

Phase Three: 2035 Plan Post Referendum Analysis  
Technical Memorandum: Phone Survey Summary (7/31 – 8/5, 2012)

Prepared For:



601 East Kennedy Boulevard  
Tampa, FL 33602

Prepared By:

the **kenney** group

1999 Broadway #4190  
Denver, CO 80202

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## 1.0 Executive Summary

### 1.1 Methodology

The Hillsborough County Metropolitan Planning Organization (MPO) is engaged in a process that re-visits its 2035 Long Range Transportation Plan (LRTP) and includes public opinion research among Hillsborough County residents on transportation issues. This report summarizes the results and key findings of a phone survey conducted with 806 Hillsborough County voters between July 31 and August 5, 2012. The survey was conducted by a live interview with an average duration of 19 minutes. To gather adequate subsets for analysis within the county, the survey sample was distributed across the County commissioner districts according to voting population in those districts. An oversample of 100 interviews was conducted among voters who are residents of the City of Tampa. Cell phone numbers were also included in the survey sample.

Demographics of the survey sample population were balanced to reflect the county's gender and political party registration profile. The topline, district-wide results have  $\pm 3.7\%$  margin of sampling error at a 95% confidence level. The phone survey was designed and conducted by the Kenney Group, a public affairs consulting and research firm that has conducted public opinion research on transportation issues in Hillsborough County since 2008—including the 2035 LRTP Phase I & II focus groups in 2011. (See Appendix C for key findings from those focus groups.)

### 1.2 Key Findings

**The economy is by far the top issue of concern, followed by Hillsborough County's transportation system and traffic congestion.**

Forty-eight percent (48%) of survey respondents say that jobs, employment and the economy are the most important issues facing the Tampa Bay area. However, transportation and traffic issues come next, and were cited by 15% of respondents as the top issue. Traffic congestion and the transportation system are viewed by 85% percent of survey respondents as a "serious problem" for the Tampa Bay area.

**Two-thirds of respondents say they have little or no mobility options other than driving their car, and 48% say they are unsatisfied with their non-driving transportation options.**

When asked if they have transportation options other than driving, 33% of respondents say they have "not that many," and 35% say they have "no options at all." Nearly one-half of survey respondents (48%) say they are unsatisfied with their non-driving options, including 26% who are "very unsatisfied." Only 17% of survey respondents say they are "very satisfied" with their transportation options other than driving.

**While respondents' top priorities for transportation improvements are driving-related, improvements to other modes are also high priorities, particularly the expansion of bus services and additional pedestrian improvements.**

Survey respondents give the highest-priority marks to street and road maintenance (96% say this is a high priority), followed by adding congestion-relief improvements such as turn lanes and traffic signal timing (86%). Following right behind as high priorities are expanding local bus service (84%), pedestrian safety improvements (83%), restoring cuts to bus service (78%), and adding transit service with local circulator busses (75%) and express busses (71%).

**A 59% majority of respondents countywide say that adding a demonstration rail line to a major employment center is a priority to improve the transportation system.**

Two possible demonstration rail lines are proposed in the survey: one between downtown Tampa and the airport, and another between downtown and the USF campus—and in both cases, 56% of respondents say this is a high priority. When provided with information that a commuter rail line could be implemented on existing tracks to save on costs, the percentage of respondents who consider rail transit a high priority increases to 67%.

**There is a split view on additional funding for transportation. The funding source with the most potential viability is a ½ cent sales tax—58% of respondents support that level for transportation improvements.**

Countywide, 50% of respondents say they would generally support paying more in taxes or fees to improve transportation in the Tampa Bay area, while 45% say they would oppose. Fifty-four percent (54%) of Tampa respondents say they would support paying more for transportation improvements, and 40% who say they would oppose. The funding source with the most potential viability is a ½ cent sales tax at 58% support—which includes 48% of countywide respondents who say they would support a 1-cent sales tax for transportation.

**There is 58% majority support for changing state law to give cities—such as the City of Tampa—the authority to have their own transportation election separate from their counties.**

Fifty-eight percent (58%) of respondents countywide (and 63% of Tampa respondents) agree that cities such as Tampa should have the option to conduct their own referenda for transportation improvements separate from their counties.

## 2.0 Background, Research Objectives & Methodology

The Hillsborough County Metropolitan Planning Organization (MPO) has initiated a process to re-visit its 2035 Long Range Transportation Plan (LRTP) which was adopted in 2010 and proposes a major countywide expansion of mass transit (light rail and commuter rail, in particular). In November 2010, Hillsborough County voters rejected a one-cent sales tax referendum to fund a proposed package of light rail, commuter rail, bus, road, pedestrian and bicycle improvements. With that result in the foreground, the process to re-visit the LRTP includes public opinion research with Hillsborough County residents to obtain direct feedback on the main components of the 2035 LRTP, gain insights into the community's highest-priority needs and desires in transportation, and gather feedback on potential funding sources to pay for transportation improvements.

The public opinion research effort is comprised of three phases. A first phase of focus groups was conducted in March 2011 with an emphasis on assessing the transportation priorities among Hillsborough County residents. A second phase of focus groups was conducted in November 2011, with an emphasis on gathering feedback on various funding scenarios to finance transportation improvements. (Key findings from Phase I and Phase II focus groups are attached to this memo in Appendix B.) This phone survey is the third research component.

The research objectives of this phone survey are to take the core findings and takeaways from the focus groups, and test them on a much larger sample size to gather statistically valid benchmark data on: 1) Hillsborough County voters' attitudes and perceptions of traffic and the transportation system; and 2) county voters' reaction to a range of potential funding options for transportation.

### 2.1 Methodology

The phone survey was conducted with 806 Hillsborough County voters between July 31 and August 5, 2012. The survey was conducted by a live interview with an average duration of 19 minutes. To gather adequate subsets for analysis within the county, the survey sample was distributed across the county commissioner districts according to voting population in those districts. An oversample of 100 interviews was conducted among voters who are residents of the City of Tampa. Cell phone numbers were also included in the survey sample.

Demographics of the survey sample population were balanced to reflect the county's gender and political party registration profile. The topline, district-wide results have  $\pm 3.7\%$  margin of sampling error at a 95% confidence level. The phone survey was designed and conducted by the Kenney Group, a public affairs consulting and research firm that has conducted public opinion research on transportation issues in Hillsborough County since 2008—including the 2035 LRTP Phase I & II focus groups in 2011.

## 3.0 Key Findings

**The economy, jobs and employment are the front-and-center, immediate issues of concern—though transportation follows right behind.**

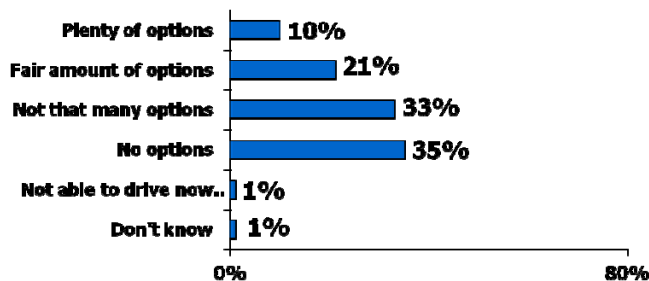
In an open-ended question, 48% of survey respondents say that jobs, employment and the economy are the most important issues facing the Tampa Bay area. A cluster of transportation-related issues—public transportation (9%), roads (3%) and traffic (3%)—comes next on the list. Eighty-five percent (85%) of respondents say that traffic congestion is a serious problem in the area—including 42% who say it is a “very serious” problem. This negative perception is consistent across the board among all respondent age ranges and geographic areas.

On the topic of the economy: 35% of respondents say they expect the economy to be stronger in one year, 37% say it will be “about the same,” and 15% expect it will be worse (and 14% do not have a formed opinion either way).

**Two-thirds of respondents say they have little or no mobility options other than driving their car, and 48% say they are unsatisfied with their non-driving transportation options.**

The respondents in this survey almost exclusively get around by car. Eighty-five percent (85%) of respondents say that they travel by car “all of the time” when they need to go somewhere, and an additional 9% of respondents say they travel by car “most of the time.” When asked if they have options other than driving, 33% of respondents say they have “not that many” and 35% say they have “no options at all.” The perception of having “no options at all” is most widespread among survey respondents in Hillsborough County Commission District Two (42%) and District Four (41%), compared to 20% of District Three respondents who say they have “no options.” (see below).

“Thinking about your options to driving such as public transportation, walking and bicycling, would you say that you have plenty of options other than driving your car, a fair amount of options, not that many options, or no options at all other than driving your car?”



Area	No options at all	Plenty of options
District 1	32%	11%
District 2	42%	8%
District 3	20%	18%
District 4	41%	7%
Tampa	29%	14%

By and large, the attitudes about personal transportation options are split down the middle. Nearly one-half of survey respondents (48%) say they are unsatisfied with their non-

driving options, including 26% who are “very unsatisfied.” Forty-four percent (44%) say they are satisfied with their transportation options, but only 17% of say they are “very satisfied.”

**The top priorities for transportation are driving-related, but improvements to other travel modes are highly desired—in particular, the expansion of bus services and additional pedestrian improvements.**

The survey provided a lengthy list of transportation improvements and asked respondents to classify each one as a high priority or a low priority. (See Appendix A for the complete list and “high” / “low” priority results.) Respondents are nearly unanimous in classifying roads and highway maintenance as a high priority (96% agree), followed by congestion-relief improvements such as turn lanes and traffic signal timing (86%).

Other modes follow right behind as high priorities: expanding local bus service (84% of respondents say that is a high priority), pedestrian safety improvements (83%), restoring cuts to bus service (78%), and adding more transit services with circulator busses (75%) and express busses (71%). Adding more bicycle lanes and trails is identified by 63% of respondents as a high priority.

**A 59% majority of respondents say that adding a demonstration line of rail transit is a high priority. Positive response to rail transit increases with information that a demonstration rail line can be implemented with significant cost savings by using existing freight train tracks.**

A majority (59%) of survey respondents countywide—and 64% of Tampa respondents—say that adding rail transit to a major employment center is a high priority. Two possible rail alignments—one between downtown Tampa and the Tampa airport, and another between downtown Tampa and the University of South Florida campus—are each separately classified by 56% of respondents as a high priority. Notably, 64% of respondents countywide (and 76% of Tampa respondents) say that “extending the downtown streetcar line to provide more connections between jobs and neighborhoods” is a high priority.

One additional piece of information that appears to boost support for a demonstration rail line is the statement that it could be implemented with significant cost savings by using existing but under-used freight rail train tracks: 67% of countywide respondents say this makes a demonstration line a high priority. Also, when told that using existing rail tracks means that a demonstration rail line could be “extended in the future to serve other major destinations in Hillsborough County and neighboring counties,” 69% of respondents say this makes a demonstration rail line a high priority.

**Survey respondents are split on the question of funding for transportation improvements.**

In a generic question asking “would you support or oppose paying more in taxes or fees to improve the transportation system in the Tampa Bay area?” 50% say they would support (including 25% “strongly support”), and 45% say they oppose (including 34% “strongly oppose”). The demographics with the highest levels of support are respondents who say transportation is their number one issue of local concern (67% of those respondents support additional funding) and younger respondents (60% support among 25-34 year olds, and 54%

among 18-24 year olds)—although 53% of respondents between 55-64 years are supportive. Also, 54% of Tampa respondents say they would support additional funding. Lower support for additional transportation taxes and fees is seen among 65+ year olds (44% support), 45-54 year olds (43%), and respondents who say they are “satisfied” with their travel options other than driving (44%).

Some of the strongest contrasts between supporters and opponents of additional taxes and fees for transportation improvements are tied to economic confidence and outlook. Sixty-three percent (63%) of respondents who say they expect that the economy will be better in one year also support additional transportation taxes and fees, compared to only 38% support among those who say they expect the economy will be weaker in one year. Fifty-six percent (56%) of respondents who say things in the Tampa Bay area are going “in the right direction” also say they would support additional taxes or fees for transportation, compared to only 44% support among those who think things are on the “wrong track.”

### **Among various funding options for transportation, a sales tax has the most support.**

Among survey respondents countywide, a one-cent sales tax for transportation receives support from 48% of respondents; 50% oppose—including 38% who “strongly oppose.” When respondents who oppose a 1-cent sales tax were asked if they would support a ½ cent sales tax for transportation, 17% move to the “support” column. Combining the 48% respondent support for a 1-cent sales tax and the ½-cent “movers” results in 58% level support for a ½-cent sales tax.

The other funding options for transportation have lower levels of support among survey respondents:

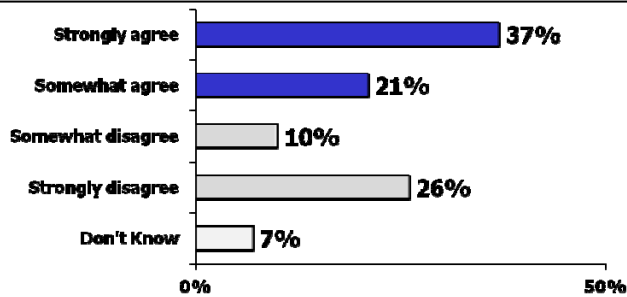
- 40% support for more tolled lanes on area highways
- 33% support for an impact fee on new construction and development
- 31% support for a property tax equivalent to \$150 per year for the average homeowner. Asking respondents who oppose a \$150 per year property tax if they would support a \$50 per year property tax results in 17% moving to support that lower amount.
- 28% support for a 5-cent per gallon gasoline tax. Asking respondents who oppose a 5-cent per gallon tax if they would support an amount less than 5-cents per gallon results in 15% moving to the “support” column.
- 19% support for a tax on electrical utility use equivalent to \$15 per month for the typical household.

### **Giving Tampa voters the authority to have a transportation referendum separate from Hillsborough County has strong majority countywide support.**



Survey respondents were provided with a brief overview that Florida state law only gives sales tax referendum authority to counties and not to cities. When asked if the Florida state law should be changed so that cities like Tampa would have the authority to have their own elections on matters such as a sales tax for transportation, 58% of respondents countywide say they agree—including 37% who “strongly agree.” As shown in the chart below, there is majority support for this authority among survey respondents in every County Commission District, and 61% agreement among Tampa respondents (37% disagree).

Q24: “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?”



	Agree	Disagree	Margin
District 1	58%	33%	+25%
District 2	61%	34%	+27%
District 3	59%	36%	+23%
District 4	53%	40%	+23%
Tampa	61%	37%	+24%
Non-Tampa	56%	37%	+19%

## Appendix A: Q15 - Transportation Priorities

[statements randomly rotated in survey interviews - ranked below in order of highest to lowest priority rating]	Very high	Some what high	NET HIGH PRIORITY		Some what 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, evenings and weekends (1/2 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%
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 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%
Build a demonstration commuter rail line connects downtown Tampa and 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%



**Appendix B: Final Weighted Toplines, Countywide & City of Tampa**

**HILLSBOROUGH COUNTY BASELINE SURVEY  
2035 LONG-RANGE TRANSPORTATION PLAN UPDATE  
JULY 31 - AUGUST 5, 2012**

**N = 806 | MARGIN OF ERROR = ±3.7% (countywide); ±5.8% (Tampa)**

*Reported totals may not add to 100% due to rounding*

**BEGIN BY ASKING FOR THE PERSON WHOSE NAME APPEARS ON YOUR CALLING LIST. IF THAT PERSON IS NOT AVAILABLE, ASK WHEN IT WOULD BE CONVENIENT TO CALL BACK.**

Hello .... My name is \_\_\_\_\_, I'm with TKG Research... a public opinion research firm conducting a brief opinion survey on local issues in Hillsborough County this evening ... and I was hoping I could ask you a few quick questions. We are not selling anything ... we are simply conducting research, and your local officials really need your opinions.

First. . .do you or does anyone in your household work for the media or for government at the state or local levels?

No	CONTINUE
Yes	TERMINATE
DK/NA	TERMINATE

**GENERAL DIRECTION/ECONOMY**

- Generally speaking, how do you feel things are going in **the Tampa Bay area**? Do you feel things are headed in the right direction, or do you feel that things have gotten off on the wrong track?

	<u>Countywide</u>	<u>Tampa</u>
Right direction	50%	55%
Wrong track	35%	31%
DK/NA	DON'T READ 15%	15%

2. What do you believe to be the most important issue facing the Tampa Bay area today?  
(open-ended question)

<u>Countywide</u>		<u>Tampa-only</u>	
Jobs/employment	39%	Jobs/employment	34%
Economy	9%	Economy	10%
Public Transportation	9%	Public Transportation	12%
Crime	7%	Crime	5%
Politics/City Hall/Finances	4%	Politics/City Hall/Finances	4%
Education	4%	Education	4%
Roads	3%	Roads	2%
Traffic	3%	Traffic	3%
Housing/foreclosure	3%	Housing/foreclosure	3%
Taxes	2%	Taxes	2%
Homeless	1%	Homeless	2%
Population/crowding	1%	Population/crowding	2%
Other (cumulative)	9%	Other (cumulative)	12%
Don't know	6%	Don't know	6%

3. Now, . . .thinking about the local economy, do you believe the economy in the Tampa Bay area will be stronger a year from now, about the same, or weaker in a year?

	<u>Countywide</u>	<u>Tampa</u>
Stronger in one year	35%	43%
About the same in one year	37%	29%
Weaker in one year	15%	14%
DK/NA	DON'T READ	14%

4. How much are you personally impacted by major gas price increases—a great deal, somewhat, not that much, or not impacted at all?

	<u>Countywide</u>	<u>Tampa</u>
A great deal	39%	35%
Somewhat	35%	36%
Not that much	20%	20%
Not impacted at all	5%	9%
DK/NA	DON'T READ	>1%

**END SERIES**

<b>TRAFFIC IMPACTS, OPTIONS TO DRIVING</b>
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*Thinking for the moment about traffic and transportation issues ....*

5. How serious of a problem is traffic congestion in the Tampa Bay area? Do you think traffic congestion is very serious, somewhat serious, not very serious, or not serious at all?

	Countywide	Tampa
Very serious	42%	45%
Somewhat serious	43%	40%
Not very serious	11%	10%
Not serious at all	3%	4%
DK/NA	DON'T READ	2%

6. How much does traffic congestion impact your daily life - a great deal, a fair amount, not very much, or not at all?

	Countywide	Tampa
A great deal	22%	21%
A fair amount	32%	32%
Not very much	34%	33%
Not at all	12%	13%
DK/NA	DON'T READ	>1%

7. Would you say that roads and highways in the Tampa Bay area are in very good condition, somewhat good condition, somewhat bad condition, or very bad condition?

	Countywide	Tampa
Very good condition	11%	9%
Somewhat good condition	56%	49%
Somewhat bad condition	25%	31%
Very bad condition	8%	10%
DK/NA	DON'T READ	1%

8. In general, when getting where you need to go in your area, how often do you travel by car -- all the time, most of the time, some of the time, or hardly ever?

	Countywide	Tampa
All the time	85%	80%
Most of the time	9%	11%
Some of the time	3%	5%
Hardly ever	3%	5%
DK/NA	DON'T READ	>1%

9. Now, thinking about various options to driving such as public transportation, walking and bicycling, would you say that you have plenty of options other than driving your car, a fair amount of options, not that many options, or no options at all other than driving your car?

	Countywide	Tampa
Plenty of options	10%	12%
Fair amount of options	21%	23%
Not that many options	33%	32%
No options	35%	30%
Not able to drive now (vol.)	DON'T READ	1%
DK/NA	DON'T READ	2%

10. And are you personally satisfied with the transportation options available to you other than driving, or are you unsatisfied? Is that “very” or “somewhat”?

	Countywide	Tampa
Very satisfied	17%	15%
Somewhat satisfied	27%	24%
Somewhat unsatisfied	22%	21%
Very unsatisfied	26%	32%
DK/NA	DON'T READ	7%

**END SERIES**

<b>PUBLIC TRANSPORTATION – GENERAL</b>
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11. Public transportation is currently funded through local taxes, like other community facilities such as libraries, parks, schools and road maintenance. Do you agree or disagree that local taxes should be used to fund public transportation? Is that strongly, or somewhat?

	Countywide	Tampa
Strongly agree	41%	49%
Somewhat agree	32%	27%
Somewhat disagree	10%	9%
Strongly disagree	13%	10%
DK/NA	DON'T READ	5%

**12. SPLIT SAMPLE - RANDOM ROTATE FORM A & FORM B**

**FORM A – RANDOM ½ SAMPLE [RANDOM ROTATE STATEMENTS A&B]**

Right now, which ONE of the following do you think should be the top priority for **improving transportation** in the Tampa Bay area?

A. Widening roads and highways with additional lanes.

OR

B. Providing more options to driving such as public transportation, pedestrian connections and bike trails.

		Countywide	Tampa
Widening roads and highways		39%	41%
Providing more options to driving		44%	43%
Do Both (vol.)	DON'T READ	13%	13%
DK/NA	DON'T READ	4%	4%

**FORM B – RANDOM ½ SAMPLE [RANDOM ROTATE STATEMENTS A&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?

A. Widening roads and highways with additional lanes.

OR

B. Providing more options to driving such as public transportation, pedestrian connections and bike trails.

		Countywide	Tampa
Widening roads and highways		43%	41%
Providing more options to driving		39%	45%
Do Both (vol.)	DON'T READ	13%	9%
DK/NA	DON'T READ	5%	6%



<b>HART</b>
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13. Hillsborough Area Regional Transit – or HART (pronounced “heart”) – is the agency that provides bus service in the county. Whether you use the system or not, what is your impression of the quality of services provided by HART—excellent, good, fair, poor or very poor?

	Countywide	Tampa
Excellent	6%	6%
Good	33%	36%
Fair	25%	27%
Poor	9%	9%
Very Poor	5%	5%
DK/NA	21%	18%

<b>ALTERNATE TRANSPORTATION MODES – VALUES</b>
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14. I’m going to read a series of statements about alternatives to driving such as walking, biking and taking public transportation. For each statement I read, please tell me if you think it is very important, somewhat important, not that important, or not important at all.

**RANDOM ROTATE/REPEAT CODES**

a. Providing public transportation so that people who are unable to drive, like the elderly and disabled, have mobility options.

	Countywide	Tampa
Very important	79%	81%
Somewhat important	14%	13%
Not that important	3%	3%
Not important at all	2%	2%
DK/NA	1%	1%

b. Providing public transportation to relieve traffic congestion on busy roads.

	Countywide	Tampa
Very important	56%	54%
Somewhat important	31%	33%
Not that important	6%	7%
Not important at all	5%	4%
DK/NA	2%	3%

c. Providing sidewalks and bike trails to promote active lifestyles and community health.

	Countywide	Tampa
Very important	57%	61%
Somewhat important	27%	27%
Not that important	8%	4%
Not important at all	6%	5%
DK/NA	DON'T READ	1%
		2%

- d. Providing public transportation so that people who can't afford to own a car or buy gas have mobility options.

	Countywide	Tampa
Very important	74%	77%
Somewhat important	18%	17%
Not that important	3%	3%
Not important at all	3%	2%
DK/NA	DON'T READ	1%
		1%

- e. Providing sidewalks, bike trails and public transportation to reduce pollution from automobiles and improve the environment and air quality.

	Countywide	Tampa
Very important	49%	54%
Somewhat important	30%	28%
Not that important	12%	10%
Not important at all	8%	6%
DK/NA	DON'T READ	2%
		3%

- f. Providing a good public transportation system to help attract new jobs and businesses to the Tampa Bay area.

	Countywide	Tampa
Very important	61%	64%
Somewhat important	23%	20%
Not that important	8%	7%
Not important at all	7%	7%
DK/NA	DON'T READ	2%
		3%

- g. Providing public transportation as one step to reduce gas consumption and our dependence on foreign and offshore sources of oil.

	Countywide	Tampa
Very important	53%	53%
Somewhat important	28%	31%
Not that important	11%	7%
Not important at all	6%	7%
DK/NA	DON'T READ	2%

**END SERIES**

<b>USES OF FUNDS – PRIORITIES</b>
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15. Local officials are updating the long-term transportation plans for the Tampa Bay area. I'm going to read you several options that have been considered to improve the transportation system. . .as I read each one, please tell me whether it should be a very high priority, a somewhat high priority, a somewhat low priority, or a very low priority.

**RANDOM ROTATE, REPEAT CODES**

a. Add more express bus routes.

	Countywide	Tampa
Very high priority	36%	41%
Somewhat high priority	35%	34%
Somewhat low priority	13%	12%
Very low priority	11%	8%
DK/NA	DON'T READ	5%

b. **SPLIT SAMPLE – 1/2 OF SAMPLE - FORM A**

**Expand** local bus service so it runs more often than once an hour and runs on evenings and weekends.

	Countywide	Tampa
Very high priority	53%	56%
Somewhat high priority	31%	28%
Somewhat low priority	7%	8%
Very low priority	5%	7%
DK/NA	DON'T READ	2%

**SPLIT SAMPLE – 1/2 OF SAMPLE – FORM B**

**Restore recent cuts to** local bus service so it runs more often than once an hour and runs on evenings and weekends.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	55%	58%
Somewhat high priority	23%	24%
Somewhat low priority	10%	10%
Very low priority	9%	5%
DK/NA	DON'T READ	3%

- c. Maintain streets, roads, bridges and highways to keep them in good condition.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	80%	79%
Somewhat high priority	16%	18%
Somewhat low priority	2%	2%
Very low priority	2%	1%
DK/NA	DON'T READ	1%

- d. Improve railroad crossings and build overpasses to reduce traffic delays caused by freight trains.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	35%	30%
Somewhat high priority	25%	26%
Somewhat low priority	20%	20%
Very low priority	18%	22%
DK/NA	DON'T READ	2%

- e. Build a rapid bus system in a special lane on Interstate 275 between Downtown Tampa and the Tampa airport.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	35%	36%
Somewhat high priority	26%	26%
Somewhat low priority	17%	17%
Very low priority	20%	18%
DK/NA	DON'T READ	2%

- f. Add more bicycle lanes and trails.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	31%	34%
Somewhat high priority	32%	29%
Somewhat low priority	20%	21%
Very low priority	16%	14%
DK/NA                      DON'T READ	2%	3%

- g. Add new sidewalks, crosswalks and safer pedestrian connections.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	52%	58%
Somewhat high priority	31%	28%
Somewhat low priority	10%	7%
Very low priority	7%	4%
DK/NA                      DON'T READ	1%	2%

- h. Extend the downtown streetcar line to provide more connections between jobs and neighborhoods.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	36%	40%
Somewhat high priority	28%	26%
Somewhat low priority	16%	15%
Very low priority	17%	15%
DK/NA                      DON'T READ	4%	4%

- i. Add new express lanes—with tolls—on major roads and interstate highways.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	20%	19%
Somewhat high priority	27%	29%
Somewhat low priority	20%	20%
Very low priority	32%	29%
DK/NA                      DON'T READ	2%	3%

- j. Add one demonstration light rail or commuter rail line to a major employment center.

	Countywide	Tampa
Very high priority	36%	42%
Somewhat high priority	23%	22%
Somewhat low priority	16%	13%
Very low priority	22%	19%
DK/NA	DON'T READ	4%

- k. Add water ferry service to connect key waterfront areas of Tampa Bay.

	Countywide	Tampa
Very high priority	20%	21%
Somewhat high priority	24%	25%
Somewhat low priority	21%	19%
Very low priority	30%	29%
DK/NA	DON'T READ	5%

- l. Add turn lanes and traffic signal improvements to reduce delays at congested intersections.

	Countywide	Tampa
Very high priority	61%	58%
Somewhat high priority	25%	27%
Somewhat low priority	7%	8%
Very low priority	5%	5%
DK/NA	DON'T READ	2%

- m. Run circulator shuttle buses in your area with service to schools, shopping and medical centers.

	Countywide	Tampa
Very high priority	40%	43%
Somewhat high priority	35%	31%
Somewhat low priority	13%	14%
Very low priority	10%	10%
DK/NA	DON'T READ	2%

**END SERIES**

<b>RAIL TRANSIT MODULE</b>
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16. On this same topic. . .another transportation option that has been studied in Hillsborough County is adding commuter rail or light rail. . . I'm going to read you a couple of options for rail transit . . . as I read each one, please tell me whether it should be a very high priority, a somewhat high priority, a somewhat low priority, or a very low priority.

**a. SPLIT SAMPLE – ½ OF SAMPLE, FORM A**

Build a demonstration commuter rail line that connects Downtown Tampa and the University of South Florida campus, which combined have nearly 90,000 jobs and students.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	37%	45%
Somewhat high priority	28%	23%
Somewhat low priority	13%	11%
Very low priority	19%	19%
DK/NA	4%	2%

DON'T READ

**½ OF SAMPLE, FORM B**

Build a demonstration commuter rail line that connects Downtown Tampa and the University of South Florida campus.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	29%	37%
Somewhat high priority	27%	25%
Somewhat low priority	17%	13%
Very low priority	23%	23%
DK/NA	4%	2%

DON'T READ

b. Build a demonstration commuter rail line that connects Downtown Tampa and the Tampa airport.

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	33%	37%
Somewhat high priority	23%	23%
Somewhat low priority	18%	14%
Very low priority	22%	24%
DK/NA	3%	2%

DON'T READ

c. What if I told you that to save on costs, the demonstration rail line would run on existing but under-used freight train tracks? In your opinion, would that information make a

demonstration rail line a very high priority, a somewhat high priority, a somewhat low priority, or a very low priority?

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	36%	42%
Somewhat high priority	32%	27%
Somewhat low priority	12%	10%
Very low priority	17%	17%
DK/NA	4%	3%

- d. And what if I told you that the demonstration rail that uses existing tracks could be extended in the future to serve other major destinations in Hillsborough County and neighboring counties. In your opinion, would that information make a demonstration rail line a very high priority, a somewhat high priority, a somewhat low priority, or a very low priority?

	<u>Countywide</u>	<u>Tampa</u>
Very high priority	40%	44%
Somewhat high priority	29%	25%
Somewhat low priority	11%	12%
Very low priority	17%	17%
DK/NA	3%	2%

## END SERIES

### SOURCES OF FUNDS – OPTIONS

17. Changing subjects a little bit. . . paying for most of the identified transportation needs in the Tampa Bay area would require more public financing than is available at the local, state or federal levels. While there are currently no specific plans for funding proposals... just generally speaking, would you support or oppose paying more in taxes or fees to improve the transportation system in the Tampa Bay area? Is that “strongly” or “somewhat”?

	<u>Countywide</u>	<u>Tampa</u>
Strongly support	25%	31%
Somewhat support	25%	23%
Somewhat oppose	11%	10%
Strongly oppose	34%	30%
Depends (volunteer)	4%	4%
DK/NA	2%	2%



18. And, in your own words, what is the main reason why you would support/oppose paying more in taxes or fees to improve transportation? [open end]

<i>Reasons Support</i>	<u>Countywide</u>	<u>Tampa</u>
Good for community/business	11%	13%
Needed/needs to be done	10%	14%
Willing to pay for improvement	8%	8%
Alleviate congestion/traffic/pollution	8%	7%
Support (general)	5%	4%
 <i>Reasons Oppose</i>		
Raise taxes/can't afford	24%	22%
Mistrust government/poor plan	6%	5%
Unnecessary/not needed	4%	4%
Need private/different funding	4%	4%
Don't use/wouldn't use	3%	3%
Oppose (general)	3%	3%
Poor use of money/higher priorities	1%	1%

19. I'm going to read several options often used to fund local transportation improvements. After I read each one, please tell me whether you would strongly support, somewhat support, somewhat oppose, or strongly oppose it—and remember, each of these would be dedicated just for transportation improvements.

**RANDOM ROTATE, REPEAT CODES**

**KEEP PAIRED Qs a and a2; b and b2; f and f2 TOGETHER IN SEQUENCE**

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

		<u>Countywide</u>	<u>Tampa</u>
Strongly support	SKIP TO b	23%	25%
Somewhat support	SKIP TO b	25%	25%
Somewhat oppose	CONTINUE TO a2	12%	14%
Strongly oppose	CONTINUE TO a2	38%	33%
DK/NA	DON'T READ	2%	4%

**Ask a2 only of “Somewhat opposed” and “strongly opposed” on 19a**

a2. What if the sales tax increase was a half-cent, which would cost the typical 3-person household about \$8 per month. [n=415 countywide, n=143 Tampa]

		<u>Countywide</u>	<u>Tampa</u>
Strongly support		3%	5%
Somewhat support		14%	16%
Somewhat oppose		18%	22%
Strongly oppose		62%	51%
DK/NA	DON'T READ	4%	6%

b. A property tax increase which would cost the typical homeowner about \$150 per year.

		<u>Countywide</u>	<u>Tampa</u>
Strongly support	SKIP TO c	11%	14%
Somewhat support	SKIP TO c	20%	20%
Somewhat oppose	CONTINUE TO b2	12%	12%
Strongly oppose	CONTINUE TO b2	53%	49%
DK/NA	DON'T READ	4%	5%

**Ask b2 only of “Somewhat opposed” and “strongly opposed” on 19b**

b2. What if the property tax increase was set at a lower amount and cost the typical homeowner about \$50 per year. [n=555 countywide, n=187 Tampa]

		<u>Countywide</u>	<u>Tampa</u>
Strongly support		6%	4%
Somewhat support		21%	24%
Somewhat oppose		14%	17%
Strongly oppose		56%	51%
DK/NA	DON'T READ	3%	4%

c. An impact fee on new construction and development, which would add five to ten thousand dollars to the cost of a new house.

		<u>Countywide</u>	<u>Tampa</u>
Strongly support		16%	14%
Somewhat support		16%	18%
Somewhat oppose		13%	20%
Strongly oppose		51%	44%
DK/NA	DON'T READ	4%	4%

d. A tax increase of 10% on monthly electricity usage, which would cost the typical household about \$15 per month.

		Countywide	Tampa
Strongly support		5%	5%
Somewhat support		14%	14%
Somewhat oppose		15%	20%
Strongly oppose		64%	60%
DK/NA	DON'T READ	2%	2%

e. Add more toll lanes on area highways.

		Countywide	Tampa
Strongly support		15%	11%
Somewhat support		25%	25%
Somewhat oppose		14%	18%
Strongly oppose		43%	43%
DK/NA	DON'T READ	3%	4%

f. A tax increase of 5-cents per gallon of gasoline, which would cost the typical household about \$6 per month.

		Countywide	Tampa
Strongly support	SKIP TO Q21	13%	15%
Somewhat support	SKIP TO Q21	15%	17%
Somewhat oppose	CONTINUE TO f2	11%	13%
Strongly oppose	CONTINUE TO f2	60%	53%
DK/NA	DON'T READ	1%	2%

**Ask f2 only of “Somewhat opposed” and “strongly opposed” on 19f**

f2. What if the increase was less than 5 cents per gallon of gasoline? [n=586 countywide, n=190 Tampa]

		Countywide	Tampa
Strongly support		3%	2%
Somewhat support		12%	10%
Somewhat oppose		15%	21%
Strongly oppose		69%	65%
DK/NA	DON'T READ	2%	3%

**END SERIES**

20. Thinking of the busiest intersections you drive in with the most serious congestion and delays. . . would you pay a toll of 25 to 50 cents to bypass that intersection?

		<u>Countywide</u>	<u>Tampa</u>
Yes		39%	35%
No		53%	57%
Depends (vol.)	DON'T READ	4%	3%
DK/NA	DON'T READ	4%	5%

**END SERIES**

21. Can you think of other general community needs in the Tampa Bay area that need immediate attention and should be combined with any funding proposal for transportation improvements?

**OPEN END, DO NOT READ CODES**

	<u>Countywide</u>	<u>Tampa</u>
K-12 schools	10%	9%
Public Safety	8%	7%
Parks & recreation	4%	4%
Higher education	9%	7%
Homeless services	11%	12%
Hospitals/clinics/healthcare	6%	5%
Preschool/daycare options	3%	3%
Libraries	3%	3%
Job creation/econ development	21%	18%
No/none	39%	41%
Other	6%	6%
Roads	5%	7%
Public Transportation	3%	1%
Don't know/no answer	9%	1%

**END SERIES**

**SUNSET PROVISION, GOVERNANCE**

22. What if a tax or fee proposal for transportation had a “sunset” feature, so it’s only imposed for a specific number of years? Would that “sunset” feature make you much more likely to support it, somewhat more likely, somewhat less likely, or much less likely to support?

		<u>Countywide</u>	<u>Tampa</u>
Much more likely to support		22%	24%
Somewhat more likely to support		30%	28%
Somewhat less likely to support		8%	18%
Much less likely to support		23%	19%
Would not make a difference [vol.]	DON'T READ	14%	5%
DK/NA	DON'T READ	4%	5%

23. And what if transportation improvement projects were overseen by a citizen’s group to ensure that the money is spent for its intended purposes. . .would that make you more likely or less likely to support a tax or fee proposal to improve transportation?

		<u>Countywide</u>	<u>Tampa</u>
Much more likely		29%	29%
Somewhat more likely		32%	31%
Somewhat less likely		7%	5%
Much less likely		18%	17%
Would not make a difference [vol.]	DON'T READ	11%	16%
DK/NA	DON'T READ	4%	3%

**END SERIES**

**TAMPA REFERENDUM AUTHORITY**

24. Under current Florida state law, counties can hold elections on sales taxes, but cities do not have this authority. Some people say that large cities like Tampa should have the authority to hold their own elections for taxes on things like improving its transportation system, and not be tied to a countywide election. 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? Is that “strongly” or “somewhat”?

		<u>Countywide</u>	<u>Tampa</u>
Strongly agree		37%	42%
Somewhat agree		21%	21%
Somewhat disagree		10%	9%
Strongly disagree		26%	20%
DK/NA	DON'T READ	7%	8%

**DEMOGRAPHICS**

**Now I just have a couple of additional questions for demographic purposes only**

**COUNTYWIDE TOTALS [N=806]**

Record gender (from sample)

Male	49%
Female	51%

Record party affiliation (from sample)

Rep	33%
Dem	41%
Ind	26%

GEOGRAPHY Record codes: *county commission district*

District 1	23%
District 2	28%
District 3	19%
District 4	30%

25. First ... can you please tell me your age group? Just tell me when to stop.

UNDER 25	8%
26 - 34	17%
35 - 44	18%
45 - 54	20%
55 - 64	17%
65 & OVER	20%
DK/NA/Refused	>1%

26. Just for statistical purposes, what is your total annual household income ... again ... please just tell me when to stop.

Less than \$15,000	4%
Between \$15,000 and \$25,000	8%
Between \$26,000 and \$35,000	9%
Between \$36,000 and \$55,000	15%
Between \$56,000 and \$75,000	14%
Between \$76,000 and \$100,000	12%
Between \$101,000 and \$150,000	7%
Greater than \$150,000	6%
DK/NA/REFUSED DON'T READ	26%

27. And how long have you lived in Hillsborough County?

Less than one year	1%
1 to 5 years	7%
6 to 10 years	18%
11 to 15 years	13%
16 to 20 years	12%
More than 20 years	49%
DK/NA/REFUSED DON'T READ	>1%

28. What is the last year of schooling that you have completed?

High school graduate or less	22%
Some college	22%
Associate degree	10%
College graduate	28%
Graduate school	18%
DK/NA/REFUSED DON'T READ	2%

29. Which ONE of the following best describes your current employment situation – employed, unemployed, retired, student or a homemaker?

Employed – outside the home	45%
Employed – at home	5%
Unemployed	8%
Retired	35%
Student	3%
Homemaker	3%
Refused	1%
DK/NA DON'T READ	1%

30. Which of the following describes your race? You can select as many as apply.

White	61%
Black or African-American	17%
Asian or Asian-American	15%
Hispanic, Latino, or Spanish origin	3%
Some other race (VOL) DO NOT READ	3%
Don't know/Refused DO NOT READ	2%

31. Please estimate how many miles you drive in a year – less than 7,000 miles a year, between 7,000 and 13,000 miles a year, or more than 13,000 miles a year? If you don't drive, please say so.

Less than 7,000 miles	24%
Between 7,000 and 13,000 miles	37%
More than 13,000 miles	35%
Don't drive	3%
DK/NA      DON'T READ	2%

32. Do you or a driver in your household have a SunPass for local toll roads?

Yes	53%
No	46%
DK/NA      DON'T READ	1%

**Thank you and have a good night**



## **Appendix C: Key Findings from Phase I & II Focus Groups (conducted March 2011, November 2012)**

### **Phase I Focus Groups – Transportation Priorities**

1. Hillsborough County's traffic situation is a byproduct of local government's failure to plan ahead and ensure adequate transportation infrastructure.
2. The most popular strategies proposed to address traffic congestion were small and targeted: improving traffic flow on local roads, not adding new modes to the system.
3. Many focus group participants think that the Tampa area and Hillsborough County are too sprawling, too car-centric, and too dispersed for mass transit to ever truly make an impact.
4. The focus groups' collective perception of the current bus system is neutral at best, negative at worst, and for participants from the unincorporated parts of Hillsborough County, there is no baseline perception at all.
5. Participants who were in favor of expanding mass transit generally supported a more incremental approach.
6. Focus group participants from every corner of Hillsborough County were virtually unanimous that the pedestrian and bicycle infrastructure is dismal and a safety risk.

### **Phase II Focus Groups – Transportation Funding Scenarios**

1. The broader the application of the tax or fee (e.g., sales tax), the stronger the support.
2. Concerns and skepticism about government accountability and transparency were major obstacles to support of any of the funding scenarios for transportation.
3. The diversity of Hillsborough County's transportation needs presents a major challenge to building unified support for any specific funding scenario.
4. The notion of the City of Tampa moving forward with a transportation funding proposal on its own, separate from the county, generated moderate interest.
5. Reactions to the various funding scenarios suggest that, at some level, there should be a direct link between the funding source and transportation.
6. Public-private partnerships were received as a reasonable approach to major transportation improvements.

7. The recollection of the 2010 Hillsborough County transportation sales tax referendum was very limited—and mostly inaccurate.