



Economic Assessment of the River of Lakes Heritage Corridor

Final Report

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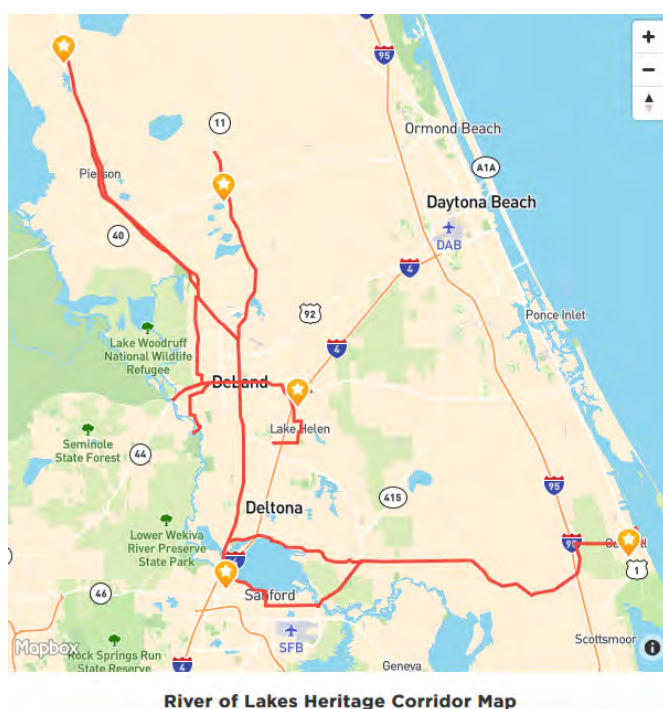
Finally, we thank the nearly 800 users and visitors of the ROLHC who responded to the field interviews and online survey to share their personal information and opinions regarding scenic highways.

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, legislation was passed to enable the State of Florida, 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 to their local communities. In the state of Florida, the first study ever completed to document economic impact was conducted in 2018 (Phase I). That study, the *Economic Assessment of the Scenic Sumter Heritage Byway* (Hodges and Court, 2019) was commissioned by the FDOT District Five. More recently, a study by Concas, Menon, and Asamoah (2020) designed two data collection instruments to assist the Florida Scenic Highway Program (FSHP) in evaluating and quantifying the contribution of scenic highways to Florida's economy and quality of life of Floridians. The study utilized findings from the *Economic Assessment of the Scenic Sumter Heritage Byway*, in part, to estimate the contribution of scenic byways to economic development.

This study (Phase II) was commissioned by the FDOT District Five to assess the economic impacts of the *River of Lakes Heritage Corridor Scenic Highway (ROLHC)* located in Volusia and Seminole Counties. DeLand and Sanford are the principle cities located along the byway. The scenic and historic St. Johns River runs through the byway. This 156-mile byway is less than an hour from Orlando to the west and beach side communities to the east. This byway was chosen for Phase II of this investigation because of the extensive community support and local interest in the cultural, scenic, and recreational resources available throughout the corridor, in addition to the relationships the byway organization has with the local elected officials and volunteer community.



The ROLHC embodies a unique blend of sophisticated contemporary culture, rich historic resources, and gorgeous natural Florida scenery, connecting travelers to the numerous heritage and cultural sites in this historic region. Attractions along the ROLHC include Blue Spring State Park, De Leon Springs State Park, Hontoon Island State Park, the Central Florida Zoo and Botanical Gardens, Barberville Pioneer Settlement, DeBary Hall, Historic Downtown Sanford & DeLand, the Enterprise Heritage Center & Museum, and the Old Spanish Sugar Mill.

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 ROLHC byway organization is a community-based group formed to promote awareness and appreciation of the River of Lakes Heritage Corridor and to preserve, promote, and protect the corridor as a regional resource. Participation in this organization is open to all members of the public, including local residents, educators, students, local governments, and members of the community at large who are interested in protecting and improving the ROLHC, its surrounding lands, communities, natural resources, parks and open spaces.

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. 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.

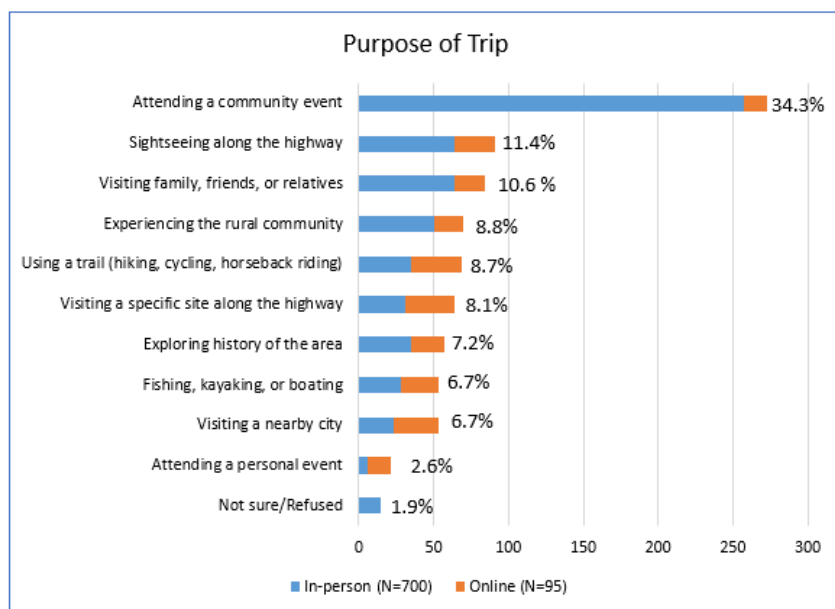
Having said that, introduced in early 2020, the INVEST in America Act (*Investing in a New Vision for the Environment and Surface Transportation in America Act*) is a surface transportation and infrastructure bill that includes funding for the National Scenic Byways Program for the first time in eight years. The bill was approved by the House Transportation and Infrastructure Committee and then the full House of Representatives in July 2020. Now called H.R. 2, the Moving Forward Act has moved to the Senate where a companion bill is being considered. It is hoped that a conference committee will finalize a bill, providing future National Scenic Byways (SB) funding for approval by the President late in 2021. If approved, this Authorization could serve as a future funding source for designated scenic byways across the country.

To help assess the current economic impacts of the ROLHC designation in Volusia/Seminole Counties, a combination of methods involving public surveys, traffic count analysis and regional economic modeling

were utilized by the University of Florida research team.

Between September 2019 and May 2020, personal interviews, a focus group, an online survey, and field surveys conducted at 10 byway locations, were completed with 795 respondents (700 in-person surveys, 95 online surveys) and more than a dozen local stakeholders.

Results of the survey indicate that 25% of respondents overall (19% of in-person interviews) were aware of the Scenic Byway and 46% (44% of



- Note: Responses do not total to 100%, as respondents could provide more than one reply.
- In addition, 244 total provided responses (30.7%) were something “Other” than those provided in the fixed responses above.

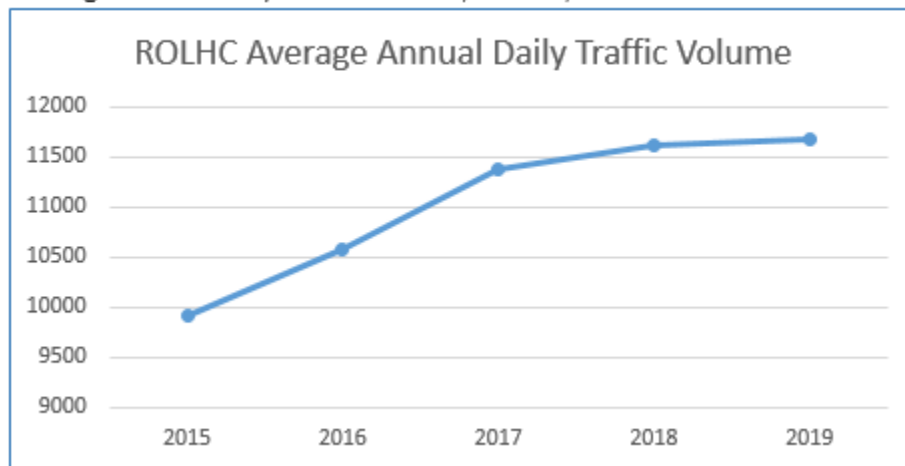
in-person surveys) learned about the Byway from “word of mouth.” Respondents reported engagement in a variety of activities, including sightseeing, bicycle riding, exploring rural and historic areas, and hiking and horseback riding along adjacent trails. About 18% of non-resident respondents said they traveled on the byway for sightseeing or exploring rural or historic sites (they could choose more than one purpose), which are activities explicitly associated with the byway purpose. Respondents visited the area an average of 15.6 times per year, stayed 6 days per trip, and spent an average of \$120 to \$124 per group-day per visit along the byway.

About 96% of respondents were either very or moderately satisfied with the attractiveness of the area, and nearly 84% of respondents indicated that they would be very likely to visit the area again.

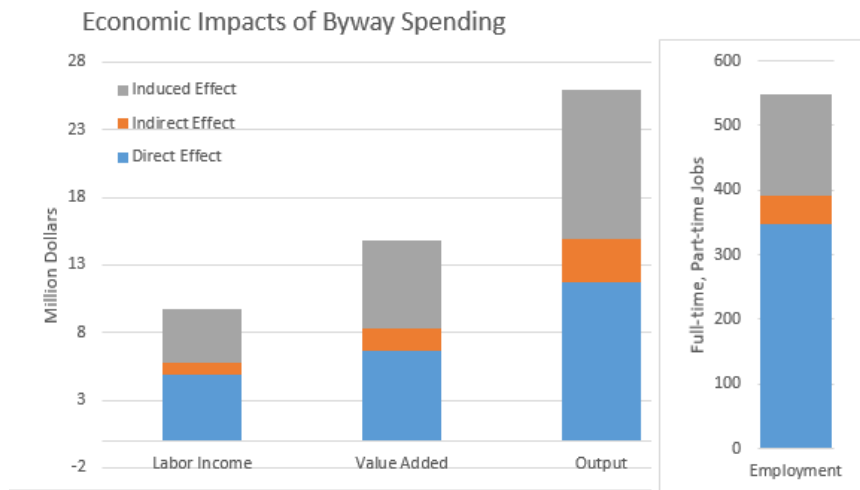
Comments made by respondents confirmed a preference for the quiet, friendly, and historic character of the area, scenic beauty, warm winter weather, and the opportunity to experience natural, less developed areas of Florida. Opportunities to interact with nature were clearly valued by many respondents.

A traffic count analysis evaluated traffic volumes on highway segments comprising the ROLHC. The analysis indicated an increase of 17.7% in average traffic volumes across 57 monitoring locations since 2015. While much of this increase can be attributed to the County’s overall growth

Average annual daily traffic volume, ROLHC, 2015-19



it can be assumed that a portion is attributable to the byway. The 2019 average daily traffic volume (11,675) was multiplied against the average spending per day by nonresident parties (\$123.91), the share of survey respondents who were nonlocal resident visitors from outside Volusia County (47.5%), the share who reported sightseeing or exploring history as their primary trip purpose (17.7%), and the share who were aware of the byway (19.4%) to calculate total annual spending of \$18.17 million as an estimate of final demand attributable to the byway and its partners.



A regional economic model was created for Volusia County¹ for economic impact analysis with the *IMPLAN* (*Impact Analysis for Planning*) economic impact and social accounting software, and associated county dataset for 2017, to analyze applicable visitor spending across all industry sectors. The total annual economic impacts attributed to the ROLHC were estimated at 548 full-time and

part-time jobs, \$9.7 million in labor income, \$14.8 million in value added or Gross Regional Product of the county, and \$26.0 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 \$1.72 million, and federal government tax revenues were \$2.19 million, 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, including volunteer organizations like the River of Lakes Heritage Corridor, which primarily encourage awareness and appreciation of the byway as a regional resource. 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 social impact of the FSHP is composed of several elements, some of which are measured approximately, while others require the collection of targeted data to generate a more precise value.

The SROI to Volusia County for the ROLHC was calculated using the value-added impact of visitor spending as the “benefit,” and the cumulative expenses to maintain the designation along with the imputed value of byway volunteer time as the “investment.” Based on this calculation, the social return on investment to the ROLHC is very attractive from a public policy standpoint: the net economic benefits of the scenic byway over 10 years were nearly 25 times the cumulative investment; this clearly justifies continued support and investment by federal, state, and local stakeholders.

Although this report does not measure the ROI of transportation projects and their impacts to the community, it is important to note that FDOT, Volusia and Seminole Counties have an abundance of transportation and trail projects planned and underway along the ROLHC corridor. These investments are testaments that the area is growing and is attractive to visitors and residents.

In conclusion, the study results indicate that there is considerable awareness of the ROLHC, that it attracts many visitors to the area who are very satisfied with their experience and likely to visit again,

¹ As the vast majority of the ROLHC is within Volusia County, excepting a few miles in Seminole County, the *IMPLAN* model is for Volusia County. For economic analysis results including both Volusia and Seminole counties, please see Appendix E.

and whose spending contributes significantly to the local economy. Thus, the ROLHC has been successful in its mission to promote tourism, showcase the outstanding natural beauty, recreational and historical resources of the region, and create a unique sense of place that helps bolster the local economy. These qualities provide an enormous value-added contribution to the visitor experience along the scenic byway and surrounding communities.

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 one or more of six “intrinsic qualities”: 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 byway 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 NSB program is under the auspices of the Federal Highway Administration.

Presently, there are 150 National Scenic Byways, including 42 All-American Roads, located in 46 states that have state scenic byway programs (U.S. Federal Highway Administration, 2020). 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; four of which are located in FDOT District Five.

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, recreational, 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 currently has eight of these byways encompassing over half of the scenic highway mileage in the state (Figure 1.2), and a ninth byway, the Halifax Heritage Byway, will soon have a state designation.

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.



River of Lakes Heritage Corridor



Community Ribbon-Cutting Ceremony

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 (Florida Scenic Byways Program Guidance Manual, 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 interests to create a rewarding experience and generate 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.



Visitors on a River Cruise

Figure 1.3. Scenic highway visitor experience model



Source: Florida Scenic Highways Program Guidance Manual, 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. While the INVEST in America Act currently working its way through the federal legislative process could provide future funding opportunities, there is an immediate need for financial support for byway projects. In attempting to fund these needs, many times byway organizations are pressed to document the return on investment that their organization provides to the

community as part of their request. Because of the types of activities performed by byway organizations, they struggle to provide economic data necessary 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 (Phase II) of a selected scenic highway in the Central Florida region was commissioned following the completion of the 2018 *Economic Assessment of the Scenic Sumter Heritage Byway* (Phase I) in Sumter County, Florida, to further assess the return on investment of designated scenic byways, to help document the visitor experience, and to provide added research in developing data that can support byway efforts.



Hontoon Island State Park, on the River of Lakes Heritage Corridor

The byway selected for Phase II is the *River of Lakes Heritage Corridor Scenic Highway (ROLHC)* located in Volusia and Seminole Counties, including DeLand and Sanford. The ROLHC is named for the St. Johns River which runs through it and is the central natural resource feature in the region. This byway is less than an hour from Orlando to the west, and coastal communities to the east. This corridor was originally designated as a Scenic Byway in March 2009 and includes two extensions that were more recently added, resulting in today's 156-mile byway (Figure 1.4).



Kayaking on Blue Spring, on the River of Lakes Heritage Corridor

This byway was chosen for Phase II of this investigation because of the extensive community support and local interest in the cultural, scenic, and recreational resources available throughout the corridor, in addition to the relationships the byway organization has with the local elected officials and volunteer community. It is anticipated that the results from this and the previous (Phase I) study could be helpful information to byways statewide when required to document return on

investment of a designated scenic byway.

Figure 1.4. Map of the River of Lakes Heritage Corridor Scenic Highway



Source: [ROLHC](#)

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 13 current construction projects in



River of Lakes Heritage Corridor: Hiking/Biking Trail

various phases of development in Volusia and Seminole Counties, and an additional 14 future projects slated for construction in the counties; the various projects are summarized in Appendix H. These infrastructure investments, totaling more than one billion dollars, are a testament that the area is growing and is attractive to visitors and residents. These improvements enhance the visitor experience along the ROLHC.

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 that 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.

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 (HDR Decision Economics, 2012a), the Woodward Avenue All-American Road (HDR Decision Economics, 2012b), the Volcanic Legacy Scenic Byway (HDR Decision Economics, 2012c), the Journey through Hallowed Ground National Scenic Byway (HDR Decision Economics, 2012d), and the Cherokee Hills National Scenic Byway (HDR Decision Economics, 2012e). 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.

Phase I of this study found that the Scenic Sumter Heritage Byway organization in Sumter County 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 (Hodges and Court, 2019). 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. 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 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. A regional economic model showed the total annual economic impacts attributed to the ROLHC 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. This success is attributable, in great part, to the dedicated efforts of community-minded volunteers. In fact, the Social Return on Investment (SROI) to Sumter County for the Scenic Byway, 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, showed a net annual benefit to investment (3.5:1) that indicated a very attractive return when compared to many other public projects.

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
Woodward Avenue All-American Road (2012)			
Employment (Jobs)	1	1	2
Earnings (\$1000)	\$27	\$27	\$54
Visitor Spending (\$1000)	-	-	-
Capital Investments to Date (\$1000)	\$111	\$123	\$234

Source: HDR Decision Economics, 2012a—2012e

A recent study by Concas, Menon, and Asamoah (2020) designed two data collection instruments to assist the Florida Scenic Highway Program (FSHP) in evaluating and quantifying the contribution of scenic highways to Florida's economy and quality of life of Floridians. The study also utilized findings from the *Economic Assessment of the Scenic Sumter Heritage Byway* presented above, in part, to

estimate the contribution of scenic byways to economic development across the entire state. They conclude that direct visitor expenditure impacts on all Florida byways contribute about \$64 million in state Gross Domestic Product annually, and scenic byway-related visitor expenditures help support about 1,070 jobs in the State each year (Concas, Menon, and Asamoah, 2020).

2. Methods

This research effort was undertaken as an assessment of the economic and social impacts of the River of Lakes Heritage Corridor 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 modeling, and SROI 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 from the ROLHC region in August 2019, including elected officials and local government representatives, scenic byway working committee members, and business owners. A focus group was also conducted with nine local leaders via the Zoom video conference system on May 6, 2020. The interviews and focus group were intended to document current economic trends, goals, and future projections for the ROLHC 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. In total, four stakeholders were interviewed and nine participants representing the community took part in the focus group.

Questions asked in the stakeholder interviews were as follows:

1. How would you describe the Florida Scenic Highway Program and what it does in the state?
2. What role does your organization play, if any, in the *River of Lakes Heritage Corridor Scenic Highway* byway organization?
 - a. Prompt if needed: Grass roots participation; through the Florida DOT
3. What are some ways that the *River of Lakes Heritage Corridor Scenic Highway* affects your particular community?
 - a. Prompt if needed: What about visitors to the area? Tourism?
4. How would you describe a **typical tourist** visiting the region?
 - a. Prompt if needed: Where do most tourists come from (out of state / out of town / etc.)? Age? Interests?
5. And, how would you describe a **typical Byway visitor**?
 - a. Prompt if needed: Where do most visitors come from (out of state / out of town / etc.)? Age? Interests?
6. How do most folks in your area find out about the Byway?
 - a. Prompt if needed: Road signs, social media, kiosks, maps/brochures, word of mouth?
 - b. Is this different for visitors/tourists and local residents? If yes, how so?
7. How much of an economic impact does the *River of Lakes Heritage Corridor Scenic Highway* have on your community?
 - a. Prompt for: Does the ROLHC help to improve the local economy? Do most ROLHC visitors stay overnight? Attend events (if so, which)? Visit regularly?
 - b. Prompt for: What kinds of comments have you heard from visitors about the ROLHC?

8. What could be done by the ROLHC byway organization to help strengthen the local economy? Are improvements or promotions needed to increase awareness or visitation?
9. Are there any other recent visitor impact studies for your community that we should be aware of as we proceed?
10. Would you please suggest some events, attractions, and locations along the ROLHC that would provide a good opportunity to conduct these interviews in your community?
 - a. For Events: When does that occur?
 - b. For Attractions & Locations: When is that open for visitors? When are folks most likely to visit?
11. Finally, do you have any additional comments regarding the *River of Lakes Heritage Corridor Scenic Highway* or suggestions to guide us as we implement this research?

Questions asked in the focus group were as follows:

- What is your personal role in, or relationship to, the *River of Lakes Heritage Corridor Byway*?
- What is your favorite resource, experience, or attraction/event on the Byway?
- How does the Byway affect your particular community or business?
 - ✓ Probe for: Impacts from visitors, commerce/business, events, etc.

Follow-up:

- ✓ How would you (or do you) measure that impact?
- How would you describe the typical *River of Lakes Heritage Corridor Byway* visitor who stops by your business or community?
 - ✓ Probe for: Where are they from? (nearby, elsewhere in Florida, out of town/state/country, etc.)
 - ✓ Probe for: Demographics (age, income, education, group types/interests)
- How do visitors to the area find out about the Byway?
 - ✓ Probe for: (Visit Florida) Welcome Centers
 - ✓ Probe for: Road signs; social media; web sites (which?); interpretive kiosks; maps; pamphlets or brochures (especially in hotels); word of mouth; etc.
- How do Byway visitors typically experience the Byway? How do they interact with the Byway?
 - ✓ Probe for: Routes followed; Mode of travel (car, motorcycle, bicycle, trail hiking, etc.); Number of sites visited; Events attended; etc.

Follow-up:

- ✓ Do most folks tend to visit at a certain time of year? How long do they usually stay? Do they make repeat visits?
- ✓ Do you think local area residents experience the Byway in the same ways that out of town visitors do, or are there differences?

- ✓ Probe for: Routes followed; Mode of travel (car, motorcycle, bicycle, trail hiking, etc.); Number of sites visited; Events attended; etc.

Follow-up:

- ✓ Has the presence of the Byway shaped residents' view of the area as a "tourism" destination? [If yes: How so?]
 - ✓ What words do people use when talking about Byway experiences?
 - ✓ In what ways have you seen or heard visitors sharing their experiences with others?
 - ✓ Probe for: Social media
- What physical improvements or promotions are needed to increase awareness and use of the Byway?
- ✓ Probe for: Any differences for out of town visitors and local residents?
- Does anyone have any final thoughts about River of Lakes Heritage Corridor that you feel are important to share with us?

2.2 Survey Questionnaire Development

The survey questionnaire and interview protocol for face-to-face and internet surveys were developed based on information received from local stakeholders, FDOT FSHP District Five 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 the ROLHC region. With the assistance of ROLHC Working Committee, the UF FSRC team identified 12 events, attractions, destinations, and points of interest on the River of Lakes Heritage Corridor, focused on locations along the Corridor between SR40 and Sanford (with one interview location to be in vicinity of Oak Hill), for conducting in-person surveys. The interview survey sampling events and locations are shown in Table 2.1.

Although initially targeted, surveys were not conducted at the Fall County Jamboree in Barberville, due to event logistics (the survey team was denied entrance, despite prior approval). Also, event cancellations in March and April 2020, due to the COVID-19 pandemic halted in-person surveying early.

Table 2.1. Personal interview survey sampling events and locations

Location	Event	Date(s)	Completed Surveys
DeLand	Event: Craft Fair	September 28-29, 2019	39*
Barberville	Event: Fall Country Jamboree	November 2-3, 2019	0**
DeLand	Event: Fall Festival of the Arts	November 23-24, 2019	91
DeLand/St. Johns	Event: Boat Parade	December 14, 2019	25
Orange City	Event: Blue Springs Manatee Festival	January 25-26, 2020	102
Enterprise	Event: Hot Dogs & Hot Rods	February 29, 2020	40
DeLand	Event: Mardi Gras Parade	February 22, 2020	61
DeLand	Event: Bike Rally	March 7, 2020	38
DeLand	Event: Outdoor Arts Festival	March 28-29, 2020	Canceled (COVID)
Pierson	Event: Spring Frolic (Barberville Pioneer Settlement)	April 4-5, 2020	Canceled (COVID)
De Leon Springs	Point of Interest: De Leon Springs State Park	Multiple visits across survey time frame	143
DeLand	Point of Interest: Hontoon Island State Park	Multiple visits across survey time frame	101
Sanford	Point of Interest: Central Florida Zoo & Botanical Gardens	Multiple visits across survey time frame	60

*Rain on second day; **Survey team denied access

A total of 700 personal interviews were completed from September 2019 until March 2020. 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 the Florida Survey Research Center.

For the internet (email) survey, lists of email addresses were compiled for members of organizations in the Central Florida region that frequently use scenic byways, such as motorcycle groups, antique car clubs, and bicyclists. Stakeholders associated with the ROLHC identified a number of organizations, clubs, and associations located in the area surrounding the ROLHC. Each organization was sent an email explaining the research, a link to the online survey, and an access code. The list of organizations that were sent the link to the survey is as follows:

- Florida Bicycle Association
- ROLHC Scenic Byway/Enterprise Museum
- West Volusia Tourism & Advertising Authority
- Miata MX-5 Car Club of the Villages
- Jaguar Club of North Florida
- All British Car Club of Volusia County
- Main-Street DeLand
- Volusia County Corvette Association
- JCs Bike Shop - DeLand

2.4 Traffic Count Analysis

To evaluate motorist usage of highway segments comprising ROLHC 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 57 monitoring stations in 2019 are summarized in Table 2.2 and Figure 2.1. The number of vehicles counted at individual locations monitored in 2019 ranged from 800 to 54,500, and for all 57 highway segments the average was 11,675. The overall average was calculated using the highway segment length as a weighting factor to avoid overestimating from short segments in urban areas with high traffic volumes. This number was considered 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 17.7% over the period 2015-19, from 9,923 in 2015 (10,584 in 2016; 11,380 in 2017; and 11,618 in 2018) to 11,675 in 2019. This increase in traffic is attributed to overall population growth and development, as well as promotion of the byway, and is used in the benefit calculation later in this report [see: Economic Analysis]. Note additionally that during the 2015-18 period, the resident population in Volusia County increased by 5.7%, from 517,887 to 547,538 persons (US Census).

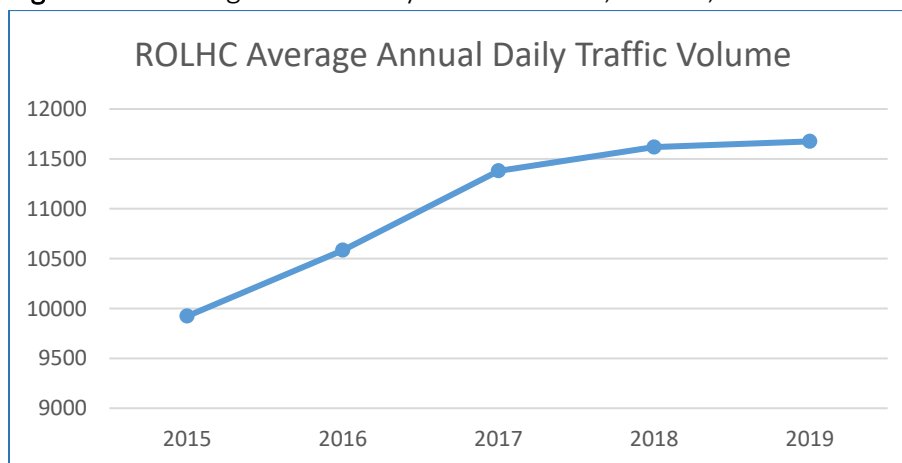
Table 2.2: Average annual daily traffic volume at locations on the River of Lakes Heritage Corridor, 2015-19

Road Name	From	To	Length (m)	Average Annual Daily Bi-Directional Traffic Volume 2019
US-17/92	W EDGE OF BR 790196	END BDG #770070	746	33,000
US-17/92	SEMINOLE BLVD	SR-400 WB	5,323	14,600
FRENCH AVE	CR-415/13TH ST	N/A	1,236	23,500
CELERY AVE	US17/US92/FRENCH AVE	BRISSON AVE	3,331	8,500
FRENCH AVE	N/A	SEMINOLE BLVD	414	13,900
CELERY AVE	BRISSON AVE	N/A	2,760	3,900
SR-11	GLENWOOD RD	N SPRING GARDEN AVE	1,909	4,900
C R BEALL BLVD	N/A	E Highbanks Rd	1,759	25,500
C R BEALL BLVD	E Highbanks Rd	DEBARY PLANT BLVD	1,673	25,000
E NEW YORK AVE	S BLUE LAKE AVE	N/A	3,062	17,300
SR-415	SEMINOLE CO LINE	CR-4162/DOYLE RD	3,239	24,000
US-17	E WASHINGTON AVE	CR-305/BUNNELL RD	6,076	6,100
N WOODLAND BLVD	E PLYMOUTH AVE	US-92/SR-600	1,330	23,000
US-17	MERCERS FERNERY RD	GLENWOOD RD	833	26,000
E NEW YORK AVE	S HILL AVE	S BLUE LAKE AVE	1,035	12,300
C R BEALL BLVD	BARWICK RD	CR-4162/DIRKSEN DR	1,714	30,000
US-17	CR4030/SPG GDN RANCH	SR-40	8,823	9,600
US-17	GLENWOOD RD	CR-15A	2,609	15,000
SR-44	SR-44 BEFORE DITCH	CR-4139/N SUMMIT AVE	466	19,800
W NEW YORK AVE	CR-4110/OLD NEW YORK	SR-15A/S SPG GDN AVE	1,152	14,100
SR-44	N/A	CR-4110/OLD NEW YORK	1,089	12,600
S VOLUSIA AVE	ENTERPRISE RD	E BLUE SPRINGS AVE	2,048	32,000
S WOODLAND BLVD	E WISCONSIN AVE	N/A	1,453	30,000
W NEW YORK AVE	SR-15A/S SPG GDN AVE	S STONE ST	800	10,500
US-17	SR-40	E WASHINGTON AVE	8,088	7,600
SPRING GARDEN AVE	CR92/INTL SPDWY BLVD	GLENWOOD RD	1,928	17,600
SPRING GARDEN AVE	GLENWOOD RD	US-17/SR-15	1,801	12,600
US-17	CR-15A	N/A	4,285	18,300
C R BEALL BLVD	CR-4162/DIRKSEN DR	N/A	1,111	24,500
C R BEALL BLVD	DEBARY PLANT BLVD	SAXON BLVD	784	31,500
US-17	N/A	CR4030/SPG GDN RANCH	1,939	11,600
SR-11	N SPRING GARDEN AVE	FLAGLER CO LINE	19,187	3,900
SPRING GARDEN AVE	W PLYMOUTH AVE	CR92/INTL SPDWY BLVD	1,322	25,000
SR-44	CR-4139/N SUMMIT AVE	79110057 WB ON	1,055	22,000
S VOLUSIA AVE	SAXON BLVD	ENTERPRISE RD	1,288	24,000
US-17	US-92/SR-600	MERCERS FERNERY RD	1,095	33,000
S WOODLAND BLVD	N/A	E TAYLOR RD	2,965	54,500
S WOODLAND BLVD	E TAYLOR RD	E BERESFORD AVE	1,648	32,000
SR 44	S SHELL RD	SR-44	1,984	12,300
N WOODLAND BLVD	E EUCLID AVE	E WISCONSIN AVE	1,035	13,200
N WOODLAND BLVD	E WISCONSIN AVE	E PLYMOUTH AVE	1,231	19,300
W NEW YORK AVE	S STONE ST	CLARA AVE	888	11,200
NEW YORK AVE	CLARA AVE	S AMELIA AVE	729	7,700
N VOLUSIA AVE	E BLUE SPRINGS AVE	CR-4145/E GRAVES AVE	778	32,000

Road Name	From	To	Length (m)	Average Annual Daily Bi-Directional Traffic Volume 2019
S WOODLAND BLVD	E BERESFORD AVE	E EUCLID AVE	953	19,400
DOYLE RD	SAXON BLVD	COURTLAND BLVD	4,032	9,300
S BERESFORD RD	W BERESFORD RD	W EUCLID AVE	1,950	3,000
DOYLE RD	PROVIDENCE BLVD	SAXON BLVD	2,930	10,500
DOYLE RD	COURTLAND BLVD	SR-415	2,465	7,800
FLORIDA AVE	N/A	N/A	7,300	720
MAYTOWN RD	N/A	US-1/SR-5		
PLYMOUTH AVE	SR-15A/SPRING GDN	N HILL AVE	4,254	9,400
N BLUE LAKE AVE	SR 44/E NEW YORK AV	HILL AVE	1,984	4,800
GRAND AVE	SR-44	US-17/SR-15	10,596	2,300
DIRKSEN DR	S SHELL RD	N/A	4,821	8,900
DEBARY AVE	LAKEFRONT CT	JACOB BROCK AVE	2,313	29,000
CR 3	SR-40	US-17/SR-15	11,965	800
Length-weighted average for all highway segments				11,675
Percent of 2019 levels				100%

Source: Florida Department of Transportation (<https://tdaappsprod.dot.state.fl.us/fto/>) and investigator calculations.

Figure 2.1. Average annual daily traffic volume, ROLHC, 2015-19



2.5 Regional Economic Analysis

To evaluate the economic impacts of byway user spending, a regional economic model was developed for Volusia County, Florida² using the *Impact Analysis for Planning (IMPLAN)* input-output and social accounting software and associated state and county datasets for 2017 (IMPLAN Group, LLC, 2017). 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,

² The *IMPLAN* model was for Volusia County, Florida, since most of the ROLHC is within the county, excepting a few miles in Seminole County. A model, including both Volusia and Seminole Counties, is included in Appendix E.

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 ROLHC can be put in context by comparison to the overall economic activity in Volusia County, Florida. A profile of the county economy in 2017 is provided in Table 2.4. Total employment was 243,180 full-time and part-time jobs, labor income totaled \$9,670 million, Gross Regional Product was \$16,043 million and total industry output or revenues was \$30,006 million. The largest industry groups in the county in terms of employment were health and social services (32,964 jobs, 13.5%), retail trade (30,310 jobs, 12.5%), accommodation and food services (24,823 jobs, 10.2%), and government (18,853 jobs, 7.7%). The largest industries in terms of Gross Regional Product were real estate and rentals (17.6%), health and social services (12.6%), government (9.3%), retail trade (8.9%) and manufacturing (7.7%).

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

Description	Employment (Jobs)	Labor Income (M\$)	Gross Regional Product (M\$)	Industry Output
11 Agriculture, Forestry, Fishing & Hunting	3,356	\$39.8	\$89.8	\$141.3
21 Mining	2,695	\$0.5	\$3.2	\$234.1
22 Utilities	452	\$50.3	\$168.1	\$397.8
23 Construction	16,002	\$661.0	\$1,037.2	\$2,410.0
31-33 Manufacturing	11,278	\$734.7	\$1,242.2	\$3,824.5
42 Wholesale Trade	6,176	\$388.3	\$789.3	\$1,261.3
44-45 Retail trade	30,310	\$879.0	\$1,432.4	\$2,470.5
48-49 Transportation & Warehousing	4,718	\$167.0	\$216.1	\$472.0
51 Information	2,551	\$119.5	\$297.6	\$951.1
52 Finance & insurance	9,233	\$340.7	\$523.3	\$1,612.8
53 Real estate & rental	13,691	\$250.3	\$2,826.1	\$4,485.1
54 Professional- scientific & tech services	14,878	\$726.0	\$924.8	\$1,782.3
55 Management of companies	1,441	\$146.0	\$171.9	\$314.4
56 Administrative & waste services	17,674	\$570.1	\$658.6	\$1,111.3
61 Educational services	7,203	\$280.8	\$294.2	\$481.0
62 Health & social services	32,964	\$1,802.9	\$2,021.7	\$3,446.8
71 Arts- entertainment & recreation	6,096	\$111.2	\$196.2	\$374.8
72 Accommodation & food services	24,823	\$565.5	\$880.2	\$1,573.8
81 Other services	18,788	\$600.5	\$782.1	\$1,145.0
92 Government	18,853	\$1,235.5	\$1,487.7	\$1,516.9
Total	243,180	\$9,669.7	\$16,043.0	\$30,006.5

Source: IMPLAN model for Volusia County, FL, 2017 (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



Bartram Trail Signage Dedication

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 ROLHC 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 795 completed survey responses were received, including 700 (88%) from personal interviews and 95 (12%) from the online survey (Table 3.1). Results from each survey are presented below.

Table 3.1. Summary of survey responses

Survey mode	Number of Respondents	Percent of Responses
Interview	700	88.1%
Online	95	11.9%
Total	795	100.0%

The number of completed interviews at each onsite location is shown in Table 3.2. A high of 143 interviews were completed at the De Leon Springs State Park, and 9 of 10 locations had at least 30 interviews.

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

Interview Location or Event (City)	Number of Respondents	% of Responses	Number of Refusals	Compliance Rate
Event: Craft Fair (DeLand)	39	5.6%	40	49.4%
Event: Fall Festival of the Arts (DeLand)	91	13.0%	48	65.5%
Event: Boat Parade (DeLand/St.Johns)	25	3.6%	15	62.5%
Event: Blue Springs Manatee Festival (Orange City)	102	14.6%	17	85.7%
Event: Hot Dogs & Hot Rods (Enterprise)	40	5.7%	15	72.7%
Event: Mardi Gras Parade (DeLand)	61	8.7%	7	89.7%
Event: Bike Rally (DeLand)	38	5.4%	41	48.1%
Point of Interest: De Leon Springs State Park (De Leon)	143	20.4%	57	71.5%
Point of Interest: Hontoon Island State Park (DeLand)	101	14.4%	20	83.5%
Point of Interest: Central Florida Zoo & Botanical Gardens (Sanford)	60	8.6%	54	52.6%
Total	700	100.0%	304	69.7%

A total of 304 persons who were approached and requested to do the survey interview declined to participate, representing an overall compliance rate of 69.7% (700 completed out of 1,004 attempted). Across survey sites, compliance rates ranged from 48% to 90%, higher than the average for most studies with published results, which typically report response rates as low as 25% and usually no greater than 50% (Evans, Ellis, Santiago, & Reed, 2007).

3.2 Awareness of ROLHC

Respondents were asked if they were “aware of the *River of Lakes Heritage Corridor*.” While just one in five (19.4%) in-person interview respondents were aware of the ROLHC, about two in three (67.4%) online respondents indicated that they are aware of the River of Lakes Heritage Corridor. Overall, across both surveys, about one in four (25.2%) survey respondents said they were “aware” of the ROLHC.

Table 3.3. Awareness of the ROLHC by survey respondents

Aware of ROLHC Byway	Interview	Online	Total	% of All Respondents
Yes	136	64	200	25.2%
No	555	20	575	72.3%
Not sure	9	11	20	2.5%
Total	700	95	795	100.0%

Next, those respondents who were aware of the ROLHC (n=200) were asked how they found out about the ROLHC. The largest number of respondents who reported the source of information for learning about the byway learned through word of mouth (46.5%), followed by byway maps (15.5%), as shown in Table 3.4. Scenic highway road signs were also an important means of learning about the scenic byway, reported by 37.9% of online respondents who were aware of the ROLHC (this item was not asked about in the interview surveys).

Table 3.4. How survey respondents learned about the ROLHC

Response	Frequency	% of Those Responding to the Question
Word of mouth	93	46.5%
Byway map	31	15.5%
Social media	10	5.0%
Internet/website	10	5.0%
Media story	8	4.0%
Advertisement	6	3.0%
Not sure/Refused	57	28.5%
Other	19	9.5%

*Total % may total more than 100% as respondents may choose more than one response

3.3 Trip Purpose, Types of Activities, Places Visited

The most common purpose of trips made to the ROLHC region by respondents who reported their purpose was attending a community event (34.3%), followed by sightseeing (11.4%), or visiting family or friends (10.6%), as shown in Table 3.5. The trip purposes of “sightseeing,” “experiencing the rural community of the area,” and “exploring history” were assumed to be specifically related to use of the

scenic highway, and a total of 17.7% of respondents identified any of these three purposes jointly as primary motivations (respondents were allowed to select more than one purpose).

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

Response	Frequency	%
Attending a community event	273	34.3%
Sightseeing along the highway	91	11.4%
Visiting family, friends, or relatives	84	10.6%
Experiencing the rural community of the area	70	8.8%
Using a trail (hiking, cycling, horseback riding)	69	8.7%
Visiting a specific site along the highway	64	8.1%
Exploring history of the area	57	7.2%
Fishing, kayaking, or boating	53	6.7%
Visiting a nearby city	53	6.7%
Attending a personal event	21	2.6%
Not sure/Refused	15	1.9%
Other	244	30.7%

*Total % may total more than 100% as respondents may choose more than one response; N=795

Additional activities engaged in along the scenic byway reported by online survey respondents are summarized in Table 3.6. The most common activities reported were bicycle riding (44.4%) and antique or sports car driving (12.7%), followed by motorcycle riding (3.2%). Many respondents noted other activities (34.9%), including walking, community events/attractions, and boating, hiking, or fishing, and several specified driving the byway in “regular” (rather than antique or sports) cars.

Table 3.6. Additional activities engaged in by online survey respondents

Activity	Frequency	%
Bicycle riding	28	44.4%
Antique-sports car driving	8	12.7%
Motorcycle riding	2	3.2%
Other	22	34.9%
Not sure	16	25.4%

*N=63

Places visited by survey respondents are summarized in Table 3.7. These places are identified as points of interest on the ROLHC scenic byway map and include locations at which in-person surveys were conducted. Columns two and three include places at which interviews were held, while the final two columns present locations identified by in-person respondents as “other places in the Volusia or Seminole County area” they planned to visit on the trip (overall, 228 respondents indicated an intention to visit other sites beyond their interview location).

Overall, the most commonly visited locations were Downtown DeLand (51.0%) – the location of several events at which attendees were interviewed – Blue Spring State Park (28.7%) and De Leon Springs (28.2%). These three destinations were also most likely to be cited by those interviewed at other locations as places they intended to visit during their trip to the ROLHC area.

Table 3.7. Places visited by survey respondents on the ROLHC

Place	Including Interview Site		Additional Places to Visit	
	Frequency	% (N=763)	Frequency	% (N=228)
Downtown DeLand	389	51.0%	105	46.1%
Blue Spring State Park	219	28.7%	71	31.1%
De Leon Springs	215	28.2%	30	13.2%
Central Florida Zoo	107	14.0%	27	11.8%
Hontoon Island State Park	101	13.2%	0	0.0%
Enterprise Heritage Museum	51	6.7%	1	0.4%
Gemini Springs State Park	40	5.2%	9	3.9%
Cassadaga Spiritualist Camp	25	3.3%	10	4.4%
Historic DeBary Hall	25	3.3%	0	0.0%
St. Johns River EcoTours	23	3.0%	6	2.6%
Barberville Pioneer Settlement	22	2.9%	4	1.8%
Sanford Museum	9	1.2%	4	1.8%
Seminole Rest	5	0.7%	0	0.0%
Other	22	2.9%	20	8.8%

*Total % may total more than 100% as respondents may choose more than one response

3.4 Number of Visits, Length of Stay, and Party Size

The average number of visits to the area (excluding those who were on their first trip to the area when interviewed in person), length of stay (current trip or past year), and party size (current or most recent trip) reported by survey respondents are shown in Table 3.8. The mean represents the arithmetic average, the median represents the “middle value” for the sample (half of the answers fall above, and half fall below this value), and the mode represents the most frequently given response. The standard deviation (SD) measures the amount of variability, or dispersion, from the individual data values to the mean.

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

	Mean (SD)	Median	Mode
<u>Number visits last year</u>			
Interview	15.6 (33.6)	4	2
Online	58.0 (102.7)	15	0
<u>Number nights stayed</u>			
Interview (current trip)	5.5 (5.4)	3	2
Online (past year)	95.5 (153.1)	6	4
<u>Number in party</u>			
Interview (current trip)	3.6 (3.8)	3	2
Online (most recent trip)	4.3 (5.3)	3	2

*N=203

The mean number of visits to the ROLHC area during the past year was 15.6 visits for interview respondents and 58.0 for online survey respondents. The median value, which is not impacted by extreme values, is 4 for interview respondents and 15 for online respondents. The most common number of trips reported was 2 for interview respondents, and 0 for online respondents.

The mean number of nights stayed in the area on the current trip for those interviewed in person was 5.5, with a median of 3 and a mode of 2. The mean number of nights stayed in the area over the past year for those completing the online survey was 95.5, with a median of 6 and a mode of 4. A substantial number of respondents stayed in the area for two or more months for the winter season.

The mean party size for the current trip was 3.6 persons (2.8 adults and 0.8 children) for in-person respondents. This group had a median party size of 3 (2 adults and 0 children) and a mode of 2 (2 adults and 0 children). The mean party size for the most recent trip for online respondents was 4.3, the median was 3, and the mode was 2.

3.5 Home Residence of Respondents

The home residence location by state 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, 57.6% were from Volusia County, 42.4% were from other counties in Florida.

In addition to Florida, respondents represented a total of 24 states, as well as international visitors. Within Florida, 98 cities were represented. The five Florida cities with the largest numbers of visitors were DeLand (22%), Deltona (9%), Orlando (7%), Orange City (5%), and Daytona Beach (4%).

The overall percentage of in-person survey respondents residing outside Volusia County (47.5%), combined with average annual daily traffic volume (11,675), percent of respondents aware of the byway (19.4%), and percent of respondents with a trip purpose of sightseeing, exploring history, or experiencing a rural area (17.7%), was used to calculate the share of new visitor spending in the county for the purpose of economic impact analysis (see Section 4 of this report).

Table 3.9. Home residence state of survey respondents

State	Frequency In-Person Respondents	% In-Person Respondents	Frequency All Respondents	% All Respondents
Florida	625	89.29%	710	89.31%
Georgia	8	1.14%	8	1.01%
Ohio	5	0.71%	5	0.63%
South Carolina	4	0.57%	4	0.50%
Pennsylvania	4	0.57%	4	0.50%
Texas	4	0.57%	4	0.50%
New York	3	0.43%	4	0.50%
Kentucky	3	0.43%	3	0.38%
Virginia	2	0.29%	2	0.25%
California	2	0.29%	2	0.25%
Connecticut	2	0.29%	2	0.25%
Wisconsin	2	0.29%	2	0.25%
Alabama	2	0.29%	2	0.25%
North Carolina	2	0.29%	2	0.25%
Michigan	2	0.29%	2	0.25%
Arizona	1	0.14%	1	0.13%
Indiana	1	0.14%	1	0.13%
Mississippi	1	0.14%	1	0.13%
Maryland	1	0.14%	1	0.13%
Nevada	1	0.14%	1	0.13%
Iowa	1	0.14%	1	0.13%
Louisiana	1	0.14%	1	0.13%
Montana	0	0.00%	1	0.13%
Tennessee	1	0.14%	2	0.25%
Washington	0	0.00%	1	0.13%
Foreign Resident	12	1.71%	12	1.51%
Refused	10	1.43%	10	1.26%
Non-Local (Outside Volusia County)	334	47.5%	370	46.54%

*N=700 (In-person Respondents); N=795 (All Respondents)

3.6 Satisfaction with Visitor Experience

Respondent satisfaction based on experience in the ROLHC area is summarized in Table 3.10. In terms of things to see and do, 95% were either very satisfied or moderately satisfied while only 2% were not satisfied. For attractiveness of area, 96% were either very satisfied or moderately satisfied while only 1% were not satisfied. For quality of restaurants, 70% were either very satisfied or moderately satisfied while 5% were not satisfied. For quality of shopping, 61% were either very satisfied or moderately

satisfied while 7% were not satisfied. Overall, visitors were most impressed with the area's attractiveness and activities and events.

Table 3.10. Satisfaction with trip experience reported by survey respondents

	Frequency	% of Respondents
Things to do		
Very satisfied	562	73.7%
Moderately satisfied	157	20.6%
Not satisfied	13	1.7%
Don't know	28	3.7%
Not applicable	3	0.4%
Attractiveness of the area		
Very satisfied	640	83.9%
Moderately satisfied	89	11.7%
Not satisfied	12	1.6%
Don't know	22	2.9%
Not applicable	0	0.0%
Quality of restaurants		
Very satisfied	382	50.1%
Moderately satisfied	149	19.5%
Not satisfied	40	5.2%
Don't know	55	7.2%
Not applicable	137	17.9%
Quality of shopping		
Very satisfied	307	40.2%
Moderately satisfied	163	21.4%
Not satisfied	52	6.8%
Don't know	82	10.7%
Not applicable	159	20.8%

*N=763

More than 83% of respondents reported they are very likely to visit the ROLHC area again in the future, nearly 14% would possibly visit again, and 1% indicated it is unlikely they would visit again (Table 3.11). These results show that the area is very attractive to visitors as a destination, and confirm the high level of satisfaction with the visitor experience.

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

Likely to Visit Again	Frequency	% of Responses
Very likely	663	83.4%
Possible	110	13.8%
Unlikely	11	1.4%
Not sure	11	1.4%

*N=795

3.7 Respondent Demographics

Demographics of survey respondents are summarized in Table 3.12. In terms of educational attainment, the sample was relatively highly educated, with 43% having a college degree, 22% having a graduate or professional degree, and 17% having had some college, while 13% had completed high school. Slightly more females (55%) than males (43%) answered the survey. The survey sample was fairly evenly divided across age groups, with about one in five respondents being either in their 30s (20%), 40s (21%), or 50s (18%).

Table 3.12. Demographic characteristics of survey respondents

	Frequency	% of Responses
<u>Education Level</u>		
Less than high school degree	4	0.5%
High school degree/GED	100	12.6%
Some college	134	16.9%
College degree	339	42.6%
Graduate/Professional degree	177	22.3%
Prefer not to answer	41	5.1%
<u>Gender</u>		
Male	337	42.4%
Female	436	54.8%
Prefer not to answer	22	2.8%
<u>Age (years)</u>		
18-29	88	11.1%
30-39	157	19.7%
40-49	170	21.4%
50-59	142	17.9%
60-69	117	14.7%
70-79	70	8.8%
80+	8	1.0%
Prefer not to answer	43	5.4%

*N=795

3.8 Visitor Spending

Trip spending reported by interview survey respondents is summarized in Table 3.13. The overall average spending per trip was \$160. The largest spending categories were restaurants/bars (\$39.17), shopping (\$29.70), gasoline and oil (\$25.38), and food and beverage stores (\$21.71), followed by lodging, rental vehicle, fees, entertainment, recreation gear, and other miscellaneous expenses.

The average trip spending for each respondent party was divided by the number days stayed to calculate average spending per party-day. For all interview respondents, total spending per group per day averaged \$120. Among non-local interview respondents (residing outside Volusia County) total spending averaged \$124 per group per day. The largest daily expenses for non-resident parties were

restaurants (\$29.94), gasoline (\$22.45), and shopping (\$19.29). Average group spending per day reported by nonlocal respondents was used for the economic impact analysis.

Table 3.13. Mean trip spending reported by survey respondents

Expense Category	Overall Interview Respondents Mean Per Group Per Trip	Average Per Day Interview Respondents Mean Per Group Per Day	Non-Local Interview Respondents Mean Per Group Per Day
Restaurants/bars	\$39.17	\$31.07	\$29.94
Food/beverage stores	\$21.71	\$15.23	\$16.17
Lodging	\$16.17	\$7.87	\$11.92
Rental vehicle	\$6.83	\$4.96	\$4.34
Gasoline/oil	\$25.38	\$20.48	\$22.45
Fees	\$10.93	\$8.50	\$11.66
Entertainment	\$5.25	\$3.57	\$3.30
Recreation gear	\$3.46	\$2.90	\$3.88
Shopping	\$29.70	\$24.47	\$19.29
Other expense	\$1.36	\$1.28	\$0.96
Total	\$159.96	\$120.34	\$123.91

3.9 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 friendliness of the local residents, the nice weather (especially during the wintertime), and the many opportunities for observing and preserving nature.

Additional comments received from the stakeholder interviews and focus group are summarized in full in Appendix D.

Table 3.14. Selected comments from survey respondents by survey location

Selected Comments from Survey Respondents	Survey Location
Excellent corridor with plenty to do and see	Online
In the early 2000s, I often came to visit FL friends & after driving on the ROL Scenic Highway decided this is the area I wanted to retire to.	Online
The area has improved greatly since I was a child. No empty store fronts and there is plenty to see and do.	Craft Fair DeLand
The place is fun to be at and the water is great	De Leon Springs
Very quiet and friendly	De Leon Springs
We like the nature. Please keep it underdeveloped.	Hontoon Island State Park
Very beautiful and ideal for nature viewing	Hontoon Island State Park
We love it, we'll keep coming back	Central Florida Zoo
I love the unique stores of Deland	Mardi Gras Dog Parade
Scenic downtown & very friendly place	Mardi Gras Dog Parade
Like living in a state park, Mayberry in the middle of the suburban area	Hot Dogs & Hot Rods
We really like the natural preserves of Volusia County	Hot Dogs & Hot Rods
Very nice downtown, very quaint	Bike Rally
I think the growth here is good, It respects the history and nature of the place but also creates amenities and opportunities for people	Bike Rally

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 the local area for each expense category, calculated as the mean amount per party-day multiplied by the average number of vehicle trips per day on the Scenic Highway (11,675), the share of nonlocal respondents measured in the survey (47.5%), the share of respondents who reported the primary purpose of their trip was sightseeing, experiencing a rural area, or exploring history (17.7%) and the share of nonresident respondents who were aware of the scenic byway (17.7%). Total annual visitor spending was estimated at \$528 million (M), and spending applicable for economic impact analysis was \$18.17 M, as shown in Table 4.1.

Table 4.1. Nonresident visitor spending by category for the River of Lakes Heritage Corridor, 2019

Spending Category	Mean spending per party-day	Annual visitor spending on byway	Spending qualified by primary purpose and byway awareness
Restaurants/bars	\$29.94	\$127,593,705	\$4,391,307
Food/beverage stores	\$16.17	\$68,895,946	\$2,371,145
Lodging	\$11.92	\$50,795,417	\$1,748,192
Rental vehicle	\$4.34	\$18,475,790	\$635,869
Gasoline/oil	\$22.45	\$95,675,916	\$3,292,814
Fees	\$11.66	\$49,707,708	\$1,710,757
Entertainment	\$3.30	\$14,048,167	\$483,486
Recreation gear	\$3.88	\$16,522,576	\$568,646
Shopping	\$19.29	\$82,187,268	\$2,828,584
Other expense	\$0.96	\$4,102,510	\$141,193
Total	\$123.91	\$528,005,002	\$18,171,993

Source: Florida Survey Research Center.

The estimated total annual applicable visitor spending was used to evaluate economic impacts associated with the ROLHC. Spending amounts were entered into the *IMPLAN* model for Volusia County in the appropriate industry sectors, as shown in Table 4.2. Values were specified as 2020 dollars, and the software applied output deflators to express in model year (2017) dollars, then indirect and induced impact results were reinflated to express in current (2020) dollars. The software also imputed direct employment for the expenditure amount based on industry average output per employee ratios.

Table 4.2. *IMPLAN* model Inputs for analysis of visitor spending in Volusia County associated with the ROLHC

<i>IMPLAN</i> Industry Sector	Industry sales	Employment (imputed)	Event year	Output deflator	GDP deflator	Local purchase percentage
501 Full-service restaurants	\$4,391,307	87	2020	1.028	1.027	100%
400 Retail good and beverage stores	\$2,371,145	10	2020	1.008	1.027	100%
499 Hotels and motels, including casino hotels	\$1,748,192	16	2020	1.027	1.027	100%
442 Automotive equipment rental and leasing	\$635,869	3	2020	1.009	1.027	100%
402 Retail gasoline stores	\$3,292,814	7	2020	1.010	1.027	100%
512 Other personal services	\$1,710,757	59	2020	1.032	1.027	100%
496 Other amusement and recreation industries	\$483,486	8	2020	1.029	1.027	100%
404 Retail sporting goods, hobby, musical instrument and bookstores	\$568,646	5	2020	1.010	1.027	100%
403 Retail clothing and clothing accessories stores	\$2,828,584	18	2020	1.010	1.027	100%
405 Retail general merchandise stores	\$141,193	1	2020	1.000	1.027	100%

Source: *IMPLAN* model for Volusia County, FL, 2017 (IMPLAN Group, LLC).

Total economic impacts of visitor spending associated with the ROLHC are summarized in Table 4.3. Total impacts included employment of 548 full-time and part-time jobs, \$9.7 M in labor income, \$14.8 M in value added or Gross Domestic Product, and \$26.0 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 347 jobs, indirect multiplier effects of 44 jobs, and induced effects of 157 jobs. These economic impacts represented 0.23% of total county employment, 0.10% of county labor income, 0.09% of county GDP and 0.09% of county industry output (refer to Table 2.4).

Table 4.3. Summary of annual economic impacts of visitor spending on the River of Lakes Heritage Corridor in Volusia County, Florida

Impact Type	Employment (Jobs)	Labor income (M\$)	Value added (M\$)	Output (M\$)
Direct Effect	347	\$4.9	\$6.6	\$11.7
Indirect Effect	44	\$0.9	\$1.7	\$3.2
Induced Effect	157	\$3.9	\$6.5	\$11.1
Total Effect	<u>548</u>	<u>\$9.7</u>	<u>\$14.8</u>	<u>\$26.0</u>
Values in millions 2020 dollars. Employment represents fulltime and part-time jobs. Source: <i>IMPLAN</i> model for Volusia County, FL, 2017 (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 (115 jobs), retail trade (56 jobs), other services (68 jobs), and health and social services (16 jobs).

Table 4.4. Annual economic impacts by industry group for visitor spending on the River of Lakes Heritage Corridor in Volusia County, Florida

NAICS Industry Group	Employment (Jobs)	Labor income (\$1000)	Value added (\$1000)	Output (\$1000)
11 Agriculture, forestry, fishing, hunting	1	\$4	\$16	\$19
21 Mining	<1	\$0	\$1	\$28
22 Utilities	<1	\$24	\$102	\$232
23 Construction	6	\$234	\$359	\$849
31-33 Manufacturing	1	\$28	\$49	\$140
42 Wholesale trade	3	\$173	\$352	\$554
44-45 Retail trade	56	\$1,398	\$2,301	\$4,016
48-49 Transportation, warehousing	3	\$146	\$177	\$342
51 Information	2	\$80	\$183	\$579
52 Finance, insurance	5	\$167	\$258	\$805
53 Real estate, rentals	14	\$312	\$2,265	\$3,661
54 Professional, scientific, technical services	9	\$419	\$562	\$1,033
55 Management of companies	1	\$132	\$155	\$281
56 Administrative, waste services	10	\$308	\$376	\$640
61 Educational services	3	\$102	\$107	\$179
62 Health, social services	16	\$901	\$1,009	\$1,711
71 Arts, entertainment, recreation	11	\$207	\$335	\$666
72 Accommodation, food services	115	\$2,831	\$3,785	\$6,902
81 Other services	68	\$1,405	\$1,404	\$2,287
92 Government	12	\$813	\$979	\$998
Total	<u>548</u>	<u>\$9,700</u>	<u>\$14,803</u>	<u>\$25,996</u>
Values in thousands 2020 dollars. Employment represents fulltime and part-time jobs. Estimates include all multiplier effects. NAICS is the North American Industry Classification System. Source: <i>IMPLAN</i> model for Volusia County, FL, 2017 (IMPLAN Group, LLC).				

Tax revenue impacts to state-local and federal governments are shown in Table 4.5. Total state-local tax impacts were \$1.72 M, and total federal tax impacts were \$2.19 M. The largest state-local tax items were sales tax (\$882,000) and property tax (\$591,000), while the largest federal tax items were social insurance or Social Security payroll taxes for the employee contribution (\$639,000) and employer contribution (\$548,000), and personal income tax (\$747,000).

Table 4.5. Annual government tax revenue impacts of visitor spending on the River of Lakes Heritage Corridor in Volusia County, Florida

Tax Item	Amount (\$1000)
<u>State and Local Taxes</u>	
Dividends	\$3,506
Social Ins Tax- Employee Contribution	\$0
Social Ins Tax- Employer Contribution	\$0
Tax on Production and Imports (TOPI): Sales Tax	\$881,709
TOPI: Property Tax	\$591,330
TOPI: Motor Vehicle Licenses	\$11,642
TOPI: Severance Tax	\$687
TOPI: Other Taxes	\$111,240
TOPI: S/L Non-Taxes	\$30,270
Corporate Profits Tax	\$18,145
Personal Tax: Income Tax	\$0
Personal Tax: Non-Taxes (Fines-Fees)	\$56,408
Personal Tax: Motor Vehicle License	\$7,455
Personal Tax: Property Taxes	\$3,811
Personal Tax: Other Tax (Fishing/Hunting)	\$393
Total State and Local Tax	\$1,716,596
<u>Federal Taxes</u>	
Social Ins Tax- Employee Contribution	\$638,863
Social Ins Tax- Employer Contribution	\$548,447
TOPI: Excise Taxes	\$99,260
TOPI: Custom Duty	\$41,166
TOPI: Fed Non-Taxes	\$6,442
Corporate Profits Tax	\$106,460
Personal Tax: Income Tax	\$746,570
Total Federal Tax	\$2,187,208
Values in 2020 dollars. Estimates include all multiplier effects. Source: IMPLAN model for Volusia County, FL, 2017 (IMPLAN Group, LLC).	

The SROI for designation of the ROLHC was calculated based on the value added impact for applicable nonresident visitor spending in 2019 (\$14.8 M, Table 4.3) used as the benefit, and the value of cumulative volunteer hours and FDOT technical support as the cost or “investment”. FDOT technical support for the Scenic Highways Program since 2010 that are attributable to the ROLHC were estimated at \$188,469, and over the period January 2010 to December 2019 there were a total of 14,598 volunteer hours, which were valued at \$341,359 based on the federal IRS hourly rate allowed for non-profit organizations (\$22.55 to \$24.69 per hour), giving a total nominal value for volunteer, staff and consultant time of \$529,828, as shown in Table 4.6. Values across this ten-year period were adjusted for inflation using the U.S. GDP Implicit Price deflator, with total costs calculated as \$572,904 in constant 2020 dollars. Note that this value did not include state and local costs for highway repairs and infrastructure improvements that may be related to or in support of the scenic byway.

Table 4.6. Cost detail by year for volunteer time, FDOT technical support for creation and management of the River of Lakes Heritage Corridor

Year	Volunteer hours	IRS hourly volunteer rate (\$/hr)	Value volunteer time	Allocated value for FDOT staff and consultants	Total value volunteers, staff, consultants	Deflator to 2020*	Total value 2020 dollars
2010	1,462	\$21.36	\$31,228		\$31,228	1.188	\$37,092
2011	1,194	\$21.79	\$26,017		\$26,017	1.166	\$30,336
2012	1,434	\$22.14	\$31,749		\$31,749	1.142	\$36,259
2013	1,192	\$22.55	\$26,880		\$26,880	1.122	\$30,146
2014	1,496	\$23.07	\$34,513		\$34,513	1.102	\$38,031
2015	1,694	\$23.56	\$39,911	\$31,251	\$71,161	1.090	\$77,546
2016	1,824	\$24.14	\$44,031	\$28,172	\$72,203	1.081	\$78,044
2017	1,868	\$24.69	\$46,121	\$42,831	\$88,952	1.060	\$94,247
2018	1,334	\$24.69	\$32,936	\$42,955	\$75,892	1.037	\$78,720
2019	1,100	\$25.43	\$27,973	\$43,260	\$71,233	1.018	\$72,483
Total	14,598		\$341,359	\$188,469	\$529,828		\$572,904
*U.S. GDP Implicit Price Deflator, U.S. Commerce Dept., Bureau of Economic Analysis, retrieved from St. Louis Federal Reserve, https://fred.stlouisfed.org .							

Table 4.7 presents the summary benefit-cost ratio and ROI values for the River of Lakes Heritage Corridor. Because data for traffic volumes were only available for a five-year period, initial calculations cover only this time frame.

The total benefits of \$70.0 M over the five-year period 2015-19 were estimated from the annual value added impact of visitor spending in 2019 (\$14.8 M), expanded to reflect the average annual daily traffic volumes in each year as a share of 2019 traffic levels, which ranged from 85.0% to 99.5%. The logic of this analysis is that the costs incurred for creation and maintenance of the scenic byway produce a stream of benefits over time. The benefit-cost ratio was calculated as the [Benefit (\$70.0 M) minus Investment (\$572,904)] divided by Investment (\$572,904), which equals 24.8. In other words, the net economic benefits of the scenic byway were nearly 25 times the cumulative investment.

However, to calculate the investment costs more accurately since the inception of the byway, calculations are next extrapolated to a 10-year timeframe (even though only five years of traffic-volume data were available). Moreover, a ten-year period limits the impact of any one- or two-year period that may not be typical. Thus, the average annual rate of return on investment was calculated as the benefit-cost ratio minus one, divided by 10 (years), which equals 238%.

Note that this benefit-cost and ROI estimate differs from the previous study for Sumter County by including benefits over a multi-year period instead of only one year.

Table 4.7. Cost-Benefit analysis and return on investment for the River of Lakes Heritage Corridor

<u>Costs:</u> value of volunteer time, FDOT technical support for creation and management of the scenic byway, 2010-19	\$572,904
<u>Benefits:</u> value added impact of visitor spending in Volusia County FL, 2015-19	\$69,966,494
<u>Benefit-Cost ratio</u> (Benefit-Cost / Cost)	24.8
<u>Average Annual Rate of Return on Investment, 2010-19</u>	238%
Values in 2020 dollars. Benefits for 2015-19 calculated using length-weighted average daily traffic volumes as a percentage of 2019 levels (Table 2.2. Annual ROI calculated as BC ratio minus one, divided by 10 (years).	

5. Conclusions and Recommendations

This study was intended to document the value of an FSHP designation on its local communities. To accomplish this the study sought to assess usage patterns, experiences, and local spending by visitors to the River of Lakes Heritage Corridor in Volusia and Seminole Counties, Florida. This was accomplished through the use of various survey/data collection techniques conducted beginning in September 2019 and continuing through the first week of March 2020 (when events and travel locations were canceled and closed due to the COVID-19 pandemic), including a focus group, interviews with local stakeholders, survey interviews at representative locations along the byway, and an online survey.

The surveys and interviews with stakeholders clearly showed that many people feel very passionate about the rural and historic character and scenic beauty of the ROLHC region. According to survey results, respondents visited the area an average of 15.6 times per year, stayed 6 days per trip, and spent \$120 to \$124 per group per day in the area. Overall, 25% of survey respondents were aware of the ROLHC. Some 48% of respondents were from outside the county, indicating that the area is attractive to outside visitors from other states and other counties in Florida. Among nonresident respondents, 17.7% reported sightseeing, exploring rural areas, 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 548 full-time and part-time jobs, \$9.7 million in labor income, \$14.8 million in value added or Gross Domestic Product, and \$26.0 million in industry output or business revenues. These economic impacts represented 0.23% of total county employment, 0.10% of county labor income, 0.09% of county GDP and 0.09% of industry output for Volusia County.

The Social Return on Investment (SROI) of scenic byways includes the positive economic spillovers of state monies and private economic activity. The social return on investment to the ROLHC is very attractive from a public policy standpoint: the net economic benefits of the scenic byway were nearly 25 times the cumulative investment and reflect the dedication and commitment of the organizations' volunteers over the ten-year reporting period.

Thus, the ROLHC 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 ROLHC support efforts to increase access to a greater diversity of food and accommodation options for travelers; respondents note, in particular, a preference for small, independent restaurants rather than chain franchises. Additionally, comments received during the study noted some issues with traffic, particularly around larger cities, and some commented on accommodations for the elderly and other special-needs populations. Many participants noted that controlling development to preserve the natural state of the region was imperative.

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: ROLHC Heritage Byway Onsite Interview Survey Questionnaire

River of Lakes Heritage Corridor Visitor Survey

*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 *River of Lakes Heritage Corridor*? ☐ 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 ☐ Advertisement ☐ Byway map ☐ Word of mouth ☐ Social media ☐ Internet/website ☐ 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, kayaking, 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 Volusia or Seminole County area on this trip? If so, please name them or show on the map. [Check any below or list others]
☐ Barberville Pioneer Settlement ☐ Enterprise Heritage Museum

- ☐ Blue Spring State Park ☐ Gemini Springs State Park
☐ Cassadaga Spiritualist Camp ☐ Historic DeBary Hall
☐ Central Florida Zoo ☐ Sanford Museum
☐ De Leon Spring ☐ Seminole Rest
☐ Downtown DeLand ☐ St. Johns River EcoTours
☐ 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 restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of shopping	<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 (Volusia and Seminole Counties) 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? _____ O Foreign resident O Refused
18. In what year were you born? _____ O Refused
19. What is the highest level of education you completed?
- | | |
|--|--|
| O Primary school (through 9 th grade) | O College degree (associate's or bachelor's) |
| O High school diploma or GED | O Graduate/Professional degree |
| O Some college, no degree | O Refused |

20. Respondent gender [Interviewer record, do not ask] O Male O 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: ROLHC Heritage Byway Online Survey Questionnaire

River of Lakes Heritage Corridor Online Visitor Survey

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.

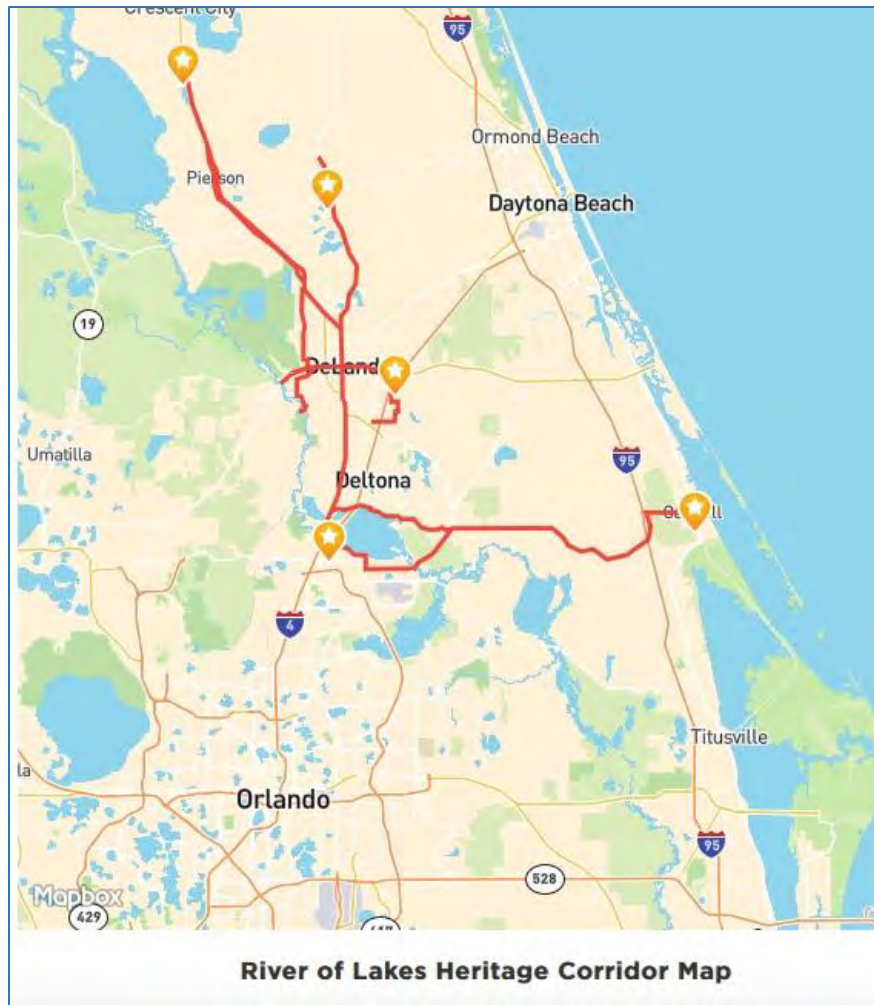


2. Have you ever engaged in any of the following activities on Florida's scenic highways? [Please mark ALL that apply.]
 - ☐ Motorcycle riding
 - ☐ Bicycle riding
 - ☐ Antique or sports car driving
 - ☐ Other (describe): _____
 - ☐ Not sure
 - ☐ Prefer not to answer

River of Lakes Heritage Corridor

Next, we have some more specific questions about the River of Lakes Heritage Corridor.

The 156-mile River of Lakes Heritage Corridor is a Scenic Highway which unfolds along the St. Johns River in Central Florida. It runs just east of the St. Johns River through Volusia and Seminole counties, as shown on the map below.



3. More specifically, are you aware of the *River of Lakes Heritage Corridor* in Volusia and Seminole Counties, Florida? [YNDR]

[IF NO, Not sure, Prefer not to answer → GO TO Q5 intro]

IF YES:

4. How did you find out about the *River of Lakes Heritage Corridor*? [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 *River of Lakes Heritage Corridor*?

Number of visits: [# , DR]

[If 0, Not sure, Prefer not to answer → GO TO Q15]

6. Did you stay overnight in the Volusia County or Seminole County area on any of those trips? [YNDR]

IF YES:

6A. How many nights did you stay overnight in the Volusia County or Seminole County area while visiting or traveling the *River of Lakes Heritage Corridor* in the past year? [# , DR]

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

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, kayaking, 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 *River of Lakes Heritage Corridor* 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 *River of Lakes Heritage Corridor Byway*? [Please mark ALL that apply.]

- ☐ Barberville Pioneer Settlement
- ☐ Blue Spring State Park
- ☐ Cassadaga Spiritualist Camp
- ☐ Central Florida Zoo
- ☐ De Leon Spring
- ☐ Downtown DeLand
- ☐ Enterprise Heritage Museum
- ☐ Gemini Springs State Park
- ☐ Historic DeBary Hall
- ☐ Sanford Museum
- ☐ Seminole Rest
- ☐ St. Johns River EcoTours
- ☐ 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 restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of shopping	<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 Volusia County or Seminole County area in the past year? [# , DR]

13. Please estimate the amount that you and your immediate party spent in the Volusia County or Seminole 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 *River of Lakes Heritage Corridor* 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 *River of Lakes Heritage Corridor* 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 investigator:

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

Appendix D: Open-Ended Comments by Survey Respondents

Question/Comment	Location
<i>How did you find out about this event?</i>	
Business owner downtown DeLand	DeLand Craft Show
News	DeLand Craft Show
Volunteer for the event	Hot dogs & Hot Rods
Enterprise Museum	Online
Friends	Online
I work with our District assisting local government agencies to acquire R/W	Online
Information at work	Online
Local Area Hikers for FL Parks, Trail Maps and APPS such as google maps	Online
Local government contact	Online
Member of other Byway organizations	Online
My Employer	Online
Read about a couple of them in a FL day trip book	Online
River of Lakes Heritage Corridor meetings	Online
Scenic Highways Calendar	Online
Signs on the road and the internet	Online
While visiting Historic DeBary Hall	Online
Work related	Online
<i>Other Purposes of Trip</i>	
Christmas shopping	DeLand Craft Show
Craft fair	DeLand Craft Show
Book launch	DeLand Craft Show
Vendor	DeLand Craft Show
Meet new people	Boat Parade
Wife loves to shop	De Leon Springs
Arts	De Leon Springs
Check out art craft	De Leon Springs
Bring babies to area	De Leon Springs
See art	De Leon Springs
Move to area	De Leon Springs
Something in nature	De Leon Springs
Just here to swim	De Leon Springs
Fun	De Leon Springs
Get some sun	De Leon Springs
Fun bay	De Leon Springs
Nice weather	De Leon Springs
Enjoying the weather	De Leon Springs

<i>Other Purposes of Trip (con't)</i>	
Camping	Hontoon Island State Park
Relationship building	Hontoon Island State Park
Swimming	Hontoon Island State Park
Camping	Hontoon Island State Park
Camping	Hontoon Island State Park
Study anatomy (for art)	Central Florida Zoo
Volunteer	Central Florida Zoo
Fun	Central Florida Zoo
Splash pad, train ride	Central Florida Zoo
No response given	Central Florida Zoo
Field trip Full Sail University	Central Florida Zoo
Bringing a friend to visit DeLand	Mardi Gras Dog Parade
Record store	Mardi Gras Dog Parade
Shopping & eating	Mardi Gras Dog Parade
Visiting in DeLand	Mardi Gras Dog Parade
Sponsor Orange City Racing & Car Club	Mardi Gras Dog Parade
Shopping	Mardi Gras Dog Parade
Vendor at parade	Mardi Gras Dog Parade
Sponsor Advance America	Mardi Gras Dog Parade
Never knew about events in DeLand	Mardi Gras Dog Parade
Love the scenery	Mardi Gras Dog Parade
Skateboarding for fun	Mardi Gras Dog Parade
Have lunch	Mardi Gras Dog Parade
Enjoy lunch downtown	Mardi Gras Dog Parade
Support the museum	Hot dogs & Hot Rods
ATV Trails	Online
Car club cruise	Online
Employment	Online
I live and work in DeLand	Online
I live in DeBary and use some of these roads weekly	Online
I work on aquatic habitats, and some of my work sites fall in the River of Lakes Heritage Corridor	Online
Job related trip	Online
Live here	Online
Native ecosystem and native plant viewing	Online
Running a bicycle tour	Online
Work	Online
Work related travel	Online
Work routes	Online

Other Places to Visit on Trip	
Epcot	Central Florida Zoo
Just art craft	De Leon Springs
Seminole County	De Leon Springs
Woodruff Lake	Hontoon Island State Park
Hontoon	Hontoon Island State Park
Movies	De Leon Springs
Lake George State Forest, Hontoon Island state Park	Online
Lake Monroe, Green Springs, Lake George & Cross Florida Barge Canal	Online
Other Expenses	
Box of crayons	De Leon Springs
State Parks Pass; this is annual versus single use so it is hard to attribute to the visits to De Leon and Blue Spring	Online
Other Ways to Share about Experience	
Articles	Online
Being with me in person	Online
Shared brochure	Online
Taken friends & family with me	Online
Text	Online
Texting	Online
General Comments	
Excellent corridor with plenty to do and see	Online
I love Florida. The beaches, the forest, the rivers, the springs...on and on...the small towns and the cities...diverse ecology...and finally Go Gators	Online
I would like to see River of Lakes Corridor connected to St. John's River to the Sea Loop in some fashion	Online
In the early 2000s, I often came to visit FL friends & after driving on the ROL Scenic Highway decided this is the area I wanted to retire to	Online
It's a great program and it values our culture and environment; Finances are a problem with most Byway organizations; This must improve & increase fund	Online
Love the scenic byways and the roadside flowers in spring	Online
More emphasis on the bike trails that are available would be helpful	Online
Our visits to the two parks indicated were with The Villages Segway Club (60-80 riders) over 3-4 days.	Online
Overall, I believe FL does a great job preserving natural FL; We travel throughout US for hiking and ATV trails and appreciate the state we live	Online
Please provide amenities to these future projects to help accommodate elders	Online

General Comments (con't)	
The exotic invasive plant species outnumber the native plant species and restoration/conservation management needs are not being met	Online
Traffic bottlenecks when coming into DeLand and comes to a complete stop; Traffic coming into DeLand is TERRIBLE!	Online
Would like to see more trees and wildflowers along the highways and less clear cutting for development and over-manicured grass	Online
Would not want to see scenic highways expanded or widened; keep rural character; do NOT build new highways in western FL or Panhandle!!	Online
Just moved here 3 months ago	Craft Fair DeLand
Town greatly supported by locals. The community is very active in civic and economic efforts	Craft Fair DeLand
I moved here 2 years ago because my family lives here. It is a nice community with many activities	Craft Fair DeLand
More events for downtown	Craft Fair DeLand
Always very nice	Craft Fair DeLand
The area has improved greatly since I was a child. No empty store fronts and there is plenty to see and do	Craft Fair DeLand
DeLand does a good job hosting events for the community	Craft Fair DeLand
Downtown DeLand has changed for the better over the years	Craft Fair DeLand
Pretty nice, people are friendly	Boat Parade
The area is nice and safe	De Leon Springs
Very quiet and friendly	De Leon Springs
DeLand is great	De Leon Springs
It is wonderful, it is a place for everyone	De Leon Springs
Love seeing the art	De Leon Springs
Looking at different art	De Leon Springs
Nice area	De Leon Springs
Me and my family love it so far	De Leon Springs
I love how the layout is	De Leon Springs
Just love the Springs	De Leon Springs
Everyone is very nice and easy going	De Leon Springs
The place is fun to be at and the water is great	De Leon Springs
Most of the places are clean and quiet	De Leon Springs
Nature seems very fine	De Leon Springs
Love the natural feel of it. Not too commercialized	De Leon Springs
Lived here for 30 years and will not leave	De Leon Springs
Just what we expected	De Leon Springs
Nice, shady and homey	Hontoon Island State Park
Love the place	Hontoon Island State Park
The place is nice	Hontoon Island State Park
Just here to relax	Hontoon Island State Park

General Comments (con't)	
We like the nature. Please keep it underdeveloped	Hontoon Island State Park
Just started to enjoy the area. We lived here for 10 years and are just now beginning to explore	Hontoon Island State Park
Beautiful place	Hontoon Island State Park
Very relaxing being in nature	Hontoon Island State Park
The handicap access is in disrepair. Presence of algae may indicate improper treatment of water	Hontoon Island State Park
Keep everything as it is. Both, nature and the culture of the area	Hontoon Island State Park
Very beautiful and ideal for nature viewing	Hontoon Island State Park
They should add sidewalks and not destroy the woods	Hontoon Island State Park
Beautiful place	Hontoon Island State Park
So great	Central Florida Zoo
Recommended	Central Florida Zoo
Lots to do, here all the time	Central Florida Zoo
We love the zoo	Central Florida Zoo
We love it, well keep coming back	Central Florida Zoo
Really beautiful and refreshing	Central Florida Zoo
Keep Deland clean	Central Florida Zoo
Zoo could be better in regards to size of cages. Miami zoo should serve as a model	Central Florida Zoo
More information about the area, especially a clearer map of the zoo	Central Florida Zoo
Expand downtown DeLand; make it resemble Winter Park	Central Florida Zoo
I love the unique stores of DeLand	Mardi Gras Dog Parade
It's a great place	Mardi Gras Dog Parade
Definitely better than the panhandle of Florida	Mardi Gras Dog Parade
Love it	Mardi Gras Dog Parade
Less people would be desirable	Mardi Gras Dog Parade
Love it	Mardi Gras Dog Parade
Lovely place	Mardi Gras Dog Parade
Stop housing growth and preserve natural area	Mardi Gras Dog Parade
Scenic downtown & very friendly place	Mardi Gras Dog Parade
I love the downtown. DeLand keeps winning Main Street America Award	Mardi Gras Dog Parade
No better place	Mardi Gras Dog Parade
Moved down here for Barclay Square Dog Park	Mardi Gras Dog Parade
Love it	Mardi Gras Dog Parade
Very attractive downtown	Mardi Gras Dog Parade
Too many homeless, need bigger park	Mardi Gras Dog Parade
Needs public transportation, deli	Mardi Gras Dog Parade
More variety of shops	Mardi Gras Dog Parade
More nature, green spaces	Mardi Gras Dog Parade

General Comments (con't)	
Just arrived , waiting for the show to start	Mardi Gras Dog Parade
Great weather	Mardi Gras Dog Parade
Nice evening	Mardi Gras Dog Parade
Great parade, Needs more shopping for younger crowd	Mardi Gras Dog Parade
Nice weather at first then got a little cold, sold a lot of lemonade	Mardi Gras Dog Parade
Nice people	Mardi Gras Dog Parade
Wonderful day so far	Mardi Gras Dog Parade
Nice event	Mardi Gras Dog Parade
Could have more food vendors	Mardi Gras Dog Parade
Enjoying the parade and free gifts from vendors	Mardi Gras Dog Parade
I remember this place from my childhood	Mardi Gras Dog Parade
Show/parade was OK!	Mardi Gras Dog Parade
Weather a little chilly	Mardi Gras Dog Parade
Love downtown DeLand	Mardi Gras Dog Parade
Nice parade	Mardi Gras Dog Parade
Lovely day	Mardi Gras Dog Parade
We love downtown DeLand	Mardi Gras Dog Parade
Love the antique shops	Mardi Gras Dog Parade
OK day & parade	Mardi Gras Dog Parade
Love the pizza restaurant downtown	Mardi Gras Dog Parade
More home cooking restaurants	Hot Dogs & Hot Rods
Like living in a state park, Mayberry in the middle of the suburban area	Hot Dogs & Hot Rods
More restaurants but not franchises, independent businesses	Hot Dogs & Hot Rods
Get it done!	Hot Dogs & Hot Rods
Beautiful! I've always loved this area	Hot Dogs & Hot Rods
Thrilled with way things have been going here	Hot Dogs & Hot Rods
Nice cars out here	Hot Dogs & Hot Rods
OK weather & history	Hot Dogs & Hot Rods
Hot Dogs & Hot Rods is a great event	Hot Dogs & Hot Rods
Beautiful day	Hot Dogs & Hot Rods
Nice event	Hot Dogs & Hot Rods
Weather great	Hot Dogs & Hot Rods
OK day could've been more attractions	Hot Dogs & Hot Rods
Enjoyed the story behind history of building/museum	Hot Dogs & Hot Rods
Great day	Hot Dogs & Hot Rods
I liked it very much, I'm concerned with traffic & development	Hot Dogs & Hot Rods
Attractive scenery	Hot Dogs & Hot Rods
County Commissioner needs to stop pushing for sewers- sewage is polluting the area	Hot Dogs & Hot Rods
We really like the natural preserves of Volusia County	Hot Dogs & Hot Rods

General Comments (con't)	
Traffic is too heavy but I love the area, we need more controls on development	Hot Dogs & Hot Rods
Leave nature the way it is, no more development	Hot Dogs & Hot Rods
Enterprise is a beautiful area, no more development & maintain sense of history	Hot Dogs & Hot Rods
Lovely place	Hot Dogs & Hot Rods
Love it here	Hot Dogs & Hot Rods
Very calm place to live	Hot Dogs & Hot Rods
Area needs to be spruce up, Some of the houses need renovation	Hot Dogs & Hot Rods
Very beautiful place	Bike Rally
I enjoy the place greatly	Bike Rally
Super place	Bike Rally
Very nice downtown, very quaint	Bike Rally
Traffic on 44 is too much, Need to change the 2 lanes to 4 lanes, create roundabouts	Bike Rally
I love DeLand and surrounding area	Bike Rally
Perfect place to live and raise kids	Bike Rally
Improve some older buildings, certain buildings appear dilapidated	Bike Rally
Too much traffic on 44	Bike Rally
Beautiful place	Bike Rally
I think the growth here is good, It respects the history and nature of the place but also creates amenities and opportunities for people	Bike Rally
The number of vendors on Bike Day has dropped off	Bike Rally

Appendix E: Results for analysis with IMPLAN model for Volusia and Seminole Counties

As 94% of the miles in the ROLHC are in Volusia County, Florida, the primary economic analysis model (see Section 4, above) was constructed based on that county. However, a small portion of the mileage is in Seminole County, so the following tables contain the same economic analyses modeled with *IMPLAN*, using both Volusia and Seminole counties combined. This ancillary analysis is added here for completeness, to show impacts in the broader region, but due to the small area of the ROLHC contained in Seminole County, the impact of the byway should most appropriately be drawn from the analysis of Volusia County presented in Section 4, above.

Table A. Summary of economic impacts of visitor spending on the River of Lakes Heritage Corridor in Volusia and Seminole Counties, Florida

Impact Type	Employment (Jobs)	Labor income (M\$)	Value added (M\$)	Output (M\$)
Direct Effect	347	\$5.0	\$6.6	\$11.7
Indirect Effect	44	\$1.2	\$2.1	\$3.8
Induced Effect	157	\$4.6	\$8.0	\$13.4
Total Effect	<u>548</u>	<u>\$10.8</u>	<u>\$16.8</u>	<u>\$29.0</u>

Values in 2020 dollars. Employment represents fulltime and part-time jobs.

Source: *IMPLAN* model for Volusia and Seminole County, FL, 2017 (IMPLAN Group, LLC).

Table B. Economic impacts by industry group for visitor spending on the River of Lakes Heritage Corridor in Volusia and Seminole Counties, Florida

NAICS Industry Group	Employment (Jobs)	Labor income (\$1000)	Value added (\$1000)	Output (\$1000)
11 Agriculture, forestry, fishing, hunting	1	\$3	\$12	\$14
21 Mining	<1	\$0	\$1	\$23
22 Utilities	<1	\$49	\$204	\$456
23 Construction	7	\$348	\$558	\$1,203
31-33 Manufacturing	1	\$31	\$50	\$143
42 Wholesale trade	3	\$267	\$519	\$752
44-45 Retail trade	57	\$1,475	\$2,427	\$4,170
48-49 Transportation, warehousing	4	\$180	\$228	\$429
51 Information	2	\$163	\$334	\$861
52 Finance, insurance	7	\$382	\$599	\$1,478
53 Real estate, rentals	15	\$296	\$2,560	\$4,061
54 Professional, scientific, technical services	11	\$585	\$728	\$1,266
55 Management of companies	2	\$200	\$235	\$430
56 Administrative, waste services	12	\$389	\$480	\$778
61 Educational services	3	\$104	\$108	\$172
62 Health, social services	16	\$882	\$1,002	\$1,680
71 Arts, entertainment, recreation	11	\$210	\$334	\$665
72 Accommodation, food services	116	\$2,859	\$3,818	\$6,966
81 Other services	67	\$1,547	\$1,493	\$2,359
92 Government	13	\$871	\$1,066	\$1,103
Total	548	\$10,839	\$16,755	\$29,007

Values in 2020 dollars. Employment represents fulltime and part-time jobs. Estimates include all multiplier effects. NAICS is the North American Industry Classification System.

Source: *IMPLAN* model for Volusia and Seminole County, FL, 2017 (IMPLAN Group, LLC).

Table C. Government tax revenue impacts of visitor spending on the River of Lakes Heritage Corridor in Volusia and Seminole Counties, Florida

Tax Item	Amount (\$1000)
<u>State and Local Taxes</u>	
Dividends	\$4
Social Ins Tax- Employee Contribution	\$0
Social Ins Tax- Employer Contribution	\$0
Tax on Production and Imports (TOPI): Sales Tax	\$988
TOPI: Property Tax	\$569
TOPI: Motor Vehicle Licenses	\$13
TOPI: Severance Tax	\$1
TOPI: Other Taxes	\$112
TOPI: S/L Non-Taxes	\$33
Corporate Profits Tax	\$28
Personal Tax: Income Tax	\$0
Personal Tax: Non-Taxes (Fines-Fees)	\$65
Personal Tax: Motor Vehicle License	\$8
Personal Tax: Property Taxes	\$4
Personal Tax: Other Tax (Fishing/Hunting)	\$0
Total State and Local Tax	<u>\$1,826</u>
<u>Federal Taxes</u>	
Social Ins Tax- Employee Contribution	\$668
Social Ins Tax- Employer Contribution	\$576
TOPI: Excise Taxes	\$121
TOPI: Custom Duty	\$50
TOPI: Fed Non-Taxes	\$8
Corporate Profits Tax	\$162
Personal Tax: Income Tax	\$855
Total Federal Tax	<u>\$2,440</u>

Values in 2020 dollars. Estimates include all multiplier effects.

Source: *IMPLAN* model for Volusia and Seminole County, FL, 2017

(IMPLAN Group, LLC).

Table D. Cost-Benefit analysis and return on investment for the River of Lakes Heritage Corridor in Volusia and Seminole Counties, Florida

<u>Costs</u> : value of volunteer time, FDOT technical support for creation and management of the scenic byway, 2010-19	\$572,904
<u>Benefits</u> : value added impact of visitor spending in Volusia County and Seminole County, FL, 2015-19	\$79,187,957
<u>Benefit-Cost ratio</u> (Benefit-Cost / Cost)	28.2
Average annual Rate of Return on Investment, 2015-19	272%

Values in 2020 dollars. Benefits for 2015-19 calculated using length-weighted average daily traffic volumes as a percentage of 2019 levels. Annual ROI calculated as BC ratio minus one, divided by 10 (years).

Appendix F: Comments from Local Stakeholders and Focus Group Participants

Local Stakeholder Interview Comments – Summaries

Volusia County Parks and Recreation

1. How would you describe the Florida Scenic Highway Program and what it does in the state?
 - Although I have never attended a meeting, I know that they have a positive influence on the community.
2. What role does your organization play, if any, in the *River of Lakes Heritage Corridor Scenic Highway* byway organization?
 - They refer to our sites and trails. Their marketing alerts people who would otherwise not know about our natural sites.
3. What are some ways that the *River of Lakes Heritage Corridor Scenic Highway* affects your particular community?
 - They do attract tourism with their campaign that is marketed towards both out of state visitors and Florida residents.
4. How would you describe a **typical tourist** visiting the region?
 - I'm not sure. I don't have access to those figures.
5. And, how would you describe a **typical Byway visitor**?
 - Not sure. I imagine it would be a good mix of other states and countries and in-state.
6. How do most folks in your area find out about the Byway?
 - The kiosks are certainly helpful and social media is another vehicle that spreads information about our trails and sites.
7. How much of an economic impact does the *River of Lakes Heritage Corridor Scenic Highway* have on your community?
 - I don't possess the figures, but ROLHC without a doubt positively influences the area. There are no studies I am aware of, but I have never heard anything negative about them (ROLHC).
8. What could be done by the ROLHC byway organization to help strengthen the local economy? Are improvements or promotions needed to increase awareness or visitation?
 - The Volusia Trail Welcome Center is being built on I-4. ROLHC could help us with promoting this new structure. They should have a presence there, either a brochure or a computer link promoting it would be helpful.
9. Are there any other recent visitor impact studies for your community that we should be aware of as we proceed?
 - None that we've conducted or could point to.
10. Would you please suggest some events, attractions, and locations along the ROLHC that would provide a good opportunity to conduct these interviews in your community?
 - In October, there is a foot race (half marathon) on the trail. A projected 1300 participants are coming in. It's put on by *Runner's High*.
11. Finally, do you have any additional comments regarding the *River of Lakes Heritage Corridor Scenic Highway* or suggestions to guide us as we implement this research?
 - None. They seem to do a fine job.

West Volusia Tourism

1. How would you describe the Florida Scenic Highway Program and what it does in the state?
 - I represent 14 communities, Florida Black Bear Scenic, and River of Lakes. ROLHC is very involved in the community and helps the economy.
2. What role does your organization play, if any, in the *River of Lakes Heritage Corridor Scenic Highway* byway organization?
 - We are involved in board meetings and help with promotion. We recently produced a video for tourism.
3. What are some ways that the *River of Lakes Heritage Corridor Scenic Highway* affects your particular community?
 - They produce a fantastic map for our visitor centers and travel shows.
4. How would you describe a **typical tourist** visiting the region?
 - The majority of our visitors are from in state. Day trippers are the majority, going to the beach and the three state parks.
5. And, how would you describe a **typical Byway visitor**?
 - Not sure. Our person is probably more of a “Boomer” woman.
6. How do most folks in your area find out about the Byway?
 - A combination of all of the above. Again, their map is fantastic.
7. How much of an economic impact does the *River of Lakes Heritage Corridor Scenic Highway* have on your community?
 - It plays a majority part, along with other organizations, on the tourism in the area. People cannot believe how much there is to do here. I put our area up to much larger attractions out of state.
8. What could be done by the ROLHC byway organization to help strengthen the local economy? Are improvements or promotions needed to increase awareness or visitation?
 - We could step-up our public relations program in the area.
9. Are there any other recent visitor impact studies for your community that we should be aware of as we proceed?
 - We work with the Mid-Florida Marketing and Research. They do a yearly economic study for the entire county. They also put out a monthly average daily rate and occupancy report.
10. Would you please suggest some events, attractions, and locations along the ROLHC that would provide a good opportunity to conduct these interviews in your community?
 - Biggest attractions: The Blue Springs State Parks; starting in November, there's the manatee attraction. De Leon Springs and Cassadaga are also major attractions. Biggest days are Saturday and Sunday. Gala Day at Cassadaga is on November 16, 2019. Main Street DeLand, Art Festival in November. Beer Fest in March. Bike Rally in downtown DeLand; dates uncertain.
11. Finally, do you have any additional comments regarding the *River of Lakes Heritage Corridor Scenic Highway* or suggestions to guide us as we implement this research?
 - No. We are fortunate to have an agency that does so much good work.

Orange City

1. How would you describe the Florida Scenic Highway Program and what it does in the state?
 - A group of important people got together and decided that 17/92 needed to be preserved as a scenic highway. They wrote a policy encouraging people to enjoy these vistas. They may help the local economy, but not sure.
2. What role does your organization play, if any, in the *River of Lakes Heritage Corridor Scenic Highway* byway organization?
 - A council member here is a member of the CAG group. They meet as a board to govern the scenic highway. He reports on each meeting. They've been incorporated into a funding project. They were awarded a certain amount of money.
3. What are some ways that the *River of Lakes Heritage Corridor Scenic Highway* affects your particular community?
 - It brings visitors off I-4. Notable attraction is Blue Springs.
4. How would you describe a **typical tourist** visiting the region?
 - No data to say. Anecdotal, most are Floridians on day trips.
5. And, how would you describe a **typical Byway visitor**?
 - The same as above.
6. How do most folks in your area find out about the Byway?
 - We have a nice pamphlet found in visitor centers. Visitors, however, seem more likely to get internet or newspaper information. Local residents hear about this through word of mouth.
7. How much of an economic impact does the *River of Lakes Heritage Corridor Scenic Highway* have on your community?
 - No idea. Probably improves local economy. Most visitors are in-state day trippers.
8. What could be done by the ROLHC byway organization to help strengthen the local economy? Are improvements or promotions needed to increase awareness or visitation?
 - We need organized events by ROLHC. Bike trips, for example. We have excellent bike trails.
9. Are there any other recent visitor impact studies for your community that we should be aware of as we proceed?
 - Don't know of any.
10. Would you please suggest some events, attractions, and locations along the ROLHC that would provide a good opportunity to conduct these interviews in your community?
 - Events: Orange City events, Halloween and Christmas Festival. First Sunday of every month in Barberville is the Pioneer Settlement for the Arts. In February, the Manatee Festival takes place, from Valentine Park to Blue Springs. Jeff Alaback runs the Manatee Fest. There's also Blue Springs, De Leon Springs, and downtown DeLand events. Blue Grass Festival in September and October.
11. Finally, do you have any additional comments regarding the *River of Lakes Heritage Corridor Scenic Highway* or suggestions to guide us as we implement this research?
 - None.

Main Street DeLand

1. How would you describe the Florida Scenic Highway Program and what it does in the state?
 - It's a good thing. I know about most of them. They promote the highway sites, though I don't have numbers on exactly how much they help the economy.
2. What role does your organization play, if any, in the *River of Lakes Heritage Corridor Scenic Highway* byway organization?
 - I sit on the board, and we link websites to the corridor.
3. What are some ways that the *River of Lakes Heritage Corridor Scenic Highway* affects your particular community?
 - Don't know how much I can attribute to them, but eco-tourism is growing.
4. How would you describe a **typical tourist** visiting the region?
 - Not sure, we get day trippers mostly. I have no knowledge of how many foreign or other state travelers come by. Age range is probably 45 and up.
5. And, how would you describe a **typical Byway visitor**?
 - Day trippers, mostly.
6. How do most folks in your area find out about the Byway?
 - No demographics, but there are a lot of brochures going out. Local people tend to know through word of mouth. There are plenty of brochures in kiosks and offices. Social media, I'm sure, plays a significant role.
7. How much of an economic impact does the *River of Lakes Heritage Corridor Scenic Highway* have on your community?
 - Can't say for sure, but Blue Springs and De Leon Springs are being promoted. I know it's helped the community, but I don't have the figures. Most people seem to like it. River of Lakes does a good job connecting most people and places. However, most people are not aware of it.
8. What could be done by the ROLHC byway organization to help strengthen the local economy? Are improvements or promotions needed to increase awareness or visitation?
 - They do the best they can do with the current funding. They have plenty of signs with descriptions.
9. Are there any other recent visitor impact studies for your community that we should be aware of as we proceed?
 - Tourism office has more current information.
10. Would you please suggest some events, attractions, and locations along the ROLHC that would provide a good opportunity to conduct these interviews in your community?
 - End of September Craft Show in De Land, 28th until 29th. Motorcycle rally around March 9th; 50,000 people expected. De Leon Springs and Blue Springs are active year-round.
11. Finally, do you have any additional comments regarding the *River of Lakes Heritage Corridor Scenic Highway* or suggestions to guide us as we implement this research?
 - Not really. You'll find what you'll find. I'm on a variety of boards and ROLHC is one of the better ones.

Focus Group: Brief Summary

Background Experiences/Participation

The focus group participants viewed the Byway as a unifying factor in the region. The participants, however, also viewed the Byway from their own unique perspectives. These perspectives included a representative of the Zoo, an elected city official, and a resident from a community that is working to revitalize after years of decline. While the most recent months have obviously diminished the number of Byway visitors, all believed that the Byway contributed to increasing the awareness of the resources in the region and enhancing businesses and revenue.

A frequently used description of the region is one that promotes “eco-tourism” with the springs and other natural features of the area surrounding the Byway.

Byway Visitors

Participants had difficulty categorizing visitors to the Byway. In general, they said, visitors tended to be from relatively close locations in Florida, such as The Villages. Participants described the typical visitor as older and making repeated visits. These visitors may come to attend a specific event or attraction but then may become aware of and visit other locations along the Byway.

In addition to visitors who reside in Florida relatively close to the Byway, the participants noted that they also get visitors from somewhat more distant Florida locations—such as South Florida, including Dade and Broward counties.

The participants also noted that the Byway gets visitors from more faraway locations in the US, particularly the Northeast. They explained, interestingly, that visitors come from various European nations, as well. Group members noted the Byway region is, for example, a destination for skydivers. In addition, they explained, many horse breeders and owners from around the nation come to the Byway to train their horses in the warmer Florida weather. There is also a mountain biking facility that widely attracts users, per the discussion, and Stetson University has enhanced its football program and plays teams from around the US.

Discussants noted that most visitors drive to the Byway in their automobiles, but, even then, many bring bicycles or kayaks on their vehicles that they can use to enjoy biking trails or waterways.

The peak period of visitation to the Byway is during the months of October through March, according to focus group members.

The participants stressed the Byway brochure as an important tool for increasing awareness of the various attractions, destinations, and events in the area. Members said the demand for the brochure is very high and, in fact, a new printing is needed because the current supply has been exhausted. The brochure is widely distributed at Florida Welcome Centers and the Daytona Beach International Airport. The Daytona Beach International Airport, per participants, also has a video screen that provides information on the attractions and locations along the Byway.

Focus group members noted that signs provide some information about the Byway, but their concern is to have enough signs to provide needed information without overwhelming visitors. Signs are an expensive way to advertise, however, so social media is used, said participants. They also indicated that

social media could and should be expanded to increase awareness of the attractions associated with the Byway.

There was an interesting discussion amongst the group about designating the Byway and surrounding areas as a tourist location. All participants noted that tourists, and the revenue they bring, are important to the economic wellbeing of the Byway and its residents. There was some implicit concern from discussants, though, that too many tourists could negatively affect the history and environmental beauty of the area.

Final Thoughts on the Byway

The participants provided a wide variety of concluding thoughts about issues regarding the Byway. One interesting discussion related to attracting visitors to the area in these challenging circumstances, as a contrast to the massive theme parks, providing an opportunity for folks who are tired of “sheltering in place” and welcome a visit to an outdoor location that is sufficiently large to facilitate social distancing.

The focus group participants provided a lively and informative discussion of various aspects of the Byway for the full two hours that it lasted.

Appendix G: ROLHC Story

River of Lakes Heritage Corridor Story

The Native Americans of the area, the Timucua, referred to the **St. Johns River as the “Welaka”, which meant “River of Lakes.”** The St. Johns River and the series of lakes it connects were the lifeline and the roadway for centuries of inhabitants, settlers, travelers and tourists. From the Timucua, to the early Spanish and English settlers and plantation owners, to Civil War supply lines and the 1800s Steamboat Era, the **River of Lakes** provided the passageway, the supply line, and the source of life.

Today, the River of Lakes Heritage Corridor is a Florida Scenic Byway which connects travelers to the numerous cities, towns, historic and cultural sites in this history-rich area. The River of Lakes Heritage Corridor embodies a unique blend of sophisticated contemporary culture, rich historic preservation, and gorgeous natural Florida. The charm of this area has drawn many new developments in recent decades, with four-star restaurants and regal art galleries thriving alongside good old barbeque and antique architecture. Spanish moss hangs over the flooded sidewalks during the many festivals and concerts. You are never too far away from nature along this byway – and many locals have their bikes and kayaks at the ready.

Place names such as Deland, Sanford, Lake Helen, Debary, and Stetson University are traced back to the wealthy investors who fell in love with the area and invested in it. These visionaries established the first industry, agriculture and educational institutions that anchor the area.

There is more to Florida than beaches and theme parks. River of Lakes Heritage Corridor is the place to find out what you have been missing, whether you are planning to visit Florida from across the globe or call Florida home.

Appendix H: Highway Improvements in Seminole & Volusia Counties, Florida (July 2020)

Volusia & Seminole Counties **Current** FDOT Construction Projects Pertinent to ROLHC

County	Number	Description	Amount (\$)
Seminole	240196-1-56-01	City of Sanford (Water Main & Force Main)	55.5 million
Seminole	240196-1-56-02	City of Sanford (6" Force Main around Exfiltration System)	
Volusia	437842-1	Adaptive signal Control System on US 17-92 from Monroe Road to Minnesota Ave.	2.0 million
Volusia	444338-1	SR 15/SR 600/ US 17/92 FROM PLANTATION RD TO Highbanks Road	227k
Volusia	442467-1	US 17-92 at Fort Florida Road Signalization	609k
Volusia	992000-3	SunRail Safety Enhancements-Dynamic Envelope Construction	
Seminole	439682-5	I4/SR 400 from SR 46 to east of SR 600 (US17/92) (eastbound only)	232.8 million
Volusia	442428-5	VOLUSIA COUNTY PEDESTRIAN LIGHTING BUNDLE	200k
Volusia	445716-1	US 17 FROM SR 15A TO PONCE DE LEON BLVD	4 million
Seminole	240200-3	SR 46 (Wekiva Parkway) from Orange Blvd to Wayside Drive-Oregon Street (Section 7B)	17.8 million

Volusia & Seminole **Future** FDOT Construction Projects Pertinent to ROLHC

County	Number	Description	Amount (\$)
Volusia	240836-1	SR 40 from SR 15/US 17 to west of SR 11	35 million
Volusia	242592-4	1-4 from east of SR 434 to east of US 17/92 (Seminole/Volusia County line) This project is a segment of I-4 Ultimate extensions (Beyond I-4 Ultimate) known as Segment 3.	58 million
Volusia	408464-2	1-4 from east of US 17/92 to east of SR 472	667 million
Volusia	410251-1	15 (US 17) from De Leon Springs Blvd to SR 40	46 million
Volusia	434411-1	SR 400 (I-4) from west of CR 4139 to SR 44	11.3 million
Volusia	431922-1	SR 44 at Kepler Rd intersection improvements	3.45 million
Volusia	437133-1	US 17-92 from Mandarin Ave to north of E Kentucky Ave	1.2 million
Volusia	438968-2	SR 15A (Taylor Rd) from US 17-92 of SR 15	1.2 million
Volusia	441396-1	CR 4164 (Osteen-Maytown Rd) from east of Gobblers Lodge Rd to east of I-95	1.4 million
Volusia	441414-1	SR 15A from US 17-92 to Adelle Ave	1.3 million
Volusia	443433-1	SR 600 from N Alabama Ave to East of CR 4101/N Kepler Rd	5.5 million

Volusia	446159-1	Wrong Way Driving Signs Bundle A	1.7 million
Seminole	242592-4	I-4 from east of SR 434 to east of US 17/92 (Seminole/Volusia County Line)	36 million

Volusia & Seminole Counties **Current** County Construction Projects Pertinent to ROLHC

County	Number	Description	Amount (\$)
Seminole	00187718	RIVERWALK SIDEWALK TRAIL CITY OF SANFORD LEAD	12 million
Seminole	01785350	CELERY/MELLONVILLE TRAIL (LAKE MONROE LOOP)	2.2 million
Seminole	00187765	LAKE MONROE LOOP TRAIL PROJECT	500K
Volusia	441396-1	CR 4164 OSTEEN-MAYTOWN RD FROM E OF GOBBLERS LOGDE RD TO E I-95	1.6 million

Volusia & Seminole **Future** County Construction Projects Pertinent to ROLHC

County	Number	Description	Amount (\$)
Seminole	444628-1	LAKE MONROE LOOP TRAIL PROJECT	2.7 million