



2021
Ybor Resident
and Worker Study

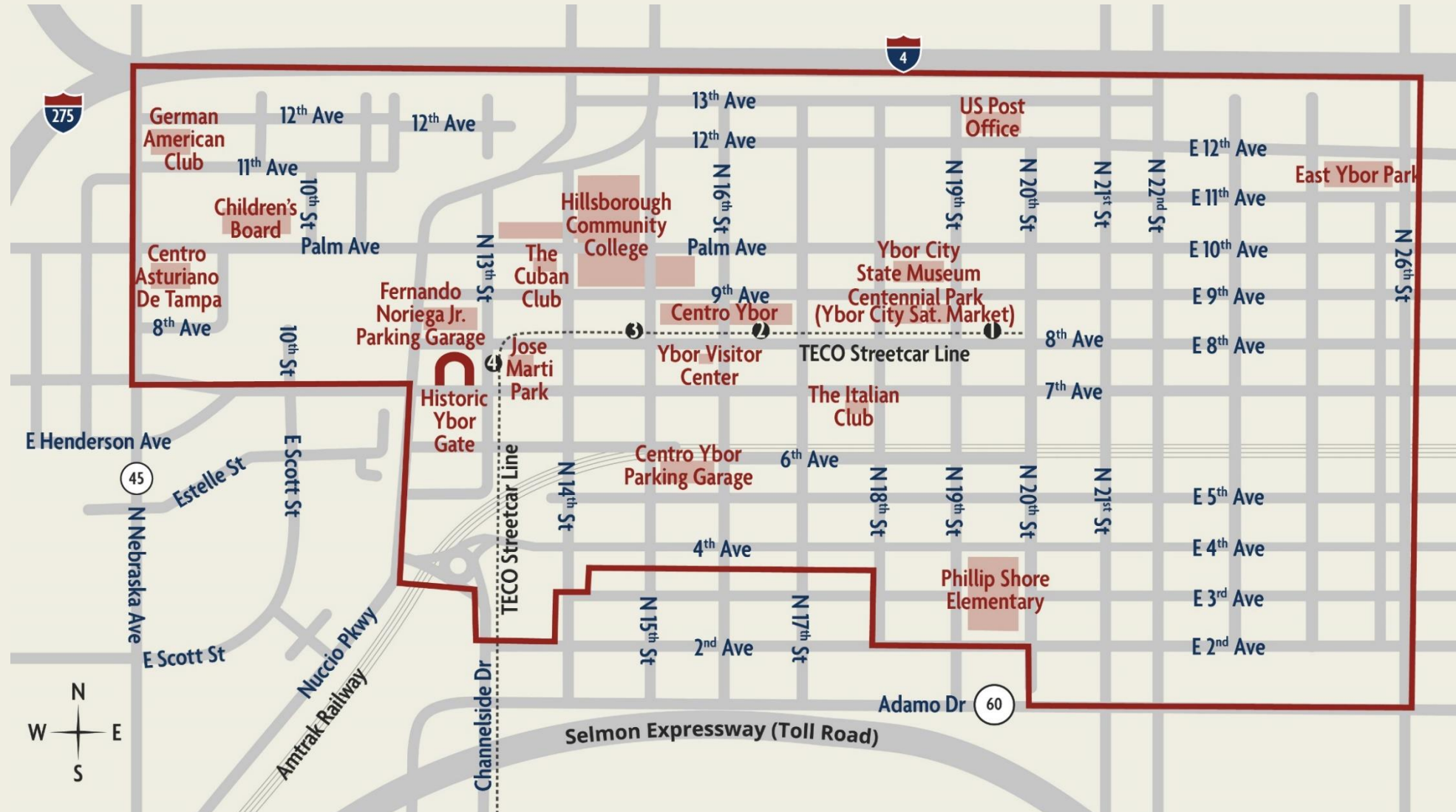
Created for the Ybor City
Development Corporation by
HCP Associates

Introduction

- In 2016, the Ybor City Development Corporation (YCDC) launched its baseline district survey of residents and workers.
 - The survey was conducted in 2018 and the third biennial installment was fielded June 15 – August 1, 2021.
- Results from prior studies brought to light requested changes and improvements deployed by YCDC and its partners, including items such as new crosswalks, 7th Avenue lighting, an extended Streetcar hours of operation trial, the See Something Say Something program, new corporate headquarters, new residential dwellings, and much more.
- The district is growing and as such, YCDC continues to seek feedback on amenities, programs and activities through the District study.



Region of Study: Ybor CRA 1 and 2



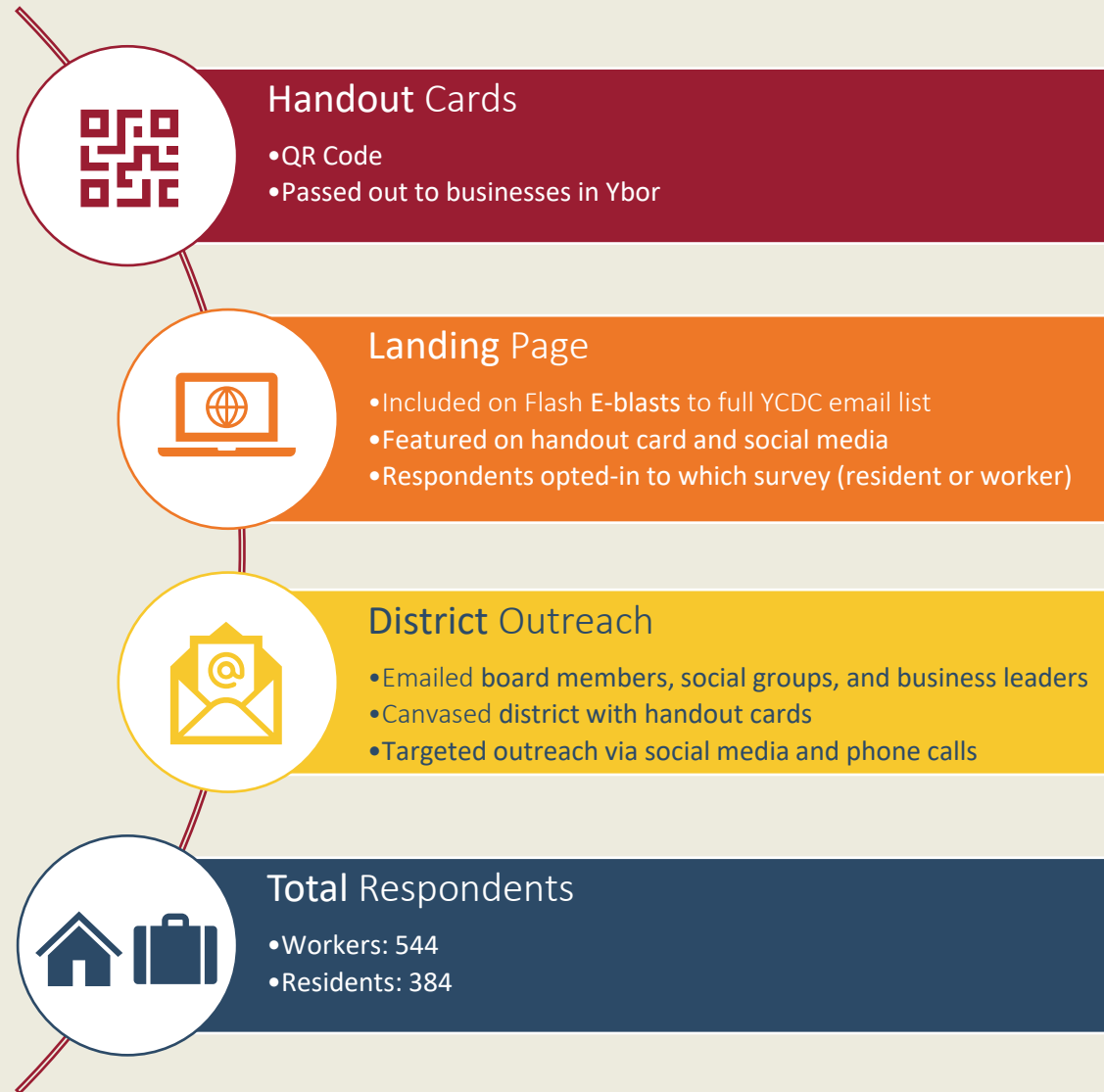
Methodology

Do you live or work in Ybor?

Do you have thoughts on changes or improvements? We want to hear from you!



Take the Survey
YborCityOnline.com/Survey





DO YOU LIVE OR
WORK IN YBOR?

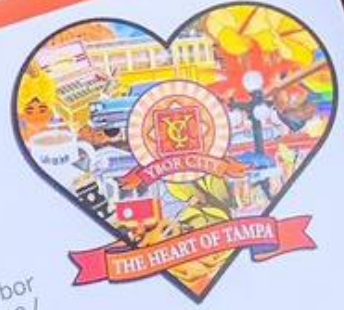
*Do you have thoughts on
changes or improvements?
We want to hear from you!*

Share your opinions with the Ybor
Community Advisory Committee /
Ybor City Development Corporation
through an online survey, which
takes approximately 10 minutes.

yborcityonline.com/survey

Please spread the word!

Survey participants can enter for a
chance to win various gift cards to Ybor
businesses, including a one-night stay at
Hotel Haya!



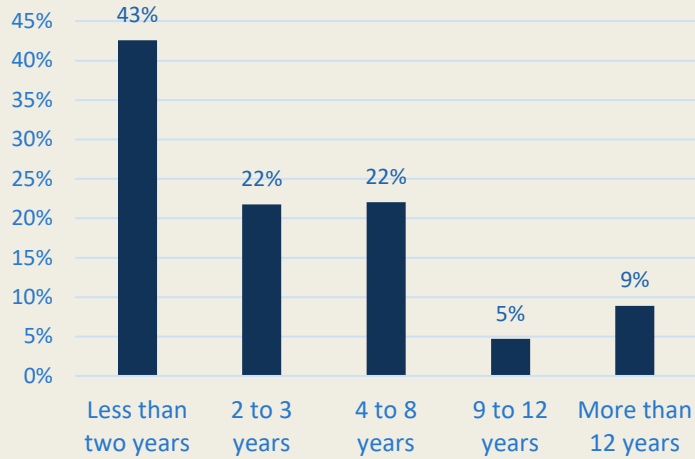
Take the Survey

Workers

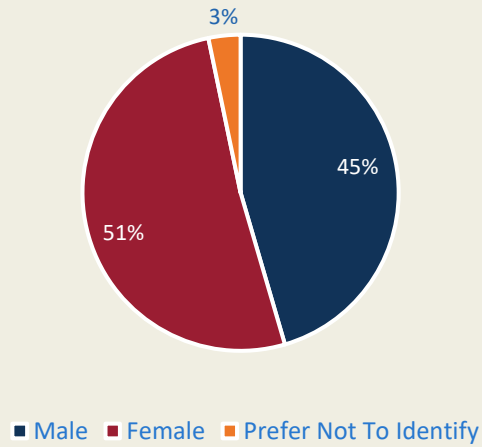
Demographics



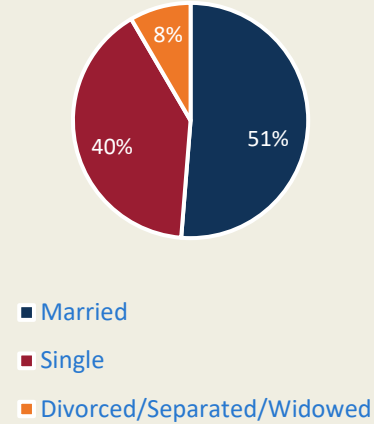
How long have you worked in Ybor City?



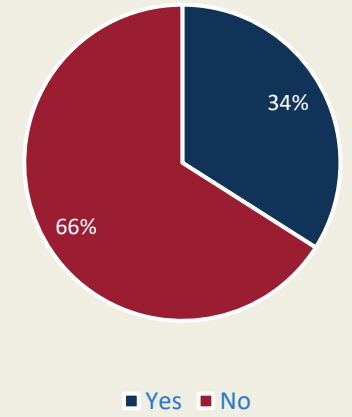
Gender



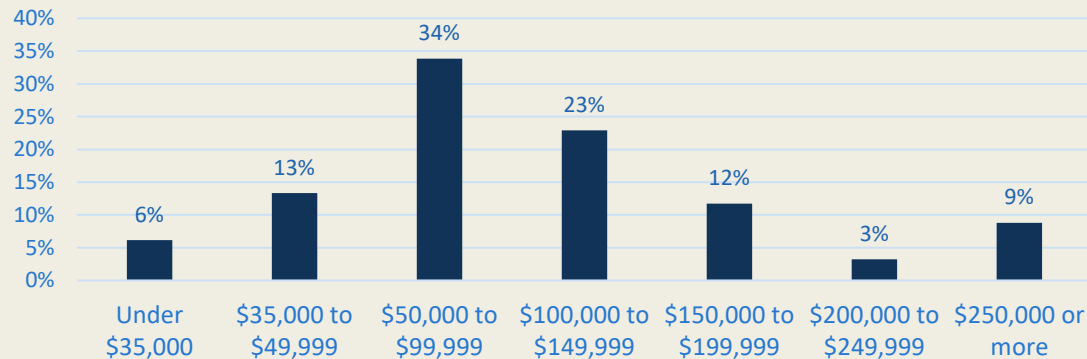
Marital Status



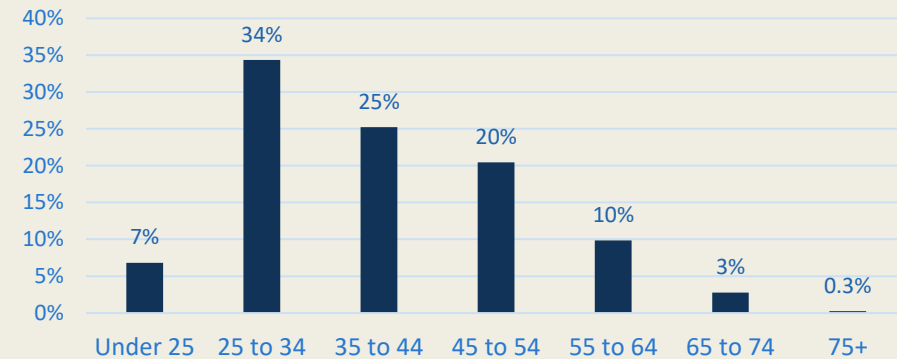
Children in Household



Annual Household Income Range



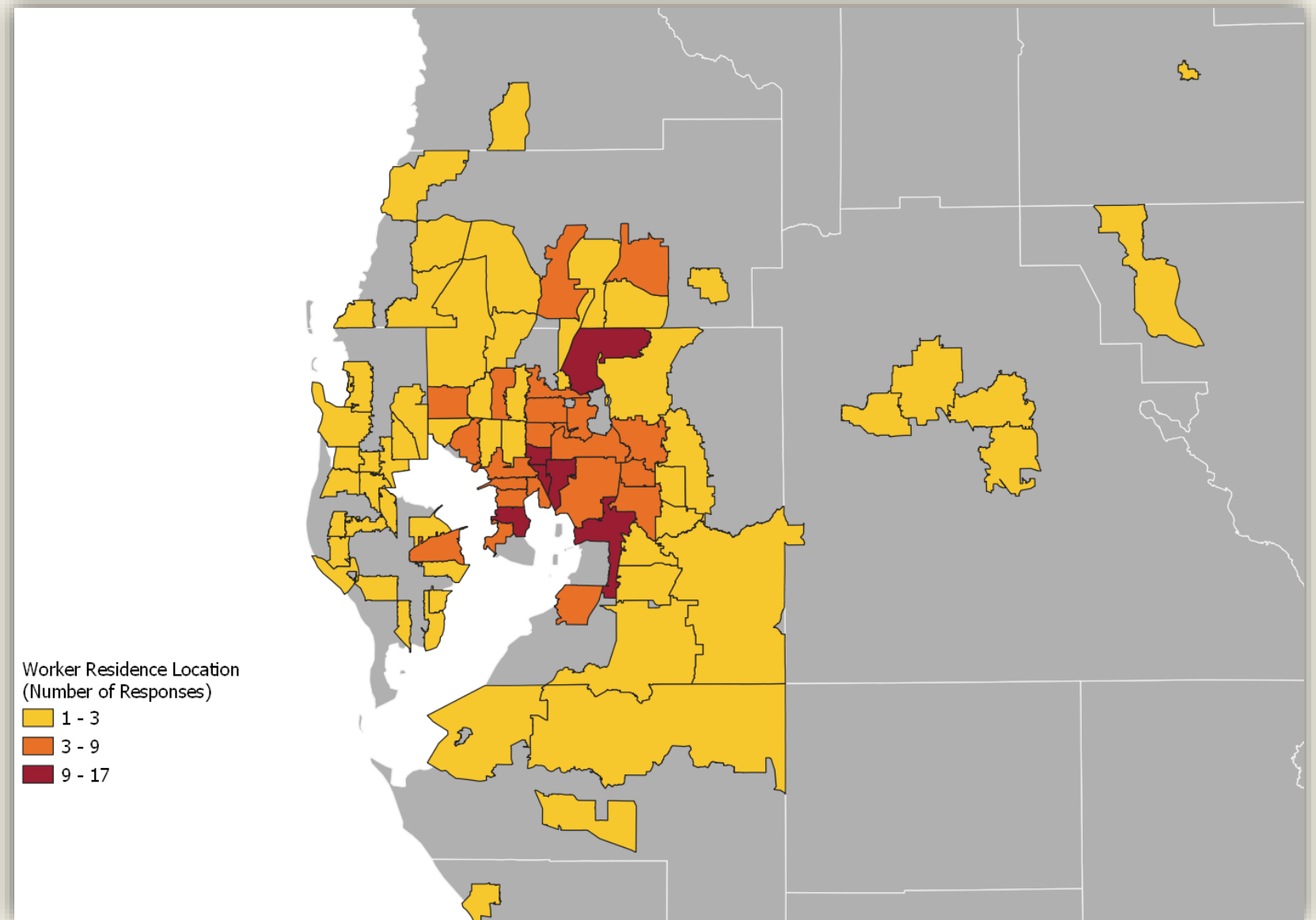
Age Range





Home Zip Code

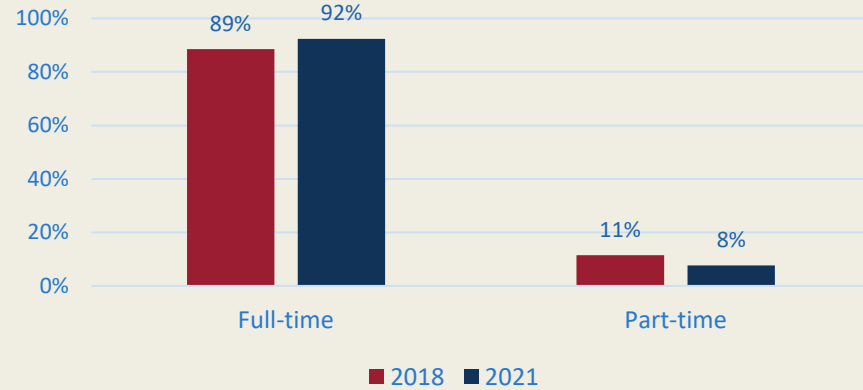
- Ybor's workers live across Tampa Bay
- They are most concentrated in the Downtown and South Tampa areas



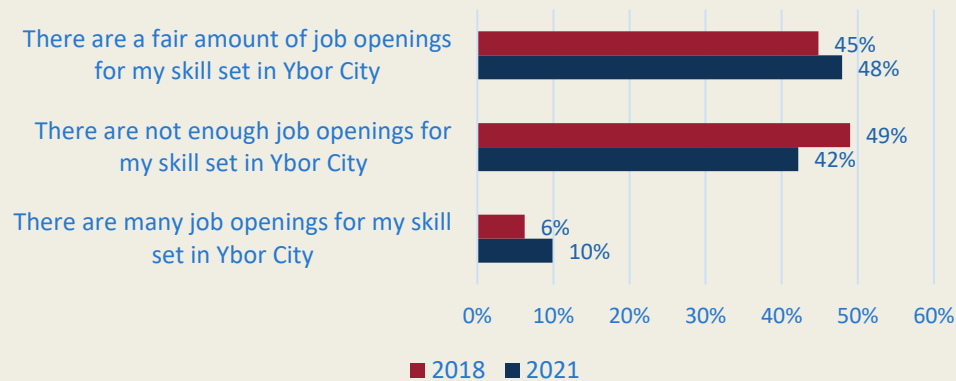
Employment



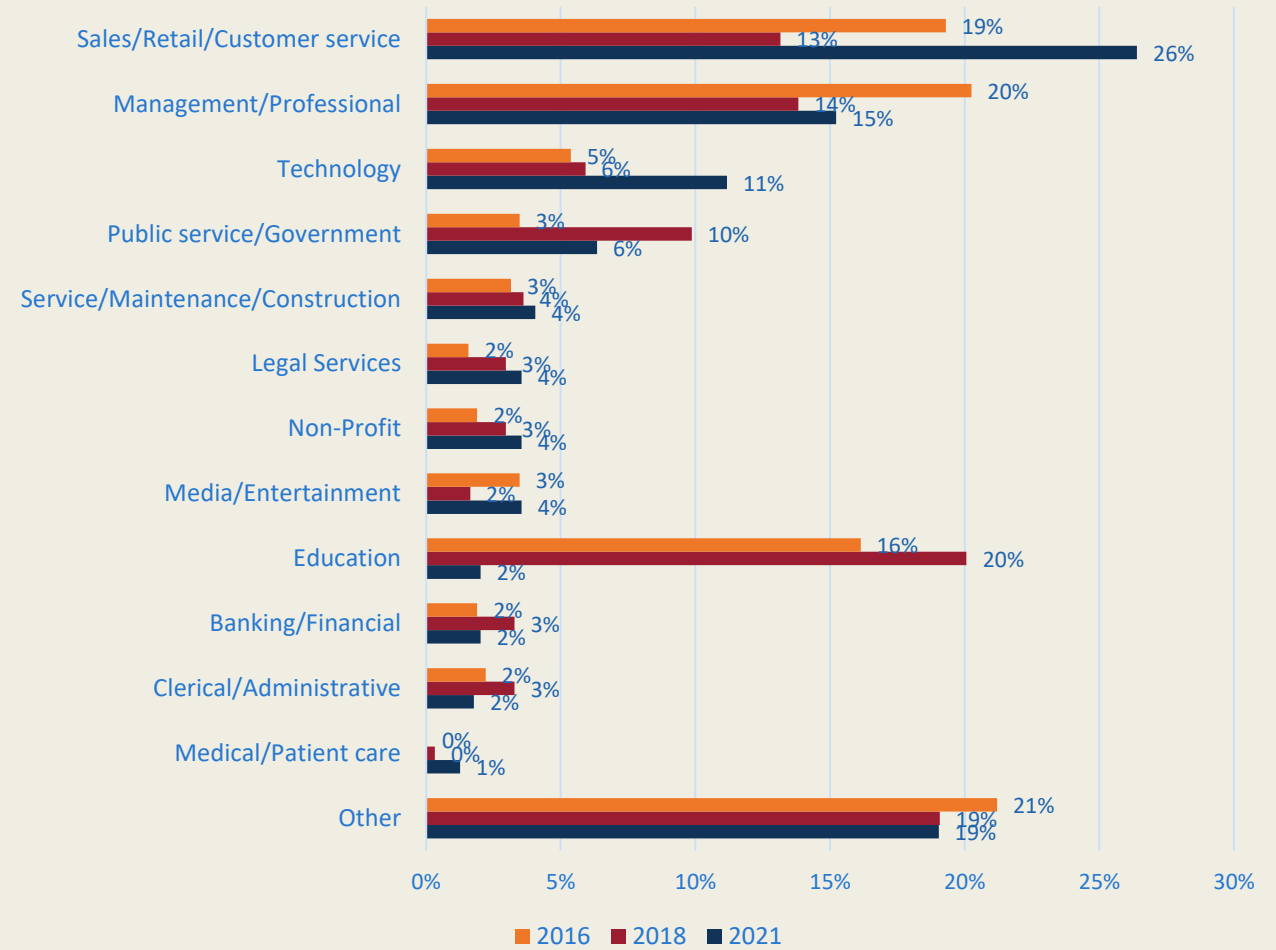
Are you employed full-time or part-time?



Thinking about what is available for your skillset in Ybor, which do you believe to be true?



What is your industry of employment?



Other includes professions in the following industries: Accounting, architecture, hospitality, manufacturing, and real estate



Important to You as an Ybor Employee

On a scale from 1 to 10 where 1 is 'extremely unimportant' and 10 is 'extremely important,' how important are each of the following to you, as an Ybor employee?	2016	2018	2021	Δ
Strong sense of personal safety	9.27	9.31	8.94	↓
Public area cleanliness	-	9.00	8.73	↓
Good parking accessibility	8.72	8.67	8.48	↓
Walkable city	8.45	8.66	8.36	↓
Diversity in food/beverage options	8.13	8.30	8.12	↓
Affordable parking	8.24	8.45	8.03	↓
Incoming/outgoing traffic flow	8.36	8.39	7.74	↓
In-town traffic circulation	7.97	7.87	7.36	↓
Things to do	7.45	7.74	7.34	↓
Sense of community	-	7.88	6.99	↓
Diversity in shopping/retail options	7.11	7.18	6.95	↓
Art-filled streetscapes	6.41	6.88	6.51	↓
Festivals and events	6.64	6.98	6.44	↓
Car-free transportation options	-	-	6.25	



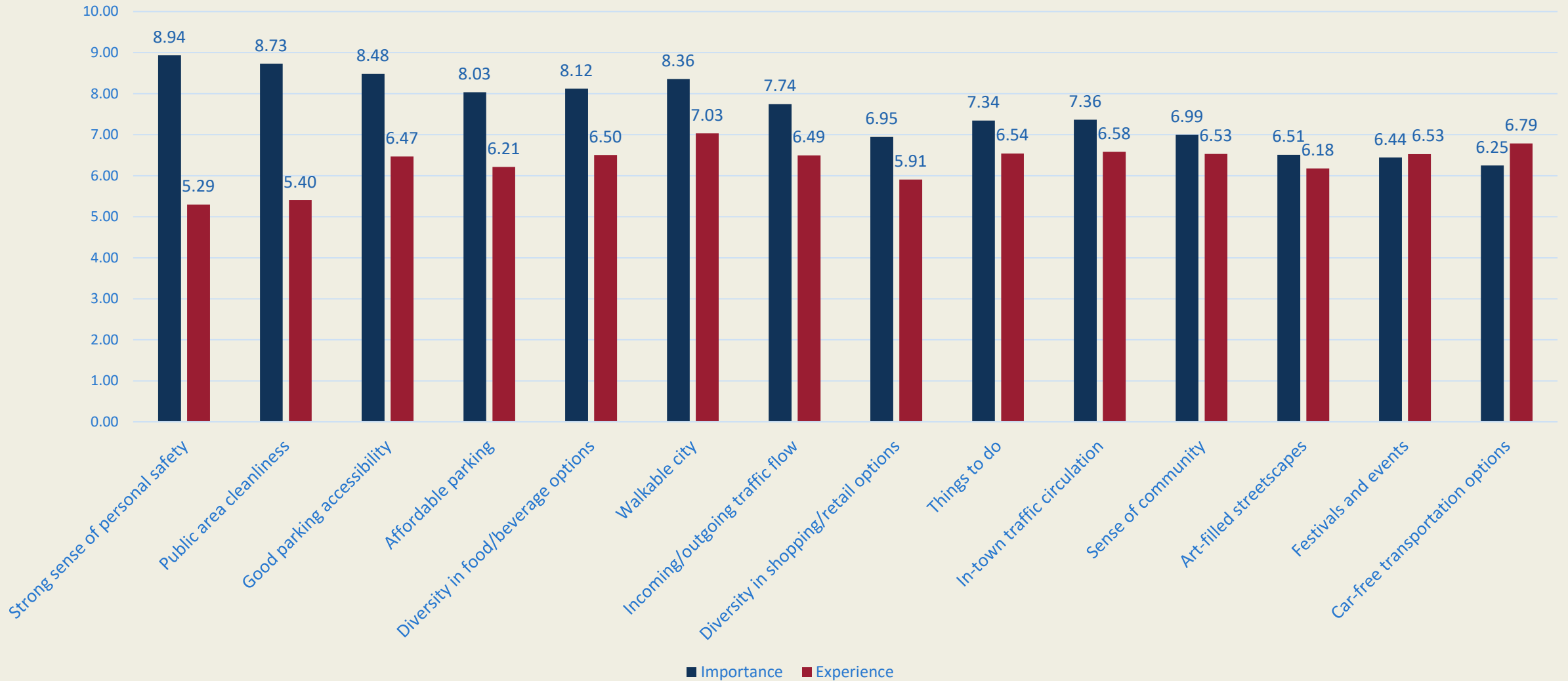
Experience as an Ybor Employee

On a scale from 1 to 10 where 1 is 'extremely dissatisfied' and 10 is 'extremely satisfied,' how satisfied are you with your experience as a worker in Ybor City, with each of the following?	2016	2018	2021	Δ
Walkable city	6.95	7.28	7.03	↓
Car-free transportation options	-	-	6.79	
In-town traffic circulation	5.96	6.59	6.58	↓
Things to do	6.74	6.83	6.54	↓
Sense of community	-	6.61	6.53	↓
Festivals and events	6.85	7.07	6.53	↓
Diversity in food/beverage options	6.88	6.81	6.50	↓
Incoming/outgoing traffic flow	5.84	6.59	6.49	↓
Good parking accessibility	6.35	6.59	6.47	↓
Affordable parking	6.48	6.32	6.21	↓
Art-filled streetscapes	6.22	6.31	6.18	↓
Diversity in shopping/retail options	5.92	6.05	5.91	↓
Public area cleanliness	-	6.08	5.40	↓
Strong sense of personal safety	5.52	5.78	5.29	↓

Expectation Gaps



Expectation Gap



Expectation Gap Trending

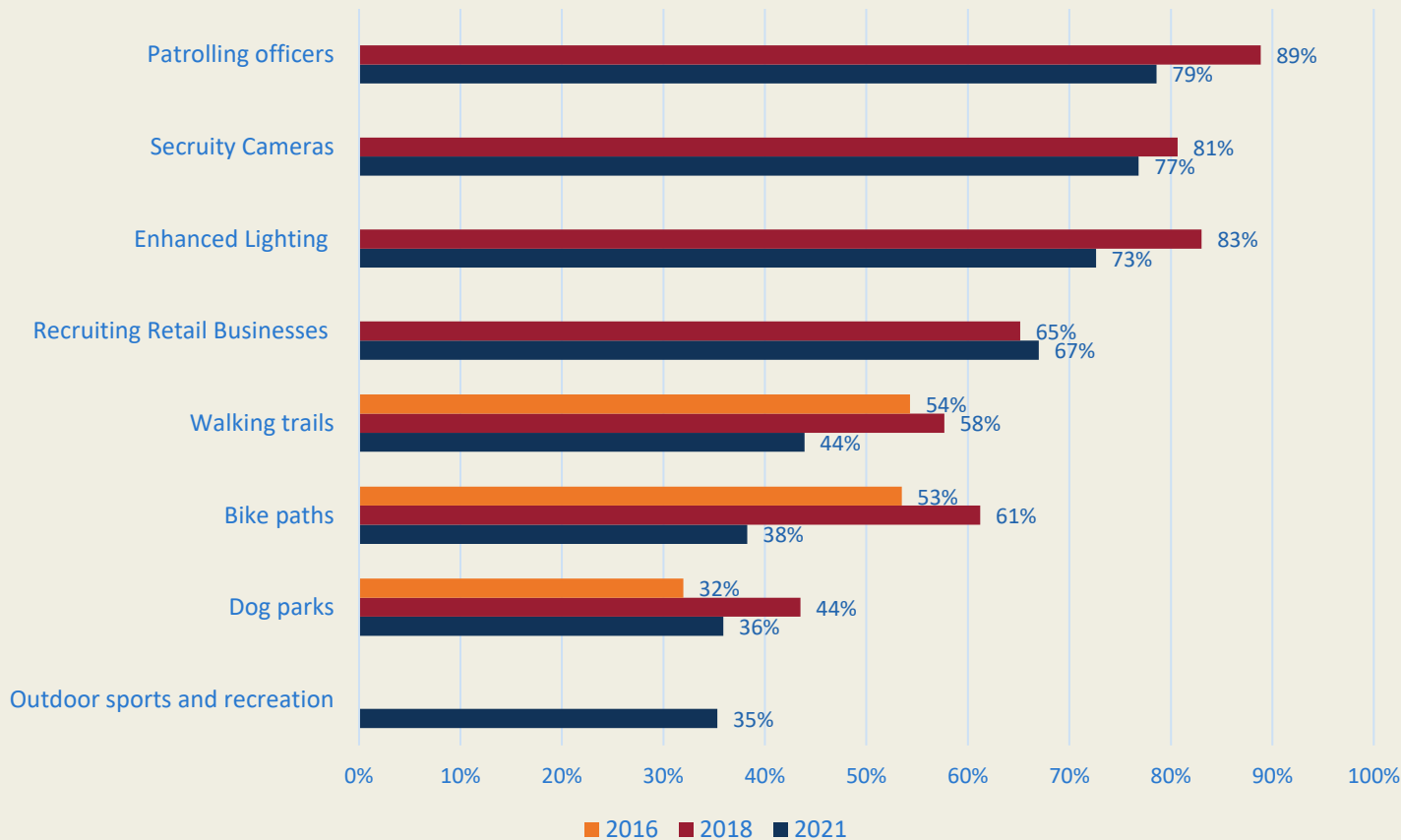


Top Worker Expectation Gaps: Trending					
2016 Top 5 Gaps		2018 Top 5 Gaps		2021 Top 5 Gaps	
Strong sense of personal safety	3.75	Strong sense of personal safety	3.53	Strong sense of personal safety	3.64
Incoming/outgoing traffic flow	2.52	Public area cleanliness	2.92	Public area cleanliness	3.32
Good parking accessibility	2.37	Affordable parking	2.13	Good parking accessibility	2.01
In-town traffic circulation	2.01	Good parking accessibility	2.08	Affordable parking	1.82
Affordable parking	1.76	Incoming/outgoing traffic flow	1.80	Diversity in food/beverage options	1.62

Level of Priority



What level of priority should Ybor City place on developing or improving the following within the district?
'Very high priority' and 'High priority'



Respondents stated priority should be placed on 'Other,' which can be summarized by the following categories:

- Cleanliness & Beautification
- Promoting Arts
- Safety



Retail Recruitment

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

- Workers were most interested in fast-food or fast-casual dining options
- In addition to naming many popular brands– such as Chipotle and Fresh Kitchen– many workers expressed that they wanted a place to grab breakfast or lunch that was quick



How Often do You Leave Ybor? Trending

In a typical 30 days, how often do you leave Ybor City for any of the following, during the workday?
Leaves Ybor at some frequency in 30 days

	2018	2021
Casual dining restaurants	81%	78%
Grocery stores	73%	65%
Coffee shops/Cafes	63%	61%
Fine dining restaurants	56%	61%
Convenience stores	59%	57%
Pharmacies/Drug stores	61%	56%
Clothing stores/Boutiques	52%	54%
Health clubs/Gyms	36%	44%
Hair/Nail salon	38%	44%
Home furnishing stores	28%	38%
Electronics stores	29%	37%
Dry cleaners	23%	35%
Book/Music stores	35%	34%
Florists	23%	32%
Laundromats	10%	23%

*Categories highlighted have increased from 2018

7th Avenue Rebricking



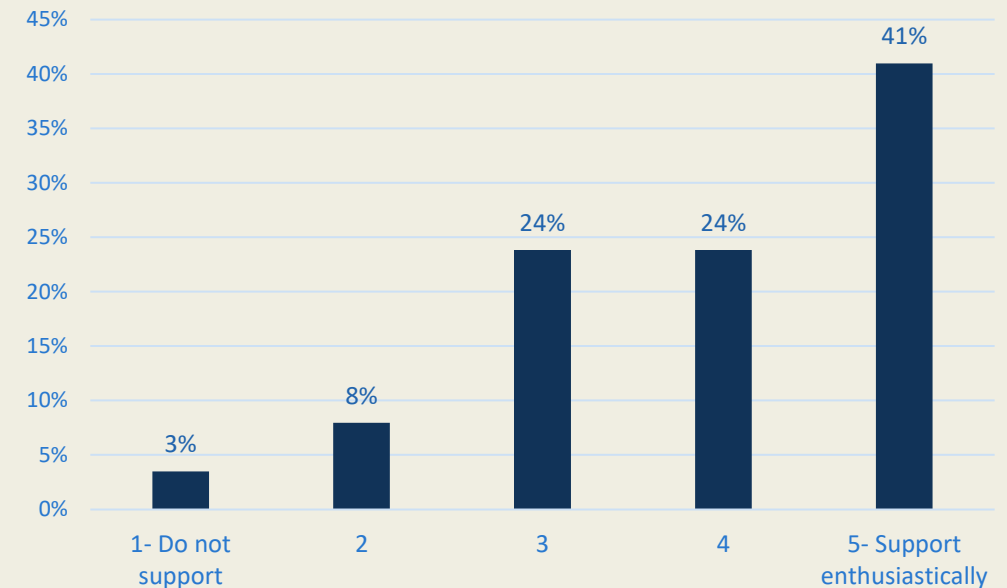
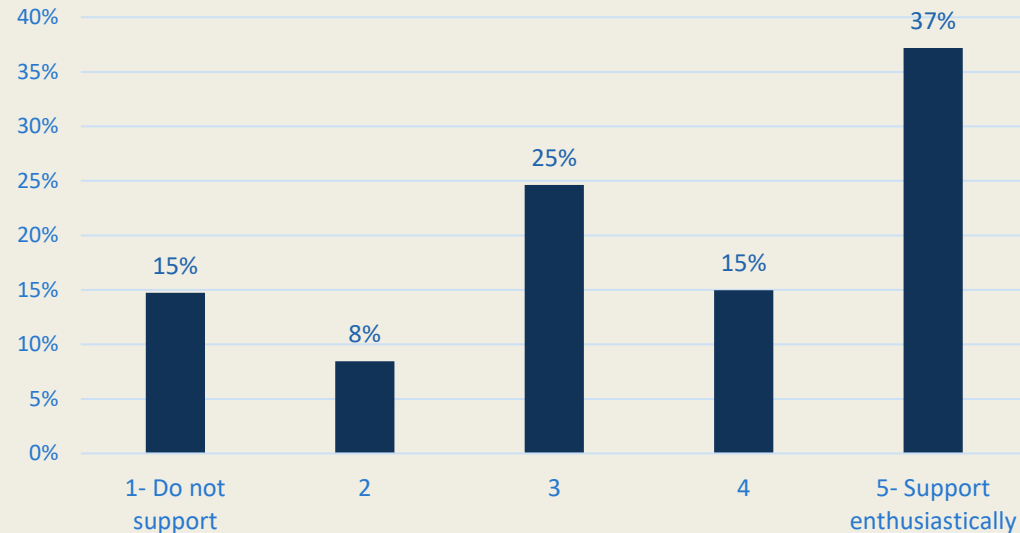
In the past, 7th Avenue was a brick road. As part of the strategy to reinstate an element of historical character of Ybor City, the community has asked the City of Tampa to consider rebricking 7th Avenue from Nuccio Parkway to 26th Street.

To facilitate rebricking 7th Avenue, certain blocks would be closed to vehicular traffic in phases for approximately 30 to 60 days, while sidewalks would remain open to pedestrians.

Rate how you feel about this on the scale below where one is 'do not support' and five is 'support enthusiastically.'

In light of this, rate your level of support for the rebricking of 7th Avenue where one is 'do not support' and five is 'support enthusiastically.'

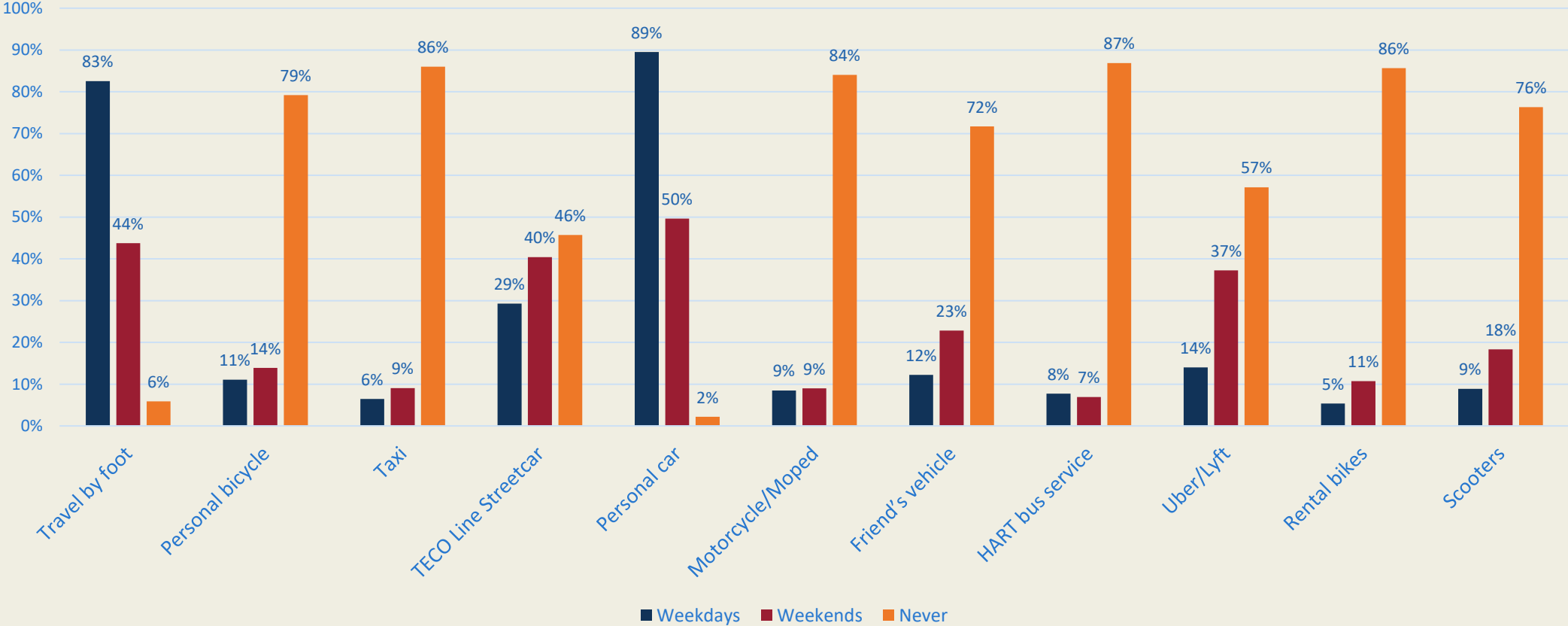
(Base: Those that rated 3, 4, or 5 on previous question)



Modes of Transportation



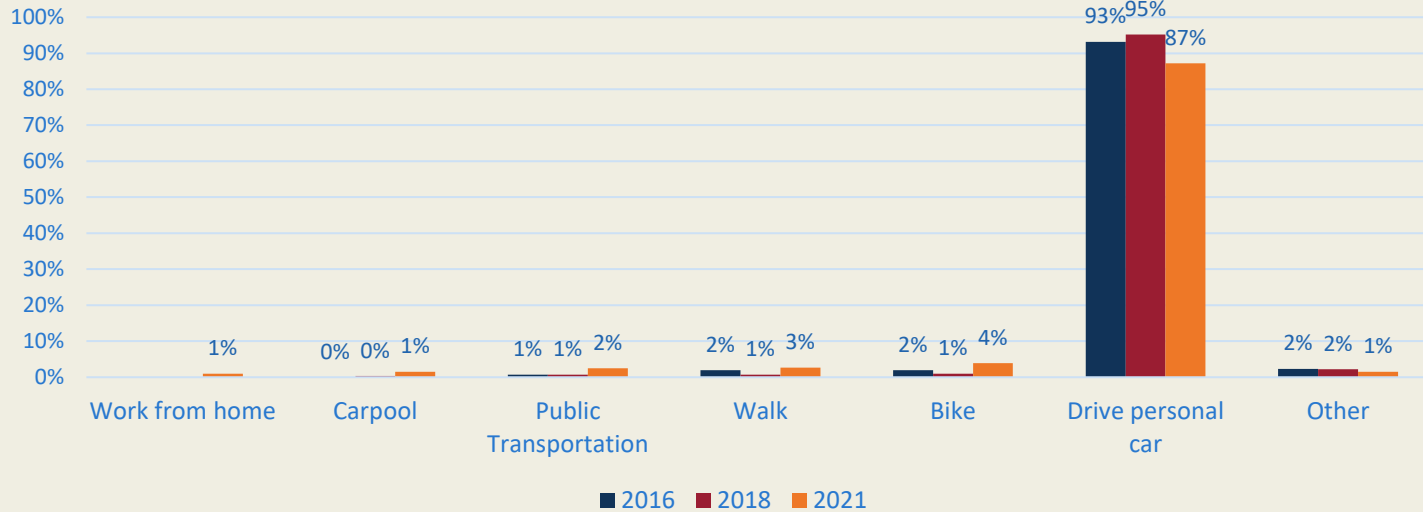
Do you use any of the following modes in Ybor City? Select all that apply.



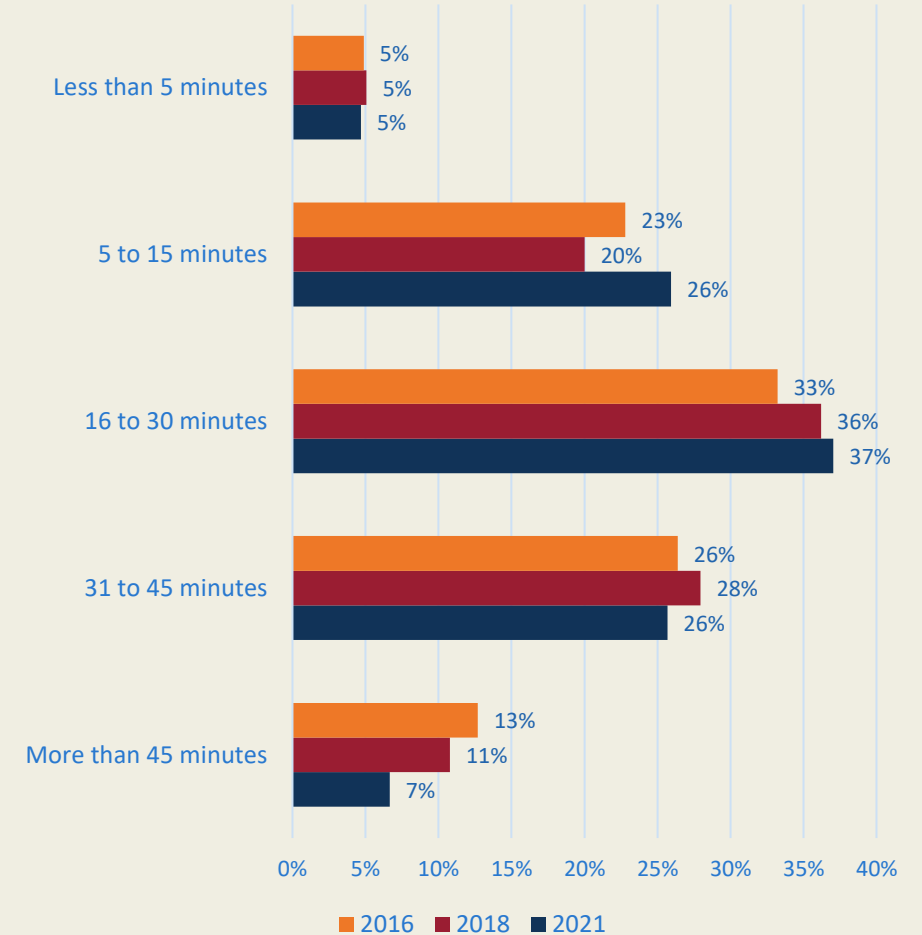
Commute to Work



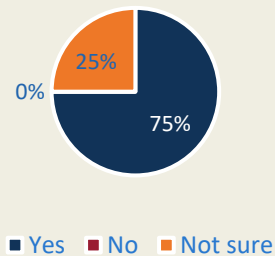
How do you normally commute to work?



How long is your commute to work?



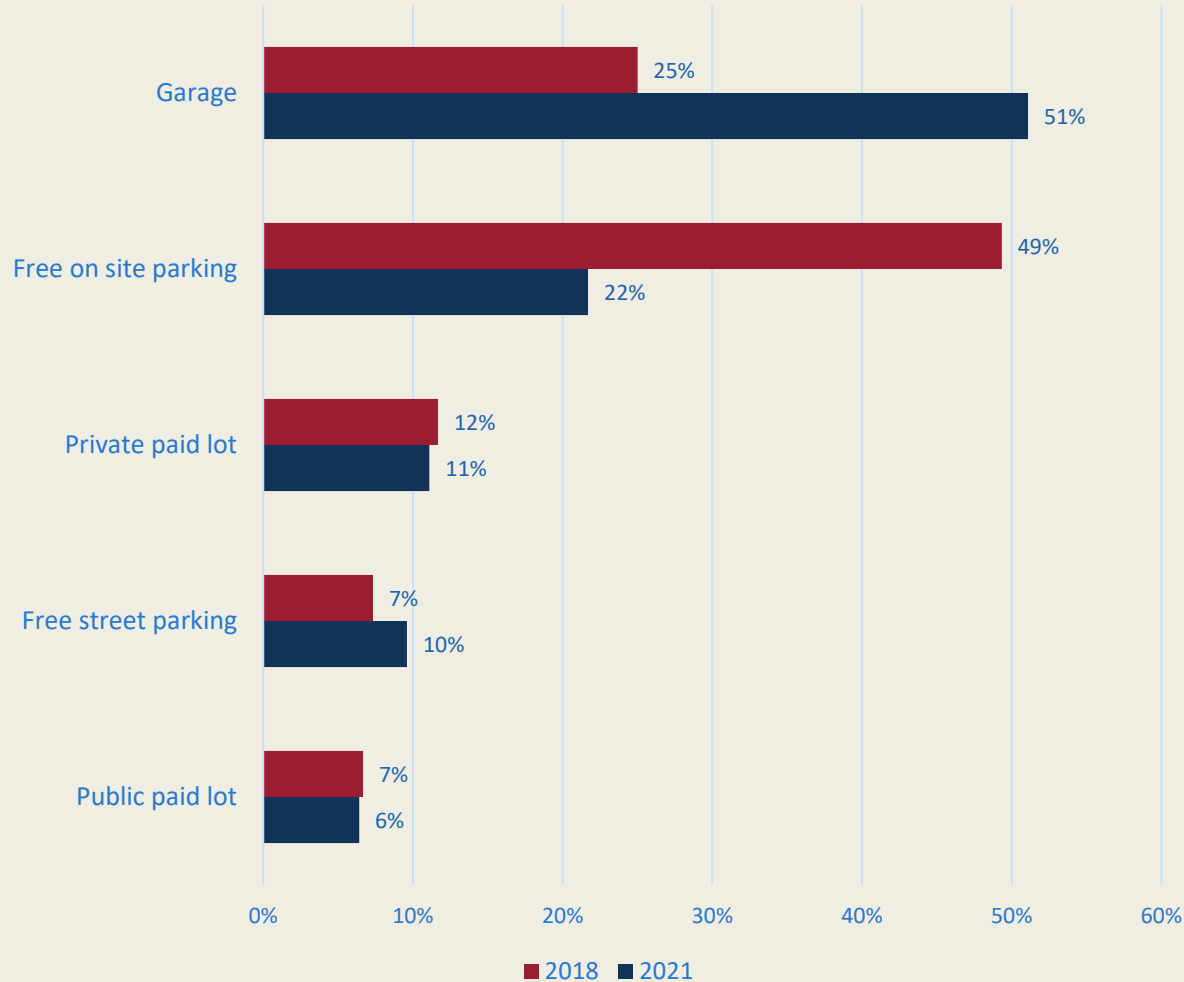
Do you foresee your employer to offer work from home in some capacity in the future?
(Base: Those working from home)



Parking

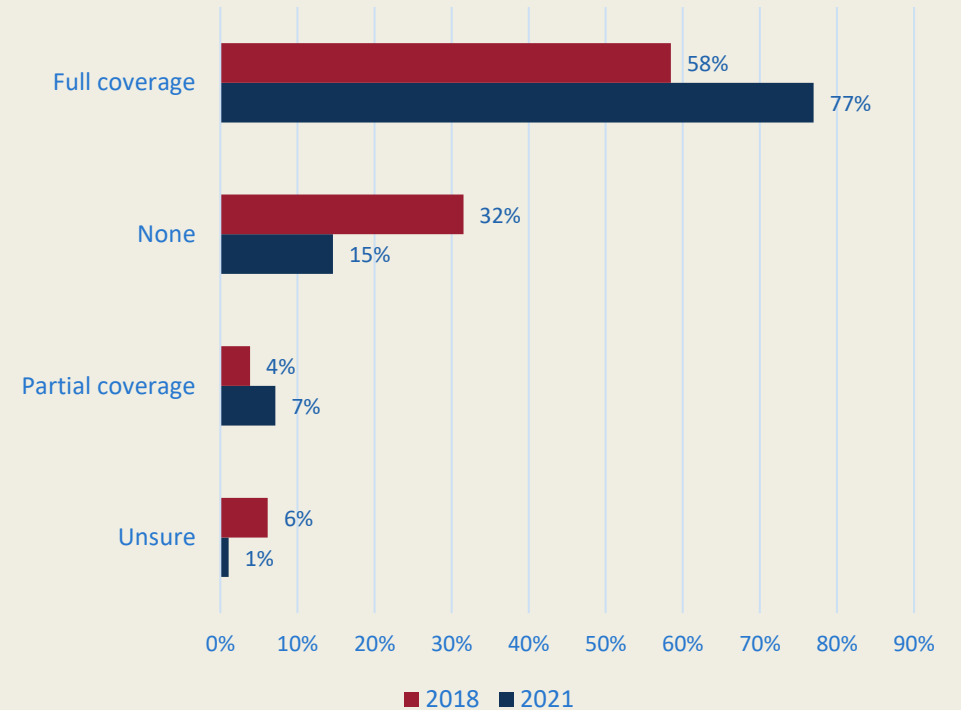


Where do you typically park?



- On average, the 22% of workers who pay for their parking pay \$164.97 per month

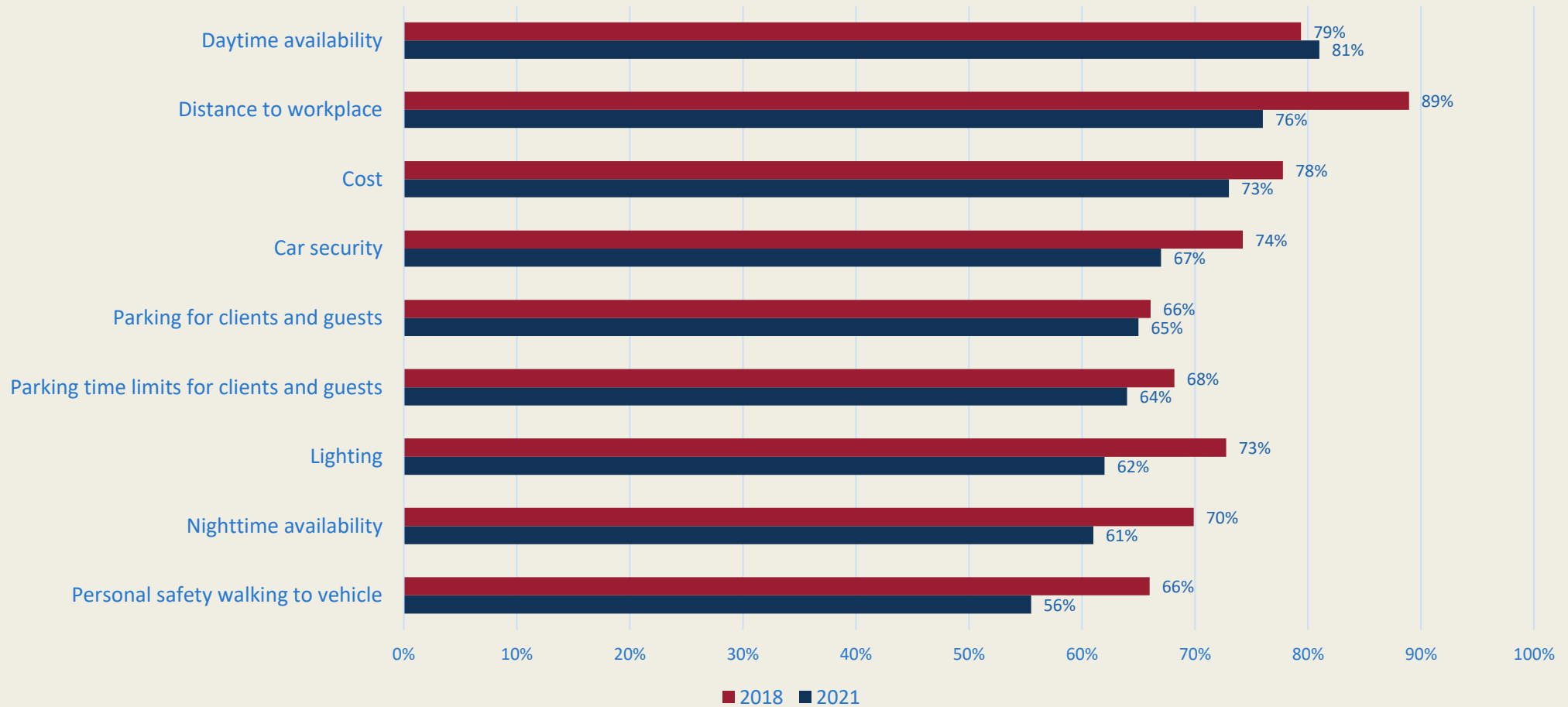
Does your work offer a parking subsidy?



Parking (Cont'd)



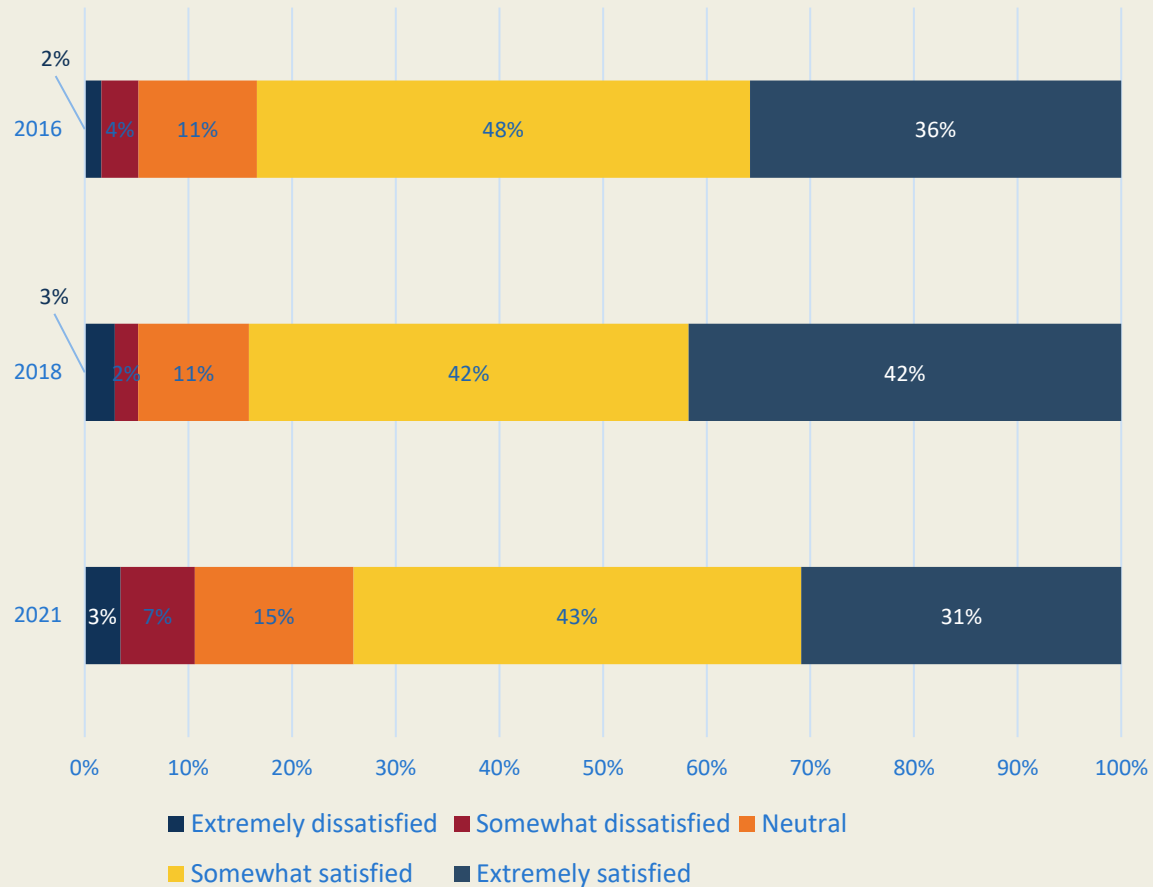
How satisfied are you with the following aspects of parking?
“Completely satisfied” and “Somewhat satisfied”



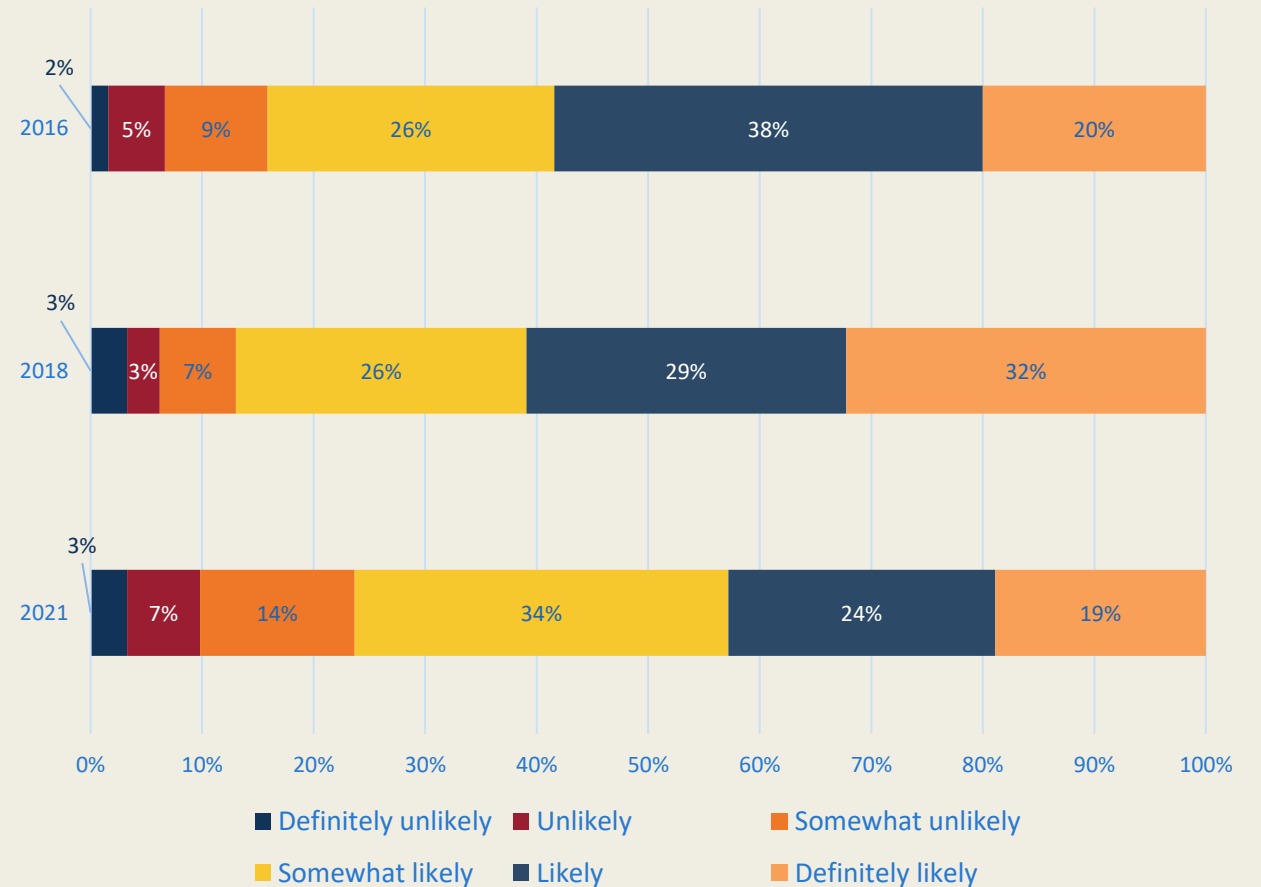
Satisfaction and Recommending Working in Ybor



In general, how satisfied are you with working in Ybor City?



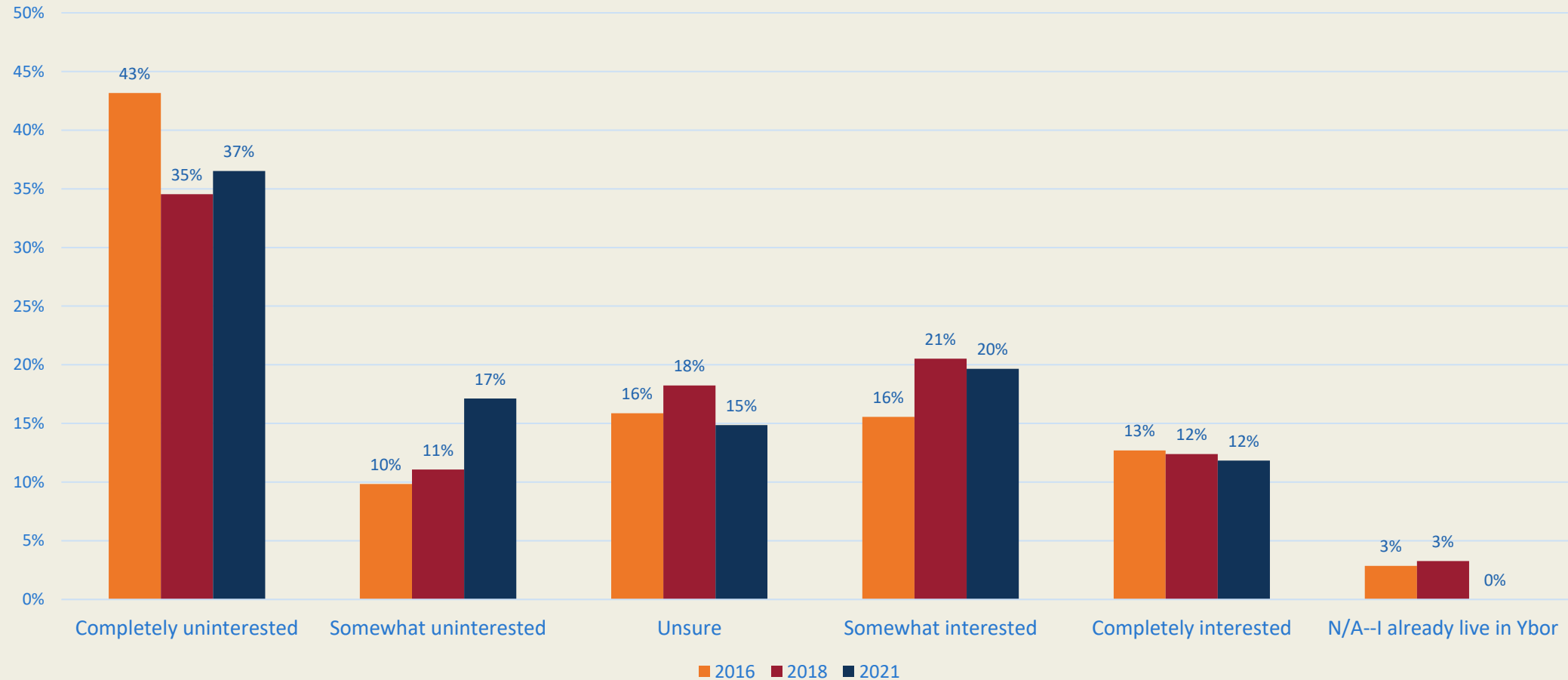
How likely are you to recommend Ybor City to a friend or peer as a place to work?



Relocating to Ybor within Five Years



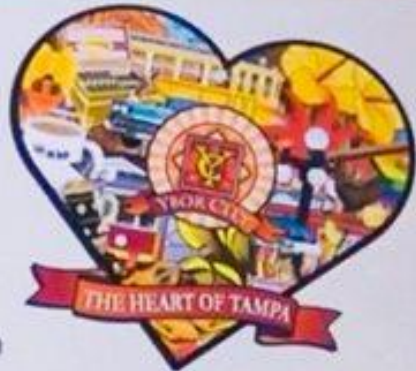
How interested are you in living in Ybor City within the next five years?





DO YOU LIVE OR
WORK IN YBOR?

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Ybor City Development Corporation
through an online survey, which
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yborcityonline.com/survey

Please spread the word!

Survey participants can enter for a

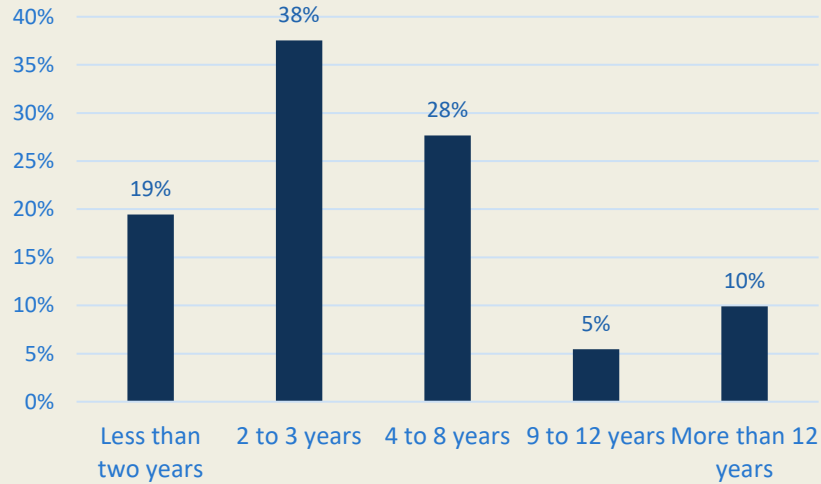


Residents

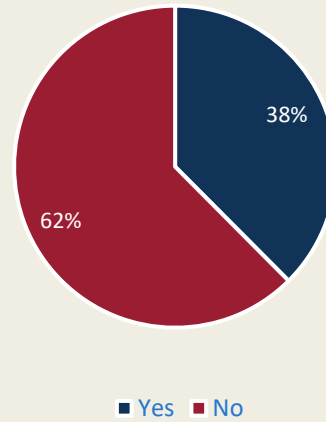


Demographics

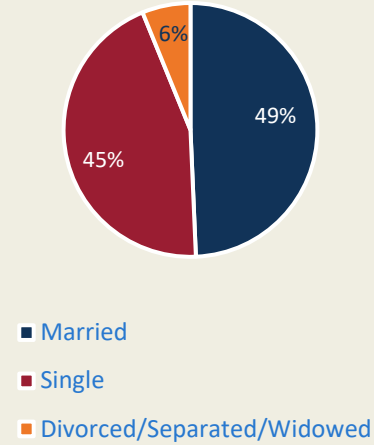
How long have you lived in Ybor City?



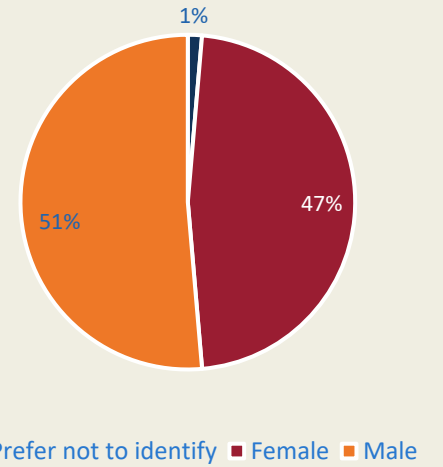
Children in Household



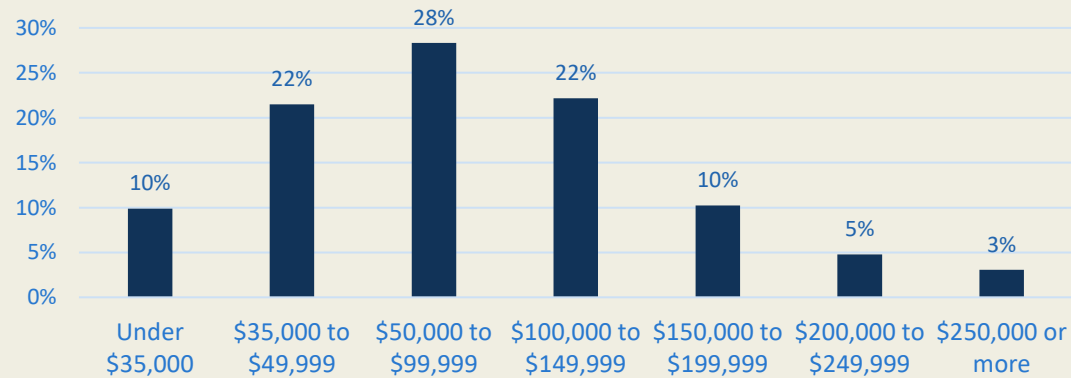
Marital Status



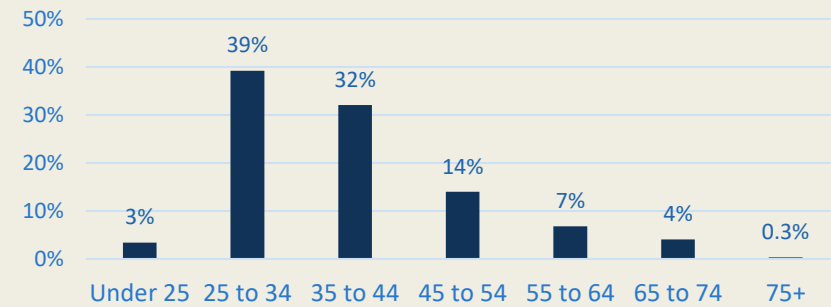
Gender



Annual Household Income Range



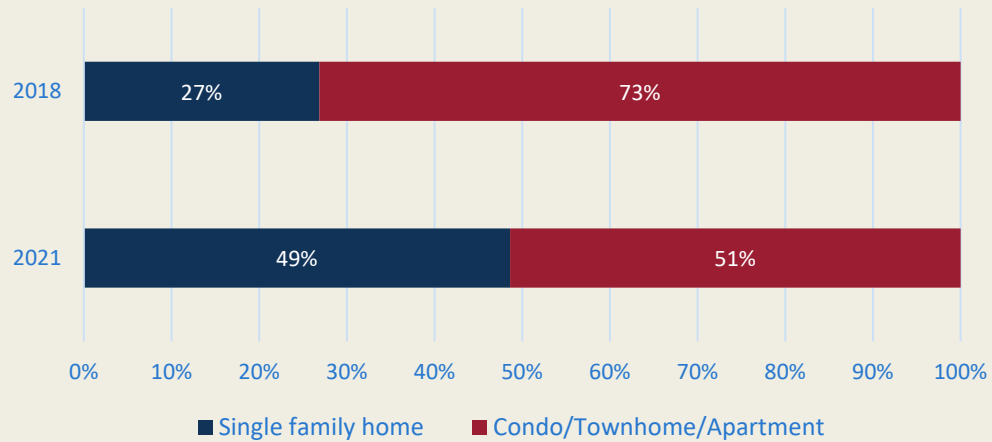
Age Range



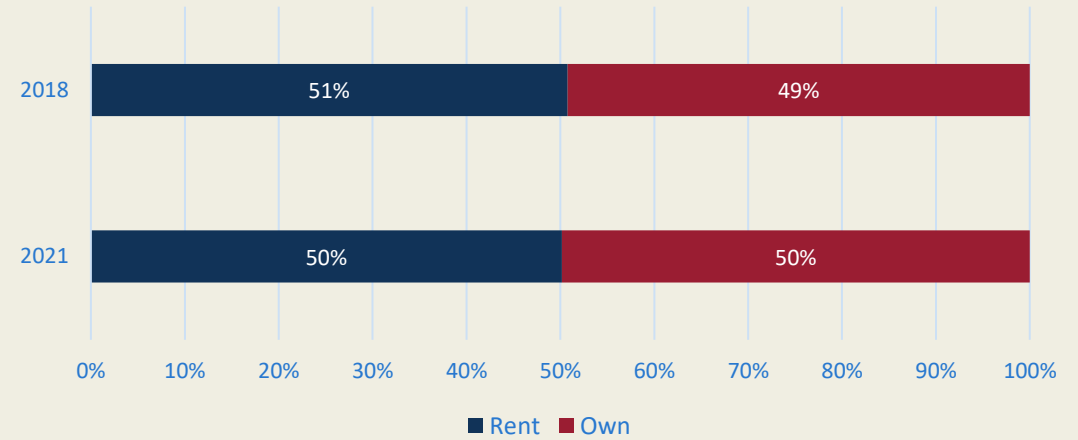


Resident Information

What best describes your residence?

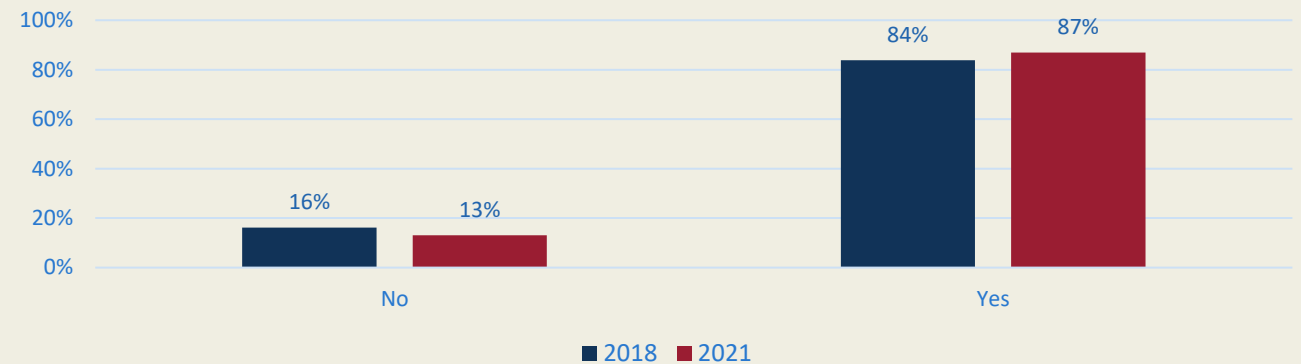


Do you rent or own your residence?



An average reasonable monthly mortgage for respondents is \$2,418.09

Do you have an interest in owning a residence in Ybor?
(Base: Those that rent in Ybor)





Importance to You as an Ybor Resident

On a scale from 1 to 10 where 1 is 'extremely unimportant' and 10 is 'extremely important,' how important are each of the following to you, as an Ybor resident?	2016	2018	2021	Δ
Walkable city	9.25	9.12	7.93	↓
Strong sense of personal safety	9.16	9.02	7.78	↓
Public area cleanliness	-	8.90	7.67	↓
Quality housing options	8.49	8.42	7.47	↓
Things to do	8.74	8.52	7.42	↓
Diversity in food/beverage options	8.61	8.51	7.41	↓
Sense of community	-	8.36	7.37	↓
Car-free transportation options	-	-	7.26	
Diversity in shopping/retail options	8.20	7.84	7.06	↓
Incoming/outgoing traffic flow	8.10	7.87	6.96	↓
Festivals and events	8.02	7.85	6.88	↓
Affordable housing options	7.77	7.53	6.83	↓
In-town traffic circulation	7.97	7.75	6.76	↓
Good parking accessibility	7.55	7.62	6.74	↓
Art-filled streetscapes	7.31	7.29	6.59	↓
Affordable parking	7.11	7.23	6.48	↓



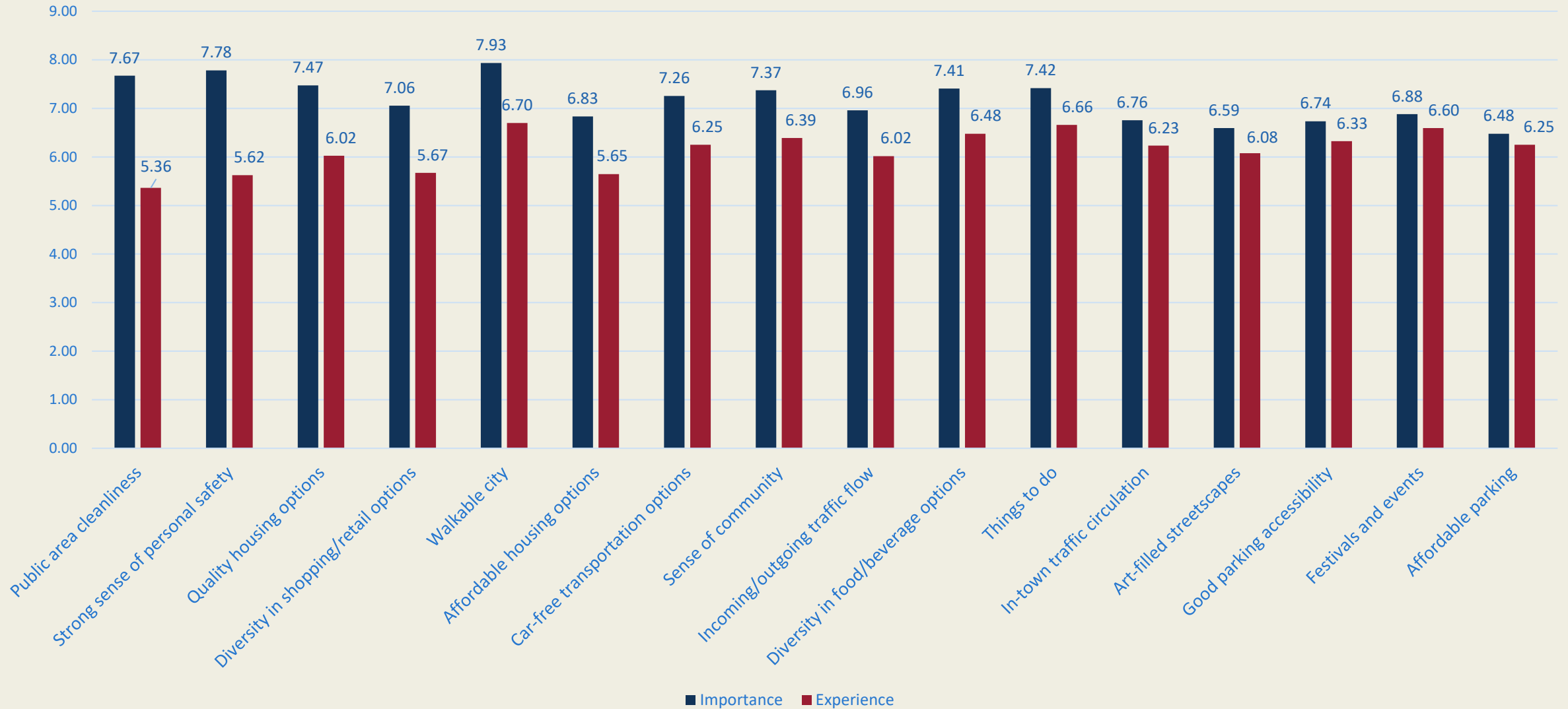
Experience as an Ybor Resident

On a scale from 1 to 10 where 1 is 'extremely dissatisfied' and 10 is 'extremely satisfied,' how satisfied are you with your experience as a resident, with each of the following?	2016	2018	2021	Δ
Walkable city	7.30	7.48	6.70	↓
Things to do	7.41	7.17	6.66	↓
Festivals and events	7.59	7.33	6.60	↓
Diversity in food/beverage options	6.72	6.62	6.48	↓
Sense of community	-	6.99	6.39	↓
Good parking accessibility	6.61	6.67	6.33	↓
Car-free transportation options	-	-	6.25	↓
Affordable parking	6.56	6.62	6.25	
In-town traffic circulation	5.38	6.41	6.23	↓
Art-filled streetscapes	6.29	6.34	6.08	↓
Quality housing options	6.21	6.18	6.02	↓
Incoming/outgoing traffic flow	5.01	6.44	6.02	↓
Diversity in shopping/retail options	5.46	5.55	5.67	↑
Affordable housing options	6.17	6.02	5.65	↓
Strong sense of personal safety	5.70	6.11	5.62	↓
Public area cleanliness	-	6.14	5.36	↓

Expectation Gap



Expectation Gap





Expectation Gap Trending

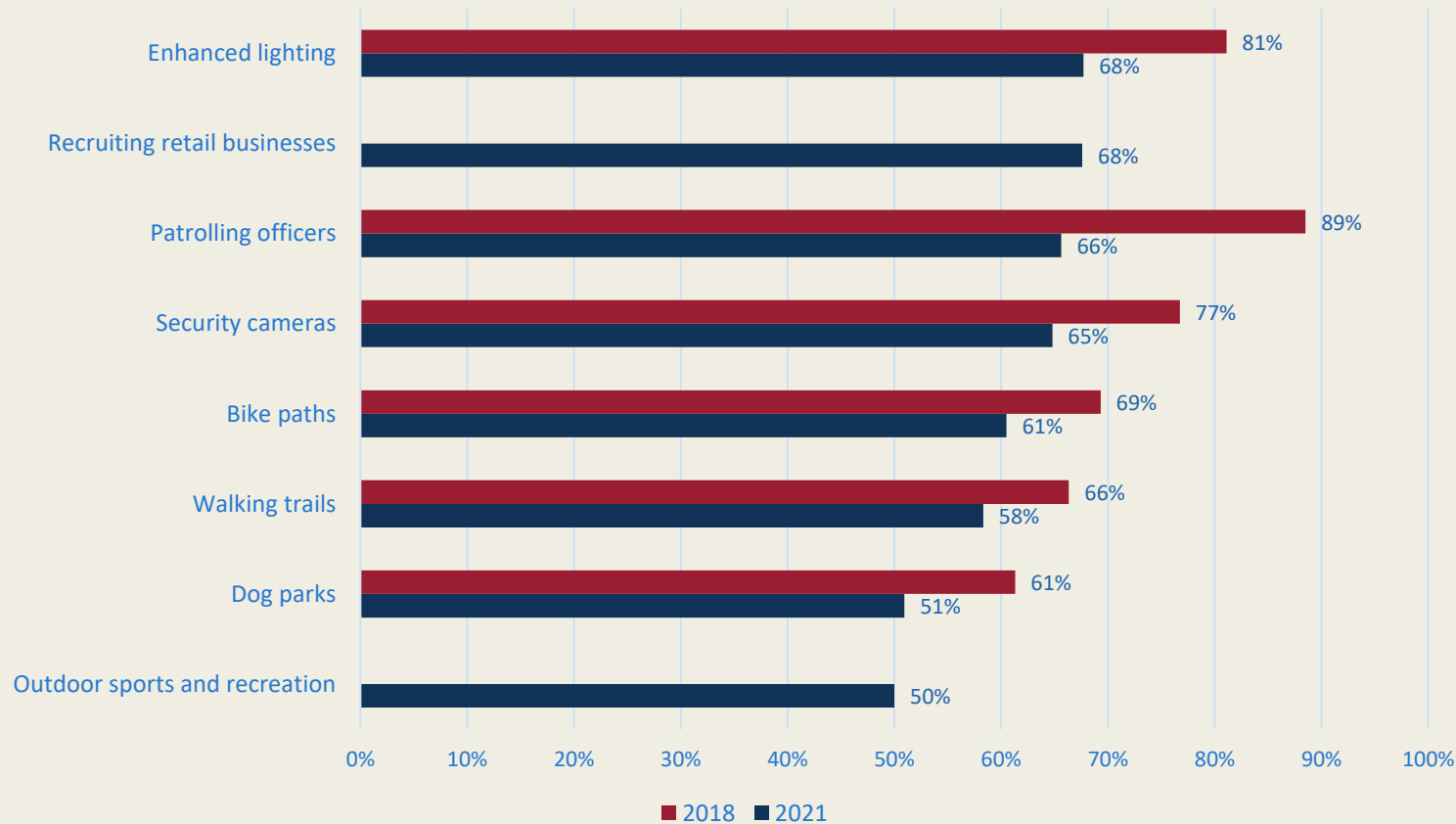
Top Resident Expectation Gaps: Trending					
2016 Top 5 Gaps		2018 Top 5 Gaps		2021 Top 5 Gaps	
Strong sense of personal safety	3.46	Strong sense of personal safety	2.92	Public area cleanliness	2.31
Incoming/outgoing traffic flow	3.09	Public area cleanliness	2.76	Strong sense of personal safety	2.16
Diversity in shopping/retail options	2.75	Diversity in shopping/retail options	2.29	Quality housing options	1.45
In-town traffic circulation	2.59	Quality housing options	2.24	Diversity in shopping/retail options	1.38
Quality housing options	2.28	Diversity in food/beverage options	1.89	Walkable city	1.23



Level of Priority

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

'Very high priority' and 'High priority'



Respondents stated priority should be placed on 'Other,' which can be summarized by the following categories:

- Controlling noise
- Safety
- More shade



Retail Recruitment

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

- Residents were most interested in grocery options
- Specific stores such as Publix and Trader Joes were called out, with drug stores such as CVS also named



How Often do You Leave Ybor? Trending

In a typical 30 days, how often do you leave Ybor City for any of the following, during the workday?
Leaves Ybor at some frequency in 30 days

	2018	2021
Grocery stores	99%	98%
Pharmacies/Drug stores	94%	95%
Casual dining restaurants	92%	94%
Fine dining restaurants	86%	91%
Clothing stores/Boutiques	90%	91%
Convenience stores	64%	80%
Home furnishing stores	54%	79%
Hair/Nail salon	65%	78%
Coffee shops/Cafes	65%	76%
Book/Music stores	50%	72%
Health clubs/Gyms	54%	71%
Electronics stores	47%	70%
Dry cleaners	55%	67%
Florists	26%	65%
Laundromats	13%	48%

*Categories highlighted have increased from 2018

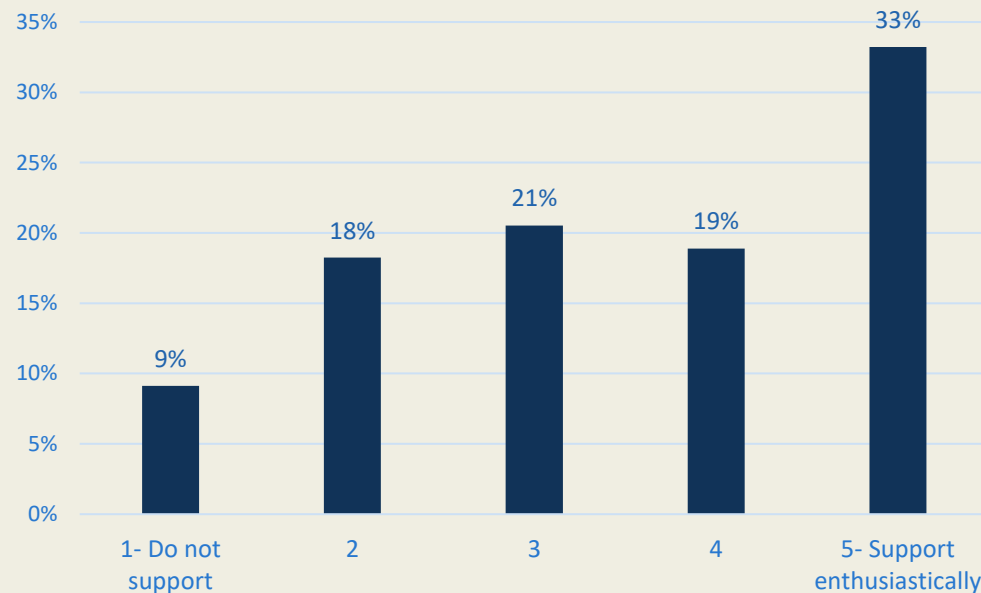


7th Avenue Rebricking

In the past, 7th Avenue was a brick road. As part of the strategy to reinstate an element of historical character of Ybor City, the community has asked the City of Tampa to consider rebricking 7th Avenue from Nuccio Parkway to 26th Street.

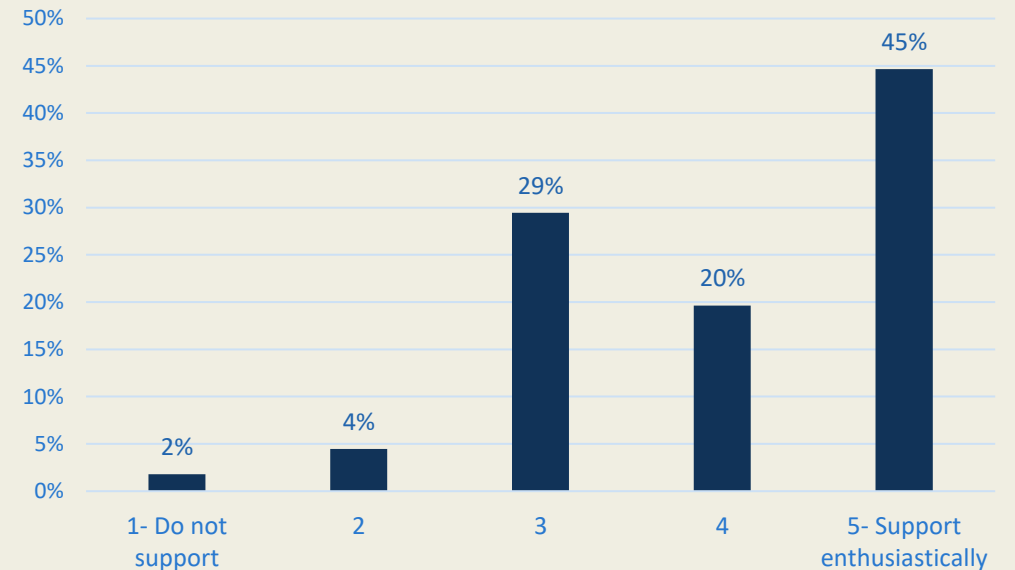
To facilitate rebricking 7th Avenue, certain blocks would be closed to vehicular traffic in phases for approximately 30 to 60 days, while sidewalks would remain open to pedestrians.

Rate how you feel about this on the scale below where one is 'do not support' and five is 'support enthusiastically.'



In light of this, rate your level of support for the rebricking of 7th Avenue where one is 'do not support' and five is 'support enthusiastically.'

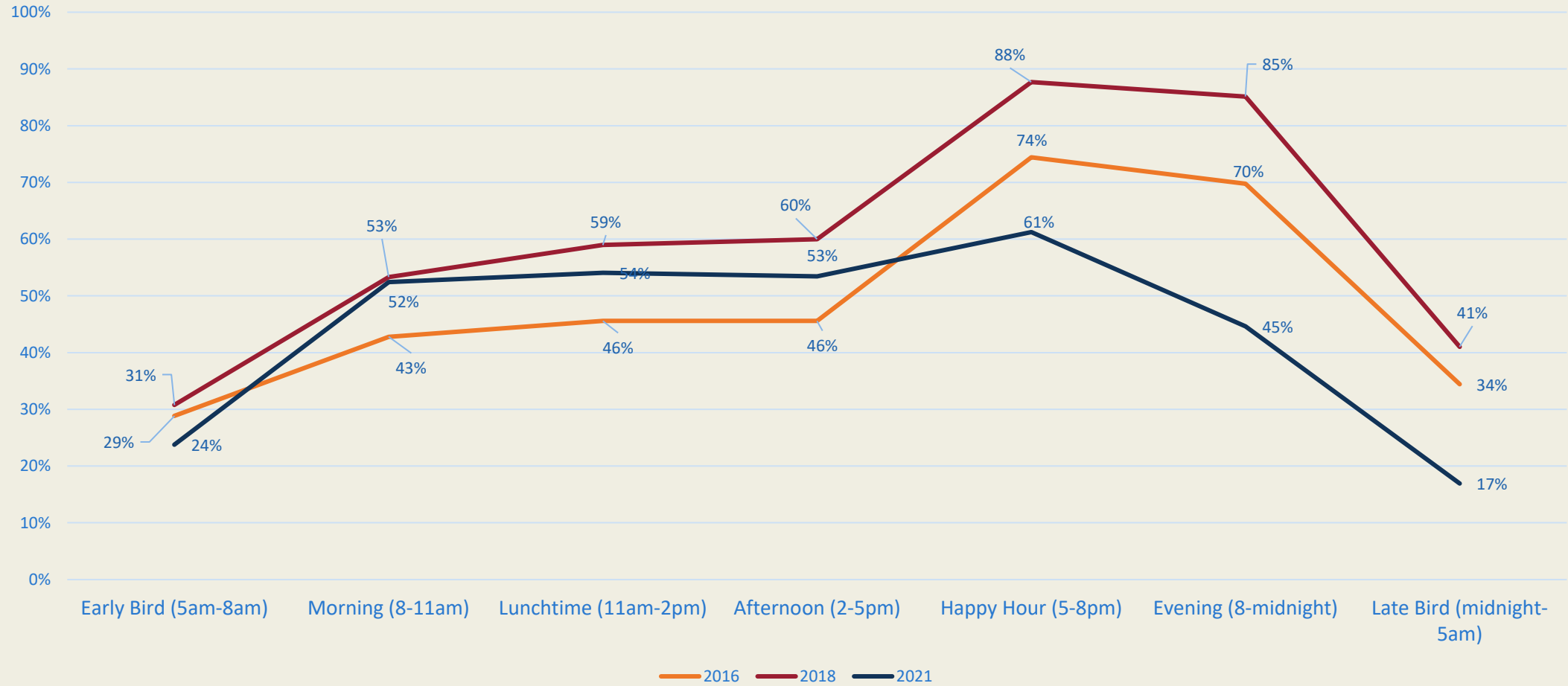
(Base: Those that rated 3, 4, or 5 on previous question)





Time Spent in District

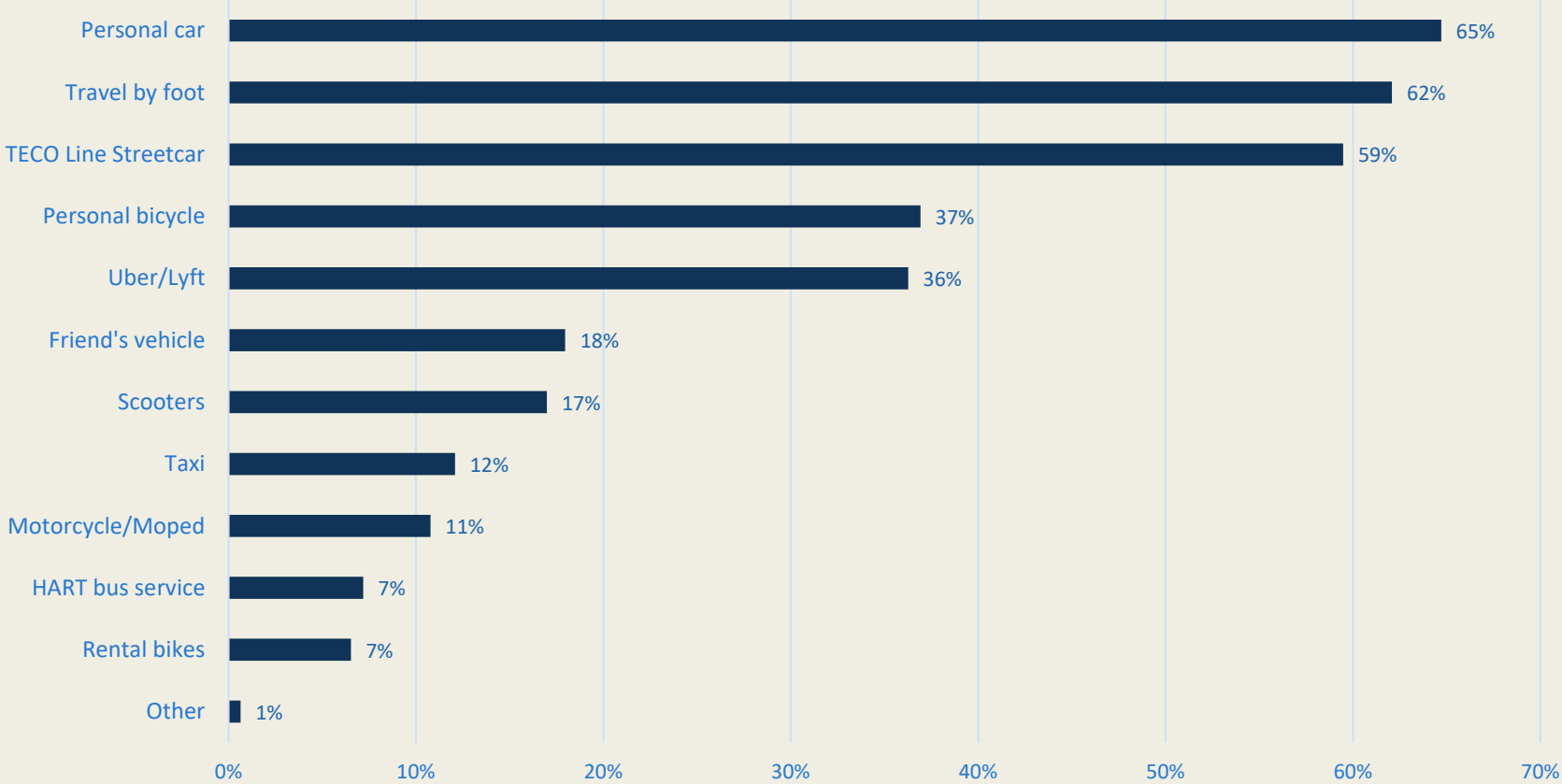
Select the typical time ranges that you are awake and actively spending time in Ybor City. Select all that apply.





Modes of Transportation

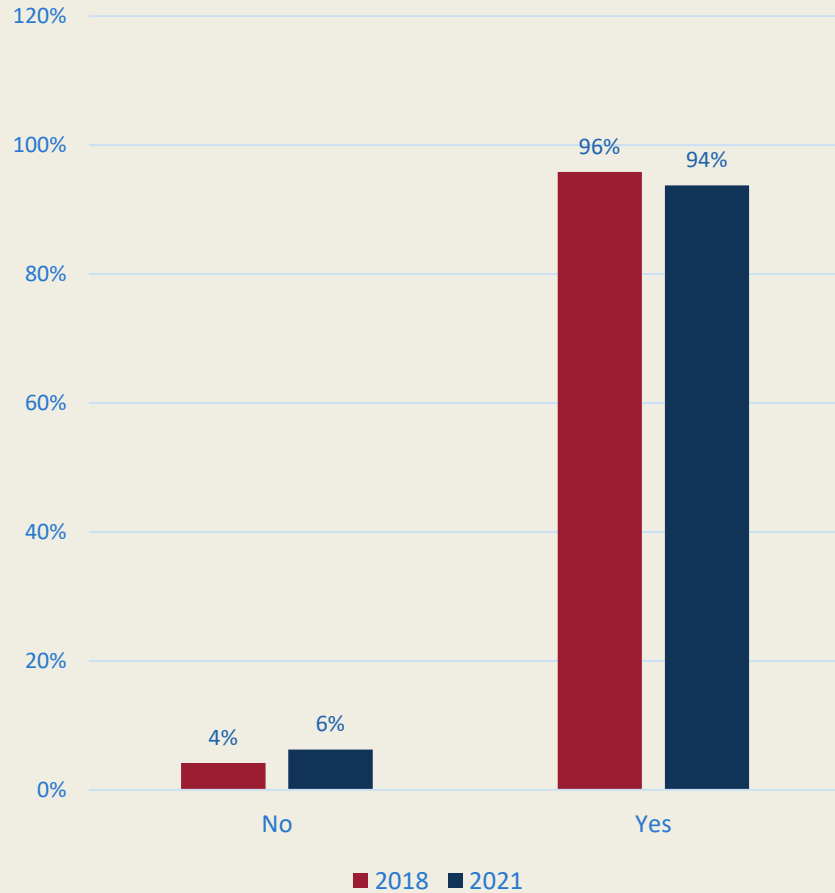
Do you use any of the following modes in Ybor City? Select all that apply.



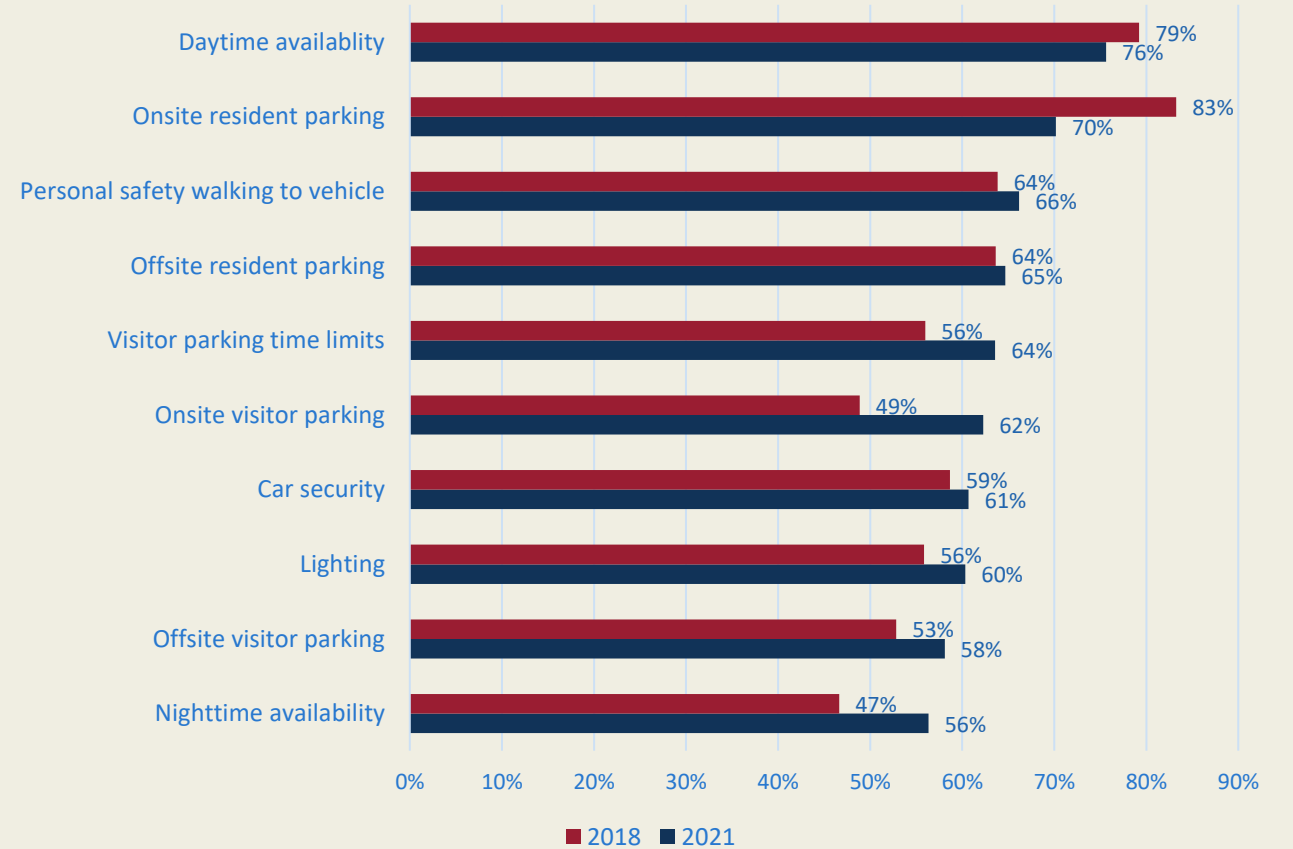


Car and Parking

Do you have a car?

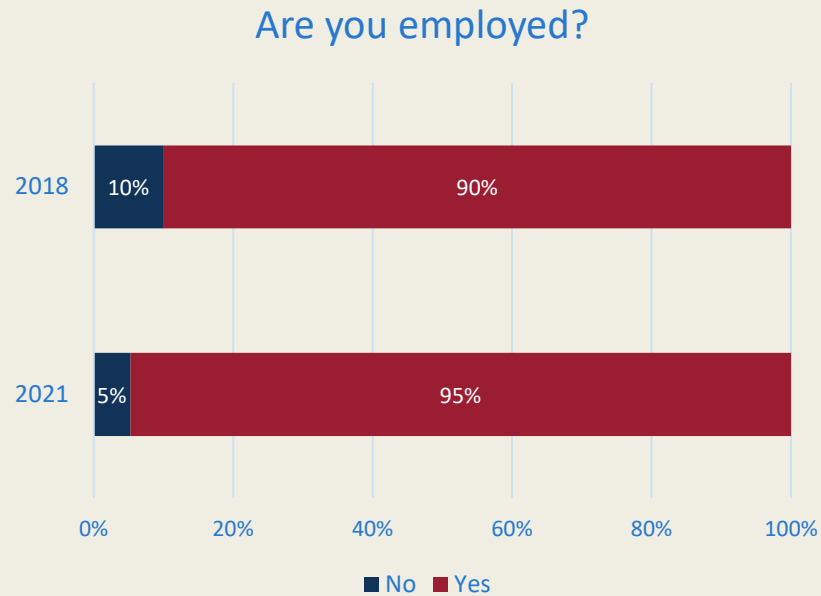


How satisfied are you with the following aspects of parking? 'Completely satisfied' and 'Somewhat satisfied'

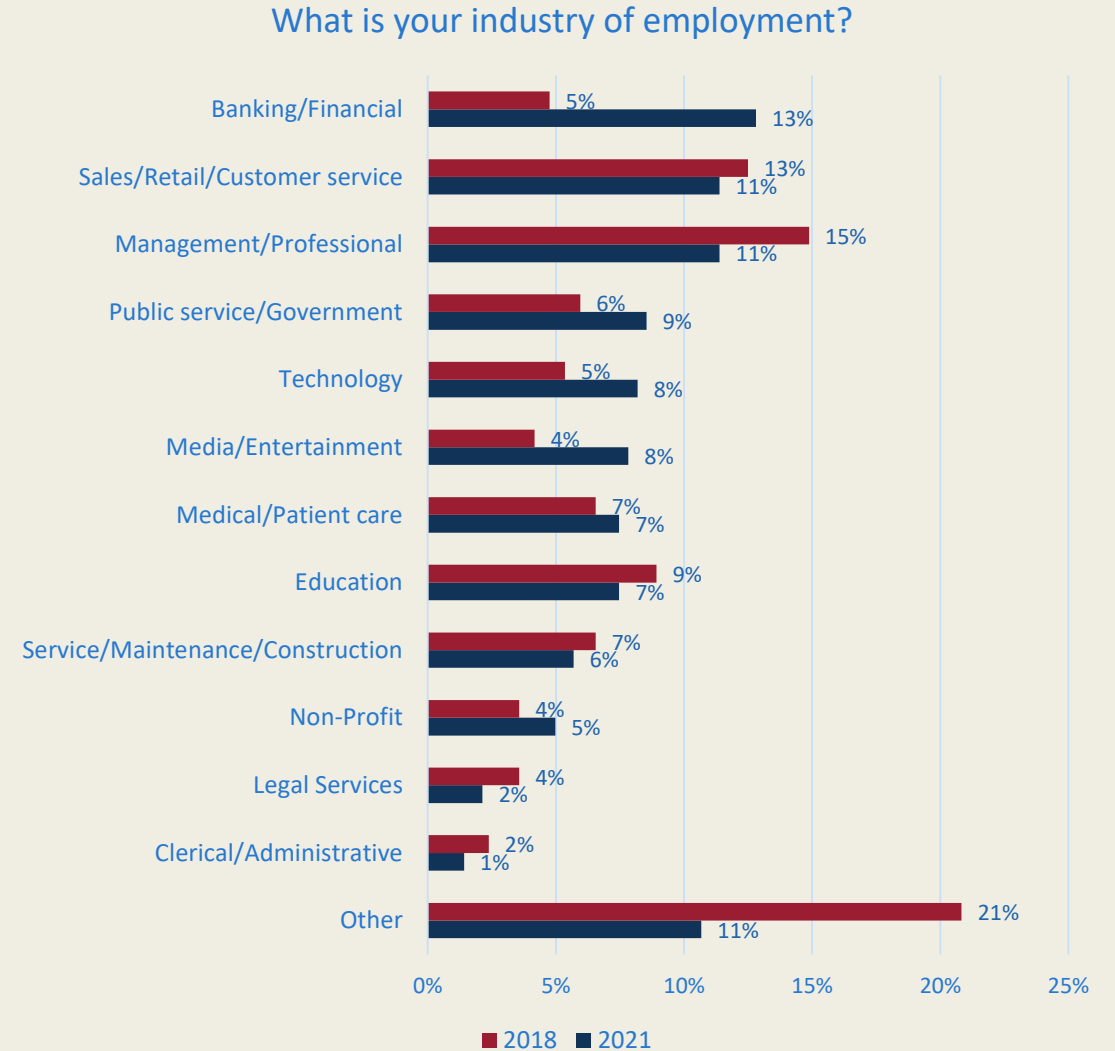




Employment

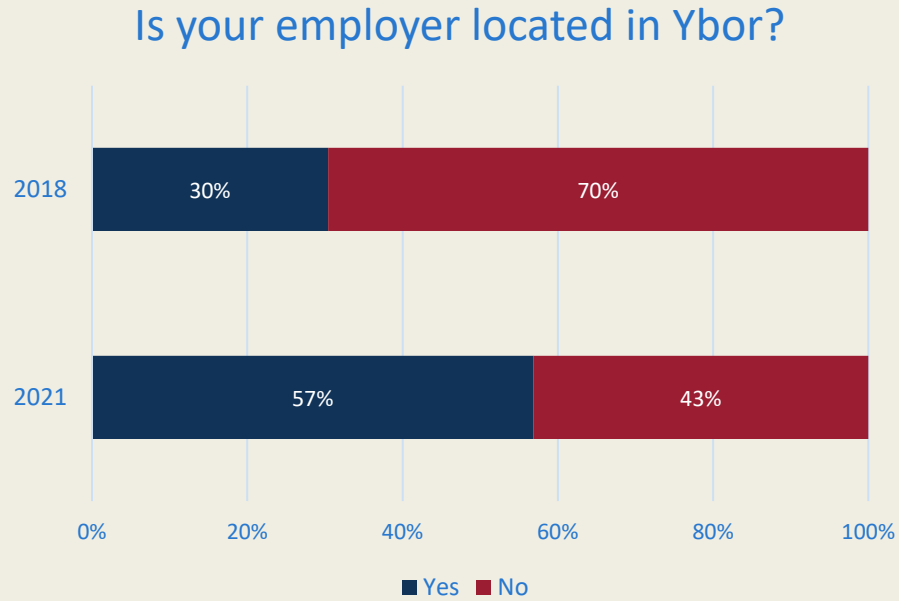


Other includes professions primarily in the following industries:
Hospitality, marketing, and real estate

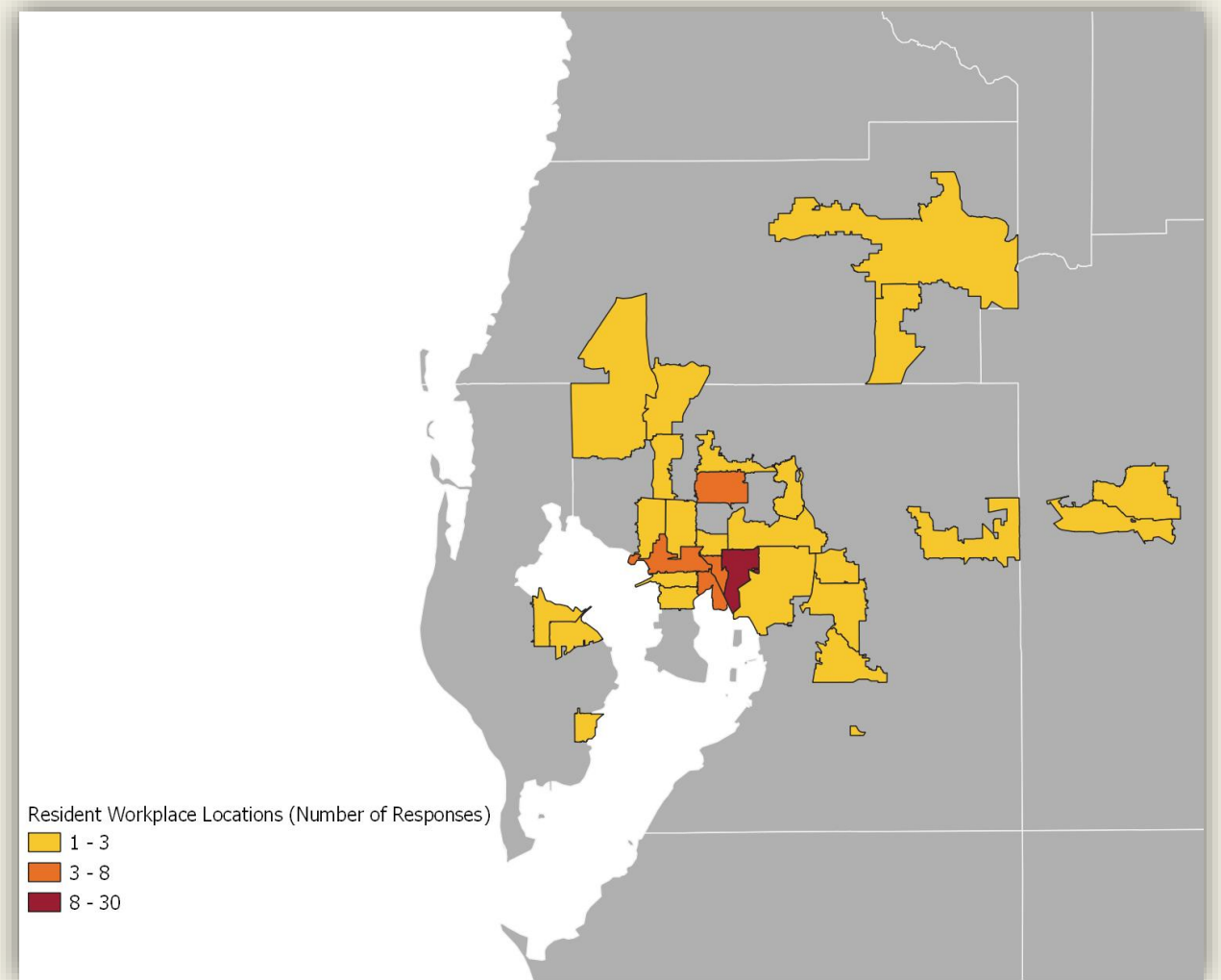




Employer Location



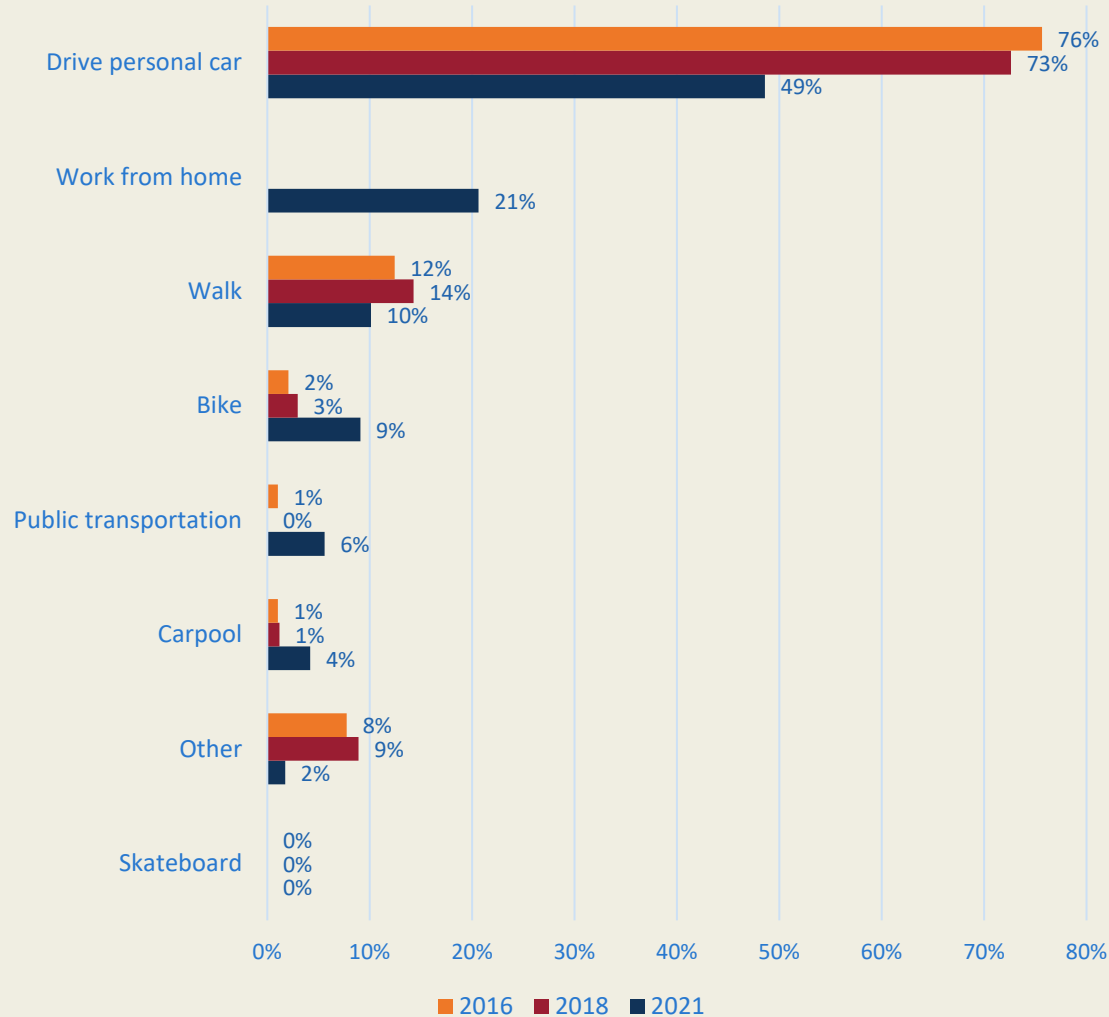
- Increasing numbers of residents work in Ybor City



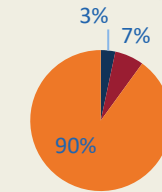


Commute to Work

How do you normally commute to work?

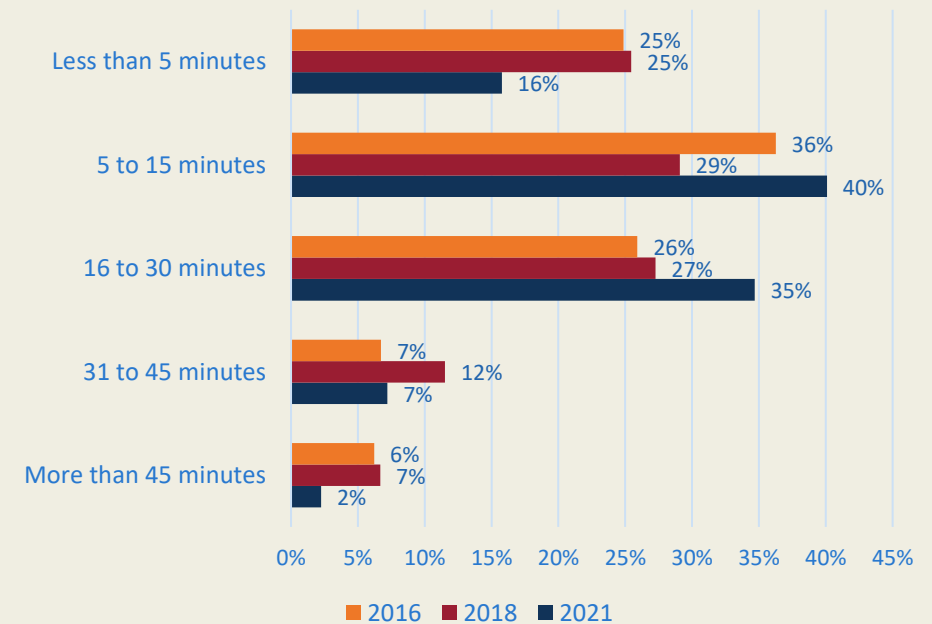


Do you foresee your employer offering work from home in some capacity in the future? (Base: Those working from home)



■ No ■ Not sure ■ Yes

How long is your commute to work?





Motivations to Live in Ybor

Respondents were asked to rank a series of factors on how important or not important each were in their motivations to move to Ybor City.

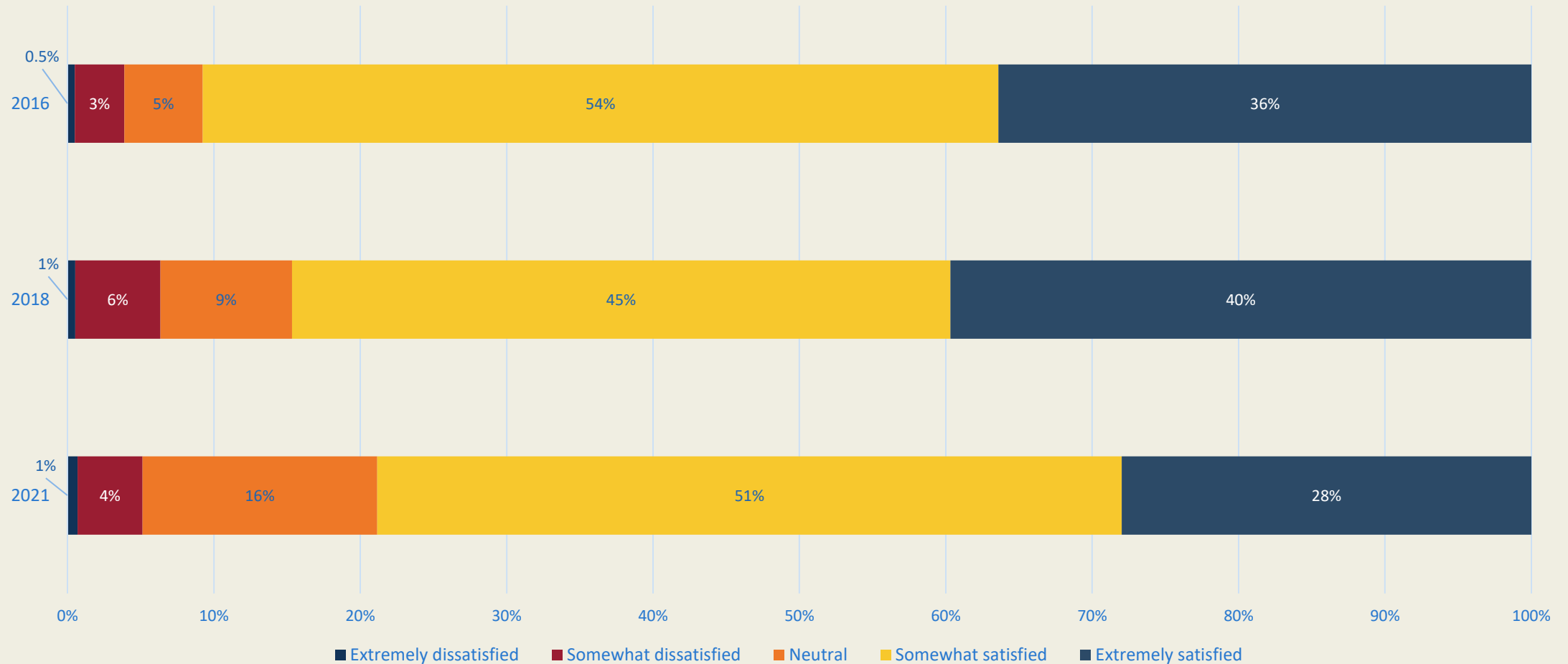
Most Important Motivating Factors					
2016		2018		2021	
Experience the urban lifestyle	21%	Experience the urban lifestyle	13%	Restaurants	16%
Arts/Entertainment	10%	Affordability	10%	Arts/Entertainment	11%
Proximity to family and friends	10%	Arts/Entertainment	10%	Close proximity to work	10%

Least Important Motivating Factors					
2016		2018		2021	
Affordability	12%	Security/Safety	14%	Security/Safety	15%
Security/Safety	12%	Public transportation options	10%	Close proximity to work	14%
Proximity to family and friends	11%	Affordability	10%	Investment opportunity	14%



Satisfaction Living in Ybor

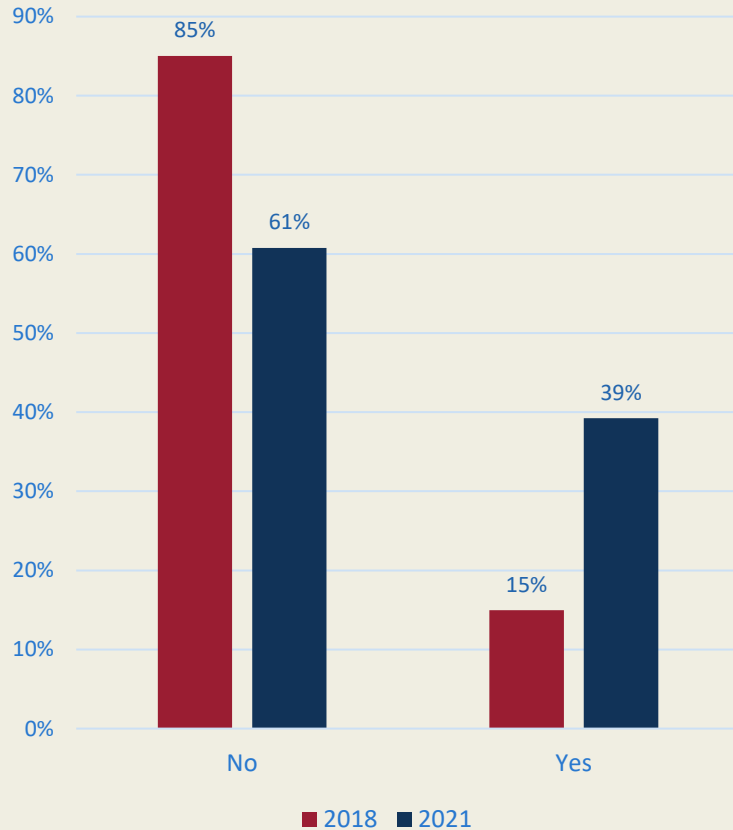
In general, how satisfied are you with living in Ybor City?





Business Owners

Are you a business owner in Ybor City?



Do you have any feedback regarding your experience as a business owner in Ybor to share with the City?

Resident business owners shared that:

- There should be more synergy and collaboration
- Safety is a major concern
- YCDC should be given the resources they need to make improvements
- Cleanliness is also a major concern

What ideas do you have to activate Ybor City in a post COVID-19 world?

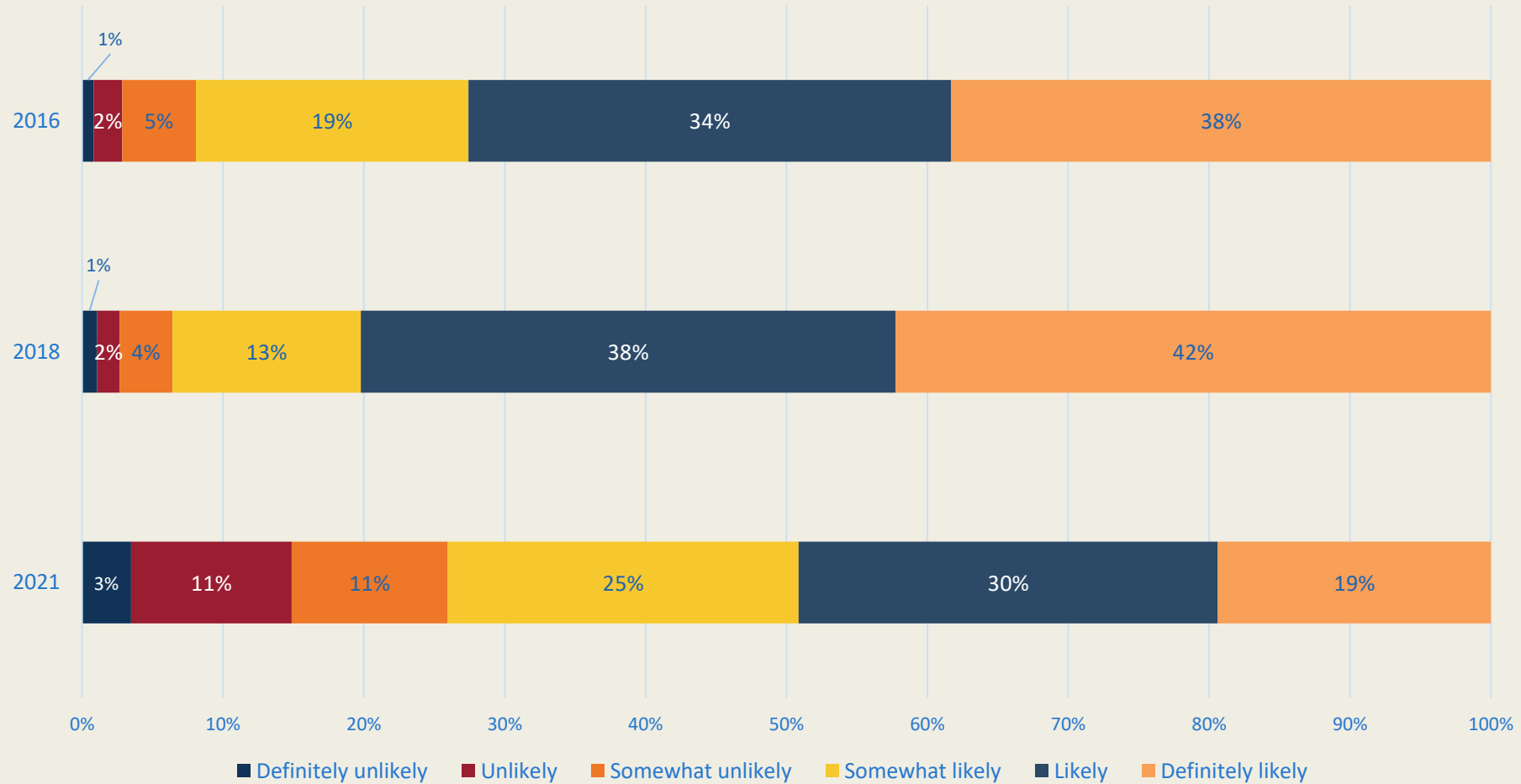
Residents provided ideas such as:

- Seek new developments and business
- Promote the revival of all enterprises
- Unite businesses through merchant associations that would promote Ybor as a whole
- More outdoor experiences and events
- Incentivize residents to visit Ybor businesses



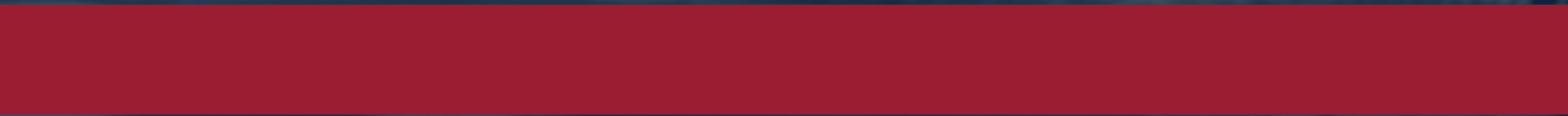
Recommending Ybor as a Place to Live

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





Summary Findings



Summary Findings

- Workers and Residents agree that **Ybor's culture, history, and diversity** are its greatest strengths
 - Both groups are supportive of rebricking 7th Avenue
- **Safety remains a top priority** for both residents and workers
 - Most open-ended feedback correlated homelessness, littering, and safety together
- **Cleanliness** has overtaken parking-related concerns as a **high priority** for the district
- **Residents are less active** in Ybor than years prior – likely as a result of COVID
- Residents and workers are less interested in retail and boutiques; workers want more fast- and fast-casual food options, while residents want more grocery options
- Both residents and workers recommend Ybor less and have lower satisfaction levels than years prior; despite the decreased sentiments, the open-ended question about the future vision for Ybor shows hopefulness

Summary Findings (Cont'd)

- More residents both live and work in Ybor – a promising sign for the district's future growth as a mixed-use district
- More residents and workers are using the streetcar on a regular basis
- Use of the parking garage has increased – a trend that we should expect to continue as more development takes place in the district
- Residents and workers want to see greater activation of Ybor City
 - More events, especially outside events
 - Many respondents suggested closing 7th Avenue to host block parties, street fairs, and other events more often



Thank You!