Agenda

• Welcome
• Recap of Last Meeting
• Guest Speakers
  – Port Canaveral, Jim Dubea
  – Space Florida, Mark Bontrager
  – SRD, Robert Neil
• Study Activities
• Next Steps & Discussion
Discussed the purpose and objectives of the Visitor Study

Discussed the FAST Act and the National Advisory Committee on Travel and Tourism Infrastructure

Reviewed Study Activities
  – Data Dictionary
  – Global Visitor and Attraction Review
  – Retail Visitor Survey
  – Visitor Data and Corridor Analysis
  – Economic Analysis
James Dubea is the Deputy Executive Director of Government and Strategic Partnerships. He is a veteran of the United States Coast Guard with 22 years of service, retiring in 2012 as the Commanding Officer of Coast Guard Base, Port Canaveral.

A licensed Merchant Mariner, Mr. Dubea holds a Bachelors Degree in Information Technology Management and a MBA in Strategic Leadership from Trident University.
Port Canaveral

2nd Busiest multi-day cruise port in the world serving more than four million passengers per year

7 dedicated terminals serving 4 home ported cruise lines, port-of-call visits and casino cruises
Mark Bontrager is the Vice President for Spaceport Operations at Space Florida. Bontrager has more than 21 years of experience with the United States Air Force and most recently served as a Colonel and Commander of the 45th Mission Support Group at Patrick Air Force Base and Cape Canaveral Air Force Station.

Mark Bontrager holds a B.S. in Computer Engineering from the University of Florida, a Master’s of Engineering from the University of Colorado at Boulder, a Masters in National Security Studies from the Naval War College, and a Masters in Airpower Art and Science from the School of Advanced Airpower Studies at Maxwell AFB in Alabama.
UNFORGETTABLE MOMENTS ARE GO FOR LAUNCH IN FLORIDA.

Make space part of your epic Florida vacation.
Learn how at WeAreGoFL.com.
Global Visitor and Attraction Review
London
The Big Smoke

DID YOU KNOW?

• London’s buses were not always red – before 1907, different routes had different colored buses
• In 1949, a flock of starlings perched on the Big Ben minute hand slowing it down by 4.5 minutes
• The actual City of London is only 1.12 square miles
London, United Kingdom

2014 Statistics

City Population: 8.5 Million
Total Visitors: 28.8 Million
Visitor Spending: $32.3 Billion
Peak Season: July – September

London, United Kingdom

2014 Visitor Profile

- **Leisure Travelers:** 12.2 Million
- **Business Travelers:** 3.3 Million
- **Domestic Visitors:** 11.4 Million
- **International Visitors:** 17.4 Million
- **Average Length of Overseas Stay:** 6.2 Days

Transportation Options for Visitors

- London Underground (the Tube)
- Docklands Light Rail
- London Overground Bus
- Barclay’s Cycle Hire Scheme
- Emirates Air Line Cable Car
- London River Service Boat

Source: Visit London
London, United Kingdom

Transportation & Tourism Collaborations

**Marketing Partnerships**

London & Partners is the official promotional organization for the City of London.

**Funding Partnerships**

Transport for London is funded by transit fares, congestion charge income and grant funding from the Department for Transport and the Greater London Authority.

“No other city is as defined by its transportation system as London, with its red buses, black cabs and Tube trains.” – Transport for London
Las Vegas
Sin City

DID YOU KNOW?

- Home to the third largest convention center in the United States
- Almost half of the total workforce is supported by tourism
- The Las Vegas Monorail is responsible for eliminating 25 million vehicle miles on the City’s roadways
Las Vegas, Nevada

2015 Statistics

- **MSA Population:** 2.1 Million
- **Total Visitors:** 42.3 Million
- **Peak Season:** Based on special events

**Location Map**

**Popular Attractions**

- Las Vegas Strip
- Red Rock Canyon National Conservation Area
- Fremont Street Experience
- Mob Museum

*All tourism statistics for the Metro Las Vegas Area*
Las Vegas, Nevada

2015 Visitor Profile

Leisure Travelers: 77%

Business Travelers: 16%

Domestic Visitors: 84%

International Visitors: 16%

Average Length of Stay: 4.4 Days

Origin of Visitors

Western States
Other Countries
Southern States
Midwestern States

Source: 2015 Las Vegas Visitor Profile Study
*All tourism statistics for the Metro Las Vegas Area
Las Vegas, Nevada

Transportation Options for Visitors

- Taxi
- Bus
- Shuttle
- Rental Car
- Monorail
- Bike Share

Transportation Arrival Mode

43% Air
57% Ground Transportation
Las Vegas, Nevada

Transportation & Tourism Collaborations

Marketing Partnerships

R&R Partners is the official advertising and marketing communications agency for LVCVA.

Funding Partnerships

Investment from Cox Nevada Telcom for telecommunications services for the convention centers and other various buildings to the LVCVA.

Innovative Transportation Project

The Las Vegas Monorail provides significant reductions in vehicle miles and emissions from the Southern Nevada community.
## City Comparisons Index

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>Total International Visitors per Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Vancouver</td>
<td>6.2</td>
</tr>
<tr>
<td>2</td>
<td>Dubai</td>
<td>5.7</td>
</tr>
<tr>
<td>3</td>
<td>San Francisco</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>Orlando (MSA)</td>
<td>4.3</td>
</tr>
<tr>
<td>5</td>
<td>San Diego</td>
<td>4.3</td>
</tr>
<tr>
<td>6</td>
<td>Toronto</td>
<td>4.3</td>
</tr>
<tr>
<td>7</td>
<td>Barcelona</td>
<td>4.1</td>
</tr>
<tr>
<td>8</td>
<td>Las Vegas (MSA)</td>
<td>3.2</td>
</tr>
<tr>
<td>9</td>
<td>Washington D.C.</td>
<td>2.8</td>
</tr>
<tr>
<td>10</td>
<td>Singapore</td>
<td>2.8</td>
</tr>
</tbody>
</table>

Source: Individual City Reports
## City Comparisons Index

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>Total Annual Visitors* per Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Washington D.C.</td>
<td>31.3</td>
</tr>
<tr>
<td>2</td>
<td>San Francisco</td>
<td>28.4</td>
</tr>
<tr>
<td>3</td>
<td>Orlando (MSA)</td>
<td>27.5</td>
</tr>
<tr>
<td>4</td>
<td>New Orleans</td>
<td>24.8</td>
</tr>
<tr>
<td>5</td>
<td>San Diego</td>
<td>24.1</td>
</tr>
<tr>
<td>6</td>
<td>Las Vegas (MSA)</td>
<td>20.1</td>
</tr>
<tr>
<td>7</td>
<td>Chicago</td>
<td>18.6</td>
</tr>
<tr>
<td>8</td>
<td>Toronto</td>
<td>16.0</td>
</tr>
<tr>
<td>9</td>
<td>Vancouver</td>
<td>14.7</td>
</tr>
<tr>
<td>10</td>
<td>Los Angeles</td>
<td>11.5</td>
</tr>
</tbody>
</table>

*Includes international, domestic, and “staycation” trips.*

Source: Individual City Reports
## City Comparisons Index

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>Annual Tourist Spending per Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>New Orleans</td>
<td>$17,720</td>
</tr>
<tr>
<td>2</td>
<td>San Francisco</td>
<td>$10,754</td>
</tr>
<tr>
<td>3</td>
<td>Hawaii</td>
<td>$10,643</td>
</tr>
<tr>
<td>4</td>
<td>Washington D.C.</td>
<td>$10,423</td>
</tr>
<tr>
<td>5</td>
<td>Orlando (MSA)</td>
<td>$9,083</td>
</tr>
<tr>
<td>6</td>
<td>Barcelona</td>
<td>$8,663</td>
</tr>
<tr>
<td>7</td>
<td>San Diego</td>
<td>$6,571</td>
</tr>
<tr>
<td>8</td>
<td>Hong Kong</td>
<td>$5,890</td>
</tr>
<tr>
<td>9</td>
<td>Vancouver</td>
<td>$5,687</td>
</tr>
<tr>
<td>10</td>
<td>Chicago</td>
<td>$5,222</td>
</tr>
</tbody>
</table>

Source: Individual City Reports
## City Comparisons Index

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>Transit Ridership per Person in the Area*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hawaii</td>
<td>178.3</td>
</tr>
<tr>
<td>2</td>
<td>Paris (MSA)</td>
<td>133.3</td>
</tr>
<tr>
<td>3</td>
<td>London</td>
<td>107</td>
</tr>
<tr>
<td>4</td>
<td>Rome</td>
<td>84.4</td>
</tr>
<tr>
<td>5</td>
<td>Barcelona</td>
<td>58.6</td>
</tr>
<tr>
<td>6</td>
<td>New York City</td>
<td>54.8</td>
</tr>
<tr>
<td>7</td>
<td>Hong Kong</td>
<td>25.6</td>
</tr>
<tr>
<td>8</td>
<td>Vancouver</td>
<td>23.5</td>
</tr>
<tr>
<td>9</td>
<td>San Diego</td>
<td>22</td>
</tr>
<tr>
<td>20</td>
<td>Orlando (MSA)</td>
<td>0.4</td>
</tr>
</tbody>
</table>

* Includes total residents and visitors in the city per year

Source: Individual City Reports
Lessons Learned

**Transportation & Tourism Collaboration Opportunities**

- Cooperative data collection efforts
  - Sharing data
  - Reduced data collection costs

- Proactive involvement of tourism agencies in planning/design processes
  - FDOT – long term design view
  - Tourism Agencies – rapid responses to an ever-growing industry

- Visitor Information Mobile Application
  - Distribute real-time travel updates
  - Encourage public transit

“Understanding the travel patterns and trip characteristics of tourists can serve both the marketing emphasis of tourism organizations and the research needs of transportation agencies.”

Sources: NCHRP 329 – Integrating Tourism and Recreation Travel with Transportation Planning and Project Delivery, NCHRP 419 – Tourism Travel and Transportation System Development
Lessons Learned

Convenience of Seamless Trips

✔ Direct transit connections to tourist destinations and business convention centers
✔ Easily navigated transfers between transportation modes
✔ Complete Streets

Public/Private Partnership Examples

Disney Magical Express
Orlando International Airport & DisneyWorld

Disneyland Express
Los Angeles Metro & DisneyLand

Tokyo Metro Stop @ Tokyo Disney
Metro transfer station at Tokyo Disney

Sources: NCHRP 329 – Integrating Tourism and Recreation Travel with Transportation Planning and Project Delivery, NCHRP 419 – Tourism Travel and Transportation System Development
Lessons Learned

Tourist Tax Examples

San Diego
- Transient Occupancy Tax (TOT) (10.5%)

Bangkok
- Auto Rental Tax (7%)

Los Angeles
- Rental Car Surcharge (8.3 %)
- TOT (14%)
  - 1% funds Los Angeles Tourism

Toronto
- Gas Tax for TTC funds – 2 ¢/liter

Cross Industry Collaboration

Hong Kong & Shanghai Hotels own the Peak Tramway – Transports tourists and residents to the upper levels of Hong Kong Island.

Disneyland & the Government – The government though a joint venue company works to improve Hong Kong Disneyland’s operational performance and implement an expansion plan.

TOT = Transient Occupancy Tax (Bed Tax)
MCTD = Metropolitan Commuter Transportation District
Lessons Learned

Tourist Tax Examples

New Orleans
• Hotel Occupancy Tax (13%)
  • 7.7% funds the RTA, 7.7% funds the Convention and Visitors Bureau, and 30.8% the Convention Center

Washington DC
• Hotel Tax (14.5%)
  • 4.45% funds the Convention Center
• Restaurant/Liquor Tax and Rental Vehicle Tax (10%)
  • 1% funds the Convention Center

New York
• Rental Car Surcharge (11% in MCTD, 6% outside MCTD)

Cross Industry Collaboration

San Francisco – Car rental companies are required to pay monthly assessments to the California Travel and Tourism Commission on revenue generated at either airport or hotel rental locations.

The San Francisco Travel Association receives a small portion of its funding from the San Francisco International Airport.

TOT = Transient Occupancy Tax (Bed Tax)  RTA = Regional Transit Authority of New Orleans
MCTD = Metropolitan Commuter Transportation District
Retail Visitor Survey
Retail Visitor Survey

Overview

- Intercept surveys at retail establishments
  - April to July 2017
  - 11 locations
  - Weekday and weekend sampling
Retail Visitor Survey

Approach

- Tablet based survey
- Survey team of 2 people
- Completed in one minute or less
  - Survey team was timed by several visitors
  - Nearby visitors volunteered for the survey when they witnessed the length of the survey
Retail Visitor Survey

Overview

• Typical Questions
  – How did you travel here today (i.e. bus, drive, taxi)?
  – Are you a Florida resident?
  – What brings you to town?
  – Will you be visiting other attractions while in Florida?

Questions prompted based upon previous responses
Retail Visitor Survey

Response Rate

• 460 survey responses
• Response Rate: 30-50%
• Response rate varied by location
  – Beaches: 90%
  – Indoor malls: 20%
Retail Visitor Survey
Findings: Visitor Type

• International Visitors: 20%
  – United Kingdom: 9%
  – Brazil: 3%
  – Canada: 1.5%

• Domestic Visitors: 21%
  – 36 different states

• Florida Resident Visitors: 10%
• Staycation Visitors: 49%
How did you travel here today?

- Drive: 78%
- Uber / Lyft: 8%
- Taxi: 8%
- Bike / Walk: 3%
- Transit (Bus, SunRail, etc.): 3%

Drive Subset:
- Rental Car: 22%
- Personal Vehicle: 78%
What road/route did you take?

- Major Roads, 63%
- Followed GPS instructions, 34%
- Toll Roads, 2%

<table>
<thead>
<tr>
<th>#</th>
<th>Roadway</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I-4</td>
<td>21%</td>
</tr>
<tr>
<td>2</td>
<td>I-95</td>
<td>8%</td>
</tr>
<tr>
<td>3</td>
<td>State Road 44</td>
<td>8%</td>
</tr>
<tr>
<td>4</td>
<td>SR 528</td>
<td>6%</td>
</tr>
<tr>
<td>5</td>
<td>International Drive</td>
<td>6%</td>
</tr>
<tr>
<td>6</td>
<td>Turnpike (SR 91)</td>
<td>5%</td>
</tr>
<tr>
<td>7</td>
<td>SR 200</td>
<td>4%</td>
</tr>
<tr>
<td>8</td>
<td>US 92</td>
<td>4%</td>
</tr>
<tr>
<td>9</td>
<td>I-75</td>
<td>3%</td>
</tr>
<tr>
<td>10</td>
<td>SR A1A</td>
<td>3%</td>
</tr>
</tbody>
</table>
### Where are you staying while you are here?

<table>
<thead>
<tr>
<th>Where are you staying while you are here?</th>
<th>All Visitors</th>
<th>Out of State</th>
<th>Florida Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Domestic Visitors</td>
<td>Int’l Visitors</td>
</tr>
<tr>
<td><strong>My Home</strong></td>
<td>47%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Resort / Hotel</strong></td>
<td>28%</td>
<td>53%</td>
<td>65%</td>
</tr>
<tr>
<td><strong>Friend or Family Member’s Home</strong></td>
<td>2%</td>
<td>7%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Did Not Specify</strong></td>
<td>23%</td>
<td>32%</td>
<td>29%</td>
</tr>
</tbody>
</table>

<sup>1</sup> Florida Residents within study area (10 counties)

<sup>2</sup> Florida Residents outside of study area (57 counties)

<sup>3</sup> Florida Residents outside of study area (57 counties)
### What brings you to town?

<table>
<thead>
<tr>
<th>Are you enjoying a vacation of traveling for work?</th>
<th>All Visitors</th>
<th>Out of State</th>
<th>Florida Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Domestic Visitors</td>
<td>Int’l Visitors</td>
<td>Entire State&lt;sup&gt;1&lt;/sup&gt;</td>
</tr>
<tr>
<td>Leisure</td>
<td>80%</td>
<td>80%</td>
<td>89%</td>
</tr>
<tr>
<td>Business</td>
<td>16%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>7%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Nearly ¼ of total “Other” respondents noted health or medical reasons as their trip purpose.
AirSage Cellular Phone Data

- AirSage Cellular Phone Data
- Origin-Destination Analysis
- Determine % of Visitor Traffic on Roadways
Visitor Modeling

1. **AirSage Data**
2. **District-to-District CFRPM to AirSage Factors Computed**
3. **CFRPM Trip Tables Factored into Resident and Visitor Trip Tables**
4. **Verify/Adjust Special Generator Trips with Local Data**
5. **Resident and Visitor Trips Assigned to CFRPM Network**
Visitor Travel

Daily Average by Zip Code

Source: FDOT RCI, AirSage Data
Percent Visitor Traffic

Identifying primary visitor corridors to better understand transportation network impacts

Source: FDOT RCI, AirSage Data

Percentage of Visitor Traffic Volume from Total Traffic Volume

- 0% - 15%
- 16% - 25%
- 26% - 35%
- 36% - 50%
- 51% - 75%

Data Source: CFRPM
Visitor Traffic by Volume

Identifying primary visitor corridors via AADT to better understand transportation network impacts

Source: FDOT RCI, AirSage Data
AADT and Visitor Percentage

Source: FDOT RCI, AirSage Data
TransVaIu:
Visitor Module
Existing TransValU Modules

Benefit Cost Analysis

Economic Impact Analysis (EIA)

Multimodal & Intermodal Considerations, including O&M
TransValU Visitor Module

• Understand economic impacts on increased visitor spending resulting from transportation investment

• Differentiate benefits
  – Residents
  – Visitors
EIA Visitor Module: Inputs

- Visitor Spending Profile
  - Spending Categories by Industry
- Visitor Trip Volumes
- Visitor Transportation Costs

Customizable Analysis for Scenario Planning

Rendering courtesy of I-4 Mobility Partners
Hypothetical Project Scenario

Input Variables

• Project Details
  – Widen: 4 to 6 Lanes
  – 10 miles in length
  – $200,000,000 total cost

• Study Area
  – District Five + Polk County

• Analysis Period:
  – 20 years following project opening
Hypothetical Project Scenario

Analysis Findings

Project Benefits (BCA)

⏰ Travel Time Savings
  - Residents: $78,807,700
  - 4,021,000 Vehicle Hours
  - Visitors: $31,982,500
  - 1,134,000 Vehicle Hours

🚗 Vehicle Operating Costs
  - Residents: $232,733,600
  - Visitors: $65,642,800

Project Impacts (EIA)

👨‍💼 Jobs Created:
  - 7,820

💰 Earnings Generated:
  - $245 Million

_vertices

💼 Value Added:
  - $474 Million

📊 Business Sales:
  - $806 Million
Planning for Tourism
23 CFR 450.316(b)
In developing metropolitan transportation plans and TIPs, the MPO should consult with agencies and officials responsible for other planning activities within the MPA that are affected by transportation (including State and local planned growth, economic development, tourism, ...)

23 CFR 450.306(b)(10)
The metropolitan transportation planning process shall be continuous, cooperative, and comprehensive, and provide for consideration and implementation of projects, strategies, and services that enhance travel and tourism.
## Planning for Tourism
Integration into the Regional Planning Process

<table>
<thead>
<tr>
<th>Ways to integrate tourism into the regional planning process</th>
<th>CONSULTATION</th>
<th>CONSIDERATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advisory Committee Participation</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>
Study Resources
Florida is a world-class tourist destination with extensive tourism infrastructure developed around its natural and man-made attractions. The key to providing the most efficient transportation infrastructure lies in understanding visitor travel patterns and needs. This understanding is relevant to a variety of policy considerations and has implications on facility planning, design, and operations. Tourism levels may influence policies on funding transportation infrastructure and aligning service investments in an innovative, efficient, and timely manner.

The purpose of the Central Florida Visitor Study Update (Study) is to fully understand visitor travel within the region and recommend ways to best prepare for expected growth. The Study will provide insights into the economic and transportation opportunities for Central Florida.
Discussion
Contact

John Zielinski
FDOT District Five SIS Administrator
133 S. Semoran Boulevard
Orlando, Florida 32807
(407) 482-7868
John.Zielinski@dot.state.fl.us