Central Florida Visitor Study Update

Central Florida Transportation Planning Group

August 4, 2016
Presentation Outline

• Introduction/Background
• Tourism Factoids
• Data Dictionary
• Questions
## Project Background

- Previous Visitor Study: 2000
- Model Updated with Visitor Data: 2003

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Visitors to Florida</td>
<td>72.8 Million</td>
<td>105 Million</td>
<td>Goal: 115 Million</td>
</tr>
<tr>
<td>Annual Tourist Spending in Florida</td>
<td>$49.95 Billion</td>
<td>$89.1 Billion</td>
<td>---</td>
</tr>
</tbody>
</table>

Source: VisitFlorida and BEBR
Project Objectives

• Fully understand visitor travel in the region = enhanced planning tools (CFRPM, TransValU)
• Create visitor economic and revenue analysis tool to assess future transportation strategies
• Maximize return on investment for tourist related transportation projects
Overall Study Plan

• Task 1 - Information Gathering/Research
• Task 2 - Study Design/Methodology
• Task 3 - Data Analysis
• Task 4 - Tourism Industry Review of Global Attractions
• Task 5 - Visitor Economic and Revenue Analysis Tool
• Task 6 - Scenario Planning
• Task 7 - Recommendations
• Task 8 - Documentation
Tourism Timeline

- Magic Kingdom: 1971
- Sea World: 1986
- Epcot: 1982
- Florida Mall: 1986
- Universal Studios: 1990
- Animal Kingdom: 1998
- Islands of Adventure: 1999
- Kennedy Space Center Visitor Complex: 1995

Previous Study: 2000
Tourism Timeline

- **Holy Land**: 2001
- **LegoLand**: 2010
- **New Fantasyland**: 2012
- **Harry Potter: Diagon Alley**: 2014
- **Port Canaveral Expansion**: 2015
- **Port Canaveral Expansion**: 2016
- **I-Drive 360**: 2015
- **Daytona Rising**: 2016
- **Mall at Millenia**: 2002
- **Port Canaveral Expansion**: 2003
- **Previous Study 2000**
Total Annual Visitors to Florida

120 Million in 2025

Are Our Transportation Systems Ready?

*Data from 1980 – 2014 and does not include staycation trips

Source: BEBR and Florida TaxWatch
Tourism Factoids
Global Tourism – 2014

- 1.1 billion travelers
- $1.2 trillion in spending by travelers
- $1.4 trillion contribution to global GDP

Source: World Travel & Tourism Council
Florida Tourism – 2015

• 105 million visitors
  – Does not include Florida Resident or Temporary Resident trips
• 1.2 million jobs supported by tourism
• $89.1 billion in total spending by visitors
  – $5.3 billion in sales tax collection (23% of total state sales tax revenue)

Source: Individual City Reports and VisitFlorida
Central Florida Tourism - 2015

- > 66 million visitors
- 33 million hotel nights sold
- $230 million in tourist development tax collections
- Orlando - #1 in the US
  - Staycations
  - Destination weddings

Source: Visit Orlando and Visit Florida
International Comparison

Annual Tourists in 2014 (Millions)

- Orlando: 62
- Paris: 32
- Sydney: 31
- London: 29
- Rome: 17
- Dubai: 13
National Comparison

Annual Tourists in 2013 (Millions)

- Orlando: 57
- New York City: 54
- Chicago: 48
- Los Angeles: 44
- Las Vegas: 40
- San Diego: 34
- New Orleans: 9

Source: Individual City Reports
National Comparison

Total Spending by Tourists in 2013 (Billions)

- **Orlando**: $76.00
- **New York City**: $38.80
- **Las Vegas**: $33.50
- **Los Angeles**: $19.60
- **Chicago**: $13.00
- **San Diego**: $9.20
- **New Orleans**: $6.47

Source: Individual City Reports
Visitors to Florida - 2014

Number of Visitors in Millions

Annual Visitors to Florida

- International Visitors to Florida: 15
- Domestic Visitors to Florida: 83.5

International Visitors to USA

- International Visitors to All Other States: 60
- Domestic Visitors to Florida: 15

*Data does not include staycation trips

Source: VisitFlorida 2014
Arrival Patterns

Seasonality of Arrivals of All Florida Visitors (except Staycations) - 2014

- January-March: 27.0%
- April-June: 24.8%
- July-September: 24.2%
- October-December: 24.0%

Source: VisitFlorida 2014
Arrival Patterns

Air & Auto Distribution of All Florida Visitors (except staycations) - 2014

2014

50.5%

49.5%

Air

Non-Air

Source: VisitFlorida 2014
Florida Destination Regions

Domestic Visitors to Florida

- Northwest: 10.1%
- Central West: 10.8%
- Central: 36.1%
- Southwest: 9.6%
- Southeast: 17.1%
- Northeast: 7.1%
- Central East: 7.5%
- North Central: 1.8%

Source: VisitFlorida 2014
Travel Purposes

Domestic Visitors to Florida

90% of Visitors travel for Leisure

10% of Visitors travel for Business

Source: VisitFlorida 2014
Leisure Travel Profile

Domestic Visitors to Florida

<table>
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<tr>
<th>Travel Groups</th>
<th>2014</th>
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<tbody>
<tr>
<td>Couples</td>
<td>47%</td>
</tr>
<tr>
<td>One Adult</td>
<td>28%</td>
</tr>
<tr>
<td>Families</td>
<td>19%</td>
</tr>
<tr>
<td>Three or More Adults</td>
<td>6%</td>
</tr>
<tr>
<td>Average Persons</td>
<td>2.2</td>
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Paid Lodging: 64%

Average Stay: 4.4 Nights
Median Stay: 4.0 Nights

Source: VisitFlorida 2014
### Business Travel Profile

#### Domestic Visitors to Florida

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<td>One Adult</td>
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<td>Three or More Adults</td>
<td>3%</td>
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<tr>
<td>Families</td>
<td>2%</td>
</tr>
<tr>
<td>Average Persons</td>
<td>1.4</td>
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- **Paid Lodging:** 90%
- **Average Stay:** 3.1 Nights
- **Median Stay:** 3.0 Nights

Source: VisitFlorida 2014
**Visitor Income Levels**

### Domestic Travel for Leisure

- **Average:** $99,100
- **$150,000+** 19%
- **$100,000 - $149,999** 18%
- **$75,000 - $99,999** 17%
- **$50,000 - $74,999** 17%
- **$35,000 - $49,999** 11%
- **Under $35,000** 12%

### Domestic Travel for Business

- **Average:** $133,900
- **$150,000+** 34%
- **$100,000 - $149,999** 23%
- **$75,000 - $99,999** 17%
- **$50,000 - $74,999** 12%
- **$75,000 - $99,999** 15%
- **Under $50,000** 15%

Source: VisitFlorida 2014
Average Spending Patterns

Domestic Travel for Leisure
Total: $153.10 per person per day

- Lodging: $42.70
- Food & Beverage: $43.30
- Transportation: $43.50
- Shopping: $19.80
- Entertainment/Recreation: $20.10
- Other: $4.60

Domestic Travel for Business
Total: $274.20 per person per day

- Lodging: $128.20
- Food & Beverage: $43.50
- Transportation: $128.20
- Shopping: $4.10
- Entertainment/Recreation: $12.10
- Other: $10.40

Source: VisitFlorida 2014
Florida Resident Visitor Profile

In-State Destinations

- Orlando: 38%
- Tampa/St. Petersburg: 12%
- Other (Not an MSA): 8%
- Jacksonville: 7%
- Daytona Beach/Ormond Beach: 6%
- Miami/Miami Beach: 4%
- Ft....: 4%
- Palm Bay/Melbourne/Titusville: 3%
- Sarasota Bradenton/Venice: 3%
- Gainesville: 2%

Source: VisitFlorida 2014
Florida Resident Visitor Profile

In-State Statistics

Transportation to Destination

- 1%
- 99%

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Expenditure

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<tr>
<td>Average Per Person Per Day</td>
<td>$127</td>
</tr>
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</table>

Paid Lodging: 65%

Average Stay: 2.1 Nights

Source: VisitFlorida 2014
Annual Tourist Spending by Area

USD (in Billions)

Year


Source: BEBR
Theme Park Attendance

Annual Attendance in Millions (2014)

<table>
<thead>
<tr>
<th>Park</th>
<th>Attendance (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magic Kingdom</td>
<td>19.3</td>
</tr>
<tr>
<td>Epcot</td>
<td>11.4</td>
</tr>
<tr>
<td>Animal Kingdom</td>
<td>10.4</td>
</tr>
<tr>
<td>Hollywood Studios</td>
<td>10.3</td>
</tr>
<tr>
<td>Universal Studios</td>
<td>8.3</td>
</tr>
<tr>
<td>Islands of Adventure</td>
<td>8.1</td>
</tr>
<tr>
<td>Sea World</td>
<td>4.7</td>
</tr>
<tr>
<td>Typhoon Lagoon</td>
<td>2.2</td>
</tr>
<tr>
<td>Blizzard Beach</td>
<td>2.0</td>
</tr>
<tr>
<td>Aquatica</td>
<td>1.6</td>
</tr>
<tr>
<td>Wet n’ Wild</td>
<td>1.3</td>
</tr>
</tbody>
</table>

Source: TEA & AECOM 2014
Other Attractions

• Sports (Recreational and Professional)
  – 13.3 Million Visitors to Florida in 2013
  – $18.3 Million in Economic Output

• Cruise Industry
  – 14 Million Visitors to Florida in 2012
  – $2.43 Billion to Gross State Product in 2011

• Retail
  – Mall at Millenia, Florida Mall, Premium Outlets

Source: Office of Freight, Logistics, and Passenger Operations (FLP) and Florida Sports Foundation
Domestic Industry Latent Demand

• **658 million vacation days went unused in 2015**

• Average Employed Adult used 16 vacation days per year (2015)
  – Average has declined since 2000
  – Long Term Average from 1976 to 2000 was 20 days

• **Economic Impacts**
  – Lost $223 billion in economic output
  – Forfeited $61.4 billion in benefits

Source: Project Time Off
Task 1 - Information Gathering & Research
Purpose

• Identify and inventory visitor data sources
• Serve as a tool for visitor analyses
• Link transportation infrastructure to Florida resident and visitor use
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 – pros and cons
• Keep end goals in mind – CFRPM, TransValU
• Deliverable: Visitor Data Dictionary
Data Sources
Datasets

• Visit Florida
  – Domestic Visitor Profile
    • Automobile Traveler
    • Air Traveler
    • Leisure Traveler
    • Business Traveler
  – International Visitor Profile
  – Florida Resident Travel

• Visit Orlando
  – Quarterly enplanements
  – Hotel Occupancy and Daily Room Rates
  – Convention/Tradeshow Attendance

This year in Orlando:
  (Jan – Jun 2016)
  • 14.4 million enplanements at MCO
  • 571,000 convention attendees at OCCC
Datasets

- **BEBR**
  - Spending by Tourists in Florida
- **Florida Chamber of Commerce**
  - Medical Tourism
- **Florida Sports Foundation**
  - Economic Impact of Professional/Recreational Sports in Florida
- **Florida DBPR**
  - Food Service Licenses and Units by County
  - Lodging Licenses and Units by County

Sports and recreation attracted **13.3 million** visitors in 2014!
Datasets

• CLIA
  – Economic impacts of cruise industry
  – Cruise passenger embarkations per port
  – Florida resident cruise passengers

• EDR
  – Tourist Development Taxes
  – Return on tourism investment

• Florida TaxWatch
  – Cruise Industry
  – Investing in Transportation
  – Forecasted Tourism Growth
  – Medical Tourism

Florida earned $3.20 in tax revenue for each $1 invested in Visit Florida in 2015
Datasets

• AirSage
  – Cellular phone data
Information

• Data Attributes

• Geographic Scale of Data

• Special Notes
  – Updates to Data?
  – Historical Information?

• Potential Benefits / Limitations

• Data Acquisition
  – Cost
  – Proprietorship
<table>
<thead>
<tr>
<th>Data Source</th>
<th>Data Set</th>
<th>Key Attributes for Study</th>
<th>Geographic Scale of Data</th>
<th>Cost</th>
<th>Web Link (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida DBPR</td>
<td>Public Food Service and Lodging License and Unit Summary by County</td>
<td>Food Service, Lodging</td>
<td>County level</td>
<td>Free to the general public (datasets obtained online)</td>
<td>Florida License Statistics</td>
</tr>
<tr>
<td>CLIA</td>
<td>Contribution of the International Cruise Industry to the US Economy</td>
<td>International Cruise Industry Impacts to the US, Individual State, and the Florida Economy</td>
<td>International level, with attributes at the state level</td>
<td>Free to the general public (datasets obtained online)</td>
<td>US Economic Impact Study.pdf</td>
</tr>
</tbody>
</table>
Lessons Learned

• Quantity of Data
  – Lots of free data!
• Constantly Evolving Categories
• Staycations
• Temporary Residents
• Importance of Definition
• Difficulty in Data Fusion
Lessons Learned

- Granularity of Data
- Proprietary Data
- Data Quality Control (QA/QC)
  - Reasonableness check
- Significant Impact on Transportation Systems
Next Steps – Task 2

• Assemble and Analyze Data
• Generate Data Framework Report
• Global Review of Tourism Attractions
• Create Visitor Economic and Revenue Analysis Tool (TransValU Module)
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