



2025 Westshore District Resident & Worker Survey

Executive Meeting Presentation

Presented by: HCP Associates
On Behalf of the Westshore Alliance

About the Study

2025 Data Collection

September 24 – December 30, 2025

474

**Workers
Surveyed**

379

**Residents
Surveyed**

- Email blasts to district employers and residents
- Paid Meta advertising (254,483 impressions; 89,886 reach; 2,618 landing page views)
- In-person activations, phone calls, handout cards with QR codes
- Consistent methodology maintained from the 2017 baseline study

2025 Survey Demographics

Gender



60% of workers and 59% of residents identify as female

Income



55% of workers and 49% of residents report an income level of \$50,000 to \$149,000

Age



64% of workers and 72% of residents are aged 25 to 54 years

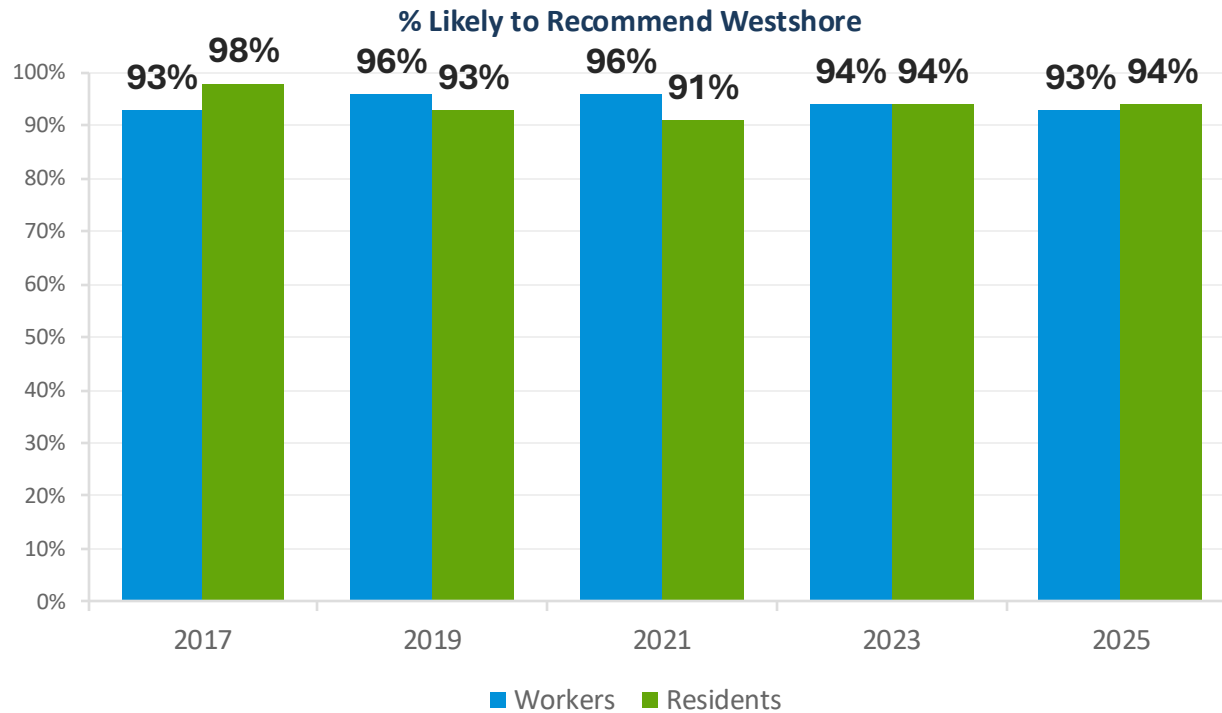
Race/Ethnicity



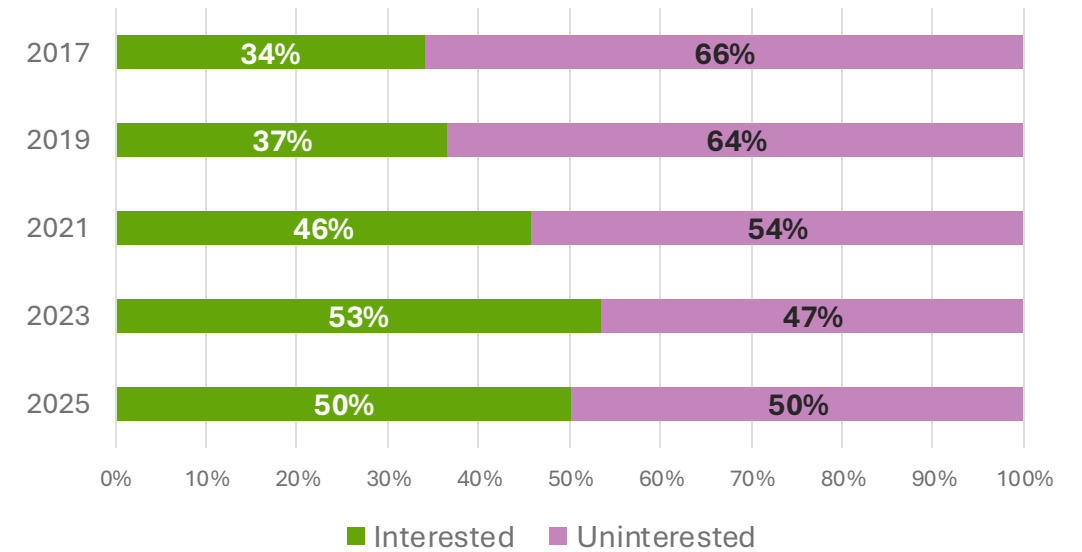
73% of workers and 67% of residents identified as white

	2017	2019	2021	2023	2025
Workers	769	468	422	444	474
Residents	388	327	327	201	379

Recommending Westshore



Workers Trend: Please note how interested you are in living in the Westshore District within the next five years.



of workers would
be likely to
recommend
Westshore as a
place to work

93%

of residents
would be likely to
recommend
Westshore as a
place to live

94%

of workers expressed
interest in moving to the
Westshore District within
the next 5 years

50%

Up from 34% in 2017 — a
significant and sustained
increase since the
baseline study.

Central Location Drives Westshore's Appeal

Westshore's location in the region continues to be the District's most noted strength

58%

of workers cited
Westshore's location and
access to other areas as the
District's greatest strength

63%

of residents cited
Westshore's location and
access to other areas as the
District's greatest strength

52%

of residents cited "Central
Location" as a motivating
factor to live in Westshore

38%

of workers cited "Central
Location" as a motivating
factor to work in Westshore

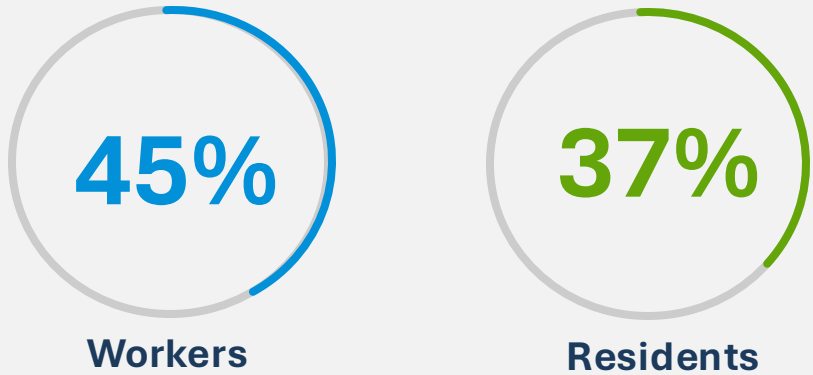


Location has been the #1 cited strength for both residents and workers across all iterations of the study.



Traffic Remains the District's Biggest Challenge

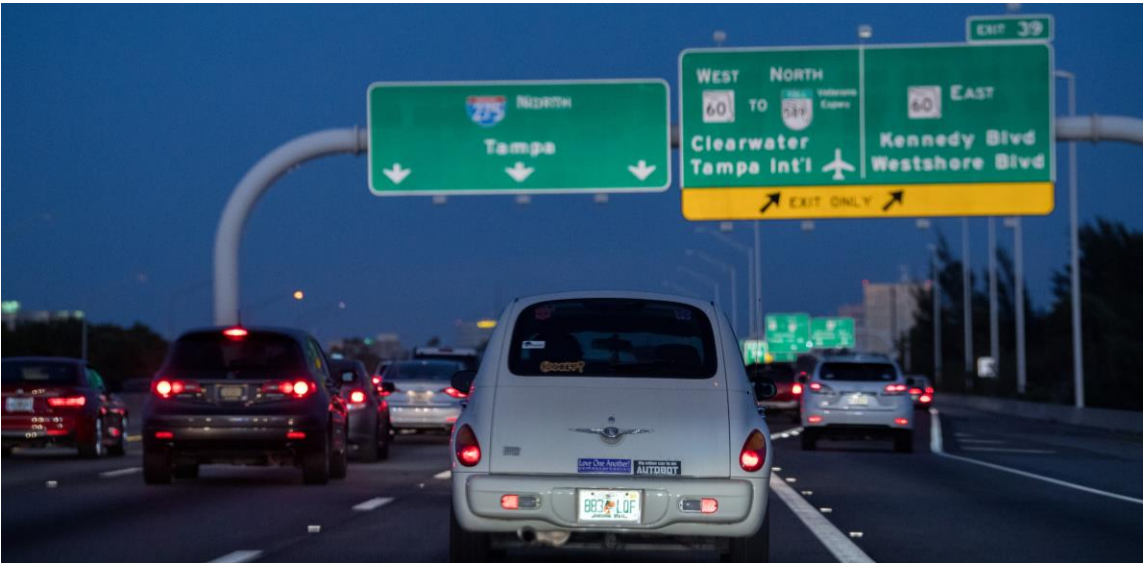
Residents and workers reported that traffic/infrastructure was the most important area for improvement in Westshore



- Traffic concerns are the top two expectation gaps for workers and residents
- Expectation gaps for traffic flow in/out of the District and traffic circulation within the District grew significantly from 2023 to 2025

Workers: Top 5 Expectation Gaps	2023	2025
Traffic flow in/out of the District	2.82	3.72
Traffic circulation within the District	2.75	3.53
Walkability	1.77	2.50
Greenspaces	1.42	2.30
Personal safety	1.53	1.78

Residents: Top 5 Expectation Gaps	2023	2025
Traffic circulation within the District	1.94	2.64
Traffic flow in/out of the District	2.10	2.62
Greenspaces	1.87	2.48
Pedestrian/bicycle trails	1.89	2.29
Walkability	1.43	2.03



Workers | Expectation Gaps Trending

For Westshore workers, the top five expectation gaps have remained relatively consistent since 2017

Expectation Gaps: Rankings Changes (Top 5)					
	2017	2019	2021	2023	2025
1	Traffic flow in and out of the District (4.17)	Traffic Flow in and out of the District (4.41)	Traffic Flow in and out of the District (2.69)	Traffic Flow in and out of the District (2.82)	Traffic Flow in and out of the District (3.72)
2	Traffic circulation within the District (3.93)	Traffic Circulation within the District (4.19)	Traffic Circulation within the District (2.69)	Traffic Circulation within the District (2.75)	Traffic Circulation within the District (3.53)
3	Walkability (2.02)	Walkability (2.92)	Strong Sense of personal safety (1.37)	Walkability (1.77)	Walkability (2.50)
4	Greenspaces (1.84)	Greenspaces (2.50)	Greenspaces (1.08)	Strong sense of personal safety (1.53)	Greenspaces (2.30)
5	Strong sense of personal safety (1.70)	Strong sense of personal safety (1.79)	Walkability (1.01)	Greenspaces (1.42)	Strong sense of personal safety (1.78)

Residents | Expectation Gaps Trending

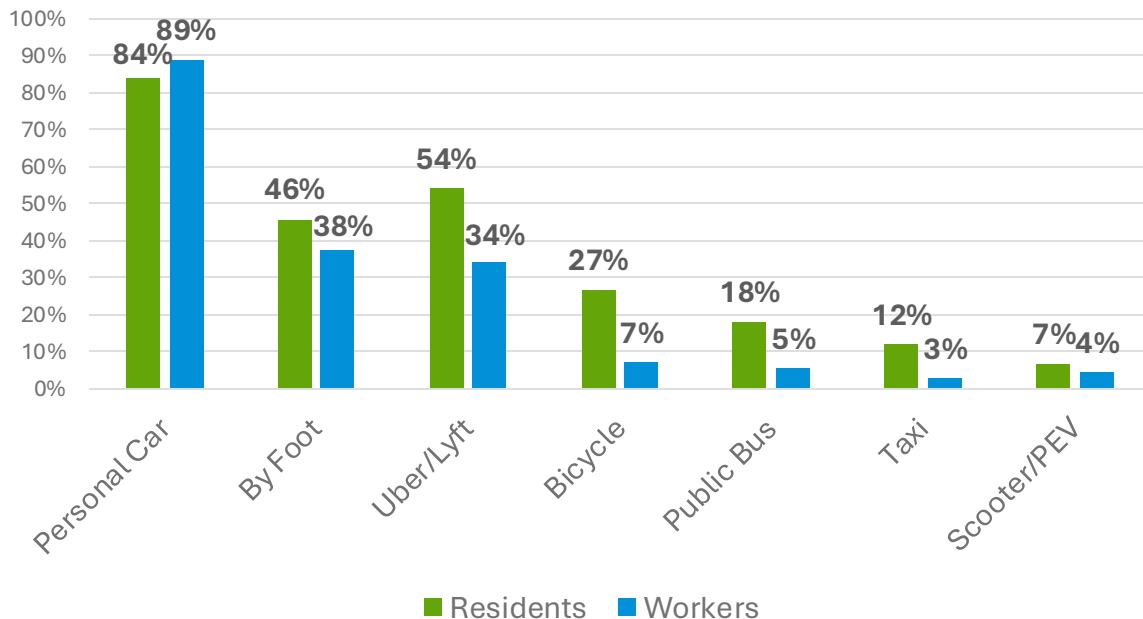
For Westshore residents, connectivity concerns, such as traffic, walkability, and pedestrian/bicycle trails, has been consistent areas of concern

Expectation Gaps (Top 5)					
	2017	2019	2021	2023	2025
1	Traffic Flow in and out of the District (2.38)	Greenspaces (3.31)	Greenspaces (2.18)	Traffic Flow in and out of the District (2.10)	Traffic Circulation within the District (2.64)
2	Pedestrian/Bicycle Trails (2.37)	Traffic Flow in and out of the District (3.16)	Traffic Flow in and out of the District (2.14)	Affordable Housing Options (1.98)	Traffic Flow in and out of the District (2.62)
3	Traffic Circulation within the District (2.19)	Pedestrian/Bicycle Trails (3.15)	Traffic Circulation within the District (2.13)	Traffic Circulation within the District (1.94)	Greenspaces (2.48)
4	Greenspaces (2.15)	Traffic Circulation within the District (3.09)	Pedestrian/Bicycle Trails (1.99)	Pedestrian/Bicycle Trails (1.89)	Pedestrian/Bicycle Trails (2.29)
5	Walkability (1.97)	Walkability (2.73)	Affordable Housing Options (1.95)	Greenspaces (1.87)	Walkability (2.03)

Westshore | A Car-Centric District

A personal car is the most common mode of transportation to get around the Westshore District for both residents and workers.

Do you ever use any of the following modes of transportation to get around in the Westshore District?
Select all that apply.



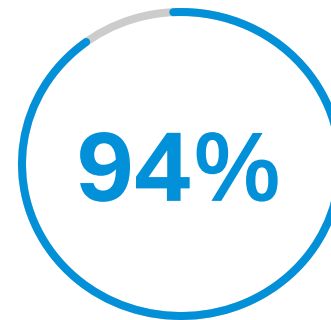
Workers

89%

Residents

84%

Personal cars are used by 78% of workers and 83% of residents daily or several times a day.



of workers drive alone to work

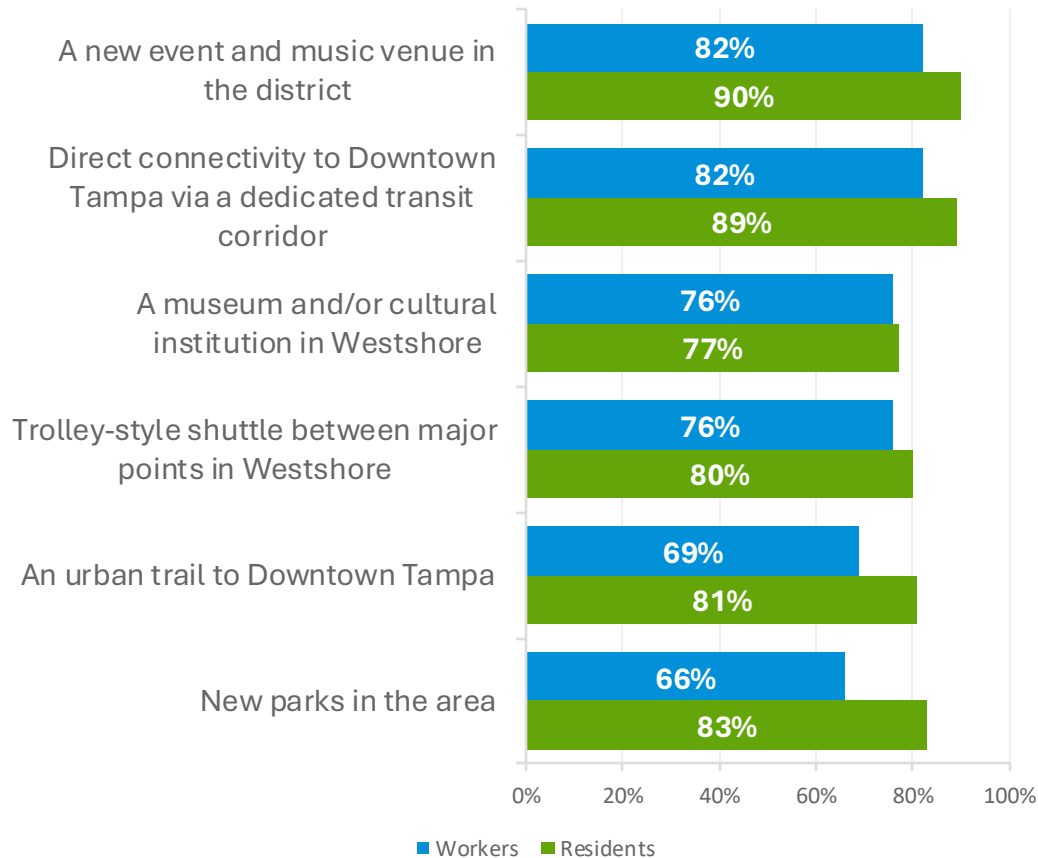
What would get workers to leave for lunch more?

42%

said **improved connectivity** (walkability, less traffic, parking, transit) **would encourage them to leave the office for lunch more often**

Desire for New Amenities in Westshore

If available or more prevalent how likely would you be to participate in or utilize the following within the District?



For residents and workers, demand for most surveyed amenities saw increases across nearly all categories between 2023 and 2025.



89%

of residents would be likely to use a dedicated transit corridor between Downtown Tampa and Westshore

82%

of workers would be likely to use a dedicated transit corridor between Downtown Tampa and Westshore

Trend | Desire for New Amenities in Westshore

Residents Top 3: If available or more prevalent, how likely would you be to participate in or utilize the following in the District?: Likely + Highly Likely

	2021	2023	2025
1	New Parks (85%)	New Event and Music Venue (83%)	New Event and Music Venue (90%)
2	Urban Trail to Downtown Tampa (83%)	Urban Trail to Downtown Tampa (81%)	Direct connectivity to Downtown Tampa via a dedicated transit corridor (89%)
3	New Event and Music Venue (79%)	New Parks (80%)	New Parks (83%)

Workers Top 3: If available or more prevalent, how likely would you be to participate in or utilize the following in the District?: Likely + Highly Likely

	2021	2023	2025
1	New Event and Music Venue (74%)	New Event and Music Venue (68%)	Direct connectivity to Downtown Tampa via a dedicated transit corridor (82%)
2	A museum and/or cultural institution (71%)	A museum and/or cultural institution (62%)	New Event and Music Venue (82%)
3	Trolley-style shuttles between major points in Westshore (70%)	Trolley-style shuttles between major points in Westshore (62%)	A museum and/or cultural institution (76%)

Engagement Inside and Outside of Westshore

47%

of workers leave their office at least once a week to run a personal errand in the District

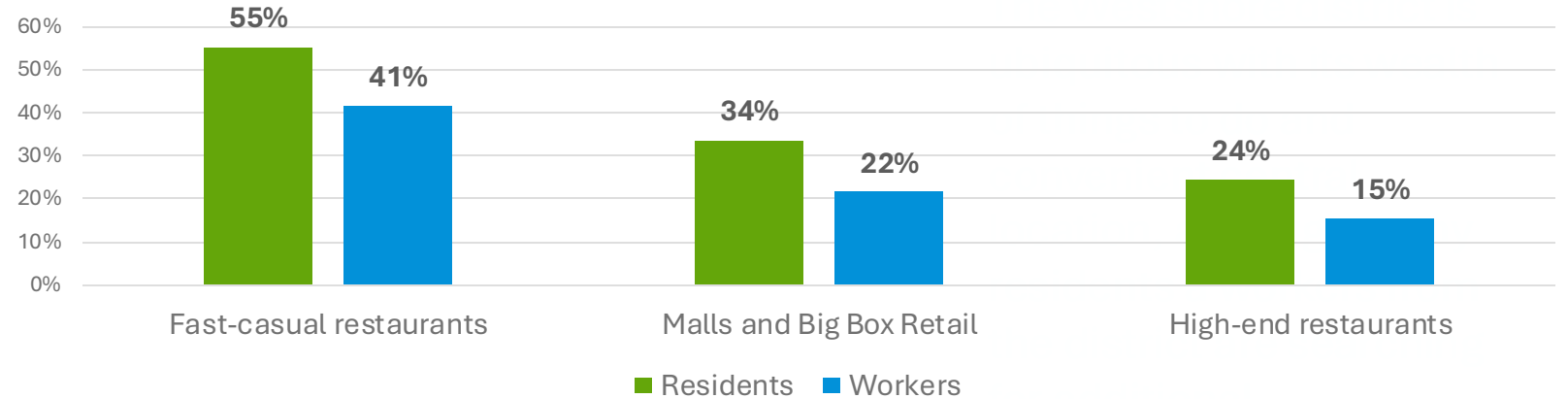
33%

of residents cite groceries or retail as the most common errand to leave the district

54%

of residents leave the District weekly or several times a week to run personal errands

How often do you visit or participate in the following within the District?:
Weekly+



The percentage of residents and workers visiting malls and big box retail, fast-casual restaurants, and high-end restaurants weekly or more often has not significantly changed since 2017.

Key Takeaways

Central Location

- Westshore's position in the Tampa Bay region remains its defining strength.
- Location has been the #1 strength across all five iterations of this study.

Traffic & Connectivity

- Traffic flow and circulation remain the top concern of Westshore Residents and Workers across all iterations of the study.
- 89% of residents and 82% of workers would use a dedicated transit corridor to Downtown Tampa.

Amenity Demand

- Demand for new amenities saw a significant increase from 2023 to 2025.
- Strong interest in a new music venue, museum/cultural institution, trolley shuttles, and urban trail to downtown.

Thank You

This report was created by HCP Associates on behalf of the Westshore Alliance.

For questions regarding this study, please contact:

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