Why are we here?

- Respond to New FAST Act Requirements
- Enable Data Sharing
- Understand Economic Impacts and Benefits
Introductions
Agenda

• Welcome & Introductions
• Study Purpose & Objectives
• FAST Act: Planning for Tourism
• Status Update and Study Activities
• Next Steps and Upcoming Meetings
Purpose & Objectives
Central Florida Tourism - 2016

• 68 million visitors
• Orlando - #1 in the US
  – Staycations
  – Destination weddings
• Orlando - #2 in FL
  – 42 Million Enplanements
• 75.5% hotel occupancy rate
• $236 million in tourist development tax collections

Source: Visit Orlando and Visit Florida
Tourism Timeline

- Gatorland (1949)
- Magic Kingdom (1971)
- Sea World (1982)
- Epcot (1982)
- Florida Mall (1986)
- Universal Studios (1989)
- Animal Kingdom (1998)
- Islands of Adventure (1999)
- Kennedy Space Center Visitor Complex (1995)

Previous Study 2000

Florida Mall

Gatorland
Visitor Projections

$100 Billion Visitor Spending by 2020
150 Million Visitors by 2030
Are Our Transportation Systems Ready?

Data from 1980 – 2015 and does not include staycation trips
Sources: BEBR, Visit Florida, Florida Chamber of Commerce
Study Objectives

1) Fully understand visitor travel in the region = enhanced planning tools (CFRPM, TransValU)

2) Create visitor economic impact analysis tool to assess future transportation strategies

3) Maximize return on investment for tourist related transportation projects

4) Assist Partners with meeting FAST Act Requirements
Overall Study Plan

1. INFORMATION GATHERING/RESEARCH
2. STUDY DESIGN/METHODOLOGY
3. DATA ANALYSIS
4. TOURISM INDUSTRY REVIEW OF GLOBAL ATTRACTIONS
5. VISITOR ECONOMIC AND REVENUE ANALYSIS TOOL
6. SCENARIO PLANNING
7. RECOMMENDATIONS
8. DOCUMENTATION
So what is your role?

- Provide local perspective
- Ensure Visitor Study meets regional planning needs
- Provide feedback at established milestones
FAST Act: Planning for Tourism
FAST Act Planning Requirements

• 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, natural disaster risk reduction, environmental protection, airport operations, or freight movements) or coordinate its planning process (to the maximum extent practicable) with such planning activities.
FAST Act Planning Requirements

• 23 CFR 450.206(a)(10)
  – Each State shall carry out a continuing, cooperative, and comprehensive statewide transportation planning process that provides for consideration and implementation of projects, strategies, and services that enhance travel and 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.
National Initiative, Local Roles

• National Advisory Committee on Travel and Tourism Infrastructure (NACTTI)
  – 25 Members
    • Appointed by USDOT Secretary
    • 2-year Terms
  – First Meeting took place on December 8-9, 2016
  – Local NACTTI Members:
    • James Dubea, Canaveral Port Authority
    • Mayor Buddy Dyer, City of Orlando

For more details, visit: https://www.transportation.gov/NACTTI
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.
Status Update
Visitor Data Dictionary

Overview

- Identify and inventory visitor data sources
- Serve as a tool for visitor analyses
- Link transportation infrastructure to Florida resident and visitor use

www.CFGIS.org/FDOT-Resources/Central-Florida-Visitor-Study.aspx
Visitor Data Dictionary

Approach

- Good Data = Better Planning and Decision Making
- Aligns with ROADS (Reliable, Organized and Accurate Data Sharing)
- Technology and Innovation = Better Data, Cost Efficiency
- Data Granularity and Accuracy
- Investigate all Available Datasets
- Keep End Goals in Mind – CFRPM, TransValU
Visitor Data Dictionary
Sample of Data Sources
Domestic Visitors to Florida

- **Southeast**: 18%
- **Central**: 35%
- **Central West**: 12%
- **North Central**: 2%
- **Northwest**: 11%
- **Southwest**: 9%
- **North Central**: 2%
- **Central East**: 7%
- **Northeast**: 7%

Source: VisitFlorida 2015
Visitor Data Dictionary

Travel Purposes

Domestic Visitors to Florida

89% of Visitors travel for Leisure

- General Vacation: 37%
- Visit Friends/Relatives: 25%
- Getaway Weekend: 13%
- Special Event: 8%
- Other Leisure/Personal: 7%

11% of Visitors travel for Business

- Convention: 4%
- Seminar/Training: 2%
- Other Group Meetings: 2%
- Short Term Business: 2%

Source: VisitFlorida 2015
Direct International Flights
From Central Florida

*As of August 2017
• Understand how each city:
  – Maximizes return from investments in tourism infrastructure
  – Identify lessons learned that may be applied in Central Florida
Global Destinations

- Honolulu
- Orlando
- New Orleans
- Rio de Janeiro
- Barcelona
- New York
- San Francisco
- Las Vegas
- Los Angeles
- San Diego
- Vancouver
- Toronto
- Chicago
- New York
- Washington DC
- Orlando
- Miami
- London
- Paris
- Rome
- Bangkok
- Hong Kong
- Singapore
- Sydney
- Tokyo
- Toronto
- Vancouver
- San Francisco
- Los Angeles
- San Diego
- Honolulu
- Orlando
- New Orleans
- Rio de Janeiro
- Barcelona
- New York
- Washington DC
- Orlando
- Miami
- London
- Paris
- Rome
- Bangkok
- Hong Kong
- Singapore
- Sydney
- Tokyo
City Comparisons Index

- Visitor/ Population
- Visitor Spending
- Public Transportation
- Transit Ridership
- Innovative Partnerships

52 Visitors per FL Resident in Greater Orlando vs. 3.4 in London (2015)
## 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>Orlando (MSA)</td>
<td>52.8</td>
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<tr>
<td>2</td>
<td>Washington D.C.</td>
<td>31.7</td>
</tr>
<tr>
<td>3</td>
<td>San Francisco</td>
<td>28.4</td>
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<tr>
<td>4</td>
<td>New Orleans</td>
<td>25.8</td>
</tr>
<tr>
<td>5</td>
<td>San Diego</td>
<td>24.1</td>
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<tr>
<td>6</td>
<td>Las Vegas (MSA)</td>
<td>20.1</td>
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<tr>
<td>7</td>
<td>Chicago</td>
<td>18.6</td>
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<tr>
<td>8</td>
<td>Toronto</td>
<td>16.0</td>
</tr>
<tr>
<td>9</td>
<td>Vancouver</td>
<td>15.2</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
Global Review Factoids

**Bangkok, Thailand**

Tuk Tuks are serve as local taxis in the city of Bangkok.

**Rio de Janeiro, Brazil**

Partnered with MOOVIT, a mobile app for public transit, during the 2016 Summer Olympic Games to manage traffic and ridership demand.

*Source: Individual City Reports*
Innovative Partnerships

**Funding Partnerships**

- Dubai – Passed a law to facilitate Public-Private Partnerships (PPP)
- Las Vegas – PPP for the Las Vegas Monorail
- Los Angeles – Disney Land Express

**Marketing Partnerships**

- Barcelona – Metro Walks Program
- New Orleans – Tourism agencies market public transit as an attraction
Retail Visitor Survey

Overview

• Intercept surveys at retail establishments
  – Summer 2017
  – 19 locations
  – 400+ responses

• Analysis In Progress

1. Daytona Beach
2. Volusia Mall
3. Daytona Int'l Speedway
4. New Smyrna Beach
5. Kennedy Space Center
6. Melbourne Square Mall
7. Cocoa Beach
8. Paddock Mall
9. Lake-Sumter Landing
10. Mall at Millenia
11. Orlando International Premium Outlets
12. Universal Studios
13. The Florida Mall
14. Orange County Convention Center
15. International Drive
16. Disney World
17. Sea World
18. Orlando Vineland Premium Outlets
19. LegoLand

Orlando Int'l Airport
Port Canaveral Cruise Port
Retail Visitor Survey

Approach

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

• Supplemental Data for:
  – Mode choice
  – Road/route choice
  – Origin-Destination
Corridor Assignment

- AirSage Cellular Phone Data
- Origin-Destination Analysis
- Determine % of Visitor Traffic on Roadways
OD Trip Table Methodology

Data Sources

• Regional Model (CFRPM) provides TAZ level trip tables
  – Calibrated to regional conditions
  – Provides regionally accepted total numbers of trips
  – Does not distinguish between visitors and residents

• AirSage Data
  – Provides actual regional trip information at a district-to-district level
  – Breaks down trips into several categories including residents and visitors to the region
  – Lack of coverage for international visitors

• Additional Data Sources
  – Provide detail about attendance/trips to specific locations
  – Generally do not have detailed information about trip origins
OD Trip Table Methodology
Preliminary Analysis

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
Percent Visitor Trips

LEGEND

- < 10%
- 11% - 20%
- 21% - 30%
- 31% - 50%
- > 50%

Urban Area
Water Body
County Boundary

DRAFT: Includes in-state and domestic visitors.
Percent Visitor Trips

DRAFT: Includes in-state and domestic visitors.
AADT and Visitor Percentage

Source: FDOT RCI, AirSage Data

Orange County Convention Center
What is TransVaLU?

• Corridor focused economic impact tool for planning level analysis
• User friendly - Excel based
• Analysis at County, MPO, and District levels
• Accounting for all transportation modes
• Part of the statewide economic analysis toolbox

http://www.cfgis.org/FDOT-Resources.aspx
Existing TransValU Modules

- Benefit Cost Analysis
- Economic Impact Analysis (EIA)

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

TransValU Benefit-Cost Analysis Module

Costs
- Capital Costs
- O&M Costs

Benefits
- Travel Time
- Safety
- Emissions
- Economic Development
- Reduced O&M Cost

Outputs
- Net Present Value
- Benefit to Cost Ratio
- Overall Rate of Return
- Discounted Payback Period

INFORMED DECISION-MAKING

MONETIZATION AND DISCOUNTING

Ridership

Monetization and Discounting
TransValU EIA Module

- Business Sales
- Job Creation
- Value Added
- Earnings
- Tax Revenue

Rendering courtesy of I-4 Mobility Partners
Differentiate benefits/costs
- Residents
- Visitors

Understand economic impacts of transportation projects on tourism industry
Next Steps
Next Steps

- Global Review of Tourism Attractions Report
- Assemble, Analyze and Share Data
- Visitor Data Analysis Report
- Create Visitor Economic Impact Tool (TransValU Module)

Future Work:
Scenario Planning & Recommendations
Discussion
Meeting Schedule

• PAG Meeting 2
  – November 30, 2017
  – 10:30 AM to 12:00 PM

• PAG Meeting 3
  – January 30, 2017
  – 10:30 AM to 12:00 PM
Contact

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