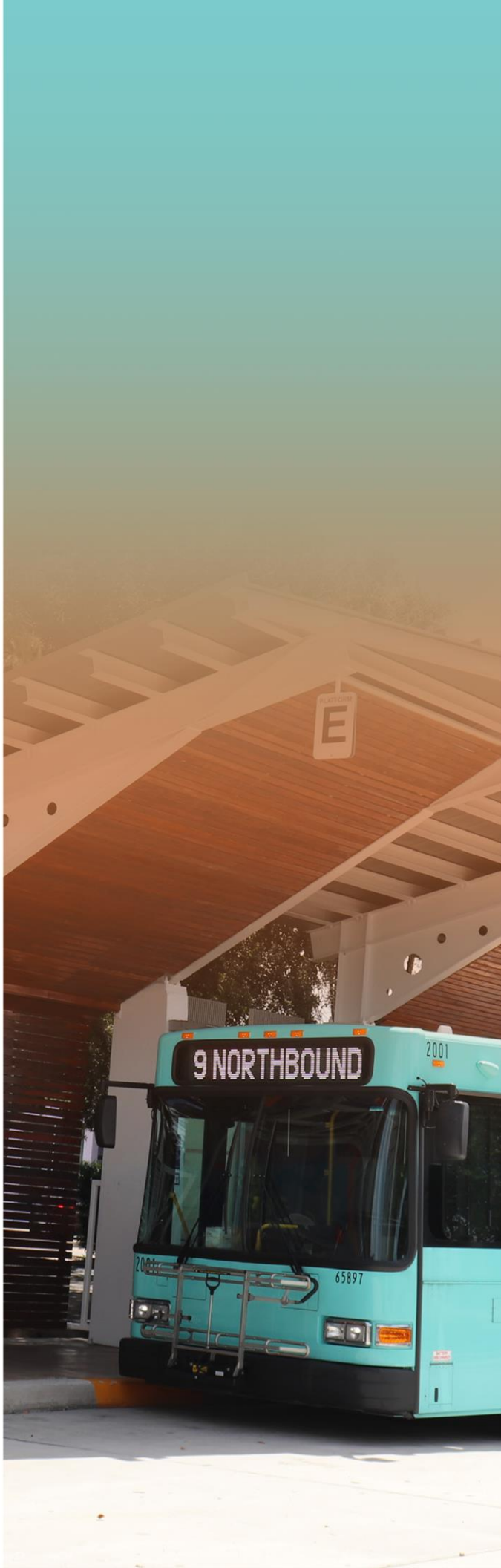
Manatee County Area Transit

Transit Development Plan Major Update (2024-2033)

Final Report

August 2023



Prepared by

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List of Acronyms

ADA	Americans with Disabilities Act
AADT	Annual Average Daily Traffic
ACS	American Community Survey
APR	Annual Progress Report
APTA	American Public Transportation Association
ARPA	American Rescue Plan Act
BEBR	Bureau of Economics and Business Research
BoCC	Board of County Commissioners
BRT	Bus Rapid Transit
COA	Comprehensive Operations Analysis
CTC	Community Transportation Coordinator
DOR	Department of Revenue
DTA	Density Threshold Assessment
FAC	Florida Administrative Code
FCTD	Florida Commission for the Transportation Disadvantaged
FDOT	Florida Department of Transportation
FSUTMS	Florida Standard Urban Transportation Model Structure
FTA	Federal Transit Administration
FTIS	Florida Transit Information System
FTP	Florida Transportation Plan
GTFS	General Transit Feed Specification
ITE	Institute of Transportation Engineers
ITS	Intelligent Transportation Systems
LEP	Limited English Proficiency
LOS	Level of Service
LRTP	Long Range Transportation Plan
MCAT	Manatee County Area Transit
MOD	Mobility on Demand
MPO	Metropolitan Planning Organization
NTD	National Transit Database
PD&E	Project Development and Environment
PIP	Public Involvement Plan
SS4A	Safe Streets and Roads for All
TAM	Transit Asset Management
TAZ	Traffic Analysis Zone
TBEST	Transit Boardings Estimation and Simulation Tool
TD	Transportation Disadvantaged
TDP	Transit Development Plan
TDSP	Transportation Disadvantaged Service Plan
TOI	Transit Orientation Index
TSP	Transit Signal Priority
USDOT	US Department of Transportation
VOMS	Vehicles operated in maximum service

1.0 Introduction

This Transit Development Plan (TDP) major update was initiated by Manatee County Area Transit (MCAT) to refine a strategic guide for public transportation in the community over the next 10 years. The TDP represents the community's vision for public transportation in its service area. A major TDP update also allows transit agencies to outline actions to be taken in the following year and set goals for subsequent years. As a strategic plan, the TDP identifies needs in an unconstrained fashion and highlights service improvements for which currently there is no funding. This major update covers the 10-year planning horizon from FY 2024 to FY 2033.

Plan Objectives

The main purpose of this study is to update the TDP for transit services in Manatee County and its connectivity to adjacent areas, as currently required by State law. Upon completion, the 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

As a recipient of State Public Transit Block Grant funds, the Florida Department of Transportation (FDOT) requires a major update of Manatee County's TDP every five years to ensure that the provision of public transportation is consistent with the mobility needs of the local communities. 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. MCAT's service area is within the metropolitan planning area boundaries of the Sarasota/Manatee MPO.
- FDOT, the Regional Workforce Development Board, and the MPO 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, 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. The farebox recovery ratio report is located in Appendix A.

TDP Checklist

This 10-year plan meets the requirements for a TDP Major Update in accordance with Rule Chapter 14-73, F.A.C. To best illustrate this compliance, Table 1-1 presents a list of TDP requirements from Rule 14-73.001 and indicates where each item is located in this 10-year plan.

Table 1-1: TDP Checklist

Public Involvement Process		TDP Section
✓	FDOT-approved TDP Public Involvement Plan (PIP)	4 & Appendix D
✓	Opportunities for public involvement outlined in PIP	4 & Appendix D
✓	Solicitation of comments from the regional workforce board (RWB) and/or MPO	4
✓	Notification to FDOT, RWB, and MPO about public meetings	4 & Appendix D
✓	Provision of review opportunities to FDOT, RWB, and MPO	4
Situation Appraisal		
✓	Plans and policy review	5
✓	Land use	5
✓	Socioeconomic trends	5
✓	Organizational issues	5
✓	Technology	5
✓	Transit-friendly land use and urban design efforts	5
✓	10-year ridership projections	7
✓	Farebox Recovery Report	3 & Appendix A
Mission and Goals		
✓	Mission and vision	6
✓	Goals and objectives	6
Alternative Courses of Action		
✓	Documentation of development of transit alternatives	8
✓	Documentation of evaluation of transit alternatives	8
Implementation Program		
✓	10-year program of improvement strategies and policies	9
✓	Maps indicating areas to be served and types and levels of service	9
✓	10-year financial plan showing funding sources and expenditures of funds	9
✓	Documentation of monitoring program to track performance	9 & Appendix F
✓	Implementation plan with projects and/or services needed to meet the goals and objectives in the TDP	9
✓	List of unfunded needs	9
Relationship to Other Plans		
✓	Consistent with Florida Transportation Plan	5
✓	Consistent with local government comprehensive plan	5
✓	Consistent with regional transportation goals and objectives	5
Submission		
✓	Adopted by Board of County Commissioners	August 22, 2023
✓	Submitted to FDOT (by September 1, 2023)	August 23, 2023

Organization of the Report

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

Section 3 summarizes **Operating Conditions** within the county. The section begins with a review of all current and planned public transportation services and facilities provided by MCAT, including headways, hours of operation, fare structure, ridership trends, planned transit services, transportation disadvantaged services, facilities, and a vehicle inventory. Next, a review of other transit and transportation services available in both Manatee County and the region is provided. Also included in this section is a Trend and Peer Review Analysis using the most recent National Transit Database (NTD) information from the Federal Transit Administration (FTA).

Section 4 summarizes the extensive **Public Involvement** activities completed for this TDP effort. The results of these outreach activities are reviewed in full and leveraged in subsequent efforts in the MCAT TDP that identify, evaluate, and prioritize the public transportation needs for Manatee County.

Section 5 includes the **Situation Appraisal**. This section reviews the current overall planning and policy environment within the county to better understand transit needs. This effort examines the strengths and weaknesses of the system as well as any existing threats to the provision of service in the county and key opportunities for addressing those threats and/or enhancing the transit-friendliness of the operating environment. Included in this section are reviews of existing socioeconomic trends, travel behavior, land use, public involvement, peer review/trend analysis, technology, and funding. Also included in this section is a review of plans and policies. Selected local plans from the last eight years were examined for relevance to current operating conditions. Pertinent regional and State plans were also considered in this process.

Section 6 sets forth **Goals and Objectives** to serve as a policy guide for implementation of the MCAT TDP. A review and update of the existing service, policy, and financial goals and objectives for the public transit services was completed to match the goals of the local community with respect to transportation and land use.

Section 7 presents the results of a **Transit Demand Assessment**. This section summarizes the various demand and mobility needs assessments conducted as part of the MCAT TDP. The assessment techniques for forecasting ridership are summarized, followed by the results of each analysis.

Section 8, titled **Transit Needs Development and Evaluation,** presents a list of transit needs in the form of service needs and capital/infrastructure needs. Also in this section is a description of the alternatives evaluation methodologies used to develop and assess the transit alternatives, or proposed improvement types, identified for the MCAT TDP. These proposed alternatives represent

the transit needs for the next 10 years developed without consideration of funding constraints. The identified service improvements are prioritized using an evaluation process developed to assess and phase the transit service alternatives. The resulting ranking of alternatives is used to develop the 10-year implementation plan presented in Section 9.

Section 9 summarizes the **10-Year Transit Plan** developed for MCAT's fixed-route bus transit services. 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 10 summarizes the techniques and approaches to help facilitate **Plan Implementation and Coordination** after TDP adoption. This includes strategies to make use of the various relationships, tools, and outreach materials from the TDP process to continue building support for the implementation of the 10-year TDP.

2.0 Baseline Conditions

This section reviews the study area in the context of the TDP and documents existing base data to gain an understanding of the environment in which the transit system is operating. Transit service functions best in an environment when it responds appropriately to the regulatory, geographic, environmental, land use, developmental, political, and socio-economic factors present within the operating service area. All these factors impact the provision of services, so it is critical for transit service providers to understand them. These baseline conditions will help provide a foundation upon which the agency will be able to evaluate opportunities for the development of future transit services as well as address any potential challenges that may hinder the agency's objectives.

The following components were reviewed for consideration in the baseline conditions:

- Physical description of service area
- Population characteristics and trends
- Demographic characteristics and trends, including auto ownership
- Population, housing, and employment/labor information and related densities
- Current and future land use and densities
- Journey-to-work data
- Current and future land use and densities
- Major activity centers, employers, proposed DRIs, and other trip generators
- Tourist and visitor levels
- Travel behavior and commuting trends
- Roadway and traffic conditions including level of service and current/projected capacity deficiencies
- Existing sidewalk inventory
- Current and planned transit routes/services and transportation corridor initiatives

A series of maps, figures, and tables illustrate selected population, demographic, and socioeconomic characteristics. Data for the baseline conditions are gathered from various primary sources including the U.S. Census, American Community Survey (ACS), American Housing Survey, Longitudinal Employer Household Dynamics, and data provided by the Sarasota/Manatee MPO, FDOT District 1, the Bureau of Economics and Business Research (BEBR) of the University of Florida, and other supplemental data available from local and regional agencies.

Study Area Overview

Manatee County is located in central Florida and is bordered on the north by Hillsborough County and the greater Tampa Bay urbanized region, on the east by Hardee and DeSoto counties, on the south by Sarasota County, and on the west by the Gulf of Mexico. There are six incorporated municipalities: the cities of Anna Maria, Bradenton, Bradenton Beach, Holmes Beach, and Palmetto, and the Town of Longboat Key. Like much of the State of Florida, Manatee County has a predominantly flat terrain with the northern, eastern, and southeastern portions dominated by agricultural uses. The rural communities of Myakka City, Parrish, and Duette are among the few

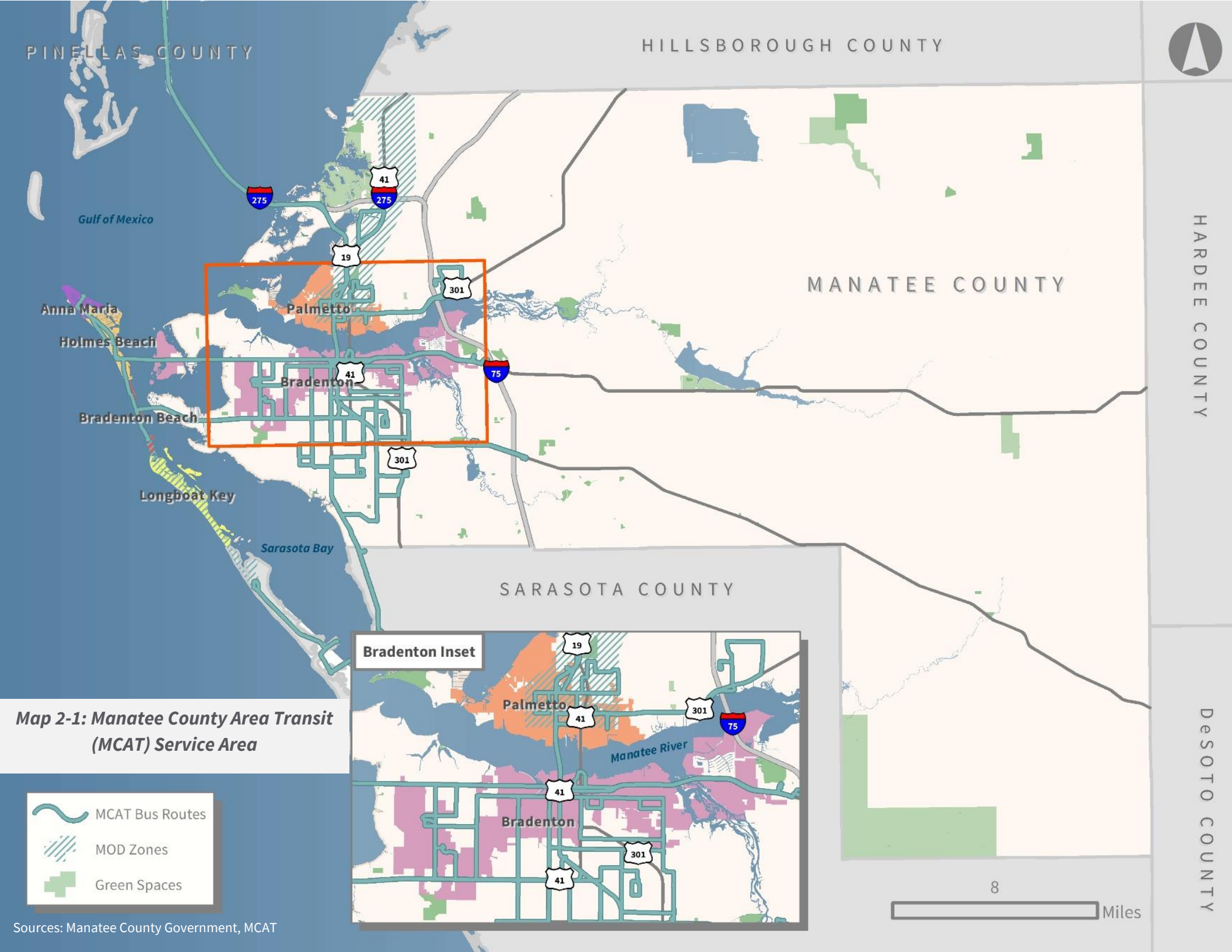
unincorporated communities in this part of the county. The western and southwestern portions, which are closer to the Gulf of Mexico, are more characteristically urban or suburban. The barrier islands on the westernmost edge of Manatee County are home to various beach communities. This western, urbanized third of the county sits roughly west of I-75, and is characteristically distinct from the eastern, rural two-thirds of the county, which is generally east of I-75.

Bradenton is the largest incorporated municipality in Manatee County as well as its county seat. Bradenton has a population of 57,346 residents per the 2020 American Community Survey (ACS) Five-Year Estimates and sits on the southern banks of the Manatee River. Approximately 21.5% of Manatee County's population lives in an incorporated area, concentrated primarily near the coast between Bradenton and the Sarasota County line. The remaining population resides in the unincorporated parts of the county. Map 2-1 presents a physical representation of Manatee County and its municipal areas alongside the existing MCAT transit network.

The unincorporated communities of Samoset, South Bradenton, and West Samoset can be found near Bradenton and have significant populations. Together with Bradenton and Palmetto, these communities represent the county's largest concentration of urban development and population.

Farther south of these communities, close to the Sarasota County line and on the shores of Sarasota Bay, the residential unincorporated communities of Bayshore Gardens and Whitfield make up the southern sector of the urbanized third of Manatee County. The unincorporated areas to the north of Palmetto include the communities of Ellenton, Parrish, and Memphis, which are characterized by low-density residential development. To the west of Bradenton, the unincorporated communities of West Bradenton and Cortez are growing in population.

East of I-75 is the unincorporated community of Lakewood Ranch, a larger suburban area in Manatee County with significant developmental importance. Lakewood Ranch spans most of the east side of I-75 south of Manatee River and into the northern portion of Sarasota County. The development is marketed as a community of villages with various housing styles and many amenities. Communities such as Lakewood Ranch are attracting large numbers of new residents in a county that is currently among the top-ranking counties in Florida in terms of population growth. This rapid rate of growth is most observable east of I-75, an area of Manatee County that was previously undeveloped. Growth management has been enshrined in Manatee County's Comprehensive Plan in the form of an urban development boundary which is roughly six to eight miles east of I-75. By implementing this measure, Manatee County wishes to ensure that the eastern part of the county maintain a rural character and promote infill development in the western part of the county.



Map 2-1: Manatee County Area Transit (MCAT) Service Area

Sources: Manatee County Government, MCAT

Population Profile

Population data from the 2000 and 2010 U.S. Decennial Census and the 2020 ACS 5-Year Estimates were used to develop a population profile for the study area. Table 2-1 shows the population characteristics of Manatee County.

Table 2-1: Manatee County Population Trends

Metrics	2000	2010	2020	2010-2020 % Change	2000-2020 % Change
Population	264,002	318,619	393,847	24%	49%
Households	112,456	131,200	150,345	15%	17%
Workers	117,077	127,401	175,599	38%	50%
Land Area (sq. miles)[1]	742.8	742.8	742.8	0%	0%
Population per sq. mile	355.4	428.9	530.2	24%	49%
Households per sq. mile	151.4	232.5	202.4	-13%	34%
Workers per sq. mile	157.6	171.5	236.4	38%	50%

Sources: 2000 and 2010 Census, 2020 ACS 5-Year Estimates

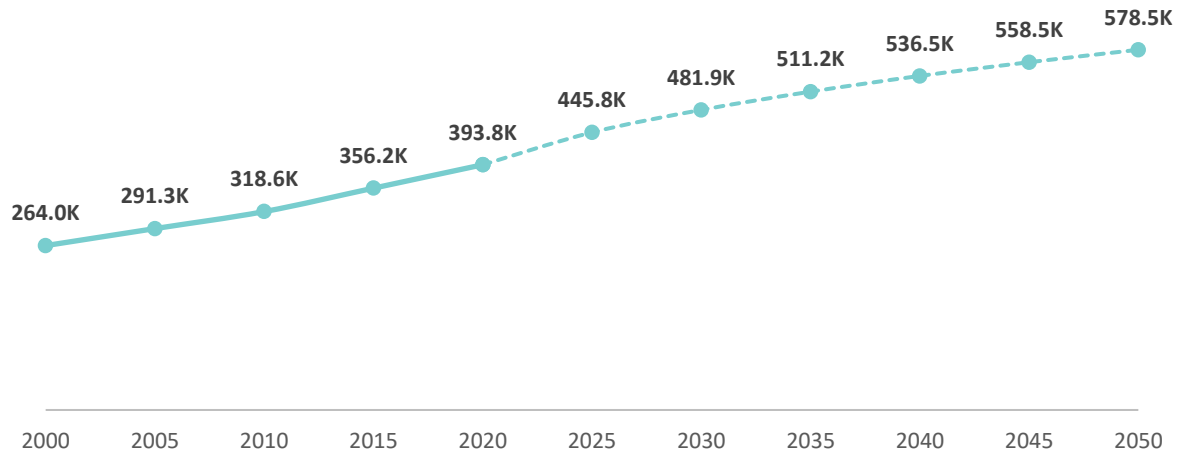
[1]U.S. Census Bureau TIGER/Line Data

The population of Manatee County increased by 49% between 2000 to 2020, with 24% growth occurring between 2010 to 2020. The 2020 figures do not fully reflect the impact of the COVID-19 pandemic, which has triggered significant changes in population trends due to the ability of many people to work remotely. The more prominent change has been a vast increase in the population due to a large migration into Florida from other states.

Projected Population Growth

The *2024 Florida Statistical Abstract*, prepared by BEBR at the University of Florida, indicates a projected population growth to 445,800 by 2025, and 511,200 by 2035. Figure 2-1 provides population projections using the medium tier of estimates from BEBR for Manatee County through 2050. The population growth rate is expected to slow down from 8.1% in 2030 to 3.6% in 2050.

Figure 2-1: Manatee County Projected Population Growth Trend



Sources: 2000 and 2010 Census, 2020 ACS 5-Year Estimates, 2024 BEBR Florida Statistical Abstract

City and Town Population Trends

A review of population trends for the six municipalities in Manatee County was conducted using the 2020 ACS 5-Year Estimates. Table 2-2 shows figures related to the population of Manatee County and its incorporated areas for 2010 and 2020.

Table 2-2: Incorporated Population Characteristics, Manatee County, 2010-2020

Location	2010		2020		%
	Population	Density (sq. mi.)	Population	Density (sq. mi.)	Change
Manatee County	318,619	428.8	393,847	530.1	23.6%
Anna Maria	1,475	1,475.0	1,087	1,087.0	-26.3%
Bradenton	50,533	3,368.9	57,346	3,823.1	13.5%
Bradenton Beach	1,452	1,452.0	902	902.0	-37.9%
Holmes Beach	4,136	2,068.0	4,276	2,138.0	3.4%
Longboat Key	6,896	1,379.2	7,299	1,459.8	5.8%
Palmetto	12,852	2,142.0	13,678	2,279.7	6.4%
Unincorporated	241,275	336.9	309,259	431.9	28.2%

Source: 2010 and 2020 ACS 5-Year Estimates

Among the incorporated areas of Manatee County, Bradenton has the highest population at 50,533, followed by Palmetto at 12,852. However, nearly 78.5% of the county's population lives in the various unincorporated communities of the county.

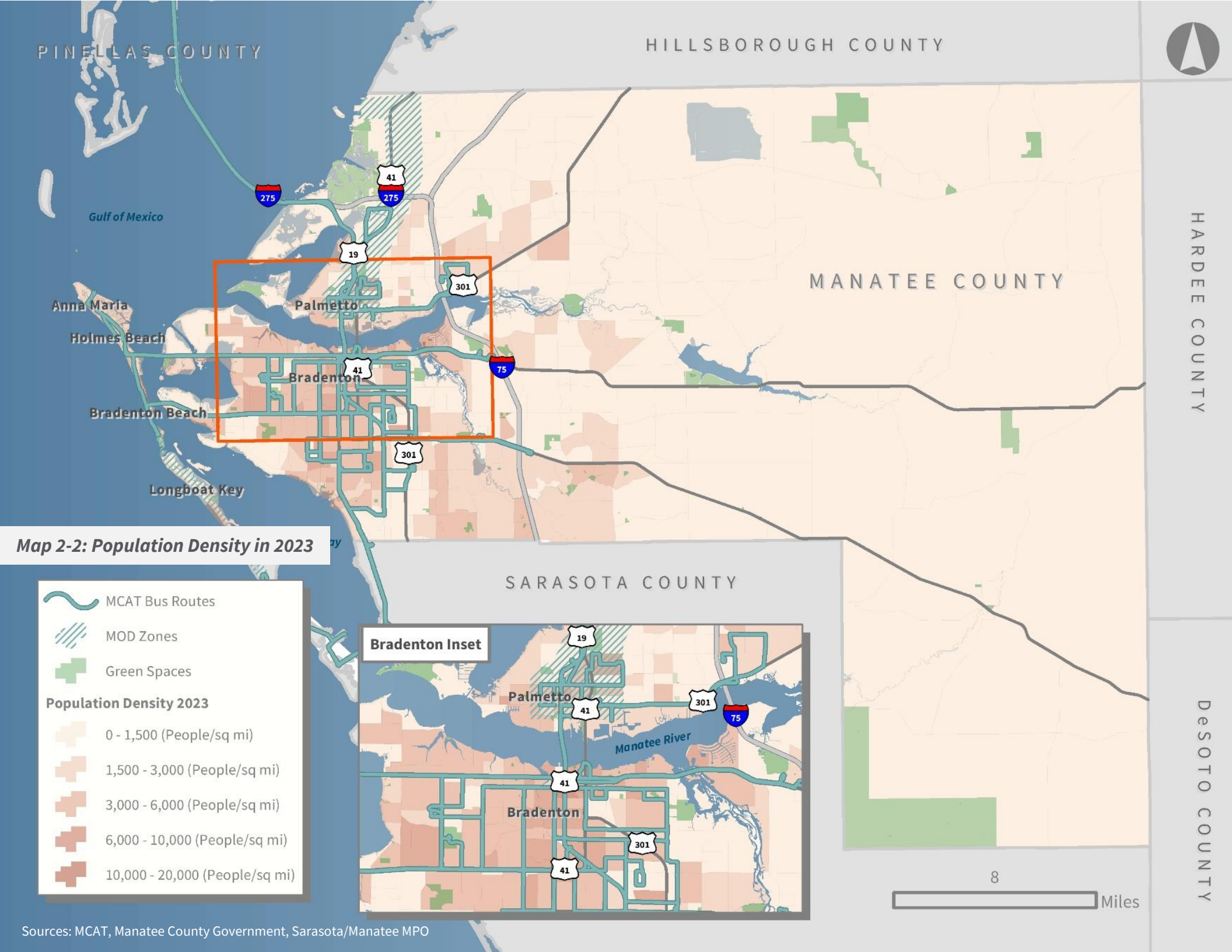
In terms of growth, Bradenton and Palmetto have both observed their populations increase by 13.5% and 6.4%, respectively, between 2010 and 2020. Additionally, Longboat Key and Holmes Beach show some population growth at 5.8% and 3.4%, respectively. Anna Maria and Bradenton Beach show a decrease in population growth with drops of 26.3% and 37.9%, respectively. The

greatest driver in the continued county-wide population growth comes from the unincorporated communities across the county, which observed a 28.2% increase in population between 2010 and 2020. This growth is primarily observed in the continued boom in suburban developments east of I-75. While there is growth in the urban, incorporated parts of the county, Manatee County continues to see growth as a primarily suburban community.

Population Density

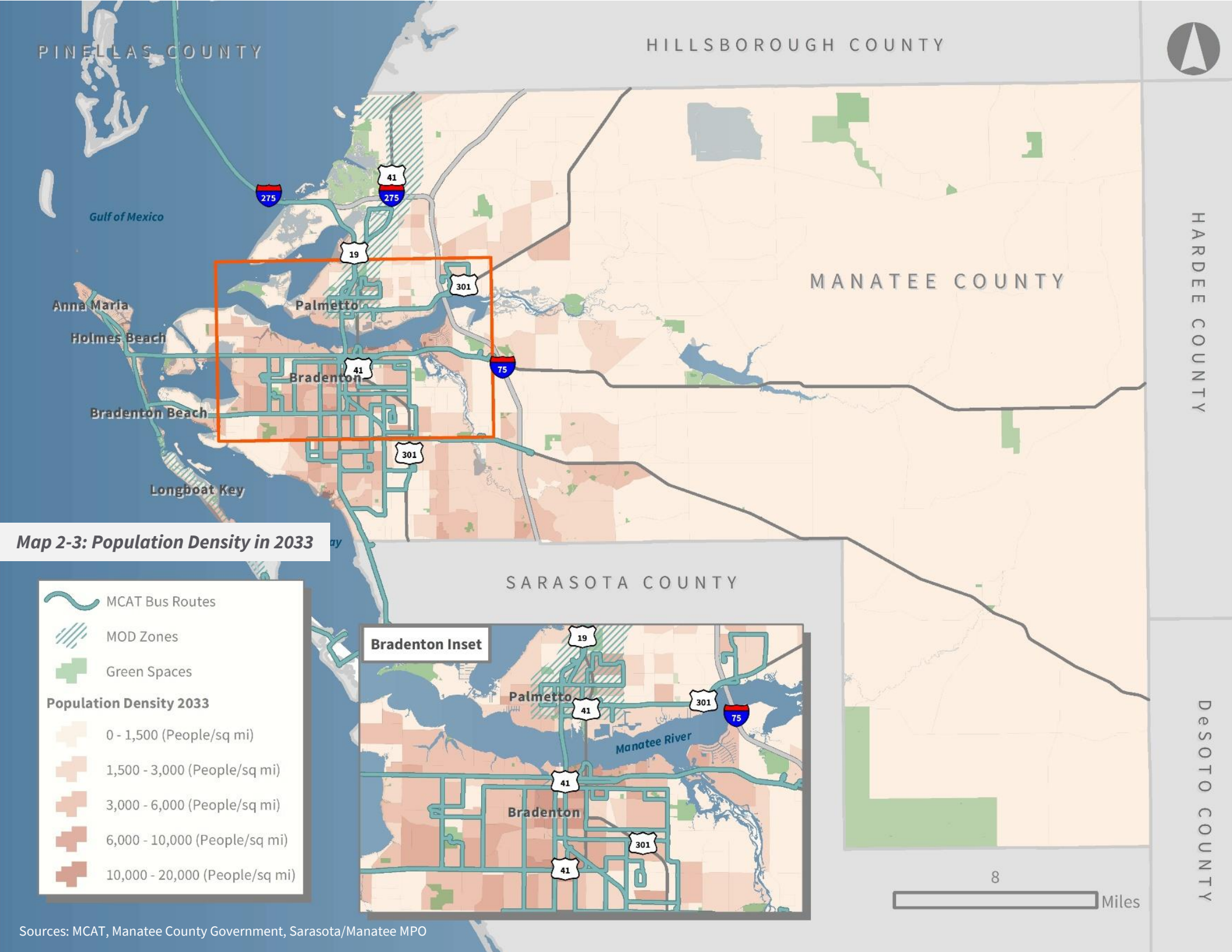
Population density is one of the key indicators of a healthy transit market. In terms of an area's transit market, areas of high population density have the capacity to provide more residents with greater opportunities for transit within the traditional ¼-mile distance from a single bus stop. Additionally, areas with high population density often are associated with uses that promote multimodal transit use and amenities that promote pedestrian and bicycle activity. Map 2-2 shows population densities by Traffic Analysis Zone (TAZ) for 2023, and Map 2-3 shows population densities by TAZ for 2033. Socioeconomic data forecasts were derived from the Transform 2045 Long Range Transportation Plan (LRTP) for Manatee and Sarasota counties.

Based on these maps, there is a general increase in population density expected in a few key areas. Bradenton's downtown, consistent with its plan for land use intensification in the area, can expect to see a growth in density within the next decade. Moreover, just south of downtown Bradenton, a greater population density can be observed along the length of the Cortez Road corridor, an area already zoned for higher intensities of residential development. Farther south, an increase in population density can be expected along University Parkway between Lockwood Ridge Road and Honore Avenue. Finally, slight increases in population density can be expected in Lakewood Ranch around the SR 70 corridor and Greenbrook Boulevard, as well as in the northern part of the county near the I-275 and I-75 interchange.



Map 2-2: Population Density in 2023

Sources: MCAT, Manatee County Government, Sarasota/Manatee MPO



Map 2-3: Population Density in 2033

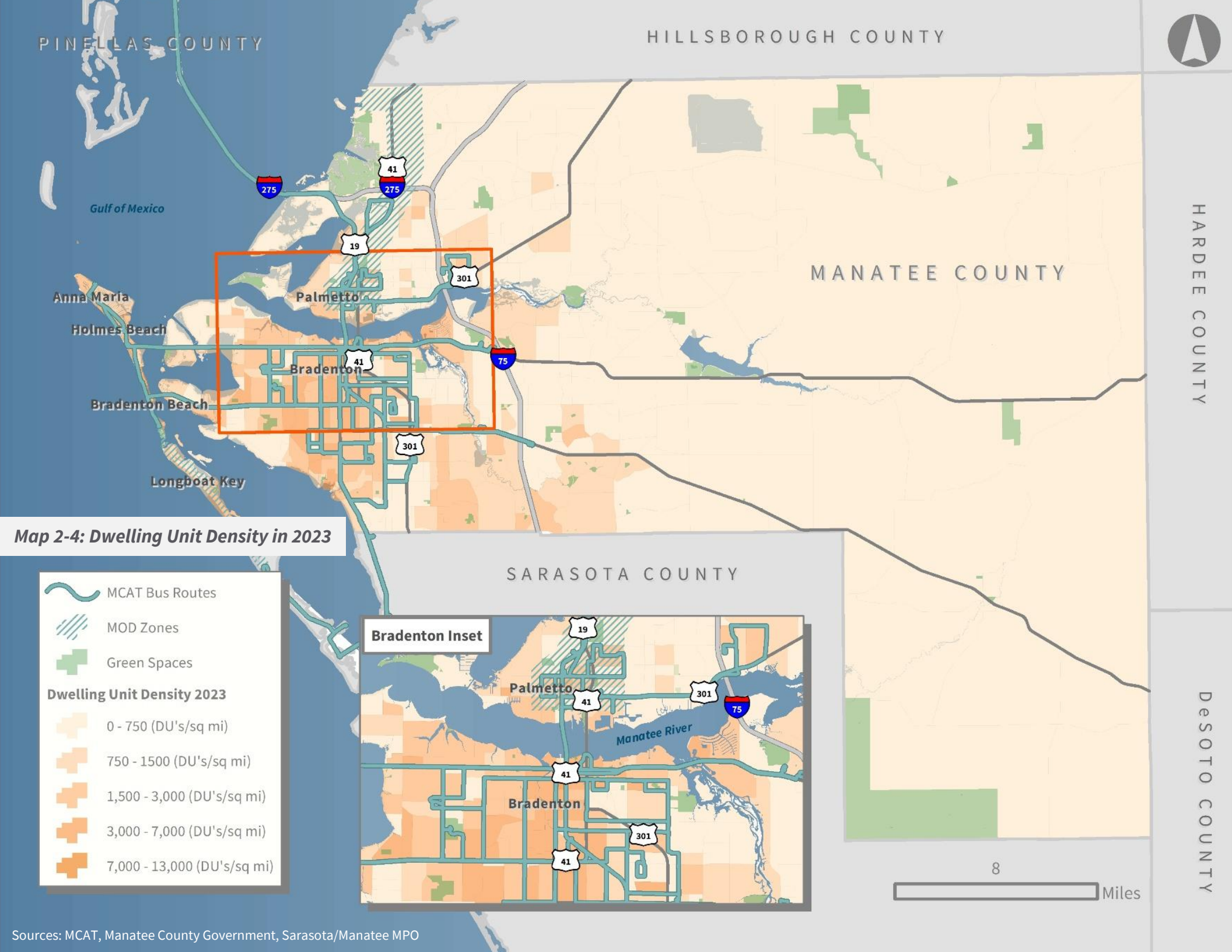
Sources: MCAT, Manatee County Government, Sarasota/Manatee MPO

Housing

Manatee County continues to grow in a significant manner, which is most noted by the continuous investment in housing developments in recent years. The continuous increase in housing attracts more new residents into the county and with it a greater demand for housing in the area. It is important, however, to distinguish suburban-style housing from urban housing, the former typically being lower in density compared to urban or multi-family housing. Considering that transit is often in greater demand in areas where housing density is higher, it is important to evaluate the housing densities that exist and that are projected in the county's future. Map 2-4 shows dwelling unit densities by TAZ for 2023 and Map 2-5 shows dwelling unit densities by TAZ for 2033.

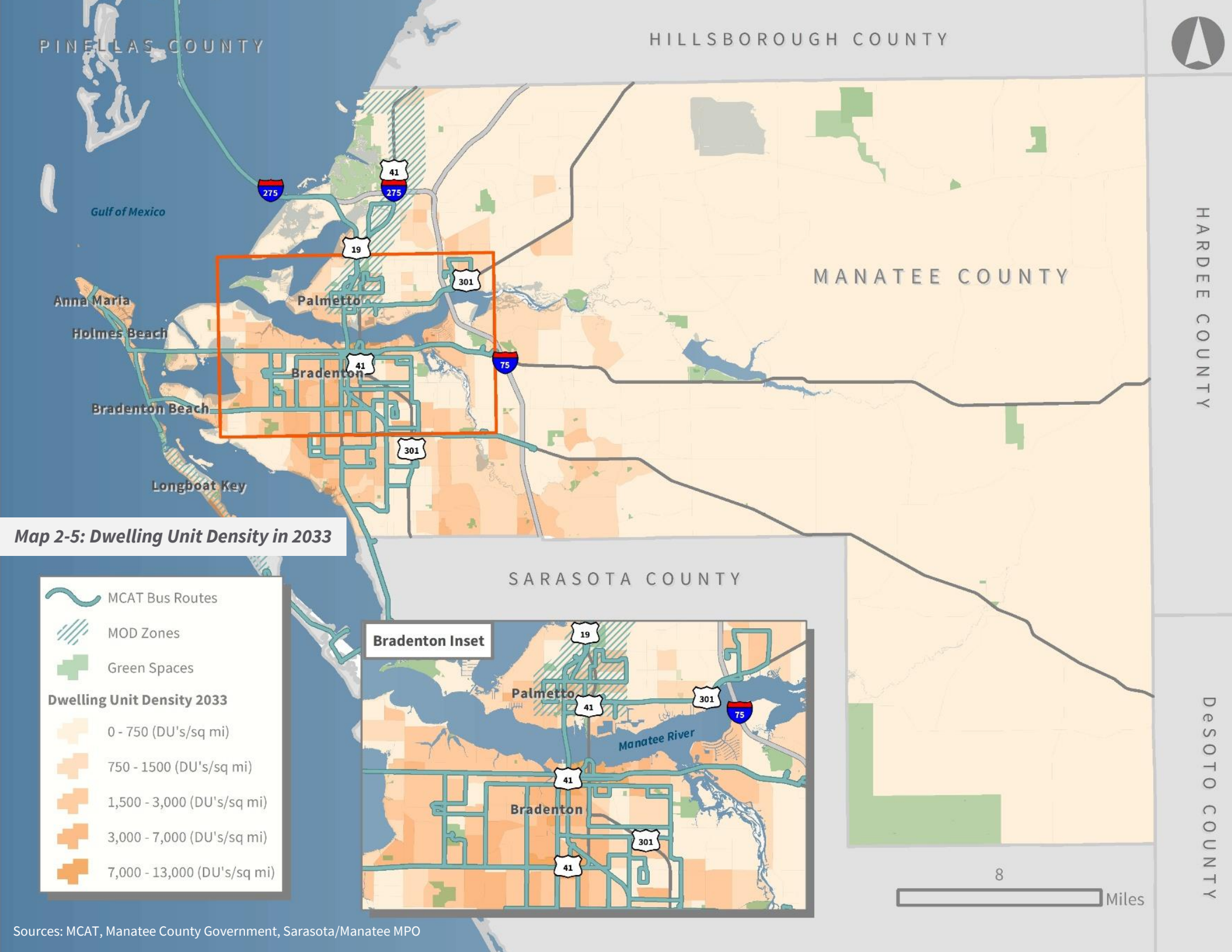
Dwelling units are expected to be added in downtown Bradenton, as well as along the riverside immediately east of Palmetto's downtown area. This area is zoned for planned communities and is expected to see an increase in residential development in the coming decade. The University Parkway corridor is also expected to see an increase in residential developments as well as the Lakewood Ranch area. Finally, the area off SR 64 near Rye Road is also expected to see an increase in dwelling units. This area, however, is mostly suburban in character and would not be expected to intensify much further.

The easternmost portion of Manatee County has a very low density of dwelling units, with only a few communities dotting large swaths of conservation land, such as Myakka City or Duette. The predominant housing style in this area is rural, with larger ranches built over acres of farmland, or single-family housing with great distances from each other.



Map 2-4: Dwelling Unit Density in 2023

Sources: MCAT, Manatee County Government, Sarasota/Manatee MPO



Map 2-5: Dwelling Unit Density in 2033

Sources: MCAT, Manatee County Government, Sarasota/Manatee MPO

Employment

Like housing and population, employment continues to grow in Manatee County. Table 2-3 presents data on the growth in the civilian labor force as well as the associated unemployment rate for Manatee County.

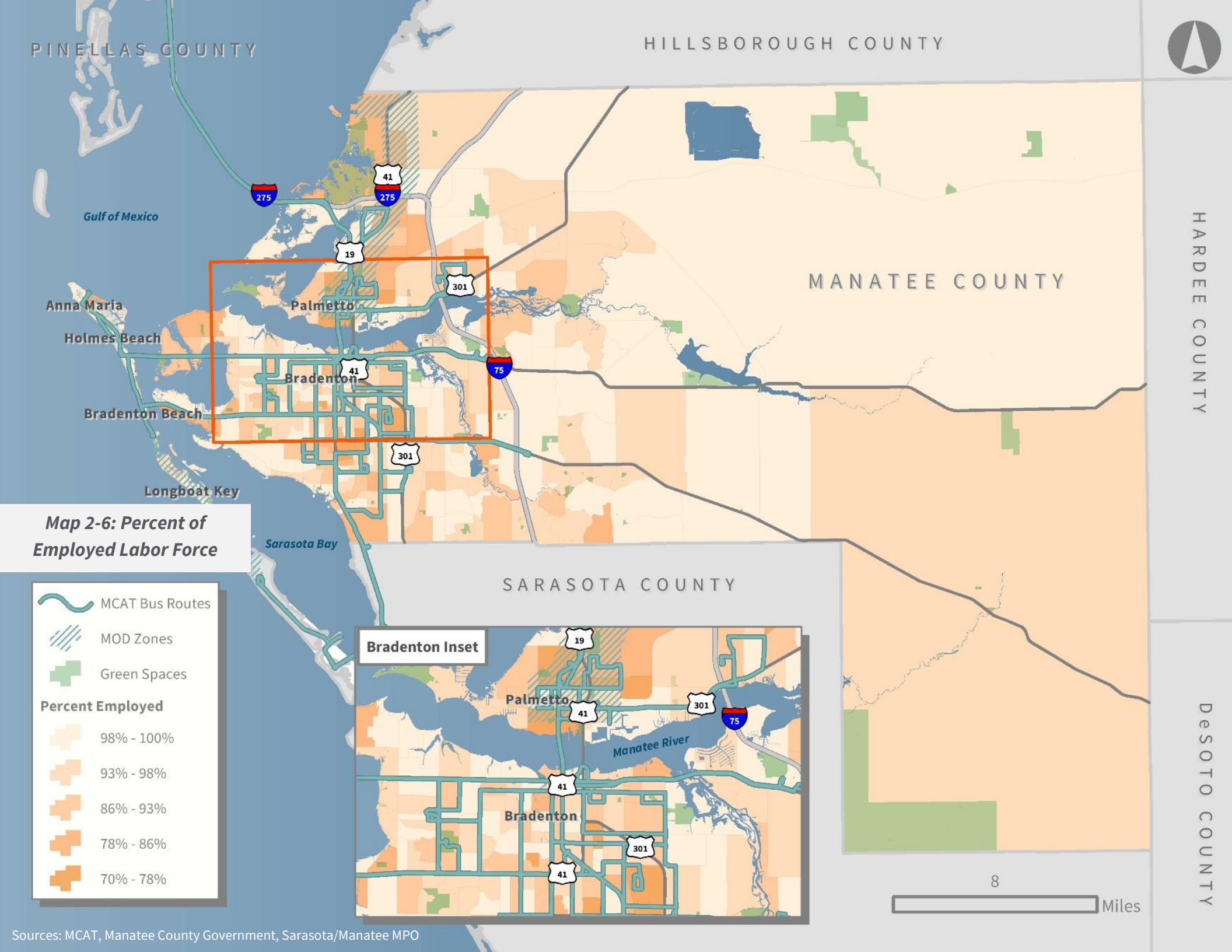
Table 2-3: Manatee County Employment Statistics

	2010	2020	Percent Change
In labor force	148,906	175,599	18.0%
Employed	135,533	165,297	22.0%
Unemployed	13,177	9,906	-24.8%
Unemployment Rate	8.8%	5.6%	-3.2%

Source: 2010 and 2020 ACS 5-Year Estimates

Between 2010 and 2020, the overall number of unemployed civilians in the labor force decreased from 8.8% to 5.6%. Along with this reduction in unemployment is an 18% increase in the number of civilians in the labor force between 2010 and 2020. These statistics indicate a positive growth in employment, in general. For any transit agency, it is important to follow the employment trends because a significant proportion of trips are related to employment. Map 2-6 shows the percentage of the population in the labor force in Manatee County who are employed according to 2020 ACS estimates.

Higher rates of unemployment can be observed in central Palmetto as well as just south of downtown Bradenton. Moreover, the US 41 corridor leading north from Palmetto to Port Manatee can also be observed as having a larger portion of the unemployed population. The 53rd Avenue West corridor is also observed as having a sizeable portion of unemployed labor force in the area west of US 301. Additionally, a high density in the amount of retirement homes and mobile homes in the area contribute to some degree to the unemployment rate.



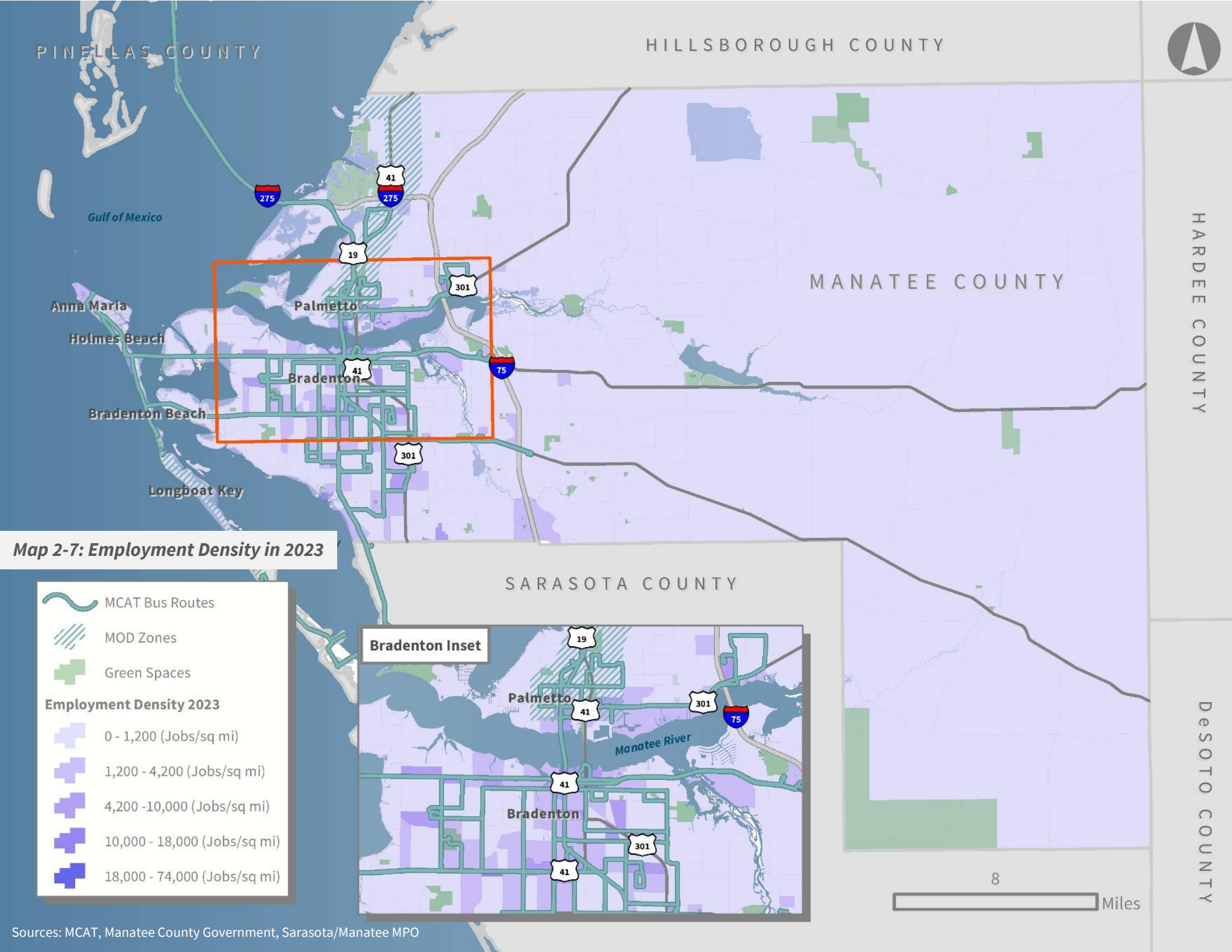
Map 2-6: Percent of Employed Labor Force

Sources: MCAT, Manatee County Government, Sarasota/Manatee MPO

Employment Density

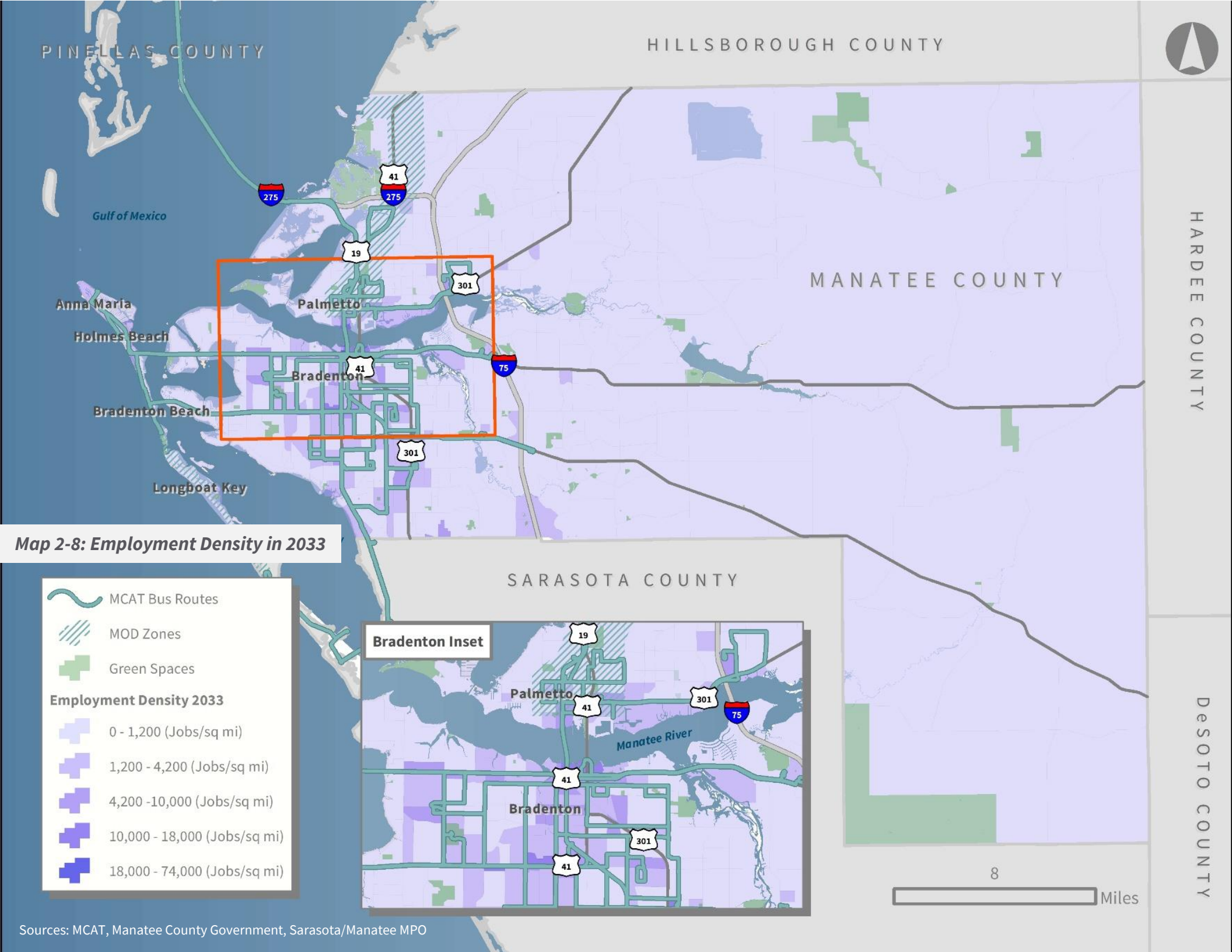
Transit demand is correlated with higher employment densities since more work trips are generated in areas with greater employment density, and traditionally, transit has been used significantly for home-to-work purposes. Employment density is determined as the number of jobs per square mile. Maps 2-7 and 2-8 graphically display employment density by TAZ for 2023 and 2033, respectively, using socioeconomic data forecasts from the 2045 Sarasota and Manatee Counties LRTP. These maps help identify areas for projected growth in employment throughout Manatee County.

Job growth is expected in downtown Bradenton and central Palmetto. Moreover, the area along US 41 south of the downtown area as well as the Cortez Road corridor are expected to see an increase in employment density in the coming decade. A stretch of commercial zones along Manatee Avenue, west of 63rd Street West, shows increasing employment density. However, for the most part, employment density will remain similar to current levels over the coming decade.



Map 2-7: Employment Density in 2023

Sources: MCAT, Manatee County Government, Sarasota/Manatee MPO



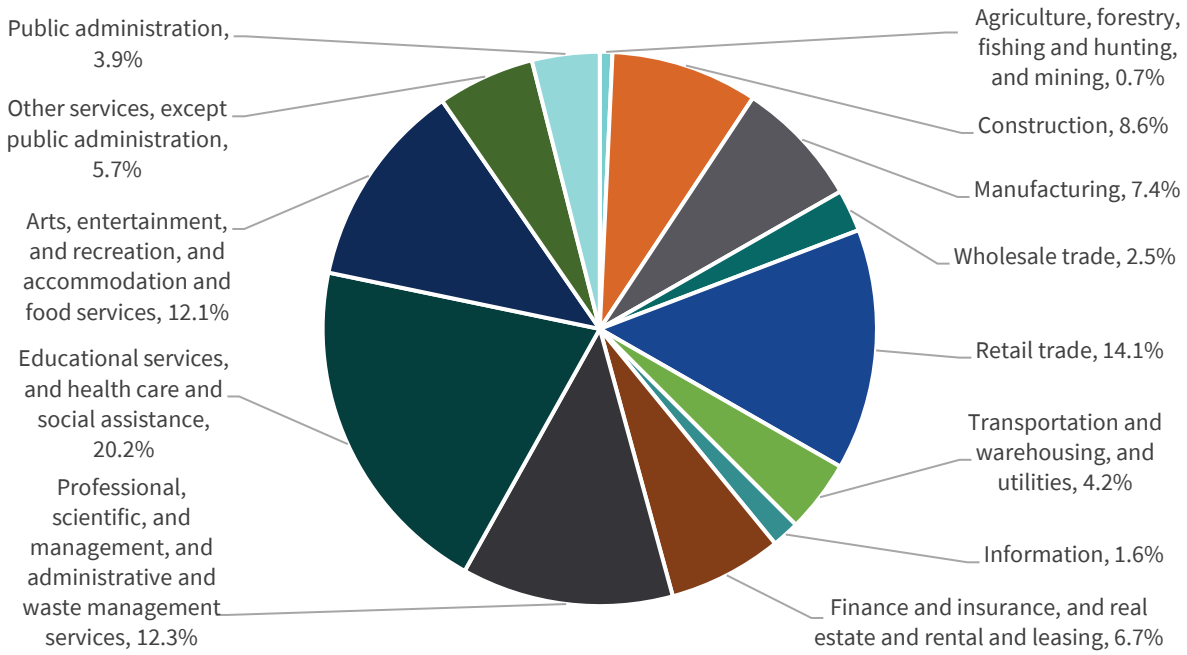
Map 2-8: Employment Density in 2033

Sources: MCAT, Manatee County Government, Sarasota/Manatee MPO

Employment by Industry

Figure 2-2 displays the percentage of county employment broken down by employment sector in Manatee County. The largest sectors include educational services, health care, and social assistance, which make up 20.2% of the county's employment, followed by retail trade at 14.1%. Together, these two sectors make up over a third of the jobs available in the county.

Figure 2-2: Percentage of Employment by Industry



Source: 2020 ACS 5-Year Estimates

Other Demographic Characteristics

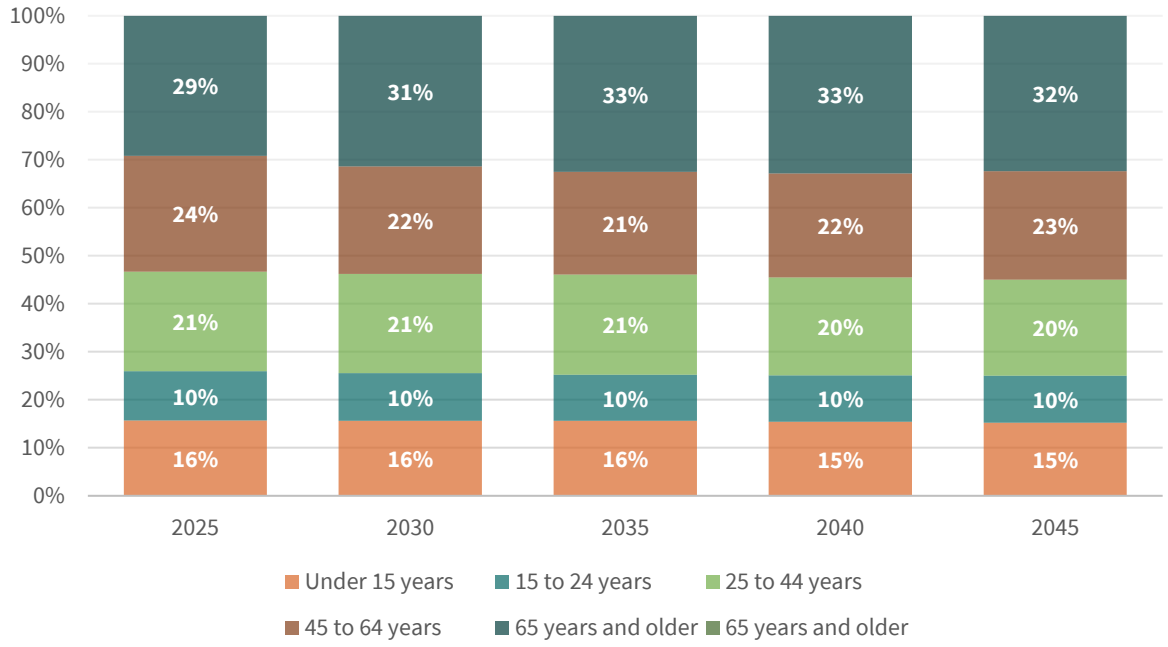
In addition to population and employment, the baseline conditions analysis also looked at key demographics such as age distribution, education attainment, income distribution, racial and ethnic origin, limited English proficiency, and foreign-born populations to better understand the community that MCAT serves.

Age Distribution

Figure 2-3 shows the age distribution of the population in Manatee County and the changes expected between 2025 and 2045. Not much change is expected for the population under age 40. Most of the observable change is expected to occur in the 65 years and older cohort, changing from 29% to 32% within that time period. Growth in this population cohort is an important consideration for MCAT since a person's ability to drive is reduced with age, leading to increasing demand for other transportation options such as paratransit.

The cohorts between ages 25 and 64 represent a combined 45% of Manatee County's residents, encompassing most working-age residents who may benefit from transit services. The projections show that the working-age cohorts will remain relatively stable over the next few decades.

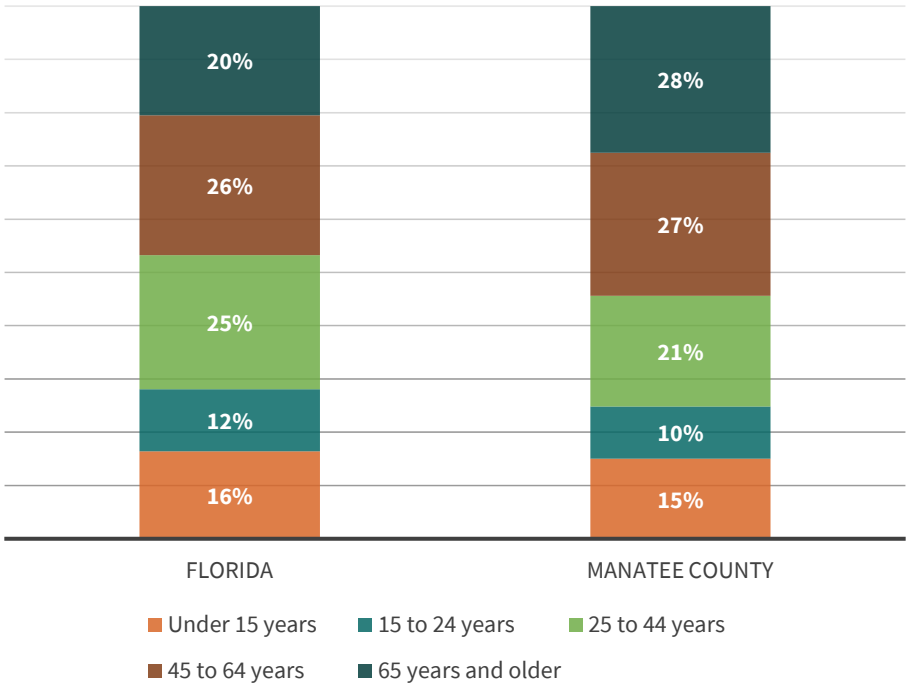
Figure 2-3: Projected Age Distribution



Source: 2024 BEBR Florida Statistical Abstract

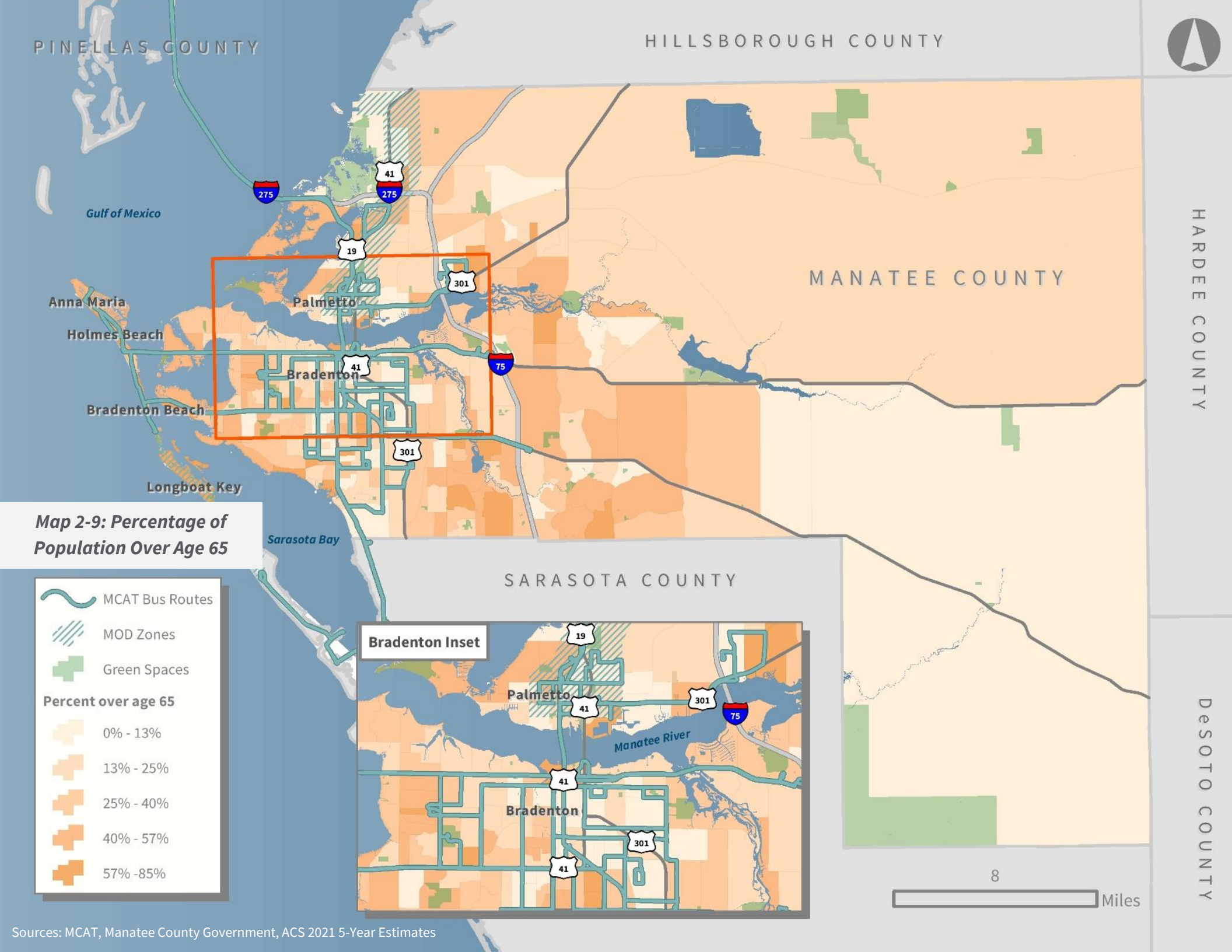
Figure 2-4 shows a comparison of the age distribution between Manatee County and Florida. Compared to Florida as a whole, Manatee County has a higher share of its population aged 65 years or older, at 28%. Additionally, the share of the working age population is about 5% lower in Manatee County compared to the rest of the state. According to the ACS, Manatee County's median age was 48.8 years of age in 2020, making it the twelfth oldest county in Florida.

Figure 2-4: Age Distribution in Florida and Manatee County in 2020



Source: 2020 ACS 5-Year Estimates

Map 2-9 shows the distribution of the population over age 65 across the county. Most of the county shows an even distribution of the population over age 65; however, areas with the most notable proportions include Longboat Key, central Palmetto, Bradenton, and the suburban areas surrounding the I-75 corridor.



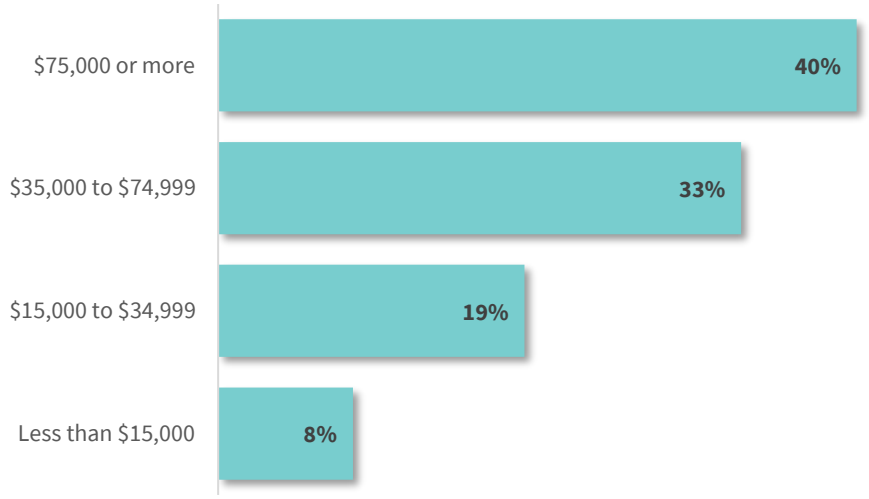
Map 2-9: Percentage of Population Over Age 65

Sources: MCAT, Manatee County Government, ACS 2021 5-Year Estimates

Income Distribution

Earned income is an important factor in determining public transit needs. Households with lower annual income are less likely to own a vehicle because of the high costs of ownership. Lack of vehicle ownership generates a higher propensity to use public transit and/or other mobility alternatives. Figure 2-5 shows the distribution of income in Manatee County.

Figure 2-5: Annual Household Income Distribution in Manatee County



Source: 2020 ACS 5-Year Estimates

Approximately 40% of households have an annual income of $75,000 or more in Manatee County, while 33% of households make between $35,000 and $75,000. Accounting for nearly three-quarters of the population, these income brackets are less inclined towards the regular use of public transit.

Poverty Level

Over a quarter of the population earns less than $35,000 annually. People in the cohorts below this threshold tend to use public transit more frequently than others, or generally benefit the most from access to public transit. It is important to note that poverty has declined in Manatee County over the last decade. ACS Estimates shown in Table 2-4 indicate a 3% decrease in poverty levels between 2010 and 2020 in Manatee County.

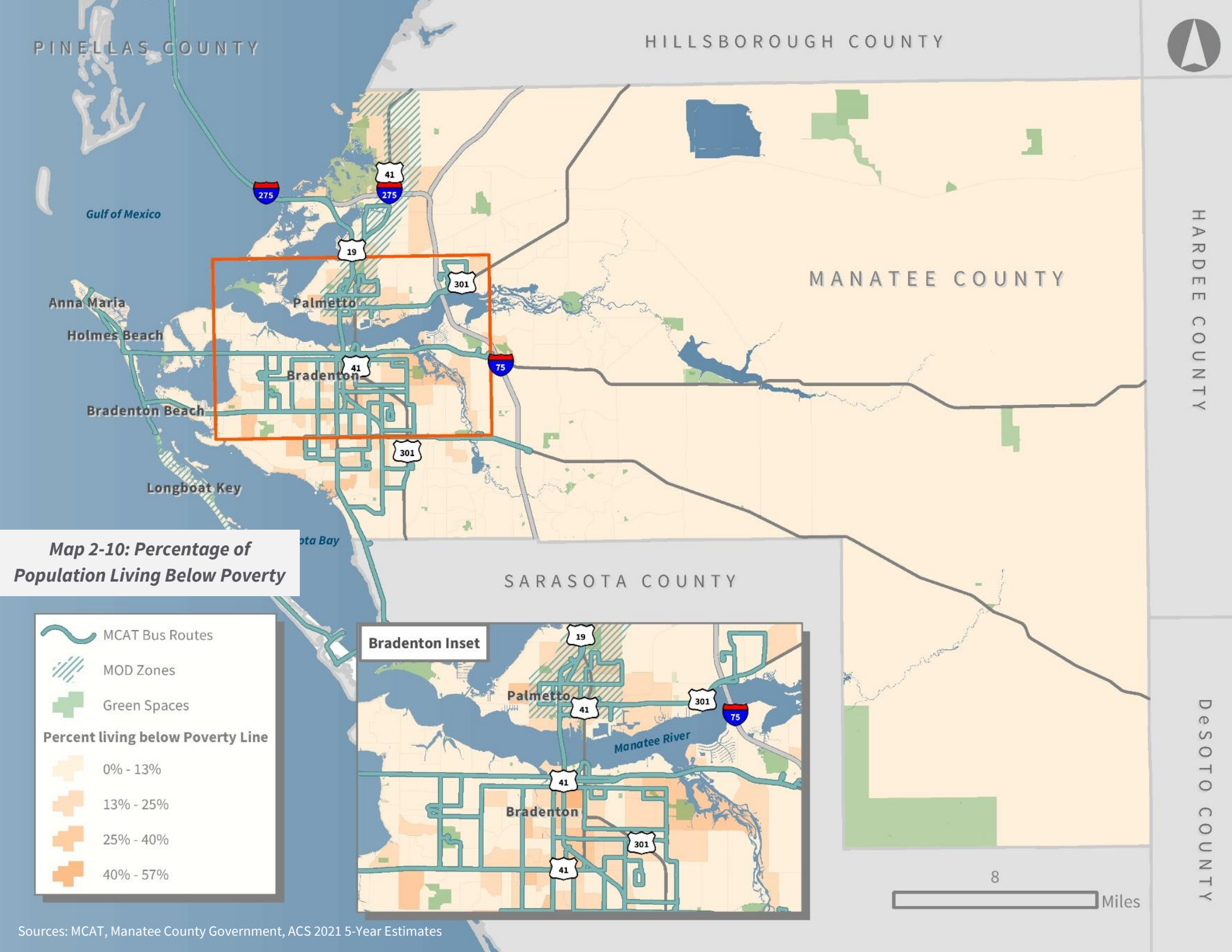
Table 2-4: Poverty Statistics

Below Poverty	Population in Poverty	% Population
2010	45,715	14.3%
2020	42,675	11.0%

Source: 2020 ACS 5-Year Estimates

While there may be an observable lower number in the people living in poverty, it remains critical to provide transit to households with low-income since individuals in these households generally have a higher propensity towards using public transit due to financial hardship and the challenge to own a vehicle. Map 2-10 shows the percent of the population in each block group living below the federal poverty line according to ACS 2020 estimates.

The US 41 corridor leading north toward Port Manatee shows a large concentration of households below the poverty line. However, many of the areas near downtown Bradenton and Palmetto generally show larger numbers than other parts of the county. The area between 27th Street East and the Braden River shows the highest concentration of population living below the poverty line in Manatee County.



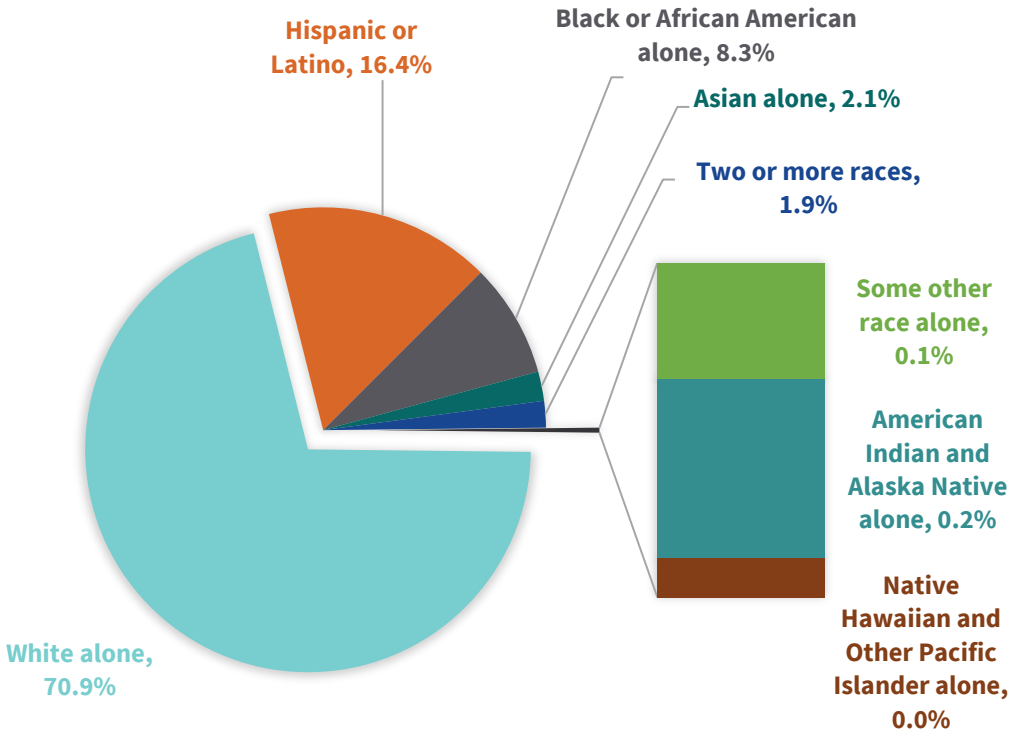
Map 2-10: Percentage of Population Living Below Poverty

Sources: MCAT, Manatee County Government, ACS 2021 5-Year Estimates

Minority Population

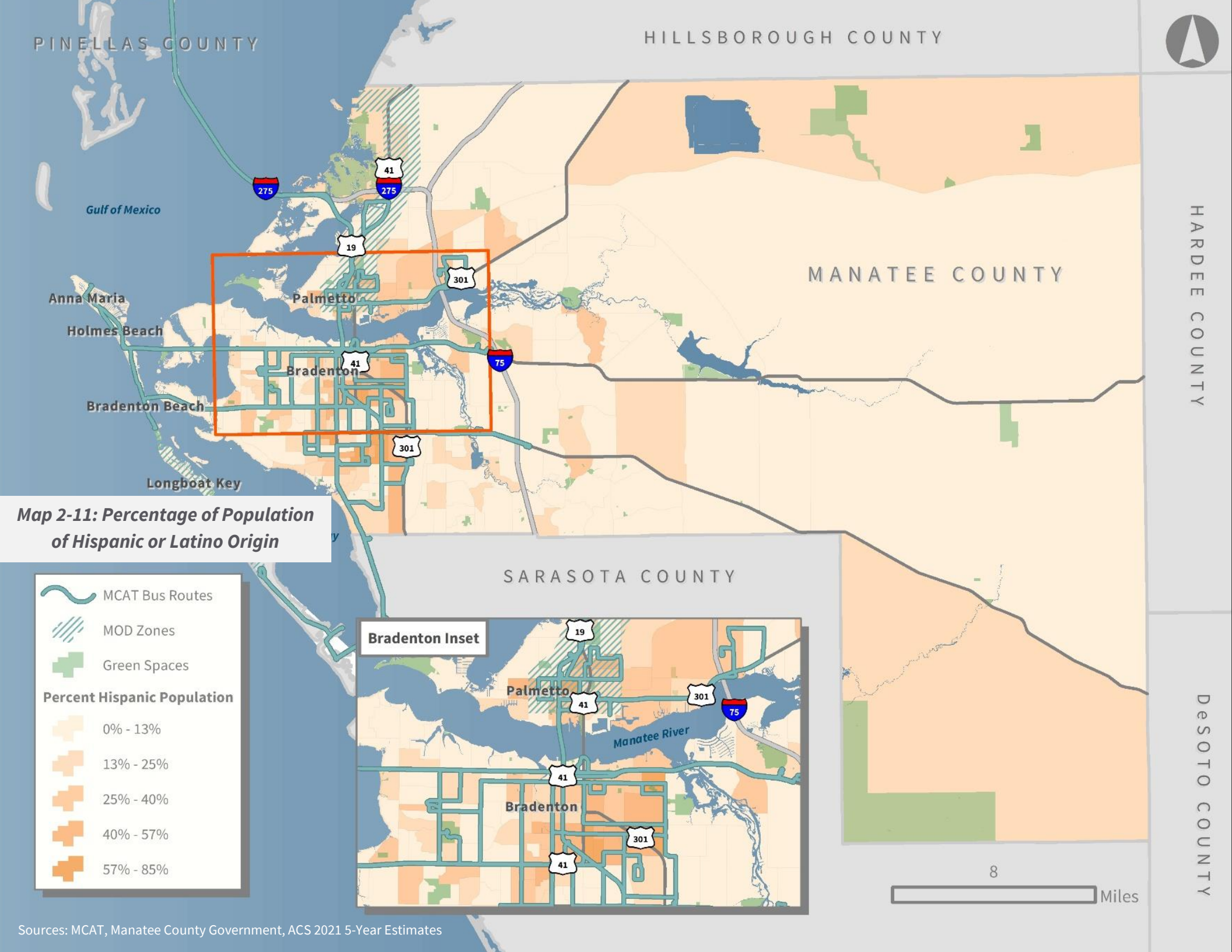
Figure 2-6 shows the distribution of the population by race and ethnicity in Manatee County. Currently, Manatee County has slightly less than 30% of residents that identify as a minority. The Hispanic or Latino community make up 16.4% of the population, making it the largest ethnic minority in the county, followed by the Black or African American community at 8.3%.

Figure 2-6: Population Distribution by Race and Ethnicity, 2020



Source: 2020 ACS 5-Year Estimates

Map 2-11 shows the percentage of the population that is of Hispanic or Latino origin by block group across the county, while Map 2-12 shows the percentage of the population per block group that identifies as a minority. Minority populations can be found along a north-to-south corridor generally within 2 miles on each side of US 41 or US 301, from Port Manatee to University Parkway, and in the communities within this corridor such as Oneco, Samoset, and West Samoset.



Map 2-11: Percentage of Population of Hispanic or Latino Origin

Sources: MCAT, Manatee County Government, ACS 2021 5-Year Estimates

Map 2-12: Percentage of Minority Population

Sources: MCAT, Manatee County Government, ACS 2021 5-Year Estimates

Limited English Proficiency Population

The Limited English Proficiency (LEP) population refers to the number of individuals who speak English less than "very well." Table 2-5 shows statistics associated with the LEP population present in Manatee County. The ACS data suggest that approximately 17% of households speak a language other than English, but only 2.7% of households are considered LEP. A majority of these LEP households speak Spanish.

Table 2-5: Manatee County LEP Population Statistics

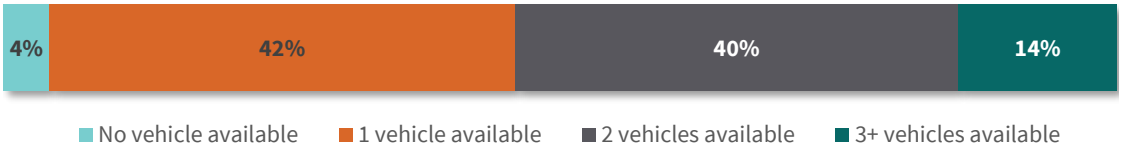
Language	Households that speak languages other than English		Households that are considered Limited English Proficient	
	Actual	**Percent**	**Actual**	**Percent**
Total Households	*150,345*			
Spanish	16,317	10.9%	2,534	1.7%
Other Indo-European languages	6,719	4.5%	1,070	0.7%
Asian and Pacific Island languages	2,216	1.5%	321	0.2%
Other languages	788	0.5%	115	0.07%
Total	**26,040**	**17.3%**	**4,040**	**2.7%**

Source: 2020 ACS 5-Year Estimates

Vehicle Ownership

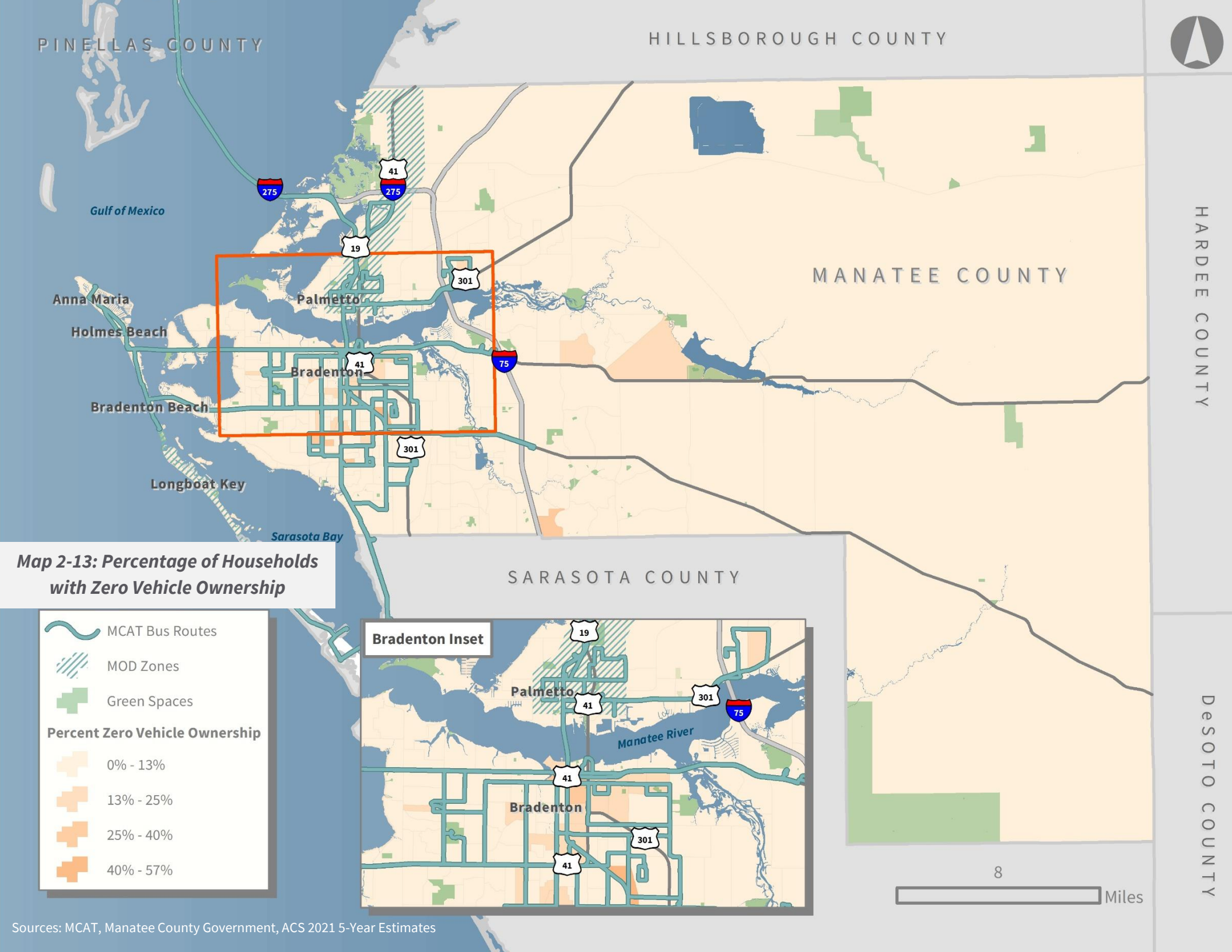
Vehicle ownership is a key indicator of a transit supportive market since a lack of vehicle ownership generates a high propensity towards the use of mobility alternatives, including public transit. Many reasons for the lack of vehicle ownership exist, most of which overlap with the general characteristics associated with those considered to be "transportation disadvantaged." For example, a low household income or lack of employment can create a challenge for individuals to acquire and maintain a vehicle because of its significant cost. Additionally, older adults may not be able to accommodate the physical challenge of operating a vehicle and, therefore, may not own one. Finally, there may exist a group of people who actively choose to not own or operate vehicles, even if they can do so financially and/or physically. Often this choice is generally associated with personal environmental concerns or with the desired preference to rely on alternative modes of transportation. Figure 2-7 shows that, at around 82%, a vast majority of households in Manatee County own between 1 to 2 vehicles. However, 4% of households do not own any vehicles.

Figure 2-7: Distribution of Households by Vehicle Ownership



Source: 2020 ACS 5-Year Estimates

The distribution of households without any vehicles can be observed in Map 2-13. Most of the block groups with sizeable amounts of such households are in central Bradenton. The area surrounding the State College of Florida campus also shows a sizeable proportion, although these may be potentially higher due to the number of college students living in this area. The area east of I-75, off the University Parkway exit, also shows a large concentration of households with zero vehicles. It should be noted that there is a retirement community in this area that may be contributing to the higher numbers.



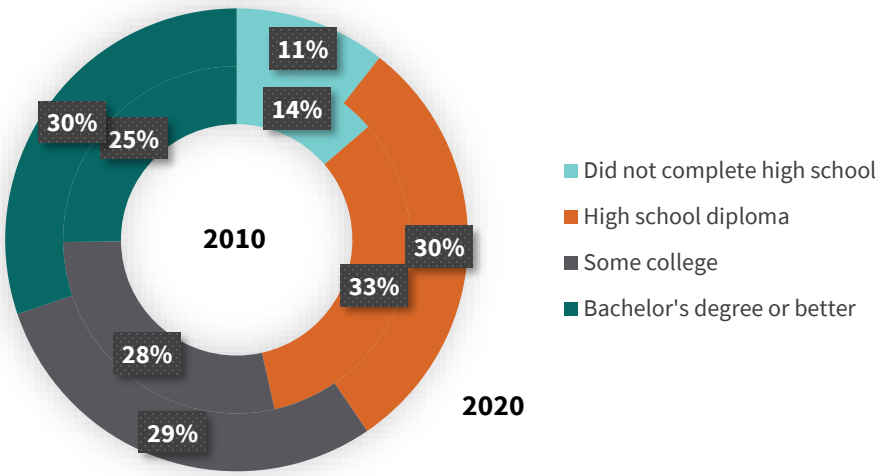
Map 2-13: Percentage of Households with Zero Vehicle Ownership

Sources: MCAT, Manatee County Government, ACS 2021 5-Year Estimates

Educational Attainment

Another key indicator of high transit dependency is educational attainment. Generally speaking, educational attainment levels are associated with various levels of income. Higher levels of educational attainment are associated with higher levels of income, while the inverse is associated with lower levels of income. Figure 2-8 shows that the number of residents that are reported as not having completed high school, or having at most a high school diploma, decreased by 6 percentage points combined between 2010 and 2020. On the other hand, the number of residents that are reported to have completed some college or that have a bachelor's degree and higher increased by 1 and 5 percentage points, respectively.

Figure 2-8: Distribution of Population by Educational Attainment

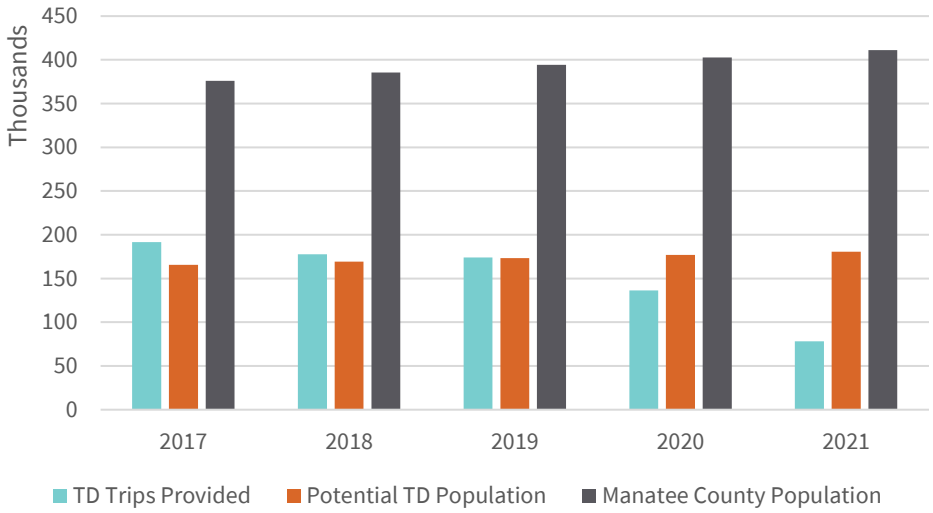


Source: 2020 ACS 5-Year Estimates

Transportation Disadvantaged Population

In addition to fixed-route bus service, MCAT also provides transportation services to the transportation disadvantaged (TD) population of Manatee County for veteran services, dialysis services, and subscription service trips. TD service is provided based on needs; medical and life-sustaining needs are given higher priority than business or recreation needs. Figure 2-9 shows the estimated TD population compared to the overall Manatee County population, in addition to the number of TD trips that were provided between 2017 and 2021.

Figure 2-9: Transportation Disadvantaged Statistics 2017-2021



Source: Florida Commission for the Transportation Disadvantaged, Annual Performance Reports (2017-2021)

A noticeable decrease in TD trips can be observed in every year between 2017 and 2021 even though a marginal increase in the potential TD population has occurred within the same period. Moreover, the proportion of potential TD population to the general population has generally remained stable over the years. Table 2-6 provides detailed numbers for the time period observed and the corresponding percent changes.

Table 2-6: Transportation Disadvantaged Service Statistics

	2017	2021	Percent Change (2017 - 2021)
TD Trips Provided	191,597	78,235	-59%
Potential TD Population	165,540	180,642	9%
Manatee County Population	375,888	411,219	9%

Source: Florida Commission for the Transportation Disadvantaged, Annual Performance Reports (2017-2021)

While a steady increase in the general population and the TD population continues to be observed at 9%, a decrease in the provision of TD trips of 59% can be observed during this period, as well. The more significant reduction in TD trips observed in 2020 and 2021 is most likely associated with the prevailing trend of US transit ridership losses resulting from the COVID-19 pandemic.

Transit Market Analysis

Two GIS-based analysis tools were utilized to expand the use of population and employment data, summarized previously. One tool illustrates the relationship between the discretionary market (i.e., persons living in higher-density areas of the region who can drive and have access to a vehicle, but may be a potential transit rider because of some willingness to use alternative modes

for travel) and the use of transit as a commuting alternative. The other measures the levels of transit dependency within a particular geographical area to help assess existing transit coverage in comparison to areas with population that may have a higher propensity for transit use.

The tools include a Density Threshold Assessment (DTA) to analyze the discretionary rider market and a Transit Orientation Index (TOI) to analyze traditional rider markets, such as older adults, youth, and low-income/no vehicle households, all of which have a higher propensity for transit use. The transit markets and the corresponding market assessment tool used to measure each are described below.

Discretionary Rider Markets

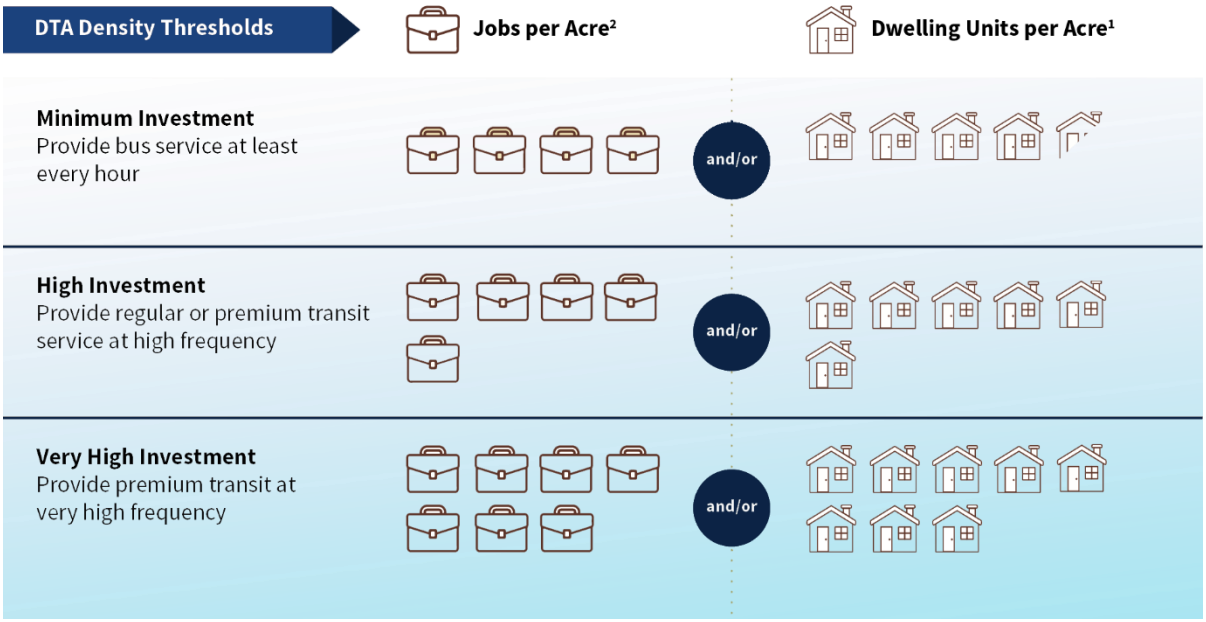
As noted, the discretionary market consists of potential riders residing or working in higher-density areas of Manatee County that may choose to use transit as a commuting or transportation alternative. The analysis was conducted using industry-standard density thresholds to identify the areas in Manatee County that exhibit transit-supportive residential and employee density levels today as well as in the future, such as those already discussed related to housing and employment densities. Socioeconomic data for Manatee County, including dwelling unit and employment data, were used to develop the DTA for 2022.

Three density thresholds, developed based on industry standards/research, were used to indicate whether an area contains sufficient density to sustain some level of fixed-route transit operations:

- Minimum Investment – reflects minimum dwelling unit or employment densities to consider basic fixed-route transit services (i.e., local fixed-route bus service).
- High Investment – reflects increased dwelling unit or employment densities that may be able to support higher levels of transit investment (i.e., more frequent service, longer service span, etc.) than areas meeting only the minimum density threshold.
- Very High Investment – reflects very high dwelling unit or employment densities that may be able to support more significant levels of transit investment (i.e., very frequent services, later service hours, weekend service, etc.) than areas meeting the minimum or high-density thresholds.

Figure 2-10 presents the dwelling unit and employment density thresholds (in terms of TAZs) associated with each threshold of transit investment.

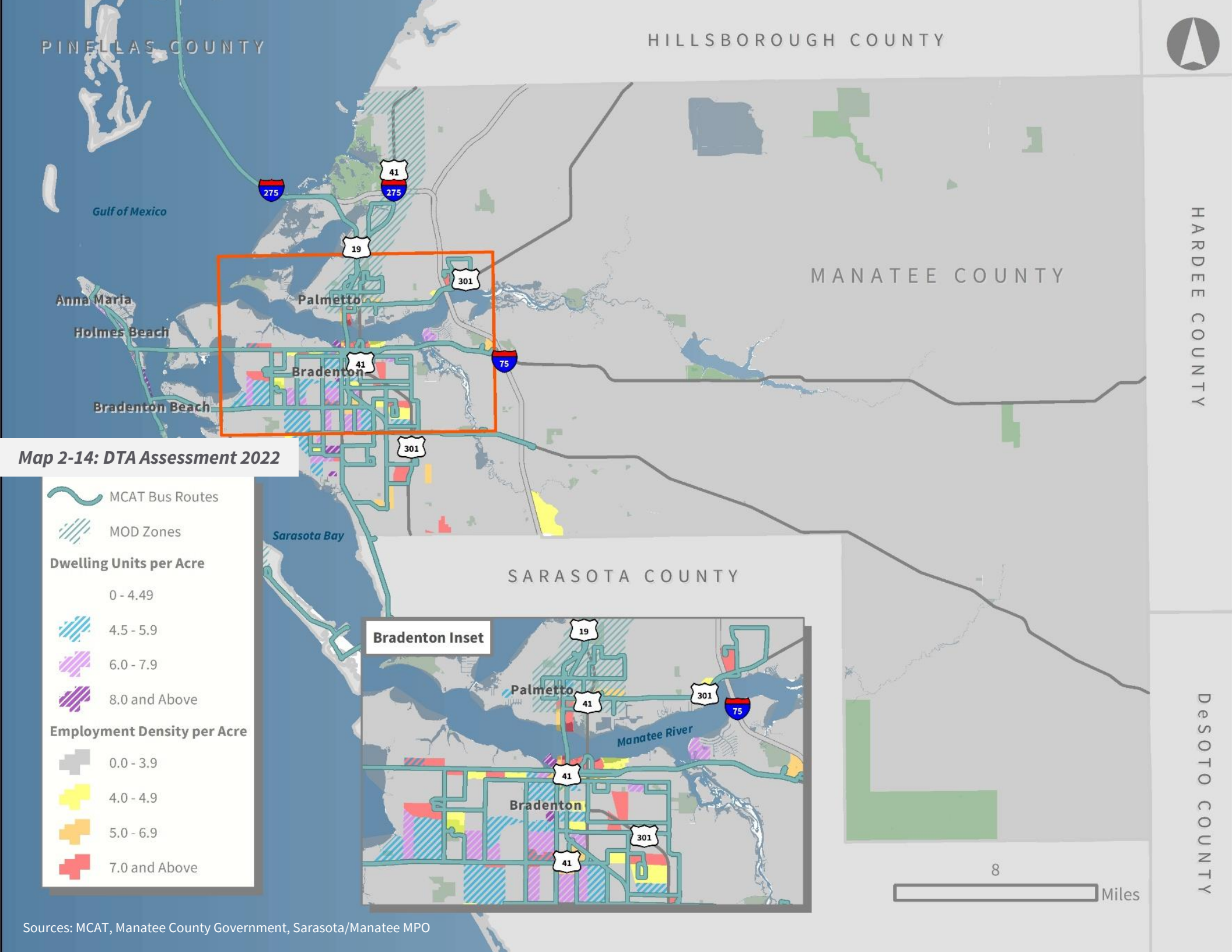
Figure 2-10: Density Threshold Assessment Parameters



[1] *TRB, National Research Council, TCRP Report 16, Volume 1 (1996), "Transit and Land Use Form," November 2002, MTC Resolution 3434 TOD Policy for Regional Transit Expansion Projects.*
[2] *Based on review of research on relationship between transit technology and employment densities.*

As density increases, areas generally become more transit-supportive; the DTA assists in determining the presence of optimal conditions for varying levels of fixed-route transit service. The results of these analyses also will be critical for subsequent use in the assessment of transit needs and demand.

Map 2-14 illustrates the results of the 2022 DTA analyses conducted for Manatee County. This map also includes an overlay of the existing MCAT route network to gauge how well the current transit network covers the areas of Manatee County that are considered supportive of at least a minimum level of transit investment.



Map 2-14: DTA Assessment 2022

Sources: MCAT, Manatee County Government, Sarasota/Manatee MPO

DTA Results Summary

The 2022 DTA analysis indicates that the discretionary transit markets are derived mainly from employment densities rather than from dwelling unit densities and can be summarized as follows:

- The downtown Bradenton area shows high levels of employment density as well as dwelling units.
- High levels of employment and dwelling unit density can be observed along various corridors; from east to west along Manatee Avenue and Cortez Road, and from north to south along Tamiami Trail (US 41).
- High levels of employment density can also be observed between Bradenton Beach and Holmes Beach.
- MCAT bus routes show a satisfactory level of transit accessibility to most of these high-density areas.

Traditional Rider Markets

A traditional rider market refers to population segments that historically have had a higher propensity to use transit or are dependent on public transit for their transportation needs. Traditional transit users include older adults, youth, and individuals living in households that are low-income and/or have zero vehicles available for use (Table 2-7). For some individuals, the ability to drive is greatly diminished with age, so they must rely on others for their transportation needs. Likewise, younger persons not yet of driving age but who need to travel to school, to employment, or for leisure may rely more on public transportation until they reach driving age. For lower-income households, transportation costs are particularly burdensome since they tend to spend a greater portion of income on transportation-related expenses than higher-income households do. The Economic Policy Institute suggests that in 2022, the cost of transportation in a Manatee County household of two adults and two children is about $1,200, accounting for 17% of the total estimated cost of living, a value that is slightly above the average among Florida counties.

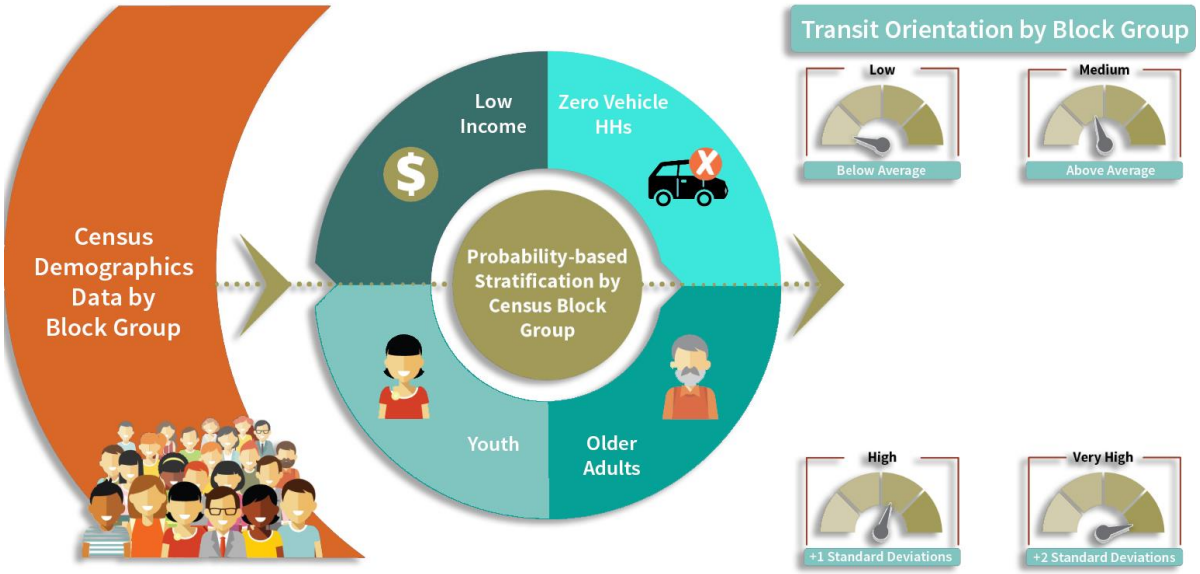
Table 2-7: Transit Orientation Index Variables

TOI Variable	Units
Population Age 14 and Under	Youth residents
Low-Income Population	$25,000 or less annual income for 4-person household
Households with Zero Vehicles	Zero-vehicle households
Population Age 65 and Over	Older adults

Source: Benesch

The TOI was developed to assist in identifying areas of the county where higher concentrations of these traditional rider markets exist. To create the TOI for this analysis, demographic data from the 2021 ACS 5-Year Estimates were analyzed at the block group level. Using data for these characteristics and developing a composite ranking for each census block group, each area was ranked as “Very High,” “High,” “Medium,” or “Low” in their respective levels of transit orientation. The methodology and benchmarks are shown in Figure 2-11.

Figure 2-11: Transit Orientation Index Methodology

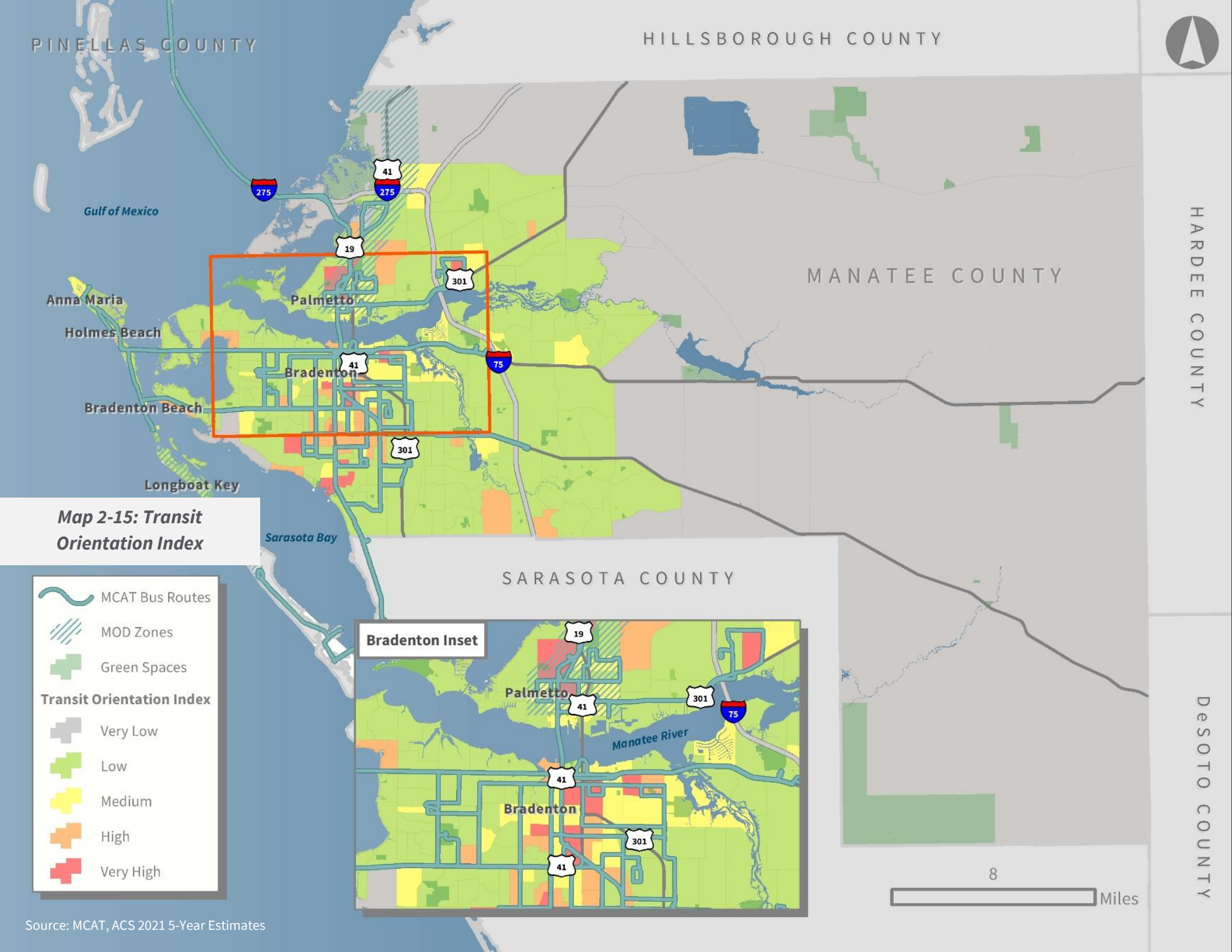


Source: Benesch

Map 2-15 illustrates the TOI, reflecting areas throughout the county with varying traditional market potential. The existing transit route network shows how well MCAT covers those areas.

TOI Results Summary

- The majority of areas that exhibit "high" or "very high" orientation toward transit are concentrated in the Memphis community on the northern side of Palmetto, areas surrounding the Samoset community, and the Oneco community south of downtown.
- Areas exhibiting a "very high" orientation toward transit are found in concentration in the central region of Bradenton, along Cortez Road, and the areas surrounding Blake Hospital.



Map 2-15: Transit Orientation Index

Source: MCAT, ACS 2021 5-Year Estimates

Commute Characteristics

Data from the 2010 and 2020 ACS, displayed in Table 2-8, show the commuter characteristics for the part of Manatee County's population in the labor force that are age 16 years and older. The estimates show that less than 1% of the labor force uses public transit as their main mode of transportation, with a marginal decrease between 2010 and 2020. Over 76% of the population is estimated to drive alone to work in 2020, which is a slight decrease from a little over 80% in 2010. A 4% increase in the work at home trend is observed between 2010 and 2020, a figure that has been exacerbated by pandemic trends.

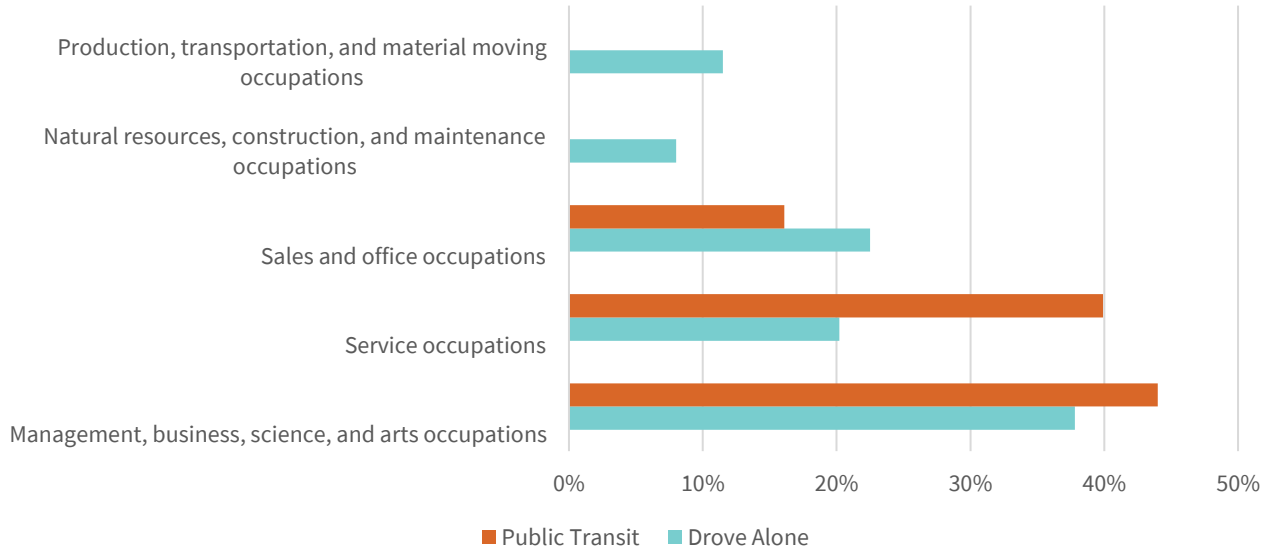
Table 2-8: Commute Characteristics

Commute Choice	2010	2020
Workers 16 years and older	132,191	162,696
Drove Alone	80.8%	76.6%
Carpooled	9.7%	11.0%
Public Transportation (excluding taxicab)	0.8%	0.5%
Walked	1.3%	1.0%
Worked at home	4.9%	8.9%
Other	2.3%	2.1%

Source: ACS 2010 and 2020 5-Year Estimates

Figure 2-12 shows the occupation of people in the labor force by mode choice.

Figure 2-12 Occupation by Mode Choice



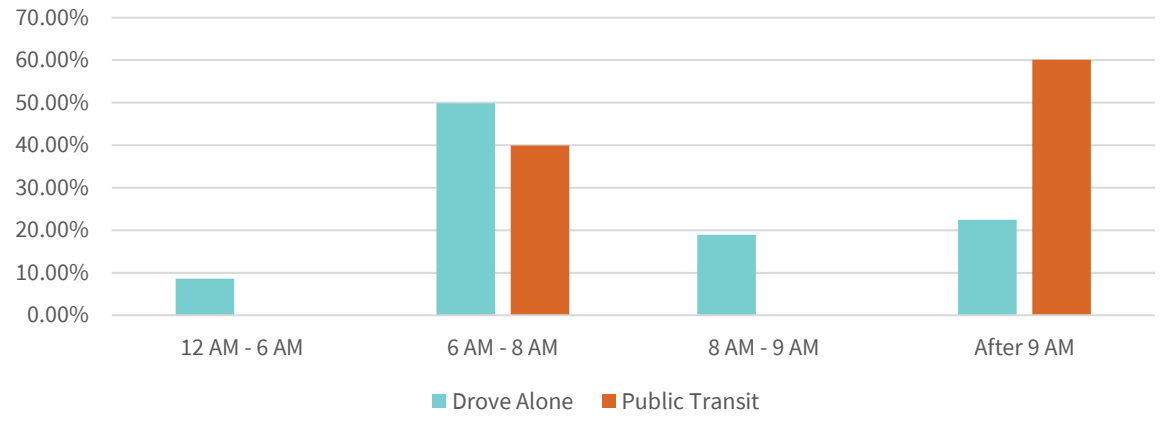
Source: ACS 2020 5-Year Estimates

Most people using public transit work in sales and services as well as other forms of business. People working in occupations such as production, construction and the management of natural

resources rarely make use of transit, most likely due to the distance of these services from public transit service zones.

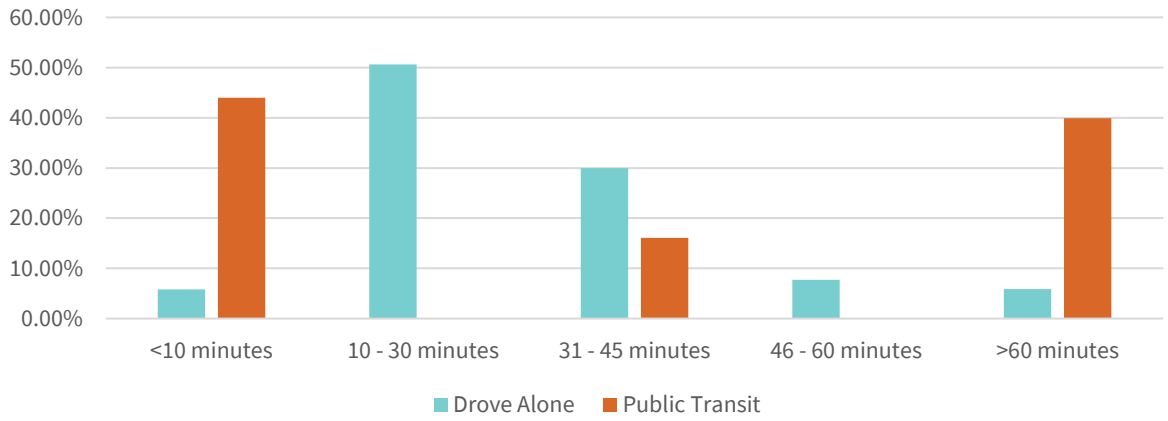
Figures 2-13 and 2-14 compare temporal statistics associated with each commuter's mode choices. Many commuters depart for work between 6 AM and 9 AM for both drive-alone and public transit commuter types. However, many transit users leave for work after 9 AM and throughout the day. This could be an indicator that public transit is useful for workers who work odd shifts, often associated with the service industry. Most drive-alone commuters experience travel times that range between 10 and 45 minutes. Public transit users often have either really long or relatively short commutes, with travel times split around 40% for trips that last less than 10 minutes or over 60 minutes.

Figure 2-13: Departure Time for Work



Source: ACS 2020 5-Year Estimates

Figure 2-14: Travel Time to Work



Source: ACS 2020 5-Year Estimates

Commuter Inflows and Outflows

To assess regional trends and patterns of commuters, an analysis using the 2019 Longitudinal Employer Household Dynamics (LEHD) and Longitudinal Origin-Destination Employment Statistics (LODES) data ("On the Map," U.S. Census Bureau) was completed. Tables 2-9 and 2-10 show commuter flow data provided through LEHD. This analysis evaluates geographic commuting patterns of workers by the location of their employment and residential area.

Table 2-9: 2019 Manatee County Commuter Inflow

County of Origin	Count	Share
Manatee County, FL	*67,878*	*52.9%*
Sarasota County, FL	16,003	12.5%
Hillsborough County, FL	10,673	8.3%
Pinellas County, FL	6,003	4.7%
Lee County, FL	3,517	2.7%
Polk County, FL	2,314	1.8%
Orange County, FL	2,115	1.6%
Pasco County, FL	1,856	1.4%
Collier County, FL	1,621	1.3%
Broward County, FL	1,432	1.1%
All Other Locations	14,783	11.5%
Total Inflow*	**60,317**	

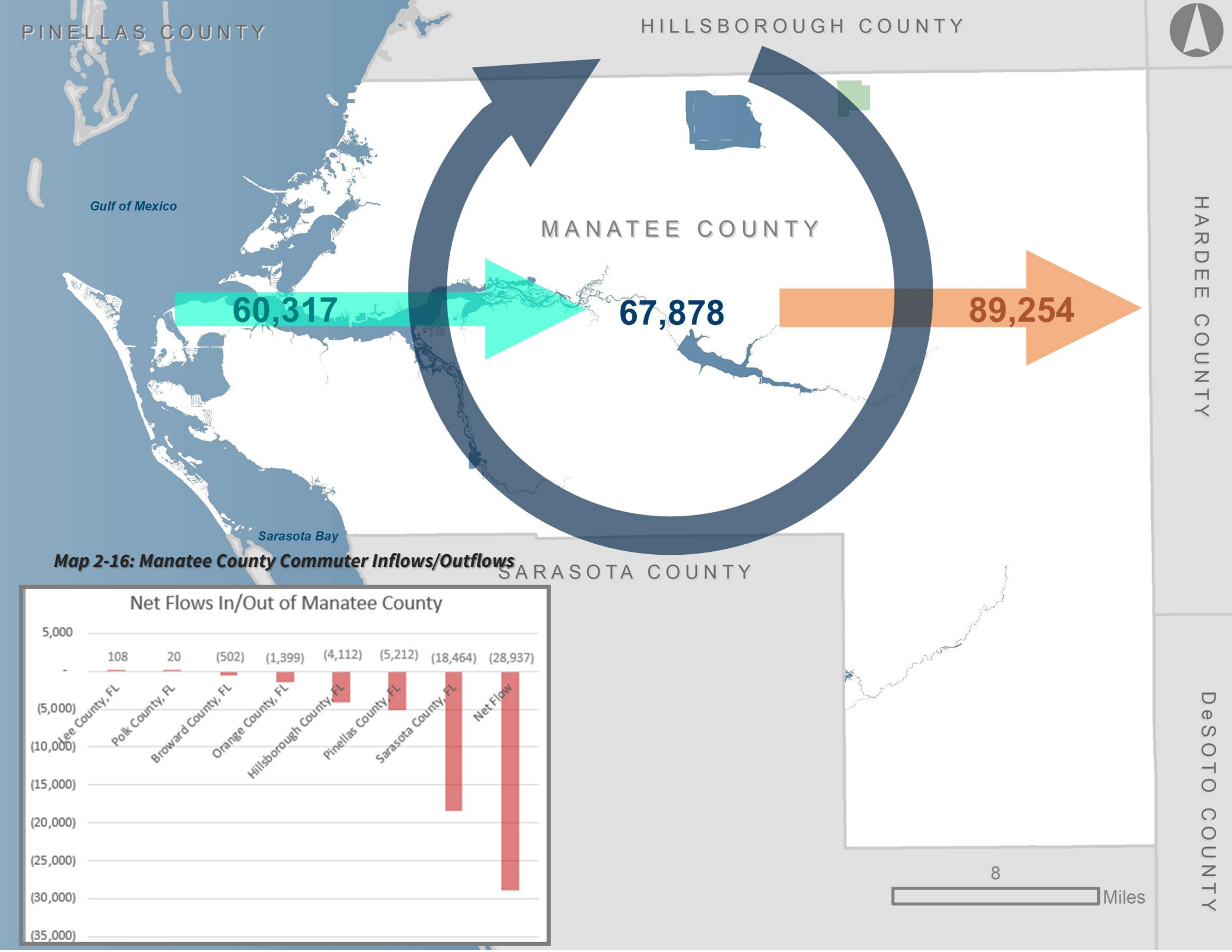
*Total does not include Manatee-to-Manatee trips.
Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2019)

Table 2-10: 2019 Manatee County Commuter Outflow

County of Destination	Count	Share
Manatee County, FL	*67,878*	*43.2%*
Sarasota County, FL	34,467	21.9%
Hillsborough County, FL	14,785	9.4%
Pinellas County, FL	11,215	7.1%
Orange County, FL	3,514	2.2%
Lee County, FL	3,409	2.2%
Polk County, FL	2,294	1.5%
Miami-Dade County, FL	2,027	1.3%
Broward County, FL	1,934	1.2%
Palm Beach County, FL	1,791	1.1%
All Other Locations	13,818	8.8%
Total Outflow*	**89,254**	

*Total does not include Manatee-to-Manatee trips.
Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2019)

Nearly 68,000 people both live and work within Manatee County. In total, 60,317 workers commute into Manatee County from other parts of Florida, while 89,254 commute outward from Manatee County. Sarasota, Hillsborough, and Pinellas are the top three counties for both commuter inflow and outflow generators for Manatee County, all three of which are neighboring counties. Notable outflow generators include Orange County at 3,514 commuters and Miami-Dade County at 2,027 commuters. An inflow of 2,115 commuters comes from Orange County and 1,432 commuters from Broward County. Map 2-16 illustrates the commuter inflow and outflow in relation to Manatee County. The map also indicates the net flows in and out of Manatee County. In general, there is a larger outflow from Manatee County compared to the inflow of commuters.



Map 2-16: Manatee County Commuter Inflows/Outflows

Table 2-11 below shows the commute characteristics of people commuting in and out of Manatee County. According to the ACS, a majority of workers living in Manatee County drive alone to work, around 12% of workers carpool to work, and only 0.5% use public transit.

Table 2-11: Commute Characteristics of Inflow and Outflow Commuters

Place of Work	Total	Drove Alone	Carpooled	Public Transit *
Workers 16 years and over who did not work from home	148,294	124,630	17,920	798
Worked in county of residence	70.00%	66.20%	70.20%	81.10%
Worked outside county of residence	28.50%	32.40%	28.80%	13.40%

Source: ACS 2020 5-Year Estimates
*Does not include taxicab

Major Employers

A variety of public and private sector entities are among the major employers in Manatee County and, while some of the county offices are located in downtown Bradenton, many of the employer locations are spread throughout Manatee County. The largest private sector employer is the Manatee County School Board with 5,634 employees. The largest private sector employer is Bealls, Inc., with 1,996 employees. The company was established in Manatee County and its headquarters remains in the area. Table 2-12 shows a list of the top five public-sector employers and the top 25 private-sector employers in the area.

Table 2-12: Top Public and Private Employers in Manatee County

Company	Employees
Public Sector	
Manatee County School Board	5,634
Manatee County Board of County Commissioners	1,922
Manatee County Sheriff's Office	1,219
State College of Florida, Manatee-Sarasota	889
City of Bradenton	645
Private Sector	
Bealls, Inc.	1,996
Tropicana Products	900
IMG Academy	787
Sun Hydraulics	680
TriNet	610
Pierce Manufacturing, Inc.	530
Sysco West Coast Florida, Inc.	468
Gettel Automotive Group	344
Air Products & Chemicals, Inc.	303
Chris-Craft	280
Star2Star Communications	258

Source: Bradenton Area Economic Development Corporation

Table 2-12: Top Public and Private Employers in Manatee County (continued)

Company	Employees
Design Concepts/Marine Concepts	254
Feld Entertainment, Inc.	219
Tropitone Furniture Co., Inc.	210
Flowers Baking Company of Bradenton, LLC	207
Team Edition Apparel	200
UTC Fire & Security Americas Corporation, Inc.	200
Hoveround Corporation	200
SAFRAN Power USA, LLC	198
Yellowfin Yachts	194
Dental Care Alliance	192
Dentsply Sirona Orthodontics, Inc.	168
It Works!	168
SUNZ Holdings	164
Trident Building Systems, Inc.	150

Source: Bradenton Area Economic Development Corporation

Major Trip Generators

Various locations across Manatee County are considered to be major trip generators due to their capacity to attract large numbers of trips to their locations. These are locations that residents often frequent because they are places where employment, recreation, or shopping are concentrated.

Within Manatee County, the beaches of Anna Maria Island, Holmes Beach, Bradenton Beach, and Longboat Key attract thousands of visitors annually and are a significant economic generator for the tourism sector in Manatee County. Access to these beaches from the mainland is via two roadways: Manatee Avenue and Cortez Road. Both roads are served by MCAT bus routes and the beaches are served by the Anna Maria Island Trolley along the length of SR 789. Moreover, Longboat Key is served by a Mobility-on-Demand service, providing the beaches with relatively complete transit coverage and connectivity.

The Bradenton Area Convention Center and the nearby Fairgrounds are located close to downtown Palmetto and attract numerous visitors and businesses that wish to expose their services to the local community. LECOM Park is the Pittsburgh Pirates spring training facility, and it attracts many baseball fans during the months of March and April.

East of I-75, the opening and expansion of master planned communities such as Lakewood Ranch are driving up larger numbers of residents and bringing in more commercial opportunities to the area. Surrounded by golf courses and retail areas, these communities attract large numbers of trips to the area.

The presence of higher education institutions also attracts large numbers of people to Manatee County, including the State College of Florida, Manatee Technical College, and the University of South Florida's Sarasota-Manatee Campus. A few medical institutions also generate many health-related trips in the area including Manatee Memorial Hospital, Blake Medical Center, Lakewood Ranch Medical Center, and Manatee Glens Hospital.

Many visitors to Manatee County make use of the Sarasota-Bradenton International Airport, which sits on the county line between Manatee and Sarasota counties. Finally, a few local retailers, commercial centers, and industrial sites are known to generate many trips locally:

- DeSoto Mall
- Ellenton Premium Outlets
- Ellenton Ice and Sports Complex
- Whitfield Industrial Park
- Sanders Industrial Park
- Tropicana Processing Center
- University Town Center Mall

Identifying the various trip generators in the area is important since these create an impact on the transportation system. Moreover, understanding the trip generation rates and temporal characteristics of each major trip generator can help identify a steady supply of service to meet transit demands, or to provide service as a means to alleviate the large share of private vehicle trips.

Roadway Conditions

Manatee County has an extensive roadway network in the Bradenton area. Much of this network is affected by peak-hour congestion, especially during the peak of the tourism season. As the population continues to grow, and as areas continue to develop near the interstate, congestion has progressively increased; the provision of public transit in strategic corridors can help alleviate traffic congestion. The 2045 LRTP indicates in its mobility and reliability segment that congestion management is key, especially when growth is expected. Figure 1-1 displayed the projected growth increase according to BEBR projections. To account for this anticipated growth and the strain it may cause on the roadway network, the LRTP assessed the Level of Travel Time Reliability (LOTTR), a measurement of the consistency or dependability in travel times as measured from day to day or across different times of day. Transit can play a critical role in improving mobility when roadway conditions become severe. As opposed to addressing strained roadways through the expansion of roads, transit can provide an alternative that mobilizes more while reducing traffic.

The LRTP has identified 10 of the most unreliable intersections and road segments in Manatee and Sarasota counties. Unreliability accounts for the average speed and delay of vehicles across the road network. Six of the intersections are found in Manatee County and are listed in Table 2-13.

Table 2-13: Least Reliable Intersections in Manatee County

	Intersection
1	Sixth Avenue West at 14th Street West (Tamiami Trail)
2	Manatee Avenue at South Tamiami Trail (US 41)
3	Manatee Avenue East at 15th Street East
4	Cortez Road West at Gulf Drive North
5	Sixth Avenue West at Ninth Street West
6	SR 70 at Wauchula Road/Singletary Road

Source: 2045 Sarasota and Manatee County MPO, 2045 Long Range Transportation Plan

Most of the intersections are in Bradenton, one intersection is located in Bradenton Beach, and one intersection is located in the eastern part of Manatee County in Myakka City.

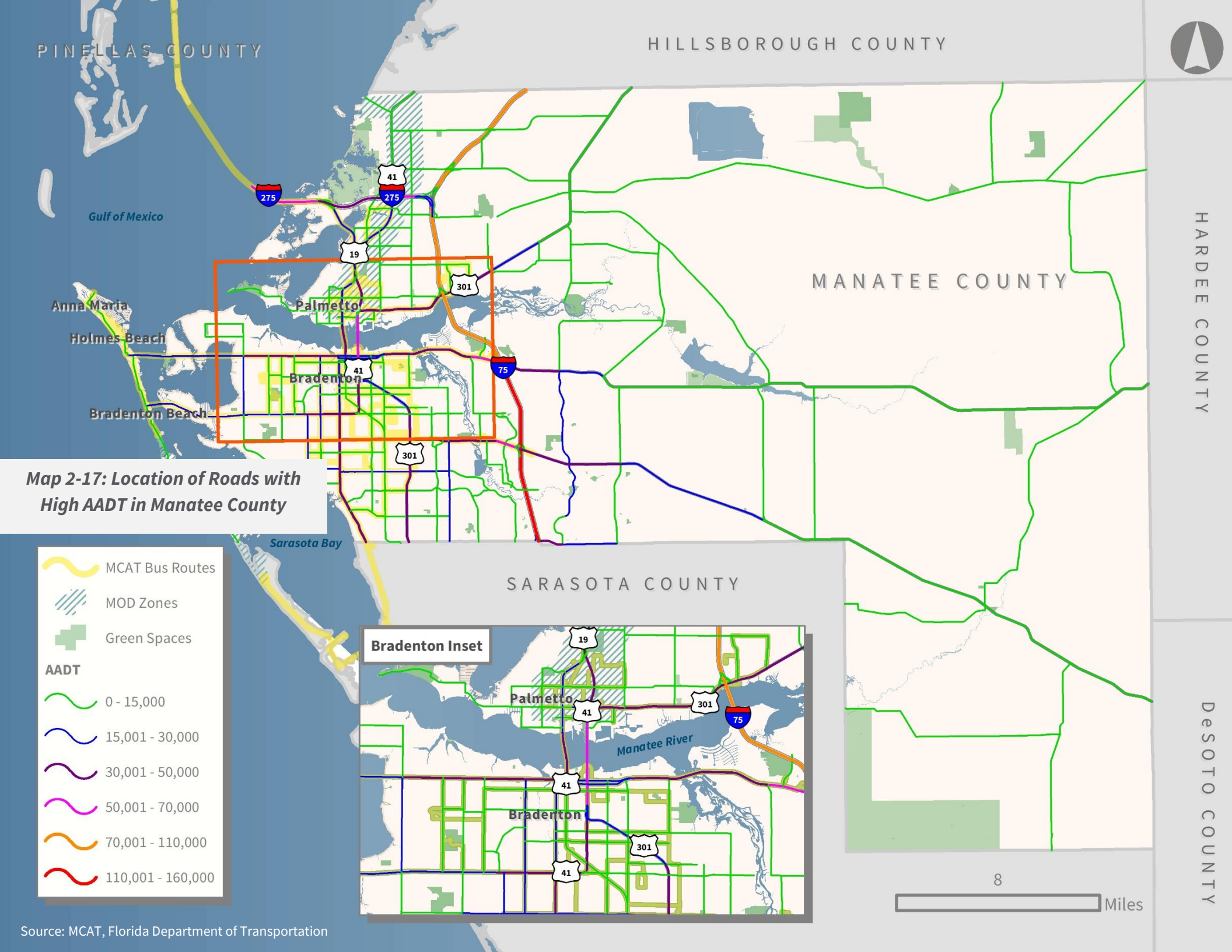
Table 2-14 shows a list of the most unreliable roadway segments during the afternoon peak period in Manatee County. Several of these segments lack transit services.

Table 2-14: Least Reliable Road Segments in Manatee County

	Roadway Segment	From	To	LOTTR	Transit on Segment
2	1st Street	26th Avenue East	SR 64/Manatee Avenue	1.74	Yes
3	9th Street West	6th Avenue West	301 Blvd. West	1.69	Yes
4	US 301	63rd Avenue East	SR 70/53rd Avenue	1.67	No
5	US 301 (Tamiami Trail North)	10th Street East	SR 64/Manatee Avenue	1.62	No
6	8th Avenue West	Green Bridge North	10th Street West	1.60	No
7	9th Street West	SR 64/Manatee Avenue	Green Bridge South	1.57	Yes

Source: 2045 Sarasota and Manatee County MPO, 2045 Long Range Transportation Plan

Another measure for roadway conditions is the Average Annual Daily Traffic (AADT), which indicates the average count of vehicles on a particular road segment on a daily basis. While the measurement only provides a count of vehicles on road segments, the numbers can indicate which corridors draw the most traffic volume on a daily basis in Manatee County. Map 2-17 shows which roads have the highest AADT in the county.



Map 2-17: Location of Roads with High AADT in Manatee County

Source: MCAT, Florida Department of Transportation

Several roads in Bradenton carry volumes upwards of 30,000 vehicles per day. Tamiami Trail in the segment between Palmetto and Bradenton is relatively busy and indicates a high level of traffic demand that may continue growing. The entire stretch of Manatee Avenue is also observed to carry over 30,000 vehicles, as well as Cortez Road and SR 70 between I-75 and 34th Street West. Currently, MCAT transit service covers most of the high traffic volume corridors in Manatee County. Further evaluations could investigate how public transit is serving roads with low Level of Service measures, which would evaluate service along underperforming road segments when accounting for both traffic volume and roadway capacity.

Tourist and Visitor Levels

Manatee County has a variety of attractions and accommodations for vacationers and conference attendees. The Bradenton Area Convention and Visitors Bureau publishes an annual Visitor Profile that includes key tourism volume and expenditure statistics used by local chambers of commerce and area businesses. Table 2-15 shows a summary of tourism-related statistics from the Visitor Profile. According to the July 2022 Visitor Profile, 910,000 tourists visited the Bradenton area between October 2021 and July 2022, generating a total economic impact of $1.43 billion. An 11.7% increase in visitors has been observed between 2021 and 2022, for a total increase in economic impact of 24.3%, indicating a steady resurgence in the tourism sector in Manatee County as the COVID pandemic and its impacts on tourism slowly recede.

Table 2-15: Manatee County Tourism Statistics

	FYTD 2021	FYTD 2022	% Change 21-22
Visitors	815,000	910,000	11.7%
Total Economic Impact	$1,150,826,700	$1,430,416,500	24.3%

Source: Bradenton Area Convention and Visitor's Bureau, Visitor Profile (July 2022)

As the pandemic recedes and tourism levels slowly return to pre-pandemic rates, the supply of seasonal transit such as the beach trolleys can be expected to be in higher demand.

Table 2-16 provides a summary of the markets that have been attracted by the tourism sector in Manatee County, measured in the number of visitors that stayed in commercial lodging by their region of origin. Most visitors to the Bradenton area were from other parts of Florida with about 58,443 visitors in July 2022, which is down from 71,300 in July 2021. The change in visitors between July 2021 and 2022 is most notable in visitors from the Northeast and the Midwest, who account for a 7% and 2.7% increase, respectively. Moreover, visitors from Canada and Europe have returned in that time period as a result of decreasing COVID travel restrictions from those regions. The numbers of visitors from those regions were too small to record in 2021.

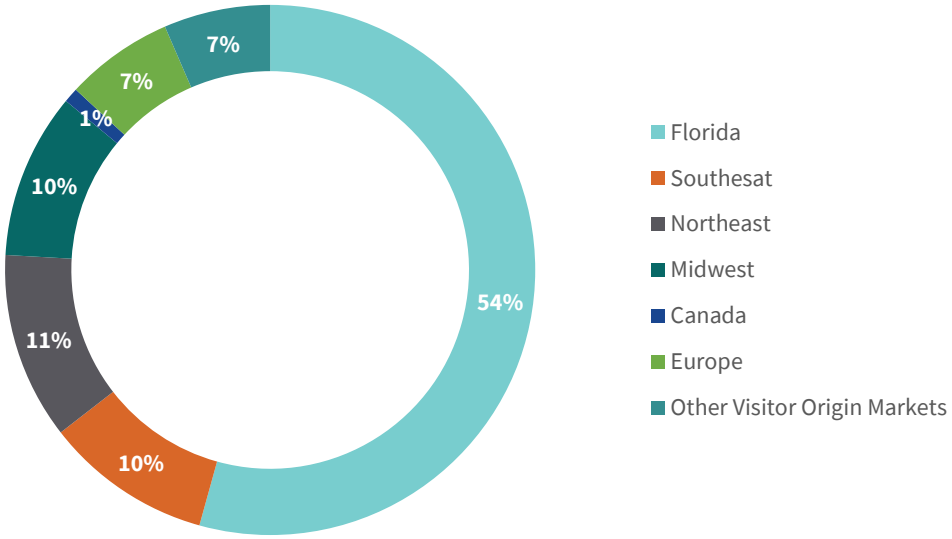
Table 2-16: Manatee County Visitor Origin Statistics

Visitor Origin Markets	July 2021	July 2022	% Change
Florida	71,300	58,430	-18.1%
Southeast	11,030	10,970	-0.5%
Northeast	11,470	12,270	7.0%
Midwest	10,580	10,870	2.7%
Canada	N/A	970	N/A
Europe	N/A	7,100	N/A
Other Visitor Origin Markets	7,020	6,990	-0.4%
Total	**111,400**	**107,600**	**-3.4%**

Source: Bradenton Area Convention and Visitor's Bureau, Visitor Profile (July 2022)

Figure 2-15 presents the percentage of visitors by their region of origin. In July 2022, visitors from other parts of Florida accounted for 54% of all visitors to Manatee County.

Figure 2-15: Percentage of Distribution of Visitors by Origin



Source: Bradenton Area Convention and Visitors Bureau, Visitor Profile (July 2022)

Macroeconomic Conditions

According to reports by the Bradenton Area Economic Development Corporation (EDC), the Gross Domestic Product in Manatee County increased by 30% between 2010 and 2020, bringing in nearly $14.08 billion in 2020. Table 2-17 shows the breakdown of the GDP figures by industry for 2010 and 2020.

Table 2-17: Manatee County Gross Domestic Product Statistics

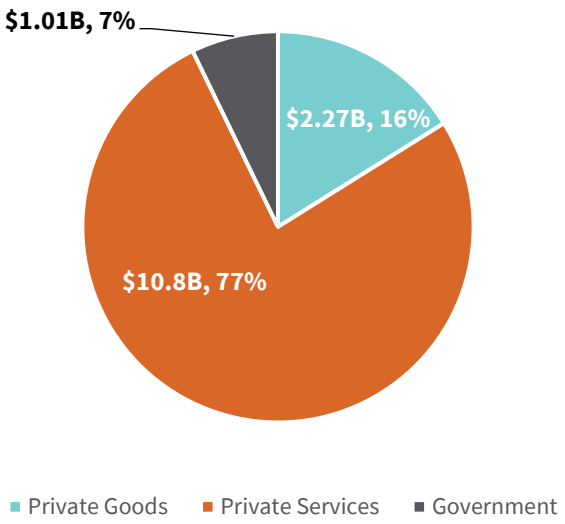
Industry	2010	2020	Percent Change
Agriculture, forestry, fishing, and hunting	$390M	$369M	-5%
Mining, quarrying, and oil and gas extraction	$7M	$39K	-99%
Utilities	$545M	$527M	-3%
Construction	$702M	$939M	34%
Manufacturing	$839M	$960M	15%
Wholesale trade	$579M	$656M	13%
Retail trade	$806M	$1.237B	53%
Transportation and warehousing	$106M	$191M	80%
Information	$172M	$362M	111%
Finance, insurance, real estate, rental, and leasing	$2.542B	$3.839B	51%
Professional and business services	$1.178B	$1.572B	33%
Educational services, health care, and social assistance	$1.021B	$1.333B	31%
Arts, entertainment, recreation, accommodation, and food services	$568M	$713M	26%
Other services (except government and government enterprises)	$315M	$364M	16%
Government and government enterprises	$1.060B	$1.012B	-4%
Total	**$10.83B**	**$14.08B**	**30%**

Source: Bureau of Economic Analysis, 2010-2020

The most notable changes in GDP can be observed in the 99% decrease in GDP for the Mining and Gas Extraction industry and the slight decrease in agriculture, forestry, fishing, and hunting. The largest increase in GDP can be observed in the information sector which jumped up to $362 million in 2020, an 111% increase from 2010, indicating significant growth in this industry in Manatee County. Moreover, the finance, insurance, real estate, rental, and leasing industry continues to grow, with a 51% increase in GDP from 2010 to 2020.

Figure 2-16 shows a summarized chart indicating the GDP by industry sector. In summary, 77% of the 2020 Manatee County GDP were generated by private services, 16% were generated by private goods, and 7% were generated by government enterprises, indicating a strong private sector contributing to the total GDP, as well as a strong service sector.

Figure 2-16: Gross Domestic Product by Manatee County Industry Sector



Source: Bureau of Economic Analysis, 2010-2020

Land Uses and Densities

The future land use maps for Manatee County, the City of Bradenton, and the City of Palmetto are shown in Figures 2-17, 2-18, and 2-19, respectively. Reviewing and understanding future land use designations is important as it illustrates the vision at the county and/or municipal level for growth and development patterns. Transit supportive land uses include high density/multi-family residential areas, mixed-use areas, designated office areas, and community spaces. A review of emerging land uses was conducted based on the Manatee County, Bradenton, and Palmetto future land use maps.

Manatee County Future Land Use

Figure 2-17 shows the Manatee County future land use map. After review of the map, the following patterns were noted:

- Mixed-Use categories are generally found near the I-75 corridor.
- The areas close to the Future Development Area Boundary on the east are designated as Urban Fringe uses, with 3.0 dwelling units per acre.
- The eastern part of the county is mostly designated for agricultural uses, including parts that are near the Manatee River; only certain portions surrounding the river are designated for conservation.
- The areas south of Bradenton and north of the Sarasota County line are designated as Residential/Office/Retail (ROR) or Residential with 16.0 dwelling units per acre along the various road corridors that intersect the unincorporated parts of the county.
- The areas surrounding the CSX railroad going north-south are designated as Industrial Heavy or Industrial Light.

Figure 2-17: Manatee County Future Land Use Map

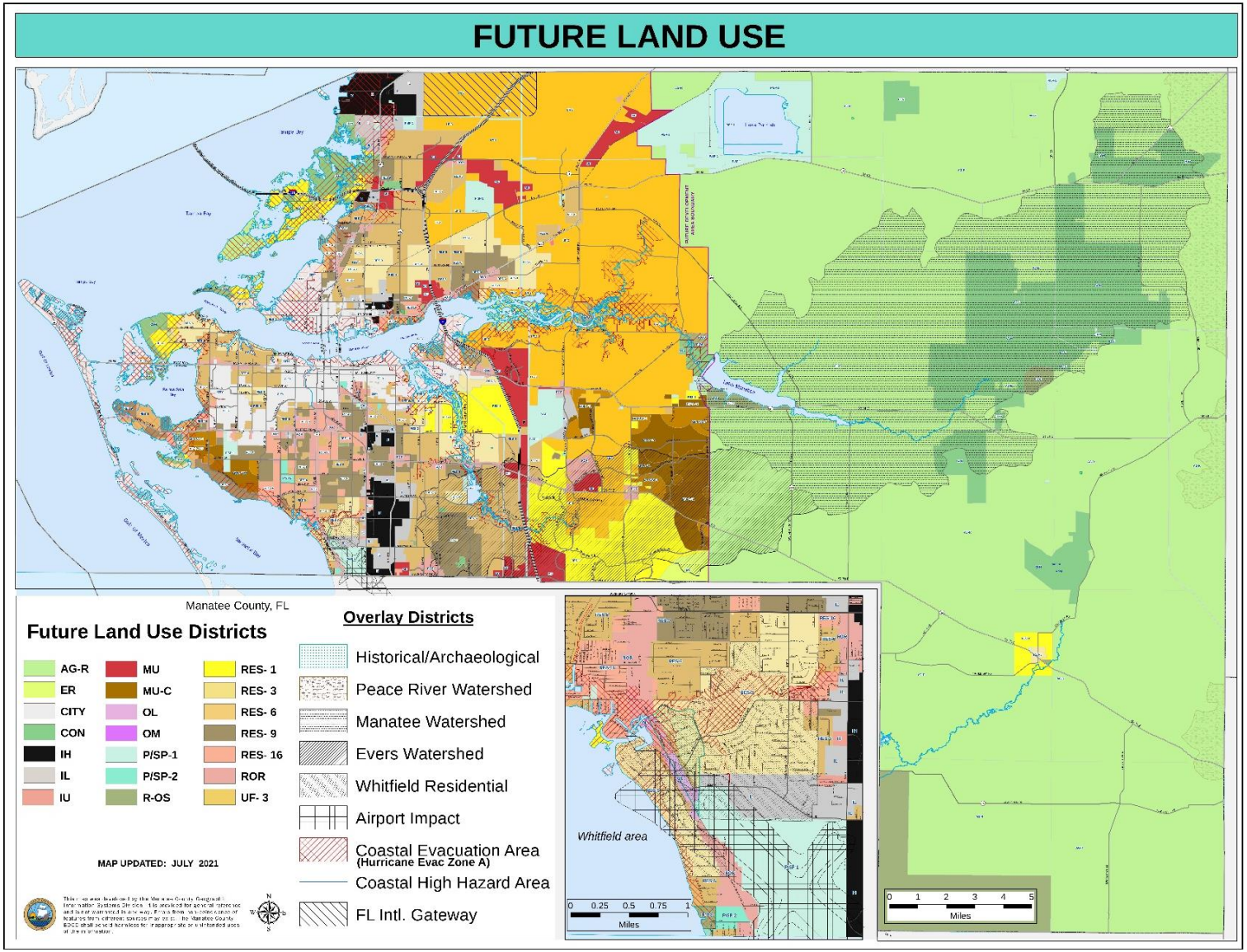


Figure 2-18: City of Bradenton Future Land Use Map

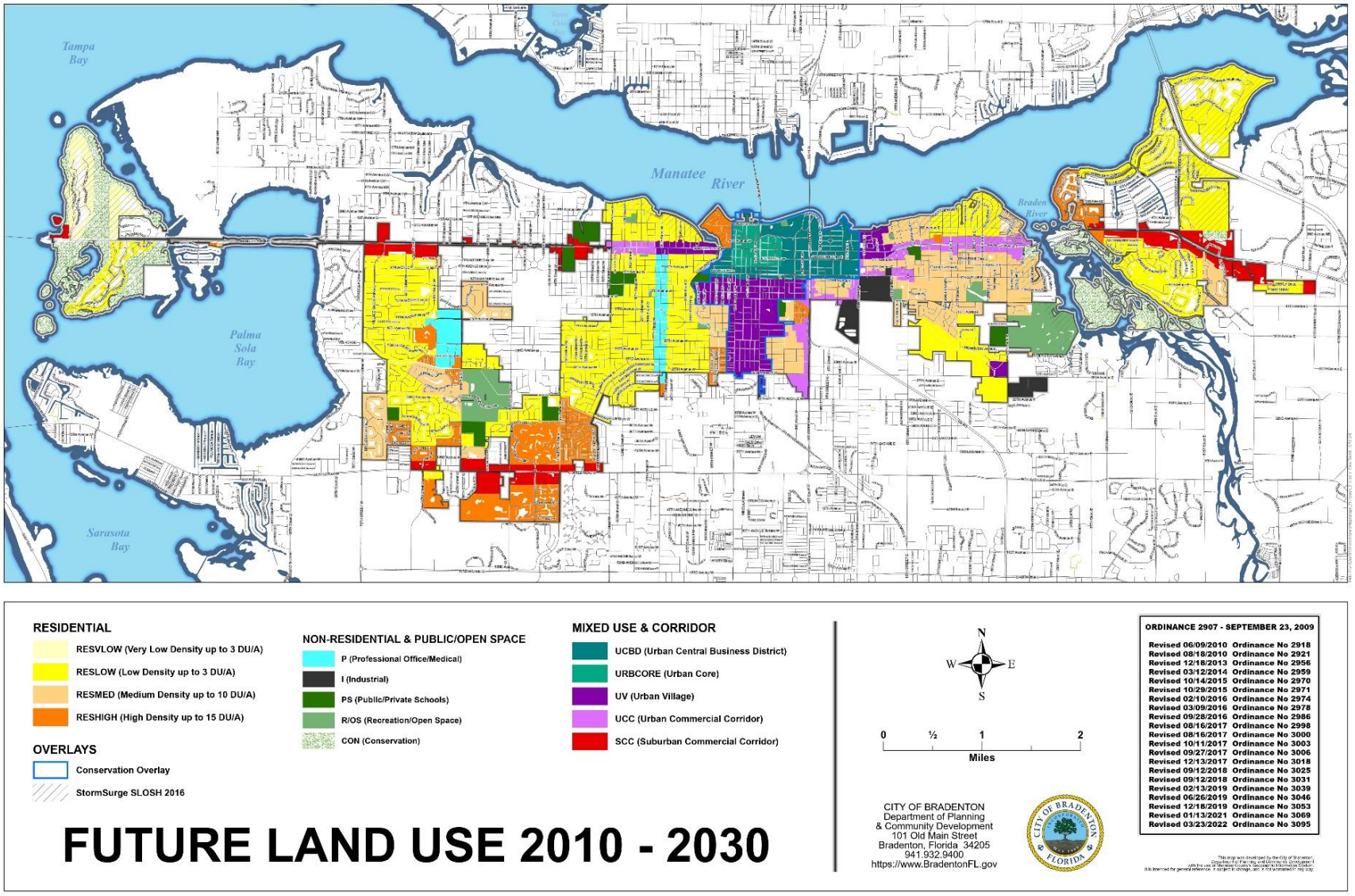
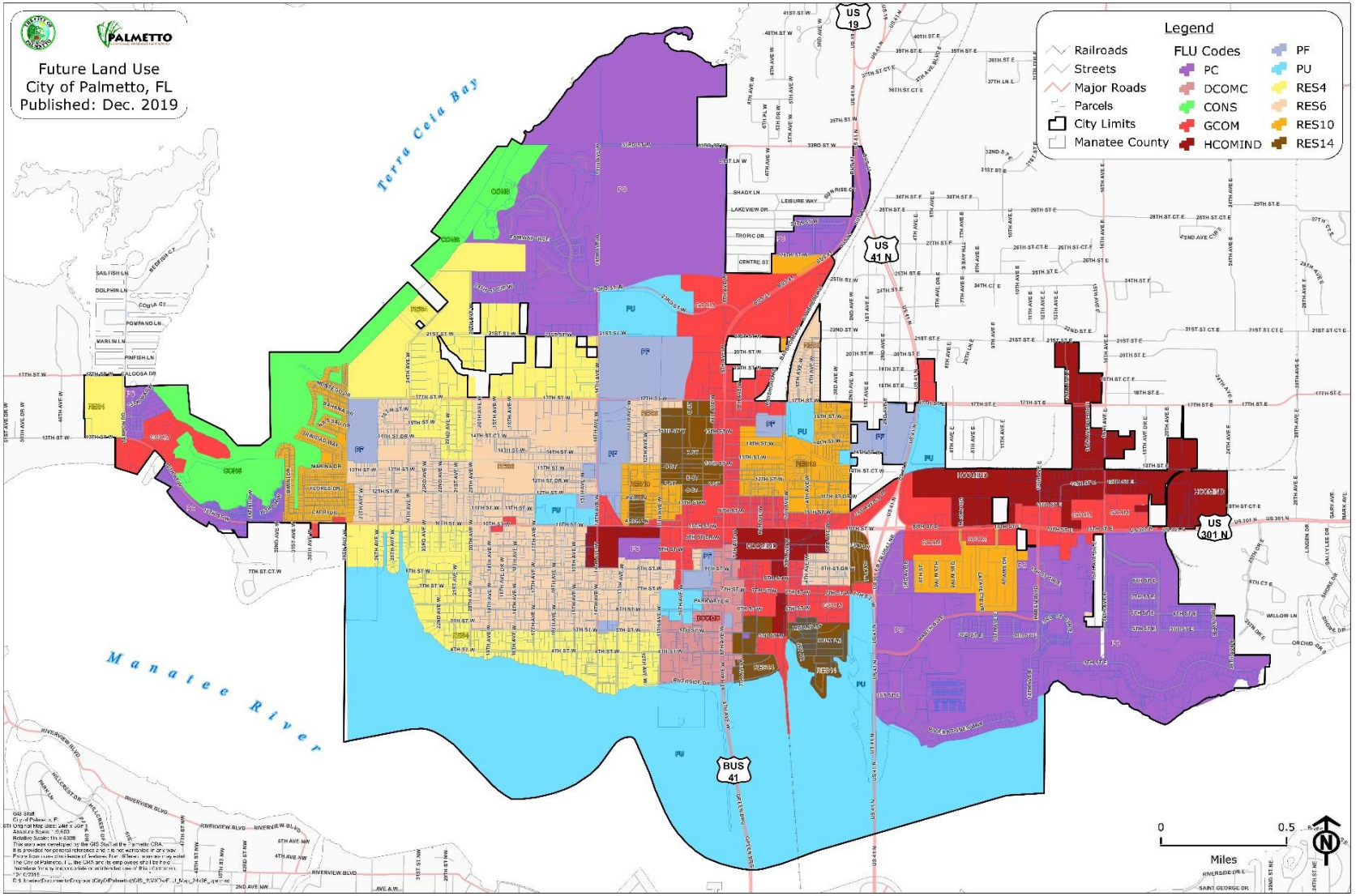


Figure 2-19: City of Palmetto Future Land Use Map



Bradenton Future Land Use

Figure 2-18 shows the City of Bradenton's future land use map. It is important to note that Bradenton uses form-based code, suggesting greater detail in the mix of uses and the form of the buildings rather than to the actual use. After review of the map, the following patterns were noted:

- The Urban Core and Central Business District are surrounded by areas designated as Urban Village, which allows for 30 dwelling units per acre.
- The area surrounding 26th Street West is designated for professional offices and medical uses.
- The area to the east of the Urban Core is designated predominantly for Residential Medium uses.
- The area surrounding Cortez Road is designated as Residential High after a buffer of areas designated as Suburban Commercial Corridor.
- The islands on the Braden River are designated as conservations areas, as well as the land along Manatee Avenue on the western side near Palma Sola Bay.
- There is very little acreage designated for Industrial uses; however, some of these are located just southeast of the Urban Core.

Palmetto Future Land Use

Figure 2-19 shows the City of Palmetto's future land use map. After review of the map, the following patterns were noted:

- The areas surrounding the Terra Ceia Bay are designated for Conservation.
- Large areas in the northern section of the city and in the southeastern section of the city are designated for Planned Communities.
- The land around US 301, US 19, and US 41 are designated for General Commercial purposes or for Heavy Commercial Industrial uses.
- The area surrounding the downtown is considered mostly composed of residential uses for more than 10 or 16 dwelling units per acre.

Future land uses can help forecast the growth directions and aspirations of a community or an area. Transit directly benefits from a mixture of high-density, compact land uses. Higher density residential and commercial land uses tend to support more multimodal transit services and foster a setting that supports higher transit ridership with both discretionary and traditional ridership markets. The design of public facilities such as roadways and sidewalks, which affect transit access, is a direct result of land use decisions. Implementing high density land uses increases sustainability by encouraging walkability and transit use. The relationship between transit and land use is more carefully reviewed as part of the LRTP, in which transit is examined within the context of a 25-year horizon.

The land uses in Manatee County are primarily suburban around I-75, with many planned communities and low-density residential areas being zoned in the area. The Bradenton and Palmetto areas are generally higher in density, as well as the unincorporated areas south of

Bradenton. This area, generally west of the CSX rail line, has higher potential for investments in transit developments both now and in the future considering that the area is being zoned for higher densities of commercial and residential land uses.

Trends in Major Developments

Manatee County continues to experience an increase in development. The Manatee County Property Appraiser maintains detailed records of permits issued in unincorporated parts of the county. The issuance of permits and the information attached can help inform the various trends regarding current development. Table 2-18 shows the number of commercial and residential permits issued between 2012 and 2021 across unincorporated Manatee County.

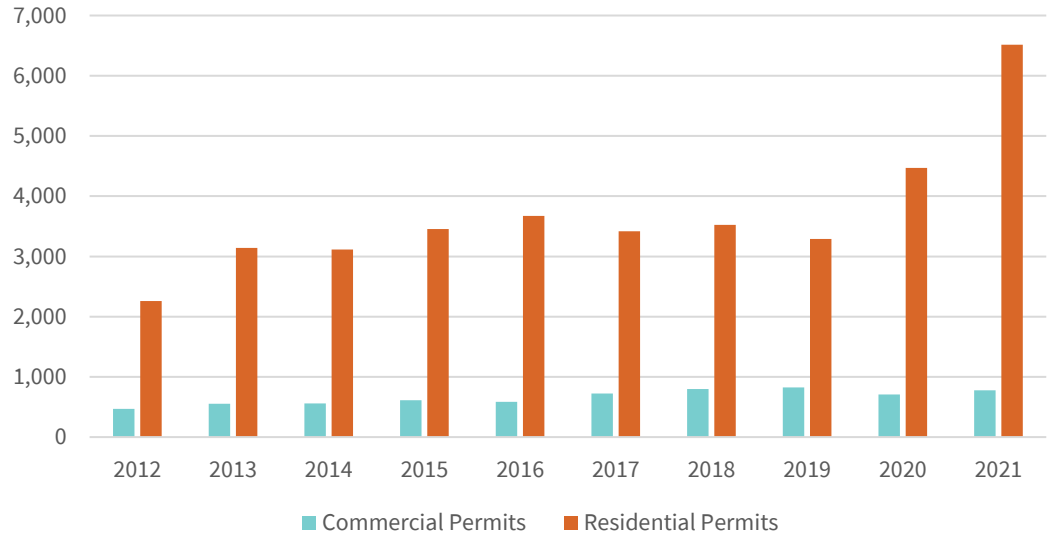
Table 2-18: Manatee County Commercial and Residential Permits Data

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	% Change
All Commercial	471	552	558	612	588	721	800	823	706	779	65%
All Residential	2,259	3,141	3,115	3,454	3,673	3,420	3,525	3,291	4,470	6,517	188%
Single Family Only	*2,225*	*3,058*	*3,040*	*3,376*	*3,615*	*3,396*	*3,481*	*3,259*	*4,458*	*6,496*	191%
Multi Family Only	*34*	*83*	*75*	*78*	*58*	*24*	*44*	*32*	*12*	*21*	-38%
Total	**2,730**	**3,694**	**3,673**	**4,066**	**4,261**	**4,141**	**4,325**	**4,114**	**5,176**	**7,296**	**167%**

Source: Manatee County Property Appraiser

A steady increase in residential permits overall indicates a steady growth in the investment of new residential developments in Manatee County. Overall, residential permits have increased about 188% between 2012 and 2021, with 2021 alone accounting for about 6,500 permits, nearly three times the number of permits issued in 2012. While the number of permits for multifamily developments is more sporadic, permits for single family homes helps to indicate a demand for housing in the area. At the same time, this trend shows that the direction of residential development is strongly focused on single family development, generally less favorable for the implementation of public transit. Commercial growth is also seen to expand as a 65% increase in commercial permits was observed within the same time period. Figure 2-20 compares the number of commercial permits issued to the number of residential permits issued.

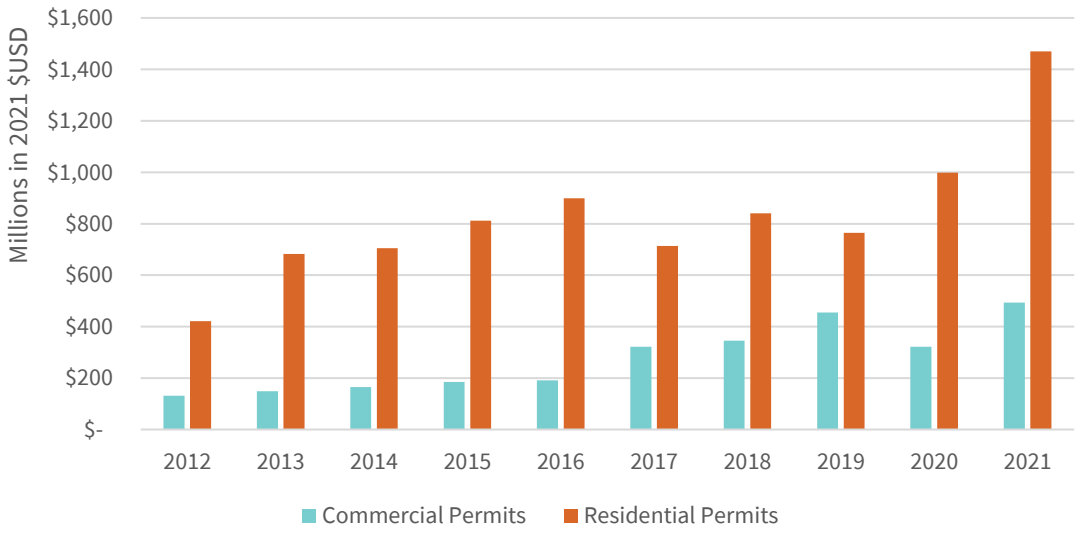
Figure 2-20: Number of Commercial and Residential Permits Filed



Source: Manatee County Property Appraiser

Residential and commercial investment does not seem to stop their current growth rate either. Figure 2-21 shows the gross permit revenue in 2021 U.S. dollars as a measure of continued investment from developers in Manatee County for residential and commercial developments.

Figure 2-21: Permit Revenue by Permit Type 2012 - 2021



Source: Manatee County Property Appraiser

While development experienced a growth dip between 2016 and 2020, the numbers grew significantly in the pandemic period between 2020 and 2021. A large migration of new residents into Florida in general was observed in that time period, leading to greater investment in the area

to accommodate this growth. A dip in commercial investment in 2020 can be attributed to a potential shift in commercial use as a result of the pandemic and can be seen in a reduced growth rate between 2019 and 2021.

Summary

Manatee County continues to experience a trend of continued population and economic growth, which is not only limited to the local context but also to the region. The large influx of new residents as well as the large number of financial investments in the area indicate that this trend will continue in coming years. These conditions naturally will place a gradual strain over the general transportation network in Manatee County, a strain that may provide public transit with an opportunity to help address these conditions.

The demographic composition of Manatee County, however, has much more of an influence over transit utilization than the general population growth trend does. After an evaluation of the base conditions and the demographic composition in Manatee County, there is a sizeable presence of transit dependent users in the area, as well as a decent potential for certain areas to support discretionary transit users. Manatee County benefits from the fact that traditional market users are concentrated in areas with high employment and dwelling unit densities, generating conditions that can support transit. These areas are found within central Bradenton and Palmetto. Moreover, the County benefits from a few sporadic areas spread throughout the county that would have similar conditions. This would place a strain on transit coverage since it would stretch service coverage in such a way that would attempt to reach multiple distant areas away from the core. In addition, major trip generators combined with high dwelling unit densities near the beaches of Anna Maria Island, to provide another area that is favorable for transit. These areas show the greatest potential to support a transit network.

The land use design of the county in many areas is generally suburban, particularly east of Bradenton and Palmetto. While these suburban areas are less favorable for public transit relative to Palmetto and Bradenton, new technology-based transportation alternatives such as Mobility-on-Demand (MOD) may be more capable of addressing mobility needs in these areas. Considering that MCAT has already implemented a couple of pilot MOD programs, it should remain a consideration that these areas could be served by MOD. MCAT may wish to consider performing an in-depth evaluation for such service and its potential.

3.0 Operating Conditions

Existing public transportation services in Manatee County include fixed-route, on-demand shuttle services, and paratransit services. All services provided by MCAT are operated by the Manatee County Public Works Department and serve residents and visitors in the county. Map 3-1 shows the transportation services provided within MCAT's service area. The coverage area for all three services essentially encompasses the urbanized portion of Manatee County. The suburban areas surrounding I-75 and to the east, however, have less coverage.

In November 2022, MCAT implemented a fare-free policy on all services. This initiative took place as a strategy to increase the utilization of public transit within the community.

This section provides an in-depth overview of MCAT's services, ridership trends, operating facilities, fares, and other key characteristics in which the agency operates.

Fixed Route Services

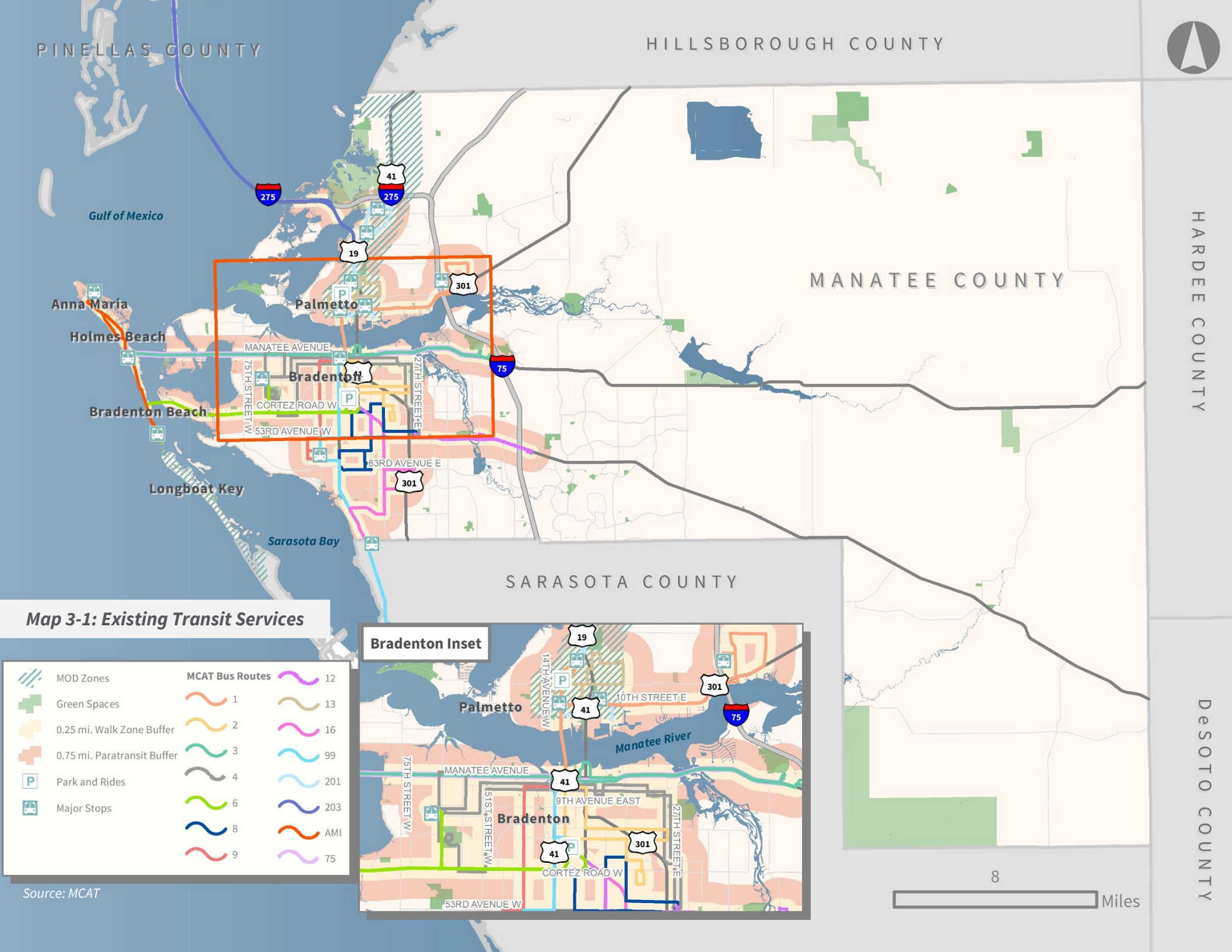
MCAT operates a total of 15 bus routes as part of its fixed-route network, including 11 local routes, 2 trolleys, and 2 regional routes. These services are described in more detail below.

Local Services

Eleven local routes serve the western portion of Manatee County, most of which provide services either in a north-south direction or an east-west direction. Routes 2, 8, 9, and 16 generally travel out from either the Downtown Station or the DeSoto Station southwards, facilitating transit from downtown Bradenton to the various communities just south of the city. Routes 3, 4, 6, and 12 travel from I-75 to the west to the communities on the beaches.

Routes 1, 13, and 201 travel north out of the Downtown Station and facilitate transit in Palmetto, Ellenton, and the communities north of the Manatee River. These routes generally loop around and help connect transit users to Bradenton and the beaches. These routes also tend to have a shorter span of service as well as lower service frequency than the routes that provide service in and south of Bradenton.

All local routes operate Monday to Saturday except for Routes 9 and 203, which operate only on weekdays. Most local routes operate on a 60-minute frequency except for Route 3, which operates on a 30-minute frequency, and Routes 13 and 201, which operate every 120 minutes. Most local routes have spans of service that start between 5:30 AM and 6:00 AM and stop between 7:00 PM and 7:30 PM. Routes 3 and 6 have extended evening hours, ending service at 8:20 PM and 9:25 PM, respectively.



Map 3-1: Existing Transit Services

Source: MCAT

Regional Services

Two bus routes provide regional commuter services to and from Manatee County. Route 99 provides service along US 41 from the Downtown Station to downtown Sarasota on weekdays and Saturdays. Route 99 is a fixed-route service operated by both MCAT and Sarasota County's transit system, Breeze Transit. The two agencies provide frequent service every 20 minutes by alternating buses from each agency. The route operates between 5:15 AM and 9:30 PM, making it one of the most operationally efficient routes in the MCAT system by every performance measure.

Route 203, the Skyway ConneXion, provides two round trips throughout the day on weekdays, starting at the DeSoto Station and ending at the Bay Pines Veterans Affairs (VA) Hospital in Pinellas County. The bus stops at the Downtown Station and the Palmetto Station before crossing over the Skyway Bridge towards the Grand Central Terminal west of downtown St. Petersburg, and Tyrone Square Mall. The total run lasts about 110 minutes; the morning bus leaves DeSoto Station at 9:05 AM before returning at 11:55 AM in the morning, while the afternoon bus leaves DeSoto Station at 2:05 PM and returns at 4:55 PM.

Trolley Services

Two bus routes operate as a trolley service, meaning that it has a lower rider capacity and operates routes with specialized purposes. The Anna Maria Island (AMI) Trolley (designated as Route 5) operates along the beaches on Anna Maria Island from the Anna Maria Island Pier in the north to Coquina Beach in the south. The route operates every day of the year except for holidays and operates on a 20-minute frequency. The AMI Trolley operates a lengthy span of service from 6:00 AM to 10:43 PM. The route serves both residents and tourists.

Source: Bradenton Gulf Islands Facebook Page

The Beach ConneXion Shuttle (designated as Route 75) is a seasonal trolley that operates between December and April each year and connects transit riders between Beachway Plaza at the intersection of 75th Street West and Manatee Avenue up to the Manatee County Public Beach. It complements service on Route 3 and is intended for beachgoers to help alleviate heavy traffic coming into Anna Maria Island. The service operates every 40 minutes and operates between 9:40 AM and 5:57 PM on weekends only.

On-Demand Shuttle Services

In recent years, mobility-on-demand services have been implemented by many transit agencies as a way to provide flexible service arrangements. MOD is most successful in areas that would benefit from transit but where a fixed-route bus may not adequately connect most local amenities; generally in places where a low density of housing and commercial uses are present. MOD vehicles are lower capacity buses that can carry a maximum of 12 people on board. MOD trips are usually requested as door-to-door services within a certain area or neighborhood and often connect to

local transit stops and amenities that would be otherwise challenging to connect using a single fixed route. In other MOD instances, a bus can deviate from its route to a nearby destination. MOD service can also operate under different naming designations such as microtransit, deviated route service, dial-a-ride, or on-demand shuttles.

MCAT currently operates two such services and is evaluating the potential expansion of MOD into other areas. MCAT asks that passengers make a reservation by 5:00 PM the day before the service is desired and up to 14 days in advance. The service is currently only able to be reserved via telephone call at (941) 748-2317. Frequent service users can enroll in subscription services. Currently, the on-demand services also allow walk-up service at designated bus stops and drivers will provide drop-offs at designated stops. The services operate Monday through Sunday between 6:00 AM and 5:00 PM.

Longboat Key Shuttle

The Longboat Key Shuttle has been in operation since 2017, replacing the Longboat Key Trolley. The coverage area includes the part of Longboat Key between Coquina Beach and the CVS Pharmacy at Bay Isles Parkway. Walk-up service is provided at Coquina Beach, where riders may transfer to Route 6 or the AMI Trolley, the Shoppes of Bay Isles, and several designated bus stops along Gulf of Mexico Drive within the defined service area.

Port Manatee ConneXion Shuttle

The Port Manatee ConneXion Shuttle began operating in 2021 in northern Manatee County covering an area that follows a general buffer around US 41 between Port Manatee and the Palmetto Station. The defined area coincides with Routes 1, 13 and 201 and is generally complemented by these routes. Walk-up service is provided at the Palmetto Walmart, the Palmetto Transfer Station, and the Route 201 Rubonia stop. Trips on this service are observed to be generally low.

Paratransit Services

MCAT's Handy Bus is a door-to-door service that serves as a complementary paratransit service to the existing fixed-route system. Handy Bus offers two types of paratransit services, one for Americans with Disabilities Act (ADA) eligible clients and one for Transportation Disadvantaged (TD) eligible clients. The Handy Bus operating hours correspond to the hours of operation of the fixed-route service. At present, MCAT maintains a fleet of 45 paratransit vehicles to provide the Handy Bus service.

Complementary ADA Service

MCAT's complementary ADA service, referred to as Handy Bus, is a door-to-door service that is provided for individuals with disabilities who are unable to use regular fixed-route buses. This service is provided in accordance with the ADA, which does not require all transportation needs of individuals with disabilities to be served, but that they be provided with an equal opportunity to access public transit. Service is requested in advance and is provided within three-quarters of a mile of any transit route with the exception of express services. Handy Bus vehicles are equipped

with lifts to help clients using wheelchairs access these services. ADA clients must apply and meet federal eligibility requirements to use the service, which includes the provision of a medical certification.

Upon service request, clients are asked to provide details about medical appointments and, if necessary, information about an accompanying companion. Subscription services are provided, which include the creation of a standing order in the dispatch system. Centralized group trips are coordinated for passengers traveling to or from a common origin or destination at or around the same time.

Transportation Disadvantaged Services

The Transportation Disadvantaged (TD) program is a discretionary program that provides transportation assistance to individuals in the community who, because of age (60 years or older), low-income status, or disability, do not have access to transportation services. The Manatee County Board of County Commissioners is the designated Community Transportation Coordinator (CTC) for Manatee County and is tasked with arranging transportation for TD individuals. The TD services are provided through an ongoing funding partnership between the Florida Commission for Transportation Disadvantaged (FCTD) and Manatee County. TD individuals are mobilized through the Handy Bus service, like ADA clients, except that they are not restricted to moving within a buffer zone from transit lines; instead, TD clients are able to utilize Handy Bus to travel throughout the entire county. Whenever demand for ADA paratransit services is high, booking parameters are followed to prioritize ADA client trips before certain TD trips. Generally, TD client trips to medical locations or to employment sites are accommodated under these circumstances, however, trips to grocery stores may be among those trips that are limited. To use the TD program, a potential TD client can complete a TD application form and provide the required household income, residency, travel information, and supporting documentation, and return it to MCAT by mail or in person. The applicant is notified of eligibility within a two-week period.

Transit Facilities

MCAT owns, maintains, and operates a number of facilities that accommodate the provision of its services. They are described below.

Administration and Maintenance Facilities

MCAT service administration, operations, and maintenance functions operate from a single location on Tallevast Road in southern Manatee County. The 116,000-square foot facility opened in 2016 and is capable of supporting future facility expansions as service growth occurs.

Transfer Stations

MCAT's transfer stations are the key hubs at which the majority of the local service and many trolley service routes connect and are located near the core of the county and close to major activity centers.

Source: ZNS Engineering

- The Downtown Bradenton Station is located at 601 13th Street West. Routes 1, 2, 3, 4, 9, 13, 99, 201, and 203 connect to this station as well as the Port Manatee On-Demand Shuttle.
- The Palmetto Transfer Station is located at 1802 8th Avenue West. Routes 1, 13, 201, and 203 connect to this station as well as the Port Manatee On-Demand Shuttle.
- The DeSoto Transfer Station is located at 820 301 Boulevard West. Routes 2, 6, 8, 12, 16, 99, and 203 connect to this station.

Park-and-Ride Facilities

MCAT currently operates two park-and-ride lots at the DeSoto Transfer Station and the Palmetto Transfer Station. Parking spaces are available for commuters who wish to park and travel either locally, into Pinellas County via Route 203, or into Sarasota County via Route 99. The DeSoto Station has three designated parking spots. The Palmetto Station has its own lot that is gated and fenced for added security, and includes 32 parking spaces and 2 handicap parking spaces.

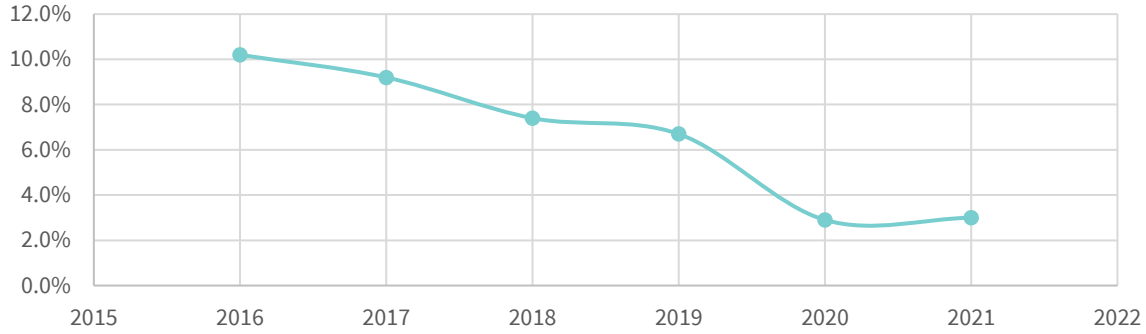
Existing Transportation Provider Inventory

In addition to the services MCAT offers, there are other transportation providers operating within and connecting to MCAT's service area. While some of these services complement MCAT services, these transportation providers also generally compete with the services that MCAT provides. A detailed list of providers can be found in Appendix B and offers a complete picture of available services from a regional perspective.

Fare Structure

MCAT has made its services fare-free as of November 1, 2022. The agency plans to revisit this fare policy after 18 months to see if they can remain fare-free long term. Prior to the fare-free program, MCAT had a regular bus fare of $1.50 for all routes except for the Anna Maria Trolley, and a discount bus fare of $0.75 for seniors ages 60 to 79, persons with a disability, students, Medicare recipients, active-duty military personnel, and veterans. Finally, seniors over 80 years old and children under 5 years old were able to ride for free. Prior to the fare-free program's implementation, the farebox recovery ratio declined from 10.2% in 2016 to 6.7% in 2019. During the COVID-19 pandemic, the ratio dropped dramatically to 2.9% in 2020, as can be observed in Figure 3-1. This drop can be attributed to a temporary fare-free policy implemented during a part of the pandemic period.

Figure 3-1: Farebox Recovery Ratio (2016 – 2021)



Source: Florida Transit Information System (FTIS)

MCAT Fixed-Route Service Profile

Table 3-1 includes the service profile of MCAT's current fixed-route bus services. Additionally, descriptive data about each route is provided, including the average daily revenue hours that each route operated in FY 2022.

Table 3-1: Fixed-Route Service Profile

Route Type	Route ID	Route Description	Frequency (minutes)	Service Span	Daily Revenue Hours	Passenger Trips
Regional	1	Ellenton Outlet Mall	60	5:28 AM – 7:34 PM	20.4	53,937
Local	2	East Bradenton	60	5:50 AM – 7:41 PM	15.3	43,490
Regional	3	Manatee Avenue	30	5:50 AM – 9:25 PM	54.0	153,948
Local	4	9th Avenue East and West	60	5:47 AM – 7:25 PM	27.0	56,586
Regional	6	Cortez Road	60	5:20 AM – 8:21 PM	28.3	100,014
Local	8	Oneco – Bayshore Gardens	60	6:05 AM – 7:24 PM	19.2	49,119
Local	9	9th Avenue West	60	5:50 AM – 7:11 PM	13.3	25,763
Local	12	State Road 70	60	5:50 AM – 7:20 PM	13.9	27,671
Local	13	Palmetto	120	5:55 AM – 6:57 PM	12.1	27,012
Local	16	15 Street East	60	5:45 AM – 7:42 PM	16.9	63,001
Trolley	75[1]	Beach ConneXion Shuttle	40	9:40 AM – 5:57 PM	5.85	93
Regional	99[2]	US 41	20	5:15 AM – 9:28 PM	45.5	216,606
Local	201	North County ConneXion	120	7:20 AM – 4:45 PM	7.3	16,878
Regional	203	Skyway ConneXion	Two trips per day	9:00 AM – 11:55 PM 2:05 AM – 4:55 PM	6.8	3,302
Trolley	5	Anna Maria Island Trolley	20	6:00 AM – 10:43 PM	46.5	407,428
MOD	LBK	Longboat Key Shuttle		8:00 AM – 5:00 PM	9.0	3,189
MOD	PMX	Port Manatee ConneXion Shuttle		8:00 AM – 5:00 PM	9.0	14

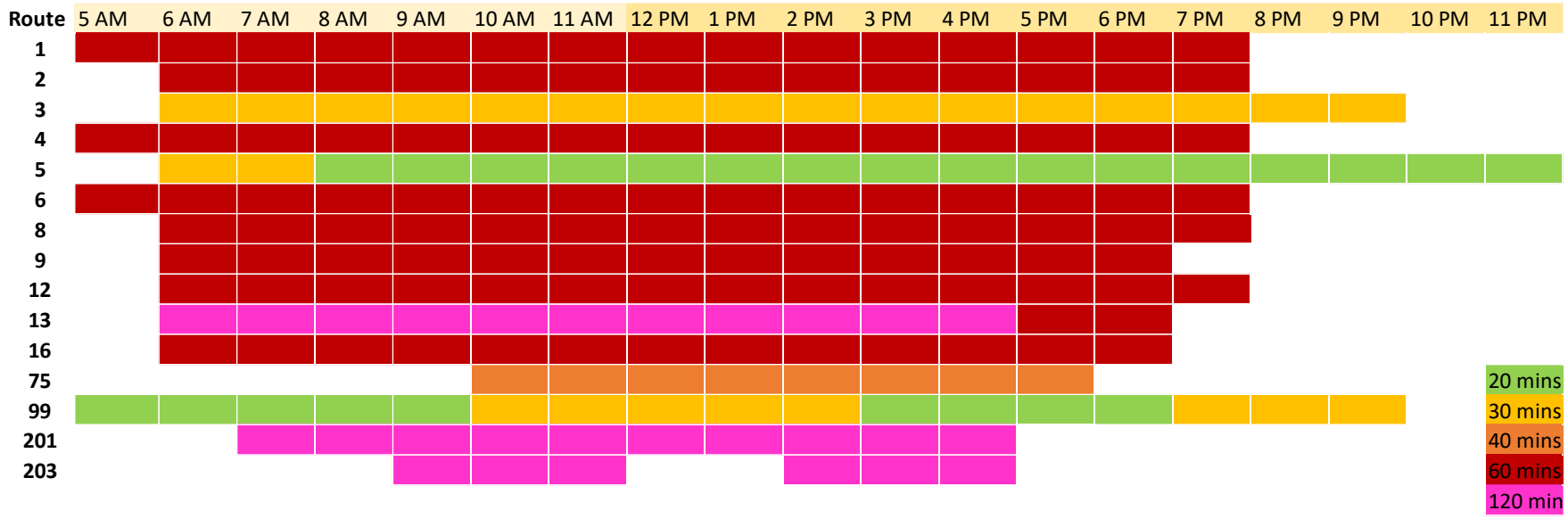
[1]Seasonal Service: December through April

[2] Route 99 is a jointly-operated route with Sarasota County's Breeze Transit

The most frequent routes in the MCAT system are Route 99 and the Anna Maria Island Trolley, both providing 20-minute headways during peak hours. Route 13, the North County ConneXion, and the Skyway ConneXion provide the lowest service frequency with 120-minute headways during peak hours. Figure 3-2 shows a detailed chart that aids in visualizing the various service spans and frequencies for each route.

Route 3, the Anna Maria Island Trolley, and Route 99 operate the most daily revenue hours among all routes, providing more than 45 hours of daily service. The Beach ConneXion Shuttle, the North County ConneXion, and the Skyway ConneXion operate with the least amount of daily revenue hours, providing less than eight hours of service each. Moreover, the Beach ConneXion Shuttle is a seasonal shuttle that operates between December and April, limiting its annual revenue hours.

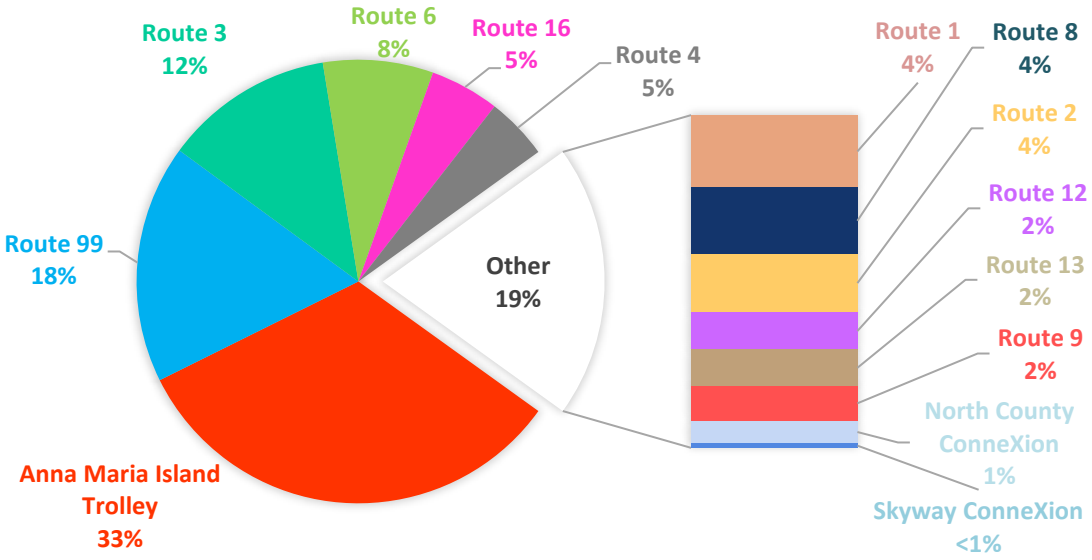
Figure 3-2: Detailed Service Span and Frequencies by Route



Source: MCAT

The Anna Maria Island Trolley had the highest ridership of all routes at 407,428 passengers in FY 2022. The route with the lowest ridership for the same year was the Skyway ConneXion with 3,302 passengers. Figure 3-3 shows the share of total system ridership by route for FY 2022.

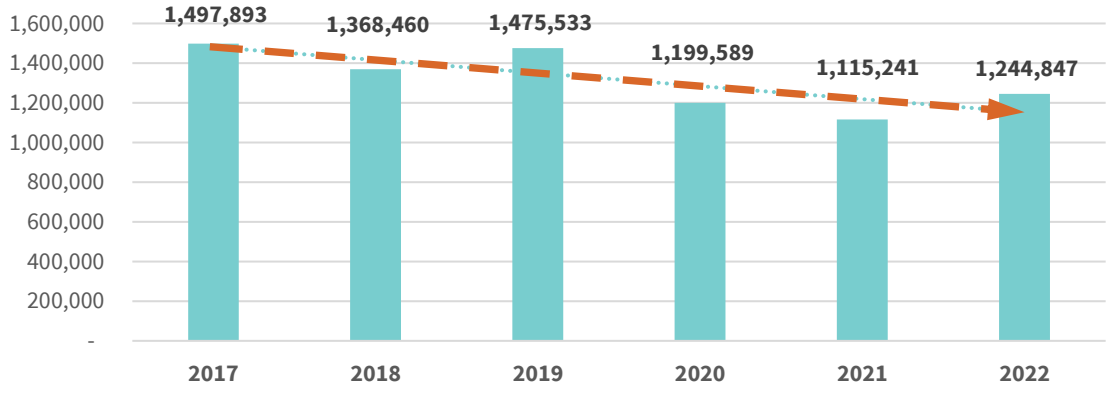
Figure 3-3: Percentage of Systemwide Ridership by Route



Source: MCAT

Between 2017 and 2019, ridership fluctuated in the range of 1.3 million and 1.5 million riders. However, due to the COVID-19 pandemic, MCAT fixed-route services saw a decrease of over 360,000 passenger trips from 2019 to 2021. In 2022, ridership increased over 11%, demonstrating some degree of recovery from the impacts of the pandemic. Systemwide fixed-route ridership performance for 2017-2022 is presented in Figure 3-4.

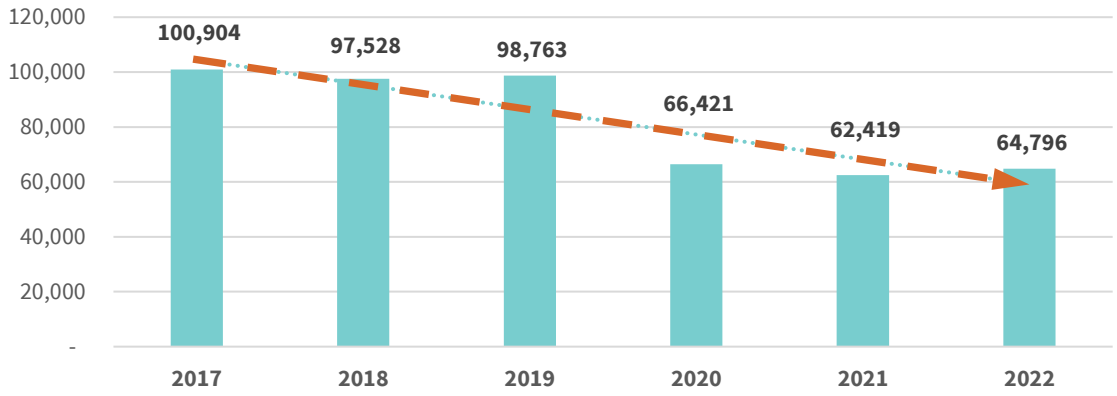
Figure 3-4: Fixed-Route Ridership, 2017-2022



Source: NTD FTIS and MCAT

In FY 2020, MCAT paratransit service provided 66,421 passenger trips, down more than 30,000 trips from 98,763 in FY 2019. The number of trips had remained relatively steady between 2017 and 2019, not deviating far from 100,000 passenger trips annually. However, the sharp decrease in FY 2020 is largely due to limited-service provision during the COVID-19 pandemic. A recovery in pre-pandemic ridership numbers for paratransit has still not been achieved in 2022. Systemwide paratransit ridership performance for 2017-2022 is presented in Figure 3-5.

Figure 3-5: Paratransit Ridership, 2017-2022



Source: NTD FTIS and MCAT

Route-Level Performance Evaluation

MCAT provides transit service indicators and key measures that can help evaluate the performance of each individual route. A route-level performance evaluation can help in comparing routes individually and analyze what services are performing efficiently. Performance for each of MCAT's fixed routes was assessed in terms of the following performance indicators and measures:

- Total ridership
- Total revenue hours
- Passengers per revenue hour
- Total revenue miles
- Passengers per revenue mile
- Vehicles operated in maximum service (VOMS)

These indicators and performance measures, shown in Table 3-2, were used to develop a route comparison matrix to rank routes according to overall performance in the key metrics as compared to the average of overall system performance.

Table 3-2: Route Level Performance Evaluation, FY 2022

Route	Ridership	Revenue Hours		Revenue Miles		VOMS
		Total	Passengers Per Rev. Hour*	Total	Passengers Per Rev. Mile*	
5 - Anna Maria Island Trolley	407,428	16,894	24.12	228,655	1.78	3
99 - US 41	216,606	13,922	15.56	191,674	1.13	6
16 - 15th Street East	63,001	5,160	12.21	87,274	0.72	1
6 - Cortez Road	100,014	8,668	11.54	120,120	0.83	2
3 - Manatee Avenue	153,948	16,524	9.32	269,099	0.57	4
2 - East Bradenton	43,490	4,671	9.31	57,242	0.76	2
1 - Ellenton Outlet Mall	53,937	6,239	8.64	92,862	0.58	1
8 - Oneco - Bayshore Gardens	49,119	5,878	8.36	87,537	0.56	1
9 - 9th Avenue West	25,763	3,390	7.60	43,290	0.60	1
201 - North County ConneXion	16,878	2,301	7.34	34,591	0.49	1
13 - Palmetto	27,012	3,690	7.32	38,091	0.71	1
4 - 9th Avenue East and West	56,586	8,267	6.84	118,570	0.48	2
12 - SR 70	27,671	4,258	6.50	73,094	0.38	1
203 - Skyway ConneXion	3,302	1,563	2.11	34,508	0.10	1
75 - Beach ConneXion**	93	172	0.54	2,272	0.04	1
System Average	**88,990**	**6,773**	**12.25**	**98,592**	**0.84**	**2**
Analysis Threshold			**9.19**		**0.63**	
Totals	**1,244,847**	**101,598**		**1,478,879**		**25**

Source: MCAT

*MCAT evaluates route performance using an analysis threshold of 25% below the systemwide average for passengers per revenue hour and passengers per revenue mile. Routes highlighted in green are performing at or above the systemwide average. Routes performing above the analysis threshold but below the average are highlighted in yellow. Routes highlighted in red are performing below the analysis threshold.

** Seasonal Service: December through April

Route-Level Evaluation Summary

A profile of MCAT's fixed-route bus services and a high-level route comparison analysis is summarized below for the most recently completed fiscal year (FY 2022), providing an up-to-date view of how the fixed-route service is performing.

- The Anna Maria Island Trolley (Route 5) and Route 99 are the top-performing routes in average number of passengers per revenue hour and per revenue mile, performing above both system average metrics.
- The lowest performing routes are the Beach ConneXion (Route 75), Skyway ConneXion (Route 203), Route 12, and Route 4. It is generally expected that the Skyway ConneXion would record lower numbers under both performance metrics due to the nature of this regional service. The Beach ConneXion is also expected to have lower numbers due to its limited hours and seasonal services.
- Notably, Route 3 leads in the number of revenue miles, has the second highest number of revenue hours, and the third highest ridership figure overall. While Route 3 performs within MCAT's analysis performance threshold in the average number of passengers per revenue hour, it underperforms in the number of passengers per revenue mile.
- Route 16 ranks third in number of passengers per revenue hour and per revenue mile despite ranking as the fifth highest ridership route.

System-Wide Trend Analysis

To assess how efficiently MCAT supplies fixed-route transit service and how effectively those services meet the needs of the area, a trend analysis of critical performance indicators and measures was conducted. The trend analysis examines the performance of MCAT's fixed-route services over a five-year period. To complete this trend analysis, data from the Florida Transit Information System (FTIS) were used, which includes validated National Transit Database (NTD) data for the years from 2017 to 2021.

Analysis Indicators and Measures

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

- ***General Indicators*** - quantity of service supply, passenger generation, and resource input
- ***Effectiveness Measures*** - extent to which the service supply generates passenger demand
- ***Efficiency Measures*** - extent to which cost of resource inputs meets the demand output

The trend analysis was organized by type of measure or indicator and includes statistics, figures, and tables to summarize selected system performance indicators, effectiveness, and efficiency measures for the five-year period. The findings of the trend analysis are presented in Table 3-3.

Table 3-3: Trend Analysis, 2017-2021

Indicator/Measure	2017	2018	2019	2020	2021	% Change (2017-2021)	Current Trend	Desired Trend
General Indicators								
Passenger Trips	1,497,893	1,368,460	1,475,533	1,199,589	1,131,515	-24%	↘	↗
Passenger Miles	6,757,796	5,924,889	6,617,965	5,808,067	5,365,302	-20%	↘	↗
Vehicle Miles	1,483,905	1,472,541	1,537,680	1,505,290	1,625,097	9%	-	N/A
Revenue Miles	1,355,597	1,336,838	1,394,373	1,369,498	1,473,175	9%	-	N/A
Revenue Hours	92,805	91,925	96,147	93,882	101,444	9%	-	N/A
Total Operating Expense	$9,270,818	$9,067,354	$10,554,694	$10,890,867	$9,027,429	-3%	-	N/A
Vehicles Operated in Max Service	23	22	23	23	22	-4%	-	N/A
Total Employee FTEs	81	95	99	85	79	-3%	-	N/A
Effectiveness Measures								
Passenger Trips per Capita	4.06	3.71	4.00	3.01	2.83	-30%	↘	↗
Passenger Trips per Revenue Mile	1.10	1.02	1.06	0.88	0.77	-30%	↘	↗
Passenger Trips per Revenue Hour	16.14	14.89	15.35	12.78	11.15	-31%	↘	↗
Average Age of Fleet (in Years)	6.92	7.16	7.19	7.80	6.25	-9%	↘	↘
Efficiency Measures								
Operating Expense per Capita	$25.14	$24.59	$28.62	$27.34	$22.58	-10%	↘	↘
Operating Expense per Passenger Trip	$6.19	$6.63	$7.15	$9.08	$7.98	29%	↗	↘
Operating Expense per Revenue Mile	$6.84	$6.78	$7.57	$7.95	$6.13	-10%	↘	↘
Operating Expense per Revenue Hour	$99.90	$98.64	$109.78	$116.01	$88.99	-11%	↘	↘
Revenue Miles per Vehicle Mile	0.91	0.91	0.91	0.91	0.91	-1%	↘	↗
Revenue Hours per FTE* Employee	1,143.40	972.35	970.82	1,100.75	1,283.73	17%	↗	↗

Source: NTD and MCAT
*Full Time Equivalent

Trend Analysis Summary

- **General Indicators:** Passenger trips decreased by almost a quarter in the observed time period, which is due in large part to the COVID-19 pandemic. This decrease in passenger trips was greatly exacerbated by the situation. Nonetheless, a visible decline in demand for transit has continued and is observable in the downward trend of passenger trips and passenger miles, especially when considering that the local population has increased within the same timeframe. Concurrently, a 3% overall decrease in total operating expenses was observed.
- **Effectiveness Measures:** A reduction of passenger trips per capita shows that MCAT service has experienced some form of decline, indicating a reduction in service demand or attraction. A decline in passenger trips per revenue hour and mile is observable, showing that despite the hours of operation or amount of service mileage provided, the service may not be adequately addressing the needs of passengers. The average fleet age has improved since 2017, which indicates a proactive and balanced vehicle replacement schedule.
- **Efficiency Measures:** Efficiency measures have improved moving away from the pandemic period. Operators' salaries saw an increase during the pandemic, yet this has not caused most of the efficiency measures to decline. The operating expense per passenger trip remains in decline, the result of the drop in passenger trips exceeding the decline in operating expenses over the trend period. Revenue miles per vehicle mile remained stable during the five-year period, indicating that MCAT continues to control its operational deadhead.

The full results of the trend analysis can be found in Appendix C.

Peer Review Analysis

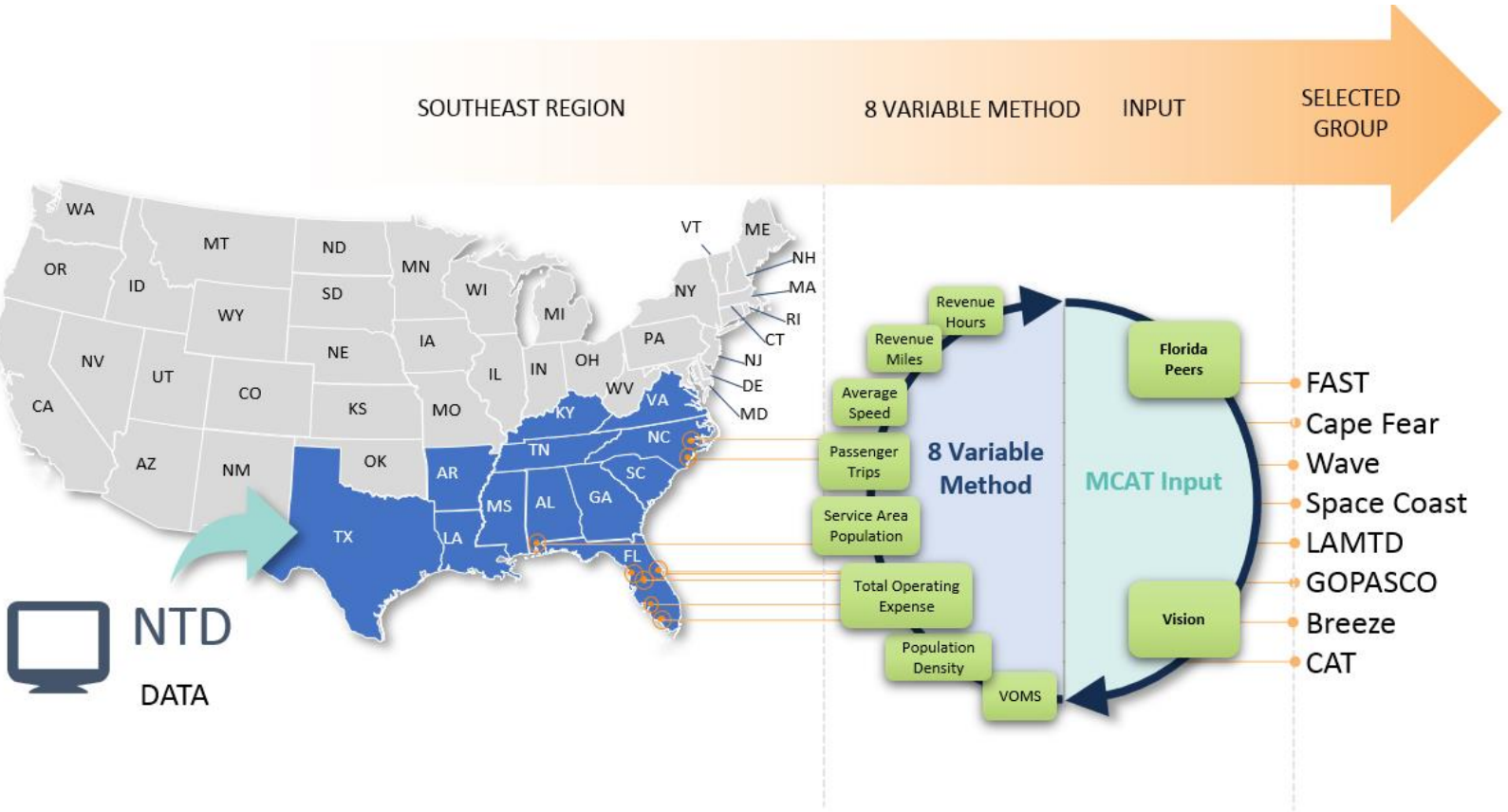
In addition to the trend analysis presented previously, a peer system review was also conducted to assess how MCAT compares to similar peer transit agencies. The peer review analysis, when combined with the trend analysis of an overall transit performance evaluation, provides an excellent starting point for understanding the efficiency and effectiveness of a transit system.

The selection process for the peer system review is described first, followed by a presentation of highlights from the peer review analyses involving the same key performance indicators as used in the trend analysis. Summary results are provided at the conclusion of this section.

Peer System Selection Methodology

Shown in Figure 3-6, peer agencies were selected from the entire US pool of transit agencies. The first step was a geographic screening process. The peers were narrowed down based on geographic location from southeastern states such as Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Texas, and Virginia.

Figure 3-6: Peer Selection Methodology



Fixed-route systems operating in these states were added to the pool of possible peers and were analyzed based on eight NTD criteria:

- Revenue hours
- Revenue miles
- Average speed
- Passenger trips
- Service area population
- Total operating expense
- Population density
- Vehicles operated in maximum service (VOMS)

A potential peer received 1.0 point when one of the eight criteria was within one standard deviation of MCAT's performance value. A peer received 0.5 points for each criterion that fell within two standard deviations of MCAT's value. The initial set of peers selected using this methodology was presented to MCAT staff for review and revisions, where a special emphasis on Florida peers was added to the selection process. Table 3-4 shows the final set of selected peer systems for the peer system review analysis.

Table 3-4: Selected Peer Systems for MCAT Peer Review Analysis

Agency Name	Location
Collier Area Transit (CAT)	Collier County, FL
Fayetteville Area System of Transit (FAST)	Cumberland County, NC
Lakeland Area Mass Transit District (LAMTD)	Polk County, FL
Pasco County Public Transportation (GOPASCO)	Pasco County, FL
Breeze Transit (Previously SCAT)	Sarasota County, FL
Space Coast Area Transit	Brevard County, FL
The Wave Transit System (Wave)	Mobile County, AL
Cape Fear Public Transportation Authority	Wilmington, NC

Source: FTIS, MCAT

Peer Analysis Summary

The results of the peer analysis are presented in Table 3-5. It shows the findings by key indicators and measures in terms of their deviation above or below the peer group mean and a general assessment of the result. The general assessment can indicate whether the service metric is currently good in relation to peers, or if it can improve based on peer metrics. Some metrics are not applicable for assessment as they are particular to what the system is able to offer, such as the revenue miles and hours provided by the system.

Table 3-5: Fixed-Route Peer Review Analysis, 2021

Indicator/Measure	MCAT % from Peer Mean	Assessment
General Indicators		
Passenger Trips	19.1%	-
Revenue Miles	-6.5%	-
Revenue Hours	-1.2%	-
Total Operating Expense	14.9%	-
Vehicles Operated in Maximum Service	-15.2%	-
Total Employee FTEs	34.4%	-
Effectiveness Measures		
Passenger Trips per Revenue Mile	35.5%	Good
Passenger Trips per Revenue Hour	26.0%	Good
Average Age of Fleet (in years)	18.1%	Can Improve
Efficiency Measures		
Operating Expense per Passenger Trip	-23.2%	Good
Operating Expense per Revenue Mile	33.5%	Can Improve
Operating Expense per Revenue Hour	20.0%	Can Improve

Source: NTD FTIS

- **General Performance Indicators** – MCAT provides a similar level of service to that of its peers, but the agency has a higher number of trips for that similar level of service than its peers. This indicates that MCAT has been capturing a greater level of demand than its peers. Additionally, operating expenses at MCAT are almost 15% higher than the peer average, which, despite offering similar revenue hours to most of its peers, MCAT may have local conditions that are impacting its spending for operations.
- **Effectiveness Measures** – MCAT has been effective in matching services to its current level of demand compared to its peers, achieving above average numbers of passenger trips per revenue miles and hours. The age of MCAT's fleet is higher than its peers, suggesting that it may be more susceptible to higher costs in vehicle replacement, as well as less reliable service, which could affect other service effectiveness measures in the future.
- **Efficiency Measures** – MCAT's operating expenses for most metrics are higher than its peers, which could lead to potential financial shortfalls. These numbers may be hyperinflated due to the numerous measures taken to protect public health during the COVID-19 pandemic. The operating expense per passenger trip is much lower than its peers, indicating a good match of costs per passenger trip. However, MCAT's expense per revenue mile and revenue hour are much higher than the peer averages, indicating potential inefficiencies in the system compared to its peers who may have shorter service hours, smaller service areas, or some other mitigating factors.

The full results of the peer analysis can be found in Appendix C.

Paratransit Performance Evaluation

In addition to evaluating MCAT's fixed-route services, an evaluation of ADA paratransit services provided by MCAT is also included. The Handy Bus is a paratransit service provided to ADA eligible clients within the service area as required by Federal Transit Administration (FTA) grant recipients. MCAT also provides paratransit trips to TD clients. Handy Bus statistics provided in Table 3-6 include both ADA and TD paratransit trips.

ADA Paratransit Service Trends

This section includes a five-year review of selected indicators at the system level for MCAT's Handy Bus service. Table 3-6 shows the trend statistics for Handy Bus performance indicators.

Table 3-6: Paratransit Trend Analysis, 2017-2021

	2017	2018	2019	2020	2021	% Change (2017-2021)	Status	Desired Trend
General Indicators								
Passenger Trips	100,904	97,528	98,763	66,421	62,413	-38.15%	↘	↗
Vehicle Miles	762,505	826,241	841,768	609,234	595,183	-21.94%	↘	-
Revenue Miles	620,758	647,443	640,251	461,575	457,459	-26.31%	↘	-
Revenue Hours	44,262	49,088	52,083	40,203	38,542	-12.92%	↘	-
Total Operating Expense	$3,372,748	$4,148,856	$4,543,619	$4,543,221	$4,583,679	35.9%	↗	-
Vehicles Operated in Max Service	22	22	25	27	21	-4.55%	↘	-
Effectiveness Measures								
Passenger Trips per Revenue Mile	0.16	0.15	0.15	0.14	0.14	-16.07%	↘	↗
Passenger Trips per Revenue Hour	2.28	1.99	1.9	1.65	1.62	-28.97	↘	↗
Average Age of Fleet (in Years)	4.4	4.57	4.16	4.2	4.47	1.52%	↗	↘
Efficiency Measures								
Operating Expense per Passenger Trip	$33.43	$42.54	$46.01	$68.40	$73.44	119.72%	↗	↘
Operating Expense per Revenue Mile	$5.43	$6.41	$7.10	$9.84	$10.02	84.42%	↗	↘
Operating Expense per Revenue Hour	$76.20	$84.52	$87.24	$113.01	$118.93	56.07%	↗	↘

Source: NTD FTIS

Summary Results of MCAT Handy Bus Trend Analysis

- **General Indicators:** Passenger trips decreased by almost a third in the observed time period, which is due in large part to the COVID-19 pandemic. A steady trend in the number of passenger trips was observable prior to the pandemic's onset, with passengers making use of the Handy Bus consistently throughout. The pandemic situation created challenging service conditions, resulting in a decrease in revenue miles and hours, which had been steady up to that point. A significant increase in operational expenses was observed as trending upward within this timeframe. While inflation is likely a key factor in the increase of operating expenses, such a larger-than-average increase should be evaluated further to understand what other factors may have contributed to the increase.

- **Effectiveness Measures:** The decrease in passenger trips per mile and hour is relatively marginal since paratransit services are known to not operate at full or even half capacity. Despite the pandemic's strain on services, it seems that the decrease in this area is not significant and demonstrates that the service was able to perform near the level of demand. An increasing average fleet age can translate to more expensive vehicle replacements and less sustainable replacement periods, with larger amounts of the budget being dedicated to replacing vehicles.

- **Efficiency Measures:** Operating expenses increased significantly within the observed timeframe, with the cost of operations per passenger trip increasing 119% from 2017 to 2021, with the single largest increase occurring between 2019 and 2020. This increase can be attributed to the increase in supplies needed and sanitizing measures that were required during the pandemic. In the post-pandemic period, it will be critical to evaluate the various operating expense components in order to reduce the overall financial burden of this service and deter any problematic future financial shortfalls.

4.0 Public Involvement Summary

Conducting public outreach during Manatee County Area Transit's (MCAT) 10-year Transit Development Plan (TDP) update is foundational in assessing the importance and utilization of public transportation in Manatee County. Providing the community with the opportunity to give feedback on their perception of MCAT's services is a way to help guide this TDP and align it with the local community's vision for personal mobility. This section summarizes the public outreach efforts undertaken during the TDP process and the associated findings.

Public Involvement Plan

The Public Involvement Plan (PIP) was the cornerstone of public outreach for the TDP, outlining community outreach opportunities throughout the county. The PIP described the various outreach efforts to be undertaken throughout the TDP process, including the public at large, agency personnel, local policy leaders, and stakeholders representing various local agencies and organizations.

The PIP was prepared and submitted in 2022 to FDOT, who reviewed and approved it prior to the implementation of any outreach activity. The PIP document can be found in Appendix D.

To encompass a wide range of community stakeholders and to engage them in the public involvement process, two main techniques were employed.

- *Direct involvement* included activities that allow engagement with the public and stakeholders directly, including public workshops, stakeholder interviews, small group discussions, transit rider and non-rider surveys, and presentations directed to elected officials and other interested parties.
- *Indirect involvement* included information and educational materials that provided details and project information to the public and stakeholders through email communications, social media outreach, website content, and media statements.

Advisory Review Committee

To ensure the project adheres to local objectives and needs, an Advisory Review Committee (ARC) was established to assist the project and consultant teams with reviewing and providing comments on all major TDP deliverables. In addition to the Project Team (MCAT staff and consultant), staff from the local Workforce Development Board (CareerSource Suncoast), FDOT District 1 staff, and MPO staff, were invited to participate in the ARC to provide input throughout the study and evaluate deliverables.

Key coordination activities completed include the following:

- **TDP Progress Meetings** – Two ARC meetings were held in December 2022 and April 2023 to review and discuss the TDP progress and obtain input and direction from the ARC. These meetings included discussions about key findings from data analyses and public outreach and a discussion to help identify 10-year TDP needs.
- **Coordination Emails** – The project team also coordinated with ARC members via email to update them on the TDP and share material throughout the project timeline.

Public Outreach Activities

The remainder of this section summarizes the various outreach activities conducted during the public involvement process as outlined in the PIP. Copies of the materials developed for these activities are included in Appendix E.

The public outreach process involved transit riders and non-riders, stakeholders, policy leaders, and agency personnel, and included activities such as online surveys, in-person public workshops, and interviews with local stakeholders. Overall, more than 1,700 people were engaged in this process through TDP-specific activities.

Figure 4-1: Public Outreach Activities Summary

On-board Survey

An on-board survey of MCAT's fixed route bus patrons was conducted to identify demographic information, attitudes, preferences, and perceptions of current transit riders. To allow for a sufficient sample size with valid responses that will support statistical rigor of the results, yet support efficient use of agency resources, survey efforts covered up to 50% of MCAT's fixed routes. The on-board survey planning and collection was coordinated closely with MCAT staff to ensure the study objectives were met and data collection was efficiently integrated with agency operations. The survey was conducted over a two-week span in October 2022 and yielded a total of 1,493 surveys, which surpassed the original goal of 1,000 surveys.

Results collected from the on-board survey prove to be useful in providing insight into the characteristics and perspective of transit riders and to further understand how transit riders utilize MCAT's services. Conclusions formed from analyzing the on-board survey are summarized below. The full survey summary can be found in Appendix E.

- MCAT's fixed-route services earned a high ranking in terms of customer satisfaction, receiving a weighted average of 4.4 out of 5.
- The implementation of MCAT's mobile application, MyStop, has provided a significant benefit to transit riders and has become widely used since being launched.

- Most riders (90%) indicated that they would further utilize MCAT services if they were free, suggesting fare cost as a limitation to ridership. Additionally, 86% of respondents indicated a household income below $50,000, showing that more than three-quarters of transit riders being below the median household income for Manatee County.
- Passengers agreed that improving the headways to 30-minutes, expanding Sunday service on routes, and extending weekday evening service were the most critical improvements.
- Significant attention was placed on Route 99 and Route 3 for implementing Sunday services.

Online Public Survey

The TDP online public survey was available in February and March of 2023 and had 16 questions total, featuring questions about demographics, ridership information, and service improvements. The goal of the survey was to gather public feedback about how MCAT services are perceived by the public, how services can be improved, and what services improvements would make non-riders more likely to start using the bus system. The survey had 246 respondents.

Results collected from the online survey are useful in providing insight into the non-rider perspective. Conclusions formed from analyzing the on-board survey are summarized below. The full survey summary can be found in Appendix E.

- Survey respondents agreed that the top three service improvements that would make transit more appealing are to increase frequency to 30-minutes, provide later evening service, and implement new services.
- Desired new services include new routes to Parrish and Lakewood Ranch, more Sarasota connections, and dedicated and quick service to Anna Maria Island.
- Respondents indicated that most of them would use mobility-on-demand services if they were offered, depending on the location of services and the cost.
- A majority of respondents were also interested in a ferry/water taxi service to Anna Maria Island.

Stakeholder Interviews

Receiving input that reflects local conditions is critical in forging a TDP and the inclusion of community leaders and decision-makers should be accounted for throughout the public involvement process. To achieve this, 17 stakeholders representing various entities, such as County Commissioners, other Manatee County staff, and city leaders were contacted for interviews and 5 agreed to participate. The following lists the questions that were asked during the stakeholder interviews:

Where are we today?

In general, interviewees expressed positivity toward MCAT and indicated support for the role of transit within the community.

- **Awareness** – Interviewees indicated that there is significant awareness and support for transit in the community.
- **Perception** – The role of transit in the community was viewed primarily as helping older adults and low-income individuals, but the public has a different perception of transit than prior to the fare-free policy established in November 2022. The prevailing perception

is that cars are catered to in Manatee County and things need to change systematically in order to make transit successful.

- **Accessible Information** – All interview subjects believe that information about MCAT services is readily available in the community.
- **Responsiveness** – Consensus was that MCAT is as responsive to community needs as funding allows, but that financial support hinders providing more for the community in the form of more frequent buses and other improvements to existing services.

Where do we want to go?

- **Transit Vision** – The consensus among those interviewed was that the vision for public transit in the community was to make transit more desirable, reduce wait times, reduce traffic, and gain transit ridership by promoting transit and improving perception of transit services.
- **Regional Transit Connections** – Interviewees agreed that regional connections to Sarasota and Pinellas counties are adequate.
- **Impacts of Continued Growth** – Interviewees indicated that the County is developing faster in some areas than infrastructure improvements can be provided. As an increasing number of new residents are moving into the county, it is important to address the needs of the communities experiencing this growth, such as Lakewood Ranch to the east and the Parrish/Ellenton area to the north. Traffic to Anna Maria Island also continues to be a major issue during peak tourism times.
- **Premium Service Types** – Interviewees advocated for increasing coverage of transit services using first/last-mile connections and enhancing mobility-on-demand services for riders outside existing service areas.

How do we get there?

- **Focus for the Next 10 Years** – The most prominent suggestions were that implementing new services in underserved areas and implementing improvements to existing routes (i.e., shortening wait times and extending service hours) are the most important factors.
- **Increased Service Connections** – Lakewood Ranch was mentioned as an area of the county believed to be underserved. Another area of concern was alleviating the traffic to Anna Maria Island for residents and visitors.
- **Constraints** – Interviewees all indicated that significant change is not expected without a bigger commitment to funding within the community. Funding was the only perceived barrier, with no indication of potential issues otherwise such as in policy or practice.

Public Workshops

Five pop-up workshops took place across Manatee County in January and February 2023, to further provide an opportunity for residents to learn more about the TDP and provide input on service improvements. The primary purpose of the pop-up workshop events is to educate participants about the TDP process and collect comments and input on gaps in the transit system and unmet mobility needs. Pop-up events took place at the Downtown Transfer Station, the DeSoto Transfer Station, the Anna Maria City Pier, Manatee County Public Beach, and Red Barn Flea Market. Each workshop lasted around two hours. The general public was able to ask questions and discuss what the TDP process involved and what transit means to them. They were also provided the opportunity to take the online public survey. An accurate number of workshop participants cannot be determined, but it is estimated that more than 100 people were engaged during this effort.

Discussion Group Workshop

The discussion group workshop took place on May 8, 2023, where members of the MPO's Citizens Advisory Committee (CAC) were asked to participate in a discussion exercise. Committee members were presented with an overview of the TDP before the discussion took place. The overview included information about the TDP, information regarding baseline conditions, existing service and trends, and a summary of public outreach. The discussion exercise was facilitated by presenting CAC members with the following question: Which are the most important service improvements that would make MCAT better for you and people in your community to use? This was followed by an open discussion that allowed for other comments.

Members of the CAC asked questions and made comments that suggested an interest in providing service in areas that are affluent in Manatee County for employees in those areas that may need the services, as well as understanding peak hour services and potential improvements. Other comments suggested attention to regional travel to places like Sarasota and Venice. Finally, comments also suggested a better understanding of mobility-on-demand services and gauging their success, particularly with transportation disadvantaged populations. Traffic was identified as the largest obstacle to improved mobility in the county, particularly on Longboat Key and the beaches.

Bus Operator Interviews/Survey

Bus operators provide key insight into the daily operation of transit services because they have frequent, first-hand interactions with riders, while at the same time working closely with transit dispatchers and operations management teams. Their input is valuable as they can speak from the agency's perspective as well as from the rider's perspective. In February 2023, bus operators were asked to participate in interviews to gauge their opinions regarding existing transit services and operations, future improvements, general safety, and ridership

interactions and perception. Bus operators who were not able to participate in interviews were given the opportunity to take a survey.

The following is a summary of responses to the questions asked to bus operators.

- **Concerns frequently expressed by riders** – Operators suggested that one of the major complaints presented by riders is that buses are often late, leading to missed transfers. Additionally, some riders complained about comfort on buses, while others observed that riders do not feel safe, especially at the Downtown Station.
- **Safety/operating issues** – Operators were noted as sharing that riders often do not hail the buses correctly, by not properly signaling buses to stop. The lack of anticipation for a bus to stop can lead to safety issues if buses do not stop within an adequate distance from the bus stop when riders are present.
- **Service improvements** – Operators suggested the implementation of AM peak and PM peak express trips on Route 99. Additionally, operators suggested that Routes 3 and 9 remain with a broken alignment all year.
- **Other comments** – Operators provided multiple comments that would help improve MCAT services. On the operator side, there were comments about improving functionality of AVAIL screens, and that buses have a hard time seeing traffic pulling out of the Walmart on US 301, citing that buses often have to pull out over the crosswalk to see the right of way. Additionally, operators suggested that scheduled times be adjusted whenever traffic detours are expected. From the rider's side, operators suggested that added bike-carrying capacity should be considered, as well as improved frequency and Sunday service.

Social Media

Manatee County operates and maintains social media accounts on Facebook, Instagram, Twitter, and Nextdoor to engage with residents and visitors on community matters, including public transit. Through Manatee County's social media pages, TDP-specific information was advertised to provide the public with updates on the TDP, including information about outreach opportunities. The posts also featured a QR code to direct the public to the online public survey.

5.0 Situation Appraisal

The TDP is a strategic planning document that includes an appraisal of factors within and outside MCAT's service area that affect the provision of transit services. Conducting a situation appraisal is a key requirement under the TDP Rule and helps the transit agency examine the strengths and weaknesses of the system, as well as any existing/potential threats and opportunities for the services it provides.

The following sections synthesize the previous efforts in the TDP to develop an assessment of the full operating environment for MCAT. This assessment serves as the basis for the formulation of MCAT's future goals and objectives.

A review of local, regional, and State plans was conducted to ensure consistency between the 10-year plan goals and initiatives with other government policies and planning efforts. The current overall planning and policy environment within the county was reviewed to better understand the transit needs; included are reviews of existing socioeconomic trends, travel behavior and trends, land uses, transit-friendly urban design, community feedback, organizational structure, technologies and innovation, funding, and regional coordination.

Plans Review

At the local and regional levels, several agencies/organizations conduct studies to produce plans and policies for addressing local and regional transportation issues and intermodalism that may impact MCAT services. Various Federal and State plans and regulations also may impact the provision of transit services. This plans review helps MCAT understand and support the pursuit of relevant local and regional goals while pursuing its own goal of creating a viable and accessible transit system in and around Manatee County.

Relevant transportation planning and programming documents are summarized, with an emphasis on issues having implications for MCAT. The list of local, regional, State, and Federal plans and studies reviewed to understand current transit policies and trends with potential implications for MCAT service are shown in Table 5-1. Information gathered from the review can be found in Tables 5-2 and 5-3.

Table 5-1: Local, Regional, State & Federal Plans Reviewed

Local Plans	
✓ Manatee County Comprehensive Plan	✓ How Will We Grow - Vision Plan
✓ Bradenton Comprehensive Plan	✓ Manatee County Public Works Standards - Complete Streets
✓ Downtown Mobility Study	✓ MCAT Transportation Disadvantaged Service Plan (TDSP)
✓ Palmetto Comprehensive Plan	✓ Central Manatee Network Alternatives Analysis
✓ Palmetto CRA Redevelopment Plan	✓ Sarasota/Manatee MPO Congestion Management Plan
✓ Bradenton Beach Comprehensive Plan	✓ US 301/41 Charrette Summary
✓ Holmes Beach Comprehensive Plan	✓ Sarasota/Manatee MPO Active Transportation Plan
✓ Bradenton Beach Scenic Highway Corridor Management Plan	✓ Sarasota/Manatee Transform 2045 LRTP Background Research Report
✓ Longboat Key Comprehensive Plan	✓ Sarasota Manatee Area Regional Transit (SMART) Connect Study
✓ MCAT TDP Major Update	✓ Sarasota /Manatee Transform 2045 LRTP
✓ 2022 MCAT TDP Annual Progress Report	✓ US 41 Multi-Modal Emphasis Corridor
✓ SCAT Fixed Route Optimization Study	✓ Sarasota/Manatee Barrier Islands Traffic Study
✓ MCAT MOD Feasibility Study	✓ SCAT TDP Major Update
Regional, State, & Federal Plans	
✓ Envision 2030: The Future of Transit in Tampa Bay	✓ FDOT Complete Streets Implementation Update: Handbook and Design Manual
✓ Envision 2030 Annual Progress Report	✓ Florida Transportation Plan
✓ TBARTA Transit Vision Plan	✓ Bipartisan Infrastructure Law
✓ State of Florida Transportation Disadvantaged 5-Year/20-Year Plan	✓ Implications to Public Transportation of Emerging Technologies
✓ Florida Transportation Plan: Horizon 2060	

Table 5-2: Local Plans and Programs

Plan Title	Geographic Applicability	Most Recent Update	Responsible Agency	Plan/Program Overview	Key Considerations/Implications for TDP
Manatee County Comprehensive Plan	Manatee County	2022	Manatee County	Planning document for Manatee County to guide development, land use decisions, preservation, transportation improvements.	• Contains element addressing public transit, alternative transportation, transportation disadvantaged, and paratransit directly. • Policy to coordinate transit with future needs of Port Manatee and Sarasota-Bradenton International Airport. • Policy for protection and acquisition of rights-of-way for transit. • Encourage transit as an alternate mode. • Coordinate with transit systems and alternative mode systems of neighboring counties and continue to expand between Manatee and Sarasota counties. • Expand transit service using the Transit Service Area Map as a guide. • Goals established to budget for reducing headways on US 41 and major east-west corridors. • Increase service frequency during rush hours, expand service hours, and BRT along US 41. • Goals established for paratransit service at 16.03 annual passenger miles per older adult and person with disabilities based on assumption that these populations are a constant 32.2% of total resident and seasonal population. • Establishes new goal (5.6) to provide a full range of transportation alternatives. • New objectives introduced to expand Transportation Concurrency Exception Areas within the Urban Service Area.
Bradenton Comprehensive Plan	Bradenton	2022	City of Bradenton	Planning document for City of Bradenton to guide development, land use decisions, preservation, transportation improvements.	• Policies and goals adopted to encourage TOD, transit stop pedestrian connections, and multimodal mobility improvements. • Support BRT options on Manatee Ave. to connect existing and future neighborhoods to downtown. • Provide and fund a mass transit service at a level of 9.81 annual passenger miles per capita identified, with 1 stop every 0.25 miles, 1 shelter every 1.5 miles. • Identifies LOS standard for demand-response paratransit system at 16.03 annual passenger miles per transportation disadvantaged (TD) individual. Total population of TD individuals also established at assumed 32.2 % of the total resident and seasonal population. • Establishes desire by City of Bradenton for increased frequency of service, additional routes, extended hours of operation, Sunday service, direct routes, and satellite parking in downtown Bradenton.
Downtown Mobility Study	Bradenton & Palmetto	2010	Sarasota/ Manatee MPO	Outlines list of recommended projects to improve transportation to, from, and between downtown Bradenton and Palmetto.	• Emphasizes importance of pursuing TOD, as advocated in House Bill 697 (applies to comprehensive plans), intends to espouse tools and policies outlined in bill to support Local Government Comprehensive Plans. • Public outreach revealed consensus that availability and frequency of transit service in downtown areas must be substantially expanded to justify increases in future development intensity/density. • Overall evaluation of MCAT service is that ridership and presence are generally better in Palmetto than in Bradenton; adequate north-south and east-west connections but service relatively infrequent and not oriented toward downtown employment, residential, and cultural destinations. Also, limited-service hours (no Sunday or evening service) curtail potential ridership. • Recommends transit mall along 13th Street and downtown circulator network. • Final recommendation—downtown circulator service with high-frequency connections to employment, tourist, residential areas, and MCAT existing routes.
Palmetto Comprehensive Plan	Palmetto	2015	City of Palmetto	Planning document for City of Palmetto to guide development, land use decisions, transportation improvements.	• Establishes goal of encouraging downtown commercial infrastructure such as transit stop and shelter improvements; encourages adoption of Complete Streets in downtown commercial areas. • Establishes goal for City to continue to coordinate transportation planning activities with plans and programs of any entities, provide transit information at all public buildings to increase annual transit trips per capita. • Supports multimodal transportation to reduce greenhouse gas emissions by developing land use plans and policies that encourage mixed uses, pedestrian-oriented multimodal site design, and higher densities and intensities in areas served by transit.
Palmetto CRA Redevelopment Plan	Palmetto	2022	Palmetto CRA	Planning document establishing goals/ objectives for CRA area, guidelines for working with local entities.	• Explains that the CRA can assist the City of Palmetto in the installation, construction, and reconstruction of multimodal corridors including transit. • The agency may include forms of multimodal transportation including transit shelter/stop improvements that may include shelters, benches, lighting, ITS, and branding. • The agency may develop a streetscape that includes major transit infrastructure such as dedicated transit lanes, signal prioritization, queue jumping, and vehicles.

Table 5-2: Local Plans and Programs (continued)

Plan Title	Geographic Applicability	Most Recent Update	Responsible Agency	Plan/Program Overview	Key Considerations/Implications for TDP
Bradenton Beach Comprehensive Plan	Bradenton Beach	2020	City of Bradenton Beach	Planning document for City of Bradenton Beach to guide development, land use decisions, transportation improvements.	• Requests that City provide combination of requirements for local streets and Gulf Drive to address traffic calming, reduce negative effects of motor vehicle use, increase safety conditions for pedestrians and bicycle use, promote increased transit, and provide for street landscaping. • In pursuit of safety, aesthetics, and encouraging multimodal transportation options, establishes goal of providing bicycle and pedestrian ways for connecting residential areas to recreation areas, schools, shopping areas, and transit terminal areas.
Holmes Beach Comprehensive Plan	Holmes Beach	2022	City of Holmes Beach	Planning document for City of Holmes Beach to guide future land use and transportation decisions.	• Establishes policy to support alternate modes of transportation by encouraging developments to include transit friendly design features. • Establishes policy to support transit through development site plan review to include pedestrian facilities in new development and redevelopment projects. • Establishment of a program that identifies improvements to MCAT stops. • Objective to continue to support MCAT to increase the use of mass transit. • Ensure that Route 3, the Beach Express, and the Anna Maria Island Trolley continue to serve the residents and investigate improved transit routes. • Monitor ability to connect key generators and attractors with transit. • Expansion of the Anna Maria Island Trolley to loop on Marina Way to provide service to West Bay Point and The Moorings. • Continue to support improvements to the mass transit system, including the provision of a dedicated lane on Manatee Avenue.
Bradenton Beach Scenic Highway Corridor Management Plan Update – SR 789 / Gulf Dr	Bradenton Beach	2009	City of Bradenton Beach	Preserve and enhance the corridor's existing natural, historical, scenic, and social resources that characterize the City of Bradenton Beach's quality of life.	• Extending the hours of trolley and bus operation later at night would make public transit more appealing to service employees and patrons. • Pursue alternate modes of transportation to alleviate automobile congestion. • Transit stops that maximize connectivity with Bradenton Beach businesses.
Longboat Key Comprehensive Plan	Longboat Key	2007	Town of Longboat Key	Planning document to guide development through future years for town, influence land use decisions, transportation policy.	• Outlines the goal of providing multimodal transportation system, with support for developing alternative means of transportation. • Goal of coordinating with Manatee and Sarasota transit agencies established.
2022 MCAT TDP Annual Progress Report	Manatee County	2022	MCAT	Annual progress update for policies, objectives, projects outlined in 2018 TDP.	• Includes analysis of accomplishments for period and update to financial plan. • Major accomplishments include implementation of Computer-Aided Dispatch/Automatic Vehicle Location (CAD/AVL) system; upgrading the MCAT website to be ADA compliant; increased frequencies on Routes 2, 6, and 99; development of new MOD pilot project for eastern Manatee County; and securing funding for enhanced transit transfer center near SRQ for MCAT and SCAT (Breeze Transit).
MCAT TDP Major Update	Manatee County	2018	MCAT	Strategic assessment and planning document for MCAT transit service. Represents the transit agency's vision for public transportation in its service area. Last major TDP update, serves as guide for fixed-route system and complementary ADA service over next 10 years.	• Outlines status and performance of system and needs as of 2018. • Operational priorities include improving frequency of on selected routes, add peak hour service to St. Petersburg, enhance frequency on key connector routes (Routes 2 and 8), extending service hours on existing routes to 10:00PM, implement Sunday service on select routes, and microtransit. • Proposes enhanced frequencies on Route 99, which provides service between Manatee and Sarasota counties along US 41. • Ensures that MCAT representatives will review and attend local and regional economic development, land use planning, and transportation planning meetings at which major development along existing transit corridors will be reviewed/discussed. • Highlights continued coordination with other transportation agencies regarding improving system-to-system connectivity. • Includes 10-year TDP financial plan.
MCAT MOD Feasibility Study	Manatee County		MCAT	Determine the feasibility of developing and implementing MOD in Manatee County.	Proposes MOD zones with Monday through Saturday service in the following areas: • Ellenton/Parrish • Lakewood Ranch North/South • Lakewood Ranch South UTC • US 301 • Samoset • West Bradenton

SCAT Fixed-Route Optimization Study	Sarasota County	2020	SCAT, operating as Breeze Transit	Planning document that identifies improvements in productivity and increase efficiency in transit operations.	• Proposes changes to Route 2, which serves University Parkway on the border of Manatee and Sarasota counties. • Proposes changes to Route 8. This route would no longer connect to Manatee County. • Proposes an MOD zone on Longboat Key. • Recommends eliminating Route 30, which connects the airport, University Parkway, and Lakewood Ranch.
SCAT TDP Major Update	Sarasota County	2019	SCAT, operating as Breeze Transit	Represents the transit agency's vision for public transportation in its service area.	The County's TDP sets a 10-year strategy for implementing community transit goals, along with an assessment of transit needs in the service area. The Sarasota County TDP addresses fixed-route, paratransit, and commuter assistance services and includes a 10-year capital and operating plan for these transit services and improvements. Alternatives and improvements that have implications for this study include: • New intercounty connectivity area near the US 41 corridor between Manatee and Sarasota Counties • Add Lakewood Ranch as a new service area
How Will We Grow – Vision Plan	Manatee County	2013	Manatee County	Outlines scenarios for changing county growth policy to accommodate changing demands, funding levels, demographic trends, and projected growth.	• Alternative 1 includes transit-oriented development. • Each scenario outlines transit planning principles and has a heavy emphasis placed on growth around Tamiami Trail / US 41. • Scenario 3, if recommended by BOCC as preferred strategy for growth management, will require revisions to comprehensive plan and land development code. • Recommends focusing future development into four activity centers, with transit hubs centered on these nodes and premium services linking each activity center. Activity center boundaries are not established, but are in areas of US 41 corridor, Lakewood Ranch, Parrish, Port Manatee. • All activity centers served by transit/public transportation to be successful. • In Scenario 3, Lakewood Ranch, Parrish, and Port Manatee become nodes in addition to development already concentrated around US 41.
Manatee County Public Works Standards – Complete Streets	Manatee County	2016	Manatee County Public Works Department, Manatee County BOCC	Draft of public works policy and ongoing progress aimed at guiding future roadway conditions of county to ensure health, safety, mobility for all users.	• Describes Complete Streets as a comprehensive, integrated transportation network with infrastructure and design that allow safe and convenient travel along and across streets for all users, including pedestrians, bicyclists, persons with disabilities, motorists, movers of commercial goods, users and operators of public transportation, seniors, children, youth, and families. • Local streets can serve as parallel bicycle or transit routes to heavier traveled streets. • Consider the establishment of minimum density requirements within the urban core area, in association with planning efforts for increased mobility through greater street connectivity and transit services. • New section to Manatee County Public Works Standards' DRAFT Highway and Traffic Standards Manual added and outlines intent to incrementally grow and develop extensive networks of Complete Streets. Projects may be implemented as part of developer-driven project or as part of County-initiated capital improvement project for roadway improvement or new road construction. • Policy draft requires that Complete Streets consider all current and planned public transportation service during design and provides series of recommendations on how to integrate services depending on roadway context. • No specific corridors are identified or discussed as part of the new Standards Manual.
MCAT TDSP	Manatee County	2021	MCAT	Strategic assessment and planning document for MCAT paratransit service.	• Outlines status and performance of system and needs as of FY 2020. • Some trends and needs observed related to rising operational costs are not associated with increased service levels but rather increased operational costs including an increase in VMT and overall operational costs. • To meet Manatee County's Comprehensive Plan paratransit service goal of 16.03 annual passenger miles per older adult and person with disability, need to increase annual passenger miles per elderly and disabled persons. • Trips on the Handy Bus continue to increase (24% over a five-year period). • Lack of transit on the east side of the county is a need and a barrier to coordination.
Central Manatee Network Alternatives Analysis	Manatee County	2019	FDOT, Manatee County, Sarasota/ Manatee MPO, Cities of Bradenton and Palmetto	Study seeks to define projects that support mobility, safety, economic development, and quality of life goals in study area.	• Final recommendations include focus on expanded capacity and service provided on Route 99, plan and design for expansion of the downtown Bradenton Transit Center, evaluate and implement on demand service for Route 13, and continue to address ADA gaps. • Need for transit service east of US 41/301. • Considering options for widening the bridges, need to replace the DeSoto Bridge, constructing a bridge across the Manatee River, incorporating multimodal transportation facilities into all concepts that could address the transportation needs of the study area. • Alternative Corridor Evaluation (ACE) study underway.

Sarasota/Manatee MPO CongestiFon Management Plan	Manatee and Sarasota Counties	2020	Sarasota/ Manatee MPO	Provide the information needed to make informed decisions regarding the allocation of financial resources to manage current and future congestion.	• Trends in LOTTR, vehicle crashes, and person hours of delay continue to present challenges to mobility and safety in metropolitan area. • Strategies include bus on shoulder (US 41, and possibly I-75), alternative lane use, and managed lanes.
US 301/41 Charrette Summary	Manatee and Sarasota Counties	2012	Sarasota/ Manatee MPO	Provides public input focusing on strategic objectives for US 301/41.	• Discussion about the addition of one or more park-and-ride lots in Palmetto with express or priority transit service along US 301 to employment and retail destinations to the south. • Initiating transit service and facility improvements in the corridor to encourage more potential riders to use transit as an alternative to driving. • Fix the Palmetto 10th Street interchange and add park-and-ride lots for transit.
Sarasota/ Manatee MPO Active Transportation Plan	Manatee and Sarasota Counties	2019	Sarasota/ Manatee MPO	Assesses the current state of bicycle and pedestrian infrastructure and identifies gaps in facilities connecting to and from transit and other destinations.	• Improve safety for all modes, improve multimodal mobility, improve community health, and spur economic development. • Improve the number of transit trips in the region. • The areas northwest of Manatee Avenue/SR 64 are not being served by transit routes and are predominantly made up of suburban residential developments. • The Plan aims to support the connections between non-motorized and public transit modes. • This area experiences high peak season variation, particularly with routes serving the beaches.
Sarasota/ Manatee Transform 2045 LRTP Background Research Report	Manatee and Sarasota Counties	2019	Sarasota/ Manatee MPO	Provides an overview of factors that may potentially affect population allocation and job growth in Sarasota and Manatee Counties through 2045.	• Growth has recently occurred and may continue in/around areas such as those east of I-75, Fort Hamer, Lakewood Ranch, North Port, Parrish, and Venice. • The Sarasota/Manatee area generally has an aging population, yet both retirement-age and working age populations are anticipated to be sizable in the future. Transportation needs for both these populations will be important in the future, including hazards planning and evacuation transportation that includes needs for aging populations and commuter transportation.
Sarasota Manatee Area Regional Transit (SMART) Connect Study	Manatee and Sarasota Counties	2013	TBARTA	Premium transit feasibility study to examine and evaluate potential premium transit options that would produce greater number of mobility options for northbound and southbound travel within the county.	• Developed viable options available to the public for comment. Some include commuter express services on I-75 from North Port Station to Palmetto Station, alternative commute option on Bee Ridge Road and Fruitville Road. Also considers BRT service from Airport/University Station to Bee Ridge Station and rapid connect BRT service from North Port Station to Palmetto Station via US 41. Next step includes agency collaboration so SMART Connect Viable Options could be implemented by 2035.
Sarasota/ Manatee Transform 2045 LRTP	Sarasota and Manatee Counties	2020	Sarasota/ Manatee MPO	Strategic planning document for meeting transportation needs of Sarasota and Manatee counties efficiently. Provides a framework of goals and objectives consistent with Federal and State requirements and local agency comprehensive plans.	• Goals/objectives outline priorities to improve transit safety, plan for efficient evacuations and safe returns, increase access to bus stops and transfer stations and availability of park-and-rides, ensure equity in all transportation decisions, expand connectivity in the regional network, and transit service connecting affordable housing with employment. • The vision map includes premium transit corridors along Fruitville Rd, University Parkway, Stickney Point Rd, and US 41. Also includes express transit service along I-75 from North Port to Palmetto. • Supports transit on multimodal corridors and actively supports the addition of multimodal facilities on all bridges with a special emphasis on Bus-on-Shoulder lanes for future micro and rapid transit. • Supports the community vision to preserve key corridors for future premium transit to connect urban centers and provide more transportation choices. • Key areas for transit to expand its footprint with support of public include the following services: fixed bus routes to the east and west of I-75; premium transit in centers and urban corridors; other public transit options besides buses.
US-41 Multi-Modal Emphasis Corridor	Manatee and Sarasota Counties	2020	Sarasota/ Manatee MPO	Establishes a set of guiding principles that represent the overall objectives of the multimodal corridor concept.	• Several potential project types, including dedicated transit lanes, signal priority, queue jumps, and transit vehicles. • Transit station/stop improvements: shelters, benches, lighting, branding, and ITS. • US 41/Tamiami Trail, Hillview St to Webber St – Transit stop and pedestrian crossing improvements. • Airport to 17th St SW – BRT corridor. • County Line to 26th Ave W – Transit service and amenities improvements.
Sarasota/ Manatee Barrier Islands Traffic Study	Manatee and Sarasota Counties	2019	FDOT District 1	Study to examine the feasibility of improving the overall traffic operations and circulation of motorized and non-motorized traffic on the Sarasota/Manatee Barrier Islands.	• North zone – Create transit priority to allow parking shuttles and transit vehicles to pass the queues along Cortez, and avoid the amount of traffic ignoring the right-turn only lane signage at 115th Street West. • North zone – allow buses to bypass any queues on the mainland, priority on Manatee Ave. • Connect mainland park-and-ride services with key destinations.

Table 5-3: Regional, State, and Federal Plans/Studies

Plan Title	Geographic Applicability	Most Recent Update	Responsible Agency	Plan/Program Overview	Key Considerations/Implications for TDP
Envision 2030: The Future of Transit in Tampa Bay	Districts 1 and 7	2020	TBARTA	Advance regional transportation needs in Hernando, Hillsborough, Manatee, Pasco, and Pinellas counties. Plan, fund, operate, and brand a regional transit system in this area.	• Acknowledges that growth in Tampa Bay region expected to grow 43% by 2040. • The number of residents aged 65 and older is projected to grow by 25%, increasing the potential transit-dependent population within the region. • Identifies regional and future priority projects supported by the cross-country travel occurs between Hillsborough, Pasco, and Pinellas counties. • The high-impact scenarios representing the highest-priority regional transit improvements include new/improved express bus service (Sun City Center to Bradenton), Regional Rapid Transit Phase 1, and regional rapid transit southern extension PD&E study. • Increase frequency of Route 99.
Envision 2030 Annual Progress Report	Districts 1 and 7	2021	TBARTA	Assesses the goals and objectives established by Envision 2030 based on the undertakings and accomplishments in FY 2021.	• MCAT experienced a marginal decrease in revenue miles, -1.3%, but this is attributed primarily to reduced service levels during the pandemic. From 2016 to 2020, MCAT's ridership declined -27.2%, which is consistent with general ridership trends for the agency. • TBARTA submitted a resolution in support of MCAT's grant application to improve service on Route 99, a short-term priority improvement in Envision 2030. • MCAT Skyway ConneXion assumed implementation FY 2023-2031.
TBARTA Transit Vision Plan	Districts 1 and 7	2015	TBARTA	Vision plan extending to 2040 that explores possibilities for regional fixed-guideway services, regional premium transit or express service, and regional commuter transit services.	• Regional transit service by 2040 and beyond includes: ○ Regional Fixed Guideway: service operating on rail or within dedicated transit lane. ○ Regional Premium Transit: BRT or express bus service in express lanes or water ferry (or similar). ○ Regional Commuter Transit: commuter express bus service (or similar).
State of Florida Transportation Disadvantaged 5-Year/20-Year Plan	Florida	2007	FCTD	Accomplish cost-effective, efficient, unduplicated, and cohesive TD services within its respective service area. Includes the explanation of the Florida Coordinated Transportation System, five-year report card, Florida Office of Program Policy Analysis and Government Accountability Review, and a strategic vision and goals, objectives, and measures.	• Develop and field-test model community transportation system for TD persons; create strategy for Florida CTD to support development of universal transportation system. • Long-range strategic vision includes developing a universal cost-effective transportation system with a uniform funding system and services that are designed and implemented regionally throughout the State.
Florida Transportation Plan: Horizon 2060	Florida	2015	FDOT	Requires, as part of Florida Statutes, pursuit to make Florida's economy more competitive, communities more livable. Looks at 50-year transportation planning horizon, calls for fundamental change in how and where State investments in transportation made.	• Supports development of State, regional, and local transit services through series of related goals and objectives, emphasizing new and innovative approaches by all modes to meet needs today and in future.
FDOT Complete Streets Implementation Update: Handbook and Design Manual	Florida	2018	FDOT	Developed to create alternative transportation systems to facilitate Complete Streets focused design.	• Revising guidance, standards, manuals, policies, and other documents. • Updating how decision-making is processed. • Modifying evaluation of performance. • Managing communication between agencies. • Updating training and education in agencies.

Florida Transportation Plan	Florida	2020	FDOT	Florida's long-range transportation plan, as required by State and Federal law.	Supports development of State, regional, and local transit services through series of related goals and objectives, emphasizing new and innovative approaches by all modes to meet needs today and in future. Most recent update emphasizes: • Safety and security for Florida's residents, visitors, and businesses. • Resilient and quality infrastructure. • Connected, efficient, and reliable mobility for people and freight. • Transportation choices that improve equity and accessibility. • Transportation solutions that strengthen Florida's economy. • Mobility solutions that enhance Florida's communities. • Transportation systems that enhance Florida's environment.
Bipartisan Infrastructure Law	USA	2021	117th US Congress	Provides funding for nation's surface transportation infrastructure, including transit systems and rail transportation network. Maintains strong commitment to safety.	Legislation will advance public transportation through safety, modernization, climate, and equity. • Includes $33.5 billion for transit capital and operating assistance in urbanized areas and $4.6 billion to support rural transit systems. • Funds dedicated to repairing and upgrading existing infrastructure, increasing accessibility, expanding service areas, upgrading buses to zero-emissions models. • Increases funding to meet transportation needs for older adults and people with disabilities. • Provides $12 billion in partnership grants for intercity rail service.
Implications to Public Transportation of Emerging Technologies	USA	2016	National	National Center for Transit Research	White paper that explores possible consequences for public transportation as result of introduction of new technologies such as autonomous vehicles, connected vehicles, and other innovations that impact efficiency, cost-effectiveness, and overall demand for transportation.

Situation Appraisal

Transit systems thrive in an environment when they address factors related to regulations, geography, environment, land use, development, community needs, etc., that can impact the delivery of their services.

To this end, a situation appraisal for MCAT was conducted to assess and document key aspects of the agency's operating environment based on information gathered for the TDP, including baseline conditions, public outreach, and local and regional plans.

Figure 5-1: Situation Appraisal Elements

Included in this section are assessments of the situation appraisal elements illustrated in Figure 5-1. The appraisal examines the strengths and weaknesses of the system, any existing barriers or threats to the provision of services in the county, and key opportunities for addressing those threats and/or enhancing the perception of transit within the operating environment.

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 by or may benefit from public transportation services. Major findings from an assessment of socioeconomic trends are summarized as follows:

- According to 2020 American Community Survey (ACS) data, Manatee County's population has increased approximately 49% to nearly 400,000 people since 2000. By 2035, Manatee County's population is projected to reach more than 510,000 residents.
- Currently, the 65 and older age cohort is the largest in Manatee County (28%). This age group will continue to grow, peaking at 33% in 2040, and will marginally decline to 32% by 2045.
- A third of the jobs located in Manatee County are in the educational services, health care and social assistance, and retail trade industries. The areas along US 41 south of the downtown area, Cortez Road corridor, and portions of Manatee Avenue are expected to increase in employment density in the coming decade.
- Although the annual income of 40% of Manatee County households is $75,000 or more, 27% earn $35,000 or less. The poverty rate has decreased from 14.3% in 2010 to 11.0% in 2020.
- Only 4% of households in Manatee County are zero-vehicle households. Approximately 82% of households own one or two vehicles.

- According to the Bradenton Area Convention and Visitors Bureau July 2022 Visitor Profile, nearly one million tourists visited Manatee County, generating a total economic impact of $1.43 billion. Although the number of tourists has significantly decreased since 2016 (-97.1%), the economic impact decreased slightly (-3.4%). Furthermore, the number of tourists increased (11.7%) with a significant economic impact from 2021 to 2022, an increase of 24.3%.

Implications

Since the population boom spurred by the pandemic, Manatee County has continued to grow in population and jobs, creating more demand for alternative modes of transportation, such as transit. As population continues to grow, the older adult population, which has a higher tendency to use transit, is projected to grow more rapidly and eventually compose one third of the population by 2040.

Furthermore, while nearly 40% of households have higher incomes ($75,000+ per year), there are still sizable segments of minorities and low-income households in the county. These demographic characteristics are typically considered to be more inclined to use public transportation, an indication of why Manatee County should continue to provide and improve transit for access to jobs and other services. While traditional riders should be a key focus for service, MCAT should also aim to attract more discretionary riders, or riders who have the choice of riding or driving their own vehicle. Key considerations for MCAT include enhancing mobility options and promoting more efficient use of commute times for these potential riders with high frequency and more direct routes, as well as enhanced marketing of existing and proposed services.

Due to increasing tourism, efficient and well-planned transportation is key so residents can live a quality life and visitors can enjoy their destinations. The visiting population adds more rental cars or other micromobility options, such as scooters, with drivers/users who have little familiarity with the travel environment, thus increasing traffic congestion and incidents. Adequate and convenient public transit service can help mitigate traffic congestion and parking demand while assisting visitors access their destinations more quickly.

Travel Behavior and Patterns

It is important to understand existing travel and commuting behaviors and patterns to determine possible impacts or benefits affecting public transit services. Some key findings are as follows:

- Although a majority of commuters in Manatee County continue to use their personal vehicles to commute (76.6%), the share has decreased slightly (-4.2%) from 2010 to 2020. Additionally, the share of those who worked from home nearly doubled in 10 years, from 4.9% to 8.9%.
- According to the ACS, 44% of transit users report being employed in the management, business, science, and arts industry. The vast majority of public transit users (60%) report leaving after 9:00AM, while 50% of those that report driving alone leave between 6:00AM and 8:00AM.

- Commute patterns show that residents from Sarasota, Hillsborough, and Pinellas Counties comprise approximately 25% of inflow and are approximately 38% of outflow to and from Manatee County.
- The unreliable road segments in Manatee County are mainly concentrated in west Manatee County. Although the majority of unreliable segments are not served by transit, the majority of the high traffic volume corridors (more than 30,000 vehicles per day) are served by transit.

Implications

MCAT has continued its efforts to improve services and has done so successfully with the available resources. The agency continues to operate a system that encourages residents and tourists to ride transit instead of using personal automobiles, especially by providing the service for free.

To attract more workers who live outside Manatee County to use transit, MCAT should explore increasing awareness/marketing campaigns for the existing regional service and continue to coordinate with Pinellas Suncoast Transit Authority (PSTA) and Sarasota County Transit, now operating as Breeze Transit, to improve existing connections. Although current connections to PSTA services are reasonable, a more frequent route may attract more ridership. However, due to the distance, expanding or adding regional service to meet the needs of the labor force residing outside of Manatee County will have funding implications that need careful consideration. The existing connection to Sarasota County, via Route 99, recently improved peak-hour frequency to 20 minutes, leading to increased regional connectivity on one of the most popular routes.

A comprehensive operational analysis of the existing route structure should be considered, as it may lead to efficiency improvements that may result in additional resources that could be used to increase or establish service to popular unserved or underserved trip generators.

Land Use

To better assess the impact of local land use conditions and policies on public transit needs, it is important to identify the current and future areas of Manatee County that may benefit the most from the provision of public transit services. Key findings from a review of current and future land use conditions are as follows:

- Transit-supportive land uses such as higher density residential and Residential/Office/Retail (ROR) designations are found mainly along major corridors, such as US 41 south of the City of Bradenton.
- Mixed-use land uses are generally found near major roads, such as I-75.
- There is a future development area boundary located east of Rye Road along the western boundary of Lake Manatee. The eastern part of the county is mostly designated for agricultural uses.
- In Bradenton, the Urban Village uses allow for 30 dwelling units per acre.
- In Palmetto, higher density residential land uses, more than 10 or 16 dwelling units per acre, are located adjacent to downtown.

- East of I-75, the master planned community, Lakewood Ranch, is composed primarily of low-density suburban residential uses and has some urban fringe designation. The low-density suburban residential use allows 1 dwelling unit per acre and urban fringe allows 3 dwelling units or 9 affordable housing/mixed-use dwelling units per acre.
- Residential permits have increased about 188% between 2012 and 2021. The majority of the permits issued are for single-family homes.

Implications

Florida land-use decisions have mostly favored the automobile for a very long time. However, sustained growth in both residential and commercial sectors are influencing land use and development decisions in Manatee County. As the county's economy grows and diversifies, MCAT can expect to see greater demand for a variety of services including new neighborhood circulators, park-and-ride facilities, and innovative alternative transportation options, such as water taxis or ferries. As developers and investors seek to create new places in Manatee County, MCAT will have the opportunity to recommend the inclusion of transit-friendly design and amenities.

Although Lakewood Ranch is primarily a low-density community, it is projected to continue to attract residents to the area and the community will continue to develop. Introducing non-traditional service concepts such as MOD zones may be a cost-effective way to connect those who need access to transit. The MOD Feasibility Study conducted by MCAT recommends two zones to serve the Lakewood Ranch areas. The southern zone covers I-75 to Lorraine Road from SR 70 to University Parkway, also connecting to the University Town Center in Sarasota County. The northern zone intersects with the southern zone between SR 70 and SR 64 along Lakewood Ranch Boulevard. The zones cover more than 10,000 residents and 6,000 jobs with various attractions in both the proposed north and south MOD areas.

MCAT should take advantage of this opportunity to continue to be involved and support changes in Manatee County that would result in transit supportive higher-density/intensity developments and/or TODs. However, low-density residential land uses/development, located in the southern part of the county, may be a challenging environment in which to provide efficient transit services as demand continues to grow. MCAT should continue to monitor route performance and adjust it as needed to respond to changing land use as the county continues to develop. Furthermore, MCAT should continue to work with municipalities and the County on strengthening its Land Development Codes with development requirements that are supportive of transit.

Transit-Friendly Land Use and Urban Design Efforts

Effective local land use and development policies, from simple local policies to larger initiatives such as Complete Streets, can help transit thrive. Implementing urban design features helps create an environment that is walkable and supports multimodal alternatives like transit. Additionally, implementing transit supportive urban design patterns, such as TOD, helps complement and encourage transit use. The following projects will continue to enhance multimodal connectivity in Manatee County:

- *10th Avenue Complete Street Study* – Improvements to multimodal elements along 10th Avenue from Riverside Drive to 17th Street West in Palmetto.

- *Sarasota/Manatee US 41 Corridor Mobility and Safety (CMASS)* – A study examining how to enhance multimodal mobility and safety conditions. This regional project assesses conditions on US 41 from University Parkway in Sarasota County to 8th Avenue in Bradenton. Furthermore, this project includes transit prioritization options.
- *Cortez Corridor Visioning Plan* – The goal of the plan is to enhance mobility and safety along Cortez Road.

Implications

Continued growth in various growth hot spots in Manatee County will continue to increase the demand for alternatives other than the automobile to travel to work and for other purposes. As MCAT looks at future needs, accommodating and facilitating increased multimodal options, such as bicycles and micromobility options, will likely become a priority. Manatee County continues to increase the multimodal network, including connected bicycle and pedestrian paths, and the expansion may encourage use. In effect, growing pedestrian and multimodal access may increase demand for transit to accommodate those utilizing the paths. Furthermore, as more electric scooter and other micromobility options establish a presence in Manatee County, MCAT may benefit from establishing public-private partnerships. This may include establishing pick-up/drop-off zones for micromobility near existing transit stops to encourage ridership.

Access to transit can spur real estate investment and also provide benefits such as reduced parking needs, multimodal pedestrian-friendly environments, and support for a greater mix of land uses. MCAT should coordinate with the County and local municipalities to focus on bike and pedestrian accessibility to transit stops. This effort should include building transit stops that are directly accessible from the respective destination. Moreover, MCAT has intentions to continue to add bus stop infrastructure, ensure ADA compliance, and include technology improvements in future plans. When making improvements or coordinating with other agencies, MCAT should refer to FDOT's Accessing Transit Handbook for guidelines that can be incorporated into designing proper transit access.

Community Feedback

Many public involvement activities were conducted to gather feedback from area residents and transit users, including public workshops, stakeholder feedback, public input surveys, and on-board surveys. These activities generated a wide range of ideas for existing service and future transit enhancements. Several key themes emerged from the TDP public outreach, including the following:

- *More service supply* – Approximately 26% of current riders identified having 30-minute service as the most important improvement and also indicated a desire for Sunday service. Approximately half of the general public survey respondents agreed that 30-minute service would make MCAT more appealing.
- *Transit as a viable alternative* – An overwhelming majority of the general public (83%) said transit must be provided, while 70% agreed that there is a need for more and improved transit in Manatee County. Most general public survey respondents (63%) indicated they would use a ferry/water taxi to get to Anna Maria Island.

- *Awareness* – Approximately 22% of the general public indicated the main reason they do not use MCAT is they do not know much or anything about it.
- *Existing rider profile* – Nearly two-thirds (63%) of MCAT riders utilize the service at least four times per week and are from low-income households with less than $25,000 annual household income (62%). The majority of riders (58%) are between 25 and 59 years old. Most importantly, more than one-third (34%) of current riders use the service to get to work.

Implications

Input from the community indicated that MCAT services are an integral part of the total transportation network in the county, as well as part of the fabric of the community. Both current riders and the general public want MCAT to continue to improve transit services. Increased service supply, like 30-minute frequency and adding service on Sundays, may be needed to increase the quality of service for current riders and attract potential new riders. These also would be critical enhancements if the County desires to grow transit to truly become a viable transportation alternative. Continued success depends on the ability of MCAT to adapt and implement services that will expand its rider base and capture new transit markets.

The top transit improvement indicated by both the general public and riders was frequency improvements. Although this improvement is the most desired, it is also the costliest to implement across the board. Increasing frequency on higher-performing routes may generate more demand and increase awareness in the community, as buses are “moving billboards” for transit service. The potential benefits of attracting discretionary ridership include reduced traffic congestion and reduced need for parking. Additionally, both discretionary riders and traditional riders benefit from frequent services.

The lack of awareness of current services was mentioned by non-riders. Although day-to-day operations are demanding, marketing MCAT services are a key need. Hiring a full-time marketing coordinator will help process and implement input as it is submitted while also promoting the value and benefits of transit in Manatee County. The marketing coordinator may also utilize social media campaigns directed towards youth and college students to continue generating more awareness among younger generations, which research suggests are more open to transportation alternatives than previous generations.

MCAT has a unique opportunity to use this public input to reimagine various aspects of its network and refresh the network due to going fare-free and changed travel trends due to the COVID-19 pandemic. If more people work from home and some decide to forgo their personal vehicles or not use them due to the burden of carrying insurance, that may provide an opportunity for MCAT to fill that gap to connect them to goods and services.

Organizational Structure Evaluation

MCAT currently functions as a division of the Manatee County Public Works Department to provide fixed-route services and the ADA complementary paratransit and Transportation Disadvantaged services known as Handy Bus. An organizational structure evaluation was conducted to examine staffing levels and explore if they are sufficient for current service levels and possibly to support any proposed enhancements to the transit network. The

evaluation includes a comparison of MCAT staffing levels to those of previously identified peer agencies.

According to the Florida Transit Information System (FTIS), MCAT employs 79 Full Time Employees (FTE) in operating, maintenance, and administrative capacities. It should be noted that three transit agency in MCAT's peer size group did not report FTE data. Therefore, a comparison was completed using the remaining peers. Current MCAT fixed-route services have less full-time employment in all categories than its peer average (Table 5-4).

Table 5-5 compares MCAT staffing levels in each staff category to the peer system averages for operational characteristics. MCAT operates with fewer staff compared to its peer averages across both the operations and maintenance staff categories. Table 5-6 shows the number of staff that MCAT would employ if its total FTE was equivalent to the peer agency FTE per operational characteristics.

Table 5-4: MCAT Fixed-Route FTE Employment Levels

Employee Type	Fixed-Route	Peer Average
Operating FTEs	65	72
Maintenance FTEs	8	9
Administrative FTEs	6	7
Total FTEs	79	88

Source: 2021 FTIS

Table 5-5: MCAT Fixed-Route and Peer System Staffing Review

Employee Category	Employee FTEs	Operational Characteristics		FTE per Operational Characteristic	
MCAT					
Operating	65	101,444	revenue hours	6.41	10,000 revenue hours
Maintenance	8	1,473,175	revenue miles	0.54	100,000 revenue miles
Peer System Average					
Operating	74	98,969	revenue hours	7.48	10,000 revenue hours
Maintenance	10	1,539,398	revenue miles	0.65	100,000 revenue miles

Source: 2021 FTIS

Table 5-6: Current and Estimated MCAT Fixed-Route Staff Levels Based on Peer Average

Employee Type	Current Employees	Estimated Employees Based on Peer Average
Operating Employee FTEs	65	72
Maintenance Employee FTEs	8	9

Implications

Hiring and retaining bus operators has long been a challenge and was intensified during the COVID-19 pandemic. In March 2022, the American Public Transportation Association (APTA) released a policy brief titled Workforce Shortages Impacting Public Transportation Recovery that

suggests that 66% of agencies are having difficulty retaining employees and 71% have either cut service or delayed planned service increases due to driver shortages.

APTA's *Transit Workforce Shortage Report* from March 2023 also suggests that transit agencies were projected to experience a shortage of drivers due to increased retirement and the pandemic has exacerbated this problem. The driver shortage is a multi-faceted issue that can be affected by local conditions, long and strenuous hiring processes, and inflexible scheduling requirements.

Through the organizational assessment, it is revealed that MCAT has fewer employees across all staffing categories compared to similar size peer agencies. If any service expansions are implemented, it will be critical to continue strategizing and implementing creative efforts to hire drivers.

The maintenance results may indicate that MCAT operates a more efficient fleet than its peer agencies, although its average age of fleet is higher than the peers. It may also suggest that the agency is understaffed due to a tight labor market. If additional services are implemented, more vehicles will need to be purchased. This may lead to a more dire need for additional maintenance staff to ensure the vehicles are operating properly and MCAT is able to continue supplying quality service.

Technology/Innovation

MCAT continues to explore innovative ways to enhance the overall transit experience for riders by implementing new technologies. It currently offers riders access to a Manatee MyStop app that features the current locations of buses, text/call alerts for chosen bus stops, and any relevant service alerts. Furthermore, MCAT utilizes digital signage to notify riders of real time bus information and service changes. MCAT will continue to explore opportunities with digital signage including advertisement opportunities that are currently being explored on the Anna Maria Island Trolley. Several other technologies and trends are being considered to improve the efficiency and attractiveness of transit services, including the following:

- *Hybrid Vehicles* – Currently, MCAT operates a fleet of vehicles fueled by diesel. Replacing diesel buses with hybrid ones can help decrease carbon emissions and improve the image of MCAT in the community while also saving on fuel costs. MCAT should explore investing in hybrid vehicles when retiring those that are past the FTA useful life benchmarks. Although upfront capital costs of the vehicle are more expensive, there are long-term savings on fuel.
- *MOD* – MCAT currently operates two MOD zones in Longboat Key and Port Manatee. To use the service, reservations must be made by calling a phone number. Reservations can be made weekdays from 8:00 AM to 5:00 PM and for next-day service, riders must call by 5:00 PM the day before the trip. The MOD study suggests the service operates best with a reservation system that is available by mobile application or an online platform in addition to the phone system. Additionally, to attract users, riders should be able to pay with a mobile application and make same day bookings for convenience. Currently, MCAT is coordinating with its IT staff to include same day bookings for paratransit services.

- *Wi-Fi* –Although smart phones have data capabilities, providing Wi-Fi at major transfer centers or popular stops can offer convenience to riders and an incentive to use transit. Providing Wi-Fi on buses also can help improve the quality of the rider's experience and may help increase discretionary ridership.
- *Transit Signal Priority (TSP)/Queue Jumps* – With traffic congestion increasing and ongoing population increases, applying TSP and queue jumps to major corridors with high volume of traffic and intersections classified as "unreliable" could help reduce bus run time delays.

Implications

MCAT should continue to invest in new and emerging technologies to increase the accessibility of its services as it strives to attract new riders while increasing the quality of the experience for existing riders.

Research supports that current younger generations are more inclined to use public transit than older generations. Purchasing hybrid vehicles may allow MCAT to attract younger generation riders that are environmentally conscious and may currently think driving is the only option to travel locally.

Younger generations are also more likely to want to use a mobile app to book and pay for the ride. MCAT should consider implementing an app that allows for same day trip scheduling, cancellation, and fare payment. Most important, this app could allow the riders to know where their ride is at any given time, providing them with a higher level of certainty and less frustration than those that typically arise from delayed pickups. As MCAT coordinates with its IT staff to include same day booking for paratransit services, it should consider extending the technology upgrade to any existing and future MOD services.

Based on the results captured from the recent survey efforts, 28% of the general public and 41% of riders said Wi-Fi on buses and at stations would make MCAT more attractive. This may attract those connecting to work that may use their commute to continue to be productive.

Furthermore, MCAT is working with local partners, including FDOT District One, Sarasota/Manatee MPO, and Sarasota County to implement bus preferential treatments, such as TSP on US 41, one of the busiest transit corridors. Manatee County conducted studies and developed a concept of operations to improve the quality of transit services with TSP. The Sarasota/Manatee MPO has requested that FDOT with its regional partners purchase, implement, and maintain the passive TSP system for 6 to 12 months, although it is subject to change due to vendors or the lifecycle of the demonstration project. In the future, other preferential treatments such queue jumps, that allow transit vehicles operating in traffic to advance before queued traffic, could be added in conjunction with TSP. MCAT should continue close coordination to discuss infrastructure constraints and operational considerations that will require coordination and planning.

Funding

The composition of funding for transit is important as it directly affects the type and quality of service in the area. MCAT currently operates using a combination of federal funds, State grants, local funding, and advertising revenues. In addition to the regular mix of

funds, MCAT has been successful with partnering for funding mechanisms that benefit the community. This includes Urban Corridor grants for the AMI Trolley and Route 99. This grant supports the 20-minute frequency on Route 99. Furthermore, the FDOT Service Development grant partially funds the frequency improvements on Route 2, while the Manatee County Redevelopment Division provides another part of funding for this enhancement. Additionally, MCAT was granted an FDOT Service Development grant for Route 6 which is scheduled to start in Fall 2023.

In 2022, the Board of County Commissioners (BoCC) voted to create a fare-free pilot project for MCAT services. The local and regional fixed-route, paratransit, and shuttle services are fare-free as of November 1, 2022, through early 2024. By moving to a fare-free service, it is anticipated that there will be higher ridership. However, fare free service also brings issues with respect to overcrowding and increased use of the system by the homeless community.

Implications

As MCAT explores fare-free services, it should prepare to focus on efficiency and encouraging ridership on key corridors. The majority of transit agencies are facing challenges due to uncertainties of what the "new normal" will look like for transit users. Funding will continue to be a challenge as federal funds that were dispersed during the pandemic will cease in FY2025. Compounding revenue shortages is record-high inflation. This leads to all costs increasing to ensure quality service is continued.

Securing new sources and bolstering existing dedicated local funding should be a priority for MCAT. As improved transit services may attract more visitors and can bolster economic development by connecting workers to jobs, the cities of Bradenton, Anna Maria, Holmes Beach, Bradenton Beach, and Longboat Key may be open to dedicating a portion of their local funds as an investment/fair share allocation. As these areas have high tourism, cities may also consider using parking revenues or a hotel bed tax as a way to contribute to transit. With improved transit service and other riding arrangements with MCAT, hotels may be able to rely on transit services to provide necessary transportation to their guests, resulting in hotels moving away from transporting people via private shuttles.

Another alternative to providing mobility to Anna Maria Island is the provision of a park and ride shuttle originating from a larger parking lot or garage on the mainland area. Mantee County was able to receive state legislation approval for the construction of a parking garage at the Manatee County Public Beach, however, local municipalities strongly oppose the implementation of this project. A more effective solution may originate from the mainland and serve the island through direct transit access to the Island.

Manatee County is home to higher education centers, which have previously been funding partners. While these partnerships lapsed during the fare-free period, it would be worth reconsidering what services may be useful for some of these schools.

Reconfiguring services and introducing or expanding non-traditional service concepts, such as MOD zones in areas with lower population density/low service demand, may be a cost-effective way to aid those who need access to transit. The savings from such efforts then can be used to fund enhancements in high demand areas to help attract more discretionary riders. Overall, the

TDP is a vision plan and should still provide a strategic blueprint that MCAT needs to make transit work for its community and the region in the next 10 years.

Regional Coordination

The primary way that MCAT ensures regional coordination is by maintaining strong working relationships with its partners. As part of its vision for enhancing mobility in the region, MCAT partners with Breeze Transit and PSTA to connect riders to Sarasota and Pinellas counties, respectively. MCAT and Breeze Transit recently collaborated on an initiative to improve quick regional connections by increasing the frequency on Route 99 to 20 minutes throughout the day.

MCAT and Breeze Transit staff are also exploring the potential of expanding the existing Breeze OnDemand service on Longboat Key. Currently, a Breeze OnDemand zone serves Longboat Key within Sarasota County's jurisdiction, which can be confusing to visitors and residents.

Furthermore, businesses and communities near the Sarasota-Manatee border continue to establish and grow. Lakewood Ranch continues to be a popular community and has plans to expand its geographic footprint with residential uses of various densities. Furthermore, the Mall at University Town Center continues to attract businesses, becoming an economic and recreational hub. Nathan Benderson Park is a major regional attraction and may soon be the site of the Mote Marine Aquarium.

As the Sarasota-Bradenton International Airport (SRQ), which is located in both Manatee and Sarasota counties, continues to attract visitors, it is building a surface transportation center that will transform the transit hub. The area will be converted to a waiting area for transportation network companies; further away from this will be a transit only waiting area with four bus bays, information displays, and overhead coverage. Currently, there are two MCAT and two Breeze Transit routes that serve SRQ. These new amenities may increase the demand for transit options from SRQ and possibly decrease the demand for parking or rental cars. The transportation center will support the regional multimodal network and increase connectivity.

Implications

Partnerships with regional partners such as the MPO, PSTA, Breeze Transit, and FDOT continue to play an integral part in improving and providing regional transit services. As the public and visitors to the region are rarely concerned with geopolitical boundaries, it is imperative for MCAT to maintain strong regional partnerships to ensure easy movement between transportation systems. As Longboat Key is a popular destination, visitors and residents may want to travel to attractions throughout the area and may find it difficult with the current boundary restrictions. Furthermore, Lakewood Ranch and the Mall at University Town Center will continue to increase demand for various service types. This will also require extensive coordination between MCAT and Breeze Transit as the Manatee-Sarasota county line continues to become muddled with these popular destinations. MCAT and Breeze Transit should continue to discuss and implement expanded service options to serve their riders.

Furthermore, MCAT should leverage its partnership with PSTA to explore increasing frequency on existing services or providing additional services to and from Pinellas County as it is estimated that more than 17,000 commuters travel to and from Pinellas and Manatee counties. Although

Hillsborough County is one of the top inflow and outflow commuter destinations, there are currently no connections with Manatee County. MCAT should continue to explore and monitor any opportunities to partner with Hillsborough Transit Authority (HART).

6.0 Goals and Objectives

Setting goals and objectives is a critical component for a TDP since they help to steer the direction of the agency in attending to the community's vision. These goals and objectives were crafted through careful consideration of all the information that has been received throughout this and previous TDP processes. As such, this TDP provides both a continuation from MCAT's previous goals, and a realignment with new objectives that have been identified in the current TDP process. The following section presents MCAT's vision and mission statements followed by the updated goals and objectives that will support the community's vision for transit services throughout the next 10 years.

MCAT Vision

To be a world-class public transit system that enhances the quality of life in Manatee County.

MCAT Mission

To provide citizens and visitors of Manatee County with an **efficient, reliable, and affordable** public transportation service.

Goals and Objectives Update Guidance

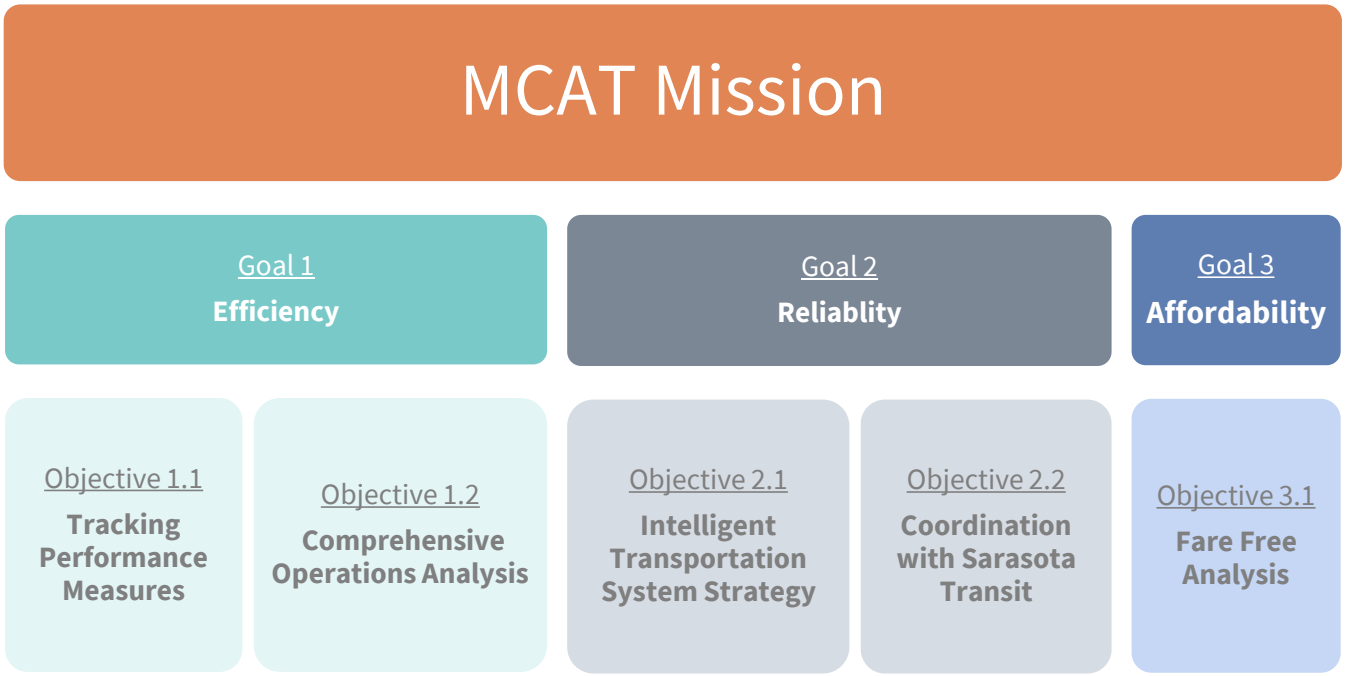
The following sources were used to guide the update of the adopted TDP goals and objectives for the next 10 years:

- Goals and objectives from the last TDP and progress on 2018 TDP Implementation Goals.
- Findings from the Situation Appraisal that identified key issues affecting MCAT today and in the future.
- Input received from the public and stakeholders on the needs and direction of transit in Manatee County and the immediate region.
- Findings from plan and policy reviews based on recommendations, goals, and objectives included in other agency plans.

MCAT Goals and Objectives

MCAT best promotes, achieves, and aligns itself with its vision and mission by establishing a set of objectives and performance measures that broadly address the mission statement's goals: efficiency, reliability, and affordability. Progress made towards each will be monitored annually throughout the life of this adopted TDP and will be reported in the TDP Annual Progress Report (APR).

Figure 6-1: MCAT Goals and Objectives



Goal 1: Efficiency

An efficient transit service is one that provides incremental system improvements to ensure that the service is expeditious without generating unnecessary financial burdens. Achieving this balance requires a close look at the transit system operations and an adaptation of its various moving parts. MCAT presents two objectives as an approach to achieve this goal: a constant monitoring of performance measures (at least annually), and a Comprehensive Operations Analysis (COA).

Objective 1.1: Tracking Performance Measures

MCAT has selected seven performance measures that broadly indicate the agency's performance in various areas, including supply and demand, safety, customer service, maintenance quality, and stability. The following lists and describes the performance measures and MCAT's stated commitment to each of them. Table 6-1 lists the performance measures, and their baseline value with indications about the desired trend and an evaluation of the current value.

Measure 1.1.1: Annual Ridership

Continually increasing overall system ridership is a recurring goal for MCAT. The overall trend of ridership has been upward for MCAT since a dip in ridership during the pandemic period. Fixed-route ridership is projected to continue to grow through the next few years of the TDP. MCAT ridership has increased since the implementation of fare-free service in November 2022.

Measure 1.1.2: Average Frequency

The primary goal of this TDP is to continue increasing the frequency of MCAT's existing routes. Currently, the majority of MCAT fixed routes offer service every hour; only two routes offer service every two hours. In 2022, the average frequency of the 11 fixed routes was 64 minutes (not including the 20-minute service on Anna Maria Island or the twice

daily service to Pinellas County). MCAT has been using FDOT Service Development Grants to increase the frequency of several routes, including Routes 3 and 99. In December 2023, Route 6 will begin service every 30 minutes. MCAT will continue to strive to improve the frequency of service on as many of its core network routes as possible.

Measure 1.1.3: Total At-Fault Accidents per Year

MCAT has identified the reduction of at-fault traffic accidents as a critical performance measure to control. A large increase in such accidents was observed between FYs 2021 and 2022, jumping from 62 to 87. The Safety & Training Team indicated that these figures in FY 2023 were on track to match or surpass the FY 2022 value. As such, MCAT has decided that it will hold regular Safety Committee meetings to include Transit Operator representatives. These staff additions will assist MCAT in meeting its goal to reduce the number of at-fault accidents.

Measure 1.1.4: Tracked Complaints

MCAT tracks customer complaints (many of which come from the Manatee MyStop mobile application) and hopes to steadily decrease the number of complaints received. In 2022, MCAT created a Safety & Training Team to train and re-train transit operators.

Measure 1.1.5: System Failures per 100,000 Revenue Miles of Fixed Route Service

System failures can be largely attributed to the state of maintenance in which MCAT's fleet is kept. Thus, MCAT will continue to provide high levels of maintenance over its fleet to ensure endurance and lower the number of system failures in its fixed-route service.

Measure 1.1.6: System Failures per 100,000 Revenue Miles of Demand Response Service

A similar level of maintenance will be provided for Demand Response services.

Measure 1.1.7: Annual Operator New Hires

The Safety & Training Team will also assist MCAT in meeting its goal to improve training and driver retention.

Objective 1.2: Comprehensive Operations Analysis

MCAT is committed to conducting a comprehensive operations analysis to create an efficient, reliable, and affordable public transportation service for Manatee County. Systemwide improvements recommended through this process will help reduce service redundancies and target areas of high community need, among other things.

Goal 2: Reliability

A reliable transit service is one that aims to provide an easy-to-understand service at the time the service is expected. Achieving this goal relies on methods that can improve the timeliness of service, often through very small but meaningful measures. MCAT presents two objectives to achieve this goal: implementing an Intelligent Transportation Systems (ITS) strategy and coordinating a reliable regional transit service.

Objective 2.1: Intelligent Transportation Systems Strategy

The modern public transit agency now relies on a host of different technologies to provide real-time bus location, service notices, and other information directly to the public, often through a

mobile phone application, webpage, and digital signage. That system includes bus schedules and other data from a variety of software and hardware systems. MCAT will evaluate its existing technology systems and develop a comprehensive Intelligent Transportation Systems (ITS) strategic approach for the agency.

Objective 2.2: Quarterly Coordination Meetings with Sarasota County Transit

MCAT works closely with Sarasota County's public transit system, Breeze Transit (formerly SCAT and now branded as Breeze Transit). The agencies jointly operate the regional Route 99 on US 41. As a regional connector, Route 99 is the busiest route for both bus systems. The two agencies hold quarterly coordination meetings to discuss topics such as Route 99 schedules, fare policies, and service changes. Currently, the two agencies are working closely to create a single mobility-on-demand service on Longboat Key.

Goal 3: Affordability

An affordable transit system is one that provides services that can compete with the cost of other modes of transportation while also being affordable for those who have no alternative to public transit. This is best achieved by reducing unnecessary financial burdens that could be passed on to riders and continually assessing the fare structure to ensure that it is both reasonable and affordable. To this end, MCAT proposes one objective: to conduct a Fare-Free Equity and Impact Analysis.

Objective 3.1: Fare-Free Analysis

Since November 2022, MCAT has provided fare-free public transit service as part of an 18-month pilot program. At present, ridership is trending slightly upward when compared to preceding years. By early 2024, MCAT will analyze the results of the fare-free service pilot to assess the equity of fare revenue impacts, ridership changes, and the safety and security of the transit system.

Goals and Objectives Assessment

To supplement Objective 1.1, Table 6-1 will assist MCAT in tracking the various performance measures that will be reviewed annually.

Table 6-1: Performance Measures Tracking

	Performance Measure	2022 Baseline	Desired Trend	Status
1	Annual Ridership	1,244,847	↗	
2	Average Frequency	64 minutes	↘	
3	Total At-Fault Accidents Per Year	26	↘	
4	Tracked Complaints	86	↘	
5	System Failures per 100,000 Revenue Miles of Fixed Route Service	24.14	↘	
6	System Failures per 100,000 Revenue Miles of Demand Response Service	56.30	↘	
7	Annual Operator New Hires	32	↗	

To assist in tracking the implementation of MCAT's stated goals and objectives over the TDP period, Table 6-2 allows MCAT to comment on the status of objectives within each APR.

Table 6-2: Goals and Objectives Progress Assessment

Goal	Objective		Implementation Timeframe	Status
Efficiency	1.1	Performance Measure Tracking	Ongoing	
	1.2	Comprehensive Operations Analysis	2023/2024	
Reliability	2.1	ITS Strategy	2023	
	2.2	Quarterly Coordination Meetings with SCAT	Ongoing	
Affordability	3.1	Fare-Free Analysis	2024	

7.0 Transit Demand Assessment

In addition to using the GIS-based tools to assess latent demand, as summarized previously in Section 2, demand for ridership for the next 10 years was conducted using FDOT's Transit Boardings Estimation and Simulation Tool (T-BEST). This section outlines the ridership forecast methodology and summarizes the resulting ridership estimates.

Forecast Ridership Analysis

Ridership forecasts were prepared using the most recent version of T-BEST (Version 4.7.8487), 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, describes 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 MCAT system in T-BEST are presented below. The model used the recently-released T-BEST Land Use Model structure (T-BEST Land Use Model 2018), which is supported by parcel-level data developed from the Florida Department of Revenue (DOR) statewide tax database. The DOR parcel data contain 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 the model is not interactive with roadway network conditions. Therefore, ridership forecasts will not show direct sensitivity to changes in roadway traffic conditions, speeds, or roadway connectivity.

Transit Network

The transit route network for all existing MCAT routes was created to reflect 2022 conditions, the validation year for the model. General Transit Feed Specification (GTFS) data for MCAT as of September 2022 were obtained from MCAT as the base transit system. Data included:

- Route alignments
- Route patterns
- Bus stop locations
- Service spans
- Existing headways during peak and off-peak periods (frequency at which a bus arrives at a stop—e.g., 1 bus every 60 minutes)

The GTFS data were verified to ensure the most recent bus service spans and headways; edits were made as needed.

Socioeconomic Data

To gain consistency with local existing and projected socioeconomic conditions, updated zonal population and employment totals derived from the Transform 2045 LRTP was used. Using the 2045 LRTP data updates the Transit System Census, Employment and Parcel data. T-BEST identifies spatial intersection between the zonal data and the Census block group geometry of the region to calculate growth rates by Census block group. Once calculated, the Census block group growth rates are stored within T-BEST and applied when using all T-BEST analysis engines.

Using the data inputs listed above, the model captures market demand (population, demographics, employment, and land use characteristics) within ¼-mile of each stop.

Special Generators

Special generators were identified and coded into T-BEST to evaluate the opportunity for generating high ridership. MCAT special generators include the following:

- University – State College of Florida and New College of Florida
- Transfer Points – Downtown Station, Palmetto Station, DeSoto Station, Walmart/53rd Ave, Palmetto Walmart, Coquina Beach, Manatee County Public Beach, and Downtown Sarasota Station
- Shopping Mall – Ellenton Outlet Mall and University Town Center
- Hospital – Manatee Memorial Hospital, HCA Florida Blake Hospital, and VA Clinic
- Airport – Sarasota-Bradenton International Airport

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 (LRTPs).

However, whereas 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. In addition, T-BEST cannot display sensitivities to external factors such as an improved marketing and advertising program, changes in fare service for customers,

fuel prices, parking supply, walkability and other local conditions and, correspondingly, model outputs may over-estimate demand in isolated cases.

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 MCAT to integrate sound planning judgment and experience when interpreting T-BEST results.

Ridership Forecast

Using these inputs, assumptions, and route level ridership data obtained from MCAT, 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 (2024) and horizon year (2033) were developed. The Existing Scenario 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. The TDP Scenario assumes all improvements and enhancements to current services are estimated. Due to the ongoing fare-free program, this scenario was run without fares.

Table 7-1 shows the projected number of total annual riders by route in 2024 and 2033 derived from T-BEST. Table 7-2 lists the projected numbers in numerical order with the greatest projected increases at the top.

Forecast Ridership Analysis

Based on the T-BEST model projections, implementing the TDP Needs network may result in a ridership increase in 2024. Furthermore, implementing the TDP Needs network is projected to grow the overall annual ridership by 87% by 2031. The following describes additional details for this ridership analysis:

- The TDP Needs network is projected to add more than 868,000 riders to MCAT in 2024, an increase of nearly 45% more riders than maintaining the current network.
- The model results show that the most ridership growth in the TDP Needs network scenario will occur on the AMI Trolley (Route 5) (64%), Route 2 (60%), and Route 99 (46%).
- In the status-quo scenario, Routes 2, 5, 99, and 203 are projected to have a higher than systemwide-average increase in ridership without any additional enhancements.
- If the TDP Needs network is implemented, the annual ridership would exceed 4.1 million by 2033, over 4% growth per year.

Based on these projections, implementing the financially unconstrained TDP Needs network yields the largest ridership growth, as expected, while maintaining the existing service levels will yield only about 32% growth in the next 10 years.

Table 7-1: T-BEST Estimates | Existing and TDP Needs

Route	Existing		TDP Needs		Existing % Change	TDP % Change
	2024	2033	2024	2033		
1	73,877	91,436	92,565	123,439	24%	33%
2	118,051	165,271	231,380	370,207	40%	60%
3	237,661	304,206	241,149	308,671	28%	28%
4	95,788	123,453	98,977	127,595	29%	29%
5	591,907	817,706	748,353	1,226,558	38%	64%
6	136,224	168,275	195,495	252,413	24%	29%
8	61,336	73,188	65,976	78,900	19%	20%
9	48,187	54,353	50,075	61,526	13%	23%
12	40,493	47,713	48,613	62,027	18%	28%
13	39,474	48,351	42,892	52,926	22%	23%
16	92,493	113,485	97,858	124,834	23%	28%
75	10,189	11,933	10,384	12,303	17%	18%
99	370,513	511,286	612,862	894,751	38%	46%
201	27,418	34,396	29,274	36,737	25%	25%
203	5,877	7,976	6,410	8,774	36%	37%
LBK Shuttle	4,561	5,428	6,157	7,599	19%	23%
Port Manatee Shuttle	1,706	2,030	2,167	2,639	19%	22%
Ellenton/Parrish MOD*	N/A	N/A	85,043	101,852	N/A	20%
LWR North South MOD*	N/A	N/A	59,662	71,703	N/A	20%
LWR South UTC MOD*	N/A	N/A	147,810	170,703	N/A	15%
Central Bradenton Circulator	N/A	N/A	127,338	177,542	N/A	39%
Bradenton to Anna Maria Water Taxi*	N/A	N/A	56,074	74,252	N/A	32%
Total	**1,955,755**	**2,580,486**	**3,056,514**	**4,347,949**	**32%**	**42%**

**Premium services ridership derived with fares.*

Table 7-2: T-BEST Estimates | Existing and TDP Needs | Greatest to Least Percent Increase by Scenario

Route	Existing		TDP Needs		Existing % Change	TDP % Change
	2024	2033	2024	2033		
5	591,907	817,706	748,353	1,226,558	38%	64%
2	118,051	165,271	231,380	370,207	40%	60%
99	370,513	511,286	612,862	894,751	38%	46%
Central Bradenton Circulator	N/A	N/A	127,338	177,542	N/A	39%
203	5,877	7,976	6,410	8,774	36%	37%
1	73,877	91,436	92,565	123,439	24%	33%
Bradenton to Anna Maria Water Taxi*	N/A	N/A	56,074	74,252	N/A	32%
6	136,224	168,275	195,495	252,413	24%	29%
4	95,788	123,453	98,977	127,595	29%	29%
3	237,661	304,206	241,149	308,671	28%	28%
12	40,493	47,713	48,613	62,027	18%	28%
16	92,493	113,485	97,858	124,834	23%	28%
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Port Manatee Shuttle	1,706	2,030	2,167	2,639	19%	22%
LWR North South MOD*	N/A	N/A	59,662	71,703	N/A	20%
Ellenton/Parrish MOD*	N/A	N/A	85,043	101,852	N/A	20%
8	61,336	73,188	65,976	78,900	19%	20%
75	10,189	11,933	10,384	12,303	17%	18%
LWR South UTC MOD*	N/A	N/A	147,810	170,703	N/A	15%
Total	**1,955,755**	**2,580,486**	**3,056,514**	**4,347,949**	**32%**	**42%**

8.0 Transit Needs Development and Evaluation

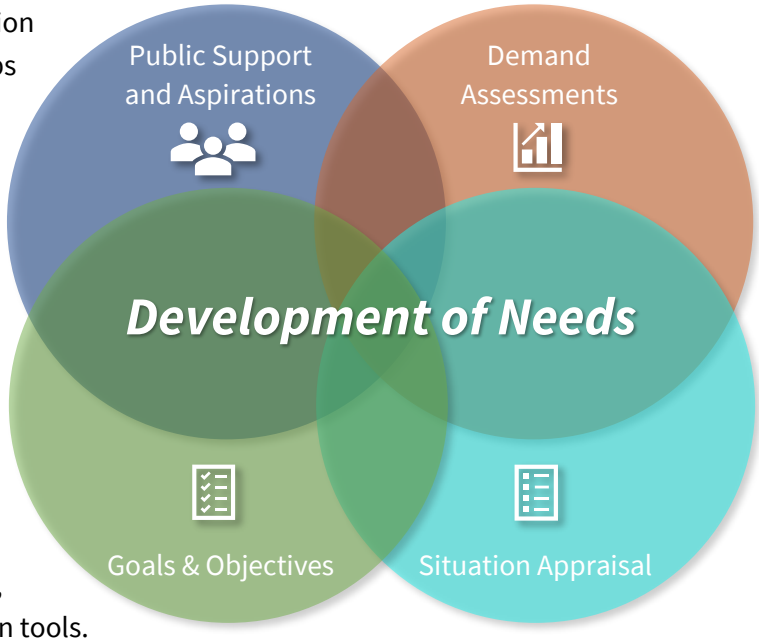
This section summarizes the development of potential transit improvements for MCAT's 10-year TDP. The needed improvements, referred to also as alternatives, represent the potential transit needs for the next 10 years. It should be noted that these needs were developed without any consideration for funding constraints to reflect the true needs of the community.

The needs were developed based on information gathered through various data collection, analytical, and outreach efforts conducted for the TDP. The identified service alternatives were then prioritized. The prioritized list of improvements is used thereafter to develop the 10-year implementation and financial plans.

Development of Transit Needs

The 2024–2033 TDP transit needs consist of improvements that enhance existing MCAT services and expand transit service to new areas. The improvements reflect the transit needs for the next decade and have been developed based on information gathered through the following methods:

- *Public Support and Aspirations* - Multiple direct and indirect outreach techniques were used to obtain substantive public input on transit needs throughout the MCAT TDP planning process. An on-board bus rider survey, stakeholder interviews, several discussion group workshops, and public workshops were conducted to gather input from the selected stakeholders and the community regarding what improvements should be considered for the next 10 years.



- *Demand Assessments* - Transit demand and needs assessments were also conducted for Manatee County. The assessments include the use of various GIS-based analysis, methodologies that examined demographic data conducive to transit, and FDOT-approved demand estimation tools. When combined with the baseline conditions assessment and other technical analysis conducted for the TDP, the demand assessments were used to help identify areas with transit-supportive characteristics when developing the 10-year transit needs.
- *Goals and Objectives* - MCAT's goals and objectives updated as part of this 10-year TDP re-emphasize many of the agency's existing priorities, as well as outline new priorities for improvements based on transit needs. The objectives and policies often provide insight into transit needs within the community and the potential means with which to meet them.

- *Situation Appraisal* - MCAT's 10-year TDP is required by State law to include a situation appraisal of the environment in which the transit agency operates. This helps to develop an understanding of MCAT's operating environment in the context of key elements as specified in the TDP Rule. The implications from the situation appraisal findings were considered in identifying potential transit alternatives.

10-Year Transit Needs

Based on the aforementioned methods, service, capital/infrastructure, technology, and policy improvements were identified, as summarized in the remainder of this section.

Service improvements include strengthening the current system, expanding its reach and availability as well as adding new transit modes. Improvements to existing MCAT service include enhancements to route frequencies and hours/days of service to maximize their usefulness to the community.

The remainder of this section presents these service needs in further detail. The service recommendations are followed by the capital/infrastructure, technology, policy, and other improvements that are recommended to be in place to support the needed service recommendations.

Service Needs

Improve Frequency on High Performing Routes

Enhancing frequencies can help attract new discretionary riders and improve the quality of service for current riders using the system. This need was frequently requested by stakeholders, supported by on-board rider and public input surveys, and mentioned in long-range plans. A significant percentage of outreach respondents said transit would be more appealing if a bus came every 30 minutes. It is recommended that frequency should increase on the following routes:

- All day 20-minute service: Route 99
- 30-minute service: Routes 1, 6, 8, and 16

Expand Service Spans and Add Days of Service

With direction and support from local stakeholders and the community for increasing service supply, it is recommended to expand service spans on all routes to 10PM on weekdays. Furthermore, to enhance connections for commuters, additional trips on Route 203, linking Bradenton to downtown St. Petersburg in Pinellas County, are recommended. Expanding service to all days of the week was also mentioned as a priority by stakeholders and was a high priority from the public. These improvements will help build a dependable fixed-route network that will help improve the quality and appeal of transit to visitors and residents alike. The following improvements are recommended for consideration:

- Extend service on all routes until 10pm on weekdays
- Add one additional AM and PM service trip on Route 203
- Sunday service on Routes 1, 3, 6, and 99

Improve Connectivity Between Key Activity Hubs

Direction from the plans review and data analyses point to the need for additional quick connections to areas with rapid growth and activity hubs.

To meet the need to connect key locations within the Village of the Arts area and to connect that area to the adjacent downtown, the Central Bradenton Circulator is recommended. The service will be provided every 15 minutes to connect downtown Bradenton, high density residential, restaurants, LECOM park, Desoto Transfer Station, and other key locations in the city.

Implement App-Based On-Demand Transit

MOD is an increasingly popular transit service concept that allows riders, using a phone app or by calling a designated phone number, to request a ride in real-time or schedule in advance. MOD uses software to automate and optimize trip requests based on trip request times, origin and destination locations, vehicle location, and vehicle capacity considerations. Vehicle operators receive and respond to trip assignments as they are requested in real time.

The service is available and accessible to ambulatory and persons with disabilities, in addition to the general public. The concept promotes transit, provides efficient service in low-density areas, and enhances access to transit beyond current service areas. These services also can serve as first/last-mile service for riders of regular fixed-route transit services.

The following zones have been identified for the TDP:

- Ellenton/Parrish – Parts of the Ellenton-to-Parrish corridor along US 301 are not currently served by the fixed-route system and MOD would supplement the network. The zone would provide additional service to residents that have a medium to high orientation toward transit and low access to vehicles. This zone would also connect to Route 1 if residents or visitors would like to reach other destinations via fixed-route service.
- Lakewood Ranch North/South – An MOD zone would be created to provide connection to all residents and visitors in the northern Lakewood Ranch area through the use of an app or by calling a phone number to request a ride. This zone would connect to Route 12 and the Lakewood Ranch South/UTC MOD zone.
- Lakewood Ranch South/UTC – This zone would serve roughly 11 square miles, covering the area east of I-75 in the growing area of Lakewood Ranch. The potential MOD zone contains over 6,000 jobs and would connect residents to the Mall at University Town Center, job centers, recreation, and other lifeline trips. This zone would connect to Route 12 and the Lakewood Ranch North/South MOD zone.

Add Premium Water Taxi Service

With the unprecedented growth in Manatee County, there should be a focus on premium transit service between major activity centers. This includes water taxi service, which can allow residents and tourists alternative methods to reach jobs and recreational trips, reduce the parking demand, and be a faster option than driving, particularly during times of high traffic congestion.

The Bradenton Area Visitors Bureau is preparing to implement a water taxi service tentatively starting in late 2023. This service is proposed to connect the mainland to the beaches using existing landing docks. The service could also expand to other existing landings if demand

warrants. In the beginning, the water taxis will operate Friday through Sunday, 10:30 AM to 9:30 PM, with 45-minute headways.

The proposed stops include:

- Bradenton Day Dock
- Anna Maria Island City Pier
- Bridge Street Pier
- South Boat Ramp at the Coquina Docks

At this time, it is not certain whether or not MCAT will take over water taxi operations from the Bradenton Area Visitors Bureau in the future. Future changes in water taxi responsibilities will be incorporated into the TDP APRs.

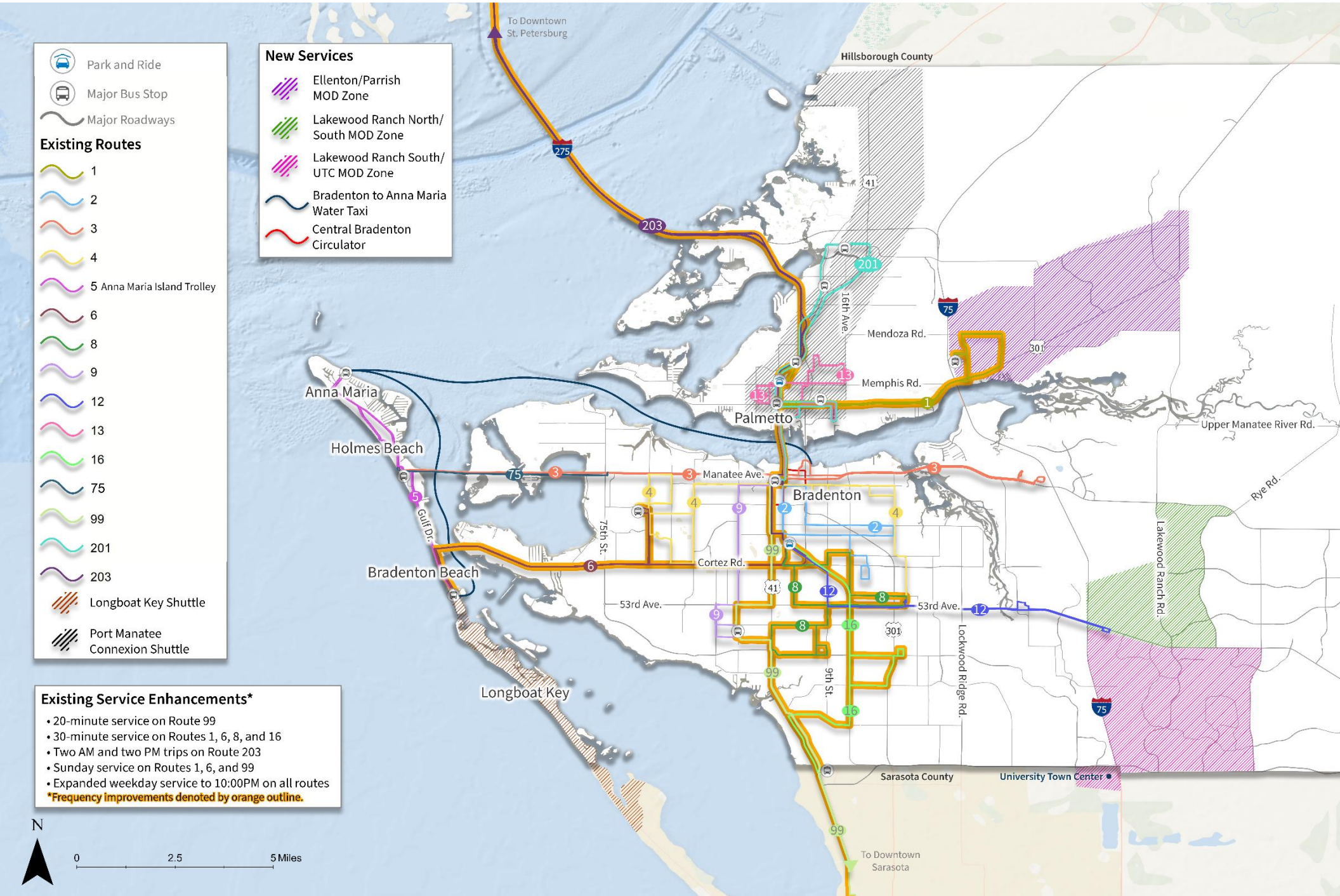
Table 8-1 summarizes the MCAT Needs network while Map 8-1 shows the MCAT service needs.

Table 8-1: MCAT Needs by Frequency

Route Type	Route ID	Route Description	Frequency Current/Needed		Service Span	Days of Service
Regional	1	Ellenton Outlet Mall	60	30	5:28 AM – 7:34 PM	Monday-Sunday
Local	2	East Bradenton	60	30	5:50 AM – 7:41 PM	Monday-Saturday
Regional	3	Manatee Avenue	30	30	5:50 AM – 9:25 PM	Monday-Sunday
Local	4	9th Avenue East and West	60	60	5:47 AM – 7:25 PM	Monday-Saturday
Regional	6	Cortez Road	60	30	5:20 AM – 8:21 PM	Monday-Sunday
Local	8	Oneco – Bayshore Gardens	60	30	6:05 AM – 7:24 PM	Monday-Saturday
Local	9	9th Avenue West	60	60	5:50 AM – 7:11 PM	Monday-Friday
Local	12	State Road 70	60	60	5:50 AM – 7:20 PM	Monday-Saturday
Local	13	Palmetto	120	120	5:55 AM – 6:57 PM	Monday-Saturday
Local	16	15th Street East	60	30	5:45 AM – 7:42 PM	Monday-Saturday
Trolley	75*	Beach ConneXion Shuttle	40	40	9:40 AM – 5:57 PM	Saturday-Sunday
Regional	99	US 41	20	20	5:15 AM – 9:28 PM	Monday-Sunday
Local	201	North County ConneXion	120	120	7:20 AM – 4:45 PM	Monday-Saturday
Regional	203	Skyway ConneXion	Two trips/day	Four trips/day	9:00 AM – 7:55 PM	Monday-Friday
Trolley	5	Anna Maria Island Trolley	20	20	6:00 AM – 10:43 PM	Monday-Sunday
Water Taxi	Water Taxi	Bradenton to Anna Maria Water Taxi	N/A	45	10:30 AM – 9:30 PM	Friday-Sunday
MOD	LBK	Longboat Key Shuttle			8:00 AM – 5:00 PM	Monday-Friday
MOD	PMX	Port Manatee ConneXion Shuttle			8:00 AM – 5:00 PM	Monday-Friday
MOD	EP	Ellenton/Parrish MOD Zone			5:30 AM – 8:00 PM	Monday-Saturday
MOD	LWRNS	Lakewood Ranch North/South MOD Zone			5:30 AM – 8:00 PM	Monday-Saturday
MOD	LWRUTC	Lakewood Ranch South/UTC MOD Zone			5:30 AM – 8:00 PM	Monday-Saturday

**Seasonal*

Map 8-1: MCAT 10-Year Needs



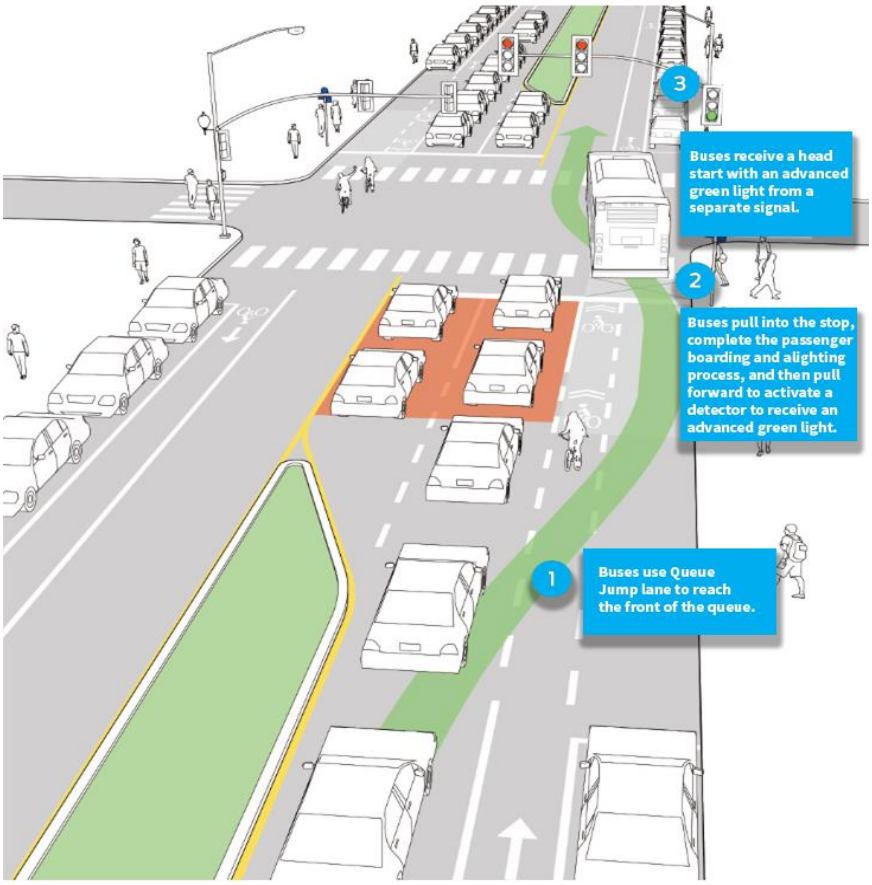
Capital/Infrastructure/Technology Needs

Implementation of all aforementioned transit services should be supported by necessary capital infrastructure and technology improvements to ensure an enhanced experience for MCAT users. The following improvements have been identified to support the operational investments summarized previously.

Technology Improvements

Increased traffic on key corridors, such as US 41, directly impacts the travel time of current and any new transit services operating in mixed traffic, possibly making them unattractive to potential riders and unreliable for current riders. Bus preferential treatments such as TSP and/or queue jumps may help MCAT in this regard as such measures have been used elsewhere to expedite the movement of transit services at intersections where traffic is backed up at peak travel times.

Figure 8-1: TSP with Queue Jumps



TSP and/or queue jumps are recommended for selected intersections that are most optimal for supporting enhanced transit services. This should help buses adhere to their schedules and improve their appeal over driving an automobile on the same corridor. Figure 8-1 shows how TSP and queue jumps prioritize transit movement at an intersection. MCAT should continue to coordinate with regional partner, FDOT, on planning and implementing TSP and queue jumps along major transit corridors.

Bus Stop Infrastructure Improvements

MCAT's program to purchase and install bus shelters, benches, bike racks, and other amenities should continue, with plans to invest in upgraded structures to support the network. Upgrading these amenities may attract more discretionary riders and provide its current riders with a comfortable and safe experience at its bus stops to the maximum extent possible.

ADA Compliance

MCAT has been investing in its infrastructure and should continue to upgrade its stops while increasing accessibility. In addition, MCAT should also consider developing a Bus Stop ADA

Accessibility Transition Plan to streamline its continuing investment in making its bus stops accessible to all bus riders.

Establish Fleet Replacement and Acquisition Program

With various frequency and new services, vehicle replacements and acquisitions are important components of this 10-year TDP. It is very important that MCAT develop a fleet replacement and acquisition program outside of its Transit Asset Management (TAM) Plan; this can improve system effectiveness and quality of service in a significant way when programmed in a timely fashion.

Policy and Other Needs

Transit Marketing

MCAT needs to expand its marketing efforts and reach out to major employers that could benefit from additional transit service. Furthermore, more public education on the benefits of transit and use of social media campaigns for targeted audiences is needed. Methods to access transit information should be expanded, including promoting the MyStop app.

Comprehensive Operations Analysis

Conducting a COA in the near term is needed to optimize the existing network by restructuring routes. With the "new normal" after the pandemic, and ongoing fare-free program, conducting a COA may help MCAT re-evaluate the network's effectiveness and efficiency.

Evaluation of Alternatives

This section presents the evaluation process and methodology for the 10-year transit needs previously identified in this report. After the TDP service alternatives were developed, an evaluation framework also was developed to assess the potential strategies and help MCAT set priorities for the next 10 years. The evaluation process is structured to cover a wide spectrum of factors that are qualitative and quantitative to ensure it is complete as well as comprehensive.

As mentioned, a quantitative-qualitative hybrid methodology was used to evaluate and prioritize the transit needs. By conducting this evaluation, MCAT can meaningfully prioritize projects and allocate funding using an objective process. The four evaluation categories identified in Table 8-2 below and the category weights discussed next were used to rank the TDP service needs.

Table 8-2: 10-Year TDP Service Needs Evaluation Factors and Weights

Criteria	Measure	Measure Description	Measure Weight	Criteria Weight
Public Preference	Public Outreach Results	Level of interest in specific alternatives from quantitative, measurable public outreach activities	25%	25%
Ridership Potential	Traditional Market Coverage	Percent coverage of traditional markets (areas with "High" or "Very High" rating from Transit Orientation Index)	15%	45%
	Discretionary Market Coverage	Percent coverage of discretionary markets (Density Threshold Assessment areas with 4 or more jobs or dwelling units per acre)	15%	
	Ridership Productivity	TBEST outputs for the 2033 trips per hour	15%	
Connectivity	First/Last Mile Connectivity	Improved connections to/from the fixed route network and other public transit services	15%	15%
Financial Feasibility	Cost Efficiency	Operating cost per trip	15%	15%
Total	**-**	**-**	**100%**	**100%**

A detailed summary of various measures used in the evaluation, as well as the alternatives scoring thresholds, are presented next.

Public Outreach

An extensive public outreach process was conducted for this TDP and resulted in numerous opinions and suggestions on transit services from transit users and non-users and local/regional stakeholders. In addition, a public input survey also was distributed to the general public via various media platforms to gauge their views on what transit services should look like in the next 10 years. Based on an in-depth review of input received, interest in a particular route or type of service was categorized as "None," "Moderate," "High," or "Very High" in the alternatives evaluation process.

Ridership Potential

For the evaluation of alternatives, three transit markets were identified:

- Traditional Market – 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" transit-oriented area was calculated.

- Discretionary Market – 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 for transit investment was used for the alternatives evaluation.
- Ridership Productivity – measured in terms of annual passenger trips per revenue hour of service. To provide for a relative comparison between alternatives, passenger trips and revenue hours of service were generated using output from the FDOT-approved ridership demand modeling software, T-BEST.

Connectivity

Each potential improvement was assessed for potential first/last-mile connectivity. Improvements that enhance connectivity can strengthen the overall network and make MCAT attractive to additional segments of riders. Improvements that have more potential first/last-mile connections were scored higher than those that do not. Based on conclusions drawn from public involvement input, quick and convenient connectivity is desired for existing and potential MCAT riders.

Financial Feasibility

Productivity is generally measured using cost-efficiency and is used by transit agencies to gauge how well they use resources. Ensuring cost-efficiency is critical to the success of the agency, and services projected to perform well in terms of their efficiency should receive a higher priority. Forecasts of ridership and operating costs for each individual alternative were used in this evaluation process.

- Cost efficiency – evaluated for each alternative using a transit industry standard efficiency measure, operating cost per passenger trip, which uses MCAT performance data and T-BEST 2033 ridership data. A higher cost efficiency may also mean better funding and policy support for the project.

Improvement Scoring Thresholds

For each transit alternative, a score was determined either through the computation of the selected measure or through professional judgment based on qualitative data reviewed. Scores for the more qualitative criteria (i.e., public input) were assigned based on a relative comparison of each transit alternative with other transit alternatives. 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, and operating cost per trip) were determined using the average of the entire data set and one standard deviation above or below the average.

Table 8-3 shows the thresholds and scoring for each criterion used in the alternatives evaluation.

Table 8-3: 10-Year TDP Service Needs Evaluation Scoring Thresholds

Criteria	Range	Score
Public Preference – General Observations	None	1
	Moderate	3
	High	5
	Very High	7
Traditional Market Potential (% Serving Traditional Market)	Less than (Average – 1 SD)	1
	Between (Average – 1 SD) to Average	3
	More than Average to (Average + 1 SD)	5
	More than (Average + 1 SD)	7
Discretionary Market Potential (% Serving Choice Market)	Less than (Average – 1 SD)	1
	Between (Average – 1 SD) to Average	3
	More than Average to (Average + 1 SD)	5
	More than (Average + 1 SD)	7
Ridership Productivity	Less than (Average – 1 SD)	1
	Between (Average – 1 SD) to Average	3
	More than Average to (Average + 1 SD)	5
	More than (Average + 1 SD)	7
First/Last Mile Connectivity Improvement	None	1
	Moderate	3
	High	5
	Very High	7
Cost Efficiency	Less than (Average – 1 SD)	1
	Between (Average – 1 SD) to Average	3
	More than Average to (Average + 1 SD)	5
	More than (Average + 1 SD)	7

Alternatives Evaluation Results

The 10-year transit service alternative priority rankings are presented in Table 8-4. As previously indicated, these transit alternatives were derived without consideration for the realities of impending financial constraints to realize the community's desired vision within the plan timeframe. Each alternative received a score by using the process summarized previously. The alternatives were then ranked based on their respective scores.

Based on the evaluation across these multiple qualitative and quantitative criteria, enhancing existing services by improving frequency and extending service spans present as the best improvements for transit going forward. The frequency improvements to Route 99 (20 minutes) and Routes 1, 6, 8, and 16 (30 minutes), and extending service on all routes until 10pm on weekdays were ranked in the top 3 improvements. MCAT and Breeze are anticipating the implementation of the 20 minutes frequency improvement on Route 99 by the end of Fall 2023, which will be provided through FDOT's Urban Corridor Grant. The financial and implementation planning phase should now be carefully assessed and adjusted, as necessary, so that it delivers a practical and implementable plan that is also funded.

Table 8-4: 10-Year TDP Service Needs Ranking

Service/Improvement	Public Outreach Results	Trad. Market Coverage	Discret. Market Coverage	Ridership Productivity	First/Last Mile Connectivity	Cost Efficiency	Weighted Scores
20 minutes: Route 99							6.1
30 minutes: Routes 1, 6, 8, and 16							5.2
Central Bradenton Circulator							5.1
Extend service on all routes until 10 PM on weekdays							4.7
LWR South UTC MOD							3.9
Bradenton to Anna Maria Water Taxi							3.9
Ellenton/Parrish MOD							3.9
Sunday service on Routes 1, 3, 6, and 99							3.6
LWR North South MOD							3.6
Add one additional AM and PM service trip on Route 203							2.2

Very High (7)  High (5)  Moderate (3)  Low (1) 

9.0 10-Year Transit Plan

This section of the TDP presents the Recommended Plan for future MCAT service. The proposed service improvements and capital projects are presented, followed by the financial plan to support funding of the improvements presented. Finally, the recommended implementation plan is presented. This Recommended Plan assumes the MCAT system will remain fare-free for the next 10 years.

Recommended Plan

Recommended Service Improvements

Service improvements that are funded but not yet operational are included. Map 9-1 shows improvements included in the Recommended Plan. Table 9-1 shows the service characteristics. A summary of the key elements include:

- Maintenance of existing fixed-route service levels.
- Maintenance of existing paratransit service levels while also accommodating growth based on identified expansion of service.
- Frequency Improvements
    - All day 20-minute service – Route 99
    - 30-minute service – Route 6
- Expanded Service Spans and Days of Service
    - One additional AM and PM service trip on Route 203
    - Sunday service on Routes 1, 6, and 99
- Improve Connectivity Between Key Activity Hubs
    - Implement Central Bradenton Circulator with 15-minute service.
- Implement App-Based On-Demand Transit
    - Lakewood Ranch North/South – MOD zone would be created to add connections in the northern Lakewood Ranch area.
    - Lakewood Ranch South/UTC – This zone would connect Lakewood Ranch residents to the Mall at University Town Center among other lifeline trips. This zone will be implemented based on the anticipated demand from the Lakewood Ranch North/South MOD zone.

Map 9-1: MCAT 10-Year Recommended Plan

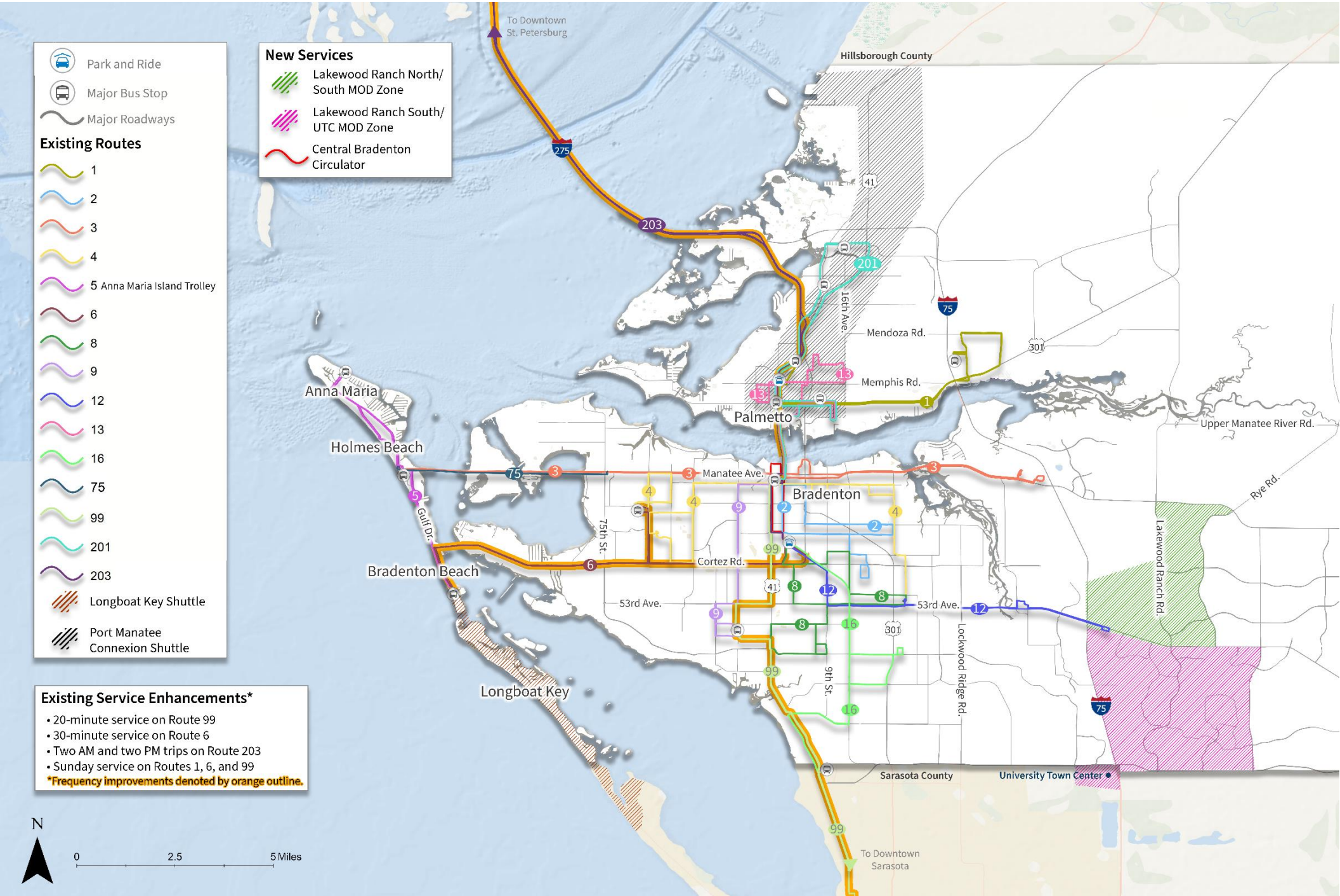


Table 9-1: Recommended Plan Service Characteristics | 2033

Route Type	Route ID	Route Description	Frequency Current/Plan		Service Span	Days of Service
Regional	1	Ellenton Outlet Mall	60	60	5:28 AM – 7:34 PM	Mon-Sun
Local	2	East Bradenton	30	30	5:50 AM – 7:41 PM	Mon-Sat
Regional	3	Manatee Avenue	30	30	5:50 AM – 9:25 PM	Mon-Sun
Local	4	9th Avenue East and West	60	60	5:47 AM – 7:25 PM	Mon-Sat
Regional	6	Cortez Road	60	30	5:20 AM – 8:21 PM	Mon-Sun
Local	8	Oneco – Bayshore Gardens	60	60	6:05 AM – 7:24 PM	Mon-Sat
Local	9	9th Avenue West	60	60	5:50 AM – 7:11 PM	Mon-Fri
Local	12	State Road 70	60	60	5:50 AM – 7:20 PM	Mon-Sat
Local	13	Palmetto	120	120	5:55 AM – 6:57 PM	Mon-Sat
Local	16	15th Street East	60	60	5:45 AM – 7:42 PM	Mon-Sat
Trolley	75*	Beach ConneXion Shuttle	40	40	9:40 AM – 5:57 PM	Sat-Sun
Regional	99	US 41	20	20	5:15 AM – 9:28 PM	Mon-Sun
Local	201	North County ConneXion	120	120	7:20 AM – 4:45 PM	Mon-Sat
Regional	203	Skyway ConneXion	2 trips/ day	4 trips/ day	9:00 AM – 7:55 PM	Mon-Fri
Trolley	5	Anna Maria Island Trolley	20	20	6:00 AM – 10:43 PM	Mon-Sun
Circulator	CBC	Central Bradenton Circulator	N/A	15	7:00 AM – 9:00 PM	Mon-Sat
MOD	LBK	Longboat Key Shuttle			8:00 AM – 5:00 PM	Mon-Fri
MOD	PMX	Port Manatee ConneXion Shuttle			8:00 AM – 5:00 PM	Mon-Fri
MOD	LWRNS	Lakewood Ranch North/South MOD Zone			5:30 AM – 8:00 PM	Mon-Sat
MOD	LWRUTC	Lakewood Ranch South/UTC MOD Zone			5:30 AM – 8:00 PM	Mon-Sat

**Seasonal*

Recommended Capital/Infrastructure/Technology Improvements

The following recommended capital, infrastructure, and technology improvements will support the service improvements in the Recommended Plan.

- Deploy TSP and Queue Jumps– Deploy TSP technologies and add queue jumps to enhance transit services on US 41.
- Upgrade Major Transit Stations – Implement and incorporate needed upgrades to major transit stations. These improvements include the digital signage to be installed at the new SRQ Surface Transportation Hub, which is currently under construction.
- Bus Stop Infrastructure and ADA Improvements – Continue to purchase and upgrade amenities and transit infrastructure. Developing an ADA Accessibility Transition Plan will streamline the investment process. The agency should explore additional funding opportunities, such as partnering with municipalities and private businesses, to improve the convenience of using transit facilities.

- Establish Fleet Replacement and Acquisition Program – Continue vehicle replacements and acquisitions to maintain the network and add any new services needing additional vehicles.
- Enhanced Performance Monitoring Program – A performance monitoring program tracks the performance and efficiency of routes and the system as a whole and provides a convenient tool for ensuring the provision of efficient and effective transit service. A sample performance monitoring program is included in Appendix F for MCAT's consideration.
- Modification/enforcement of parking regulations – Work with municipalities to modify and enforce parking regulations to increase the cost of parking so new parking revenue in partnering municipalities can be used to fund MCAT.
- Expand marketing/awareness campaign – Work with Manatee County marketing staff to expand the current advertising program, including electronic displays of local information and key points of interest on buses such as restaurant and attraction ads by paid advertisers. In addition, work with interested advertisers to announce their business/location information when a bus reaches a stop close to those locations.
- Expand App-Based Service to All On-Demand Services – When new app-based MOD service is implemented, expand the option for riders to use an app to reserve riders to all on-demand services, such as the Long Boat Key and Port Manatee Shuttles.

Recommended 10-Year Financial Plan

The Recommended Plan assumes costs will continue to increase with inflation over the 10-year timeframe. New grant or FDOT revenue sources may be added or increase over time based on new services implemented or planned service levels. The Recommended Plan budget, including annual inflation rates by cost and revenue category, is based on a variety of factors. These include service performance data from current MCAT services, information from other recent Florida transit plans, and discussions with MCAT staff. The operating and capital components of the Recommended Plan are presented in more detail below.

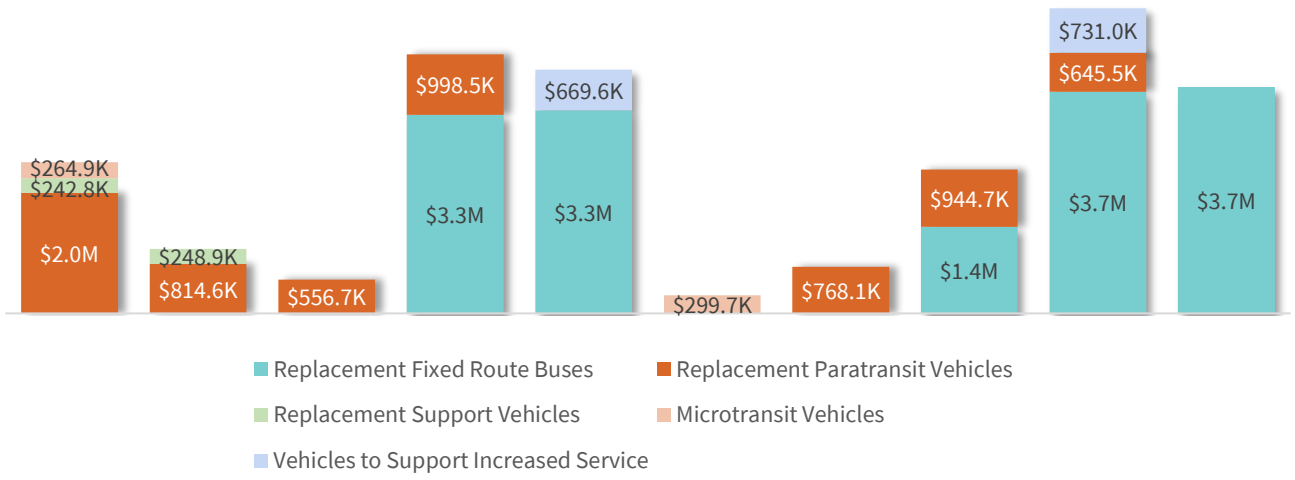
Recommended Plan Cost Assumptions

- Based on the Consumer Price Index (CPI)-based inflation data for the last 10 years, from 2013 to 2022, an average annual inflation rate of 2.2% was used for all operating cost projections. The cost per revenue hour was determined using 2021 data from NTD. A cost of $88.99 per revenue hour (2021$) and the CPI-based inflation rate of 2.2% was used.
- Annual operating costs for maintaining existing fixed-route, paratransit, and microtransit services are based on data provided by MCAT with an annual inflation rate of 2.2%.
- The cost per revenue hour for new fixed-route services was determined using the above method. A cost of $88.99 per revenue hour (2021$) and the CPI-based inflation rate of 2.2% was used.
- Operating cost projections for the new MOD services were based on service cost data using a SaaS model operation. Accessible vehicles provided by the selected operator were

assumed for providing MOD services. A cost per revenue hour of $50.00 (2023$) was used for projecting MOD costs. These costs are based on industry knowledge.

- Operating costs for the enhancement of existing services are based on data provided by MCAT with an annual inflation rate of 2.2%.
- Expansion of existing services that warranted new ADA Paratransit support used the cost of $118.93 per revenue hour (2021$) and the CPI-based inflation rate of 2.2%.
- Large bus replacements are assumed to cost $600,000 each, based on information from MCAT TAM Plan.
- A vehicle replacement schedule is presented in Table 9-2. This schedule assumes purchase of $24.0 million of fixed-route, paratransit, and microtransit vehicles to maintain service and new vehicles for service enhancements over the next 10 years. The plan also advances the purchase of 5 buses to FY2027 to maintain the FTA useful life standard and disperse the burden of vehicle purchases.

Table 9-2: Vehicle Replacement Cost Plan



- The following other capital and infrastructure costs are based on data from MCAT:
  - A 10-year total of $27.2 million for preventative vehicle maintenance.
  - The purchase of TSP/queue jumps is assumed at $1 million (2026$).
  - A 10-year total of $120,000 for upgrading major transfer stations.
  - An average annual allocation of $150,233 for bus stop infrastructure over the 10-year period.
  - An average of $100,000 annually for ADA improvements over the 10-year period.
  - An average annual allocation of $314, 771 for technology projects and upgrades from FY2024-2033.
  - An average of $300,000 annually for professional services, such as operating assistance, over the 10-year period. A COA, a component of the professional services, is estimated to cost $150,000 in FY2024.

Recommended Plan Revenue Assumptions

Revenues for the recommended plan are based on information from the 2022 APR, and discussions with MCAT staff. The assumptions for the revenue sources for the next 10 years include the following:

- Annual revenues from Federal, State, and local sources included in the MCAT Budget were projected to continue and were inflated at 2.2% per year.
- Revenues projections from federal sources, including annual FTA formula grant funds are based on information from MCAT. Short-term grants such as American Rescue Plan Act (ARPA) funding are expected to cease in FY2027.
- Revenue from the FDOT Block Grant Fund is expected to continue at $1.1 million per year (2024$). This may possibly increase due to increased ridership. Based on the FDOT State Block Grant formula, it is estimated that MCAT could receive approximately an additional $394,000 (2024$) annually. The increased ridership estimations are based on the FDOT-approved T-BEST program.
- Projections for Urban Corridor funds from FDOT are assumed to continue until FY2027, as also provided by MCAT.
- Existing revenues from the Florida Commission of Transportation Disadvantaged are assumed at $525,000 per year (2024$).
- Based on information from MCAT, local match for Federal and State contributions and general local contributions for FY 2024 is $10.2 million.
- MPO operating and capital assistance for the Central Bradenton Circulator are expected to be approximately $2.0 million over 10 years.
- Advertising revenue is expected to generate $65,000 per year (2024$).
- Existing paratransit fares, contracted fares and LBK fares are assumed at $292,000 (2024$) annually.
- A farebox recovery of 10% was used for new MOD services as on-demand services are considered premium and are highly convenient.
- This plan also assumes new additional funding to assist with the implementation of service and capital projects to improve the effectiveness of transit services, which could attract discretionary riders and increase the quality of service for existing riders locally and regionally.
    - The Safe Streets and Roads for All (SS4A) Grant for TSP/queue jump implementation is assumed at $1 million (2026$).
    - FDOT's Service Development grants for 50% of Sunday service for Routes 1, 3, 6, and 99 and half of the cost to increase frequency on Route 6 for the first three years of implementation.

Table 9-3 shows the cost revenue summary for the Recommended Plan.

Table 9-3: Recommended Plan Finance Plan | 2024-2033

Cost/Revenue	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	10-Year Total
Costs											
Operating Cost											
Maintain Existing Service - Fixed Route	$8,520,363	$8,902,692	$9,100,242	$9,302,177	$9,508,592	$9,719,588	$9,935,265	$10,155,729	$10,381,085	$10,611,441	$96,137,173
Maintain Existing Service - Paratransit	$4,093,175	$4,276,846	$4,371,749	$4,468,758	$4,567,920	$4,669,282	$4,772,893	$4,878,804	$4,987,064	$5,097,727	$46,184,218
Add Peak Hour Service to St. Petersburg (Route 203/Skyway ConneXion)	$0	$0	$0	$0	$0	$0	$0	$0	$190,438	$194,627	$385,065
Double Peak Hour Frequency on Route 6	$670,127	$685,335	$715,735	$731,617	$747,851	$764,446	$781,409	$798,749	$816,473	$834,590	$7,546,331
Route 99 - All-Day 20-Minute Frequency	$603,865	$630,962	$644,963	$659,275	$673,904	$688,858	$704,144	$719,769	$735,740	$752,066	$6,813,545
Implement Sunday Service on Select Routes (1, 3, 6, and 99)	$0	$0	$0	$0	$651,052	$742,687	$759,167	$776,013	$793,233	$810,835	$4,532,986
ADA Paratransit for Expanded Services	$0	$0	$0	$0	$110,426	$112,877	$115,381	$117,942	$120,559	$123,234	$700,420
Microtransit Services	$124,716	$130,313	$133,204	$136,160	$139,182	$142,270	$145,427	$148,654	$151,953	$155,324	$1,407,203
New MOD Service	$0	$0	$0	$0	$0	$511,683	$523,037	$534,643	$546,507	$1,667,432	$3,783,301
New Central Bradenton Circulator	$0	$0	$0	$0	$424,410	$433,828	$443,455	$453,295	$463,353	$473,635	$2,691,976
Total Operating Cost	**$14,012,246**	**$14,626,146**	**$14,965,893**	**$15,297,986**	**$16,823,338**	**$17,785,518**	**$18,180,178**	**$18,583,596**	**$19,186,404**	**$20,720,913**	**$170,182,218**
Capital Cost											
Replacement Fixed Route Buses - Maintain Existing Service	$0	$0	$0	$3,275,275	$3,347,953	$0	$0	$1,430,323	$3,655,156	$3,736,264	$15,444,972
Replacement Vans - Maintain Existing Paratransit Services	$1,986,863	$814,614	$556,653	$998,496	$0	$0	$768,051	$944,702	$645,547	$0	$6,714,926
Replacement of Support Vehicles	$242,839	$248,910	$0	$0	$0	$0	$0	$0	$0	$0	$491,749
Preventative Maintenance	$2,428,388	$2,489,098	$2,551,326	$2,615,109	$2,680,486	$2,747,499	$2,816,186	$2,886,591	$2,958,755	$3,032,724	$27,206,162
Vehicles to Support Enhanced Service	$0	$0	$0	$0	$669,591	$0	$0	$0	$731,031	$0	$1,400,622
Microtransit Vehicles (all zones)	$264,915	$0	$0	$0	$0	$299,727	$0	$0	$0	$0	$564,642
Vehicles	**$4,923,005**	**$3,552,622**	**$3,107,978**	**$6,888,880**	**$6,698,030**	**$3,047,226**	**$3,584,237**	**$5,261,617**	**$7,990,489**	**$6,768,988**	**$51,823,072**
TSP/Queue Jumps	$0	$0	$1,000,000	$0	$0	$0	$0	$0	$0	$0	$1,000,000
Upgrade Major Transfer Stations	$0	$0	$0	$40,000	$0	$0	$40,000	$40,000	$0	$0	$120,000
Bus Stop Infrastructure - Annual Allocation	$133,147	$139,122	$142,209	$145,364	$148,590	$151,887	$155,258	$158,703	$162,224	$165,824	$1,502,328
ADA Improvements - Annual Allocation	$100,000	$100,000	$100,000	$100,000	$100,000	$100,000	$100,000	$100,000	$100,000	$100,000	$1,000,000
Technology Projects (AVL, GPS Modem/DMS/Fareboxes)	$278,972	$291,491	$297,959	$304,570	$311,329	$318,237	$325,299	$332,517	$339,896	$347,438	$3,147,709
Comprehensive Operations Analysis	$150,000	$0	$0	$0	$0	$0	$0	$0	$0	$0	$150,000
Professional Services (Operating Assistance/P.S.)	$150,000	$250,000	$250,000	$250,000	$300,000	$300,000	$300,000	$350,000	$350,000	$350,000	$2,850,000
Other Capital/Infrastructure	**$812,119**	**$780,612**	**$1,790,168**	**$839,935**	**$859,919**	**$870,125**	**$920,557**	**$981,220**	**$952,120**	**$963,262**	**$9,770,037**
Total Capital Cost	**$5,735,125**	**$4,333,234**	**$4,898,146**	**$7,728,815**	**$7,557,949**	**$3,917,350**	**$4,504,793**	**$6,242,837**	**$8,942,609**	**$7,732,250**	**$61,593,109**
Revenues											
Operating Revenues											
FTA 5307 - Operating (Fuel)	$1,250,000	$1,306,090	$1,335,073	$1,364,698	$1,394,981	$1,425,935	$1,457,577	$1,489,920	$1,522,982	$1,556,777	$14,104,032
FTA 5307 - American Rescue Plan (ARP) - Operating	$1,200,000	$1,200,000	$1,200,000	$1,200,000	$0	$0	$0	$0	$0	$0	$4,800,000
FTA 5310 - Operating	$250,000	$261,218	$267,015	$272,940	$278,996	$285,187	$291,515	$297,984	$304,596	$311,355	$2,820,806
FDOT Block Grant Funds	$1,135,967	$1,186,940	$1,213,278	$1,240,201	$1,267,721	$1,295,852	$1,324,607	$1,354,000	$1,384,045	$1,414,757	$12,817,368
Anticipated New FDOT Block Grant Funds	$394,034	$428,072	$445,092	$462,111	$479,130	$496,149	$513,168	$530,188	$547,207	$564,226	$4,859,377
FDOT Urban Corridor for Route 99	$150,000	$156,731	$160,209	$163,764	$0	$0	$0	$0	$0	$0	$630,703
FDOT Urban Corridor for AMI Trolley	$750,000	$783,654	$801,044	$818,819	$0	$0	$0	$0	$0	$0	$3,153,517
Existing Paratransit Fares, Contracted Fares and LBK Fares	$292,000	$305,103	$311,873	$318,793	$325,867	$333,098	$340,490	$348,045	$355,769	$363,663	$3,294,702
Transportation Disadvantaged (TD) Grant (State of FL)	$525,000	$548,558	$560,731	$573,173	$585,892	$598,893	$612,182	$625,767	$639,652	$653,846	$5,923,693
Advertising Revenue	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$65,000	$650,000
FTA 5307 - Operating (50% match)	$1,500,000	$1,567,309	$1,602,087	$1,637,637	$1,673,977	$1,711,122	$1,749,092	$1,787,904	$1,827,578	$1,868,132	$16,924,838
FTA 5310 - Operating (50% match)	$250,000	$261,218	$267,015	$272,940	$278,996	$285,187	$291,515	$297,984	$304,596	$311,355	$2,820,806
FDOT Urban Corridor for AMI Trolley (50% match)	$750,000	$783,654	$801,044	$818,819	$0	$0	$0	$0	$0	$0	$3,153,517
Local Operation Contribution for AMI Trolley	$0	$0	$0	$0	$1,673,977	$1,711,122	$1,749,092	$1,787,904	$1,827,578	$1,868,132	$10,617,805
Transportation Disadvantaged Grant (10% match)	$52,500	$54,856	$56,073	$57,317	$58,589	$59,889	$61,218	$62,577	$63,965	$65,385	$592,369
Local Match for FDOT Block Grant	$1,530,000	$1,615,012	$1,658,370	$1,702,312	$1,746,851	$1,792,001	$1,837,775	$1,884,188	$1,931,252	$1,978,983	$17,676,745
FDOT Service Development Grant for Sunday Service	$0	$0	$0	$0	$325,526	$371,343	$379,584	$0	$0	$0	$1,076,453
Local Match for Sunday Service	$0	$0	$0	$0	$325,526	$371,343	$379,584	$388,006	$396,616	$405,417	$2,266,493
FDOT Service Development Grant for Frequency Improvement	$335,063	$342,667	$357,867	$0	$0	$0	$0	$0	$0	$0	$1,035,598
Local Match for Frequency Improvement	$335,063	$342,667	$357,867	$0	$0	$0	$0	$0	$0	$0	$1,035,598
Transportation Tax Contribution	$6,077,466	$6,259,790	$6,447,583	$6,641,011	$6,840,241	$7,045,448	$7,256,812	$7,474,516	$7,698,752	$7,929,714	$69,671,332
Fare Revenue from MOD	$0	$0	$0	$0	$0	$30,906	$31,591	$32,292	$33,009	$100,713	$228,511
Local contribution for Central Bradenton Circulator	$0	$0	$0	$0	$212,205	$216,914	$221,727	$226,647	$231,677	$236,818	$1,345,988
MPO contribution for Central Bradenton Circulator	$0	$0	$0	$0	$212,205	$216,914	$221,727	$226,647	$231,677	$236,818	$1,345,988
Total Operating Revenue	**$16,842,093**	**$17,468,540**	**$17,907,220**	**$17,609,535**	**$17,745,680**	**$18,312,305**	**$18,784,257**	**$18,879,571**	**$19,365,951**	**$19,931,091**	**$182,846,242**
Capital Revenues											
FTA 5339 - Capital (Annual Formula)	$466,900	$473,904	$481,012	$488,227	$495,551	$502,984	$510,529	$518,187	$525,959	$533,849	$4,997,101
FTA 5307 - Capital (Annual Formula)	$3,501,750	$3,554,276	$3,607,590	$3,661,704	$3,716,630	$3,772,379	$3,828,965	$3,886,399	$3,944,695	$4,003,866	$37,478,256
Federal 5339 (b) for Capital (Grant for Bus Rehabilitation)	$450,000	$350,000	$0	$0	$0	$0	$0	$0	$0	$0	$800,000
FTA 5310 - Capital	$350,000	$365,705	$373,820	$382,115	$390,595	$399,262	$408,121	$417,178	$426,435	$435,897	$3,949,129
FTA 5310 - Capital - Local Match	$35,000	$36,571	$37,382	$38,212	$39,059	$39,926	$40,812	$41,718	$42,643	$43,590	$394,913
Safe Streets and Roads for All (SS4A) Grant for TSP/Queue Jump	$0	$0	$1,000,000	$0	$0	$0	$0	$0	$0	$0	$1,000,000
MPO contribution for Central Bradenton Circulator vehicle	$0	$0	$0	$0	$669,591	$0	$0	$0	$0	$0	$669,591
Total Capital Revenue	**$4,803,650**	**$4,780,456**	**$5,499,805**	**$4,570,258**	**$5,311,425**	**$4,714,551**	**$4,788,427**	**$4,863,481**	**$4,939,733**	**$5,017,202**	**$49,288,989**
Total Costs	**$19,747,371**	**$18,959,380**	**$19,864,039**	**$23,026,801**	**$24,381,287**	**$21,702,868**	**$22,684,972**	**$24,826,433**	**$28,129,013**	**$28,453,163**	**$231,775,327**
Total Revenue	**$21,645,743**	**$22,248,995**	**$23,407,024**	**$22,179,794**	**$23,057,105**	**$23,026,856**	**$23,572,684**	**$23,743,052**	**$24,305,684**	**$24,948,293**	**$232,135,231**
Annual Revenues Minus Costs	**$1,898,372**	**$3,289,615**	**$3,542,985**	**-$847,007**	**-$1,324,182**	**$1,323,989**	**$887,712**	**-$1,083,381**	**-$3,823,329**	**-$3,504,870**	**$359,904**
Rollover from Previous Year	**$0**	**$1,898,372**	**$5,187,987**	**$8,730,972**	**$7,883,965**	**$6,559,784**	**$7,883,772**	**$8,771,485**	**$7,688,104**	**$3,864,774**	

Recommended Plan TDP Implementation Plan

The implementation plan in Table 9-4 outlines funded and unfunded improvements for MCAT from 2024 through 2033. The table also shows the implementation years for funded improvements based on information available at this time. It is important to emphasize that the implementation 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 9-4: Recommended Plan TDP Implementation Plan

Improvements	Implementation Year	Annual Operating Cost (2024$)	Total Capital Cost	Potential Revenue Source
Service Improvements				
Maintain Existing MCAT Fixed-Route, Paratransit, and Microtransit Services	2024	$12,738,254	$22,724,539	Existing and FDOT Grants
Route 6: 30-Minute Frequency	2024	$670,457	N/A	Existing and FDOT Serv. Dev.
Route 99: 20-Minute Frequency	2024	$603,865	N/A	Existing and FDOT Corridor
Implement Sunday Service: Routes 1, 3, 6, and 99	2028	$289,904	N/A	Existing and FDOT Serv. Dev.
Central Bradenton Circulator	2028	$332,880	$669,591	New Local Funding
Lakewood Ranch North/South MOD	2029	$458,503	N/A	Existing and New Local Funding
Route 203: Two AM and Two PM Trips	2032	$166,438	$731,031	Existing
Lakewood Ranch South/UTC MOD	2033	$910,056	N/A	Existing and New Local Funding
Routes 1, 8, and 16: 30-Minute Freq.	Unfunded	$1,570,450	$3,600,000	Unfunded
All routes: 10PM Weekday Service	Unfunded	$1,562,021	N/A	Unfunded
Ellenton/Parrish MOD	Unfunded	$910,056	N/A	Unfunded
Bradenton to Anna Maria Water Taxi	Unfunded	$662,688	N/A	Unfunded
Capital/Technology/Policy Improvements				
TSP/Queue Jumps	2026	N/A	$1,000,000	Existing and SS4A
Upgrade Major Transfer Stations	2027, 2030-31	N/A	$120,000	Existing
Bus Stop Infrastructure	2024-2033	N/A	$1,502,328	Existing
ADA Improvements	2024-2033	N/A	$1,000,000	Existing
Technology Projects	2024-2033	N/A	$3,147,709	Existing
Professional Services (COA)	2024	N/A	$150,000	Existing
Other Professional Services	2024-2033	N/A	$2,850,000	Existing

10-Year Costs and Revenues Summary

The costs and revenues summaries developed for the MCAT TDP by using these operating/capital cost and revenue assumptions are summarized below. Figures 9-1 illustrates the operating and capital costs for the plan, and Figure 9-2 shows the total costs and revenues for the next 10 years.

Figure 9-1: Total Operating and Capital Costs

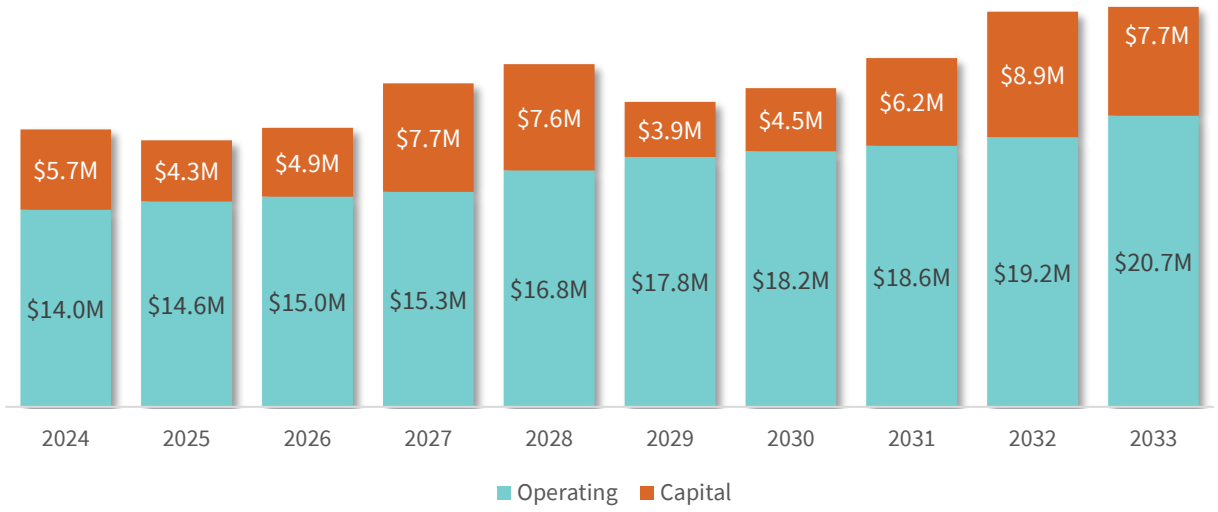
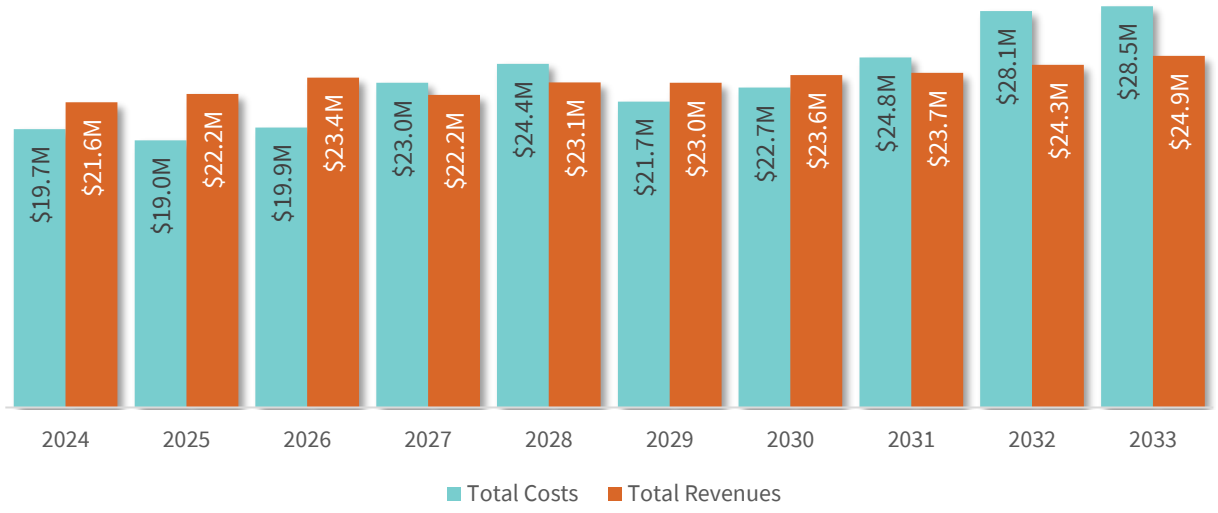


Figure 9-2: Total Costs and Revenues



10.0 Plan Implementation and Coordination

Obtaining the support of decisionmakers who approve the budget required to implement the TDP is only the first step in a longer process of bringing the TDP to fruition. This section provides key elements to consider as MCAT implements its plan to successfully grow the system into the vision that is outlined in the TDP.

Post-Adoption Recommendations

Sudden changes in the operating environment can occur at varying degrees, as seen with the COVID-19 pandemic, thus demonstrating that the TDP adoption does not ensure that implementation will go according to the recommended schedule. The following action items listed below should be carefully considered and followed through to ensure that public support, funding, and operational support are preserved until the next major TDP update.

- Funding "Plan of Action" – Address each recommendation and outline steps to take in the current year and succeeding years to secure the best chance possible of obtaining the needed funding.
- Operational Support – Establish a blueprint to determine how a recommended alternative will be incorporated into the existing network from an operational perspective.
- Progress Beyond Adoption – Use the adopted TDP as a tool to justify and explain the reasons for continued investments to transit services and facilities.
- TDP APR – Use updates to provide needed motivation to reiterate the benefits of the recommended alternatives.

Implementation Plan of Action

Continued Marketing/Outreach

Promoting the TDP after adoption will improve the likelihood of achieving the implementation plan. MCAT has already conducted extensive public outreach as part of the TDP process that can be expanded to market other planning efforts, such as service initiation efforts, marketing programs and campaigns, and budget plans.

Include targeting meetings, activities, events, and other venues at which to share the Executive Summary and provide details of the planned transit growth to educate the community and leaders while keeping the momentum of the TDP process and effort fresh and moving ahead. These may include homeowner/senior/community associations, civic clubs, service organizations, elected and/or appointed boards or committees, public events or festivals, and/or other locations as identified.

Role of Executive Summary

Promotion of the TDP should extend beyond the adoption of the TDP. The MCAT TDP Executive Summary, which will be completed after plan adoption, should be used as a promotional tool and an effective medium to continue generating support for the TDP's recommendations.

Motivate Using TDP Annual Progress Report

The TDP APR is another tool to help keep the TDP major update a "living document." As it is an FDOT requirement, an APR can be used for each of the next four years to keep this TDP alive and provide the needed motivation to reiterate the benefits of the recommended alternatives.

Building on TDP Efforts/Relationships

Throughout the TDP public involvement process, MCAT identified advocates while educating the public overall and can leverage these relationships to continue building support for the implementation strategies. These individuals may serve as facilitators for a "grassroots" outreach program or could become transit cheerleaders/ambassadors that can provide a foundation/support network for future outreach. These future efforts can build upon the tools and lessons afforded by the TDP and aid in prioritizing specific target markets to engage.

MCAT's active coordination with regional partners, such as Breeze Transit, has assisted MCAT with building a strong foundation as a trusted mobility source for riders. Continuing to coordinate with FDOT and Breeze Transit staff is key as both have shared goals pertaining to continuing to make transit a truly viable and attractive alternative mobility option. With the increase of frequency to 20 minutes all day on Route 99, regional coordination will be crucial to ensure the success of the service. Furthermore, MCAT should identify and approach major employers to initiate employee commuter programs, help spread the word of new services, and/or other commute options to improve access to current and emerging jobs.

Secure Funding

Manatee County has put forth significant efforts to improve and promote transit in the county by becoming fare-free. In discussions during the TDP outreach process, stakeholders were supportive of remaining fare-free and expanding to new service types. Making sure the necessary funding is available each year to maintain and add any new services or facilities programmed in the TDP implementation plan is key to the success of this transit plan. While the TDP implementation schedule does not preclude MCAT the opportunity to delay or advance any projects, MCAT should put its best efforts into staying on schedule.

FDOT's commitment to enhancing mobility strategies to develop major connected corridors with transit operations, transforming passenger terminals into mobility hubs with a wide range of modal options, and first/last mile connections allows MCAT an opportunity to partner with FDOT to secure State and Federal funds to help support similar strategies in its TDP. MCAT should continue to identify potential grants and apply for funding to implement transit alternatives, and use the information provided in the TDP to develop project applications, including defining/describing the projects, justifying needs, providing service and operational parameters, outlining a proposed budget, and providing performance measures.

Plan Coordination/Integration

In the future, MCAT should consider coordination of the TDP major updates with other planning efforts:

- ***Conduct a COA*** – With implementation of fare-free transit, it is recommended that MCAT consider a service efficiency assessment in 1-2 years and repeat it at least every 5 years to maintain operational health. This effort will assist transit operations to be more effective and efficient across the network. Especially in light of COVID and the post-pandemic era, such efforts in operational planning are warranted to foster real growth and recovery.
- ***Coordination with Other Plans*** – Ensuring consistency with key State, regional, and local plan priorities should be a primary focus of MCAT.
- ***Informing Other Plans*** – The analyses completed during the TDP can be used to help update required plans for ADA access and Title VI service provisions, as it documents how the system will meet or serve older adults, persons with disabilities, and populations that fall under Title VI protections. The adopted TDP can also be useful for other entities with subsequent planning efforts, such as local comprehensive plans, plans to develop affordable housing, and Florida's Strategic Intermodal System (SIS) Needs Plan.

Appendix A. Farebox Recovery Report

MCAT ANNUAL FAREBOX RECOVERY REPORT

BRADENTON, FLORIDA

June 2023

CURRENT FAREBOX RECOVERY RATIO

The farebox recovery ratio (FRR) for MCAT, the public transportation provider for Manatee County, was 6% for all fixed-route services in fiscal year (FY) 2021.

PRIOR YEAR FARE STUDIES AND CHANGES

The last MCAT fare change was implemented November 1, 2022. As a result, the system is fare free. Prior to the fare-free program, MCAT had a regular bus fare of $1.50 for all routes except for the Anna Maria Trolley, a discount bus fare of $0.75 for seniors ages 60 to 79, persons with a disability, students, Medicare recipients, active-duty military personnel and veterans. Seniors over 80 years old and children under 5 years old were able to ride for free.

STRATEGIES THAT WILL AFFECT THE FAREBOX RECOVERY RATIO

The agency plans to revisit this fare policy in 2024 to see if they can remain fare-free long term. The 2024-2033 TDP Major Update identifies strategies that will be used to maintain or increase the farebox recovery ration if fares are re-instated, including the following:

- Monitor key performance measures for individual fixed-routes.
- Ensure that transit serves major activity centers, potentially increasing the effectiveness of service.
- Continue to transition Transportation Disadvantaged (TD) and ADA passengers to fixed-route services, as feasible, to increase ridership.
- Increase ridership through enhanced marketing and community relations activities.
- Provide local employers with incentives for transit use.
- Provide convenient locations for bus passes to be purchased.
- Monitor opportunities to secure additional funding to improve frequencies on existing routes to make service more attractive to new riders.
- Conduct on-board surveys at least every four years to gather information on how to make services more convenient and useful to patrons.
- Complete ongoing preventative maintenance activities and repair/replace fareboxes as needed to ensure the fare collection equipment is performing at optimum capacity.
- Coordinate with Breeze Transit to implement regional fares.

Appendix B. Other Transportation Providers

Table B- 1: Other Transportation Providers

Provider	Types of Services Provided					Fare Structure	Type of Vehicles	Phone
	General Service Area (Counties)	Eligible Purposes	Eligible Riders	Days	Hours			
American Cancer Society Transportation Program	Statewide	Medical	Cancer Patients	Mon-Fri	8:00 AM – 6:00 PM	Varies; Depending on need, discount vouchers are available	Car, Taxi	(800) 872-7245
ALD Limo	Manatee, Sarasota, Hillsborough, Pinellas, Charlotte, Miami-Dade	All	All	Mon-Fri	5:00 AM – 12:00 AM	Varies	Luxury Car, SUV, Limo	(941) 925-9535
Amtrak	Statewide	All	All	Mon-Sun	24/7	Varies; Seniors 62 or older and/or disabled -15% discount	Metro-Rail	(800) 872-7245
Apollo Medical Transport	Manatee, Sarasota	Medical	Disabled, Elderly, Private Pay Consumer	Mon-Sat	7:00 AM – 7:00 PM	Varies	Van	(941) 685-8130
Assisted Ride	Manatee	Medical	Disabled, Elderly, Private Pay Consumer	-	-	Varies	Van	(941) 757-3339
Beacon of Light Transportation	Manatee, Pinellas, Hillsborough, Sarasota, Orange	All	Private Pay Consumer	Mon-Sat	5:30 AM – 11:00 PM	Varies, Metered, Flat Rate, Long Distance Rate	Minivan, Taxi, SUV, Limo	(813) 493-0051
Bruce's Taxi Service	Manatee, Pinellas, Hillsborough, Sarasota	All	Private Pay Consumer	Mon-Sun	24/7	Flat fee of $6.00 and $2.40 for each add'l mile charged in .2 mi increment	Taxi	(941) 755-6070

Table B-1: Other Transportation Providers (continued)

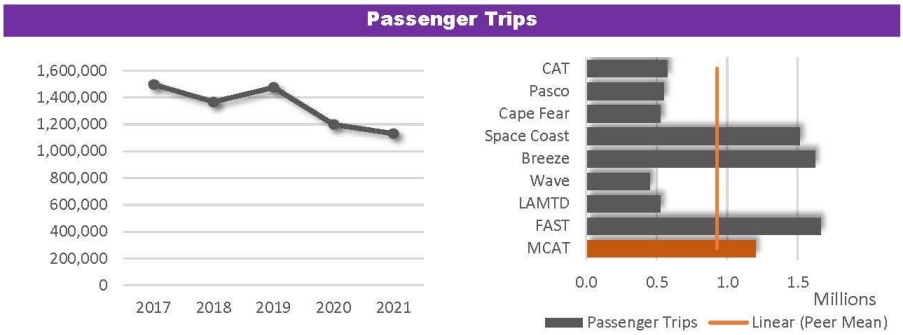
Provider	Types of Services Provided					Fare Structure	Type of Vehicles	Phone
	General Service Area (Counties)	Eligible Purposes	Eligible Riders	Days	Hours			
Byrd Transportation & Concierge Services	Manatee	All	Private Pay Consumer	Mon-Fri	6:00 AM-5:00 PM	Varies	Car	(941) 548-6794
Doctors Transport Service	Manatee County	Medical	Cancer Patients, Disabled, Elderly, Private Pay Consumer	Mon-Sun	Weekdays 5:00 AM – 9:00 PM Weekends 8:00 AM – 5:00 PM	Need Based, Same-city roundtrip with wheelchair is $69.00	Van	(941) 924-4990
Florida Shuttle Services	Manatee, Orange, Miami-Dade	Recreation	Private Pay Consumer	Mon - Sun	5:30 AM – 8:00 PM	Varies by distance	Mini-Bus	(321) 250-2820
I Caregiver LLC	Manatee	All	Private Pay Consumer	Mon-Fri	8:00 AM – 4:00 PM	Varies by distance and accommodation for wheelchair	SUV	(941) 286-7745
Lexi Medical Transport	Manatee	Medical	Private Pay Consumer	Mon-Fri	-	Varies by distance	Van	(941) 264-8528
Manasota Care Services	Manatee, Sarasota	Medical	Disabled, Elderly, Private Pay Consumer	Mon-Sun	24/7	Varies by distance	Van	(941) 900-8808
Martz Bus	Manatee, Pinellas, Hillsborough, Orange	Recreation	Private Pay Consumer	Mon-Sun	24/7	Varies by distance and bus type	Bus	(800) 282-8020
Med-Quest Transit	Manatee	Medical	Private Pay Consumer	Mon-Fri	8:00 AM – 5:00 PM	Varies by distance	Van, SUV	(941) 518-6526
Medi Redi Transport LLC	Manatee	Medical, Recreation	Cancer Patient, Disabled, Elderly, Private Pay Consumer, Veterans	Mon-Sat	5:00 AM – 6:00 PM	Wheelchair/Ambulatory- Up to 10 miles $40.00 One Way, $60.00 Round Trip; + 2.50 each additional mile over 10 miles; Stretcher/Gurney - Up to 10 miles $100.00 One Way; $150.00 Round Trip; + 3.50 each additional mile over 10 miles	Van	(941) 417-7979

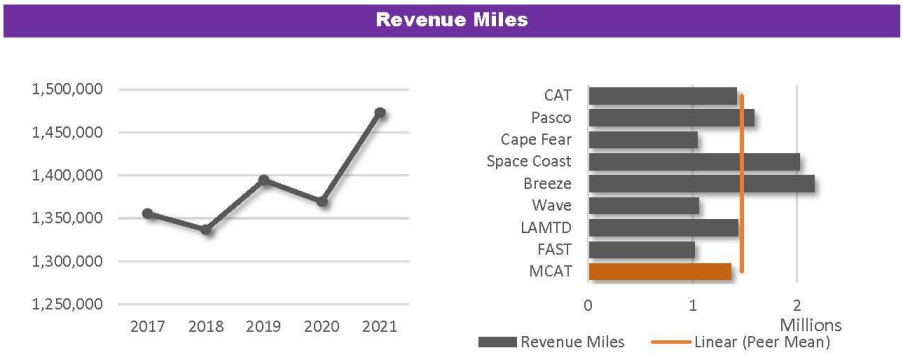
Table B-1: Other Transportation Providers (continued)

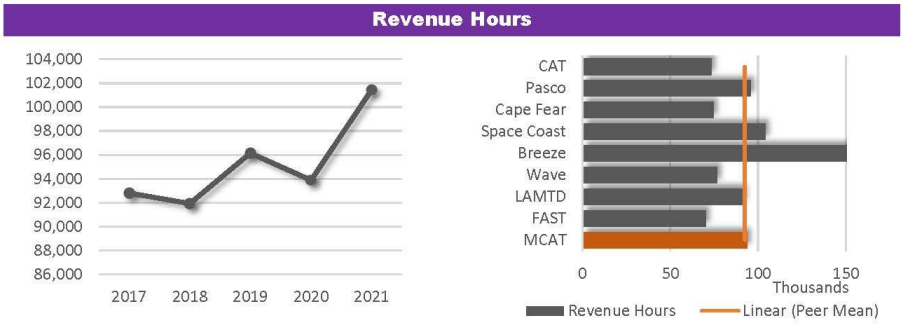
Provider	Types of Services Provided					Fare Structure	Type of Vehicles	Phone
	General Service Area (Counties)	Eligible Purposes	Eligible Riders	Days	Hours			
Metro Medical Transport	Statewide	Medical	Disabled, Elderly, Private Pay Consumer	Mon-Sun	24/7	Varies by distance	Van	(941) 322-1888
MobilityWorks	Statewide	Recreation	Disabled	Mon-Fri	8:00 AM – 5:00 PM	Between $90 and $180 per day, $300 per weekend	Van	(877) 275-4915
Rapid Ride	Manatee	All	Disabled, Elderly, Private Pay Consumer, Veterans	Mon-Sun	24/7	Varies by distance and accommodation	Car, Van	(941) 545-2178
Rapid Wheelchair & Stretcher Transport	Manatee, Hillsborough, Pinellas	Medical, Recreation	Disabled, Elderly, Private Pay Consumer	Mon-Sun	5:00 AM – 8:00 PM	Varies by distance	Van	(941) 812-3084
Ride Safe Transport	Manatee, Broward, Palm Beach, Miami-Dade	Medical	Private Pay Consumer	Mon-Sun	5:00 AM – 12:00 AM	Varies by distance	Van	(786) 398-3427
Uber	Statewide	All	All	Mon-Sun	24/7	Varies by distance	Car, Van	Phone App
Veterans Limo Airport Transportation & More	Manatee	Recreation	Elderly, Private Pay Consumer, Veterans	Mon-Sun	24/7	Varies by distance	Car, Mini-Bus, Van	(813) 264-6666
Wheelchair Transport Service	Manatee, Sarasota, Lee, Pinellas, Hillsborough	All	Elderly, Private Pay Consumer, Veterans	Mon-Sun	24/7	Varies by distance, price can be covered by Medicaid and other programs	Multiple Modes	(727) 586-2811

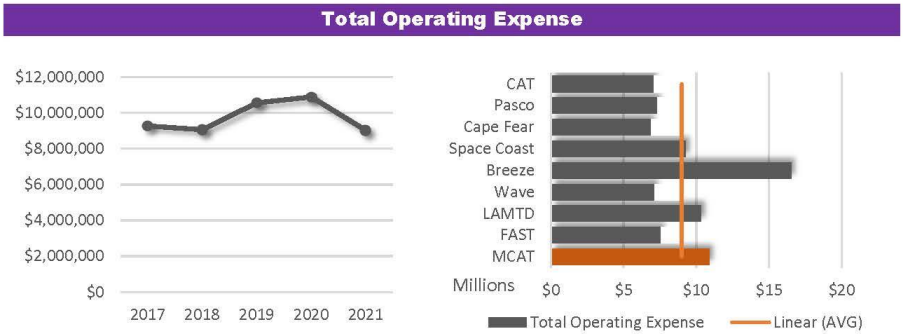
Appendix C. Trend & Peer Analysis

Appendix C. Peer and Trend Analysis

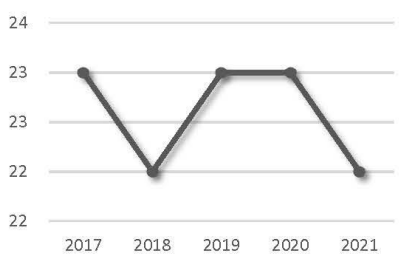


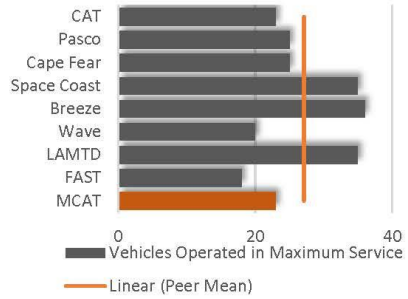




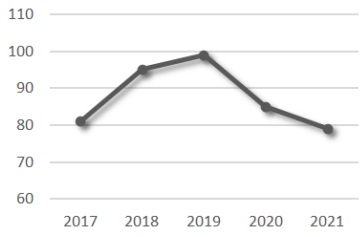


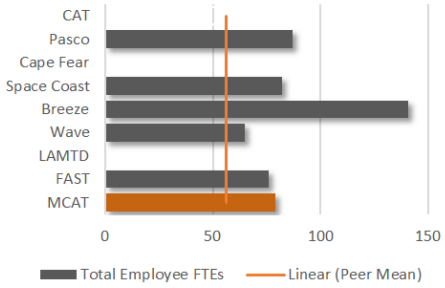
Vehicles Operated in Maximum Service



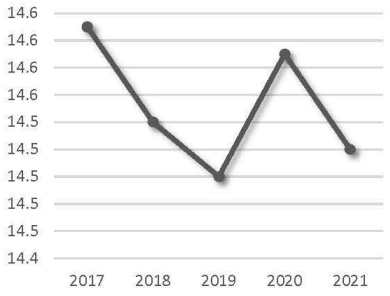


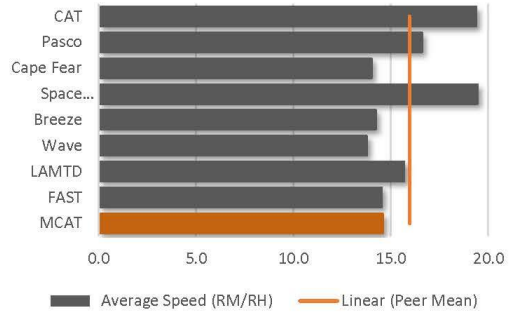
Total Employee FTEs



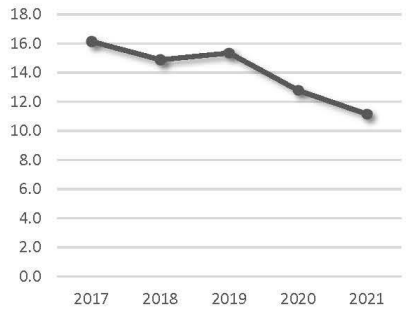


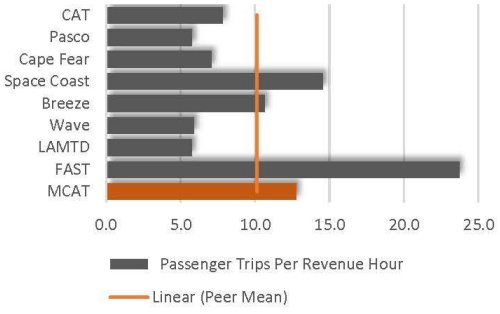
Revenue Miles per Revenue Hour



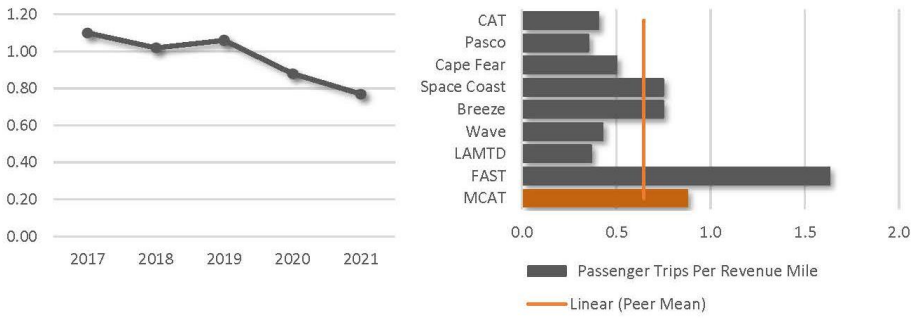


Passenger Trips per Revenue Hour

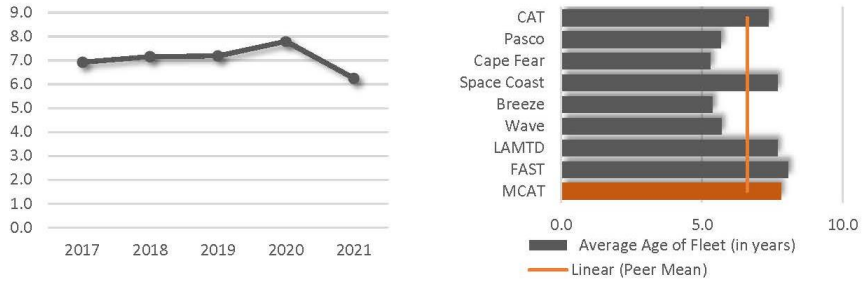




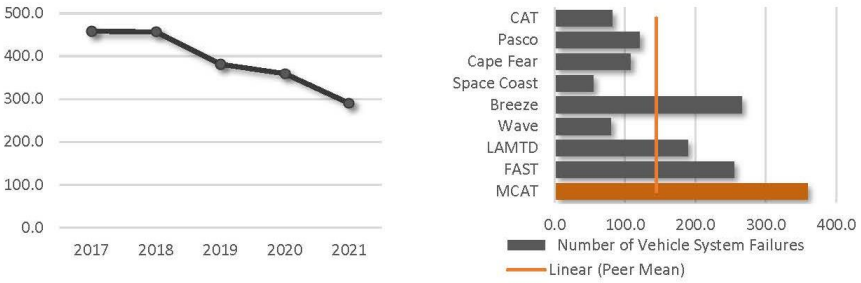
Passenger Trips per Revenue Mile



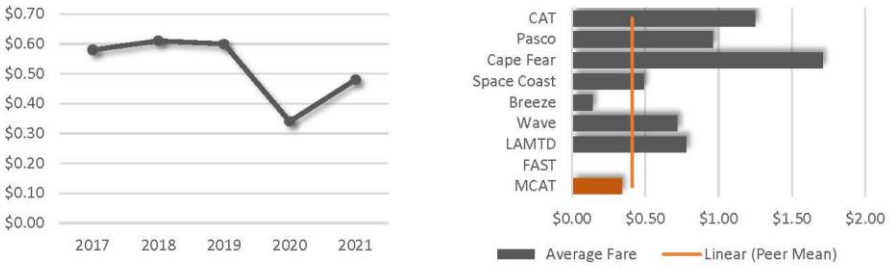
Average Age of Fleet



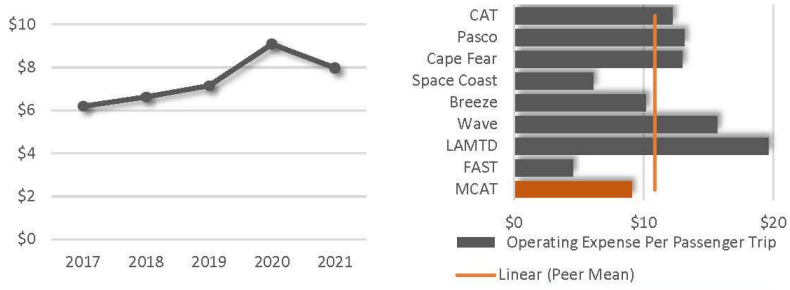
Number of Vehicle System Failures



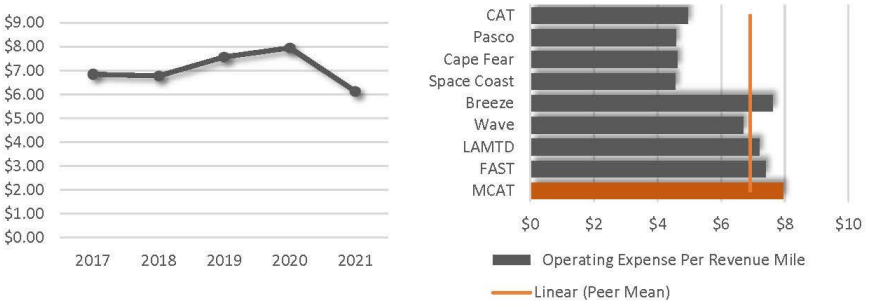
Average Fare



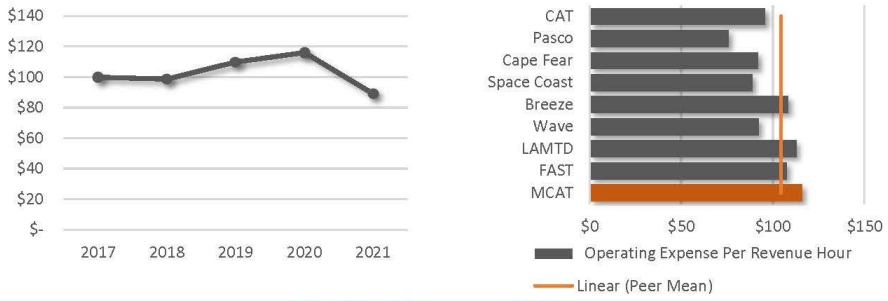
Operating Expense per Passenger Trip



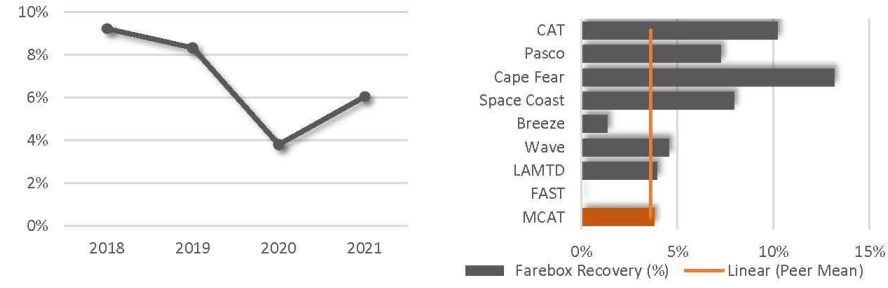
Operating Expense per Revenue Mile



Operating Expense per Revenue Hour



Farebox Recovery (%)



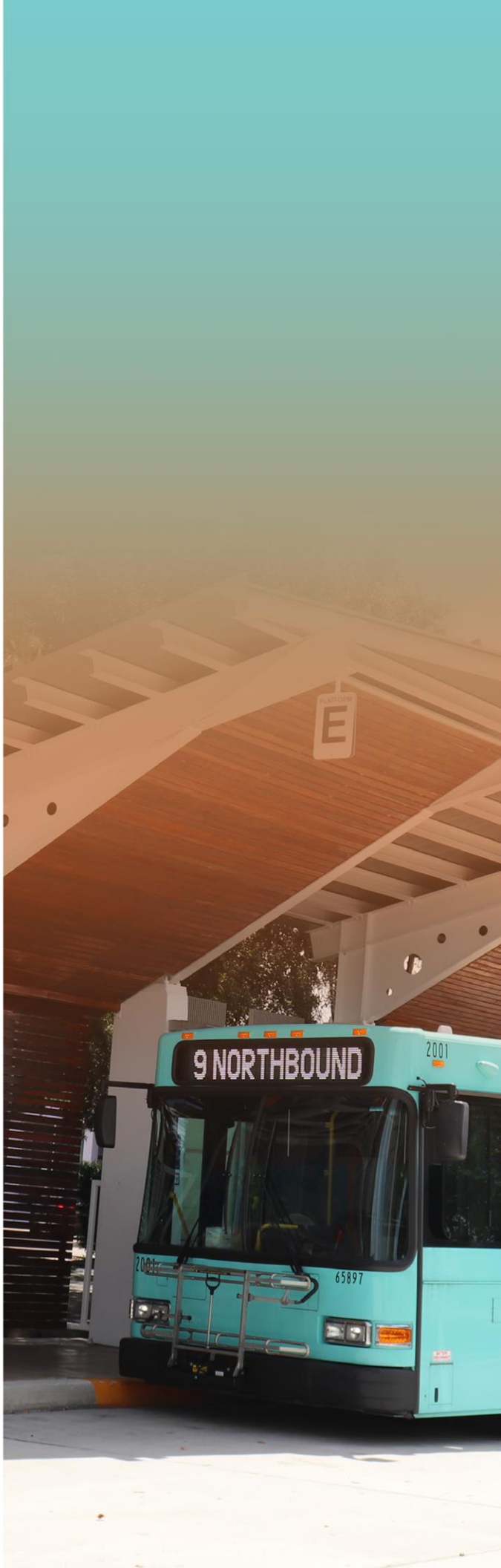
Appendix D. Public Involvement Plan & Outreach Materials

Manatee County Area Transit (MCAT)

2024-2033 Transit Development Plan

Public Involvement Plan

November 2022



Prepared by

benesch

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1 Introduction

The Manatee County Board of County Commissioners (BCC), through the Manatee County Public Works Department/Transit Division, provides public transportation in Manatee County through Manatee County Area Transit (MCAT). MCAT provides fixed route bus service, complementary paratransit service (as required under the Americans with Disabilities Act [ADA]), and mobility-on-demand services.

MCAT is preparing an update of its Transit Development Plan (TDP) to guide the development of the transit system over the next 10 years. As a recipient of Florida Department of Transportation (FDOT) Block Grant funding, MCAT must update its 10-year TDP every 5 years; therefore, this update will cover the FY 2024-2033 planning horizon.

This Public Involvement Plan (PIP) serves to guide the public outreach efforts for MCAT's TDP update process. It also identifies recent public outreach efforts undertaken by other agencies, the results of which will be reviewed and integrated into the TDP as appropriate.

Public Involvement Plan Purpose

This PIP has been developed in accordance with Florida Rule 14-73.001, which requires that the TDP preparation include the following activities:

- A PIP approved by FDOT. As an alternative, the local metropolitan planning organization's Public Involvement Plan (PIP), approved by both the Federal Transit Administration (FTA) and the Federal Highway Administration (FHWA) can be used to guide the TDP public involvement process. The Sarasota/Manatee Metropolitan Planning Organization (MPO) serves as the metropolitan planning organization for Manatee County. This PIP has been prepared consistent with Sarasota/Manatee MPO's PPP.
- Description of the process used, and the public involvement activities undertaken for the TDP.
- Solicitation of comments from FDOT, the MPO, and the local Workforce Development Board (i.e., CareerSource Suncoast) on the mission, goals, objectives, alternatives, and 10-year implementation program.
- Notification of outreach activities and effort to FDOT, the MPO, and the Workforce Development Board.

To ensure that MCAT meets these requirements, this PIP will facilitate a public involvement process for the TDP effort that will encompass a range of activities that provide ample opportunity for participation by the required, and other interested, entities.

It should be noted that the PIP is written such as to match the scope of services, while also providing the greatest flexibility possible as the TDP is being developed. While the types of activities are generally set, the exact time frames, formats, or quantities may change to allow MCAT to accomplish the best results with the resources made available for this aspect of the TDP update process.

Public Involvement Objectives

In addition to producing a compliant TDP, the PIP has been designed to ensure that the resulting 10-year plan will provide meaningful outcomes to the communities within MCAT's service area by:

- Providing a multi-faceted communication model that will keep the public, including both current riders and non-riders, and all stakeholder groups informed about the status of the project.
- Clearly defining the TDP purpose and objectives early in the process.
- Identifying and documenting the concerns, issues, and needs from the key stakeholders.
- Providing stakeholders with baseline information about MCAT and keep them fully informed throughout the study.
- Encouraging participation of all stakeholder groups within the project area while paying special attention to underserved communities.
- Using established community infrastructure (i.e., farmer's markets, shopping centers, public transit transfer centers, etc.) as an opportunity to engage the community in-person.
- Providing frequent opportunities and a consistent access point for community input.
- Identifying tools to gather information from stakeholders who cannot participate in meetings, such as via email, online surveys, etc.

Title VI Compliance

In accordance with MCAT's Title VI Program, ensuring meaningful participation of minority and low-income populations throughout the TDP process is a major objective of this PIP. The following steps will be taken to provide meaningful access and participation of Title VI protected populations.

- Stakeholder interviews, discussion groups, and meetings will be conducted with organizations and qualified representatives that can articulate the transportation needs of low-income, minority, and transportation disadvantaged populations.
- Meeting locations and times will be sensitive to the needs of each community to ensure access and participation by as many people as possible, including being located with convenient access to MCAT bus stops.
- TDP outreach materials and documentation will be available online and in printed form, where appropriate. Materials will be evaluated for translation into Spanish based on the audience needs and available resources, consistent with the agency's Language Assistance Plan.
- Translators for Spanish-speaking residents will be available at outreach events, where appropriate.

Project Team

Project Management Team

The Project Management Team will manage the project on behalf of MCAT and provide strategic direction and approval to the Consultant Team. The Project Management Team members, listed

in Table 1-1, will coordinate with the Consultant Team regularly, approve major deliverables, and oversee the project's progression

Table 1-1: MCAT TDP Project Management Team

Name	Title
Susan Montgomery	Transit Planner/TDP Project Manager
Jason Harris	Transit Division Director
Josh Wanbaugh	Operations Chief

Consultant Team

The Consultant Team will conduct day-to-day study activities and manage the study schedule and budget. The Consultant Team is led by Benesch and includes Quest Corporation of America, Inc. (QCA), Rapid Staffing, and KPFF. Sarah Goolsby will serve as the Consultant Project Manager. As the Consultant Team's representative, she will report to MCAT's Project Management Team and communicate with the agency's Project Manager on a regular basis.

2 TDP Public Involvement Activities

This section presents the variety of public outreach activities selected to ensure the active participation of Manatee County residents, current riders and non-riders, employees, and visitors. The activities include engagement of community stakeholders that interact directly with population groups that represent different perspectives, including but not limited other public agencies, business/economic development, health, diversity, and current MCAT operators.

TDP Review Committee

To ensure the project proceeds in adherence with local objectives and needs, an Advisory Review Committee (ARC) will be formed to assist the Project and Consultant Teams with reviewing and providing comments on all major TDP deliverables. The ARC will comprise the Project Team (MCAT staff and consultant), a local Workforce Development Board (CareerSource) representative, an FDOT District 1 representative, and other agencies/staffs as necessary will be established to monitor and provide input throughout the study and to evaluate deliverables.

The following ARC meetings are planned in 2022/2023 to support the development of this TDP:

- December 2022 (Date TBD): Review the project scope and TDP goals and objectives and the PIP; discuss public transit needs; introduce Tech Memo #1.
- March 2023 (Date TBD): Summarize initial outreach findings; confirm public transit needs and preliminary alternatives.
- Late May/Early June (Date TBD): Review components of draft TDP (e.g., situation appraisal, goals/objectives, and the 10-year financial/service plan).

Rider Survey

An on-board rider survey will be conducted to obtain information related to the demographics, attitudes, preferences, travel behavior, and mobility needs of MCAT fixed-route and Mobility-on-Demand (MOD) services. This survey is designed to serve as a market research tool and not be specifically geared for model input or validation. The information collected will be included in the TDP's public involvement documentation, and the results used to support the needs identification process and subsequent alternatives analysis assessment. All fixed routes and MOD zones will be sampled sufficiently to cover typical weekday and Saturday service and ensure that at least 1,000 total surveys are collected.

Stakeholder Interviews

Since the understanding of local conditions should include knowledge of the perceptions and attitudes of community decision-makers and leaders towards transit, interviews of key community stakeholders will be conducted for the TDP. The Consultant Team will work with the Project Management Team to identify the appropriate individuals to interview. The Consultant Team will then schedule and conduct the interviews using an interview script that will be developed and submitted to MCAT for review prior to the first interview.

Table 2-2 provides the initial list of stakeholders identified to be contacted for these interviews. The list will be modified as necessary and the final list of stakeholders, along with the input received, will be documented in the TDP.

Table 2-1: Planned Stakeholder Interview Participants

Stakeholder/Agency
James Satcher, First Vice Chair, County Commission District 1
Reggie Bellemy, County Commissioner District 2
Kevin Van Ostenbridge, Chairman, County Commission District 3
TBD, County Commissioner District 4
Vanessa Baugh, County Commissioner District 5
TBD, Third Vice Chair, County Commissioner At Large
George Kruse, Second Vice Chair, County Commissioner At Large
Dr. Scott Hopes, Manatee County Administrator
Rob Perry, Bradenton City Administrator
Manatee County Chamber of Commerce
Terri Kinder, President, AMI Chamber of Commerce
Clarke Davis, Manager of Transportation Planning, Manatee County
Tom Harmer, Longboat Key Town Manager
Shirley Groover Bryant, Mayor, Palmetto
Jane Grogg, Director, Sarasota County Area Transit
Judy Titsworth, Mayor, City of Holmes Beach
Dan Murphy, Mayor, City of Anna Maria

Public Online Survey

Online surveys are conducted during the TDP process to understand the needs and concerns of persons who cannot participate in other outreach events. Online surveys are also an efficient way to capture input from participants with various perspectives, including current riders, non-riders, residents, employees, and visitors to Manatee County. As part of the public involvement effort, an online survey will be conducted to gather information related to transit needs in Manatee County. Input from this survey will be reviewed to identify pertinent information and incorporated into the TDP process, as appropriate.

Once preliminary transit needs have been identified, a subsequent online survey will be conducted for this TDP to help refine and prioritize the potential service alternatives for inclusion in the 10-year plan. The survey will be posted on MCAT's website and distributed via email and social media outlets available to the agency. To further encourage participation in the survey process and to create convenient access to the online format, business cards with survey information and QR codes to direct participants to the survey URL. The QR codes will be distributed throughout the public involvement process to help generate interest and increase participation, likewise, persons attending other outreach activities within the same timeframe will be invited to take the survey.

Discussion Group Workshops

To obtain additional public input for the TDP process, two TDP-specific discussion group workshops will be held. The discussion groups will be invitation-only and include 12-20 participants to provide an intimate meeting setting that permits more in-depth discussion about both general and specific issues and needs. A variety of techniques will be used to encourage participation and elicit perceptions, ideas, preferences, and other input that is important to inform the TDP process. This includes engaging in open-ended discussions with workshop attendees and evaluating their attitudes and perceptions to transit related topics. Thoughts and concerns presented during group workshops will be discussed further and considered throughout the remaining public involvement process.

Workshop candidates include members from various communities in the region, to involve demographics that may not be represented in other TDP outreach initiatives and to broaden the overall range of input received.

Table 2-3 provides the list of stakeholder agencies/organizations that will be contacted to participate in the discussion group. The list will be modified as necessary and the final list of participants, along with the input received, will be documented in the TDP.

Table 2-2: Planned Discussion Group Participants

Organization
Manatee County Health Department
Manatee County Libraries
Manatee County Parks & Natural Resources
Port Manatee
211 Suncoast
Manatee County Aging Services
Blake Medical Center
Manatee HealthCare Alliance
MCAT Bus Operators
State College of Florida, Manatee-Sarasota
Manatee Technical College
MCAT Operators/Supervisors
Salvation Army
Turning Points
Centerstone

Public Workshops

A series of public workshops will be held as “pop-up events” during the TDP process with the primary focus to educate participants about the TDP process and collect comments and input on gaps in the transit system and unmet mobility needs. The Consultant Team will coordinate with MCAT staff to plan and schedule pop-up events and public workshops as needed. To ensure

diversity among participants and collect a high level of feedback, a variety of locations will be selected to execute pop-up events throughout the region. Pop-up events allow for informal participation from pedestrians and business patrons; suggested locations for pop-up sessions include:

- Transfer Stations
- Flea Markets
- Farmers Markets
- Anna Maria Island Pier
- Coquina Beach
- Detweiler Grocery
- Hunsader Farms
- Various Walmart Locations - SR 70, Cortez, Palmetto, SR 64

As feasible, the meetings will be held at different times (day and evening) to allow a broad range of feedback from various demographics and social groups.

Social Media & Website

MCAT will provide TDP-specific information on its website to provide the public with updates on the TDP, including information about outreach opportunities. The Consultant Team will provide the webpage content to the agency to upload to its website.

The Consultant Team also will develop social media content and coordinate with MCAT, Sarasota/Manatee MPO, and other stakeholders on using their respective social media platforms to reach interested parties.

Public Outreach Documentation

This PIP and all public involvement activities undertaken to execute this plan, as well as outcomes from such efforts, will be summarized and documented in the final TDP report.

3 Public Involvement Activity Schedule

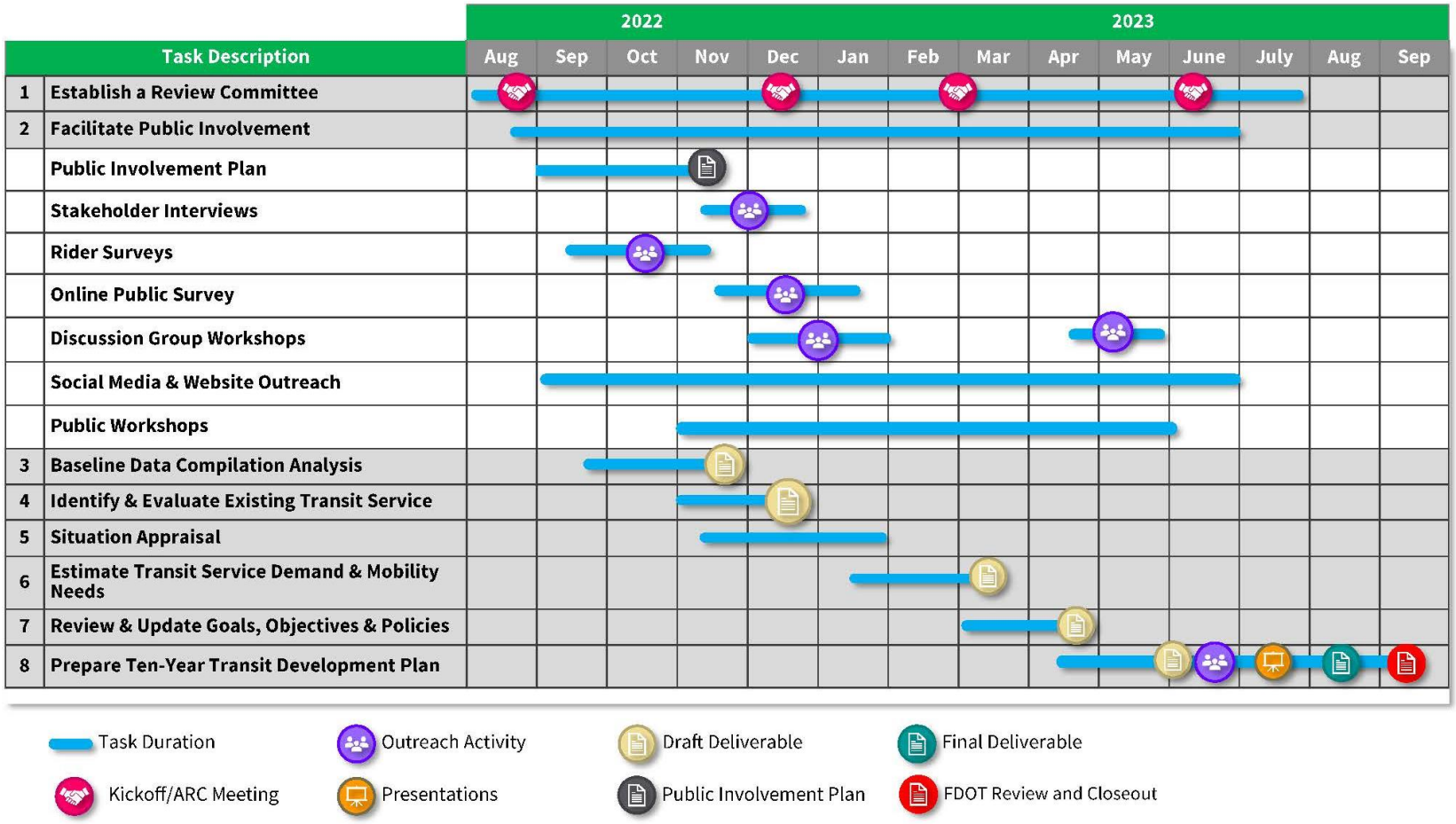
A public involvement activity schedule has been developed to ensure completion and approval of the TDP by Manatee County by September 1, 2023. Table 3-1 presents the tentative schedule for the public involvement activities included in the TDP.

The overall schedule for the TDP, which shows the timeline for outreach activities as well as other components of the TDP, is shown in Figure 3-1.

Table 3-1: Tentative TDP Public Involvement Activity Schedule

TDP Outreach Activity	Timeframe
TDP Review Committee Meeting #1	December 2022
TDP Review Committee Meeting #2	March 2023
TDP Review Committee Meeting #3	May/June 2023
Stakeholder Interviews	November/December 2022
Discussion Group Workshop #1	December 2022/January 2023
Discussion Group Workshop #2	April/May 2023
Onboard Survey	October 2022
Online Survey	December 2022 – January 2023
Public Workshop Pop-Up Events	December 2022 – April 2023
Social Media/Website Outreach	November 2022 – June 2023

Figure 3-1: MCAT TDP Major Update – Overall Schedule



Manatee County Area Transit (MCAT) Bus Rider Survey

Your input is necessary to help improve public transit service, so please complete this important survey. Thank you.

1. How often do you ride the bus? (Please ✓ only one)

1__ 4 or more days per week
2__ 2 or 3 days per week
3__ About 1 day per week
4__ Once every _____ weeks

2. How long have you been using MCAT bus service? (Please ✓ only one)

1__ First-time rider
2__ Less than 6 months
3__ 6 months to a year
4__ 1 to 2 years
5__ More than 2 years

3. What three **SERVICE IMPROVEMENTS** would make MCAT better for you to use? (Please ✓ **THREE**)

1 ___ More frequent service on existing routes
2 ___ More service on Sundays
3 ___ Later evening service on existing routes_____ (specify until what time)
4 ___ New routes/service. Where? _____
5 ___ Express service. Where? _____
6 ___ Better connections to other counties. Where?_____
7 ___ More benches and shelters at bus stops Where?_____
8 ___ More bike racks at bus stops Where?_____
9 ___ Better sidewalk connections to bus stops
10___ Improved lighting at stops
11___ Other (specify)_____

4. How many months out of the year do you reside in Manatee County?

1__ Less than 6 months
2__ 6 months to 1 year
3__ Permanent resident

5. Do you use or own a **CELL PHONE**?

1__ Yes, it's a smartphone with a data plan / internet connectivity
2__ Yes, but I have no data plan / Wi-Fi capability
3__ No

6. Do you have a personal bank account or credit card?

1__ Yes
2__ No

7. How do you get MCAT route schedule information? (Please ✓ **all that apply**)

1__ Google
2__ County website
3__ Printed schedules
4__ Transit stations
5__ Calling MCAT
8__ Other (specify) _____

8. Please ✓ the starting place of this **ONE-WAY TRIP** (Please ✓ only one)

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

9. How do you usually get to and from the bus stop? (Please ✓ only one)

1__ Walk
2__ Bicycle
3__ Drive & Park
4__ Dropped off by friend/Family
5__ Rideshare service (uber, lyft, etc.)
6__ Other (Specify)_____

10. How long does it usually take to get to and from the bus stop? (Please ✓ only one)

1__ Less than 5 minutes
2__ 6-15 minutes
3__ 16-25 minutes
4__ 25+ minutes

11. Do you make a **TRANSFER** on this trip?

1__ Yes
2__ No

12. Please ✓ the ending place of this **ONE-WAY TRIP** (Please ✓ only one)

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

13. Do you have a driver's license?
1__ Yes
2__ No

14. If not by bus, how would you make this trip? (Please ✓ only one)

1__ Could not take trip
2__ Ride with family/friend
3__ Walk
4__ Bicycle
5__ Uber/Lyft/Taxi
6__ Drive

15. If the technology becomes available in the future, which of the following technology improvements would make MCAT easier for you to use? (Please ✓ **Three**)

1__ Real-time schedule information on busses
2__ Real-time schedule information at terminals
3__ Wireless internet on buses
4__ Digital kiosks at transit stops
5__ Other (Specify) _____

16. Do you speak a language other than English at home?

1__ No
2__ Yes (specify language): _____

17 How satisfied are you with MCAT service?

Circle a score where 1 is the **LEAST** satisfied and 10 is the **MOST** satisfied

Least 1 2 3 4 5 6 7 8 9 10 Most

18. Your age is? (Please ✓ only one)

1__ Under 18
2__ 18 to 24
3__ 25 to 44
4__ 45 to 59
5__ 60 to 79
6__ 80 years or older

19. What was the range of your total household income for 2017? (Please ✓ only one)

1__ Under $10,000
2__ $10,000 to $19,999
3__ $20,000 to $29,999
4__ $30,000 to $49,999
5__ $50,000 to $74,999
6__ $75,000 or more

20. Are you male or female? 1__ Male 2__ Female

21. Are you of Hispanic, Latino, or Spanish origin? 1__ Yes 2__ No

22. What is your race? (Please ✓ only one)

1__ American Indian or Alaska Native
2__ Black/African American
3__ White
4__ Asian
5__ Native Hawaiian or Other Pacific Islander
6__ Two or more races
7__ Other (specify) _____

23. How satisfied are you with each of the following? (circle a score for each item listed)

	Very Satisfied		Neutral		Very Unsatisfied
A. The frequency of the bus service	5	4	3	2	1
B. How long is take to make this trip by bus	5	4	3	2	1
C. The number of time you have to change buses	5	4	3	2	1
D. The availability of bus schedule information	5	4	3	2	1
F. The availability of sidewalks at bus stops	5	4	3	2	1
G Your safety on the bus and at bus stops	5	4	3	2	1
H. Your ability to get where you need by bus	5	4	3	2	1
I. Your overall satisfaction with MCAT	5	4	3	2	1
J. Satisfaction with current fare prices	5	4	3	2	1

24. Please add any other comments or suggestions for MCAT Service:

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

THANK YOU FOR COMPLETING THE SURVEY!

MCAT
MANATEE COUNTY AREA TRANSIT

Or scan here with your phone to take the survey online!

Transit Development Plan – Major Update
Public Input Survey

Manatee County Area Transit (MCAT) is conducting a public input survey for the 10-Year Transit Development Plan (TDP) Major Update. Please answer the following questions to help us understand how we can better meet the County's transit needs over the next 10 years!

1. **Have you or a member of your household used MCAT fixed-route or Handy Bus services?**
   - ☐ Yes, fixed-route
   - ☐ Yes, Handy Bus
   - ☐ Yes, both
   - ☐ No

2. **Do you think there is a need for additional/improved transit services in Manatee County?**
   - ☐ Yes
   - ☐ No

3. **How important is providing transit services in Manatee County?**
   - ☐ It must be provided
   - ☐ It might be useful
   - ☐ It does not matter to me
   - ☐ It is not needed

4. **If you use MCAT services, or decide to use them in the future, where would you use MCAT to go? (Select up to THREE)**
   - ☐ Work
   - ☐ Shopping/Errands
   - ☐ Social/Recreational
   - ☐ Education/College
   - ☐ Medical Appointments
   - ☐ Religious
   - ☐ Other: _____

5. **If you answered 'No' to Question 1, what is the MAIN reason you do not use MCAT transit services?**
   - ☐ Driving is more convenient/faster
   - ☐ It does not go where I need to travel
   - ☐ It does not go when I need to travel
   - ☐ I do not know much/anything about it

6. **What would make transit services more appealing for you to use it or use it more?**
   - ☐ 30-minute service on existing routes
   - ☐ New routes/service. Where? _____
   - ☐ Later evening service on existing routes. Until what time? _____
   - ☐ Sunday Service
   - ☐ Technology based on-demand transit option
   - ☐ Wi-Fi on buses and at stations
   - ☐ Other: _____

7. Would you use a ferry/water taxi service to Anna Maria Island?

- ☐ Yes
- ☐ No

8. How would you like to access public transit information?

- ☐ Smartphone app
- ☐ Website
- ☐ Social media
- ☐ Telephone
- ☐ Text messaging services
- ☐ Printed maps and schedules

9. If available, would you use a door-to-door, app-based service for same day transportation at an additional cost?

- ☐ Yes
- ☐ No
- ☐ I don't know

10. How old are you?

- ☐ 17 years or under
- ☐ 18 to 24 years
- ☐ 25 to 44 years
- ☐ 45 to 59 years
- ☐ 60 to 79 years
- ☐ 80 years or older

11. Do you have access to a personal vehicle?

- ☐ Yes
- ☐ No
- ☐ Only sometimes

12. My Gender is

- ☐ Female
- ☐ Male
- ☐ Other_____

13. What is your race?

- ☐ American Indian/Alaska Native
- ☐ Asian
- ☐ Black/ African American
- ☐ Native Hawaiian/Other Pacific Islander
- ☐ White/Caucasian
- ☐ Other _____

14. What is your ethnicity?

- ☐ Hispanic/Latino
- ☐ Not Hispanic/Latino

15. My total household income is

- ☐ Less than $25,000
- ☐ $25,000-$49,999
- ☐ $50,000-$74,999
- ☐ $75,000 or greater

Manatee County FLORIDA

YOUR OPINION MATTERS!

Take Manatee County Area Transit's survey for the 10-Year Transit Development Plan.

SCAN QR CODE TO TAKE SURVEY

MCAT 2023 TDP Stakeholder Interview Guide

A) Where Are We Today?

If you have specific thoughts regarding the services MCAT provides, please elaborate.

1) How much awareness of and support for transit services is there in the community? Have the levels of awareness and support changed in recent years?
2) What is your perception of MCAT's role in the community? (Such as: transportation for specific population groups – workers, elderly, low-income, individuals with disabilities, tourists; attracting choice riders; preventing congestion; reducing emissions, creating economic opportunities)?
3) Overall, is MCAT responsive to the needs of the community? If not, what do you see as the primary reasons?
4) Do you believe that information regarding transit services is readily available in the community? If not, how can this be improved?
5) Do you believe that MCAT has a clear and recognizable brand?

B) Where Are We going?

6) What is your vision for public transit in the community?
7) What goals would you like to see MCAT accomplish over the next 5-10 years?
8) What is happening throughout the county in terms of growth and development (e.g., affordable housing issues, congestion, etc.)? Where? How can transit respond to these trends?
9) Do you feel there are adequate regional transportation connections between Manatee County and surrounding areas? If not, how would you prioritize these connections? (Examples include connecting specific locations, expanded services, etc.)

C) How Do We Get There?

10) What category(ies) of improvements should MCAT focus on over the next 10 years to attract more riders?

- Existing fixed-route service improvements (hours, frequencies, etc.).
- Technology and infrastructure improvements for information, comfort, etc. (Examples include bike racks, on-board Wi-Fi, bus arrival signs, etc.)
- Alternative services that complement the existing fixed-route network. This could include implementing mobility on demand-type services in smaller subareas of the county or establishing partnerships with companies like Uber and Lyft to provide first/last mile connections to fixed routes. (Mobility-on-demand is on-demand door-to-door service that is more flexible than typical transit services)
- Other (please describe)?

11) What areas of the county do you believe are not currently served or being underserved by transit services that should receive a higher priority?

12) Are there policies, service practices, service changes, or barriers that should be changed to help MCAT reach the goals mentioned earlier?

D) Final Thoughts

13) What are the major strengths and accomplishments of existing transit services?
14) If you could change one thing about the existing transit system in Manatee County, what would it be?
15) Do you have any additional comments or thoughts to share?

MANATEE COUNTY AREA TRANSIT

Bus Operator Survey

Please take a few moments to answer the following questions. This survey is part of an effort to improve MCAT 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.

___ need more frequent service
___ bus doesn't go where I want
___ bus is late
___ bus leaves stop too early
___ bus is not clean
___ bus is not comfortable
___ need more later service. Until what time?____
___ safety/security at bus stop
___ safety/security onboard bus
___ need better connections to other counties. Where?___
___ bus schedule too hard to understand
___ other (please specify)_____

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

3. What do riders like about MCAT? 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 MCAT 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, etc.

Route	Service Improvement/Comment

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

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

THANKS FOR YOUR HELP!

We want to hear <u>your</u> two cents worth!

Your MCAT Planning team is gathering feedback from operators about MCAT service, routes and operations! Please stop by the large conference room on FRIDAY, February 24th between 10am and 4pm and give us your opinions.

Route 16 doesn't connect properly!
AVAIL never works on my bus!
I enjoy working at MCAT because . . . . .
Passengers need to know about . . . . .

Appendix E. Survey Results

2024-2033 Transit Development Plan (TDP) Major Update
On-Board Survey Results Summary

October 2022

An on-board survey was conducted in October 2022 for Manatee County Area Transit's (MCAT) TDP Major Update. The effort yielded a total of 1,493 surveys, which is significantly more than the prior TDP (849 surveys) and the current target of 1,000.

The following highlights provide a high-level summary of the key findings from the on-board survey conducted over the last month.

How Often Do You Ride the Bus?

When asked how often respondents utilize MCAT's services, the most common response was four or more days per week (63%), followed by two or three days per week (22%), other responses to this question included bi-weekly, monthly, and "very rarely."

How Long Have You Been Using MCAT Bus Services?

A significant number of respondents (36%) indicated that they have been using MCAT's services for more than 2 years, followed by 17% of respondents indicating that they have been using the services for 1-2 years. In addition, 13% of respondents indicated that this trip was their first time utilizing MCAT's services.

How Do You Get Route Schedule Information?

The most used resource indicated was the MCAT MyStop mobile application (25%) followed by printed service schedules (21%) and information at transit stations (18%). Respondents who selected "other" indicated that they receive information about scheduling from operators, personal knowledge, word of mouth, and resort operators.

How Long Does It Usually Take to Get to and from the Bus Stop?

Nearly half of respondents (49%) said it takes them less than 5-minutes to travel to the bus stop, while 37% indicated that it typically takes between 6- and 15-minutes for them to reach the bus stop.

What is Your Trip Purpose?

Most respondents used transit to get to work (34%), followed by recreation (22%), shopping (17%), and for medical purposes (12%). Of the respondents who selected "other," destinations include the library, courthouse, day shelters, and the airport.

If Not by Bus, How Would You Make This Trip?

Most of the respondents indicated that they would utilize a taxi or rideshare service (22%) and almost 21% indicated they would not be able to complete their trip if the bus service was unavailable.

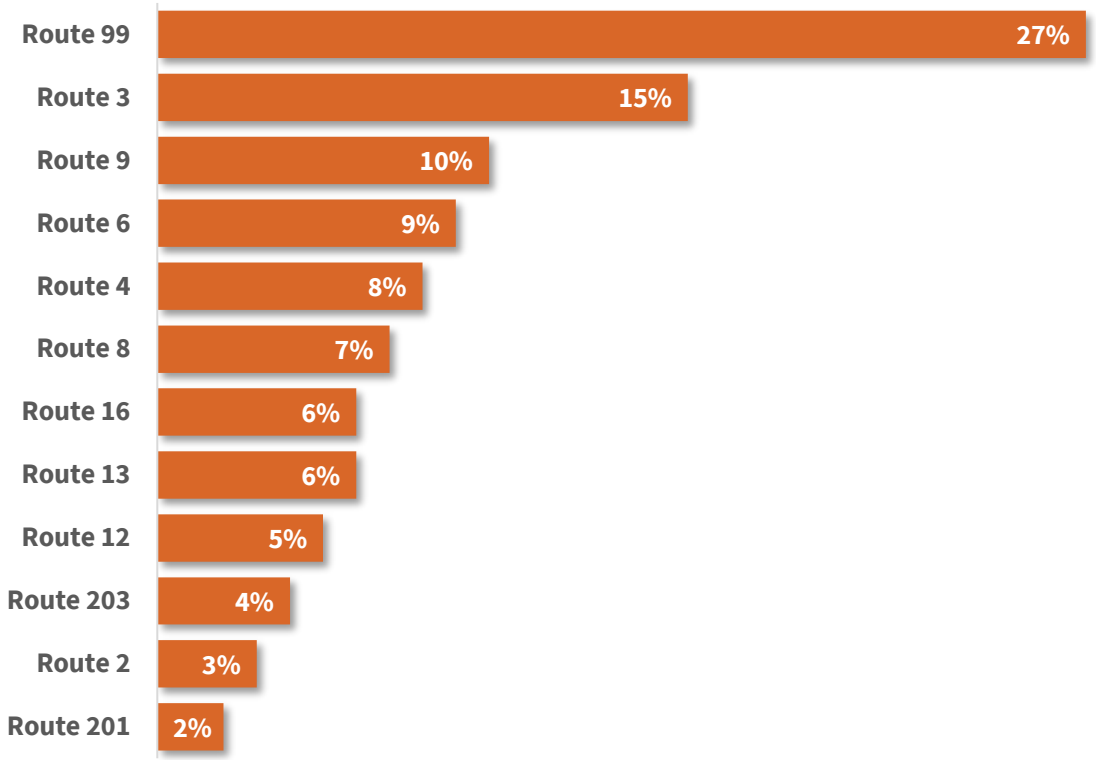
Would You Use the Bus More if it Were Free?

Most (90%) respondents indicated they would use MCAT's services more if they were free.

What Three Service Improvements Would Make MCAT Better for You to Use?

Most of the respondents (26%) indicated that 30-minute frequency on existing routes was among the top service improvements that could be made by MCAT. Additionally, 24% of the respondents suggested expanding service on Sunday, and nearly 20% suggested later evening service on existing routes.

The following highlights the responses for Sunday Service:



Respondents who selected new routes or expanded services suggested extending the AMI Trolley service to Bean Point, as well as extended service to Long Boat Key via the AMI Trolley. Other respondents suggested expanding service east of I-75 into Lakewood Ranch.

How Satisfied Are You with MCAT's Service?

Using a one-to-five rating scale (one representing "very dissatisfied" and five representing "very satisfied"), a weighted average of the 1,412 responses indicated a customer satisfaction score of 4.41 out of 5.

Open Ended Comments

Following the standard survey questions, respondents were encouraged to submit general comments regarding MCAT services. Generally, these comments reflected an overall satisfaction for MCAT services while providing relevant suggestions for service improvements based on the needs of riders. Common topics throughout these comments relate to bus frequency, bus stop amenities, service praise, Sunday availability, and specific route additions and expansions.

Open Ended Customer Comments
A more efficient route to **Lakewood Ranch** would cut travel time drastically for me and my daily work commute.
If buses had an increase in frequency I would ride more often.
Good service, glad to not need my car for this trip.
Buses provide a safe service, no accidents in my 17 years of riding. Good drivers, and good service.
Route 6 to go to Blake Hospital later than 5:30pm.
The usual M-F morning Routes 9 and 99S drivers are very nice and allow for a good environment on the bus ride every morning!
15-minute frequency on key routes, and late-night routes to job areas.
Love this service, quaint and good for the environment.
Great service but bike racks are needed.
Buses need to run all day for workers.
More connections to north county, service to **Lakewood Ranch.**
End the 30-minute wait times at 4:00-4:25.
Sunday service and more frequent Route 3 service.
Improved evening service is needed, along with more Sunday service.
Route 3 to stop on US 41.

On-Board Survey Conclusion

Results collected from the on-board survey prove to be useful in providing insight into the characteristics and perspective of transit riders and to further understand how transit riders utilize MCAT's services. Conclusions formed from analyzing the on-board survey are summarized as follows:

- MCAT's fixed route services earned a high ranking in terms of customer satisfaction, receiving a weighted average of 4.4 out of 5.
- The implementation of MCAT's mobile application, MyStop, has provided a significant benefit to transit riders and has become widely used since being launched.
- The number of long-time and first-time transit users have both inversely progressed, prompting continued observation of changing ridership characteristics.
- The majority of riders (90%) indicated that they would further utilize MCAT services if they were free, suggested fare cost as a limitation to ridership. Additionally, 86% of respondents indicated a household income below $50,000, showing that more than three-quarters of transit riders being below the median household income for Manatee County.
- Passengers agreed that improving the headways to 30-minutes, expanding Sunday service on routes, and extending weekday evening service were the most critical improvements.
- Significant attention was placed on Route 99 and Route 3 for implementing Sunday services.

2024-2033 Transit Development Plan (TDP) Major Update
Online Public Survey Results Summary

March 2023

The MCAT online public survey was conducted in February and March of 2023, and had 16 total questions featuring queries about demographics, ridership information, program suggestions, and more. The survey had 246 respondents. The goal of the survey was to gather public feedback about how MCAT services are currently used, how they can be improved, and what services improvements are desired over the next 10 years.

Demographics and Other Respondent Information

Questions 10, 12, and 13 of the survey regarded the demographics of the respondents. The results reveal that 54% were female and 44% male, as shown below in Figure E-1. Figure E-2 illustrates the respondents' age groups, with exactly half of the survey-takers being in the 60-to-79-year range; only about 3% of the respondents were over 80 or under 18 years old.

Figure E-1: Gender

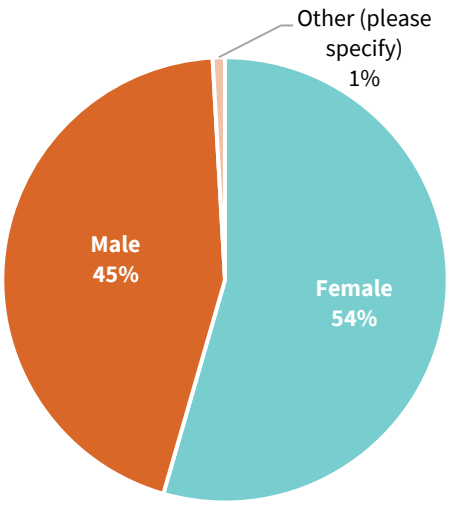


Figure E-2: Age

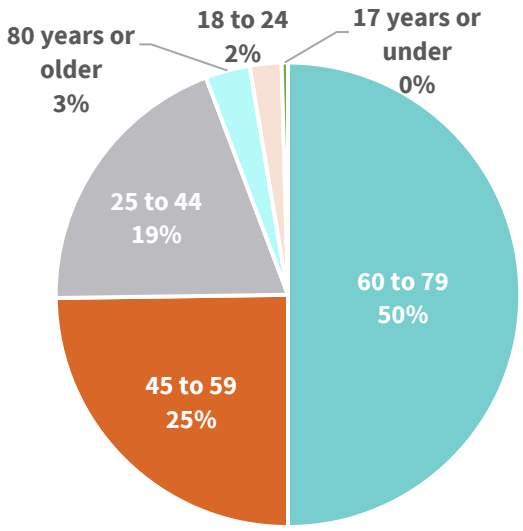
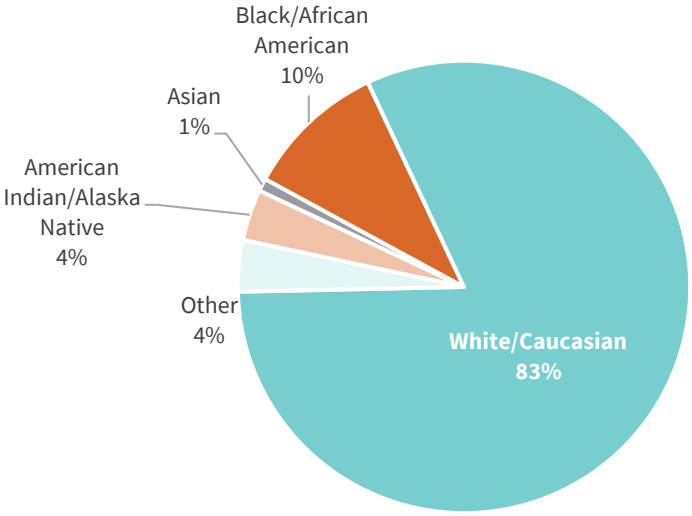


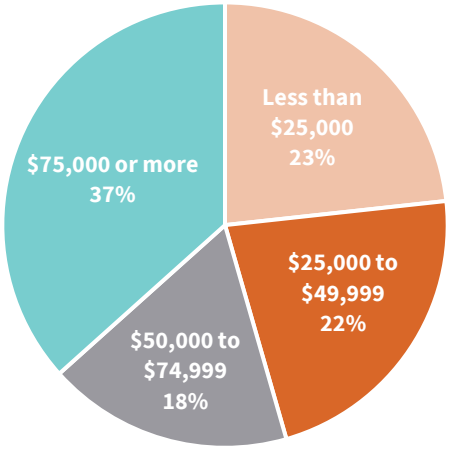
Figure E-3 displays the distributions of responses to the question regarding race. A large percentage of the respondents indicated a race of White/Caucasian (83%), and the second most common was Black/African American (10%).

Figure E-3: Race



Additionally, Question 15 on the survey asked for total household income, which had a more even spread of responses, as shown in Figure E-4. The answer choice with the highest amount of responses was $75,000 or more with a 37% share.

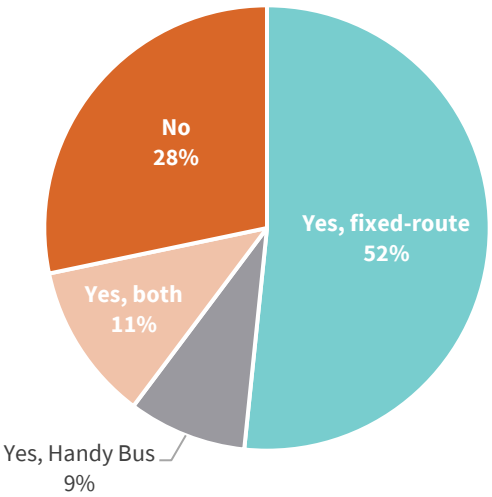
Figure E-4: Household Income



Customer Trip Characteristics

This section highlights the usage and patterns of how current customers interact with MCAT services, such as how many people have used the fixed-route or Handy Bus Services, where they go with the services or wish to go in the future, and for those that responded that they do not currently use it, what the main reason for this was. As shown in Figure E-5, just over half (52%) of respondents have used the MCAT fixed-route service before, and 28% have not used MCAT at all.

Figure E-5: Have you or a household family member used MCAT fixed route or Handy Bus Services?



For the subset that have not used these services before, the most popular reason for this is that driving is more convenient or faster (Figure E-6). Figure E-7 illustrates the ratio of survey-takers that have access to a personal vehicle. The results show that 70% responded that they do have

access to a personal vehicle, with 26% of the respondents not having this same access to convenient, personal mobility.

Figure E-6: If you answered no, what is the main reason for not using MCAT Transit Services?

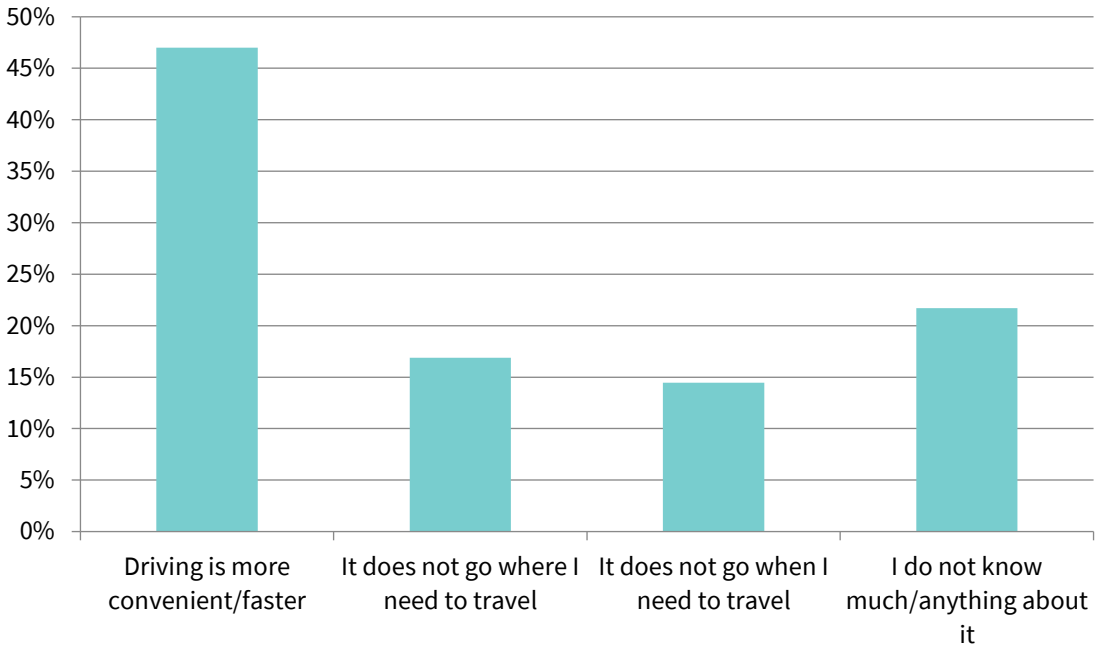
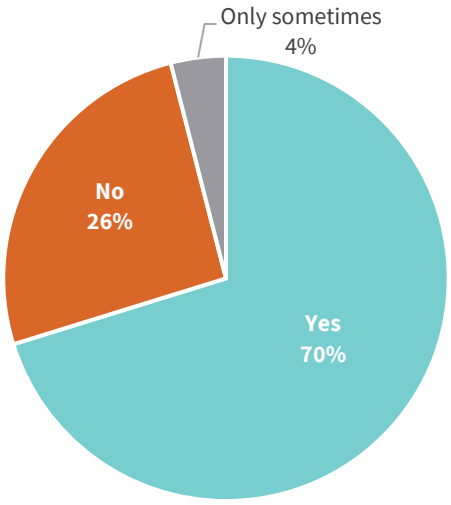
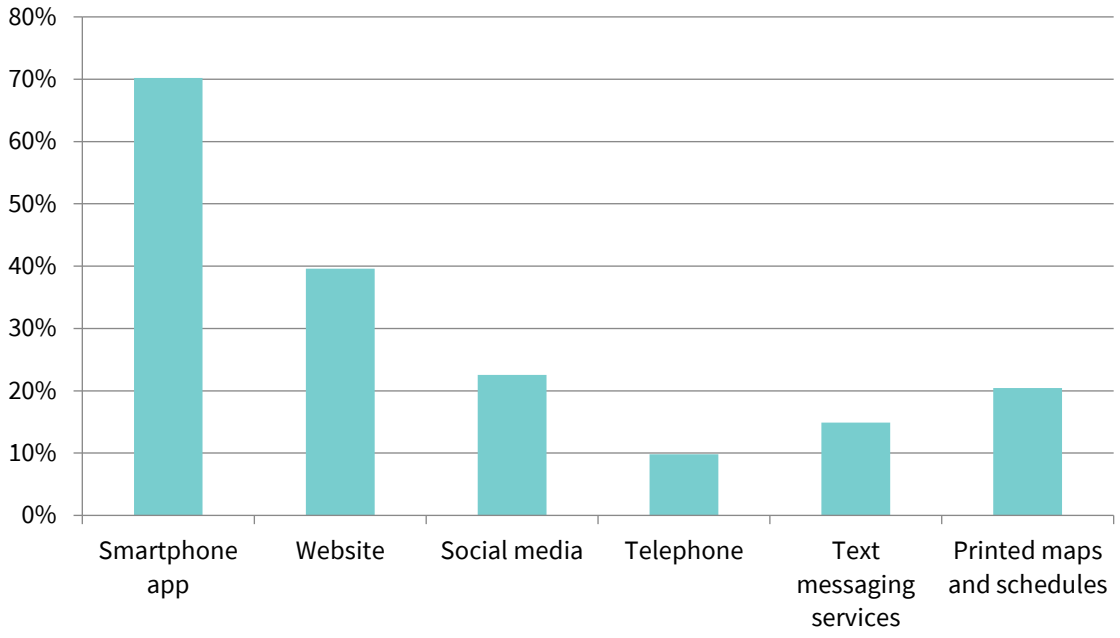


Figure E-7: Do You Have Access to a Personal Vehicle?



It is also worthy to note the responses to the preferred method for access to public transit information. As illustrated in Figure E-8, a smartphone app or website was the preferred method for the survey respondents, with approximately 70% selecting Smartphone app, and 40% selecting website.

Figure E-8: How would you like to access public transit information?



Program Suggestions

The online survey also asked questions about improvements or additions to the transit services that could be made to make it more desirable. Figure E-9 reveals that 70% of respondents believe that there is a need for additional or improved transit services in Manatee County.

Figure E-9: Do you think there is a need for additional/improved transit services in Manatee County?

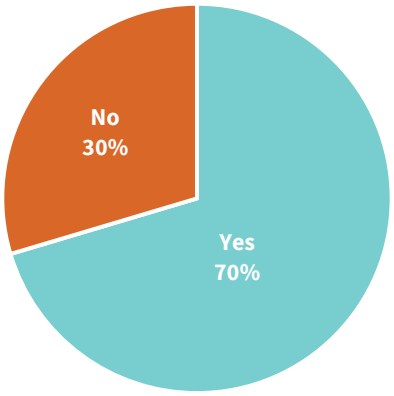
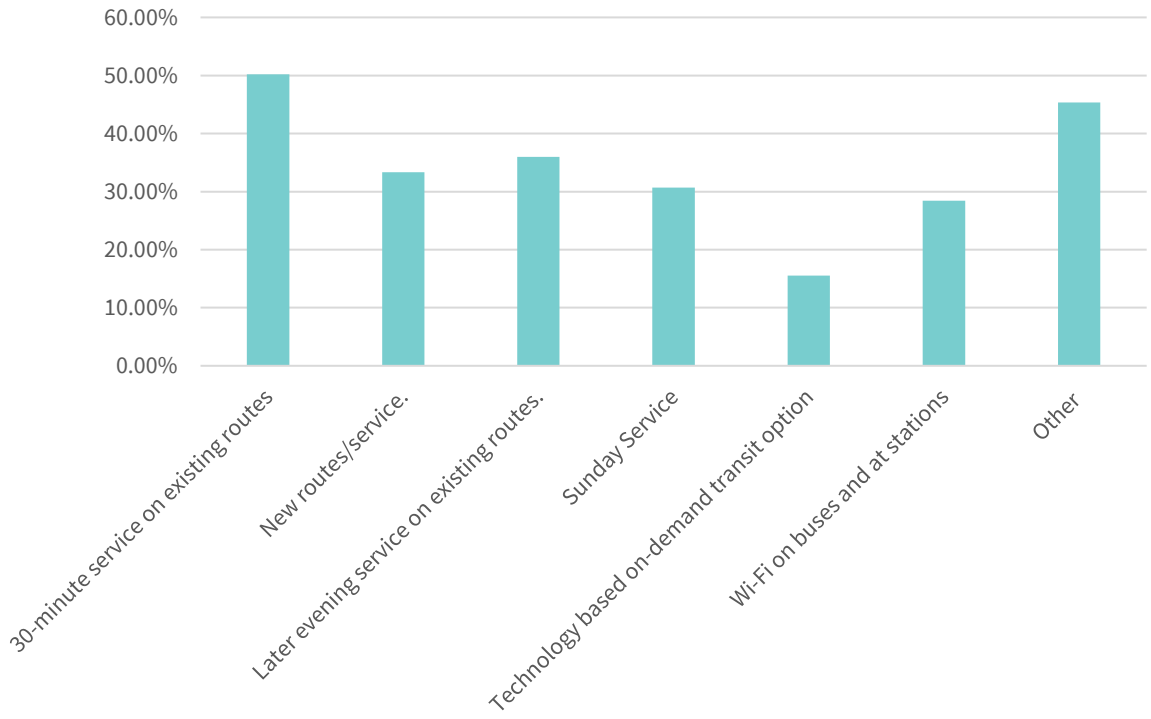


Figure E-10 highlights some options for improvements that could make transit services more appealing. The answer choices received about 30-50% responses each; the top answer with 50% was 30-minute service on existing routes, followed by 45% saying other, 36% desiring later

evening service, and then 33% of people responding with new routes/service. Of those that chose Other, common responses include providing later services, improved safety, connections to Parrish or other outlying areas, quicker/more direct routes, additions to the bus such as outlets or seatbelts, and to provide more information about the services, service changes, and riding procedures.

Figure E-10: What would make transit services more appealing for you to use it/ use it more?



Figures E-11 and E-12 illustrate the results of questions regarding additional services such as door-to-door and ferry or water taxi service. As Figure E-11 shows, approximately half (51%) of the respondents stated that they would use a door-to-door service. About a quarter (28%) said they would not use a door-to-door service and 21% responded that they do not know.

Figure E-11: Would you use a door-to-door service at an additional cost?

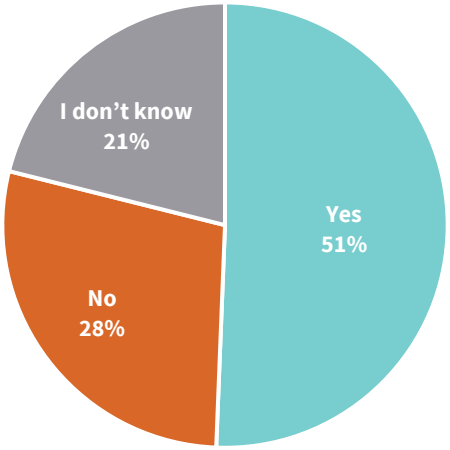
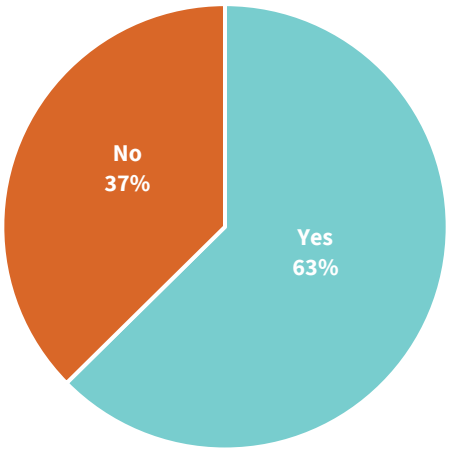


Figure E-12, below, displays the percentage of people that would use a ferry/water taxi, with more than half saying that they would use it and only 37% responding that they would not. When asked for additional comments at the end of the survey, it should be noted that 5 of the 66 comments expressed excitement about a ferry/water taxi service.

Figure E-12: Would you use a ferry/water taxi service?



Comments

Out of the 246 surveys completed, there were 66 responses to Question 16, which asked for the participants to list any general comments they had. Below is a summary of some of the recurring responses regarding desired transit improvements.

- Improve consistency on times for arrival of buses, buses can sometimes run late or do not show up.
- Expand hours to holidays, Sundays, late evenings, and earlier mornings.
- Improve the app with more accurate real-time tracking of the buses and trip planning capabilities.
- More covered bus stops.
- Address operator shortages.
- Request a dedicated bus lane on busy roads, highways, or interstates.

Appendix F. Performance Monitoring Report

Performance Measures and Indicators

Once the proposed transit services are implemented, the following performance indicators and measures should be monitored by MCAT on a quarterly basis for its fixed-route services as part of the recommended performance-monitoring program:

- Passenger Trips – Annual number of passenger boardings on the transit vehicles.
- Revenue Hours – Number of annual hours of vehicle operation while in active service (available to pick up revenue passengers).
- Revenue Miles – Number of annual miles of vehicle operation while in active service (available to pick up revenue passengers).
- 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, performance data to that point should be reviewed and interpreted cautiously. Although adjustments/modifications are encouraged, outright discontinuations based on performance monitoring data alone are discouraged.

Evaluation, Methodology, and Process

Performance monitoring is based on two measures—trips per mile and trips per hour, which are weighted equally to derive an overall route score. An individual 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 the two 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 caution should be exercised when using the final scores and rankings, because these numbers 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 comparative performance-related issues. These routes can then be singled out for closer observation in future quarters or 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 (≥ 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 require more detailed analysis (e.g., ride checks, 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 – Requires Attention (≤ 29%) – Routes in this category exhibit poor performance and low efficiency relative to other routes. 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 F-1 illustrates the three evaluation levels and notes the recommended thresholds for each level.

Figure F-1: MCAT Route Performance Monitoring Evaluation