a report on

FLORIDA TRANSPORTATION TRENDS AND CONDITIONS

TRAVEL DEMAND
Tourists and Visitors

FDOT

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Introduction

Understanding tourist or visitor travel trends is important in comprehending traveler needs and behaviors as well as predicting future travel demands. Visitor travel has different temporal and geographic distributions than resident and freight travel. Visitor travel demand can also follow a different growth pattern than resident or freight travel, as has been the case over the past few decades in Florida, where tourist travel first outpaced the growth in resident travel but more recently appears to have lagged behind resident travel growth. Understanding the significance of tourist/visitor travel is relevant to a variety of policy considerations. Tourism is a critical element of Florida's economy and, as such, Florida strives to accommodate tourists' travel needs. Knowledge of tourism may have an impact on the geographic allocation of investments and on facility planning, design, and operation. A good understanding of visitor travel has implications on safety, traveler security, signage, and other aspects of how transportation facilities and services are provided. Tourism levels may influence policies on how to fund transportation infrastructure and service investments in the most equitable and efficient manner.

While tourism has many positive impacts on local economic development, tourism can also result in negative impacts on the environment of the host areas. Some of these negative impacts include increased air pollution caused by tourists driving automobiles, increased congestion on roadways, and involvement in traffic accidents and fatalities.

Understanding the significance of tourist/visitor travel is relevant to a variety of policy considerations.

As transportation planners have begun to develop a richer understanding of freight travel in recent years, it is equally appropriate that tourist and visitor travel garner similar attention, particularly in Florida, where tourist travel comprises a meaningful share of total travel on the transportation system. Data from the University of South Florida Center for Urban Transportation Research estimates that visitors account for about 7.5 to 8.2 percent of all vehicle travel in the state.

The estimated annual number of visits to Florida by non-state residents increased from 73.9 million in 2002 to 87.3 million in 2011 in Florida. This is an increase of over 18 percent during this 10-year period. Such high volume and high growth of visitors are often cited when transportation problems in Florida are the topic. Since 2000, there has been greater uncertainty in tourism levels and some evidence of changes in tourist travel behavior. Factors that have impacted tourism include economic conditions both domestically and in countries that many of Florida's international tourists call home, security considerations, international exchange rates, hurricane activity, major events in Florida, changes in airline capacity and costs, and the rising and fluctuating costs of fuel.

Unexpected events can often have profound impacts on the number of tourists visiting Florida. In 2010, the BP oil spill affected the entire Gulf Coast and prompted some tourists to cancel vacations to Florida. It was reported that Florida hotels had 50 percent of their reservations canceled due to the spill. The theme park industry similarly affects tourism in Florida. In 2010, Universal Orlando's Islands of Adventure opened the highly anticipated Wizarding World of Harry Potter, boosting the park's 2010 visitor numbers by 30 percent (Themed Entertainment Association 2010). In 2011, Legoland opened in Lakeland, attracting at least 4,000 visitors to the park on opening day (*The Ledger* 2011). Construction of additional rides and attractions encourages visitors to come to Florida and perhaps stay longer.

Special events also play a role in tourism travel. In July 2011, NASA launched its final space shuttle, a landmark event that drew an estimated 750,000 to 1,000,000 people who watched the final launch (*National Geographic* 2011). The end of space shuttle flights may change visitor activity in the Cape Canaveral area.

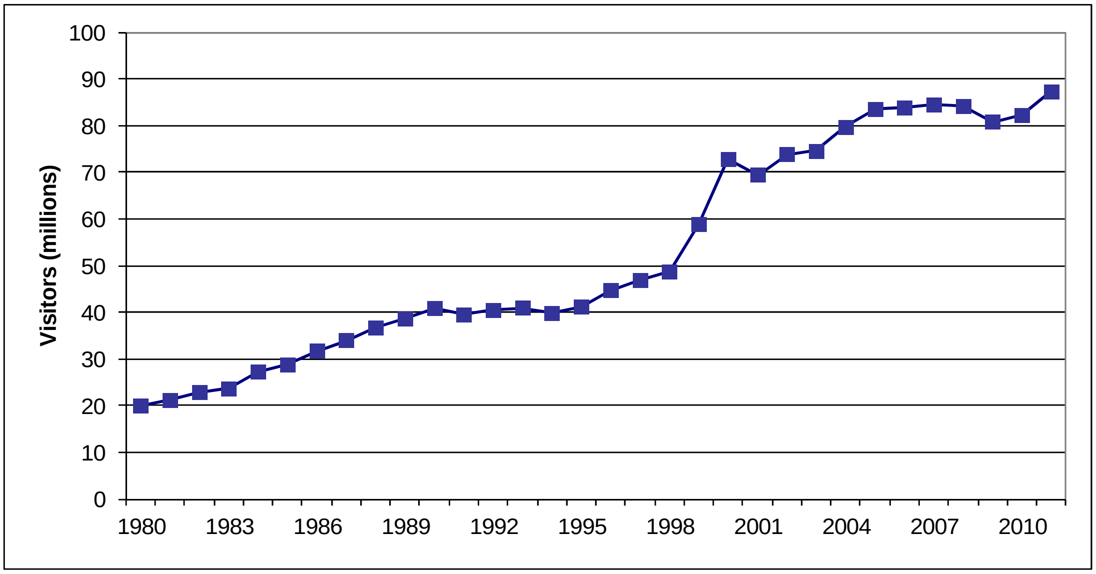
Air travel to new markets is also influencing tourism. New charter flights are being operated to Cuba, opening new opportunities for travel. Tampa International Airport, for example, estimates that the new service will generate nearly 40,000 trips to/from Cuba per year (Meinhardt 2012).

These factors, coupled with some underlying demographic changes, fundamentally alter the extent of competing tourist and visitor venues, domestically and internationally. As a critical aspect of both the economy and a direct source of significant travel demand, tourism merits scrutiny, as there may be some fundamental changes in historic patterns taking place.

Visitor Estimates and Characteristics

Visit Florida conducts the Florida Visitor Study annually to monitor tourism trends. In mid-1999, Visit Florida redefined its data collection method to better capture tourist numbers. This methodological change resulted in the dramatic increase of the trend in 1999 and 2000 (Figure 1). The 2001 datum indicates the impact of September 11 and the slowing economy. However, there was a resumption of the upward trend in visitors to Florida in 2002, and the trend has been steady, except for a minor decline in 2009, which can be attributed to the slowing economy and another methodology change in data collection.

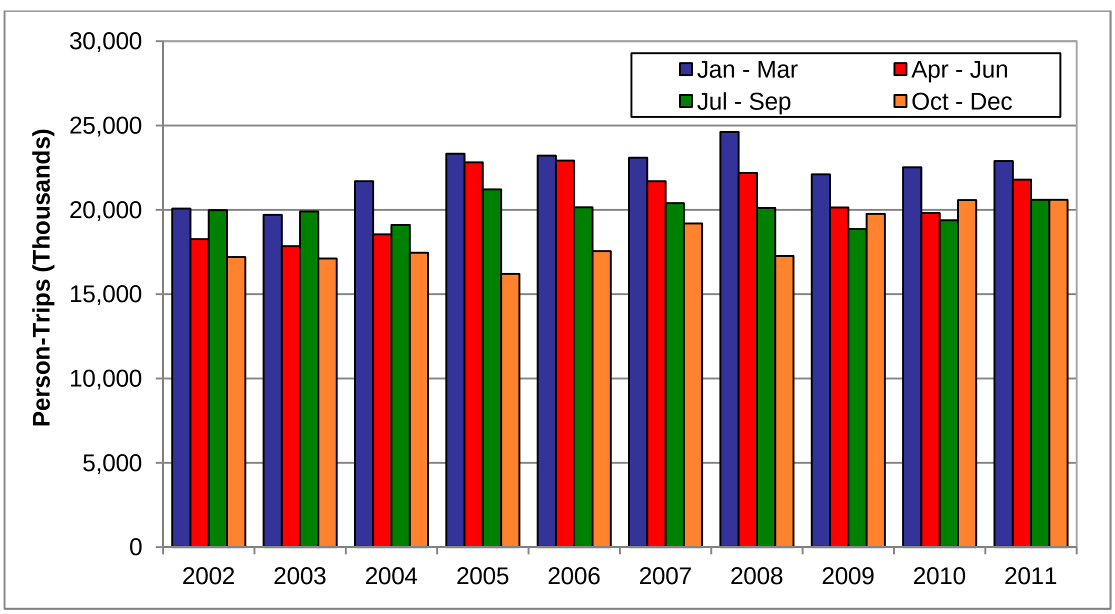
Figure 1 – Estimated Visitors to Florida, 1980-2011



Note: New visitor estimation method was adopted in July 1999 and updated again in 2009.
Source: VISIT FLORIDA, *Florida Visitor Study*, 2010 and http://media.visitflorida.org/research.php

Figure 2 presents in greater detail the impacts of the recent economic downturn and the subsequent recoveries. One advantage of the Florida tourism industry is Florida's climate. As a result, tourist travel has historically remained relatively evenly distributed throughout the year. This is helpful in that it lessens tourist-related peaking and associated congestion and enables more efficient use of the transportation system.

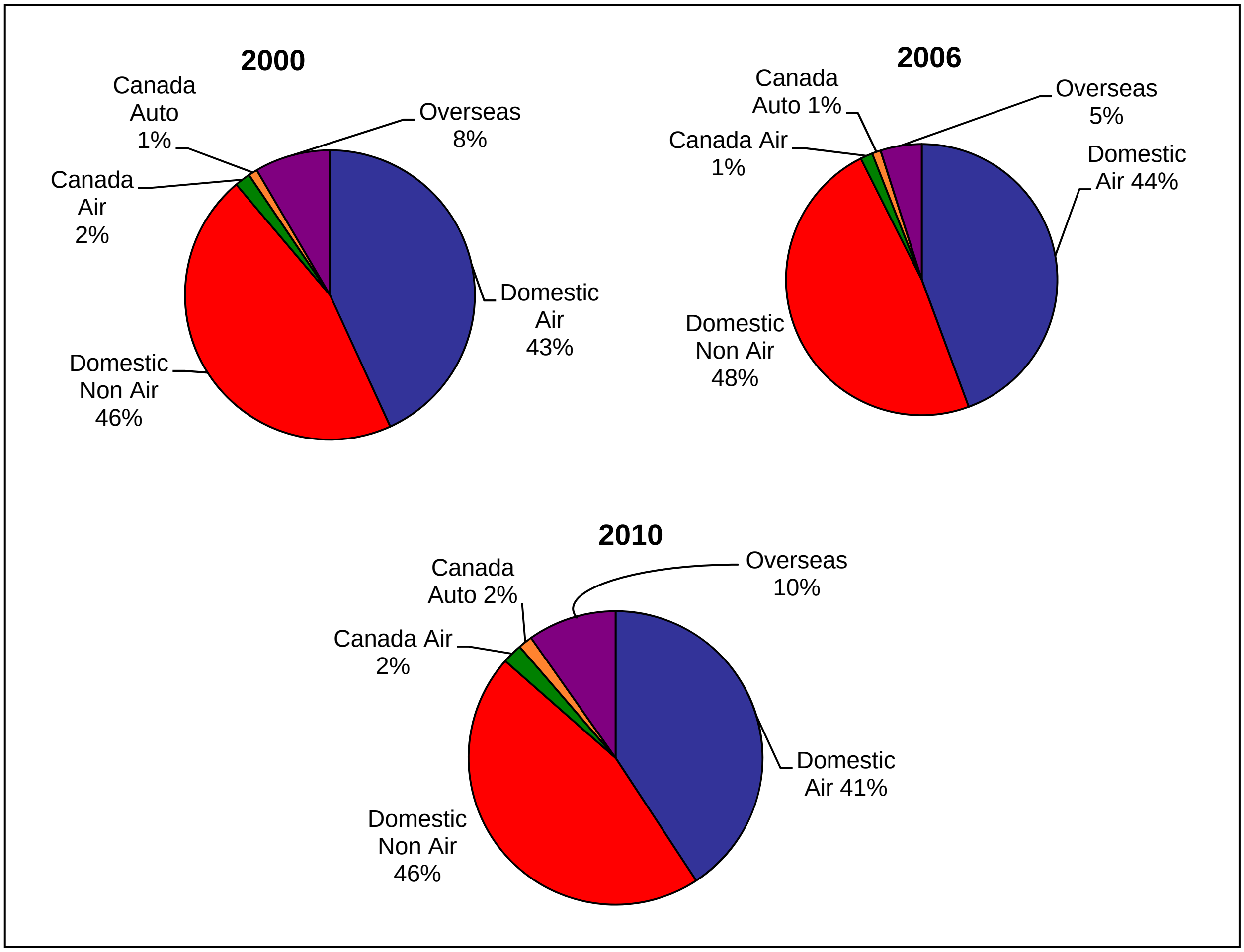
Figure 2 – Seasonality of Visitors to Florida, 2002-2011



Source: VISIT FLORIDA, *Florida Visitor Study,* 2010 and http://media.visitflorida.org/research.php

The source and means of access to Florida by out-of-state visitors is presented in Figure 3. The means of arrival has some clear implication in terms of the modal infrastructure (airports versus freeway/toll way system). Domestic travelers account for 87 percent of total out-of-state tourists. When coupled with Florida resident tourism, it is clear that the vast majority of tourism destined for Florida originates in the United States.

Figure 3 – Percentage of Visitors to Florida by Type, 2000, 2006, 2010



Source: VISIT FLORIDA, *Florida Visitor Study,* 2010

Airport security increased the time and perceived risk of air travel after 2001 and temporarily altered tourist travel patterns. Tourists preferred shorter distance trips than in prior years, making them more amenable to auto travel. Overseas air travel and Canadian air travel each declined in share, with domestic auto and air picking up the market share from 2000 to 2006. However, since 2006, overseas air travel and Canadian air travel have both increased to levels just above those in 2000. The fundamental restructuring going on in the airline industry, the cost increases, changes in exchange rates, and changes in air travel capacity may impact the relative appeal of air travel options in the future.

Table 1 and Table 2 show the originating location for visitors to Florida in 2010. In 2010, there were 8 million overseas visitors to Florida, an increase of 15 percent over 2009. The greatest percentage of these visitors was from the United Kingdom. The leading origin states for domestic visitors in 2010 were Georgia and New York. Domestic visitors arriving by automobile typically originate from neighboring states in the southeastern portion of the country. Visitors arriving by air come from all over the country but with a high concentration from the northeast. Those driving into the state often have significant mileage on Florida roads before reaching their destination(s) within the state.

Table 1 - Top 10 Overseas Origin Countries for 2010 Visitors to Florida

Country	Percent of Total
United Kingdom	16.1%
Brazil	13.3%
Mexico	4.1%
Germany	3.8%
Colombia	3.4%
Venezuela	3.3%
Argentina	3.3%
France	3.1%
Spain	3.1%
Japan	2.8%
Total	8,032,000

Source: VISIT FLORIDA, *Florida Visitor Study,* 2010

Table 2 – Top 10 Domestic Origin States for 2010 Visitors to Florida

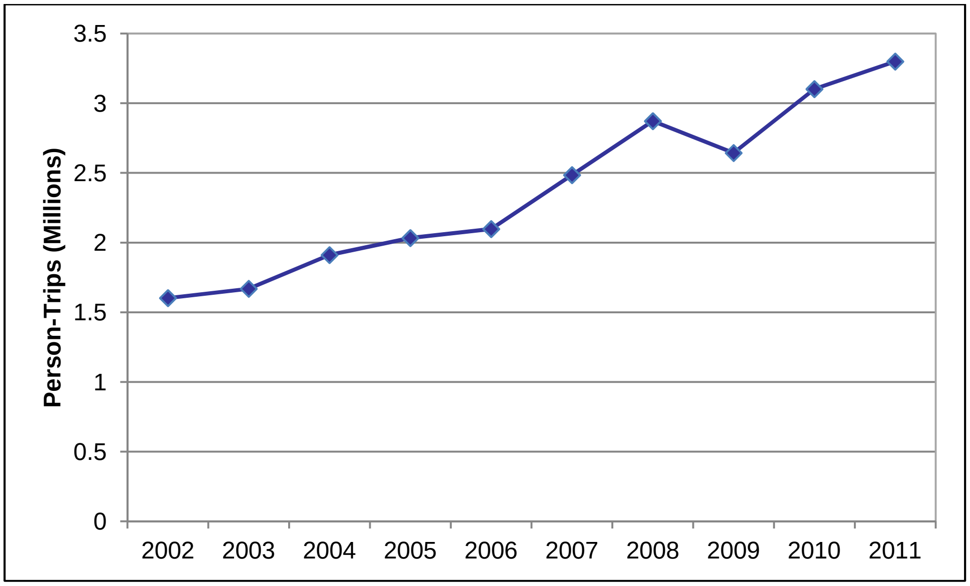
Rank	Air	Auto	Total
1	New York (11.3%)	Georgia (18.9%)	Georgia (11.3%)
2	Illinois (8.6%)	Alabama (7.2%)	New York (7.7%)
3	California (7.3%)	North Carolina (6.9%)	Illinois (6.4%)
4	New Jersey (6.4%)	South Carolina (6.6%)	North Carolina (5.5%)
5	Texas (6.0%)	Tennessee (5.2%)	New Jersey (5.5%)
6	Pennsylvania (5.4%)	Michigan (4.9%)	Texas (4.8%)
7	Virginia (4.7%)	Ohio (4.9%)	Michigan (4.6%)
8	Michigan (4.6%)	New York (4.5%)	Pennsylvania (4.2%)
9	Massachusetts (4.5%)	Texas (4.0%)	Ohio (4.2%)
10	Ohio (3.7%)	Illinois (3.9%)	Alabama (4.2%)

Source: VISIT FLORIDA, *Florida Visitor Study,* 2010

Tourists travel to Florida by an approximately equal combination of air and auto modes, with a slight increase in air travel in recent years.

Figure 4 shows the history of Canadian visitor trends for Florida. Since 2002, there has been a rise in Canadian visitors to Florida except for a slight decline from 2008 to 2009. Canada is Florida's leading international market.

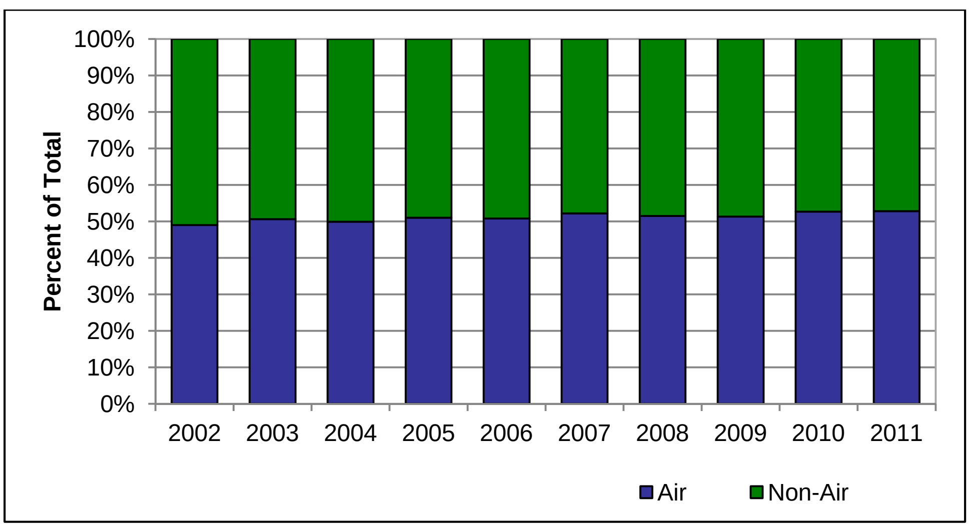
Figure 4 – Canadian Visitors to Florida, 2002-2011



Source: VISIT FLORIDA, *Florida Visitor Study*, 2010 and http://media.visitflorida.org/research.php

Air arrival share from 2002–2011 is presented in Figure 5. It can be seen that the share of air visitors to Florida has remained relatively stable.

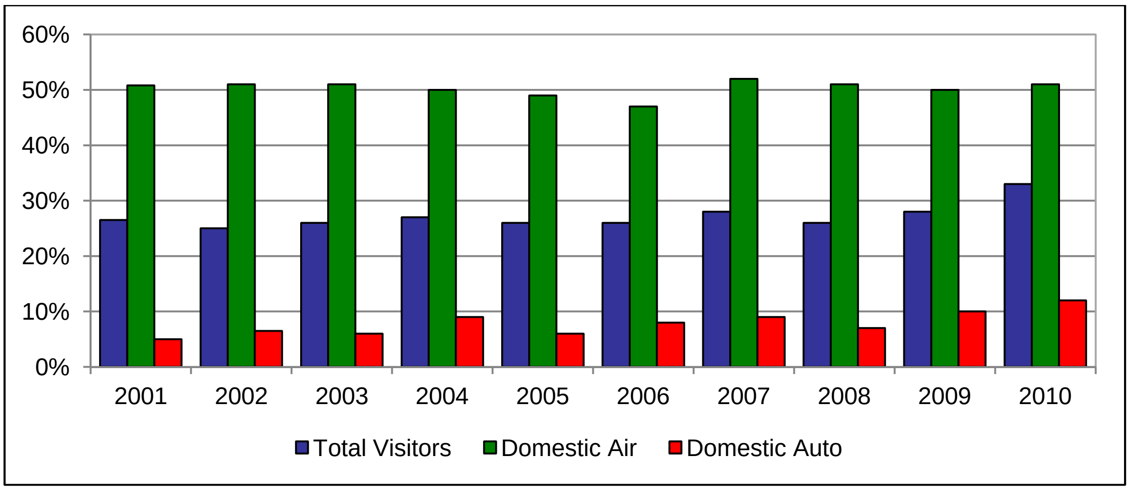
Figure 5 – Share of Air and Non-Air Visitors to Florida, 2002-2011



Source: VISIT FLORIDA, *Florida Visitor Study*, 2010 and *http://media.visitflorida.org/research.php*

Travelers arriving in Florida by air are not captive to public modes of travel on arrival. The data in Figure 6 suggest that nearly half of the tourists who arrive by air rent cars for local intrastate travel while in Florida. Some domestic travelers drive to Florida in rented cars from their home state. Others might drive to Florida in a carpool but rent additional autos in order to participate in different activities requiring multiple vehicles.

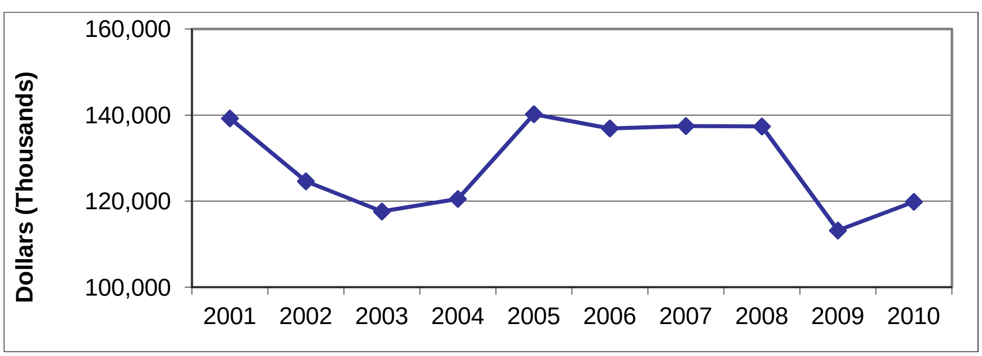
Figure 6 – Percent of Visitors to Florida that Rented Cars, 2001-2010



Source: VISIT FLORIDA, *Florida Visitor Study,* 2010

Figure 7 presents data on auto rental fees collected in Florida. This is a surrogate measure of rental car activity, as the fee is based on rental days of activity. As such, car rental surcharge revenue collections are impacted by lengths of stay and group sizes (Bigger travel parties may mean more car rentals for a given number of visitors). To the extent that domestic tourists tend to travel to Florida by a personal car, one would anticipate downward pressure on demand for rental vehicles.

Figure 7 – Car Rental Surcharge Collections, 2001-2010

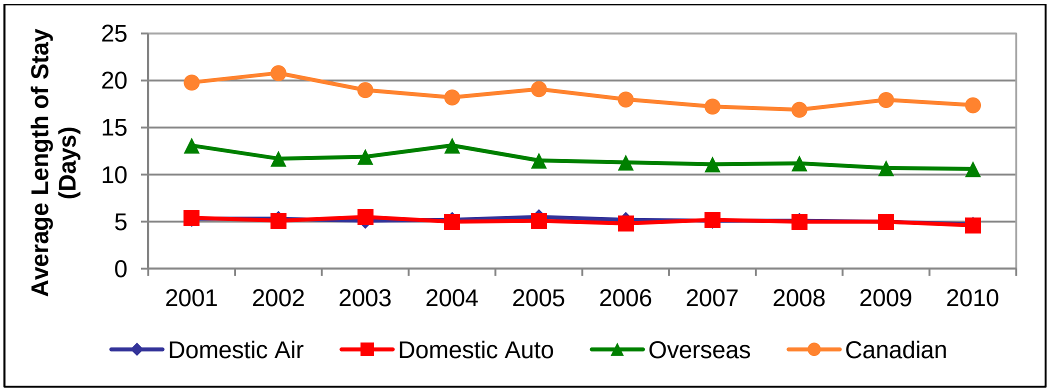


Note: The rental car surcharge is a $2 per day for the first thirty days of a rental or lease of a vehicle.

Source: VISIT FLORIDA, *Florida Visitor Study*, 2010

Figure 8 indicates that travelers are making slightly shorter vacation trips than in prior years. This is consistent with national trends toward more frequent and shorter vacations. This trend increases total travel demand and is facilitated by relatively modest costs for both air and auto travel in recent years (pre-2007, compared to historical travel cost levels).

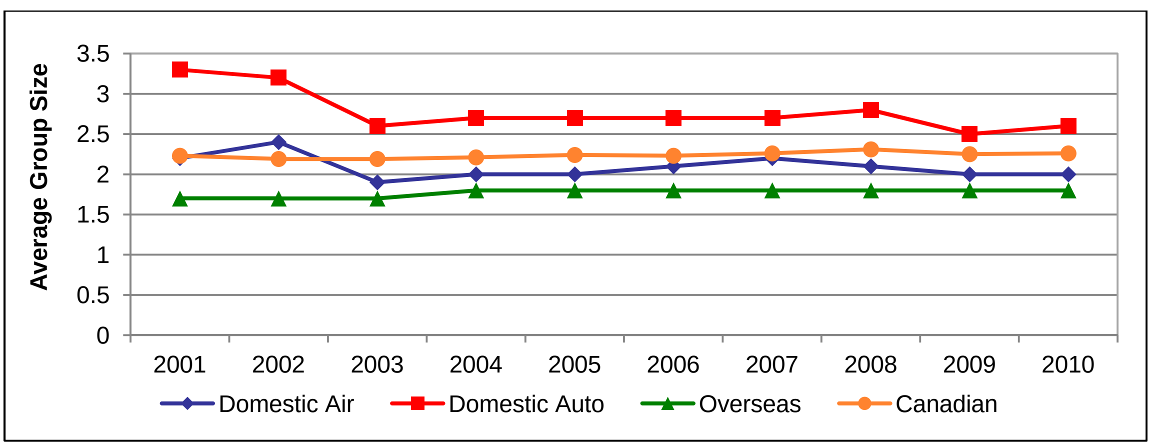
Figure 8 – Average Length of Stay by Visitor Type, 2001-2010



Source: VISIT FLORIDA, *Florida Visitor Study*, 2010

Figure 9 shows group size trends. Increases in group size favor the auto travel mode, which has no marginal cost for additional passengers. Florida's appeal to families/groups and the trend toward combined personal business and family vacation travel contribute to larger group size; however, the overall trend is down slightly - perhaps impacted by fuel prices, underlying demographic trends in household size and financial pressures on larger family groups.

Figure 9 – Average Group Size by Visitor Type, 2001-2010



Source: VISIT FLORIDA, *Florida Visitor Study*, 2010

In addition to tourist travel by visitors to Florida, Florida's substantial population created demand for tourist travel as well. Figure 10 shows the trends in Florida resident tourist travel. Resident tourist travel is governed by the size of the population and the economic conditions. Generally, leisure travel is highly related to disposable income. Thus, as personal income changes, one expects that the total amount of leisure travel by residents and out-of-state visitors would also change. Post September 11, tendencies for persons to vacation closer to home may have contributed to greater in-state tourism by Florida residents. This tendency may have also been influenced by fuel price increases and the recession.

Figure 10 – Florida Resident Pleasure Trips, 2001-2010

Source: VISIT FLORIDA, *Florida Visitor Study*, 2010

Visitors to Florida are staying slightly fewer days and traveling in slightly smaller groups.

Table 3 addresses the significance of tourist travel in terms of total travel demand in Florida. This table, developed based on research into Florida's total travel demand components, estimates the share of total travel demand that can be attributed to tourist travel. This estimate gives a sense of perspective regarding the overall share of demand that is tourism related and provides insight into the relative growth rates of tourism-related travel to overall vehicle miles of travel. This analysis indicated that, as of 2010, tourism comprised approximately 8 percent of all Florida vehicle miles of travel. This share is below the peak years in the past two decades.

Table 3 – Estimated Vehicle Travel by Florida's Visitors and Share of State Total

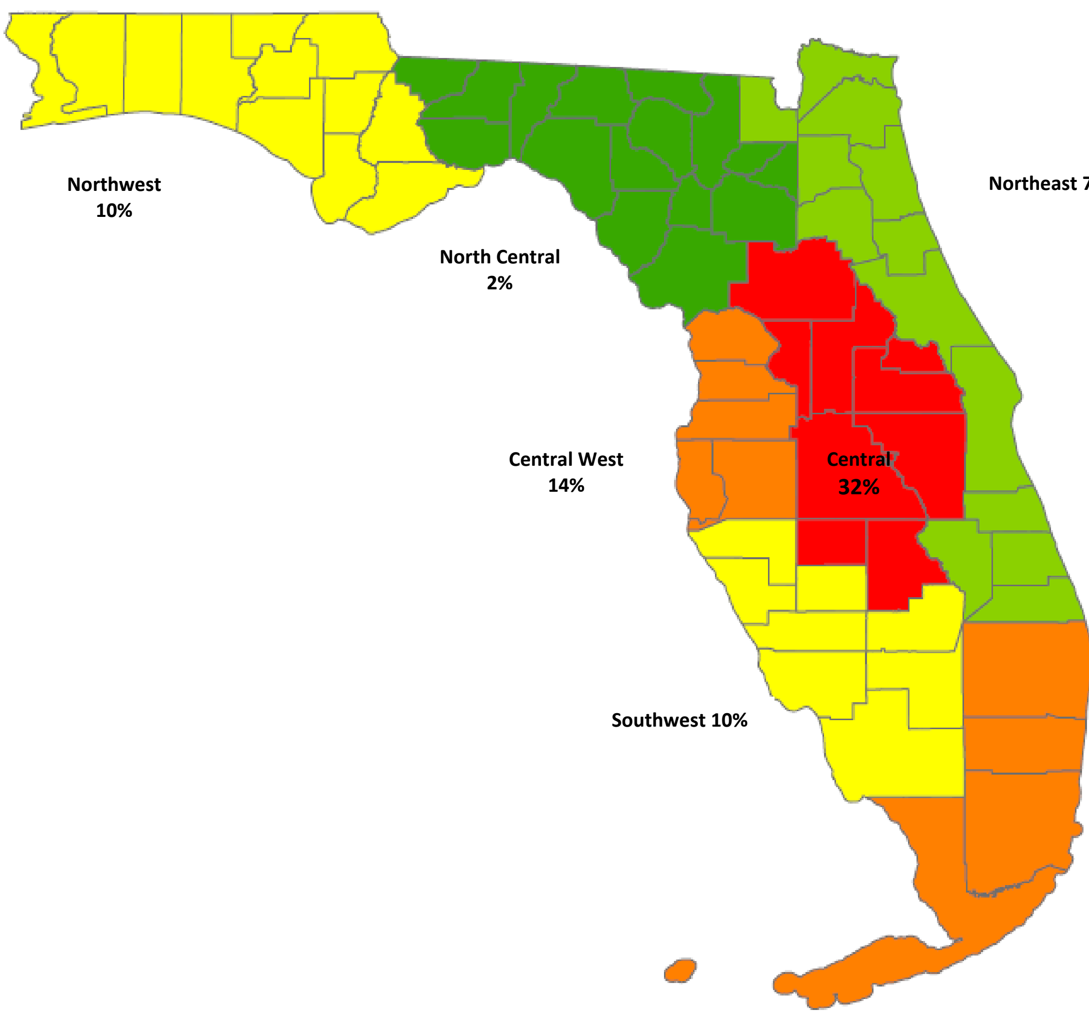
Year	Vehicle Miles Traveled (millions)				As a Percent of State Total			
	Domestic Air	*Domestic Auto*	*Foreign*	*All Visitors*	*Domestic Air*	*Domestic Auto*	*Foreign*	*All Visitors**
1984	2,699	5,192	524	8,415	3.2%	6.1%	0.6%	9.8%
1985	2,487	5,495	557	8,539	2.8%	6.2%	0.6%	9.7%
1986	2,853	5,443	675	8,970	3.3%	6.2%	0.8%	10.3%
1987	2,738	7,934	831	11,503	2.9%	8.5%	0.9%	12.3%
1988	3,514	8,721	1,084	13,319	3.3%	8.3%	1.0%	12.6%
1989	2,859	8,539	1,354	12,752	2.6%	7.8%	1.2%	11.7%
1990	2,929	8,426	1,469	12,825	2.7%	7.7%	1.3%	11.7%
1991	3,173	8,491	1,698	13,363	2.8%	7.5%	1.5%	11.8%
1992	3,370	9,407	1,968	14,744	2.9%	8.2%	1.7%	12.9%
1993	3,717	10,100	2,123	15,941	3.1%	8.4%	1.8%	13.2%
1994	3,775	9,186	1,913	14,874	3.1%	7.5%	1.6%	12.2%
1995	3,736	8,766	1,912	14,413	2.9%	6.9%	1.5%	11.3%
1996	3,820	8,178	2,087	14,085	2.9%	6.3%	1.6%	10.8%
1997	3,174	9,130	2,222	14,526	2.4%	6.8%	1.7%	10.8%
1998	3,515	9,100	2,222	14,837	2.6%	6.6%	1.6%	10.8%
2003	3,266	11,081	1,126	15,474	1.8%	6.0%	0.6%	8.3%
2004	3,336	11,164	1,551	16,051	1.7%	5.7%	0.8%	8.2%
2005	4,261	11,138	1,447	16,846	2.1%	5.5%	0.7%	8.4%
2008	3,838	9,802	1,180	14,820	1.9%	4.9%	0.6%	7.5%
2009	3,746	10,439	1,931	16,116	1.9%	5.3%	1.0%	8.2%
2010	3,201	10,226	2,187	15,614	1.6%	5.2%	1.1%	8.0%

Note: Data from 1999-2002 and 2006-2007 were not analyzed due to unavailability of related reports.
Note: *Percentages may not add up due to rounding.
Source: VISIT FLORIDA; Federal Highway Administration, *2009 National Household Travel Survey(NHTS)*

The characteristics of tourist travel affect transportation system performance and needs. Information on the geographic distribution of tourist travel around the state is presented in the figures and tables that follow. Figure 11 shows regional allocations of destinations of domestic visitor trips. It is well known that in locations such as the Keys (Southeast region) and the Orlando area (Central region), as well as smaller sections of many areas, tourist travel is a very significant share of total travel demand. While available data can give a sense of tourist travel for various urban areas, such data are generally not available on a roadway segment level.

However, more detailed data on tourism travel routes would no doubt prove useful in addressing more localized transportation needs and funding strategy issues. Local planning agencies gain knowledge of the geographic distribution of tourist travel as they carry out various survey and modeling initiatives. The daily temporal distribution of tourist travel, especially the presence of tourist travel during peak travel periods, is also of use in local planning.

Figure 11 – Allocation of Domestic Visitor Trips by Region, 2010



Source: VISIT FLORIDA, *Florida Visitor Study,* 2010

Table 4 presents the county destinations for domestic visitors. For both overseas and domestic visitor groups, Orlando, Miami, and Tampa-St. Petersburg are the choice destinations.

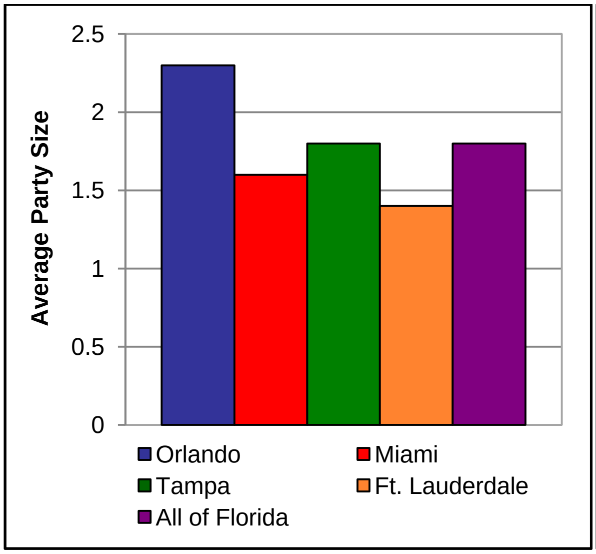
Table 4 – Top 10 County Destinations for Domestic Visitors, 2010

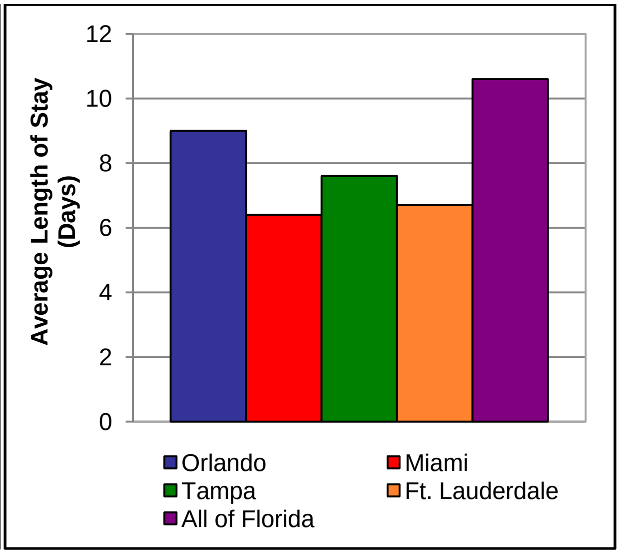
Rank	Air	Auto	Total
1	Orange (34.7%)	Orange (23.4%)	Orange (28.9%)
2	Miami-Dade (9.5%)	Bay (8.0%)	Hillsborough (8.1%)
3	Hillsborough (9.1%)	Duval (6.5%)	Broward (6.4%)
4	Broward (8.9%)	Hillsborough (6.0%)	Miami-Dade (5.9%)
5	Palm Beach (5.5%)	Okaloosa (6.0%)	Duval (4.2%)
6	Lee (5.0%)	Volusia (4.1%)	Bay (4.2%)
7	Pinellas (4.1%)	Pinellas (3.8%)	Pinellas (3.9%)
8	Collier (3.1%)	Broward (3.7%)	Lee (3.6%)
9	Duval (2.5%)	Sarasota (3.2%)	Palm Beach (3.3%)
10	Brevard (2.1%)	Escambia (3.0%)	Volusia (3.3%)

Source: VISIT FLORIDA, *Florida Visitor Study*, 2010

Figure 12 provides the average party size and the average length of stay of overseas visitors to popular cities in Florida in comparison with all of Florida.

Figure 12 – Average Party Size and Average Length of Stay of Overseas Visitors





Source: VISIT FLORIDA, *Florida Visitor Study*, 2010

Florida Resident Vacation Travel

This section presents travel undertaken by Floridians. Floridian vacation travel is often dramatically different than that of out-of-state or international visitors.

All analyses conducted in this section used the 2009 National Household Travel Survey (NHTS), a dataset that collects travel behavior of individuals residing in the United States. For this analysis, only vacation trips by Floridians were analyzed. There are several caveats to the dataset that the reader should be aware of while reading and interpreting the results.

First, the definition of a "vacation trip" is not specifically defined by the NHTS and is left up to the respondent to interpret individually. Vacation trips can include long-distance travel to/from home to another city (by driving, flying, or another mode) or travel within the destination city (on all possible modes). Complicating the issue is that the NHTS has a "social/recreational" trip category, which may cause some differences in interpretation. These similar categories might mean that some travel at the destination city (perhaps going from the hotel to a restaurant) might be classified by one respondent as vacation travel and another as social recreation travel.

Second, the NHTS does not provide specific definitions for the different public transit modes. This means that respondents could have different interpretations on the difference between a "shuttle bus" and a "local public bus" or between a "commuter bus" and a "charter/tour bus."

Third, due to privacy issues, it is not possible to ascertain where Floridians travel to/from. As such, Floridian vacation travel is not necessarily limited solely to within Florida. However, an analysis of Floridian vacation trips reveals that only a very small percentage of the sample is likely to be inter-state travel. The number of trips (unweighted) by airplane (presumably a long-distance travel mode) is less than 1 percent of the total vacation trips. In addition, only about 4 percent of all trips reported as vacations are greater than 100 miles, suggesting that respondents attribute all travel as part of a vacation event or period as vacation trips - thus, the relatively low vacation trip length.

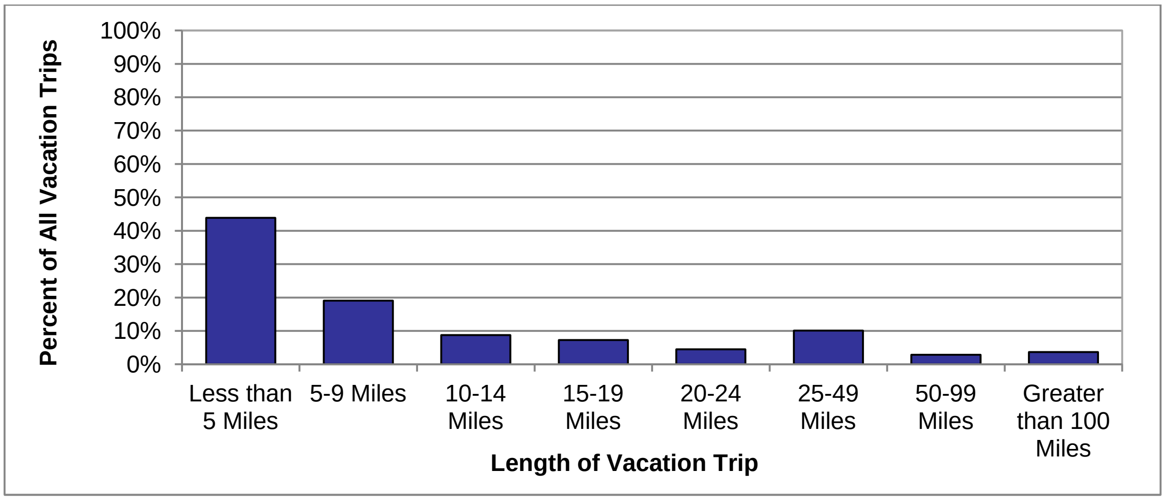
More information on the NHTS can be found in the 2009 NHTS User's Guide (http://nhts.ornl.gov/2009/pub/UsersGuideV2.pdf).

Vacation Trip Characteristics

Vacation trips account for only about 1.3 percent of all trips made by Floridians. However, they can have different characteristics and impact the transportation network differently than normal daily trips.

An analysis of trip length for vacation trips (Figure 13) reveals that a vast majority of vacation trips are less than 10 miles. Part of this can be explained by the fact that households will often choose accommodations that are within a short distance of planned activities.

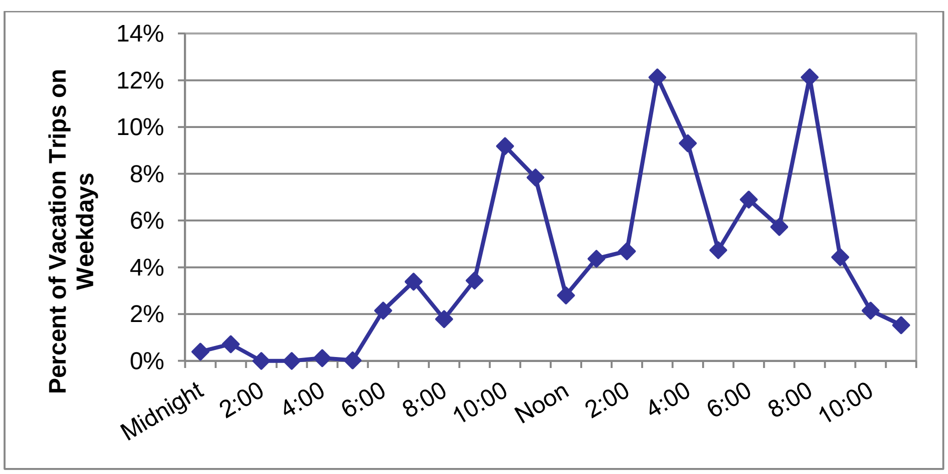
Figure 13 – Vacation Travel Trip Length



Source: Federal Highway Administration, *2009 NHTS*

An analysis of the temporal distribution of trips by day of the week reveals just how different vacation travel is. As seen in Figure 14, weekday vacation travel generally has three peaks. Interestingly, the morning and afternoon peaks do not coincide with normal commuting peak travel times, suggesting that vacationers generally try to plan their schedule to avoid rush hour. The evening peak can partially be attributed to attending nighttime activities, such as evening firework shows or dining out.

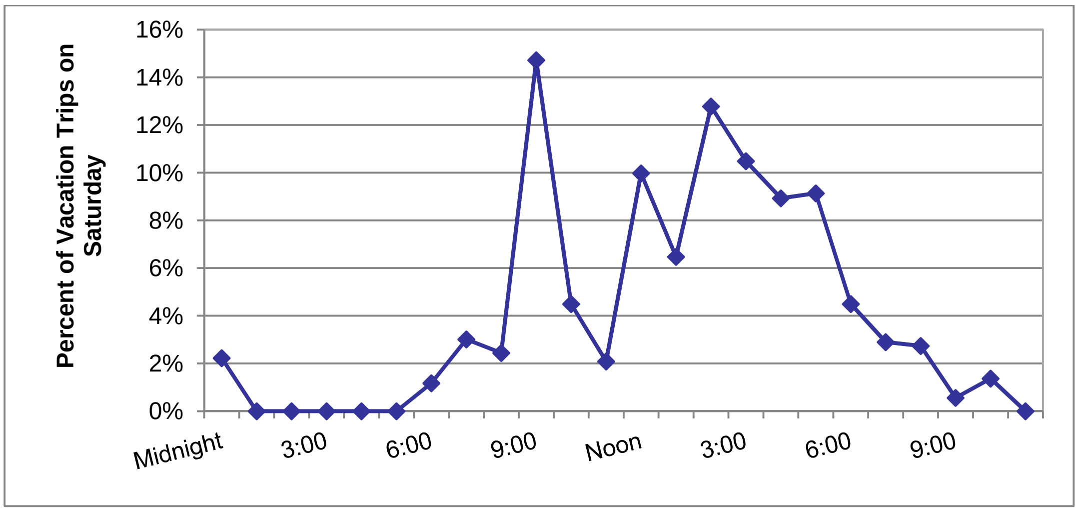
Figure 14 – Temporal Distribution of Vacation Trips on Weekdays



Note: Interpret with caution due to small sample size (335 records).
Source: Federal Highway Administration, *2009 NHTS*

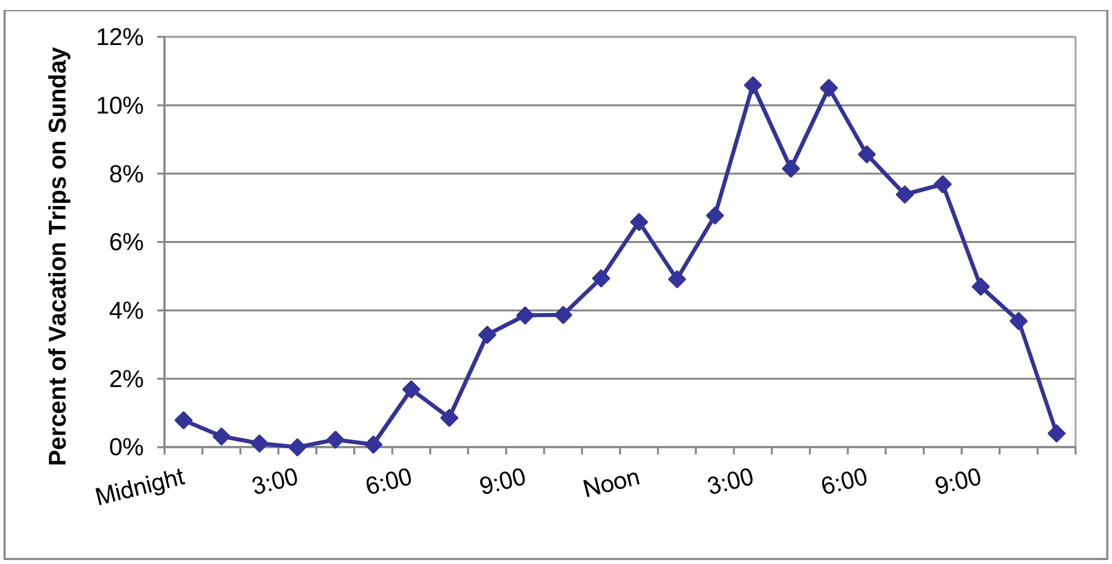
The temporal distribution of vacation trips on weekends is slightly different from those on weekdays. In Figure 15, vacation trips on Saturday generally start a little earlier in the morning, suggesting that some families taking weekend vacations are making long-distance travel. In addition, there is no evening peak observed on weekdays. On Sundays (Figure 16), most trips tend to be starting in the afternoon. This phenomenon could partially be explained by weekend vacationers traveling back home.

Figure 15 – Temporal Distribution of Vacation Trips on Saturday



Note: Interpret with caution due to small sample size (226 records).
Source: Federal Highway Administration, 2009 *NHTS*

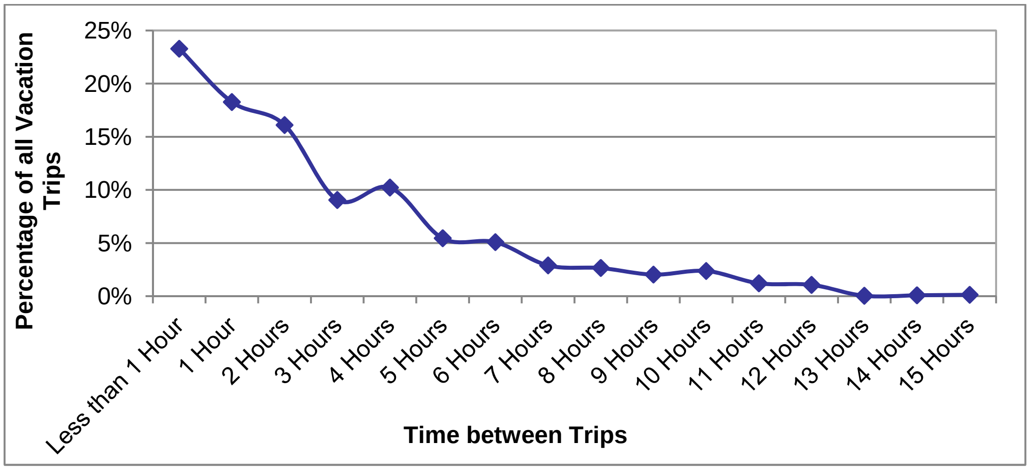
Figure 16 – Temporal Distribution of Vacation Trips on Sunday



Source: Federal Highway Administration, *2009 NHTS*

Analyzing the time duration between trips can provide a sense for how long vacationers stay at a given location. Figure 17 shows that while most vacation trips are very short in duration; there are a small number of trips that extend well past the 8-hour mark. Short trips here can include vacationers dining out, stopping at a visitor center, or visiting a grocery store to buy some provisions.

Figure 17 – Time between Vacation Trips

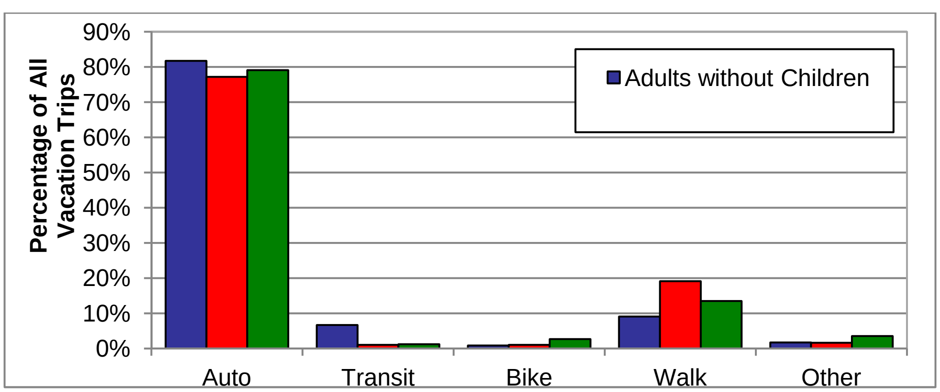


Source: Federal Highway Administration, *2009 NHTS*

Vacation trip characteristics are often dependent upon household characteristics. The presence of children and whether or not adults work in the household can often influence vacation travel.

An analysis of mode share by life cycle classification (Figure 18) shows that both working status and the presence of children do have some impact on selection of travel modes. The “other” mode category encompasses modes such as airplane, taxi, and ferry. Transit modes are defined as local public bus, commuter bus, subway/elevated rail, commuter train, and streetcar/trolley. Hotel shuttles, charter buses, and other tourist-oriented shuttles are not considered forms of public transportation in this analysis.

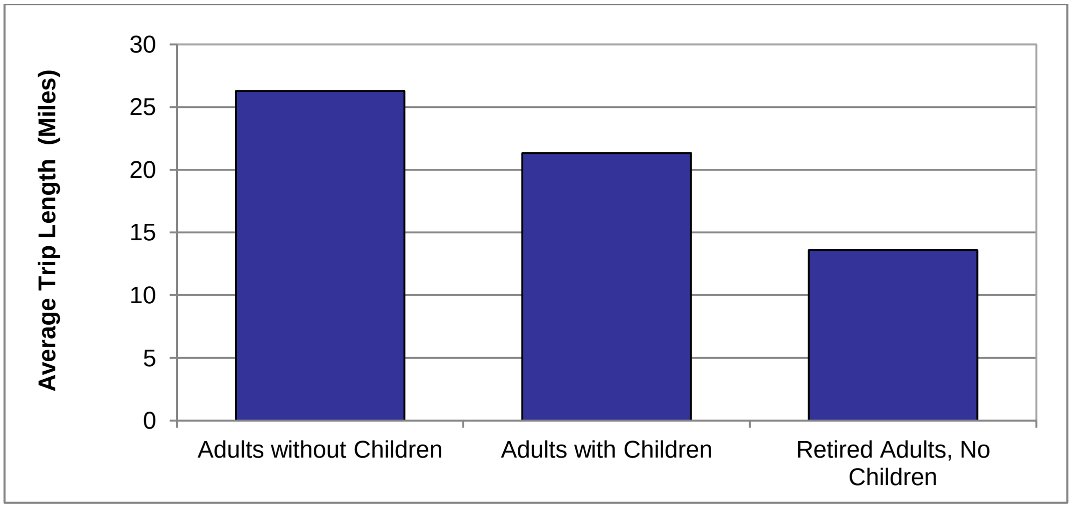
Figure 18 – Vacation Trip Mode Share by Household Life Cycle



Source: Federal Highway Administration, *2009 NHTS*

Similarly, an analysis of trip length by life cycle in Figure 19 shows dramatic differences in household trip length. The shorter trip lengths by families with children as well as with retired adults could be tied to the increased difficulty of travel.

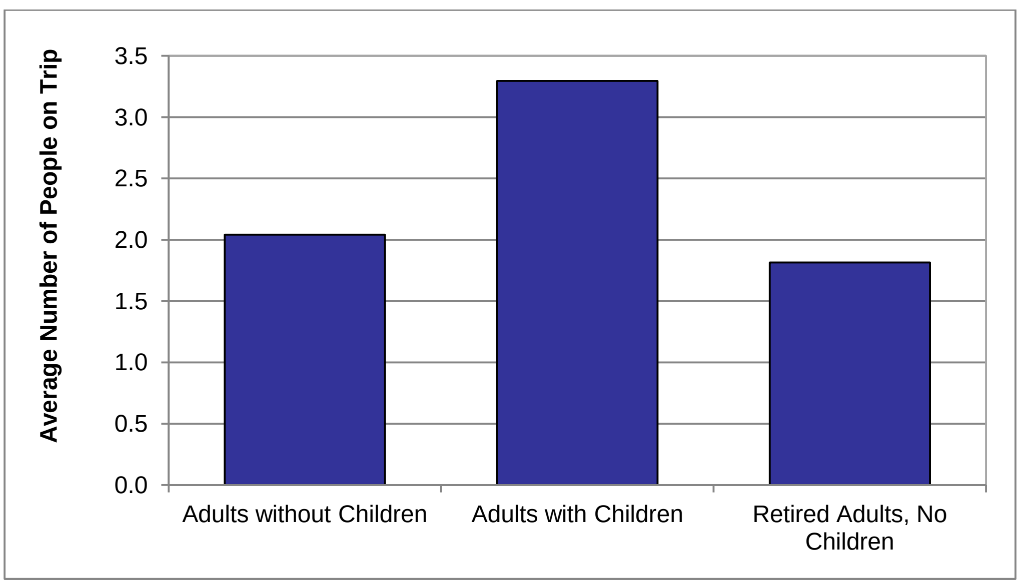
Figure 19 – Vacation Trip Length by Household Life Cycle



Source: Federal Highway Administration, *2009 NHTS*

The number of people on vacation trips also varies by household life cycle. As Figure 20 shows; the average number of people is highest for families with children and lowest for retired adults.

Figure 20 – Number of People on Trip by Household Life Cycle



Source: Federal Highway Administration, *2009 NHTS*

Analyzing the number of people in a party by mode provides more insight into vacation travel. As Table 5 shows, trips by auto are generally taken by larger groups. Vacation travel by transit is also shown to have somewhat large group sizes.

Table 5 – Number of People on Trip by Mode

Mode of Travel	Average Party Size	Standard Deviation
Auto	3.0	1.7
Transit	2.8	1.7
Bike	1.0	0.0
Walk	1.3	0.8
Other	1.3	1.2

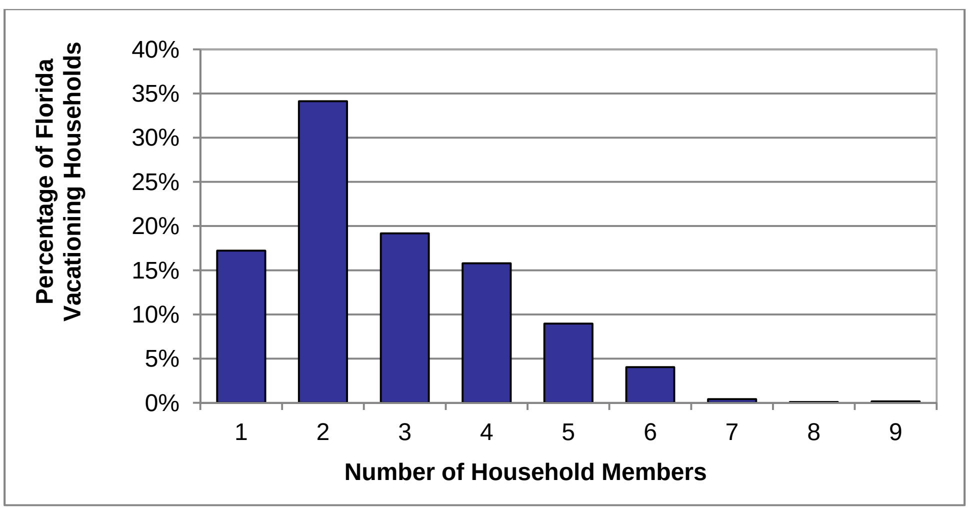
Source: Federal Highway Administration, *2009 NHTS*

Household and Person Characteristics

This section presents some basic descriptive information on households and individuals participating in vacation travel. These characteristics are useful in understanding vacation travel taken by Floridians.

Figure 21 shows the household size distribution for all vacationing households. It can be seen that a little over half of all vacationing Floridian households are two persons or less.

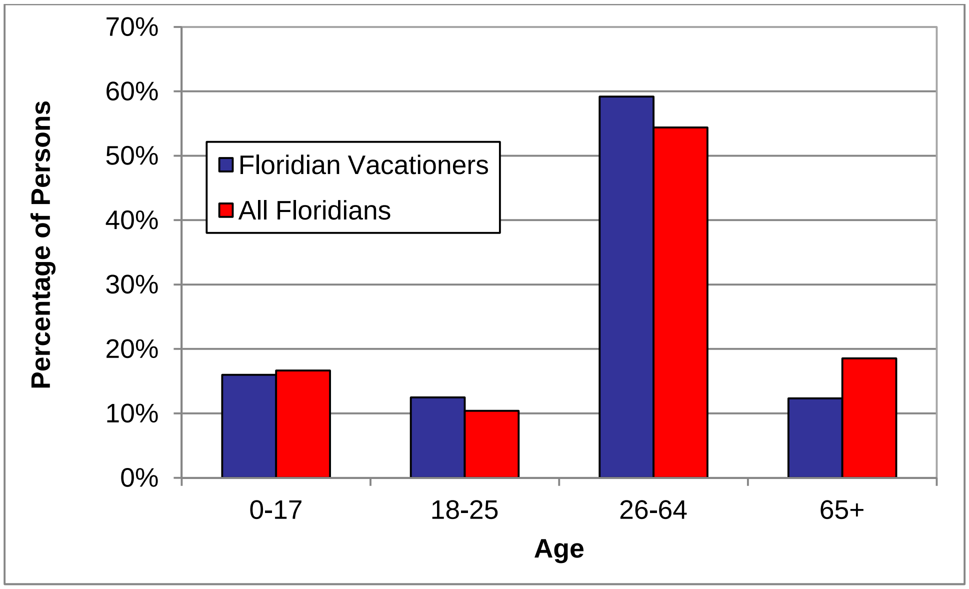
Figure 21 – Size of Florida Vacationing Households



Source: Federal Highway Administration, *2009 NHTS*

An analysis of the age of Floridians and Floridian vacationers shows that most vacationers are in their working years and that working age groups vacation somewhat more than their proportion of the population (Figure 22).

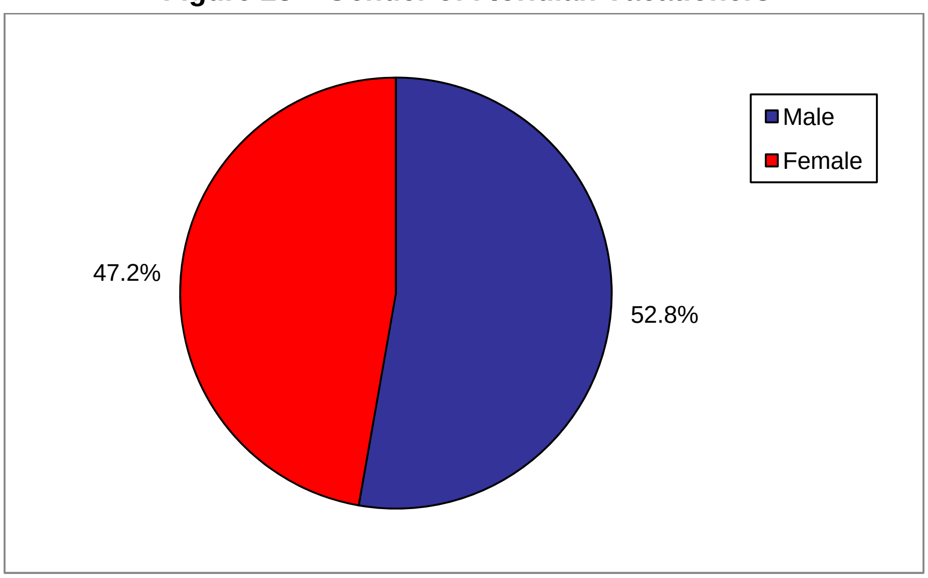
Figure 22 – Age breakdown of Floridians and Floridian Vacationers



Source: Federal Highway Administration, *2009 NHTS*

An analysis of gender (Figure 23) shows a nearly equal distribution of males and females participating in vacation travel.

Figure 23 – Gender of Floridian Vacationers



Source: Federal Highway Administration, *2009 NHTS*

Conclusion

Interest in tourism derives from the nature of the travel demands it places on the transportation systems. In addition to the discussion of the impact of tourism and visitors on the transportation system in this report, modes that are strongly influenced by tourist travel demands are discussed in the Trends and Conditions Reports on seaports, airport facilities, and rail facilities.

While the data in this report suggest reasonable seasonal uniformity of visitor travel, the hourly distribution of travel during the day (for Floridians) indicates different travel behaviors from normal daily travel. Other research conducted for FDOT has suggested that the impacts of tourist travel may be disproportionate to its share of the traffic volume. Specifically, tourists as non-regular users are more likely to be novice users on a given facility and may not operate their vehicles as would a regular traveler. This might include observing sites, looking for directions, driving rental vehicles with which they may be less familiar, being tired after busy event schedules, driving campers, or pulling trailers. Thus, accommodating tourist needs for capacity and design features that ameliorate these conditions is among the challenges of transportation planners.

The available data suggest that the impact of visitors in terms of their share of all roadway travel has fallen from its peak levels over the past decade. Nonetheless, this level of demand remains significant in terms of its impacts on transportation needs in Florida.

Looking ahead, one can only speculate on the share of travel on Florida roads that will comprise tourists and visitors. However, the mobility of the dominant baby-boom generation and the fundamental appeal of Florida's climate, as well as the significant tourist infrastructure base, suggest that tourism will continue to be a significant factor in Florida's travel demand for the foreseeable future.

Tourism will remain an important driver of travel demand in Florida's future.

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