

# HART Community Opinion Survey - Executive Summary

June 2005

## Introduction

HARTLine commissioned a survey of Hillsborough County adults identifying their opinions on transportation and transit development in the County, ratings of agency performance and preferred options. The interviews, conducted in early June 2005, established and described the prospective markets for Hartline, and the actions required for people to begin riding.

The survey included a 15 minute telephone interview with 500 adults randomly selected from every area of Hillsborough County, and 4 focus groups with people currently not using HARTline. A 500 person survey will accurately portray the opinions of all adults in the County with only a 4.8% range of error at the 95% confidence level. The survey was conducted by Ilium Associates of Bellevue Washington, a firm with 30 years of experience in transportation and transit consumer research and market planning.

The results provide valuable information for decision-makers including directing HARTline near and long term programs for service development and marketing, and for evaluating agency performance over time.

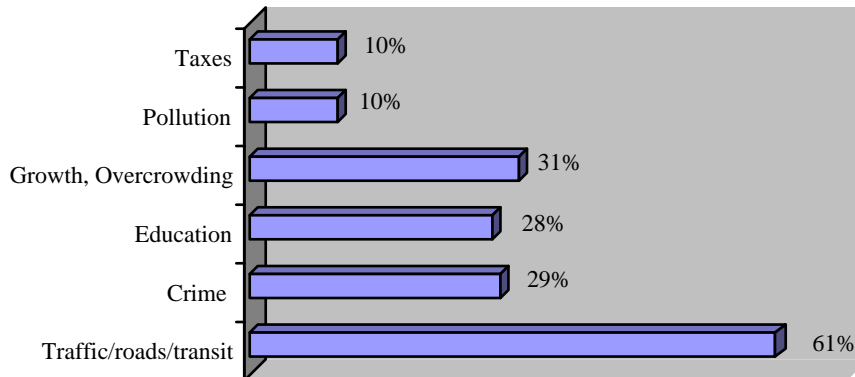
## Important Results

### In every area of the County, transportation is by far the most important issue.

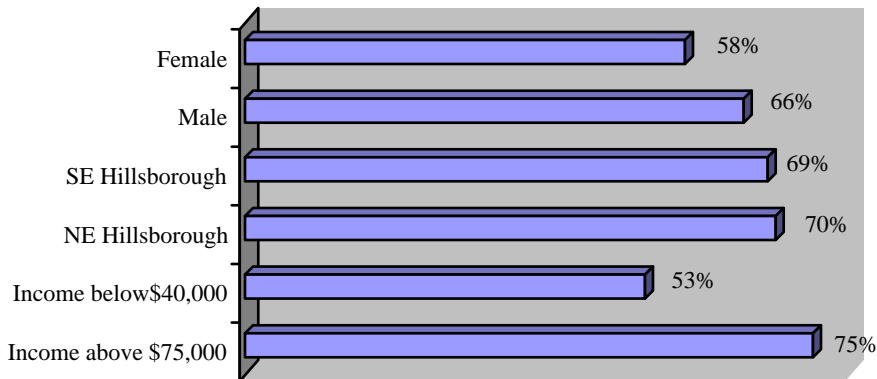
When asked about the most important issues facing the County, transportation (incorporating congestion, roads and transit) is mentioned by 61% of the residents, far more than crime (29%), education (28%) or high taxes (10%). People residing in the NE and SE portions of the county, men more than women, and those with household incomes exceeding \$75,000 a year are most sensitive to this issue.

When asked directly about traffic congestion, 83% of the County population agree it is a major issue.

### Most Important Issues Facing County



## Percent Mentioning Traffic/Roads/Transit



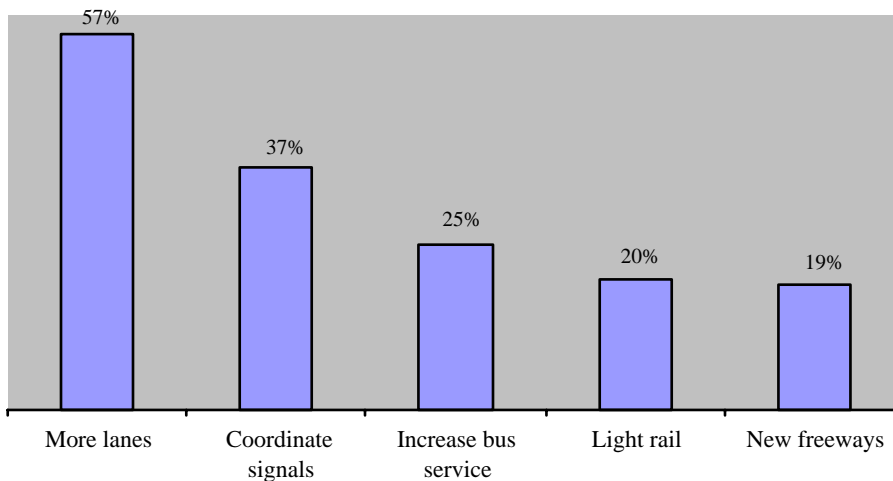
## More Lanes, Improved Traffic Signalization and Expanding Bus Services Are the Top 3 Traffic Reduction Priorities

When read a set of possible improvements to reduce traffic congestion, adding more lanes on existing freeways/roads is a priority to a majority of the public. The second priority is improved traffic signal coordination favored by 37% and transit improvements are third, seen as a priority by 25% of the public. Building a light rail system garners support from one in five residents, the same as building new freeways.

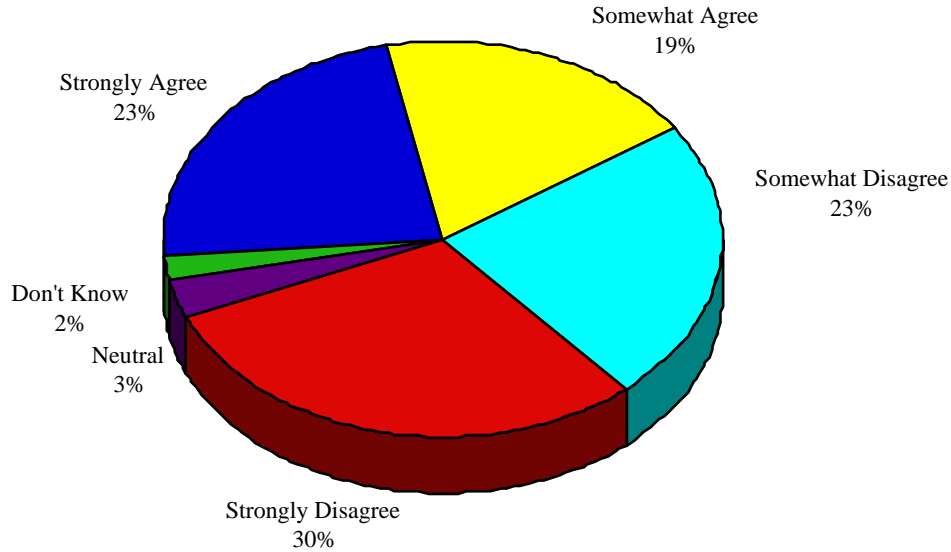
Adding more lanes has more support in NE Hillsborough County and from women than men. Seniors favor traffic signal improvements, and transit improvements are supported in all areas of the County.

The result from a second question indicates what most people see as a balanced solution to traffic. Only about one-in-four residents (23%) are strong advocates for building roads as the only solution to traffic congestion while 30% strongly disagree with this opinion.

## Priority Improvements



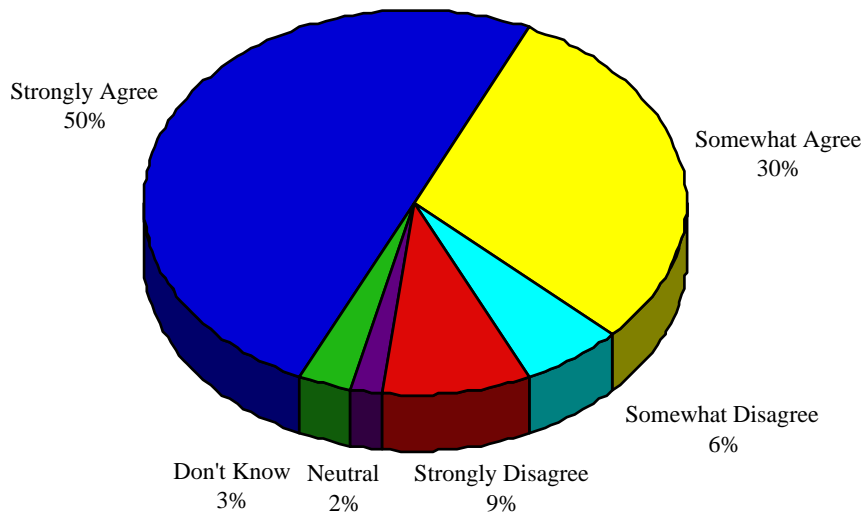
**Building and widening roads is the only solution to traffic congestion**



**Money Spent on Public Transit is Seen as a Good Investment**

Half of the public strongly agrees that money spent in Hillsborough County is a good investment. This view is evident in every area of the County and among all income groups. People age 18-25 have the strongest views while seniors have a slightly lower opinion of transit as a good investment.

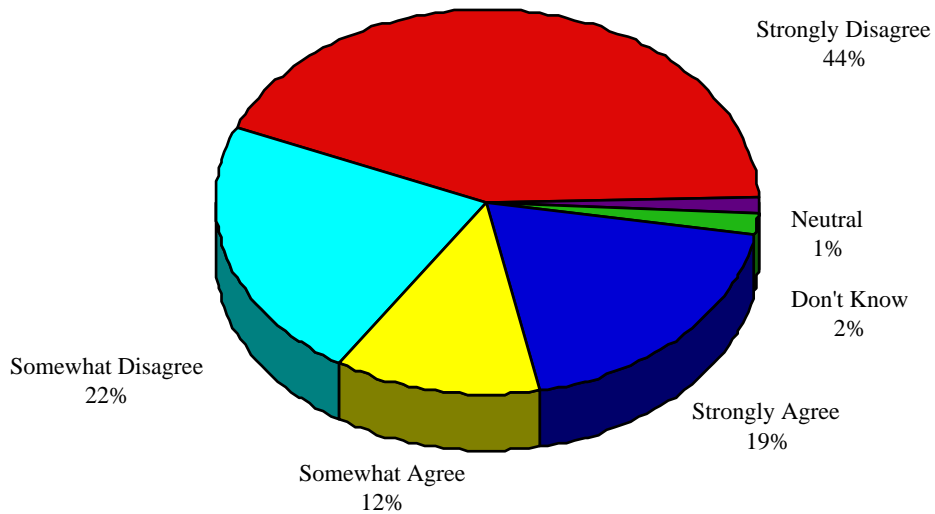
**Transit as Good Investment**



**Public Transit Should Be For Everyone**

Most of the public (66%) sees public transit as a service that should appeal to all citizens regardless of their ability to drive or afford a car. This opinion is held by most citizens with (the exception of some seniors), people who reside in all areas of the county and people at all income levels.

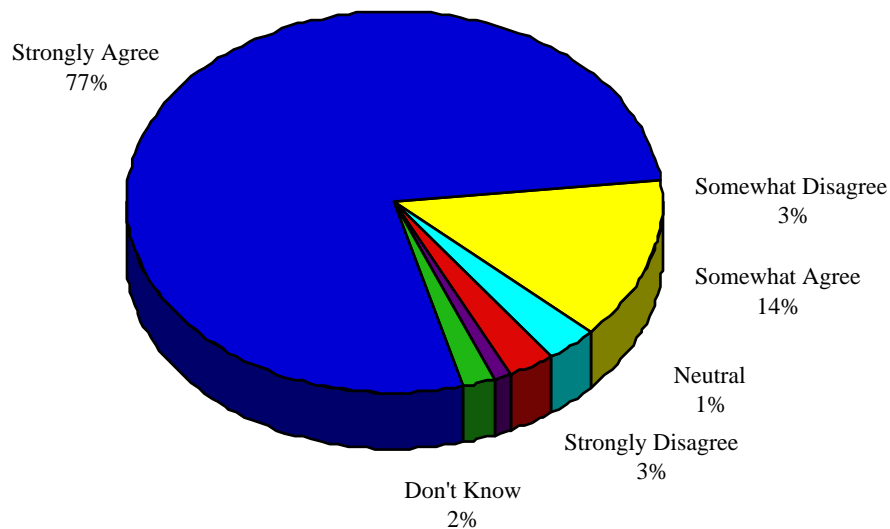
**Public Transit is Just for Those that Cannot Afford a Car or Who Cannot Drive**



**Transit Must be Viewed as an Effective Tool in Managing the Region's Growth**

An effective public transit system provides a number of benefits to the community including greater mobility, improved air quality and energy conservation. For Hillsborough County residents, transit service must be seen as one of the strategies for managing the explosive growth experienced in the region. People see the ability to manage growth effectively as the key to retaining the high quality of life residents currently enjoy.

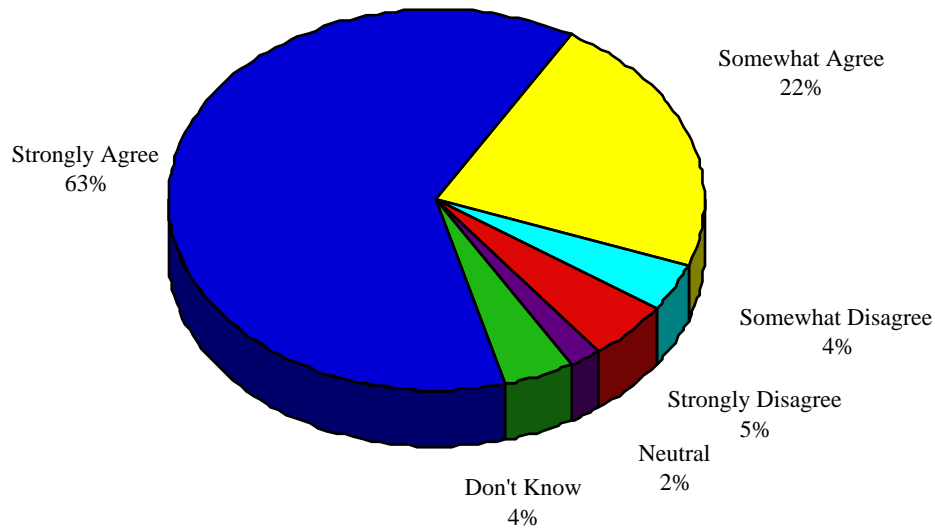
**If we don't manage growth properly the quality of life in the area will decline**



## Most Citizens Recognize Downtown Tampa as Important to the Economic Health of the Region

More than eight-in-ten agree that downtown Tampa is important to the region's economic health. Support for this opinion is shown in every part of the County.

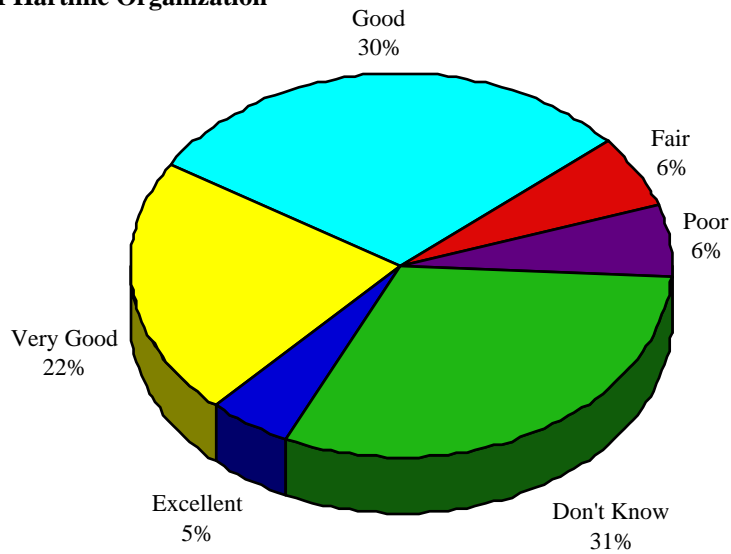
### Downtown Tampa is Important to the Economic Vitality of the Region



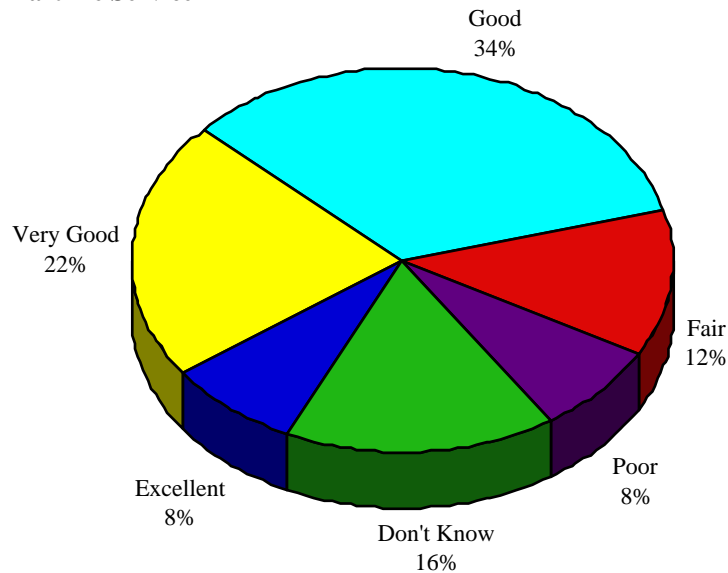
## Most People View Hartline Positively

When asked to provide an overall opinion of the Hartline organization, nearly 60% view it as positive with 27% providing a very positive rating. Few rate it as poor and nearly one-in-three do not know enough of the organization to provide an opinion. Most people view the organization as well-managed (66%), fiscally responsible (62%) and customer oriented (67%). In each case approximately 9% to 12% do not view the organization in that manner, and the remainder do not know.

### Opinion of Hartline Organization



### Opinion of Hartline Service



### Many People are Interested in Riding Hartline to Work

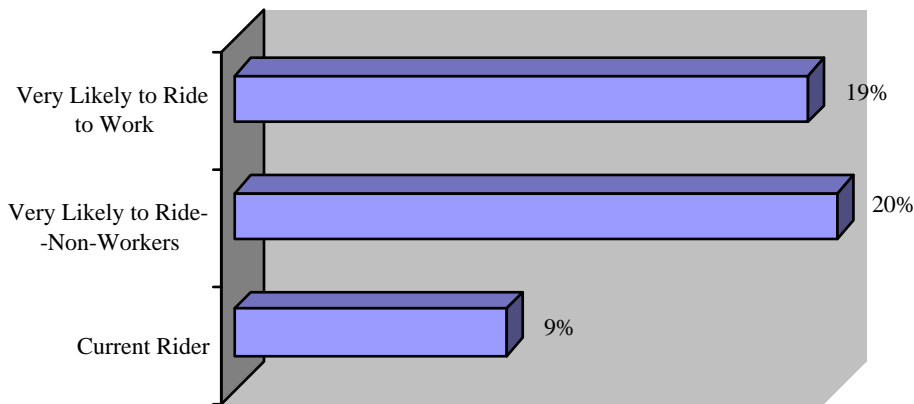
Presently, about one in ten adults have recently used Hartline service to travel to work school, shopping or other reasons. The market for increasing ridership consists of commuters (60% of the adult population) and non-workers.

Examination of the needs and preferences of commuters indicates a sizable portion of the are willing to begin riding if Hartline made improvements. This includes those commuters who are Very Willing (19% of no-riding commuters) and an additional 30% who would be Somewhat Willing. This represents a large potential market for Hartline service in both the near term and the future, if improvements are made.

Similar interest in riding is shown by non-commuters, but the size of this market is smaller because fewer trips would be made.

Investigation of the potential rider group's employment circumstances shows a large percentage of the group have work styles that relate well to transit service operations and marketing. For example, 46% work a fixed schedule (the same day after day) and over 50% have a long commute, defined as 30 or more minutes one way to work. Also many work for a large employer providing some economy of scale for marketing initiatives. Very few, however, pay to park at work.

### Hartline Market Potential



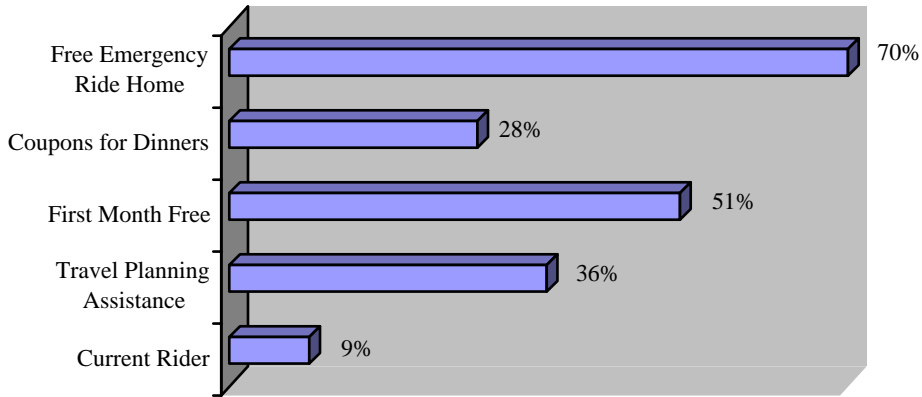
### Potential Customers Define Hartline Service Broadly

When potential customers are asked to define how Hartline can best meet their needs, the response indicates transit service is defined much more broadly than the commonly accepted routings and departure times. Service is defined by a range of elements inclusive of on-time performance, shelter at the stop, security of a car parked at a Park and Ride lot, and perceptions of cleanliness, safety and fellow customers. Cost is the least important consideration.

### Incentives Will Motivate Action

Several marketing incentives were tested with prospective customers in order to determine their influence in enticing new riders. The results show that incentives relating directly to service enhancement are the best. Those that do not relate directly to transit are least favored. The guaranteed ride home incentive relates directly to a service-related need, when taking the bus, people want a way home in case of a personal emergency. Their expectation is that such an incentive should be part of the service package presented to prospective customers to move them from their car to the bus.

### Influence of Incentives



### Prospective Riders Demographics

Commuters who are very interested riding Hartline to work are more likely female, Caucasian and reside in every area of the County. As many in this group have household incomes below \$40,000 as above \$75,000.

### Potential Rider Demographics (Commuters)

