Biennial Downtown Tampa Worker and Resident Study 2020 Results

Conducted by HCP Associates
on Behalf of the Tampa Downtown Partnership

HCP
Research|Strategy|Marketing

TAMPA
DOWNTOWN PARTNERSHIP

Study *Background and Methodology*

Study established in 2008

Established as a baseline study; occurs biennially and is on the 7th iteration

Participation higher than average

Average resident count: 627
Average worker count: 807

Highest resident participation ever, which enabled neighborhood-level analysis

Highest worker participation in six years

Two online surveys

Historical content, relevant edits, and new questions based on new developments and offerings

*Residents working in Downtown to complete the resident survey

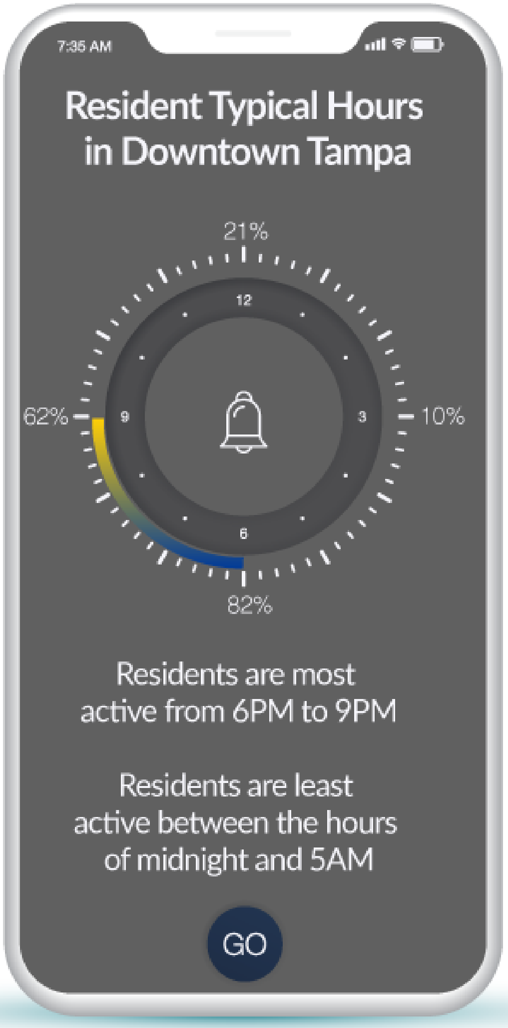
Total Respondent Counts over Time

Resident | Worker

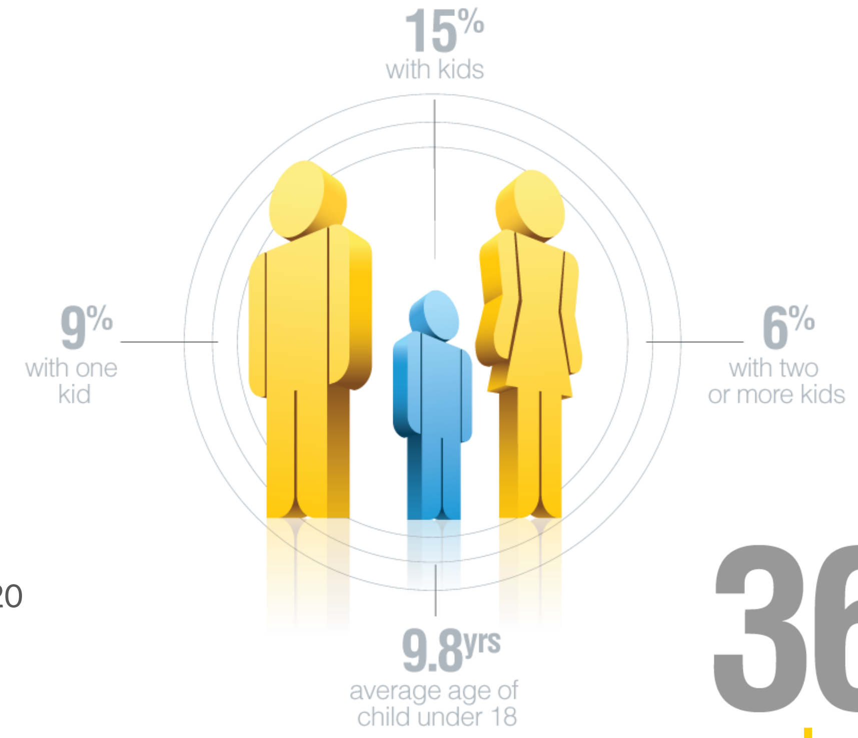
2008	2010	2012	2014	2016	2018	2020
219 | 1,075	541 | 809	429 | 731	631 | 1,036	441 | 618	624 | 566	**1,064 | 812**

Resident and Worker *Profiles*

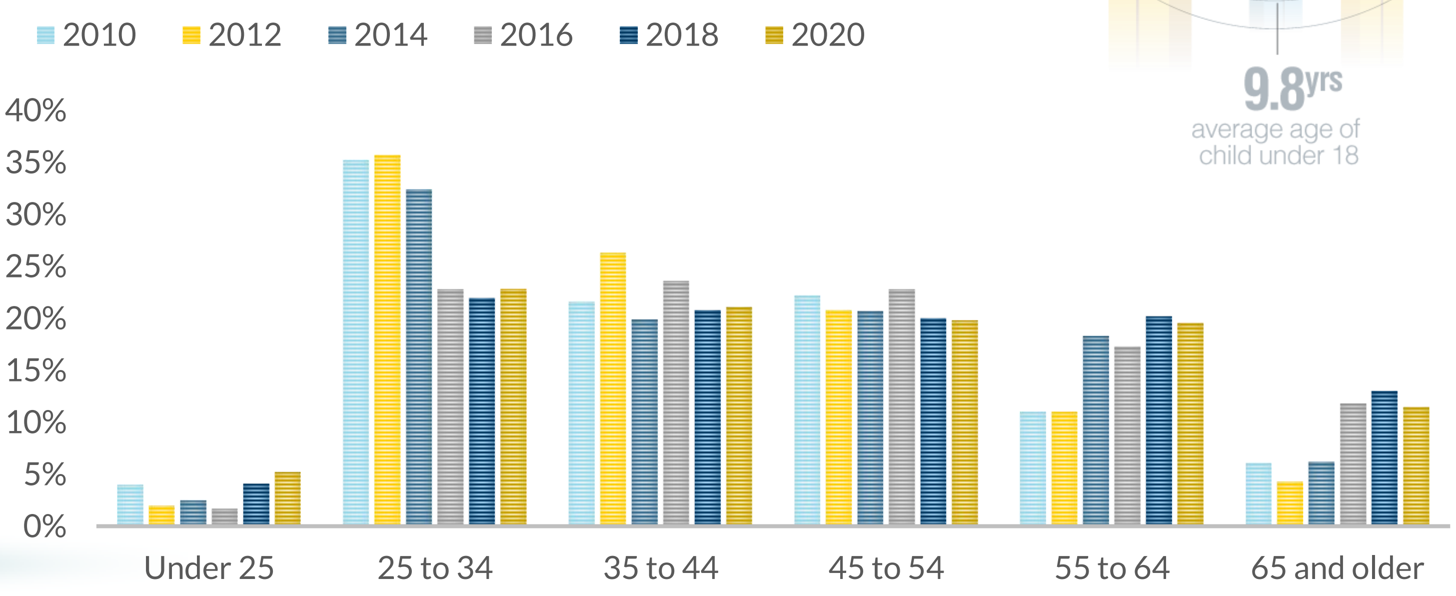
Resident *Respondent Profiles*



16% Moved into their current Greater Downtown Tampa residence in the last year

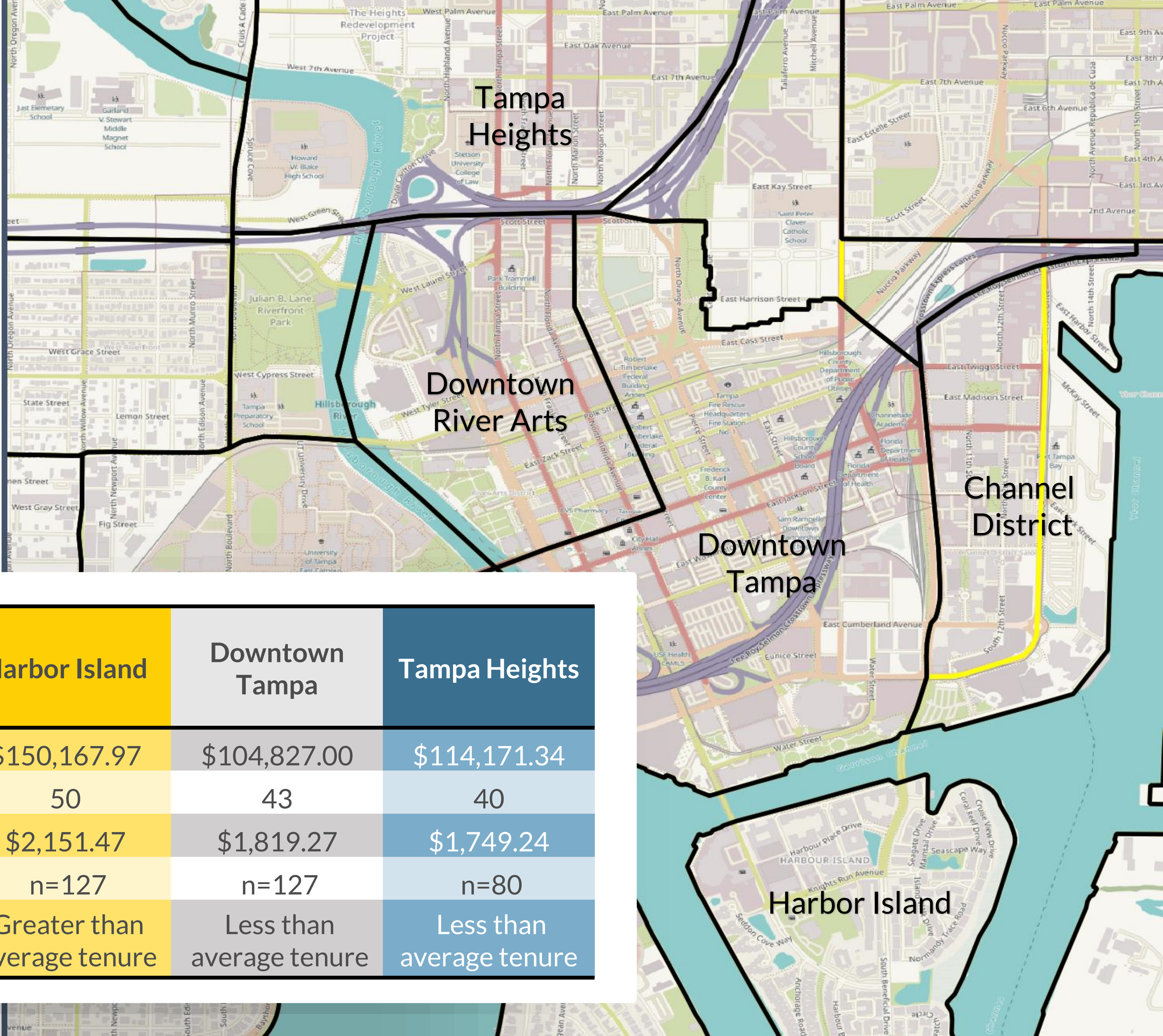


Residents Trend: *Age*



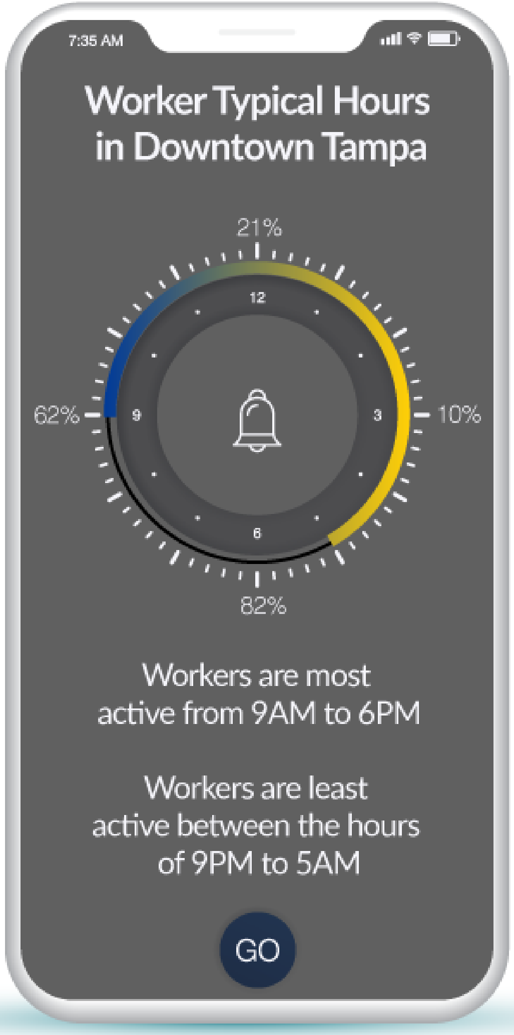
36% Have lived in their current Greater Downtown Tampa residence for more than five years

Neighborhood
Profiles



	Channel District	Downtown River Arts	Harbor Island	Downtown Tampa	Tampa Heights
Average HHI	$143,591.50	$148,316.33	$150,167.97	$104,827.00	$114,171.34
Average Age	45	47	50	43	40
Average Rent	$1,995.89	$1,907.97	$2,151.47	$1,819.27	$1,749.24
Sample Size	n=249	n=208	n=127	n=127	n=80
Tenure	Average tenure	Average tenure	Greater than average tenure	Less than average tenure	Less than average tenure

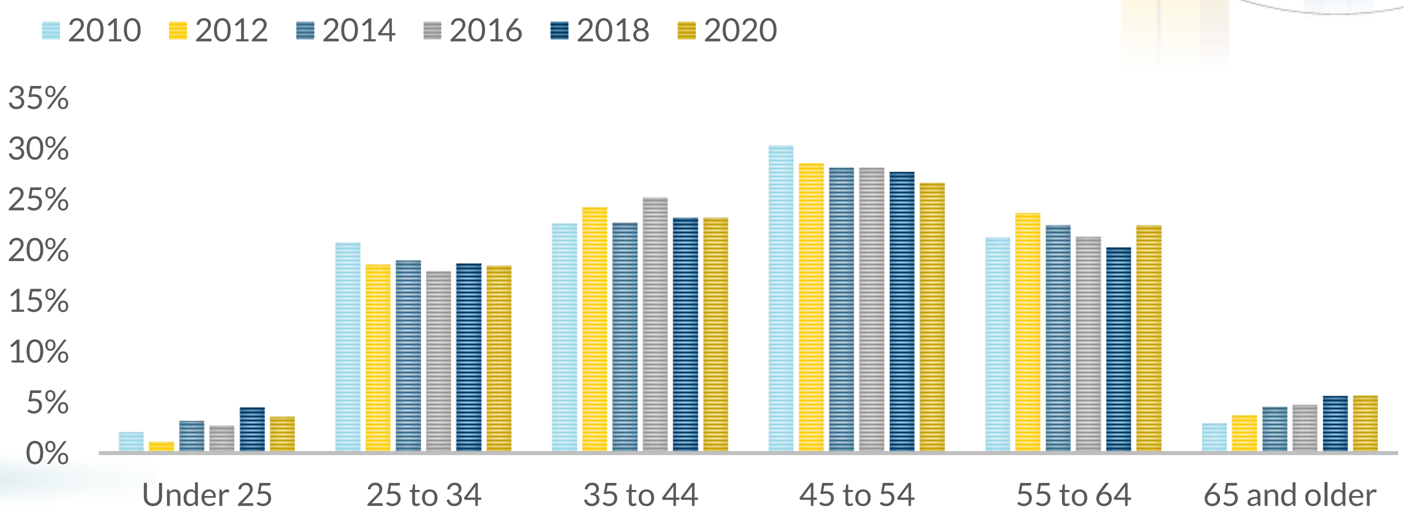
Worker *Respondent Profiles*



9% Started working in Downtown Tampa in the last year

42% with kids

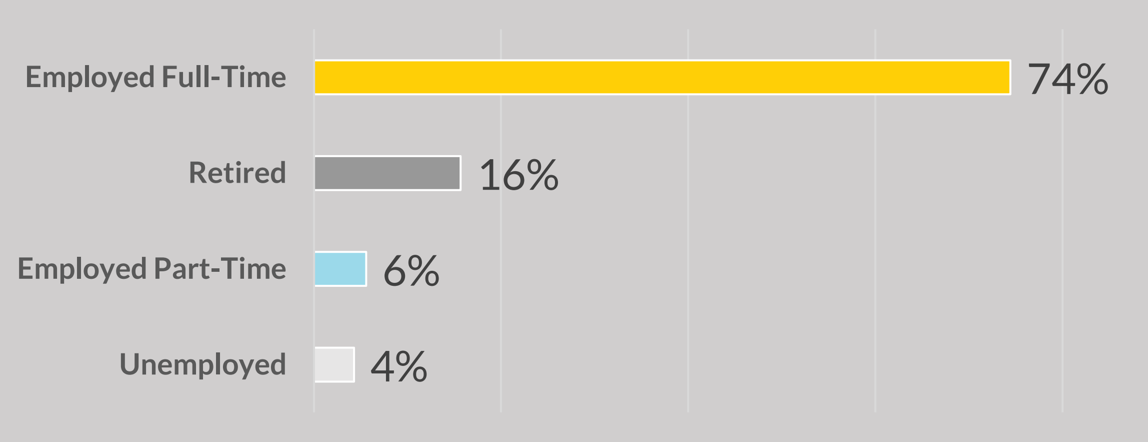
Workers Trend: *Age*

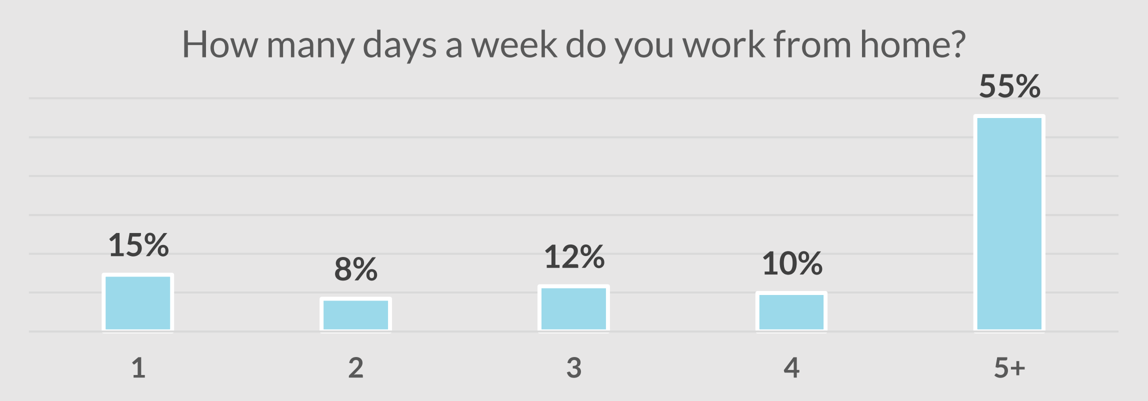


39% Have worked in Downtown more than 10 years

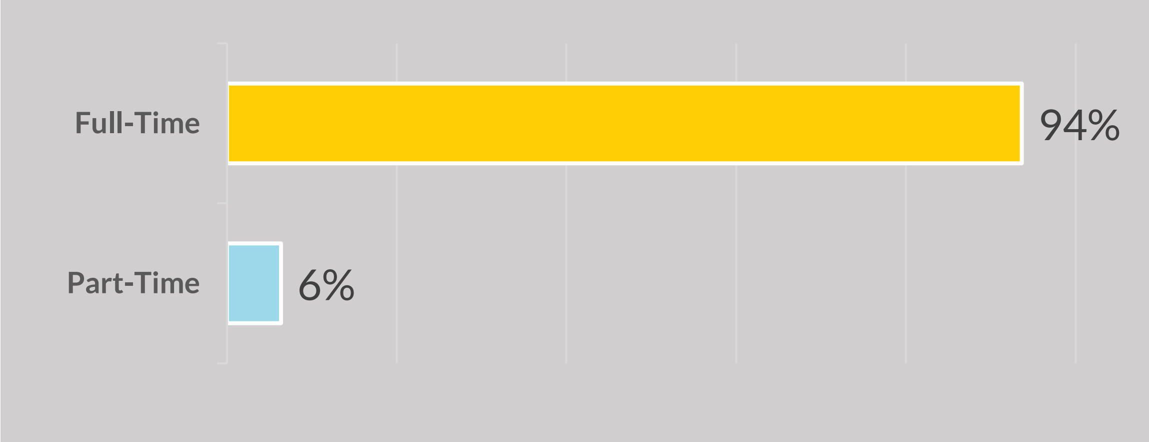
Workforce *Profiles*

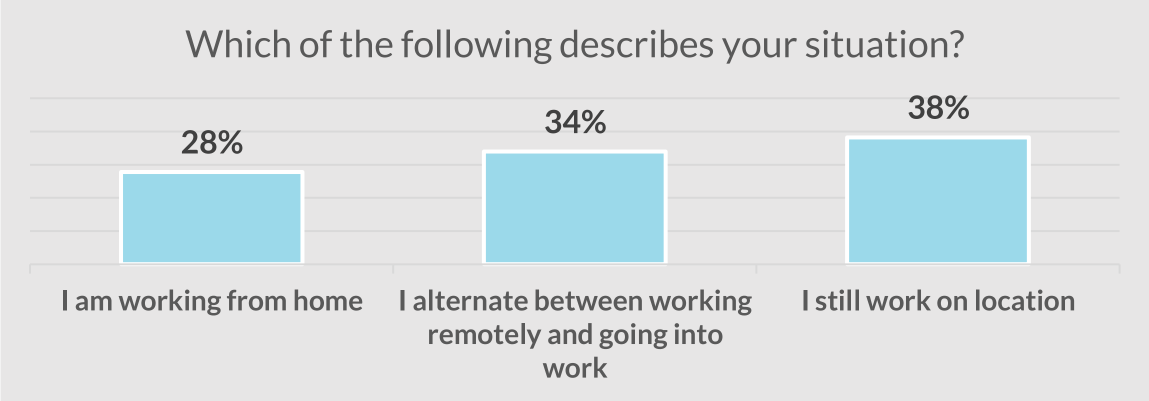
Residents





Workers





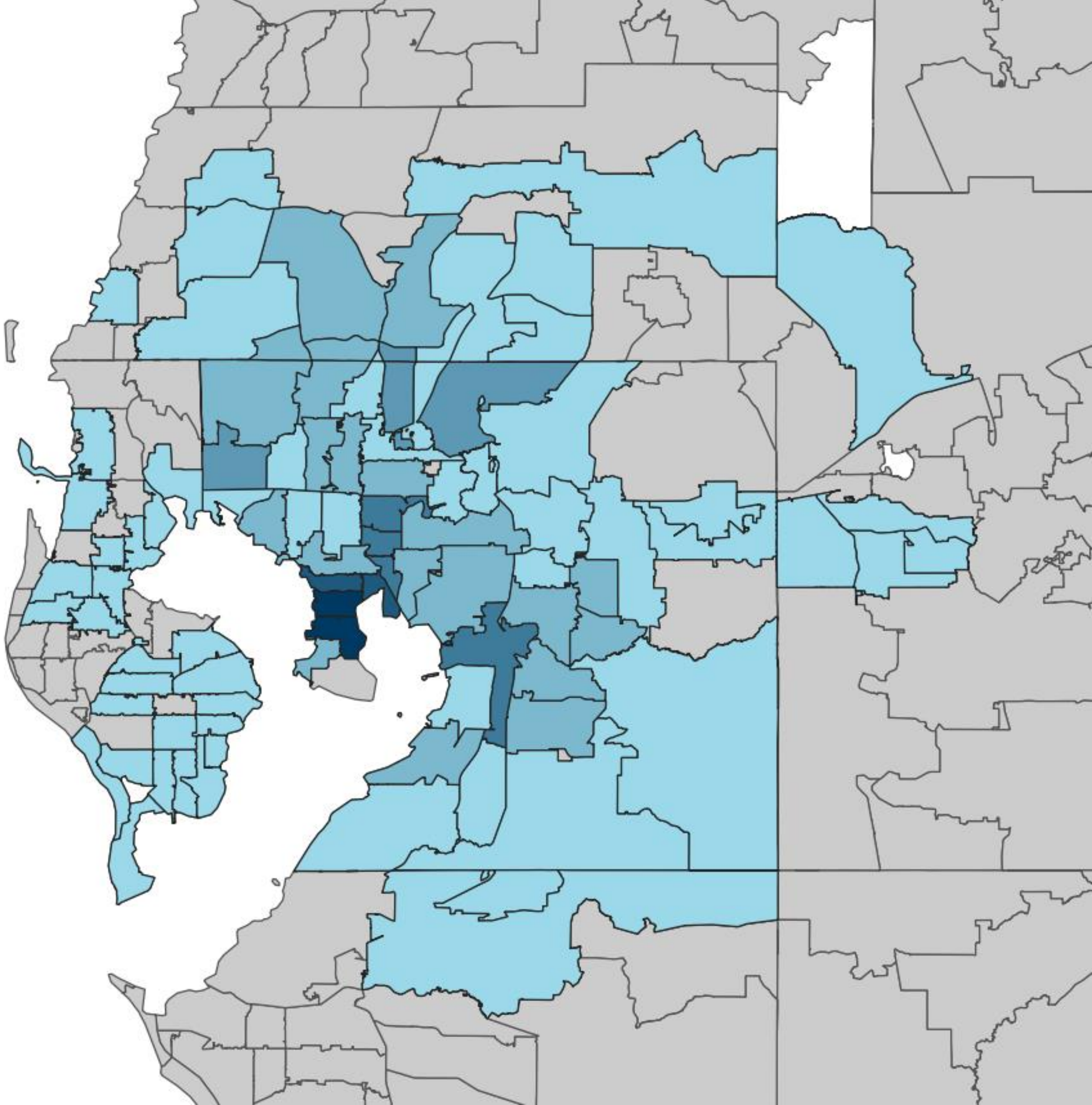
Large numbers of residents (59%) and workers (49%) expect to maintain some work from home capacity after reopening

Residence *Profiles*

Worker *Locations*

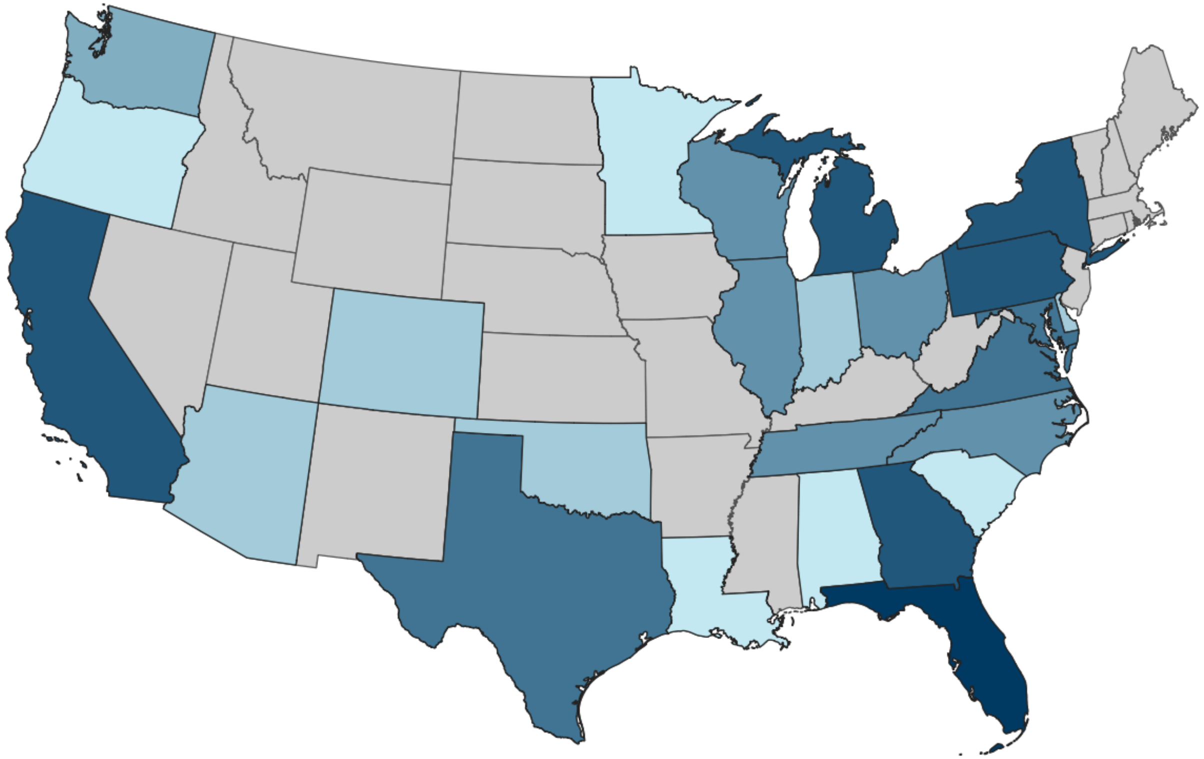
- Downtown’s workers live across the Tampa Bay Area

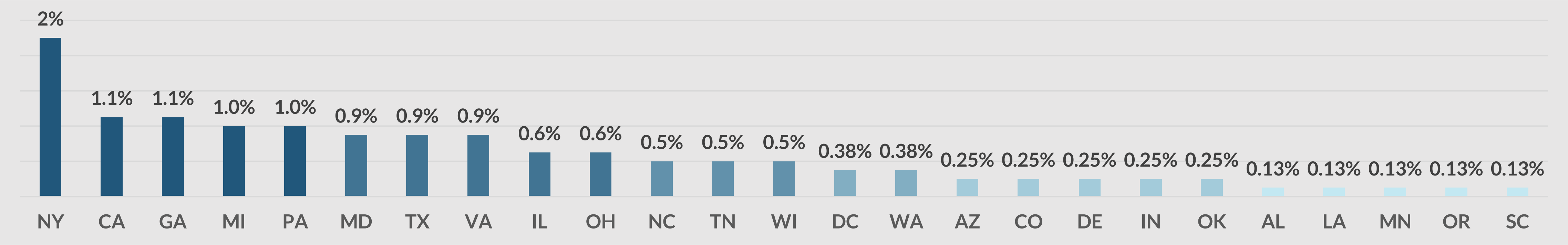
- The largest concentrations are nearest to Downtown, with other noteworthy concentrations found in Seminole Heights, Brandon, New Tampa, and Pasco County



Relocating *From Out-of-State*

15% of residents have come from elsewhere in the US, with the largest concentrations coming from the Northeast and Midwest



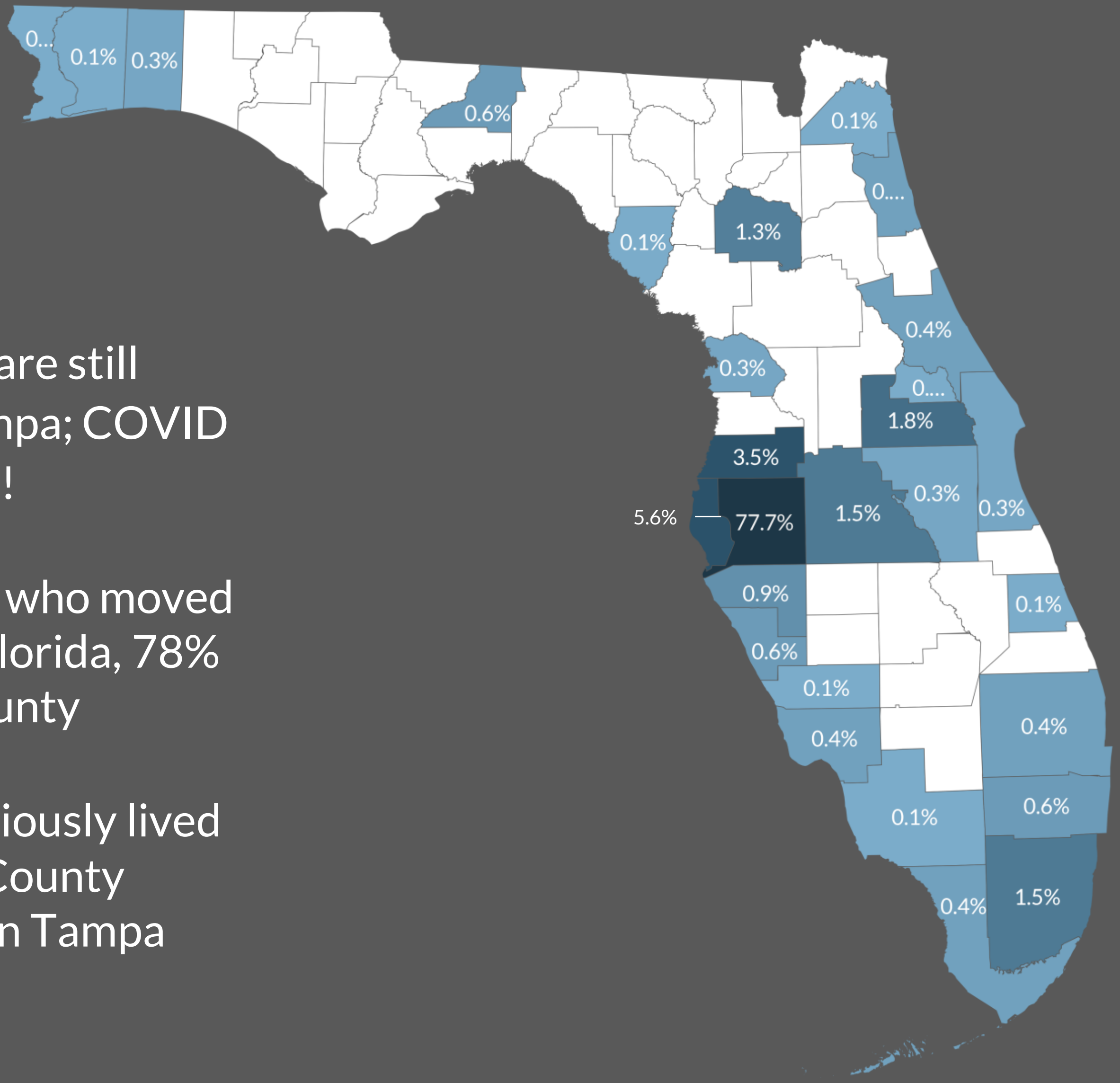


Relocating *within Florida*

Despite COVID-19, people are still moving into Downtown Tampa; COVID didn't stop the urban dream!

Out of the 85% of residents who moved from another residence in Florida, 78% were from Hillsborough County

63% of respondents previously lived elsewhere in Hillsborough County before moving to Downtown Tampa



Pow
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Housing *Costs*

64% of renters want to own

Resident: Owning

Currently, 53% of residents own. Of the 47% that rent, two-thirds would prefer to own

$1,850.76

Resident: Current

Resident current monthly rental rate

$2,263.02

Resident: Maximum

Resident maximum affordable monthly rental rate

75% of those wanting to relocate would own

Worker: Relocate

50% of workers still do not want to move downtown because they prefer a suburban lifestyle

$1,888.21

Worker: Maximum

Worker maximum affordable monthly rental rate

Affordable and attainable housing remain challenges for Downtown

Both residents and workers agreed that Downtown is not ideal for low-income and working-class people

Expectations *Met*

Riverwalk remains the top asset
Walkability was once a weakness of Downtown Tampa, but the Riverwalk and other enhancements have made it into one of its big selling points

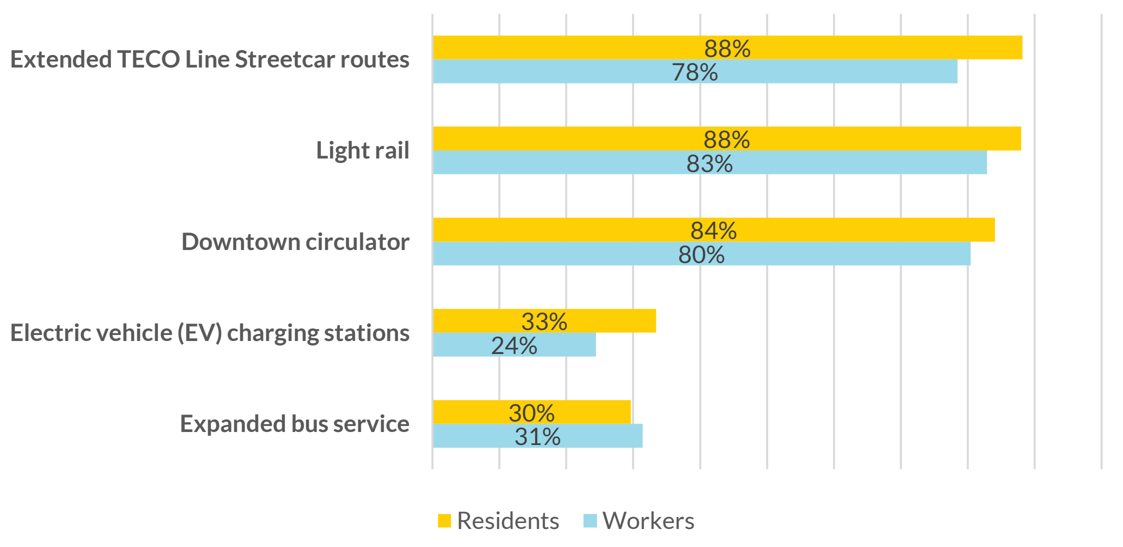
Downtown is pet friendly
Both groups recognize that Downtown Tampa caters to dog ownership and rate downtown's dog parks highly

Groceries are no longer the top priority
Grocery stores were previously very much in demand, but as new developments opened, the need has decreased

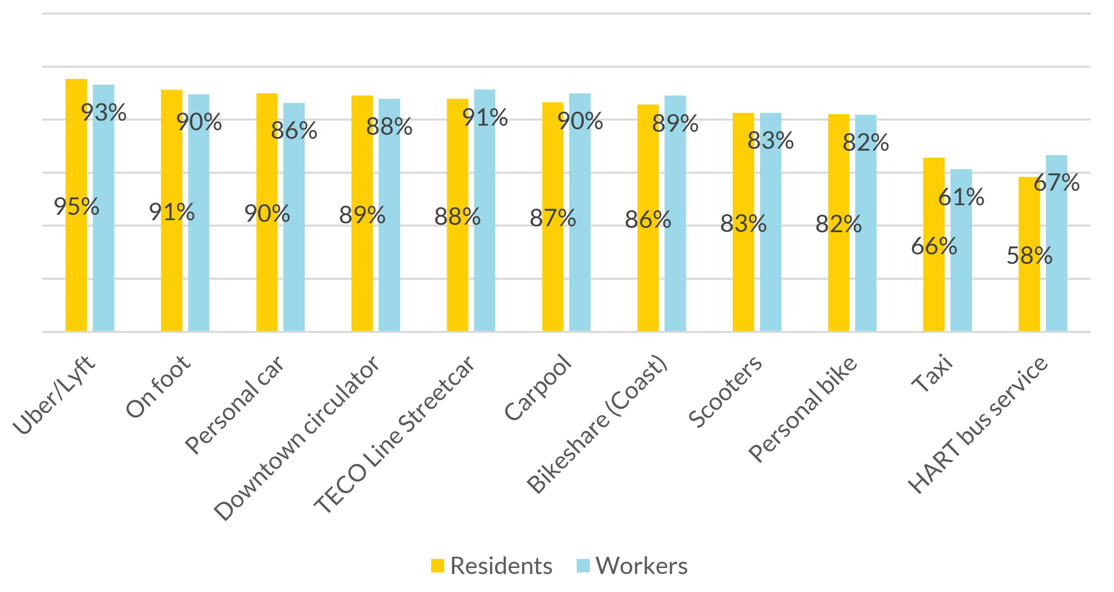
Getting Around *Downtown*

Transit *and Transportation*

Would you utilize if available or more prevalent in Downtown?



Level of satisfaction for transit options



Automobiles

96% of workers use their car as their primary means of commuting

Walking

15% of resident cite walkability as Downtown Tampa's greatest asset

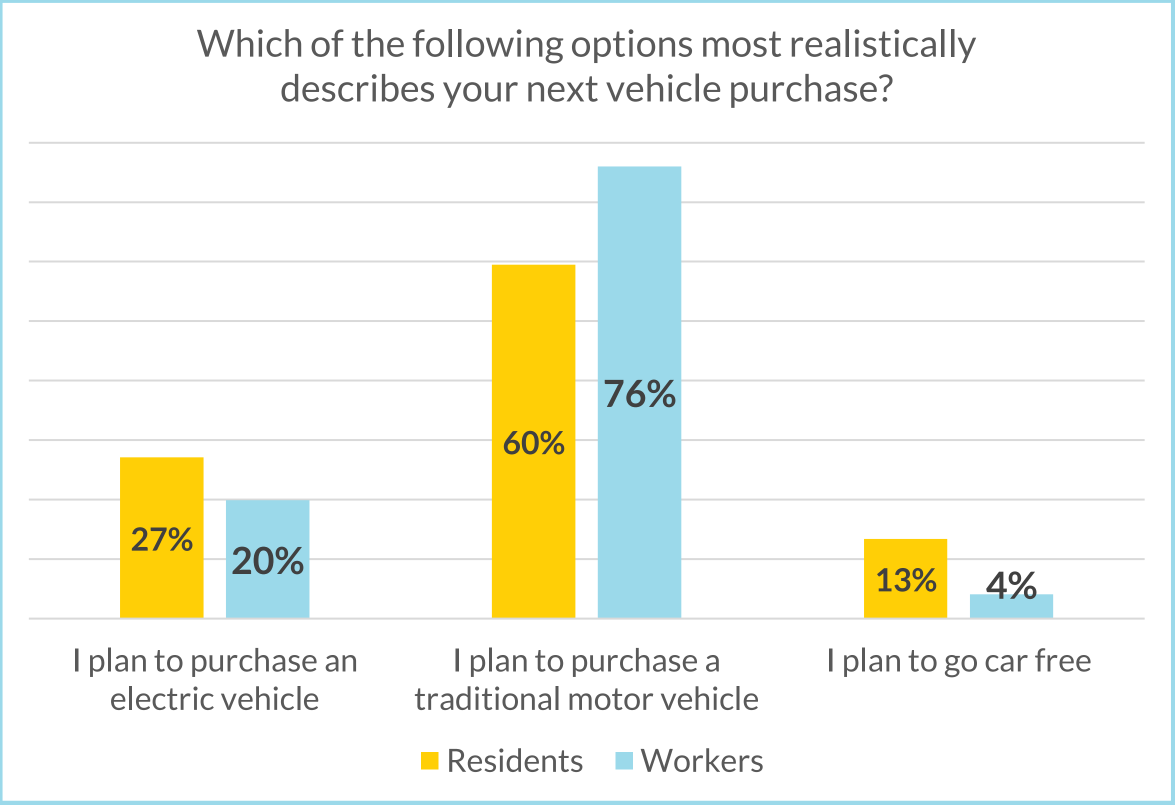
Streetcar

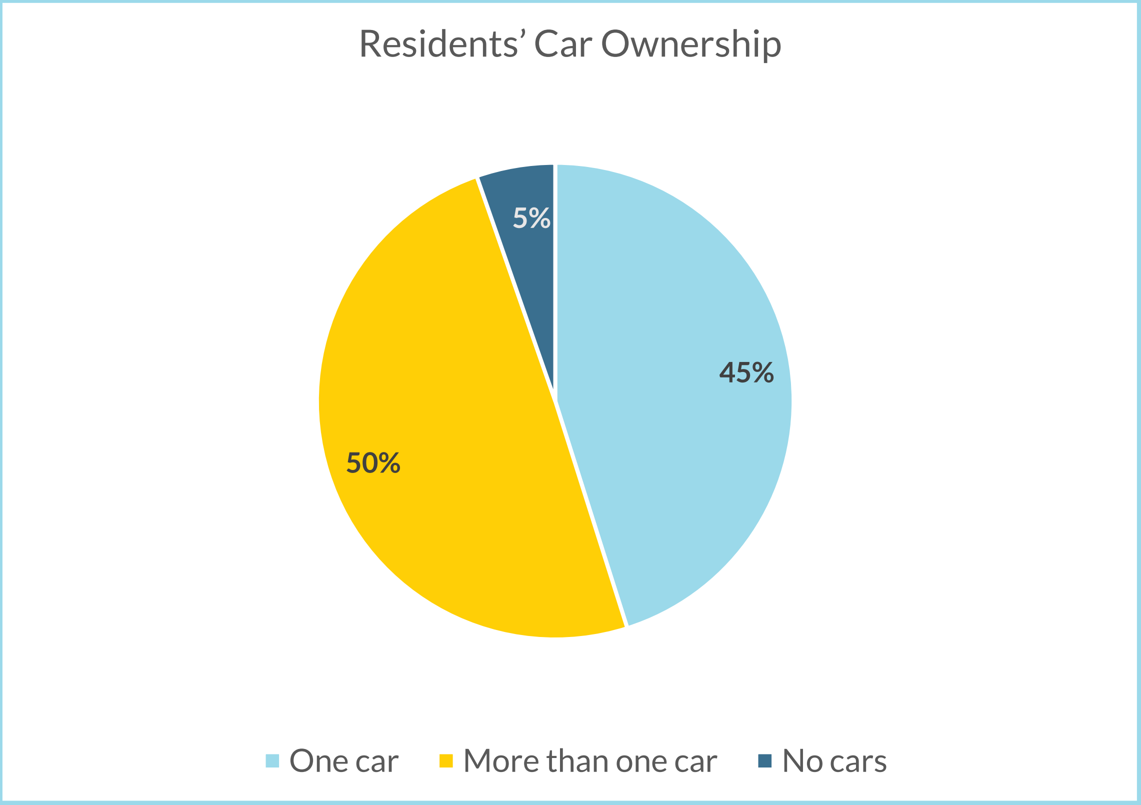
Of those that use the streetcar, 78% of residents and 75% of workers would still use the streetcar if it required a fare

Scooters

Both resident (44%) and worker (25%) populations use scooters as a means of transportation, leisure, and commuting

Electric Vehicles *and Car-free Living*

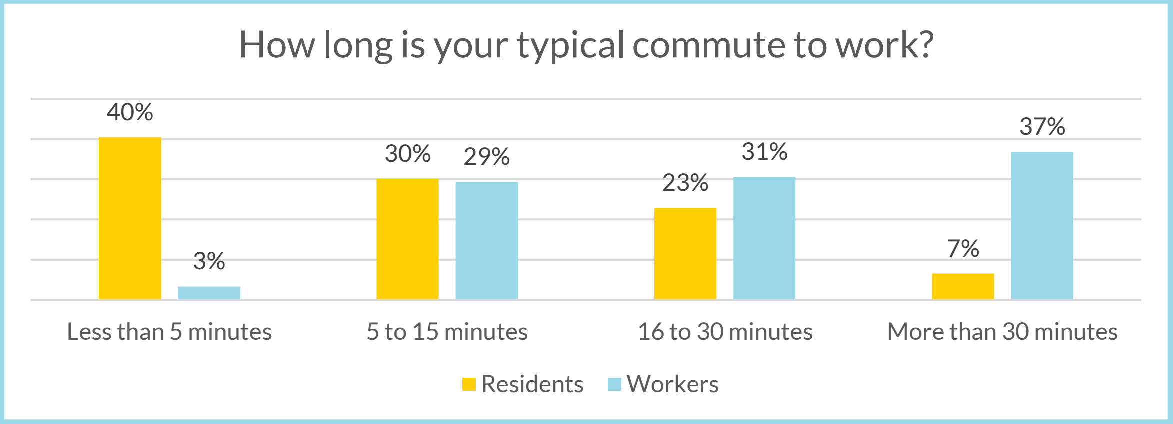




One in five workers and more than **one in four residents** plan on purchasing an electric vehicle as their next vehicle purchase

Downtown's residents are increasingly car-free; more than **one in ten** intend to go car-free rather than purchase a new vehicle

Parking *and Commutes*



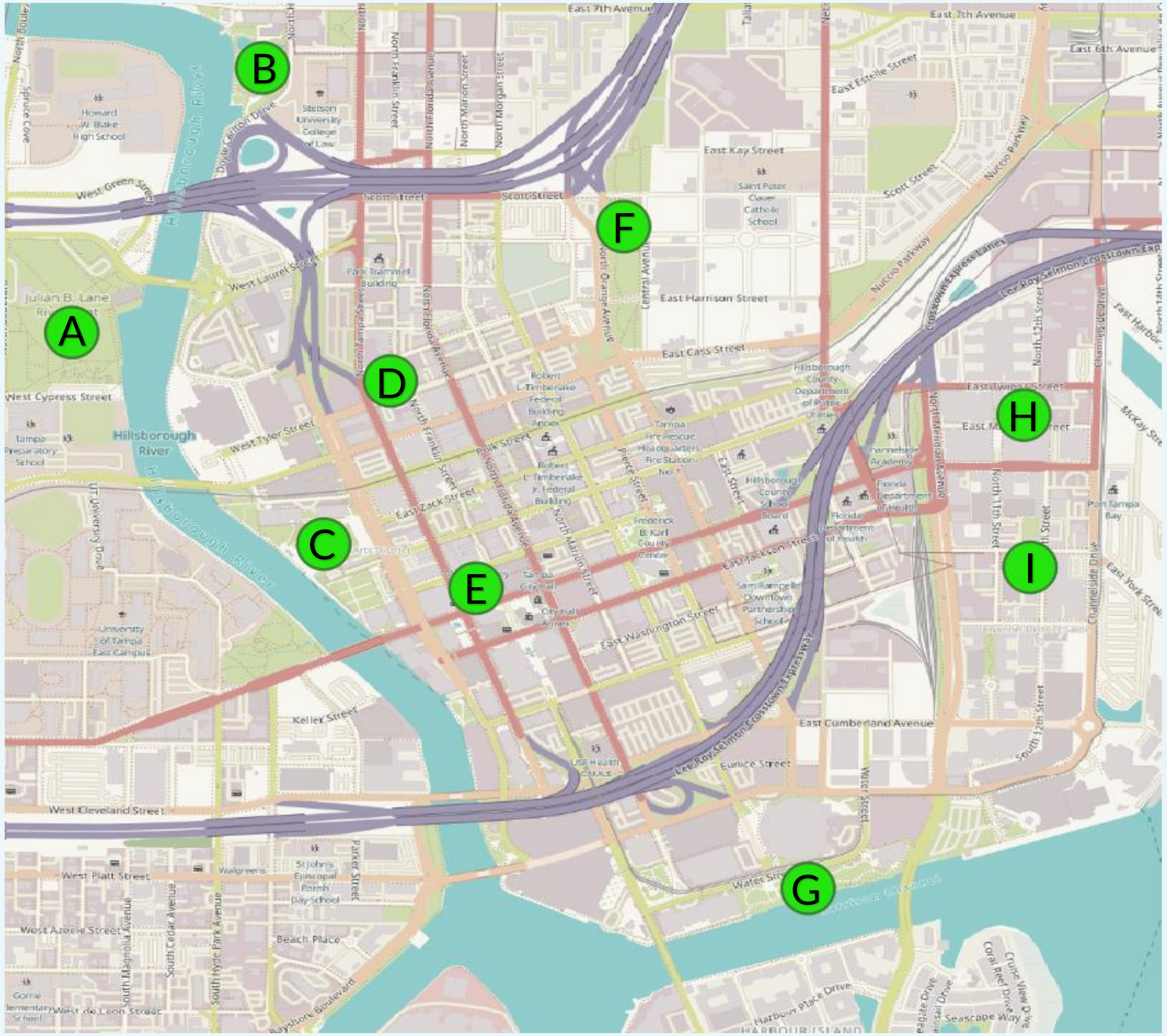
Parking is the largest pain point for workers and is cited in open-ended feedback as the biggest opportunity for improvement **(26%)**

Residents and workers maintain that parking is **expensive and hard to find**; residents want **more EV charging** in parking lots and garages

Commute times are low for residents but remain high for workers; **37%** have a commute greater than 30 minutes

Lifestyle *and Activation*

Parks *in Downtown*



- **Downtown's parks** are popular
- **Larger parks** rated higher than smaller parks
- Opportunities remain as residents and workers look for **more activation and vending at parks**

How satisfied are you with the parks you visit? Rate where 1 is very unsatisfied and 5 is very satisfied.

Key	Park	Resident	Worker	Callout
A	Julian B. Lane Riverfront	4.36	4.33	Desire for vending
B	Water Works	4.32	4.28	Family park
C	Curtis Hixon Waterfront	4.22	4.25	Love events
D	Herman Massey	3.39	3.45	Heavy potential
E	Lykes Gaslight Square	3.52	3.58	Need benches
F	Perry Harvey	3.73	3.77	Underutilized
G	Cotanchobee Fort Brooke	4.01	3.94	Walk through
H	Madison Street	3.83	3.69	Pet friendly
I	Washington Street	3.70	3.68	Pet friendly

Homeless *Liaison*

The Downtown Partnership has hired a Homeless Liaison to work closely with the Tampa Police Department's Homeless Liaison

They will monitor and address issues of homelessness in the district and refer those in need to appropriate services. The goal is help provide a safe and inviting downtown environment for all residents

It is important for the partnership to address homelessness:

Homelessness has increased in importance for both stakeholder groups

In open-ended feedback, residents reference homelessness as the second largest category (19%) and 14% of workers cite it as well

Big Box Store *Requests*

Both audiences have a clear preference for a new retail option

Extended hours of operation
Later hours for both food and retail would keep workers in the district longer and later as well as offer more options to residents

target
Resident: 40%
Worker: 35%

No big box store
Resident: 33%
Worker: 37%

Whole Foods Market
Resident: 5%
Worker: 4%

Publix
Resident: 4%
Worker: 5%

Trader Joe's
Resident: 5%
Worker: 4%

Costco Wholesale
Resident: 5%
Worker: 2%

Walmart
Resident: 3%
Worker: 5%

Looking *Ahead*

Future *Opportunities*

Intracity Mobility

Remains something wanted by both stakeholder groups, from commuting to last-mile transit

With more residents considering going car-free, this is growing in importance

Homeownership and Affordability

Are scarce in downtown.

Many workers would love to move here but want to own rather than rent

Residents and workers feel that downtown does not cater to the working class

Consumer Goods Options

Are in demand for residents and workers

Although demand for groceries has largely been met, they want more vending and activation in parks, longer hours of operation for businesses, and new retail options

Enduring *Strengths*

Thriving Urban Lifestyle

Continues to attract residents from across the county, state, and nation

Downtown's variety, diversity, and satisfaction have improved, even during the pandemic

Walkability

Has changed from a weakness to a strength over the last decade. Residents and workers have taken advantage of walking in Downtown and rate its parks highly

With more than one in ten residents saying that they intend to go car-free, Downtown's walkability will remain in the spotlight

Recommendations

Remain at extremely high levels

96% of residents are likely to recommend Downtown Tampa to their peers as a place to live

90% of workers recommend Downtown Tampa as a place to work

Thank You!

If you have any questions regarding the study, feel free to contact us at **813-318-0565** or submit your question through our contact form at **www.hcpassociates.com/contact.**

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