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## HILLSBOROUGH COUNTY SUSTAINABLE GROWTH SURVEY EXECUTIVE SUMMARY

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In 2019, the BOCC and Planning Commission reached out to HCP Associates seeking statistically valid feedback on growth and development within unincorporated Hillsborough County.

### Stakeholder Interviews

Stakeholder interviews are individual, journalist-style interviews with 38 key stakeholders. These interviews provided important context and gained feedback from three key stakeholder groups.

**Infill Stakeholders:** This group comprised 12 everyday residents of areas that may be targeted for increased density and intensity by Hillsborough County. They spoke of the effects of population growth on their lives and issues of public transit and personal mobility.

#### Key Takeaways

Infill stakeholders agreed that county services need to keep up with increased population growth. Roads, traffic, and public schools received the most attention.

Infill stakeholders agreed that increased population growth brings economic benefits and greater diversity of retail and entertainment opportunities.

Infill stakeholders largely agreed that walkability and public transit are not viable options for their neighborhoods as currently configured. However, they have different opinions on the value of attempting to improve transit and walkability within their communities.

Infill stakeholders primarily selected their place of residency considering cost and family factors.

Infill stakeholders agreed that concentrating development in urban areas is sound policy.

**Rural Stakeholders:** This group consisted of several parties, including environmental groups, agriculture groups, and owners of large parcels of land in unincorporated Hillsborough County.

#### Key Takeaways

Rural stakeholders value preserving “rural lifestyle” – having space, fewer neighbors, etc.

These stakeholders also agree that population growth should be centered in urban areas.

They feel that increased population growth is putting pressure on traffic, roads, and other county infrastructure.

According to them, Transfer of Development Rights (TDR) programs are unlikely to effectively prevent rural development; highly informed stakeholders raised concerns about receiving areas, while others expressed great reluctance to surrender development rights.

Rural stakeholders raised alarm that policies designed to protect rural lands could clash with landowners’ property rights, creating contentious and litigious circumstances.

Rural stakeholders predict that increased suburbanization of rural lands will continue to be the trend. This is because Hillsborough County remains the center of urbanization for the Tampa Bay Area.

Opinions sharply differ on the value of legislation to limit growth and development. Agriculture perspectives warn that attempts to protect agriculture could backfire if they lower the value of properties used in financing. Environmental perspectives stressed the importance of growth limits to preserve open spaces, water quality, and local species. Other stakeholders raised the prospect of annexation efforts by Temple Terrace and Plant City that could go against Hillsborough County’s efforts.

Rural stakeholders share different opinions on the county’s ELAPP program; some defended the program’s work, while others accused it of overreach.

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**Developer Stakeholders:** This group was made up of real estate developers over the full spectrum of the industry, including affordable and workforce housing developers, mixed-use developers, firms specializing in redevelopment, and master-planned community developers.

#### Key Takeaways

Developers feel that Hillsborough County is taking proactive steps to encourage affordable housing.

In their view, “not in my backyard” (NIMBY) sentiment is burdensome to both new development and redevelopment; this adds uncertainty to new projects.

Developers argued that the Comprehensive Plan could use an update.

Developers praise county and Planning Commission staff as professional and timely.

Market forces, they say, are why redevelopment primarily occurs within the City of Tampa.

Developers indicated that increased impact fees and other regulations increased the price of even the most modest home construction; they foresee this problem worsening.

Opinions differ on the value of the Urban Service Area; some emphasize its importance while others present it as a barrier to developing lower-cost housing.

Opinions vary on the value of designating areas for increased infill; many suggest that only market forces or substantially greater county action would affect their decision making.

Opinions vary on the relative developer-friendliness of Hillsborough County compared to others; some claim that it was mainly like other counties while others cite an “anti-growth” sentiment in Hillsborough County.

## Telephonic Survey

A telephonic survey of 1,300 residents in **unincorporated** Hillsborough County was deployed between January 22, 2021, through March 11, 2021, to gain a robust sampling of the area that corresponds to its demographics as defined by the US Census Bureau. The margin of error for these results is 2.72%.

#### Key Takeaways

91% of residents agree that Hillsborough County should limit or discourage new development to protect agricultural and environmental lands.

71% of residents feel that Hillsborough County should encourage each part of the county to have its own community identity.

66% of residents believe that widespread development outside city centers is an issue facing the county.

65% of residents think that infrastructure and services have not generally kept up with growth in the county.

Concern about infrastructure is centered around roads, which 89% feel have not kept up. Public transportation, sidewalks, and bike lanes also were perceived to have not kept up.

For other infrastructure and service items – police, fire, emergency services, schools, trails and parks, sewer, water, libraries, and community centers – strong majorities believe that these **have** kept up with growth.

Residents prioritize characteristics related to families and neighborhood amenities over factors involving connectivity and transit. 77% say that it is very important to live in a community that is a good place to raise children, while only 39% say that the same for a community with convenient access to public transit. This prioritization is similar to a nationwide study of suburban residents across the United States by PEW.

Economics provides residents with the choice of two of three items: housing affordability, commute length, and housing size. Overwhelmingly, residents prioritize housing affordability and housing size over commutes.

When thinking about relocating to a new area, residents desire to move to a more rural area. This is driven mainly by wanting factors associated with raising families, especially space, and the desire to be homeowners.