

Intermodal Feasibility Study Data

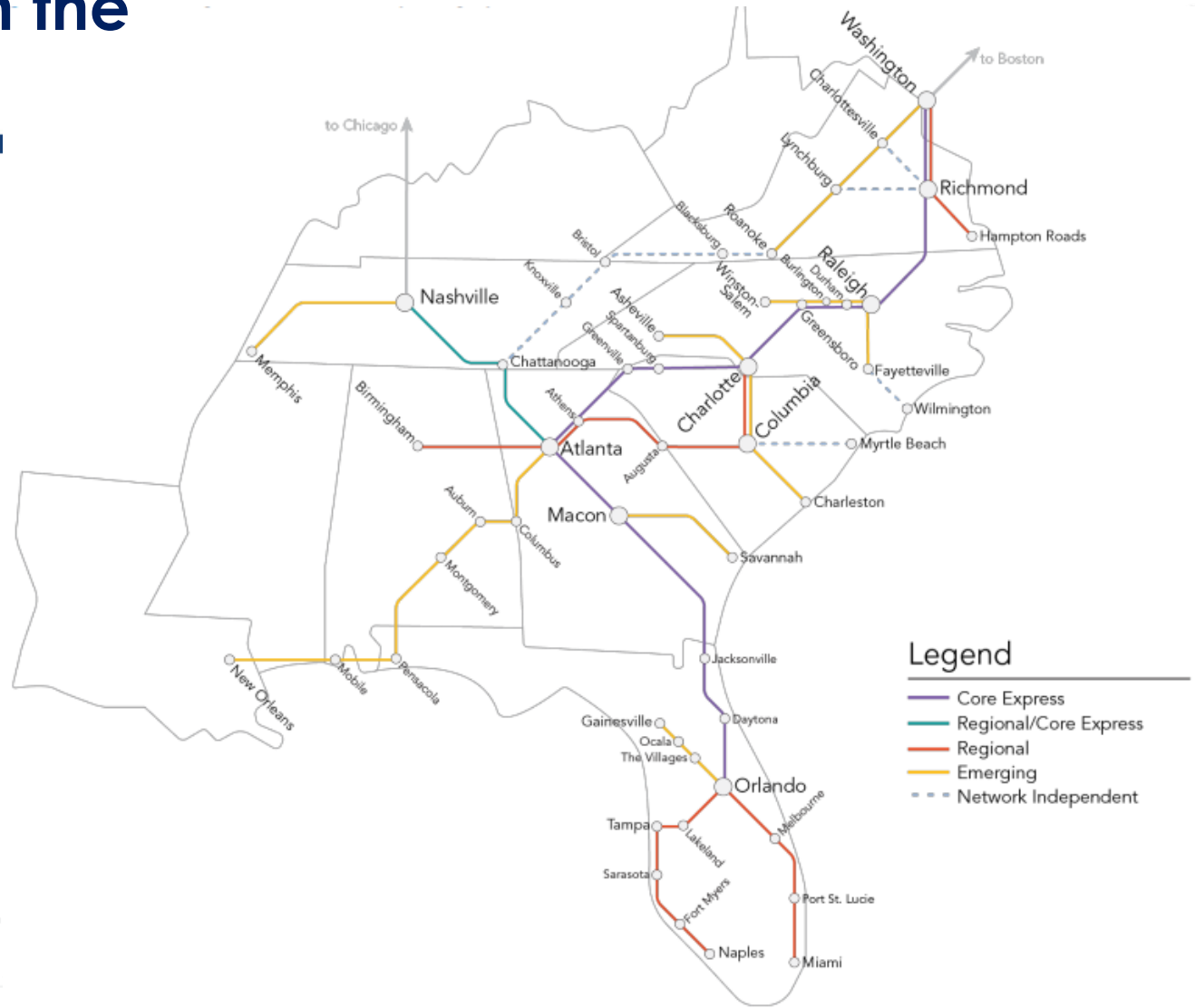
Exploring the Station Market

Prepared for: Tourism Development Committee



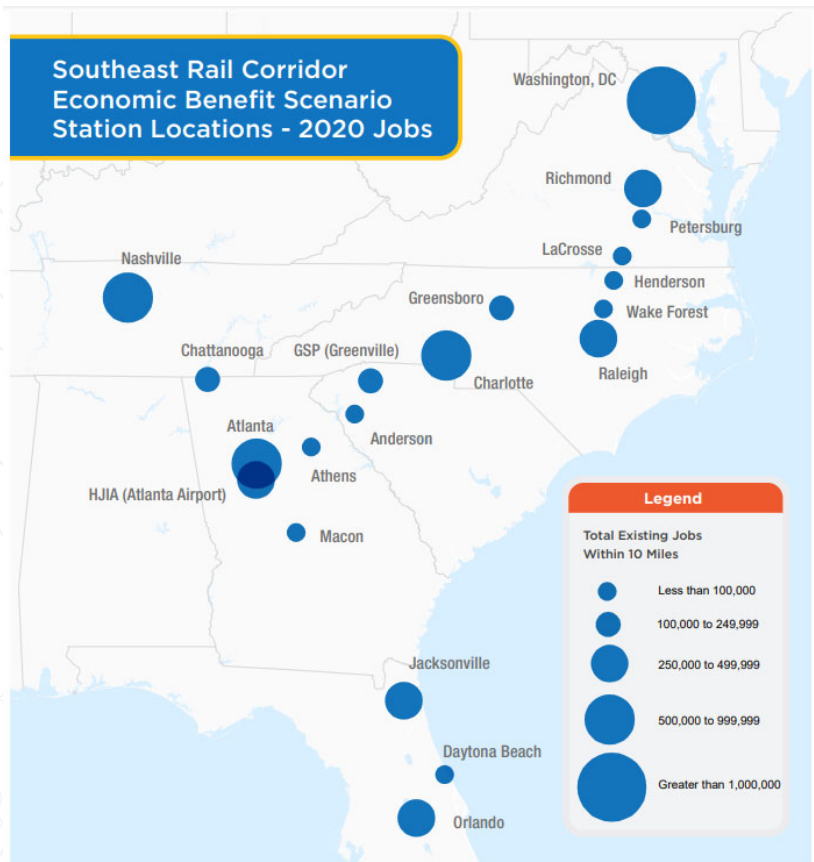
Passenger Rail in the Southeast

- Broader US trend to expand passenger rail
- Long-term vision



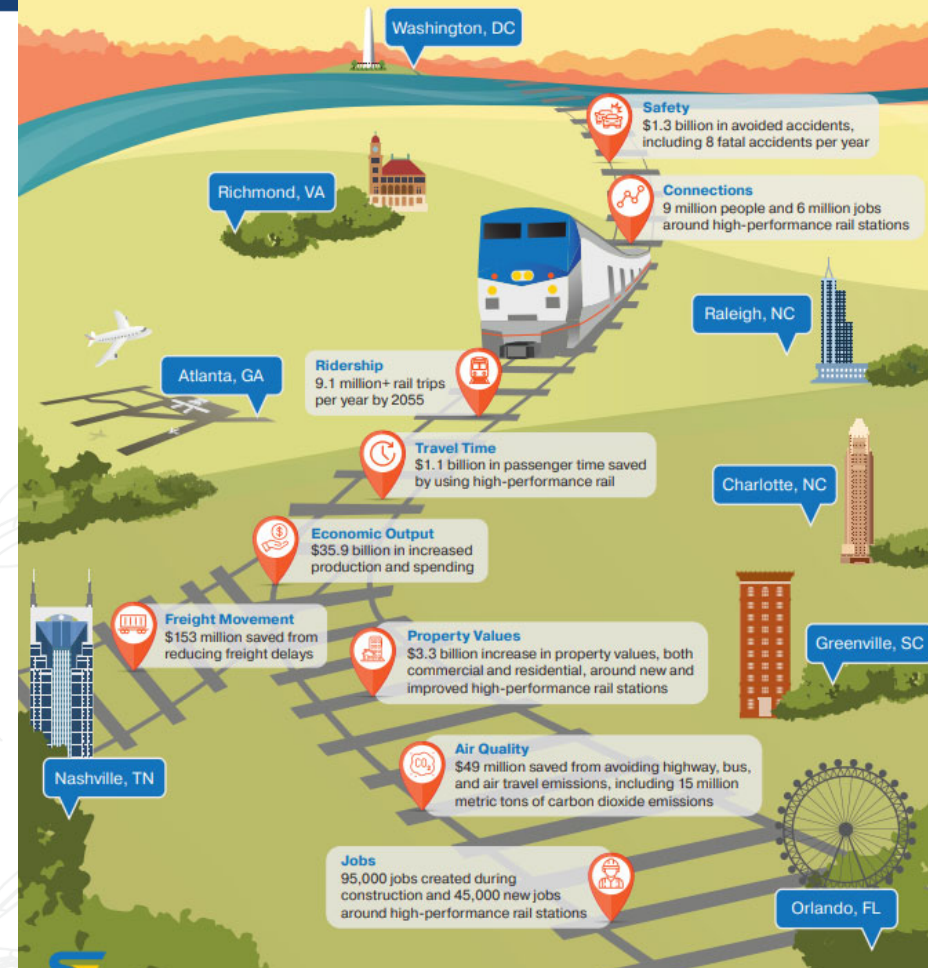
Data Source: Southeast Corridor Commission

Economic Impacts of Rail in the Southeast



Economic Benefits of High-Performance Rail in the Southeast

Over the next 30 years of construction and operations, high-performance rail benefits are **more than double** the investment costs.



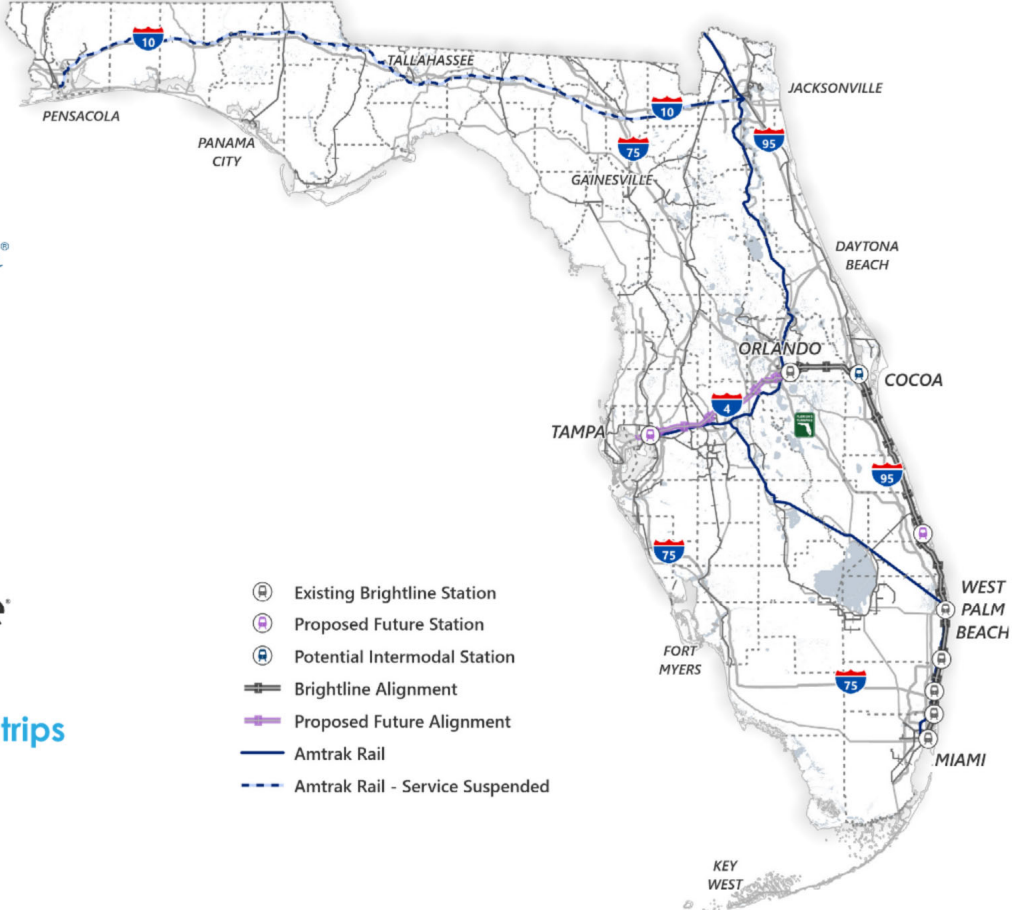
Passenger Rail in Florida



Operates 3 trains a day



Operates 32 weekday roundtrips

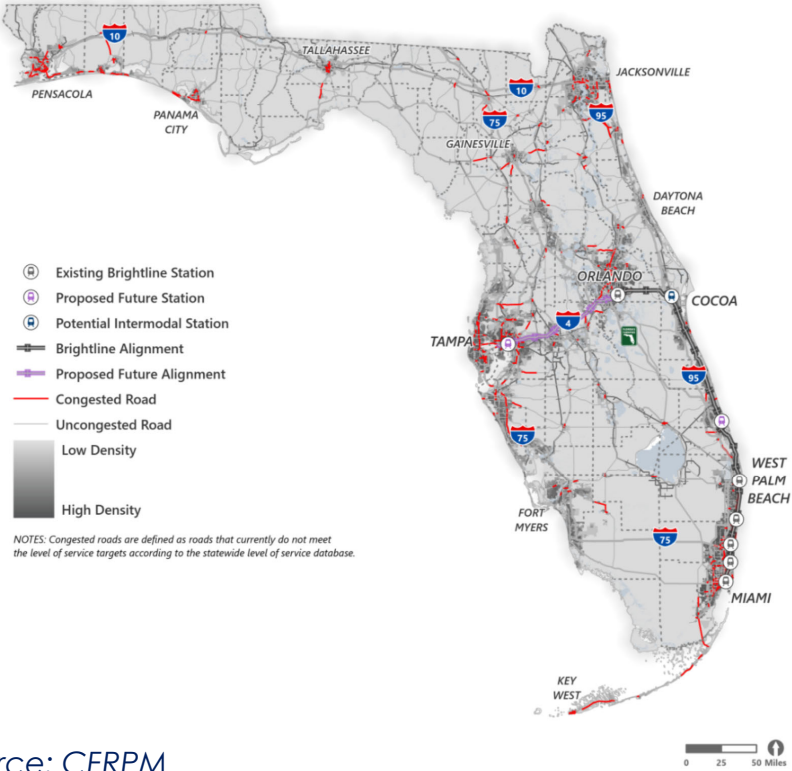


- Existing Brightline Station
- Proposed Future Station
- Potential Intermodal Station
- Brightline Alignment
- Proposed Future Alignment
- Amtrak Rail
- Amtrak Rail - Service Suspended

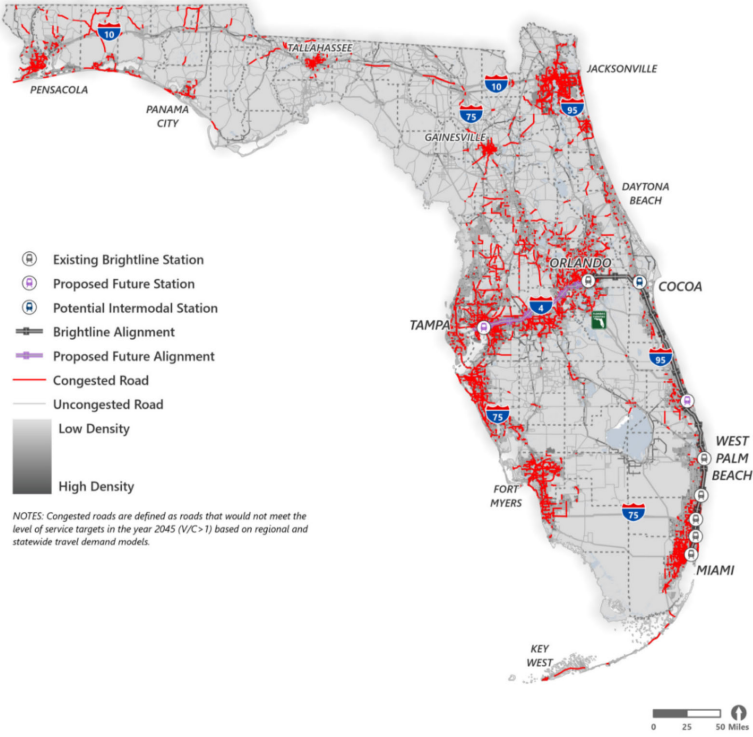
Need for Rail – Road Congestion



Current



Future



Data Source: CFRPM

Economic Impact shown in FDOT Passenger Rail Study

With 16 trains a day....

- Employment impact: **25,520 job-years**
(job years = one year of economic employment)
- Economic impact: **\$2.8 Billion**

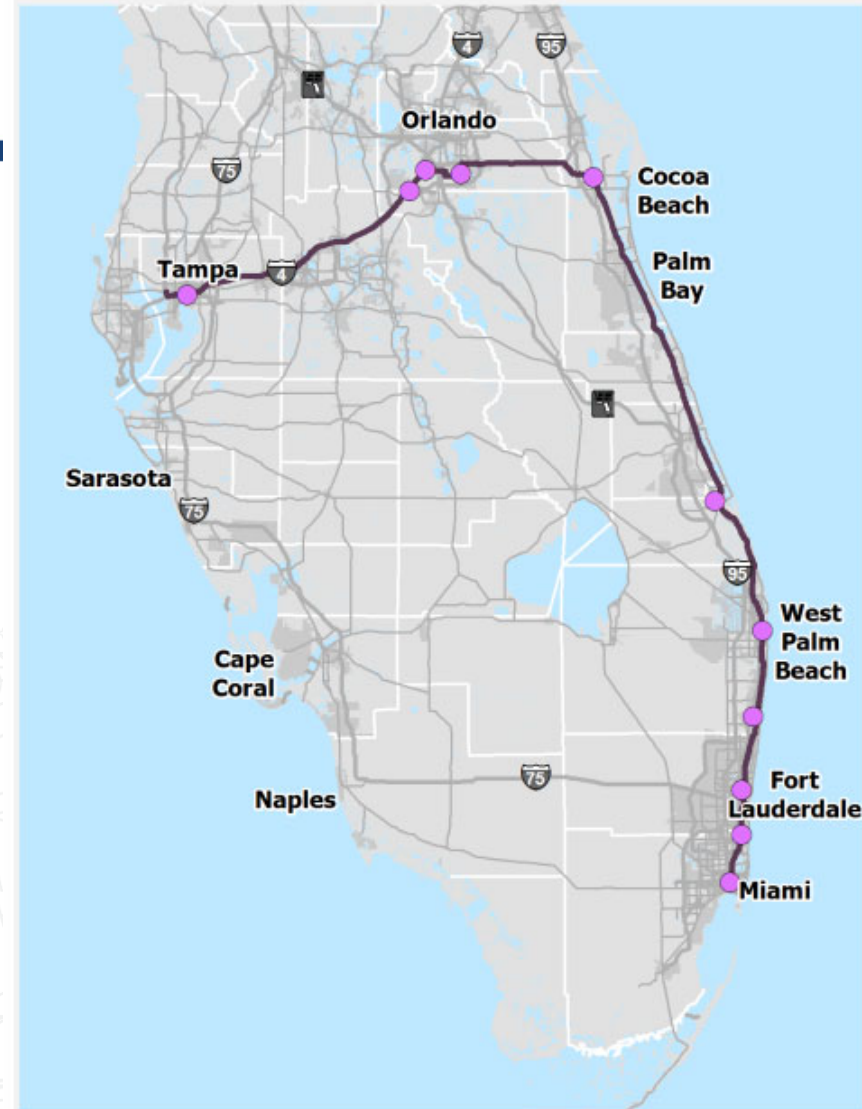
Projected Employment and Economic Impacts ^{7/8}

	2 Daily Trips		8 Daily Trips		16 Daily Trips	
	Direct	Total	Direct	Total	Direct	Total
Employment Impact ¹	2,860	10,830	4,800	18,200	6,730	25,520
Value-Added Impact ²	\$481	\$1,180	\$809	\$1,982	\$1,134	\$2,778

¹ Employment rounded to the nearest 10 job-years

² In millions of 2018 dollars

3A. MIAMI – TAMPA: FEC/BRIGHTLINE



Brightline in Southeast Florida and Brevard County Prime Destinations



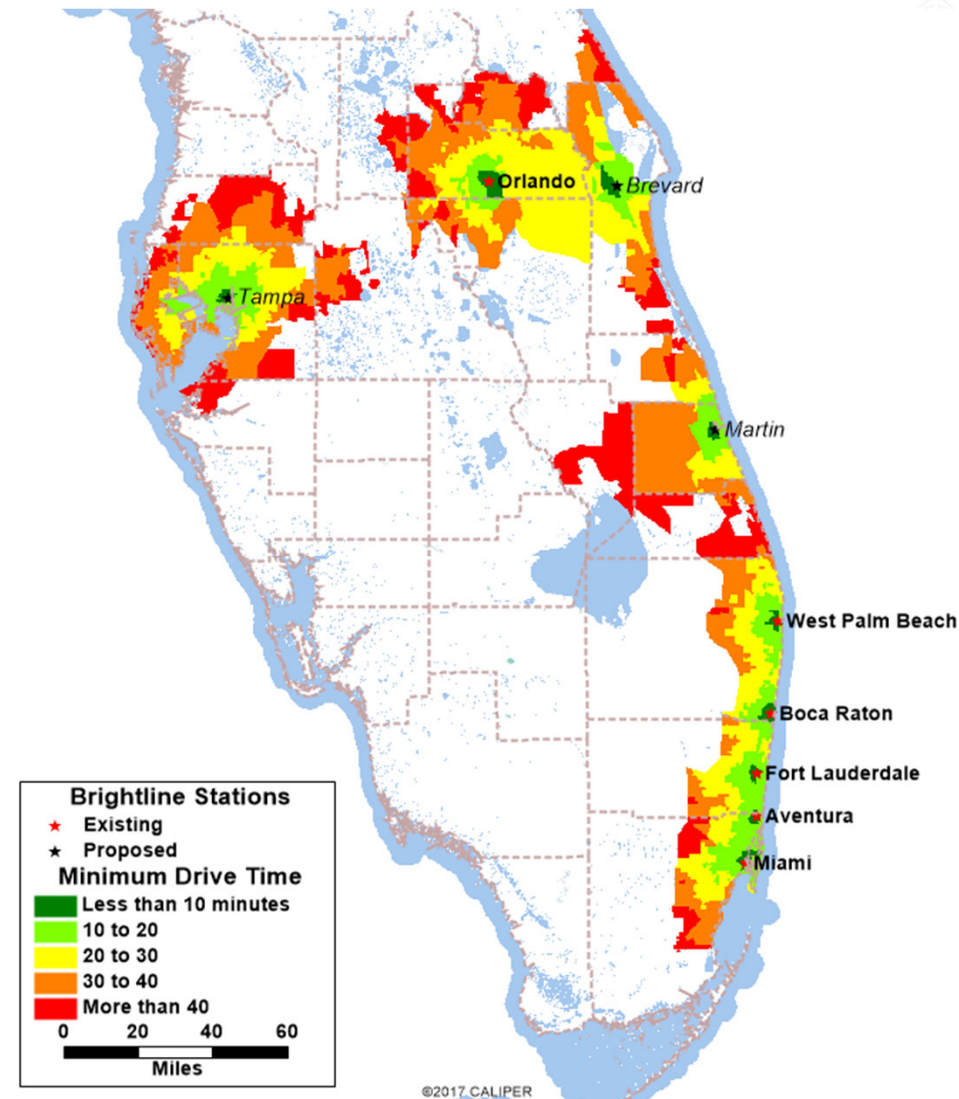
Brevard County Prime Destinations and Potential Rail Connectivity.



Source: HDR

Average Personal Income within Brightline Route

- Along Brightline catchment areas (excluding Tampa)...
- Average per capita income **\$59,577**
- Accounts for **45.1%** of all personal income in the state of Florida



Source: Brightline Ridership and Revenue Study, HDR

Brightline Ridership



Market of **1.6 million riders** that will have the ability to stop in Brevard County

Brightline Data	2022	2023
Number of Riders	1,230,494	1,624,963
Average Fare per Passenger	\$20.03	

Source: Brightline Monthly Reports

Passenger Rail Station in Brevard County



Background and Station Location

- Recommended by Passenger Rail Station Location Study (2016)

THE STATION IS:



15 minutes
from Port Canaveral



25 minutes
from the Kennedy
Space Center



25 minutes
from the Brevard Zoo



40 minutes
from Melbourne-Orlando
International Airport.



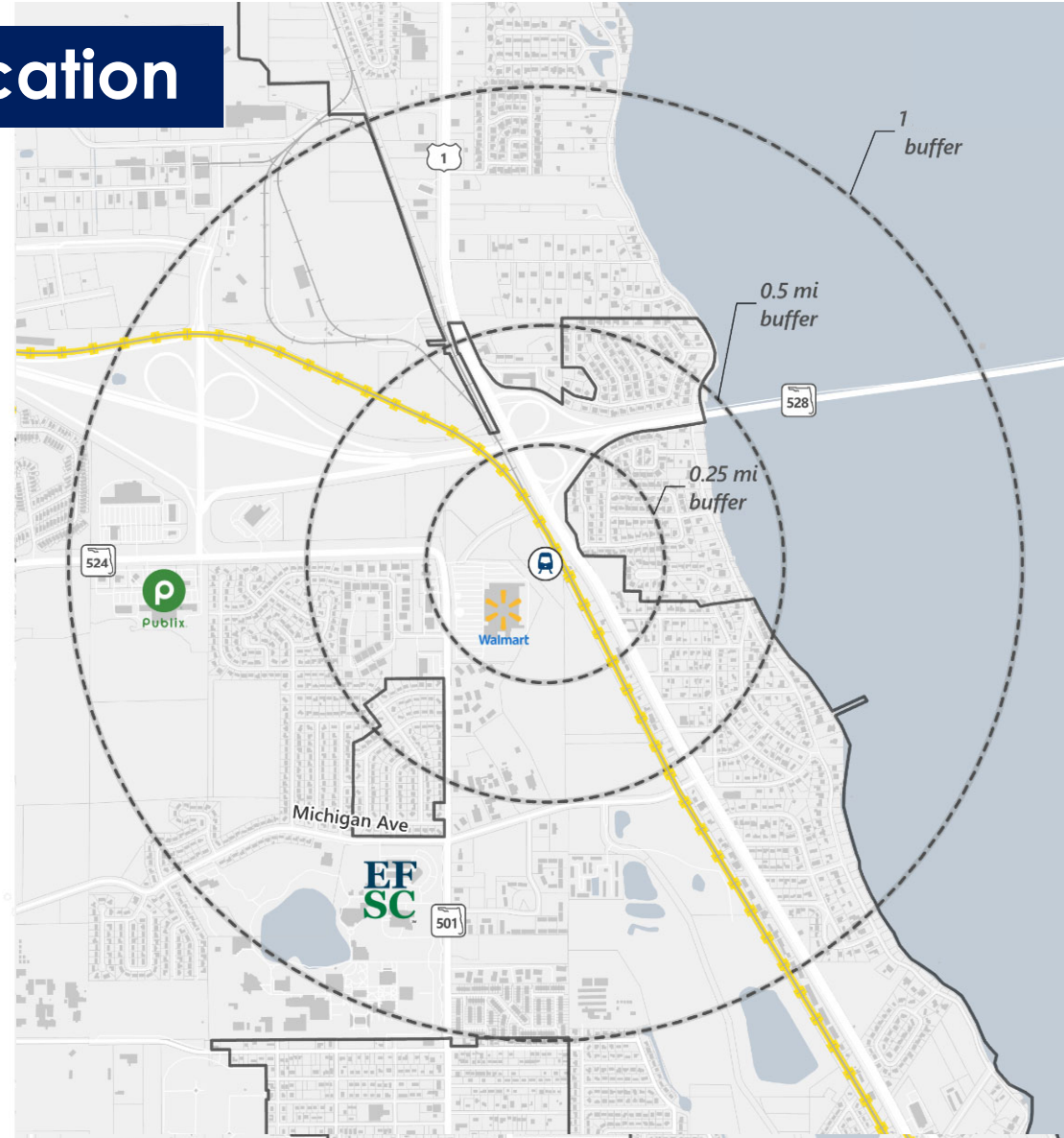
Potential Intermodal
Station



Brightline Alignment



Cocoa City Limits



Tourism Data



- **2 in 3** visitors go to a **beach**
- **2 in 5** visitors are **Florida Residents** (others mostly from neighboring states)
- **1 in 3** visitors will take a **cruise**
- **44%** increase in the last year in multiday cruise passenger embarkments
- **45%** drove to the area, while the rest flew into MCO, MLB or SFB (55%)
- **Top 3** most visited **beaches: Cocoa Beach, Jetty Park Beach** and **Melbourne Beach**
- **2 in 3** visitors will stay **overnight**

Sources:

Tourism Journal Article – Office of Tourism 2023

Port Canaveral Economic Impact Study – Canaveral Port Authority 2023

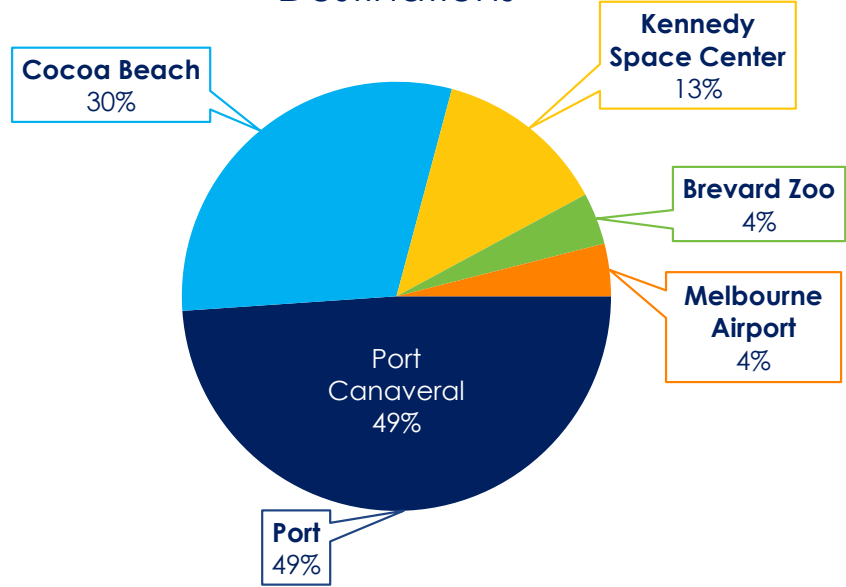
SPACE COAST
OFFICE OF
TOURISM

Weekly Update



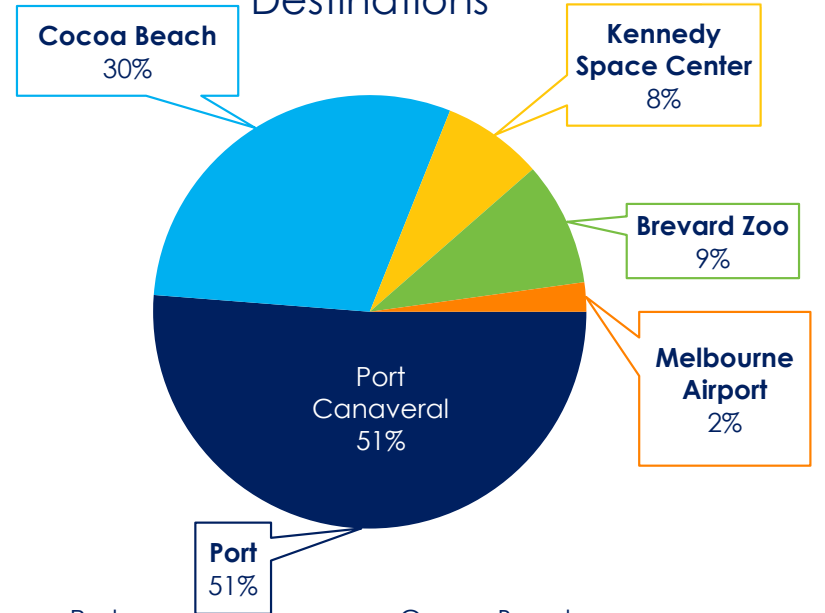
Major Destinations in Brevard County – Travel Split

Weekday Trips to Major Destinations



- Port
- Cocoa Beach
- Kennedy Space Center
- Brevard Zoo
- Melbourne Airport

Weekend Trips to Major Destinations

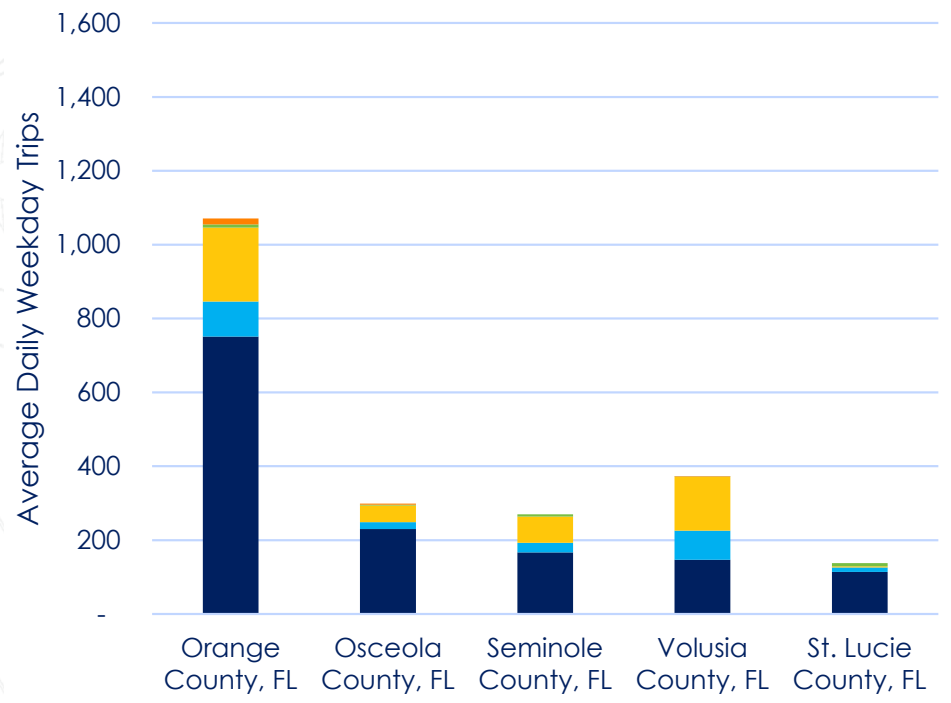


- Port
- Cocoa Beach
- Kennedy Space Center
- Brevard Zoo
- Melbourne Airport

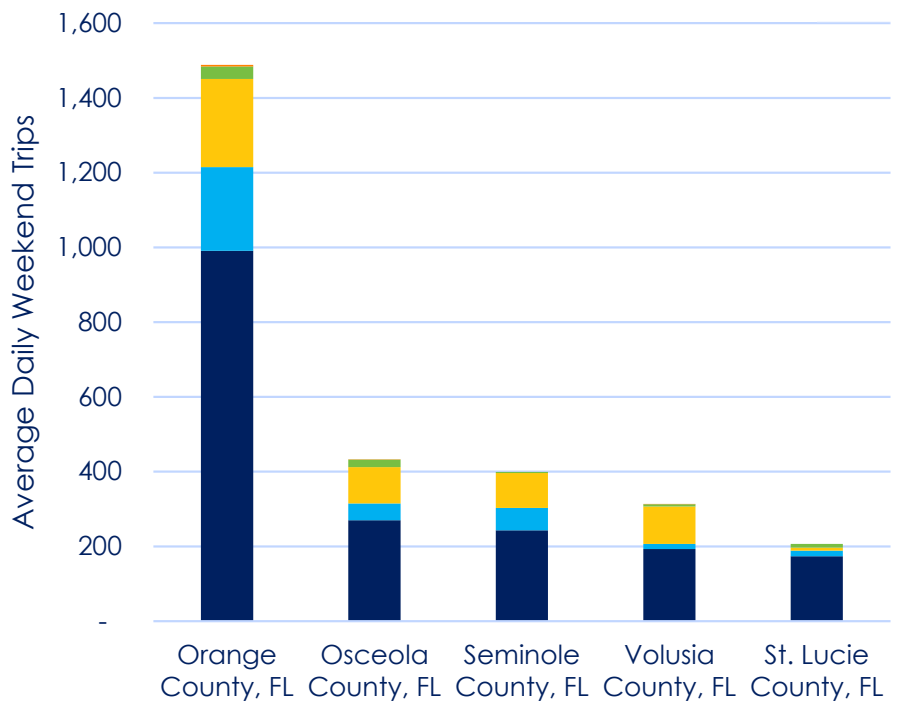
Source: Replica Data, 2022

Where Do Our Visitors Live?

Top 5 Home Locations
(Weekday Destination)



Top 5 Home Locations
(Weekend Tourist Destination)

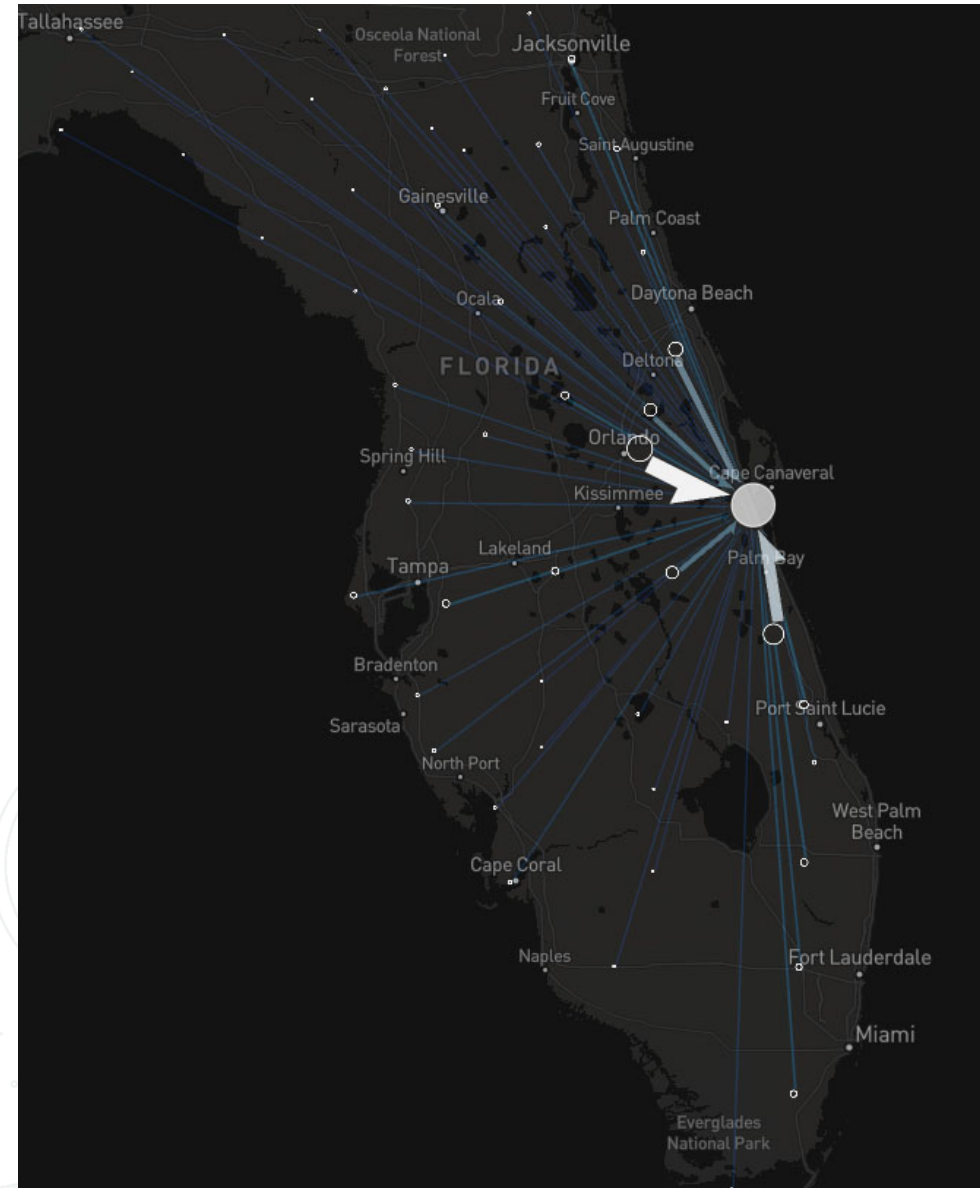


- Port
- Cocoa Beach
- Kennedy Space Center
- Brevard Zoo
- Melbourne Airport

Source: Replica Data, 2022

Largest Markets Traveling to Brevard County

- Orange County
- Indian River County
- Volusia County
- Osceola County
- Seminole County

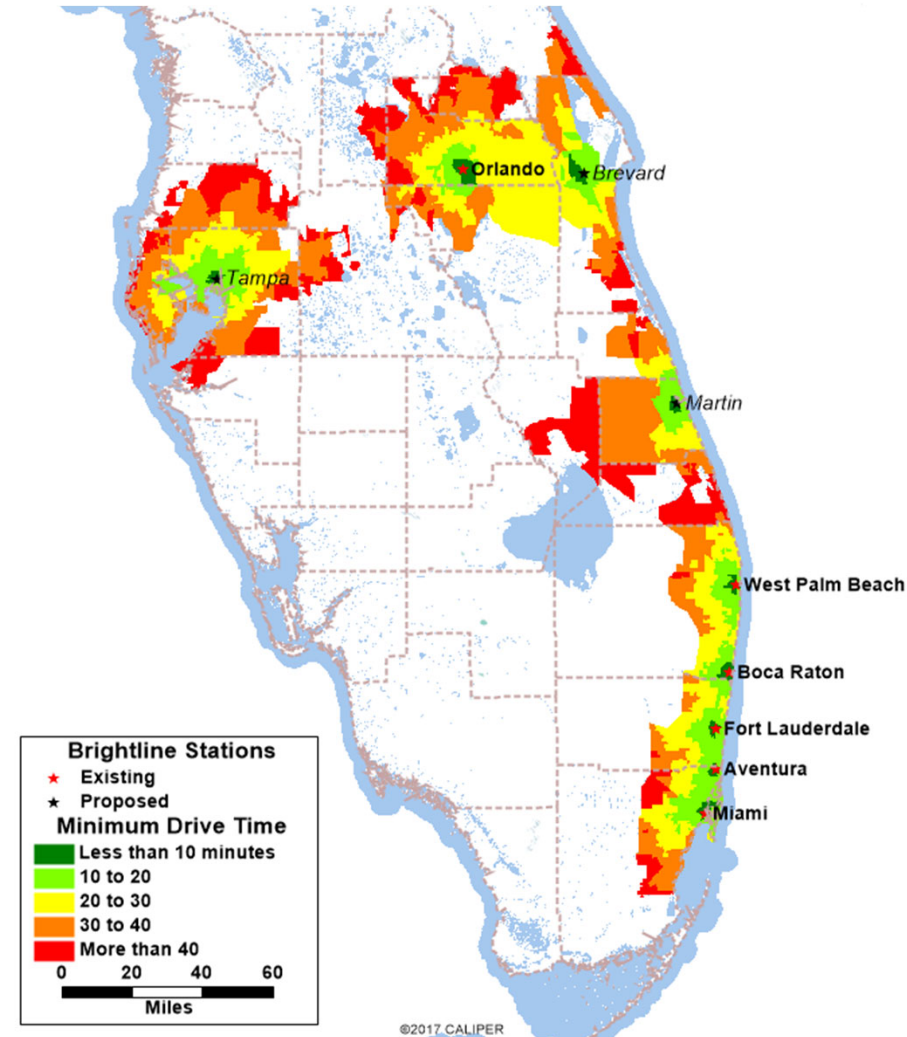


Source: Replica Data, 2022

Catchment Opportunity

Currently **29 million annual trips** between Cocoa catchment area and other Brightline station cities

Station Pair		Miles	Annual Trip Potential (Visitor, Social, Recreational, Work, Other Trips)
Cocoa	Miami	199	475,000
Cocoa	Aventura	192	188,000
Cocoa	Ft Lauderdale	181	398,000
Cocoa	Boca Raton	162	383,000
Cocoa	West Palm Beach	138	851,000
Cocoa	Treasure Coast	80	4,613,000
Cocoa	Orlando	38	21,126,000
Cocoa	Tampa	118	1,430,000
Cocoa	All Stations		29,464,000



Source: HDR analysis of Replica data, 2023.

Station Site Development



Benefits of Transit Oriented Development (TOD)



- **Increases commercial and residential property values**
- **Drives private investment** due to transit access
- **Strengthens local economies**
- Improves **sustainability** and **resilience**
- Conserves **land** and **resources**
- Develops **placemaking**
- Builds **social ties**

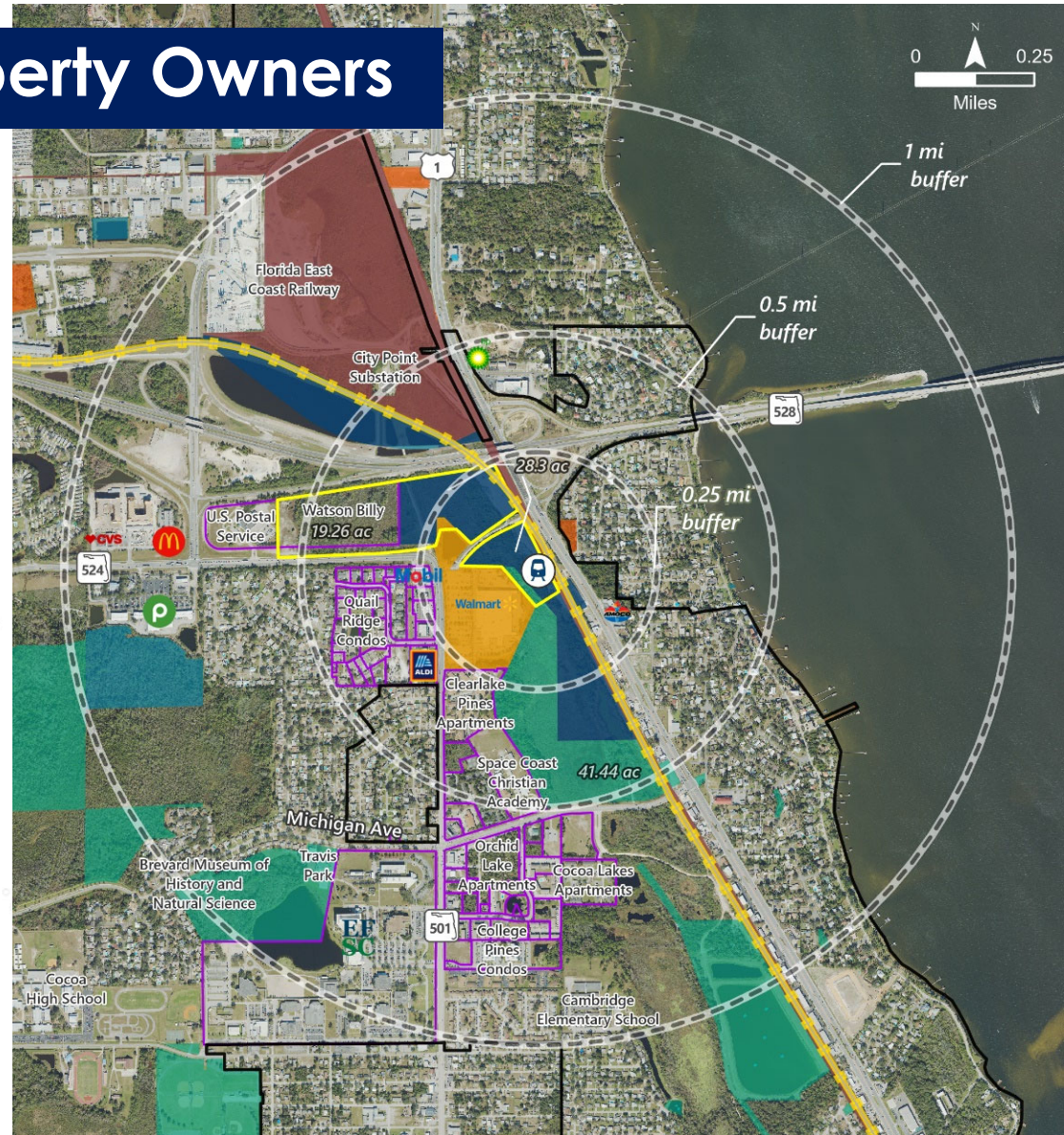


San Jose, CA

Developable Area and Property Owners

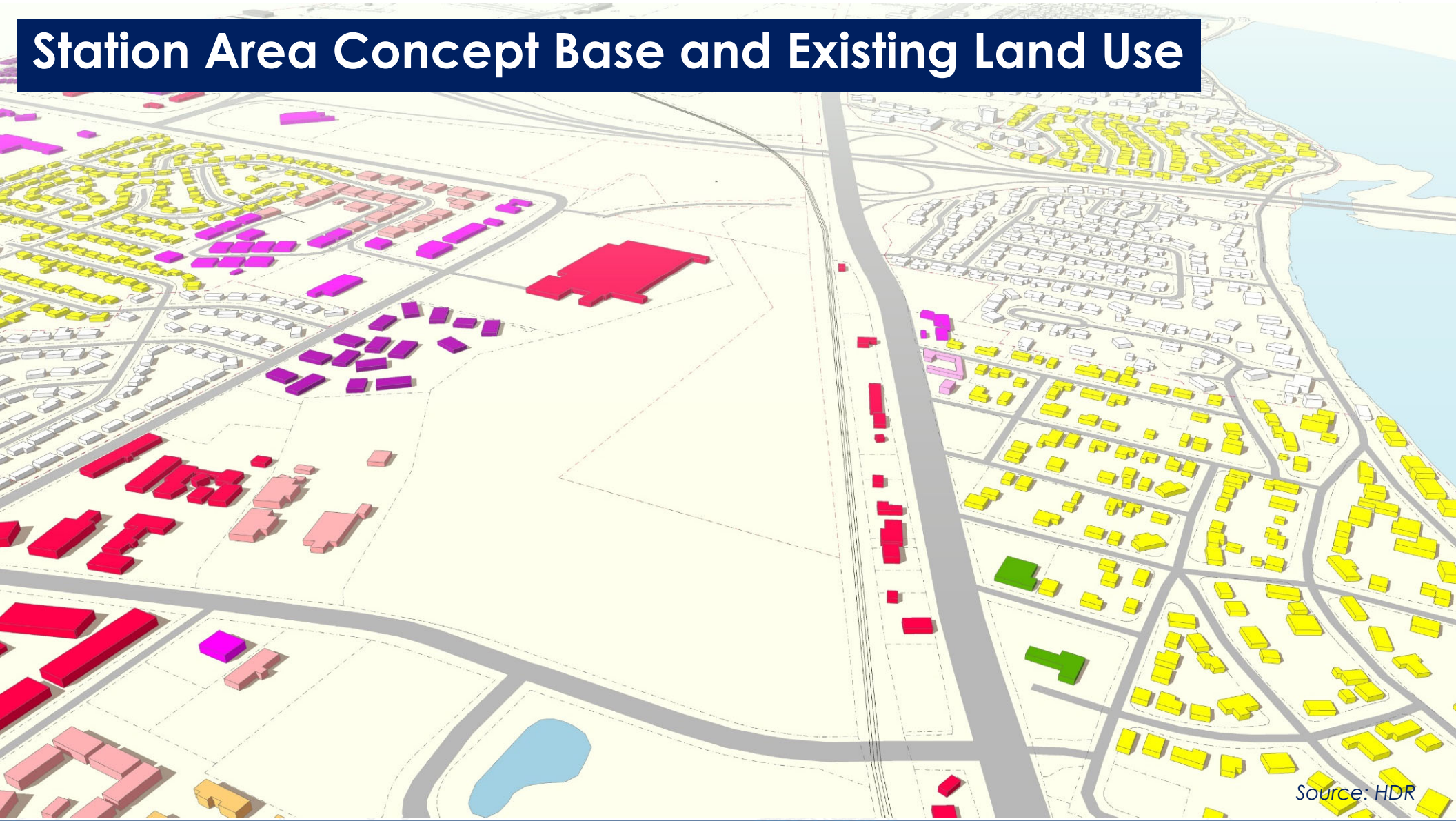
- **48 acres** of developable area – shown in yellow outline
- Purchase/property agreements needed
- Potential for surrounding **property increases between 4% and 40%**

(Source: The Real Estate Mantra –Locate Near Public Transportation, October 2019, APTA and National Association of Realtors)



Source: HDR analysis and Brevard County Property Appraiser

Station Area Concept Base and Existing Land Use



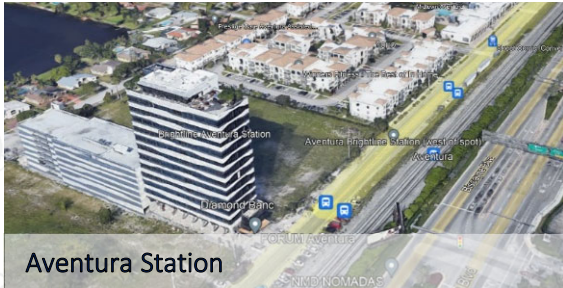
Source: HDR

Station Area Concept Base with Aerial



Source: HDR

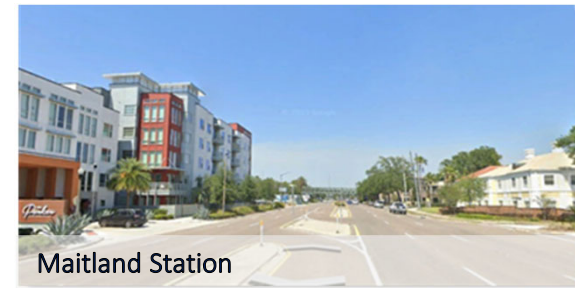
Sample Stations



Aventura Station



West Palm Beach Station (side street)



Maitland Station



Longwood Station



Winter Park Station



City Place Shopping Street



Cocoa Shopping Street

The **density** required to support stations can be at a scale that is primarily medium to higher density **and** complimentary to local neighborhood shopping streets.

Existing Brightline Stations



Station: West Palm Beach

Station: Aventura

