Downtown Tampa Shopping Survey and Study of Potential User Population

Tampa Downtown Partnership

April 2010

Introduction

- Despite a tough economy, there has been a steady increase in residential occupancy of Downtown and surrounding area structures in the past 2 years.

- As a result of inquiries regarding the downtown market by companies considering moving into the area, the Tampa Downtown Partnership expressed desire to update relevant information from an initial study conducted in 2007, and expand upon certain aspects of shopping patterns.

- At the close of 2009, planning began for a study of current and projected shopping habits, by those frequenting the Downtown Core and surrounding areas.

Photos provided by Tampa Downtown Partnership

Objectives

- The goals of the study were to:
  - Develop new information on the resident expectations, relevant to grocery shopping habits
  - Update and expand data from prior studies about downtown worker presence
  - Establish a snapshot of current habits and practices for the entire downtown marketplace
  - Identify supplemental potential users

Methodology

- In order to appropriately address and measure the habits and shopping needs of individuals within the defined region of interest, it would be necessary to develop questionnaires for both residents and workers.

- To reach such a large group in the most cost-effective manner, an electronic surveying technique was determined to be the best-suited means of data collection.

- Distribution of the resident and worker survey links took the form of e-blasts, in-person invitations and postcard mailings.

Distribution

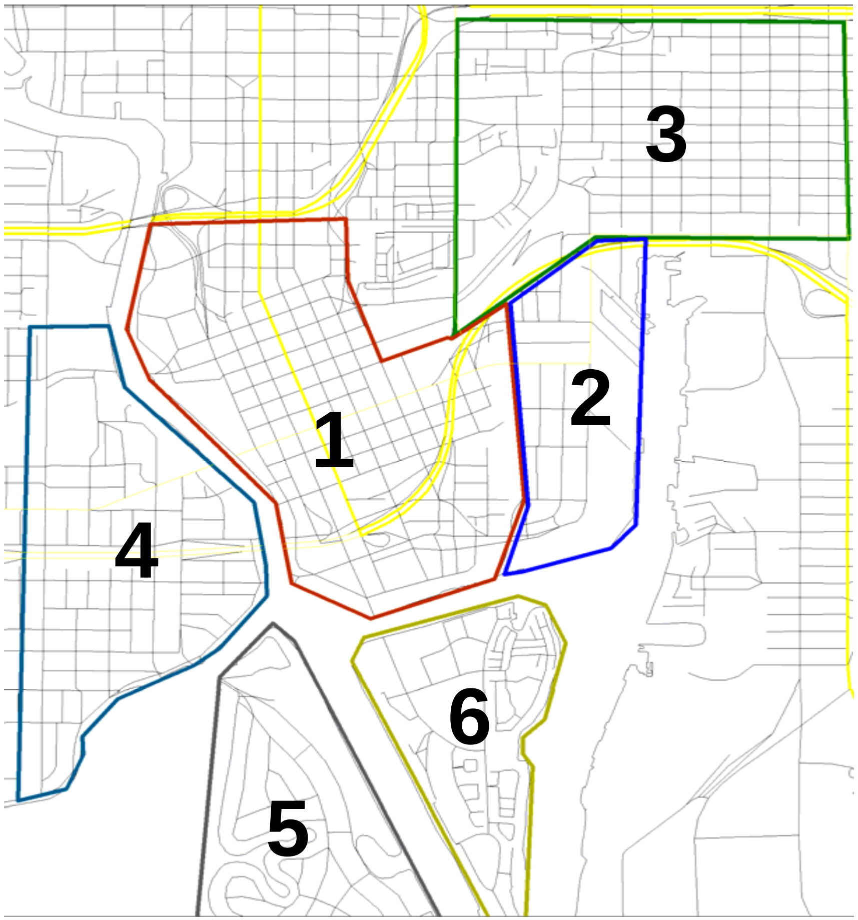
Resident

- E-blast to property owners
- Mentioned at building manager gathering
- Personalized postcards mailed to residents
- UT on-campus resident invitation card handouts
- Invitation cards handed out at building entrances
- St. Petersburg Times article
- Word of mouth encouragement

Worker

- Featured in Monday Morning Memo
- Invitation cards handed out at the Friday Market
- Invitation cards delivered to local businesses
- Invitation cards delivered to UT faculty/staff mailboxes
- Card handouts at the exit of parking garages
- TDP e-blast to listserv
- Tampa Chamber/Ybor Chamber support
- Telephone and email appeals to local businesses
- Partnership's Facebook group
- Word of mouth encouragement

Areas Encompassed in Study



Areas Studied

1) Downtown Core

2) Channel District

3) Ybor City

4) West Bank

5) Davis Island

6) Harbour Island

Executive Summary

- A strong, positive, response was received from both resident and worker Downtown groups with regard to the introduction of a new grocery store to the Downtown area.
  - *Grocery retail* was the top-rated category for improvement, as reported by both resident and worker respondents, followed by *things to do after work*, *shopping retail* and *restaurants*.

- Current shopping patterns suggest the greatest volume of resident shopping after work, in the evening and on weekends. Workers in large part shop on their way home or during lunch breaks.
  - Both residents and workers (at lunchtime) are unwilling to travel great distance for grocery shopping; responses beyond a 10 minute distance were minimal.

- When given a hypothetical store scenario, the "definitely likely to shop" responses by residents and workers were exceptionally high.
  - Likely to some degree responses captured the vast majority of remaining respondents.

Executive Summary (cont'd)

- Within the Downtown area, viable interest by residents and workers from the Core, Channel District, Ybor City, Harbour Island and the outside areas of Davis Island and West Bank, was expressed.
  - Harbour Island and the outside areas present the highest concentrations of affluent residents and workers.

- The potential for structured parking was not reported as being an impediment to shopping by the vast majority of resident and worker respondents—regardless of their current home and/or work parking scenario. Structured parking was considered to be an advantage to shopping, by most respondents.
  - Free and accessible parking were more frequently mentioned concerns. Workers also emphasize their concern for losing their parking space, if distance prohibits travel by foot.

Executive Summary (cont'd)

- Market opportunity within the defined footprint of the study includes the following potential, regularly available, patrons, beyond Downtown and surrounding area residents/workers:
  - UT/HCC faculty/staff, UT/HCC commuter students, UT on-campus students, cruise passengers and cruise crewmembers.

Shopping Report Content

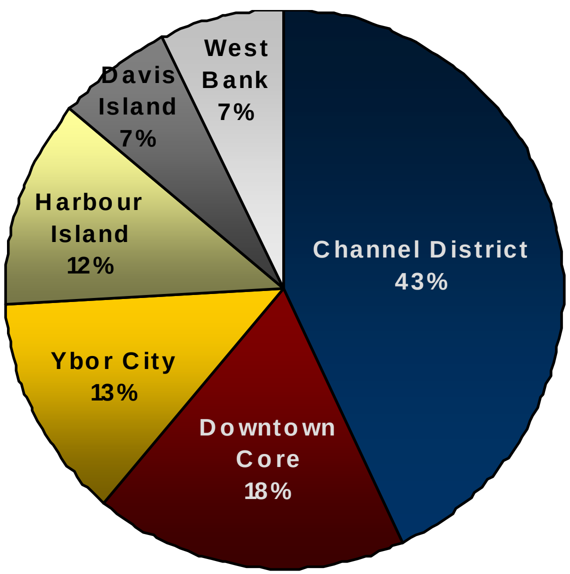
- Respondents
- Existing Habits & Preferences
- Hypothetical Store Response & Shopping Patterns
- Market Opportunity
- Comments
- Demographics

Respondents

Downtown & Surrounding Area <u>Resident</u> Response

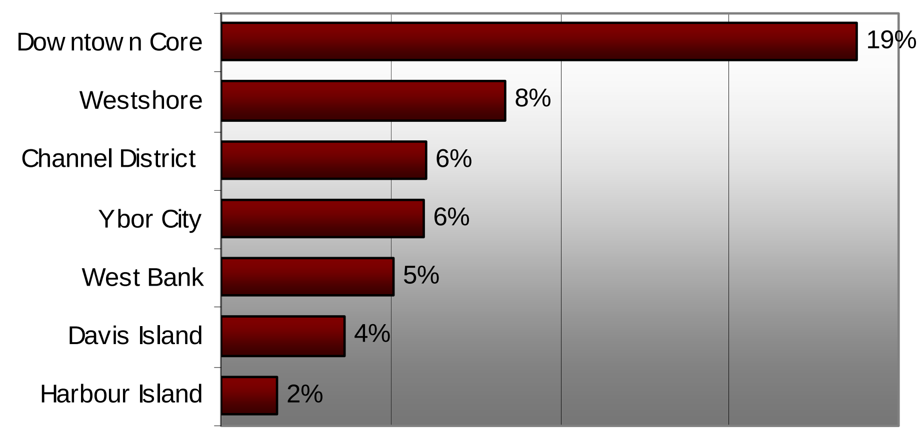
- Response was strongest among Channel District, Downtown Core and Ybor City residents.
- Average penetration of residents within the areas of study was 17%.

Areas of Residence for Resident Respondents



- Half of residents reported a Downtown or surrounding area workplace.
  - 13% work from home.
  - 10% are retired, unemployed or disabled.
  - The remaining 27% reported employment within Hillsborough, Pinellas, Sarasota, Pasco and Polk counties.

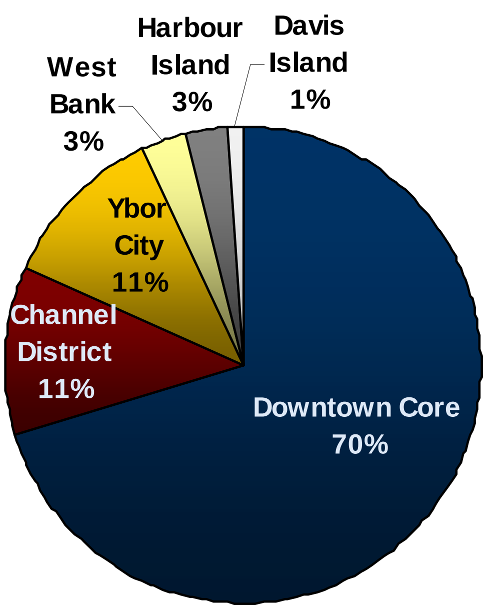
Downtown Employment Among Downtown Residents



Downtown & Surrounding Area Worker Response

- Response was strongest from Downtown Core, Channel District and Ybor City workers.
- Average penetration by area was 2%.

Area of Employment for Worker Respondents



- The top 20 regions of residence, which comprised 93% of worker respondents, are broken down below.

Top 20 Areas of Residence for Worker Respondents

Top 20 Ranking	Area	Percentage of Workers Residing	Direction from Downtown	
1	Downtown Tampa	25.9%	N/A	25.9%
8	University	3.9%	North	
10	Lutz	3.4%	North	
12	Wesley Chapel	3.0%	North	13.5%
14	New Tampa	2.0%	North	
17	Land O'Lakes	1.3%	North	
4	Carrollwood	5.6%	Northwest	
15	Town & Country (T&C)	2.0%	Northwest	9.1%
16	Westchase	1.6%	Northwest	
3	Tampa	7.7%	East	
7	Brandon	4.6%	East	
11	Valrico	3.0%	East	17.6%
18	Plant City	1.2%	East	
19	Seffner	1.2%	East	
20	South Shore	0.9%	South	0.9%
5	Riverview	5.6%	Southeast	
2	South Tampa	9.2%	Southwest	18.5%
9	St. Petersburg	3.7%	Southwest	
6	West Tampa	4.8%	West	7.1%
13	Clearwater	2.3%	West	

Downtown Progress—Setting the Stage

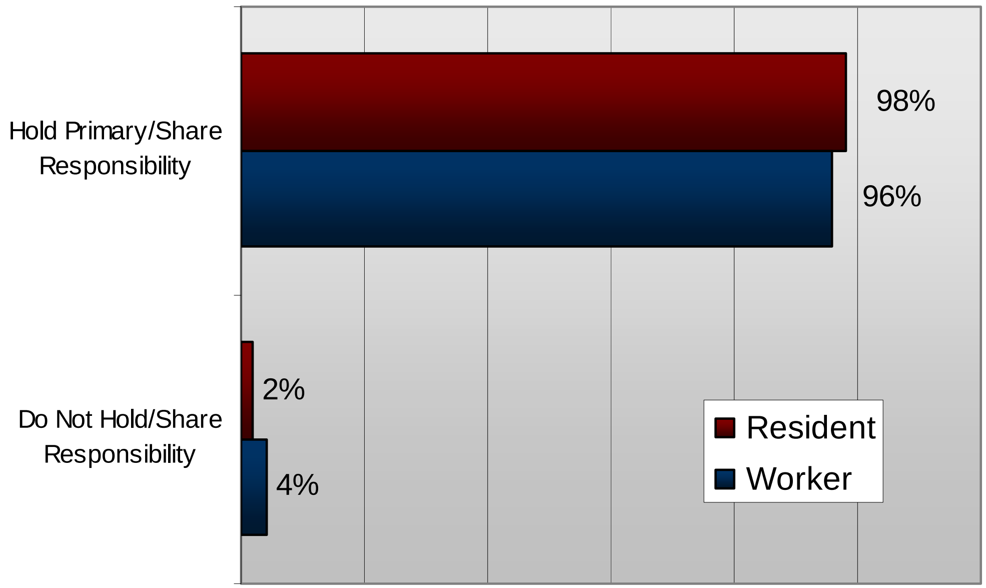
- Both residents and workers rank the following as top-rated categories for improvement:
  - *Grocery Stores*
  - *Things to do After Work*
  - *Shopping/Retail*
  - *Restaurants*

Existing Habits & Preferences

Grocery Shopping Responsibility

- The vast majority of resident and worker respondents either hold the primary responsibility for grocery shopping for their household or equally share the responsibility.

Grocery Shopping Responsibility by Resident and Worker Respondents



Current Downtown Shopping Categories

- The top categories purchased Downtown 6 or more times monthly by residents include *produce, seafood/meat* and *dairy*. For workers, top 6+ frequency categories include *prepared foods, deli* and *produce*.
- The top category purchased Downtown 1-5 times monthly is shared by both residents and workers—*health/pharmacy*.

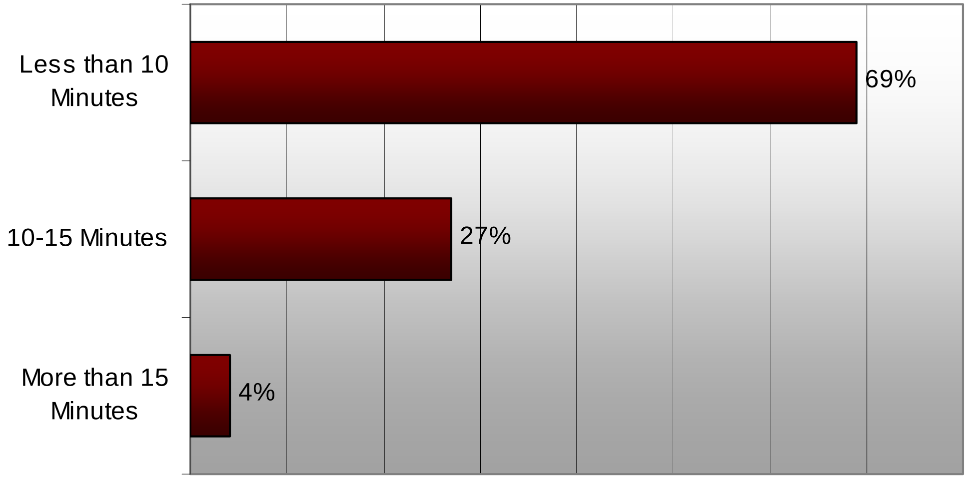
Frequency of Downtown Purchase by Shopping Category

	Never		1-5 Times Monthly		6+ Times Monthly	
	Resident	Worker	Resident	Worker	Resident	Worker
Produce	24%	38%	37%	42%	39%	20%
Seafood/Meat	29%	54%	40%	31%	31%	15%
Dairy Products	25%	45%	44%	38%	31%	17%
Prepared Foods	21%	19%	52%	55%	27%	26%
Deli with Takeout Options	22%	17%	52%	58%	26%	24%
Frozen Foods	29%	52%	47%	36%	25%	11%
Dry Goods	27%	42%	49%	45%	24%	13%
Bakery	33%	40%	50%	51%	17%	9%
Liquor	35%	66%	48%	27%	17%	7%
Banking Services	35%	35%	51%	52%	14%	14%
Health/Pharmacy	25%	29%	61%	61%	14%	10%
Ethnic Foods	30%	46%	56%	45%	14%	9%
Office Food/Supplies	46%	39%	43%	51%	11%	10%
Floral Arrangements/Cards	46%	40%	50%	56%	4%	3%
Wellness Clinic	69%	79%	28%	18%	4%	2%

Distance Residents Willing to Travel for Groceries

- Resident respondents are in large part unwilling to travel great distance to shop for groceries.
  - Approximately 7 in 10 residents are not willing to travel more than nine minutes for groceries.
  - Only 4% are willing to travel more than 15 minutes.

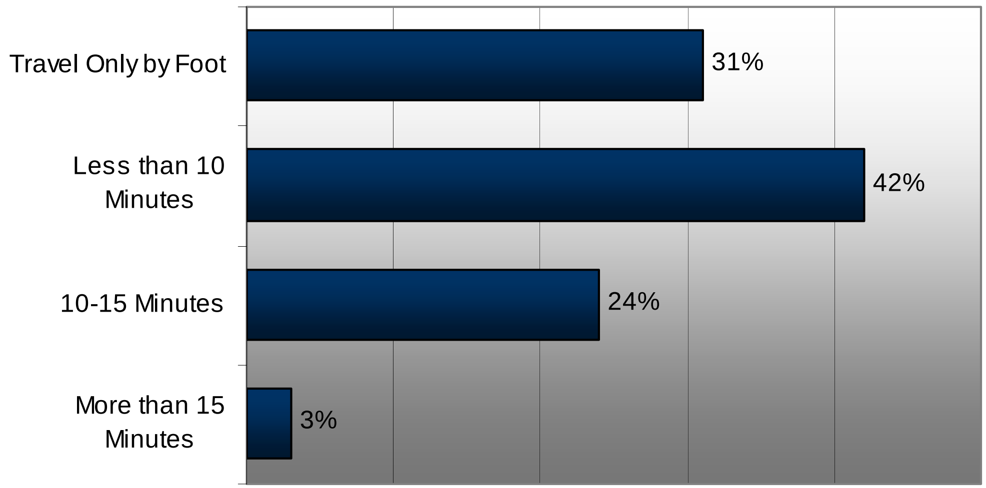
Maximum Distance Residents Willing to Routinely Travel for Groceries



Distance Workers Willing to Travel During Lunchtime

- Worker respondents are in large part unwilling to travel great distance to run errands during their lunch break.
  - 3 in 10 worker respondents only travel by foot during lunchtime.
  - More than 4 in 10 respondents limit their travels to less than 10 minutes.

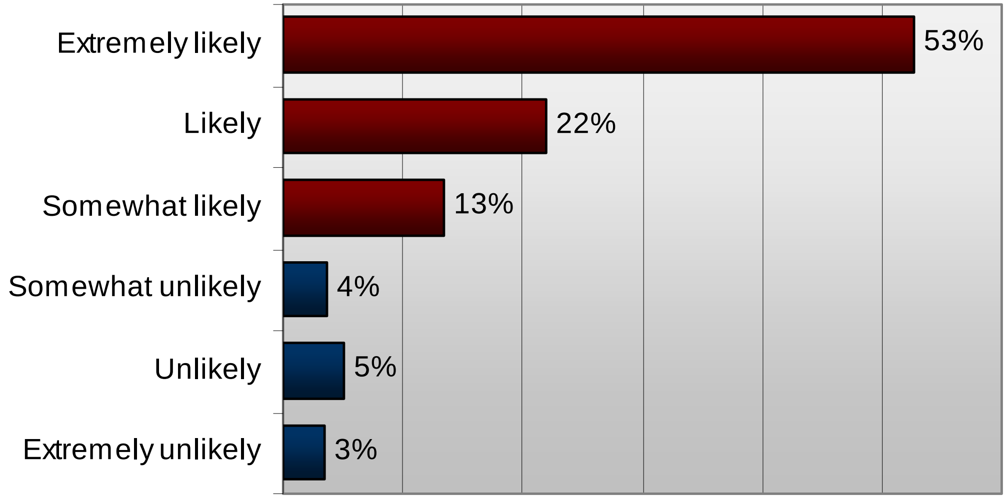
Maximum Distance Workers Willing to Routinely Travel During Lunchtime for HHLD Errands, Shopping or Lunch



Worker Grocery Shopping on Way Home

- More than half of the worker respondents (53%) are *extremely likely* to currently shop for groceries on their way home.
  - 88% or respondents are likely to some degree, to grocery shop on their way home.

Current Likelihood of Workers Shopping for Groceries on Way Home



Timing of Shopping

- Residents are most likely to shop in the downtown area (currently and hypothetically) *on the way home*, in the *evenings* and on *weekends*.
- Employees are most likely to shop downtown *at lunch* and *on the way home.*
  - The overlap between these groups falls in "*on the way home*" shopping.

Most Likely Timing of Grocery Shopping

	Residents	Employees
On the way to work	5%	17%
At lunch	17%	57%
On the way home	57%	74%
Evenings	60%	23%
Weekends	65%	21%
Other	10%	4%

Hypothetical Store Response & Shopping Patterns

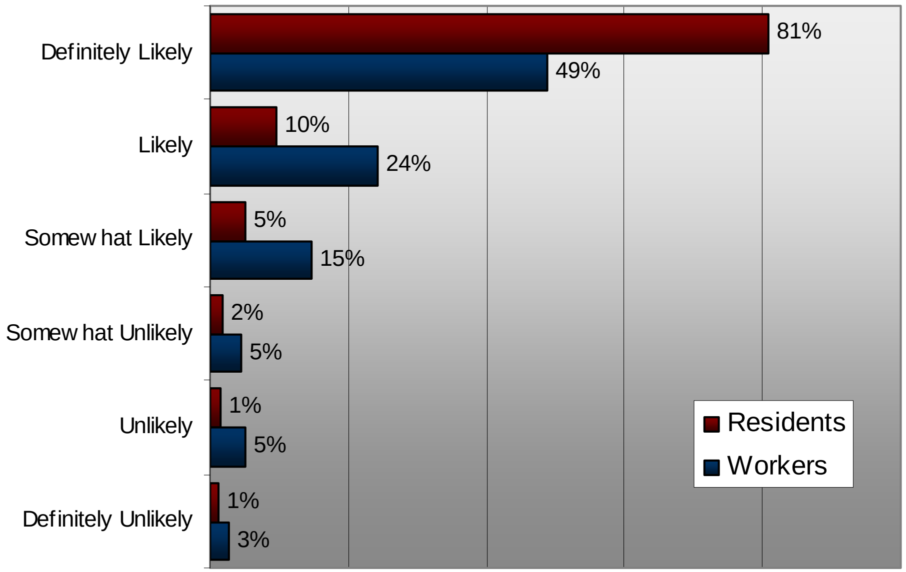
The following data refers to resident and worker shopping habits relevant to a hypothetical grocery store. This hypothetical store as described in our research as:

"…a full service grocery store with easy access, convenient operating hours and structured parking in the Downtown/Channel District area…"

Household Shopping Likelihood

- More than 8 in 10 (82%) resident, and approximately 5 in 10 worker respondents, reported being *definitely likely* to shop at the hypothetical store for household groceries.
  - 96% of resident respondents are likely to some degree, to shop for households groceries.
  - 88% of worker respondents are likely to some degree, to shop for household groceries.

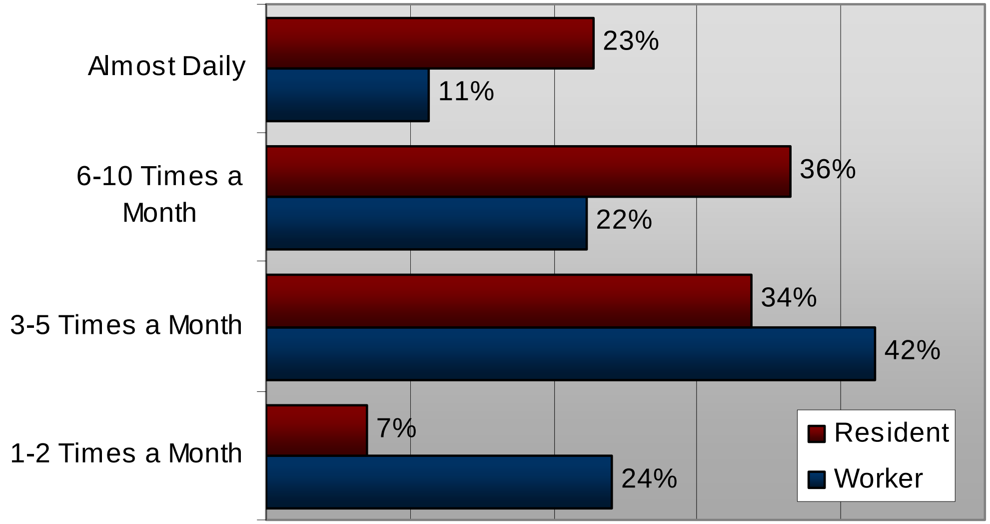
Likelihood of Shopping at Hypothetical Store for HHLD Grocery Needs



Frequency of HHLD Shopping at Hypothetical Store

- 59% of residents who reported being likely to shop at the hypothetical store for household needs, reported a frequency of doing so 6 or more times a month.
- 33% of likely workers reported a 6+ times monthly frequency of shopping for household needs, at the hypothetical store.

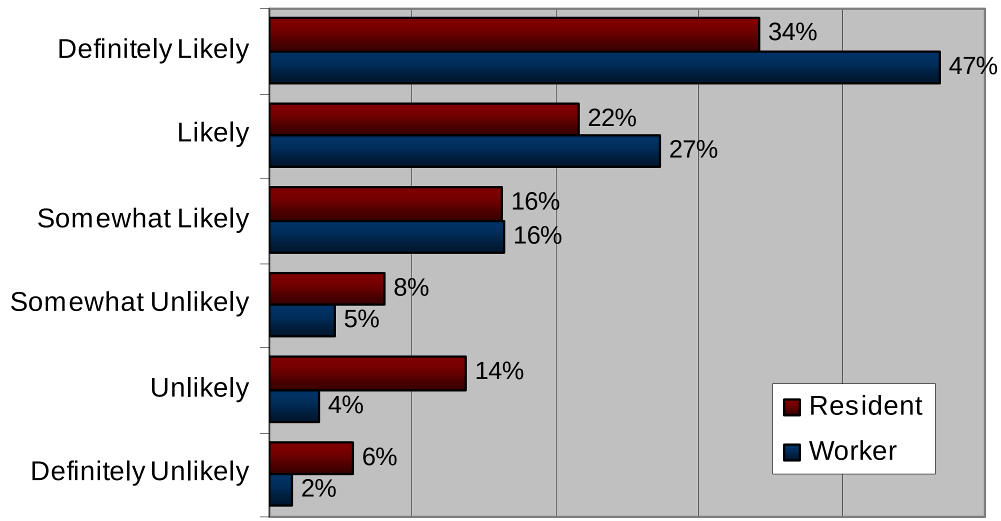
Reported HHLD Shopping Frequencies by Those Likely to Shop at Hypothetical Store



Office/Lunch Shopping Likelihood

- More than one-third (34%) of residents and close to half (47%) of worker respondents reported being *definitely likely* to shop at the hypothetical store for office/lunch needs.
  - 72% of resident respondents are likely to some degree to shop for office/lunch needs.
  - 90% of worker respondents are likely to some degree to shop for office/lunch needs.

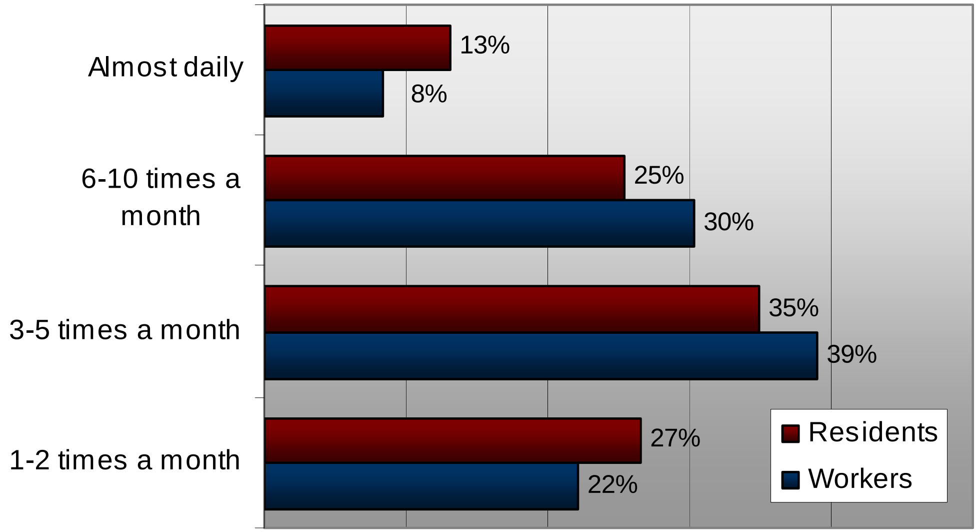
Likelihood of Shopping at Hypothetical Store for Office/Lunch Needs



Frequency of Office/Lunch Shopping at Hypothetical Store

- More than one-third (38%) of resident as well as worker respondents, who reported being some degree of likelihood towards shopping at the hypothetical store, reported a frequency of shopping for office/lunch needs of 6 times a month or more.

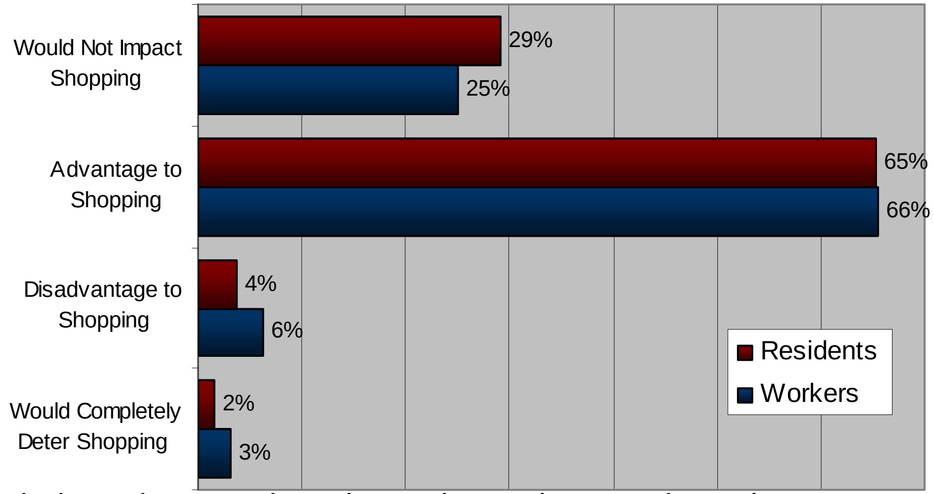
Reported Office/Lunch Shopping Frequencies by Those Likely to Shop at Hypothetical Store



Reaction to Structured Parking

- Regardless of reported likelihood of shopping at the hypothetical store, the majority of resident and worker respondents are not concerned with the potential for the grocery store providing structured parking.
  - More than 90% of resident and worker respondents either consider structured parking to be *an advantage* or of *no impact* to their shopping decision.

Influence of Structured Parking on Shopping Decision



Note: Respondents included residents and workers who park in residential garages, garages at their place of employment as well as those who do not utilize structured parking on a regular basis.

Market Opportunity

Potential Shoppers

- Residential Households
- On-Campus Resident Students
- Non-Resident Students
- Workers
- College Faculty/Staff
- Cruise Passengers
- Cruise Crewmembers

These potential shopper groups, currently contributing to Downtown Tampa and surrounding area economies, represent in excess of **980,800** individuals throughout the year.

Data collected from multiple sources, including: USPS, TAZ counts, Tampagov.net, UT/HCC materials, Tampa Port Authority

Comments

Additional Resident Comments

- The most frequent comments voiced, represented strong support in general towards the idea of bringing a grocery store into the area.

- Residents also recognize the impact that a grocery store would have on attracting new residents and additional retailers

Comment	Frequency
General Positive	141
Bolster Residents and Retailers	54
Walkable Store	35
Easy/Free Parking	31
Organic	23
Traffic Concerns	22
Good Prices	17
Basic Merchandise/Non-Organic	17
Negative--Wal-Mart	12
Fresh Produce	11
Trader Joe's	10
CVS/Walgreens Pharmacy	10
Safety Concerns	8
Home Delivery Service	7
Friendly Staff/Atmosphere	7
Flexible/24 Hour Operation	7
Full Shopping Center	5
No Need	4
Positive for Channelside Location	77
Positive for Core Location	15
Positive for Ybor Location	17
Positive for Harbour Location	4
Encore Community	4

Additional Employee Comments

- Downtown workers provided frequent positive comments regarding the potential for a new downtown store.
- Workers were slightly less likely to feel strongly about the location in the Channel District and there is some misunderstanding regarding what the Channel District entails.
- Ability to walk to the store and not lose their parking space at work was a frequent concern.

Comment	Frequency
General Positive	125
Walkable Store	83
Easy/Free Parking	72
Traffic Concerns	64
Clothing/Retail	22
Organic	21
Good Prices	20
Upscale/Boutique Store	15
Trader Joe's	14
Basic Merchandise/Non-Organic	13
Deli	12
Bolster Residents and Retailers	9
Trolley Access	9
CVS/Walgreens Pharmacy	8
Flexible/24 Hour Operation	7
Working Moms	7
Safety Concerns	6
Full Shopping Center	6
Full Size Store	6
Bakery	6
Shuttle	4
Home Delivery Service	3
No Need	10
Positive for Channelside Location	28
Positive for Core Location	20
Positive for Ybor Location	9
Encore Community	5

Demographics

Total Respondent Demography

Gender	Residents	Workers
Male	52%	34%
Female	48%	66%

Age	Residents	Workers
Under 25	10%	3%
25-34	40%	25%
35-44	21%	25%
45-54	16%	29%
55-64	9%	16%
65 or older	4%	2%

Children in HHLD	Residents	Workers
Yes	16%	38%
No	84%	62%

Status	Residents	Workers
Single	32%	21%
Committed but not married	27%	16%
Married	34%	52%
Divorced/widowed/separated	7%	11%

HHLD Income	Residents	Workers
Under $50,000	15%	18%
$50,000-$99,999	37%	41%
$100,000-$149,999	24%	25%
$150,000-$199,999	12%	9%
$200,000-$249,999	4%	4%
$250,000 or more	9%	4%

Shopping Data	Residents	Workers
Definitely Likely--HHLD	81%	49%
Some Degree Likely-HHLD	96%	88%
6-10+ HHLD Monthly Freq.	59%	33%
Definitely Likely--Office/Lunch	34%	47%
Some Degree Likely-Office/Lunch	72%	90%
6-10+ Office/Lunch Monthly Freq.	38%	38%

Downtown Core Respondent Demography

Gender	Residents	Workers
Male	52%	31%
Female	48%	69%

Age	Residents	Workers
Under 25	16%	2%
25-34	42%	23%
35-44	18%	25%
45-54	14%	32%
55-64	9%	16%
65 or older	2%	2%

Children in HHLD	Residents	Workers
Yes	10%	41%
No	90%	59%

Status	Residents	Workers
Single	47%	20%
Committed but not married	31%	14%
Married	18%	55%
Divorced/widowed/separated	4%	11%

HHLD Income	Residents	Workers
Under $50,000	18%	15%
$50,000-$99,999	34%	41%
$100,000-$149,999	21%	26%
$150,000-$199,999	15%	10%
$200,000-$249,999	2%	4%
$250,000 or more	9%	4%

Shopping Data	Residents	Workers
Definitely Likely--HHLD	80%	46%
Some Degree Likely-HHLD	96%	87%
6-10+ HHLD Monthly Freq.	54%	31%
Definitely Likely--Office/Lunch	29%	47%
Some Degree Likely-Office/Lunch	74%	91%
6-10+ Office/Lunch Monthly Freq.	29%	38%

Channel District Respondent Demography

	Residents	Workers
Gender		
Male	55%	49%
Female	45%	51%
Age		
Under 25	12%	5%
25-34	48%	32%
35-44	21%	21%
45-54	11%	23%
55-64	5%	19%
65 or older	3%	1%
Children in HHLD		
Yes	12%	25%
No	88%	75%
Status		
Single	36%	27%
Committed but not married	31%	24%
Married	30%	41%
Divorced/widowed/separated	3%	9%

	Residents	Workers
HHLD Income		
Under $50,000	13%	19%
$50,000-$99,999	38%	39%
$100,000-$149,999	25%	27%
$150,000-$199,999	12%	8%
$200,000-$249,999	4%	3%
$250,000 or more	9%	4%
Shopping Data		
Definitely Likely--HHLD	94%	64%
Some Degree Likely-HHLD	99%	93%
6-10+ HHLD Monthly Freq.	70%	48%
Definitely Likely--Office/Lunch	43%	59%
Some Degree Likely-Office/Lunch	80%	95%
6-10+ Office/Lunch Monthly Freq.	47%	47%

Ybor City Respondent Demography

Gender	Residents	Workers
Male	56%	29%
Female	44%	71%

Age	Residents	Workers
Under 25	3%	5%
25-34	43%	25%
35-44	23%	29%
45-54	18%	25%
55-64	10%	16%
65 or older	3%	0%

Children in HHLD	Residents	Workers
Yes	14%	45%
No	86%	55%

Status	Residents	Workers
Single	31%	21%
Committed but not married	34%	12%
Married	27%	55%
Divorced/widowed/separated	9%	13%

HHLD Income	Residents	Workers
Under $50,000	19%	29%
$50,000-$99,999	48%	46%
$100,000-$149,999	21%	17%
$150,000-$199,999	7%	7%
$200,000-$249,999	3%	1%
$250,000 or more	2%	1%

Shopping Data	Residents	Workers
Definitely Likely--HHLD	89%	40%
Some Degree Likely-HHLD	99%	83%
6-10+ HHLD Monthly Freq.	47%	24%
Definitely Likely--Office/Lunch	37%	37%
Some Degree Likely-Office/Lunch	73%	87%
6-10+ Office/Lunch Monthly Freq.	28%	33%

Harbour Island Respondent Demography

Gender	Residents	Workers*
Male	45%	46%
Female	55%	54%

Age	Residents	Workers*
Under 25	2%	7%
25-34	24%	31%
35-44	25%	17%
45-54	24%	26%
55-64	17%	14%
65 or older	8%	5%

Children in HHLD	Residents	Workers*
Yes	22%	17%
No	79%	83%

Status	Residents	Workers*
Single	23%	33%
Committed but not married	18%	25%
Married	46%	38%
Divorced/widowed/separated	13%	4%

HHLD Income	Residents	Workers*
Under $50,000	7%	21%
$50,000-$99,999	31%	21%
$100,000-$149,999	30%	21%
$150,000-$199,999	12%	13%
$200,000-$249,999	4%	3%
$250,000 or more	15%	23%

Shopping Data	Residents	Workers*
Definitely Likely--HHLD	80%	78%
Some Degree Likely-HHLD	99%	96%
6-10+ HHLD Monthly Freq.	64%	59%
Definitely Likely--Office/Lunch	27%	52%
Some Degree Likely-Office/Lunch	68%	91%
6-10+ Office/Lunch Monthly Freq.	33%	44%

*Base of greater than 50 but fewer than 100 respondents

Davis Island/West Bank Respondent Demography

Gender	Residents	Workers
Male	42%	41%
Female	58%	59%

Age	Residents	Workers
Under 25	11%	5%
25-34	24%	30%
35-44	20%	30%
45-54	27%	15%
55-64	13%	15%
65 or older	6%	7%

Children in HHLD	Residents	Workers
Yes	32%	20%
No	69%	80%

Status	Residents	Workers
Single	25%	29%
Committed but not married	16%	20%
Married	51%	43%
Divorced/widowed/separated	8%	9%

HHLD Income	Residents	Workers
Under $50,000	22%	17%
$50,000-$99,999	28%	38%
$100,000-$149,999	22%	24%
$150,000-$199,999	10%	5%
$200,000-$249,999	5%	7%
$250,000 or more	12%	9%

Shopping Data	Residents	Workers
Definitely Likely--HHLD	35%	58%
Some Degree Likely-HHLD	80%	87%
6-10+ HHLD Monthly Freq.	32%	43%
Definitely Likely--Office/Lunch	18%	34%
Some Degree Likely-Office/Lunch	49%	84%
6-10+ Office/Lunch Monthly Freq.	38%	44%

At 10,000 feet…

Conclusions

- There appears to be a need—demand even (based on open-ended remarks and frequency of use), shared by both residents and workers, for an additional grocery store in the urban marketplace of Downtown Tampa.
- Extrapolation of potential users, frequency of shopping and likely expenditures suggests strong support for an additional store.
- Although both residents and workers report strong likelihood of use, the timing and frequency of their patronage varies to some degree.
- Concerns are held by both residents and workers were parking availability, traffic and "walkability".
- There were mixed opinions voiced with regard to an organic store, with current distance to shop at one being the main voiced reason "for" and cost of a specialty organic grocer being the main voiced concern "against".
- Cruise passengers, but even more so, cruise crewmembers reflect strong potential for regular shopping of a grocery store.

Conclusions (cont'd)

- The study offers evidence suggesting the power of a new store to draw shoppers from the Core, Ybor City, Harbour Island, Davis Island and the West Bank.
- It is clear to the researchers, that substantial effort will be necessary to uncover nuances of the individuals within each of the Downtown and surrounding areas which would be served by a new grocery store.
- Based upon reported current worker shopping patterns and projections of likely use, the data suggests likelihood of shopping habits being picked up by workers who are not currently shopping in Downtown, but would with the addition of a new store.
- Data will be very useful in determining market potential and if a new store is located will be invaluable in establishing marketing plans.