What is Transit Oriented Development (TOD)?

**TOD is ...**

- Development within ¼ to ½ mile of Station or along Transit Corridor (10-minute walk)
- Mixed-Use with Higher Density & Intensity than Surrounding Area
- Pedestrian & Bike-Friendly
- Controlled Parking
- Streetscapes & Site Design focused on Pedestrian Flow
TOD vs. TAD

- **Transit Oriented Development**
- **Transit Adjacent Development**

- Auto-oriented uses
- Large surface parking lots
-Disconnected from adjacent sites; internally focused
- Pedestrian unfriendly

- Suburban office campuses
- Big-box format retail
- Storage facilities & industrial

Transit Oriented Development Policy

Adopted by SFRTA Board: Resolution 17-01 (April 2017)
1. **Miami-Link Segments**
   1A: Service into Downtown Miami
      *Begins 1st Quarter 2020*
   1B: Downtown Miami to Aventura
      *Planning Underway*

2. **Jupiter Extension Segment**
   *West Palm Beach to Jupiter
      Planning Underway*
   *Needs Local Financial Commitment*

3. **Central Segment(s)**
   *West Palm Beach to Aventura
      Planning TBD
      Needs Local Financial Commitment*

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### SunRail Statistics

- **16 Stations in 49 Miles (17th planned in Deland)**
- **12 stations in May 2014; +4 stations July 2018**
- **20 trains daily (Mon-Fri, 5 AM – 10 PM)**
  *(no weekend service except for special events)*
- **2019 Daily Ridership = 6,000+ (+25% since July)**
- **FDOT Transfer to Local Governments in 2021**

### Purpose of Trip

<table>
<thead>
<tr>
<th>Purpose of Trip</th>
<th>Percentage</th>
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<tr>
<td>Commuter Work Trips</td>
<td>3.9%</td>
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<tr>
<td>Leisure &amp; Pleasure Trips</td>
<td>27.2%</td>
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<tr>
<td>Other</td>
<td>68.9%</td>
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### Adult Fare Structure

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<th>Fare Category</th>
<th>Out-Of-Market (Out-of-Town)</th>
<th>Round-Trip</th>
<th>Weekly Pass</th>
<th>Monthly Pass</th>
<th>Annual Pass</th>
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<tr>
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SunRail Stations ~ Typical Design Features

SunRail Stations ~ Local Variations
SunRail Ridership (Annual Totals)

SunRail ANNUAL RIDERSHIP BY STATION
FISCAL YEAR TO DATE JULY 2018 – FEBRUARY 2019

Note: These are preliminary numbers and subject to change. Special service days PM1 – 16

SunRail Ridership

AM PEAK
August 20 - September 30

Boardings, Alightings
SunRail Ridership

PM PEAK
August 20 - September 30

SunRail’s TOD Approach: Start Early!

SunRail Opening Day: May 1, 2014
SunRail’s TOD Approach:
Define What You Want
Update Plans & Codes
Stay Focused on TOD

SunRail’s TOD Approach: Private Sector Leadership is Key ~ Engage & Collaborate

For several decades, a corps of highly-skilled, strategically-focused and passionately dedicated individuals from the public and private sector have been pursuing a similar goal with equal determination.

SunRail TOD Forum
May 14, 2012

Connecting Florida: How ULI’s Florida District Councils Changed the Conversation About Transit

Orlando Sentinel
November 29, 2011
Orlando-area cities push for development around SunRail stations

ULI Central Florida attracted standing-room only crowds to Connecting Florida events that discussed opportunities to integrate rail and land use, playing off the coming SunRail commuter rail line.
(1) STATIONS & TOD = ECONOMIC DEVELOPMENT

• Local governments view stations as investments to grow business
• Property value increases, higher densities, more jobs & revenue

Orlando Sentinel See how much property values have soared around SunRail stations

Property values around the first 12 train stations increased by $2.4 billion — 63 percent — from 2011-2017, and FDOT estimates that $1.19 billion of that is directly attributable to SunRail, according to a report in GrowthSpotter.

Each station has drawn new development, and most experienced a sharp increase in property values that outpaced their surrounding areas by nearly 23 percent.

Lessons Learned

(2) GET TOD ZONING/LAND USE IN PLACE EARLY

• SunRail led station area TOD planning 7 years before stations
• Raised expectations & acceptance for higher densities & intensities
• City of Orlando started 20 years before the stations arrived
• Code changes can take years (e.g., Orange County still working on it)
(3) STATION CONTEXT & CONNECTIVITY MATTER
- Most walkable stations = historic downtowns with existing street grid
- Property values in downtowns → highest rate of increase

Lessons Learned

(4) FDOT-OWNED LAND = STATION AREA “LAND BANK”
- FDOT parking & property transfers to cities for development in 2021
- Local governments already anticipating public/private development

Lessons Learned
(5) NEED LOCAL CHAMPION TO KEEP STATION A PRIORITY

- Local leaders (mayors, property owners) were key
- Need leadership within governmental structure for TOD focus
- Infrastructure and policy prioritization

Buddy Dyer wants to keep the mayor’s job - Orlando Rising
https://orlandorising.com/buddy-dyer-wants-keep-mayor-job/

Oct 31, 2017 - Buddy Dyer announced Tuesday he will run for a fifth term as ... build the Creative Village and take SunRail to the Orlando International Airport.

(6) STATION CONNECTIONS & TRANSIT ARE WELL-DEFINED

- SunRail is center of transit system connectivity
- Stations are developed as intermodal hubs
**Lessons Learned**

### (6) STATION CONNECTIONS & TRANSIT ARE WELL-DEFINED

- Transit connections are well-defined, intuitive & easy to access

### (6) STATION CONNECTIONS & TRANSIT ARE WELL-DEFINED

- Ridesharing plays a meaningful role for access & connectivity

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**ORLANDO BUSINESS JOURNAL**

See how many rides Uber generated through its Central Florida pilot program

The five cities paid a combined $340,000 in the 10-month period from August 2017 to July 2018. Phase I, went from July 2018 to July 2019, cost a total of $63,700.21 for the cities.

The San Francisco-based rideshare company entered into individual public-private partnerships with Altamonte Springs, Lake Mary, Longwood, Maitland and Sanford, offering discounts to riders. Each city paid 20 percent of fares that started and ended within the partner city limits, and 25 percent off fares that started or ended at the partner city limits.

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**10-MONTH PILOT PROGRAM: 186,148 RIDES**
(6) STATION CONNECTIONS & TRANSIT ARE WELL-DEFINED

• SunRail/Airport connection could shift from bus to rail

Lessons Learned

Sand Lake Road
SunRail Station

Orlando International Airport
(Terminal A/B)

Meadow Woods
SunRail Station

Brightline Station
(Terminal C)

(6) STATION CONNECTIONS & TRANSIT ARE WELL-DEFINED

• SunRail/Airport connection could be Brightline/Virgin Trains

Lessons Learned

Location for
Brightline/Virgin Trains
Track Extension
(from SR 528 to OIA)
(7) SUNRAIL TOD IS A CORRIDOR APPROACH

- Station-area development responds to local market demand
- Mix of residential, employment, downtown station types

Lessons Learned

Downtown Orlando  
Orlando Health Campus  
Downtown Winter Park  
Sanford Waterfront

(8) NAMING RIGHTS ARE OF VALUE

- Tupperware, Orlando Health & AdventHealth stations
- Private development programs focused on station connectivity
- Vested interest in system establishment → Private Sector Leadership

Lessons Learned

AdventHealth Station (Orlando)  
Tupperware Station (Osceola County)  
Orlando Health Station (Orlando)  
AdventHealth Station (Orlando)
(9) MARKET IS DEMANDING STATION-AREA RESIDENTIAL

- Suburban densities are 30-50 du/ac (four stories)
- Urban densities > 100 du/acre
- Residential demand driving up rents & level of amenities

Lake Mary Station
“Station House” Apts
Monthly Rents
1/1 = $1200; 3/2 = $2300

Lessons Learned

(10) LOCAL GOVERNMENTS HAVE OWNERSHIP

- FDOT transfer to local governments in 2021 (7 years)
- Local station upgrades & branding (e.g., Longwood, Winter Park)
- High maintenance standards (stations & parking/landscaping)
**SunRail Field Tour: Overview & Lessons Learned (UPDATED)**

### (11) SUNRAIL FEELS LIKE A CUSTOMER-FOCUSED SYSTEM
- Stations & parking areas = well-maintained, clean and well-lit
- System is easy to navigate, touch-screen ticketing, backlit maps
- Station ambassadors are customer-service specialists (knowledge of station areas & entire corridor)

### Lessons Learned
- Meadow Woods SunRail Station
- Altamonte Springs SunRail Station
- Lynx Central SunRail Station

### (12) BIG BENEFITS FOR TRI-RAIL/SUNRAIL COLLABORATION
- Similar trains & stations but newer & updated
- Opportunities for economies of scale (purchasing, contracting, etc.)
- Advantages for coordinated legislative & policy approach

### Lessons Learned
- Photos of trains and stations
## For More Information

<table>
<thead>
<tr>
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<th>Organization</th>
<th>Email</th>
<th>Phone</th>
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