

**Table 3.1**  
**Turnpike Service Area County Population**  
**1980-2023**

County	Turnpike Interchanges and Facilities	Population (000)						Average Annual Growth ('80-'23)
		1980	1990	2000	2010	2020	2023	
Miami-Dade	Turnpike Mainline - SR 821 (0 through 35), 0X, 2X	1,626	1,937	2,253	2,496	2,702	2,769	1.2%
Broward	Turnpike Mainline - SR 821 (39, 43, 47), 49, 53, 54, 58, 62, 66, 67, 69, 71, Sawgrass Expressway	1,018	1,255	1,623	1,748	1,944	1,974	1.6
Palm Beach	75, 81, 86, 93, 97, 99, 107, 109, 116	577	864	1,131	1,320	1,492	1,533	2.3
Martin	133	64	101	127	146	158	163	2.2
St. Lucie	138, 142, 152	87	150	193	278	329	369	3.4
Osceola	193, 240, 242, 244, 249, SCE, Western Beltway, Part C	49	108	172	269	389	439	5.2
Orange	251, 254, 259, 265, 267, 272, Beachline West/East Expressways, SCE, Western Beltway, Part C	471	677	896	1,146	1,430	1,493	2.7
Lake	278, 285, 289, 296	105	152	211	297	384	415	3.2
Sumter	304, 309	24	32	53	93	130	155	4.4
Seminole	Seminole Expressway	180	288	365	423	471	487	2.3
Polk	Polk Parkway	322	405	484	602	725	798	2.1
Hillsborough	Veterans Expressway, Suncoast Parkway, I-4 Connector	647	834	999	1,229	1,460	1,542	2.0
Pasco	Suncoast Parkway	194	281	345	465	562	611	2.7
Hernando	Suncoast Parkway	45	101	131	173	195	204	3.6
Citrus	Suncoast Parkway	55	94	118	141	154	162	2.5
Okeechobee	Turnpike Mainline - SR 91 (MP 88 - MP 236)	20	30	36	40	40	40	1.6
Indian River	Turnpike Mainline - SR 91 (MP 88 - MP 236)	60	90	113	138	160	168	2.4
Brevard	Beachline East Expressway	273	399	476	543	607	641	2.0
Clay	First Coast Expressway	67	106	141	191	218	231	2.9
Duval	First Coast Expressway	571	673	779	866	996	1,051	1.4
Santa Rosa	Garcon Point Bridge	56	82	118	145	172	203	3.0
Turnpike Service Area (21 Counties)		6,511	8,659	10,764	12,755	14,734	15,448	2.0
Total State (67 Counties)		9,747	12,938	15,982	18,801	21,538	22,635	2.0
Percent (21 of 67 Counties)		66.2%	66.3%	66.6%	67.0%	67.5%	68.2%	

Source: U.S. Bureau of the Census and University of Florida, Bureau of Economic and Business Research.

**Table 3.2**  
**State and County Population**  
**1990-2035 Forecast**

Year	Turnpike Service Area (21 Counties)		Total State (67 Counties)		Percent (21 of 67 Counties)
	Population (000)	Average Annual Growth*	Population (000)	Average Annual Growth*	
1990 Census	8,659	—	12,938	—	66.9%
2000 Census	10,764	2.2%	15,982	2.1%	67.4
2010 Census	12,755	1.9	18,801	1.9	67.8
2020 Census	14,734	1.8	21,538	1.7	68.4
2025 Forecast	15,898	1.8	23,292	1.7	68.3
2030 Forecast	16,872	1.8	24,699	1.6	68.3
2035 Forecast	17,636	1.7	25,815	1.5	68.3

Source: U.S. Bureau of the Census and University of Florida, Bureau of Economic and Business Research.

Forecast: BEBR Bulletin 198, January 2024.

\* Growth is compounded annually based on the 1990 Census data.

The average annual growth in the Turnpike Service Area counties has exceeded the overall state average growth in the last four censuses. This higher growth is forecasted to continue through 2035.

**Table 3.3  
Comparison of Growth Indices**

Index	Number (000)								Average Annual Growth (1980-2023)
	1980	1990	2000	2010	2020	2021	2022	2023	
Total State Population	9,747	12,938	15,982	18,801	21,538	21,899	22,276	22,635	2.0%
Turnpike Service Area Population	6,511	8,659	10,764	12,755	14,734	14,788	15,025	15,448	2.0
Fuel Consumption (Highway Use)	5,246,579	7,031,708	8,906,286	9,611,976	10,255,101	11,097,391	11,446,162	11,682,885	1.9
Employment	4,026	6,061	7,569	8,141	9,328	9,835	10,447	10,668	2.3
Number of Tourists	20,046	40,970	72,800	82,300	79,338	122,023	137,401	140,624	4.6
Turnpike Traffic (Transactions)	55,463	121,378	379,132	639,426	860,569	861,062	1,138,036	1,284,965	7.6

Source: U.S. Bureau of the Census and University of Florida, Bureau of Economic and Business Research, Florida Commission on Tourism, Visit Florida, Florida Department of Transportation and Florida Research and Economic Database.

This table displays a comparison of major indices with the growth in Turnpike traffic for the historical 1980-2023 period. Turnpike traffic has been increasing at a rate exceeding the other indices.

**Table 3.4**  
**Comparison of Housing Units, Households, and Home Ownership Rate**  
**Among the Five Most Populous States**

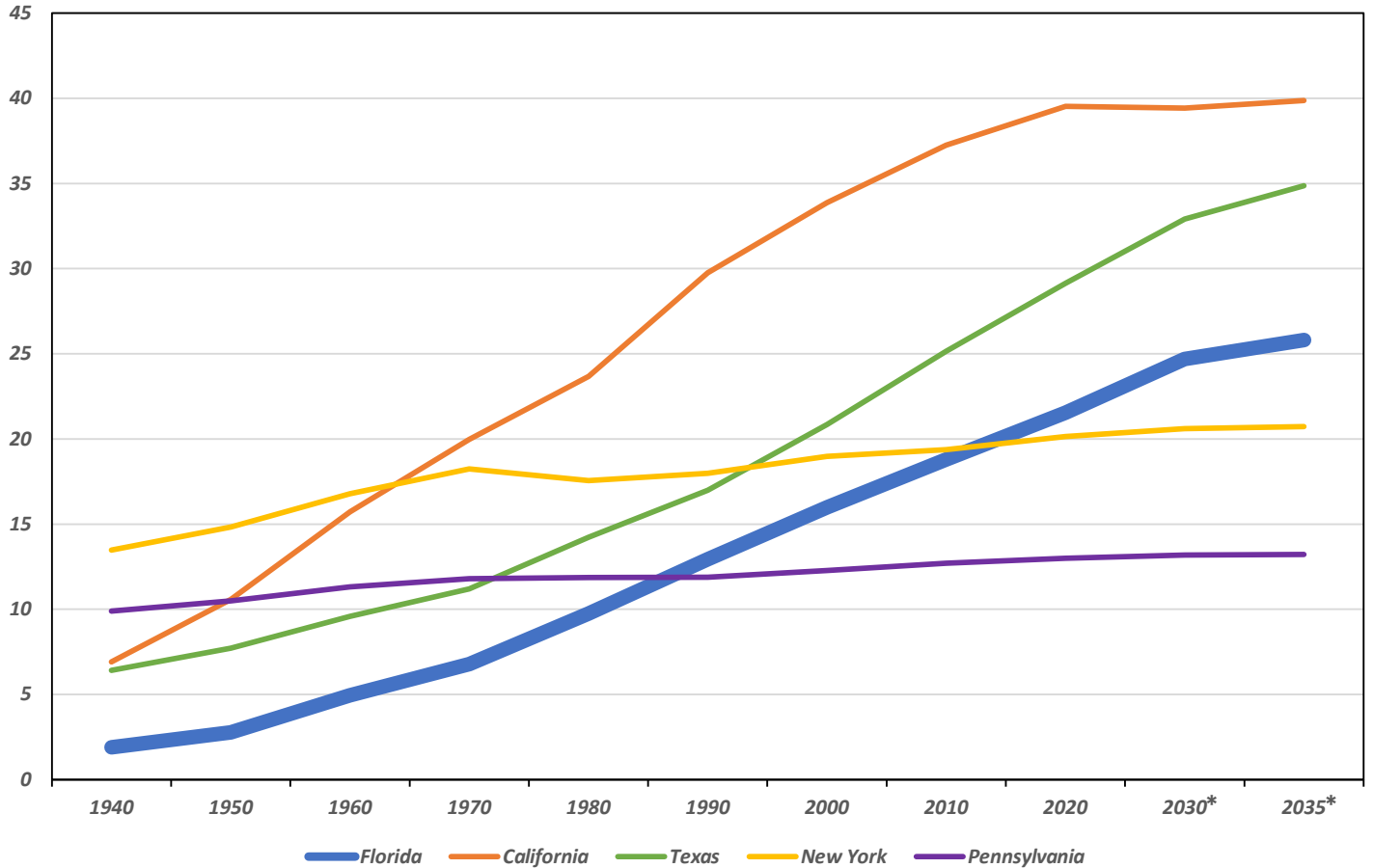
	Total Housing Units (Millions)	Total Housing Households (Millions)	Home Ownership Rate* (Percent)
California	14.4	13.3	55.6%
Texas	11.7	10.5	62.4
Florida	9.9	8.4	66.9
New York	8.5	7.6	54.3
Pennsylvania	5.8	5.2	69.2

Source: U.S. Census Bureau, American Community Survey 2022.

\* Reflects percent of occupied housing units that are owner-occupied.

As a result of the population growth, the number of households in Florida increased from about 7.0 million in 2010 to 8.4 million in 2022. Among the most populous states, Florida ranks near the top with respect to home ownership rates, and third in the number of housing units and the number of households.

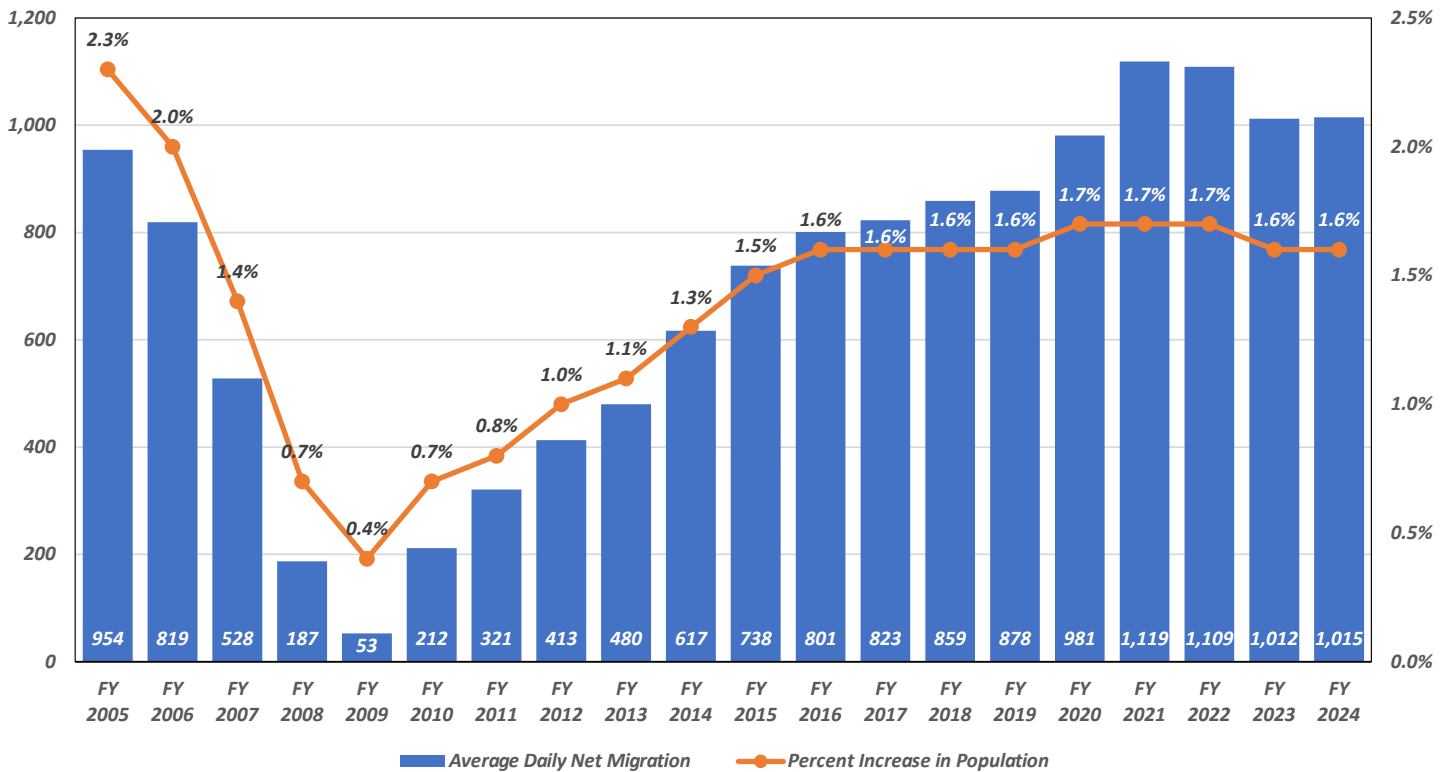
**Graph 3.1**  
**Comparative Population Growth in Five Most Populous States**  
**(In Millions)**



Source: U.S. Bureau of the Census and University of Florida, Bureau of Economic and Business Research and individual state websites.  
 Florida Forecast: BEBR Bulletin 198, January 2024.  
 \* Estimate

Between 1940 and 1980, Florida was the fifth most populous state. The accelerated growth rate of the state between 1990 and 2020 has pushed Florida's population higher than both New York and Pennsylvania. In 2030, Florida is forecasted to continue to have the third highest population, behind California and Texas.

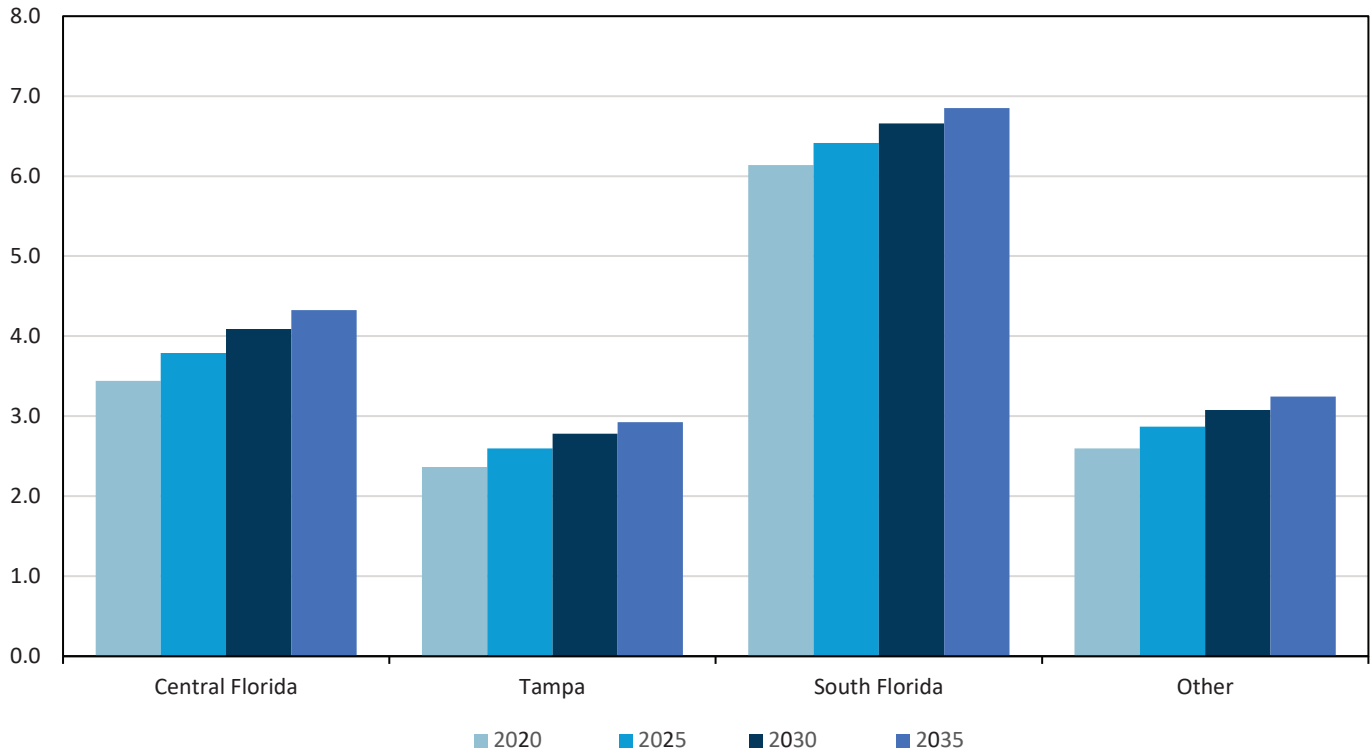
**Graph 3.2**  
**Florida Population Trend**



Source: Florida Demographic Estimating Conference July 9, 2024.

Florida's population is gradually increasing due in large part to a strengthening economy. As the graph shows, Florida's annual population growth reached 1.6 percent in FY 2016 and remained mostly at that level through FY 2022, albeit a significant decline from the levels seen prior to the Great Recession. Correspondingly, the average daily net migration (excluding deaths and births), which peaked at nearly a thousand residents in FY 2004, has gradually rebounded to return to similar levels from FY 2021 through FY 2024.

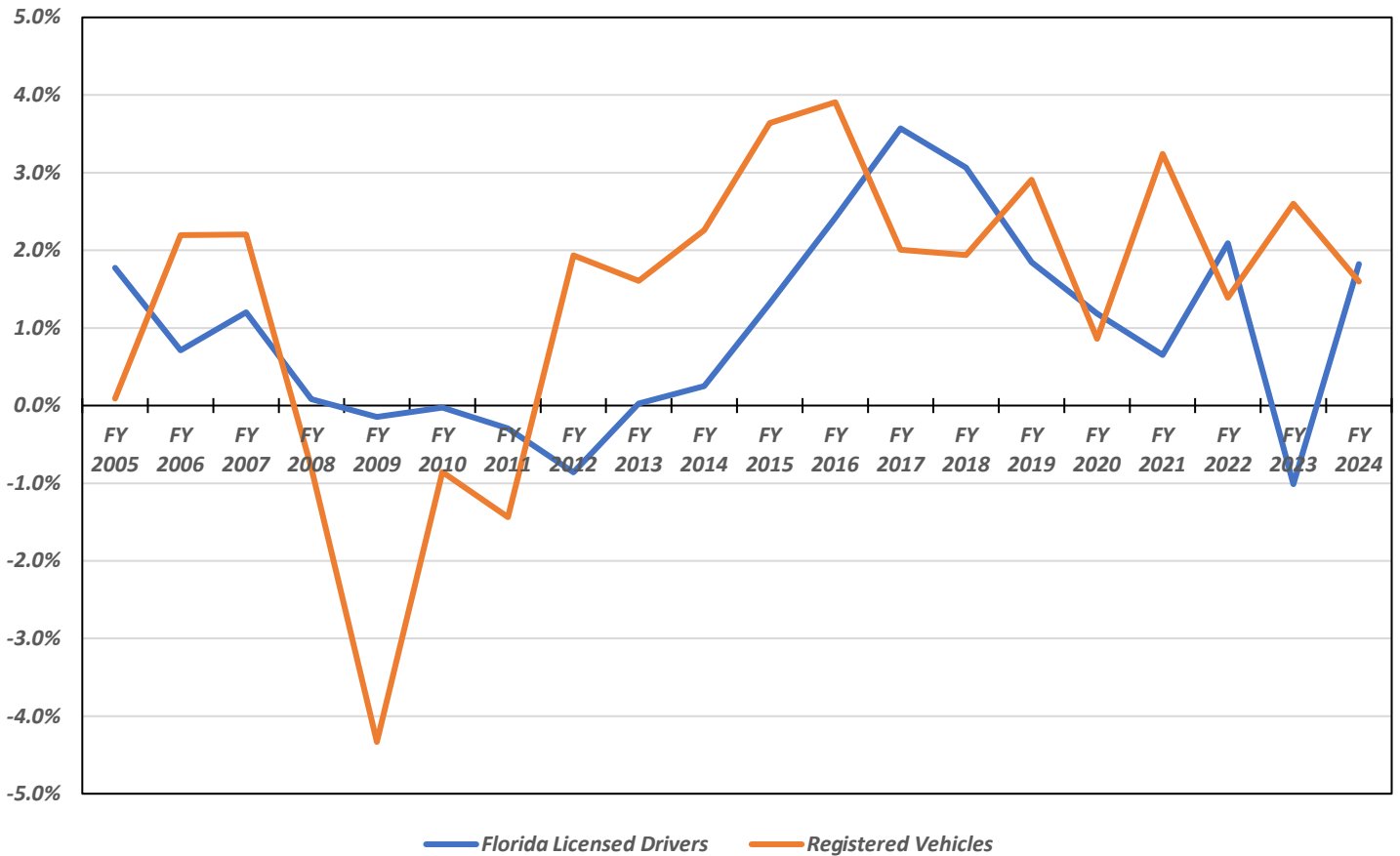
**Graph 3.3**  
**Current and Future Population Estimates of Regions Served By Turnpike**  
**(In Millions)**



Source: U.S. Bureau of the Census and University of Florida, Bureau of Economic and Business Research.  
 Forecast: BEBR Bulletin 198, January 2024.

The state's population is expected to exceed 25 million in 2035. Furthermore, as the graph depicts, all the population centers that the Turnpike serves are expected to grow. The anticipated increase in population between 2035 and 2020 for the Central Florida region is 865 thousand, the Other region is 802 thousand, the South Florida region is 669 thousand, and the Tampa region is 587 thousand.

**Graph 3.4**  
**Year-Over-Year Percent Change: Florida Licensed Drivers and Registered Vehicles**

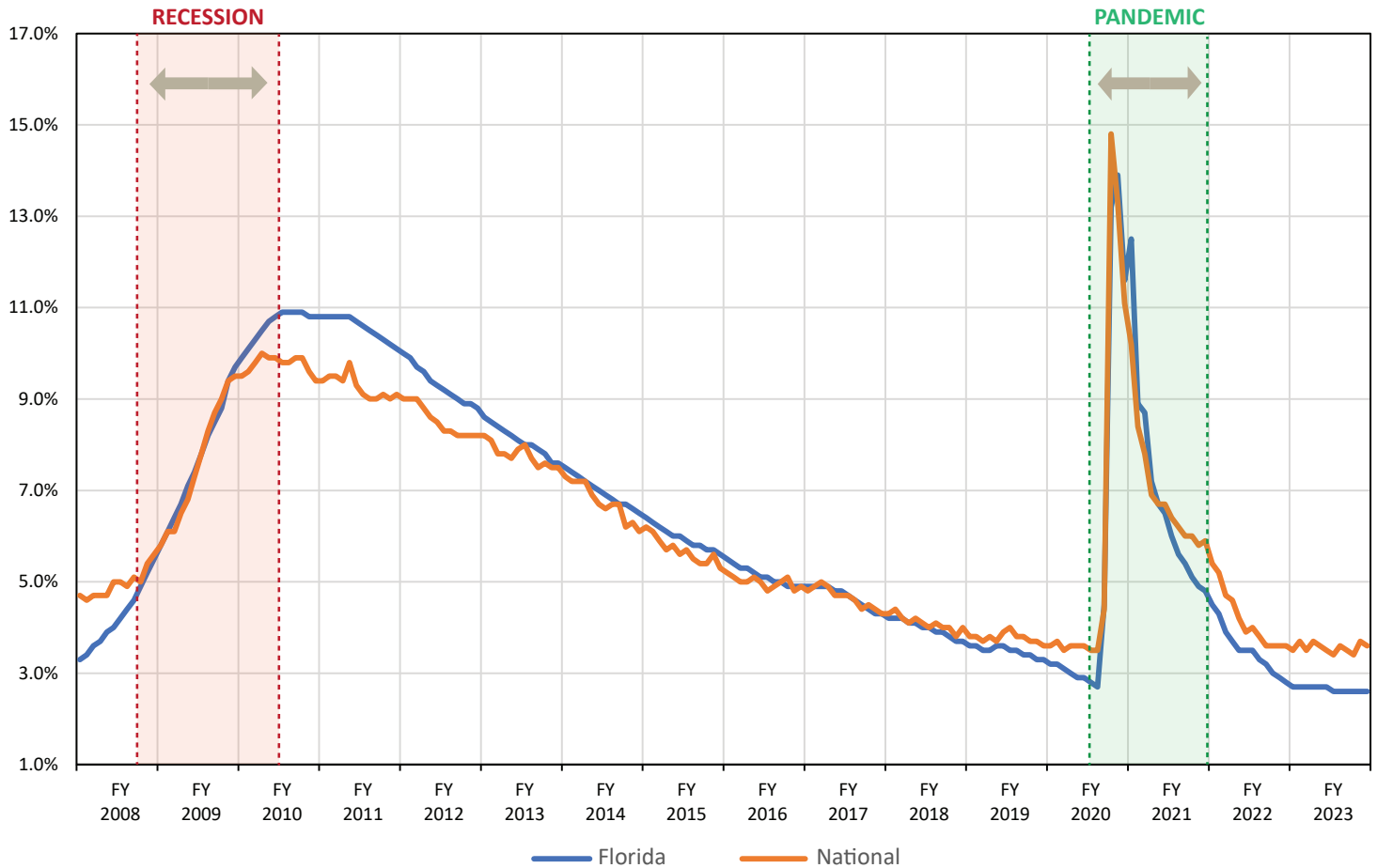


Source: Florida Department of Highway Safety and Motor Vehicles.

Historically, population growth has had a direct impact on the number of driver’s licenses and vehicles registered in the state. After declines during the Great Recession due to a slow down in population, year-over-year growth rates of Florida licensed drivers increased through FY 2017. Apart from FY 2023 which experienced a negative one percent change, licensed drivers ranged from approximately one percent to two percent growth per year between FY 2019 and FY 2024. In this same span, registered vehicles have grown between approximately one percent and three percent per year.



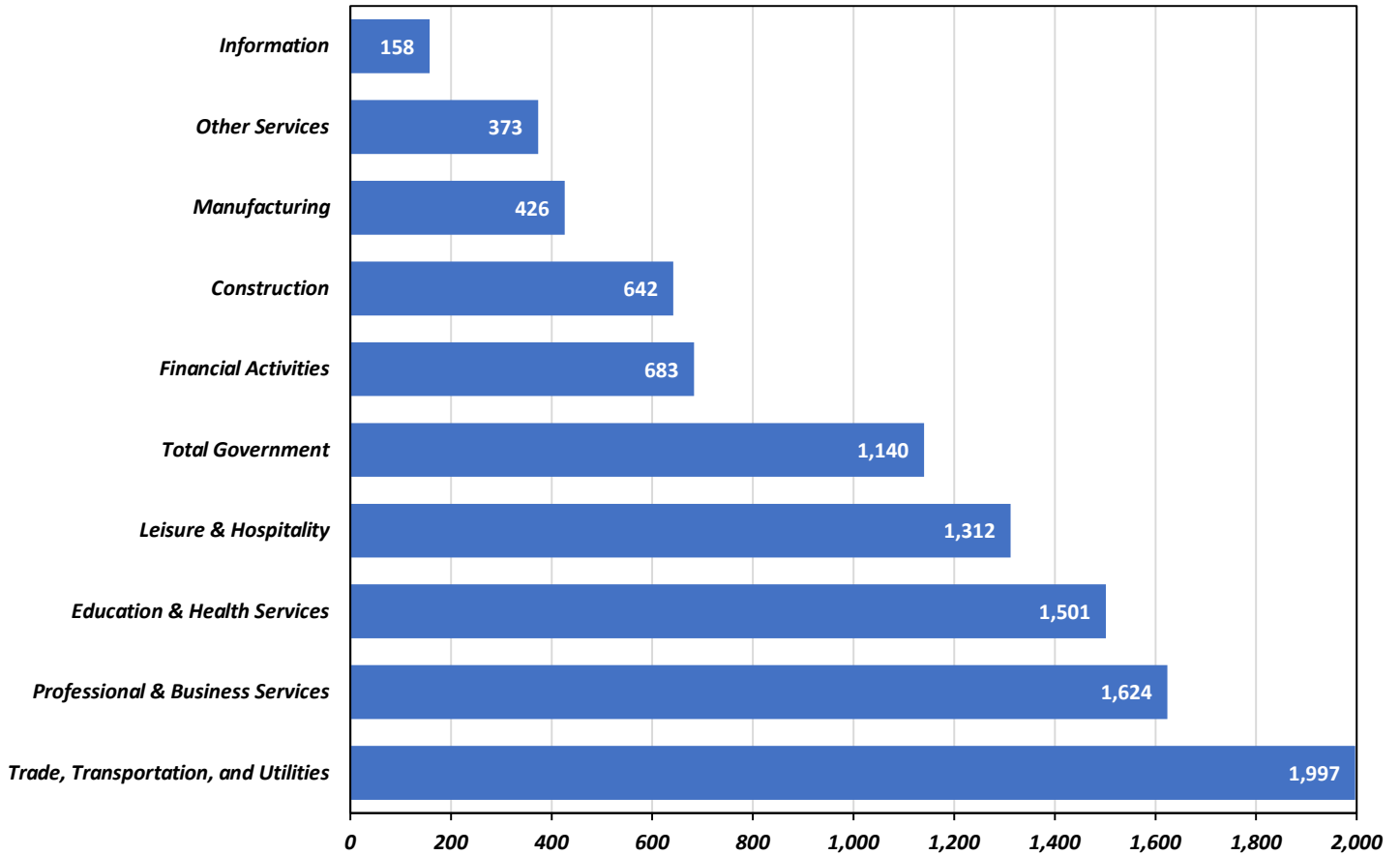
**Graph 3.5  
Unemployment Rate**



Source: U.S. Bureau of Labor Statistics.

This graph displays the change in the unemployment rate in Florida, along with the national rate since the beginning of FY 2008. After peaking at 10.9 percent in January 2010, Florida’s unemployment rate gradually declined to 2.7% in February 2020, lower than the national average of 3.5 percent. Due to the national economic downturn spanning 2020 to 2022, unemployment rose dramatically in Florida peaking at 13.9 percent in May 2020. Since the peak in 2020, the Florida unemployment rate continually decreased to a low of 2.7 percent in April 2023. In FY 2024 Florida’s unemployment rate has increased slightly to 3.3 percent compared to the national rate of 4.1 percent.

**Graph 3.6**  
**2024 Non-Agricultural Employment in Florida**  
**(In Thousands)**

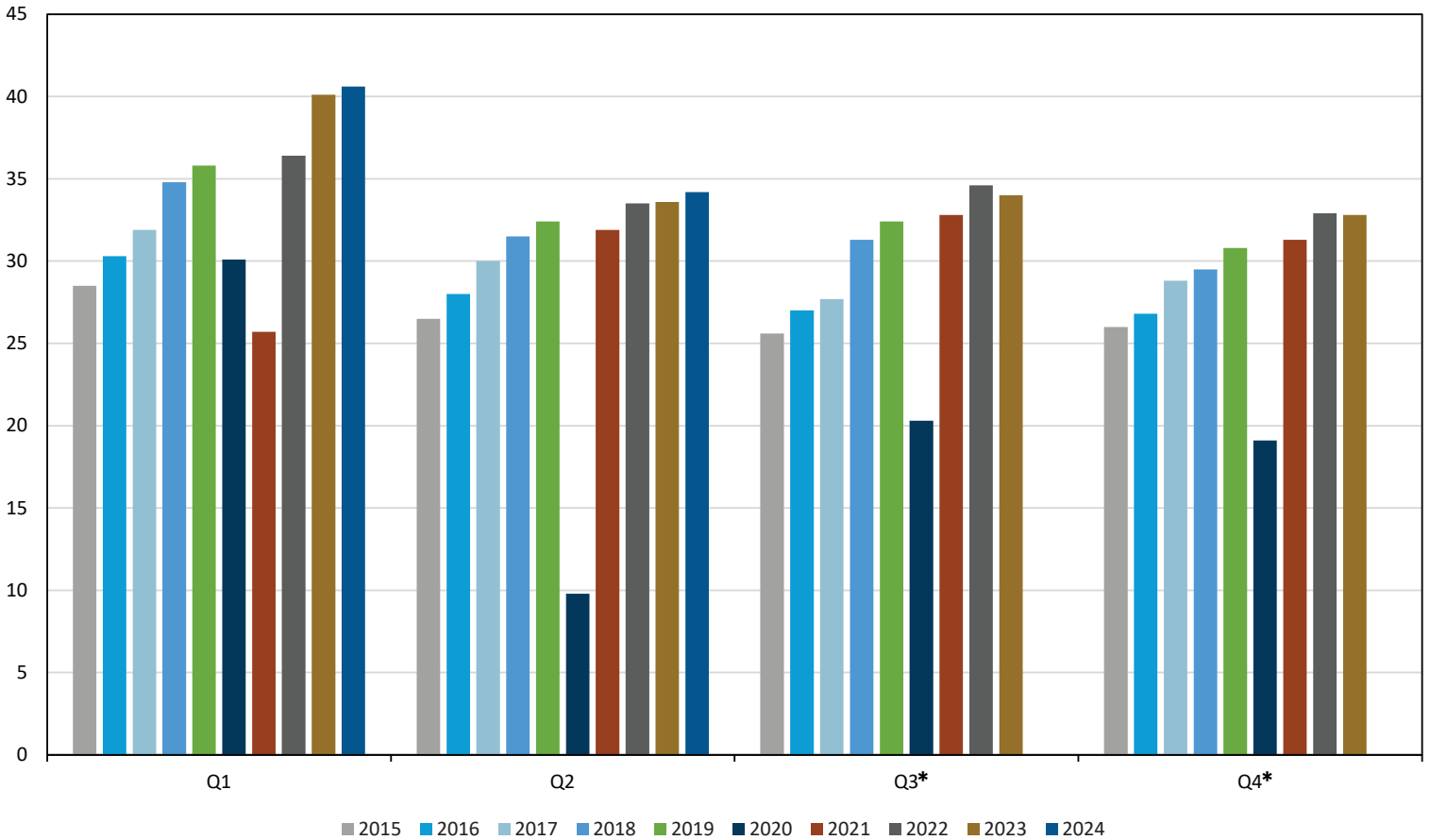


Source: U.S. Bureau of Labor Statistics.

Florida has a diverse industry base, which to some extent, mitigates the impact from economic downturns in certain industry sectors. It has a vibrant leisure and hospitality industry, and professional and business services industry, complemented by international trade.

The graph above presents the Non-Agricultural Employment in the state by the North American Industry Classification System (NAICS). In FY 2024, the trade, transportation and utilities industries employed approximately 2.0 million of the workforce and 20 percent of the total employment; followed by professional and business services; education and health services; and leisure and hospitality. All sectors experienced year-over-year increases.

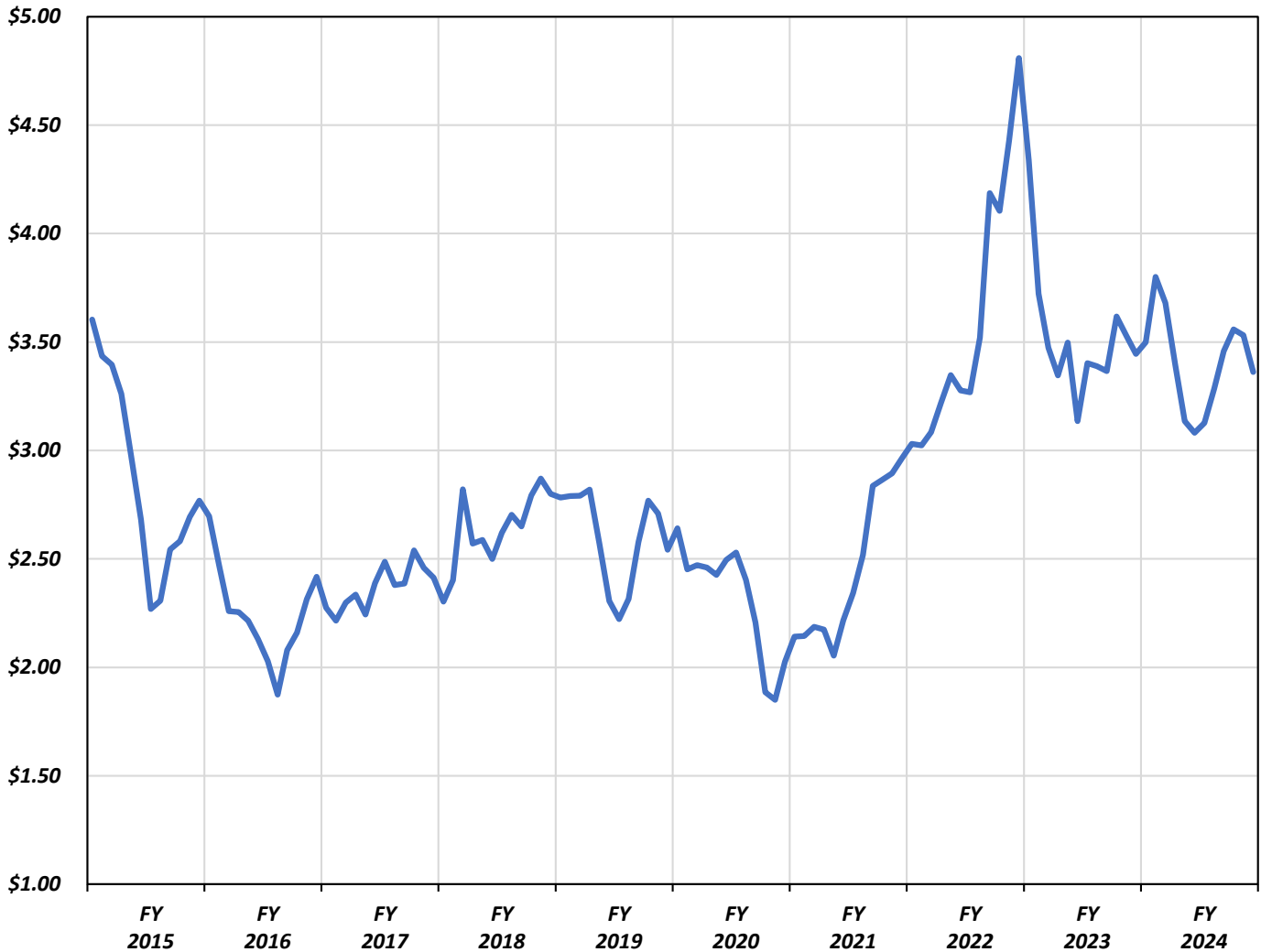
**Graph 3.7  
Florida Tourists  
(in Millions)**



Source: visitflorida.org  
 \* 2024 Q3 and Q4 data not yet available.

Tourism is a vital component of Florida’s economy. This graph shows the number of Florida visitors by quarter over the past ten calendar years. All quarters show an increasing trend except for 2020, reflecting the economic downturn, and the third and fourth quarters of 2023. The 2020 economic downturn recovery started in the second quarter of 2021 and has continued to increase year-over-year through the second quarter of 2023. The 2023 third quarter decreased by 1.6 percent, year-over-year, while the fourth quarter decreased by 0.3 percent. The number of visitors increased over the prior in the first and second quarters of 2024.

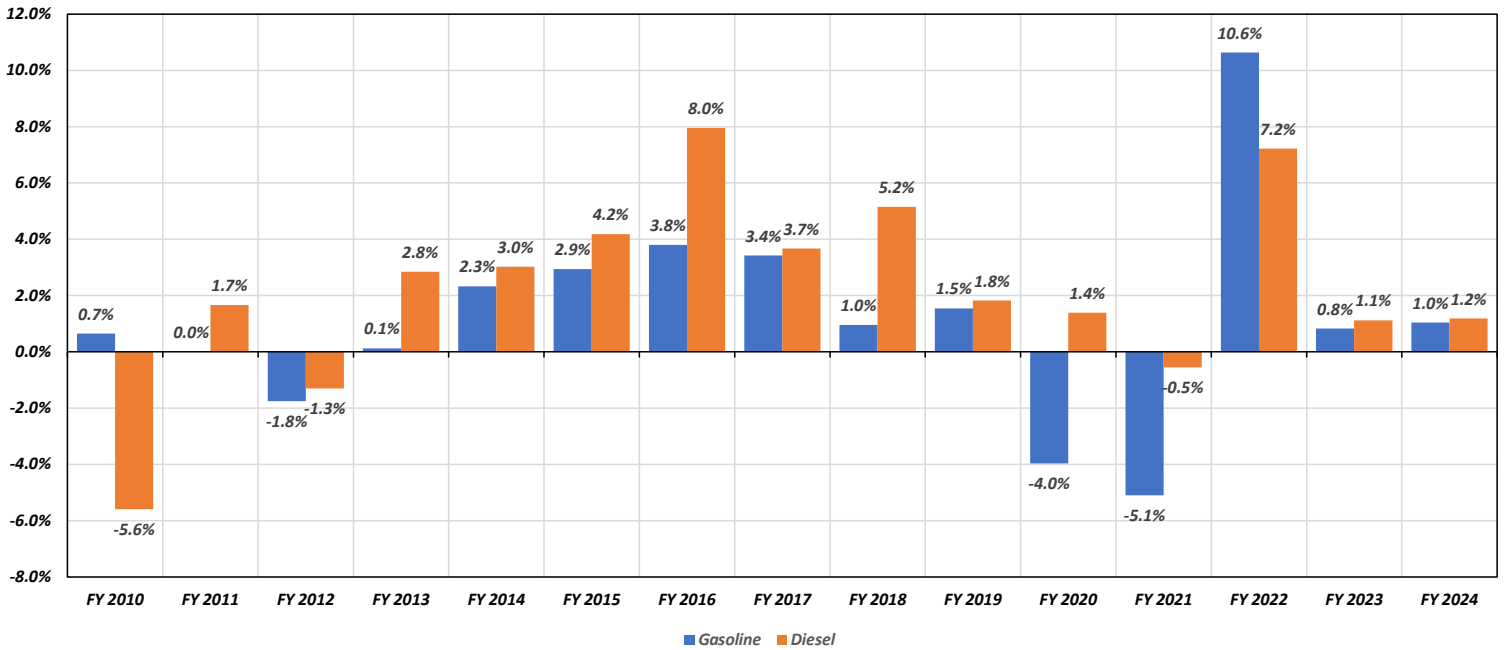
**Graph 3.8**  
**Florida Gasoline Prices (Average of All Grades)**



Source: Energy Information Administration, U.S. Department of Energy.

This graph portrays the historical trend of gas prices in Florida (average of all grades) over the past ten years. Historically, prices per gallon fluctuated between \$2 and \$4. Gas prices grew consistently from 2021 to a peak of \$4.81 in June of FY 2022, with a sharp decrease to \$3.14 in FY 2023. During FY 2024 gas prices have oscillated between \$3.08 and \$3.80.

**Graph 3.9**  
**Year-Over-Year Percent Change:**  
**Highway Fuel Consumption in Florida**



Source: Florida Department of Transportation.

The decline in fuel consumption, particularly diesel in FY 2009 and FY 2010 reflects the impact of the economic recession at that time. The consumption rate rebounded starting in FY 2013 and continued through FY2019. Recently, the increased deployment of more fuel-efficient vehicles has contributed to the diminished growth in the highway fuel consumption rate in the state. The decline in gasoline consumption in FY 2020 and FY 2021 is largely attributed to the decrease in travel resulting from the economic downturn. The consumption rebound in FY 2022 reflects the increase in traffic following the State's recovery. The trends in FY 2023 and FY 2024 convey a modest growth rate for both gasoline and Diesel consumption in comparison to the high growth rates in FY 2022.

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