

County Population
1980-2020

County	Turnpike Interchanges and Facilities	Population (000)					Average Annual Growth ('80-'20)
		1980	1990	2000	2010	2020	
Miami-Dade	HEFT (0 through 35), 3X	1,626	1,937	2,253	2,496	2,702	1.3%
Broward	HEFT (39, 43, 47), 49, 53, 54, 58, 62, 66, 67, 69, 71, Sawgrass Expressway	1,018	1,255	1,623	1,748	1,944	1.6
Palm Beach	75, 81, 86, 93, 97, 99, 107,109, 116	577	864	1,131	1,320	1,492	2.4
Martin	133	64	101	127	146	158	2.3
St. Lucie	138, 142, 152	87	150	193	278	329	3.4
Osceola	193, 240, 242, 244, 249, SCE, Western Beltway, Part C	49	108	172	269	389	5.3
Orange	251, 254, 259, 265, 267, 272, Beachline West/East, SCE, Western Beltway, Part C	471	677	896	1,146	1,430	2.8
Lake	278, 285, 289, 296	105	152	211	297	384	3.3
Sumter	304, 309	24	32	53	93	130	4.3
Seminole	Seminole Expressway	180	288	365	423	471	2.4
Polk	Polk Parkway	322	405	484	602	725	2.0
Hillsborough	"Veterans Expressway, Suncoast Parkway, I-4 Connector"	647	834	999	1,229	1,460	2.1
Pasco	Suncoast Parkway	194	281	345	465	562	2.7
Hernando	Suncoast Parkway	45	101	131	173	195	3.7
Okeechobee	Ticket System	20	30	36	40	40	1.7
Indian River	Ticket System	60	90	113	138	160	2.5
Brevard	Beachline East	273	399	476	543	607	2.0
Clay	First Coast Expressway	67	106	141	191	218	3.0
Duval	First Coast Expressway	571	673	779	866	996	1.4
Turnpike Service Area		6,400	8,483	10,528	12,463	14,392	2.0
Total State (67 Counties)		9,747	12,938	15,982	18,801	21,538	2.0
Percent (19 of 67 Counties)		65.7%	65.6%	65.9%	66.3%	66.8%	

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

State and County Population
1990-2035 Forecast

Year	Turnpike Service Area (19 Counties)		Total State (67 Counties)		Percent 19 of 67 Counties
	Population (000)	Average Annual Growth*	Population (000)	Average Annual Growth*	
1990 Census	8,483	—	12,938	—	65.6%
2000 Census	10,528	2.2%	15,982	2.1%	65.9
2010 Census	12,463	2.0	18,801	1.9	66.3
2020 Census	14,392	1.8	21,538	1.7	66.8
2025 Forecast	15,507	1.7	23,139	1.7	67.0
2030 Forecast	16,401	1.7	24,419	1.6	67.2
2035 Forecast	17,130	1.6	25,462	1.5	67.3

Source: U.S. Bureau of the Census and University of Florida, Bureau of Economic and Business Research.
Forecast: BEBR Bulletin 189, April 2021.

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

Comparison of Growth Indices

Index	Number (000)					Average Annual Growth (1980-2020)
	1980	1990	2000	2010	2020	
State Population	9,747	12,938	15,982	18,801	21,538	2.0%
Fuel Consumption (Highway Use)	5,246,579	7,031,708	8,906,286	9,611,976	10,255,101	1.7
Employment	4,026	6,061	7,569	8,141	9,328	2.1
Number of Tourists	20,046	40,970	72,800	82,300	79,338	3.5
Turnpike Traffic (Transactions)	55,463	121,378	379,132	639,426	860,569	7.1

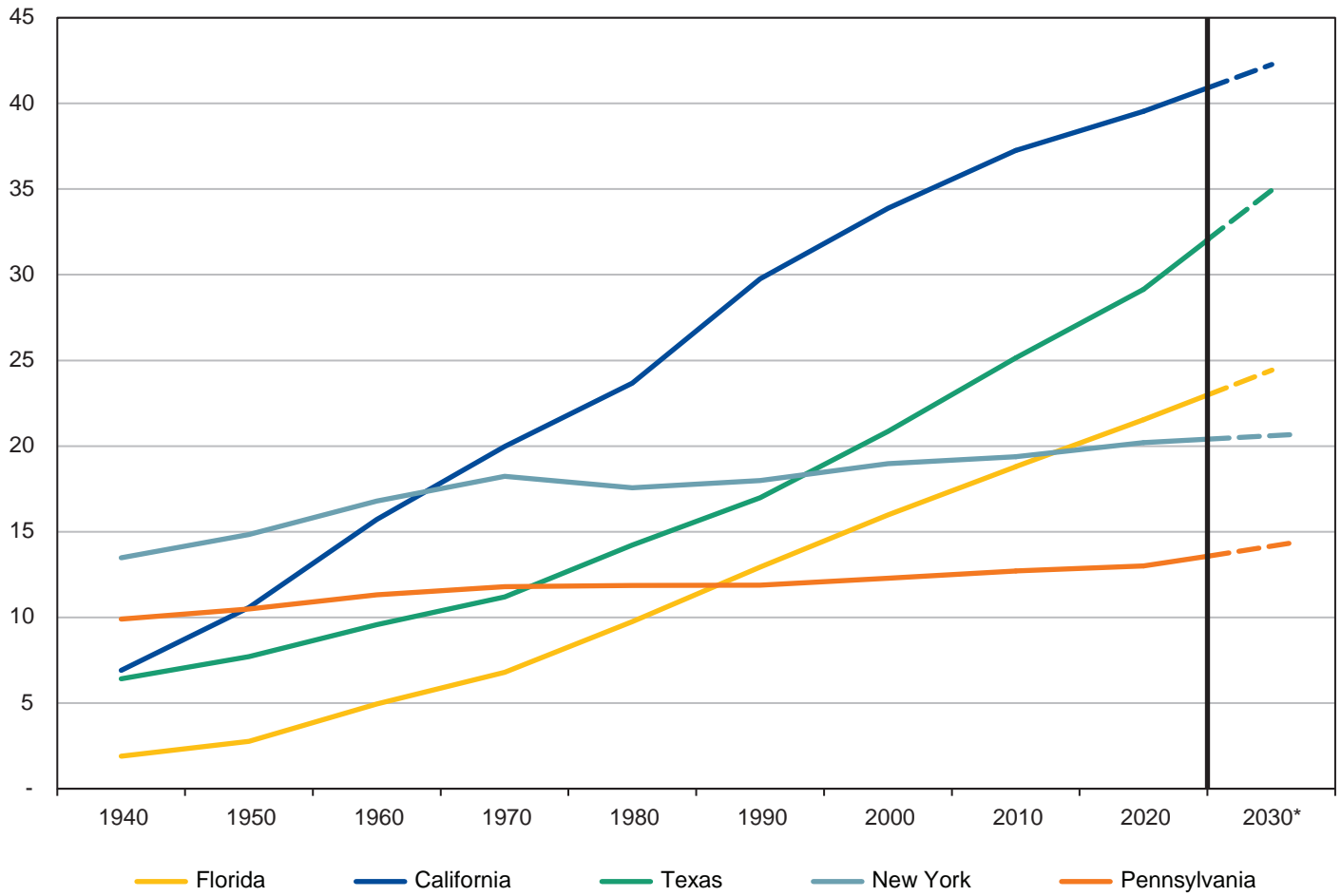
Sources: U.S. Bureau of the Census, University of Florida, Bureau of Economic and Business Research, Florida Commission on Tourism, Visit Florida, Florida Department of Transportation and Florida Research and Economic Database.

Comparison of Home Ownership, Housing Units and Households
Among Five Most Populous States

	Home Ownership Rate ^(*) (Percent)	Total Housing Units (Millions)	Total Households (Millions)
Pennsylvania	68.4%	5.7	5.1
Florida	66.2	9.7	7.9
Texas	61.9	11.3	10.0
California	54.9	14.4	13.2
New York	53.5	8.4	7.4

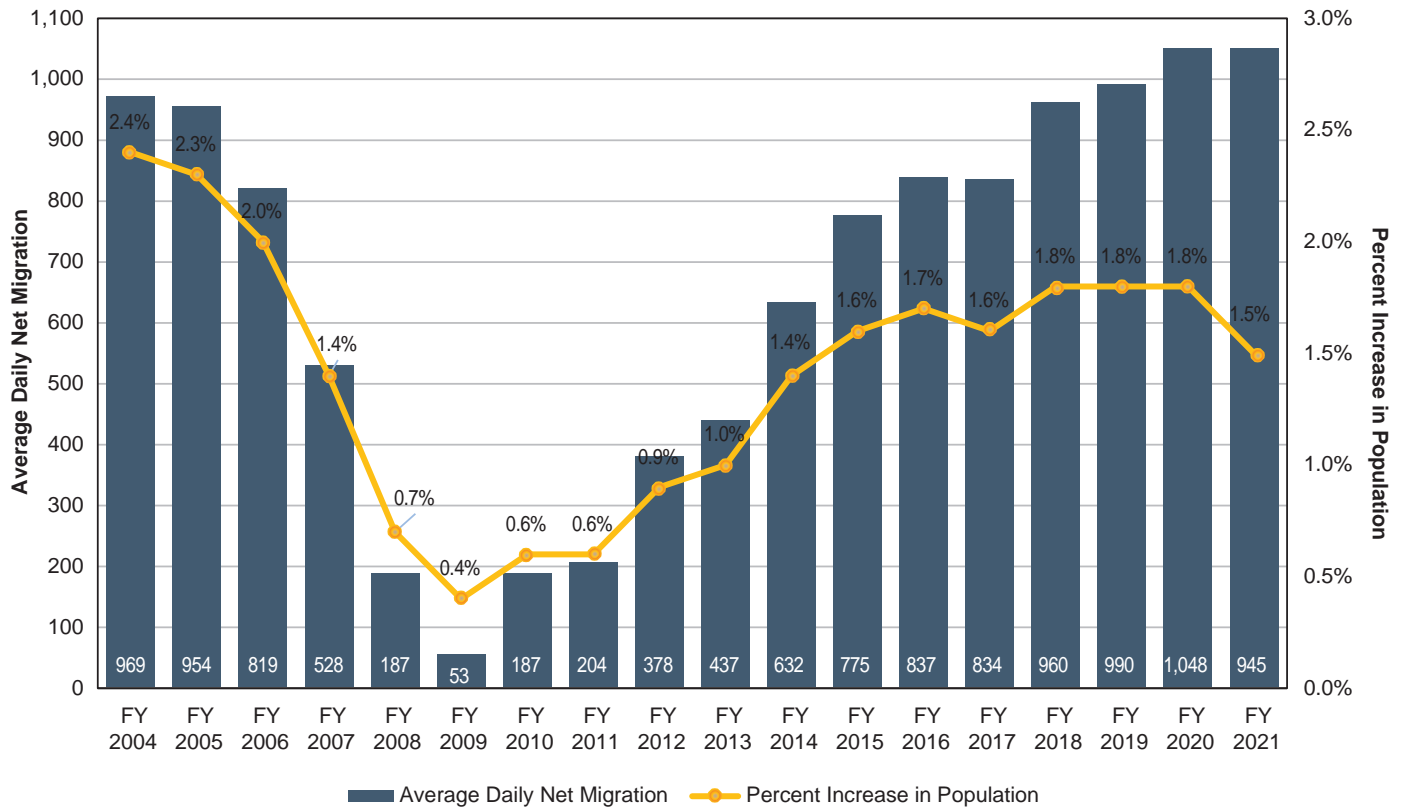
^(*) Reflects percent of occupied housing units that are owner-occupied.
Source: U.S. Census Bureau, American Community Survey 2019

Comparative Population Growth in Five Most Populous States (In millions)



Source: University of Florida, Bureau of Economic and Business Research (BEBR) and individual state websites.
Florida Forecast: BEBR Bulletin 189, April 2021.
* Estimate

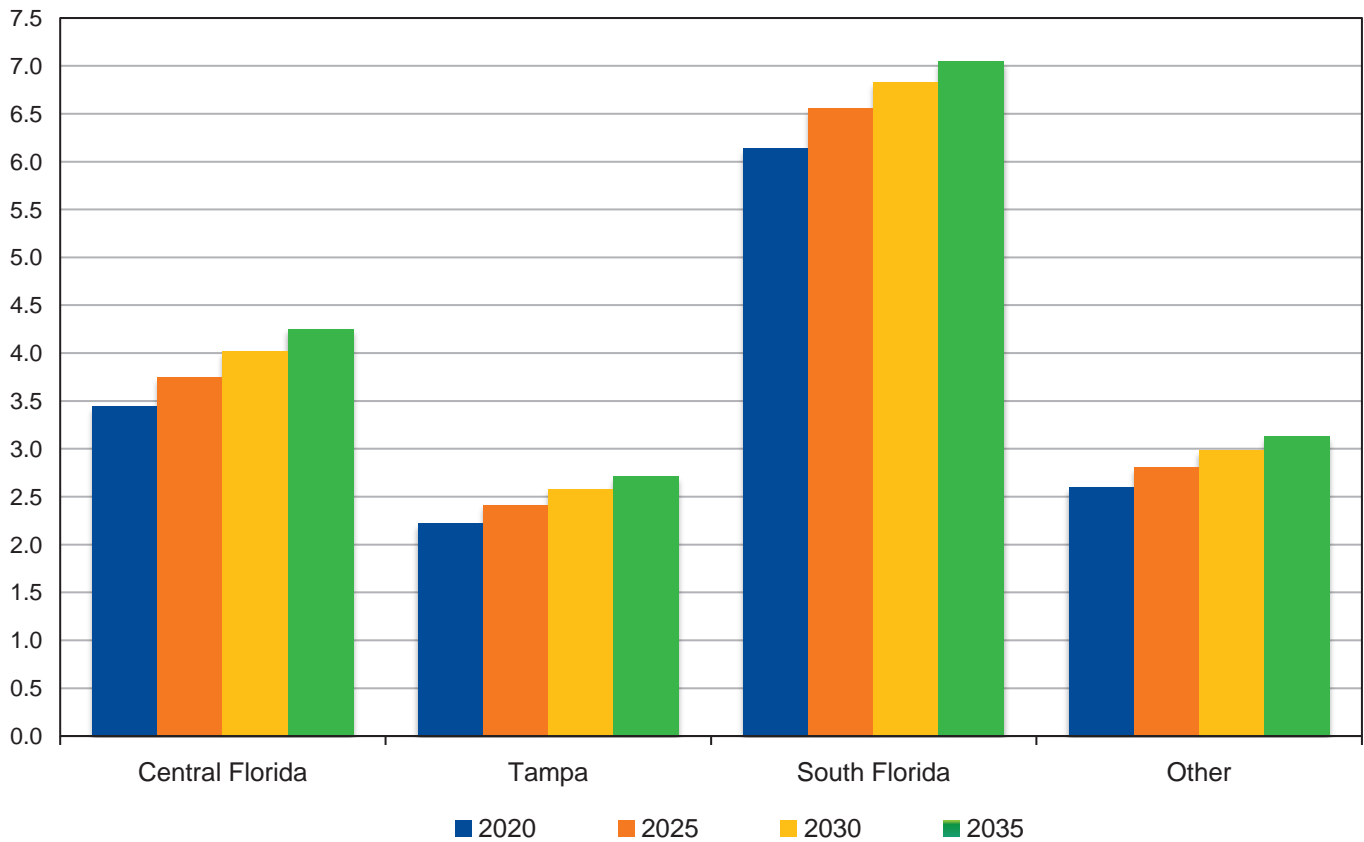
Florida Population Trend



Source: Florida Demographic Estimating Conference March 3, 2021.

Florida’s population is gradually increasing due in large part to strengthening economy. As the graph shows, Florida’s annual population growth reached 1.7 percent in FY 2016 and remained mostly at that level through FY 2020, albeit a significant decline from the levels seen prior to the Recession. Correspondingly, the average daily net migration (excluding deaths and births), which peaked at nearly a thousand residents in 2004, has gradually rebounded to similar levels in recent years.

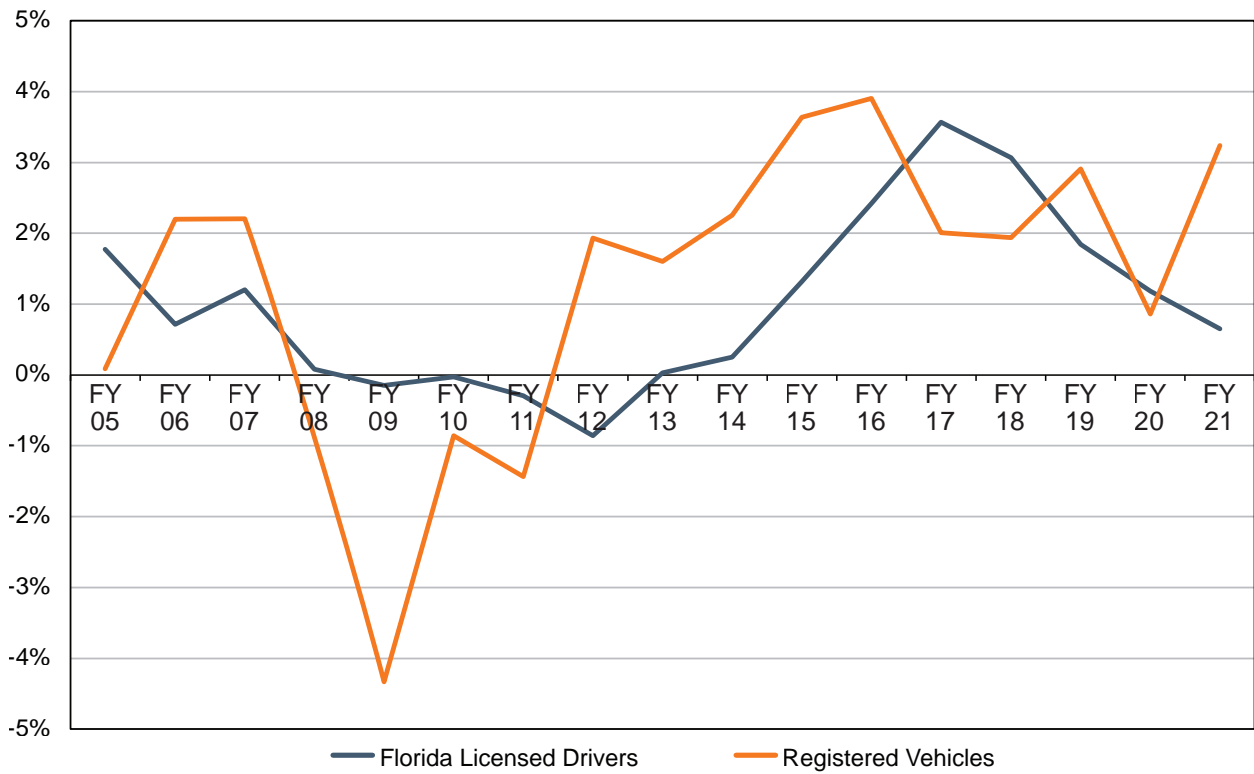
Current and Future Population Estimates of Regions Served By Turnpike (In Millions)



Source: U.S. Bureau of Census and University of Florida, Bureau of Economic and Business Research (BEBR).
Forecast: BEBR Bulletin 189, April 2021.

The state's population is expected to exceed 25 million in 2035. In fact, as the graph depicts, all the population centers that the Turnpike serves are expected to grow. South and Central Florida are expected to add the bulk of the increase with approximately 908 thousand and 806 thousand, respectively, by 2035, followed by the Tampa region with 491 thousand.

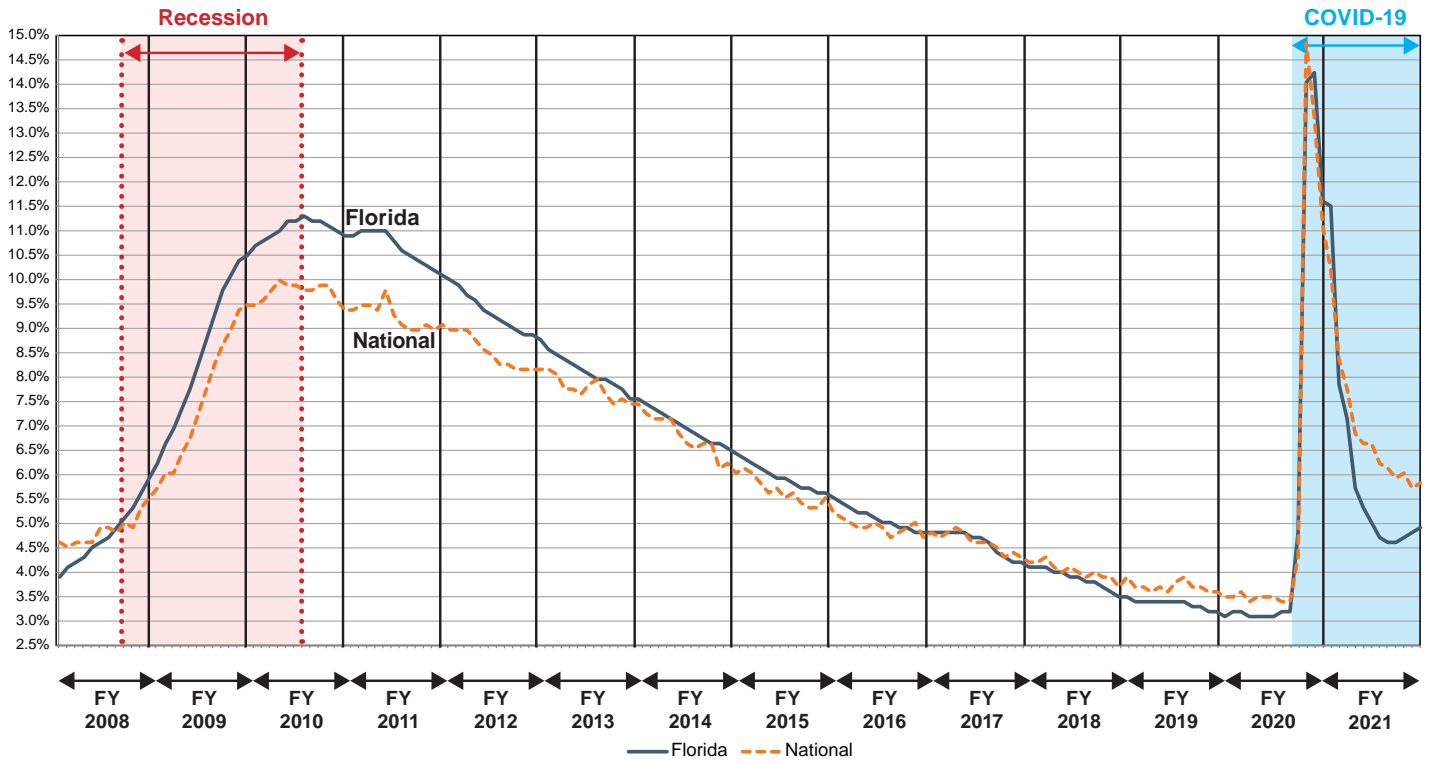
Year-Over-Year Percent Change: Florida Licensed Drivers and Registered Vehicles



Source: Florida Department of Highway Safety and Motor Vehicles.

The population growth has a direct impact on the number of driver's licenses issued and vehicles registered in the state. The year-over-year growth rates of Florida licensed drivers have picked up in recent years after declining during the recession due to slow down in population. Similarly, the growth rate of vehicles registered in the state has picked up starting in FY 2012 after a significant decline during the recession. During FY 2021, licensed drivers in Florida grew nearly one percent to 17.7 million, while registered vehicles increased over three percent to 17.9 million.

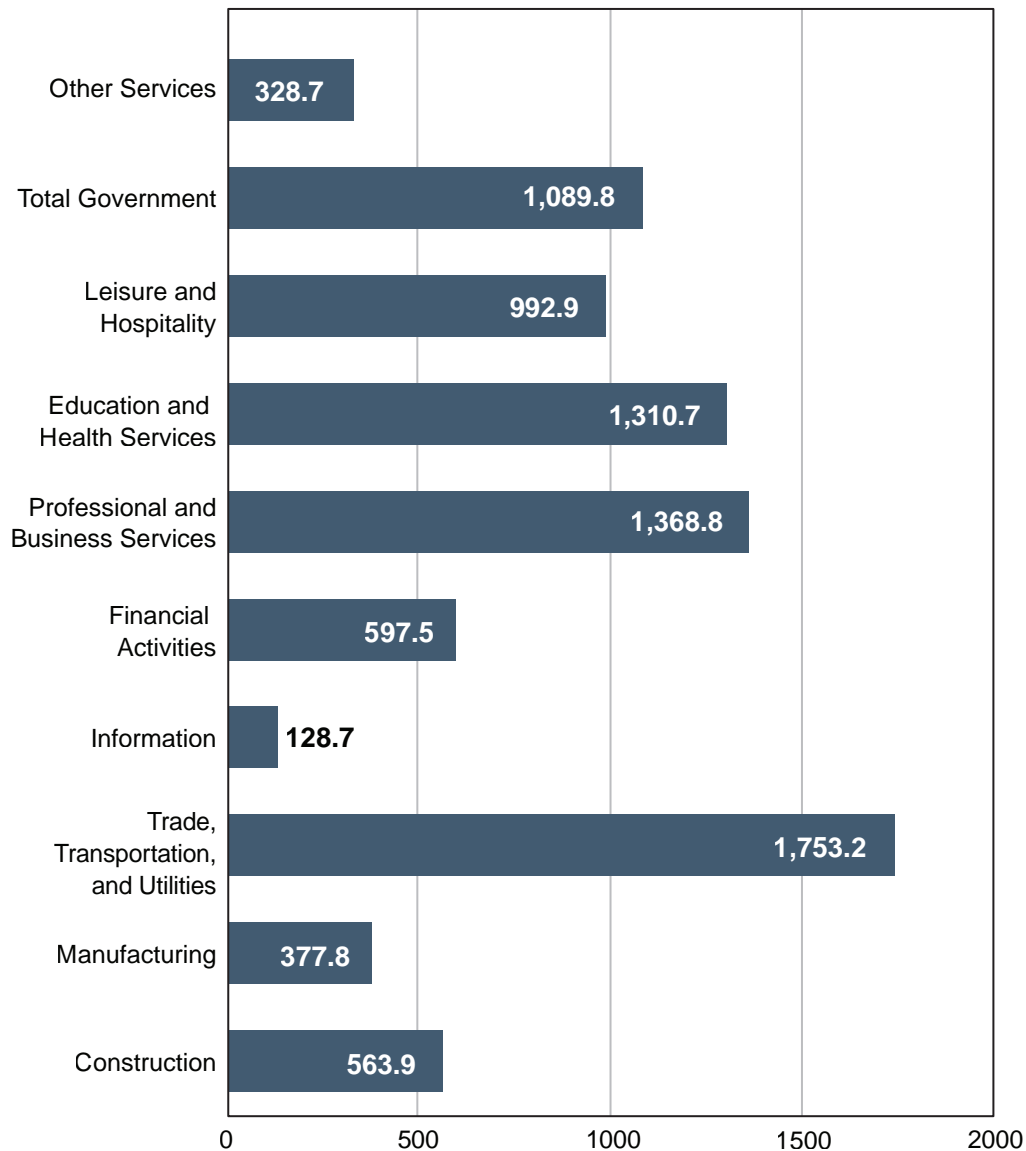
Unemployment Rate



Source: 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 11.3 percent in January 2010, Florida's unemployment rate gradually declined to 3.2 percent in December 2019, lower than the national average of 3.6 percent. Due to the COVID-19 pandemic, unemployment rose dramatically in Florida, peaking at 14.2 percent in May 2020. However, with the reopening of the state, Florida's unemployment continues to diminish with June 2021 unemployment at 5.0 percent.

Non-Agricultural Employment in Florida 2021
(In Thousands)

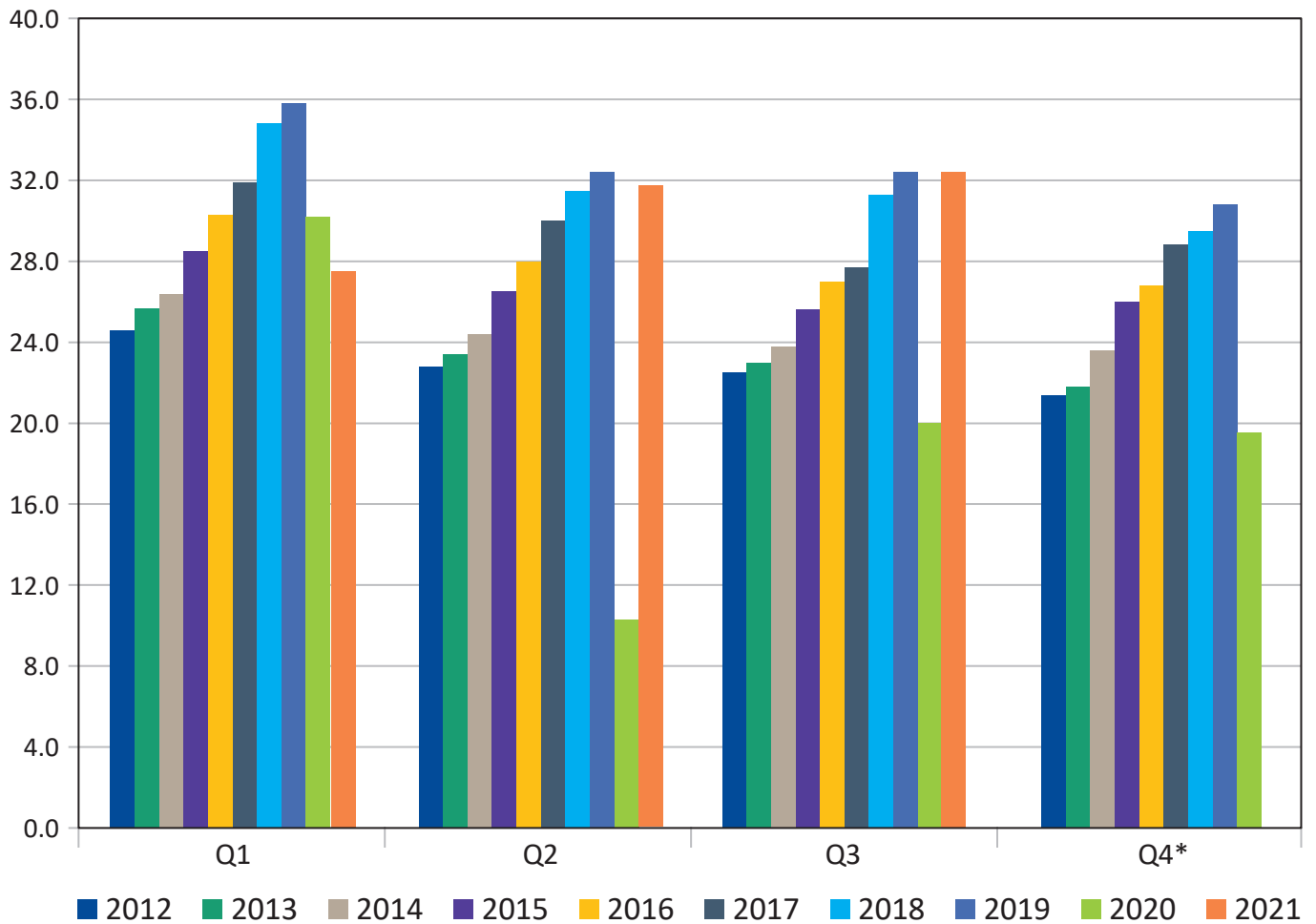


Source: Bureau of Labor Statistics

Florida has a diverse industry base, which to some extent, mitigates the impact from the downturn 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-Agriculture Employment in the state by the North American Industry Classification System (NAICS). In FY 2021, the trade, transportation and utilities industries employed nearly 1.8 million of the workforce and 21 percent of total employment; followed by professional and business services; education and health services; total government; and leisure and hospitality. Most sectors experienced year-over-year decline, most notably in the leisure and hospitality sector with the highest decrease of 14 percent due to the pandemic.

Florida Tourists (in Millions)

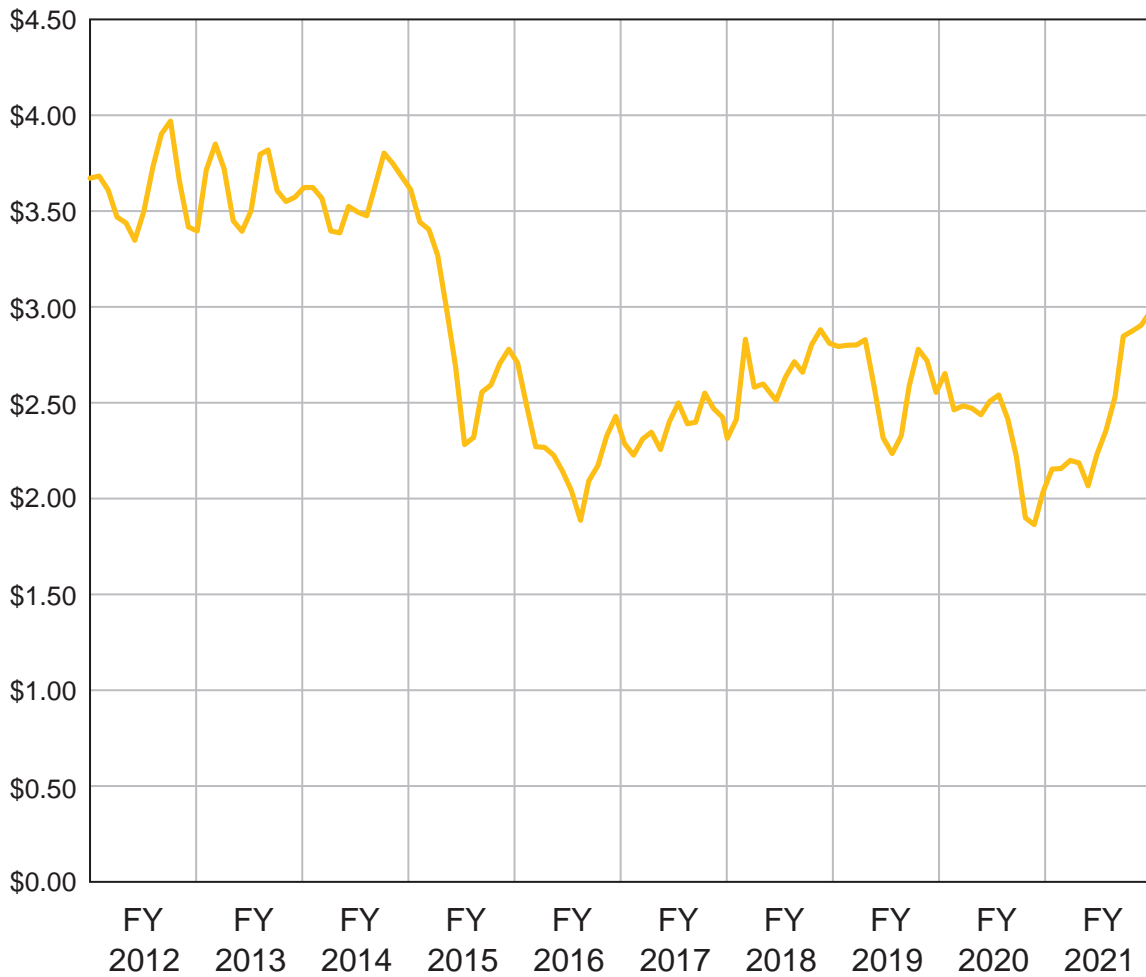


* 2021 data not yet available.

Source: visitflorida.org

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, reflective of the impact of the COVID-19 pandemic. Florida experienced restrictions in travel leading to a notable decline in all four quarters, with recovery starting in the second quarter of 2021 and visitor counts approaching pre-pandemic levels.

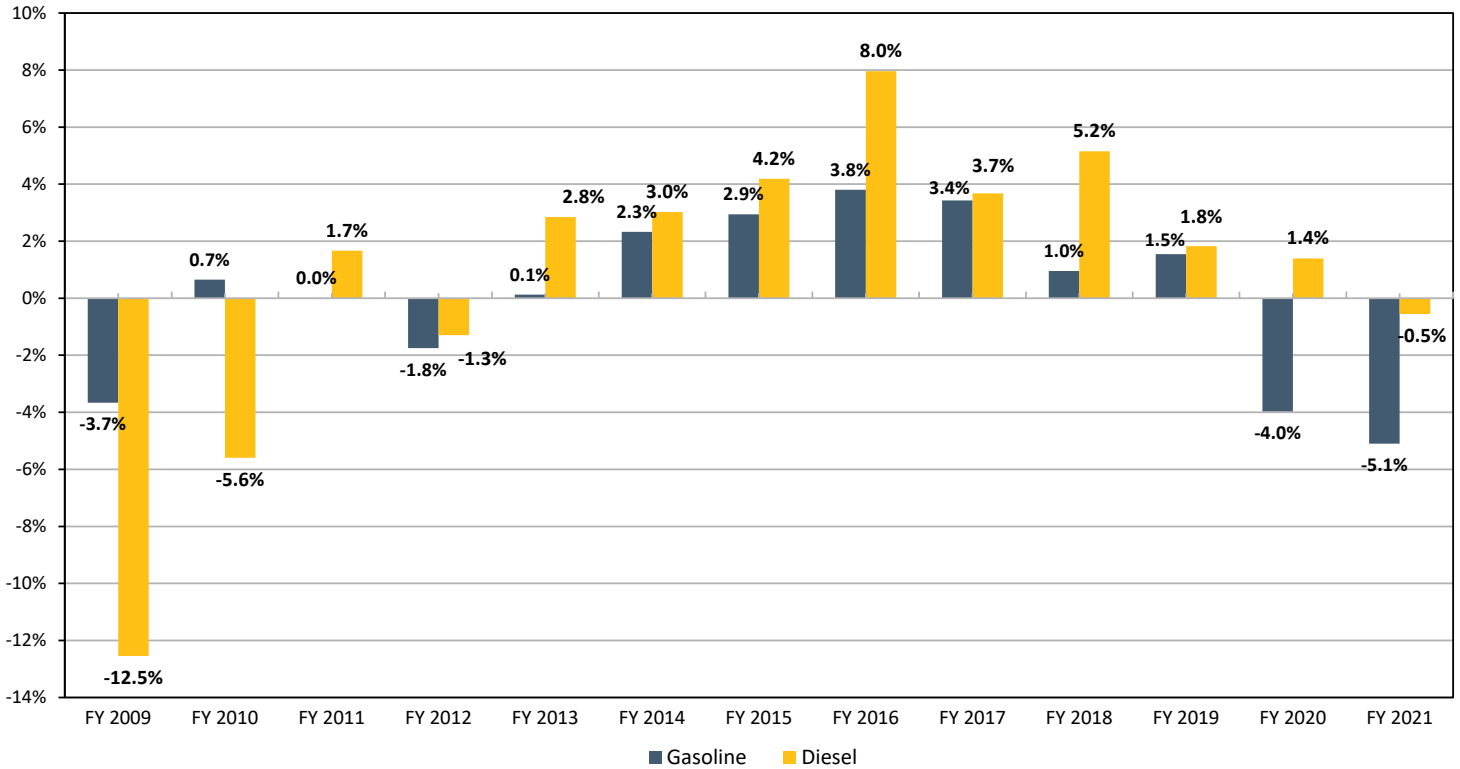
Florida Gasoline Prices (Average of All Grades)



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. Prices per gallon have fluctuated from nearly \$4 to a low of \$1.85. Starting in FY 2015, gas prices show a general downward trend through FY 2020, followed by an upward trend beginning in FY 2021 with \$2.96 per gallon as of June 2021.

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. The consumption rate rebounded starting in FY 2013 and continued through FY 2019. 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 passenger traffic resulting from the COVID-19 pandemic.