



CONNECTIONS 2026 Escambia County 10-Year Transit Development Plan

August 2016



CONNECTIONS 2026

Transit Development Plan

August 2016

Prepared for:

Escambia County

221 Palafox Place
Pensacola, FL 32502



and

Escambia County Area Transit (ECAT)

1515 West Fairfield Drive
Pensacola, FL 32501



Prepared by:



Table of Contents

Section 1: Introduction	1
Objectives of the Plan	1
State Requirements	1
TDP Checklist	2
Organization of the Report	4
Section 2: Baseline Conditions	6
Study Area Description	6
Population Profile	8
Growth	8
Age Distribution	12
Income	13
Population and Housing Densities	15
Transportation Disadvantaged Population	21
Employment Characteristics	22
Journey-to-Work Characteristics	27
Economic Conditions	29
Major Activity Centers	29
Tourism	31
Pensacola Naval Air Station	32
Pensacola International Airport	32
Roadway Conditions	34
Existing Roadway Conditions	34
Future Roadway Conditions	34
Land Use	36
Section 3: Existing Transit Service	39
Routes Description	39
Fares	43
Ridership Trends	43
Future Passenger Rail	45
Other Transportation Service Providers	45
Uber	49
Uber Airport Agreement	49
Trend Analysis and Peer Review	51
Selected Performance Measures	53
Summary Results of Fixed-Route Trend and Peer Analysis	53

Trend Analysis Summary.....	53
Peer System Analysis Summary	55
Paratransit Trend and Peer Analysis	55
Section 4: Public Involvement	57
Summary of Completed Public Involvement Activities.....	58
Technical Review Team Meetings.....	58
Local Coordinating Board Meetings.....	59
Agency Discussion Group Meeting	60
Escambia County Mass Transit Advisory Committee Meeting.....	60
Bus Operator Interviews and Survey	61
Non-Rider and Rider Discussion Group Workshops	61
Public Workshops	64
Grassroots Outreach Events	66
Stakeholder Interviews	67
Public (Non-Rider) Survey	68
On-Board Survey.....	77
Connections 2026 TDP Website and Social Media	90
Previous Completed Outreach Activities	91
Section 5: Situation Appraisal	97
Review of Plans and Studies	97
Federal Documents	98
FAST Act	98
State Plans/Programs.....	99
2060 Florida Transportation Plan	99
State of Florida Transportation Disadvantaged 5-Year/20-Year Plan.....	99
State Growth Management Legislation (House Bill 7207) (June 2011).....	100
Regional Documents	101
The Directions 2040 Long Range Transportation Plan (2015 Draft)	101
Florida-Alabama TPO 2016–2020 TIP (amended April 2015)	103
Potential Gulf Coast Service Restoration Options	103
Key Local Documents	104
Escambia County 2030 Comprehensive Plan (February 2015).....	104
City of Pensacola Comprehensive Plan (July 2011)	109
ECAT TDP Major Update FY 2012–2021 (September 2011)	112
ECAT Comprehensive Operational Analysis (December 2014).....	113
Escambia County Transportation Disadvantaged Service Plan, FY 2016 Annual Update (May 2015) .	114
Escambia County Area Transit 2015 Public Workshops: Proposed Route Modifications for Route 41 & 42 (July 2015).....	115

Pensacola Bay Ferry System	115
Ladders of Opportunity Funding Initiative.....	117
Main Street Corridor Management Plan (August 2014).....	118
Situation Appraisal	118
Socioeconomic Trends	119
Travel Behavior	120
Regional Transit Issues	121
Land Use.....	123
Public Involvement.....	124
Organizational Attributes.....	124
Technology.....	125
Section 6: Goals and Objectives	126
ECAT Vision	126
ECAT Mission Statement.....	126
ECAT Goals and Objectives	126
Section 7: Transit Demand Analysis.....	131
Market Assessment.....	131
Traditional Transit Market Assessment.....	131
Discretionary Transit Market Assessment	134
Forecast Ridership Modeling and Analysis	138
Model Inputs/Assumptions and Limitations.....	138
Transit Network	139
Demographic Data	139
Population and Employment Growth Rates	139
Special Generators.....	139
T-BEST Model Limitations	140
Ridership Forecast.....	140
Section 8: Alternatives Evaluation.....	142
Development of Alternatives	142
Service Improvements	143
Improvements to Existing Routes.....	143
New Service Expansions.....	144
Capital/Infrastructure Improvements.....	146
Policy/Other Improvements	148
Alternatives Evaluation	151
Alternatives Evaluation Methodology	151
Alternatives Scoring Thresholds	155
Results of Alternatives Evaluation	156

Section 9: 10-Year Cost Feasible Plan	159
10-Year Cost Feasible Plan Improvements	159
Service Improvements	159
Capital/Infrastructure Improvements.....	159
Cost and Revenue Assumptions.....	160
Operating Cost Assumptions	160
Capital Cost Assumptions	161
Revenue Assumptions.....	162
10-Year Implementation Plan and Unfunded Needs	163

List of Appendices

Appendix A: Farebox Recovery Ratio Report
Appendix B: Trend and Peer System Analysis
Appendix C: Public Involvement Supporting Materials
Appendix D: Recommended Performance Monitoring Program

List of Figures

Figure 2-1: Escambia County Annual Household Income Distribution	14
Figure 2-2: Total TD Trips, 2011–2014	21
Figure 2-3: Escambia and Santa Rosa Business Parks	23
Figure 2-4: 2040 Florida–Alabama TPO Roadway Conditions	35
Figure 2-5: 2040 Adopted Needs Plan Projects	35
Figure 2-6: 2040 Cost Feasible Plan Non-SIS Projects.....	36
Figure 2-7: Escambia County Future Land Use 2030	37
Figure 2-8: City of Pensacola Proposed Future Land Use Map.....	38
Figure 3-1: ECAT Passenger Trips (000), 2005–2013	44
Figure 3-2: Uber Demand Hot Spots by Time of Day	50
Figure 3-3: Airport Waiting Area for Uber Drivers.....	51
Figure 3-4: Uber Airport Pick up Area.....	51
Figure 4-1: How much awareness is there in the community about transit/public transportation?.....	69
Figure 4-2: What do you think of ECAT transit service?	69
Figure 4-3: Is traffic congestion a problem in Escambia County?.....	70
Figure 4-4: What role do you see transit playing in alleviating traffic congestion?	70
Figure 4-5: Have you used ECAT transit service?	71
Figure 4-6: Do you think there is a need for additional transit service in Escambia County?	71
Figure 4-7: What benefits of transit do you believe could occur as a result of additional service?.....	71

Figure 4-8: What type of additional transit service you would most like to see?	72
Figure 4-9: What do you think is a reasonable one-way fare to pay for transit service?	73
Figure 4-10: Do you believe there is a willingness in the community to consider additional local funding for transit?	73
Figure 4-11: Are you willing to pay additional local taxes for an expanded transit system?	74
Figure 4-12: What is your home ZIP code?	74
Figure 4-13: What is your work ZIP code?	75
Figure 4-14: What is your age?	75
Figure 4-15: What is the range of your total household income for 2015?	76
Figure 4-16: What type of place are you coming from now?	80
Figure 4-17: How did you get to the first bus stop for this one-way trip?	80
Figure 4-18: What type of place are you going to now?	82
Figure 4-19: After you get off the last bus of this trip, how will you get to your final destination?	83
Figure 4-20: How many days per week do you ride the bus?	83
Figure 4-21: How would you make this trip if not by bus service?	84
Figure 4-22: What type of fare did you pay when you boarded the bus?	84
Figure 4-23: What is the most important reason you ride the bus?	85
Figure 4-24: Which three service improvements would make ECAT better for you to use?	85
Figure 4-25: How do you prefer to receive information about ECAT?	86
Figure 4-26: ECAT Rider Socio-Economic Profile	87
Figure 4-27: How many working vehicles are at your home?	88
Figure 4-28: Number of licensed drivers in household?	88
Figure 4-29: How satisfied are you with each of the following?	89
Figure 4-30: <i>Connections 2026</i> TDP Online Outreach Tools	90
Figure 4-31: What do you think of public transit services in Santa Rosa County?	92
Figure 4-32: Do you think there is a need for additional transit service in Santa Rosa County? (Question 8)	92
Figure 4-33: If you answered yes to Question 8, what benefits of transit do you believe could occur as a result of additional service?	92
Figure 4-34: If you answered yes to Question 8, select the type of service you would most like to see:	93
Figure 4-35: Are you willing to pay additional local taxes for an expanded transit system?	93
Figure 4-36: Your age is?	93
Figure 4-37: What is the range of your total household income for 2015?	94
Figure 5-1: Escambia County Future Land Use 2030	107
Figure 5-2: City of Pensacola Future Land Use Map	110
Figure 5-3: Proposed Routes 31 and 41	116
Figure 5-4: Future Pensacola Bay Ferry Routes	117
Figure 5-5: Pensacola Greyhound Terminal	121
Figure 5-6: Regional Commuting Trips	122

Figure 5-7: ECAT Tracker Website Interface	125
Figure 8-1: Example Ridesourcing-Transit Partnership Application	150
Figure 8-2: Transit Service Alternatives Evaluation Process	155
Figure 9-1: Annual Operating and Capital Costs (millions)	161
Figure 9-2: Local Revenues	162
Figure 9-3: Cost Feasible Plan with Local Revenues (millions)	162

List of Tables

Table 1-1: TDP Checklist.....	3
Table 2-1: Escambia County Population Characteristics.....	8
Table 2-2: Escambia County Population Projections	9
Table 2-3: Escambia County Population Trends for Cities and Census Designated Places.....	9
Table 2-4: Demographic Characteristics	10
Table 2-5: Escambia County Age Distribution Trends Compared with Florida.....	12
Table 2-6: Percent Population Growth by Age Group	12
Table 2-7: Percent Population Growth for Older Persons (Ages 65+)	13
Table 2-8: Means of Transportation According to Age Group.....	13
Table 2-9: 2000, 2010 and 2015 Household Income	14
Table 2-10: Means of Transportation According to Income	15
Table 2-11: Escambia County TD Population and Passenger Trends.....	21
Table 2-12: TD Trips by Passenger Type (FY 2014)	22
Table 2-13: Escambia County Labor Characteristics	22
Table 2-14: Top Private Employers in Greater Pensacola Area	23
Table 2-15: Employment by Industry in Escambia County	24
Table 2-16: Escambia County Commuting Characteristics	27
Table 2-17: Escambia County Commuting Characteristics	28
Table 2-18: Escambia County Employment by Location (2014)	28
Table 2-19: Top 20 Trip Attractors in Escambia County	29
Table 2-20: Educational Institutions	29
Table 2-21: Major Retail Centers	31
Table 3-1: ECAT Route Inventory and Characteristics	41
Table 3-2: ECAT Bus Fare Rates.....	43
Table 3-3: Weekday Performance Statistics by Route.....	44
Table 3-4: Private Transportation Provider Inventory.....	46
Table 3-5: Social Service Provider Inventory	47
Table 3-6: Selected Peer Systems for ECAT Peer Review Analysis	52
Table 3-7: Performance Measures by Category	53

Table 3-8: Summary of ECAT Trends.....	54
Table 3-9: Peer System Analysis	56
Table 4-1: Public Involvement Participation Summary.....	58
Table 4-2: Ranking of Transit Characteristics.....	76
Table 4-3: Summary of On-Board Survey Responses by Route	78
Table 4-4: Summary of Transfer Activity	81
Table 4-5: Summary of Single Transfer Activity	81
Table 4-6: Summary of Two-Transfer Activity	82
Table 4-7: Top 10 Home ZIP Codes	88
Table 5-1: Summary of Reviewed Plans, Studies, and Policies	97
Table 5-2: Florida-Alabama TPO LRTP Proposed Needs Plan Projects (Peak Hour Bus Service Transit)	102
Table 5-3: Adopted 2040 Cost Feasible Plan – Non- SIS-Funded Projects.....	102
Table 6-1: ECAT Goals, Objectives and Strategies	127
Table 7-1: Transit Service Density Thresholds	135
Table 7-2: ECAT Average Annual Ridership and Growth Rates with No Improvements, 2017–2026*	141
Table 8-1: Alternative Evaluation Measures.....	153
Table 8-2: Alternatives Evaluation – Scoring Thresholds.....	156
Table 8-3: Results of the Alternatives Evaluation	157
Table 8-4: 10-Year Transit Service Alternatives Ranking	158
Table 9-1: 10-Year Costs and Revenues.....	164
Table 9-2: <i>Connections 2026</i> Implementation Plan	165

List of Maps

Map 2-1: Study Area	7
Map 2-2: Minority Population	11
Map 2-3: Percent of Population below Poverty Level	16
Map 2-4: Existing Population Density (2017).....	17
Map 2-5: Projected Population Density (2026)	18
Map 2-6: Existing Dwelling Units Density (2017).....	19
Map 2-7: Projected Dwelling Unit Density (2026)	20
Map 2-8: Existing Employment Density (2017).....	25
Map 2-9: Projected Employment Density (2026)	26
Map 2-10: Major Trip Attractors.....	30
Map 2-11: Entertainment Attractors	33
Map 3-1: Existing Transit Service Area.....	40
Map 4-1: Origin-Destination Exercise Results.....	65
Map 7-1: 2014 Transit Orientation Index	133
Map 7-2: Density Threshold Assessment (2017)	136
Map 7-3: Density Threshold Assessment (2026)	137
Map 8-1: 10-Year Service Alternatives	147

Section 1: Introduction

In 1971, Escambia County assumed operations of the privately-owned public transportation system that originated in 1884 for the greater Pensacola area. The transit system that began as mule-drawn cars is one of the oldest mass transit systems in the region. Today, the Escambia County Board of County Commissioners provides transit services through Escambia County Area Transit (ECAT). ECAT provides fixed-route bus service in the Pensacola area, including specialized services such as the University of West Florida (UWF) On-Campus Trolley, the Beach Trolley, and the Jury Trolley, as well as paratransit service countywide.

The State of Florida Public Transit Block Grant Program was enacted by the Florida Legislature to provide a stable source of funding for public transit. The Block Grant Program requires public transit service providers such as ECAT to develop, adopt, and annually update a 10-Year Transit Development Plan (TDP) to ensure that the provision of public transportation is consistent with the mobility needs of the local community. Under legislation that became effective February 20, 2007, the TDP must undergo a Major Update every five years. Each update must be submitted to the appropriate Florida Department of Transportation (FDOT) District Office by September 1st.

This major TDP update, referred to hereinafter as the *Connections 2026* TDP, was initiated by Escambia County on behalf of ECAT. The most recent 10-year TDP for Escambia County was adopted in September 2011, with a planning horizon covering Fiscal Years (FY) 2012–2021. The next major update of Escambia County’s TDP is due by September 1, 2016, and will extend the 10-year planning horizon to include FYs 2017–2026.

Objectives of the Plan

The main purpose of the *Connections 2026* TDP is to update the TDP for ECAT services in Escambia County, as currently required by State law. Upon completion, the *Connections 2026* TDP will provide a 10-year plan for transit and mobility needs, cost and revenue projections, and community transit goals, objectives, and policies.

State Requirements

According to Rule 14-73.001-Public Transportation of the Florida Administrative Code (F.A.C.), “The TDP shall be the applicant’s planning, development and operational guidance document to be used in developing the Transportation Improvement Program and the Department’s Five Year Work Program.”

The current TDP requirements were adopted by FDOT on February 20, 2007, and include the following:

- Major updates must be completed at least once every 5 years, covering a 10-year planning horizon.
- A Public Involvement Plan must be developed and approved by FDOT or be consistent with the approved Metropolitan/Transportation Planning Organization's (MPO/TPO) Public Involvement Plan. Escambia County is within the metropolitan planning area boundaries of the Florida-Alabama TPO, which also includes Santa Rosa and Baldwin (AL) counties.
- FDOT, the Regional Workforce Development Board, and the TPO must be advised of all public meetings at which the TDP is presented and discussed, and these entities must be given the opportunity to review and comment on the TDP during the development of the mission, goals, objectives, alternatives, and 10-year implementation program.
- Estimation of the community's demand for transit service (10-year annual projections) must use the planning tools provided by FDOT or a demand estimation technique approved by FDOT.

An additional requirement for the TDP was added by the Florida Legislature in 2007 when it adopted House Bill 985. This legislation amended s. 341.071 of the Florida Statutes (F.S.), requiring transit agencies to "... specifically address potential enhancements to productivity and performance which would have the effect of increasing farebox recovery ratio." FDOT subsequently issued guidance requiring the TDP and each annual update to include a 1–2-page summary report on the farebox recovery ratio and strategies implemented and planned to improve it as an appendix item (see Appendix A).

TDP Checklist

This 10-year plan meets the requirement for a TDP Major Update in accordance with Rule Chapter 14-73, F.A.C. Table 1-1 is a list of TDP requirements from Rule 14-73.001 and indicates whether or not the item was accomplished in this 10-year plan.

Table 1-1: TDP Checklist

Public Involvement Process		TDP Section
✓	Public Involvement Plan (PIP) drafted	Section 4, Appendix D
✓	PIP approved by FDOT	
✓	TDP includes description of Public Involvement Process	
✓	Provide notification to FDOT	
✓	Provide notification to Regional Workforce Board	
Situation Appraisal		
✓	Land use	Section 5
✓	State and local transportation plans	Section 5
✓	Other governmental actions and policies	Section 5
✓	Socioeconomic trends	Section 5
✓	Organizational issues	Section 5
✓	Technology	Section 5
✓	10-year annual projections of transit ridership using approved model	Section 7
✓	Assessment of whether land uses and urban design patterns support/hinder transit service provision	Section 5
✓	Calculate farebox recovery	Section 3, Appendix A
Mission and Goals		
✓	Provider's vision	Section 6
✓	Provider's mission	Section 6
✓	Provider's goals	Section 6
✓	Provider's objectives	Section 6
Alternative Courses of Action		
✓	Develop and evaluate alternative strategies and actions	Section 8
✓	Benefits and costs of each alternative	Section 8
✓	Financial alternatives examined	Section 8, Section 9
Implementation Program		
✓	Ten-year implementation program	Section 9
✓	Maps indicating areas to be served	Section 8
✓	Maps indicating types and levels of service	Section 8
✓	Monitoring program to track performance measures	Section 9, Appendix D
✓	Ten-year financial plan listing operating and capital expenses	Section 9
✓	Capital acquisition or construction schedule	Section 9
✓	Anticipated revenues by source	Section 9
Relationship to Other Plans		
✓	Consistent with Florida Transportation Plan	Section 5
✓	Consistent with local government comprehensive plan	Section 5
✓	Consistent with Florida-Alabama TPO long-range transportation plan	Section 5
✓	Consistent with regional transportation goals and objectives	Section 5
Submission		
✓	Adopted by Escambia County Board of County Commissioners	N/A
✓	Submitted to FDOT	N/A

Organization of the Report

This report is organized into nine major sections (including this introduction).

Section 2 summarizes the **Baseline Conditions** for Escambia County. This includes a review of baseline conditions, including a physical description of the study area, a population profile, and demographic and journey-to-work characteristics. Land use trends, major transit trip generators and attractors, economic factors, existing roadway conditions, and major employers also are explored.

Section 3 summarizes **Existing Transit Services** and includes an overview of public transportation services and facilities in Escambia County. The results of the trend analysis and peer review also are discussed. The trend analysis conducted for fixed-route bus services in Escambia County and reviews the performance of the public transportation system over time, and the peer review compares the performance of ECAT with other “peer” transit systems at a given point in time.

Section 4 presents the **Public Involvement** efforts undertaken as part of the *Connections 2026* TDP and summarizes the input gathered from the public involvement activities used as part of the TDP development process. The goal of the public involvement activities is to increase the likelihood of active participation from citizens and stakeholder agencies during the development of the updated plan. Input from the public is critical since the 10-year plan provides a strategic guide for public transportation in the community over the next 10 years.

Section 5 documents the **Situation Appraisal**, a requirement for a major TDP update in Florida, and assesses the environment in which ECAT operates. As part of the Situation Appraisal, a review of federal, local, and regional plans and studies and various transportation planning and programming documents was conducted, with an emphasis on issues that may have implications for ECAT.

Section 6 discusses the **Goals and Objectives**, which are an integral part of a TDP because they provide the policy direction to achieve the community’s vision. Recommendations to update the goals and objectives presented in this section were developed based on the review and assessment of existing conditions, feedback received during the public involvement process, and review of local transportation planning documents.

Section 7 discusses the **Transit Demand Analysis** undertaken for Escambia County. Assessment techniques are summarized, and the results assess demand for transit services in Escambia County. The transit demand and mobility needs assessments are synthesized with the baseline conditions assessment, performance reviews, public involvement feedback, and situation appraisal to yield a building block for evaluating the transit needs for the next 10 years.

Section 8 discusses the **Alternatives Evaluation** used to development and assess the transit alternatives or proposed improvements identified for the *Connections 2026* TDP. These proposed alternatives for fixed-

route service represent the transit needs for the next 10 years developed without consideration of funding constraints. Once the identified service improvements are prioritized using the evaluation process presented in this section, the prioritized list of improvements are used to develop the 10-year implementation plan presented in Section 9.

Section 9 summarizes the **Connections 2026 10-Year Cost Feasible Plan** developed for ECAT’s fixed-route bus transit service. The Cost Feasible Plan identifies the funded service and capital improvements as well as the unfunded needs and includes a discussion of the revenue assumptions and capital and operating costs used.

Section 2: Baseline Conditions

This section reviews the baseline conditions of the study area and provides context for the *Connections 2026* TDP through the following components:

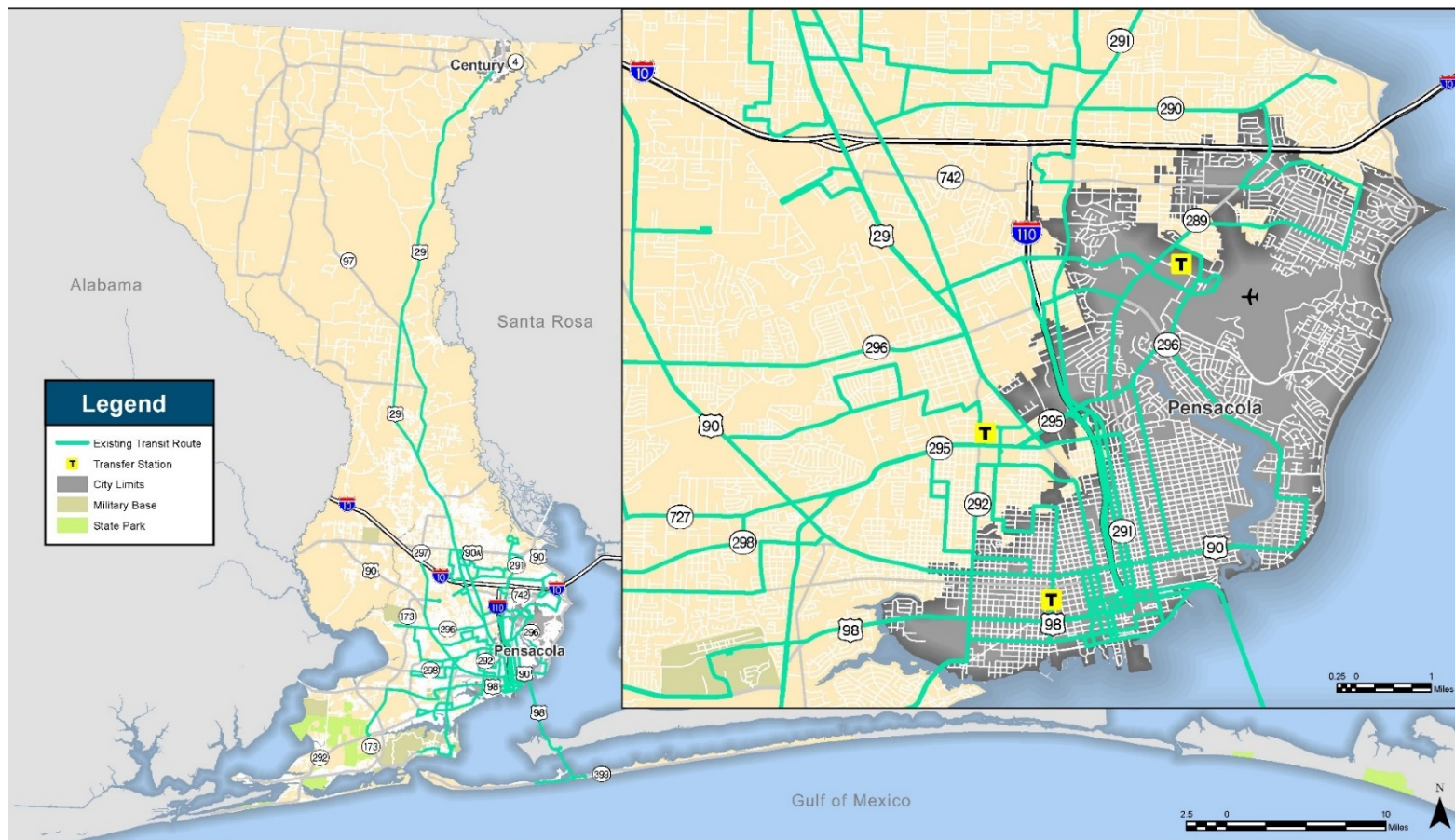
- Study area description
- General population characteristics and trends, including:
 - Growth
 - Population density
 - Minority populations
 - Age
 - Income
- Transportation disadvantaged population
- Housing density
- Employment characteristics including:
 - Employment density
 - Labor force
- Journey-to-work characteristics
- Major activity centers and tourism
- Current and future land use
- Roadway and traffic conditions

Discussion of the above are supported by maps and graphics throughout this section. Primary data sources include the US Census Bureau’s American Community Survey (ACS), the University of Florida’s Bureau of Economics and Business Research (BEBR), and socioeconomic data from the Northwest Florida Regional Planning Model (NWFRPM). These data sources are supplemented by other local and regional sources, as needed.

Study Area Description

Nicknamed the “Western Gate to the Sunshine State,” Escambia County is the westernmost county of the Florida Panhandle. It is bordered by Escambia County, Alabama, to the north; Baldwin County, Alabama, to the west; Santa Rosa County, Florida, to the east; and the Gulf of Mexico to the south. According to the 2010 Census, the county is 874.70 square miles in total, with 656.46 square miles of land and 218.24 square miles of water. Map 2-1 illustrates the study area for the *Connections 2026* TDP.

Map 2-1: Study Area



Escambia County

Within Escambia County is the Pensacola–Ferry Pass–Brent Metropolitan Area (MSA). This area is centered on the principal city of Pensacola and overlaps with Santa Rosa County. The other three incorporated cities within the MSA are Milton, Gulf Breeze, and Century. The urbanized areas of Escambia County include Pensacola, Century, and the unincorporated census designated places of Ferry Pass, Gonzalez, Molino, Bellview, Brent, Ensley, Ferry Pass, Goulding, Myrtle Grove, Warrington, and West Pensacola. The Pensacola Urbanized Area includes areas outside of Escambia County such as Lillian and Orange Beach, Alabama, and parts of Santa Rosa County. The northern portion of the county is not as densely-populated as the southeastern portion near the coastline. According to the 2010 Census, the majority (92%) of the Escambia County population resides in urbanized areas.

Population Profile

Growth

Information from the 2010 Census and ACS was used to develop a population profile for the study area. Escambia is the 19th most populous county in Florida and has 1.5% of Florida’s population. As shown in Table 2-1, data from the decennial Census and ACS show that population of Escambia County increased only 5.2% from 2000 to 2014, from 294,410 to 310,659, an annual growth rate of 1.3%. Within the region, Santa Rosa County experienced a higher annual growth rate from 2010 to 2015 at 2.08% annually.

Table 2-1: Escambia County Population Characteristics

Characteristic	2000	2010	2014**	% Change 2000–2014
Persons	294,410	297,619	310,659	5.2%
Households	111,049	116,238	115,094	3.5%
Number of workers	128,323*	125,299	133,900	4.2%
Land area (sq mi)	662.35	656.46	656.46	-0.9%
Water area (sq mi)	213.21	218.24	218.24	2.3%
Average household size	2.45	2.41	2.53	3.2%
Workers per household	1.2	1.1	1.2	0.7%
Persons per square mile of land area	444.5	453.4	473.2	6.1%
Workers per square mile of land area	193.7	190.9	204.0	5.0%

* 2006-2010 ACS 5-Year Estimates ** 2014 ACS 1-Year Estimates

Source: 2000 and 2010 Census

As shown in Table 2-2, medium population projections prepared by BEBR estimate that the population of Escambia County will grow to 314,717 people by 2025, an increase of 2.9%, and to 324,947 by 2040, an increase of 6.2%.

A review of population trends for the 2 municipalities and 11 Census Designated Places (CDPs) in Escambia County also was conducted. Table 2-3 provides population trends for those municipalities and for Escambia

County for 1990, 2000, and 2010. The vast majority of the population (82%) resides in unincorporated areas of the county. Pensacola has the highest number of residents, with a population of 51,923 persons.

Table 2-2: Escambia County Population Projections

Census	Estimates	Projections					
2010	2014*	2015**	2020**	2025**	2030**	2035**	2040**
297,619	303,907	305,872	310,465	314,717	318,550	321,950	324,947

* 2014 ACS 1-Year Estimates **BEBR 2040 Projections

Source: 2000 and 2010 Census

In terms of population growth, the Gonzalez and Ferry Pass CDPs were among the fastest-growing areas (16.8% and 15.0%, respectively) during the 2000–2010 time period, and the Molino CDP in the Northwest Escambia Division experienced the highest negative growth (-30.5%). It is worth noting that parts of the Brent, Ferry Pass, and Goulding CDPs were annexed to Pensacola City during that time period. Despite the annexations, Pensacola City experienced a negative growth rate of 7.7% between 2000 and 2010.

Table 2-3: Escambia County Population Trends for Cities and Census Designated Places

Municipality	1990	2000	2010	% Change 1990–00	% Change 2000–10	% Change 1990–2010
Escambia County	262,798	294,410	297,619	12.0%	1.1%	13.3%
Cantonment Division	34,746	43,737	50,683	25.9%	15.9%	45.9%
Ensley CDP (part)	4,879	6,148	6,478	26.0%	5.4%	32.8%
Ferry Pass CDP (part)	5,242	5,332	6,132	1.7%	15.0%	17.0%
Gonzalez CDP	7,669	11,365	13,273	48.2%	16.8%	73.1%
Century Division	8,395	10,159	9,859	21.0%	-3.0%	17.4%
Century Town	1,989	1,714	1,698	-13.8%	-0.9%	-14.6%
Molino CDP (part)	1,063	1,161	1,172	9.2%	0.9%	10.3%
Northwest Escambia Division	3,864	4,485	4,366	16.1%	-2.7%	13.0%
Molino CDP (part)	144	151	105	4.9%	-30.5%	-27.1%
Pensacola Division	215,793	236,029	232,756	9.4%	-1.4%	7.9%
Bellview CDP	19,386	21,201	23,355	9.4%	10.2%	20.5%
Brent CDP	21,624	22,257	21,804	2.9%	-2.0%	0.8%
Ensley CDP (part)	11,483	12,604	14,124	9.8%	12.1%	23.0%
Ferry Pass CDP (part)	21,059	21,844	22,789	3.7%	4.3%	8.2%
Goulding CDP	4,159	4,484	4,102	7.8%	-8.5%	-1.4%
Myrtle Grove CDP	17,402	17,211	15,870	-1.1%	-7.8%	-8.8%
Pensacola City	58,165	56,255	51,923	-3.3%	-7.7%	-10.7%
Warrington CDP	16,040	15,207	14,531	-5.2%	-4.4%	-9.4%
West Pensacola CDP	22,107	21,939	21,339	-0.8%	-2.7%	-3.5%

Source: Florida 2010: Population and Housing Unit Counts; 2010 Census of Population and Housing

Table 2-4 lists some demographical characteristics of Escambia County for 2000, 2010, and 2014. The percent male and female ratio was virtually equal and unchanged between 2000 and 2010; from 2010 to 2014, the percent of females increased approximately 3%. Although Escambia County has a relatively small proportion of minority population, over time, the county has become more ethnically diverse. In 2010, 68.9% of the population was white, and Black/African-American, Hispanic, and other races represented 22.9%, 4.7%, and 4.5% of the population in 2010, respectively. The Black population decreased slightly, and the Hispanic population nearly doubled, from 2.7% in 2000 to 5.5% in 2014. This represents a potentially growing key market of traditionally transit-dependent populations. Santa Rosa County has a significantly smaller Black population, accounting for 6.7% in 2015, and the Hispanic population was comparable to Escambia County, accounting for 5.4%. Map 2-2 shows the percent of minorities by Census block group in 2014; the areas with high concentrations of minorities are in Century, West Pensacola, and Pensacola.

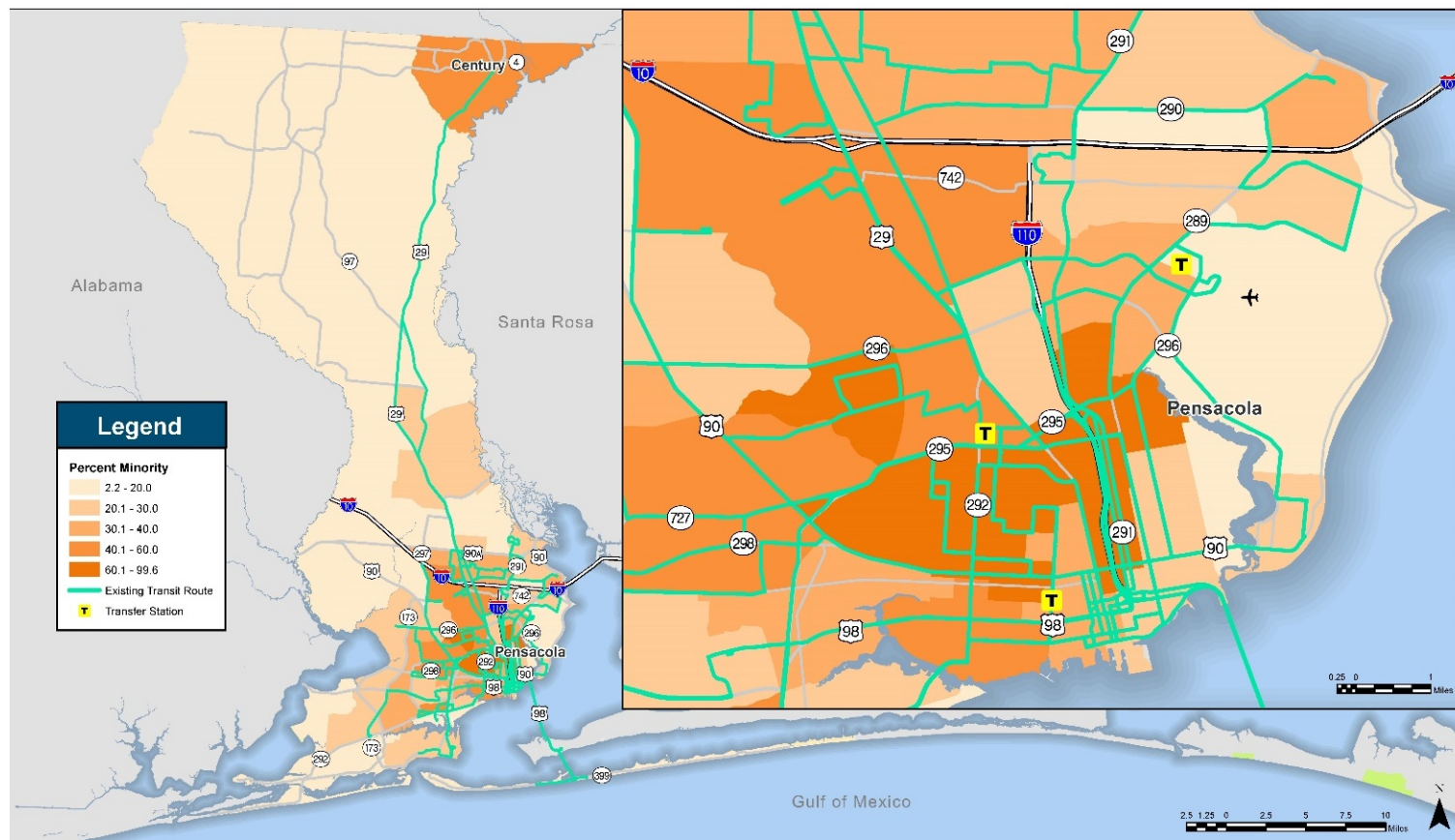
Table 2-4: Demographic Characteristics

Characteristic	2000	2010	2014
Gender			
Male	49.7%	49.4%	46.8%
Female	50.3%	50.6%	53.2%
Ethnic Origin			
White	72.4%	68.9%	74.1%
Black/African American	21.4%	22.9%	18.1%
Other	0.9%	1.3%	1.0%
Two or more races	2.2%	3.2%	2.9%
Hispanic Origin			
Not of Hispanic/Latino origin	97.3%	95.3%	94.5%
Hispanic or Latino origin	2.7%	4.7%	5.5%
Educational Level			
<12th grade	17.9%	13.3%	13.2%
High school graduate	28.3%	29.7%	32.9%
Some college	24.5%	24.3%	23.1%
College graduate	29.2%	23.4%	23.9%
Below Poverty Level	15.4%	16.4%	17.1%
Vehicle Available in Household			
None	8.36%	7.80%	7.01%
One	38.38%	37.26%	39.07%
Two	39.54%	38.68%	39.61%
Three or more	13.71%	16.26%	14.32%

Sources: 2000 and 2010 Census, 2014 ACS 5-Year Estimates, 2010 ACS 5-year estimates

Ethnic diversity in Escambia County has gradually increased, and vehicle household ownership also has seen small changes. Households with limited access to personal vehicles is a potential transit-dependent population. The percentage of zero-vehicle households decreased since 2000 by approximately 1.35%. Within Escambia County, 7% of households did not own a vehicle in 2014. The majority of households within the county have one or two cars, each accounting for 39% of the population in 2014.

Map 2-2: Minority Population



Percent Minority 2014

With respect to education level, the percent of college graduates decreased from 29.2% in 2000 to an estimated 23.9% in 2014. At the same time, the percent who had attained less than a 12th-grade level decreased from 17.9% to 13.2% in 2000 and 2014, respectively. Education levels typically are related to income levels within a community, with higher percentages of persons graduating from college often earning higher incomes.

Age Distribution

Current and future age distribution of the population in Escambia County are major factors when considering demand for public transportation. Compared to Florida as a whole, Escambia County has a small proportion of younger and older residents. Age distribution had incremental changes since 2000, most notably with a decreasing percent in those ages 15 or younger and 65 and older, as seen in Table 2-5.

Table 2-5: Escambia County Age Distribution Trends Compared with Florida

Age	2000	2010	2014
15 and under	19.5% (22.8%)	19.0% (21.3%)	18.8% (20.9%)
18–64	63.0% (59.6%)	66.6% (61.4%)	66.1% (60.9%)
65+	17.5% (17.6%)	14.4% (17.3%)	15.1% (18.2%)

Legend: Escambia County Age Distribution (Florida Age Distribution)

Persons ages 15 or younger are not legally allowed to operate a motor vehicle. Teenagers who are unable to afford or have access to their own vehicle may have a higher propensity for using transit or finding a ride (carpool). As seen in Table 2-6, in Escambia County, the percentage those ages 15–19 is projected to increase from 6.3% in 2015 to 7% in 2025.

Table 2-6: Percent Population Growth by Age Group

Age Group	Projection Year			
	2015	2020	2025	2030
0–9	12.4%	11.6%	12.0%	11.9%
10–14	6.3%	6.2%	6.0%	5.8%
15–19	6.3%	6.8%	7.0%	6.4%
15–17	3.0%	3.3%	3.4%	3.1%
18–19	3.3%	3.5%	3.6%	3.3%
20–44	32.7%	32.3%	32.3%	32.7%
45–64	25.9%	24.3%	21.7%	20.4%
65+	16.5%	18.7%	21.0%	22.8%

Source: BEBR Population Projections

Older persons also may be more likely to use public transportation, as the aging process may place limitations on their ability to drive. Table 2-7 shows the projected population of persons age 65 and older for Escambia County and Florida based on data from BEBR's *Florida Population Studies Population Projections*. By 2025, this population group is projected to increase to 20.1% of the county's total population and will continue to increase until 2030, to 22.85%. Escambia County has a smaller proportion

of persons age 65 and older compared to the statewide average. The population segment of those ages 45–64 years, which will be the next wave of retirees, currently represents approximately 26% of the total population in the county. A growing need for public transit within Escambia County can be assumed to accommodate this age group, considering the growing share of age groups more likely to use transit.

Table 2-7: Percent Population Growth for Older Persons (Ages 65+)

Geography	BEBR Projections					
	2015	2020	2025	2030	2035	2040
Escambia County	16.5%	18.7%	21.0%	22.8%	22.8%	22.2%
Florida	18.9%	21.0%	22.7%	24.9%	25.2%	25.5%

Source: BEBR Population Projections

Table 2-8 shows the means of transportation according to age group in Escambia County. The 2000–2014 ACS revealed that the majority of transit riders were young adults ages 20–24, totaling 37% of riders because of the presence of UWF and Pensacola State College. The second largest group of transit riders were adults ages 25–44.

Table 2-8: Means of Transportation According to Age Group

Age	Total	Drove Alone	Carpooled	Public Transit
Workers 16 and over	5.6%	2.8%	4.1%	8.8%
16–19	13.9%	11.0%	15.1%	13.0%
20–24	39.1%	41.3%	42.9%	36.9%
25–44	21.6%	23.0%	23.7%	17.1%
45–54	8.9%	9.8%	7.9%	12.1%
55–59	10.9%	12.1%	6.3%	12.1%
60 and over	5.6%	2.8%	4.1%	8.8%

Source: 2010–2014 American Community Survey

Income

Income is a leading influence in travel decisions. Due to less available disposable income, low-income households are less likely to own one vehicle per licensed driver and, therefore, may be more dependent on public transit to make essential or recreational trips. Based on 2014 household income levels, the majority of Escambia households have an income between \$10,000 and \$49,000. Between 2000 and 2014, the county saw household incomes trending higher, with a 40% increase in the number of households with an annual income of \$50,000 or more, as seen in Table 2-9. Despite the overall increase in household income, the poverty status for individuals has gradually increased since the year 2000.

Census block groups with lower per capita income are more likely to rely on transit for their transportation needs. According to 2010 Census, the percent of individuals living below the poverty level in Escambia County was 17.1%, which is higher than the state average of 16.7%. Regionally, the percent of persons in poverty in Santa Rosa County was lower than Escambia County, at 11.2%, according to the 2014 5-Year ACS estimates.

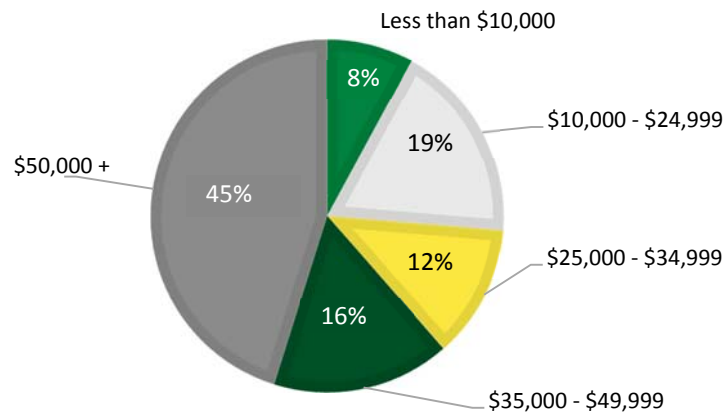
Table 2-9: 2000, 2010 and 2015 Household Income

Characteristic	2000	2010	2014	% Change 2000–2014
Household Income (Escambia County)				
Under \$10,000	11.4%	8.7%	7.9%	-30.7%
\$10,000–\$49,999	56.4%	66.1%	46.9%	-16.8%
\$50,000 or more	32.3%	25.1%	45.1%	39.63%
Poverty Status				
Below poverty level (Escambia County)	15.4%	16.4%	17.1%	11.0%
Below poverty level (Florida)	12.5%	16.5%	16.7%	33.6%

Sources: 2000 Census, ACS 2010, ACS 2014

Figure 2-1 shows the distribution of income for residents in Escambia County. The median income during this time period was \$57,640. The largest income bracket includes households with annual incomes over \$50,000, representing 45% of the population. In 2014, 39% of households made less than \$35,000 annually, a rough representation of low-income households.

Figure 2-1: Escambia County Annual Household Income Distribution



Source: 2014 ACS

Data from the 2010–2014 ACS confirm that low-income workers represent the largest group of workers who use public transit for transportation. As shown in Table 2-10, the majority of transit riders in Escambia County were from low-income households, with 41% of transit riders having an earning less than \$10,000.

Table 2-10: Means of Transportation According to Income

Income	Total Estimate	Drove Alone Estimate	Carpooled Estimate	Public Transit Estimate
Total workers age 16 and over with earnings	134,436	101,949	14,101	818
\$1–\$9,999 or loss	15.9%	12.1%	21.8%	41.0%
\$10,000–\$14,999	8.7%	7.6%	9.3%	16.1%
\$15,000–\$24,999	19.3%	18.2%	21.5%	20.2%
\$25,000–\$34,999	18.3%	19.6%	19.9%	9.2%
\$35,000–\$49,999	15.9%	17.6%	14.1%	4.2%
\$50,000–\$64,999	9.1%	10.5%	6.2%	7.6%
\$65,000–\$74,999	3.6%	4.2%	1.8%	0.0%
\$75,000 or more	9.2%	10.3%	5.4%	1.8%

Source: 2010-2014 ACS

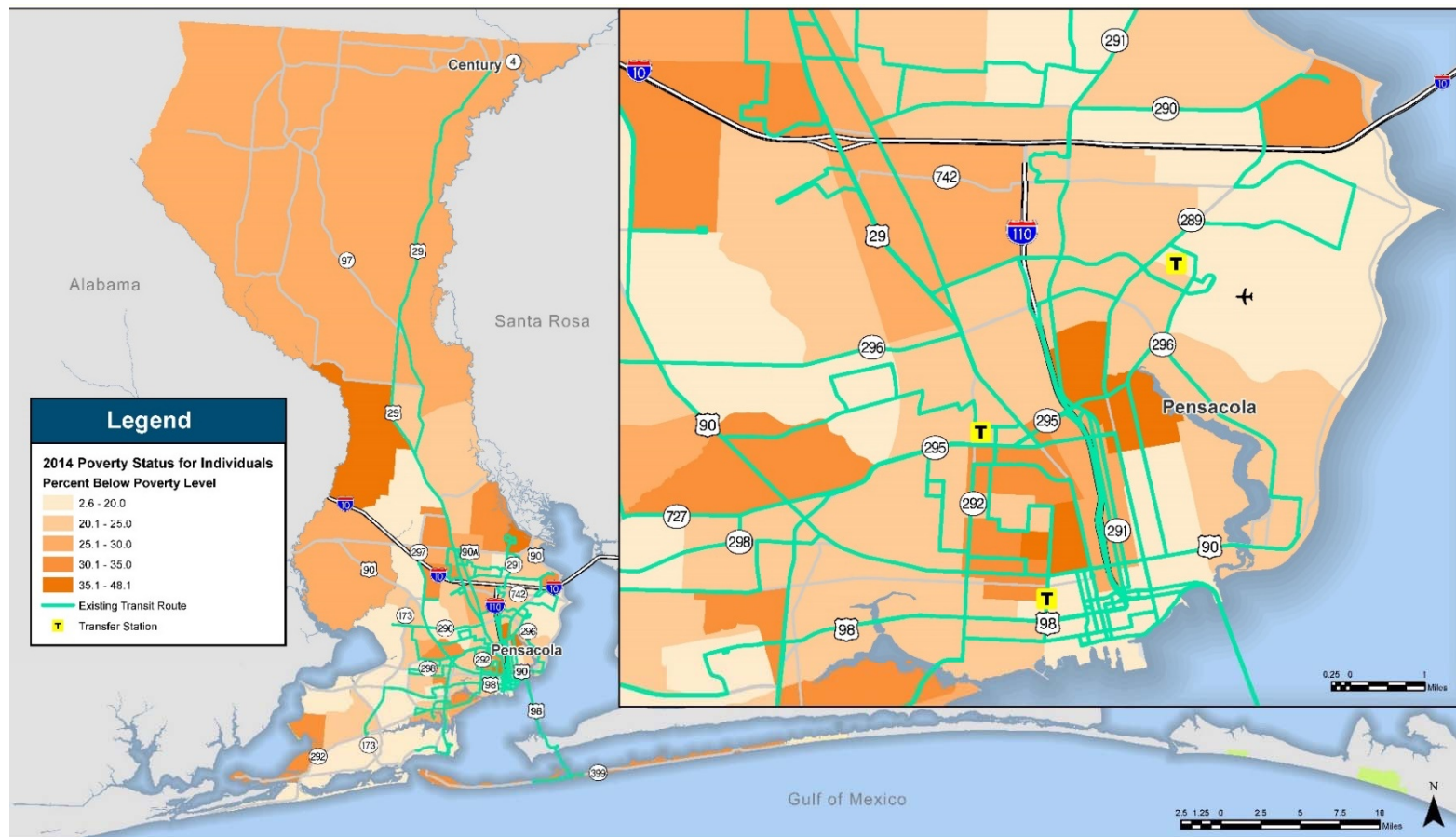
Map 2-3 illustrates the areas of the county with the highest percentage of households below the poverty line based on 2014 data. Within Pensacola are areas where 35-48% of households are living below the poverty level, including the Pensacola Inner City Community Redevelopment Area (CRA) and the area between I-110 and the Bayou Texar. Outside Pensacola, the areas northwest of Bellview and the southwestern most tip of Escambia County have the highest percentage of households below the poverty line. Some of these areas correspond to the areas with the highest percent of minority populations, especially within the Inner City CRA. The highest per-capita income portions of the county are along the waterfront areas, and the lowest are found in the outskirts of Pensacola.

Population and Housing Densities

Population and dwelling unit densities (measured per square mile) are key factors when assessing potential transit needs, as they reveal the potential in the number of transit riders within a concentrated area. Maps 2-4 through 2-7 provide the density characteristics for Escambia County that are particularly relevant to the *Connections 2026* TDP effort using population and housing data from the NWFRPM. Maps 2-4 and 2-5 show population densities by traffic analysis zones (TAZ) for 2017 and 2026, and Maps 2-6 and 2-7 show the dwelling unit density by TAZ for 2017 and 2026.

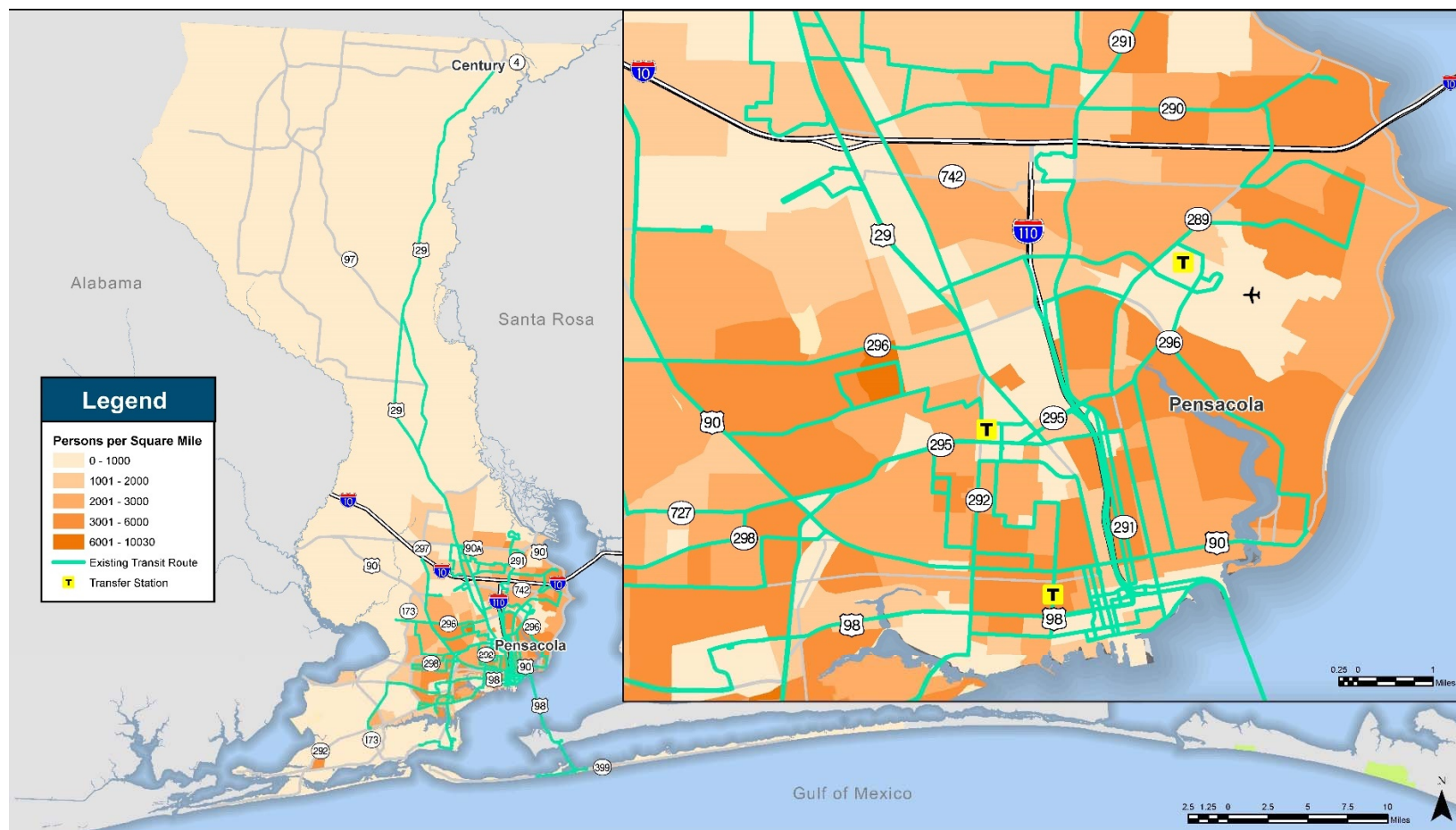
In addition to the Pensacola area, most areas within Escambia County have low population densities. The average household size for Escambia County grew from 2.45 persons in 2000 to 2.53 persons in 2014, and the majority of households in Escambia County (63.7%) comprise families rather than single-person households, according to the 2010 Census. The areas of highest dwelling unit densities mirror the areas in which the highest population densities are found. Much of the growth in dwelling units between now and 2026 is projected to occur in the outskirts of Pensacola.

Map 2-3: Percent of Population below Poverty Level



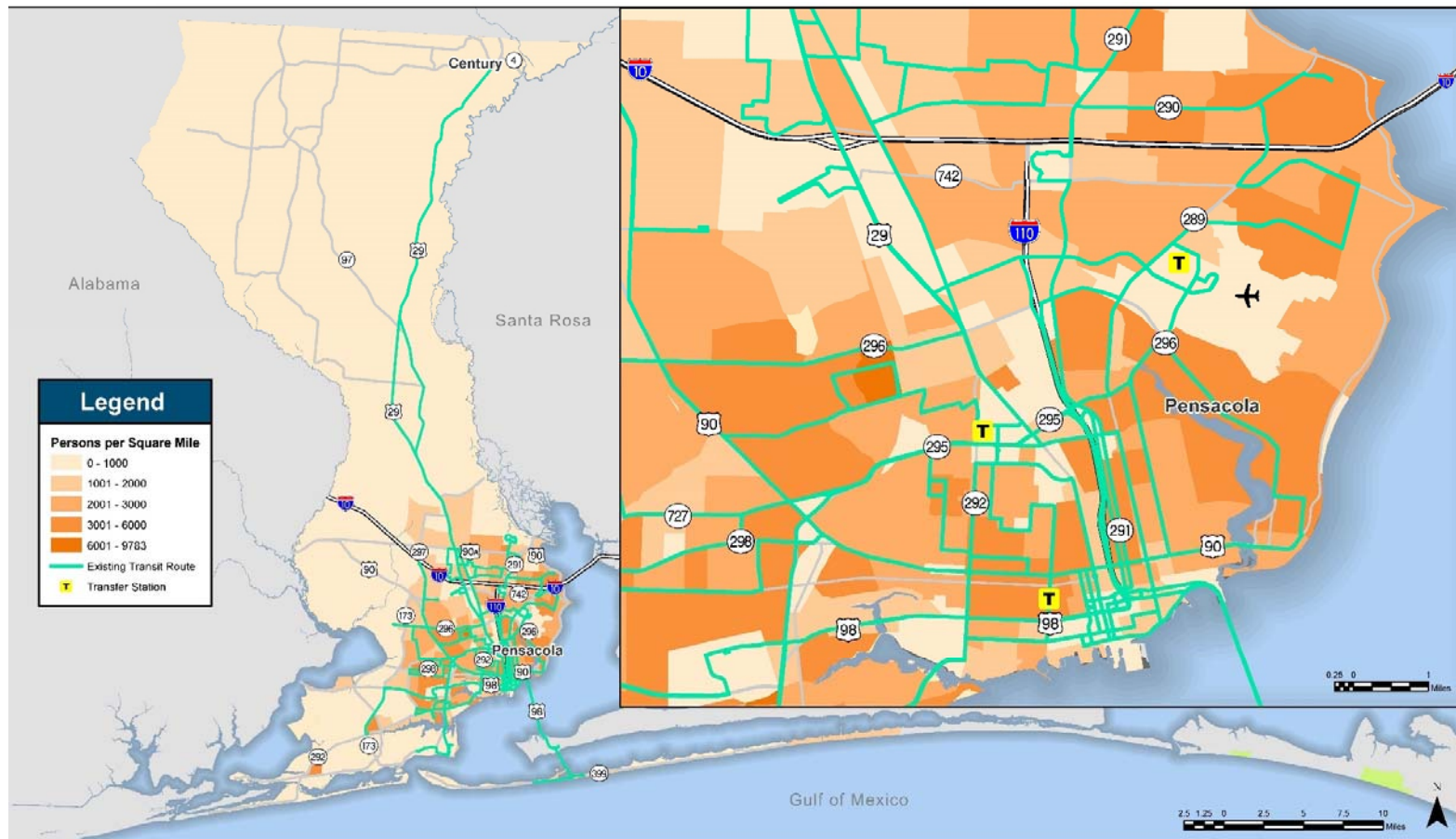
Poverty Status

Map 2-4: Existing Population Density (2017)



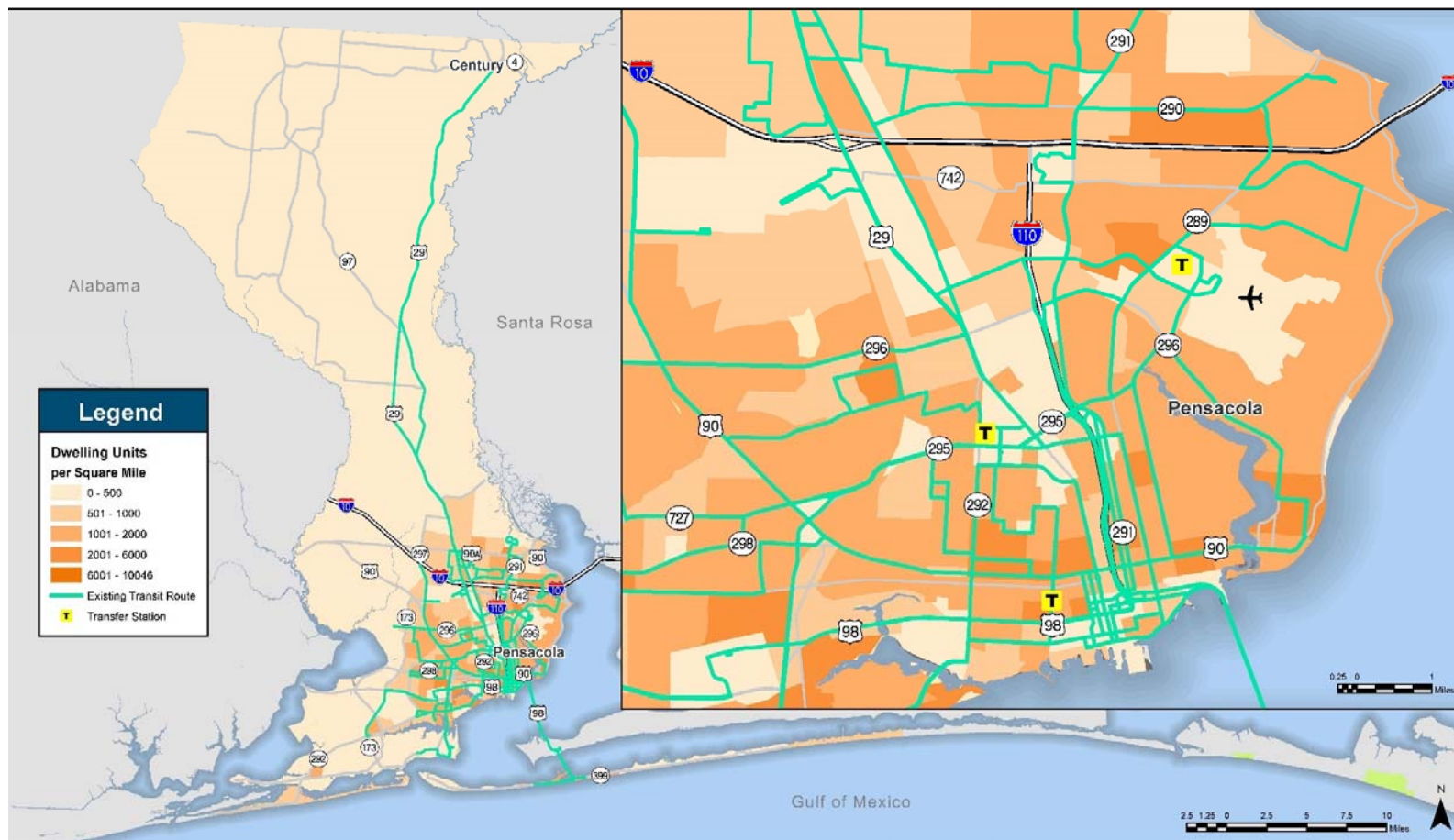
Population Density 2017

Map 2-5: Projected Population Density (2026)



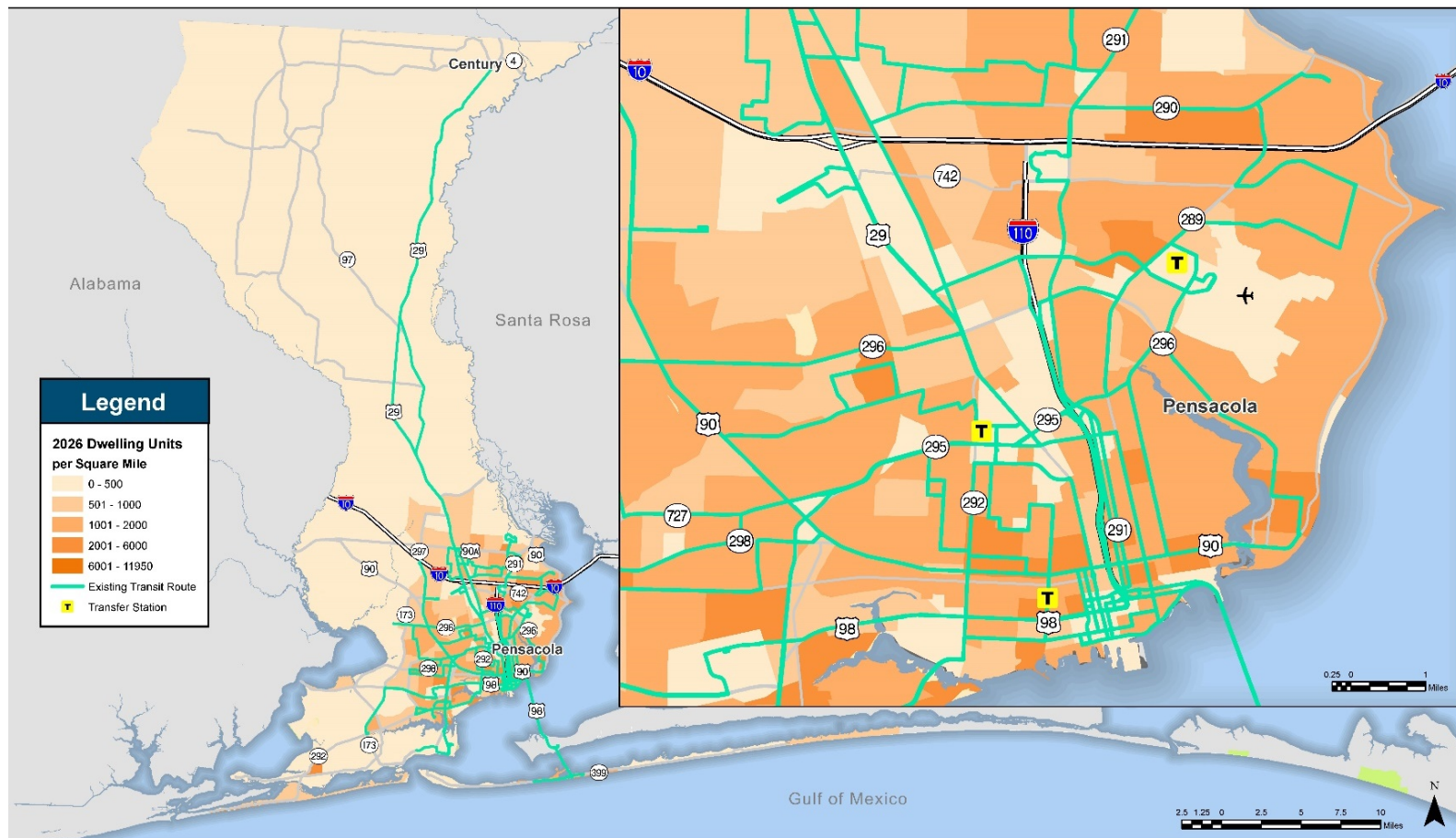
Population Density 2026

Map 2-6: Existing Dwelling Units Density (2017)



Housing Density 2017

Map 2-7: Projected Dwelling Unit Density (2026)



Housing Density 2026

Transportation Disadvantaged Population

In addition to fixed-route bus services, Escambia County provides public transportation to the transportation disadvantaged (TD) populations living in the county. Since January 2015, Escambia County has been the local Community Transportation Coordinator (CTC), coordinating medical and non-medical transportation services for the TD population. Priority for service is given to those who do not own or drive their own vehicle and do not have family or friends to assist them in traveling to and from destinations. TD service also is provided based on needs; medical needs and life-sustaining activities are given higher priority than business or recreation trips.

Table 2-11 shows the trend in the potential TD population compared to TD passengers served between 2012 and 2014 in Escambia County. During this period, the TD population increased 5%, from 121,358 in 2012 to 127,453 persons in 2015. The number of potential TD passengers served has fluctuated and has reached a low rate of 1.08% in 2015.

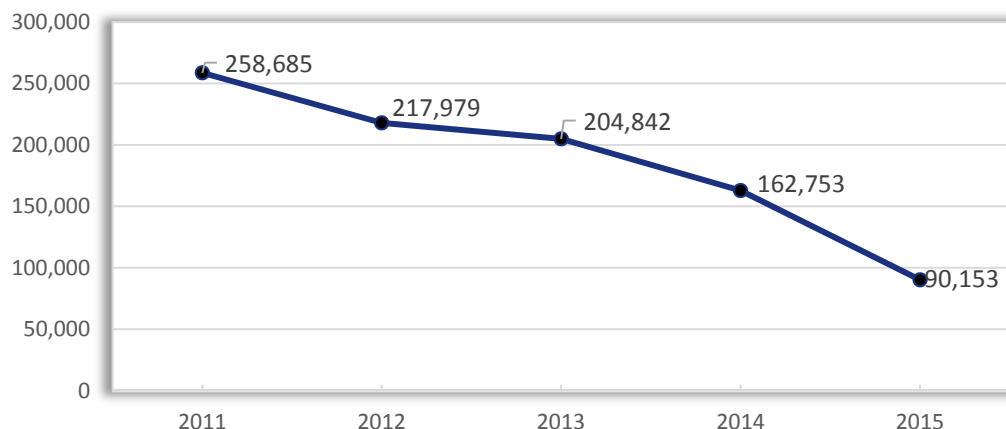
Table 2-11: Escambia County TD Population and Passenger Trends

Year	2012	2013	2014	2015	% Change (2012–2015)
Potential TD Population	121,358	122,842	124,353	127,453	5.02%
TD Passengers Served	2,694	2,825	2,355	1,374	-49.0%
Percent of Potential TD Population Served	2.22%	2.30%	1.89%	1.08%	-51.2%

Source: Florida Commission for Transportation Disadvantaged

TD passenger trips decreased annually from 2011 to 2015 by 49%, primarily due to the Medicaid funding cuts experienced throughout Florida. Figure 2-2 shows the number of TD trips served during this period. As shown in Table 2-12, the majority of TD trips in in FY 2014 were for older adults (56,092), followed by persons of low-income (21,974) and person with disabilities (21,393).

Figure 2-2: Total TD Trips, 2011–2014



Source: Florida Commission for the Transportation Disadvantaged (CTD) Annual Operation Reports (AOR)

Table 2-12: TD Trips by Passenger Type (FY 2014)

Passenger Type	Trips
Older adults	52,895
Children	11,712
Low Income	21,974
Persons with disabilities	21,393
Low income/persons with disabilities	730
Other	50,852
Total	162,753

Source: Florida CTD Annual Operation Reports (AOR)

Employment Characteristics

Employment and labor characteristics help to explain land use and travel patterns that affect transit service. In 2013, there were more than 6,500 employer establishments. As shown in Table 2-13, almost 60% of persons ages 16 and older were in the civilian workforce. The US Department of Defense is the largest economic generator in the Greater Pensacola Area, with airfields including the Naval Air Station Pensacola, Saufley Field, Corry Station, and Whiting Field.

Table 2-13: Escambia County Labor Characteristics

Labor Characteristic	
Total employer establishments, 2013	6,581
Total employment, 2013	98,366
Percent of population in civilian force, 2010–2014	57.6%

Source: Census Quick Facts for Escambia County

More than 10,000 people are employed by healthcare facilities in and around Escambia County, including Baptist Health Care and Sacred Heart Health System, West Florida Healthcare, and the Naval Hospital Pensacola. The marine industry has a niche in the local economy, as boat-related spending contributes more than \$1 billion annually to northwest Florida's economy and creates more than 7,000 jobs. The Navy Federal Credit employs the third-most private sector jobs in the county and is expected to increase its labor force by bringing 5,000 new jobs to the area by 2026, for a total employee base of 10,000 workers. Also expanding its operations is International Paper, a global leader in packaging and paper products that plans to reinvest more than \$90 million over the next five years by reopening its Pensacola Containerboard Mill in Cantonment. In addition to the private employers listed in Table 2-14, Escambia County is a significant employer in the county, with 2,445 employees.

Table 2-14: Top Private Employers in Greater Pensacola Area

Company	Employees	Company Description	Headquarters
Baptist Health Care	5,571	Healthcare	Pensacola, FL
Sacred Heart Health Systems	4,820	Healthcare	St. Louis, MO
Navy Federal Credit Union	4,818	Financial Service Center	Vienna, VA
Gulf Power Company	1,774	Electric Provider	Pensacola, FL
West Florida Healthcare	1,200	Healthcare	Nashville, TN
Ascend Performance Materials	830	Manufacturing	Houston, TX
West Corporation	800	Business, Processing, Outsourcing	Omaha, NE
Santa Rosa Medical Centers	521	Healthcare	Milton, FL
Medical Center Clinic	500	Healthcare	Pensacola, FL
International Paper	475	Manufacturing	Memphis, TN
CHCS Services/Gate	409	Customer Service Center	Pensacola, FL
Blackwater Correctional Facility	348	Business Services	Milton, FL

Source: Greater Pensacola Chamber of Commerce

Six major business parks are located within Escambia and Santa Rosa counties, including Airport Commerce Park, Port of Pensacola, and Pensacola Technology Campus in Pensacola, Central Commerce Park in Central Escambia, and Century Industrial Park in Century (see Figure 2-3).

Figure 2-3: Escambia and Santa Rosa Business Parks



Source: Greater Pensacola Chamber of Commerce

Table 2-15 lists employment by industry in Escambia County. Trade, transportation, utilities, and professional and business service employment constitute the largest sources of employment.

Table 2-15: Employment by Industry in Escambia County

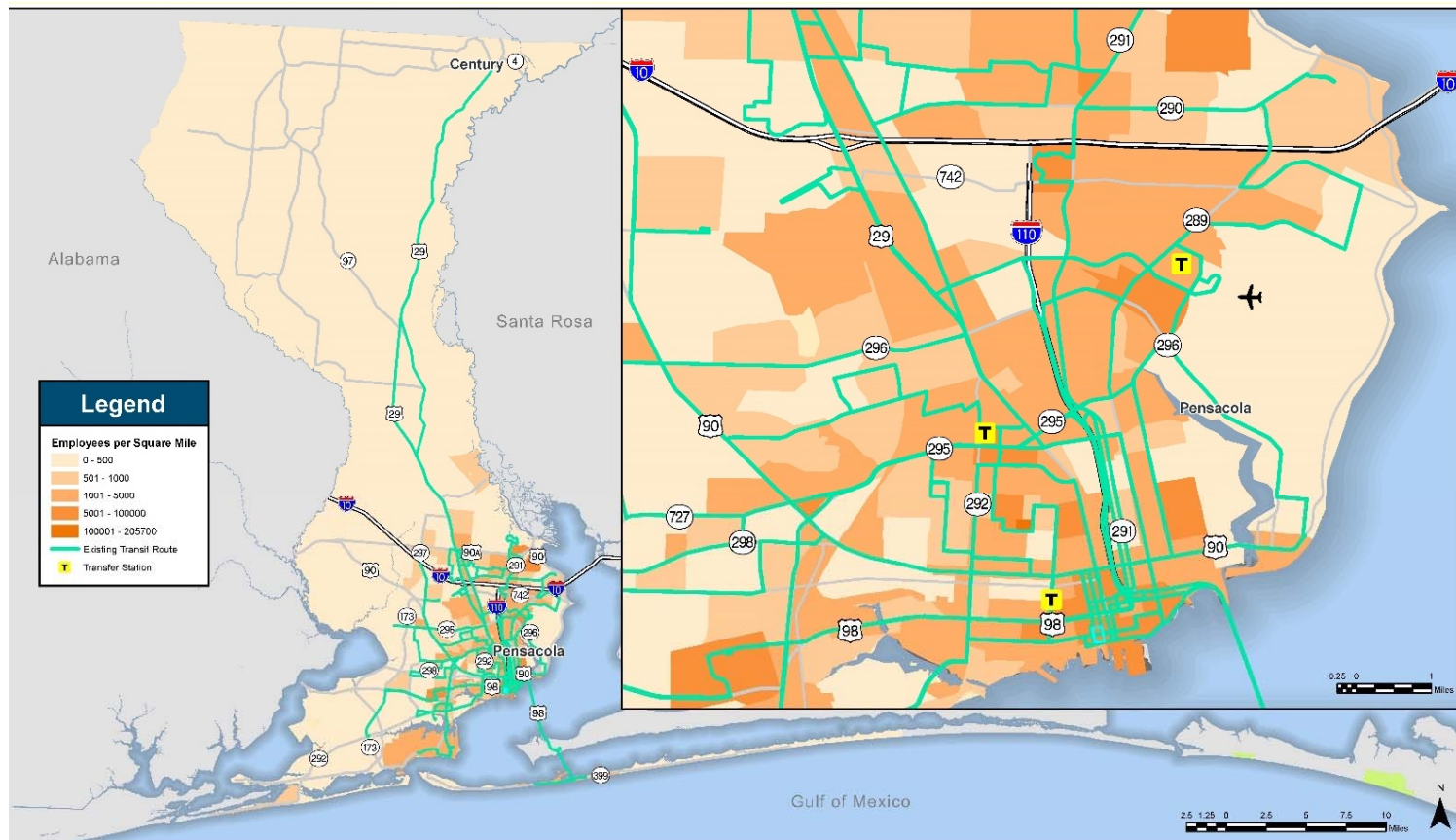
Category	
All Industries Total	8,198
Natural Resource & Mining	0.3%
Construction	11.3%
Manufacturing	3.0%
Trade, Transportation and Utilities	22.3%
Information	1.3%
Financial Activities	10.2%
Professional & Business Services	18.3%
Education & Health Services	11.2%
Leisure and Hospitality	10.5%
Other Services	9.1%
Government	1.8%

Source: Census Quick Facts Escambia County

Similar to the Escambia County, the main economic industries within the greater Florida–Alabama TPO region are military, defense industries, tourism, education, agriculture, banking, and healthcare. There are also other modest industries such as retail and some manufacturing, shipping, and storage.

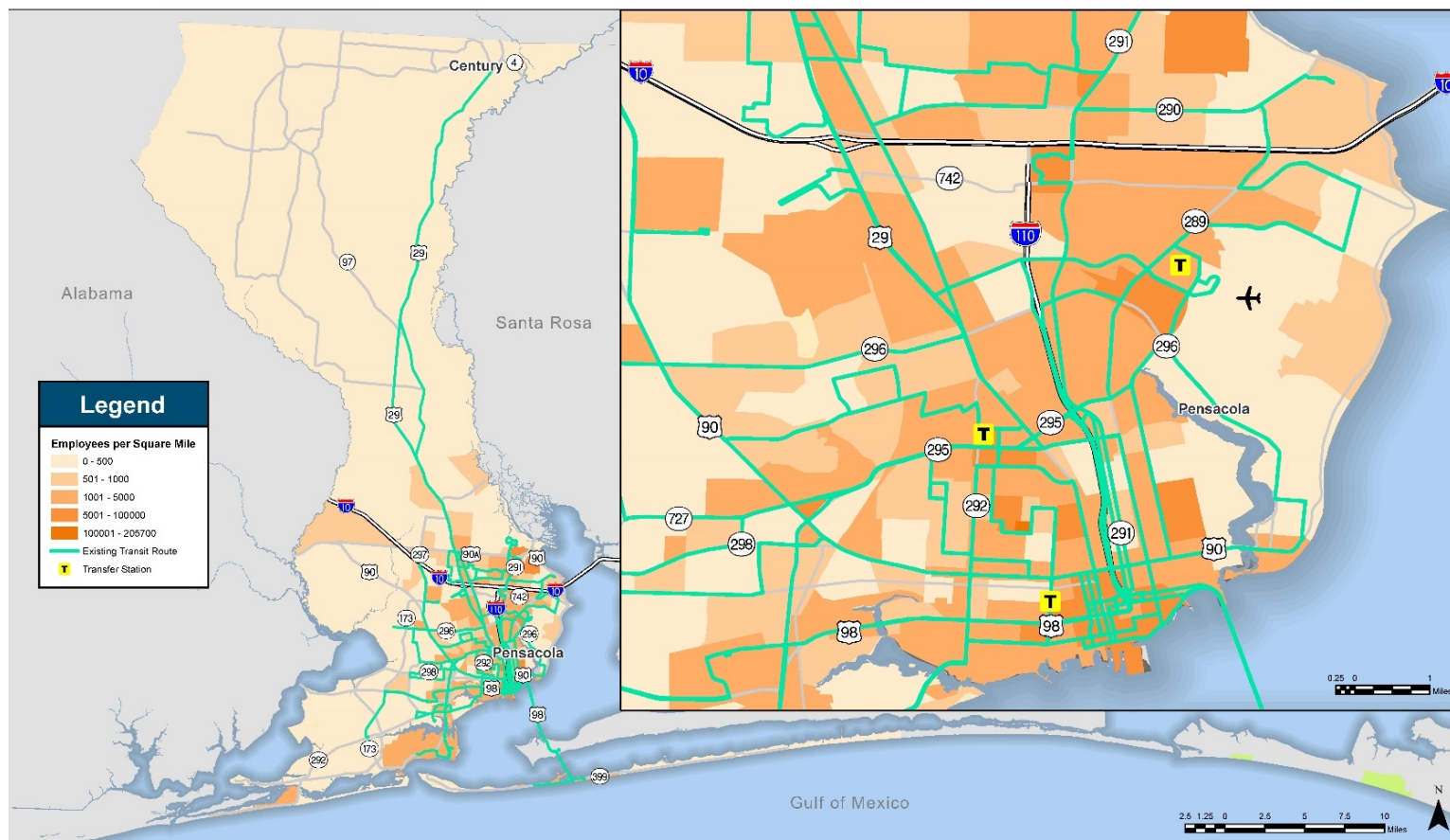
Maps 2-8 and 2-9 illustrate the employment density by Traffic Analysis Zone (TAZ) for both 2017 and 2026. These employment data are based on socioeconomic data from the NWFRPM. Like population density, Escambia County also has a relatively high employment density throughout the Pensacola area, especially in Ferry Pass, downtown Pensacola, the westernmost side of Warrington, and pockets within West Pensacola. Notable increases in employment density are projected to occur along US 29, the western side of Escambia County below I-10, and Cantonment.

Map 2-8: Existing Employment Density (2017)



Employment Density 2017

Map 2-9: Projected Employment Density (2026)



Employment Density 2026

Journey-to-Work Characteristics

Journey-to-work characteristics for Escambia County were compiled from the ACS and are shown in Table 2-16. The journey-to-work characteristics analyzed in these tables are presumed to be typically conducive to transit use. These characteristics include mode of transportation to work, travel time to work, departure time to work, mode of transportation by occupation type, and destination of work trip.

As typical in most Florida communities, the primary mode of commuting to work is by driving alone. Today, only 0.6% of commuters in the county travel to work using public transportation; this is an important consideration when determining the potential market of choice riders for transit. Approximately 50% of commutes are less than 20 minutes, with most commute times between 10 and 19 minutes, indicating that commuters must travel a moderate distance (outside of the typical walking distance) between work and home. The mean travel time for Santa Rosa County residents is longer at 27 minutes according to the 2014 5-year ACS. The majority of commuters leave for work during the traditional peak hour of travel of 6:00–8:00 AM, which is consistent with the typical commuting patterns throughout the state.

Table 2-16: Escambia County Commuting Characteristics

Characteristic	2014
Mode to Work	
Drove alone	86.3%
Carpooled	10.5%
2-person carpool	8.3%
3-person carpool	1.6%
4+-person carpool	0.5%
Workers per car, truck, or van	1.07
Public transit	0.6%
Walked	2.1%
Worked at home	9.4%
Bicycle	0.3%
Taxicab, motorcycle, or other	9.4%
Travel Time to Work	
< 10 minutes	11.1%
10–19 minutes	39.2%
20–29 minutes	27.1%
30–44 minutes	14.5%
45+ minutes	8.10
Departure Time to Work	
Before 6 AM	11.8%
6:00–6:59 AM	22.6%
7:00–7:59 AM	14.0%
8:00–8:59 AM	12.2%
9:00 AM–12:00 PM	23.8%

Source: 2010–2014 ACS

With respect to occupation, transit riders who work in service, sales and office occupations make up the majority of transit riders, consisting of about 37.4% and 37.9% of transit riders, respectively (see Table 2-17). Management, business, science and arts occupations make up the next highest percentage of occupation types, representing 15.3% of transit riders.

Table 2-17: Escambia County Commuting Characteristics

Occupation	Total Estimate	Drove Alone	Carpooled	Used Public Transit	Walked	Used Taxi, Motorcycle, Bicycle, etc.	Worked at Home
Total	134,469	101,949	14,101	818	2,889	2,084	12,628
Management, business, science, and arts occupations	41,410	33.3%	25.8%	15.3%	15.2%	21.6%	22.2%
Service occupations	25,952	18.7%	25.6%	37.4%	16.3%	28.9%	15.4%
Sales and office occupations	35,483	29.0%	24.8%	37.9%	12.2%	16.8%	11.1%
Natural resources, construction, and maintenance occupations	12,424	8.5%	13.8%	3.7%	9.4%	10.5%	10.7%
Production, transportation, and material moving occupations	12,244	9.3%	9.0%	5.7%	3.2%	19.5%	7.4%
Military-specific occupations	6,956	1.3%	1.0%	0.0%	43.8%	2.6%	33.2%

Source: 2010-2014 ACS

Table 2-18 summarizes the employment location of Escambia County residents. Based on 2014 ACS data, Escambia County had 134,469 employed residents, of which 90% lived and worked within the county, indicating a high demand for local employment-based trips. In addition, 5.8% of employed residents commuted to other counties, the majority working in Santa Rosa County and some working in both Baldwin and Okaloosa counties. The majority of workers whose work place is in Escambia County, but whose residence is outside of Escambia County, commute from Santa Rosa County. These workers represent 20,296 daily trips from Santa Rosa County.

Table 2-18: Escambia County Employment by Location (2014)

Place of Work	Estimated #
Total	134,469
Worked in state of residence	95.8%
Worked in county of residence	90.0%
Worked outside county of residence	5.8%
Worked outside state of residence	4.2%

Source: 2014 ACS 1-Year Estimates

Economic Conditions

Major Activity Centers

Major trip attractors are places that have the highest need for residents, such as medical services, educational facilities, shopping establishments, and government services. Major trip attractors in Escambia County include military installations, colleges and universities, major retail establishments, and hospitals and clinics. Tables 2-19 and 2-20 list the top 20 trip attractors and the largest education institutions, respectively. These establishments, in addition to other major types of trip attractors such as retail, major employers, and government offices in Escambia County, are illustrated in Map 2-10 by type.

Table 2-19: Top 20 Trip Attractors in Escambia County

Company Name	Description	Location
Baptist Hospital–Towers Bldg	Artificial Limbs	1000 W Moreno St
Fariha Abbasi, MD	Physicians & Surgeons	8333 N Davis Hwy
Baptist Health Care	Laboratories-Medical	1717 N E St
Baptist Hospital Infusion Center	Clinic	1717 N E St
Baptist Medical Park	Physicians & Surgeons	9400 University Pkwy
Accumed Home Health of Florida	Home Health Service	5401 Corporate Woods Dr
Escambia Community Clinics	Clinic	2200 N Palafox St
Corry Station	Federal Govt–National Security	640 Roberts Ave # 20, Pensacola
Pensacola Naval Air Station	Federal Govt–National Security	280 Taylor Rd, Pensacola
Pensacola State College	Book Dealer-Retail	1000 College Blvd # 12, Pensacola
Renal Care Group	Clinic	8187 W Fairfield Dr, Pensacola
Pyramid, Inc.	Janitor Service	7309 W Hwy 98, Pensacola
Walmart Supercenter	Department Store	4600 Mobile Hwy, Pensacola
Walmart Supercenter	Department Store	2650 Creighton Rd, Pensacola
Rehabilitation Institute	Occupational Therapist	8391 N Davis Hwy, Pensacola
University of West Florida	Academic University	11000 University Pkwy, Pensacola
Sacred Heart Health System	Hospitals	5151 N 9th Ave, Pensacola
Walgreen's	Pharmacy	700 N Pace Blvd, Pensacola
Fresenius Medical Care North	Dialysis Clinic	1040 E Nine Mile Rd, Pensacola
Di Vita Dialysis	Dialysis Clinic	598 W Fairfield Dr, Pensacola

Source: Pensacola Bay Transportation (2009)

Table 2-20: Educational Institutions

Company Name	Enrollment*
University of West Florida	12,000
Pensacola State College	12,000
Pensacola Christian College	4,000
Escambia County School District	11,000

*Figures are approximate

Source: Pensacola Bay Transportation (2009)



Major Activity Centers



Photo source: www.uwf.edu



Photo source www.pensacolastate.edu



Photo source: www.simon.com



Photo source: wpglimcher.com

Table 2-21 lists the major retail centers in Escambia County. Cordova Mall is the largest shopping center along the western panhandle, with 6 anchor stores and more than 120 specialty stores in 861,000 square feet of retail. Other notable centers are the Town and Country Plaza and the University Town Plaza.

Table 2-21: Major Retail Centers

Retail Center	Location	Description
Cordova Mall	5100 N 9th Ave, Pensacola	120+ specialty stores and restaurants
Town and Country Plaza	3300 N Pace Blvd, Pensacola	235,408 total sf
University Town Plaza	7171 N Davis Hwy, Pensacola	2 anchor stores, 3 specialty stores, 1 hotel

Tourism

Tourism is a vital component to the Pensacola Bay Area's economy. Escambia County is the 8th most popular county for visitors according to the 2012 Florida Visitor Study. According to UWF's Office of Economic Development and Engagement, the tourism industry in Escambia County is estimated to employ more than 14,000 employees in the accommodation and food services industry and nearly 2,400 employees in the arts, entertainment, and recreation industry. Downtown Pensacola, Gulf Breeze, Pensacola Beach, and Perdido Key attract a substantial proportion of the 14 million visitors that visit Northwest Florida annually. Visitor levels continue to rise, according to the Escambia County tourism metrics for tax

collections, with increased visits to the Pensacola Visitor Information Center, hotel occupancy rates, length of hotel stays, and visitor spending. The majority of dwellings units termed “vacant” by Census definition are seasonal vacancies/vacation rentals, many of which are in Panama City Beach and Perdido Key. Visitor levels tend to peak in the summer season, which is when transportation systems are most impacted and congestion is highest. Map 2-11 illustrates the location of major entertainment and recreation attractors such as community centers found in Escambia County.



Photo source: www.visitpensacola.com

The Pensacola Bay Area offers several activities for tourists, including museums, attractions, parks, water recreation, and beaches. Area attractions include sailing trips, parasailing, fishing, golf courses, Historic Pensacola Village, the National Naval Aviation Museum, the Museum of Commerce, the Museum of Industry, the National Flight Academy, the Pensacola Bay Center, the Pensacola Children’s Museum, music halls, and Devilliers Cultural Heritage Museum. Among the natural parks enjoyed by both residents and visitors are the Gulf Islands National Seashore and Big Lagoon State Park.

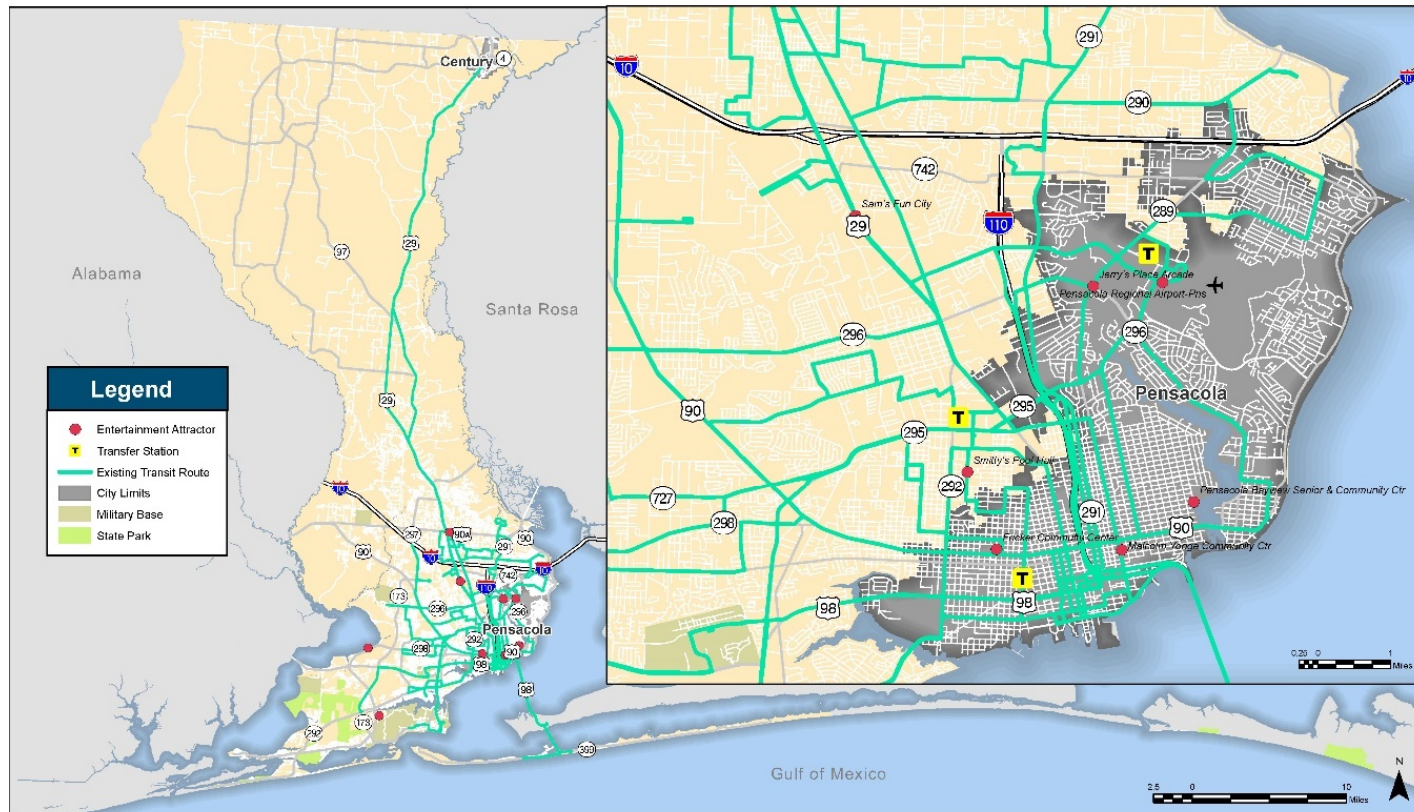
Pensacola Naval Air Station

The military is another top economic driver for Escambia County. The Naval Air Station (NAS) Pensacola, home of the Blue Angels, is the premier naval installation in the US Navy and is primarily dedicated to the training of Navy, Marine Corps, and Coast Guard personnel in naval aviation. NAS Pensacola employs more than 16,000 military and 7,400 civilian personnel, including the Naval Aviation Schools Command, the Naval Air Technical Training Center, Marine Aviation Training Support Groups 21 and 23, the Blue Angels, and the headquarters for Naval Education Training Command, a command that combines direction and control of all Navy education and training.

Pensacola International Airport

Pensacola International Airport is owned and operated by the City of Pensacola. It currently has two runways for six major airlines that transport people and cargo in and out of the region, including UPS. The airport has 350+ acres of land available for new development of Maintenance Repair and Overhaul (MRO) facilities, cargo handling, aviation, commerce, and mixed-use property with easy access to interstate, port, and rail services.

Map 2-11: Entertainment Attractors



Entertainment Attractors

Source: Pensacola Bay Transportation (2009)

Roadway Conditions

Existing Roadway Conditions

Existing roadway conditions are also considered for the baseline conditions assessment. As part of the update to the Florida–Alabama TPO’s Congestion Management Process Plan, corridors that are currently severely congested (operating at level of service [LOS] “E” or “F”) were identified in the Florida–Alabama TPO’s Transportation Vision 2040 LRTP draft report. The following roadway segments in Escambia County had a failing level of service in 2013:

- SR 10 (US 90A) / Nine Mile Road from SR 297 / Pine Forest Road to US 29 / SR 95
- SR 10A (US 90) / Mobile Highway from Fairfield Drive / SR 727 to Kirk Street
- SR 10A (US 90) / Scenic Highway from Strong Street to Hyde Park Road
- SR 10A (US 90) / Scenic Highway from Hyde Park Road to Summit Boulevard
- SR 95 (US 29) / Pensacola Boulevard from I-10 / SR 8 to Nine Mile Road / SR 10 / US 90A
- SR 173 / Blue Angel Parkway from Lillian Highway / SR 298 to Saufley Field Road / CR 296
- SR 291 / Davis Hwy from I-10 / SR 8 to University Parkway
- SR 292 / Gulf Beach Hwy from Fairfield Drive / SR 727 to Navy Boulevard / SR 295
- SR 295 / Navy Boulevard from SR 292 / Barrancas Avenue to SR 295 / New Warrington Road
- SR 297 / Pine Forest Road from I-10 / SR 8 to Nine Mile Road / US 90A / SR 10
- SR 727 / Fairfield Drive from Lillian Highway / SR 298 to Mobile Highway / US 90 / SR 10A
- CR 295A / Saufley Field Road from Mobile Highway to Blue Angel Parkway
- Main Street from Baylen Street to Tarragona Street

Future Roadway Conditions

According to the Florida–Alabama TPO’s Transportation Vision 2040 LRTP draft report, several segments of major roadways, including Bayfront Parkway, Burgess Road (SR 742), I-10, US 90A, Blue Angel Parkway (SR 173), and SR 292, are projected to become congested. It is estimated that without improvements, travel times are anticipated to increase by up to 20% by 2040.

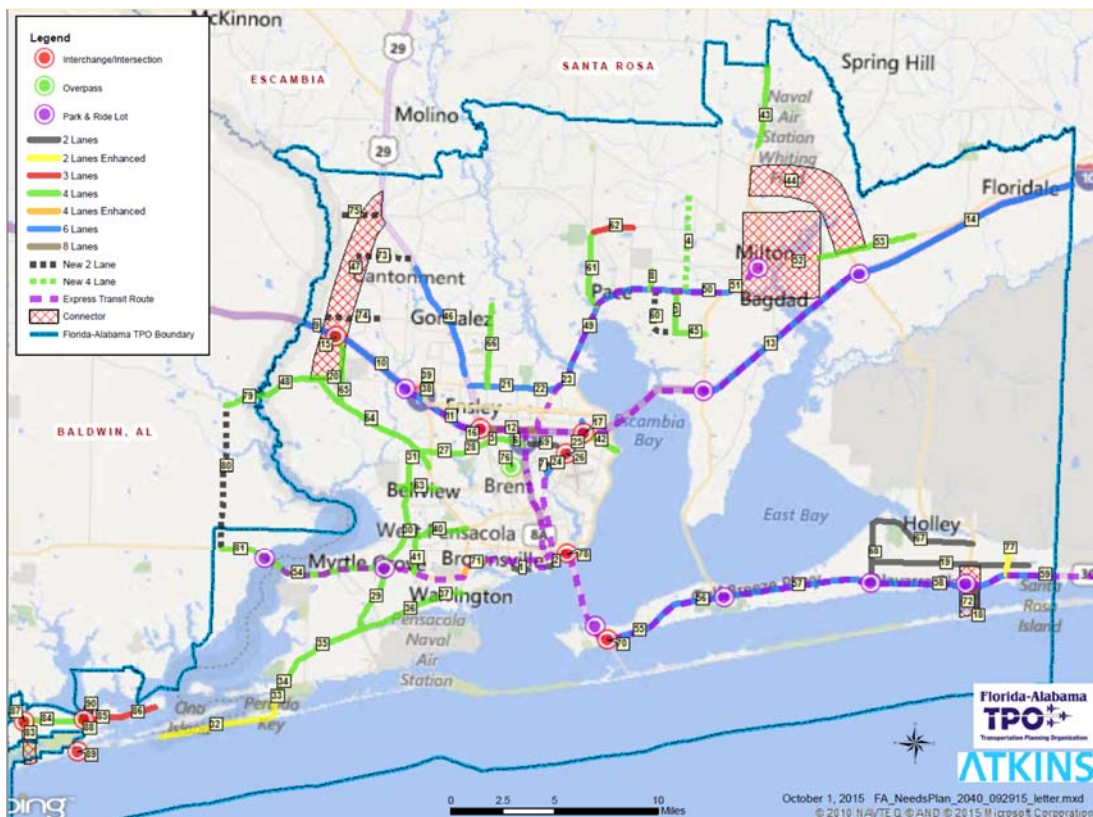
Figure 2-4 illustrates the roadways that are projected to be congested, very congested, or borderline congested if no additional improvements are made through 2040. Figure 2-5 illustrates the 2040 Needs Plan Projects, including several roadway expansions, intersection improvements, park-and-ride lots, and express transit routes. The 2040 Needs Plan was adopted on June 10, 2015, and is estimated to cost \$2.4 billion if implemented. The 2040 Cost Feasible Plan includes express transit routes on US 90, I-10, I-110, and SR 291, as illustrated in Figure 2-6.

Figure 2-4: 2040 Florida–Alabama TPO Roadway Conditions



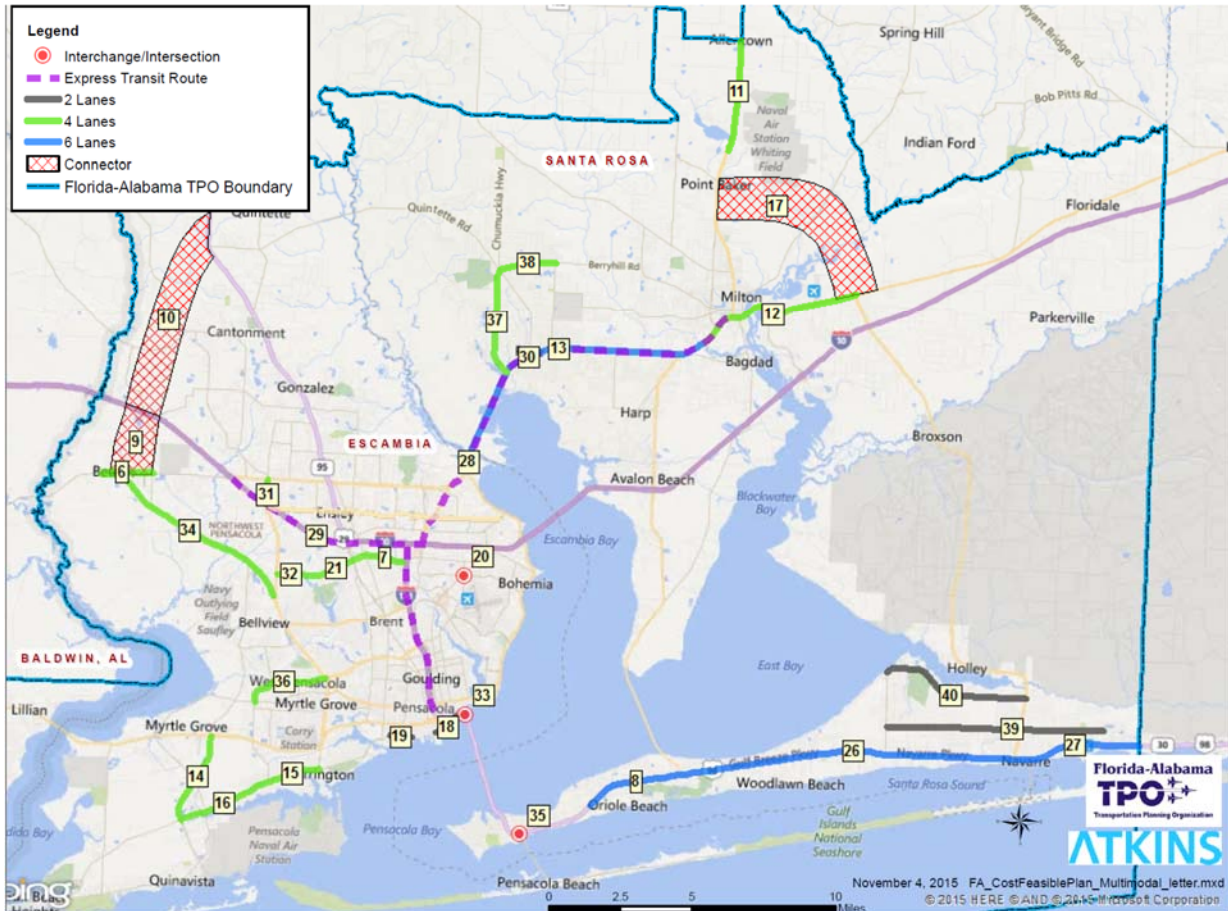
Source: Florida-Alabama TPO 2040 LRTP (Draft)

Figure 2-5: 2040 Adopted Needs Plan Projects



Source: Florida-Alabama TPO 2040 LRTP Draft

Figure 2-6: 2040 Cost Feasible Plan Non-SIS Projects



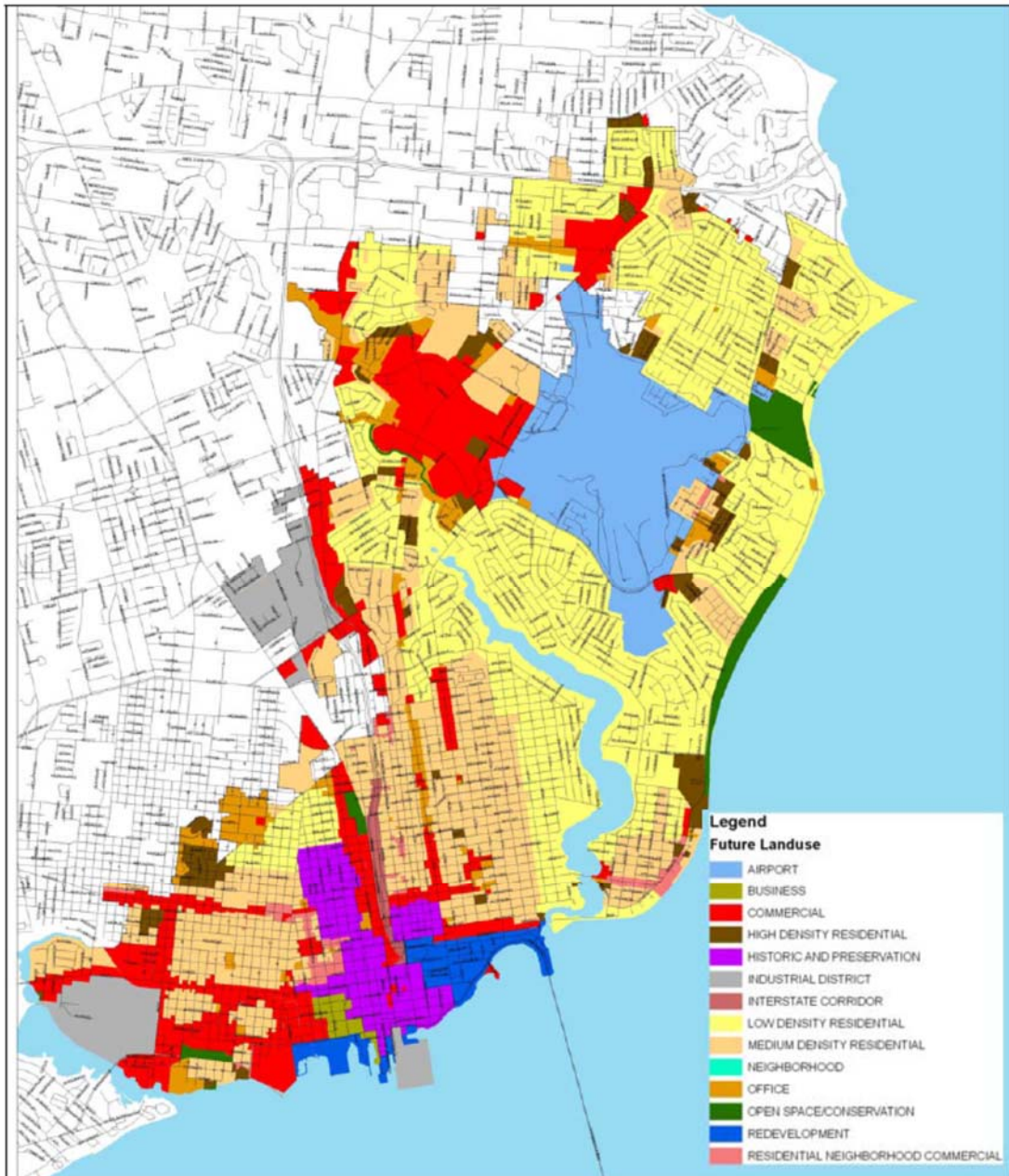
Source: Florida-Alabama TPO 2040 LRTP Draft

Land Use

A review of current and emerging land uses was conducted for the baseline conditions assessment. Current and future land use maps from the 2030 Escambia County Comprehensive Plan (February 2015) and the City of Pensacola Comprehensive Plan (July 2011), shown in Figures 2-7 and 2-8, respectively, were reviewed. From this review, the following key trends were observed:

- Within Pensacola, a substantial concentration of commercial land use that is surrounded by medium-density residential use is zoned along the corridors of US 29, US 98, E Heinberg Street, SR 291, and N 9th Avenue.
- Low-density residential is located primarily in the eastern side of Pensacola, especially in the area surrounding the Bayou Texar.
- The northern section of the county is largely zoned for agricultural land use, with the exception of the industrial areas in the town of Century and dispersed areas for conservation and recreation.

Figure 2-8: City of Pensacola Proposed Future Land Use Map



Source: City of Pensacola Comprehensive Plan

Section 3: Existing Transit Service

Escambia County took over operations of the private transit system in Pensacola in 1950. ECAT offers fixed-route bus service primarily in Pensacola and limited paratransit service countywide. This section describes in detail the transit services provided by ECAT. It is followed by a review of the other transportation providers and a trend and peer system analysis for ECAT's fixed-route service and paratransit service.

Routes Description

ECAT currently provides 25 fixed routes in Escambia County, including the Route 59 Express, Beach Jumper (Route 64), UWF Trolley, and Beach Trolley. Most of the fixed-route bus service is within the Pensacola area, but service also reaches the Century Courthouse, Gulf Breeze, Pensacola Beach, and the Pensacola NAS. Three hubs serve as major transfer stations for the fixed-route services—ECAT Transfer Center (Rosa L. Parks Complex), Pensacola State College PSC Transfer Center, and Downtown Transfer Center. The ECAT Transfer Center is located next to Town and Country Plaza, the Juvenile Justice Center, the Sheriff's Department, and the Escambia County Health Department. The Downtown Transfer Center is located next to the MC Blanchard Judicial Center and City Hall. UWF has three trolleys that service the campus area, one of which is an express route with an extended service area that connects to Target and Argo Village.

The majority of ECAT routes run service Monday through Friday, with some routes also operating on Saturday and Sunday. All buses are wheelchair-accessible and are equipped with bicycle racks for two bicycles. Most routes operate between 6:00 AM and 7:00 PM on weekdays with 60-minute headways. Saturday service is generally limited to two-hour headways.

Map 3-1 illustrates the bus routes operated by ECAT. Also included on the map are the $\frac{1}{4}$ -mile and $\frac{3}{4}$ -mile buffer service areas. The $\frac{1}{4}$ -mile buffer represents the maximum distance that riders typically are willing to walk to get to a bus. The $\frac{3}{4}$ -mile buffer indicates the service area where complementary Americans with Disabilities Act (ADA) paratransit service must be provided. Table 3-1 shows characteristics of routes currently operated by ECAT.

Map 3-1: Existing Transit Service Area

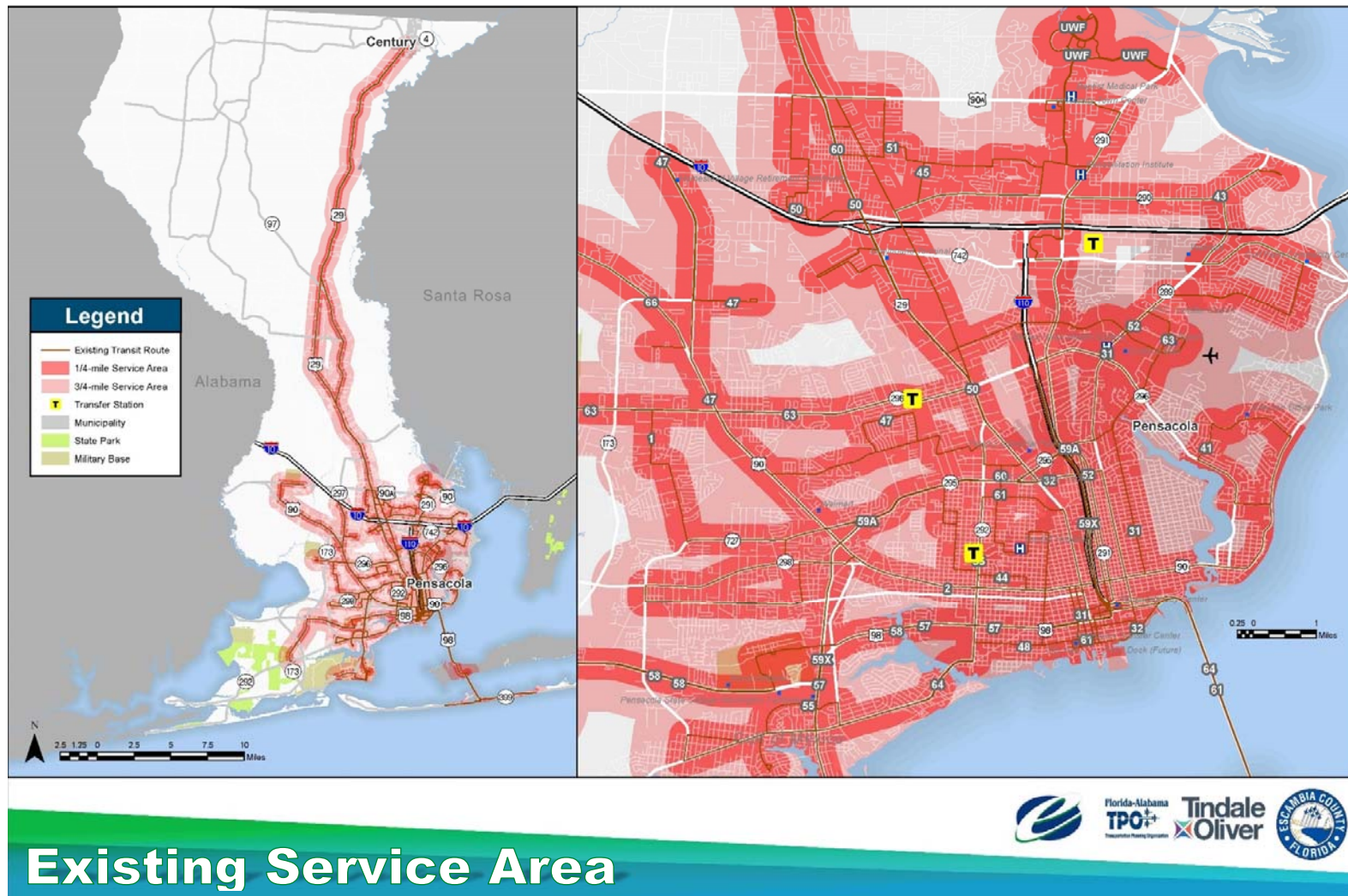


Table 3-1: ECAT Route Inventory and Characteristics

Route No.	Key Location/Corridors Served	Frequency (min)	Hours
1	Oakcrest/Cerny Heights along Mobile Hwy, Fairfield Dr, Sauflay Field Rd, Patricia Dr, ECAT Transfer Ctr, Walmart	W 60 S 120	W 5:30 AM-6:25 PM S 7:30 AM-6:25 PM
2	Brownville/Myrtle Grove, ECAT Transfer Ctr, Downtown Transfer Ctr, ECAT Transfer Ctr	W 60 S 120	W 5:00 AM-7:25PM S 6:00 AM-7:25 PM
31	Cordova Mall, PSC Transfer Center, Target, Cervantes Street Downtown Transfer Center,	W 60 S 120	W 6:00 AM-5:55 PM S 7:00 AM-5:55PM
32	9 th Ave/Pensacola State College, ECAT Transfer Ctr, Downtown Transfer Ctr, Texar Dr at 9 th Ave	W 60 S 120-240	W 6:00 -6:55 PM S 7:00 AM-5:55 PM
41	12 th Avenue/East Pensacola, Downtown Transfer Center, Bayou Blvd	W 40	W 6:00 AM-6:25 PM
43	UWF/Scenic Heights, PSC Transfer Ctr, Spanish Trail, Moorings Apts, West Florida Hospital, UWF School of Science and Engineering, Target at University Parkway	W 60 S 120	W 5:30-6:55 PM S 5:30 AM-6:55 PM
44	Brownsville/North Hill, ECAT Transfer Ctr, Downtown Transfer Ctr, Englewood Senior Apts, Social Security Office	W 60 S 120	W 5:00 AM-6:55 PM S 7:00 AM-5:55 PM
45	Davis Hwy, West Florida Hospital, University Town Plaza, ECAT Transfer Ctr, Downtown Transfer Ctr	W 15-30 S 60	W 5:30 AM-7:25 PM S 6:00 AM-6:55 PM
47	Bellview/Montchair, George Stone Technical College, Homestead Village and Retirement Residence, Industrial Park, Oakwood Terrace, Town and Country Plaza, ECAT Transfer Ctr, Pine Forest Rd, Mobile Hwy	W 60 S 120	W 5:30-6:55 PM S 6:00 AM-6:55 PM
48	Baptist Hospital/MC Blanchard, ECAT Transfer Ctr, Pensacola Retirement Village, Downtown Transfer Ctr	W 60 S 120	W 5:30 AM-7:25 PM S 6:30 AM-5:25 PM
50	Wedgewood/Lincoln Park, Greyhound Bus Depot, Sacred Heart Medical Group, Children and Families, Brentwood Shopping Ctr, ECAT Transfer Ctr	W 60 S 120	W 5:00 AM-7:55 PM S 6:00 AM-7:55 PM
51	Ensley/Brentwood Shopping Ctr, Walmart, Greyhound Bus Depot, ECAT Transfer Ctr, Palafox St, Pensacola Christian School, Florida Highway Patrol	W 60 S 120	W 5:30 AM-6:25 PM S 7:30 AM-6:25 PM
52	ECAT Transfer Ctr, Pensacola Village Apts, Cordova Mall, Sacred Heart	W 30-60 S 120	W 6:00 AM-7:25 PM S 6:00 AM-6:55 PM
55	Warrington/Navy Point, ECAT Transfer Ctr, Pace Blvd, Barrancas Ave, Forest Creek Apts, Walmart	W 60 S 120	W 6:00 AM-6:55 PM S 6:00 AM-6:55 PM
57	NAS Pensacola/Downtown, Corry Station	W 60 S 120	W 6:00 AM-6:55 PM S 6:00 AM-6:55 PM
58	Corry Station/Naval Hospital, VA Clinic, Target, Walmart, Downtown Transfer Ctr, Highway 98	W 120 S 120	W 5:30 AM-7:25 PM S 7:30 AM-7:25 PM
59A	Naval Air Technical Training Center/Pensacola International Airport, Corry Station Recreation and Bowling Center, ECAT Transfer Center, VA Clinic, Downtown Transfer Center,	W 40-100 WE 40-120	W 1:55 PM-10:00 PM S 10:30 AM-10:00 PM

Route No.	Key Location/Corridors Served	Frequency (min)	Hours
59 Express	Corry Station/NAS Pensacola/Cordova Mall, Naval Air Technical Training Ctr, Downtown Pensacola	W 50-100 W 40-120	W 1:55 PM-10:00 PM S 10:30 AM-10:00 PM
60	Century Courthouse, Cantonment, ECAT Transfer Ctr along US 29	W 6 hrs	W 5:20 PM-7:55 PM
61	ECAT Transfer Center, Park-n-Trolley Lot, Gulf Breeze Hospital, Pensacola Beach Visitor Center, Downtown Transfer Center	W, S 210-300	W+S 8:00 AM-6:00 PM
63	PSC Transfer Center, Michigan Ave, Saufley Field Gate, Pensacola International Airport	W 60 S 120	W 6:00 AM-6:20 PM S 8:00 AM-5:20 PM
64 Beach Jumper	NAS Pensacola USO, downtown Pensacola, Casino Beach Pavilion	W 100 S 100	W 2:50 PM-9:30 PM S 10:40 PM-9:05 PM
UWF Trolley	Village West, Martin Hall, Argo Hall, Commons, Target	W 5-15 S 60	W 6:55 AM-8:45 PM S 11:10 AM-5:40 PM
Jury Trolley	Pensacola Bay Center Park-n-Trolley lot, county courthouse, federal courthouse		W 7:00 AM-5:00 PM

W = Weekdays WE = Weekends S = Saturday

Fares

The base fare for most ECAT routes is \$1.75. Discounts are available for seniors, Medicare cardholders, students, and retired and active military personnel with a military ID. Students in college or high school must present an ECAT student ID card or a high school or college ID to receive the student discount. ADA-certified Transportation ID cardholders and military personnel in uniform rider for free. Daily, weekly, and monthly passes are available for regular routes. Stored rides are passes that have no expiration unless fares change. Commuter routes 59A and 59/60/61 and the routes 64 Beach Jumper/65 Big Lagoon (seasonal) have a higher base fare of \$2.35. All cash fares include one transfer upon request. Students or children with a height equal to or shorter than the top of the fare box ride free. Table 3-2 lists the fares for the different categories.

Table 3-2: ECAT Bus Fare Rates

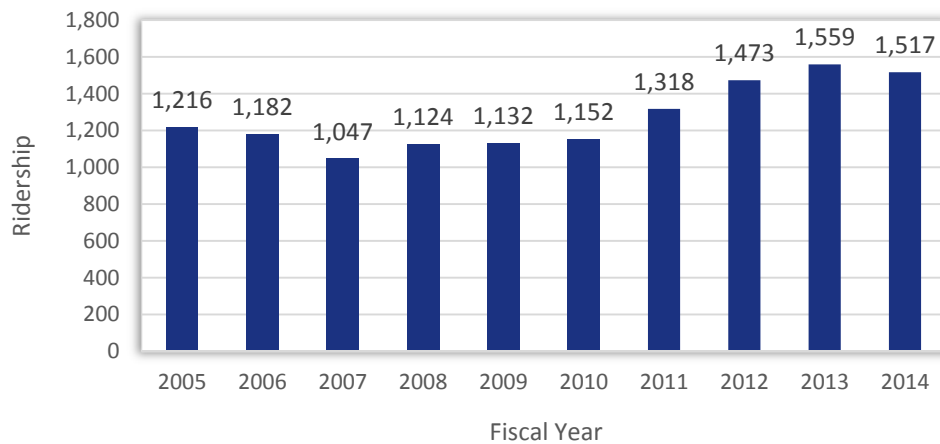
Category	Single Fare	Passes	Stored Ride	Commuter Routes 59A/59/60/61	Commuter Routes 64/65
Base fare	\$1.75	\$47.00 – 30 day \$14.50 – 7 day \$5.25 – 1 day	\$1.75 – 1 ride \$29.00 – 20 rides	\$2.35	\$2.35
Seniors or persons with disabilities	\$0.85	\$35.00 – 30 day	\$7.00 – 10 rides	\$1.10	\$1.10
Medicare cardholders	\$0.85		\$12.00 – 10 rides	\$1.10	\$1.10
Student (college*, high school*, middle school, elementary)	\$1.25		\$12.00 – 10 rides	\$1.75	\$1.75
ADA-certified transportation ID cardholders	Free			Free	Free
Military in uniform	Free			Free	Free
Not in uniform but with active military or retired military ID card	\$1.00			\$2.00	Free

*High school and college students must present their ECAT Student ID Card or a high school or college ID to receive \$1.25 fare. If a high school or college student cannot present an ECAT Student ID Card or a high school or college ID, they will pay full fare of \$1.75.
Source: ECAT

Ridership Trends

ECAT ridership increased 25% between 2005 and 2014, peaking in 2013 with nearly 1.6 million passenger trips (see Figure 3-1). Seasonally, ridership tends to peak during the summer and fall, especially from July to October. In examining ridership data from ECAT's 2014 Comprehensive Operational Analysis (COA) Final Report (see Table 3-3), the routes with the highest service levels also have the highest ridership. Route 45 has approximately 750 boardings per day, followed by Route 42 with 538, Route 2 with 509, and Route 55 with 418. The weekday system average is 254 boardings per day. Route 55 has the highest productivity,

Figure 3-1: ECAT Passenger Trips (000), 2005–2013



Source: Florida Transit Information System (FTIS) and NTD

Table 3-3: Weekday Performance Statistics by Route

Route	Weekday Service Hours	Weekday Boardings	Weekday Boardings per Hour
1	11.46	314	26.3
2	19.30	509	25.6
41	6.86	97	13.2
42	23.54	538	22.4
43	17.88	313	17.0
44	12.38	207	16.1
45	47.00	755	15.7
47	17.96	265	14.4
48	12.38	325	25.2
50	26.30	321	11.9
51	11.46	289	24.2
55	11.38	418	34.9
57	11.62	96	8.3
58	12.94	110	8.2
59A	6.00	4	0.7
59X	11.04	45	4.1
60	5.84	46	7.9
61	3.00	39	13.0
63	13.96	142	8.9
64 Beach Jumper	6.60	10	1.5

Source: ECAT COA Final Report December 2014

Future Passenger Rail

Amtrak service in Pensacola ceased operations in 2005 after Hurricane Katrina. A December 2015 report for the Southern Rail Commission (SRC) titled “Potential Gulf Coast Service Restoration Options” evaluated scenarios for restoring passenger rail services along the Gulf Coast, including the Florida Panhandle. From 1993 through 2005, Amtrak also operated an extension of the Sunset Limited Train through the region as part of a transcontinental Los Angeles-to-Florida run, but struggled with on-time performance for various reasons, including route length and carrier operating conditions. Following Hurricane Katrina in 2005, Sunset Limited service was suspended east of New Orleans. The rail service options for the Gulf Coast west of New Orleans include extending Amtrak’s New Orleans passenger train service from New Orleans to Orlando.

Other Transportation Service Providers

Other private and public agencies also offer transportation services for specific client groups, as shown in Table 3-4. These private transportation providers were contacted for general information about the services offered, and the information provided is summarized in the table.

Social service providers, such as those that provide transportation services to older adults or persons with disabilities, as well as other types of private and public transportation providers, were contacted for specific information about the services offered. Table 3-5 lists these social service providers and the information provided.

Table 3-4: Private Transportation Provider Inventory

Organizations	Address	Phone	Type	County Agreement?	Service Area	Service Frequency	Vehicle Type and Fleet Size	Seating Capacity	Daily Ridership	Wheel Chair Equipped	Coordinate with ECAT?
Greyhound	101 Perry Ave SE, Fort Walton Beach, FL	850-243-1940	Bus		Nationwide; local stop in Pensacola		Bus			No	No
Island Time Shuttle	23 E. Strong St. #4 Pensacola, FL	850-346-4460	Shuttle	No	Escambia, Okaloosa	24 hours with reservation	Cars	6 persons	1-3 trips	No	No
Sunshine Shuttle	323 Lynn Drive, Santa Rosa Beach, FL	850-650-6333	Shuttle/Limo	No	Florida	24/7	80 vehicles – limos, buses, motorcoaches, cars, SUVs, minivans	2–55 persons	10–600 persons	Yes	No
T-Mac Shuttle Service	Niceville, FL	850-217-9141	Shuttle	No	Florida	24/7	1 van	7 persons	1–2 persons	No	No
Uber	301 Vermont Street, San Francisco, CA		Taxi/ Ridesharing		Escambia, Santa Rosa, Okaloosa		personal cars				
Blue Marlin Water Taxi & Tours	5001 Grande Dr Pensacola, FL	850-723-4907									
Orange Beach Water Taxi	26350 Cotton Bay, Orange Beach, AL	(850) 332-6892									
Royal Taxi, Shuttle & Airport Transportation	4771 Bayou Blvd, Pensacola, FL	(850) 934-0123	Taxi/Shuttle								
A&J Transportation	1541 W Romana St, Pensacola, FL	(850)-346-1515	Non-emergency paratransit	No – private contractors							

Table 3-5: Social Service Provider Inventory

Organizations	Address	Phone	Type	County Agreement	Service Area	Service Frequency	Vehicle Type and Fleet Size	Seating Capacity	Daily Ridership	Wheel Chair Equipped	Coordinate with ECAT?
Granny Nannies Home Health Care	5669 Gulf Breeze Parkway, Suite B-12, Gulf Breeze, FL	850-995-0599	Medical CNA car shuttle for elderly	No	Santa Rosa, Escambia, Okaloosa, Walton		Personal vehicles	4 persons		No	No
Home Care Solutions LLC	25 E Wright St Suite 2512, Pensacola, FL	850-433-0733	Medical shuttle/car for clients only	No	Escambia, Okaloosa, Santa Rosa, Walton		Personal vehicle	4 persons		No	No
Northwest Florida Area Agency on Aging, Inc.	5090 Commerce Park Circle, Pensacola, Florida 32505	850-494-7101	Transp. sub-contract to another company; clients only		Northwest Florida						No
Comfort Keepers	1149 Creighton Rd #5, Pensacola, FL 32504	(850) 937-7642	Non-emergency medical transportation	No	Escambia, Santa Rosa, Bay	24/7	Caregiver's personal vehicle	4-5 persons	~19 persons	No	No
TLT Transport	3061 Chippewa Ln, Pace, FL 32571	850-995-9300	Non-emergency medical shuttle	No	Santa Rosa, Escambia	24/7	Fleet of vans	2 wheelchr, 2 ambulatory	4-5 persons	Yes	No
Veranda of Pensacola, Inc. (Retirement Center)	6982 Pine Forest Rd, Pensacola, FL 32526	(850) 332-0811	Non-emergency	No, only for residents	Escambia	24/7	1 limo, 1 bus		~ 5 persons	No	No
Brookdale Senior Living Solutions	8700 University Parkway Pensacola, FL 32501	850-583-3867	Shuttle bus	No, only for residents	within 15 miles of Escambia and Santa Rosa		1 bus	14 persons	Varies, 2-10	yes	No
Azalea Trace Retirement - Life Communities	10100 Hillview Dr, Pensacola, FL 32514	850-828-8274		No, only for residents							No

Organizations	Address	Phone	Type	County Agreement	Service Area	Service Frequency	Vehicle Type and Fleet Size	Seating Capacity	Daily Ridership	Wheel Chair Equipped	Coordinate with ECAT?
TLC Caregivers	4400 Bayou Blvd #9, Pensacola, FL 32503	850-857-0920	Non-emergency	No, only for residents	Escambia, Santa Rosa	24/7	Caregiver's personal Vehicle	4–5 persons		Yes/ not wheel chair equipped	No
Life Care Center of Pensacola	3291 E Olive Rd, Pensacola, FL 32514	850-494-2327		No, only for residents							No
Specialty Care Transporters Inc.	6984 Pine Forest Rd, Pensacola, FL 32526	850-476-3599	Non-emergency ambulatory	No, only for residents	Santa Rosa, Escambia	Mon–Sat 4am–11pm; Sun 4am–8pm	6 E 350, 2 vans, 1 bus		Varies	Yes	No
Homestead Village Florida, LLC	7830 Pine Forest Rd, Pensacola, FL 32526	850-941-5000	Non-emergency ambulance	No, only for residents	Escambia	Mon–Fri, 8am–2pm	1 bus, 1 car	4–15 persons	5–15 persons	Yes	No
Northpoint and Westpointe Retirement Community	5101 Northpointe Pkwy, Pensacola, FL 32514	850-484-8383	Non-emergency ambulance	No, only for residents		Mon and Wed	Limo, mini bus	6–12 persons	1–10 persons	No	No
Sabal House, Veritas InCare LLC	150 Crossville St, Cantonment, FL 32533	850-477-1312		No, only for residents							No
University Pines-Holiday Retirement	8991 University Pkwy, Pensacola, FL 32514	850-851-0361	Non-emergency basic transp.	No, only for residents	Escambia	M–F	1 bus	16 persons	Varies, 8–15 persons	No	No
American Cancer Society Road to Recovery	5401 Corporate Woods Drive, Suite 100 Pensacola, FL 32504	(850) 475-0850	Non-emergency		Escambia						
Vets to VA Clinics Veterans Memorial Foundation	5191 C Willing Street, Milton, FL 32570	(850) 981-2653	Non-emergency	For Santa Rosa Veterans Only	Escambia Santa Rosa					Yes	

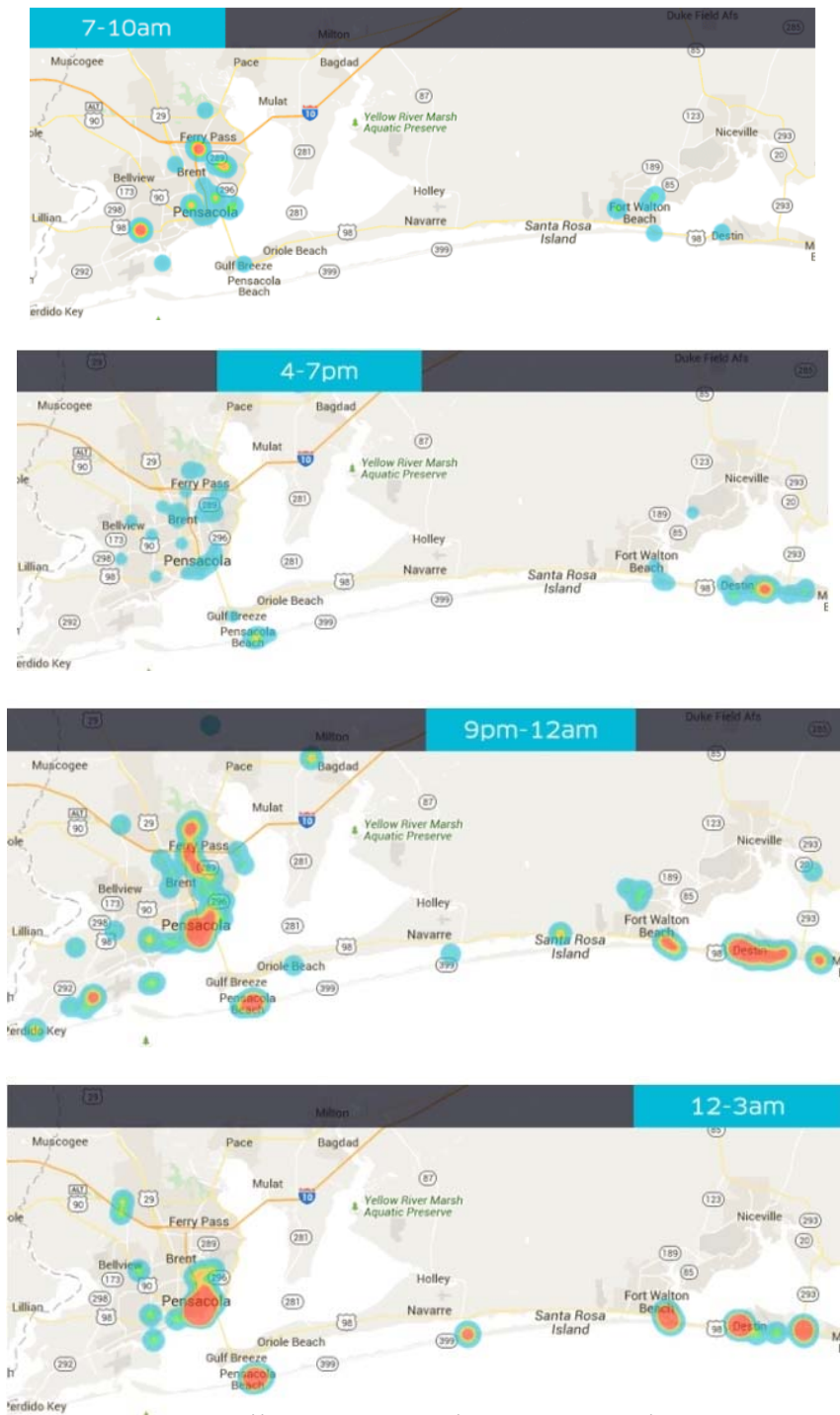
Uber

Uber is an international ridesourcing service headquartered in San Francisco. The service is similar to a taxi service except it connects drivers to consumers using a mobile application. Consumers use their smartphone to make a trip request, which is then routed to the nearest Uber driver. Uber drivers then use their personal car to transport consumers to their destination. Uber and other similar ridesourcing services are growing in popularity, especially among young adults and, in many locations, complement gaps in transit services by helping riders complete the “first/last mile” leg of their trip or by providing late service when transit is not operating. Uber drivers already provide service in the Pensacola Bay area. Figure 3-2 illustrates the demand hotspots for Uber in the northwest Florida region. The service demand peaks in the late evening hours in the coastal areas of downtown Pensacola, Pensacola Beach, and the University Town Plaza area.

Uber Airport Agreement

Uber reached an interim agreement with Pensacola International Airport (PNS) in 2014 that allows Uber drivers to use common-use airport roadways for ingress and egress to and from the airport. The agreement was extended in November 2015 and provides both its partners and riders with clear instructions on how to make pickups at PNS. A dedicated pickup location was established, and riders are directed to the beginning of the terminal in the non-commercial lane to make pickups quickly and easily. Figures 3-3 and 3-4 illustrate the waiting area and pick-up area for Uber drivers and users, respectively.

Figure 3-2: Uber Demand Hot Spots by Time of Day



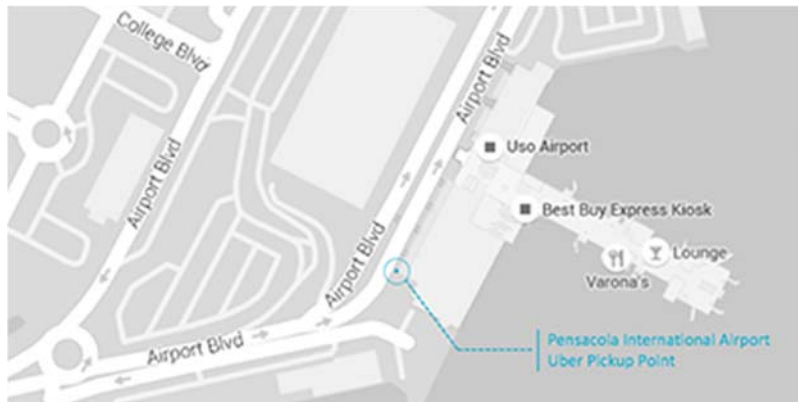
Source: <http://uberflpartners.com/pensacola-demand/>

Figure 3-3: Airport Waiting Area for Uber Drivers



Source: <http://uberflpartners.com/pensacola-airport>

Figure 3-4: Uber Airport Pick up Area



Source: <http://uberflpartners.com/pensacola-airport>

Trend Analysis and Peer Review

To assess how efficiently ECAT supplies fixed-route transit service and how effective those services meet the needs of the area, a trend analysis of critical performance indicators was conducted to examine the performance of its fixed-route services over a five-year period. To complete this peer and trend analysis, data from the Florida Transit Information System (FTIS) were used, which includes validated National Transit Database (NTD) data for fiscal years 2009–2014. The performance measures are used to present the

data that relate to overall system performance. Three categories of indicators and performance measures were analyzed for the trend analysis of the existing transit service:

- **General performance measures** indicate the quantity of service supply, passenger and fare revenue generation, and resource input.
- **Effectiveness measures** indicate the extent to which the service is effectively provided; can be used to implement goals towards improving the quality of service and customer satisfaction and increasing the market share of transit.
- **Efficiency measures** indicate the extent to which cost efficiency is achieved, i.e., costs in relation to benefit; can be used to implement goals towards long-term viability and stability of the service.

The trend analysis is only one aspect of transit performance evaluation. However, when combined with the peer review analysis, the results provide a starting point for understanding the transit system's performance over time when compared to other systems with similar characteristics. In conjunction with the trend analysis, a peer review analysis was conducted to compare various ECAT fixed-route performance characteristics to a group of transit peers. The trend and peer review analyses are organized by the type of measure or indicator and include statistics, figures, and tables to illustrate ECAT's performance over the past five years and how ECAT compares to selected peers.

A similar peer review and trend analysis was conducted for ECAT's complementary paratransit service at a reduced scale. A more detailed analysis for the trend analysis and peer system reviews of ECAT's fixed-route transit service and paratransit service are provided in Appendix B. The final nine peers are presented in Table 3-6 and include two Florida transit agencies and seven out-of-state transit agencies. Two of the peers selected also were included in the previous TDP—Winston-Salem, North Carolina, and Wichita, Kansas. Once the peers were selected, 2014 NTD data were collected for the peer review analyses.

Table 3-6: Selected Peer Systems for ECAT Peer Review Analysis

Agency Name	Location
Winston-Salem Transit Authority – Trans-Aid of Forsyth	Winston-Salem, NC
City of Jackson Transit System	Jackson, MS
Lee County Transit	Fort Myers, FL
StarMetro	Tallahassee, FL
Piedmont Authority for Regional Transportation	Greensboro, NC
Metropolitan Tulsa Transit Authority	Tulsa, OK
Capital Area Transit	Baton Rouge, LA
Corpus Christi Regional Transportation Authority	Corpus Christi, TX
Wichita Transit	Wichita, KS

Selected Performance Measures

Table 3-7 lists the 25 performance measures by category used in the peer and trend analysis. A review of ECAT trends and how ECAT compares to its peers is presented by performance measure type, including General Performance Measures, Efficiency Performance Measures, and Effectiveness Performance Measures. Some performance measures were eliminated from this analysis due to gaps in data.

Table 3-7: Performance Measures by Category

General Performance Indicators	Effectiveness	Efficiency
Service Area Population	Vehicle Miles per Capita	Operating Expense per Capita
Passenger Trips	Passenger Trips per Capita	Operating Expense per Passenger Trip
Passenger Miles	Passenger Trips per Revenue Mile	Operating Expense per Passenger Mile
Vehicle Miles	Passenger Trips per Revenue Hour	Operating Expense per Revenue Mile
Revenue Miles	Revenue Miles Between Failures	Farebox Recovery (%)
Vehicle Hours		Revenue Miles per Vehicle Mile
Route Miles		Revenue Miles per Total Vehicles
Total Operating Expense		Vehicle Miles per Gallon
Total Employee FTEs		Average Fare
Vehicles Available for Maximum Service		
Total Gallons Consumed		

Summary Results of Fixed-Route Trend and Peer Analysis

Trend Analysis Summary

- **Service Supply** – Vehicle miles per capita (service supply) decreased by 1.1% as of 2014, indicating that ECAT services decreased during the analysis period. However, the decrease of service supply resulted in increased ridership productivity, as manifested in service consumption.
- **Service Consumption** – Passenger trips per capita, per revenue mile, and per revenue hour showed an increase over the six-year period. This trend indicates that the ECAT improved in system effectiveness.
- **Quality of Service** – Although the number of system vehicle failures increased over the six-year period, the revenue miles between failures increased. This indicates that the system's service quality experienced a slight improvement during this period.
- **Cost Efficiency** – Operating expense per capita and per revenue mile experienced increased costs; however, operating costs per passenger mile decreased. This indicates that ECAT may be experiencing overall increased costs in operation.

Table 3-8 summarizes the trend analysis of ECAT's existing fixed-route system in terms of the percent that each performance measure changed between 2009 and 2014.

Table 3-8: Summary of ECAT Trends

Indicators/Measures	% Change 2009–2014
General Indicators	
Service Area Population	11.2%
Service Area Size (square miles)	45.6%
Passenger Trips	34.0%
Passenger Miles	70.1%
Vehicle Miles	10.0%
Revenue Miles	9.6%
Vehicle Hours	-2.1%
Route Miles	1.3%
Total Operating Expense	32.0%
Vehicles Available for Maximum Service	20.5%
Total Gallons Consumed	4.7%
Effectiveness Measures	
Service Supply	
Vehicle Miles Per Capita	-1.1%
Service Consumption	
Passenger Trips Per Capita	20.5%
Passenger Trips Per Revenue Mile	22.3%
Passenger Trips Per Revenue Hour	38.1%
Quality of Service	
Number of Vehicle System Failures	4.9%
Revenue Miles Between Failures	4.5%
Efficiency Measures	
Cost Efficiency	
Operating Expense Per Capita	20.3%
Operating Expense Per Passenger Trip	-1.5%
Operating Expense Per Passenger Mile	-22.4%
Operating Expense Per Revenue Mile	20.4%
Operating Ratios	
Farebox Recovery (%) ¹	25.0%
Vehicle Utilization	
Revenue Miles Per Total Vehicles	-9.0%
Energy Utilization	
Vehicle Miles Per Gallon	5.1%
Fare	
Average Fare	24.9%

¹ Farebox recovery data obtained from National Transit Database. The farebox recovery ratio is the fraction of operating expenses which are met by the fares paid by passengers.

Peer System Analysis Summary

The following summarizes the peer review analysis of performance indicators prepared for ECAT.

- **General Performance Measures** – ECAT consistently placed approximately 30% below the peer mean for most general performance measures (passenger trips, passenger miles, vehicle miles, total operating expense). This is consistent with its smaller-than-average service area population and possibly less-dense service area.
- **Effectiveness Measures** – ECAT consistently ranked below the peer mean for all of the effectiveness measures. Vehicle miles per capita for ECAT are approximately 34% below the peer group mean, indicating that the supply of service is less than typically experienced in other similar areas. Passenger trips per revenue mile and passenger trips per revenue hour are below the peer group mean, by 24% and 18%, respectively, indicating that there may be room for improvement for ridership levels. Revenue miles between failures has decreased by only 3%, indicating a consistent quality of service.
- **Efficiency Measures** – The cost efficiency measures provide varying indications of improvements and declines, depending on the measure. For example, ECAT's operating expense per service area capita is 32% above the peer group mean, and its operating expense per passenger trip is 17% below the group mean. The operating expense per revenue mile only 2% below the peer group mean. ECAT's farebox recovery is approximately 20% below the peer group mean; the average fare charged is 50% above the peer group mean. Revenue miles per vehicle mile for ECAT is 5% above the peer group mean, which indicates an average utilization of fixed-route bus vehicles.

Table 3-9 summarizes the peer system analysis prepared for ECAT's fixed-route system and indicates the percent that ECAT is from the peer group mean for each performance measure.

Paratransit Trend and Peer Analysis

A trend and peer review analysis for ECAT's ADA paratransit service was also completed. ECAT's passenger trips, passenger miles, revenue miles, revenue miles, and total operating expense increased overall during the six-year period, particularly after 2013. ECAT experienced improvements in passenger trip per capita and operating expense per revenue hour but declined in performance for passenger trips per revenue mile, passenger trips per revenue hour, number of vehicle system failures, operating expense per passenger trip, and revenue miles per vehicle mile. ECAT consistently ranks between 35% and 60% below its peer systems for the most of the performance indicators, with the exception in number of vehicle system failures, where ECAT places close to the peer mean. A detailed review of the trend and peer system analysis for ECAT's paratransit service is also provided in Appendix B.

Table 3-9: Peer System Analysis

Performance Measure	% from Peer Mean
General Indicators	
Service Area Population	-21.2%
Service Area Size (square miles)	-49.8%
Passenger Trips	-46.8%
Passenger Miles	-25.3%
Vehicle Miles	-28.2%
Revenue Miles	-25.2%
Vehicle Hours	-32.6%
Route Miles	-20.5%
Total Operating Expense	-25.0%
Vehicles Available for Maximum Service	-16.2%
Total Gallons Consumed	-29.9%
Effectiveness Measures	
Service Supply	
Vehicle Miles Per Capita	-33.6%
Service Consumption	
Passenger Trips Per Capita	-54.7%
Passenger Trips Per Revenue Mile	-23.4%
Passenger Trips Per Revenue Hour	-18.2%
Quality of Service	
Number of Vehicle System Failures	
Revenue Miles Between Failures	-3.3%
Efficiency Measures	
Cost Efficiency	
Operating Expense Per Capita	31.7%
Operating Expense Per Passenger Trip	-17.42
Operating Expense Per Passenger Mile	0.90%
Operating Expense Per Revenue Mile	1.64%
Operating Ratios	
Farebox Recovery (%)	-20.1%
Vehicle Utilization	
Revenue Miles Per Total Vehicles	8.9%
Energy Utilization	
Vehicle Miles Per Gallon	-0.8%
Fare	
Average Fare	-50.5%

Section 4: Public Involvement

This section summarizes the public involvement activities planned during the development of the *Connections 2026* TDP. The goal of these public involvement activities was to increase the likelihood of active participation from citizens and stakeholder agencies during the development of the updated plan. Input from the public is critical since the TDP provides a strategic guide for public transportation in the community over the next 10 years.

Current State law effective February 20, 2007, requires that Escambia County document its Public Involvement Plan (PIP) to be used in the TDP development process. Pertinent language from the TDP rule is as follows:

The TDP preparation process shall include opportunities for public involvement as outlined in a TDP public involvement plan, approved by the Department, or the local Transportation Planning Organization's (TPO) Public Involvement Plan, approved by both the Federal Transit Administration and the Federal Highway Administration.

—Florida Rule 14-73.001

Public involvement is an ongoing process that includes continuously receiving and accumulating feedback about transit in Escambia County. One of the first activities in this process was to prepare a PIP to plan out all of the public outreach activities to be undertaken during the development of the *Connections 2026* TDP. The PIP provides numerous opportunities for involvement by the general public and representatives of local agencies and organizations. A copy of the PIP developed for *Connections 2026* is included in Appendix C. Numerous types of public involvement techniques that engaged the community included:

- Branding of the TDP
- Visioning workshop and presentations to the Technical Review Team
- Escambia County Mass Transit Advisory Committee (MTAC), Local Coordinating Board (LCB), and Technical Review Team (TRT) meetings
- Stakeholder interviews
- Discussion group workshops (one for riders and one for non-riders)
- Bus operator discussion group workshop/survey
- Public workshops/open houses
- On-board survey
- Non-rider/public surveys
- Project website, which was continuously updated to provide all information and materials during the development of the *Connections 2026* TDP

These public involvement activities are summarized in Table 4-1, followed by a detailed description of the public involvement activities that took place as a part of *Connections 2026* TDP.

Table 4-1: Public Involvement Participation Summary

Outreach Activity	Participants
Discussion groups	23
Public workshops/grassroots outreach	98
Committees (MTAC, Other)	44
Rider, non-rider, operator surveys	2,207
E-mail blasts	171
Facebook & Twitter	283
Santa Rosa survey	604
Total Participants	3,430

Summary of Completed Public Involvement Activities

Technical Review Team Meetings

A TRT was established to help guide the overall TDP update effort. To meet FDOT requirements, representation from Escambia County, the Florida-Alabama TPO, FDOT District 3, and the local Workforce Development Board (Career Source Escarosa) were invited to participate on the TRT. The TRT also includes representation from neighboring Baldwin County (AL) and UWF.

The TRT held its first meeting on February 22, 2016, at the ECAT offices, with an agenda as follows:

- Objectives of TRT
- Upcoming document deliverables (Technical Memoranda 1 and 2)
- Upcoming public participation activities
- Online public outreach methods, including *Connections 2026* TDP website and use of advanced technologies for on-board and public surveys
- Schedule for completing *Connections 2026* TDP

The meeting format consisted of a discussion on the above topics, with the main purpose to introduce the TDP process to TRT members. Discussion focused on ongoing planning efforts in Escambia County and the region that should be considered as part of the TDP development process.

The second TRT meeting took place on Tuesday, May 31, 2016 at the ECAT offices, with an agenda as follows:

- 10-Year Needs Plan Presentation
 - Document Update
 - Technical Report #1 & #2 – completed; comments received
- Technical Report #3 – submitted; comments due by May 31

- June Public Involvement Activities
 - 2 Public Workshops
 - MTAC Discussion Group Meeting
 - Agency Discussion Group Meeting
- Discussions/Comments
- Wrap-up

The meeting format consisted of a discussion on the above topics, with the main purpose to discuss the findings documented in Technical Reports #1-3 and obtain comments from the TRT on each report.

Local Coordinating Board Meetings

An LCB comprises State agency and community representatives of the TD population to identify local service needs and to provide information, advice, and direction to the CTC responsible for administering the transportation disadvantaged program in each county.

As part of the early outreach efforts for the *Connections 2026* TDP, an introductory presentation was made to the Escambia County and Santa Rosa County LCBs on February 23, 2016.

Discussion at the Escambia County LCB meeting centered on the following:

- Clarification regarding the *Connections 2026* TDP public involvement activities planned for the current week.
- Concern about the lack of interaction between ECAT and LCB members; ECAT recognized that it may not be as interactive as in the past with Board members, which follows several improvements in the service and other positive changes that have been priority and taken time. There was discussion about holding periodic meetings between the ECAT Manager and LCB members to enhance the lines of communication.
- Inquiry about TD rider input in the *Connections 2026* TDP public involvement process. Tindale Oliver reviewed the annual TD survey administered by the Florida-Alabama TPO and found it comprehensive, with plans to use the responses in the TDP development process.
- Future LCB involvement in the TDP development process, noting that a copy of the TDP would be provided following approval by the Escambia County Board of County Commissioners (BCC).

Discussion at the Santa Rosa County LCB meeting centered on the following:

- FDOT's TDP requirements for several areas, although focus was on public involvement and ECAT's governing board being the Escambia BCC. Concern was expressed by LCB members that the urban area of the Florida-Alabama TPO includes a number of Santa Rosa residents who may not be considered with regard to transit.
- Discussion about the transit funding formula, including the population distribution between Santa Rosa, Escambia, and Okaloosa counties and resulting urbanized area funds provided to each.

- Concern that none of the public involvement activities for the Okaloosa County or Escambia County TDPs have planned activities in the Santa Rosa area. ECAT has a growing interest in transit in Santa Rosa County; this presentation was made to the Santa Rosa LCB to begin a level of involvement.
- Request for revision of the online public survey to be made specific for Santa Rosa County, with Santa Rosa County staff providing input.
- Request for input and ideas on the cost to conduct a transit implementation study in Santa Rosa County to objectively evaluate the real need and funding potential for transit. Funding from the Florida-Alabama TPO will be requested to complete this type of study, which would also provide input between TDP update efforts of both counties.

Agency Discussion Group Meeting

During the second phase of public involvement activities, an Agency Discussion Group meeting was held at the ECAT offices on Wednesday, June 1, 2016. Representatives from Pathways for Change, UWF Center on Aging, Independence for the Blind, Lakeview Center on Aging, and the United Way of Escambia County attended the meeting. A summary of completed tasks from the TDP development process was provided, and a presentation on the proposed alternatives was given. This was followed by a discussion on the proposed alternatives. The discussion focused on the proposed plan for expanding existing transit service, adding new transit service, and areas where more transit service improvements are needed. Participants unanimously favored the doubling frequency on selected routes, adding later service, increasing Saturday frequency, and adding Sunday service. The areas and corridors consistently identified as needing more transit improvements 9 Mile Road, N 9th Avenue, N Davis Drive, Navarre, Milton, and Gulf Beach Highway.

Escambia County Mass Transit Advisory Committee Meeting

A meeting of the Escambia County MTAC was held on Thursday June 2, 2016, at the ECAT offices. Compiled data, completed tasks, and proposed transit service alternatives was presented to the participants, followed by a discussion on the proposed transit service alternatives. The most favored expansion of transit service alternatives were doubling the frequency of selected routes and adding later service, followed by increasing Saturday service and better sidewalk connections to bus stops. The most favored new transit service alternatives were the Cantonment Flex, the Pensacola-Milton Limited Express, the Navy Federal Connector, and the Pensacola-Navarre Express. The water ferry was the least favored of the alternatives by the MTAC. Nine Mile Road, Ensley Street, and W Street were the top areas noted as needing transit service. Bus shelters and benches were another common need identified. The need for a trolley to connect the future water ferry and future Amtrak station to the ECAT downtown transfer center was mentioned as a future need. One participant requested a fare subsidy to access the water ferry for lower income employees.

Bus Operator Interviews and Survey

As the primary artery between transit passengers and operations, ECAT bus operators can provide a unique perspective on transit needs and frequent challenges based on their experiences. To gather input, ECAT operators were interviewed and asked to complete a written survey, a copy of which is provided in Appendix C. The following summarizes the key findings from the collective feedback provided by the operators:

- The most frequent complaints operators hear from transit passengers pertain to needing more frequent service and later service in the evenings. Service until 10:00 PM was noted as a need. Other common complaints heard by operators include that buses do not go where passengers want to go and a need for more shelters and benches. All operators agreed that these are valid concerns, particularly regarding a need for later service, as many passengers work later than the bus currently operates and have no other way of getting home.
- Needed service improvements for specific routes include the following:
 - Route 2 needs more service, more time to complete the route, and more frequent buses.
 - Route 41 needs to operate later into the morning before breaking mid-day.
 - Route 45 needs more trips.
 - Routes 47, 50, and 51 need to be expanded in area.
 - Routes 50 and 51 should be interchangeable.
 - Route 58 needs more service, as there are a lot of passengers.
- Better service on weekends and more coverage in Pensacola and 30-minute weekday headways and one-hour headways on Saturday also were noted.
- Drivers expressed that they like working for ECAT because it has a family-oriented atmosphere, nice co-workers, and good benefits.
- The most common compliment that drivers hear relates their friendliness and courtesy.



Non-Rider and Rider Discussion Group Workshops

Rider Discussion Group Workshop

A discussion group workshop was held with six long-term users of the ECAT system on February 24, 2016, at the ECAT offices, with participants identified by ECAT staff and recruited by the Project Team. An introduction to the TDP process and an overview of the discussion group agenda were provided. After introductions of attendees, a discussion guide was used to obtain input from the participants. The following

is a summary of the major themes identified from the input received during this discussion group workshop.

General Input:

- Need to improve existing routes first and then focus on new areas.
- Saturday service has low frequency, so it is very difficult to stay consistent and use transit on the weekends for employment.
- Route 42 has crowding issue during both the AM and PM peak travel periods. This route should be 30 minutes during peak hours. Current piggybacking with the additional bus is not working.
- PACE Center for Girls Escambia-Santa Rosa has its own bus and could use more service.
- Routes 2, 42, and 55 should be one-hour frequency on Saturday.
- Transit needs to connect to both ends of E Nine Mile Road.
- Residents of an apartment complex at Pine Forest Road at I-10 may need transit service.
- A Navy Federal Credit Union is developing quickly and parking already is issue; a transit connection could provide some relief.
- A “Rider’s Day” could be held during which political leaders would ride the bus to increase their awareness of the system and its service levels.
- T & W Flea Market on T Street needs transit service Friday–Sunday only.

Areas of Need:

- New routes needed to connect:
 - Route 43 (UWF/Scenic Heights) to Route 47 (Bellevue/Montclair) via E Nine Mile Road
 - Route 58 (Corry Station/Naval Hospital) to Route 63 (Michigan Avenue/Pensacola International Airport) via N Blue Angel Parkway
 - Route 55 (Pace Boulevard/Warrington) to Route 58 (Corry Station/Naval Hospital) via the Gulf Beach Highway
- Extension of Route 43 (UWF/Scenic Heights) to serve Ellyson Industrial Park east of Davis Highway in the Ferry Pass area.
- Park-and-ride facility on E Nine Mile Road west of Pensacola Boulevard (US 29).
- Transit to serve commercial developments along E Nine Mile Road approaching/around I-10 interchange.
- Transit service along Mobile Highway east of Pine Forest Road (currently served by Route 47) to serve mobile homes and other residential areas in this area and west of Saufley Field.

Non-Rider Discussion Group Workshop

A discussion group workshop consisting of non-riders was held on February 22, 2016, at the ECAT offices. Attendees from the Escambia County MTAC were invited participate in the discussion. Similar to the rider discussion group workshop, an introduction of the TDP process and an overview of the discussion group

agenda were provided. After introductions of attendees, a guide was used to facilitate a discussion on existing and future transit service in Escambia County. The following is a summary of the input received during this discussion group workshop.

Areas of Need:

- Expand coverage area.
- Provide Sunday service.
- Expand service hours to later evening service and weekend/holidays.
- Provide more service geared towards tourists, including a nighttime beach route.
- Expand service to include Ensley area, developing Navy Federal Credit Union, Gulf Breeze, and E Nine Mile Road.
- Provide more awareness and transit promotion; higher marketing budget.
- Shuttle to transport military personnel from airport to bases, currently provided by contract with Good Time Tours.
- Provide more bus stop shelters.
- Provide service for special events such as Gallery Night.
- Conduct better coordination with the rideOn Commuter Assistance Program.
- Assess connectivity with Mobile (AL) to provide service to events.
- Decrease travel time when taking transit.
- Provide more transit service in County Commission District 2 (SW Pensacola/Naval Air Station) and District 3 (W of I-10, including Brent and Ensley).
- Provide transit service in County Commission District 5 (N Escambia County).

Areas of Commendation:

- Riders have mentioned that service has improved.
- Buses are mostly on time, drivers are very nice.
- Bus technologies have improved, with voice automation, GPS, and natural gas-fueled buses.

Other Input:

- Gear service towards service and retail workers with alternative employment schedules, as they currently cannot rely on transit to work on holidays/late evening/some weekend hours.
- Current single fare is fair, but for a family of four the total fare is too high.
- Summer tourists tend to be younger and winter (seasonal residents) are older.
- Large bus bays should be added to accommodate those times that FDOT conducts road maintenance/reconstruction.
- County Commission District 5 pays gas tax but does not benefit from much transit service; they would prefer a flex-type service in this area.
- Sidewalk gaps are stopping people from accessing and riding transit.

Public Workshops

Two public workshops were held during the first and second phases of the public involvement process. The first event was a public workshop held on February 22, 2016, at the Pensacola State College Warrington Campus, and the second was on February 24, 2016, at the West Florida Public Library. The flyer used to advertise the workshops (which was also provided in Spanish) is provided in Appendix C.

For both events, several display boards demonstrating population and employment densities for Escambia County and an overview of existing transit services were provided. A public workshop survey also was distributed. The input received from these surveys was combined with the online survey input and is summarized in the Public (Non-Rider) Survey subsection that follows.



At the rider discussion group and the public workshops, participants were asked to include their thoughts on origins and destinations needed to be served by transit in Escambia County by placing a green dot for origins and a red dot for destinations on a large map of the county. The results of this exercise are illustrated on Map 4-1. From this exercise, there did not appear to be any discernable trends or commonly-noted origins or destinations. Observations from this exercise are summarized below.

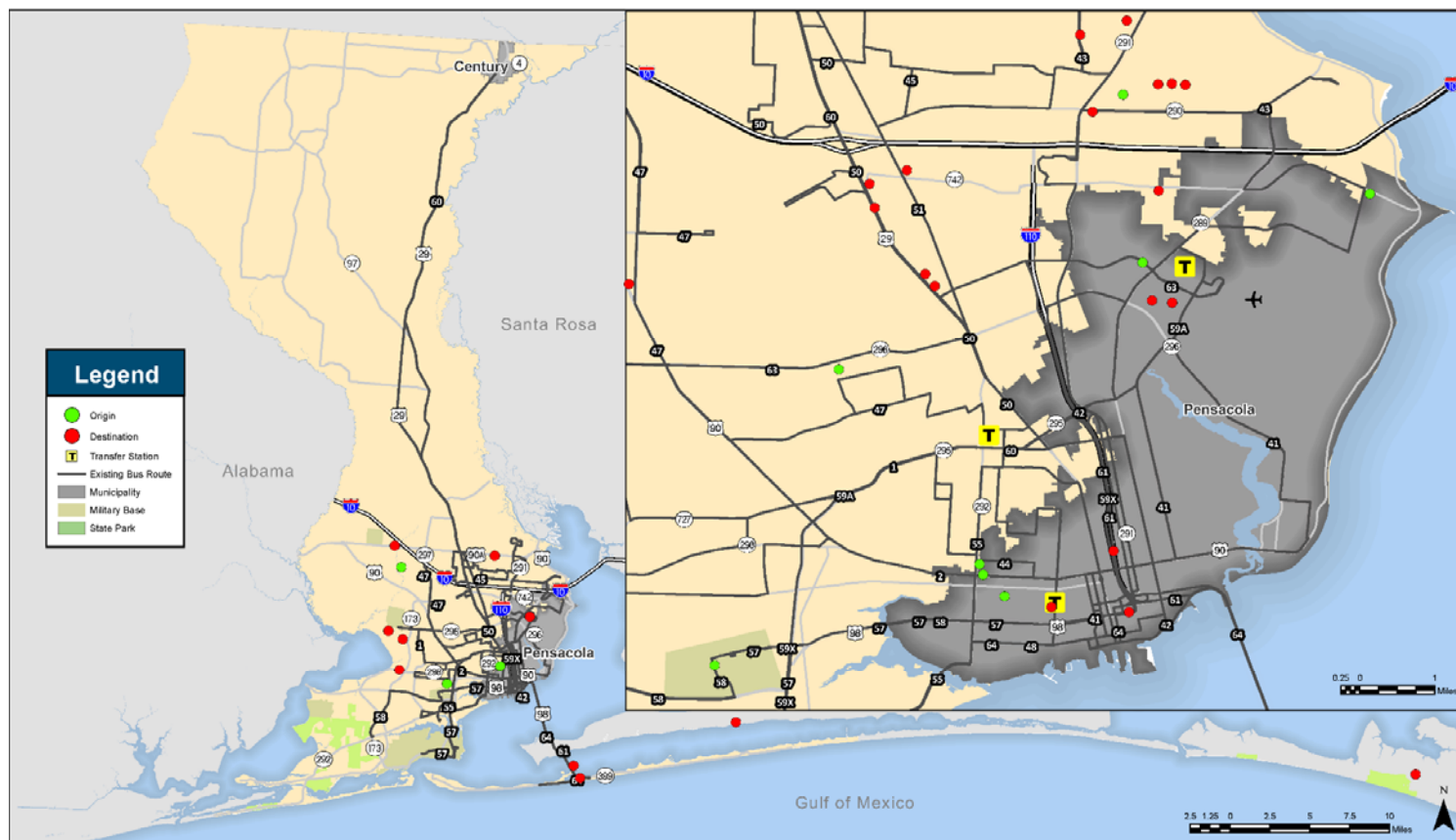
Origins:

- Dispersed residential uses in suburban areas of Pensacola
- Several residential neighborhoods in South Pensacola

Destinations

- Cordova Mall
- Sacred Heart Hospital
- West Florida Hospital
- Pensacola Beach
- Saufley Field
- Industrial area east of Ely Road
- University of West Florida
- Several commercial uses along US 29

Map 4-1: Origin-Destination Exercise Results



Origin-Destination Workshop

The workshops during the second phase of the public involvement process took place on Tuesday, May 31, and Wednesday, June 1, 2016, at the West Florida Genealogy Library and West Florida Public Library, respectively. At these workshops, participants were asked to comment on the proposed transit alternatives and identify any additional areas of need. N 9th Avenue, Gulf Beach Highway, and Naval Air Station were the top three areas and corridors identified as needing more transit service improvements. Most respondents voted favorably for all of the service expansions proposed, such as doubling frequency on selected routes, adding later service, increasing Saturday frequency, adding Sunday service, and adding more bus amenities. Most responded “neutral” to extension of Route 47. The Pensacola-Milton Express was the most favored of proposed express routes. The Pensacola-Orange Beach Limited Express was the second most favored. Notable comments include a need for better transfer times, prioritizing bus shelters to locations that need them, needing transit service to accommodate for other types of trips like recreation, road diets, and connecting the campuses of the universities with more than one campus. The Navy Hospital, Navy Museum, and Corry Shopping Center were noted as places needing more effective transit for veterans. Gulf Beach and Century were also noted as areas needing new transit service.

Grassroots Outreach Events

In addition to public workshops, Project Team members attended “grassroots” community events to reach out and gather input from both riders and non-riders. The following community events were attended by the Project Team, where information about the *Connections 2026* TDP process was made available and input was sought in the form of surveys and general comments:

- Palafox Market on Saturday, March 12, and Saturday, March 19, 2016
- Gallery Night – Friday, March 18, 2016
- Pensacola State College on Tuesday, March 8, 2016



Participant at grassroots community meeting filling out public survey (left) and attendees at Gallery night (right)

Stakeholder Interviews

Stakeholder interviews provide a one-on-one forum to gather input from policy and agency or community leaders concerning the vision for public transportation in their community. Interviews were conducted in March and April, 2016 with the following stakeholders:

- Dr. Kevin Bailey, Vice President, University of West Florida
- Charles Bare, Pensacola City Councilman
- Steven Barry, Escambia County Commissioner
- Tom Gilliam, Vice President, Pensacola State College
- Steve Hayes, President, Visit Pensacola
- Adriana Lewis, CMDCM, Naval Air Station Pensacola
- John Peacock, President, Downtown Improvement Board
- Wilson Robertson, Escambia County Commissioner
- Grover Robinson, Escambia County Commissioner
- Rob Williamson, Santa Rosa County Commissioner

A list of 18 questions was developed for the interviews, and each stakeholder was asked the same questions. The input received during these interviews was reviewed and major themes identified as summarized below:

- **Perception of Transit** – The existing transit service does a reasonable job of meeting the needs of those in the community who, by necessity, must use it. It is not perceived as reducing congestion or providing an alternate means of transportation to people to the general public.
- **Future Role of Transit** – There is a need to provide more options to those who need it, including lower socio-economic groups and those seeking to further their economic growth through training and educational opportunities. There also is a need to include Naval Air Station Pensacola and Navy Federal Credit Union when determining future needs and growth of system.
- **Transition to a More Multimodal System** – A good system includes safe access for all modes of transportation, including bicycle, walking, and mass transit.
- **Economic Development** – Access to transportation for employment is a basic component of economic development. The County needs to consider how to provide cost-effective transportation to large employers, particularly those with limited parking. Effective public transit should be a given in a well-functioning economy.
- **Areas with High Traffic Congestion** – Davis Highway, University Parkway, Scenic Highway, US 29, Palafox Street, and the Downtown area were noted as areas of high traffic congestion during certain times. Traffic congestion is being handled in many areas and is a problem only during specific hours.
- **Important Passenger Amenities** – Safe shelters and benches were noted.

- **Potential Rider Markets** – Employees, students, and residents seeking quality-of-life essentials were noted. Tourists and military personnel also were mentioned frequently as markets that effectively could be pursued.
- **Funding** – Current funding by gas taxes is effective and fair. The use of general fund tax dollars or a transit-specific tax was not optimal. A dedicated funding source is needed.
- **Innovative Strategies to Consider** – Consideration should be given to an easier fee structure, smaller buses in some areas, and rail service along the US 98 corridor.
- **Level of Public Support for Transit** – Mixed views were provided, but, in general, transit is necessary, but there is not much public support for it among non-users.
- **Community Goals** – Better economic opportunities, workforce development, safety, quality of life, and a renaissance for the Downtown area were noted as community goals that are best served by transit.

Public (Non-Rider) Survey

A survey aimed at the general public, including persons who currently do not use the ECAT system, was administered via the project website and at public workshops to gather information on the public's perceptions on transit issues and needs in Escambia County. In total, 17 questions were used to determine willingness to use public transit and the community's transit needs, gauge public awareness of transit issues in Escambia County, and gather socio-demographic information of survey respondents. An additional question allowed participants to provide comments. The survey, administered in both English and Spanish, resulted in 304 surveys completed between February 24 and April 8, 2016; all surveys were completed in English. A copy of the survey instrument is provided in Appendix C.



Summary of Public (Non-Rider) Survey Results

Most survey respondents felt that awareness of public transportation services in Escambia County is good, with 75% believing that there is moderate-to-high awareness of public transportation in the community (Figure 4-1). However, when asked what they thought about ECAT's transit service, more than half (57%) indicated that it must be provided or might be useful (Figure 4-2).

Figure 4-1: How much awareness is there in the community about transit/public transportation?

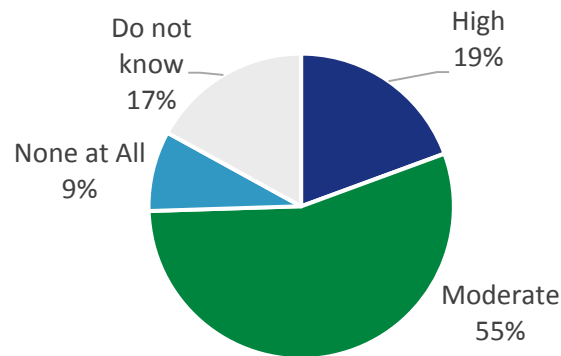
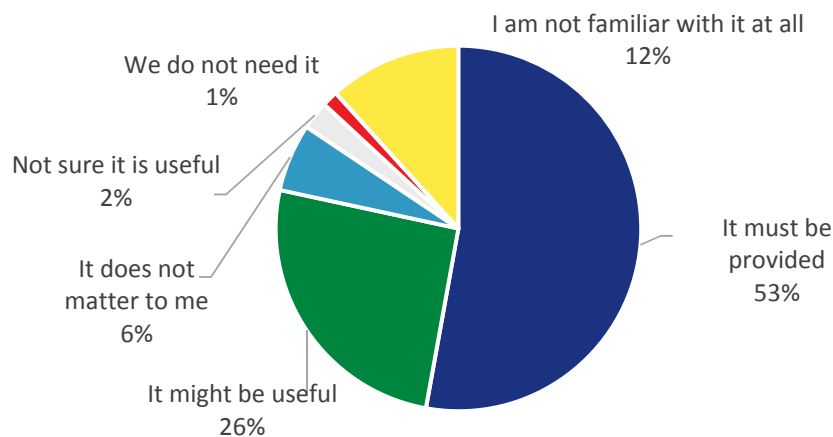


Figure 4-2: What do you think of ECAT transit service?



A majority of respondents (65%) agreed that congestion was a problem in Escambia County (Figure 4-3). Of those who indicated traffic congestion was an issue, 71% indicated that transit would relieve or may provide some help in relieving congestion, and 11% indicated that transit would either create additional traffic issues or make congestion worse (Figure 4-4).

Figure 4-3: Is traffic congestion a problem in Escambia County?

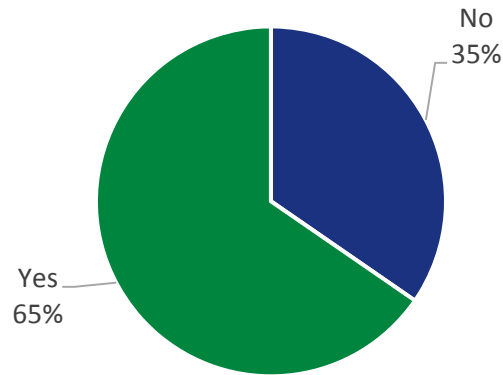
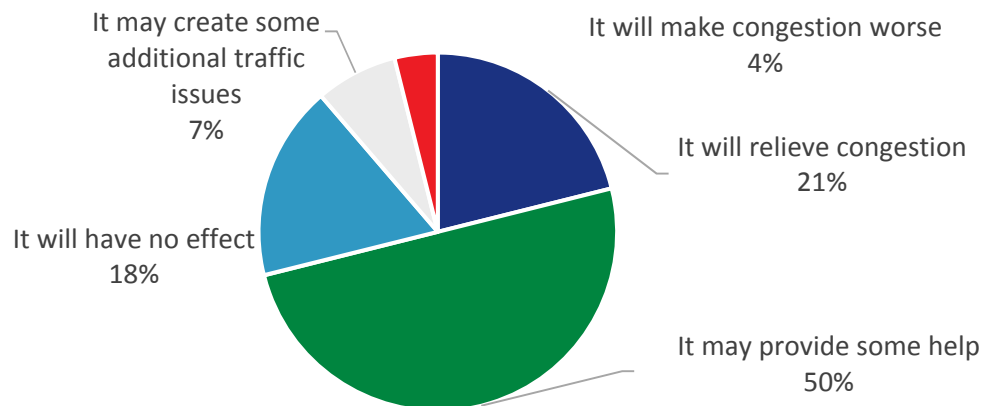


Figure 4-4: What role do you see transit playing in alleviating traffic congestion?



Although just over two-thirds of participants have not used ECAT's transit services (Figure 4-5), the majority (69%) believed that there was a need for additional transit service throughout the county (Figure 4-6). Allowing better commuting options/accessibility to employment, providing a more dependable source of transportation, and being better for the environment were the top three benefits that participants believed would result from additional transit service in Escambia County (Figure 4-7).

Figure 4-5: Have you used ECAT transit service?

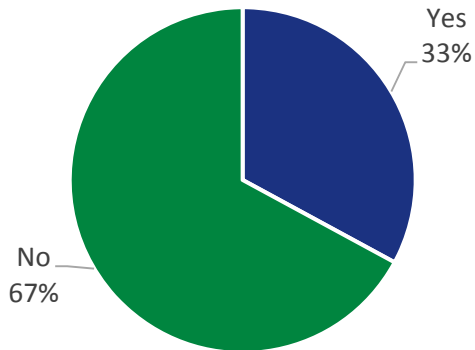


Figure 4-6: Do you think there is a need for additional transit service in Escambia County?

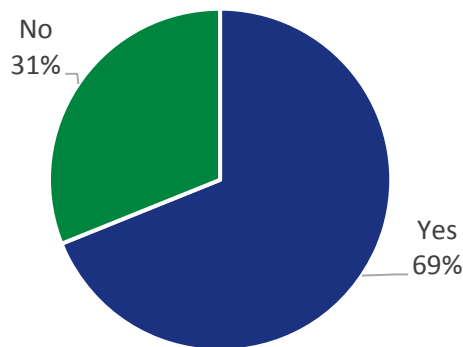
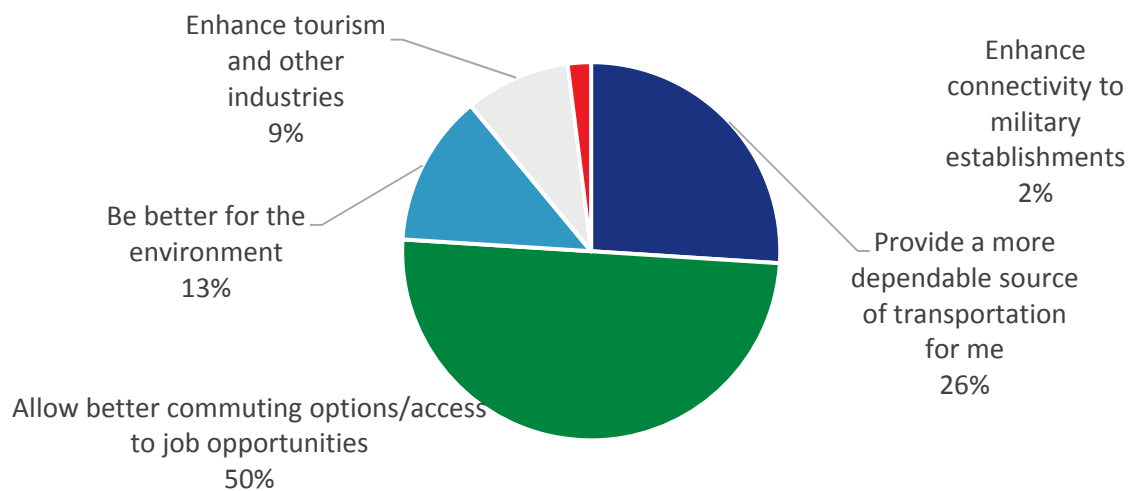


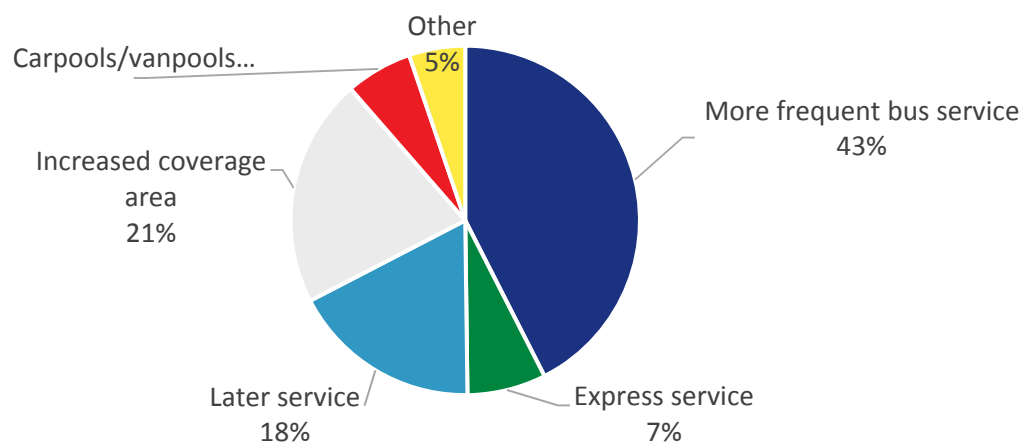
Figure 4-7: What benefits of transit do you believe could occur as a result of additional service?



When asked which services should be added to the transit network, 43% of respondents chose more frequent service, followed by increased coverage area (21%), and later service (18%) (Figure 4-8). Noted areas in which additional service is needed—either more coverage or express service—and additional comments related to service include:

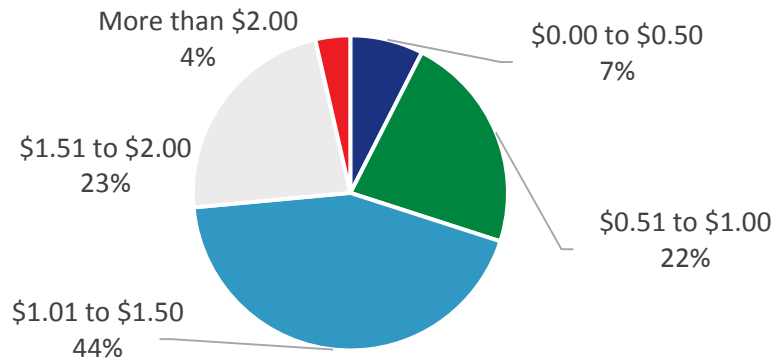
- Provide service to Perdido Key and Santa Rosa County, Downtown to Uptown, West Pensacola, North Escambia County, Milton, Pace, Pea Ridge, Navy Federal Credit Union, all urban areas—more neighborhoods, Ensley and Cantonment in general, University of West Florida, Pensacola State College, beaches/tourist areas.
- Revise routes to include transfer points at major cross-intersections.
- Develop a UWF–ECAT partnership to provide UWF students access to campus (if they live off campus) and also to downtown, beach, etc.
- Provide Sunday service, more frequent Saturday service, later evening service.
- Have fewer service downtimes in service.

Figure 4-8: What type of additional transit service you would most like to see?



Survey respondent's opinions varied regarding the reasonable amount for a one-way fare for transit. As shown in Figure 4-9, the majority (44%) thought that a one-way fare of \$1.01–\$1.50 was reasonable. Another 22% said \$0.51–\$1.00 was reasonable, and 23% said \$1.51–\$2.00 was reasonable. Only 4% indicated that a fare of \$2.00 or more was reasonable, and 7% indicated a fare of less than \$0.50 was a reasonable one-way fare.

Figure 4-9: What do you think is a reasonable one-way fare to pay for transit service?



There was varied support for financing transit through local taxes (Figure 4-10). Approximately 34% of respondents believed that the community was somewhat willing to pay for transit services, 18% believed there was definitely community support, and 19% believed there was no community support at all; 29% of respondents were not sure.

Related to respondent willingness to finance public transit through additional local taxes, the level of support decreased some (Figure 4-11). Approximately 32% of respondents were somewhat willing to pay additional taxes to fund transit, and 17% were definitely willing; however, 30% of respondents indicated they were not willing at all to fund transit service through additional local taxes. The remaining 21% were unsure of their level of support to fund public transit through local taxes.

Figure 4-10: Do you believe there is a willingness in the community to consider additional local funding for transit?

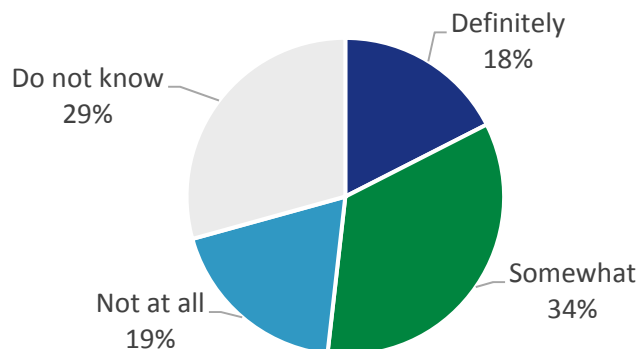
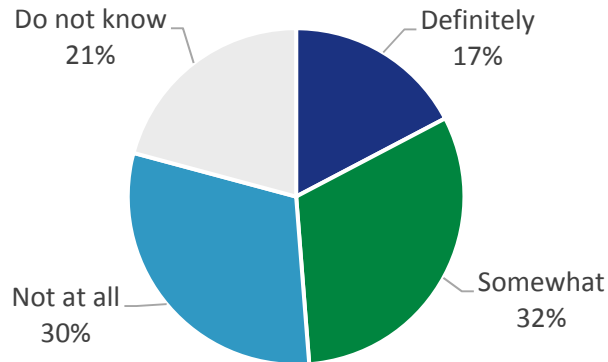


Figure 4-11: Are you willing to pay additional local taxes for an expanded transit system?



Socio-demographic information of participants is shown in Figure 4-12 through Figure 4-15. As shown in Figure 4-12, the top five most frequently-cited home ZIP codes include the Pensacola (32514, 32504, 32505, and 32506) and Cantonment (32522) areas. As shown in Figure 4-13, the most frequently-cited work ZIP code is in Pensacola (32504). Approximately 10% of respondents indicated they did not work, were a student, or were retired and are included under “Other.”

Figure 4-12: What is your home ZIP code?

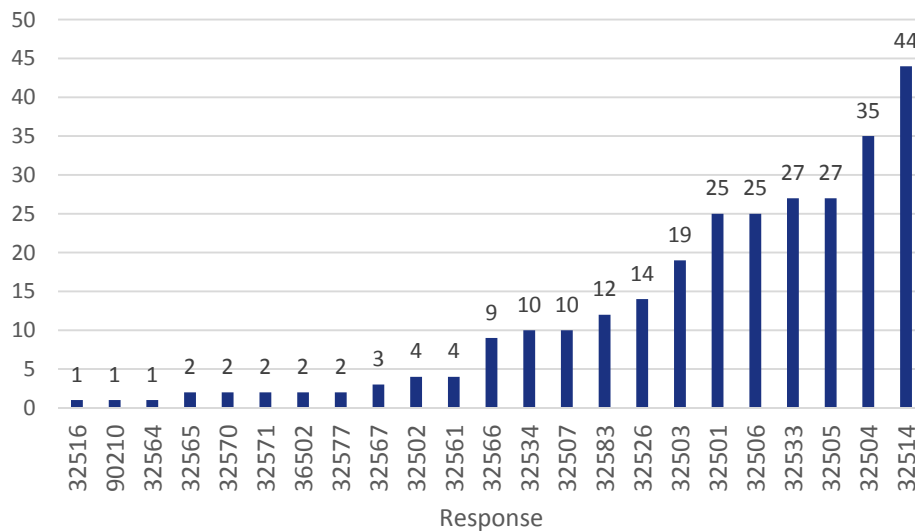
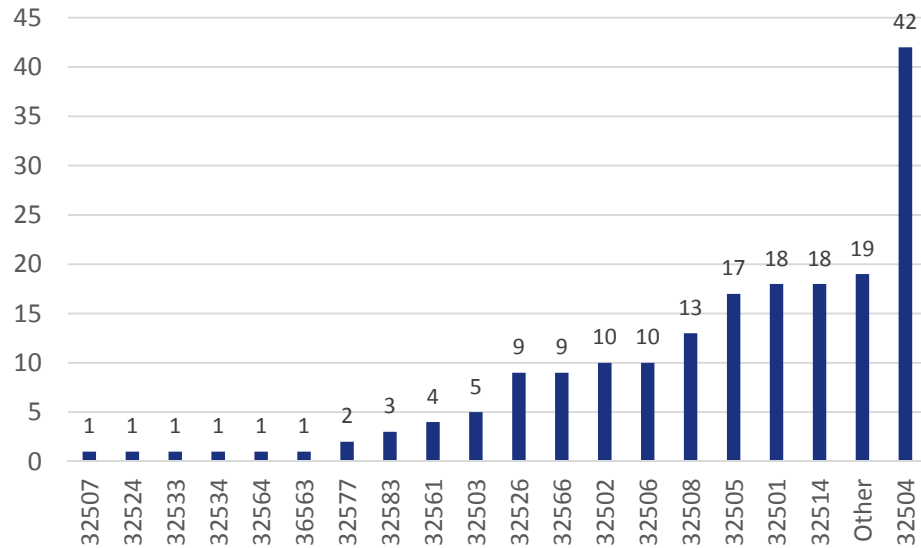
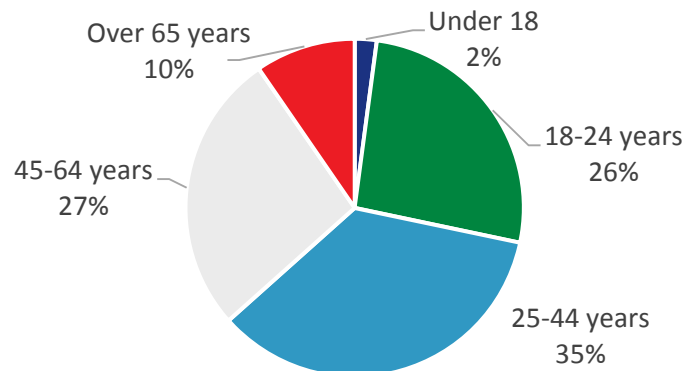


Figure 4-13: What is your work ZIP code?



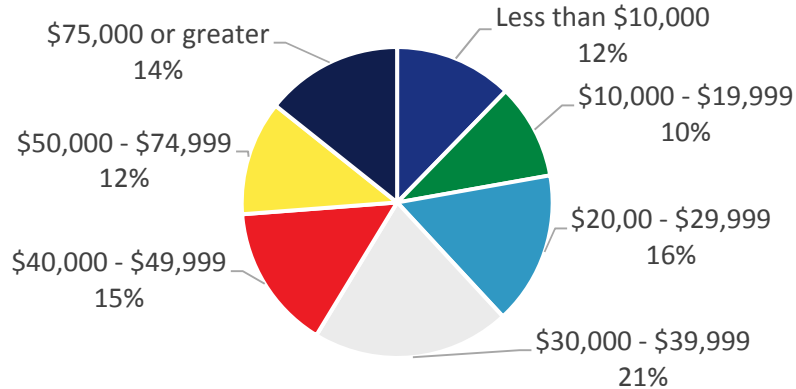
As shown in Figure 4-14, there was a good mix of age of survey respondents. The most frequent (35%) was ages 25–44, with 27% of respondents ages 45–64 and 26% ages 18–24. Approximately 10% of respondents were age 65 and older.

Figure 4-14: What is your age?



The distribution of respondent total household annual income was fairly even (Figure 4-15). The most frequently-cited annual income category was \$30,000–\$39,999 (21%), and the least frequently-cited annual income category was \$10,000–\$19,999 (10%).

Figure 4-15: What is the range of your total household income for 2015?



Participants were asked to rank which aspects of transit are most important to them. Based on the percentage of responses summarized in Table 4-2, days and hours of service, safety/security on the bus and at bus stops, and frequency were within the top five responses receiving the highest percentage of those who responded “very important.” The lowest percent of respondents noted that accessibility of bus passes (54.7%) and cost of riding the bus (52.7%) were “very important.”

Table 4-2: Ranking of Transit Characteristics

Transit Service Option	Very Important	Somewhat Important	Neutral	Not Very Important	Not Important at All
Days of service	88.8%	8.6%	1.8%	0.0%	0.7%
Hours of service	87.9%	7.4%	3.9%	0.4%	0.4%
Safety/security on bus	86.9%	9.6%	3.2%	0.0%	0.4%
Safety/security at bus stops	83.2%	12.9%	3.6%	0.0%	0.4%
Frequency	82.6%	13.5%	3.2%	0.0%	0.7%
Convenience of routes	82.6%	12.1%	4.6%	0.4%	0.4%
Vehicle cleanliness and comfort	77.9%	16.4%	5.4%	0.0%	0.4%
Dependability of buses	77.1%	18.2%	3.9%	0.4%	0.4%
Bus driver courtesy	69.8%	17.8%	11.4%	0.4%	0.7%
Availability of bus route information	68.2%	23.2%	7.9%	0.4%	0.4%
Bus stop cleanliness and comfort	65.6%	22.2%	11.5%	0.4%	0.4%
Travel time on bus	63.1%	23.0%	12.1%	0.7%	1.1%
Location of bus stops	61.2%	27.0%	7.9%	3.6%	0.4%
User-friendliness of bus information	60.7%	25.4%	13.2%	0.4%	0.4%
Accessibility of bus passes	54.7%	26.3%	17.3%	0.7%	1.1%
Cost of riding bus	52.7%	24.7%	19.4%	2.9%	0.4%

Following the questions, survey respondents were asked to provide other comments or input related to ECAT services for consideration in the development of the *Connections 2026* TDP. The following is a summary of the major categories/themes of comments received:

- **Service** – Need a more convenient schedule for alternative employment schedules, including later service and expanded weekend service (shorter headways on Saturdays and add Sunday service). Service needs to be convenient and reliable. Existing service is great, but there need to be more routes and increased frequency for transit to be practical for most people.
- **Funding** – Concern expressed about using local/State funds to pay for transit service; fares paid by those using transit should fund the system.
- **UWF Trolley** – Service at UWF should run both ways; running only one way takes too long to be feasible for most people.
- **Ease of access to transit information** – Difficult to access transit schedules and other information; online information not specific enough, confusing about how to get passes and times to be at stops. Bus drivers should be patient when explaining information to passengers.
- **Service for transportation-dependent persons** – The number of older adults is increasing and they need transit service to get to medical appointments and grocery shop as they can no longer drive themselves. People without a car or who have disabilities also must rely on transit service, which does not run very late in the evening or frequently on Saturdays and no service on Sundays.
- **Geographic challenges** – Suburban, lower-density development outside of beach areas/Pensacola core make transit efficiency difficult.

On-Board Survey

This section discusses the on-board survey that was conducted in February 2016 to collect socio-demographic information and travel behavior of ECAT passengers. The method used for surveying bus riders was distribution of a self-administered, 22-question survey instrument to all passengers aboard ECAT bus routes. The surveys were distributed on approximately 40% of ECAT bus runs for both weekdays and Saturdays and distributed over four full weekdays (Tuesday through Friday) and Saturday. Riders on all ECAT routes received identical surveys. The standard survey instrument was translated into Spanish for Spanish-speaking passengers who were not able to complete the English version. A copy of the survey instrument is provided in Appendix C. Table 4-3 summarizes the number of on-board surveys completed by route; as shown, 1,341 surveys were completed.

Table 4-3: Summary of On-Board Survey Responses by Route

Route	Number of Completed Surveys
1	22
2	131
41	25
42	164
43	60
44	38
45	138
47	61
48	43
50	70
51	65
55	86
57	49
58	31
59a	4
59X	74
60	7
61	11
63	34
Beach Jumper	31
Express Shuttle	57
UWF Trolley	140
Total	1,341

The on-board survey was distributed by a team of trained survey personnel who completed an orientation session prior to the survey to instruct them on duties and responsibilities and to discuss possible issues or concerns they might have while conducting the survey.

Survey Characteristics

The survey consisted of questions to identify passenger travel characteristics, rider socio-demographics, and customer service satisfaction.

Passenger travel characteristics and behaviors were identified by questions that included:

- Common reasons for riding the bus
- Usual method for reaching the bus
- If a wheelchair was used to board the bus
- List of bus routes used when taking a one-way trip
- Number of one-way bus trips typically made per week
- Most important reason for riding the bus
- Frequency using ECAT services

- Fare type used
- Access to other modes of transportation

Socio-demographic information was identified by questions that included:

- Possession of driver's license
- Household vehicle availability
- Age
- Race
- Ethnic origin
- Primary language
- Household income
- ZIP code of primary residence

Customer service information was identified by questions that included:

- Preference for receiving information about ECAT services
- Bus service experience
- Recommendations for service improvements
- Satisfaction with overall ECAT bus service

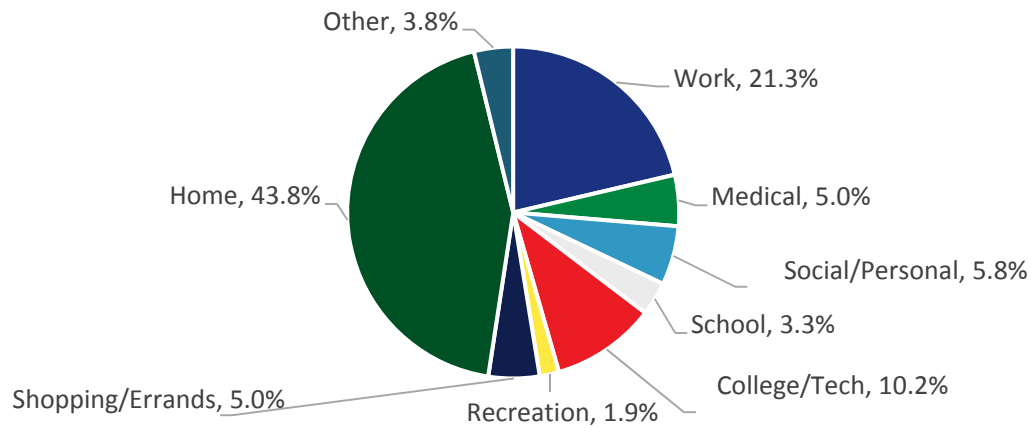


Passenger Travel Characteristics and Behaviors

This section identifies characteristics of passenger travel habits, trip origin and destination, and history of using ECAT bus services.

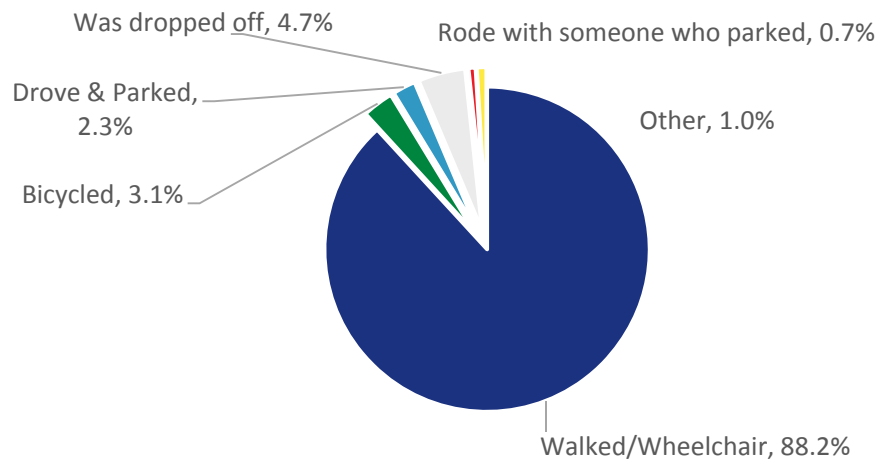
Passengers were asked to indicate the type of place had just come from prior to starting their trip on the bus (Figure 4-16). A total of 44% responded that they had come from home, 21% came from work, and 10% came from college/technical school.

Figure 4-16: What type of place are you coming from now?



Passengers were asked what mode of transportation they used get to the bus stop (Figure 4-17). The majority (88%) indicated that they walked or used a wheelchair to reach the bus stop, nearly 5% were dropped off, 3% used a bicycle to get to the bus stop, and 2% drove and parked. Less than 1% rode with someone or used another mode to reach the bus stop.

Figure 4-17: How did you get to the first bus stop for this one-way trip?



Passengers were asked to list the order of bus routes they used to make the one-way trip the day the survey was taken. Data collected for this question were used to determine the number of transfers used by ECAT bus riders and to identify the most frequent route transfer combinations.

To conduct a transfer analysis, a series of data cleaning and quality control steps were performed to obtain a clean data set to examine the number of transfers occurring between routes and to assess transfer combinations for persons using three or more buses to complete their one-way trip. The data cleaning and editing process included three major steps:

- Extract records that indicate more than one bus route will be used to complete trip.
- Eliminate duplicate bus routes indicated by respondents as part of the bus route listing.
- Sum the total number of bus routes used for all records in the database.

Initial results indicated that 557 persons transferred buses to complete their one-way trip. Based on the total number of valid responses (801) for Question 4, 69.5% of respondents indicated that they would need to use two or more buses to complete their trip. Table 4-4 shows the total number of respondents who indicated needing to make no, one, two, or three transfers to complete their trip.

Table 4-4: Summary of Transfer Activity

Number of Transfers	Number of Records	Percent
No transfer	244	30.5%
One transfer	415	51.8%
Two transfers	112	14.0%
Three transfers	30	3.7%
Total	801	100%

Single transfer records were extracted from the database to create a transfer activity matrix. The use of matrices was employed for the transfer analysis because a matrix serves as a user-friendly format for viewing and assessing one-to-one relationships. This is useful in relating bus transfer activity in that a matrix facilitates the review of transfers occurring between all bus routes. As shown in Table 4-5, three routes experience the highest one-transfer activity—Routes 42, 45, and 55.

Table 4-5: Summary of Single Transfer Activity

From/To	1	2	41	42	43	44	45	47	48	50	51	55	57	58	59X	60	61	63	64	Total
1		1		6			3		6		2	2	1							21
2	5		3	12	2	2	14	1	9	1	9	6	1	1		2	1		2	71
41					1	1								3						5
42	4	5	2		5	9	6	1	3	1	1	7		1		1				46
43			3	2			9				1							1		16
44		1	1	8	1		5	1	1	2	2		1	3			1			27
45	2	7	2	7	9	2	3	4	1		3	1	2	2						45
47		3	1	11			4		2	4		3	1							29
48	2	4		1		1	1	2		1		1	3				2			18
50		4		3		2	5				2	6					1	4		27
51	1	1		3		1	6	1	2	3		2					2	1		23
55	1	5		14		2	6	2		7	3		2				3			45
57		1		4			3		1	1				4	1				2	17
58	1	1	2	6		1	2		1		1		1							16
60	1			1								1								3
63	1			3				1			1									6
Total	18	33	14	81	18	21	67	13	26	20	25	29	12	14	1	3	10	6	4	415

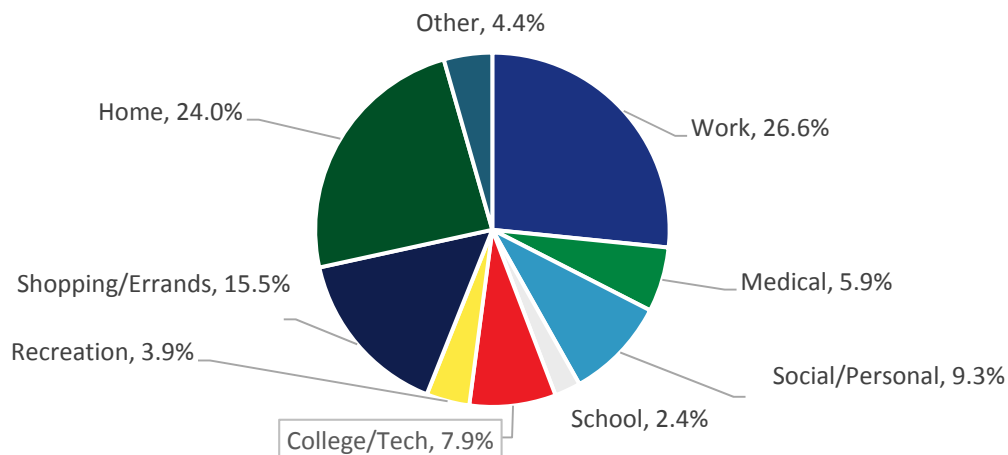
In addition to assessing the volume of single transfer activity between bus routes, a multiple transfer activity analysis was performed for those records that indicated three buses to complete an individual one-way trip. Table 4-6 presents the most frequent transfer combinations for respondents making two transfers.

Table 4-6: Summary of Two-Transfer Activity

Transfer Combination	Count
47-42-45	5
55-42-43	5
45-1-2	3
2-44-45	3

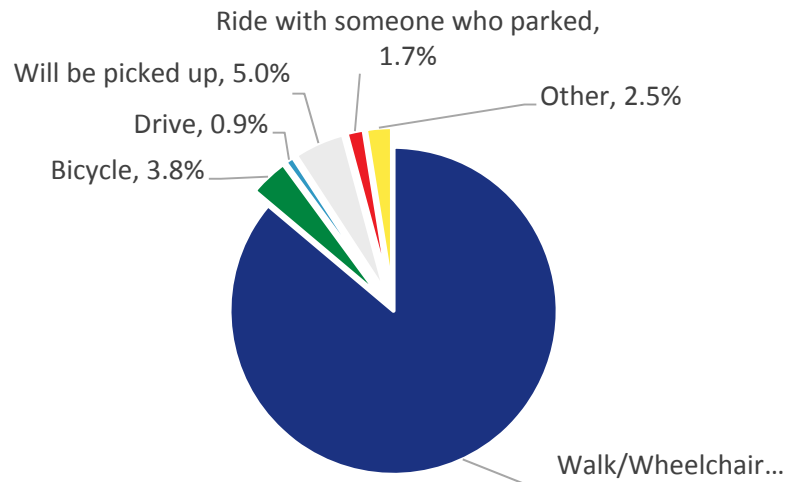
Passengers were asked to indicate the type of place they would be going to after riding the bus (Figure 4-18). The majority indicated they were either going to work (27%) or shopping (errands) (16%), indicating that most outbound trips are either home-work or home-shopping/errand-related trips. Another 24% of respondents were heading home.

Figure 4-18: What type of place are you going to now?



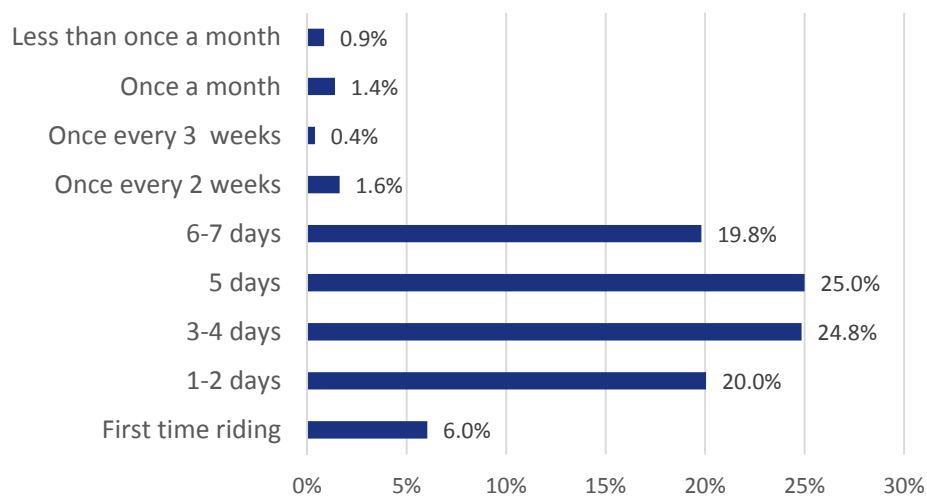
Passengers also were asked what mode of transportation they would use to reach their final destination after taking the bus (Figure 4-19). The responses closely mirror the mode of transportation used to reach the first bus stop of the trip, as the majority (86%) indicated they would walk or use a wheelchair; 5% would be picked up, and nearly 4% would use their bicycles. Less than 1% indicated they would use a car to complete their trip.

Figure 4-19: After you get off the last bus of this trip, how will you get to your final destination?



Respondents were asked how many one-way trips they made per week using ECAT buses (Figure 4-20). Most indicated that they used the bus on a regular basis, with 50% riding the bus 3–5 days per week, 20% riding 1-2 or 6–7 days per week. Only 5% of passengers indicated that they ride ECAT sporadically, and 6% indicated that this was their first time riding ECAT.

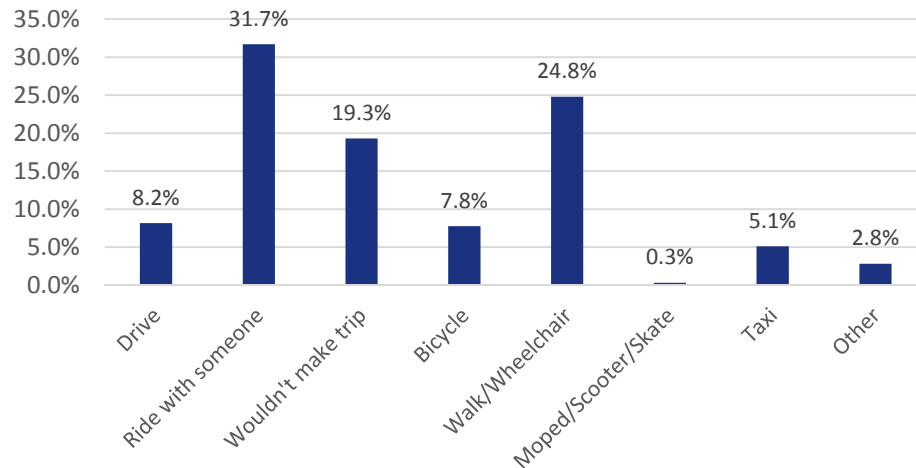
Figure 4-20: How many days per week do you ride the bus?



Respondents were asked how they would make their one-way trip if not by bus (Figure 4-21). The most frequent response was to ride with someone (32%) or walk/wheelchair (25%); 19% of passengers indicated they would not make the trip if the bus was not available; and only 8% indicated they would drive as an

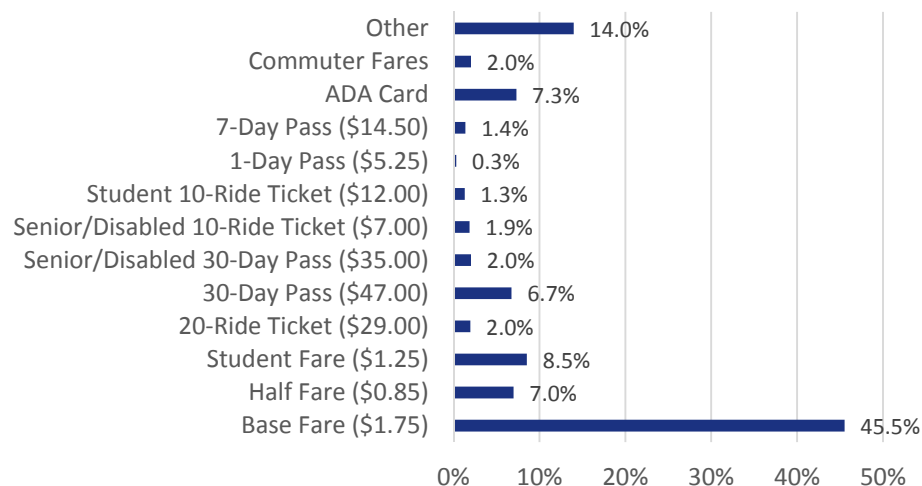
alternative, which is consistent with passengers responding to that lack of vehicle/license availability as a primary reason for using the bus (see Figure 4-23).

Figure 4-21: How would you make this trip if not by bus service?



Passengers were asked which type of fare they paid when they boarded the bus for this one-way trip (Figure 4-22). Most (46%) paid the regular cash-fare; 4% indicated the “other” fare category, which includes free bus fare for military personnel; 9% paid the student fare; and 7% paid using a 30-day pass, half fare, or ADA card.

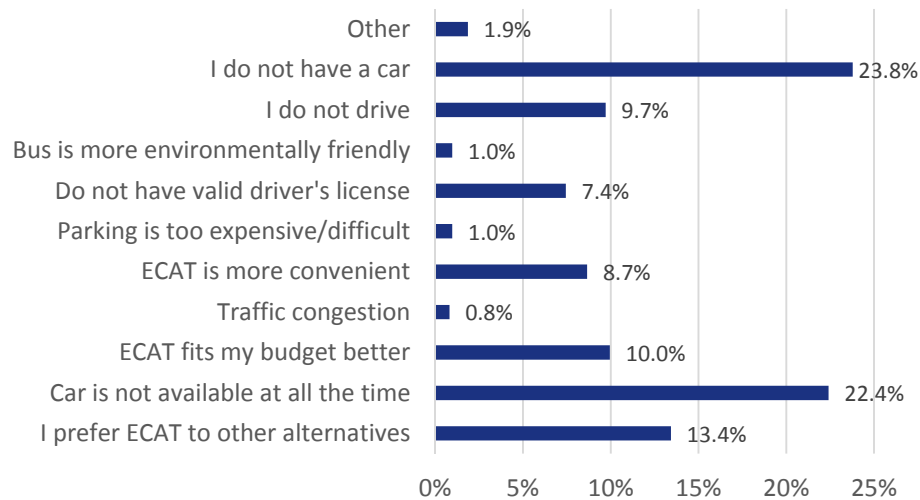
Figure 4-22: What type of fare did you pay when you boarded the bus?



Passengers were asked to indicate their most important reason for riding the bus (Figure 4-23). The majority of responses were vehicle-related; the primary reason was no access to a car (46% combined),

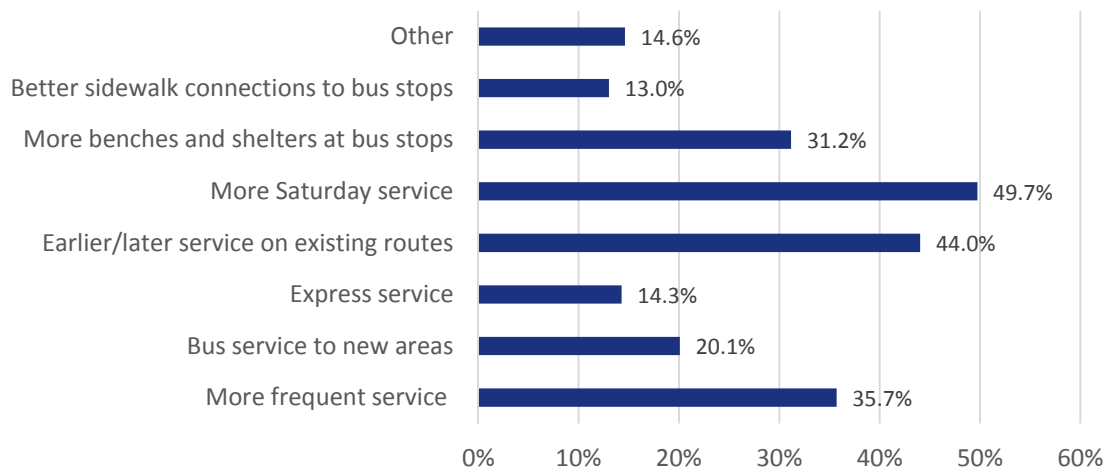
followed by do not drive/do not have a driver's license (17% combined). In total, 32% of passengers indicated that the bus was a more preferred/convenient/economical way to travel.

Figure 4-23: What is the most important reason you ride the bus?



Passengers were asked to identify the three service improvements that would improve their experience using ECAT (Figure 4-24). The most frequently-cited responses included more Saturday service (50%), earlier/later service on existing routes (44%), and more frequent service (35%).

Figure 4-24: Which three service improvements would make ECAT better for you to use?



Passenger Socio-Demographic Information

This section identifies socio-demographic characteristics of passengers that use ECAT services, including ethnicity, household income, ZIP code of primary residence, and possession of a driver's license. These types of questions enable ECAT to construct a profile of the typical passenger.

As technology changes, it is important to understand what methods customers prefer to obtain information about ECAT's service. According to this on-board survey and summarized in Figure 4-25, receiving information about transit through ECAT's website/email is the preferred method (42% combined), followed by at the bus stop (28%) and on the bus (26%).

Figure 4-25: How do you prefer to receive information about ECAT?

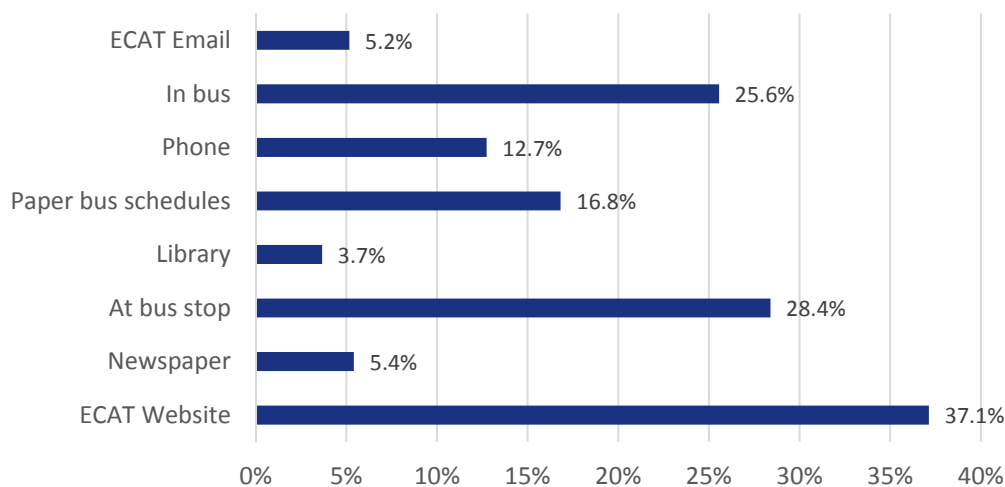


Figure 4-26 provides a socio-demographic profile of the typical ECAT rider based on questions about gender, annual household income, age, race/ethnicity, and primary language spoken. Findings from these questions include the following:

- A slightly higher percent of riders were male (55% vs. 45% female).
- The majority (78%) had an annual household income of less than \$20,000 or did not work.
- The age of ECAT riders was varied, although trending towards younger riders. The majority (32%) were ages 18–24, 22% were 25–34, 15% were 35–44, 13% were 45–54 or 55–64, and the remaining 5% were 65 or older.
- The majority of passengers (95%) spoke English and identified as Black/African-American (52%), White (Caucasian) (38%), and not of Hispanic or Latino ethnicity (92%).

The passenger responses illustrated in Figure 4-27 and Figure 4-28 further confirm a primary use of ECAT by passengers who do not have access to a vehicle or who are unable to drive, as 65% of respondents

indicated that they had zero working vehicles at their home and 63% indicated there was only one licensed driver in their household.

Figure 4-26: ECAT Rider Socio-Economic Profile

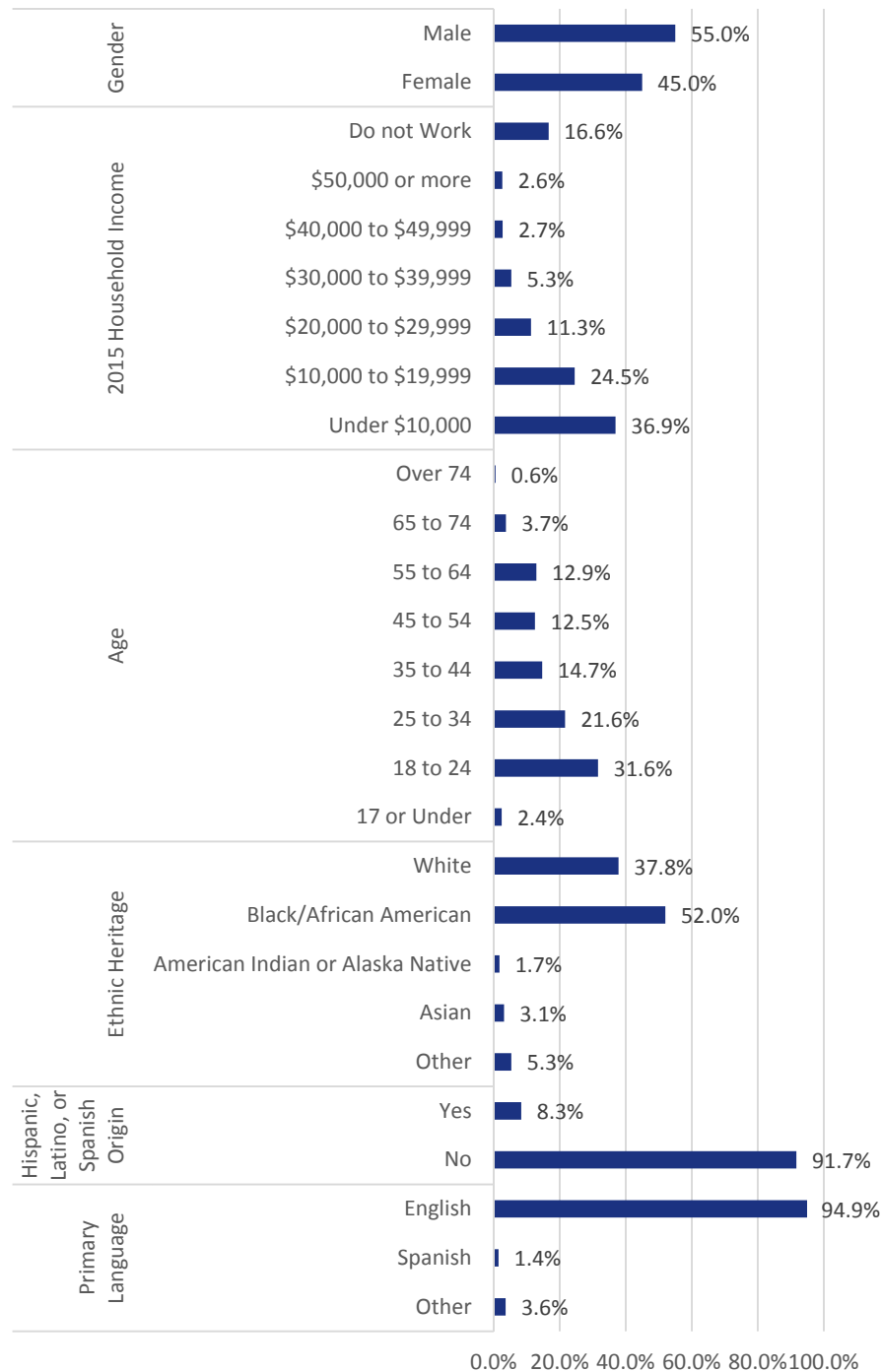


Figure 4-27: How many working vehicles are at your home?

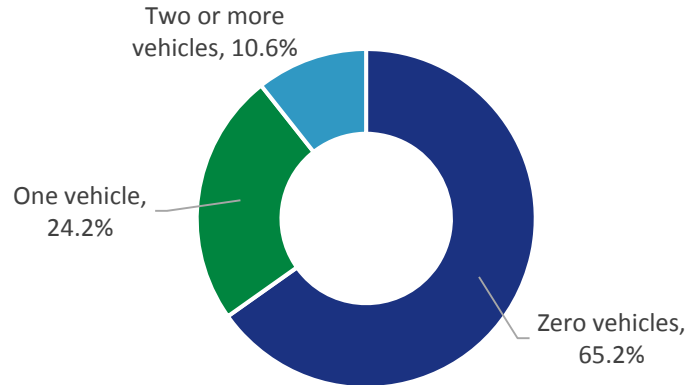
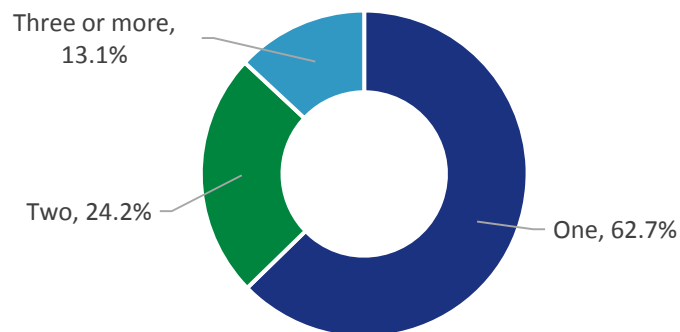


Figure 4-28: Number of licensed drivers in household?



Passengers were also asked to provide their home ZIP code. The top 10 ZIP codes are noted in Table 4-7.

Table 4-7: Top 10 Home ZIP Codes

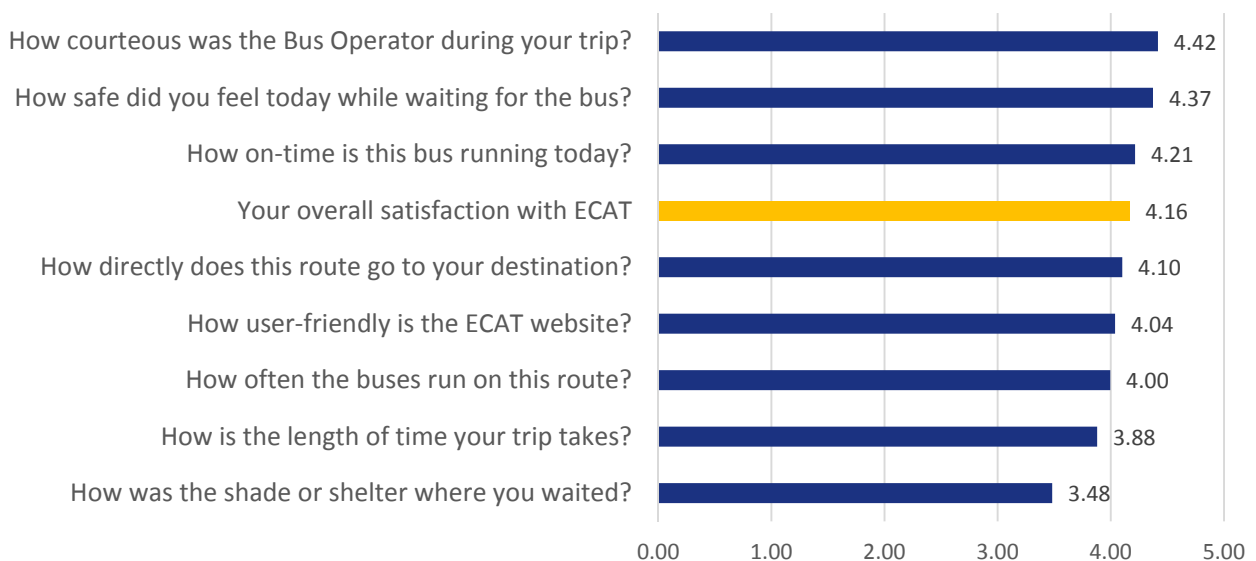
Home ZIP Code	Number of Responses
32505	204
32514	145
32506	117
32507	106
32501	102
32503	94
32526	43
32534	40
32502	26
32504	24
Other	219

Customer Satisfaction

Customer service and general satisfaction questions identified passenger satisfaction levels, recommendations for service improvements, and overall perception of ECAT bus services.

Passengers were asked to rate their experience with various aspects of ECAT’s services during their current bus trip (Figure 4-29), using a scale of 1 to 5, with 1 being “very poor” and 5 being “very good.” Passengers indicated they were most satisfied with the courteousness of the bus operators, with an average rating of 4.42, and least satisfied with the shade/shelter provided at the bus stop, with an average rating of 3.48. Passengers provided an overall rating of 4.16 when asked about their overall satisfaction with ECAT.

Figure 4-29: How satisfied are you with each of the following?



On-Board Survey General Conclusions

Results from the on-board survey provided insight into various aspects of ECAT bus service. Conclusions drawn from the on-board survey analysis are summarized as follows:

- Overall, most ECAT passengers rated various aspects of ECAT services as “very good” or “good” and provided an overall average rating 4.16. Frequency of buses on their route, length of time their trip takes, and shelter/shade as bus stops were the three areas that passengers rated the lowest. Bus driver courtesy, safety of the bus, and on-time performance were the areas rated the highest.
- Approximately 70% of passengers used the bus three or more days per week.
- A lack of access to a working vehicle or valid driver’s license were noted as primary reasons why many passengers used ECAT for their transportation needs.

- More service on Saturdays, earlier/later service on existing routes more, and frequent service were indicated as the most desirable service improvements for ECAT.
- Approximately 19% of passengers indicated they were transit-dependent and would not be able to make this trip if not for the bus.
- The regular base fare was paid by approximately 45% of respondents, and 9% paid the student fare. A notable fare category included military personnel who are not charged a fare if in uniform and receive a reduced fare with an active military ID.

Connections 2026 TDP Website and Social Media

A website for the *Connections 2026* TDP (www.connections2026.com) was developed early in the project and launched in February 2016 to serve as a principal information portal for citizens and stakeholder agencies. In addition to hosting project-related information and documents, visitors to the website could access the online survey (in either English or Spanish), send comment/questions to the Project Team, or connect to the Facebook and Twitter pages established for the *Connections 2026* TDP or ECAT's LinkedIn page on which TDP-related information is provided. In the first months of the website being live, there were 395 total visits in February and March, 2016. Figure 4-30 shows snapshots of the *Connections 2026* TDP website and Facebook home page.

Figure 4-30: *Connections 2026* TDP Online Outreach Tools



Figure 4-30 (cont'd): *Connections 2026* TDP Online Outreach Tools



Previous Completed Outreach Activities

Other public outreach activities completed prior to or during the *Connections 2026* TDP development process that provide transit-related information and feedback from the community are summarized in this section.

Santa Rosa County Survey

Because of the continued grassroots effort to expand transit services in Santa Rosa County, Santa Rosa County was able to replicate the Escambia County survey for distribution to its residents, focusing on the provision of transit services within Santa Rosa County. A total of 605 surveys were submitted from Santa Rosa County within approximately one month.

The consensus was that public transit services must be provided in Santa Rosa County and that there was a need for additional transit service. The majority of respondents who think that there is a need for additional transit service in Santa Rosa County responded that additional transit services would allow for better commuting options and access to jobs (40%). Most of these respondents (56%) said that they type of service they would like to see more is frequent bus service, followed by increase coverage area (22%). Most (64%) responded that they are willing or somewhat willing to pay additional taxes for an expanded transit

system. The respondents were mostly in the 45–64 age group (48%) and represented a high mix of income groups. Figures 4-31 through 4-37 summarize the most salient questions.

Figure 4-31: What do you think of public transit services in Santa Rosa County?

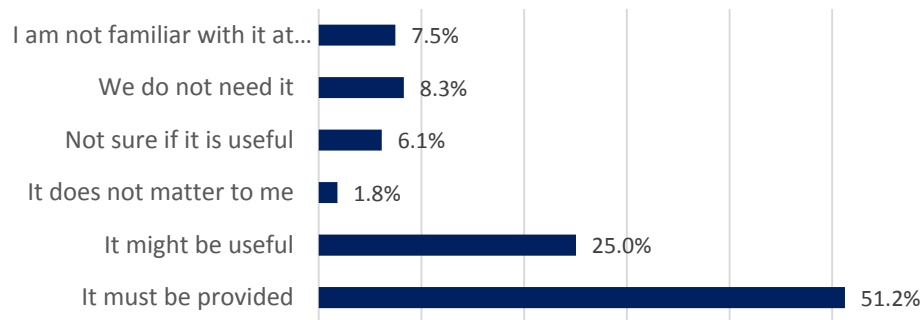


Figure 4-32: Do you think there is a need for additional transit service in Santa Rosa County? (Question 8)



Figure 4-33: If you answered yes to Question 8, what benefits of transit do you believe could occur as a result of additional service?

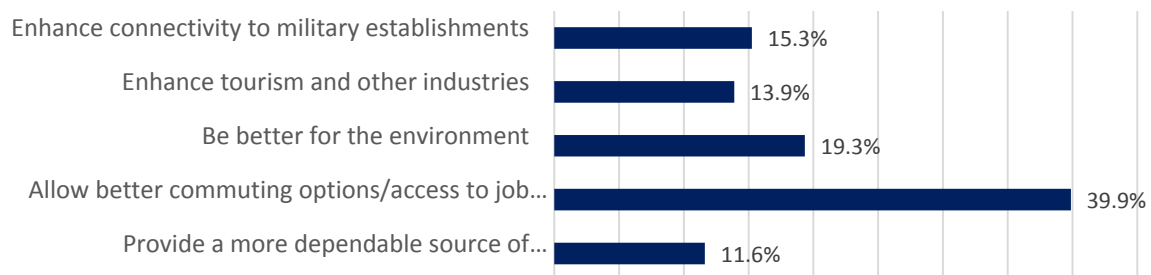


Figure 4-34: If you answered yes to Question 8, select the type of service you would most like to see:

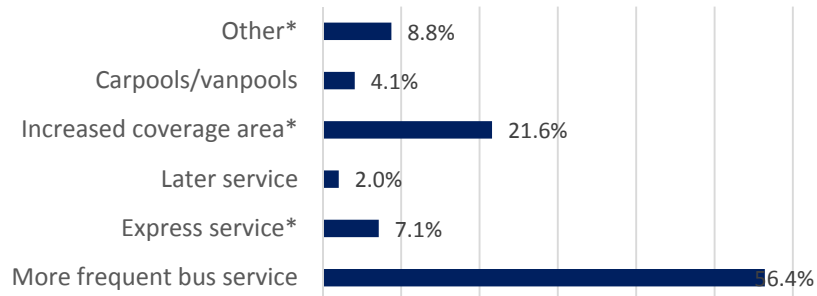


Figure 4-35: Are you willing to pay additional local taxes for an expanded transit system?

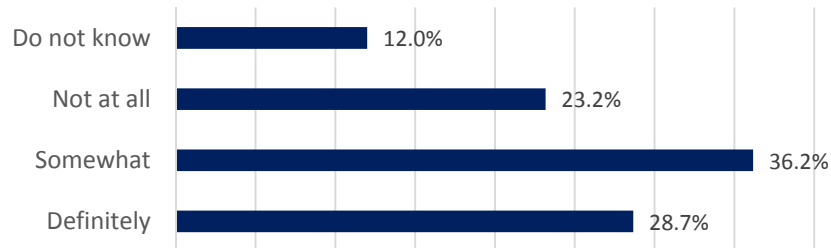


Figure 4-36: Your age is?

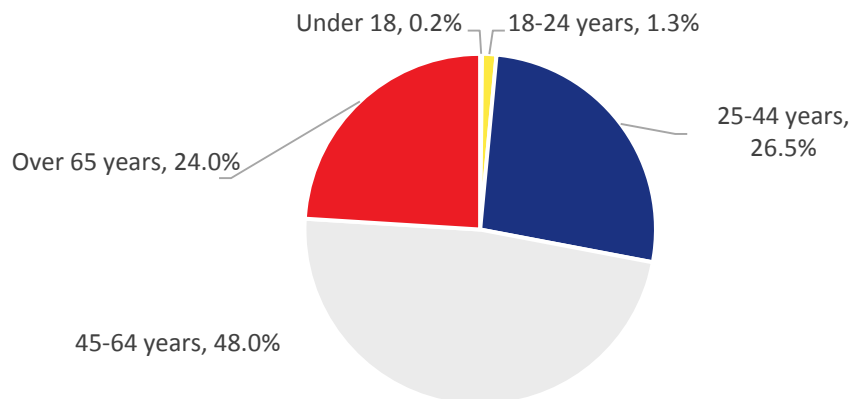
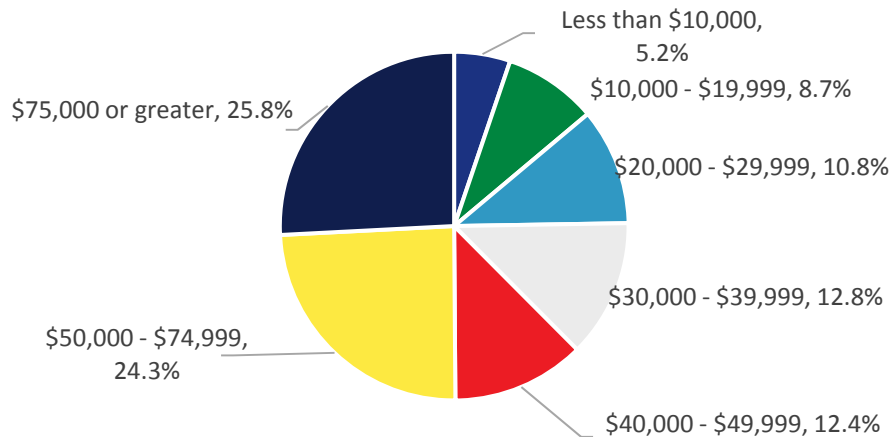


Figure 4-37: What is the range of your total household income for 2015?



Santa Rosa County Transportation Disadvantaged Service Plan (TDSP) 2015 Update Survey

The annual survey conducted for the Santa Rosa County community transportation helps to evaluate progress towards vision attainment. The 2015 survey results indicate that 35% of the trips were for school/work purposes and 27% were for medical/dental. Notably, 53% indicated using community transportation 11 or more days per month. If community transportation was not provided, 33% indicated they would carpool and 33% would find other means (e.g., taxi, family, walk, etc.), and 17% indicated they would not be able to make the trip.

A common comment was the need for weekend transit service. One respondent stated that “if bus service could be extended to Pensacola daily, that would be good.” Most respondents were satisfied with the on-time performance and dependability of the paratransit service in Santa Rosa County. The final destination the respondents were to medical appointments, school, work or other. Most respondents use the community transportation service five or more times per month. If not by community transportation, one-third of respondents would carpool to make their trip and one-third would use some other means.

2040 Long Range Transportation Plan (LRTP)

The public outreach process for the ongoing 2040 LRTP included efforts to reach existing ECAT riders. A display about the LRTP was set up at the ECAT Transfer Center, and a list of questions and responses from interested persons was forwarded to ECAT. A survey was administered for the LRTP that included various questions about transportation in the region. Findings from this survey are provided in the 2040 Needs Plan Technical Report, highlights of which include the following:

- The majority of respondents (66%) indicated there are not enough transportation choices in the region.
- The most critical transportation issue facing the region is traffic congestion (56%).
- When asked how they would spend on transportation projects, respondents were twice more likely

to allocate funding to maintain existing roads than to add new buses or develop premium transit.

- More than half (57%) of respondents had three or more vehicles in their household, indicating that a high percentage of respondents are likely not transit-dependent.

Orange Beach Transit Feasibility Study

The Florida-Alabama TPO provided federal urban transit funds to study the feasibility of establishing a seasonal beach trolley loop connecting the Alabama-Florida state line with Gulf Shores along the beach highway. As part of the public outreach efforts for this ongoing study, a public survey was administered. Highlights from this study include the following:

- The Wharf, Orange Beach's Beach District, and Canal Road West District are the most popular areas of Alabama's Gulf Coast to which survey respondents most often travel for leisure and recreation.
- Dining, shopping, and visiting the beach were the three top activities (in order of most frequently selected) for which respondents indicated they usually use a personal vehicle.
- Although approximately two-thirds of survey respondents indicated they do not have trouble getting their transportation needs met, they also indicated that they would consider using public transportation, if available, to get around Orange Beach and the surrounding areas.
- The three most important service characteristics for non-work travel needs were stop location and low cost (52%) and convenient service hours (48%). Approximately 19% indicated that no service improvements would encourage them to use transit. The ability to use a park-and-ride facility to access the bus (24%) and travel time compared to other modes (21%) rounded out the least population service characteristics.
- The majority (77%) indicated that they would consider using a regularly-scheduled bus/shuttle route over door-to-door service or other type of transit.
- Friday and Saturday evening service were the most popular choices when asked what days of the week and time of day participants feel they would most likely use public transportation.
- The majority (52%) indicated that they would be willing to pay \$0.50–\$2.00 per ride for transit service.

Escambia County Transportation Disadvantaged Service 2015 Update Survey

The Escambia County TDSP is an annually-updated tactical plan jointly developed by the State-designated Planning Agency (WFRPC) and the CTC and contains development, service, and quality assurance components. The LCB reviews and approves the TDSP, which is submitted to the Florida CTD for final action. A survey is completed as part of the TDSP annual update and compared to the results of the prior year. The 2016 survey is in the process of being completed at this time. Key findings from 2015 highlight the overall satisfaction of users with the service as well as their need to use the service and include the following:

- The percentage of respondents that rate dependability of service has consistently increased,

reaching a high of 65% in 2015.

- A total of 92% rated the service running when they need it as “very good” or “good,” and 85% rated the ease of arranging trips as “very good” or “good.”
- The majority (69%) rated the comfort/cleanliness of the buses as “very good.”
- The majority (73%) rated the safety and reliability of drivers as “very good.”
- The majority rated waiting times (within 30 minutes of scheduled time) and on-time arrival as “very good,” at 53% and 56%, respectively.
- The majority (61%) rated the cost of their trip as “very good” and 26% rated it as “good.”
- The majority (52%) indicated that they use TD services 11+ days per month, and 40% indicated that they would not make their trip if TD service was not available (compared to 10% who indicated they would drive, 21% who indicated they would carpool, 12% who indicated they would use bus service, and 17% who indicated they would use other transportation options).

Section 5: Situation Appraisal

The section reviews the transit at local, regional and national levels of government. Various transportation planning and programming documents are summarized, and issues that could impact ECAT's services and performance are noted, followed by a Situation Appraisal. The Situation Appraisal synthesizes the previous efforts in the TDP and the plans review to develop the situation appraisal, which assesses the operating environment for EC Rider with respect to land use, state and local transportation plans, socioeconomic trends, organization issues, technology, and 10-year transit ridership projections. The situation appraisal serves as the basis for the formulation of EC Rider's service needs and future goals and objectives.

Review of Plans and Studies

A review of selected federal, regional, and local plans, programs, land development codes, and studies that influence transit operations, infrastructure, and policy was conducted to understand the potential implications for EC Rider service. Findings from this review will help to ensure that development of the *Connections 2026* TDP is consistent with other local planning efforts and help Escambia County to better understand its transit operating environment. Table 5-1 summarizes the plans and studies that were reviewed for this effort and provides an overview of the relevant goals and policies and key considerations for the *Connections 2026* TDP Situation Appraisal.

Table 5-1: Summary of Reviewed Plans, Studies, and Policies

Federal Documents
Fixing America's Surface Transportation (FAST) Act
State Plans/Programs
2060 Florida Transportation Plan
State of Florida Transportation Disadvantaged (TD) 5-Year/20-Year Plan
State Growth Management Legislation (House Bill 7207) (June 2011)
Regional Documents
The Directions 2040 Long Range Transportation Plan (2015 Draft)
Florida-Alabama TPO 2016–2020 TIP (amended April 2015)
Potential Gulf Coast Service Restoration Options
Key Local Documents
Escambia County 2030 Comprehensive Plan (February 2015)
City of Pensacola Comprehensive Plan (July 2011)
ECAT TDP Major Update FY 2012–2021 (September 2011)
ECAT Comprehensive Operational Analysis (December 2014)
Escambia County Transportation Disadvantaged Service Plan FY 2016 Annual Update (May 2015)
Escambia County Area Transit 2015 Public Workshops: Proposed Route Modifications for Route 41 & 42 (July 2015)
Pensacola Bay Ferry System
Ladders of Opportunity Funding Initiative
Main Street Corridor Management Plan (August 2014)

Federal Documents

FAST Act

The Fixing America's Surface Transportation (FAST) Act, passed on December 4, 2015, replaces the Moving Ahead for Progress in the 21st Century (MAP-21) federal transportation bill that expired on May 31, 2015. It is the first federal law in more than a decade to provide long-term funding certainty for surface transportation infrastructure planning and investment. The FAST Act authorizes \$305 billion over fiscal years 2016–2020 for highway, highway and motor vehicle safety, public transportation, motor carrier safety, hazardous materials safety, rail, and research, technology, and statistics programs. FAST focuses on safety, keeps intact the established structure of various highway-related programs, continues efforts to streamline project delivery, and, for the first time, provides a dedicated source of federal dollars for freight projects.

Among the impacts to transit are FTA's Bus and Bus Facilities program, which received an increase in funding of \$268 million over FY 2015 levels, for a total of \$696 million for FY 2016. This program helps transit agencies fund new buses and replace aging fleets and facilities and adds a new eligibility to deploy low- or no-emission vehicles. FAST also re-established a Bus Discretionary Program that allows states to apply for project-specific funding via a competitive process. Many of the grants are expected to fund replacements for aging fleets or facilities. In FY 2016, \$268 million will be available under this program. Of that amount, \$55 million has been designated for Low- or No- Emission Bus Deployment projects. Other key items of note include the following:

- Funds the Bus and Bus facilities Program pilot program for Cost-Effective Capital Investment, which encourages states to share bus funding resources among a partnership of recipients.
- Increases dedicated bus funding by 89% over the life of the bill.
- Provides both stable formula funding and a competitive grant program to address bus and bus facility needs.
- Reforms public transportation procurement to make federal investment more cost-effective and competitive.
- Consolidates and refocuses transit research activities to increase efficiency and accountability.
- Establishes a pilot program for communities to expand transit through the use of public-private partnerships.
- Provides flexibility for recipients to use federal funds to meet their state of good repair (SGR) needs.
- Provides for the coordination of public transportation services with other federally assisted transportation services to aid in the mobility of older adults and individuals with disabilities.

FAST provides increased and stable funding for transit over the next five years and more flexibility for state and local governments.

State Plans/Programs

2060 Florida Transportation Plan

The 2060 Florida Transportation Plan (FTP) is a fundamental transportation plan for all of Florida, including local, regional, and state partners who make decisions about future transportation investments. It creates a shared vision for the future of transportation in Florida and the goals, objectives, and strategies to achieve this vision over the next 50 years. The latest FTP was finalized in December 2010 and calls for a profoundly different transportation system from today's system, including the following:

- A statewide, multimodal transportation system that supports Florida's economic and livability goals by providing better connectivity to both urban and rural areas.
- Greater reliance on public transportation systems for moving people, including statewide passenger rail network and enhanced transit systems in Florida major urban areas.
- A statewide, multimodal system of trade gateways, logistics centers, and transportation corridors to position Florida as a global hub for commerce and investment.
- An evolving air and space transportation system enabling Florida to remain a global leader for moving people and cargo between Florida and destinations in other states, nations, and orbit.
- A new generation of infrastructure, vehicles, fuels, and technologies to enable travel with fewer crashes, reduced delay, and fewer emissions.

Based on these core values of the 2060 FTP, public transportation plays an important role in shaping the Florida's transportation systems in the future. This implicates the necessities for Escambia County to comply with the 2060 FTP by implementing more rigorous public transportation development approach.

The 2060 FTP supports the development of state, regional, and local transit services through a series of related goals and objectives, emphasizing new and innovative approaches by all modes to meet the needs today and in the future.

State of Florida Transportation Disadvantaged 5-Year/20-Year Plan

Developed by the Commission for the Transportation Disadvantaged (CTD), this plan is required under the Florida Statutes and includes the following elements:

- Explanation of the Florida Coordinated Transportation System
- Five-Year Report Card
- Florida Office of Program Policy Analysis and Government Accountability Review
- Strategic Vision and Goals, Objectives, and Measures

The five-year and long-range strategic visions were reviewed and used for guidance and are indicated below.

Long-Range Strategic Vision

The long-range strategic vision seeks to create a strategy for the Florida CTD to support the development of a universal transportation system with the following features:

- A coordinated, cost-effective multimodal transportation system delivered through public-private partnerships.
- A single, uniform funding system with a single eligibility determination process.
- A sliding scale of fare payment based on a person's ability to pay.
- Use of electronic fare media for all passengers.
- Services that are designed and implemented regionally (both inter-county and inter-city) throughout the state.

Five-Year Strategic Vision

The five-year strategic vision seeks to develop and field-test a model community transportation system for persons who are transportation disadvantaged by incorporating the following features:

- Statewide coordination of community transportation services using Advanced Public Transportation Systems including Smart Traveler Technology, Smart Vehicle Technology, and Smart Intermodal Systems.
- Statewide coordination and consolidation of community transportation funding sources.
- A statewide information management system for tracking passenger eligibility determination.
- Integration of Smart Vehicle Technology on a statewide multimodal basis to improve vehicle and fleet planning, scheduling, and operations. This effort includes vehicle and ridership data collection, electronic fare media, and geographic information system (GIS) applications.
- Development of a multimodal transportation network to optimize the transportation system as a whole using Smart Intermodal Systems. This feature would be available in all areas of the state via electronic access.

The Florida TD 5-Year/20-Year Plan seeks to develop and field-test a model community transportation system for persons who are transportation disadvantaged and create a strategy for the Florida CTD to support the development of a universal transportation system.

State Growth Management Legislation (House Bill 7207) (June 2011)

HB 7207 repeals most of the State-mandated growth management planning laws that have governed development activities within Florida since the original Growth Management Act of 1975, including transportation concurrency.

HB 7207 provides local governments the opportunity to develop a more localized concurrency program that aligns with the development and mobility goals of the community and strengthens legislative language that supports multimodal approaches to transportation by stating that Comprehensive Plan Transportation Elements “shall provide for a safe, convenient multi-modal transportation system.”

Regional Documents

The Directions 2040 Long Range Transportation Plan (2015 Draft)

The Florida-Alabama Transportation Planning Organization (TPO) is currently developing the regional 2040 Long Range Transportation Plan (LRTP), a 20-year blueprint for maintaining and enhancing the regional transportation system that outlines the year-by-year methods to reach those transportation-related goals for the urbanized areas of Pensacola, which overlaps Escambia, Santa Rosa, and Baldwin (AL) counties. Although these goals are determined at the local level, they must be consistent with federal and state requirements to maintain funding.

The Florida-Alabama TPO envisions a multi-modal transportation system that improves quality of life, increases the region’s economic competitiveness, and protects the environment. The mission of the Directions 2040 LRTP is to promote the “safe, secure, and efficient movement of people and goods by providing a transportation system that offers mobility options for all.” The LRTP focuses on preserving the existing transportation system and meeting user needs. With respect to transit, the LRTP calls for increasing the security for transit users and developing a “multimodal transportation system that affords users modal choices, such as mass transit, transit circulation, park-and-ride lots, rail, bus rapid transit, replacing deficient buses and shelters, and expanding transit services to improve accessibility, availability, and desirability of transit travel options.

The proposed transit needs that have been included the Directions 2040 LRTP Needs Plan that will enhance transit services for Escambia and Santa Rosa counties are listed in Table 5-2. A total of seven peak hour express bus services and two peak hour commuter rail services that connect the urbanized areas in the tri-county area have been identified as regional transit needs. Other projects included in the Needs Plan are:

- Complete Streets Program to address sidewalk and bike land gaps in the Bike/Pedestrian Master Plan
- Transit program to implement TDP improvements and projects for Escambia and Santa Rosa counties
- 10 new park-and-ride lots along express transit routes
- Implementation of TDP improvements and projects under the transit program
- Implementation of paratransit programs and projects in Escambia and Santa Rosa counties

Table 5-2: Florida-Alabama TPO LRTP Proposed Needs Plan Projects (Peak Hour Bus Service Transit)

Corridor	From	To	County	2025 Needs Plan	2035 Needs Plan
Express Bus – East	Downtown Pensacola	SR 281 & SR 87 via I-10	Escambia/ Santa Rosa	Partial	Yes
Express Bus – SE	Downtown Pensacola	Garcon Point & Navarre via US 98	Escambia/ Santa Rosa	Yes	Yes
Express Bus – NW	Downtown Pensacola	Nine Mile Road via I-10	Escambia	Partial	Yes
Express Bus – SW	Downtown Pensacola	Lillian, AL via US 98	Escambia/Baldwin	No	Yes
Express Bus – NE	Downtown Pensacola	Milton via US 90	Escambia/ Santa Rosa	Partial	Yes
Express Bus – Navarre E	Navarre	Hurlburt Field (Okaloosa County)	Santa Rosa/ Okaloosa	No	Yes
Express Bus – Cordova–Downtown	Cordova Mall	Downtown Pensacola (City Hall)	Escambia	No	No
Commuter Rail East	Downtown Pensacola	Milton	Escambia/ Santa Rosa	No	Yes
Commuter Rail West	Downtown Pensacola	Cantonment Area	Escambia	No	Yes

The 2040 LRTP Cost Feasible Plan includes capital projects to replace buses and shelter amenities, two new express service routes, and transit funds to support existing service (see Table 5-3). The plan excludes the 10 park-and-ride lots and 4 express transit routes from the Needs Plan, but maintains the routes connecting Pensacola to Lillian, Milton, and the intersection of US 90 A and I-10.

Table 5-3: Adopted 2040 Cost Feasible Plan – Non- SIS-Funded Projects

Project Name	From	To	Improvement	PD&E	Design	ROW	CST/CEI
Public Transportation Capital Improvements	Capital projects may include purchase of replacement buses or shelter amenities		\$300 000 Annually	NA	NA	\$0	\$28M
Express Bus Service NW	Pensacola	Navy Federal via I-110	New bus route/service	\$200k	\$500k	\$1.8M	\$4.6M
Express Bus Service NE	Milton	Navy Federal via US 90	New bus route/service	\$300k	\$800k	\$3M	\$7.3M
Transit Funds for Existing Service	System wide funding to maintain existing service			\$6,131,448 annually			

Figures 2-5 and 2-6 in Section 2 depict the 2040 Needs Plan projects and the Non-Strategic Intermodal System (SIS) Funded 2040 Cost Feasible Plan projects, respectively.

The Directions 2040 LRTP contains “boxed” funds to support transit, including operations for new express buses, capital improvements such as bus and shelter replacement, and funding to maintain existing services. Also included is funding for new express bus service that will run from Pensacola to Navy Federal and Milton to Navy Federal.

Florida-Alabama TPO 2016–2020 TIP (amended April 2015)

The purpose of the Transportation Improvement Program (TIP) is to provide a multimodal project listing that reflects the needs and desires of the Florida-Alabama TPO urbanized area for the next five years. The TIP also is developed annually to reflect the financial restraints within the various funding sources and programs and as part of the Florida-Alabama TPO’s Transportation Study Certification Process. Preparation and maintenance of the TIP is one of several prerequisites to continued receipt of federal surface transportation funds. The TIP consists of improvements recommended from the transportation systems management and LRTP and is developed through a continuing, comprehensive, and coordinated effort involving the FDOT’s Five-Year Construction Plan. Data required for the balance of the TIP are assembled from input provided through the Technical Advisory Committee, the Transportation Systems Operations Committee, the Bicycle/Pedestrian Advisory Committee, and the Citizens Advisory Committee.

The current TIP was adopted on June 11, 2014, for FYs 2015–2019. Priority projects listed in this TIP for Escambia County include highway widening projects, intersection improvements, West Florida Regional Planning Council (WFRPC) regional commuter assistance, sidewalk and bicycle lane improvements, and funding for various ECAT related projects such as:

- Capitalized maintenance to upgrade technology and equipment
- Operating assistance
- Operating assistance for Davis Highway (SR 291) urban corridor improvements
- Buses and bus facilities
- Construction of the Pensacola Ferry Landing and supporting facilities at Plaza de Luna

The Florida-Alabama TPO’s adopted TIP includes funding for transit to upgrade equipment and technology, operations, operating assistance for the SR 291 corridor improvements, buses, and facilities. The construction of the City of Pensacola Ferry Landing will provide access to the National Park Service–Gulf Islands National Seashore.

Potential Gulf Coast Service Restoration Options

In mid-2015, the Southern Rail Commission (SRC) commissioned Amtrak to evaluate potential service restoration options along the Gulf Coast. The report summarizes the operating characteristics of potential

service options and forecast performance so the SRC can identify the service plan that would best serve the region. Of the five evaluated alternatives and sub-alternatives, Amtrak identified Alternatives A/A1 as providing the best balance of operating costs and ridership benefit. Alternative A travels from New Orleans to Orlando, with a single State-supported train priced under PRIIA 209 between New Orleans and Mobile. This alternative also was evaluated without the State-supported service, as Alternative A1, which has the lowest forecast operating funding need of all evaluated alternatives. A stable, multi-year operating funding mechanism for the additional long distance service would have to be developed that is beyond the scope of the Passenger Rail and Investment Improvement Act (PRIIA) 209 State-supported pricing.

Amtrak ceased service to Escambia County in 2005. The study on returning passenger rail to the panhandle region highlights the continuing need for transit to serve regional markets that extend to major cities like New Orleans, Mobile and Orlando. A test run with an Amtrak passenger train was conducted on February 2016, with a stop in Pensacola.

Key Local Documents

Escambia County 2030 Comprehensive Plan (February 2015)

The Escambia County Comprehensive Plan is the primary policy document concerning land use, transportation, and other planning categories for the County. It consists of 11 Elements, with those relevant to the TDP process including the Concurrency Management System, Future Land Use, Mobility (Transportation), and the Escambia County Optional Sector Plan.

The **Mobility Element (MOB)** emphasizes multi-modalism, coordinated planning with the Florida-Alabama TPO and FDOT, LOS for automobiles, route modernization, annual review of the transit system, encouragement of bicycle and pedestrian facilities for new development mass transit right-of-way, and continued support of the paratransit system. All new public road construction projects in urban areas must accommodate non-motorized transportation such as sidewalks and bicycle facilities, at a minimum. The mobility plan, with respect to transit, is largely reactive to projected growth patterns of the service area. The following mobility goals, objectives, and policies that support and are relevant to transit are included below (and, therefore, are not numbered sequentially):

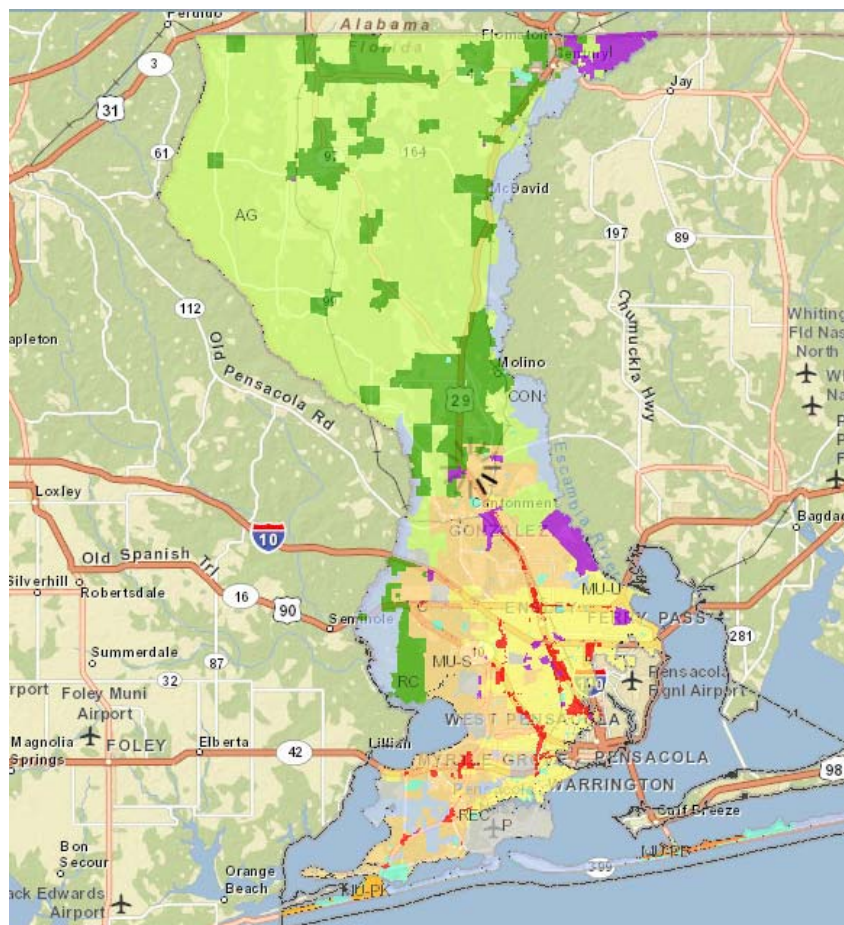
- **MOB Policy 1.1.3: Non-motorized Transportation.** All new public road construction projects in urban areas or community redevelopment areas will accommodate non-motorized transportation. At a minimum, sidewalks and bicycle facilities should be included. Consideration should also be given to include storage racks, striping, or signage.
- **MOB Policy 1.1.8: Commuter Assistance Programs.** Escambia County will support the TPO commuter assistance programs in order to reduce the number of vehicle miles traveled (VMT) per capita in the community and region. The County will use the TPO collected data to monitor VMT and will coordinate with FDOT regarding VMT as it relates to large developments.

- **MOB Policy 1.1.11: Required Bicycle and Pedestrian Facilities.** Escambia County will encourage through private/public partnerships the installation of sidewalks along the street frontage of new development (including but not limited to new development along routes shown on the TPO Bicycle and Pedestrian Plan, the County’s Bicycle and Pedestrian Plan, or the “Transportation Alternative” Plan) to provide connectivity and utility for existing sidewalks in the vicinity of the development.
- **MOB Objective 1.2: Transportation and Land Use.** Assure the continual coordination of land use decisions with the future traffic circulation system by coordinating traffic circulation improvements with the Future Land Use Map (FLUM) and maintaining consistency between land use decisions and traffic circulation system improvements.
- **MOB Policy 1.2.2: Non-motorized Transportation Facilities.** Escambia County will provide or require the provision of non-motorized transportation facilities to link residential areas with recreational and commercial areas in a safe manner. This may include the construction of sidewalks, bike lanes, installation of signage, striping of roadways, or the like so as to accommodate non-motorized transportation facilities.
- **MOB Objective 1.3: Coordinated Transportation Planning.** Continually coordinate Escambia County’s decision-making process with the plans and programs of TPO and FDOT.
- **MOB Goal Transit.** Escambia County will encourage the provision and use of a safe, efficient, and financially feasible mass transit transportation system, which is responsive to the community’s needs, consistent with land use policies, and environmentally sound and that promotes economic opportunity and energy conservation.
- **MOB Objective 2.1: Bus Fleet.** Ensure safe and efficient operation of the bus fleet.
- **MOB Policy 2.1.1: Fleet Replacement.** ECAT will replace the bus fleet at 10 years or 500,000 miles, as recommended by the Federal Transit Administration (FTA). The ECAT Map Series is included in the Plan as Exhibit H.
- **MOB 2.1.2 Preventive Maintenance.** ECAT will conduct preventive maintenance of the bus fleet according to the preventive maintenance plan.
- **MOB Objective 2.2: Mass Transit and Growth Patterns.** Operate an efficient and accessible fixed route mass transportation service in support of the projected growth patterns of the service area while maintaining or increasing ECAT’s operating ratio.
- **MOB Policy 2.2.1: Route Modernization.** ECAT will modernize service from the existing radial route system into a modified grid system to improve efficiency.
- **MOB Policy 2.2.2: Service Area Adjustments.** ECAT will realign or adjust existing routes to provide service to areas requiring service while at the same time reducing service to lower-use areas in order to provide more efficient service to more riders at comparable cost.

- **MOB Policy 2.2.3: LOS Standard.** ECAT will establish and maintain a mass transit LOS standard as measured by a 60-minute maximum period of wait throughout the current areas and hours of service.
- **MOB Policy 2.2.5 Transportation Development Plan Implementation.** Upon completion of the TPO Transit Development Plan Update, Escambia County will amend the comprehensive plan to address (1) the establishment of land use and site design guidelines in public transit corridors, which will assure the accessibility of new development to public transit; (2) the establishment of numerical indicators against which the achievement of mobility goals can be measured; and (3) coordination with the Future Land Use element, which will encourage land uses that promote public transportation.
- **MOB Policy 2.2.6: Marketing Strategy.** ECAT will develop marketing strategies to maximize the advertisement program within fiscal constraints.
- **MOB Policy 2.2.7: User Fee/Fare Policy.** ECAT will develop a fare policy to provide for routing fare increases in order to ensure the transit riders pay a fair share of costs (user fee policy).
- **MOB Objective 2.3: Annual Review of Transit System.** Provide for an efficient and safe transit system for all users.
- **MOB Objective 2.4: Mass Transit ROW.** Designate and protect future mass transit rights-of-way and corridors.
- **MOB Policy 2.4.1: Consistency Review.** ECAT will provide for the review of the future mass transit map prior to the issuance of any land use certificate to determine if development would conflict with any existing or future mass transit rights-of-way or corridors as approved by the BCC.
- **MOB Policy 2.4.2: Special Review Process.** ECAT will develop a special review and approval mechanism for any land use certificate that is found to be in conflict with existing or future mass transit rights-of-way or corridors approved by the BCC.
- **MOB Objective 2.5: Handicapped Services:** Provide service to the handicapped as required by U.S. Department of Transportation Regulation 49 CFR Part 27 and to other transportation disadvantaged persons.
- **MOB Policy 2.5.1: Paratransit System Support.** ECAT will contract or otherwise provide for the coordinated paratransit system to fulfill the federal requirements for transporting handicapped passengers and will contract or otherwise provide for the system to fulfill federal requirements for transporting handicapped passengers.
- **MOB Policy 2.5.2: Vehicle Rehabilitation.** ECAT will provide assistance to the coordinated system by rehabilitating vehicles or other similar programs that will support their efforts.
- **MOB Policy 2.5.3: Service Improvements.** In order to continually improve services, education and individual transit training for disabled passengers and volunteer companions should be provided.

The **2030 Future Land Use Element** for Escambia County, as illustrated in Figure 5-1, generally concentrates rural, agricultural, conservation, and industrial uses in the northern half of the county, with more intensive development designations in the south-central portion of the county. The following key corridors are designated for commercial development (depicted in red): US 90, US 98, US 29 (along southern half of Escambia), SR 297, and a cluster of commercial use at the intersection of SR 173 and US 98. Higher-performing transit services could be concentrated along these corridors. The majority of these commercial areas is surrounded by designated Mixed-Use/Suburban (depicted in orange) and Mixed-Use/Urban (depicted in yellow) zones, a strategy that could improve transit performance in the future as this type of land use as local routes can be concentrated in these areas, thus allowing for a more efficient use of resources. The upper portion of the county is zoned for less-intense uses and focus on conservation and preservation of the land through residential conservation (depicted in green) and agriculture (depicted in light green) land uses.

Figure 5-1: Escambia County Future Land Use 2030



Red = Commercial Development; Green = Residential Conservation; Light Green = Agriculture;
Orange = Mixed-Use/Suburban; Yellow = Mixed-Use/Urban

Source: <http://myescambia.com/comprehensive-plan-and-land-development-code>

The **Optional Sector Plan** is a unique planning tool in Florida that was established to create more sustainable development patterns for large geographic areas. It was developed as an alternative to the Developments of Regional Impact (DRI) process. The plans are approved through the comprehensive plan amendments upon written agreement with the Florida Department of Economic Opportunity (DOE). The adopted Midwest Escambia County Optional Sector Plan encompasses approximately 15,000 acres north of I-10, west of Highway 28, and south of Highway 196. Key strategies in this plan that are supportive of transit include mixed use land use patterns, clustered, compact neighborhoods and centers, intermodal connectivity, pedestrian and bicycle access, reductions in vehicle trips, emphasis on a transit-oriented Town Center and Neighborhood Centers, Village Centers, and incorporation of transit facilities. The plan establishes development standards for land-use mix, minimum residential density, maximum floor area ratio, and maximum gross floor area.

The previous TDP identified future challenges that the Optional Sector Plan might pose for ECAT. For example, the Midwest Sector Planning Area is well outside of ECATS' current service area and would require new capital and operating resources to extend service to that area of the county.

Escambia County does not require roadway concurrency for development; however, the County monitors and requires intersection analyses to evaluate the impacts of new development on the roadway system. Escambia County has established concurrency for development that places the demand of additional ridership on mass transit. The concurrency service area for mass transit facilities is those lands located along the fixed ECAT routes, as they are subject to change. The County requires quantitative methods be used to determine if mass transit facilities have the available capacity at their adopted levels of service to accommodate the demands generated by the proposed uses or activities.

It is worth noting that, according to the County's Land Development Code, when applicable, a representative from ECAT reviews site development plans in the approval process. Developments with an entrance located 200 feet of an existing transit stop must construct a sidewalk from the entrance to the transit stop. The previous TDP noted that parking policies within the county are somewhat disparate. Although some call for the provision of plentiful free or low-cost parking, other policies support a reduction in overall parking capacity and encourage off-site facilities for employee parking coupled with a more multi-modal travel approach including enhanced pedestrian and transit.

The Mobility Element emphasizes multi-modalism, coordinated planning with the TPO and FDOT, LOS for automobiles, route modernization, annual review of the transit system, encouragement of bicycle and pedestrian facilities for new development mass transit ROW, and continued support of the paratransit system. The Optional Sector Plan provides opportunities to create a transit-supportive environment within the county that would require additional funding to meet the mobility needs of the residents. Overall, the FLUM concentrates urban development in strategic areas of the county that can create an environment that will better support transit.

City of Pensacola Comprehensive Plan (July 2011)

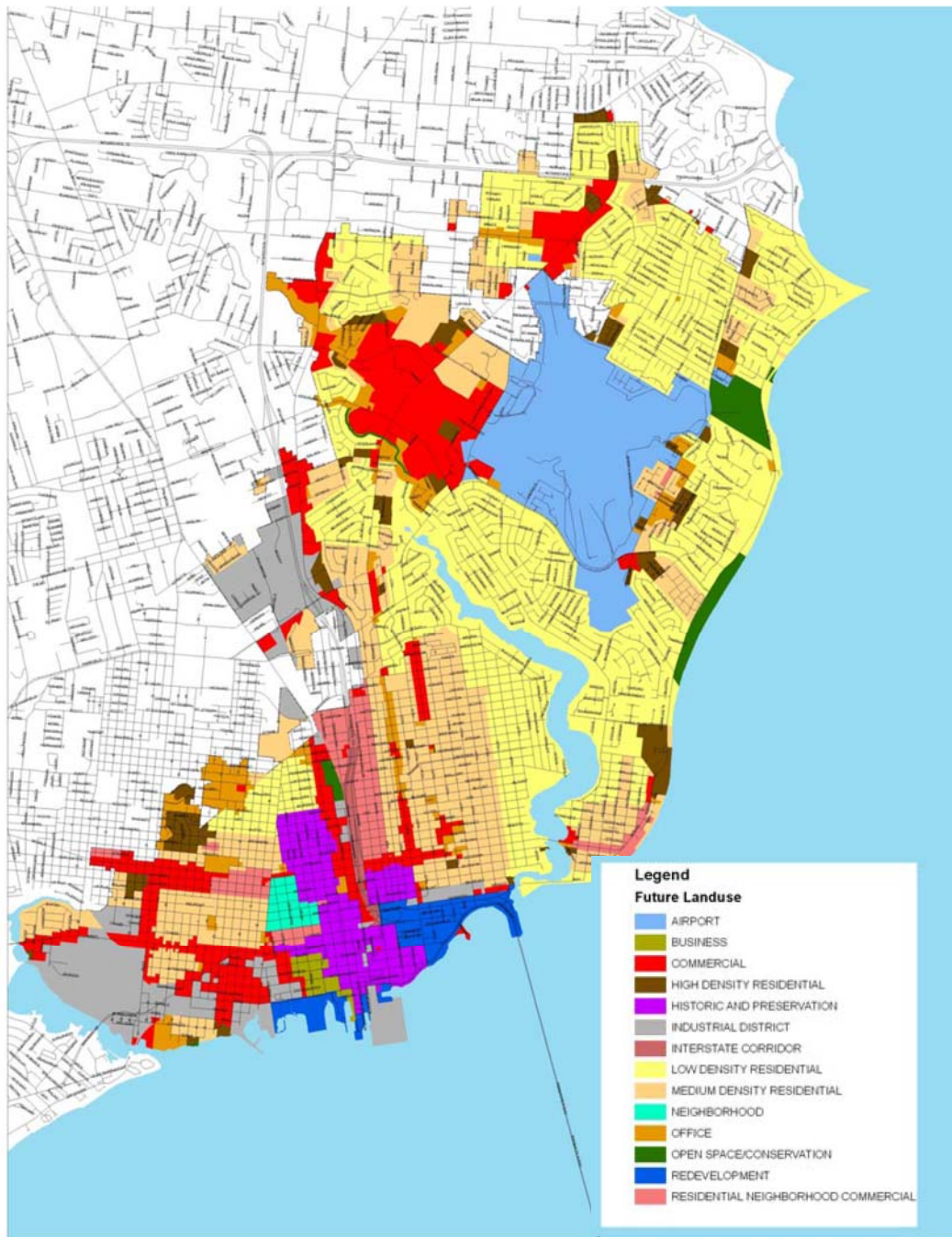
The City of Pensacola Comprehensive Plan is the primary policy document concerning land use, transportation, and other planning categories for the city. As the ECAT primarily serves the Pensacola area, the City of Pensacola's policies and land development regulations have a significant impact on the creating a transit supportive environment. The City of Pensacola's Comprehensive Plan was last updated in July 2011. The Comprehensive Plan emphasizes development of the downtown urban core, residential density bonuses, coordination with the FDOT, TPO and ECAT, the development of Complete Streets and promoting walkability and transit modes in the downtown CRA via the Transportation Concurrency Exception Area (TCEA) designation. Transit provisions are also incorporated in the Housing Element, and Conservation and Sustainability Element. It is the City's policy to create land-use and site-design guidelines to assure the accessibility of new development to mass transit service.

Although Pensacola has strong transit-supportive policies that include encouraging the pursuit of new sources of funding for mass transportation and coordinating with the Downtown Improvement Board (DIB) and West Florida Historic Preservation, Inc., to periodically review the feasibility and joint funding of the existing closed-loop trolley or shuttle service within the TCEA boundary, the City does not provide local funding. The future land use map, illustrated in Figure 5-2, depicts concentrated areas of commercial use in important corridors like US 29, North Pace Boulevard, Cervantes Street, North 9th Avenue, and the North Davis Highway.

The Appraisal Report for the Comprehensive Plan emphasizes the importance of ECAT in achieving the city's full growth potential while enhancing the quality of life. Coordination with ECAT for development opportunities are, therefore, important to promoting transit and alternative modes of transportation. The previous TDP identified several existing and planned features that support the provision of transit:

- The city's grid street pattern, which supports transit through shorter walking distances for pedestrians.
- Pedestrian-oriented infrastructure improvements.
- The Urban Redevelopment TCEA with the boundaries of the Community Redevelopment Area (CRA), which encourage development to occur in urbanized areas where infrastructure already exists.
- The established downtown area, which has a number of significant land uses that can facilitate a multimodal system: retail, office, residential, entertainment, cultural and recreational.
- Potential meeting of the density and intensity requirement through current zoning established in the Comprehensive Plan; the downtown area is zoned for high-density development throughout except areas as described in the Comprehensive Plan.
- Several connections within the established street network.
- Sidewalks along major and minor corridors within the downtown area that provide mobility for pedestrians who desire to walk.

Figure 5-2: City of Pensacola Future Land Use Map



Source: City of Pensacola Comprehensive Plan (July 2011)

The previous TDP, in combination with the City of Pensacola Comprehensive Plan Appraisal Report, identifies several opportunities that could be pursued that would positively impact transit. Each of these strategies, or a combination thereof, are conducive to the continued success of existing ECAT services and potential for future growth and expansion and include the following:

- The need to reestablish two-way streets in downtown Pensacola to facilitate economic development and enhance safety and connectivity. The elimination of one-way streets will need to be addressed prior to implementation of the Multimodal Transportation District (MMTD).
- Focusing on Transit-Oriented Development (TOD) or Transit Oriented Corridors (TOC), which includes a pedestrian orientation, high-density surrounding transit facilities, managed parking, and high-quality transit. TODs and TOCs provides an excellent opportunity to create higher-density transit destinations along the established transit system routes. In addition, it allows the City to designate higher-density uses for land around the transit stations. These TOD opportunities are excellent public/private partnerships that can enhance City-owned parking areas and enable a private developer to create transit-oriented development.
- Potential to expand or create a new TCEA, with a focus on urban infill development and redevelopment, downtown revitalization, or designated urban infill and redevelopment areas design. An example of a new TCEA would be the area near the proposed Airport Commerce Park.
- Incorporation of community design features that will reduce the number of automobile trips or vehicle miles of travel and will support an integrated, multi-modal transportation system.
- Inclusion of a higher mix of land uses that support multi-modal compatibility.
- Creation of an Uptown/Downtown Connection Plan; the emerging uptown area could be considered the commercial and residential areas bounded by Airport Rd to the north, Bayou Blvd to the south, 9th Ave to the east, and N Davis Hwy to the west.
- The City's implementation of a unique set of parking policies, including parking exemptions and an off-site parking agreement and a parking reduction for the Downtown Pensacola CRA. In contrast to minimum parking requirements, these policies can help create a denser, urban environment and a disincentive to choose transit. Reducing the requirements in other strategic areas and corridors of the city and allowing for shared parking would further enhance the parking policies.

The Comprehensive Plan encourages the provision of transit through the TCEA, waiving of off-street parking requirements in selected districts, shared parking policies, parking reductions in the Downtown CRA, promotion of redevelopment in the downtown urban core, and aspirations to complete a future complete streets program. The FLUM concentrates areas of commercial use in important corridors and is largely zoned low- to medium-density residential with sparse locations of high-density residential. The Comprehensive Plan calls for the creation of land use and site design guidelines to assure the accessibility of new development to mass transit service.

The plan also emphasizes coordination with ECAT and Escambia County in evaluating transit routes and assisting in the development of coordinated transportation systems for TD citizens.

ECAT TDP Major Update FY 2012–2021 (September 2011)

The Escambia County 2012–2021 TDP Major Update was completed in 2011, covering FYs 2012–2021. The TDP provides direction and input to the TPO’s Unified Planning Work Program, LRTP, and TIP. The goals, objectives, and strategies were developed based on public input and with an emphasis on community values and mobility needs. The seven goals developed are as follows:

- *Goal 1:* Expand service delivery for existing and potential customers to meet demand for transit services in Escambia County.
- *Goal 2:* Maintain and expand adequate capital infrastructure to ensure vehicles, facilities, customer amenities and bus stops achieve the highest standard of accessibility and comfort.
- *Goal 3:* Develop a comprehensive marketing, communications, and media relations program to effectively promote transit’s image, awareness, public embrace, and information materials.
- *Goal 4:* Evaluate and participate in community values and initiatives as they relate to future plans.
- *Goal 5:* Maximize safety and security for all transit services and facilities.
- *Goal 6:* Ensure prudent public stewardship of financial resources and secure additional funding for system maintenance and improvements.
- *Goal 7:* Pursue regional transportation needs with surrounding counties and the overall Pensacola Urbanized Area.

The TDP focused on the following areas of improvement for the 10-year planning horizon:

- Performance evaluation and monitoring of the existing system to increase use of ECAT’s current service network.
- Improvements to existing services in terms of one additional evening trip on weekends (Routes 1, 2, 42, 44, 48, 51, 55, 43, 45, and 47).
- Increased frequencies on high demand routes during peak periods (Routes 44, 48, and 55).
- One new route with dedicated service on 9th Avenue between Downtown Pensacola and the Cordova/medical complex.
- Bringing all system bus stops into compliance with ADA accessibility standards.

In addition to the focus areas, a candidate list of service improvements were compiled to be considered optionally and included in subsequent annual updates of the TDP or outside of the 10-year timeframe:

- Dedicated 9th Avenue service from the downtown Government Center to Pensacola State College.
- Additional evening departures on weekdays.
- Bringing Saturday service to weekday service levels.
- Additional evening departures on Saturday.
- Bringing Sunday service to weekday service levels.
- Additional evening departures on Sunday.

- New services as called for in Escambia County's Optional Sector Plan.
- Santa Rosa County requests.

The subsequent ECAT TDP annual update completed in July 2012 reviewed the accomplishments for the first year of the 10-Year TDP Implementation Plan, noting management changes and revised service for routes to the Naval Air Station and Corry Station, Routes 57, 59 and 59A. The revised financial plan identifies the need to acquire nine heavy-duty buses and seven trolleys over the next four years.

The prior TDP included a vision and current and future needs as of 2012. It recommended one additional trip evening trip on several routes, increased frequencies on four high-performing routes, one new route with dedicated service on 9th Avenue between downtown Pensacola and the Cordova/medical complex, and bringing all system bus stops to meet ADA accessibility standards.

ECAT Comprehensive Operational Analysis (December 2014)

Based on the recommendations of the previous TDP, ECAT undertook a Comprehensive Operational Analysis (COA) in 2014 to review of its current route structure and system performance to ensure that the transit system:

- Continues to meet and support community needs.
- Provides an attractive option for as many people as possible.
- Operates in the most cost effective and efficient way.

Based on a market analysis and analysis of existing services and feedback from the public involvement process and ECAT front-line staff, a final set of short-term recommendations that focus on providing a better mix of origins and destinations with higher service frequency was proposed. Additionally, a restoration of service to Jackson Street and a realignment of routes serving Pensacola State College and Cordova Mall were recommended. Other short-term recommendations include coordinating service and passenger amenity improvements and improving passenger information.

The long-range recommendations focus on opportunities to grow ECAT ridership through strategic investments and partnerships, which include:

- Gradually expanding frequencies and spans of service by striving to have at least one-hour frequencies with no mid-day service interruptions on local routes.
- Providing at least five trips per day for longer distance routes, such as service to Century.
- Introducing rural community shuttles.
- Fostering a partnership between ECAT and WFRPC in jointly branding and marketing vanpools in Escambia County.

- Establishing partnerships with in other regions within and outside of Escambia County that currently have no transit service.
- Developing a meaningful route naming convention.

The COA provides several short-range solutions that are intended to be cost-neutral and provide a better mix of origins and destinations with higher service frequency. A restoration of service to Jackson Street and a realignment of routes serving Pensacola State College and Cordova Mall are included as short-range recommendations.

Escambia County Transportation Disadvantaged Service Plan, FY 2016 Annual Update (May 2015)

According to Section 427.011(1), F.S., TD persons are defined as “those persons who because of physical or mental disability, income status, or age are unable to transport themselves or to purchase transportation and are, therefore, dependent upon others to obtain access to health care, employment, shopping, social activities, or children who are handicapped or high-risk or at risk as defined in s. 411.202.” The Escambia County Transportation Disadvantaged Service Plan (TDSP) addresses the needs of older adults, persons with disabilities, or economically-disadvantaged people in Escambia County and reflects a careful review of various data, travel patterns, policies, and agency responsibilities and funding to define a five-year detailed implementation plan (which is updated annually) to help meet those needs. Currently, there are nine carriers participating in the Escambia County Coordinated System; six are operator/carriers paid by the CTC directly for the service that they deliver, and the three other are considered a coordination contracted agency. TDSP goals are categorized into service availability, efficiency, quality of service, necessary funding, and program accountability, and strategies are pursuant to adequate funding available.

- *Goal 1:* Ensure availability of transportation services to the transportation disadvantaged.
- *Goal 2:* Ensure cost-effective and efficient transportation services.
- *Goal 3:* Ensure quality of service provided to the transportation disadvantaged.
- *Goal 4:* Ensure necessary funding to support the program.
- *Goal 5:* Ensure program accountability.

The following are continued barriers to adequate coordination within the Escambia County area:

- Lack of commitment with scarce tax dollars.
- Perception that coordinated transportation is for “the poor.”
- Not enough funding to cover demand.
 - Securing local funding.
 - Specific issues directly related to funding sources.
- Reluctance of some medical providers to cooperate with transportation coordinator.
- Agencies that are receiving state and/or local dollars do not comply with Chapter 427, F.S.

- Maintaining compliance for maximum hours driven – CTC sends more than one driver on out-of-area trips to prevent driving over maximum 12 hours; therefore, causing shortage of in-county drivers for that period.

The TSDP outlines the development plan, service plan and quality assurance procedure for TD persons in Escambia County.

Escambia County Area Transit 2015 Public Workshops: Proposed Route Modifications for Route 41 & 42 (July 2015)

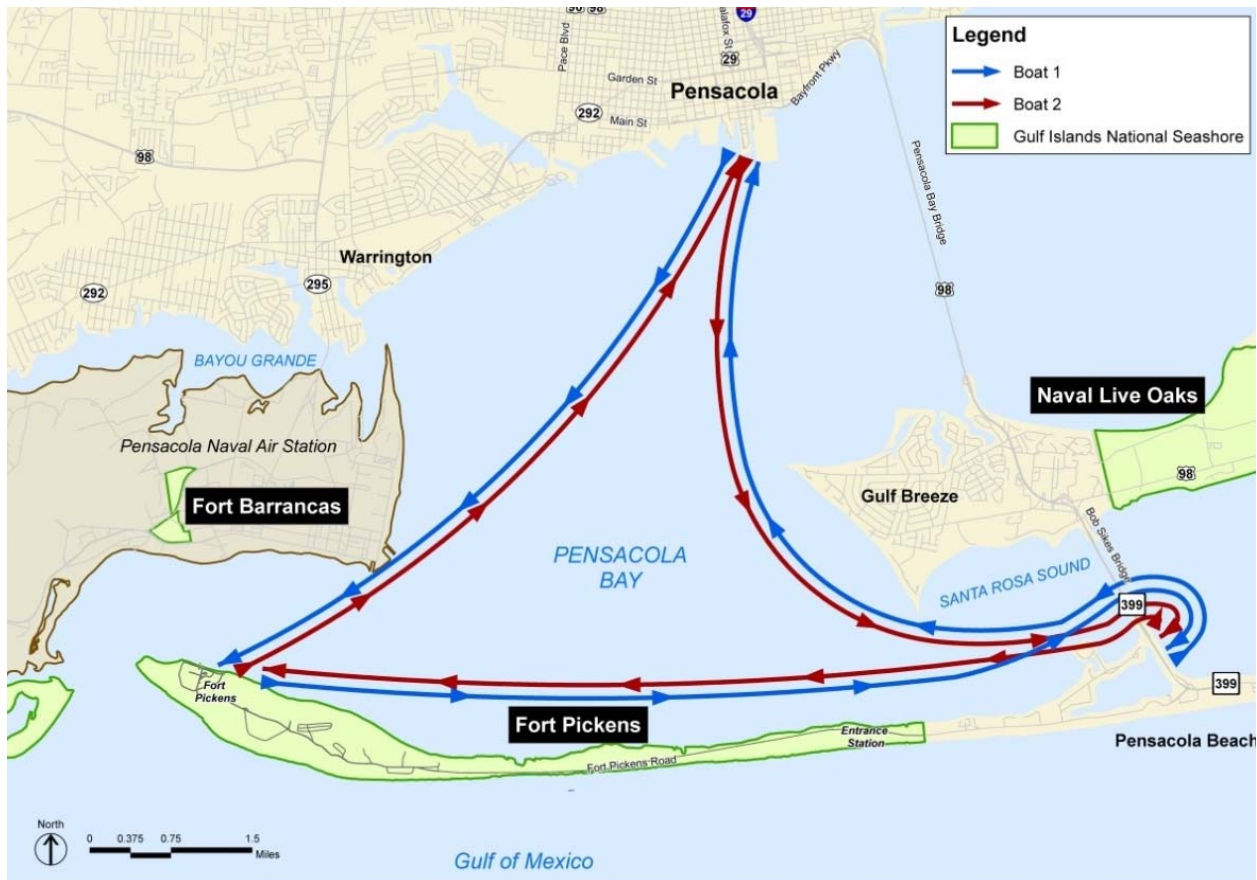
Escambia County presented to a public workshop the proposed route modifications for Routes 41 and 42 on July 20 and 21, 2015, based on the findings of the 2014 COA. The COA found that Route 41 had 36% fewer weekday passengers than the ECAT route average, had a large one-way loop that made the route cumbersome, and was missing a major ridership generator, Sacred Heart Hospital. To improve this, the report proposed realigning Route 41 and creating Route 31, as depicted in Figure 5-3. The new Route 31 would serve several major destinations not previously serviced. Similarly, Route 42 was split into two routes, 32 and 52, to eliminate the deviation to Rosa Parks Transit Center. A similar route to the one depicted in Figure 5-3 became effective on April 1, 2016.

The proposed changes to ECAT Routes 31 and 41 will eliminate excessive deviations to destinations and provide for more direct routes. The route changes took place on April 1, 2016.

Pensacola Bay Ferry System

Port Pensacola recently received approximately \$1.8 million in Federal Lands Access Program funding to construct the Ferry landing improvements at Commendancia Slip. It is envisioned that the a floating dock to support ferry access will help visitors access the Fort Pickens area of Gulf Islands National Seashore (see Figure 5-4). It is anticipated that the project, if built, will serve 60,000 annual passengers. The City has also applied for another grant that proposes a fixed ferry landing at the Quietwater Beach Boardwalk near the commercial core of Pensacola Beach at the junction of Pensacola Beach Boulevard and Fort Pickens Road. Two ferries have been funded, and procurement by the National Park Service is underway. Various agreements among the three locations are underway. The Pensacola Bay Ferry System is expected to be operational in the Spring 2017.

Figure 5-4: Future Pensacola Bay Ferry Routes



Source: Pensacola Bay Ferry Presentation for TPO

The construction of the ferry landing will provide the needed terminal for the Pensacola Bay Ferry to help visitors access the Fort Pickens area of Gulf Islands National Seashore and Pensacola Beach. A need will arise for coordinating transit services that connect to downtown Pensacola and Pensacola Beach.

Ladders of Opportunity Funding Initiative

Escambia County has requested federal assistance for a new transit center in a new location that would combine fixed-route and paratransit services in a state-of-the-art facility to better serve the needs of the community. The current transit facility for ECAT is not large enough to accommodate all fixed-route and paratransit vehicles and is still in need of repair from the flood damage that occurred in April 2014.

The construction of a new ECAT transit center with additional capacity to accommodate all fixed-route and paratransit vehicles would better serve the needs of the community.

Additionally, the current facility lacks space for employee training and has inadequate passenger amenities. Also included in the grant request are solar powered bus shelters.

Main Street Corridor Management Plan (August 2014)

The purpose of the Main Street Corridor Management Plan is to identify operational and access management improvements and priorities needed to support all modes of transportation, including roadway capacity, public transit, and bicycle and pedestrian movements along Main Street in Pensacola. The study segment is along Main Street from Barrancas Avenue to Clubbs Street, approximately 0.8 miles long. In addition to an assessment of existing traffic conditions, land use, crash types, and future traffic conditions, a set of four Complete Streets concepts was developed and analyzed as part of an effort to revitalize the corridor to attract more businesses and individual users, encourage other modes of transportation in addition to personal vehicles, and increase the aesthetic appeal of the corridor. If implemented, it is anticipated that the improved walkability of Main Street will improve transit provisions in the city. The four concepts for modifying Main Street to make it more of a Complete Street include:

- *Concept 1:* Constructing a shared-use path on one side of Main Street.
- *Concept 2:* Constructing sidewalks on both sides of Main Street.
- *Concept 3:* Constructing buffered bike lanes on both sides of Main Street.
- *Concept 4:* Implementation of a continuous center turn lane.

If implemented, the CMP will improve the overall walkability of Main Street, thereby improving transit provisions in this area.

Situation Appraisal

Requirements for a 10-year TDP in Florida include the need for a situation appraisal of the environment in which the transit agency operates. The purpose of this appraisal is to help develop an understanding of the transit operating environment in Escambia County in the context of the following elements:

- Socioeconomic trends
- Travel behavior
- Land use
- Public involvement
- Organizational attributes
- Technology
- Regional transit issues

The assessment and resulting implications are drawn from the following sources:

- Results of technical evaluation performed as part of the *Connections 2026* TDP planning process.
- Review of relevant plans, studies, and programs prepared at all levels of government.
- Outcomes of public outreach activities.

Issues, trends, and implications are summarized for each of the major elements in the remainder of this section.

Socioeconomic Trends

To better assess the impact of the growth in population on public transportation needs, it is important to understand the trends and markets that could be impacted or may benefit from public transportation services. Key findings from an assessment of socioeconomic trends are summarized as follows:

- The census-designated places north of Pensacola, Ferry Pass and Gonzalez, are the fastest-growing areas in Escambia County.
- Minority populations are concentrated in the urban core of Pensacola and in Century.
- The percentage of older adults is expected to increase from 16.5% in 2015 to 21% in 2025.
- The 2000–2014 ACS revealed that the majority of transit riders were young adults ages 20–24, totaling 37% of riders, primarily students at UWF and Pensacola State College. The second largest group of transit riders was adults age 25–44.
- Poverty status for individuals has seen a gradual increase from 15.4% in 2000 to 17.1% in 2014.
- Concentrations of individuals below the poverty line are dispersed throughout the Pensacola area.
- The areas with the highest population density are within the Pensacola area.
- The US Department of Defense is the largest economic generator in the Greater Pensacola area, with airfields including the Naval Air Station Pensacola, Saufley Field, Corry Station, and Whiting Field.
- More than 10,000 people are employed in healthcare in and around Escambia County, including Baptist Health Care and Sacred Heart Health System, West Florida Healthcare, and the Naval Hospital Pensacola.
- The Navy Federal Credit Union employs the third highest number of private sector jobs in the county and is expected to increase its labor force by 5,000 new jobs by 2026, for a total employee base of 10,000.
- Areas with highest employment density include Ellyson Industrial Park, the Naval Base in Myrtle Grove, downtown Pensacola, Baptist Hospital and the Cordova Mall.
- In 2014, only 0.6% of commuters traveled to work using public transportation in Escambia County.
- The majority of commuters depart between 6:00 and 7:00 AM.
- Transit riders who work in service occupations, and sales and office occupations make up the majority of transit riders, consisting of about 37.4% and 37.9% of transit riders, respectively.

- Pensacola International Airport is owned and operated by the City of Pensacola. It currently has two runways for six major airlines that transport people and cargo in and out of the region, including UPS. Uber has reached an interim agreement with the airport that allows Uber drivers to use common-use airport roadways for ingress and egress to the airport.

Implications – *Transit service could incrementally expand as population and employment increases. Growing traditional rider markets such as the elders may indicate that the county is becoming more transit-supportive. Escambia County should continue to maintain its current services by targeting traditional markets and areas with high density, especially since poverty rates and older adult populations are projected to increase.*

ECAT should continue efforts to increase its share of discretionary riders, particularly young adults and those who work in the service, sales, and office occupations. Occupations such as those in the service industry that may work outside of traditional office hours may require extended service hours to meet the demands of their work schedule.

ECAT already captures major Transit Orientation Index (TOI) and Density Threshold Assessment (DTA) areas in the Pensacola area; however, service needs to expand to capture markets needing to access important trip attractors such as the Navy Federal Credit Union and the Ellyson Industrial Park. Although the overall county population is not projected to increase dramatically, growing areas such as the Census Designated Places (CDP) north of Pensacola, including Ferry Pass and Gonzalez, should also be given consideration when expanding transit services.

Travel Behavior

- Major trip attractors in Escambia County include military installations, colleges and universities, major retail establishments, and hospitals and clinics.
- Based on 2014 ACS data, Escambia County had 134,469 employed residents, of which 90% lived and worked within the county, indicating a high demand for local employment-based trips.
- The tourism industry in Escambia County is estimated to employ more than 14,000 employees in the accommodation and food services industry and nearly 2,400 employees in the arts, entertainment, and recreation industry.
- Downtown Pensacola, Gulf Breeze, Pensacola Beach, and Perdido Key attract a substantial proportion of the 14 million visitors that visit Northwest Florida annually.
- Congested roads include US 90, US 90A, Blue Angels Parkway, Davis Highway, Gulf Beach Highway, Navy Boulevard, Pine Forest Road and Main Street, and Saufley Field Road.

Implications – *ECAT already serves many major trip generators and attractors, but could consider increasing frequencies to these locations, such as military installations, universities, and major medical facilities. As the county gradually grows, Escambia County should continue to modify its services to capture new riders and new transit markets, such as “choice” riders. Express bus with Transit Signal*

Priority (TSP) at key intersections during peak travel hours on congested roadways could decrease travel times for commuters, making transit more attractive, particularly when combined with other transportation demand management (TDM) strategies such as guaranteed ride home programs, vanpooling, and park-and-ride facilities. A more robust transit service with higher frequencies and later hours of service could also make transit for visitors more attractive.

Regional Transit Issues

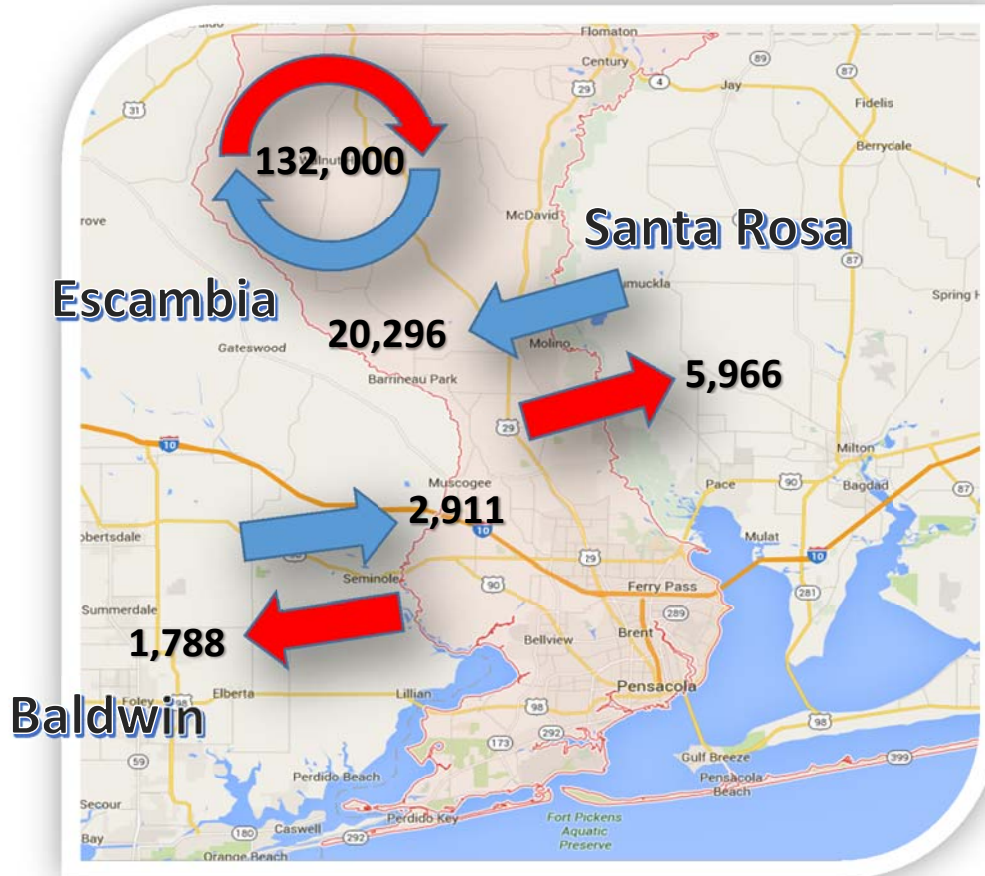
- A total of 5.8% of employed residents commuted to other counties, the majority working in Santa Rosa County and some working in both Baldwin and Okaloosa counties.
- The Florida–Alabama TPO’s Directions 2040 LRTP Needs Plan includes several roadway expansion and intersection improvement projects, nine park-and-ride lots, and express transit routes that run along I-10, I-110, US 98, SR 289, and US 90. These routes connect Pensacola to Milton, west Escambia County, Lillian, Navarre, Gulf Breeze and Fort Walton Beach.
- The 2040 LRTP Cost Feasible Plan reduces the number of funded projects to include express routes connecting West Escambia County, and Milton to Downtown Pensacola. There are no park-and-ride lots included in the Cost Feasible Plan.
- A substantial number of commuters from outside of Escambia County originate from Santa Rosa County, as illustrated in Figure 5-5. Representatives from Santa Rosa participating in the *Connections 2026* planning process have also expressed the need for regional transit connections to Santa Rosa County.
- Amtrak ceased service to Escambia County in 2005. The study on returning passenger rail to the Panhandle region highlights the continuing need for transit to serve regional markets that extend to major cities like New Orleans, Mobile and Orlando.
- The Pensacola Greyhound Terminal (see Figure 5-6) is within walking distance of ECAT Routes 50 and 60 but lacks safe pedestrian facilities between the terminal and the bus stops.

Figure 5-5: Pensacola Greyhound Terminal



Image source: Google Streetview

Figure 5-6: Regional Commuting Trips



Implications – With more enhanced service to travel between neighboring counties such as Santa Rosa as well as Baldwin County, Alabama, and opportunities to connect with other transit systems regionally, public transit may provide a more efficient travel option to riders in “captive” markets (older adult, low-income, and minority populations without access to an automobile or who are unable to drive) and more attractive for “choice” riders. Park-and-ride facilities are an effective way to connect to regional transit between Santa Rosa, Baldwin, and Okaloosa counties, if available. Better connections to the future Amtrak station and the current Greyhound terminal in Pensacola could also further enhance regional travel. As the Pensacola–Ferry Pass–Brent Metropolitan Statistical Area (MSA) expands to neighboring counties, ECAT should engage in regional discussions about regional travel options. Express bus transit on major arterials could further enhance regional travel objectives by providing faster transportation options.

Land Use

- Within Pensacola, a substantial concentration of commercial land use that is surrounded by medium-density residential use is zoned along the corridors of US 29, US 98, E Heinberg Street, SR 291, and N 9th Avenue.
- The traditional street grid of Pensacola support enhance walkability and transit.
- Low-density residential is located primarily in the eastern side of Pensacola, especially in the area surrounding the Bayou Texar.
- Escambia County has adopted an innovative Optional Sector Plan that is multimodal-oriented.
- The northern section of the county is largely zoned for agricultural land use, with the exception of the industrial areas in Century and dispersed areas for conservation and recreation.
- The southern areas surrounding the historic and preservation ones of downtown Pensacola are zoned for redevelopment.
- Small pockets of high-density residential within Pensacola are located near Morris Court Park, west of the Baptist Hospital, the eastern perimeter of the Pensacola airport, areas surrounding the Cordova Mall, and the area surrounding Park Place Apartments.
- In Escambia County, the major commercial corridors are along US 90, SR 297, I-10, US 90A, and US 29.
- The area surrounding Pensacola is surrounded by mixed-use urban; surrounding these areas is largely mixed-use suburban.
- The eastern side of Century is primarily zoned industrial.

Implications – Land use and transportation, when planned for concurrently, lead to more efficient land use and transportation networks. If the Escambia County FLUM is implemented in combination with more stringent land development regulations that support an interconnected multimodal transportation system, ECAT has a better opportunity to develop services that make transit a more viable option for traditional and choice riders.

The Pensacola Comprehensive Plan designates special mixed-use districts with parking reductions like the TCEA, which may help to create a more transit-supportive environment for ECAT. However, the suburban development outside of the densely-populated urban core and sparsely-located high-density residential within Pensacola will make it difficult to efficiently operate transit. Because of these challenges, it is important for ECAT to continue to coordinate with local government agencies and partners by communicating the need for policies and land development regulations that promote a multimodal environment.

Public Involvement

General conclusions drawn from public involvement efforts conducted for the TDP as well as other efforts include the following:

- **More service frequency/hours** – Public feedback emphasized the need for more frequency as a high priority. Implementing later hours at night was also a high priority with users. When asked during the ECAT on-board survey, respondents were least satisfied with how often the buses run and lack of late and weekend service.
- **Expand service coverage** – Public outreach process participants expressed a desire for ECAT to expand its service coverage and reach new areas of Escambia County. Need for service coverage include the commercial corridor on Nine Mile Road, the beaches and tourism areas, a route linking Downtown to Uptown, and the airport via N Blue Angel Parkway. Ellyson Industrial Park, Navy Federal Credit Union, Navy Air Station in Pensacola, PACE Center for Girls Escambia-Santa Rosa, T&W Flea Market on T Street (Friday–Sunday), Perdido Key, West Pensacola and Pensacola State College were indicated as destinations needing service during the public outreach efforts.
- **Regional connectivity** – Feedback emphasized a need to connect the rural areas of Escambia County and its neighboring counties to the east and west. This includes connecting Pensacola with North Escambia County (a flex-type service), Ensley and Cantonment, Milton, Pace, Pea Ridge, and Santa Rosa County in general. As previously shown, most commuters who arriving to Escambia County travel from Santa Rosa County.



Implications – Several potential improvements were identified across all public involvement efforts, including more frequent service, adding weekend and night service, and servicing new local and regional areas. Important to Escambia County will be the need to balance the allocation of limited resources if and when these improvements are implemented. One of the major strategic planning considerations for Escambia County is whether to enhance public transportation by implementing new local and regional connections such as the Navy Federal Credit Union, Ellyson Industrial Park, Santa Rosa County, and park-and-ride lots or to maintain the existing deviated fixed-route system and improve service delivery.

Organizational Attributes

ECAT services operate as part of the Public Works Department for the Escambia BCC. First Transit, Inc., a private-for-profit company, is the management company contracted to manage and operate ECAT. The Escambia County MTAC advises the Board of County Commissioners on mass transit issues in Escambia

County to help facilitate a community vision for mass transit and to assist the Board in developing and maintaining effective and efficient mass transit systems in Escambia County.

Implications – While continuing the current organizational structure as part of a County department, ECAT should continue to explore opportunities in its effort to increase service and manage efficiencies. Periodic efforts such as the recently-completed COA or an internal assessment will identify whether any operational changes could enhance ECAT’s efficiency.

Technology

ECAT has continued to implement new technology components to enhance the overall transit experience for its patrons. In addition to various in-vehicle technologies such as Automatic Passenger Counters (APCs) and GPS, ECAT uses a GPS Tracker where users can track buses live from their website (depicted in Figure 5-7). Furthermore, users can track the buses using the ECAT Tracker App. ECAT also has on-board wireless, automatic vehicle location, automated voice announcements, and automatic passenger counts.

Implications – As ECAT’s ridership has grown, it has implemented technologies such as APCs, voice announcement systems, and other technology upgrades to enhance its quality of service. These technologies assist in conveying important traveler information as well as expectations.

Figure 5-7: ECAT Tracker Website Interface

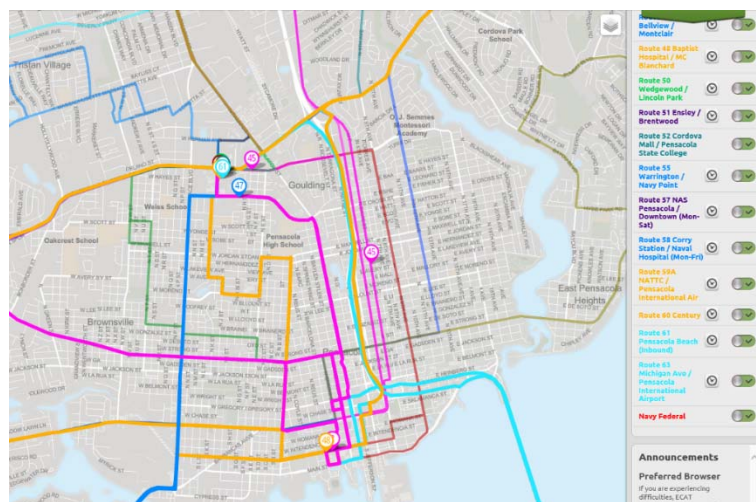


Image source: <https://ecat.doublemap.com/map/>

Section 6: Goals and Objectives

Goals and objectives are an integral part of any transportation plan because they provide the policy direction to achieve the community's vision. The goals and objectives presented in this section were prepared based on the review and assessment of existing conditions, feedback received during the public involvement process, and the review of local transportation planning documents. This section presents the draft goals and objectives to support the community's vision for transit services over the next 10 years as documented in the *Connections 2026 TDP*.

ECAT Vision

Escambia County Area Transit will be the preferred transportation resource for citizens and visitors in Escambia and surrounding counties. The system will provide a cost-effective and exceptional transit choice that enhances mobility, provides community accessibility, encourages economic expansion, and embraces environmental sensitivity.

ECAT Mission Statement

Escambia County shall operate a safe, reliable public transportation system that effectively and efficiently accommodates existing / future mobility needs, stimulates economic development and strengthens communities as identified through on-going outreach to Escambia County's residents, visitors and businesses.

ECAT Goals and Objectives

Based on the situation appraisal, the draft goals and objectives recommended for the 10-year planning horizon are presented in Table 6-1.

Table 6-1: ECAT Goals, Objectives and Strategies

Goal 1	<i>Expand service delivery for existing and potential customers to meet demand for transit services in Escambia County.</i>
Objective 1.1	Develop a service performance monitoring and evaluation program for all existing and expanded services.
Strategy 1.1.1	Continue to monitor performance measures including Passengers per Revenue Hour, Passengers per Revenue Mile, Farebox Recovery, Cost per Passenger Trip, and Subsidy per Passenger Trip.
Strategy 1.1.2	Develop standards to determine of strong, average or poor performing routes.
Strategy 1.1.3	Continue to collect data on, service performance measures and service quality.
Objective 1.2	Pursue those improvements that are the most efficient in terms of garnering ridership and cost-effective to implement.
Strategy 1.2.1	Pursue improvements within existing service hour resources.
Strategy 1.2.2	Conduct a periodic Comprehensive Operations Analysis to support efficient improvements.
Objective 1.3	Enhance connectivity and transfer opportunities.
Strategy 1.3.1	Continuously monitor timed transfers at Rosa Parks, Pensacola State College and the Government Center Transfer Stations.
Strategy 1.3.2	Pursue timed transfers at on-street locations where routes intersect.
Objective 1.4	Enhance service reliability and on-time performance to secure customer loyalty.
Strategy 1.4.1	Compile customer complaints to determine if specific routes have chronic on-time performance problems.
Strategy 1.4.2	Conduct running time checks on routes with on-time performance problems.
Strategy 1.4.3	Conduct periodic field checks to ensure if routes are running within their allocated running times.
Objective 1.5	Establish guidelines for increasing frequency on high-demand routes to improve service capacity.
Strategy 1.5.1	Establish standards for weekday, Saturday and Sunday frequencies.
Strategy 1.5.2	Establish standards for peak versus off-peak frequency improvements.
Strategy 1.5.3	Focus frequency improvements on strong performing routes only.
Objective 1.6	Design fixed-routes to optimize direct routing and minimize customer travel time.
Strategy 1.6.1	As part of TDP Major Updates, analyze new routes in the T-BEST model for opportunities to create more direct routing and service to major activity centers.
Objective 1.7	Regularly evaluate routes for extending weekday hours of service based on customer demand and community support.
Strategy 1.7.1	Focus evening expansion on strong and average performing routes to better suit alternative employment and student schedules.
Objective 1.8	Regularly evaluate routes for expanding service on Saturday and Sunday.
Strategy 1.8.1	As financial resources become available in the future, improve routes on weekends based on service demand needs and weekday route performance.
Objective 1.9	Focus all new services on connecting critical activity centers and employment centers within Escambia County.
Strategy 1.9.1	Identify major activity centers such as NAS Pensacola and associated facilities, Downtown Pensacola, Cordova/Medical Complex, major medical facilities, and colleges and universities.

Goal 2	<i>Maintain and expand adequate capital infrastructure to ensure vehicles, facilities, customer amenities and bus stops achieve the highest standard of accessibility and comfort.</i>
Objective 2.1	Develop and maintain a comprehensive Capital Improvement Program (CIP).
Strategy 2.1.1	Utilize this major TDP update as a basis for developing and maintaining a Capital Improvement Program (CIP).
Objective 2.2	Continue to replace fleet in an orderly manner in accordance with federal interest standards.
Strategy 2.2.1	Develop a vehicle replacement plan based on published federal interest standards for vehicle age and/or mileage.
Objective 2.3	Expand bus fleet as needed for future service improvements.
Strategy 2.3.1	Use this TDP update as a basis for expansion fleet needs.
Objective 2.4	Create a passenger amenities program to place shelters and amenities throughout the service area.
Strategy 2.4.1	Program Section 5307 funds for passenger amenity improvements.
Strategy 2.4.2	Implement passenger amenities when public right-of-way is available.
Strategy 2.4.3	Bring all bus stops into compliance with the Americans with Disabilities Act (ADA).
Strategy 2.4.4	Procure firm capable of design, engineering, construction and permitting to bring bus stops into ADA compliance.
Objective 2.6	Pursue technology improvements to enhance operational efficiency, effectiveness and customer satisfaction.
Strategy 2.6.1	Procure and install Automatic Passenger Counters (APCs) on all ECAT vehicles in revenues service
Objective 2.7	Coordinate with municipalities, business interests, community associations, etc. to leverage resources for capital improvements.
Strategy 2.7.1	Coordinate with the City of Pensacola on the City's own program to install benches and shelters.
Strategy 2.7.2	Coordinate with private property owners as part of their own ADA requirements for accessible pathways to make ADA bus stop accessibility improvements when right-of-way is insufficient
Goal 3	<i>Develop a comprehensive marketing, communications and media relations program to effectively promote transit's image, awareness, public embrace and information materials.</i>
Objective 3.1	Update/maintain a comprehensive marketing program to market services to existing and potential customer bases, including employees, employers, and traditional transit markets, persons with disabilities, military personnel, tourists, primary school students and college students.
Strategy 3.1.2	Utilize performance evaluation and monitoring program and action plans for associated improvements to communicate service improvements with customers and potential customers
Objective 3.2	Continue to evaluate and enhance marketing material to provide printed and web-based transit information that is customer-friendly and attractive.
Strategy 3.2.2	Enhance navigation of ECAT website and ECAT Tracker App to be more interactive and customer friendly.
Strategy 3.2.3	Enhance communications between ECAT and its riders using social media.
Strategy 3.4.1	Proactively seek press coverage for ECAT's initiatives and improvements.
Objective 3.5	Develop a community relations program for all partners participating in the funding public transportation services.
Strategy 3.5.2	Conduct speaking engagements with a variety of civic and government groups around the county.
Strategy 3.5.3	Conduct and/or participate in transportation days at critical activity centers.
Objective 3.6	Enhance the image of transit to fulfill maximum community embrace.
Strategy 3.6.1	Hire a marketing and communications firm to assist ECAT and Escambia County with all marketing objectives.

Goal 4	<i>Evaluate and participate in community values and initiatives as they relate to future plans.</i>
Objective 4.1	Support collaborative land and use and transportation planning efforts that ensure communities can develop in an efficient and sustainable way.
Strategy 4.1.1	Coordinate with FDOT, County, and municipal engineers to incorporate transit amenities and ADA stop improvements on any road construction projects.
Objective 4.2	Coordinate local and regional multimodal plans to ensure that transit routes are a consideration in the prioritization process for projects.
Strategy 4.2.1	Coordinate with the Florida-Alabama TPO in multimodal planning activities to ensure that transit has a place in the overall priority mix for improvements.
Strategy 4.2.2	Coordinate with county and municipal planners to develop comprehensive planning and zoning codes that encourage transit-oriented development.
Strategy 4.2.3	Coordinate with County and municipal planners to incorporate transit improvements to new development along ECAT's current or future routes.
Objective 4.4	Support Escambia County's Optional Sector Plan process to encourage cohesive and sustainable development patterns within central Escambia County, emphasizing urban form and the protection of regional resources and facilities
Strategy 4.4.1	Coordinate with Escambia County Growth Management to assess transit needs as market forces begin to develop in the Optional Sector.
Objective 4.5	Support the creation of a highly interconnected, multi-modal transportation system that efficiently links housing to employment and retail opportunities.
Strategy 4.5.1	Utilize Performance Monitoring and Evaluation Program with associated Action Plans to focus improvements around this objective.
Strategy 4.5.1	Utilize Performance Monitoring and Evaluation Program to provide indicators for mobility goals within the City.
Objective 4.6	Support urban redevelopment goals within the Pensacola Urban Redevelopment Area Transportation Concurrency Exception Area, including availability of public transportation as a strategy to promote redevelopment and reduce congestion.
Strategy 4.6.1	Encourage the City of Pensacola to resume participation in funding the transit system in order to support its own goals in the comprehensive plan.
Objective 4.7	Proactively partner with the business community and the regional workforce development board to continuously develop and refine services to meet their needs
Strategy 4.7.1	When major employers request service, approach them for partial funding of transit services.
Goal 5	<i>Maximize safety and security for all transit services and facilities</i>
Objective 5.1	Maintain a comprehensive System Safety Program Plan (SSPP).
Strategy 5.1.1	Update the SSPP in accordance with FDOT requirements.
Objective 5.2	Maintain and implement safety and security systems throughout facilities, fleet and public stops and stations.
Strategy 5.2.1	Identify safety and security issues at Rosa Parks, Pensacola State College and the Downtown Center Transfer stations.
Strategy 5.2.2	Communicate safety concerns related to lighting and traffic conflicts at or near bus stops with the appropriate maintaining jurisdiction.

Goal 6	<i>Ensure prudent public stewardship of financial resources and secure additional funding for system maintenance and improvements.</i>
Objective 6.1	Maintain an equitable fare policy and establish a farebox recovery standard.
Strategy 6.1.1	Conduct a fare analysis including actual revenue yields from the various ECAT fare media. Maintain equity of yields for all media.
Strategy 6.1.2	Utilize modified peer mean for farebox recovery as benchmark for ECAT performance at the system and route level.
Objective 6.2:	Develop a long-range financial plan that maximizes grant-funding sources for TDP strategic improvements and long-range transportation improvements.
Strategy 6.2.1	Identify potential dedicated funding sources for transit to implement future improvements.
Strategy 6.2.2	Coordinate with County Administration to ensure that revenues are available to keep pace with normal inflationary factors.
Strategy 6.2.3	Coordinate closely with County Administration and the Board of County Commissioners when additional local funds can leverage State and Federal funds.
Objective 6.3	Ensure that TDP improvements are included in the Long Range Transportation Plan efforts.
Strategy 6.3.1	Coordinate with the Florida-Alabama TPO to ensure that future transit needs are considered as part of the L RTP Needs Plan and Cost Feasible Plan.
Objective 6.4	Seek partnerships with colleges and universities to offer unlimited access to students through transportation fees.
Strategy 6.4.1	As statutes allow, coordinate transit improvements through student transportation fees with colleges and universities.
Strategy 6.4.2	Maintain program whereby colleges and universities have input into the services provided to their respective campuses.
Objective 6.5	Establish a legislative funding priority program to seek state and federal funding partnerships.
Strategy 6.5.1	Coordinate with County Administration, the Board of County Commissioners, the Escambia County legislative delegation, and the Florida Public Transportation Association to ensure major initiatives are considered when transportation legislation is under consideration.
Objective 6.6	Approach employers and businesses who desire bus service to establish a partnership to partially fund service.
Strategy 6.6.1	Establish formulas for determining the percentage of participation required for the Board of County Commissioners to initiate service
Goal 7	<i>Pursue regional transportation needs with surrounding counties and the overall Pensacola Urbanized Area.</i>
Objective 7.1	Proactively seek partnerships with Lillian and Santa Rosa County government, business and community interests to develop transit services linking residents of the Pensacola Urbanized Area.
Strategy 7.1.1	As regional local governments match aspirations for public transportation with local funds to operate service, coordinate transit linkages.
Strategy 7.1.2	Proactively participate in future discussions concerning regional transit service between Escambia, Santa Rosa, Baldwin (AL), and Okaloosa Counties.

Section 7: Transit Demand Analysis

This section summarizes the transit demand analysis conducted as part of the *Connections 2026* TDP. Three assessment techniques were used to assess demand for transit services in Escambia County:

- Discretionary Market Assessment
- Traditional Market Assessment
- Forecast Ridership Modeling and Analysis

The summary of the assessment techniques are presented and followed by the results of each analysis. When combined with the situation appraisal, performance reviews, and public involvement feedback, the demand assessment yields the building blocks for evaluation the transit needs for the next 10 years.

Market Assessment

The baseline conditions assessment for developing the *Connections 2026* TDP includes an evaluation from two perspectives—the discretionary market and the traditional market, the two predominant rider markets for bus transit service. Analytical tools for conducting each market analysis include a Density Threshold Assessment (DTA) and a Transit Orientation Index (TOI). These tools assist in determining whether existing transit routes are serving areas of the county considered to be transit-supportive for the corresponding transit market. The transit markets and the corresponding market assessment tool used to measure each are described below.

Traditional Transit Market Assessment

The traditional transit market refers to population segments that historically have a higher propensity to use transit or depend on transit for their transportation needs. For some individuals, their ability to drive is greatly diminished with age and they must rely on others for their transportation needs. Likewise, younger persons not yet of driving age but who need to travel to school, employment, or for leisure may rely more on public transportation until they reach driving age. For lower-income households, transportation costs are particularly burdensome, as a greater proportion of income is used for transportation-related expenses than it is for higher-income households. Households with restricted income, particularly those with no private vehicle, are more likely to rely on public transportation for travel. Therefore, traditional transit users include older adults, youth, and households that are low-income and/or have zero vehicles.

A TOI assists in identifying areas of the county in which a traditional transit market exists. To create the TOI, five-year demographic data estimates from the 2014 ACS were analyzed at the census block group level (the most detailed level of data available from ACS) for the following demographic and economic variables:

- Population age 65 and over (older adults)
- Population under age 15 (youth)

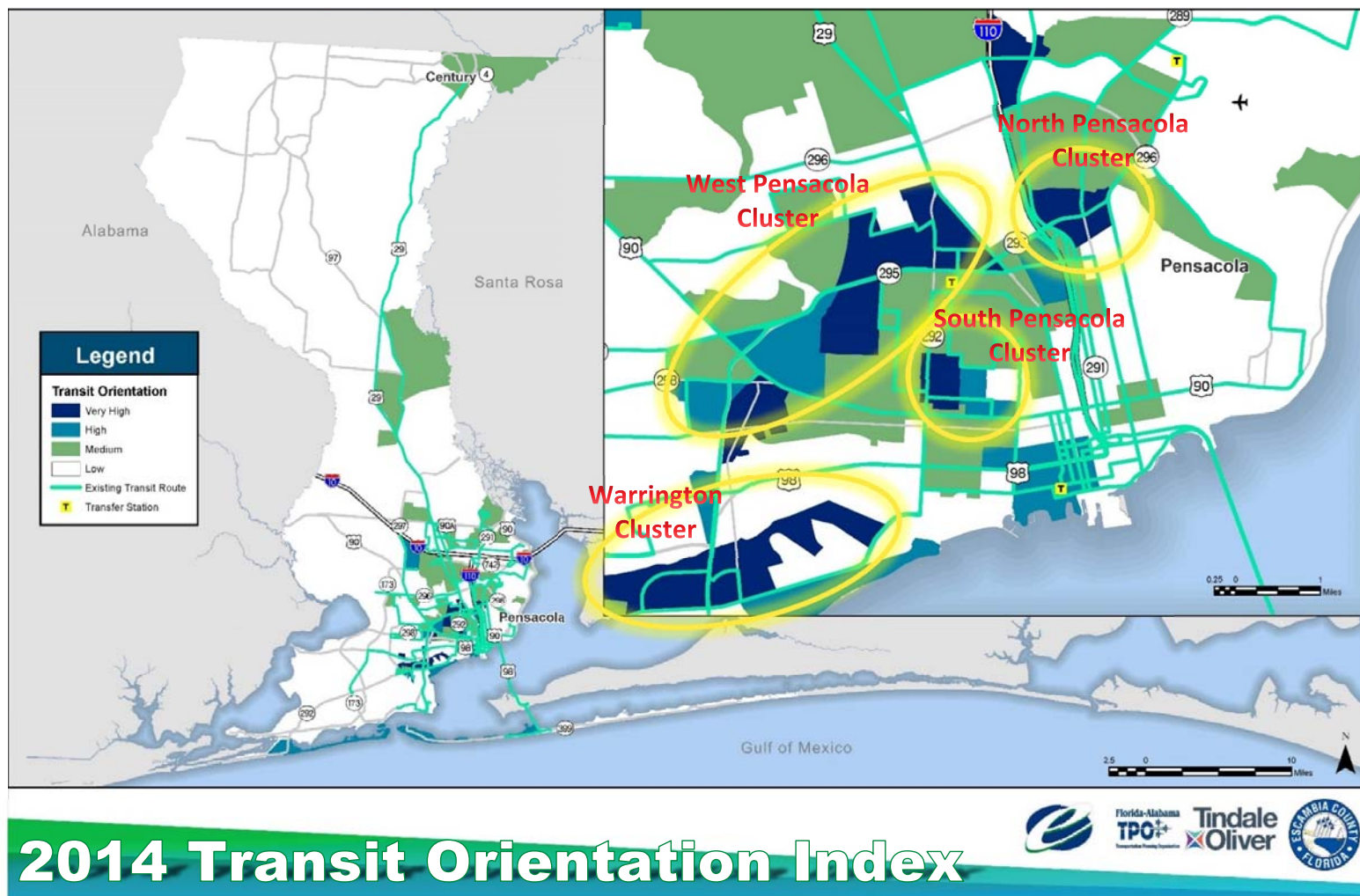
- Population living below the poverty level (\$25,000 or less annual income for a 4-person household)
- Households with no vehicles available (zero-vehicle households)

The ACS data layers were overlaid to develop a composite ranking for each census block group of “Very High,” “High,” “Medium,” and “Low,” with respect to the level of transit orientation. The areas that ranked “Very High” reflect a very high transit orientation, i.e., a high proportion of transit-dependent populations, and those ranked “Low” indicate much lower proportions of transit-dependent populations.

Map 7-1 illustrates the 2014 TOI prepared for Escambia County, reflecting areas with varying traditional market potential. Within Escambia County, four clusters of census block groups stand out as having “Very High” and “High” transit orientation, including:

- *North Pensacola Cluster*— In northwest Pensacola, composed of one block group with “Very High” transit orientation and another with “High” transit orientation. The “Very High” transit orientation census block group reflects a high prevalence of low-income and zero-vehicle households. It is served by ECAT routes 41, 42, 45, and 59A.
- *South Pensacola Cluster* – Relatively small cluster in the southern section of Pensacola, adjacent to downtown. It is composed of one census block group with “Very High” transit orientation and another with “High” transit orientation, each of which is characterized with a high prevalence of below-poverty-level and zero-vehicle households. However, none of the census block groups shows a high prevalence of youth. It is served by ECAT routes 44, 48, and 55.
- *West Pensacola Cluster* – In West Pensacola along State Road 295/W Fairfield Drive and New Warrington Road. It is composed of four census block groups with “Very High” transit orientation and two with “High” transit orientation. Three of the “Very High” transit orientation census block groups are characterized by a prevalence of below-poverty-level and zero-vehicle households, and the block group south of SR 295 shows a prevalence of elderly. The block group north of SR 295 is also characterized by a high prevalence of youth. The cluster is served by ECAT routes 1, 2, 44, 47, 50, 51 59A, 60, and 61.
- *Warrington Cluster* – Includes three block groups along the SR 292/Gulf Beach Highway corridor and a “High” transit orientation block group along the shoreline. The two most western blocks are characterized by a high prevalence of youth, and the eastern block is characterized by a high prevalence of below-poverty-level and zero-vehicle households. The southern block group along the shore line is characterized by a high prevalence of elderly. The cluster is served by ECAT routes 55, 59X, 59A, and 64.

Map 7-1: 2014 Transit Orientation Index



A close examination of these four transit orientation clusters indicates that, within and immediately surrounding them, the most prevalent factors characterizing census block groups with “Very High” and “High” transit orientations are zero-vehicle households.

Discretionary Transit Market Assessment

A discretionary transit market refers to potential riders living or working in higher-density areas of the county who may choose to use transit as a commuting or transportation alternative. The Millennial (“Gen Y”) generation is another relatively new transit market of choice riders, albeit greatly influential, since Millennials are now the largest generation, representing approximately one-third of the total U.S. population, according to the U.S. Executive Office Council of Economic Advisors. Shaped by technology and the Internet, the preferences of Millennials are very different than preceding generations, particularly related to living and transportation. In its *America in 2013* survey, the Urban Land Institute reports that Millennials are twice as likely to use public transportation over other generations and largely prefer to live in a larger urban areas with transportation options to driving, differing considerably from its more auto-centric and suburban living Gen X predecessors.

A DTA was conducted based on industry-standard relationships between transit levels and dwelling unit/employment densities to identify the areas of Escambia County that are currently experiencing or projected to experience transit-supportive residential and employee density levels in the future. Both existing (2017) and future (2026) dwelling unit and employment data obtained from the NWFRPM were used to conduct the DTA.

Three density thresholds were developed to indicate whether an area contains sufficient density to sustain some level of fixed-route transit operations:

- *Low* – reflects minimum dwelling unit or employment densities to consider basic fixed-route transit services (i.e., local fixed-route bus service).
- *High* – reflects increased dwelling unit or employment densities that may be able to support higher levels of transit investment (i.e., increased frequencies, express bus) than areas meeting only the minimum density threshold.
- *Very High* – reflects very high dwelling unit or employment densities that may be able to support higher levels of transit investment (i.e., premium transit services, etc.) than areas meeting the minimum or high density thresholds.

Table 7-1 presents the dwelling unit and employment density thresholds (in terms of TAZ) associated with each threshold of transit investment.

Table 7-1: Transit Service Density Thresholds

Level of Transit Investment	Dwelling Unit Density Threshold ¹	Employment Density Threshold ²
Minimum Investment	4.5–5 dwelling units/acre	4 employees/acre
High Investment	6–7 dwelling units/acre	5–6 employees/acre
Very High Investment	≥8 dwelling units/acre	≥7 employees/acre
¹ TRB, National Research Council, TCRP Report 16, Volume 1 (1996), <i>Transit and Land Use Form</i> , November 2002, MTC Resolution 3434 TOD Policy for Regional Transit Expansion Projects.		
² Based on a review of research on the relationship between transit technology and employment densities.		

Maps 7-2 and 7-3 illustrate the results of 2017 and 2026 DTA analyses conducted for Escambia County, identifying areas that support different levels of transit investment based existing and projected dwelling unit and employment densities. These maps also illustrate the existing ECAT transit route networks to gauge how well the current transit networks cover the areas of Escambia County that are considered supportive of at least a minimum level of transit investment.

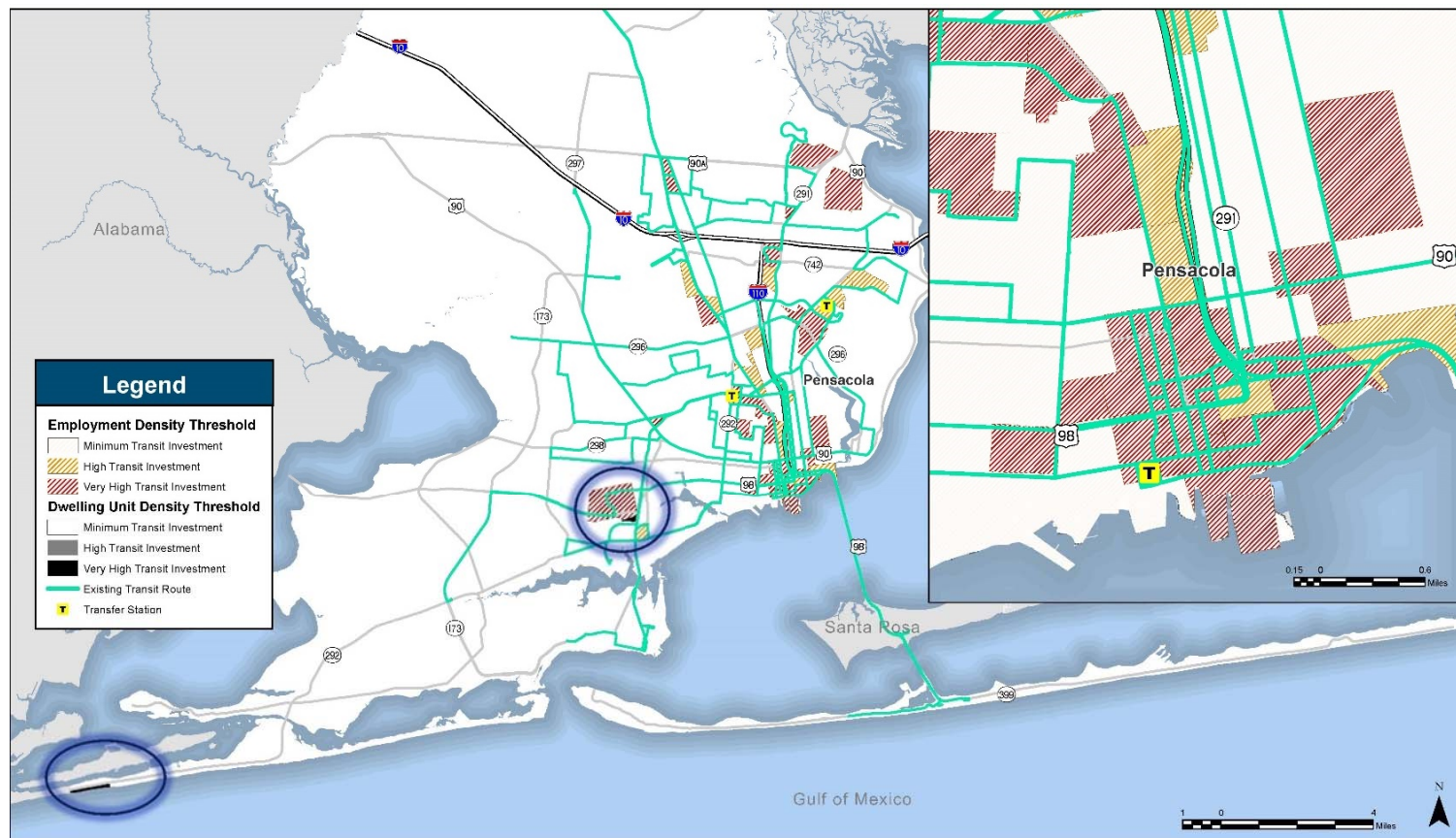
Within the county, there are existing areas in which employment densities are generally supportive of higher levels of transit service; these areas are served by existing ECAT fixed-route service. The majority of the existing transit-supportive areas are:

- In and around downtown Pensacola
- Along US 29/Pensacola Boulevard
- Along SR 291/Davis Highway
- Along SR 289/North 9th Avenue

Only two census blocks in the county indicated a very high density threshold, which are circled on Map 7-2. The most prominent employment density growth is anticipated outside of downtown Pensacola, along the west side of US 29/Pensacola Boulevard south of I-10 (circled in Map 7-3), and Perdido Key, where the employment density threshold will increase the level of transit investment from minimum to high.

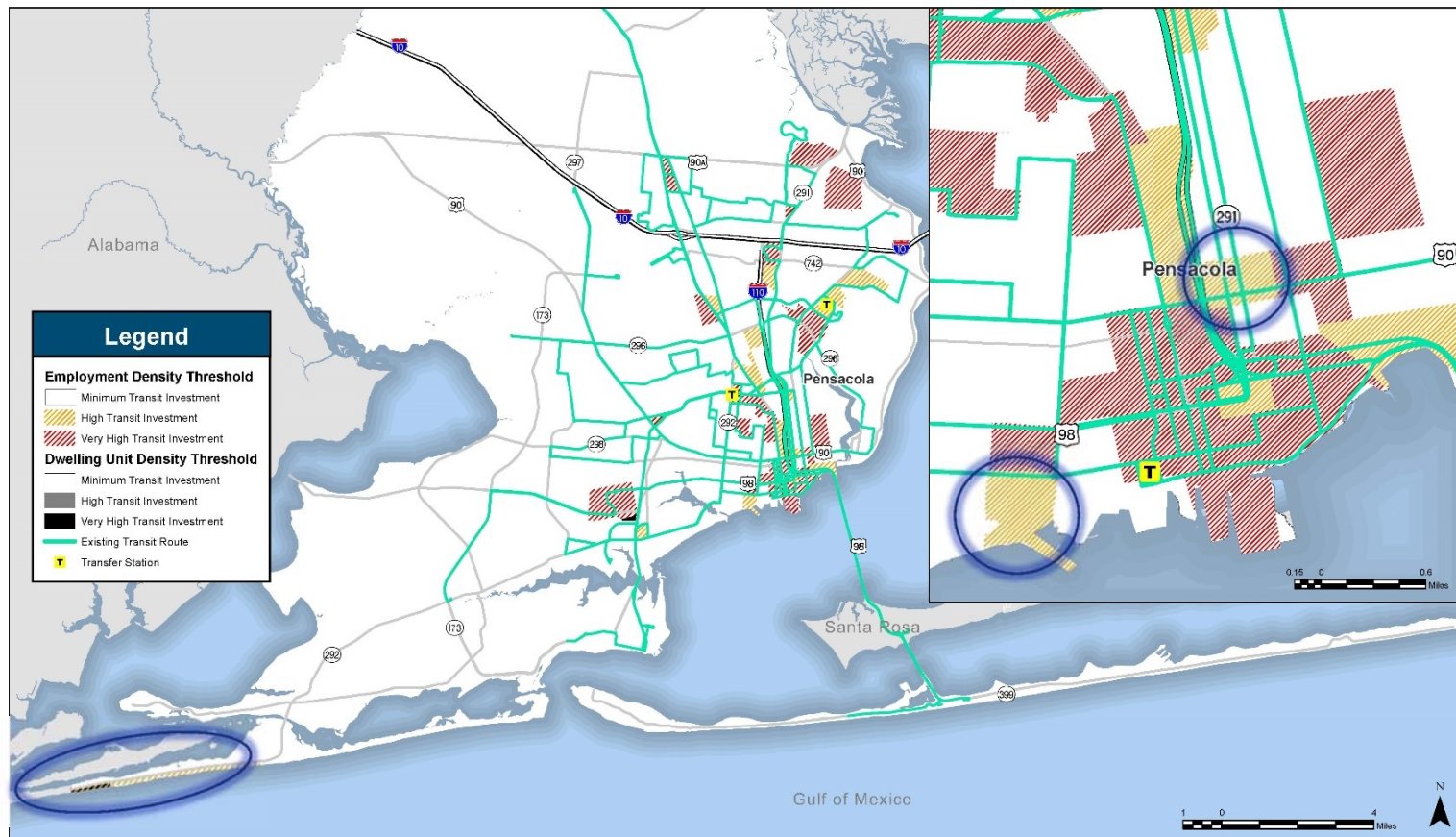
Although areas of “high” and “very high” dwelling unit and employment densities existing today, future growth in these areas indicate an increased opportunity to support higher levels of transit investment, such as bus rapid transit (BRT) or light rail service, than exists today along one or more of these corridors. Outside of the urbanized area, however, there is not anticipated to be much change in densities between now and 2026 compared to the urbanized Pensacola area.

Map 7-2: Density Threshold Assessment (2017)



2017 Density Threshold Assessment

Map 7-3: Density Threshold Assessment (2026)



2026 Density Threshold Assessment

Forecast Ridership Modeling and Analysis

Ridership forecasts were prepared using the most recent version (Version 4.2.2) of T-BEST (Transit Boardings Estimation and Simulation Tool), the FDOT-approved transit demand forecasting tool. T-BEST is a comprehensive transit analysis and ridership-forecasting model that can simulate travel demand at the individual route level. The software was designed to provide near- and mid-term forecasts of transit ridership consistent with the needs of transit operational planning and TDP development. In producing model outputs, T-BEST also considers the following:

- *Transit network connectivity* – The level of connectivity between routes within a bus network—the greater the connectivity between bus routes, the more efficient the bus service becomes.
- *Spatial and temporal accessibility* – service frequency and distance between stops—the larger the physical distance between potential bus riders and bus stops, the lower the level of service utilization; similarly, less frequent service is perceived as less reliable and, in turn, utilization decreases.
- *Time-of-day variations* – Peak-period travel patterns are accommodated by rewarding peak service periods with greater service utilization forecasts.
- *Route competition and route complementarities* – Competition between routes is considered—routes connecting to the same destinations or anchor points or that travel on common corridors experience decreases in service utilization; conversely, routes that are synchronized and support each other in terms of service to major destinations or transfer locations and schedule benefit from that complementary relationship.

The following section outlines the model input and assumptions, includes a description of the T-BEST scenario performed using the model, and summarizes the ridership forecasts produced by T-BEST.

Model Inputs/Assumptions and Limitations

T-BEST uses various demographic and transit network data as model inputs. The inputs and the assumptions made in modeling the ECAT system in T-BEST are presented below. The ECAT model used the recently-released T-BEST Land Use Model structure (TBEST Land Use Model 2016), which is supported by parcel-level data developed from the Florida DOR's statewide tax database. The DOR parcel data contains land use designations and supporting attributes that allow the application of Institute of Transportation Engineers (ITE)-based trip generation rates at the parcel level as an indicator of travel activity.

It should be noted, however, that T-BEST is not interactive with roadway network conditions. Therefore, ridership forecasts will not show direct sensitivity to changes in roadway traffic conditions or speeds.

Transit Network

The transit route network for all ECAT routes was created to reflect 2015 conditions, the validation year for the model. The transit network for Escambia County was obtained in General Transit Feed Specification (GTFS) format, and the data from the GTFS file were verified and updated as needed. Data include:

- Current service span
- Existing headways (frequency at which a bus arrives at a stop—e.g., 1 bus every 60 minutes)
- Passenger travel times on board a bus
- Special generators
- Observed average daily ridership

New ECAT routes 31, 32, 41, and 52 were included. Because 2015 data were not available for these routes, a rider/mile rate was applied using 2015 ridership data from old routes 41 and 42. Route 66 was not included in the model because no comparable ridership data could be obtained, as the route services a new area and has no comparable headways.

Demographic Data

The demographics used as the base input for the T-BEST model were derived from Census 2010 geography and population characteristics, ACS Five-Year Estimates (2009–2013), 2014 InfoUSA employment data, and 2013 parcel-level land use data from the Florida DOR. Using the data inputs listed above, the model captures market demand (population, demographics, employment, and land use characteristics) within ¼-mile of each stop.

Population and Employment Growth Rates

T-BEST uses a socio-economic data growth function to project population and employment data. A population growth rate and an employment growth rate were calculated using the socio-economic data forecasts developed for the latest NWFRPM. As indicated previously, population and employment data are hard-coded into the model and cannot be modified by end-users. As applied, the growth rates do not reflect fluctuating economic conditions as experienced in real time.

Special Generators

Special generators were determined to evaluate locations with opportunities for high ridership. For ECAT, these include the following:

- | | |
|-------------------------------|---------------------------------------|
| • ECAT Transfer Center | • Naval Air Technical Training Center |
| • PSC Transfer Center | • Gulf Breeze Hospital |
| • Downtown Transfer Center | • Rehabilitation Institute |
| • Naval Hospital of Pensacola | • Sacred Heart Hospital |
| • University of West Florida | • Cordova Mall |
| • Pensacola State College | • Town and Country Plaza |

T-BEST Model Limitations

It has long been a desire of FDOT to have a standard modeling tool for transit demand that could be standardized across the state similar to the Florida Standard Urban Transportation Model Structure (FSUTMS) model used by MPOs in developing long range transportation plans. Although T-BEST is an important tool for evaluating improvements to existing and future transit services, model outputs do not account for latent demand for transit that could yield significantly higher ridership, and, correspondingly, they may overestimate demand in isolated cases. In addition, T-BEST cannot display sensitivities to external factors such as an improved marketing and advertising program, changes in pricing service for customers, and other local conditions.

Although T-BEST provides ridership projections at the route and bus stop levels, its strength lies more in its ability to facilitate relative comparisons of ridership productivity. As a result, model outputs are not absolute ridership projections but, rather, are comparative for evaluation in actual service implementation decisions. T-BEST has generated interest from departments of transportation in other states and continues to be a work in progress that will become more useful as its capabilities are enhanced in future updates to the model. Consequently, it is important for ECAT to integrate sound planning judgment and experience when interpreting T-BEST results.

Ridership Forecast

Using these inputs, assumptions, and actual ridership data, the T-BEST model was validated. Using the validation model as the base model, T-BEST ridership forecasts for this TDP major update planning starting year, 2017, and horizon year, 2026, were developed. The generated annual ridership forecasts reflect the estimated level of service utilization if no changes were to be made to any of the fixed-route services.

Table 7-2 shows the projected number of annual riders by route in 2017 and 2026 as well as average annual ridership growth rates from 2017 to 2026 derived from T-BEST.

Based on the T-BEST model results shown in Table 7-2, maintaining the status quo will result in a slight increase in ECAT transit ridership over time. According to the projections, overall average annual ridership is expected to increase by 2.4% by 2026, or an annual growth rate of about 0.24%. The model results show that the most significant ridership growth (more than 50%) in the existing ECAT network will occur on the following routes within the next 10 years:

- Route 1
- Route 41
- Route 47
- Route 57
- Route 58
- Route 60
- Pensacola Beach Trolley

Routes 43, 52, and 55 and the UWF Trolley are projected to have negative growth. This is likely due to the negative population growth projections obtained from the NWFRPM.

For ECAT to increase its market share for transit, service expansion will need to strategically occur in growing areas. The service improvements identified in this plan, in other transit planning efforts, and from the public feedback received combined will provide better transit services for the service area.

Table 7-2: ECAT Average Annual Ridership and Growth Rates with No Improvements, 2017–2026*

Route	Average Annual Ridership, 2017	Average Annual Ridership, 2026	Absolute Change, 2017–2026	Average Annual Growth Rate, 2017–2026
Route 1	73,866	75,185	11,923	0.71%
Route 2	142,459	143,959	1,319	0.18%
Route 31	14,820	15,028	1,500	0.11%
Route 32	123,492	123,601	208	0.14%
Route 41	13,322	15,543	2,221	1.67%
Route 43	92,757	92,544	-213	-0.02%
Route 44	51,165	51,648	483	0.09%
Route 45	190,623	194,497	3,874	0.20%
Route 47	84,895	90,728	5,833	0.69%
Route 48	61,647	61,624	-23	0.00%
Route 50	96,343	101,052	4,709	0.49%
Route 51	54,234	56,924	2,690	0.50%
Route 52	107,103	107,046	-57	-0.01%
Route 55	87,984	87,422	-562	-0.06%
Route 57	23,564	24,771	1,207	0.51%
Route 58	25,746	27,236	1,490	0.58%
Route 59A	34,493	35,540	1,047	0.30%
Route 59X	2,936	2,974	38	0.13%
Route 60	6,361	6,719	358	0.56%
Route 61	5,604	5,757	153	0.27%
Route 63	45,250	46,252	1,002	0.22%
Route 64	18,781	19,674	893	0.48%
UWF Trolley	112,845	111,238	-1,607	-0.14%
Beach Trolley	167,636	179,559	11,923	0.71%
Total All Routes	1,637,926	1,676,521	38,595	0.24%

*Based on T-BEST model

Section 8: Alternatives Evaluation

This section identifies the potential transit improvements developed for the *Connections 2026* TDP. Those proposed improvements, or alternatives, for fixed-route service represent the transit needs for the next 10 years without consideration of funding constraints.

The identified service improvements were then ranked using an evaluation process. This prioritized list of potential improvements was used to guide the 10-year implementation and cost feasible financial plans. As the urbanized Pensacola area continues to grow, and if the demand for transit follows that same overall growth, the prioritized transit needs will assist Escambia County in selecting and implementing service improvements as funding becomes available.

Development of Alternatives

The *Connections 2026* TDP transit alternatives consist of improvements to enhance existing ECAT services and improvements that expand transit services to new areas. The alternatives reflect the transit needs of the community and have been developed based on information gathered through the following methods:

- **Public Workshops and Stakeholder Discussions** – Public workshops and stakeholder discussions have been an effective technique for obtaining substantive public input on transit needs throughout the *Connections 2026* planning process. Several well-attended public workshops and discussion groups were held to gather input from the public, stakeholders, and bus operators regarding what alternatives should be considered for the next 10 years.
- **Transit Surveys** – Four surveys were conducted as part of the *Connections 2026* planning process to obtain additional input from riders and non-riders in the community. An on-board bus survey targeted bus passengers, and two other surveys targeted non-users and were used at the public workshops and discussion groups. In addition, ECAT bus operators were surveyed to gather input on rider and operator comments/concerns.
- **Transit Demand Assessment** – An assessment of transit demand and needs was conducted for Escambia County using various GIS-based analysis tools. These technical analyses, together with the baseline conditions assessment and performance reviews conducted previously, also were used in developing the list of transit alternatives by identifying areas that have characteristics shown to be supportive of transit.
- **Situation Appraisal** – Requirements for a 10-year TDP in Florida include the need for a situation appraisal of the environment in which the transit agency operates. The purpose of this appraisal is to help develop an understanding of the transit operating environment in Escambia County in the context of the following elements:
 - Socioeconomic trends
 - Travel behavior

- Land use
- Public involvement
- Organizational attributes
- Technology
- Regional transit issues
- Assessment of the plans reviewed

From the above, several improvement alternatives were developed and grouped into the following three main categories:

- Service
- Capital/Infrastructure
- Policy/Other

Specific recommendations within each of these categories are summarized below.

Service Improvements

Service improvements include enhancements to existing routes related to frequency, extended service hours, and/or more days of service. This also includes service expansion, including new routes for operating in areas not currently served ECAT.

Improvements to Existing Routes

Expanding hours and increasing frequencies on existing bus routes are significant needs identified through the public involvement efforts performed as part of the development of the *Connections 2026* TDP. Needed improvements to existing fixed routes include the following:

- **Double frequency on selected routes** – Input from the public involvement process identified the need for higher frequencies in general as one of their highest priorities. The enhanced service could be provided on the routes with the highest demand—Routes 1, 2, 32, 43, 52, and 55. Current headways are 60 minutes for these routes, with the exception of Route 52, which has 30–60 minute headways. Routes 32 and 52 were recently implemented April 1, 2016.
- **Extend service later on all existing routes (service until 10:00 PM)** – From the on-board survey, bus operator surveys, public involvement workshops, and interviews, a need for adding later service for students who take later classes and for workers with later schedules was identified as a high priority. Most routes currently end service at 7:00 PM on weekdays, with the exception of Routes 31, 50, 57, 59A, 59X, 60, and 64 and the UWF Trolley. To address this need, service all regular routes could be extended by approximately 3 hours, or until 10:00 PM.
- **Increase Saturday service to 60-minute headways** – From various activities during public involvement process, weekend service was identified as important need, especially for workers with non-traditional employment schedules. The current Saturday service on most routes operates

at 120 minute headways. To address this need, Saturday service could be increased to 60-minute frequencies on all routes that currently operate on Saturday.

- **Implement limited Sunday service on selected routes** – To address the aforementioned need for weekend service, Sunday service could be implemented on the four high-performing routes that service the most important commercial corridors: Routes 2, 32, 45, 52, and 55. Route 42, a high-performing route, was split into routes 32 and 52 in April 2016. The service could be provided at 60-minute headways for 6 hours on Sundays.
- **Extend Route 47 to Nine Mile Road** – Extend Route 47 to the proposed Navy Federal Connector on Nine Mile Road to increase the route distance by two miles roundtrip. The current schedule shows sufficient layover time/flexibility to accommodate this extension. Alignment adjustments elsewhere may be needed if current layover time is not cut.

New Service Expansions

Service improvements also could include the provision of new service as follows:

- **Navy Federal Connector** – A need was expressed for transit service along Nine Mile Road, an important commercial arterial connecting to existing transit routes. The lack of parking for the growing Navy Federal Credit Union employment center also highlighted the need for alternative modes of transportation. The route could connect the Navy Federal Credit Union at the Heritage Oaks Commerce Park via Nine Mile Road to the University Town Center.
- **Pensacola-Navarre Express** – Express services are characterized as peak-hour limited-stop services designed primarily to meet the transportation needs of commuters. Express service ideally operates as a point-to-point service. A regional connection to Navarre was indicated in the public involvement process and the 2040 LRTP. This route would serve US 98, an important arterial, and provide important connections to Gulf Breeze and downtown Pensacola.
- **Pensacola-Milton Limited Express** – Input from the public involvement process and the LRTP indicated a need to effectively connect the region to Pensacola, particularly Milton and Pace. An express route connecting these areas to downtown with park-and-ride stops at Milton, Pace, Ellyson Industrial Park, and ECAT Transfer Center via State Road 10 and I-10 could help this regional need.
- **Navy Federal-Downtown Express** – Input from the public involvement activities conducted as a part of the *Connections 2026* TDP indicated the need for a bus route to service the Navy Federal Credit Union. The growing employment site has no existing service, and parking does not meet demand. The deficiency will increase, as the Navy Federal Credit Union plans to double its employees in the coming years. Implementing a route will alleviate the parking issues and provide workers more commute options that connect to downtown Pensacola. The route would connect downtown Pensacola to the Navy Federal Credit Union via I-110 and I-10. Alternatively, the route could deviate along Pine Forest Road and provide a connection to Route 47.

- **Orange Beach-Perdido Key Limited Express** – This route could would Orange Beach to Perdido Key and end at the Walmart and Target located on Blue Angel Parkway and SR 292, via SR 292. Walmart and Target were identified as major trip attractors and are located near several Habitat for Humanity projects.
- **Pensacola-Perdido Key Connector** – This route would connect downtown Pensacola to the Walmart and Target located on Blue Angel Parkway and SR 292, via SR 292. Walmart and Target were identified as major trip attractors and are located near several Habitat for Humanity projects.
- **Passenger Rail** – A study commissioned by the SRC reviewed the feasibility of returning passenger rail (Amtrak) to the Gulf Coast area. The rail service, if implemented, would connect New Orleans to Jacksonville with a stop in several cities, including Pensacola.
- **Flex Service** – This proposed service is designed to operate in rural areas and would provide connections between major city cores via major corridors. The noted service is proposed as a deviated fixed-route service with a maximum number of deviations per round trip. Each deviation will be limited to a maximum of ¾-mile distance away from the trunk line. Route deviation is a hybrid public transportation service with features of fixed-route, fixed-schedule transit service and demand-responsive, curb-to-curb service. Requests for route deviation must be made in advance. Another advantage of this service is that the route-deviated service is officially recognized as demand-responsive and, therefore, meets all requirements for complementary paratransit service required by the ADA; no separate complementary ADA paratransit service is required. The service frequencies for this service will vary from 60 to 90 minutes, and service is generally provided on weekdays and Saturdays.
 - **Cantonment Flex** – A need to service the less populated area of Cantonment was expressed. The flex route could connect residents to Route 60, which currently connects Century to downtown Pensacola on three daily trips.
 - **Milton Flex** – Milton is a less-populated area in Santa Rosa County. The flex route could connect residents to the proposed Pensacola-Milton Limited Express.
 - **Gulf Beach Highway Flex** – This route could service the residential area surrounding Gulf Beach Highway/SR 292 from Navy Boulevard to S Blue Angel Parkway, the location of Target and Walmart stores. The residential area contains several Habitat for Humanity properties that particularly could benefit from this service. The route would connect to the proposed Pensacola-Perdido Key Connector, the proposed Orange-Beach-Perdido Key Connector and existing Routes 55, 57, 59A, 59X and 64.
 - **Century Flex** – This route could service the urbanized areas of Century and Flomation (AL) and connect to the existing Route 60.
- **Water Ferry and Downtown Trolley** – Based on plans that are already underway, the ferry service would connect downtown Pensacola to Fort Pickens and Pensacola Beach using two vessels. The water ferry service is expected to be seasonal, from mid-March through October, with 35–45

minute headways each way. Access to the downtown transfer center from the downtown marina could be provided by a ferry shuttle; potential for local funding for a shuttle was discussed during the public involvement process.

Map 8-1 presents the proposed *Connections 2026* TDP service alternatives identified for the next 10 years.

Capital/Infrastructure Improvements

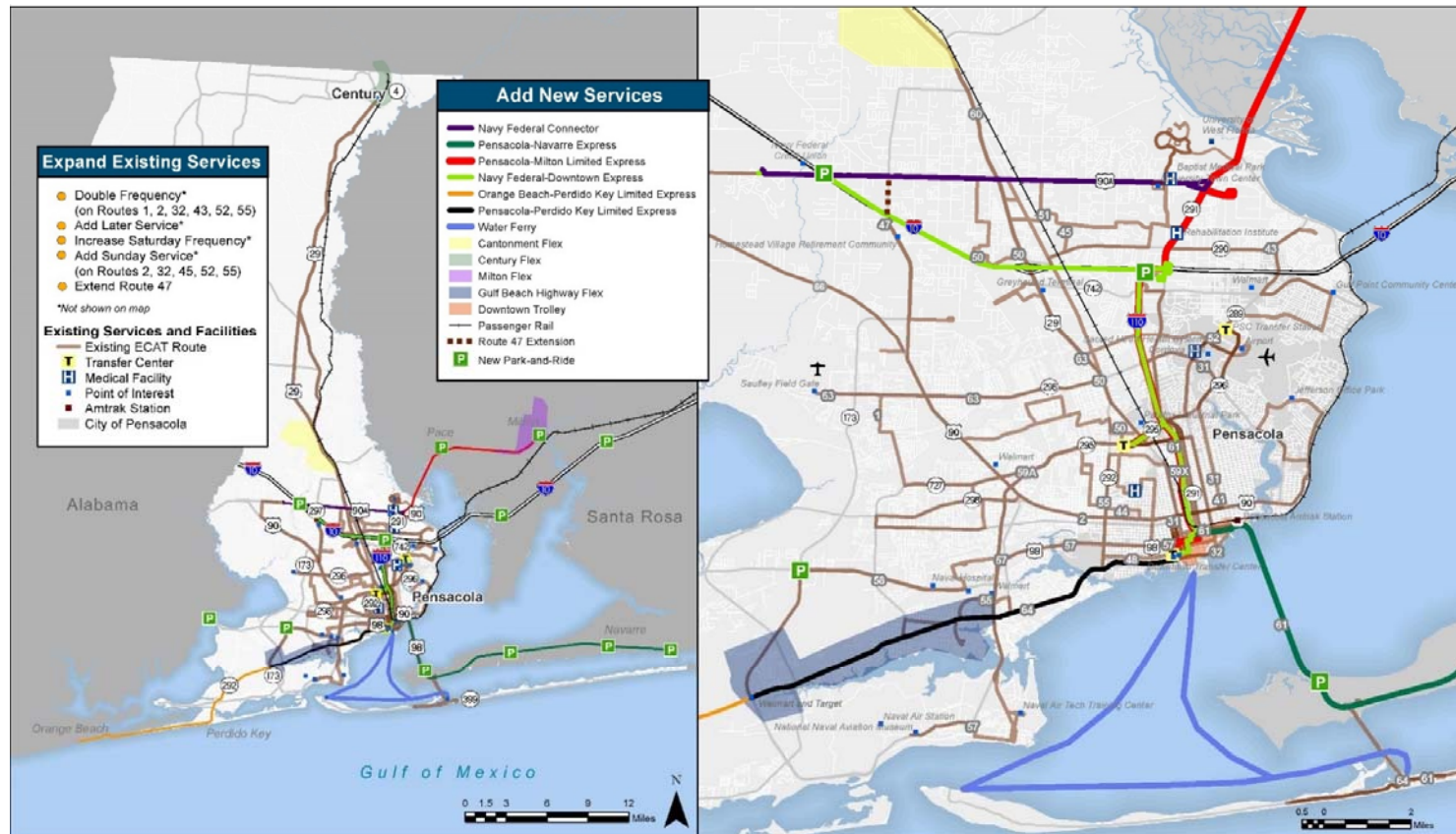
Potential capital/infrastructure improvements include the following:

- **Replace/add new vehicles** – Continue the existing vehicle fleet replacement program and add new vehicles to serve the proposed service improvements and new routes.
- **Expand and improve bus stop infrastructure** – The TPO and ECAT can continue to improve infrastructure at bus stops, including benches, shelters, bicycle storage facilities, and other infrastructure. This would enhance the rider’s experience while waiting for the bus and could also potentially attract new riders
- **Improve bus stop safety and ADA accessibility** – Ensuring the safety all riders while accessing bus stops and waiting for the bus, as well as guaranteeing that ADA requirements are fulfilled for all transit facilities is important to the overall safety and accessibility of the transit system. ECAT can develop a bus stop safety and ADA accessibility plan that prioritizes bus stop improvements and improves ADA accessibility.
- **Establish park-and-ride lots** – Park-and-ride facilities provide collection points for travelers to transfer from auto to transit or between autos (from a single-occupant vehicle to a carpool or vanpool). When conveniently located and carefully planned and implemented, park-and-ride facilities are integrated into the overall transportation network and can encourage a shift from single-occupant vehicles to transit or other alternative modes. Current park-and-ride locations within Escambia County that are supported by the rideOn program, a commuter services program that coordinates ridersharing arrangements, include:
 - Pensacola I-110 at Civic Center (near ECAT Stop)
 - Century Courthouse Annex
 - Scenic Highway at I-10 next to the Dairy Queen

Based on public input and demand analysis for the *Connections 2026* TDP, as well as a review of the 2040 LRTP recently developed by the TPO, the following potential locations were identified for developing park-and-ride facilities in the next 10 years:

- | | |
|---|-----------------------------|
| ○ E Bay Boulevard and US 98 | ○ W Nine Mile Road and I-10 |
| ○ Tiger Point at Avalon Boulevard and US 98 | ○ University Town Plaza |
| ○ Gulf Breeze at Fairpoint Drive and US 98 | ○ Milton |
| ○ Lillian, Alabama on US 98 | ○ Pace |
| ○ N Blue Angel Parkway and US 98 | ○ I-10 and Avalon Blvd |
| | ○ I-10 and SR 87 |

Map 8-1: 10-Year Service Alternatives



Ten-Year Transit Alternatives

- **Transit Signal Priority (TSP)** – TSP is any operational strategy that facilitates and prioritizes the movement of transit vehicles through traffic-signal controlled intersections. Strategies include green phase extension, early green phase, and bus queue jumper. This strategy could be implemented in the most congested corridors to improve on-time performance for buses. Corridors to consider for potential implementation include:
 - SR 10 (US 90A)/Nine Mile Road from SR 297/Pine Forest Road to US 29/SR 95
 - SR 10A (US 90)/Mobile Highway from Fairfield Drive/SR 727 to Kirk Street
 - SR 10A (US 90)/Scenic Highway from Strong Street to Hyde Park Road
 - SR 10A (US 90)/Scenic Highway from Hyde Park Road to Summit Boulevard
 - SR 95 (US 29)/Pensacola Boulevard from I-10/SR 8 to Nine Mile Road/SR 10/US 90A
 - SR 173/Blue Angel Parkway from Lillian Highway/SR 298 to Saufley Field Road/CR 296
 - SR 291/Davis Hwy from I-10/SR 8 to University Parkway
 - SR 292/Gulf Beach Highway from Fairfield Drive/SR 727 to Navy Boulevard/SR 295
 - SR 295/Navy Boulevard from SR 292/Barrancas Avenue to SR 295/New Warrington Road
 - SR 297/Pine Forest Road from I-10/SR 8 to Nine Mile Road/US 90A/SR 10
 - SR 727/Fairfield Drive from Lillian Highway/SR 298 to Mobile Highway/US 90/SR 10A
 - CR 295A/Saufley Field Road from Mobile Highway to Blue Angel Parkway
 - Main Street from Baylen Street to Tarragona Street
- **New ECAT operations and maintenance facility** – A need for a new operations and maintenance facility was identified due to inadequate space and drainage issues at the current Rosa Parks Transfer Complex. Potential locations for the new facility are yet to be determined.
- **Enhance/expand the Rosa L. Parks Complex** – A need to expand and enhance the Rosa L. Parks Complex was identified due to lack of available space for vehicles and drainage issues. If the operations and maintenance facility is relocated, this could leave more space for further enhancements at the current facility.
- **Development of a downtown intermodal facility** – The need for a new intermodal transit center for ECAT in downtown Pensacola was also identified. In addition to connecting passenger to the proposed water ferry, this facility could provide added benefit by allowing for seamless transfers to the Amtrak station by proximity or through an effective shuttle system, when passenger rail service returns.
- **Miscellaneous capital needs/amenities** – ECAT has identified several miscellaneous capital needs, such as air conditioning improvements, bathroom facility upgrades, employee parking expansion, computer software/security technologies, and other amenities/improvements.

Policy/Other Improvements

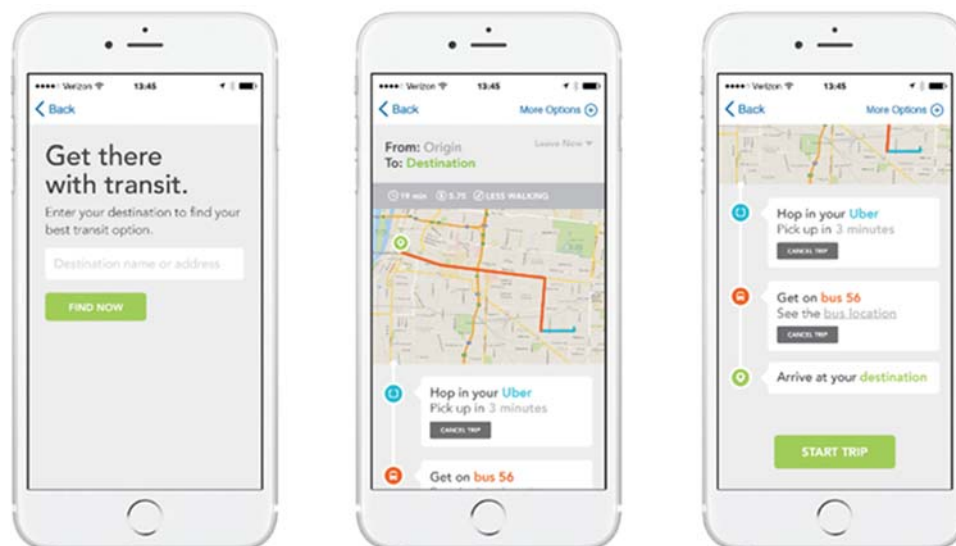
Other potential improvements include various general improvements that are not necessarily route-specific or capital-related. These improvements are drawn primarily from input on public involvement efforts

performed as part of the development of the *Connections 2026* TDP. Other needed improvements identified for the next 10 years are as follows:

- **Partnership to establish water ferry connections** – Escambia County should explore partnerships with local business and community organizations to coordinate transportation from the organizations to the water ferry marina.
- **Shared park-and-ride lot agreements** – Agreements with private or public landowners that allow parking spaces to be shared by transit passengers in underutilized and/or off-peak private lots are another way to provide park-and-rides at a lower or no cost, especially where real estate cannot be feasibly purchased. Shared parking lots opportunities should be explored in the area just west of Baptist Medical Park and the area near I-10 and SR 95 to capture residential areas in northern suburbs. Another shared lot agreement should be explored in Orange Beach for riders catching the Orange Beach-Pensacola Limited Express.
- **Promote/expand transportation demand management (TDM) strategies** – TDM strategies strive to reduce single-occupant vehicle trips or redistribute them to other transportation alternatives. ECAT should continue to promote the region’s TDM programs. ECAT should continue to coordinate with the West Florida Regional Planning Council (WFRPC) on its rideOn program for FDOT District 3. The West Florida Commuter Assistance Program serves 10 counties throughout Northwest Florida including Escambia, Santa Rosa, Okaloosa, Walton, Jackson, Washington, Bay, Calhoun, Gulf, and Holmes and provide a transportation hotline to assist commuters with any questions or concerns they may have about their commute options. They also offer information and access to a variety of rideshare programs to fit commuters’ needs. Rideshare programs provide sensible alternatives for daily commutes, offering a database to match commuters in a carpool or vanpool program, provide information about park-and-ride lots and how employers or employees can start a vanpool program of their own. WFRPC operates and manages the rideOn program for FDOT District 3, which currently serves as FDOT’s District 3 Commuter Assistance Program (CAP) in the 10 western counties of the District. Programs include the following:
 - Carpooling consists of two or more people sharing a ride and is a cost-effective means of reaching a daily destination, saving users hundreds of dollars each year in reduced fuel consumption and maintenance costs. The WFRPC seeks employers wanting to join the program.
 - Vanpooling is a group of 8–15 people riding together on their daily commute in a van, either provided by their employer or by some other means. There is usually a fee for riders to cover the cost of gas. There was an expressed need for vanpooling, especially for the area surrounding the Navy Federal Credit Union, Lillian, AL, Orange Beach and other areas like Century. This program could be coordinated by rideOn.
 - Park-and-ride lots are areas in which people can park their cars to share the rest of their commute, either by vanpool, carpool, or public transportation. The WFRPC provides information on current and potential park-and-ride lots.

- Commuter Choice programs are promoted by the US Environmental Protection Agency (EPA) and the US Department of Transportation (DOT) and are tax-free incentives for employees and employers to use public transportation, carpooling, and vanpooling programs. Commuter Choice programs incentives include tax benefits up to \$255 a month and transit vouchers. In areas where vouchers are not available, commuters may be reimbursed for their cost of commuting by vanpool.
- **Land development regulations** – Land use and transportation, when planned for concurrently, can lead to more efficient land use and transportation networks. Escambia County should encourage and guide other local governments in modifying their policies and regulations by adopting more multimodal supportive land uses and land development regulations to enhance the overall transportation network and connectivity within the county. If local governments are on board to participate in a transit-supportive framework, this will help Escambia County make rapid and significant progress in integrating transit into such major developments. Land development regulations can drastically shape the walkability of an urbanized area, which, in turn, can promote higher transit ridership. For instance, minimum parking requirements and road design standards that are automobile-oriented can negatively impact walkability, thereby negatively impacting a transit-supportive environment. Therefore, Escambia County should engage with the City of Pensacola to ensure that land development policies and land development codes require transit infrastructure that foster transit services and create a more balanced transportation system.
- **Partnerships with ridesourcing companies** – Transit agencies around the U.S. have started pilot programs to partner with ridesourcing companies such as Uber and Lyft. ECAT should establish a partnership with a ridesourcing company with an established presence. Figure 8-1 illustrates an example mobile application that integrates Uber and transit services.

Figure 8-1: Example Ridesourcing-Transit Partnership Application



- **Ride voucher programs** – Ride voucher programs are designed to meet the transportation needs of those who cannot access the fixed-route service network because of their work schedule or because they live or work outside the fixed-route service area. Since current ECAT bus service generally ends at 7:00 PM, ECAT should explore partnerships with ridesourcing companies such as Uber to provide supplemental service after traditional fixed-route service hours. A user would purchase a voucher from the transit agency, which would qualify him/her for a ride with a participating ridesharing company up to a predetermined fare. Such a program would fill schedule and network gaps in the fixed-route system and would be implemented wherever ridesharing service is available in the county.
- **Evaluate existing ECAT fixed-route fare structure/policy** – Based on guidance from the MTAC, it is recommended that ECAT evaluate the existing fixed-route fares to ensure a fair and equitable fare structure and optimal farebox recovery ratio as new services are added.
- **Improve route-level performance monitoring** – Improve performance monitoring program to include a comparative analysis of route performance. ECAT currently has a monitoring program which collects route level data and uses passengers per revenue hour and passengers per revenue mile to evaluate performance of its routes on a regular basis. Appendix D provides the recommended program for ECAT to enhance the current monitoring efforts. The methodology uses specific route-level data that are already collected by ECAT at this time to identify three levels of performance thresholds for tracking routes for potential monitoring/modification/discontinuation.
- **Planning recommendations** – The following studies are recommended:
 - Connection service to water ferry – to help determine the most feasible means of connecting water ferry services to the ECAT downtown transfer center.
 - Transit Signal Priority – to determine the feasibility and impact of implementing various TSP technologies in the most appropriate corridors and intersections.

Alternatives Evaluation

This section summarizes the evaluation process for service alternatives developed for the *Connections 2026* TDP. Because many alternatives are identified, ranging from expansion of existing routes to implementation of new routes, it is important for Escambia County to prioritize these improvements to effectively plan and implement them within the next 10 years using existing and/or new funding sources.

Alternatives Evaluation Methodology

A methodology was developed to evaluate and prioritize the transit alternatives presented in the previous section. To prioritize and program these service improvements, it is important to weigh the benefits of each service improvement against the others. By conducting an alternatives evaluation, Escambia County and ECAT can better prioritize projects and allocate funding using an objective service implementation process. The remainder of this section identifies and defines the evaluation criteria to be used in prioritizing

the service improvements developed for the *Connections 2026* TDP and the methodology by which those criteria should be applied.

Three evaluation categories are identified for determining criteria for the evaluation:

- Public Outreach
- Transit Markets
- Productivity and Efficiency

Table 8-1 lists these evaluation categories, each category's corresponding criteria, the associated measure of effectiveness, and the assigned weighting for each criterion.

Table 8-1: Alternative Evaluation Measures

Category	Criteria	Measure of Effectiveness	Relative Weighting	Overall Category Weight
Public Outreach	Public Input	Level of interest in specific alternatives (High, Moderate, Low)	30%	30%
Transit Markets	Traditional Market	Percent of corridor in “High” or “Very High” Transit Orientation Index (TOI)	15%	40%
	Discretionary Market	Percent of corridor area that meet the “minimum” Density Threshold Assessment (DTA) tier for employment or dwelling unit density	15%	
	Regional Market	Connectivity to adjacent counties	10%	
Productivity & Efficiency	Productivity	Trips per hour (T-BEST generated trips and revenue hours of service)	15%	30%
	Cost Efficiency	Cost per trip (including new trips)	15%	
Total			100%	100%

Public Outreach

An extensive public outreach process was performed for the *Connections 2026* TDP 10-year planning effort, which resulted in numerous opinions and suggestions on transit services from transit users, nonusers, operators, and business, academic, social, and medical organizations. In addition, the public outreach process also included discussions with policy leaders and the technical review committee to gauge their views on transit services. Based on an in-depth review of input from this public outreach effort, interest in a particular route or type of service was categorized as “None,” “Moderate,” or “High” in the alternatives evaluation process.

Transit Markets

For the evaluation of alternatives, three transit markets were identified, including the traditional market (which uses TOI data), the choice market (which uses DTA data), and the regional market:

- **Traditional Market** refers to existing population segments that historically have had a higher propensity to use transit and/or are dependent on public transit for their transportation needs. For the alternatives evaluation, the proportion of each corridor operating within a “High” or “Very High” TOI area was calculated.
- **Discretionary Market** refers to potential riders living in higher-density areas of the county that may choose to use transit as a commuting or transportation alternative. The proportion of each corridor meeting at least the “Minimum” dwelling unit or employment density threshold in the 2014 DTA was calculated and used for the alternatives evaluation.
- **Regional Market** refers to each potential route being assessed for potential regional connectivity. Routes serving key areas outside of Escambia County were considered. Inter-county routes having connections to adjacent counties were scored higher than those limited to serving just Escambia

County. Based on conclusions drawn from public involvement input, regional service to adjacent counties is a much-desired attribute for ECAT routes.

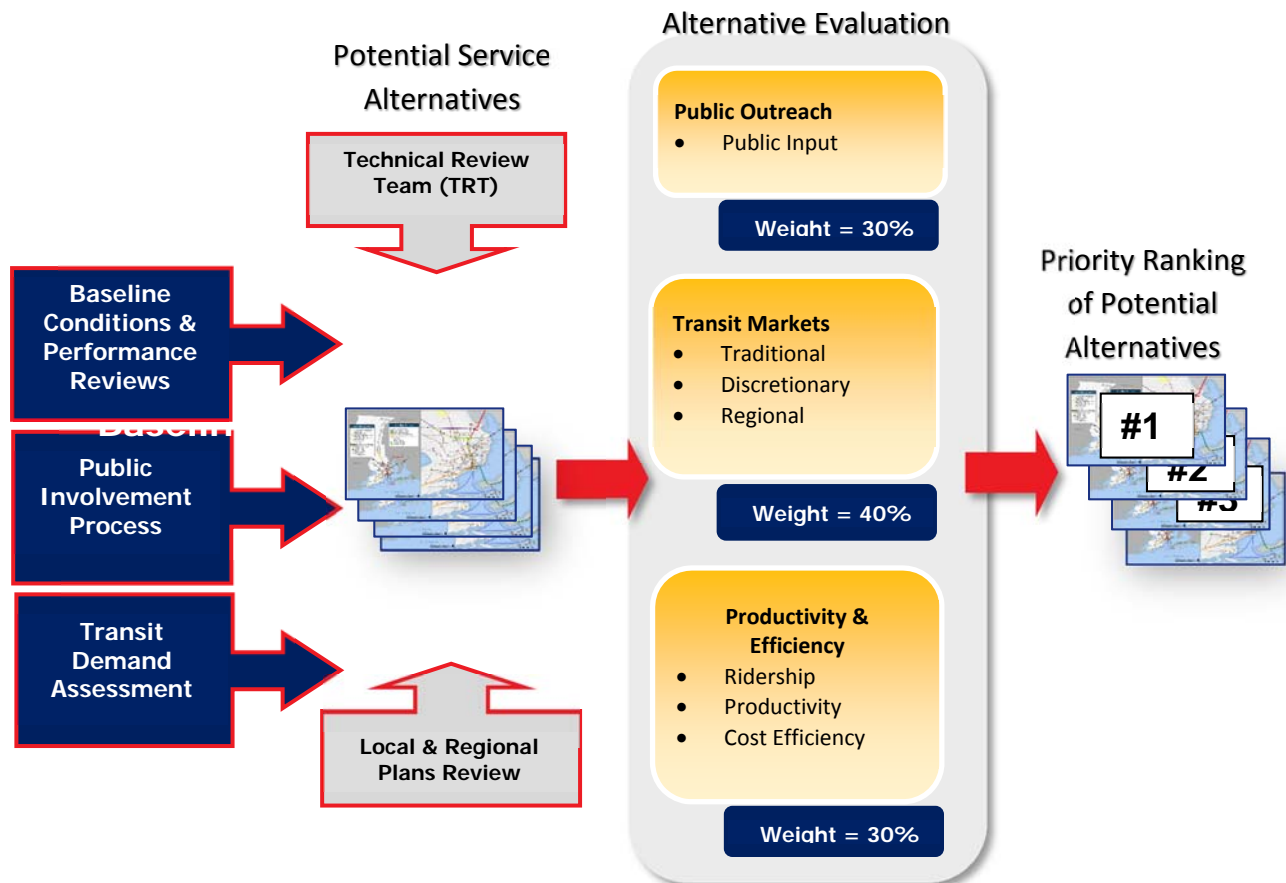
Productivity and Efficiency

Productivity is generally measured in terms of ridership. Service efficiency is used by transit agencies to gauge how well they are using their existing resources. Each measure is critical to the success of the agency, and services performing well in terms of their productivity and efficiency should receive a higher priority. Forecast ridership, revenue hours, and operating cost figures for each individual alternative are used in this measure.

- **Ridership productivity** is measured in terms of annual passenger trips per revenue hour of service. To provide for an equal comparison between alternatives, passenger trips and revenue hours of service were generated using output from T-BEST 2026 ridership data.
- **Cost efficiency** is evaluated for each alternative using a standard transit industry efficiency measure, operating cost per passenger trip. Operating costs used are calculated using operating cost per trip based on ECAT performance data and T-BEST 2026 ridership data.

Figure 8-2 shows the *Connections 2026* 10-year transit service alternatives evaluation process, including criteria, measures, and weights used for each category. A summary of various criteria and measures used in each tier, as well as the evaluation results, are presented in the remainder of this section.

Figure 8-2: Transit Service Alternatives Evaluation Process



Alternatives Scoring Thresholds

As noted, each criterion is assigned a weight. Weighting the criteria affords the opportunity to measure the relative importance of each criterion among the group of criteria to be applied. For each transit alternative, a score was determined either through the computation of the selected measure of effectiveness or through the educated judgment of the analyst. Potential scores were assigned depending on the relative comparison of a given transit alternative with other transit alternatives as it relates to a given criterion. A higher score is consistent with a higher ranking for a given alternative for the criterion being evaluated.

The thresholds for computation-based criteria (traditional market, choice market, trips per hour, operating cost per trip) were determined using the average of the entire data set and one standard deviation above or below the average. Table 8-2 shows the thresholds and scoring for each criterion used in the alternatives evaluation.

Table 8-2: Alternatives Evaluation – Scoring Thresholds

Criteria	Range	Score
Public Input – Interest in Improvement	None	1
	Moderate	3
	High	5
	Very High	7
Traditional Market Potential (% Serving Traditional Market)	Less than (Average – 1 STDEV)	1
	Between (Average – 1 STDEV) to Average	3
	More than Average to (Average + 1 STDEV)	5
	More than (Average + 1 STDEV)	7
Choice Market Potential (% Serving Choice Market)	Less than (Average – 1 STDEV)	1
	Between (Average – 1 STDEV) to Average	3
	More than Average to (Average + 1 STDEV)	5
	More than (Average + 1 STDEV)	7
Regional Market Connectivity	No	0
	Yes	5
Trips per Hour	Less than (Average – 1 STDEV)	1
	Between (Average – 1 STDEV) to Average	3
	More than Average to (Average + 1 STDEV)	5
	More than (Average + 1 STDEV)	7
Operating Cost per Trip	More than (Average + 1 STDEV)	1
	More than Average to (Average + 1 STDEV)	3
	Between (Average – 1 STDEV) to Average	5
	Less than (Average – 1 STDEV)	7

Note: STDEV = statistical standard deviation

Results of Alternatives Evaluation

Each alternative was evaluated using the process summarized above and the detailed results of the evaluation are presented in Table 8-3. From this process, each alternative received a score. The alternatives were then ranked based on their respective score. Table 8-4 presents the prioritized list of improvements based on this process.

Table 8-3: Results of the Alternatives Evaluation

Evaluation Criteria		Double Weekday Frequency on Routes 1, 2, 32, 43, 52, 55	Add Later Weekday Service to 10 pm on all Routes	Increase Saturday Frequency on Existing Routes (60 min headways)	Add Sunday Service on Routes 2, 32, 45, 52, 55	Extend Route 47	Navy Federal Connector	Pensacola-Navarre Express	Pensacola-Milton Limited Express	Navy Federal – Downtown Express	Orange Beach-Perdido Key Limited Express	Pensacola-Perdido Key Fixed Route	Cantonment Flex	Milton Flex	Gulf Beach Highway Flex	Downtown Trolley
Public Involvement	Interest	High	Very High	Very High	Moderate	Moderate	Very High	Very High	Very High	Very High	Moderate	Moderate	High	Moderate	Moderate	Low
	Score	5	7	7	3	3	7	7	7	7	3	3	5	5	3	1
	Weight	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
Traditional Market	% in Traditional Market	2.105%	8.214%	7.888%	2.132%	0.041%	0.000%	0.059%	0.397%	0.566%	0.280%	0.524%	0.000%	0.000%	0.123%	0.000%
	Score	5	7	7	5	3	3	3	3	3	3	3	3	3	3	3
	Weight	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
Choice Market	% in Choice Market	2.098%	8.685%	8.049%	2.124%	0.000%	0.184%	0.230%	0.813%	0.590%	0.184%	0.210%	0.000%	0.000%	0.000%	0.000%
	Score	5	7	7	5	3	3	3	3	3	3	3	3	3	3	3
	Weight	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
Urban/Regional Market	Regional Yes/No?	No	No	No	No	No	No	Yes	Yes	No	Yes	No	No	No	No	No
	Score	0	0	0	0	0	0	7	7	0	5	0	0	0	0	0
	Weight	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
Boardings per Hour	Trip/Hr	15.62	11.01	14.32	19.46	13.00	10.90	0.30	0.60	3.70	1.40	10.10	2.70	7.00	19.30	Not Modeled
	Score	5	5	5	7	5	5	1	1	3	1	5	3	3	7	7
	Weight	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
Operating Cost per Trip	Cost /Trip	\$18.06	\$3.87	\$22.60	\$0.00	\$728.03	\$8.15	\$171.69	\$37.85	\$137.35	\$40.97	\$5.98	\$31.85	\$15.23	\$14.63	\$0.00
	Score	5	5	5	5	1	5	3	5	3	5	5	5	5	5	5
	Weight	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
Total Score		4.50	5.70	5.70	4.20	2.70	4.50	4.30	4.60	3.90	3.20	3.30	3.60	3.60	3.60	3.00

Table 8-4: 10-Year Transit Service Alternatives Ranking

Rank*	Proposed Improvement Reordered by Rank*	Score
1	Add Later Weekday Service to 10 pm on all Routes	5.70
1	Increase Saturday Frequency on Existing Routes (60 min headways)	5.70
3	Double Weekday Frequency on Routes 1, 2, 32, 43, 52, 55	4.50
3	Navy Federal Connector	4.50
5	Add Sunday Service on Routes 2, 32, 45, 52, 55	4.20
6	Pensacola-Navarre Express	4.30
6	Pensacola-Milton Limited Express	4.00
8	Navy Federal –Downtown Express	3.90
9	Cantonment Flex	3.60
9	Milton Flex	3.60
9	Gulf Beach Highway Flex	3.60
12	Extend Route 47	3.30
12	Pensacola-Perdido Key Fixed Route	3.30
14	Downtown Trolley	3.00
15	Orange Beach-Perdido Key Limited Express	2.70

*Alternatives may receive a tied ranking due to the alternative evaluation scoring process.

	Existing Service Improvement
	New Service Improvements

Section 9: 10-Year Cost Feasible Plan

This section outlines the recommended 10-year cost feasible implementation plan developed for the *Connections 2026* TDP. First, the recommended transit services and capital plan to support the funded service plan (Cost Feasible Plan) for the next 10 years is summarized. Thereafter, a summary of the assumptions for capital and operating costs used in developing the 10-year costs and revenues for the recommended plan are presented. Finally, the financial and implementation plans for the recommended 10-year period are presented and the unfunded needs are identified.

10-Year Cost Feasible Plan Improvements

The funded improvements included in the *Connections 2026* TDP were determined after an extensive public outreach program. Improvements were identified for both transit service improvements and capital improvements, which are described further below.

Service Improvements

- **Extend Route 47 to Nine Mile Road** – The Cost Feasible Plan includes extending Route 47 to the proposed Navy Federal Connector on Nine Mile Road to increase the route distance by two miles roundtrip to include the Publix shopping plaza on West Nine Mile Road. There is no cost associated with this improvement, as it is assumed that the extension can be accommodated by the current route schedule.
- **Pensacola-Navarre Express** – This proposed route will serve US 98, an important arterial, and provide important connections to Gulf Breeze and downtown Pensacola.
- **Downtown Trolley** – This new trolley service will provide access between the downtown transfer center and the marina for transit users looking to connect the new water ferry and ECAT system.

Capital/Infrastructure Improvements

- **Expand and Improve Bus Stop Infrastructure** – Improved infrastructure at bus stops, including benches, shelters, bicycle storage facilities, and other infrastructure, is included in the Cost Feasible Plan to enhance the rider experience while waiting for the bus and potentially attract new riders.
- **Improve Bus Stop Safety and ADA Accessibility** – Ensuring the safety all riders while accessing bus stops and waiting for the bus and guaranteeing that ADA requirements are fulfilled for all transit facilities are important to the overall safety and accessibility of the transit system.
- **Establish Park-and-Ride Lots** – Funding to establish park-and-ride facilities to provide collection points for travelers to transfer from auto to transit or between autos (from a single-occupant vehicle to a carpool or vanpool) is provided.
- **New ECAT Operations and Maintenance Facility** – A need for a new operations and maintenance facility was identified due to inadequate space and drainage issues at the current Rosa Parks

Transfer Complex. Although the cost of this new facility is included in the Cost Feasible Plan based on previous County grant applications, potential locations for the new facility have not yet been determined.

- **Development of Downtown Intermodal Facility** – The need for a new intermodal transit center for ECAT in downtown Pensacola is included in the Cost Feasible Plan. In addition to connecting passenger to the proposed water ferry, this facility could provide added benefit by allowing for seamless transfers to the Amtrak station by proximity or through an effective shuttle system when passenger rail service returns.
- **Replace/Add New Vehicles** – Continued replacement of the existing vehicle fleet, based on information provided by ECAT, and the addition of new vehicles to serve the proposed service improvements and new routes is included in the Cost Feasible Plan.
- **Miscellaneous Capital Needs/Amenities** – ECAT has identified several miscellaneous capital needs, such as air conditioning improvements, bathroom facility upgrades, employee parking expansion, computer software/security technologies, and other amenities/improvements.

Cost and Revenue Assumptions

This section presents the capital and operating cost assumptions, along with the costs and revenues associated with the 10-year Cost Feasible Plan.

Operating Cost Assumptions

Numerous cost assumptions were made to forecast transit costs for the time period from 2017 through 2026. These operating costs assumptions are based on a variety of factors, including service performance data from ECAT, and information from other recent Florida TDPs. These assumptions are summarized as follows:

- An average annual inflation rate of 3% was used for all operating cost projections, based on discussions with ECAT staff.
- Annual operating costs for existing services are based on ECAT's FY 2017 budget for the base year of 2017 and inflated at 3% for each year thereafter.
- Annual operating costs for future service enhancements are based on the projected annual service hours and cost per revenue hour of \$85.55 for fixed-route service and \$58.32 for paratransit service (both in 2016\$). The cost per hour was derived using historical and current cost per revenue hour data for existing services. The operating cost per hours figures are inflated annually using the 3% factor.
- As previously noted, extending Route 47 does not require any additional cost, as the existing buses can serve the additional route miles within the current schedule.

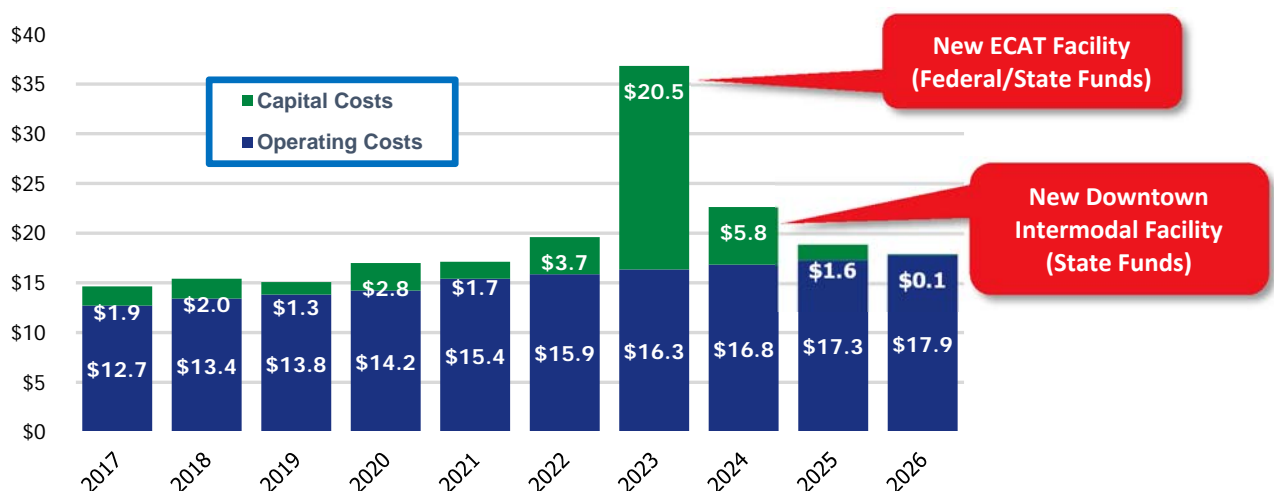
Capital Cost Assumptions

Several assumptions were developed to project the costs for capital needs identified previously. These capital cost assumptions are summarized as follows:

- New vehicles planned to be purchased under this Cost Feasible Plan include those necessary to replace vehicles within the existing fleet that have reached the end of their useful life and vehicles to implement the new service. This includes purchasing one trolley for the Downtown Trolley and two buses for the Pensacola-Navarre Express.
- Vehicles are assumed to cost \$350,000 for a mid-size 29-passenger bus, \$100,000 for a smaller 22-passenger bus, and \$218,000 for a trolley. The vehicle unit costs are based on information provided by ECAT.
- An annual growth rate of 3% was used for capital cost projections, based on the data available from recent transit plans in Florida and data published by FDOT.
- Unused Section 5311 funds allocated to Santa Rosa County are assumed to be available to fund proposed improvements that also serve this area. For the first four years (2017–2021), it is assumed that \$10,000 of this revenue will be allocated annually to improving bus stop infrastructure and \$45,000 will be allocated annually to develop new park-and-ride lots. Starting in 2021, this funding source will transition to offset local revenue required for operating the new Pensacola-Navarre Express, which also serves Santa Rosa County. Since Section 5311 funds are intended for non-urbanized areas, there may be limitations on where these funds can be used for various bus stop and park-and-ride improvements.

Figure 9-1 illustrates the operating and capital costs included in the 10-year Cost Feasible Plan.

Figure 9-1: Annual Operating and Capital Costs (millions)

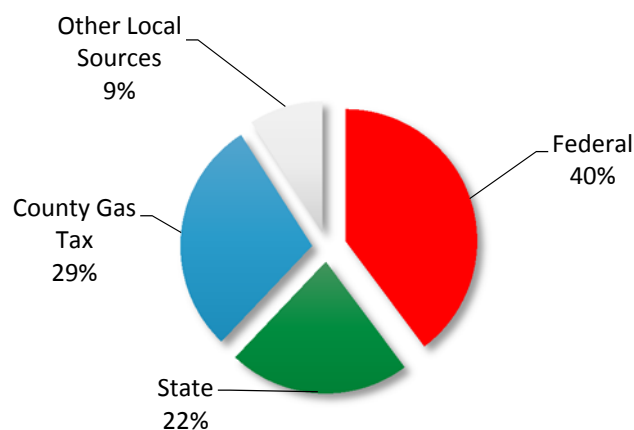


Revenue Assumptions

Revenues for fixed-route service are based on information from a number of State and local agencies and assumptions for different revenue sources, including the following:

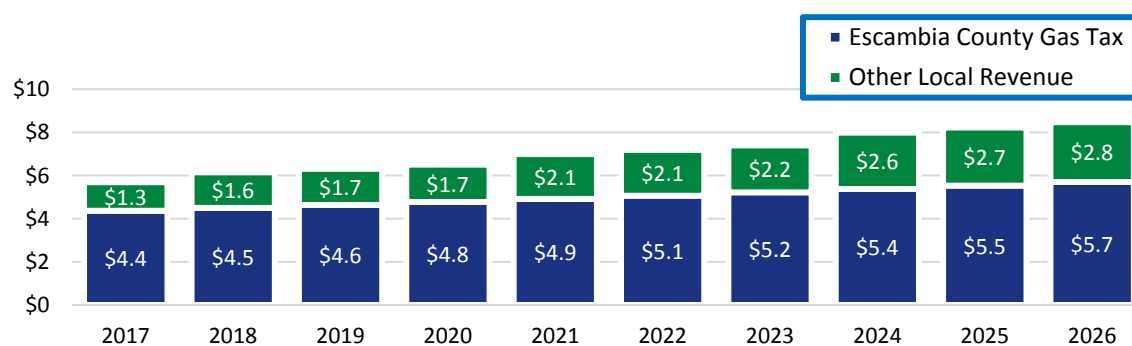
- Annual revenues from federal, state, and local sources are based on ECAT's FY 2017 budget, approved by the Escambia County BCC, and discussions with ECAT staff. The distribution of 10-year revenues included in the 10-year Cost Feasible Plan are shown in Figure 9-2.

Figure 9-2: Local Revenues



- Figure 9-3 illustrates the total revenue by source included in the 10-year Cost Feasible Plan. The "Other Local Revenue" category includes Escambia County's non-gas tax contribution for vehicle maintenance, fare and advertising revenue, and other contributions for the beach, UWF, and juror trolley routes. Under this Plan, no new Escambia County revenues are needed.

Figure 9-3: Cost Feasible Plan with Local Revenues (millions)



- An annual growth rate of 3% was used to increase all revenues beyond FY 2017.
- Federal grant funds are assumed to fund the purchase of vehicles needed for new service and the replacement of existing vehicles as needed over the next 10 years.

- FDOT Strategic Intermodal System (SIS) funds are assumed for the new Downtown Intermodal Facility.
- FTA Section 5339/State of Good Repair Program funds with a 20% local match from Florida toll revenue credit revenue are assumed to fund the new ECAT Operations and Maintenance Facility.
- New service for the Downtown Trolley is assumed to be funded by fare revenue and contributions from the City of Pensacola. New service for the Pensacola-Navarre Express is assumed to be funded by fare revenue, FDOT Service Development Program funds (for the first three years), Santa Rosa County excess Section 5311 funds, and contributions from Santa Rosa County.
- Projected fare revenue for new services are calculated using historical validated farebox recovery ratio data available from the National Transit Database (NTD). The three year historical farebox recovery ratio for ECAT's fixed-route service is 21.3%. Since the farebox recovery ratio represents a system average, to be conservative, the estimated fare revenue generated by new transit service is assumed to gradually approach the system-wide average ratio average over time, based on the type of service and area served.

The detailed 10-year Cost Feasible Plan is presented in Table 9-1.

10-Year Implementation Plan and Unfunded Needs

The implementation plan in Table 9-2 outlines improvements that are included in the Cost-Efficient Plan from 2017 through 2026 (presented previously in Table 9-1), as well as unfunded needs for FDOT's transportation deficiency assessments. The table also shows the implementation years, the operating and capital costs associated with each improvement, and whether existing or new revenues are anticipated to fund the improvement. It is important to emphasize that the schedule shown in the table does not preclude the opportunity to delay or advance any projects. As priorities change, funding assumptions do not materialize, or more funding becomes available, this project implementation schedule should be adjusted.

Table 9-1: 10-Year Costs and Revenues

Cost/Revenue	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	10-Year Total
Operating Costs											
Maintain Existing Fixed-Route	\$10,027,435	\$10,328,258	\$10,638,106	\$10,957,249	\$11,285,966	\$11,624,545	\$11,973,282	\$12,332,480	\$12,702,455	\$13,083,528	\$114,953,305
Maintain Paratransit	\$2,687,565	\$2,768,192	\$2,851,238	\$2,936,775	\$3,024,878	\$3,115,624	\$3,209,093	\$3,305,366	\$3,404,527	\$3,506,663	\$30,809,921
New/Local Express Service	\$0	\$317,223	\$326,740	\$336,542	\$1,097,687	\$1,130,618	\$1,164,537	\$1,199,473	\$1,235,457	\$1,272,521	\$8,080,797
Total Operating Cost	\$12,715,000	\$13,413,673	\$13,816,083	\$14,230,566	\$15,408,532	\$15,870,788	\$16,346,912	\$16,837,319	\$17,342,439	\$17,862,712	\$153,844,023
Capital Costs											
Vehicles											
Replacement Buses (Existing Service)	\$1,050,000	\$1,081,500	\$742,630	\$1,147,363	\$393,928	\$3,651,713	\$394,037	\$1,697,226	\$1,469,453	\$0	\$11,627,851
Replacement Paratransit Vehicles (Existing Service)	\$0	\$309,000	\$0	\$1,420,545	\$450,204	\$0	\$0	\$0	\$0	\$0	\$2,179,749
Replacement of Support Vehicles	\$100,000	\$103,000	\$53,045	\$54,636	\$0	\$0	\$0	\$0	\$0	\$0	\$310,681
Vehicles for New Transit Service	\$0	\$224,540	\$0	\$0	\$787,856	\$0	\$0	\$0	\$0	\$0	\$1,012,396
Other Capital/Infrastructure											
ECAT Operating and Maintenance Facility	\$0	\$0	\$0	\$0	\$0	\$0	\$20,000,000	\$0	\$0	\$0	\$20,000,000
Downtown Intermodal Facility	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4,000,000	\$0	\$0	\$4,000,000
Park-and-Rides Lots	\$45,000	\$46,350	\$47,741	\$49,173	\$0	\$0	\$0	\$0	\$0	\$0	\$188,263
Bus Stop Infrastructure Program	\$10,000	\$10,300	\$10,609	\$10,927	\$0	\$0	\$0	\$0	\$0	\$0	\$41,836
Security	\$30,000	\$30,900	\$31,827	\$32,782	\$33,765	\$34,778	\$35,822	\$36,896	\$38,003	\$39,143	\$343,916
Amenities	\$230,000	\$185,400	\$41,200	\$42,436	\$43,709	\$45,020	\$46,371	\$47,762	\$49,195	\$50,671	\$781,764
Expand Employee Parking	\$250,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$250,000
Air Conditioning - Facility	\$200,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$200,000
Bathrooms - Facility	\$0	\$0	\$318,270	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$318,270
Computers / Software	\$10,000	\$10,300	\$10,609	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$30,909
Total Capital Cost	\$1,925,000	\$2,001,290	\$1,255,931	\$2,757,863	\$1,709,462	\$3,731,512	\$20,476,230	\$5,781,884	\$1,556,651	\$89,814	\$41,285,637
Revenues											
Federal Grants	\$4,543,000	\$4,903,830	\$4,819,669	\$4,964,259	\$5,901,043	\$5,266,582	\$5,424,580	\$5,587,317	\$5,754,936	\$5,927,585	\$53,092,800
Section 5339/State of Good Repair (ECAT O&M Facility)	\$0	\$0	\$0	\$0	\$0	\$0	\$16,000,000	\$0	\$0	\$0	\$16,000,000
State Grants	\$2,935,000	\$3,023,050	\$3,113,742	\$3,207,154	\$3,658,868	\$3,756,259	\$3,860,449	\$3,609,680	\$3,717,970	\$3,829,509	\$34,711,680
FL Toll Revenue Credit Match (ECAT O&M Facility)	\$0	\$0	\$0	\$0	\$0	\$0	\$4,000,000	\$0	\$0	\$0	\$4,000,000
FDOT SIS Funds (Downtown Intermodal Facility)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4,000,000	\$0	\$0	\$4,000,000
Escambia County Gas Tax	\$4,370,000	\$4,501,100	\$4,636,133	\$4,775,217	\$4,918,473	\$5,066,028	\$5,218,009	\$5,374,549	\$5,535,785	\$5,701,859	\$50,097,153
Fare Revenue	\$1,292,017	\$1,364,550	\$1,422,851	\$1,465,477	\$1,549,431	\$1,620,605	\$1,686,159	\$1,736,684	\$1,788,725	\$1,842,327	\$15,768,828
Other Local Sources	\$1,322,000	\$1,645,051	\$1,676,979	\$1,727,289	\$2,072,704	\$2,122,510	\$2,177,688	\$2,609,601	\$2,687,889	\$2,768,525	\$20,810,236
Total Revenue	\$14,462,017	\$15,437,582	\$15,669,373	\$16,139,395	\$18,100,520	\$17,831,984	\$38,366,884	\$22,917,831	\$19,485,306	\$20,069,805	\$198,480,696
10-Year Cost Feasible Plan											
Total Revenue	\$14,462,017	\$15,437,582	\$15,669,373	\$16,139,395	\$18,100,520	\$17,831,984	\$38,366,884	\$22,917,831	\$19,485,306	\$20,069,805	\$198,480,696
Total Cost	\$14,640,000	\$15,414,963	\$15,072,014	\$16,988,428	\$17,117,994	\$19,602,300	\$36,823,141	\$22,619,203	\$18,899,090	\$17,952,526	\$195,129,659
Rollover from Prev. Year	\$0	-\$177,983	-\$155,364	\$441,996	-\$407,038	\$575,488	-\$1,194,828	\$348,914	\$647,542	\$1,233,758	
Surplus/(Shortfall)	(\$177,983)	(\$155,364)	\$441,996	(\$407,038)	\$575,488	(\$1,194,828)	\$348,914	\$647,542	\$1,233,758	\$3,351,037	\$3,351,037

Table 9-2: Connections 2026 Implementation Plan

Improvement	Implementation Year	Annual Operating Cost	Total Capital Cost	Existing or New Revenues
		(2016\$)	(2016\$)	
Maintain Existing Service				
Maintain Existing Fixed-Route Service	2017-2026	\$10,027,435	\$9,450,000	Existing
Maintain Existing Paratransit Service	2017-2026	\$2,687,565	\$2,000,000	Existing
Improvements to Existing Routes				
Extend Route 47	2017-2026	\$0	\$0	N/A
Double Weekday Frequency on Routes 1, 2, 32, 43, 52, 55	Unfunded	\$2,480,978	\$6,300,000	New
Add Later Weekday Service to 10 pm on all Routes	Unfunded	\$1,850,382	\$0	New
Double Saturday Frequency on Existing Routes	Unfunded	\$887,591	\$11,200,000	New
Add Sunday Service on Routes 2, 32, 45, 52, 55	Unfunded	\$421,339	\$2,100,000	New
New Service Expansion				
Fixed-Routes				
Downtown Trolley	2018	\$307,984	\$218,000	New
Pensacola-Navarre Express	2021	\$667,298	\$700,000	New
Navy Federal Connector	Unfunded	\$333,649	\$350,000	New
Pensacola-Milton Limited Express	Unfunded	\$667,298	\$700,000	New
Navy Federal–Downtown Express	Unfunded	\$222,433	\$700,000	New
Orange Beach-Perdido Key Limited Express	Unfunded	\$667,298	\$700,000	New
Pensacola-Perdido Key Fixed Route	Unfunded	\$333,649	\$350,000	New
ADA service for Navy Federal Connector	Unfunded	\$307,984	\$200,000	New
ADA service for Pensacola-Perdido Key Fixed Route	Unfunded	\$307,984	\$100,000	New
Flex Routes				
Cantonment Flex	Unfunded	\$307,984	\$100,000	New
Milton Flex	Unfunded	\$307,984	\$100,000	New
Gulf Beach Highway Flex	Unfunded	\$307,984	\$100,000	New
Capital/Infrastructure Improvements				
Support Vehicles	2017-2020	N/A	\$300,000	Existing /New
Park-and-Rides Lots	2017-2020	TBD	\$180,000	New
Bus Stop Infrastructure Program	2017-2021	N/A	\$40,000	New
ECAT Operating and Maintenance Facility	2023	TBD	\$20,000,000	New
Downtown Intermodal Facility	2024	TBD	\$4,000,000	New
Security	2017-2020	N/A	\$300,000	Existing /New
Amenities	2017-2020	N/A	\$730,000	Existing /New
Expand Employee Parking	2017	N/A	\$250,000	Existing /New
Air Conditioning - Facility	2017	N/A	\$200,000	Existing /New
Bathrooms- Facility	2019	N/A	\$300,000	Existing /New
Computer/Software	2017-2019	N/A	\$30,000	Existing /New
Transit Signal Priority (TSP)	Unfunded	TBD		New
Other Improvements				
Shared Park-and-Ride Lot Agreements	2017-2026	TBD	\$0	Existing
Partnership to Establish Water Ferry Connections	2017-2026	N/A		N/A
Transportation Demand Management (TDM) Strategies	2017-2026	TBD		New
Land Development Regulations	2017-2026	N/A		N/A
Partnerships with Ridesourcing Companies	2017-2026	TBD		TBD
Route-level Performance Monitoring Program	2017-2026	TBD		TBD
Evaluate Existing ECAT Fixed-Route Fare Structure/Policy	2017-2026	TBD		TBD
Ride Voucher Programs	2017-2026	TBD		New
Study Connection Service to Water Ferry	2017-2026	TBD		New
Evaluate Implementing Transit Signal Priority	2017-2026	TBD		New

Appendix A:

Farebox Recovery Ratio Report

ANNUAL FAREBOX RECOVERY RATIO REPORT 2016
ECAT FIXED-ROUTE BUS SYSTEM, ESCAMBIA COUNTY, FLORIDA
August 2016

CURRENT FAREBOX RECOVERY RATIO

Farebox recovery (ratio) refers to the percent of the transit system's total operating expenses that are funded with fares paid by passengers and is calculated by dividing the total fare revenue collected by the total operating expenses. This value is reported by transit agencies to the National Transit Database using a standardized equation, as required for FTA grant recipients. The farebox recovery ratio for ECAT, the public transportation provider for Escambia County, was 20.4% FY 2014. The background with regards to the farebox recovery ratio includes the following.

PRIOR YEAR FARE STUDIES AND CHANGES

Starting in 1971, Escambia County assumed operations of the transit system after several changes in private ownership. The fare structure has not changed since 2007.

PROPOSED FARE CHANGES FOR THE UPCOMING YEARS

ECAT does not have major plans underway to change the fare structure. Whenever the fare structure is changed monetarily, it will require a long, public participation process. Short-term goals are to combine the Disabled Pass and the Senior Pass, reduce the cost of the Day pass, and eliminate the 7-Day pass. Long-term alternatives were to eliminate transfers and use reloadable smart-card passes available at various ticket vending machines.

STRATEGIES THAT WILL AFFECT THE FAREBOX RECOVERY RATIO

The following is a list of strategies ECAT will employ to improve the farebox recovery ratio:

1. Determine most cost-effective service type on all major corridors, given demand, routings, and coverage areas.
2. Increase ridership by increasing average frequency and improving fare collection options and fare media accessibility for riders.
3. Increase ridership by transitioning paratransit service patrons to fixed-route service.
4. Minimize costs required to operate and administer transportation services.
5. Continuously monitor performance to determine if adjustments need to be made.
6. Conduct bus on-board surveys to gather valuable information on how to make services more convenient and useful to patrons.
7. Strive to increase ridership by enhancing marketing activities.

Appendix B:

Trend and Peer System Analysis

ECAT Trend and Peer Systems Analysis

In conjunction with the trend analysis, a peer review analysis was conducted to compare various ECAT fixed-route performance characteristics to a group of transit peers. The trend and peer review analyses are organized by the type of measure or indicator and include statistics, figures, and tables to illustrate ECAT's performance over the past five years and how ECAT compares to selected peers. The selection process for the peer review is described first, followed by a presentation of highlights from the trend and peer review analyses. Summary results are provided at the conclusion of this section. A similar peer review and trend analysis was also conducted for ECAT's complementary paratransit service at a reduced scale.

General Performance Measures

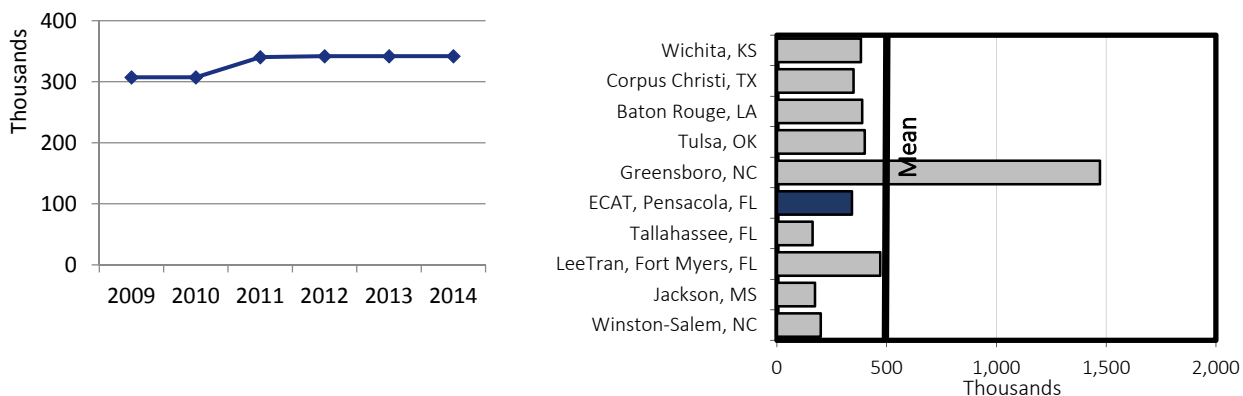
General performance indicators are used to gauge the overall system operating performance. Figures B-1 through Figure B-10 present the performance indicators of ECAT from FY 2009 through FY 2014 (trend analysis) as well its performance relative to the selected peer systems (peer analysis). Performance measures listed in Table B-2 with missing data were excluded from this section.

Service Area Population

Service area population and density are a measure of potential demand for service and are determined using a $\frac{3}{4}$ -mile buffer from the service. Most agencies do not update this figure on an annual basis and, therefore, it remains unchanged in Escambia County for certain fiscal years.

Based on the NTD data, the Escambia County service area population increased from 307,220 in 2009 to 341,765 in 2014, an 11.2% increase. The service area population for Escambia County service is nearly 21.2% below the peer group mean, a value that is skewed by the high service area population reported by the Greensboro, North Carolina, agency. The reported service area population for ECAT increased an average of 1.9% per year.

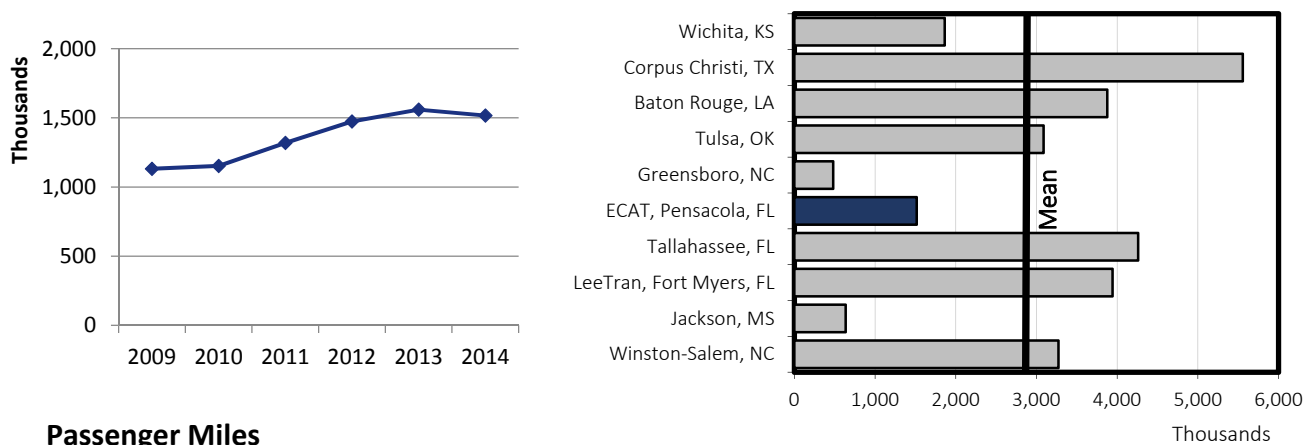
Figure B-1: ECAT Trend and Peer Comparison for Service Area Population



Passenger Trips (Ridership)

Passenger trips, also known as ridership, is the number of passengers who board the public transit vehicles. Passengers are counted each time they board the vehicles, no matter how many vehicles to which they transfer. It is a measure of the market demands for the service. The total number of passenger trips in Escambia County increased from approximately 1.13 million in 2009 to 1.52 million in 2014, a 34% increase, a rate that is markedly higher than the population growth during the same time period. ECAT placed 47% below the peer mean of 2.8 million.

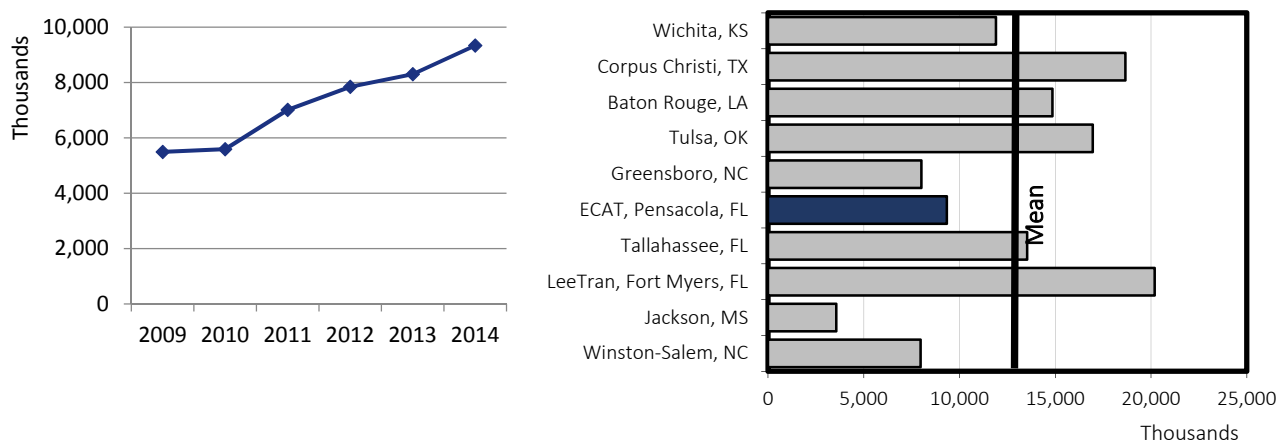
Figure B-2: ECAT Trend and Peer Comparison for Passenger Trips



Passenger Miles

Passenger miles is a measure that multiplies the number of passenger trips by the average passenger trip length to estimate the total number of miles passengers travel. The average passenger trip length is usually determined by survey sampling. For ECAT, passenger miles have continuously increased, from 5.5 million miles in 2009 to 9.3 million miles in 2014, an increase of 70.1%. ECAT ranks the third lowest among its peer systems at 28% below the peer mean.

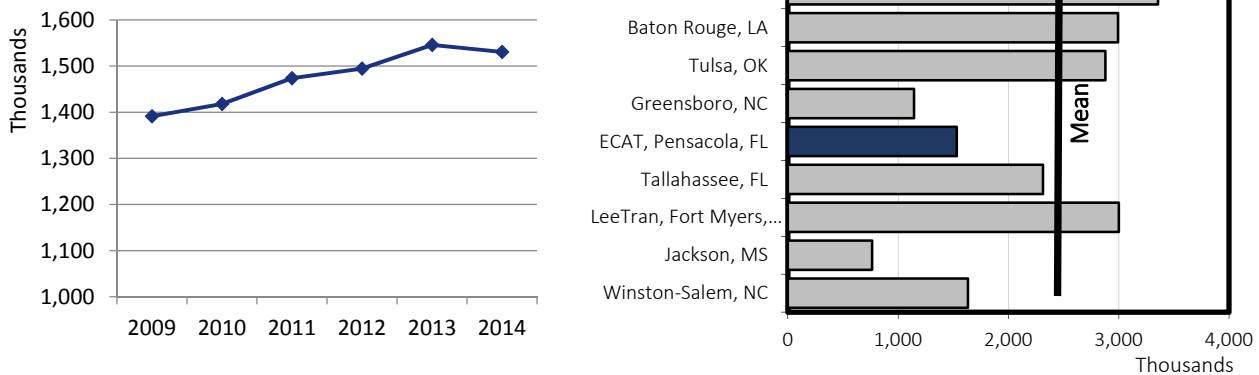
Figure B-3: ECAT Trend and Peer Comparison for Passenger Miles



Vehicle Miles

Vehicle miles is the miles that the transit vehicles travel while in revenue service plus deadhead miles. This is a measure of how much service coverage is provided or the supply of service. ECAT's total vehicle miles of service increased 10% overall, from 1.4 million miles in 2009 to 1.5 million miles in 2014. Similar to the performance measure of passenger miles, ECAT ranked third lowest among its peer systems, at 28% below the peer mean.

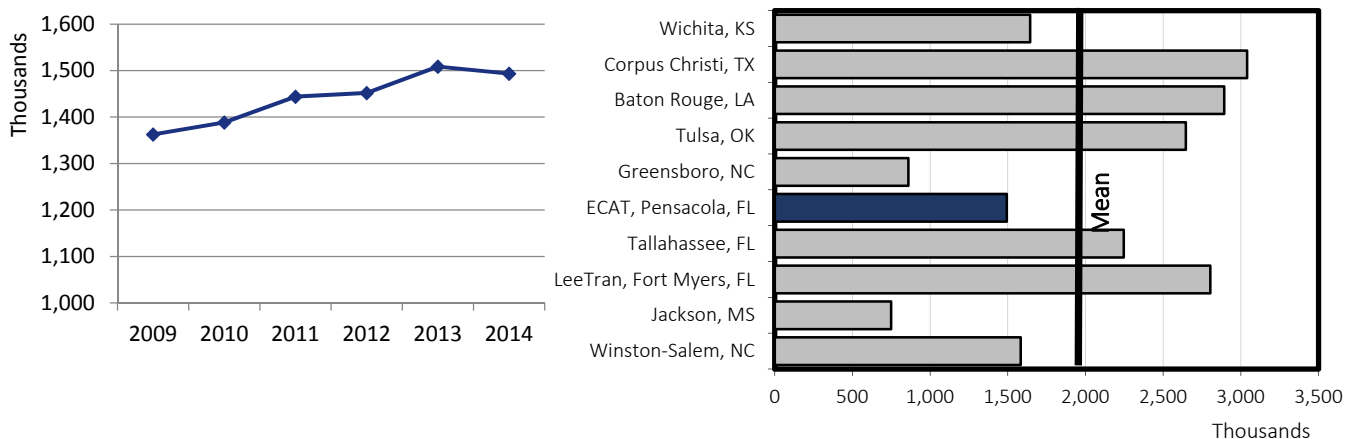
Figure B-4: ECAT Trend and Peer Comparison for Vehicle Miles



Revenue Miles

Revenue miles is the total number of miles that the public transit service is scheduled for or actually operated while in revenue service. They exclude miles traveled when passengers are not on board (deadhead travel), training operations, and charter services. Revenue miles increasing faster than total vehicle miles generally indicates a positive operational trend and points to a decreasing proportion of deadhead miles over time relative to total miles. ECAT experienced a continuous increase of revenue miles of 9.6% between 2009 and 2014.

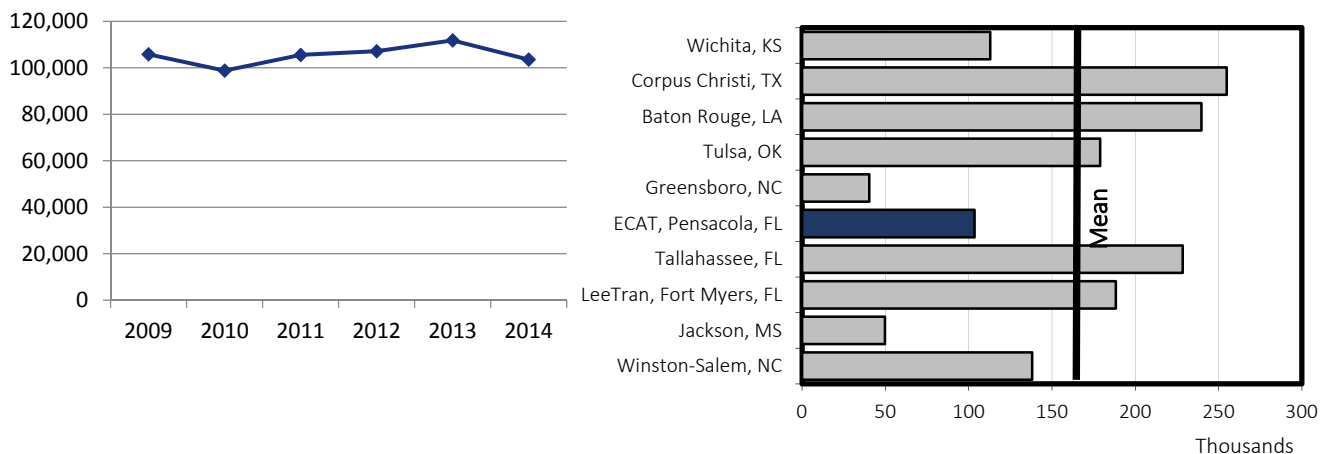
Figure B-5: ECAT Trend and Peer Comparison for Revenue Miles



Vehicle Hours

Vehicle hours is the total miles of travel of a transit vehicle, including both revenue service and deadhead travel. ECAT has consistently maintained similar vehicle hours annually, with a 2.2% decrease in vehicle hours from 2009 to 2014.

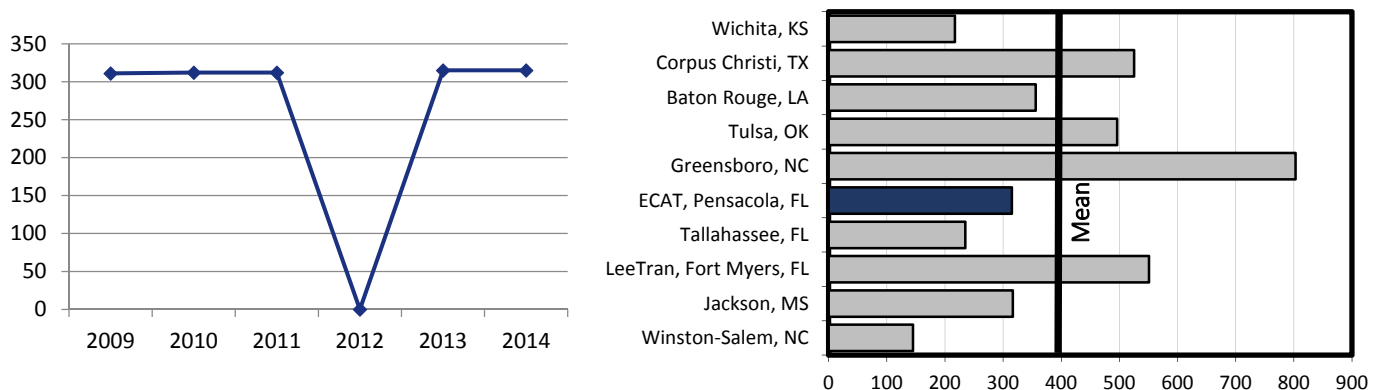
Figure B-6: ECAT Trend and Peer Comparison for Vehicle Hours



Route Miles

Routes miles is the total length of service routes in use, including both revenue and deadhead travel. Route miles for ECAT were not reported for the year 2012. Route miles have increased from 311 miles in 2009 to 315 miles in 2014, indicating that service continues to increase. ECAT is 21% below the peer mean of 396 route miles.

Figure B-7: ECAT Trend and Peer Comparison for Route Miles

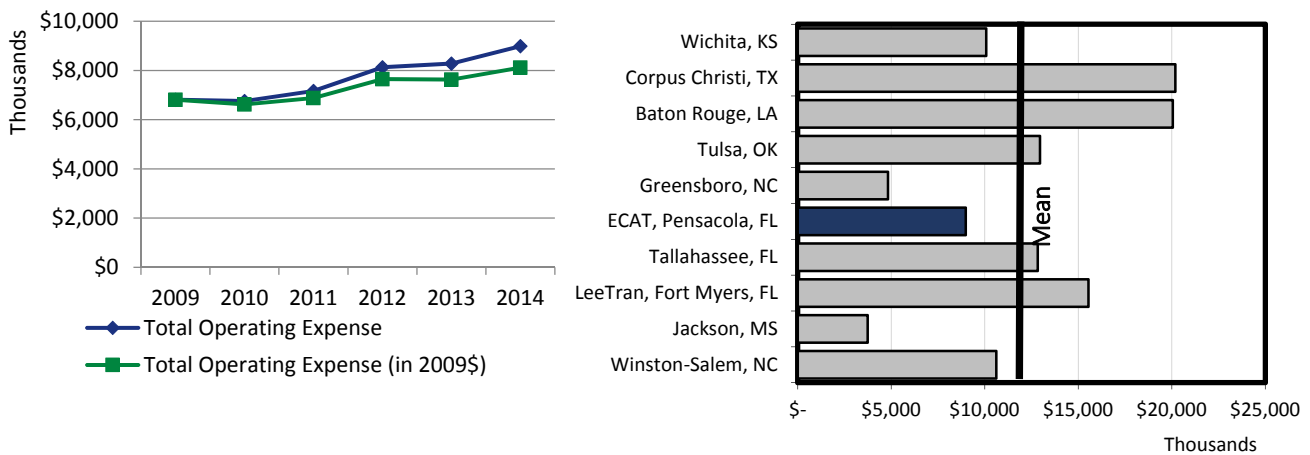


Note: No ECAT data available for 2012.

Total Operating Expense

Total operating expense includes all costs associated with operating the transit agency (i.e., vehicle operations, maintenance, and administrative costs). ECAT's total operating expense increased from \$6.8 million in 2009 to \$9.0 million in 2014, or 32%. However, when taking into consideration inflation, the actual total operating expense measured in 2009 dollars increased by 19% during this five-year period. This indicates that overall operating expenses increased annually. The total operating expense for ECAT is approximately 25% less than the peer group mean.

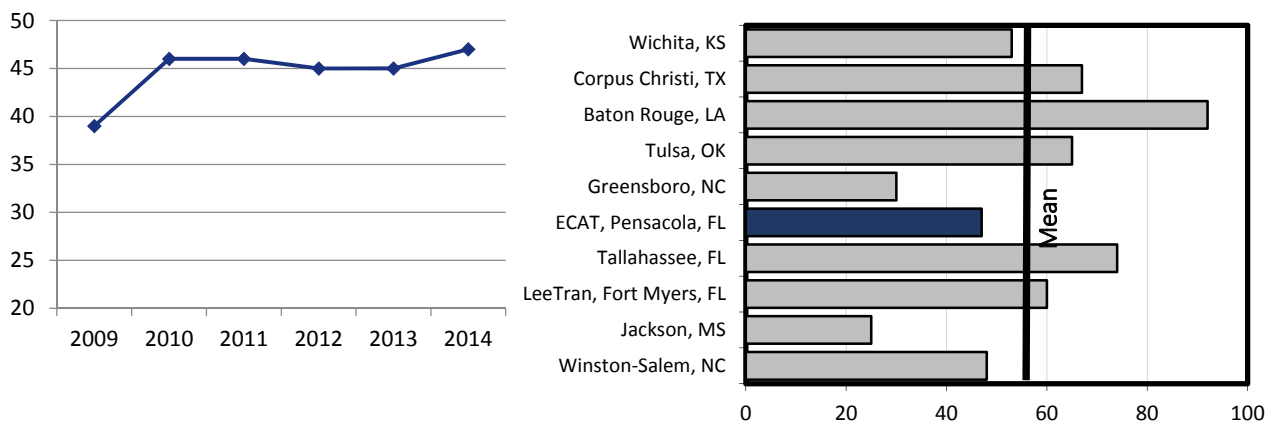
Figure B-8: ECAT Trend and Peer Comparison for Total Operating Expense



Vehicles Available for Maximum Service

Vehicles available for maximum service is an indication of the the supply of service. ECAT has increased its supply of vehicles available for maximum service from 39 vehicles in 2009 to 47 vehicles in 2014, a 20% increase in fleet size. ECAT is 16.2% below the peer mean of 56 vehicles.

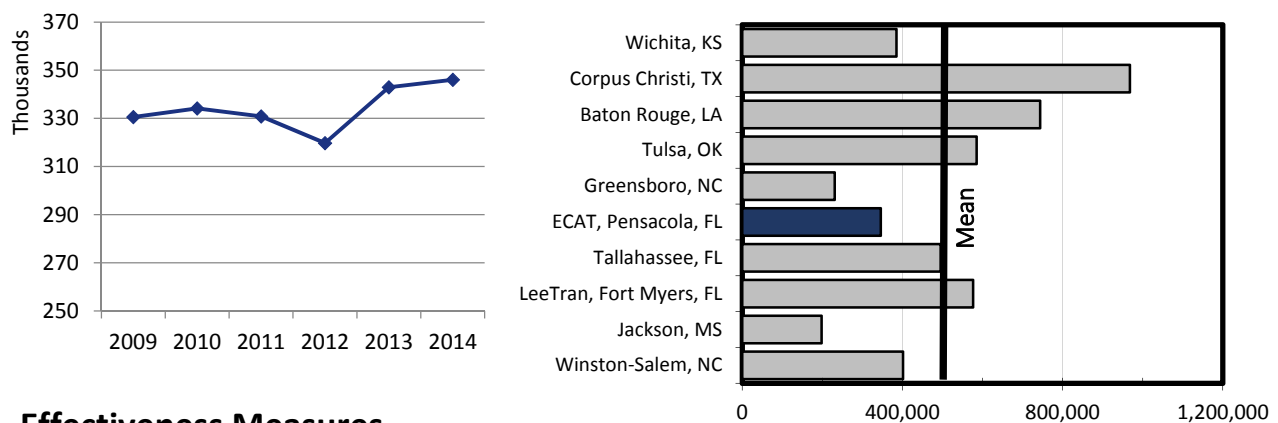
Figure B-9: ECAT Trend and Peer Comparison for Vehicles Available for Maximum Service



Total Gallons Consumed

ECAT's gas consumption has fluctuated somewhat since 2009 but increased overall by only 4.7% in the five-year period. Similar to the other general performance measures, ECAT remains below the peer mean by approximately 30%.

Figure B-10: ECAT Trend and Peer Comparison for Total Gallons Consumed



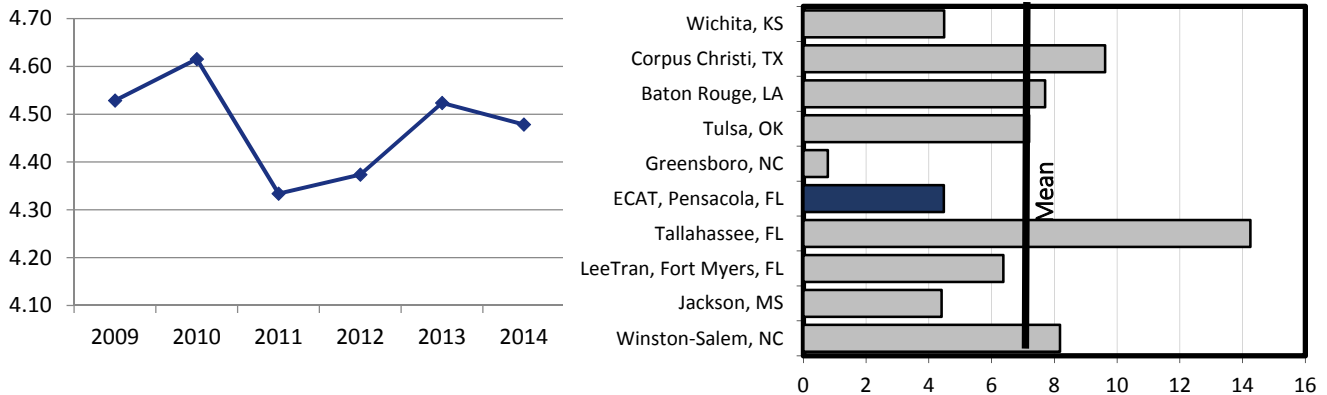
Effectiveness Measures

Effectiveness measures indicate the extent to which service-related goals are being met. Effectiveness measures include service supply, service consumption, and quality of service and are represented by variables such as vehicle miles per capita, passenger trips per revenue hour, and average age of fleet. Figures B-11 through B-15 present the trend and peer analysis for these effectiveness performance indicators. Performance measures listed in Table 5-2 with missing data were excluded from this section.

Vehicle Miles Per Capita

Vehicle miles per capita is derived from the total system vehicle miles and service area population within a $\frac{3}{4}$ -mile distance of service provided. It measures the supply of service provided based on the demand within the service area. For ECAT, vehicle miles per capita experienced a drop, from a high of 4.62 miles per capita in 2010 to 4.33 miles per capita in 2011, but overall during the five-year period, the miles per capita slightly decreased, by 1.1%. On an annual basis, the miles per capita fluctuated, indicating no evident trend. Vehicle miles per capita for ECAT are 34% below the peer group mean, an indication that the supply of service is less than what is typically experienced by peer agencies.

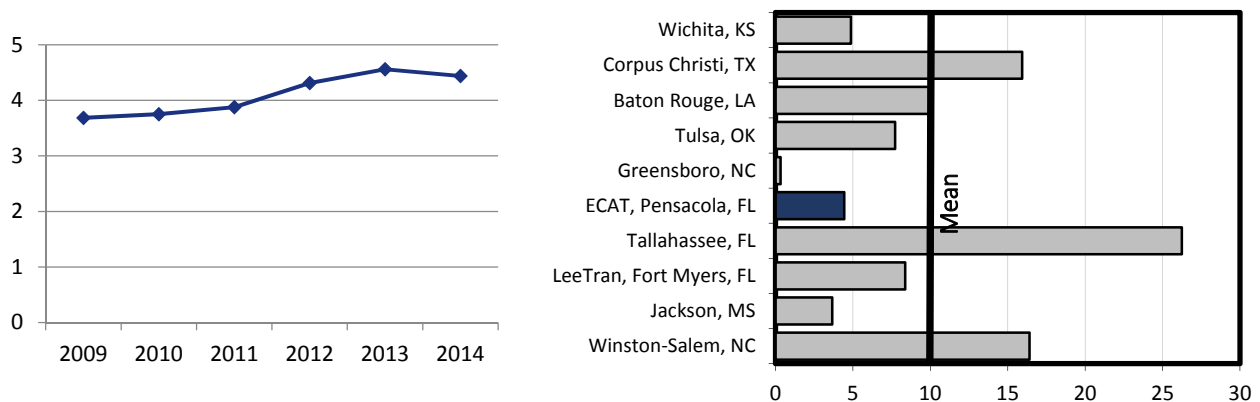
Figure B-11: ECAT Trend and Peer Comparison for Vehicle Miles Per Capita



Passenger Trips Per Capita

Passenger trips per capita is calculated by dividing the total transit boardings by service area population. This measure of service effectiveness quantifies transit utilization within the service area. Passenger trips per capita in Escambia County experienced little variation between 2009 and 2014. However, ECAT ranks third to last when compared to its peer systems, at 54.7% below the peer mean, indicating a potential to improve in this measure.

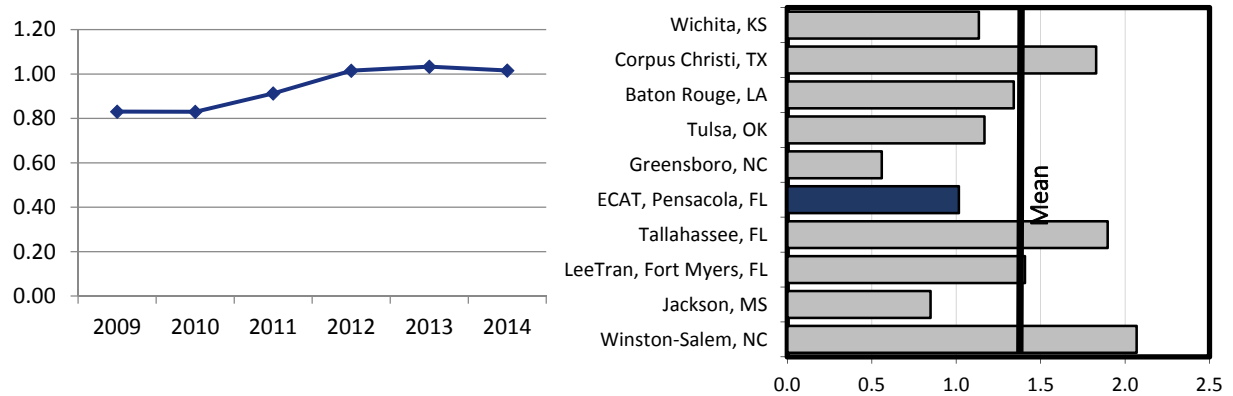
Figure B-12: ECAT Trend and Peer Comparison for Passenger Trips Per Capita



Passenger Trips per Revenue Mile

Passenger trips per revenue mile is calculated by dividing transit boardings by revenue miles. It is a measure of the supply of revenue service provided based on the level of demand. In Escambia County, passenger trips per revenue mile experienced an increase of 21% during the five-year period, indicating that the system was achieving better ridership productivity between 2009 and 2014. However, when compared to its peer systems, ECAT places third to last, at almost 23.4% below the peer mean, indicating that there is room for improvement in this effectiveness measure.

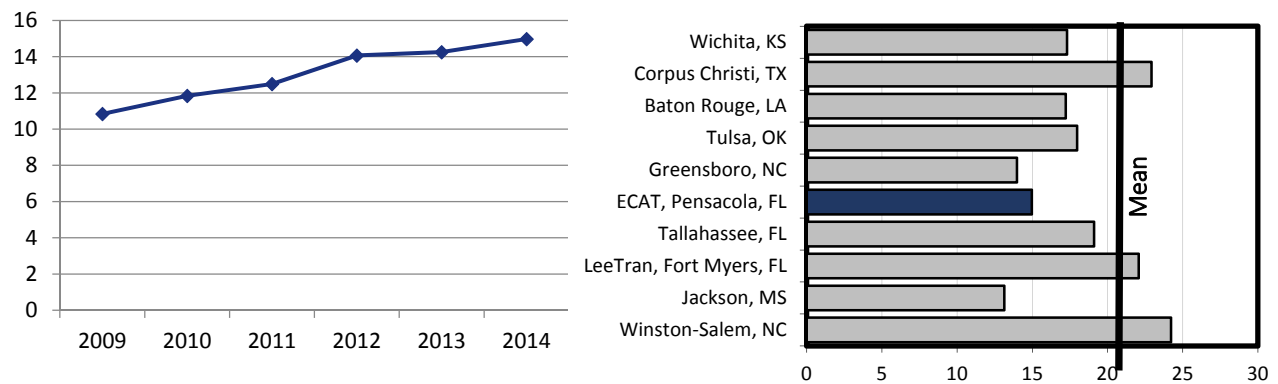
Figure B-13: ECAT Trend and Peer Comparison for Passenger Trips per Revenue Mile



Passenger Trips per Revenue Hour

Passenger trips per revenue hour is a measure used to quantify service consumption and can help evaluate the amount of resources consumed in providing service. From 2009 to 2014, ECAT's passenger trips per revenue hour increased 38.1% overall. This indicates the system was achieving improved ridership productivity during this five-year period. Despite this improvement, ECAT ranks third to last among its peer systems, at nearly 18.2% below the peer mean.

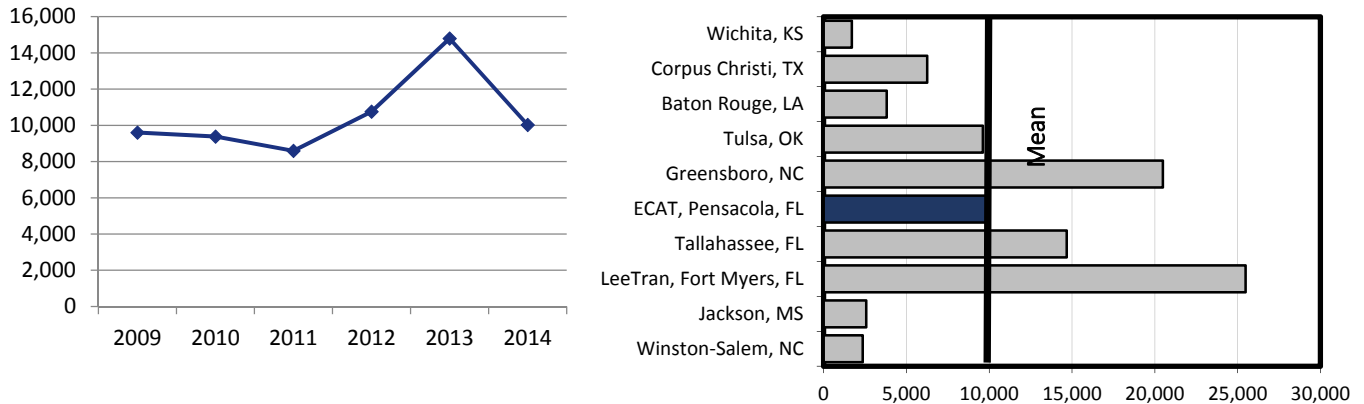
Figure B-14: ECAT Trend and Peer Comparison for Passenger Trips per Revenue Hour



Revenue Miles between Vehicle Failures

Revenue miles between vehicle failures reflects quality of maintenance as well as loss in revenue due to vehicle operational failures and service shortages. A higher number of revenue miles between system failures can indicate a higher quality of passenger experience. For ECAT, this effectiveness measure peaked to a value of 14,789 revenue miles per road call in 2013 and significantly declined afterwards to 10,023 miles per road call in 2014, suggesting a recent decline in effective service per person for transit services in Escambia County. Compared to peer systems, ECAT's revenue miles between vehicle failures statistic places almost exactly at the peer mean.

Figure B-15: ECAT Trend and Peer Comparison for Revenue Miles between Vehicle Failures



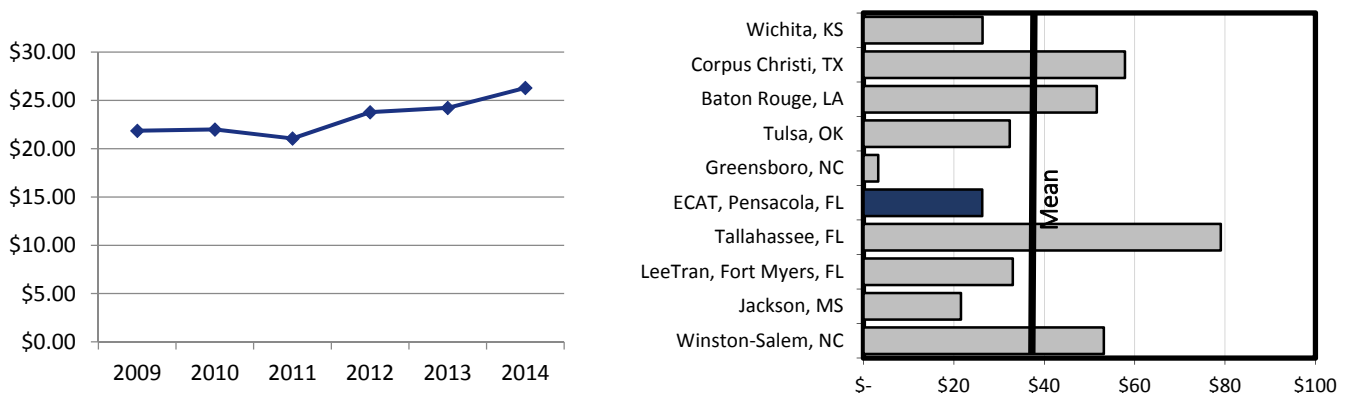
Efficiency Measures

Efficiency measures focus on costs and other measures of efficiency. Figures B-16 through B-24 present the efficiency measures for ECATs peer review and trend analysis. Similarities between ECAT and the peers in this category may be related to the peer selection process, which is largely based on transit service characteristics. The following summarizes the trend and peer analysis by efficiency measure type.

Operating Expense per Capita

Operating expense per passenger trip measures the efficiency of transporting riders, both on how service is delivered and the market demands for the service. When excluding inflation, the operating expense per passenger trip in Escambia County increased from \$21.85 in 2009 to \$26.29 in 2014, or 20.31% overall. ECAT ranks third to last, at 31.7% below the peer mean of \$38.46.

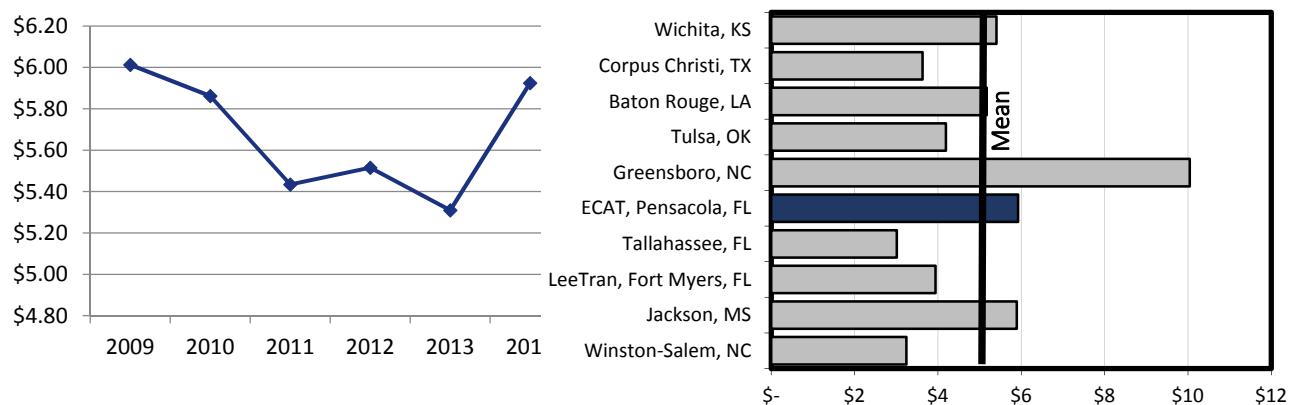
Figure B-16: ECAT Trend and Peer Comparison for Operating Expense per Capita



Operating Expense per Passenger Trip

Operating expense per passenger trip measures the efficiency of transporting riders, both on how service is delivered and the market demands for the service. The operating expense per passenger trip in Escambia County decreased from \$6.39 in 2009 to \$6.28 in 2013, or 1.7% overall. The operating expense per passenger trip has declined since peaking in 2010, suggesting efficiency improvements during this period. ECAT ranks close to the peer mean for this measure.

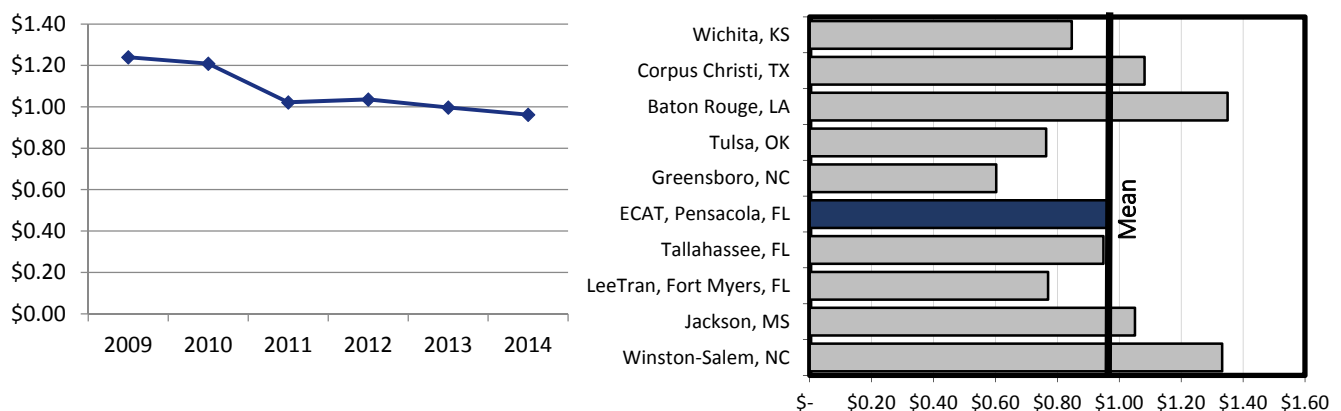
Figure B-17: ECAT Trend and Peer Comparison for Operating Expense per Passenger Trip



Operating Expense per Passenger Mile

Operating expense per passenger mile measures the impact of trip length on the system's performance. ECAT's operating expense per passenger mile experienced a gradual decline of 22.4% between 2009 and 2014. ECAT is nearly the same as the peer mean for this measure.

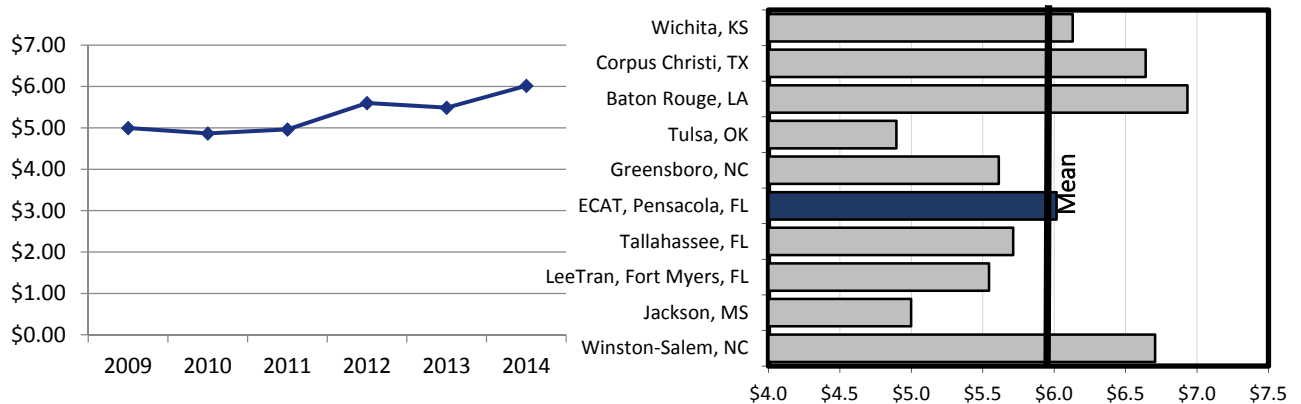
Figure B-18: ECAT Trend and Peer Comparison for Operating Expense per Passenger Mile



Operating Expense per Revenue Mile

Operating expense per revenue mile can indicate how efficiently a transit service is delivered. ECAT's operating expense has increased 20.4% overall between 2009 and 2014. In comparison to the peer systems, the operating expense per revenue mile for ECAT is nearly the same as the peer group mean.

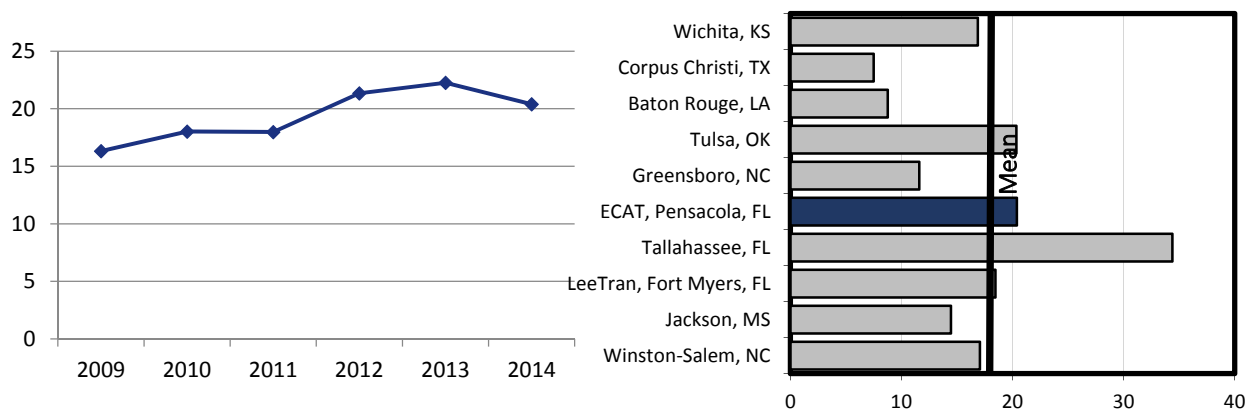
Figure B-19: ECAT Trend and Peer Comparison for Operating Expense per Revenue Mile



Farebox Recovery

Farebox recovery (ratio) refers to the percent of the transit system's total operating expenses that are funded with fares paid by passengers and is calculated by dividing the total fare revenue collected by the total operating expenses. ECAT's farebox recovery has improved from 16.3% in 2009 to 20.4% in 2014, or 25% over the five-year period. The farebox recovery for ECAT is approximately 20.1% below the peer group mean, indicating a potential for improvement in this performance measure.

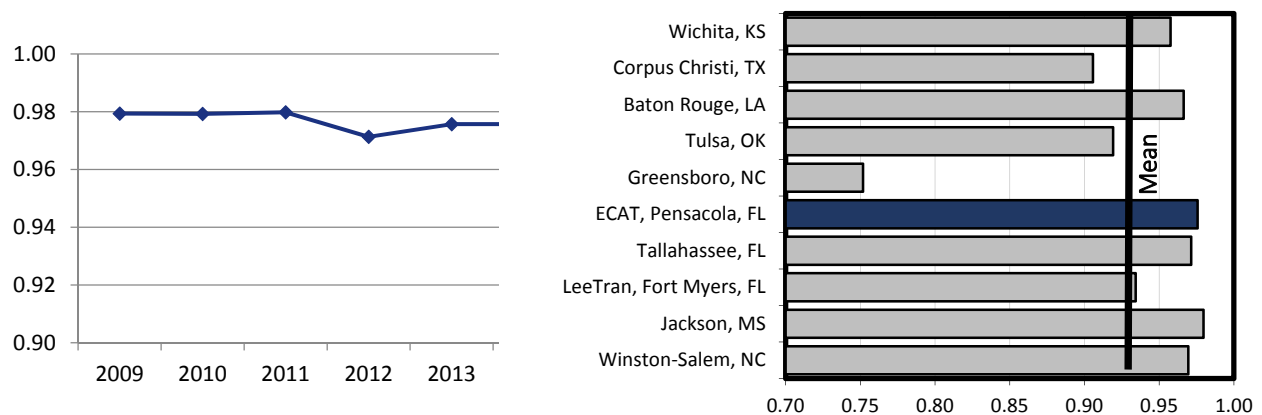
Figure B-20: ECAT Trend and Peer Comparison for Farebox Recovery (%)



Revenue Miles per Vehicle Mile

Revenue miles per vehicle miles is a measure of vehicle utilization. A higher ratio of revenue miles traveled to total vehicle mile generally indicates higher system productivity. For ECAT, the revenue mile per vehicle mile remained relatively stable, at 0.98 over the five-year period, with the exception in the year 2012, when revenue miles per vehicle mile dropped to 0.97 but returned to 0.98 in 2013. Revenue miles per vehicle mile for ECAT is 4.6% below the peer group mean, which indicates a close to average use of fixed-route bus vehicles within the peer group mean.

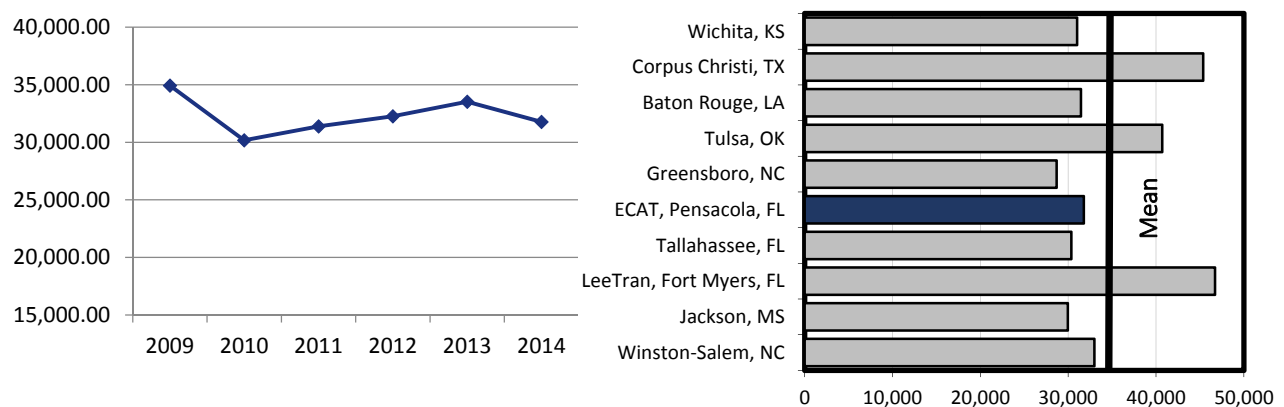
Figure B-21: ECAT Trend and Peer Comparison for Revenue Miles per Vehicle Mile



Revenue Miles per Total Vehicles

Revenue miles per total vehicles is another measure of vehicle utilization. ECAT's experienced an overall decrease of 9.1% over the five-year period. ECAT ranks close to the peer mean of 34,900 revenue miles per total vehicles.

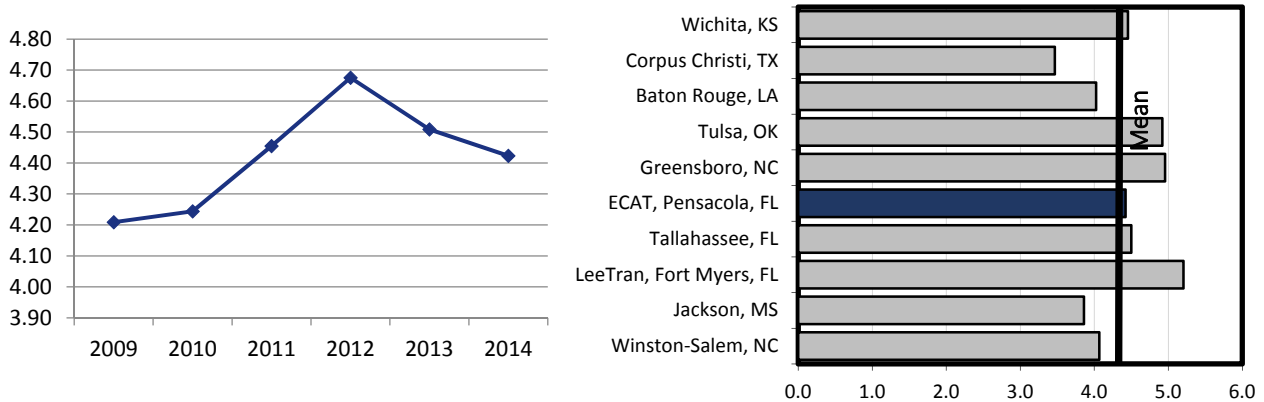
Figure B-22: ECAT Trend and Peer Comparison for Revenue Miles per Total Vehicles



Vehicle Miles per Gallon

Vehicle miles per gallon, or the ratio between fuel consumed and distance traveled, is an indication of fuel efficiency and applies only to diesel- and gasoline-powered vehicles. For ECAT, vehicle miles per gallon (or fuel efficiency) increased during the five-year period, from 4.2 in 2009 to 4.4 in 2014, or 5.1% overall.

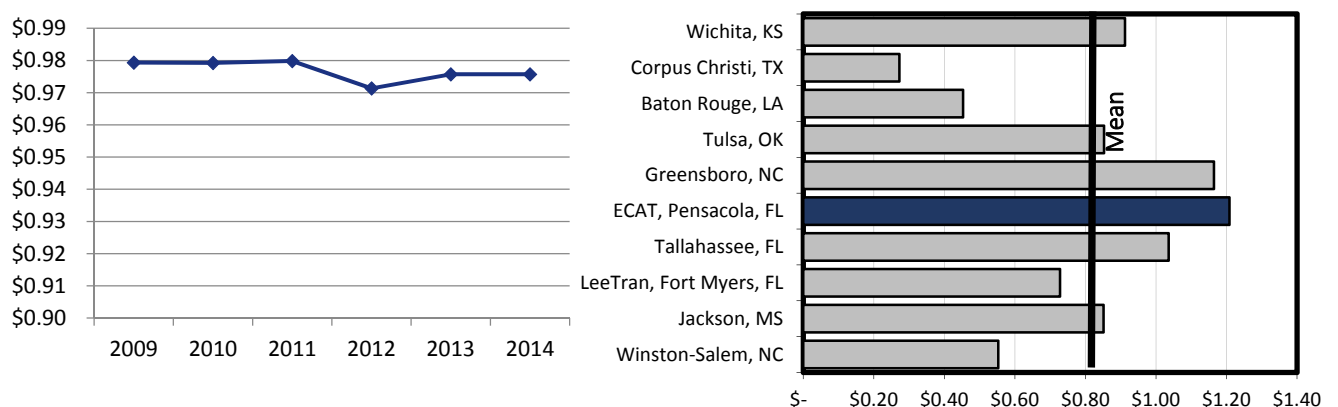
Figure B-23: ECAT Trend and Peer Comparison for Vehicle Miles per Gallon



Average Fare

Average fare is calculated by dividing total passenger fare revenue collected by ridership. The average can be lowered by systems such as ECAT that offer free transfers or discounted/free rides. ECAT's average fare increased from \$0.97 in 2009 to \$1.21 in 2014, or 24.9% overall. The mean average fare for the peers systems is \$0.80, which ranks ECAT's average fare at the highest compared to its peer systems.

Figure B-24: ECAT Trend and Peer Comparison for Average Fare



Summary Results of Fixed-Route Trend and Peer Analysis

As previously discussed, an analysis of ECAT's fixed-route bus service from 2009 through 2014 was conducted using the most recent six-year NTD data available. Although the trend analysis is only one aspect of an overall transit performance evaluation, when combined with the peer review analysis, the results provide a starting point for understanding the efficiency and effectiveness of a transit system.

Trend Analysis Summary

- **Service Supply** – Vehicle miles per capita (service supply) decreased by 1.1% by 2014, indicating that ECAT services decreased during the analysis period. However, the decrease of service supply resulted in increased ridership productivity, as manifested in service consumption.
- **Service Consumption** – Passenger trips per capita, per revenue mile, and per revenue hour have shown an increase over the six-year period. This trend indicates that the ECAT has been improving in system effectiveness over the last six years.
- **Quality of Service** – Although the number of system vehicle failures has increased over the six-year period, the revenue miles between failures has increased. This indicates that the system's service quality experienced a slight improvement during this period.
- **Cost Efficiency** – Operating expense per capita and per revenue mile experienced increased costs; however, operating costs per passenger mile decreased. This indicates that ECAT may be experiencing overall increased costs in operation.

Table B-3 summarizes the trend analysis of ECAT's existing fixed-route system in terms of the percent that each performance measure changed between 2009 and 2014.

Peer System Analysis Summary

The following summarizes the peer review analysis of performance indicators prepared for ECAT.

- **General Performance Measures** – ECAT consistently placed approximately 30% below the peer mean for most general performance measures (passenger trips, passenger miles, vehicle miles, total operating expense). This is consistent with its smaller-than-average service area population and possibly less-dense service area.
- **Effectiveness Measures** – ECAT consistently ranked below the peer mean for all of the effectiveness measures. Vehicle miles per capita for ECAT are approximately 34% below the peer group mean, indicating that the supply of service is less than typically experienced in other similar areas. Passenger trips per revenue mile and passenger trips per revenue hour are below the peer group mean, by 24% and 18%, respectively, indicating that there may be room for improvement for ridership levels. Revenue miles between failures has decreased by only 3%, indicating a consistent quality of service.
- **Efficiency Measures** – The cost efficiency measures provide varying indications of improvements and declines, depending on the measure. For example, ECAT's operating expense per service area

capita is 32% above the peer group mean, and its operating expense per passenger trip is 17% below the group mean. The operating expense per revenue mile only 2% below the peer group mean. ECAT's farebox recovery is approximately 20% below the peer group mean; the average fare charged is 50% above the peer group mean. Revenue miles per vehicle mile for ECAT is 5% above the peer group mean, which indicates an average utilization of fixed-route bus vehicles.

Table B-3: Summary of ECAT Trends

Indicators/Measures	% Change 2009–2014
General Indicators	
Service Area Population	11.2%
Service Area Size (square miles)	45.6%
Passenger Trips	34.0%
Passenger Miles	70.1%
Vehicle Miles	10.0%
Revenue Miles	9.6%
Vehicle Hours	-2.1%
Route Miles	1.3%
Total Operating Expense	32.0%
Vehicles Available for Maximum Service	20.5%
Total Gallons Consumed	4.7%
Effectiveness Measures	
Service Supply	
Vehicle Miles Per Capita	-1.1%
Service Consumption	
Passenger Trips Per Capita	20.5%
Passenger Trips Per Revenue Mile	22.3%
Passenger Trips Per Revenue Hour	38.1%
Quality of Service	
Number of Vehicle System Failures	4.9%
Revenue Miles Between Failures	4.5%
Efficiency Measures	
Cost Efficiency	
Operating Expense Per Capita	20.3%
Operating Expense Per Passenger Trip	-1.5%
Operating Expense Per Passenger Mile	-22.4%
Operating Expense Per Revenue Mile	20.4%
Operating Ratios	
Farebox Recovery (%)	25.0%
Vehicle Utilization	
Revenue Miles Per Total Vehicles	-9.0%
Energy Utilization	
Vehicle Miles Per Gallon	5.1%
Fare	
Average Fare	24.9%

Data source: National Transit Database

Paratransit Trend and Peer Systems Analysis

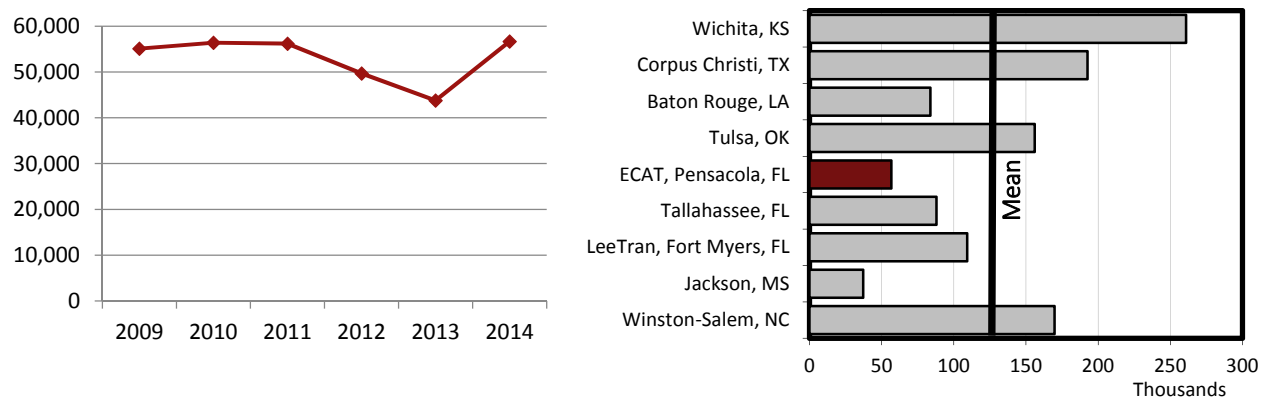
The following section is the trend and peer review analysis for ECAT's ADA paratransit service. The Greensboro (NC) peer system was removed from the peer analysis because no data were reported.

General Performance Measures

Passenger Trips

The total number of passenger trips for Escambia County's demand-response service fluctuated during the six-year period, but overall increased from approximately 55,000 to 57,000 passenger trips, a 29.5% increase, a rate that is markedly higher than the growth in service area population during the same time period. ECAT placed 55% below the peer mean of 128 passenger trips.

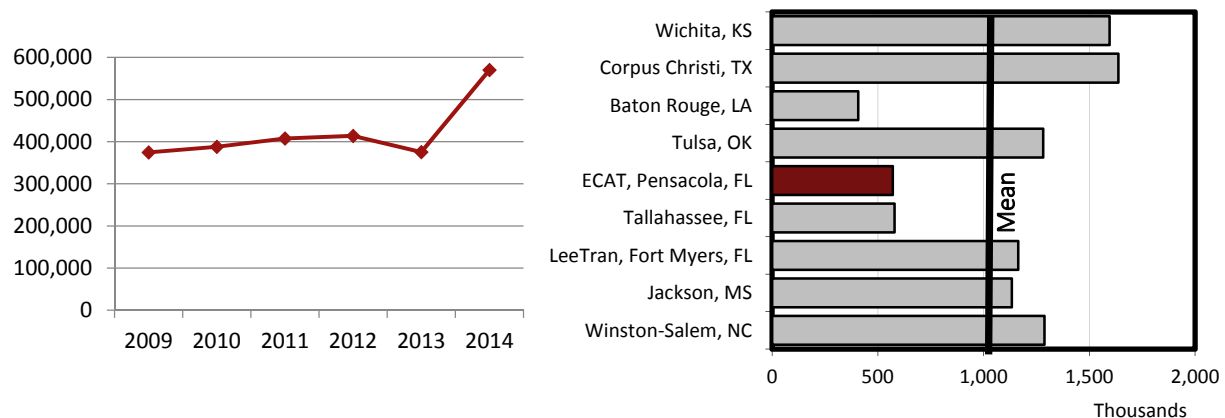
Figure B-25: ADA Paratransit Trend and Peer Comparison for Passenger Trips



Passenger Miles

The total number of passenger miles increased by 52.2% from 2009 to 2014, with most of the increase occurring after 2013. Despite these improvements, ECAT's paratransit service ranks the second lowest in this measure, at 47% below the peer mean.

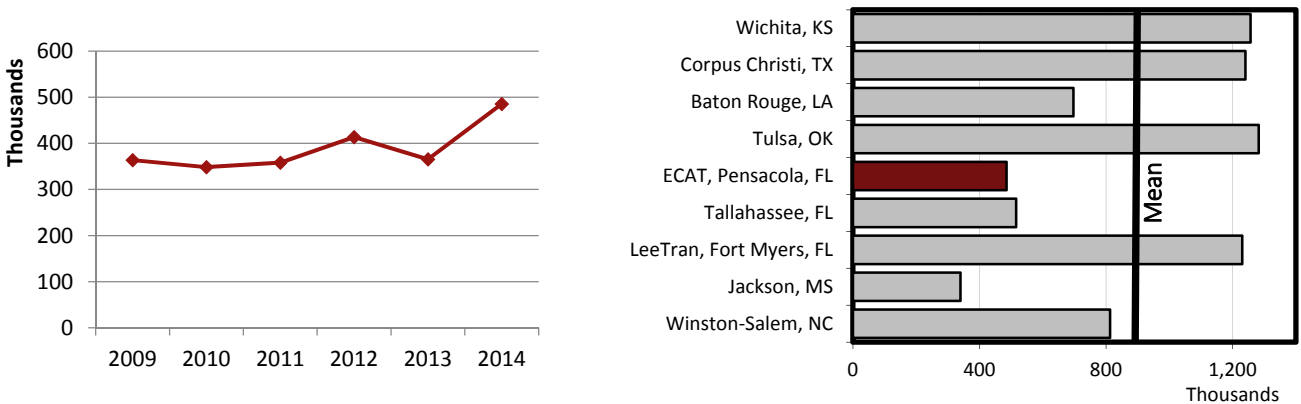
Figure B-26: ADA Paratransit Trend and Peer Comparison for Passenger Miles



Revenue Miles

Similar to passenger miles, ECAT's paratransit service experienced a 39% increase during the six-year period, most of which occurred after 2013. ECAT's paratransit service ranks the second lowest, at 44.4% below the peer mean.

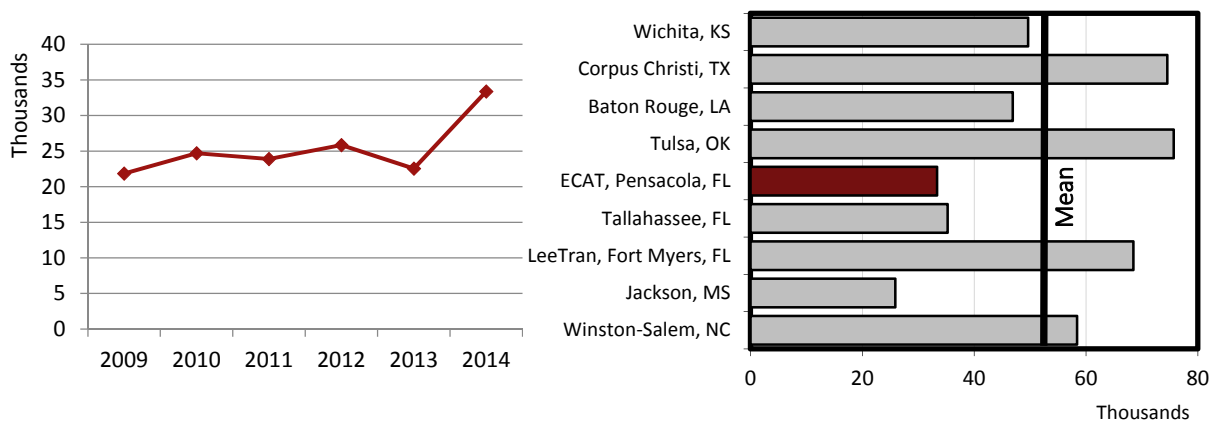
Figure B-27: ADA Paratransit Trend and Peer Comparison for Revenue Miles



Revenue Hours

Similar to the previously-mentioned general performance measures, ECAT's paratransit service increased 48%, with the greatest increase occurring after the year 2013. ECAT's paratransit service falls 35.8% below the peer mean.

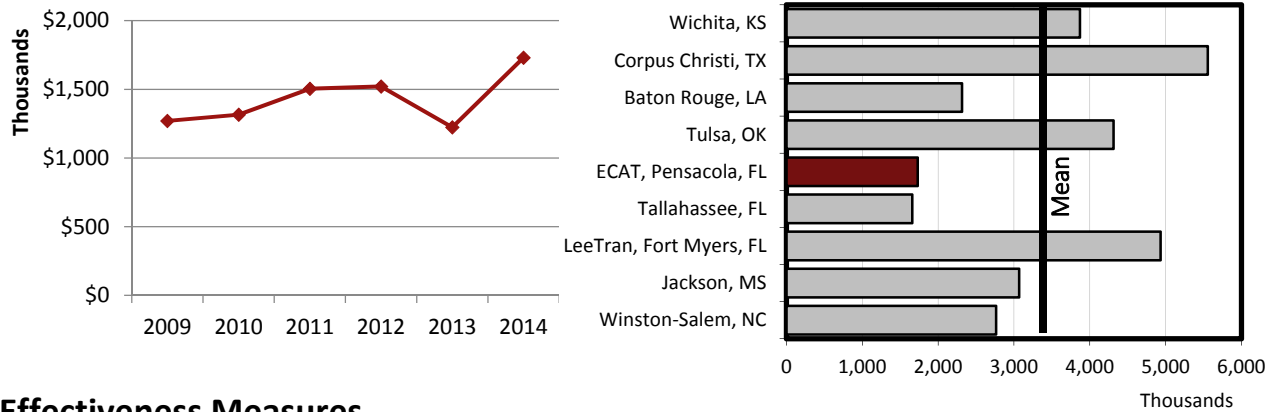
Figure B-28: ADA Paratransit Trend and Peer Comparison for Revenue Hours



Total Operating Expense

ECAT's ADA paratransit service experienced a 41.4% increase in total operating expense during the six-year period. The increase occurred concurrently with increases in service (i.e., increased passenger trips, revenue miles, etc.) ECAT's ADA paratransit service ranks second to lowest among its peer systems, at 49% below the peer mean.

Figure B-29: ADA Paratransit Trend and Peer Comparison for Total Operating Expense

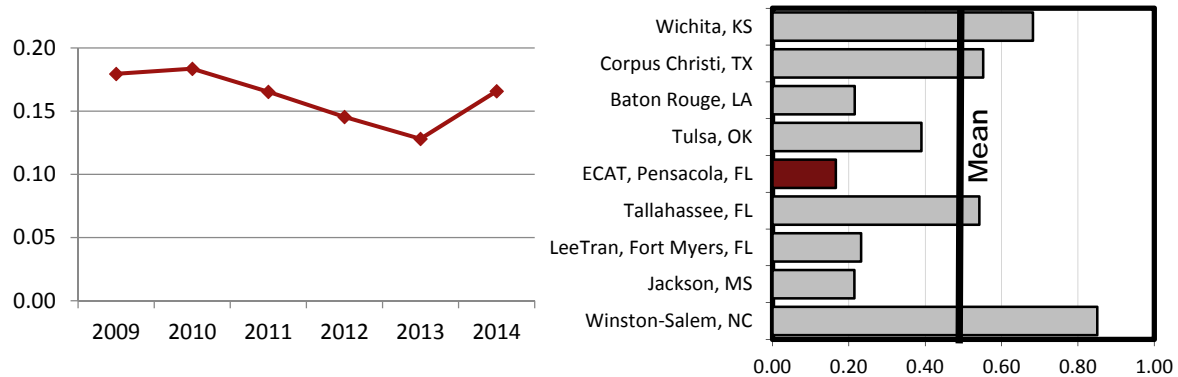


Effectiveness Measures

Passenger Trips per Capita

ECAT's ADA Paratransit service experienced a 7.6% decrease overall from 2009 to 2014. ECAT's ADA paratransit service is 62% below the peer mean and ranks at the bottom, suggesting a potential opportunity for improvement in this measure.

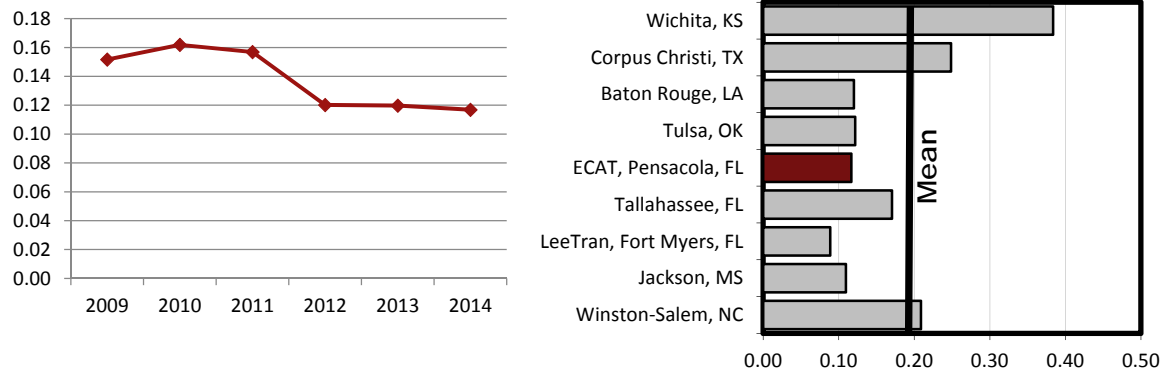
Figure B-30: ADA Paratransit Trend and Peer Comparison for Passenger Trips per Capita



Passenger Trips per Revenue Mile

ECAT's ADA paratransit service experienced a decline of 23.0% during the six-year period and ranks near the bottom of its peer systems, at 33% below the peer mean, suggesting potential opportunities for improvement in this measure.

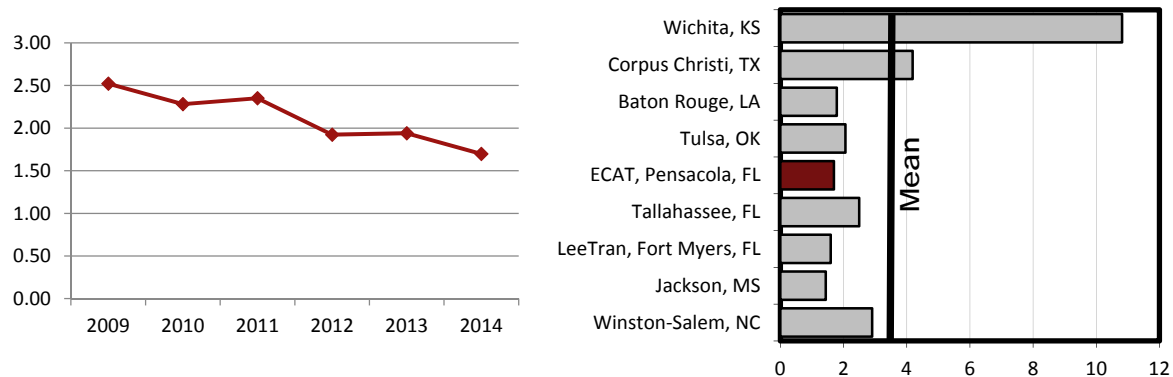
Figure B-31: ADA Paratransit Trend and Peer Comparison for Passenger Trips per Revenue Mile



Passenger Trips per Revenue Hour

Similar to the other effectiveness measures, ECAT's ADA paratransit service experienced a decline of 33.3% during the six-year period. ECAT is 47% below the peer mean, a value that is significantly raised due to the high passenger trips per revenue hour value reported by the Wichita, Kansas, paratransit system.

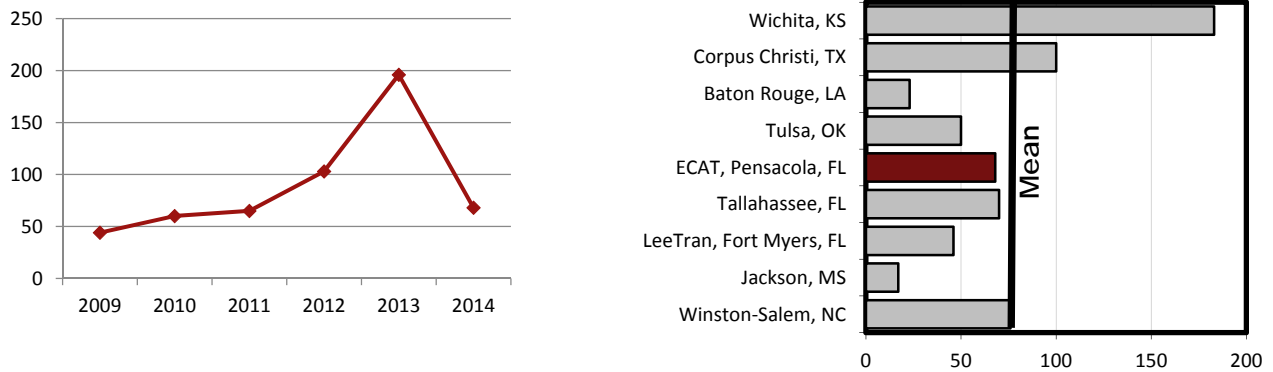
Figure B-32: ADA Paratransit Trend and Peer Comparison for Passenger Trips per Revenue Hour



Number of Vehicle System Failures

For ECAT's ADA paratransit service, the number of system failures peaked in 2013, with almost 200 vehicle failures. Overall, the number of vehicle system failures increased 54.6% in the six-year period. ECAT's ADA paratransit service is just below the peer mean of 70 vehicle system failures in 2014.

Figure B-33: ADA Paratransit Trend and Peer Comparison for Number of Vehicle System Failures

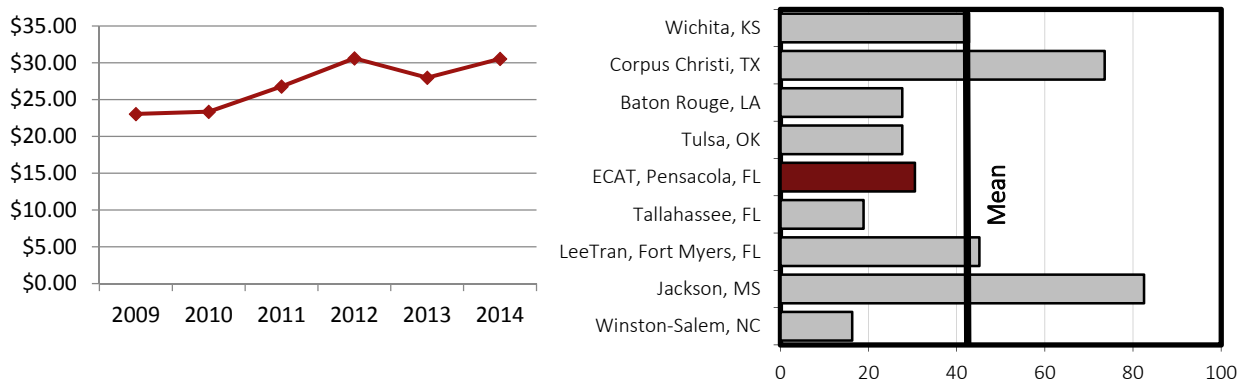


Efficiency Measures

Operating Expense per Passenger Trip

ECAT's ADA paratransit service has experienced a gradual increase of 32.5% in operating expense per passenger trip from 2009 to 2014. ECAT places 24.7% below the peer mean.

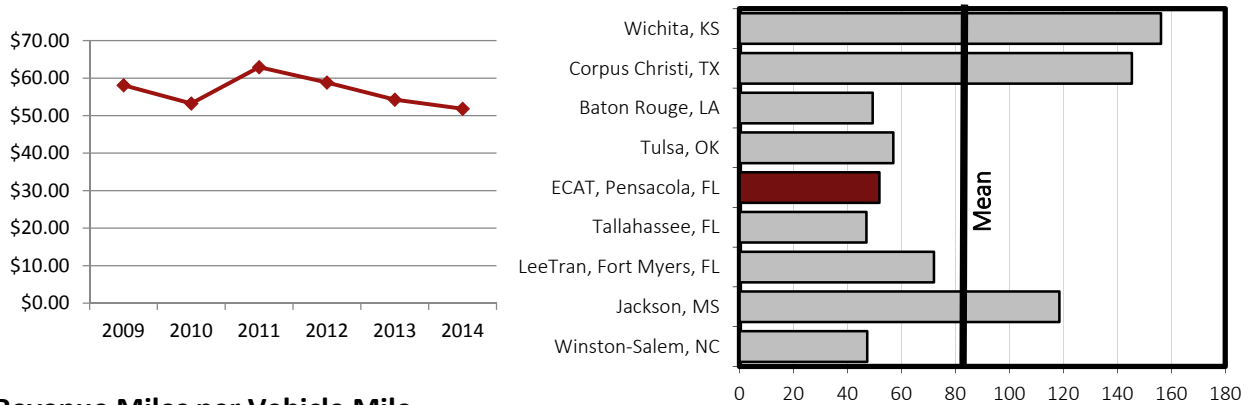
Figure B-34: ADA Paratransit Trend and Peer Comparison for Operating Expense per Passenger Trip



Operating Expense per Revenue Hour

In contrast to the operating expense per passenger trip, ECAT's ADA paratransit service experienced a gradual decline of 10.8% in operating expense per revenue hour in the six-year period. ECAT places 37.4% below the peer mean.

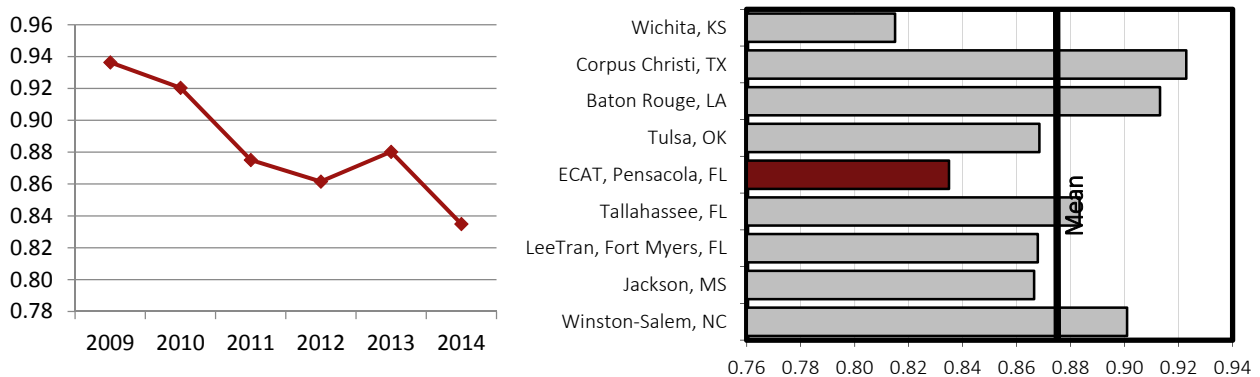
Figure B-35: ADA Paratransit Trend and Peer Comparison for Operating Expense per Revenue Hour



Revenue Miles per Vehicle Mile

Revenue miles per vehicle mile declined during the six-year period. The revenue miles per vehicle mile decreased from 0.94 in 2009 to 0.83 in 2014, an overall 10.8% decrease. ECAT places only 4.6 % below the peer mean of 0.875.

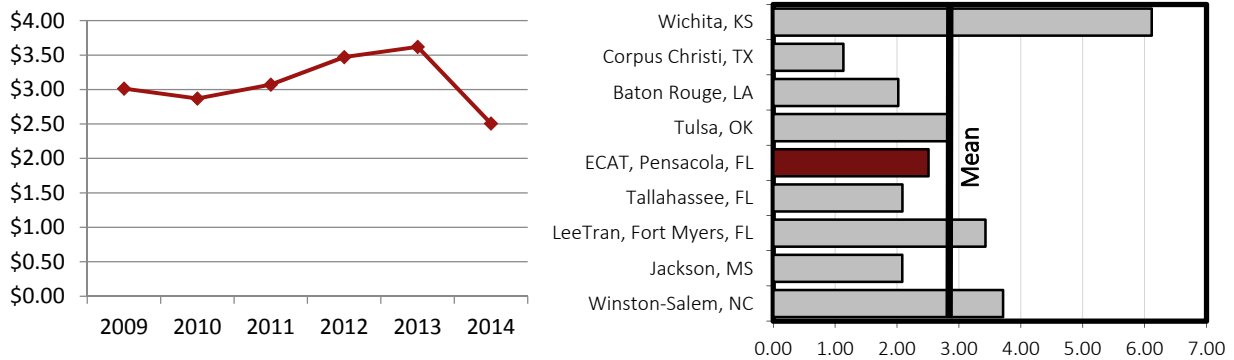
Figure B-36: ADA Paratransit Trend and Peer Comparison for Operating Expense per Revenue Hour



Average Fare

The average fare for ECAT's ADA paratransit service increased from \$3.01 in 2009 to a peak of \$3.62 in 2013 before declining overall to \$2.51 in 2014. ECAT places only 13.1% below the peer mean of \$2.90.

Figure B-37: ADA Paratransit Trend and Peer Comparison for Operating Expense per Revenue Hour



ADA Paratransit Trend and Peer System Summary

ECAT's passenger trips, passenger miles, revenue miles, revenue miles, and total operating expense increased overall during the six-year period, particularly after 2013, when Escambia County took over operations; prior to 2014, paratransit services were contracted to a private provider. ECAT experienced improvements in passenger trip per capita and operating expense per revenue hour but declined in performance for passenger trips per revenue mile, passenger trips per revenue hour, number of vehicle system failures, operating expense per passenger trip, and revenue miles per vehicle mile. ECAT consistently ranks between 35% and 60% below its peer systems for the most of the performance indicators, with the exception in number of vehicle system failures, where ECAT places close to the peer mean.

Appendix C:

Public Involvement Supporting Materials



Public Involvement Plan

Escambia County Area Transit Transit Development Plan Major Update

1. Introduction

PURPOSE OF PUBLIC INVOLVEMENT PLAN:

Under current legislation that became effective February 20, 2007, Escambia County must submit a Transit Development Plan (TDP) Major Update every five years. Escambia County, in collaboration with Escambia Area Transit (ECAT) is currently undertaking this process. The 10-year TDP is a strategic guide for public transportation in the community over the next 10 years and represents Escambia County's vision for public transportation during the 10-year time period. Current legislation requires that Escambia County document its Public Involvement Plan (PIP) to be used in the transit development planning process.



Public involvement for the development of a TDP Major Update includes communicating with and receiving information from all interested persons, groups, agencies, and government organizations. This PIP documents the public involvement activities that will be used ECAT's 2017-2026 TDP Major Update.

Successful public involvement is based on building trust, understanding, and loyalty and is necessary to reach a consensus on public transit investments, which requires a process characterized by technical competence, honesty, integrity, and good listening. These principles will create the framework for the public involvement that will occur during the ECAT TDP Major Update. The awareness and involvement of interested persons are integral to successful transit planning. This PIP sets forth specific measures to heighten public awareness and responsiveness. Optimum public participation begins early in the planning process and continues throughout each of the planning phases. It is essential that transit agencies understand a community's values, but it is equally important for the community to understand the tradeoffs and financial constraints associated with



Transit Development Plan Major Update

Revised February 2016

transportation planning. This mutual understanding can only be achieved through early, frequent and continued communication with the public. When the public is actively engaged in transit planning their insight helps ensure the transit system meets the community needs now and in the future.

The purpose of this PIP is to provide a blueprint for public involvement for the ECAT TDP Major Update. This blueprint will guide the process, but will remain flexible enough to allow deviations from the plan as directed by the management of ECAT and Escambia County.

Activities implemented as part of the PIP will allow people who live, work, visit, attend school, and govern within the ECAT service area to contribute to the decision-making process and to influence the decisions that are made regarding proposed transit investments. The goal of the PIP is to generate interest in the TDP process and to schedule and outline the public input process. This will ensure that the public, local agencies, local officials and other interested parties understand the TDP process. This will be achieved by providing an open, two-way line of communication, present TDP information in an easy-to-understand format, and make all information easily accessible.

Gaining consensus among the various stakeholders in the TDP is essential to achieving a successful study outcome. Therefore, the purpose of outreach activities outlined in this PIP is:

- To provide the public with complete, timely and frequent access to information
- To create opportunities for the public to be informed about the plan, particularly those who will be directly affected by the outcomes of the plan
- To ensure that public input is an integral part of the decision-making process
- To maintain regular communication with stakeholders to achieve community consensus to determine future needs

Public involvement efforts will seek to truly involve key stakeholders, listen to their ideas and concerns, and document and incorporate input received during the TDP process. However, effective transportation decision-making depends not only depend on the raw number of persons involved in the planning process, but also upon understanding and properly addressing the unique needs of different socioeconomic groups within the study area

This concept is referred to as Environmental Justice (EJ), upon which there are three fundamental principles:



Transit Development Plan Major Update

Revised February 2016

- To avoid, minimize, or mitigate disproportionately high and adverse human health and environmental effects, including social and economic effects, on minority populations and low-income populations.
- To ensure the full and fair participation by all potentially affected communities in the transportation decision-making process.
- To prevent the denial of, reduction in, or significant delay in the receipt of benefits by minority and low-income populations.

As a recipient of federal funds, ECAT must also comply with the Title VI of the Civil Rights Act of 1964 which prohibits discrimination on the basis of race, color, and national origin in programs and activities receiving federal financial assistance. Therefore, a special effort will be made to seek out and include minorities, low income, elderly and disabled populations. All published information will be translated into other languages, as appropriate. All public meetings, workshops and hearings will be held at convenient times and locations and will be held in handicapped-accessible venues.

The fundamental objectives of the PIP are to ensure that the concerns and issues of those with a stake in the ECAT TDP are identified, given opportunities to provide input into the process and that all concerns and suggestions are reviewed and addressed. The PIP provides an outline for:

- Early and continuous involvement by the public
- Reasonable availability of all TDP information
- Open access to the decision-making process

Information gathered through the public outreach process will be incorporated into the TDP development process to identify and evaluate potential alternatives to consider as part of the 10-year strategic transit plan for Escambia County.



Transit Development Plan Major Update

Revised February 2016

OVERVIEW OF ECAT TDP: In 1971, the ECAT assumed operations of the greater Pensacola area public transportation system from the City of Pensacola. Escambia County government undertook responsibility of maintaining a historical system with a nearly 100-year-old legacy of transit. The system currently consists of more than 20 routes operated on a daily basis. They also operate a beach trolley service and a University of West Florida trolley. The system is currently managed and operated by First Transit.



The 10-year TDP is a strategic guide for ECAT's services over the next 10 years and represents Escambia County's vision for public transportation during that time period. The multi-year plan is required by the Florida Department of Transportation (FDOT) and calls for a description of the transit agency's vision for public transportation, along with an assessment of transit needs in the study area. FDOT requires a TDP in order to maintain eligibility for State Block Grant funding. The TDP is also a policy document that merges transit goals and objectives with other community adopted plans. FDOT places a special emphasis on public participation in the preparation of a TDP.

PIP APPROACH: Ensuring appropriate planning and implementation of the PIP elements is an important key to successful results and a three-prong approach has been undertaken to layout the PIP and oversee its implementation. Included is a specific staff level team to lead the decision-making process on the strategies, announcements, and performance of the various PIP elements; a team of stakeholders who will review and provide community insight and guidance to the planning and decision-making process; and, a strategic plan of action to effectively engage stakeholders, citizens, and others in the TDP development process.

TDP PROJECT MANAGEMENT TEAM: The Project Management Team (PMT) will be established to coordinate this efforts. The PMT will consist of staff from ECAT, Escambia County, West Florida Regional Planning Council / Florida Alabama TPO and the Consultant Team, led by Tindale Oliver. The individuals on this team have the technical expertise and an understanding of local issues, wants and needs. The PMT will be made up of the ECAT General Manager, the ECAT Marketing Director, planners from the West Florida Regional Planning Council, Escambia County's Project Manager and staff from



Transit Development Plan Major Update

Revised February 2016

Tindale Oliver and Quest Corporation. It will oversee the direction of the TDP to ensure that it is complete and remains on schedule. The PMT will meet a minimum of four times.

TECHNICAL REVIEW TEAM: A Technical Review Team (TRT) will provide input and guidance into the development of this TDP. The TRT will review and comment on the TDP during the development of the mission, goals, objectives, alternatives and implementation program. The TRT will have eight members and will be composed of members from ECAT, Escambia County, Santa Rosa County, Baldwin County, Florida-Alabama Transportation Planning Organization (TPO), University of West Florida (UWF), Workforce EscaRosa, and FDOT District 3.

IDENTIFICATION OF AGENCIES AND AFFECTED PUBLIC: The PIP will be crucial for developing support for recommendations. The PMT understands the importance of a thorough, comprehensive engagement plan that penetrates throughout the ECAT study area. The team is familiar with the various communities and groups in the study area and is proposing an inclusive strategy that engages, informs, educates, involves and reaches out to those who will be impacted by the TDP.



2. Public Involvement Process

TDP PUBLIC INVOLVEMENT ACTIVITIES: Numerous public involvement techniques were selected for inclusion in the PIP to ensure the active participation of citizens in the community. Table 2-1 presents the type of public involvement activities that will be completed for the TDP and the techniques associated with each type of activity.

Table 2-1
ECAT TDP Public involvement Activities

Public Participation Activity		TDP PIP
Technical Review Team Meetings		<input checked="" type="checkbox"/>
Engaging the Community	Bus Rider Surveys	<input checked="" type="checkbox"/>
	Non-Rider Surveys	<input checked="" type="checkbox"/>
	Public Workshops	<input checked="" type="checkbox"/>
	Discussion Group Workshops	<input checked="" type="checkbox"/>
	Stakeholder Interviews	<input checked="" type="checkbox"/>
	Grassroots Outreach	<input checked="" type="checkbox"/>
Agency Coordination	Regional Coordination	<input checked="" type="checkbox"/>
	State & Local Officials	<input checked="" type="checkbox"/>
Bus Operator Survey		<input checked="" type="checkbox"/>
Website		<input checked="" type="checkbox"/>
Email Blasts		<input checked="" type="checkbox"/>
Social Media Networking (Facebook)		<input checked="" type="checkbox"/>
Media Relations		<input checked="" type="checkbox"/>
BOCC Meetings/Presentations		<input checked="" type="checkbox"/>

The public involvement techniques to be used for the ECAT TDP update have been placed into two categories: direct involvement techniques and information distribution techniques. Direct techniques refer to activities that engage the public in “hands-on” workshops and / or discussion about the project. Information distribution techniques refer to public information materials that are used to inform the general public of issues regarding the project.



DIRECT INVOLVEMENT TECHNIQUES: Direct involvement techniques for the ECAT TDP are described below.

- **Project Kickoff Meeting** - A project kickoff meeting will be held with the PMT to discuss the objectives, scope and milestones of the project.
- **Technical Review Team Meetings** - The TRT will be established at the outset of the project to monitor and provide input throughout the study and to evaluate the deliverables. Key project deliverables will be distributed to the TRT for review and comment. Most of the communication with the TRT will be via e-mail and telephone; however, three meetings with the TRT will be scheduled and conducted during the course of the update effort.
- **Rider Survey** - A bus on-board survey of fixed-route bus patrons will be conducted to capture demographic, travel behavior, and rider satisfaction data from ECAT fixed-route bus riders. To allow for sufficient valid survey responses that will support statistical rigor of the results, the survey effort will cover at least 40 percent of ECAT's scheduled fixed-route bus trips on weekdays and weekends. This information will enable ECAT to focus on relevant transit needs and issues such as modifying bus schedules, locating bus stops, modifying the fare structure, planning for future service, focusing on marketing campaigns, and identifying historical trends in rider satisfaction. The survey will be available in both English and Spanish.
- **Non-Rider Survey** - A survey of the general public will be developed and distributed to the residents and visitors in Escambia County. In addition, a web survey will also be developed and made available to residents and visitors with Internet access to provide their input on transit needs. Surveys will also be available at workshops, events, and through other means as appropriate.
- **Public Workshops** - Public workshops have proven to be an effective technique for obtaining substantive public participation in the planning process. A total of four public workshops will be conducted to obtain input from the general public about the TDP update process; one will be held early in the process to collect input on needs, and the other held later in the project to collect input on potential alternative improvements. To maximize opportunities for citizen participation, locations will be selected to ensure geographic coverage and, to the extent possible, piggyback on other



Transit Development Plan Major Update

Revised February 2016

community events. All meetings will be held in accordance with Title VI requirements, and notices will include instructions for special accommodations and language assistance. The project team will prepare appropriate notices and flyers for advertisement of public meetings and workshops, and ECAT staff will post the actual notice in a newspaper of general circulation, online, and on-board buses, as required.

- **Stakeholder Interviews** - Since the understanding of local conditions should include knowledge of the perceptions and attitudes of community decision-makers and leaders towards transit and its role in the community, up to 15 stakeholder interviews will be conducted as part of the public involvement process. The project team will work with Escambia County and ECAT staff to identify and recruit appropriate individuals to interview. The project team will then schedule and conduct the interviews using an interview script that will be developed and submitted to staff for review prior to the first interview. Interviews will be conducted in person unless an interviewee requests the option of participating via a telephone interview because it fits better in terms of schedule.
- **Discussion Group Workshops** - Four discussion group workshops will be held to identify and assess perceptions of transit to help identify issues and opportunities for the transit agency. Although there are several methodologies for collecting such information, one of the more cost-effective methods of obtaining public input on transit is through the use of discussion group workshops. Although not intended to provide a statistically-valid sample, a discussion group is an excellent tool for revealing the attitudes of a particular group because of the open-ended nature of group discussions. *The four discussion group workshops will be held around the County to ensure geographic distribution of the participants. At least one of the workshops will be conducted using current transit riders to help represent the "user" perspective. In addition, at least one of the workshops will consist of members from the business, health, social service, and education communities, as well as local chambers of commerce, to help represent the views of informed "non-users."* The project team will work with the PMT to identify preferred venues for the workshops



Transit Development Plan Major Update

Revised February 2016

- **Bus Operator Interviews and Survey** - As ambassadors of the transit agency, bus operators have the most opportunity for and the greatest depth of contact with ECAT's public transportation existing patrons on a day-to-day basis. This fact makes them a valuable asset both for vetting rider input and for providing important insights into route-level and system network issues related to operations, safety, scheduling, etc. The project team will make use of this asset by spending time in the bus operator break room and informally interviewing fixed-route and paratransit operators about existing services, potential enhancements, and often-heard rider needs and complaints. TDP development will be taking place during winter and spring months, a busy timeframe for travelers to the area, so these operator interviews can also provide insights from visiting tourists and "snow-bird" residents. In addition, an operator survey also will be developed and distributed to bus operators to collect static responses and ensure all operators have an opportunity to participate.
- **Grassroots Outreach Events** - In addition to the public workshops, ECAT staff may attend various grassroots outreach events, including the following.
 - Pensacola State College Resource Fair
 - UWF Spring Career Showcase
 - Escambia Cares Expo Community Event
 - Earth Day 2016
 - Celebrating Brownsville Festival
 - Juneteenth Celebration Expo
 - National Dump the Pump Event - June 16th
 - Reimagine Wedgewood Annual Event
 - Safe Mobility for Life Coalition Symposium
 - Escambia County Community Parent Teacher Association (ECCPTA) Vendor/Health Fair

The events were selected for potential participation based on past event attendee totals, type of event, opportunity for meaningful interaction among staff and attendees, and staff scheduling integration. It should be noted that in addition to these events, ECAT staff may also attend other grassroots outreach events during the TDP planning period.



Transit Development Plan Major Update

Revised February 2016

INFORMATION DISTRIBUTION TECHNIQUES: The information distribution techniques used for the TDP Major Update are described below:

- **TDP Branding** - The project team will develop a TDP branding scheme to make the TDP planning and public participation process more engaging and user-friendly for citizens. It is envisioned that the resulting brand of this effort would become the principal means of individuals to easily identify the TDP and distinguish it from other transit-related studies and documents.
- **Project Website** - Project website will be developed to inform transit users and the general public about the 10-year transit plan and information on the upcoming public workshops. The website will also be used to host online surveys.
- **Email Blasts** - Email blasts will be sent by the PMT to transit stakeholders and their constituents to solicit opinions, ideas and Plan information. These email blasts will include workshop and other public participation event information as well as opportunities and reminders to complete surveys and questionnaires integral to the Plan. Up to six email blasts will be sent out to lists provided by PMT members.
- **Notification of General Public** - The general public will be notified about public meetings through legal advertisements, project and ECAT websites, flyers and social media.
- **Notification of State and Local Agencies** - The Regional Workforce Development Board, the TPO and FDOT will be advised of all public meetings via email. In addition, applicable project deliverables will be submitted to them to solicit feedback and comments.
- **Social Media Outreach** - Social networking opportunities for the project will be provided using ECAT's existing Facebook account. Links to existing social media accounts will be integrated into the TPO and ECAT websites.
- **Project Business Cards** - Business cards with the brand and TDP information will be printed and distributed through bus operators, pass outlets, agency partners, and other locations as identified and made available. This effort will assist citizens interested in completing surveys, attending public participation events, and visiting ECAT and project websites to keep abreast of Plan progress and provide input as desired.



3. Public Involvement Schedule

A tentative project schedule has been developed for the public participation portions of the ECAT TDP Major Update, as shown in Figure 3-1. Please note that dates for specific meetings and public involvement activities are approximate and subject to change pending guidance from the PMT/TRT and Escambia County.

Figure 3-1
Public Involvement Activities & Tentative Schedule – 2016

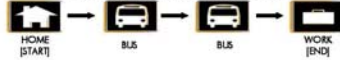
Public Participation Activity	Time Frame
Technical Review Team Meetings	March - July
Rider Survey	January
Non-Rider Survey	February - May
Bus Operator Survey	February
Public Workshops – Round 1	February - March
Public Workshops – Round 2	April - May
Stakeholder Interviews	February - March
Discussion Group Workshops	March - April
BOCC Meetings/Presentations	July - August
Project Website	January - September
Email Blasts	February - July
Social Media Networking (Facebook)	January - September
Media Relations	January - September
Grassroots Outreach Events	February - June

Escambia County Area Transit (ECAT) On-Board Survey

ECAT is planning for the future and needs your feedback to help improve transit services. Your participation in this survey is anonymous and voluntary. If you do not wish to participate, please return the blank form to the surveyor. If you choose to fill out a survey, please check (✓) the correct item, write out, or circle your answers. THANK YOU FOR YOUR COOPERATION.

This survey is about the ONE-WAY transit trip you are making now!

Example of ONE-WAY Bus Trip



1. Where are you COMING FROM NOW? (Please ✓ the starting place of this one-way trip) (Mark one only)

1. ☐ Work 4. ☐ School (K-12) 7. ☐ Shopping/Errands
2. ☐ Medical 5. ☐ College/Tech 8. ☐ Home
3. ☐ Social/Personal 6. ☐ Recreation 9. ☐ Other (specify) _____

2. What is the ADDRESS OR NAME of the PLACE, BUSINESS, OR BUILDING you are COMING FROM now?

Address or Intersection (e.g., University @ 34th Street) _____

Place, Business, or Building Name (e.g., Shands Medical Center) _____

City _____

3a. How did you get to the bus stop for this ONE-WAY trip? (Please ✓ only ONE)

1. ☐ Walked 4. ☐ Was dropped off 7. ☐ Other (specify) _____
2. ☐ Bicycled 5. ☐ Rode w/ someone who parked 8. ☐ Transferred from another route (Go to Question 3b)
3. ☐ Drove & parked

3b. If you transferred to this bus from another route during this ONE-WAY trip, what route(s) did you transfer FROM? (Please list in order)

Please list all bus routes: _____

4. Where are you GOING TO NOW on this ONE-WAY trip? (Please ✓ the ending place of this one-way trip) (Mark one only)

1. ☐ Work 4. ☐ School (K-12) 7. ☐ Shopping/Errands
2. ☐ Medical 5. ☐ College/Tech 8. ☐ Home
3. ☐ Social/Personal 6. ☐ Recreation 9. ☐ Other (specify) _____

5. What is the NAME OR ADDRESS of the PLACE, BUSINESS, OR BUILDING you are GOING TO now?

Address or Intersection (e.g., University @ 34th Street) _____

Place, Business, or Building Name (e.g., Shands Medical Center) _____

City _____

6a. After you get off this bus, how will you get to your FINAL DESTINATION for this ONE-WAY trip? (Please ✓ only ONE)

1. ☐ Walk 4. ☐ Will be picked up 7. ☐ Other (specify) _____
2. ☐ Bicycle 5. ☐ Ride w/ someone who parked
3. ☐ Drive 6. ☐ Transfer to another route (Go to Question 6b)

6b. If you are transferring from this bus to another bus route to complete this ONE-WAY trip, what bus route(s) will you transfer TO? (Please list in order)

Please list all bus routes: _____

7. How many days a week do you ride the bus? (Please ✓ only ONE)

1. ☐ 1-2 days 2. ☐ 3-4 days 3. ☐ 5 days 4. ☐ 6-7 days 5. ☐ Once every _____ weeks

8. How would you make this ONE-WAY TRIP if not by bus? (Please ✓ only ONE)

1. ☐ Drive 3. ☐ Wouldn't make trip 5. ☐ Walk 7. ☐ Other (specify) _____
2. ☐ Ride with someone 4. ☐ Bicycle 6. ☐ Moped/Scooter

PLEASE CONTINUE ON BACK OF SURVEY →

9. What type of fare did you pay when you boarded this bus? (Please ✓ only ONE)

1. ☐ Base Fare (\$1.75) 5. ☐ 30-Day Pass (\$47.00) 9. ☐ 1-Day Pass (\$5.25)
2. ☐ Half Fare (\$0.85) 6. ☐ Senior/Disabled 30-Day Pass (\$35.00) 10. ☐ 7-Day Pass (\$14.50)
3. ☐ Student Fare (\$1.25) 7. ☐ Senior/Disabled 10-Ride Ticket (\$7.00) 11. ☐ Other _____
4. ☐ 20-Ride Ticket (\$20.00) 8. ☐ Student 10-Ride Ticket (\$12.00) 12. ☐ Commuter Fares (On Routes 56A, 59 Express, 60, 61, 64), Specify Fares: _____

10. Compared to other transportation alternatives available to you, what is the MOST IMPORTANT reason you ride the bus? (Please ✓ only ONE)

1. ☐ I prefer ECAT to other alternatives 2. ☐ ECAT is more convenient 3. ☐ I do not drive
4. ☐ Car is not available all the time 5. ☐ Parking is too expensive/difficult 6. ☐ I do not have a car
7. ☐ ECAT fits my budget better 8. ☐ Do not have valid driver's license 9. ☐ Other _____
10. ☐ Traffic congestion 11. ☐ Bus is more environmentally friendly

11. Which of the following improvement(s) do you think are most important? (Check top THREE)

1. ☐ More frequent service, specify route # _____ 5. ☐ More Saturday service
2. ☐ Bus service to new areas, where _____ 6. ☐ More benches and shelters at bus stops
3. ☐ Express (limited stop) service 7. ☐ Better sidewalk connections to bus stops
4. ☐ Earlier/Later service on existing routes 8. ☐ Other (specify) _____

12. How do you prefer to receive information about ECAT service, schedules, and changes?

1. ☐ ECAT website 4. ☐ Library 7. ☐ In bus
2. ☐ Newspaper 5. ☐ Paper bus schedules 8. ☐ ECAT Email
3. ☐ At bus stop 6. ☐ Phone

13. Your age is....

1. ☐ 17 or under 4. ☐ 25 to 34 7. ☐ 45 to 54 10. ☐ 65 to 74
2. ☐ 18 to 24 5. ☐ 35 to 44 8. ☐ 55 to 64 11. ☐ Over 74

14. What is your gender? 1. ☐ Male 2. ☐ Female

15. What is your primary language? 1. ☐ English 2. ☐ Spanish 3. ☐ Other _____

16. Are you Hispanic, Latino, or Spanish Origin? 1. ☐ Yes 2. ☐ No

17. What is your race or ethnic heritage? (Please ✓ only ONE)

1. ☐ White 2. ☐ Black/African American 3. ☐ American Indian or Alaska Native 4. ☐ Asian
5. ☐ Other _____

18. What was the range of your TOTAL household income for 2015?

1. ☐ Under \$10,000 4. ☐ \$30,000 to \$39,999 7. ☐ Do not Work
2. ☐ \$10,000 to \$19,999 5. ☐ \$40,000 to \$49,999
3. ☐ \$20,000 to \$29,999 6. ☐ \$50,000 or more

19. How many working cars, vans, and/or light trucks are available in your household?

1. ☐ Zero vehicles 2. ☐ One vehicle 3. ☐ Two or more vehicles

20. How many licensed drivers are in your household, including yourself?

1. ☐ One 2. ☐ Two 3. ☐ Three or more

21. What is your home zip code? _____

22. Please tell us about today's bus ride. Circle a score to reflect your opinion about each characteristic.

	Very Poor	Poor	Fair	Good	Very Good
How often the buses run on this route?	1	2	3	4	5
How courteous was the Bus Operator during your trip?	1	2	3	4	5
How directly does this route go to your destination?	1	2	3	4	5
How is the length of time your trip takes?	1	2	3	4	5
How on-time is this bus running today?	1	2	3	4	5
How safe did you feel today while waiting for the bus?	1	2	3	4	5
How was the shade or shelter where you waited?	1	2	3	4	5
How user-friendly is the ECAT website, www.goecat.com?	1	2	3	4	5
Your overall satisfaction with ECAT	1	2	3	4	5

THANK YOU FOR COMPLETING THE SURVEY!



Bus Operator Survey

Please take a few moments to answer the following questions. This survey is part of an effort to improve ECAT services. Please do NOT put your name or other identifying mark on the survey.

1. The following is a list of possible complaints riders may voice to bus operators. Please read the list of common complaints below carefully and mark the 3 complaints that you hear most frequently from riders.

- | | |
|--|---|
| <input type="checkbox"/> need more frequent service | <input type="checkbox"/> need more later service. Until what time? ____ |
| <input type="checkbox"/> bus doesn't go where I want | <input type="checkbox"/> need better sidewalk connections to bus stops |
| <input type="checkbox"/> bus is late | <input type="checkbox"/> need express service. Where? ____ |
| <input type="checkbox"/> bus leaves stop too early | <input type="checkbox"/> need better connections to other counties. Where? ____ |
| <input type="checkbox"/> bus is not clean | <input type="checkbox"/> need more bus shelters/benches |
| <input type="checkbox"/> bus is not comfortable | <input type="checkbox"/> bus schedule too hard to understand |
| <input type="checkbox"/> safety/security at bus stop | <input type="checkbox"/> fare is too high |
| <input type="checkbox"/> safety/security onboard bus | <input type="checkbox"/> other (please specify) _____ |

2. Do you think these complaints are valid? Please explain.

3. What do riders like about ECAT? Please list the 3 compliments that you hear most frequently from riders.

4. Do you know of any safety or operating problems on any routes? Please explain.

5. Provide any specific service improvements to ECAT bus routes. Include information for routes that you drive and that you don't drive. Examples of service improvements include improving bus running times, adding new destinations, improving service frequency, combining services with other ECAT routes, etc.

Route	Service Improvement/Comment

6. What do you like best about being an ECAT operator?

7. Use the space below to provide any other comments that could help improve ECAT service.

THANKS FOR YOUR HELP!

Re: Public Transit Plan Underway – Community Input Sought

Pensacola - Escambia County, in coordination with the Escambia County Area Transit (ECAT), has launched a major update to the County's 10-year Transit Development Plan (TDP). Dubbed Connections 2026: Moving Escambia Forward, the update will serve as a guide for the future of public transportation in Escambia County from 2017–2026. It represents the transit agency's vision to promote transit growth and improvement in Escambia County and the region over the next decade.

Public feedback is an important part of the process, and numerous activities have been completed and/or planned to support Connections 2026, including rider and non-rider surveys, stakeholder interviews, focus group discussions, grassroots outreach events, and public workshops.

A project website has been established to provide project updates and information on any upcoming outreach events. Members of the public are encouraged to visit <http://www.connections2026.com> and participate in an online public input survey to help Escambia County and ECAT improve public transportation locally and in the region.

Media Contact:

Tonya Ellis
Director of Marketing & Community Relations
Escambia County Area Transit
850-595-3228, ext. 1229
850-595-3229 Direct
tellis@co.escambia.fl.us



Escambia County Area Transit (ECAT) Public Transit Survey

Please take a minute to help us plan for transit needs in Escambia County!

- (1) How much awareness is there in the community about transit/public transportation?**

☐ High
☐ Moderate
 ☐ None at all
☐ Do not know

- (2) What do you think of ECAT transit service?**

<input type="checkbox"/>	It must be provided
<input type="checkbox"/>	It might be useful
<input type="checkbox"/>	It does not matter to me
<input type="checkbox"/>	Not sure it is useful
<input type="checkbox"/>	We do not need it
<input type="checkbox"/>	I am not familiar with it at all

- (3) Is traffic congestion a problem in Escambia County?**

	No
	Yes

If yes, please indicate any specific locations below:

- (4) If you answered yes to Question 3, what role do you see transit playing in alleviating the situation?**

- ☐ It will relieve congestion
- ☐ It may provide some help
- ☐ It will have no effect
- ☐ It may create some additional traffic issues
- ☐ It will make congestion worse

- (5) Have you used ECAT transit service?**

	Yes
	No

- (6) What is the zip code of your residence?

- (7) What is the zip code of your work (if applicable)?

- (8) Do you think there is a need for additional transit service in Escambia County?**

	Yes
	No

- (9) If you answered yes to Question 8, what benefits of transit do you believe could occur as a result of additional service?

<input type="checkbox"/>	Provide a more dependable source of transportation for me
<input type="checkbox"/>	Allow better commuting options/access to job opportunities
<input type="checkbox"/>	Be better for the environment
<input type="checkbox"/>	Enhance tourism and other industries
<input type="checkbox"/>	Enhance connectivity to military establishments

- (10) If you answered yes to Question 8, select the type of service you would most like to see?

☐ More Frequent Bus Service

☐ Express Service, where? _____

☐ Later Service

☐ Increased Coverage Area
where? _____

☐ Carpools/Vanpools

☐ Other, specify _____

- (11) What do you think is a reasonable one-way fare to pay for transit service?**

<input type="checkbox"/>	\$0.00 to \$0.50	<input type="checkbox"/>	\$1.51 to \$2.00
<input type="checkbox"/>	\$0.51 to \$1.00	<input type="checkbox"/>	More than \$2.00
<input type="checkbox"/>	\$1.01 to \$1.50		

- (12) Do you believe there is a willingness in the community to consider additional local funding for transit?**

<input type="checkbox"/>	Definitely	<input type="checkbox"/>	Not at all
<input type="checkbox"/>	Somewhat	<input type="checkbox"/>	Do not know

- (13) Are you willing to pay additional local taxes for an expanded transit system?

<input type="checkbox"/>	Definitely	<input type="checkbox"/>	Not at all
<input type="checkbox"/>	Somewhat	<input type="checkbox"/>	Do not know

- (14) Your age is...

☐ Under 18 ☐ 45 to 64 years
☐ 18 to 24 years ☐ Over 65 years
☐ 25 to 44 years

- (15) What is the range of your total household income for 2015?

<input type="checkbox"/>	Less than \$10,000	<input type="checkbox"/>	\$40,000 - \$49,999
<input type="checkbox"/>	\$10,000 - \$19,999	<input type="checkbox"/>	\$50,000 - \$74,999
<input type="checkbox"/>	\$20,000 - \$29,999	<input type="checkbox"/>	\$75,000 or greater
<input type="checkbox"/>	\$30,000 - \$39,999		

Please continue survey on the other side of this page.



Escambia County Area Transit (ECAT) Public Transit Survey

Please take a minute to help us plan for transit needs in Santa Rosa County!

(1) How much awareness is there in the community about transit/public transportation?

- | | |
|-----------------------------------|--------------------------------------|
| <input type="checkbox"/> High | <input type="checkbox"/> None at all |
| <input type="checkbox"/> Moderate | <input type="checkbox"/> Do not know |

(2) What do you think of public transit service?

- ☐ It must be provided
- ☐ It might be useful
- ☐ It does not matter to me
- ☐ Not sure it is useful
- ☐ We do not need it
- ☐ I am not familiar with it at all

(3) Is traffic congestion a problem in your community?

- ☐ No
☐ Yes

If yes, please indicate any specific locations below:

(4) If you answered yes to Question 3, what role do you see transit playing in alleviating the situation?

- ☐ It will relieve congestion
- ☐ It may provide some help
- ☐ It will have no effect
- ☐ It may create some additional traffic issues
- ☐ It will make congestion worse

(5) Have you used ECAT transit service?

- ☐ Yes
☐ No

(6) What is the zip code of your residence?

(7) What is the zip code of your work (if applicable)?

(8) Do you think there is a need for additional transit service in Santa Rosa County?

- ☐ Yes
☐ No

(9) If you answered yes to Question 8, what benefits of transit do you believe could occur as a result of additional service?

- ☐ Provide a more dependable source of transportation for me
- ☐ Allow better commuting options/access to job opportunities
- ☐ Be better for the environment
- ☐ Enhance tourism and other industries
- ☐ Enhance connectivity to military establishments

(10) If you answered yes to Question 8, select the type of service you would most like to see?

- ☐ More Frequent Bus Service
- ☐ Express Service, where? _____
- ☐ Later Service
- ☐ Increased Coverage Area where? _____
- ☐ Carpools/Vanpools
- ☐ Other, specify _____

(11) What do you think is a reasonable one-way fare to pay for transit service?

- | | |
|---|---|
| <input type="checkbox"/> \$0.00 to \$0.50 | <input type="checkbox"/> \$1.51 to \$2.00 |
| <input type="checkbox"/> \$0.51 to \$1.00 | <input type="checkbox"/> More than \$2.00 |
| <input type="checkbox"/> \$1.01 to \$1.50 | |

(12) Do you believe there is a willingness in the community to consider additional local funding for transit?

- | | |
|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> Definitely | <input type="checkbox"/> Not at all |
| <input type="checkbox"/> Somewhat | <input type="checkbox"/> Do not know |

(13) Are you willing to pay additional local taxes for an expanded transit system?

- | | |
|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> Definitely | <input type="checkbox"/> Not at all |
| <input type="checkbox"/> Somewhat | <input type="checkbox"/> Do not know |

(14) Your age is...

- | | |
|---|---|
| <input type="checkbox"/> Under 18 | <input type="checkbox"/> 45 to 64 years |
| <input type="checkbox"/> 18 to 24 years | <input type="checkbox"/> Over 65 years |
| <input type="checkbox"/> 25 to 44 years | |

(15) What is the range of your total household income for 2015?

- | | |
|--|--|
| <input type="checkbox"/> Less than \$10,000 | <input type="checkbox"/> \$40,000 - \$49,999 |
| <input type="checkbox"/> \$10,000 - \$19,999 | <input type="checkbox"/> \$50,000 - \$74,999 |
| <input type="checkbox"/> \$20,000 - \$29,999 | <input type="checkbox"/> \$75,000 or greater |
| <input type="checkbox"/> \$30,000 - \$39,999 | |

Please continue survey on the other side of this page.

(16) If you were going to consider using ECAT services in Santa Rosa, please rate how important each of the following aspects of transit service would be in your decision-making process.

	Very Important	Somewhat Important	Neutral	Not Very Important	Not Important At All
a. Days of service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Frequency (how often buses run)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Hours of service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Convenience of routes (where buses go)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Dependability of buses (on time)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Travel time on bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Cost of riding the bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Location of bus stops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Accessibility of bus passes (ease of purchase)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Availability of bus route information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. User-friendliness of bus information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Vehicle cleanliness and comfort	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
m. Bus stop cleanliness and comfort	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
n. Bus driver courtesy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
o. Safety/security on bus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
p. Safety/security at bus stops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Comments and Suggestions



ECAT WANTS YOUR INPUT!



ECAT 10-Year Transit Development Plan

Public Transit Workshops

Escambia County Area Transit (ECAT) is planning for its future, and we want your input! Please stop by any time during the following two public workshops and let us know how you think ECAT should grow.

Public Workshop #1

Monday, February 22, 2016 (5 PM - 6:30 PM)

**Pensacola State - Warrington Campus
Building 3700 - McMillan Auditorium**

5555 US Highway 98

Pensacola, FL 32507

ECAT Bus Routes 44, 55, 58, 59A*

Public Workshop #2

Wednesday, February 24, 2016 (5:30 PM - 7 PM)

West Florida Public Library

239 North Spring Street

Pensacola, FL 32502

ECAT Bus Routes 2, 44, 48*

**If needed, transportation will be provided for workshop attendees immediately following the workshop. Please contact ECAT at (850) 595-3228 for arrangements.*

If you are unable to attend one of the workshops, written comments will be accepted through March 4, 2016, and may be sent to:

ECAT

Attn: TDP Project Manager

1515 W. Fairfield Drive

Pensacola, FL 32503

(850) 595-3228

ECAT@myescambia.com

SPECIAL ACCOMMODATIONS

Any person requiring special accommodations to attend or participate, pursuant to the Americans with Disabilities Act, should contact ECAT within at least three (3) business days before the meeting at (850) 595-3228.

For additional ECAT route and schedule information, please contact ECAT at (850) 595-3228 or www.goecat.com.



ESCAMBIA COUNTY AREA TRANSIT

Florida-Alabama
TPO
Transportation Planning Organization





ECAT Quiere Su Opinión!

TALLERES DE NECESIDADES DE TRÁNSITO

Plan de 10 Años para el Desarrollo del Transporte Público—Talleres al Público

Usted está invitado a asistir a un taller público para revisar los resultados de la participación comunitaria de *Connections 2026* y dar su opinión sobre el plan borrador de los necesidades de tránsito de 10 años. Por favor pase por cualquier momento durante los siguientes dos talleres públicos para darnos su opinión.

Taller Público #1

Martes, 31 de mayo del 2016 (4:30 PM - 6 PM)

West Florida Genealogy Library

5740 N. 9th Ave.

Pensacola, FL 32504

(Rutas de autobuses ECAT 31, 43, 52, 63)*

Taller Público #2

Miércoles, 1 de junio del 2016 (4:30 PM - 6 PM)

West Florida Public Library

239 North Spring Street

Pensacola, FL 32502

(Rutas de autobuses ECAT 2, 31, 41, 44, 48, 58)*

**De ser necesario, se proporcionará transporte para los asistentes inmediatamente después del taller. Por favor, llame ECAT al (850) 595-3228 para detalles/arreglos.*



Si usted no puede asistir a uno de los talleres, puede enviar sus comentarios por escrito antes del 17 de junio del 2016 a esta dirección:

ECAT

Attn: TDP Project Manager

1515 W. Fairfield Drive

Pensacola, FL 32503

(850) 595-3228

ECAT@myescambia.com

ACOMODACIONES ESPECIALES

Cualquier persona que necesite alojamientos especiales para asistir o participar, de conformidad con el Acta de Americanos con Discapacidades, debe ponerse en contacto con ECAT al menos tres (3) días hábiles antes del taller llamando al (850) 595-3228.



ECAT Wants Your Input!

TRANSIT NEEDS PLAN WORKSHOPS

ECAT Transit Development Plan Public Workshops

You are invited to attend a public workshop to review findings from the previous *Connections 2026* TDP public outreach and provide input on the draft 10-year TDP transit needs plan. Please stop by any time during the following two public workshops to let us know your input!

Public Workshop #1

Tuesday, May 31, 2016 (4:30 PM - 6 PM)

West Florida Genealogy Library

5740 N. 9th Ave.

Pensacola, FL 32504

(ECAT Bus Routes 31, 43, 52, 63)*

Public Workshop #2

Wednesday, June 1, 2016 (4:30 PM - 6 PM)

West Florida Public Library

239 North Spring Street

Pensacola, FL 32502

(ECAT Bus Routes 2, 31, 41, 44, 48, 58)*

**If needed, transportation will be provided for workshop attendees immediately following the workshop. Please contact ECAT at (850) 595-3228 for arrangements.*



If you are unable to attend one of the workshops, written comments will be accepted through June 17, 2016, and may be sent to:

ECAT

Attn: TDP Project Manager

1515 W. Fairfield Drive

Pensacola, FL 32503

(850) 595-3228

ECAT@myescambia.com

SPECIAL ACCOMMODATIONS

Any person requiring special accommodations to attend or participate, pursuant to the Americans with Disabilities Act, should contact ECAT within at least three (3) business days before the meeting at (850) 595-3228.



TEN-YEAR TRANSIT NEEDS SURVEY
ECAT Transit Development Plan
May - June 2016 Public Workshops

Please take a minute to help us plan for transit needs in Escambia County!

- 1) Please tell us how you rate each of the following potential service improvements.

	Very Favorable		Neutral		Not Very Favorable
<u>Expand Existing Transit Service</u>					
Double frequency (on Routes 1, 2, 32, 43, 52, 55)	5	4	3	2	1
Add later service (until 10 pm)	5	4	3	2	1
Increase Saturday frequency	5	4	3	2	1
Add Sunday service (on Routes 2, 32, 45, 52, 55)	5	4	3	2	1
Extend Route 47	5	4	3	2	1
Better sidewalk connections to bus stops	5	4	3	2	1
Add more bus shelters and benches	5	4	3	2	1
<u>Add New Transit Services</u>					
Navy Federal Connector	5	4	3	2	1
Pensacola-Navarre Connector	5	4	3	2	1
Pensacola-Milton Express	5	4	3	2	1
Navy Federal-Downtown Express	5	4	3	2	1
Orange Beach-Pensacola Limited Express	5	4	3	2	1
Water Ferry	5	4	3	2	1
Cantonment Flex	5	4	3	2	1
Add Park-and-Ride	5	4	3	2	1

2) Please circle the top three (3) major roads or areas for more transit service improvements.

9 Mile Road	N 9th Avenue	N Davis Drive	Cervantes Street
Gulf Beach Highway	Milton	Pace	Orange Beach, AL
Navarre	Naval Air Station	Century	Lillian, AL
Other (please identify)			

Please explain what improvements are needed to the roads/areas you identified above.

General Comments and Suggestions

THANK YOU FOR YOUR COOPERATION!
PLEASE RETURN YOUR SURVEY TO THE PUBLIC WORKSHOP ATTENDANTS.



Appendix D:

Recommended Performance Monitoring Program

Performance Measures and Indicators

Once the recommended transit services are implemented, the following fixed- and flex-route performance indicators and measures should be monitored by Escambia County on a quarterly basis as part of the recommended performance monitoring program:

- **Passenger Trips** – Annual number of passenger boardings on the transit vehicles.
- **Revenue Miles** – Number of annual miles of vehicle operation while in active service (available to pick up revenue passengers).
- **Revenue Hours** – Total hours of operation by revenue service in active revenue service.
- **Passenger Trips per Revenue Mile** – Ratio of passenger trips to revenue miles of service. This is the key indicator of service effectiveness that is influenced by the levels of demand and the supply of service provided.
- **Passenger Trips per Revenue Hour** – Ratio of passenger trips to revenue hours of operation.

However, as fixed-route-type services typically take up to three years to become established and productive, the performance data up to that point should be reviewed and interpreted cautiously. Although adjustments/modifications may occur, outright discontinuations based on performance monitoring data alone are discouraged.

Evaluation Methodology and Process

This process is based on two measures, trips per mile and trips per hour, which are weighted equally to derive an overall route score. A route's score for a particular measure is based on a comparison of the measure as a percentage of the system average for that particular measure. These individual measure scores are added together and divided by 2 to get a final aggregate score. This final composite performance score is an indication of a route's performance for all three measures when compared to the system average for those measures. A higher score represents better overall performance when compared to other routes.

The noted comparative performance evaluation can be beneficial, but care should be taken when using the final scores and rankings, because these figures are comparing routes to one another and may not reflect the specific goals established for a particular route (i.e., geographic coverage vs. ridership performance). The process is particularly useful, however, in highlighting those routes that may have performance-related issues. These routes can then be singled out for closer observation in future years to determine specific changes that may help mitigate any performance issues.

Once a route score is determined, routes can be ranked to show the highest performing and lowest performing routes. The rankings are a useful proxy for determining the comparative performance of any route, as well as highlighting changes in performance over time. To track the performance variation over time, three performance levels have been developed:

- **Level I – Good ($\geq 75\%$)** – Transit routes in this category are performing efficiently compared with the average level of all the agency’s routes.
- **Level II – Monitor (30–74%)** – Routes in this category exhibit varying levels of performance problems and need more detailed analysis (e.g., ridechecks, on-board surveys, increased marketing efforts, etc.) to aid in identifying specific changes that can be made to help improve the route’s performance.
- **Level III – Route Modification or Discontinuation ($\leq 29\%$)** – Routes in this category exhibit poor performance and low efficiency. Recommendations for these routes may include truncation of the route, reduction in the route’s number of revenue hours, or discontinuation of the route.

Figure D-1 illustrates the three evaluation levels and notes the recommended thresholds for each level.

Figure D-1: Route Performance Evaluation Levels

