



JACKSONVILLE
TRANSPORTATION
AUTHORITY

Major Transit Development Plan Update

EXECUTIVE SUMMARY

May 2025





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The Jacksonville Transportation Authority (JTA) is the public transit authority that serves Duval County, Clay County, and Nassau County, Florida. As of 2024, JTA also provides services that connect Jacksonville with hubs in Baker, Alachua, and St. Johns counties. This Transit Development Plan (TDP) major update is mandated by federal and state statutes to serve as a comprehensive self-evaluation of the agency's existing services relative to its mission, values, goals, and objectives and the practices and performance of peer agencies. The TDP outlines JTA's strategies to improve its services with consideration for changing demographics, economic conditions, and technological landscapes, and to align with other plans for the Northeast Florida region between 2024 and 2034.

Baseline Conditions

As a foundation for analysis and planning, this plan surveys baseline population and employment data, land use conditions, and travel patterns in the JTA service area. The analysis examines recent trends in the demographic characteristics of Duval, Clay, and Nassau counties, with special emphasis given to populations with a higher propensity to use transit. These include low-income persons, youth and elderly, persons with a disability, and those without access to an automobile. A spatial analysis of these demographic indicators, complimented by an examination of future land use changes and regional travel flows, identifies locations where transit is most likely to be successful.

Population and Employment

Projections for future population and employment allow transportation agencies to make informed decisions about changes to service. Growth projections indicate where new or additional transit services may be needed. According to the Bureau of Economic and Business Research (BEBR) at the University of Florida, the population of the state of Florida has grown continuously between 2012 and 2022, with slow but persisting growth in the past five years. While the impacts of the COVID-19 pandemic make future projections uncertain, additional growth is still forecasted.

In 2022, Duval County had a population of 1.03 million, Clay County had a population of 225,553, and Nassau County had a population of 95,809. Low growth population projections suggest that Nassau County would grow by 4%, while Duval County and Clay County would decrease by 5% and 3%, respectively. However, medium growth population projections for each county suggest that Duval County could have 1.3 million residents, Clay County could have 277,700 residents, and Nassau County could have 136,900 residents by 2050. In this scenario, the JTA service area would see an increase of over 350,000 new residents, with the majority of those living in the City of Jacksonville. This scenario and a high growth population scenario would both require significant investment in public transit infrastructure and services, for which JTA can begin to prepare.

Understanding employment trends also helps JTA assess opportunities for improved transit service. Between 2019 and 2024, unemployment rates in Duval County, Clay County, and Nassau County generally followed statewide trends. Unemployment spiked in the spring of 2020 due to the Covid-19 pandemic, and then gradually declined over the next several years, dropping below pre-pandemic levels in the spring of 2022. In February of 2024, the unemployment rates in Duval, Clay, and Nassau counties were between 3.1% and 3.4%. These rates are similar to the statewide unemployment rate.

Transit Access

Transit planning plays a critical role in ensuring that all communities, including those that have experienced historical underinvestment, have access to reliable transportation options. Many neighborhoods have faced economic challenges due to past policies and limited infrastructure investment, leading to reduced mobility and fewer opportunities for residents. These disparities have contributed to obstacles in accessing jobs, education, healthcare, and other essential services, impacting economic mobility and overall quality of life. Data-driven tools now enable planners to better assess community needs and prioritize investments that enhance mobility and connectivity. In the JTA service area, a significant portion of the population faces transportation-related challenges, including infrastructure gaps, limited transit reliability, and health considerations linked to accessibility. One of the most widespread concerns is the impact of land use and development on community well-being, further emphasizing the need for strategic transit planning. By identifying these challenges and developing targeted solutions, transit planners can strengthen economic opportunities, improve transportation access, and foster long-term community growth. Enhanced transit services create stronger connections between residents and critical resources, ensuring a more inclusive and sustainable future for all.

Transit Potential

The agency used population and employment density data and demographic factors to spatially analyze the JTA service area. The results of this analysis indicate which parts of the three counties would likely benefit the most from transit service improvements. For example, those living and working in denser areas are more likely to use transit because their destinations are closer and more convenient to access on foot, bicycle, or via public transit. Duval County has a higher population and employment density compared to Clay and Nassau counties, especially in Downtown Jacksonville and other urban neighborhoods. These neighborhoods are also where population projections indicate the most significant future development in Duval County. In Clay County, projected growth is expected in areas that will be served by the First Coast Expressway project now under construction.

Transit Need

Certain demographic indicators, such as race and ethnicity, age, income, vehicle ownership, and disability status, also influence the demand for transit. Low-income households, non-white individuals, youth and elderly, and those with no or limited access to an automobile are more likely to rely on public transit. These demographic groups are used to determine the Transit-Oriented Population index, which identifies areas with higher concentrations of these demographic groups. An analysis of this index helps determine which areas throughout the service area have a greater need for transit.

Generally, the urban areas of Duval County and Clay County score highest on the Transit-Oriented Population Index, while more rural areas score lower. Fernandina Beach has the highest concentration of transit-oriented populations in Nassau County.

Land Use and Growth Characteristics

Existing and future land use can support or detract from the effectiveness and suitability of transit services. Land use patterns are a significant factor for determining which types of transit service are most appropriate. JTA therefore designs transit services with consideration for the surrounding land use to effectively serve the population relying on transit. All three counties are planning for an increase in residential development, and Duval and Clay counties are planning for increases in mixed-use development. This growth will bring additional transit riders and potentially impact travel patterns across the JTA service area.

Existing Transit and Service Evaluation

JTA profiled each existing bus route and transit service according to performance metrics designed to measure the effectiveness of transit service. This information allows the agency to recommend service improvements. JTA currently operates fixed-route and on-demand transit services in Duval, Clay, and Nassau counties, as well as the Skyway people mover in downtown Jacksonville, St. Johns River Ferry, paratransit services, ReadiRide microtransit, and Gameday Xpress service for major sporting events. Four of the fixed bus routes, the First Coast Flyers, offer rapid transit options into Downtown Jacksonville.

Fixed-Route Bus Transit

JTA operates 30 fixed-route services. Local service is designed to provide transportation to destinations such as grocery stores, shopping centers, medical facilities, parks, recreation centers, and commercial and government services buildings. The First Coast Flyer bus rapid transit (BRT) service and Express Select commuter services are designed to provide limited-stop transportation to primary activity centers along heavily trafficked corridors. While the commuter service operates on a limited schedule concurrent with the typical 9-to-5 workday, BRT operates with higher frequency and longer spans than local bus service. In Clay County, four Clay Flex bus lines offer deviated fixed-route service, with the option for riders to request a flexible pick-up location for an extra fee.

Fixed-route services offered by JTA perform slightly worse in total number of passenger trips than agency peers with similar service area characteristics. The COVID-19 pandemic had significant impacts on transit productivity, including a 50 percent reduction in passenger trips and miles over the last five years. In the same time period, vehicle miles, revenue miles, and revenue hours all declined by about 15-20 percent as well, with most routes consistently performing below agency standards. Fixed-route services offered by JTA serve slightly fewer total passenger trips than agency peers with similar service area characteristics. In response to these trends, JTA is considering strategies to improve efficiency and operational performance and strengthen its services.

Other Transit Services

The JTA service area includes three counties with relatively low population density, making it difficult to serve the entire region with fixed-route transit. To supplement fixed-route bus service, JTA offers several other transit options throughout the region. In downtown Jacksonville, the elevated Skyway people mover connects the urban core with free and frequent automated service. Introduced in 2018, JTA's ReadiRide service offers affordable, on-demand transportation in fourteen zones across the service area, connecting riders to activity centers and fixed-route transit. The St. Johns River Ferry continues to provide passage for automobiles, bicyclists, and pedestrians between Mayport and Fort George Island every 30 minutes. JTA's other bus services include Gameday Xpress, which offers direct service to TIAA Bank Field from fan lots during major sporting events, and paratransit service in both Duval and Clay counties.

With its Ultimate Urban Circulator (U²C) program, JTA is using autonomous vehicles (AV) to improve efficiency and innovation. The U²C will extend Skyway service through the Bay Street Innovation Corridor (BSIC) and nearby neighborhoods. Planned U²C phases include extending corridors to serve additional Jacksonville neighborhoods, particularly those that are experiencing growth and redevelopment.

JTA also partners with other transit providers to offer additional transit options. In response to the 2020 Covid-19 pandemic, JTA expanded its Door-To-Store partnership with the City of Jacksonville to increase access to grocery stores for residents living in food deserts. The agency partners with Beach Buggy to provide on-demand service to Jacksonville Beaches areas to accommodate demands associated with recreational tourism. Together with Go Tuk'n, JTA operates the Tuk'n Ride door-to-door microtransit shuttle service in Downtown Jacksonville, LaVilla, Brooklyn, Riverside, Avondale, and Murray Hill.

Finally, to expand beyond existing services and provide innovative multimodal transportation options, JTA continues to advance its vision for the integration and adoption of new mobility solutions. From the deployment of autonomous vehicles to the use of artificial intelligence and data analytics, to the growing concerns around risk management and cybersecurity, JTA aims to leverage technology and smart, data-driven decisions that will be responsive to the future.

Capital and Infrastructure

In support of its fixed and non-fixed route services, JTA operates more than 2,300 bus stops, hubs, and Park-n-Ride Lots. JTA's Transit Hubs function as major regional transfer facilities where several different services make stops. Transit Hubs provide vehicle and bicycle parking facilities for riders to use JTA's Express Select, First Coast Flyer, and Clay Community Transportation routes. At the Jacksonville Regional Transportation Center (JRTC) at LaVilla, riders are served by additional ticketing and customer service staff. Meanwhile, Park-n-Ride Lots accommodate regional commuters by providing centralized locations for vehicle parking for those transferring to express bus services or the Skyway. In addition to traditional transit infrastructure, the JTA is responsible for the infrastructure for the St. Johns River Ferry and U2C. Through projects like the Emerald Trail, Complete Streets, Creating Safe Spaces, the JTA is improving infrastructure to support safety and multimodal transportation.

Public Involvement

The public engagement strategy for the Transit Development Plan (TDP) incorporated a comprehensive approach to gathering community input, utilizing both in-person and virtual engagement methods to ensure broad participation. In-person outreach included public meetings, pop-up events at key transit locations, and presentations to key stakeholders in the community allowing direct interaction with residents, transit riders, and stakeholders. Additionally, virtual engagement was facilitated through the PublicInput tool, enabling online surveys and interactive maps to expand accessibility and reach a wider audience. The recommendations were presented to key stakeholders, including the North Florida Transportation Planning Organization's (TPO) Technical Advisory Committee (TAC), Citizens Advisory Committee (CAC), and Board of Directors. Additionally, outreach extended to community-based organizations such as the Citizens Planning Advisory Committees (CPACs). This blended approach ensured diverse community perspectives were captured, providing valuable insights to guide the development of the recommendations identified in the TDP.

Situational Appraisal

For this TDP, JTA reviewed state, regional, and local plans, policies, and governmental actions affecting transit service in the JTA service area. An awareness and consideration of external policy decisions is a significant role for transit planners because these policies shape the demand for and functionality of transit services. The agency also reviewed socioeconomic and land use trends within the service area, as these are also entwined with transit use and effectiveness. Through this review, JTA inventoried regional initiatives and trends which align with JTA's mission and core values. Broadly, these initiatives include greater mobility, accessibility, and safety in transit, as well as additional investment in innovative transportation solutions, community engagement, and transit-supportive infrastructure and land use.

Goals and Objectives

The goals for this TDP describe the aspirations for the strategic direction of JTA in alignment with the Mobility Optimization through Vision and Excellence 2023-2027 (MOVE2027) Plan, JTA's most recent strategic plan, the agency's primary mission through 2027. This TDP's goals include:

- Public Transit Expansion
- Infrastructure Upgrades
- Technology Integration
- Transit-Oriented Development
- Mobility Innovation,
- Multi-Modal Connectivity, and
- Community Engagement

The recommendations in this TDP are guided by these principles, offering an expansive vision for transit in Northeast Florida over a ten-year horizon. To direct service planning efforts, the agency developed actionable principles for improving transit service, including:



Performance Improvements: Make transit convenient by providing 30-minute weekday service on fixed routes where feasible.



Crosstown Connectivity: Increase crosstown connectivity and expand emphasis on hubs.



Align with Travel Patterns: Realign routes to match all travel patterns, not just existing transit trips.



Mode Rightsizing: Adjust service type (BRT, bus, microtransit) to match land use.



Feed First Coast Flyer: Prioritize transfers to First Coast Flyers to extend transit coverage and connect to regional destinations.

JTA will ensure that these goals are met by tracking progress with key performance indicators (KPIs).

Service Framework and 10-Year Transit Plan

JTA was guided by the aforementioned agency mission and strategic goals to create a long-term vision for transit service. These goals were translated into targeted analyses that were used to form the specific recommendations of this TDP.

Recommendation Development Process

Recommendations to improve JTA's fixed-route network were developed through a process of detailed route-level and service-level performance evaluation, peer review, public outreach and stakeholder engagement, and workshops with JTA employees. This holistic review identified opportunities to improve performance on existing routes, expand on high-performing routes and services, and implement new transit services. Along with the agency and TDP goals, these opportunities were used to guide long-term concepts for the future of the system.

During the service planning process, JTA staff considered how well each fixed route serves populations that are more likely to rely on transit, as well as the level of economic opportunity that can be accessed from each route. A travel flows assessment, anonymized and synthesized travel behavior data, was developed to compare the route's existing alignment to how people in the region are actually traveling. In addition to route- and stop-level evaluation, the Comprehensive Operational Analysis details how well routes perform in each JTA service type.

A Microtransit Suitability Analysis was also developed to determine areas which are best suited for ReadiRide services. Microtransit suitability is an important consideration for planning transit services that complement one another, as JTA seeks to provide comprehensive transit service to neighborhoods regardless of their level of demand for fixed-route bus service. This analysis used activity-based travel patterns to study trips taken by those who are more likely to rely on transit, trips taken in low-density neighborhoods, and trips that are shorter or less direct than typical transit trips.

Long-Term System Concepts

In the 10-year TDP horizon period, regional transportation improvements and continued evolution of transportation technology will further change the landscape of transportation in the JTA service area. This TDP envisions a range of long-term concepts for JTA which are based on the outcomes determined during the service planning analyses and workshops. Guiding strategies for improved transit service include:

- Developing a ReadiRide mobile scheduling application and introducing dynamic scheduling
- Extending First Coast Flyer BRT routes
- Introducing an oceanfront shuttle for Fernandina Beach
- Continued studies and investments in commuter rail
- Continued transformation of the Skyway, especially with autonomous vehicles
- Forming a vanpool program
- Continued improvement of the St. Johns River Ferry
- Developing addition fire- and last-mile transit services

Service Improvement Recommendations

This TDP presents visionary recommendations for service improvements according to the TDP's goals and planning principles as gathered through public consultation and in close coordination with JTA staff. The 2034 future year scenario is based on 2034 population and employment data and includes all planned and proposed changes to the fixed-route transit system to be implemented between 2024 and 2034. These changes include:

- Increased First Coast Flyer service
- 30-minute service on weekdays for all fixed routes where feasible
- Additional peak headway increases for prominent local routes during peak hours and on weekdays
- Alignment changes to prioritize regional and crosstown connections, including transfers to BRT
- Runtime adjustments to routes in need of On-Time Performance improvements
- Relocation of downtown terminus for Express Select routes from Bay S to JRTC Kiss & Ride
- Additional mid-route recovery time to longer routes in need of On-Time Performance improvements
- Improved accessibility for Spanish-speaking customers, including additional announcements in Spanish

Future Network Evaluation

Future year recommendations for JTA's transit network were evaluated against the existing system for ridership, population and employment capture, revenue miles, revenue hours, average speed, average headway, and operating cost. According to these estimates from Transit Boardings and Estimation Simulation Tool (TBEST) modeling software, annual ridership in the visionary system will increase from 5.6 million in 2024 to more than 8.1 million in 2034. Annual revenue miles are also estimates to increase from 10.5 million miles in 2024 to more than 17.0 million miles in 2034. This evaluation also applies to ReadiRide services, which are forecasted to increase significantly from 2024 to 2034 due to population growth, additional ReadiRide zones, and a new ReadiRide application. Over time, the totality of recommended service improvements of the 10-year transit plan reflects a steady increase in resources for all the service classes, while the share of resources remains the same.

Implementation and Financial Plan

The realization of JTA's future 10-Year Transit Plan requires the phased implementation of all proposed service improvements and new services between 2024 and 2034. The implementation plan outlined in this TDP provides a constrained phasing schedule with short-term, medium-term, and long-term horizons. The improvement phasing considers both operational costs and ridership potential, ensuring changes are made as resources are available while also prioritizing the improvements that most benefit riders. The TDP also recommends that related transit improvements are made concurrently to avoid lapses in transit service during periods of change.

Consistent with the service improvements, technology investments, administrative goals, and other objectives defined in this plan, this TDP includes an Action Plan containing all items to be implemented and monitored moving forward. As the agency responsible for these action items, JTA will manage and report progress on these objectives in future TDP Annual Updates.