



Economic Assessment of the *Scenic Sumter Heritage Byway* in Sumter County, Florida

Final Report

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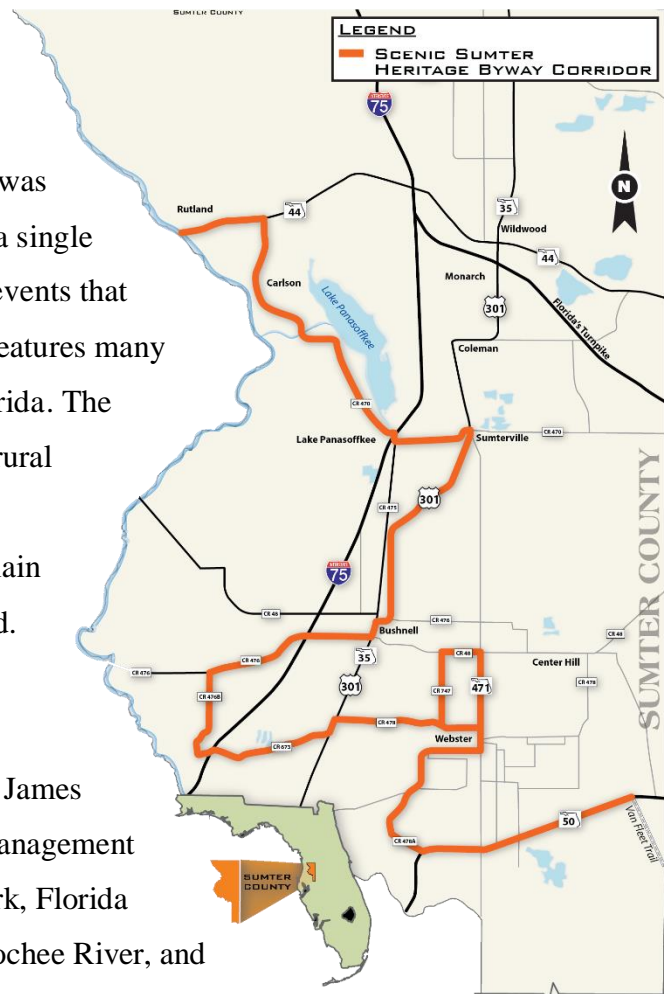
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Executive Summary

Numerous scenic highways have been established in the United States since the creation of the National Scenic Byways Program (NSBP) in 1991, initiated under the Intermodal Surface Transportation Efficiency Act (ISTEA). In 1993, State legislation was passed to enable the State, through the Florida Department of Transportation (FDOT), to establish an official program for scenic highways. In 1994, the Department applied for and received a Scenic Byways Grant from the Federal Highway Administration (FHWA) to develop a Florida Scenic Highways Program (FSHP) that was officially rolled out in 1996. The State of Florida has since designated 26 scenic highways, including six that are nationally recognized. Economic assessments conducted for scenic highways in other states have demonstrated their significant economic contributions, however, no definitive economic assessments have been performed for scenic highways in the State of Florida.

This study was commissioned by the FDOT District Five to assess the economic impacts of the Scenic Sumter Heritage Byway (SSHB) in Sumter County, designated in 2013. This byway was chosen for this investigation because it is within a single county, has strong local support, attractions and events that are suitable venues for conducting surveys, and features many resources common to other scenic byways in Florida. The roads that comprise the 62-mile Byway traverse rural communities, pastoral farmlands, cattle ranches, parklands lush hardwood hammocks, and floodplain forests within the Withlacoochee River watershed. The corridor highlights the scenic views and rich heritage of Sumter County through byway travel. Attractions along the Byway include the General James Van Fleet Trail State Park, Richloam Wildlife Management Area (WMA), Dade Battlefield Historic State Park, Florida National Cemetery, Lake Panasoffkee, Withlacoochee River, and the Half Moon Wildlife Management Area.



Scenic Sumter Heritage Byway Map

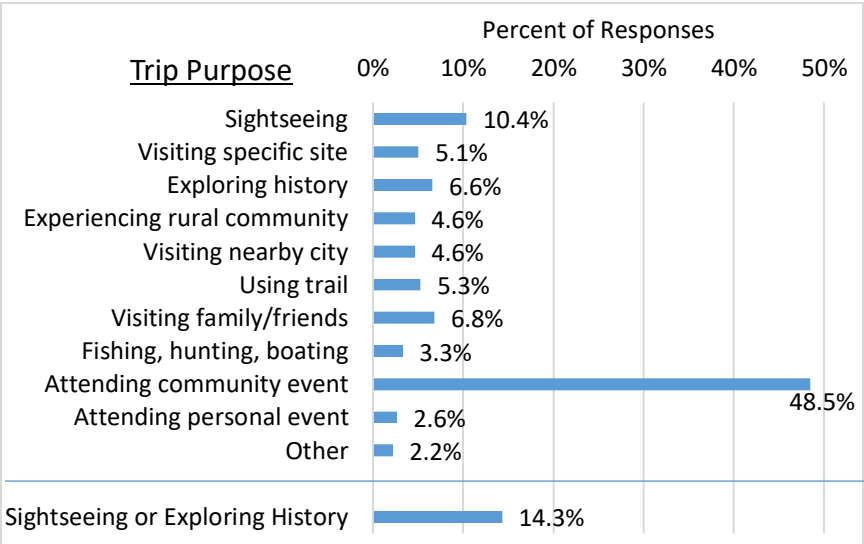
As a “grass-roots” based program, the FDOT requires the establishment of a byway organization composed of community stakeholders and partners committed to implementing the approved byway management plan (BMP) associated with their scenic byway designation. This BMP identifies the

mission, vision, goals and objectives of the organization. The Scenic Sumter Heritage Byway Organization is a grass-roots organization committed to attaining their vision for the byway based on a multi-year work plan. The Scenic Sumter Heritage Byway Organization consists of volunteers who are passionate about the heritage, traditions, recreational and scenic resources of their community. They work with their partners to showcase these resources, educate the community and advocate for community-based decision making that protects and enhances these resources.

Currently, there are no dedicated funding sources available through the federal government to support scenic highway programs. The FDOT has identified funding to maintain a basic program; however, additional funding is needed. Thus, volunteer-based non-profit byway organizations such as SSHB have attempted to seek out alternative funding sources to accomplish their mission. Assessment of the economic benefits of a FSHP designation is needed to help garner continued private and public support in the face of competing interests for limited funding.

To help assess the current economic impacts of the Scenic Byway designation in Sumter County, a combination of methods involving public surveys, traffic count analysis and regional economic modeling were utilized by the University of Florida research team. Between November 2017 and March 2018, a community focus group, an online survey, personal interviews, and field surveys were conducted at eight byway locations, with 495 respondents.

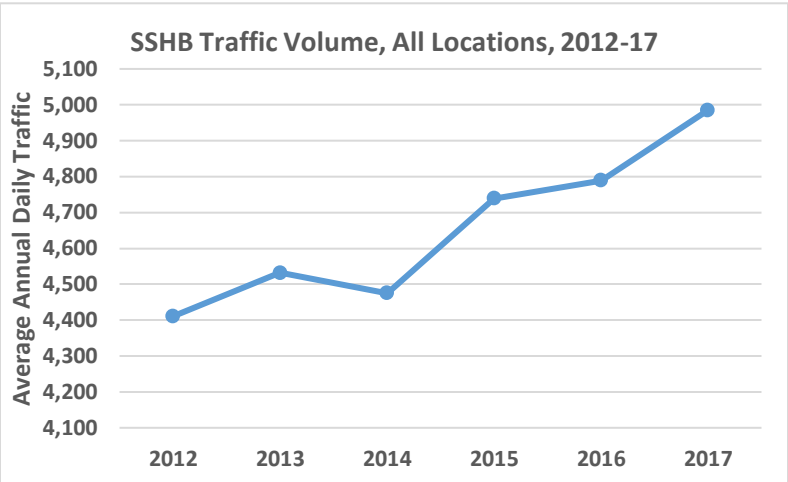
Results of the survey indicate that 23.8% of respondents were aware of the Scenic Byway and 44.5% learned about the Byway from social media or maps. Respondents reported engagement in a variety of activities, including motorcycle and bicycle riding, antique and sport car driving, and hiking and horseback riding along adjacent trails. About 14.3% of respondents said they



considered traveling on the byway for sightseeing or exploring historic sites (could choose more than one purpose). Respondents spent an average of \$135 to \$170 per day visiting sites along the byway. About 76% of respondents were very or moderately satisfied with the attractiveness of the area, and nearly 80% of respondents indicated that they would be very likely to visit the area again.

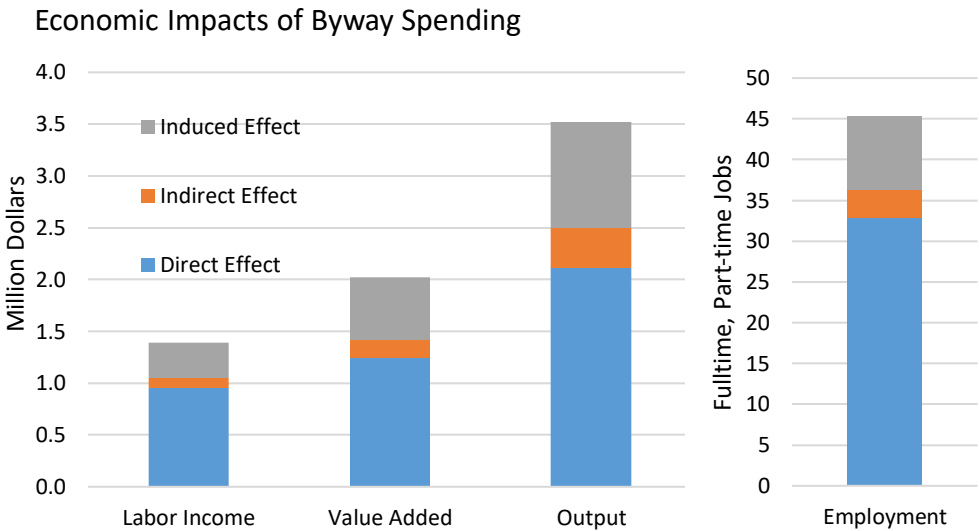
Comments made by respondents confirmed a preference for the rural, wholesome and historic character of the area, scenic beauty, warm winter weather, lack of traffic congestion, and the opportunity to experience authentic “Old Florida.”

A traffic count analysis evaluated traffic volumes on highway segments on the Scenic Byway. The analysis indicated an increase of 13.0% in average traffic volumes across 20 locations since 2012. While much of this increase can be attributed to the County’s overall growth rate it can be assumed that a portion is attributable to byway designation. The



2017 average daily traffic volume (4,985) was multiplied against the average spending per day by nonresident parties (\$134.62), the share of survey respondents who were nonlocal resident visitors from outside Sumter County (59.0%), the share who reported sightseeing or exploring history as their primary trip purpose (14.3%), and the share of nonresidents who were aware of the byway (17.2%) to calculate total annual spending of \$3.55 million as an estimate of final demand attributable to the byway.

A regional economic model was created for Sumter County for economic impact analysis with the IMPLAN economic impact and social accounting software, and associated county dataset for 2016, to analyze



applicable visitor spending across all industry sectors. The total annual economic impacts attributed to the Scenic Byway were estimated at 45 full-time and part-time jobs, \$1.39 million in labor income, \$2.02 million in value added or Gross Regional Product of the county, and \$3.52 million in industry output or business revenues, including direct, indirect, and induced regional multiplier effects. The largest impacts were in the accommodation and food services, and retail trade sectors. Tax revenue

impacts to state and local governments, including sales tax, property tax were \$243,000, and federal government tax revenues were \$349,000, including payroll and personal income taxes.

Social Return on Investment (SROI) is a concept applied to the passion of volunteers who proudly represent their communities. Volunteer organizations like the Scenic Sumter Heritage Byway organization are primarily focused on education and protection. While SROI does not fit directly into the economic model used for this study, it is a key component of the economic impacts of a byway designation to a community. The SROI to Sumter County for the Scenic Byway was calculated using the value-added impact of visitor spending as the benefit, and the cumulative expenses to maintain the designation as well as the imputed value of byway volunteer time as the investment. The ratio of net annual benefit to investment (3.5:1) indicates a very attractive return when compared to many other public projects, and clearly justifies continued investments by state and local stakeholders.

Safe and reliable roads and other transport investments such as trails help reduce barriers to growth and create opportunities for people and communities. Although this report does not specifically measure the ROI of transportation projects and their impacts to the community, it's important to note that FDOT and Sumter County have numerous transportation projects under development in the general vicinity of the Byway. These investments are testaments that the area is growing, and is attractive to visitors to Sumter County.

In conclusion, the Scenic Sumter Heritage Byway organization has been successful in its mission to promote tourism, showcase the outstanding natural beauty, recreational and historical resources of the area, and create a unique sense of place. The study results indicate that there is substantial awareness of the Byway, that it attracts many visitors to the area who are satisfied with their experience and likely to visit again, and whose spending contributes significantly to the local economy. This success is attributable, in great part, to the dedicated efforts of community-minded volunteers.

1. Introduction

The National Scenic Byways Program was established by Congress in 1991 to preserve and protect the nation's scenic roads and promote tourism and economic development. Designated byways are recognized for scenic, natural, cultural, recreational, historic, or archeological qualities. For example, scenic quality is defined as the heightened, strikingly distinct and memorable visual experience derived from viewing the landscape environment of the byway corridor. Byways having at least two of these qualities and having features that are unique in the U.S. may be designated All-American Roads. National Scenic Byways are established through a rigorous process involving local stakeholder input and are required to have a corridor management plan to identify the geographic extent of the corridor, the qualities and resources provided, and a strategy for maintaining the corridor to accommodate economic development. The program is administered by the Federal Highway Administration.

Presently, there are 150 National Scenic Byways, including 39 All-American Roads, located in 48 states that have scenic byway programs (U.S. Federal Highway Administration, 2018). In Florida, the Florida Keys Scenic Highway is designated an All-American Road. In addition, there are five National Scenic Byways in the State of Florida: A1A Scenic and Historic Coastal Byway, Big Bend Scenic Byway, Indian River Lagoon National Scenic Byway, Ormond Scenic Loop and Trail and the Florida Black Bear Scenic Highway.

While most scenic highways are designations of existing highways that happen to be in areas with notable scenic beauty or other natural or cultural resources, there are a few purpose-built scenic byways in the United States. For example, the Blue Ridge Parkway is arguably the most well-known such byway, stretching over 469 miles in the Appalachian Mountains, connecting Shenandoah National Park in Virginia to the Great Smokies National Park in Tennessee and North Carolina. Construction of the parkway started during the Great Depression and took over 50 years to complete. The Natchez Trace Parkway is another purpose-built scenic byway following the historic Native American trail 440 miles from Natchez, Mississippi to Nashville, Tennessee.

1.1. The Florida Scenic Highway Program

The Florida Scenic Highway Program was established by the Florida Department of Transportation (FDOT) in 1996 to showcase the cultural, historic, archaeological, recreation, natural, and scenic resources along Florida's highways, qualities that are valued by Florida residents and millions of tourists who visit the State each year. The primary intent of the Florida Scenic Highways Program is to designate roadway corridors to preserve, maintain, protect, and enhance intrinsic resources for the

traveling public's enjoyment. Currently, there are 26 designated scenic highways with over 1,500 miles in the state (Figure 1.1). FDOT District Five has eight of these byways encompassing over half of the scenic highway mileage in the state (Figure 1.2).

Figure 1.1. Map of scenic highways in Florida



Source: Florida Department of Transportation

Figure 1.2. Map of scenic highways in central Florida, FDOT District Five



Source: Florida Department of Transportation

As a “grass-roots” based program, the FDOT requires the establishment of a byway organization composed of community stakeholders and partners committed to implementing a scenic byway designation. To complete the designation process, these community representatives must prepare a byway management plan that identifies the organization’s mission, goals, and objectives. Upon designation, these local advocates work to accomplish their mission through implementation of a work plan based on their established goals.



Scenic Sumter Heritage Byway committee meeting at The Villages

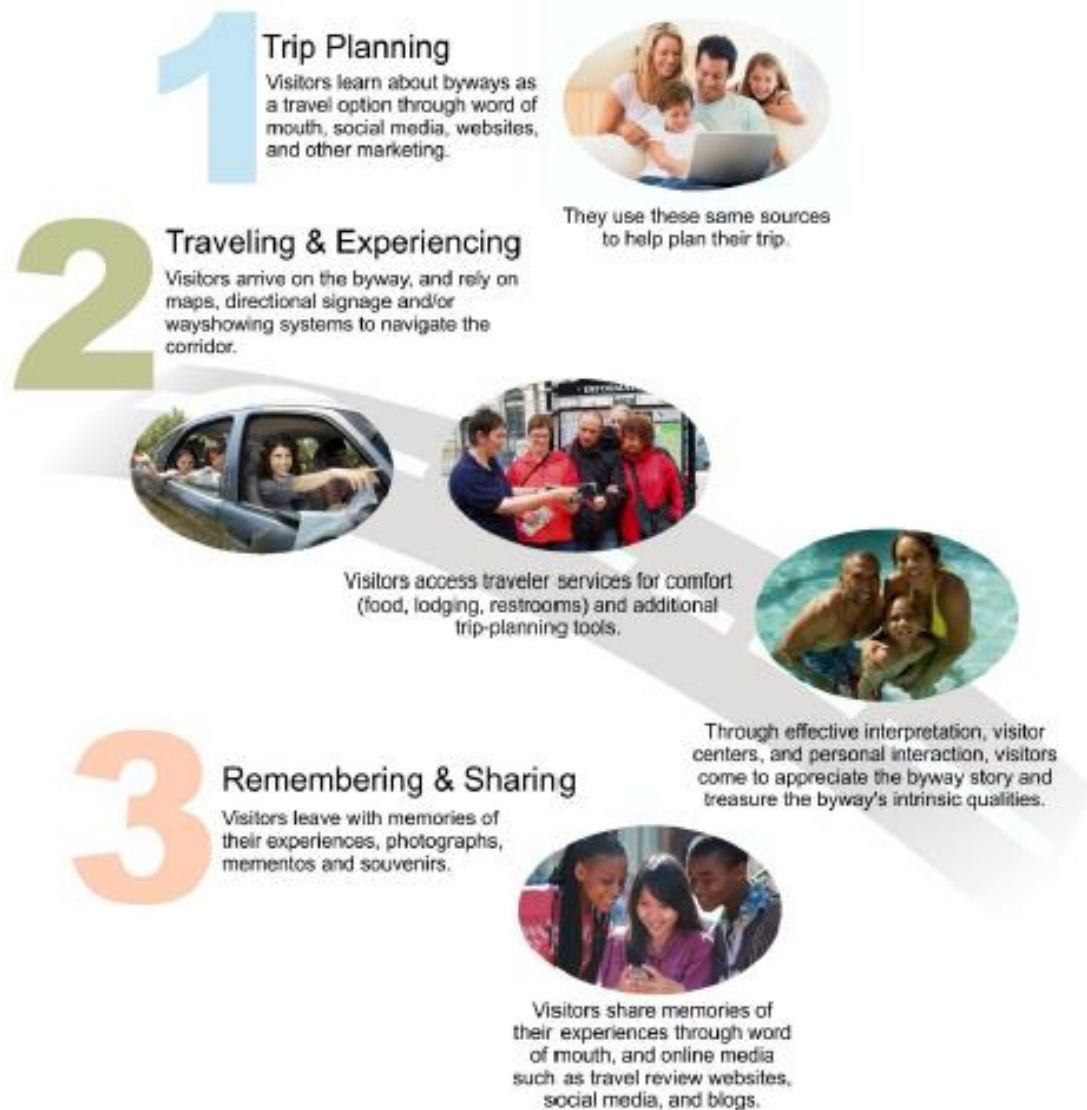
The Florida Scenic Highway Program Guidance Document suggests that the user experiences of scenic highways can be understood in terms of three stages: before, during, and after the visit, also known as trip planning, traveling/experiencing, and remembering/sharing, as depicted in Figure 1.3 (FDOT, 2016, chapter 5). The idea that a byway visit occurs in three stages was first introduced in the *Wayshowing for Byways* reference manual produced by the America’s Byways Resource Center in 2011. The visitor experience of a place involves both tangible elements like scenic views and historic buildings, and intangible elements like authenticity and hospitality all working together to meet travelers’ needs and expectations. Understanding the visitor experience can offer a safe, rewarding and authentic experience that travelers will want to repeat and share, resulting in economic impact for byway communities. A successful byway attempts to accommodate these needs and



Ribbon cutting ceremony for Rutland kiosk with byway chair and Sumter County Commissioners (Scenic Sumter Heritage Byway organization)

interests to create a rewarding experience, and generates increased tourism that provides a direct economic benefit to byway communities. In this study, the visitor experience was addressed by defining visitor patterns, usage of resources, and comments received during the survey period.

Figure 1.3. Scenic highway visitor experience model



Source: FDOT, Florida Scenic Highways Program Guidance, 2016.

Currently, there is no dedicated funding from the federal government to support scenic highway programs. The FDOT has identified funding to maintain a basic program organization but agency priorities and funding levels are typically in flux. Thus, byway organizations have attempted to seek out alternative funding sources. In many cases byway organizations are pressed to document the return on

investment that their organization provides to the community as part of their request for funding. Because of the types of activities performed by byway organizations, most are incapable of providing information to address this requirement. Assessment of the economic benefits of the Florida Scenic Highway Program and its designated byways is needed to garner continued private and public support in the face of many competing interests.

This study of a selected scenic highway in Central Florida was commissioned as a preliminary step to assess the return on investment of a designated scenic byway, to help document the visitor experience, and serve as a starting point for the assessment of additional byways. The byway selected for this study is the *Scenic Sumter Heritage Byway* in Sumter County, established in 2013, including 62 miles of

highways (Figure 1.4). The byway ties together the communities of Webster, Bushnell, Sumterville, Lake Panasoffkee, Carlson, and Rutland, and includes major cultural attractions or natural points of interest such as Sumter County (Webster) Farmers and Flea Market, Florida National Cemetery, Dade Battlefield Historic State Park, General James Van Fleet Trail State Park, and Richloam Wildlife



**Mud run event with byway members at a booth
(Scenic Sumter Heritage Byway organization)**



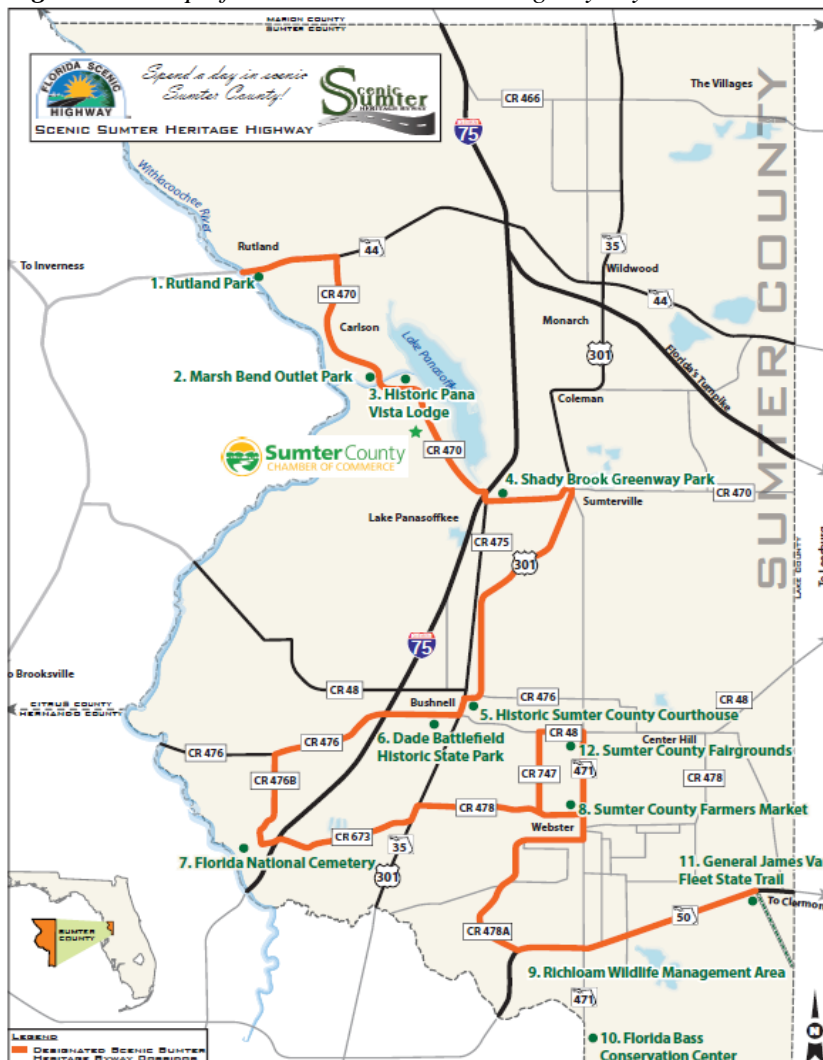
**Annual dinner meeting at Caffish Johnny's restaurant
(Scenic Sumter Heritage Byway organization)**

Management Area. This byway was chosen for this investigation because it is within a single county, has strong local support, many attractions and events that would be suitable venues for conducting surveys, and features many resources common to other scenic byways in Florida, such that the results could be generalizable to other byways in the state.



Cow chip bingo fundraising event at Bushnell Fall Festival (Scenic Sumter Heritage Byway organization)

Figure 1.4. Map of the Scenic Sumter Heritage Byway in Sumter County, Florida



Source: Florida Department of Transportation

Safe and reliable roads and other transportation investments such as trails help reduce barriers to growth and create opportunities for people and communities. Investments in transportation systems advance market-based economic and social opportunities, including employment, high-return producer goods markets, low-cost consumer goods and retail markets, and improved access to public services like healthcare and schools. Although this report does not specifically measure the ROI of transportation projects to the community, it is important to note that FDOT has 11 projects in various phases of development while Sumter County has an additional 16 transportation improvement projects underway in the county, that are summarized in Appendix G. These infrastructure investments are a testament to the area's growth and the interest of visitors to experience Sumter County.

1.2. Previous Economic Studies on Scenic Highways in the United States

A review of the literature focused on the economic impact of scenic highways in the United States found numerous examples of completed studies. In general, most studies relied on surveys of byway travelers to capture direct spending on goods and services such as lodging, food, and gas. Many studies also used regional economic models such as the Regional Input-Output Modeling System (RIMSII) by the U.S. Bureau of Economic Analysis, the Impact Analysis for Planning or IMPLAN system (Implan Group, LLC), or the U.S. Travel Association's Travel Economic Impact Model (TEIM) to estimate the indirect multiplier or "spinoff" effects of visitor spending.

Kansas State University studied models that were capable of measuring the direct economic impacts of scenic byways in Iowa, Kansas, Missouri, and Nebraska, and concluded that no consensus model was available to specifically measure the economic impacts, but that onsite personal surveys of scenic highway travelers is a preferred approach. Also, a U.S. Travel Association study pointed out that a major challenge for measuring the economic impacts of byways is the difficulty of determining the economic impact is attributable to the scenic byways versus other nearby destinations (Jensen, 2013).

A study by Bucher, Willis & Ratliff Corporation (1999) that surveyed visitors and businesses along the Flint Hills Scenic Byway in Kansas estimated that tourism provided a \$465,900 direct annual impact on local economies. CRC & Associates (2003) conducted a survey of visitors to New Mexico's byways to determine spending in each byway community using RIMS multipliers to estimate secondary impacts, and found that byways generated \$267 million in direct spending and total employment impacts of 37,000 jobs. The University of Minnesota studied the economic impacts of surveyed traveler spending and investments over a 10-year period for the Paul Bunyan Scenic Byway and Lake Country Scenic Byway. Using traffic data and an estimate of the number of

travelers who were specifically byway users, the researchers concluded that total expenditures by byway travelers were \$21.6 million. Rutgers University evaluated the economic impacts of Historic Route 66 across the country using surveys of travelers at various attractions to determine user spending and trip characteristics, and estimated the total direct economic activity related to Route 66 to be \$132 million annually (Listokin et al., 2011). The researchers also applied their input-output model, the Preservation Economic Impact Model (PEIM), to estimate \$262 million in overall economic output and \$37 million in public tax revenues.

A study by Petraglia and Weisbrod (2001) attempted to develop recommendations for best practices in conducting economic assessments of scenic byways by reviewing 21 byway economic impact studies conducted during 1990s, including some national parks and non-scenic highways. Half of the studies utilized surveys. One study found an increase in traffic of 3.4% to 20% due to byway designation. Average visitor group spending per day ranged from \$50 to \$188. Employment impacts ranged from 19 to 33 jobs per million dollars of visitor spending. Only 5 of the 21 studies attempted to differentiate between local and out-of-region visitor spending. Eight of the studies used economic multipliers to estimate secondary effects. Four of the studies addressed non-economic benefits of byway designation, including three studies that assessed willingness to pay. Eight of the studies addressed the connection between byway designation and change in traffic volume. Several attempted to determine net impacts attributable to byway designation as opposed to gross economic activity occurring along the route.

A study by Sipes et al. (1997) reviewed studies of scenic byways in 20 states regarding administration, designation criteria, and economic impacts. Fifteen of the studies reviewed addressed economic impacts. It was noted in the Sipes review that the State of Florida Scenic Byways Program requires annual reports for each byway that touch upon the economic impacts, however, no formal economic studies of scenic byways had been conducted. The paper concluded that scenic byway programs have generally been very popular, and that benefits of byway designation were commonly reported, but very few states have successfully conducted rigorous analyses to document these reported benefits. It also stated that signage, marketing, and existence of service industries to support traffic growth all are important in creating positive benefits of scenic byways, and that byways must be of high quality to provide a good user experience by travelers.

HDR Decision Economics evaluated a standardized tool, using Excel worksheets and data entry forms for estimating economic impacts of scenic highways that was commissioned by *America's Byways Resource Center* and released in 2010. A series of case studies were done for the Blue Ridge Parkway, the Woodward Avenue All-American Road, the Volcanic Legacy Scenic Byway, the

Journey through Hallowed Ground National Scenic Byway, and the Cherokee Hills National Scenic Byway (HDR Decision Economics, 2012abcde). These case studies were conducted to evaluate the effectiveness of the tool and determine the principal factors influencing results generated. Results of these case studies are summarized in Table 1.1, including direct and indirect multiplier effects.

In the case study for the Blue Ridge Parkway, some key inputs for the analysis were, 55% overnight visitors (45% day visitors), 63.7% of visitors lived outside the region, average length of stay 2.5 days, average party size of 2.5 persons, average visitor spending per trip of \$60.6, total annual visitation of 14.5 million (2010), total investment of public and private funds for byway operations and improvements were \$40.8 million (2010), and it was assumed that 25% of visitor spending in the region was attributed to the Parkway (HDR Decision Economics, 2012a). Economic multipliers for the 29-county study area were taken from the Regional Input-Output Modeling System (RIMSII) maintained by the U.S. Bureau of Economic Analysis (BEA). Economic impacts in the study region were estimated at \$880 million in annual visitor spending and \$1.454 billion in total output (business sales), employment of 9,300 jobs, employee earnings of \$252 million (Table 1.1). The largest employment impacts were reported for visitor spending (8,825 jobs), followed by investments (477 jobs) and operating expenditures (271 jobs). Impacts were also reported for local property, sales, use and lodging taxes, and state income taxes.

Table 1.1. Summary of economic impact case studies of scenic highways

	Direct Impacts	Indirect Impacts	Total Impacts
Blue Ridge Parkway (2010)			
Employment (Jobs)	6,475	2,827	9,302
Earnings (\$1000)	\$152,195	\$99,532	\$251,727
Visitor Spending (\$1000)	\$879,868	\$573,736	\$1,453,604
Annual Operating Expenses (\$1000)	\$18,018	\$13,586	\$31,604
Capital Investments to Date (\$1000)	\$22,750	\$17,154	\$39,904
Cherokee Hills Scenic Byway (2010)			
Employment (Jobs)	660	265	925
Earnings (\$1000)	\$22,037	\$8,172	\$30,209
Visitor Spending (\$1000)	\$25,870	\$9,283	\$35,153
Capital Investments to Date (\$1000)	\$35,147	\$14,973	\$50,120
Hallowed Ground National Scenic Byway (2008)			
Employment (Jobs)	4,736	1,805	6,541
Earnings (\$1000)	\$101,991	\$63,073	\$165,064
Visitor Spending (\$1000)	\$633,834	\$427,186	\$1,061,020
Capital Investments to Date (\$1000)	\$1,620	\$1,449	\$3,069
Volcanic Legacy Scenic Byway (2010)			
Employment (Jobs)	794	234	1,028
Earnings (\$1000)	\$16,898	\$7,702	\$24,600
Visitor Spending (\$1000)	\$109,070	\$53,712	\$162,782
Capital Investments to Date (\$1000)	\$528	\$297	\$825

2. Methods

This research effort was undertaken as an assessment of the economic and social impacts of the Scenic Sumter Heritage Byway using on-site and internet surveys of local residents and visitors to document user characteristics, usage patterns, and spending associated with the scenic highway. This section of the report describes the methods that were used to accomplish the assessment, including stakeholder interviews, a focus group, in-person and online surveys, traffic count analysis, regional economic impact analysis and Social Return on Investment analysis. A glossary of economic terms used in this report is provided in Appendix A.

2.1. Stakeholder and Focus Group Interviews

Due diligence for this study began with interviews of local stakeholders in Sumter County in November 2017, including elected officials and administrators, scenic byway steering committee members, and business owners. A focus group was also conducted with four local leaders at the Sumter County Extension Office in Webster in March 2018. The interviews and focus group were intended to document, current economic conditions, goals, and future projections for the scenic byway and its role in tourism promotion and economic development. In addition, questions posed in the meetings attempted to elicit comments on the scenic byway visitor experience.

Questions asked in the stakeholder interviews were as follows:

1. What is your personal role in or relationship to the Scenic Sumter Heritage Byway?
2. How does the presence of the byway affect your community or company?
3. What is the profile of typical byway visitors? (home location, age, income, education, group type, group size, interests)
4. How do visitors to the county find out about the byway? (road signs, social media, interpretive kiosks, maps, pamphlets, word of mouth)
5. How do byway visitors typically experience the byway in terms of routes followed, mode of travel, time of year, length of stay, number sites visited, events attended, spending, repeat visits, etc.?
6. What comments have you heard from visitors about the byway or byway experience?
7. What events or locations would you recommend for conducting survey interviews?
8. Are the questions on our survey reasonable to ask (show copy of survey form and indicate survey protocol)?
9. What physical improvements or promotions are needed to increase awareness, visitation, and impact of the byway?

Questions asked in the focus group were as follows:

1. What is your personal role in or relationship to the Scenic Sumter Heritage Byway?
2. What is your favorite part of the byway?
3. How does the byway affect your particular community or business?
4. What is the profile of typical byway visitors in terms of home location, age, income, education, group type, group size, interests, etc?
5. How do visitors to Sumter county find out about the byway? Ask about road signs, social media, interpretive kiosks, maps, pamphlets, word of mouth.
6. How do byway visitors typically experience the byway? Ask about routes followed, mode of travel, time of year, length of stay, number sites visited, events attended, spending, repeat visits, etc.
7. Do local county residents experience the byway differently than visitors? Has the presence of the byway shaped residents view of the county as a tourism destination?
8. What words to people use when talking about the byway experience?
9. How do byway visitors share their experience with others?
10. What physical improvements or promotions are needed to increase awareness, and use of the byway?

2.2. Survey Questionnaire Development

The survey questionnaire and interview protocol were developed based on information received from local stakeholders, FDOT District Five FSHP representatives, and the investigators' experience with travel and recreation surveys. Copies of the personal onsite interview survey and online survey questionnaires are provided in Appendices B and C, respectively. Key information gathered in the surveys included:

- Trip purpose
- Awareness of the scenic highway designation
- Means of sharing the scenic highway experience
- Satisfaction with trip(s) to the area
- Types of recreational activities participated in
- Sites visited
- Trip expenditures by category
- Group size
- Length of stay
- Number of trips in past year

- Type of accommodation
- Respondent demographics (age, gender)
- Residence location (zip code, state, county)
- General comments

The interview questionnaire was limited to one page (letter size, front and back). The online survey questionnaire was adapted from the interview questionnaire, with slight changes to accommodate the self-administered format. Every effort was made to keep the questionnaire as short as possible to enable respondents to complete the survey in 5 minutes or less and avoid respondent fatigue. The final versions of the questionnaires were approved by the FDOT Project Manager before survey implementation. The questionnaires, informed consent statement and interview protocol were approved by the University of Florida Institutional Review Board for compliance with ethical standards for human subjects research.

2.3. Survey Sampling Procedure

Events, attractions, destinations, and points of interest on the scenic byway were identified for potential survey locations that represented different types of historic, scenic, natural, recreational, and cultural resources in Sumter County. The interview survey sampling events and locations are shown in Table 2.1. Although initially targeted, surveys were not conducted at the Brownwood Strawberry Festival in The Villages, due to the community's no solicitation policy.

Table 2.1. Personal interview survey sampling events and locations

Event / Location	Event Timing	Target Audience
Sumter County (Webster) Flea Market 524 North Market Boulevard, Webster (only open Mondays)	December 4, 2017, Jan 15, 2018 (2 days, Mondays)	market shoppers, collectors
Motorcycle Veterans Wreath Laying Ceremony Florida National Cemetery, 6502 SW 102 Avenue, Bushnell	Dec. 16, 2017 (Saturday)	veterans, motorcyclists
Dade Battlefield Reenactment Dade Battlefield State Park, 7200 CR 603, Bushnell	January 6-7, 2018 (2 days, Saturday-Sunday)	history enthusiasts
Sumter Swap Meet & Antique Car Show Sumter County Fair Grounds, 7620 SR 471, Bushnell	February 9-11, 2018 (2 days, Friday- Saturday)	car enthusiasts, byway tourists
Sumter County Fair Sumter County Fairgrounds, 7620 State Rd 471, Bushnell	March 2-10, 2018 (one weekday, one weekend day)	families
4-H Horse Show Sumter County Equestrian Center	March 31, 2018 (Saturday)	horse owners, riders, and event spectators
Van Fleet Trailhead 7891 CR 772, Webster, FL	one weekday, one weekend day	bicyclists, hikers
Pana Vista Lodge 3417 County Road 421, Lake Panasoffkee	one weekend day	anglers, boaters, RV campers

A total of 350 personal interviews were completed during November-December 2017 and January-March 2018. Interviews were conducted by trained survey enumerators from the Florida Survey Research Center who read a standard script. Interviews were conducted on different days of the week and times of day, in order to capture the full range of different visitor types and experiences. Survey data were entered into electronic worksheets and checked for consistency and outlier values by Florida Survey Research Center.

For the internet (email) survey, lists of email addresses were compiled for members of organizations in Central Florida that frequently use scenic byways, such as motorcycle groups, antique car clubs, and bicyclists. A link to the survey was sent to these individuals and organizations and was also distributed to the email list of over 5,000 persons maintained by the University of Florida-IFAS Sumter County Extension Service.

2.4. Traffic Count Analysis

To evaluate motorist usage of highway segments comprising the Scenic Sumter Heritage Byway and trends in usage over time, data on traffic counts were obtained from Florida Department of Transportation. A summary of average annual daily bidirectional traffic counts at 20 permanent monitoring stations in 2017 are mapped in Figure 2.1 and data are summarized in Table 2.2. The number of vehicles counted at individual locations monitored in 2017 ranged from 300 to 12,200, and for all highway segments averaged 4,985. This number was considered as a reasonable approximation of the overall annual usage of the scenic byway for purposes of the economic analysis. Traffic volume on the byway increased by 13.0% over the period 2012-17, as shown in Figure 2.2. This increase in traffic is attributed to overall population growth and development, as well as the establishment of the byway. During the 2012-17 period, the resident population in Sumter County increased by 23.1%, from 101,698 to 125,165 persons (USDOC-BEA).

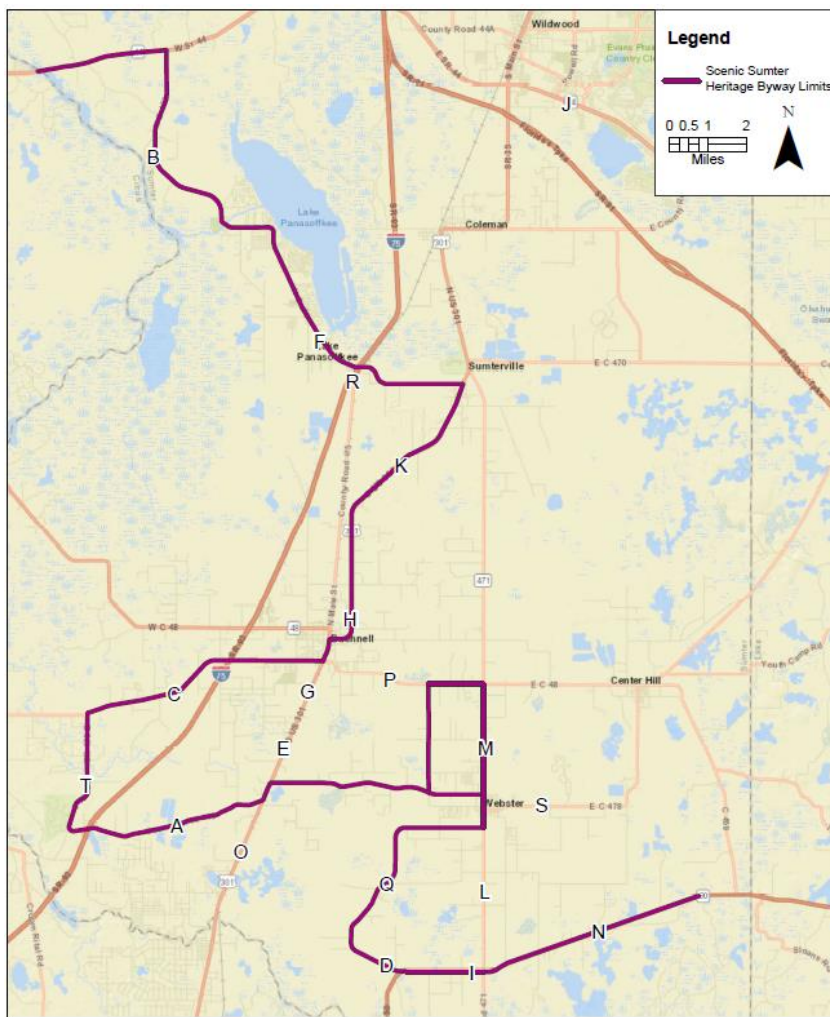
Table 2.2. Average annual daily bidirectional traffic volumes on segments of the Scenic Sumter Heritage Byway, 2017

Byway Segment (refer to Figure 2.1)	Annual Average Daily Bi- Directional Traffic	Roadway	From	To	Roadway ID
A	1,750	CR 673	West End of Br180029	Center Line of US301	18000001
B	2,200	CR 470	0.216 N of Br 184054	SR 44	18591000
C	2,600	CR 476	Hernando County Line	CR 48/S Florida St	18100000
D	6,100	SR 50	Hernando Co Line	CR-751	18030000
E	9,200	US 301	CR-48/Seminole Ave	TO CR-476	18010000
F	6,200	CR 470	0.214 S of Br 184054	US 301	18090000

G	4,800	US 301	To CR-476	CR-548/Belt Ave	18010000
H	5,700	US 301	CR-548/Belt Ave	CR-542 E	18010000
I	6,500	SR 50	CR-751	SR-471	18030000
J	12,200	SR 44	Citrus Co Line	CR-470	18070000
K	6,400	US 301	CR-542 E	West CR-470	18010000
L	6,700	SR 471	CR-478a	NE Fourth Ave	18030000
M	6,700	SR 471	NE Fourth Ave	CR-48	18030000
N	7,200	SR 50	SR-471	CR-469	18020000
O	4,800	US 301	Hernando Co Line	CR-478	18010000
P	5,000	CR 48	Florida St	SR-50	18060000
Q	300	CR 478A	SR-50	SR-471	18560000
R	2,200	CR 470	N/A	Section 18591000	18550000
S	1,500	CR 478	US 301	SR 471 / N Market Bl	18520000
T	1,650	CR 476B	W End Bridge#180029	CR-476	18508000
Average all locations		4,985			

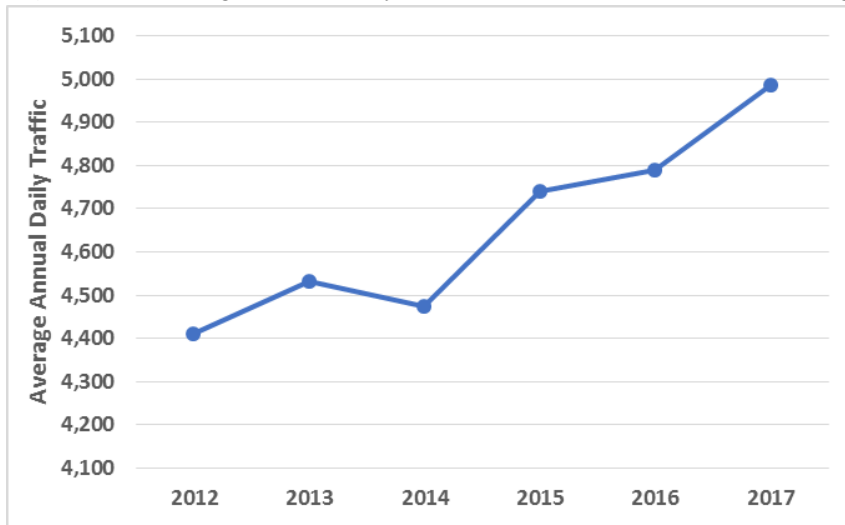
Source: FDOT, District Five, Office of Planning & Environmental Management.

Figure 2.1. Map of segments for annual daily traffic volumes on the Scenic Sumter Heritage Byway



Source: FDOT, District Five.

Figure 2.2. Average annual daily traffic volume, Scenic Sumter Heritage Byway, 2012-17



2.5. Regional Economic Analysis

To evaluate the economic impacts of byway user spending, a regional economic model was developed for Sumter County, Florida using the *Impact Analysis for Planning (IMPLAN)* input-output and social accounting software and associated state and county datasets for 2016 (Implan Group, LLC, 2016). This type of model, known as an Input-Output/Social Accounting Matrix, enables estimation of regional economic multiplier effects of industry supply chain activity (indirect effects) and household and government re-spending (induced effects) as well as direct impacts of visitor spending. The economic impacts estimated for spending by nonresident visitors to the county included employment (full-time and part-time jobs), industry output (revenue), value added, labor income (employee wages, salaries, benefits, proprietor income), property income (corporate dividends, interest, rents, royalties), and taxes paid to local, state, and federal governments. Value added is a broad measure of economic benefit that captures the total personal income and taxes generated, and is equivalent to Gross Domestic Product, or Gross Regional Product at the state or county level. The spending categories and industry sectors in the *IMPLAN* model used for analysis of visitor spending are shown in Table 2.3. Survey information on trip expenditures was used to calculate average spending per group per day by all respondents and by nonresident visitor respondents. Spending by nonresident visitors represents new final demand to the local economy, whereas spending by local residents is typically assumed to be a transfer of discretionary purchases from other activities, and as such are referred to as economic “impacts” rather than “contributions” (Watson et al., 2007). The total annual visitor spending that was considered specifically attributable to the scenic byway was determined based on the share of respondents who reported a trip purpose of “sightseeing” or “exploring history”, the share of respondents who were nonresidents (i.e. visiting

from outside the county), and were aware of the scenic byway, and the annual average vehicle counts for the byway.

Table 2.3. Spending categories and *IMPLAN* industry sectors used for analysis of visitor spending

Spending Category	<i>IMPLAN</i> Industry Sector
Restaurants/bars	501 Full-service restaurants
Food/beverage stores	400 Retail - Food and beverage stores
Lodging	499 Hotels and motels, including casino hotels
Rental vehicle	442 Automotive equipment rental and leasing
Gasoline/oil	402 Retail - Gasoline stores
Fees	512 Other personal services
Entertainment	496 Other amusement and recreation industries
Recreation gear	404 Retail - Sporting goods, hobby, musical instrument and book stores
Shopping	403 Retail - Clothing and clothing accessories stores
Other expense	405 Retail - General merchandise stores

The economic impacts of the Scenic Sumter Heritage Byway can be put in context by comparison to the overall economic activity in Sumter County, Florida. A profile of the county economy in 2016 is provided in Table 2.4. Total employment was 41,098 full-time and part-time jobs, labor income totaled \$1,516 million, Gross Regional Product was \$2,804 million and total industry output or revenues was \$5,381 million. The largest industry groups in the county in terms of employment were retail trade (5,088 jobs, 12.4%), health and social services (4,927 jobs, 12.0%), government (4,588 jobs, 11.2%), and accommodation and food services (4,310 jobs, 10.5%). The largest industries in terms of Gross Regional Product were real estate and rentals (20.8%), government (14.6%), health and social services (9.9%), utilities (9.7%) and construction (8.9%).

Table 2.4. Profile of industry economic activity in Sumter County, Florida, 2016

NAICS Industry	Employment (Full-time, Part-time Jobs)	Labor Income (M\$)	Gross Regional Product (M\$)	Industry Output (M\$)
11 Agriculture, Forestry, Fishing & Hunting	1,450	\$21.9	\$25.9	\$61.9
21 Mining	205	\$3.0	\$10.5	\$26.7
22 Utilities	399	\$47.9	\$271.1	\$597.7
23 Construction	3,288	\$152.1	\$250.2	\$493.2
31-33 Manufacturing	1,032	\$55.9	\$105.4	\$467.3
42 Wholesale Trade	750	\$26.0	\$64.2	\$124.7
44-45 Retail Trade	5,088	\$129.1	\$208.8	\$358.1
48-49 Transportation & Warehousing	794	\$41.3	\$50.7	\$115.0
51 Information	314	\$9.6	\$19.7	\$65.1
52 Finance & Insurance	2,311	\$62.0	\$85.9	\$328.6
53 Real Estate & Rental	2,173	\$38.2	\$584.6	\$953.1
54 Professional, Scientific & Tech. Services	3,899	\$100.0	\$120.1	\$306.2
55 Management of Companies	323	\$14.4	\$18.6	\$49.1

NAICS Industry	Employment (Full-time, Part-time Jobs)	Labor Income (M\$)	Gross Regional Product (M\$)	Industry Output (M\$)
56 Administrative & Waste Services	1,755	\$54.6	\$67.3	\$116.8
61 Educational Services	928	\$23.8	\$25.4	\$39.5
62 Health & Social Services	4,927	\$234.4	\$277.0	\$488.2
71 Arts, Entertainment & Recreation	1,041	\$9.3	\$17.0	\$45.9
72 Accommodation & Food Services	4,310	\$95.9	\$133.8	\$246.7
81 Other Services	1,525	\$65.9	\$59.7	\$88.8
92 Government	4,588	\$330.9	\$408.5	\$408.5
Total	<u>41,098</u>	<u>\$1,516.1</u>	<u>\$2,804.2</u>	<u>\$5,381.2</u>

Source: *IMPLAN* model for Sumter County, Florida (Implan Group, LLC).

2.6. Return on Investment Analysis

Return on investment (ROI) is a standard metric for evaluating the feasibility of alternate investments. In general, ROI is calculated as the benefit minus the investment cost, then divided by the investment or $(B-C)/C$, where B is the benefit and C is the investment. Traditionally, ROI was used to evaluate the financial returns for private business investments. Increasingly, ROI has become a preferred measure evaluating public programs and policy proposals that involve substantial investments, in which case it may be referred to as “social” ROI (SROI) since it represents net benefits to the public at large (Millar and Hall, 2012). The concept of SROI has been widely used by governments and non-profit organizations, especially in the United Kingdom and European Community, to capture nontangible economic costs or benefits such as consumer surplus or environmental externalities not normally tracked in standard accounting systems. For example, SROI has been used to evaluate public health interventions (Banke-Thomas et al., 2015) and adaptation to climate change. The translation of non-monetary values into quantitative terms may be accomplished through proxy measures agreed upon by stakeholders. When properly conducted, SROI helps align organizational performance with financial management, aids communication between internal and external stakeholders, particularly for those who prefer quantitative learning, enhances credibility and transparency, and helps identify critical sources of value.

In this study, SROI for the Scenic Sumter Heritage Byway was estimated using the value added impact of spending by nonresident visitors attributable to the byway as the benefit, while the investment cost was taken as the imputed value of local volunteer time and FDOT technical support.

3. Survey Results

3.1. Survey Responses

A total of 495 completed survey responses were received, including 350 (71%) from personal interviews and 145 (29%) from the online survey (Table 3.1). The number of completed interviews at each location is shown in Table 3.2. A high of 80 interviews were completed at the Webster Flea Market, and five locations had at least 30 interviews, while low numbers of interviews were obtained at the Pana Vista Lodge (14) and Van Fleet Trailhead (18) due to a lack of available respondents. A total of 247 persons who were approached and requested to do the survey interview declined to participate, representing an overall compliance rate of 58.6% (350 completed out of 597 attempted). Across survey sites, compliance rates ranged from 48% to 72%.

Table 3.1. Summary of survey responses

Survey mode	Number of Respondents	Percent of Responses
Interview	350	70.7%
Online	145	29.3%
Total	<u>495</u>	100%

Table 3.2. Number of survey respondents and refusals, by location, personal interviews

Interview Location or Event	Number of Respondents	Percent of Responses	Number of Refusals	Compliance Rate
Sumter County (Webster) flea market	80	22.9%	64	55.6%
Wreaths Across America event, Florida National Cemetery	30	8.6%	14	68.2%
Dade Battlefield Reenactment	56	16.0%	23	70.9%
Antique car show and car parts Swap Meet, Sumter County Fairgrounds	56	16.0%	53	51.4%
Sumter County Fair	73	20.9%	60	54.9%
4-H Horse show, Sumter County Equestrian Center	23	6.6%	11	67.6%
Pana Vista Lodge	14	4.0%	15	48.3%
Van Fleet Trailhead	18	5.1%	7	72.0%
Total	<u>350</u>	100%	<u>247</u>	58.6%

3.1. Awareness of Scenic Highways

For the combined data from interview and online surveys with 495 responses, 23.8% of respondents reported that they were aware of the Scenic Sumter Heritage Byway, 74.1% were not aware, and 2.0% did not answer this question (Table 3.3). A somewhat smaller share (17.2%) of nonlocal respondents residing outside Sumter County were aware of the scenic byway.

Table 3.3. Awareness of the Scenic Sumter Heritage Byway by survey respondents

Aware of Byway	Interview	Online	Total	Percent of All Respondents	Percent of Nonlocal Respondents
Yes	68	50	118	23.8%	17.2%
No	282	85	367	74.1%	76.2%
Don't know	0	10	10	2.0%	6.6%
Total	<u>350</u>	<u>145</u>	<u>495</u>	100.0%	100.0%

The largest number of respondents who reported the source of information for learning about the scenic byway learned through social media (27.1%), followed by byway maps (17.4%) and other sources of information (18.7%), as shown in Table 3.4. Scenic highway road signs were also an important means of learning about the scenic byway, reported by 13.8% of online respondents (this item was not asked about in the interview surveys). A number of respondents commented that they live in the area and have known about the byway or its featured sites for many years.

Table 3.4. How survey respondents learned about the Scenic Sumter Heritage Byway

Source of Information	Number	Percent of Responses to This Question	Percent of All Respondents
Map	27	17.4%	5.5%
Road sign (online only)	20	12.9%	13.8%
Media	20	12.9%	4.0%
Word of mouth	17	11.0%	3.4%
Social media	42	27.1%	8.5%
Other	29	18.7%	5.9%

3.2. Trip Purpose, Types of Activities, Places Visited

The most common purpose of trips made to Sumter County by respondents who reported their purpose was attending a community event (48.5%), followed by sightseeing (10.4%), visiting family or friends (6.8%) and exploring history (6.6%), as shown in Table 3.5. The trip purposes of “sightseeing” and “exploring history” were assumed to be specifically related to use of the scenic highway, and a total of 14.3% of respondents identified either of these purposes jointly as primary motivations (respondents were allowed to select more than one purpose). A smaller number of respondents gave their trip purpose as using a trail (5.3%), visiting a specific site (5.1%), fishing,

hunting or boating (3.3%), and attending a personal event (2.6%) or other unspecified purposes (2.2%). Some of the other purposes mentioned by respondents were “shopping at the flea market”, “vendor at the flea market”, “vacation/warm weather”, and “historical”.

Activities engaged in along the scenic byway reported by online survey respondents are summarized in Table 3.6. The most common activities reported were antique or sports car driving (14.8%) and bicycle riding (14.2%), followed by other unspecified activities (9.7%) and motorcycle riding (6.5%). Many respondents (45.8%) were not sure of a specific activity, and a substantial share (9.0%) did not answer this question. Respondents commented: “My husband and I enjoy a drive along the Scenic Sumter Historic Byway in our Jeep with the top down”, “...riding in car, stopping and taking pictures”, and “We drove many of the scenic designated roads just for fun”.

Places visited by survey respondents are summarized in Table 3.7. These places are all identified as points of interest on the scenic byway map. The most commonly visited locations were the Sumter County (Webster) Farmers and Flea Markets (13.2% of respondents), Dade Battlefield Historic State Park (11.6%), and Florida National Cemetery (8.0%). Overall, respondents visited an average of 2.0 of the noted sites on the byway, including the location at which interviews took place.

Table 3.5. Purpose of trip(s) to Sumter County reported by survey respondents

Trip purpose	Number Responses	Percent of Responses
Sightseeing	47	10.4%
Visiting specific site	23	5.1%
Exploring history	30	6.6%
Experiencing rural community	21	4.6%
Visiting nearby city	21	4.6%
Using trail	24	5.3%
Visiting family/friends	31	6.8%
Fishing, hunting, boating	15	3.3%
Attending community event	220	48.5%
Attending personal event	12	2.6%
Other	10	2.2%

Table 3.6. Activities engaged in by survey respondents

Activity	Number Responses	Percent of Responses
Motorcycle riding	10	6.5%
Bicycle riding	22	14.2%
Antique-sports car driving	23	14.8%
Other	15	9.7%
Not sure	71	45.8%
No answer	14	9.0%

Results are for the online survey only.

Table 3.7. Places visited by survey respondents on the Scenic Sumter Heritage Byway

Place	Number of Responses	Percent Of Responses
Florida National Cemetery	77	8.0%
Sumter County (Webster) farmers and flea market	127	13.2%
Dade Battlefield Historic State Park	111	11.6%
Shady Brook Greenway Park	13	1.4%
Rutland Park	11	1.1%
Historic Pana Vista Lodge	28	2.9%
Historic Sumter County Courthouse	35	3.6%
General James Van Fleet State Trail	35	3.6%
Richloam Wildlife Management Area	22	2.3%
Florida Bass Conservation Center	14	1.5%
Marsh Bend Outlet Park	21	2.2%
Sumter County Fairgrounds	173	18.0%
None	288	30.0%
Other	5	0.5%

3.3. Number of Visits, Length of Stay, and Party Size

The average number of visits to the area, length of stay and party size reported by survey respondents are shown in Table 3.8. The mean number of visits to Sumter County during the past year was 7.4, with 7.9 visits for interview respondents and 5.8 for online survey respondents. The mean number of nights stayed in the area was 26.1, but was significantly longer for online survey respondents than for interview respondents (58.2 vs 22.8). A substantial number of respondents stayed in the area for two or more months for the winter season. The mean party size was 2.7 persons.

Table 3.8. Visitation information reported by interview and online survey respondents

	Mean	Standard Error
<u>Number visits last year</u>		
Interview	7.9	1.2
Online	5.8	1.5
All	7.4	1.0
<u>Number nights stayed</u>		
Interview	22.8	4.9
Online	58.2	48.6
All	26.1	6.2
<u>Number in party</u>		
Interview	2.6	0.1
Online	3.2	0.5
All	2.7	0.1

3.4. Home Residence of Respondents

The home residence location by state and county of survey respondents was determined from zip codes reported, as shown in Table 3.9. For all respondents, 89% were Florida residents and 11% were from outside the state. Within Florida, 41% were from Sumter County, 5% to 9% from the surrounding counties of Lake, Pasco and Hernando, 2% to 5% from other counties in central Florida, and 9% from other counties in north or south Florida. Overall, 59.0% of respondents were from outside Sumter County and 43.4% were from outside the local area of Sumter, Lake, Pasco, and Hernando Counties. For personal interview respondents, 76% were from outside Sumter County and 57% from outside the local multicounty area. The percentage of all survey respondents residing outside Sumter County was used to calculate the share of new visitor spending in the county for the purpose of economic impact analysis.

Table 3.9. Home residence state and county of survey respondents

Residence State / County	All Respondents		Interview Respondents	
	Number	Percent of total	Number	Percent of total
Florida	415	88.7%	284	85.0%
Sumter	192	41.0%	78	23.4%
Lake	43	9.2%	35	10.5%
Pasco	30	6.4%	30	9.0%
Hernando	24	5.1%	24	7.2%
Polk	23	4.9%	23	6.9%
Marion	17	3.6%	15	4.5%
Hillsborough	14	3.0%	13	3.9%
Citrus	11	2.4%	11	3.3%
Orange	10	2.1%	9	2.7%
Pinellas	10	2.1%	9	2.7%
Other Florida counties	41	8.8%	37	11.1%
Michigan	8	1.7%	7	2.1%
New York	6	1.3%	6	1.8%
Ohio	5	1.1%	5	1.5%
Indiana	5	1.1%	5	1.5%
Pennsylvania	4	0.9%	3	0.9%
Alabama	3	0.6%	3	0.9%
Tennessee	3	0.6%	3	0.9%
North Carolina	2	0.4%	2	0.6%
Arkansas	2	0.4%	2	0.6%
Illinois	2	0.4%	2	0.6%
Virginia	2	0.4%	2	0.6%
Iowa	2	0.4%	2	0.6%
Minnesota	2	0.4%	2	0.6%
New Hampshire	1	0.2%	1	0.3%
Idaho	1	0.2%	1	0.3%
Georgia	1	0.2%	1	0.3%

Residence State / County	All Respondents		Interview Respondents	
	Number	Percent of total	Number	Percent of total
Kentucky	1	0.2%	1	0.3%
Wisconsin	1	0.2%	0	0.0%
Maryland	1	0.2%	1	0.3%
Maine	1	0.2%	1	0.3%
Total	468	100%	<u>334</u>	<u>100%</u>
Nonlocal: <u>not</u> Sumter County		59.0%		76.6%
Nonlocal: <u>not</u> Sumter, Lake, Pasco, Hernando Counties		43.4%		57.2%

3.5. Satisfaction with Visitor Experience

Respondent satisfaction based on experience in the Sumter County area is summarized in Table 3.10. In terms of things to see and do, 48% were very satisfied, 24% were moderately satisfied, 4% were not satisfied, and 25% didn't know or did not answer. For attractiveness of area, 63% were very satisfied, 14% were moderately satisfied, 1% were not satisfied, and 22% didn't know or did not answer. For quality of lodging and restaurants, 26% were very satisfied, 17% were moderately satisfied, 9% were not satisfied, and 48% didn't know or did not answer. Overall, visitors were more impressed with the area's attractiveness and activities than with the quality of lodging and restaurants.

Table 3.10. Satisfaction with trip experience reported by survey respondents

	Number of Responses	Percent of All Respondents
Things to do		
Very satisfied	237	47.9%
Moderately satisfied	117	23.6%
Not satisfied	18	3.6%
Don't know/No answer	123	24.8%
Attractiveness of the area		
Very satisfied	310	62.6%
Moderately satisfied	67	13.5%
Not satisfied	7	1.4%
Don't know/No answer	111	22.4%
Quality of lodging and restaurants		
Very satisfied	130	26.3%
Moderately satisfied	84	17.0%
Not satisfied	42	8.5%
Don't know/No answer	239	48.3%

Nearly 80% of respondents reported they are very likely to visit the Sumter County area again in the future, 14% would possibly visit again, 1% indicated it is unlikely they would visit again, and 5% didn't know or didn't answer (Table 3.11). These results show that the area is very attractive to visitors as a destination.

Table 3.11. Likelihood to visit the area again reported by survey respondents

Likely to Visit Again	Number of Responses	Percent of Responses
Very likely	395	79.8%
Possible	68	13.7%
Unlikely	7	1.4%
Don't know/No Answer	25	5.1%

3.6. Respondent Demographics

Demographics of survey respondents are summarized in Table 3.12. In terms of educational attainment, the sample was relatively highly educated, with over one third (34%) having a college degree, 19% having a graduate or professional degree, and 18% had some college, while 24% had completed high school. The survey sample was equally split between males and females. The survey sample was decidedly older in age, with 31% aged 60 to 69 years and 28% 70 to 79 years.

Table 3.12. Demographic characteristics of survey respondents

	Number of Respondents	Percent of Respondents
<u>Education Level</u>		
Primary school	3	0.6%
High school	119	24.0%
Some college	89	18.0%
College degree	169	34.1%
Graduate/Professional degree	95	19.2%
No answer	20	4.0%
<u>Gender</u>		
Male	242	48.9%
Female	246	49.7%
No answer (online)	7	1.4%
<u>Age (years)</u>		
20-29	13	2.6%
30-39	27	5.5%
40-49	37	7.5%
50-59	62	12.5%
60-69	152	30.7%
70-79	137	27.7%
80+	23	4.6%
No answer	44	8.9%

3.7. Visitor Spending

Trip spending reported by all survey respondents is summarized in Table 3.13. The overall average spending per trip was \$339. The largest spending categories were restaurants/bars (\$56.76), shopping (\$49.06), gasoline and oil (\$43.08), and other miscellaneous expenses (\$69.11), followed by food and

beverage stores, lodging, fees, entertainment, recreation gear, and rental vehicle. The standard error of total spending (\$30.45) indicates a 90% confidence interval (+/- 2 SE) of \$278 to \$400. Among non-local respondents (residing outside Sumter County) total spending averaged \$270 per trip, and \$135 per day, calculated by dividing by the average number of days stayed. The average trip spending for each respondent party was divided by the number days stayed to calculate average spending per party-day (right column of Table 3.11).

Table 3.13. Mean trip spending reported by survey respondents

Expense Category	All Respondents Mean Per Party Per Trip	Standard Error	Non-Local Respondents Mean Per Trip	Non-Local Respondents Mean Per Day
Restaurants/bars	\$56.76	\$5.31	\$47.15	\$24.78
Food/beverage stores	\$33.20	\$4.94	\$27.03	\$8.38
Lodging	\$26.95	\$5.09	\$30.36	\$8.78
Rental vehicle	\$6.49	\$2.54	\$6.99	\$1.29
Gasoline/oil	\$43.08	\$5.02	\$39.21	\$15.80
Fees	\$19.67	\$2.43	\$18.50	\$12.72
Entertainment	\$17.98	\$3.42	\$11.95	\$4.16
Recreation gear	\$16.84	\$3.61	\$13.19	\$4.30
Shopping	\$49.06	\$5.76	\$55.70	\$38.98
Other expense	\$69.11	\$8.57	\$19.74	\$15.42
Total	<u>\$339.14</u>	<u>\$30.45</u>	<u>\$269.83</u>	<u>\$134.62</u>

3.8. General Comments

Survey respondents were asked to provide general comments about the scenic byway and their experiences. All comments are compiled by survey location in Appendix D. Selected general comments that serve to characterize the visitor experience are summarized in Table 3.14. Numerous respondents at many of the locations commented that they appreciated the scenic beauty of the countryside, the undeveloped rural nature of the area, and that it is something different than other tourist attractions. Others mentioned the lack of traffic congestion, the hospitality of the local residents, the nice weather during the wintertime, and the many opportunities for learning.

Table 3.14. Selected comments from survey respondents by survey location

Car show
<ul style="list-style-type: none">• I like the ruralness of the area• I really enjoy the appearance of non-tourist Old Florida• Love Sumter County• Too many retirees here and not enough young people
Dade Battlefield
<ul style="list-style-type: none">• The land has potential for business development, need to bring more people to the area.• Wonderful weather here in Sumter County
County Fair
<ul style="list-style-type: none">• I like the ruralness of the area• More than I anticipated• The fair is a great event• The Sumter countryside is very attractive• Very friendly people and excellent food.• The fairground facilities have been significantly upgraded.• It is a joy to watch the young people• Very homey place
Horse show
<ul style="list-style-type: none">• Sumter County should retain its undeveloped rural character• A very nice equestrian facility and a very scenic drive• Absolutely beautiful countryside• The battlefield is a great education tool• Very proud of the respect accorded to the memory of the event• Very steeped in history; very knowledgeable and helpful staff
Online
<ul style="list-style-type: none">• A great concept. And a great way to see the state.• It is nice to know where you can go to experience "Old Florida".• Needs more marketing. Would have used it if I knew it existed and where it is.• This survey piqued my interest in finding out more about this byway.• We are relatively new to FL and moved to this area specifically for tandem cycling.• This area is perfect for us and cycling.• Would like to see more promotion of the Scenic Byway so I can make it a destination
Van Fleet Trail
<ul style="list-style-type: none">• I love the trail and the lack of traffic in the area.• Love the bike trail!!!
Webster market
<ul style="list-style-type: none">• Any visitors we have we bring them to the market, we love it• The area hasn't changed in 30 years

Comments received from the stakeholder and focus group interviews is summarized as follows, and a complete listing of all comments is presented in Appendix E:

- Informants confirmed that the scenic byway is viewed as an important component of local economic development efforts.
- The county is working to have more attractions to promote and boost tourism, and the byway is viewed as a means to showcase the rural character and historic assets of the area.

- It was recognized that there is a very large potential market of visitors traveling through the county on Interstate 75, and efforts are under development to encourage motorists to stop in the area.
- The Villages is a rapidly growing community of over 100,000 senior citizens in the county that continually attracts retirees into the area, who if marketed properly could become the byway's largest segment of visitors.
- Bicyclist are an important group of users for the scenic byway. The City of Webster is a focal point for trails due to developing trail projects which puts them right in the path of the Florida Coast-to-Coast Trail and in close proximity to the General James Van Fleet State Trail, and possibly connect to other trail systems to the west. Bicyclist users are an important group of users of the scenic byway and once the trail is complete, cycling groups from the Villages would come out of their community.
- It was noted that many patrons at the Webster Farmers and Flea market have a strong interest in veteran's affairs and visit the National Cemetery frequently.

4. Economic Impacts of Visitor Spending and Social Return on Investment

The survey data on spending per party-day were used to estimate total annual visitor spending in Sumter County for each expense category, calculated as the mean amount per party-day multiplied by the average number of vehicle trips on the Scenic Highway (4,985), the share of nonlocal respondents measured in the survey (59.0%), the share of respondents who reported the primary purpose of their trip was sightseeing or exploring history (14.3%) and the share of nonresident respondents who were aware of the scenic byway (17.2%). Total applicable annual spending for purposes of economic impact analysis was estimated at \$3.55 million (M), as shown in Table 4.1.

Table 4.1. Estimated annual trip spending by nonresident visitors associated with the Scenic Sumter Heritage Byway

Spending Category	Amount
Restaurants/bars	\$652,739
Food/beverage stores	\$220,807
Lodging	\$231,411
Rental vehicle	\$33,911
Gasoline/oil	\$416,389
Fees	\$335,003
Entertainment	\$109,694
Recreation gear	\$113,378
Shopping	\$1,026,851
Other expense	\$406,344
Total	<u>\$3,546,527</u>

The estimated total annual visitor spending was used to evaluate economic impacts associated with the Scenic Sumter Heritage Byway. Spending amounts were entered into the *IMPLAN* model for Sumter County in the appropriate industry sectors, as shown in Table 4.2. Values were specified as 2018 dollars, and the software applied output deflators to express in model year (2016) dollars, then indirect and induced impact results were reinflated to express in current (2018) dollars. The software also imputed direct employment for the expenditure amount based on industry average output per employee ratios.

Table 4.2. Inputs to the *IMPLAN* model for Sumter County for analysis of annual trip spending by nonresident visitors associated with Scenic Sumter Heritage Byway

<i>IMPLAN</i> Industry Sector	Industry Sales	Employment (Imputed)	Event Year	Output Deflator	GDP Deflator	Local Purchase Percentage
501 Full-service restaurants	\$652,739	13	2018	1.015	1.013	100%
400 Retail - Food and beverage stores	\$220,807	1	2018	1.003	1.013	100%
499 Hotels and motels, including casino hotels	\$231,411	3	2018	1.015	1.013	100%
442 Automotive equipment rental and leasing	\$33,911	0	2018	1.008	1.013	100%
402 Retail - Gasoline stores	\$416,389	1	2018	1.006	1.013	100%
512 Other personal services	\$335,003	4	2018	1.016	1.013	100%
496 Other amusement and recreation industries	\$109,694	2	2018	1.016	1.013	100%
404 Retail - Sporting goods, hobby, musical instrument and book stores	\$113,378	1	2018	1.006	1.013	100%
403 Retail - Clothing and clothing accessories stores	\$1,026,851	7	2018	1.006	1.013	100%
405 Retail - General merchandise stores	\$406,344	2	2018	0.998	1.013	100%

Total economic impacts of visitor spending associated with the Scenic Sumter Heritage Byway are summarized in Table 4.3. Total impacts included employment of 45 full-time and part-time jobs, \$1.39 M in labor income, \$2.02 M in value added or Gross Domestic Product, and \$3.52 M in industry output or business revenues. These estimates include direct effects of visitor spending, plus indirect multiplier effects generated through industry supply chain activity, and induced effects from employee household and government spending in the regional economic model, as described in the methods section. The employment impacts included direct effects of 33 jobs, indirect multiplier effects of 3 jobs, and induced effects of 9 jobs. These economic impacts represented 0.11% of total county employment, 0.09% of county labor income, 0.07% of county GDP and 0.07% of county industry output (refer to Table 2.4).

Table 4.3. Annual economic impacts of trip spending by nonresident visitors associated with the Scenic Sumter Heritage Byway in Sumter County, Florida

Impact Multiplier Type	Employment (Full-time and Part-time Jobs)	Labor Income (Wages, Salaries, Benefits)	Value Added (GDP)	Industry Output (Revenues)
Direct Effect	33	\$956,186	\$1,240,800	\$2,113,258
Indirect Effect	3	\$92,527	\$177,323	\$383,647
Induced Effect	9	\$341,308	\$605,283	\$1,022,643
Total Effect	<u>45</u>	<u>\$1,390,022</u>	<u>\$2,023,406</u>	<u>\$3,519,548</u>
Share of County Total	0.11%	0.09%	0.07%	0.07%

Values in 2018 dollars.

Source: *IMPLAN* trade flows model, all social accounts, Sumter County, FL, 2016 (Implan Group, LLC).

Economic impacts are broken down by major NAICS industry group in Table 4.4. The largest employment impacts occurred in the sectors for accommodation and food services (17 jobs), retail trade (13 jobs), other services (4 jobs), and arts-entertainment-recreation (3 jobs).

Table 4.4. Annual economic impacts by major industry group for trip spending by nonresident visitors associated with Scenic Sumter Heritage Byway in Sumter County, Florida

North American Industry Classification System (NAICS) Industry	Employment (Full-time, Part-time Jobs)	Labor Income (Wages, salaries, benefits)	Value Added (GDP)	Industry Output (Revenues)
11 Agriculture, Forestry, Fishing, Hunting	<1	\$155	\$158	\$339
21 Mining	<1	\$202	\$727	\$1,443
22 Utilities	<1	\$5,525	\$30,535	\$66,879
23 Construction	1	\$26,232	\$41,431	\$86,683
31-33 Manufacturing	<1	\$358	\$597	\$2,397
42 Wholesale Trade	<1	\$6,803	\$16,811	\$32,509
44-45 Retail Trade	13	\$259,006	\$482,853	\$853,851
48-49 Transportation & Warehousing	<1	\$18,030	\$21,267	\$44,447
51 Information	<1	\$4,818	\$7,905	\$26,008
52 Finance & Insurance	1	\$19,417	\$26,501	\$96,063
53 Real Estate & Rental	1	\$26,767	\$235,657	\$392,016
54 Professional, Scientific & Tech Services	1	\$32,769	\$40,173	\$109,025
55 Management of Companies	<1	\$11,224	\$14,512	\$38,398
56 Administrative & Waste Services	1	\$22,577	\$27,793	\$49,762
61 Educational Services	<1	\$6,560	\$6,996	\$11,157
62 Health & Social Services	1	\$66,433	\$78,499	\$137,102
71 Arts, Entertainment & Recreation	3	\$38,971	\$60,588	\$126,222
72 Accommodation & Food Services	17	\$385,948	\$500,643	\$948,726
81 Other Services	4	\$352,492	\$300,208	\$366,968
92 Government	2	\$105,736	\$129,555	\$129,555
Total	<u>45</u>	<u>\$1,390,022</u>	<u>\$2,023,406</u>	<u>\$3,519,548</u>

Tax revenue impacts to state-local and federal governments are shown in Table 4.5. Total state-local tax impacts were \$243,120, and total federal tax impacts were \$348,952. The largest state-local tax items were sales tax (\$83,675) and property tax (\$67,684), while the largest federal tax items were social insurance or Social Security payroll taxes for the employee contribution (\$114,375) and employer contribution (\$95,492), and personal income tax (\$101,518).

Table 4.5. State-local and federal government tax impacts of annual trip spending by nonresident visitors associated with the Scenic Sumter Heritage Byway in Sumter County, Florida

Tax Item	Amount
Dividends	\$190
Social Ins Tax- Employee Contribution	\$0
Social Ins Tax- Employer Contribution	\$0
TOPI: Sales Tax	\$83,675
TOPI: Property Tax	\$67,351
TOPI: Motor Vehicle Licenses	\$2,127
TOPI: Severance Tax	\$135
TOPI: Other Taxes	\$15,498
TOPI: S/L Non-Taxes	\$64,621
Corporate Profits Tax	\$1,722
Personal Tax: Income Tax	\$0
Personal Tax: Non-Taxes (Fines/Fees)	\$6,316
Personal Tax: Motor Vehicle License	\$1,064
Personal Tax: Property Taxes	\$333
Personal Tax: Other Tax (Fish/Hunt)	\$88
Total State and Local Tax	<u>\$243,120</u>
Social Ins Tax- Employee Contribution	\$114,375
Social Ins Tax- Employer Contribution	\$95,492
TOPI: Excise Taxes	\$16,304
TOPI: Custom Duty	\$6,151
TOPI: Fed Non-Taxes	\$776
Corporate Profits Tax	\$14,337
Personal Tax: Income Tax	\$101,518
Total Federal Tax	<u>\$348,952</u>

The Social Return on Investment (SROI) of scenic byways includes the positive economic spillovers of state monies and private economic activity. The social impact of the FSHP is composed of several elements, some of which can be measured approximately, while others would require the collection of targeted data to generate a more precise value. The value added and employment impacts in Sumter County advance the opportunities for families to thrive economically and create a tax base to allow Sumter County to invest in social services and amenities for the good of the entire community, which goes toward promoting sustainable communities. In addition, the management of the natural scenic landscapes that the tourism community finds attractive is predicated on protecting, restoring and promoting sustainable landscapes and forests.

The SROI for designation of the Scenic Sumter Heritage Byway was calculated based on the value added impact for applicable nonresident visitor spending (\$2.02 M, Table 4.3) used as the benefit, and the value of cumulative volunteer hours and FDOT technical support as the “investment”. FDOT technical support for the Scenic Highways Program since 2012 that are attributable to the Scenic Sumter Heritage Byway were estimated at \$203,000, and over the period January 2013 to April 2018 there were a total of 10,233 volunteer hours, which were valued at \$242,163 based on the federal IRS hourly rate allowed for non-profit organizations (\$22.55 to \$24.69 per hour), as shown in Table 4.6. The SROI was calculated as: [Benefit (\$2,023,406) minus Investment (\$445,163)] divided by Investment (\$445,163) equals 3.55. In other words, the annual benefit was 3.55 times the cumulative investment of volunteer time.

Table 4.6. Value of volunteer hours for the Scenic Sumter Heritage Byway, 2013–18

	2013	2014	2015	2016	2017	2018*	Total 2013-18
Total Hours	1,877	1,977	1,949	1,942	2,025	463	10,233
IRS Hourly Volunteer Rate	\$22.55	\$23.07	\$23.56	\$24.14	\$24.69	\$24.69	
Total Cost	\$42,326	\$45,609	\$45,918	\$46,880	\$49,997	\$11,431	\$242,163

*Volunteer hours through April 2018.

5. Conclusions and Recommendations

This study was intended to document the value of a FSHP designation on its local communities. To accomplish this the study attempted to assess usage patterns, experiences, and local spending by visitors to the Scenic Sumter Heritage Byway in Sumter County, Florida. This was accomplished through the use of various survey/data collection techniques including a focus group, interviews with local stakeholders, survey interviews at representative locations along the byway, and an online survey, all conducted in the last quarter of 2017 and first quarter of 2018.

The surveys and interviews with stakeholders clearly showed that many people feel very passionate about the rural and historic character and scenic beauty of Sumter County. According to survey results, respondents visited the area an average of 7.4 times per year, visited two sites along the scenic byway, stayed 26 days per year, and spent \$135 to \$170 per group-day in the area. Overall, 24% of survey respondents were aware of the Scenic Sumter Heritage Byway. Some 59% of respondents were from outside the county, indicating that the area is attractive to outside visitors from other states and counties in Florida. Among nonresident respondents, 14.3% reported sightseeing or exploring history as their primary purpose for visiting, so only this share of visitation and spending in the area can be reasonably attributed to the existence of the scenic byway.

The estimated annual economic impacts of the scenic byway included 45 jobs, \$1.39 million in labor income, \$2.02 million in Gross Regional Product and \$3.52 million in industry revenues. These impacts represented 0.07 to 0.11% of total economic activity in Sumter County in 2016. The social return on investment to the Scenic Sumter Heritage Byway is very attractive from a public policy standpoint: the value added impact was 3.55 times the cumulative value of volunteer time and technical support.

The Scenic Sumter Heritage Byway has been successful in its mission to promote tourism, showcase the outstanding natural beauty, recreational and historical resources of the area, and create a unique sense of place. The success of the Byway can be attributed to the dedicated efforts of community-minded volunteers.

Based on survey results it is recommended that advocates for the Scenic Sumter Heritage Byway support efforts to increase access to a greater diversity of food and accommodation options for travelers. Additionally, comments received during the study noted options to enhance marketing of the byway to the traveling public to increase awareness of the byway and its attractions, particularly through social media.

Future economic studies of Florida Scenic Highways should continue to refine the rigorous survey methodology employed with this study to more precisely estimate the share of economic activity that is attributable to the existence of the scenic byway. It is recommended that further research be conducted to confirm and extend these findings for other scenic highways in Florida.

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Appendix A: Glossary of Terms

Employee compensation is comprised of wages, salaries, commissions, and benefits such as health and life insurance, retirement and other forms of cash or non-cash compensation.

Employment is a measure of the number of jobs involved, including full-time, part-time and seasonal positions. It is not a measure of full-time equivalents (FTEs).

Exports are sales of goods to customers outside the region in which they are produced, which represents a net inflow of money to the region. This also applies to sales of services to customers visiting from other regions.

Final Demand represents sales to final consumers, including households, governments, and exports from the region.

Gross Regional Product (GRP) is a measure of total economic activity in a region, or total income generated by all goods and services. It represents the sum of total value added by all industries in that region, and is equivalent to Gross Domestic Product (GDP) for the nation.

IMPLAN is a computer-based input-output modeling system that enables users to create regional economic models and multipliers for any region consisting of one or more counties or states in the United States. The current version of the *IMPLAN* software, version 3, accounts for commodity production and consumption for 536 industry sectors, 10 household income levels, taxes to local/state and federal governments, capital investment, imports and exports, transfer payments, and business inventories. Regional datasets for individual counties or states are purchased separately.

Impact or **total impact** is the change in total regional economic activity (e.g. output or employment) resulting from a change in final demand, direct industry output, or direct employment, estimated based on regional economic multipliers.

Imports are purchases of goods and services originating outside of the region of analysis.

Income is the money earned within the region from production and sales. Total income includes labor income such as wages, salaries, employee benefits and business proprietor income, plus other property income.

Tax on Production and Imports are taxes paid to governments by individuals or businesses for property, excise and sales taxes, but do not include income taxes.

Input-Output (I-O) model and **Social Accounting Matrix (SAM)** is a representation of the transactions between industry sectors within a regional economy that captures what each sector purchases from every other sector to produce its output of goods or services. Using such a model, flows of economic activity associated with any change in spending may be traced backwards through the supply chain.

Local refers to goods and services that are sourced from within the region, which may be defined as a county, multi-county cluster, or state. Non-local refers to economic activity originating outside the region.

Margins represent the portion of the purchaser price accruing to the retailer, wholesaler, and producer/manufacturer, in the supply chain. Typically, only the retail margins of many goods purchased by consumers accrue to the local region, as the wholesaler, shipper, and manufacturer often lie outside the local area.

Multipliers capture the total effects, both direct and secondary, in a given region, generally as a ratio of the total change in economic activity in the region relative to the direct change. Multipliers are derived from an input-output model of the regional economy. Multipliers may be expressed as ratios of sales, income, or employment, or as ratios of total income or employment changes relative to direct sales. Multipliers express the degree of interdependency between sectors in a region's economy and therefore vary considerably across regions and sectors. A **sector-specific multiplier** gives the total changes to the economy associated with a unit change in output or employment in a given sector (i.e. the **direct economic effect**) being evaluated. **Indirect effects multipliers** represent the changes in sales, income, or employment within the region in backward-linked industries supplying goods and services to businesses (e.g., increased sales in input supply firms resulting from more industry sales to final customers). **Induced effects multipliers** represent the increased sales within the region from household spending of the income earned in the direct and supporting industries for housing, utilities, food, etc. An **imputed multiplier** is calculated as the ratio of the total impact divided by direct effect for any given measure (e.g. output, employment).

Other property income represents income received from investments, such as corporate dividends, royalties, property rentals, or interest on loans.

Output is the dollar value of a good or service produced or sold, and is equivalent to sales revenues plus changes in business inventories.

Producer prices are the prices paid for goods at the factory or point of production. For manufactured goods, the purchaser price equals the producer price plus a retail margin, a wholesale margin, and a transportation margin. For services, the producer and purchaser prices are equivalent.

Proprietor income is income received by non-incorporated private business owners or self-employed individuals.

Purchaser prices are the prices paid by the final consumer of a good or service.

Region or Regional Economy is the geographic area and the economic activity it contains for which impacts are estimated. It may consist of an individual county, an aggregation of several counties, a state, or an aggregation of states. These aggregations are sometimes defined on the basis of worker commuting patterns.

Sector is an individual industry or group of industries that produce similar products or services, or have similar production processes. Sectors are classified according to the North American Industrial Classification System (NAICS).

Value Added is a broad measure of income, representing the sum of employee compensation, proprietor income, other property income, indirect business taxes and capital consumption (depreciation), that is comparable to Gross Domestic Product. Value added is a commonly used measure of the impact an industry makes to a regional economy because it avoids double counting of intermediate sales.

Appendix B: Scenic Sumter Heritage Byway Onsite Interview Survey Questionnaire

*For this survey, we'd like you to focus on your experience visiting this area [show map to illustrate].
First, we have a few questions about your visit to this location today.*

1. Are you aware of the *Scenic Sumter Heritage Byway*? ☐ Yes ☐ No [skip to Q3] ☐ Not sure/Refused [skip to Q3]

2. How did you find out about this place or event? [check any that apply] ☐ Media story ☐ Byway map
 ☐ Word of mouth ☐ Social media ☐ Not sure/Refused ☐ Other:

3. Did you plan in advance to visit this location today? ☐ Yes ☐ No ☐ Not sure/Refused

4. Are you in the area today on a "day trip" with plans to return home today, or are you spending one or more nights away from home? ☐ Day trip [Skip to Q7] ☐ Staying overnight ☐ Not sure/Refused

5. How many total nights on this trip will you spend in the area? Number of nights: _____ ☐ Not sure/Refused

6. What type of overnight accommodations are you primarily using on this trip? [select one]
 ☐ Hotel or motel ☐ Bed & Breakfast ☐ Condo/Apartment/House
 ☐ Campground/RV park ☐ Stay with friends/family ☐ Not sure/Refused
 ☐ Other (describe): _____

7. How many adults, including yourself, and how many children are in your immediate party on this trip?
 Number of adults (age 18 or older): _____ ☐ Not sure/Refused
 Number of children: _____ ☐ Not sure/Refused

8. What are the purpose(s) of this trip to the area today? [Check all that apply. Do not read]
 ☐ Sightseeing along the highway ☐ Visiting a specific site along the highway
 ☐ Exploring history of the area ☐ Experiencing the rural community of the area
 ☐ Visiting a nearby city ☐ Using a trail (hiking, cycling, horseback riding)
 ☐ Visiting family, friends, or relatives ☐ Fishing, hunting or boating
 ☐ Attending a community event ☐ Attending a personal event
 ☐ Not sure/Refused
 ☐ Other (describe): _____

9. We're currently at this location [show on map]. Did you or are you planning to visit any other places in the Sumter County area on this trip? If so please name them or show on the map [Check any below or list others]
 ☐ Florida National Cemetery ☐ Sumter County (Webster) farmers and flea market
 ☐ Dade Battlefield Historic State Park ☐ Shady Brook Greenway Park
 ☐ Rutland Park ☐ Historic Pana Vista Lodge
 ☐ Historic Sumter County Courthouse ☐ General James Van Fleet State Trail
 ☐ Richloam Wildlife Management Area ☐ Florida Bass Conservation Center
 ☐ Marsh Bend Outlet Park ☐ Sumter County Fairgrounds
 ☐ Do not know/refused ☐ Other
 [list]: _____

10. Is this your first trip to this area? ☐ Yes [Skip to Q12] ☐ No ☐ Not sure/Refused

11. How many trips did you take to this area in the past 12 months? _____ ☐ Not sure/Refused

12. How likely is it that you will return to this area for future visits?
 ☐ Very likely ☐ Possible ☐ Unlikely ☐ Not sure/Refused

13. Will you share your experience on this trip with friends or family?

☐ Yes ☐ No [skip to Q15] ☐ Not sure/Refused [skip to Q15]

14. How will you share your experience about this trip with others? [check any]

☐ Word of mouth ☐ Social media ☐ Not sure/Refused ☐ Other: _____

15. Please rate how satisfied you are with the following aspects of the areas you visited on this trip.

How satisfied are you with...	Very Satisfied	Moderately Satisfied	Not Satisfied	Don't Know	Not Applicable
Variety of things to see and do	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attractiveness of scenery and natural areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of lodging and restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16. Please estimate how much your party has spent or will spend in the local area (Sumter County) on this trip in the following categories [Check appropriate range or enter specific amount]

Expense item	Zero	\$1 to \$9	\$10 to \$24	\$25 to \$49	\$50 to \$99	\$100 to \$249	\$250 to \$499	\$500 or more	Specific amount (\$)
Restaurants/bars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Food/beverages at stores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Lodging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Rental vehicle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Gasoline/oil	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Fees (parking, admission, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Entertainment (attractions, concerts, movies)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Recreation gear (fishing, boating, cycling)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Shopping (clothing, gifts, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Other expense (describe below)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Other specific expenses/purchases:									

Finally, we have a few questions about your background.

17. What is your home zip code? _____ ☐ Foreign resident ☐ Refused

18. In what year were you born? _____ ☐ Refused

19. What is the highest level of education you completed?

- ☐ Primary school (through 9th grade) ☐ College degree (associate's or bachelor's)
☐ High school diploma or GED ☐ Graduate/Professional degree
☐ Some college, no degree ☐ Refused

20. Respondent gender [Interviewer record, do not ask] ☐ Male ☐ Female

21. Do you have any general comments about your experience as a visitor to this area? [enter below]

That completes our survey. Thank you very much for your time and participation. Please accept this token of our thanks.

Survey date: _____ Location: _____

Interviewer: _____

Appendix C: Scenic Sumter Heritage Byway Online Survey Questionnaire

Florida Scenic Highways

First, we have a few questions about Florida's Scenic Highway Program.

1. How familiar are you with the "Florida Scenic Highway Program" and the byways that make up the program?
[single: Very familiar, Somewhat familiar, Not at all familiar, Not sure, Prefer not to answer]

Just to be sure everyone has the same understanding, the byway collection includes 26 state designated scenic highways in Florida. Of these, six are further designated at a federal level as National Scenic Byways, and the Florida Keys Scenic Highway is designated as an All American Road." These byways are shown on the map below.



2. Have you ever engaged in any of the following activities on Florida's scenic highways? [Please mark ALL that apply.]
 - ☐ Motorcycle riding
 - ☐ Bicycle riding
 - ☐ Antique or sports car driving
 - ☐ Other (describe): _____
 - ☐ Not sure
 - ☐ Prefer not to answer

Scenic Sumter Heritage Byway

Next, we have some more specific questions about the Scenic Sumter Heritage Byway.

Located in the center of the state, south of Ocala and northwest of Orlando, the Scenic Sumter Heritage Byway winds its way through several old Florida roadways and communities of Sumter County, as shown on the map below.



3. More specifically, are you aware of the *Scenic Sumter Heritage Byway* in Sumter County, Florida? [YNDR]
[If NO, Not sure, Prefer not to answer → GO TO Q5 intro]

IF YES:

4. How did you find out about the *Scenic Sumter Heritage Byway*? [Please mark ALL that apply.]
- ☐ Media story
 - ☐ Byway map
 - ☐ Scenic highway road sign
 - ☐ Word of mouth
 - ☐ Social media
 - ☐ Other: (please describe)
 - ☐ Not sure
 - ☐ Prefer not to answer
5. How many times during the past year have you visited any locations on, or traveled along, the *Scenic Sumter Heritage Byway*?
- Number of visits: [#, DR]
- [If 0, Not sure, Prefer not to answer → GO TO Q15]
6. Did you stay overnight in the Sumter County area on any of those trips? [YNDR]

[If 0, Not sure, Prefer not to answer → GO TO Q8]

- 6A. How many nights did you stay overnight in the Sumter County area while visiting or traveling the *Scenic Sumter Heritage Byway* in the past year? [#, DR]

7. What type of overnight accommodations did you primarily use when staying in the area? [Please select one response.]
- ☐ Hotel or motel
 - ☐ Bed & Breakfast
 - ☐ Condo/Apartment/House
 - ☐ Campground/RV park
 - ☐ Stay with friends/family
 - ☐ Other (describe): _____
 - ☐ Not sure
 - ☐ Prefer not to answer
8. What were the purpose(s) of your visits to the area? [Please mark ALL that apply.]
- ☐ Sightseeing along the highway
 - ☐ Visiting a specific site along the highway
 - ☐ Exploring history of the area
 - ☐ Experiencing the rural community of the area
 - ☐ Visiting a nearby city
 - ☐ Using a trail (hiking, cycling, horseback riding)
 - ☐ Visiting family, friends, or relatives
 - ☐ Fishing, hunting or boating
 - ☐ Attending a community event
 - ☐ Attending a personal event
 - ☐ Other (please describe)
 - ☐ Not sure
 - ☐ Prefer not to answer
9. Did you engage in any of the following activities on the *Scenic Sumter Heritage Byway* in the past year? [Please mark ALL that apply.]
- ☐ Motorcycle riding
 - ☐ Bicycle riding
 - ☐ Antique or sports car driving
 - ☐ Other (please describe)
 - ☐ Not sure
 - ☐ Prefer not to answer
10. During the past year, did you visit any of the following places along the *Scenic Sumter Heritage Byway*? [Please mark ALL that apply.]
- ☐ Florida National Cemetery
 - ☐ Sumter County (Webster) farmers and flea market
 - ☐ Dade Battlefield Historic State Park
 - ☐ Shady Brook Greenway Park
 - ☐ Rutland Park
 - ☐ Historic Pana Vista Lodge
 - ☐ Historic Sumter County Courthouse
 - ☐ General James Van Fleet State Trail
 - ☐ Richloam Wildlife Management Area
 - ☐ Florida Bass Conservation Center
 - ☐ Marsh Bend Outlet Park
 - ☐ Sumter County Fairgrounds
 - ☐ None of the above
 - ☐ Other (please describe)
 - ☐ Not sure
 - ☐ Prefer not to answer

11. Please rate how satisfied you were with the following aspects your visit(s) to the area during the past year.

How satisfied are you with...	Very Satisfied	Moderately Satisfied	Not Satisfied	Don't Know	Not Applicable
Variety of things to see and do	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attractiveness of scenery and natural areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of lodging and restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. How many people were in your immediate party of family or friends on your most recent trip to the Sumter County area in the past year? [#, DR]

13. Please estimate the amount that you and your immediate party spent in the Sumter County area on your last visit during the past year by either checking the appropriate range, or entering a specific amount:

Expense item	Zero	\$1 to \$9	\$10 to \$24	\$25 to \$49	\$50 to \$99	\$100 to \$249	\$250 to \$499	\$500 or more	Specific amount (\$)
Restaurants/bars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Food/beverages at stores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Lodging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Rental vehicle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Gasoline/oil	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Fees (parking, admission, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Entertainment (attractions, concerts, movies)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Recreation gear (fishing, boating, cycling)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Shopping (clothing, gifts, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Other expense (describe below)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Other specific expenses/purchases:									

14. Have you shared your experiences on the *Scenic Sumter Heritage Byway* with friends or family? [YNDR]

IF YES:

- 14A. How did you share your experiences with others? [Please mark ALL that apply.]

- ☐ Word of mouth
☐ Facebook
☐ Instagram
☐ Twitter
☐ Other Social media (please describe)
☐ Other (please describe)
☐ Not sure
☐ Prefer not to answer

15. How likely is it that you will visit the *Scenic Sumter Heritage Byway* in the future? [single: Very likely, Somewhat likely, Not at all likely, Not sure, Prefer not to answer]

Demographics

Finally, we just have a few demographic questions to be sure we've heard from all kinds of travelers.

16. What is your home zip code? [#, Not a resident of the US, Prefer not to answer]
17. In what year were you born? [Year, Prefer not to answer]
18. What is the highest level of education you completed? [single: Less than high school; High school diploma or GED; Attended college, did not receive a degree; College degree (associate's or bachelor's); Graduate or Professional degree; Prefer not to answer]
19. What is your gender? [Male, Female, Prefer not to answer]

20. Would you like to provide any general comments about your experience as a visitor on Florida's Scenic Highways?
[YNDR]

IF YES: 20A. Please share your comments: [text, DR]

That completes our survey. Thank you very much for your time and participation. For any questions about this survey, please contact the investigators:

Alan Hodges, email awhodes@ufl.edu, tel. 352-294-7674

Mike Scicchitano, email mscicc@ufl.edu, tel. 352-392-0262

Appendix D: Open-Ended Comments by Survey Respondents

Question / Survey Location / Comment	Number of Respondents
Activities	22
Online	22
Auto driving	1
Car	2
Car ride	1
Car/foot	1
Driving my not so special car.	1
Driving personal car	1
Hiking	1
Historic tour	1
Horseback	1
Horseback riding	1
I just happen to drive on the Scenic Byway in Sumter constantly during the week; I live just 2 miles from the Byway	1
My spouse and I enjoy a drive along the Scenic Sumter Historic Byway in our Jeep with the top down	1
My spouse and I enjoy hiking the Half Moon WMA and biking the Van Fleet State Trail	1
Non-sports car driving	1
Normal travel	1
Regular auto driving	1
Riding in car, stopping and taking pictures	1
Sight seeing	1
Traveled along a few of them with friends	1
Traveled using a regular automobile	1
We have taken our automobile	1
How found out	29
Dade Battlefield	3
Live here in area	2
Website	1
County Fair	7
Third time	1
Go to the fair every year	1
Have known for 30 years	1
Live close	1
Live here in area	2
Wildwood	1
Horse show	4
4-H	1
Campground	1
Motorcycle club	1
Sister	1
Online	7
At SPCA event and an event at The Villages, Brown wood	1
Attended public meetings	1
I live just 2 miles from the Byway; travel it 2X daily going to work	1
Internet search	1
Leadership Sumter Class of 2012	1
Located on it	1
While attending Sumter County Master Gardener program	1
PanaVista Lodge	5
Been coming here for 20 years	1
Born here in this area	1
Have been here before	1
Have known all my life	1
Live here in area	1
VanFleet	1
Found by accident and then researched	1
Webster market	2
Fort King (Ocala)	1
Wholesale literature	1
Other Places	5
County Fair	1
Visiting a new residential development	1

Question / Survey Location / Comment	Number of Respondents
Horse	1
Friends in Apopka	1
Online	2
Horseback rides	1
We drove many of the "Scenic" designated roads just for fun...	1
Webster market	1
Car show	1
Purpose of trip	97
Car show	18
Buy parts	2
Day out, retired	1
Find parts for car	1
Get away from snow	1
History	1
I race bikes at Daytona for Bike Week	1
Look at stuff	1
Looking for auto parts	1
Looking for parts	1
Retired	1
Shop	1
Show	1
Vacation/warm weather	1
Warm weather	4
Dade Battlefield	25
Browse	1
History	2
Shop	4
Shopping	11
Shopping at flea market	1
Shopping, exercise	1
Vendor	2
Vendor at flea market	2
Visiting the flea market	1
County Fair	7
Cattle show	1
Cow show	1
Entertainment	1
Fair, steer show	1
Historical	1
Scenery	1
the Fair, cows	1
Horse show	16
Attend flea market	1
Seasonal travelling	1
Sell goods	1
Shop	1
Shopping	5
Vendor	6
Warm weather	1
Online	7
I live in Sumter County 2 miles from the Byway and travel it frequently	1
I have lived in Sumter County my entire life	1
I ride with Sumter Landing Bicycle Club (Villages, FL). Have ridden some roadways many times, but didn't realize they were part	1
Live and work here in Sumter County	1
Live here	1
Native plant shopping	1
Traveling to and from our jobs	1
PanaVista Lodge	5
History	1
Housesitting for hosts who were called away due to emergency	1
Live here	1
Own business (Pana Vista Lodge)	1
Snowbirds	1

Question / Survey Location / Comment	Number of Respondents
Van Fleet trailhead	9
Boogie in the boondocks	2
Cycling	2
Geocaching	1
Historical	1
History	1
Recreation	1
Sunshine	1
Webster market	10
Browsing	1
Driving by	1
Just to look around flea market	1
RV Club	1
Shop	1
Shopping	3
Vendor at flea market	1
Visit from out of towners	1
General	150
Car show	23
Admission high	1
Cleaner than it has been in past, washrooms are cleaner this year	1
Event wasn't advertised well	1
Good place to come for the day	1
Good so far	1
Great place to live	1
Great place, great event	1
I like the ruralness of the area	1
I love it	1
I really enjoy the appearance of non-tourist Old Florida	1
Local people should have open mind about event	1
Love Sumter County	1
Love the event	1
More food vendors	1
More seating	1
More signs	1
Nice area	1
Pretty area	1
The car show did not have as many selections as before, vintage auto parts were over priced	1
Too many retirees here and not enough young people	1
Very relaxing area	1
We have come back for 10 years	1
Wonderful area	1
Dade Battlefield	10
Chance to walk	1
Fast growing	1
Feels intimidated by the prevalence of Confederate memorabilia at the flea market and environs	1
Glad to be here	1
Great flea market	1
Keep preserving history	1
Nice area	1
The land has potential for business development. Need to bring more people to the area.	1
Vending at the market this year is sparse, worried that the market may close down	1
Wonderful weather here in Sumter County	1
County Fair	21
Animals seem well taken care of	1
Beautiful	1
Born and raised in Sumter County and I love it	1
I enjoyed the artwork of the school children	1
I like the ruralness of the area	1
It's very authentic - enough to bring people back [Note: Respondent works for Tampa Bay History Center]	1
Love it here, more adult rides	1
Love Sumter County	1
More choices in restaurants	1
More than I anticipated	1

Question / Survey Location / Comment	Number of Respondents
Nice place	1
People are friendly	1
Pretty nice place	1
Prices are high	1
County does a good job keeping up parks and public spaces; voting precincts outside of city limits are well kept up as well	1
The fair is a great event	1
The Sumter countryside is very attractive	1
Very clean, well-organized, and very enjoyable	1
Very friendly people and excellent food; fairground facilities have been significantly upgraded; a joy to watch the young people	1
Very homey place	1
Wonderful area	1
Horse show	46
Sumter County should retain its undeveloped rural character	1
A very nice equestrian facility and a very scenic drive	1
Absolutely beautiful countryside	1
Beautiful country	1
Beautiful countryside	1
Beautiful horses	1
Beautiful landscape	1
Beautiful place (Sumter County) and cemetery is well managed	1
Best event in area	1
Best market	1
Enjoyed it - overwhelmed by the number of people present	1
Fantastic	1
Fun and laid-back area	1
General climate; especially weather better than Pennsylvania	1
Great experience and always introducing new visitors to the area	1
Great idea to have horse shows, brought us in	1
Great seasonal locale	1
Here as medic, I like the event, the owners	1
I love the area	1
I will definitely return	1
It's beautiful and well organized	1
Less recreation needed in area, there is too much construction making driving difficult	1
Love the area	1
Love the weather, great prices, friendly people	1
Love this area	1
Need bigger crowds for WAA	1
Needs more publicity about historical significance	1
Nice facility	1
Nice place	1
Nice place to visit	1
Quality of ceremony very high	1
Should be advertised more	1
Sumter has many attractive areas	1
The area is growing in a positive direction	1
The battlefield is a great education tool	1
The event is very well organized	1
Very friendly people and relaxed environment	1
Very nice place	1
Very peaceful	1
Very pleasant place	1
Very proud of the respect accorded to the memory of the event	1
Very steeped in history; very knowledgeable and helpful staff	1
We enjoy coming here	1
We like it	1
We like it here	1
We really enjoy it!	1
Online	20
A great concept. And a great way to see the state	1
Due to our experience on Sumter Byway, we have a trip planned in April to Fernandina Beach to travel scenic byway in that area	1

Question / Survey Location / Comment	Number of Respondents
Assure that bicycle trails are developed, or road shoulders are added or maintained, as well as "share the road" signs for bicycles	1
Beautiful experience	1
I don't know where the Sumter Scenic Highway is, so I'm not sure if I would ever use it	1
Thought this was an anonymous survey; don't want to give demographic data; looks suspicious	1
I will look into the Byway in the near future	1
It is nice to know where you can go to experience "Old Florida"	1
Just moved here and plan on exploring more of what Florida has to offer	1
Moved to Florida in 2016; look forward to exploring my new home state	1
Needs more marketing; would have used it if I knew it existed and where it is	1
Now that I know about it, will experience it	1
Area is perfect to relax/sightsee and not too far to get away from urban setting discover more natural Florida each time I go	1
This survey piqued my interest in finding out more about this byway	1
This worthwhile program needs more publicity	1
Was unaware of the scenic highways; will explore our opportunities; thank you	1
We are relatively new to FL and moved to this area specifically for tandem cycling; this area is perfect for us and cycling	1
When will bike path from Orange County cross through Sumter County be started and completed; I love the Van Fleet trail	1
Work is needed in the Florida Keys	1
Would like to see more promotion of the Scenic Byway so I can make it a destination	1
Pana Vista Lodge	5
Enjoy the park and the water sports	1
Fantastic activity	1
Very enjoyable place, weather and people are both nice	1
Very relaxing and quiet atmosphere	1
We love it	1
Van Fleet trailhead	13
Bay Lake bathroom is a disaster	1
Clean, people are friendly, very satisfied	1
Dogs on roads (700 level roads) are potential hazard, I lead weekly rides at this site (on Wednesdays)	1
Enjoyable cycling infrastructure and nearby Clermont has hilly terrain good for cycling	1
I like the parks, lodging is difficult	1
I love the trail	1
I love the trail and the lack of traffic in the area	1
Looking for coast to coast trail	1
Love the bike trail!!!	1
Much safer to ride on the trail due to lack of automobile traffic	1
Pleasantly surprised by event	1
Use cycling as an emphasis for people from Orange and Lake	1
We enjoy the area	1
Webster market	12
A very pleasant culture shock	1
Any visitors we have we bring them to the market, we love it	1
Flea market has declined over the years	1
Glad the sun's out, like re-enactments	1
I have enjoyed coming here for the last 20 years	1
Interesting place, I like it	1
Nice atmosphere, variety	1
Nice place	1
The area hasn't changed in 30 years	1
The flea market needs overall improvement, the wholesale section needs to adhere to regulations	1
Very good and large flea market	1
We like this place very much	1
How share experience	13
Car show	1
Texting	1
County Fair	2
Docent education	1
Photos	1
Horse show	4
Clubs	1
Photos	1

Question / Survey Location / Comment	Number of Respondents
Telephone	1
Will show my family photos	1
Online	3
EMAIL	1
text	1
Text and text pictures	1
Van Fleet trailhead	2
Pictures	1
With club-Florida Freewheelers	1
Webster market	1
Correspondence	1
Overnight accommodations	5
Horse	1
Second home	1
Online	4
I live in home in Sumter County in The Villages	1
My home	1
My House	1
My husband and I live along the Sumter Byway.	1

Appendix E: Comments from Local Stakeholders and Focus Group Participants

Local Stakeholder Interview Comments

Sumter County Administrator. The scenic byway ties to the county tourism strategy. No visitor studies have been done. The County is trying to get critical mass of attractions to boost tourism. For example, Gator World is a new attraction in the area on Highway 44 that is advertised on I-75 billboards. The Villages is a big draw, particularly for Caucasian seniors from the Midwest and Northeast U.S. The scenic byway connects to the coast-to-coast trail at Van Fleet Trail, which is used by cyclists and equestrians. Peak season for cycling is December through February. Webster is a focal point for trails. The Villages has 3 cycling clubs. Good events for conducting public surveys would include the Christmas parades in Webster and Panasoffkee, Dade Battlefield, and the National Cemetery motorcycle veterans' wreath laying event. Questions on the survey regarding income, education, and employment may be sensitive to respondents.

Sumter County Commissioner. The Villages population is 100,000+ and growing, and has been a disruptive force in the county. The scenic byway is an outlet for Villages residents who generally have low awareness of resources and history of Sumter County. Proponents of the byway need to do a better job of promoting it to these residents.

Chair of the Sumter Scenic Heritage Byway Steering Committee. A study was done on the Coast-to-Coast trail about alignment. The Flea market is mostly patronized by nonlocal people. The scenic byway has a Facebook page. Black Kow (compost) is a sponsor of byway events. Could add questions to survey about whether respondents have seen map or road signs, whether they plan to make a return visit, whether visitors will share their byway experiences via social media or other means.

Webster City Administrator. The city is growing slowly. It has been working to get a cycling trail through the city. There is not much engagement with the scenic byway by the local business community. Many visitors are seeking to experience the rural character of the area. The scenic byway has a kiosk at the Webster market, which would be a good survey location. Other good venues for surveys would be the Webster Farm Supply store, the Sumter County Fair, and the motorcycle meet in February in connection with the Sumter Swap Meet. A question for the survey would be what brings visitors back again?

Manager Sumter County Farmers and Flea Market. The market was established in 1937, and is the third largest livestock market in Florida, with \$85 million in annual livestock sales for 90,000 head of cattle. There are typically 50-75 people attending sales, including some spectators besides ranchers

and buyers. Flea market attendance is 10,000 to 15,000 during winter months. The market has 40 acres of space, 2,000 vendors from all over world. It is open 7am until about 1pm. Many market shoppers also visit the National Cemetery. The market is declining because of internet.

Focus Group Comments

What is your favorite part of the byway?

- Some participants were only vaguely aware of the route of the scenic byway. Because of the lack of awareness, most participants really did not have a “favorite” part.
- “Driving into Sumter County is so beautiful”.
- Good to preserve heritage in the county.
- Didn’t know the byway existed until recently, even though he was born and raised in the county.

How does the byway affect your particular community or business?

- The byway did not affect any of these participants directly.
- The byway attracts outside visitors to the county.
- Byway is a source of pride.
- Have heard complaints about trash on the byway.
- Need to raise more awareness about the byway.
- Byway draws bicyclists from Lake County.

What is the profile of typical byway visitors in terms of home location, age, income, education, group type, group size, interests, etc.?

- Byway users are an older demographic. County has highest average age in the U.S.
- Would be great to attract more young people and people from inside the county.
- Big potential to attract more people from The Villages because retired persons have more time available.

How do visitors to Sumter County find out about the byway? Ask about road signs, social media, interpretive kiosks, maps, pamphlets, word of mouth.

- Lake County is actively promoting the byway to young outdoor types.
- Should promote the byway more on social media. “Social media is everything”.
- People see the scenic highway signs and byway maps.
- Also hear through word of mouth.
- The Villages Daily Sun is an important print and online publication. “Can’t ignore the newspaper”.

How do byway visitors typically experience the byway? Ask about routes followed, mode of travel, time of year, length of stay, number sites visited, events attended, spending, repeat visits, etc.

- Getting people from the Villages to come to south part of Sumter County would be huge.
- One participant leads monthly hikes in the area: 99% of hikers are from The Villages.
- “People are looking for more” (things to do and see).
- Need to have more unique shops as an attraction.
- Should be more local businesses on the byway map.
- Could gain sponsorships for better advertising.
- Put maps in Villages recreation centers.
- Bicycling on the byway is not safe, byway could be made more biker friendly.
- Could indicate bike friendly segments of the byway on the map.
- Most visitors are driving through, do not stay overnight.
- Only a few Bed & Breakfast establishments in the area.
- Former mayor of Webster was actively involved in the byway.
- Swap meet in Webster is very popular.
- Webster flea market is a big attraction.

Do local county residents experience the byway differently than visitors? Has the presence of the byway shaped residents view of the county as a tourism destination?

- Participants generally could not answer this question. Most of the talk was about what could be done to better promote the byway.
- Most locals don’t know about the byway.
- There is an opportunity for more awareness (among locals).
- The byway is very scenic.
- “It gives you a feel for the area”.
- History is a key theme.
- Byway signs show “something is there”.
- Would be nice to have a better brochure to accompany the byway map.
- A large visitor map is done by Chamber of Commerce (participant showed copy of this and the small map/brochure).
- “I love maps. We don’t get them any more” (in this age of smart phones).
- Maps are a great visual aid.
- Map/brochure needs more current information.
- Put stars on the map to indicate points of interest, and have color key to mapped points of interest.
- Could have larger maps for southern and northern sections of the byway.

- Mobile apps would be helpful to attract visitors and keep them longer. (e.g. Disney/Universal has app to show where you are in the theme park, waiting times, etc.).
- Apps can be distributed easily, and anybody under 60 can use an app.
- Advertise the app on road signs.

What words to people use when talking about the byway experience?

- The byway highlights open space and agriculture
- Truck traffic is incompatible with biking.
- Could have centers for bicyclists.
- Should promote fishing at points of interest.
- Fishing clubs at The Villages go to the Bass Conservation Center.
- There is an annual fishing event or kids at the Bass Center (Apr. 7 this year).
- Van Fleet trail is really the only safe place to bike.
- Motorcycle groups love the byway.

How do byway visitors share their experience with others?

- Social media is the main mode of sharing experiences.
- Photos are important means of sharing. For example, motorcycle groups stop to take photos of themselves along the byway.

What physical improvements or promotions are needed to increase awareness, and use of the byway?

- Internet coverage is spotty in some areas. Some dead zones.
- Provide signs for photo points.
- An outdoor amphitheater with regular music events and food trucks would be great.
- County roads 757 and 772 are highly scenic, and should be added to the byway.
- Road 757 would be a good route for cyclists.
- Road 772 would be an alternate to State Highway 50, which is very high-speed traffic and not very scenic.
- An annual byway event would be good.
- Congressman Webster can write letters of support for federal projects to improve the byway.

Appendix F: Scenic Sumter Heritage Byway Fact Sheet



Byway Fact Sheet

Mission Statement It is our mission to promote and protect the natural beauty, recreational potential and outstanding historical resources and traditions of the Scenic Sumter Heritage Byway for residents, visitors, and future generations.

Byway Vision

It is our vision that the synergy developed through strong partnerships, education and resource advocacy creates a nationally recognized byway that showcases the natural, scenic, recreational, and heritage resources of Sumter County, and that community decisions are based in part on these special values.

Organization History

The organization began as a Community Action Group in March 2009 in partnership with the Sumter County chamber of Commerce with the express purpose of improving the southern entrance to Sumter County, therefore enhancing the visitor experience to the National Cemetery. The Veteran's Memorial Highway was designated soon afterwards, and pursuit of a Florida Scenic Highway designation began. A Corridor Advocacy Group (CAG) began meeting with the Florida Department of Transportation's (FDOT) District Five Scenic Highways Coordinator in order to pursue the "Scenic" classification for a series of roads within Sumter County that encompass the communities of Webster, Bushnell, Sumterville, Lake Panasoffkee, Carlson, Rutland and the surrounding areas.

Byway Accomplishments

- Published Byway newsletter
- Hosted multiple Antique Appraisal Fairs
- Received 501(c)(3) July 2014
- Participation in various events along the corridor
- Adopt-a-Highway Program, Sumter County
- Active Participation in the long range planning for the Florida Coast to Coast Rail Trail planning effort
- Established Byway website

Corridor Story

The roads that comprise our Byway include a cross section of the natural beauty with which Sumter County is blessed. From south to north, the Byway traverses pastoral farmlands, cattle ranches and horse farms with lush open fields. The corridor then passes through several of the most interesting small country towns in the region, and finally travels through the lush hardwood hammock and floodplain parklands that are part of the Withlacoochee River watershed. This Corridor highlights the scenic view and rich heritage of Sumter County through Byway travel.

Attractions include:

- General James Van Fleet Trail State Park
- Richloam Wildlife Management Area (WMA)
- Dade Battlefield Historic State Park
- Florida National Cemetery
- Lake Panasoffkee
- Withlacoochee River
- Half Moon WMA

Contact

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Visit our website at: www.sumterbyway.com



Fall 2018

Appendix G: Highway Improvements in Sumter County, Florida

Florida Department of Transportation District Five Projects

(source: <http://www.cflroads.com/projects/County/Sumter/>)

US 301 Study (project 430132-1). Project Development and Environment (PD&E) study evaluating the widening of US 301 from County Road (CR) 470 East to State Road (SR) 44, a distance of approximately 7.8 miles. This includes evaluating the need to realign US 301 around the City of Coleman to lessen the movement of heavy truck traffic through that community, with all viable alternatives and alignments considered. A PD&E study is the FDOT's process for adhering to the National Environmental Policy Act and related federal and state statutes. This process involves preliminary engineering to determine multi-use trail concepts, environmental evaluations to assess impacts associated with a new multi-use trail, and extensive public involvement and agency coordination.

C-470 Study (434912-1). A PD&E study was initiated to consider improvements to C-470 from C-527 to the Florida Turnpike (SR-91), a distance of approximately 10.5 miles in Sumter and Lake Counties, Florida. This includes a possible realignment of C-470 East/ C-470 West at SR-35 (US 301) to include necessary improvements to SR-471 in the community of Sumterville.

South Sumter Connector Trail Study (435471-1). The South Sumter Connector Trail PD&E study is being conducted to evaluate a multi-use trail that will close the 22-mile gap between the Good Neighbor Trail in Hernando County and the Van Fleet Trail in Sumter County. The South Sumter Connector Trail is part of the larger Coast to Coast Trail, which extends approximately 250 miles across the peninsula of Florida from the Gulf of Mexico in St. Petersburg to the Atlantic Ocean in the vicinity of the Canaveral National Seashore.

I-75 at CR 514 Study (435476-1). This is a PD&E study to evaluate a new interchange near the Interstate 75 (I-75) at County Road (CR) 514 (Warm Springs Avenue) overpass. The project area is located approximately 4.0 miles south of the I-75 and Florida Turnpike interchange and approximately 3.5 miles north of the I-75 at CR 470 interchange in Sumter County. The project limits extend north and south along I-75 at CR 514 and along CR 514 from 0.5 mile west of I-75 east 0.75 mile to the CR 525 Extension. CR 514 is a two-lane, undivided, local roadway that crosses over I-75 at the project location. The purpose of this project is to improve the existing transportation network and support regional travel demand by providing additional access to I-75 at C.R. 514. The planned Florida Crossroads Industrial Activity Center (FCIAC) will serve as an intermodal freight logistics center and distribution hub, contributing to projected future travel demand in the region. In addition, residential development is expanding from the north and east toward the project area, increasing the amount of traffic in the region, such that the existing transportation facilities in the project and surrounding area will be unable to support projected future demand.

SR 50 from US 301 in Hernando County to CR 33 in Lake County Study (435859-1). The State Road (SR) 50 PD&E study is being conducted to evaluate transportation improvements to the approximately 20-mile section of S.R. 50 between U.S. 301 in Hernando County and County Road 33 in Lake County. This study will follow the State Environmental Impact Report (SEIR) process involving preliminary engineering to determine roadway and intersection concepts, environmental evaluations to assess impacts, and significant public involvement with agency coordination. The study is specifically looking at options such as widening to four-lanes, the addition of passing lanes, or a combination of these improvements. A corridor planning study, which began in December 2014 and was completed in 2016 supported the recommendation to complete a PD&E study. The PD&E study started in January 2017 and is anticipated to last approximately two years.

SR 50 from SR 35 (US 301) to Hernando/Sumter County Line (435859-2). The purpose of this project is to widen State Road (S.R.) 50 from two to four lanes to provide increased capacity and improved safety. This project is located within Hernando County (District Seven), but the design will be managed by District Five. The project begins just east of the S.R. 35 (US 301) intersection with S.R. 50 and ends at the Hernando/Sumter County line.

SR 50 from Hernando/Sumter County Line to west of CR 757 (435859-3). The purpose of this project is to widen State Road (S.R.) 50 from two to four lanes to provide increased capacity and improved safety. The project begins at the Hernando/Sumter County line and ends just west of County Road (C.R.) 757.

SR 50 from Sumter/Lake County line to CR 33 (435859-5). This widening project will increase capacity and improve safety performance on the segment of State Road (S.R.) 50 from Sumter/Lake County line to County Road (C.R.) 33.

South Lake Trail Phase 4 from Van Fleet Trail to Villa City Road (CR 565) (435893-1). South Lake Trail, Phase IV is an 8.0-mile-long trail that begins at Van Fleet Trail (Withlacoochee State Forest, Sumter County) and ends at Villa City Road (City of Groveland, Lake County). The project includes a 14-foot paved multi-use trail, cattle crossings, pedestrian bridge at SR 50, underpass at CR 33, wetland bridge, and trailheads.

SR 93 Sumter County Northbound Rest Area (438562-2 I-75). This project includes full reconstruction of both northbound rest areas along Interstate 75 (I-75) in Sumter County, and expanded parking.

I-75 (SR 93) Sumter County Southbound Rest Area (438562-3). This project includes full reconstruction of both southbound rest areas along Interstate 75 (I-75) in Sumter County, and expanded parking.

Sumter County Projects Under Construction

(source: <https://www.sumtercounty.fl.gov/221/projects>)

County Wide Annual Pavement Management Program. Prepare plans to rehabilitate county roadways by various methods such as microsurfacing, and crack seal. Mill and resurface roadways. AKCA is under contract with Sumter County to restripe various roadways throughout the county.

C-468 Four Lane from Turnpike to South of SR 44. The rebuilding of this roadway from a two-lane to a four-lane will serve to accommodate existing and future growth and development on C-468 and in the surrounding area. The design is 100% complete and has been submitted for SWFWMD permitting.

C-469. Project scope and schedule for C-469, from C-48 to SR 50 (approximately 5.7 miles in length); Mill and resurfacing for the entire length and paved shoulder on each side of roadway. Paved shoulders will enhance the safety for both autos and truck traffic using this road. This roadway serves the Center Hill Community and connects with SR 50 at its southern terminus. This project is under design, construction will begin November 2012.

CR 529A. Project is approximately 1 mile long, road is east of the Sumter County Landfill, off of C-470. Sumter County will apply 2 inches of open grade and cap it with friction course.

C-48. Rehabilitation of C-48 from SR 471 to 1 mile west of SR 471. The method to improve that section of C-48 is to widen (non-capacity), resurface, and rehabilitate C-48 by widening the existing land width to twelve-foot travel lanes, adding two foot paved shoulders and improving the clear zone recovery areas within the existing limited right of way.

CR 542. Widen and resurface US 301 to C-475 S, for a total length of approximately 2,000 feet.

Sumter County Projects Under Study and Design (Planned, PES, PD&E, and Design)

(source: <https://www.sumtercountyfl.gov/221/Projects>)

C-468 PES. A Preliminary Engineering Study (PES) was completed for C-468, from US 301 to 600 feet east of Florida's Turnpike. The purpose of the PES was to determine the future typical section and alignment for the roadway based on future traffic volumes, environmental analysis, and right-of-way needs. The study includes transportation modeling to determine design year 2035 traffic volumes, drainage and pond sitting analysis, environmental exploration, and preparation of engineering drawings and a conceptual design roadway plan for the proposed roadway alternative. The project includes public input through community meetings and presentation to the Sumter County Board of County Commissioners. The preferred roadway alternative includes a four-lane, divided urban typical section. A transition to a suburban typical section with four lanes and a divided median will begin at CR 505. The roadway will have a closed drainage system, 4-ft paved bicycle lanes, and 5-ft sidewalks in each travel direction. The proposed typical section will increase capacity and improve traffic operations for the corridor. A formal Preliminary Engineering Study report was prepared that summarizes the engineering analysis and presents the recommended roadway alternative, and approved by the Board of County Commissioners.

C-470 PES. The Preliminary Engineering Study is now complete, with the final recommendations being accepted by the Board of County Commissioners on 2/22/2011 as part of the regular BOCC Meeting. The study was focused on the identification of long term transportation needs along C-470 within the 9.5-mile corridor from Interstate 75 to the Lake County line just west of Florida's Turnpike. The recommended improvements identified as a result of the study process involve widening the existing C-470 to four lanes between I-75 and US 301. This involves a suburban typical section in 160-ft of right-of-way and a slight realignment of the curves just east of the I-75 interchange. Along US 301 between the two offset intersections with C-470, the existing US 301 would be widened to a six-lane urban roadway within right-of-way of approximately 165-ft. Between US 301 and the Lake County Line, the existing C-470 will be widened to four lane rural roadway within 200-ft of right-of-way. Paved shoulders and/or designated bicycle lanes, sidewalks and a 15-ft

multi-use trail / pathway have also been incorporated to accommodate pedestrians and other non-motorized uses. The overall cost of the project has been estimated at \$85 Million, and involves just over 120 acres of new right-of-way, no business displacements or residential relocations, and 3.2 acres of wetland impacts. At this time, the County is looking at opportunities for phasing the future implementation of the recommended improvements, as well as trying to identify funding for a future design phase.

Preliminary Engineering Study (PES) for C-466W, from C-475 to US 301. The purpose of the PES study was to determine the future typical section and alignment for the roadway based on future traffic volumes, environmental analysis, and right-of-way needs. The study includes transportation modeling to determine design year 2035 traffic volumes, drainage and pond sitting analysis, environmental exploration, and preparation of engineering drawings and a conceptual design roadway plan for the proposed roadway alternative. The project includes solicitation of public input through community meetings and presentation to the Sumter County Board of County Commissioners. The preferred roadway alternative includes a four-lane divided roadway section from C-475 to CR 209 and a four-lane roadway section with a center two-way left turn lane from CR 209 to US 301. The roadway will have a closed drainage system and 4-ft paved bicycle lanes in each travel direction. A 5-ft sidewalk is proposed on each side of the road from CR 209 to US 301. The proposed roadway typical section will increase traffic capacity and improve traffic operations for the corridor. The PD&E study has changed to a Preliminary Engineering Study and a revised scope and fee is under review.

C-462 PES. A Preliminary Engineering Study (PES) was completed for C-462, from CR 209 to C-466A. The purpose of the PES is to determine the future typical section and alignment for the roadway based on future traffic volumes, environmental analysis, and right-of-way needs. The study includes transportation modeling to determine design year 2035 traffic volumes, drainage and pond sitting analysis, environmental exploration, and preparation of engineering drawings and a conceptual design roadway plan for the proposed roadway alternative. The project includes solicitation of public input through community meetings and presentation to the Sumter County Board of County Commissioners. The preferred roadway alternative includes a two-lane roadway section with left turn lanes from CR 209 to US 301 and a two-lane roadway section with a center two-way left turn lane from US 301 to C-466A. The roadway will have a closed drainage system, 4-ft paved bicycle lanes, and 5-ft sidewalks in each travel direction. The proposed typical section will increase capacity and improve traffic operations for the corridor. The proposed roadway alignment will correct the existing mis-alignment of C-462 east and west of US 301, and improve traffic operations for US 301 in this

area. A formal Preliminary Engineering Study report was prepared that summarizes the engineering analysis and presented, recommended roadway alternative and subsequently approved by the Board of County Commissioners.

C-468 Four Lane from Turnpike To South of SR 44. The rebuilding of this roadway from a two-lane to a four-lane will serve to accommodate existing and future growth and development on C-468 and in the surrounding area. The design is 100% complete and has been submitted for SWFWMD permitting.

C-468 Turnpike Interchange. This project is located where C-468 intersects with The Florida Turnpike. The project involves the preliminary and final design, right of way acquisition and road construction of a partial interchange at C-468 and The Florida Turnpike, including grading, stabilized base, lime rock base, curb and gutter, median gutter and asphalt pavement, drainage, traffic maintenance, erosion control, construction staking, materials testing, clearing and grubbing, signage, pavement markings, traffic signals, utility relocation, drainage works including installation of stormwater pipe, drainage inlets, manholes and pond construction. The new interchange will be a half interchange and allow northbound traffic to exit, and others to enter and head south on the turnpike,

C-466A Phase III. C-466A is currently a two-lane undivided roadway without turn lanes from US 301 east to the intersection at Powell Road. The existing roadway has a closed drainage system with sidewalks, but no bicycle lanes. The roadway is located in the City of Wildwood Community Redevelopment Area (CRA). The design project involves improving the roadway to have a center left turn lane from US 301 to Pleasantdale Drive and to be a four-lane divided roadway section east of Pleasantdale Drive to match the current roadway section east of Powell Road. The project will also include upgrading the existing 5-ft sidewalks to 8-ft sidewalks and adding 4-foot paved bicycle lanes, which are required by the City of Wildwood within their CRA. The project includes determination of a proposed roadway alignment to have minimal impacts on adjacent property owners and existing mature trees. Other aspects of the design project include a tree canopy survey, route survey, geotechnical exploration, environmental study, traffic analysis, right-of-way determination, drainage design, signal modification plans, utility coordination, public involvement, preparation of roadway design plans and calculations, and bid documents.

C-462. Sumter County will be making roadway improvements to C-462, from US 301 to C-466A and is currently under contract with Kimley-Horn and Associates to develop construction plans. The proposed design includes a three-lane roadway with a center left turn lane, bicycle lanes, curb and gutter, and sidewalks. The survey and geotechnical investigations have begun, and you may see some crews performing work along the corridor. The construction plans will be complete January 2013 and construction is planned for 2013-14.

C-466, CR 209 to US 301. Sumter County will be making roadway improvements to C-466 from CR 209 to US 301 and is currently under contract with Kimley-Horn and Associates to develop construction plans. The proposed design includes a three-lane roadway with a center turn lane, bicycle lanes, curb and gutter, and sidewalks.

C-475. This project will consist of milling and resurfacing from C-470 to north of City of Bushnell near the Jumper Creek Bridge. It will also include paved shoulders and replacement of the existing bridge at Jumper Creek. This is being planned for design and construction in FY15.