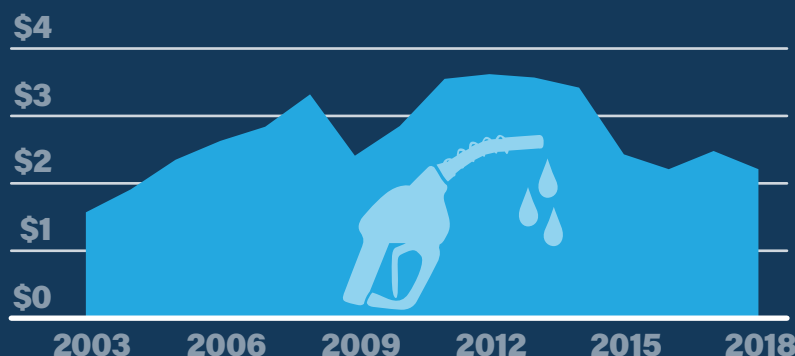
Since 2000, **TIDAL FLOODING** across Florida has **INCREASED BY 352%**, while sea levels have risen approximately **3 INCHES**

SOURCES OF CONGESTION



Nationwide, **INCIDENTS, WEATHER, CONSTRUCTION, AND OTHER SPECIAL EVENTS** account for **55% OF CONGESTION**

AVERAGE ANNUAL FUEL PRICES IN FLORIDA



The Florida Chamber Foundation's recession risk index projects a

21% risk of beginning a **RECESSION** in the next 9 months

CURRENT U.S. EXPANSION

has lasted 118 months and counting, more than **TWICE THE AVERAGE TIME BETWEEN RECESSIONS** since World War II

More than

1/2

OF ALL JOBS COULD BE AUTOMATED TODAY using current technologies

Up to **85% OF ALL JOBS** in 2030 could be in industries or occupations that **DO NOT EXIST TODAY**

NEXT

SEA LEVELS in Southeast Florida are projected to **RISE** from 2018 levels by a median amount of **2.5 INCHES** by 2030 & **10.5 INCHES** by 2060

The increasing

GLOBAL INTEGRATION of Florida's economy means our **TRADE, TOURISM, AND OTHER INDUSTRIES**

can be impacted by recessions, instability, and supply chain disruptions around the world



Statewide partner studies of potential future development in the year 2070 project between

3.5 MILLION & 5.4 MILLION ACRES of **ADDITIONAL LAND** could be developed

Similar regional visioning initiatives have demonstrated a **RANGE OF ASSUMPTIONS** about future growth



TECHNOLOGY

NOW

More Floridians

WORK FROM THEIR HOMES
than **USE PUBLIC TRANSIT**
for their commute to work



Globally, there are

20X

the number of
TELEMEDICINE
PATIENTS

than just five years ago



33%

of college students
take at least
ONE COURSE
ONLINE



78%

of Florida households have access to
BROADBAND INTERNET

80%

of households in
urbanized areas



64%

of households in
rural areas



E-commerce accounts for

64%

of all manufacturing
shipments



The number of
SHARED
VEHICLE TRIPS

has

INCREASED

10X

in the last

5 YEARS



2,500,000,000,000,000,000

(2.5 QUINTILLION)
BYTES OF DATA

are created each day,
and the pace is **accelerating**



Over the last
two years alone,

90%

of the **DATA IN**
THE WORLD
were generated

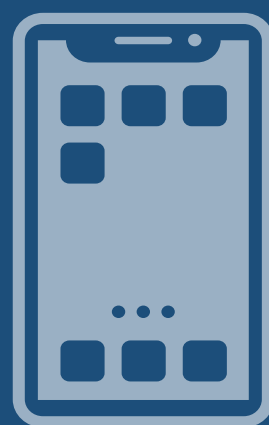
More than

75%

of the **WORLD'S**
POPULATION

owns a

SMARTPHONE



The implementation of

FULL AUTONOMY

throughout the motor carrier freight system could

REDUCE TOTAL
OPERATING COSTS

by up to

45%

an estimated savings of at least

\$85 BILLION



Nationally,

FULLY ELECTRIC VEHICLES

are projected to represent

8%

of total automobiles sold by 2025



The global market for

CONNECTED CARS is expected to grow

270%

by 2022



NEXT

5G will provide

10X FASTER

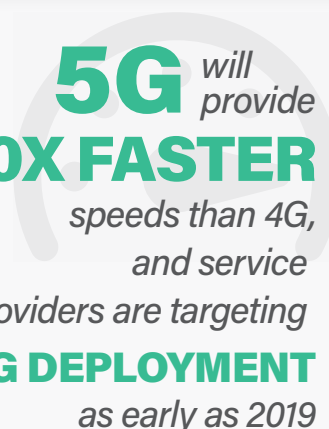
speeds than 4G,

and service

providers are targeting

5G DEPLOYMENT

as early as 2019



Advances in **3D PRINTING** could disrupt freight by as much as:

41%

of
Air Cargo

37%

of
Ocean Freight

25%

of
Truck Freight

(Loss in Annual Value)



By 2020, it is estimated that more than

40 TRILLION
GIGABYTES
OF DATA

will be
generated annually



Amazon's Prime

AIR SERVICE

will deliver packages to
addresses within a

10 MILE RADIUS

of an Amazon
fulfillment center in

30 MINUTES

or less

Airships stocked with
products could act as

AIRBORNE
WAREHOUSES

to streamline

DRONE DELIVERY



The

HYPERLOOP CONCEPT

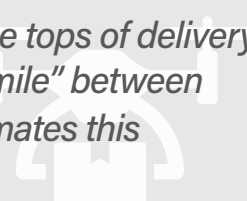
could be capable of traveling at speeds up to

700 MPH, reducing a 6 hour drive to 35 minutes



UPS

is testing **DRONES**, deployed from the tops of delivery
vehicles, to navigate the "first-mile/last-mile" between
their vehicles and a customer's door; the company estimates this
will save up to **\$50 MILLION/YEAR**





OFFICE OF POLICY PLANNING

Dana Reiding

Florida Department of Transportation
605 Suwannee Street, Mail Station 28
Tallahassee, Florida 32399-0450

850-414-4800 // planning@dot.state.fl.us

www.floridatransportationplan.com

Data sources available at
<http://floridatransportationplan.com/trends-sources.pdf>