a pocket guide to









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

- The growing demand for transportation facilities and services;
- The current system or supply of transportation;
- The impacts of the transportation system on our society; and
- The resources, expenditures and costs associated with providing transportation.

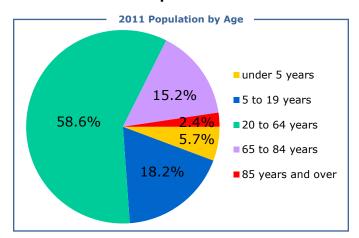
We hope you find this publication helpful. Extensive additional information on trends and conditions regarding transportation in Florida is available at:

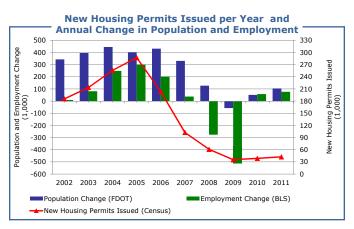
www.dot.state.fl.us/planning/trends

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Population







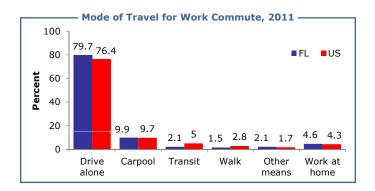
Population

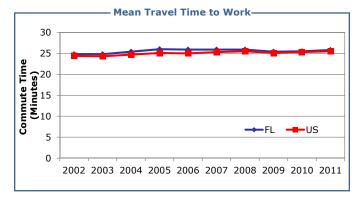
- With over 18.9 million people, Florida retains its rank as 4th largest state in the U.S., trailing New York by less than one-half million residents.
- Florida's population growth in 2010–2011 was over 104,000. Approximately 40.5% of this growth was natural growth with the remaining attributable to immigration and migration.
- Between 2000 and 2011, Florida's population increased 1.7% per year and about 18.3% overall. The vast majority of the growth occurred in the 2000-2007 time period.
- From 2010 to 2011, Suwannee County had the highest growth (+4.0%), followed by Gadsden County (+3.9%), Sumter County (+3.4%), Santa Rosa County (+2.3%) and Osceola County (+1.9%).
- From 2010 to 2011, three counties experienced no overall change in population: Duval, Alachua and Columbia and 21 counties experienced an overall loss with the highest being Lafayette (-1.3%) and Washington (-1.0%).
- By 2040, over 24% of Florida's population is projected to be 65 and older, compared with 17.6% in 2011 and 14.6% in 1970.
- In 2011, Florida issued 42,360 new housing permits, 9.5% above 2010.

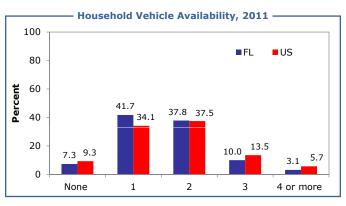
Sources: U.S. Census Bureau; U.S. Department of Labor, Bureau of Labor Statistics (BLS); Bureau of Economic and Business Research, University of Florida

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Travel Behavior of Floridians







Travel Behavior of Floridians

The 2011 American Community Survey found:

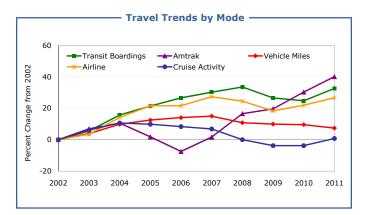
- Nearly 90% of Florida workers commuted to work by automobiles, approximately 3 percent higher than the national average.
- In Florida, transit carried 2.1% of commuter trips, compared with the national average of 5%.
- Walking was a less common means of commuting in Florida (1.5%) than nationally (2.8%).
- Average commute time increased 0.3 minutes for Florida and 0.2 minutes nationally.
- About 32.9% of Florida households had no workers. The national share was over 27.5%.
- The share of the workforce working at home remained similar from 2010 with 4.6% in Florida and 4.3% nationally.
- The share of households in Florida with no cars rose to 7.3% from 7% in 2010, remaining below the national level of 9.3%.

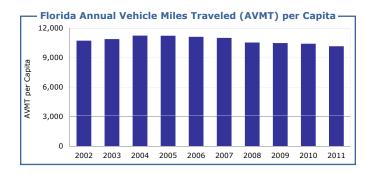


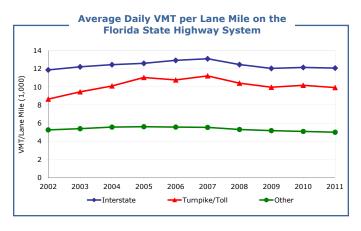
Source: U.S. Census Bureau, American Community Survey; Florida Department of Transportation (FDOT)

travel demand travel demand

Travel Levels





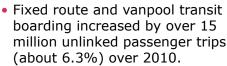


Travel Levels

In 2011:

 Vehicle Miles Traveled (VMT) in Florida decreased by 1.1%. The overall decrease was attributable to depressed economic conditions, reduced freight travel, high fuel prices and travelers choosing other modes or substituting communications for travel.







 Amtrak ridership was up 7.5% while cruise activity increased 4.7% from 2010.



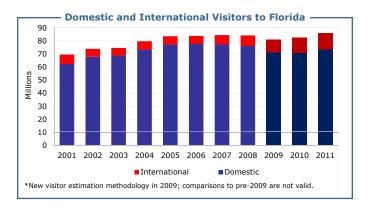
- Florida airports experienced over 69.3 million enplanements, an increase of 4% from 2010.
- VMT per lane mile is an indicator of the intensity of highway use. While it increased through 2007, travel per lane mile on the State Highway System declined from 2008 to 2011.
- Total licensed drivers decreased by 0.3%. Passenger car, truck and motorcycle registrations went down about 1.7%.

Source: FDOT; Florida Department of Highway Safety and Motor Vehicles: Amtrak: Florida Ports Council: Federal Aviation Administration

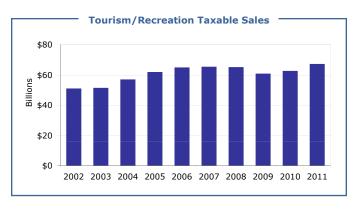
Note: Annual VMT based on FDOT daily VMT times number of days per year.

travel demand travel demand

Tourism and Travel







Tourism and Travel

In 2011:

- Florida hosted 87.3 million visitors/tourists, an increase of 5 million or about 6.1% over 2010.
- Domestic visitors to Florida outnumbered international visitors by nearly 6 to 1.
- There were approximately 4.6 visitors to the state for every resident.
- About 52% of all visitors to Florida arrived by air.
- Taxable spending in tourism/recreation reached about \$67.2 billion, up by approximately 7.2% from 2010.
- The tourism industry directly employed about 1,013,100 persons, over 5% more than in 2010.
- There were over 13.5 million cruise revenue passengers in fiscal year (FY) 2011, with:
 - Port of Miami at over 4 million,
 - Port Everglades at nearly 4 million, and
 - Port Canaveral at 3.1 million passengers

Source: VISIT FLORIDA, Florida Visitor Study

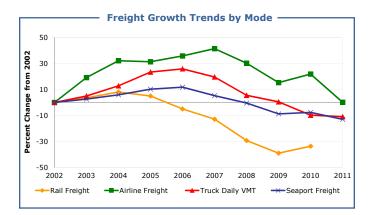
Note: Cruise passenger data reported by respective port authority.

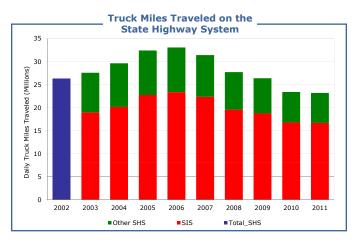




travel demand travel demand

Freight and Commerce







Freight and Commerce

The diversity of freight modes in Florida reflects both the variety of products generated and consumed in Florida and the availability of alternative modes for freight shipment.

 Non-metallic mineral freight comprised 54% of total originating rail freight tonnage in 2010. The fluctuation in rail freight tonnage over the years was mostly due to the changing market conditions for non-



metallic industries like phosphate.

- In 2011, Truck Miles Traveled (TMT) on the entire State Highway System decreased nearly 1.2% from 2010. On the Strategic Intermodal System (SIS), TMT declined about 1%.
- Truck travel remained at approximately 10% of vehicle miles traveled on the SIS in 2011.
- Waterborne cargo in Florida increased to \$82.7 billion in trade value in 2011, an 18.6% increase from 2010.
- The slow economy and low activity levels in residential and other construction activities have contributed to declines in freight volumes in Florida.

Source: FDOT; Florida Ports Council; Association of American Railroads

Strategic Intermodal System

The following table summarizes the current quantity of facilities on the SIS, as well as the estimated percentage of trips using SIS facilities.

Strategic Intermodal System Facilities				
Facility Type	SIS	Emerging SIS		
Commercial service airports Percent of all Florida enplanements Percent of all Florida air cargo tonnage	7 93% 98%	10 6% 1%		
General aviation reliever airports	1	0		
Spaceports Percent of all launch activity	2 100%	0 0%		
Deepwater seaports Percent of all waterborne freight tonnage Percent of all home-port cruise passengers	7 97% >99%	4 2% <1%		
Rail freight terminals Percent of all intermodal rail freight tonnage	5 85%	2 15%		
Interregional passenger terminals Percent of all interregional passengers	26 82%	9 7%		
Rail corridors Percent of all interregional rail passengers Percent of all freight rail tonnage	1,701 mi 100% >90%	420 mi 0% <10%		
Waterways Percent of all waterborne freight on coastal and international shipping routes	1,950 mi 100%	312 mi 0%		
Percent of all waterborne freight on inland interregional waterways	55%	11%		
Highways Percent of vehicle miles traveled on SIS Percent of truck miles traveled on SIS	3,603 mi 54% 70%	762 mi		
All Connectors	542			

Note: Data as of November 2012. Includes Planned Add SIS and Planned Add Emerging SIS in the totals.

Strategic Intermodal System

Florida's Strategic Intermodal System:

- Consists of statewide and regionally significant facilities and services - Strategic;
- Contains all forms of transportation for moving both people and goods, including linkages for smooth and efficient transfers between modes and major facilities - Intermodal; and
- Integrates individual facilities, services, forms of transportation (modes) and linkages into a single, integrated transportation network -System.

The SIS was established to:

- Efficiently serve the mobility needs of Florida's citizens, businesses and visitors; and
- Help Florida become a worldwide economic leader, enhance economic prosperity and competitiveness, enrich quality of life and reflect responsible environmental stewardship.



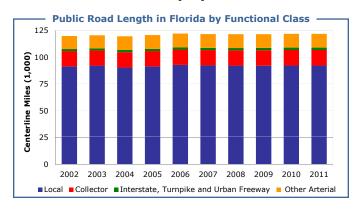


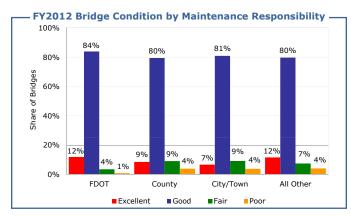


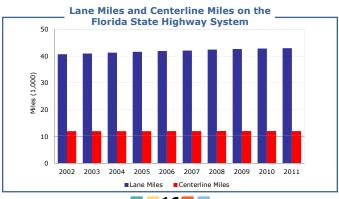
Source: FDOT



Roadway System







Roadway System

- Florida has 121,759 centerline miles of public roads, up 57 miles since 2010.
- Lane miles on the State Highway System has grown less than 1% since 2010.
- Urban and rural roads functionally classified as "local" comprise approximately 76% of the public road centerline miles.
- Since 2000, Florida has added over 5,000 centerline miles (4.6%) to its roadway system.
- The State Highway System is less than 10% of the entire Florida roadway network, but carries over 54% of all daily traffic.
- FY 2011 fuel tax revenues increased due to Florida's indexed fuel tax rates, more than offsetting the decline in vehicle miles of travel.
- FDOT maintains around 56% of the 11,987 bridges in Florida while local governments and other organizations are responsible for the others.
- About 96% (6,369) of the state-maintained bridges are in excellent or good condition.

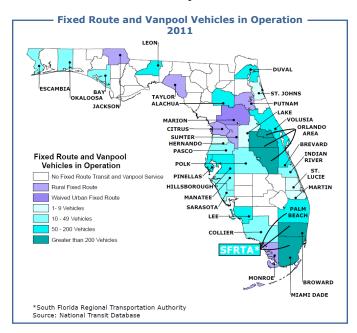


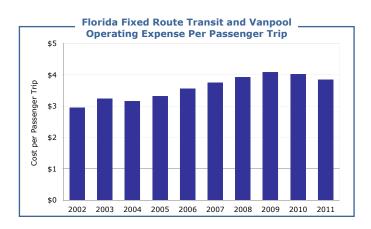




Sources: FDOT, Reports of Highway Mileage and Travel; FDOT, Bridge Inventory: 2012 Annual Report; FDOT, Revenue Estimating Conference Reports

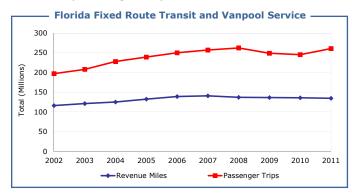
Transit Systems





Transit Systems

- Passenger boardings on fixed route and vanpool services were nearly 261 million in 2011, an increase of about 6.3% from 2010.
- Revenue miles of transit service decreased about 1% in 2011. However, transit ridership grew due to population growth, high gas prices, automobile affordability challenges, and transit service and infrastructure improvements.
- In 2011, Miami-Dade Transit carried 7.3 million more passengers. Its ridership was nearly 40% of the statewide total. Other large increases included the Orlando area and Hillsborough County with 2.2 million and 1.8 million more passengers, respectively.
- Approximately 79% of Florida's population resides within three-quarters of a mile of a transit route.
- Five Florida vanpool agencies reported over 1 million passenger trips in 2011.



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

Note: Florida has 35 fixed route agencies: 6 rural and 29 urban. Rural systems are not required to report NTD information and Marion County (Ocala) has a waiver for reporting, thus reported data is for 28 urban systems.

Transportation Disadvantaged Services

- Florida's Transportation Disadvantaged (TD)
 Program coordinated and provided over 51.1
 million trips, over 452,000 fewer than 2010.
- Fixed route transit services provided over 35.9 million TD Program trips.
- Of the trips provided by the TD Program, 35% were for medical purposes, 8% for employment, 21% for education/training, 21% for nutrition, and 16% for other services.
- Florida's residents 60 or older account for 55% of TD trips, children and low-income persons make up 9% each, disabled people compose 11%, low income/disabled account for 13%, and 3% are other.
- There were 228,640 unmet TD trip requests, a decrease of 66% from 2010.



Source: Florida Commission for the Transportation Disadvantaged, 2011 Annual Performance Report

Pedestrian and Bicycle Facilities

- Bicycle way: Any road, path or way which by law is open to bicycle travel, such as bicycle lanes, paved shoulders, shared use paths and traffic lanes.
- Pedestrian way: A space for pedestrian travel separated from traffic lanes, such as sidewalks, shared use paths, footpaths and shoulders.

Florida Bicycle and Pedestrian Facilities on Non-Limited Access State Highway System (SHS)

Facilities	Centerline Miles	Percentage of SHS Mileage (9,867)
Bike Lanes	729	7.4%
Sidewalks	2,949	29.9%
Paved Shoulders	7,292	74%
Shared Paths	160	1.6%

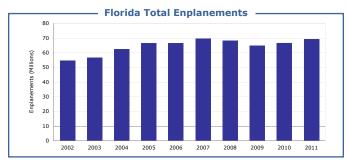
- Walking as a means of commuting to work in Florida has ranged between 1.5% and 1.7% since 2004, well below the national average of 2.8%.
- Bikes-on-bus usage has grown in Florida.
 Space Coast Transit in Brevard had the highest increase with 18% more users in 2011 than 2010 and almost 95% more than in 2007.

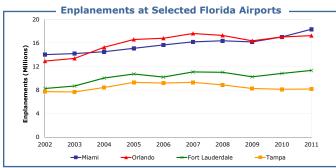
Florida Annual Bikes on Bus Boardings					
Agency	2007	2008	2009	2010	2011
PSTA, St. Petersburg	28,461	33,007	29,454	31,104	27,557
HART, Tampa	20,730	20,663	17,925	18,213	19,354
Space Coast, Brevard	6,967	8,081	10,176	11,480	13,545
Star Metro, Tallahassee	1,524	2,227	2,209	2,196	2,325

Source: FDOT; individual transit agencies

Airports

- Security concerns, industry restructuring, fuel price volatility, consolidation, and the lingering recession have created near-term uncertainty regarding air travel. However, the core demand trend for air travel appears to remain strong.
- Commercial airport expansion has slowed but is expected to resume as forecasted demand increases and financial viability returns.
- Florida's total enplanements increased by 4.0% from 2010, reaching over 69.3 million in 2011.
 Activity at Miami, Orlando, Fort Lauderdale and Tampa International Airports grew by 7.8%, 1.4%, 4.6% and 0.5%, respectively.



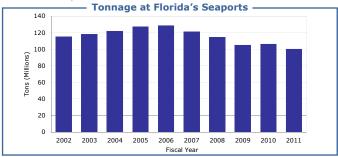


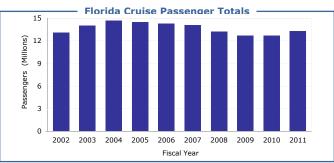
Source: FDOT; Federal Aviation Administration

Seaports

In 2011:

- Florida's 15 deepwater seaports moved 100.3 million tons of cargo and handled over 3 million 20-foot equivalent container units.
- Florida's total waterborne cargo value increased by 18.6% and container movements by 6.4%. Waterborne tonnage decreased by 5.7%.
- Cruise passenger volumes grew 4.9% with a 28.5% decrease in one-day but a 6.8% increase in multi-day cruises.
- Seven of Florida's 15 seaports carried 13.5 million cruise passengers, with 13 million on multi-day cruises.





Source: Florida Ports Council, Charting a Course for Economic Success: The Five-Year Florida Seaport Mission Plan, 2012 to 2016; FDOT

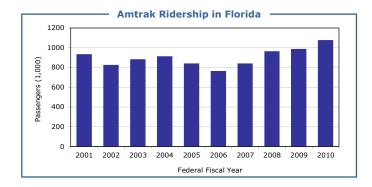
Rail System

- Of the 2,786 miles of rail lines in Florida, all but 142 miles are owned by 15 freight railroads and the entire track is controlled by them.
- According to the Federal Railroad Administration, 3,633 public at-grade rail crossings existed in Florida as of November 2012, which presented both safety and mobility challenges.
- In 2010, Florida's freight railroads moved nearly 106.8 million tons of freight.
- In 2010, Florida originated 746,200 rail carloads, a 10.3% increase from 2009, and terminated 1,174,200 carloads, a 13.3% increase. Florida ranks 12th and 6th among the states, respectively.



Rail System

- FDOT purchased the 61-mile SunRail commuter rail corridor owned by CSX in 2011. Through a public-private partnership, construction on Phase I of the SunRail has begun.
- Passenger train service between Miami and Orlando could begin as early as 2014. The new "All Aboard Florida" service, which would be privately owned and operated, would offer frequent, regularly scheduled daily trains geared to business travelers and tourists.
- In FY 2011, the Auto Train carried nearly 260,000 passengers, removing over 126,000 vehicles from highways connecting Florida with the Northeast. Amtrak ridership in Florida has increased for five consecutive years, 51.5% above the 2006 level.
- Amtrak employed 736 Florida residents in 2011 and operated service on almost 500 route miles in Florida.



Source: FDOT Rail Office; Amtrak; Association of American Railroads,

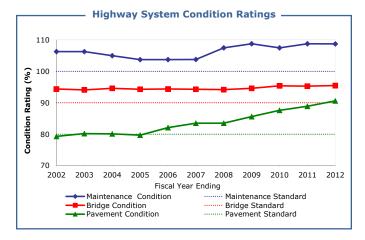
Railroad Safety Statistics - Annual Report 2011

Note: Urban rail transit services are included in the transit pages of

the Pocket Guide.

System Performance

FDOT is committed to keeping the State Highway System (SHS) in acceptable condition. This includes meeting standards for maintenance, bridge and pavement conditions. Condition ratings on the SHS continue to exceed the standards set by the Florida Legislature.

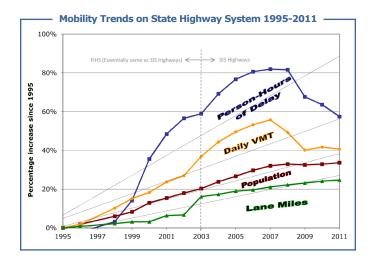


Florida Department of Transportation Contracting Activity, State Highway System Including Turnpike					
	2007- 2008	2008- 2009	2009- 2010	2010- 2011	2011- 2012
Lane Miles for Resurfacing	2,186	2,894	3,072	2,792	2,550
Lane Miles for Highway Capacity Improvements	241	229	177	307	250
Bridges to Be Repaired	75	92	131	120	113
Bridges to Be Replaced	12	23	24	14	18

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System Performance

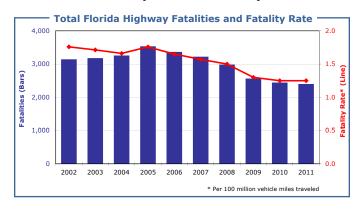
- From 2001 to 2011, Vehicle Miles Traveled (VMT) on the SHS increased over 10.2%, but lane miles grew by only 6.9%.
- Since 2008, lane mile growth, though modest, has outpaced VMT growth, reversing a trend of demand growth outpacing new capacity.
- In FY 2012, FDOT contracted for 250 lane miles of capacity improvements, 2,550 lane miles of SHS resurfacing, and 131 bridge repairs and replacements.
- Historic trends in roadway demand and traveler delay have changed dramatically in recent years.

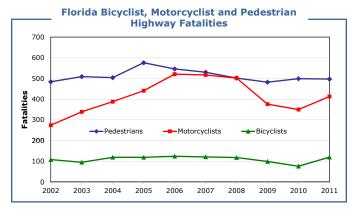


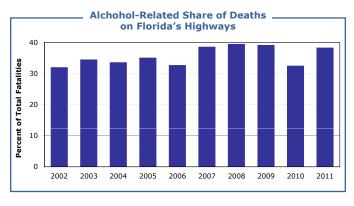
Source: FDOT

Note: Delay trend is based on a three-year moving average.

Transportation Safety







Transportation Safety

When compared with 2010, in 2011:

- Total traffic fatalities in the U.S. decreased by 1.7% to 32,310, the lowest levels since 1949, according to the National Highway Traffic Safety Administration (NHTSA).
- The Florida Department of Highway Safety and Motor Vehicles (DHSMV) reported traffic fatalities decreased by 1.8% to 2,400.
- Florida's fatality rate remained at 1.25 fatalities per 100 million vehicle miles, after a consecutive drop for five years.
- Of Florida's 2,400 traffic deaths, 43% were bicyclists, pedestrians, and motorcyclists. The Strategic Highway Safety Plan has goals and objectives to reduce the number of fatalities to these "Vulnerable Road Users".
- Pedestrian fatalities decreased by about 0.4%, but bicyclist fatalities increased by 57.9% from 76 to 120.
- About 17.8% more motorcyclists and their passengers were killed on Florida roads, an increase from 383 to 451. There were 413 fatalities for motorcyclists alone, up from 350.
- Alcohol-related fatalities increased by 15.9% from 794 to 920, representing 38.3% of the total traffic deaths.

Source: Florida DHSMV; NHTSA

Transportation and the Environment







In 2011, the Federal Highway Administration identified FDOT's Coastal Roadway Environmentally Sensitive Lighting Initiative as an Exemplary Ecosystem Initiative, highlighting the project's innovative approach to wildlife preservation to reduce or eliminate impacts to sea turtles along State Road A1A in Boca Raton. The embedded roadway lighting system also was recognized by the Florida Institute of Consulting Engineers, the American Council of Engineering Companies, and the State of Florida Prudential-Davis Productivity Awards program.

As part of the department's re-engineering of the Highway Beautification Program, FDOT is implementing roadside beautification projects using large trees and few, if any, shrubs. With thoughtful site-specific design, this approach will help make Florida a more attractive place to visit and do business.

The historic Snow-Reed Swing Bridge on SW 11th Avenue in Fort Lauderdale is an example of the department's commitment to preserving historic transportation structures. Working with the U.S. Coast Guard, CSX Railroad, the State Historic Preservation Office, the city of Fort Lauderdale, local historians and rail enthusiasts, FDOT was able to incorporate a section of the bridge into a nearby park.

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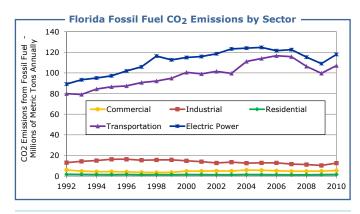
Transportation and the Environment

FDOT has restructured its mitigation program to promote efficiency, cost-effectiveness and timeliness in project delivery. By law, the Department must now consider all available mitigation options such as private banks, mitigation



performed by water management districts, or other options that satisfy both federal and state requirements to offset known impacts to wetlands and endangered species. Decisions are based on interagency coordination and the comparison of options to ensure that the chosen mitigation fully compensates for project impacts, is cost-effective and successful.

Second only to the residential sector, the transportation sector has been a big contributor of CO_2 emissions for decades. In recent years, the gap between the top two sectors is narrowing.



Source: FDOT; U.S. Environmental Protection Agency

Note: Bridge photo credit to @Alan S. Maltz/alanmaltz.com

Transportation and the Economy

 Transportation is critical to the economy both in the short term by providing construction employment and in the long term by providing mobility for economic productivity and competitiveness.



- Florida's economic competitiveness depends on the efficient and reliable connectivity of a multimodal transportation system to global markets, within and between Florida's diverse regions.
- Florida's international trade rose to over \$149 billion in 2011, an 18.2% increase from 2010 to reach an all-time high.
- In 2011, exports exceeded imports for the 5th year in a row, and both exports and imports continued to recover from the 2009 decline.

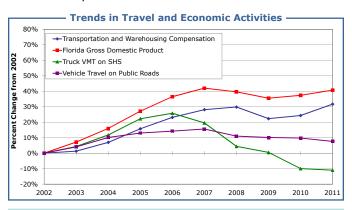


Transportation and the Economy

- Vehicle miles traveled on the public road system decreased by 6.9% between 2007 and 2011.
- Truck miles traveled (TMT) on the State Highway
 System (SHS) started to decline in 2007, continuing through 2011. In 2011, TMT constituted 7.8% of vehicle mileage on the SHS, 29% below its peak in 2006.



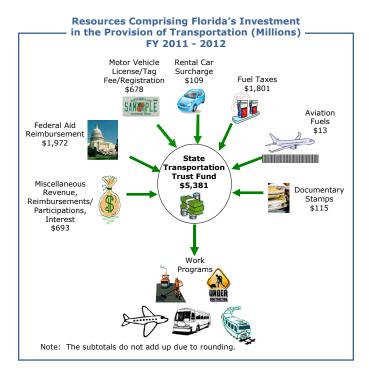
- Wages and salary disbursements for Transportation and Warehousing industries saw a gain of nearly 6% in 2011, reaching a new record.
- Employment in Transportation and Material Moving Occupations, which includes most direct transportation workers, accounts for 5.7% of total employment in Florida. In 2011, the industry employed 405,270 workers, up 5.7% from 392,460 in 2010.



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

Transportation Resources

The public and businesses spend resources on transportation both directly and indirectly. Public resources, comprising the state's investment in transportation, come from a variety of sources as depicted in the graphic below.

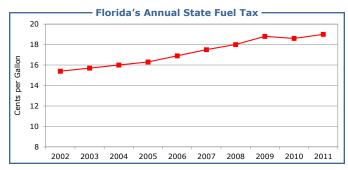


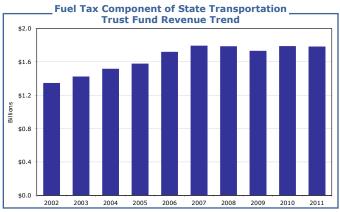
Florida's transportation revenues include fuel taxes and other fees that support local, state and federal transportation spending. Total fuel tax rates include federal and state fuel taxes, the State Comprehensive Enhanced Transportation System (SCETS) tax, and local fuel taxes.

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Transportation Resources

- In Florida, the fuel sales and the SCETS taxes are indexed to the general rate of inflation on January 1 of each year.
- The combined state fuel sales and SCETS tax rate rose by 24% from 15.7 cents per gallon in 2003 to 19.5 cents per gallon in 2012.
- The fuel tax component of the State Transportation Trust Fund grew during the early part of the last decade but has remained steady in recent years due to slowing travel, improved gas mileage and lower inflation adjustments.



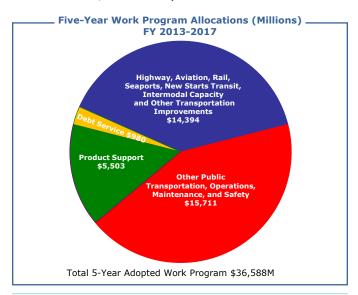


Source: FDOT

Transportation Expenditures

State and federal resources for transportation are channeled through 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 2013-2017 Work Program decreased by \$50 million from the 2012-2016 program. Allocations have increased for product support and there is no change to highway, aviation, rail, seaports, new starts transit, intermodal capacity enhancement and other transportation improvements. There is a relative drop in allocations to debt service and the category "other public transportation operations, maintenance, and safety."

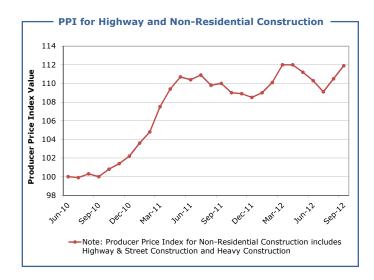


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Source: FDOT

Transportation Costs

- Construction costs have risen by 11% in the past two years.
- After falling from their peak in the first half of 2008, construction costs moved upwards through the first half of 2011. Since then costs have fluctuated.
- Total construction employment in Florida declined by 8,500 persons from 2010 and heavy civil construction employment declined by 3,900.
- Transportation construction costs are influenced by construction industry capacity, competition for labor and materials with other industries, and construction material and fuel costs.



Source: U.S. Department of Labor, Bureau of Labor Statistics

Florida Fast Facts

General

18.9 million people - 4th most populous state

- 87.5% living in urban areas
- 17.6% over age 65
- 87.3 million annual visitors
- 53,625 square miles of land 26th largest

Transportation System:

121,759 centerline miles of public roads

12,076 centerline miles of State Highway System

42,965 lane miles of State Highway System

653 centerline miles of toll facilities

2,955 lane miles of toll facilities

11,987 bridges, 6,661 maintained by the state

29 urban fixed route transit agencies

6 rural fixed route transit agencies

463 transportation disadvantaged operators

15 seaports, 7 with cruises

779 airports

- 129 public use
- 650 private use
- 15 railroads
 - 2,786 miles of rail lines
 - 3,793 public at-grade crossings
 - 2 Amtrak routes 18 stations
- 14 million registered vehicles

System Usage:

- 191,855 million annual vehicle miles of travel
 - 69 million enplanements
 - 261 million transit trips
 - 51 million transportation disadvantaged trips
 - 14 million cruise passengers
 - 762 million tons of freight traffic

Links

Florida Transportation Plan

www.dot.state.fl.us/planning/ftp

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 flaports.org

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



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Produced by the
Florida Department of Transportation
Office of Policy Planning
with support from the
Center for Urban Transportation Research
University of South Florida

