

ALLIANCE
FOR REGIONAL
TRANSPORTATION

ORLANDO 2030 TRANSPORTATION

“With our growth comes great responsibility to make critical decisions today that ensure we can finance and provide the right infrastructure for tomorrow.”



As the region's economic and community development organization, the Orlando Economic Partnership is focused on finding solutions that advance broad-based prosperity™. This means improving the lives of all residents and planning for a future where all can thrive. It's a complicated endeavor that includes tackling difficult issues and leveraging the community's collective impact to solve. One of those issues is finding smart transportation solutions that make sense for our residents, companies and communities.

In the past decade, the Orlando region has struggled to keep up with its phenomenal growth, despite investing more than \$10 billion in several high-profile, high-impact infrastructure assets. The level of coordination and cooperation required on these massive projects serves as a testament to the region's exceptional ability to collaborate. Sustaining that level of collaboration will only intensify as we consider the future.

By 2030, a mere 10 years away, our region is projected to reach a population of 5.2 million people, 800,000 more than today. More than 600,000 potential additional personal vehicles will be traveling on our roads. In 2030, Orlando will have more than 57 million people flying in and out of our airports, close to the number of people that fly through New York City's JFK today.

Disrupters to our economy like autonomous vehicles, advanced robotics, and the Internet of Things are quickly changing how we do business, how we interact, and how we travel. The way we respond to those disrupters is the challenge we face. With our growth comes great responsibility to make critical decisions today that ensure we can finance and provide the right infrastructure for tomorrow. From coast to coast in Central Florida, billions of dollars will be needed to expand what we have and create new modes and means of travel. If we don't act now, the consequences of our failure will be felt every day. It will translate into reduced productivity and an economy overwhelmed by its accelerated growth.

We must re-imagine and re-invent transportation in Central Florida to meet the challenges and opportunities of the future. Private, public, and civic partners must act now to create and enhance an integrated, multimodal, regional transportation system that meets the needs of residents, visitors, and businesses throughout the seven-county region and provides the foundation for future quality of life and economic prosperity.

And finally, this report is possible because of the hard work of many individuals who have committed their time and talent to addressing this important issue. I'd especially like to thank Tracey Stockwell who has served as the Chair of the Partnership's Alliance for Regional Transportation (ART) and led the corporate workgroup and the executive committee through the development of this report.

By collectively supporting initiatives that propel our progress we are preparing our region and ensuring a more prosperous future for generations to come. This will require bold decisions and actions. The time is now.

Onward,



Tim Giuliani
President & CEO, Orlando Economic Partnership

EXECUTIVE SUMMARY

The Orlando region is one of the nation's most dynamic metropolitan areas, with a diverse, fast growing economy and one of the world's largest visitor markets. The region's population exploded from 400,000 residents in 1950 to 4.4 million in 2018, spread across 85 cities in seven Central Florida counties.

From highway to rail corridors, airports to spaceports, Orlando's extensive transportation network has long provided a foundation for economic growth. Rising congestion, heightened safety concerns, and increasing costs to households and businesses threaten the region's future. Delay and congestion costs are accelerating at an alarming rate.

The transportation system does not consistently provide efficient and reliable access to jobs, education, health care, and other services that residents of all ages and abilities in all parts of the region need to thrive. Orlando does not enjoy the full range of multimodal transportation options—particularly public transit—that many competing regions have developed.

The Partnership and the Alliance for Regional Transportation (ART), which comprise key business leaders from around the region, developed this blueprint for the region's transportation future. A 10-member workgroup representing major employers and members of the ART Executive Committee directed this effort. The workgroup reviewed current trends and disruptions facing the region; identified key mobility challenges and opportunities; reviewed successful practices both within Central Florida and nationwide; and received input from leadership of regional agencies, including the Florida Department of Transportation (FDOT) District 5, MetroPlan Orlando, the Central Florida Regional Transportation Authority (LYNX), and the Central Florida Expressway Authority.

The Partnership Board of Directors adopted seven priorities to guide regional action over the next decade. Achieving these transportation priorities will enhance the safety and security of our transportation system; improve access to jobs, schools, and health care for Central Floridians; and increase the competitiveness of our businesses—positioning Orlando for continued prosperity through 2030 and beyond.



**WE MUST RE-IMAGINE
AND RE-INVENT
TRANSPORTATION IN
CENTRAL FLORIDA FOR
THE 21ST CENTURY.**

SEVEN REGIONAL PRIORITIES

This blueprint calls for action in seven priority areas over the next decade

1

Build out and speed up regional transit systems to achieve a dramatic increase in access to jobs, education, health care, attractions, and services using public and private mobility solutions.

2

Transform all of Interstate 4 (I-4) by adding capacity and incorporating emerging technologies and design techniques, allowing our region's 'main corridor' to achieve the highest levels of safety, efficiency, and reliability.

3

Improve east-west connectivity between key locations throughout Central Florida to support commuting, visitor, and supply chain needs and better integrate our diverse region.

4

Strengthen Central Florida's global gateways for air, space, sea, rail, and highway transportation to support further growth in trade and visitor activity.

5

Lead in transportation innovation including automated, connected, electric, and shared vehicle technologies.

6

Empower a regional transportation authority to oversee expansion, management, and operations of regional public transit systems.

7

Invest boldly in a shared regional vision for transportation to support thriving communities and a globally competitive economy.



TIME FOR CHANGE

For more than 75 years, Orlando’s story has been growth—and this growth and development has been intertwined with its transportation system.

A central location in Florida and forward-looking infrastructure helped jumpstart Orlando’s growth after World War II. Every generation since has brought a new wave of transformational investments in infrastructure to support a growing population and an increasingly diverse economy. The 1950 and 1960s produced what are now Florida’s Turnpike, Interstate 4 (I-4), the regional expressway system, the Orlando International Airport, Port Canaveral, and the Cape Canaveral Spaceport. The 1970s and 1980s brought the LYNX bus system and the beginning of the beltway around Orlando. The past decade brought SunRail, the Wekiva Parkway, and the reconstruction of I-4.

These investments helped Orlando become a global visitor destination, the world’s leading gateway to space, home to the nation’s largest public university, and a growing hub for emerging industries like simulation, life sciences, automation, and design.

But decades of nearly uninterrupted growth have eroded the region’s transportation system. Highway travel is growing more quickly than the population and more than three times as fast as capacity on the highway system. The result has been a continued increase in delay, with total hours of delay in the Orlando urbanized area up more than 81 percent between 2000 and 2017.¹

Traffic delay grows nearly twice as fast as population (Percent growth, 2000-2017)



Sources: U.S. Department of Census, American Community Survey; Texas Transportation Institute, Urban Mobility Report, 2019.

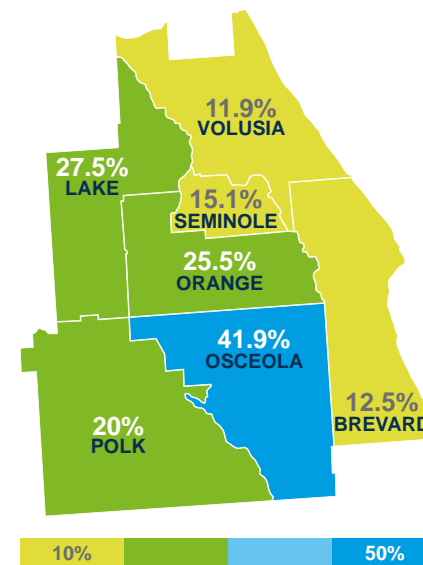
Delay is reported for the Orlando urbanized area.

IT’S ABOUT TIME.

Orlando urbanized area commuters spent 57 hours on average in traffic in 2017, up from 43 hours in 2000—and the actual total would be higher if we had comprehensive data for all local roads and streets. Preliminary data for 2018 suggest double-digit growth in average delay in the past year². The cost of this congestion averages \$1,103 per commuter³. Time spent in traffic means less time with family and friends, less productivity and fewer opportunities for workers, a diminished experience for visitors, and higher costs for regional businesses. Congestion reduces the number of jobs the average Orlando metropolitan area commuter can reach in a 30-minute drive time by 30 percent—and the number within 20 minutes by 45 percent⁴.

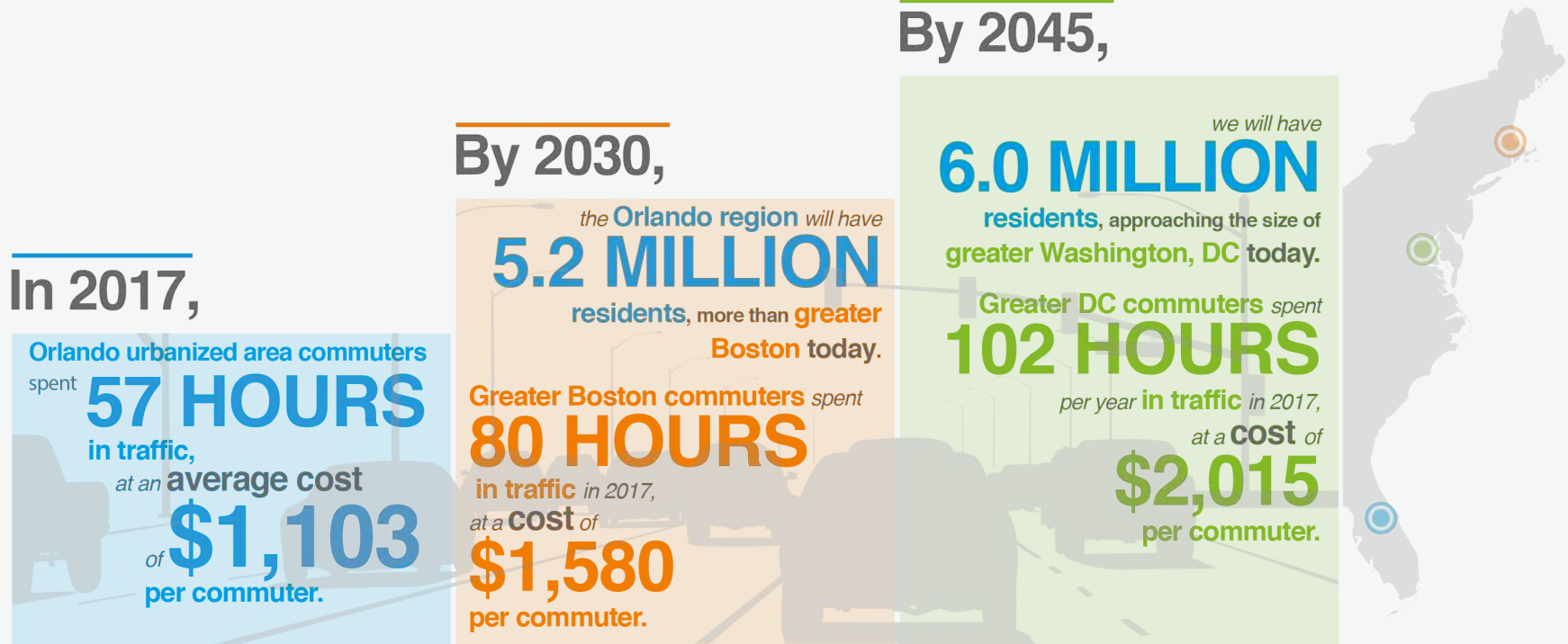
Congestion and delay will expand as Central Florida’s population continues to grow. The seven-county region is projected to add another 800,000 residents by 2030—a net gain of about 1,500 per week⁵. Jobs and visitors are also expected to reach record highs. This will mean continued growth in demand for moving people and goods throughout the region.

Projected population growth (2018-2030)

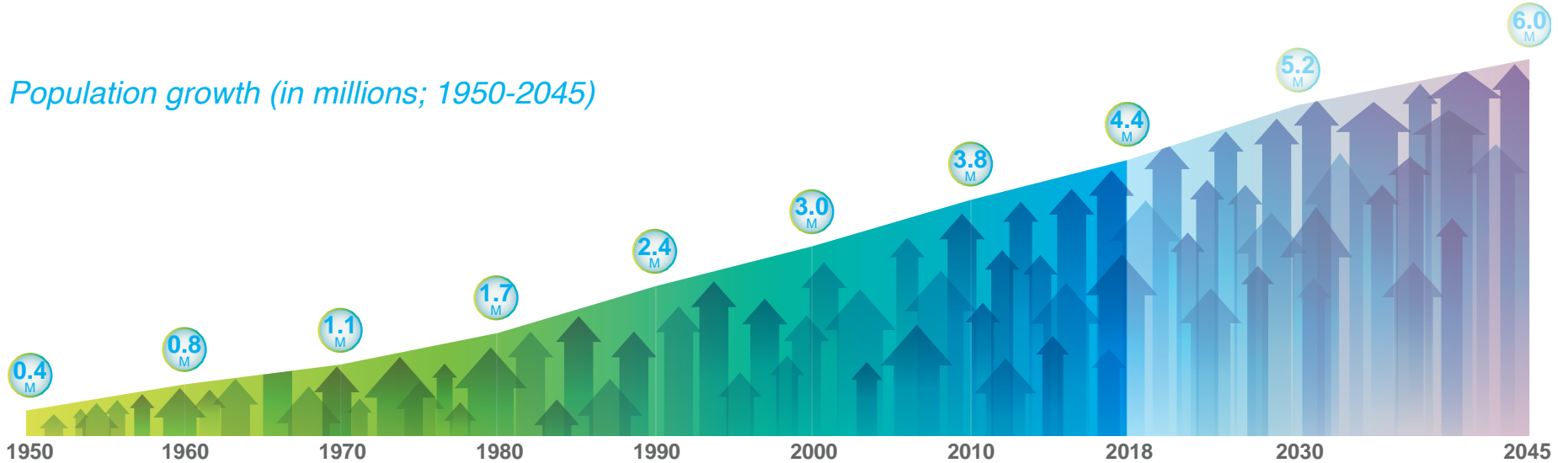


Source: University of Florida, Bureau of Economic and Business Research.

Think congestion is bad today?



Source: Texas Transportation Institute Urban Mobility Report, 2019.



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

With increasing costs, tight budgets, and right of way or community constraints on adding more lanes to many existing roads, we cannot build our way out of congestion. FDOT projects that most major roads in Central Florida will be congested during peak periods by 2045—even after assuming billions of dollars of planned investments move forward.

Highway travel grows nearly five times as fast as transit ridership (Percent growth, 2000-2018)



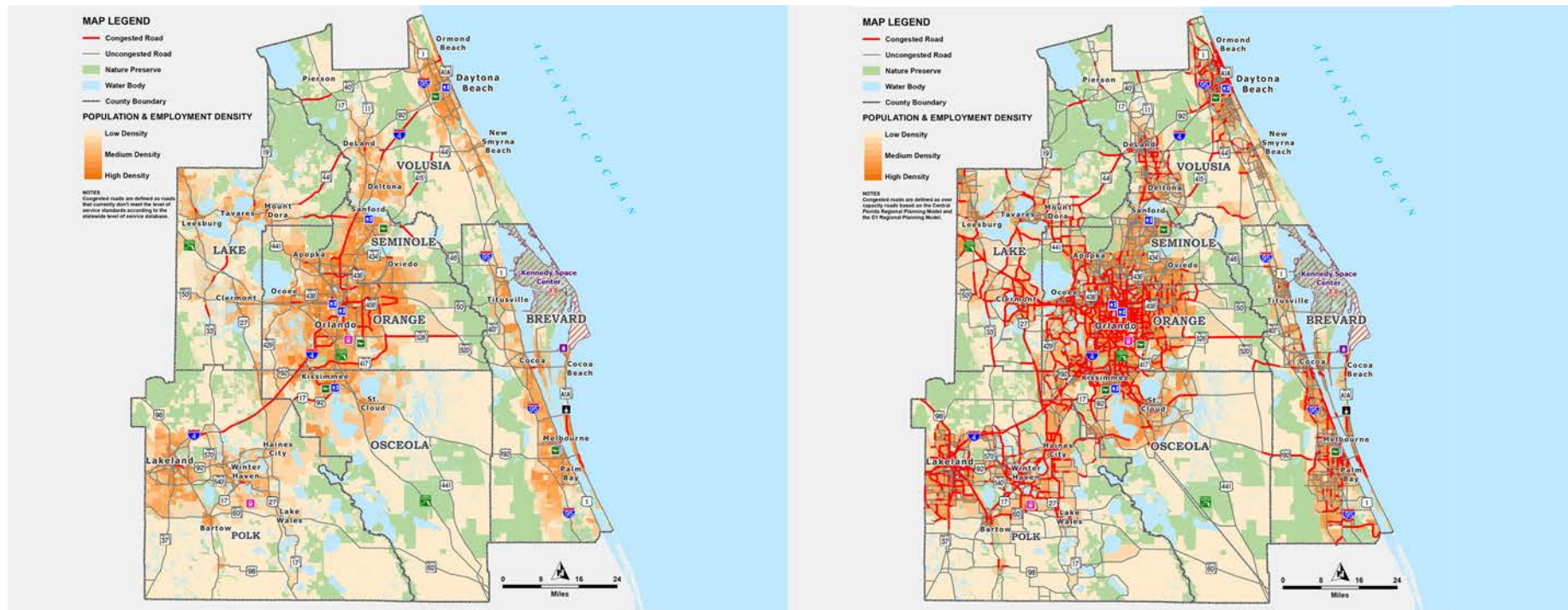
Sources: Federal Transit Administration, National Transit Database; Florida Department of Transportation.

^a From 2002, LYNX only.



Orlando overwhelmingly depends on highways to move people and goods. More than nine out of 10 Central Florida residents commute to work in a motor vehicle, which is higher than most peer regions⁶. Transit ridership on the core LYNX system has grown less than 13 percent since 2002⁷.

Congested highways during peak periods (2018 and 2045)

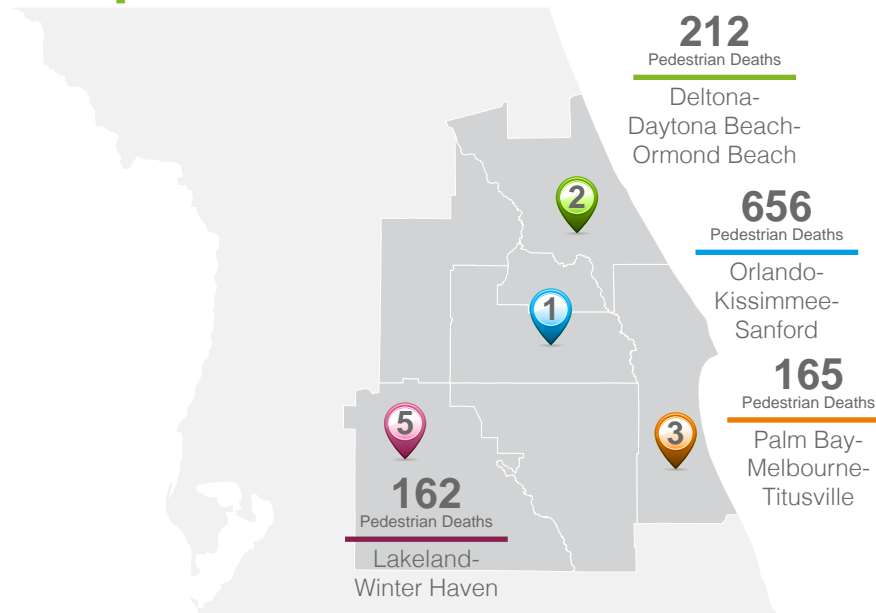


Source: Florida Department of Transportation, December 2019.

IT'S ABOUT SAFETY.

Our dependence on highways—as well as historic land use and urban design patterns—creates safety risks for drivers, bicyclists, and pedestrians. The Orlando metropolitan area is ranked the most dangerous in the nation for pedestrians, with three other Central Florida metropolitan areas ranking among the top five⁸.

4 of the 5 most dangerous areas nationally for pedestrians are in Central Florida



Source: Smart Growth America, *Dangerous by Design*, 2019.

Note: Pedestrian deaths are 2008-2017.

IT'S ABOUT ACCESS TO OPPORTUNITY.

Our increasingly diverse population will require an increasingly diverse range of transportation options to travel to jobs, schools, health care, and other services. Sometime before 2030, the number of seniors will exceed one million and outnumber children under 18 for the first time⁹. More of our residents will face disabilities or chronic health conditions, and many will have limited English proficiency. Our population and visitors increasingly will demand a wide range of safe and convenient transportation options—including alternatives to driving alone.

A Diverse Population



18% of population over 65



21% of population under 18



14% of population lives below the poverty line



5% of population has limited English proficiency



14% of population has one or more disabilities



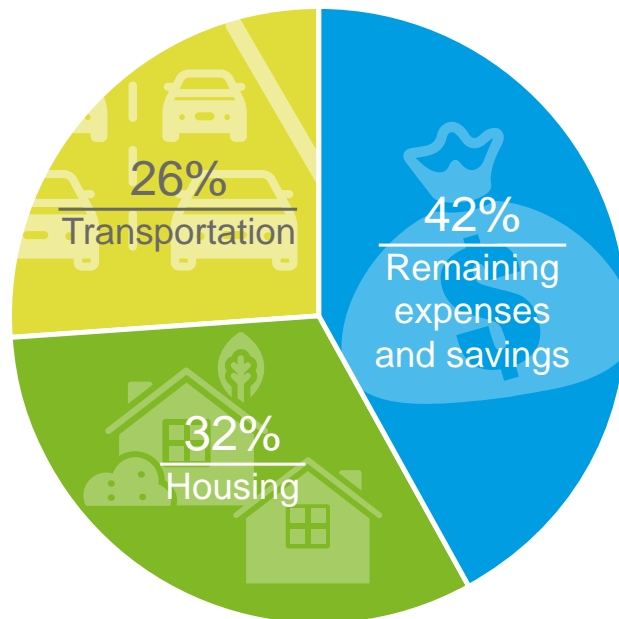
5% of households do not have a motor vehicle

Source: U.S. Census Bureau American Community Survey, 2018.

IT'S ABOUT AFFORDABILITY.

Limited transit options and longer commutes as residents seek affordable housing locations are driving up the cost of transportation in Orlando. The average resident in the Orlando metropolitan area spends nearly \$13,000 per year in auto ownership and gas, representing about 26 percent of the median income¹⁰. About one out of six households falls below the poverty line, and 45 percent of residents in the seven counties have limited income and assets and often must watch their transport costs carefully.¹¹ Lower-income households seeking to commute without a car often end up taking long and circuitous bus routes. These challenges will become more significant as we become more tied together and our residents routinely travel across city and county boundaries to get to work, visit friends and family, shop, and enjoy all the region has to offer—again, pointing to the need for more affordable transportation options that seamlessly tie together.

Housing and transportation costs account for 58 percent of median household income in metropolitan Orlando



Source: Center for Neighborhood Technology, Housing + Transportation Affordability Index, 2019.

Data are for the Orlando-Kissimmee-Sanford MSA.”

IT'S TIME TO MOVE ORLANDO'S TRANSPORTATION SYSTEM FORWARD FOR THE NEXT GENERATION.

AND IT'S ABOUT CONNECTIVITY FOR COMMERCE.

Tourism, agriculture, and construction all remain essential, but Orlando's economy is becoming more diverse with growth in aviation and space, logistics and distribution, life sciences and health services, simulation, and arts and design. These industries require a diverse, multimodal transportation system to speed goods and services to market—as well as connectivity to national and global markets to reach customers, suppliers, and talent.

It's time to move Orlando's transportation system forward for the next generation. **We can work together to re-invent transportation in Orlando.** We can make transit—as well as walking and bicycling and new forms of travel like scooters—a safe and competitive choice for residents and visitors across the region. We can renew and transform our existing corridors, including both I-4 and major east-west corridors. We can improve connectivity at all scales, from global to local. We can leverage technology to provide seamless mobility solutions across modes, and we can rethink the meaning of mobility and retool our processes and investment strategies to help us get there.



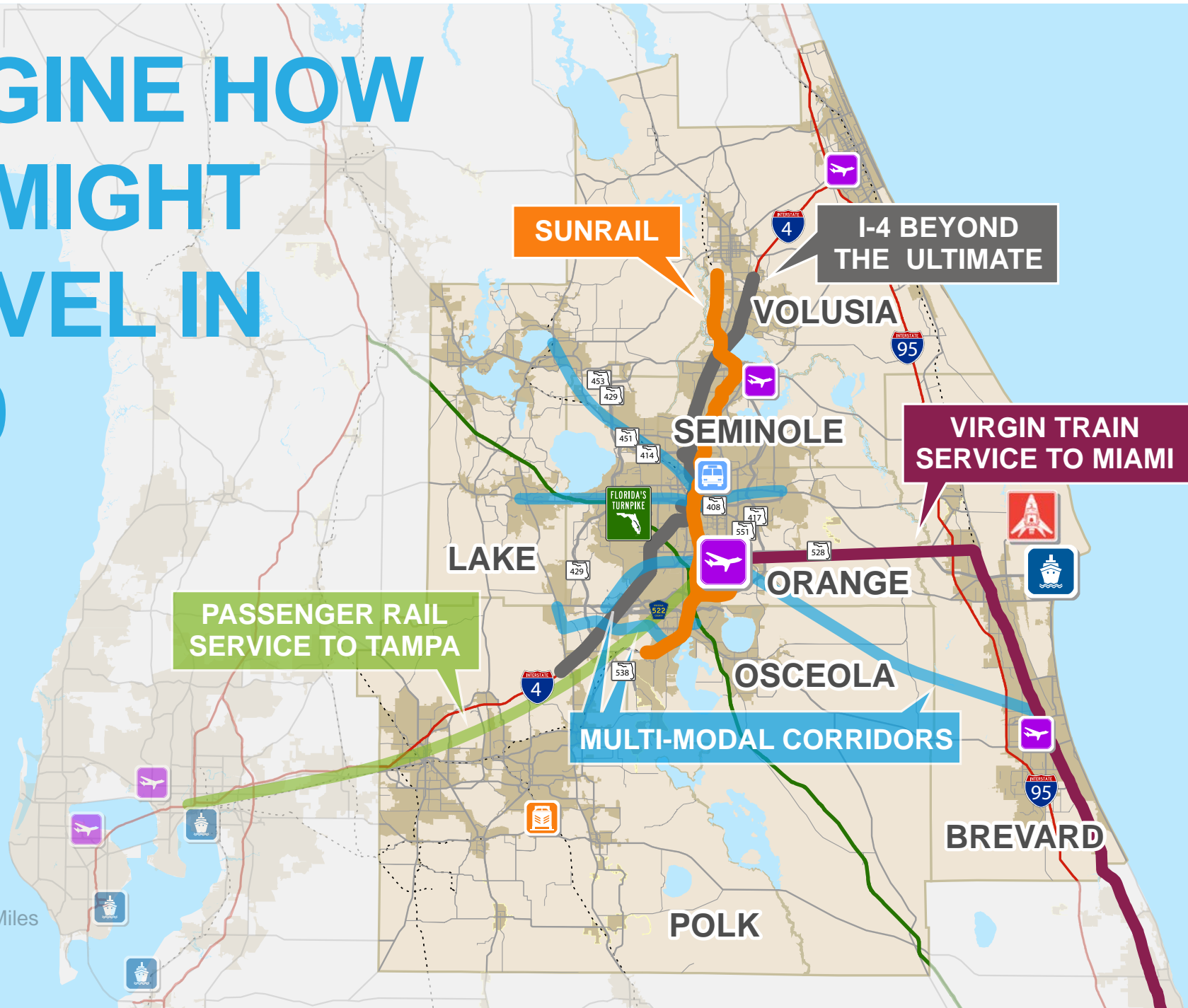
OUR TRANSPORTATION VISION

IMAGINE HOW WE MIGHT TRAVEL IN 2030

Legend

- Commercial service airport
- Deepwater seaport
- Spaceport
- Intermodal Logistics Center
- LYNX Central Station
- Interstates
- Florida Turnpike
- Expressways
- Major Rail
- Urbanized Areas
- Counties

0 20 Miles





A business based in Kissimmee customizes products for customers worldwide—with **same day delivery through Orlando International Airport** or the cluster of e-commerce providers in Lakeland...



A visitor flies into **Orlando International Airport** and rides a **driverless shuttle** to a hotel in the attractions areas with the ride from the airport becoming the first attraction on the trip...



A designer meets with clients in Orlando, takes **SunRail to the airport**, and then jumps on **passenger rail to Tampa**, arriving just in time for a dinner meeting...



An entrepreneur lives in Sanford, **walks or uses a scooter** to get around town, and **rides SunRail** to investor meetings in Orlando; on the weekends, she uses a **shared automated vehicle** to explore Florida's outdoor areas...



A resident lives in Clermont and commutes into downtown Orlando using **bus rapid transit to LYNX Central Station** and an **e-scooter to the office**—and then picks up dry-cleaning and dinner at the station before a trip home...



A college student takes classes at the University of Central Florida (UCF) main and downtown campuses and collaborates with team members at Valencia College—**visiting all campuses in a single day using transit** and working online during each trip...



A simulation specialist lives in Lake Nona, teaches at UCF, and partners with Space Florida—using **high-speed transit** to travel between these locations multiple times a week...



A hospitality worker lives in West Orange County and **commutes to a hotel on I-Drive via bus** daily. Thanks to a new **BRT line**, the trip typically takes under 30 minutes each way, enabling the worker to see his children off to school and return home in time to help with homework...



OUR PRIORITIES

Build out and speed up regional transit systems.














WHY THIS MATTERS

Orlando's transit system today does not meet the needs of residents, visitors, and businesses in a growing, diverse economy:

- LYNX, the regional bus system serving Orange, Osceola, and Seminole Counties, operates 310 buses over a 2,500 square mile service area—one of the largest in the nation. The number of buses operated by LYNX has not increased significantly over the past few decades, despite the region's robust population growth. Walt Disney World operates more buses than LYNX with a service area 63 times smaller, while Orange County Public School System operates nearly three times as many buses as LYNX¹².
- Although LYNX reports headway of gaps of as little as 15 minutes between service on its highest-frequency routes, average frequency is about every 30 minutes in the urban areas and outlying routes generally run once per

hour. Regions like Denver and San Diego enjoy transit systems that operate nearly 24 hours per day with higher frequency than LYNX.

- SunRail commuter rail service provides a premium transit option along a heavily traveled north-south corridor, but its 30- to 60-minute headways and lack of late night, weekend, or holiday service limits its appeal.
- Brevard, Lake, Polk, and Volusia Counties also operate fixed-route transit systems, but there are few connections for cross-county trips.
- The average metropolitan Orlando resident can access an estimated 5,596 jobs by transit within a 30 minute commute time—about half of the jobs accessible in the same time as a resident in Pittsburgh, less than one-third as many as a resident in Denver, and a fraction of the number accessible via auto in the same travel time¹³.

| |  LAS VEGAS |  PITTSBURGH |  CHARLOTTE |  ORLANDO |  DENVER |  SAN DIEGO |
|--|--|--|--|--|---|--|
|  Population (millions) 2018 | 2.2 | 2.3 | 2.6 | 2.6 | 2.9 | 3.3 |
|  Annual Ridership (millions) 2018 | 71.0 | 66.2 | 22.5 | 25.9 | 104.9 | 98.1 |
|  % Commuting via Transit 2018 | 3.3% | 5.6% | 1.5% | 1.3% | 3.8% | 2.6% |
|  % Ridership on Rail or Bus-Rapid Transit 2018 | 6.8% | 11.1% | 32.9% | 8.2% | 31.4% | 37.9% |
|  # of Jobs within 30 min of Transit 2017 | 8,350 | 12,317 | 7,682 | 5,596 | 20,665 | 12,109 |

Source: Population—U.S. Census Bureau; Transit Ridership—Federal Transit Administration, National Transit Database; Commuting—U.S. Census Bureau, American Community Survey; Premium Service—Federal Transit Administration, National Transit Database; Jobs Access—University of Minnesota Center for Transportation Studies. Data for Orlando represent the Orlando-Kissimmee-Sanford Metropolitan Statistical Area (MSA)

These constraints limit the region's ability to serve customers who are dependent on transit because they cannot afford or are unable to operate a motor vehicle, and they limit transit's ability to provide a compelling alternative to driving for those customers who can make a choice. About 1.3 percent of metropolitan Orlando residents use transit to commute to work, well below the share in Pittsburgh, Denver, Atlanta, or Las Vegas. A more robust transit system with greater frequency would enhance access to jobs, education, health care, and other services; provide an alternative for visitors and for social and recreational travelers; and expand the potential workforce for regional businesses.

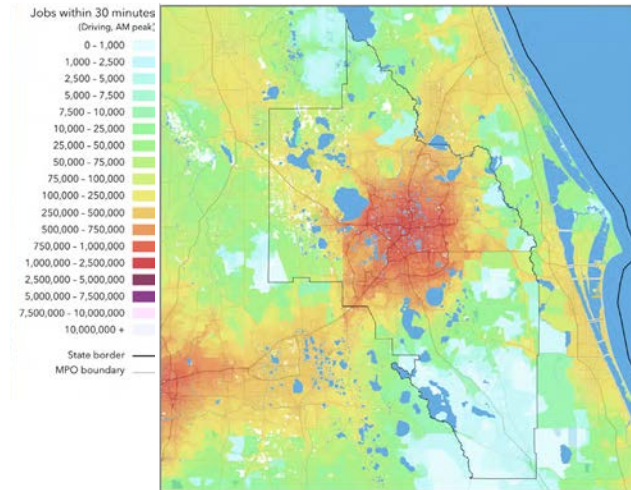
WHAT WE MUST DO

Orlando must develop a world-class transit system, providing the same level of leadership for transit that the region has for expressways, airports, seaports, and spaceports. A significant investment in regional transit expansion and operations should focus on two outcomes:

- **Improve service**
 - » Increase service frequency, expand evening/late night service, and create weekend service for SunRail.
 - » Optimize LYNX and other transit system route structures to increase the frequency and coverage of service to job centers, residential centers, attractions, and health care and educational institutions.
 - » Modernize and expand the size of the LYNX bus fleet.
 - » Increase the share of regional transit routes using premium (higher-speed) transit options, including bus-rapid transit.
 - » Identify opportunities to use interstate, turnpike, expressway, rail, and other major corridor right of way to provide express transit service.
- **Enhance connectivity**
 - » Provide a connection between SunRail and the Orlando International Airport.
 - » Enhance connectivity between SunRail, LYNX, and private mobility services (e.g., transportation network companies, e-bikes, and scooters) at SunRail stations so these stations function as regional mobility hubs.

- » Provide seamless connectivity and customer service between SunRail, LYNX, and other public and private mobility providers, including coordination of scheduling, marketing, and payment.
- » Improve regional transit connections across county lines, such as expanded service areas or express bus services with transfer points.

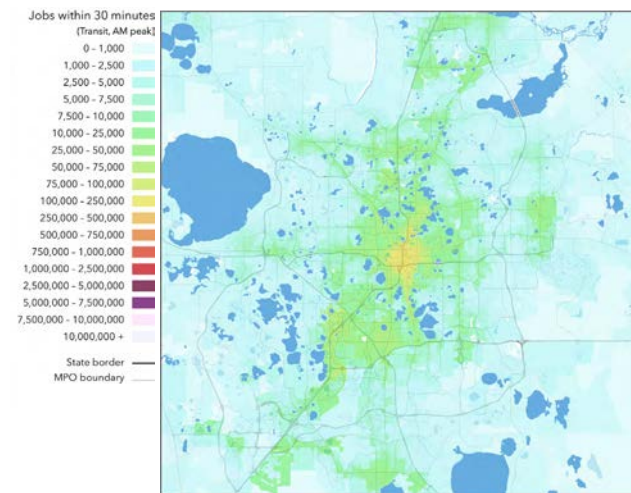
Jobs within 30 mins (Orlando-Kissimmee-Sanford, FL) Auto



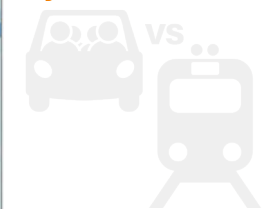
The average metropolitan Orlando resident can access nearly

527,000 JOBS by car within a 30 minute commute time – but only

Transit



5,600 by transit



Source: Center for Transportation Studies, 2017.

OUR PRIORITIES

Transform all of I-4.

2

WHY THIS MATTERS

The I-4 corridor acts as the spine of Orlando's transportation system and, for many of us, is the primary means of travel within the region. I-4 provides essential connectivity within the region and also to Tampa Bay, which is quickly becoming integrated with Central Florida into a "super region."

Traffic on I-4 continues to rise, with some segments carrying as many as 235,000 vehicles per day—far more than I-4 originally was designed to accommodate. In recent years, delay on I-4 has increased and reliability has decreased: in 2017, only about two out of every five I-4 trips in Orange, Osceola, and Seminole Counties were "on time" (defined as occurring at a speed of at least 45 miles per hour).¹⁴

FDOT has initiated the \$2.3+ billion "I-4 Ultimate" project to reconstruct 21 miles of I-4 from west of Kirkman Road in Orange County through downtown Orlando to east of State Road 434 in Seminole County. The project, scheduled for completion in 2021, will add four express toll lanes in the median and reconstruct 15 major interchanges.

FDOT has identified concepts for "I-4 Beyond the Ultimate" to the north and south of this 21-mile segment, but funding for most of these projects has not yet been identified. If this full range of improvements does not move forward, the chokepoints on I-4 will shift to different spots along the corridor—a particular concern in Osceola and Polk Counties where both freight and visitor traffic continues to rise.

We must work together to continue to advance solutions for improving efficiency, reliability, and safety along all of I-4—as well as creating alternatives to I-4 both regional and interregional trips.

WHAT WE MUST DO

- Secure funding for and accelerate completion of I-4 Beyond the Ultimate, especially the southern segments in Orange, Osceola, and Polk Counties.
- Provide alternatives to I-4 for local trips by improving transit service and enhancing connectivity of the local street network.
- Coordinate future requests for new interchanges on I-4, particularly in Osceola and Polk Counties, to ensure efficient flows of people and freight.
- Deploy advanced technologies along I-4 and other corridors to improve safety and efficiency, working with public, private, and academic partners.
- Explore opportunities to create a parallel corridor to I-4 by linking existing and proposed expressways and other limited access roads in Brevard, Osceola, and Polk Counties.

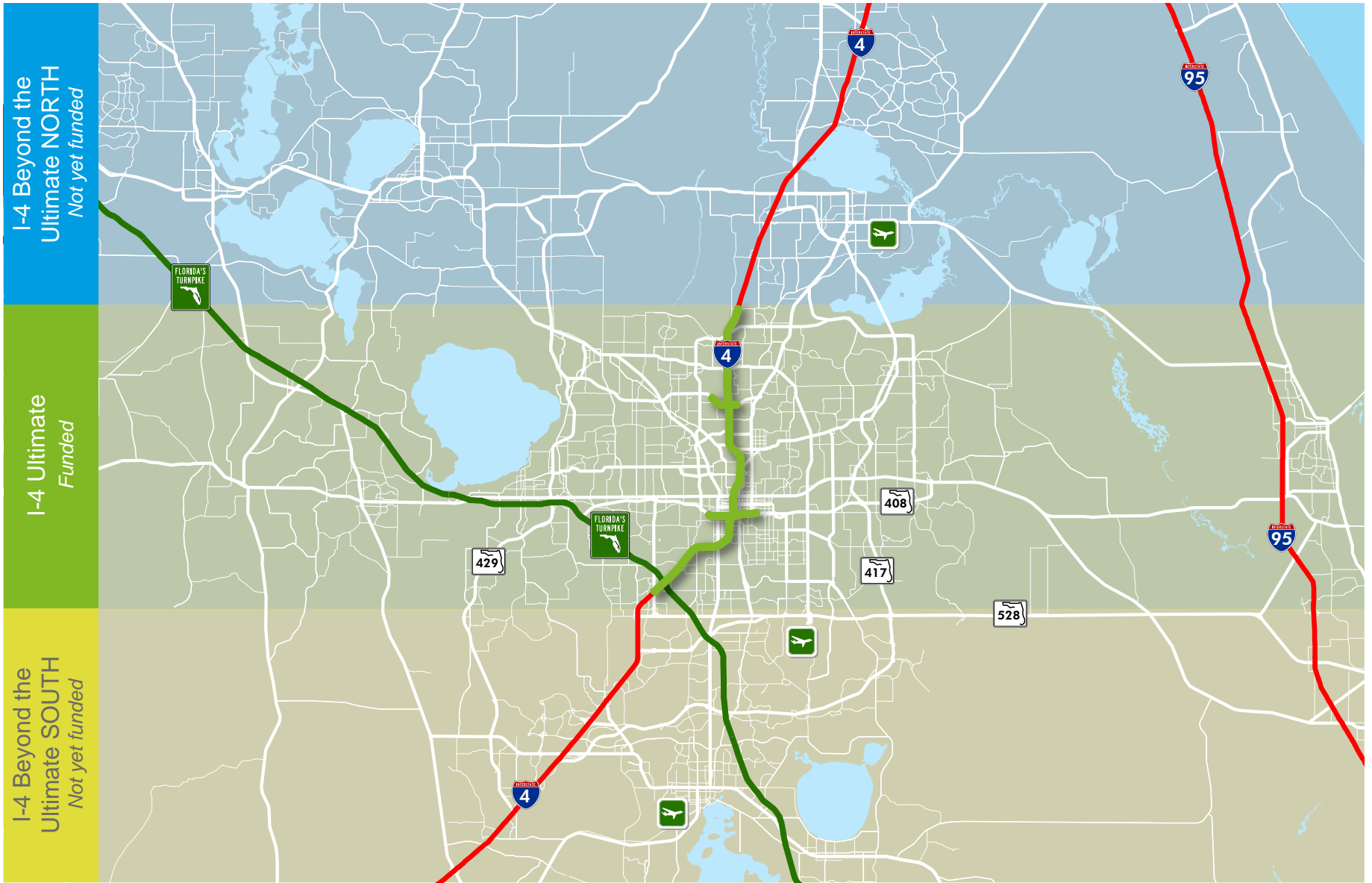
**2 out of 5
TRIPS**

on I-4 in Orange

Osceola or Seminole

Counties are completed "on time"

Source: Florida Department of Transportation, 2017.



OUR PRIORITIES

Improve east-west connectivity.

3

WHY THIS MATTERS

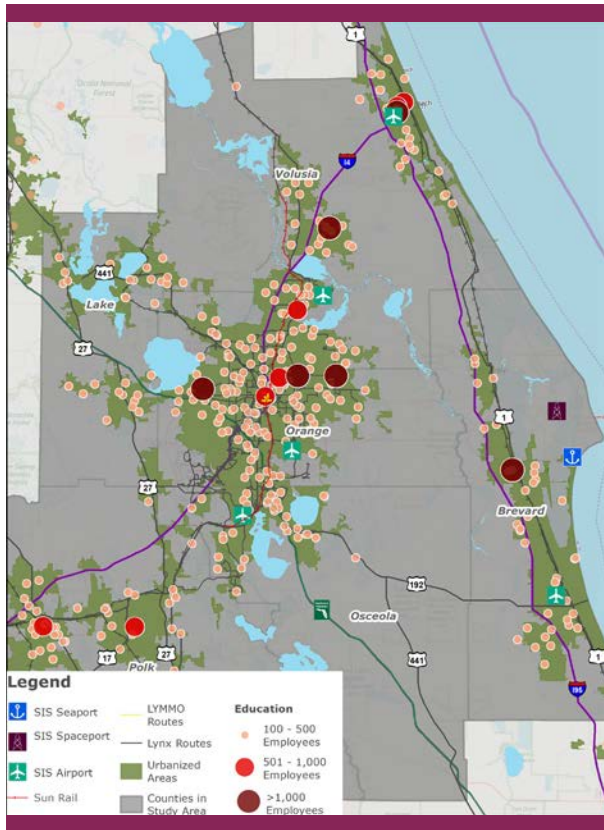
Orlando's major transportation corridor, I-4, runs north-south, but many commuting, business, and freight trips require east-west travel. About 417,000 residents both live and work in Orange County, often traveling on east-west trips. More than 460,000 residents work in the urban core (Orange, Osceola, and Seminole Counties) and live in other counties in Central Florida or beyond—more than a third of the workforce in those three counties.¹⁵ And many major destinations—including major colleges and universities, hospitals, and master planned developments—are spread throughout the region on both sides of I-4.

East-west travelers today must use regional expressways including SR 408, SR 528, and the 417/429 beltway; local roads and streets; or LYNX and other bus services. Continued growth requires better east-west connections, whether from the airport area to the attractions, from fast-growing western Orange or Lake County to downtown Orlando, or Brevard County to the Orlando International Airport (OIA) and Lake Nona. Creative solutions to improve east-west connections can help relieve I-4, expand regional transit service, and support development of more compact population and employment centers, including locations with workforce housing. Using existing east-west transportation corridors, such as the region's expressways, for multiple modes of transportation like bus rapid transit could help tie the region together.

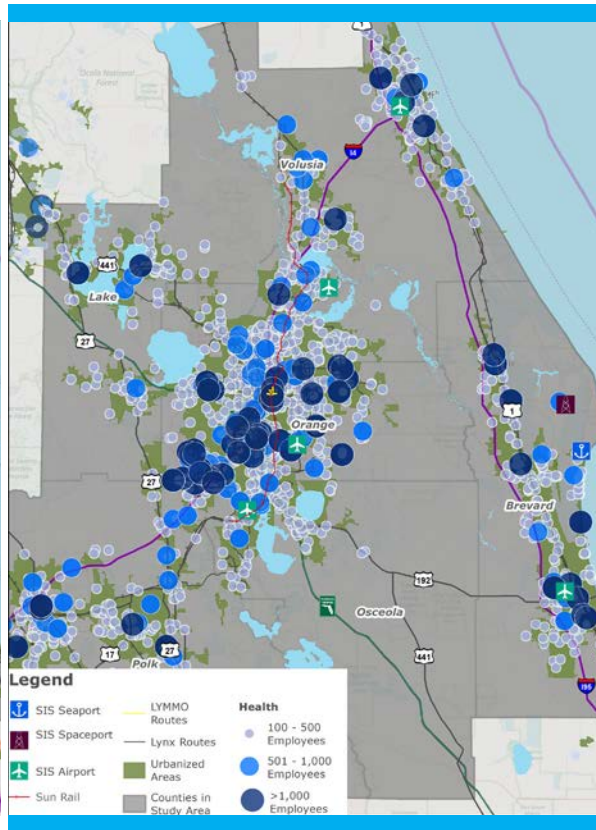
WHAT WE MUST DO

- Significantly increase the efficiency and mobility of travel along key east-west corridors to connect concentrations of population, jobs, attractions, education, health care, and other services. Potential corridors include:
 - » Between the Orlando International Airport, the Orange County Convention Center/International Drive, and the attractions areas.
 - » Between Orlando and eastern Orange County, near the University of Central Florida.
 - » Between Orlando and western Orange and Lake Counties (Clermont and Horizon West).
 - » Between Orlando and northwest Orange and Lake County (Apopka, Mount Dora, Tavares, and Eustis).
 - » Between Orlando International Airport/Lake Nona and Brevard County centers including Cocoa/Cape Canaveral and Melbourne.
 - » Between Kissimmee/St. Cloud and the attractions areas.

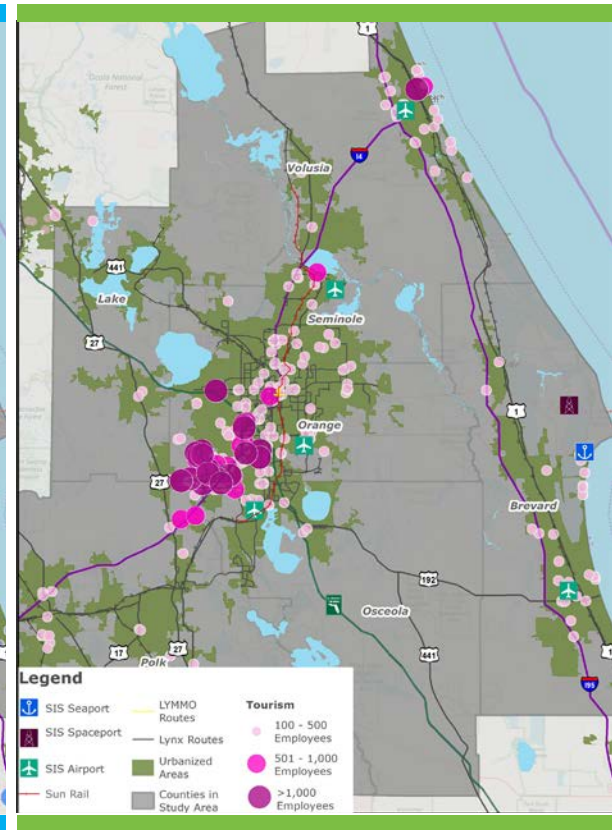
Jobs in Education



Jobs in Health Care



Jobs in Tourism



Source: InfoGroup.

OUR PRIORITIES

Strengthen Central Florida's global gateways.

4

WHY THIS MATTERS

Orlando is home to unique transportation hubs and resources that, with greater connectivity, could further solidify the region's position as a premier hub for global tourism, trade, and innovation. This region is home to the world's only "quintimodal hub," an area where five key modes of transportation converge, providing a competitive advantage found nowhere else in the world:

- **Orlando International Airport** is the largest commercial service airport in Florida and the 10th largest nationally. Other regional commercial and general aviation airports play important niche roles, including Orlando-Sanford International, Daytona Beach International, Orlando Melbourne International (aircraft maintenance, repair, and operations), and Lakeland Linder International (e-commerce).
- **Port Canaveral** is the world's second busiest cruise port and the region's premier cargo hub.
- **Cape Canaveral Spaceport** is the world's most capable spaceport and the region's connection to space.
- **CSX's** Winter Haven intermodal freight terminal and adjacent **Florida's Gateway Intermodal Logistics Center** and smaller intermodal hubs in Orlando and Titusville provide critical, value-added services and transfers between rail and highway freight transportation.
- **I-4, I-95, and Florida's Turnpike** provide key connections to the rest of Florida and to other states.

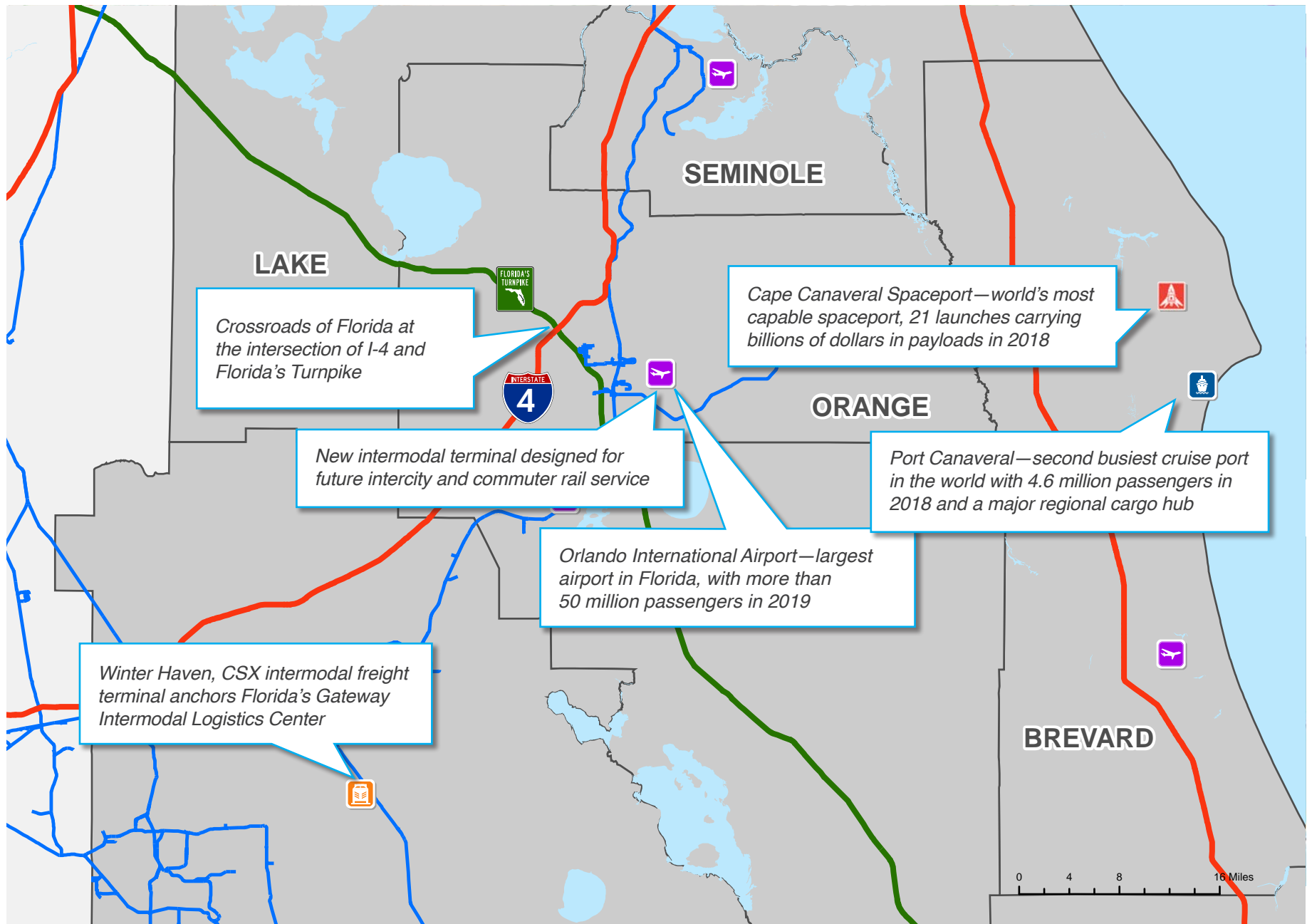
WHAT WE MUST DO

- Promote ongoing investments to maintain the preeminent regional

role of Orlando International Airport, including air service development, capacity expansion, and intermodal connection to SunRail and intercity rail.

- Encourage ongoing expansion of the Cape Canaveral Spaceport to maintain Central Florida's leading role in commercial and government space launch and grow the state's role in space industry growth and related private investment.
- Promote future expansion of Port Canaveral cruise and cargo operations, including landside connections.
- Encourage development of interregional rail connections between Orlando and Miami and Tampa.
- Advance continued improvements to I-4, I-95, and Florida's Turnpike, as well as improved connectivity between Central Florida and Southwest Florida so that Orlando residents and businesses can easily connect to all major urban areas in Florida.

Five major hubs in a 100-mile corridor



OUR PRIORITIES

Lead in transportation innovation.

5

WHY THIS MATTERS

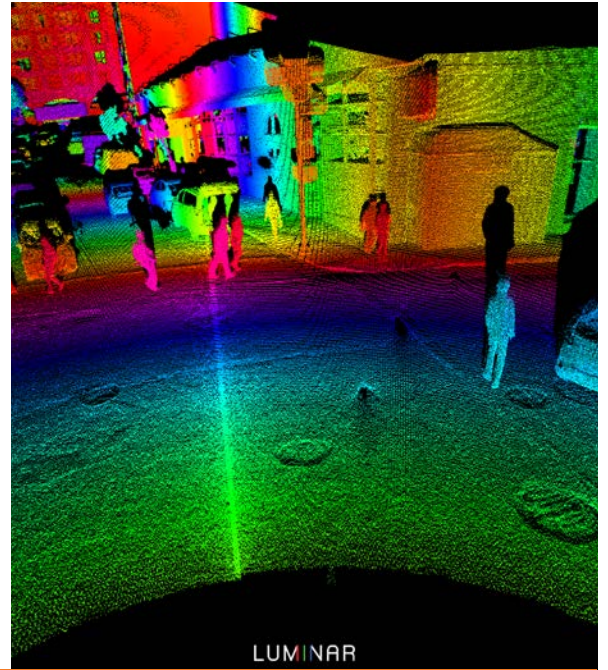
Technology and emerging business practices are rapidly changing the way people choose to travel. The internet and smart phones allow employees to work from almost anywhere whether in a coffee shop or while riding transit; ridesharing services, such as Uber and Lyft, provide an affordable alternative to renting or owning a vehicle; and new micromobility options, like electric scooters and bikeshares, facilitate efficient last-mile connectivity. Emerging technologies, such as automated, connected, electric, and shared vehicles, promise a safer and more efficient transportation system while providing a stress-free experience for customers.

Orlando is in a unique position to become a hub and test bed for transportation innovation, building on the region's designation as a national autonomous vehicle proving ground and forward-looking state legislation. The region's large population and enormous visitor market provides the setting and scalability for a diverse set of test cases. Orlando's competencies in simulation, aviation, defense, and history in space exploration combined with specialized university research and a robust talent pipeline make this the ideal location to develop and test autonomous technologies.

Florida's Turnpike Enterprise has developed SunTrax, an automated vehicle testing facility, in Auburndale. Communities such as Lake Nona and The Villages are testing specific applications. Universities and colleges, in collaboration with other partners such as FDOT, the City of Orlando, Kennedy Space Center, and the Central Florida Expressway Authority, formed the Central Florida Automated Vehicles Partnership to test new technologies, identify promising practices, and facilitate deployment.

WHAT WE MUST DO

- Create, attract, and expand transportation technology companies in Orlando through partnerships with business, research, and educational institutions.
- Expand "smart city" initiatives to use technology, data, and connectivity to address regional challenges, including mobility, public health and safety, and emergency response.
- Advocate for investments in technology infrastructure to support autonomous, connected, and electric vehicles, such as broadband, sensors, smart signals, and electric vehicle charging stations.
- Constantly engage regional leaders about disruptions and new opportunities to improve mobility through programs that illuminate emerging technology and trends.
- Develop and retain a workforce with skills in transportation technology, logistics, and related occupations.



OUR PRIORITIES

Empower a regional transportation authority.

6

WHY THIS MATTERS

Regions with forward-looking transportation systems typically have formed and empowered a regional transportation authority to oversee development, operation, and management of regional transit systems. The most successful systems are characterized by a strong customer service focus; a service area and route structure that provides economies of scale and matches the flow of commuting and other regional trips; a performance-based capital planning system; and access to an independent and sustainable source of funding.

Multiple entities are responsible for planning and operating Central Florida's transit system today. LYNX operates regional bus and paratransit services in Orange, Osceola, and Seminole Counties. FDOT currently operates SunRail, under the guidance of the Central Florida Commuter Rail Commission. MetroPlan Orlando guides long-term planning for regional transit and integration of transit with other modes. Brevard, Lake, Polk, and Volusia Counties each operate their own fixed-route systems.

The need to transition SunRail to regional management and operations by 2021 provides an opportunity to rethink transit planning and operations in Orlando, potentially facilitating a consolidated authority to manage all forms of transit in the three core counties. At the same time, shifting LYNX from dependence on annual general fund allocations by its three member counties to a sustained funding commitment would facilitate strategic planning and performance-based investment to enhance service along key corridors.

WHAT WE MUST DO

- Streamline the Central Florida Commuter Rail Commission (SunRail) and Central Florida Regional Transportation Authority (LYNX) Board of Directors into a single entity responsible for public transportation systems in Orange, Osceola, and Seminole Counties.
- Transfer management and operations of SunRail from FDOT to this combined entity, including necessary changes to operating and interlocal agreements.
- Provide commitments from Orange, Osceola, and Seminole Counties for sustainable, performance-based funding for LYNX/SunRail operations and maintenance, including development of a five-year capital program.
- Coordinate public transportation systems in surrounding counties with this combined entity, through interlocal agreements or expanded service areas over time.

OUR PRIORITIES

Invest boldly.

7

WHY THIS MATTERS

Finally, Orlando must make a bold commitment to a regional transportation vision that can be sustained over time.

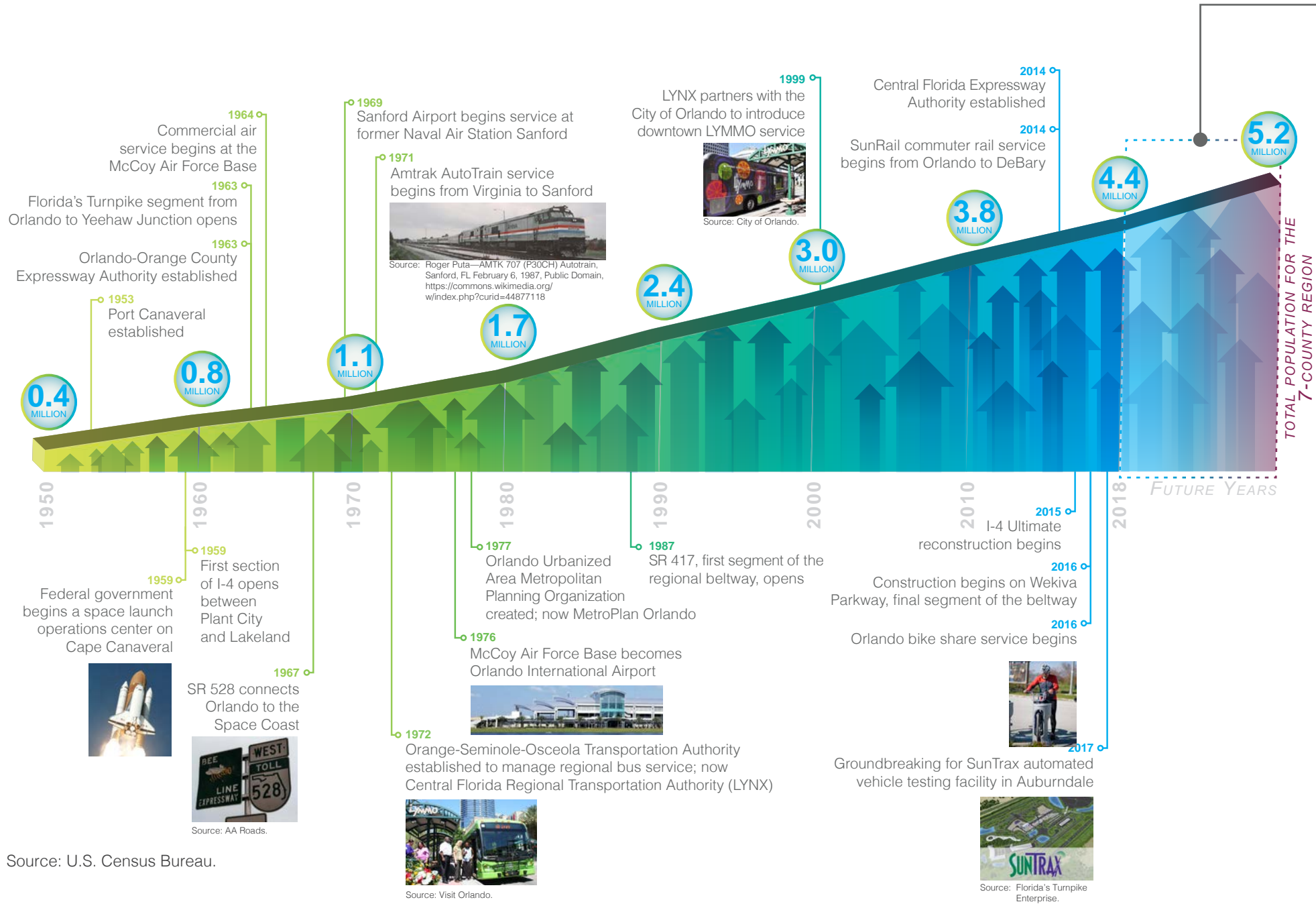
Elements of this commitment are in place today, but they need to be refreshed to reflect the changing opportunities and challenges facing the region. The *How Shall We Grow?* shared regional vision, adopted by seven counties and numerous cities in 2007, focuses future growth in mixed-used centers connected by multimodal transportation corridors. MetroPlan Orlando, as a three-county metropolitan planning organization (MPO), regularly develops and updates a metropolitan transportation plan (MTP) to define long-range priorities for regional investment, and coordinates with surrounding MPOs to address larger-scale issues. These building blocks can be reinforced and updated to carry forward the priorities in this report.

In addition, the region must creatively draw upon a mix of local, regional, state, federal, and private sector funding sources to invest in the priorities in this report. Creative approaches are important due to increasing costs and declining value of the motor fuel tax, the primary means of funding transportation at the federal and state levels. The region should redouble efforts to pursue targeted federal or state funding to complete I-4 reconstruction and support the major transit capacity investments, while also looking at how to better leverage available regional investments. In particular, the seven counties could tap into nearly \$1.9 billion per year in unrealized revenues from local option sales taxes (including those specifically created by the Legislature as tools for regional transit investments), as well as an estimated \$70 million per year in unrealized revenues from local option gas taxes.¹⁴

WHAT WE MUST DO

- Convene public, private, and civic partners to update the *How Shall We Grow?* shared regional vision.
- Create a unified regional transportation plan, building on the MetroPlan Orlando long-range planning process in partnership with other agencies.
- Coordinate transportation strategies with economic development, workforce development, land use, community development, housing, environmental stewardship, and public safety/emergency response.
- Continue close coordination with metropolitan planning organizations, counties, transit providers, and other partners across the I-4 corridor from Daytona and the Space Coast to Tampa Bay.
- Aggressively pursue federal or state transportation funding for priority regional projects (I-4 Beyond the Ultimate, SunRail connection to OIA, east-west multimodal corridors).
- Support local government funding initiatives where consistent with this vision.
- Monitor trends impacting current and potential future revenue generation approaches, including the potential impact of increased fuel efficiency and growth in the number of electric vehicles on motor fuel tax collections.
- Continue to inform and develop community leaders through ART and other Partnership initiatives; provide permanent staff support for ART.

ORLANDO'S TRANSPORTATION TIMELINE





NEXT STEPS

The Partnership and ART have developed the blueprint in this report to guide local, regional, state, and federal leaders as they plan the region's transportation future. This blueprint provides overall strategic direction, with the expectation that priorities and actions will be refined on an ongoing basis. To initiate implementation, the Orlando Economic Partnership and ART will:

- Communicate the recommendations in this report to key partners and encourage ownership of specific actions.
- Continue to convene educational sessions to build awareness about regional transportation challenges, opportunities, and priorities.
- Advocate for public policies and investments that support these priorities.
- Monitor progress toward implementation by developing an annual "report card" on Central Florida transportation.
- Adjust specific priorities and actions over time to take advantage of changing conditions and opportunities.

ENDNOTES

- ¹ Texas Transportation Institute. (2019). Urban Mobility Report
- ² INRIX Global Traffic Scorecard. 2019
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- ⁴ University of Minnesota. (2017). Access Across America, Auto
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- ¹² Orlando Sentinel. (2019). "Orlando's Public Transit System Fails Tourism Workers."
- ¹³ University of Minnesota. (2017). Access Across America: Transit
- ¹⁴ Florida Department of Transportation, 2017
- ¹⁵ U.S. Census Bureau, Longitudinal Employer Household Dynamics (LEHD) - All Jobs 2017 (most recent data available)
- ¹⁶ Florida Legislature, Office of Economic and Demographic Research, Local Government Financial Information Handbook, November 2019

Where possible, data in this report cover the entire seven-county Central Florida region (Brevard, Lake, Orange, Osceola, Polk, Seminole, and Volusia Counties). In some cases, data are only available at the metropolitan statistical area (MSA) level, and are reported for the Orlando-Kissimmee-Sanford MSA, which includes Lake, Orange, Osceola and Seminole Counties. In other cases, data are only available at the urbanized area level, and are reported for the Orlando urbanized area, which covers portions of Lake, Orange, Osceola and Seminole Counties.



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