Northeast Florida Tourism Mobility Study

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ACRONYMS

AV	Automated Vehicle
BRT	Bus Rapid Transit
CIP	Capital Improvement Plan
CFP	Cost Feasible Plan
FCE	First Coast Expressway
FHWA	Federal Highway Administration
FTA	Federal Transit Authority
I-10	Interstate 10
I-95	Interstate 95
I-295	Interstate 295
ITS	Intelligent Transportation Systems
JAX	Jacksonville International Airport
JEA	Jacksonville Electric Authority
JTA	Jacksonville Transportation Authority
LRTP	Long Range Transportation Plan
NFRA	Northeast Florida Regional Airport
RRFB	Rectangular Rapid Flash Beacon
TDC	Tourism Development Council
TDM	Traffic Demand Management
TPO	Transportation Planning Organization

UUC Ultimate Urban Corridor

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North Florida TPO
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1.0 INTRODUCTION

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According to *Visit Florida,* the state's official tourism marketing corporation, Florida's tourism industry welcomed 127 million visitors in 2018. These visitors contributed $91.3 billion to Florida's economy and supported over 1.5 million Florida jobs in 2018. As a method of addressing the tourism needs in northeast Florida, the North Florida Transportation Planning Organization (TPO) tasked Atkins with conducting a Northeast Florida Tourism Mobility Study to identify opportunities to enhance tourism mobility throughout the TPO region. The findings of this report will help guide future tourism and transportation projects.

Consistent with Goal 8 of the 2045 Long Range Transportation Plan (LRTP), the focus of the Study is to identify opportunities to enhance tourism transport management by improving transportation options for recreational, special event, medical and general tourism travel by providing diverse tourism travel options and encouraging the integration of alternative transportation into tourism activities.

This Study involved the following elements: a best practices component which reviewed and summarized examples of tourism mobility plans throughout the country; an overview of planned projects throughout the region that will influence tourism mobility; a local agency outreach element to solicit input from local tourism agencies; and opportunity identification.

This document is organized into the following sections:

- **1.0 Introduction and Background:** Provides the context and purpose of the study.
- **2.0 Local Agency Outreach:** Summarizes the results of the existing conditions analysis.
- **3.0 Opportunity Identification:** Summarizes the results of the needs analysis.
- **4.0 Conclusion:** Provides a final overview of the study.

Jacksonville Northbank Riverwalk. Source: Study Team.

1.1 Study Context and Background

The study context and background notes specific characteristics of the TPO Region as well as identifies popular destinations and tourism activities.

Study Area

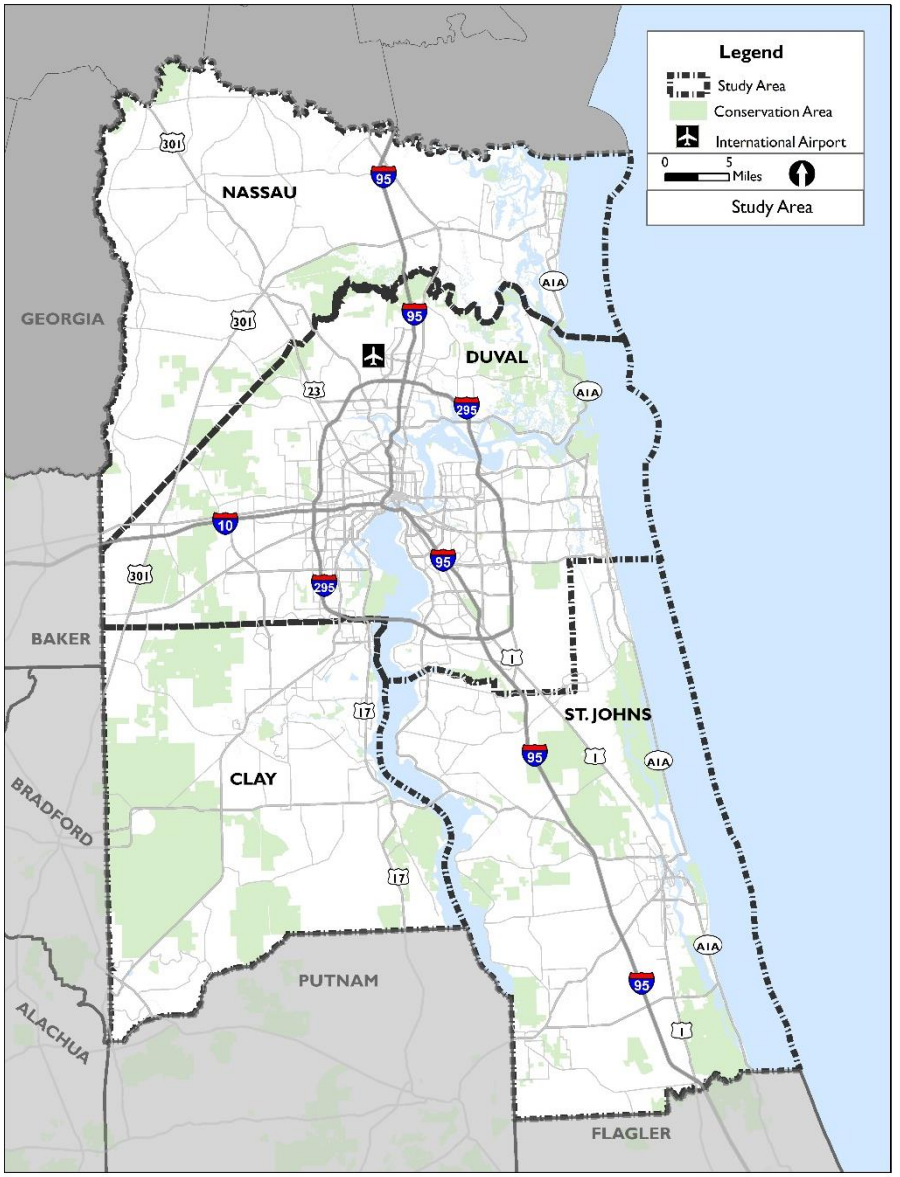
The North Florida TPO Study area includes Clay, Duval, Nassau, and St. Johns counties including the incorporated cities of Atlantic Beach, Fernandina Beach, Green Cove Springs, Jacksonville Beach, Keystone Heights, Neptune Beach and the towns of Baldwin, Callahan, Hilliard, Orange Park and Penney Farms. The study area encompasses approximately 3,000 square miles and has 1.4 million residents. The study area is displayed in Figure 1.

Study Infrastructure

The area is predominately auto-oriented, with the majority of residents and visitors navigating the region via personal vehicle. Three major interstates traverse the study area and include: Interstate 95 (I-95), Interstate 295 (I-295), and Interstate 10 (I-10). Other major roadways are US 1, US 17, US 23, and US 301.

The study area is also home to three airports: Jacksonville International Airport (JAX) and Jacksonville Executive Airport (JAXEX) in Duval County and the Northeast Florida Regional Airport (NFRA) in St. Augustine.

Figure 1. Study Area Map



Study Context

Northeast Florida, also known as the First Coast, features the urban settings of Jacksonville and St. Augustine (the nation's oldest city), as well as a variety of natural areas and coastal destinations. According to *Visit Florida*, the top tourism destinations within the TPO region include the following:

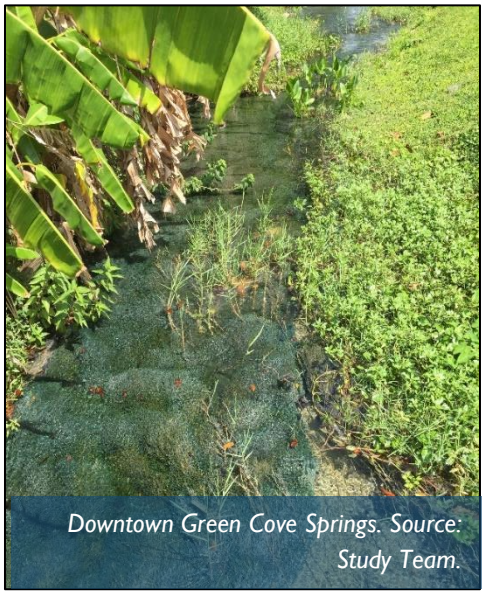
- **Fernandina Beach and Amelia Island (Nassau County)**

  The City of Fernandina Beach is located on the northern end of Amelia Island (one of the state's "most exclusive resort destinations" according to *Visit Florida)* in the northeastern corner of Nassau County. Amelia Island is a barrier island between the Amelia River and the Atlantic Ocean. Fernandina Beach offers boutique shopping and restaurant opportunities in its downtown district, hosts the annual Isle of Eight Flags Shrimp Festival, and is known for the golfing opportunities. Amelia Island features upscale resorts, spas, bed and breakfasts, historic sites, and coastal recreational and leisure opportunities. Fernandina Beach and Amelia Island have consistently been among Florida's highest-ranked island destinations.

Fernandina Beach. Source: Study Team.

- **Green Cove Springs (Clay County)**

  Green Cove Springs is a small town first settled in the mid-1800s. Green Cove Springs is known for its sulfur springs, small, historic downtown atmosphere, as well as its proximity to the St. Johns River. Green Cove Springs offers a historic homes tour, beautiful scenery, a military museum, and hosts several festivals throughout the year.



Downtown Green Cove Springs. Source: Study Team.

- **Jacksonville (Duval County)**

  Visit Florida describes Jacksonville as a "natural paradise for visitors looking for an affordable yet luxurious destination". The urban core features residential villages and unique, historic neighborhoods. Jacksonville offers restaurants, shopping and a variety of professional sports opportunities. Also described as the "River City by the Sea", Jacksonville has more than 20 miles of beaches, close to 40 miles of intracoastal waterway, and is on the St. Johns River. Jacksonville is also home to many local, state and national parks.

- **Jacksonville Beaches (Duval County)**
  The Jacksonville Beaches ("The Beaches" locally) are comprised of Atlantic Beach, Neptune Beach, and Jacksonville Beach. The beaches offer golf courses, a fishing pier, beach volleyball, surfing, and other water and leisure activities. The area also offers shopping opportunities and dining districts.

Baseball Grounds of Jacksonville. Source: Study Team.

- **St. Augustine (St. Johns County)**
  St. Augustine is the nation's oldest continuously settled city founded in 1565. The city is full of historically significant structures, including the *Castillo de San Marcos*, which is a historic fort overlooking the Matanzas Inlet. In addition to historic destinations, St. Augustine features a walkable downtown district with hotels, shopping, restaurants, Flagler College, and the Lightner Museum. Nearby attractions to historic St. Augustine include St. Augustine Beach, Ponce de Leon's Fountain of Youth, the St. Augustine Alligator Farm Zoological Park and the St. Augustine Lighthouse.

- **Ponte Vedra Beach (St. Johns County)**
  Ponte Vedra Beach is home to the PGA Tour Headquarters and hosts The Players Championship (TPC) annually at the *TPC Sawgrass* golf club. Ponte Vedra Beach is also a major resort destination, home to the *Ponte Vedra Inn & Club* and *The Lodge & Club Ponte Vedra Beach*. In addition to golf, Ponte Vedra Beach offers scenic drives down SR A1A, white sand beaches with 40-foot sand dunes, and miles of freshwater streams, creeks and lagoons. Ponte Vedra Beach is also home to the Guana Tolomato Mantanzas Estuarine Research Reserve ('Guana'), a popular destination for hiking, boating and fishing.

Flagler College, St. Augustine. Source: Study Team.

1.2 Existing and Planned Projects

It is important to document the existing and planned projects within the region that impact regional tourism. Many existing and planned projects within the region will impact mobility for visitors. These projects include the First Coast Expressway, projects listed in local Capital Improvements Plans (CIPs) and projects listed in the 2045 Long Range Transportation Plan (LRTP). Further details on these existing and planned projects are included in this section.

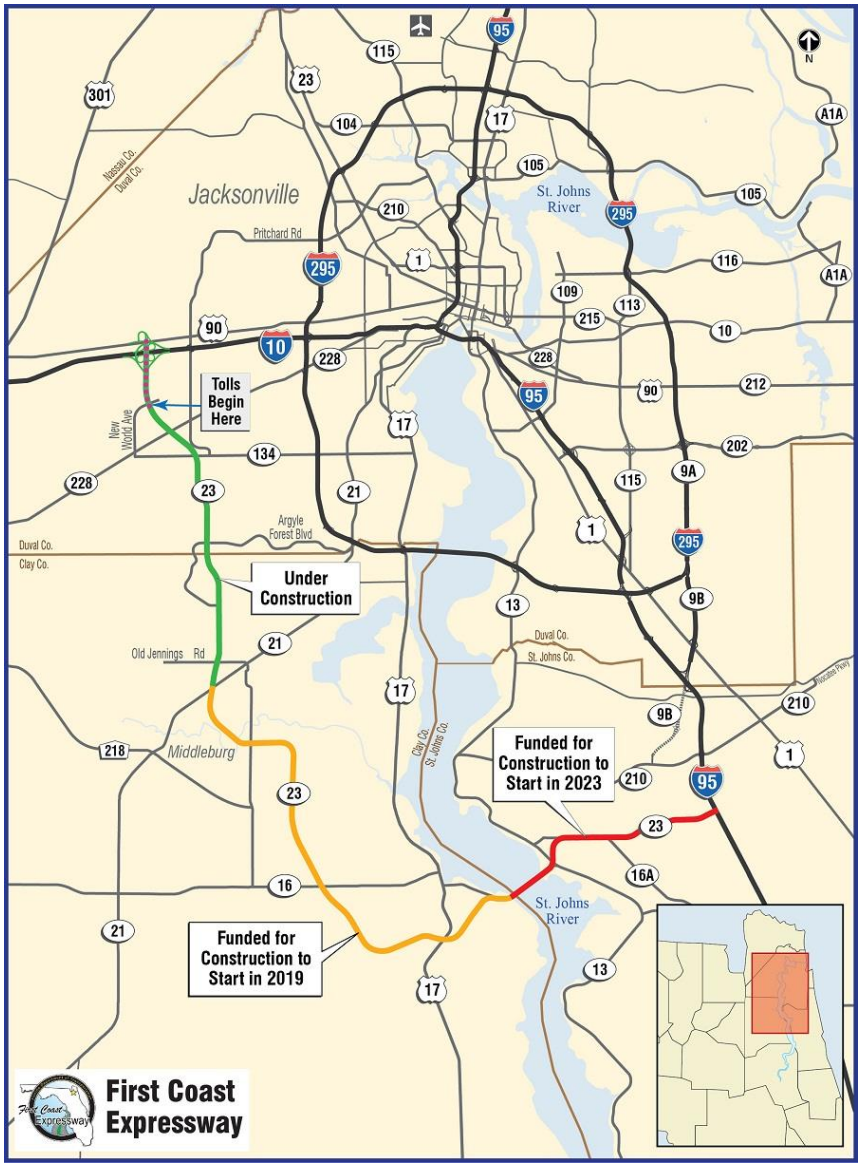
First Coast Expressway

The First Coast Expressway (FCE, SR 23) is an FDOT project for a multi-lane, limited access toll road that will cross parts of Duval, Clay and St. Johns Counties once completed (see Figure 2). The total length of the proposed roadway is approximately 46 miles. Expressway traffic will pass through electronic toll gantries without stopping. The gantries will contain an electronic system that will either detect the vehicle's SunPass transponder device or scan the vehicle's license plate for a toll-by-plate invoice in the mail.

Previously referred to as the 'outer beltway', the FCE provides an alternative route to Interstate 10 (I-10) and Interstate 95 (I-95) . The FCE is intended to reduce congestion on other major roadways within the region and will benefit daily commuters, visitors to the region, and storm-related evacuation. Construction on the roadway began in July 2019 and construction funding of the final segment is to start in 2023.

More information about the FCE can be found at www.firstcoastexpressway.com.

Figure 2. FCE Project Map



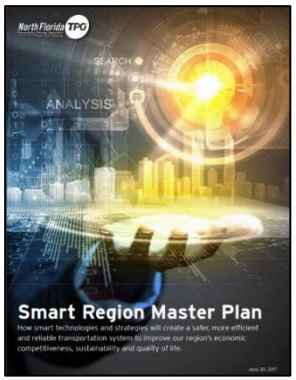
Source: www.firstcoastexpressway.com

SMART NORTH FLORIDA

Smart North Florida is using innovative and emerging technologies to collect, analyze, and apply data to solve problems and enhance the livability of the region.

The founding partners of *Smart North Florida* include the City of Jacksonville, the City of St. Augustine, Jacksonville Transportation Authority (JTA), Jacksonville Electric Authority (JEA), and the North Florida TPO. Planning and implementing partners include a variety of public and private entities supporting *Smart North Florida*.

The *Smart Region Master Plan* was adopted in June 2017 by the North Florida TPO. The plan details how smart technologies and strategies will create a safer, more efficient and reliable transportation system to improve the region's economic competitiveness, sustainability and quality of life. The initial focus of the *Smart Region Master Plan* is on transportation, but Smart North Florida is expanding to include utilities and other public assets in Clay, Duvval, Nassau and St. Johns counties.



The objectives of *Smart North Florida* include the following:

- **Safety**: Provide a safer transportation network
- **Mobility**: Provide a transportation network that is consistent and reliable for all users
- **Energy/Climate**: Reduce emissions and energy consumption
- **Opportunity for All**: Provide accessible, reliable and affordable multi-modal options for individuals with varied needs
- **Grow North Florida**: Grow the economy by providing a versatile and adaptable transportation network

Current projects via *Smart North Florida* relevant to tourism mobility include the following:

- **Electric Autonomous Shuttles**: More details included under the *LRTP Projects* section of this report.
- **First and Last Mile Connections**: Transit will be more accessible by providing connections between homes, destinations and transit stops and subsidizing mobility services such as Lyft, Uber, AV shuttles, and bike and car sharing.
- **North Florida Traffic App**: Provide more traveler information and dynamic rerouting around incidents and other congestion.
- **Pedestrian Sensors**: Sensors to notify drivers with dynamic warning signs and signal preemption.
- **Public Broadband Network**: Broadband wireless will enable internet-based features such as wayfinding kiosks.
- **Smart Parking**: Parking lot occupancy data will show parking availability and enable payment via smartphones and kiosks.
- **Special Event Traffic Management System:** Sensors will collect and provide transportation and routing information.
- **Wayfinding and Event Management:** Roadside kiosks and smart phone applications will provide information for residents and visitors.

More information about *Smart North Florida* can be found at https://smartnorthflorida.com/

Capital Improvement Plans (CIPs)

Capital Improvement Plans (CIPs) are short-range plans of five (5) years identifying capital projects and purchases. CIPs also include scheduling purchases and identifying finance options for implementing the plan.

Overall, CIPs provide a link between a county's comprehensive and strategic plans and the annual budget. Included in CIPs is a list of general traffic circulation improvements such as road widenings and extensions. Traffic circulation improvements should have a positive impact on tourists traveling through the region.

In addition to general traffic circulation improvements, the following list of projects in local CIPs will influence regional tourism mobility. These projects typically address parking expansions or improvements, bicycle and pedestrian infrastructure and safety improvements (such as trail projects), and other recreational and ecotourism-related improvements.

This list is not comprehensive but provides a general overview of the types of projects and programs currently funded in each county. Further details regarding local CIPs can be found on the county and municipal websites.

- **Clay County**
  - Keystone Heights Trailhead (Clay County project): Expected to provide increased parking opportunities and facilities for the Palatka to Lake Butler State Trail (included in the 2019/20 budget).
  - City of Green Cove Springs and Town of Orange Park Sidewalk Programs: Build/improve sidewalk system within the City of Green Cove Springs and Town of Orange Park to improve pedestrian mobility.

Downtown Green Cove Springs. Source: Study Team.

- **Duval County**
  - Sidewalk Projects**:** ADA compliance of curb ramps and sidewalks to increase safety of residents and visitors; Sidewalks/curb construction and repair; McCoy's Creek Pedestrian Bridge (new) providing pedestrian connectivity
  - Roadway Safety Projects: Pedestrian crossings including Rectangular Rapid Flash Beacons (RRFBs) to increase safety and connectivity; roadway bicycle improvements
  - Parking Projects: New parking decks (Liberty Street/Coastline Drive); additional parking for Alberts, Cecil, and Sheffield Fields; parking garage renovation (Water Street)
  - Trail Improvement Projects: Repaving the Jacksonville Baldwin Rail Trail, Cecil Trail Extension, Hogan's Creek Connector, Hanna Park Trail repairs, Timucuan Trail Extension, McCoy's Creek Greenway
  - Other Parks and Recreation Improvements: Mandarin Park Kayak Launch (expands kayak launch capacity); Seaton Creek Historic Preserve (new road, parking, kayak launch, and access); 9A/Baymeadows Park (new fields and parking lot); Mayport Road Park (new park and trail facilities)

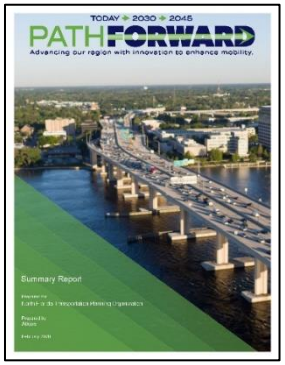
- **Nassau County**
  - Amelia Island Parkway Trail (all sections): Improvement/extension of this trail will increase alternative transportation mobility and ecotourism
  - City of Fernandina Beach: Beach walkover construction, Ssidewalks and trails expansion and improvement

- **St. Johns County**
  - Beach Walkover and Off-Beach Parking Improvements (county-wide): Will increase pedestrian and vehicular beach accessibility and parking capacity
  - Trail Extensions and Pedestrian Improvements: Including the St. Johns River to Sea Loop. Will promote alternative transportation mobility and ecotourism
  - County Parks Improvements: Includes expanding parking lots and signage to increase vehicular capacity and wayfinding within county parks

Vilano Beach, St. Johns County. Source: Study Team.

Long Range Transportation Plan (LRTP) Projects

The Long Range Transportation Plan (LRTP) is the blueprint to maintain and enhance the regional transportation system. LRTPs include a list of multi-modal transportation projects that are needed and can be potentially funded over a 20-year horizon. The LRTP is updated every five years with projects that are needed the most and can be funded based on new growth trends, developments and technologies.



The current LRTP for the North Florida TPO region is the 2045 LRTP approved in November 2019. Some of the projects included with the 2045 LRTP will impact regional tourism mobility within the region. These projects are listed below.

- **Commuter Rail Projects**: The addition of commuter rail service is included throughout the region and classified as TPO priority. The following projects are included in the 2045 LRTP:
  - Southeast Commuter Rail: Commuter rail service from Downtown Jacksonville (Duval County) to St. Augustine (St. Johns County). Listed in the Cost Feasible Plan (CFP) to be funded through the years 2026-2030.
  - North Commuter Rail: Commuter rail service from Downtown Jacksonville (Duval County) to Yulee (Nassau County). Included as a project to be funded through Federal Transit Authority (FTA) Discretionary Transit Service Grants in the years 2036-2045.
  - Southwest Commuter Rail: Commuter rail service from Downtown Jacksonville (Duval County) to Orange Park (Clay County). Included as a project to be funded through FTA Discretionary Transit Service Grants in the years 2036-2045.

- **Ultimate Urban Circulator (U2C):** To be implemented by the Jacksonville Transportation Authority (JTA), the Ultimate Urban Circulator (U2C) is a multi-phased program to convert and expand the existing automated people mover (Skyway) to an autonomous vehicle (AV) network. This expanded network will reach beyond the urban core of Downtown Jacksonville through the Bay Street Innovation Corridor and adjacent neighborhoods to bridge destinations on both sides of the St. Johns River. Three U2C service lines are included in the 2045 LRTP CFP to be funded through the years 2026-2030. Those lines are:

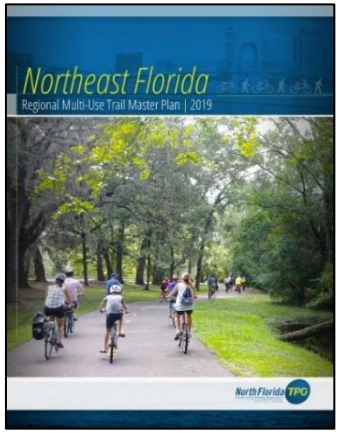
  - Central to Brooklyn/Five Points
  - Central to Springfield
  - Kings Avenue to San Marco

- **Bus Rapid Transit (BRT):** JTA is currently operating premium bus rapid transit service known as the First Coast Flyer. BRT offers customers a frequent, limited stop, easy and reliable way to get around the region. Expanding BRT service to the following areas are included within the 2045 LRTP CFP to be funded through the years 2031-2035 as well as additional lines through the FTA Discretionary Transit Service Grants.

- **Other Transit Projects:** Other transit projects listed in the 2045 LRTP include the following:
  - Mayport Ferry: Increasing the Mayport Ferry service frequency by 50% and adding an additional ferry. To be funded in the years 2026-2030.
  - Water Taxi: New water taxi service from The District to the Shipyard Development. To be funded in the years 2031-2035.
  - Shands Bus Service: Bus service from Clay County to St. Johns County. To be funded in the years 2026-2030.

JTA bus. Source: News | WFOX.

- **Regional Trails Master Plan:** The *Northeast Florida Regional Multi-Use Trail Master Plan* was developed as part of the LRTP process and adopted for the LRTP. Approximately 570 miles of proposed trails are identified in this plan across the four-county TPO region. Trails identified in this plan are limited to off-road, paved trails connecting to larger trail networks, trails that make cross-county and cross-state connections or trails that otherwise serve the region.



St. Johns River to Sea Loop Trail. Source: Study Team.

1.3 Example Tourism Plans

As guidance for this study, a selection of tourism plans were reviewed to identify tourism planning trends and best practices throughout the country with a focus on tourism and transportation. The following plans were reviewed:

- Visit Tucson 10-Year Tourism Master Plan (2019)
- Clay County Tourism Strategic Plan (2018)
- Surprise, Arizona Tourism 5-Year Strategic Plan (2018)
- Meet Minneapolis Tourism Master Plan (2017)
- North Lake Tahoe Tourism Master Plan (2015)
- City of Austin Cultural Tourism Plan (2014)
- Vancouver Tourism Master Plan (2013)

The Plan review included a general synopsis of the Plan, a summary of Plan elements, an overview of the methodology and process used by the Plans, and a summary of the transportation elements within the Plan. A summary of the Plan review is included in this section.

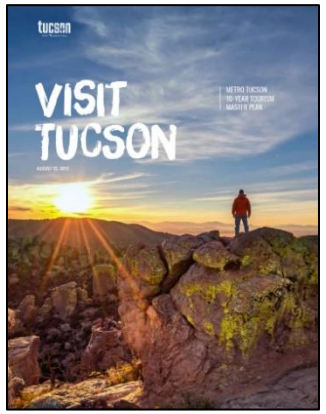
Most of the plans were created to function as guiding documents for tourism funding. Not every plan included a transportation element. However, common themes among the transportation elements included the following:

- An emphasis on **connectivity**
- **Bicycle** and **recreational transportation** tourism
- An identification of **infrastructure improvements**
- Enhanced **wayfinding** programs
- Emphasis on **walkability** and **active transportation** options, especially in downtown areas
- Improving **safety** or the perception of safety
- Use of **technology** to communicate wayfinding, traffic flow and event schedules

Visit Tucson 10-Year Tourism Master Plan

Year: 2019 | **Geography:** City

Synopsis: Developed a future vision for Metro Tucson as a destination.



Plan Elements: Overview, Goals, Vision, Visitor Summary, Master Plan, Priorities, Implementation

Methodology + Process: Stakeholder engagement, visitor survey, destination assessment, community survey, festivals and events analysis, visioning workshops, recommendations/roles and strategies, priorities and implementation.

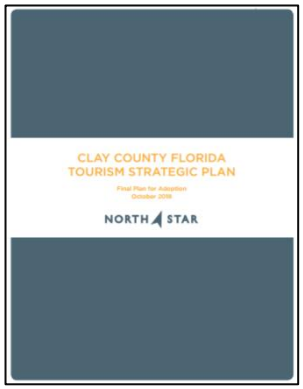
Transportation Elements:

- Connectivity identified as strategic area of focus. Includes: connectivity, accessibility, and proximity; airlift development, the Loop (biking).
- Biking tourism (road biking, mountain biking, competitive racing, recreational biking, biking The Loop).
  - Additional bike-related marketing and resources
  - Invest in infrastructure, trails, parks, and competition venues
  - Enhance signature riding events
- Improve basic infrastructure (including roads and highways)
- Future infrastructure opportunities: public transit, new highways, airport improvements, additional light rail services, high speed train service to Phoenix

Clay County Tourism Strategic Plan

Year: 2018 | **Geography**: County, Florida

Synopsis: Offers strategic recommendations for the future structure and program of work of tourism development and promotion in Clay County.



Plan Elements: Strategic Plan Process and Overview; Background Information and Situation Analysis; Mission, Vision, and Core Values; Recommendations.

Methodology + Process:

- Background information gathering and research (zip code analysis)
- Collaboration with Clay County and other stakeholders
- Community meetings
- Strategic Planning Group meeting

Transportation Elements:

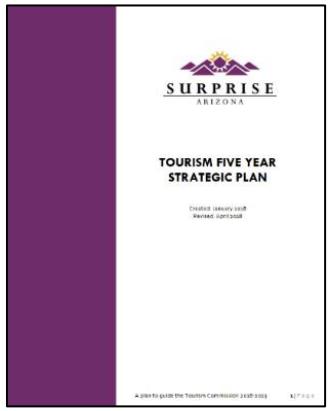
- Traffic/Traffic infrastructure/lack of easy visitor transportation systems and lack of wayfinding signage identified as some of Clay County's greatest tourism weaknesses
- Driving attractiveness noted in consultant's 'secret shopper' report. Road system in good shape, well maintained, and scenic drives.

Surprise, Arizona Tourism 5-Year Strategic Plan

Year: 2018 | **Geography**: City

A plan to guide the Tourism Commission 2018-2023

Synopsis: Provides guidance and direction for future efforts and funds aimed to increase tourism-related spending within the City, as well as measurements of its success.



Plan Elements/Methodology + Process: Evaluated current strategic plan and analysis, identified Focus Areas, defined Focus Areas, created goals for each Focus Area.

Transportation Elements: Did not include transportation elements.

Meet Minneapolis Tourism Master Plan

Year: 2017 | **Geography:** City

Synopsis: Tourism master plan with measurable goals to achieve by 2030.

Plan Elements: History, Investigation and Analysis, Existing Conditions and Tourism Potential Assessment, Saying Yes to Tourism, Eight Big Initiatives for 2030

Methodology + Process: Collaboration via steering committee, existing conditions assessment, tourism potential evaluation.

Transportation Elements:

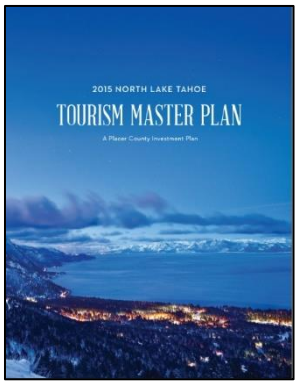
- Goal: Implement a unified, transportation, wayfinding and information program for Minneapolis.
  - Legible network of signs at the airport, along freeways, streets and sidewalks, bike trails, and skyways to city destinations.
  - Replace "Free Ride" buses to Nicollet Mall with a system of circulators like streetcars and water taxis.
  - Establish a real-time digital calendar of events, listings, openings, and other information.
- Goal: Adopt a comprehensive place-making plan.
  - Green, high-quality and consistently compelling walking experience along the sidewalks of downtown.
  - Develop a signature urban walkway.
  - Emphasize safety and perception of safety on downtown sidewalks.
- Identified challenges: Poor signage, limited transportation options within the metro area, perceived lack of safety on downtown sidewalks, lack of greening and other 'walkability' features on downtown sidewalks, lack of grooming along freeways and at entrance ramps to downtown.

North Lake Tahoe Tourism Master Plan

Year: 2015 | **Geography:** County

Synopsis: Provides a framework of tourism investment strategies to use the Transient Occupancy Tax (TOT) to transform North Lake Tahoe to become a more year-round destination. Current visitation is concentrated on weekends and peak holiday periods.

Plan Elements: Community Overview, Market Conditions, Funding Conditions, Vision, Goals + Priorities, Action Plan Matrix



Methodology + Process:

- Took place over 3 years
- Previous plans reviewed
- Visitor surveys
- Economic analysis
- Task Force with community leaders
- Workshops for public feedback

Transportation Elements:

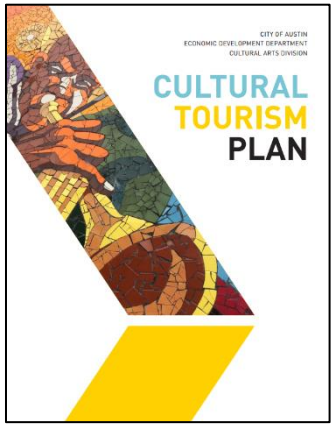
- Goal: Get people where they want and need to go while reducing congestion and dependency on the private automobile by developing and promoting a multimodal transportation network.
- Objectives:
  - Fund transit vision for "frequent, fun and free" service
  - Reduce congestion and improve traffic flow using point-to-point shuttles
  - Convenient connections, circulation, and pedestrian safety in commercial core area, town centers and neighborhoods
  - Use technology to communicate transit schedules and transportation opportunities
  - Invest in region-wide connections

City of Austin Cultural Tourism Plan

Year: 2014 | **Geography:** City

Synopsis: Establishes shared policy and strategy, implementation budgets, build community buy-in, help illustrate roles of each industry, create a cohesive voice, and call to action to work together to leverage both the creative and tourism industries.

Plan Elements: Overview, Research Findings, The Cultural Tourism Plan (Building Blocks, Strategic Growth Opportunities, Key Recommendations and Actions).



Methodology + Process:

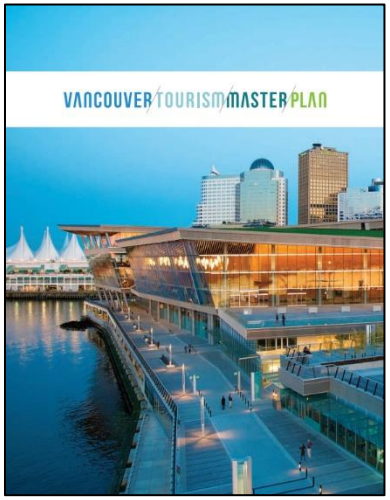
- Research and input to gain historical context
- Input and analysis to better understand contemporary landscape
- Analysis and strategy. Weave. Test. Complete.

Transportation Elements:

- None. Includes an "infrastructure" recommendation section, but does not include items for transportation.

Vancouver Tourism Master Plan

Year: 2013 | **Geography:** City



Synopsis: Provides specific recommendations for the policy and planning framework to ensure the tourism industry grows in a manner that is economically, socially, and environmentally sustainable.

Plan Elements: Background (Situational Analysis, Goals), Recommendations, Implementation

Methodology + Process: Stakeholder interviews, online community survey, situational analysis (assets, strengths, opportunities)

Transportation Elements:

- Digital visitor experience – mobile wayfinding
- Clustering tourism products in high traffic areas of the destination
- An efficient and effective visitor transportation network
- Lack of late-night public transportation
- Promote cycling tourism (public bike share)
- Rapid transit
- Ferries
- Centre City Transit Loop
- Taxis
- Walkability

2.0 Local Agency Outreach

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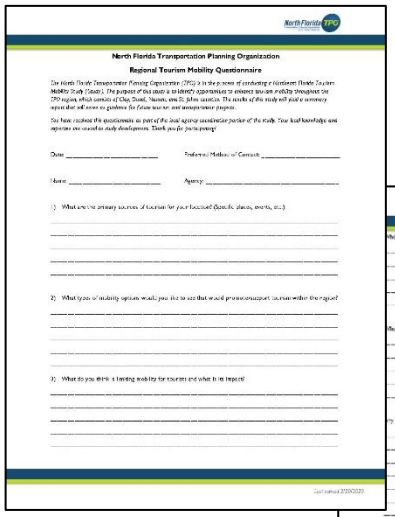
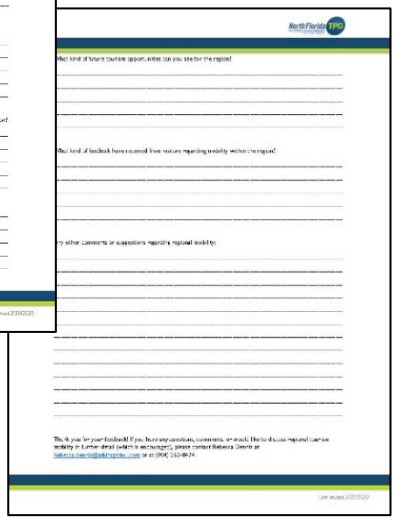
2.0 Local Agency Outreach

A local agency outreach component was included in this study as a method of determining the tourism mobility needs, goals and opportunities within the region. Local agencies contacted for input on this study included:

- Amelia Island Tourist Development Council
- Clay County Chamber of Commerce (Clay Chamber)
- Clay County Tourist Development Council
- Fernandina Beach Main Street
- Historic Coast Culture
- Jacksonville Chamber of Commerce (JAXChamber)
- Nassau Chamber of Commerce
- St. Augustine, Ponte Vedra, & The Beaches Visitors Convention Bureau
- St. Johns County Airport Authority
- St. Johns County Tourist Development Council
- St. Johns County Chamber of Commerce
- Visit Jacksonville
- Visit Keystone Heights
- Visit St. Augustine

Local agencies were contacted via email and phone calls to solicit input on the study. Additionally, a *Tourism Mobility Questionnaire* was developed and distributed to the local agencies. The goal of the questionnaire was to have a standardized set of questions to yield comparable information from the agencies. The results of the local agency outreach component are summarized in this section of the report. Notes from the phone calls and the completed questionnaires are included in the appendix.


North Florida Transportation Planning Organization
Regional Tourism Mobility Questionnaire



Tourism Mobility Questionnaire

2.1 Regional Tourism Trends

Needs for tourism mobility vary throughout the region by the types of tourists coming to the region and the experiences they are seeking. Based on the feedback received, some tourists are coming to the region to attend a special event which includes a higher density of people and higher volumes of traffic. Others come to the region to experience nature and rural activities. It is important to identify common tourism trends throughout the area to forecast mobility needs to help visitors efficiently travel throughout the region.

The following section summarizes the trends identified based on the information received from the phone calls and questionnaire.

Day Visitors versus Overnight Visitors

The transportation needs of day visitors are different than those of overnight guests at area hotels or resorts. There are complementary shuttles available at these facilities to transport guests to popular locations in the region such as Downtown Jacksonville, St. Augustine and Amelia Island. Ridesharing services allow these visitors to leave their cars and shuttle to special events and activities. Day visitors must contend with wayfaring and parking. The latter can be challenging and for special events they may be required to park at a remote location and ride a shuttle to their destination.

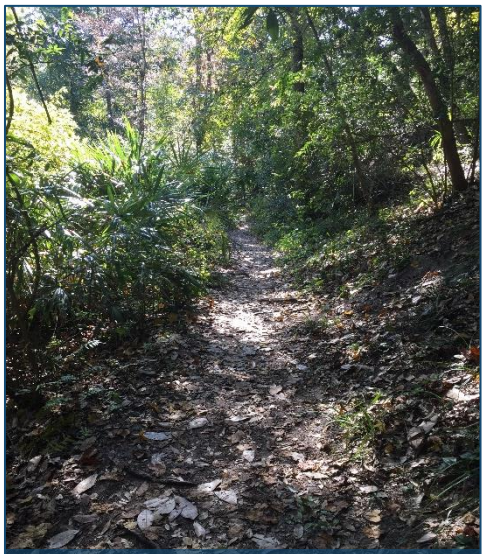
However, those people visiting the region for the day who are driving in from places like Gainesville need to have a place to park their car to attend events or other activities. Their options are to find parking at their destination or find another public lot to pick up a shuttle or other ridesharing service to their end destination.

Special Events

Special events such as The Players Championship (TPC), professional and amateur sporting events, and other cultural and seasonal events significant short-term influence on regional tourism. These events attract locals, day and overnight visitors to the region with a variety of transportation needs. Each county within the region hosts several special events throughout the year with a variety of attendance densities that should be considered when planning tourism mobility.

Ecotourism

Ecotourism is another popular attractor to the area. Ecotourists want to experience and observe natural environments. There are many opportunities to do so in the region, these include beaches, state and county parks, national preserves and forests, the St. Johns River, preservation areas, water management district lands, and other natural environments. The needs of the people coming to the region to experience the natural environments differ from those that may be coming to attend special events.



Hiking trail, Gold Head Branch State Park. Source: Study Team.

Rural Driving

Another trend identified for the region is the popularity of driving on the rural roads and scenic highways. It was particularly noted that tourists enjoy the drive along SR A1A between Ponte Vedra and St. Augustine as well as the rural roads through Clay County.

2.2 Regional Tourism Needs

In addition to regional tourism trends, regional tourism needs were identified through the local agency outreach. The regional needs identified are summarized in this section.

Wayfinding System

A completely redesigned wayfinding system throughout the region was a common theme mentioned in the local agency outreach. A wayfinding system is signage directing travelers to regional destinations. Another recommendation was to include the distance or general travel times to destinations within the region. The reasoning is that there is a perception that destinations are further than they actually are. For example, Green Cove Springs is about a 30-minute drive from St. Augustine.

Trailhead wayfinding signage, St. Johns County. Source: Study Team.

Special Events Traffic Management Guidance

Special events are a common occurrence throughout each county within the region. However, there is an identified lack of guidance of how to manage traffic flow for these events.

Connectivity

Connectivity among counties, attractions, and transportation systems is another need within the region. Vehicular connectivity is already being improved with projects such as the First Coast Expressway (SR 23) which provides a connection from I-10 in Duval County through Clay County ultimately connecting to I-95 in St. Johns County.

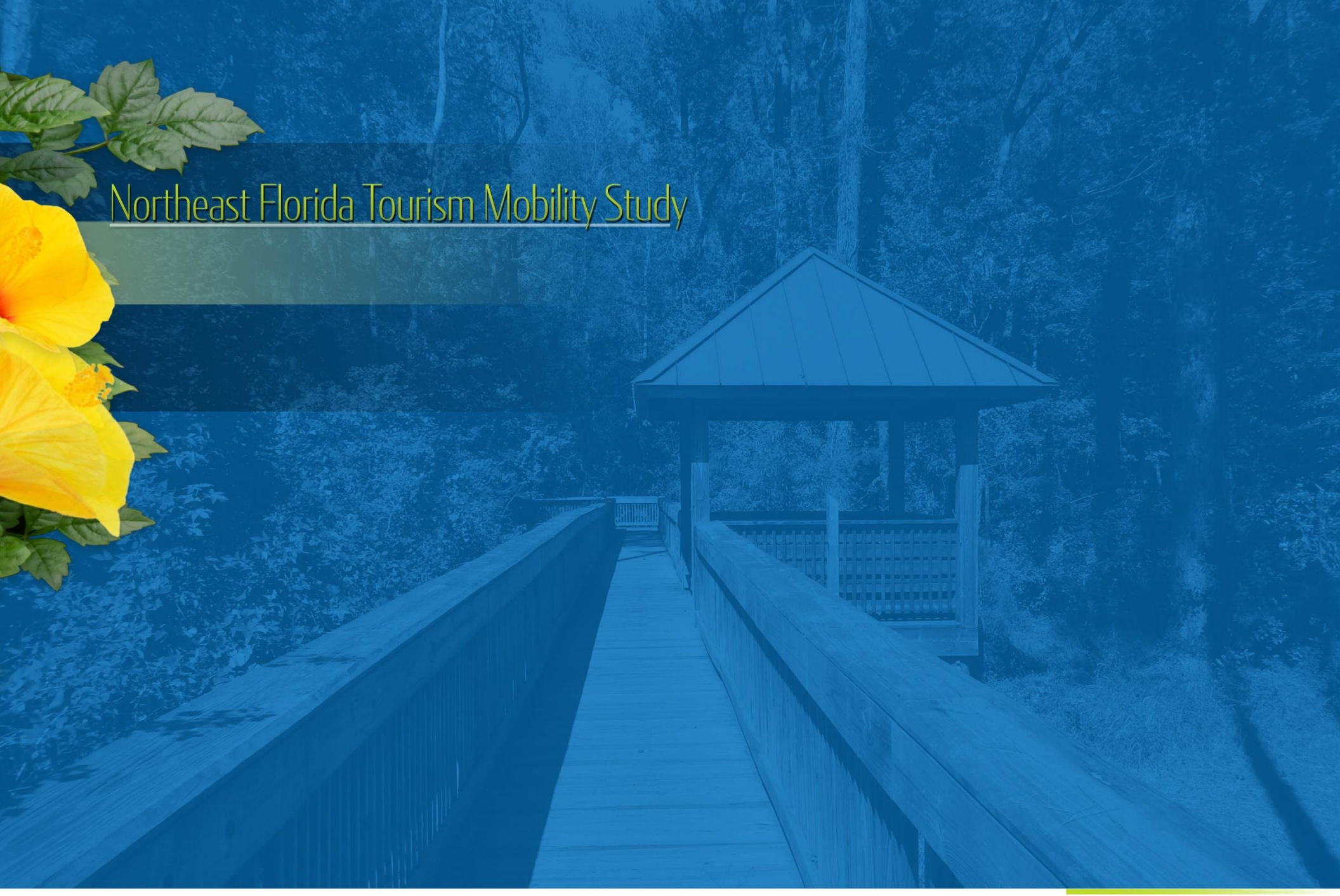
Other connectivity improvements specified included filling the gaps of the regional trail system, to provide recreational and active transportation opportunities for visitors and residents. This could also improve linkage to regional park systems.

Regional Transit Rail System

Historically, there has been an identified need for a rail system between downtown Jacksonville and other regional destinations such as St. Augustine and Orange Park. Fortunately, a regional rail system is a TPO priority and is included in the 2045 Long Range Transportation Plan (LRTP). More information about this project is detailed in Section 1.2 Existing and Planned Projects.

Parking Creation/Identification for Day Visitors

Some public parking is available for people visiting the region for the day. However, there is a disconnect of communication and identifying of where appropriate public parking facilities are located. There is a need to more clearly identify and direct travelers to available parking opportunities.



3.0 Opportunity Identification

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3.0 Opportunity Identification

Based on information obtained throughout the study process, opportunities were identified for further study to enhance tourism mobility throughout the region. Many are recommendations made by the local agencies. These opportunities include:

- **Regional Destination Wayfinding System**
- **Special Events Traffic Management Guidance**
- **Intelligent Transportation System (ITS) Opportunities**
- **Ecotourism Connectivity**
- **Regional Rail Opportunities**
- **Medical Tourism**

Further details of these improvements and examples of how these improvements have been implemented in other areas are provided in this section.

3.1 Regional Destination Wayfinding System

A common theme throughout the study process was the perception that regional destinations are further from one another than they actually are. It would be beneficial for new travelers to the area to be more aware of the distance and general travel times between locations. How far is St. Augustine from Jacksonville? Or Fernandina Beach from Ponte Vedra? Where are the designated scenic highways?

Wayfinding and event management enhancements are included in *Smart North Florida*. These enhancements will include roadside kiosks and smart phone apps to communicate information to visitors. However, in addition to the *Smart North Florida* enhancements, having an enhanced **Regional Destination Wayfinding System** providing more information about popular destinations including general travel times would benefit the region. Community wayfinding signage enhances the visitor experience by improving the ease of navigation the region. Visitors are likely to become more comfortable driving, biking, or walking an unfamiliar area when properly guided. A wayfinding system is meant to help people orient themselves and ultimately enjoy a more informed experience. A coordinated, logistically placed wayfinding system demonstrates the concern for landscape and welfare of visitors, reflects the region's hospitality, and helps to define place and community.

A wayfinding system uses symbols and color-coded signs for different types of attractions. For example, blue signs can be used for water-related activities, red signs for civic facilities, and purple for downtown and shopping districts. Signs can also denote different areas, neighborhoods, or parking locations.

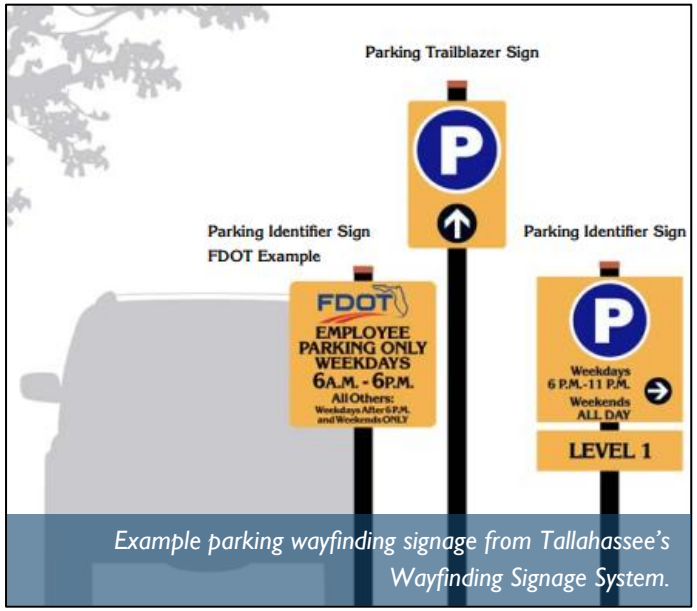
Examples of developing and implementing a wayfinding system plan:

- **City of Marshalltown, Iowa**: Started the planning process in the March of 2018 to improve wayfinding opportunities within Marshalltown. The *Wayfinding Master Plan* was adopted in October 2018 with an emphasis on Entry Monument Signage, Civic/Building/Property Signage, Community and Neighborhood Park Signage, and Directional and Parking Lot Signage. The plan was developed in coordination with the project team, city staff, and steering committee participants.

- **City of Alexandria, Virginia**: Established a *Wayfinding System Design Guidelines Manual* in 2010 as the result of a visitor's center completed in 2003 noting the need to substantially improve or create a signage and wayfinding system. The study found that informational and directional signage was a critical city weakness, and if visitors were to

learn what Alexandria has to offer, lengthen their visits, as well as visit again, wayfinding improvements were needed.

- **City of Tallahassee, Florida:** Developed *The Wayfinding Signage System* in 2014 as a response to critical needs and policy recommendations. Included in the city's *Action Plans for Placemaking*, the city and county supported developing the wayfinding signage system to promote neighborhood revitalization through "Sense of Place" initiatives. Plan developed through inter-agency collaboration and public input.



Example parking wayfinding signage from Tallahassee's Wayfinding Signage System.

- **City of North Lake Tahoe, California**: Establishing a Wayfinding Plan with the goal of 50 signs installed by 2016 pointing to downtowns; historic, scenic and recreation sites; and photo opportunity locations was included in goals and objectives of their 2015 Tourism Master Plan. Developed a *Wayfinding Design Guidelines Manual* and *Location Master Plan* as part of implementing of the Wayfinding Plan.

The wayfinding system was developed collaboratively with a City Working Group including stakeholders from city departments, a Stakeholder Advisory Group, community outreach, and official review with both Boards of Architectural Review, the Planning Commission and City Council.

- **Town of Mountain Village, Colorado:** Created a new, comprehensive sign design plan in 2016 as a response to a general lack of appropriate design and signage options. Utilized a multi-step processing involving a stakeholder group in combination with staff and Town Council to define and approve design standards.

Example wayfinding signage from Town of Mountain Village Sign Design Plan.

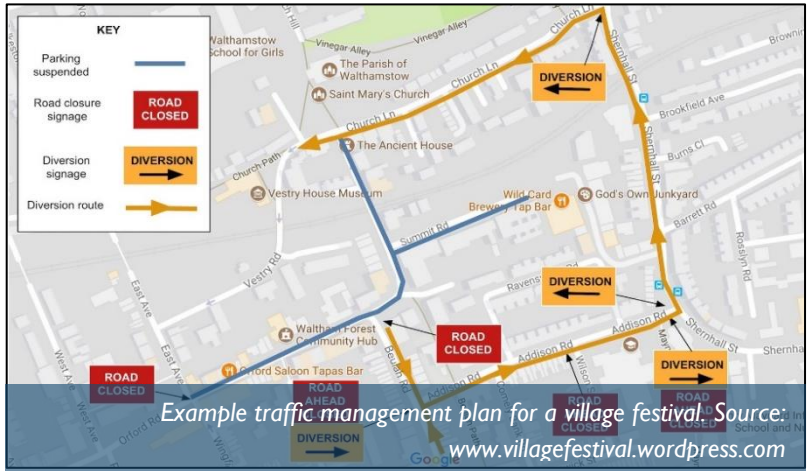
3.2 Special Events Traffic Management Guidance

Special events are common throughout the region. Special events can cause overcrowded primary routes, as people see these as the fastest and easiest way to reach their event destination. However, this tends to have a negative impact on local traffic and traffic flow. The purpose of special events traffic management is to reduce congestion on all roads surrounding an event facility to improve travel times for the event attendees and other drivers on the road.

Enhancing the management of special events is currently included in *Smart North Florida* in the form of sensors to collect and provide transportation data and routing information via 511 and third-party app developers.

However, additional guidance for how to effectively navigate Special Event traffic would provide benefits to residents and travelers to events. There is an opportunity to create a regionally-specific **Special Events Traffic Management Guide** that can be utilized by municipalities and others throughout the region. Some examples of Special Events traffic management include:

- **Federal Highway Administration (FHWA) Guidance**: The FHWA has published several guiding documents on the subject of Special Events Planning and Event Operations planning. These documents include a *Managing Travel for Special Events Handbook* and *Fact Sheet* (full documents are included in the appendix). These guiding documents provide information regarding special events such as:
  - Risk Assessment and Contingency Planning: Demonstration or protest at politically or socially controversial events; fan celebration after team championship victory; event security.
  - Feasibility Studies: Gauges the impact of proposed events on traffic and parking operations; assists in the decision-making; serves as input to traffic management plan and developing mitigation strategies.
  - Traffic Management Plan Components: Traffic flow route planning; site access and parking planning; pedestrian access planning; traffic control planning; travel demand management and transit service planning; incident management and traveler information.
  - Decision Maker's Role in Event Operations Planning: Including the role in the special events planning and the responsibility to the community.
  - Implementation Activities: Traffic plan deployment.
  - Day-of-Event Activities: Organizing the traffic management team, managing day-of-event operations, and traffic monitoring needs.
  - Post-Event Activities: Evaluate local and regional operations based on stakeholder debriefings and an analysis of traffic data collected on the day-of-event.



Example traffic management plan for a village festival. Source: www.villagefestival.wordpress.com

- **Texas A&M Transportation Institute Best Practices:** A best practices component for Special Event Management was included as part of traffic management plan for congestion mitigation for the Texas A&M University System. Their best practices for Special Event Management is summarized below. The complete document is included in the appendix.
  - Type of Location: Medium and large events; events in constrained areas.
  - Agency Practices: Coordinate and collaborate between several groups; monitoring and response during the event.
  - Frequency of Reanalysis: Plans should be revisited for each event based on projected situations and participant volumes. Participants and agencies should also be debriefed after each event to glean information to be used for future event planning.

  - Supporting Policies or Actions Needed: Identify potential opportunities to expand public transportation services to meet travel needs; roadway operations agencies that can address unique demands.
  - Complementary Strategies: A variety of traffic management and transportation option strategies may be useful.

3.3 Intelligent Transportation Systems (ITS) Opportunities

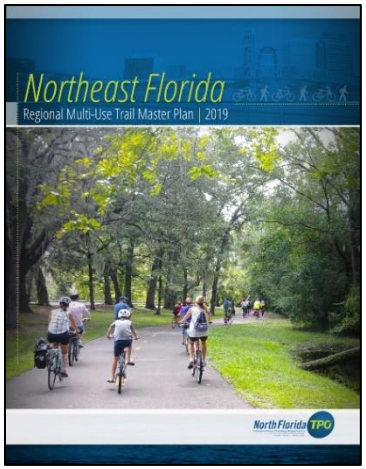
According to the USDOT, Intelligent Transportation Systems (ITS) technologies promote transportation safety and mobility by integrating advanced communications technologies into transportation infrastructure and vehicles. *Smart North Florida* has several ITS strategies and implementation plans. *Smart North Florida* should continue to be supported and implemented throughout the region as several strategies enhance tourism mobility.

- **Electric Autonomous Shuttles**: Implemented by the U2C program through JTA
- **First and Last Mile Connections**: Connecting transit and various other transportation sources such as Lyft, Uber, AV shuttles, and bike and car sharing to provide options for those visiting the region.
- **North Florida Traffic App**: Provides visitors with traffic and routing information to more efficiently navigate the roadways.
- **Pedestrian Sensors**: Enhances safety for pedestrians traveling within the region.
- **Public Broadband Network**: Broadband wireless will enable internet-based features such as wayfinding kiosks and other ITS opportunities for visitors.
- **Smart Parking**: Parking lot occupancy data will show parking availability and enable payment via smartphones and kiosks to allow visitors to find parking faster and simplify the payment system.
- **Special Event Traffic Management System:** Sensors will collect and provide transportation and routing information to visitors and residents.
- **Wayfinding and Event Management:** Roadside kiosks and smart phone applications will provide information for residents and visitors to navigate events.

3.4 Promote Ecotourism and Connectivity

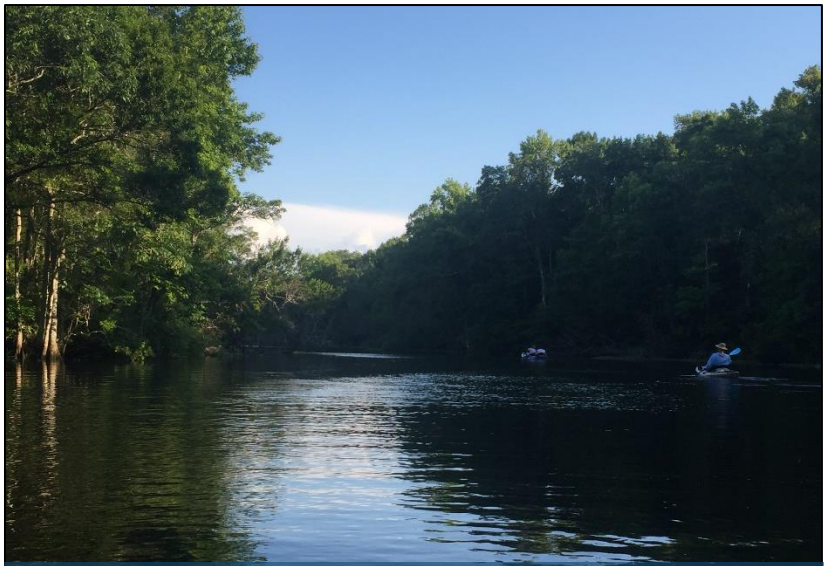
To further facilitate the growing ecotourism demands throughout the region, additional connectivity between the parks systems, natural lands, and trail systems would be beneficial. Ecotourism can provide the foundation for economic opportunities in rural communities. Creating opportunities for connecting outdoor activities such as hiking, biking, water recreation and other outdoor activities will serve visitors and locals alike. This can be achieved by the following options:

- **Regional Trail Network**: Continuing to fill the gaps in the bicycle trail network and implementing the *Northeast Florida Regional Multi-Use Trail Master Plan*. Approximately 570 miles of proposed trails are identified in this plan across the four-county TPO region. Trails identified in this plan are limited to off-road, paved trails connecting to larger trail networks, trails that make cross-county and cross-state connections or trails that otherwise serve the region.



  Providing a connected trail system will provide alternative and active modes of transportation throughout the region while providing additional destination and recreational opportunities.

- **Ecotourism Needs Study**: In order to effectively promote ecotourism mobility and connectivity, it is important to identify which regionally-specific mobility options will best suit the area. Is there a lack of parking at these recreation areas? Is there a lack of travel mode options and infrastructure between ecotourism opportunities? What other barriers or opportunities can be identified to further serve the needs of ecotourism? Conducting an Ecotourism Needs Study with a focus on mobility will identify additional opportunities to improve ecotourism and connectivity throughout the TPO region.



Trout Creek, St. Johns County. Source: Project Team.

3.5 Regional Rail System

A rail system connecting downtown Jacksonville to other major regional destinations such as St. Augustine has also been recommended. Implementing this rail system is included in the 2045 LRTP. Continued support and developing of this rail system will enhance tourism mobility throughout the region.

3.6 Medical Tourism

Northeast Florida has an extraordinary network of high-profile healthcare facilities which attracts medical professionals and patients to our area. Few American cities of any size are home to so many facilities, among them Ackerman Cancer Center, Baptist Health, Brooks Rehabilitation, Mayo Clinic, Memorial Hospital, Nemours Children's Clinic, St. Vincent's HealthCare, UF Health Jacksonville, UF Health Proton Therapy Institute and Wolfson Children's Hospital, to name only a few.

Jacksonville's health care providers continue to see expansions throughout the region, helping cement the area's status as a medical tourism destination and meeting location for medical professional.

Mayo completed a "destination medical facility" in Jacksonville, partially funded with a $20 million grant from the South Florida-based Harry T. Mangurian Jr. Foundation. A new Baptist MD Anderson Cancer Center has recently opened, St. Vincent's is working on a new $55 million facility in Riverside, and Flagler Hospital and Baptist Hospital both began working on medical facilities in Nocatee.

In response, Visit Jacksonville launched a new medical meetings initiative, and is already participating in trade shows, developing medical meetings collateral and advertising in medical meeting publications in preparation.

4.0 Conclusion

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4.0 CONCLUSION

As a result of the Existing Conditions Analysis and Needs Analysis, a set of proposed corridor improvements was developed. The proposed corridor improvements are summarized in this section. They are presented as short term, mid-term, and long-term recommendations. Additionally, planning-level cost estimates are provided for the proposed improvements.

Study Disclaimer: This study was conducted from January 2020 through April 2020. The COVID-19 outbreak may have impacted feedback received during the study process.

Vilano Beach. Source: Project Team.