

2045 Tri-County Transportation Plan MetroQuest Survey Results



DRAFT



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Chapter 1 – Introduction

It's TIME Tampa Bay is a collaboration of the Metropolitan Planning Organizations (MPOs) of Hillsborough, Pasco, and Pinellas Counties. Federal law requires MPOs to evaluate trends, project future growth, and identify fiscally constrained multimodal transportation investments for the next 20 plus years as part of their Long Range Transportation Plan (LRTP) update. **It's TIME Tampa Bay** represents the first tri-county planning initiative the three counties have undertaken as part of the 2045 LRTP planning process. Together, the MPOs are addressing regional mobility needs in an effort to ensure that connections to jobs, universities, healthcare, airports, state parks and the beaches are accessible to everyone. Each MPO will utilize the results of the tri-county public outreach effort to help identify county-specific, and cross-county, projects that support and enhance regional mobility.



Public Outreach

The Hillsborough, Pasco and Pinellas MPOs embrace public outreach as it is a critical step to inform the LRTP development process and helps to ensure the LRTP reflects community values, and overall vision. As such, the MPOs together selected an online survey platform – **MetroQuest** – as the primary public outreach tool for the **It's TIME Tampa Bay** initiative.

The MetroQuest survey provided the public the opportunity to weigh in on:

- transportation and growth priorities,
- three exaggerated future year growth scenarios
- and a variety of potential roadway and transit projects, community development and funding options.

No single scenario will solve the transportation and mobility needs of the tri-county area—it will take a combination of investments to move people and goods around the region, both today and even more so in the future when the three-county area will add over one million in population. The



purpose of this survey was to help the MPOs identify the best ideas, projects, and policies to evaluate further as part of the 2045 LRTP development that will be completed in 2019.

Toward this end, each MPO will continue to conduct transportation planning for their communities and neighborhoods, in coordination with local city and county land-use planning. Some current/recent examples include the [Brandon Corridors & Mixed-Use Centers](#) study in Hillsborough, the [Master Plan for Gateway/Mid-County](#) in Pinellas, and the [Wesley Chapel Roadway Connection](#) study in Pasco. The **It's TIME Tampa Bay** survey builds off these local planning and regional planning initiatives in an effort to address these basic questions:

How can the Tampa Bay area, from a mobility and development standpoint, best prepare for a thriving future?

How should we prepare our region for the next generation?

Why it's TIME!

Already among the top 20 most populated regions in the country, the Tampa Bay area is also one of the fastest growing in the country. Visit any part of the tri-county area and you will experience the growth firsthand: construction in Downtown Tampa, St. Petersburg, Wesley Chapel, and numerous other locations. Residents and visitors to our area feel the impacts of this growth on a daily basis as traffic levels continue to increase and daily commutes become longer. **Add an additional one million in population to the tri-county area over the next 20 plus years and it is easy to see that now is the time to act to address our regional mobility and travel needs!**



Chapter 2 – Survey Overview

The MetroQuest survey consisted of five screens: Welcome, Priorities, Scenarios, Elements, and Wrap-up. Each screen setup/design, and the corresponding survey results, is discussed in the following chapters.

The **Welcome Screen**, displayed below, set the context for the project and encouraged people to participate. The visually appealing screen included a brief project background (see text below) and a call to action. The introduction pop-up box was the first information that visitors received when clicking on the survey located to the **It’s TIME Tampa Bay** website. In an effort to maximize participation, survey participants were eligible to win tickets to a Tampa Bay Buccaneers game, a Tampa Bay Lightning game, or to the performing arts as long as they provided a valid email address on the Wrap-up screen.



Introduction Pop-up Box

Take this survey for a chance to win tickets to see the Bucs, Lightning, or the arts. Tell us your thoughts about three land use and transportation growth scenarios.

I'm Ready!

MetroQuest

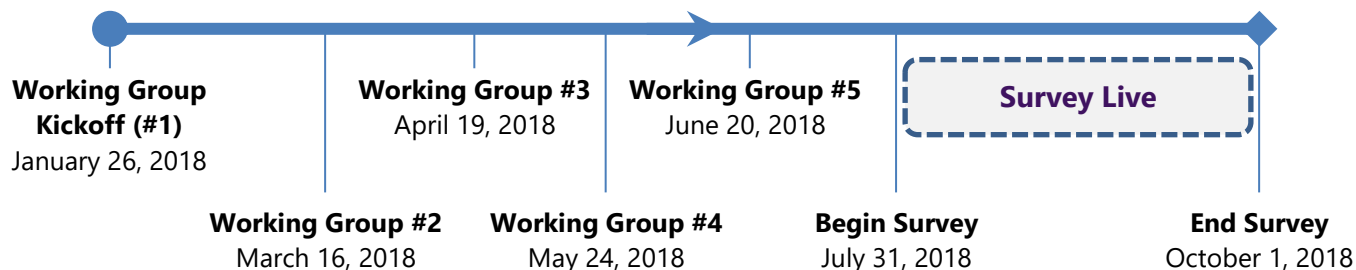
Welcome Screen – Project Background

Transportation, Innovation, Mobility for Everyone!
 Transportation, land use, and funding are important challenges in our region. By 2045, our region will have over a million more people living and working here. Hillsborough, Pasco and Pinellas counties would like your input on three growth scenarios. Individual elements of each scenario may be combined into a final regional plan.

It will take a combination of investments to move people around our region, both today and in the future. Please take a few minutes to tell us your views on the region’s future transportation system.

Survey Development/Collection

Development of the MetroQuest survey began in late January 2018. The three MPOs formed a working group comprising staff from the Hillsborough, Pinellas and Pasco MPOs, along with other stakeholders and project consultants. The working group met five times between January and June, with the survey going live at the end of July and ending early October.

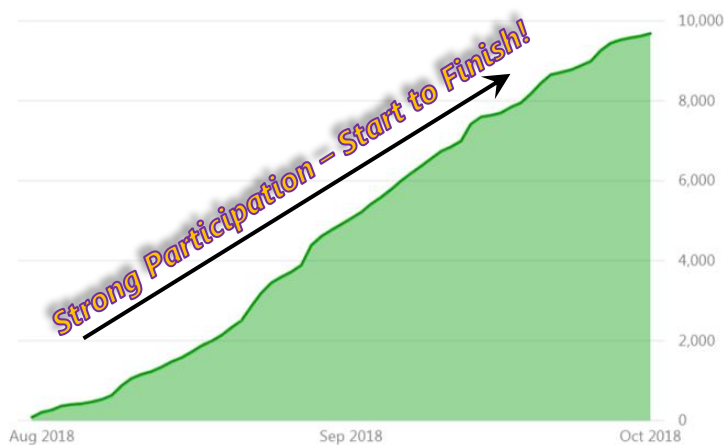


The working group reviewed various MetroQuest screens, survey text and images, draft surveys and discussed potential outreach opportunities and marketing strategies. In May 2018, AECOM staff presented an overview of the survey to the Tampa Bay Transportation Management Area Leadership Group (TMA). In May and June, the MPOs conducted testing of the draft survey to check for understanding, ease of use, and to determine the approximate time to complete the survey. Based on feedback, the working group made edits to simplify and shorten the survey. The MPOs approved a final survey in mid-July and MetroQuest completed their final testing the last week of July.

The MetroQuest survey went live on July 31, 2018 and closed October 1, 2018. Over this two-month timeframe, there were 17,762 visitors that clicked on the survey link and 9,666 people answered at least some survey questions. This 54.4% participation rate generally falls in the range for most MetroQuest surveys.

The approximately 9,600 participants set a new MetroQuest record for surveys conducted in the United States!

Following a standard review and survey clean-up, the final dataset included 9,575 participants. This set a new record for MetroQuest survey participation in the United States. In total, there were 234,884 data points collected, 10,471 comments provided and over 5,600 participants provided their email address and were eligible to win football, hockey or performing arts tickets. The graph on the right displays strong participation from start to finish due to a strong and steady outreach effort.



The survey ended up with **33 straight days with over 100 responses per day** (August 13th to September 14th) and **the most responses for a single day (500 participants) were recorded on August 28th**.

Public Outreach

The MetroQuest survey was available through the **It's TIME Tampa Bay** website (itstimetampabay.org) created specifically for the survey. The website was hosted by the Hillsborough MPO and promoted on the Pinellas and Pasco MPOs websites. The MPOs also worked closely with local media outlets to promote the survey and wish to thank the following marketing partners for a successful campaign.

Marketing Partners



The working group also developed and reviewed alternative public outreach tools and activities to spread the word and to generate interest in the planning process. Staff from the three MPOs developed a wide range of outreach activities in an attempt to maximize participation representative of the communities within the tri-county area. The following highlights these activities.

- A matching paper survey, and corresponding PowerPoint slideshow, to provide an alternative method to complete the survey
- A Spanish translation of the paper survey and PowerPoint slideshow
- Facebook (265,000 impressions), Twitter (46,000 impressions) and Instagram (54,000 impressions) campaigns throughout the majority of the survey to encourage residents to visit the **It's TIME Tampa Bay** website to complete the survey (34% of the visits to the website came from social media)
- Promotional **It's TIME Tampa Bay** video to encourage individuals to take the survey
- **It's TIME Tampa Bay** ad in the Tampa Bay Times newspaper
- MPO-staffed booth at Florida's Largest Home show over Labor Day weekend (resulting in nearly 700 surveys being completed over the holiday weekend)
- Participation of Beth Alden (Hillsborough MPO Executive Director) and Whit Blanton (Forward Pinellas Executive Director) on a radio talk show (The Current with Roxanne Wilder on Q105) to discuss regional transportation and mobility issues, and to promote the survey
- Hillsborough MPO-printed rack cards included with the Property Appraiser's True in Millage (TRIM) notice, mailed countywide to approximately half million property and business owners
- Pinellas utilized the Nextdoor app to reach communities throughout Pinellas County and also delivered utility mailers to account holders throughout the county.
- Pasco MPO-developed video to highlight the importance of taking the survey to discuss regional travel issues between the three counties
- Numerous Pinellas MPO-posted Facebook advertisements encouraging residents to have their voice heard by completing the survey

- MPO attendance at various small group/community meetings to inform them about the survey, and in some cases to take the survey (Hillsborough MPO attended over 80 meetings)

Chapter 3 – Survey Participation

The two-month survey run resulted in a large dataset that yielded useful information to help inform the LRTP development process. In total, 9,575 surveys were analyzed. Of this total, 6,544 (68%) provided a home zip code that was located within the tri-county area. Home zip codes were assigned to one of the three counties based on United States Postal Service (USPS) classifications. For example, some zip code boundaries cross county lines, in particular along the Hillsborough-Pasco County line, and as such the survey results were assigned to one county based on the USPS classification.

Figure 1 and Table 1 summarize the overall survey results, by county, as compared to the population of the tri-county area. Hillsborough County respondents represented 61% of all survey responses, which is approximately 13 percentage points higher when comparing the share of survey responses to share of tri-county population.

It is also worth noting that over 3,000 surveys were completed that either did not include a home zip code or included a home zip code outside the tri-county area (these surveys could represent individuals who work in the tri-county area, or travel to or through the area on a regular basis, or some respondents simply may not have wanted to provide their zip code information).

Figure 2 displays the distribution of survey responses by home and work zip code.

Figure 1. Survey Response vs. 3-County Area Population

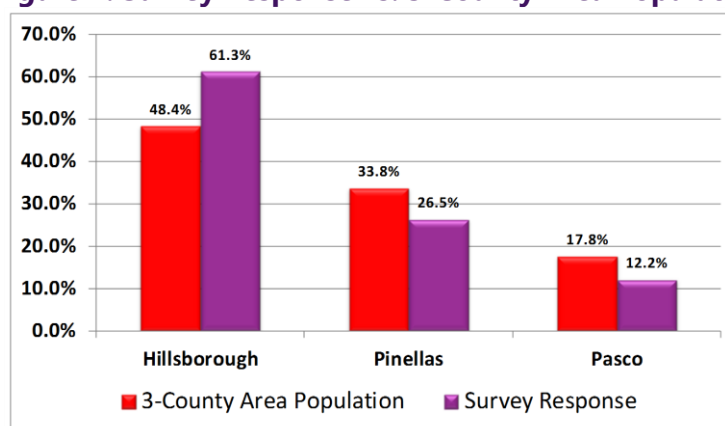


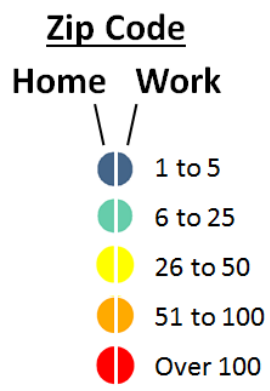
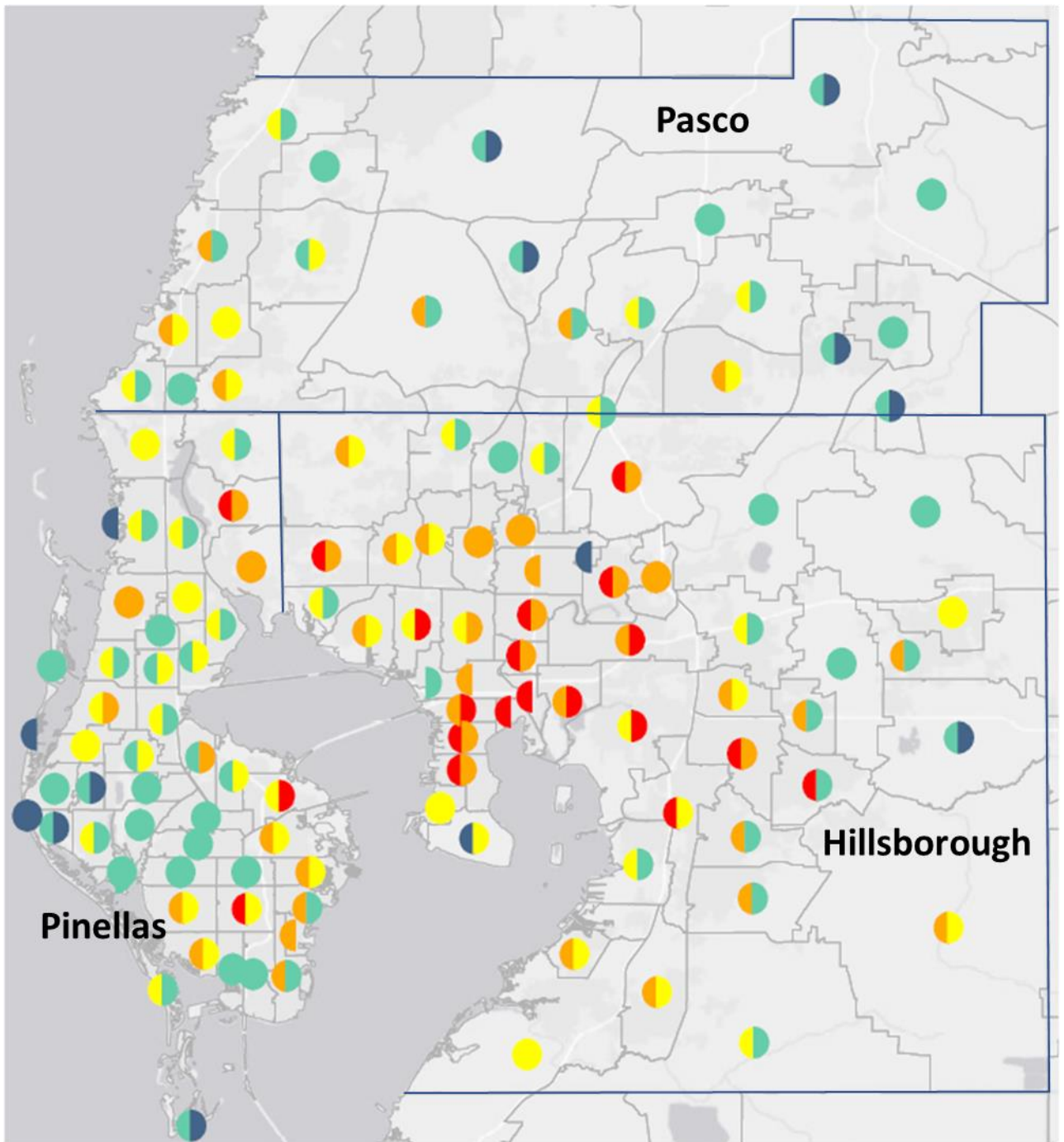
Table 1. Survey Response Overview

County	3-County Area		Survey		
	Population ¹	Percentage	Participants ²	Percentage	Difference
Hillsborough	1,379,302	48.4%	4,012	61.3%	12.9%
Pinellas	962,003	33.8%	1,731	26.5%	-7.3%
Pasco	505,709	17.8%	801	12.2%	-5.5%
Total	2,847,014		6,544		

¹ SOURCE: BEBR, Bulletin 181, Population Projections by Age, Sex, Race & Hispanic Origin for Florida & Its Counties, 2020 - 2045 with Estimates for 2017 (June 2018).

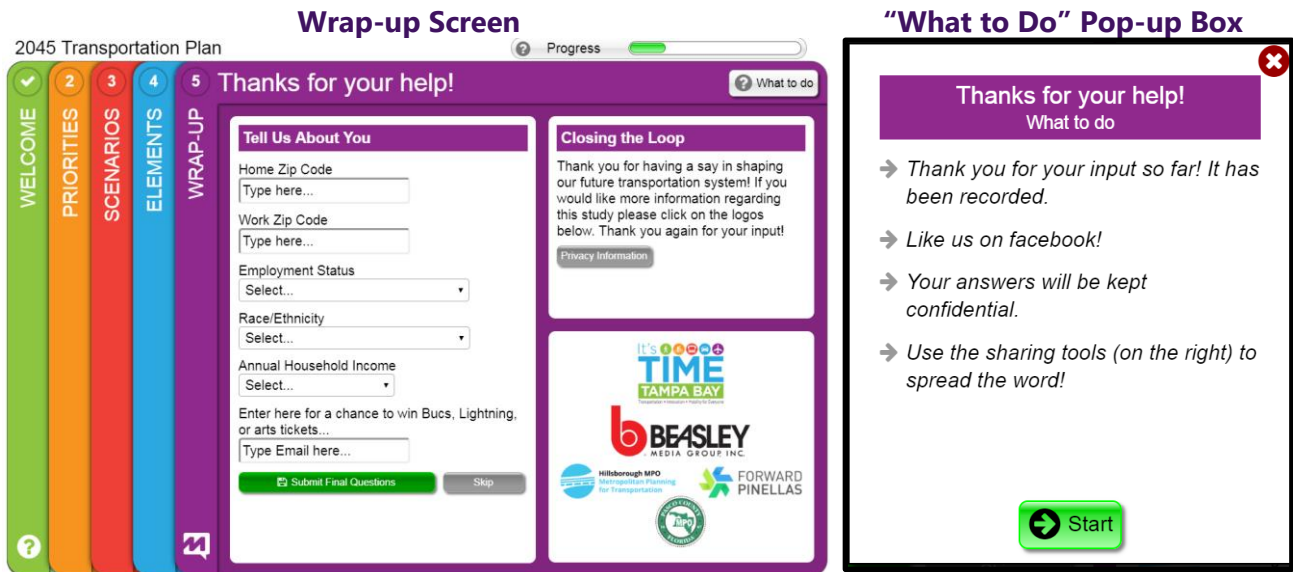
² Survey participants who provided their home zip code.

Figure 2. Survey Response (by Home and Work Zip Code Provided)



Representative Coverage

It was very important to the MPOs to conduct a survey that—from a demographic and geographic coverage standpoint—reflected the tri-county planning area to the best degree possible. The Wrap-up screen collected general demographic data that was useful in better understanding the survey responses for the priorities, scenarios and elements. Providing demographic data was optional and if someone did not answer these questions their already completed survey responses and comments were still recorded and analyzed as part of the final dataset.



- **Home Zip Code**
- **Work Zip Code**
- **Employment Status**
 - Employed Full-time
 - Employed Part-time
 - Currently Unemployed
 - Retired (full-time FL resident)
 - Retired (part-time FL resident)
 - Student
- **Race/Ethnicity**
 - White
 - Black, or African American
 - Hispanic, Latino or Spanish origin
 - Asian
 - American Indian or Alaskan Native
 - Native Hawaiian or Other Pacific Islander
 - Other
- **Annual Household Income**
 - \$39,999 or less
 - \$40,000 to \$54,999
 - \$55,000 to \$99,999
 - \$100,000 to \$199,999
 - \$200,000 or more
- **Email**
 - If a valid email address was provided, the participant was eligible to win tickets to a Tampa Bay Buccaneers game, a Tampa Bay Lightning game, or a performing arts event.

Privacy Statement

The following privacy statement was included on the Wrap-up screen:

Under Florida law, email addresses are public records. If you do not want your email address released in response to a potential public records request, please do not submit your email address. In accordance with Title VI of the Civil Rights Act of 1964 and other nondiscrimination laws, public participation is solicited without regard to race color, national origin, age, sex, religion, disability, or family status. Read more about the MPO's commitment to non-discrimination and other requirements.

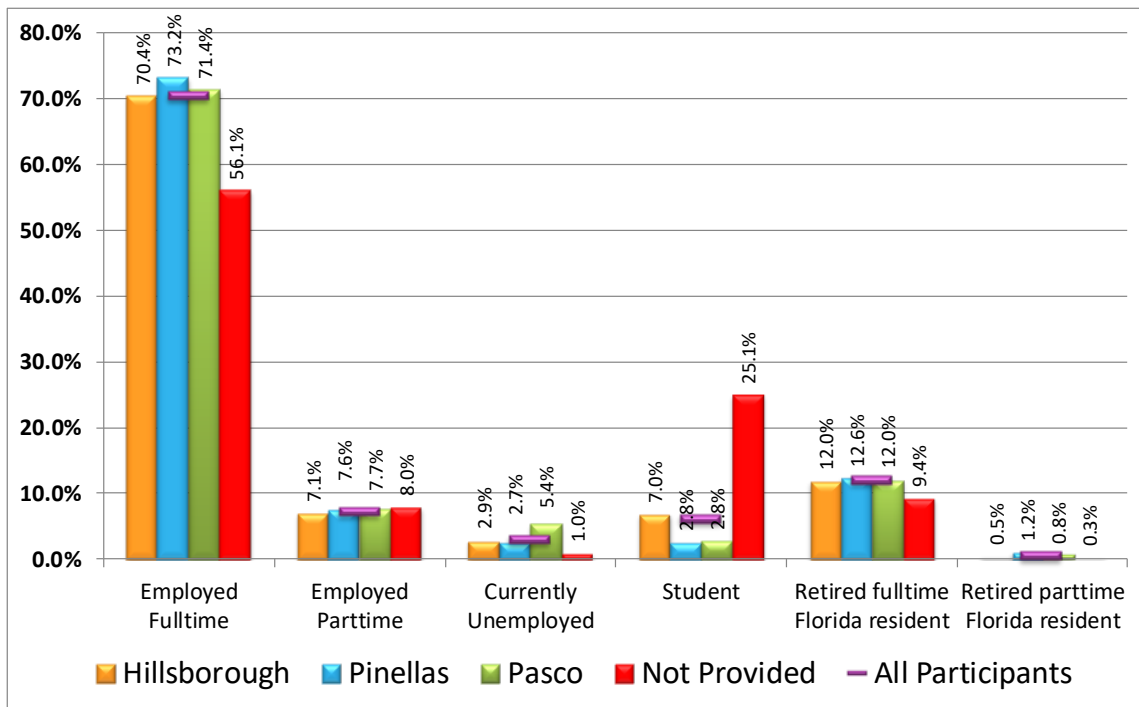
Survey Responses by Demographics

The following sections provide a breakdown of survey responses by employment status, annual household income, and race/ethnicity.

Employment Status

Figure 3 shows that full-time employed residents represented the majority of survey respondents (approximately 70%). A portion of the respondents who did not provide their home zip code could have been students participants. Survey respondents who identified as currently unemployed represent approximately 3% of all respondents. This is consistent with the unemployment rates in the region which range between 3% and 5%. Full-time retired respondents represented about 11% of the survey responses, while less than 1% identified themselves as a part-time retired Florida resident. Given this small response rate, the part-time retired Florida residents were combined with the full-time retired Florida residents for the purpose of further survey analysis.

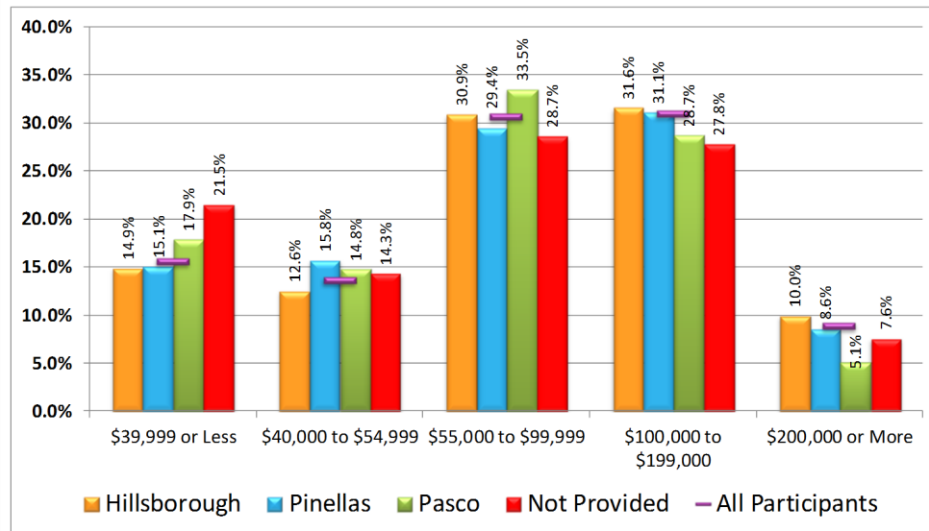
Figure 3. Participants by Employment Status



Annual Household Income

Figure 4 shows that 70% of survey respondents have an annual household income over \$55,000, and 40% have an income over \$100,000. In general, the survey responses represent a more affluent population as compared to the region's average, or median income level. For those survey respondents who did not provide a home zip code, 21% indicated that they had an annual household income under \$39,999.

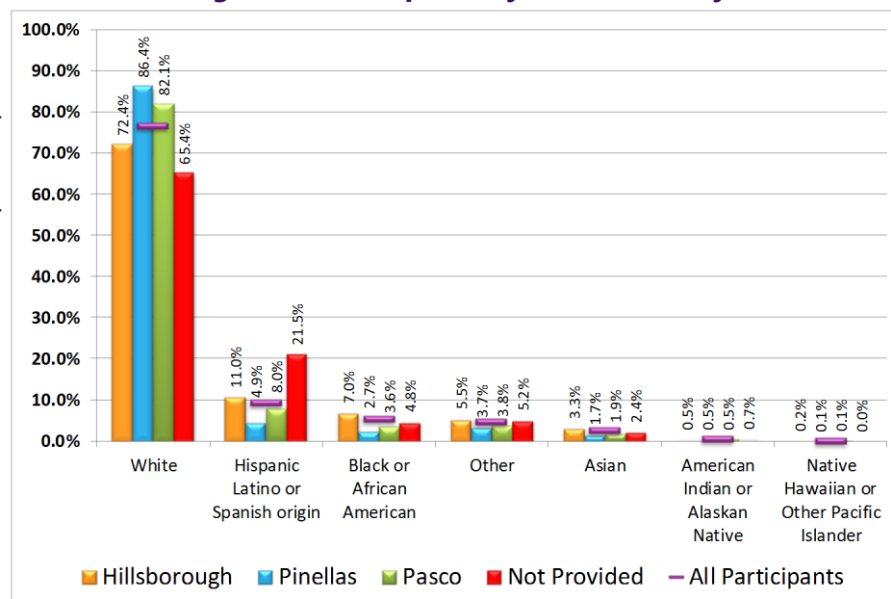
Figure 4. Participants by Annual Household Income



Race/Ethnicity

Figure 5 shows that approximately 77% of all survey respondents identified as white. Pinellas County tended to have a slightly higher white response rate at 86%, while Hillsborough County reported in at 72%. Hillsborough County had the highest response rate by minority populations including 11% who identified as Hispanic, Latino or Spanish origin, and 7% who identified as African American. While these percentages are lower compared to the County totals, they do reflect an extensive outreach effort to try to maximize the survey participation rate among minority groups.

Figure 5. Participants by Race/Ethnicity

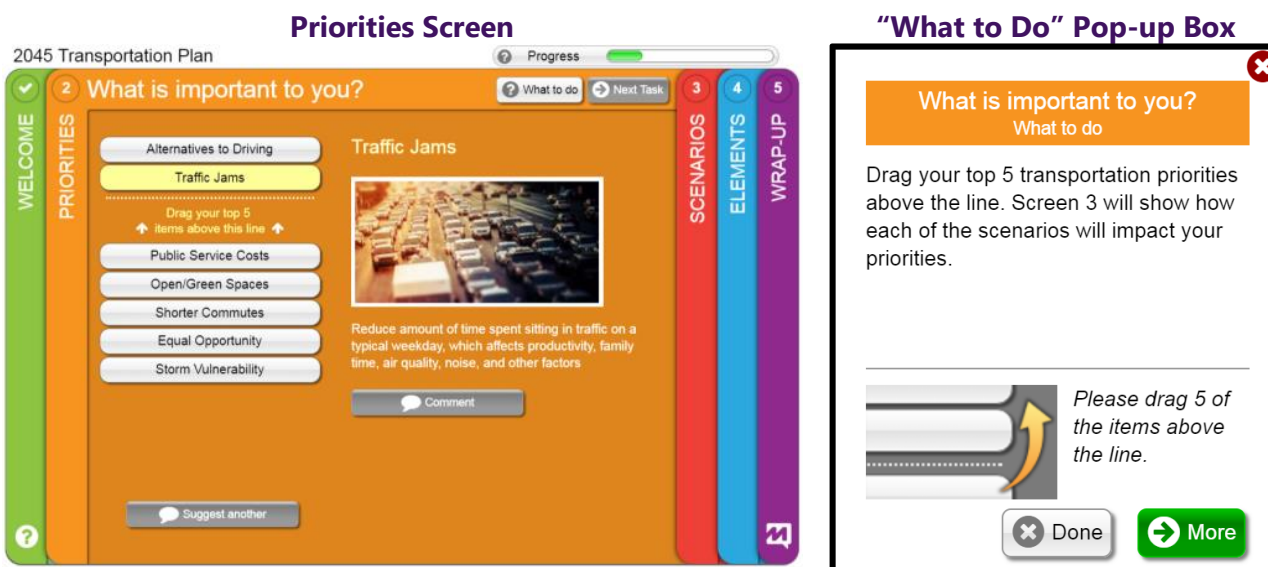


Emails

Over 5,600 emails were provided and were eligible for the drawing. A drawing to select the winners was held at a meeting of the Hillsborough MPO Board on Tuesday, October 2, 2018.

Chapter 4 – Priorities

The second screen of the **It's TIME Tampa Bay** survey (What is Important to You?) included seven priorities. Survey respondents were asked to identify their top five priorities; however, respondents could identify less and still continue on the next screen. The respondents' priorities were then used on the Scenarios screen to show the impact that each scenario has on each selected priority (additional information provided in Chapter 5). The following images display the Priorities screen, along with the "What to Do" pop-up box.



In total, priorities were ranked 39,645 times by all survey participants, which equates to an average of 4.1 priorities identified per survey respondent. The **It's TIME Tampa Bay** priorities and descriptions, as presented in the survey, are listed on the following page. A summary of the top priorities follows the descriptions.

Comment from Hillsborough Resident (commenting on Traffic Jams)

"More than anything else I would like to not have to drive, with a shorter non-car dependent commute."

Comment from Pinellas Resident (commenting on Alternatives to Driving)

"Give us a city to city (St. Pete to Tampa) solution, where we can park in one city and go to the other."

Comment from Pasco Resident (commenting on Shorter Commutes)

"Expanding mass transit and other personal vehicle alternatives, especially to poorer and more underserved areas, would be a massive boon to our region and citizenry."

It's TIME Tampa Bay Priorities



Traffic Jams

Reduce amount of time spent sitting in traffic on a typical weekday, which affects productivity, family time, air quality, noise, and other factors.



Alternatives to Driving

Expand opportunities for walking, biking, buses and rail, carpooling and water ferries.



Shorter Commutes

Keep the economy moving by shortening commutes so people have access to jobs, and businesses have access to workers.



Open Space

Protect undeveloped lands, including wetlands and wildlife areas.



Public Service Costs

Efficiently manage growth to reduce the costs of building and maintaining new water supply lines, sewers, and local roads.



Equal Opportunity

Improve access to jobs and life-sustaining services for underserved communities.



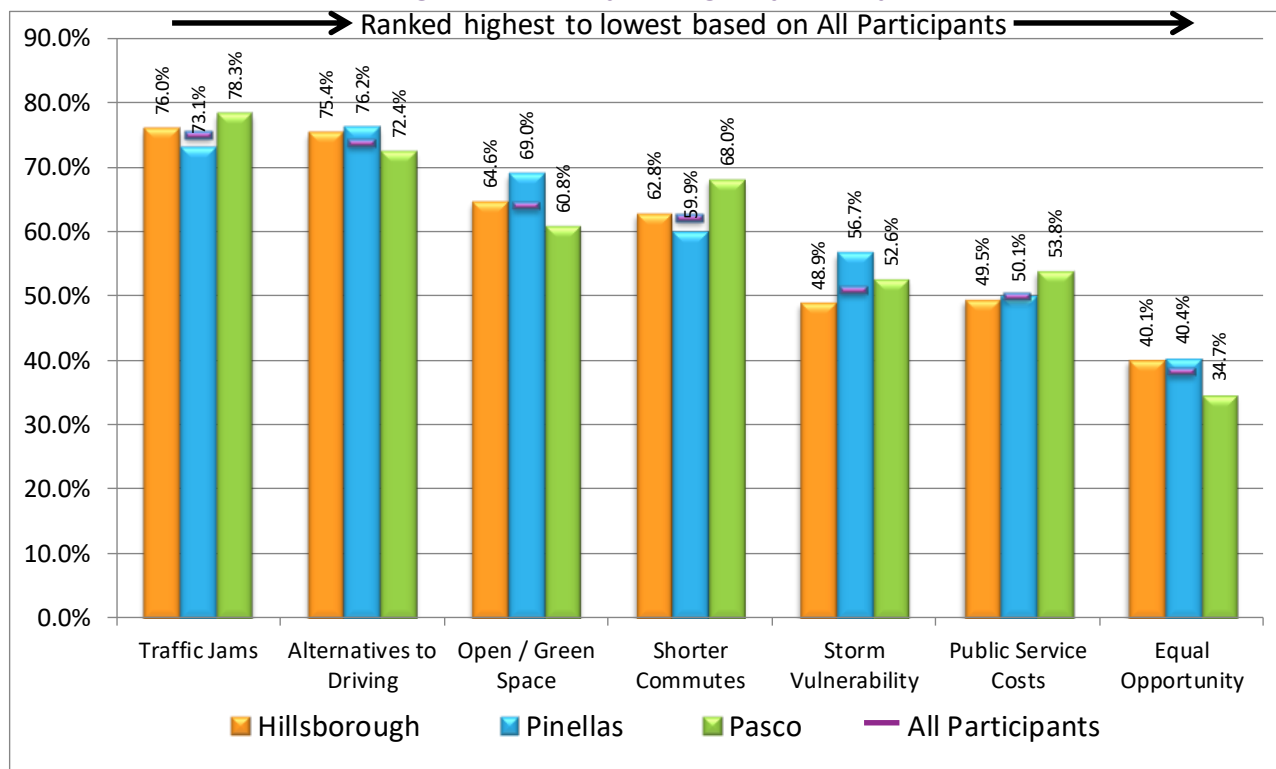
Storm Vulnerability

Minimize the number of people and jobs located in hurricane evacuation zones.

Top Priorities

Figure 6 summarizes the percentage of times that each priority was identified on screen 2 of the MetroQuest survey. The figure highlights the responses by county, as compared to the overall survey response by all participants. Traffic jams and alternatives to driving were identified as the top tier priorities. Of the 9,575 surveys, 7,184 (75%) respondents identified traffic jams and 7,059 (74%) respondents identified alternatives to driving as a top priority. Second tier priorities included open / green space which was identified 6,123 (64%) times by respondents, and shorter commutes, identified 5,956 times (62%).

Figure 6. Priority Ratings (by County)



Hillsborough and Pasco County respondents ranked traffic jams as the top priority while a slightly higher number of Pinellas County respondents identified alternatives to driving as their top choice. Pasco County respondents slightly favored shorter commutes as their third priority (over open /green space).

One additional item of note: 57% Pinellas County respondents identified storm vulnerability as a top priority – eight percentage points higher than Hillsborough County respondents and four percentage points higher than Pasco County respondents.

Table 2 on the following page provides a detailed breakdown of the priority ratings.

Table 2. Priority Ratings (Detailed Breakdown)

Number of Times Identified as a Top 5 Priority

	All Participants	Hillsborough	Pinellas	Pasco
Traffic Jams	7,184	3,049	1,265	627
Alternatives to Driving	7,059	3,024	1,319	580
Open / Green Space	6,123	2,593	1,195	487
Shorter Commutes	5,956	2,520	1,037	545
Storm Vulnerability	4,883	1,963	982	421
Public Service Costs	4,768	1,985	868	431
Equal Opportunity	3,672	1,607	700	278
	39,645	16,741	7,366	3,369
Average Number of Priorities Rated:	4.14	4.17	4.26	4.21

NOTE: Darker to lighter green shading (or no shading) indicates the highest to lowest totals.

Percentage of Times Identified as a Top 5 Priority

	All Participants	Hillsborough	Pinellas	Pasco
Traffic Jams	75.0%	76.0%	73.1%	78.3%
Alternatives to Driving	73.7%	75.4%	76.2%	72.4%
Open / Green Space	63.9%	64.6%	69.0%	60.8%
Shorter Commutes	62.2%	62.8%	59.9%	68.0%
Storm Vulnerability	51.0%	48.9%	56.7%	52.6%
Public Service Costs	49.8%	49.5%	50.1%	53.8%
Equal Opportunity	38.3%	40.1%	40.4%	34.7%
Surveys by All Participants/County:	9,575	4,012	1,731	801

Distribution of Responses by Category

Row Labels	All Participants	Hillsborough	Pinellas	Pasco
Traffic Jams	18.1%	18.2%	17.2%	18.6%
Alternatives to Driving	17.8%	18.1%	17.9%	17.2%
Open / Green Space	15.4%	15.5%	16.2%	14.5%
Shorter Commutes	15.0%	15.1%	14.1%	16.2%
Storm Vulnerability	12.3%	11.7%	13.3%	12.5%
Public Service Costs	12.0%	11.9%	11.8%	12.8%
Equal Opportunity	9.3%	9.6%	9.5%	8.3%

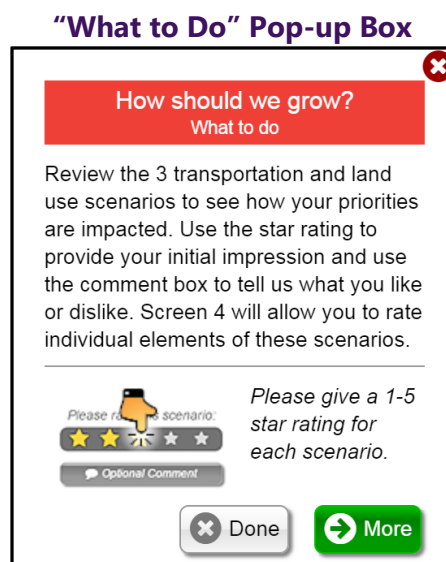
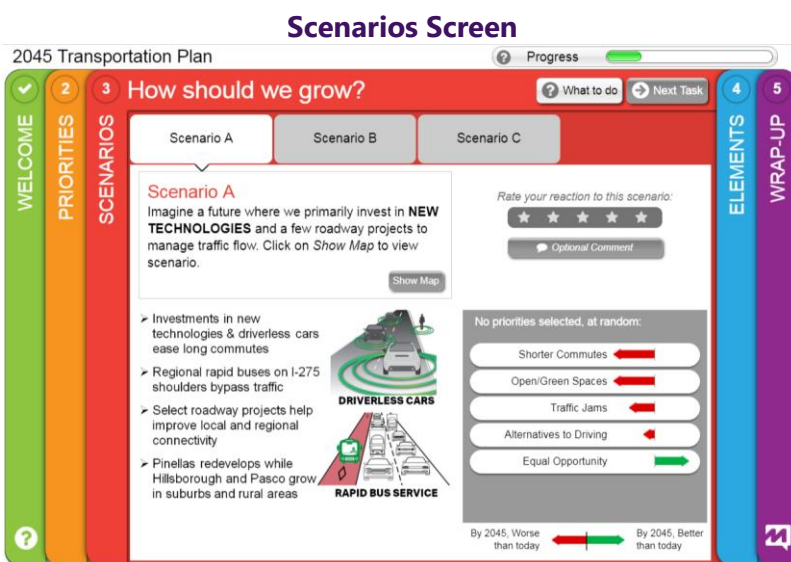
Chapter 5 – Scenarios

The Scenarios in screen 3 were created to facilitate discussion of three potentially different growth and transportation futures. The intent was to present exaggerated scenarios that would make participants consider the choices/consequences associated with future growth and development, and to ultimately view how each scenario could potentially impact their priorities, and future transportation and mobility options. In some cases, the project elements identified in the scenarios were inspired by other agencies’ studies, such as:

- Tampa Bay Next
- Regional Transit Feasibility Plan

Other scenario projects may include options that are not currently being explored by the sponsoring agency, but were listed nonetheless because they could provide useful insight into what is important to the public. While each scenario is rated from 1 to 5 stars, participants are not rating individual projects; instead they are rating overall themes associated with each scenario to help inform the LRTP development process. Ultimately, one scenario will not solve the region’s transportation and mobility issues. It will require a wide range of strategies and policies, addressing both growth and infrastructure, to shape the future transportation system.

The Scenarios screen started by asking the general question **“How should we grow?”** Based on the priorities a respondent selected on screen 2, the impacts of the transportation and growth on that scenario were communicated by arrows. A red arrow pointing left indicated that particular priority would perform worse than today, by the year 2045. A green arrow pointing right indicated that particular priority would perform better than today, by the year 2045. In both situations, the longer the arrow, the greater negative or positive the impact. Furthermore, participants were encouraged to provide comments that could be used to better understand the survey responses. The scenarios are summarized on the following pages.

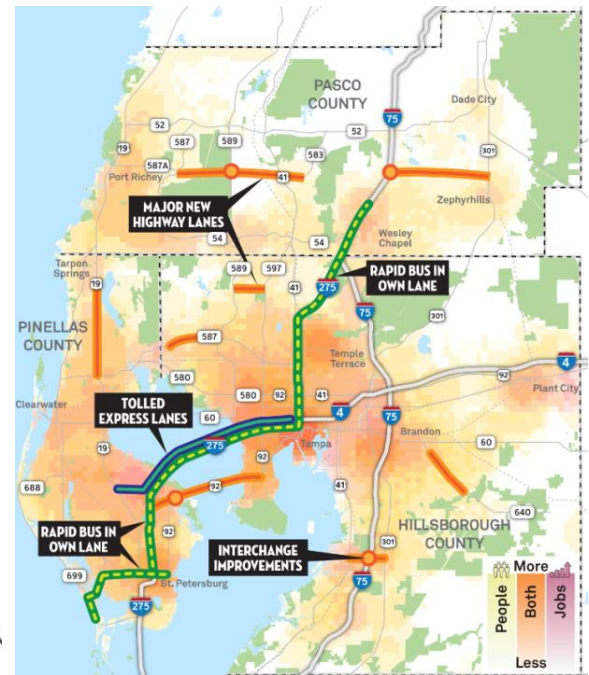
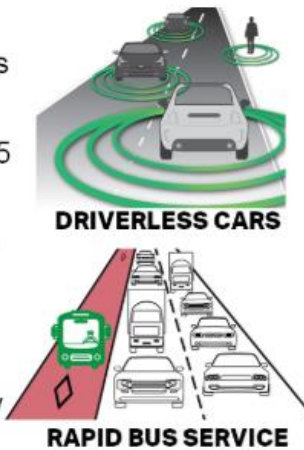


It's TIME Tampa Bay Scenarios

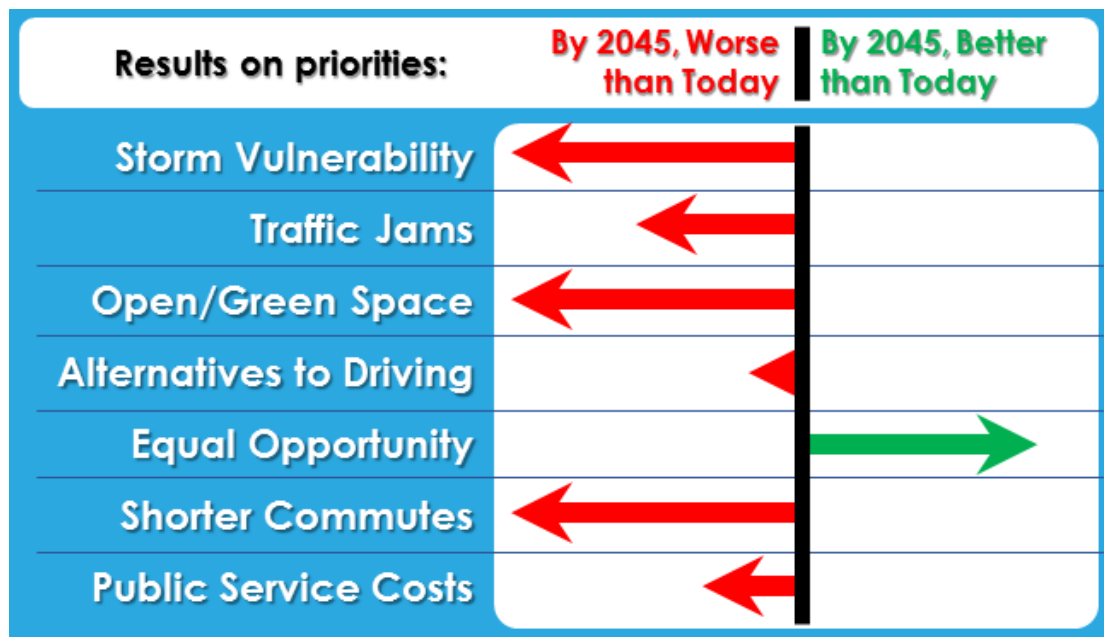
Scenario A

Imagine a future where we primarily invest in **NEW TECHNOLOGIES** and a few roadway projects to manage traffic flow.

- Investments in new technologies & driverless cars ease long commutes
- Regional rapid buses on I-275 shoulders bypass traffic
- Select roadway projects help improve local and regional connectivity
- Pinellas redevelops while Hillsborough and Pasco grow in suburbs and rural areas



Scenario A Impact on Priorities

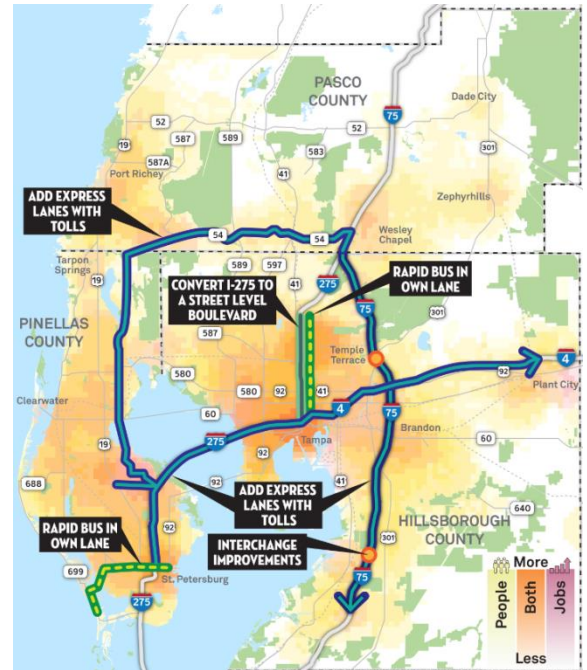
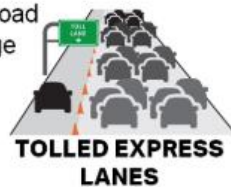


It's TIME Tampa Bay Scenarios

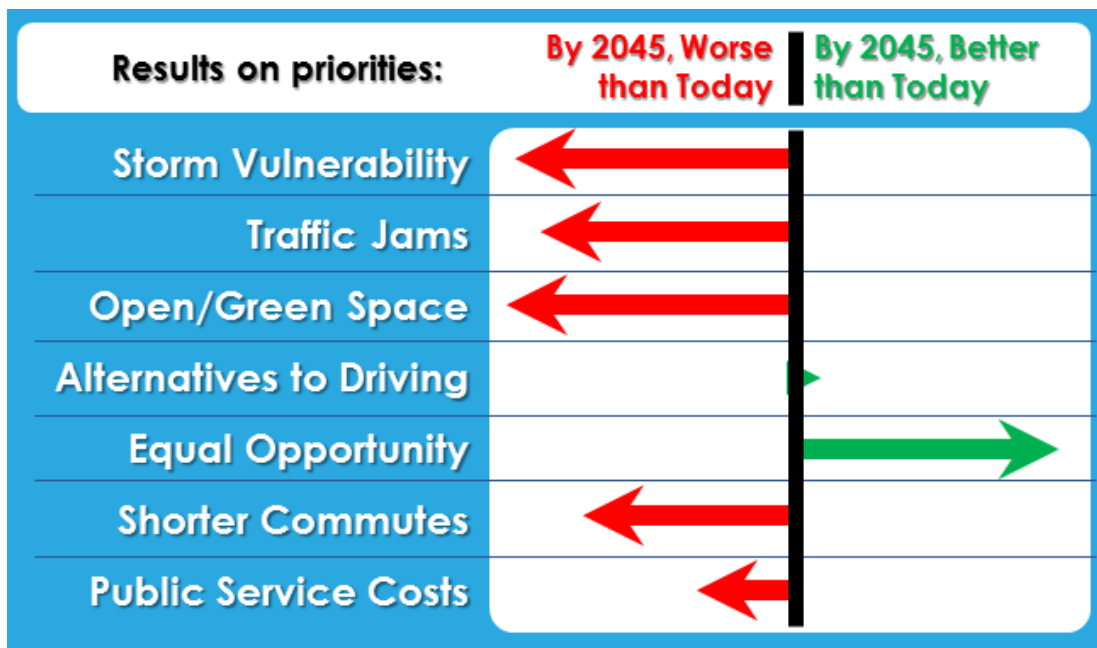
Scenario B

Imagine a future where we primarily invest in EXPRESSWAY LANES forming an outer loop so traffic does not have to go through the congested center of the region.

- New tolled express lanes create a loop linking the three counties
 - SR 54 (Pasco) to McMullen-Booth Road (Pinellas) to Howard Frankland Bridge to downtown Tampa (Hillsborough)
- North of downtown Tampa, I-275 converted to street-level boulevard
- Growth focused near expressway interchanges with some urban redevelopment



Scenario B Impact on Priorities

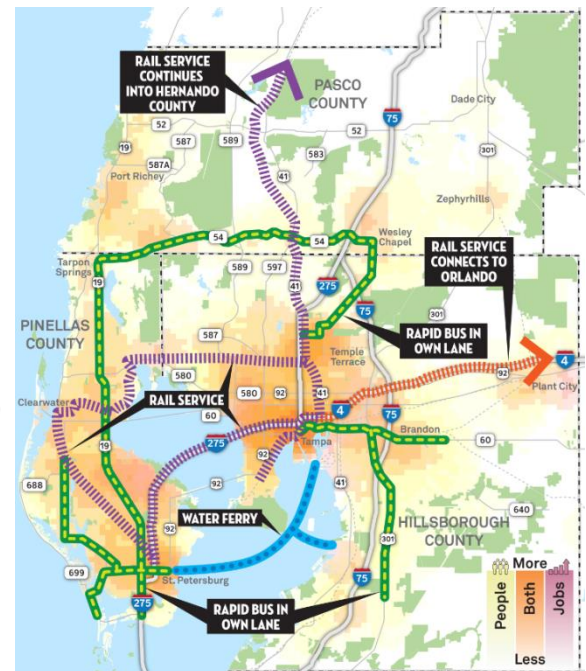


It's TIME Tampa Bay Scenarios

Scenario C

Imagine a future where we primarily invest in **BUS AND RAIL SERVICES** connecting, revitalizing and in-filling the communities that exist today.

- Significant bus and rail investments encourage redevelopment of housing and businesses in our cities & towns
- Rail service on existing train tracks connects the three counties and rapid bus service found on most major roads
- Rail service connects the region to Orlando
- Water ferry service connects Tampa and St. Petersburg, and MacDill AFB and South Hillsborough



Scenario C Impact on Priorities

Results on priorities:	By 2045, Worse than Today	By 2045, Better than Today
Storm Vulnerability		
Traffic Jams	←	
Open/Green Space	←	
Alternatives to Driving		→
Equal Opportunity		→
Shorter Commutes	←	
Public Service Costs		→

Scenario Results

The following sections summarize the survey results for the three scenarios. Respondents ranked the scenarios using a 1 to 5 scale, with 1 representing the least appealing score and 5 the most appealing. For the purpose of the presenting the results, the graphs combine the 1 and 2 ratings (low approval, or less favorable) and the 4 and 5 ratings (high approval, or more favorable).

Scenario A – New Technologies

Scenario A involved imagining a future that invested mostly in new technologies and a few select roadway projects to manage traffic flow. In total, 7,832 participants (3,702 from Hillsborough, 1,615 from Pinellas, and 727 from Pasco as defined by home zip code) rated this scenario. Figure 7 shows that overall survey respondents in general had a relatively neutral opinion of the new technologies scenario. Of all participants, 40% rated this scenario low with 1 or 2 stars. By comparison, 31% rated this scenario high at 4 or 5 stars. Figure 8 shows the average rating for Scenario A was 2.86. Pasco County respondents had a slightly higher favorable opinion of this scenario with a rating of 2.97.

Figure 7. Scenario A Rating (1 to 5 Stars)

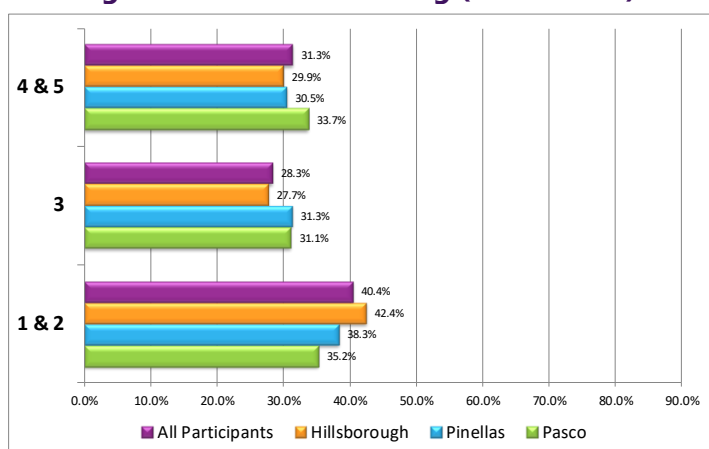
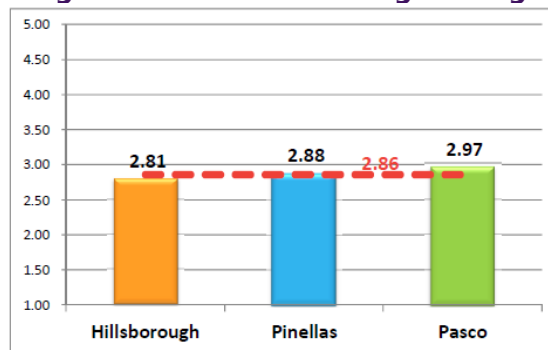


Figure 8. Scenario A Average Rating



Comment from Hillsborough Resident

(works outside the tri-county area)

“Want to see less vehicles and roads, not more. Would be further convinced of driverless transport if there was a positive impact on noise, smog, and congestion in highways.”

Comment from Pinellas Resident

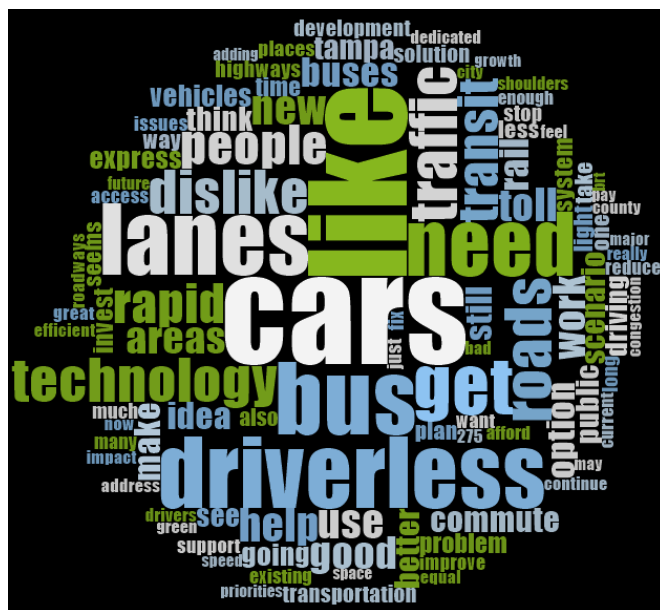
(works in Hillsborough County)

“While these solutions are nice on the surface and could certainly be utilized to relieve some of the transportation issues, I don’t think they address the root of the problems. They feel like band aids. I do like the idea of driverless cars, but I think we’re a ways away from people being comfortable with them and money could be better spent elsewhere (at least for now).”

Comment from Pasco Resident

(works in Pasco County)

“More emphasis on convenient, fast, efficient, mass transit, less on a ton of driverless vehicles on already jammed roads.”



Scenario C – Transit Focus (Bus and Rail)

Scenario C focuses on regional and statewide transit, mostly bus and rail, improvements. In total, 6,302 participants (3,210 from Hillsborough, 1,320 from Pinellas, and 547 from Pasco as defined by home zip code) rated this scenario. Figure 11 shows overwhelmingly support by survey respondents for this scenario. Of all participants, 75% rated this scenario high with 4 or 5 stars. Pinellas County respondents rated this scenario slightly higher at 78%. By comparison, only 12% of all respondents rated this scenario low at 1 or 2 stars.

Figure 12 shows the average rating for Scenario B was 4.08. Pasco County respondents had a slightly lower rating at 3.96 while Pinellas County respondents rated this scenario slightly higher at 4.16.

Figure 11. Scenario C Rating (1 to 5 Stars)

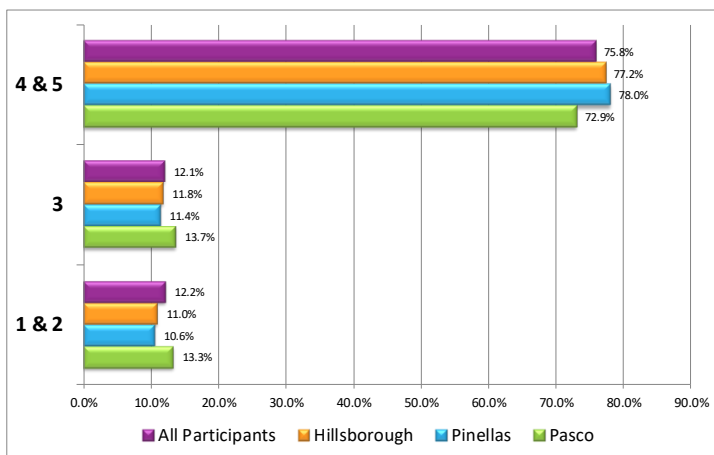
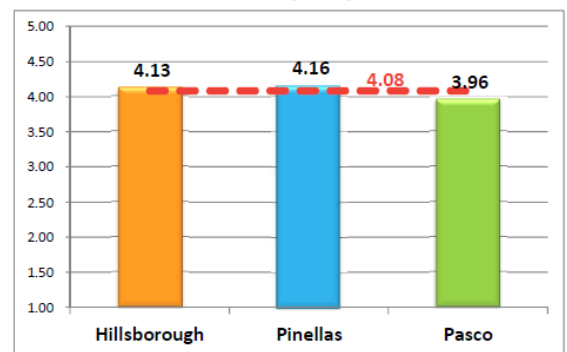


Figure 12. Scenario C Average Rating



Comment from Hillsborough Resident

(works in Hillsborough County)

“Multimodal! This is our future. The only thing I would add is an expanded and modernized streetcar system connecting the urban districts within Tampa. I love the inclusion of the water ferry system as well - we are surrounded by water and need to use it!”

Comment from Pinellas Resident

(works in Hillsborough County)

“This region needs to invest in transit. I live in Pinellas County and there are very few roadway corridors that can be expanded to accommodate the future levels of traffic. The region also needs to invest in walking and biking.”

Comment from Pasco Resident

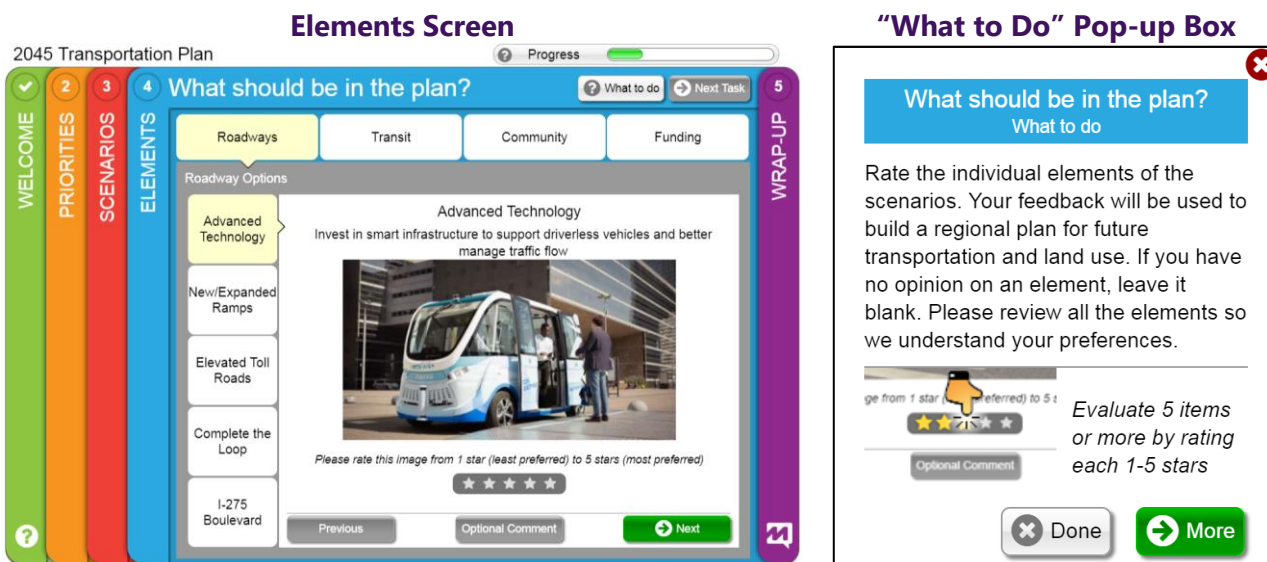
(works in Pasco County)

“I think this (Scenario C) is great because it gives other options to driving everywhere, which can open up job markets that were previously out of reach based on commute.”



Chapter 6 – Elements

The fourth screen polled respondents about Elements, or components of the three scenarios to facilitate further discussion regarding potential roadway projects, transit projects, community development, and funding options. The Elements screen started with the question, **“What Should Be in the Plan?”** The intent of the question was to drill down into the ingredients that make up each of the scenarios to help determine what elements should ultimately be included in a hybrid transportation and growth scenario. In total, there were 20 elements – allowing respondents who liked certain aspects of a scenario, but not the entire scenario, to provide more detailed input that could be used to identify key themes.



It's TIME Tampa Bay Elements

Roadways

- Advanced Technology
- New/Expanded Ramps
- Elevated Toll Roads
- Complete the Loop
- I-275 Boulevard

Community

- Expanded Growth Area
- Preserve Neighborhoods
- More/Better Downtowns
- Efficient Use of Land
- Walk & Bike Focus

Transit

- Expanded Ridesharing
- Express Bus Rapid Transit
- Rail (Local/Regional)
- Water Ferry
- Statewide Rail

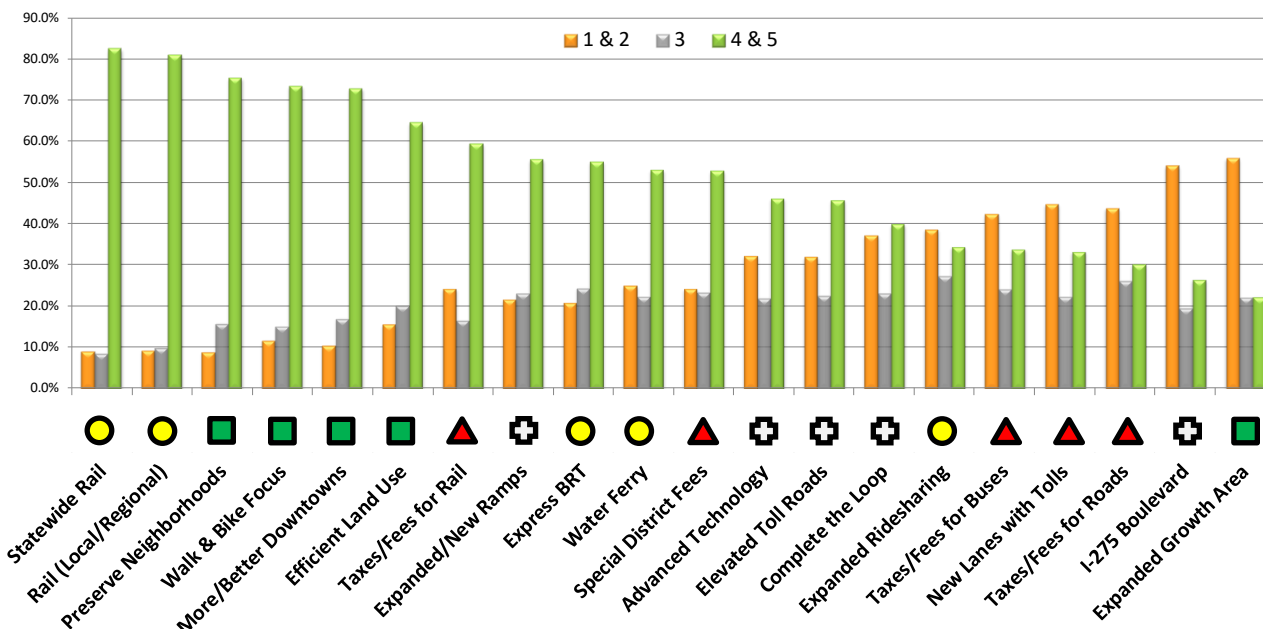
Funding

- New Lanes with Tolls
- Taxes/Fees for Roads
- Taxes/Fees for Buses
- Taxes/Fees for Rail
- Special District Fees

Overall Responses

Figure 13 shows all the elements as sorted by average rating (highly supported elements begin on the left side of the graph, and less favored elements on the far right side). The figure includes color-coded symbols to distinguish which of the four elements each response is assigned to (see legend below the graph).

Figure 13. All Elements Ratings



LEGEND

- ⊕ Roadway Element
- Transit Element
- Community Element
- ▲ Funding Element

The highest overall support was for rail-related projects—both statewide rail connecting to the Tampa Bay area and for local/regional service, such as Light Rail Transit (LRT). The next four highest rated elements focus on community development and growth. Each of these four elements generally focused on more efficient land use—and expanded walking and biking—that would support an expanded regional transit system. By comparison, the fifth community element was an expanded growth area that received the lowest rating of all 20 elements.

Taxes/fees to fund rail rated the highest among the funding elements, with special district fees being the second highest rated funding element. The remaining funding options were less favorable, with over 40% of survey respondents providing low (1 and 2 star) ratings. Of all five funding elements, taxes/fees for roadways was rated the least favorable.

The majority of roadway elements had support and high (4 and 5 star) ratings. The Complete the Loop element had almost a nearly equal level of low and high support, while the I-275 Boulevard Conversion was rated low, with over 50% of survey respondents rating it 1 or 2 stars. Each element is discussed further in the following sections.

Roadway Elements

Overall, survey participants support New/Expanded Ramps, have a generally positive opinion for Advanced Technology and Elevated Toll Roads, a somewhat neutral opinion on Complete the Loop, and less than positive opinion on the conversion of I-275 to a boulevard. Of the five roadway elements, 55% rated Expanded/New Ramps highly (4 or 5 stars) while 54% rated the I-275 boulevard conversion poorly (1 or 2 stars). Figure 14 summarizes the roadway element ratings.

Figure 14. Roadway Elements (Ratings 1 to 5 Stars)

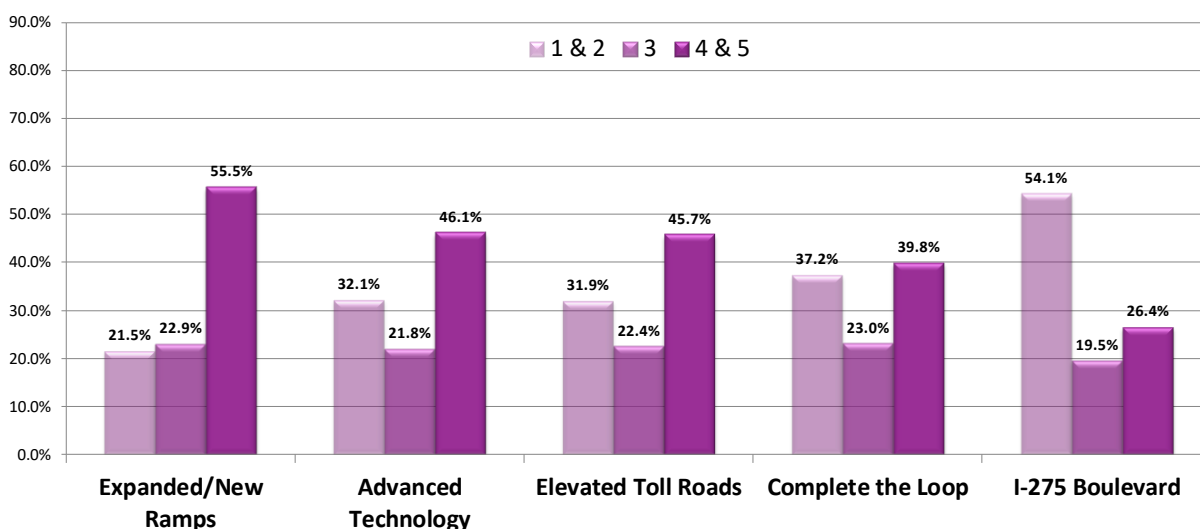







Table 3 shows expanded/new ramps received the highest roadway element average rating at 3.56. Pasco County respondents rate this slightly higher at 3.79 (0.23 points higher) compared to all participants. Overall, Pasco respondents rated roadway improvements 0.20 to 0.30 points higher compared to the overall average, while having a less favorable opinion of advanced technology and I-275 conversion. Pinellas County respondents had a less favorable rating of the Complete the Loop at 2.79 (0.24 points lower than the overall average 3.03). Pinellas respondents also rated the I-275 conversion 0.14 points lower than the average. Figures 15 to 17 display 1 to 5 ratings by county.

Table 3. Roadway Elements (Average Ratings)

	Expanded/New Ramps 	Advanced Technology 	Elevated Toll Roads 	Complete the Loop 	Convert I-275 to a Boulevard 
All Participants:	3.56	3.23	3.20	3.03	2.49
Hillsborough:	---	+ 0.06	- 0.02	+ 0.02	+ 0.07
Pinellas:	3.49 - 0.07	3.27 + 0.04	3.15 - 0.05	2.79 - 0.24	2.35 - 0.14
Pasco:	3.79 + 0.23	3.09 - 0.14	3.41 + 0.21	3.36 + 0.33	2.27 - 0.22

NOTES: 1) Average rating is calculated by summing the 1 to 5 star rating for each element and dividing by number of participants for each category.
2) **Green** or **red** text indicates a difference of 0.08 or greater as compared to all survey participants.

Figure 15. Roadway Elements – Hillsborough County Respondents

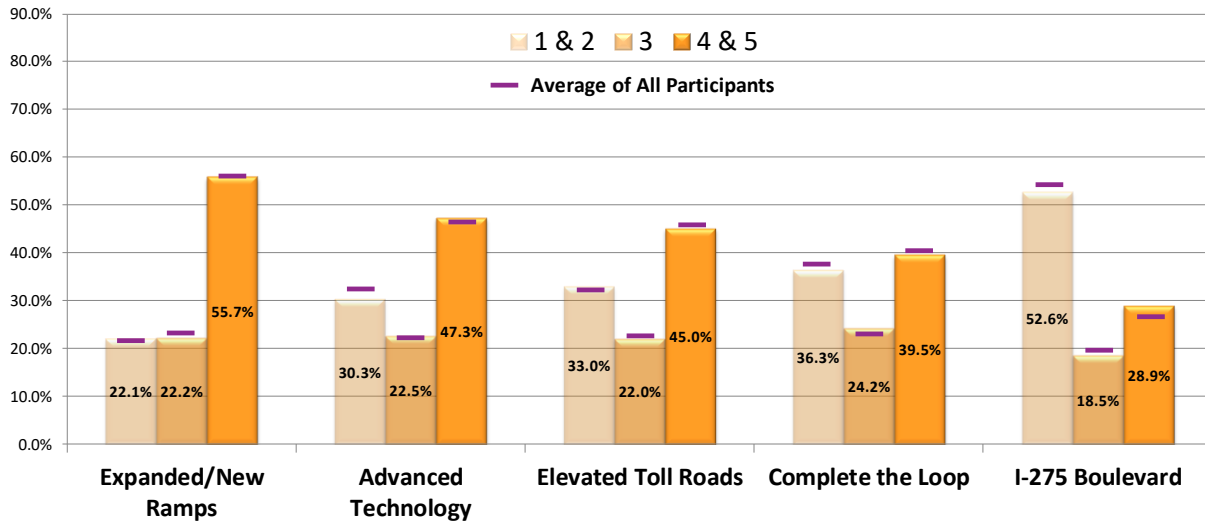


Figure 16. Roadway Elements – Pinellas County Respondents

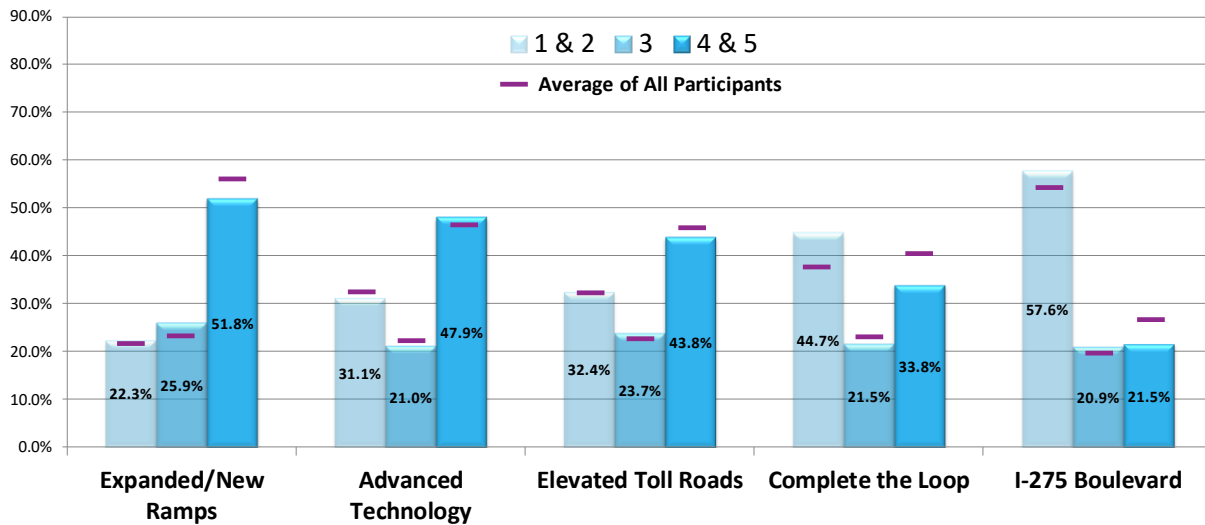
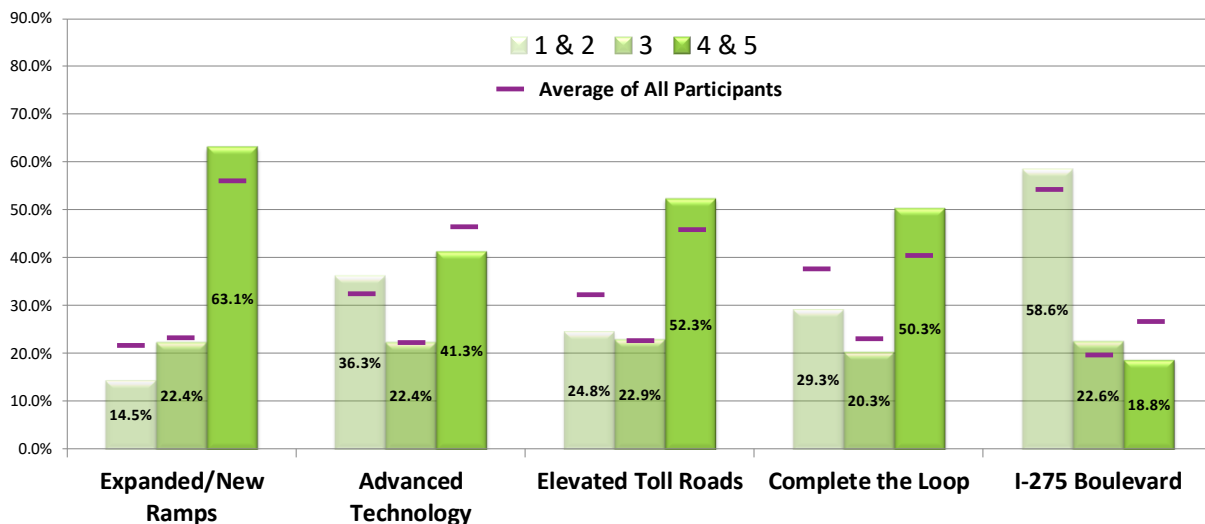


Figure 17. Roadway Elements – Pasco County Respondents



Individual Roadway Elements

New / Expanded Ramps

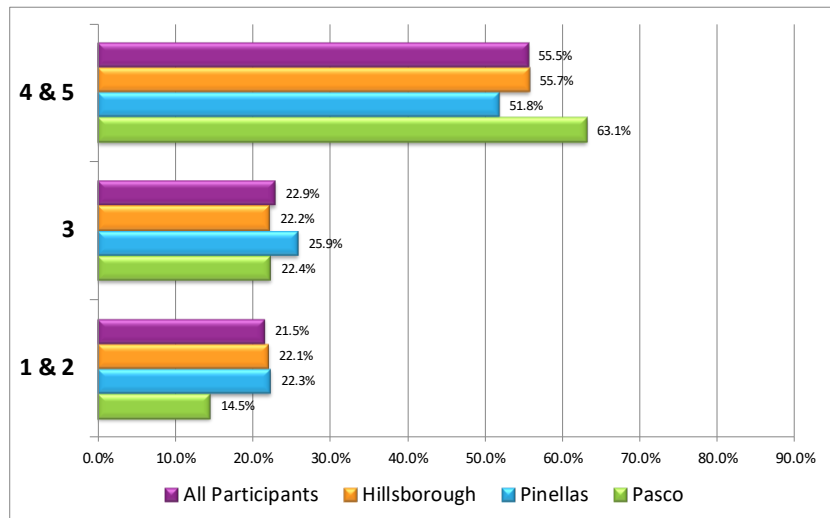
This element includes targeted roadway investment to improve connections and traffic flow between Interstates/regional expressways and the local roadway network. Generally speaking, these improvements are intended to enhance traffic operations and more effectively move traffic to reduce congestion, reduce travel delay and improve travel safety. Figure 18 displays the 1 to 5 star rating this element received among participants from different counties.



New/Expanded Ramps

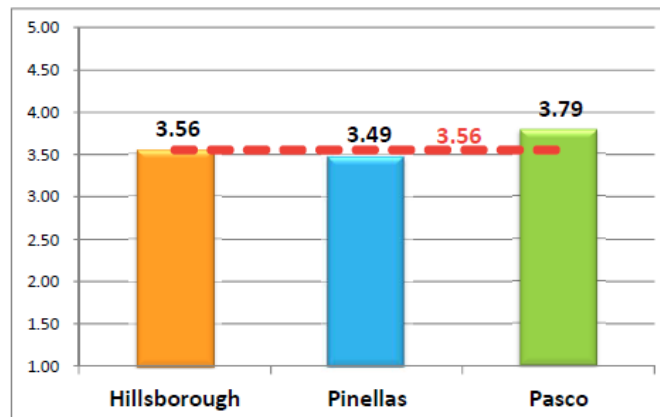
Improve expressway ramps and new road connections to make it easier and safer to enter and exit.

Figure 18. New/Expanded Ramps (Ratings)



The majority of all survey participants favor this type of improvement. In total, among the 6,968 participants who rated this element, approximately 55% rated it highly (four or five stars). Pasco County residents tend to have a more favorable rating of this scenario, coming in approximately 8 percentage points higher compared to all survey participants (63% high rating). By comparison, Pinellas County residents have a slightly less favorable opinion of this element at approximately 3% points lower than the survey average (52% high rating). Figure 19 shows the average rating for this element was 3.56, with Pasco County participants having a higher rating at 3.79.

Figure 19. New/Expanded Ramps (Average Rating)



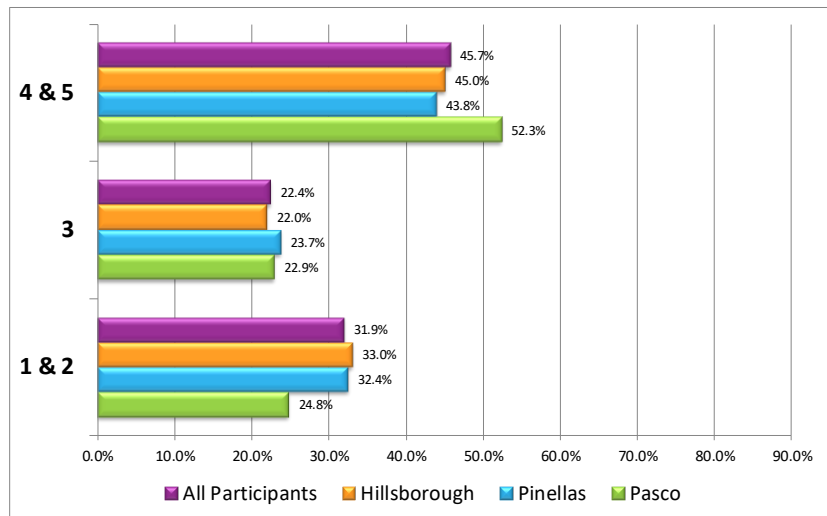
Elevated Toll Roads

Elevated toll roads would provide greater capacity on area expressways by limiting the number of entry/exit points, helping reduce travel delay and enhance regional travel connections. The elevated toll roads have a secondary benefit as the raised structure has the potential to avoid flooding during hurricanes or other storm events. Figure 20 displays the 1 to 5 star rating for this element among participants from different counties.



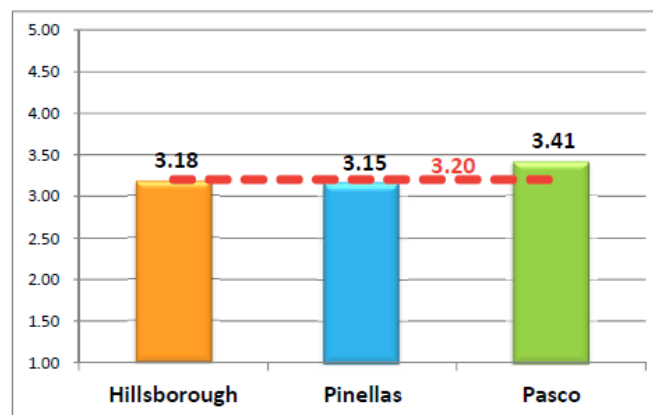
Elevated Toll Roads
Expressways with limited entry points provide reliable travel times and less delay

Figure 20. Elevated Toll Roads (Ratings)



The majority of all survey participants slightly favored this type of improvement. Among the 6,880 participants who rated this element, approximately 46% gave it a rating of four or five stars. Pasco County residents have a more favorable rating of elevated toll roads—approximately 8-9 percentage points higher compared to all survey participants (52% four or five star rating). By comparison, Pinellas County residents have a slightly less favorable opinion of this element reporting in at approximately 3 percentage points lower than the survey average (44% four or five star rating). Figure 21 shows the average rating was 3.20, with Pasco County respondents coming in at 3.41.

Figure 21. Elevated Toll Roads (Average Rating)



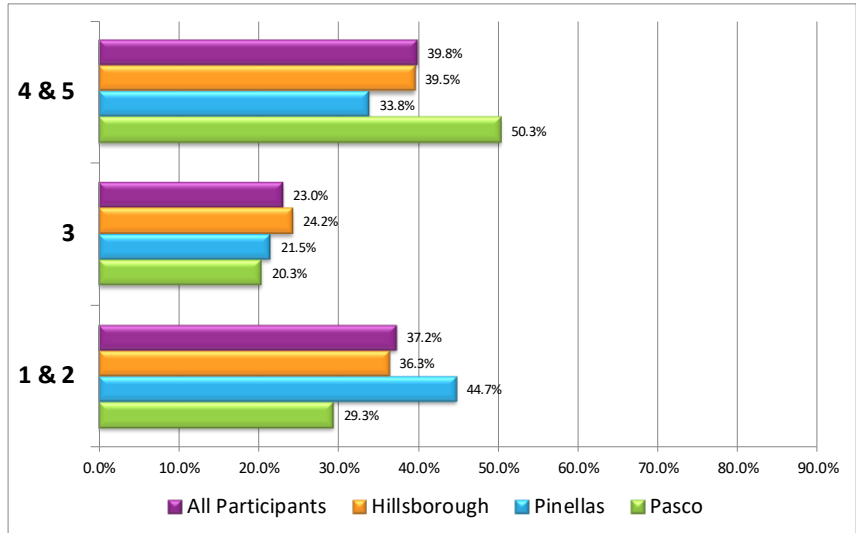
Complete the Beltway Loop

The Complete the Beltway Loop concept would construct a new toll road in Pasco County that would connect I-75 to Pinellas County through Pasco County via the SR 54 and McMullen-Booth Road corridors. This new facility, combined with improvements along I-275 and I-75 would create an outer roadway, or beltway, facility that would move traffic more efficiently away from the Tampa’s urban core area. Figure 22 displays the 1 to 5 star rating for this element among participants from different counties.



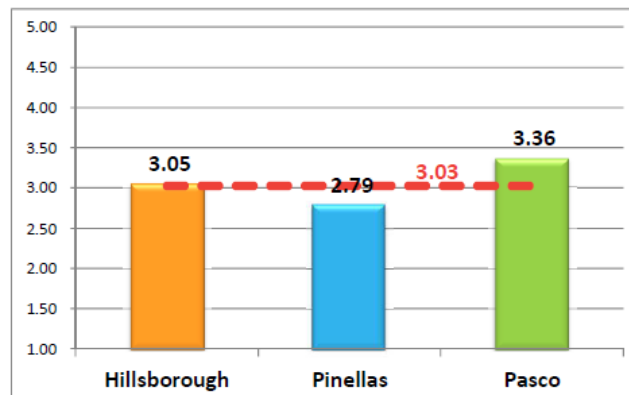
Complete the Loop
 New toll road in Pasco connecting I-75 to McMullen-Booth Road in Pinellas provides another travel route around the region.

Figure 22. Complete the Loop (Ratings)



The survey participants responded neutrally to this improvement. In total, 6,783 participants rated this element, with approximately 40% rating it high (4 and 5 stars) and 37% rating it low (1 and 2 stars). Pasco County residents tend to have a more favorable rating of this scenario, with 50% rating it 4 and 5 stars. By comparison, Pinellas County residents have a less favorable opinion of this concept, with just 34% rating it 4 and 5 stars and 45% rating it low at 1 and 2 stars. Figure 23 shows the average rating for this element was 3.03, with Pasco County respondents coming in higher at 3.36 and Pinellas County respondents coming lower at 2.79.

Figure 23. Complete the Loop (Average Rating)



Advanced Technology

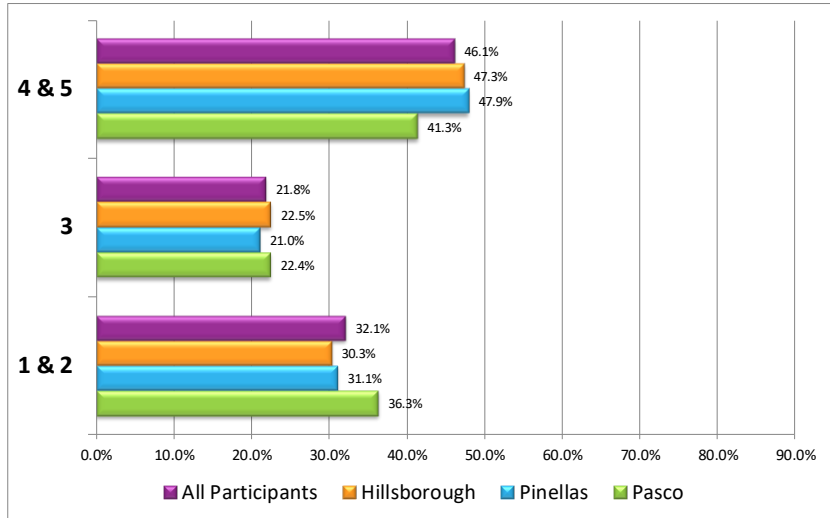
Ever changing technology advancements are quickly turning what used to be visionary transportation concepts into viable future mobility solutions. Autonomous vehicles (AV) and connected networks (CN) show promising signs of being able to address increasing traffic gridlock brought on by urban growth. Vehicle automation also extends into shared mobility services and freight transportation, making the potential benefits of a driverless future staggering. Figure 24 displays the 1 to 5 star rating for this element among respondents from different counties.



Advanced Technology

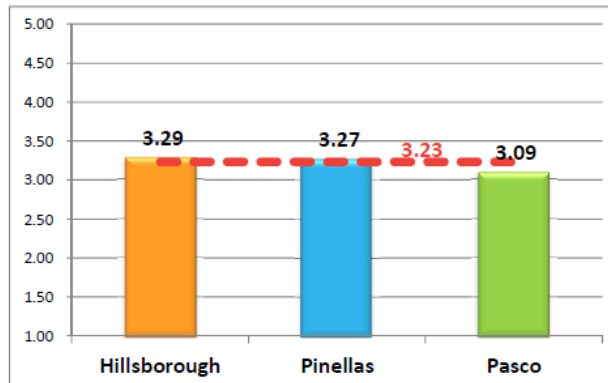
Invest in smart infrastructure to support driverless vehicles and better manage traffic flow.

Figure 24. Advanced Technology (Ratings)



Generally speaking, survey participants favor investment in advanced technology to better manage traffic flow. In total, 46% of the total 7,793 participants rated this element highly (4 or 5 stars). Pasco County residents have a slightly less favorable opinion of advanced technology at 5 percentage points lower than the survey average. Figure 25 shows the overall average rating for all survey respondents was 3.23, with Pasco County respondents coming in slightly lower at a 3.09 average.

Figure 25. Advanced Technology (Average Rating)



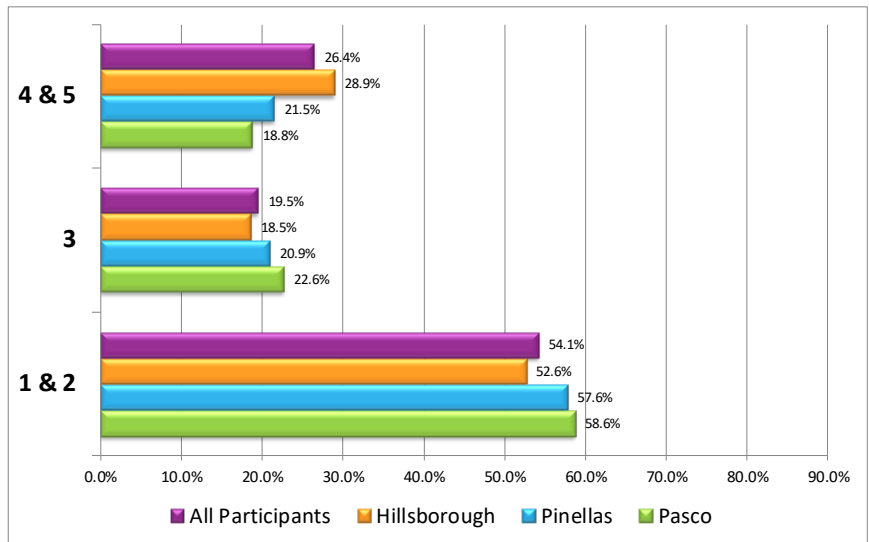
I-275 Boulevard Conversion

The I-275 boulevard conversion is a conceptual improvement that would convert an approximately ten-mile segment of I-275 north of downtown Tampa from an interstate facility to an at-grade boulevard. This improvement would be implemented to help reconnect neighborhoods and promote the use of alternative transportation modes. This conceptual project would be coordinated with improvements to the existing interstate and regional roadway network located on the outer fringe to facilitate the movement of people and goods around the area. Figure 26 summarizes survey respondents’ reaction to an I-275 boulevard conversion.



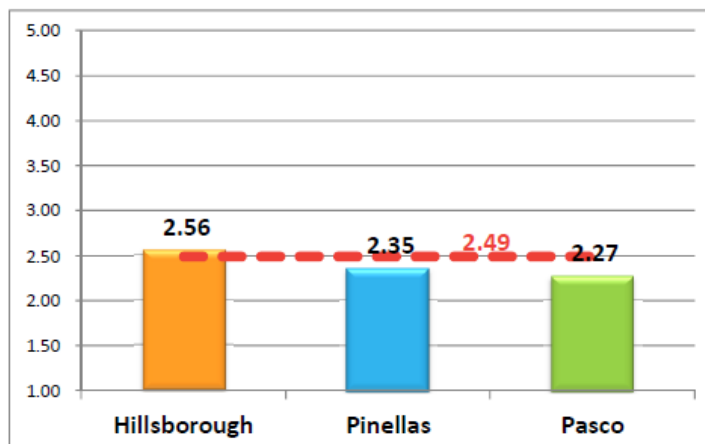
I-275 Boulevard
Convert I-275 north of downtown Tampa to a street-level boulevard to reconnect Tampa’s core neighborhoods.

Figure 26. I-275 Boulevard Conversion (Ratings)



Overall, survey participants rated this the second lowest of all elements. In total, 6,657 participants rated this element, with approximately 54% rating it low (one or two stars), compared to 26% that rated it high (four or five stars). Pinellas and Pasco County residents tended to give this concept a slightly lower rating at 57% to 59%. Figure 27 displays the average rating for the I-275 conversion was 2.49. Hillsborough County respondents were slightly higher at a rating of 2.56.

Figure 27. I-275 Boulevard Conversion (Average Rating)



Transit Elements

Overall, there was widespread support for expanding transit options, which is consistent with the Alternative to Driving receiving a high rating for the Priorities. Survey participants overwhelmingly supported Statewide Rail and Local/Regional Rail Service, generally supported Express BRT Service and Water Ferry and tended to have a less favorable opinion regarding Expanded Ridesharing, where there were more neutral and low ratings than high. Each of the transit elements is discussed in more detail in the following section. Figure 28 summarizes the transit element ratings.

Figure 28. Transit Elements (Ratings 1 to 5 Stars)

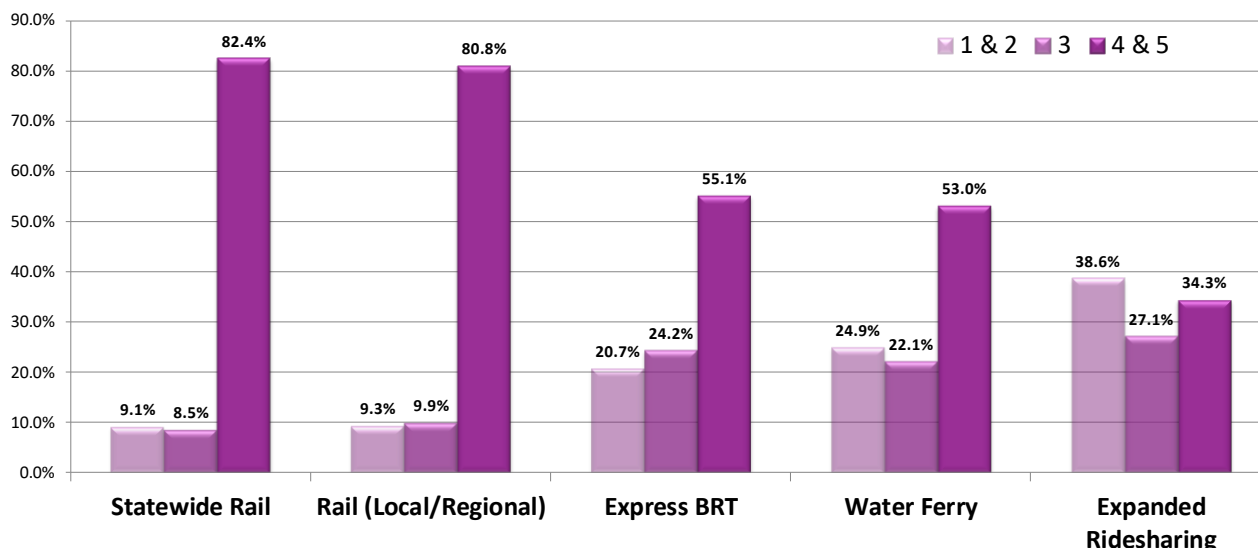







Table 4 summarizes the transit element average ratings, which show relatively little variation between counties. The two exceptions are Expanded Ridesharing and Water Ferry where Pasco County respondents were 0.13 to 0.18 points less likely to support these modes. Statewide Rail received the highest average rating (4.35) within the transit category, followed closely by Local/Regional Rail (4.28). Of the five transit elements, the Expanded Ridesharing was the only element to receive an average rating below three (2.93 rating). Figures 29 to 31 display the responses by county.

Table 4. Transit Elements (Average Ratings)

	Statewide Rail 	Rail (Local/Regional) 	Express BRT 	Water Ferry 	Expanded Ridesharing 
All Participants:	4.35	4.28	3.54	3.49	2.93
Hillsborough:	4.37	4.33	3.50	3.51	2.94
	+ 0.02	+ 0.05	- 0.04	+ 0.02	+ 0.01
Pinellas:	4.41	4.32	3.56	3.56	2.97
	+ 0.06	+ 0.04	+ 0.02	+ 0.07	+ 0.04
Pasco:	4.40	4.26	3.59	3.36	2.75
	+ 0.05	- 0.02	+ 0.05	- 0.13	- 0.18

NOTES: 1) Average rating is calculated by summing the 1 to 5 star rating for each element and dividing by number of participants for each category.
2) Green or red text indicates a difference of 0.08 or greater as compared to all survey participants.

Figure 29. Transit Elements – Hillsborough County Respondents

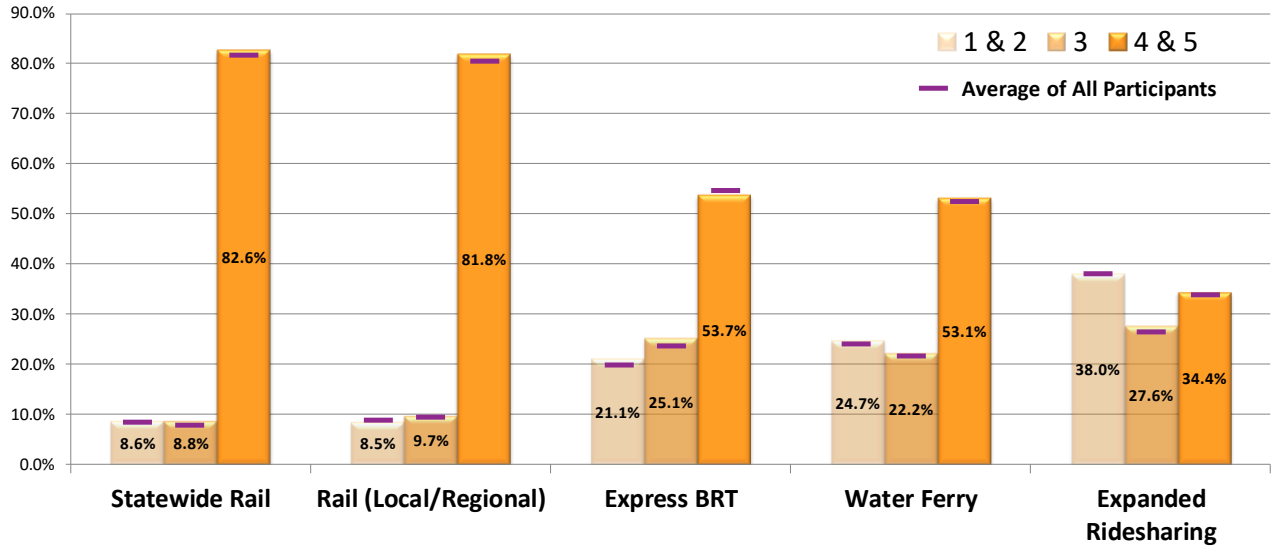


Figure 30. Transit Elements – Pinellas County Respondents

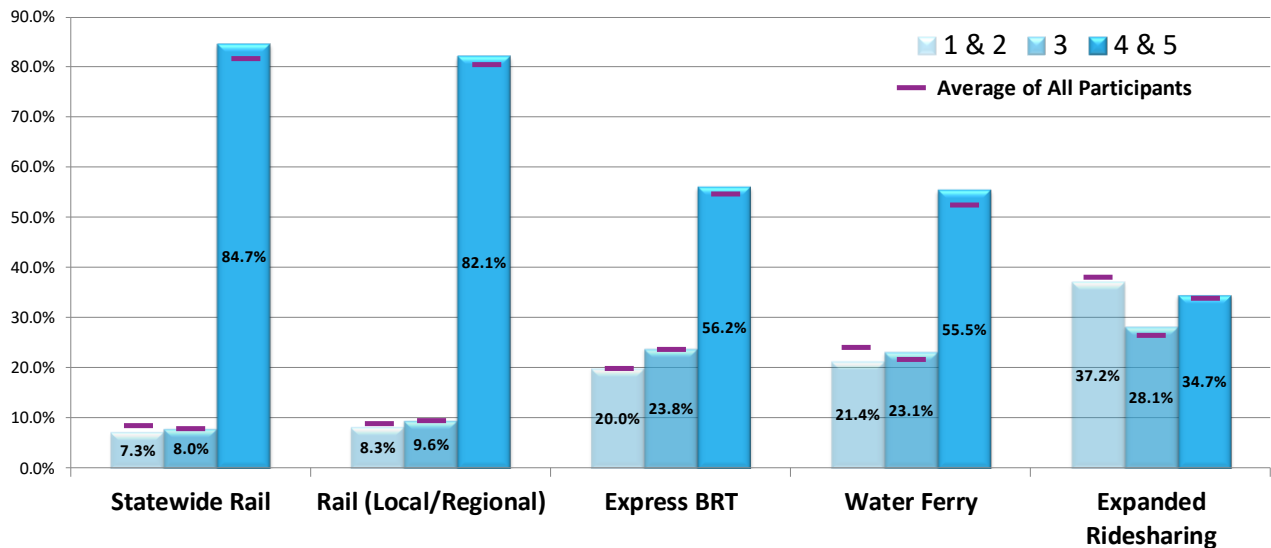
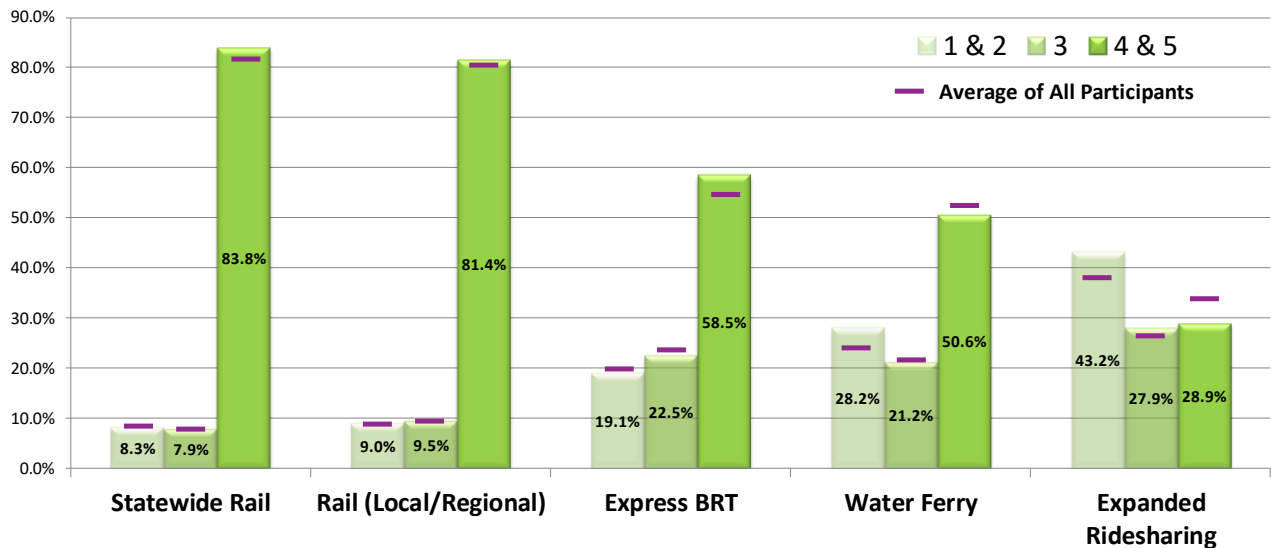


Figure 31. Transit Elements – Pasco County Respondents



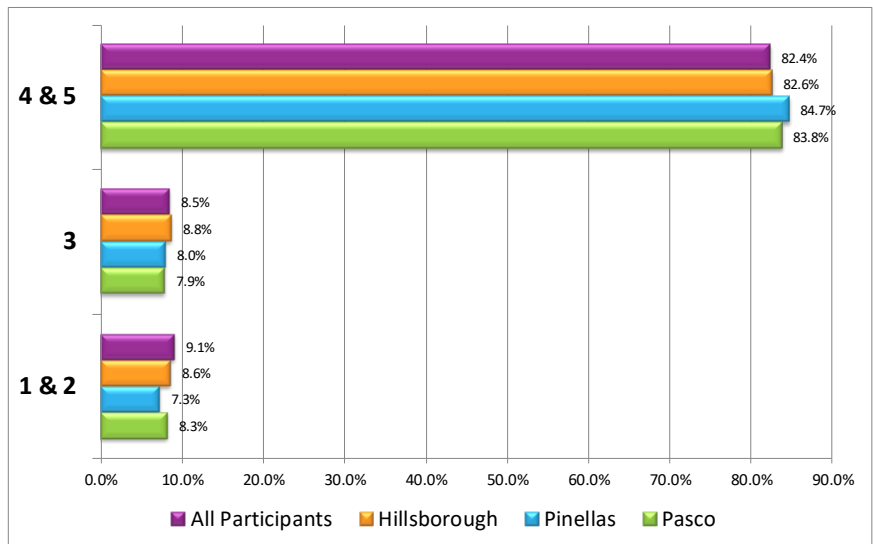
Statewide Rail

A statewide rail system would provide a commuter passenger rail service connecting the Tampa Bay region to Orlando and other regions throughout Florida. This concept would provide Tampa Bay residents and out of state visitors an alternative to having to drive the I-4 corridor. Figure 32 summarizes survey respondents’ reaction to a statewide rail connection to Tampa Bay.



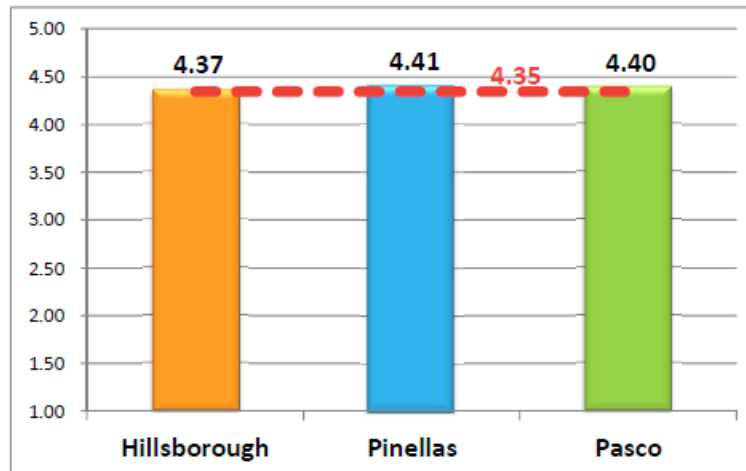
Statewide Rail
Connect the Tampa Bay region to Orlando and other regions around Florida.

Figure 32. Statewide Rail (Ratings)



As noted above, survey participants responded positively to this type of improvement. In total, among the 6,614 participants who rated this element, approximately 82% rated it four or five stars. All three counties had an equal favorability rating (83%-85%). Figure 33 shows the overall average rating for all survey respondents was 4.35. As the overall average falls below the three county averages, this would indicate that survey respondents who did not provide a home zip coded rated this element slightly lower compared to those who provided their home zip code.

Figure 33. Statewide Rail (Average Ratings by County)



Rail Service

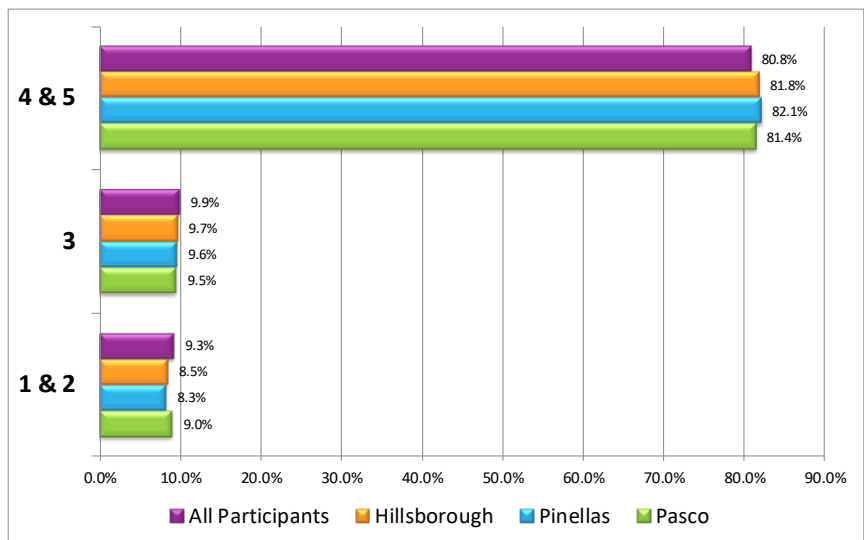
This concept would utilize mostly existing rail lines, along with some new rail connections along major travel corridors, to provide regional/local rail transit service. In scenario C, the rail service would connect the three counties and would continue north to connect to Hernando County. Figure 34 summarizes survey respondents’ reaction to implementing a rail service within the Tampa Bay tri-county area.



Rail Service

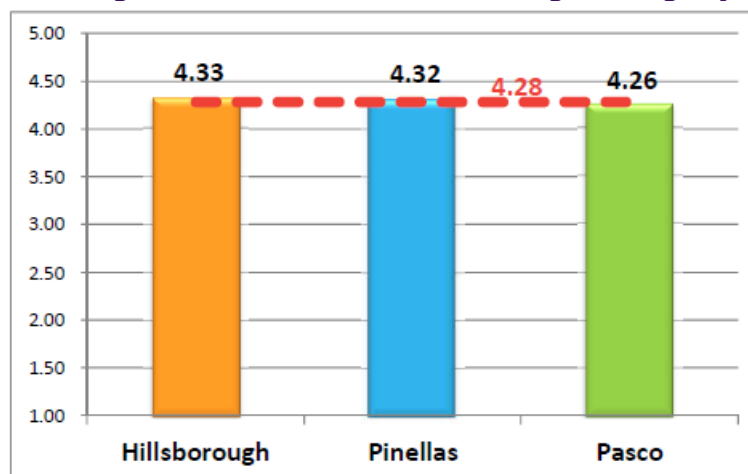
Use mostly existing rail lines, and some new rail connections along major roads, to provide regional rail service.

Figure 34. Regional/Local Rail Service (Ratings)



Nearly 81% of survey participants favor this improvement and rated it high (4 or 5 stars). By comparison, only 9% of all survey participants rated this concept low (1 or 2 stars). In total, 6,666 participants rated this element. All three counties had an equal favorability rating (between 81% and 82%). Figure 35 displays the average rating of 4.28, with Hillsborough and Pinellas Counties only slightly higher.

Figure 35. Regional/Local Rail Service (Average Ratings by County)



Express Bus & BRT Service

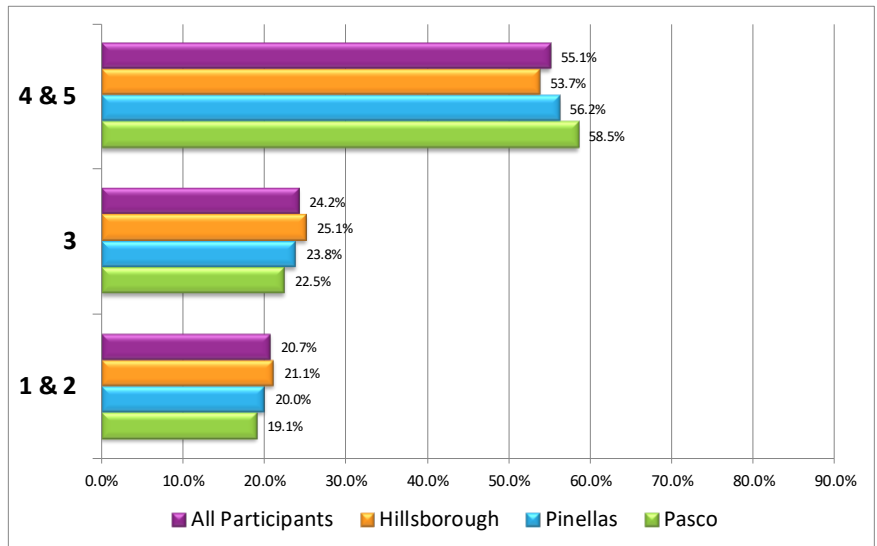
This concept builds off the exaggerated Scenario C which included additional BRT projects throughout the tri-county area, including a BRT route along Central Avenue in Pinellas County. Figure 36 displays survey respondents’ ratings for this element.



Express Bus & BRT Service

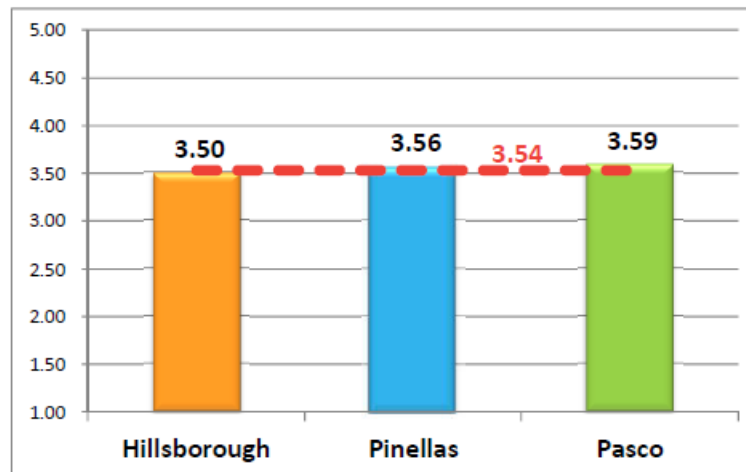
Make express bus service more frequent and run some buses in their own lanes (Bus Rapid Transit).

Figure 36. Express Bus and Bus Rapid Transit (Ratings)



The survey participants responded positively to this improvement. Fifty-five percent of the total 6,626 participants gave this element a rating of four or five stars. All three counties had a nearly equal favorability rating (54% to 59%), with Pasco County slightly more favorable than Hillsborough and Pinellas Counties. Figure 37 shows the average rating was 3.54, which was fairly consistent across all three counties.

Figure 37. Express Bus and Bus Rapid Transit (Average Ratings by County)



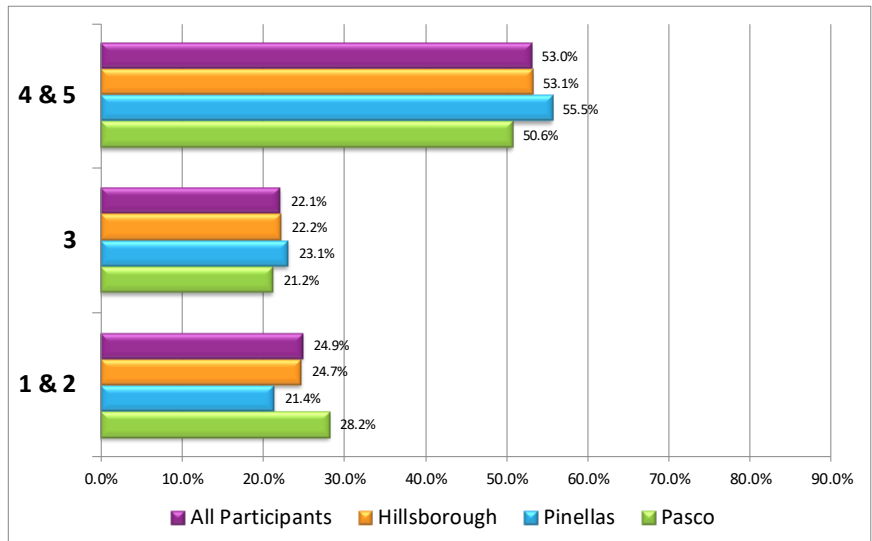
Water Ferry

This concept builds off a 2016/2017 trial run of a downtown St. Petersburg to downtown Tampa water ferry service. This service, which returns in November 2018, would be expanded to connect to MacDill Air Force base and South Hillsborough. Figure 37 shows the participant ratings for this element.



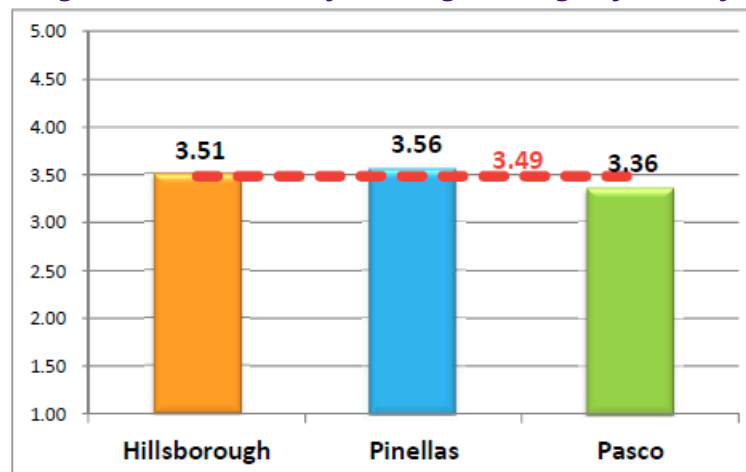
Water Ferry
Connect the downtowns of Tampa and St. Petersburg, and MacDill AFB and South Hillsborough.

Figure 38. Water Ferry (Ratings)



The survey participants responded positively to this type of improvement. In total, 6,575 participants rated this element, with approximately 53% rating it four or five stars. Pinellas County responded most favorably (56%, average score 3.56) and Pasco County responded somewhat less favorably (51%, average score 3.36). Figure 38 shows the average rating was 3.49.

Figure 39. Water Ferry (Average Ratings by County)



Expanded Ridesharing

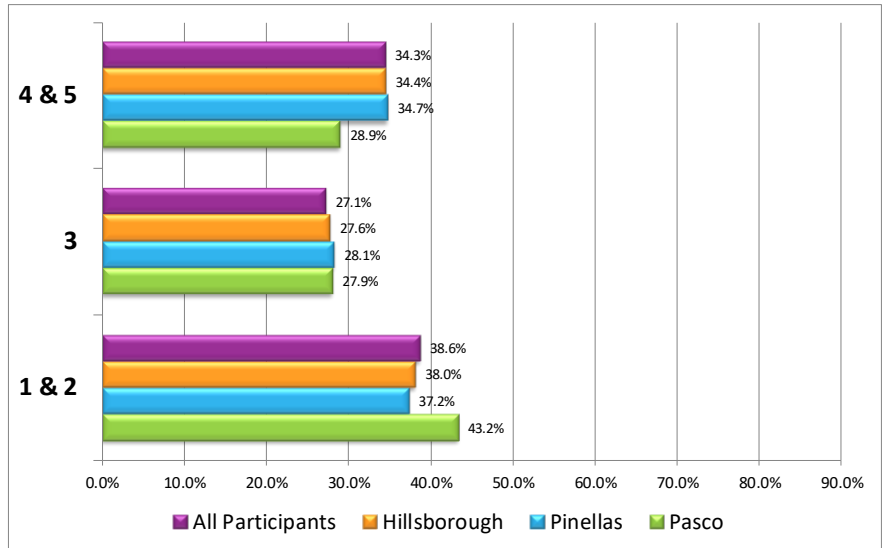
Over the past decade, ridesharing has emerged as important travel mode in urban environments—drawing both praise and criticism. Depending on the context and local policies, it can enable people to avoid single-occupancy vehicle travel for some trips, such as making first- and last-mile connections to transit; however, it can also add to urban congestion and attract riders away from transit. This element focuses on using ridesharing to provide alternatives that would boost access to transit and decrease the need for car ownership. Figure 40 displays the ratings for this element.



Expanded Ridesharing

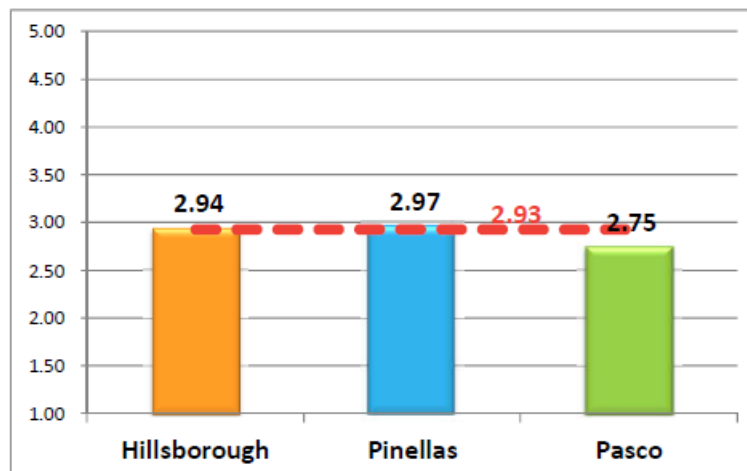
Encourage more rideshare options (e.g. Uber/Lyft) to travel without having to own a car while improving connections to transit.

Figure 40. Expanded Ridesharing (Ratings)



The survey participants responded somewhat negatively to this type of improvement. In total, 7,350 participants rated this element, of whom fewer rated it favorably (34%) than negatively (39%). Pasco County responded most negatively to expanded ridesharing (43%) and Pinellas County responded least negatively to this (37%). Figure 40 shows the average rating was 2.93, with Pasco County reporting a slightly lower average at 2.75.

Figure 41. Expanded Ridesharing (Average Ratings by County)



Community Elements

Overall, survey participants rated most community elements very favorably. Preserving Neighborhoods, Walk & Bike Focus, and More/Better Downtowns all received over 72% high approval (4 or 5 stars). The exception is the Expanded Growth Area, which received only 22% high approval. Figure 42 provides a summary of the community elements.

Figure 42. Community Elements (Ratings 1 to 5 Stars)

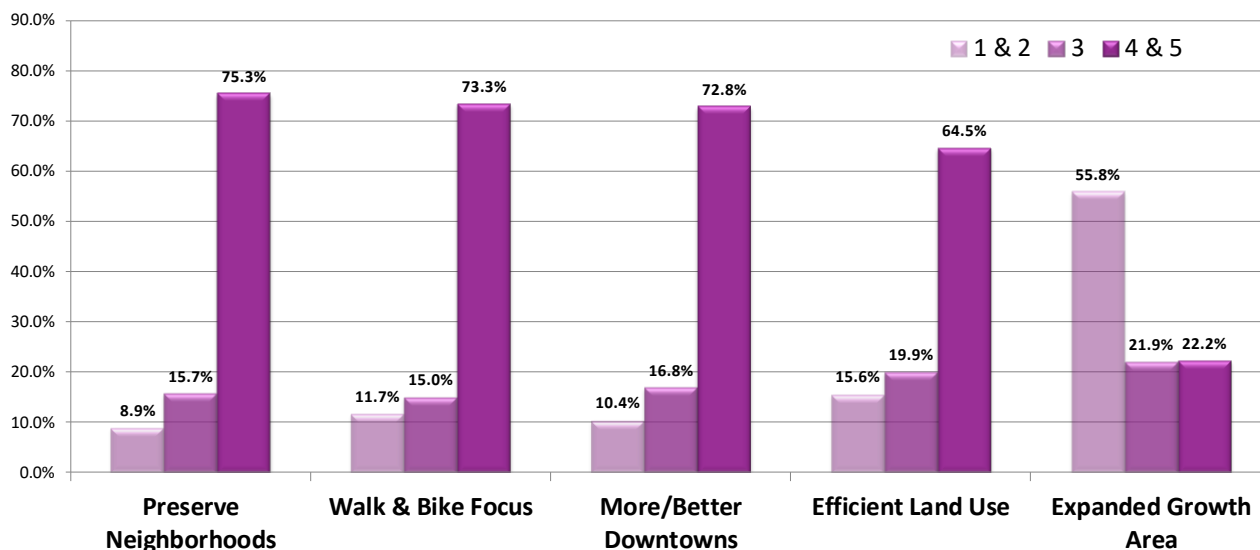


Table 5 provides the average ratings for the five community elements, including the variance of individual counties from the total average. The highest rated were Preserve Neighborhoods, followed closely by Walk & Bike Focus and More/Better Downtowns—all around 4.10. The Expanded Growth Area was the only element to receive an average rating below 3 (2.40 rating), even in the county where it garnered the most support, Pasco County (2.71). Each of the community elements is discussed in more detail in the following section. Figures 43 to 45 display the responses by county.

Table 5. Community Elements (Average Ratings)

	Preserve Neighborhoods	Walk & Bike Focus	More/Better Downtowns	Efficient Land Use	Expanded Growth Area
All Participants:	4.13	4.11	4.07	3.82	2.40
Hillsborough:	4.13	4.13	4.11	3.89	2.39
	-----	+ 0.02	+ 0.04	+ 0.07	- 0.01
Pinellas:	4.22	4.20	4.08	3.72	2.26
	+ 0.09	+ 0.09	+ 0.01	- 0.10	- 0.14
Pasco:	4.08	3.93	3.97	3.76	2.71
	- 0.05	- 0.18	- 0.10	- 0.06	+ 0.31

NOTES: 1) Average rating is calculated by summing the 1 to 5 star rating for each element and dividing by number of participants for each category.
 2) Green or red text indicates a difference of 0.08 or greater as compared to all survey participants.

Figure 43. Community Elements – Hillsborough County Respondents

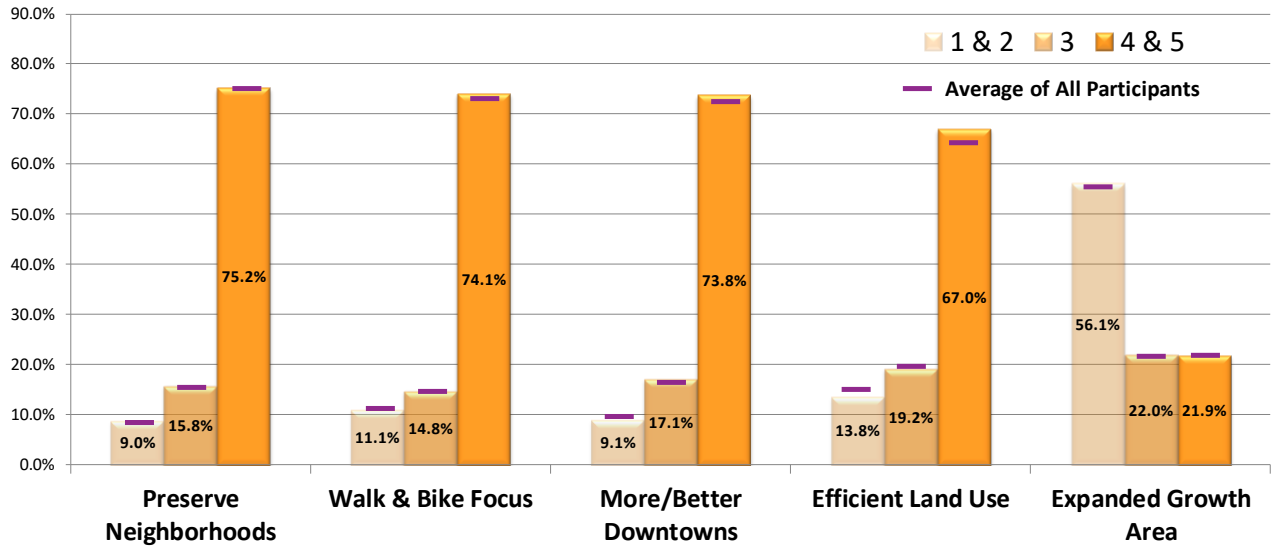


Figure 44. Community Elements – Pinellas County Respondents

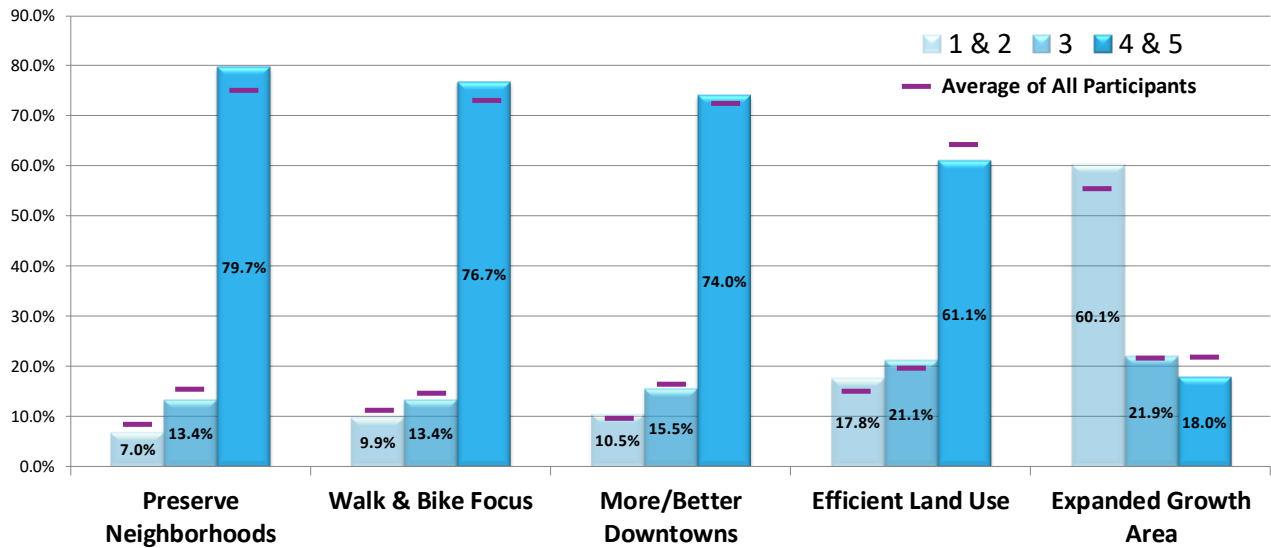
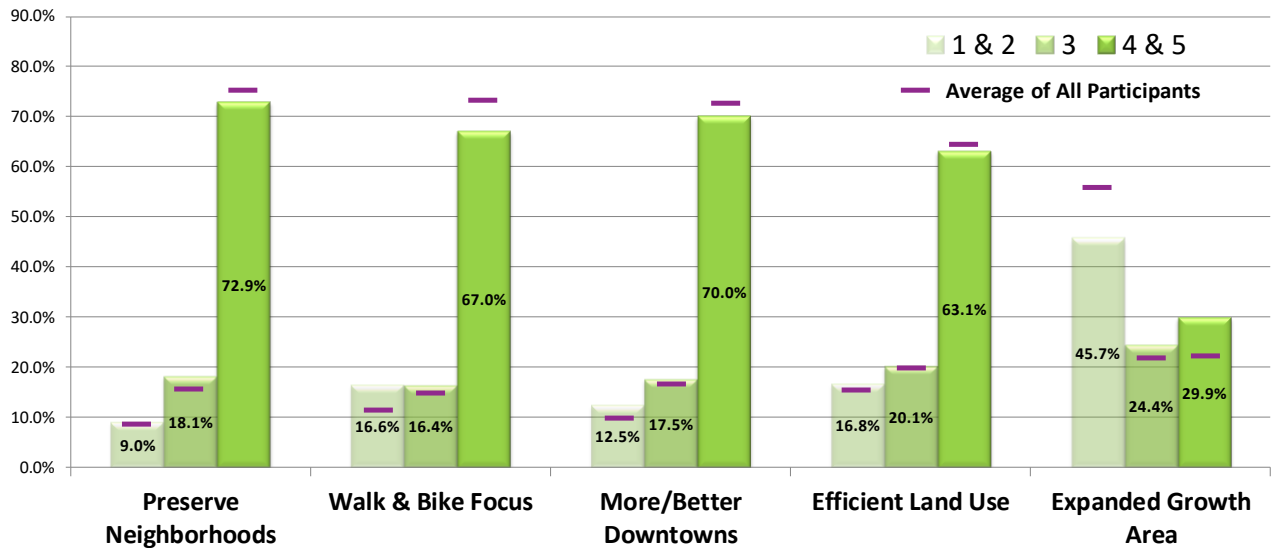


Figure 45. Community Elements – Pasco County Respondents



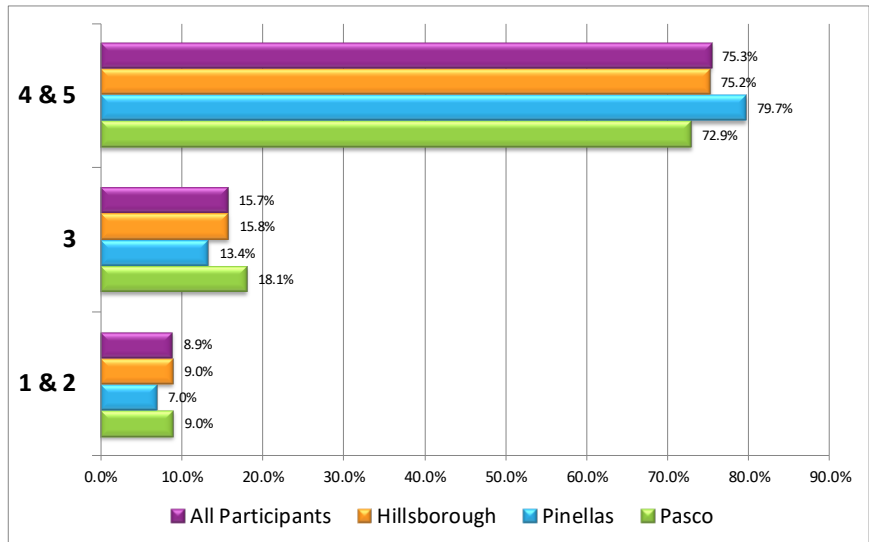
Preserve Neighborhoods

As our communities grow older and more established, time can take its toll on the buildings, landscape, and infrastructure that make them unique and full of character. This element would dedicate investment to ensuring that neighborhoods that are older and may be in decline receive targeted attention to improve conditions, hopefully serving as a catalyst to encourage further reinvestment by residents and businesses. Figure 46 displays the ratings for this element, overall and by county.



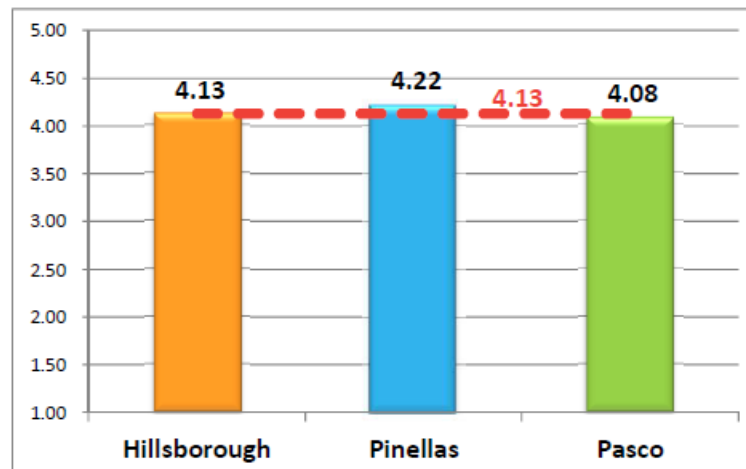
Preserve Neighborhoods
Revitalize older neighborhoods in cities and suburbs, and promote reinvestment.

Figure 46. Preserve Neighborhoods (Ratings)



The survey participants responded positively to this type of improvement. In total, 6,571 participants rated this element, and approximately 75% rated it four or five stars. Pasco County responded slightly less positively (73% rating 4 or 5 stars), as might be expected given the County is experiencing primarily new development, and Pinellas County responded most favorably (80% rating 4 or 5 stars). Figure 47 shows the average rating was 4.13, with relatively little difference by county.

Figure 47. Preserve Neighborhoods (Average Ratings by County)



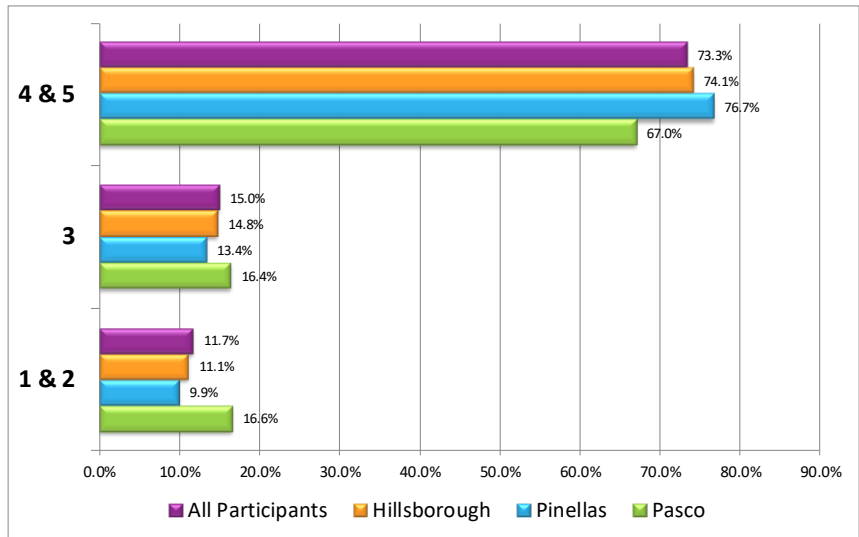
Walk & Bike Focus

This element would focus resources on pedestrian and cycling infrastructure to both destination-oriented and recreational trips. Improved connectivity of pedestrian infrastructure (like sidewalks) and bike network can improve first- and last-mile connections to transit and enable more non-motorized trips to work, schools, and shops. In the area of recreational travel, protected or off-street paths provide greater comfort and a more safe and pleasant environment for people of all abilities. Figure 48 shows the ratings for the element across all participants and by county.



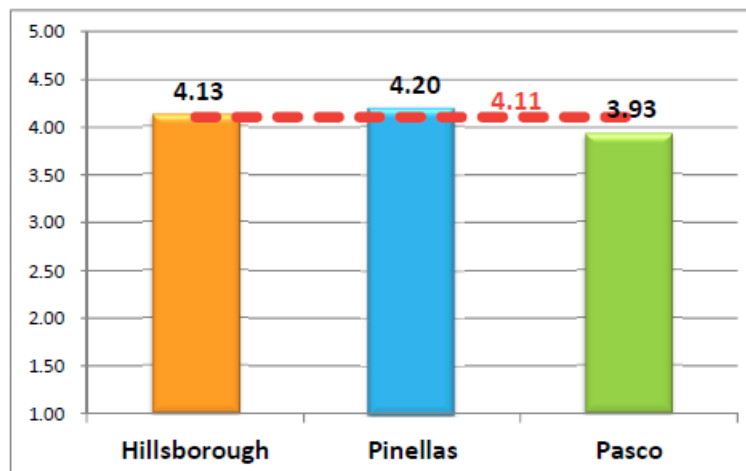
Walk & Bike
Sidewalks and bike lanes provide more connections to transit and neighborhoods.

Figure 48. Walk & Bike Focus (Ratings)



The survey participants responded positively to this type of improvement. In total, 6,491 participants rated this element, with approximately 73% giving it four or five stars. Pasco County responded slightly less positively (67% rating 4 or 5 stars) and Pinellas County responded most favorably (77% rating 4 or 5 stars), consistent with a higher priority focus on identifying alternatives to driving. Figure 49 shows the average rating was 4.11, with Pinellas reporting in at 4.20.

Figure 49. Walk & Bike Focus (Average Ratings by County)



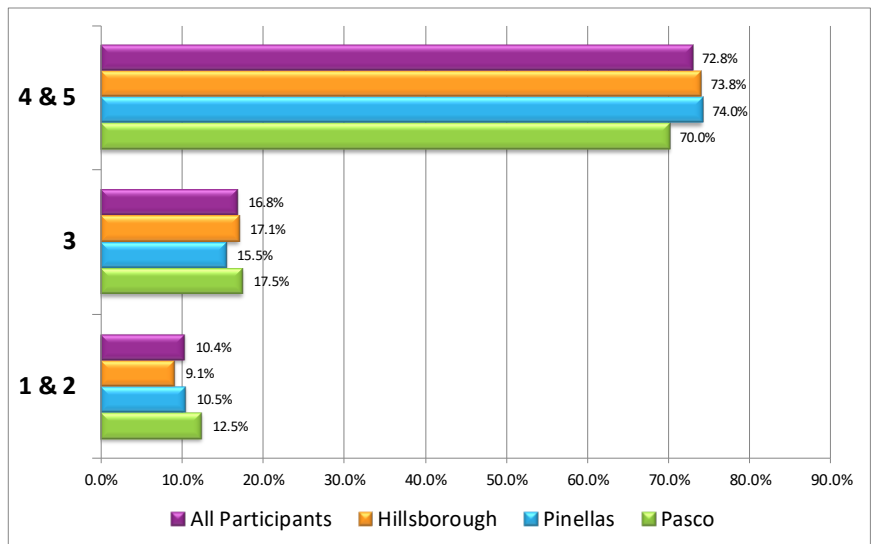
More/Better Downtowns

This element emphasizes the importance of creating more or better downtowns by directing resources and tailoring land use policies to encourage such commercial districts. These downtowns would typically have a mix of shops, offices, and housing options located in mid- and high-rise buildings near transit stations to revitalize the area with larger day-time and night-time populations. Figure 50 shows the ratings for this element.



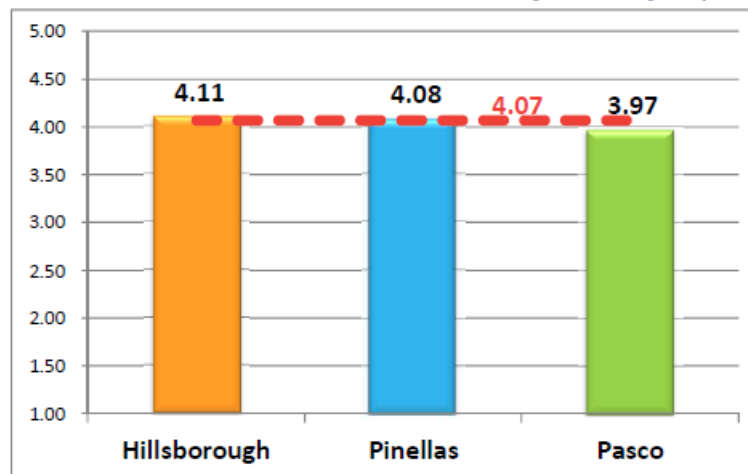
More/Better Downtowns
Revitalize commercial districts with a mix of mid-rise and high-rise office and housing options near transit stations.

Figure 50. More/Better Downtowns (Ratings)



The survey participants responded positively to this type of improvement. In total, 6,499 participants rated this element, with 73% giving it four or five stars. Pasco County responded slightly less positively (70% rating 4 or 5 stars) and Pinellas County responded most favorably (74% rating 4 or 5 stars). Figure 51 shows the average rating was 4.07, with relatively little difference between counties

Figure 51. More/Better Downtowns (Average Ratings by County)



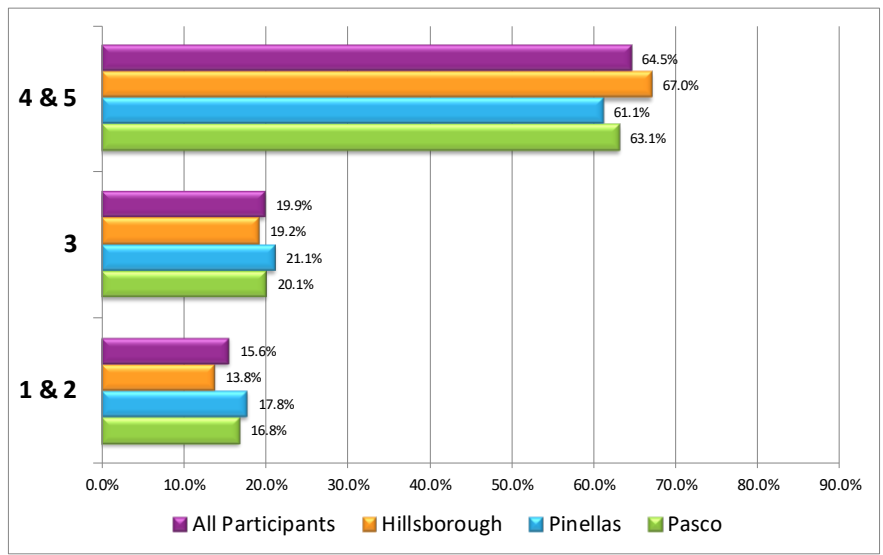
Efficient Use of Land

Efficient use of land is an element that would enable or encourage higher density of new construction in areas where it is currently prohibited or poorly incentivized. By doing so, expansion into currently undeveloped areas will slow and there will be less need to support long auto commutes or to distribute public services to developments far from existing communities. Figure 52 shows the ratings that this element received in the survey.



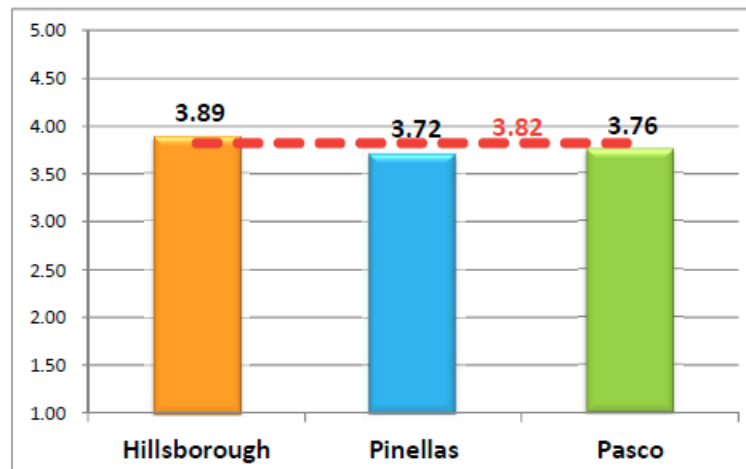
Efficient Use of Land
New construction is higher density – such as, more Main Streets and townhomes – allowing more gradual planned expansion into rural lands.

Figure 52. Efficient Use of Land (Ratings)



The survey participants responded positively to this type of improvement. In total, 6,456 participants rated this element, with 65% giving it four or five stars. Pinellas County responded slightly less positively (61% rating 4 or 5 stars) and Hillsborough County responded most favorably to this (67% rating 4 or 5 stars). Figure 53 shows the average rating was 3.82, with little difference observed between Counties.

Figure 53. Efficient Use of Land (Average Ratings by County)



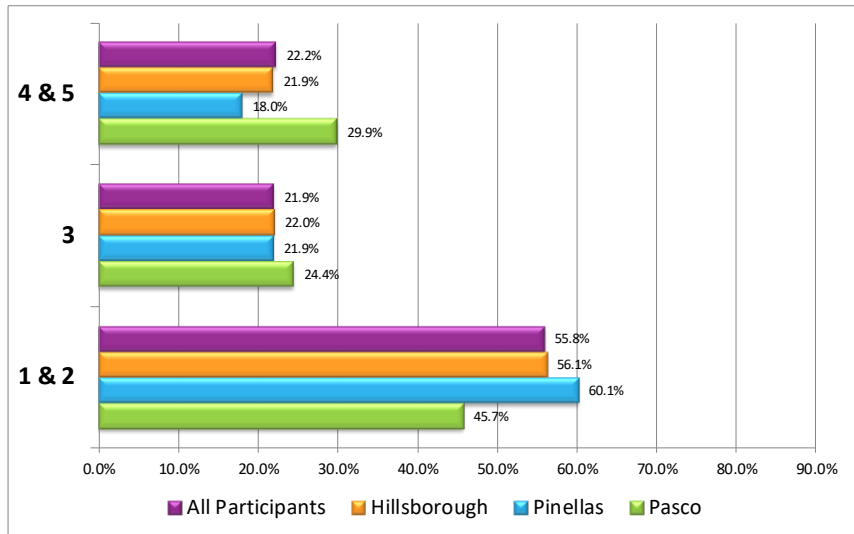
Expanded Growth Area

In contrast to the previous element, Expanded Growth Area would support continued outward expansion, with new development occurring in currently rural areas. This low-density approach to development has been the traditional mode of expansion for much of the second half of the 20th century, corresponding with a boom in road construction and public desire for large-lot single-family homes. Expanded growth also generally increases the cost of providing public services. Figure 54 shows the support that this element received from survey participants.



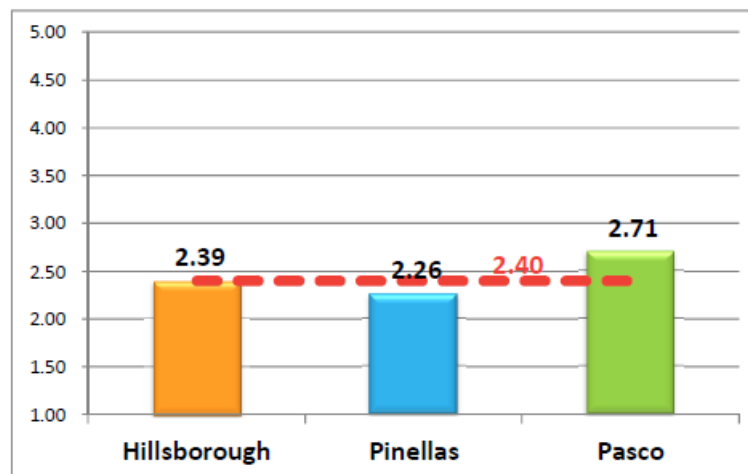
Expanded Growth Area
Development expands outward, including growing into rural areas.

Figure 54. Expanded Growth Area (Ratings)



The survey participants responded negatively to this type of improvement. In total, 7,154 participants rated this element, with approximately 56% giving it 1 or 2 stars. Pinellas County responded most negatively to this (61% rating 1 or 2 stars) and Pasco County responded less negatively to this (46% rating 1 or 2 stars). The average rating was 2.40, as shown in Figure 55.

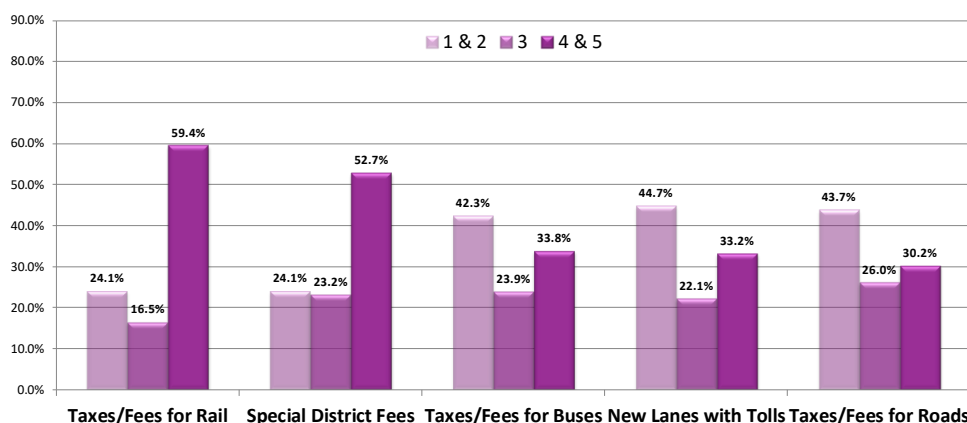
Figure 55. Expanded Growth Area (Average Ratings by County)



Funding Elements






Overall, survey participants have a generally positive view of Taxes/Fees for Rail and Special District Fees, and a somewhat negative opinion of Taxes/Fees for Buses, New Lanes with Tolls, and Taxes/Fees for Roads. Of the five funding elements, at least half of respondents gave a high rating (4 or 5 stars) to Taxes/Fees for Rail (59%) and Special District Fees (53%). Among the other elements, only about a third of survey respondents rated them highly; the most negative ratings went to New Lanes with Tolls (45%), followed by Taxes/Fees for Roads (44%) and Taxes/Fees for Buses (42%). Figure 56 summarizes the roadway element ratings for all survey participants, and Figures 57 to 59 provide the ratings summary by county.

Figure 56. Funding Elements (Ratings 1 to 5 Stars)



Taxes/Fees for Rail received the highest average rating within the funding element category at 3.61; Pasco County rated it slightly lower compared at 3.49, while Pinellas County rated it a little higher (3.70). Overall, Pasco County respondents rated funding elements related to driving/roadways higher and transit and special district funding elements lower than the tri-county average. The funding elements tied for the lowest ratings were New Lanes with Tolls and Taxes/Fees for Roads (2.76). Table 6 summarizes the funding element average ratings based on a 1 to 5 star rating. Each of the elements is discussed in more detail in the following section.

Table 6. Funding Elements (Average Ratings)

	Taxes/Fees for Rail 	Special District Fees 	Taxes/Fees for Buses 	New Lanes with Tolls 	Taxes/Fees for Roads 
All Participants:	3.61	3.47	2.84	2.76	2.76
Hillsborough:	3.67 + 0.06	3.54 + 0.07	2.87 + 0.03	2.73 - 0.03	2.79 + 0.03
Pinellas:	3.70 + 0.09	3.51 + 0.04	2.90 + 0.06	2.75 - 0.01	2.75 - 0.01
Pasco:	3.49 - 0.12	3.37 - 0.10	2.76 - 0.08	2.95 + 0.19	2.86 + 0.10

NOTES: 1) Average rating is calculated by summing the 1 to 5 star rating for each element and dividing by number of participants for each category.
2) Green or red text indicates a difference of 0.08 or greater as compared to all survey participants.

Figure 57. Funding Elements – Hillsborough County Respondents

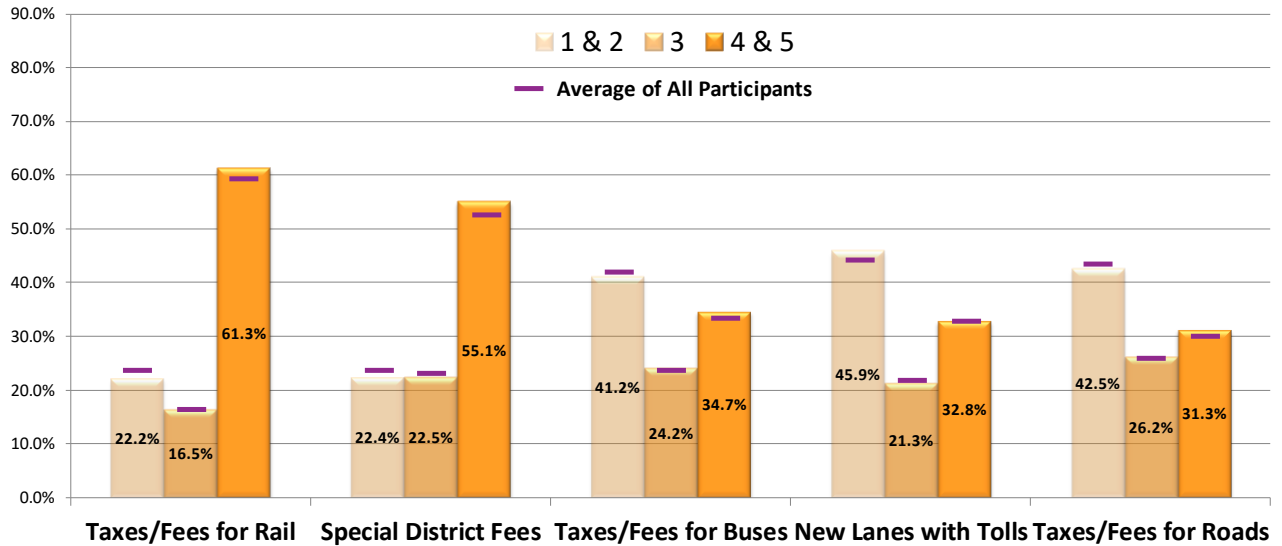


Figure 58. Funding Elements – Pinellas County Respondents

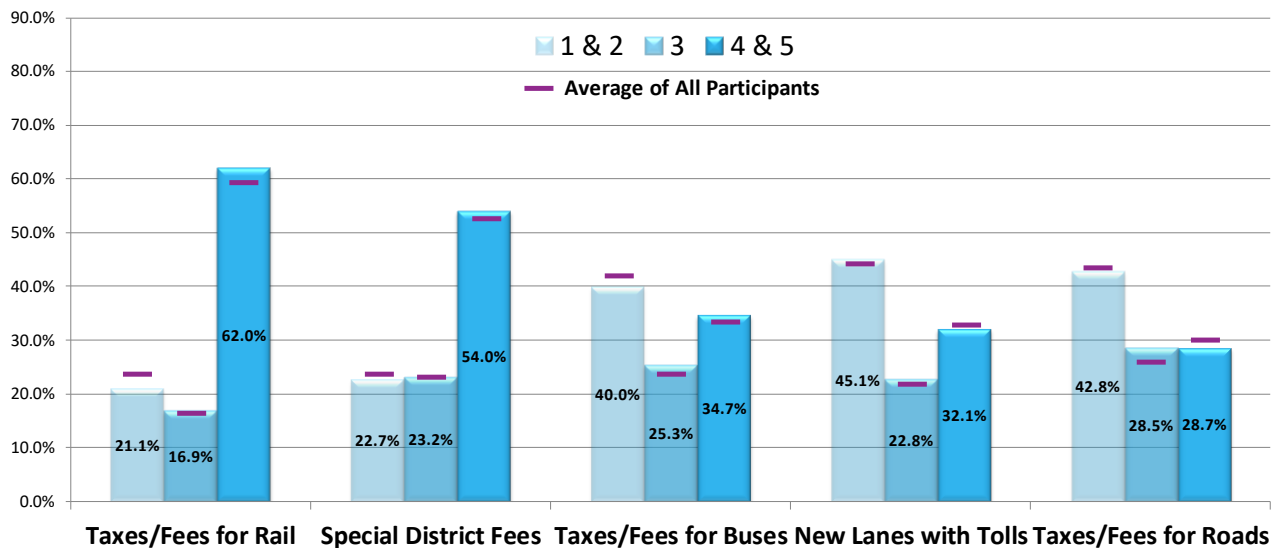
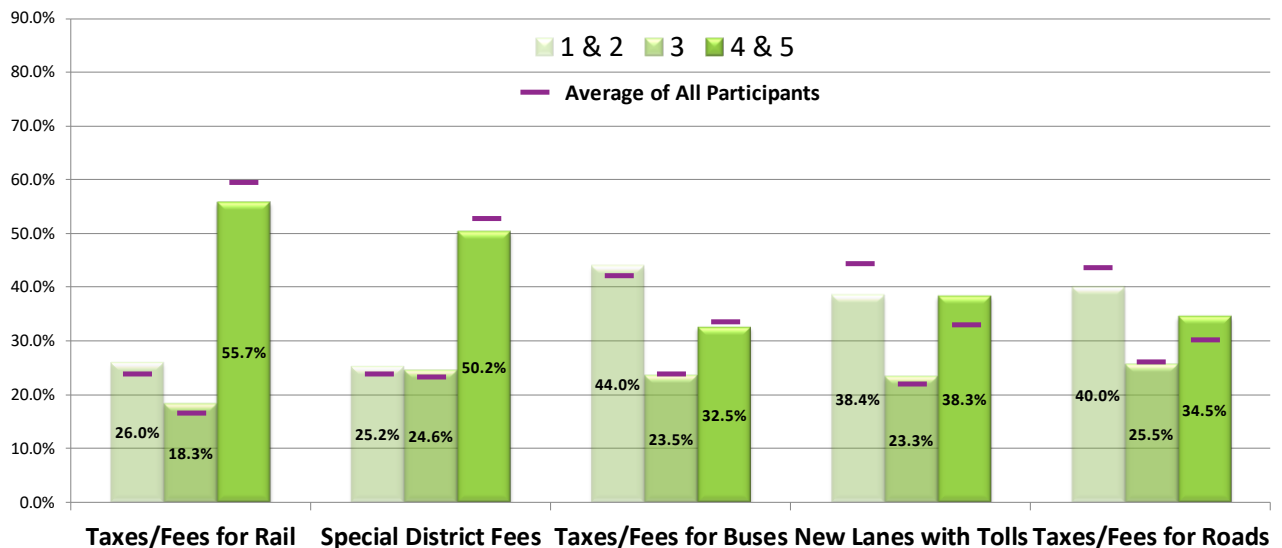


Figure 59. Funding Elements – Pasco County Respondents



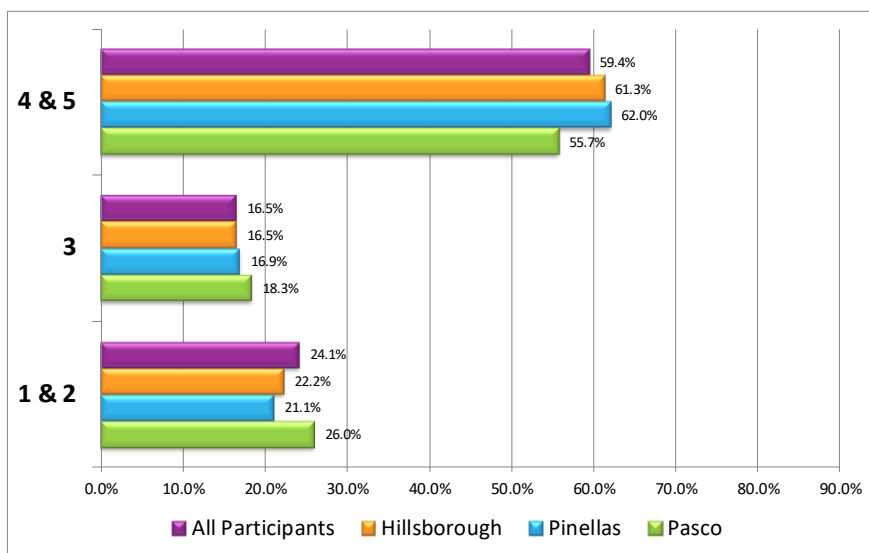
Taxes/Fees to Fund Rail

The Taxes/Fees to Fund Rail element would seek to raise local taxes and/or fees to build a regional rail system. At this juncture no specific fiscal mechanism is identified (e.g., retail sales tax, property tax increment, development impact fees), so support of this funding element can be interpreted as support for rail infrastructure improvements and willingness to raise new funding to this end (rather than relying on existing funds or revenue streams). Figure 60 shows ratings that this funding element received in the survey.



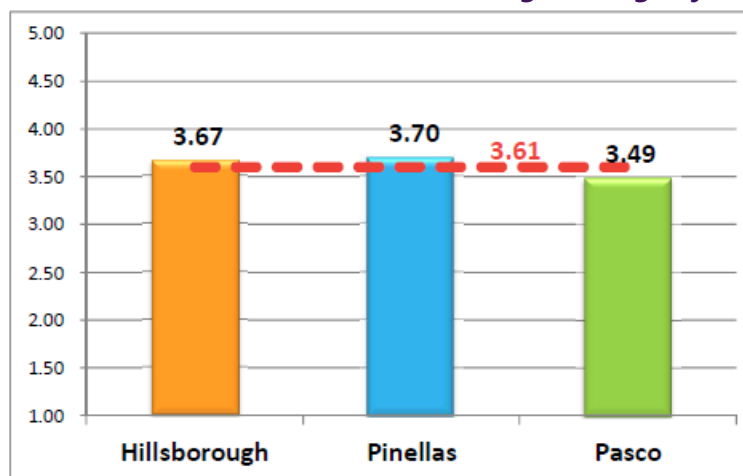
Taxes/Fees to Fund Rail
Raise local taxes and/or fees to build a regional rail system.

Figure 60. Taxes/Fees to Fund Rail (Ratings)



The majority of survey respondents responded positively to this funding strategy. In total, of the 6,518 participants who rated this element, 59% rated it 4 or 5 stars. Pinellas County responded most positively (62% rating 4 or 5 stars) and Pasco County responded least positively (56% rating 4 or 5 stars). Figure 61 shows the average rating was 3.61, with Pasco County having a slight less favorable view of this element at 3.49.

Figure 61. Taxes/Fees to Fund Rail (Average Ratings by County)



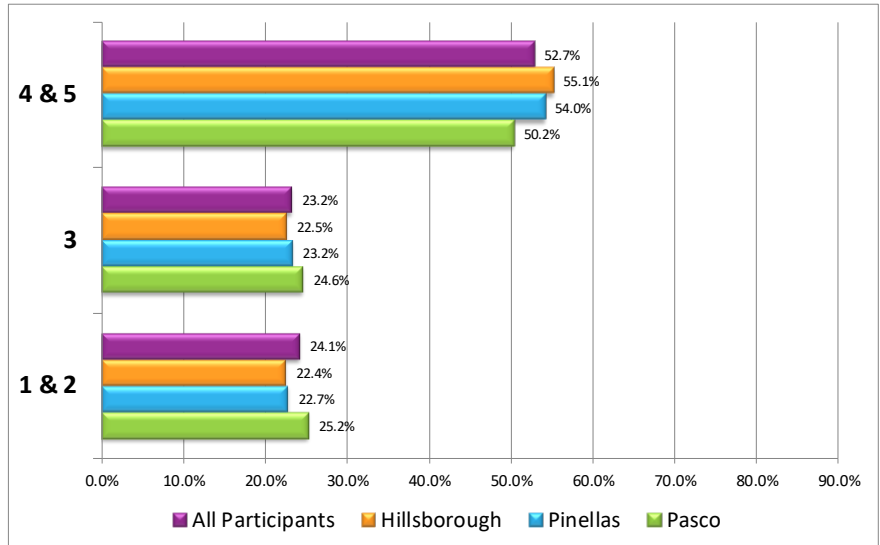
Special District Fees

The Special District Fees element would implement local fees or taxes to fund community improvements in designated areas. At this juncture no specific fiscal mechanism is identified (e.g., tax increment financing, benefit assessment district, development impact fees), so support of this funding element can be interpreted as support for revitalizing priority communities (perhaps due to a history of disinvestment or catalytic importance) and willingness to raise new funding to this end. Figure 62 shows ratings that this funding element received in the survey.



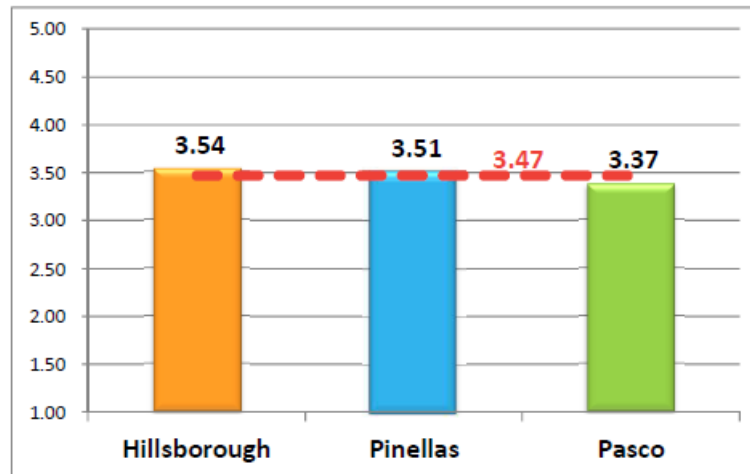
Special District Fees
 Developers and/or local property owners pay fees/taxes for community improvements in designated areas.

Figure 62. Special District Fees (Ratings)



The survey participants responded positively to this to this funding strategy. In total, 6,451 participants rated this element, with 53% rating it 4 or 5 stars. Hillsborough County responded most favorably (55% rating 4 or 5 stars) and Pasco County responded slightly less positively (50% rating 4 or 5 stars). Figure 63 shows the average rating was 3.47, with little variation between counties.

Figure 63. Special District Fees (Average Ratings by County)



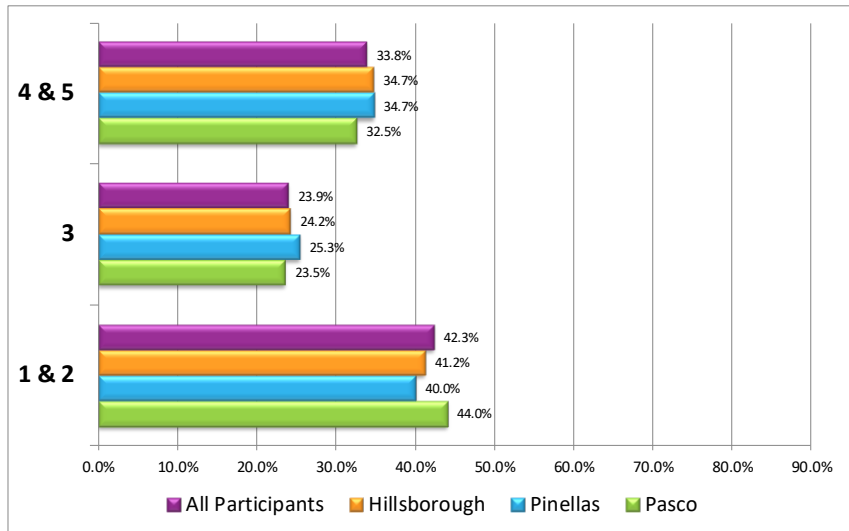
Taxes/Fees to Fund Buses

The Taxes/Fees to Fund Buses element would seek to raise local taxes and/or fees to improve regional and local bus service. At this juncture no specific fiscal mechanism is identified (e.g., retail sales tax, property tax increment, development impact fees), so support of this funding element can be interpreted as support for bus service improvements and willingness to raise new funding to this end (rather than relying on existing funds or revenue streams). Figure 64 shows the ratings that this funding element received in the survey.



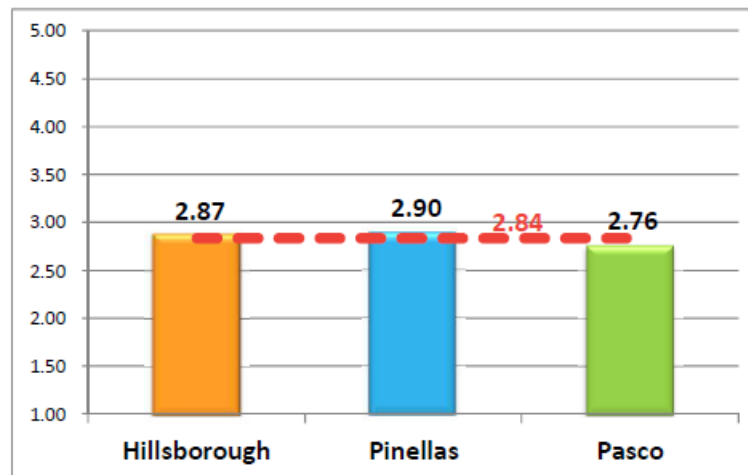
Taxes/Fees to Fund Buses
 Raise local taxes and/or fees to improve local and regional bus service.

Figure 64. Taxes/Fees to Fund Buses (Ratings)



The survey participants responded slightly negatively to this to this funding strategy. In total, 6,471 participants rated this element, with approximately 42% rating it 1 or 2 stars. Pasco County responded most negatively to this (44% rating 1 or 2 stars) and Hillsborough County responded least negatively (41% rating 1 or 2 stars). Figure 65 shows the average rating was 2.84, with little variation between counties.

Figure 65. Taxes/Fees to Fund Buses (Average Ratings by County)



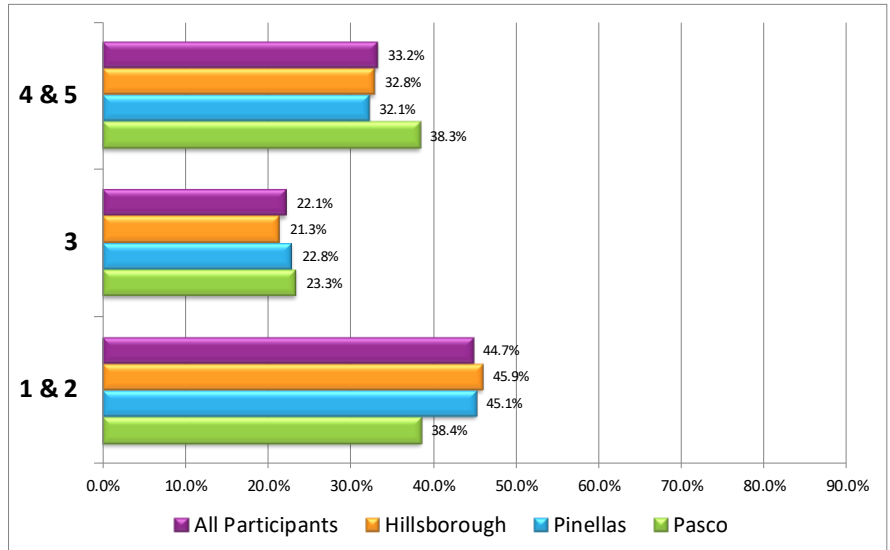
New Lanes with Tolls

New Lanes with Tolls would build new express lanes with variable tolls to manage traffic flow. While there has been discussion of new lanes with tolls on some area roadways, the overall concept for this funding element can be interpreted as support for expanded roadway capacity funded at least in part by toll revenues. Variable (or dynamically priced) tolls allow for more control over roadway demand, and thus can result in more reliable express lane travel times and higher toll revenues to fund these improvements. Figure 66 shows the ratings that this funding element received in the survey.



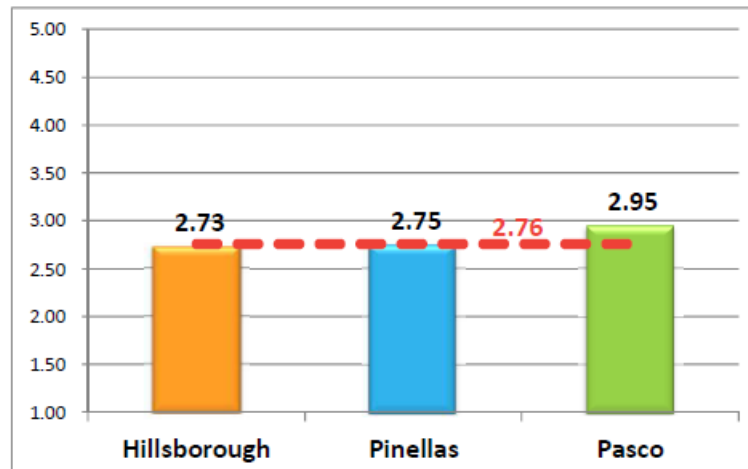
New Lanes with Tolls
Build new express lanes with variable tolls to manage traffic flow.

Figure 66. New Lanes with Tolls (Ratings)



The survey participants responded negatively to this to this funding strategy. In total, 7,134 participants rated this element, with approximately 45% rating it 1 or 2 stars. Hillsborough County responded most negatively (46% rating 1 or 2 stars) and Pasco County was evenly divided on this issue (38% 4 or 5 stars and 38% 1 or 2 stars). Figure 67 shows the average rating was 2.76, with Pasco County coming in slightly higher in support of this element at 2.95.

Figure 67. New Lanes with Tolls (Average Ratings by County)



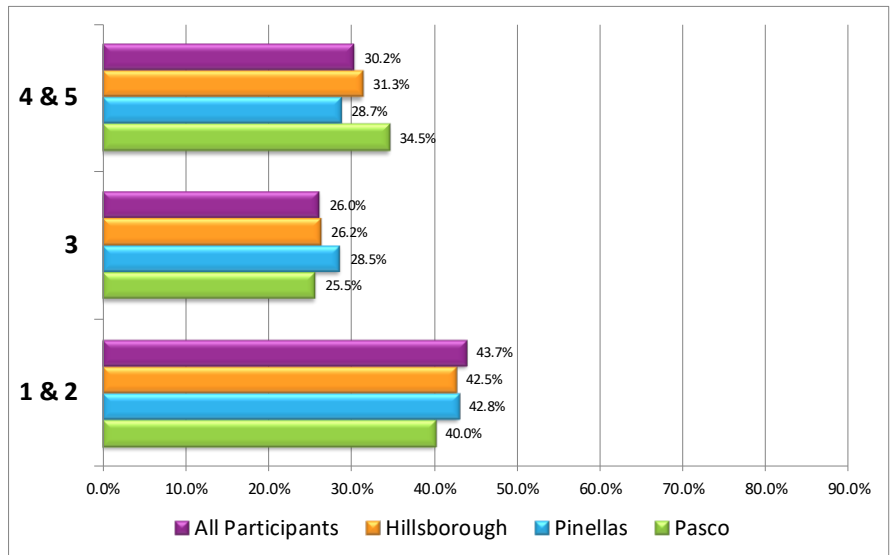
Taxes/Fees to Fund Roads

The Taxes/Fees to Fund Roads element would seek to raise local taxes and/or fees to build more roads. At this juncture, no specific fiscal mechanism is identified (e.g., retail sales tax, property tax increment, development impact fees), so support of this funding element can be interpreted as support for more roadway capacity and willingness to raise new funding to this end (rather than relying on existing funds or revenue streams). Figure 68 shows the ratings that this funding element received in the survey.



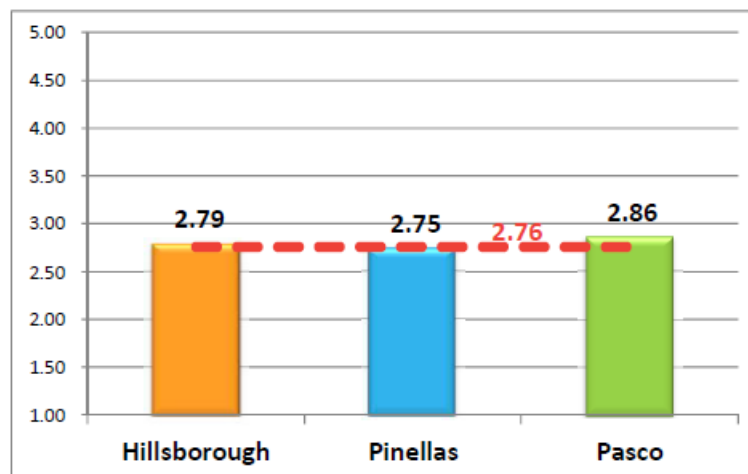
Taxes/Fees to Fund Roads
 Raise local taxes and/or fees to build more roadway projects.

Figure 68. Taxes/Fees to Fund Roads (Ratings)



The largest share of survey respondents responded negatively to this funding strategy. In total, 6,517 participants rated this element, with approximately 44% rating it negatively. Pinellas County responded most negatively to this (43% 1 or 2 stars) and Pasco County responded least negatively (40% rating 1 or 2 stars). Figure 69 shows the average rating was 2.76, for all survey participants. Pasco County respondents had a slightly higher approval of this element at 2.86.

Figure 69. Taxes/Fees to Fund Roads (Average Ratings by County)



Chapter 7 – Conclusion

It's TIME Tampa Bay involved extensive coordination and outreach between the Hillsborough, Pinellas and Pasco County MPOs. **The survey reached over 18,000 visitors and included 9,575 survey participants – a new MetroQuest record for the United States!** This large dataset contains a wealth of information that will be used to inform the development of a hybrid scenario that will guide the remaining LRTP development efforts.

Survey Highlights

Beginning with the priorities, it was clear that the primary focus of the survey responses were on addressing **traffic congestion**, and supporting **alternatives to driving**. Both of these priorities were identified by 74% to 75% of all survey respondents – the highest of all priorities. A second tier of priorities, protecting open/green space and shorter commutes, were identified by 62% to 63% of survey respondents. The remaining priorities were identified 50% or lower.

The response to exaggerated scenarios questions highlighted a clear desire among survey participants for new mobility options that would provide an alternative to driving. The preference for a **statewide rail and regional rail** system dominated the survey responses, and appeared also in the high ratings for rail transit and rail funding in the Elements section. Projects or funding mechanisms to expand the roadway network tended to receive comparatively lower levels of support, even when they included advanced technology to improve efficiency.

From a growth and development standpoint, generally speaking, respondents did not want to continue to expand outward, as shown in support for **efficient use of land** and **more/better downtowns**, as well as negativity towards an expanded growth area. Investments that focus on improving existing communities such as **preserving neighborhoods** and a **walk & bike focus**) also performed well, highlighting a common desire to improve the communities that already exist rather than expanding into open/rural areas on the fringe of Hillsborough and Pasco Counties.

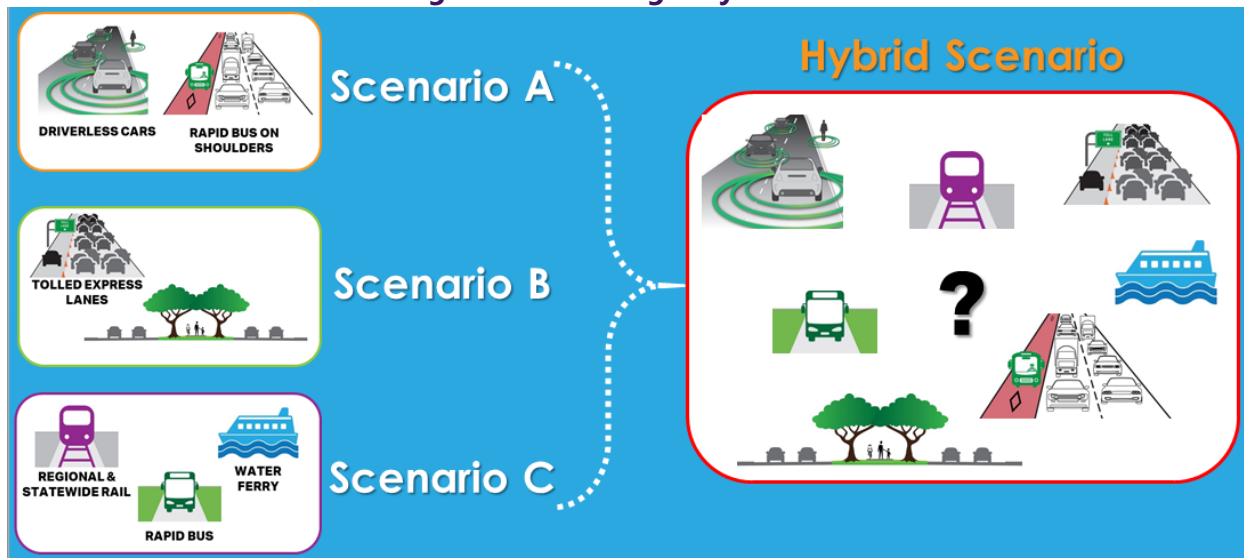
Guidance for 2045 Plan “Hybrid Scenario”

The **It's TIME Tampa Bay** exaggerated scenarios were intended to help create a hybrid 2045 scenario, based on the best and most well-supported pieces of the scenarios and elements. The primary purpose of the Scenario planning process was to help:

- Visualize long-term implications of today's decisions
- Explore “what-ifs” about things we control, and things we don't
- Build consensus with quantitative feedback to determine what long-range outcomes are the most widely accepted

Figure 70 conceptually shows how the scenarios and elements were pulled together to help identify which components would ultimately become part of a hybrid scenario. This hybrid scenario will help inform future year LRTP multimodal projects and supportive growth policies and funding strategies.

Figure 70. Building a Hybrid Scenario



Key themes from this outreach effort—comprising issues related to land use and different transportation modes—are summarized below.

Land Use

In the Hybrid Scenario, the MPOs and other transportation agencies will coordinate with local governments to support the creation of comprehensive plans that are compatible with the priorities identified within the Tri-County Transportation Plan. These priorities include:

Reinvesting in neighborhoods

In recent years there has been a resurgence of many of our urban core areas as evidenced by redevelopment and denser development in some neighborhoods. This reinvestment means we can make more efficient use of existing infrastructure, encourage newer affordable housing and stimulate more neighborhoods to improve. On-going upgrades to infrastructure and improving services in these areas can help sustain these revitalization efforts which will lead to more connected and inviting communities. Reinvestment can take many forms: improved sidewalks and cycle tracks, green infrastructure implementation for both stormwater and aesthetic benefits, grant funding to finance renovation of buildings in disrepair, installation of comfortable bus shelters, etc.

Strengthening downtowns and creating more downtown-like places

Downtowns are key areas for investment, thanks to the efficiencies that come with higher activity levels and shorter distances between people and businesses. Such development patterns are also key for an effective and efficient transit network, which has been identified as one of the key priorities in this outreach effort. Implementing policies conducive to higher density development at key nodes, as well as supporting the construction of mixed-use buildings (including market rate and affordable housing) via incentives, partnerships, or policies, will support this goal.

Minimizing outward growth

The complement of strengthening downtowns is reducing the amount of outward growth that occurs. The area is expected to grow significantly—both in population and economic activity—in

coming years, and keeping that growth manageable and sustainable will be a key component of ensuring that our communities are right-sized for our needs. Minimizing outward growth also helps reduce the cost of providing necessary public services that come with outward expansion. This outreach effort clearly demonstrates that of all transportation, growth and funding elements considered that an expanded growth area was the lowest rated, and least desirable, of all possible options.

Transportation

Within the sphere of transportation, identifying specific types of projects and investments—if not individual projects—is an area where each MPO can provide clear guidance, building off of their own analysis and expertise as well as public outreach efforts like this survey. The following highlights transportation priorities that can help guide future planning efforts:

Rail

Based on the results of this survey, rail projects should be considered as part of on-going LRTP efforts. This could include regional rail projects, like expanding the connection of Brightline from Southeast Florida through Orlando to Tampa, or developing a rail network through inter-county coordination and partnership. Streetcar service should also be considered in support of strengthened downtowns or reinvestment in historic communities. No matter the form, it is important to integrate such projects with planned connections to other complimentary transportation resources, such as Bus Rapid Transit or express bus stations.

Funding is always a critical topic for rail projects due to their higher upfront capital costs compared to bus projects. Nevertheless, tax funding for rail improvements gained significant support from responses in this survey. Evaluating potential local funding mechanisms such as tax increment financing, benefit assessment districts, rideshare fees, ad valorem vehicle taxes, sales tax, etc., to support a potential rail or other fixed guideway transit project, should be considered as part of on-going LRTP planning efforts.

Walking and Biking

Walking and biking improvements play an important role as part of an overall comprehensive transportation system. Being able to provide an attractive and low-cost alternative to a solo car trip can reduce congestion at the local level, which can translate to fewer traffic jams, shorter commutes, and increased alternatives to driving—all priorities identified in this study. Most transit trips begin and end with a walk or bike trip, so improved non-motorized connections can boost the potential market for transit agencies to draw their riders from, as well as provide increased opportunities for recreational travel and public health. In addition, better alternatives to driving is a progressive benefit for our communities' low-income or otherwise disadvantaged residents.

Road

Safety and reliability of the area roadways has been, and will continue to be, one of the top priorities of the MPOs and other transportation agencies. Based on this survey, one of the most widely supported targeted roadway improvements was the construction of new and expanded interchange ramps. Being able to move between the expressways and local roadways smoothly and safely,

without the unpredictability of chokepoints at ramps limited in either capacity or quantity, should be explored in on-going LRTP planning efforts.

The use of elevated toll roads is another roadway concept that received general support and should also be considered in further planning efforts to potentially help reduce travel delay, reduce the need for more right-of-way, enhance regional travel connections, and function as primary evacuation routes during hurricanes or major storm events. The potential congestion management benefits of this type of improvement could also potentially benefit traffic operations in the Downtown Tampa interchange area, as well as along SR 54, with potential connections between these facilities via I-75 and I-4. However, it is worth noting there was clearly a negative feeling towards the concept of “closing the loop” in Pinellas County, which included the use of an elevated toll road in the McMullen/East Lake corridor.

Technology

While it did not garner the same level of enthusiasm as the future multimodal scenario, a scenario illustrating a roadway network improved by the implementation of technological advances did elicit the support of many survey respondents. These technology advances can be simple and straightforward, such as smart technology that is used to coordinate traffic signal timings to move traffic more effectively, enhance safety and reduce travel delay. Another example is the use of dynamically priced toll lanes to enhance traffic flow and increase the predictability of travel times in tolled lanes, while keeping some lanes free for less time-sensitive travelers.

Other technology advances might include the implementation of transit signal priority systems, enabling buses operating in congestion to improve their on-time rates and thus become more attractive to potential riders. Or perhaps the use of automated shuttles—a.k.a. microtransit—to ferry people to and from transit stations; such shuttles are already being rolled out in small-scale pilot projects as of 2018—something that was nearly unimaginable just a handful of years ago. The implementation of automated buses is a technological advancement that would dramatically reduce the operating costs of many transit agencies, though its initial roll-out seems more likely in BRT-style routes with dedicated guideways rather than mixed traffic.

Regardless of the project, technology will continue to advance at a rapid pace and future transportation and mobility applications will benefit from these advancements. Based on the responses from this survey, the use of technology should be considered in on-going LRTP planning efforts. At a minimum, it is important to continue the discussion of advanced technology as part of an on-going process to educate the public about the potential transportation and mobility benefits—ultimately with the goal of helping the public become more comfortable with technology over time.