

Appendix E Florida Air Cargo Trucking Activity Survey

Introduction

Firms supporting air cargo activities throughout the State of Florida were surveyed in order to quantify several key metrics such as roadway congestion, peak travel times, and airport utilization. In total, of the more than 700 businesses were surveyed. Of these businesses surveyed, 53 carriers, or eight percent, responded which is considered a valid sample size. A summary of the questionnaire results follows.

Type of Operation

Among the reporting firms, the leading type of business activity is Freight Forwarding. Nearly 60 percent of all firms returning a survey cited this as their primary function. In the “Other” category, comprising 13 percent of the responses, three firms named warehouse-related activities as the primary operation. All-cargo carrier activity was the primary business type for 11 percent of all survey respondents. The remaining 17 percent of firms reported their primary business type as LTL Carrier, Customs Broker, Truckload Carrier, or Integrated Express Carrier. **Table 1E** below provides the type of operation and associated percent of total survey responses.

**Table 1E
Type of Operation**

Type of Operation	Percent of Total
Freight Forwarder	59%
Other/Name	13%
All-cargo Carrier	11%
LTL Carrier	7%
Customs Broker	5%
Truckload Carrier	3%
Integrated Express Carrier	2%

Source: Wilbur Smith Associates

Primary Airport Used For Air Cargo Services

Survey responses were collected from surface transport firms associated with two airports: Miami International and Orlando International (see **Table 2E**). For this survey question, 93 percent of responding firms indicated that their operation utilizes Miami International Airport.

**Table 2E
Airport Supported**

Airport	Percent of Total
Miami International	93%
Orlando International	7%
Total	100%

Source: Wilbur Smith Associates

Ranking of Most Critical Business Issues

The third question on the Air Cargo Activity Survey asked surface transport firms to rank the most critical issues impacting business operations. The choices provided are listed below:

- Cargo Security Issues
- Highway Traffic Congestion
- Poor Road Conditions
- Airport Access (roadways, parking, etc.)
- Fuel Prices
- Labor Costs
- On-airport Space Availability
- Availability/Cost of Lift
- Air Traffic Delays
- Other

The leading issue identified as critical to impacting business operations is Fuel Prices. In total, 43 percent of responding businesses ranked this as the most critical item impacting operations. Roadway congestion-related Issues accounted for 24 percent of the total responses and sixteen percent of firms reported Cargo Security Issues as the most critical items impacting business operations. **Table 3E** below provides the survey results for each business issue.

Table 3E
Most Critical Business Operations Issue

Issue	Percent of Total
Fuel Prices	43%
Congestion-related Issues	24%
Cargo Security Issues	16%
Labor Costs	9%
On-airport Space Availability	2%
Availability/Cost of Lift	2%
Air Traffic Delays	2%
Other	2%
Total	100%

Source: Wilbur Smith Associates

Warehouse Location: On-airport or Off-airport

Surface transport firms were asked to provide the type of warehouse or freight processing facility they use to support air cargo operations. As shown in **Table 4E**, 90 percent of responding firms use off-airport facilities.

Table 4E
Warehouse Location

Warehouse Type	Percent of Total
Off-Airport	90%
On-Airport	10%
Total	100%

Source: Wilbur Smith Associates

Off-Airport Warehouse Distances to Airports

Question five of the Air Cargo Activity Survey asked firms with off-airport warehouse facilities to provide the distance in miles to the closest airport. On average, these facilities are located five miles from the Airport they utilize.

Ownership/Operation of Trucks Used For Moving Air Cargo

Firms were asked to provide the type of ownership/operation of the trucks used to move air cargo to-and-from the airport. Some reporting firms operate more than one type of truck operation. Hence, the percentages related to each do not total 100. The three ownership categories and associated percentages are listed below:

- Wholly Owned/Leased and Operated (69%)
- 3rd Party LTL Carrier (68%)
- 3rd Party Truckload Carrier (50%)

Contracted 3rd Party Carrier Use Patterns

The majority of responding firms do not use contracted 3rd party carriers.¹ In fact, only 37 percent of firms use 3rd party carriers to regularly pickup or deliver air cargo directly to-and-from customer locations.

Contracted Truck Activity

On average, firms operate or contract three trucks to-and-from the Airport on a daily basis.

Challenges Facing Drivers

Question nine of the Air Cargo Activity Survey asked the following:

When approaching or departing the Airport, are you aware of any specific challenges your drivers face, for instance traffic congestion, intersections where there are frequent accidents or near misses, routes through congested areas or places where it is difficult for a truck to maintain the flow of traffic, truck restrictions?

¹ A 3rd party logistics provider is a firm that provides outsourced logistics services to companies for their supply chain management functions.

Table 5E below provides the issues causing operations delays on or near the Miami International and Orlando International Airports. Congestion is the leading issue reported, affecting 76 percent of all responding firms. Accidents rank second with nine percent of the total. Delays caused by Traffic Signals and Cargo-related activities each contribute to four percent of the total issues reported.

**Table 5E
Issues Causing Delays**

Issue	Percent of Total
Congestion	76%
Accidents	9%
Traffic Signal	4%
Cargo-related	4%
Lost	2%
Lane Changes	2%
Construction	2%
Total	100%

Source: Wilbur Smith Associates

The average delay time for firms with congestion issues is 38 minutes. Accidents cause average delays of 45 minutes and road construction produces average delays of 25 minutes. The most frequent responses related to intersections producing road congestion in Miami are listed below.

- 25th Street and 72nd Avenue (Miami)
- 36th Street and 72nd Avenue (Miami)
- 25th Street and Expressway 826 (Miami)

In Orlando, Beeline I-4 Turnpike was cited as a location for accidents producing delays.

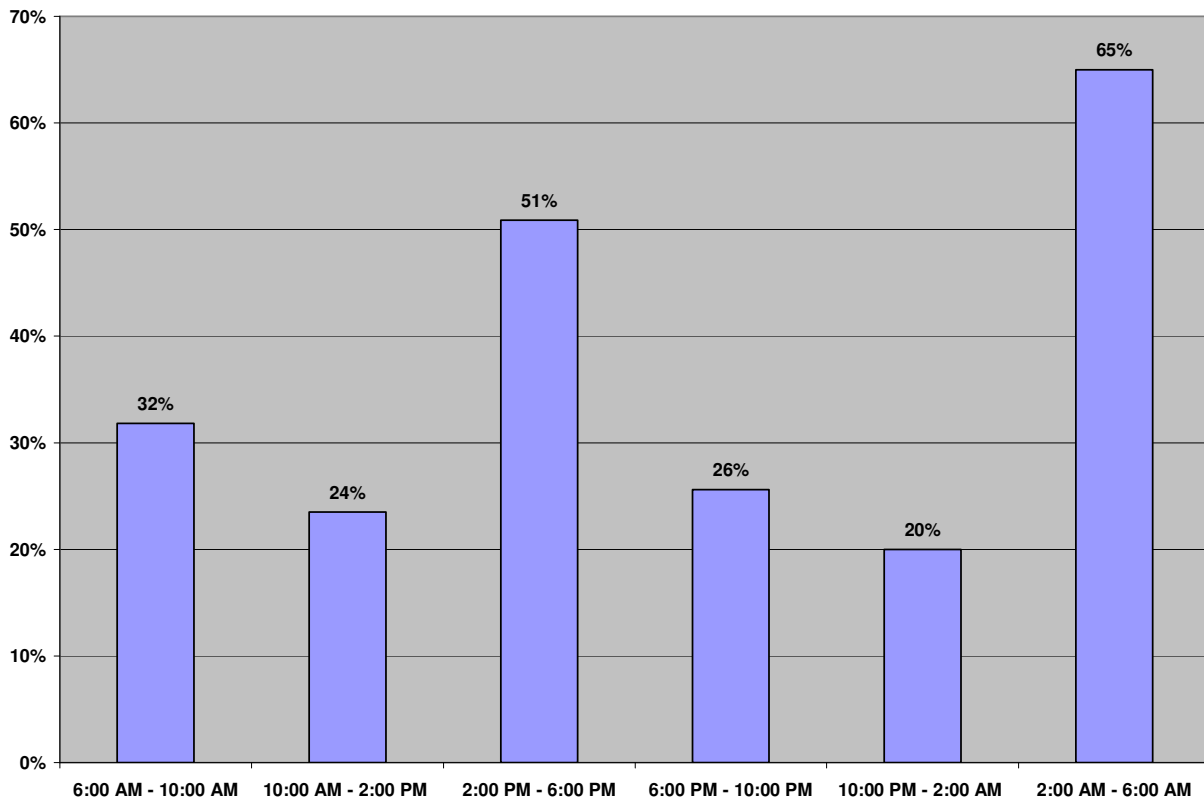
Alternate Route Use

Based on the issues identified in Question Nine, firms were asked if any of these identified items cause drivers to take an alternate or more circuitous route to-and-from the airport. The majority of reporting firms indicate that the issues identified do not force their drivers to take alternate or more circuitous routings (59 percent). The remaining responses, 41 percent of the total, indicate that drivers do use alternate or more circuitous routings as a result of the business issues identified in Question Nine above.

Peak Hours of Operation

To conclude, surface transport firms were surveyed regarding their peak hours of operation in terms of the percent of total daily truck trips to-and-from the Airports they support. **Exhibit 1E** provides the six time categories (in four hour increments) and the associated average percent of total daily truck trips occurring during each. Survey data indicates peak travel time for freight forwarding is 2:00 AM to 6:00 AM.

Exhibit 1E
Average Percent of Total Daily Truck Trips To-and-From Airports



Source: Wilbur Smith Associates