



**TAMPA**  
DOWNTOWN PARTNERSHIP

# **Biennial Downtown Tampa Worker and Resident Study 2022 Results**

Conducted by HCP Associates on Behalf of the Tampa Downtown Partnership



# Study Background and Methodology



## Study Established in 2008

Established as a baseline study;  
occurs biennially and is on the 8<sup>th</sup>  
iteration

## Participation higher than average

2022 resident count: 1,233  
90.3% increase from historic average

2022 worker count: 927  
12.8% increase from historic average

## Two online surveys

Participation encouraged through Monday  
Morning Memo, multiple media channels,  
and in-person activations

# Neighborhood Profiles



## Channel District

Median HHI: \$150,000 -  
\$199,999

Average Rent: \$2,464.20

Sample Size: n= 217

Tenure: Average Tenure



## Downtown Tampa/ Downtown River Arts

Median HHI: \$150,000 -  
\$199,999

Average Rent: \$2,463.52

Sample Size: n= 273

Tenure: Average Tenure



## Tampa Heights

Median HHI: \$100,000 -  
\$149,999

Average Rent: \$1,380.26

Sample Size: n= 168

Tenure: Average Tenure



# **Resident and Worker Profiles**

# Resident and Worker Respondent Profiles

35%

Have worked in Downtown more than 10 years

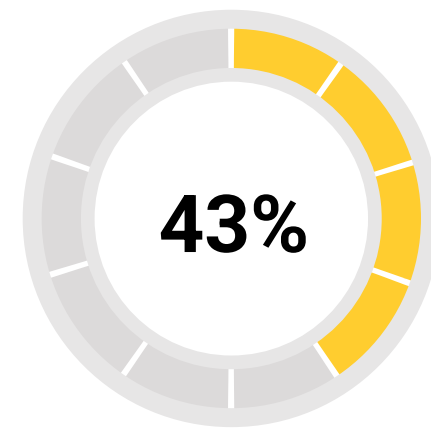


13%

Started working Downtown in the last year

## Work from Home

Remains a part of worker's routines:



Alternate between working remotely and going to work

Up 9% from 2020

42%

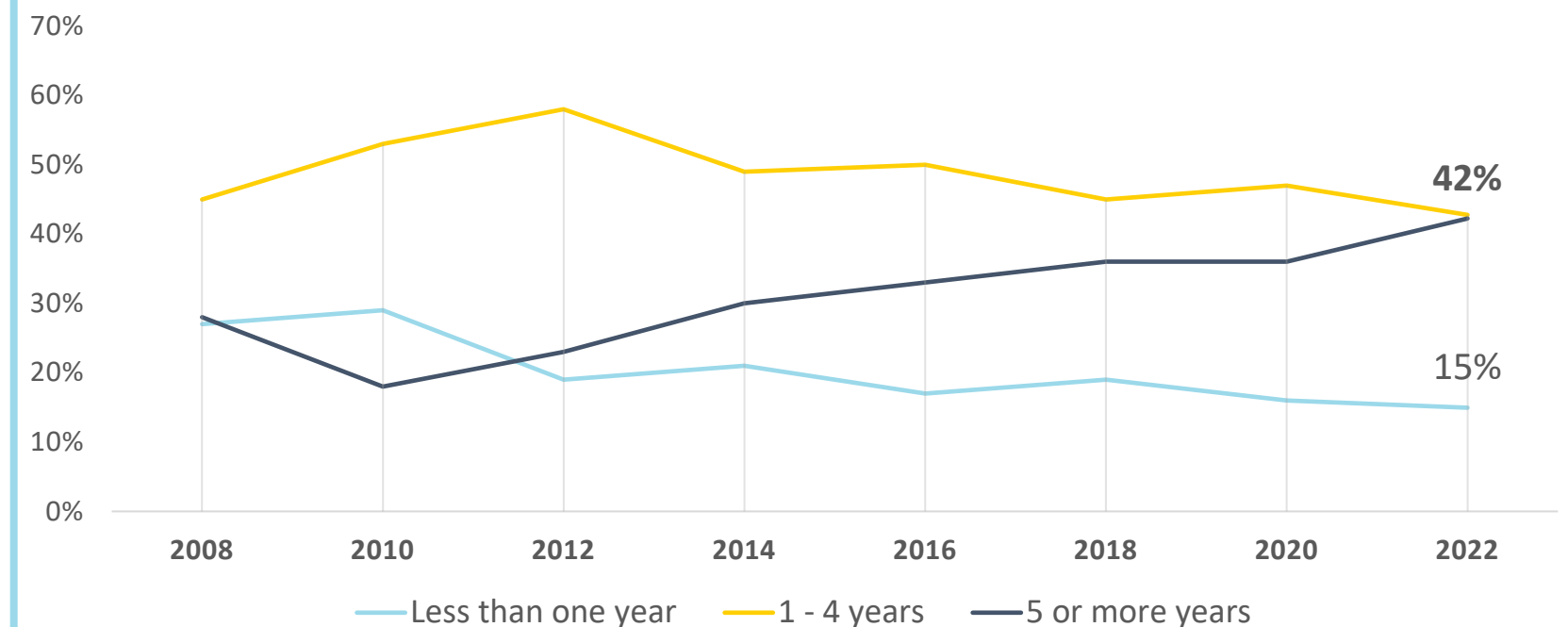
Have lived in their current Greater Downtown Tampa residence for more than five years



8%

Moved into their current Greater Downtown Tampa residence in the last year

Residents: How long have you lived in your current Downtown Tampa residence?



An aerial photograph of a city with various high-rise buildings and green spaces. A large, semi-transparent yellow circle is centered over the image. Inside this circle, the text "Residence Profiles" is written in a bold, dark blue font. The circle has a thin blue border.

# **Residence Profiles**

# Neighborhood Characteristics



Channel District residents report the greatest satisfaction with safety

Cleanliness levels are relatively similar across the greater Downtown Tampa area, though Channel District received the lowest score from its residents

Tampa Heights residents report the greatest satisfaction with café and restaurant selection

Tampa Heights and Channel District report the greatest sense of community

## Concerns from the Neighborhoods



Channel District: Pet Waste/Cleanliness



Tampa Heights: Mobility and Personal Safety



Downtown Tampa/Downtown River Arts: Personal Safety and Homelessness



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# Housing Facts

- Residents -

**51%**

**of residents own their homes**

This figure increased substantially with the addition of Tampa Heights to the study

- Residents -

**80%**

of renting residents would like to own their place

- Both Groups -

**\$2,502.81**

**Resident maximum monthly rental rate**

**\$2,459.18**

**Worker maximum monthly rental rate**

- Workers -

**47%**

of workers still do not want to move downtown because they prefer the suburban lifestyle

- Workers -

**71%**

of workers who do express a desire to relocate said that they would want to own their home

**Affordable and attainable housing remain challenges for Downtown**

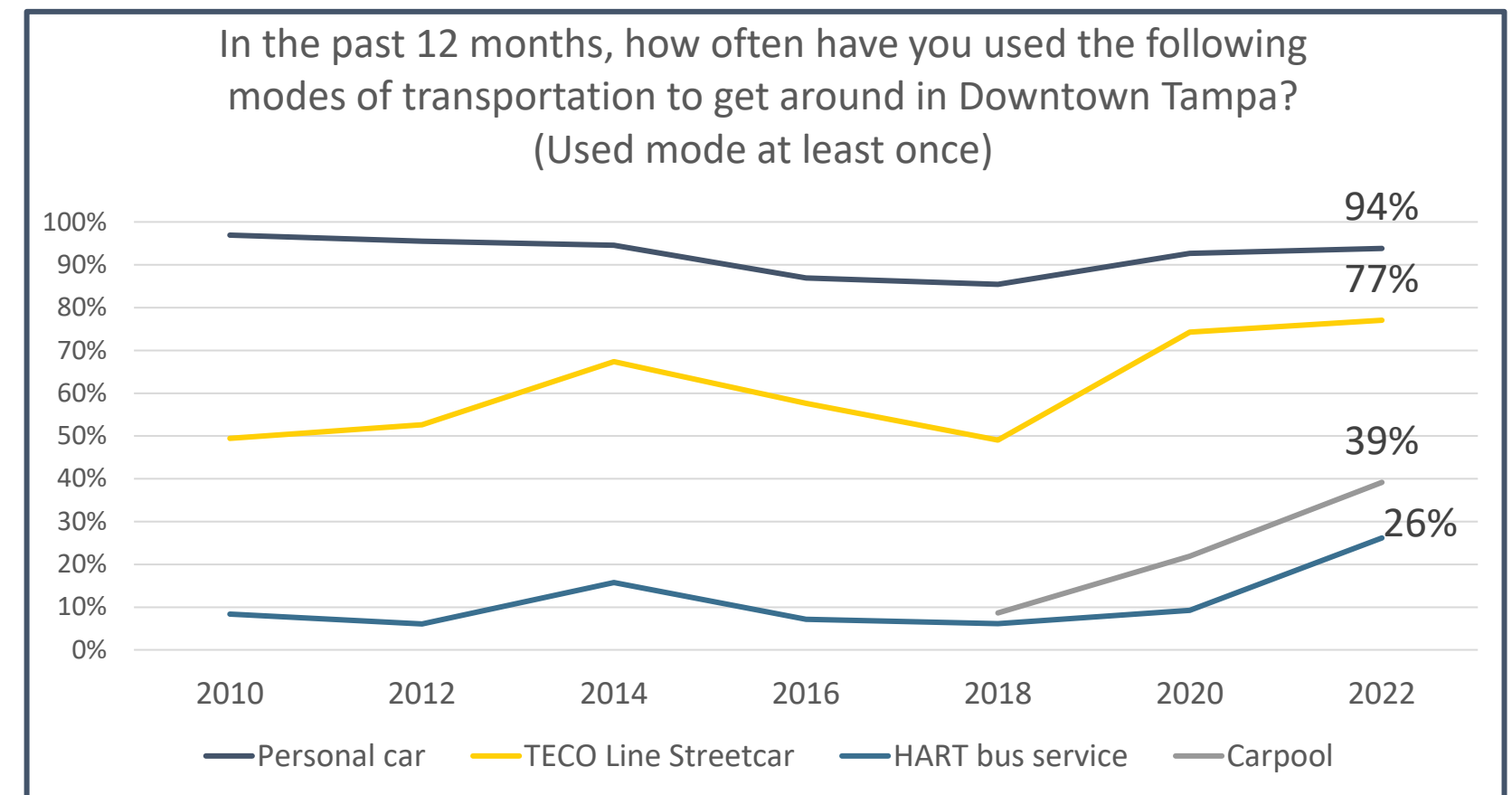
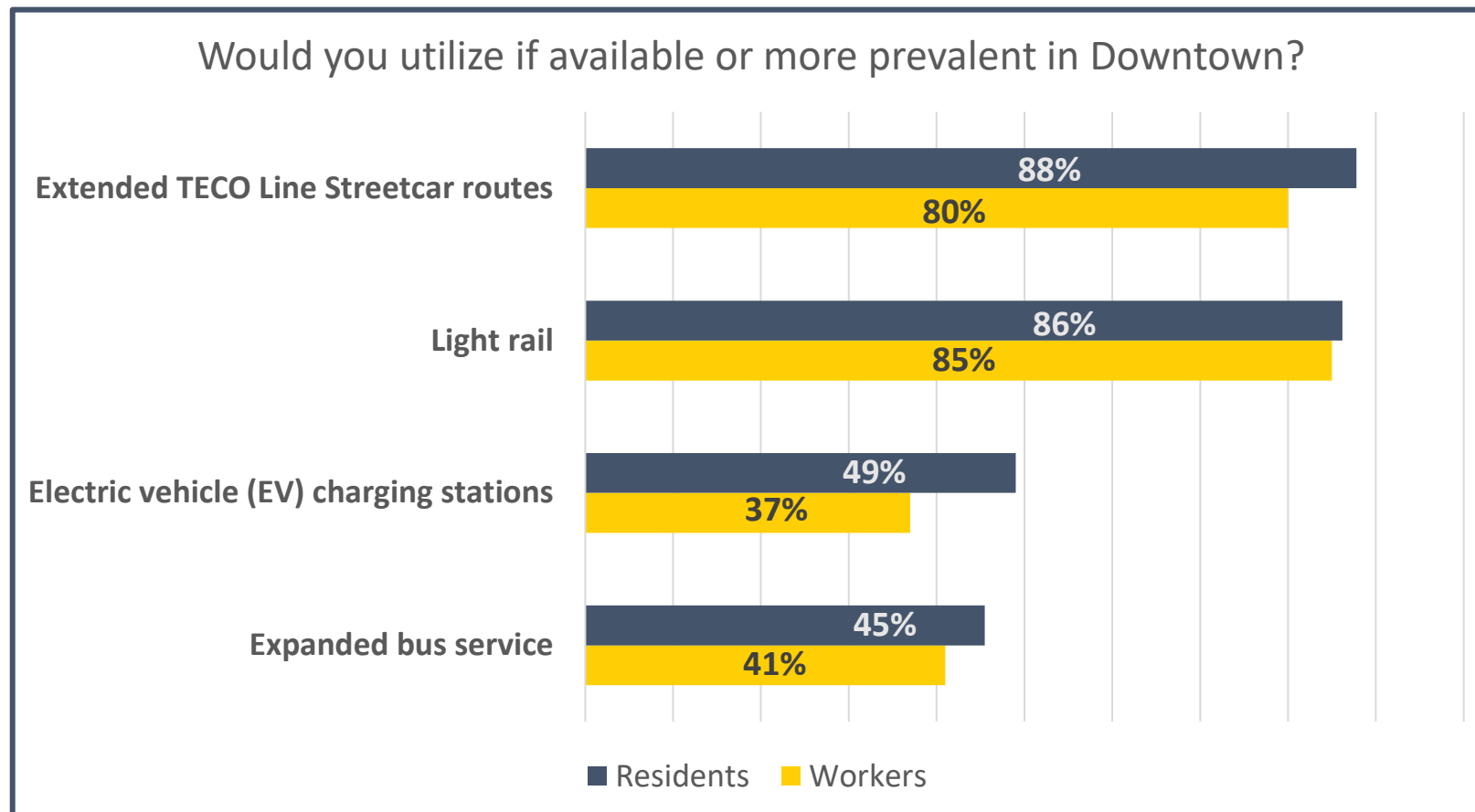
**Both residents and workers agreed that Downtown is not ideal for low-income and working-class people**





# **Getting Around Downtown**

# Transit *and* Transportation



Bus Routes

**45% of residents report they would use expanded bus routes; +15% from 2020**



Improvements

**A quarter of workers and residents report transit as Tampa's greatest area for improvement**



Streetcar

**Of those using the Streetcar, 78% of residents and 75% of workers would still use it if it required a fee**



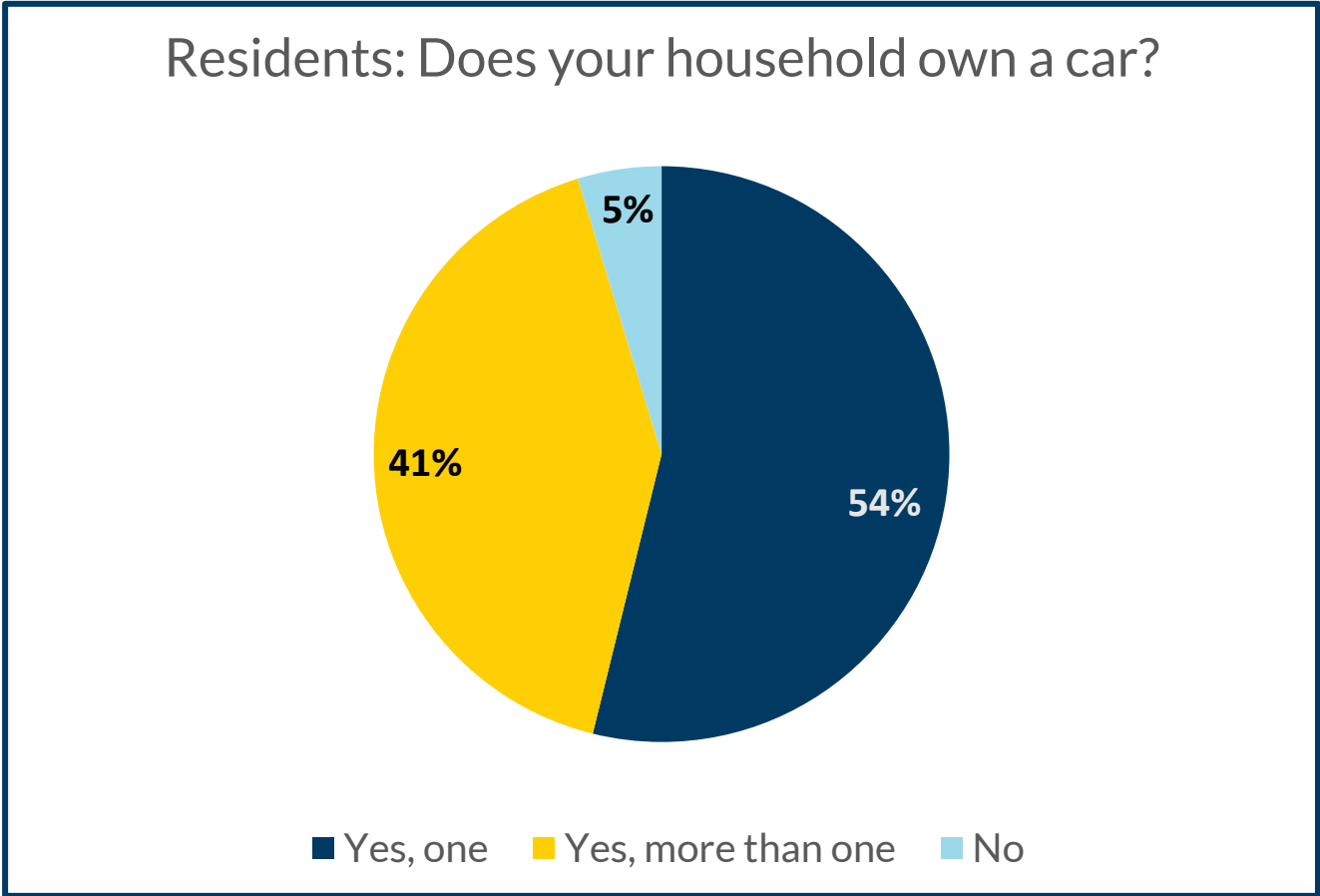
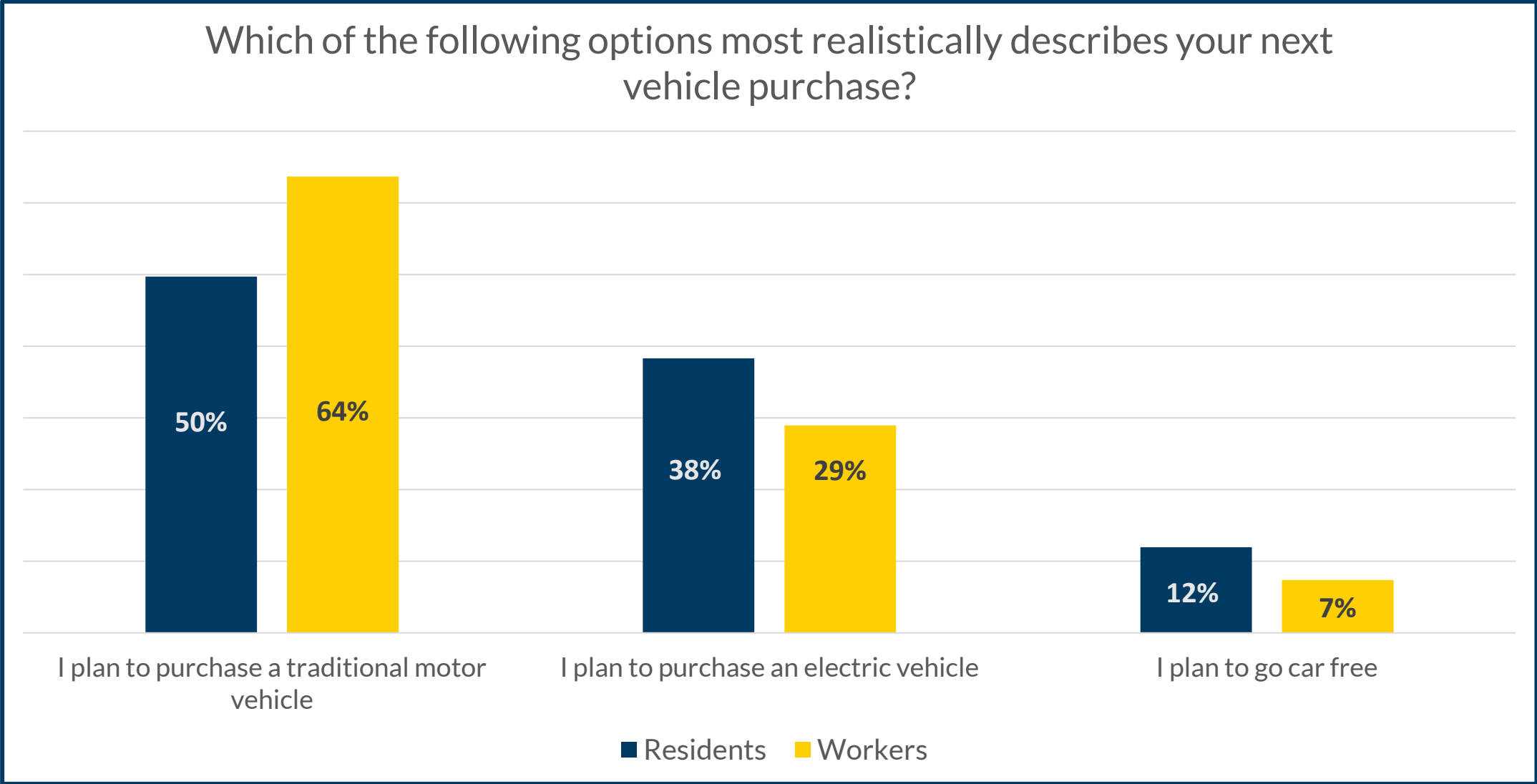
Mobility Constraints

**Mobility constraints was the 2nd most mentioned insufficient aspect of Downtown Tampa**

# Electric Vehicles and Car-Free Living

There has been an **11-percentage point increase** since 2020 in the number of Downtown residents who plan on buying an electric vehicle as their next car

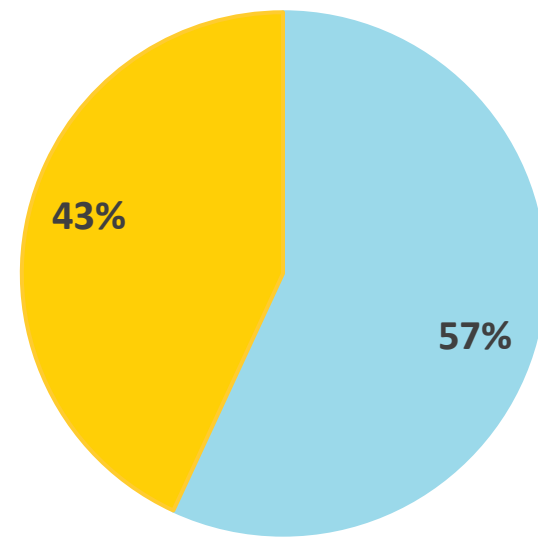
Downtown's residents are moving away from multiple cars; there was a **9-percentage point drop** since 2020 in the number of households who have more than one car.



# Parking and Commutes



Workers: Select your preferred option:

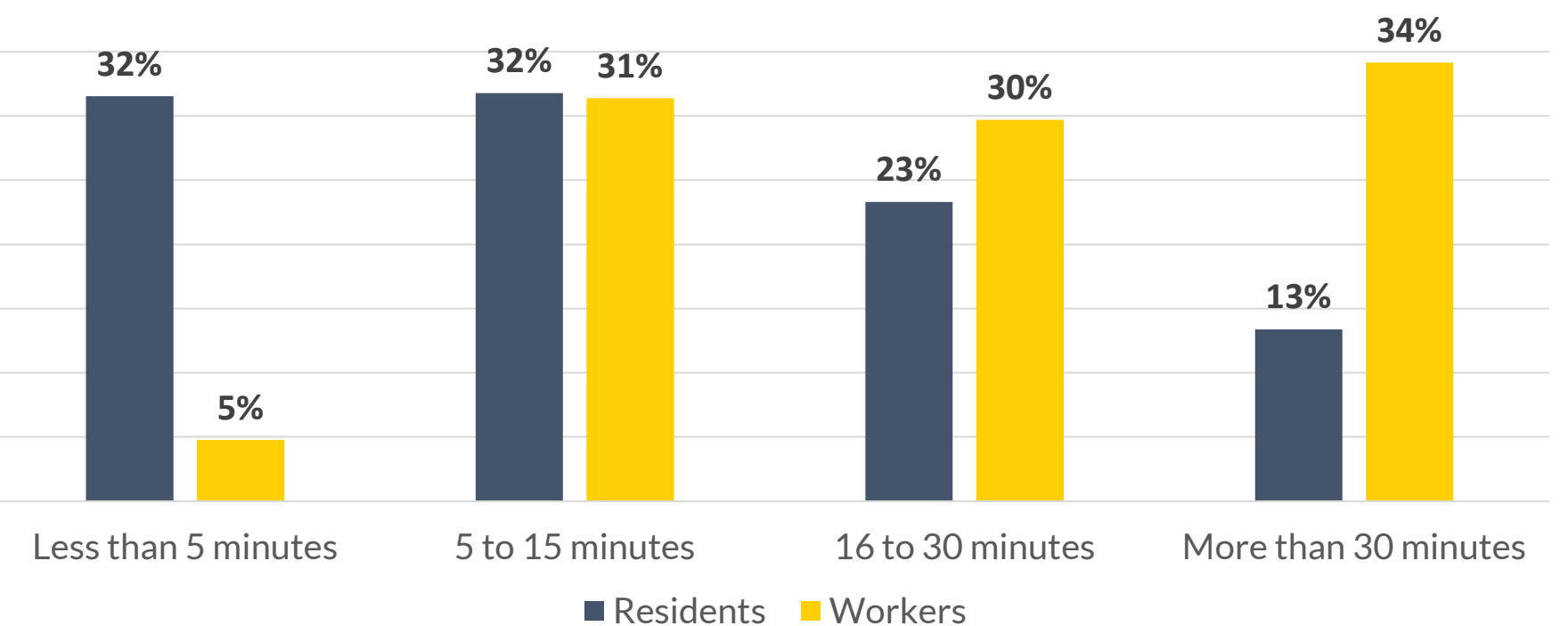


- Pay more to have a parking space closer to my destination
- Pay less to have a parking space further away from my destination

Residents (37%) and Workers (34%) mentioned issues with the **price of parking** most often in open-ended comments

Workers were more likely to identify that **parking was insufficient** for their needs in Downtown Tampa

How long is your typical commute to work?



The image features a bright, sunny outdoor setting, likely a rooftop terrace or plaza. In the foreground, there's a paved area with a brick pattern. To the left, a group of people is seated at tables under a covered patio area with string lights and blue umbrellas. A young tree stands in the middle ground. To the right, a modern building with a balcony and a sign that says "ECLIPSE" is visible. The entire scene is overlaid with a large, semi-transparent yellow circle that has a white border. Inside this circle, the text "Lifestyle and Activation" is written in a bold, dark blue font.

# Lifestyle and Activation

# Tampa Riverwalk: Downtown's Greatest Asset

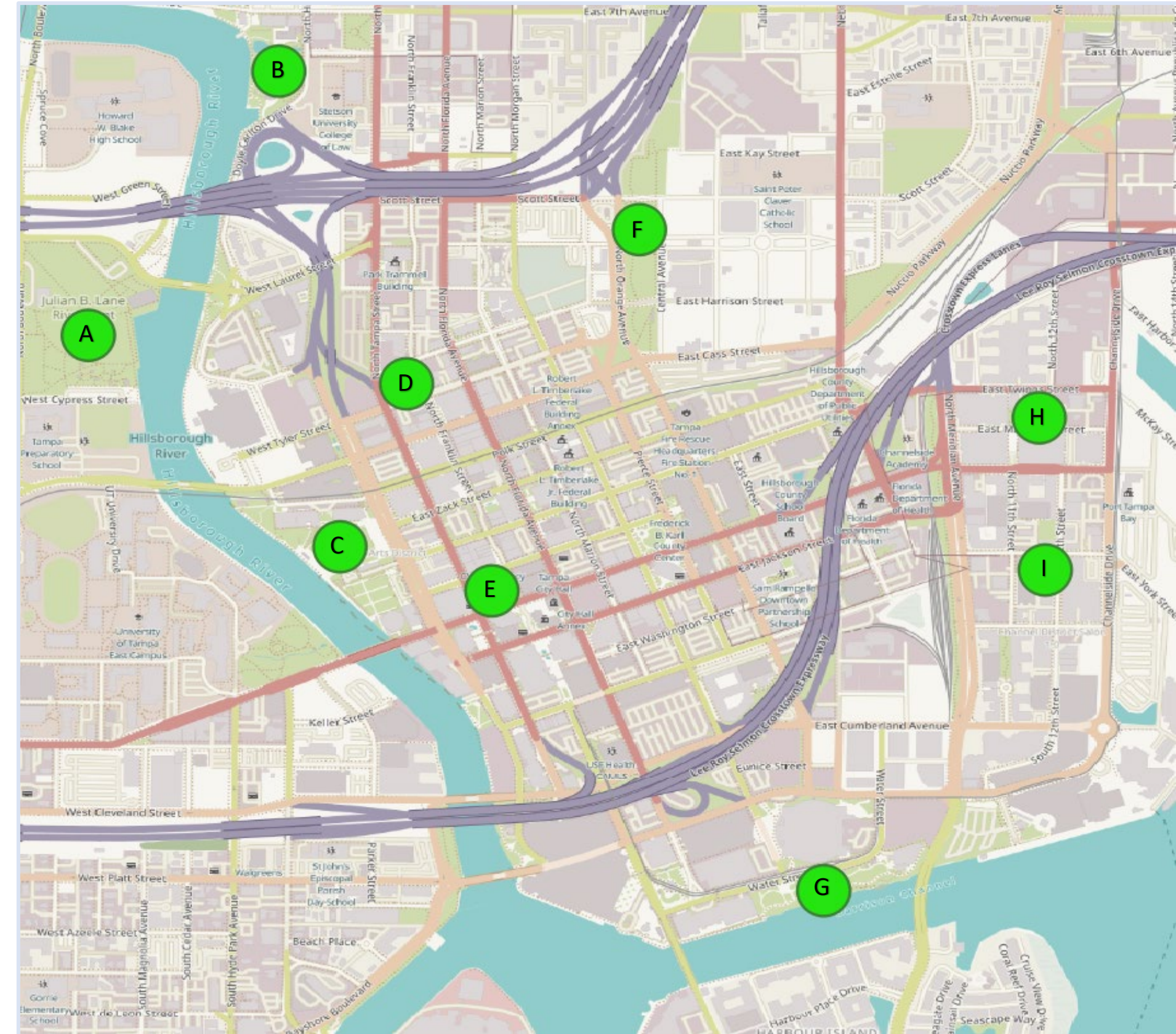


- **Riverwalk remains the top asset**  
The Riverwalk was identified by residents and workers as the greatest asset of Downtown Tampa. Additionally, the Riverwalk was identified as the greatest asset by each of our key neighborhoods.
- **Desire for an Extended Riverwalk**  
More than 9 in 10 respondents, for both residents and workers, reported they would likely utilize an extended Riverwalk.

# Parks in Downtown

How satisfied are you with the parks you visit?  
Rate where 1 is very unsatisfied and 5 is very satisfied.

Key	Park	Resident	Worker	Callout
A	Julian B. Lane Riverfront	4.04	4.12	More shade
B	Water Works	4.02	4.07	Family park
C	Curtis Hixon Waterfront	4.00	4.08	Love events
D	Herman Massey	3.37	3.52	Gen. Improvements
E	Lykes Gaslight Square	3.53	3.58	Homelessness
F	Perry Harvey	3.68	3.77	More activation
G	Cotanchobee Fort Brooke	3.66	3.70	Construction
H	Madison Street	3.69	3.61	Gen. Improvements
I	Washington Street	3.56	3.63	Pet friendly

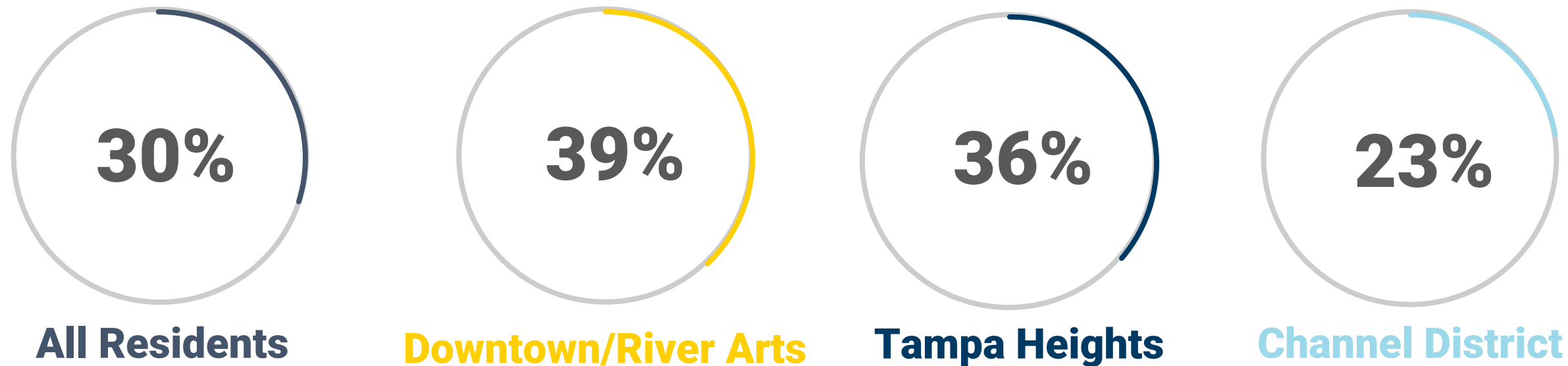


- **Downtown's parks** are popular
- Residents and Workers feel that **general improvements** are needed to make the parks more welcoming places
- This includes the condition of the **grass**, more **shaded areas**, and more **activation**

# Homelessness and Safety

In your experience in Downtown Tampa, how often have you had to adjust your behavior – such as avoiding certain areas, crossing the street out of worry, or other preventative steps?

Residents adjust their behavior more depending on the part of the city:



**Homelessness and safety are the greatest concern for residents in Downtown Tampa and Downtown River Arts**

In open-ended feedback, residents of Downtown Tampa/Downtown River Arts reference homelessness (15%) and personal safety (18%) as two areas for improvement.

These areas were referenced significantly less by residents of Channel District and Tampa Heights



Women (45%) and those who are aged 25 or less (34%) are more likely to adjust their behavior

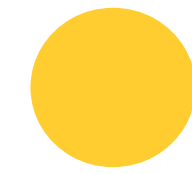
Homelessness and Safety are also major concerns at some of the parks in Downtown Tampa

This includes Lykes Gaslight Square Park, Perry Harvey Park, and Herman Massey Park





# Big Box Retail Request



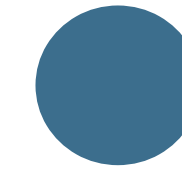
**Target** remains the most desired big box store for residents and workers

Residents: 38%

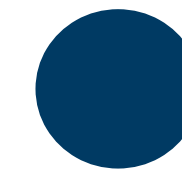
Workers: 45%



Residents are **more satisfied** with retail, dining, and grocery options available in Downtown Tampa than in 2020



However, more than a quarter of residents (26%) and workers (29%) report **NOT** wanting any big box store in Downtown Tampa



Satisfaction changes by neighborhood

**Tampa Heights** residents are the most satisfied with the retail and dining options offered



# Looking Ahead



# Future Opportunities

## Hybrid Work

43% of workers reported alternating between working from home and going in to work

This comes alongside workers reporting leaving the office less often to get lunch or run errands

## Homeownership and Affordability

Access to affordable housing is increasingly insufficient for residents and workers

Housing prices in Downtown Tampa are the number one reason why some workers are not interested in moving downtown

## TECO Streetcar

More residents and workers are using the streetcar

Both residents and workers are highly satisfied with their experience riding

Most residents and workers would still use the streetcar if a fee was required, but ridership would decline





# Enduring Strengths



## Tampa Riverwalk

The Riverwalk remains Downtown Tampa's greatest asset according to residents (35%) and workers (37%)

Strong desire for an extended Riverwalk from residents (91%) and workers (93%)



## Accommodating Groups

Workers and residents believe that Tampa is accommodating to a variety of groups, with young professionals, tourists, and pet owners being some of the top groups



## Recommendation

Remain at extremely high levels

93% of residents are likely to recommend Downtown Tampa to their peers as a place to live

92% of workers recommend Downtown Tampa as a place to work

# Thank You!

If you have any questions regarding the study, feel free to contact us at **813-318-0565** or submit your question through our contact form at [www.hcpassociates.com/contact](http://www.hcpassociates.com/contact).

