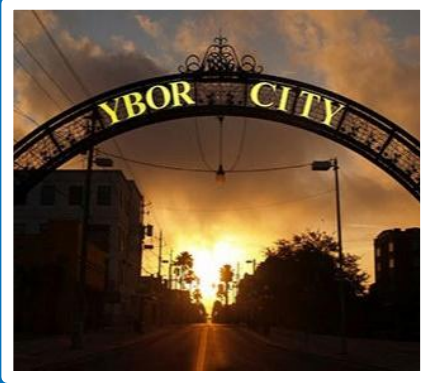


2025 YBOR CITY RESIDENT AND WORKER STUDY RESULTS

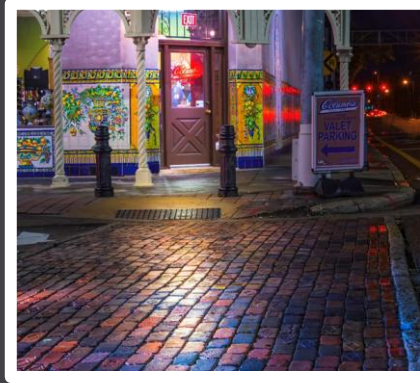


Study Background and Methodology



Study Established in 2016

Established as a baseline study; Occurs biennially and is the 5th iteration of the study



Two online surveys

2025 Resident count: 253

MoE: +/- 5.99%

2025 Worker count: 206

MoE: +/- 6.59%



Study Themes

1. Retail Priorities
2. Mobility and Parking
3. Safety and Cleanliness
4. CRA Program Awareness

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

Residents: Expectation Gaps

Expectation Gaps	2025
Affordable housing options	3.19
Diversity in shopping/retail options	3.12
Public area cleanliness	3.04
Quality housing options	2.63
Strong sense of personal safety	2.23
Car-free transportation options	2.22
Diversity in food/beverage options	2.21
Affordable parking	1.86
Sense of community	1.63
Walkability	1.62
Things to do	1.46
Incoming/outgoing traffic flow	1.46
In-town traffic circulation	1.45
Art-filled streetscapes	1.31
Good parking accessibility	1.21
Festivals and events	0.86

- Residents are **most satisfied with characteristics around community activation.**
 - This includes festivals and events, art-filled streetscapes, and things to do.

- Residents are also **generally satisfied with characteristics around mobility and parking.**
 - This includes good parking accessibility, in-town traffic circulation, and walkability.

- Residents expressed the greatest dissatisfaction with affordable housing options, diversity in shopping/retail options, and public area cleanliness.

***Orange** = Safety and Security **Teal** = Mobility and Parking
Grey = Community Activation **Green** = Retail Options

Workers: Expectation Gaps

Expectation Gap	2025
Affordable parking	4.15
Strong sense of personal safety	3.59
Good parking accessibility	3.09
Public area cleanliness	2.96
Incoming/outgoing traffic flow	2.28
Diversity in food/beverage options	2.24
In-town traffic circulation	2.18
Affordable housing options	2.15
Diversity in shopping/retail options	2.11
Things to do	2.02
Quality housing options	1.87
Sense of community	1.79
Car-free transportation options	1.62
Walkability	1.46
Art-filled streetscapes	1.16
Festivals and events	1.14

- Workers are **generally most satisfied with community activation characteristics**.
 - This includes festivals and events, art-filled streetscapes, and the sense of community.

- Workers **have mixed feelings about mobility and parking** in Ybor City.
 - Generally satisfied with walkability and car-free transit options.
 - Not satisfied with traffic and parking.

- The largest expectation gaps for workers are...
 - 1) Affordable parking (4.15)
 - 2) Strong sense of personal safety (3.59)
 - 3) Good parking accessibility (3.09)

***Orange** = Safety and Security **Teal** = Mobility and Parking
Grey = Community Activation **Green** = Retail Options

Residents: Trending Expectation Gaps

Residents: Top 5 Trending Expectation Gaps

Rank	2016	2018	2021	2023	2025
1	Strong sense of personal safety (3.46)	Strong sense of personal safety (2.92)	Public area cleanliness (2.31)	Public area cleanliness (2.02)	Affordable housing options (3.19)
2	Incoming/outgoing traffic flow (3.09)	Public area cleanliness (2.76)	Strong sense of personal safety (2.16)	Strong sense of personal safety (1.97)	Diversity in shopping/retail options (3.12)
3	Diversity in shopping/retail options (2.75)	Diversity in shopping/retail options (2.29)	Quality housing options (1.45)	Affordable housing options (1.63)	Public area cleanliness (3.04)
4	In-town traffic circulation (2.59)	Quality housing options (2.24)	Diversity in shopping/retail options (1.38)	Quality housing options (1.60)	Quality housing options (2.63)
5	Quality housing options (2.28)	Diversity in food/beverage options (1.89)	Walkability (1.23)	Diversity in shopping/retail options (1.49)	Strong sense of personal safety (2.23)

- In general, the size of expectation gaps increased from 2023 to 2025.
- The top 5 characteristics remained the same between the two studies, but the order notably changed.
 - Affordable housing moved to the number one spot in 2025
 - Public area cleanliness moved from the largest gap in 2021 and 2023 to the 3rd largest in 2025.
 - Strong sense of personal safety has declined from the 2nd largest expectation gap (2021, 2023) to the 5th largest gap.

Workers: Trending Expectation Gaps

Workers: Top 5 Trending Expectation Gaps

Rank	2016	2018	2021	2023	2025
1	Strong sense of personal safety (3.75)	Strong sense of personal safety (3.53)	Strong sense of personal safety (3.64)	Strong sense of personal safety (3.39)	Affordable parking (4.15)
2	Incoming/outgoing traffic flow (2.52)	Public area cleanliness (2.92)	Public area cleanliness (3.32)	Public area cleanliness (3.36)	Strong sense of personal safety (3.59)
3	Good parking accessibility (2.37)	Affordable parking (2.13)	Good parking accessibility (2.01)	Affordable parking (3.21)	Good parking accessibility (3.09)
4	In-town traffic circulation (2.01)	Good parking accessibility (2.08)	Affordable parking (1.82)	Good parking accessibility (2.72)	Public area cleanliness (2.96)
5	Affordable parking (1.76)	Incoming/outgoing traffic flow (1.80)	Diversity in food/beverage options (1.62)	Diversity in food/beverage options (2.24)	Incoming/outgoing traffic flow (2.28)

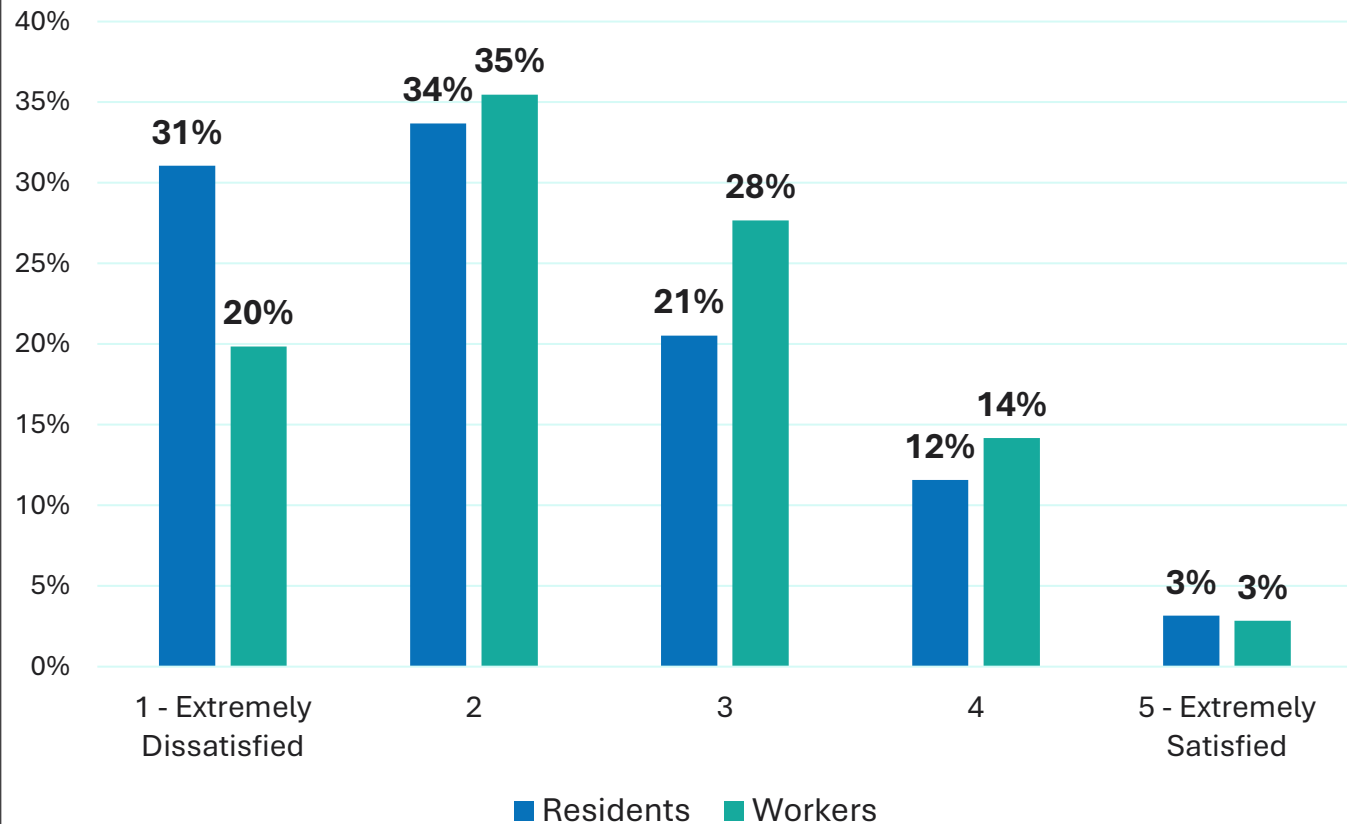
- In general, workers have expressed the greatest dissatisfaction with parking, safety, and cleanliness over the last 4 studies
- 2025 was the first time that “strong sense of personal safety” was not the highest expectation gap for workers.
 - Affordable parking became the most dissatisfied characteristic with working in Ybor, rising 2 spots from 2023 to 2025.

Retail Priorities and Perceptions

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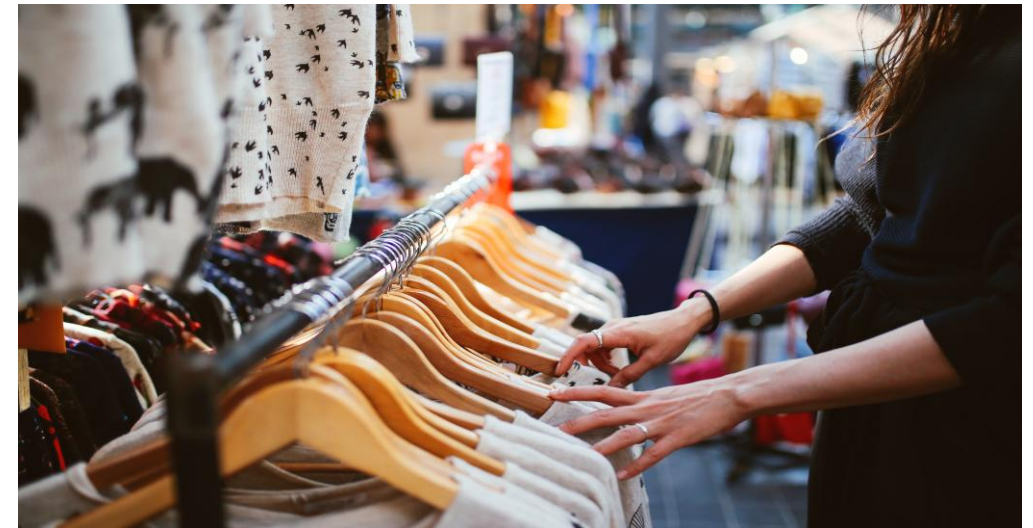
Retail Availability Perceptions

Overall, how satisfied are you with the retail shopping experience in Ybor City today?



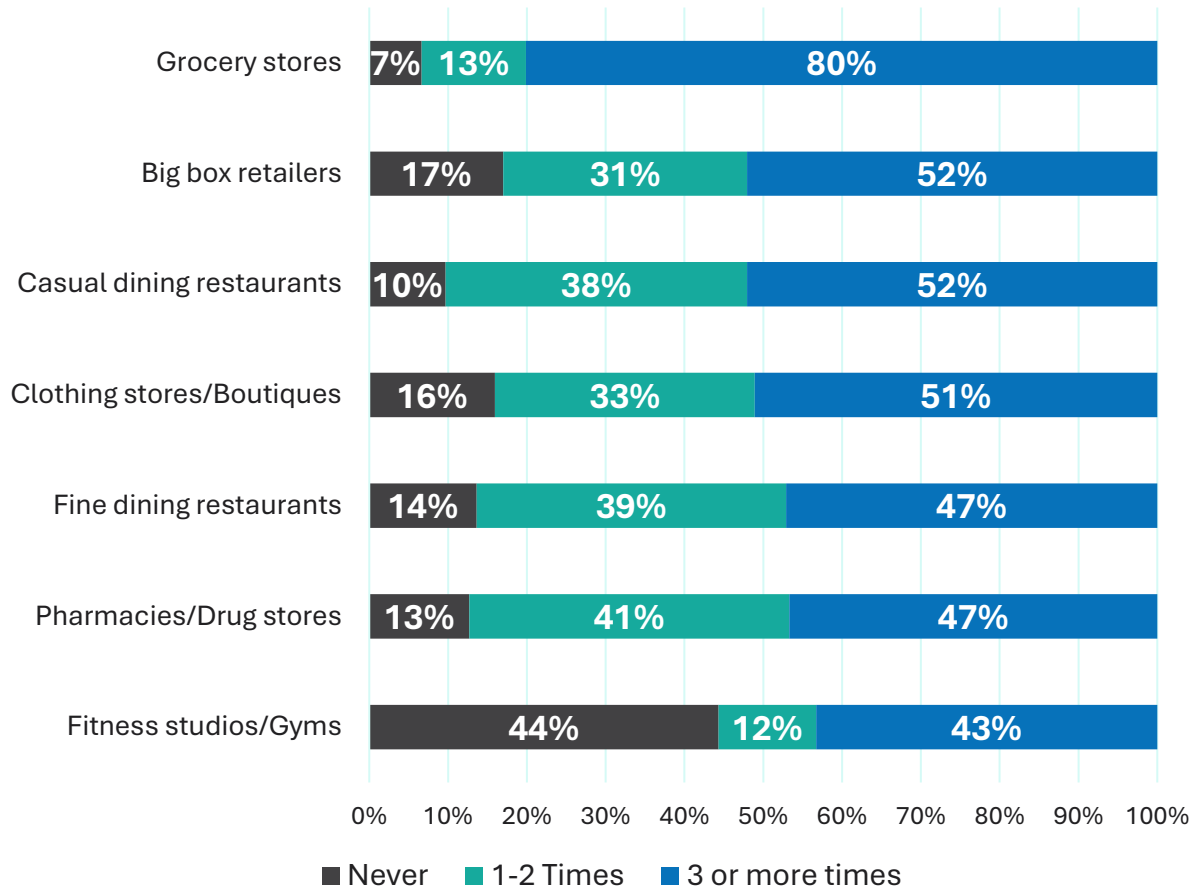
Residents and workers are largely dissatisfied with the retail shopping experience in Ybor City.

- Only 15 percent of residents and 17 percent of workers explicitly state they are satisfied, to some degree, with retail shopping in the district.



Leaving the District

Residents Top 7: In a typical month, how often are you leaving Ybor City for any of the following?



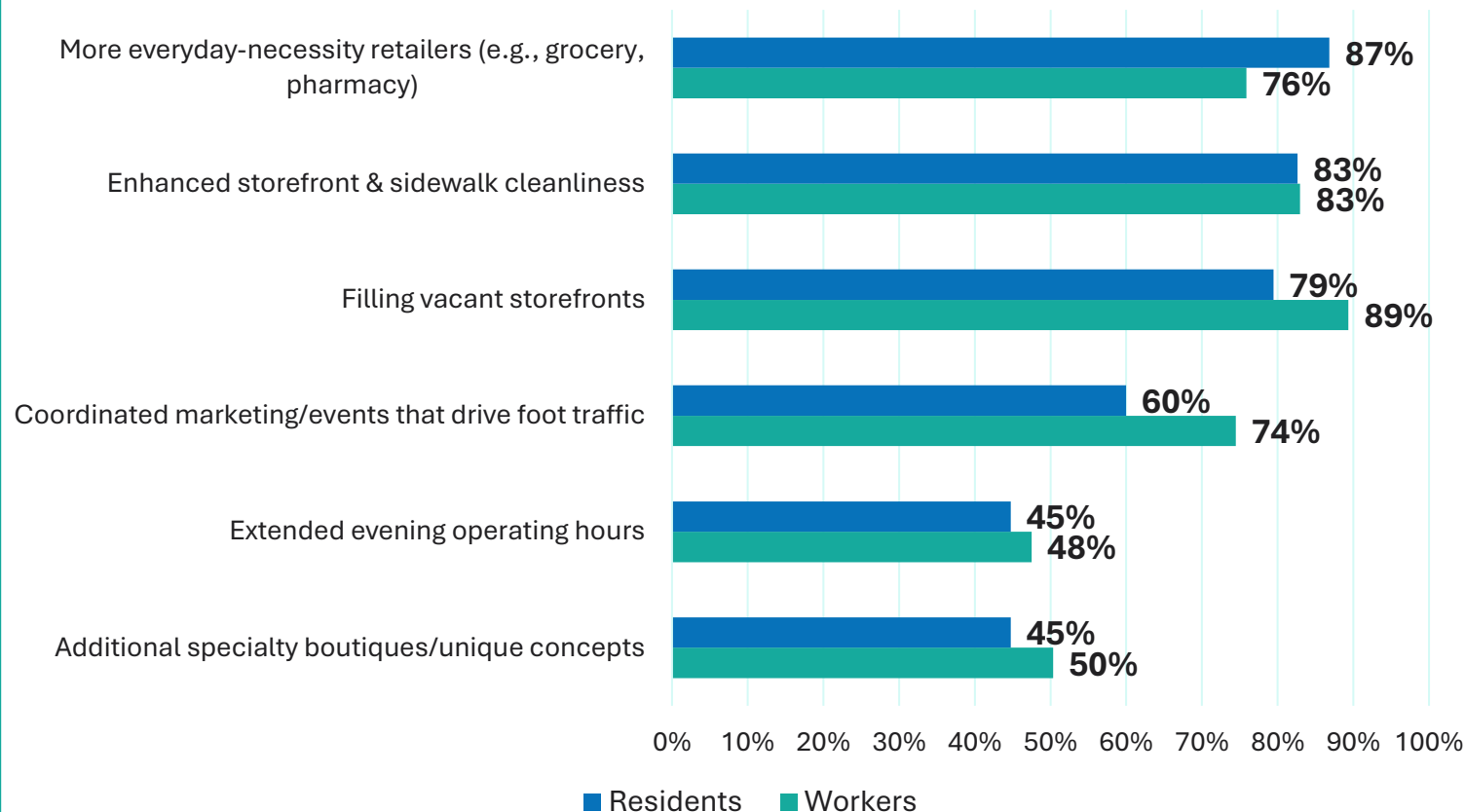
Residents continue to cite grocery stores as the store that they most often need to leave the district to access.

80 percent of residents note that they **leave the district** 3 times or more a month **to visit a grocery store.**

- Other common retail or dining options that residents often leave the district for are **big box retailers** (52%), **casual dining restaurants** (52%), and **clothing stores/boutiques** (51%).

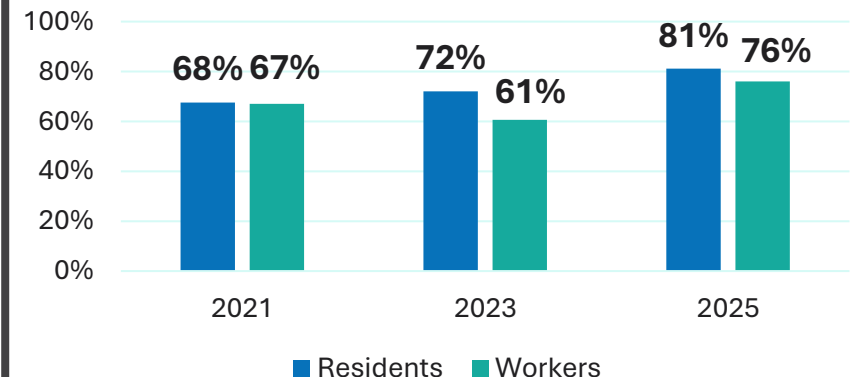
Retail Priorities

How important are the following retail improvements to you?:
High and Very High



- **Residents desire more everyday-necessity retailers**, like a grocery store or pharmacy.
 - Other top priorities for residents and workers include enhancing storefronts and sidewalk cleanliness and filling vacant storefronts.

Trending: Priority of recruiting retail businesses into the district.:
High Priority or Very High Priority



Safety and Cleanliness

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Safety and Security



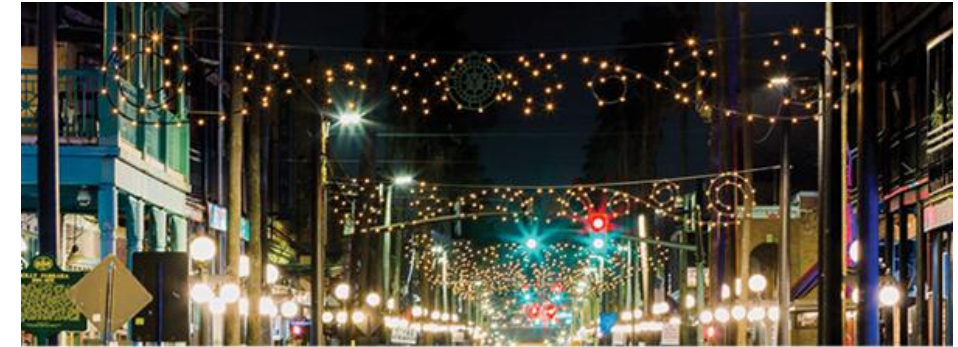
64 percent of residents are satisfied, to some degree, with personal safety when walking to their vehicle.

- This finding is virtually identical to that of previous studies (2021, 2023), which reported that 66 percent of participants were satisfied with their personal safety while walking to their vehicle.

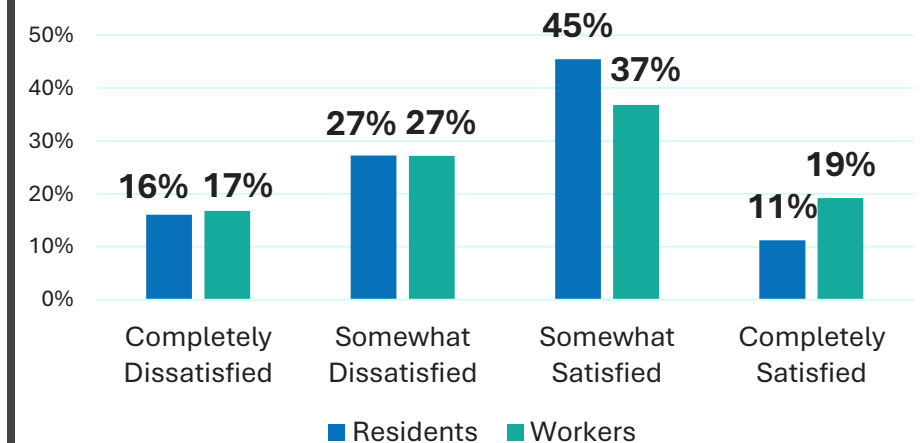


In 2025, 57 percent of workers are satisfied, to some degree, with personal safety when walking to their vehicle.

- This finding is also nearly identical to that of 2021 and 2023, when 56 percent and 54 percent, respectively, reported being satisfied with their perceived personal safety when walking to their vehicle.



How satisfied are you with the following aspects of parking in Ybor City?:
Lighting/security of parking areas



Safety and Security Priorities



- 71 percent of residents and 69 percent of workers believe enhanced lighting should be prioritized in the district.



- 70 percent of residents and 69 percent of workers believe security cameras should be prioritized in the district.



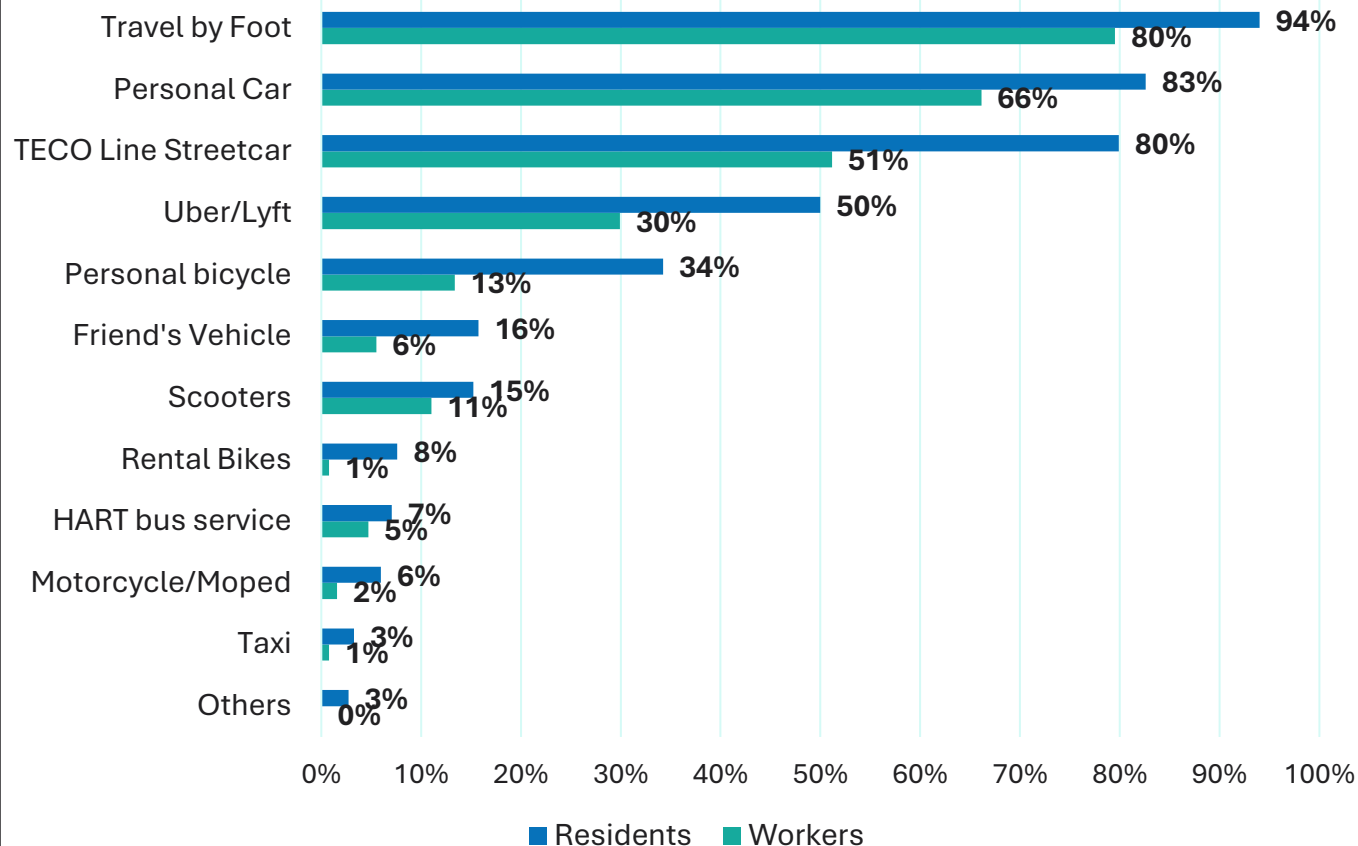
- 69 percent of residents and 71 percent of workers believe patrolling officers should be prioritized in the district.

Mobility and Parking

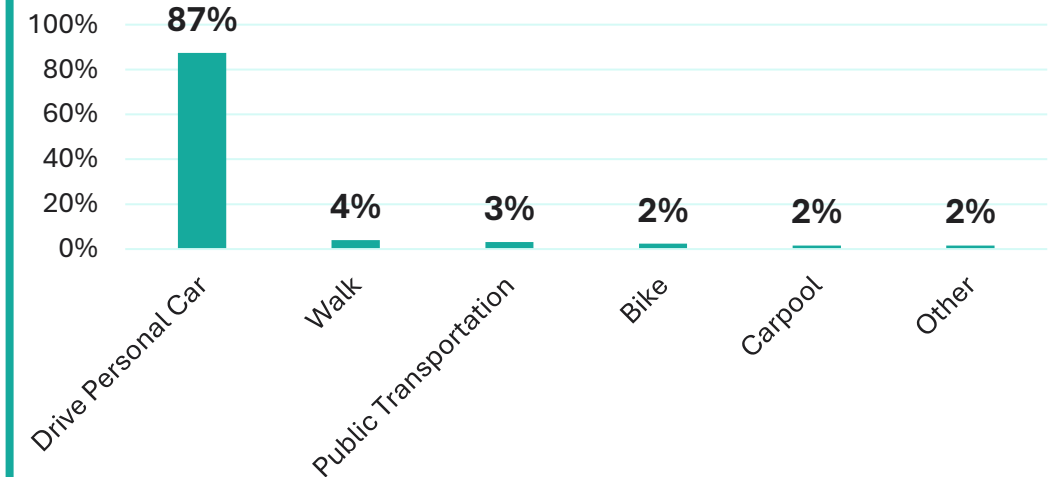
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Getting Around Ybor City

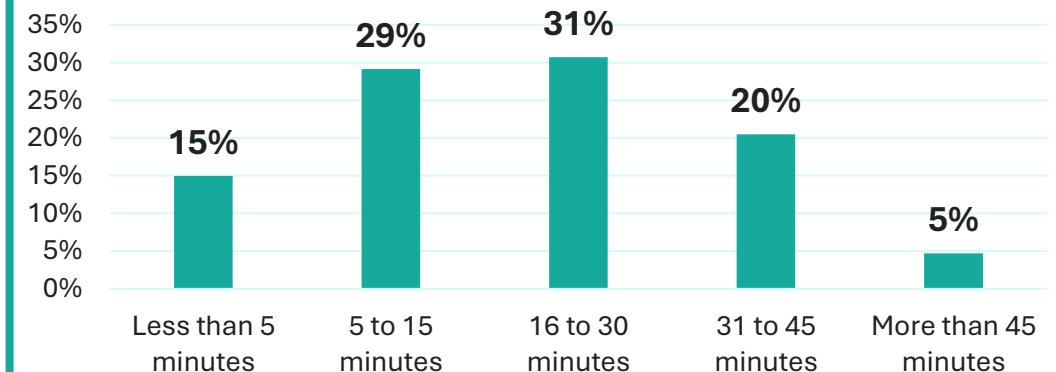
Which of the following modes of transportation do you use within Ybor City?



Workers: How do you normally commute to work?



Workers: How long is your commute to work?

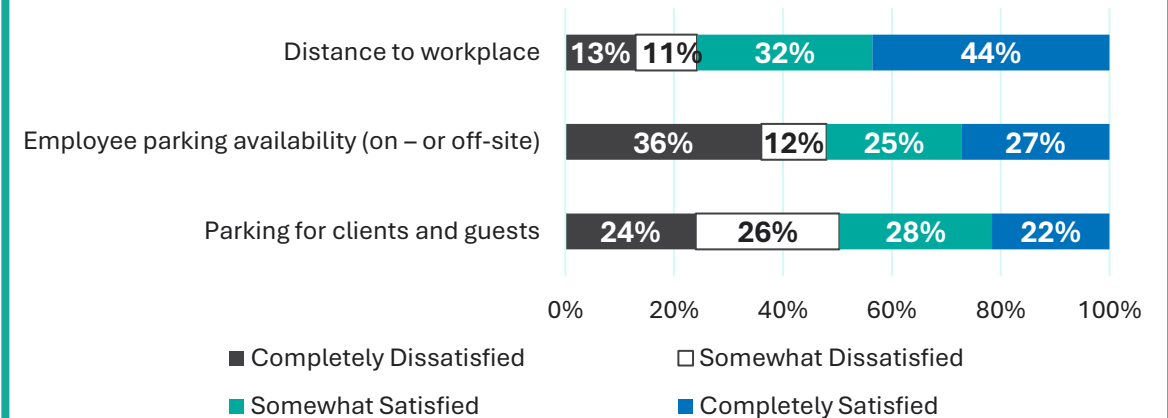


Workers: Parking

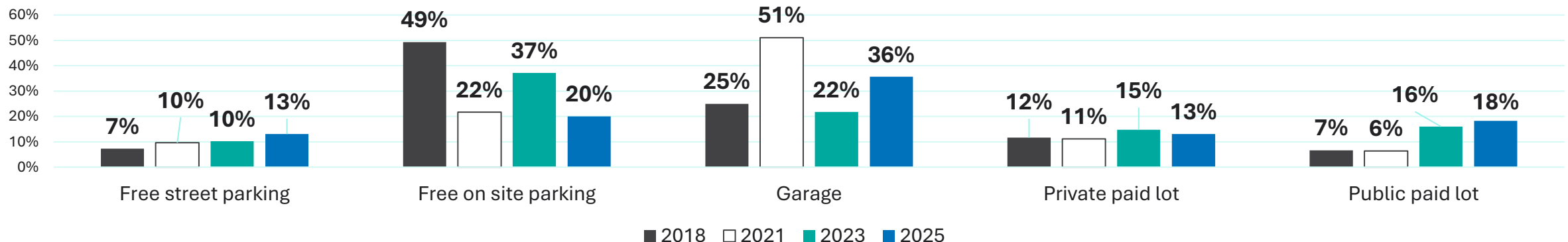
- Workers are most satisfied with the distance to their workplace from parking locations.
 - However, they are more divided on availability and parking for clients and guests.



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

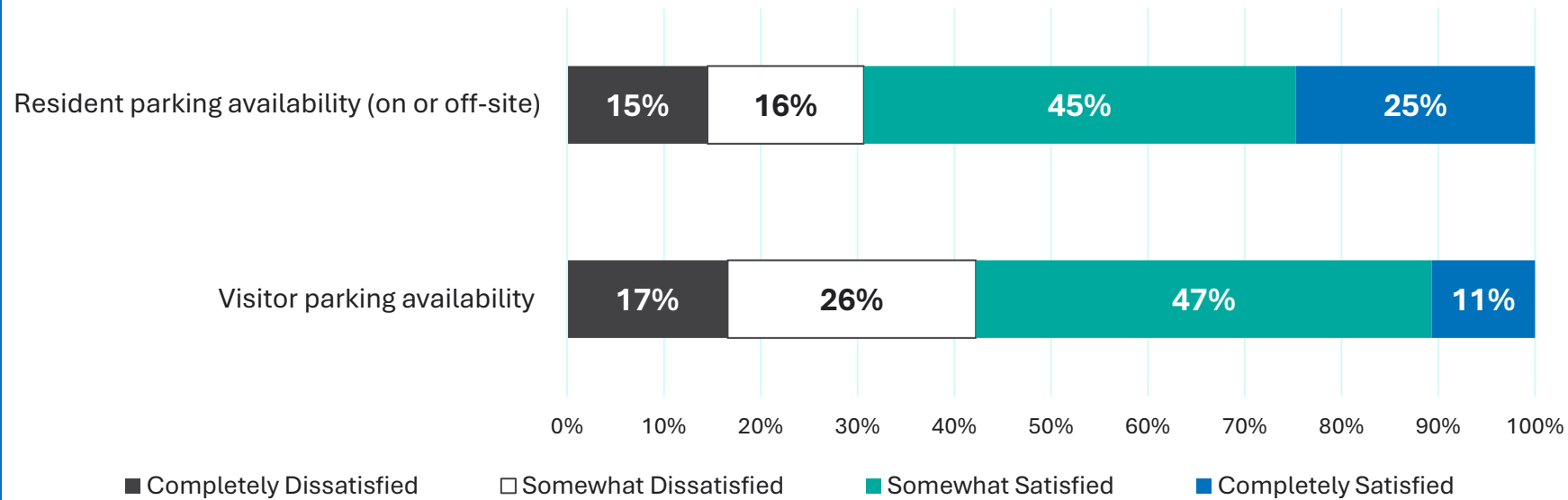


Workers Trending: Where do you typically park?



Residents: Parking

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



Residents are generally **satisfied** with **parking availability**.

- 70 percent are satisfied, to some degree, with resident parking availability.
- 58 percent are satisfied, to some degree, with visitor parking availability

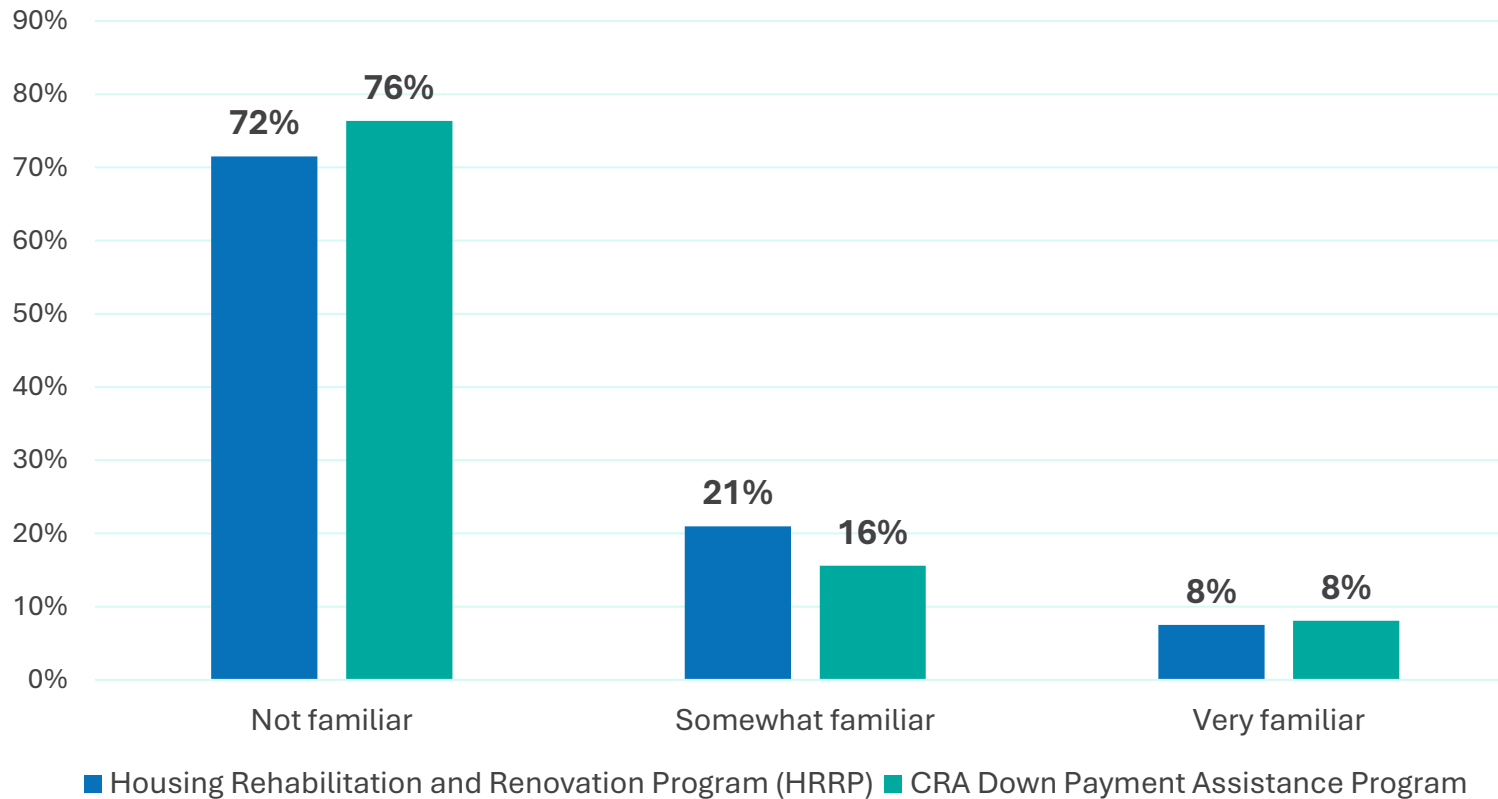


CRA Program Awareness

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CRA Housing Program Awareness

How aware are you of the following Tampa CRA housing programs?



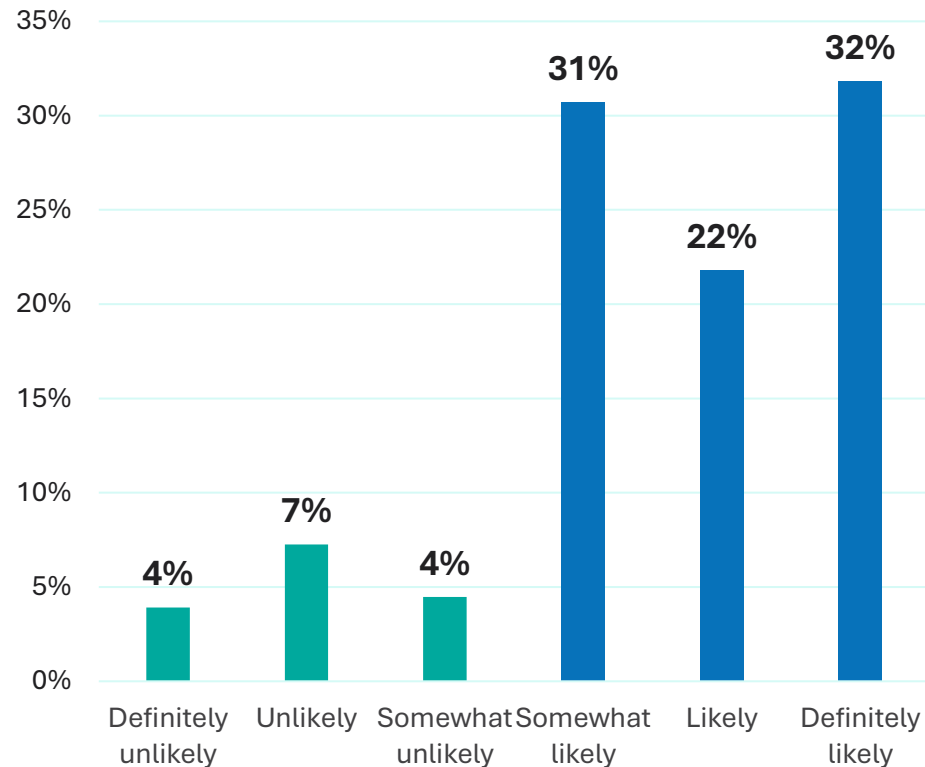
3 in 4 residents are “not familiar” with the Housing Rehabilitation and Renovation Program (HRRP) and the CRA Down Payment Assistance Program.

- Only 8 percent of residents indicated they are “very familiar” with either program.

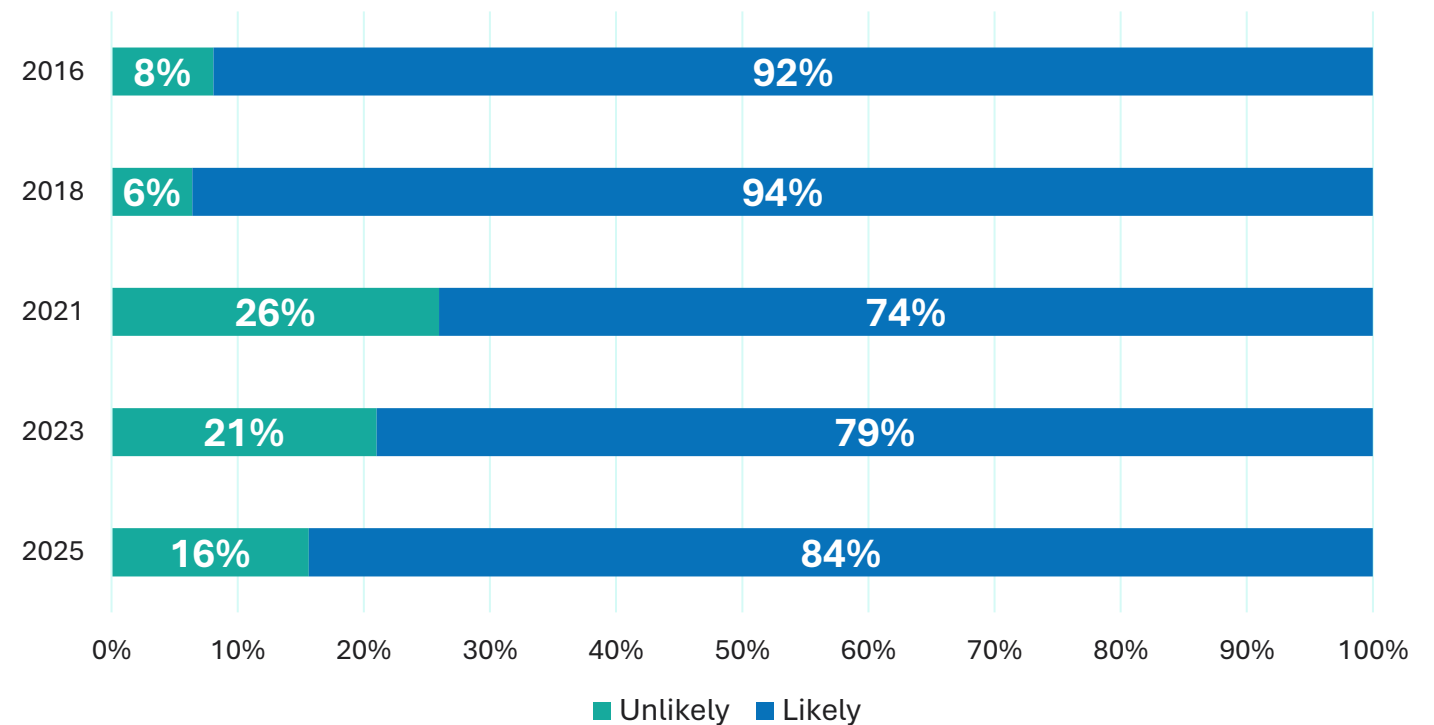
Recommending Ybor City

Resident: Recommending Ybor City

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

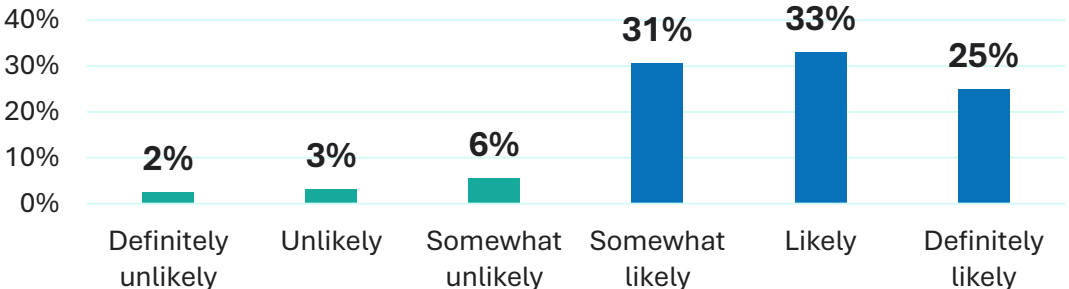


How likely are you to recommend Ybor City to a friend or peer as a place to live?

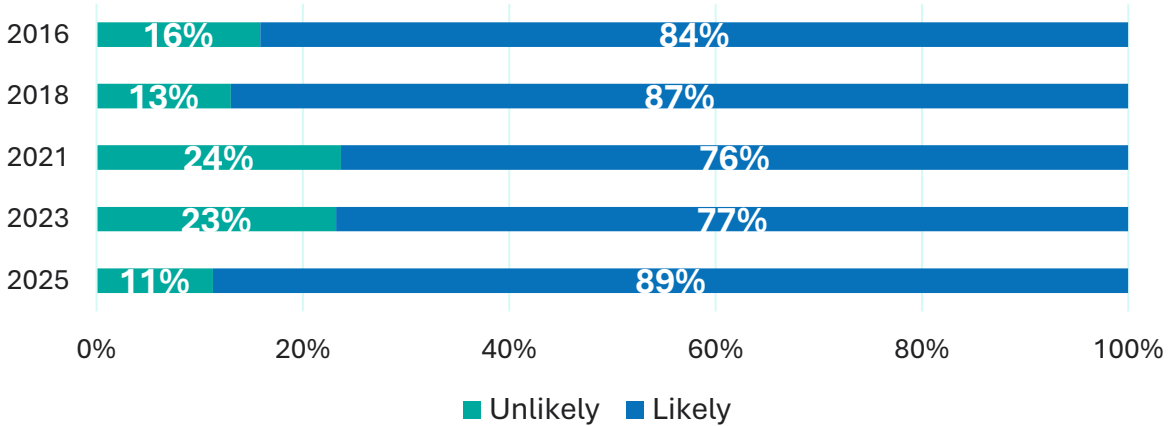


Workers: Recommending Ybor City

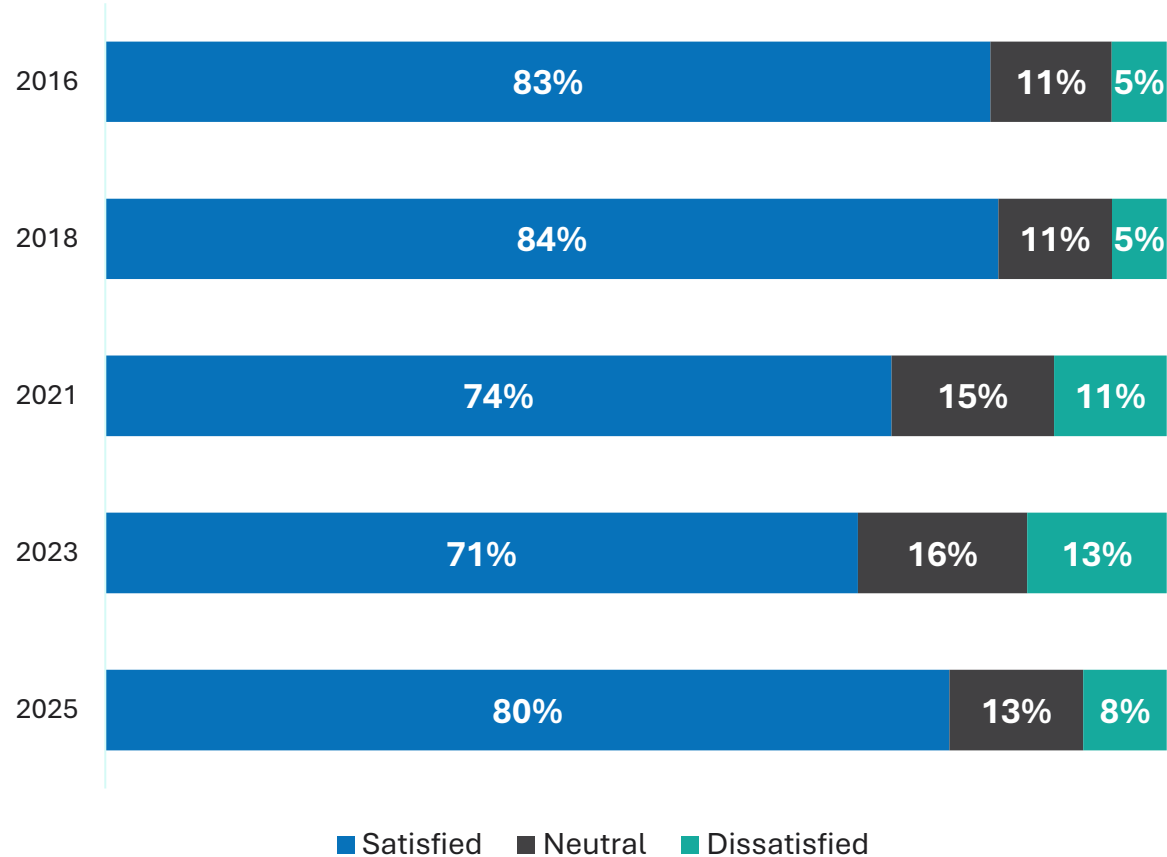
How likely are you to recommend Ybor City to a friend or peer as a place to work?



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



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



■ Satisfied ■ Neutral ■ Dissatisfied

Thank You!

If you have any questions regarding the study, feel free to
contact Brenda Thrower at
Brenda.thrower@tampagov.net.



TAMPACRA