



# ORLANDO'S **RIGHT**RAIL

KEY POINTS SUPPORTING THE SR 528 ROUTE



## **EXHIBIT 1**

2015

**U.S. Department of Transportation  
Federal Railroad Administration**

**Record of Decision/Section 4(f) Determination**

***FLORIDA HIGH SPEED RAIL***

***Tampa to Orlando***

***Hillsborough, Polk, Osceola and Orange Counties, Florida***

**Financial Project ID No.: 411253 1 94 03  
Federal Aid Project No.: N/A**

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## **1. SUMMARY**

This document records the decision of the Federal Railroad Administration (FRA) regarding the Florida High Speed Rail Project from Tampa to Orlando proposed by the Florida Department of Transportation (FDOT). In making this decision, the agency considered the information, analysis and public comments contained in the 2005 Final Environmental Impact Statement (FEIS) and the more recent 2009 FEIS Reevaluation (2009) to determine the alignment location and station sites for further project development into design and construction. Additional coordination between FDOT, FRA and the Federal Highway Administration (FHWA) will be carried out in the design phase with respect to emergency and maintenance access, safety and security in accordance with FRA standards through the development of a Safety Plan.

This Record of Decision (ROD) has been drafted in accordance with the regulations implementing the National Environmental Policy Act (NEPA) (40 CFR Part 1505.2) and FRA's Procedures for Considering Environmental Impacts (64 Fed Reg 28545 (May 26, 1999)). Specifically, this ROD:

- Provides a background of the NEPA process for the Final Environmental Impact Statement (FEIS) and the 2009 FEIS Reevaluation
- States and reaffirms the Purpose and Need
- Presents the alternatives considered in the 2005 FEIS
- Presents the alternatives considered and dismissed in the 2005 FEIS
- Identifies the selection of the preferred alternative for the 2005 FEIS
- Identifies the environmentally preferable alternative
- Presents the Affected Environment summarizing the findings of the 2009 FEIS Reevaluation
- Presents means to avoid and minimize environmental harm
- Presents the FRA Decision, determinations and findings
- Provides a summary of the public involvement and agency coordination for the 2005 FEIS and the 2009 FEIS Reevaluation



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FDOT proposes the high speed passenger rail system would operate 16 intercity round trips per day with additional frequent shuttle service from OIA to the tourist destinations in the Orlando area. The maximum travel time will be 64 minutes with stops between Tampa and Orlando. The maximum operating speed will be 168 mph.

The initial environmental document was completed under the direction of the Florida High Speed Rail Authority (FHSRA), which was under a state constitutional mandated directive to expedite the implementation of the system. In order to complete the project in a timely manner, FHSRA selected a Design, Build, Operate, Maintain, and Finance (DBOM&F) process for implementing the project. Proposals were solicited and two were selected for evaluation in the FEIS published in 2005. The 2009 FEIS Reevaluation builds on the use of a DBOM&F process for advancing the project.

On October 2, 2009, FDOT submitted an application to the FRA under the High Speed Intercity Passenger Rail Program (HSIPR) for \$2.624B to fund the development of the Tampa-Orlando high speed rail corridor project. On January 28, 2010, FRA announced that FDOT had been selected for an award of up to \$1.25B for the Tampa-Orlando corridor. The funds will be used to complete any additional corridor level analysis respective to station sites, complete final design, and initiate construction of the FHSR project from Tampa to Orlando.

### 3. BACKGROUND

Following its creation in 2001, the FHSRA, with guidance from the FRA as the lead federal agency, took a number of steps to implement high speed rail within the state of Florida. The FHSRA began the planning, environmental studies, and engineering needed to prepare a Draft Environmental Impact Statement (DEIS) for the Tampa to Orlando corridor in 2002, focused on independent utility and logical termini. FRA approved the DEIS in August 2003, and signed and circulated the FEIS in 2005. However, due to the project being suspended, the FRA never issued a Record of Decision (ROD) for the project.

The major NEPA milestones are summarized in **Table 1**.

**Table 1: Summary of Major NEPA Milestones**

Milestone	Date
Notice of Intent	March 2002
Advance Notification and Scoping	April 2002
Draft EIS Signed and Circulated	August 2003
Draft EIS Notice of Availability	September 5, 2003
Public Hearings	October 7-9, 2003
FEIS Signed and Circulated	July 2005
FEIS Notice of Availability	August 5, 2005
<small>Source: Florida High Speed Rail Tampa to Orlando FEIS Reevaluation, October, 2009</small>	

Independent documentation in support of the findings of the 2005 FEIS includes:

- The *Tampa Interstate Study Environmental Impact Statement*, November 1996 - which includes ultimate improvements to I-4/I-275 that accommodate the high speed rail alignment
- The *Intermodal Station at Orlando International Airport Environmental Assessment*, September 2005 – planned an intermodal station at both the OIA North Terminal and the future OIA South Terminal, and updated the HSR and light rail alignments through OIA property
- The *Greater Orlando Aviation Authority Master Plan*, August 2004 – most current master plan incorporating multimodal station at the North Terminal, future South Terminal, and HSR rail alignments
- The *Tampa Bay Intermodal Center*, October 2005 – multimodal station site study consistent with the location of the Tampa HSR station area that provided for the FHSR alignment
- The *Canadian Court Intermodal Transportation Center Study*, April 2007 - multimodal station site consistent with the proposed Orange County Convention Center station that accommodates the FHSR alignment

### **3.1. FEIS REEVALUATION**

In October 2008, a federal program to advance high speed rail corridor development was authorized under Section 501 of the Passenger Rail Investment and Improvement Act of 2008 (PRIIA). The *America Recovery & Reinvestment Act of 2009* (ARRA) then made \$8 billion available for High Speed Rail (HSR). In April 2009, President Barack Obama's Administration unveiled its HSR Vision, initially highlighting federally-designated high speed rail corridors, including Tampa-Orlando-Miami in Florida. This began a national competition for federal funding.

Given this new prospect for federal funding, the Florida Department of Transportation (FDOT) began work to determine the extent of changes in potential environmental impacts and commitments since the FEIS was circulated in 2005.

FRA met with FDOT representatives on June 12, 2009 to discuss the project and the status of the NEPA documentation. FRA determined that a reevaluation of the 2005 FEIS was needed to satisfy NEPA requirements (the FEIS Reevaluation). This reevaluation was prepared in conformance with FDOT's Project Development and Environment (PD&E) Manual.

While there have been no major changes to the project location and design since the FEIS was published, several years have elapsed since publication of the FEIS, triggering the need for a reevaluation. According to FRA's Procedures for Considering Environmental Impacts (64 FR 28545 (May 26, 1999)) and FDOT's PD&E Manual, reevaluations are to be conducted under the following circumstances:

- Approval of document and authorization of the next phase is greater than one year
- A major change in the project's location or design has occurred
- If more than three (3) years have lapsed since the date of approval of the final EIS without a decision

In May 2009, FDOT initiated a qualitative review of the project to determine the level of assessment required to complete the NEPA/PD&E process and support the issuance of a ROD. The findings of this assessment were summarized in a technical memorandum, *Basis for FEIS Reevaluation Technical Memorandum* (June 29, 2009), presented and discussed with FRA. This document is located as an appendix to the FEIS Reevaluation Report. The FEIS Reevaluation is in **Appendix A** of this ROD.

The qualitative assessment indicated that minor changes in the project definition are required and small changes in the affected environment have occurred, and that a reevaluation was an appropriate course of action to determine the potential changes in environmental impacts, mitigation and commitments since the FEIS was published in 2005. Accordingly, the reevaluation focused on the following:

- Changes in the preferred technology from the gas turbine-powered technology as identified in the 2005 FEIS to the electric powered technology. Under the FEIS Reevaluation, the electric-powered technology has emerged as the preferred technology, on the same alignment, based on the current initiatives to reduce carbon emissions and dependency on foreign oil

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- Design changes needed based on surrounding infrastructure and right-of-way
- Changes in the affected environment that have occurred since the 2005 FEIS
- Changes in potential environmental impacts since the 2005 FEIS
- Changes in the mitigation and commitments compared to the 2005 FEIS
- Changes in permits needed since the 2005 FEIS
- Need for updated coordination with local jurisdictions, stakeholders, and environmental review agencies
- Need for updated public involvement
- Changes in laws, rules, and regulations since 2005

A draft FEIS Reevaluation was completed by FDOT and submitted to FRA on October 1, 2009.

## **4. PURPOSE AND NEED**

The Purpose and Need for the FHSR project was established in the 2005 FEIS and was confirmed by the 2009 Reevaluation. The purpose of FHSR is to enhance intercity passenger mobility in Florida by expanding passenger transportation capacity and providing an alternative to highway and air travel. Increased mobility is viewed as essential for the sustained economic growth of the region, as well as the quality of life of the region's residents and visitors. Presently, passenger mobility in the Tampa-Orlando corridor is provided primarily by highways, particularly I-4. Projected transportation demand and travel growth, as prompted by social demand and economic development and compared to existing and future roadway capacity, show a serious deficit in available capacity. In addition, increasing population, employment, and tourism rates continue to elevate travel demand in the study corridor.

Although capacity improvements to the interstate system along the corridor have either recently been completed or are planned for the near future, they are not adequate to accommodate future travel demand. This need is further emphasized by high traffic volumes, congestion, and accident rates in the study corridor. Further, social and economic demands will continue to call for provision of alternative transportation choices for those individuals who cannot or choose not to drive, as well as those travelers looking for alternatives to congested highways.

### **4.1. Florida Passenger Rail Legislation of 2009**

On December 16, 2009 Governor Charlie Crist signed legislation specifically to support the development of passenger rail systems in the state of Florida. This includes the creation of the Florida Rail Enterprise and other steps including potential funding support for a high speed rail system in the state. The passage of this legislation demonstrates Florida's commitment to work with Federal agencies and private sector partners to advance high speed rail and other passenger rail systems as an integral component of statewide transportation systems.

## 5. ALTERNATIVES

### 5.1. ALTERNATIVES CONSIDERED AND DISMISSED IN THE 2005 FEIS

The FHSRA considered several routes between Tampa and Orlando. In order to identify reasonable alternatives that could satisfy the identified project purpose and need, the FHSRA conducted a study to identify, quantify, and compare various HSR route locations. The results of the screening process are documented in the *Florida High Speed Rail Screening Report*, which was completed in October 2002. This evaluation was built on the studies undertaken for high speed rail in the Tampa – Orlando corridor since the mid 1980s. Forty-seven alignments were reduced to 20 as a result of this evaluation. **Figure 2** identifies the various segments that were eliminated from continued study and the retained alignments that were analyzed as the viable alternatives in the 2005 FEIS.

**Tampa area:** The FHSR study team developed 21 alignments to connect the downtown Tampa station eastward to I-75 with alignments in the I-4 and CSX rail corridors. Ten alignments were eliminated for reasons including engineering constraints, disruption of access to low-income housing and community facilities, disruption of the Ybor City National Historic Landmark District (NHL), and causing relatively greater environmental impacts than retained alignments.

**Hillsborough County:** Two alignments were evaluated in rural Hillsborough County: one along the I-4 corridor and the other parallel to the CSX rail line. The CSX rail alignment was eliminated from further consideration due to proximity impacts to a significant number of community facilities in Plant City along the railroad.

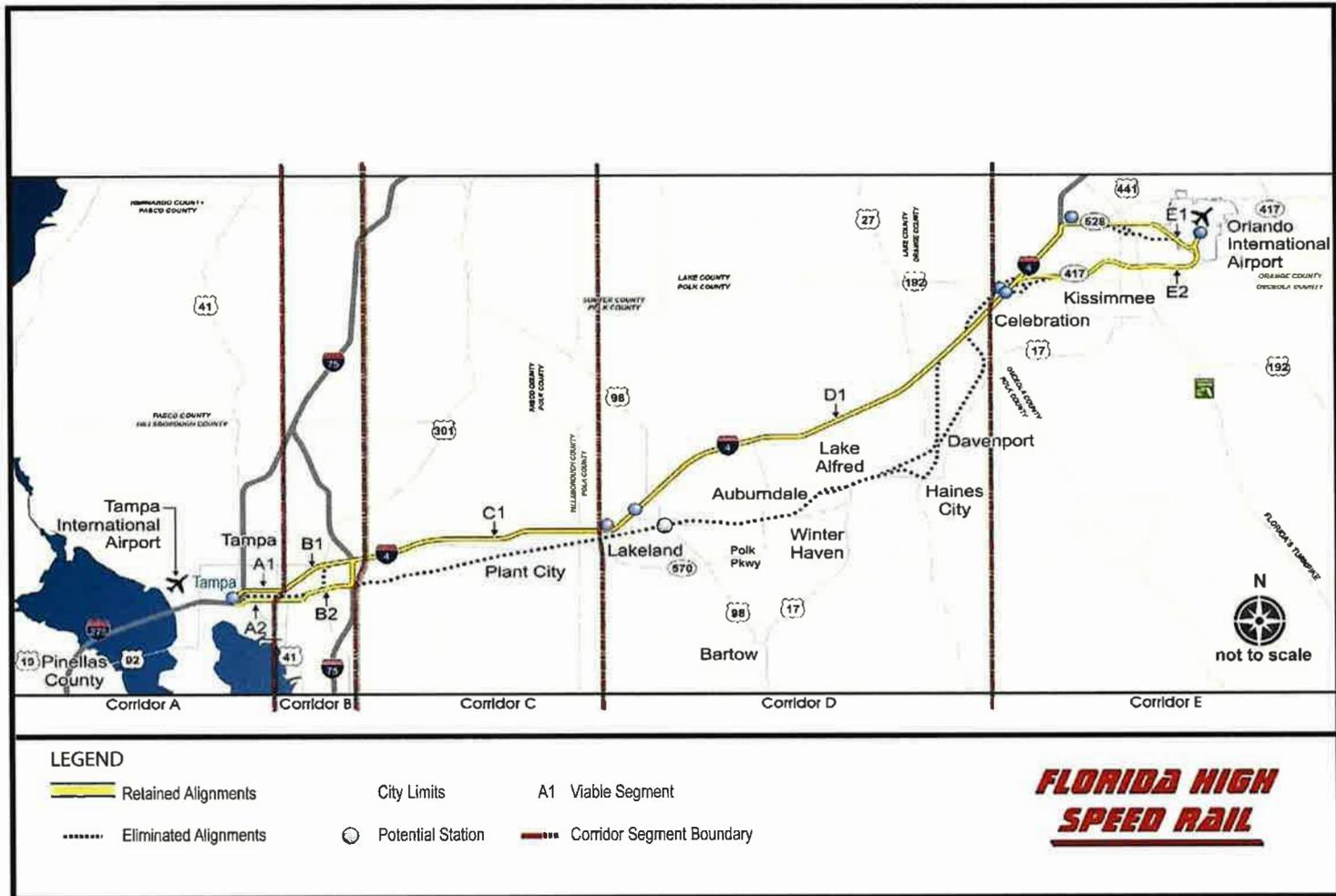
**Polk County:** Nine alignments were evaluated in Polk County. The alignments included the I-4 and CSX rail corridors, as well as connections between the two corridors. The CSX corridor was eliminated due to proximity impacts to community facilities in Lakeland, Auburndale, Haines City, and Davenport. With the elimination of the CSX alignment, connecting alignments to the I-4 corridor were no longer viable.

**Orlando area:** Fifteen alignments were evaluated in Osceola and Orange counties in the Orlando area. Seven alignments were eliminated. Some of the alignments connected to eliminated alignments in Polk County and would have disrupted existing commercial development along the alignment. A new terrain connection between I-4 and the Central Florida Greenway (S.R. 417) had the greatest amount of potential wetland and wildlife habitat impact and limited access to alternative station sites. Other alignments were eliminated due to engineering constraints.

### 5.2. ALTERNATIVES CONSIDERED IN THE 2005 FEIS

The alternatives selected for evaluation in the EIS include:

- No-Build Alternative, consisting of no FHSR service between Tampa and Orlando.
- Two technology alternatives, the gas-turbine powered locomotive-hauled and the electric-powered locomotive-hauled trains, reflecting the responsive proposals to the FHSRA DBOM&F solicitation. These technologies are further described below.



Source: Florida High Speed Rail Tampa to Orlando Final Environmental Impact Statement, May 2005.

Figure 2: Corridors / Stations Considered

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- Four alignment alternatives per each technology, or a total of eight design/build alternatives. A detailed summary of each alignment is available in the 2005 FEIS.

Each Alternative carried forward for consideration in the 2005 FEIS is summarized below.

### 5.2.1. No-Build Alternative

The No-Build Alternative assumes that a FHSR system would not be built between Tampa and Orlando. Passenger service between the two cities would instead consist of various existing bus services between Tampa and Orlando and automobile use on I-4, I-75, the Bee Line Expressway (S.R. 528), and the Central Florida Greenway (S.R. 417). The No-Build Alternative assumes that certain planned and funded highway improvements would be undertaken between Tampa and Orlando.

The No-Build Alternative does not envision providing an alternative transportation mode between Tampa and Orlando for daily commuters, visitors, and residents of the area, and existing modes would have to satisfy all travel demand. The potential of the FHSR project to improve public transportation and increase the efficient use of the transportation system, both intercity and locally, would not be realized.

### 5.2.2. Technology Alternatives

The FHSRA determined that two proposals were responsive to its solicitation for DBOM&F proposals. These represented different technologies with different track systems, rail locations, maintenance facilities and station sites.

Fluor Bombardier proposed a gas turbine-powered locomotive-hauled train technology, developed by Bombardier and FRA with the trademark name of “Jet Train”. The gas turbine train has passenger equipment similar to Amtrak’s Acela Express trains presently operating between Washington, D.C. and Boston, Massachusetts.

The Global Rail Consortium (GRC) proposed using an electric-powered locomotive-hauled train technology, powered from an overhead catenary system similar to that in use on the Acela system and the electric train uses the French designed TGV Atlantique train sets.

Table 2 summarizes the operating features of the two proposed technologies.

**Table 2: Summary of Operations by Technology**

Feature (FHSRA minimums)	Gas Turbine Train	Electric Train
Speed (120 mph)	<i>125 mph</i>	<i>160 mph</i>
Round trips per day (12)	<i>14</i>	<i>16</i>
Shuttle trips between Orlando International Airport and Disney (not required)	<i>8</i>	<i>17</i>
Trip time (1 hour, 10 minutes)	<i>65–70 minutes</i>	<i>54–55 minutes</i>
Seating capacity (250)	<i>292</i>	<i>250</i>

Source: Florida High Speed Rail Tampa to Orlando Final Environmental Impact Statement, May, 2005.

### 5.2.3. Alignment Alternatives

The alignment alternatives used varying combinations of the I-275 and CSX corridors in downtown Tampa, the I-4 corridor between Tampa and Orlando, and either the Bee Line

Expressway (S.R. 528) or Central Florida Greenway (S.R. 417) corridor in Orlando. Design/Build Alternatives 1 through 4 consist of gas turbine technology, while Design/Build Alternatives 5 through 8 consists of the electric train technology.

The eight alternatives use varying combinations of the same alignment. The alignments associated with each alternative are illustrated in **Figure 3** and briefly summarized as follows:

**Tampa area: I-275/I-4 corridor** – This is a new, grade-separated alignment that runs south of and parallel to I-275 and I-4 to approximately 14th/15th Streets where the alignment crosses into the I-4 median.

**Tampa area: CSX “S” line/CSX “A” line/I-75** – This is a new, grade-separated alignment that leaves the downtown station southeasterly through a commercial area to connect into the former CSX “S” line. The alignment runs eastward to connect to the existing CSX “A” line, running along the north side of the rail line to I-75. At I-75, the alignment runs in the interstate median northward to connect into the I-4 median.

**Between I-75 to the Osceola/Orange county line: I-4** – This alignment between the Tampa and Orlando urban areas would use the I-4 median for the entire length.

**Orlando area: Bee Line Expressway (S.R. 528)/Taft-Vineland Road** – This grade-separated alignment would leave the I-4 median and follow along the north side of the Bee Line Expressway (S.R. 528), then along the median of Taft-Vineland Road, crossing new ROW to connect into a station at Orlando International Airport.

**Orlando area: S.R. 536/Central Florida Greenway (S.R. 417)** – This grade-separated alignment leaves the I-4 median to run along the south side of S.R. 536, connecting to either the north side or the median of the Central Florida Greenway (S.R. 417). From the Central Florida Greenway (S.R. 417), the alignment would run along the east side of the South Access Road to a station at Orlando International Airport.

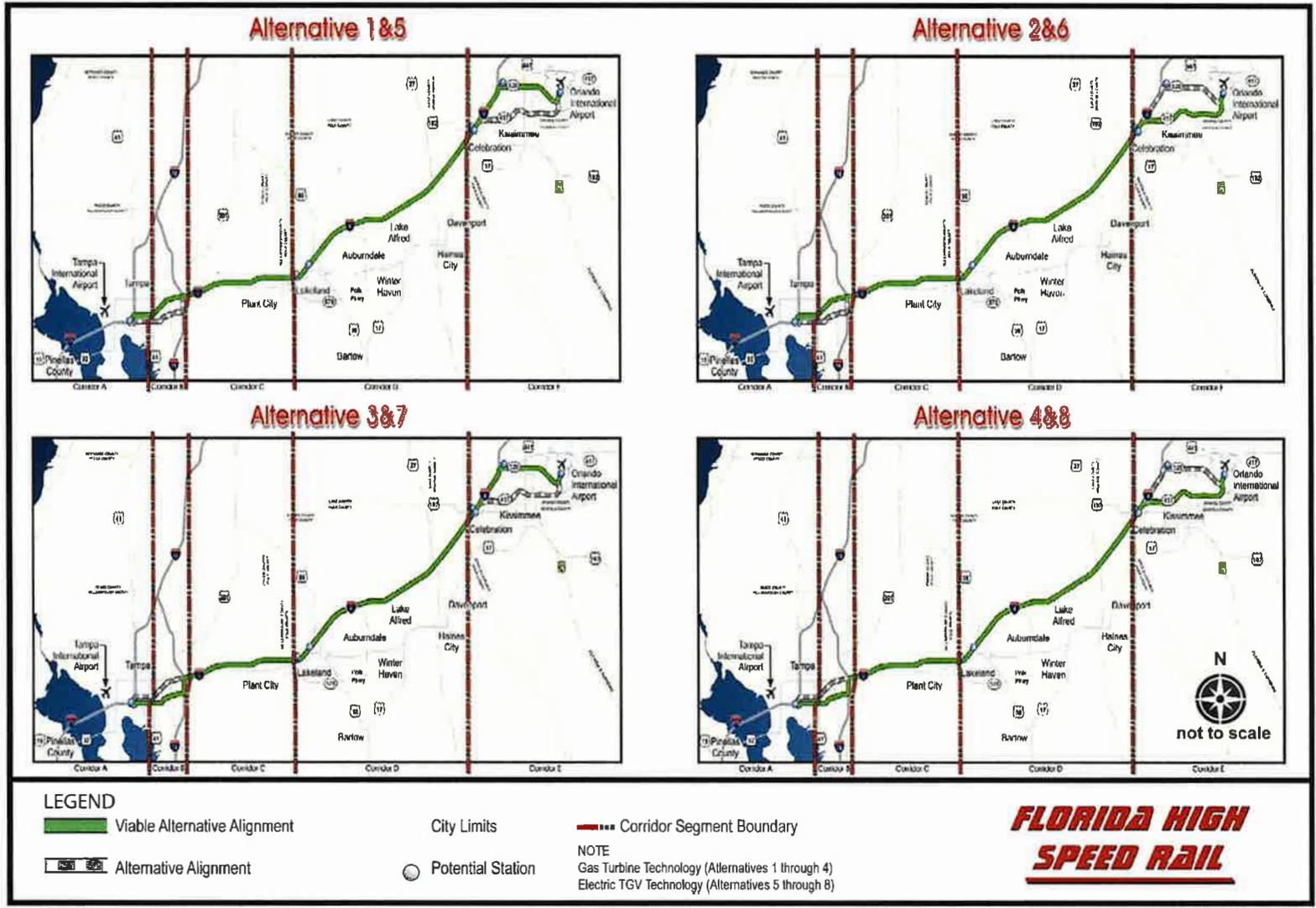
Station locations evaluated in the study included:

- Tampa Central Business District (CBD), south of Interstate 275 (I-275)
- I-4/Polk Parkway, west entry
- I-4/Kathleen Road (S.R. 539) in the City of Lakeland
- I-4 near Walt Disney World
- I-4 near Orange County Convention Center (OCCC)/Multi-Modal Station
- Orlando International Airport

An operation and maintenance (O&M) facility is proposed at one of two locations near the Orlando International Airport.

#### **5.2.4. Summary of Alternatives Identified**

The FEIS thus evaluated a total of eight design/build alternatives consisting of four different alignment options with two different technologies, as offered by the two proposers. **Figure 3** displays the eight design/build alternatives and the station locations considered. **Table 3** provides a summary of the design/build alternatives by alignment and technology.



Source: Florida High Speed Rail Tampa to Orlando Final Environmental Impact Statement, May 2005

Figure 3: Design Build Alternatives

**Table 3: Summary of Design/Build Alternatives by Alignment and Technology**

	Alternative							
	1	2	3	4	5	6	7	8
<b>TECHNOLOGY</b>								
Gas turbine	X	X	X	X				
Electric train					X	X	X	X
<b>ALIGNMENT</b>								
I-275/I-4 in Tampa	X	X			X	X		
CSX Line/I-75 in Tampa			X	X			X	X
I-4 between Tampa & Orlando	X	X	X	X	X	X	X	X
SR 528/Taft-Vineland Road in Orlando	X		X		X		X	
S.R. 536/SR 417 in Orlando		X		X		X		X

*Source: Florida High Speed Rail Tampa to Orlando Final Environmental Impact Statement May 2005.*

The evaluation matrix in **Table 4** summarizes the quantifiable impacts of the proposed FHSR Design/Build Alternatives 1 through 8. The matrix provides an assessment of potential impacts for each alternative, providing the opportunity to effectively evaluate the consequences of each alternative.

Design/Build Alternatives 1 through 4 represent the four alignment combinations with the gas turbine technology. Design/Build Alternatives 5 through 8 represent the four alignment combinations with the electric train technology. The potential impacts for the FEIS Preferred Alternative, Design/Build Alternative 1, are highlighted in **Table 4**.

Physical impacts, such as wetland, wildlife, and floodplain impacts are technology neutral. The differences in impacts are due to alignment location, station sites, and O&M facility sites. In general, there are slightly more natural impacts associated with the Central Florida Greenway (S.R. 417) alignment due to crossing relatively undisturbed land. Noise, vibration, air quality, and energy impacts are more associated with the technology. In some cases though, the technology and alignment combinations will have varying effect such as with noise and vibration.

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**Table 4: Design/Build Alternatives Evaluation Matrix  
(2005 FEIS Preferred Alternative Highlighted)**

	Alternatives							
	1	2	3	4	5	6	7	8
<b>NATURAL ENVIRONMENT IMPACTS (AC.)</b>								
Total Wetland Impacts (AC.)	40	31.3	39.2	30.5	25.6	24.4	30.5	23.6
High Quality Wetlands (AC.)	11	2	11	2	11	2	11	2
Protected Species Sites	9	15	10	16	9	15	10	16
<b>FLOODPLAIN AND FLOODWAY (AC.)</b>								
Base Floodplain Encroachment	56.88	54.54	61.04	58.70	56.88	54.54	61.04	58.70
Base Floodway Encroachment	9.45	6.47	9.45	6.47	9.45	6.47	9.45	6.47
<b>CONTAMINATION SITES (RANKED H)</b>								
Potential Petroleum Sites	2	0	7	5	2	0	7	5
Potential Hazardous Materials Sites	5	5	12	12	5	5	12	12
<b>SECTION 4(f) IMPACTS</b>								
Recreation Facilities	1	1	0	0	1	1	0	0
Historic/Archaeological Sites	0	0	2	2	0	0	2	2
<b>COMMUNITY SERVICES</b>								
Schools	8	12	5	9	8	12	5	9
Community Facilities	10	9	6	5	10	9	6	5
Parks & Recreation	5	7	5	6	5	7	5	6
Cemeteries	4	6	6	6	4	6	6	6
Churches	15	16	12	13	15	16	12	13
<b>NOISE IMPACTS (MODERATE &amp; SEVERE)</b>								
Category 1 (Buildings and/or parks)	0	0	0	0	0	0	0	0
Category 2 (Residences, hospitals, and hotels)	15	5	16	6	53	105	38	90
Category 3 (Institutional - schools, libraries, churches, active park)	0	0	0	0	1	2	0	1
<b>VIBRATION IMPACTS</b>								
Category 1 (Buildings and/or parks)	1	0	1	0	1	0	1	0
Category 2 (Residences, hospitals, and hotels)	44	20	40	16	13	5	9	1
Category 3 (Institutional - schools, libraries, churches, active park)	0	0	0	0	0	0	0	0
<b>AIR QUALITY EMISSIONS (Net Change in Tons/Year)</b>								
CO	-101.7	-64.7	-100.9	-63.8	-152.0	-114.3	-151.8	-114.1
NOX	+189.0	+188.2	+191.4	+190.6	+23.3	+24.1	+23.7	+24.5
VOC	+8.9	+10.6	+9.2	+10.9	-8.1	-6.1	-8.1	-6.1
<b>ENERGY CONSUMPTION (Change from 2010 No-Build)</b>								
Millions BTU	498,855	507,770	505,658	514,574	239,820	243,623	243,314	247,124
<b>SECTION 106 IMPACTS</b>								
Historic Sites	5	5	7	7	5	5	7	7
Archaeological Sites	0	0	0	0	0	0	0	0
<b>RELOCATIONS</b>								
Residential	3	3	0	0	3	3	0	0
Business	3	8	15	23	3	8	15	23
<b>COST</b>								
ROW (Non-public)	\$118M	\$149M	\$150M	\$181M	\$101M	\$128M	\$134M	\$161M
Infrastructure	\$1,900M	\$2,033M	\$1,881M	\$2,015M	\$2,177M	\$2,306M	\$2,154M	\$2,284M
Mitigation	\$30M							
<b>TOTAL COST</b>	<b>\$2.048B</b>	<b>\$2.212B</b>	<b>\$2.061B</b>	<b>\$2.226B</b>	<b>\$2.308B</b>	<b>\$2.464B</b>	<b>\$2.318B</b>	<b>\$2.476B</b>

Source: Florida High Speed Rail Tampa to Orlando Final Environmental Impact Statement, May, 2005.

### **5.3. 2005 FEIS PREFERRED ALTERNATIVE**

The 2005 FHSR FEIS resulting from the Project Development and Environment (PD&E) Study investigated the eight design/build alternatives, evaluating not only the technological differences, but also engineering, environmental impacts, costs, and other factors impacting the selection of the alignment. Development of alignments provided an analysis of socio-economic, natural, and physical environmental impacts within the proposed corridors. The potential impacts of the design/build alternatives and the No-Build Alternative are documented in Section 4 of the FEIS.

The FHSRA considered the alternatives in Tampa and Orlando in identifying a Preferred Alternative. All alternative alignments are located along I-4 through Polk and Osceola counties. Two separate alignments were considered in Tampa (Hillsborough County): the CSX and I-4 alignments. Similarly, two alternatives were considered in Orlando (Orange County): the Florida Turnpike's Bee Line Expressway (S.R. 528) and the Central Florida Greenway (S.R. 417) alignments.

The FHSRA unanimously passed a motion identifying the I-4 alignment in Hillsborough County as the preferred alignment. Additionally, the FHSRA ranked the Fluor Bombardier Team (gas turbine technology) as the preferred proposer.

On October 27, 2003, the FHSRA originally identified the Central Florida Greenway (S.R. 417) alignment as the preferred alignment in Orange County. The vote was subject to the following two condition Memorandums of Agreement (MOA):

- Subject to an acceptable agreement between the FHSRA and Walt Disney Company related to donation of ROW and commitments to support ridership for the project.
- Subject to an acceptable agreement between the FHSRA and OOCEA related to use of the Central Florida Greenway (S.R. 417) ROW.

On November 10, 2004, the FHSRA revised the recommendation of the Preferred Alternative because the two conditional MOAs had not been executed. With this action, the FHSRA recommended Alternative 1 (gas turbine technology), which is the combination of the I-4 alignment in Hillsborough County and the Bee Line (now the Beachline) Expressway (S.R. 528) alignment in Orange County, as the Preferred Alternative. While the FEIS environmental analysis provided for either technology to be selected as the preferred technology to be used on the corridor, the FEIS identified Alternative 1 as the Preferred Alternative. The FEIS identified the No Build Alternative as the environmentally preferable alternative because it would result in less direct and indirect impact to the environment. However, the FEIS also noted that the No Build Alternative would fail to meet the Project purpose and need.

### **5.4. 2009 FEIS REEVALUATION PREFERRED ALTERNATIVE**

In the 2005 FEIS gas turbine-powered technology was selected as the Preferred Alternative. FDOT now prefers the electric-powered technology on the same alignment, based on the current initiatives to reduce carbon emissions and dependency on foreign oil. The 2009 FEIS Reevaluation addresses environmental impacts resulting from the change in the preferred technology, any changes to existing conditions and the minor changes to the 2005 Preferred Alternative alignment to further reduce the potential for environmental impacts.

The FHSR Preferred Alternative resulting from both the 2005 FEIS and 2009 Reevaluation would begin at the downtown Tampa station to be located between Tampa Street and Marion Street, I-275, and Fortune Street. The FHSR alignment would follow I-275 along the south and east right-of-way (ROW). The alignment would cross into the I-4 median in the area of 15<sup>th</sup> Street. The majority of the FHSR alignment would be within the ultimate ROW identified in the *Tampa Interstate Study* (TIS) for future interstate improvements; however some additional ROW would be required and has been coordinated with the City of Tampa.

The alignment would continue east within the I-4 median through Hillsborough and Polk counties. One station would be located in Polk County, where two locations were under consideration.

Entering Osceola County, the high speed rail alignment remains within the I-4 median. The proposed Walt Disney World Station would be located north of U.S. 192. The station platform would be located in the median and station facility would be located west of I-4 between U.S. 192 and the Osceola Parkway.

The alignment would continue into Orange County in the I-4 median until the I-4/Beachline Expressway (S.R. 528) interchange, where it would elevate and leave the I-4 median and run along the north side of S.R. 528 within existing ROW. The Orange County Convention Center multi-modal center site is located in the northeast quadrant of the International Drive/S.R. 528 Interchange. The Orange County Convention Center station would be located within the ROW of the interchange area.

The alignment would continue on the north side of S.R. 528 until east of the John Young Parkway (S.R. 423) Interchange where it would leave S.R. 528 and run on new alignment east to Taft-Vineland Road. The alignment would continue along Taft-Vineland Road and enter the City of Orlando property near Tradeport Drive. It would then follow the Orlando Utilities Commission rail line as a new alignment turning north crossing the Orlando International Airport (OIA) South Access Road and traversing through the limits of OIA from south to north, east of the proposed South Terminal.

The 2009 FEIS Reevaluation has determined that overall the preferred alternative alignment documented in the 2005 FEIS remains substantially unchanged; however, the preferred technology has changed. Investigation of current conditions and planned projects has resulted in some minor adjustments to the horizontal and vertical alignment. Supporting engineering plans and profiles are provided in FEIS Reevaluation. Areas where changes have occurred are:

- Station Areas: Tampa – Downtown, Walt Disney World/Celebration; Orange County Convention Center; Orlando International Airport – additional right of way and some relocation required for various stations (see Station discussion)
- I-4/I-275 Interchange Ramp D adjacent to Perry Harvey Senior Park – improvement to I-275 widened the existing roadway for ramp auxiliary lanes
- I-4/I-275 Proposed Flyover Ramp widening adjacent to Ybor City National Historic Landmark District – FDOT identified that the existing single lane flyover ramp needs to be widened to two lanes

- Transition to I-4 Median and Crosstown Connector – minimize structure length based on the construction of the ultimate I-4 improvements
- Columbus Avenue Relocation – improvements to I-4 realigned Columbus Avenue
- Emergency Median Crossovers – FDOT has established emergency evacuation crossovers through the I-4 corridor that will need to be relocated
- Tradeport Drive Area – minimize impacts to continued commercial development
- Orlando International Airport – continue HSR alignment to the north terminal consistent with OIA Master Plan.

The above changes to the conceptual engineering plans for the Preferred Alternative as described in the 2005 FEIS are included in the FEIS Reevaluation.

### **5.4.1. 2009 Reevaluation Preferred Alternative Station / Maintenance Facility Areas**

The 2005 FEIS initially evaluated 20-acre study areas for each of the proposed station locations. As each site was identified, the station area was finalized to take into account property lines and existing features. The following modifications to the FEIS station study areas were assessed and included in the conceptual plan revisions as part of the FEIS Reevaluation.

- **Tampa – Downtown Station** - The Tampa station area was expanded to include the 3.2-acre former jail site which was purchased by FDOT for use as an intermodal center. The building is currently being demolished.
- **Walt Disney World Station** - The Disney station area was shifted to the west to include a 5.6-acre area of open land in order to maintain a total 20-acre station area. The shift was necessary as a result of the construction of the Osceola Parkway Interchange and ramps within the 20-acre area identified in the 2005 FEIS.
- **Polk County (Lakeland) Station** – The 2005 FEIS and the 2009 FEIS Reevaluation includes two sites for environmental analysis, west of the Polk Parkway and at Kathleen Road – only one is to be selected for continued development. Included in the 2009 FEIS Reevaluation is a request by the City of Lakeland, Polk County and the University of South Florida Polytechnic for continued coordination into the design phase to verify the optimal location of a Polk County Station site to best serve Lakeland and the surrounding communities. FDOT is committed to continued coordination with the county, cities and local stakeholders in the continued project development phases. Should a station site other than the sites located at west SR 570 (Polk Parkway) or Kathleen Road be advanced, additional environmental analysis will be required.
- **Orange County Convention Center Station** – The Orange County Convention Center station area was expanded to the east to the existing parcel property line, an additional 2.0-acre area to provide maximum flexibility and proximity for the HSR station.
- **Orlando International Airport (OIA)** – In conformance with the OIA Master Plan, two station locations are considered under the Preferred Alternative: the future South Terminal Intermodal Center and the North Terminal Intermodal Center. The North and

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South Terminal Intermodal Centers are included in the Airport Master Plan as approved through the Federal Aviation Administration (FAA). The North and South Terminal Intermodal Centers received FTA NEPA clearance under the *OIA Intermodal Station Environmental Assessment*, September 2005.

- Maintenance Facility** – The Preferred Alternative identified a preference for two alternative sites for the FHSR maintenance facility site: one site located directly south of OIA (Site 3) and a site southeast of OIA, north of Boggy Creek Road (Site 2). These two sites were included in the 2005 FEIS for the gas turbine train. The 2005 FEIS also included two sites for the electric powered train: Site 3 and a site located southeast of OIA and south of Boggy Creek Road (Site 1). With continued commercial development south of Boggy Creek Road and the increase of relocations, Site 1 is removed from consideration, with Sites 2 and 3 remaining as alternative sites as analyzed in the 2005 FEIS and included in the 2009 FEIS Reevaluation.

### 5.4.2. Preferred Alternative Ridership

The ridership estimates for the 2005 FEIS Preferred Alternative were updated for 2009 based on the two independent, investment-grade models developed in 2002 and documented in the 2005 FEIS. The ridership estimates were based on the alignments for the Project and were not sensitive to the technologies. The models were updated to reflect the changes in the transportation network, growth and local land uses that have occurred since the 2005 FEIS was completed. Captive ridership/riders currently taking shuttle services provided by Disney and I-Drive destinations were separated from choice ridership (trips that would be diverted from other modes, such as private or rented autos, and public transit).

The results of the updated ridership and revenue forecasts are shown in **Table 5**. Annual ridership is not anticipated to change significantly from the previous 2002 forecasts. Annual revenue for the system is expected to increase.

**Table 5: Changes in 2010 Tampa-Orlando Ridership and Revenue for the Preferred Alternative**

Market	2010 Annual Ridership (millions)			2010 Annual Revenue (\$ millions)		
	2002 Study/2005 FEIS	2009 Reevaluation	Change	2002 Study/2005 FEIS	2009 Reevaluation	Change
<b>CHOICE MARKET</b>	1.9 to 2.3	1.9 to 2.4	+0.0 to +0.1	32.9 to 35.4	40.5 to 46.4	+7.6 to +11.0
<b>CAPTIVE</b>						
OIA to International Drive	0.5	0.6	+0.1	6.3	8.0	+1.7
OIA to Disney	<u>2.1</u>	<u>1.9</u>	<u>-0.2</u>	<u>26.3</u>	<u>27.2</u>	<u>+0.9</u>
Subtotal: Captive	0.5*	0.6*	+0.1*	6.3*	8.0*	+2.6*
<b>Total:</b>	2.4 to 2.8	2.5 to 3.0	+0.1 to +0.2	39.3 to 41.8	48.5 to 54.5	+10.2 to +13.6

*\*The 2002 Study (included in the 2005 FEIS) assumed that captive ridership associated with the OIA-Disney market would not be included, as Disney's participation in the preferred alignment was still under negotiation.*

## 6. AFFECTED ENVIRONMENT

The changes to the 2005 Preferred Alternative were primarily to accommodate the current as-built conditions within the improved interstate corridor and changes to minimize potential impacts to continued development within the corridor. These changes, as stated in Chapter 2 of the FEIS Reevaluation and illustrated in the revised plans included in Appendix B of the FEIS Reevaluation and discussed in the 2009 FEIS Reevaluation Preferred Alternative (Section 6.4) section of this document, are minimal within the 88-mile alternative and concentrated within the immediate Tampa CBD and in the Tradeport Drive industrial park area in Orange County.

The changes in existing conditions identified in Chapter 3 of the FEIS Reevaluation resulting in changes to the potential environmental impacts are summarized below:

- Relocations: reduction of one business impact in Tampa CBD and 3 additional business impacts in Tradeport Drive industrial area.
- Section 106: reduction of one historic structure with relocation by FDOT complete.
- Recreation and Park/Section 4(f): Changes to the City of Tampa's Perry Harvey Sr. Park boundaries since the 2005 FEIS and changes to the alternative reduce overall area of use.
- Air Quality, Noise, Vibration, Visual/Aesthetic, and Energy Consumption: changes based on technology preference from gas turbine-powered to electric-powered locomotive-hauled train.
- Contamination: additional sites resulting in the same number of sites with high risk ranking and an additional one site each for medium and low risk ranking.
- Wildlife and Habitat: one additional species (Everglades snail kite) afforded protection since 2005.

The above changes to the environmental impacts do not change the mitigation and commitments identified in the 2005 FEIS with the exception of regulatory changes in the permitting of wetlands, water quality, and wildlife and habitat.

**Table 6** identifies comparative analysis factors between the 2005 FEIS Preferred Alternative (gas turbine powered technology, Alternative 1) and the electric powered technology on the same alignment (Alternative 5) with the updated potential impacts assessed in the FEIS Reevaluation for the Revised Preferred Alternative (RPA).

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**Table 6: Change in Potential Environmental Impacts**

Resource	2005 FEIS Impacts Gas Turbine FEIS Preferred Alternative (Alternative 1)	2005 FEIS Impacts Electric Technology (Alternative 5)	Change in Impacts?	Revised Preferred Alternative (RPA) Impacts Electric Technology
<b>COMMUNITY IMPACTS</b>				
Community Cohesion	Minimal impacts to adjacent neighborhoods along I-4 in Tampa and to the south of the Tradeport Industrial Park	Same as 2005 FEIS Preferred Alternative	No	Same as 2005 FEIS Preferred Alternative
Community and Land Use Impacts	Consistent with local land use plans  Minimal impacts to existing land uses	Same as 2005 FEIS Preferred Alternative	No	Same as 2005 FEIS Preferred Alternative
Economic Impacts	Benefits in excess of costs	Same as 2005 FEIS Preferred Alternative	No	Same as 2005 FEIS Preferred Alternative
Safety and Public Health	No adverse impacts	Same as 2005 FEIS Preferred Alternative	No	Same as 2005 FEIS Preferred Alternative
Relocation and Right-of-Way Impacts	3 residential relocations 3 business relocations See Section 4(f) below.	Same as 2005 FEIS Preferred Alternative	Yes	3 residential relocations 5 business relocations
Environmental Justice	No disproportionate impacts	Same as 2005 FEIS Preferred Alternative	No	Same as 2005 FEIS Preferred Alternative
Section 106 - Archeological and Historical Resources	<u>Conditional Adverse Effect</u>  North Franklin Street Historic District (visual)  St. Paul AME Church Parsonage (visual)  Oaklawn Cemetery (visual construction vibration)  Ybor City NHLD (direct taking of two contributing buildings; visual, construction vibration)  German American Club – Visual impacts, construction vibration	Same as 2005 FEIS Preferred Alternative	Yes*	Same impacts as listed for FEIS Preferred Alternative, less direct impact of one contributing building in Ybor City NHLD do to relocation per TIS project*
Recreation and Parkland	Use of 0.184 acres, Perry Harvey Sr. Park	Use of 0.184 acres, Perry Harvey Sr. Park	Yes	Use of 0.05 acres, Perry Harvey Sr. Park

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**Table 6: Change in Potential Environmental Impacts**

Resource	2005 FEIS Impacts Gas Turbine FEIS Preferred Alternative (Alternative 1)	2005 FEIS Impacts Electric Technology (Alternative 5)	Change in Impacts?	Revised Preferred Alternative (RPA) Impacts Electric Technology
Section 4(f) Impacts	Use of 0.184 acres, Perry Harvey Sr. Park	Use of 0.184 acres, Perry Harvey Sr. Park	Yes	Use of 0.05 acres, Perry Harvey Sr. Park
Secondary and Cumulative Impacts	No adverse impacts	Same as 2005 FEIS Preferred Alternative	No	Same as 2005 FEIS Preferred Alternative
<b>NATURAL AND PHYSICAL IMPACTS</b>				
Visual/Aesthetic	No adverse impacts	Same as 2005 FEIS Preferred Alternative	No	Same as 2005 FEIS Preferred Alternative
Air Quality	Emissions (tons/year):	Emissions (tons/year):	Yes	Same as 2005 FEIS Alternative 5
	CO : -101.7 tons/year	CO: -152.0		
	NOx: +189.0	NOx: +23.3		
	VOC: +8.9	VOC: -8.1		
Noise <sup>1</sup>	Cat. 1: 0	Cat. 1: 0	Yes	Cat. 1: 0
	Cat. 2: 15 (7 moderate, 8 severe)	Cat. 2: 52 (24 moderate, 28 severe)		Cat. 2: 30 (13 moderate, 17 severe)
	Cat. 3: 0	Cat. 3: 1 (Perry Harvey Sr. Park)		Cat. 3: 1
Vibration <sup>1</sup>	Cat 1: 1	Cat 1: 1	Yes	Cat. 1: 1
	Cat. 2: 44	Cat. 2: 13		Cat. 2: 8
	Cat. 3: 0	Cat. 3: 0		Cat. 3: 0
Wetlands	40 acres (total impacts) 11 high quality wetlands impacted	25.6 acres (total impacts) 11 high quality wetlands impacted	Yes	35.8 acres (total impacts) 11 high quality wetlands impacted.
Aquatic Preserves	No impacts	No impacts	No	No impacts
Water Quality	No adverse impacts	No adverse impacts	No	No adverse impacts
Outstanding Florida Waters	No impacts	No impacts	No	No impacts
Contamination	Risk Ranking	Risk Ranking	Yes	Risk Ranking
	High : 7	High : 7		High : 7
	Medium: 0	Medium: 0		Medium: 1
	Low: 0	Low: 0		Low: 1

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**Table 6: Change in Potential Environmental Impacts**

Resource	2005 FEIS Impacts Gas Turbine FEIS Preferred Alternative (Alternative 1)	2005 FEIS Impacts Electric Technology (Alternative 5)	Change in Impacts?	Revised Preferred Alternative (RPA) Impacts Electric Technology
Wild and Scenic Rivers	No impacts	No impacts	No	No impacts
Floodplain and Floodway Impact	Base Floodplain Encroachment: 56.88 acres  Base Floodway Encroachment: 9.45 acres	Base Floodplain Encroachment: 56.88 acres  Base Floodway Encroachment: 9.45 acres	No	Base Floodplain Encroachment: 56.88 acres  Base Floodway Encroachment: 9.45 acres
Coastal Zone Consistency	No impacts	No impacts	No	No impacts
Coastal Barrier Resources	No impacts	No impacts	No	No impacts
Wildlife and Habitat, including Protected Species	9 Protected Species  No adverse impacts	9 Protected Species  No adverse impacts	Yes	10 Protected Species  No adverse effects
Farmlands	No impacts	No impacts	No	No impacts
Energy Consumption	498,855 Million BTU	239,820 Million BTU	Yes	Same as 2005 FEIS Alternative 5
Utilities	No adverse impacts	No adverse impacts	No	No adverse impacts
<b>TRANSPORTATION</b>				
Freight Rail Operations Impacts	No impacts	No impacts	No	No impacts
Highway Operations Impacts	Net reduction in VMT: 21,080,963 miles  No adverse impacts	Net reduction in VMT: 21,080,963 miles  No adverse impacts	No	Net reduction in VMT: 21,080,963 miles  No adverse impacts
Station Access and Traffic Impacts	No adverse impacts	No adverse impacts	No	No adverse impacts
Airport Operations	No impacts	No impacts	No	No impacts
<b>CONSTRUCTION IMPACTS</b>				
Construction impacts	No adverse impacts	No adverse impacts	No	No adverse impacts
<i>Source: Parsons, PBS&amp;J, HMMH September 2009</i> <sup>1</sup> Notes: <b>Category 1</b> receptors are buildings and/or parks; <b>Category 2</b> receptors are residences, hospitals, hotels; <b>Category 3</b> receptors are schools, libraries, churches, and active parks.				

### **6.1. Relocation and Right of Way**

The 2005 FEIS indicated that the Preferred Alternative and the Revised Preferred Alternative (RPA) (Alternative 5 in the 2005 FEIS) would both require three (3) residential relocations located in two (2) structures near I-4 and 12<sup>th</sup> Avenue in the Ybor City area and three business relocations including the City of Tampa Recreation Department, the former Hillsborough County Sheriff's Office and Jail Complex, and a bail bondsman office.

Since publication of the 2005 FEIS, redevelopment of the former Hillsborough County Sheriff's Office and Jail Complex site has begun and the buildings are no longer present. Therefore, these relocations are no longer needed.

Further, since 2005 additional development has occurred in the Tradeport Industrial Park. The alignment was optimized to reduce additional right-of-way needs in this area to the extent practicable. However, three (3) additional business relocations would be needed for the project, as follows:

- At the northwest corner of Tradeport Drive and Ringhaver Drive, a large commercial distribution building (10260 Tradeport Drive) was constructed and does not appear on the project aerials. As of September 2, 2009, the building is vacant. The FHSR alignment clips the northeast corner of this building and the operation of the rear loading bays.
- Two commercial structures located in the Atlas Commercial Park (11128 and 11112 Boggy Creek Road) are also impacted. As of September 2, 2009, these building are vacant.

The ROW and relocation program will be carried out in accordance with the Uniform Relocation Assistance and Real Property Acquisition Act of 1970.

### **6.2. Section 106 Consultation and Memorandum of Agreement**

The FDOT coordinated the historic resources impact analysis with the Florida State Historic Preservation Office (SHPO) and the Advisory Council on Historic Preservation (Council).

The coordination with the SHPO and Council during analysis of the 2005 FEIS Preferred Alternative resulted in a "conditional no adverse effect" on the following five historic resources:

- North Franklin Street Historic District – Visual impacts
- St. Paul AME Church Parsonage – Visual impacts
- Oaklawn Cemetery – Visual impacts, construction vibration
- Ybor City NHLD - Direct taking of two contributing buildings: 8HI4174/916 E. 12th Avenue, and the rear building at 8HI4178/1006 E. 12th Avenue; Visual, Construction Vibration
- German American Club – Visual impacts, construction vibration

The 2009 FEIS Reevaluation Revised Preferred Alternative verified that there are no changes to the impacts identified in the 2005 FEIS. The commitments stated in the 2005 FEIS remain valid.

Since publication of the 2005 FEIS, FDOT began the right-of-way acquisition process for the *Tampa Interstate Study (TIS)*. As a result many of the historic structures along 12<sup>th</sup> Avenue in the Ybor City NHLD have been relocated, including the property at 1006 E. 12<sup>th</sup> Avenue (8HI4178) which was listed as a direct taking in the 2005 FEIS.

It is important to note that these impacts to historic resources were evaluated as part of a *Cultural Resource Assessment Survey* (July 2003) prepared to identify and evaluate cultural resources (historic structures and archaeological sites) within the project's Area of Potential Effect (APE). Further, a *Section 106 Consultation Case Report* (December 2003) was then prepared to evaluate potential effects for the Preferred Alternative and extensive coordination occurred with SHPO. As a result of this coordination, it was determined that the Preferred Alternative, based on a set of stipulated conditions, would have a "conditional no adverse effect" on the resources listed above.

Even though the impacts within the Ybor City NHLD included a direct taking of contributing historic resources, the SHPO determined that there would be no adverse effect because these buildings were previously identified as being acquired by the *Tampa Interstate Study Final Environmental Impact Statement and Section 4(f) Evaluation* (1996) and are located within the TIS Ultimate ROW. A Memorandum of Agreement (MOA) was prepared at that time to mitigate adverse effects to the Ybor City NHLD.

During the consultations with the SHPO, it was determined that the FHSR project would follow the requirements of this MOA. The mitigation and commitments are consistent with this MOA.

### **6.3. Section 4(f) Determination**

Section 4(f) of the US Department of Transportation (DOT) Act of 1966 stipulates that DOT agencies cannot approve the use of land from publicly owned parks, recreation areas, wildlife refuges, or public and private historical sites unless there is no feasible and prudent alternative to such use and the project includes all possible planning to minimize the harm to the property resulting from use.

The Section 4(f) evaluation for the potential HSR alignments and stations documented in Section 5 of the FEIS and Section 4.4 of the FEIS Reevaluation indicates that one Section 4(f) resource, Perry Harvey Sr. Park, will be used by the project. The supporting information in the 2005 FEIS and the 2009 FEIS Reevaluation, summarized below, demonstrates that there are unique problems or unusual factors involved with any alternative that would avoid this Section 4(f) property. Potential avoidance alternatives fail to meet the project purpose and need, fail to meet the objectives of those responsible for the resource used, or result in impacts of extraordinary magnitude to the environment or the community.

Based on the documentation presented in the FEIS and updated in the FEIS Reevaluation, the FRA has determined that:

- The Project is a feasible and prudent alternative with the least harm to Section 4(f) resources;
- There is no feasible or prudent alternative to the use of the above Section 4(f) resources; and

- The Project includes all possible planning to minimize harm to the resources resulting from such use. These measures are identified in the Project mitigation and commitments attached as Appendix B.

During the reevaluation process, the preferred alignment shifted slightly in the vicinity of the Ybor City NHLD and Perry Harvey Sr. Park, both of which are Section 4(f) resources. Right-of-way requirements were minimized in the vicinity of these resources.

In the case of the Ybor City NHLD, the right-of-way required by the FHSR project is still within the TIS Ultimate ROW which was cleared as a part of the *Tampa Interstate Study Final Environmental Impact Statement and Section 4(f) Evaluation* (1996). Further, a Memorandum of Agreement (MOA) was negotiated with the SHPO for that project to mitigate the adverse effects to the Ybor City NHLD from taking the right-of-way. Therefore there are no changes to the Section 4(f) evaluation for the Ybor City NHLD.

In the case of Perry Harvey Sr. Park, as stated in the original Section 4(f) Evaluation in the 2005 FEIS, the FHSR project will comply with the specific commitments and stipulations identified in the existing Tampa Interstate Study (TIS) FEIS for the Ultimate ROW requirements. The commitment is based on the assumption that the FHSR will be constructed prior to the construction of the Ultimate TIS.

Since the approval of the 2005 FHSR FEIS, the interim reconstruction of I-275/I-4 interchange has occurred. In addition, FDOT has proposed a safety improvement requiring an additional lane be constructed to the outside of the ramp running from SB I-275 to EB I-4. As a result of the safety improvement, the FHSR ROW has been minimized to a ROW width of 44 feet and relocated slightly to the south and west. The FHSR ROW remains within the TIS Ultimate ROW footprint. It is anticipated that FHSR will run 18 to 24 feet above the park on an elevated track as it enters the Tampa Central Business District (CBD) station. Initial calculations indicate the potential impact to the park will be reduced from the amount of land to be acquired from 0.184 acres (2005 FEIS) to .05 acres (FEIS Reevaluation).

During the 2005 FEIS it was determined that there would be a potential for moderate noise level increases (proximity effects). An evaluation of vibration, access, aesthetics, and ecological encroachment indicates that the project will not substantially impair or diminish the use of the park, and a determination was made that there will be no constructive use. These conclusions have not changed. Coordination with the City of Tampa includes memorandum in the FEIS Reevaluation identifying the City's continued support of the project with commitment of FDOT to meet the specific commitments and stipulations identified in the TIS FEIS.

#### **6.4. Air Quality**

The US Environmental Protection Agency (EPA) regulation implementing the Clean Air Act (40 CFR Parts 51 and 93) establishes criteria for demonstrating that a federally assisted project is in conformity with the State Implementation Plan or maintenance plans developed for Hillsborough, Polk, Osceola and Orange Counties. This Project is identified in the Long Range Transportation Plans for the three Metropolitan Planning Organizations that represent the various local governments through the Project area. The General Conformity Rule (40 C.F.R. Part 93, Subpart B) is applicable to areas that have been designated as non-attainment or maintenance with respect to the National Ambient Air Quality Standards (NAAQS). Polk, Osceola and

Orange Counties were designated as in attainment of the NAAQS in the 2005 FEIS. The FEIS Revaluation identified that Hillsborough County was re-designated in attainment of the NAAQS in 2005 following completion of the 2005 FEIS. Thus, all counties in the Project are in attainment and determination of conformity with the State Implementation Plan or plan to maintain the NAAQS is not required.

The Revised Preferred Alternative would result in a net decrease in regional emissions of carbon monoxide (CO) and volatile organic compounds (VOC) and a small increase in regional emissions of nitrogen oxides (NOX). The net increase in emissions of NOX is a result of the emission rate of this pollutant from power plants that produce electricity through the combustion of fossil fuels. The emissions analysis is based on use of coal as the source for power generation; a worst case scenario.

### **6.5. Noise**

The noise impact assessment was updated along the entire corridor to account for land use and alignment changes since the 2005 FEIS was published. In summary, there are substantially fewer predicted noise impacts than projected in the FEIS.

The 2005 FEIS predicted that the Preferred Alternative would have impacts at a total of 15 residential buildings (eight with severe impact and seven with moderate impact), one hotel (moderate impact) and one park (Perry Harvey Sr.). The FEIS also documented the impacts of Alternative 5 (the comparable alternative given the change in the preferred technology), which was predicted to have noise impacts at a total of 52 residential buildings (24 with severe impact and 28 with moderate impact), one hotel (moderate impact), and one park (Perry Harvey). The factors attributing less impact by the gas turbine-hauled train include track proximity and height as well as train speed.

The updated analysis of the Revised Preferred Alternative predicts fewer impacts when compared to the electric-hauled train (Alternative 5) in the 2005 FEIS, including 30 residential buildings (13 with moderate impacts and 17 with severe impacts); one hotel (moderate impact) and one park (Perry Harvey). Importantly, none of the newly identified sensitive receptors along the corridor were predicted to have impacts.

The lower number of predicted impacts is a result of alignment shifts away from sensitive receptors near Station 6010 (in the vicinity of the I-4/I-275 interchange in Tampa) and between Stations 7670 and 7700 in the Taft area near Orlando.

### **6.6. Vibration**

The vibration impact assessment was updated along the entire corridor to account for land use and alignment changes since the 2005 FEIS was published. In summary, the Revised Preferred Alternative vibration impacts are expected at three residences, five hotels, and one commercial building that houses vibration sensitive equipment. In comparison, the 2005 FEIS Preferred Alternative was predicted to have 33 residences, 11 hotels, and the same commercial building and Alternative 5 was predicted to have impacts at one residence, 13 hotels and the commercial building.

The large reduction in the total number of vibration impacts is due to changes in existing conditions and the difference between the vibration characteristics of the electric and the gas turbine trains. Not only are some of the residences and hotels previously affected no longer present but new receptors were also identified, particularly in the middle section of the alignment. None of the new receptors were predicted to have vibration impacts.

Gas turbine trains have higher vibration levels at lower frequencies than electric trains. This is likely due to the difference in weight between the two vehicles; the gas turbine train consist weighs almost twice as much as the electric train consist. Furthermore, when the ground exhibits more efficient vibration propagation characteristics at low frequencies, there is a greater difference in vibration impact between the two technologies.

### **6.7. Wetlands**

The Preferred Alternative (Alternative 1) documented in the 2005 FEIS would result in a total of 40 acres of wetland impacts to 11 high quality wetlands, while Alternative 5 was predicted to result in 25.6 acres of impacts to 11 high quality wetlands. Even though these alternatives share the same alignment and station locations, they each assumed a different maintenance facility.

The Revised Preferred Alternative would result in 35.8 acres of impacts to 11 high quality wetlands. This accounts for changes in existing conditions with the revised location for the maintenance facility for Alternative 5 since the FEIS was published and the design changes documented in Chapter 2 of the FEIS Reevaluation. The Revised Preferred Alternative with the same maintenance facility location, as identified with the 2005 FEIS Preferred Alternative 1, reduces impacts by 4.2 acres.

The 2005 FEIS indicates that either FDEP (Florida Department of Environmental Protection) or the Water Management Districts (WMD) may be the reviewing agency for the Environmental Resource Permit. Because this project crosses multiple WMD districts, the FDEP will likely take the lead on permitting so that a comprehensive review of the entire corridor can occur. However, this decision will be made during the final design and permitting phase.

The 2005 FEIS also states that “Any project which results in the disturbance of five or more acres of land would require a National Pollutant Discharge Elimination System (NPDES) permit from FDEP, pursuant to 40 C.F.R Parts 122 and 124.” The regulations governing the NPDES have been modified since 2005 such that any project that results in the disturbance of one or more acre of land will require a NPDES permit. Also, because a General Permit exists for this type of work, a permit application for a NPDES will not be required. Instead, a Notice of Intent to utilize the General Permit is required to be submitted by the construction contractor 48 hours prior to construction commencement.

### **6.8. Contamination**

The 2005 FEIS Preferred Alternative identified five potentially hazardous material contaminated sites and two potentially petroleum contaminated sites within the alignment. There are no potentially contaminated sites associated with the preferred station locations and maintenance yard.

Based on the design modifications of the Revised Preferred Alternative, a review of the potential for additional hazardous materials sites that could potentially be encountered during construction was assessed. Five additional sites were identified. Given the contamination concern at these sites and their location relative to the FHSR project, three of these sites were found to pose no risk to the project, one was found to pose a low risk and one was found to pose a medium risk.

The sites identified will be investigated further prior to any construction. Investigative work will include visual inspection, monitoring of ongoing cleanups, and possible subsurface investigations. At known contamination sites, estimated areas of contamination will be marked on design drawings. Prior to construction, any necessary cleanup plans will be developed. Actual cleanup will take place during construction, if feasible. Special provisions for handling unexpected contamination discovered during construction will be included in the construction plans package.

### **6.9. Floodplains**

The Preferred Alternative from 2005 and the Revised Preferred Alternative would potentially impact approximately 56.88 ac. of floodplain and approximately 9.45 ac. of floodway. Subsequent to final design, during which impacts would be avoided or minimized, floodplain and floodway impacts would again be calculated and the amount of mitigation would be determined. Coordination with the water management districts will identify areas appropriate for mitigation of the volumetric impacts of the preferred alternative that will not increase or significantly change the flood elevations and/or limits.

### **6.10. Wildlife and Habitat, Protected Species**

The expansion of the Tampa, Disney and Orange County Convention Center station areas do not result in additional protected species concern. The Tampa Jail Site is urban and developed and provides no protected species habitat. The area of expansion of the Disney Station Area does not result in a new habitat type or protected species concerns. The new additional area for the OCCC site is minimal and does not provide different habitat than what has already been considered.

Since the 2005 FEIS, the bald eagle was delisted (with the exception of the desert bald eagle in Arizona) and is no longer protected under the Endangered Species Act as of June 28, 2007. However, the bald eagle is still provided protection by two other federal laws, the Migratory Bird Treaty Act of 1918 and the Bald and Golden Eagle Protection Act, as amended. The state of Florida also delisted the bald eagle.

An additional species, the Everglades snail kite (*Rostrhamus sociabilis*) has been afforded additional protection since the 2005 FEIS. A consultation area for the snail kite is now in place over Polk County and much of Osceola County. Although it is unlikely that this species will be affected by the project as habitat in the area is suboptimal, consultation with and concurrence from the U.S. Fish and Wildlife Service (USFWS) will be required because the corridor is within the snail kite's designated consultation area.

The Revised Preferred Alternative will have no effect on the following federally protected species with potential habitat in the project vicinity: American alligator, Florida scrub-jay, Florida panther, and Florida manatee. It is also anticipated to have no effect on the following

state-only protected species: Florida pine snake, Florida burrowing owl, Southeastern American kestrel, Florida black bear, and protected plant species. The Revised Preferred Alternative may affect, but is not likely to adversely affect the following federally protected species: Eastern indigo snake, sand skink, Everglade's snail kite, and wood stork. The project may affect but is not likely to adversely affect the following state-only protected species: gopher tortoise, Florida mouse, gopher frog, Florida sandhill crane, Sherman's fox squirrel, and state protected wading bird species. As part of mitigation commitments, FDOT will continue to coordinate with the U.S. Fish and Wildlife Service (USFWS), the Water Management Districts (WMDs), and Florida Fish and Wildlife Conservation Commission (FFWCC) to develop design and construction methods to avoid and minimize impacts to these species.

### **6.11. Energy**

The switch to the electric train technology results in an overall lower net energy consumption since the consumption is considerably lower than the gas turbine train technology. The 2005 FEIS shows the net energy consumption dropping from 498,855 million BTU (2005 FEIS Preferred Alternative) to 239,820 million BTU (2005 Alternative 5, Revised Preferred Alternative).

These predictions factor in the reduction of gasoline consumption by diverting automobile ridership, the power required to propel the train, operate and maintain the new system and thermal losses for electric power generation. As a part of the reevaluation effort, the ridership projections were updated and show a slight increase in riders. This increase would lower VMT only slightly resulting in a negligible decrease in the energy demands of the Revised Preferred Alternative. The slight shifts in alignment and station locations also would not affect the energy consumption predictions listed above.

The total change is a very small fraction (less than 1/20th of one percent) of Florida's total energy consumption for surface transportation (all non-military vehicle operation on highways, railroads, and fixed-guideway public transportation), which is estimated to reach one quadrillion BTUs (i.e., 1,000,000,000 MBTU) by 2010.

### **6.12. Means to Avoid and Minimize Environmental Harm**

FRA and FDOT are committed to working with our partners and stakeholders in the development of this project, and will continue to coordinate the required mitigation and commitments for the FHSR project as a means to avoid and minimize environmental harm. **Appendix B** documents the commitments and mitigation from the 2005 FEIS and any changes or updates needed based on changes in potential impacts or regulations based on the FEIS Reevaluation.

### **6.13 Environmentally Preferable Alternative**

The environmentally preferable alternative resulting from the FEIS Reevaluation remains the same as the environmentally preferable alignment identified in the 2005 FEIS (the No Build Alternative). The No Build Alternative still has less direct and indirect impact to the environment than the build alternatives. However, as noted in the FEIS, the No Build Alternative does not

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## Florida High Speed Rail Record of Decision

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meet the project purpose and need. It fails to enhance intercity passenger mobility in Florida by expanding passenger transportation capacity or by providing an alternative to highway and air travel. Congestion on Interstate 4 can be expected to continue to grow under the No Build Alternative.

The Revised Preferred Alternative assessed in the FEIS Reevaluation, as described above, has been developed in a manner so as to minimize environmental impacts. It would use existing transportation corridors to minimize environmental impacts and provides environmental and transportation benefits in the form of increased efficiency in energy use for transportation, decreased energy consumption, increased mobility, safety, reliability, travel times and accessibility, and reduced vehicle miles travelled for intercity trips.

The changes in existing conditions identified in Chapter 3 of the attached 2009 FEIS Reevaluation (Appendix A) of this document resulted in changes to the environmental impacts as summarized in the following:

- Relocations: reduction of one business impact in Tampa CBD and 3 additional business impacts in Tradeport Drive industrial area.
- Section 106: reduction of one historic structure with relocation by FDOT complete.
- Recreation and Park/Section 4(f): Changes to the City of Tampa's Perry Harvey Sr. Park boundaries since the 2005 FEIS and changes to the alternative reduce overall area of use.
- Air Quality, Noise, Vibration, Visual/Aesthetic, and Energy Consumption: changes based on technology preference from gas turbine-powered to electric-powered locomotive-hauled train.
- Contamination: additional sites resulting in the same number of sites with high risk ranking and an additional one site each for medium and low risk ranking.
- Wildlife and Habitat: one additional species (Everglade's snail kite) afforded protection since 2005.

The above changes to the environmental impacts do not change the mitigation and commitments identified in the 2005 FEIS and included as Appendix B in this document with the exception of regulatory changes in the permitting of wetlands, water quality, and wildlife and habitat.

## 7. DECISION

### 7.1. Basis for Decision

FDOT, in coordination with FRA, proposes to implement HSR service in the initial segment of the Florida High Speed Rail Corridor between Tampa and Orlando. The purpose of FHSR is to enhance intercity passenger mobility in Florida by expanding passenger transportation capacity and providing an alternative to highway and air travel. Increased mobility is viewed as essential for the sustained economic growth of the region, as well as the quality of life of the region's residents and visitors. Presently, passenger mobility in the Tampa-Orlando corridor is provided primarily by highways, particularly I-4. Projected transportation demand and travel growth, as prompted by social demand and economic development and compared to existing and future roadway capacity, show a serious deficit in available capacity. In addition, increasing population, employment, and tourism rates continue to elevate travel demand in the study corridor. Implementation of the FHSR project will help address these needs. In addition, the Passenger Rail Investment and Improvement Act of 2008 established high-speed rail corridor development as an important component of the Nation's transportation policy. Implementation of the FHSR Project is consistent with the Department of Transportation and FRA's vision of the important role high-speed intercity passenger rail can play in certain travel markets (see *Vision for High-Speed Rail in America*, April 2009 <http://www.fra.dot.gov/downloads/rrdev/hsrstrategicplan.pdf>) In the 2005 FEIS, gas turbine-powered technology was identified as the Preferred Alternative. Since then, the electric-powered technology has emerged as the preferred technology, on the same alignment, based on the current initiatives to reduce carbon emissions and dependency on foreign oil. The 2005 FEIS and the 2009 Reevaluation have shown that environmental impacts have been minimized with the selection of the alignment along existing transportation corridors.

The FRA, in accordance with NEPA and the NEPA implementing regulations (40 CFR Parts 1500-1508; 64 FR 28545 and 23 CFR Part 771), finds that the requirements of NEPA have been satisfied for FHSR Rail Tampa – Orlando project.

The environmental record for FHSR Tampa-Orlando Corridor includes the Draft EIS (August 2003), the Final EIS (July 2005), the Reevaluation to the FEIS (October 2009), and the comments from the circulation of the 2005 Final EIS. These documents represent the detailed analysis and findings required by NEPA on:

- The environmental impacts of the proposed project
- Alternatives to the proposed project
- Irreversible and irretrievable impacts on the environment which may be involved in the proposed project should it be implemented.

On the basis of the evaluation of social, economic, and environmental impacts contained in the DEIS, FEIS, FEIS Reevaluation and the written and oral comments offered by the public and by other agencies, the FRA determines that:

- Adequate opportunity was afforded for the presentation of views by all parties with a significant economic, social, or environmental interest, and fair consideration was given

to the preservation and enhancement of the environment and to the interest of the communities in which the proposed project is located and

- All reasonable steps were taken to minimize adverse environmental effects of the proposed project, and where adverse environmental effects remain, they have been fully reported in the DEIS, FEIS and FEIS Reevaluation.

The extensive opportunities provided for public and other stakeholder involvement in Project planning and decision-making are described in Chapter 6 of the 2005 FEIS and summarized in **Appendix C** of this ROD. The reasonable steps to minimize adverse environmental effects are described in Chapter 4 of the 2005 FEIS, Chapter 4 of the FEIS Reevaluation and are summarized in Appendix B of this ROD.

This ROD also documents compliance with other applicable federal environmental laws, rules and regulations as follows:

### **7.2. Section 106 of the National Historic Preservation Act**

Section 106 of the NHPA of 1966 requires that any federal agency having direct or indirect jurisdiction over a proposed federal or federally assisted undertaking take into account the effect of the undertaking on any district, site, building, structure, or other object that is listed or eligible for listing on the National Register of Historic Places. Under this provision, the NEPA lead agency, the State Historic Preservation Officer (SHPO), affected Native American tribes, and other “consulting” parties participate in a consultation process regarding the potential effects of the undertaking on historic resources. Coordination with the Florida SHPO includes:

- Concurrence with Cultural Resource Assessment Survey (CRAS) Methodology and Area of Potential Effect (APE), March, 2003
- SHPO Concurrence with Corridor Study CRAS Findings, April 15, 2003
- SHPO Concurrence for PD&E CRAS Findings, September 15, 2003
- SHPO Concurrence on Section 106 Findings, January 5, 2004

Through this coordination it was determined that the Revised Preferred Alternative, based on a set of stipulated conditions, would have a “conditional no adverse effect” on historic resources.

### **7.3. Floodplains and Floodways Finding**

DOT Order 5620.2 implements Executive Order 11988, *Floodplain Management and Protection*. These orders state that FRA may not approve an alternative involving a significant encroachment unless FRA can make a finding that the proposed encroachment is the only practicable alternative. The major purposes of Executive Order 11988 are to avoid Federal support for floodplain development; to prevent uneconomic, hazardous, or incompatible use of floodplains; to restore and preserve the natural and beneficial floodplain values; and to be consistent with the standards and criteria of the National Floodplain Insurance Program.

FRA concludes that the Project will not result in any substantial adverse impact on natural and beneficial values of the floodplains, will not result in a substantial change in flood risks or

damage, and will not have a substantial potential for interruption or termination of emergency service and evacuation routes.

#### **7.4. Wetlands Finding**

Presidential Executive Order 11990, "Protection of wetlands," directs federal agencies to avoid to the extent possible the long- and short-term adverse impacts associated with the destruction or modification of wetlands and to avoid direct or indirect support of new construction in wetlands wherever there is a practicable alternative. The following sets forth the basis for this finding for the Project.

The Revised Preferred Alternative (Alternative 5) would result in 35.8 acres of potential wetland impacts resulting from the electric powered technology, of which 11 are considered high quality wetlands. Wetland impacts, which would result from the construction of FHSR, are proposed to be mitigated pursuant to S. 373.4138 F.S. to satisfy all mitigation requirements of Part IV, Chapter 373, F.S. and 33 U.S.C.1344. Impacts to wetlands by the Project cannot be practicably avoided or minimized beyond present efforts and identified mitigation measures are included in Appendix B.

Based upon the above considerations, FRA determines that, under the requirements of Executive Order 11990, there are no practicable alternatives to the proposed construction in wetlands, and that the proposed action includes all practicable measures to minimize harm to these resources.

#### **7.5. Endangered Species Finding**

There are 24 federal and/or state protected species that have the potential or are known to occur within the FHSR study area. Six of those species are reptiles and amphibians, eleven are birds, five are mammals, and the remaining two are plants. Because the design/build alternatives use existing transportation corridors that pass through potential habitat, any of the alternatives may affect some potential sites, but it is not likely to adversely affect any of the species. Furthermore, the FDOT has committed to providing wildlife crossings in Polk County along I-4 during construction of the ultimate interstate improvements, including the FHSR project.

The Revised Preferred Alternative will have "no effect" on the following species: American alligator, Everglades snail kite, Florida pine snake, Florida scrub jay, Florida burrowing owl, Southeastern American kestrel, Florida panther, manatee, Florida black bear, and protected plant species. The Revised Preferred Alternative "may affect, is not likely to adversely affect" the following species: Eastern indigo snake, gopher tortoise, Florida mouse, gopher frog, sand skink, Florida sandhill crane, bald eagle, wood stork, state protected wading bird species, and Sherman's fox squirrel. As part of mitigation commitments, FDOT will continue to coordinate with USFWS, the WMDs, and FFWCC to develop design and construction methods to avoid and minimize impacts to these species."

FRA has determined that no formal consultation in accordance with Section 7 of the Endangered Species Act is required based upon the findings summarized above.

**7.6. Environmental Justice Finding**

Executive Order 12898, *Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations*, requires that each Federal Agency shall make achieving environmental justice part of its mission by identifying and addressing, as appropriate, disproportionately high and adverse human health or environmental effects of its programs, policies, and activities on minority populations and low-income populations.

The Project is within an existing transportation corridor and would not bisect any minority or low-income neighborhoods nor require the displacement of any residences in those neighborhoods. The anticipated human and environmental effects of the Project would not be disproportionately borne by the minority or low-income populations within the study area. Based upon these findings, FRA determines that the Project is in accordance with requirements of Executive Order 12898.

**7.7. Section 4(f) Determination**

Section 4(f) of the US Department of Transportation (DOT) Act of 1966 stipulates that DOT agencies cannot approve the use of land from publicly owned parks, recreation areas, wildlife refuges, or public and private historical sites unless there is no feasible and prudent alternative to such use and the project includes all possible planning to minimize the harm to the property resulting from use.

The Section 4(f) evaluation for the potential HSR alignments and stations documented in Section 5 of the FEIS and Section 4.4 of the FEIS Reevaluation indicates that one Section 4(f) resource, Perry Harvey Sr. Park, will be used by the project. The supporting information in the FEIS Reevaluation, summarized below, demonstrates that there are unique problems or unusual factors involved with any alternative that would avoid this Section 4(f) property. Potential avoidance alternatives fail to meet the project purpose and need, fail to meet the objectives of those responsible for the resource used, or result in impacts of extraordinary magnitude to the environment or the community.

Based on the documentation presented in the FEIS and updated in the FEIS Reevaluation, the FRA has determined that:

- The Project is a feasible and prudent alternative with the least harm to Section 4(f) resources;
- There is no feasible or prudent alternative to the use of the above Section 4(f) resources; and
- The Project includes all possible planning to minimize harm to the resources resulting from such use. These measures are identified included in Attachment A.

During preparation of the 2005 FEIS it was determined that there would be a potential for moderate noise level increases (proximity effects). An evaluation of vibration, access, aesthetics, and ecological encroachment indicates that the Project will not substantially impair or diminish the use of the park, and a determination was made that there will be no constructive use. These conclusions have not changed. Coordination with the City of Tampa includes a memorandum in the FEIS Reevaluation identifying the continued commitment of FDOT to meet the specific commitments and stipulations identified in the TIS FEIS.

## 8. CONCLUSION

The FRA has reached a decision based on the information and analysis contained in the 2005 FEIS and the 2009 FEIS Reevaluation. FRA selects the FEIS Reevaluation Revised Preferred Alternative, also described in this document as 2005 FEIS Alternative 5, with electric powered technology, because this alternative: 1) best satisfies the Purpose and Need, 2) minimizes impacts to the natural and human environment through the use of existing transportation corridors and other adopted mitigation measures, 3) has been selected based on processes in compliance with NEPA and other applicable requirements, and 4) may be advanced.



Joseph C. Szabo  
Administrator  
Federal Railroad Administration

Date: \_\_\_\_\_

5/7/10

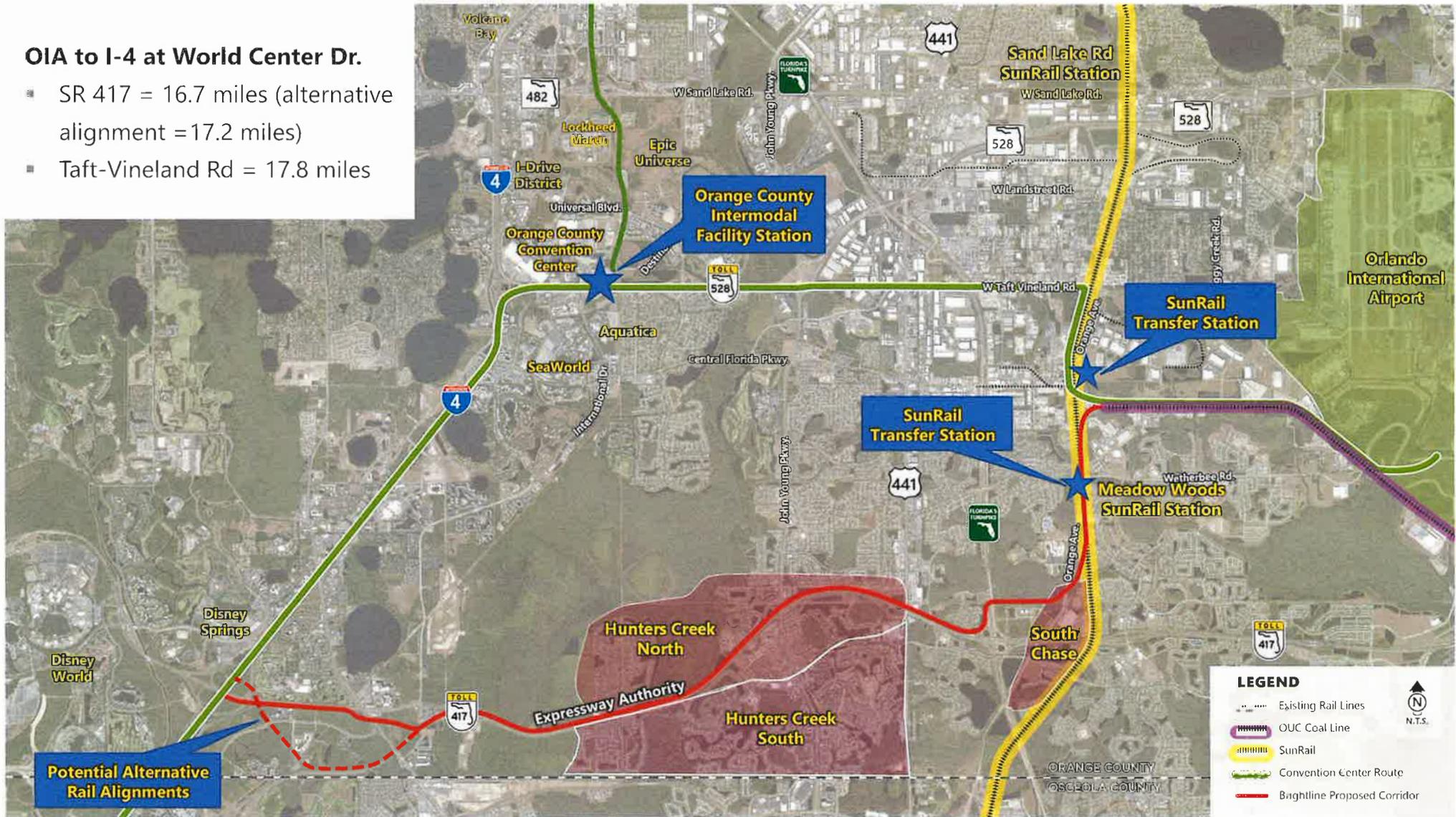
Attachments:

- Appendix A - Final Environmental Impact Statement Reevaluation
- Appendix B - Mitigation and Commitments
- Appendix C - Public Involvement/Comment Summary

## **EXHIBIT 2**

### OIA to I-4 at World Center Dr.

- SR 417 = 16.7 miles (alternative alignment = 17.2 miles)
- Taft-Vineland Rd = 17.8 miles



## **EXHIBIT 7**

The proposed Brightline Train will run along a concrete wall rising as much as 35 feet above the Kempton Chase community's ground level as it wraps the neighborhood and joins the SR-417 right-of-way





A view of the proposed Brightline Train's concrete wall as it wraps the Kempton Chase community and joins the SR-417 right-of-way



A view of the proposed Brightline Train's concrete wall as it wraps the Kempton Chase community and joins the SR-417 right-of-way



The proposed Brightline Train will run along a wall approximately 30 feet above this Heather Glen apartment complex located off of Town Loop Boulevard

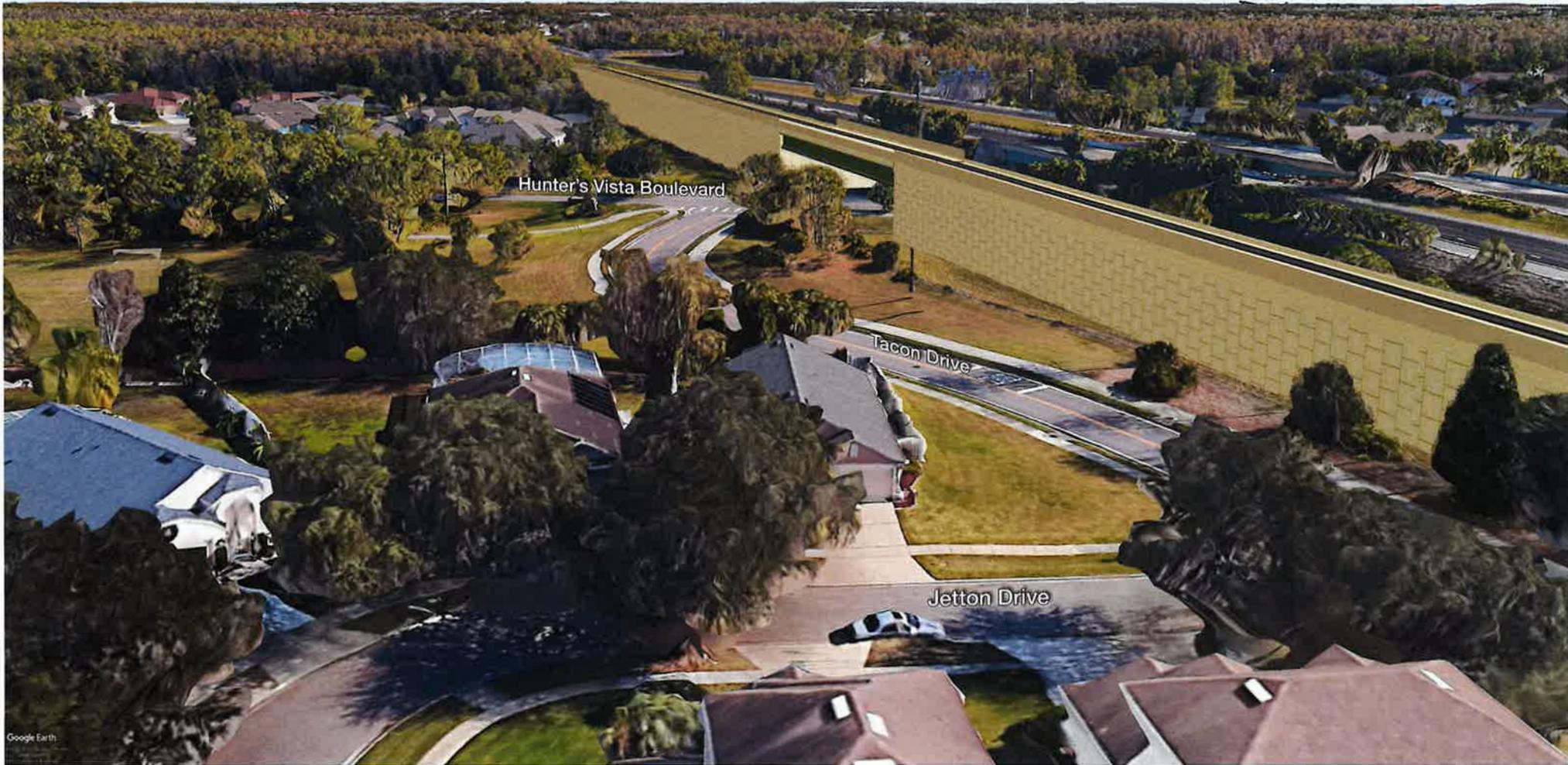
A view of the proposed Brightline Train's elevated wall as it runs adjacent to Hunter's Creek Middle School and crosses 30 feet above Town Loop Boulevard



A view of the proposed Brightline Train's elevated wall as it crosses 32 feet above Hunter's Vista Boulevard. The 15% completed plans show the proposed Hunter's Creek Station on top of the wall immediately adjacent to homes on Islamorada Drive



A view of the Brightline Train's elevated wall as it crosses 30 feet above Hunter's Vista Boulevard. It runs adjacent to Tacon Drive and descends to just above ground level at West Creek Elementary School





Town Loop Boulevard

Hunter's Creek Middle School









Hunter's Vista Boulevard



Islamorada Drive





Hunter's Vista Boulevard



Islamorada Drive

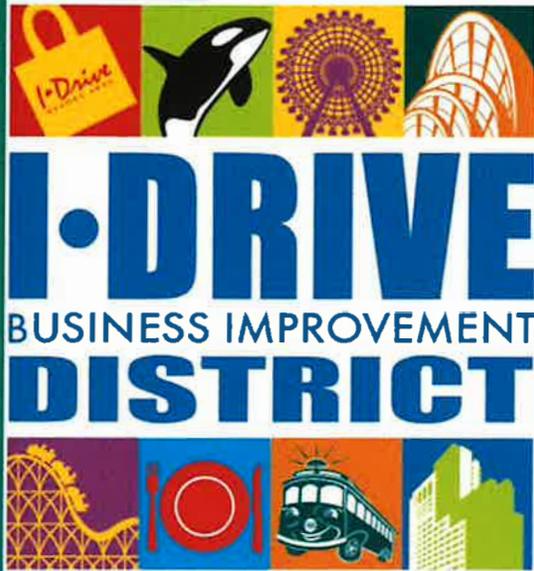
**EXHIBIT 8**

## **Drone Videos – YouTube**

International Drive Resort Area Chamber of Commerce

[https://www.youtube.com/channel/UCwlg\\_Wo2HyLtDCu1a3jplA](https://www.youtube.com/channel/UCwlg_Wo2HyLtDCu1a3jplA)

**EXHIBIT 20**



# INTERNATIONAL DRIVE

## ECONOMIC IMPACT ANALYSIS

2019



# ABOUT THE DISTRICT

The International Drive Master Transit and Improvement District was created on November 10, 1992 as a Business Improvement District (BID) under a public-private partnership between the I-Drive business community, Orange County Government and the City of Orlando.

The I-Drive Business Improvement District was created to provide services such as transportation, capital improvements, public safety, marketing, promotions, clean teams, streetscape enhancements and representation to state and local governments. The BID contributes to the current and future economic development of the International Drive Resort Area!

## MEET OUR LEADERS

### The International Drive Business Improvement District Governing Board

The Board is comprised of three members of local government: two members of Orange County and one member from the City of Orlando. Current Board Members are:



**Chairperson:**  
The Honorable Jerry Demings  
Orange County Mayor



**Orange County:**  
Commissioner Victoria Siplin  
Orange County – District 6



**City of Orlando:**  
Commissioner Bakari F. Burns  
City of Orlando – District 6

### The International Drive Business Improvement District Advisory Board

The District is served by a five-member Advisory Board: three members are appointed by Orange County and two are appointed by the City of Orlando. Members must be a District property owner, an owner-appointed representative, or an employee of a property owner.

#### Chairperson



Ms. Sibille Pritchard  
Vice President  
Orlando Plaza Partners

#### Other Members



Mr. Harris Rosen  
President  
Rosen Hotels & Resorts



Mr. Joshua Wallack  
Chief Operating Officer  
Mango's Tropical Cafe



Mr. Russ Dagon  
Senior Vice President  
of Resort Development  
Universal Orlando  
Creative



Mr. Marco Manzie  
President  
Paramount  
Hospitality Group

#### District Staff



Ms. Luann Brooks  
Executive Director  
I-Drive Business  
Improvement District



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# HIGHLIGHTS...2019

- **15.3 million** overnight & day visitors... (up from 14.8 million visitors in 2018)
- Total assessed value **\$14.7 BILLION**... (up from \$13.6 billion in 2018)
- Property taxes were \$228 million... (up from \$210.7 million in 2018)
- Sales tax collected \$530.1 million
- TDT collections were \$126.4 million
- Visitors spent \$8.2 billion
- **75,000+** full, part-time & seasonal jobs
- 132 properties – 53,015 individual accommodations (represents 42% of the tri-county region)
- 1,800 individual businesses
- **69.7 million square-feet** of Commercial Space
- Home to 22,357 residents housed in 12,742 units
- Home to the **2nd** largest convention center in the country
- Home to UCF Rosen College of Hospitality Management - the largest facility of its kind ever built for hospitality management education and is ranked in the Top 5 in the world



Orange County Convention Center



Hotel Front Desk Associate



The Courtney at Universal Boulevard Apartments

# EXECUTIVE SUMMARY

The International Drive Resort Area is one of the most visited destinations in the world and an important economic hub for Orange County, the City of Orlando, and the Metro Orlando region. The purpose of this project was to analyze the area's economic impact by delving into its current conditions, assessing the actual number of people visiting the area, and calculating its overall influence on the economy. This document is divided into three main parts: existing conditions, visitation and fiscal analysis profile, and economic impact model simulations.

The existing conditions analysis found that the resort area has a diversity of commercial, institutional and residential uses within its boundaries. These include over 69.7 million square feet of commercial space, 132 accommodation properties, the nation's second largest convention center, and a major educational institution. International Drive is also home to 1,800 businesses that employ over 75,000 people. These include the office headquarters of three national/international companies: Marriott Vacations Worldwide, SeaWorld Parks and Entertainment, and Wyndham Vacation Ownership. Long thought as only a job center, International Drive is also home to more than 22,000 housed in over 12,500 housing units. Finally, about 25% of the resort area's land is still vacant.

Most, if not all, of International Drive's economic activity is the result of tourists visiting the area. This study estimates that 15.3 million people visited the resort area in 2019 based on regional visitation and hotel occupancy data. Most of these visitors stayed overnight (64%) and the vast majority of them came for leisure purposes.

International Drive visitors spent about \$8.2 billion on transportation, lodging, food, entertainment and shopping in 2019. This visitor spending has an economic ripple effect on both Orange County and Metro Orlando's economy.

This positive economic impact will continue as there are more than 50 new projects scheduled to be completed within the next six years. They represent almost \$2 billion in new investment coming to Orange County. These construction costs were used to determine the economic impact of these projects to the county and regional economies. According to REMI, these new development projects will add more than 3,800 jobs in Orange County. They will also generate about \$525 million in sales and \$187 million in personal income. They will also add close to \$308 million to the county's gross regional product. Metro Orlando would add more than 4,400 positions, \$604 million in sales, and \$283 million in personal income. This new construction will also increase Metro Orlando's gross regional product by more than \$350 million per year.

# INTRODUCTION

Since the opening of Disney World in 1971, tourism has become the most important and largest generator of jobs in the Metro Orlando region. The high economic impact of this industry can be seen not only in the high number of people employed by the hotels and theme parks, but it also results in positions and investment in other sectors of the economy such as retail, construction, transportation, and professional services. The growth in the number of visitors, 75 million in 2019, and recent major investments by the public and private sector should help to keep the vibrancy in this industry.

One of the most visited tourist corridors in Metro Orlando is the International Drive Resort area (I-Drive). Home to the nation's second largest convention center and six of the world's most visited theme parks, I-Drive is one of the country's premiere tourist activity centers. Recent developments will help to solidify the corridor's competitiveness. The Orange County Convention Center just completed a new campus master plan that will help to upgrade its facilities. Orange County Government in partnership with the private sector has developed a new Strategic Vision Plan for the section of International Drive between Sand Lake Road and the Beachline Expressway. The strategies developed through this plan will help to create a more walkable and cohesive destination. These and other activities have renewed interest in redeveloping old sites into new attractions all around the district. These new investments bode well for the future of the I-Drive resort area.

Despite all the investment and careful planning put on the I-Drive area through the years, there have never been any specific efforts to calculate the economic impact that this area has on both Orange County and Metro Orlando. This study is the first attempt to do just that. The International Drive Resort Area Economic Impact Analysis is divided into three sections. The existing conditions analysis provides an overview of the area's land use, infrastructure, demographic, and economic characteristics. This is followed by a tourism activity and fiscal profile that summarizes business and revenue data collected by government and private organizations. Finally, the East Central Florida Regional Planning Council (ECFRPC) used the REMI Policy Insight model to calculate the economic value of I-Drive to the region and quantify the impact of the proposed future investments.

## Brief History of the I-Drive Resort Area

In 1965, Walt Disney announced that it will build a new theme park south of Orlando. Around this time, Orlando attorney and developer Finley Hamilton paid \$90,000 for ten acres of vacant land north of Sand Lake Road and east of I-4 where he built the Hilton Inn South. The actual International Drive was not built until 1972, when Hamilton and RF Raidle's Major realty paved an 1 1/2 mile stretch connecting Kirkman and Sand Lake roads. It was named International Drive because it "sounded important". The 1970s brought other important events to the resort area including the opening of the Sea World and Wet 'n Wild theme parks and the approval from Orange County voters to use a 2% hotel room tax to build the Orange County Convention Center.



International Drive- 1978

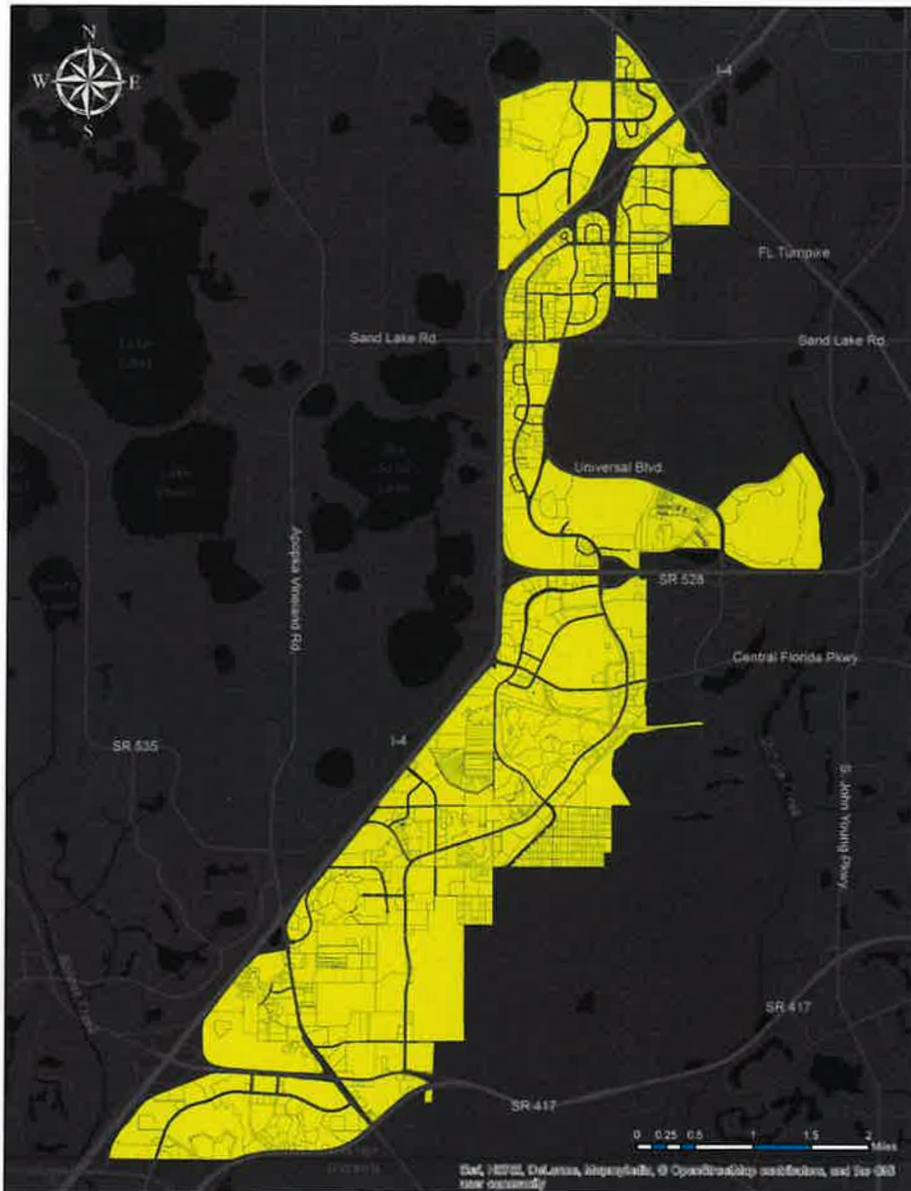
Source: International Drive Improvement District

The convention center was inaugurated in 1983, and its subsequent expansions have spurred the development of multiple hotels and commercial projects along the resort area. One of the most significant investments was the opening of the Universal Studios theme parks in the 1990s. Today the I-Drive Resort area is one of the most visited tourist corridors in the world. More detailed information about the history of International Drive can be found at the I-Drive Improvement District website at: <http://www.idrivedistrict.com/district-info/history.asp>

# STUDY AREA BOUNDARY

The study area boundaries encompass several important tourist hubs. The first one is the Universal Studios Resorts area, which starts south of Vineland Road and follows Kirkman Road south to the Sand Lake Road interchange. The Florida Turnpike and the Turkey Lake road delimit the east and west borders.

After this the study is framed by International Drive starting from West Oak Ridge Road to the Orange-Osceola County line. To the east, Universal Boulevard also serves as a primary north-south corridor. Sand Lake Road is an important east-west road that divides the study area between the City of Orlando and unincorporated Orange County. The study area continues south of the Beachline Expressway and includes SeaWorld Orlando, Aquatica, Discovery Cove, a number of vacation resorts as well as housing for much of the supporting service industry professionals that work within the corridor.



Source(s): Orange County Property Appraiser, ECFRPC Research

# I-DRIVE EXISTING CONDITIONS ANALYSIS

The purpose of the Existing Conditions Analysis is to provide an overview of the current conditions of the I-Drive Resort Area. This base information will serve as a background for helping the public understand the economic impact of the area. The existing conditions analysis includes a land use analysis and a business and industry profile.

The Land Use Analysis provides an overview of the major current land uses found within the International Drive area. This analysis was completed using Geographic Information Systems (GIS) software based on parcel information from the Orange County Property Appraiser's Office. For this section, the East Central Florida Regional Planning Council (ECFRPC) also used the U.S Census American Community Survey to identify the major demographic characteristics of the people living within International Drive. Finally, the report provides an overview of current and new transportation projects that will benefit the resort area.

The second part is a Business and Industry Profile that analyzes the distribution of economic activity in the I-Drive area using the number and type of establishments and number of employees. For this part of the report, the ECFRPC used the Infogroup database, which includes information on more than 25 million establishments across the United States.

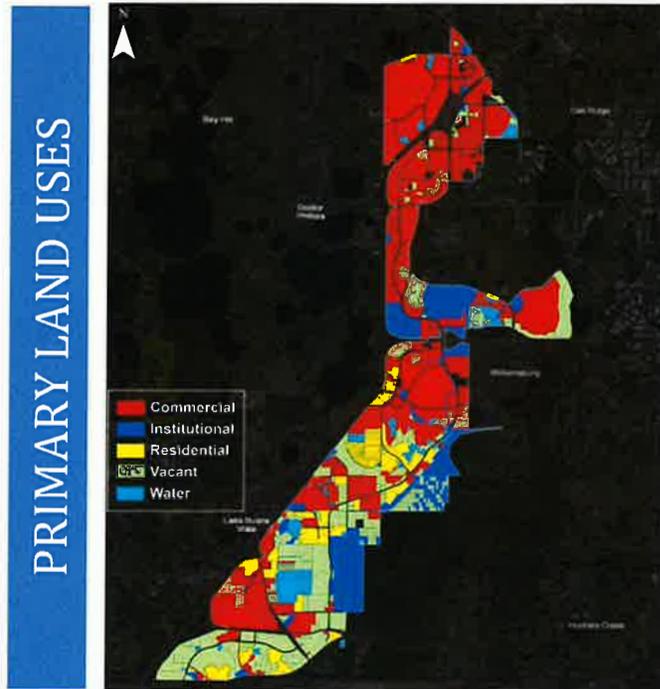
More information about the methodologies and findings of the existing conditions analysis is provided on the following pages.



International Drive

# LAND USE ANALYSIS

The I-Drive Resort Area has a diverse mix of land uses. For the purpose of this discussion, the ECFRPC classified all district properties into four general land use categories: Commercial, Vacant, Institutional and Residential.



Source(s): Orange County Property Appraiser, ECFRPC Research

Approximately half of the acres within the study area can be classified as commercial. This land use category is comprised of several non-residential uses including hotel and time share properties (accommodations), retail, office, industrial developments and commercial amusement attractions. There are more than 4,000 acres of commercial land within I-Drive.

The second largest category is Vacant Land, which includes properties that are currently undeveloped or used for agricultural purposes. Vacant land encompasses about 24.7% of all land within the study area. In addition to these vacant properties, the I-Drive Resort area contains over 576 acres of land classified as Water.

Institutional uses include all land owned by federal, state and local governments, civic, educational and non-profit organizations. These uses comprise over 13% of the total study area.

Finally, the I-Drive Resort Area is home to several single-family homes and multi-family residential developments. These residential properties account for 8% of all land within the study area.

The next pages of the report discuss these land use categories in more detail.

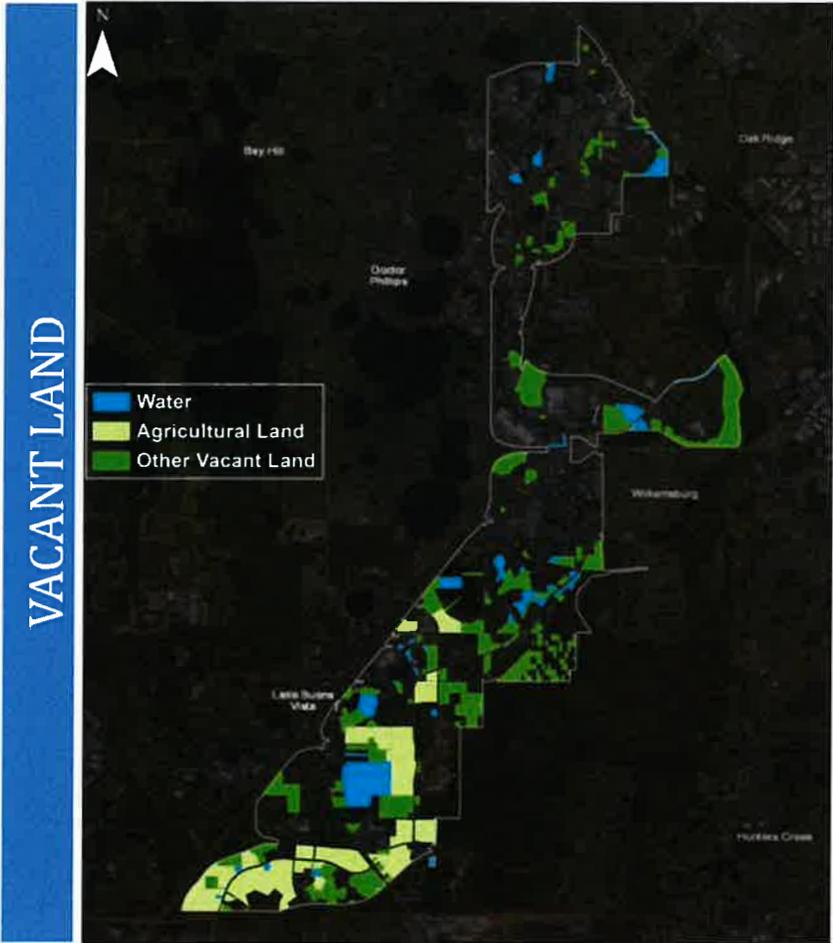
Project Area Summary by Land Use as of 2020		
Land Use Category	Acres	% Study Area
Commercial	4,044	47.1
Vacant	2,120	24.7
Institutional	1,153	13.4
Residential	698	8.1
Water	576	6.7
<b>TOTAL</b>	<b>8,591</b>	<b>100</b>

# VACANT LAND

There are over 2,000 acres of vacant land within the I-Drive Resort area. This includes over 800 acres of agricultural land, most of which is located south of the Beachline Expressway (S.R. 528). Because they are situated near a dynamic tourist district, these parcels will probably urbanize within the next decades. In fact, most of the land is currently used for passive agricultural uses such as timberland and pastures rather than active farming. The rest of I-Drive’s vacant land is comprised of smaller undeveloped parcels located within the urbanized parts of the resort area.

Largest Property Owners by Acreage as of 2020	
Organization	Acres
GCB Associates LLC	469
Universal City Development Partners LTD	162
WGMLL Investments LTD ½ Int	168
AG-RW Grande Pines LLC	59
Shingle Creek Co-Owners LLC	52

The number of parcels, their size and ownership are important variables when discussing the development potential of vacant land within the District. There are approximately 305 vacant parcels within the I-Drive Resort Area. While the average size of these properties is seven acres, more than half of these parcels are less than five acres. The vast majority of these small parcels are owned by single-property owners, which could be a deterrent for future development. The current effort by the Orange County Planning Division to densify the I-Drive Resort Area will help to address this dilemma. On the other hand, there are more than 70 large parcels located within the district that could house large developments. There are five organizations that own 43% of all vacant land in the study area.



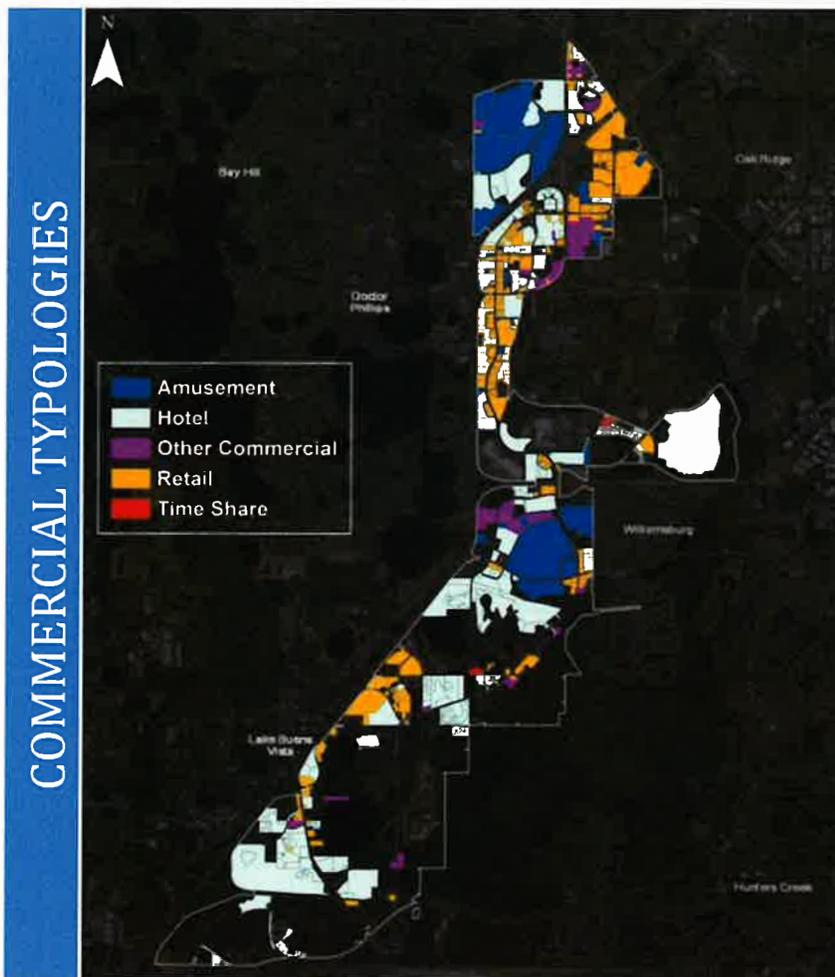
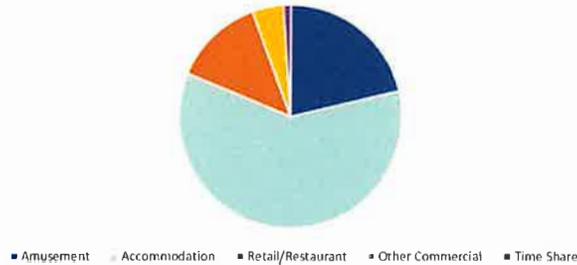
Source(s): Orange County Property Appraiser, ECFRPC Research

# COMMERCIAL LAND

With close to 69.7 million square feet of commercial space, the I-Drive Resort Area is one of the busiest commercial districts in Metro Orlando. The dominant commercial types within this tourist corridor are Accommodations, Commercial Amusements and Retail. Accommodation uses comprise 60% of all commercial square footage within the study area. This category is comprised of hotels and time share properties distributed throughout the district. Commercial Amusements (21.3%) includes theme parks and other tourist attractions. Retail and Restaurants comprise another 13.1% of building space. Finally, there is about 3.9 million square feet of office space and industrial space in the study area. Together, these uses account for about 5.5% of all commercial uses.

The following pages provide more information about these commercial uses.

Percent Total Acreage by Commercial Use



Source(s): Orange County Property Appraiser (2016), ECFRPC Research

# THEME PARKS & MAJOR ATTRACTIONS AS OF 2019

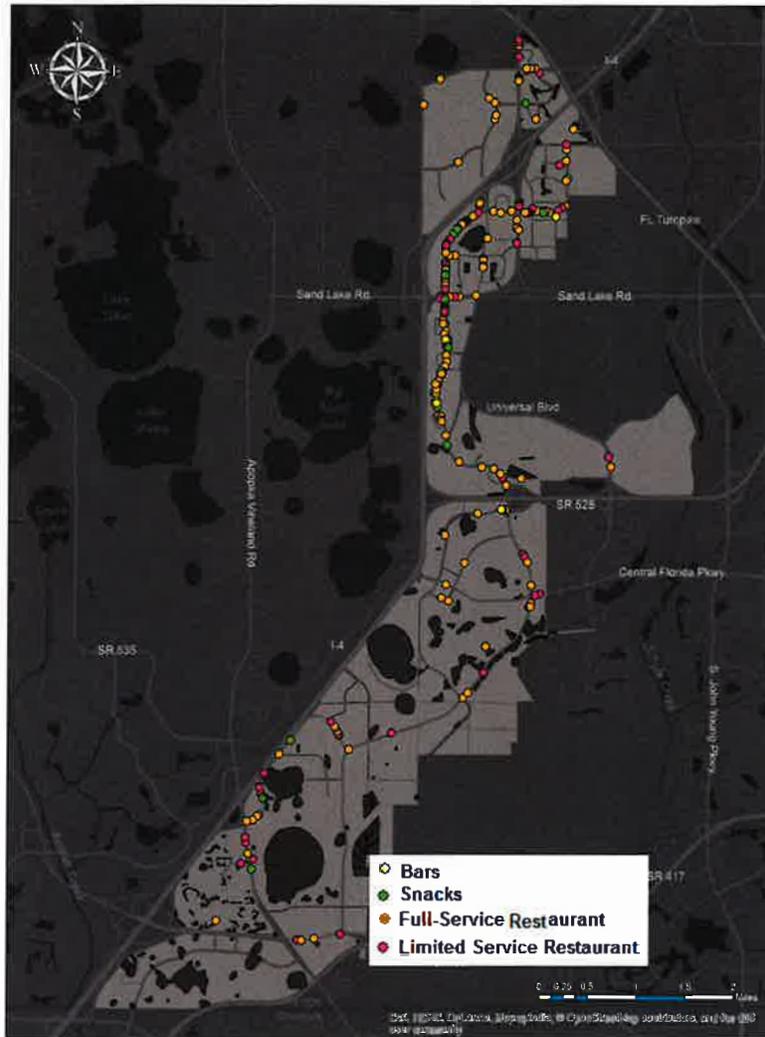


## Theme Parks & Attractions

1. Islands of Adventure
2. Universal City Walk
3. Universal Studios
4. Starflyer
5. Volcano Bay
6. Fun Spot America
7. SkyPlex (planned)
8. Mango's Tropical Cafe
9. Ripley's Believe It Or Not
10. ICON Park
11. WonderWorks
12. Pointe Orlando
13. Aquatica
14. Sea World
15. Discovery Cove



# RESTAURANTS & BARS



Source(s): Infogroup; ECFRPC Research

## Popular Restaurants as of 2019

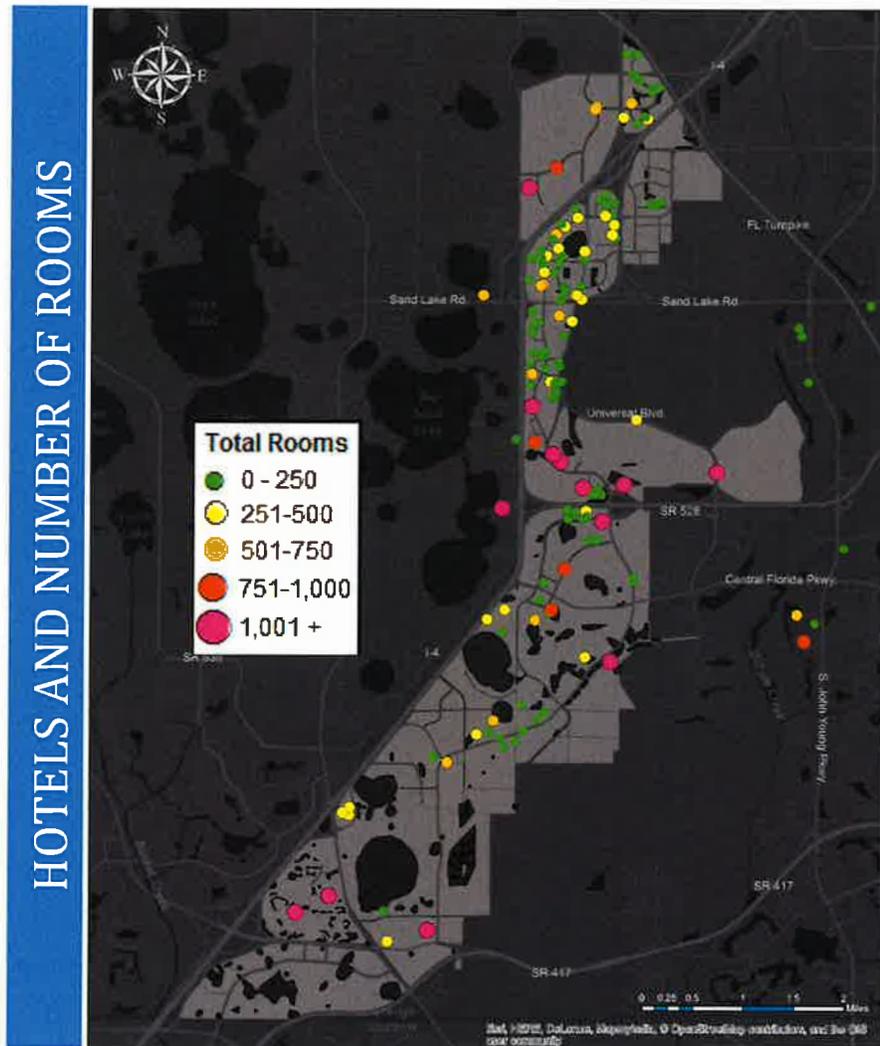
<i>Bahama Breeze</i>	<i>Ford's Garage</i>	<i>Shake Shack</i>
<i>BB King's Blues Club</i>	<i>Hard Rock Café</i>	<i>Shogun Japanese Steakhouse</i>
<i>Benihana</i>	<i>Hash House A Go Go</i>	<i>Sugar Factory</i>
<i>BJ's Restaurant</i>	<i>Hooters</i>	<i>Sushiology</i>
<i>Black Angus Steakhouse</i>	<i>IHOP</i>	<i>Sweet Tomatoes</i>
<i>Bloodhound Brew</i>	<i>Itta Bena</i>	<i>Tabla Indian Chinese &amp; Thai</i>
<i>Buffalo Wild Wings</i>	<i>Jack's Place</i>	<i>Tapa Toro</i>
<i>Café Tu Tu Tango</i>	<i>Joe's Crab Shack</i>	<i>Taverna Opa</i>
<i>Carrabba's</i>	<i>Kobe Japanese Steakhouse</i>	<i>Texas de Brazil</i>
<i>Charley's Steakhouse</i>	<i>Longhorn Steakhouse</i>	<i>TGI Friday's</i>
<i>Chili's Bar and Grill</i>	<i>Maggiano's</i>	<i>Thai Thani</i>
<i>Chuy's Tex-Mex</i>	<i>Mango's Tropical Cafe</i>	<i>The Capital Grille</i>
<i>Cooper's Hawk</i>	<i>Marlow's Tavern</i>	<i>The Oceanaire Seafood Room</i>
<i>Cuba Libre</i>	<i>Mellow Mushroom</i>	<i>Tilted Kilt</i>
<i>Dave &amp; Buster's</i>	<i>Miller's Ale House</i>	<i>Tin Roof</i>
<i>Del Frisco's</i>	<i>Olive Garden</i>	<i>Tokyo Sushi</i>
<i>Denny's</i>	<i>Outback Steakhouse</i>	<i>Tony Roma's</i>
<i>Everglades Restaurant</i>	<i>Perkins Restaurant &amp; Bakery</i>	<i>Twin Peaks</i>
<i>FishBones</i>	<i>Pio Pio</i>	<i>Urban Tide</i>
<i>Fogo de Chao</i>	<i>Ponderosa Steakhouse</i>	<i>Yard House</i>

# ACCOMMODATIONS

The I-Drive Resort area boasts low-price hotels, affordable hotels, luxury resorts, and vacation ownership units. In 2019, the area had 132 properties with a total of 53,015 rooms, placing the corridor among the densest in Central Florida<sup>6</sup>. Hotel sizes and typologies range from small motels with just a few hundred rooms to large resorts exceeding 1,000 rooms<sup>6</sup>.

## Largest Accommodations by Number of Rooms as of 2019

Westgate Lakes – 1,990 Rooms	Sheraton Vistana Villages I-Drive – 1,669 Rooms
Orlando World Center Marriott – 2,008 Rooms	Rosen Inn at Pointe Orlando – 1,020 Rooms
Cabana Bay Beach Club – 2,200 Rooms	DoubleTree Orlando SeaWorld – 1,042 Rooms
Hyatt Regency Orlando – 1,641 Rooms	Royal Pacific – 1,000 Rooms
Marriott's Grande Vista – 1,616 Rooms	Rosen Plaza – 800 Rooms
Rosen Shingle Creek – 1,501 Rooms	Hilton Grand Vacations SeaWorld – 787 Rooms
Hilton Orlando – 1,424 Rooms	Renaissance Orlando at SeaWorld – 781 Rooms
Caribe Royale – 1,335 Rooms	Portofino Bay Hotel – 750 Rooms
Rosen Centre Hotel – 1,334 Rooms	Universal's Surfside Inn & Suites – 750 Rooms



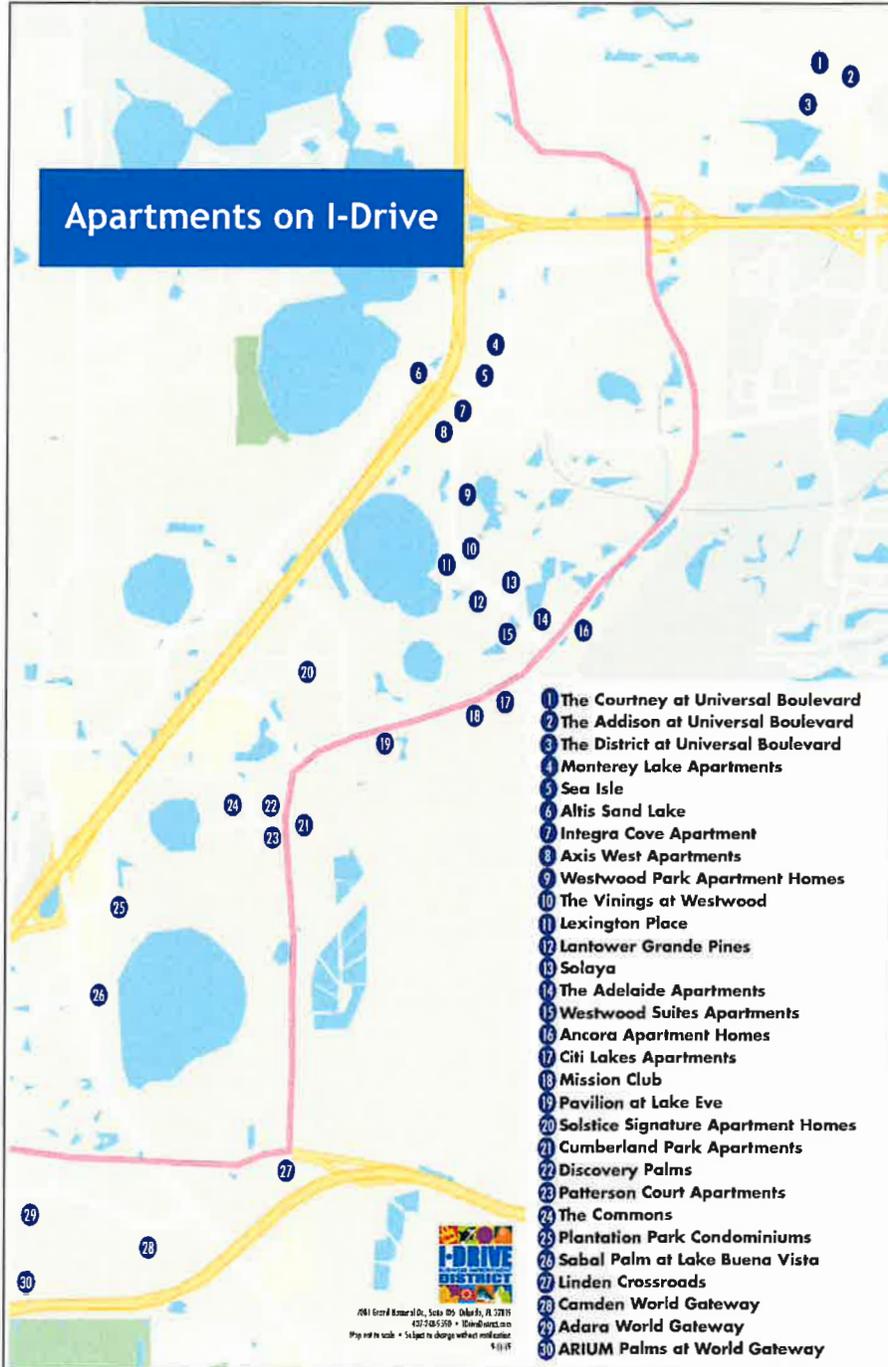
Source(s): Orange County Property Appraiser (2016), FGDL; IDID; ECFRPC Research

Source Citations: 1 – Orange County Property Appraiser; 2 – InfoGroup; 3 – Orange County GIS/Government; 4 – VisitOrlando; 5 – U.S. Census Bureau; 6 – I-Drive Improvement District --- All hotel data provided by IDID

# RESIDENTIAL LAND

As of 2019, there were over 12,742 total residential units within the I-Drive Resort Area. Apartment complexes are the most common housing type followed by Condominiums. There are also 47 single family homes located within the district, most of which are lake front houses.

I-Drive Resort Area Housing Units by Type	
Residential Type	Housing Units
Apartments	11,120
Condominiums	1,575
Single Family Homes	47
<b>Total Housing Units</b>	<b>12,742</b>

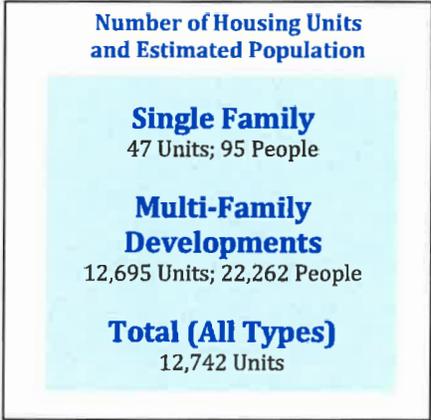


# I-DRIVE DEMOGRAPHICS AS OF 2019

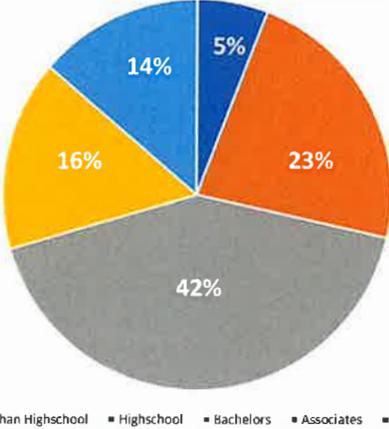
The ECFRPC used information from the U.S Census American Community Survey and the Orange County Property Appraiser to build a population profile for the I-Drive Resort Area. There are ten different Census Block Groups (the smallest geographical unit for which the bureau publishes sample data) within the resort area. However, the boundaries of most of these block groups extend far beyond the study area borders because of the commercial nature of the I-Drive corridor. Therefore, their total population counts include people that live outside the area of interest. To address this situation, the ECFRPC decided to use Orange County Property Appraiser data to get a more realistic population count.

First, the ECFRPC identified the location of residential land within the study area using DOR codes and GIS software. The Orange County Property Appraiser website was then used to identify the number of residential units available on the multi-family developments (condominiums, apartments, and student housing). To calculate the population counts, the ECFRPC multiplied the number of housing units by the average household size for each Census block group. Finally, the ECFRPC applied Orange County's housing vacancy rate (13.5%) to get the final number of people. Based on this methodology, the ECFRPC estimates that there are more than 22,350 people living within the I-Drive resort area. Most of these people are concentrated on the west side of the study area, near the Lake Bryan/Lake Ruby areas. The average household size for the area ranges from 1.77 to 3.26 persons per household, which is smaller than the county average.

The ECFRPC used the American Community Survey to get additional demographic characteristics for the population living within the I-Drive Resort area. Not surprisingly, the majority of the people residing here work for the Leisure and Hospitality Industry (41%). The educational attainment of this population tends to be relatively high, with 70% of people over age 25 having at least an Associate's Degree. This might be partly explained by the presence of the University of Central Florida's (UCF) Rosen College of Hospitality Management, which is located within the study area.



## Educational Attainment



Source(s) for all tables on this page: US Census Bureau, ECFRPC, Orange County PAO

# INSTITUTIONAL LAND

Institutional land includes all properties owned by government agencies (federal, state, and local), infrastructure easements, land use for mitigation purposes, and conservation areas such as wetlands. These uses account for 1,153 acres of land or approximately 13% of the total study area as of 2019. The Orange County Board of County Commissioners, the Valencia Water Control District and the South Florida Water Management District are the largest owners of Institutional land within the resort area.

The largest institutional uses within the resort area are the Orange County Convention Center (OCCC) and the UCF's Rosen College of Hospitality Management. Owned and operated by Orange County, the OCCC is one of the largest economic engines in the region. The facility includes two buildings (West and North/South) that host a variety of events catering to thousands of visitors each year. More information about the OCCC is provided on the next page. The Rosen College campus is situated on the east side of the study area. The 159,000-square foot building opened in early 2004 and is the largest, most advanced facility ever built for hospitality management education in the United States. The school's wide array of academic programs includes Hospitality Management, Event Management, Restaurant & Food Service Management, and Entertainment Management.

## **Orange County Convention Center**

**2,053,820** Sq. Ft. Exhibition Space  
**2** General Assembly Areas  
**2,643-Seat** Theater  
**3** Business Centers  
**106-Seat** Lecture Hall  
**74** Meeting Rooms  
**3** Full-Service Restaurants  
**232** Breakout Rooms

## **UCF Rosen College of Hospitality**

**22** High-Tech Classrooms  
**1** Executive Education Center  
**200-Seat** Training Dining Room/Bar  
**1** Beer and Wine Laboratory  
**2** Test Kitchens  
**400-Seat** Auditorium



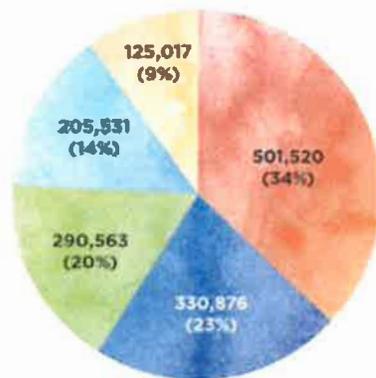
# ORANGE COUNTY CONVENTION CENTER (OCCC)

The Orlando area started marketing itself as a convention destination in 1969. However, the groundwork for the future Convention Center did not start until eight years later when the Florida Legislature allowed local jurisdictions to impose a Tourism Development Tax or hotel room tax. That year the Orange County Board of County Commissioners created the Tourism Development Tax Council to help define the proposed uses for this new tax. In 1978, Orange County voters approved the use of this money to build a new Convention and Civic Center.

Since its opening in 1983, more than 32 million people have attended events at the OCCC making it one of the most important anchors of the I-Drive Resort area<sup>7</sup>. It is the second largest convention center in the United States with over 2 million square feet of exhibition space<sup>7</sup>. According to the OCCC annual report, the convention center hosted 170 events that brought more than 1.5 million people to the I-Drive area in fiscal year 2018-2019<sup>7</sup>.

The OCCC is currently in the midst of implementing a \$605 million Capital Improvement Plan to remain as one of the most competitive facilities in the nation<sup>7</sup>. The plan calls for the construction of two projects that will improve and enhance the North-South Building:

- Convention Way Grand Concourse – an enclosed connection between the North and South concourses that includes additional meeting space and an 80,000-square-foot ballroom with a grand entrance to the North-South building along Convention Way<sup>7</sup>.
- Multipurpose Venue – a 200,000-square-foot, flexible, divisible, column-free space with a combination of retractable and floor seating to accommodate between 18,000-20,000 guests. This project will also incorporate connectivity between the North and South concourses<sup>7</sup>.



## EVENT CATEGORIES

FISCAL YEAR 2018-2019 MARKET MIX MEASURED BY ATTENDANCE

1,453,807 attendees

- Association (34%)
- SMERF Market (23%)
- Consumer (20%)
- Corporate (14%)
- Trade Show (9%)

SMERF = Social, Military, Educational, Religious and Family

## FISCAL YEAR 2018-2019 EVENT CATEGORIES – MEASURED BY NUMBER OF EVENTS

170 TOTAL EVENTS



Source Citations: 1 – Orange County Property Appraiser; 2 – Infogroup; 3 – Orange County GIS/Government; 4 – Visit Orlando; 5 – U.S. Census Bureau; 6 – I-Drive Improvement District; 7 – OCCC; Chart data by OCCC

# TRANSPORTATION

I-Drive's road network is going through several improvements that will ease traffic flow, provide more transportation options to visitors & residents, and create a more pedestrian friendly environment. For example, a traffic flow and pedestrian enhancement project in the northern portion of the study area was recently completed and four others are currently ongoing. These projects include the I-4 Ultimate Interchange-Grand National Drive Overpass, widening International Drive at Westwood Boulevard, improvements to the Sand Lake Road-John Young Parkway interchange and an extension of Destination Parkway. In addition, sidewalk additions to Sea Harbor Drive are in the design phase.

Two pedestrian projects have been planned by the Orange County Planning Division. One project is a conceptual pedestrian bridge at Sand Lake Road at the intersection of International Drive as well as planned transit lanes along Universal Boulevard and I-Drive.

Finally, the I-4 Ultimate Improvement Project will help build the Grand National Drive overpass as well as interchange improvements that will alleviate traffic at the Kirkman Road exit.



I-Drive/Sand Lake Road Pedestrian Bridge



I-Drive Premium Transit Study (concept photo)



I-4/Sand Lake Road Interchange (concept photo)

Recent and Under Construction Transportation Projects as of 2019		
Project	Status	Completion Date
International Drive Widening (Westwood-Westwood)	Completed	2019
John Young Parkway/Sand Lake Road Interchange	Completed	2019
Beachline Widening	Completed	2019
Sea Harbor Drive Sidewalk Project	Completed	2019
Kirkman Road Pedestrian Bridge	Ongoing	2020
Sand Lake Road Improvement Project	Ongoing	January 2021
I-Drive Premium Transit Study	Design Phase	Spring 2021
Kirkman Road Resurfacing Project	Ongoing	Fall 2021
I-Drive/Sand Lake Road Pedestrian Bridge Feasibility Study	Feasibility Study	2021
International Drive Dedicated Transit Lanes	Ongoing	Summer 2022
Sand Lake Road/I-4 Interchange	Design Phase	2024
I-4 Ultimate Project	Ongoing	T.B.D.
Kirkman Road Extension	Design Phase	T.B.D.

# I-RIDE TROLLEY

The I-Ride Trolley provides transit services to visitors and residents along International Drive and Universal Boulevard. Trolleys travel throughout the International Drive Resort Area serving over 100 convenient stops approximately every 20 minutes. In 2019 the trolley system had over 1.3 million trips. The trolley offers single-trip passes for \$2.00 (\$1 for children and \$0.25 for senior citizens) and daily passes for \$5.00. Visitors can also get extended passes lasting 14 days for \$18.00, or day-based passes.

A “park once” philosophy is planned for the future, whereas guests park once and utilize the entire corridor via the transit system. The Orange County Planning Division has unveiled plans for retrofitted street sections along Universal Boulevard and International Drive that would make the trolley system even more impactful for residents and visitors in the future. Dedicated transit lanes and other features have been discussed for the corridor alongside bicycle and pedestrian improvements to create a more urban and traversable corridor.



**Daily Hours: 8:00 a.m. - 10:30 p.m.**  
**Customer Service: 407-354-5656**  
[www.IRideTrolley.com](http://www.IRideTrolley.com)





- I-RIDE Trolleys operate daily, 8:00am to 10:30 pm
- Single Cash Fare \$2.00 per ride
- Kids Cash Fare \$1.00 (ages 3-9 with paying adult)
- Senior Cash Fare \$0.25 per ride (65 and over)
- Exact Change is Required.
- All Trolleys are green in color on both Red and Green Lines.
- Red Line Route Trolleys generally arrive at each stop approx. every 15-20 minutes.
- Green Line Route Trolleys arrive approx. every 30 minutes.
- Wait times for Trolleys may vary with traffic and season.
- Transfers are FREE! Transfer between lines at the designated transfer stops, which are represented on the map as stars.
- Unlimited Ride Passes:
  - One Day Pass: \$ 5.00 per person
  - Three Day Pass: \$ 7.00 per person
  - Five Day Pass: \$ 9.00 per person
  - Seven Day Pass: \$12.00 per person
  - Fourteen Day Pass: \$18.00 per person
 Passes are not sold on Trolleys. Passes are consecutive day use.

**Where's My NextTrolley**

Get your predicted trolley arrival times by texting the Trolley Stop code to 41411. Stop Codes are located on the map at each Trolley Stop. Or via [www.IRideTrolley.com](http://www.IRideTrolley.com)



Ask your Trolley driver or your hotel guest service desk for the International Drive Resort Area **Official Visitors Guide & I-RIDE Trolley Map.**

 [www.InternationalDriveOrlando.com](http://www.InternationalDriveOrlando.com)  
 10-23-19 I-Ride Trolley Fare, Route and hours subject to change.

# I-DRIVE 2040 VISION PLAN (ORANGE COUNTY)

## OVERVIEW

Recognizing the importance of creating a shared vision for the International Drive Area, Orange County Government created the **Steering Review Group (SRG) composed of I-Drive area stakeholders and landowners** who are committed to maintaining I-Drive as the world's premier global destination for tourism and family entertainment.

The SRG was tasked with crafting a comprehensive and cohesive plan for the Study Area along with implementation strategies and tools for consideration by the Board of County Commissioners (BCC). The I-Drive 2040 Vision was accepted by the BCC on November 3, 2015.

## VISION PLAN

With hundreds of world-famous retailers and restaurants, thousands of stunning hotel rooms and contemporary resorts, dozens of family-oriented attractions and entertainment complexes, I-Drive accounts for a significant portion of Orange County's robust travel, tourism, and hospitality sectors. The proposed plan for the Convention Plaza District will create a vibrant, dynamic and safe pedestrian-centered environment with dedicated transit lanes and sidewalk enhancements for local residents, conventioners and visitors alike.

## PROCESS

There are four pillars surrounding the completion of the visioning process including land development, regulatory components, parking and mobility. The 11-member SRG assisted in formulating the District's vision along with implementation alternatives.

The plan includes seven proposed sub-districts to meet the unique needs of each area including the famed Orange County Convention Center, retail and hospitality, entertainment, SeaWorld, Destination Parkway, Universal Boulevard and Rosen Shingle Creek.

## HISTORY

The 11-member SRG began meeting on a monthly basis in January 2015 with the mission of formulating a shared vision for the Convention Plaza District. The SRG was tasked with creating a cohesive plan for the Study Area along with implementation strategies and tools for consideration by the BCC. Parallel initiatives that will support the SRG vision include Comprehensive Plan amendments and updated development standards.

## CODE

The **I-Drive District Code** – adopted in February of 2017 – provides form-based standards to implement the I-Drive 2040 Strategic Vision. The code includes a Regulating Plan that establishes high density mixed-use development transects, as well as Special Zones for civic buildings and theme parks.

## CONTACT INFORMATION

For more information on the I-Drive Vision Plan please contact the Orange County Planning Division at 407-836-5600, press 5 for the Planning Division or email [Planning@ocfl.net](mailto:Planning@ocfl.net).



# BUSINESS PROFILE

To complete the I-Drive Resort Area economic impact study, the ECFRPC is using an industry cluster analysis methodology that identifies geographic concentrations of particular industries as well as explains the connections between these establishments. The I-Drive Resort area is anchored by three large theme parks (Universal Studios, Islands of Adventure and Sea World) and one of the nation's largest convention centers. These institutions receive millions of visitors each year that generate additional demand for other services including accommodations, dining, retail, transportation among others. This section of the report also provides an in-depth analysis of the economic and employment data for businesses and industries found in the I-Drive Resort area.

To complete this analysis, the ECFRPC used the Infogroup database to determine the number of businesses and employees located within the study boundaries. This information was complemented with other data sources such as the Orange County Property Appraiser's parcel data and internet searches. In additions to these sources, the ECFRPC used GIS software to depict industry concentration and employment across the study area. Finally, it provides general information about occupations and wages for the tourism industry.



As of January 2019

# INDUSTRY STRUCTURE

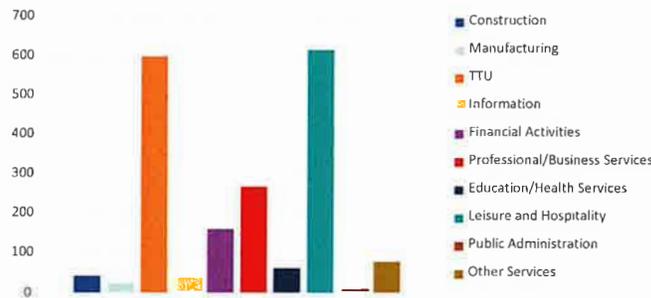
According to Infogroup, as of 2019, the resort area is home to more than 1,800 businesses that employ more than 75,000 people<sup>2</sup>. These businesses can be classified into ten groupings called economic super sectors, which are defined below:

- **Construction:** This sector is comprised of establishments engaged in the construction of buildings and infrastructure projects as well as the subdivision of land.
- **Manufacturing:** Establishments within the manufacturing sector use mechanical, physical, and chemical processes to transform materials and substances into new products.
- **Trade, Transportation, and Utilities (TTU):** This is one of the most comprehensive categories. It includes businesses that sell merchandise at the wholesale level, those that sell directly to the public (retailers), industries that transport people and cargo, store goods, and provide utility services to the public.
- **Information:** This category includes all businesses that create and disseminate informational and cultural products through print, broadcast, online, or other forms of telecommunications.
- **Financial Activities:** Often referred to by the acronym FIRE, this super sector includes all establishments engaged in the facilitation of financial transactions or that are involved in the renting, leasing and management of real estate properties and other equipment.
- **Professional and Business Services:** This category is comprised of businesses that provide highly specialized technical services, strategic management and leadership, and routine support activities for the day-to-day operations of other organizations.
- **Education and Health Services:** The establishments within this category provide a variety of services to individuals including instruction and training in a wide variety of subjects, medical care, and social welfare services.
- **Leisure and Hospitality:** This is the largest category in the I-Drive Resort area. It is comprised of businesses that provide cultural, entertainment, and recreational services to the public as well as lodging and prepared meals and beverages.
- **Other Services:** Businesses within this category provide repair and maintenance, personal care, and social advocacy services. This super sector also includes home businesses.
- **Government:** This category includes all federal, state, regional and local government offices and facilities.

## Examples of I-Drive Businesses by Super Sector

Most I-Drive establishments fall within two major supersectors: Leisure and Hospitality and TTU. Together these categories comprise 65% of all businesses within the International Drive Resort Area. Professional and Business Services and Financial Services comprise another 23% of all establishments within the resort area.

Number of Establishments by Industry Super Sector

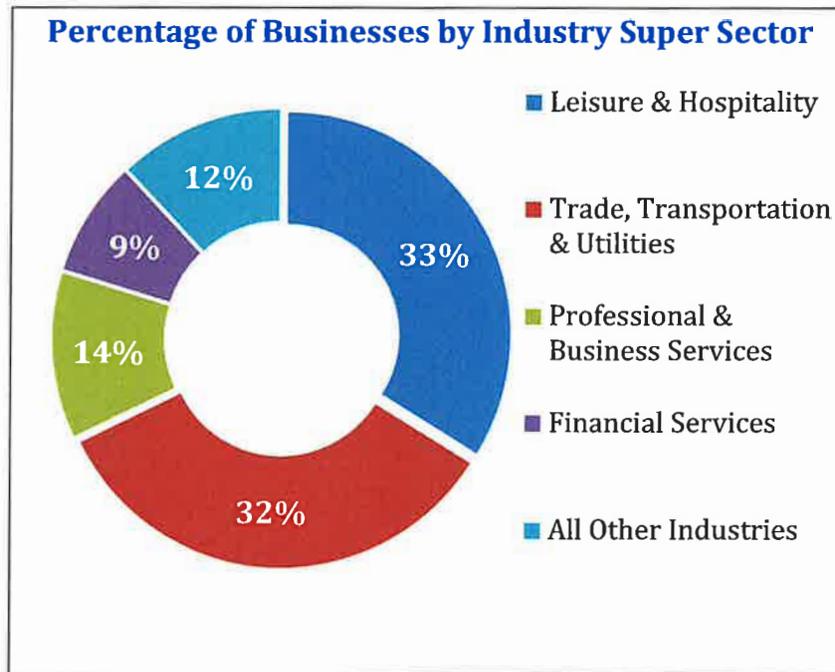


Examples of Businesses by Super Sector		
Super Sector	Total Establishments	Examples
20 - Construction	41	Building Contractors
30 - Manufacturing	23	Retail Bakeries, Tool and Die
40 - TTU	598	Charter Bus Companies, Clothing Stores
50 - Information	32	Newspapers, TV Stations
55 - Financial Activities	160	Insurance, Banks, Realtor Offices
60 - Professional/Business Services	267	Accountants, Engineers, Lawyers
65 - Education/Health Services	61	Higher Education, Doctor Offices
70 - Leisure and Hospitality	616	Hotels, Theme Parks, Restaurants
80 - Other Services	77	Auto Mechanics, Beauty Salon, Churches
92 - Public Administration	4	Government Offices

Source: InfoGroup, ECFRPC research

## Analysis

The high concentration of businesses in the Leisure and Hospitality super sector is not surprising, as this category includes all core tourism businesses: Theme Parks and Commercial Amusements (56), Hotels and Other Accommodation Places (168) and Restaurants (343). The chart on page 23 shows the distribution of these businesses within the I-Drive Resort Area.



Source(s): InfoGroup; ECFRPC Research

As of 2019

## PROFESSIONAL BUSINESS SERVICES AND FINANCIAL SECTORS

The Professional and Business Services super sector includes professional services offices, other business support services, and management companies.

According to Infogroup, as of 2019, there are more than 200 of these companies within the I-Drive Resort area<sup>2</sup>. Based on ECFRPC research, more than 50% of these companies supply services to the Leisure and Hospitality sector<sup>2</sup>.

The most important category is the Travel Arrangement and Reservation Services industry, which includes travel agencies, tour operators, convention and visitors' bureaus and similar organizations. It represents 30% of all the businesses within the Professional and Business Services super sector<sup>2</sup>. While there are several engineering, design and consulting firms that serve the hospitality industry, most of the other types of businesses located within the resort area are not tied to the tourism sector.

One of the most important establishment types within this super sector is corporate, subsidiary and regional management offices. These establishments are responsible for administering, overseeing, and managing large companies. There are three of these establishments located within the I-Drive Resort area: Marriott Vacations Worldwide, Wyndham Vacation Ownership, and SeaWorld Parks and Entertainment.



Marriott Vacations was formerly the timeshare division of Marriott International, but was spun off into its own company in 2011. It runs more than 60 resorts worldwide<sup>9</sup>. Wyndham Vacation Ownership, part of Wyndham Worldwide, manages more than 190 vacation ownership resorts across the world<sup>9</sup>.

SeaWorld Entertainment relocated from St. Louis in 2008, when it was still part of Busch Entertainment<sup>9</sup>. From its Orlando office, the company manages 10 theme parks across the United States including five in the Central Florida area.

Finally, there are more than 160 businesses within the Financial Services super sector located in I-Drive. 37% of these firms provide a variety of services to the hospitality industry and visitors including currency exchange, hotel and commercial property management and leasing, and passenger car rental. This last category is the most prevalent in I-Drive as several passenger car rental companies have operations inside the resort area's hotels.

# ORANGE COUNTY PUBLIC SERVICES

Orange County and the City of Orlando also benefit from the investments made to house I-Drive visitors in the form of public service fees. Based on data provided by the Orange County Development Services Office, businesses within the I-Drive Resort Area paid \$36.2 million in public service fees. This information was not available for the City of Orlando, which encompasses the northern part of the District.



**Orange County Fire Rescue**



**Orange County Sheriff**

The District operates its own Public Safety Program in cooperation with the Orange County Sheriff's Office and the Orlando Police Department to provide enhanced safety throughout the entire I-Drive District, seven days per week. Through the Sheriff's Office, the District funds the following assets:

- Assigned ten (10) additional deputies known as the Tourist Oriented Policing Squads (TOPS)
- Assigned five (5) District Engagement Officers (DEO's)

The District partners with the Orlando Police Department to hire off duty officers to patrol the City portion of the I-Drive District. The funding for all aforementioned assets is 100% contributed through the I-Drive District via a special assessment program.



**TOPS**



**DEO's**

# EMPLOYMENT BY SECTOR

Another way of analyzing industry structure is by studying the number of jobs by industry also referred to as employment share. According to Infogroup and ECFRPC research, as of 2019, more than 75,000 people work within the International Drive Resort area<sup>2</sup>. Not surprisingly, the vast majority of these workers are employed by the Leisure and Hospitality Sector, which includes hotels and theme parks. This super sector employs a little more than 61,000 people<sup>2</sup>. The second largest employer is the TTU super sector, which employs close to 8,500 people<sup>2</sup>.

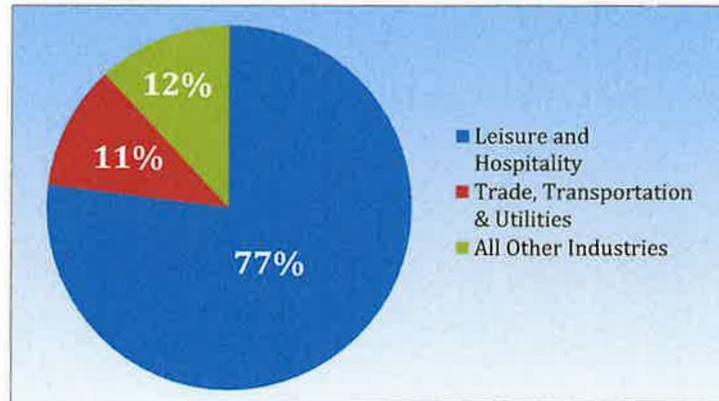
The table lists the 10 largest employers in the International Drive area. The largest employer in the I-Drive Resort area is Universal Studios, which is comprised of two theme parks that employ about 26,000 people<sup>2</sup>. SeaWorld Orlando has three parks in the southern part of the resort area that employs approximately 6,032 people<sup>6</sup>.

Remaining firms are hotels located across the resort area. Westgate Resorts and Rosen Hotels and Resorts have numerous properties across Orlando. Wyndham Vacation Ownership's headquarters employ 3,600 people<sup>6</sup>. Finally, the OCCC rounds the top ten largest employers with almost 1,000 employees<sup>6</sup>.

Similar to what it did with businesses, the ECFRPC also used a geographic approach to analyze employment concentrations within the I-Drive Resort area. Based on GIS analysis, more than half of all I-Drive employment is concentrated north of Sand Lake Road. This portion of the I-Drive includes the Universal Resorts tourist area. It is also home to most of the establishments.

The next largest concentration of employment is south of the S.R 528. This area has five locations with 1,000 employees or more<sup>2</sup>. Finally, the area between Sand Lake Road and the S.R 528 is home to more than 60,000 employees<sup>2</sup>.

## Percentage of Employees by Industry Super Sector



## Ten Largest Employers within the Study Area (Estimates)

Company as of 2019	Estimated Number of Employees
Universal Orlando Resort	26,000
SeaWorld/Aquatica/Discovery Cove	6,032
Westgate Resorts*	5,151
Rosen Hotel & Resorts*	4,534
Loews Hotels*	2,756
Wyndham Vacation Ownership	3,600
Marriott Vacations	5,350
Hyatt Regency Orlando	1,300
Orange County Convention Center	900

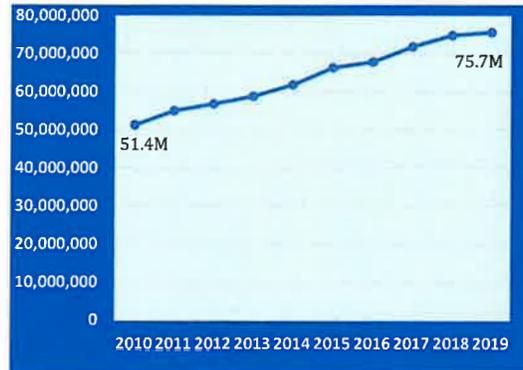
\*All Properties in Hotel Group

Sources: Direct Company Contact, Orlando Sentinel, Orlando Business Journal

# TOURISM ACTIVITY AND FISCAL IMPACTS

The Tourism Activity and Fiscal Impact section of the report provides estimates of the number and type of visitors coming to the I-Drive Resort Area, the amount that they spend in our region, and how much revenue this spending generates for Orange County. To complete this analysis, the ECFRPC used information from D.K Shifflet & Associates provided through the International Drive Improvement District Office. All visitation estimates are based on figures from 2019, which were the most readily available at the inception of this project.

**Travel to Orlando 2010-2019**



The Tourism activity report provides a general profile of I-Drive visitors. It also discusses visitor numbers according to their length of stay, purpose of the trip and origin market. These visitor characteristics are very important as they help to calculate the amount of money spent by these visitors. The ECFRPC used this information to develop different spending profiles for each of these visitor subgroups.

Finally, the report discusses the fiscal impact that I-Drive visitors have in Orange County. Visitors generate a large amount of tax revenues for local governments without consuming many services. These include estimates of the amount of TDT and sales taxes paid by these visitors. Moreover, the area's high number of visitors also has an indirect impact on the amount of fees collected by local governments such as building permits.

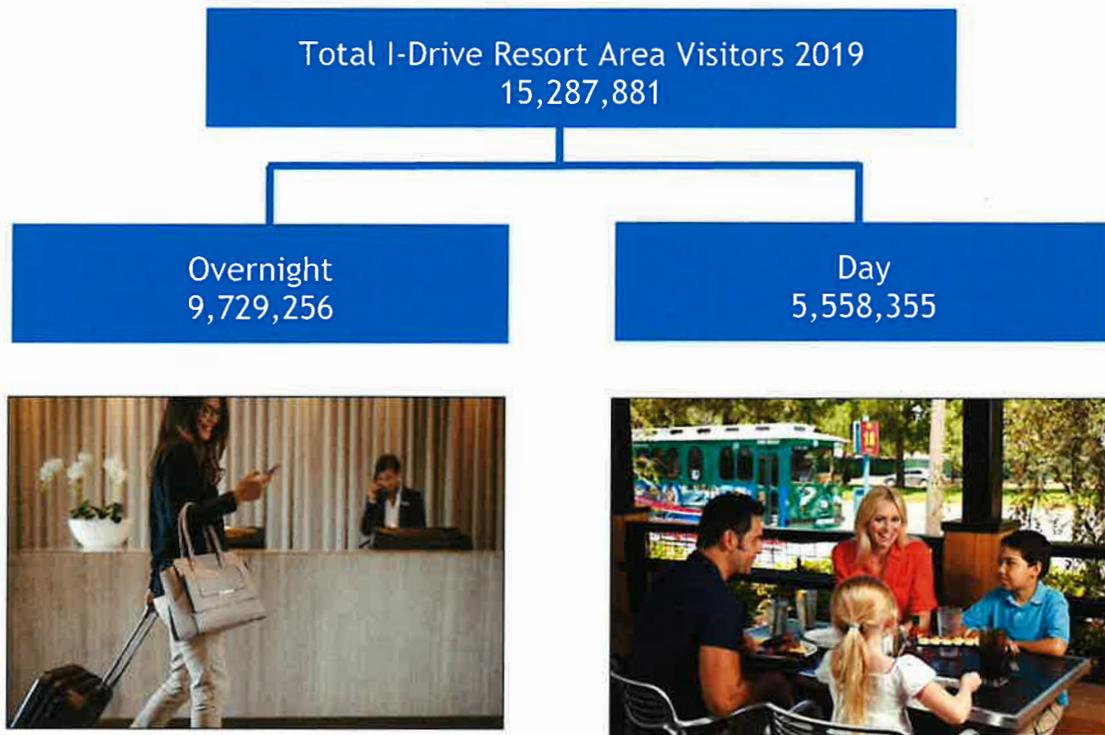
More detailed information about the assumptions and formulas used by the ECFRPC to calculate all these numbers is provided on the Technical Appendix at the end of this report.



# I-DRIVE VISITOR PROFILE 2019

According to ECFRPC calculations, the I-Drive Resort Area received almost 15.3 million visitors in 2019.

More details about the characteristics of these visitors are provided in the next pages.

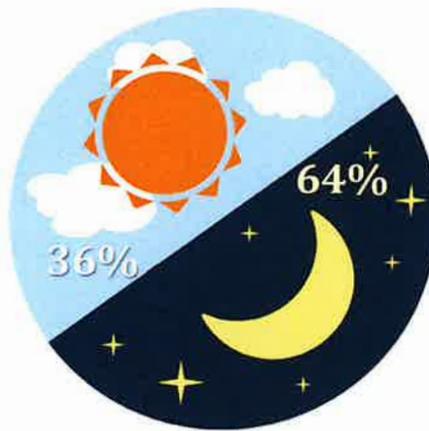


# VISITATION

According to ECFRPC calculations, the I-Drive Resort area received more than 9.7 million overnight visitors in 2019. Most of these people come from outside the state of Florida and international destinations. This number includes visitors coming to I-Drive for vacation and business purposes. Overnight visitors represented 64% of all visitors coming to the I-Drive Resort Area. Overnight visitors, which include all people that stayed at least one night, tend to spend more money than Day Visitors. Therefore, they have a higher economic impact. Most visitors arrive by plane or automobile.

The average daily rate for I-Drive Resort accommodations in 2019 was \$138.29. The average occupancy for I-Drive Resort accommodations in 2019 was 78%.

## Percentage of Visitors by Length of Stay



Total Number of I-Drive Resort Area Visitors by Length of Stay		
Visitor Type	Number of Visitors	Percent Total
Overnight	9,729,526	64
Day	5,558,355	36
Total	15,287,881	100

Source: ECFRPC calculations based on numbers provided by the International Drive Improvement District

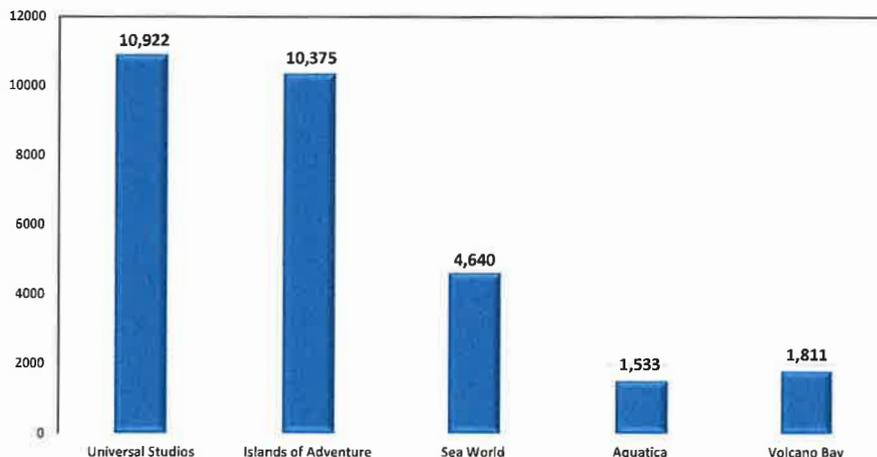
# THEME PARK ATTENDANCE 2019

There are six large theme parks located within the I-Drive Resort area: Universal Orlando, Islands of Adventure, Volcano Bay, Sea World, Aquatica and Discovery Cove. While the theme park companies do not release their attendance numbers to the public, there are several businesses that estimate the total number of visitors for the largest parks. According to these reports, the Orlando area theme parks received almost 92 million visits in 2019. Based on these numbers, the I-Drive Resort area theme parks represented about 31.7% of all the theme park visits in the Metro Orlando area.

These theme park attendance figures are 18% higher than the total visitor numbers (75 million). There could be multiple explanations for this discrepancy. While one may not be familiar with the methodology used to calculate these attraction numbers, it can be assumed that they could reflect multiple visits to the theme parks by the same person. Most families that travel to Orlando try to visit as many parks as possible during their stay. The large parks are also selling multi-day passes, which allow visitors to experience several theme parks during their stay. Finally, local visitors (those that live in Orange, Lake, and Seminole counties) could account for a large number of these visits. Florida residents can buy annual passes to the largest theme parks that allow them to visit them multiple times in the year and can get discounts for seasonal events. Local organizations like churches and schools also like to take advantage of our proximity to the theme parks.



I-Drive Resort Area Theme Park Attendance 2019 (in thousands)



Source: Amusement from TEA/AECOM Annual Theme Index, all numbers are for calendar year  
There is no attendance number available for Discovery Cove

# GROUP MEETINGS 2019

The OCCC is the epicenter of the Orlando's convention/group meeting market, with over 2 million square feet of meeting space. Each year the convention center hosts some of the largest conventions and trade shows in the group meeting industry. In the 2018-2019 fiscal year, these events were AAU National Volleyball Nationals, Premiere Orlando 2019, HIMSS, PGA Merchandise Show 2019, and MegaCon Orlando. The 170 events hosted at the OCCC were attended by more than 1.4 million people. These included 119 private convention/tradeshows, 29 meetings and banquets, and 22 consumer and public ticketed events.

Besides the OCCC, there are numerous hotels within the I-Drive Resort area that also cater to the group meeting market. These properties provide the resort area with another 2.5 million square feet of meeting space. Therefore, there is more than 4.5 million square feet of meeting space within the I-Drive Resort Area.

OCCC Top Conventions and Trade Shows FY 2019	
Event	Attendance
AAU National Volleyball Nationals	110,000
Premiere Orlando 2019	57,000
HIMSS	46,480
PGA Merchandise Show 2019	43,000
MegaCon Orlando	68,000

Source: OCCC Annual Report 2018-2019

I-Drive Resort Hotels with Largest Meeting Space as of 2019	
Hotel	Meeting Space (sq ft)
Rosen Shingle Creek	524,000
Orlando World Center Marriott	338,306
Hyatt Regency Orlando	315,000
Hilton Orlando	236,000
Renaissance at SeaWorld	185,000
Caribe Royale Orlando	150,000
Rosen Centre Hotel	150,000
Loews Royal Pacific Resort	132,000
Double Tree by Hilton Orlando at SeaWorld	100,000
Double Tree by Hilton at the Entrance to Universal Orlando	63,000
Rosen Plaza Hotel	60,000
Wyndham Orlando Resort I-Drive	60,000
Loews Portofino Bay Hotel at Universal	57,040
Avanti Palms Resort & Conference Center	20,200
Westgate Lakes Resort & Spa	18,000
Holiday Inn & Suites at Universal	13,000

Source: International Drive Improvement District

# PROPERTY TAX REVENUE

The I-Drive Resort area had a total assessed value of nearly \$14.7 billion in 2019. When acreage is taken into account, the parcels with the highest assessed value are located north of S.R. 528. I-Drive property owners paid more than \$228 million in property taxes in 2019. Commercial properties pay more than 86% all the taxes collected within the I-Drive Resort Area with the accommodation and amusement sectors accounting for most of this money.



International Drive

**Total Assessed Value**  
**\$14.7 Billion**

**Total Property Taxes**  
**\$228 Million**

# OTHER REVENUES 2019

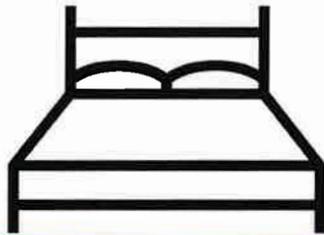
Visitor purchases also have a positive impact on Orange County's coffers. The most evident is the amount of money that these visitors pay for all items they purchase during their visit. The current sales tax rate for Orange County is 6.5%. Based on visitor expenditures of \$8.2 billion in 2019, I-Drive visitors paid approximately \$530.1 million in sales taxes that year.

Visitors staying within the resort area's accommodations also pay another 6% room charge per night, which is known as the Tourism Development Tax (TDT). Based on the total occupied hotel nights (15.2 million) and the average daily rate (\$138.29), the I-Drive Resort area was responsible for a total \$126.4 million in hotel tax collections. In 2019, this represents 44% of all TDT collections.

## Tax Revenues Paid by I-Drive Visitors



**\$530.1 million  
Sales Tax Collections**



**\$126.4 million  
TDT Collections**



Rosen Shingle Creek

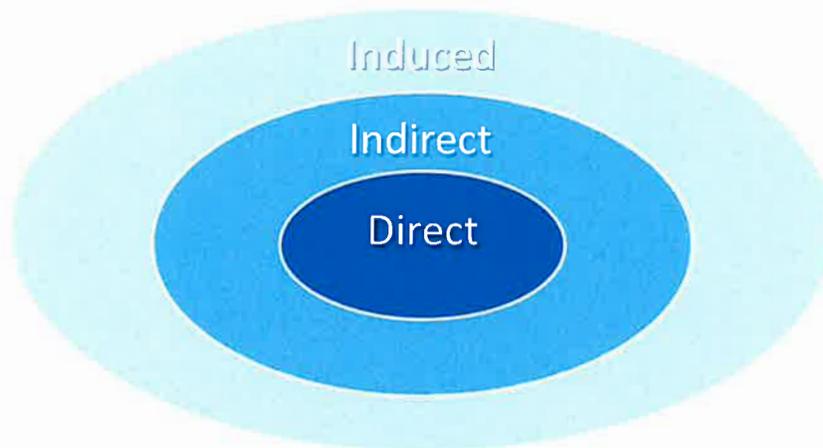
# ECONOMIC IMPACT ANALYSIS 2019

One of the most important goals of this project is to calculate the total economic impact of the I-Drive Resort area to Orange County and the Orlando Metropolitan Statistical Area (Metro Orlando), which also includes Lake, Osceola, and Seminole counties. This total economic impact includes the economic benefits created by I-Drive businesses, their suppliers and employees. For example, a new business opening in I-Drive has a direct impact on the economy when it hires new employees or invests in the building where they are located. This business will also generate an additional demand for goods and services that are usually met by local suppliers. This is considered an indirect economic impact. Finally, the new employees will spend their salary in household needs such as rent, food, and entertainment among others. This is considered the local consumption or induced economic effect. These indirect and induced impacts are often referred to as the economic ripple effect.

For this part of the project, the ECFRPC prepared two different economic impact simulations for the I-Drive Resort area. The first analysis estimates the value that the I-Drive Resort area has for Orange County and the Metro Orlando region based on visitor expenditures. The second simulation estimates the economic impact of 24 new construction projects scheduled to be built between 2019 and 2024. The next pages discuss the data methodology, inputs and assumptions used to develop these simulations and their results.

To complete these analyses the ECFRPC used the PI+ model developed by Regional Economic Models, Inc. (REMI). Since 1980, the REMI model has been successfully used by decision makers across the nation to calculate the economic effects of policies and investments. The REMI model builds on the strengths of four major modeling approaches: Input-Output, General Equilibrium, Econometric, and Economic Geography. The ECFRPC has been using the REMI model since 2003. More detailed information about the model can be found at [www.remi.com](http://www.remi.com).

## The Economic Ripple Effect



**Direct Effect:** Expenditures made by an organization on labor and products

**Indirect Effect:** Purchase of good and services from suppliers

**Induced Effect:** Employee expenditures from wages paid by suppliers

# ECONOMIC IMPACT OF FUTURE I-DRIVE PROJECTS

## Methodology, Inputs, and Assumptions

There are currently 53 I-Drive construction projects being tracked from 2019 over the next five years. For this simulation, the ECFRPC calculated the economic impact that 24 of these construction projects would have on Orange County and Metro Orlando's economies. The resort area has seen a lot of construction during the past couple of years. This momentum is expected to continue in the near future with the opening of new hotels and attractions. According to Construction Journal.com and other sources, these projects represent over \$1.9 billion in new construction investment for the I-Drive Resort area.

For this model, the ECFRPC used the REMI PI+ model's Business Development Scenario, which includes all the variables needed to calculate the economic impact of construction projects. The investment money was entered into the model according to the year the project was completed or is expected to be built. However, the ECFRPC aggregated the results for the five-year period to show the total economic impact of these projects.

## Summary of Economic Simulation Results

The ECFRPC found that these 24 projects will have a positive impact on the region's economy. They will create more than 5,500 new jobs, close to \$604.2 million in sales, and bring almost \$283.2 million in personal income to the region's residents. Most of the benefit will be felt by Orange County residents. The County will add more than 3,800 new jobs, more than \$525 million in sales, and bring more than \$187 million in personal income to residents. Moreover, these projects will add close to \$308.1 million to the County's Gross Regional Product and Metro Orlando's GRP.

The next section of the report discusses these economic indicators in more detail.

I-Drive Projects Construction Investments per Year		
Year	Total Projects	Estimated Investments
2019	5	\$98,545,595
2020	8	\$276,000,000
2021	3	374,200,000
2022	4	49,635,000
2023	1	\$605,000,000
2024	3	564,560,000
<b>Total 6-Year Period</b>	<b>24</b>	<b>\$1,967,940,595</b>

I-Drive Projects Construction Investments per Year		
Economic Indicator	Orange County	Metro Orlando
Total Employment	3,854	4,482
Output	\$525,166,667	\$604,166,667
Personal Income	\$187,000,000	\$283,166,667
Gross Regional Product	\$308,166,667	\$354,666,667

Source: REMI PI+ East Central Florida Region v 1.7

Sources: International Drive Improvement District Office estimates based on information from Construction Journal and the Orlando Business Journal

# ECONOMIC IMPACT OF FUTURE I-DRIVE PROJECTS

**Employment**

Overall, these construction projects would result in the creation of more than 4,500 jobs within Metro Orlando. This number includes 2,583 direct jobs, 1,962 indirect jobs, and induced jobs. All the direct jobs are located in Orange County. The County would also benefit from 85% of the indirect and induced jobs.

Almost 60% of the jobs created will be in the construction sector. However, the construction of these projects will translate into additional jobs in a variety of industries.

**Output**

According to REMI, the investment made for these projects would generate about \$604.2 million in sales in Metro Orlando and \$525.5 million in Orange County. 56% of the output gains spurred by these projects will benefit the Construction sector. Other industry sectors that will also see increases in sales include Real Estate, Retail Trade, and Professional, Scientific and Technical Services.

**Personal Income**

These I-Drive Projects will generate \$283.2 million of personal income to Metro Orlando residents, most of which will stay in Orange County (66%). Most of this income will be the result of wages and salaries paid to employees for a variety of industries. The most benefited industries will be Professional, Scientific, and Technical Services, Retail Trade, and Construction.

**Gross Regional Product**

These I-Drive projects would add \$354.7 million and about \$308.2 million to Metro Orlando and Orange County's Gross Regional Products respectively.

Average Annual Employment by Industry Sector		
Industry Category	Orange County	Metro Orlando
Construction	2,249	2,538
Retail Trade	214	289
State and Local Government	144	168
Professional, Scientific and Technical Services	150	181
Other Industries	1,097	1,306

This Economic Impact Analysis Report has confirmed that the I-Drive Resort area is an important economic activity center for Orange County, the City of Orlando, and the Metro Orlando area. The resort area is home to more than 1,800 businesses including six of the world's most visited theme parks and three national/international company headquarters. In 2019, the study area had a total assessed value of more than **\$14.7 billion** and generated more than **\$228 million** in property taxes. This economic activity is the result of the **15.3 million** visitors that came to I-Drive to visit one of its many attractions or attend a business convention. These visitors are also responsible for generating approximately **\$530.1 million** in sales tax and **\$126.4 million** in TDT collections.

The economic impact of the resort area extends beyond its boundaries. This positive economic impact will continue through the next six years. Private companies are expected to invest about \$1.97 billion to build new hotels, apartment complexes, retail projects and new attractions. The economic impact of these projects will reverberate across Orange County and the Metro Orlando region. These projects are estimated to generate more than 4,400 additional jobs, \$604.2 million in sales, \$283.2 million in personal income, and add close to \$354.7 million to Metro Orlando's gross regional product.

Based on this analysis results, the I-Drive Resort area is an important contributor to the success of the Metro Orlando region. Careful planning and investment will keep the area as one of the nation's most competitive tourism activity centers and help it continue to be an important source of jobs and tax revenue for Orange County and the region, for years to come.

## Upcoming I-Drive Resort Area Development



## ABOUT THE EAST CENTRAL FLORIDA REGIONAL PLANNING COUNCIL (ECFRPC)

The ECFRPC was established in 1962 as an area-wide association of local governments. It is one of Florida's ten regional planning councils and serves governments and organizations located within Brevard, Lake, Orange, Osceola, Seminole, Sumter and Volusia counties. Council staff provides technical assistance in the areas of land use and environmental planning, emergency preparedness, geographic information systems (GIS), health, housing, urban design, transportation and economic and fiscal analysis among others. Because of the ECFRPC, member governments have received more than \$10.6 million in federal grants since 2011. This represents a return on investment of \$2.53 for every dollar paid in assessments.

The ECFRPC is currently designated by the U.S Economic Development Administration as the region's Economic Development District (EDD). The EDD program provides economic technical assistance to public and private organizations within the seven-county region. This includes performing economic impact analyses using the REMI model, developing economic strategic plans, and assisting with grant applications.

For more information about ECFRPC programs, visit the organization's website at [www.ecfrpc.org](http://www.ecfrpc.org).



East Central Florida Regional Planning Council

455 North Garland Avenue, Suite 414

Orlando, FL 32801

Phone: 407-245-0300

This technical appendix provides the formulas and assumptions used to develop the visitation numbers for the I-Drive Resort Area and the spending profiles.

## **Overnight Visitors**

The number of overnight visitors was calculated using the following formula: Total number of occupied hotel/time share nights x annual room occupancy x average party size / length of stay.

Overnight visitors were distributed among five different subcategories (Leisure Florida, Leisure Non-Florida, Business Florida, Business Non-Florida and International) to account for different spending patterns. For the purpose of this analysis, all International travelers were considered overnight visitors. The business visitation numbers were adjusted based on the number of convention delegates that visited the Orange County Convention Center in 2019.

## **Occupied Hotel/Time Share Nights**

According to the I-Drive Improvement District, there are 48,223 hotel rooms located within resort area's boundaries. The ECFRPC multiplied this number by 365 to get the total number of occupied room nights.

## **I-Drive Average Party Size**

The ECFRPC used a weighted average rather than a regular average to calculate the average party size of I-Drive visitors. In 2019, the average party size of Orange County visitors ranged from 1.3 people for Business Travelers to 2.4 people for Domestic Leisure Travelers. The influence of each visitor category in determining this average is based on the total number of visitors received in 2019.

## **I-Drive Average Length of Stay**

The ECFRPC used a weighted average rather than a regular average to calculate the average length of stay for I-Drive visitors. In 2019, the average length of stay for Orange County visitors ranged from 2.9 nights for Leisure Florida Visitors to 9.1 nights for International Visitors. The influence of each visitor category in determining this average is based on the total number of visitors.

## **Tourist Development Tax Calculations**

It is important to note that the TDT numbers provided by the Orange County Comptroller are based on Orange County's fiscal year (Oct-Sept) while the hotel occupancy numbers reflect calendar year (Jan-Dec). For the percentage calculation, the ECFRPC used the Actual Number figure, which was published in the Annual Revenue Monitoring Report published by OCCC on September 30, 2018.

## **REMI Model (Regional Economic Models, Inc.)**

Visitor spending categories were put into the REMI model as industry sales according to the closest NAICS category. For car transportation, the ECFRPC used the Fuel consumer spending category.

The ECFRPC made small adjustments to the model to prevent over counting. The retail numbers were adjusted down 25% to account for opportunity costs. The ECFRPC also applied a local spending offset for all the spending generated by Florida Visitors. The reasoning behind using this variable is that the money that state residents pay for I-Drive vacations could be used to pay for other recreational expenses at their local communities. For this variable, the ECFRPC used the spreader option in REMI, which distributes the money across the different Florida regions. The ECFRPC decided against making any adjustments to the spreader.

## **Infogroup**

Analytics and marketing services provider that delivers best in class data-driven customer-centric technology solutions. Their data and software-as-a-service (DaaS & SaaS) offerings help clients of all sizes, from small companies to FORTUNE 100™ enterprises, increase their sales and customer loyalty. Infogroup provides both digital and traditional marketing channel expertise that is enhanced by access to our proprietary data on 245MM individuals and 25MM businesses, which is distributed real-time to their clients.

## **SOURCES UTILIZED:**

- I-Drive Business Improvement District
- Visit Florida
- Visit Orlando
- D.K Shifflet & Associates
- The Info Group
- Orange County Property Appraisers Office
- Orange County Tax Collector's Office
- REMI (Regional Economic Models Inc.)

**EXHIBIT 24**

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BOARD OF COUNTY COMMISSIONERS MEETINGS  
BRIGHTLINE  
WORK SESSION AGENDA  
A PLANNING, ENVIRONMENTAL AND DEVELOPMENT  
SERVICES DEPARTMENT

DATE: June 22, 2021

TRANSCRIBED BY: Denise Smith Byer, RPR, FPR  
Notary Public, State of  
Florida

Pages 1 - 85

1 MR. CEGELIS: Correct. More than the  
2 estimate that we had made for the 417  
3 alignment. Our own estimate is a billion.

4 MAYOR DEMINGS: Right.

5 MR. CEGELIS: The VHB estimate was  
6 between 28 and 250.

7 MAYOR DEMINGS: However, at the  
8 Expressway Authority board meeting, there  
9 were professional engineers, representatives  
10 of VHB that had a caveat that they put in  
11 there that that was just an estimate, there  
12 was a lot of additional work that needed to  
13 be done to really validate that estimate.  
14 There were certain assumptions that were  
15 made.

16 And so given that, that suggests that the  
17 costs for the alternative route could be  
18 anywhere from 28 million to \$1 billion.  
19 That's a wide disparity in the potential  
20 costs. And we don't know what that is.

21 But today, based on what you just said,  
22 that this project is viable because  
23 Brightline would be making the private  
24 investment or getting investors involved and  
25 it's not contingent upon the receipt of

1 federal dollars or any other public  
2 dollars --

3 MR. CEGELIS: That is correct.

4 MAYOR DEMINGS: -- is that correct?

5 And to my knowledge, in terms of whatever  
6 that -- if it truly is additional dollars, I  
7 have not seen any proposal from other --  
8 others who would pay the delta, the  
9 difference there. Have you?

10 MR. CEGELIS: No. We have not seen.

11 It is important to note that this big  
12 cost variance causes a lot of concern amongst  
13 the community. We understand that. We have  
14 completed 15 percent design, so our own cost  
15 estimate for our preferred alternative is  
16 based on that 15 percent design.

17 And we also -- the way that we made our  
18 comparison is we utilized the Florida high  
19 speed rail design, which was completed to a  
20 level of 30 percent back in 2010. So that is  
21 a studied route where the impacts have been  
22 understood, the utility interfaces, the  
23 roadway interfaces, the grades, the impacts  
24 to local businesses, have all been understood  
25 in that Florida high speed rail alignment.

**EXHIBIT 25**

**Congress of the United States**  
**Washington, DC 20515**

May 6, 2021

The Honorable Peter DeFazio, Chair  
The Honorable Sam Graves, Ranking Member  
Committee on Transportation and Infrastructure  
2165 Rayburn House Office Building  
Washington, D.C. 20515

Dear Chairman DeFazio and Ranking Member Graves,

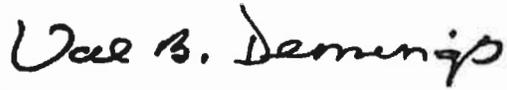
We are writing to express our support for the Passenger Rail Improvement, Modernization, and Expansion (PRIME) grant program that was included in last year's House-passed H.R. 2 Moving Forward Act. As the Committee develops transportation legislation in the coming weeks, we urge you to make privately funded higher-speed intercity passenger rail carriers eligible for PRIME grants if they apply in partnership with one of the other eligible governmental entities and meet the program requirements.

Florida has the first operational higher-speed rail system in the United States. Brightline built the first phase of its rail network between Miami and West Palm Beach. It is now constructing the second phase to Orlando International Airport and is over 50% complete. Brightline is also planning a third extension to Tampa. Not only does high speed rail provide fast, safe, and reliable transportation, but it reduces greenhouse gas emissions by providing a viable alternative to travel by passenger vehicle. We see great benefits from high speed rail enabling tourists to travel from beaches to theme parks and for business travelers to travel around the state by train. Our communities have also benefited from economic development around train stations.

Our country has lagged behind other countries in developing high-speed passenger rail networks. The fact that some passenger rail projects have private investment should not make them any less eligible for PRIME program grants than projects undertaken by government entities. Brightline is collaborating with state and local governments to develop stations and connect directly to commuter rail systems and airports. Section 9102 in the Moving Forward Act specifies documentation applicants must provide and technical and financial requirements they must meet to be eligible for a PRIME grant. It also specifies the types of projects the Secretary of Transportation should prioritize. With these requirements in place, we believe that private applicants in partnership with otherwise eligible public entities should be eligible for PRIME grants.

We appreciate your hard work and look forward to supporting your efforts to advance transformative infrastructure legislation. Thank you for your consideration.

Sincerely,



Val B. Demings  
Member of Congress



Stephanie Murphy  
Member of Congress



Darren Soto  
Member of Congress



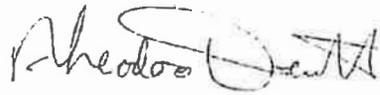
Maria Salazar  
Member of Congress



Carlos Gimenez  
Member of Congress

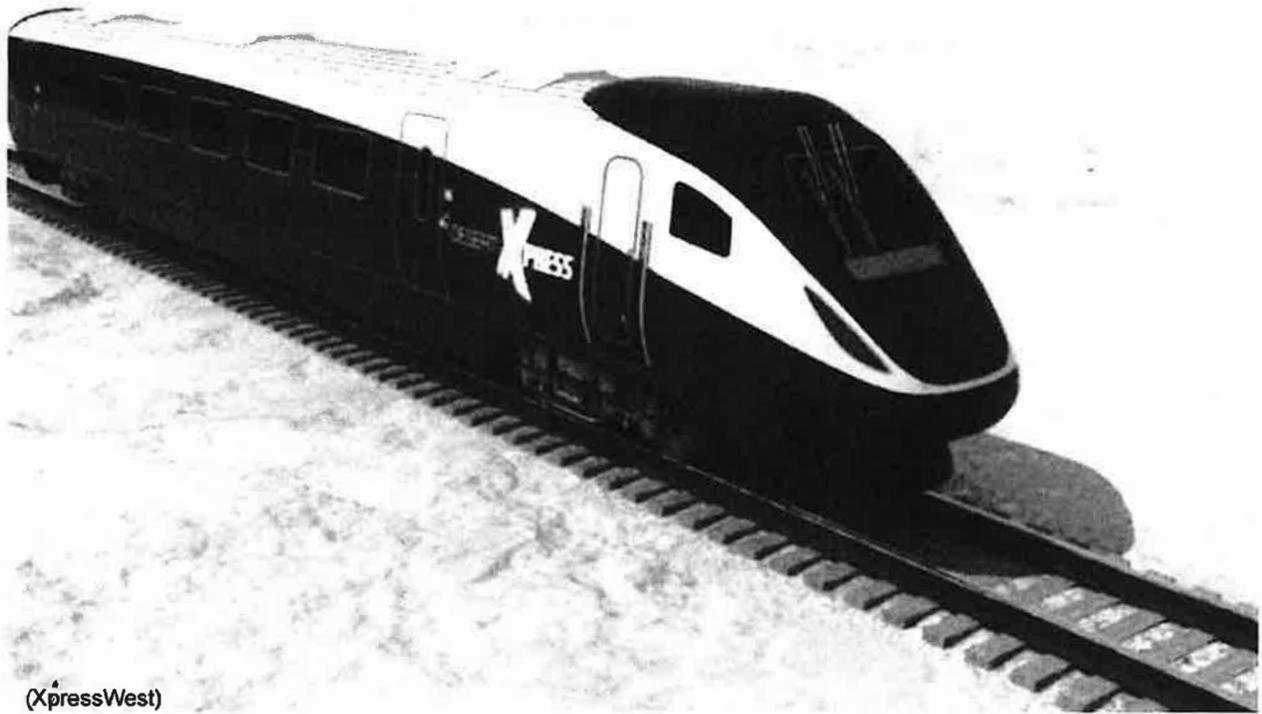


Debbie Wasserman Schultz  
Member of Congress



Ted Deutch  
Member of Congress

## EDITORIAL: Handouts may soon be coming to Vegas-SoCal train



Las Vegas Review-Journal

June 29, 2021 - 9:00 pm

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When Brightline West took over the planned high-speed rail project between Las Vegas and Victorville in 2018, the idea was to use private funds to finally bring the long-envisioned project to fruition. The company made a name for itself by developing the only privately run intercity rail line in the country, in Florida.

Turns out, however, that the taxpayers aren't safe after all. Funny how that works out.

The Review-Journal's Gary Martin reported this week that, thanks to the handiwork of Rep. Dina Titus, Brightline West may soon be eligible to receive federal transportation funds under the \$547 billion Invest in America Act. While the language of the bill has yet to be finalized, Rep. Titus said she has worked closely with Rep. Peter DeFazio, the Oregon Democrat who chairs the House Transportation Committee, to amend the legislation to allow certain "private" rail projects to tap federal cash as long as they partner with a public entity.

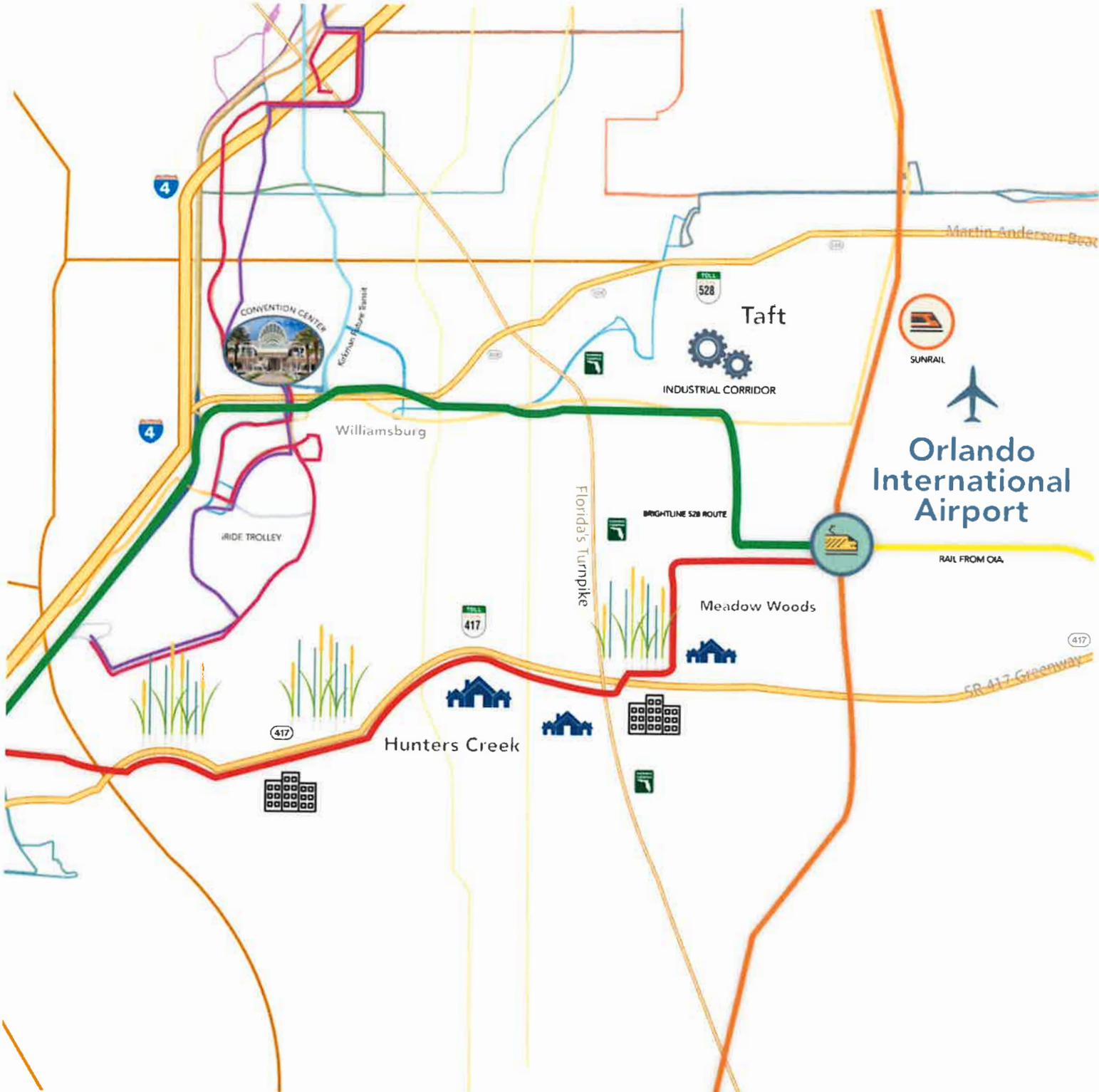
None of this should be surprising. Brightline West officials have repeatedly oversold the project's financial viability and have backed off their previous construction timetable because investors wouldn't bite. Despite receiving \$800 million in private-activity bonds from California and Nevada — which could be leveraged to raise four times that amount — Brightline was forced to pull a planned bond sale last year because of a lack of interest. It will now have to reapply for the bonds and claims to be preparing for a 2022 reboot.

The pandemic didn't help, no doubt. But the fact that some version of this proposal has been floating around for more than 30 years with so little to show for all the promotion and hype indicates that the challenges remain vast and that the project's viability may be more complicated than the optimistic promises suppose.

All that would be irrelevant if Brightline West raised enough private capital in the markets to give it a go and live with the results. But now it appears increasingly likely that the company will sidle up to the federal trough, leaving taxpayers rather than private investors to assume much of the risk. And the risk will not be insignificant. The Victorville-to-Vegas train will cost \$8 billion, but if history is any guide, the final price tag will be much higher. Witness the ongoing fiasco in California involving the L.A. to San Francisco rail line money pit.

Perhaps a train shuttling gamblers from Victorville to the Strip will turn out to be a gold mine for Southern Nevada. Perhaps not, given that even heavily subsidized Amtrak couldn't maintain a similar route and airline travel remains more convenient for many travelers. Either way, the taxpayers may soon be forced to find out.

**EXHIBIT 27**



Kissimmee Value Transit

Taft



INDUSTRIAL CORRIDOR



SUNRAIL



Orlando International Airport

RIDE TROLLEY

Williamsburg

BRIGHTLINE 528 ROUTE

Meadow Woods

RAIL FROM OIA

Florida's Turnpike

Hunters Creek

SR 417 Greenway

4

4

417

417

528

417