



# Transit Oriented Development

City Commission Workshop February 10, 2011

# Agenda

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- ▶ What is Transit Oriented Development (TOD)
- ▶ National TOD Trend
  - ▶ TOD – Planning for the future
- ▶ Regional TOD Need
  - ▶ Tampa Bay Area Regional Transportation Authority (TBARTA) Plan
- ▶ Dunedin TOD Potential
  - ▶ Population, new housing units, office space needs, retail trends
  - ▶ Retrofitting corridors – TOD locations
- ▶ Questions / comments
  - ▶ Staff recommendations



# TOD Defined

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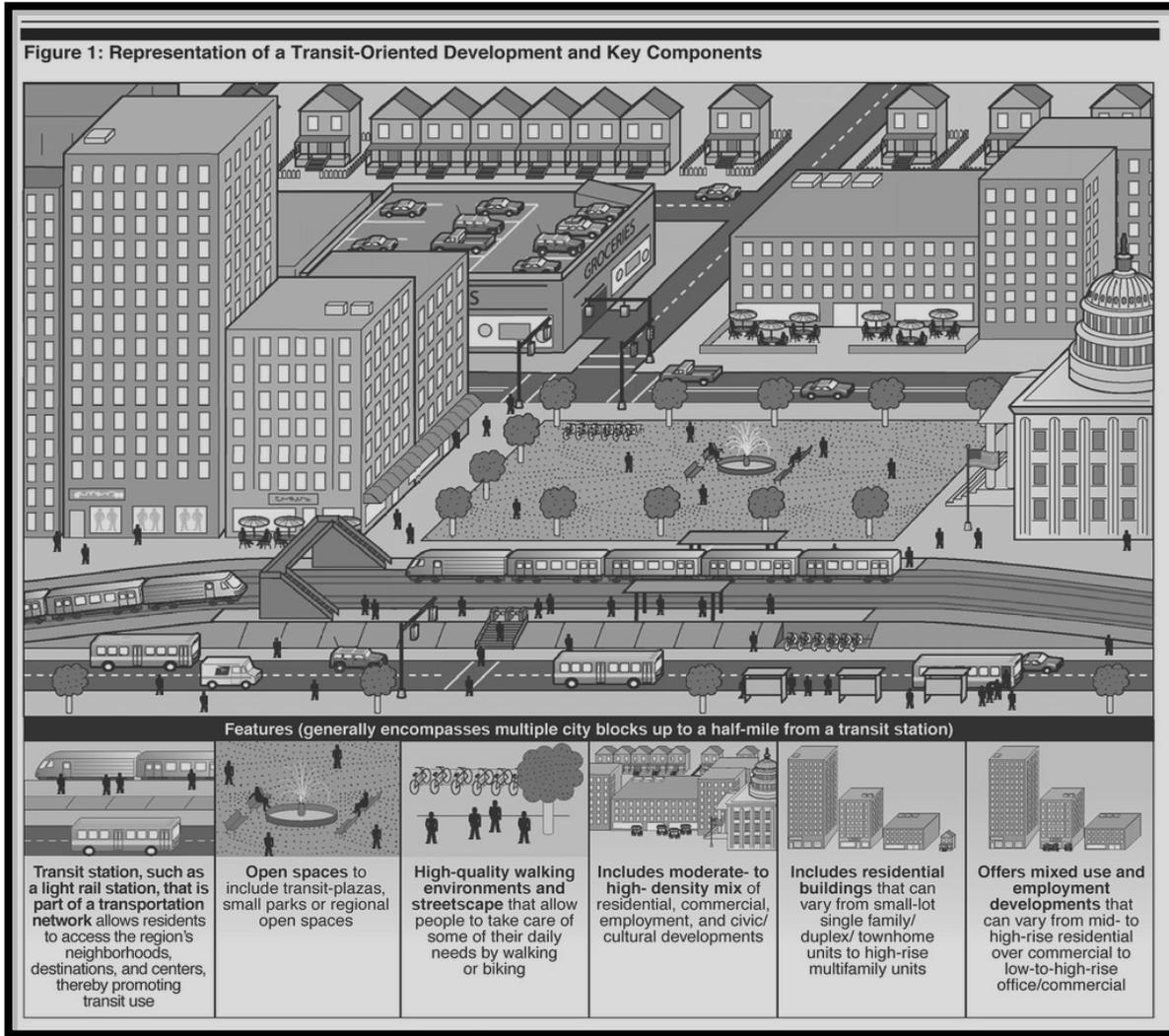
“Transit-Oriented Development (TOD) is moderate to higher-density development, located within an easy walk of a major transit stop, generally with a mix of residential, employment and shopping opportunities designed for pedestrians, without excluding the automobile.

TOD can be new development or reconstruction of one or more buildings whose design and orientation facilitate transit use.”

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# Textbook TOD



# National TOD Trend

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TOD is working in the U.S.

Arizona

California

Colorado

Massachusetts

New Jersey

Ohio

Texas

Virginia

Washington



*Pleasant Hill BART Station*



*Hotel and Offices at Pleasant Hill BART*



*Small Shops and Offices at Market Hall near Rockridge Station*



*City Center in Downtown Oakland*



*Walnut Creek's Office District*



# Factors Driving the TOD Trend

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- Rapidly growing traffic congestion nation-wide.
- Growing desire for a quality urban lifestyle.
- Increasing desire for a more walkable lifestyle away from traffic.
- Changes in family structures: more singles, empty-nesters, milleniums,etc.
- Growing national support for Smart Growth.
- New focus of Federal policy to reduce congestion and improve air quality.



# TOD Design Components

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- Walkable design with pedestrians as the highest priority.
- Transit station is the prominent feature of the development.
- A regional node containing a mixture of uses in close proximity including office, residential, retail and civic uses.
- High density, high-quality development within 10-minute walk circle surrounding a transit station.
- Other collector support transit systems including trolleys, streetcars, light rail, and buses, etc.
- Reduced / managed parking within ten minutes of the transit station.



# Benefits

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- Better places to live, work, and play.
- Greater mobility with ease of connection.
- Increased transit ridership.
- Reduced traffic congestion.
- Reduced household spending on transportation, resulting in more affordable housing.
- Increased foot traffic and customers for area businesses.
- Reduced dependence on foreign oil.
- Significantly reduced pollution and green field destruction.
- Reduced incentive to sprawl, increased incentive for compact development.
- Less expensive than building roads and other infrastructure.



# National to Regional

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- ▶ Transition to the region.
  - ▶ Like many major metropolitan areas, the Tampa Bay region is facing increasing traffic congestion, sprawl, longer commute times and increasing air pollution.
  - ▶ In response to these concerns, a regional transportation authority has been formed to find solutions to the region's future transportation needs.
    - ▶ TOD is one of the solutions.
  - ▶ TOD adopted by other County Agencies
    - ▶ Pinellas County MPO
    - ▶ Pinellas Planning Council
    - ▶ Pinellas County Planning Department



# Regional TOD Need

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# Tampa Bay Area Regional Transportation Authority (TBARTA)



## **A Connected Region for Our Future**

Tampa Bay Area Regional Transportation Authority Master Plan Vision

Adopted May 22, 2009

# Regional Need

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- ▶ Over the past three decades, population in Tampa Bay has more than doubled, employment has more than tripled, and 50 percent of our developable land has been built out. During that same period, the delay we experience in commute time has more than doubled.
- ▶ Our area's rapid, sprawling growth has resulted in dispersed employment centers, massive suburban development, and a transportation system with few options. Residents often drive alone -- overloading the roadways that link our suburban areas.



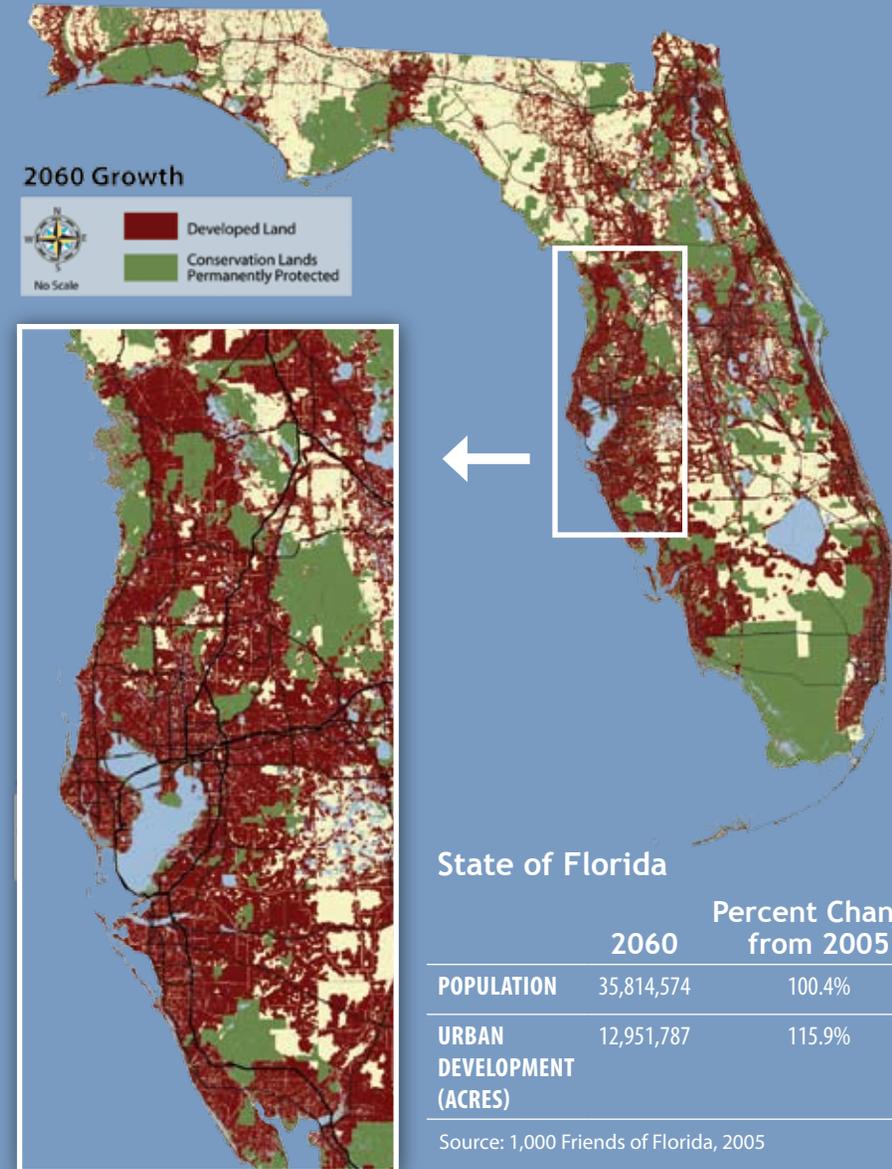
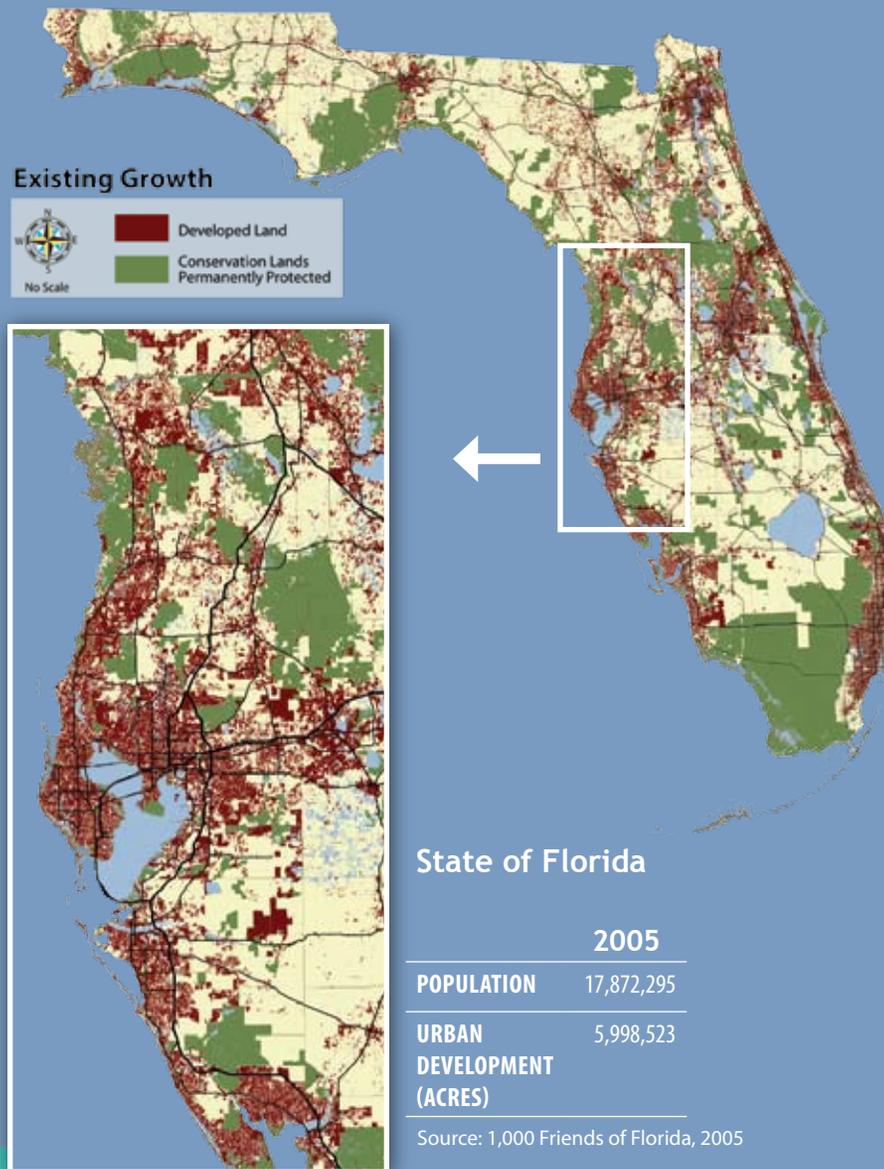
# TBARTA Projections

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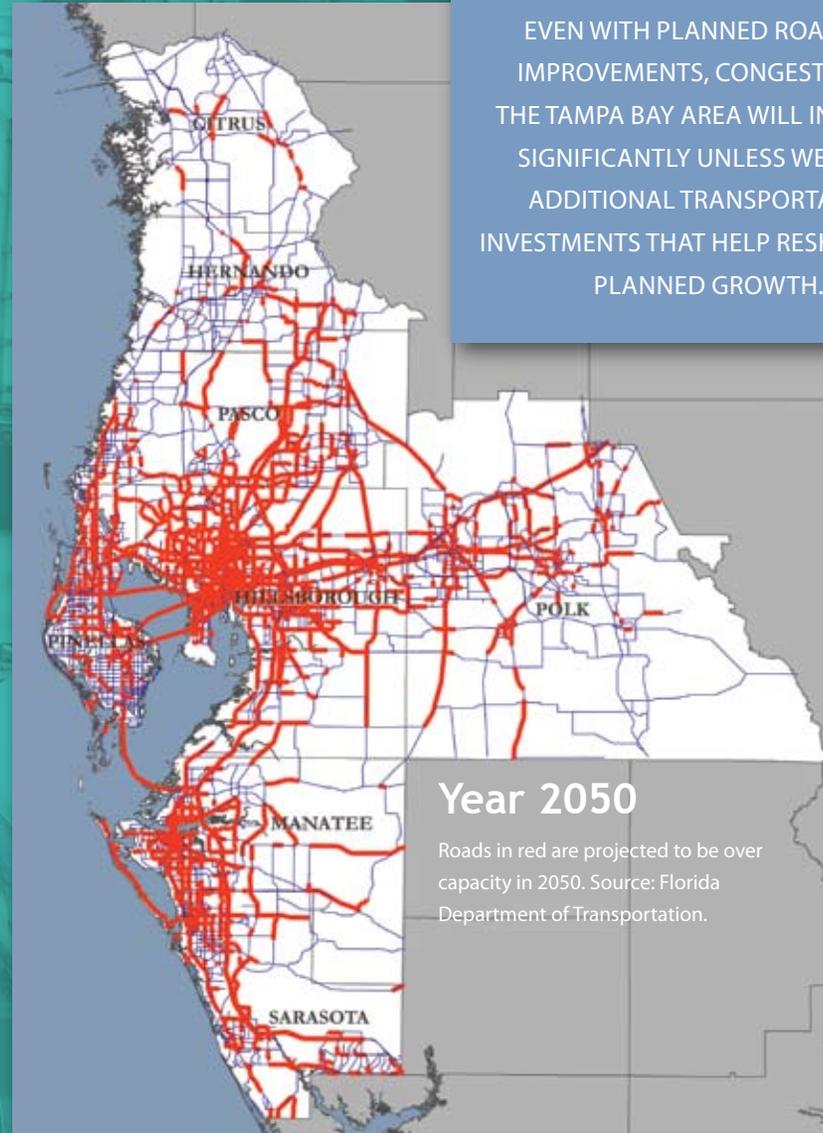
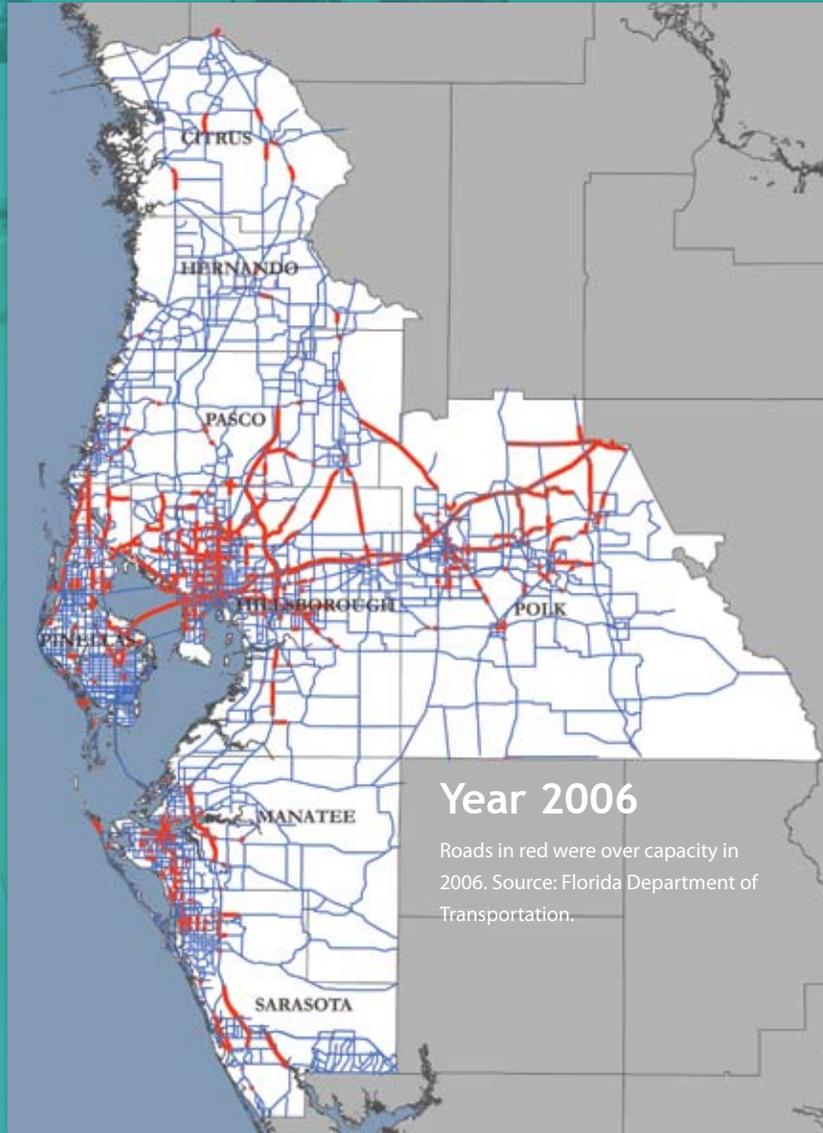
- ▶ We expect to see an additional 1.8 million new residents in our area by 2035.
- ▶ By 2050, our population and employment is projected to nearly double again and another 20 percent of our land will be developed, leaving only 30 percent of developable land for future growth.
- ▶ As our region grows, commute times, travel costs, and congestion will continue to increase exponentially.
- ▶ Compared to what we have today, traffic congestion in 2035 is expected to more than double, and to triple by 2050.



# What Would Happen If We Continue to Develop Land at the Same Pace and in the Same Manner as We Have in the Past?



# Severely Congested Roadways in 2006 and 2050



EVEN WITH PLANNED ROADWAY IMPROVEMENTS, CONGESTION IN THE TAMPA BAY AREA WILL INCREASE SIGNIFICANTLY UNLESS WE MAKE ADDITIONAL TRANSPORTATION INVESTMENTS THAT HELP RESHAPE OUR PLANNED GROWTH.

# Transportation and Land Use: Our Future

The TBARTA Master Plan analysis also examined transportation's relationship with land use. Where people live, work, shop, and play influences where and how they travel. **As our area continues to grow, identifying regional destinations, such as population and employment centers, is critical to understanding where transportation improvements and connections need to occur.** It is also important to identify tourism areas; clusters of special uses such as sporting venues, universities, and medical centers, each of which generate high volumes of traffic; as well as areas that are ripe for redevelopment such as older malls or vacant commercial centers.



Charlotte (above) and Dallas (below) TOD.

**Transit Oriented Development (TOD) around transportation hubs is a way to create more liveable, walkable neighborhoods by coupling a transit connection with a mix of nearby offices, retail, and housing.** By focusing many of our daily activities within a quarter to half mile of a rail or major bus transit station, we can enjoy a lifestyle with fewer car trips. TOD can work in a whole range of communities, not just in high-density urban areas. Even modest increases in housing or job density near stations can help boost transit ridership and create economic benefits.



San Diego TOD.

**To ensure that the regional transportation system will serve our residents and visitors, TBARTA will continue to work with the local governments.** The local Comprehensive Plans depict where future growth is desired and identify the location and significance of regional destinations in the future. As local communities adjust their plans, the TBARTA Master Plan will also evolve to meet their desires.

# A Balanced, Multimodal System

Several transportation types were considered and evaluated. Those included in the Regional Networks are:



Mode	What is it?	What are some examples?	How far apart are the stations, typically?	How often does a vehicle come, typically?	What is the average speed with stops?
<b>Short-Distance Bus</b>	Frequent service with a limited number of stops. Buses can travel in mixed traffic with cars, or in lanes dedicated to transit use only	Limited Stop Service, Bus Rapid Transit (BRT)	2 to 4 blocks in urban areas, ½ mile to 3 miles in suburban areas	Every 10 to 20 minutes during peak hours or 30 to 60 minutes at other times of the day	15 to 20 MPH
<b>Long-Distance Bus</b>	Service primarily during morning and evening peak hours with a very limited number of stops. Vehicles usually run on major roadways and can operate in managed lanes	Express Bus	Varies (Can be as much as 5 to 20 miles between stations)	Every 20 to 60 minutes during peak hours or 30 to 60 minutes at other times of the day	25 to 45 MPH
<b>Short-Distance Rail</b>	Frequent service customarily located in urban areas. Vehicles can operate in mixed traffic or in separate right-of-way	Light Rail, Heavy Rail, Streetcar or Trolley, Monorail, or Automated Guideway	½ mile to 1 mile apart	Every 10 minutes or less during peak hours or 15 to 30 minutes at other times of the day	15 to 25 MPH
<b>Long-Distance Rail</b>	Rail service with fewer stops that is intended for peak hour-focused commuter travel	Commuter Rail (Traditional Locomotive, Diesel Multiple Unit, or Electrical Multiple Unit)	5 to 10 miles apart	Every 20 minutes during peak hours or 60 minutes at other times of the day	30 MPH
<b>Managed Lanes</b>	Special lanes on highways and roadways for use by transit vehicles or carpools, or with tolls for other vehicles	High-Occupancy Vehicle (HOV) or High Occupancy Toll (HOT) Lanes	N/A	N/A	60-65 MPH

# A Phased Approach

The Master Plan is designed to provide choices for conveniently moving between home and work, to educational and medical facilities, and to enjoy the area's many recreational, sports, and cultural assets. A better, multi-faceted transportation network will encourage economic development throughout our region, and support redevelopment in communities.

## Timing is Key

The outcome of the planning process is an incremental approach to building a balanced transportation system. **The Master Plan includes a Long-Term Regional Network for 2050 and a Mid-Term Regional Network for 2035.** Both will be complemented by hundreds of miles of local or sub-regional transit services.

The **Long-Term Regional Network for 2050** and beyond features:

- 135 miles of Short-Distance Rail
- 115 miles of Long-Distance Rail
- 42 miles of Bus Rapid Transit in Mixed Traffic
- 220 miles of Managed Lanes with Express Bus
- 217 miles of other Express Bus

The **Mid-Term Regional Network for 2035** focuses on where to begin building the transportation improvements, and consists of the following passenger rail and enhanced bus investments:

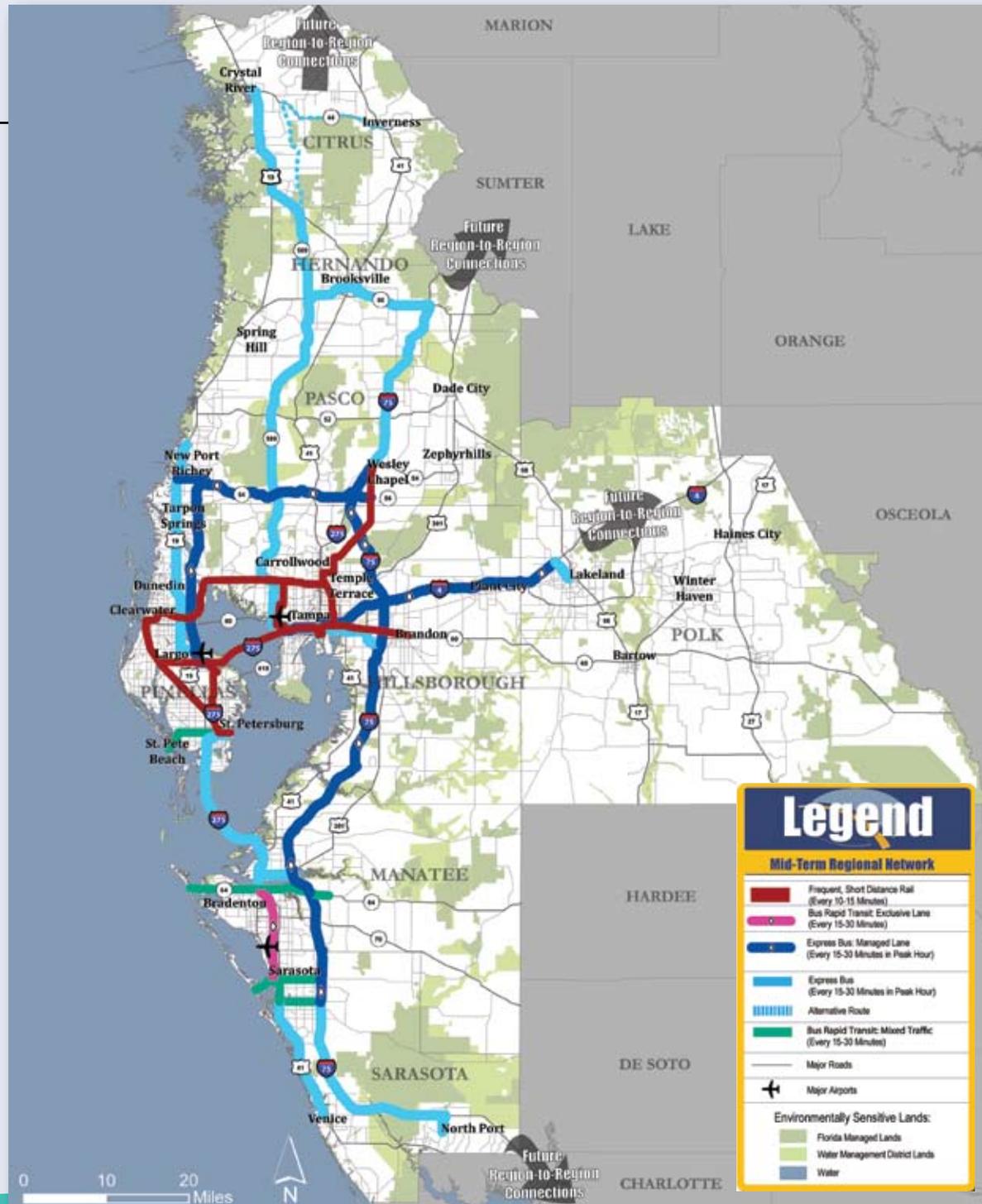
- 116 miles of Short-Distance Rail
- 12 miles of Bus Rapid Transit in Exclusive Lanes
- 42 miles of Bus Rapid Transit in Mixed Traffic
- 159 miles of Managed Lanes with Express Bus
- 226 miles of other Express Bus

The next step is prioritizing the individual projects and studying them individually as we move toward incremental implementation.



# Mid-Term Regional Network (2035)

Focuses on Where We Should Begin



## What the Mid-Term Regional Network Includes:



**Short-Distance Rail** - Probably light rail, to connect regional anchors (116 miles)



**BRT in Exclusive Lanes** - Buses that make limited stops, operating in their own lanes. (12 miles)



**BRT in Mixed Traffic** - Buses that make limited stops, operating in lanes shared with cars. (42 miles)



**Managed Lanes** - Special lanes on highways for buses and carpool vehicles, with tolls for other vehicles. (159 miles)



**Express Bus** - Long-distance service (very few stops), but operating either in Managed Lanes or in mixed-flow traffic on highways and/or major roads. (226 miles)

# Long-Term Regional Network (2050)

Shows What Our Future Can Be

## What the Long-Term Regional Network Includes:



**Short-Distance Rail** - Probably light rail, to connect regional anchors. (135 miles)



**Long-Distance Rail** - Commuter service on rail operating to serve peak commuting hours. (115 miles)



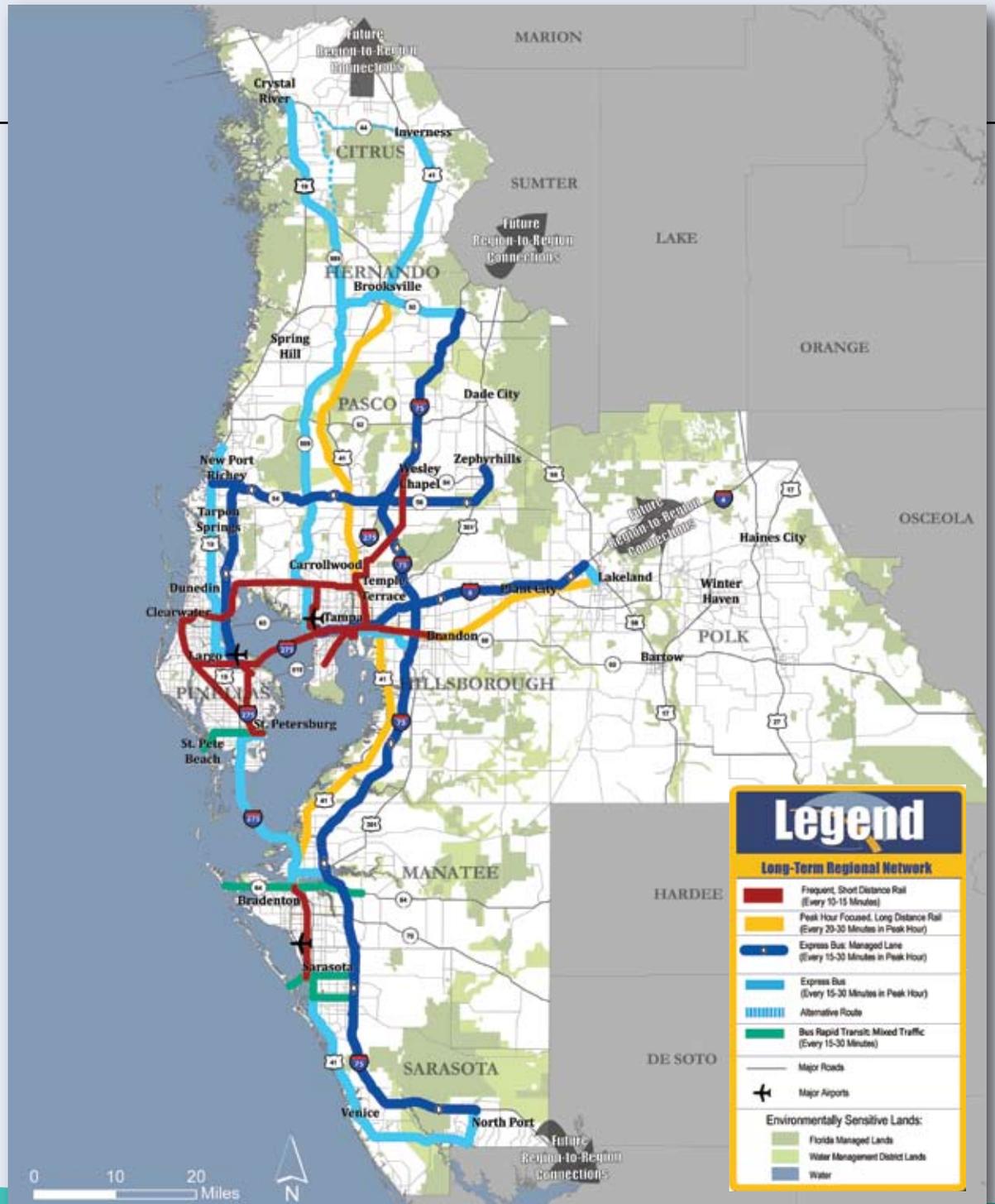
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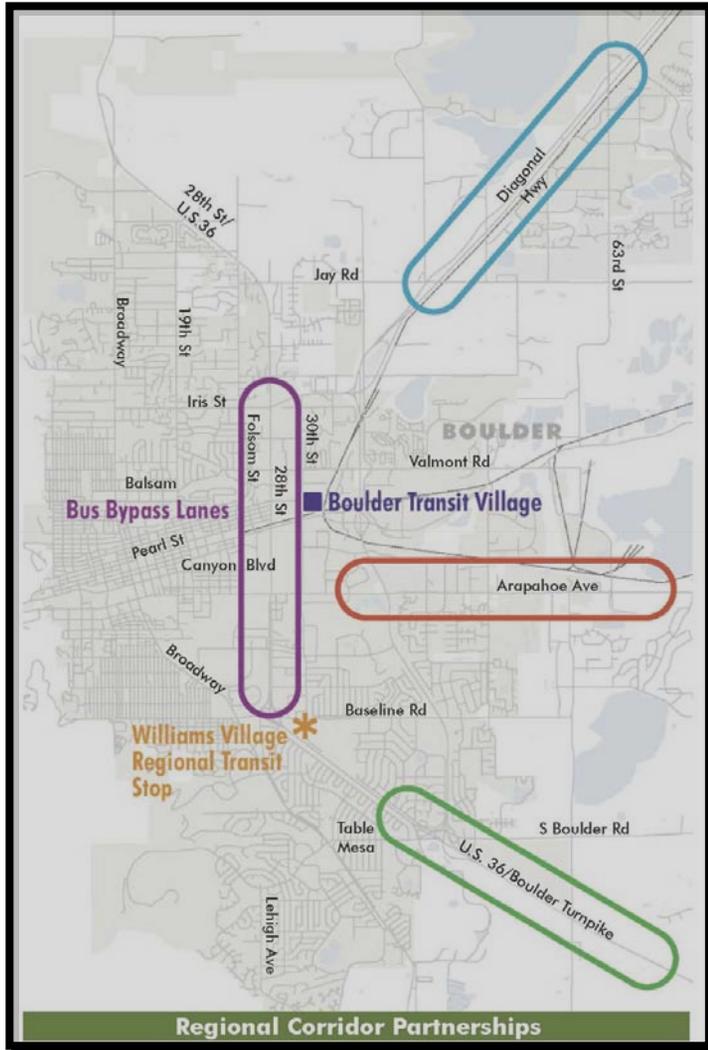
**Managed Lanes** - Special lanes on highways for buses and carpool vehicles, with tolls for other vehicles. (220 miles)



**Express Bus** - Long-distance service (very few stops), but operating either in Managed Lanes or in mixed-flow traffic on highways and/or major roads. (217 miles)



# Regional to Local



- ▶ Transition to Dunedin
  - ▶ How and where do we fit in the region?
  - ▶ Pinellas 2030 will offer opportunities for jobs, housing, retail, office and transit if we lay the groundwork now.
  - ▶ Retrofitting corridors with an emphasis on TOD can be the key to enhanced future growth.

# TOD in Dunedin

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# Projections vs. Opportunities

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- ▶ Population
- ▶ Employment
- ▶ Real Estate
  - ▶ Housing
  - ▶ Office
  - ▶ Retail



# Population Projections

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	2015	2020	2025	2030	Change
Pinellas County	947,413	982,990	1,017,564	1,039,111	91,698
Dunedin	36,706	38,053	39,366	40,174	3,468
Clearwater	111,509	116,057	120,504	123,396	11,887
Largo	83,065	85,811	88,541	90,186	7,121
Safety Harbor	18,065	18,956	19,762	20,265	2,200
Tarpon Springs	24,282	25,810	27,248	28,267	3,985

Source: 2010 Dunedin Causeway Corridor Study

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# Household Income

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	2010	2015	Change
< \$25,000	3,856	3,097	-19.7%
\$25,000 - \$49,999	5,072	4,139	-18.4%
\$50,000 - \$74,999	3,868	4,727	22.2%
\$75,000 - \$99,999	2,264	2,227	-1.6%
\$100,000 - \$149,999	1,625	2,099	29.2%
\$150,000 +	677	815	20.4%
Median HH Income	\$48,185	\$55,306	14.8%
Average HH Income	\$60,290	\$66,810	10.8%

Source: 2010 Dunedin Causeway Corridor Study

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# County Job Growth Forecast (in thousands)

Sector	2010	2015	2020	2025	2030	2010-2030
Agriculture	7.4	7.4	7.5	7.6	7.6	0.2
Mining & Construction	34.6	34.7	34.9	35.0	35.1	0.5
Manufacturing	41.7	41.6	41.5	41.4	41.3	-0.4
Transportation/Communications	18.7	18.9	19.1	19.3	19.5	0.6
Wholesale & Retail Trade	137.2	137.2	139.5	141.9	146.5	9.3
Finance/Insurance/Real Estate	69.0	69.2	69.4	69.5	69.7	0.7
Services	276.0	280.5	284.9	289.3	293.5	17.5
Government	53.2	54.0	54.9	55.7	56.5	3.3
Total	637.9	646.0	654.1	662.0	669.9	32.0
Dunedin Share Maintained (2% of PC)	12.7	12.9	13.0	13.2	13.4	0.7

Source: 2010 Dunedin Causeway Corridor Study

# Office Market Potential

	Scenario One	Scenario Two
2010 Jobs in Dunedin	12,700	12,700
As Share of County Employment	2%	2%
% Office-using Jobs	24%	24%
2010 Office-using Employment	3,048	3,048
Sq Ft Occupancy Factor	198	198
Estimated Current Inventory (Sq Ft)	603,504	603,504
2030 Jobs in Dunedin	13,400	16,700
As Share of County Employment	2.0%	2.5%
% Office-using Jobs	24%	24%
2030 Office-using Employment	3,216	4,008
Sq Ft Occupancy Factor	198	198
Estimated Future Inventory (Sq Ft)	636,768	793,584
Net Gain Office Space 2010-2030	33,264	190,080



# Housing Market Potential

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	2010	2030	Change 2010-2030
Citywide Demand			
Total Units	21,203	23,280	2,077
Current & Assumed 2030 Vacancy	9.8%	5.0%	
Vacant Units	2,071	1,164	
Occupied Housing Units	19,132	22,116	
Demand Met by Existing Housing Units			913
Net Gain-New Housing Units			1,164

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# Retail Market Capture Potential

Retail Category	Demand (HH Spending)	Supply (Store Sales)	Untapped Spending
Apparel & Accessories	\$51,029,271	\$9,009,612	\$42,019,659
Furniture & Home Furnishings	32,205,019	14,460,121	17,744,898
Electronics & Appliances	24,279,244	5,739,302	18,539,942
Leisure & Entertainment	25,742,080	9,658,260	16,083,820
Grocery & Liquor	169,655,216	135,251,770	34,403,446
Health & Personal Care	100,280,998	45,016,417	55,264,581
Building Material/Garden Equip.	15,136,357	7,582,407	7,553,950
All Other Merchandise	33,982,705	15,378,828	18,603,877
<b>Totals</b>	<b>\$452,310,890</b>	<b>\$242,096,717</b>	<b>\$210,214,173</b>

Source: 2010 Dunedin Causeway Corridor Study



# Quick Review

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## ▶ Summary

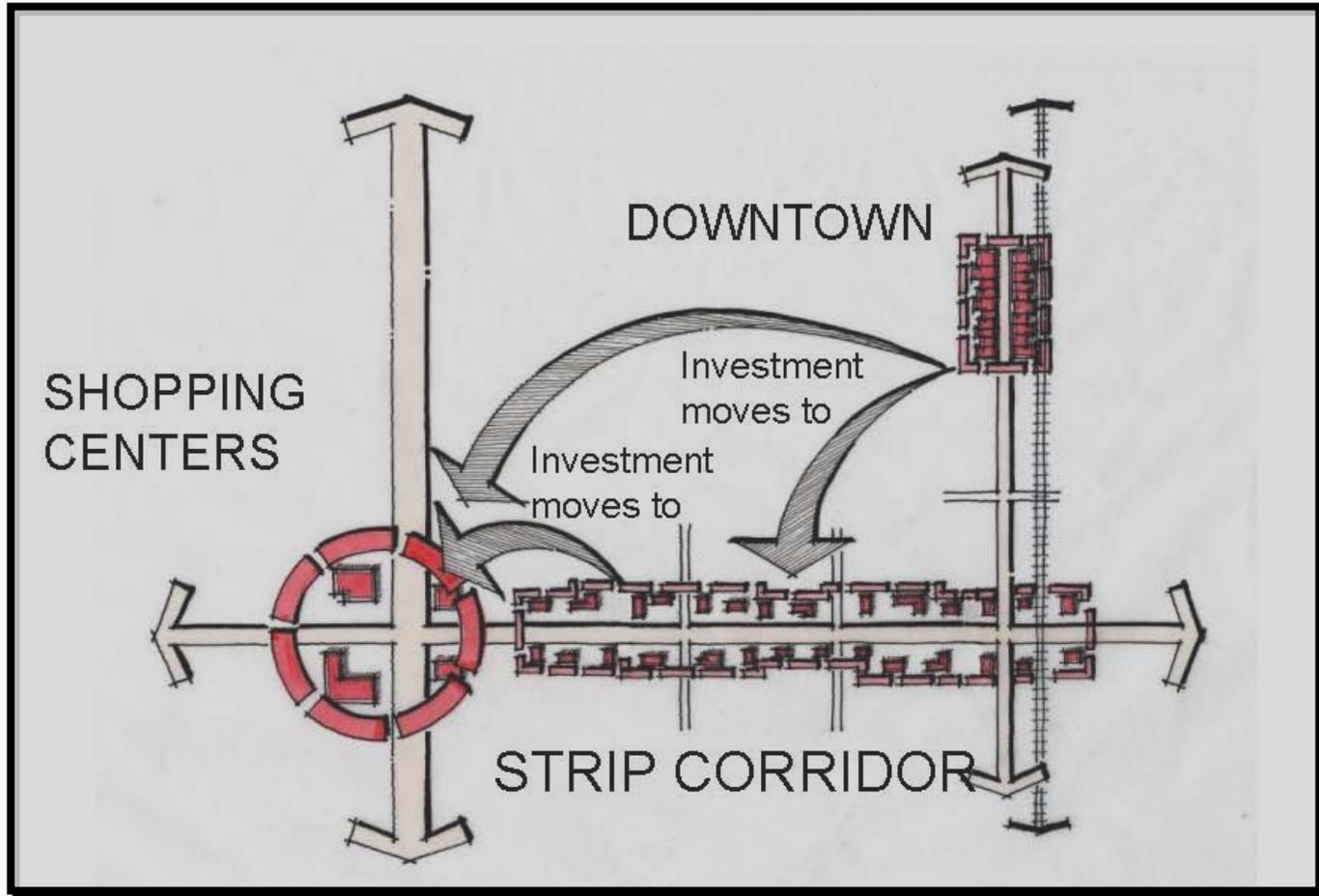
- ▶ TOD is underway.
- ▶ TOD is supported by the region.
- ▶ One TOD center can be the difference.
  - ▶ Increased employment
  - ▶ Higher demand for office space and housing
  - ▶ Move national retailers from US 19 to inside the City

## ▶ Can it work in Dunedin?



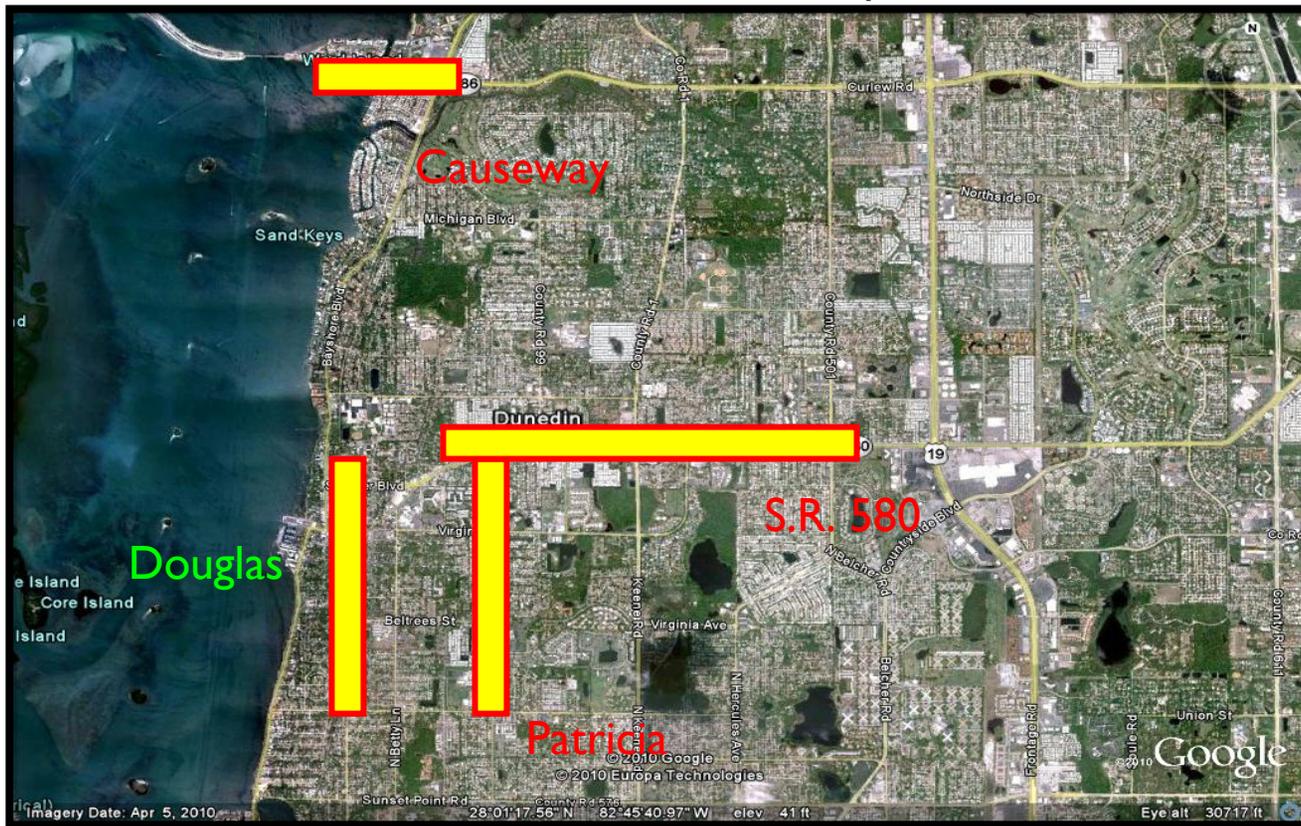
# Development Timeline

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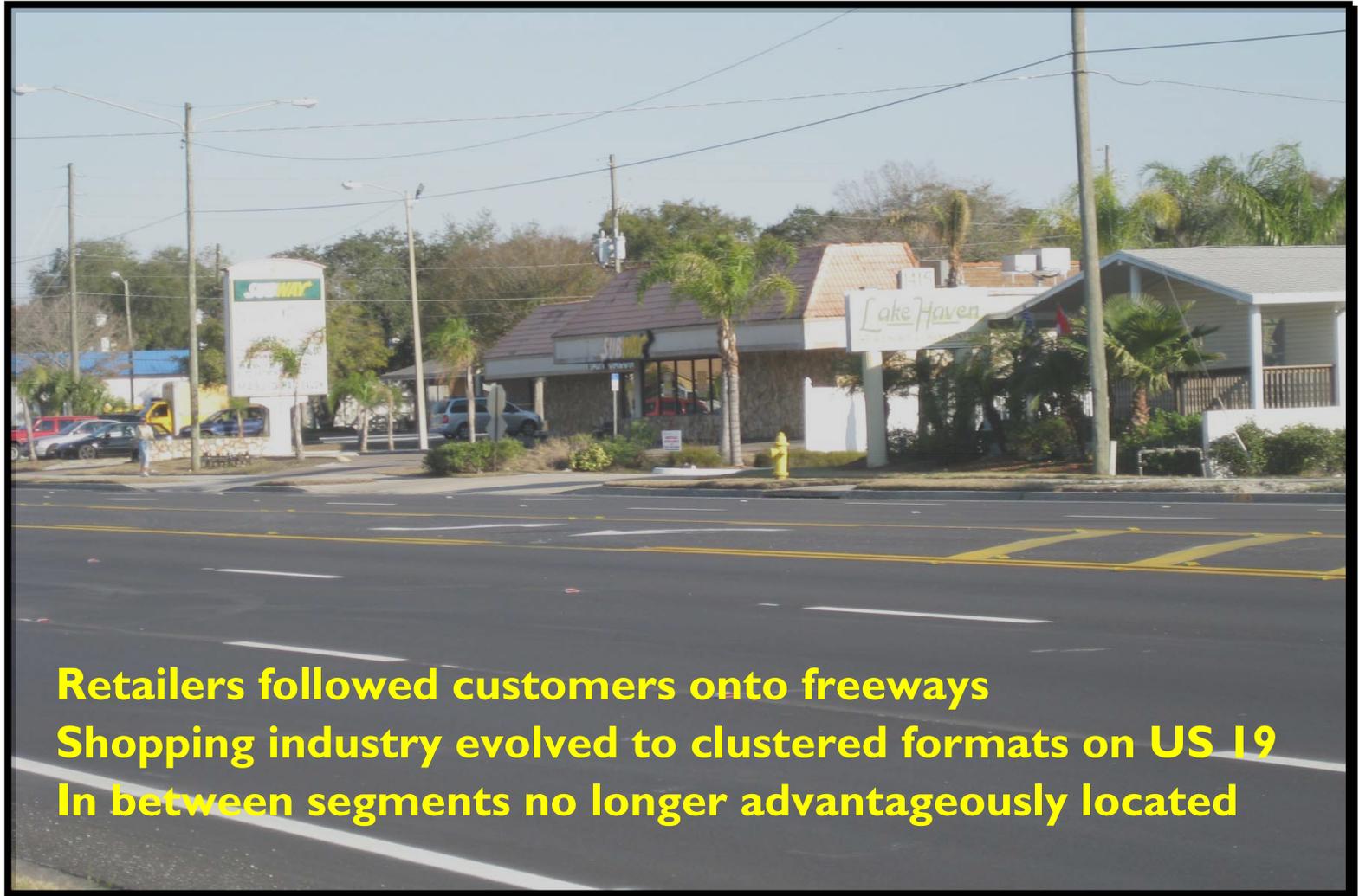
# Retrofitting Corridors

- ▶ Corridors are a major change area in cities
- ▶ Artifact of pre-freeway pattern
- ▶ Retailers seek visibility and access
- ▶ Business left train-focused downtowns to linear strips



# Current Corridors

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**Retailers followed customers onto freeways**  
**Shopping industry evolved to clustered formats on US 19**  
**In between segments no longer advantageously located**



# Commercial and Retail Issues

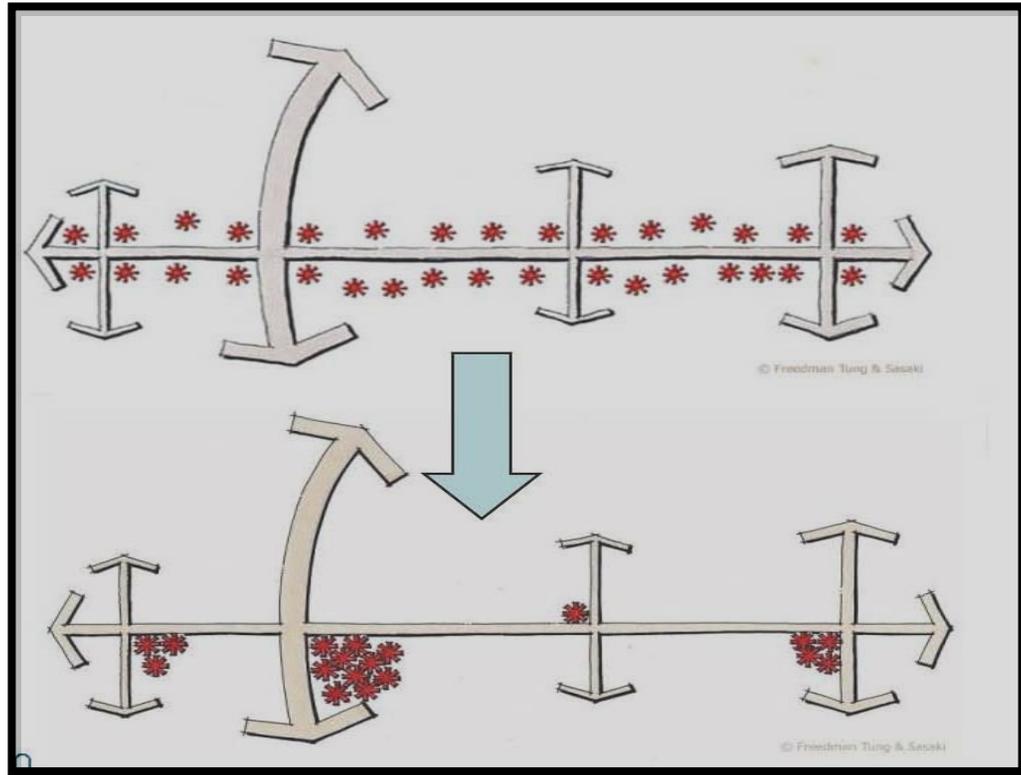


**Our suburban strips**  
**Most visible**  
**Bad habits (traffic noise, no walking, placeless)**  
**Reflects poorly on community**  
**Can't compete with big box centers**

# Physical Transformation

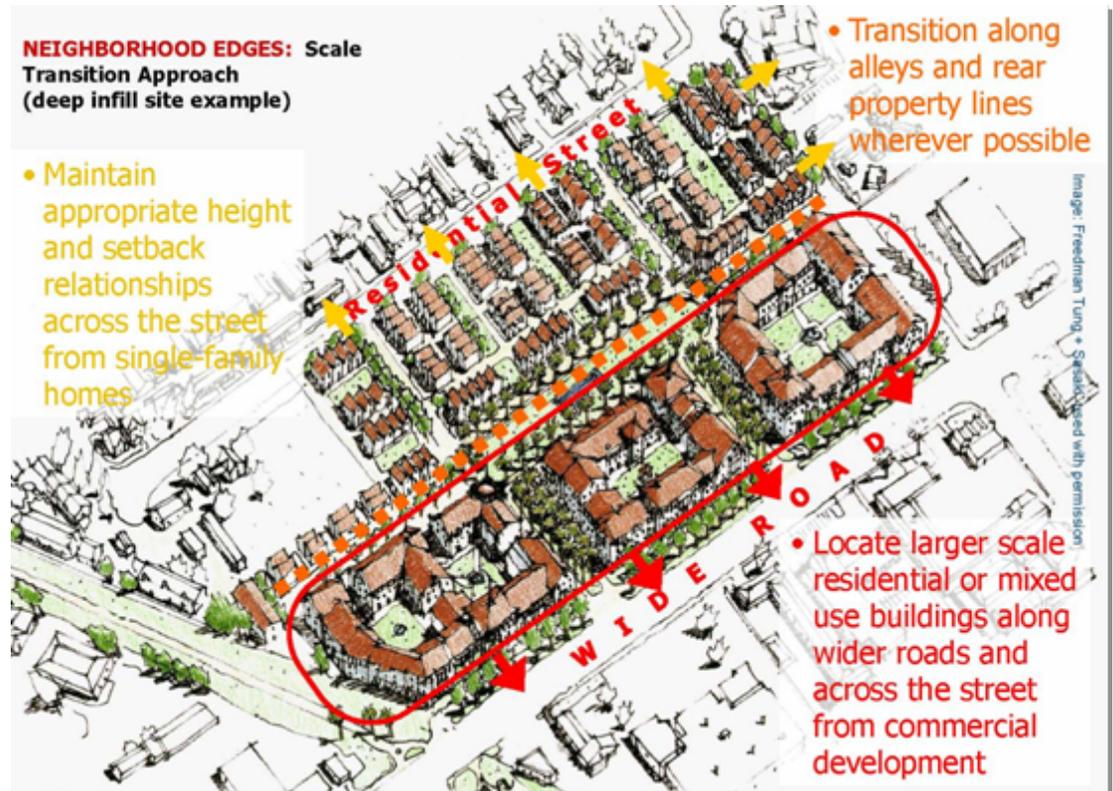
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- ▶ Linear to nodal



# What Happens between the Nodes

- ▶ Value future for declining segments
  - ▶ Need non-retail
  - ▶ Works with wide road
  - ▶ Harmonize with neighborhoods
- ▶ Corridor-suitable housing
  - ▶ Denser
  - ▶ Stacked Residential boulevard
  - ▶ Work & institutions



# Transitions

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- ▶ Residential entitlements easier to add to retail
- ▶ Harder to replace retail entitlements with residential
- ▶ Multi-story residential may have better tax revenues
- ▶ Rental housing projects may be the future



# Transit Center as a Node

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- ▶ Transit
- ▶ Retail
- ▶ Housing
- ▶ Office
- ▶ Civic
- ▶ Parking



# Remember the TBARTA Map?

## Long-Term Regional Network (2050)

Shows What Our Future Can Be

What the Long-Term Regional Network Includes:



**Short-Distance Rail** - Probably light rail, to connect regional anchors. (135 miles)



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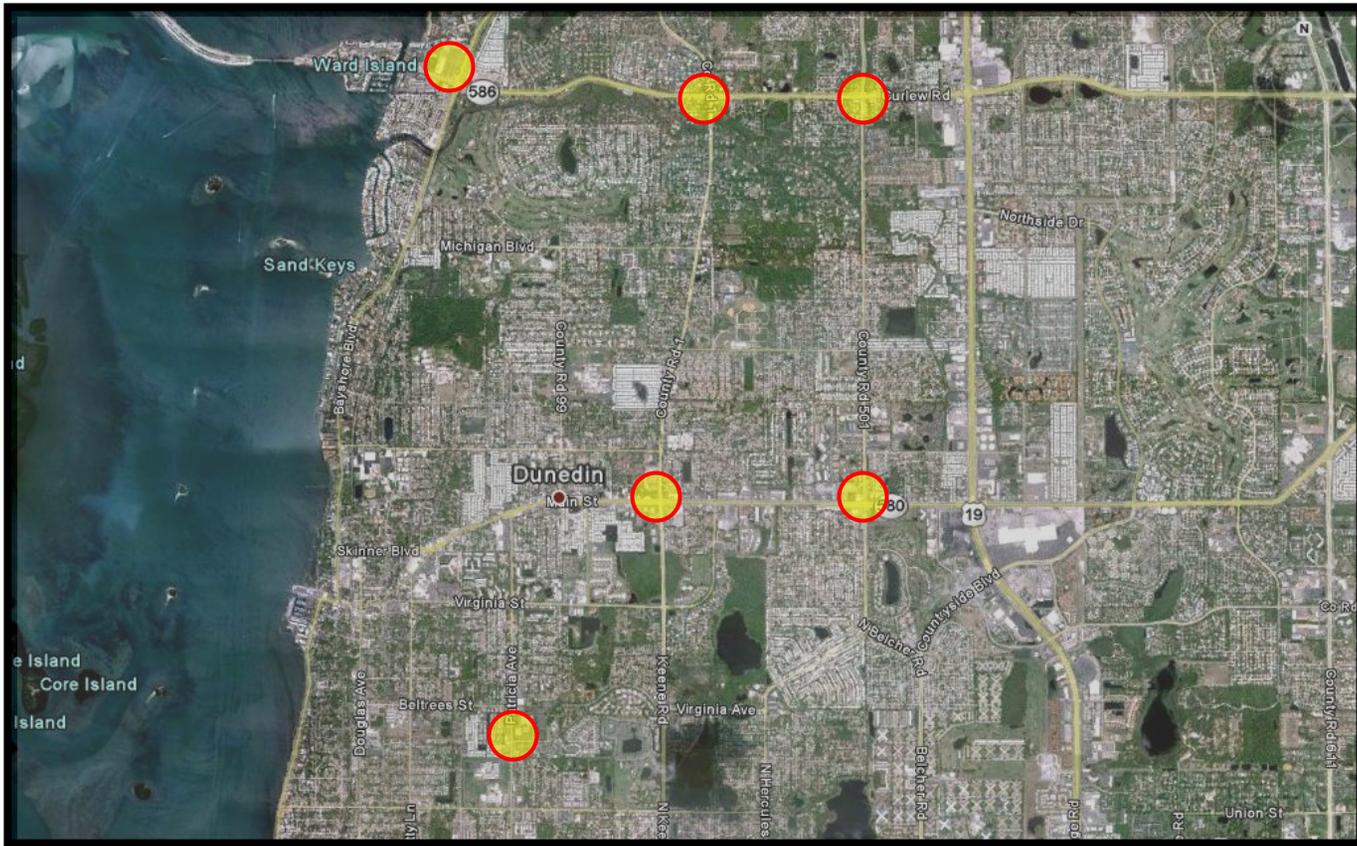


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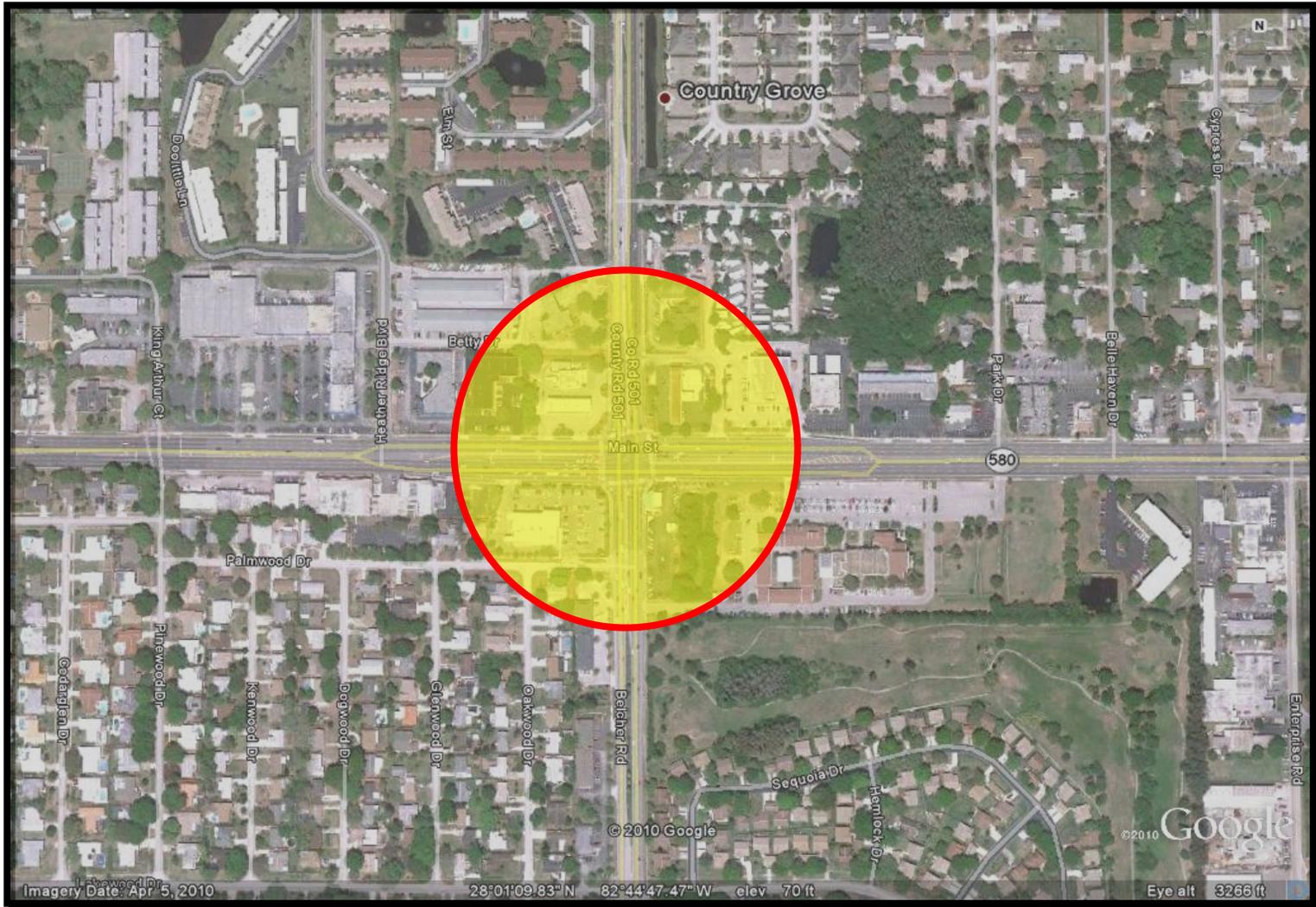


# Revitalization Strategies

- ▶ Cluster retail at crossroads
- ▶ Pattern of centers based on analysis of demand
- ▶ Size and distribution based on market analysis



# Dunedin TOD “Ground Zero”



# Comments / Questions

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## ▶ Staff Recommendations

- ▶ Adopt the Transit Oriented Development “TOD” land use category into the Dunedin 2025 Comprehensive Plan.
- ▶ Begin to lobby the Pinellas County MPO and TBARTA for a light rail station within the City limits.
- ▶ Continue planning the transformation of our corridors from linear to nodal.
- ▶ Look for nodal opportunities – enhance with appropriate entitlements.
- ▶ Vigorously support an additional “Penny for Pinellas” to support transit.



- **Transit investment has double the economic benefit to a city than does highway investment.**
- **Transit can enable a city to use market forces to increase densities near stations, where most services are located, thus creating more efficient subcenters and minimizing sprawl.**
- **Transit enables a city to be more corridor-oriented, making it easier to provide infrastructure.**
- **Transit enhances the overall economic efficiency of a city; denser cities with less car use and more transit use spend a lower proportion of their gross regional product or wealth on passenger transportation.**

