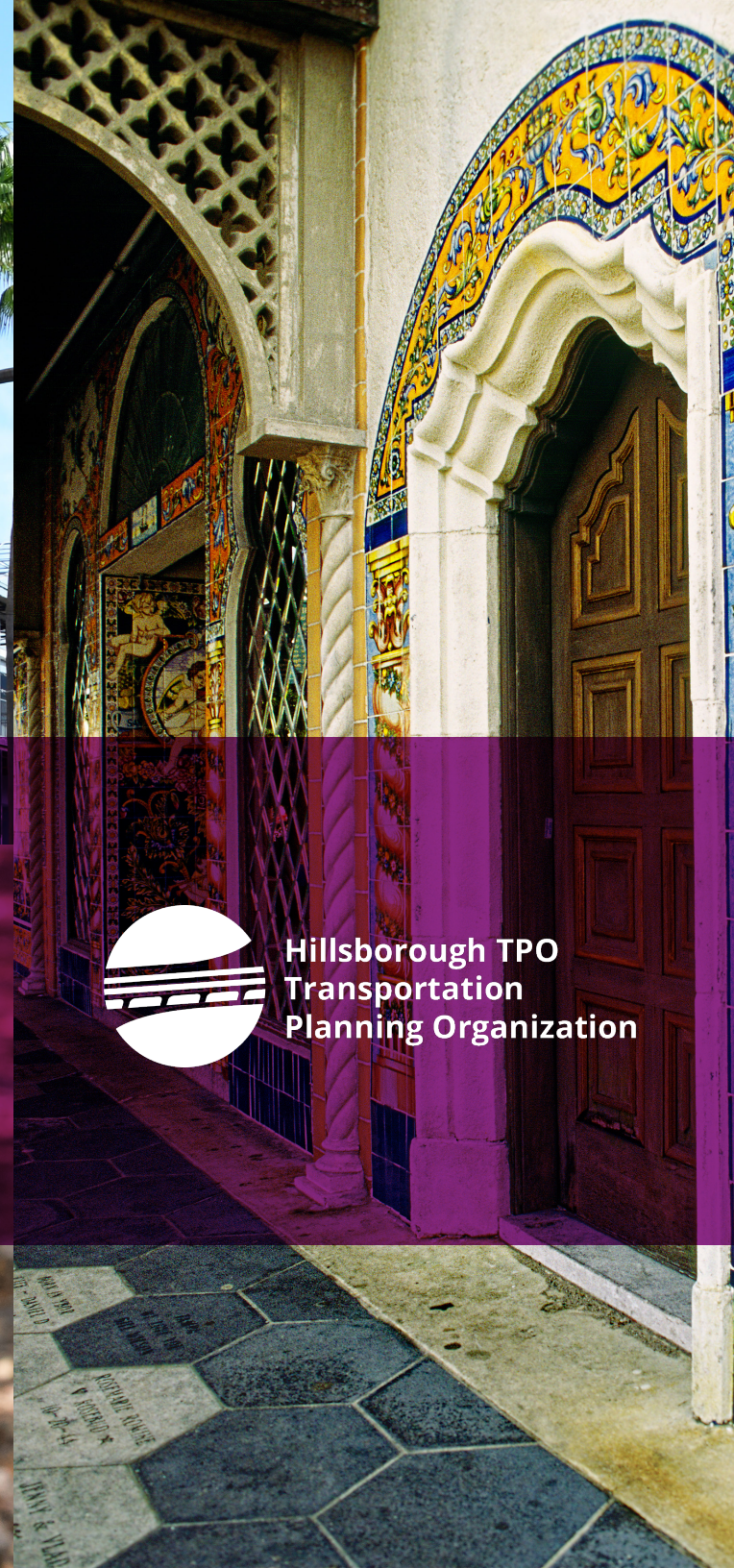




Brightline Station Area Study EXECUTIVE SUMMARY

December 2025



Hillsborough TPO
Transportation
Planning Organization

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Study Overview

This study aims to evaluate multimodal needs and connectivity around a potential Brightline passenger rail station in greater Downtown Tampa. The recommendations provide a framework for consideration as future projects are developed to enhance mobility and connectivity and can be used regardless of or if passenger rail advances.

The study included stakeholder and agency outreach; identification and evaluation of existing conditions, needs, and opportunities; and an assessment of the demand for access to key destinations and other Brightline stations. Planning now for a potential Brightline station in Tampa, including understanding potential ridership, strengthening regional connections, and identifying short- and long-term mobility solutions to support sustainable development and enhance economic vitality, were key objectives of the study. Many of the suggested solutions can and should be advanced to improve mobility, regardless if a potential Brightline station is developed.

STUDY GOALS



Identify potential Brightline users



Assess demand for multimodal connections to key destinations

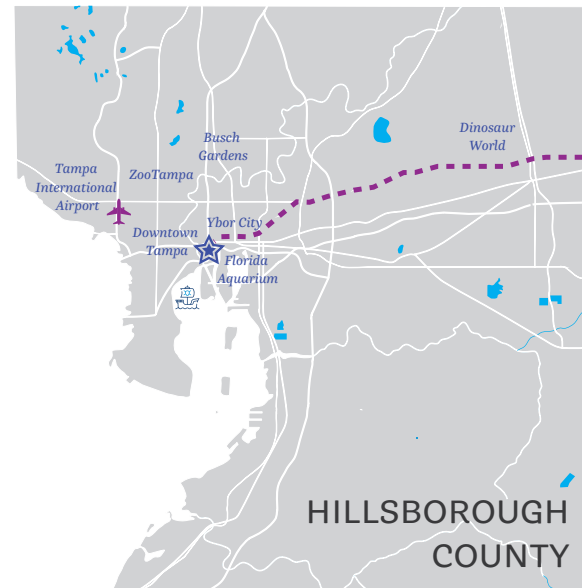
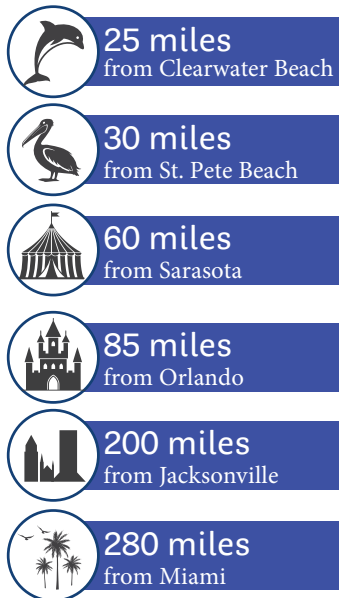


Evaluate mobility and infrastructure improvements



Develop an early action plan for planning and stakeholder coordination

APPROXIMATE DISTANCE FROM TAMPA TO OTHER MAJOR FLORIDA DESTINATIONS



EXISTING, PLANNED & POTENTIAL BRIGHTLINE STATIONS



Source: Brightline

Stakeholders & Study Team

The Hillsborough Transportation Planning Organization (TPO) worked with the numerous partner agencies and stakeholders to develop this study:

- » Hillsborough County City-County Planning Commission
- » Florida Department of Transportation (FDOT)
- » City of Tampa
- » Port Tampa Bay
- » Hillsborough Transit Authority (HART)
- » Tampa Hillsborough Expressway Authority (THEA)
- » Tampa Downtown Partnership
- » Tampa Bay Partnership
- » Friends of Tampa Union Station
- » Hillsborough County Public Schools
- » Brightline, LLC*
- » Tampa International Airport (TPA)*
- » HNTB*
- » Consultant Team: HDR, Inc. & Vrana Consulting Inc.

*Coordinating Partners

Connecting People & Places

Greater Downtown Tampa, including Ybor City and the Channel District, form an important urban activity center for the Tampa Bay Region. Continuing to plan for and support forward-looking development, balancing growth and the area's historic character, and improving mobility conditions are critical needs for residents, employees, and visitors trying to move around the downtown core and get to regional destinations.

While it is unknown as to when a Brightline station and new regional passenger rail service will become a reality in Tampa, strengthening transportation linkages within Tampa's urban core remains essential to improving access for all types of people. Enhancing linkages between Ybor City, the Channel District, and the greater Downtown Tampa area will improve regional accessibility and promote sustainable urban development.

Downtown Tampa serves as a major economic hub, home to leading employers, government offices, cultural institutions, educational facilities, entertainment venues, tourism destinations, a thriving port, and a growing residential community. Investing in safer, more efficient mobility options and preserving the area's rich cultural heritage will not only support the ongoing and planned private investments and redevelopment, but also position the city for successful station-area development should Brightline service be introduced in the future.

STUDY AREA FOR POTENTIAL TAMPA BRIGHTLINE STATION (1/4 MILE BUFFER)



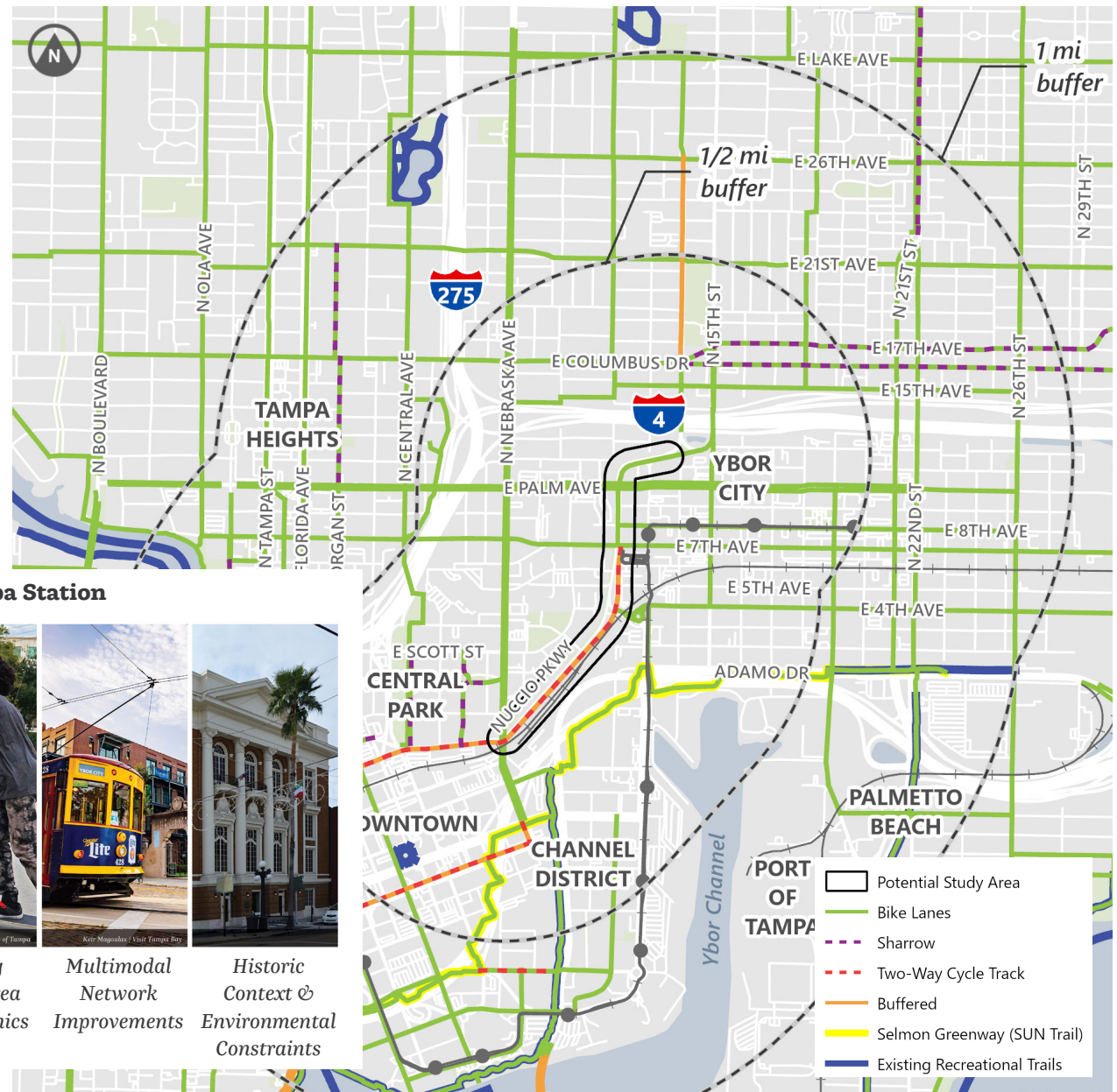
A thorough review of existing conditions and analysis of needs within the station area was used to understand opportunities to strengthen regional connections, support sustainable urban growth, and enhance mobility. Findings from the full analysis are summarized below and provided in full in separate report sections and appendices. Key areas of analysis included:

- » Context assessment of existing multimodal facilities, planned mobility projects, and opportunities for future improvements; shifting population and employment trends; and changes in land use and development patterns.
- » Lessons learned from other existing Brightline stations.
- » Station user profiles based on ridership assessment and public survey findings related to desired destinations and modes of travel.

A collage of six images showing various urban and lifestyle scenes: a family at an aquarium, a modern apartment building with a sign for 'LA UNION', a street scene with a rooster, a skateboarder, a yellow and blue tram, and a classical building facade.

Historic
Context &
Environmental
Constraints

BICYCLE FACILITIES & TRAILS WITHIN THE POTENTIAL BRIGHTLINE STATION AREA



Station Area Context Assessment

The study area's conditions, demographics, and planned improvements or developments reveal several key findings that are important to note for potential station development and coordinating future mobility improvements.

- » This area has robust connectivity to I-4, I-275, the Selmon Expressway, Union Station, and the TECO Streetcar.
- » It is centrally located between a mix of dense, urban neighborhoods and major destinations, including Ybor City, downtown Tampa, the Channel District, Water Street, and Tampa Heights.
- » With close proximity to Tampa's Union Station, the Port of Tampa, and several major mixed use developments that are underway, including Gasworx (50 acres) and Ybor Harbor (33 acres), the station area is positioned to grow as a strategic gateway to the region.
- » New developments are anticipated to add thousands of new homes, jobs and residents.
- » The area has a diverse, younger, and transit-supportive population, with lower car ownership and rising education levels, as compared to other areas in Hillsborough County.
- » The nearby TECO Line Streetcar enhances multimodal potential of a Brightline station. However, there is a need for improved connectivity to continue to support the expected growth, tourism, and economic development in the area.

Peer Facilities Review

Successful transit-oriented developments, including Brightline's MiamiCentral, Fort Lauderdale, and West Palm Beach stations, incorporate a variety of strategies for urban integration, multimodal connectivity, and passenger experience. The study team identified the following features for consideration at a potential Tampa station.



ACCESS & DROP-OFF

- » Wide, dedicated drop-off loops by mode
- » Wide, pedestrian-friendly sidewalks
- » Circular traffic flow



PARKING

- » Shared parking in public garages or dedicated parking garages for Brightline riders



COMFORT & ENVIRONMENT

- » Shaded, tree-lined walkways.
- » Lighting for increased safety and visibility



STATION AREA VIBRANCY

- » Coffee shops, restaurants, and shops within a 5-minute walk



WAYFINDING & VISIBILITY

- » Clear wayfinding signage from major roads and within station site



SURROUNDING CONNECTIONS

- » Higher-intensity, transit supportive, and mixed-use land uses

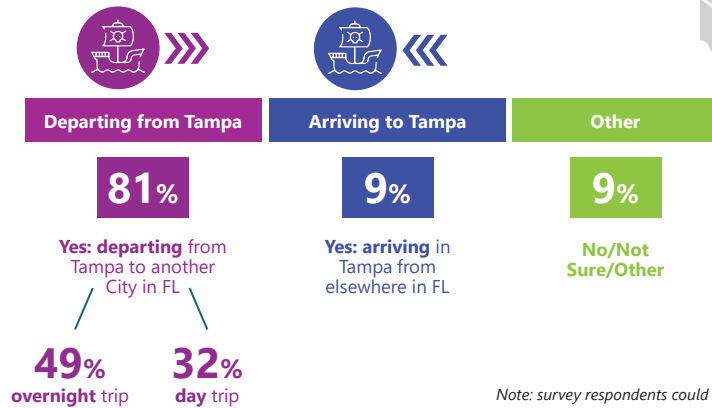


Station Needs Survey

Input received from a public survey conducted in May 2025 (over 11,000 responses) emphasized the importance of convenience, safety, and need for comfort at a potential Tampa station. The station results also revealed travel preferences for destinations, desired travel mode to and from the station, and what factors would impact people's ability or desire to use a potential Brightline service.

Potential Station Users: Origins & Destinations

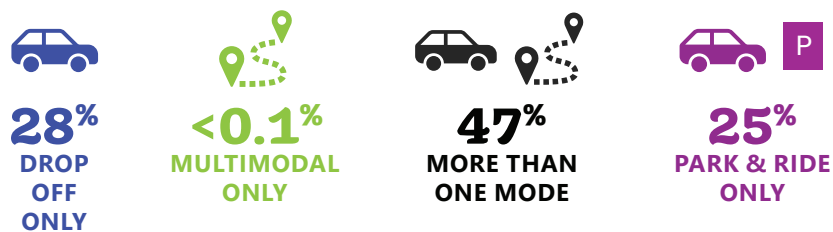
Would you use a Tampa Brightline Station?



“Brightline to Orlando and back would be a great asset to Tampa. Tampa has been wanting and waiting for this for a while now.”

- SURVEY RESPONDENT

DEPARTING FROM TAMPA: MODE CHOICE TO GET TO THE STATION



ARRIVING TO TAMPA: MODE CHOICE TO GET FROM STATION TO THEIR FINAL DESTINATION



Tampa Brightline Station Survey

Together with its partners, the Hillsborough TPO is exploring access and connection possibilities for a potential Brightline station in the greater downtown Tampa area. We invite you to share your thoughts on how people should access and connect to and from a potential station in downtown Tampa.

STUDY GOALS

- Identify potential Brightline users
- Assess demand for multimodal connections to key destinations
- Evaluate mobility and infrastructure improvements
- Develop an early action plan for funding, planning, and stakeholder coordination

YOUR FEEDBACK WILL HELP US:

- Understand destinations and travel modes from the station
- Identify key connections: transit, walking, biking, rideshare, and driving
- Highlight ways to improve station access for residents, commuters, and visitors

TAMPA BRIGHTLINE STATION STUDY AREA

The location of a potential Tampa Brightline station has not been determined. This map is part of an exploratory study intended to gather input on travel preferences, access needs, and connectivity options.

COMPLETE THE SURVEY BY MAY 31, 2025.

ENTER A DRAWING FOR A \$100 GROCERY GIFT CARD.

For more information, please contact:

Sarah Caper, Executive Planner
capers@plancom.org

Wally Gallart, Planner II
gallartw@plancom.org

planhillsborough.org/project/brightline-station-area-study

SCAN THE QR CODE TO TAKE THE SURVEY!

bitly URL here

Station Access Analysis & Passenger Rail User Profiles

Using 2024 origin–destination analysis data and input from the study survey, the study found:



24M+

OVER 24 MILLION ANNUAL TRIPS OCCUR BETWEEN TAMPA, EXISTING, AND PLANNED BRIGHTLINE STATION AREAS



75%

OF THESE TRIPS ARE BETWEEN TAMPA & ORLANDO

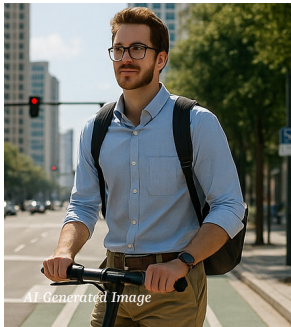


361K - 947K

BASED ON REPLICA DATA, MARKET CAPTURE RATES, AND INPUT FROM THE SURVEY, 361,000 & 947,000 TRIPS COULD SHIFT FROM OTHER MODES TO BRIGHTLINE ANNUALLY

Based on the demographic research and existing trip analysis, the study team created nine profiles (two examples shown below) that illustrate a range of travel behaviors and access needs for future Brightline station users, from business commuters to tourists and other leisure travelers. These profiles are useful to help define key characteristics of potential station users to help plan for specific needs and concerns during the design of the station and surrounding area including parking and drop off, wayfinding, and service frequency. Users want and need safe pedestrian routes, clear wayfinding, secure parking, convenient drop-off areas, and easy connections to other transit modes to key regional destinations, and direct first- and last-mile connections.

EXAMPLE USER PROFILES



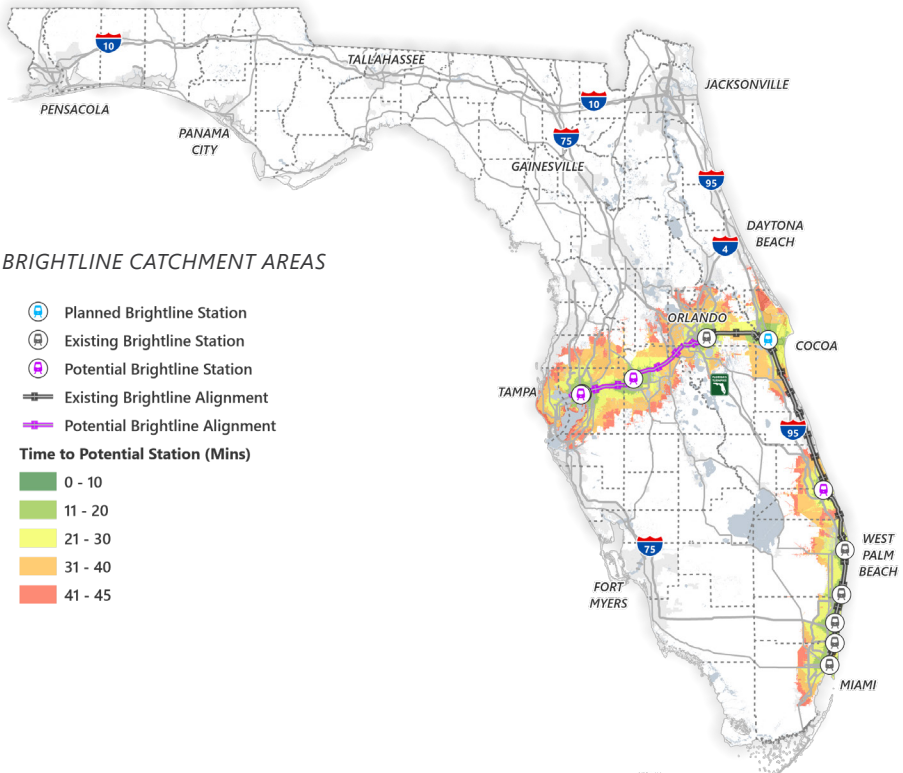
ERIC
The Young Professional Urban Commuter

Estimated Age/Annual Income	25–34 years old, \$75,000–\$100,000
Lives in:	Channel District
Trip Purpose:	Business day trips to Orlando
Destination:	Orlando Airport Brightline station
Access Mode:	Arrives to Tampa station by e-scooter
Infrastructure Needs:	Safe sidewalks, protected bike lanes, scooter parking, and wayfinding signage
First/Last-Mile Challenge:	Scooter parking, safe crossings, weather protection, and non-rush hour travel safety



ANNA
The Cruise Traveler from Lakeland

Estimated Age/Annual Income	65+, \$50,000–\$74,999
Lives in:	Lakeland
Trip Purpose:	Leisure trip with husband connecting to a cruise departing from the Port of Tampa Bay
Destination:	Tampa Brightline station
Access Mode:	Arrives to Tampa station from Lakeland Brightline station, then transfers to Port Tampa Bay
Infrastructure Needs:	Dedicated, clearly marked service to cruise terminal
First/Last-Mile Challenge:	Mobility and luggage handling near station and cruise terminal



Station Area Needs & Connectivity Plan

In addition to suggestions for multimodal facilities within a potential Brightline station building and site, further connections to local roadways and the broader multimodal network will be needed within the station area (defined as 1/4 mile from the potential station site) and the greater Downtown Tampa and Ybor City area (1/4 mile and beyond). While several multimodal projects are already planned or underway, some other ideas or solutions to provide additional mobility improvements or enhancements were identified. A set of Connectivity Plan maps were created to illustrate a multimodal framework to improve future access and mobility.

The Connectivity Plan highlights a range of ideas for the site, station area, and larger area, including:

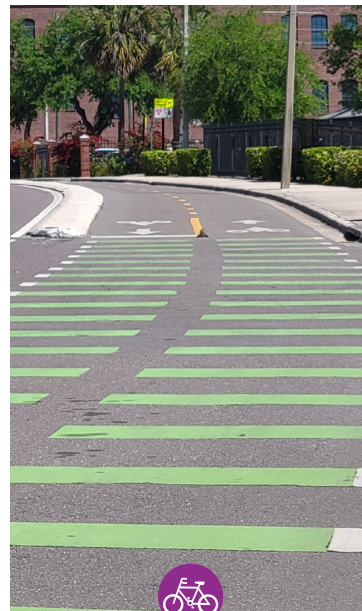
- » **Station Site:** Design the station site to ensure multimodal access, parking, drop-off areas, safe pedestrian and bicycle connections, wayfinding, and lighting, integrating transit, streetcar, and shuttle connections to key destinations.
- » **Roadway and Parking:** Encourage shared parking structures, dedicated curb space, and EV charging.
- » **Transit:** Coordinate with HART, PSTA, and TECO Line Streetcar to connect major destinations such as USF, Tampa International Airport, and Port Tampa Bay. Evaluate opportunities to relocate nearby bus stops to improve access to the station when co-location is not feasible.
- » **Bicycle:** Extend the Green Spine cycle track, add secure bike parking, and improve trail links.
- » **Pedestrian:** Fill sidewalk gaps, improve crossings on Nuccio Parkway, and enhance lighting and shade.
- » **Wayfinding & Technology:** Integrate real-time signage, parking sensors, and clear directional guidance between transit modes.



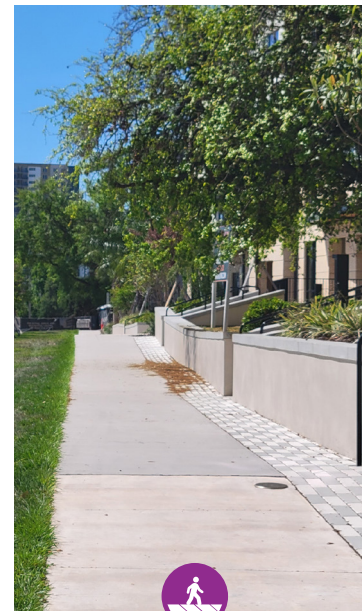
ROADWAY & PARKING



TRANSIT



**BICYCLISTS/TRAILS/
SHARED USE PATHS**



**PEDESTRIAN/TRAILS/
SHARED USE PATHS**



**OTHER: TECHNOLOGY
& WAYFINDING**



Roadway & Parking: Conceptual Connectivity Plan

This conceptual map highlights potential future roadway and parking improvements to enhance connectivity and access around a potential Brightline Tampa Station. Key recommendations include reconnecting the street grid south of I-4 near 14th and 15th Streets, improving auto safety and access near Union Station, implementing speed management along Meridian Avenue, and tracking redevelopment opportunities in and around the Twigg's Street Garage.

For reference plans and images related to programmed and planned projects, see Appendix D.

- Parks
- Water
- Future/Ongoing Development Projects

Existing Facilities

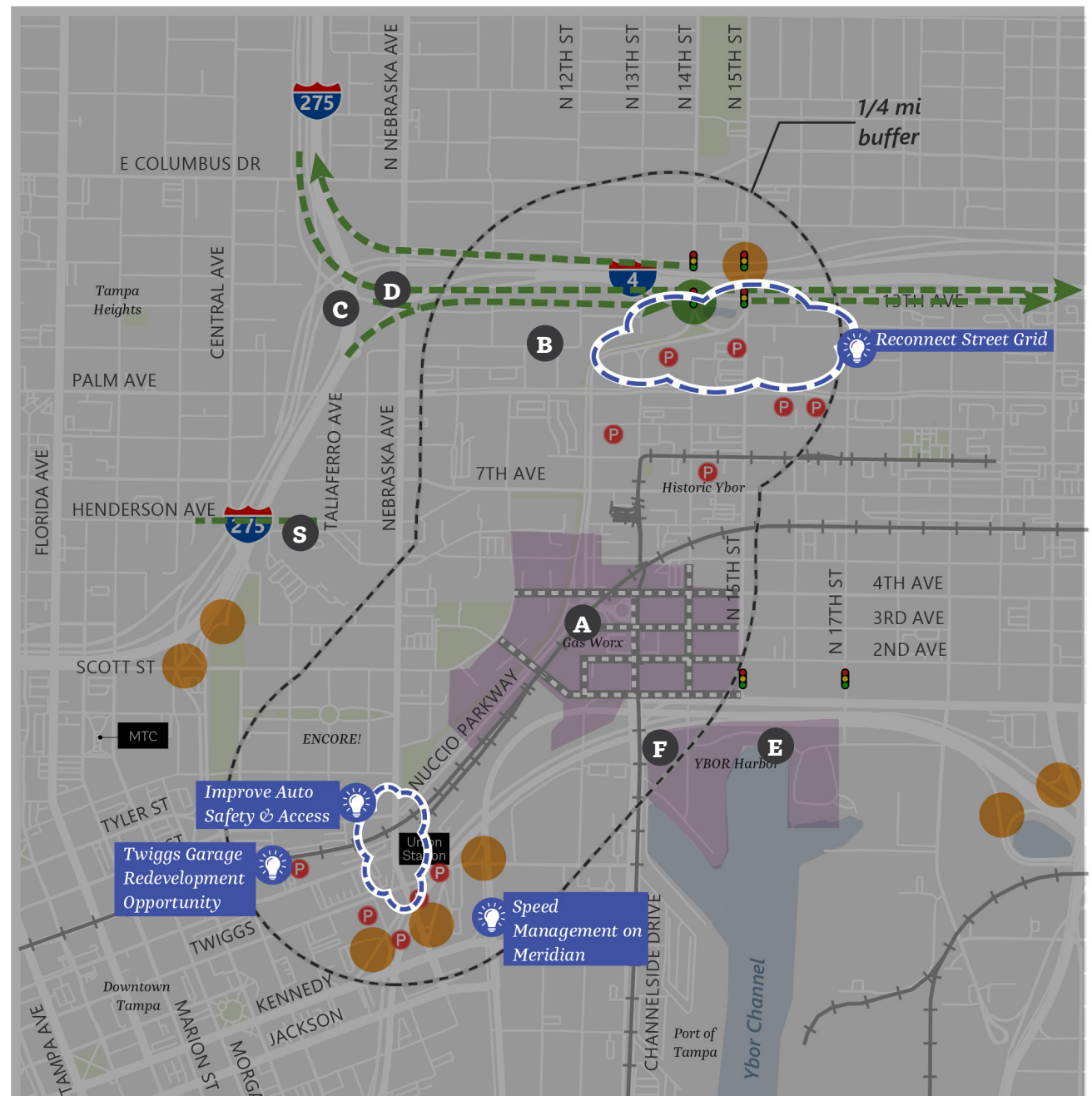
- Interstate/Limited Access Highway On/Off Ramp
- Parking Garages/Lots

Programmed & Planned Projects*

- Programmed or Planned Project
- Interstate/Limited Access Highway On/Off Ramp
- Highway/Road Project
- New Traffic Light
- New Streets (Gas Worx)

Recommended Projects

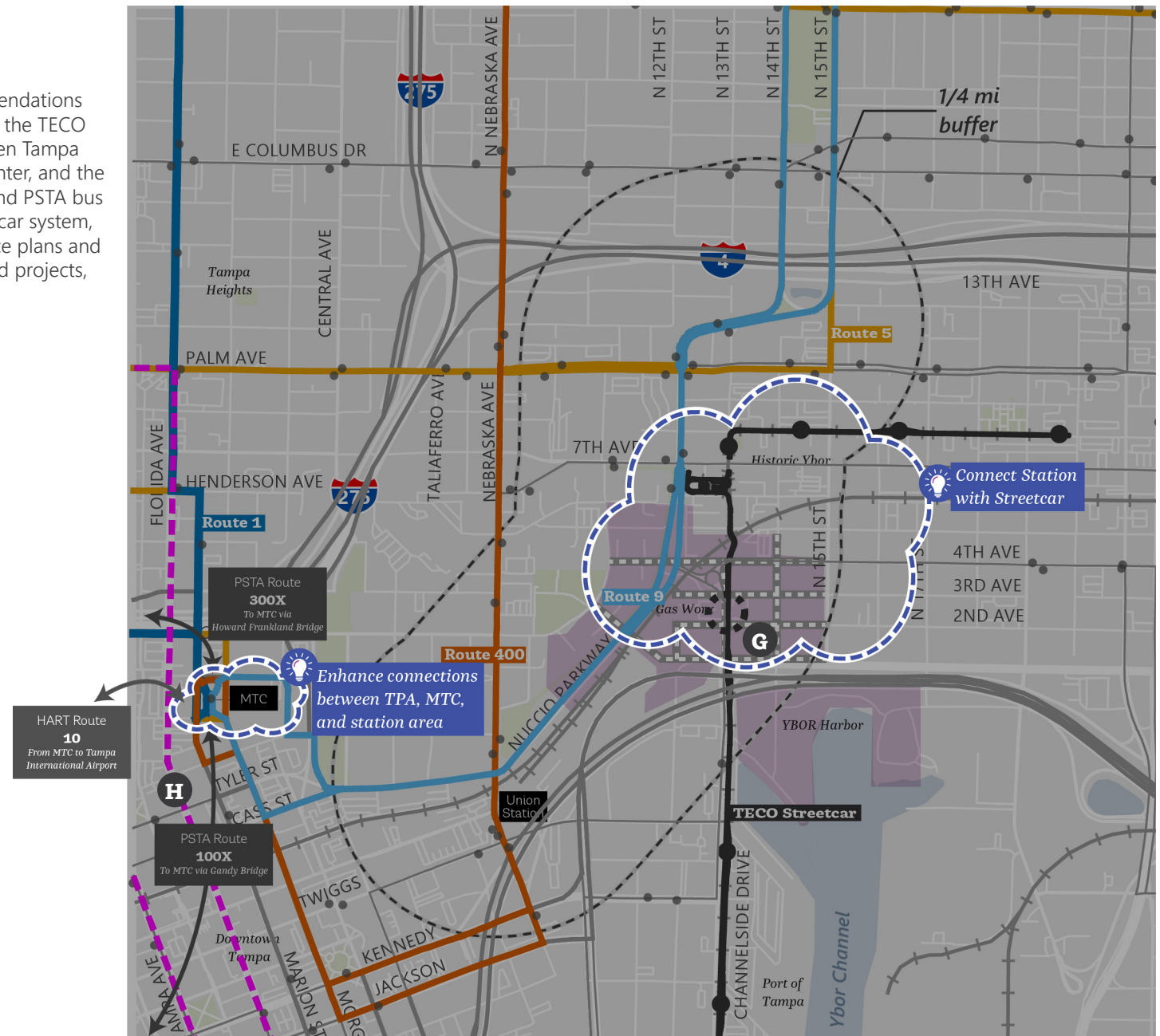
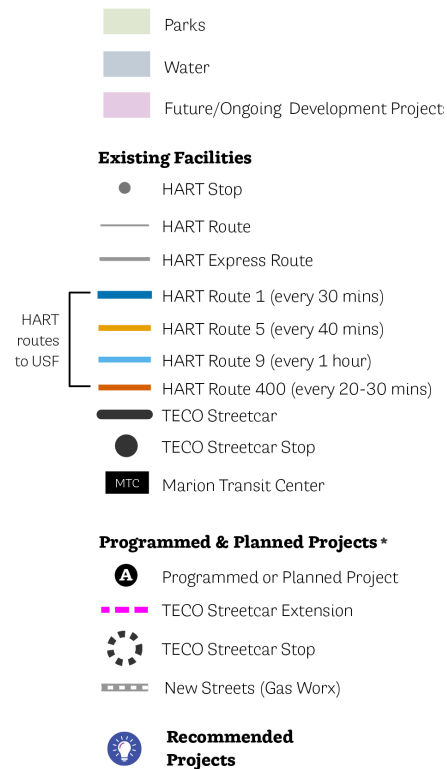
*See the Station Area Needs & Connectivity Plan report and Appendix D for more information.





Transit: Conceptual Connectivity Plan

The transit map presents potential recommendations such as connecting a Brightline station with the TECO Streetcar and enhancing transit links between Tampa International Airport, the Marion Transit Center, and the station area. It also depicts existing HART and PSTA bus routes, express routes, and the TECO Streetcar system, along with planned extensions. For reference plans and images related to programmed and planned projects, see Appendix D.



*See the Station Area Needs & Connectivity Plan report and Appendix D for more information.



Bicycle & Shared Use Paths: Conceptual Connectivity Plan

The bicycle and shared use path map focuses on improving bike safety and access while enhancing connections to nearby areas such as ENCORE! and the Channel District. It also identifies improved east-west and north-south routes throughout Downtown Tampa and Ybor City. The map shows existing and planned bike lanes, cycle tracks, and shared use paths.

For reference plans and images related to programmed and planned projects, see Appendix D.

- Parks
- Water
- Future/Ongoing Development Projects

Existing Facilities

- Bike Lane
- Cycle Track
- Trail/Shared-Use Path

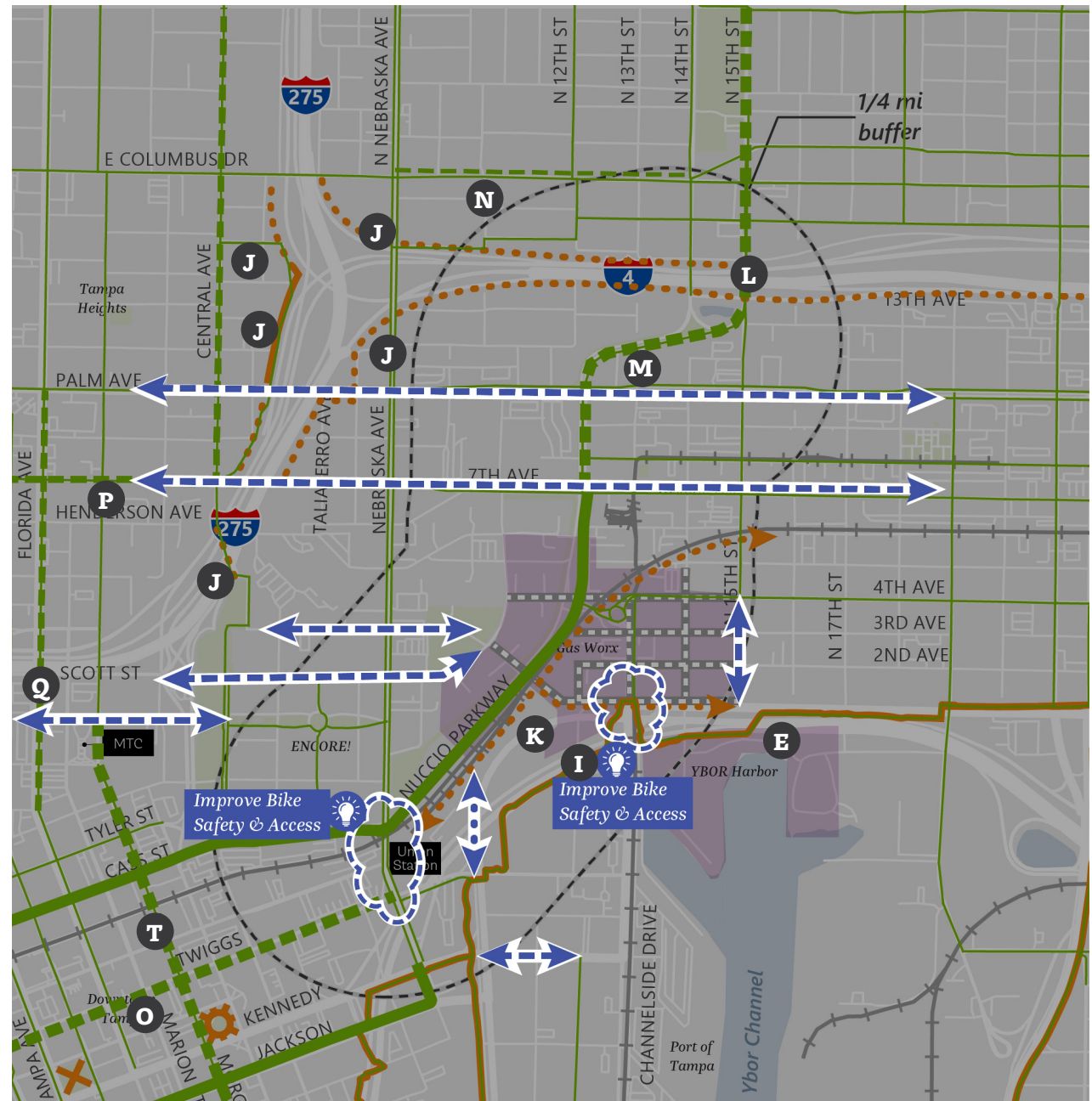
Programmed & Planned Projects *

- Programmed or Planned Project
- Bike Lane
- Cycle Track
- Trail/Shared-Use Path
- New Streets (Gas Work)

Recommended Projects

- Enhanced Bike Lane/Cycle Track
- Trail/Shared-Use Path

*See the Station Area Needs & Connectivity Plan report and Appendix D for more information.





Pedestrian & Shared Use Paths: Conceptual Connectivity Plan

The pedestrian and shared use path map emphasizes improving pedestrian safety and access and enhancing walkability along key corridors such as Nuccio Parkway. It also identifies opportunities for new mid-block crossings and traffic lights to strengthen connections between a potential Brightline station area, surrounding neighborhoods, and nearby destinations such as Ybor City and the Channel District. The map shows existing and planned sidewalks, trails, and shared use paths.

For reference plans and images related to programmed and planned projects, see Appendix D.

- Parks
- Water
- Future/Ongoing Development Projects

Existing Facilities

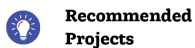
- Sidewalk
- Trail

Programmed & Planned Projects *

- Programmed or Planned Project
- Sidewalk
- Trail/Shared-Use Path
- New Streets (Gas Worx)

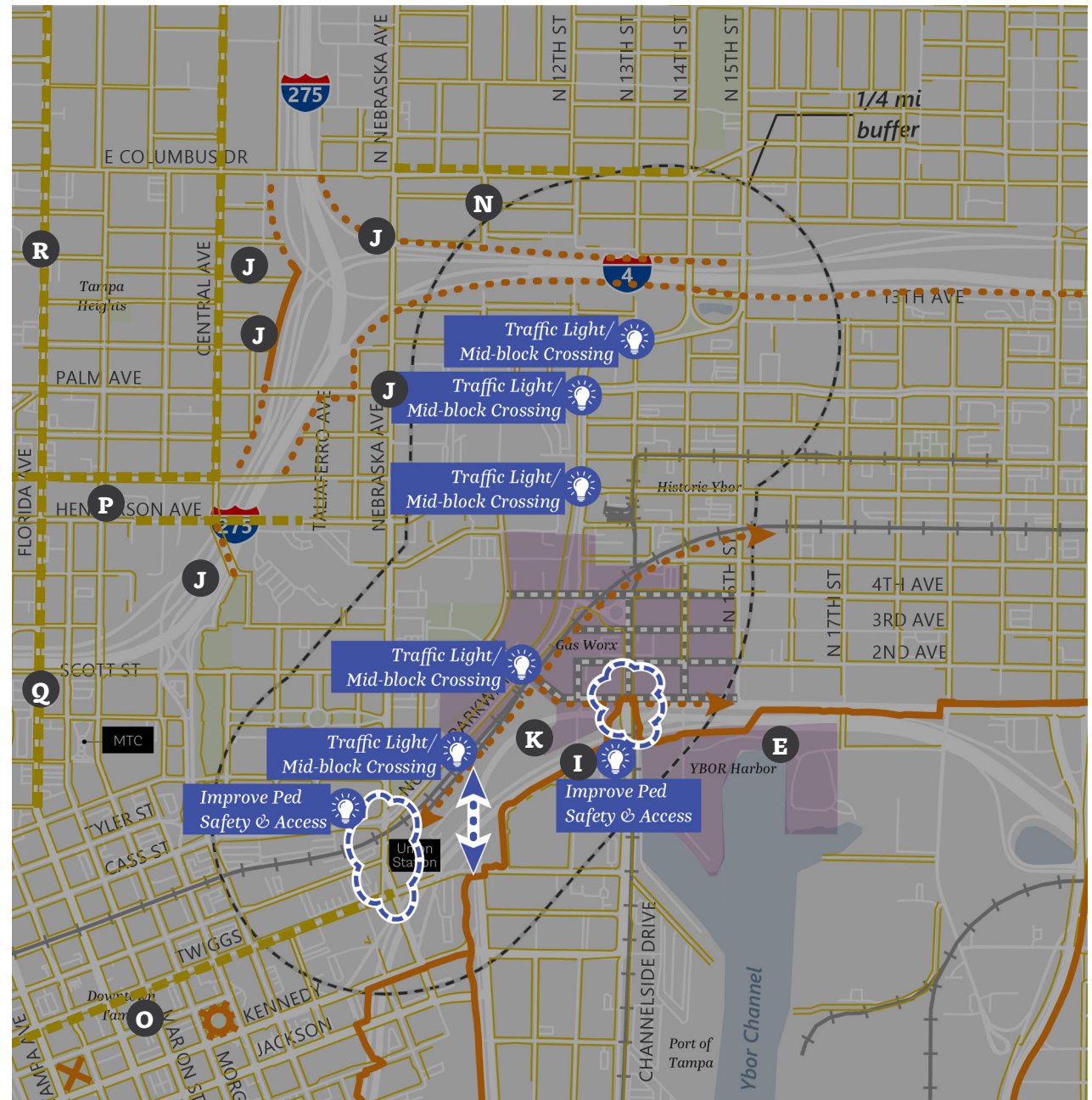
Recommended Projects

- Sidewalk
- Trail/Shared-Use Path



Recommended Projects

*See the Station Area Needs & Connectivity Plan report and Appendix D for more information.



Next Steps & Local Agencies Priorities

While Brightline's extension to Tampa and station development may take several years, the conclusion of this initial planning phase signals the need for local agencies, including the Hillsborough TPO, City of Tampa, Hillsborough County, HART, and other partners, to prepare for future detailed design, multimodal integration, and implementation. Success will require close coordination with Brightline and proactive local action to ensure connectivity and urban integration.

Below is a roadmap highlighting Brightline-led tasks and local agency priorities over the next few years.

FINANCING AND FUNDING COMMITMENTS

While Brightline is ultimately responsible for securing financing and funding commitments related to the service, local agencies can look for partnership opportunities and consider how funding may work for multimodal improvements outside of the station itself.

STATION LOCATION PLANNING

Local agencies can prepare for the station location through coordination with Brightline, be ready with needs for the station itself as it goes through the development review process, and prepare for connectivity to the station once established.

STATION AREA MOBILITY PLANNING

Local agencies can begin to further refine the needs identified in this study, determining what next steps

need to happen and their priority. Prior to the station design process, this could include additional planning efforts to incorporate multimodal access, wayfinding, lighting, technology, parking, transit connections, curbside management, and land development regulations, or historic preservation standards.

STAKEHOLDER ENGAGEMENT

Additional stakeholder engagement can be conducted by the local agencies to refine station access strategies, ensure public needs are identified, build community support, form partnerships with tourism and business organizations to maximize economic impact from the station area development.

REGIONAL MOBILITY GOAL ALIGNMENT

As planning for a Brightline station advance, local agencies should coordinate on other regional rail studies and and local transit initiatives. Any supporting projects that are identified can be incorporated into agency work programs and capital improvement plans

for funding and implementation. Transit integration planning to promote cross service connections can be discussed and determined.

DESIGN & CONSTRUCTION

While the station design, permitting, and construction phases are underway and completed, the local agencies can support infrastructure coordination and ensure integration with local development and transportation projects.

OPERATIONAL READINESS

As opening day operations get closer, local agencies can continue to prepare for first/last mile solutions and supporting connections and integration with other transit services. Local agencies can coordinate on station opening marketing efforts and economic development strategies to boost rider awareness and successful integration with other transit services.



