



Post Referendum Analysis, Phase III

Interagency Working Group
9/21/2012



Today's Meeting

- ✓ Key messages from Best Practices research
- ✓ Lower cost "Hybrid Rail" concept
- ✓ Survey Results



Recap – Best Practices Research

National Trends (2000-2011)

- All referenda: 344 total – **70% passed**
- Sales tax referenda: 141 total – **58% passed**
 - <0.50% sales tax: 74 total – **65% passed**
 - 0.50-0.99% sales tax: 54 total – **56% passed**
 - 1% sales tax: 10 total – **40% passed***


Researched 23 examples of successful transportation referenda, focusing on:

- Project selection
- Accountability
- Public information

**Of 4 that passed, 1 had mix of transit, road, community projects; 1 dedicated 10% of revenues to transit; 1 funded a transit center (among other infrastructure projects); and 1 was vetoed by the Wisconsin Governor*




Lower Cost Transit Project "Hybrid Rail" Concept




Lower Cost Transit Projects "Hybrid Rail" Concept


- **Modern self-propelled vehicles**
 - No overhead wires
 - Not much larger than LRT
 - Nimble turning & acceleration
- **Reuse existing tracks**
 - Little right-of-way needed
 - Freight trains run at night, passenger during day
 - Solidly built vehicles per FRA
- **Lower frequency service**
 - Focus on rush hours to reduce operating costs




Austin, TX
\$5M/mile




Denton, TX



San Diego, CA
\$20M/mile

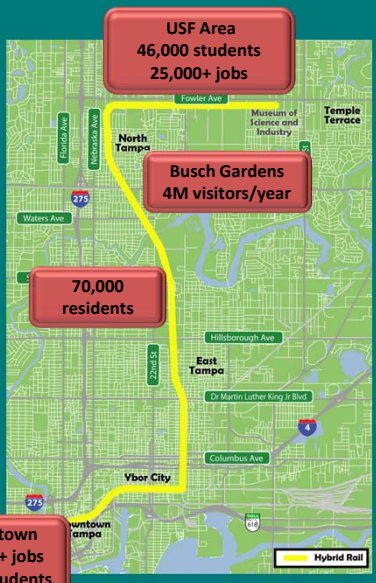


Trenton/Camden, NJ



Lower Cost Transit Projects "Hybrid Rail" Concept

- **Reuse existing rail corridor**
 - Requires agreement with CSX
 - Could be operational sooner than Light Rail
 - Requires FRA waiver to use lighter vehicles on freight tracks
- **Cost to build (high level, very preliminary):**
 - Light Rail: \$862 M
 - Hybrid Rail: \$157-\$393 M




USF Area
46,000 students
25,000+ jobs

Busch Gardens
4M visitors/year


70,000 residents

Downtown
50,000+ jobs
6,000 students



Lower Cost Transit Projects "Hybrid Rail" Concept


- **Travel Times, USF to Downtown Tampa**
 - Driving at average congested speed: 31 min.
 - Hybrid rail, with 9 stops: 25-26 min.
 - Cost to build: \$158M
 - Hybrid rail, with 9 stops, double track: 24 min.
 - Additional \$173M to build
 - Hybrid rail, with 13 stops: 30-31 min.
 - Cost to build: \$278M
 - Hybrid rail, with 13 stops, double track: 28 min.
 - Additional \$115M to build



Lower Cost Transit Projects "Hybrid Rail" Concept

- **Hybrid Rail Operating Costs**
 - Cost of fuel affects hybrid rail operating expense
 - **15 min. peak/30 min. mid-day: \$13.9M/year***
double-track, **\$20.1M/year*** single-track
 - **30 min. peak/60 min. mid-day: \$7.9M/year***
double or single-track
 - **"Bare bones service" (30/60 or no mid-day):**
could reduce costs further
- **Light Rail Operating Costs**
 - 10 min. peak/15 min. mid-day: **\$15.1M/year**

* Assumes 9 stations




Lower Cost Transit Projects

"Hybrid Rail" Concept

	Capital Costs (per mile)	O&M Costs (per year)
Light Rail (in 2035 LRTP)	\$62.4 M	\$15.1 M
Hybrid Rail	\$13 - 29 M	\$7.9 – 20.1 M

- **Capital costs include:**
 - Right-of-way for additional passing tracks
 - Laying new rail tracks (approximately 2.5 miles)
 - Stations
 - Vehicles
 - Systems (signals, communication, fare collection)
 - Parking
 - Sitework
 - Resurfacing near crossings
- **Operating and maintenance costs include:**
 - Labor and staff
 - Fuel to run vehicles
 - Maintenance of tracks and stations
 - Maintenance of vehicles

O&M costs are calculated as a factor of revenue train-hours



Lower Cost Transit Projects

"Hybrid Rail" Concept

- **Costs do NOT include:**
 - Maintenance facility
 - 2035 Plan assumed \$30 million for a typical maintenance facility
 - Negotiations with CSX and businesses along rail line
 - FDOT purchased the 61.5 miles SunRail tracks for **\$150 million** (\$2.4M/mile)
 - A second agreement between FDOT and CSX for an additional **\$282 million** included:
 - Improvements to S-Line (to mitigate impact on communities, improve freight delivery and capacity)
 - Road improvements around Integrated Logistics Center (ILC)
 - Relocation of freight traffic from Taft Yard to new ILC



Statistically Significant Telephone Survey



Survey Objectives

- Gather data on Hillsborough County voters' attitudes and perception of:
 - Traffic and transportation
 - Preferred project types and priorities
 - Potential funding options for local transportation improvements



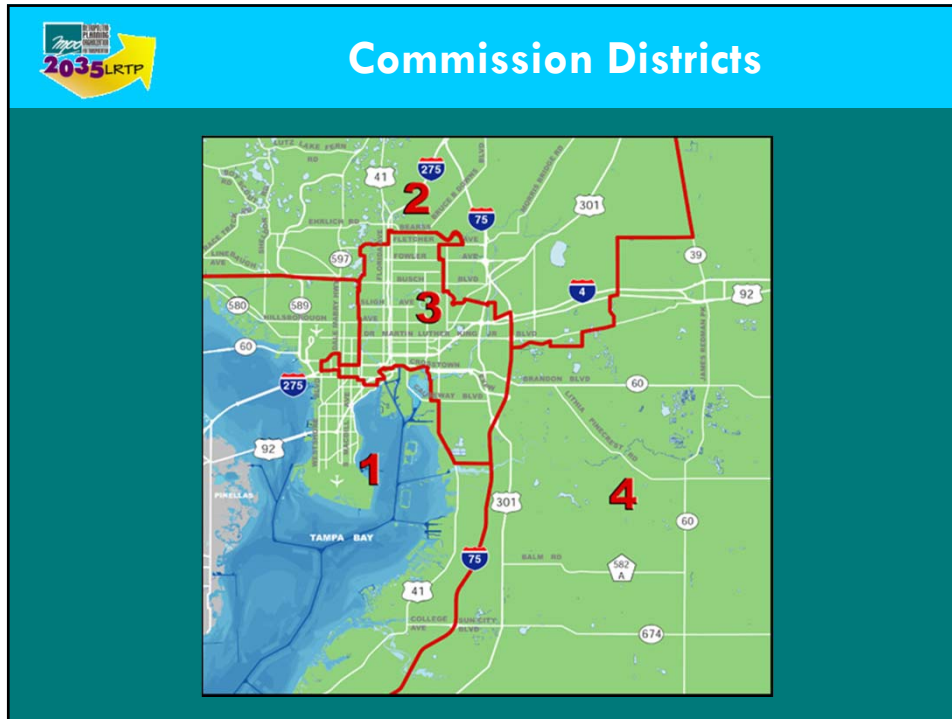
Phase Two Focus Groups (Recap)

- Conducted in March 2012
- Hillsborough County voters
- Grouped by geography
- Emphasized transportation priorities and funding options
- **Key findings:**
 - Traffic congestion and lack of transportation options is serious problem
 - Preferred smaller-scale, incremental improvements to large-scale multi-corridor improvements
 - Preferred broad-based funding options (e.g., sales tax) to narrow, targeted options (e.g., impact fees, utility tax)
 - Obstacles to building consensus include: modal preferences, economic concerns, lack of trust in local government



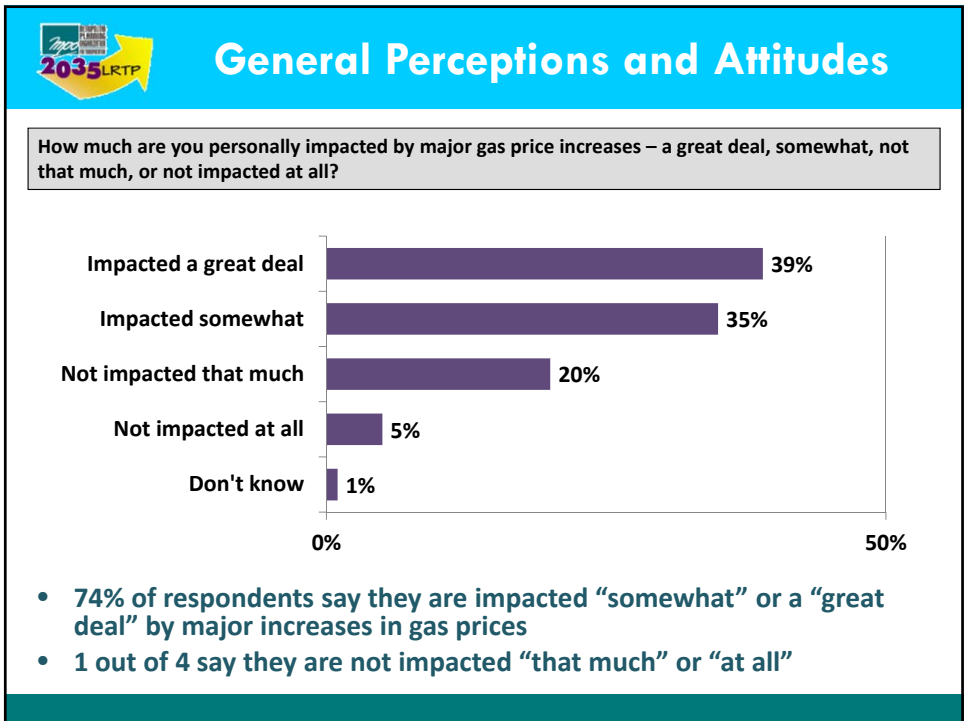
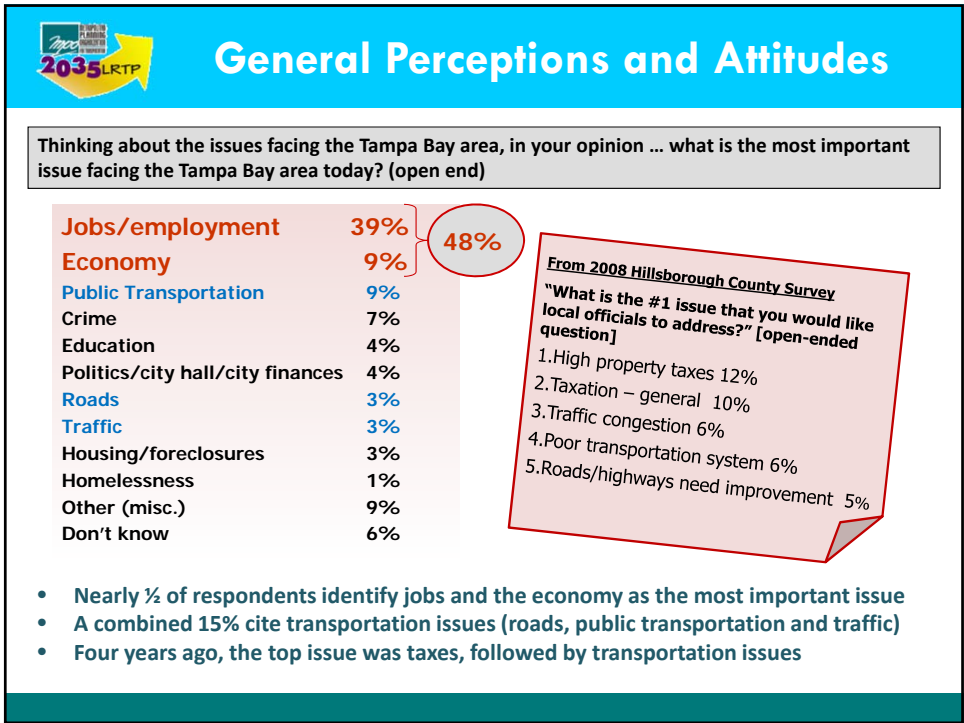
Telephone Survey: Methodology


- Conducted July 31-August 5, 2012
- 806 active-status voters in Hillsborough County
- Sample distributed according to County Commission voting populations
 - Oversample of 100 interviews with City of Tampa residents
 - Balanced to reflect county's gender, registered political party affiliation
- Margin of error:
 - Topline, district-wide results have $\pm 3.7\%$ margin of sampling error, at 95% confidence level
 - Results by district have a $\pm 6\%$ margin of sampling error



General Perceptions and Attitudes

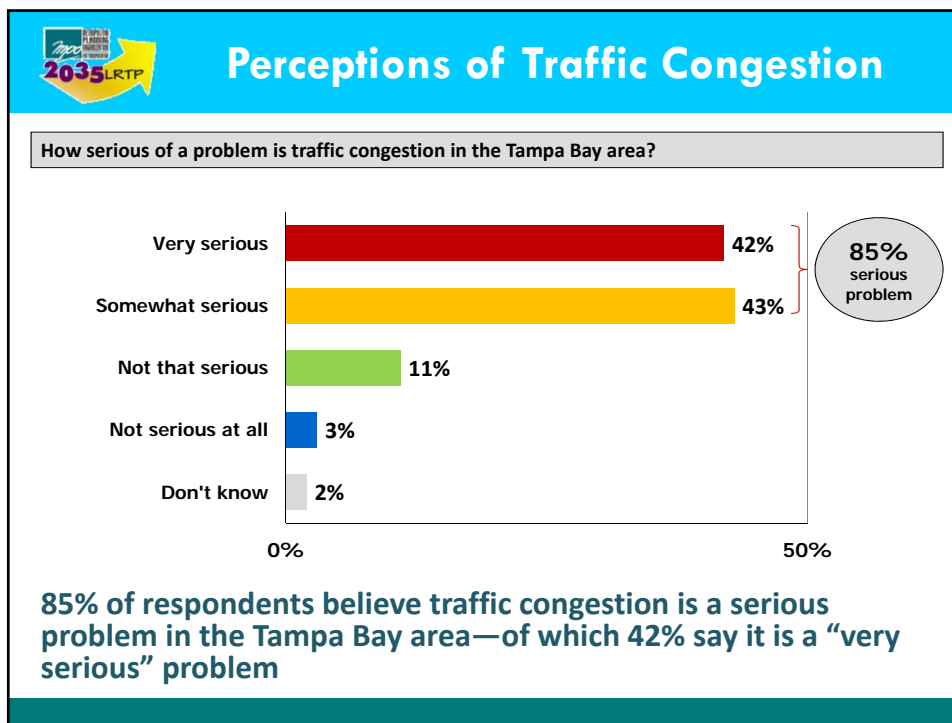
- Key findings:
 - Economy and jobs remain the dominant "top-of-mind" issues of concern
 - Followed by a combination of transportation issues
 - Perception of traffic congestion is negative across the board, in all areas of the county and across all demographics
 - 3 out of 4 respondents say they are impacted by major increases in gas prices

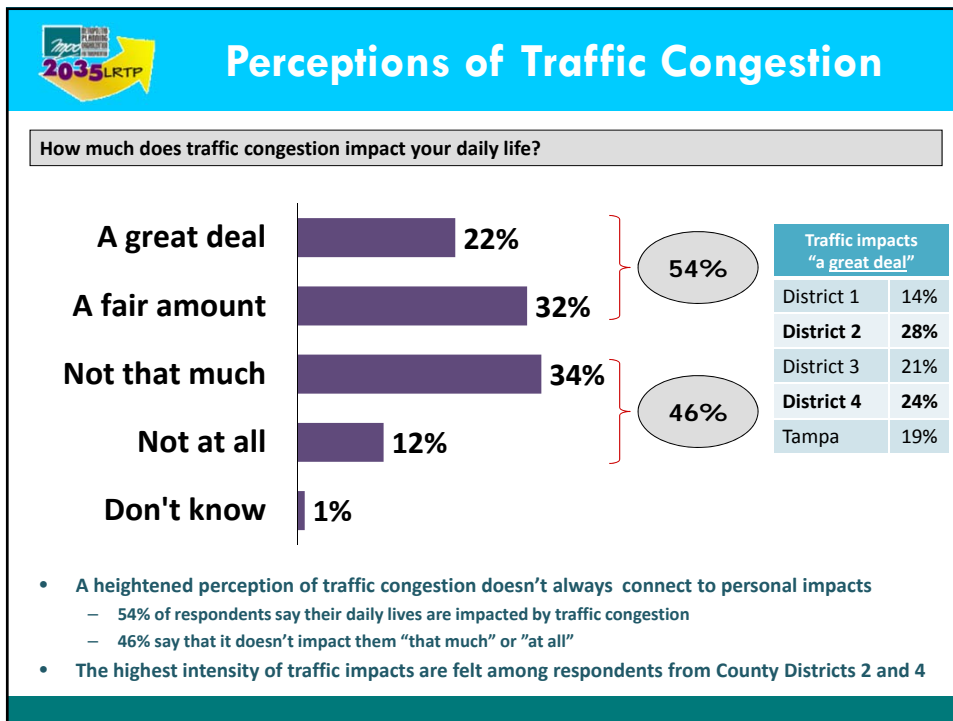
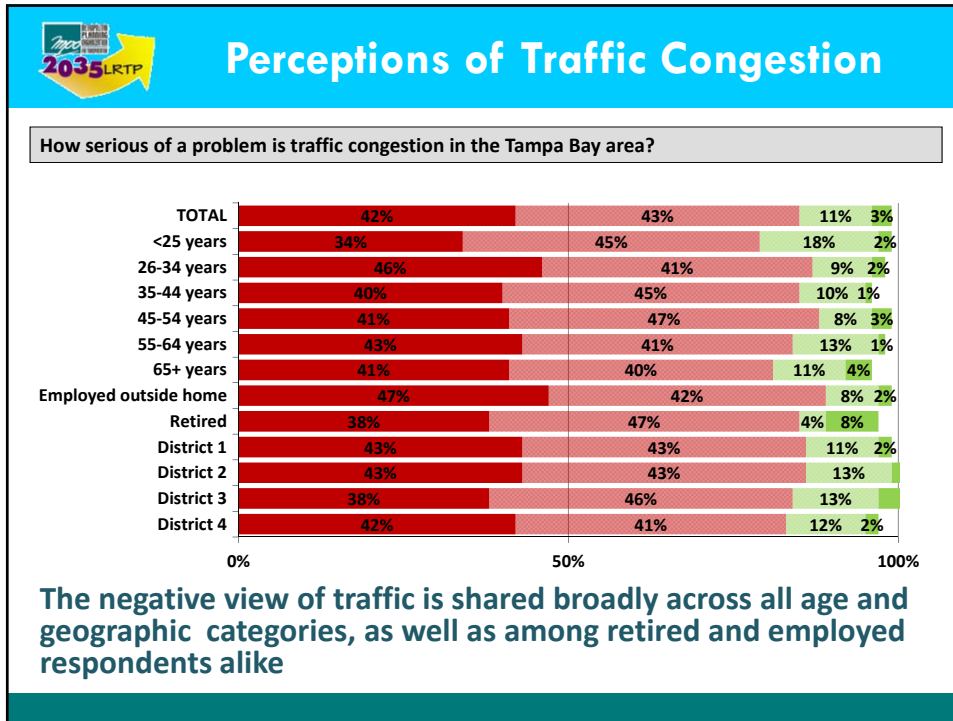


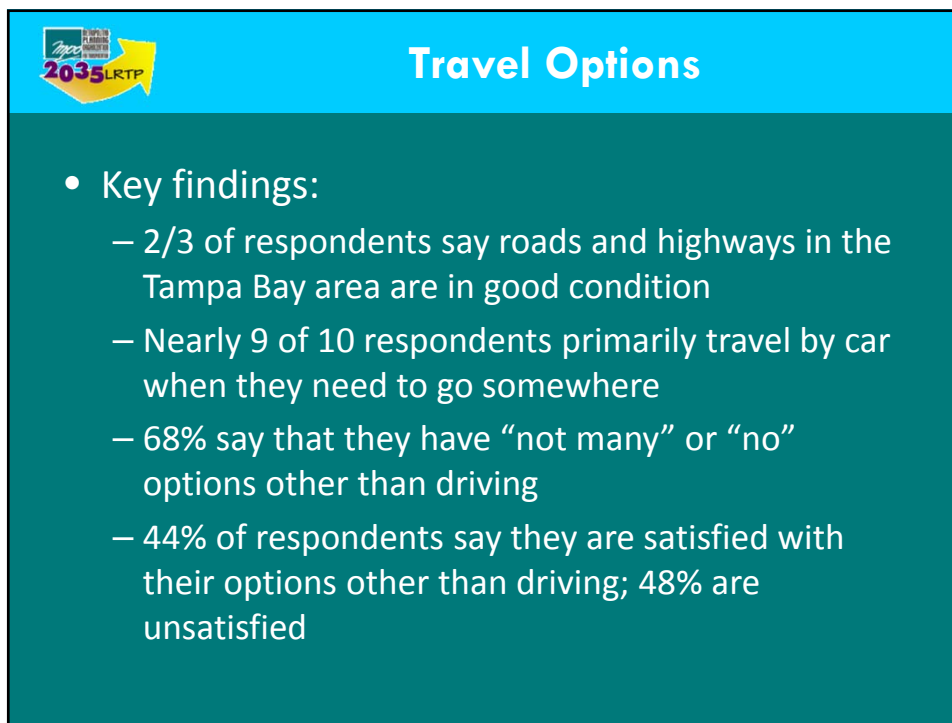
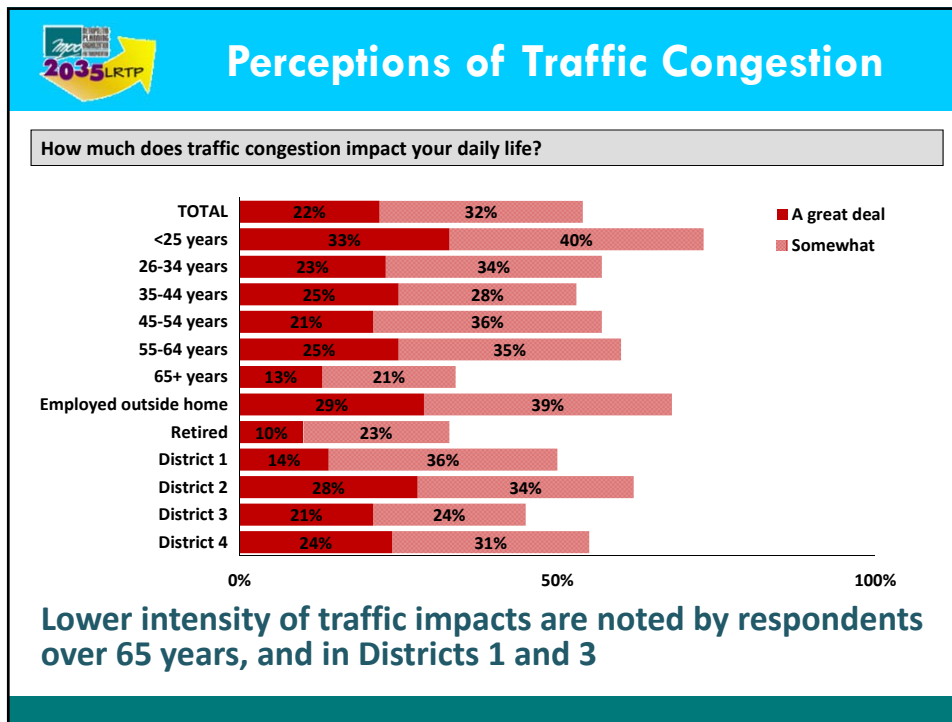


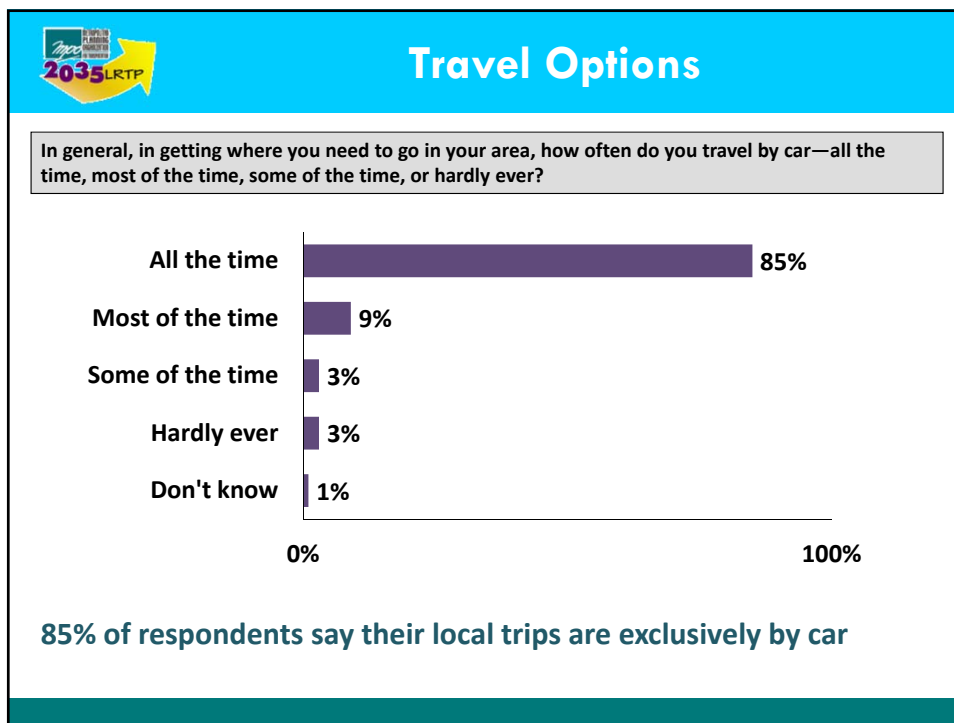
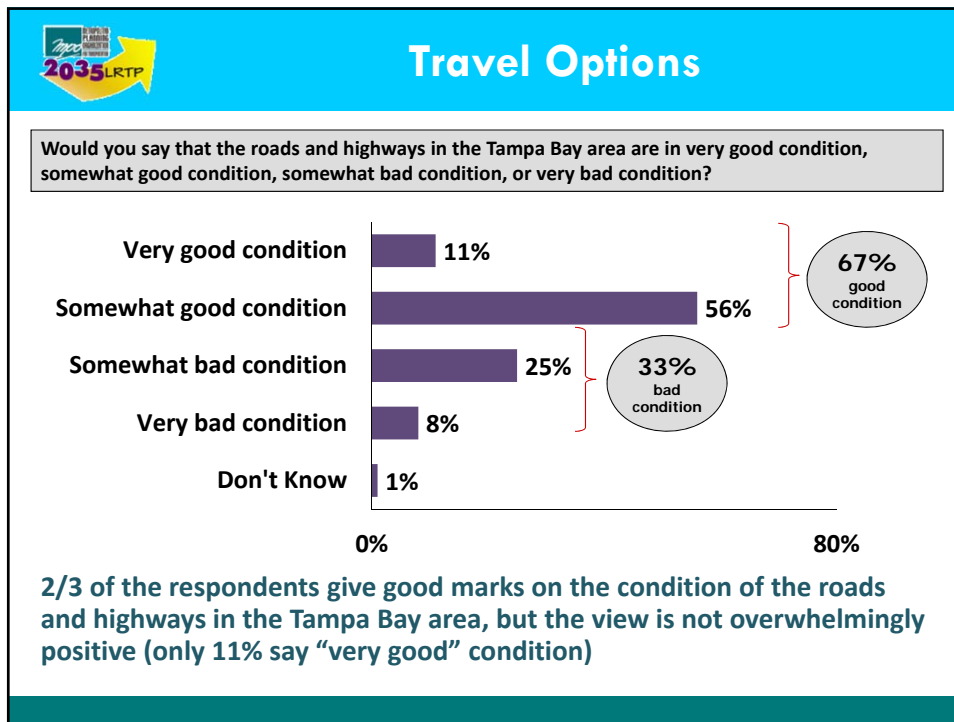
Perceptions of Traffic Congestion

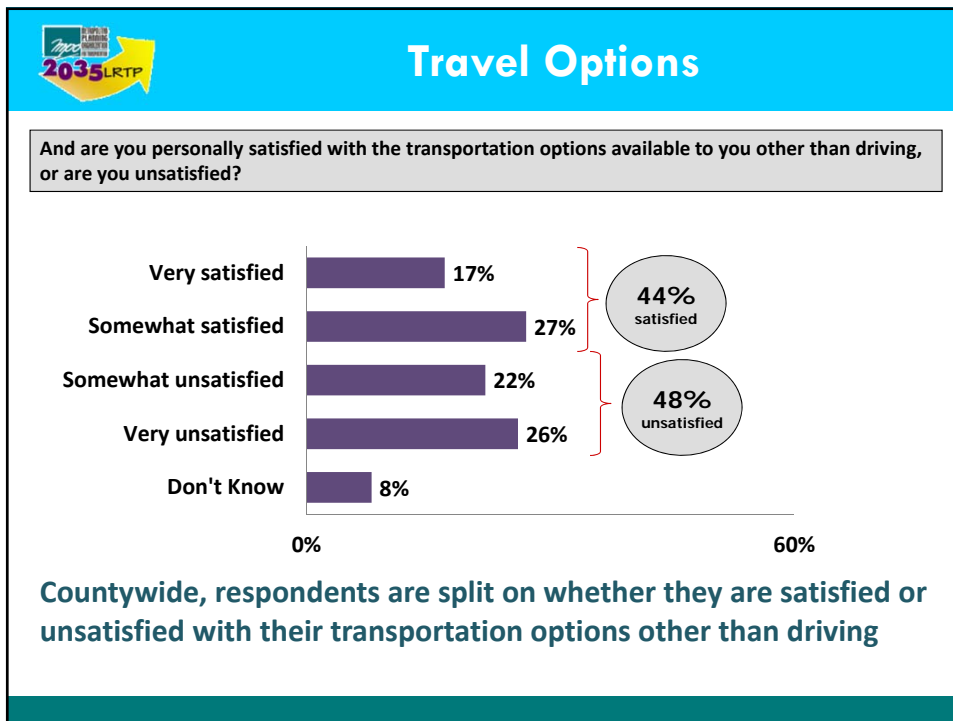
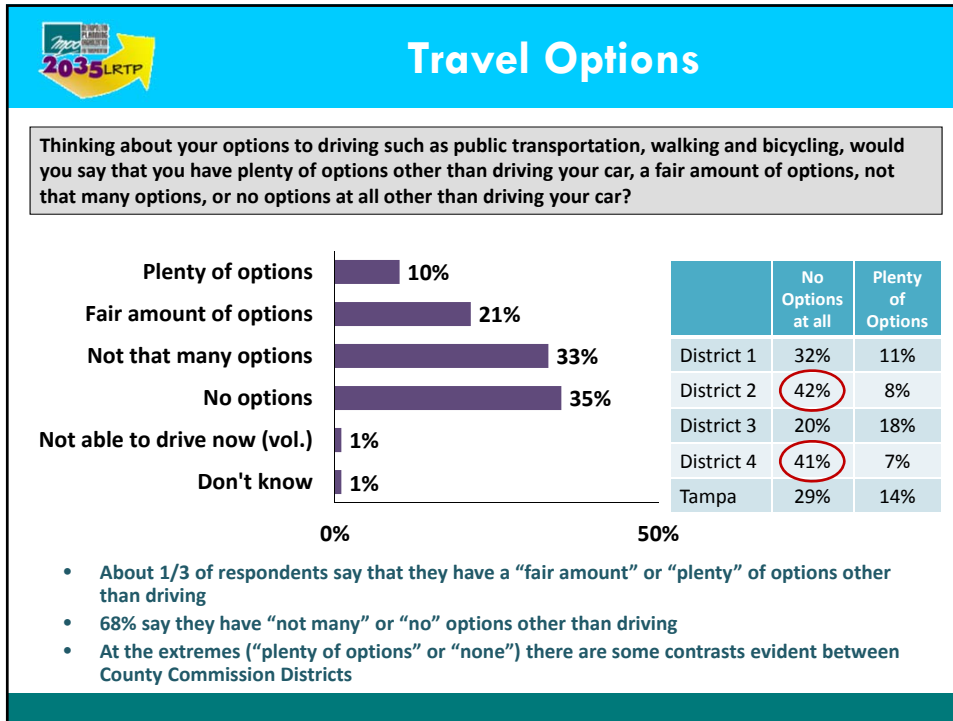
- Key findings:
 - 85% of respondents say traffic congestion is a serious problem
 - 42% say it is a “very serious” problem
 - Highly negative perceptions of traffic congestion are constant across geographic and age demographics
 - There are significant contrasts in how people perceive traffic’s impacts on their daily lives
 - Many respondents who think that traffic is a serious problem also say that it just doesn’t impact their lives very much















Options and Priorities

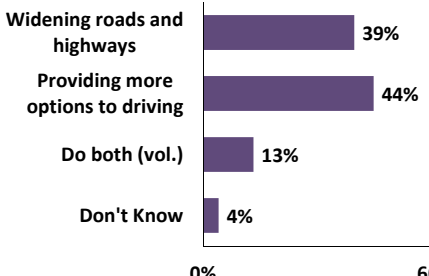
- Key findings:
 - The top priority improvements to reduce delays from congestion are car-related:
 - Maintaining roads and highways
 - Making improvements to intersections (e.g., turn lanes, light signal improvements)
 - Next priorities are expanding local bus service and adding pedestrian connections
 - “Third tier” priorities include rail transit and tolled highway lanes
 - Messages about rail transit using existing tracks to save on costs, and the potential to expand a demonstration line to serve other areas, do increase the perceived level of priority



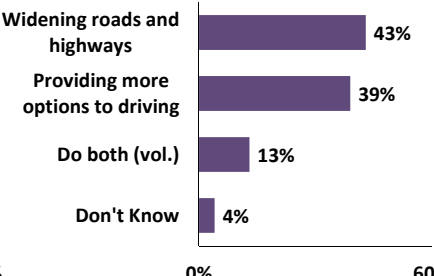
Options

VERSION A: “Right now, which ONE of the following do you think should be the top priority for IMPROVING TRANSPORTATION in the Tampa Bay area?”

VERSION B: “Right now, which ONE of the following do you think should be the top priority for RELIEVING TRAFFIC CONGESTION in the Tampa Bay area?”




Option	Percentage
Widening roads and highways	39%
Providing more options to driving	44%
Do both (vol.)	13%
Don't Know	4%




Option	Percentage
Widening roads and highways	43%
Providing more options to driving	39%
Do both (vol.)	13%
Don't Know	4%

- As a strategy to improve transportation, “Providing options to driving” gets a more positive response than “widening roads”
- But to relieve traffic congestion, “widening roads and highways” gets a more positive response than “providing options to driving”




Priorities

[RANDOM ROTATE STATEMENTS] Ranked by highest priority ratings	Very high	Somewhat at high	NET HIGH PRIORITY	Somewhat at low	Very low	NET LOW PRIORITY
Maintain streets, roads, bridges and highways to keep them in good condition	80%	16%	96%	2%	2%	4%
Add turn lanes and traffic signal improvements to reduce delays at congested intersections	61%	25%	86%	7%	5%	12%
Expand local bus service so it runs more often than once an hour and on evenings and weekends (half sample)	53%	31%	84%	8%	5%	13%
Add new sidewalks, crosswalks and safer pedestrian connections	52%	31%	83%	9%	7%	16%
Restore recent cuts to local bus service so it runs more often than once an hour and evenings and weekends (half sample)	55%	23%	78%	10%	9%	19%
Run circulator shuttle buses in your area with service to schools, shopping and medical centers	40%	35%	75%	13%	10%	23%




Priorities

[RANDOM ROTATE STATEMENTS] Ranked by highest priority ratings	Very high	Somewhat at high	NET HIGH PRIORITY	Somewhat at low	Very low	NET LOW PRIORITY
Add more express bus routes	36%	35%	71%	13%	11%	24%
Extend the downtown streetcar line to provide more connections between jobs and neighborhoods	36%	28%	64%	16%	17%	33%
Add more bicycle lanes and trails	31%	32%	63%	20%	16%	36%
Build a rapid bus system in a special lane on Interstate 275 between downtown Tampa and the Tampa airport	35%	26%	61%	17%	20%	37%
Improve railroad crossings and build overpasses to reduce traffic delays caused by freight trains	35%	25%	60%	20%	18%	38%
Add one demonstration light rail or commuter rail line to a major employment center	36%	23%	59%	16%	22%	38%



Priorities

[RANDOM ROTATE STATEMENTS] Ranked by highest priority ratings	Very high	Somewhat at high	NET HIGH PRIORITY	Somewhat at low	Very low	NET LOW PRIORITY
Build a demonstration commuter rail line that connects downtown Tampa and the Tampa airport	33%	23%	56%	18%	22%	40%
Build a demonstration commuter rail line that connects downtown Tampa and the USF campus	29%	27%	56%	18%	23%	41%
Add new express lanes with tolls on major roads and highways	20%	27%	47%	20%	32%	52%
Add water ferry service to connect key waterfront areas of Tampa Bay	20%	24%	44%	21%	30%	51%




Priorities

What if I told you that to save on costs, the demonstration rail line would run on existing but under-used freight train tracks? Would that information make a demonstration rail line a high priority or a low priority?					
Very high	Somewhat high	NET HIGH PRIORITY	Somewhat low	Very low	NET LOW PRIORITY
36%	32%	67%	12%	17%	29%

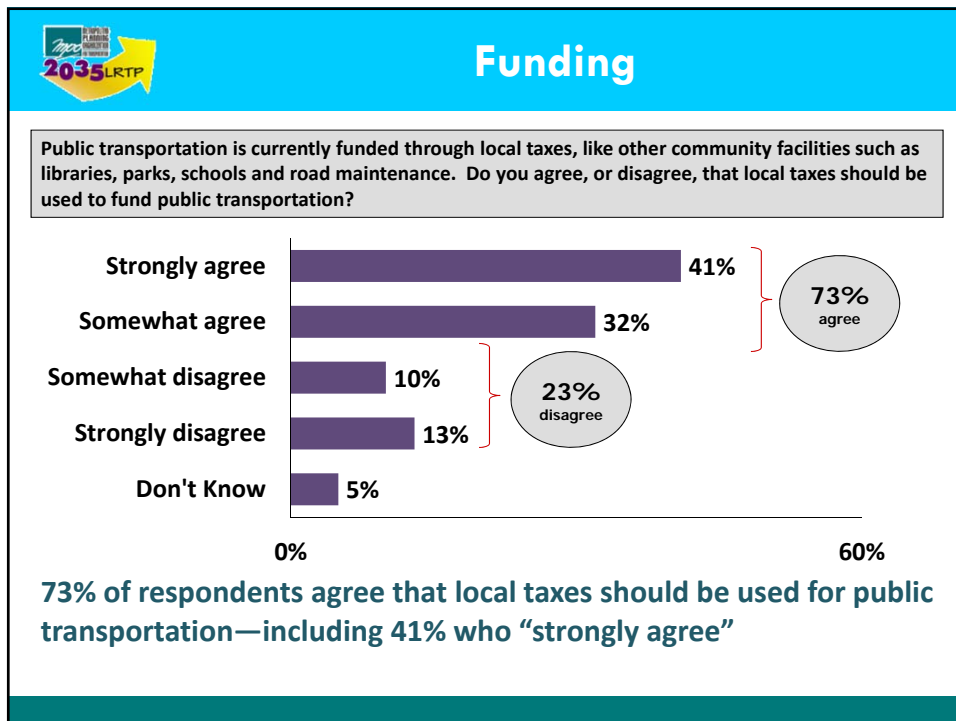
What if I told you that the demonstration rail line that uses existing tracks could be extended in the future to serve other major destinations in Hillsborough County and neighboring counties. Would that information make a demonstration rail line a high priority or a low priority?					
Very high	Somewhat high	NET HIGH PRIORITY	Somewhat low	Very low	NET LOW PRIORITY
40%	29%	69%	11%	17%	28%

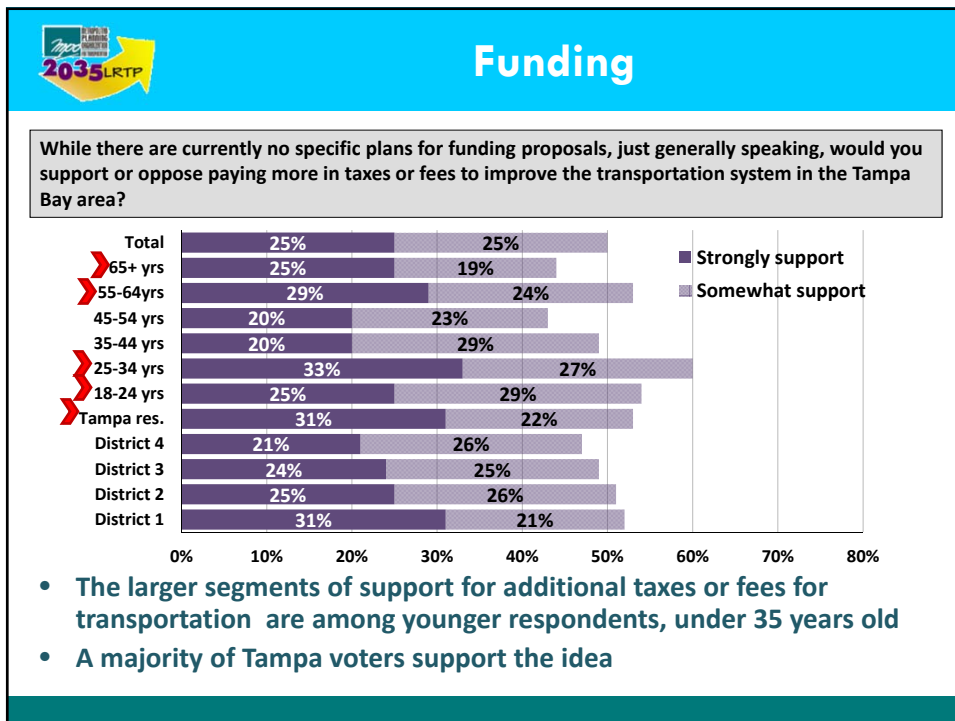
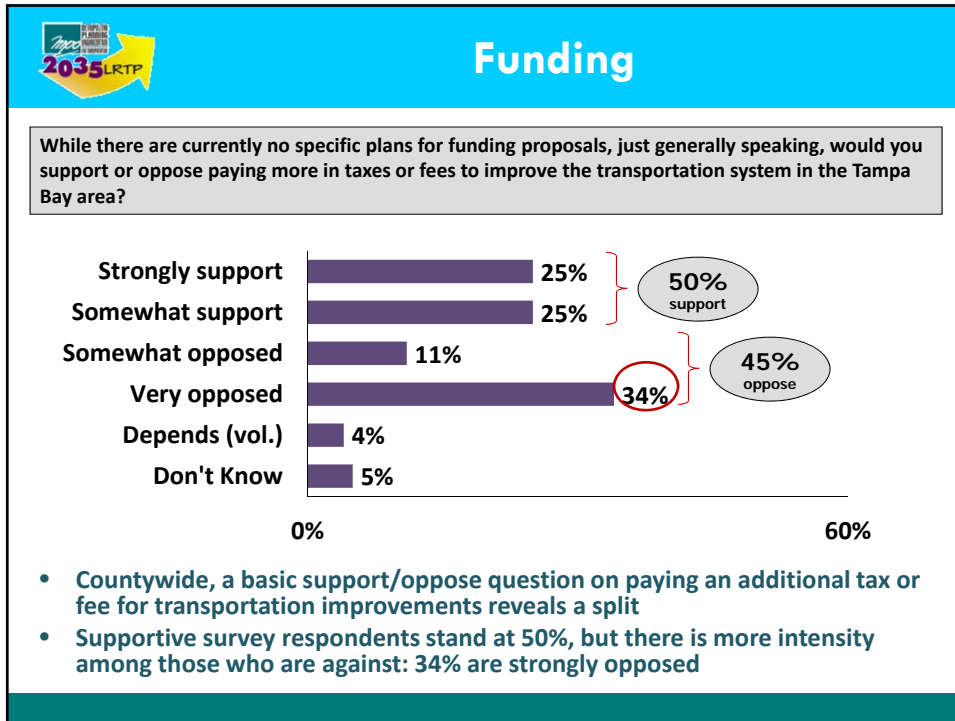
Explaining that rail transit could use existing tracks boosts support, as does the suggestion that it could be expanded to serve other regional destinations

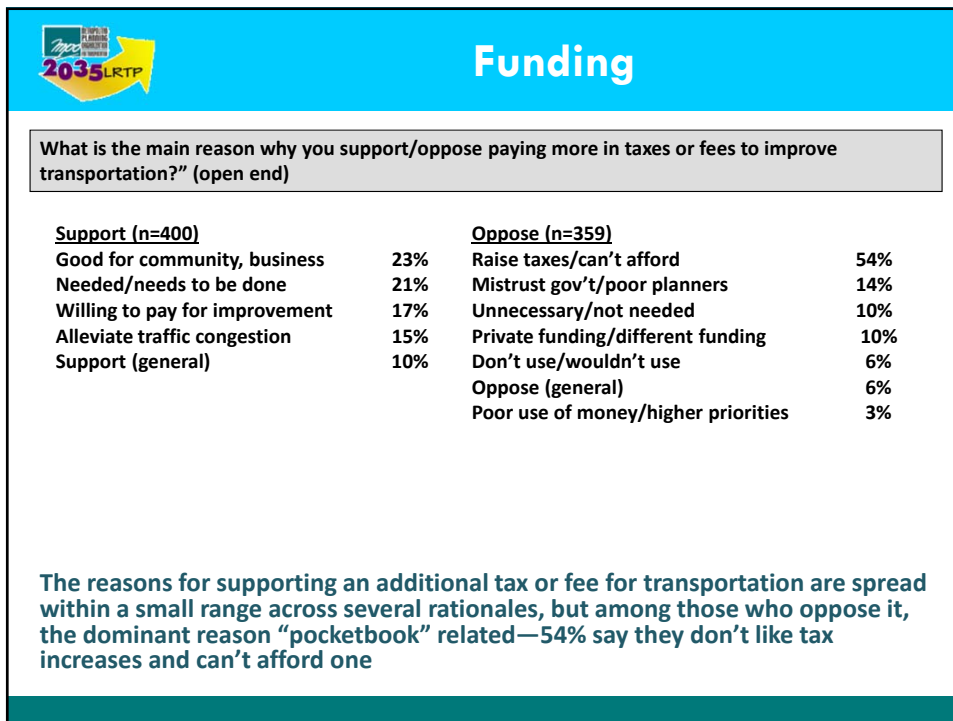
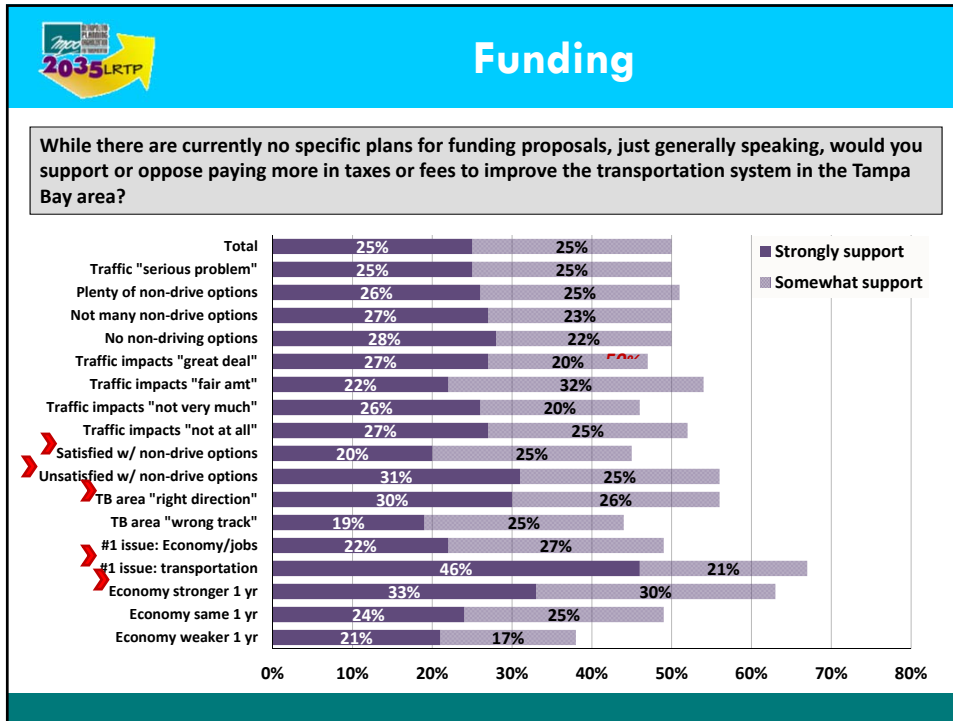



Funding

- Key findings:
 - 3 out of 4 respondents agree with the basic premise that local taxes should be used to support the public transportation system
 - 50% of respondents say they would support a conceptual proposal to increase taxes or fees to support transportation improvements
 - 45% say they would oppose such a proposal
 - A majority (53%) of respondents who live in the City of Tampa say they would support a tax or fee ballot measure for transportation
 - Support is at 48% among county residents who do not live in Tampa
 - Younger respondents (34 years or less), have a more optimistic view on the local economy, and say transportation as their top local issue of concern are more likely to say they would support a transportation ballot measure










Funding Options

- Key findings:
 - Countywide, among several funding several options for transportation, two reach a 50% level of support:
 - ½-cent sales tax (57% of respondents indicate they would support)
 - \$50/yr property tax (50% support)
 - Among Tampa respondents, three options reach 50-plus percent support levels:
 - ½-cent sales tax (59% of Tampa respondents)
 - \$50/year property tax (52%)
 - 1-cent sales tax (50%)
 - Countywide, on the sales tax revenue option, there is very little pick-up (movement from “oppose” to “support”) if the amount is lowered to ½-cent



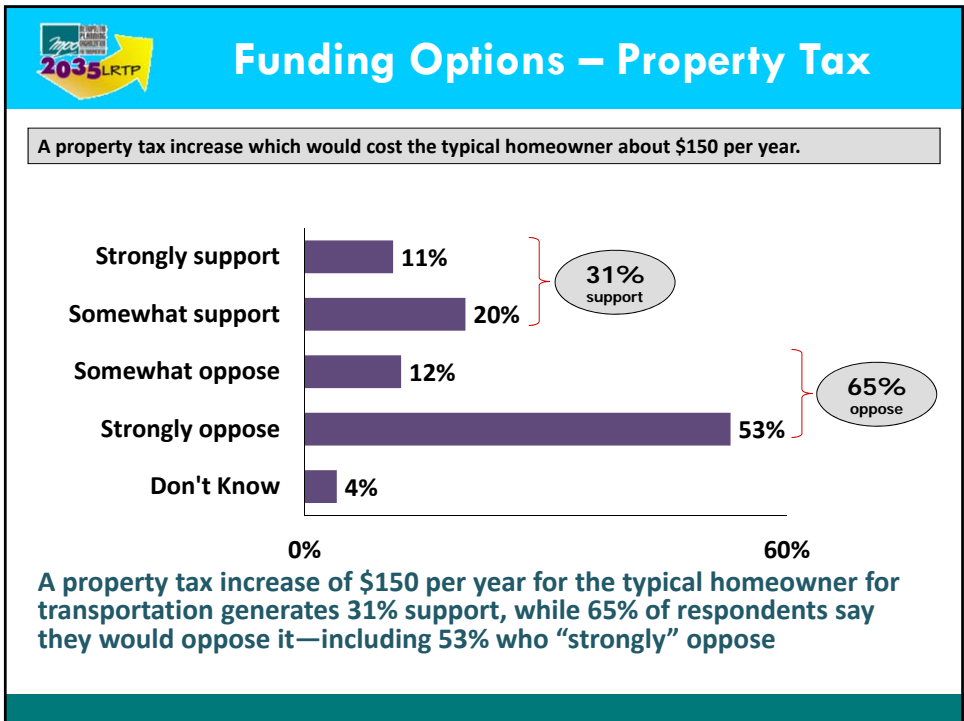
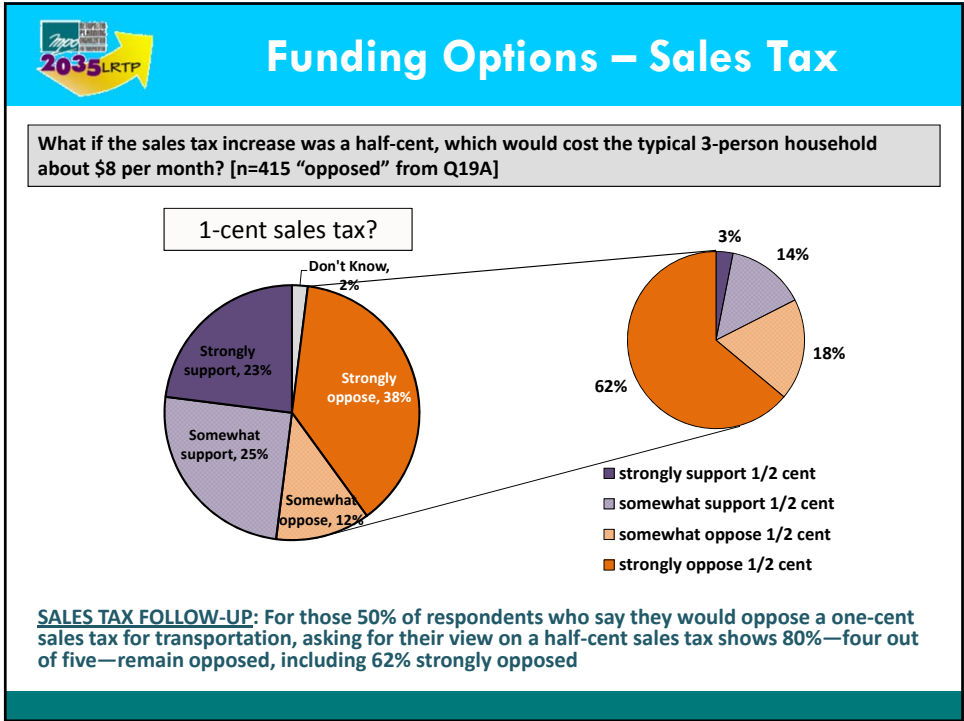
Funding Options – Sales Tax

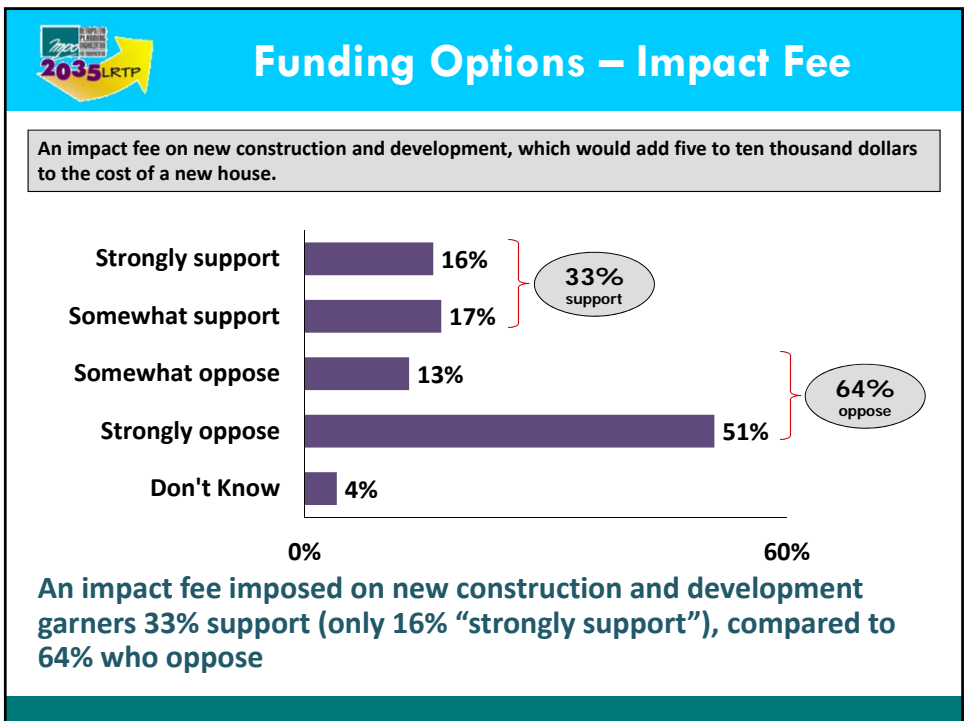
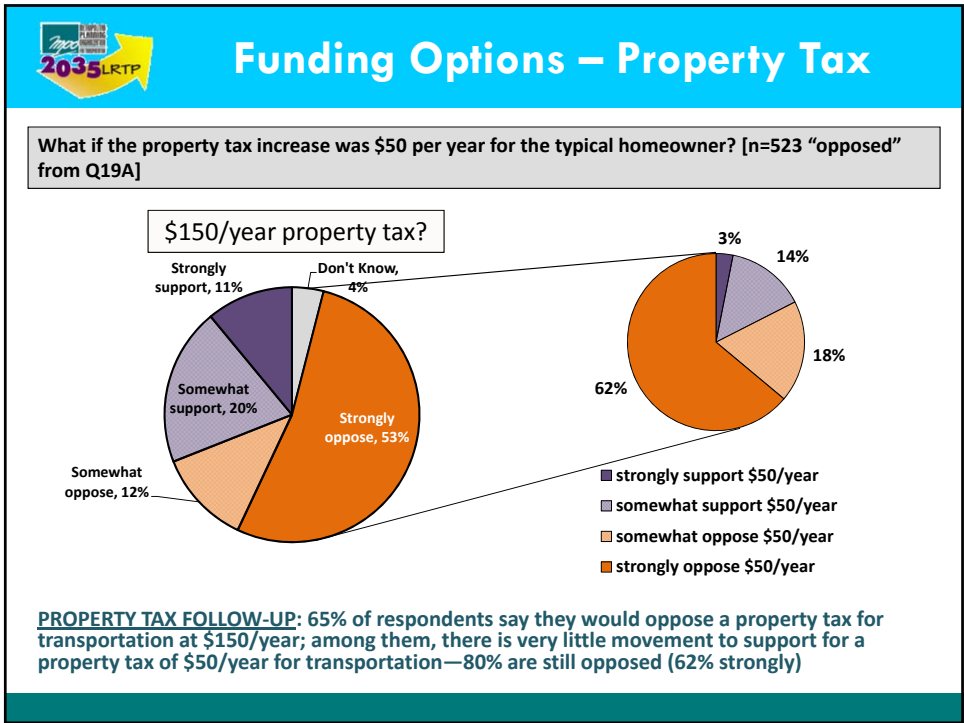
A sales tax increase of one-cent, which would cost the typical 3-person household about \$15 per month.

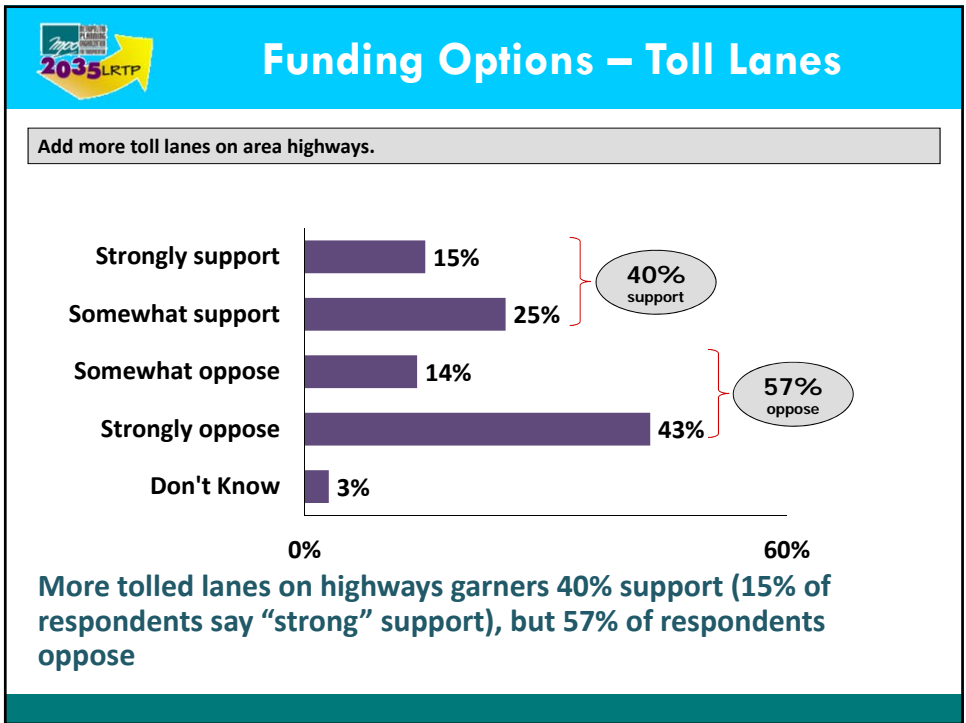
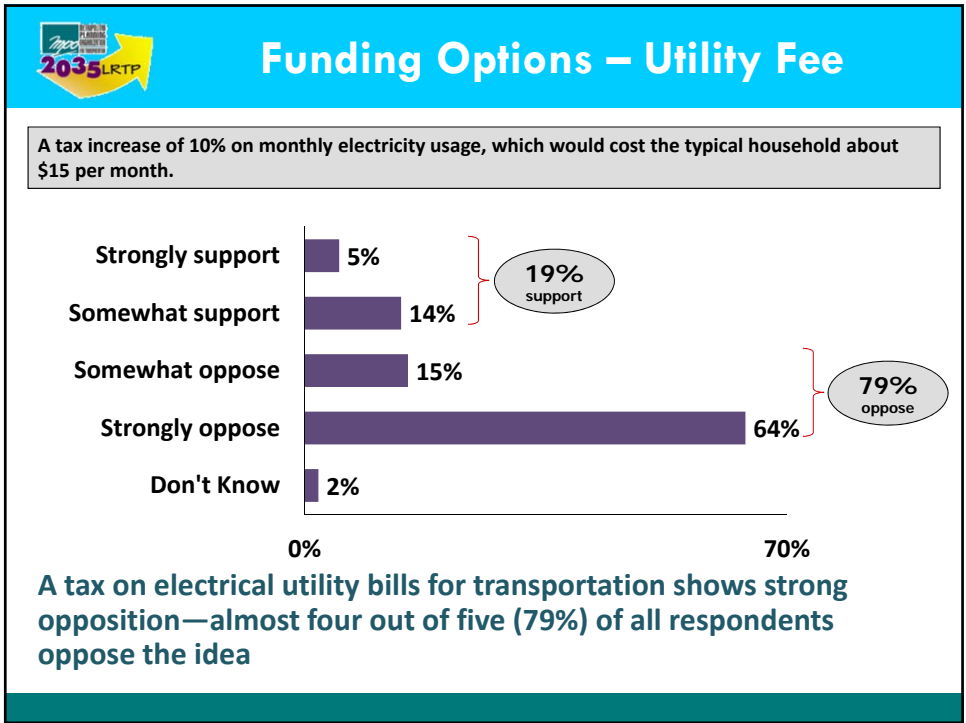
Response	Percentage
Strongly support	23%
Somewhat support	25%
Somewhat oppose	12%
Strongly oppose	38%
Don't Know	2%

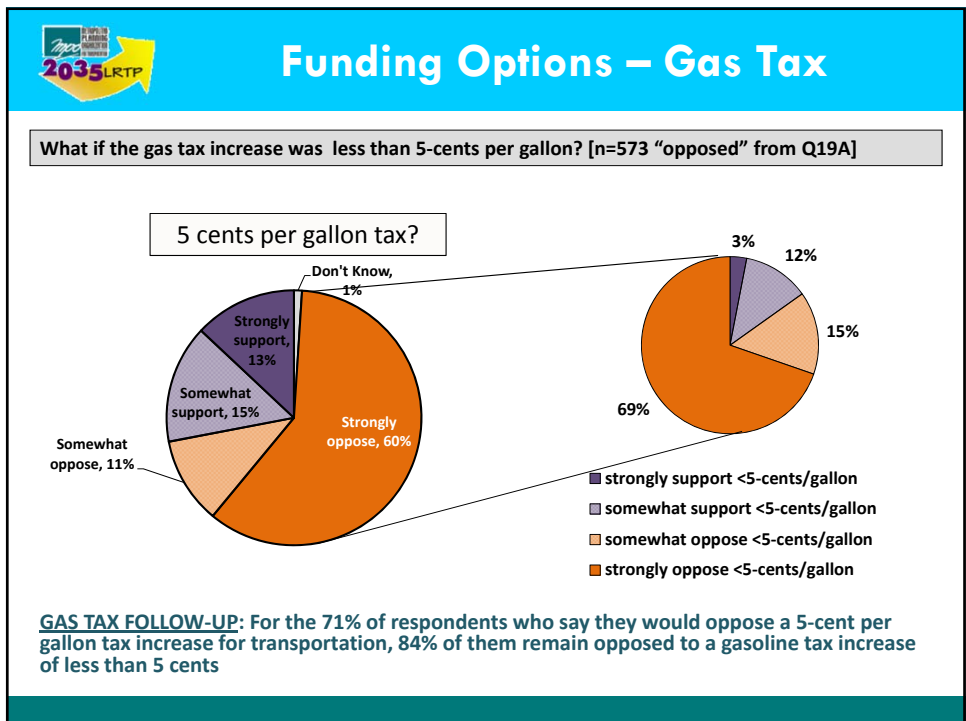
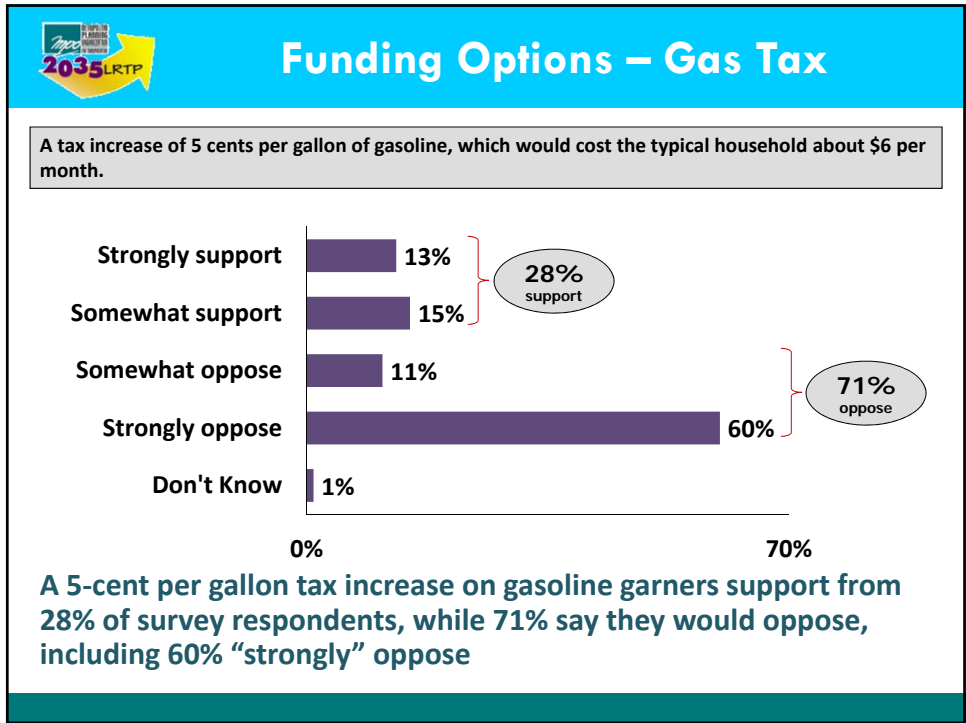
0% 60%

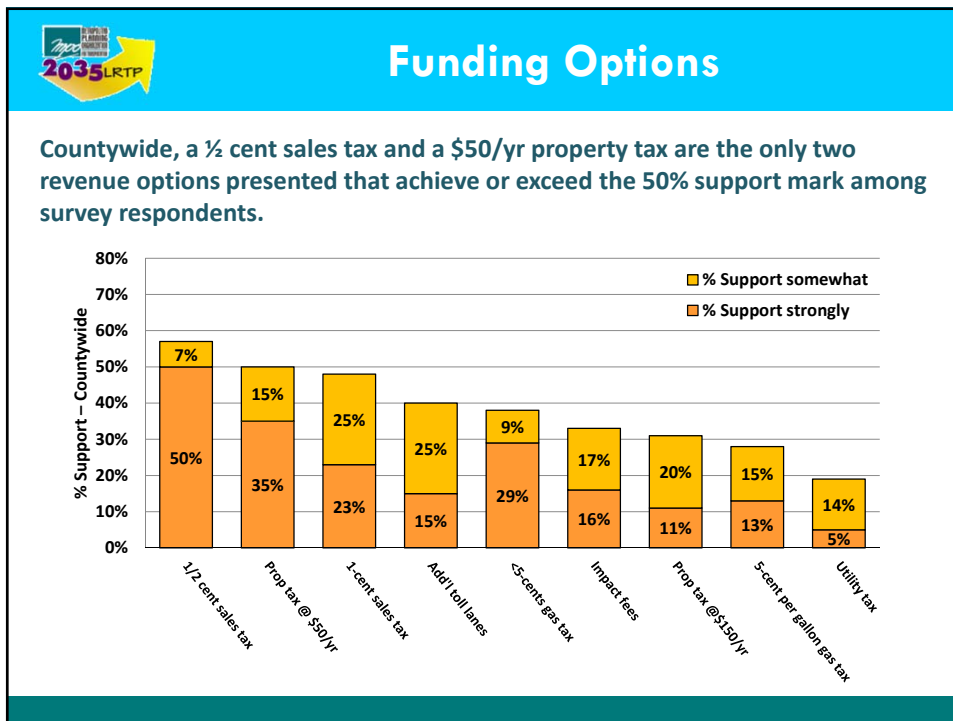
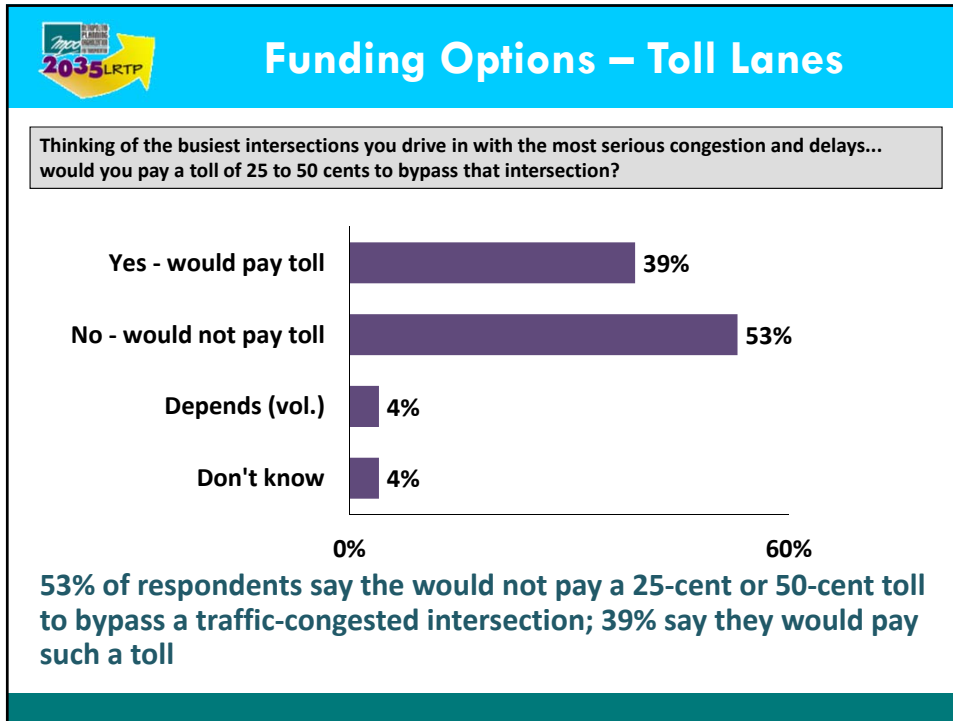
A 1-cent sales tax for transportation is roughly split down the middle, with 23% strongly supportive but 38% strongly opposed

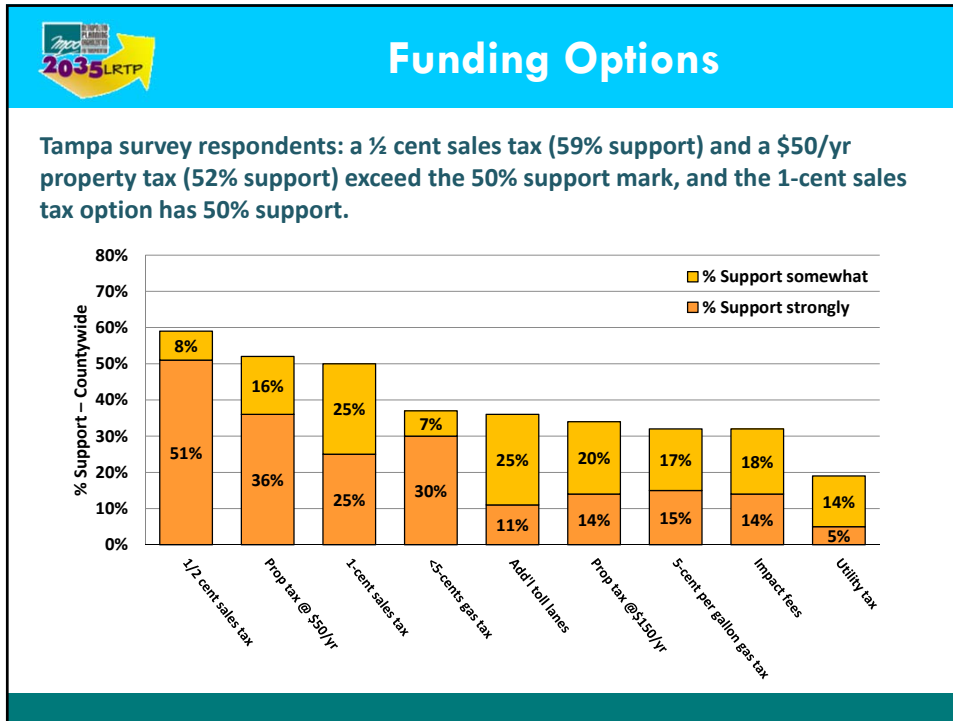












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- Election Authority for Cities**
- Key findings
 - We asked for a basic reaction to a policy change to the state statutes that would allow large cities in Florida—such as Tampa—to conduct their own sales tax referenda for transportation improvements
 - Countywide, 58% of respondents agree that state law should be changed to give cities this authority and 36% disagree
 - A strong majority of respondents are in favor in every County Commission district
 - Among Tampa respondents, 61% agree and 37% disagree



Election Authority for Cities

Regardless of how you think you would vote, do you agree or disagree that incorporated cities in Florida should have the authority to conduct their own sales tax elections separate from counties?

Area	Agree			Disagree			Agree – Disagree Margin
	Strongly	Somewhat	Net	Strongly	Somewhat	Net	
District 1	41%	17%	58%	6%	27%	33%	+25%
District 2	38%	23%	61%	9%	25%	34%	+27%
District 3	41%	18%	59%	13%	23%	36%	+23%
District 4	31%	22%	53%	10%	30%	40%	+23%
Tampa	40%	21%	61%	9%	29%	37%	+24%
Rest of county	36%	20%	56%	9%	29%	37%	+19%

Support for this policy is fairly strong across the board. It’s highest among respondents in Commissioner Districts 1, 2 and 3—and among Tampa survey respondents, 61% agree with the policy change



Summary of Survey Results

- Traffic congestion and transportation are viewed as serious problems
- Priorities (in order)
 - Maintenance and improvements to intersections
 - Expanded bus service
 - Pedestrian facilities & safety
 - Demonstration line of rail transit
- Rail transit
 - Adding information on lower cost approaches improves the receptivity (e.g., "using existing under-used tracks")
- Funding
 - Not a critical mass (60%+ support) for additional taxes or fees at this time
 - Sales tax is the only funding option that has traction
 - "Lowering the price" does not tip the scales or build critical mass of support.
 - Influential factors: age, and confidence in the economy
- Strong margin of support for giving cities sales-tax referenda authority



Next Steps

- Develop conceptual plan for Bus Rapid Transit on managed lanes being considered by FDOT
- Develop project list
- Develop Project Delivery and Accountability Plan