



Central Florida Visitor Study

Central Florida Metropolitan Planning
Organization Alliance | October 11, 2019



Florida Visitor Projections

2000

72.8 M

*Visitors**

\$49.9 B

Visitor Spending

2018

126 M

*Visitors**

\$111.7 B

Visitor Spending

2025

162 M

*Visitors**

Are Our Transportation Systems **Ready?**

**Data does not include staycation trips*

Sources: Visit Florida, Florida Chamber of Commerce

Background



Study Initiation

Central Florida Visitor Study began in 2015

History

Previous visitor study was performed in 2000, with a minor update in 2003

Purpose

Fully understand visitor travel within the region and develop strategies to prepare for expected growth



Agenda

- Study Objectives
- Outcomes & Results
- MPOs & Visitor Planning



Study Objectives

Objective One

Fully understand visitor travel in the region to enhance planning tools (CFRPM, TransValU)

Objective Two

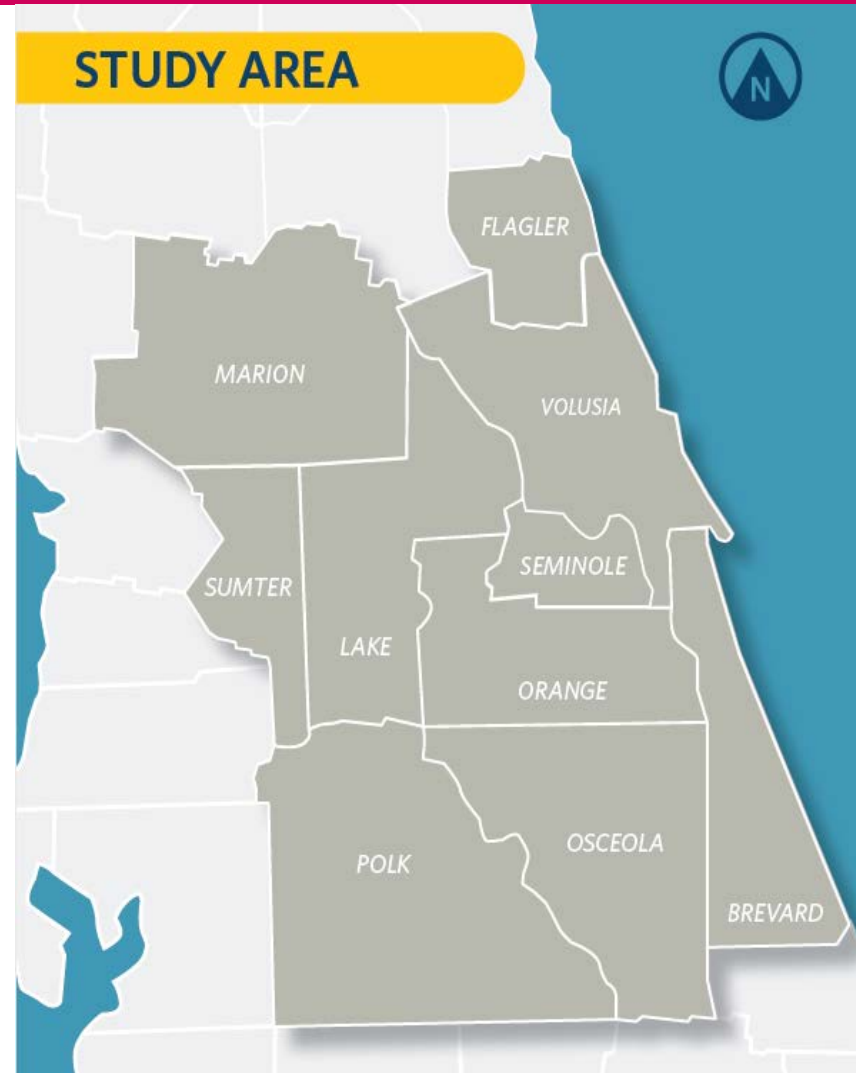
Create visitor economic impact analysis tool to assess future transportation strategies

Objective Three

Maximize return on investment for tourist related transportation projects

Objective Four

Assist MPO partners with meeting FAST Act Requirements



Project Advisory Group (PAG)



PAG was established to help guide the study regarding:



Local Insight

Provide local perspective & priorities



Project Feedback

Help guide direction project influences and results



Regional Needs

Assist with determining regional needs of visitor travel demands



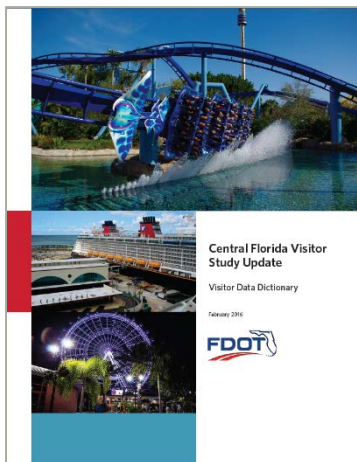
Implement Results

Use results to better inform visitor transportation decisions



Outcomes & Results

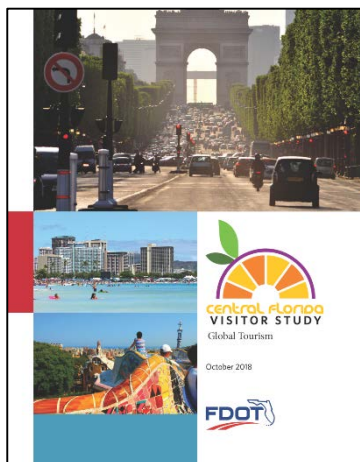
Published Reports



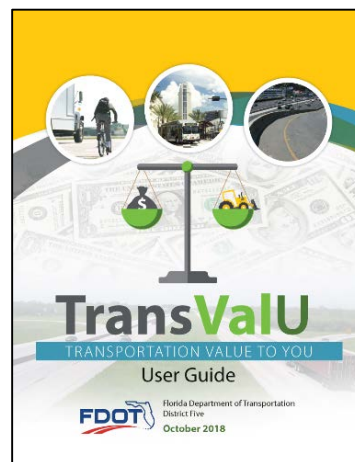
Visitor Data Dictionary:
Identify visitor data sources



Visitor Data Analysis:
Compile and analyze data



Global Review of Visitor Attractions:
Case study of top tourism destinations



TransValU Visitor Module:
Understand impacts of transportation projects and visitor spending on the area economy

Visitor Characteristics

Domestic Visitors: Trip Purpose

89%

Leisure

11%

Business

0%

Other

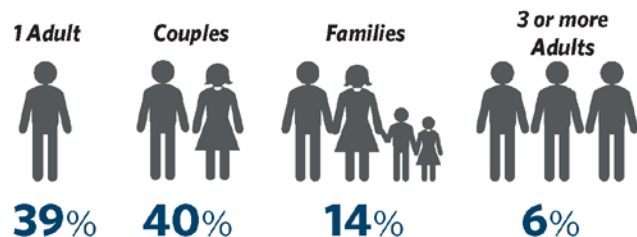
Visitor Characteristics

Domestic Visitors: Profile

Destination Region

Traveler Age

Travel Party Composition



Accommodations

City Comparisons Index



Rank	City	Total Annual Visitors* per Population
1	Washington D.C.	31.3
2	San Francisco	28.4
3	Orlando (MSA)	27.5
4	New Orleans	24.8
5	San Diego	24.1
6	Las Vegas (MSA)	20.1
7	Chicago	18.6
8	Toronto	16
9	Vancouver	14.7
10	Los Angeles	11.5

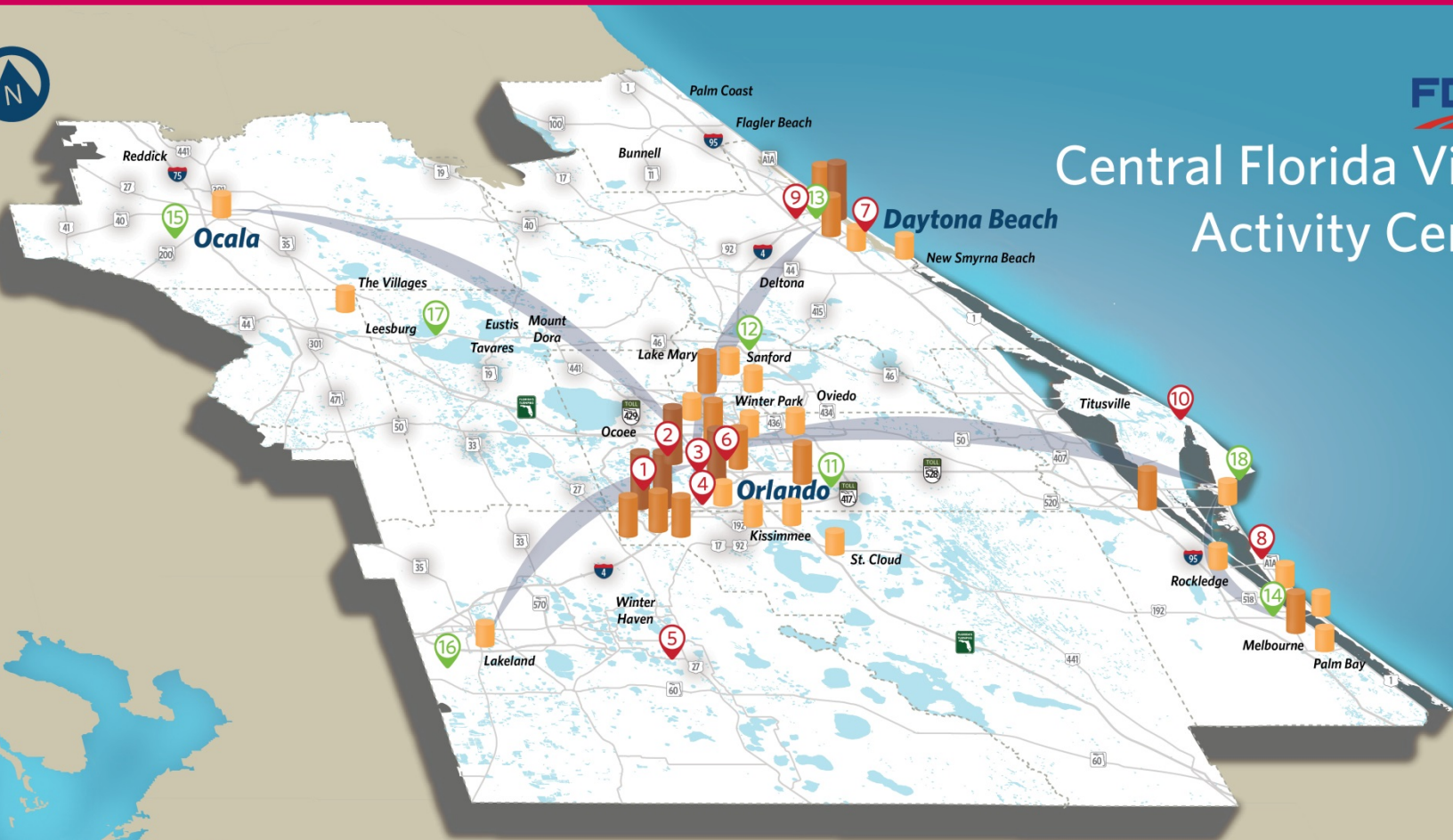
* Includes international, domestic, and “staycation” trips.

Sources: Individual City Reports, 2015 (based upon City’s population unless stated otherwise)

Visitor Activity Centers



Central Florida Visitor Activity Centers



ATTRACTIONS

- 1 Walt Disney World
- 2 Universal Studios Florida
- 3 Sea World
- 4 International Drive
- 5 LegoLand
- 6 Orange County Convention Center
- 7 Daytona Beach
- 8 Cocoa Beach
- 9 Daytona International Speedway
- 10 Kennedy Space Center

TRANSPORTATION

- 11 Orlando International Airport
- 12 Orlando-Sanford International Airport
- 13 Daytona Beach International Airport
- 14 Melbourne International Airport
- 15 Ocala International Airport
- 16 Lakeland Linder Regional Airport
- 17 Leesburg International Airport
- 18 Port Canaveral

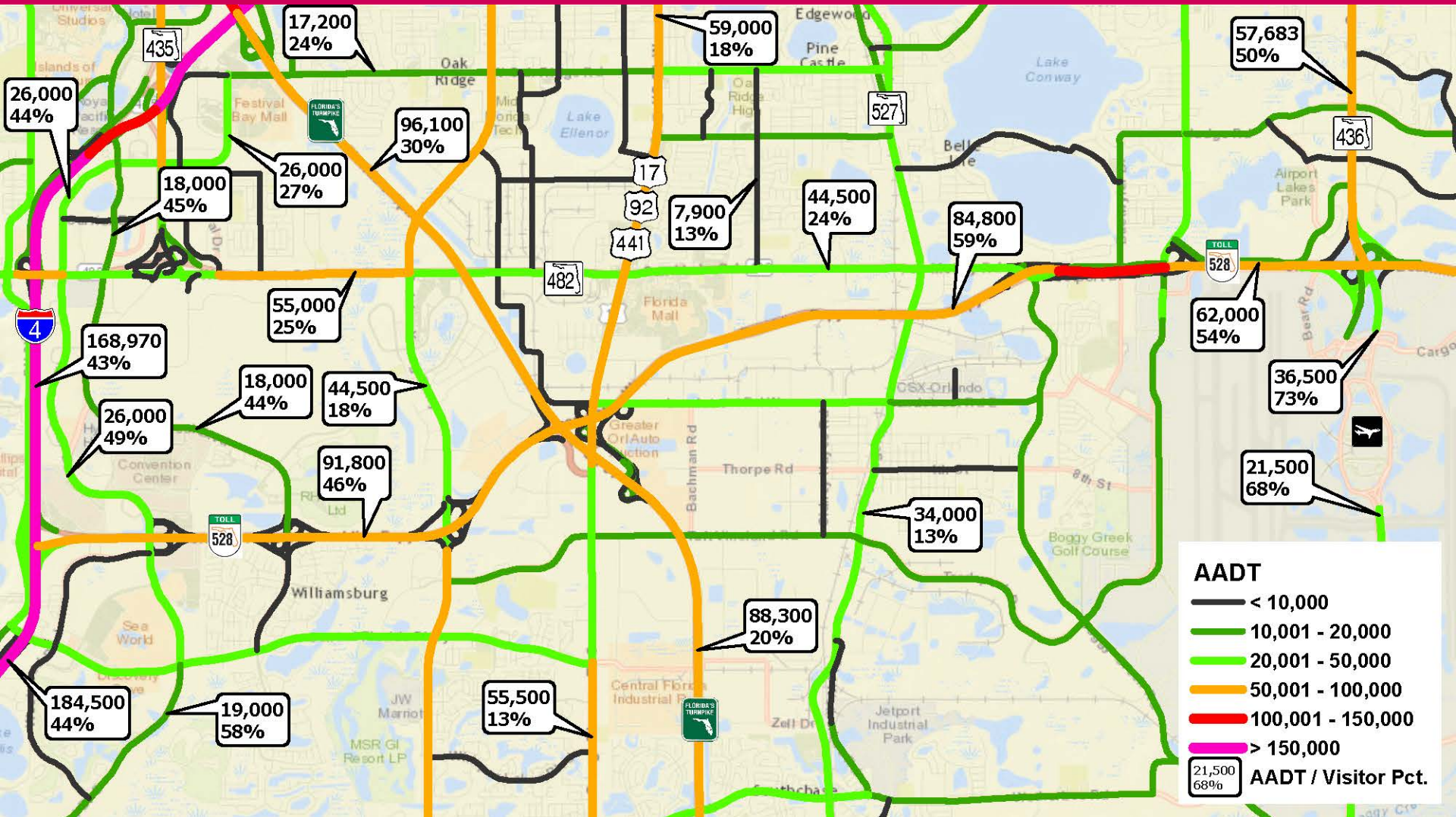
DAILY VISITOR TRIP CONCENTRATION (2015)



Please visit our page at:

<http://cfgis.org/FDOT-Resources/Central-Florida-Visitor-Study.aspx>

AADT and Visitor Percentage





Scenario Planning & Recommendations

Scenario Summaries: 2045



SCENARIO 1
TREND

Programmed Projects, Sharing Economy

- Road Widening
- TNCs
- Tolls/Express Lanes
- Intercity Rail - Virgin
- SunRail
- Visitor Growth



MORE VISITORS



SCENARIO 2
ASPIRATIONAL

Visitor Corridor Premium Transit

- Premium Transit
- Visitor Industry PPPs
- Hotel/TNC Partnerships
- Digital Wayfinding



**MORE
CONNECTIONS**



SCENARIO 3
FUTURISTIC

Rise of ACES and Smart Infrastructure

- ACES
- Smart City Design & Infrastructure Upgrades
- Innovative Finance



MORE WIRELESS

Scenario Evaluation Goals

FTP Goals

Through a Visitor Lens

1 Safety and security for residents, visitors, and businesses

2 Agile, resilient, and quality transportation infrastructure

3 Efficient and reliable mobility for people and freight

4 More transportation choices for people and freight

5 Transportation solutions that support Florida's global economic competitiveness

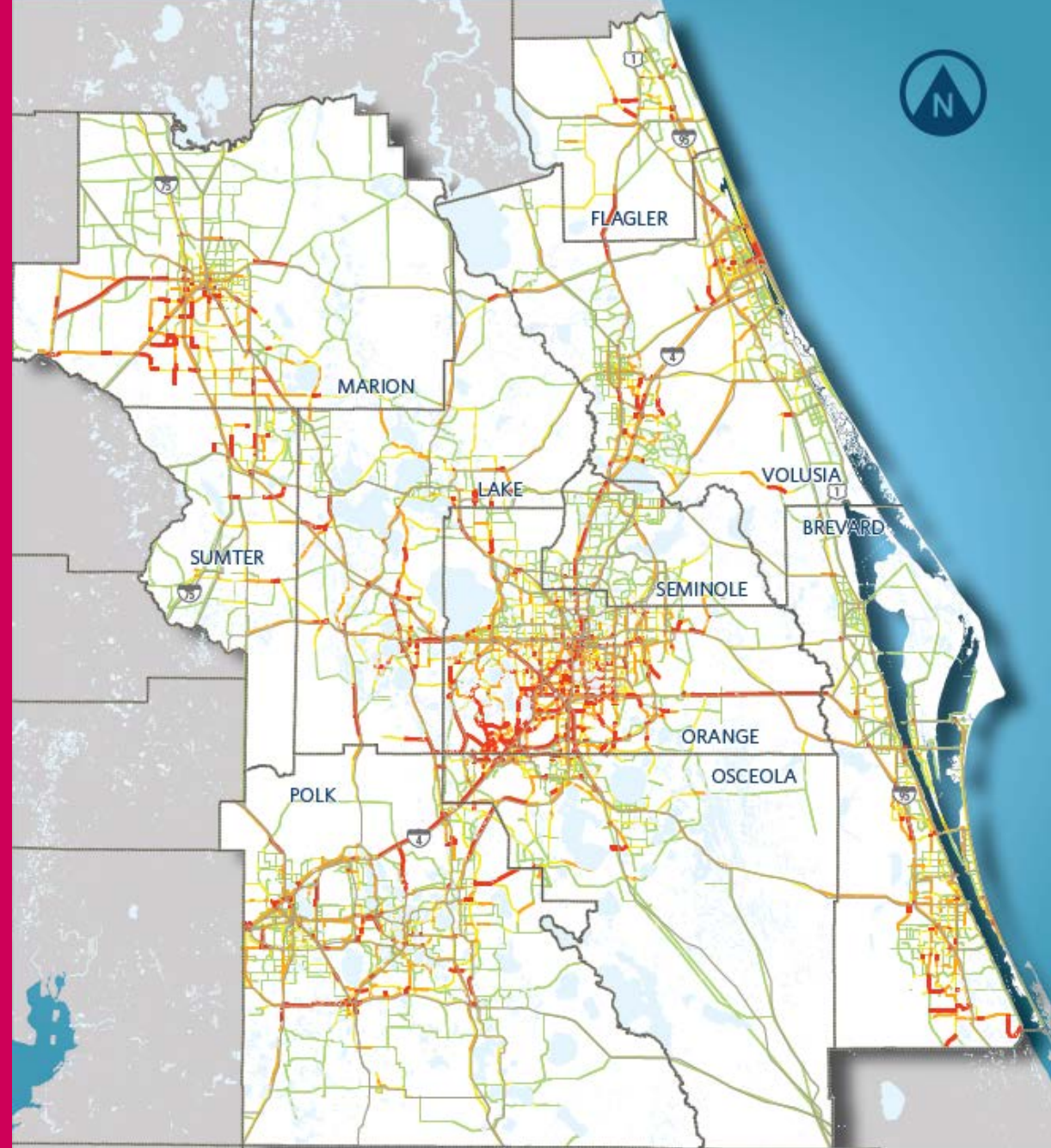
6 Transportation solutions that support quality places to live, learn, work, and play

7 Transportation solutions that support Florida's environment and conserve energy

Congestion

TREND SCENARIO

Daily Average Roadway Congestion



Volume/Capacity Ratio

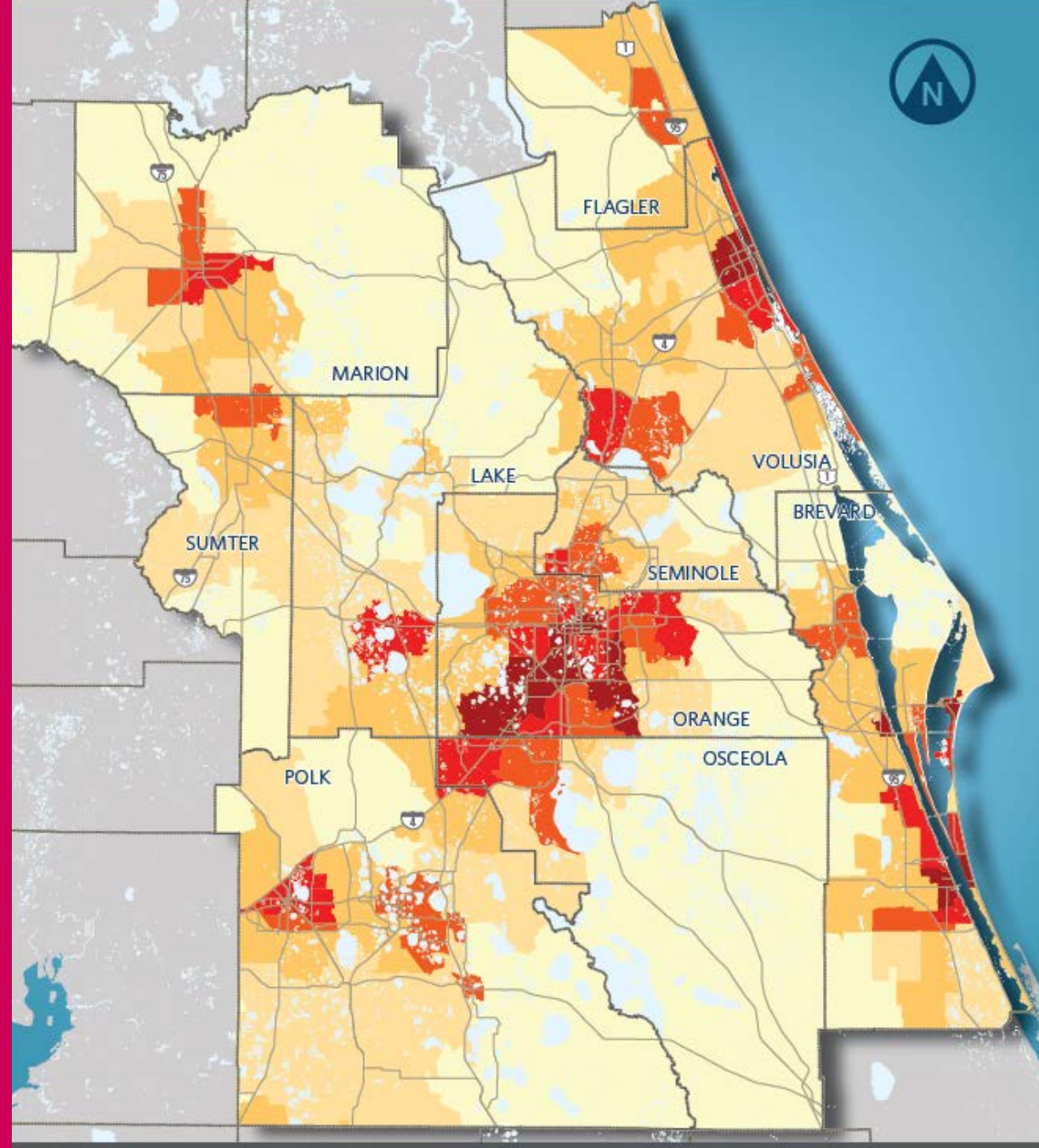
LEGEND:

— <0.4 — 0.5 - 0.74 — 0.75 - 0.99 — > 1

Visitor Travel

ASPIRATIONAL SCENARIO

Daily Average Visitor Trips by Zip Code



Visitors per square mile

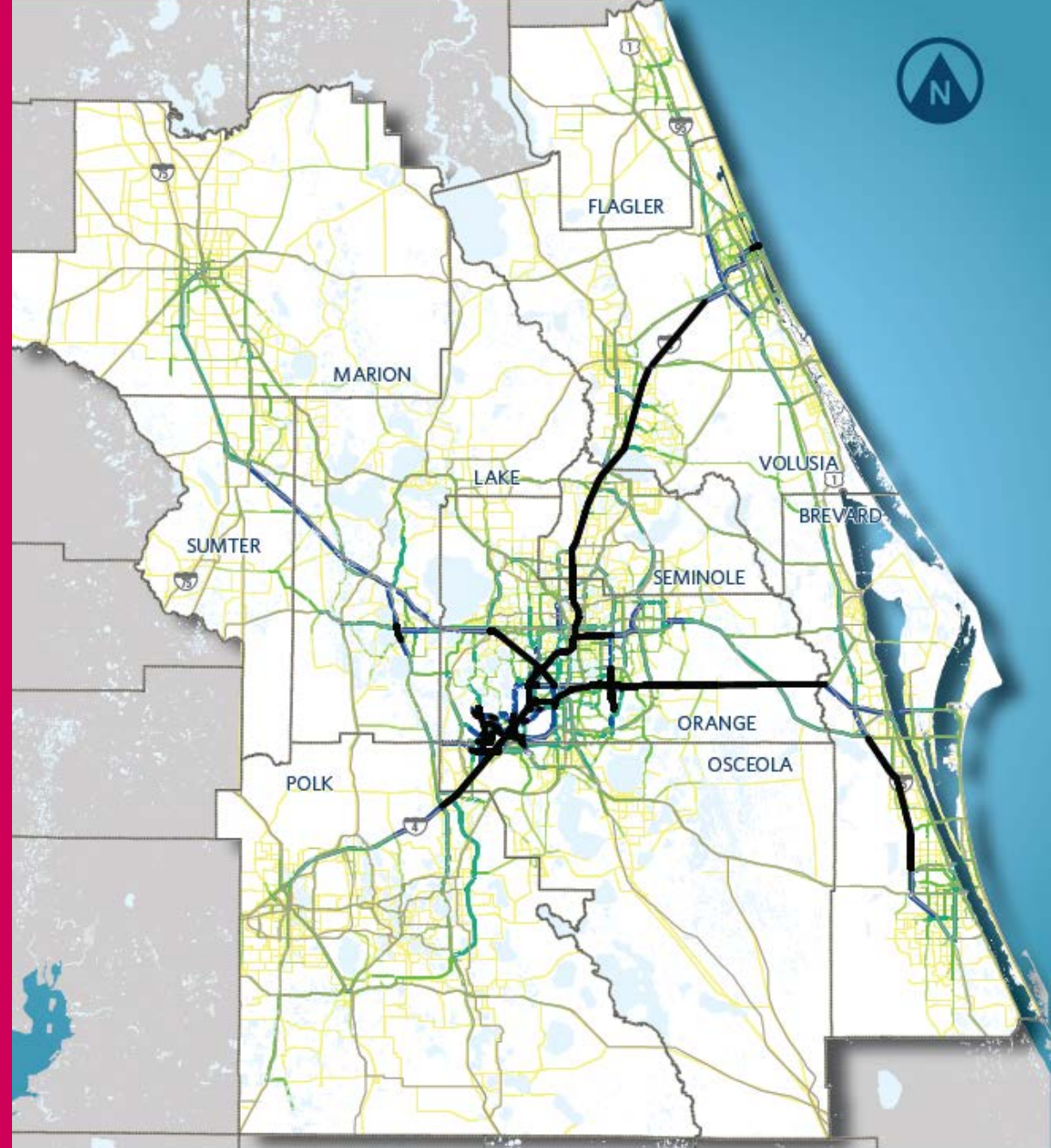
LEGEND:

≤ 100 101 - 500 501 - 1000 1001 - 2000 2001 - 5000 > 5000

Visitor Trips

FUTURISTIC SCENARIO

Daily Total Visitor Traffic on Roadways



Average Daily Traffic

LEGEND:

0 - 2,000

2,001 - 5,000

5,001 - 10,000

10,001 - 20,000

20,001 - 30,000

> 30,000

Recommendations



1

Institutionalize Visitor Mobility Planning

- Continuation of Visitor Study Project Advisory Group (PAG)
- Identification of champion/lead
- Periodic visitor data updates & exchange
- Support FAST Act Metropolitan Planning Organization (MPO) requirements



2

Improve Visitor Travel Experience Through Global Best Practices

- Innovative partnerships
- Leverage SunRail as visitor asset
- Multimodal marketing
- Funding opportunities



3

Offer Alternative & Direct Visitor Travel Options to Origins/Destinations

- Offer alternate corridors and multimodal options to avoid congestion
- Provide direct and seamless connections between areas with a high number of visitors such as Orlando International Airport (OIA), International Drive, Orange County Convention Center, and Walt Disney World Resort



4

Develop Multimodal Maintenance of Traffic (MOT) for Event-Driven Visitor Activities

- Reduce impact of popular events on community and regional travel
- Track seasonal surges of visitor traffic to identify patterns
- Strategize mobility plans for area commuters and local traffic, including transit and rideshare

Meet Low-Income, Visitor Industry Workforce Commute Needs

- Expand commute options for low-income visitor industry employees
- Provide access to higher frequency, premium transit links
- Collaborate with visitor employers to create reliable mobility



5

Leverage Synergies Between Tourism & Transportation Sector Partners

- Include visitor industry stakeholders in transportation projects: visitor bureaus, theme parks, hotels, mobility companies, AirBnB, etc.
- Forge cross-sector partnerships to leverage industry insights and resources
- Jointly develop/fund transportation projects that serve the visitor industry



6

Prepare Visitor Infrastructure for Emerging Trends

- Mainstream inclusion of technology elements in transportation projects
- Rideshare curb management
- Electrification support
- Micro-mobility in right-of-way
- Communications network



7

Improve System Resiliency to Endure Disruptions

- Plan for disruptions (especially for high visitor concentration areas)
- Identify corridors needing alternative routes for evacuation
- Consider visitor physical and cyber safety and security



8



MPOs & Visitor Planning

FAST Act Planning Requirements



CONSULT



CONSIDER



IMPLEMENT

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