



# Ybor Resident/Worker Survey

# Introduction

- In 2016, the Ybor City Development Corporation (YCDC) launched its baseline district survey of residents and workers.
  - Results brought to light requested changes and improvements deployed by YCDC and its partners, including new crosswalks, 7th Avenue lighting, the “Coffee with a Cop” program, 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.
  - The second biennial installment was fielded June 21 – July 20, 2018.



Resident Population  
3,108\*

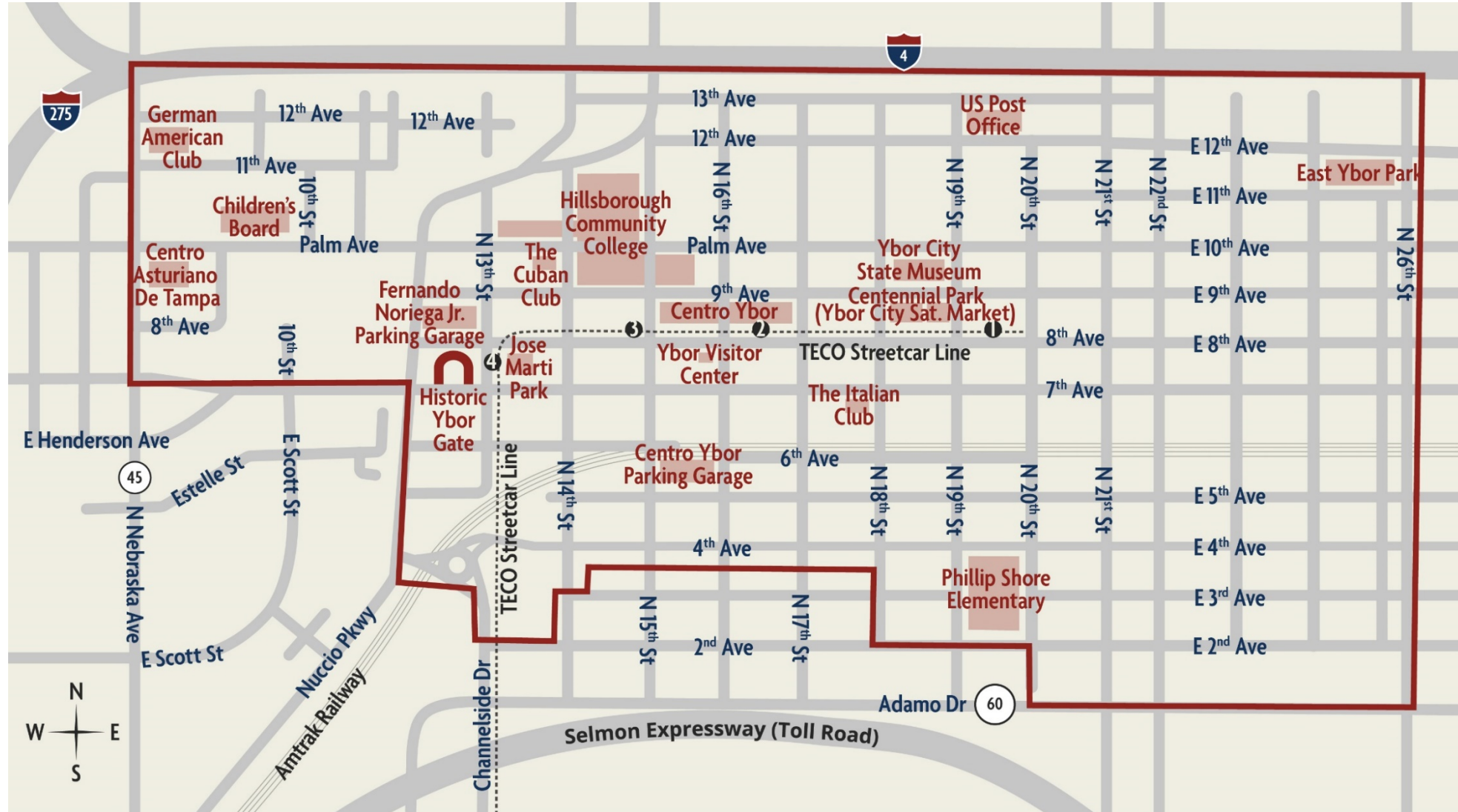


Worker Population  
9,624\*\*

*\*Resident population source: Census Tract 38– East Ybor+ & 39– West Ybor 2016*

*\*\*Worker population source: On the Map 2015*

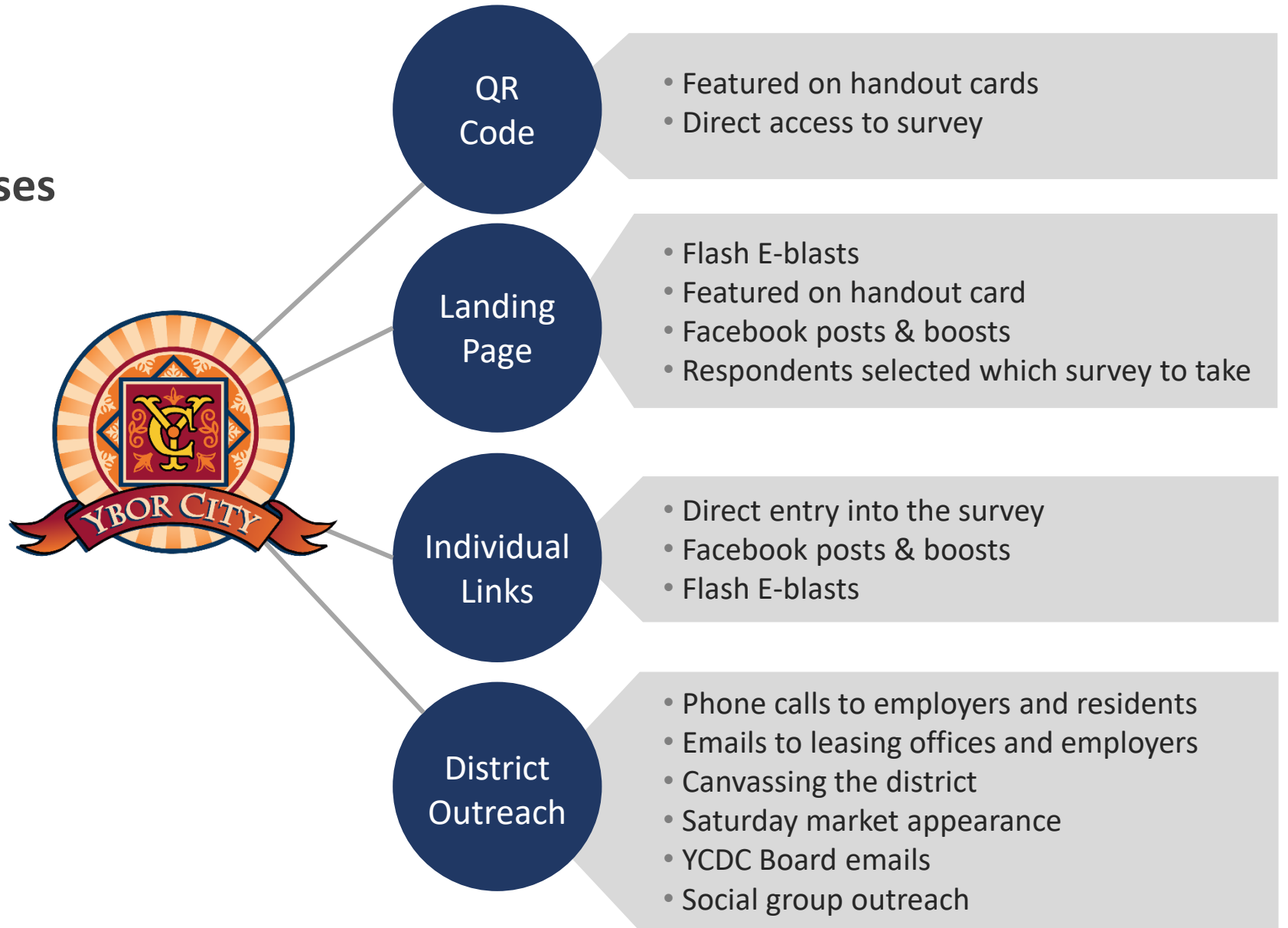
# Region of Study: Ybor CRA 1 & 2



# Methodology

**In 2018 over 750 responses were received:**

- 332 Residents
- 436 Workers
- 5% Margin of Error





# Ybor District Workers



## Assets

Things to do  
 Community  
**Walkability/Location**  
**Dining Options**  
 Trolley  
**Chickens**  
 Small Businesses  
 Nightlife/Bars

## Weaknesses

Affordable Housing  
 Diversity in Restaurants  
 Retail Diversity  
**Homelessness**  
 Stadium Transportation History  
**Safety**  
 Chickens Lighting  
**Parking/Traffic**  
 Cleanliness Things to do  
 Negative Public Perception

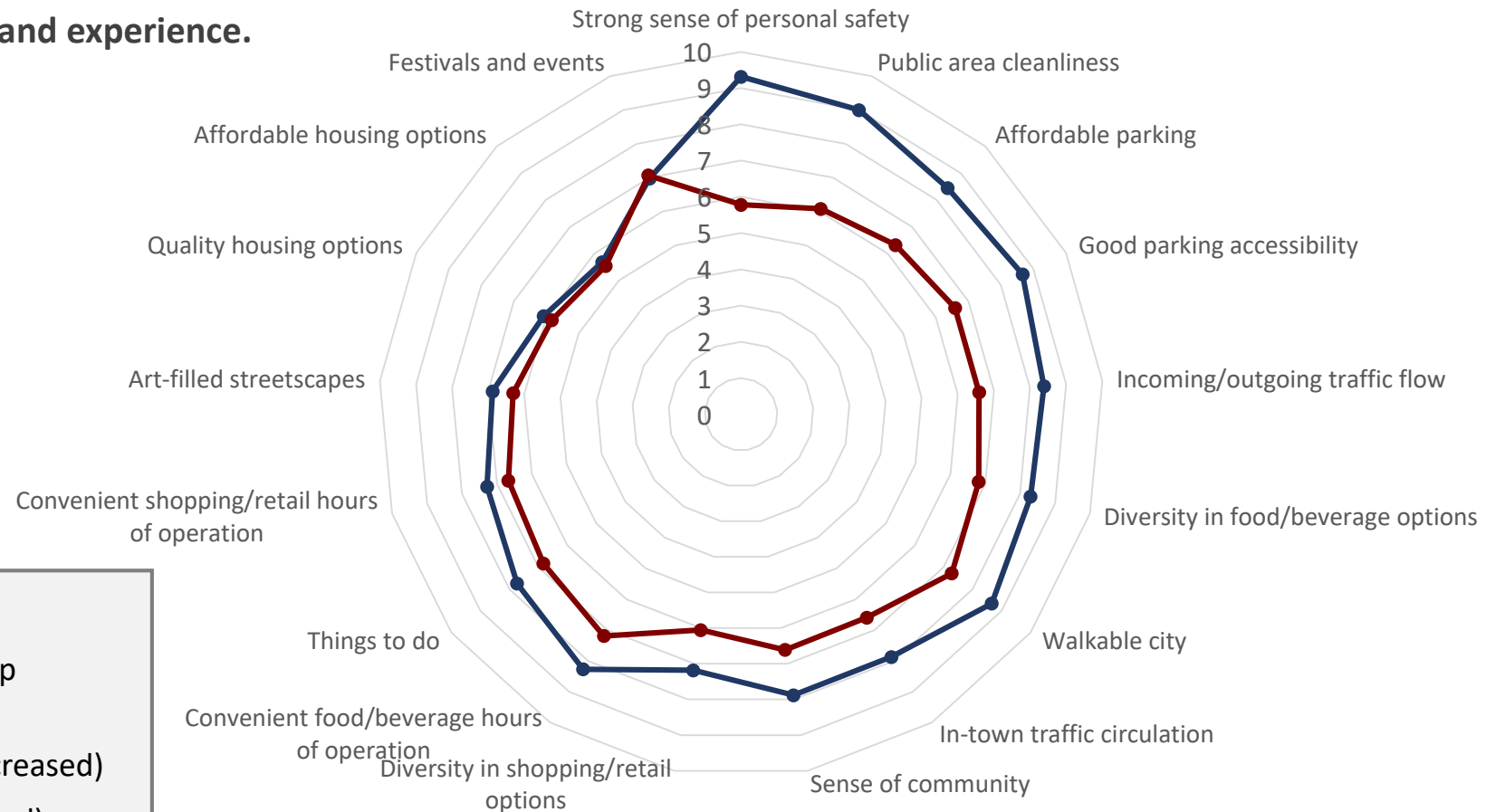
# Expectation Gaps

## 2018 Expectation Gaps

There are specific topics for which workers indicate their expectations being met, and those where there are gaps between their expectation and experience.

- Expectations being met:
  - *Festivals and events*
  - *Affordable housing options*
  - *Quality housing options*
- Largest expectation gaps:
  - *Strong sense of personal safety*
  - *Public area cleanliness*
  - *Affordable parking*

—●— Importance    —●— Satisfaction



**Note: 2018 Expectation gap shifts:**

- *Incoming/outgoing traffic flow (gap decreased)*
- *In-town traffic circulation (gap decreased)*
- *Art-filled streetscapes (gap increased)*
- *Affordable housing options (gap increased)*

# Expectation Gaps

## The top five expectations being met:



Festivals and Events



Affordable Housing Options



Quality Housing Options



Art-Filled Streetscapes



Convenient Shopping/Retail Hours of Operation

## The top five expectation gaps:



Strong Sense of Personal Safety



Public Area Cleanliness



Affordable Parking



Good Parking Accessibility



Incoming/Outgoing Traffic Flow








# District Priorities



Workers

Half or more workers place high priority on the district doing the following

	Patrolling Officers	89%
	Enhanced Lighting	83%
	Security Cameras	81%
	Outdoor Events	67%
	Retail	65%
	Open Spaces for Outdoor Recreation	65%

	Bike Paths	61%
	Extending Hours of TECO Streetcar Operation	58%
	Walking Trails	58%
	Concerts	52%
	Urgent Care/Physician Services	50%

**Note:** Priority placed on outdoor events, dog parks (44%- not shown), and bike paths significantly increased over the past two years.






# Unavailable in Ybor City

*During the workday, 1 in 5 (20%) or more workers are leaving 5+ times a month*

	Grocery Store	36%
	Casual Dining Restaurants	25%
	Health Clubs/Gyms	22%
	Convenience Stores	20%

*During the workday, half of the workers are leaving 2+ times a month*

	Casual Dining Restaurants	68%
	Pharmacies/Drug Stores	60%
	Coffee Shops/Cafes	50%

**Note:** *Significantly more workers are leaving the district for grocery stores and coffee shops/cafes than two years ago.*

# Requested Additions

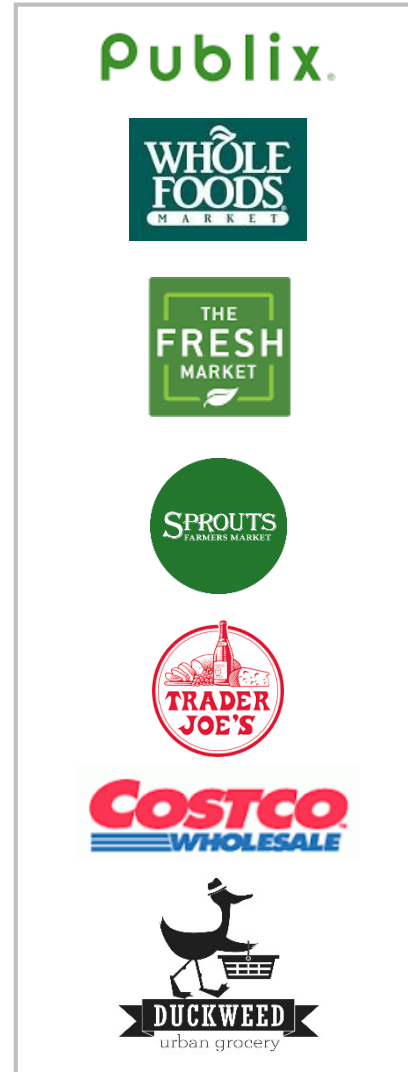


Workers

## Restaurants:



## Grocery Store:



## Retail:



## Pharmacy/ Convenient Store:



## Personal Services:

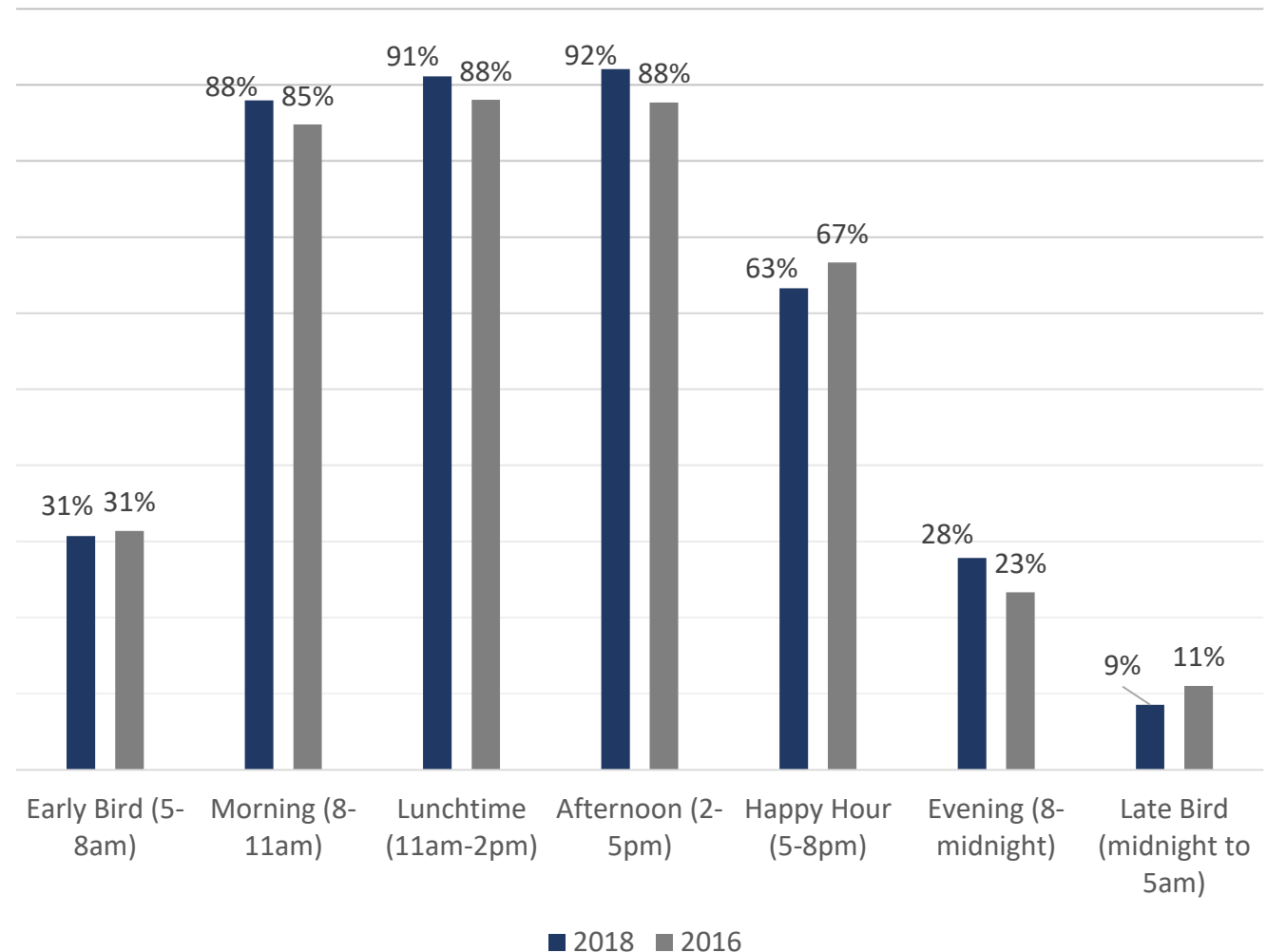
Requests for personal services were less frequent than retailers but examples included nail salons, dry cleaners, and gyms.

# Time within the District

**Hours of worker presence continue to reflect the large share of 9-5 businesses within the district.**

- Peak time for workers in the Ybor district is between 8am and 5pm.
  - Close to 9 in 10 workers are present during this timeframe
- *Evening hours (8pm to midnight)* presence has increased significantly from 23% to 28%.
- Presence during *late bird (midnight to 5am)* hours slightly declined between 2016 and 2018.

Select the typical time ranges that you are present in Ybor City, including work hours. Select all that apply.



# Transportation



Workers

*When, if ever, do you use the following modes in Ybor City?*

	Weekdays	Weekends
Personal Car	95%	55%
Travel By Foot	80%	43%
Uber/Lyft	13%	37%
TECO Line Streetcar	13%	34%
Friend's Vehicle	20%	22%
Personal Vehicle	3%	8%
Rental Bikes	1%	6%
Motorcycle/Scooter	4%	3%
Taxi	2%	4%
HART Bus Service	4%	2%

*Select which modes of transportation you would utilize if made available in Ybor.*







	District Circulator	62%
	Personal Golf Cart	49%
	Limousine	6%
	Other	14%

# Commute

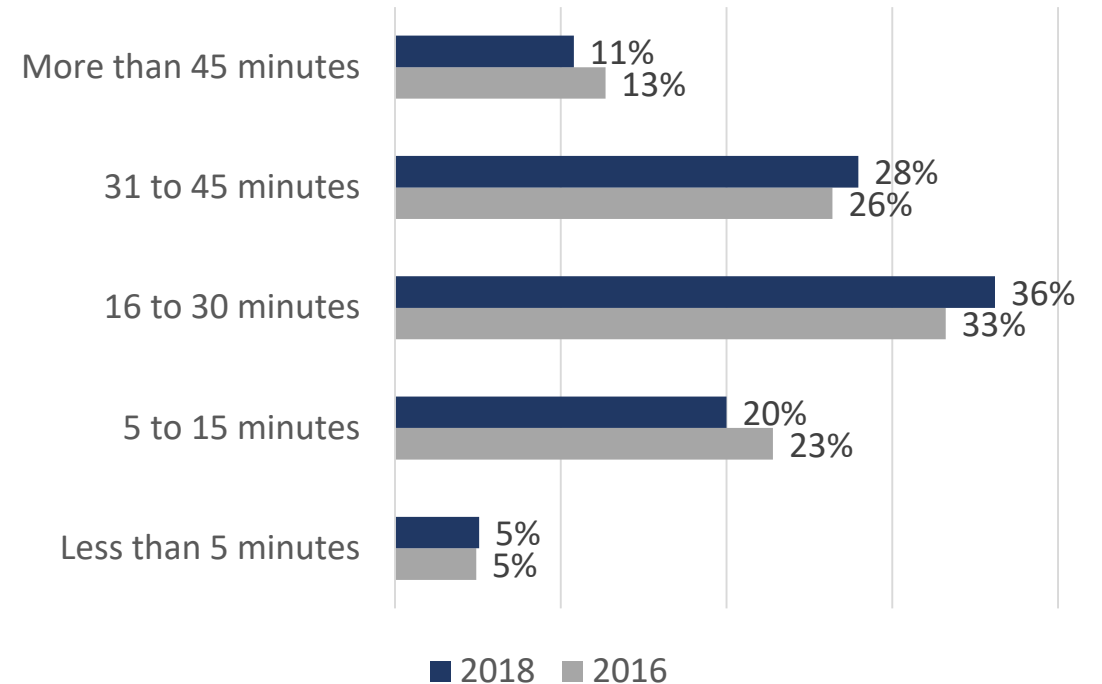
Workers continue to name personal vehicles as their primary mode of getting to work—a mode that is prompting lengthier commutes.

- Commute lengths have increased since 2016 with commutes in the 16-45 minute range accounting for 64% of workers in 2018 while only representing 59% in 2016.

*How do you normally commute to work?*

		2018	2016
	Drive Personal Car	95%	93%
	Bike	1%	2%
	Public Transportation	1%	1%
	Walk	1%	2%
	Carpool	0%	0%
	Other	2%	2%

*How long is your commute to work?*



# Parking

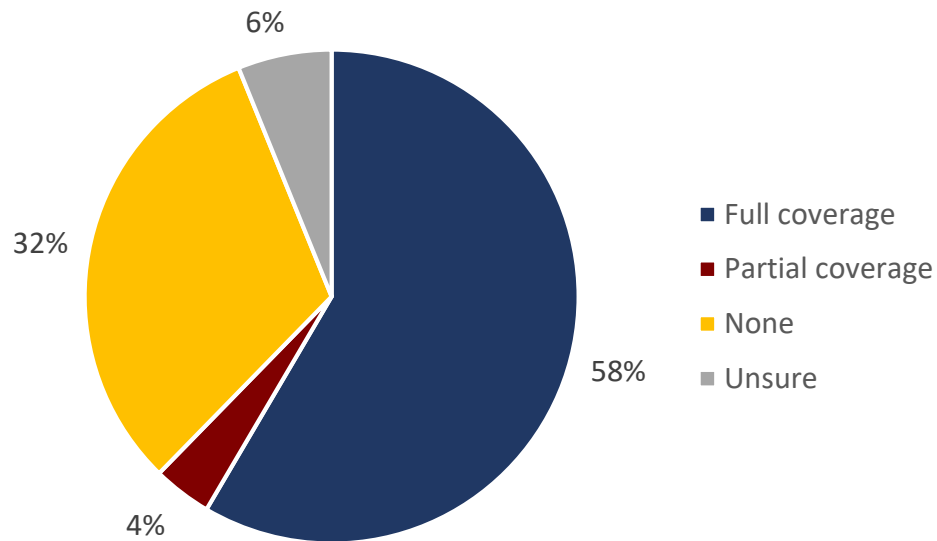


Workers

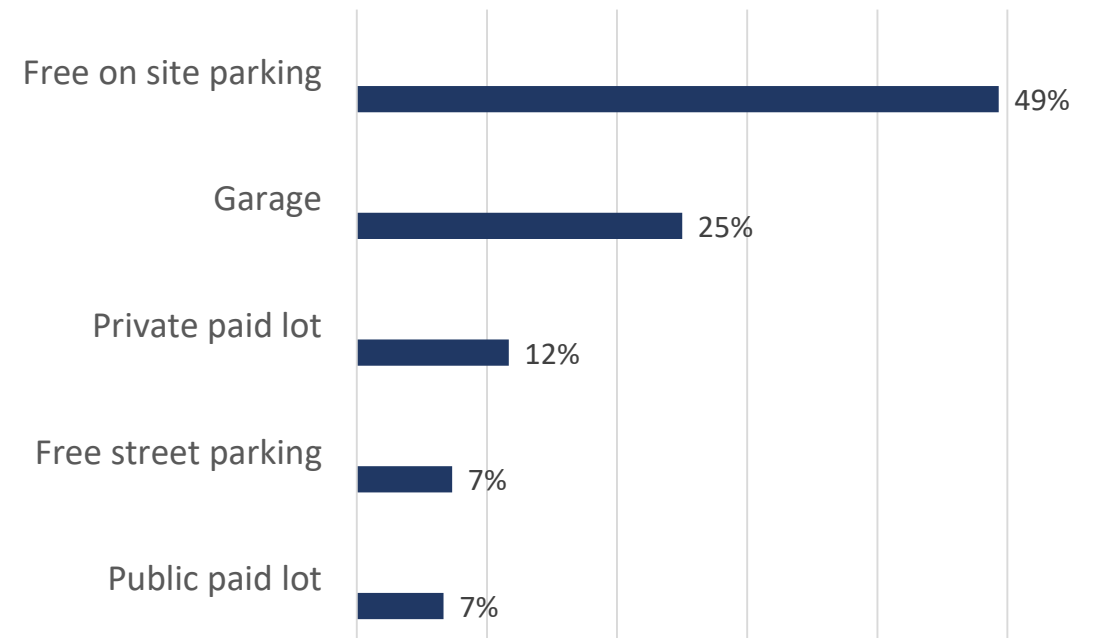
**Workers are diverse in their parking subsidy experience as well as their modes of parking in the district.**

- Approximately 3 in 5 (63%) Ybor employees have some type of parking subsidy.
- On-site and garage parking are most common for workers.
  - Close to half (49%) of the worker population park on-site for free
  - 1 in 4 (25%) workers park in a *garage*
  - The remainder park in a *private paid lot*, a *public paid lot* or find *free street parking*

*Does your work offer a parking subsidy?*



*Where do you typically park?*

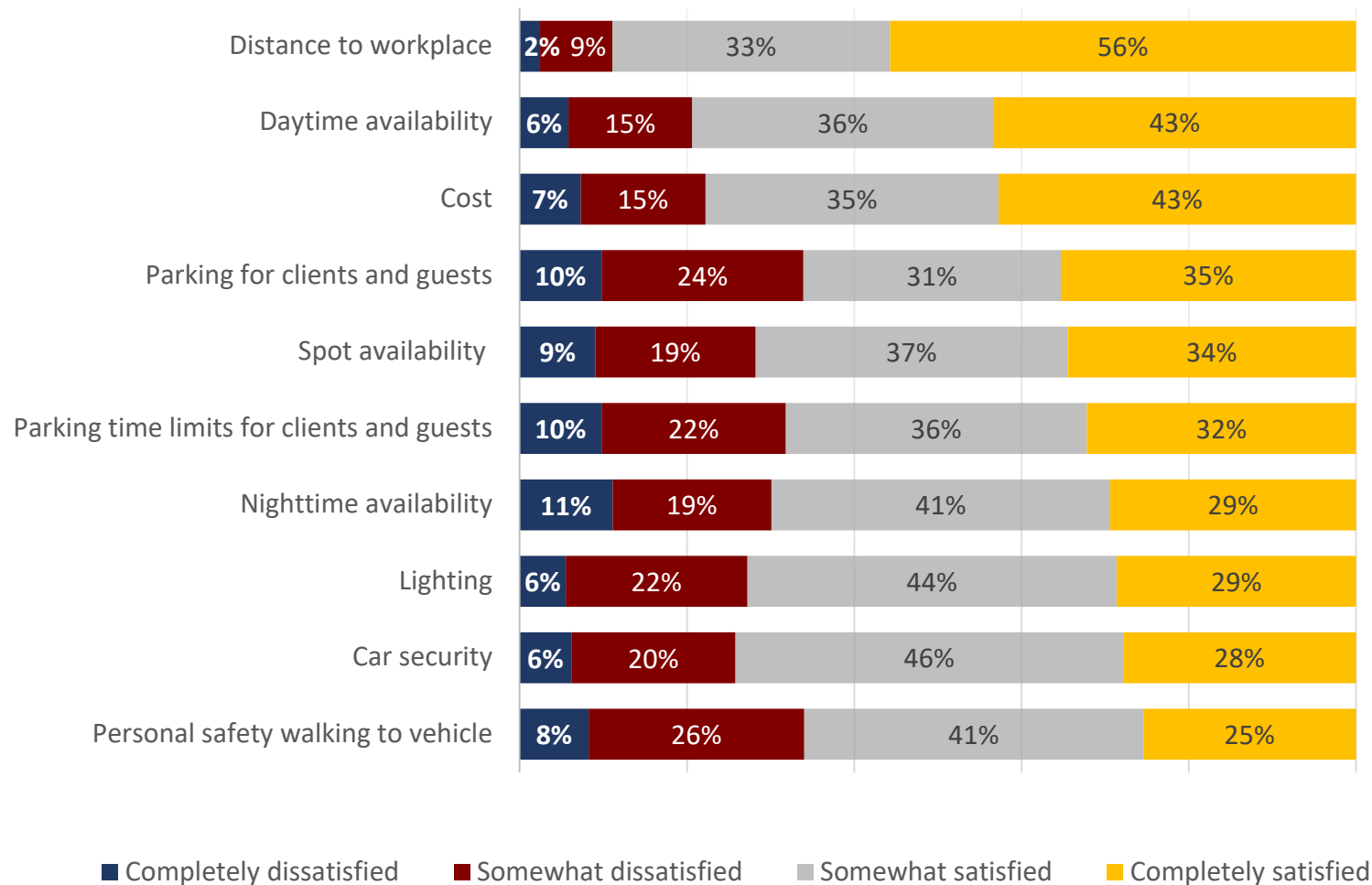


# Parking

**More workers indicated being satisfied rather than dissatisfied with the parking topics named.**

- Top areas of overall parking satisfaction were:
  - *Distance to workplace* (89%)
  - *Daytime availability* (79%)
  - *Cost* (78%)
- Top areas of overall parking dissatisfaction were:
  - *Personal safety walking to vehicle* (34%)
  - *Parking for clients and guests* (34%)
  - *Parking time limits for clients and guests* (32%)






*How satisfied are you with the following aspects of parking?*





# Sentiments in Ybor City

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

	2018	2016
 Extremely satisfied	<b>42%</b>	<b>36%</b>
 Somewhat satisfied	<b>42%</b>	<b>48%</b>
 Neutral	<b>11%</b>	<b>11%</b>
 Somewhat dissatisfied	<b>2%</b>	<b>4%</b>
 Extremely dissatisfied	<b>3%</b>	<b>2%</b>

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

	2018	2016
Definitely likely	<b>32%</b>	<b>20%</b>
Likely	<b>29%</b>	<b>38%</b>
Somewhat likely	<b>26%</b>	<b>26%</b>
Somewhat unlikely	<b>7%</b>	<b>9%</b>
Unlikely	<b>3%</b>	<b>5%</b>
Definitely unlikely	<b>3%</b>	<b>2%</b>

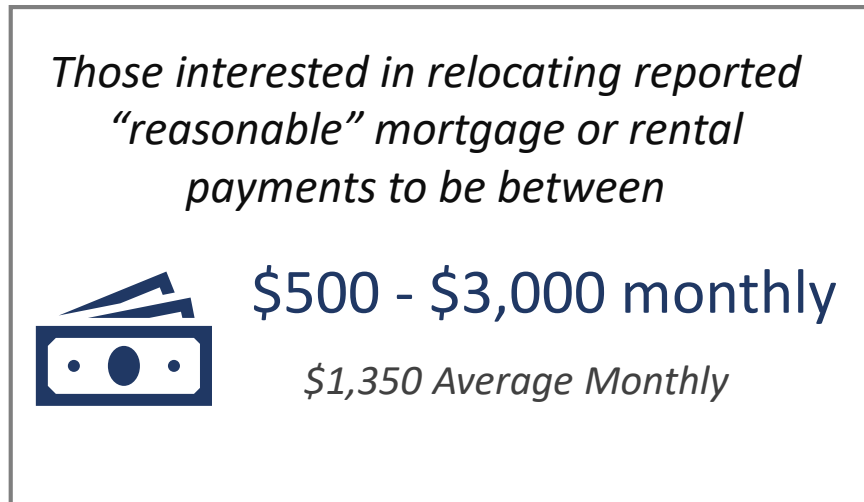
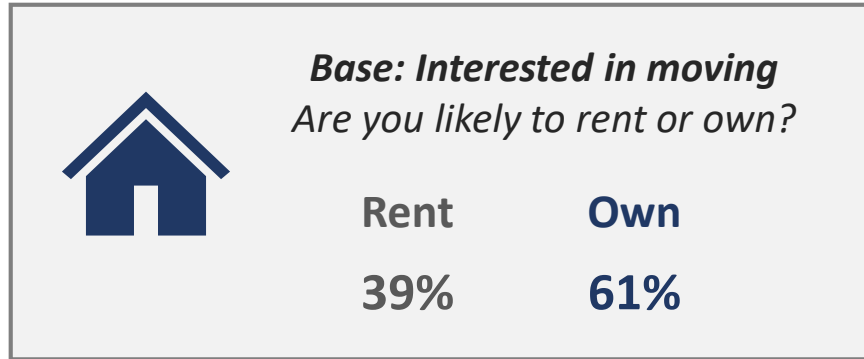
## *How interested are you in living in Ybor City within the next five years?*

	2018	2016
Completely interested	<b>12%</b>	<b>13%</b>
Somewhat interested	<b>21%</b>	<b>16%</b>
Unsure	<b>18%</b>	<b>16%</b>
Somewhat uninterested	<b>11%</b>	<b>10%</b>
Completely uninterested	<b>35%</b>	<b>43%</b>
N/A– I already live in Ybor	<b>3%</b>	<b>3%</b>

# Relocating to Ybor



Workers



*For workers uninterested in relocating, what stops you from moving to Ybor City?*





# Demographics

The profile of the Ybor workers has not significantly changed over the past two years. The worker population:

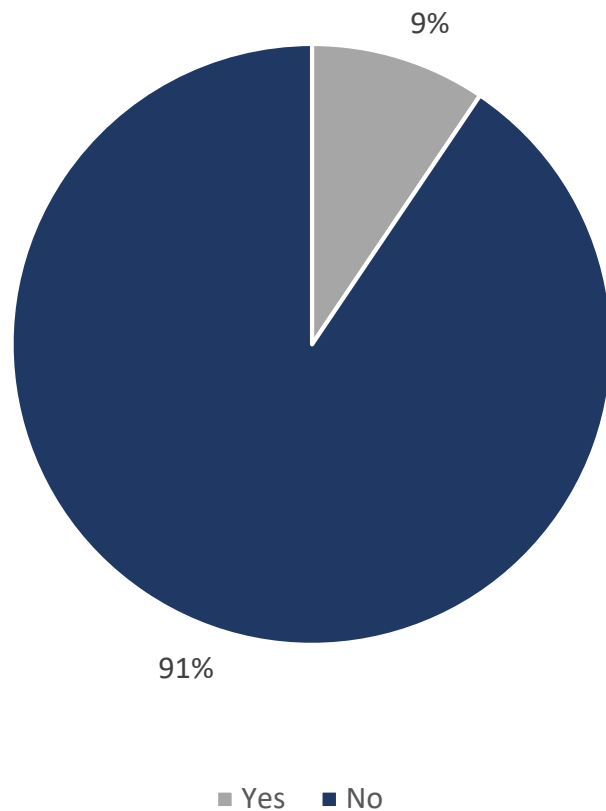
- Skews slightly female
- 3 in 10 are under 35
- Half are 35-54
- Approximately one-third each under \$50K, \$50-\$100K, and \$100k+ HHI
- Half are married
- Largely employed full-time, though part-time employment grew since 2016

Gender		
	2018	2016
Male	41%	40%
Female	59%	60%
Age Range		
	2018	2016
Under 25	6%	7%
25 to 34	23%	23%
35 to 44	25%	25%
45 to 54	24%	25%
55 to 64	15%	16%
65+	7%	4%
Household Income		
	2018	2016
Under \$35,000	11%	10%
\$35,000 to \$49,999	17%	19%
\$50,000 to \$99,999	33%	31%
\$100,000 to \$149,999	24%	23%
\$150,000 to \$199,999	6%	10%
\$200,000 to \$249,999	3%	4%
\$250,000 or more	6%	4%

Employment		
	2018	2016
Full-time	89%	93%
Part-time	11%	7%
Marital Status		
	2018	2016
Married	54%	53%
Single	36%	37%
Divorced/Separated/Widowed	10%	10%
Children		
	2018	2016
Yes	38%	3%
No	62%	68%
Pets		
	2018	2016
Dogs	33%	36%
Cats	25%	23%

# Business Owner

*Are you a business owner in Ybor City?*



**Business owners that do not live in Ybor were posed with two open-ended questions to give feedback on:**

- What ideas do you have to activate Ybor City during the summer?
  - Community events/markets -- target nighttime as well
  - Family friendly events and just making the district more family friendly
  - Focus on small businesses/diversity within district
- Do you have any feedback regarding your experience as a business owner in Ybor to share with the City?
  - Development is growing district– still not reaching its full potential
  - Concerns about homeless population/safety
  - Love being in Ybor

# Summary Notes



Workers

- Worker connection to the district appears to be **growing**.
  - Extreme sentiments such as “**extremely likely**” to recommend Ybor as a place to live and “**extremely satisfied**” with experience, significantly increased over a two year period.
  - Comments regarding the district’s culture, its live/work/play potential, walkability and furthermore increasing share interested in moving to Ybor in the future suggest **workers do not see Ybor solely as the place they “clock in and out.”**
  - Workers place **high priority in outdoor leisure district additions** that would extend their time spent within the area.
- There are areas of desired improvement, however.
  - **Safety, cleanliness and parking** are the top three expectation gaps voiced by workers.
  - Top of mind comments from workers reveal additional requests for more **casual dining, convenience shopping, grocers and coffee shops**.
- The requests for “more” reflect actual demand; **dollars are leaving the district** most frequently in the categories of *casual dining, grocery, coffee shop/café, pharmacy, convenience store, fine dining, and clothing store/boutique*.
- Workers place the **highest value on Ybor’s diversity/history/culture, variety of restaurants, walkability and location, the chickens, Ybor’s sense of community, small businesses, and a variety of things to do**.
- Positive reflections of the district’s assets are **strengthening the ability of Ybor to “keep” workers**.
  - Perceptions of the district having **job openings for their skillsets** has improved over the past two years.
  - There is **growing interest in calling Ybor home within the next five years** and demand among that group is higher for property ownership than rentals.
- The most notable challenges for Ybor moving forward when it comes to converting workers to residents, include addressing **parking** concerns, **personal safety** concerns—especially when it comes to the **homeless** population and crime—lack of **affordable housing**, adding **basic amenities** beginning with a grocery store and gas station, and building the amenities that make the district more **family-friendly**. These improvements will expand the populations of potential residents that will help further diversify the district.
- Challenges in general for building up worker satisfaction include **capitalizing on the outdoor space, having more events, bringing new restaurants, continuing to make the district pedestrian and bike friendly, and addressing safety concerns particularly as they relate to workers safely being able to get between their office and personal vehicle**.



# Ybor District Residents



Residents

# Assets

# Weaknesses

Nightlife/Bars  
 Small Businesses  
 Community  
 Walkability/Location  
 Diversity/History  
 Chickens Trolley  
 Restaurants  
 Things to do

Negative Public Perception  
 Lack of Housing  
 Diversity in Food Options  
 Homelessness Transportation Things to do  
 Retail Diversity History Chickens  
 Safety Noise Stadium  
 Parking/Traffic  
 Cleanliness

# Expectation Gaps

There are specific topics for which residents indicate their expectations being met, and those where there are gaps between their expectation and experience.

- The smallest expectation gaps were expressed for:
  - *Things to do*
  - *Affordable housing options*
  - *Quality housing options*
- Largest expectation gaps:
  - *Public area cleanliness*
  - *Good parking accessibility*
  - *Convenient shopping/retail hours of operation*

**Note:** Expectation gaps were smaller in 2018 than in 2016 for the following topics:

- *Strong sense of personal safety*
- *Incoming/outgoing traffic flow*
- *Diversity in shopping/retail options*
- *Quality housing options*
- *In-town traffic circulation*

## 2018 Expectation Gaps





# Expectation Gaps

## The top five expectations being met:



Things to Do



Affordable Housing Options



Quality Housing Options



Festivals and Events



Incoming/Outgoing Traffic Flow

## The top five expectation gaps:



Public Area Cleanliness



Good Parking Accessibility



Convenient Shopping/  
Retail Hours of Operation



Diversity in Food/Beverage Options



Affordable Parking

# Motivating Factors

## Top factors that motivated current residents to move to Ybor included:

- *Experience the urban lifestyle*
- *Restaurants*
- *Arts/Entertainment*

## Weakest motivators were:

- *Retail shops*
- *Security/Safety*
- *Personal services*

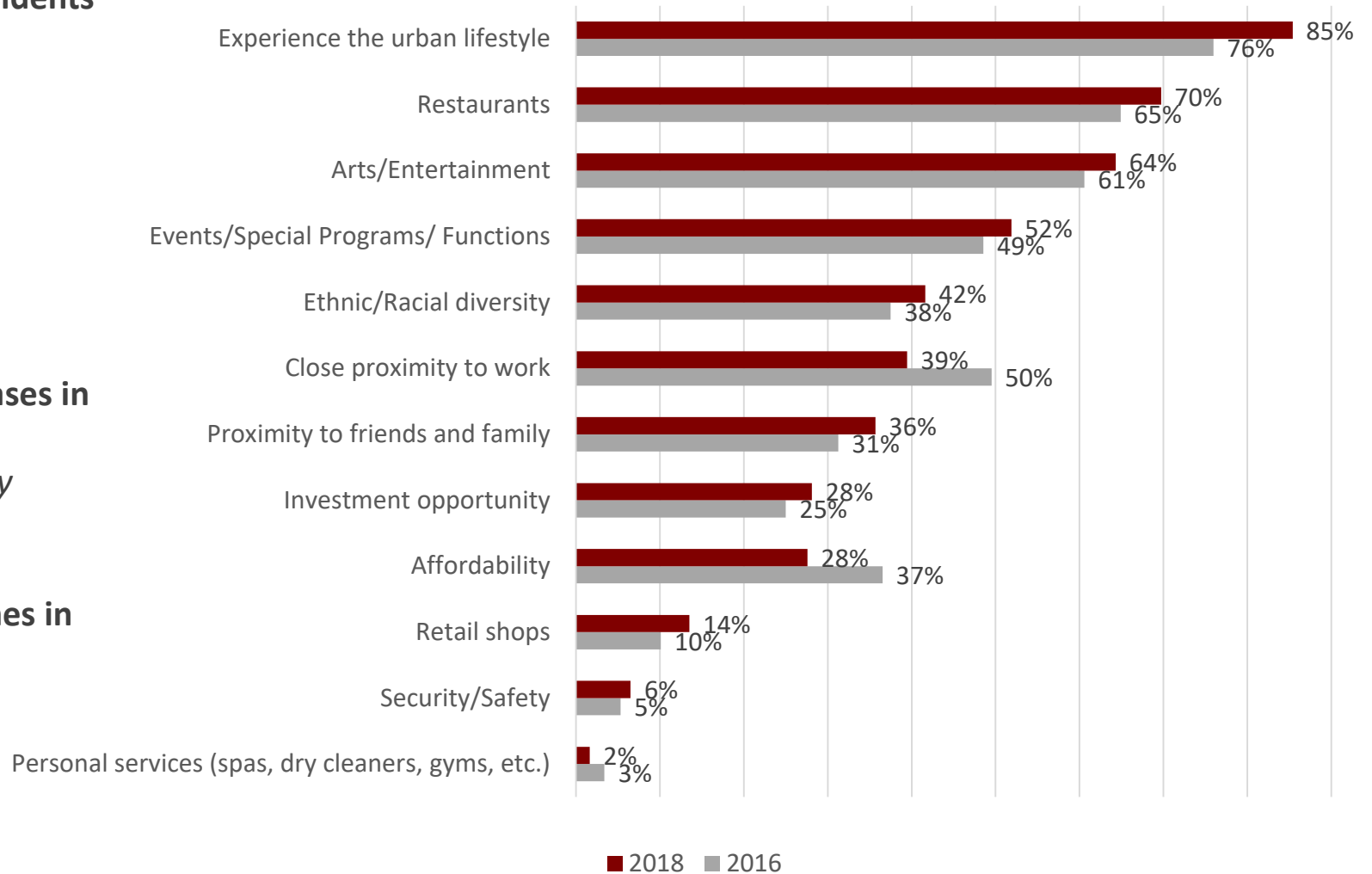
## There were significant two year increases in the following as motivating factors:

- *Proximity to friends and family*
- *Experience the urban lifestyle*
- *Restaurants*

## There were significant two year declines in the following as motivating factors:

- *Affordability*
- *Close proximity to work*

Select any factors that motivated your decision to live in Ybor City.

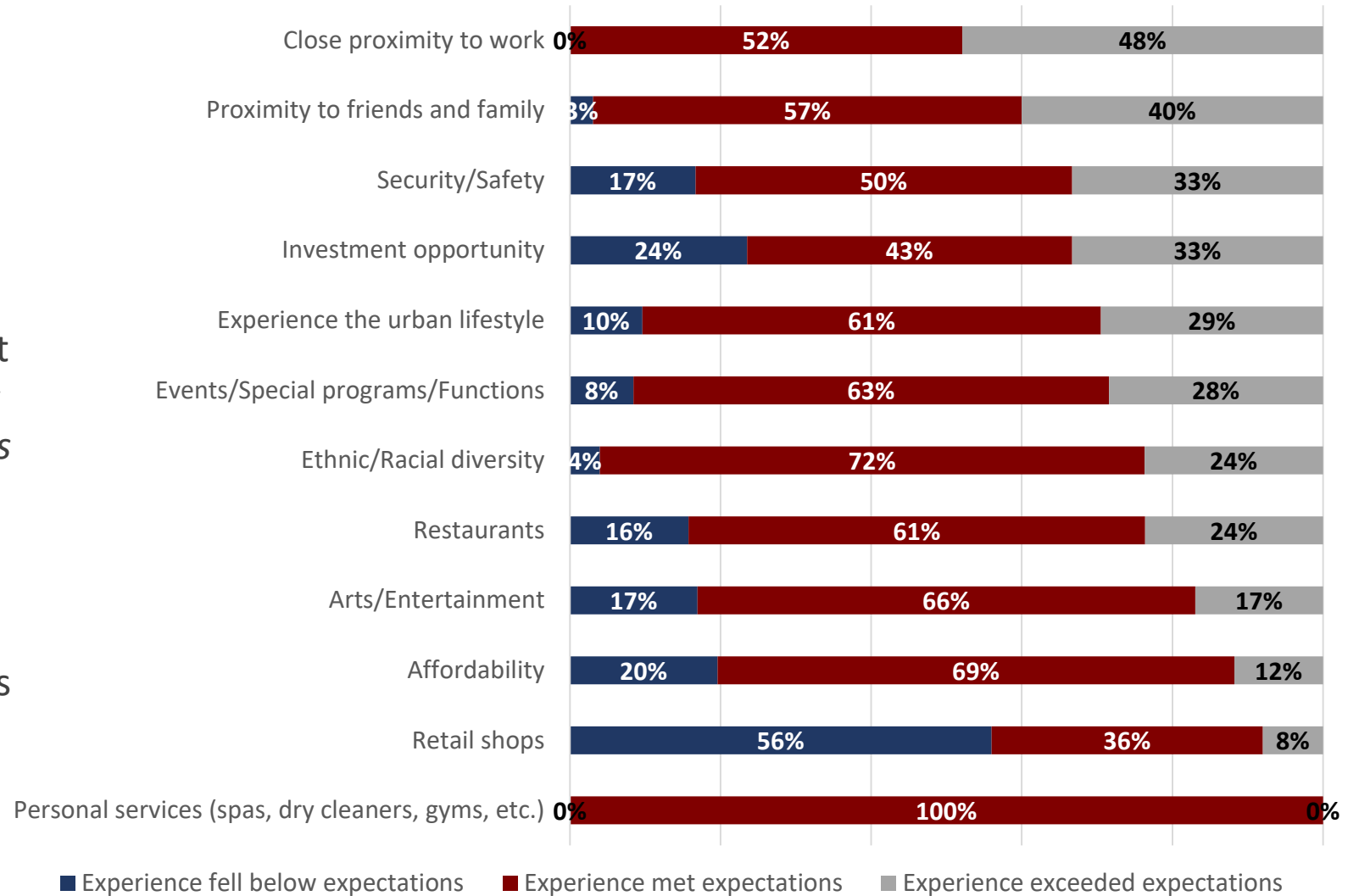


# Experience Upon Living in Ybor

Residents who provided their motivating factors for moving to Ybor noted whether upon moving, their experience exceeded, met or fell below their expectations.














- Topics exceeding expectations to the greatest extent were *close proximity to work, proximity to friends and family and security/safety*.
- Topics that received the greatest below expectations ratings were *retail shops, investment opportunity and affordability*.

After living in Ybor, has your experience fallen below, met or exceeded expectations?



# District Priorities

Half or more residents place high priority on the district working on the following:

 Patrolling Officers	89%	 Open Spaces for Outdoor Recreation	73%
 Enhanced Lighting	81%	 Retail	71%
 Security Cameras	77%	 Bike Paths	69%
 Residential Housing	77%	 Walking Trails	66%
 Outdoor Events	76%	 Dog Parks	61%
 Extended Hours of TECO Streetcar Operation	74%	 Concerts	57%
		 Urgent Care/Physician Services	53%


**Note:** Priority placed on walking trails, dog parks, and urgent care/physician services significantly increased over the past two years.

# Unavailable in Ybor City

**3 in 10 (30%) or more are leaving 5+ times a month**

 Grocery Store **71%**

 Casual Dining Restaurants **30%**


 Health Clubs/Gyms **41%**


**Note:** *Significantly more residents are leaving the district for pharmacies/drug stores than two years ago.*


**Half of residents leave 2+ times a month**

 Grocery Store **98%**


 Casual Dining Restaurants **82%**


 Pharmacies/Drug Stores **72%**

 Clothing Stores/Boutiques **64%**

 Convenience Stores **56%**

 Coffee Shops/Cafes **52%**

 Health Clubs/Gyms **51%**

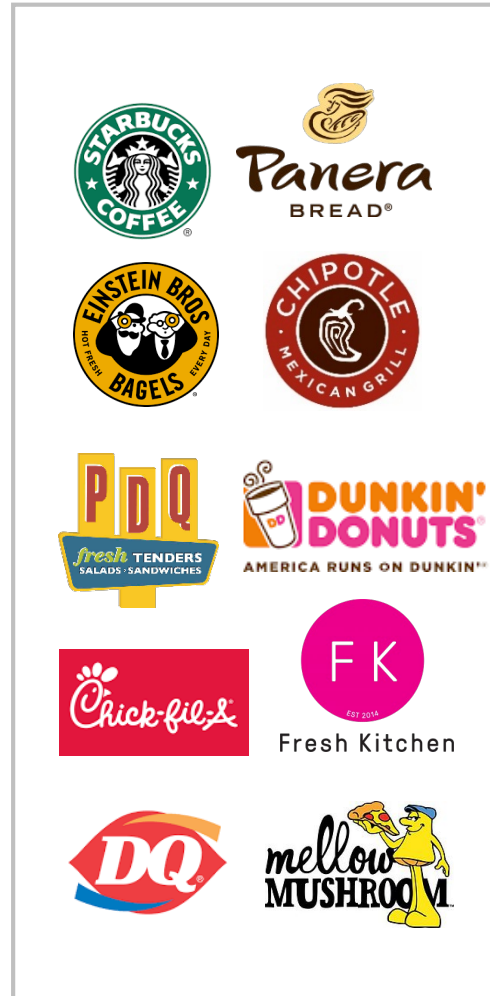
 Fine Dining Restaurants **49%**

# Requested Additions

## Grocery Store:



## Restaurants:



## Pharmacy/Convenient Store:



## Personal Services:

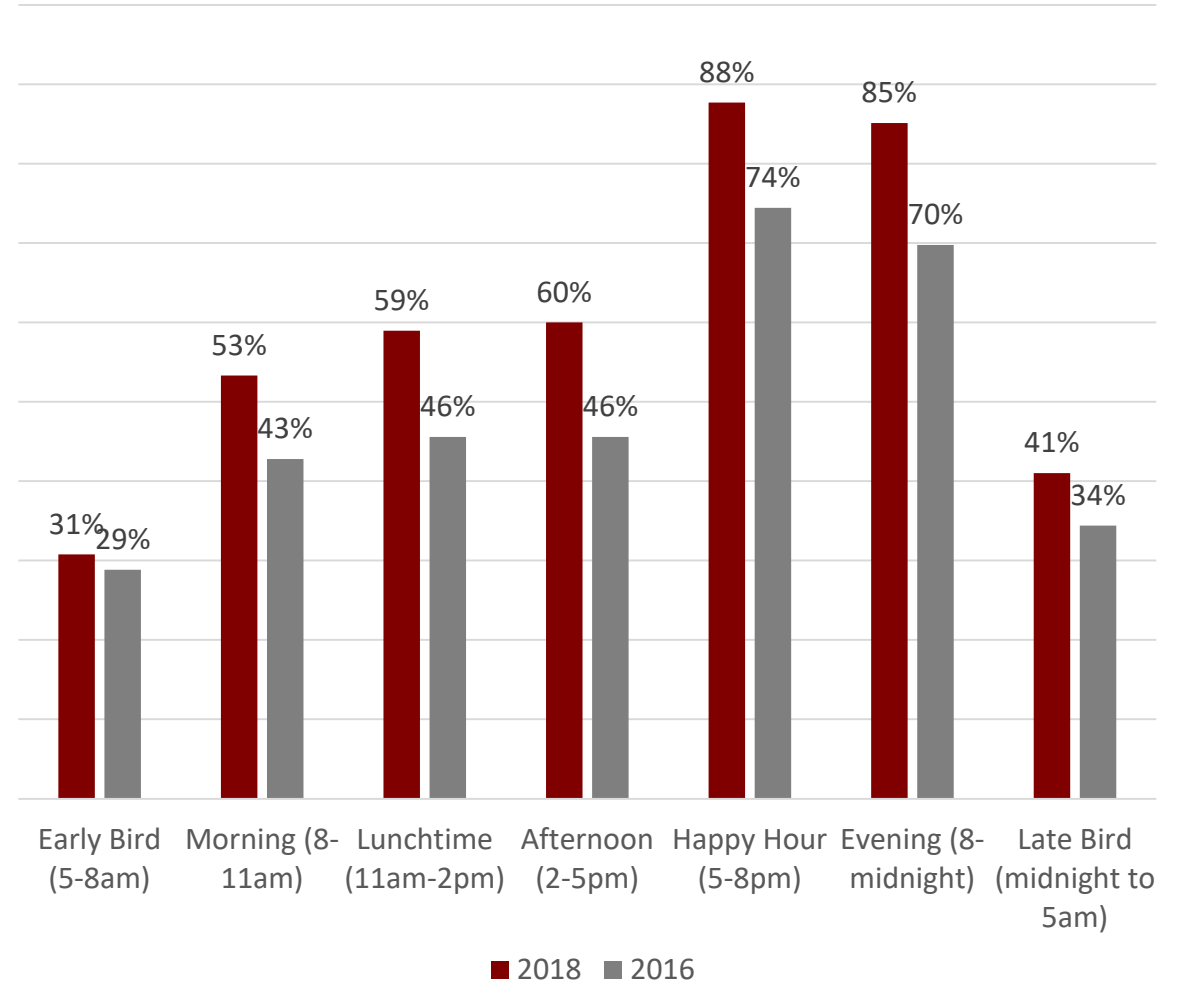
Requests for personal services were less frequent than retailers but examples included nail salons, dry cleaners, and gyms.

# Time within the District

**The diversity of Ybor’s residents is evident when looking at the times of day they are active within the district.**











- More than half of the residents are active in morning and lunchtime hours, ramping up in the afternoon and reaching peak during happy hour and evening.
- In 2018, residents are significantly more active at all times of the day than in 2016 with the exception of *Early Bird* hours.
  - An increased presence during traditional work hours indicates more residents are likely working in the district than two years ago and/or more of the residents hold non-traditional schedules.
  - “Spikes” in presence during *happy hour* (+19%) and *evening hours* (+21%) indicates an immediate return to Ybor after work to spend leisure time in the district for those commuting outside.

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







# Transportation

*When, if ever, do you use the following modes in Ybor City?*

	Weekdays	Weekends
 Travel By Foot	88%	92%
 Personal Car	87%	75%
 TECO Line Streetcar	29%	67%
 Uber/Lyft	29%	66%
 Personal Bicycle	26%	45%
 Friend's Vehicle	14%	28%
 Rental Bikes	5%	17%
 Motorcycle/Scooter	6%	5%
 Taxi	3%	8%
 HART Bus Service	5%	5%

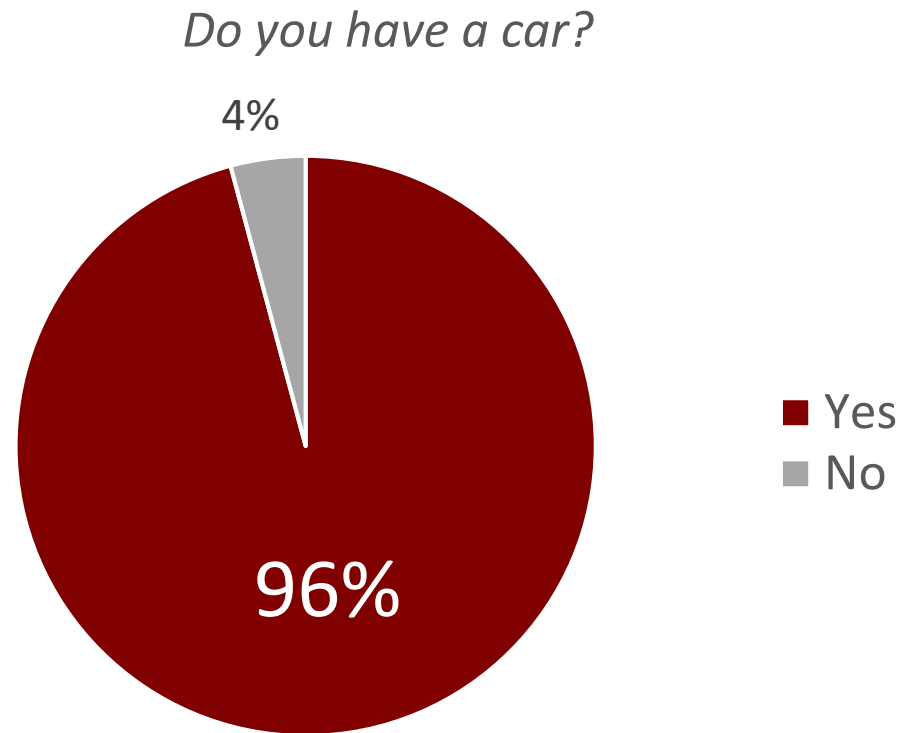
*Select which modes of transportation you would utilize if made available in Ybor.*

	District Circulator	64%
	Personal Golf Cart	50%
	Limousine	6%
	Other	21%



# Transportation

- A majority of residents (96%) own a car.

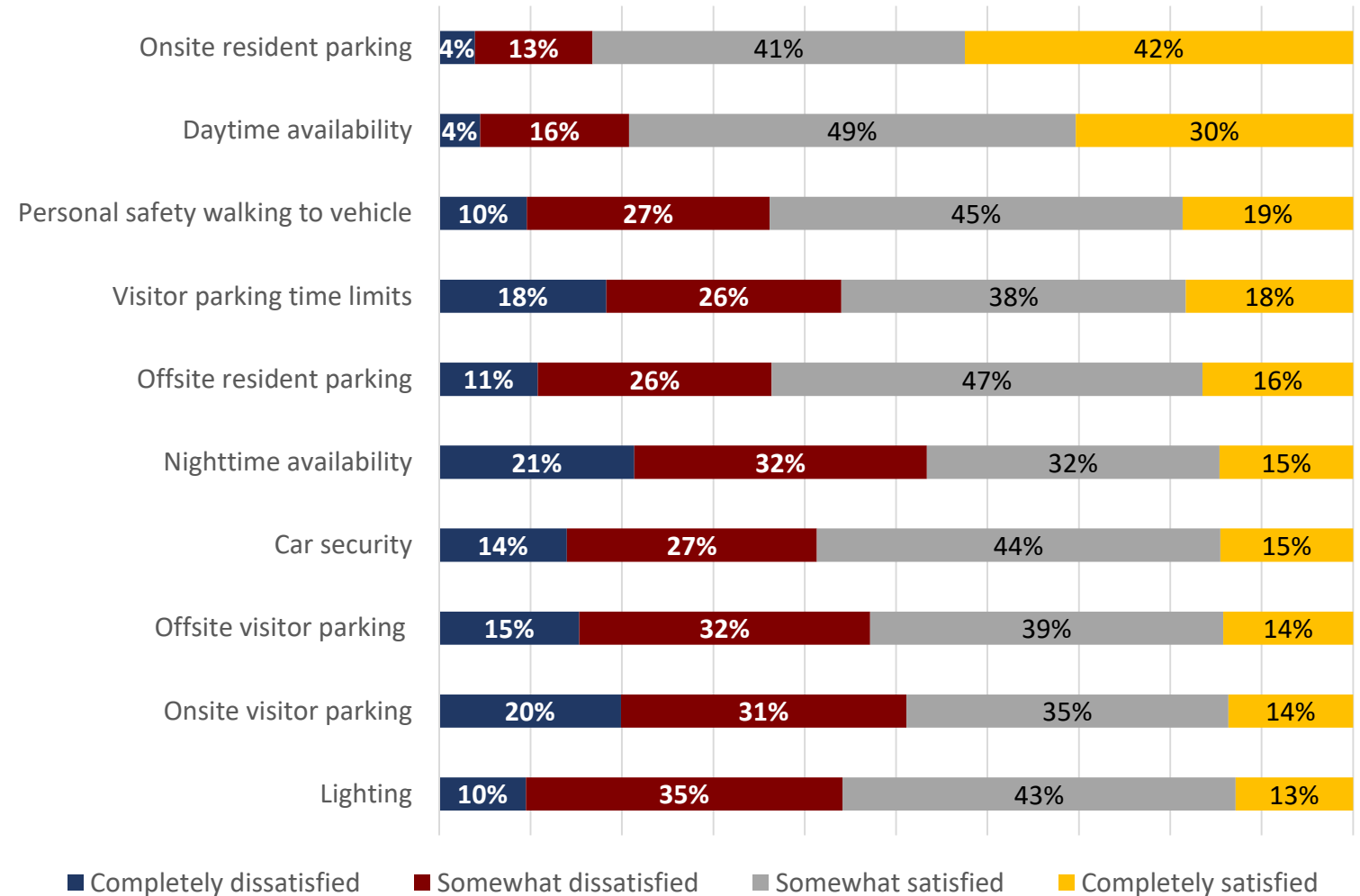


# Parking

Residents were more satisfied than dissatisfied with a majority of the parking topics.

- Top areas of overall parking satisfaction were
  - *Onsite resident parking* (83%)
  - *Daytime availability* (79%)
  - *Personal safety walking to vehicle* (64%)
- Top areas of overall parking dissatisfaction were:
  - *Nighttime availability* (53%)
  - *Onsite visitor parking* (51%)
  - *Offsite visitor parking* (47%)

How satisfied are you with the following aspects of parking in Ybor City?

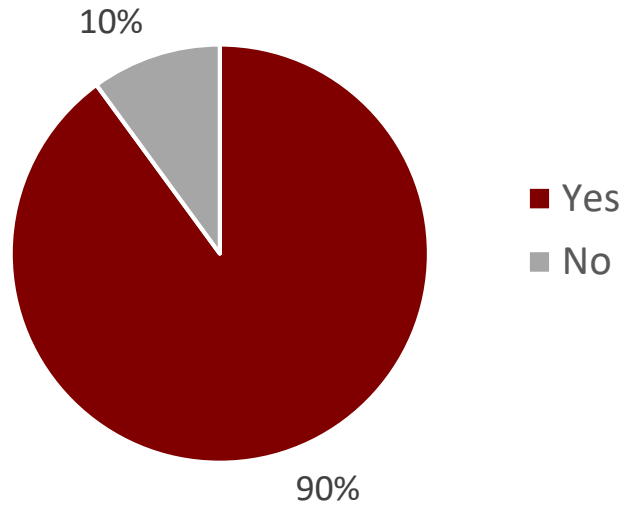


# Employment

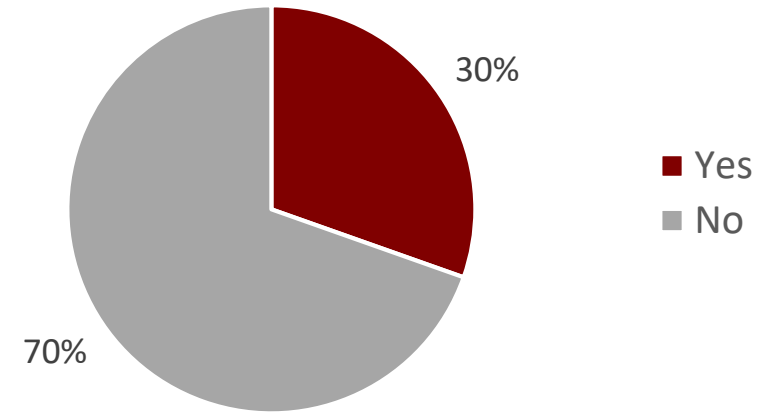
**For a number of residents, Ybor is their live, work, play destination.**

- A majority of residents (90%) are employed and of that group, 3 in 10 work in Ybor.

*Are you employed?*

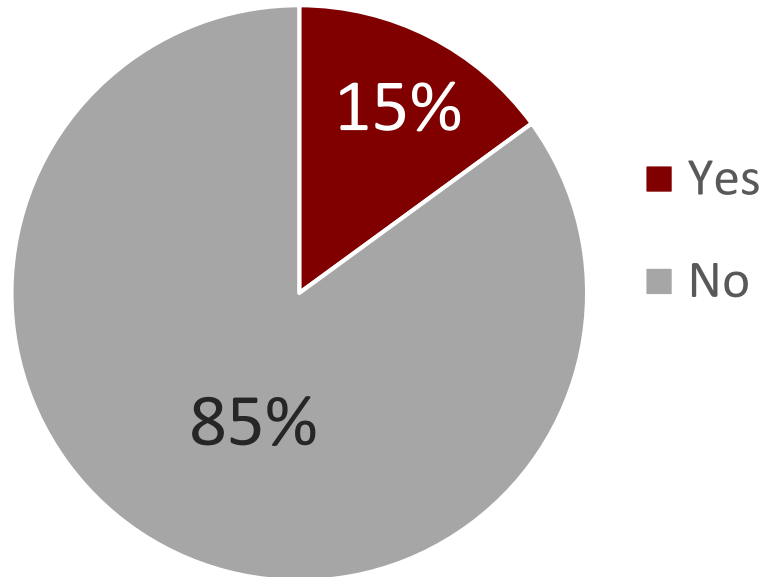


*Is your employer located in Ybor?*



# Business Owners

*Are you a business owner in Ybor City?*



**Business owners that are also residents in Ybor were posed with two open-ended questions to give feedback on:**

- *What ideas do you have to activate Ybor City during the summer?*
  - Family-friendly– shift away from bars
  - Community events/art events/live music
  - Think of things to avoid rain and heat
- *Do you have any feedback regarding your experience as a business owner in Ybor to share with the City?*
  - Homeless concerns/cleanliness

# Sentiments in Ybor City

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

	2018	2016
Extremely satisfied	<b>40%</b>	36%
Somewhat satisfied	<b>45%</b>	54%
Neutral	<b>9%</b>	5%
Somewhat dissatisfied	<b>6%</b>	3%
Extremely dissatisfied	<b>1%</b>	0%



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

	2018	2016
Definitely likely	<b>42%</b>	38%
Likely	<b>38%</b>	34%
Somewhat likely	<b>13%</b>	19%
Somewhat unlikely	<b>4%</b>	5%
Unlikely	<b>2%</b>	2%
Definitely unlikely	<b>1%</b>	1%

# Demographics



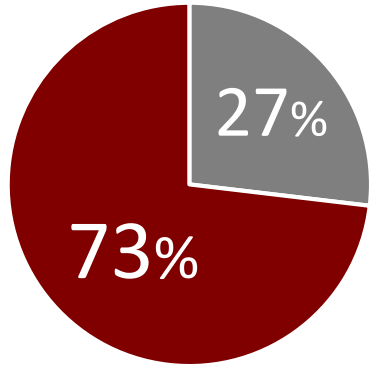
- The profile of the Ybor residents is as follows:
  - Skews male (55%)
  - Largely Gen X (47%), followed by Millennials (34%)
  - Close to 1 in 3 HHI \$100k+
  - 3 in 5 are single
  - 7% have children
- Over the past two years, residential inventory significantly increased within the district. The demographics have shifted over the past year, likely as a result, reflecting more males, a higher income, more singles and fewer households with children.

Gender		
	2018	2016
Male	56%	46%
Female	44%	54%
Age Range		
	2018	2016
Under 25	3%	3%
25 to 34	31%	33%
35 to 44	27%	30%
45 to 54	20%	18%
55 to 64	15%	12%
65+	5%	4%
Household income		
	2018	2016
Under \$35,000	8%	11%
\$35,000 to \$49,999	18%	21%
\$50,000 to \$99,999	43%	37%
\$100,000 to \$149,999	19%	16%
\$150,000 to \$199,999	5%	7%
\$200,000 to \$249,999	3%	5%
\$250,000 or more	4%	3%


Employment		
	2018	2016
Yes	90%	9%
No	10%	8%
Marital Status		
	2018	2016
Married	23%	30%
Single	65%	59%
Divorced/Separated/Widowed	13%	11%
Children		
	2018	2016
Yes	7%	13%
No	93%	87%
Pets		
	2018	2016
Dogs	24%	38%
Cats	20%	25%

# Residence Type

Residents reside largely in rented non-single family dwellings.



 Condo/  
Townhome/  
Apartment

 Single Family  
Home

Renting has decreased since 2016

57%  
2016

51%  
2018



**95%** of **owners** do not appear to be making their property available through third-party lodging sites



**84%** of **renters** have an interest in owning a residence in Ybor



*Renters reported "reasonable" mortgage payments to be between*

**\$500 - \$2,500 monthly**  
*\$1,460 Average Monthly*

# Summary Notes

There are **positive indications** that **Ybor residents** have a **strong affinity to the district**.

- Residents shared **high levels of satisfaction** and **likelihood of recommending Ybor** as a place to live.
- Renters express **strong interest in owning a residence** in Ybor.
- Top-of-mind comments highlight Ybor's sense of community, history, diversity, walkability and things to do.
- Resident activity is highest from **5pm-midnight** indicating those working outside of the district return immediately after to **spend their leisure time in Ybor**.
- There continues to be **high interest in working in the district** by those currently commuting.

**Cleanliness, parking and services/retail** are the **top three** categories **residents** indicated **least aligning** with their **expectation**.

- **Personal safety** registered as **priority** in various areas of the survey from managing the homeless population, to lighting, to requests for patrolling officers.
- **Public area cleanliness** is tied with perceptions of the **homeless** in the district; concerns have increased since 2016. Business owners name this as an issue and its also seen as one of the **greatest weaknesses of the district**.
- **Retail demands** in the retail space include **grocery, gym/fitness, casual dining, coffee shops/cafes and convenience stores** at **higher end frequencies** and **pharmacies, fine dining, and clothing stores/boutiques** at more **moderate frequencies**.

Though **satisfaction levels are high**, there was a **decline in 2018 levels** versus 2016.

- More prominent in 2018 were mentions of **homelessness and housing affordability**—two factors that respondents rated as **highly important to their overall quality of life**. Cleanliness of public areas is also of primary importance yet expectation gaps were pronounced in 2018.
- Thus, the **four biggest challenges** rising to the surface from the resident results appear to be **safety** (largely addressed via homelessness), **retail** (goods and services), **housing affordability**, and **public area cleanliness**.