



**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

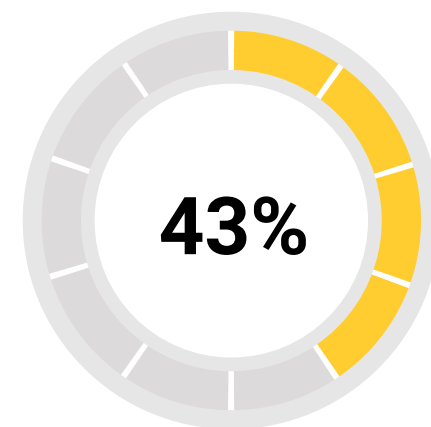


13%

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%

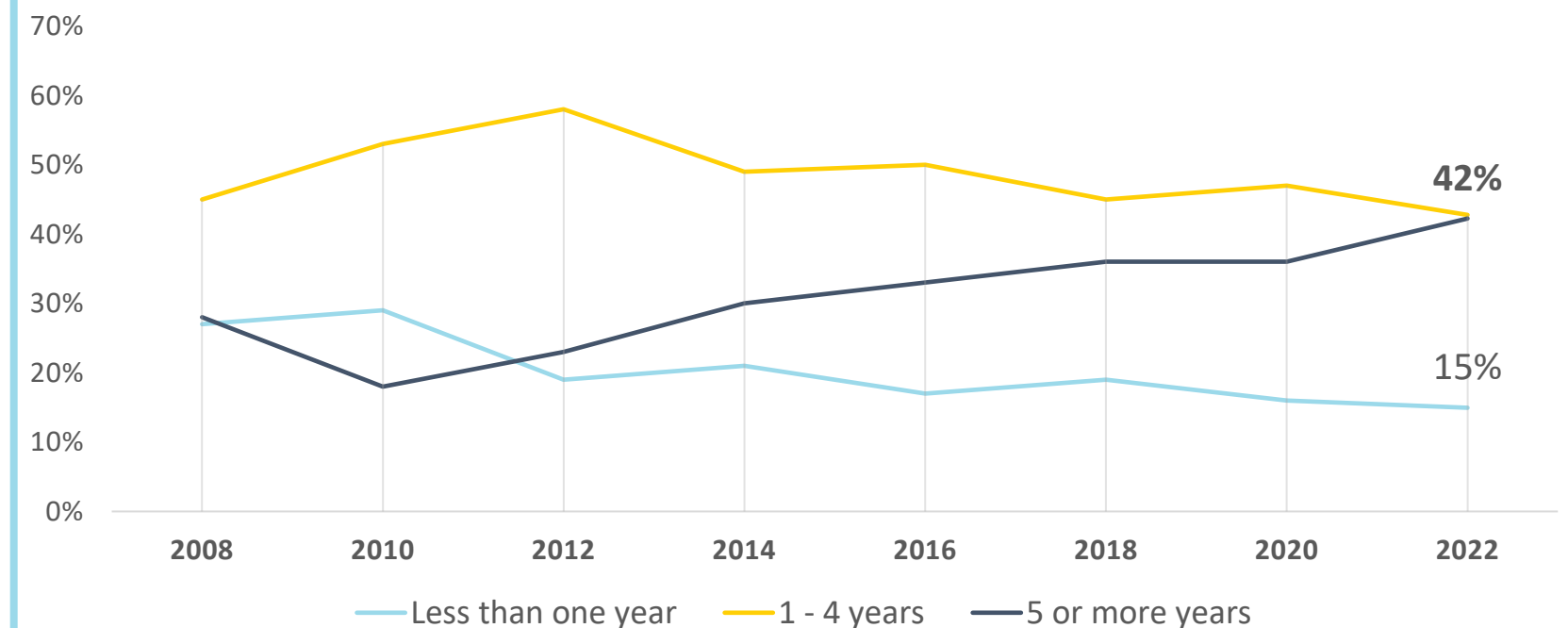
Have lived in their current  
Greater Downtown Tampa  
residence for more than five  
years



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 skyline, featuring various high-rise buildings and a mix of urban architecture. A large, semi-transparent yellow circle is centered over the image, containing the title text. The background shows a clear sky with some clouds and a distant horizon.

# **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



# 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**



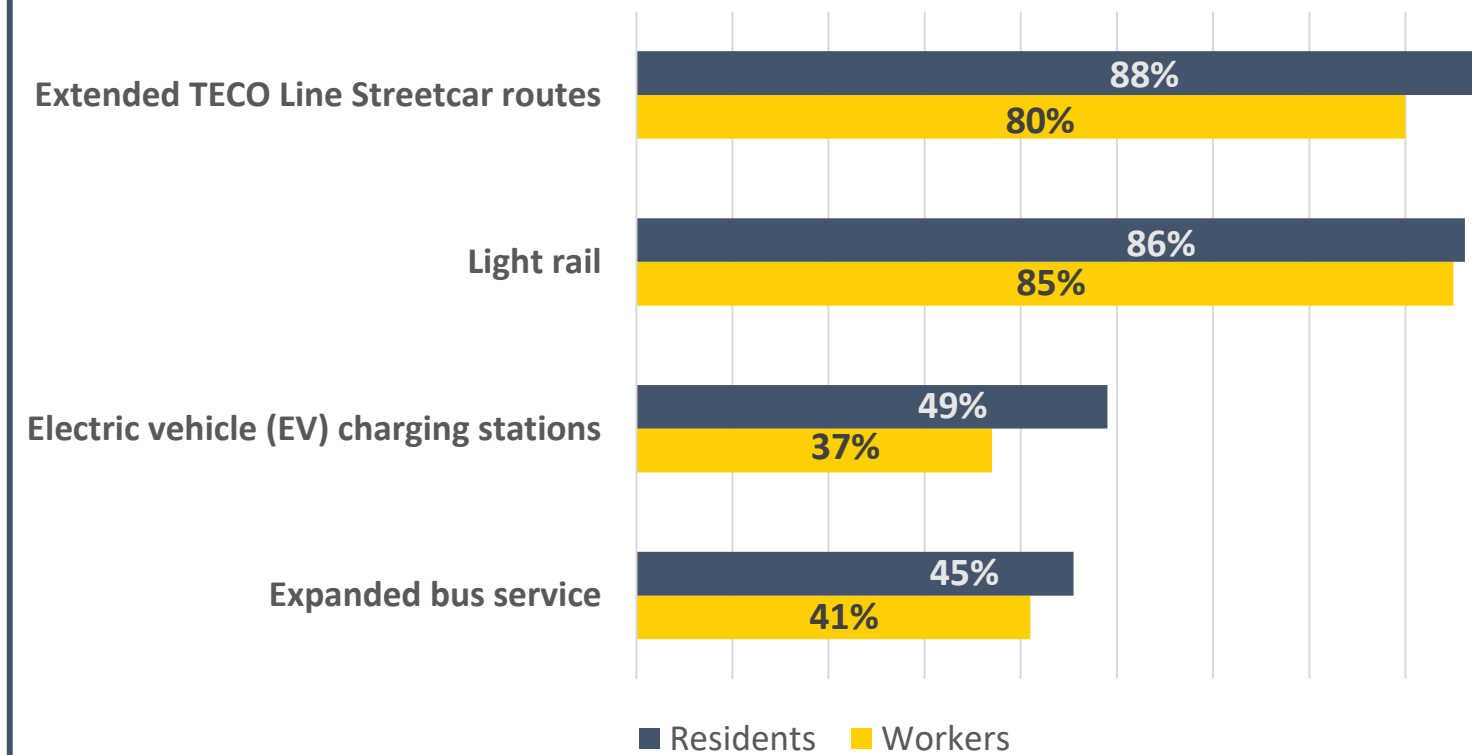


# **Getting Around Downtown**

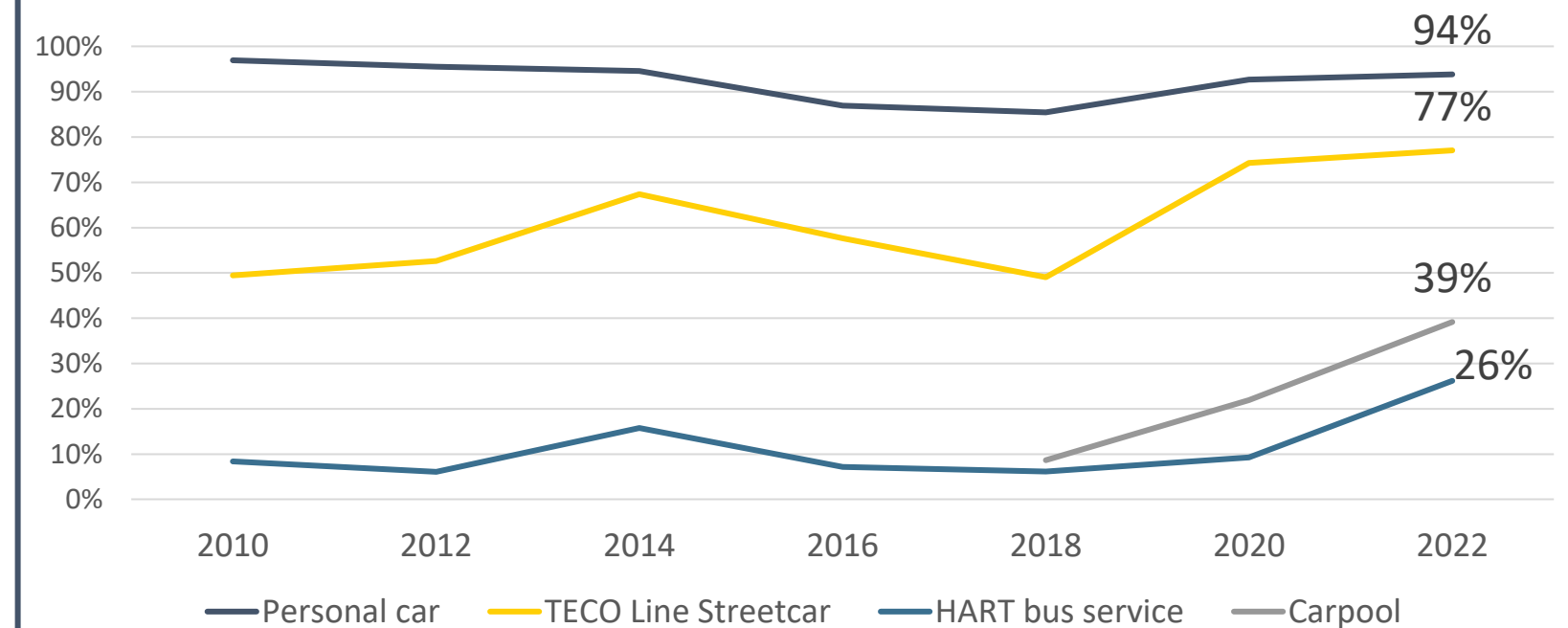


# Transit and Transportation

Would you utilize if available or more prevalent in Downtown?



In the past 12 months, how often have you used the following modes of transportation to get around in Downtown Tampa?  
(Used mode at least once)



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



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



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



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



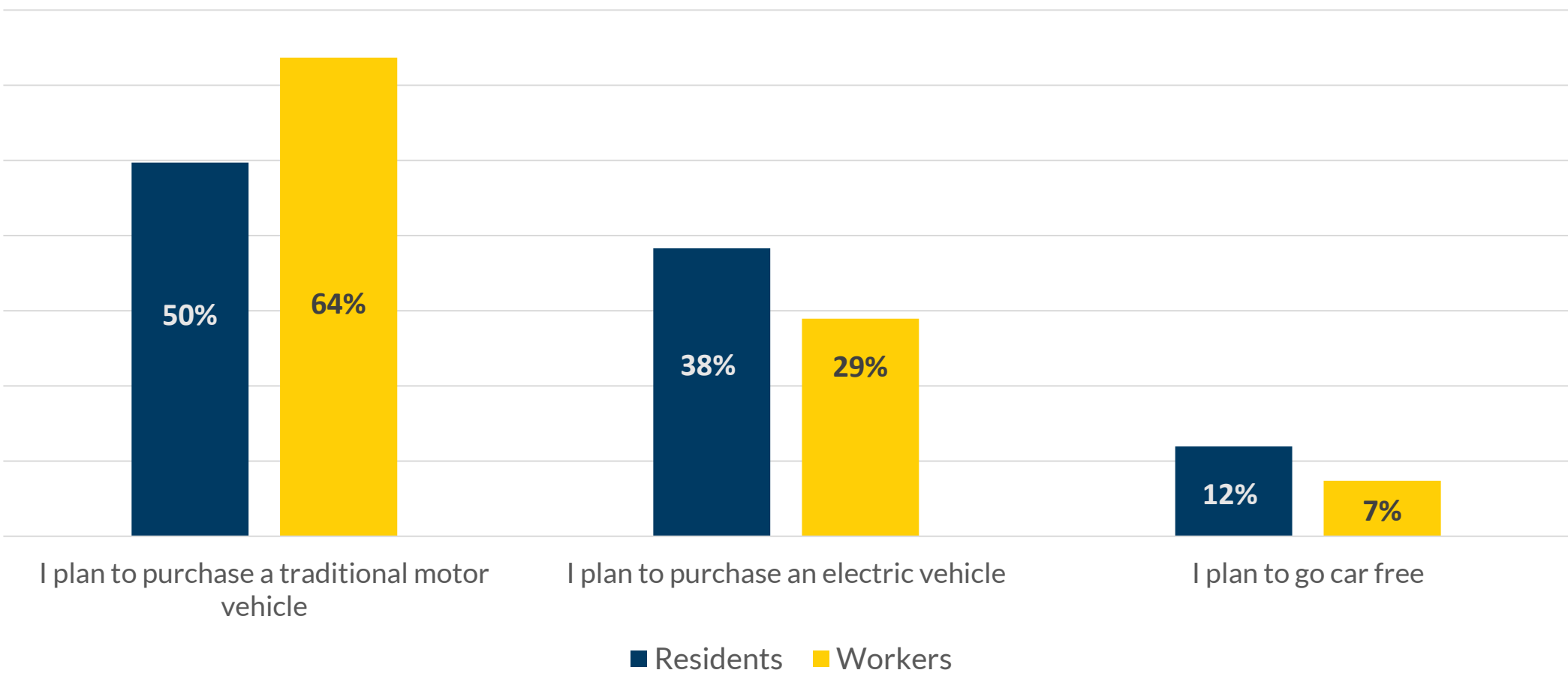
# Electric Vehicles and Car-Free Living

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

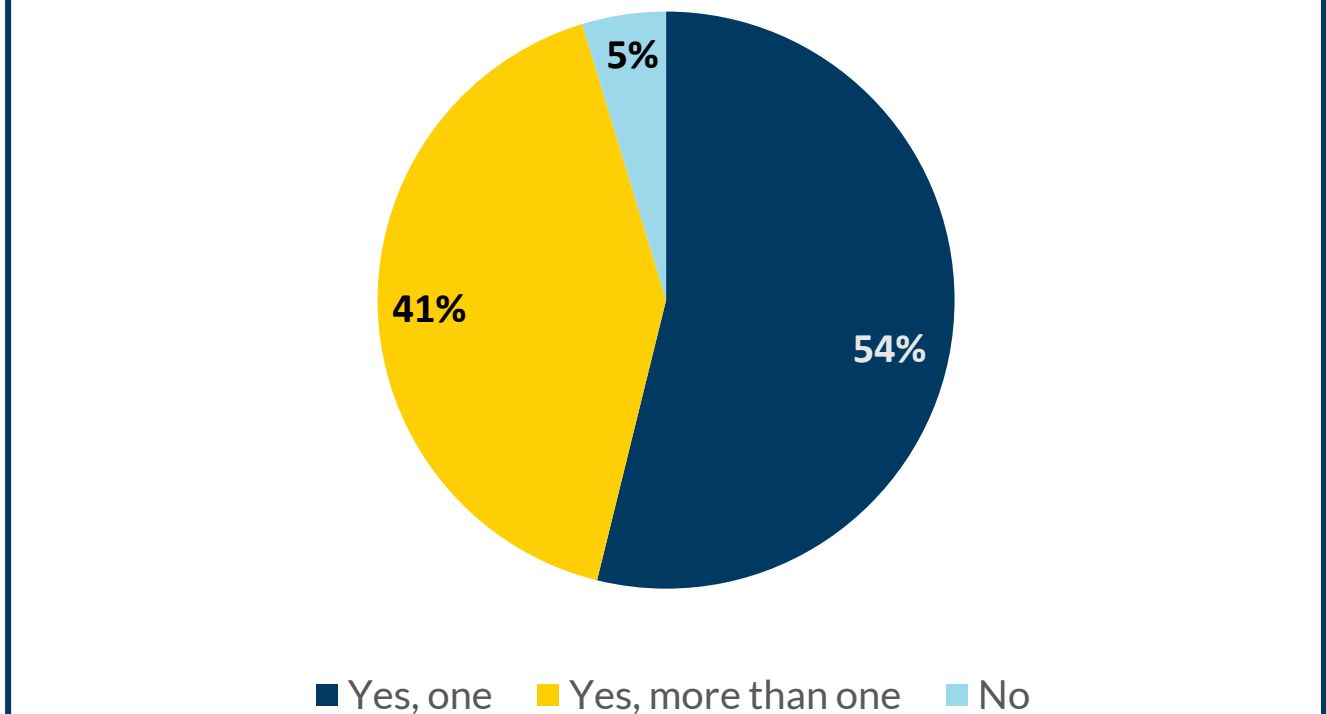
Downtown’s residents are moving away from multiple cars; there was a 9-percentage point drop since 2020 in the number of households who have more than one car.



Which of the following options most realistically describes your next vehicle purchase?



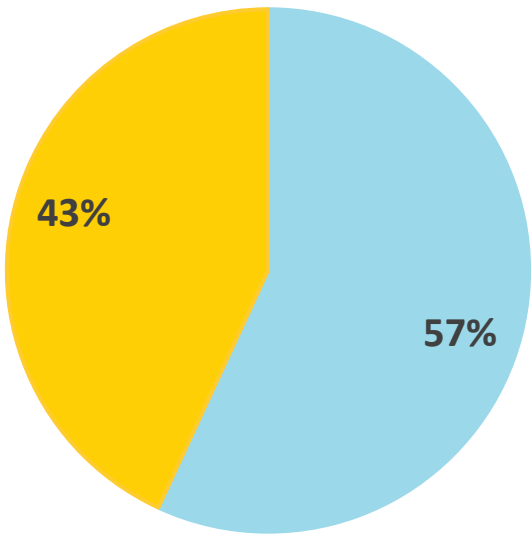
Residents: Does your household own a car?





# Parking and Commutes

Workers: Select your preferred option:



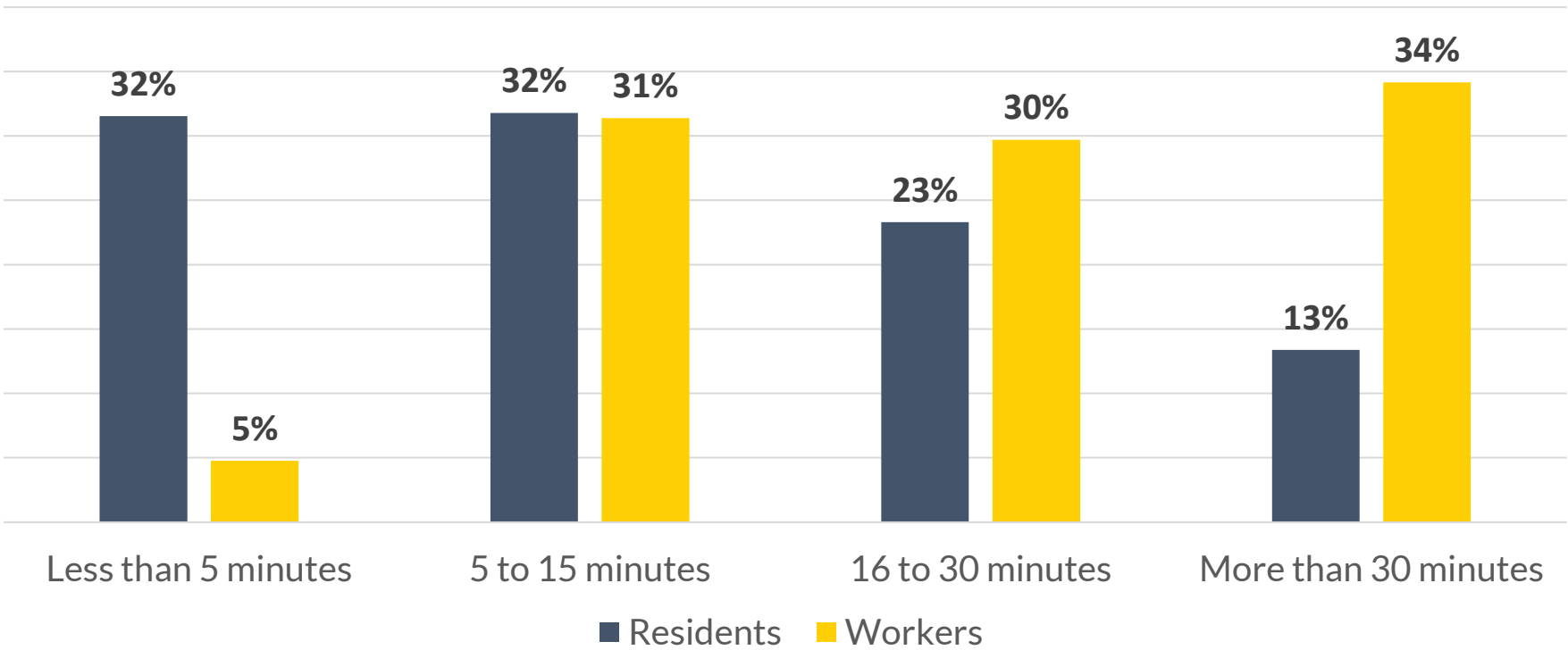
- Pay more to have a parking space closer to my destination
- Pay less to have a parking space further away from my destination



**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 background image shows a modern urban plaza with a paved ground, trees, and buildings. A large yellow circle is overlaid on the image, containing the text. The scene includes outdoor seating with blue umbrellas on the left and a building with a sign that says "ECOR NEWS" on the right. People are walking and sitting in the plaza.

# **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.

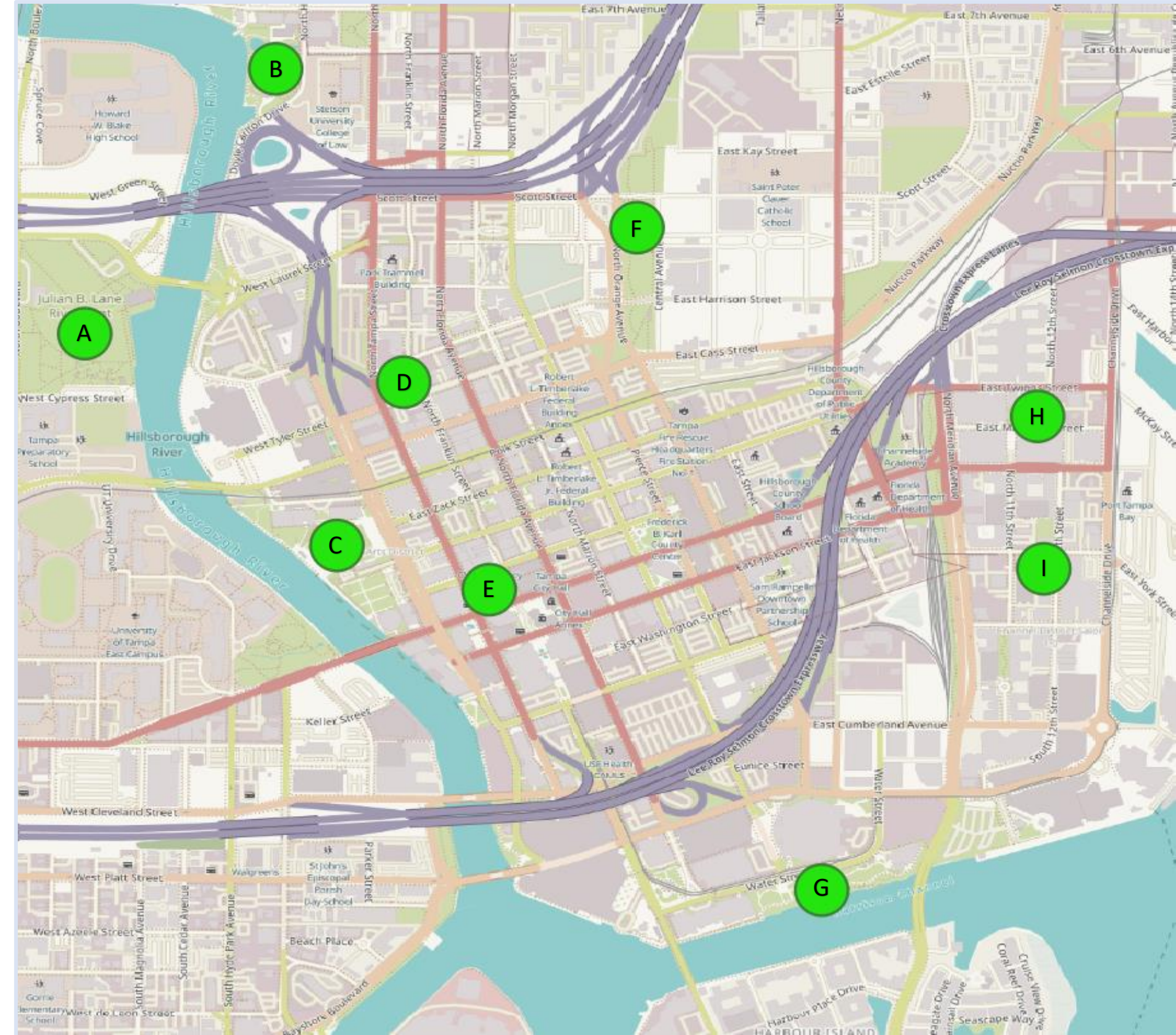


# Parks in Downtown

**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**

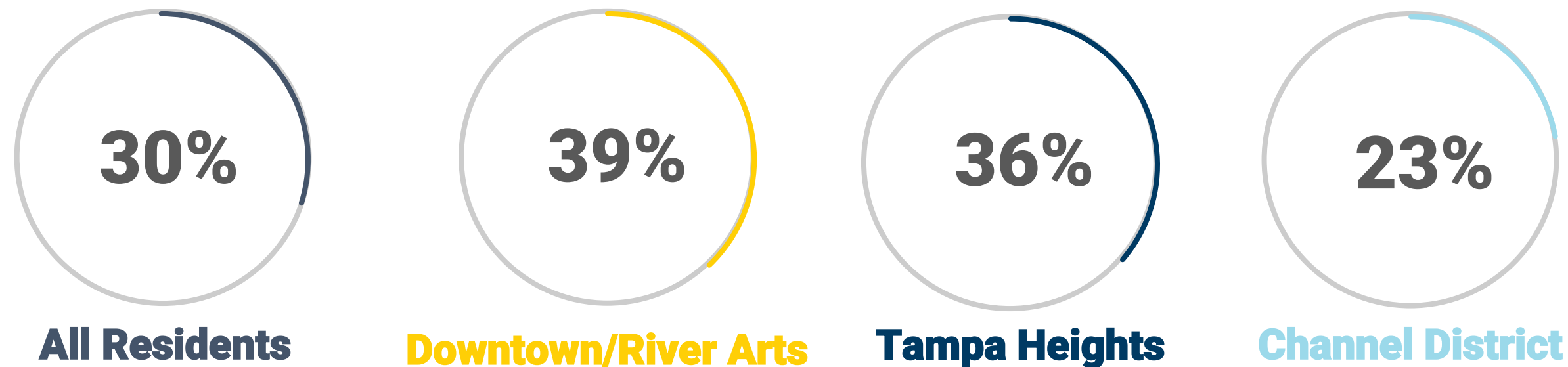




# Homelessness and Safety

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%

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

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

Satisfaction changes by neighborhood

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







# Looking Ahead





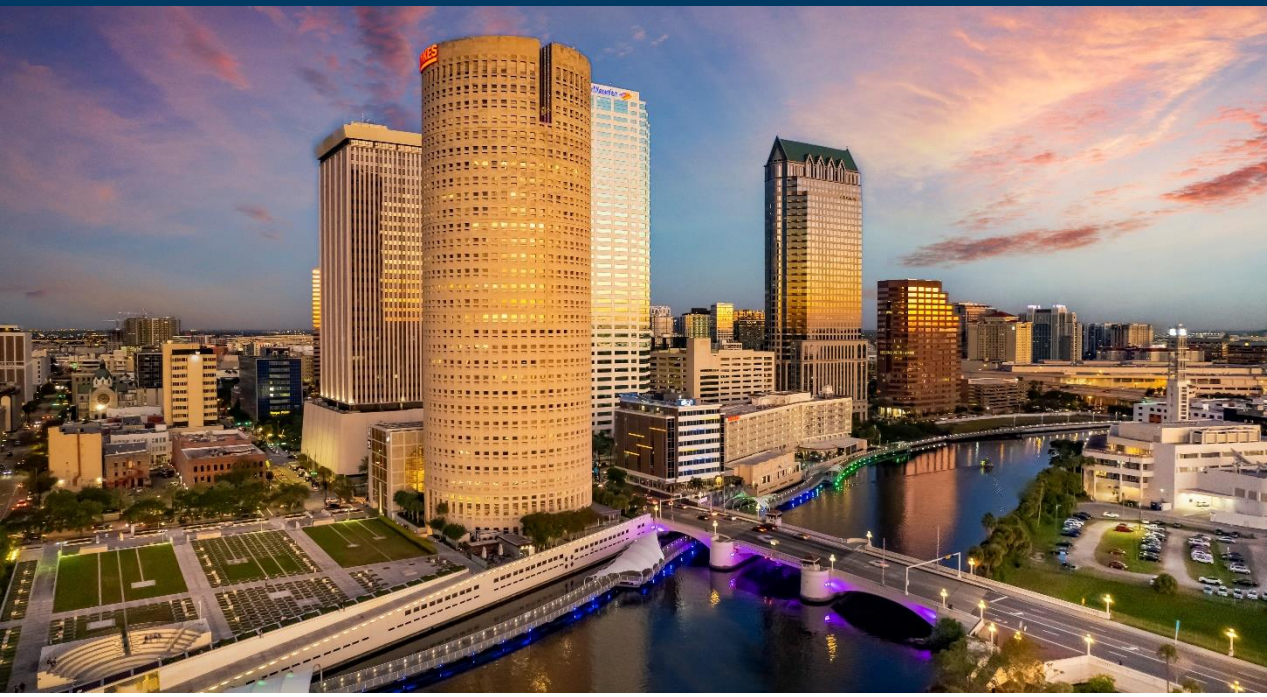
# Future Opportunities



## 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).

