



My say for tomorrow's community. My One Bay.

General Overview & Findings

Updated October 30, 2008

About ONE BAY & Voice It!

ONE BAY (www.myOneBay.com) is a diverse partnership of five regional organizations — working in tandem with the private, public, and nonprofit sectors and citizenry of the seven-county Tampa Bay Region — aligned to develop a regional vision that will help realize a sustainable, high-quality Tampa Bay region for decades. A unified vision for quality and sustainable growth is critical to meet the needs of the 3.2 million new Tampa Bay region residents expected by the year 2050.

The **purpose** of **ONE BAY's Voice It! campaign** is to discover, compile, and detail information from people living and working in the Tampa Bay region to aid policy makers and community leaders in their decision-making on how to protect, promote, and ensure a sustainable, high-quality Tampa Bay region through the upcoming decades of projected growth and development. One goal of ONE BAY is to ensure that everyone who lives in the Tampa Bay region has the opportunity to participate in shaping the region's vision and ultimate future.

- **Five regional organizations comprise the equal partnership of ONE BAY:** Southwest Florida Water Management Water District, Tampa Bay Estuary Program, Tampa Bay Regional Planning Council, Tampa Bay Partnership Regional Research & Education Foundation, and Urban Land Institute Tampa Bay District Council.
- **The ONE BAY Leadership:** ONE BAY chair is **Dan Mahurin**, Tampa Bay Partnership Regional Research & Education Foundation chair and **SunTrust Bank Tampa Bay** chairman, president & CEO. Joining Mr. Mahurin on the ONE BAY Executive Committee are: **David Moore**, Southwest Florida Management District executive director; **Holly Greening**, Tampa Bay Estuary Program executive director; **Stuart Rogel**, Tampa Bay Partnership president & CEO; and **Scott Shimberg**, Urban Land Institute Tampa Bay District Council chair.
- **Seven counties of the Tampa Bay region:** Hernando, Hillsborough, Pasco, Pinellas, Polk, Manatee, and Sarasota.

ONE BAY: A public process

1. **Reality Check** (Spring 2007)
2. **Reality Check: County-by-County** (Fall 2007)
3. **Voice It!** (Summer 2008)
4. **Voice It!: A presentation of findings** (Winter 2009)
5. **ONE BAY “vision”** (Mid-2009)

Reality Check (Spring 2007, Fall 2007)

The one-day Reality Check event at the Tampa Convention Center in Spring 2007 brought together citizens from across the Tampa Bay region to interactively work in sync to allocate housing, jobs, and transportation options to support the 3.2 million new residents expected to live in the Tampa Bay region by the year 2050. More than 300 people — representing the private, public, and nonprofit sectors — used Lego® blocks and colored ribbons to illustrate options for future residential and commercial development and various methods of community connectivity. Reality Check virtual communities were “built” based on priorities citizens determined were most important for the overall good of the region. Reality Check was the foundation for the formation of ONE BAY in its current form.

Following the success of the initial Reality Check in Spring 2007, a series of Reality Check events were held that Fall in each of the Tampa Bay region’s seven counties; gaining input from an additional 700 community representatives.

Findings: In all, 1,000 people expressed their vision and priorities for Tampa Bay’s next 40 years. These priorities, referred to as Guiding Principles, focus on:

- Clustering higher-density developments around transportation corridors
- Maximizing mobility using multi-modal transportation
- Preserving natural resources
- Balancing jobs and housing for affordable quality of life
- Attracting higher-paying jobs & strengthening economic-development initiatives
- Preserving farmland and sustaining the role of agriculture

The input received through all Reality Check events served as the foundation for the ONE BAY technical team’s development of four distinct scenarios exploring the consequences of potential growth patterns of the Tampa Bay region. All four scenarios accommodate the 3.2 million new residents expected to live in the Tampa Bay region by 2050, including the 1.6 million new jobs and 1.3 million new homes anticipated to meet the needs associated with this population increase.

Voice It! Campaign (Summer 2008)

The Voice It! campaign focused on obtaining public input surrounding the Guiding Principles identified as a result of the 15 Reality Check workshops held across the region with a total of 1,000 participants. Campaign promotion included 70 presentations to more than 3,500 people living and working in the seven-county Tampa Bay region; an extensive viral marketing campaign; a public service announcement produced by WUSF and aired on ION (during the Tampa Bay Rays home games), Bright

House Network, and Tampa Bay Community Network; and publicity via newspaper editorials, guest columns, and articles; and web links and blogs. Replies to the survey will help to further assess and prioritize tradeoffs and compromises in pursuit of the growth and future development of the Tampa Bay region, in addition to promoting a community's engagement for successful in long-range planning.

The **four scenarios under review by the public are conceptual** and serve to illustrate the Guiding Principles, previously identified, in a variety of land-use patterns and development.

- **Scenario A:** "Business-as-usual;" describes how the region may look if current growth patterns continue to exist through the year 2050. In this alternative, the growth continues to be in suburban communities with single-family homes and doubles the amount of developed land. The average commute becomes longer and up to 200,000 acres of wetlands and wildlife habitat may be adversely affected.
- **Scenario B:** Derived specifically from the Reality Check workshops. Compared to Scenario A, this alternative quadruples the space of revitalized properties in and near city centers, with an increased focus on alternative housing such as town homes, garden apartments, homes above retail stores in mixed-use buildings and mid/high-rise condominiums taking advantage of waterfront views or proximity to regional activity centers. As the population density increased, enhanced rail and transit options become increasingly viable.
- **Scenario C:** Emphasizes compact design that encourages mass transit. Existing and new towns located near transit stations designed to minimize dependency on automobiles. Generous parks and outdoor recreational areas easily accessible in these new neighborhoods, along with schools and community-activity centers. The most preservation of open space would exist, compared to the other three scenarios, with more redevelopment in and near city cores.
- **Scenario D:** Focuses on the preservation of water resources and wildlife habitat. Construction in areas defined as wetlands, aquifer recharge areas and priority habitat avoided. Approximately 24,000 acres revitalized as new mixed-use communities near downtown cores. And, less than 500 acres of wetlands or priority habitat threatened with new development.

Findings: As of October 27, 2008 **3,431 people responded to the on-line survey** during the period of **June through October 2008**. The survey, taking anywhere from approximately 2 to 20 minutes to complete, asked respondents for their input and opinions on the four scenarios of potential growth patterns of the Tampa Bay region through 20 values-oriented and demographic questions.

Demographics of survey respondents

- The percentage of **responses from each county** in the Tampa Bay region ran parallel with the census distribution for the Tampa Bay region, with the exception of Polk and Sarasota counties where fewer than the projected responses were received.

<u>County of residence</u>	<u>% of survey respondents*</u>	<u>as a % of total region**</u>
Hernando	4.3%	4.2%
Hillsborough	42.0%	29.5%
Manatee	10.4%	7.9%
Pasco	14.5%	11.6%
Pinellas	20.4%	23.0%
Polk	3.1%	14.4%
Sarasota	4.3%	9.3%
Other	1.0%	n/a

* Results as of 10/20/08; ** U.S. Census, 2007 estimates

- By **gender**, 52.2 percent of the respondents are female, 47.8 percent are male.

- By **age**:

<u>Age</u>	<u>% of survey respondents</u>	<u>as a % of total region*</u>
Less than 18 years	10.9%	21.4%
18 to 24 years	7.0%	8.0%
25 to 39 years	26.7%	18.8%
40 to 59 years	42.8%	27.2%
60 years & older	12.6%	24.5%

* Results as of 10/20/08; ** U.S. Census, 2007 estimates

- By **race/ethnicity**:

<u>Race/ethnicity</u>	<u>% of survey respondents</u>	<u>as a % of total region*</u>
African-American	5.0%	11.2%
Asian	1.2%	2.3%
Hispanic	9.0%	13.7%
White, not Hispanic	75.7%	72.1%
Other	2.9%	0.7%
Prefer not to answer	6.1%	n/a

* Results as of 10/20/08; ** U.S. Census, 2007 estimates

Survey findings

The scenario illustrations were presented to help convey the cause/effect relationship of different land use patterns on transportation options, environmental issues, preserving drinking water resources, preservation of agricultural land, the location of jobs vs. housing, and future housing options. They are conceptual, not “a plan” for the future land uses of the Tampa Bay region. A detailed compilation and analysis of the survey findings will be available on-line, www.myOneBay.com, December 2008.

A very general review:

- More than 50 percent of the respondents (54%) identified Scenario C as the scenario selected that **“best reflects own overall values;”** followed by a “blend of scenarios” (17%), Scenario D (15%), Scenario B (10%), and Scenario A (4%).

- Respondents were asked to select a scenario that:
 - Best provides the **transportation options** that you would like to have within the region; 72.7% selected Scenario C.
 - Best addresses your level of concern about **environmental issues**; 46.2% selected Scenario C.
 - Provides the highest potential for **preserving drinking water resources**; 59.7% selected Scenario C.
 - Best reflects your level of concern for **preservation of agricultural land**; 61.5% selected Scenario C.
 - Could best **locate jobs close to where employees live**; 62.6% selected Scenario C.
 - Provides the best **future housing options**; 51.4% selected Scenario C.
 - Best reflects your **vision for land use patterns** with the region; 59.5% selected Scenario C.

- Respondents were asked rate the **importance of the issue**:
 - **Transportation options**
 - High: 62.3%
 - Medium: 32.9%
 - Low: 4.8%
 - **Environmental issues**
 - High: 65.1%
 - Medium: 30.5%
 - Low: 4.4%
 - **Preserving drinking water resources**
 - High: 68.3%
 - Medium: 28.1%
 - Low: 3.6%
 - **Preservation of agricultural land**
 - High: 40.3%
 - Medium: 46.4%
 - Low: 13.3%
 - **Proximity of jobs vs. housing**
 - High: 56.2%
 - Medium: 37.3%
 - Low: 6.6%
 - **Future housing options**
 - High: 48.9%
 - Medium: 42.0%
 - Low: 9.1%

- **Mass transit, cost of living, and employment** were selected by respondents as the top three **most important issues for the future of the Tampa Bay region**. **Mass transit** and **traffic congestion**, combined, accounted for more than 60 percent of the responses. The most important issues for the future, as per the respondents, in order of importance:

- **Mass transit**
 - **Cost of living**
 - **Employment**
 - Natural resource conservation
 - Public education
 - Water availability
 - Traffic congestion
 - Water quality
 - Energy
 - Healthcare
 - Parks/open space
 - Air quality
 - Housing choices
 - Public safety
 - Farm land preservation
 - Other
- **Mass transit** was the one, **most immediate issue requiring attention**, with more than 25 percent of the responses selecting this issue. The most immediate issue requiring attention, as per the respondents, in order of importance:
- **Mass transit**
 - Cost of living
 - Traffic congestion
 - Employment
 - Public education
 - Natural resource conservation
 - Water availability
 - Energy
 - Healthcare
 - Other
 - Water quality
 - Housing choices
 - Air quality
 - Farm land preservation
 - Public safety
 - Parks/open space
- Two, open-ended questions provided respondents with unrestricted access to opine about the topics introduced throughout the survey instrument. More than 50 percent of the respondents provided comments to one, or both, of the questions. The comments included a wide variety of topics and are currently being compiled for a detailed presentation to the public.



A detailed compilation and analysis of the survey findings will be available on-line, www.myOneBay.com, December 2008. For more information, contact info@myOneBay.com.