Downtown Tampa Student Study 2016

Objectives

- Collect data from Downtown Tampa students.
- Measure 2016 levels of satisfaction, participation and response for current Downtown topics, activities, events and venues.
- Identify needs expressed by the student community.
- Capture the Downtown Tampa urban student experience.

Methodology & Distribution

- An electronic survey was developed that incorporated select historical content from past Resident and Worker surveys, along with addressing new topics relevant to the student experience.
- This methodology was selected due to its amenability to student schedules.
- Methods included in survey dissemination are shown below.

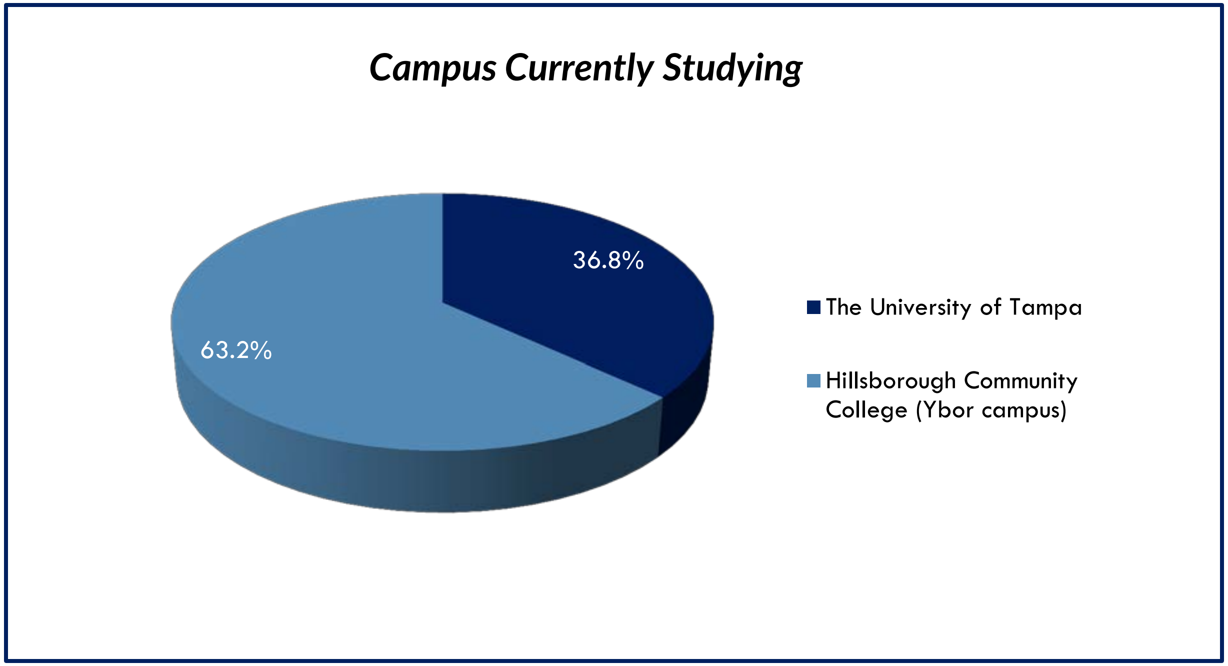
Student Distribution

- Featured in Monday Morning Memo
- Invitation Cards vis Downtown Guides
- Engagement through social media
- Word of mouth encouragement
- Email and phone outreach to urban campuses
- Dean, professor and direct student outreach
- Residence Life and Career Services outreach
- Base incentive provided to all participants
- Incentive promotions to random drawing of participants

Students

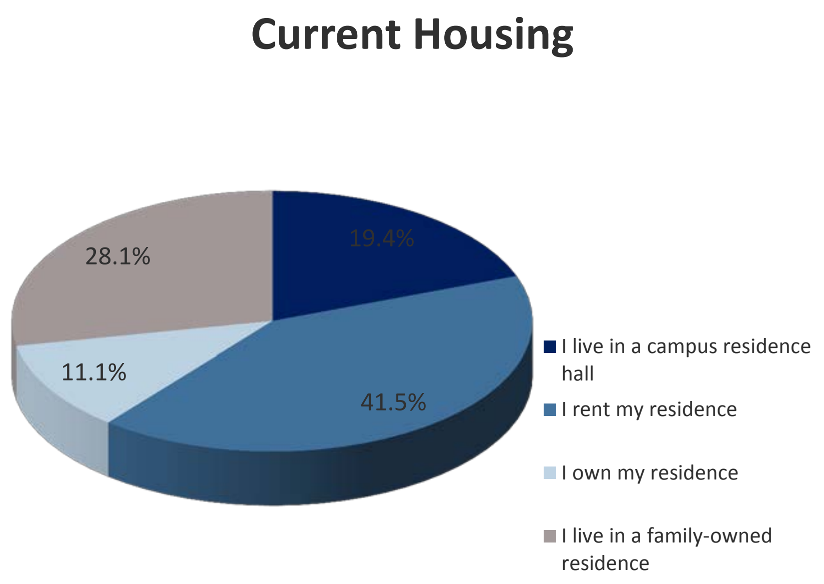
Student Details

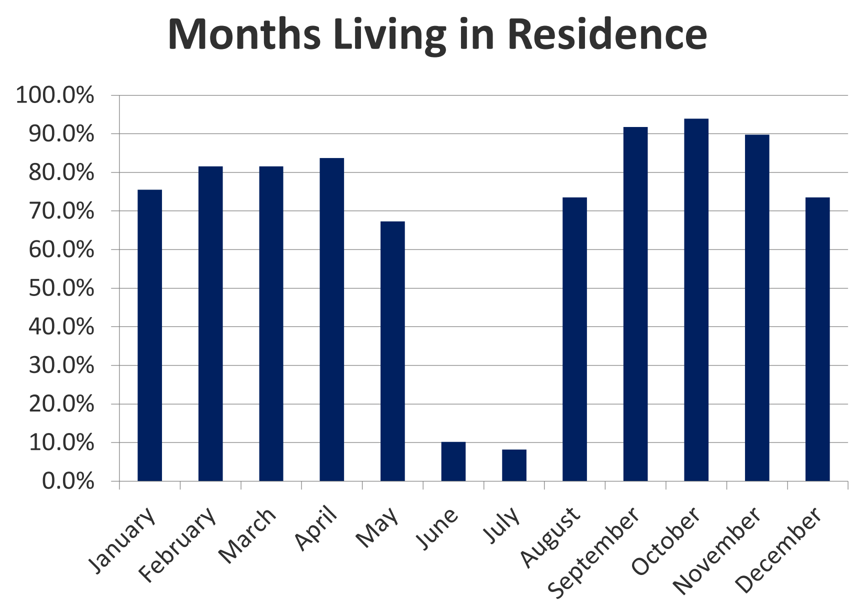
- The respondent base is made up of University of Tampa (36.8%), and Hillsborough Community College (63.2%) students.



Housing

- Approximately one-fifth of students reside in an on-campus residence hall.
- The majority of remaining students rent their residence (41.5%), with the final share living in a family-owned residence (28.1%) or personally owned residence (11.1%).
- Approximately 90% of students vacate their residence in the months of July and August.

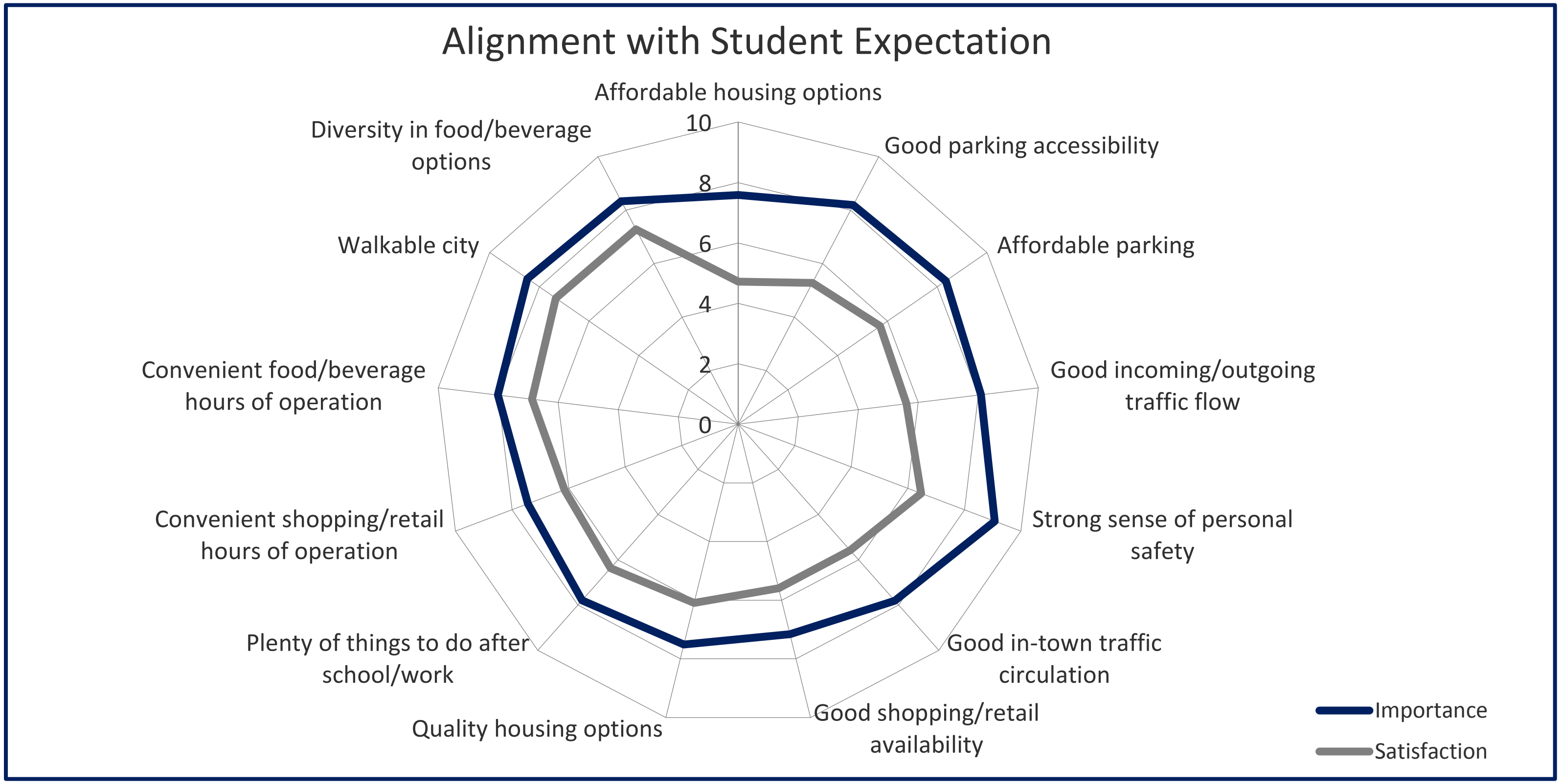




Downtown Impressions

- Students placed strongest importance on safety, walkability and affordable parking.
  - Largest gaps were noted for affordable housing options, good parking accessibility and affordable parking.
  - Best alignment with F&B diversity, walkability, convenient F&B hours expectations.

For the following, rate how important you consider each, as a student, and then how satisfied you are with your experience with each, in Downtown Tampa. (10-pt scale)



Catering to Groups

- Approximately 7 in 10 students believe that Downtown Tampa caters particularly well to:
  - *Business owners*
  - *Young professionals*
  - *Bicyclists*
  - *Entrepreneurs*

- Approximately 3 in 5 students believe that Downtown Tampa caters well to *students.*

From your experience in Downtown Tampa, how well do you feel that the region caters to the following groups:

	Caters Well to This Group
Business owners	80.3%
Young professionals	79.1%
Bicyclists	71.5%
Entrepreneurs	71.1%
Students	67.9%
Pet owners	67.6%
Families with young children	58.3%
Gay/lesbian/bisexual/transgender individuals	49.3%

Downtown Tampa Assets

- When asked the question "*What is most appealing about this area,"* responses included:

Riverwalk! How it connects all parks , museums and venues.

Amalie Arena and the atmosphere it creates.

It's on the water and has the opportunity to keep growing

Diversity in ages, races and food options.

Streets are walkable and safe.

Atmosphere, scenery and entrepreneurial spirit

Variety of assets downtown and walkability to access them.

The restaurants, courtyards, art and sitting areas.

Gorgeous Riverwalk and park area, great venue for music and festivals

Event & Attraction Participation

- Half of the students visited the following at least once:
  - *The Riverwalk*
  - *A public park*
  - *A social event*
  - *Permanent attraction*
  - *Sporting event*

- Over one-third visited the Riverwalk 4+ times in the past year.

How many times in the past 12 months have you attended the following events and attractions?

	2016	
	Attended	Attended 4+
The Riverwalk	80.4%	37.5%
Public Park	75.1%	30.2%
Social Event (concert, festival, gathering)	70.6%	20.6%
Permanent Attraction (Bay Plaza, Aquarium, Pavillion)	55.3%	11.2%
Sporting Event	55.3%	10.0%
Museum	44.4%	8.9%
Live Theater	25.0%	6.0%

Likelihood of Student Participation

- The top five categories students reported being most likely to use/participate in, if available, were:
  - *Upgraded Wi-Fi access in public areas* (85.7%)
  - *Waterfront dining* (85.2%)
  - *Indoor shopping mall* (77.9%)
  - *Grocery store* (76.2%)
  - Outdoor art park (76.0%)

- Categories rated as likely to use by less than one-half of students were:
  - *Extended TECO Line Streetcar routes*
  - *Expanded bus service*
  - *Extended rubber wheeled trolley routes*
  - *Pedicab (bicycle rickshaw)*
  - *Electric vehicle charging stations*

If available or more prevalent, how likely would you be to participate in or utilize the following in Downtown?

	Categories Likely to Use
Upgraded Wi-Fi access in public areas	85.7%
Waterfront dining	85.2%
Indoor urban shopping mall	77.9%
Grocery store	76.2%
Outdoor art park	76.0%
Retail on the Riverwalk	67.2%
Franklin Street retail	58.3%
Express transit service between Tampa International Airport and Downtown Tampa	56.9%
Light rail	53.8%
Extended TECO Line Streetcar routes	46.1%
Expanded bus service	45.5%
Extended rubber wheeled trolley routes	44.6%
Pedicab (bicycle rickshaw)	35.2%
Electric vehicle charging stations	22.7%

Shopping Mall Visits

- The following shopping venues were visited by 8 in 10 students monthly:
  - West Shore Plaza and International Plaza
- The following shopping venues are visited three or more times monthly by one-quarter or more of students:
  - West Shore Plaza
  - International Plaza
  - Centro Ybor
  - Channelside Bay Plaza
  - Westfield Brandon Town Center

In a typical 30 days, how often would you or someone in your household visit the following shopping centers?

	2016	
	Visit	Visit 3+
West Shore Plaza	80.2%	30.8%
International Plaza	80.2%	30.7%
Centro Ybor	72.0%	39.5%
Hyde Park Village	60.8%	22.8%
Channelside Bay Plaza	58.8%	18.2%
Westfield Brandon Town Center	56.8%	27.2%
IKEA (Ybor)	53.5%	1.0%
University Mall (North Tampa)	47.3%	19.5%
Tampa Premium Outlets	45.0%	12.2%
Citrus Park Town Center	33.1%	5.2%
The Shops at Wiregrass	30.9%	8.9%
Sundial (St. Petersburg)	18.7%	3.5%

Average Spending

- Students report doing more of their spending outside of Downtown than within, resulting in dollars earmarked for groceries, restaurants, retail, personal services, entertainment, etc., exiting Downtown.

- The categories of starkest differentiation were *groceries*, *gas* and *clothing/miscellaneous retail*, with 80.9%, 78.8% and 77.1% of spending occurring outside of Downtown Tampa, respectively.

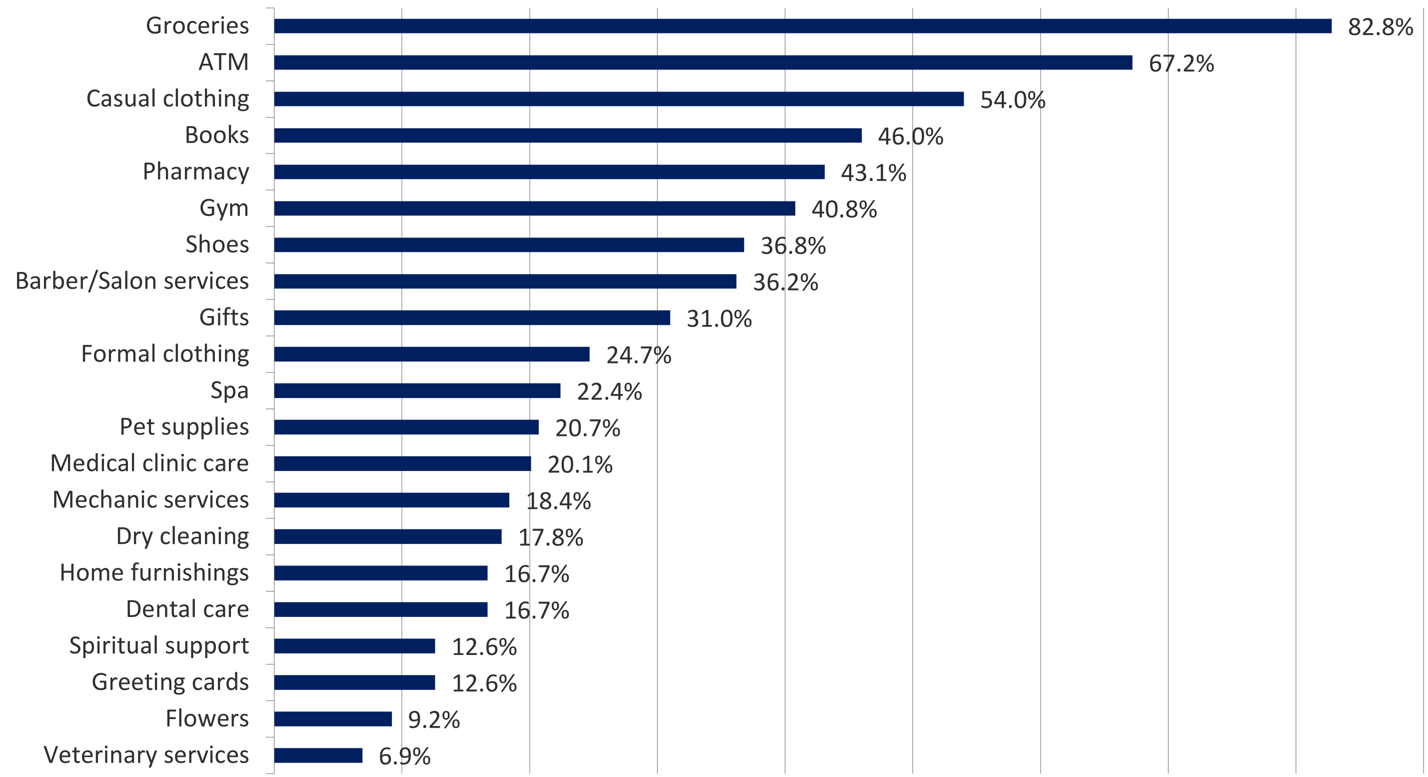
How much would you estimate that you spend in the following categories during a typical month in Downtown Tampa?

	Within Downtown Average	Outside of Downtown Average
Restaurants	$57.68	$110.16
Groceries	$42.59	$180.77
Gas	$20.73	$77.18
Clothing & Misc. Retail	$26.86	$90.19
Personal Services (spas, dry cleaners, gyms, etc.)	$17.39	$46.86
Entertainment/Bars/Clubs	$45.05	$59.26

Purchase Categories

- Approximately 2 in 5 or more reported that they need groceries, ATM, casual clothing, books, pharmacy, and gym in a typical 90 days.

Do you find yourself in need of purchasing or accessing any of the following services in a typical 90 days either in or outside of Downtown Tampa?



Retail Availability in Downtown

- Students considered clinics, mechanics and dry cleaning to be least available within Downtown.
- Students considered shoes, casual clothing and formal clothing to be least available within Downtown.

How would you describe availability in Downtown Tampa? (Base: Respondents needing in typical 90 days; services, left, purchase categories, right)

Meeting Needs of Students

- Students were asked, "*In what ways does Downtown Tampa currently meet the needs of the area's student population?*" Responses included:

- *"Lots of places to study, affordable outdoor restaurants, parks to sit in."*
- *"Peaceful scenery, diversity, easy to walk around"*
- *"Good and safe area, centered and relatively close to most activities"*
- *"Meets the needs of students by having the Riverwalk, with proximity to school and shopping."*
- *"Awesome cultural scene with museums, performing arts, and history museums"*
- *"It's calm and safe."*
- *"A lot of social activities, good networking, and a lot of good schools."*
- *"Nature walks and good areas to workout."*
- *"Sunday yoga, some very cool niche's and nifty events on the Riverwalk"*

Meeting Needs of Students

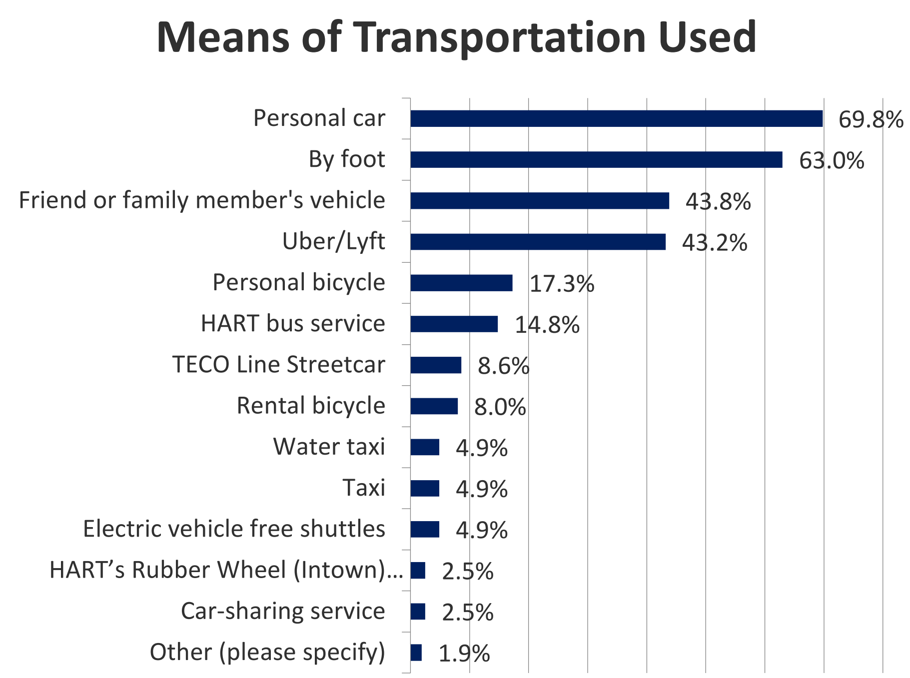
- Students were asked *In what ways could Downtown Tampa better meet the needs of the area's student population?* Responses included:

- *"More student safety precautions as well as pedestrian safety. More healthy restaurants."*
- *"Easier and cheaper transportation."*
- *"Cheap kayak rentals on the river near UT. Solve safety concerns on Cass St. bridge."*
- *"More affordable places for students to do homework, hang out and relax."*
- *"Less parking lots, more artistic venues and affordable retail."*
- *"More services, more restaurants and bars, easier walkability."*
- *"Lower priced living, better night scene."*
- *"Provide students with information on all that is available to students in downtown."*
- *"Lack of options. Gets boring quickly."*

Transportation Usage

- Major means of transit used by students in Downtown Tampa are walking, driving, a friend/family member's vehicle, and Uber/Lyft.
- Less than 1 in 10 use:
  - TECO streetcar
  - Bike rental
  - Water taxi
  - Taxi
  - Downtowner
  - InTown
  - ZipCar
- Open-ended "other" responses included reported usage of rental cars.

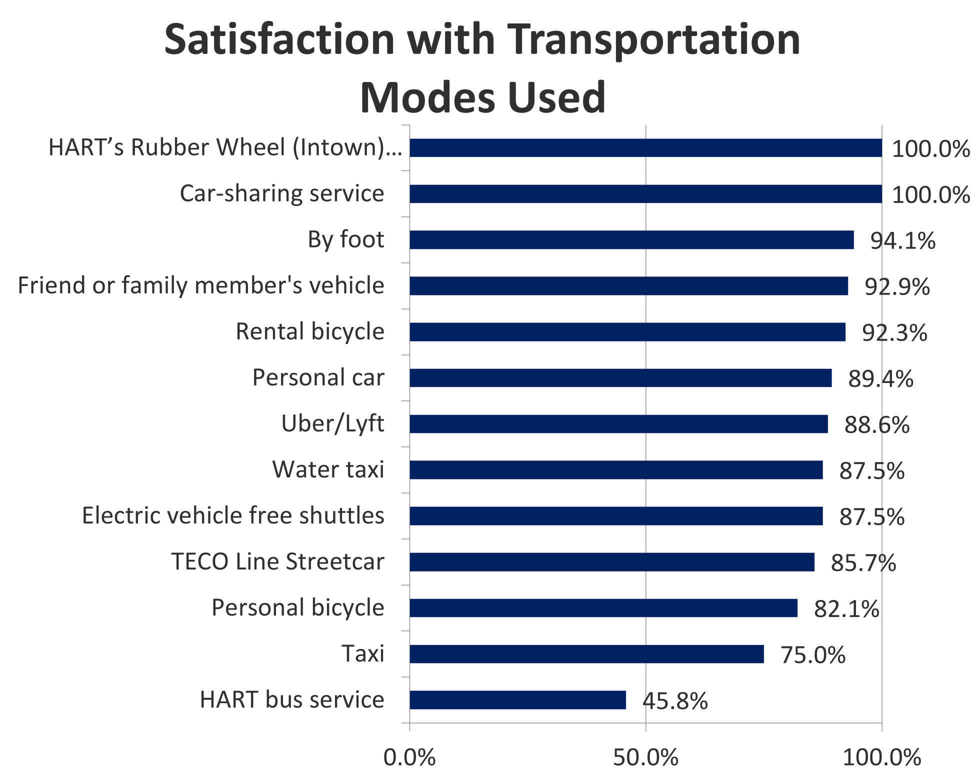
Do you ever use any of the following modes of transportation to get around in Downtown Tampa?



Transportation Satisfaction

- Students report high levels of satisfaction with the modes of transportation they use—9 in 10 satisfied with:
  - HART's Rubber-Wheel Trolleys
  - Car sharing
  - Walking
  - Friend/family vehicle
  - Bike rental

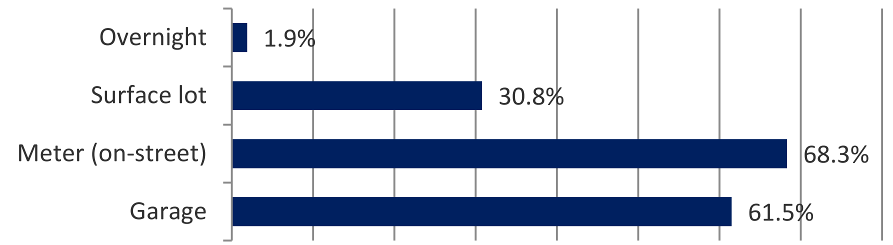
Rate your satisfaction with the following Downtown Tampa transportation modes.



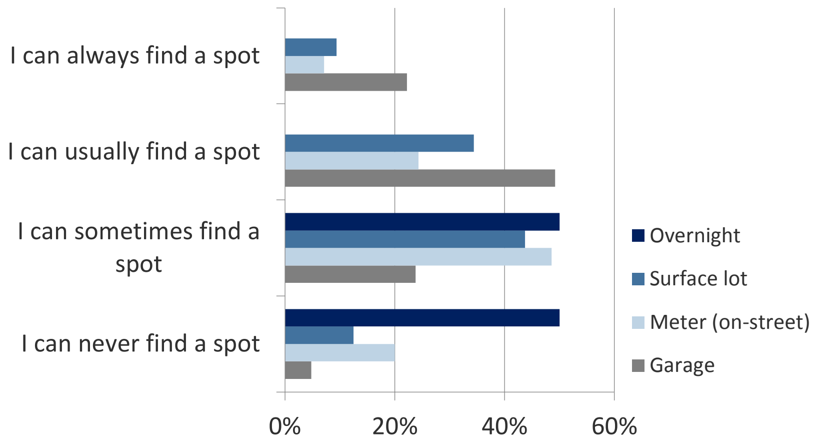
Parking

- Most common modes of parking in Downtown used by students were meter and garage.
- Users of overnight, meter and surface parking, considered the options to be least accessible, in that order.
- Users of meter and garage parking consider these means to be least affordable.

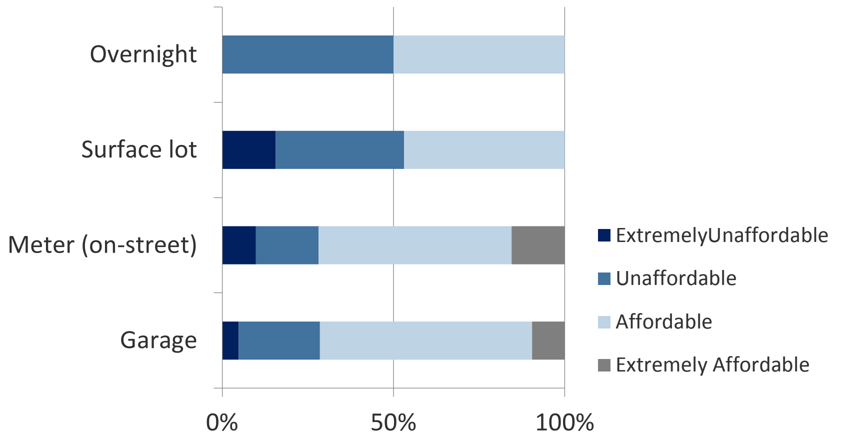
What types of parking do you use in downtown Tampa?



Rate how accessible you consider each type of parking.

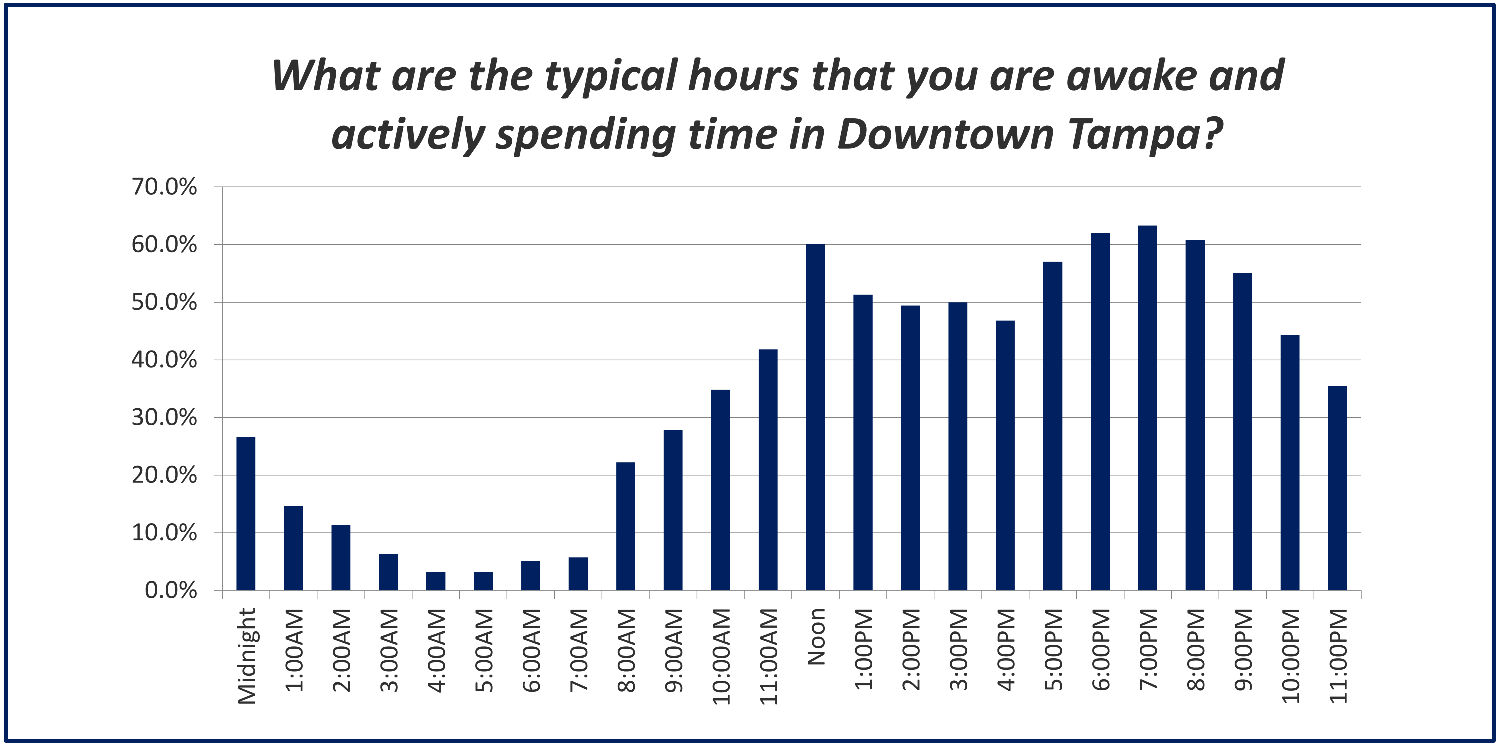


Rate how affordable you consider each type of parking.



Hours Spent in Downtown

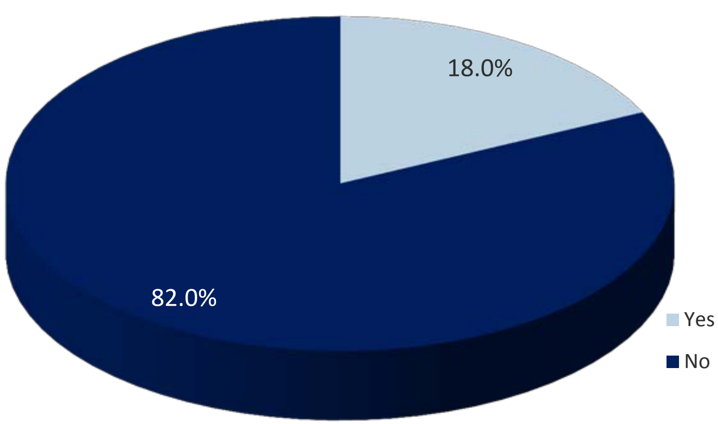
- "Awake and active" hours for students peak between noon and 11:00 PM.
- Hours of greatest activity are between 5:00-7:00 PM.



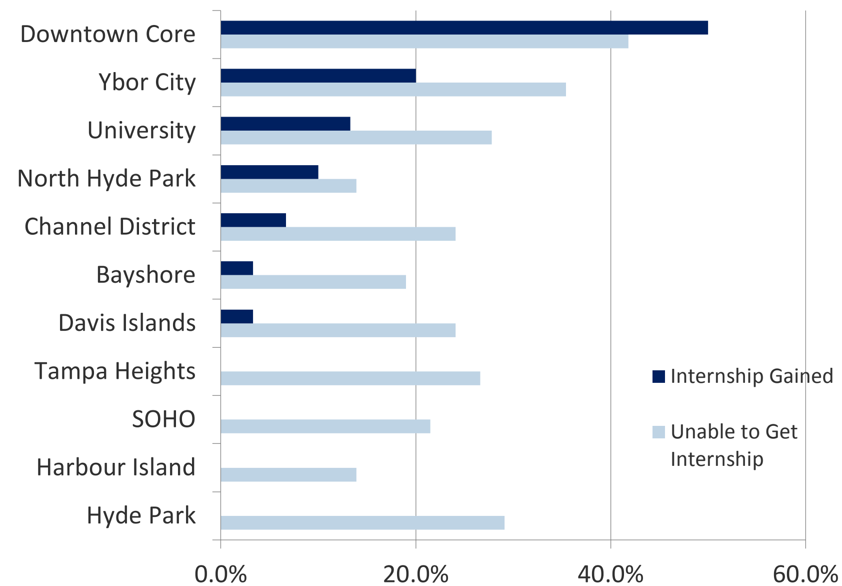
Internship

- Approximately 1 in 5 students have participated in an internship with a Downtown company.
  - Of those students, half secured an internship in the Downtown Core.
  - 41.8% hoped to secure an internship in Downtown but were unable.

Have you participated in an internship, in your career field at a Downtown company?



Location of Internship/Are there any areas where you hoped to land a position but were unable to do so?

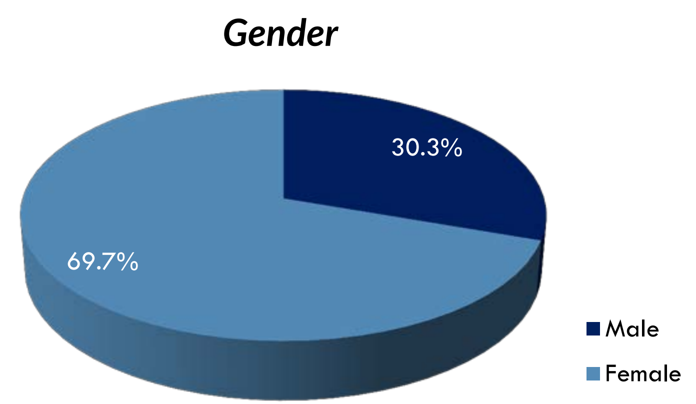


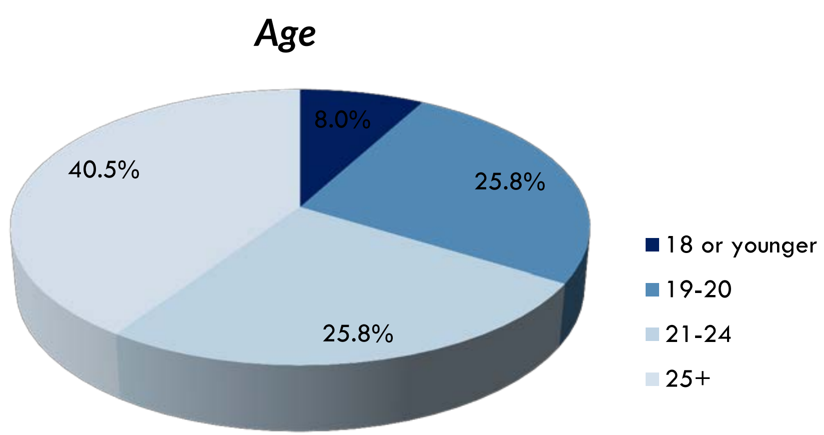
Downtown Tampa Changes

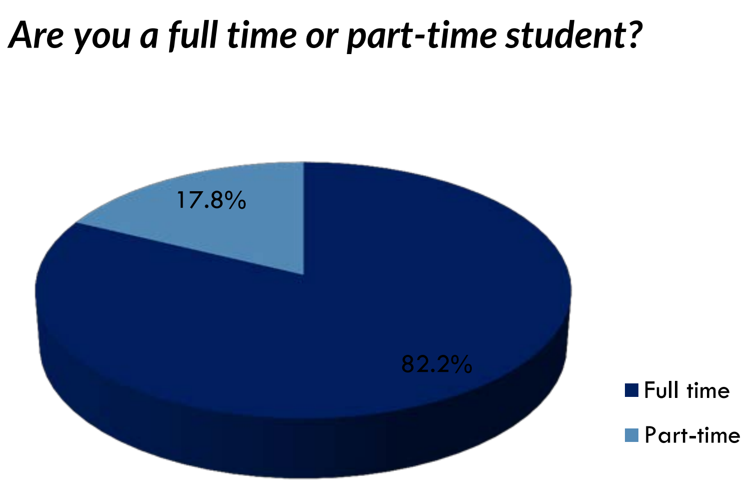
- Students were asked *What potential changes to Downtown Tampa would excite you?* Responses included:

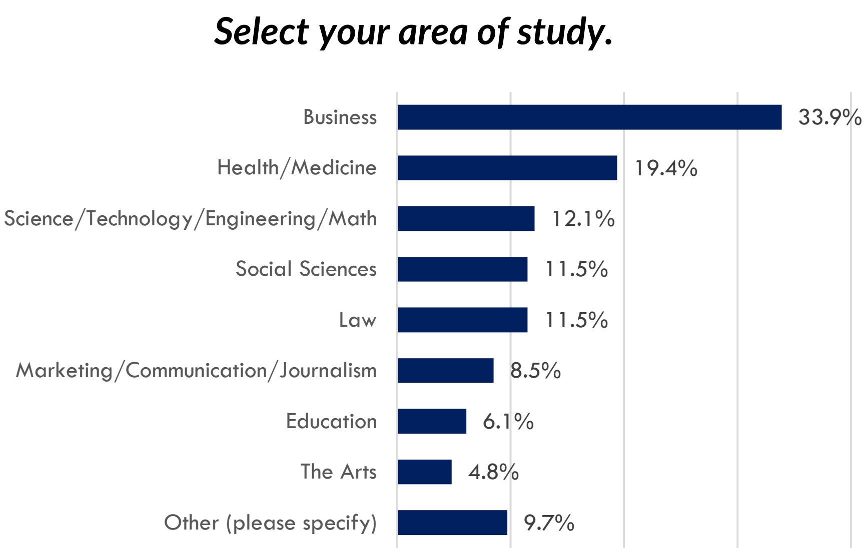
- *"More restaurants offering outdoor seating and a broader range of restaurants and cafes."*
- *"New Tampa Bay Rays stadium waterside and a shopping mall."*
- *"More shopping directed to college students."*
- *"A rehab of Channelside."*
- *"More groceries and affordable parking."*
- *"More things for young people to do besides bars and more art presence."*
- *"More food variety near campus, UT and USF."*
- *"Better safety, more police or security and better parking."*
- *"More things for children to experience in Downtown Tampa because it is a lovely city."*
- *"Express transportation and more shopping and dining options."*

Demographics









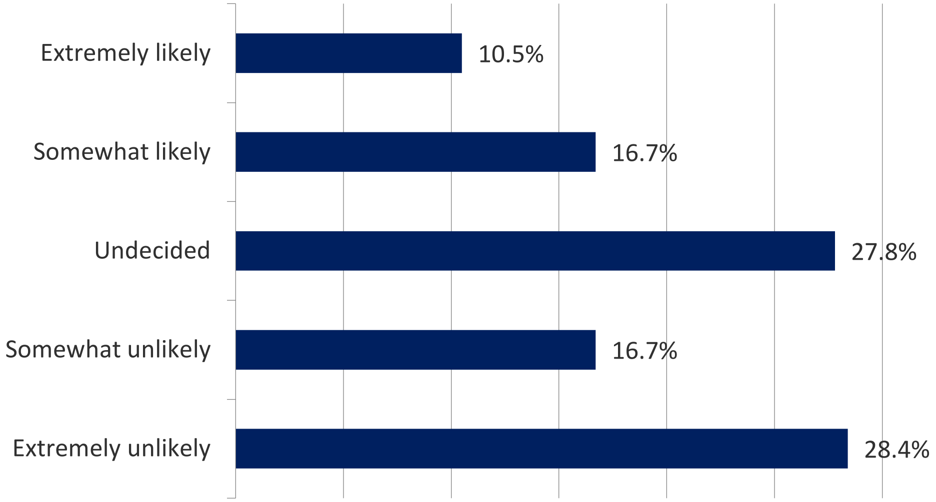
Likelihood of Remaining in Downtown

- Students offered highest 7-point scale recommendation of Downtown as a place to visit and go to school.
- Approximately 1 in 4 students identified as *likely* to remain living in Downtown Tampa following graduation.
- Another 1 in 4 are undecided on remaining in Downtown after graduation.

On a scale of 1-7, how likely would you be to recommend Downtown Tampa to friends and out-of-towners as a good place to do each of the following:

	Average on 7-pt scale
Visit	5.88
Go to school	5.84
Start a business	5.04
Reside post-graduation	4.74
Get an internship	5.38
Begin a career	5.35

How likely are you to remain living in Downtown Tampa following graduation?



Summary

- Student respondents included a mix of on-campus residents, renters within the Greater Downtown Tampa region, those living in a family residence, and owner-occupied. In large part, students are highly "seasonal." The population of students during summer months significantly drops off.

- The failure of a majority of students considering Downtown after graduation is concerning. A major driving factor shown through the data is a significant gap in expectation for affordable housing.

- Extrapolating from responses of time spent in downtown and low level of internships, there is an additional challenge of a lack of engagement with downtown. Internships are of interest, with high numbers of students indicating efforts to obtain internships in many areas throughout Greater Downtown Tampa to no avail. Socially, many students have visited a park or event once, but multiple visits/trips are significantly more uncommon.

- Students are attracted to Downtown by food—F&B diversity and hours were two areas of high importance to students and small expectation gaps. They additionally do not appear to see the bridge as a barrier, and instead a connector shown through their high ratings of Downtown Tampa's walkability.

Summary

- Students are big spenders, but most of that spending occurs outside of Downtown, from restaurants, to groceries, gas, clothing, personal services and entertainment. Half or more are making monthly visits to West Shore Plaza, International, Centro, Hyde Park Village, the Bay Plaza, Westfield Brandon and Ikea.

- Retail and personal services demands are not as strong among students as residents and workers, but were reported at fairly high levels for clothing, shoes, clinic care, mechanics and dry cleaning.

- Students are largely reliant on personal vehicles to get around Downtown. Those who do use alternative modes of transportation indicated high levels of satisfaction to all but HART bus service. Garage parking is most accessible to students and is equal to meter parking for affordability, though meter parking accessibility is a bigger challenge.