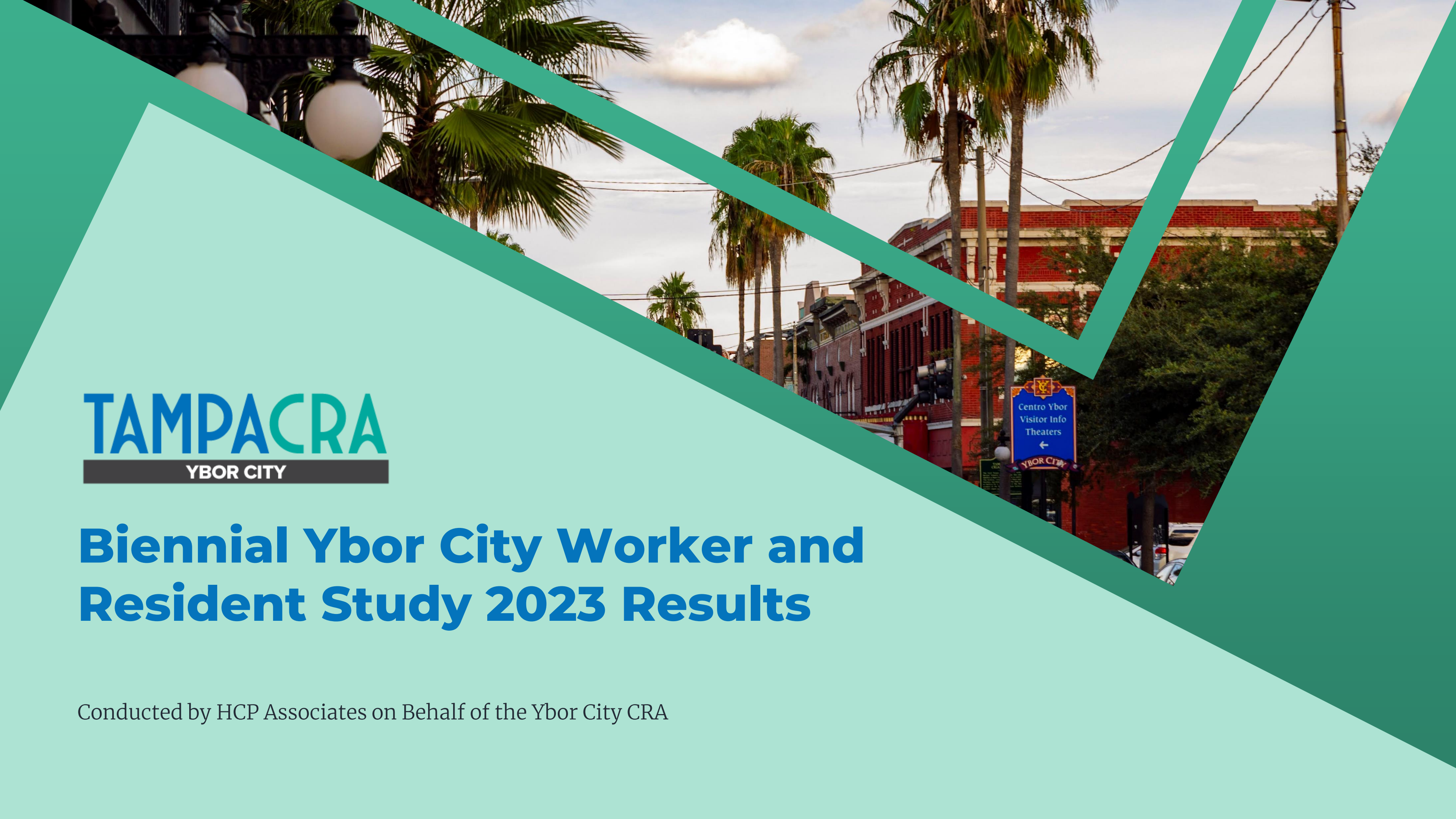


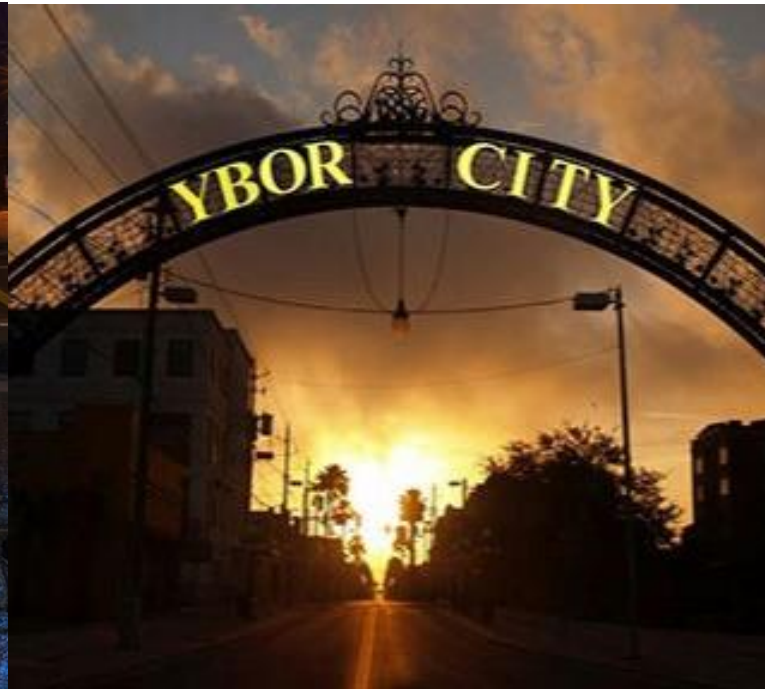
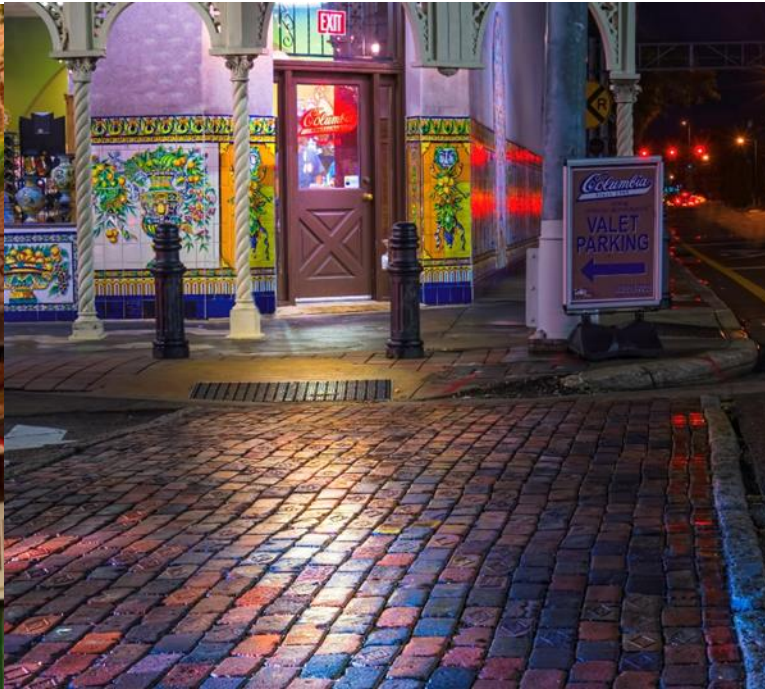


# Biennial Ybor City Worker and Resident Study 2023 Results

Conducted by HCP Associates on Behalf of the Ybor City CRA



# Study Background and Methodology



## Study Established in 2016

Established as a baseline study; occurs biennially and is on the 4<sup>th</sup> iteration

## Two online surveys

2023 Resident count: 285

MoE: +/- 5.63%

2023 Worker count: 270

MoE: +/- 5.80%

## Four Study Themes

1. Community Activation
2. Retail Development
3. Parking and Transportation
4. Safety and Security



# Expectation Gaps

# Expectation Gaps

The aggregate difference between how “important” a characteristic is and the “experience” with that characteristic is defined as the expectation gap.

- The higher the expectation gap, the more that residents and workers feel that the item/characteristic needs improvement.

In general, the following guidelines should be used when interpreting expectation gaps:

0.5 or lower	Above-average
Between 0.5 and 1.0	Good/On-Target
Greater than 1.0	Deficient
Higher than 2.0	Concerning

# 2023 Expectation Gaps: Residents

Public area cleanliness	2.02
Strong sense of personal safety	1.97
Affordable housing options	1.63
Quality housing options	1.60
Diversity in shopping/retail options	1.49
Diversity in food/beverage options	1.42
Affordable parking	1.30
Incoming/outgoing traffic flow	1.28
Car-free transportation options	1.11
Sense of community	1.05
In-town traffic circulation	1.03
Walkability	0.99
Things to do	0.94
Good parking accessibility	0.82
Art-filled streetscapes	0.26
Festivals and events	0.14

\* Blue = Safety and Security   Green = Parking and Transportation   Grey = Community Activation

Overall, residents' expectations gaps are generally smaller (better) than workers

We see generally positive perceptions from residents for most characteristics related to **community activation**

- These include “festivals and events,” “art-filled streetscapes,” and “sense of community.”

Residents are generally satisfied with characteristics related to **parking and transportation** in Ybor City.

- Residents are happiest with “walkability” followed closely by “in-town traffic circulation.”
- Expectation gaps for residents range from 0.90 to 1.30 for these characteristics

Residents report the largest expectation gaps focused on **safety and security** in the district

- These expectation gaps have also stayed relatively constant between studies

# 2023 Expectation Gaps: Workers

Strong sense of personal safety	3.39
Public area cleanliness	3.36
Affordable parking	3.21
Good parking accessibility	2.72
Diversity in food/beverage options	1.89
Incoming/outgoing traffic flow	1.68
In-town traffic circulation	1.57
Things to do	1.53
Diversity in shopping/retail options	1.52
Walkability	1.46
Sense of community	1.34
Car-free transportation options	1.16
Art-filled streetscapes	1.10
Festivals and events	0.60

Workers have somewhat positive perceptions about most characteristics related to “**community activation**”

- However, they view “diversity in food/beverage options” as a clear deficiency in the district

Workers express varying levels of dissatisfaction with characteristics related to **parking and transportation** in Ybor City.

- Workers are happiest with “**car-free transportation options**” followed by “**walkability.**”
- Workers are very dissatisfied with **parking**, both affordability and accessibility

Workers, like residents, report the largest expectation gaps focused on **safety and security** in the district

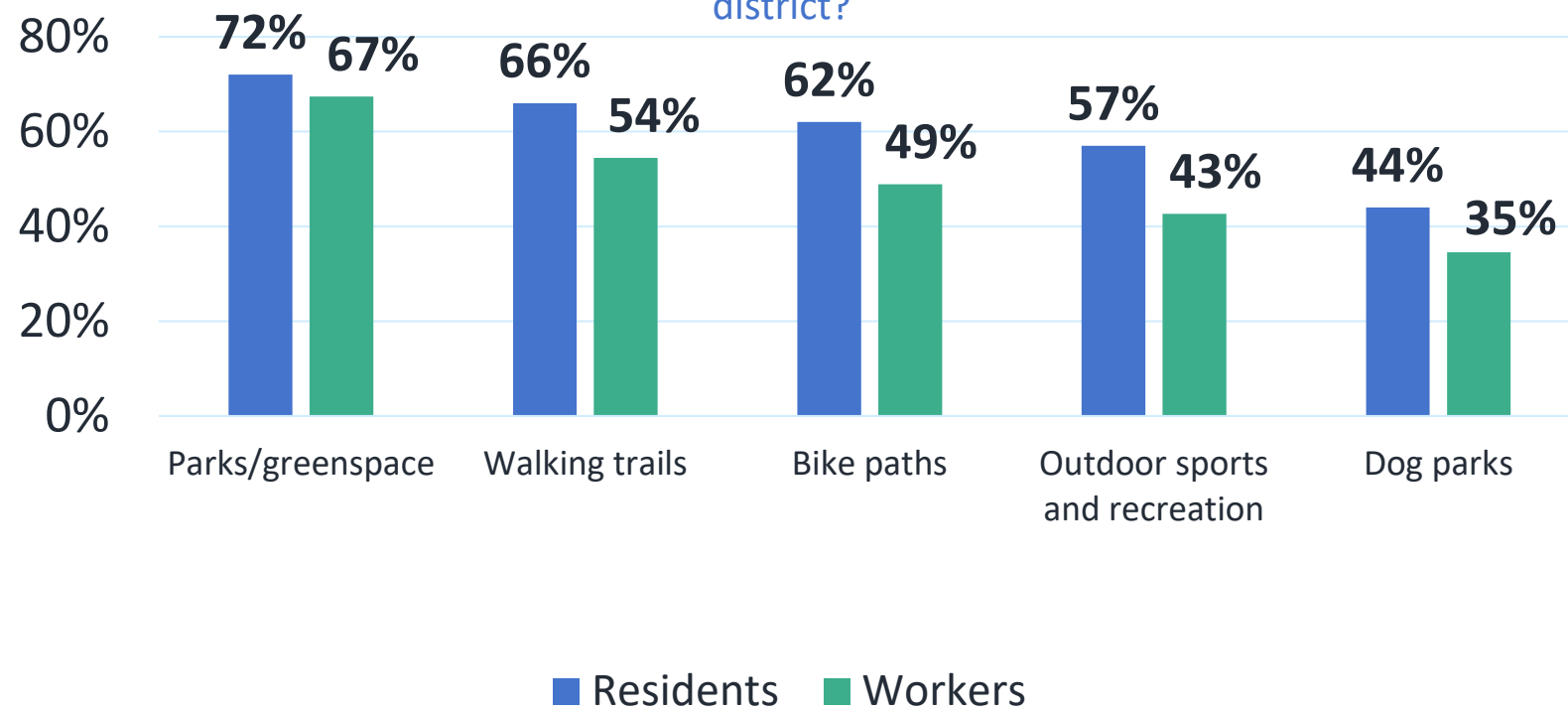
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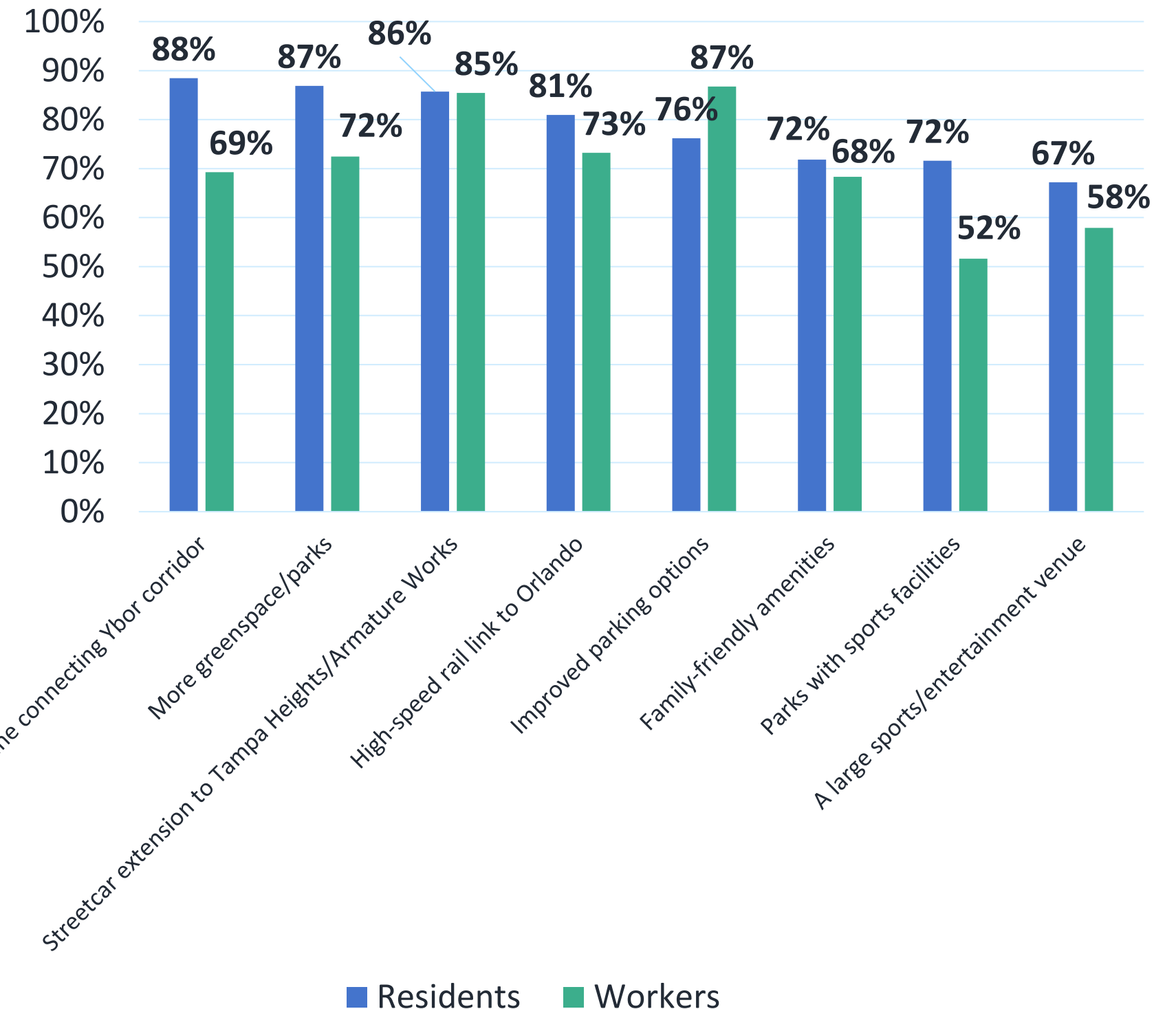
# Community Activation

# Community Priorities

What level of priority should Ybor City place on the following within the district?



If available or more prevalent, how likely would you be to participate in or utilize the following in Ybor City?



In general, **residents** place **more priority** on new community features and use them more often than **workers**

Residents place the greatest levels of priority on **“parks/greenspace”** and **“walking trails”**

Nearly identical percentages of residents (86%) and workers (85%) would utilize a **streetcar extension to Tampa Heights**

- Residents also report they would utilize a “greenway spine connecting [the] Ybor corridor” and “more greenspaces/parks” if they were available or more prevalent in the district

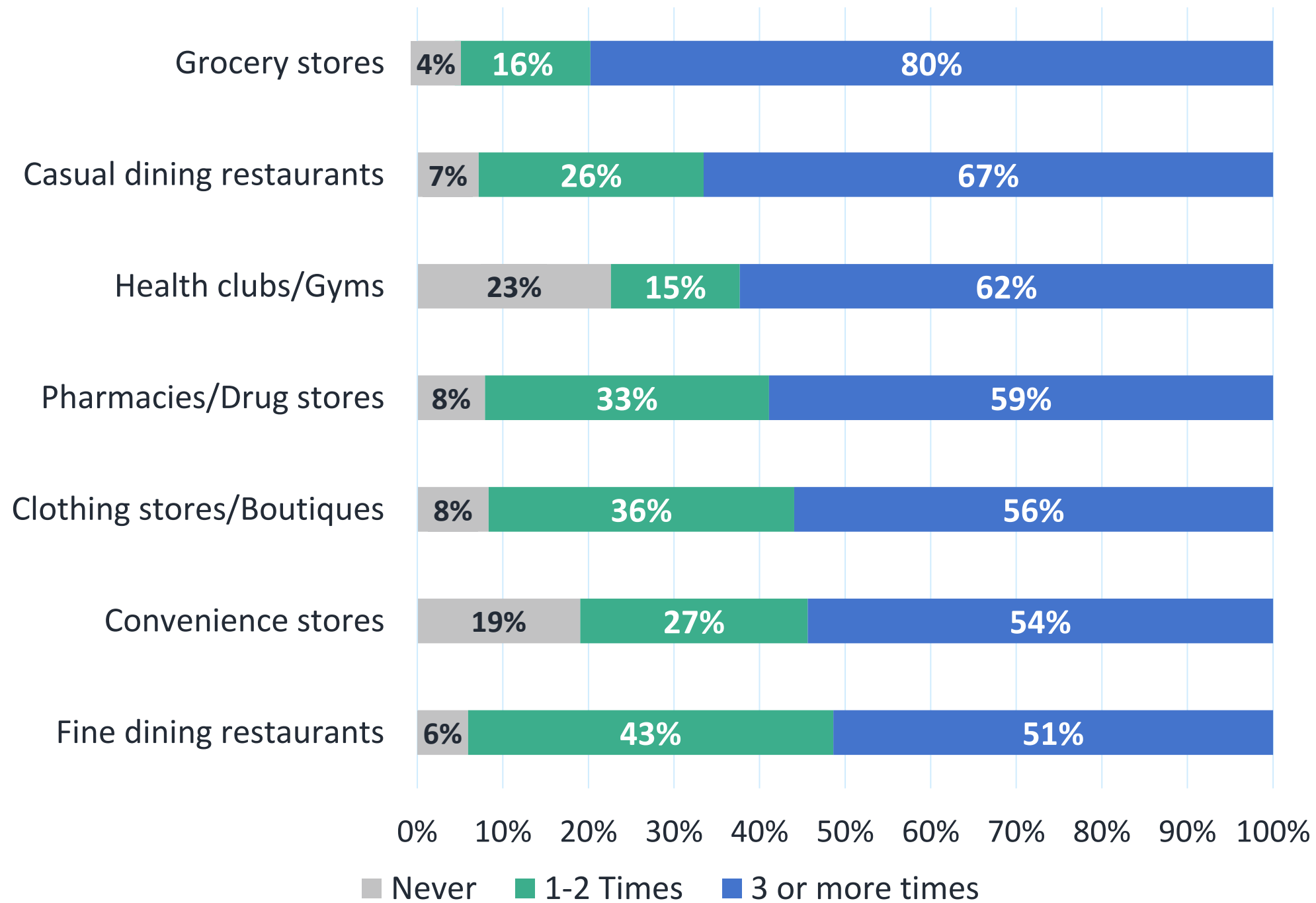




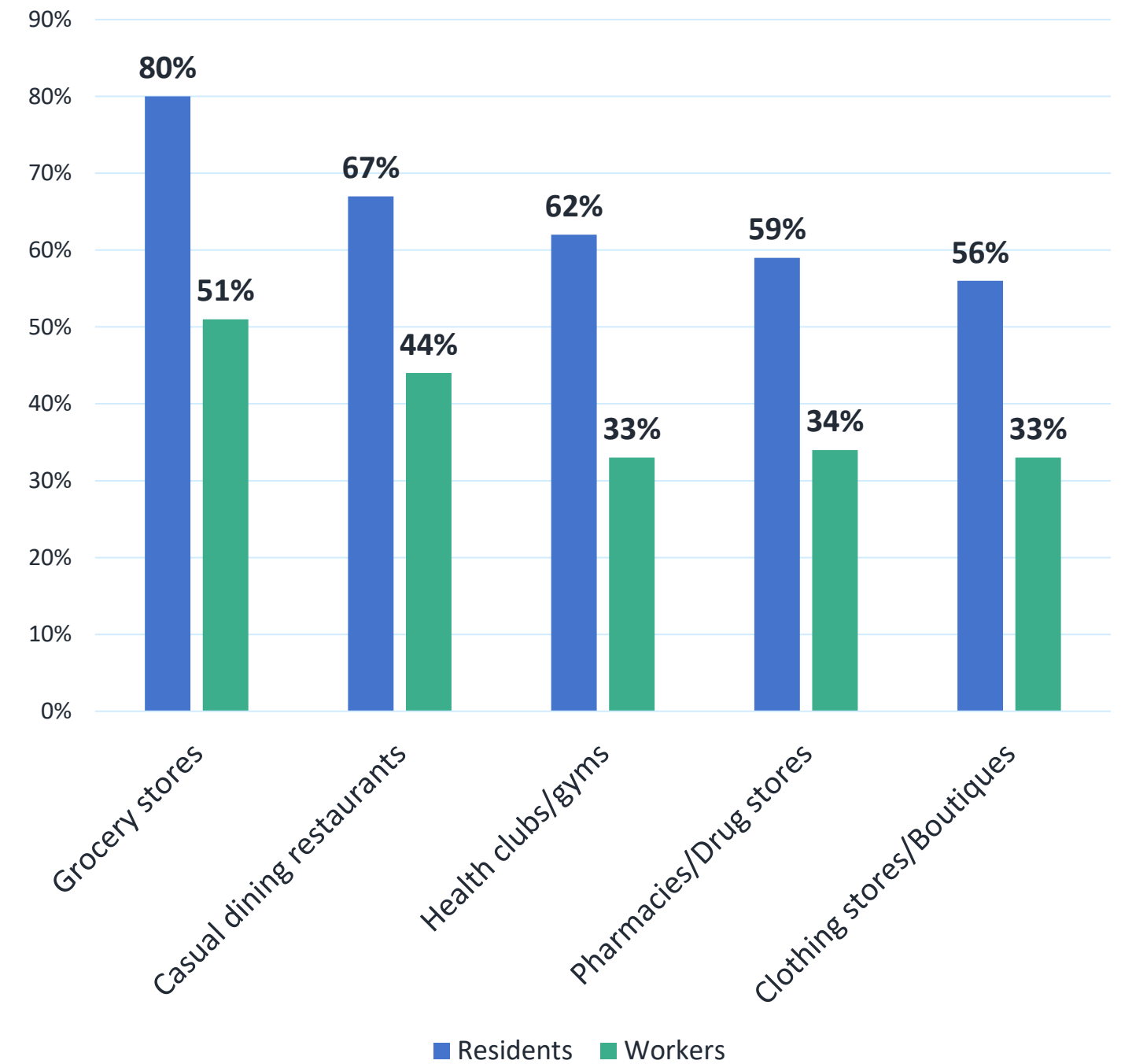
# Retail Development

# Leaving the District

**Residents Top 6:** In a typical month, how often are you leaving Ybor City for any of the following?



**Top 5:** In a typical month, how often are you leaving Ybor City for any of the following?: Leave three times or more a month



# New Desired Businesses *in Ybor City*

In general, residents and workers do not specifically name businesses, but are more general in the types of businesses

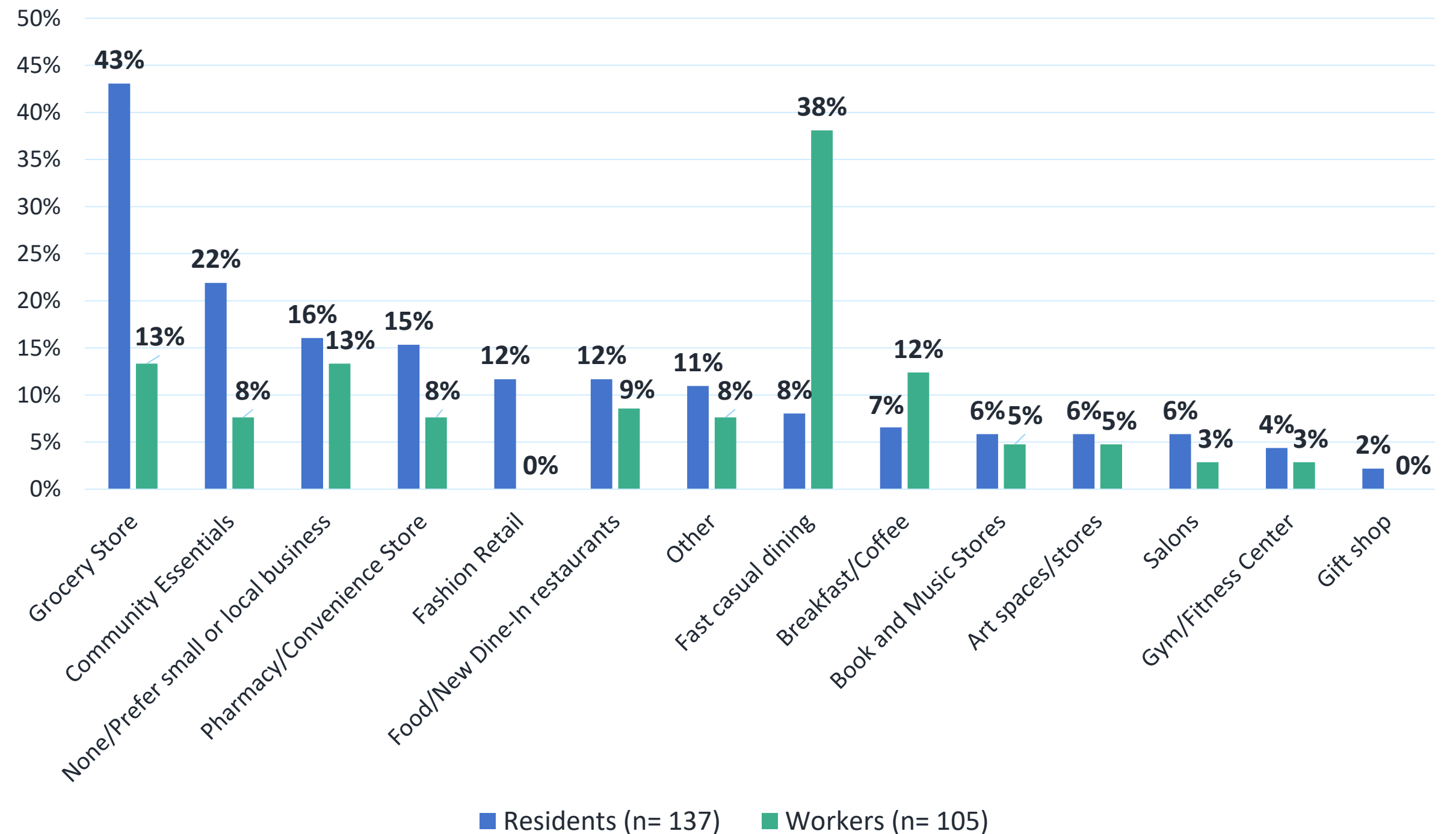
Residents, unsurprisingly, have more diverse opinions on what businesses would do well in Ybor City

- However, **residents** are clear that they want a **grocery store (43%)**.

**Workers** most desire **fast casual dining options (38%)**.

- Some specific restaurants named include Fresh Kitchen, Cava, Bolay.

Are there any specific retailers that have locations in the area, but would do well opening an Ybor location?

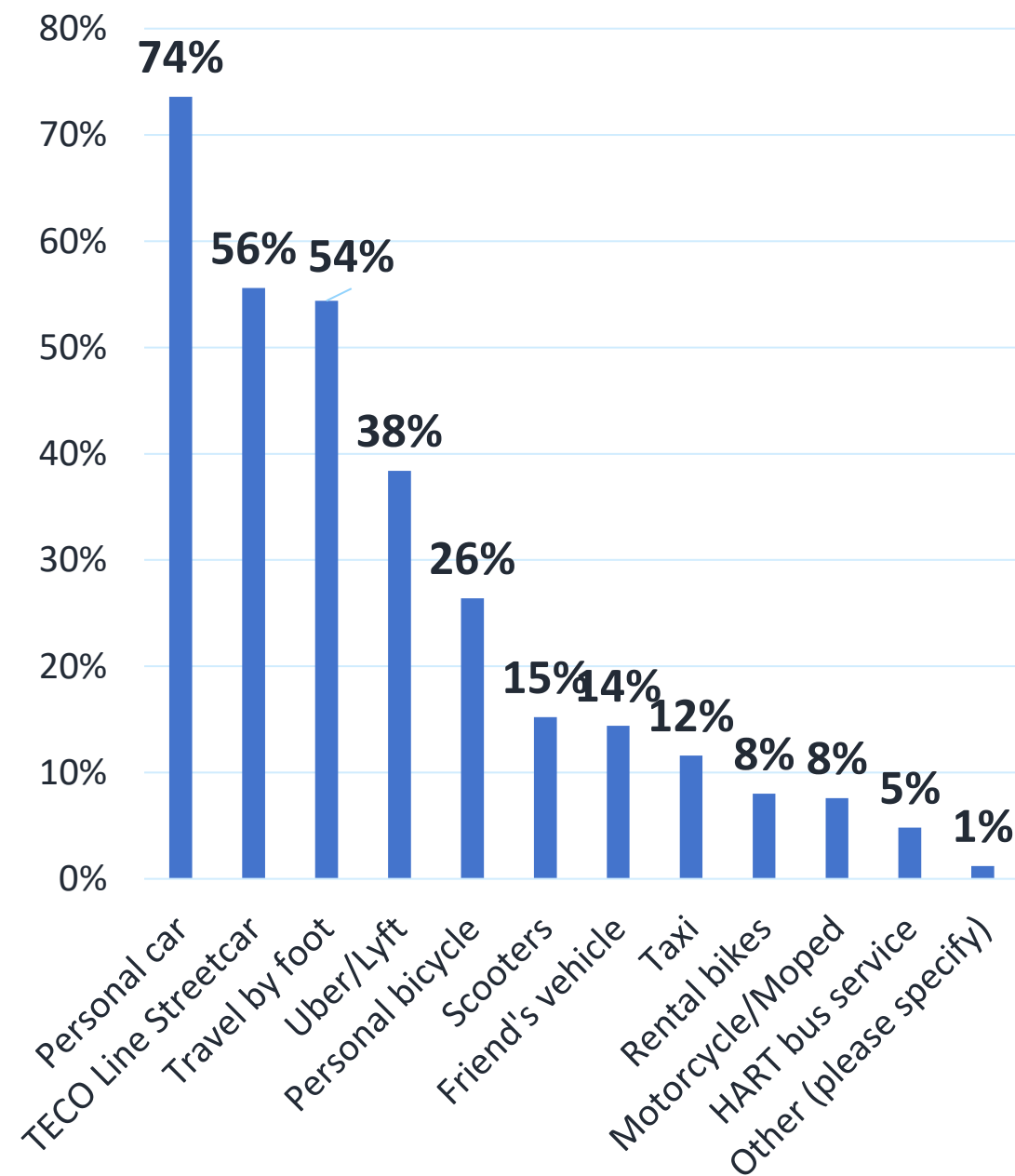




# Parking and Transportation

# Getting Around *Ybor City*

**Residents:** Do you use any of the following modes of transportation in Ybor City? Select all that apply.



- Both residents and workers most often utilize **personal cars** to get around the district
- **Walking** (traveling by foot) and the **TECO Line Streetcar** are also very popular options to get around Ybor City for both residents and workers
- Less than 1 in 10 residents and workers use **rental bikes, motorcycles, and HART bus services** in Ybor



**Workers:** Do you use any of the following modes of transportation in Ybor City? Select all that apply.

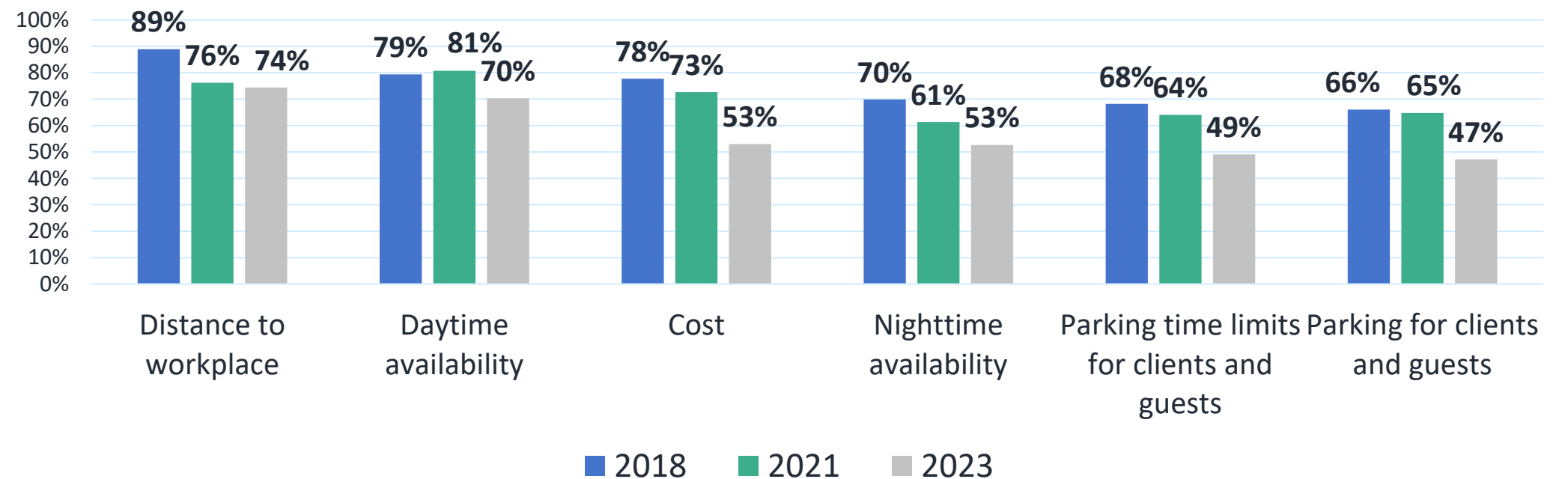
	Weekdays	Weekends	Never
Personal car	79%	58%	6%
Travel by Foot	73%	53%	6%
TECO Line Streetcar	46%	50%	25%
Uber/Lyft	20%	44%	49%
Personal bicycle	16%	24%	60%
Friend's vehicle	16%	30%	58%
Scooters	10%	25%	67%
HART bus service	9%	16%	73%
Taxi	8%	22%	68%
Motorcycle/Moped	8%	10%	79%
Rental bikes	7%	17%	72%

# Commuting to Work and Parking

## Workers: How do you normally commute to work?

	2016	2018	2021	2023	21 - 23 Change
Drive personal car	93%	95%	87%	72%	-15%
Bike	2%	1%	4%	4%	0%
Walk	2%	1%	3%	2%	-1%
Public transportation	1%	1%	2%	12%	10%
Carpool	0%	0%	1%	6%	5%
Work from home	-	-	1%	1%	0%
Skateboard	0%	0%	0%	0%	0%
Other	2%	2%	1%	2%	0%

## Workers Trending: Satisfaction (somewhat satisfied + completely satisfied) with the following aspects of parking.



**37 percent** of workers report having **free onsite parking** available.

- A large **decrease from 2018** with nearly half (49%) of respondents having free onsite parking.

Concurrently, more **workers park at paid public lots**.

- The median price to park each month has remained similar between 2021 (\$64) and 2023 (\$65)
- The most often reported cost to park for workers is \$50 a month.

**Nearly half (46%)** of workers **do not receive any parking subsidy** while 41 percent receive full coverage.

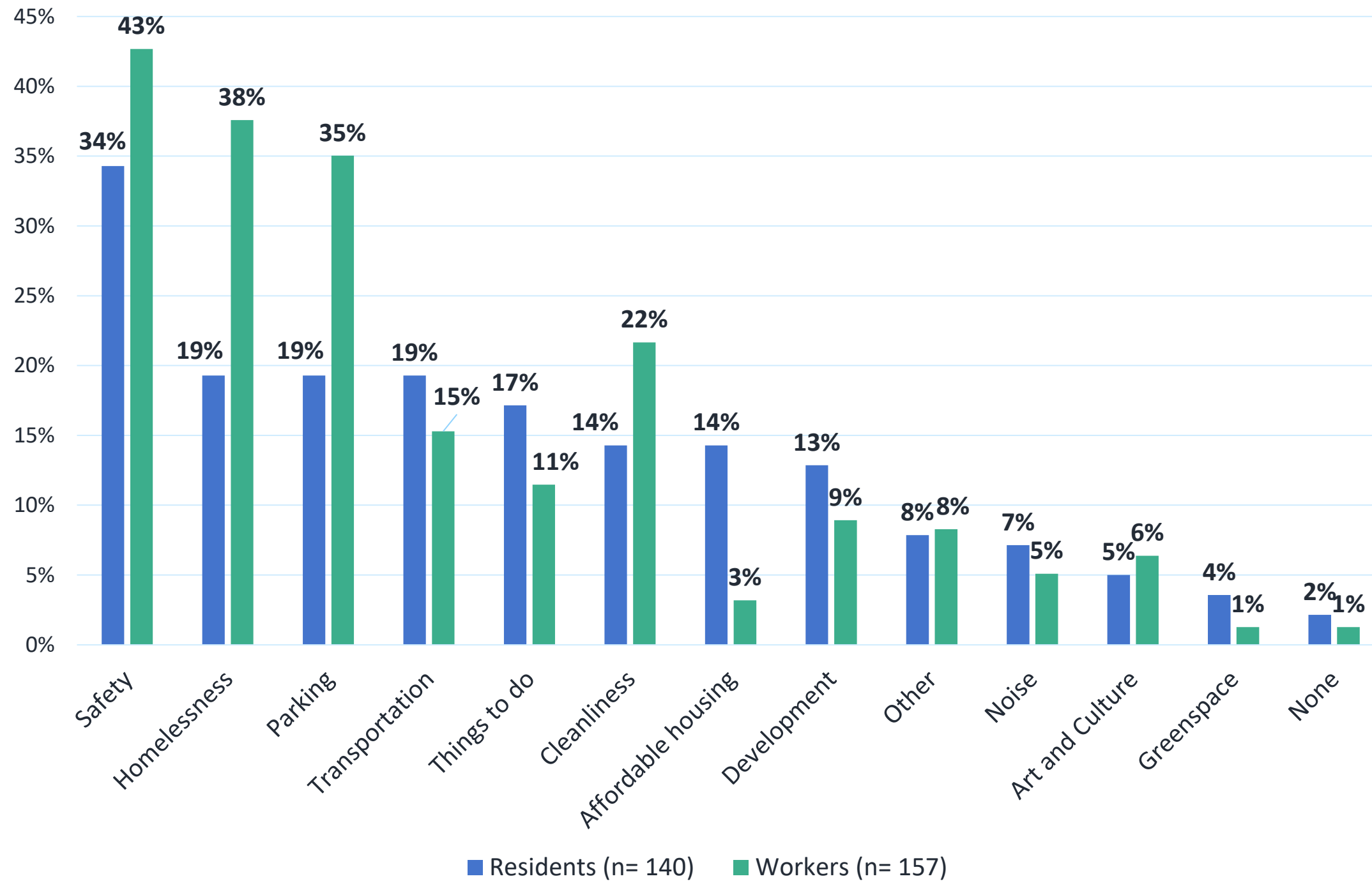
- This is a sharp departure from previous years when more than half (58% in 2018 and 77% in 2021) reported receiving full coverage.



# Safety and Security

# Ybor's Greatest Drawbacks

What are Ybor's greatest drawbacks or weaknesses?



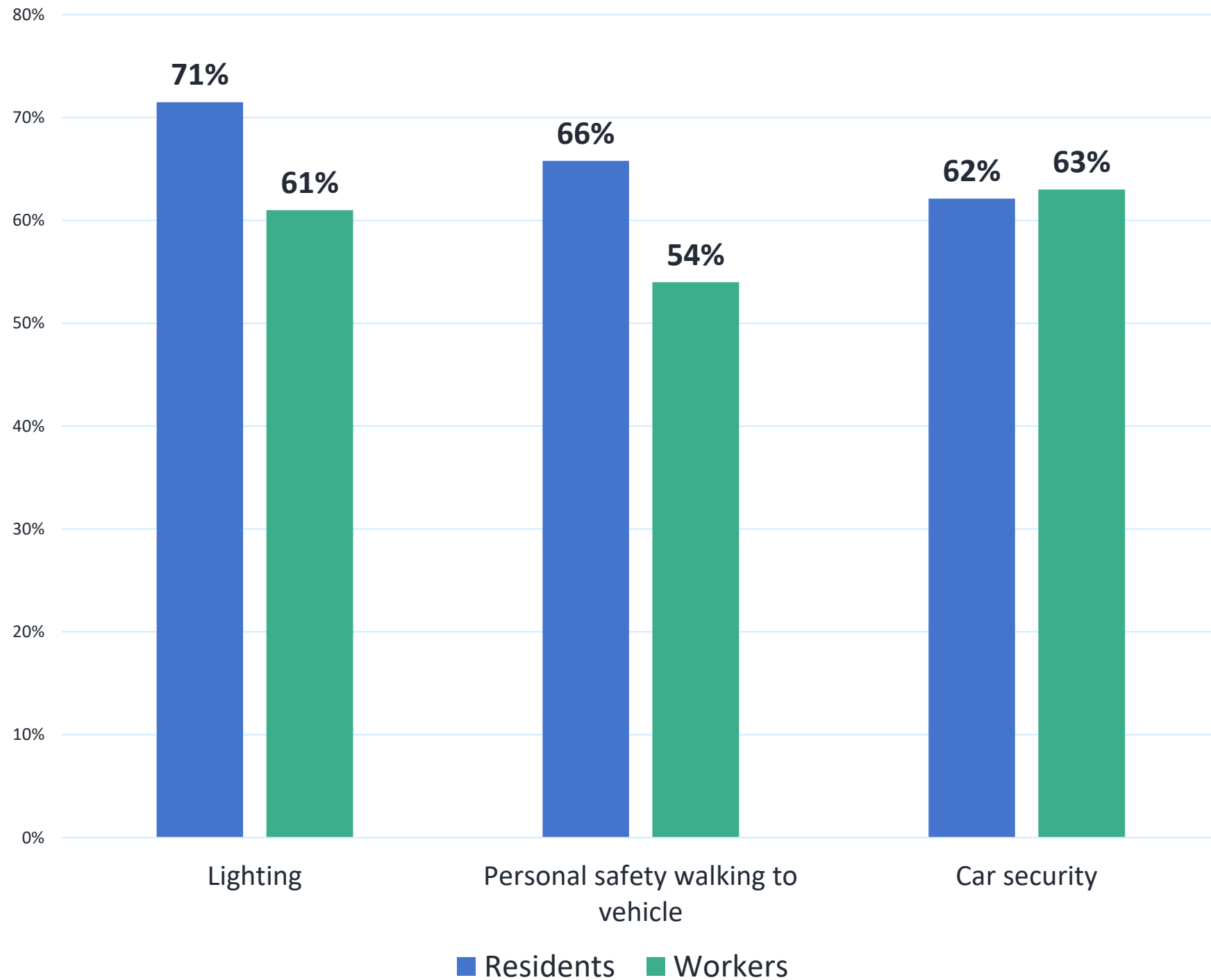
Top 5 Weaknesses in 2023

	Residents	Worker
1	Safety (34%)	Safety (43%)
2	Homelessness (19%)	Homelessness (38%)
3	Parking (19%)	Parking (35%)
4	Transportation (19%)	Cleanliness (22%)
5	Things to do (17%)	Transportation (15%)



# Safety: Parking in Ybor City

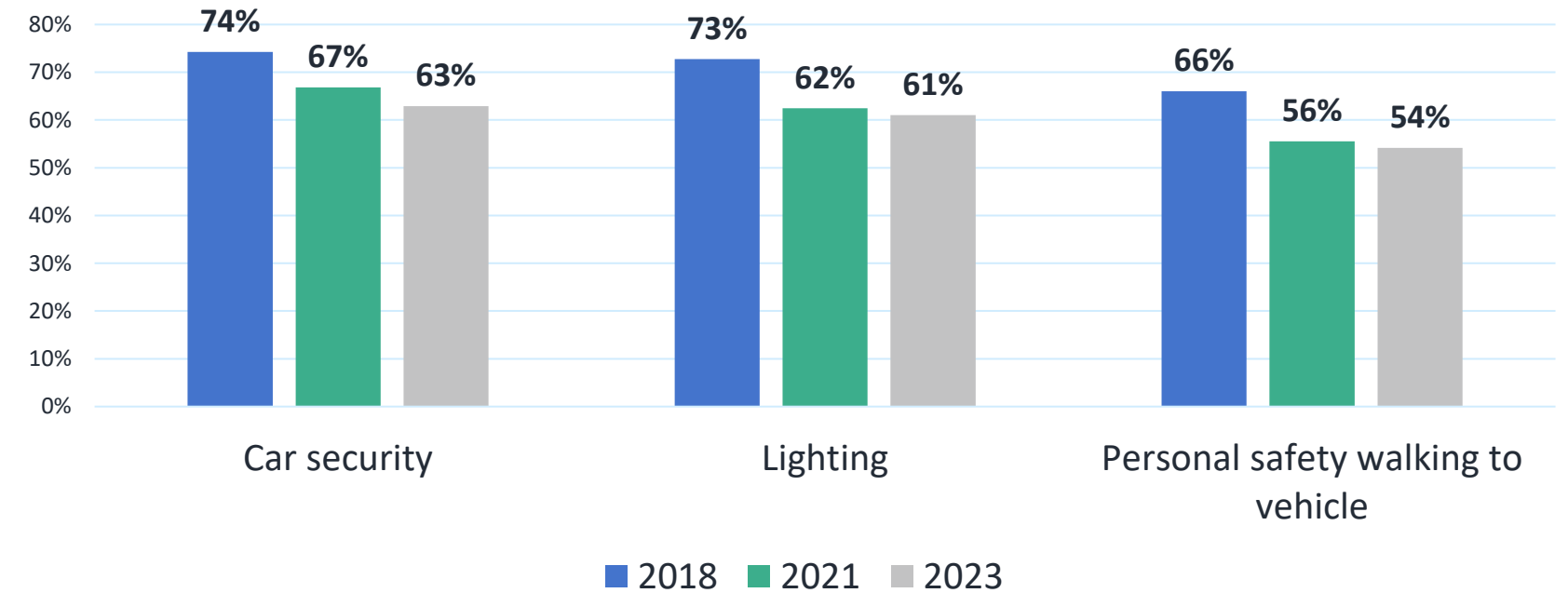
Satisfaction (somewhat satisfied + completely satisfied) with the following aspects of parking.



Resident Trending: Satisfaction with the following aspects of parking.



Workers Trending: Satisfaction with the following aspects of parking.

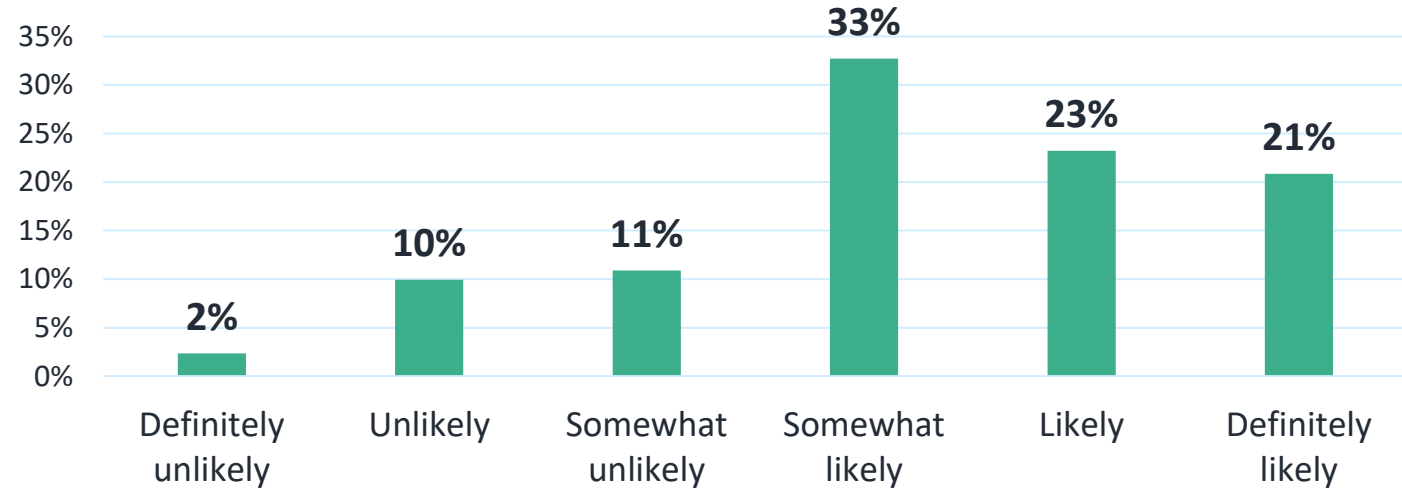




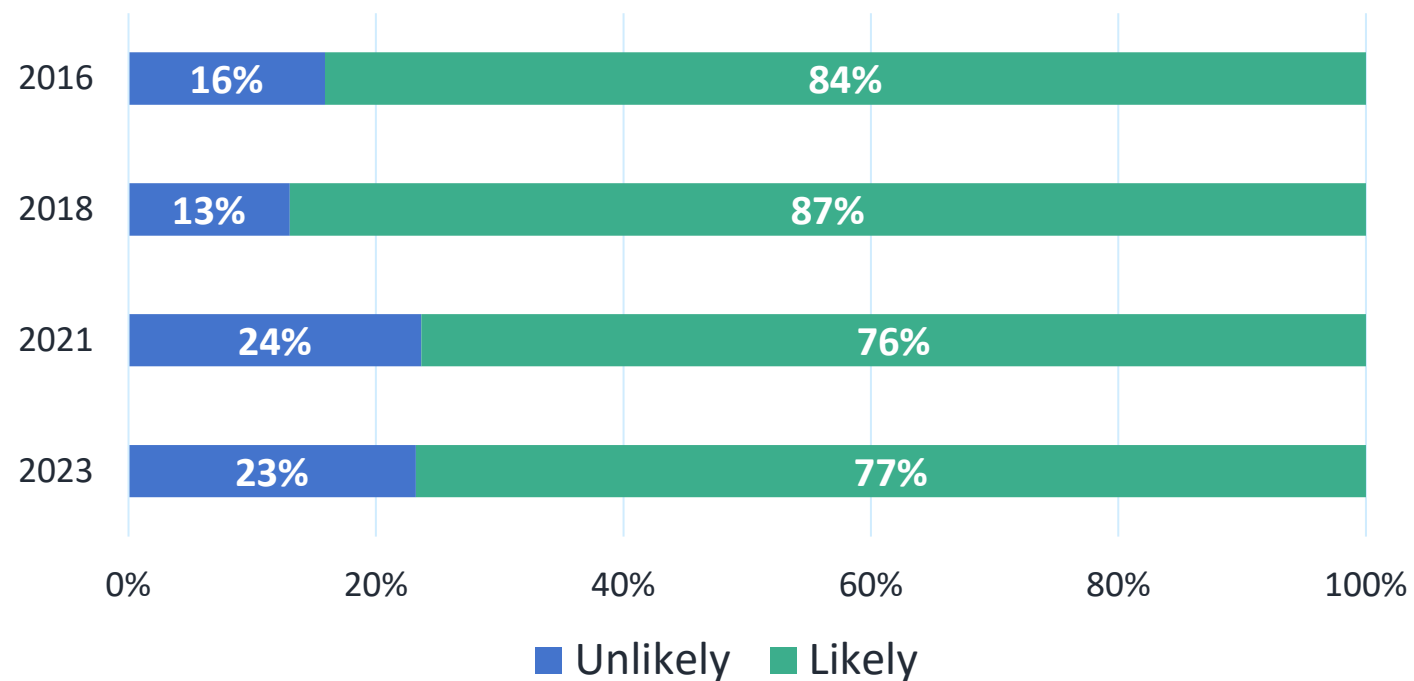
# Recommending Ybor City

# Workers: Recommending Ybor City

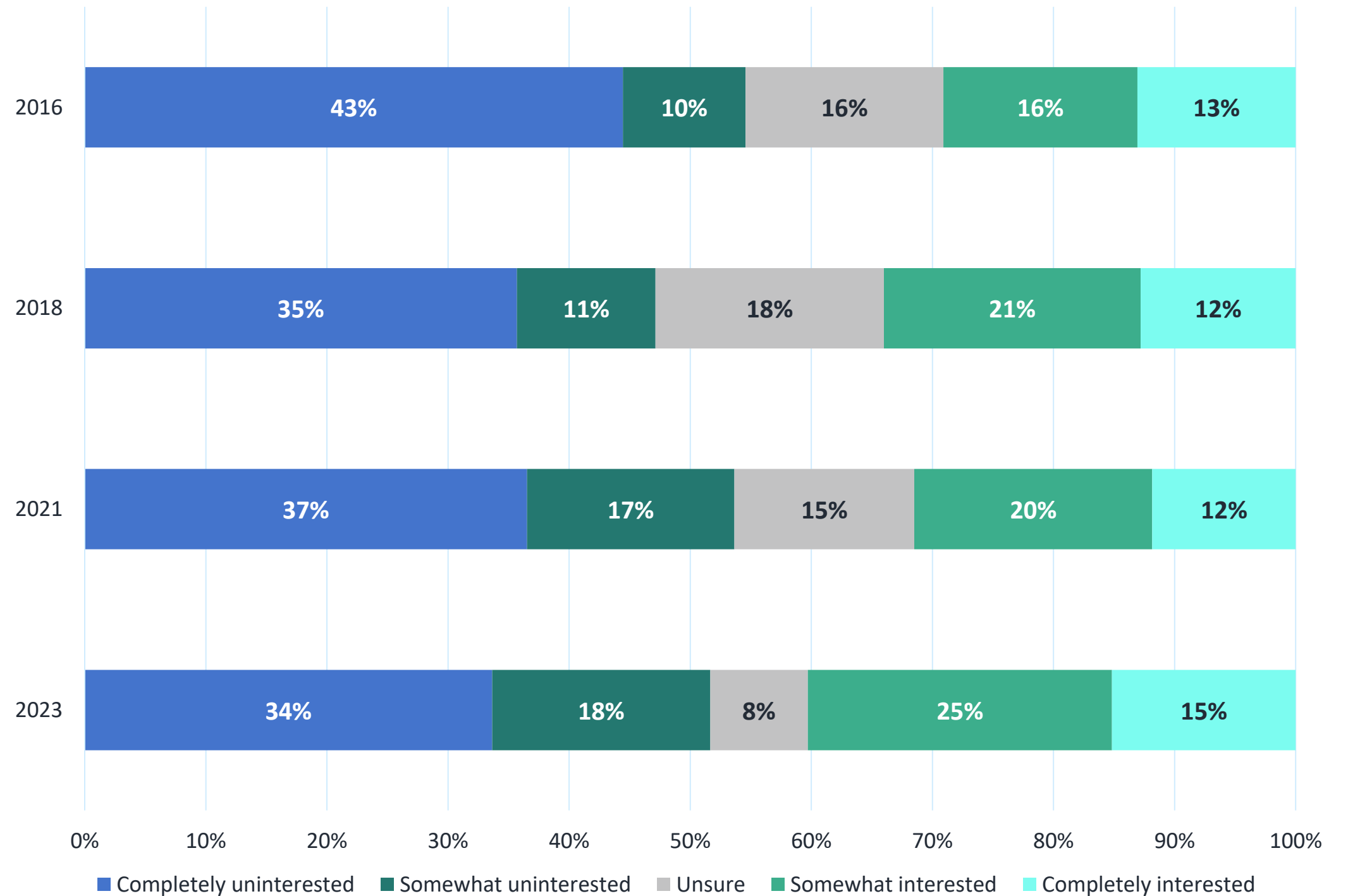
How likely are you to **recommend** Ybor City to a friend or peer as a place to **work**?



Workers Trending: How likely are you to **recommend** Ybor City to a friend or peer as a place to **work**?

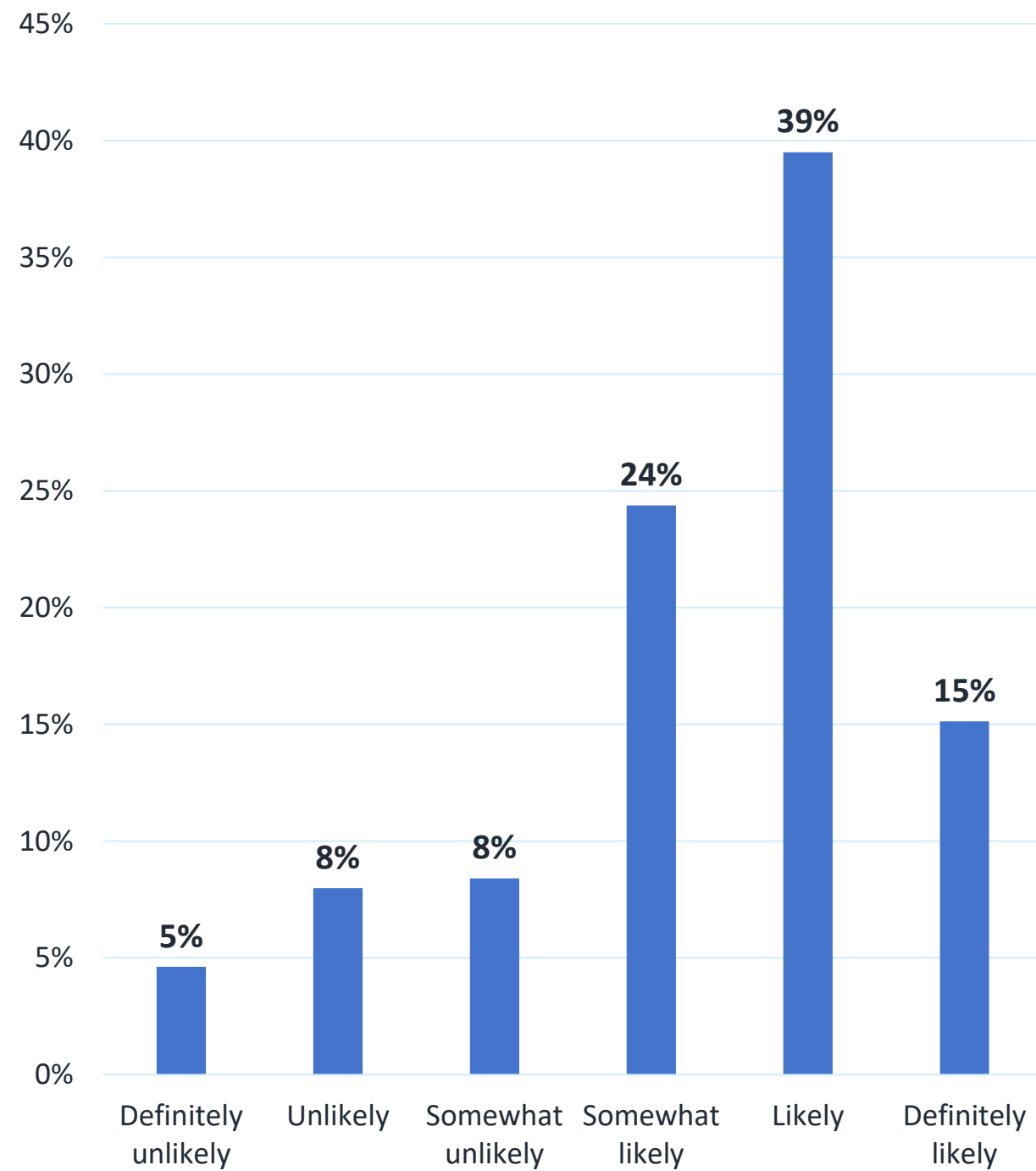


Workers Trending: How interested are you in living in Ybor City within the next five years?

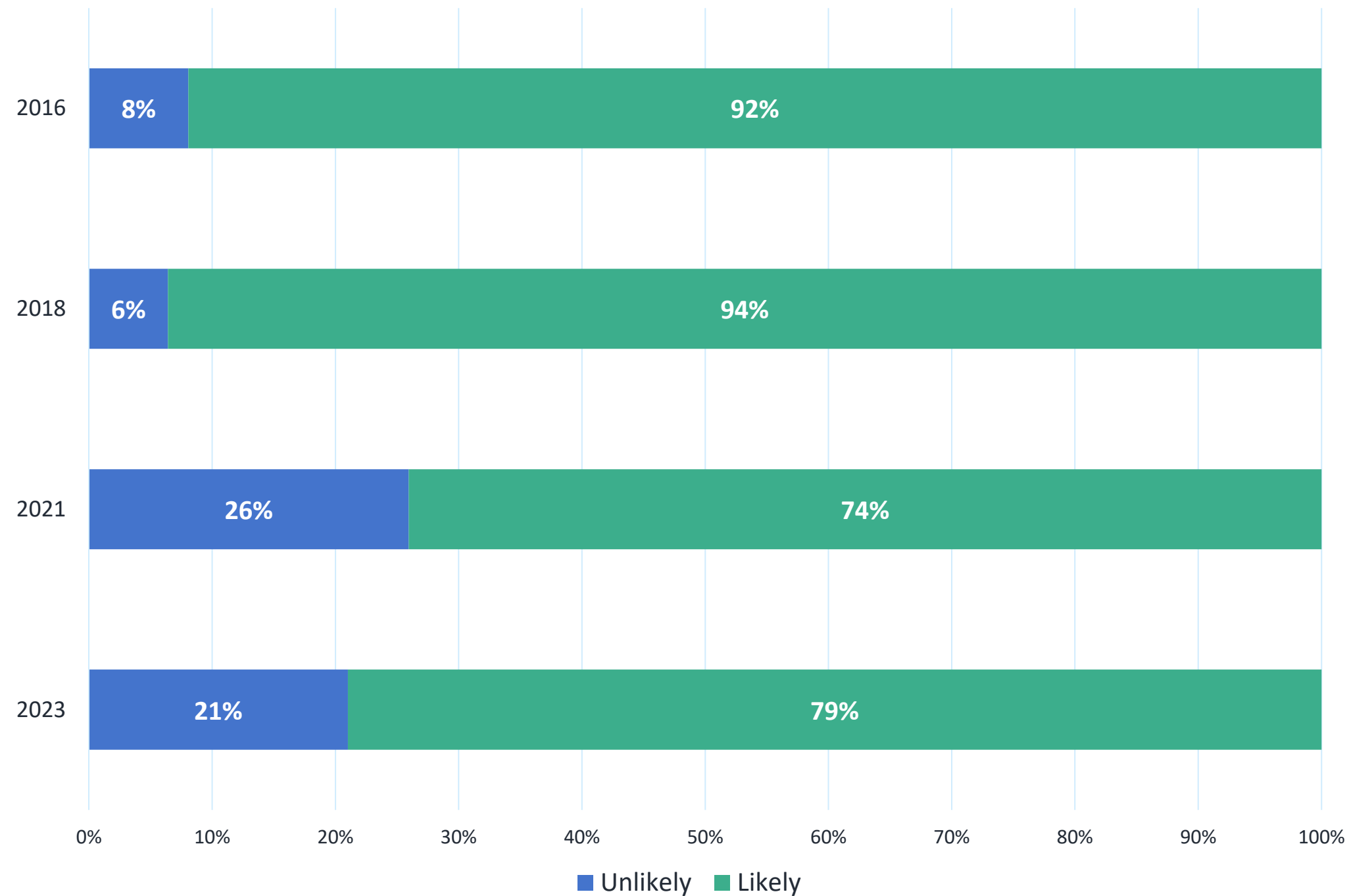


# Residents: Recommending Ybor City

How likely are you to **recommend** Ybor City to a friend or peer as a place to **live**?



Residents Trending: How likely are you to **recommend** Ybor City to a friend or peer as a place to **live**?



# Final Thoughts



## Community Activation

Residents would be likely to utilize a streetcar extension, greenway spine, and greenspace/parks if they were available or more prevalent in the district

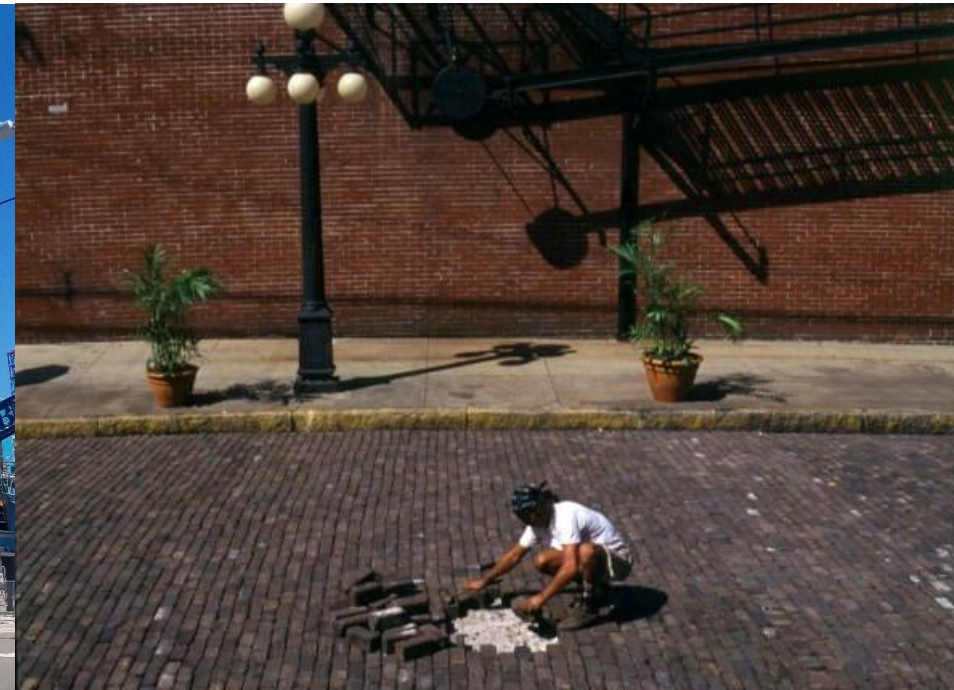
Workers express similar interest but at noticeably lower levels



## Retail Development

Residents most often leave the district for grocery shopping, casual dining, and health clubs/gyms

Workers want more fast casual dining options



## Parking and Transportation

Residents are more satisfied than workers with aspects of parking and transportation in Ybor City

Both residents and workers primarily rely on personal cars to get around the district, but the streetcar and walking are also popular



## Safety and Security

Residents and workers are least satisfied with safety in the district compared to all other characteristics

Workers are more concerned than residents about safety and homelessness

# 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](http://www.hcpassociates.com/contact).

