

2020 Community Values Survey



Introduction

Baseline study for the City of Tampa's community priorities

Goal: to obtain statistically valid information that is reflective of the diverse demographics of the City and its various communities

Additionally, the survey explored topics pertaining to *Transforming Tampa's Tomorrow (T3)*:

- Transportation
- Workforce Development
- Housing Affordability
- Sustainability and Resilience

Methodology

Total respondents: **1,301** City of Tampa residents aged 18+

Margin of error: $\pm 2.71\%$ at a 95% confidence level

Data collection: **July 15, 2020** through **August 4, 2020**

Average length of survey: **11 minutes**

Four respondent demographics were controlled: **age, gender, race/ethnicity,** and **educational attainment**

Regional Groupings

The sample was divided into six regions, yielding a margin of error of $\pm 6\%$ within each region

**Downtown /
Channelside/
Harbor Island**

• 216 respondents

New Tampa

• 220 respondents

**East Tampa /
Ybor / the
Heights**

• 215 respondents

**University /
Sulphur
Springs**

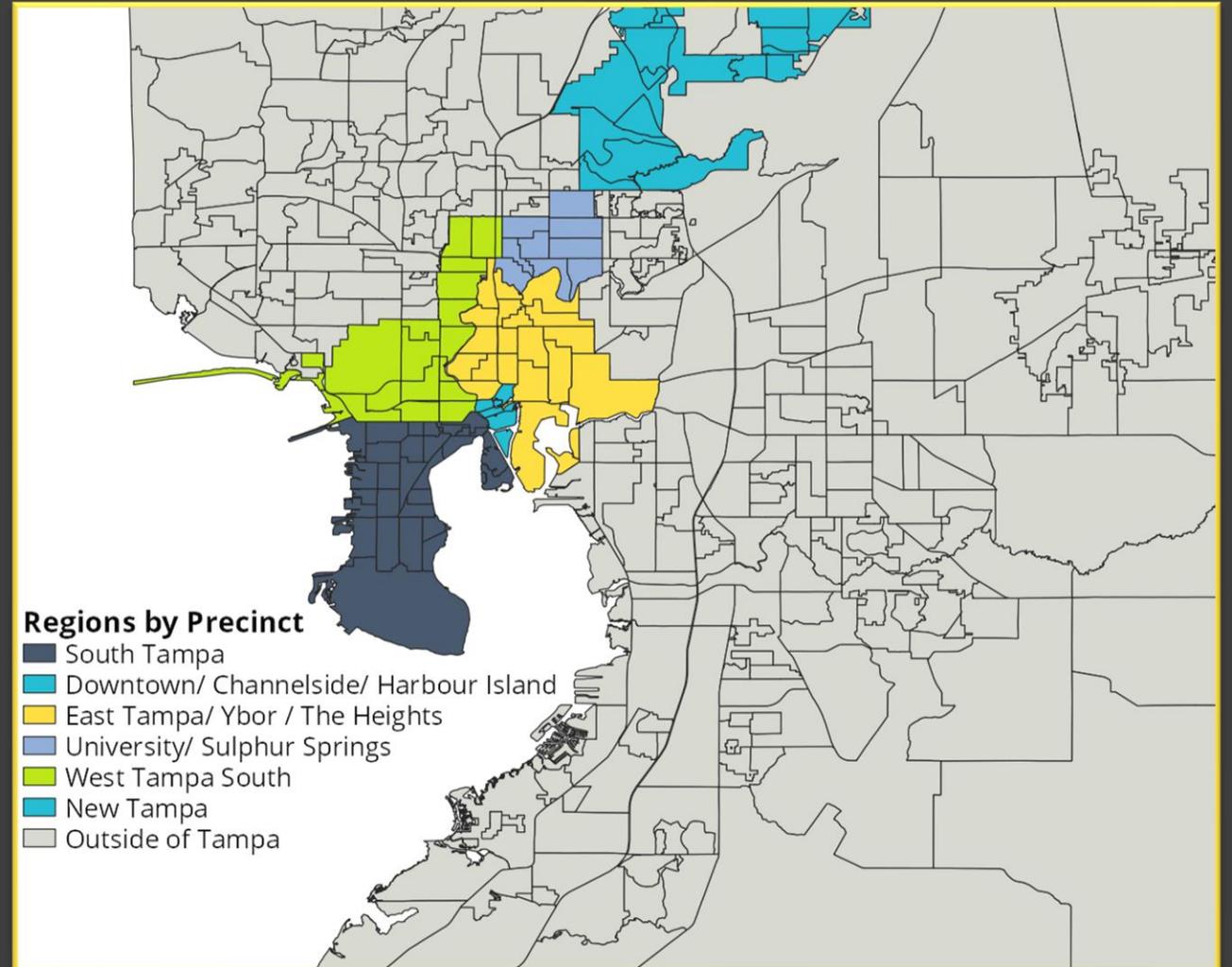
• 217 respondents

South Tampa

• 215 respondents

West Tampa

• 218 respondents



Expectation Gaps

 Affordable housing choices	 Greenspaces, parks, and public spaces
 Housing options near where I work	 Accessible and timely waste management
 K-12 education	 Flood prevention
 After-school programs	 Bicyclist and pedestrian safety
 Sense of personal safety	 Quality roads
 Diversity, equity and inclusion	 Public transit options
 Sense of community	 Smooth traffic flow on major roads
 Cleanliness of public spaces	 Parking availability
 Cultural events, social activities, and recreation opportunities	 Availability of jobs for my skillset
	 Career opportunities for my children

Importance

- **Question Phrasing:** How important is it to you personally, that your community possesses the following characteristics? Use a 10-point scale where 10 represents the highest importance, and 1 represents the lowest.
- The **average** score is **8.50** among all categories

Experience

- **Question Phrasing:** In your personal experience, how has the City of Tampa delivered on these characteristics? Use a 10-point scale where 10 represents very well, and 1 represents not well at all.
- The **average** score is **6.97** among all categories

Expectation Gap

- Calculated as *(Importance – Experience)*
- A higher expectation gap is a bad thing
- The **average** expectation gap is **1.53**

Respondent Profile

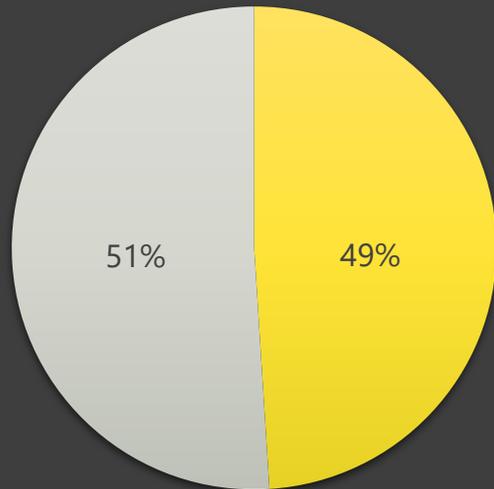
Race

Black/African American	22.70%
Hispanic/Latino	27.00%
White/Caucasian	43.00%
All Others	7.30%

Education

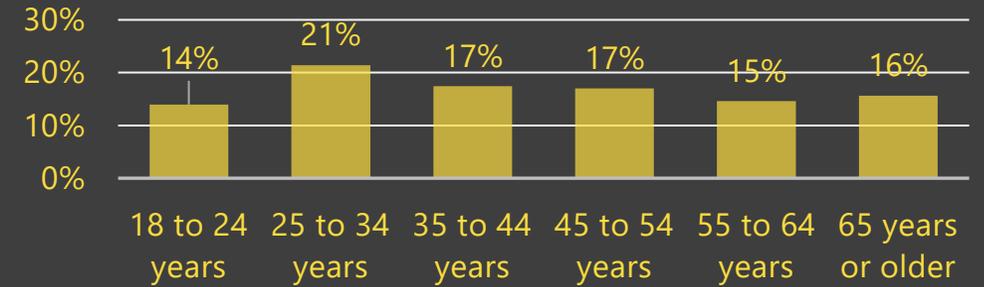
No college education	37.79%
Some college	19.20%
College degree	29.51%
Doctoral or professional degree	13.50%

Gender



■ Male ■ Female

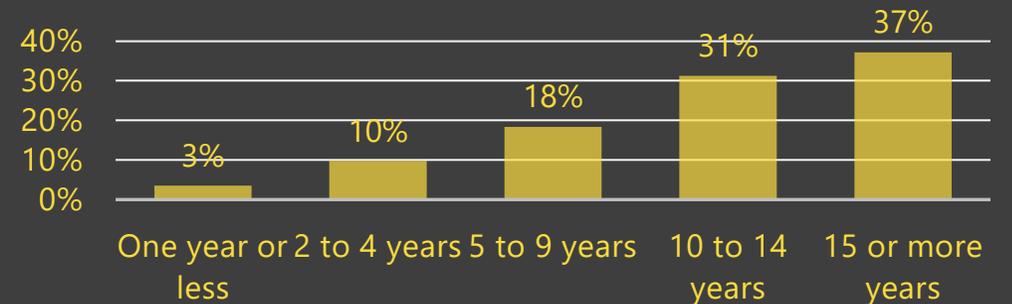
Age



Income



Tenure



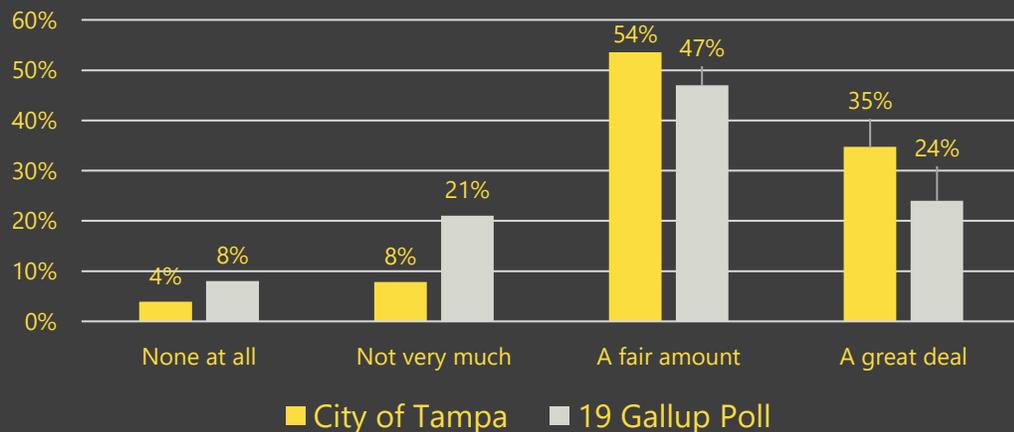
Top-Line Approval



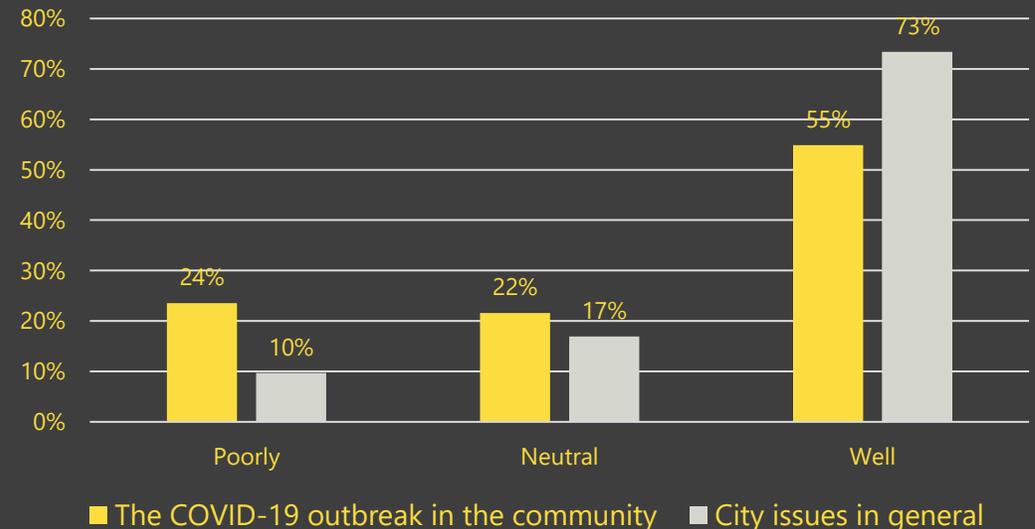
Trusting Local Government

- The city outperforms the nationwide average on trust and confidence
- The majority supports the City's handling of COVID-19, although a larger share of the population disapproves of that than the City's handling of other city issues

How much trust and confidence do you have in the local governments in the area where you live when it comes to handling local problems?



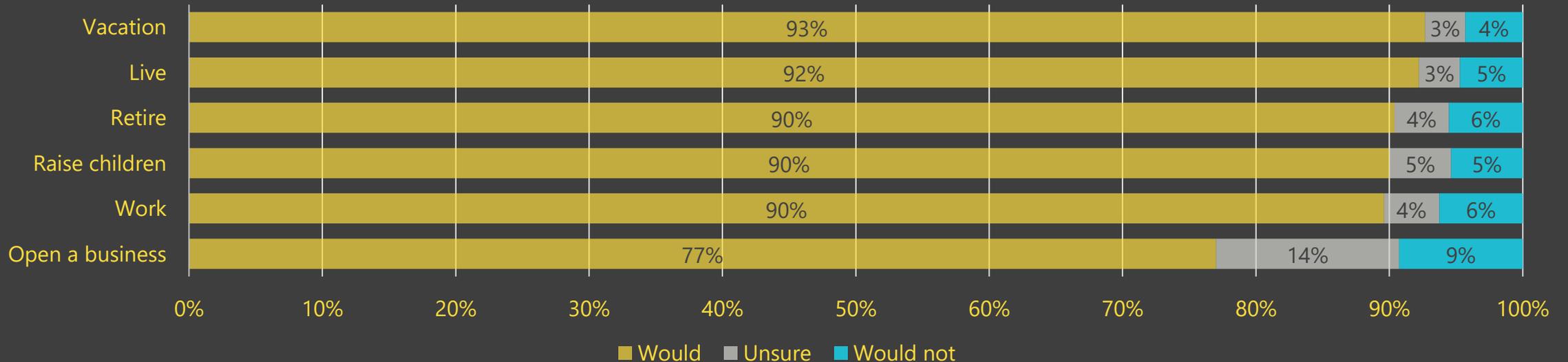
How do you feel that the City of Tampa has handled _?



Recommending Tampa

- Most residents would recommend the city for several categories
- There was substantially more uncertainty about opening a business. This is largely attributable to residents' lack of awareness as to how to start a business and is similar to other nearby areas.

Would you recommend the City of Tampa to a friend, family member, or acquaintance as a place to _?



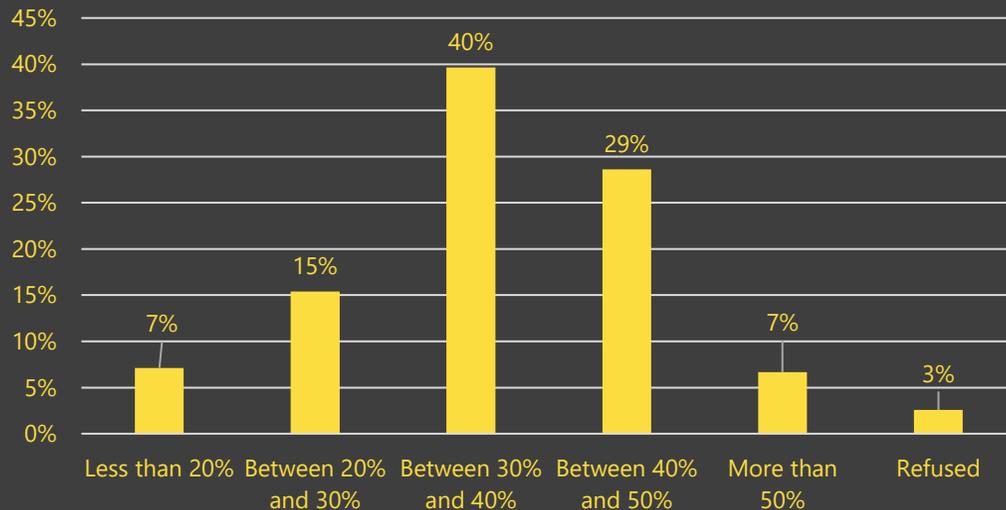
Affordable Housing



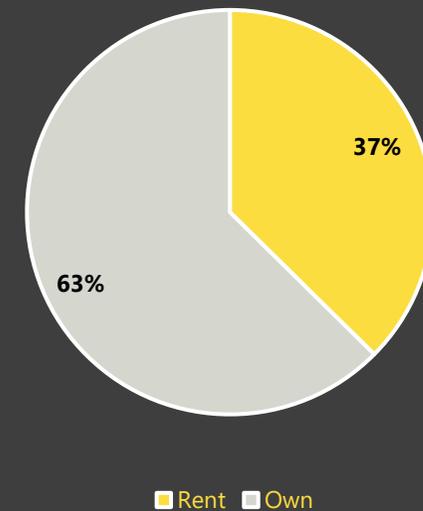
Housing Options

- City of Tampa Residents are facing increasing costs of housing
 - Disproportionately affecting families with children. 86% of families with children in the household are rent burdened.
- This trend is growing across central Florida, not limited to Tampa
- Experts recommend not spending more than 30% of income on housing expenses

How much of your monthly income do you spend on housing expenses such as rent, mortgage, and utilities?



Do you rent or own your current City of Tampa residence?

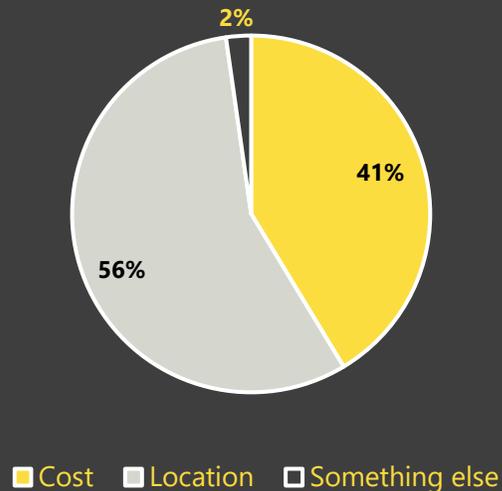


Housing Options (Cont'd)

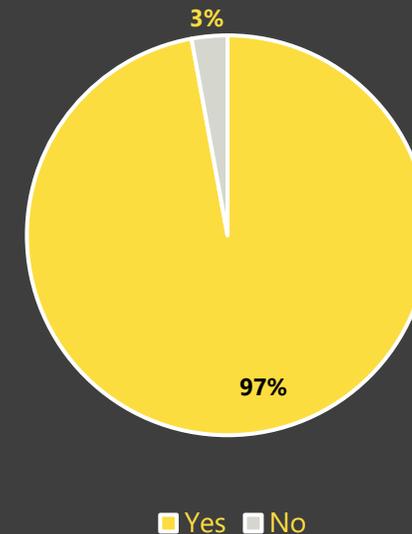
Housing Affordability			
	Importance	Experience	Gap
Affordable housing choices	8.10	6.37	1.73
Housing options near where I work	7.55	6.22	1.33

- Despite increasing costs, most believe that their home meets their family's needs
- Location remains more important than cost as a factor.
 - "Something Else" factors included school districts, safety factors, and proximity to family

When you chose your current home, what was the most important factor in your choice of where to live?



Does your current home meet your family's needs?



Transportation



Transportation Rankings

- Transportation remains a hot-button issue for residents
- Public Transit is significantly less of a priority in aggregate than improving road conditions and safety
- Pedestrian fatalities have featured prominently in local news, emphasizing this issue

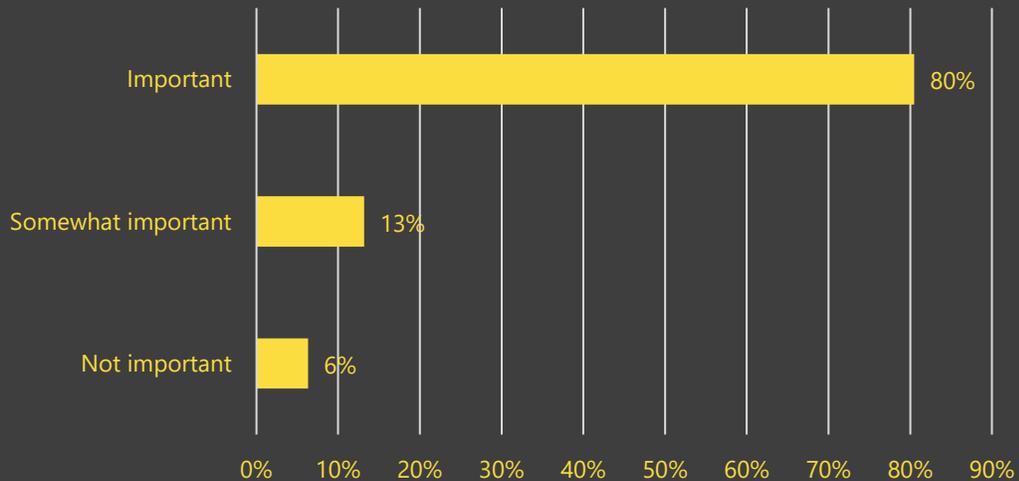
Transportation Themes			
	Importance	Experience	Gap
Smooth traffic flow on major roads	8.66	6.17	2.49
Bicyclist and pedestrian safety	8.90	6.44	2.46
Parking availability	8.58	6.16	2.42
Quality roads	8.78	6.50	2.28
Public transit options	7.62	6.31	1.32

*Highlighting indicates where importance and experience are higher than average while the gaps highlighted indicate a score that is performing better than average

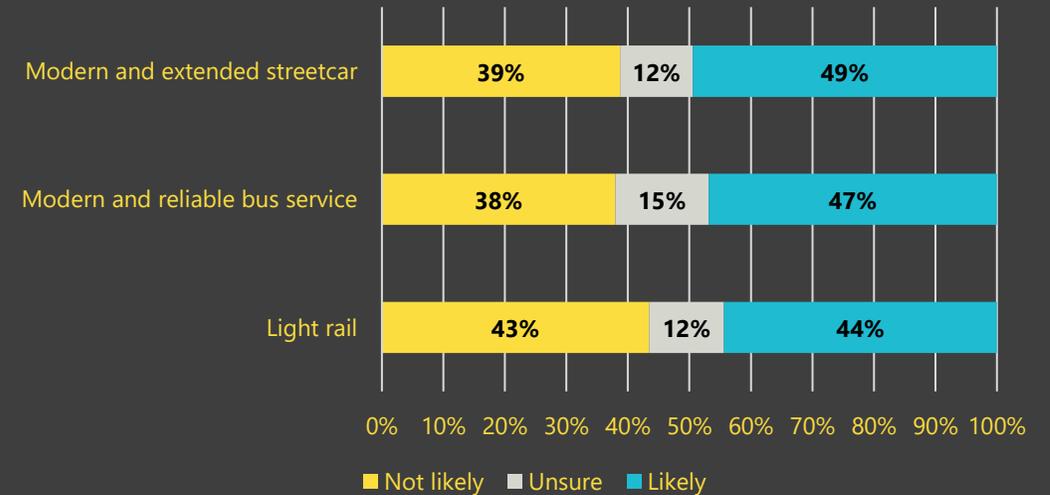
Mobility Options

- Residents overwhelmingly support car-free options
- Half indicate that they themselves are likely to utilize the three public transit options tested

The City of Tampa is working to expand mobility options that do not require a personal vehicle for all residents. How important do you think car-free options are?



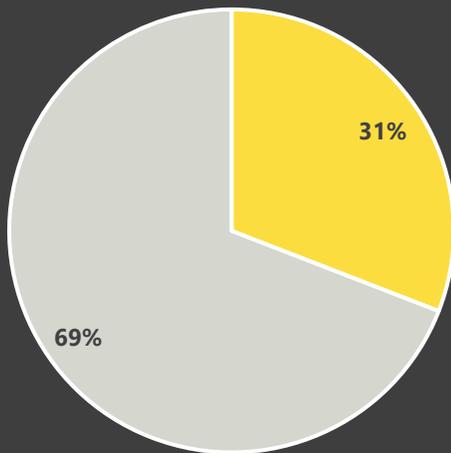
How likely are you to use each of the following new and expanded alternative mobility options?



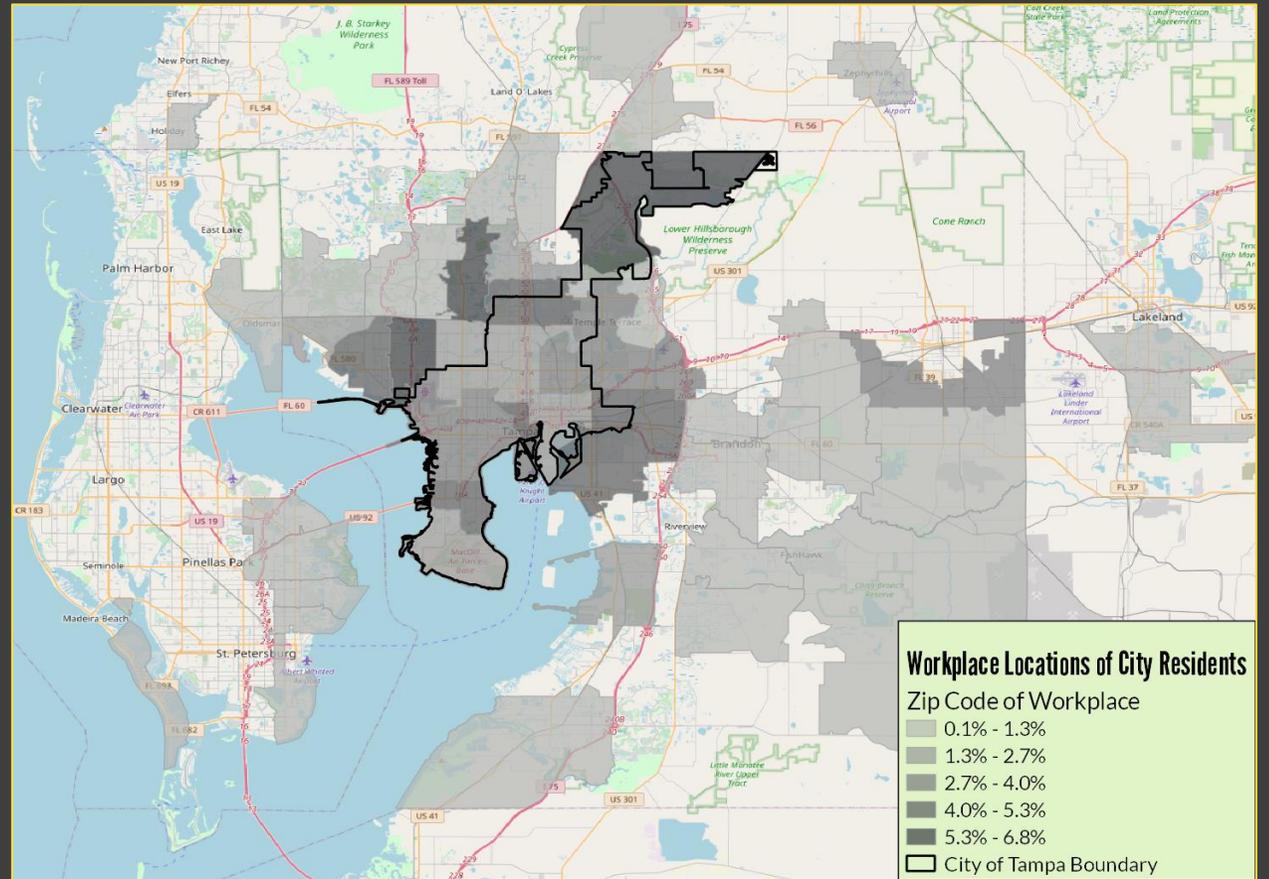
Workplace & Commutes

- One third of residents are working remotely
- Commute times vary across the city, with those living farther from the urban core experiencing longer commutes

Remote or on-location work



■ Work from home ■ Work on location



Location	Average of Drivetime
Downtown/Channelside/Harbor Island	25.9
South Tampa	27.1
East Tampa/Ybor/Heights	30.0
New Tampa	31.6
West Tampa South	32.1
University/Sulphur Springs	37.4

Sustainability & Resilience



Sustainability & Resilience

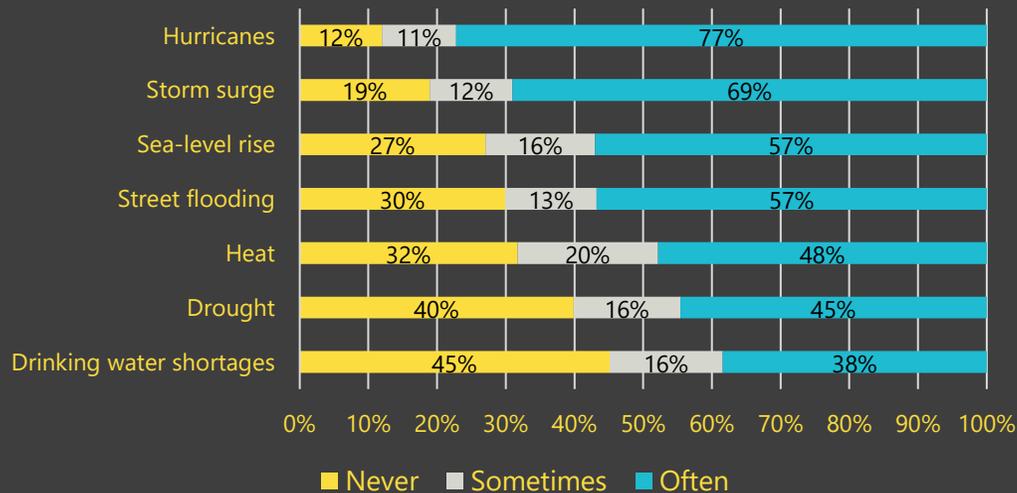
- Residents place a high priority on flood prevention, but they also rank the City of Tampa highly on the matter
- When thinking long-term, residents have rising concerns about heat, drought, and water shortages – but their concerns about hurricanes and flooding remain the same

Sustainability and Resiliency

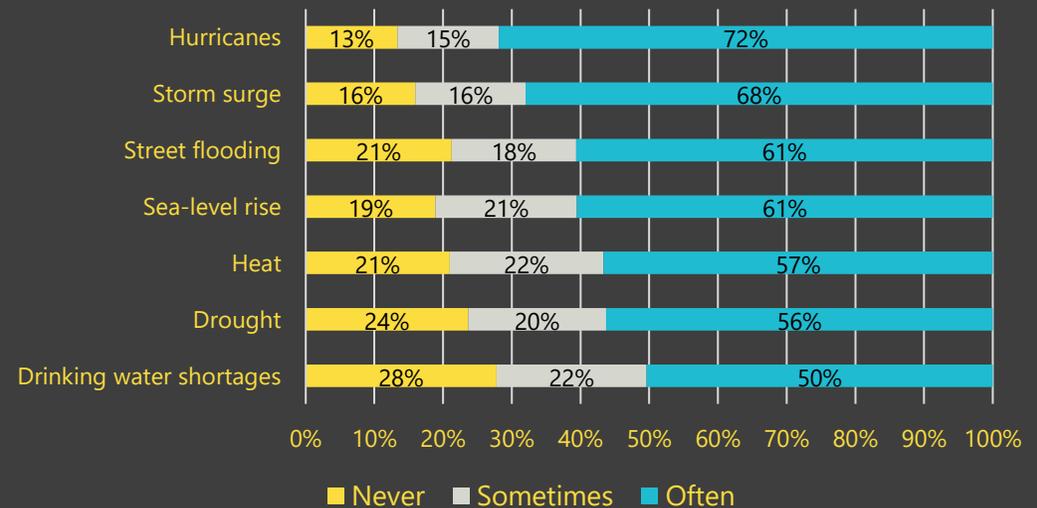
	Importance	Experience	Gap
Flood prevention	8.96	7.38	1.58

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How often do you worry about being negatively impacted now by _?



How often do you worry about being negatively impacted in 10 years from now by _?



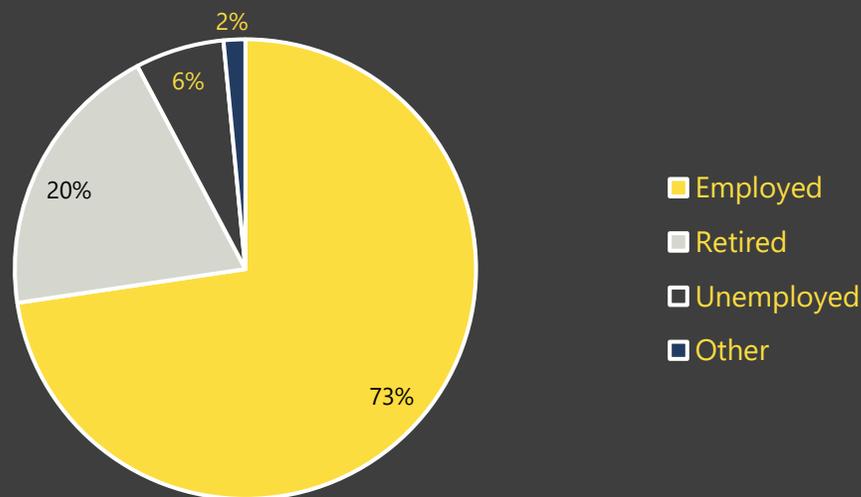
Workforce Development



Workforce Development

- Unemployment remains higher than average, at 6%
 - Among white residents, only 4.49% are unemployed. Black and Hispanic residents experience greater unemployment, at 6.77% and 6.29%, respectively.
- Most unemployed residents lost their job during the COVID-19 lockdown.

How would you define your employment status?

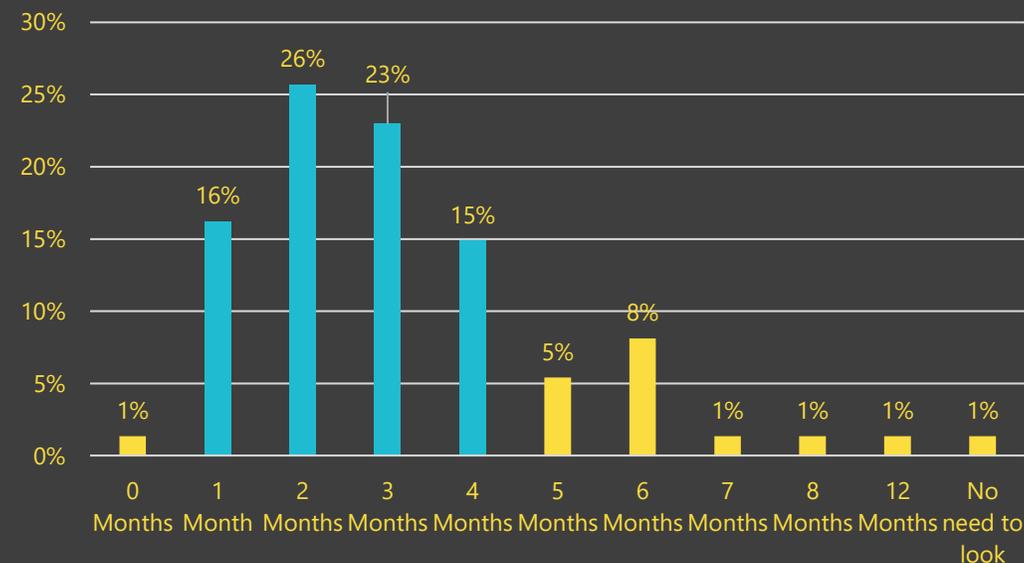


Workforce Development

	Importance	Experience	Gap
Career opportunities for my children	7.95	6.47	1.48
Availability of jobs for my skillset	8.03	6.63	1.40

*Highlighting indicates where importance and experience are higher than average while the gaps highlighted indicate a score that is performing better than average

For approximately how many months have you been looking for a job? (n=74)



Conclusion and Recommendations



Other characteristics

- Most other characteristics score favorably, especially those related to greenspaces, community cleanliness, and education.
- Personal safety was identified as an above-average expectation gap.

Other Characteristics			
	Importance	Experience	Gap
Sense of personal safety	9.16	7.2	1.96
Diversity, equity and inclusion	8.68	7.05	1.63
Cleanliness of public spaces	9.15	7.76	1.39
Sense of community	8.69	7.39	1.30
Accessible and timely waste management	8.99	7.87	1.11
K-12 education	8.28	7.31	0.97
Greenspaces, parks, and public spaces	8.97	8.18	0.79
Cultural events, social activities, and recreation opportunities	8.78	8.08	0.70
After-school programs	7.67	7.01	0.66

*Highlighting indicates where importance and experience are higher than average while the gaps highlighted indicate a score that is performing better than average

Lowest Expectations

- Low expectation gaps indicate that the city is meeting its citizens expectations on these characteristics.
- The city has met its expectations with respect to culture, greenspaces, education, and after-school programs.
 - New Tampa also found its expectations on waste management to be met

Smallest 3 Expectation Gaps by Region

	South Tampa (n=215)	Downtown (n=216)	East Tampa (n=215)	University (n=217)	West Tampa (n=218)	New Tampa (n=220)
Smallest	Cultural events, social activities, and recreation opportunities (0.67)	After-school programs (0.81)	After-school programs (0.68)	Cultural events, social activities, and recreation opportunities (0.70)	After-school programs (0.68)	Greenspaces, parks, and public spaces (0.51)
Second Smallest	After-school programs (0.70)	Cultural events, social activities, and recreation opportunities (0.86)	Greenspaces, parks, and public spaces (0.76)	After-school programs (0.76)	Cultural events, social activities, and recreation opportunities (0.77)	Accessible and timely waste management (0.70)
Third Smallest	Greenspaces, parks, and public spaces (0.80)	Greenspaces, parks, and public spaces (0.87)	Cultural events, social activities, and recreation opportunities (0.78)	K-12 education (0.81)	Greenspaces, parks, and public spaces (0.89)	Cultural events, social activities, and recreation opportunities (0.77)

Greatest Expectations

- City of Tampa Residents rank transportation-related issues as the highest priority, regardless of the region.
 - Regional prioritizations reflect greater use of walking and biking in the urban core, vis-à-vis commuting needs for residents in New Tampa and the University Area

Greatest 3 Expectation Gaps by Region

	South Tampa (n=215)	Downtown (n=216)	East Tampa (n=215)	University (n=217)	West Tampa (n=218)	New Tampa (n=220)
Greatest	Bicyclist and pedestrian safety (2.56)	Bicyclist and pedestrian safety (2.68)	Bicyclist and pedestrian safety (2.27)	Quality roads (2.64)	Smooth traffic flow on major roads (2.95)	Parking availability (2.50)
Second Greatest	Smooth traffic flow on major roads (2.43)	Smooth traffic flow on major roads (2.63)	Smooth traffic flow on major roads (2.23)	Parking availability (2.60)	Quality roads (2.67)	Smooth traffic flow on major roads (2.40)
Third Greatest	Parking availability (2.26)	Parking availability (2.48)	Tie: Quality roads (2.00) Parking availability (2.00)	Smooth traffic flow on major roads (2.54)	Bicyclist and pedestrian safety (2.64)	Quality roads (2.15)

Conclusion

The City of Tampa should be encouraged by the results of this comprehensive survey

- Nearly nine in ten residents have trust and confidence in their local government
- Seven in ten residents believe that the City has handled city issues well
- Nine in ten residents would recommend the City as a place to live, to vacation, to retire, to raise children, and to work
- With responsible growth policies, the City is in a position to keep growing and establish itself as a jewel of the southeast

Recommendations

- The City of Tampa should take a **mobility-first** approach to addressing the concerns of the city
 - Reducing commute times opens additional job and housing opportunities that are within a reasonable commute time.
 - Long-term housing price trends will cause an increase in commuter populations
 - Although large majorities support car-free transit options, residents are more enthusiastic about bicycling and pedestrian traffic than taking public transit in its many forms.
 - This research suggests that Vision Zero policies should be continued and expanded.
 - The development of more bicycle and pedestrian passageways that do not share the road with automobiles is very likely to be received positively
 - The city should not expect immediate, widespread adoption of increased public transportation options by the public. Marketing and messaging will be needed to change perceptions about their safety and efficacy.
- In the long-term, City Residents' concerns about water availability are similar to their concerns about hurricanes and flooding. This reflects that the public is aware of the need to secure drinking water for the city.

Thank You!

This presentation was compiled for the
City of Tampa by HCP Associates

