



envision
THE FUTURE OF TRANSIT IN TAMPA BAY *2030*

Regional Transit Development Plan
Technical Memorandum 4
Situation Appraisal

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Prepared for



Prepared by



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Section 1 Introduction

During the 2017 Florida Legislative session, the Tampa Bay Area Regional Transit Authority (TBARTA) underwent changes to its name and organization as part of Senate Bill (SB) 1672, known as the “TBARTA Act.” The updates to the legislation changed the name and focus of the agency from the Tampa Bay Area Regional Transportation Authority and reduced the agency membership counties from seven to five. The five-county region includes Hernando, Hillsborough, Manatee, Pasco, and Pinellas. Reference to the “Tampa Bay region” herein includes all five counties unless otherwise noted.

As described in SB 1672, TBARTA is required to develop a Regional Transit Development Plan (RTDP). This first RTDP, branded *Envision 2030: The Future of Transit in Tampa Bay*, is a strategic guide for TBARTA and its partner agencies, representing the regional vision for transit in Tampa Bay during the next 10 years. *Envision 2030* must meet the requirements of the TBARTA Act, Chapter 14-73.001, Florida Administrative Code (F.A.C.), and other relevant State and Federal requirements and will include the following major elements:

- Public involvement plan and process
- Baseline data compilation and analysis (review of regional demographic and travel behavior characteristics)
- Performance evaluation of existing services
- Situation appraisal (agency strengths and weaknesses; external barriers and opportunities; estimation of demand for transit)
- Vision, mission, and goals
- Transit demand and mobility needs
- Regional transit needs and enhancements (funded and unfunded)
- 10-year implementation and financial plan (projected costs and revenues)
- Organizational structure and role of TBARTA

Upon completion, *Envision 2030* will cover the 10-year planning horizon for Fiscal Years (FYs) 2021–2030 and will be adopted by the TBARTA Board and submitted for acceptance by Florida Department of Transportation (FDOT) Districts 1 and 7 prior to the September 1, 2020, deadline.

This is the fourth of five technical memoranda prepared for *Envision 2030* and documents the following:

- Review of local, state, regional, and federal plans and policies.
- A situation appraisal of the existing overall planning and policy environment for transit within the Tampa Bay region.

Section 2 Review of Plans & Policies

Local, regional, State, and Federal plans and studies were reviewed to understand current policies and potential implications for *Envision 2030* and TBARTA. The planning and programming documents reviewed are listed below and summarized in Table 2-1 by their geographic applicability, type of plan, responsible agency, overview of the plan/program, and key considerations for the Situation Appraisal.

Table 2-1: Summary of Plans Review

Plan Title (Date)	Geographic Applicability	Type of Plan	Responsible Agency	Plan/Program Overview	Key Considerations/Implications for <i>Envision 2030</i>
Local Plans (Transit Development Plans [TDP])					
Hernando County TDP Major Update (2019)	Hernando County	TDP	Hernando County	Last major TDP update, serves as guide for fixed-route system and complementary service required by the Americans with Disabilities Act (ADA) over next 10 years.	<ul style="list-style-type: none"> Looks to establish intercounty, regional transit connectivity along two major corridors by 2024: Commuter express service along SR 50 from Brooksville to I-75; would connect east Hernando County to rest of TheBus system, connecting jobs and services in Brooksville and most of central and west side of Hernando County with the east. Commuter express service on Suncoast Parkway to connect to major employment/ shopping centers south of Hernando County; would connect to future PCPT route on SR 52 to extend service through Pasco and into Hillsborough.
Manatee Connect TDP (2018)	Manatee County	TDP	MCAT	Last major TDP update, serves as guide for fixed-route system and complementary ADA service over next 10 years.	<ul style="list-style-type: none"> Proposes enhanced frequencies on Route 99, which provides service between Manatee and Sarasota counties along US 41. Ensures that MCAT representatives will review and attend local and regional economic development, land use planning, and transportation planning meetings at which major development along existing transit corridors will be reviewed/discussed. Highlights continued coordination with other transportation agencies regarding improving system to system connectivity.
Access Pasco TDP Major Update (2018)	Pasco County	TDP	PCPT	Last major TDP update, serves as guide for fixed-route system and complementary ADA service over next 10 years.	<ul style="list-style-type: none"> Ensures coordination and consistency between regional and state plans for future provision of public transit. Encourages cooperative efforts with neighboring county transit systems, including HART, PSTA, and TheBus. Proposed regional or regionally significant services include: <ul style="list-style-type: none"> Shady Hills Connector, providing service from SR 52, connecting with TheBus Blue route at Hernando-Pasco county line. Peak hour express service along SR 52, connecting east and west Pasco County. Encourages local jurisdictions, planning agencies, and development community to support transit-supportive development patterns and investments.
HART TDP Major Update and Comprehensive Operational Analysis (COA) (2017)	Hillsborough County	TDP	HART	Conducted as part of HART's last major TDP update to review efficiency of HART's existing services. FY 2018 system redesign (<i>Mission MAX</i>) set foundation of TDP recommendations, focused on creating framework for high-frequency core network, exploring new transit modes, and integrating relevant technologies. Also focused on facilitating regional connections with Pasco, Polk, and Pinellas counties.	<ul style="list-style-type: none"> Emphasis on transit services that improve operating frequencies on core routes, reduced trip travel times, and increased directness of travel paths. Provides direction for creating high-frequency grid in future. Led to implementation of Mission Max as outlined in base year of TDP; subsequent-year transit improvements include improved core frequencies. Also mentions coordinating with other transit agencies to promote regional and local cooperation on transit issues and needs.
PSTA TDP Major Update (2015)	Pinellas County	TDP	PSTA	Last major TDP update, serves as guide for fixed-route system and complementary ADA service over next 10 years.	<ul style="list-style-type: none"> Identified improving regional connectedness on several routes within 10-year operating and capital priorities. Includes increasing service hours and frequency and resulting revenue vehicle expansion on regional express routes. Documents coordination on regional fare system; PSTA participating in recently implemented Flamingo Fare, which allows riders to pay using re-loadable smartcard or smartphone app for rides on participating systems—PSTA/Jolley Trolley, TheBus, HART/TECO Line Streetcar System, PCPT, and Sarasota (SCAT).
Local Plans (Long Range Transportation Plans [LRTP])					
Imagine 2040 (2014)	Hillsborough County	LRTP	Hillsborough MPO	Major LRTP element that continues policy framework established by previous plans and studies for countywide multimodal transportation system. Reviews eight funding scenarios that consider three investment levels for transportation projects: no new revenue, ½-cent sales tax, and one-cent sales tax.	Identified fixed guideway projects as part of cost-feasible project list in all three investment scenarios; projects include connecting Downtown Tampa to the University of South Tampa (USF), Ybor City, and Westshore District; Tampa International Airport (TIA) to Westshore District; and fixed guideway transit center at Westshore District. Also promotes cooperation with TBARTA, Transportation Management Area (TMA), and other agencies to advance regional rail system and other major multimodal transportation improvements within region. Also considers use of tolls, user fees, and innovative funding for regional projects.
It's TIME Hillsborough (draft reviewed; plan to be adopted late 2019)	Hillsborough County	LRTP	Hillsborough MPO	Guides multimodal transportation system improvements in Hillsborough County until 2045.	Regional premium and express projects identified as needs in plan include USF-Downtown Rail, Florida Avenue Bus Rapid Transit (BRT), Hillsborough Avenue BRT, Plant City Express, Veterans Express. Transit improvements identified will be evaluated for inclusion in <i>Envision 2030</i> Regional Transit Vision.
Mobility 2040 (2015)	Pasco County	LRTP	Pasco MPO	Guides multimodal transportation system improvements in Pasco County until 2040.	<ul style="list-style-type: none"> Promotes local/regional connectivity through multimodal design, by offering connections to local/regional activity centers. Ensures consistency with local comprehensive plans and applicable regional plans. Going forward, ensures regional vision and coordination with adjacent MPOs, counties/cities, and regional agencies.

Plan Title (Date)	Geographic Applicability	Type of Plan	Responsible Agency	Plan/Program Overview	Key Considerations/Implications for <i>Envision 2030</i>
Mobility 2045 (draft reviewed; plan to be adopted late 2019)	Pasco County	L RTP	Pasco MPO	Guides multimodal transportation system improvements in Pasco County until 2045.	<ul style="list-style-type: none"> Identified transit service improvements prioritized using multi-criteria evaluation process. New premium transit service improvements include Regional Rapid Transit on I-275, SR 54 Premium Service (potentially BRT service in exclusive lane), US 19 Premium Bus Service, Bruce B. Downs/Wesley Chapel BRT, Dale Mabry/US 41 Premium Transit, Regional Rail on US 41. New express service improvements include SR 54 Cross County Express, US 19 Express, Suncoast Express, Regional Express on I-75, Wesley Chapel/USF Express, Spring Hill Connector Limited Express, SR 52 Cross County Express. Transit improvements identified in Mobility 2045 will be evaluated for inclusion in <i>Envision 2030</i> Regional Transit Vision.
2040 LRTP (2015)	Pinellas County	L RTP	Pinellas County	Guides multimodal transportation system improvements in Hernando County until 2040.	<ul style="list-style-type: none"> Promotes regional connectedness along its major corridors and accommodates other multimodal transportation services. Promotes connections to major activity centers or areas with the highest densities. Ensures cooperation with neighboring transit agencies and other agencies to promote future transportation investments.
Advantage Pinellas (draft reviewed; plan to be adopted late 2019)	Pinellas County	L RTP	Forward Pinellas	Guides multimodal transportation system improvements in Hernando County until 2045.	<p>2045 LRTP Needs Plan identifies the following regional transit improvements:</p> <ul style="list-style-type: none"> Express bus or premium transit service between downtown St. Petersburg and downtown Tampa via Gandy corridor. With Selmon Extension under construction and Gandy Bridge undergoing design study, opportunity for dedicated transit lanes. Express bus service between Clearwater Beach, TIA, and downtown Tampa via SR 60/Courtney Campbell Causeway. FDOT and PSTA working on design for busway along Memorial Causeway Bridge that would improve transit travel times, providing incentive for people to use transit instead of driving and paying to park at beach. Express bus service between Oldsmar and Hillsborough County along SR 580 to serve large amount of employment growth anticipated for Oldsmar area by 2045 and attraction of Countryside Mall and downtown Dunedin. Express bus service between New Port Richey (Pasco County) and employment destinations in Pinellas County (terminating in Gateway area). Permanent passenger ferry service between downtown St. Petersburg and downtown Tampa. Premium transit service along I-275 between downtown St. Petersburg and Wesley Chapel in Pasco County. Design study for corridor currently underway.
2040 LRTP (2015)	Hernando and Citrus counties	L RTP	Hernando/Citrus MPO	Guides multimodal transportation system improvements in Hernando County until 2040. 2045 LRTP update currently underway.	<p>Includes plan for one-cent local government infrastructure surtax, to be used in part to improve multimodal transportation system. Long-term proposed improvements include:</p> <ul style="list-style-type: none"> Expanding/enhancing existing transit services Enhancing ADA accessibility at existing bus stops Increasing access between surrounding counties and Hernando County via public transportation The Hernando/Citrus MPO is in the process of updating the LRTP to include a 2045 planning horizon; however, no transit projects are yet available for review.
Sarasota/Manatee MPO 2040 LRTP (2015)	Manatee and Sarasota counties	L RTP	Sarasota/Manatee MPO	Guides multimodal transportation system improvements in Manatee and Sarasota counties until 2040.	<ul style="list-style-type: none"> Goals and objectives outline priorities to improve transit safety, increase transit revenue hours that connect key employment centers, strengthen walkable and connected communities via transit service expansion, and advocate for transit-supportive development patterns. Sets forth framework for developing regional TOD-supportive land use vision and tools and thresholds for assessing readiness of existing corridors. Identifies community agreement that more robust transit network required to reduce demands placed on roadways. Key areas for transit to expand its footprint with support of public include BRT service between Sarasota and Bradenton and between Bradenton and St. Petersburg.
Other Local Transit Plans/Studies					
Central Avenue BRT (ongoing)	Pinellas County	Corridor Study	PSTA	This project is being undertaken to provide BRT service to link downtown St. Petersburg to St. Pete Beach via 1 st Avenue S/N and Pasadena Avenue.	<ul style="list-style-type: none"> Central Avenue BRT project will link downtown St. Petersburg to St. Pete Beach. BRT route is 20 miles roundtrip, proposed to have 31 stations, and will operate from 6:00-12:00 AM with 15-minute frequencies during day and 30-minute frequencies in late evenings. First transit project of its kind in Tampa Bay region to advance in Federal Transit Administration (FTA) Capital Investment Grants (CIG) Program. Will provide new transportation option for tourists visiting downtown St. Petersburg and beaches, provide unprecedented affordable commute option for 50,000 jobs located within ½ mile of project corridor. Currently moving forward to implementation, will be critical component of <i>Envision 2030</i> Regional Transit Vision.

Plan Title (Date)	Geographic Applicability	Type of Plan	Responsible Agency	Plan/Program Overview	Key Considerations/Implications for <i>Envision 2030</i>
Regional Plans/Studies					
Tampa Arterial BRT Study (ongoing)	Hillsborough County	Corridor Study	HART	Looking to improve local, street-level bus service along Florida, Nebraska, and/or Fowler avenues and adjacent corridors between USF and downtown Tampa.	<p>Three main objectives:</p> <ul style="list-style-type: none"> • Improve safety and transit operating conditions, reduce passenger travel times for bus routes on Florida, Nebraska, and/or Fowler between USF and downtown Tampa. • Improve east-west route connectivity that cross USF to downtown Tampa corridor. • Improve local transit access on Florida, Nebraska and/or Florida for communities between USF and downtown Tampa, including bicycle/pedestrian connectivity and signalized crossing improvements throughout area for eventual connection to potential premium transit alignments.
Intermodal Centers Study (ongoing)	Selected locations in Pasco, Hillsborough, and Pinellas counties	Regional Plan	FDOT District 7	Determining type of facility needed to facilitate transfers between existing and planned services and to identify potential locations of future intermodal centers at each of five locations.	<ul style="list-style-type: none"> • Seeks to enhance local and regional connectivity, mobility, and accessibility, maximize transit-oriented development and redevelopment potential around each site while preserving character of community and natural environment. • Focuses on intermodal centers in Gateway area of Pinellas County; Westshore, downtown, and USF area of Tampa; and Wesley Chapel in Pasco County, each to facilitate regional transit connections. • Ongoing and specific sites for four centers (Westshore excluded) not yet identified; regional transit connections to general areas where centers will be located considered in developing <i>Envision 2030</i> Regional Transit Vision.
Regional Rapid Transit (ongoing)	I-275 corridor in Pinellas, Hillsborough, and Pasco counties	Regional PD&E Study	TBARTA	PD&E study to advance BRT project connecting downtown St. Petersburg, Gateway area, Westshore, downtown Tampa, USF area, and Wesley Chapel from concept towards implementation.	<ul style="list-style-type: none"> • Identified as the catalyst project in the Regional Transit Feasibility Plan (see below). • Goal is to provide all-day regional service that is quick, safe, reliable, and frequent to provide critical inter-county transit option for commuters and other transit users. • Two-year study to determine amount of route dedicated (uses lane separate from cars), where stations will be, and how vehicles will get to stations. • Will also determine approximately how much it will cost and how it will be paid for and provide necessary information to apply for Federal funds to move towards implementation. • Currently moving from conceptual planning to PD&E will be critical component of <i>Envision 2030</i> Regional Transit Vision.
Regional Transit Feasibility Plan (RTFP) (2018)	Hillsborough, Pasco, and Pinellas counties	Regional Plan	Administered by HART; Funded by FDOT District 7	The RTFP built upon the 55+ transportation plans and studies completed by Tampa Bay area agencies over the past 30+ years to create the vision of future transit in the three-county region.	<ul style="list-style-type: none"> • The RTFP examined potential regional transit options in the three-county region, first at a high level by creating a Regional Transit Vision for the future followed by a more in-depth review of each project in that vision. • Projects were evaluated and scored based on how well each is expected to fulfill local needs and the requirements set forth to qualify for Federal and State grants. • The catalyst project, or first project from the plan recommended for implementation, is the I-275 Rubber Tire Concept from downtown St. Petersburg to Wesley Chapel. As previously noted, the RRT is the PD&E study for the catalyst project and is designed to comply with the FTA's CIG program. • The three-county regional vision from the RTFP will serve as a starting point for the <i>Envision 2030</i> Regional Transit Vision, which will also include Hernando and Manatee counties within TBARTA's five-county service area.
TBARTA Master Plan (2015)	FDOT District 7	Regional Plan	TBARTA	Update to TBARTA's Master Plan that serves as regional LRTP; continued to examine high capacity corridors that deserve attention to improve mobility within region.	<ul style="list-style-type: none"> • Acknowledges that population growth in Tampa Bay region expected to increase 43% by 2040; commute times expected to double by 2040. Since majority of cross-country travel occurs between Hillsborough, Pasco, and Pinellas counties, plan identifies regional and future priority projects to target in coming year(s). • Transit elements included for Hillsborough, Pasco, and Pinellas counties incorporated into RTFP; therefore, applicable transit elements have been incorporated into <i>Envision 2030</i> Regional Vision.
Westshore Area to Crystal River/Inverness Transit Corridor Evaluation (2015)	FDOT District 7	Regional Plan	TBARTA	Examined extension of premium transit from Westshore area in Tampa to north Hillsborough, Pasco, Hernando, and Citrus counties via SR 589 (Veterans Expressway/Suncoast Parkway).	<ul style="list-style-type: none"> • Final study recommended 3 transit service alignments, 14 stations/stop locations, and 12 park-and-rides. Full implementation of service includes all-day service to all alignments in corridor, including SR 54/US 19 alignment 1, Brooksville/Inverness alignment 6, Crystal River/ Lecanto alignment 4A/B. Full-service plan not envisioned until after 2035. However, needs identified in study being considered as part of <i>Envision 2030</i>.
USF to Wesley Chapel Regional Transit Corridor Study (2014)	FDOT District 7	Regional Plan	TBARTA	Purpose to evaluate premium transit options for corridor from USF area in Hillsborough County to Wesley Chapel area in Pasco County,	<ul style="list-style-type: none"> • Study developed to include Bruce B. Downs Boulevard as a feasible express bus service route for premium transit. Southern portion of corridor would serve USF, James A. Haley Veteran's Hospital, Florida Hospital, and Moffitt Cancer Center; northern portions would serve Hunters Green, Pebble Creek, and Wesley Chapel areas. Eventually could become phased service with more modest service operating in 2020. However, project development for proposed corridor dependent on future corridor growth and development.

Plan Title (Date)	Geographic Applicability	Type of Plan	Responsible Agency	Plan/Program Overview	Key Considerations/Implications for <i>Envision 2030</i>
Short-Term Regional Premium Transportation Enhancements (2013)	FDOT District 7	Regional Plan	TBARTA	Prepared to identify short-term projects to provide regional premium transportation services.	<ul style="list-style-type: none"> Identified potential projects and opportunities in study area that support premium transit services that should be considered as part of <i>Envision 2030</i>. The priority projects include BRT from Sarasota to Bradenton. Express Bus includes managed lanes on SR 54/56 corridor, I-75 regional express bus downtown Tampa to SR 54, I-75 regional express bus from Tampa (crosstown) to Bradenton and Sarasota via SR 64 and Fruitville/Bee Ridge, extension of Sarasota BRT as regional express bus to North Port. Express Bus options on Veterans/Suncoast Parkway include Westshore to Pasco, Hernando, Citrus via SR 50, US 19, SR 44. Short Distance Rail includes Gateway to St. Petersburg via I-275/4th Street, USF to Wesley Chapel/Wiregrass via Bruce B. Downs, ND Howard Frankland Bridge.
Sarasota Manatee Area Regional Transit (SMART) Connect Study (2013)	FDOT District 7	Regional Plan	TBARTA	Premium transit feasibility study to examine and evaluate potential premium transit options that would produce greater number of mobility options for northbound and southbound travel within the county.	<ul style="list-style-type: none"> Developed viable options available to public for comment. Some include commuter express services on I-75 from North Port Station to Palmetto Station, alternative commute option on Bee Ridge Road and Fruitville Road. Also considers BRT service from Airport/University Station to Bee Ridge Station and rapid connect BRT service from North Port Station to Palmetto Station via US 41. Next step includes agency collaboration so SMART Connect Viable Options could be implemented by 2035.
Pinellas Alternatives Analysis (2012)	FDOT District 7	Regional Plan	TBARTA	Identifies premium transit options to improve Pinellas County and West Coast Central Florida's quality of life by connecting people with activity centers, employment, and major residential areas.	<ul style="list-style-type: none"> Identified locally preferred alternative (LPA) that connects downtown St. Petersburg to downtown Clearwater and downtown Tampa. LPA would use portions of I-275, Howard Frankland Bridge, and East Bay Drive, among others. Identified LPA would have 16 stations and new maintenance facility to support increase in infrastructure; however, funding for project predicated on approval of sales-tax referendum for Pinellas County Greenlight Plan, which was not approved by Pinellas County voters.
SR 54/56 Transit Corridor Study (2011)	FDOT District 7	Regional Plan	TBARTA	Identified by TBARTA to have premium bus service-possibly BRT, express on managed lanes, express in mixed traffic, or combination of both.	<ul style="list-style-type: none"> Premium transit on this corridor would serve transit riders from New Port Richey to Wesley Chapel. Based on summary, evaluation found that express bus in managed lanes would be most appropriate. However, FDOT did not move forward with bid due to disagreements regarding financing and design concepts.
State Plans					
Complete Streets Implementation Update: Handbook and Design Manual (2018)	Florida	State	FDOT	Developed to create alternative transportation systems to facilitate "Complete Streets" focused design.	FDOT's Complete Streets Policy states that agency will routinely plan, design, construct, reconstruct and operate context-sensitive transportation network that works for all modes of travel. Implementation framework for policy includes revising guidance, standards, manuals, policies, and other documents; updating how decision-making is processed; modifying performance evaluation processes; managing communication between agencies; and updating training and education.
Florida's Strategic Intermodal System (SIS) (2015)	Florida	State	FDOT	Establishes framework for management and planning Florida's SIS, a high priority network of transportation facilities important to state's economic competitiveness.	<ul style="list-style-type: none"> Will help ensure efficiency and reliability of multimodal transportation connectivity between Florida's economic regions. Will expand transportation choices and integrate modes for interregional trips. Will provide transportation systems to support Florida freight networks to improve trade, tourism, talent, innovation, business, and investment.
State of Florida Transportation Disadvantaged 5-year/20-year Plan (2007)	Florida	State	Florida Commission for the Transportation Disadvantaged (FCTD)	Purpose is to accomplish cost-effective, efficient, unduplicated, and cohesive TD services within its respective service area.	<ul style="list-style-type: none"> Develop and field-test model community transportation system for persons who are transportation disadvantaged; create strategy for FCTD to support development of universal transportation system.
Florida Transportation Plan (FTP): Horizon 2060 (2005)	Florida	State	FDOT	Looks at a 50-year transportation planning horizon, addresses how and where State investments in transportation made.	<ul style="list-style-type: none"> Supports development of state, regional, and local transit services through series of related goals and objectives, emphasizing new and innovative approaches by all modes to meet needs today and in future.
Federal Transportation Funding Authorization					
FAST Act (2016)	United States of America	Federal	US DOT	Enacts five years of funding for US surface transportation infrastructure, including transit systems and rail transportation network. Provides long-term certainty and more flexibility for states and local governments, streamlines project approval processes, and maintains strong commitment to safety.	<ul style="list-style-type: none"> Increases dedicated bus funding by 89% over life of bill. Provides stable formula funding and competitive grant program to address bus and bus facility needs. Reforms public transportation procurement to make Federal investment more cost effective and competitive. Consolidates and refocuses transit research activities to increase efficiency and accountability. Establishes pilot program for communities to expand transit using public/private partnerships. Provides flexibility for recipients to use Federal funds to meet their state of good repair needs. Provides for coordination of public transportation services with other federally-assisted transportation services to aid in mobility of older adults and individuals with disabilities.

Section 3 Situation Appraisal

Florida Rule 14-73.001 notes that, at a minimum, a Situation Appraisal should include the effects of land use, State and local transportation plans, other governmental actions and policies, socioeconomic trends, organizational issues, and technology of the transit system.

The Situation Appraisal elements have been organized under the four key regional transit agency roles identified from the peer review—Planning, Funding, Operations, and Image. The assessment of these elements, as summarized on the following pages, identifies implications for the Tampa Bay region’s existing transit services and sets the stage for defining related roles TBARTA may play in the future.

Figure 3-1 indicates which of TBARTA’s guiding principles each Situation Appraisal element addresses.

Figure 3-1: Situation Appraisal Elements and TBARTA’s Guiding Principles

Situation Appraisal Elements	Guiding Principles									
	Implementation Focus	Regional Partnerships	Integrated Planning	Sustainable Funding	Community Engagement	Innovative Solutions	Safe and Efficient System	Environmental Stewardship	Economic Development	Socioeconomic Mobility
PLANNING										
Socioeconomic Trends			✓							✓
Travel Behavior & Commuting Trends			✓						✓	✓
Land Use Policy			✓					✓	✓	
Community Feedback					✓					
Transit Technologies	✓	✓	✓			✓			✓	✓
FUNDING										
	✓	✓	✓	✓						
OPERATIONS										
Transit Operations	✓	✓	✓				✓		✓	✓
Organizational Attributes	✓									
IMAGE										
		✓	✓							

3.1 Planning

3.1.1 Socioeconomic Trends

Socioeconomic trends, such as growth in population, impact a community's need for transportation options. Key findings from the assessment of socioeconomic trends conducted previously are summarized as follows:

- Population forecasts estimate the region's population will grow by 43% to more than 4.65 million residents by 2045. All counties, except for Pinellas, will experience at least 50% growth during that timeframe. Because Pinellas County is nearly built out, most of its future will come from redevelopment into higher density land uses, such as apartments and condominiums.
- The highest existing population densities are concentrated in downtown Tampa, the University area surrounding the USF main campus, and downtown St. Petersburg. Densities in these areas are projected to increase the greatest by 2030, primarily due to growth in multi-family housing.
- Employment densities in major employment centers of downtown St. Petersburg, downtown Tampa, Westshore, the Greater Gateway area, and the University area will continue to intensify. Employment densities are also projected to increase in New Port Richey, along the SR 54/56 corridor, and in Bradenton.
- By 2030, the population of residents age 65 and older is projected to grow by 25%, and millennials currently and will continue to represent a significant percentage of the region's population (25%).
- Since 2000, the percentage of the region's population living in poverty has increased by nearly 3.4%. Today, areas with the highest poverty levels are in southeast St. Petersburg and areas north of downtown Tampa.
- In total, 35% of the region's residents are minorities, with Hispanics/Latinos being the largest minority group. As demonstrated by on-board surveys conducted by transit agencies throughout the region, minorities are a disproportionately higher percentage of transit riders than of the general population.
- Areas with higher concentrations of carless households highly correlate with areas of high concentrations of persons living below the poverty level.
- Over the last five years, the growth in annual transportation disadvantaged (TD) trips has outpaced growth in the potential TD population.
- Tens of millions of tourists visit the Tampa Bay region each year and are a critical group of potential riders that must be considered when identifying regional transportation needs.
- A Transit Orientation Index (TOI) was developed to assist in identifying areas of the region where these traditional rider markets exist. Many areas that exhibit a "high" or "very high" orientation toward transit are currently served by existing transit. Most block groups that are considered "medium" or higher categories are concentrated in areas of high population, dwelling units, and

employment whereas the areas that are considered to have a “low” orientation towards transit are observed in areas with lower densities.

Socioeconomic Trends



Implications

The significant growth projected to occur over the next 10 years, particularly in the more rural counties, will lead to inefficiencies in service delivery if innovative changes to transit in the region are not made.

Millennials are one of the largest populations represented in the region and tend to desire more choices and flexibility in transportation options. However, in addition to attracting the younger generations, maintaining mobility and freedom for the aging adult population is a key consideration for future transit service.

Providing a safe and convenient regional transit network that transports tourists from their arrival points to key destinations throughout the region will enhance the overall attractiveness of Tampa Bay. Shifting trips generated by visitors from the region’s roadways to transit will also help alleviate congestion, particularly during peak seasonal months.

As the region’s TD needs are increasing, consideration for regional TD services should be considered to increase travel options for this population group.

3.1.2 Travel Behavior & Commuting Trends

It is important to understand existing travel and commuting behaviors to determine possible impacts or benefits affecting public transportation service. Some key findings include the following:

- According to the most recent Census Transportation Planning Products Program (CTPP) data, 97% of the 1.43 million people who work in the Tampa Bay region also live there.¹
- Within the region, most commuters (80%) continue to use their personal vehicles to commute. The remaining 20% carpool (8.5%), work from home (6.6%), walk (1.4%), use public transportation (1.3%), or use other means of travel (2.2%).²
- The average commute time is considerably longer for transit commuters than for those who drive.³
- Approximately 20% of the region’s population commute to work in another county other than the one in which they live.⁴

¹ CTPP data based on U.S. Census Bureau, American Community Survey (ACS) 2012-2016 5-Year Estimates

² ACS 2013–2017 5-Year Estimates

³ ACS 2013–2017 5-Year Estimates

⁴ CTPP data based on U.S. Census Bureau, American Community Survey (ACS) 2012-2016 5-Year Estimates

- The three most significant intercounty commute patterns in the region are Pinellas to Hillsborough, Pasco to Hillsborough, and Hillsborough to Pinellas. Pasco County has the highest number of employed residents (approximately 81,500 or 44%) that leave the county for work elsewhere.⁵
- According to annual average daily traffic (AADT) data, inter-county roads within the Tampa Bay region carry approximately 1.2 million daily trips, particularly on the more significant roads that could facilitate regional transit service. The most congested inter-county roads include segments of I-75, I-275, I-4, and US 19.⁶
- According to the Density Threshold Assessment (DTA), most areas that meet the range of dwelling unit and employment thresholds for transit investment are adjacent to transit routes. However, growing areas in Brandon, Plant City, and unincorporated Manatee County that have minimum densities that are transit-supportive are not currently adjacent to existing transit services.

Travel Behavior & Commuting Trends

Implications



Given the challenge of today’s longer transit commute times, *Envision 2030* should focus on improvements that make transit services more competitive with the single-occupant vehicle to attract the “choice” rider market. Facilitating better inter-county travel will also benefit riders who depend on transit for their daily travel needs but where traveling around the region using transit is currently a challenge or, in some instances, not possible.

Offering a more well-connected and frequent transit service can help establish transit as an integral part of travel behavior. An overall increase in transit frequencies to key employment centers along the more congested corridors will be needed to significantly increase ridership in the Tampa Bay region.

3.1.3 Land Use Policy

To better assess the impact of local land use conditions and policies on public transportation needs, it was important to identify the current and future areas of the region that may benefit the most from the provision of public transit services. Key findings from a review of current and future land use conditions within the five counties are as follows:

- The land use pattern in Hernando County is predominately low-density residential in nature, with significant areas designated for rural, mining, and conservation uses. There are a few

⁵ ACS 2013–2017 5-Year Estimates

⁶ FDOT District 7 2017 traffic volumes

pockets of higher concentrations of commercial uses, particularly along major corridors, and planned developments in the southern half of the county. In Hernando County's 2040 Comprehensive Plan, the maximum densities were increased from 16 to 22 dwelling units per gross acre to help promote high density developments.

- In Pasco County, the largest residential land use classifications by area, predominately in the southern half of the county, are low- to medium-density in nature. Areas that are classified as medium- to higher-density residential uses are typically located in the areas immediately outside municipal boundaries and along major corridors. Areas of mixed use are predominantly in south-central county. Pasco has also established SR 54/56 as a transit emphasis corridor, which contains six transit center overlay areas.
- Hillsborough County has identified "Areas of Opportunity" to be examined for future transit development and enhancement—downtown Tampa, Ybor City, Tampa Heights, Westshore, areas north of TIA, the University area, and the greater Brandon area.
- The City of Tampa has stated goals to make its three Planning Districts—Central Business District, Westshore District, and USF District—more livable and sustainable and to improve mobility. The City has also identified many of its major mixed-use corridors as transit emphasis corridors, which means they are conducive to transit.
- In Pinellas County, areas of higher densities and more commercial activity are found in and around downtown St. Petersburg and downtown Clearwater and along Gulf Boulevard. Additionally, the Greater Gateway area includes the county's largest employment base and most of the county's industrial land uses. The remainder of the county is primarily low-density residential development with strip commercial development along arterial roadways.
- Manatee County is predominately low-density commercial and residential in nature, with a few pockets of higher densities in Bradenton, Palmetto, and Anna Maria Island exhibiting high levels of transit orientation. The central Bradenton area consists of urban core and urban village land use designations that can be considered low-intensity and mixed-use zones. Future residential growth is expected to occur in Lakewood Ranch, Parrish, Ellenton, and along Moccasin Wallow Road.

Land Use Policy



Implications

TBARTA should focus on implementing service improvements, such as better frequency and later service, to the most productive regional routes in terms of ridership. These routes typically occur in mixed-use and downtown areas with more commercial activity.

Additionally, TBARTA should monitor changes in land use and developmental patterns as the more rural counties continue to develop to ensure that connections from growing residential areas to the major activity centers are provided.

3.1.4 Community Feedback

Many public involvement activities were conducted to gather input from the region’s residents and transit users on regional transit needs. These activities primarily included an online survey and a public outreach event in each county as well as obtaining open-ended comments from the public through TBARTA’s website or other means. A comprehensive marketing campaign was conducted to ensure that word about the survey opportunity reached throughout the region. From those that took the survey, participants live in 81% of the region’s ZIP codes.

This initial phase of outreach activities generated significant feedback on what the region’s residents need and would like to see for future transit enhancements. Several key items emerged, including:

- Most survey respondents (63%) had not taken transit in the last year and, of those that had, most are infrequent riders; however, most survey respondents (70%) are supportive of transit.
- Nearly 85% of respondents from the transit needs survey agreed that being able to travel around the five-county Tampa Bay region using convenient transit was important (or very important) to them.
- The number one reason cited by non-riders for not using transit was that it does not go where they need it to go.
- Approximately 77% of survey respondents said transit would be more beneficial to them if service was more frequent (e.g., every 30 minutes or less).
- Traveling to work, special event venues, and travel destinations such as hotels, airports/ports, etc.) were the top places where people would like to take transit in the Tampa Bay region.

The potential regional transit improvements identified, in part, from this initial phase of outreach will be brought back out to the public to help prioritize the most important regional transit strategies for inclusion in *Envision 2030*.

Community Feedback



Implications

Feedback from the community indicated interest in more transit options, preferably reliable and frequent service that will take them where they need to go. However, it is clear that for regional transit to be an option for more people living in Tampa Bay, service needs to be convenient and go where people need it. Integrating regional transit options into the existing network so people can more easily travel not only to work but to other key destinations such as special events and the beaches could make transit more attractive to “choice” riders. This would also provide more transportation options for tourists, which could help reduce congestion during peak-season travel.

How future regional transit service options integrate into the existing local systems from the user perspective will also be an important consideration for TBARTA.

3.1.5 Transit Technologies

Technology improvements that make transit services more efficient and convenient to use and operate are evolving and dynamic. These technologies include, but are not limited to, connected and autonomous vehicles, alternative fuels, and transit signal priority (TSP). As new technologies emerge and are employed, they have clear impacts on services being provided and the rider experience.

Transit services currently operating in the Tampa Bay region include fixed-route bus, trolley bus, FLEX/shuttle routes, Express/Limited Express bus, streetcar, and seasonal passenger ferry. Transit technologies already being used or that have been studied by the local transit agencies in the Tampa Bay region include the following:

- Transportation Network Companies (TNCs), such as Uber and Lyft, provide shared-ride services and operate throughout the region, with services more concentrated in the urban areas. TNCs are being more frequently integrated into transit service by providing first/last mile connections from fixed-route service. PSTA currently has the Direct Connect program that uses partnerships with Uber, United Taxi, and Wheelchair Transport to help transit users complete first/last mile trips from specific locations within the transit system.
- Several autonomous vehicle pilot projects are ongoing or planned or were recently completed by USF and HART.
- Currently, HART’s streetcar is the only rail service operated locally. Amtrak operates passenger rail services between New York and Miami with a stop at Union Station in downtown Tampa. No light rail, heavy rail, or commuter rail currently operates in the Tampa Bay region.
- Although HART’s MetroRapid line is referred to as BRT-lite, the Tampa Bay region currently does not operate any BRT services.

- HART, MCAT, and PSTA have mobile ticketing capabilities that offer riders a faster and easier boarding experience. The Flamingo Fare app is currently in the testing phase and will allow transit users to travel among Sarasota, Pinellas, Hillsborough, Pasco, and Hernando counties using a single fare. This option also allows the transit agencies to save on ticket printing costs and vending needs.
- In October 2019, TBARTA’s Board approved moving forward with a 12-month Innovative Transit Technologies Feasibility Study. This study will explore the technical, financial and regulatory issues of three transit technologies not operated in the region, including hyperloop, air taxis, and aerial gondolas.
- In 2013, HART and the USF’s Center for Urban Transportation Research (CUTR) deployed OneBusAway, a mobile app that provides real-time transit information. Since OneBusAway is open-source software, multiple transit agencies can be added to provide travelers with a single source of transit information for the region. This also reduces agency costs by sharing the same platform. As part of a 2017 study conducted for TBARTA, CUTR staff contacted the transit agencies operating within the region to determine the current state of each agency’s scheduling and automatic vehicle location (AVL) technology. This assessment provided an action plan with the next steps required to add other regional transit agencies to OneBusAway Tampa Bay. The transit agencies included in the study were TheBus, MCAT, PCPT, Polk County (Citrus Connection), Sarasota County Area Transit (SCAT), and Citrus County Transit. At the time the study was being completed, PSTA was already in the process of being added to the OneBusAway Tampa Bay.

Transit Technologies

Implications



As TBARTA’s role in providing regional transit services is further defined, the role that transit technologies could and should play will be a natural extension of that decision point. Although not currently a transit operator, TBARTA is steering the course to bring new transit technologies to the Tampa Bay region by leading the Regional Rapid Transit Study.

To facilitate continued coordination on this topic area, TBARTA should continue to monitor developments in technology that could be used to enhance existing or future regional transit services.

3.2 Funding

TBARTA revenues are primarily from Federal and State funding sources to provide commuter services and support regional transit planning. It has the power to issue bonds; however, its role in funding and implementation of regional projects is evolving. Upon completion of *Envision 2030*, TBARTA will be eligible to receive Public Transportation Block Grant funds from FDOT. TBARTA’s FY 2020 operating budget is \$7.5 million, and its capital budget is \$139,000.

The regional peer review conducted as part of *Envision 2030* revealed that the operating and capital budgets for the six selected peer regional agencies are all significantly greater than TBARTA’s. These agencies also all operate, either directly or through contracts, fixed-route bus services and/or rail services and are funded by a combination of Federal, State, and local sources, including sales tax, motor vehicle excise taxes, property taxes, etc. Each peer agency has some form of dedicated local or State funding that is used to operate transit services in their respective region.

Funding

Implications



Should TBARTA seek to expand its services and provide regional transit services in the form of fixed-route, TD, or a combination thereof, funding will need to increase significantly. Key questions related to funding include whether TBARTA will pursue a dedicated funding source and what TBARTA’s role may be as a designated Federal and State grant recipient. The peer regional agency review showed there is a range in how this role is approached. One option is that TBARTA serve as the sole recipient in the region for all (or most) Federal and State grants and then pass those funds through to the local agencies. The other option is that TBARTA and the local agencies remain individual recipients; however, for some discretionary grant programs, this can create additional competition within the region.

The need for local revenue sources will be driven largely by whether TBARTA operates service. Although new improvements do not necessarily have to be funded completely by local funding sources, local sources are typically needed to leverage Federal and State grant funds.

3.3 Operations

3.3.1 Transit Operations

TBARTA oversees the FDOT District 7 Commuter Services program, which provides the following services:

- **Regional Vanpool program**, which serves commuters in Hernando, Hillsborough, Citrus, Pasco and Pinellas counties.
- **Emergency Ride Home** program, which provides commuters (employees and college students) with a guarantee ride home when unforeseen circumstances arise. Users must register and are eligible for up to four free taxi rides from work or school if they commute using means other than driving alone at least two times a week.
- **Carpool** programs and resources, such as the RideHome match program and Emergency Ride Home program.
- **Telecommuting** solutions for employees and employers. Links to local transit agencies are also provided on TBARTA’s Transit & Telecommute webpage.

- **School Pool program**, which provides carpooling benefits for parents and students. Schools voluntarily participate through an agreement between the School District, school principal, and TBARTA. The program is currently available to parents at selected elementary, middle, and high schools in Hillsborough and Pinellas counties.
- **Bikepool**, a free service that matches bicycle commuters with one another and provides eligible regular bicycle commuters with the Emergency Ride Home program.
- **Park and Ride** resources, including a list of the current facilities located throughout the region.

Although TBARTA does not currently operate transit services, it does coordinate with the five local transit agencies on various transportation issues, grant opportunities, and studies. The following is an overview of the local transit operations:

- **Hernando County (TheBus)** – The Transit Division is included in Hernando County’s Planning Department, which oversees the County’s transit system in conjunction with private provider RATPDev. The Transit Division coordinates the provisions of two types of public transportation—fixed-route and demand-response paratransit service. TheBus also has a route connecting to services in Pasco County.
- **Hillsborough Area Regional Transit Authority (HART)** – HART is the entity responsible for providing public transportation in Hillsborough County and operates local, express, and limited express fixed-route service in addition to paratransit and streetcar services. HART also has connections to PCPT and PSTA transit routes.
- **Pasco County Public Transportation (PCPT)** – PCPT operates under the direction of the Pasco County Board of County Commissioners as part of the County’s Public Services Department and provides fixed-route and paratransit services to Pasco County residents. PCPT also connects with services in Hernando, Hillsborough, and Pinellas counties.
- **Pinellas Suncoast Transit Authority (PSTA)** – PSTA provides public transportation for Pinellas County, in addition to regional services to Hillsborough, Pasco, and Manatee counties. The agency operates local, express, regional express, and trolley fixed-route services as well as paratransit service.
- **Manatee County Area Transit (MCAT)** – MCAT operates as part of the Manatee County Public Works Department. Services include fixed-route and paratransit bus service and complementary services for TD persons. MCAT also has service connections with PSTA and Sarasota County’s fixed-route services.

3.3.2 Organizational Attributes

As noted, TBARTA currently operates the Commuter Services Program to assist the region’s residents and employers in identifying alternatives to driving alone to and from work and school. However, the “TBARTA Act” gives TBARTA the authority to plan, develop, construct, and operate public transit projects that are intended to address the region’s critical transportation needs or concerns. The future role that

TBARTA may play in the region will have a direct effect on the agency organizational structure in terms of the number and expertise of staff.

Currently, TBARTA has an Executive Director and 12 staff. As shown in Table 3-1, this is comparable to the Atlanta-Region Transit Link (ATL) Authority and the San Diego Association of Governments (SANDAG). Both agencies administer (or, in the case of ATL, will administer) funds to transit operators in their respective region. As shown, if TBARTA operates regional transit services in the future, the number of staff will need to increase significantly (particularly if TBARTA acts as a direct operator and does not contract service out to a local agency and/or private party).

Table 3-1: Peer Regional Agency Staffing Levels

Agency	Region	Operate Service?	Current # of Staff
TBARTA	Tampa Bay	Commuter Services	12
ATL (budgeted)	Atlanta	Not yet	9
SANDAG (TransNet and Commuter Services programs only) ¹	San Diego	Commuter Services	23
South Florida Regional Transportation Authority (SFRTA)	South Florida	Yes, contracts out	130
Valley Metro	Phoenix	Yes, contracts out	376
Sound Transit	Seattle	Yes, contracts out	1,186
Metropolitan Council (Transportation Division only) ²	Minneapolis/St. Paul	Yes, directly	3,525

Sources: Agency budgets or other staffing information provided.

¹ SANDAG serves as the MPO for the San Diego region and oversees the region's commuter services program and administers the TransNet sales tax program, a percentage of which is used to fund transit projects in the region. Staffing numbers in this table reflect the positions for these two programs. There are 383 staff positions in the entire agency.

² Metropolitan Council serves as the MPO for the Minneapolis-St. Paul region. The Council's Transportation Division operates, administers, and coordinates public transit services in the region. There are 4,575 staff positions in the entire agency.

Similar to the other regional peer agencies, TBARTA's governing board is made up of elected officials, gubernatorial and local independent transit agency appointments, the mayors of the two largest cities in the region (Tampa and St. Petersburg), and the Secretaries of FDOT Districts 1 and 7.

Operations

Implications



A critical decision point for TBARTA is its future role in operating regional transit service in the Tampa Bay region. Several regional agencies reviewed in the peer analysis operate regional transit service that complement local services provided by other agencies in the area. For those that operate service, it was observed that this integration of services and providing the rider with a “seamless” experience through a single phone application and regional fare policy across all services was at the core of the region’s success with transit.

TBARTA should continue to work closely with the local transit agencies and other public entities to identify regional solutions to critical transportation needs. This is particularly important if discussions of TBARTA’s future role as an operator continue. What services TBARTA may operate, how those services are defined, and how regional services will integrate with the local systems are all critical decision points going forward.

3.4 Image

TBARTA currently has a brand for the agency and for its Commuter Services Program. Local transit agencies within the region each have their own unique brand and identity that is used for both local and any regional or inter-county services the agency provides. Should TBARTA move forward with operating regional service in the future, decisions about how that service should be branded and how that brand should be integrated with those of existing agencies will need to be discussed. The peer regional agency review revealed that there are three primary branding considerations related to whether TBARTA operates regional transit services in the future:

- Completely unified branding of all transit in the region, where all transit services operate under one look/brand (even if service is operated by different agencies)
- Co-branding, where both a regional and local brand are prominent
- Separate branding for regional vs local transit services

When there are multiple operators, transit system branding is important for customers, as it can lead to understanding what services are being provided (i.e., buses showing a regional agency brand indicate longer, inter-county routes) and can help facilitate regional fare collection for local agencies in Tampa Bay (Flamingo Fare).

Image/Branding



Implications

Should TBARTA move forward with operating regional service in the future, decisions about how this service should be branded and how that brand is integrated with those of existing agencies will need to be discussed.

When multiple transit agencies are operating in the same area, transit system branding is important for customers, as it can lead to a better understanding of what services are being provided (i.e., buses showing the regional agency's brand indicate longer, inter-county routes vs. a local system with a different brand). Cohesive branding can also help facilitate regional fare collection that local agencies in Tampa Bay have started to model (Flamingo Fare).

Image/branding can also play an important role in gathering support by regional residents related to funding services with local taxes. A more unified branding approach may present a more robust system for potential voter-approved funding compared to the same services provided by multiple single-branded agencies.