Resident & Worker Data

YBOR CITY

Methodology

Process

- Collaborated with YCDC management to develop survey questionnaires for residents and workers
- Selected an online surveying methodology
- Coded the questions into online survey platform

Timeline

- Surveys remained open for two weeks

Outreach

- Publicized the survey through the YCDC board, direct outreach to businesses and homeownership/residential groups, social media, eblasts

Responses

- 309 residents
- 404 workers

Residents
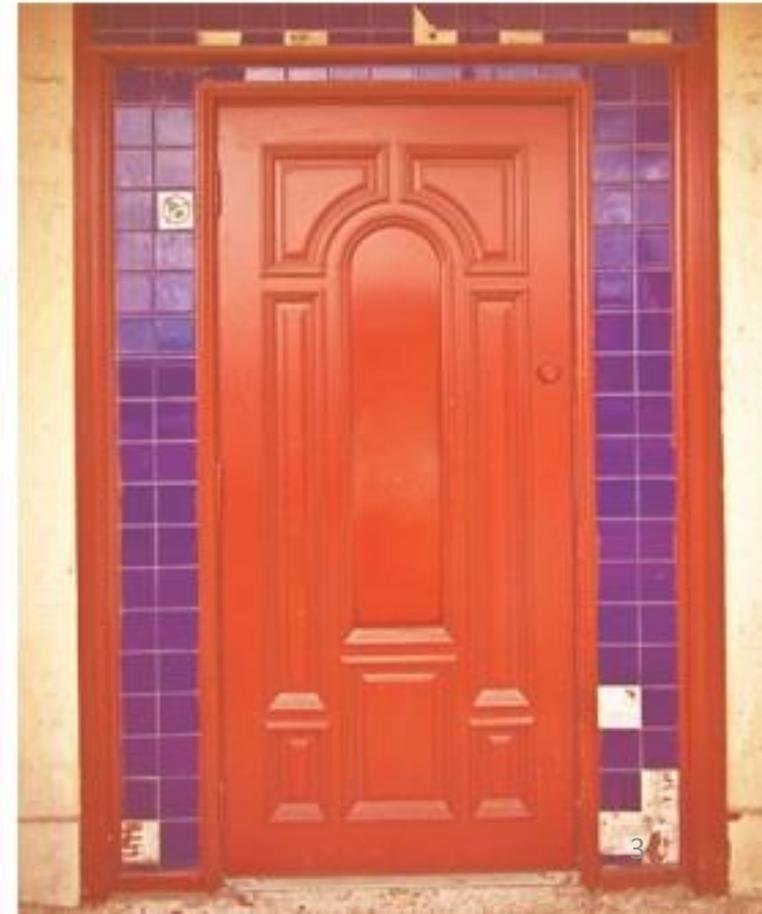
Resident - Demographics

Ybor residents tend to skew younger *(more 25-44),* more affluent *(more $50k+)* and fewer report presence of children, than Tampa residents.

	Ybor City	Tampa Census
Gender		
Male	48.8%	48.9%
Female	51.2%	51.2%
Age		
Under 25	2.9%	11.0%
25 to 34	34.8%	22.0%
35 to 44	30.9%	18.2%
45 to 54	17.9%	19.2%
55 to 64	9.7%	14.7%
65+	3.9%	15.3%
HHI		
Under $35,000	10.0%	41.5%
$35,000 to $49,999	22.4%	13.6%
$50,000 to $99,999	36.3%	24.7%
$100,000 to $149,999	17.9%	9.8%
$150,000 to $199,999	6.0%	4.6%
$200,000+	7.5%	5.8%

	Ybor City	Tampa Census
Marital Status		
Married	28.6%	33.9%
Single	60.2%	66.1%
Divorced/Separated/Widowed	11.2%	
Pets Present		
Dogs	44.7%	
Cats	30.6%	
Currently a student at UT, Saint Leo (Channel District), HCC (Ybor) or Stetson University (Tampa)?		
Yes	3.9%	12.8%*
No	96.1%	87.2%
Children in HHLD		
Yes	10.8%	27.9%
No	89.2%	72.1%

*Enrolled in any college or graduate program

Resident Quality of Life
—Most Important & Satisfied Expectations

Most Important:

Walkability

Sense of personal safety

Things to do

Most Satisfied:

Festivals and events

Things to do

Walkability

Resident Quality of Life —Largest & Smallest Gaps In Expectations

Largest Expectation Gaps:

- Incoming/outgoing traffic flow
- Sense of personal safety
- Diversity in shopping/retail options

Smallest Expectation Gaps:

- Festivals and events
- Affordable parking
- Parking accessibility

Resident - Quality of Life

Respondents shared the areas most important to them and then how satisfied they were with their experience with each as a resident of Ybor.
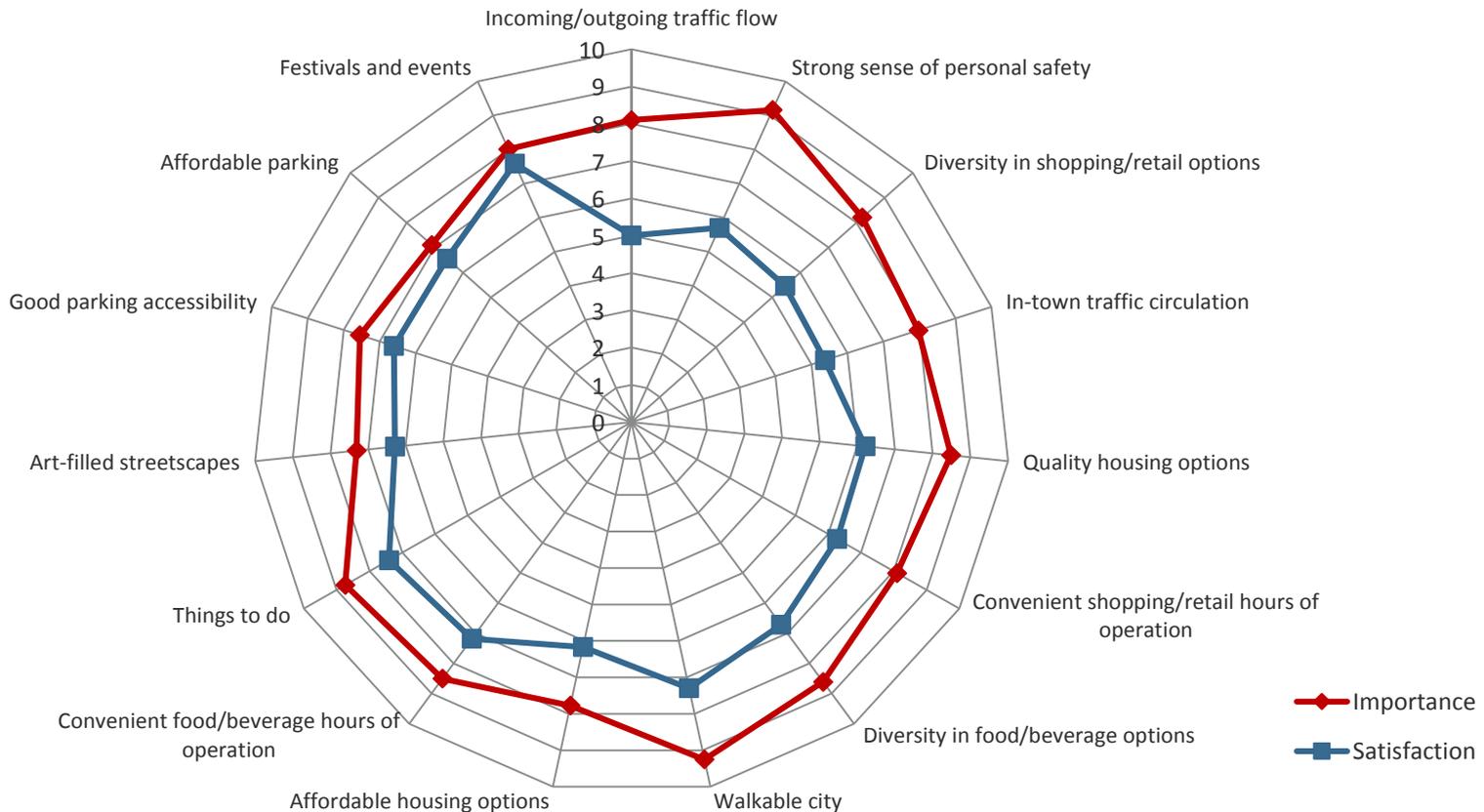
Resident - Sentiments

9 in 10 residents are:

- Satisfied with living in Ybor City
- Likely to recommend Ybor as a place to live

Residents shared that the following would improve their satisfaction:

- Grocery store
- Greater sense of safety *(visible police presence, homeless, lighting)*
- More restaurants *(non-chain, non-tourist)*
- Shorter roadway construction timelines
- Reduce open lots
- Dog park
- More housing options
- Clean up streets

Satisfaction Living in Ybor

Extremely satisfied	36.4%
Somewhat satisfied	54.4%
Neutral	5.3%
Somewhat dissatisfied	3.4%
Extremely dissatisfied	0.5%

90.8%

3.9%

Likelihood of Recommending Ybor as Place to Live

|	
Definitely likely	34.8%
Likely	37.7%
Somewhat likely	20.8%
Somewhat unlikely	4.8%
Unlikely	1.0%
Definitely unlikely	1.0%

93.2%

6.8%
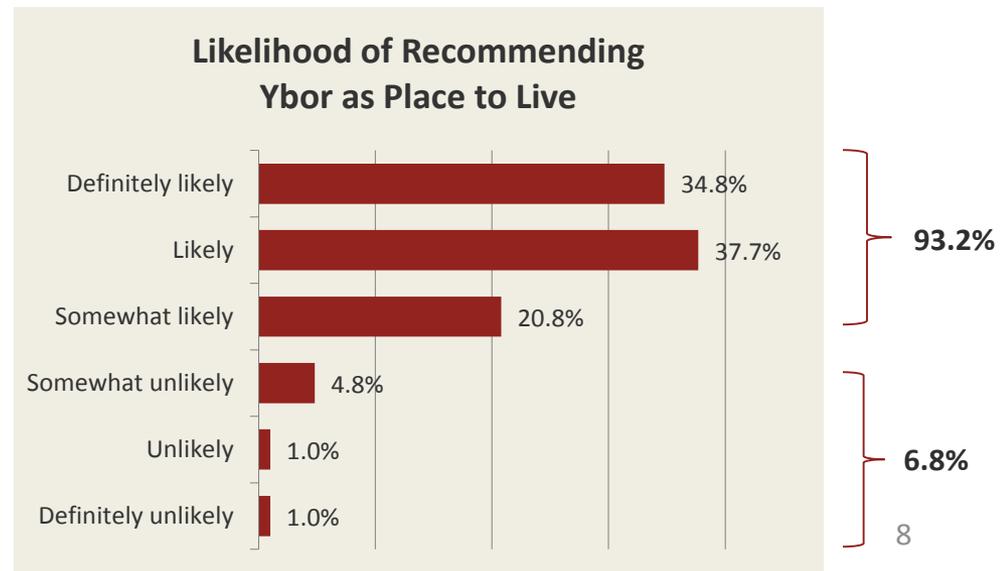
Resident - Priorities

Top priorities named by residents from those provided were:

- *Residential housing*
- *Events*
- *Bike paths*
- *Walking trails*

Resident Perceived Priorities for District

	Priority	Not a Priority	Unsure
Residential housing	82.3%	5.3%	12.4%
Events	80.4%	7.1%	12.4%
Bike paths	72.2%	13.7%	14.1%
Walking trails	61.9%	22.6%	15.5%
Dog parks	57.7%	21.6%	20.7%
Urgent care/physician services	51.1%	23.3%	25.6%
Playgrounds	27.9%	50.0%	22.1%
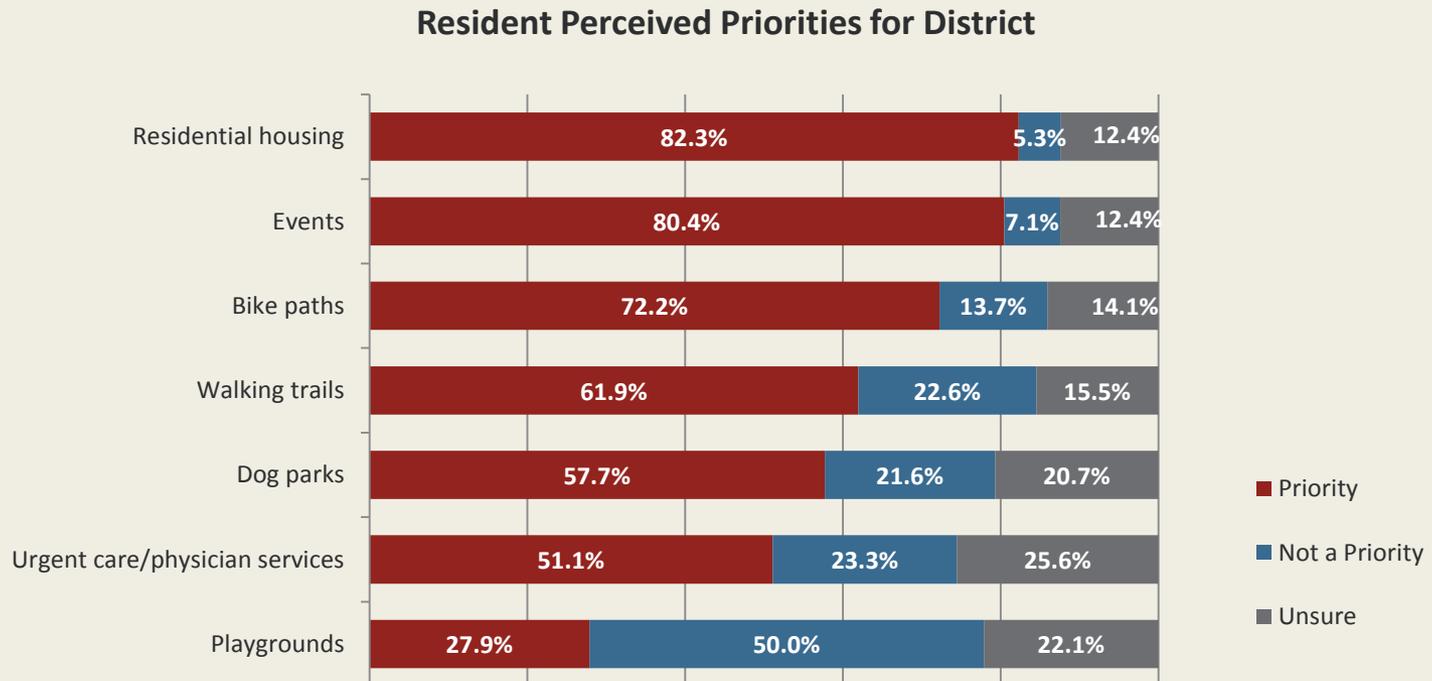
Resident Patronage

Usage in Ybor if More Available:

1 in 4 would be daily users of:
-Grocery stores
-Health Club/Gym

1 in 2 would be weekly+ users of
-Grocery stores
-Casual dining
-Coffee shop
-Convenience store
-Health Club/Gym

3 in 4 would be monthly+ users of
-Grocery store
-Casual dining
-Coffee shop

Current Expenditure Frequencies Outside of Ybor:

3 in 4 residents leave Ybor at least once per month for:
-Grocery store
-Casual dining restaurant
-Clothing stores/boutiques
-Pharmacies/drug stores
-Fine dining restaurants

1 in 3 leave 2-4 times a month for:
-Casual dining
-Clothing stores/boutiques
-Pharmacies/Drug stores
-Fine dining

1 in 4 leave 5 or more times a month for:
-Grocery
-Health club/gym
-Casual dining
-Convenience store
-Pharmacies/Drug stores

Resident - Share of Monthly Expenditures

- Respondents reported the percentage of their income that they spend in the categories below.

|	Food & Beverage	Apparel/ Apparel Services	Household Furnishings	Electronics	Personal Care & Related Services
Mean	34%	11%	6%	5%	14%
Median	26%	10%	5%	3%	10%
Mode	25%	10%	0%	0%	10%

- The average resident spends just over one-third on F&B, 14% of their income on personal services and 11% on apparel/apparel services.

Resident - Times Active in District

Most active times for residents were Happy Hour and Evening hours.

- Late Bird → *612 residents*
- Evening → *1,242 residents*
- Happy Hour → *1,324 residents*
- Afternoon → *812 residents*
- Lunchtime → *812 residents*
- Morning → *762 residents*
- Early Bird → *513 residents*

Time Ranges Actively Spending Time in Ybor

Time Range	Percentage
Early Bird (5-8am)	28.8%
Morning (8-11am)	42.8%
Lunchtime (11am-2pm)	45.6%
Afternoon (2-5pm)	45.6%
Happy Hour (5-8pm)	74.4%
Evening (8-midnight)	69.8%
Late Bird (midnight to 4am)	34.4%
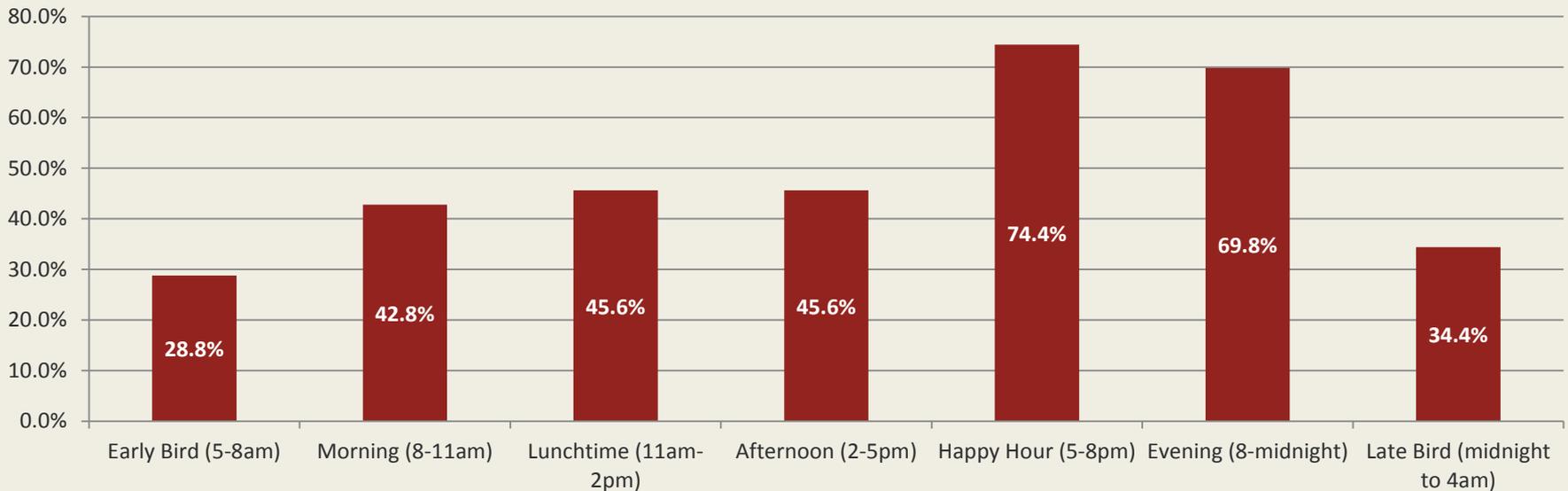
Resident - Transportation

- The most popular modes were walking, car, streetcar, Uber/Lyft and personal bicycle

- Write-in responses included Coast bikes and rental cars

Modes of Transportation Used

Mode	Percentage
By foot	91.2%
Personal car	89.4%
TECO Line Streetcar	63.0%
Uber/Lyft	57.9%
Personal bicycle	42.1%
Friend's vehicle	26.4%
Taxi	9.7%
HART bus service	6.9%
Motorcycle/scooter	6.5%
Skateboard	4.2%
Other (please specify)	5.1%

13
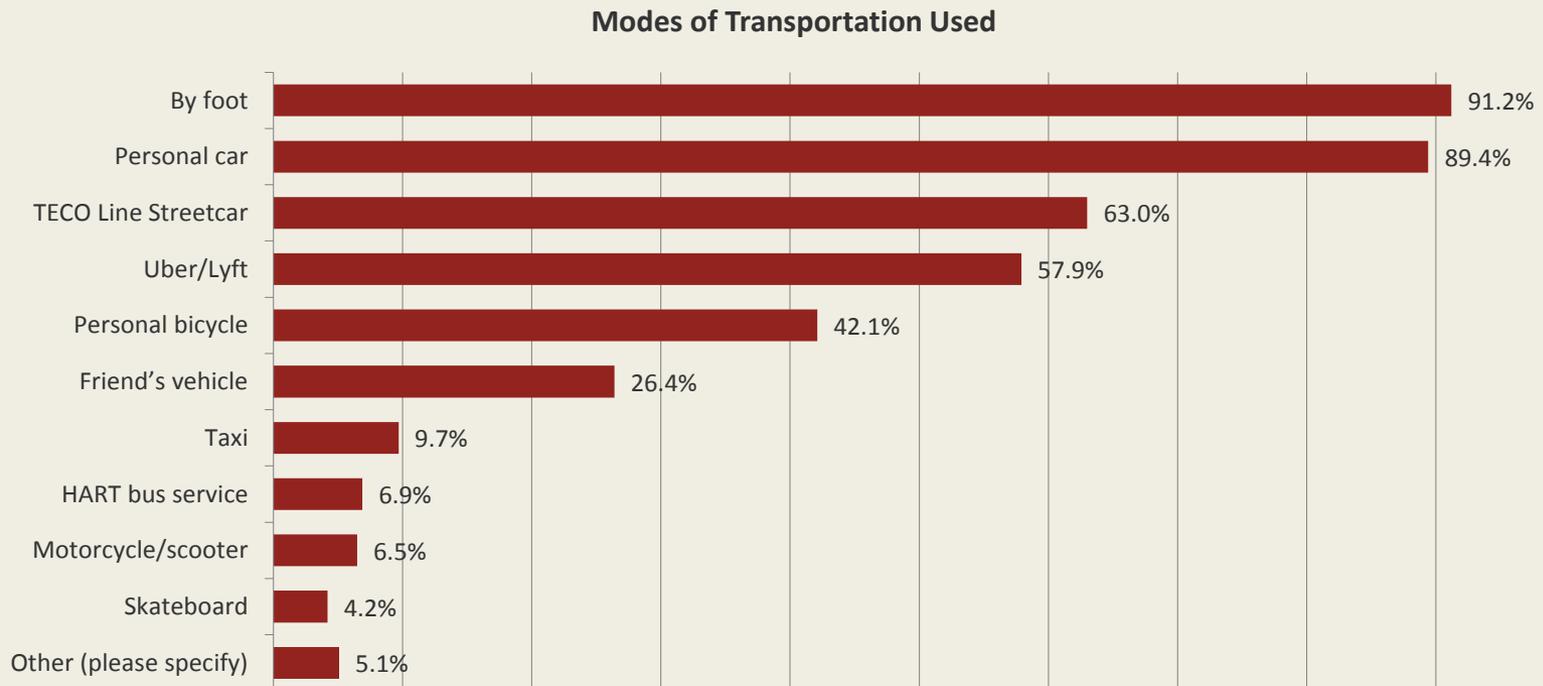
Resident - Transportation Satisfaction

**Users of the following modes shared their satisfaction**.

- Half or more are satisfied (somewhat or completely) with the modes used.

- Modes they named using if they were more available included light rail, extended streetcar hours/routes, safe walking paths, bike rentals/paths, and carriage rides.

|	Completely Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Completely Satisfied
Uber/Lyft	0.8%	1.6%	31.1%	66.4%
Friend's vehicle	0.0%	9.1%	43.6%	47.3%
Personal car	6.8%	9.5%	40.0%	43.7%
By foot	0.5%	14.9%	43.3%	41.2%
Motorcycle/scooter*	7.7%	15.4%	38.5%	38.5%
TECO Line Streetcar	2.3%	21.1%	42.9%	33.8%
HART bus service*	7.1%	14.3%	50.0%	28.6%
Personal bicycle	6.8%	21.6%	47.7%	23.9%
Skateboard*	22.2%	22.2%	44.4%	11.1%
Taxi*	25.0%	25.0%	50.0%	0.0%

*Small respondent base

Resident - Employment

- A vast majority of residents are employed—92%.

- Industries of employment varied, as shown below.

  - *Write-in responses included architecture, real estate, videography, entrepreneurs and food service*

- Resident demand for job openings exceeds supply.

Industry of Employment

Industry	Percent
Education	13.8%
Management/Professional	13.3%
Technology	8.7%
Public service/Government	8.7%
Sales/Retail/Customer service	7.7%
Medical/Patient care	6.7%
Banking/Financial	5.6%
Media/Entertainment	5.6%
Service/Maintenance/Construction	4.6%
Legal Services	3.1%
Non-Profit	3.1%
Clerical/Administrative	2.6%
Other (please specify)	16.4%

Perceptions of Job Availability

|	Percent
There are not enough job openings for my skill set in Ybor City	73.3%
There are a fair amount of job openings for my skill set in Ybor City	22.5%
There are many job openings for my skill set in Ybor City	4.2%

Resident - Commute

- 6 in 10 Ybor residents work within 15 minutes of their home.

- 1 in 10 commutes more than 30 minutes.

- Personal car is the most common mode of commute.

- 9 in 10 of those with a 16+ minute commute would prefer to work in Ybor if there was a suitable job for their skillset.

Ybor Job Location Preference

Definitely	75.0%
Probably	13.2%
Probably not	11.8%
Definitely not	0.0%

Length of Commute

- Less than 5 minutes — 24.9%
- 5 to 15 minutes — 36.3%
- 16 to 30 minutes — 25.9%
- 31 to 45 minutes — 6.7%
- More than 45 minutes — 6.2%

Commute Modes

- Other (please specify) — 7.8%
- Carpool — 1.0%
- Public transportation — 1.0%
- Bike — 2.1%
- Walk — 12.4%
- Drive personal car — 75.6%

16
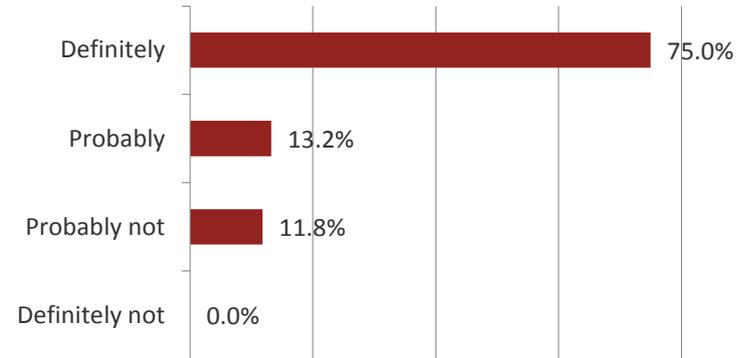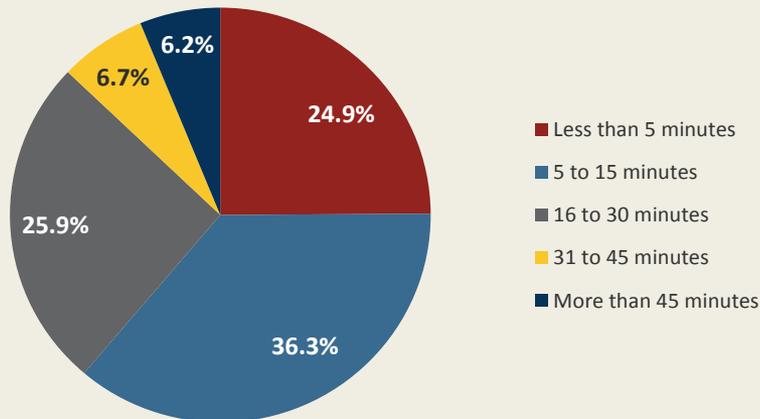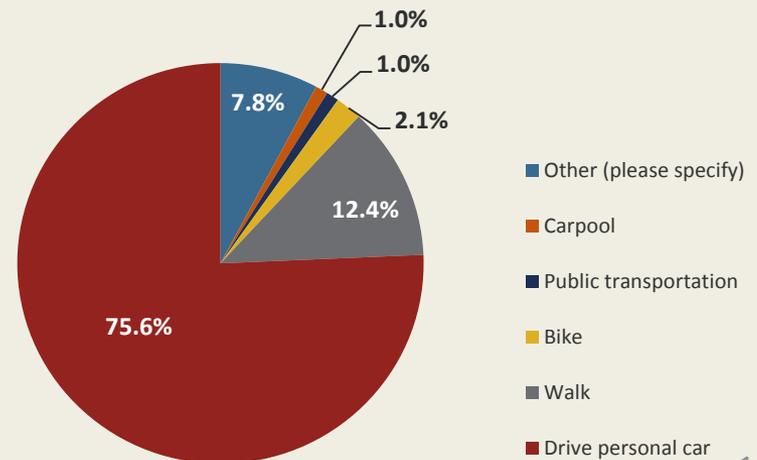
Resident - Motivations to Come to Ybor

Respondents shared their top motivations for moving to Ybor, with the *urban lifestyle experience*, *restaurants* and *arts/entertainment* factoring in the decision for more than half of the residents.

Motivations to Move to Ybor

Motivation	Percentage
Experience the urban lifestyle	76.0%
Restaurants	64.9%
Arts/Entertainment	60.6%
Close proximity to work	49.5%
Events/Special programs/Functions	48.6%
Ethnic/Racial diversity	37.5%
Affordability	36.5%
Proximity to friends and family	31.3%
Investment opportunity	25.0%
Retail shops	10.1%
Security/Safety	5.3%
Personal services (spas, dry cleaners, gyms, etc.)	3.4%

Resident - Ybor's Strengths & Weaknesses

Strengths:

Neighborhood Feel History
Urban Lifestyle Diverse
Sense of Community
Entertainment
Potential for Growth Happy Hour
Walkability
Affordable Fun
Restaurant Options
Clubs
Central Location
Architecture
Cultural Roots Atmosphere
Experiences

Weaknesses:

Walkability Vacancies Crime
Convenience Stops
More Variety
Parking Rates &Safety
Housing Affordability/Availability
Focus Beyond 7th Ave
Inbound & Outbound Traffic
Grocery Safety
Homeless/Panhandlers
Noise Reputation Cleanliness
Surrounding Neighborhoods
More Dining

Resident - Challenges

Number of factors challenge Ybor as a residential community:

- Need to leave for daily personal needs
  (gym, grocery, pharmacy, shopping, convenience)

- Discrepancy in sense of personal safety expectations
  (better lighting, police presence, homeless, visible security guards)

- Transportation options are limited (streetcar hours, route), Coast Bike is not fully present through East and West Ybor prompting high personal car usage and Uber/Lyft reliance

- Insufficient job opportunities for full *live/work/play experience*

- Lack of retail diversity

- Current residential density

- Panhandlers can be aggressive and homeless population puts residents at dis-ease

- Parking cost and safety

- Limited daytime activity

- Interest in greater diversity of housing options than current inventory

- Construction projects interrupt the norm

Resident - Advantages

Factors making Ybor a strong residential community:

- Expectations best align with experience for festivals/events/things to do, parking affordability and accessibility, walkability, streetscapes, F&B hours, etc.

- Users of current transportation mediums available report satisfaction.

- Convenient distance to downtown, ability to walk through the district and connectivity to highways.

- Authenticity—residents acknowledge Ybor's great character, fascinating history, and stunning architecture.

- There is a sense of community that produces a familial feel.

- All are welcome.

- Vibrant place from the diversity that lives here—ethnicity, age, sexual orientation, to the variety in restaurants and things to do and see.

- Affordable housing and entertainment.

- Lots of potential for growth.

Workers

Workers - Demographics

Ybor workers tend to skew younger and indicate lower income than downtown workers. More indicate being single.

	Ybor City	Downtown Tampa
Gender		
Male	39.3%	30.0%
Female	60.7%	70.0%
Age		
Under 25	7.3%	3.2%
25 to 34	23.4%	19.0%
35 to 44	24.1%	22.7%
45 to 54	25.4%	28.1%
55 to 64	15.8%	22.4%
65+	4.0%	4.6%
HHI		
Under $35,000	9.6%	15.9%
$35,000 to $49,999	18.9%	
$50,000 to $99,999	31.3%	38.4%
$100,000 to $149,999	23.4%	23.6%
$150,000 to $199,999	9.3%	11.1%
$200,000+	7.6%	11.0%

	Ybor City	Downtown Tampa
Marital Status		
Married	53.2%	60.6%
Single	36.5%	26.1%
Divorced/Separated/Widowed	10.4%	13.3%
Currently a student at UT, Saint Leo (Channel District), HCC (Ybor) or Stetson University (Tampa)?		
Yes	4.6%	1.7%
No	95.4%	98.3%
Children in HHLD		
Yes	32.8%	37.1%
No	67.2%	62.9%

Downtown Tampa Data Source: Tampa Downtown Partnership

Workers – Most Important & Satisfied

Most Important:

- Sense of personal safety
- Good parking accessibility
- Walkability

Most Satisfied:

- Convenient food/ beverage hours of operation
- Walkability
- Diversity in food/ beverage options

23

Workers – Largest & Smallest Expectations Gaps

Largest Expectation Gaps:

Smallest Expectation Gaps:

Sense of personal safety

Incoming/outgoing traffic flow

Good parking accessibility

Affordable housing options

Festivals and events

Quality housing options

Workers - Quality of Life

- Workers shared the areas most important to them and then how satisfied they were with their experience with each as an employee within Ybor.

Workers - Sentiments

8 in 10 workers are:

- Satisfied with working in Ybor City
- Likely to recommend Ybor as a place to work

Workers shared that the following would improve their satisfaction:

- Parking availability
- Parking affordability
- Addressing the homeless
- Improving sense of security
- More shopping
- Better traffic flow/light timing
- Increased food options
- Ability to run lunchtime errands w/o leaving Ybor

Satisfaction Working in Ybor City

Category	Percentage
Extremely satisfied	35.8%
Somewhat satisfied	47.6%
Neutral	11.4%
Somewhat dissatisfied	3.6%
Extremely dissatisfied	1.6%

83.4%

Likelihood of Recommending Ybor City

| Category	Percentage
Definitely likely	20.1%
Likely	38.2%
Somewhat likely	25.3%
Somewhat unlikely	9.5%
Unlikely	5.3%
Definitely unlikely	1.6%

83.6%
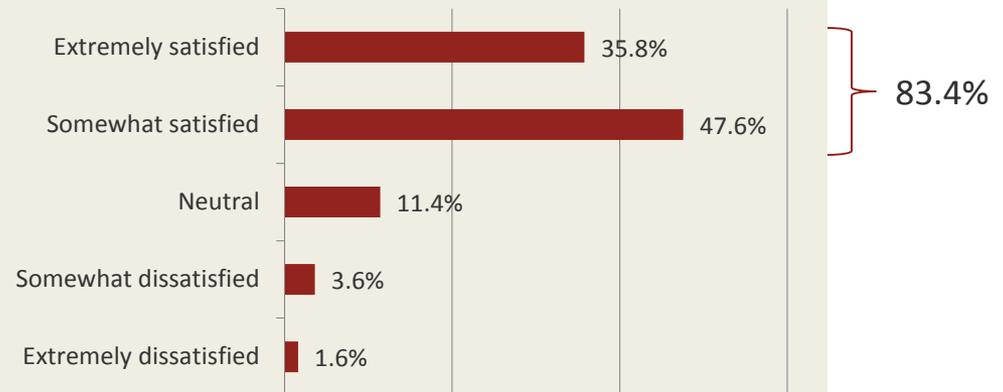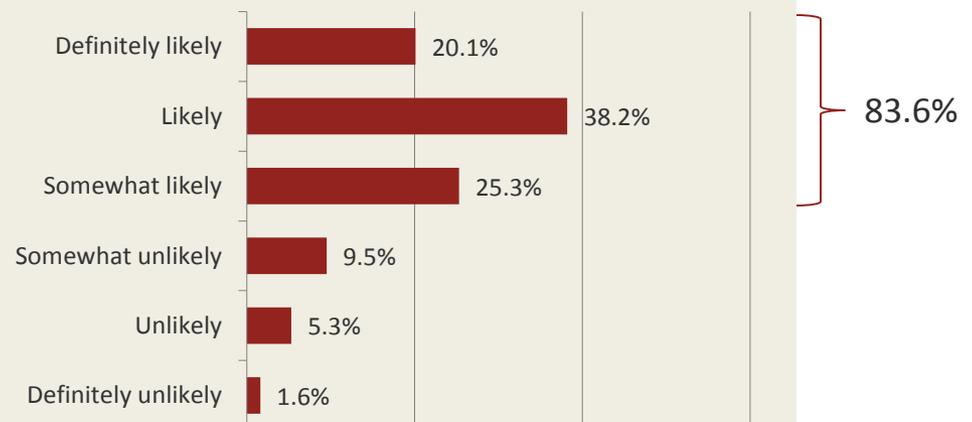
Workers - Priorities

Top priorities from those provided were:

– *Events, Walking trails, Bike paths, Residential Housing, Urgent/Physician Services*

Worker Perceived Priorities for District

Category	Priority	Not a Priority	Unsure
Events	63.1%	11.1%	25.8%
Walking trails	54.3%	20.4%	25.2%
Bike paths	54.3%	19.9%	25.9%
Residential housing	53.5%	15.5%	31.0%
Urgent care/physician services	48.7%	17.9%	33.3%
Playgrounds	32.0%	32.0%	36.1%
Dog parks	28.9%	37.1%	34.0%
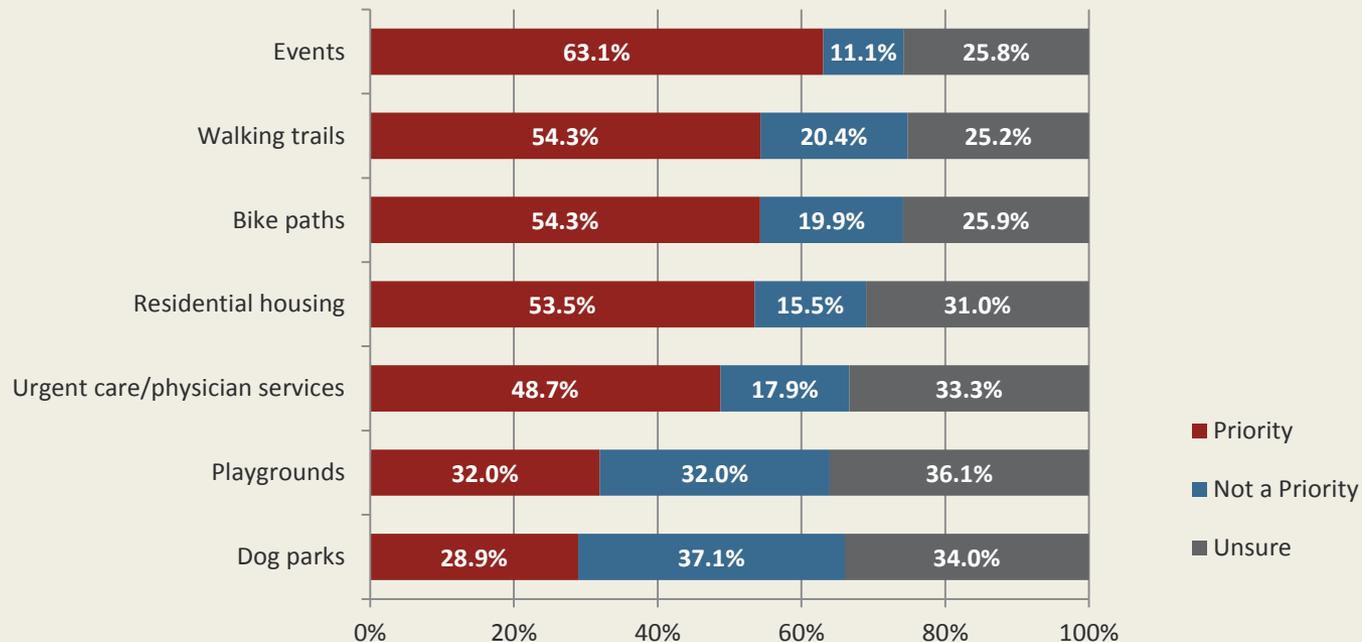
Worker Patronage

Usage in Ybor if More Available:

1 in 4 would be daily users of

- Coffee shops/cafes

- Health clubs/gyms

1 in 2 would be weekly+ users of

- Coffee shops/cafes

- Casual dining restaurants

- Grocery store

- Convenience store

7 in 10 would be monthly+ users of

- Casual dining restaurants

- Coffee shops/cafes

- Grocery store

Current Expenditure Frequencies Outside of Ybor:

2 in 3 workers leave Ybor at least once per month during the workday for:

-Casual dining restaurants
-Grocery stores

1 in 4 leave 2-4 times a month for:

-Casual dining restaurants
-Grocery stores
-Pharmacies/Drug stores
-Coffee shops/Cafes
-Fine dining restaurants
-Convenience stores

1 in 5 leave 5 or more times a month for:

-Grocery stores
-Health clubs/gyms
-Casual dining restaurants

Workers – Active Time Periods

- 4 in 5 Ybor workers are active in the district between 8 AM and 5 PM

- Employees are not only limiting their time in Ybor to traditional work hours:

  - *More than 1 in 4 are present during "Early Bird" hours*

  - *Two-thirds are present during "Happy Hour" timeframe*

Time Ranges Actively Spending Time in Ybor City

Time Range	Percentage
Late Bird (midnight to 4am)	11.0%
Evening (8-midnight)	23.3%
Happy Hour (5-8pm)	66.7%
Afternoon (2-5pm)	87.7%
Lunchtime (11am-2pm)	88.0%
Morning (8-11am)	84.8%
Early Bird (5-8am)	31.4%

29
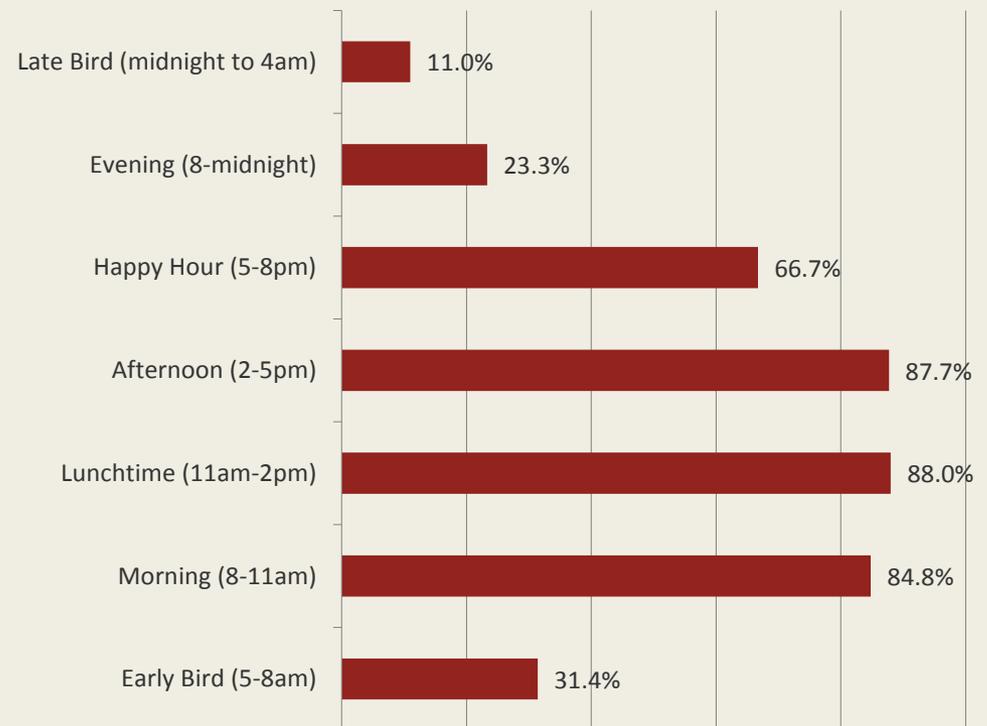
Workers-Transportation

The most popular modes of transportation were:

- Personal car

- Walking

- Uber/Lyft

Modes of Transportation Used

Mode	Percentage
Personal car	92.4%
By foot	59.8%
Uber/Lyft	26.6%
Friend's vehicle	19.6%
TECO Line Streetcar	18.9%
Personal bicycle	7.3%
Taxi	6.0%
HART bus service	3.0%
Motorcycle/scooter	3.0%
Skateboard	1.7%
Other (please specify)	2.0%
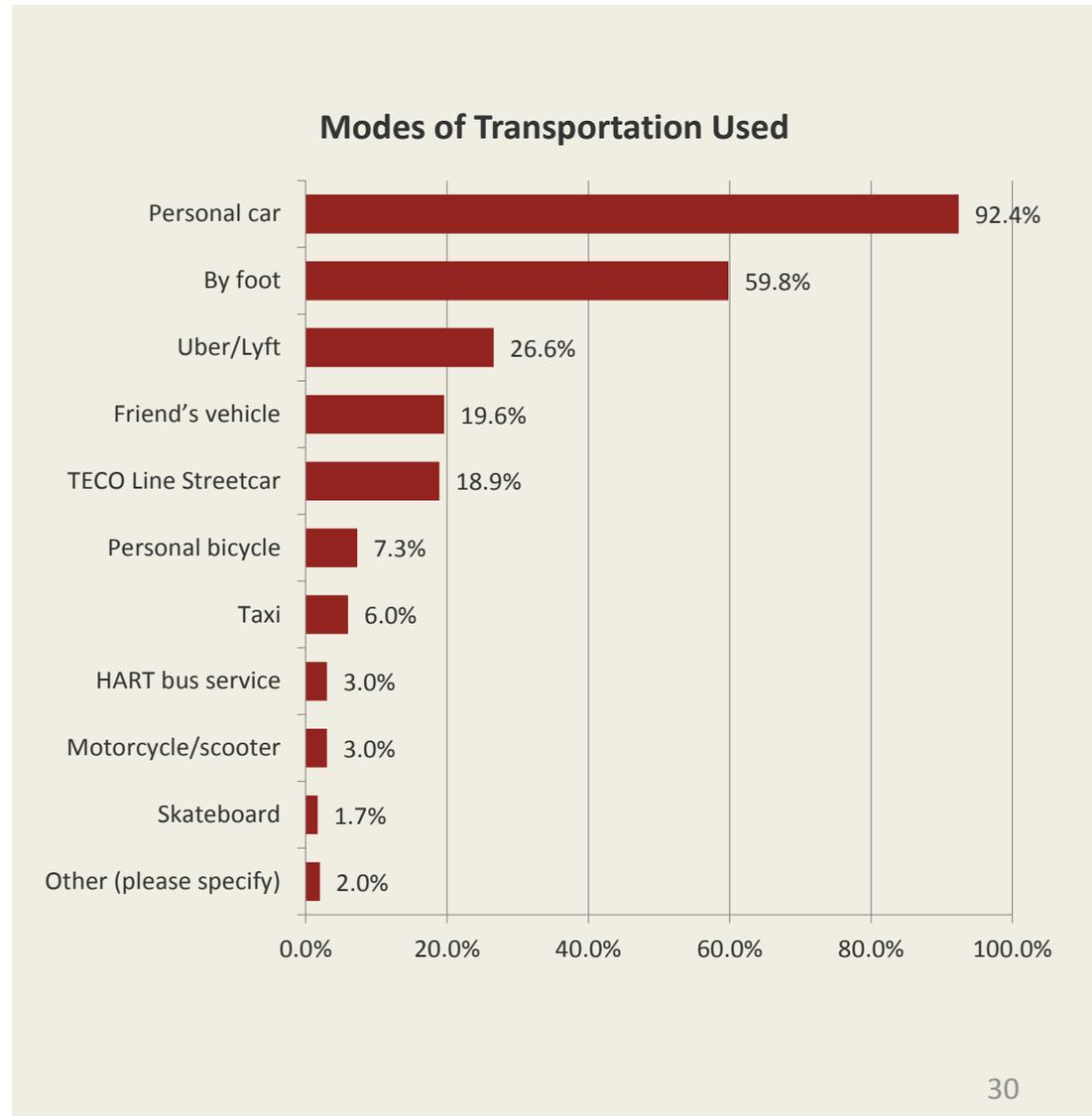
Workers - Transportation Satisfaction

**Users of the following modes shared their satisfaction.**

- Half or more are satisfied (somewhat or completely) with the modes, with the exception of skateboarding.*

- Modes they would use if available included streetcar (earlier start, faster, extended line, light rail/high-speed connectors); bicycles (rentals, paths); and bus (if direct route).

|	Completely Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Completely Satisfied
Uber/Lyft	2.6%	7.8%	32.5%	57.1%
Friend's vehicle	3.4%	8.6%	55.2%	32.8%
Personal car	2.9%	13.5%	41.1%	42.5%
By foot	5.1%	12.0%	45.1%	37.7%
Motorcycle/scooter*	12.5%	12.5%	25.0%	50.0%
TECO Line Streetcar	1.8%	26.8%	35.7%	35.7%
Personal bicycle*	10.0%	20.0%	50.0%	20.0%
Taxi*	23.5%	17.6%	41.2%	17.6%
HART bus service*	33.3%	11.1%	44.4%	11.1%
Skateboard*	100.0%	0.0%	0.0%	0.0%

*Small respondent base

Workers – Industries Employed

- Industries of employment varied

- Write-in responses included:

  - *Staffing*

  - *Hospitality*

  - *Architecture*

  - *Marketing*

- Workers would like to see more job openings for their skillsets in Ybor.

Industry of Employment

Industry	Percentage
Management/Professional	21.1%
Sales/Retail/Customer service	18.8%
Education	16.8%
Technology	5.6%
Media/Entertainment	3.3%
Service/Maintenance/Construction	3.3%
Public service/Government	3.0%
Clerical/Administrative	2.3%
Banking/Financial	2.0%
Non-Profit	2.0%
Legal Services	1.3%
Medical/Patient care	0.0%
Other (please specify)	20.7%

Perceptions of Job Availability

There are not enough job openings for my skill set in Ybor City	59.2%
There are a fair amount of job openings for my skill set in Ybor City	36.4%
There are many job openings for my skill set in Ybor City	4.4%

Workers - Commute

- A majority of respondents were fulltime employees within the district.

- 1 in 4 employees indicated living within 15 minutes of Ybor and 6 in 10 live within 30 minutes.

- Personal car is the most common mode of commute.

Employment Status

7.2%

92.8%

- Full-time
- Part-time

Commute Mode

2.3% 0.7% 2.0%
2.0%

93.2%

- Other (please specify)
- Public transportation
- Walk
- Bike
- Drive personal car

Length of Commute

4.9%
12.7%
22.8%
26.4%
33.2%

- Less than 5 minutes
- 5 to 15 minutes
- 16 to 30 minutes
- 31 to 45 minutes
- More than 45 minutes
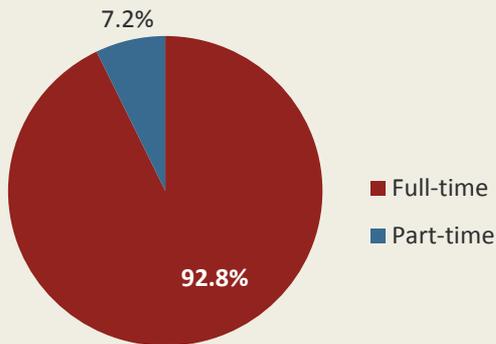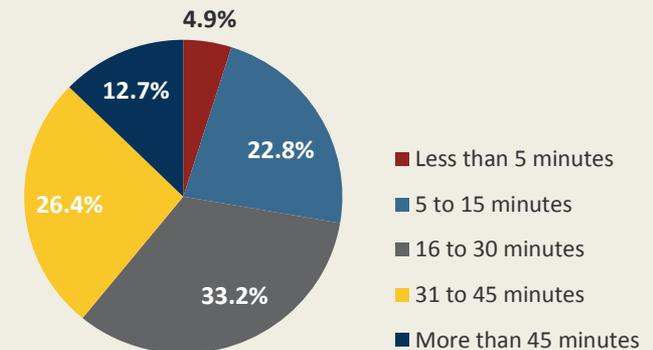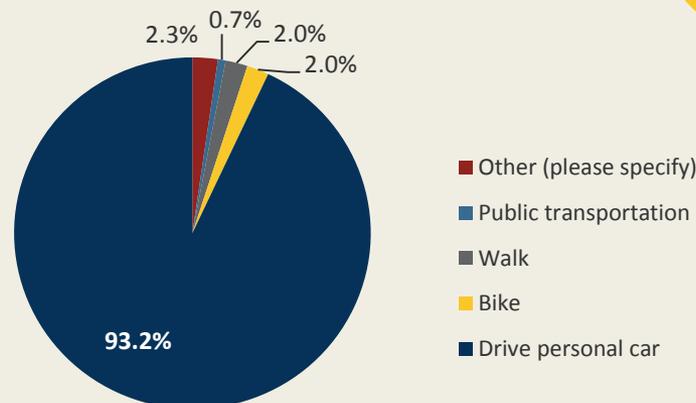
Workers – Residential Communities

Ybor workers are in large part Hillsborough County residents.

- Top communities include Downtown, the City of Tampa proper, and South Tampa

Top 10 Communities of Ybor Worker Residence	Share of Workers
Downtown Area	14.6%
Tampa	13.4%
South Tampa	9.3%
University	6.3%
New Tampa	5.2%
Riverview	4.9%
Brandon	4.5%
Valrico	4.5%
West Tampa	4.5%
Carrollwood	3.4%

Worker County of Residence

- Hillsborough 82%
- Pasco 8%
- Pinellas 8%
- Outside 2%
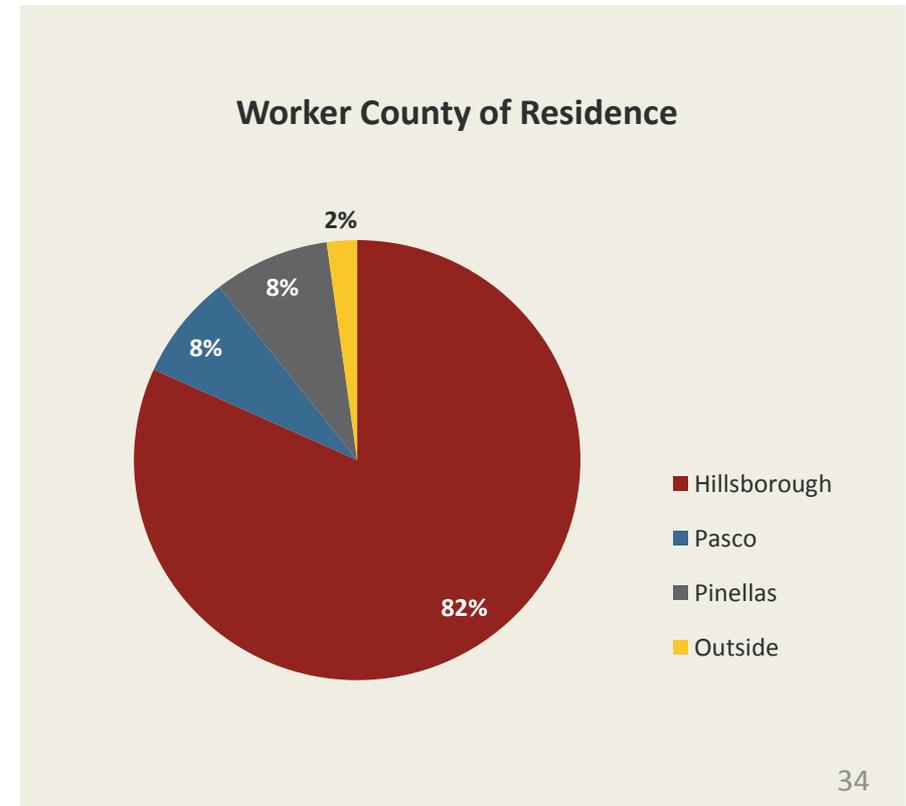
Workers - Ybor's Strengths & Weaknesses

Strengths:

Sense of Community

Bars/Clubs

Culture

Art scene

Shopping

Diversity

Architecture

Restaurants

Cool/Unique Shops

History

Events

Walkable

Things to do

Weaknesses:

Homeless/Panhandlers

Clubs & Young Kids

Safety

Sketchy People

Affordable Housing

Parking

Shopping

More Businesses

Crime

Affordable Food

Dirty

Traffic

Reputation

Daytime Activities

Limited Retail/Daily Needs

Not Kid-Friendly

Affordable Housing

Workers - Interest in Moving to Ybor

- More than <u>1 in 4 workers expressed interest</u> in moving to Ybor within the next five years.

- Those uninterested named lack of housing options of interest/affordable housing, safety concerns, lack of daily amenities, and being satisfied with their current housing, as their reasons for not expressing interest in moving to Ybor in the next five years.

Interest in Moving to Ybor Next 5 Years

Category	Percent
Completely interested	12.5%
Somewhat interested	15.8%
Unsure	15.8%
Somewhat uninterested	9.9%
Completely uninterested	43.4%

36
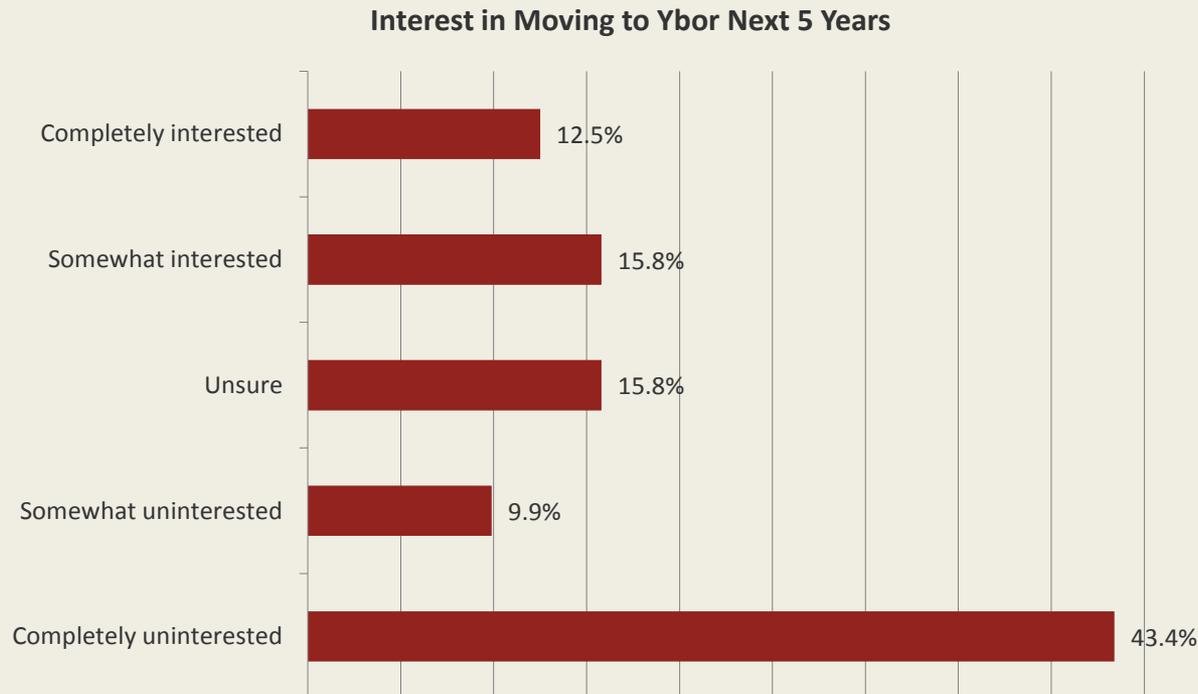
Workers - Challenges

- There are significant gaps in expectation for two of the three most important characteristics to workers—*sense of personal safety* and *parking accessibility.*

- Amenities of convenience are lacking—*grocery, gym, drug store, convenience store, dry cleaning, etc.*

- Sustaining employees will be a challenge for Ybor unless new employers enter the district.

  – More than half of employees in each industry segment feel that there are not enough openings for their skillset.

- A majority of workers live outside of Ybor and drive into the district, making them sensitive to and currently displeased with the construction that limits ingress and egress.

- Safety after hours, parking availability/cost, homeless/panhandler presence, limited shopping, and unclean streets/alleyways challenge worker satisfaction with the district.

- A vast majority of workers did not express interest in moving to Ybor within the next five years.

Workers - Advantages

Highlighted assets included the district's:

- Character

- Variety/Options

- Walkability

- Business Owners

- The Chickens

- Events

What workers consider Ybor City strengths:

- Food Options

- Historical Significance/ Culture/Architectural Style

- Easy to walk to restaurants/bars/shops

- Sense of community

- Unique shops

- Things to do

Summary

Priorities

Build perception of safety	Parking	Attraction of amenities	Non-amenity additions	Communication	Initiatives
Visible police/security presence	Visible security presence	Grocery	Diverse & Affordable Housing	Construction activities that impede pedestrian walkability	Streetcar AM hours extension
Homeless and panhandling reduction	Harsher stipulations on authorized lots	Convenience	Bike/walking paths	Traffic ingress/egress changes	Incentives for retail categories needed
Lighting	Increase valet	Gym	Dog park		EDC presentation
		Pharmacy			Fam tours
		Retail			Development (offices, residential, hotels)
		More coffee shops			
		More casual restaurants			