2050 PATH FORWARD
Leading the Way for Transportation Innovation

September 2023

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Technical Report 1
Planning Context

NORTH FLORIDA TPO

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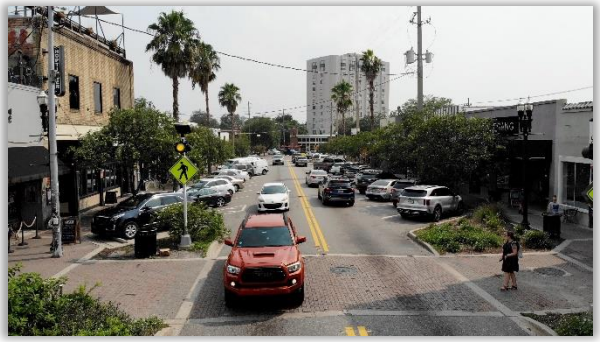
1.0 Introduction

The North Florida Transportation Planning Organization (TPO) is a federally-mandated agency responsible for setting policy on local transportation issues, providing a forum for a coordinated, comprehensive, and continuous planning process for all transportation-related issues within the region and determining how to prioritize State and Federal transportation dollars within the region.



The Long-Range Transportation Plan (LRTP) is the vision for maintaining and enhancing the regional multimodal transportation system for the next 20 years. The plan, updated at least every five years, identifies the region's critical needs and challenges and provides a framework that will guide decision-making for future transportation investments. The LRTP offers a comprehensive assessment of the region, reviewing where we live and work, evaluating the existing transportation network, and identifying projects that will serve residents' needs in the future.

The North Florida TPO produces several core products to advance the mobility of the region in which the LRTP is a critical guiding document for all other core products. These products include:

- **Unified Planning Work Program (UPWP)** – Two-year operational budget of the TPO (operations, work program development, and transportation and related planning responsibilities).
- **Long Range Transportation Plan (LRTP)** – guides investment in the region's transportation system for the next 25 years.
- **List of Priority Projects** – Annual list of multimodal transportation priorities.
- **Transportation Improvement Program (TIP)** – Five-year comprehensive list of Federal, State, and locally funded transportation projects, including transit, roadways, bridges, aviation, seaport, rail and commuter rail, bicycle facilities, pedestrian provisions, and enhancement projects such as landscaping and greenways.
- **Public Participation Plan (PPP)** – Plan to guide the public participation activities of TPO staff to achieve the TPO Board's Mission and Vision.

1.1 Purpose of the Plan

The 2050 LRTP for the North Florida TPO outlines the goals, objectives, policies and improvements that are needed to maintain a safe and efficient multimodal transportation system moving people and goods throughout the area to enhance the economic, social and environmental qualities of the community. This document is to satisfy the metropolitan planning requirements of the federal transportation planning process and to identify priority transportation investments in the region.

The 2050 LRTP replaces the 2045 LRTP, which was adopted November 2, 2015. The 2050 LRTP update process began in April 2023 and plans for transportation projects to 2050. The TPO formed an LRTP Working Group comprised of Technical Advisory Committee (TAC) and Citizen Advisory Committee (CAC) members to establish the goals of the region's transportation network and guide the planning process.

1.2 Study Area

The North Florida TPO study area encompasses all of Clay, Duval, Nassau and St Johns Counties including the incorporated cities of Jacksonville, Atlantic Beach, Neptune Beach, Jacksonville Beach, St. Augustine, St. Augustine Beach, Fernandina Beach, Green Cove Springs, Keystone Heights and the towns of Baldwin, Callahan, Hillard, Orange Park and Penney Farms. It is situated along the St. Johns River, with the Atlantic Ocean to the east and bordering Georgia to the north.

The land area within the North Florida TPO study area is approximately 3,000 square miles and has 1.55 million residents. **Figure 1-1** presents the North Florida TPO Study Area.

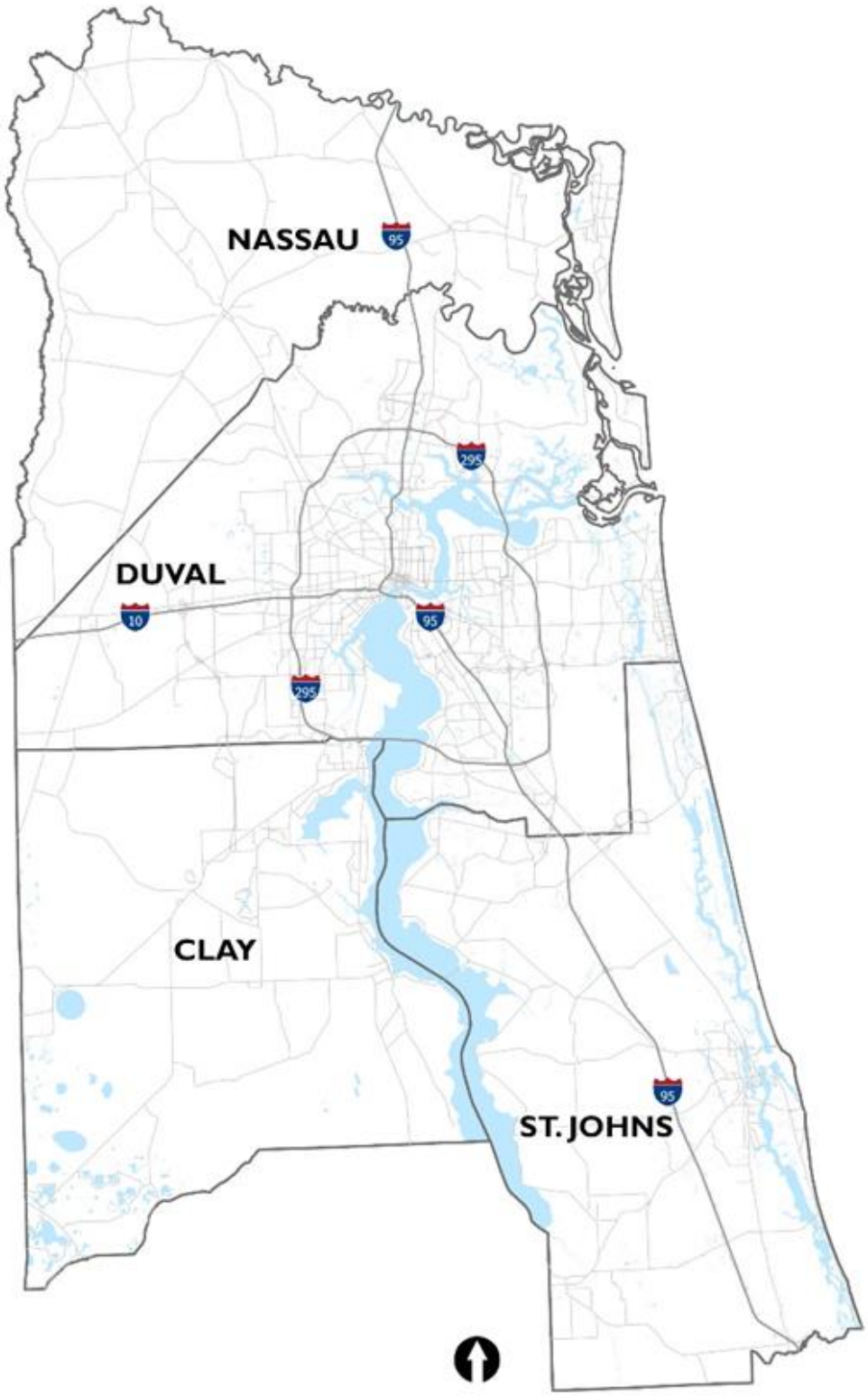
The City of Jacksonville serves as the anchor of the metropolitan area. It is the largest city by land area in the contiguous United States and boasts a diverse range of neighborhoods and districts. Jacksonville is known for its riverfront downtown area, historic sites, vibrant arts scene, and a mix of modern and traditional architecture.

Surrounding Jacksonville are various suburban communities that make up the Greater Jacksonville area. These include Orange Park, Ponte Vedra Beach, Jacksonville Beach, Atlantic Beach, Neptune Beach, Fernandina Beach, and more. Each of these communities has its distinct character, with a blend of residential areas, commercial centers, and recreational spaces.

The area is renowned for its natural beauty and outdoor recreational opportunities. The St. Johns River, which flows through the region, offers opportunities for boating, fishing, and water sports. There are also numerous parks, including the expansive Timucuan Ecological and Historic Preserve, which preserves wetlands, forests, and historic sites. The coastal areas provide beaches, dunes, and marshes for residents and visitors to enjoy.

Jacksonville is a major economic hub in northeastern Florida, with diverse industries contributing to its economy. It has a strong presence in industries such as finance, insurance, healthcare, logistics, manufacturing, and technology. The Port of Jacksonville is one of the busiest ports on the East Coast of the United States, facilitating trade and commerce.

Figure 1-1: North Florida TPO Study Area



The Jacksonville area offers a variety of cultural and entertainment options. The region has several museums, including the Cummer Museum of Art and Gardens, the Museum of Science and History (MOSH), and the Jacksonville Zoo and Gardens. Numerous festivals, theaters, sports events, and recreational activities are held throughout the year.

Its diverse communities, economic opportunities, and abundance of recreational activities continue to make the region an attractive place to live, work, and explore.

1.3 Federal Laws and the Transportation Planning Process

Transportation planning plays a fundamental role in a state, region, or community's vision for its future. It includes a comprehensive consideration of possible strategies; an evaluation process that encompasses diverse viewpoints; the collaborative participation of relevant transportation-related agencies and organizations; and open, timely, and meaningful public involvement.

The Federal Transit Administration (FTA) and Federal Highway Authority (FHWA) jointly administer the federally required transportation planning processes in metropolitan areas, as set forth in 49 U.S.C. 5303 and 23 U.S.C. 134. In rural areas and on a statewide basis, the statutory provisions for transportation planning are set forth in 49 U.S.C. 5304 and 23 U.S.C. 135.

The LRTP is a key planning product of the statewide and metropolitan transportation planning processes, which Federal law specifies must "provide for the establishment and use of a performance-based approach to support the national goals [of the Federal-aid highway program (23 U.S.C. 150(b))] and the general purposes [of the Federal-aid public transportation program (49 U.S.C. 5301)]".

In addition to performance-based components, a long-range transportation plan must meet all Federal transportation planning requirements. These requirements include, but are not limited to:

- Consideration of ten planning factors (described in this guidebook under Element 2: Goals and Objectives).
- Inclusion in the plan of a "discussion of potential environmental mitigation activities and potential areas to carry out these activities, including activities that may have the greatest potential to restore and maintain the environmental functions affected by the "plan."
- Consultation with governments and participation by interested parties.
- Air quality conformity requirements in states and metropolitan areas containing nonattainment and maintenance areas (compliance with sections 174 and 176(c) and (d) of the Clean Air Act, as amended (42 U.S.C. 7504, 7506(c) and (d)) and 40 CFR part 93).9

In addition, all aspects of the planning process are subject to Federal laws, regulations, and executive orders concerning the fair and equitable treatment of people, including, but not limited to:

- Title VI of the Civil Rights Act of 1964, as amended (42 U.S.C. 2000d-1) and 49 CFR part 21, which prohibits recipients of Federal financial assistance from taking actions that discriminate on the basis of race, color, or national origin.
- Executive Order 12898, Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations, which further amplifies Title VI by providing that "each Federal agency shall make achieving environmental justice part of its mission by identifying and addressing, as appropriate, disproportionately high and adverse human health or environmental effects of its programs, policies, and activities on minority populations and low-income populations."
- 49 U.S.C. 5332, which prohibits discrimination on the basis of race, color, creed, national origin, sex, or age in employment or business opportunity;
- Section 11101(e) of BIL and 49 CFR part 26, regarding the involvement of disadvantaged business enterprises in Department of Transportation (DOT)-funded projects;
- 23 CFR part 230, regarding implementation of an equal employment opportunity program on Federal and Federal-aid highway construction contracts;
- The provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.) and 49 CFR parts 27, 37, and 38;
- The Age Discrimination Act of 1975, as amended (42 U.S.C. 6101 et seq.), prohibiting discrimination on the basis of age in programs or activities receiving Federal financial assistance;
- 23 U.S.C. 324, regarding the prohibition of discrimination based on gender; and
- Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794) and 49 CFR part 27 regarding discrimination against individuals with disabilities.

Federal Transportation Planning Framework

The federal transportation planning framework provides guidance and requirements to transportation plans and programs. The framework involves several key components and federal agencies. The main elements are as follows:

- **Metropolitan Planning Organizations (MPOs):** MPOs are regional agencies responsible for transportation planning in metropolitan areas. They are required by federal law Urban Areas with a population of 50,000 or more. MPOs collaborate with state departments of transportation (DOTs), local governments, transit agencies, and other stakeholders to develop transportation plans and programs.

- **Metropolitan Transportation Planning:** MPOs lead the metropolitan transportation planning process, developing long-range transportation plans and TIPs. These plans and programs consider the transportation needs and priorities of the region, address performance measures, and establish investment strategies for transportation projects and programs.

- **Statewide Transportation Planning:** State Departments of Transportation (DOTs) are responsible for statewide transportation planning, which coordinates with the metropolitan transportation planning process. Statewide transportation plans integrate the regional transportation plans and establish a vision, goals, and policies for transportation investments and strategies across the entire state.

- **Federal Highway Administration (FHWA) and Federal Transit Administration (FTA):** The FHWA and FTA are federal agencies within the U.S. DOT that oversee and provide guidance on transportation planning. They work closely with MPOs and state DOTs to ensure compliance with federal laws and regulations, provide funding for transportation projects, and offer technical assistance and support.

- **Transportation Improvement Program (TIP):** The TIP is a short-term program that identifies specific transportation projects and programs to be implemented within a metropolitan area. It includes a schedule, funding information, and project details. MPOs develop the TIP by collaborating with state DOTs, transit agencies, and other stakeholders. The TIP must be financially constrained and consistent with the long-range transportation plan.

- **Public Involvement:** Federal transportation planning emphasizes public involvement and engagement. MPOs and state DOTs are required to engage with the public, stakeholders, and disadvantaged communities throughout the planning process. Public input helps shape transportation plans and programs, ensures transparency, and considers the needs and perspectives of the community.

These elements form the basis of the federal transportation planning framework which aims to foster collaboration, transparency, and effective decision-making in transportation planning at the regional and state levels. The framework ensures compliance with federal laws and regulations, promotes coordination between agencies and stakeholders, and supports developing integrated transportation systems.

Federal Transportation Planning Factors

Federal transportation planning factors refer to the considerations and criteria that must be taken into account when developing transportation plans and programs at the federal level in the United States. These factors help guide decision-making and ensure that transportation planning is comprehensive, equitable, and sustainable. The Moving Ahead for Progress in the 21st Century Act (MAP-21) provided funding for surface transportation programs between fiscal years (FY) 2013 and 2014. MAP-21 identifies ten planning factors (23 CFR 450.316) that must be considered as part of the transportation planning process for all metropolitan areas. These planning factors were integrated into the developing the LRTP, and include the following:

1. Support the economic vitality of the metropolitan area, especially by enabling global competitiveness, productivity, and efficiency.
2. Increase the safety of the transportation system for motorized and nonmotorized users.
3. Increase the security of the transportation system for motorized and nonmotorized users.
4. Increase accessibility and mobility of people and freight.
5. Protect and enhance the environment, promote energy conservation, improve the quality of life, and promote consistency between transportation improvements and State and local planned growth and economic development patterns.
6. Enhance the integrating and connecting of the transportation system, across and between modes, for people and freight.
7. Promote efficient system management and operation.
8. Emphasize preserving the existing transportation system.
9. Improve the resiliency and reliability of the transportation system and reduce or mitigate stormwater impacts of surface transportation.
10. Enhance travel and tourism.

These factors, among others, are taken into account during the transportation planning process to ensure that federal investments in transportation align with national priorities, address community needs, and result in sustainable and effective transportation systems.

2.0 Demographics

Population and demographic statistics provide perspective on existing and historic settings of the North Florida TPO region. This information provides an overview of the population composition of the region that leads to a more informed understanding of the community and how the North Florida TPO region has changed over time. The data in this section analyzes trends that can be used to guide future decision-making and prioritization for the region. Additionally, this data provides an outlook as to how the North Florida TPO region compares to the state of Florida as a whole as well as provides comparisons across the four counties.

Figure 2-1 Region Total Population Estimate, 2022

1,651,814

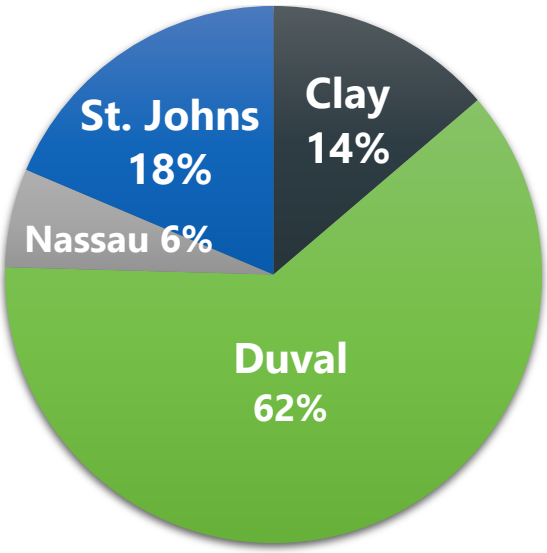
2022 Population Estimate (BEBR)

1,577,589

2020 Population Estimate (BEBR/US Census Bureau)

4.5% population increase between **2020 and 2022** across the region

Figure 2-2 Total Population Estimate, 2022 by County (BEBR)



2.1 Population Size and Growth

Growth in population places a higher demand for mobility. North Florida has experienced consistent population growth over the years. The region's population grew by 20.2% or 333,000 persons, between 2010 and 2022 significantly outpacing the state and the nation. According to available data, the region's population was estimated to be over 1.65 million people as of 2022. Population growth is influenced by factors such as job opportunities, quality of life, and the attractiveness of the area for retirees.

North Florida's strong growth outpaced population gains statewide and is anticipated to continue through 2022.

Figure 2-3 Total Population Estimate, 2022 by County (BEBR)

225,553	1,033,533	95,809	296,919
Clay County	Duval County	Nassau County	St. Johns County

30.5% population increase between **2010 and 2020** in St. Johns County alone

16.4% population increase between **2010 and 2020** in region-wide

Table 2-1 Total Population, 2010-2022 (BEBR)

Total Population	***2010***	***2015***	***2020***	***2021***	***2022***	***2010-2020 % Change***
TPO Region	**1,318,481**	**1,396,953**	**1,577,589**	**1,616,794**	**1,651,814**	**16.4%**
Clay	190,865	201,277	218,245	221,440	225,553	12.5%
Duval	864,263	905,574	995,567	1,016,809	1,033,533	13.2%
Nassau	73,314	76,536	90,352	93,012	95,809	18.9%
St. Johns	190,039	213,566	273,425	285,533	296,919	30.5%

Figure 2-4 Total Regional Population from 2010-2022 (BEBR)

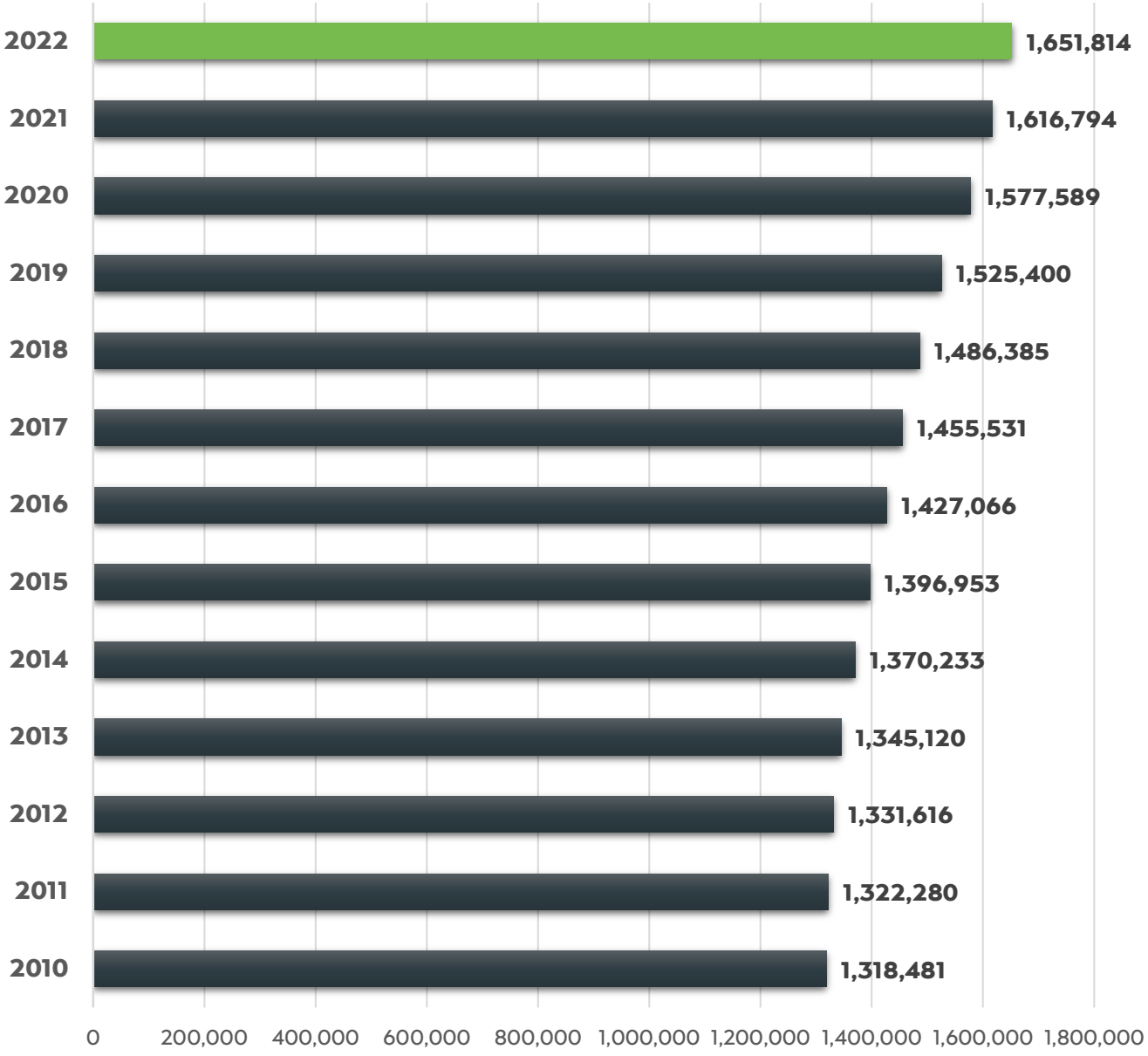
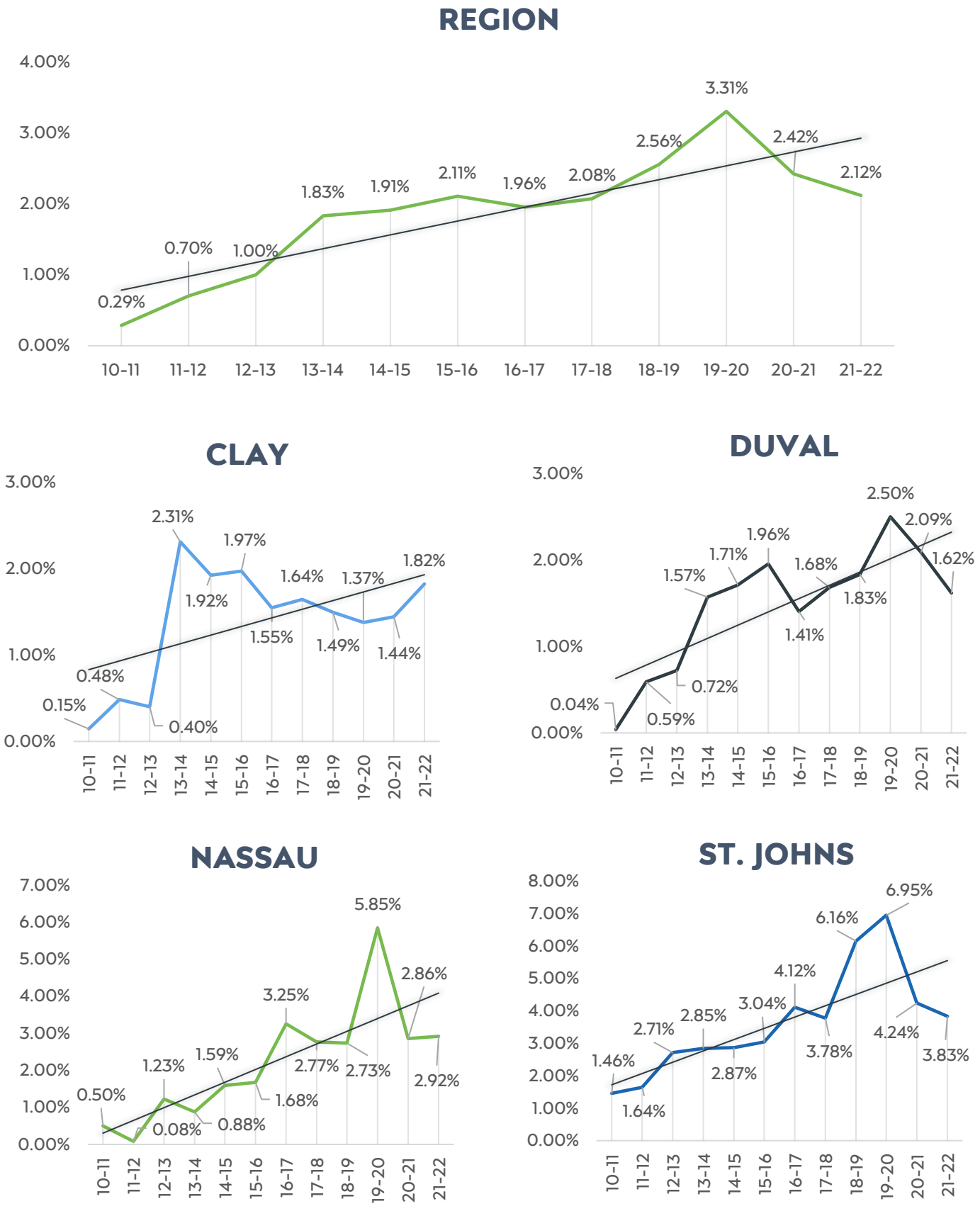


Figure 2-5 Annual Population Change from 2010-2022 (BEBR)



The following map series in Figures 2-6 through 2-9 shows how the population density has spread throughout the region from 2000 to 2020 (*Source: US Census Data, 2000, 2010, 2015, 2020*).

Figure 2-6 Population Density, 2000

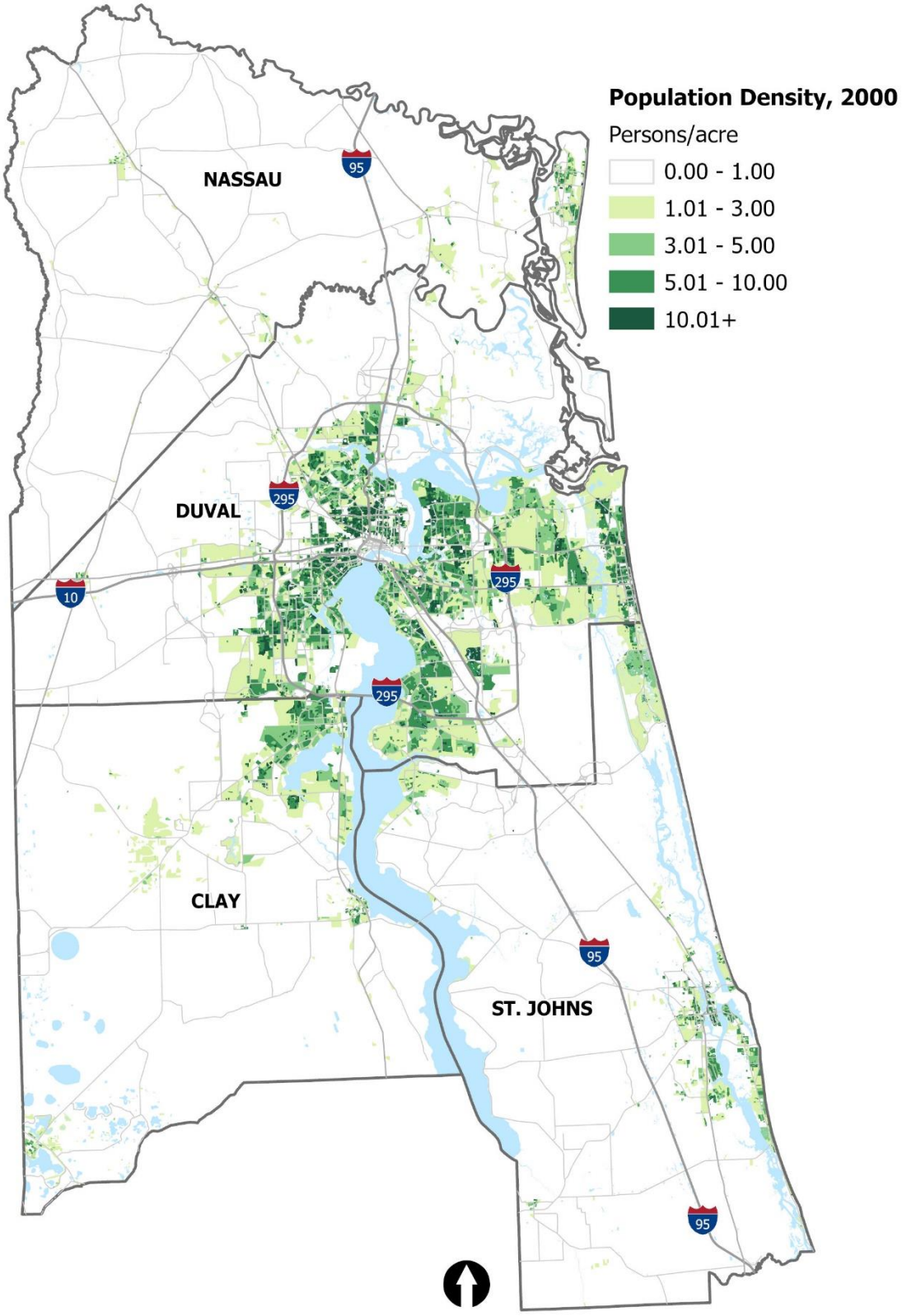


Figure 2-7 Population Density, 2010

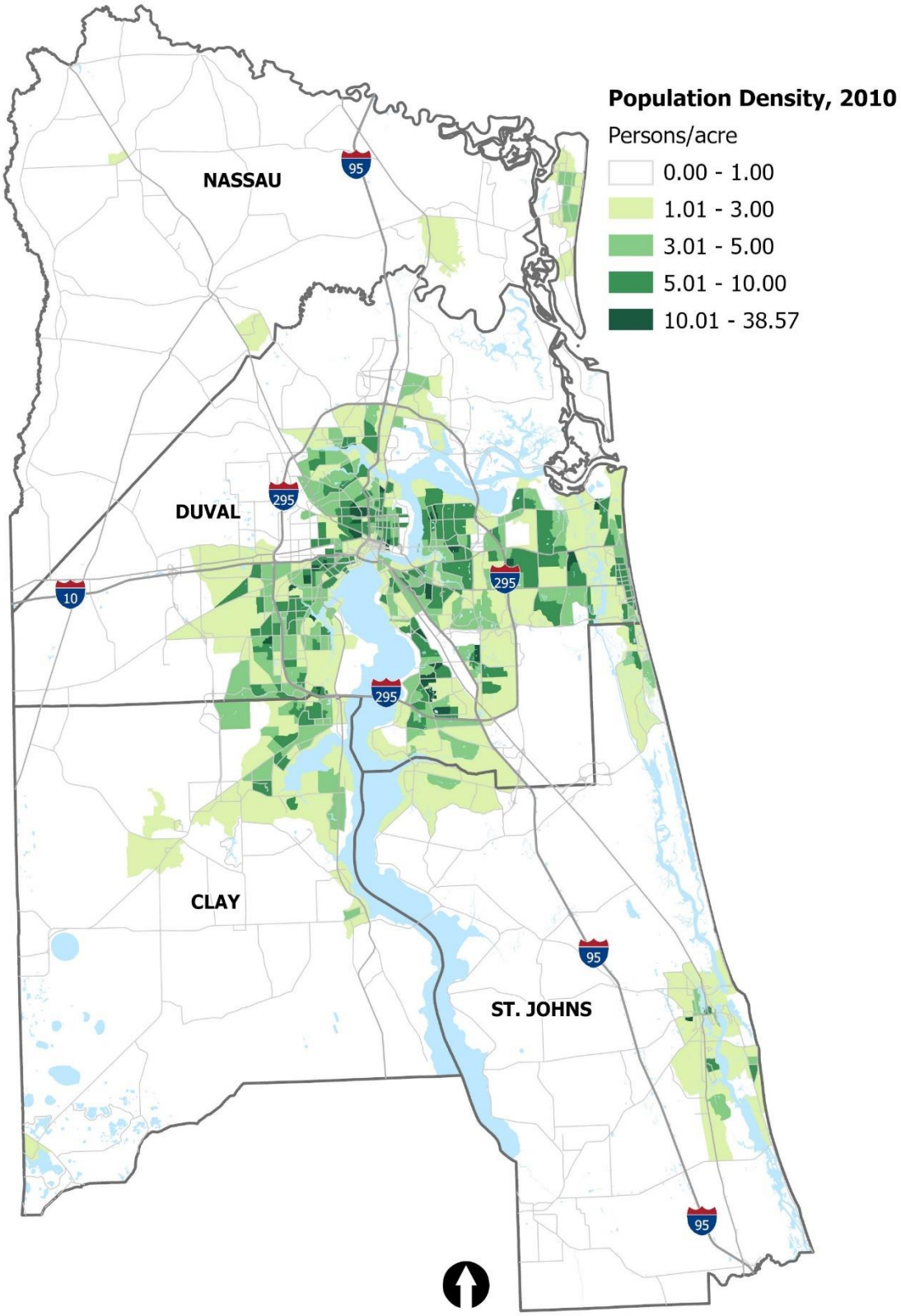


Figure 2-8 Population Density, 2015

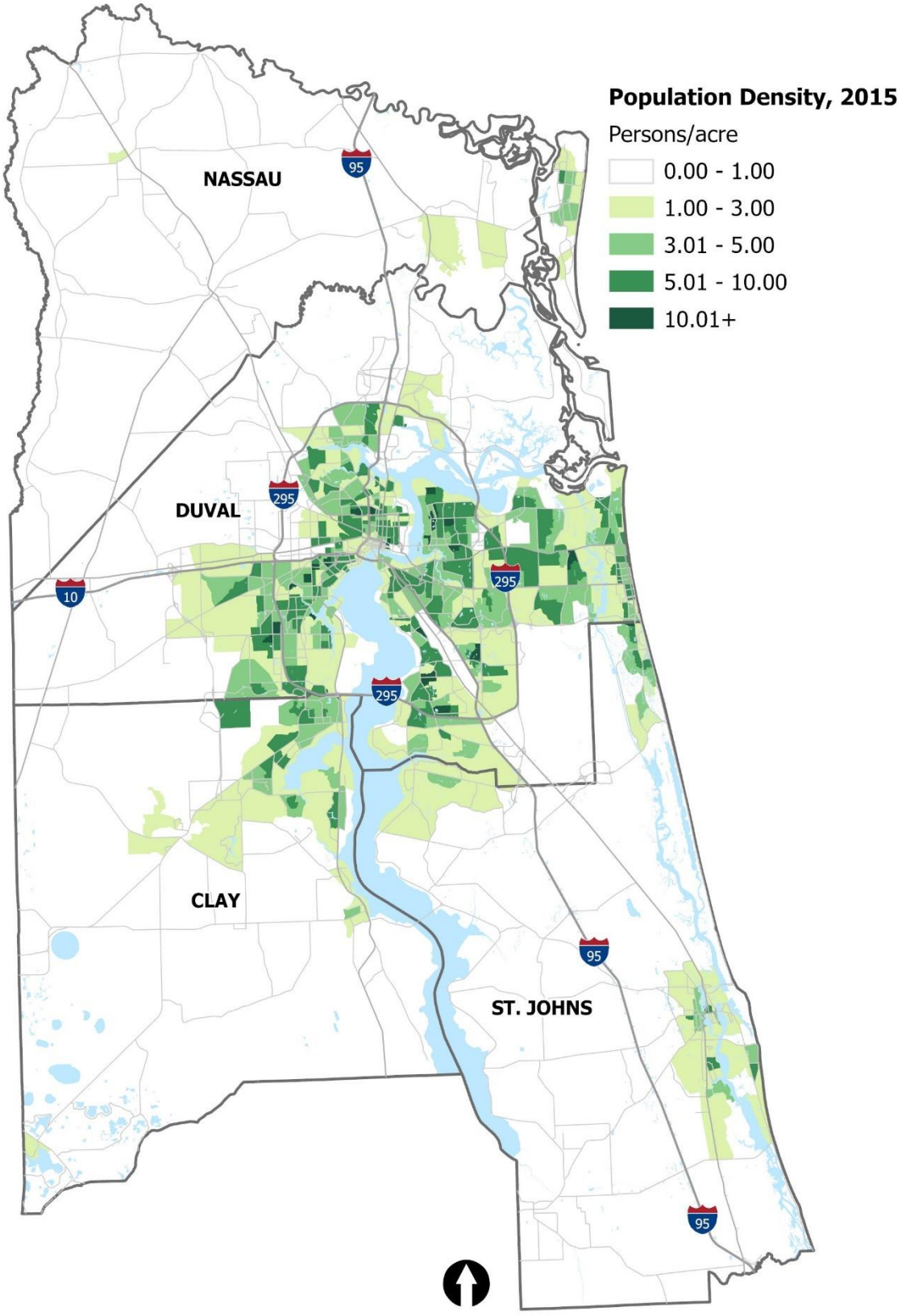
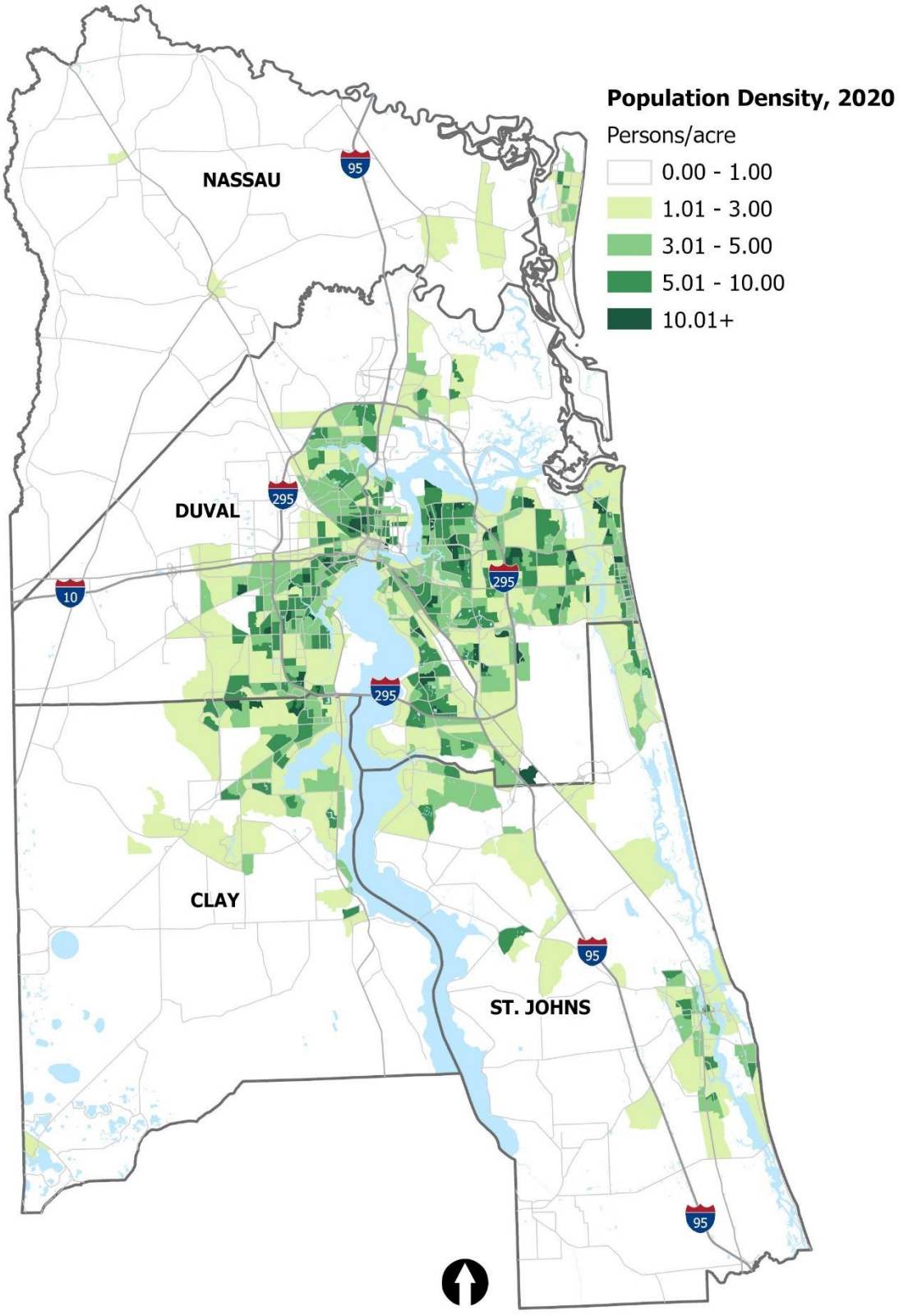


Figure 2-9 Population Density, 2020



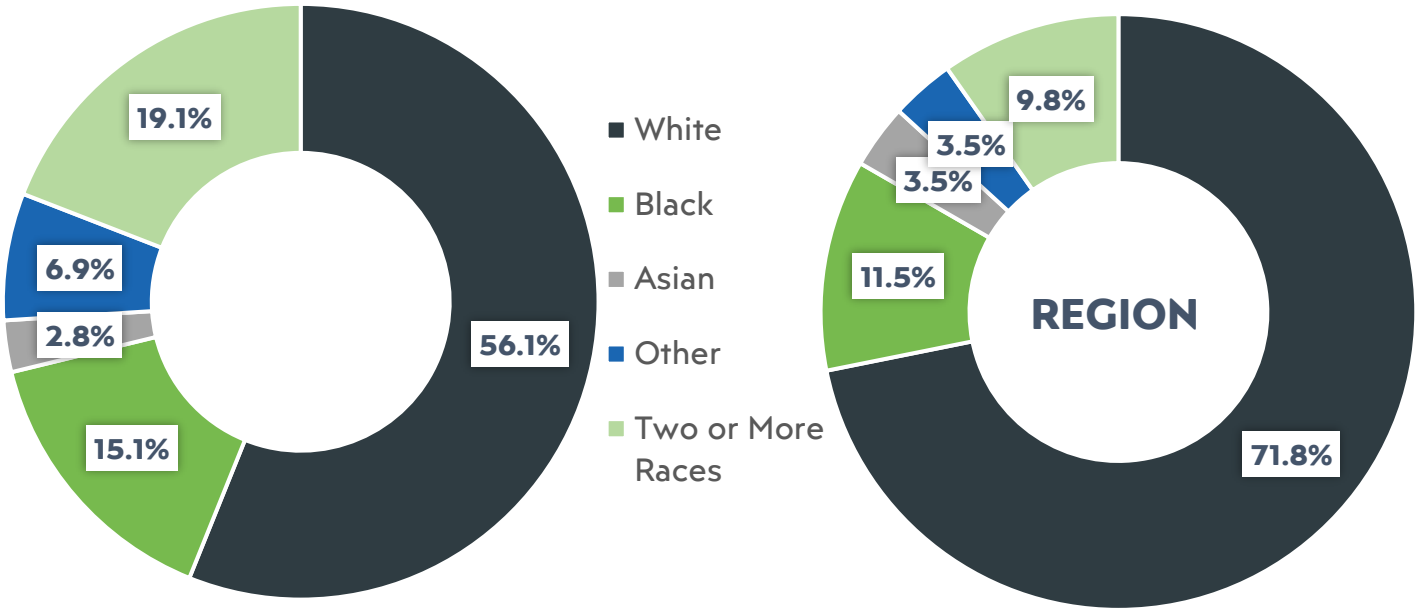
2.2 Racial and Ethnic Diversity

The population of North Florida is racially and ethnically diverse. The breakdown includes a mix of White, African American, Hispanic or Latino, Asian, and Native American individuals. The region also has a notable military presence, contributing to its diversity.

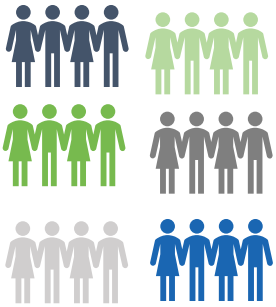
The majority of the population in Northeast Florida is white, with a significant percentage of residents identifying as non-Hispanic white. The Black or African American community also constitutes a substantial portion of the region's population. North Florida has a growing Hispanic or Latino population, representing various countries of origin and cultural backgrounds. The region's Asian population is smaller compared to other racial groups but is still a significant and diverse community.

There are also smaller communities of individuals from various other racial and ethnic backgrounds, contributing to the overall diversity of the region.

Figure 2-10 Race Distribution, 2021 (ACS Estimates)



The region has a **16% higher white population** and a **10% lower two or more race population** when compared to Florida.



Duval County has the most diverse population, whereas **Nassau** and **St. Johns** have the least diverse populations.

Table 2-2 Race Distribution, 2021 (ACS)

Race	Florida	Region	Clay	Duval	Nassau	St. Johns
White	56.1%	**71.8%**	69.4%	51.5%	85.2%	81.2%
Black	15.1%	**11.5%**	8.9%	28.8%	3.6%	4.6%
Asian	2.8%	**3.5%**	3.8%	4.8%	1.5%	3.8%
Other	6.9%	**3.5%**	5.5%	4.0%	2.4%	1.4%
Two or More Races	19.1%	**9.8%**	12.4%	10.4%	7.3%	8.9%
Total	100%	**100%**	100%	100%	100%	100%

2.3 Age Distribution

North Florida has a varied age distribution. It is home to a significant number of retirees who are attracted to the area's warm climate, recreational opportunities, and amenities. However, the region also has a growing younger population, driven by factors such as employment opportunities, education, and family dynamics.

Table 2-3 Median Age, 2021 (ACS)

MEDIAN AGE	UNITED STATES	FLORIDA	REGION	CLAY	DUVAL	NASSAU	ST. JOHNS
2021	38.8	42.8	42.3	40.9	36.8	46.9	44.4

Table 2-4 Age Detail, 2021 (ACS)

Age Detail	Under 5	Ages 5 to 18	Ages 18 to 65	Above 65
Florida	5.0%	14.7%	59.2%	21.1%
Region	**5.2%**	**16.5%**	**59.1%**	**19.3%**
Clay	4.8%	18.2%	59.9%	17.1%
Duval	6.4%	16.2%	62.5%	14.9%
Nassau	5.2%	13.9%	56.4%	24.%
St. Johns	4.3%	17.5%	57.6%	20.6%

Region Median Age (2021)

42.3

The region has a **slightly higher youth population percentage (under 18)** than Florida and conversely has a **slightly smaller older population (above 65).**

Nassau County has the highest concentration of **older population** (24.5%). **Clay and Duval** counties have the highest concentrations of the **under 18 population**, with 23.0% and 22.6%, respectively.

Figure 2-12 2021 Age Distribution, Region

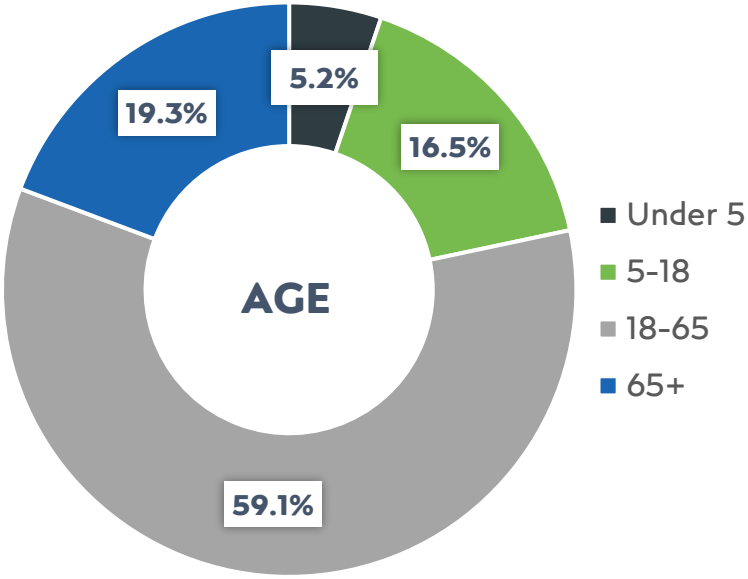
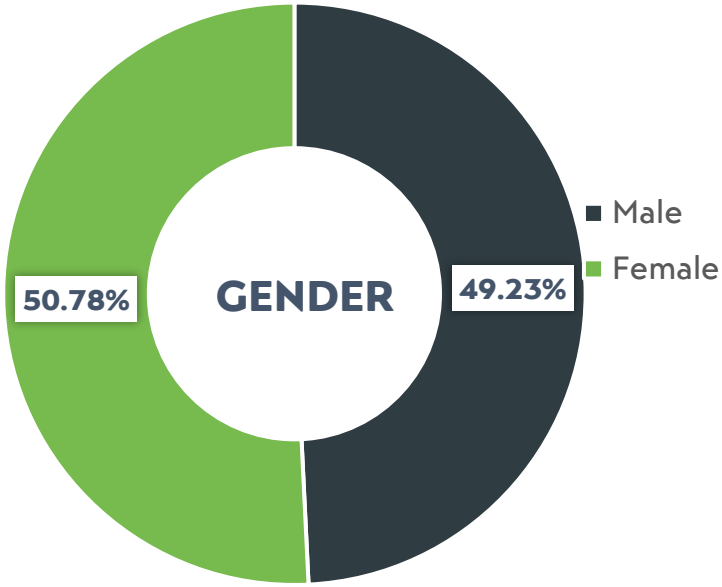


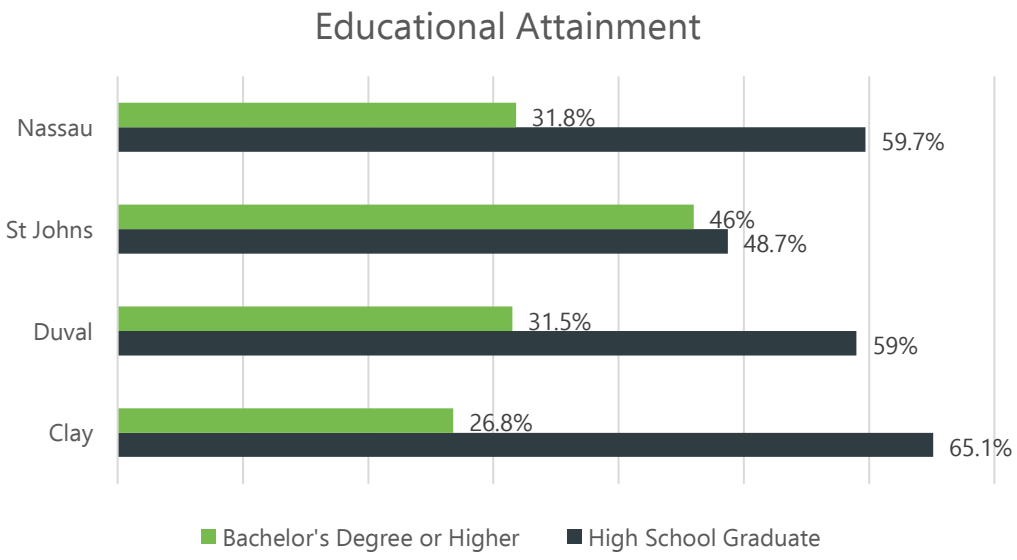
Figure 2-11 2021 Gender Distribution, Region



2.4 Educational Attainment

Educational attainment levels in North Florida vary across the population. The region is home to several higher education institutions, which contribute to the educational landscape. However, variations in educational attainment are based on factors such as age, income levels, and access to educational resources.

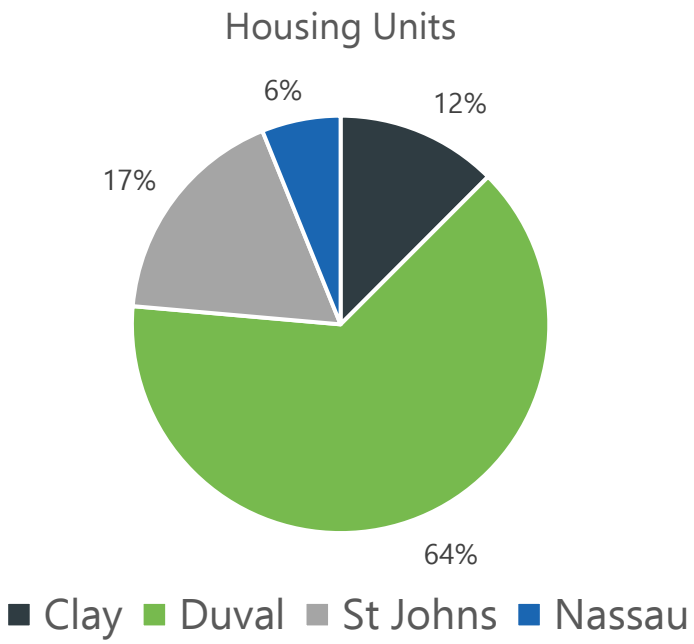
Figure 2-13: Educational Attainment by County



2.5 Household Composition

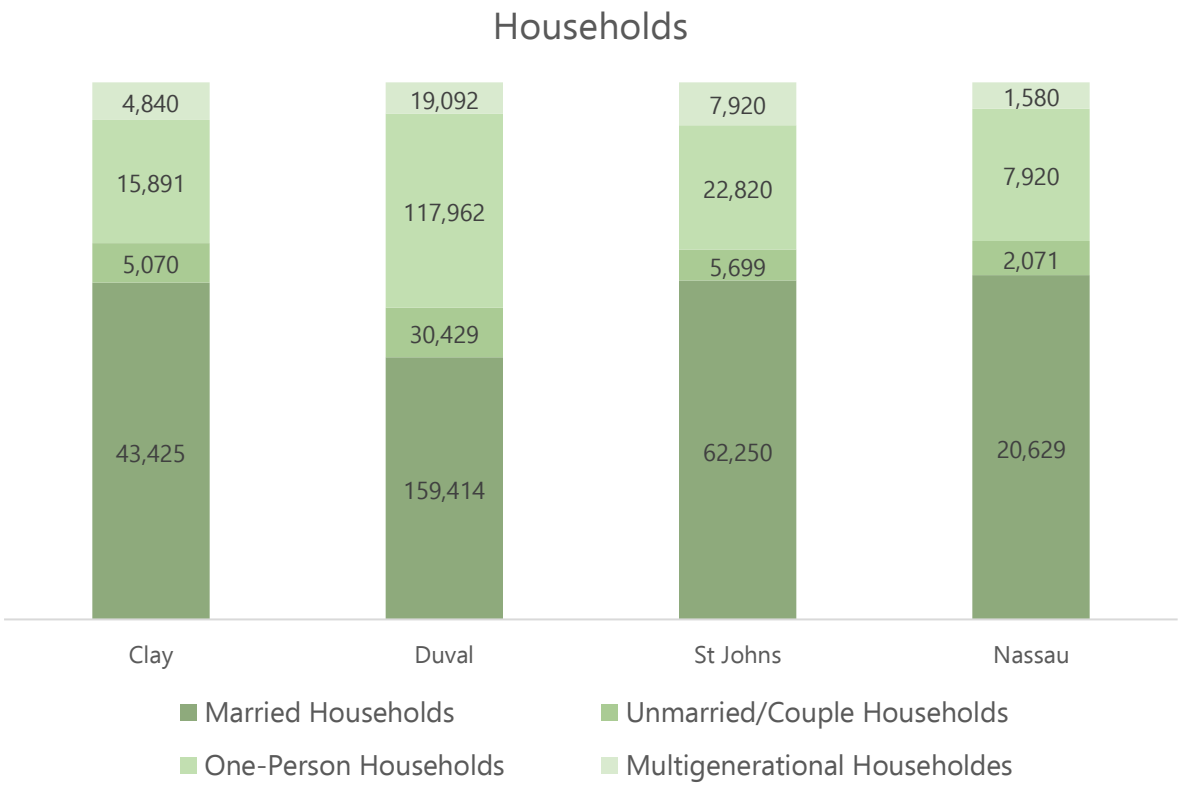
Household composition in North Florida reflects a mix of family households, single-person households, and multi-generational households. The region has a range of residential options, from suburban neighborhoods with single-family homes to urban areas with apartments and condominiums.

Figure 2-14: Percentage of Housing Units by County



Source: US Census Bureau

Figure 2-15: Household Types



Source: US Census Bureau

Zero Car Households

A zero-car household, also known as a car-free household, refers to a living arrangement in which the residents do not own or rely on personal automobiles for their transportation needs. Instead, they use alternative means of transportation to get around.

Table 2-5 Zero Car Households (2021, ACS)

ZERO CAR HOUSEHOLDS	UNITED STATES	FLORIDA	REGION	CLAY	DUVAL	NASSAU	ST. JOHNS
2021	8.0%	5.9%	**3.8%**	3.5%	6.2%	2.8%	2.7%

Regional Zero Car Households (2021)	Florida Zero Car Households (2021)
3.8%	**5.9%**

About **36% less zero car households** are within the region when compared to Florida, and **52% fewer** when compared to the United States.

Duval County had the most zero car households within the region, with 6.2%. **Nassau and St. Johns counties had the fewest**, with about 2.75%.

2.6 Income Levels

According to the US Census Bureau, income is the gauge many use to determine the well-being of the US population. To provide insight into the income, poverty, and employment trends within the North Florida TPO region, general economic data points are presented and summarized in this section. The data presented in this section is from the ACS DP03 Selected Economic Characteristics 2021 1-Year Estimates.

Income levels in Northeast Florida can vary across the population. The region includes a mix of middle-income households, higher-income professionals, and lower-income individuals. Economic factors, industry composition, and job opportunities contribute to income distribution within the region.

Nearly one (1) in seven (7) persons under 18 lived in poverty in North Florida in 2020 exceeding the goal of Florida Chamber's for 10% or fewer children living in poverty. Poverty within the region has declined since its peak in 2012. Job growth in 2021 and 2022 continues to reduce poverty in North Florida.

Table 2-6 Median Income, 2021 (ACS)

MEDIAN HOUSEHOLD INCOME	UNITED STATES	FLORIDA	REGION	CLAY	DUVAL	NASSAU	ST. JOHNS
2021	$69,717	$63,062	**$76,061**	$76,679	$59,980	$75,981	$91,602

Regional Median Household Income (2021)

$76,061

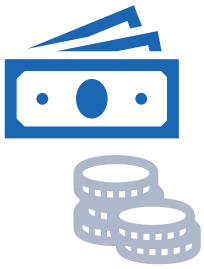
Florida Median Household Income (2021)

$63,062

Table 2-7 Median Income, 2021 Comparisons

LOCATION	MEDIAN HOUSEHOLD INCOME	PERCENT CHANGE WHEN COMPARED TO:		
		UNITED STATES	FLORIDA	REGION
Region	**$76,061**	**9.1%**	**20.6%**	**-**
Clay	$76,679	10.0%	21.6%	0.8%
Duval	$59,980	-14.0%	-4.9%	-21.1%
Nassau	$75,981	9.0%	20.5%	-0.1%
St. Johns	$91,602		45.3%	20.4%

The **region** has a **20.6% higher median household income** than Florida and **9.1%** than the United States.



St. Johns County's median household income is **20.4% higher** than the region, whereas **Duval County** is **21.1% lower** than the region.

Regional Population Below Poverty Line (2021)

9.8%

Florida Population Below Poverty Line (2021)

13.1%

Figure 2-16 Regional Median Household Income from 2010-2021 (ACS)

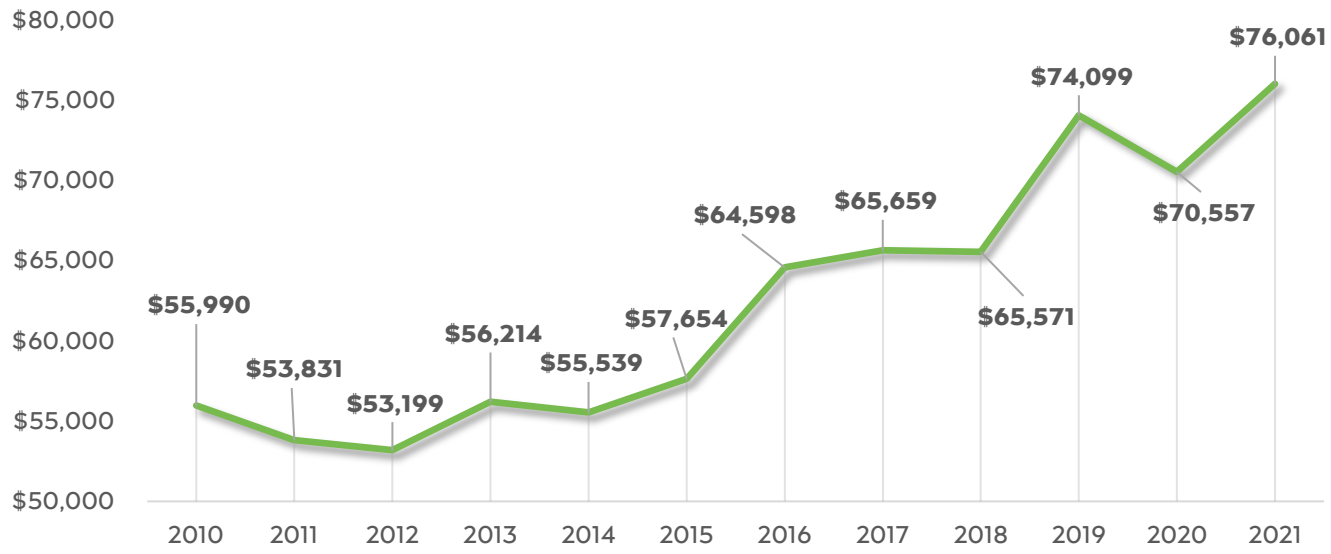


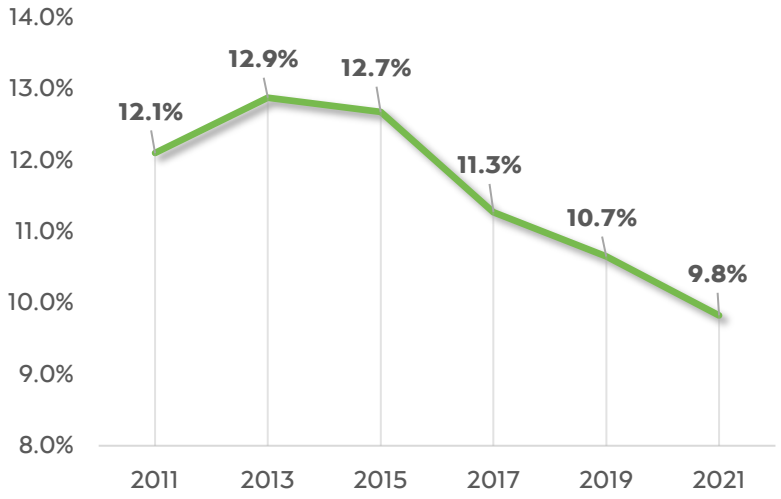
Table 2-8 Percent Population Below Poverty Level, 2021 (ACS DP03)

POPULATION BELOW POVERTY	UNITED STATES	FLORIDA	REGION	CLAY	DUVAL	NASSAU	ST. JOHNS
2021	12.8%	13.1%	**9.8%**	7.1%	15.0%	11.4%	5.1%

Table 2-9 Unemployment Rate, 2021 (ACS)

UNEMPLOYMENT RATE	UNITED STATES	FLORIDA	REGION	CLAY	DUVAL	NASSAU	ST. JOHNS
2021	6.3%	5.6%	**3.0%**	2.1%	4.6%	1.9%	3.5%

Figure 2-17 Regional Poverty Trends, 2011-2021 (ACS)



The **region** has **a lower** population below the poverty line **than Florida** and has seen a **decrease** in poverty **over the past ten years**.

Regional Unemployment Rate (2021)

3.0%

Florida Unemployment Rate (2021)

5.6%

Table 2-10 Unemployment Rate, 2021 Comparisons

LOCATION	UNEMPLOYMENT RATE
United States	**6.3%**
Florida	**5.6%**
Region	**3.0%**
Clay	2.1%
Duval	4.6%
Nassau	1.9%
St. Johns	3.5%

The **region** has a **lower unemployment rate** than Florida and a **significantly lower unemployment rate** than the United States.

Nassau and **Clay** counties have the **lowest** unemployment rates of the region at **1.9%** and **2.1%.**

Duval County has the **highest** unemployment rate of the region with **4.6%.**

Table 2-11 Employment by Occupation, 2021 (ACS)

OCCUPATION	UNITED STATES	FLORIDA	REGION	CLAY	DUVAL	NASSAU	ST. JOHNS
Management, busin., science, arts	42.2%	39.0%	**44.1%**	43.9%	40.5%	42.8%	49.1%
Service	16.1%	18.0%	**15.9%**	15.1%	16.6%	18.1%	13.8%
Sales and office	20.0%	23.0%	**22.6%**	21.1%	23.0%	21.9%	24.5%
Nat. resources, const., maint.	8.5%	9.1%	**7.2%**	7.1%	7.5%	7.8%	6.5%
Production, transp, material Moving	13.1%	10.9%	**10.2%**	12.8%	12.4%	9.4%	6.2%

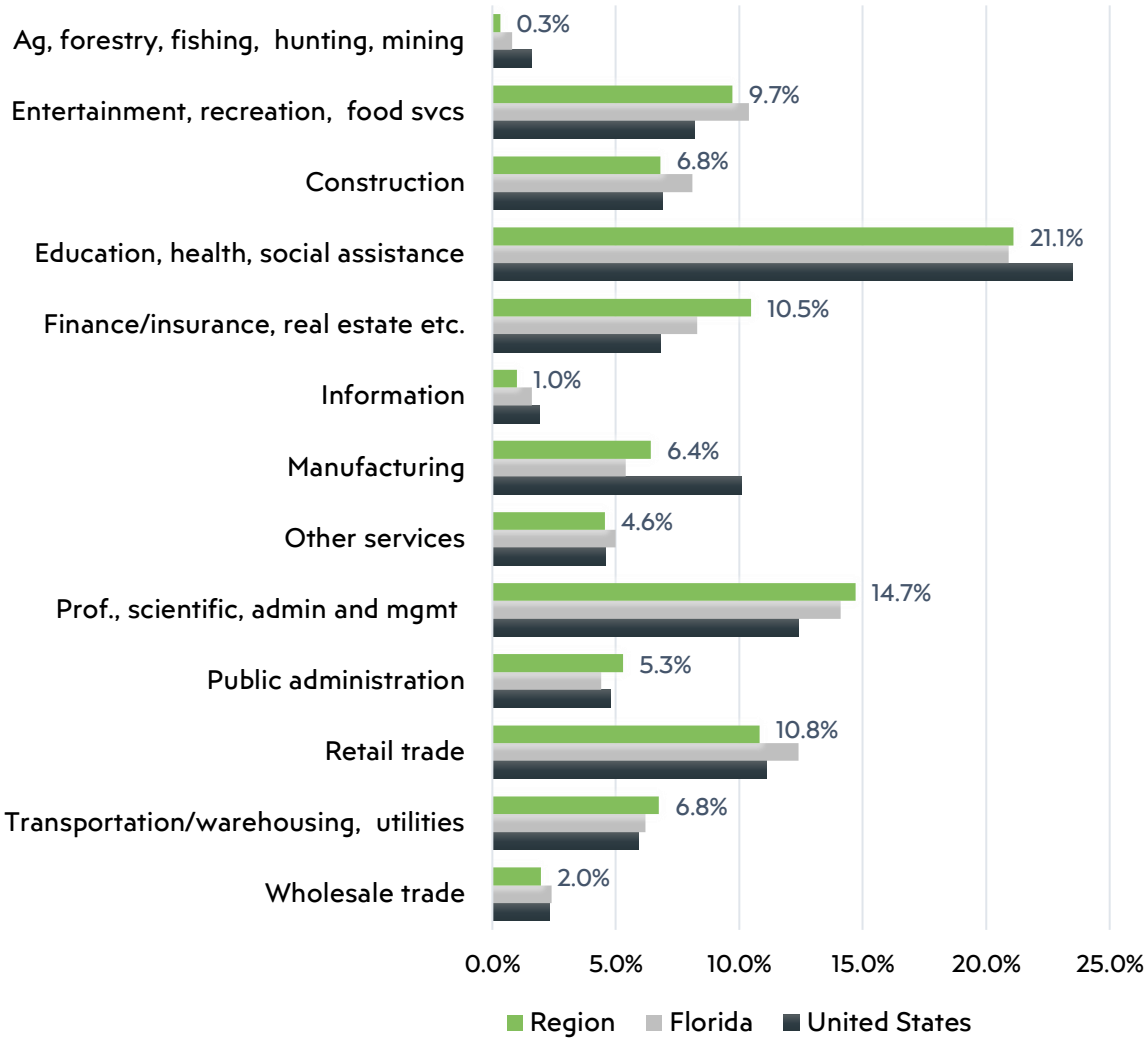
The **region** is generally on trend with Florida and the US when it comes to occupation distribution. There are slightly more management-type occupations within the region and fewer natural resources and service occupations.

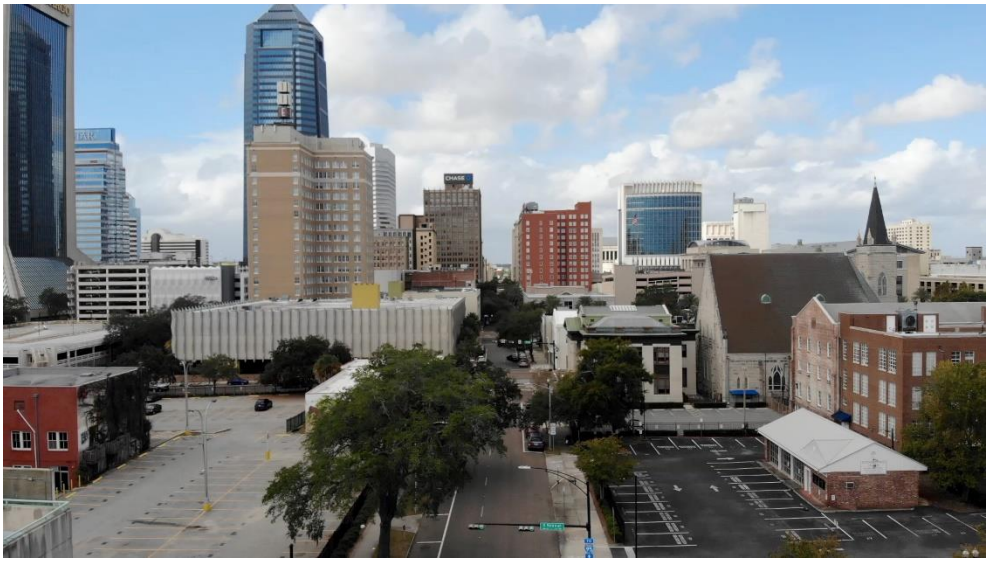
#1 Occupation:
Management/Business

Top 3 Industries:
Education & Health, **Professional**, and **Retail**

The region outpaces the **Finance and Real Estate industry** with 35% more jobs in that industry than the US and 21% more jobs than in Florida.

Figure 2-18 Employment by Industry, 2021 (ACS)



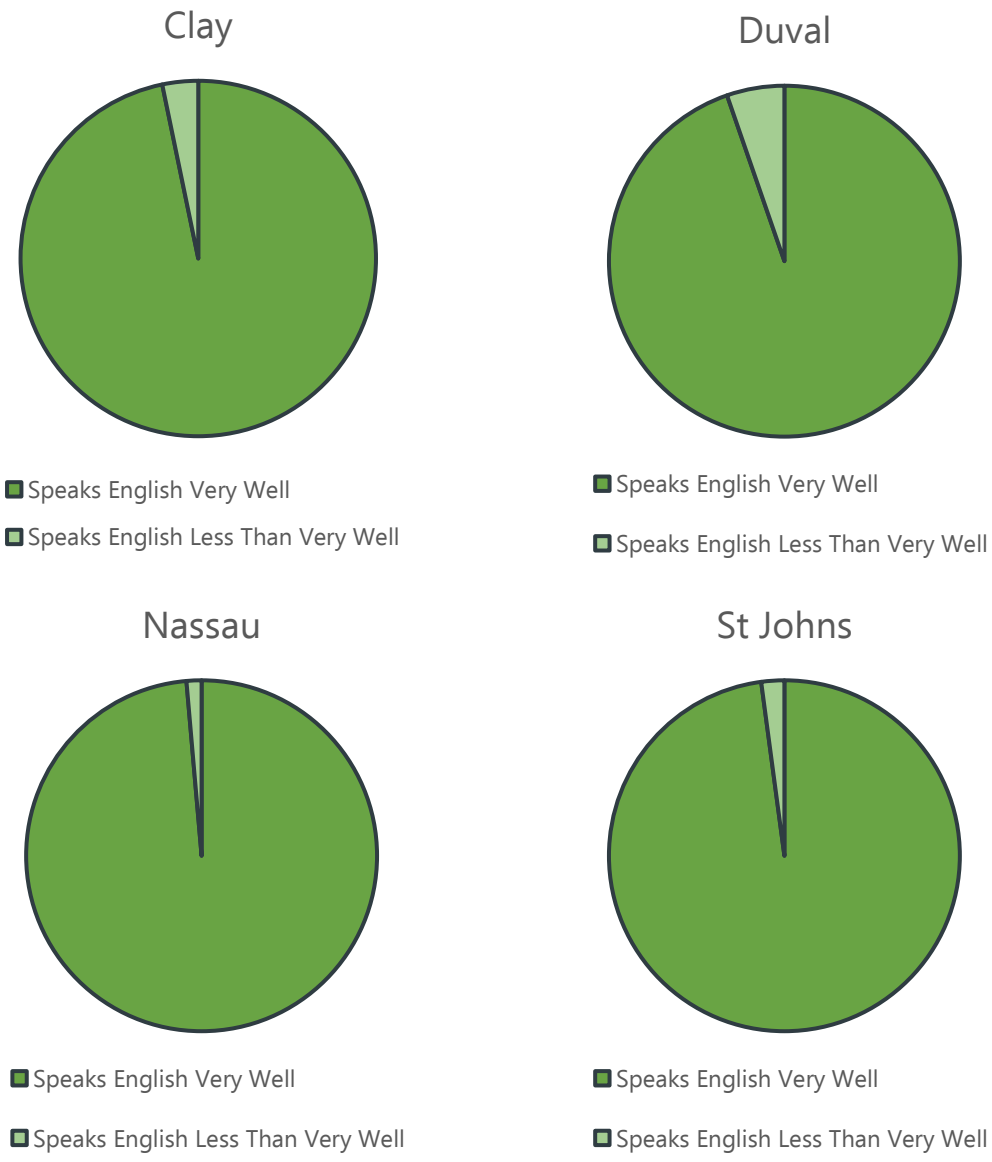


2.7 Cultural and Linguistic Diversity

Northeast Florida benefits from a rich cultural and linguistic diversity, influenced by the various ethnic groups and immigrant populations residing in the area. This diversity contributes to cultural events, festivals, and culinary offerings. This region has a rich history that includes Indigenous peoples, European settlers, African Americans, and other diverse cultural groups and plays a significant role in shaping its cultural diversity today.

Demographic data for the number of LEP persons in Clay, Duval, Nassau, and St. Johns Counties who are eligible to be served, likely to be served, or likely to be encountered by the TPO through participation in the transportation planning process has been collected and analyzed.

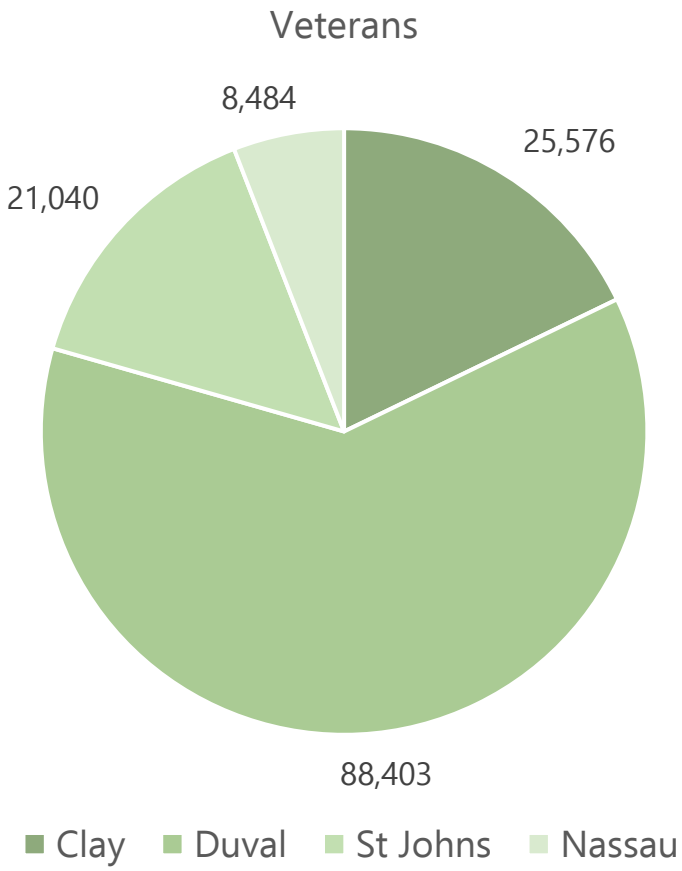
Figure 2-19: Limited English Proficiency



2.8 Veteran Population

Northeast Florida has a notable veteran population due to the presence of military bases and installations in the area. Veterans and military families contribute to the region's demographics and may have unique needs and preferences.

Figure 2-20: Veterans by County



Source: US Department of Veterans Affairs

3.0 Economics

The greater Jacksonville area has a diverse and growing economy. Here are some key aspects of the economics of Northeast Florida:

Diversified Industries: The economy of Northeast Florida is characterized by a range of industries. Key sectors include healthcare, finance, insurance, logistics, manufacturing, technology, defense, tourism, and construction. The region has a balanced mix of both established industries and emerging sectors, which contributes to its economic stability and resilience.

Port and Logistics: The Port of Jacksonville (JAXPORT) is a significant driver of the regional economy. It supports trade and logistics activities, facilitating the import and export of goods and serving as a major transportation hub. The presence of JAXPORT attracts related industries, including warehousing, distribution centers, and logistics companies, which contribute to job creation and economic growth.

Financial and Insurance Services: Jacksonville is home to a growing financial services sector, with numerous banks, investment firms, and insurance companies located in the area. The city serves as a regional hub for banking and finance, providing a wide range of financial services to individuals and businesses.

Manufacturing: Northeast Florida has a strong manufacturing presence, particularly in the aerospace, defense, and automotive industries. The region is home to several aerospace manufacturing and assembly facilities, including those related to aircraft parts and defense systems. The automotive industry also plays a significant role, with automotive manufacturing plants and suppliers contributing to the local economy.

Healthcare: The healthcare sector is a major economic driver in Northeast Florida. The region boasts several world-class medical centers, hospitals, research institutions, and specialized healthcare facilities. The healthcare industry provides employment opportunities and attracts patients from across the region and beyond, contributing to the economy.

Tourism and Hospitality: Northeast Florida is a popular tourist destination, attracting visitors with its beaches, golf courses, cultural attractions, and natural beauty. The tourism and hospitality industry generates significant revenue and employment opportunities in areas such as hotels, restaurants, entertainment venues, and recreational activities.

Education and Research: The region is home to several higher education institutions, including the University of North Florida and Jacksonville University. These institutions contribute to the economy through education and research activities, fostering innovation, and providing a skilled workforce.

Small Business and Entrepreneurship: Northeast Florida has a vibrant small business and entrepreneurial ecosystem. The region supports the growth of startups and small businesses through various resources, including incubators, accelerators, and networking opportunities. Small businesses play a crucial role in job creation and innovation, contributing to the overall economic vitality of the area.

Workforce and Labor Market: The availability of a skilled workforce is crucial for the economic development of Northeast Florida. The region benefits from its proximity to educational institutions, which provide a pipeline of skilled professionals. Efforts are made to align workforce training programs with the needs of local industries, ensuring a well-prepared workforce.

4.0 Land Use

Northeast Florida has a diverse range of land uses that cater to residential, commercial, industrial, recreational, and institutional needs. Here are some key aspects of land use in the greater Jacksonville area the region encompasses a mix of urban, suburban, and rural residential neighborhoods. Urban areas like downtown Jacksonville feature a combination of high-rise condominiums, apartment buildings, and townhouses. Suburban areas consist of single-family homes, townhomes, and planned communities. The rural areas outside the city often comprise larger lots with agricultural or low-density residential uses.

The greater Jacksonville area boasts a variety of commercial and retail developments. Downtown Jacksonville serves as the central business district and is home to office buildings, corporate headquarters, government institutions, and financial centers. The region also features numerous shopping centers, malls, and retail corridors throughout various suburban areas, offering a wide range of shopping, dining, and entertainment options.

The area is known for its robust industrial and warehousing sector. Industrial parks and distribution centers are located in strategic locations near major transportation routes, such as highways and rail lines. These facilities cater to manufacturing, logistics, and distribution activities, contributing to the region's economic growth and job creation.

The greater Jacksonville area is home to various institutional and government facilities. These include educational institutions, such as colleges, universities, and schools, as well as hospitals, medical centers,

and research facilities. Government buildings, including city and county offices, courthouses, and public safety facilities, are also dispersed throughout the region.

The Jacksonville area offers a range of recreational and open spaces for residents and visitors. It boasts numerous parks, nature preserves, and waterfront areas, providing opportunities for outdoor activities, sports, and leisure. Notable recreational attractions include Jacksonville Beach, St. Johns River, Amelia Island, and the extensive park system that includes parks like the Jacksonville Arboretum and Gardens and the Timucuan Ecological and Historic Preserve.

5.0 Planning Assumptions

5.1 Growth Trends

Northeast Florida has experienced significant growth and development over the past few decades. The region has become an attractive destination for businesses and residents alike. Several key factors contribute to the growth trends in Northeast Florida:

Population Growth: The population of Northeast Florida has been steadily increasing over the years. Jacksonville, the largest city in the region, has seen substantial population growth, fueled by both domestic migration and international immigration. The area's warm climate, diverse economy, and affordable housing options have made it an appealing place to live for individuals and families.

Economic Expansion: Northeast Florida has witnessed strong economic expansion, attracting a range of industries and businesses. Jacksonville, in particular, has become a hub for finance, insurance, healthcare, logistics, and manufacturing. The city's deep-water port, transportation infrastructure, and access to major highways make it an attractive location for companies looking to establish regional headquarters or distribution centers.

Job Opportunities: The growth of various industries has created a plethora of job opportunities in Northeast Florida. Major employers in the region include financial institutions like Bank of America and Wells Fargo, healthcare providers such as Mayo Clinic and Baptist Health, and military bases like Naval Station Mayport and Naval Air Station Jacksonville. Additionally, the presence of universities and research institutions has helped foster innovation and entrepreneurship.

Tourism and Recreation: Northeast Florida's coastal location and natural beauty make it a popular destination for tourists and outdoor enthusiasts. St. Augustine, the oldest continuously inhabited European-established settlement in the United States, attracts visitors with its historic charm. The region's miles of sandy beaches, state parks, and recreational opportunities, including boating, fishing, and golfing, contribute to its appeal.

Infrastructure Development: Northeast Florida has invested in infrastructure development to support its growing population and economy. Major projects include the First Coast Outer Beltway, expansions of the Jacksonville International Airport, and the development of the Jacksonville Port Authority's Blount Island Marine Terminal. These infrastructure enhancements facilitate connectivity, trade, and commerce in the region.

However, with growth also come challenges that need to be addressed. Some key concerns in Northeast Florida include managing urban sprawl, improving transportation systems, preserving

natural resources, and ensuring equitable access to housing, education, and healthcare services for all residents.

Northeast Florida has experienced significant growth driven by population influx, economic expansion, job opportunities, tourism, and infrastructure development. As the region continues to evolve, it will be essential to manage growth effectively and address associated challenges to maintain a high quality of life for residents and sustain long-term economic prosperity.

5.2 Roadways

Northeast Florida is served by several major roadway facilities. These include interstate and arterial roadways.

Interstate 95

Interstate 95 is the backbone of eastern Florida's transportation system and a critical resource for the region's economic vitality as a component of Florida's Strategic Intermodal System (SIS). I-95 runs from Miami, Florida north along the eastern Florida Coast to Jacksonville and it continues north to the Canadian border. I-95 provides quick and convenient highway travel between dozens of cities located along Florida's east coast. I-95 directly connects the largest cities located along Florida's east coast, including Jacksonville, West Palm Beach, and Miami. The I-95 Florida corridor also indirectly connects most of the smaller cities located along the Florida coastline. I-95 is a vital part of Florida's economy serving the needs of local commuters, shipping companies and tourists alike.

Interstate 295

I-295 is the beltway around central Jacksonville. The 60.9-mile-long beltway consists of two segments, the West Beltway and the East Beltway, with I-95 serving as the dividing line between the two. Tolled express lanes have been constructed from Exit 58 at I-795/SR 9B to Exit 53 at J. Turner Butler Boulevard (SR-202). The project also provides additional non-tolled general-purpose lane in each direction between SR 9B and JTB (for a total of three contiguous general-purpose lanes along the entire section, eliminating the current lane drops at the Baymeadows Road and Gate Parkway interchanges).

Interstate 10

I-10 is the major east/west interstate highway in north Florida. Beginning in downtown Jacksonville at I-95, I-10 runs west through Duval County. It serves as a commuter route for residents of Baker and Clay Counties working in Jacksonville and it is a major freight corridor connecting to I-95, and I-75 in northeast Florida.

U.S. Route 1 (US-1)

US-1 is a major north-south federal highway that runs parallel to the Atlantic Ocean coast. In the Jacksonville area, it runs concurrently with I-95, serving as a local alternative to the interstate. US-1 connects Jacksonville with other coastal cities and towns in Florida and extends up to Maine.

U.S. Route 17 (US-17)

US-17 is another important north-south federal highway that passes through the greater Jacksonville area. It runs alongside the St. Johns River and connects Jacksonville with other cities in Florida, such as Orange Park, Palatka, and Green Cove Springs.

State Road 9A (SR-9A)

SR-9A is a limited-access highway that provides a northern bypass around downtown Jacksonville. It connects with I-295, I-10, and I-95, offering an alternate route for local and through traffic.

State Road 202 (J Turner Butler Boulevard)

State Road 202, commonly known as J.T. Butler Boulevard or JTB, is a major east-west highway extending from Interstate 95 (I-95) in the eastern part of Jacksonville to Florida State Road A1A (SR A1A) near Jacksonville Beach. It also connects with the Interstate 295 beltway, providing access to various parts of the city. J.T. Butler Boulevard experiences significant traffic volumes, especially during peak hours and tourist seasons. It is a major commuter route for those living in the eastern parts of Jacksonville, as well as visitors heading to the beach areas.

State Road 200 (A1A)

State Road 200 (SR 200) in Nassau County, Florida, is a major east-west highway that runs through the county, connecting several communities and providing important transportation access. SR 200 extends east-west through Nassau County, starting from the western border with Baker County and continuing eastward until it reaches Amelia Island near the Atlantic coast.

First Coast Outer Beltway (SR 23)

The First Coast Expressway (FCE, SR 23) is a multi-lane, limited-access toll road that, once completed, will cross parts of Duval, Clay, and St. Johns counties. Expressway traffic will pass through electronic toll gantries without stopping. The gantries will contain an electronic system that will either detect the vehicle's SunPass transponder device or scan the vehicle's license plate for a toll-by-plate invoice in the mail. The total length of the proposed roadway is approximately 46 miles. The FCE will reduce congestion on other major roadways in the region, important not only for daily commuters but also critically important during times of storm-related evacuation.

Construction on the northwestern, first segment of the FCE (Blanding Boulevard/SR 21 in Clay County north to I-10/US 90 in Duval County) began in 2013 and was completed in the summer of 2019, with toll collection beginning July 13, 2019.

FCE
FIRST COAST EXPRESSWAY
Florida Department of Transportation

The central, second segment of the FCE project involves a new roadway from Blanding Boulevard/SR 21 in Middleburg running south and then east through Green Cove Springs and includes a new bridge over Black Creek near the Byron Road/Lake Asbury community.

The second segment is being divided into two separate projects:

- The north project (FIN 422938-6), which runs from north of SR 16 to north of SR 21, will be built by Sacyr Construction for $230 million. Construction began in March 2019 and is expected to be completed in 2025, weather and schedule permitting.
- The south project (FIN 422938-5), which runs from east of CR 209 to north of SR 16, will be built by Superior Construction for $180 million. Construction began in April 2019 and is expected to be completed in 2025, weather and schedule permitting.

The third segment of the FCE consists of:

- A new bridge over the St. Johns River just south of the existing Shands Bridge (FIN 422938-7), beginning construction in 2023 and estimated for completion in 2030 at a cost of approximately $595 million.
- A new roadway from east of the County Road 16A Spur to I-95 in St. Johns County (FIN 422938-8), with a final construction start date to be determined and completion estimated in 2030.

These are just a few examples of the major roadways in Northeast Florida. The region also has an extensive network of state roads, county roads, and local streets that serve the needs of residents and businesses, ensuring efficient transportation throughout the region.

5.3 Public Transportation

Jacksonville Transportation Authority

Public transportation in the Jacksonville area primarily consists of bus services operated by the Jacksonville Transportation Authority (JTA). The JTA bus network plays a vital role in providing public transit options to residents and visitors. The JTA is the independent agency responsible for public transit in the region. JTA has several types of bus service, local bus service, Express Bus service, Bus Rapid Transit (BRT) service, paratransit service, and the Jacksonville Skyway.

The JTA Bus system comprises multiple bus routes that cover a significant portion of the greater Jacksonville area. The routes are designed to provide access to key destinations such as downtown Jacksonville, major employment centers, educational institutions, medical facilities, and shopping areas. The bus services operate on weekdays and weekends, with varying schedules.

The JTA has introduced the First Coast Flyer Bus Rapid Transit (BRT) system, which offers enhanced bus services on certain routes. The BRT system incorporates features such as dedicated bus lanes, off-board fare collection, and transit signal priority to improve the efficiency and speed of bus travel.

Jacksonville also has the Skyway Automated People Mover, an automated people mover system. The Skyway operates on an elevated track and serves downtown Jacksonville, connecting key locations such as the Jacksonville Transportation Center, the Prime F. Osborn III Convention Center, and various office buildings. However, it has a limited reach and is primarily designed for short-distance transportation within the downtown area. The skyway is being reworked into the Ultimate Urban Circulator (U2C).

The Ultimate Urban Circulator (U2C) is a comprehensive program to modernize and expand the Skyway and introduce autonomous vehicles (Avs) into JTA's transportation system. By transforming the current Skyway, extending the reach within the urban core through the Bay Street Innovation Corridor and expanding beyond into adjacent neighborhoods, U2C supports the vision of a vibrant, revitalized and better-connected Downtown Jacksonville.

The JTA is also developing the Bay Street Innovation Corridor (BSIC) project will introduce Autonomous Vehicles (Avs), initially operating in mixed traffic in curbside lanes along Bay Street, for approximately three miles, from Pearl Street (East) to EverBank Stadium, extending west to east through the Jacksonville Urban Core.

The JTA provides paratransit services, known as Connexion, for individuals with disabilities who are unable to use fixed-route bus services. Connexion operates on a reservation basis, offering door-to-door transportation within specific service areas.

Future Transportation Initiatives: The Jacksonville area has been exploring future transportation options to improve public transit. These initiatives include studying the feasibility of a downtown Jacksonville streetcar system, expanding the BRT network, and exploring the potential for commuter rail service.

Nassau TRANSIT
Powered by Nassau County Council on Aging

NassauTRANSIT is the public transportation provider for Nassau County and is operated by the Nassau County Council on Aging (NCCOA). As the State of Florida-designated Community Transportation Coordinator for Nassau County, NassauTRANSIT partners with the Nassau County School District and the Florida Department of Health, as well as Barnabas Center, Starting Point Behavioral Healthcare, Salvation Army Hope House and the YMCA to meet public transportation needs. NassauTRANSIT is also a member of the Partnership for a Healthier Nassau, an initiative of the Florida Department of Health. As the newly designated Fernandina-Yulee Urban Area begins to take shape, additional transit revenues will become available. The NCCOA and the JTA could begin a partnership that expands transit opportunities for the area.

The Sunshine Bus Company

The Sunshine Bus Company, also known as the Sunshine Bus, is a public transportation service operated by the St. Johns County Council on Aging (COA) in St. Johns County, Florida. The service primarily focuses on providing transportation options for seniors, individuals with disabilities, and the general public who may not have access to private transportation.

The Sunshine Bus Company operates a fleet of buses that serve various routes within St. Johns County, including residential areas, commercial centers, medical facilities, and other key destinations. The buses are equipped with accessibility features to accommodate passengers with mobility challenges, such as wheelchair ramps or lifts.

5.4 Freight and Logistics

Northeast Florida is known for its extensive freight rail facilities, which play a significant role in the region's transportation and logistics industry. Here are some key points about the freight rail facilities in the greater Jacksonville area:

Railroads: Several major railroad companies operate in the region, including CSX Transportation, Norfolk Southern Railway, and the Florida East Coast Railway (FEC). These Class I railroads provide vital freight transportation services and maintain extensive rail networks that connect Jacksonville to various destinations across the country.

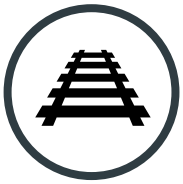
Intermodal Terminals: Jacksonville is home to multiple intermodal terminals, which serve as important hubs for the transfer of freight between different modes of transportation, such as rail, truck, and maritime. The Jacksonville Intermodal Terminal, operated by CSX, is one of the largest intermodal facilities in the region.

Port Facilities: The Port of Jacksonville, located along the St. Johns River, has rail connections to facilitate the efficient movement of cargo. Rail lines link the port with nearby rail facilities, allowing for seamless transfer of goods between ships and trains. The Port of Fernandina is situated on Amelia Island, along the Amelia River. The port is a multi-use facility that handles both cargo and passenger traffic. It primarily serves as a deep-water port, offering berths and facilities for various maritime activities.

Intermodal Connectivity: Jacksonville's strategic location and robust transportation infrastructure make it a vital intermodal hub. The city is well-connected by rail, road, water, and air, allowing for seamless movement of goods. Rail lines operated by CSX, FEC, and Norfolk Southern serve the region, providing connectivity to major markets

throughout the United States. Multiple interstate highways, including I-95 and I-10, intersect in the area, facilitating efficient trucking operations. Jacksonville International Airport serves as a major air cargo gateway.

Logistics and Distribution Centers: North Florida is home to numerous logistics and distribution centers, serving a variety of industries. These facilities benefit from the region's transportation infrastructure and proximity to the port, making it an attractive location for companies involved in e-commerce, retail, manufacturing, and warehousing. Many national and international logistics companies have operations in the area, offering a wide range of services such as freight forwarding, customs brokerage, third-party logistics (3PL), and supply chain management.



Railroad Yards: North Florida has several rail yards that serve as operational bases for train assembly, sorting, and classification. These yards provide storage and maintenance facilities for locomotives and railcars. Notable rail yards in the region include Simpson Yard and Simpson Spur Yard, which are operated by CSX.

Industrial Parks: The Jacksonville region is home to various industrial parks that are strategically located near rail lines. These parks offer rail-served sites and facilities to businesses, enabling efficient transportation of goods and materials. The availability of rail infrastructure in these industrial parks attracts industries that rely on rail transportation for their operations.

Economic Impact: The freight rail facilities in the greater Jacksonville area have a significant economic impact on the region. They support various industries, including manufacturing, distribution, warehousing, and logistics, creating jobs and driving economic growth. The efficient movement of goods through the region supports various industries, including manufacturing, retail, automotive, and aerospace. The presence of reliable logistics infrastructure and services contributes to the overall competitiveness and growth of businesses in the area.

5.5 JAXPORT

JAXPORT, officially known as the Jacksonville Port Authority, is a vital economic engine and one of Florida's busiest seaports. Located along the St. Johns River in Jacksonville, Florida, JAXPORT facilitates international trade, serving as a gateway for global commerce and contributing to the region's economic growth. Here are some key points about JAXPORT:

1. **Location and Infrastructure:** JAXPORT is strategically positioned on the East Coast of the United States, providing direct access to the Atlantic Ocean. It encompasses three marine terminals: the Blount Island Marine Terminal, the Talleyrand Marine Terminal, and the Dames Point Marine Terminal. These terminals handle a wide range of cargo, including containers, automobiles, bulk commodities, and breakbulk cargo. Recently, a harbor deepening project has been completed to increase channel depth to 47' to allow for larger ships.

2. **Container Terminal Operations:** JAXPORT's container terminals, namely Blount Island and Dames Point, specialize in containerized cargo. They have modern facilities equipped with container cranes, storage yards, and advanced technology to efficiently handle containers. These terminals have deep-water berths capable of accommodating large vessels, attracting major container shipping lines and offering regular connections to global markets.

3. **Vehicle Logistics:** JAXPORT is a leading hub for automobile imports and exports, ranking among the top ports in the United States for vehicle handling. The Blount Island and Talleyrand terminals have dedicated facilities for automobile processing, including storage areas, vehicle inspection areas, and specialized equipment for loading and unloading automobiles.

4. **Bulk and Breakbulk Cargo:** In addition to containerized and automobile cargo, JAXPORT handles various bulk and breakbulk commodities. The port has facilities for handling bulk materials such as liquid bulk (petroleum, chemicals), dry bulk (grains, minerals), and breakbulk cargo (forest products, machinery). Specialized berths and warehouses are available for efficient handling of these types of cargo.

5. **Intermodal Connectivity:** JAXPORT offers excellent intermodal connectivity, enabling seamless transportation of goods. The port has direct rail connections to major Class I railroads, including CSX and Norfolk Southern, allowing for efficient inland distribution of cargo. Additionally, JAXPORT is well-connected to the interstate highway system, with convenient access to I-95 and I-10, facilitating trucking operations.

6. **Economic Impact:** JAXPORT plays a vital role in the regional economy, supporting thousands of jobs and generating substantial economic activity. It serves as a catalyst for business growth

and attracts industries that rely on efficient international trade and logistics. The port's operations and the related maritime activities contribute to the creation of direct and indirect employment opportunities.

7. **Environmental Stewardship:** JAXPORT is committed to sustainable and environmentally responsible practices. It actively works to minimize its impact on the environment, implements green initiatives, and promotes eco-friendly programs. These efforts include emission reduction measures, wildlife protection initiatives, and the use of renewable energy sources. Currently, electric cranes are being installed by JAXPORT to increase energy efficiency and reduce emissions from diesel-powered cranes.

5.6 Port of Fernandina

The Port of Fernandina, which is owned by the Ocean Highway and Port Authority (OHPA) of Nassau County and operated by a third-party Terminal Operator, is a rail-served, natural deepwater port on the Atlantic Coast. The Port is on the Amelia River and is in the City of Fernandina Beach in Northeast Florida. The Port property consists of approximately 23 acres including 1,200 linear feet of berth space, outdoor yard storage and three primary transit sheds. The Port handles a variety of breakbulk cargoes, including paper and forest products, steel, aluminum, chemicals, and machinery, as well as dry bulk commodities and containers.

The Port of Fernandina is located on the northwestern side of Amelia Island in NE Florida. The facility is located within the City of Fernandina Beach along the Amelia River approximately two miles from the Atlantic Ocean, in Nassau County. The Port property consists of approximately 23 acres which is bordered by development patterns including residential, industrial, and commercial on all sides apart from the wharf.

Due to its location, the Port is subject to development policies set forth by the City of Fernandina Beach (principally Ordinance 2021-29), the Community Redevelopment Area (CRA) and the adjacent Historic District. The Port has parcels both adjacent to and within the CRA and Historic Districts, subjecting them to further requirements of viewshed, building height, and access. These limitations discourage expanding the terminal area into adjacent properties. The majority of the Port's property is under use; however, the proposed industrial developments located near Callahan (e.g., the Crawford Diamond Development) and along the US 17 corridor offer opportunities expanding operations inland and not directly at the Port terminal facility. Use of these external properties may allow the Port to expand or modify operations without encroaching into the protected adjacent properties.

Since 2004, cargo tonnage moving by water at the Port of Fernandina has displayed a strong growth period between 2004 and 2011, reaching a record level in 2011. Waterborne cargo plummeted from

2011 through 2014, rebounded between 2015 and 2018, and grew significantly between 2019 and 2021. The decline in 2012 was due in part to the reduction in steel being provided for the Panama Canal expansion project through the Port and discontinuing Seaboard and Schuyler services. Non-containerized cargo, primarily breakbulk cargo, has dominated the volume of cargo handled at the Port. The significant growth in cargo from 2019 reflects the change in terminal operating companies in 2018, as Nassau Terminals, LLC (a subsidiary of Kinder Morgan) was acquired by Worldwide Terminals Fernandina and began to focus on the forest products cargoes.

Trucking Considerations

The Port has identified that its current limitations of warehousing, rail, and cargo movements (limited available shipping services/routes) lead to local businesses shipping much of their freight north to the Port of Savannah, Port of Charleston, or south to the Port of Jacksonville. This leads to significant mileage put on trucks causing congestion and emissions that could otherwise be reduced. Coordination with on-island industries and their freight-related needs should be considered in the future. combining additional off-terminal warehousing and modifying scheduling (truck, rail, and ship) with the potential to coordinate intermodal transfer centers may allow the Port to better serve the latent demand from these industries. The Terminal Operator should also explore using gate scheduling software to assist in reducing truck queuing and better scheduling arriving trucks.

5.7 Jacksonville International Airport (JIA)

JAX | Jacksonville International Airport

JIA serves as the primary commercial service airport and is the gateway to Northeast Florida. The Airport is situated approximately 15 miles north of downtown Jacksonville, in Duval County, Florida. It covers approximately 7,911 acres. The Airport is surrounded by Interstate 95 (I-95) to the east, Interstate 295 to the south, and Lem Turner Road (State Road 115) to the west.

JIA also supports the general aviation community, with two fixed-base operators (FBO), Sheltair Aviation Services and Signature Flight Support, located at the Airport. Additionally, the Airport is home to several cargo operators and freight forwarders, including the United Parcel Service (UPS), Federal Express (FedEx), Suburban Air Freight, and Mountain Air Cargo.

The FANG 125th Fighter Wing is also based at JIA. The 125th Fighter Wing operates an armed fleet of F-15 military aircraft. Its mission is "to provide air defense for the southeastern United States, as directed by the North American Aerospace Defense Command (NORAD) and United States Northern Command (USNORTHCOM), from Charleston, South Carolina, to the southern tip of Florida and across the Florida panhandle."

JIA is one of four public-use airports owned and operated by the JAA. The other three airports are Jacksonville Executive at Craig Airport (CRG), Herlong Recreational Airport (HEG), and Cecil Airport (VQQ). JIA is currently the only airport within the Jacksonville Aviation Authority's (JAA) system of Airports providing commercial air service.

All JAA airports are included in the National Plan of Integrated Airport Systems (NPIAS). The NPIAS identifies the airports that are included in the national airport system, the roles they serve, and the Airport Improvement Program–eligible airport development needed over the next 5 years.

Expansion

JIA is currently working to expand the security checkpoint area, which will include equipment that is roughly twice as fast as the airport's existing screening technology.

In addition, the airport is preparing to construct a six-story, $100 million parking garage to increase parking capacity. Planned for more than 20 years, the new garage will be built adjacent to the current daily garage and include roughly 2,000 spaces and a floor for rental car parking. That project is expected to be completed in two years.

However, the airport's major and most anticipated part of the expansion plan is to develop Concourse B. Planned to break ground in 2023, Concourse B will add six additional gates to the terminal. The 165,000-square-foot terminal is estimated to cost $300 million and is slated for completion in 2025.

Herlong Recreational Airport

A home of Jacksonville's aviation enthusiasts since the 1960s, Herlong Recreational Airport (HEG) is Northeast Florida's primary location for light sport aircraft, skydiving, gliders, and other experimental aircraft. The airport was originally built during World War II to facilitate pilot training for the Navy and Air Force. After the war, the property was given to the city, and subsequently the JAA.

Cecil Airport

Cecil Airport is a public joint civil-military airport and spaceport located in Jacksonville, Florida. The airport is owned by the Jacksonville Aviation Authority and services military aircraft, corporate aircraft, general aviation, and air cargo. The Florida Army National Guard's primary Army Aviation Support Facility and the U.S. Coast Guard's Helicopter Interdiction Tactical Squadron (HITRON) are also located here, the former operating CH-47 Chinook, UH-60 Blackhawk, UH-72 Lakota and C-12 Huron aircraft, while the latter operates the MH-65C Dolphin helicopter.

Cecil Airport also houses the FSCJ (Florida State College Jacksonville) aviation course hangar and associated training aircraft. Sunrise Aviation, a flight training school and pilot supplies vendor is the flight training provider for FSCJ's aviation program. Facilities operated by major aerospace firms such as Logistic Services International (LSI), Boeing and Flightstar Aircraft Services are also located at Cecil, providing major training, maintenance, and overhaul services for a variety of U.S. military aircraft.

In 2010, Cecil Airport became the United States' eighth licensed commercial spaceport and the first in Florida authorized to fly space vehicles that take off and land horizontally.

Jacksonville Executive at Craig Airport

Formerly known as Craig Municipal Airport, Jacksonville Executive at Craig Airport (JAXEX) is a mid-sized general aviation facility. To better reflect its role as a corporate reliever for Jacksonville International, Craig Municipal Airport's name was changed to Jacksonville Executive at Craig Airport (JAXEX) in 2011.

JAXEX was originally built in the 1940s, one of six airports in the area developed for military training. In 1946, under the Federal Surplus Properties Act, the US Military gave the airport to the City of Jacksonville, which named the airport after fallen Navy Lt. Commander James Edwin Craig (1901-1941) who was killed in action during the Japanese attack on Pearl Harbor.

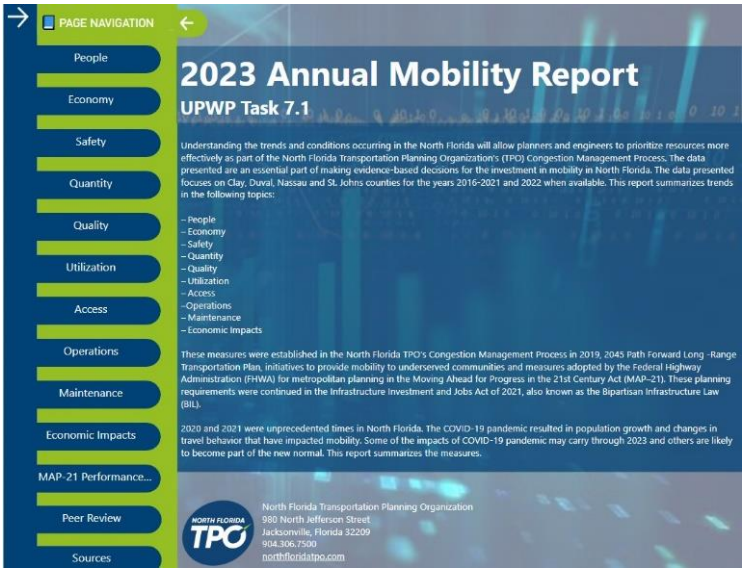
6.0 System Performance

Monitoring the system performance of the major transportation facilities in North Florida includes collection, analysis, and presenting to assess the efficiency, reliability, safety, and overall effectiveness of a transportation network. This reporting process is crucial for transportation authorities, policymakers, and the public to understand how well the system is functioning and to identify areas for improvement.

Additionally, the FHWA and FTA have established requirements for state departments of transportation and metropolitan planning organizations to implement a performance-based approach to planning and programming. Under this framework, the three Performance Measures (PM) rules and transit rules established various performance measures required to monitor the performance of safety (PM1), bridge and pavement (PM2), system performance (PM3), and transit asset management (TAM).

The North Florida TPO develops an annual Mobility Report that reports on the various performance measures and summarizes trends in the following topics:

- People
- Economy
- Safety
- Quantity
- Quality
- Utilization
- Access
- Operations
- Maintenance
- Economic Impacts



This report may be found on the TPO's website.

For this document, we will focus on Quantity, Quality, and Operations.

6.1 Quantity

The COVID-19 pandemic continued to impact travel across all modes in 2022. While the trends have not returned to pre-pandemic levels, more people moved by car in 2022 than in 2021 continuing to show a strong recovery from the impacts of the pandemic. While car travel is rising, transit ridership continues to decline as we continue to see people relying on rideshare services.

Vehicle-miles Traveled

Vehicle miles traveled is the most direct measure of the travel on roadways and represents the average annual daily traffic (AADT) multiplied by the roadway segment length. This measure is reported annually by the Florida Department of Transportation (FDOT). Figure 6-1 below presents vehicle miles traveled by year, by county on all public roadways. Figure 6-2 presents the vehicle miles traveled by year, by county on the state highway system.

Figure 6-1 Vehicle-Miles Traveled – All Roads

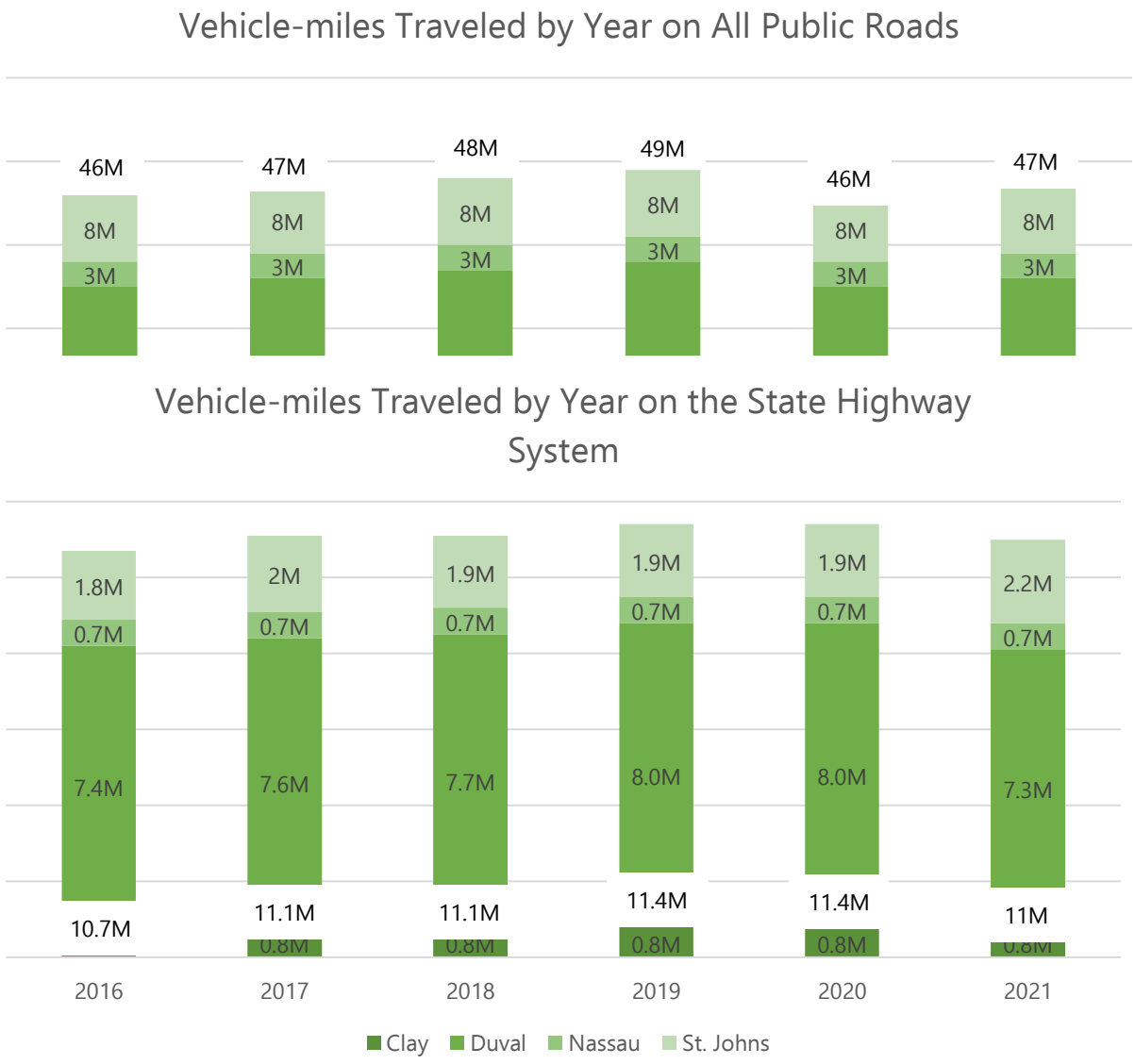


Figure 6-2 Vehicle-Miles Traveled

Transit Ridership

Transit ridership in the region continues to decline. Many trips are now being made via rideshare services such as Uber and Lyft. Figures 6-3 and 6-4 below present transit ridership in northeast Florida.

Figure 6-3: Transit Ridership

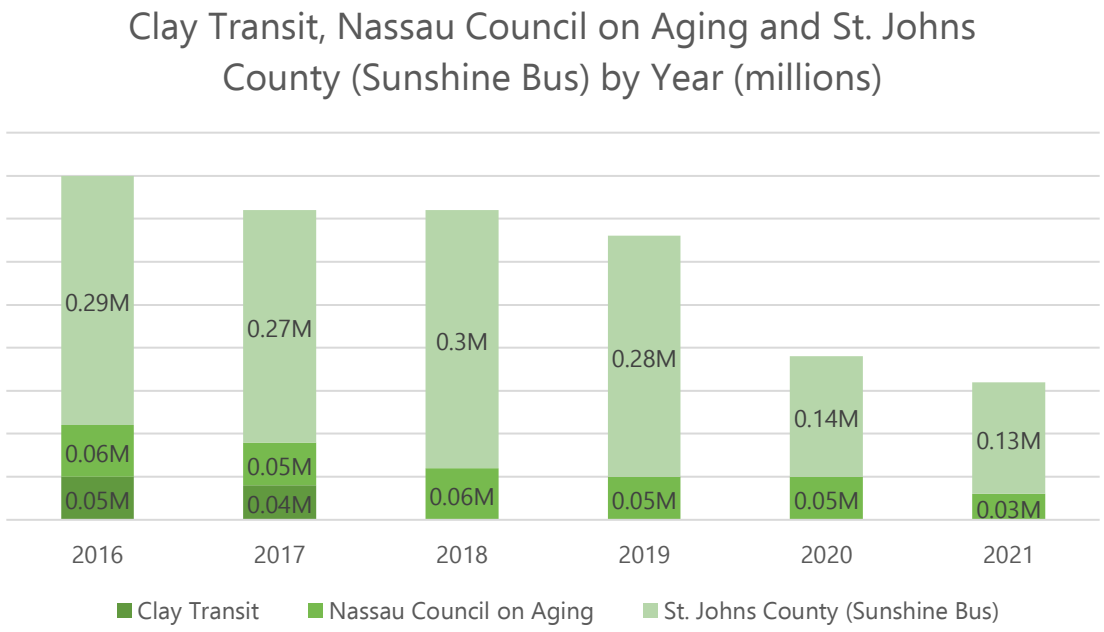
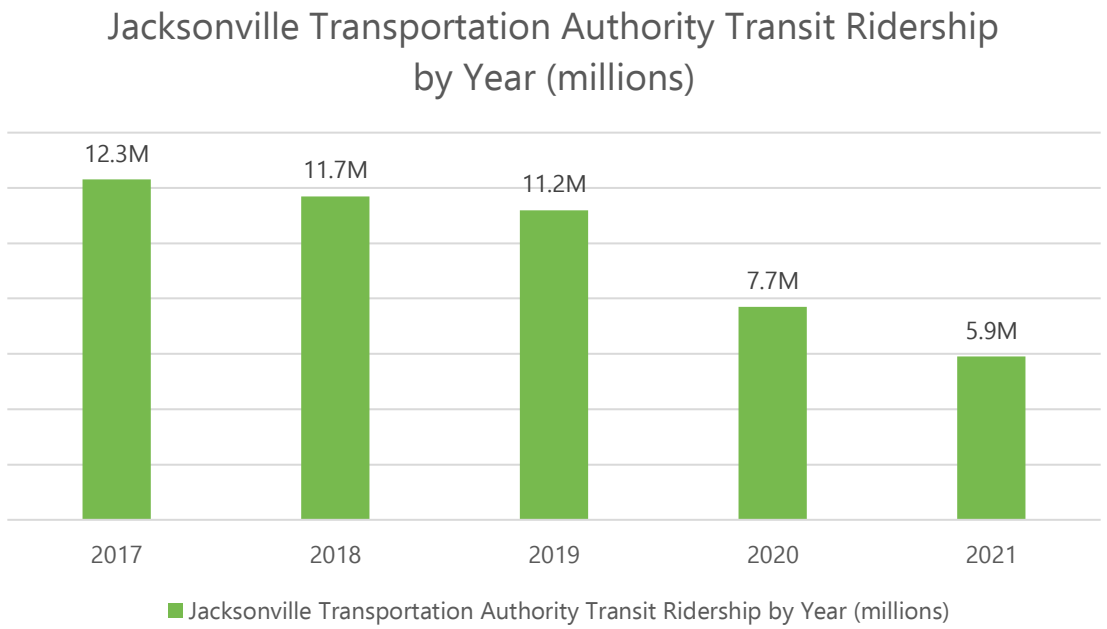


Figure 6-4: JTA Ridership



6.2 Quality

The quality of transportation facilities plays a crucial role in the overall efficiency, safety, and convenience of a transportation network. These facilities encompass various elements of infrastructure and services that support the movement of people and goods. The quality of transportation facilities can significantly impact a region's economic development, social connectivity, and environmental sustainability.

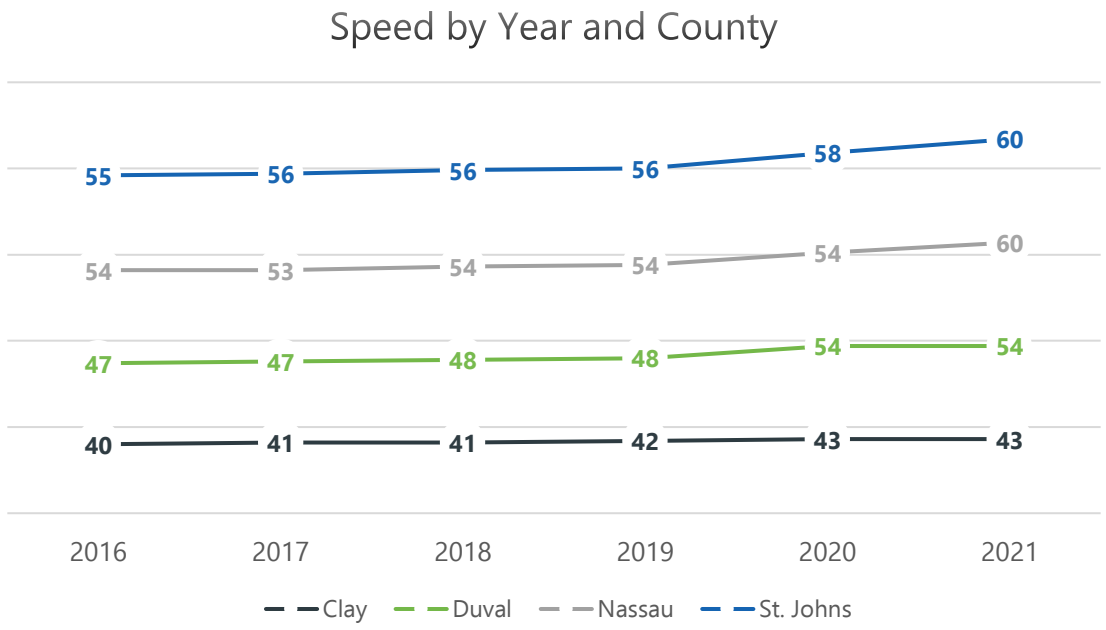
The COVID-19 pandemic impacted travel by reducing demand which in turn, increased the quality of the travel experience for those using all modes of travel. The number of vehicles on the roadways decreased which allowed for higher average speeds and excess capacity. As a result of lower demand, congestion levels resulted in decreased travel delays.

The figures below present some of the data sets that provide an overview of the quality of the region's transportation system.

Travel Speeds

The FDOT provides average peak hour travel speeds by roadway segment for the state highway system. This data has been summarized by county in the study area. The average speed is reported annually in miles per hour and is calculated by average peak hour travel speed. Average speeds increased from 2020 to 2021 as a result of lower demand (vehicle miles traveled).

Figure 6-5: Average Peak Hour Speeds by County



Delay

The FDOT provides daily delay by roadway segment for the state highway system in vehicle-hours. This data has been summarized by county and by roadway classification. The daily delay is reported annually in vehicle-hours per day. Consistent with the trends with speeds, delay increased on the state highway system but has not returned to pre-pandemic levels. The largest growth in delay occurred in St. Johns County.

Figure 6-6: Daily Delay by Year and County

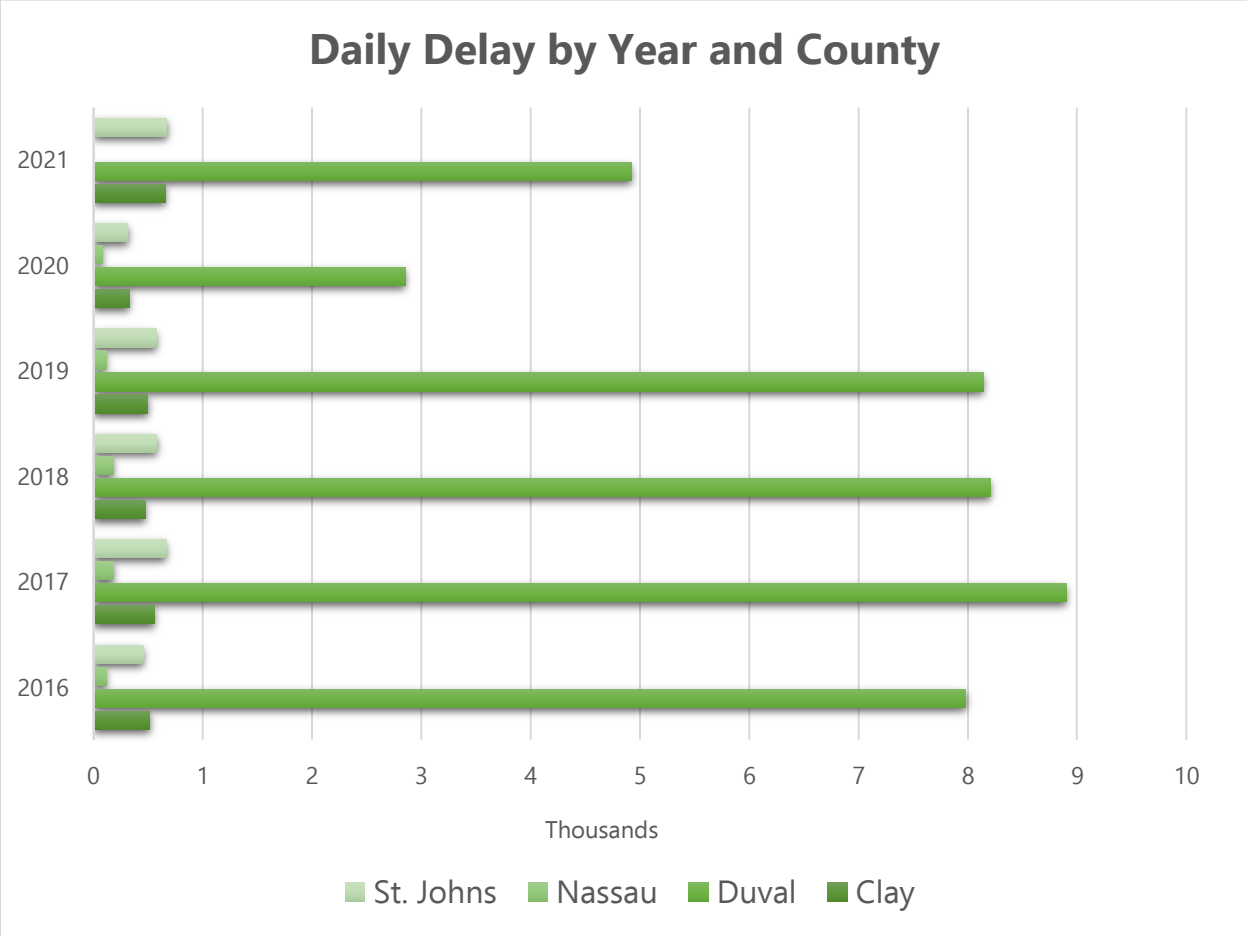
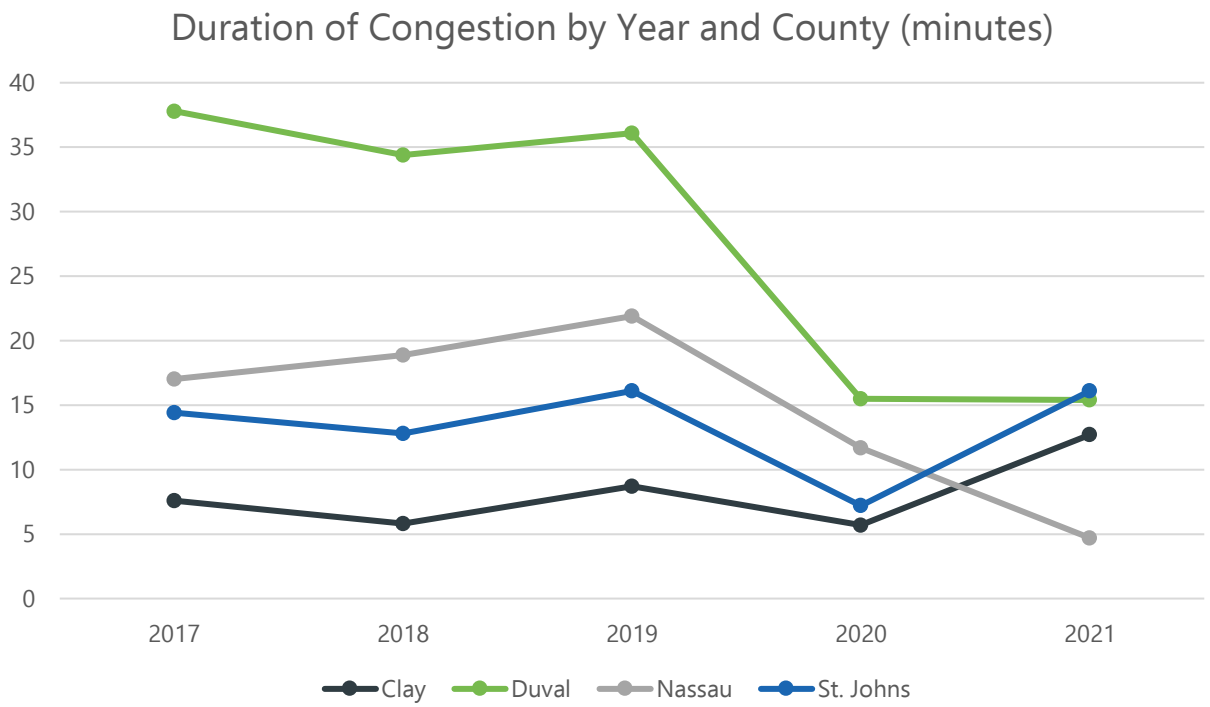


Figure 6-7: Duration of Congestion by Year and County (minutes)



Source: Florida Department of Transportation

Figure 6-8: Percent Miles Congested by Year – Clay County

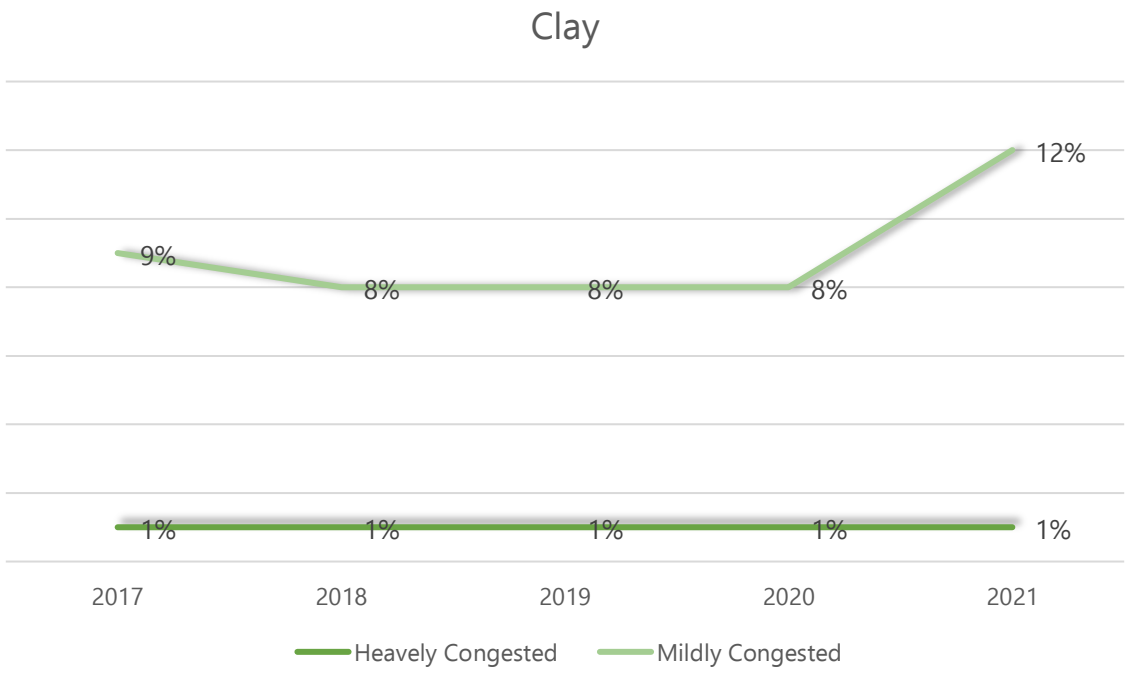
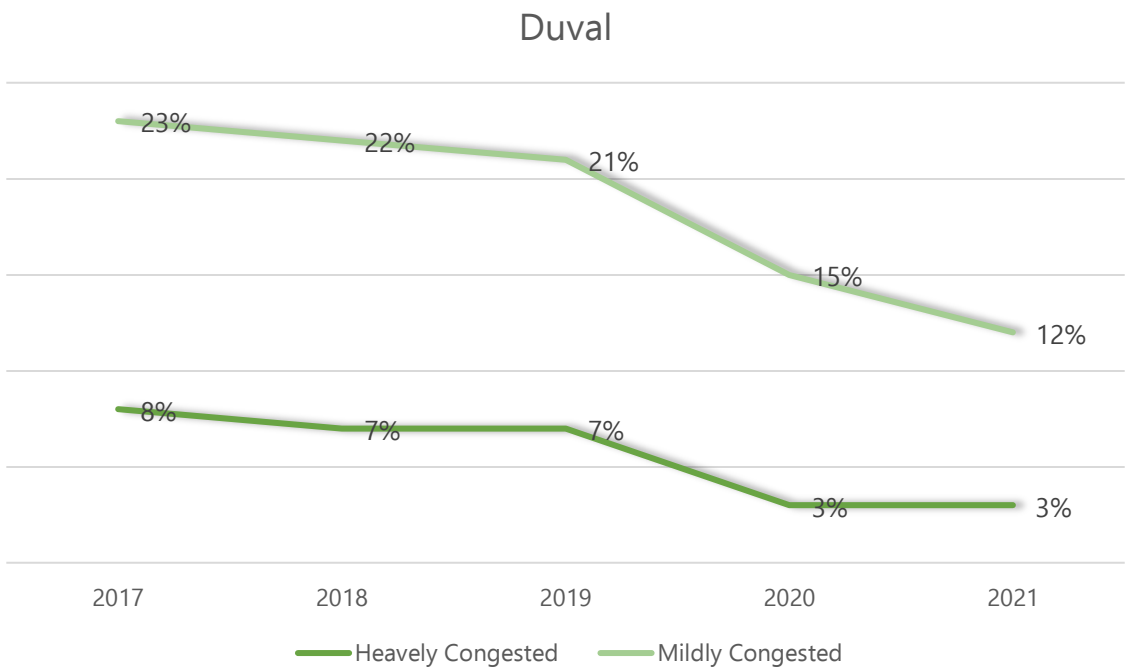
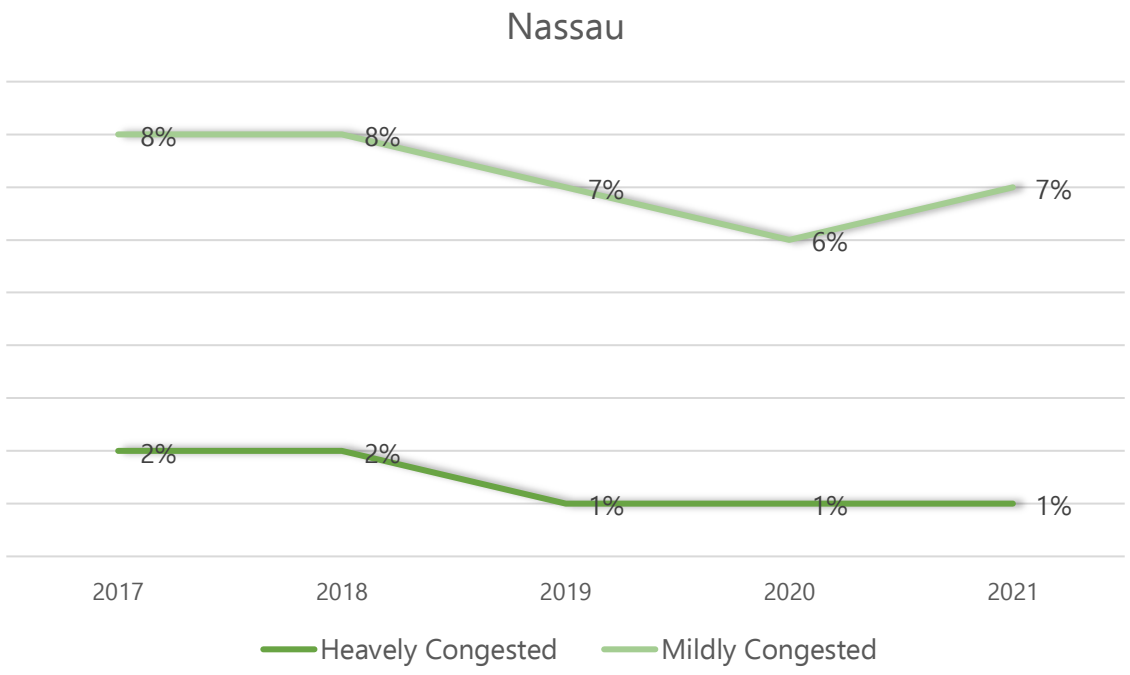


Figure 6-9: Percent Miles Congested by Year – Duval County



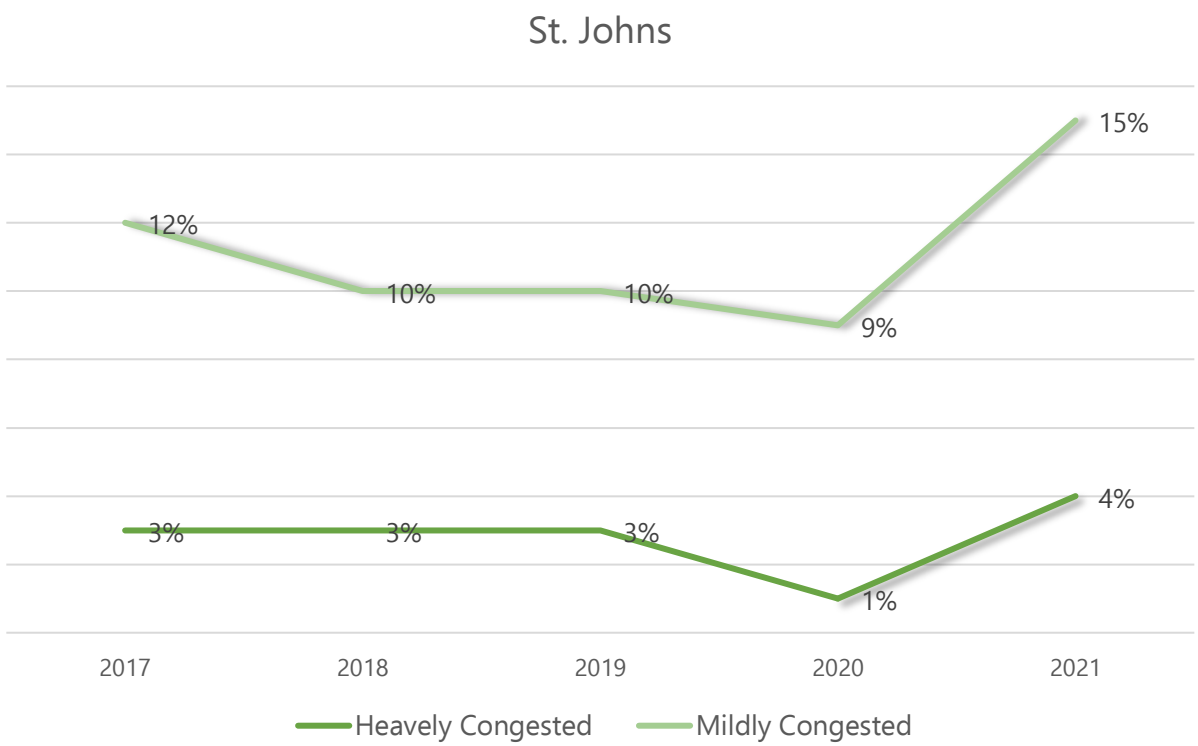
Source: Florida Department of Transportation

Figure 6-10: Percent Miles Congested by Year – Nassau County



Source: Florida Department of Transportation

Figure 6-11: Percent Miles Congested by Year – St. Johns County



Source: Florida Department of Transportation

Commuting to Work

Commuting time to work can vary widely depending on several factors, including your location, transportation mode, and distance between your home and workplace.

Table 6-1 Mean Travel Time to Work (2021, ACS)

MEAN TRAVEL TIME TO WORK	UNITED STATES	FLORIDA	REGION	CLAY	DUVAL	NASSAU	ST. JOHNS
MINUTES	25.6	27.1	**28.0**	31.2	23.2	32.2	25.3

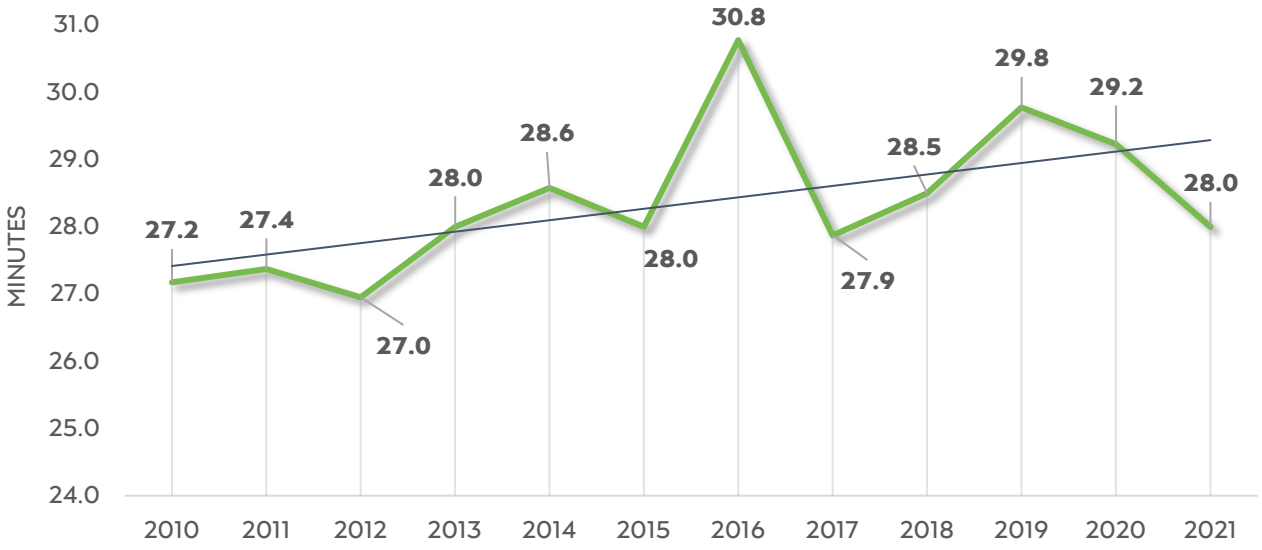
Regional Mean Travel Time to Work (2021)

28 minutes

Florida Mean Travel Time to Work (2021)

27 minutes

Figure 6-12 Regional Mean Travel Time to Work (minutes), 2010-2021



Mean travel time to work peaked in the region in 2016, with 30.8 minutes. Data is **currently trending down** as workers shift commuting behaviors since 2020.

Clay and Nassau counties consistently have the highest commute times within the region. Duval County has the shortest commute times, with 17% less than the regional average in 2021.

Table 6-2 Commuting to Work Mode (2021, ACS)

MODE	UNITED STATES	FLORIDA	REGION	CLAY	DUVAL	NASSAU*	ST. JOHNS
CAR, TRUCK, OR VAN -- drove alone	67.8%	70.5%	70.0%	74.1%	71.0%	-	64.9%
CAR, TRUCK, OR VAN -- carpooled	7.8%	8.5%	6.8%	5.4%	8.4%	-	6.6%
PUBLIC TRANSPORTATION	2.5%	1.0%	0.4%	0.0%	1.1%	-	0.1%
WALKED	2.2%	1.3%	1.1%	1.10%	1.1%	-	1.0%
OTHER MEANS	1.9%	2.1%	1.9%	1.90%	2.0%	-	1.9%
WORKED FROM HOME	17.9%	16.6%	19.8%	17.5%	16.5%	-	25.5%

** Data not available for Nassau County*

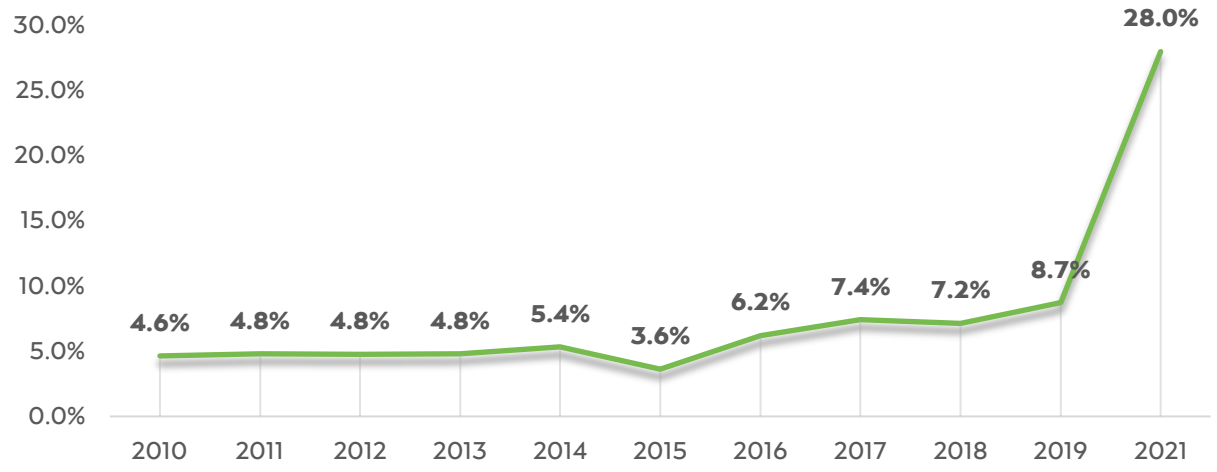
Worked from Home (Region, 2021)

19.8%

Worked from Home (Florida, 2021)

16.6%

Figure 6-13 Regional Work from Home (%), 2010 - 2021



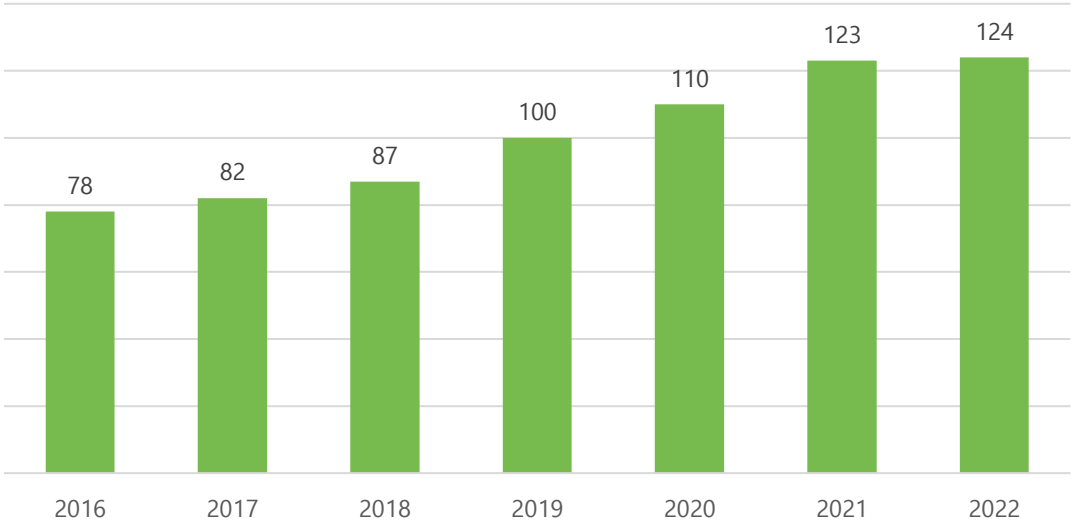
Working from home regionally **increased 89%** between **2010 and 2019**.

Working from home **increased by over 220%** between **2019 and 2021**.

Operations

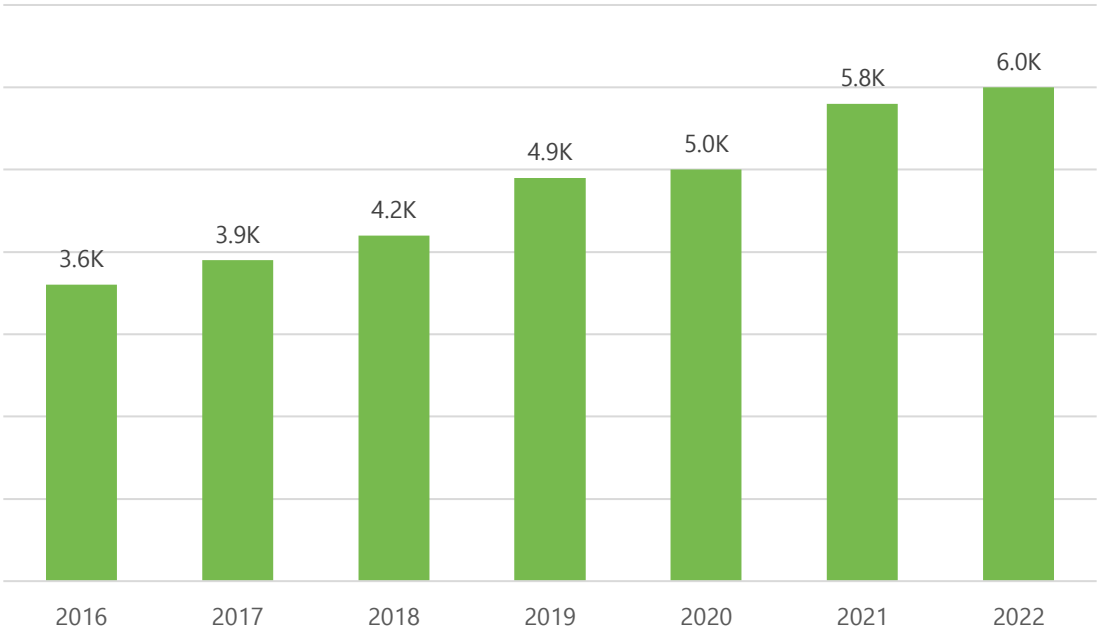
For this measure, the number of lane closures or incidents and other events, such as abandoned vehicles, debris in the roadway, road work, or crashes are tracked.

Figure 6-14: Incidents per Million Vehicle-miles Traveled



Source: Florida Department of Transportation

Figure 6-15: Reported Events by Year



Source: Florida Department of Transportation

7.0 Summary

Understanding the trends and conditions occurring in North Florida will allow planners and engineers to prioritize resources more effectively as part of the North Florida TPO's Planning Process. The data presented in the report are an essential part of making evidence-based decisions to invest in mobility in North Florida.