

The prospects for increased goods movement through the Tampa Bay region are considered not only for the potential impacts they may have on the transportation system but also for their effects on the regional economy. The freight transportation system is a critical component of the regional economy. Efficient and safe freight mobility supports commercial and industrial growth, job creation, and a high quality of life. The freight transportation system encompasses the trucking industry, maritime shippers and supportive trades, air cargo providers, freight rail carriers, intermodal terminals, warehousing facilities and distribution centers. These activities directly account for over 31,800 basic sector jobs in the region and support additional non-basic sector employment¹.



Investments in freight transportation improvements that reduce the cost of moving goods to and from markets increase and sustain economic growth. Transportation congestion levels and site accessibility are key site location considerations as they affect an area's business costs, market, and overall competitiveness for attracting large-scale business investments. To capture its share of future economic opportunities, it is important for the Tampa Bay region to integrate county and regional economic development plans with transportation and comprehensive plans.

The success of airports, seaports, and rail intermodal facilities to attract new clients, satisfy existing clients, and remain competitive for world trade is highly dependent on the effectiveness of the local transportation system to serve facilities. A transportation system that provides for efficient freight transport increases the area's business attractions, expansions, retentions, and startups. Implementing policies, strategies, and actions that improve transportation accessibility and provide a seamless conduit between intermodal facilities can stimulate economic growth.

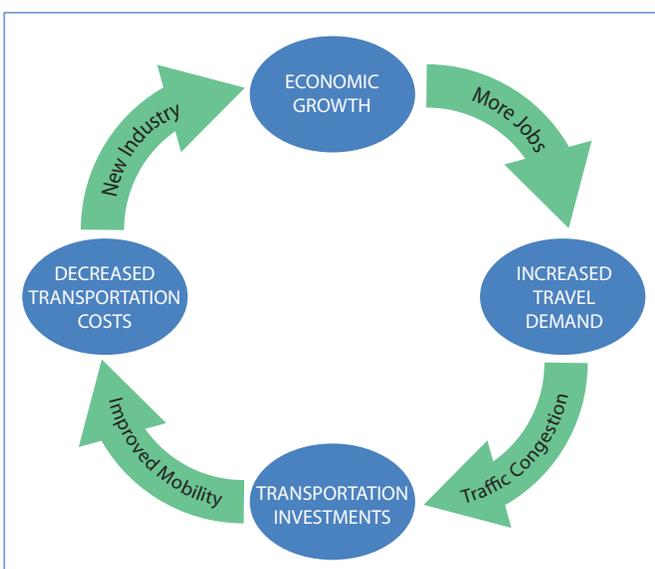


Figure 3-1: Transportation and Economic Growth

The efficient movement of goods throughout the region relies on the integration of freight infrastructure, equipment, personnel, and information systems. All of these components must work together in order to sustain the regional economy. Therefore, the movement of freight, as it relates to economic development, should be considered an important factor when developing annual priorities for transportation improvement projects. **Figure 3-1** shows the relationship between transportation infrastructure and economic growth.

Economic development and transportation are closely linked. Economic development stimulates transportation demand by increasing the number of workers commuting to and from work, customers traveling to and from service areas, and products being transported between produc-

¹ Basic jobs rely on external factors to fuel demand, such as mining and logging jobs. Non-basic jobs rely on local demand and usually employ local workers, such as grocery store and restaurant jobs.

ers and consumers. Additional travel demand triggers the need for investment in the transportation system. Investments that decrease transportation costs, increase safety, and make transportation more reliable may, in turn, stimulate further economic development. A proper economic climate must also exist, as well as other support services. With these factors in place transportation improvements can become catalysts for economic growth.

REGIONAL FREIGHT RELATED EMPLOYMENT

The freight transportation industry is a major employer in the Tampa Bay region. Freight transportation providers, warehouses, and distribution centers directly employ nearly 32,000 people working to expedite the movement of goods to consumers and businesses, as shown in **Table 3-1**. When other freight generating activities including manufacturing, mining, and wholesale trades are included, employment in industries affected by the movement of goods for the eight-county Tampa Bay area reaches over 240,000 workers.

Table 3-1: Freight Transportation Employment in the Tampa Bay Region



The freight transportation industry directly employs nearly 32,000 people in the Tampa Bay region.

COUNTY	TRUCK	WAREHOUSING	WATER	AIR	RAIL	SUPPORT
Citrus	71	22	10*	0	N/A	10*
Hernando	453	750*	0	10*	N/A	52
Hillsborough	4,814	2,191	960	3,750*	N/A	2,615
Manatee	411	750*	N/A	10*	N/A	270
Pasco	482	60*	10*	10*	N/A	108
Pinellas	788	392	60*	375*	N/A	1,048
Polk	5,162	4,821	10*	10*	N/A	521
Sarasota	326	244	10*	66	N/A	176
TOTAL	12,507	9,230	1,060	4,231	N/A	4,800

Source: U.S. Census Bureau, 2009 County Business Patterns

*Median selected from range given by U.S. Census Bureau

Figure 3-2 shows the number of establishments in 2010 in the freight-affected industries of transportation, manufacturing, and wholesale trade for each of the counties in the Tampa Bay area. The chart indicates that in 2010, a total of 10,816 freight-affected establishments were doing business in the region, representing around 19.37% percent of the statewide total.

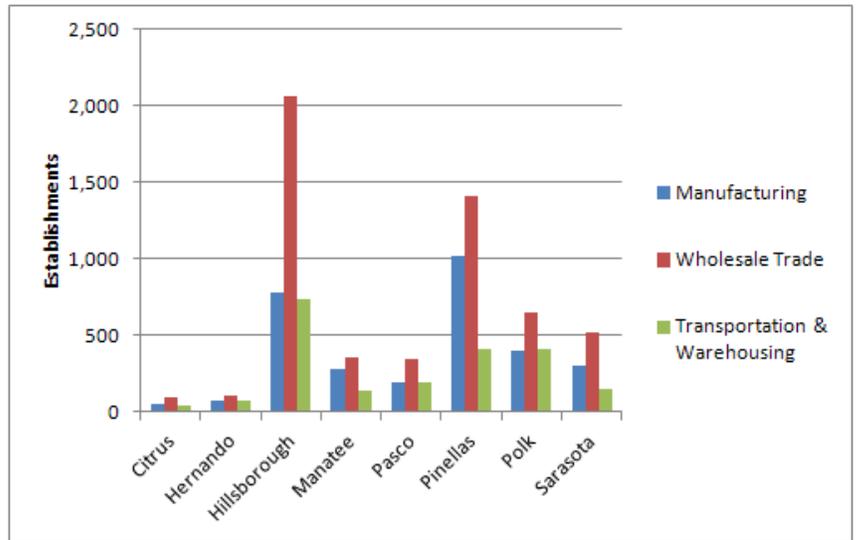


Figure 3-2: Establishments Directly Involved in the Goods Movement Industry

Source: U.S. Census Bureau, 2009 County Business Patterns

Figure 3-3 depicts the total number of employees within each of the three freight-affected industries for each of the counties. In 2010, a total of 243,882 employees worked in industries affected by the movement of goods in the region.

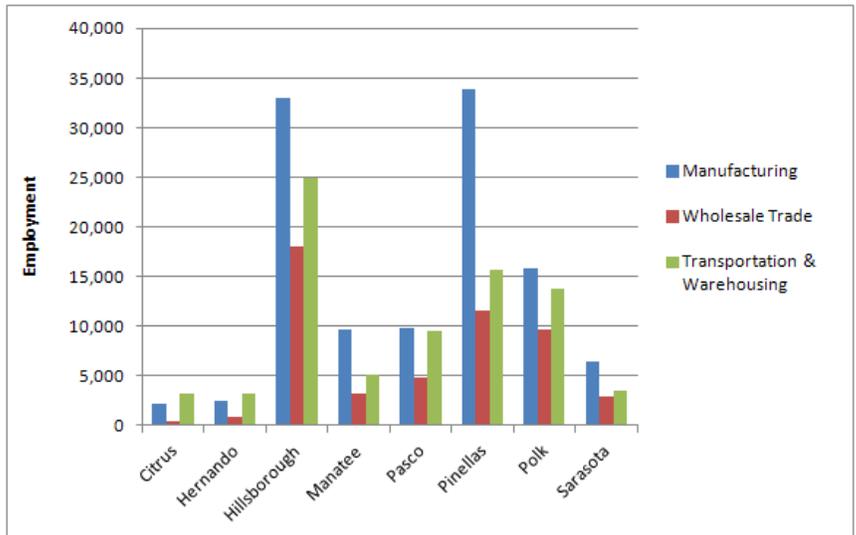
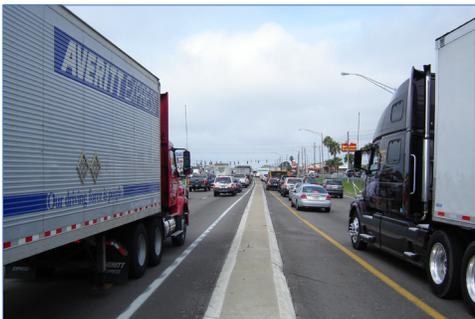


Figure 3-3: Direct Employment Affected by the Goods Movement Industry

Source: U.S. Census Bureau, 2010 American Community Survey

Figure 3-4 shows the annual payroll of the freight-affected industries for each county of the Tampa Bay area. The total payroll across all three freight-affected industries amounted to around \$7.7 billion in 2009.

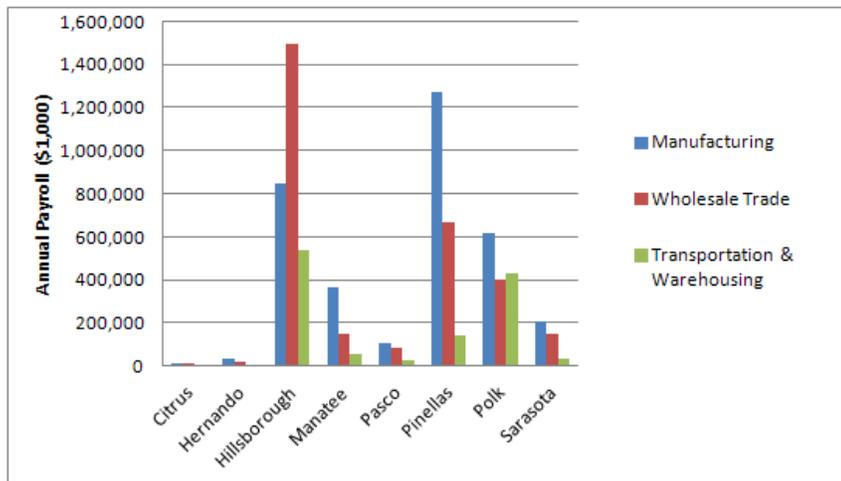


Figure 3-4: Annual Payroll Affected by the Goods Movement Industry

Source: U.S. Census Bureau, 2010 American Community Survey

The region’s economic health is directly related to the efficiency of the regional freight transportation network. An accessible freight network produces economic stability by reducing transportation costs and allowing industries to concentrate on investments in infrastructure and operations. The ability to move goods and improve access to new markets is crucial to industry retention and development in the Tampa Bay region.