

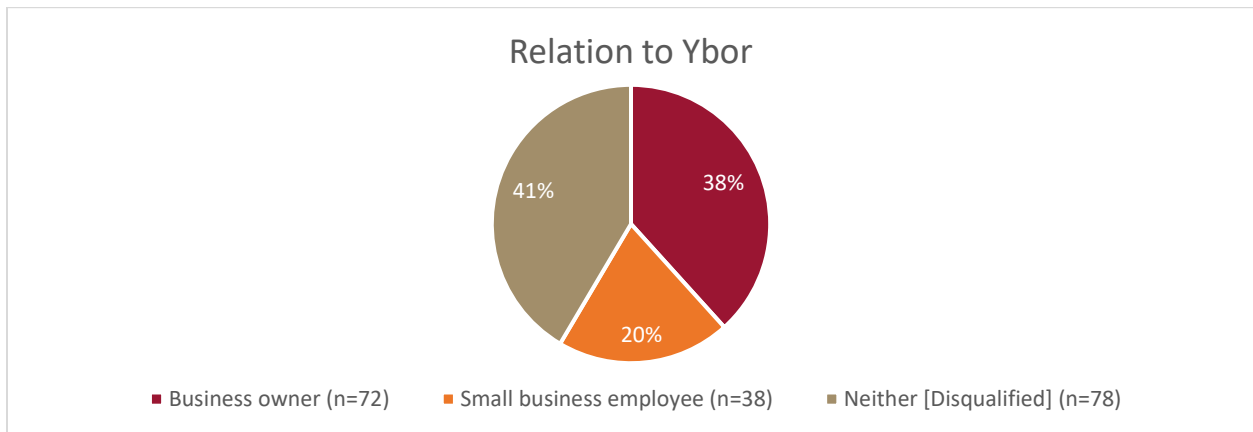
COVID-19 YBOR SMALL BUSINESS AND WORKER SURVEY REPORT

INTRODUCTION

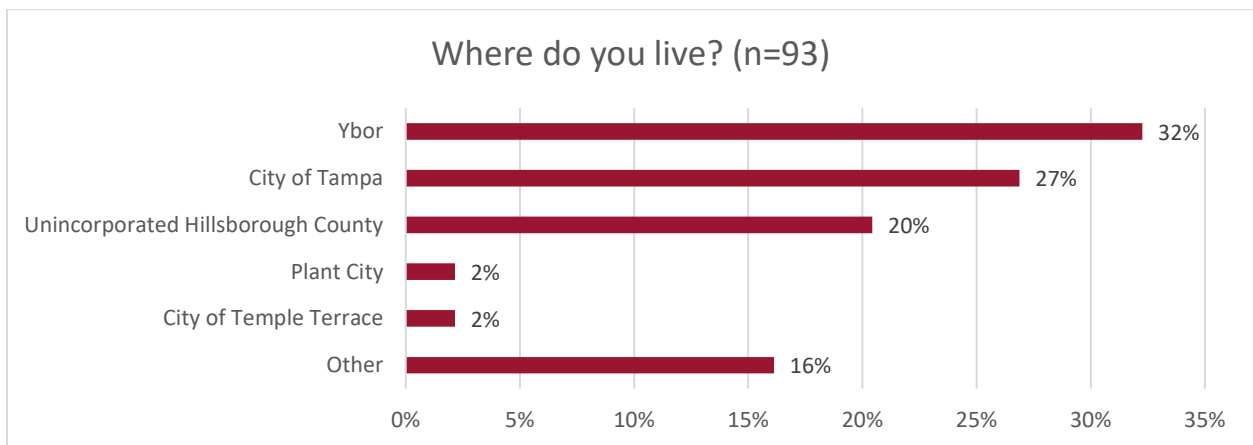
The Ybor City Development Corporation engaged business owners and employees in a survey of their experiences during the COVID-19 pandemic. The primary objective is developing an understanding of the impact on these community businesses and assess how best to help. There was a total of 110 valid responses, and the following report details those survey responses; for clarification, each graph also includes the total number of responses per question.

COVID-19 SURVEY

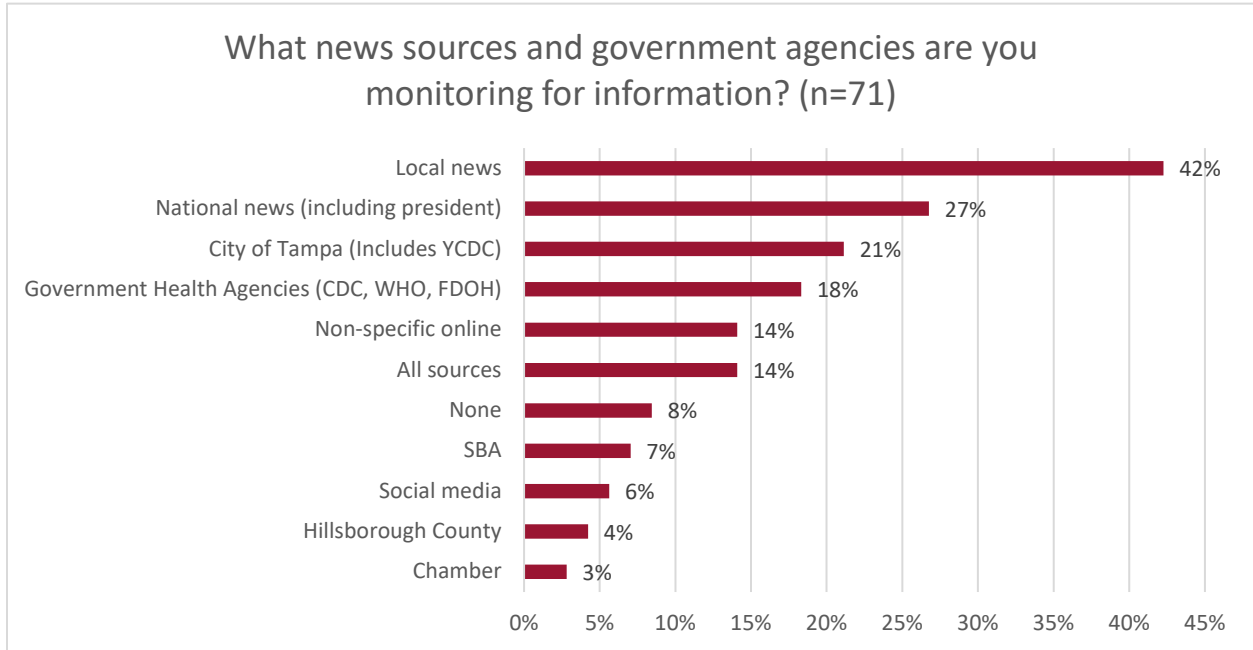
Two qualifying questions aimed to filter out those that are not business owners or workers in Ybor City. Those that met neither criteria were disqualified (a total of 78 respondents) from participating in the survey, leaving 72 business owners and 38 employees to continue into the COVID-19 survey.



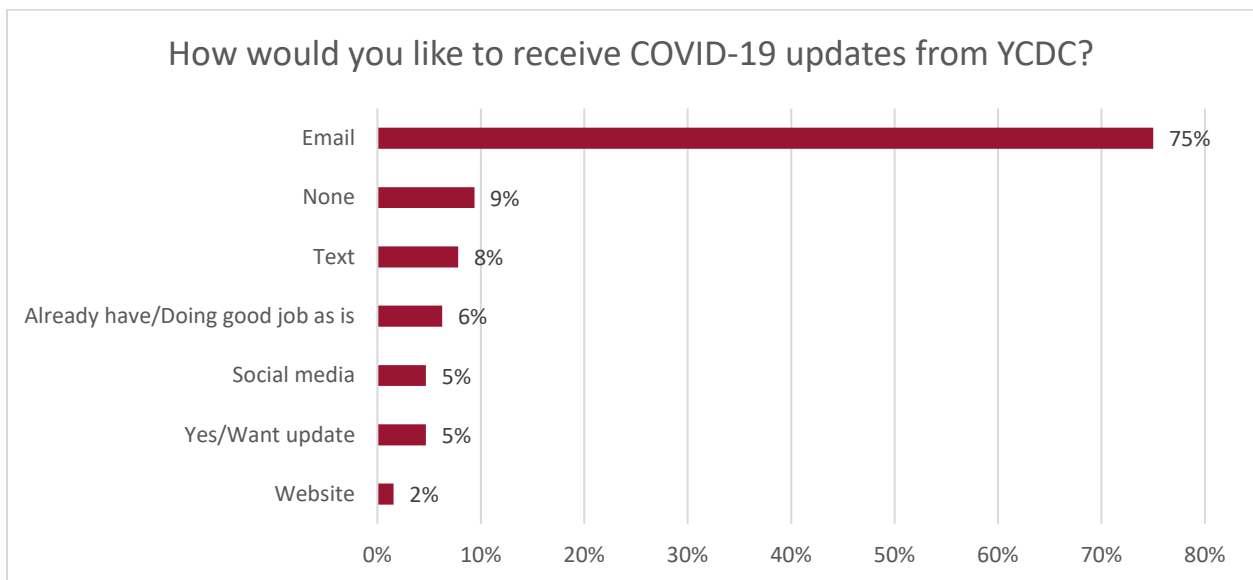
Respondents, despite all working within Ybor City, reside in several locations. Almost a third (32%) live and work in Ybor, while more than a quarter (27%) still live in Tampa. Although many of the 'other' answers also live in Hillsborough County, there were some respondents that reside in neighboring counties and even a few different states.



Business owners and employees were asked to list where they receive news about COVID-19. The responses were classified into the categories featured in the graph below. Many of the respondents cited multiple sources, and that is reflected in the percentages. The majority (42%) have been looking to local news sources, including local news channels and newspapers, followed by national news sources (27%), and the City of Tampa (21%) as the third most popular news source. There were 8% of respondents that said they do not follow the news and 3% that look to YCDC specifically.

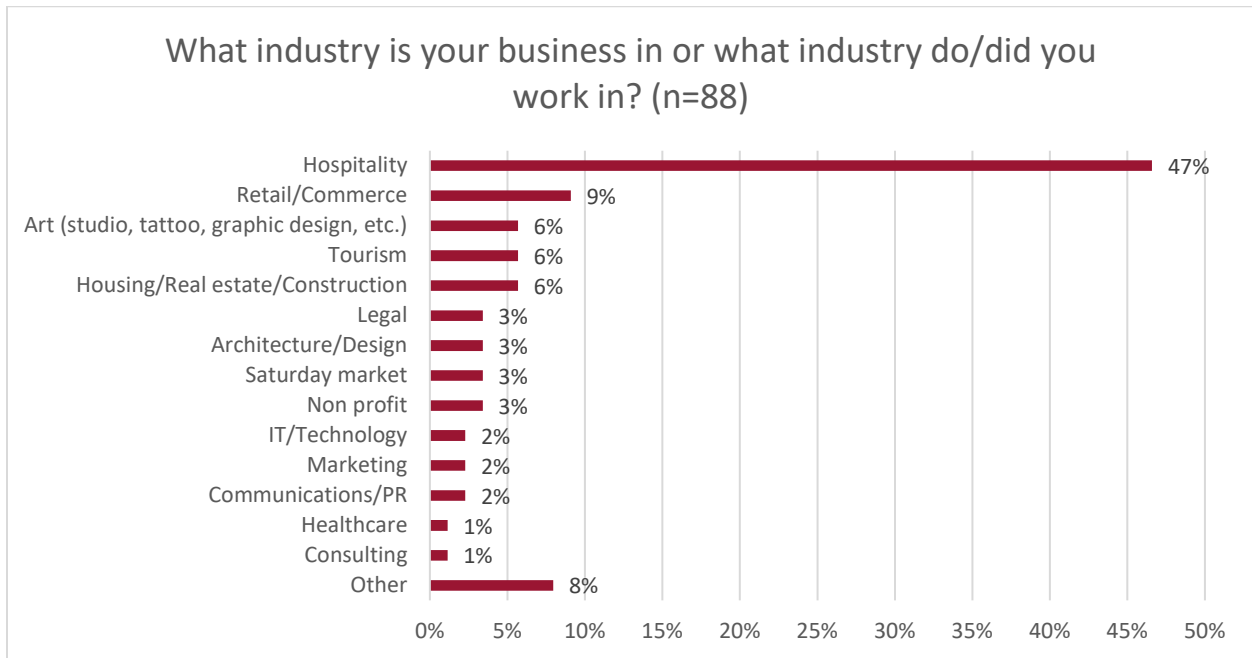


The respondents were specifically asked how they would like to receive COVID-19 news from YCDC; the majority prefer email (75%) as a means of communication.

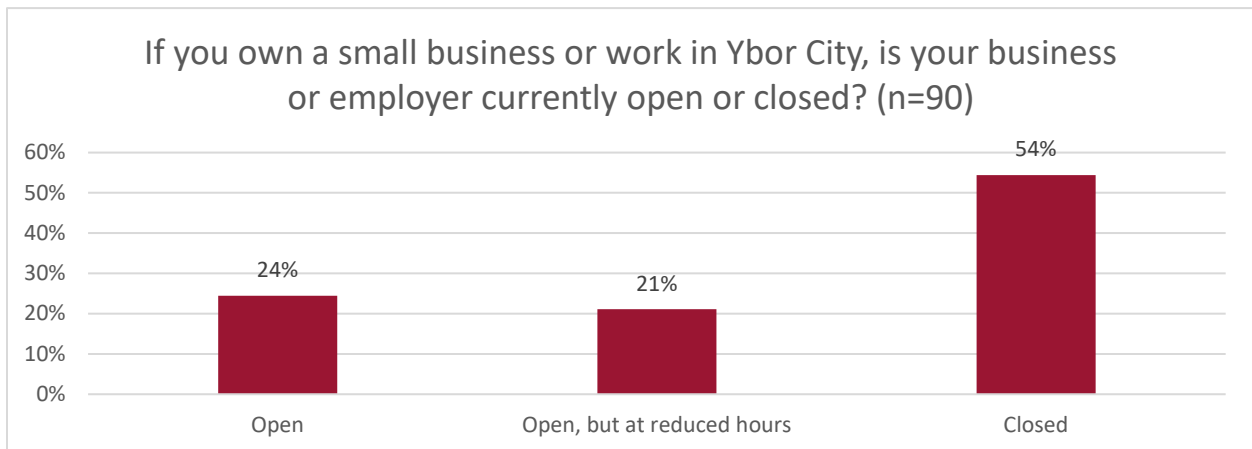


To understand the far-reaching effects of COVID-19, all respondents were posed the same general questions. Following that, the two groups – business owners and non-owning workers – were presented with tailored questions. The following graphs and analysis represents the total respondent base.

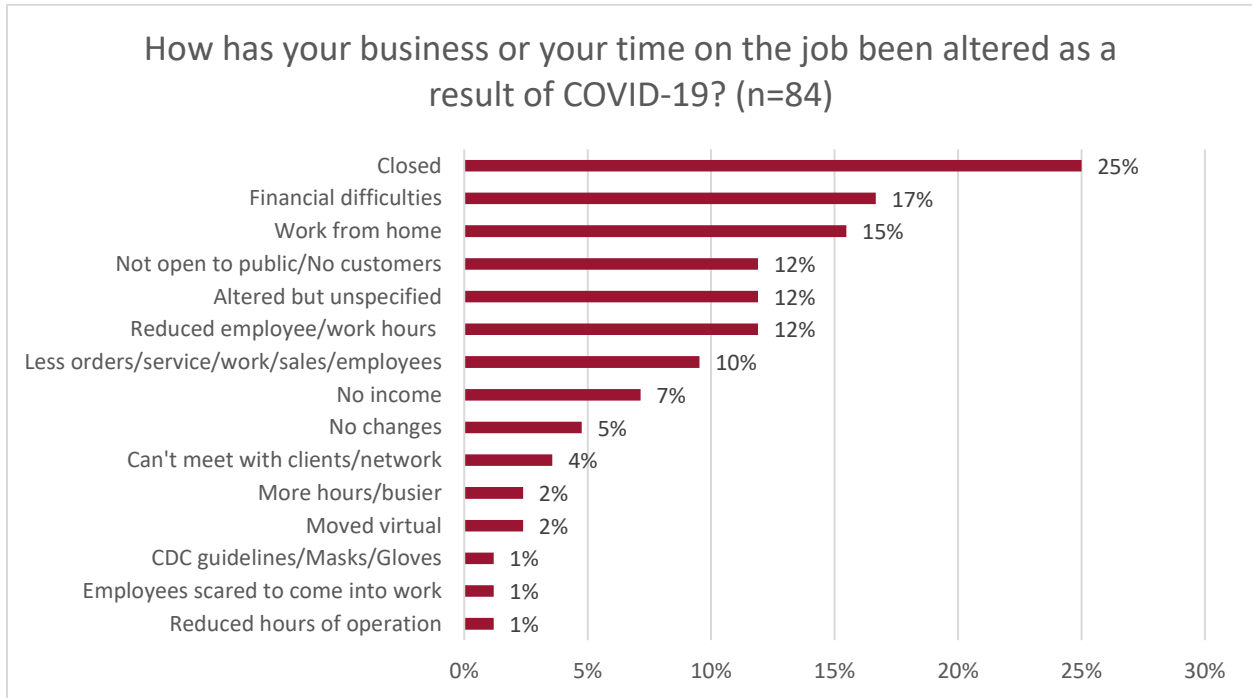
Respondents were asked to indicate the industry in which they work. This question was open-ended and then coded into categories. The graph below details all of the answers to this question; the majority (47%) indicated they are in hospitality, which includes restaurants, bars, nightlife, and events. Retail was the second largest industry in which respondents work (9%). The third-largest response has a three-way tie at 6% for: art, tourism, and housing-related jobs. The 8% whose responses were coded into “other” includes one-off jobs in fields relating to automotive, education, fitness, parking, and more.



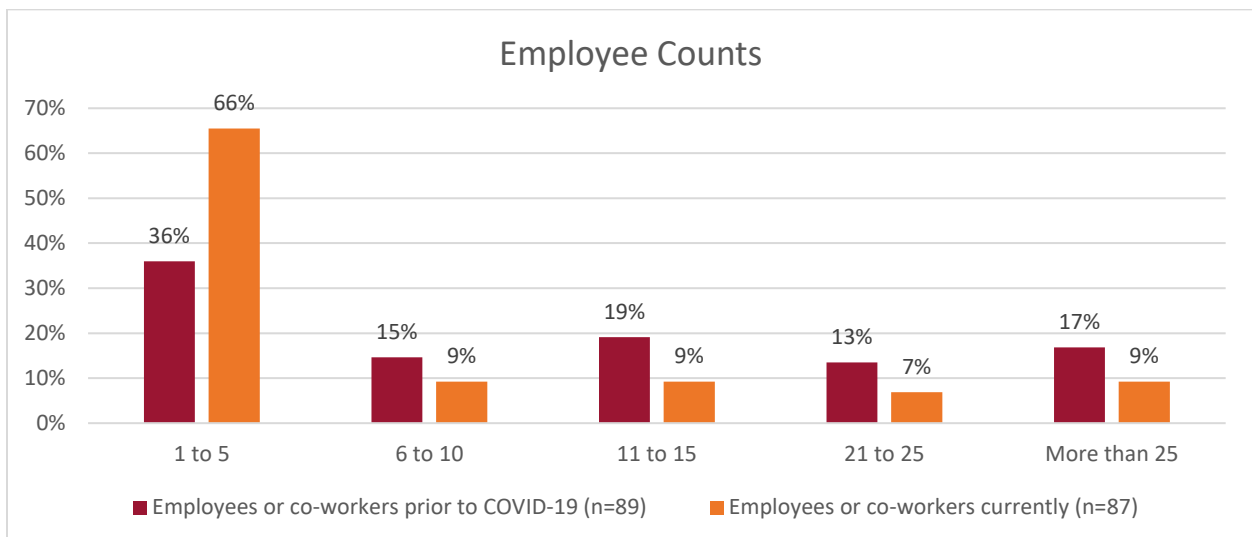
The vast majority of respondents (54%) indicate that the business they own or work for is currently closed. In comparison, nearly a quarter (24%) is still open, and the remaining 21% of businesses are open but have reduced hours.



While businesses in Ybor range from having closed completely to remaining open, there exists a continuum of ways in which businesses have been impacted. In an open-ended question, they were asked to specify how their business or work has been altered. The responses are coded into the categories in the graph below. The most frequent response was that the business is closed outright (25%), followed by financial difficulties (17%), working from home (15%), and much more.

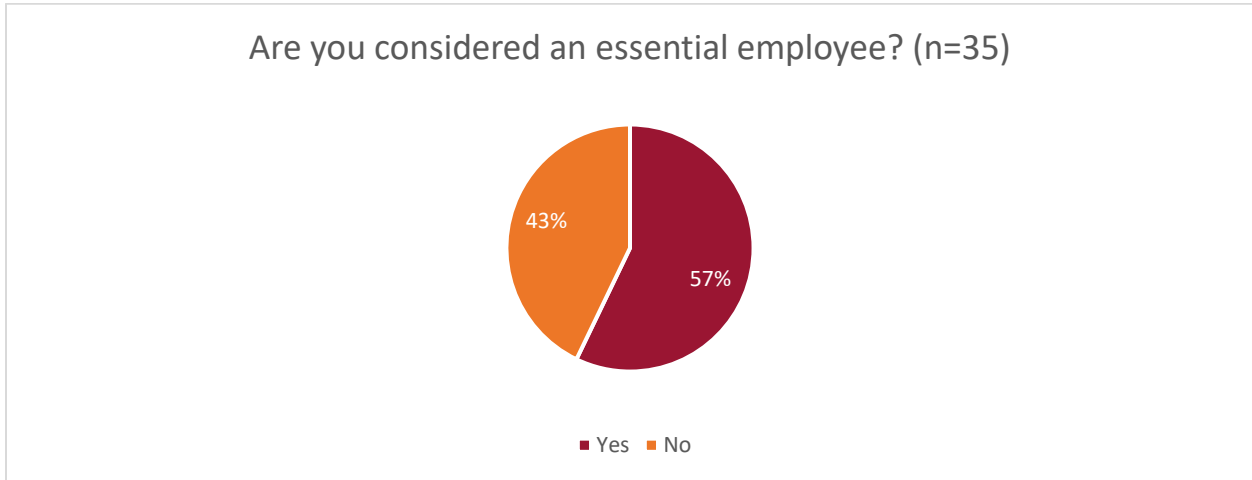


Business owners and employee-owners were asked to identify how many employees or co-workers they had before COVID-19 and then how many they currently have. The graph below compares the two responses. There has been a drastic reduction in the number of employees that businesses currently have.

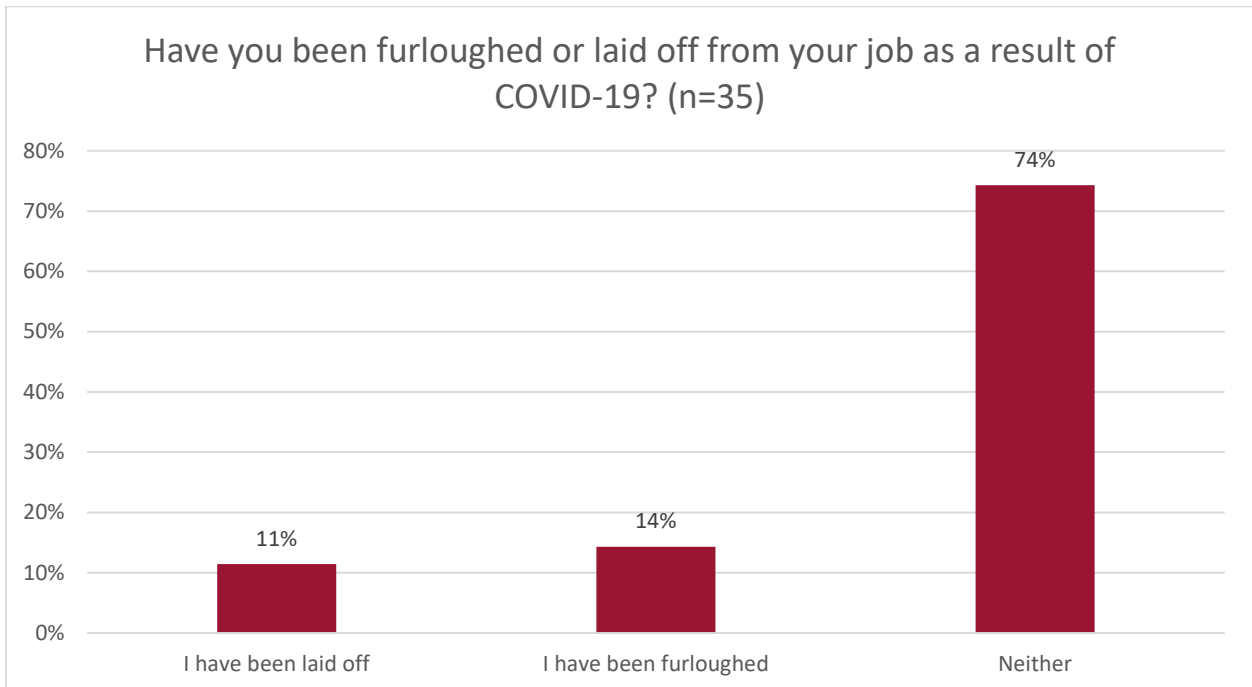


SMALL BUSINESS WORKERS

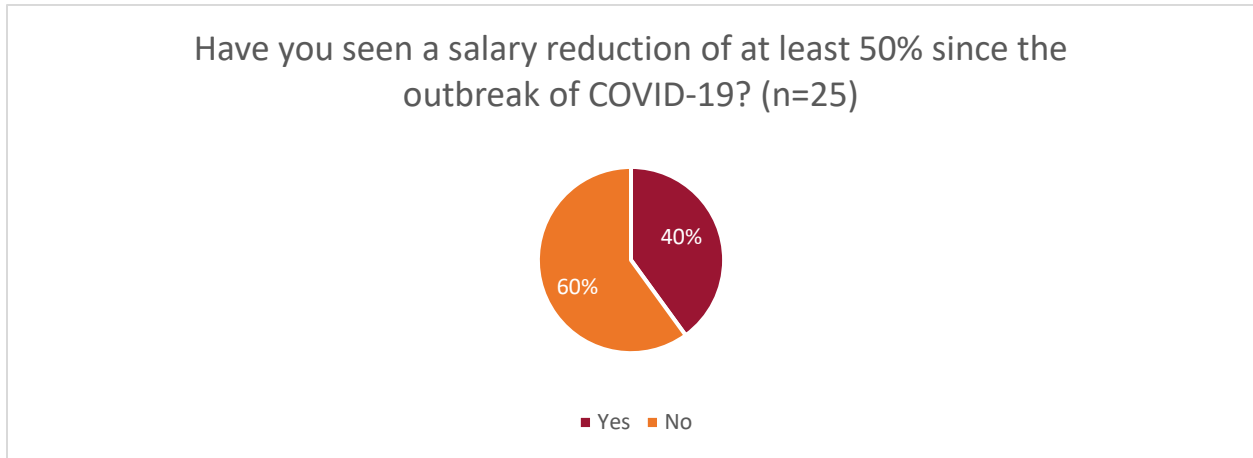
This section contains the responses to questions asked to those that specified that they are an employee working in Ybor. Respondents were asked whether they are considered an essential employee; the majority (57%) are while the remaining 43% are non-essential.



While previous survey data signals that many businesses are closed, employees have been reduced, and so have hours, employees were asked if they were furloughed or laid off because of COVID-19. Almost three in four (74%) were neither laid off or furloughed, but there was 11% who were laid off and 14% who were furloughed.

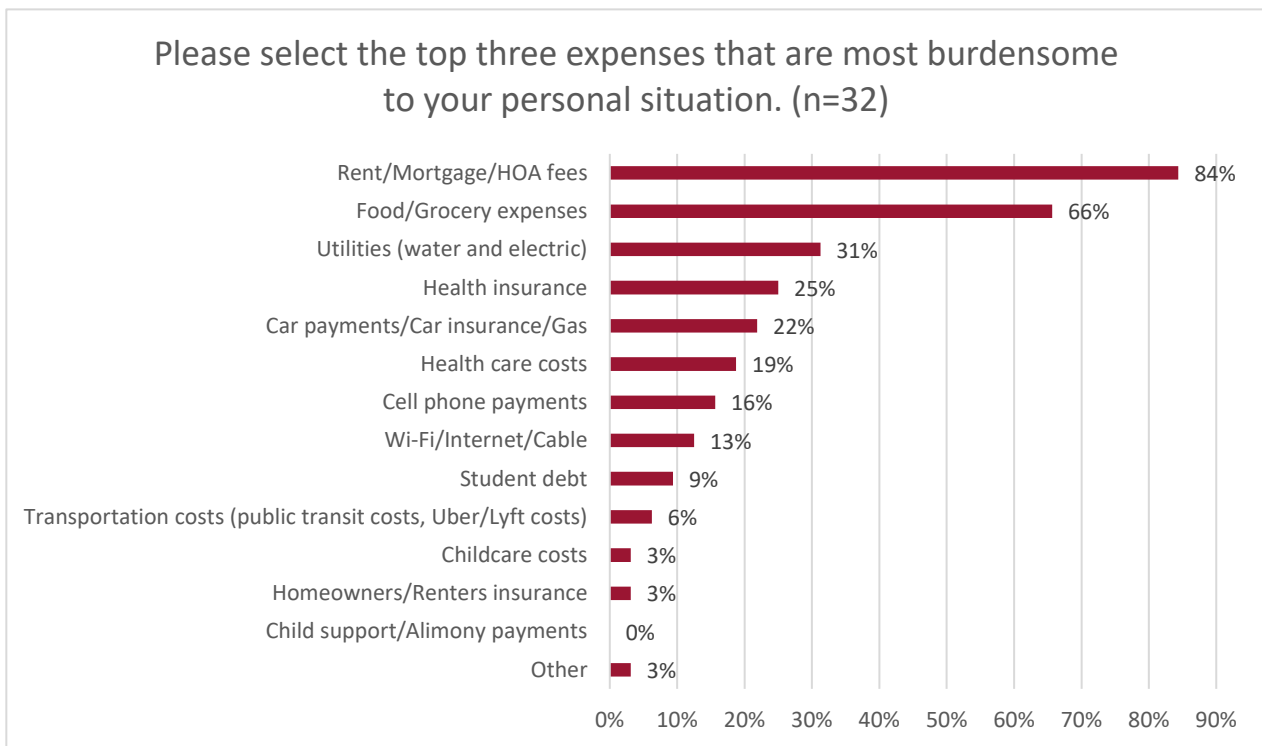


In addition to being asked about their status as an employee, they were asked about their income. The majority of those that answered (60%) this question said they had not seen a salary reduction of at least 50%; however, there was still 40% that have had a significant salary reduction.



Employees were asked to select their top three most burdensome expenses and then to rank them in order from most to least burdensome. The top three expenses for workers are rent, food expenses, and utilities.

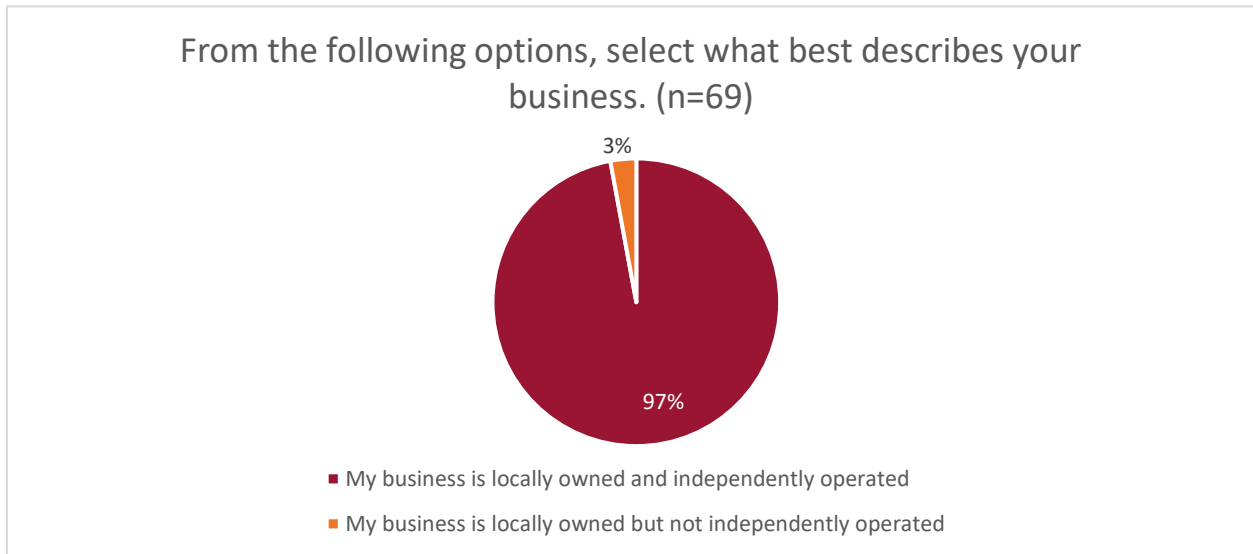
While they were asked to select their top three most burdensome expenses and then to rank them, the graph below shows what employees selected when asking to select which expenses are burdensome to their current situation. The majority of respondents have selected rent/mortgage/HOA fees (84%), and that aligns with the top ranking for the most burdensome expense, the second and third highest rankings also align with the graph below.



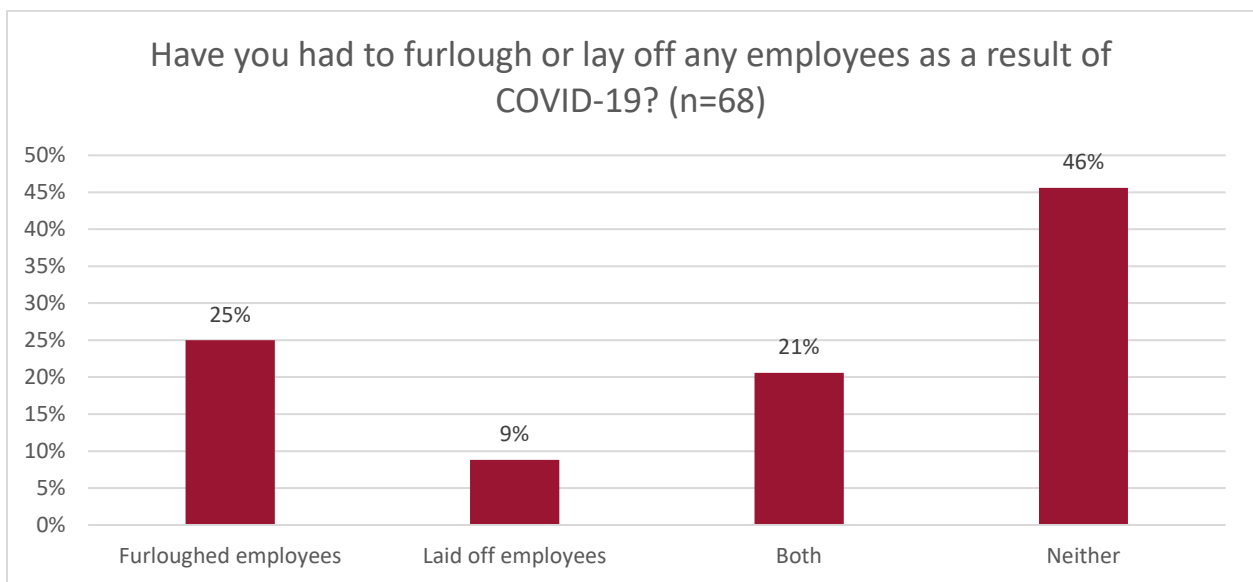
SMALL BUSINESS OWNERS

The business owner respondents were asked questions, which were separate from those posed to the employees. This section outlines those several questions and responses.

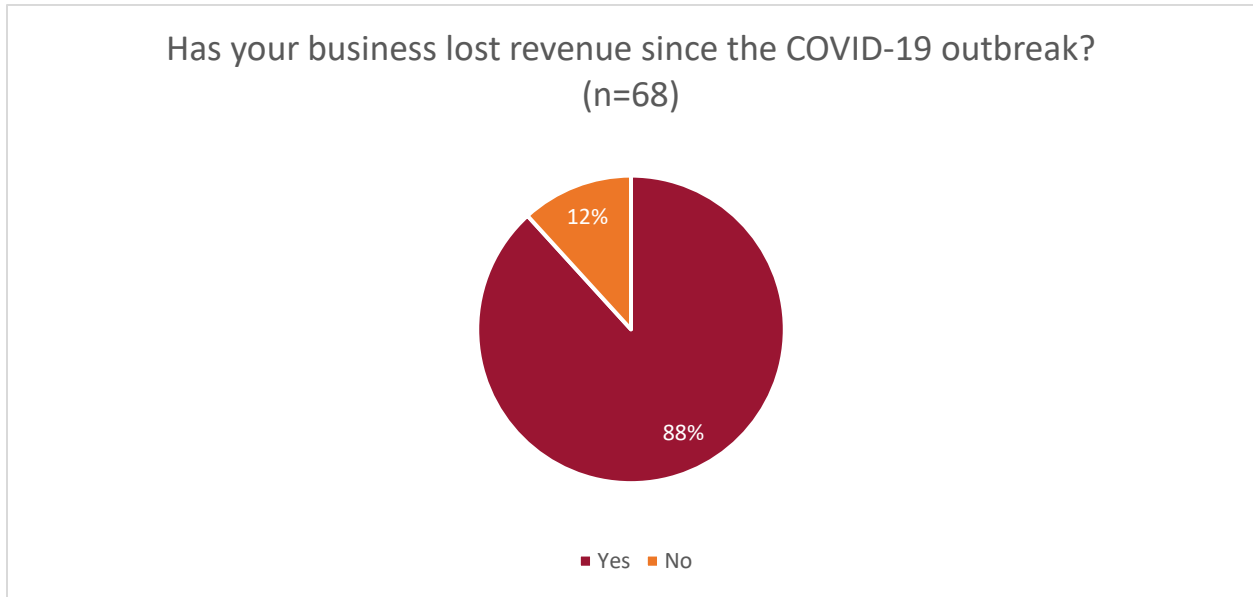
Although all the business owners are local to Ybor, they were asked to differentiate if their business was operated independently or not independently. Almost all business owners (97%) operate independently, with the remaining 3% do not operate independently.



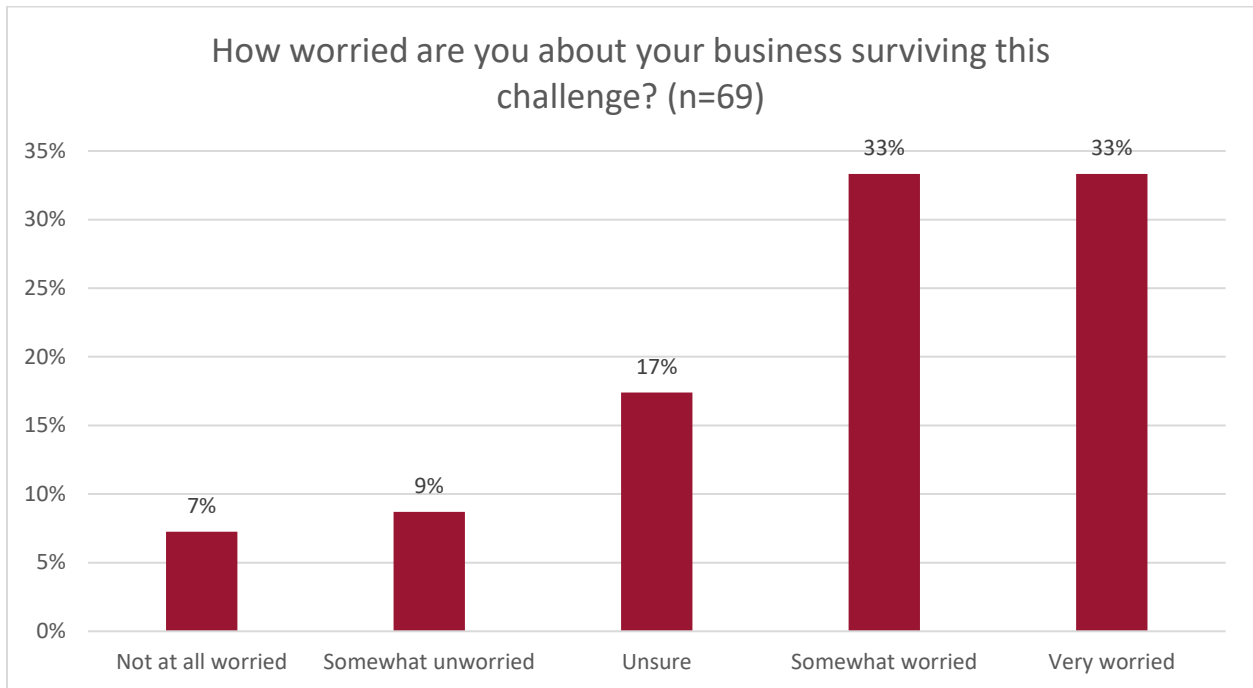
While the employees were asked if they were laid off or furloughed, business owners were asked how they are dealing with employees. Almost half of the business owners (46%) did not have to lay off or furlough employees, while there have been a quarter (25%) that furloughed employees, only 9% to lay off employees, and 21% stating that they have both furloughed and laid-off employees.



Employees were asked about their salary, while business owners were asked about their revenues. The survey asked them if they have lost revenue since COVID-19. Almost nine in ten (88%) said they had while the remaining 12% have not lost revenue.

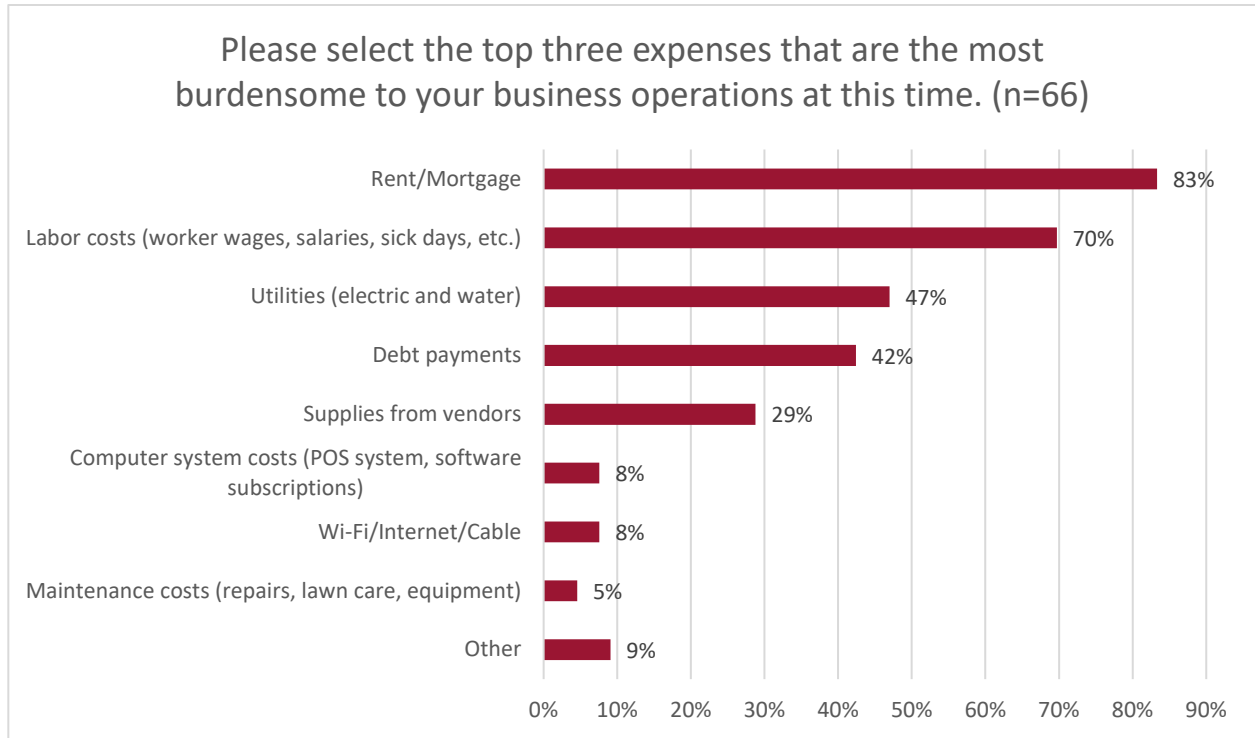


The business owners were asked if they were worried about their business surviving this pandemic. Roughly two thirds (67%) of the business owners are worried to some extent, with 17% unsure, and the remaining 16% not worried at all or to some extent.



Business owners were asked to select their top three most burdensome expenses and then to rank them in order from most to least burdensome. The top three expenses for them are rent, labor costs, rent, and debt payment.

The graph below shows what the business owners selected when asking to select which expenses are burdensome to their current situation. The ranking does align with the highest two percentage being rent (83%) and labor costs (70%), while the third-highest percentage is utilities (47%), and that is the fourth most burdensome in the rankings.



CONCLUSION

With its extreme concentration of arts, entertainment, nightlife, and dining, it is unsurprising that the COVID-19-induced economic damage to Ybor City is severe. More than half of the 68 business owners surveyed claimed that they had to lay workers off, furlough them, or some combination of the two; 66% are worried about whether their business can survive the shutdown. City of Tampa policymakers should give special consideration to Ybor City as a cultural asset to the community. Its vibrant landscape of businesses, which are overwhelmingly independently owned, thrives thanks to their collocation. If half were not to survive, the landscape along 7th Avenue would be duller, and the appeal of the arts and entertainment district significantly diminished. This impacts the citizens of the district in similar ways; with a third of respondents living in the district, sustained economic damage to Ybor City will have a downstream impact on citizens' quality of life. The city should also consider this as an opportunity for increased economic development in Ybor City – a more diversified economy for the area would help protect against economic shocks to one or two industries, as seen by the effects of this pandemic.

APPENDIX A: "OTHER" RESPONSES

QUESTION 6: THE COVID-19 PANDEMIC IS WIDESPREAD AND HAS IMPACTED PEOPLE IN ALL ASPECTS OF THEIR LIFE. PLEASE SELECT THE TOP THREE EXPENSES THAT ARE MOST BURDENSOME TO YOUR PERSONAL SITUATION. [EMPLOYEES]

- None of these really apply since I am still working.

QUESTION 12: THE COVID-19 PANDEMIC IS WIDESPREAD AND HAS IMPACTED BUSINESSES IN VARIOUS WAYS. PLEASE SELECT THE TOP THREE EXPENSES THAT ARE THE MOST BURDENSOME TO YOUR BUSINESS OPERATIONS AT THIS TIME. [BUSINESS OWNERS]

- Lost income to owners and employees
- Consistent income
- Weekly income as a business at Ybor Saturday Market
- Upgrade costs from improvements that were planned and started before this disruption.
- Advertising
- I don't want my customers to forget me!

QUESTION 16: SELECT THE AREA IN WHICH YOU RESIDE.

- Pasco
- Carrollwood Village
- seffner
- South Seminole Heights
- Lutz
- Lakeland
- polk county
- Seminole heights
- Fort Lauderdale
- New Port Richey
- St Petersburg
- Oldsmar
- Brandon
- seffner
- State of Ohio

APPENDIX B: OPEN ENDED RESPONSES

QUESTION 14: WHAT INDUSTRY IS YOUR BUSINESS IN OR WHAT INDUSTRY DO/DID YOU WORK IN?

- communications
- Art 🎨 Gallery and Studio
- bar
- Graphic design
- Call Center
- Housing
- Education
- Fitness
- Hospitality
- Real estate
- Bar
- hospitality
- Hospitality/Bartender
- Nightclub
- Hospitality / Nightclub and Events
- restaurant
- Real Estate House Rentals
- Bar/restaurant
- Service
- Nonprofit
- Customer service
- Parking
- Hospitality
- Restaurant
- Restaurant
- Restaurant and Pub
- Premium Tobacco manufacturing and sales
- Restaurant/Bar
- Ybor City Saturday Market vendor
- Retail Clothing Gift Shop
- Motorcycle Shop
- "Tour industry.
- Ybor City Walking Tours"
- Consulting
- Restaurant
- Food
- Restaurant
- Architecture
- commerce
- tourism

- Restaurant
- Restaurant
- Restaurant
- Restaurant/ hospitality
- Tattoo
- restaurant
- Marketing agency.
- bar/restaurant
- Retail
- Food service
- Retail/resale clothing
- import
- Communications
- Restaurant
- Communication and PR
- technology
- tattoo industry
- Retail
- Financial Technologies
- Hospitality/Restaurant
- Nonprofit /government office
- Farmer Market Produce Vendor
- "Hair salon
- And retail "
- Music Venue
- "Merchandising: Art and other products
- Production of Events: entertainment and education"
- Service industry
- Design, Architecture
- Real Estate
- Legal Services
- Construction of new homes and reconstruction of old homes
- architecture and interior design
- Hospitality
- Ybor City & Tampa Tours
- Tourism
- Legal
- Non-profit
- Legal
- Restaurant
- Nightclub
- entertainment, tourist sales of souvenirs
- Healthcare
- Photography

- BAR
- Ybor City Saturday Market
- Marketing
- Rental Homes
- Restaurant
- Hospitality
- Environmental

QUESTION 18: HOW HAS YOUR BUSINESS OR YOUR TIME ON THE JOB BEEN ALTERED AS A RESULT OF COVID-19?

- I work at home 4 days, at the office 1 day
- No Visitors
- closed
- Fewer service/order requests
- Employee hours have been reduced.
- Less work
- All services have been moved to virtual learning
- Closed to public
- Had to close
- Reduced
- Less employees IN office, half-staff working remotely.
- No income for any of my employees or myself
- We are without half of our regular revenue stream without the ability to sell product at the tasting room, only into retail distribution
- Mandatory shut down for a month. No income.
- We had to close down.
- yes
- No
- I only go in a couple hours to clean and do small projects. No more cash tips.
- Hours cut over 50%
- killed it
- No customer traffic due to closed businesses and shut down nightlife.
- Closed
- declined 90%
- 70% sales loss.
- 0 revenue
- We reduced our opening hours from 11-3am to 12pm-8pm.
- severely impacted our business we have been closed for 3 weeks.
- Totally impacted
- My regular job is fine (IT online) but my business Sat in Ybor Mark and Sun at shop in Pinellas Park is 100% shut down. #12 & #13 is 0, not 1-5.
- Closed completely as per governor's order. Difficult to pay coming months rents.

- Employees wanting to stay home despite the fact we're open for fear of the virus
- Cannot give tours at all. We are closed until further notice
- Working from home with more hours daily.
- We are closed
- I'm being giving no hours
- No dine in, only take outs. And UberEats deliveries, who keeps 30% of sales. Our Revenue is down by 80%
- not really
- remote working
- Less hours no tips
- No income
- No income
- Yes definitely
- Less employees, cut hours, more stress
- yes
- "1) Loss of clients, due to reduced need for marketing.
- 2) Not able to effectively network or meet with potential clients in person."
- destroyed
- Closed - This will not be over until everyone stays home for an extended period of time
- Less sales
- We have been forced to conduct business online only
- Not conducting business at all.
- Only work from the office 1 day a week, otherwise working from home.
- Has been closed completely for almost a month
- Everyone is working from home except me.
- all has been work from home
- it is currently closed.
- I'm still at the shop every day rearranging and making changes
- Disappeared
- Remote work, office closed to public.
- 100%
- We are closed.... so thats pretty "Altering"
- We've been closed, no business at all since March 9.
- schedule is non existing for business, I myself keep work on business regarding distribution and virtual Shows
- no income
- Closed since the week of March 22 2020.
- Reduced staff in studio.
- Commercial tenants are unable to pay rent.
- Our employees are working entirely remotely during this time.
- Some vendors are not working, or working less, so our personal time needed to run the business has increased.
- We have worked from home for the last 5 weeks. Minimal client meetings and site visits only for critical deadlines.
- Lost revenue

- "Close due lack of visitors to Ybor City and Tampa cruiships.
- "
- 100% shut down
- Working from home, less clients, less people paying outstanding invoices.
- Yes
- Working 2 days per week at home
- My business was ordered to close 30 days ago
- gone, closed. dead
- There is absolutely no work coming in
- 0 income, zero customers
- Physical office closed and all employees working remotely. Hours have not changed.
- Vacation rental homes are not being booked because of Governors orders on incoming visitors to the state.
- Sales fell 80%
- Business closed, no work hours
- Use masks and gloves. Workers maintain social distance when possible

QUESTION 21: WHAT NEWS SOURCES AND GOVERNMENT AGENCIES ARE YOU MONITORING FOR INFORMATION?

- 10 news
- BBC NEWS, TAMPA Papers
- cable tv
- CNN, BBC, REUTERS, NPR
- 5:30pm updates from President Trump.
- Local news, internet
- Local news/national news stations. Newsletters from my employer, the school board, utilities and other service providers.
- None
- Florida Dept of Health, City of Tampa
- All
- City of Tampa, bay news 9
- ALL
- None. They all stink.
- Internet
- Local news
- Local news
- city of Tampa, SBA, Bay News 9, Email
- Fox News
- City of Tampa, Face Book
- all
- Mostly online
- SBA website
- all sources available

- MSNBC, NBC, CBS, ABC, CNN, Tampa Bay Times
- TYT, Jimmy Dore, CNN, Democracy Now, Last Week Tonight, City of Tampa updates, Rep Kathy Castor weekly townhalls, general email updates from the city/state/gov't
- Google, CNN, MSNBC
- SBA
- Local news
- Tampagov.org, SBA
- None
- All
- CNN, CDC, City of Tampa
- tv, city site
- Cdc
- Abc. Facebook
- Abc news, Ybor city
- SBA
- CDC.gov, City of Tampa, Hillsborough County, various scientific websites.
- scanning for balance to the overwhelming doomsday narrative
- who.int, Dr Fauci, CNN
- CNN
- Local news - fox news
- CDC, Hillsborough County County Commissioners, ABC News
- City of Tampa, CDC, IRS
- Bay News Nine for Local Info
- Fox 13 Tampa
- none
- TampaAlert, all cable news channels.
- TV news, social media, websites and emails.
- As 1 owner self employed business, I don't qualify for anything.
- City of tampa
- CDC, City of Tampa, Hillsborough Country websites.
- News, emails, alerts, and chamber
- none. have little faith in any news
- Chamber and YCDC
- CDD, worldometer
- TV News, Tampa Bay Business Journal, Whatever government program links my accountant sends to me.
- CDC, local news and COVID website
- Local and nation daily news.
- Taking the MSM with a grain of salt. Doing our own research and talking with people in the areas most effected. The truth is quite far from what is being reported.
- Tampa Bay times, Bay news 9, Tampa text messages, national news (cnn, msnbc)
- CNN, abc action news
- CNN, fox13
- CDC website
- all

- Tampa Bay Times, CNN, NPR, Washington Post
- Whatever I can find each day
- Twitter, City of Tampa, WHO.
- CNN, ABC, St. Pete Times
- All of them....I have nothing else to do
- Bay news 9

QUESTION 22: HOW WOULD YOU LIKE TO RECEIVE COVID-19 UPDATES FROM THE YBOR CITY DEVELOPMENT CORPORATION?

- email
- Text
- email
- Website, Email
- Email
- No
- Newsletter via email
- Email
- YES,
- Email
- email
- email
- Mass emails
- Email or text
- E mail
- email
- Email is fine
- Email
- email would be prefered
- Obviously receiving them already
- Email is fine.
- Email
- I don't. I want this to be over.
- Email
- email
- email
- e-mail
- email
- na
- Weekly
- Fb
- Email
- Email
- Don't need any more - already drowning in info.
- not desired

- Website, Twitter
- Text
- email
- Email
- email
- Email
- email
- Email, as I am currently.
- Email
- I wouldn't.
- Email
- you're doing fine thank you
- email
- Email
- Email
- Email
- Email updates would be fine
- Email?
- Be good to have updates.
- Email and text is fine
- Email, text
- Email or fb
- Email
- Email
- email
- email
- email
- You are doing fine already
- Email