WELCOME

2021 Community Values Survey

Created for the City of Tampa by HCP Associates

City of Tampa Florida

Introduction

- Second iteration of study for the City of Tampa's strategic priorities for the community
- Can trend metrics from baseline study conducted in 2020
- 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: 1,300 City of Tampa residents aged 18+

- Margin of error: ±2.71% at a 95% confidence level

- Data collection: July 9, 2021 through August 21, 2021

- Telephonic survey using both landlines and cellphones

- Average length of survey: 14 minutes

- Five respondent demographics were controlled:
age, gender, race/ethnicity, educational attainment, and homeownership status

2021 Survey Respondents
- Tampa City Boundary
- Telephonic Response Location
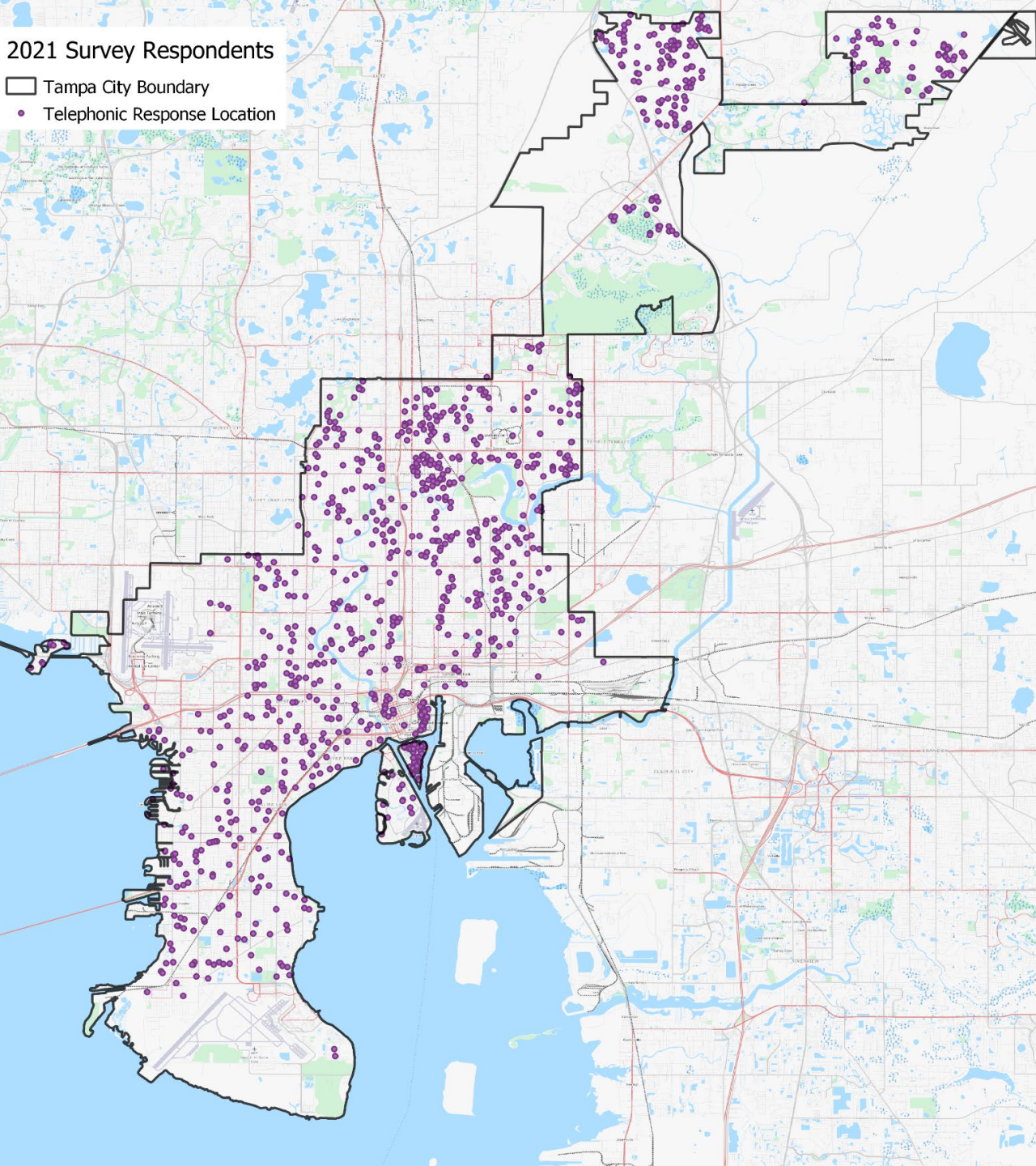
Study respondents

- Respondents come from a broad cross-section of the City of Tampa

- Responses correlate well with the population density of the city
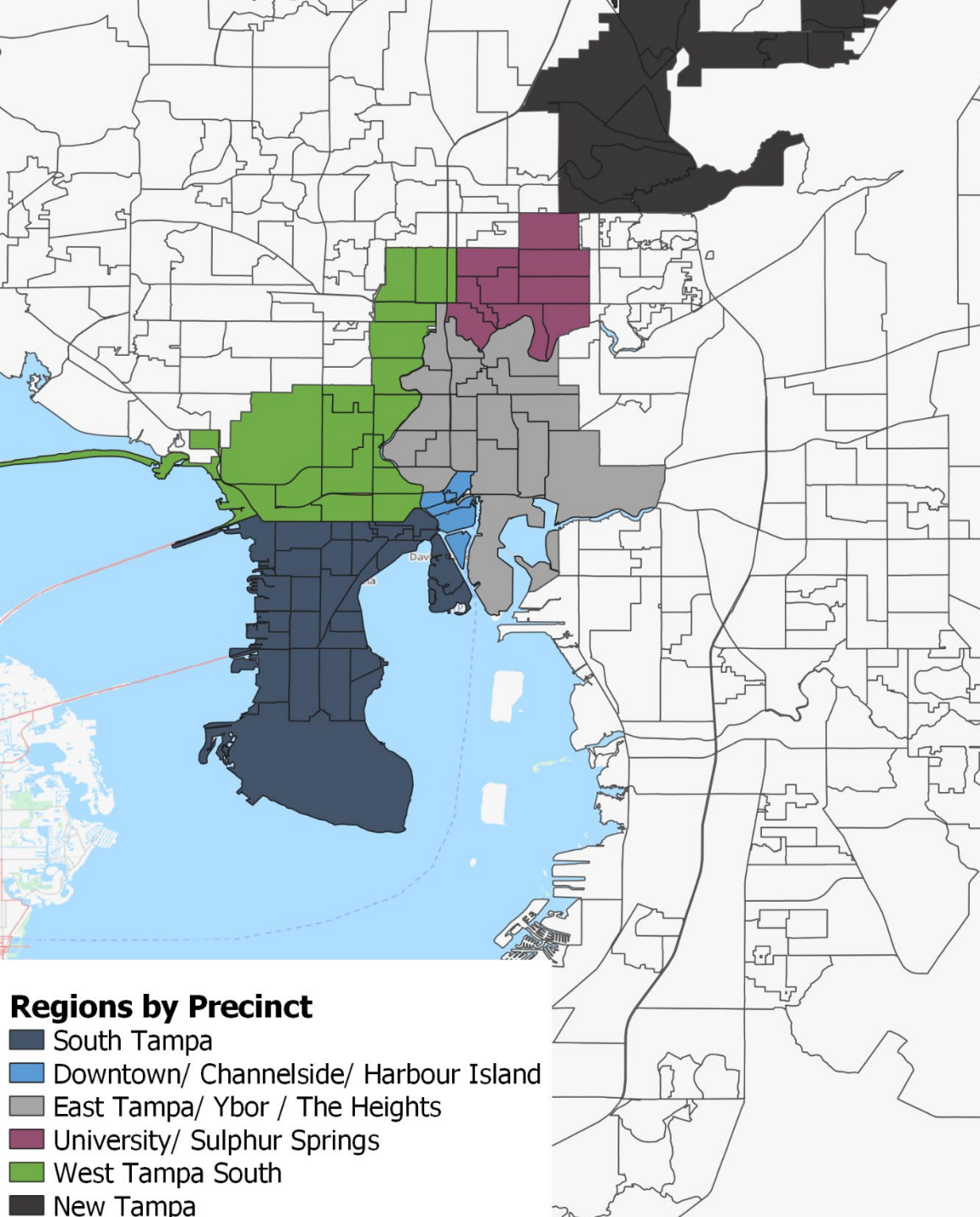
Study Regions

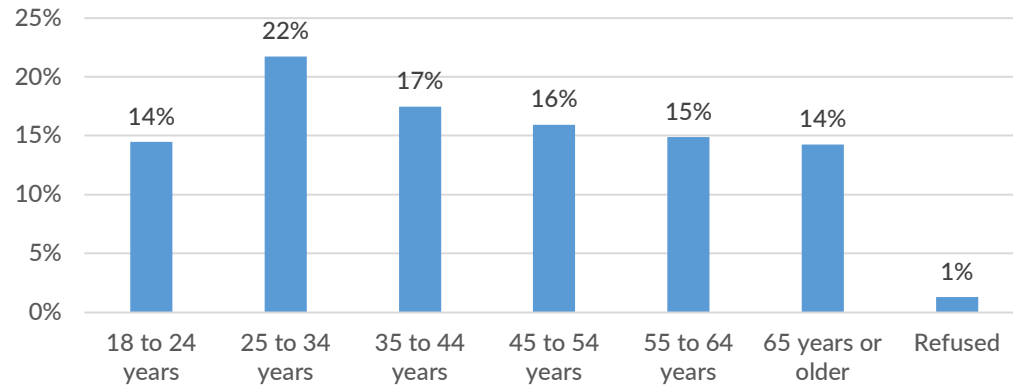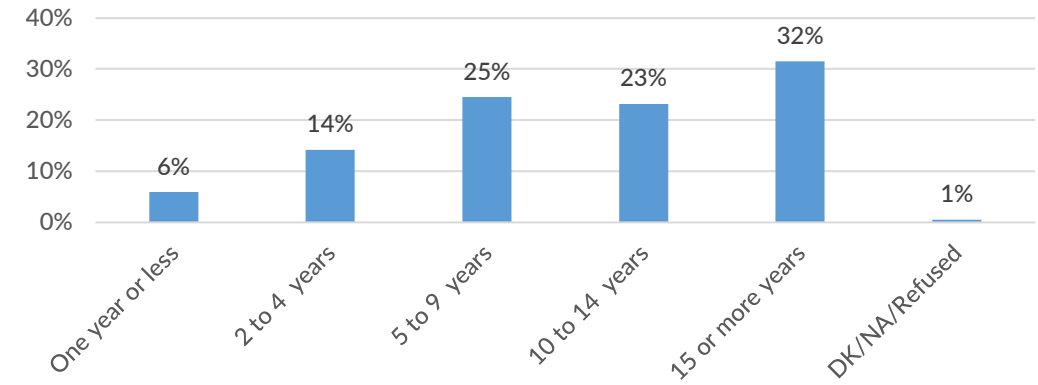- Data was segmented into six regions to provide analysis of different parts of the city
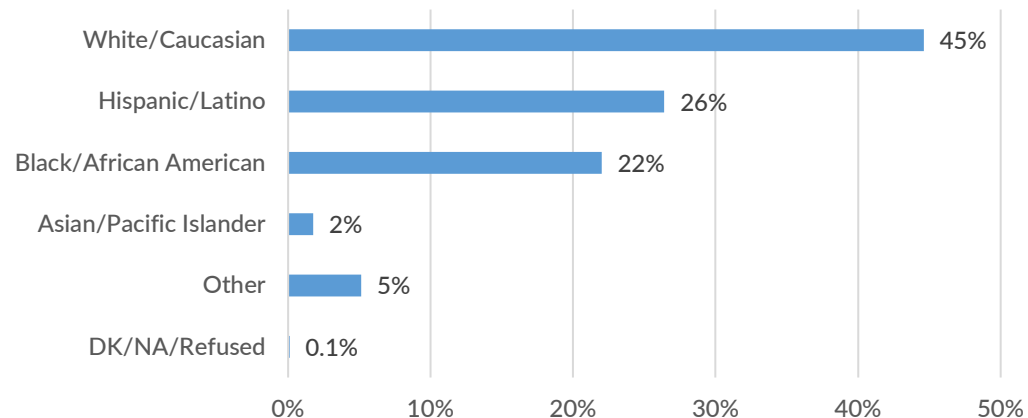
Regions by Precinct
- South Tampa
- Downtown/ Channelside/ Harbour Island
- East Tampa/ Ybor / The Heights
- University/ Sulphur Springs
- West Tampa South
- New Tampa

Respondent Profile

In which of the categories does your current age fall?

Category	Percentage
18 to 24 years	14%
25 to 34 years	22%
35 to 44 years	17%
45 to 54 years	16%
55 to 64 years	15%
65 years or older	14%
Refused	1%

How long have you been a City of Tampa resident?

Category	Percentage
One year or less	6%
2 to 4 years	14%
5 to 9 years	25%
10 to 14 years	23%
15 or more years	32%
DK/NA/Refused	1%

Which option most closely describes your race?

Category	Percentage
White/Caucasian	45%
Hispanic/Latino	26%
Black/African American	22%
Asian/Pacific Islander	2%
Other	5%
DK/NA/Refused	0.1%

How would you describe your gender?

Category	Percentage
Male	49%
Female	51%
Other	0.1%
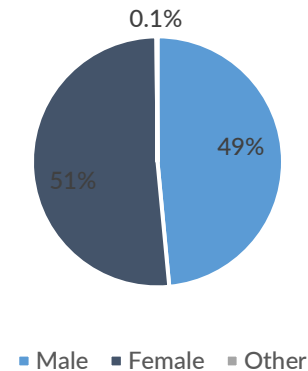
Do you have children under the age of 18 living in your household full-time?

Category	Percentage
Yes	42%
No	57%
DK/NA/Refused	1%
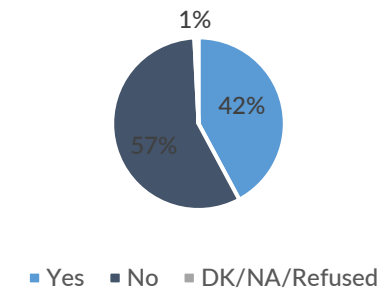
Respondent Profile

What is your highest level of completed education?

- Did not complete high school: 5%
- High school or GED: 32%
- Trade ot vocational school: 8%
- Some college: 17%
- College degree: 25%
- Doctoral degree: 10%
- DK/NA/Refused: 3%
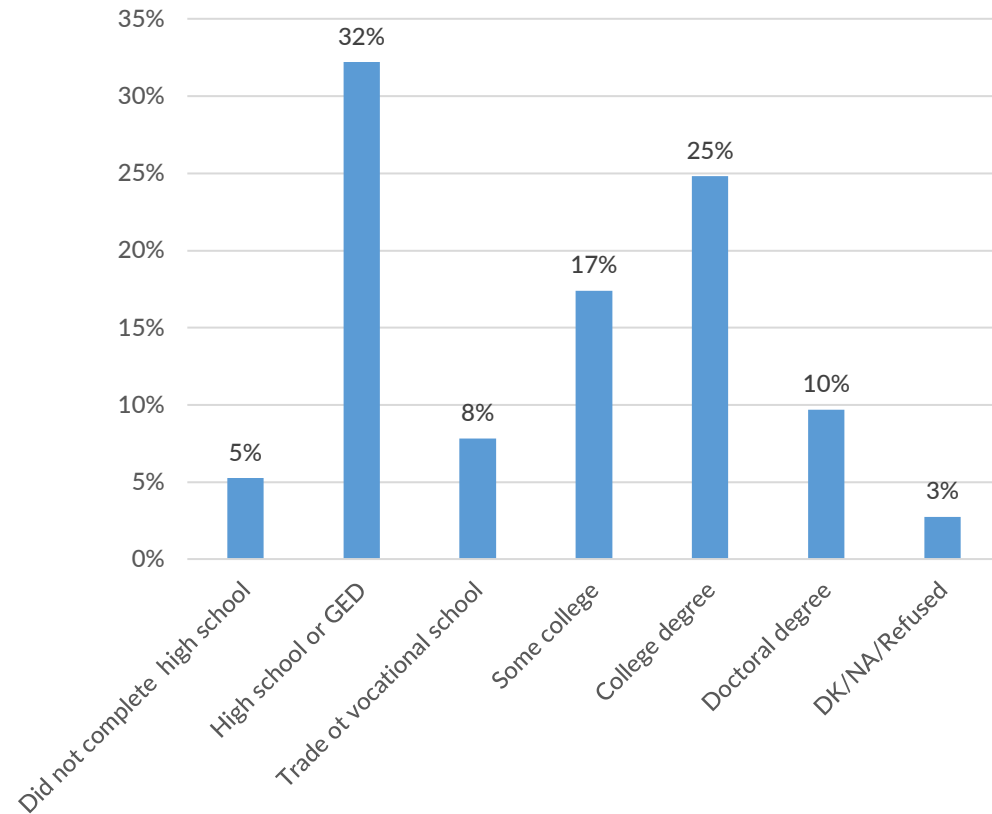
Into what range does your annual household income fall?

- Less than $25,000: 8%
- $25,000 to $49,999: 26%
- $50,000 to $74,999: 18%
- $75,000 to $99,999: 12%
- 100,000 to $149,999: 12%
- More than $150,000: 8%
- DK/NA/Refused: 16%
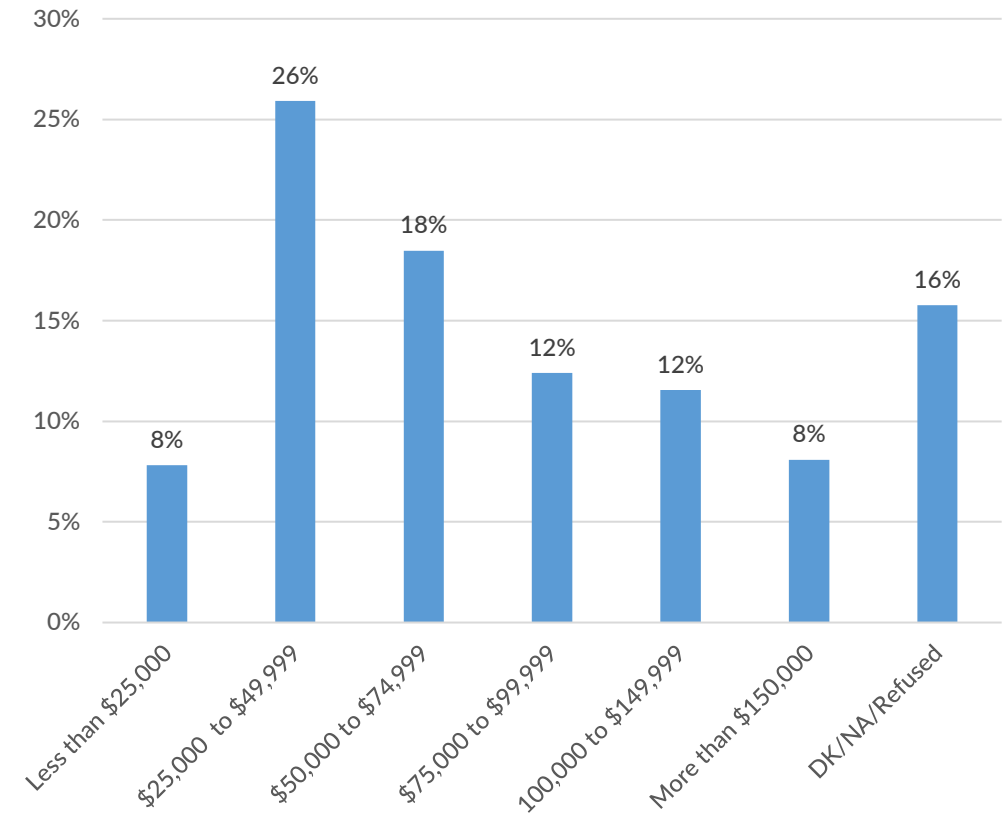
Top-line Approval

Trusting Local Government

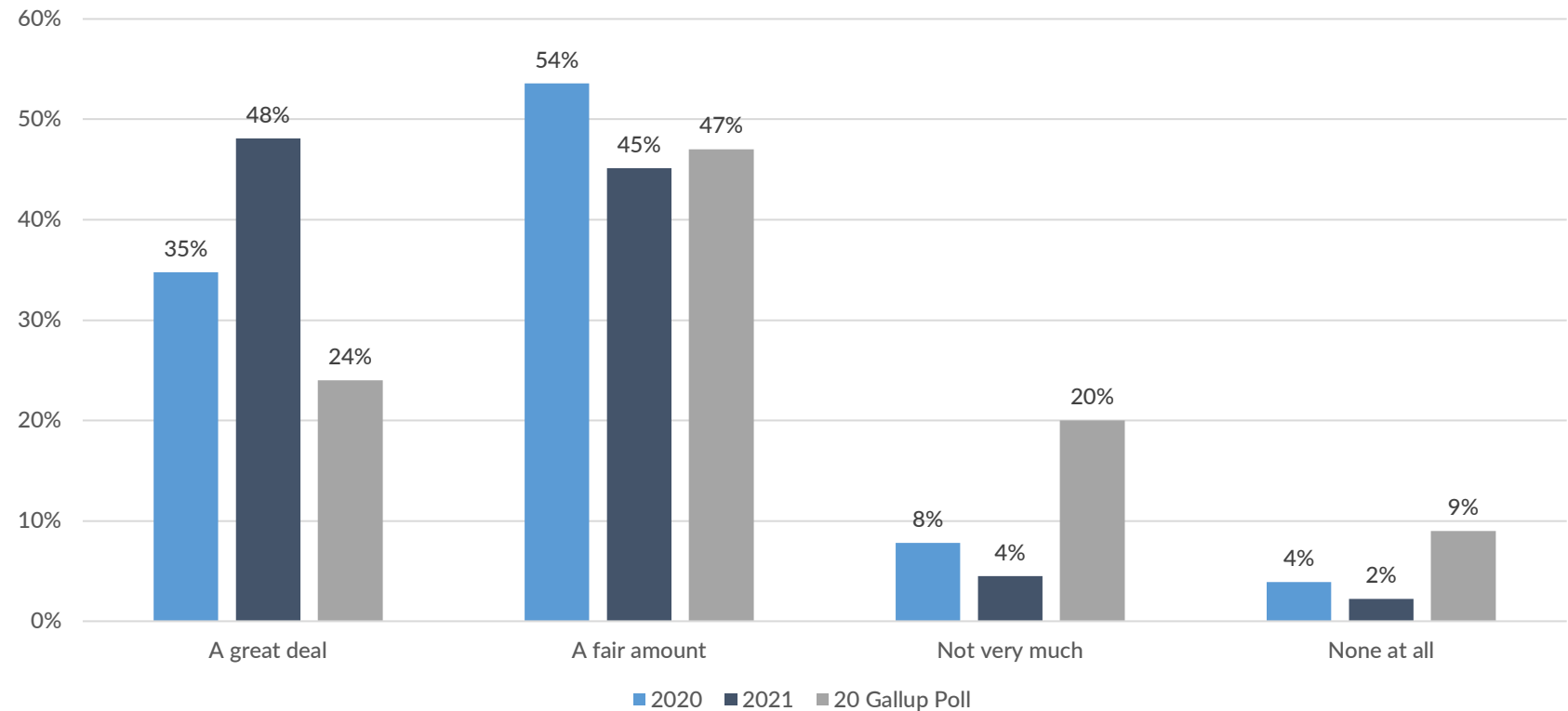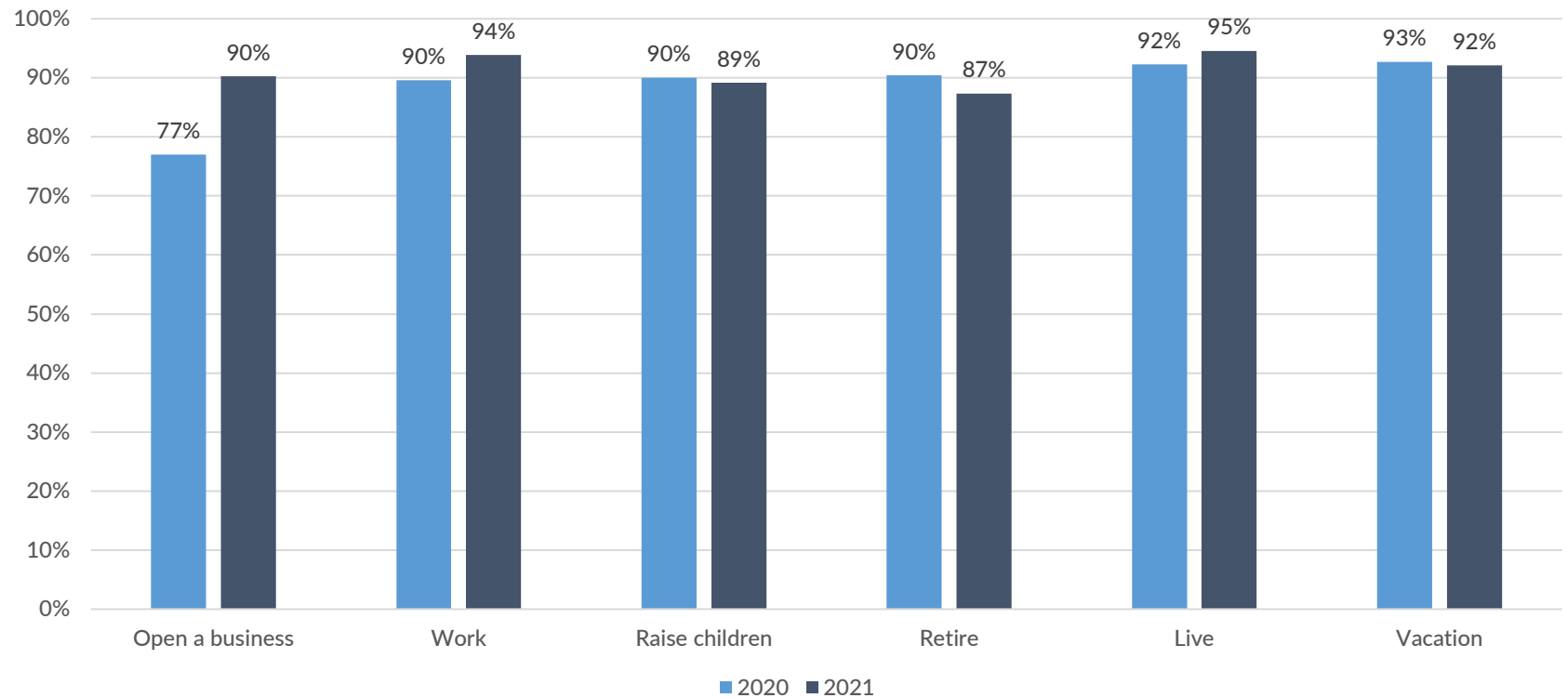How much trust and confidence do you have in the City of Tampa's government when it comes to handling issues in the City?

	A great deal	A fair amount	Not very much	None at all
2020	35%	54%	8%	4%
2021	48%	45%	4%	2%
20 Gallup Poll	24%	47%	20%	9%

# Recommending Tampa

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

|	Open a business	Work	Raise children	Retire	Live	Vacation
2020	77%	90%	90%	90%	92%	93%
2021	90%	94%	89%	87%	95%	92%

Handling Community Items

On a scale from one to five, where one is "very poorly" and five is "very well," how do you feel that the City of Tampa has handled the COVID-19 outbreak in the community?

Legend: 2020, 2021

	1- Very poorly	2	3	4	5- Very well
2020	4%	20%	22%	47%	7%
2021	8%	7%	25%	38%	22%
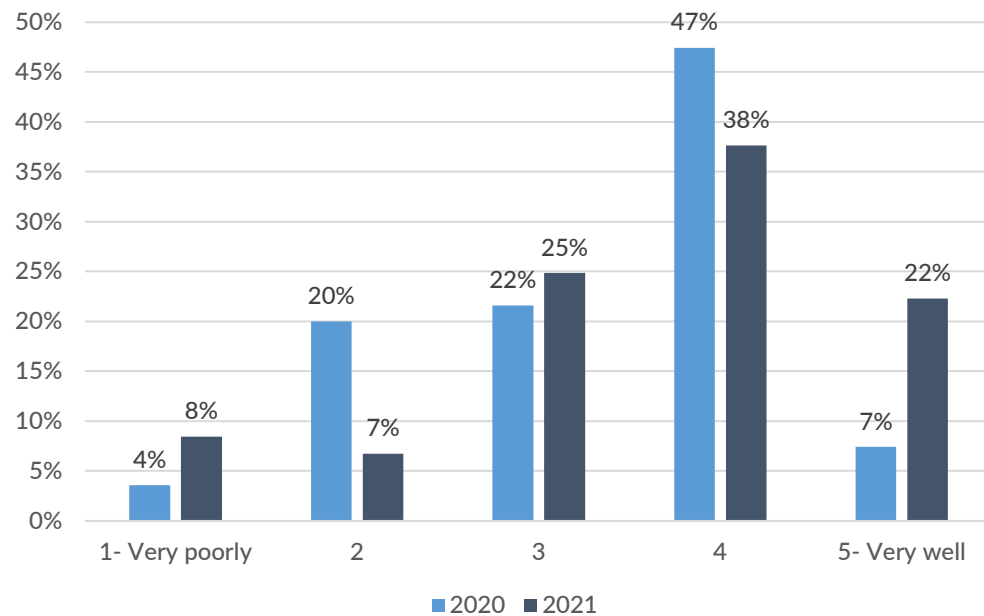
2021 Mean: 3.59
(2020 Mean: 3.33)

On a scale from one to five, where one is "very poorly" and five is "very well," how do you feel that the City of Tampa has handled city issues in general?

Legend: 2020, 2021

	1- Very poorly	2	3	4	5- Very well
2020	2%	8%	17%	59%	14%
2021	2%	3%	26%	45%	23%
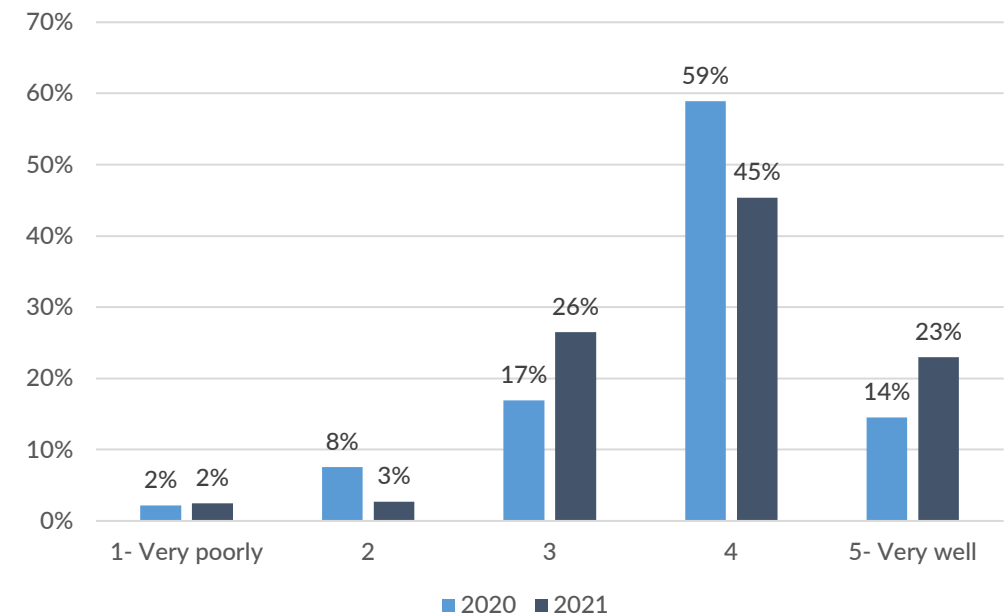
2021 Mean: 3.84
(2020 Mean: 3.75)

Community Characteristics

Affordable housing choices

Housing options near where I work

K-12 education

After-school and childcare programs*

Sense of personal safety

Diversity, equity and inclusion

Sense of community

Cleanliness of public spaces

Events, social activities, and recreation opportunities*

Arts and culture institutions*

Greenspaces, parks, and public spaces

Accessible and timely waste management

Flood prevention

Bicyclist and pedestrian safety

Quality roads

Public transit options

Smooth traffic flow on major roads

Parking availability

Availability of jobs for my skillset

Career opportunities for the next generation

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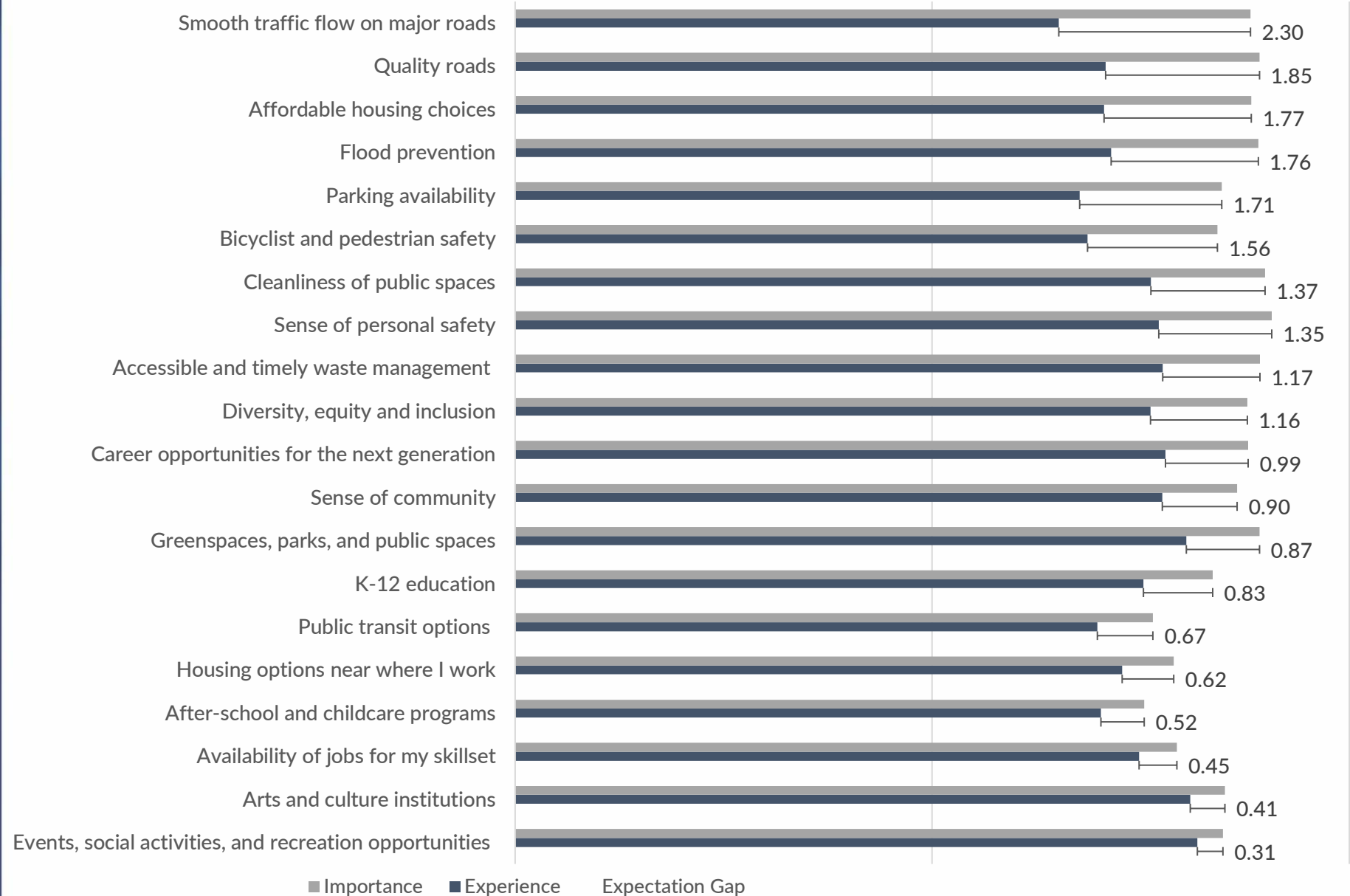
- Question Phrasing: In your personal experience, how has the City of Tampa delivered on these characteristics? Use a 10-point scale where 10 represents very well, and 1 represents not well at all.
- The average score is 6.97 among all categories

Expectation Gap

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

Expectation Gaps Ranked

Category	Value
Smooth traffic flow on major roads	2.30
Quality roads	1.85
Affordable housing choices	1.77
Flood prevention	1.76
Parking availability	1.71
Bicyclist and pedestrian safety	1.56
Cleanliness of public spaces	1.37
Sense of personal safety	1.35
Accessible and timely waste management	1.17
Diversity, equity and inclusion	1.16
Career opportunities for the next generation	0.99
Sense of community	0.90
Greenspaces, parks, and public spaces	0.87
K-12 education	0.83
Public transit options	0.67
Housing options near where I work	0.62
After-school and childcare programs	0.52
Availability of jobs for my skillset	0.45
Arts and culture institutions	0.41
Events, social activities, and recreation opportunities	0.31

■ Importance ■ Experience Expectation Gap

Expectations' Change from 2020

Category	Ranking 2020	Ranking 2021	Ranking Change
Smooth traffic flow on major roads	1	1	0
Quality roads	8	2	+6
Affordable housing choices	12	3	+9
Flood prevention	4	4	0
Parking availability	3	5	-2
Bicyclist and pedestrian safety	2	6	-4
Cleanliness of public spaces	5	7	-2
Sense of personal safety	14	8	+6
Accessible and timely waste management	9	9	0
Diversity, equity and inclusion	17	10	+7
Career opportunities for the next generation	6	11	-5
Sense of community	15	12	+3
Greenspaces, parks, and public spaces	16	13	+3
K-12 education	13	14	-1
Public transit options	7	15	-8
After-school and childcare programs	18	16	+2
Availability of jobs for my skillset	10	17	-7
Arts and culture institutions	11	18	-7
Events, social activities, and recreation opportunities	19	19	0

Expectations by Region

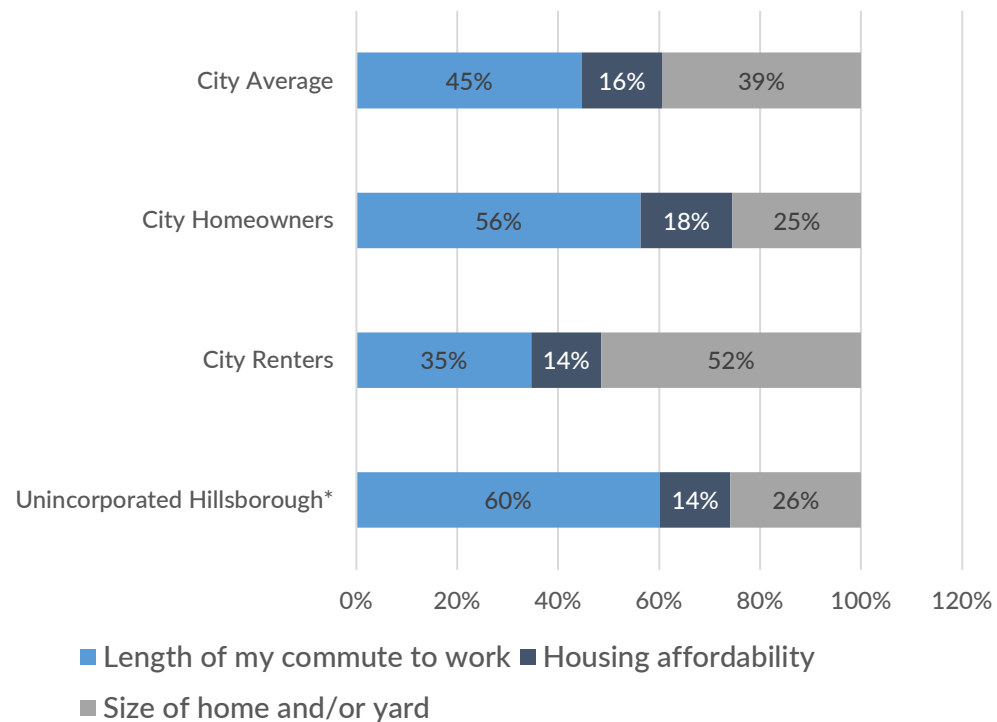|	Smallest	Second Smallest	Third Smallest
South Tampa	Availability of jobs for my skillset	Arts and culture institutions	Events, social activities, and recreation opportunities
Downtown	Availability of jobs for my skillset	Events, social activities, and recreation opportunities	Arts and culture institutions
East Tampa	Availability of jobs for my skillset	After-school and childcare programs	Events, social activities, and recreation opportunities
University	Availability of jobs for my skillset	Arts and culture institutions	Events, social activities, and recreation opportunities
West Tampa	Availability of jobs for my skillset	Events, social activities, and recreation opportunities	Arts and culture institutions
New Tampa	Availability of jobs for my skillset	Events, social activities, and recreation opportunities	Arts and culture institutions

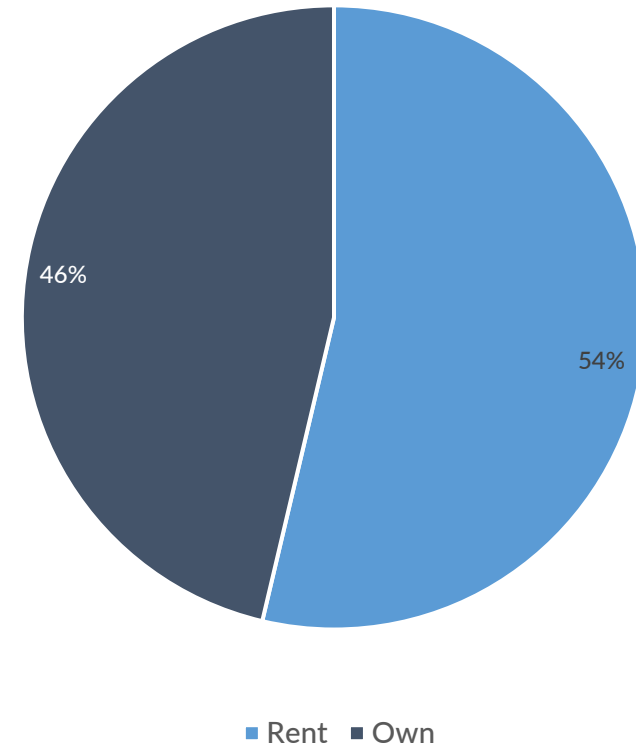|	Largest	Second Largest	Third Largest
South Tampa	Smooth traffic flow on major roads	Affordable housing choices	Flood prevention
Downtown	Smooth traffic flow on major roads	Quality roads	Affordable housing choices
East Tampa	Smooth traffic flow on major roads	Quality roads	Flood prevention
University	Smooth traffic flow on major roads	Quality roads	Flood prevention
West Tampa	Smooth traffic flow on major roads	Quality roads	Parking availability
New Tampa	Smooth traffic flow on major roads	Parking availability	Quality roads

Affordable Housing

Housing Factors

Which of the following is least important to you when considering your choice of where to live?
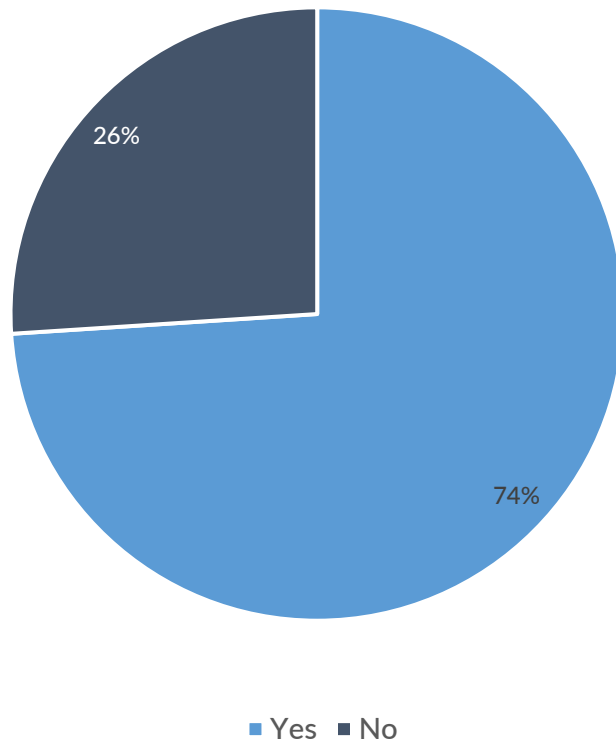
Category	Length of my commute to work	Housing affordability	Size of home and/or yard
City Average	45%	16%	39%
City Homeowners	56%	18%	25%
City Renters	35%	14%	52%
Unincorporated Hillsborough*	60%	14%	26%

■ Length of my commute to work ■ Housing affordability
■ Size of home and/or yard

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

54% Rent
46% Own

■ Rent ■ Own

*From Hillsborough County Sustainable Growth Study, 2019*

Housing Expenses

To those that rent: Would you like to own your own home?

26%

74%

- Yes
- No

To those that rent: When considering buying a home of your own, do you feel that you could find a home within the City of Tampa that meets your household's needs and is within your budget, or do you think you would need to go outside of the City of Tampa

19%

21%

60%

- Stay within the city
- Leave the city
- Don't know/Not sure
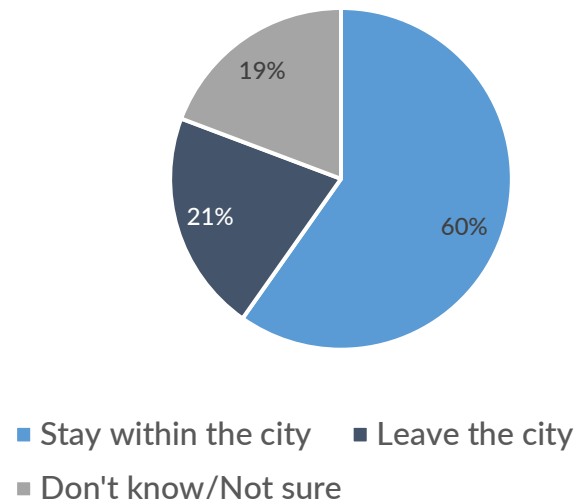
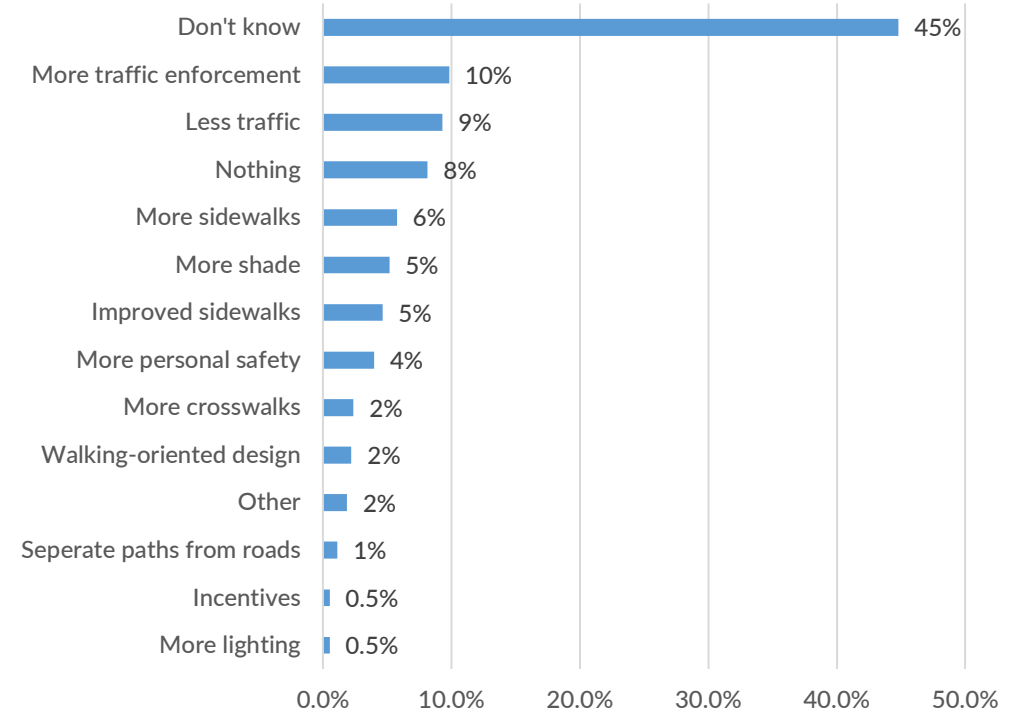| Geography	Average Monthly Housing Expenses (Self-reported)
South Tampa	$2,249.91
Downtown / Channelside / Harbor Island	$1,886.11
East Tampa / Ybor / Heights	$1,728.43
University / Sulphur Springs	$1,710.02
West Tampa	$2,000.50
New Tampa	$1,958.03

Transportation

Walkability

Let's talk about walkability. Do you regularly walk to run errands, visit businesses, or commute to work?
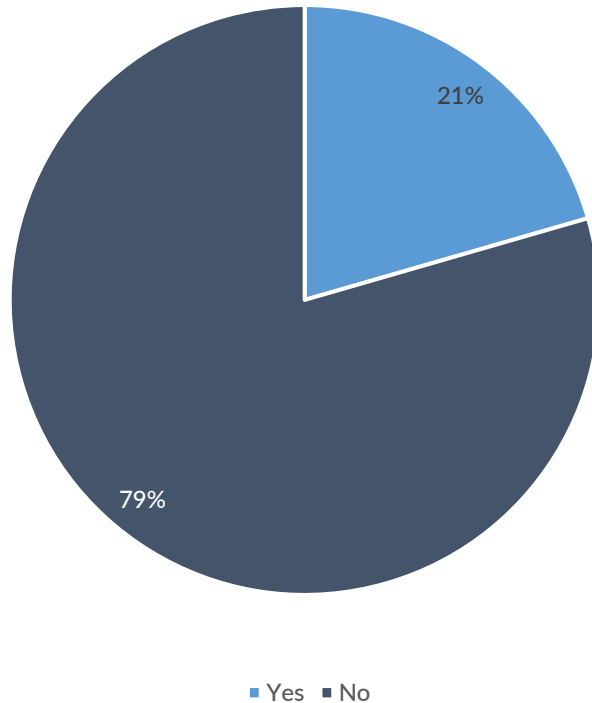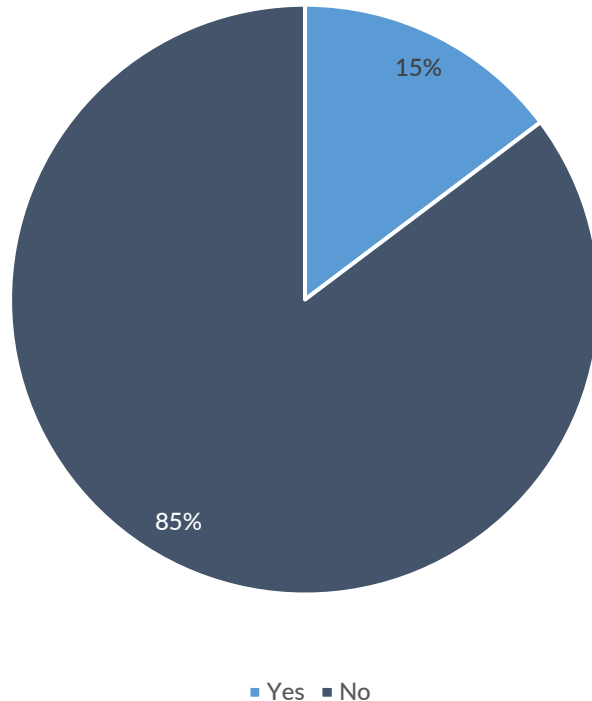
21%

79%

■ Yes ■ No

In your view, what improvements could be made in the city that would encourage people in your local area to walk to work or run errands more often?

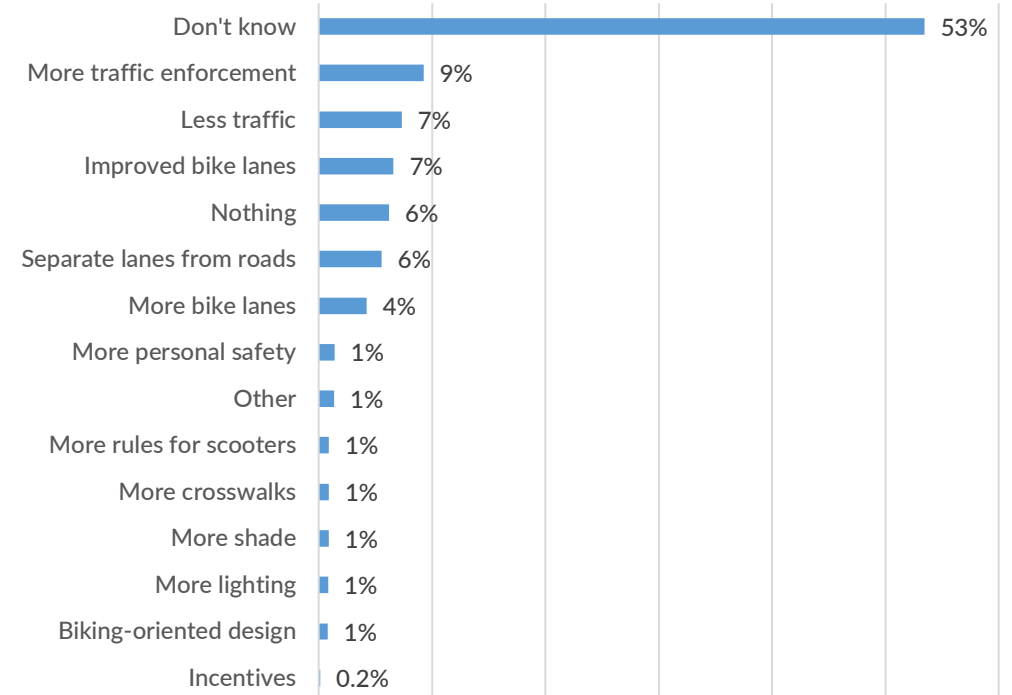|	
Don't know	45%
More traffic enforcement	10%
Less traffic	9%
Nothing	8%
More sidewalks	6%
More shade	5%
Improved sidewalks	5%
More personal safety	4%
More crosswalks	2%
Walking-oriented design	2%
Other	2%
Seperate paths from roads	1%
Incentives	0.5%
More lighting	0.5%

0.0%   10.0%   20.0%   30.0%   40.0%   50.0%

Two Wheels

What about things like bikes and scooters? Do you regularly bike or scoot to run errands, visit businesses, or commute to work?
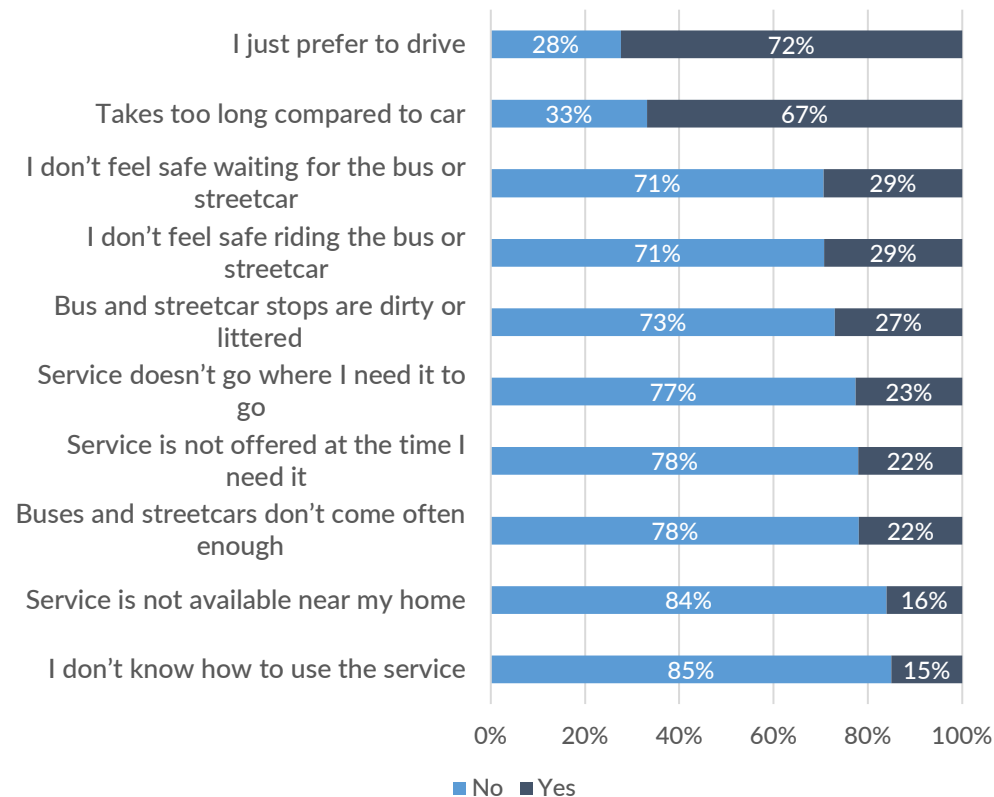

15%

85%

■ Yes ■ No

In your view, what improvements could be made in the city that would encourage people in your local area to bike or scoot to work or run errands more often?

Don't know	53%
More traffic enforcement	9%
Less traffic	7%
Improved bike lanes	7%
Nothing	6%
Separate lanes from roads	6%
More bike lanes	4%
More personal safety	1%
Other	1%
More rules for scooters	1%
More crosswalks	1%
More shade	1%
More lighting	1%
Biking-oriented design	1%
Incentives	0.2%

Transit Factors

Which of the following are reasons that you do not use public transit more often?

Factor	No	Yes
I just prefer to drive	28%	72%
Takes too long compared to car	33%	67%
I don't feel safe waiting for the bus or streetcar	71%	29%
I don't feel safe riding the bus or streetcar	71%	29%
Bus and streetcar stops are dirty or littered	73%	27%
Service doesn't go where I need it to go	77%	23%
Service is not offered at the time I need it	78%	22%
Buses and streetcars don't come often enough	78%	22%
Service is not available near my home	84%	16%
I don't know how to use the service	85%	15%

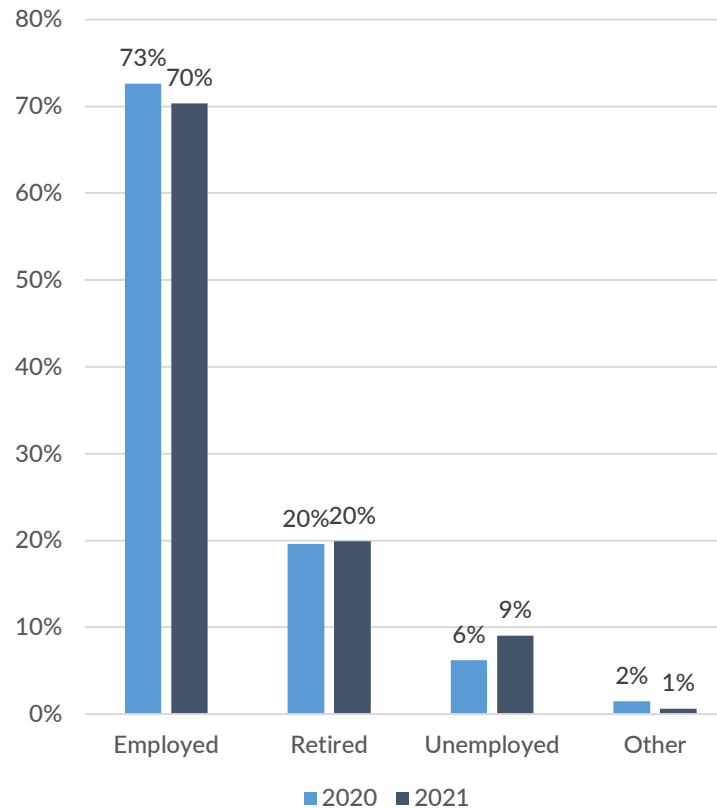| Geography	Average Monthly Transit Expenses (Self-reported)
South Tampa	$568.00
Downtown / Channelside / Harbor Island	$578.99
East Tampa / Ybor / Heights	$518.30
University / Sulphur Springs	$557.47
West Tampa	$602.03
New Tampa	$614.97

Sustainability & Resiliency | Workforce Development

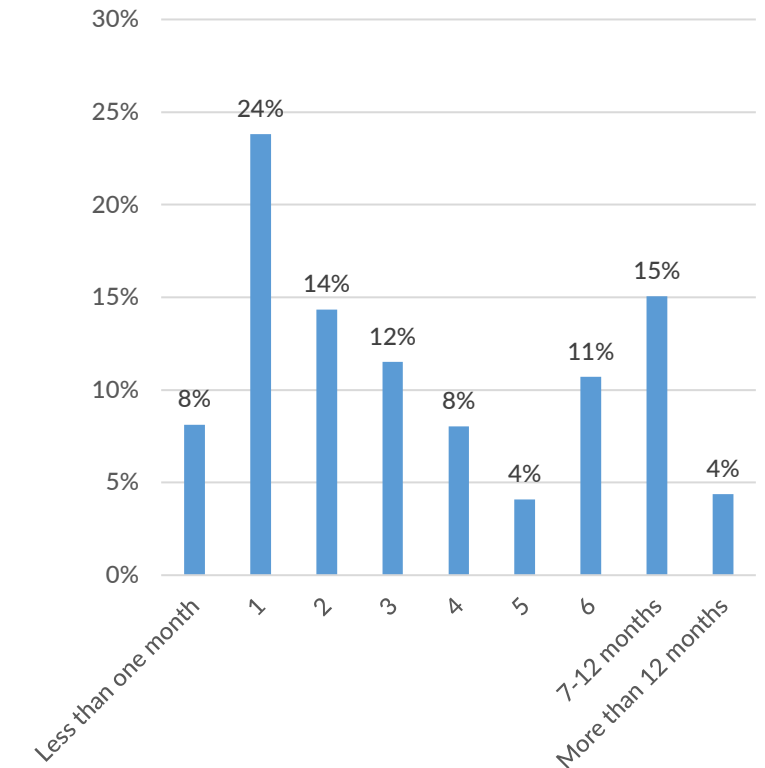# Sustainability & Resiliency | Workforce Development

On a scale from one to five, where one is "very poorly" and five is "very well," how do you feel that the City of Tampa has prepared for hurricanes, floods, and other natural disasters?

- 1- Very poorly: 2%
- 2: 3%
- 3: 41%
- 4: 31%
- 5- Very well: 23%
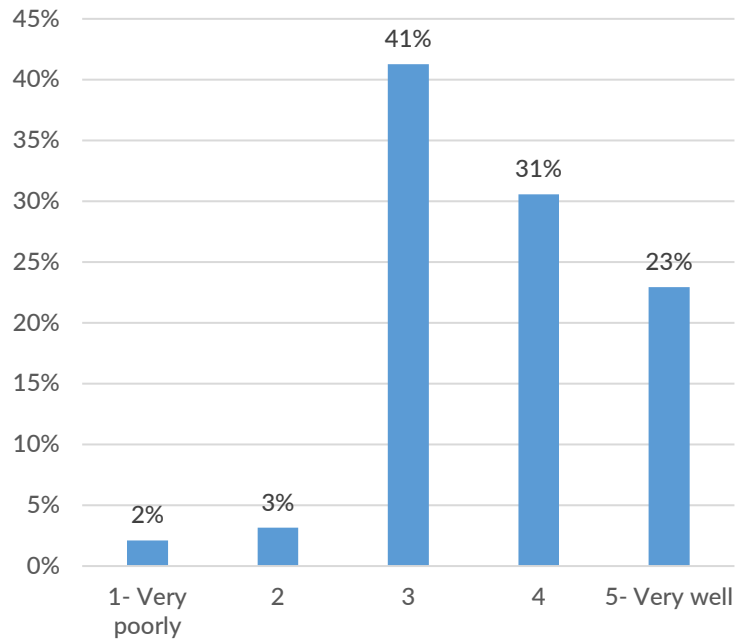
How would you define your employment status?

- Employed: 73% (2020), 70% (2021)
- Retired: 20% (2020), 20% (2021)
- Unemployed: 6% (2020), 9% (2021)
- Other: 2% (2020), 1% (2021)

2020 ■ 2021

For approximately how many months have you been looking for a job?

- Less than one month: 8%
- 1: 24%
- 2: 14%
- 3: 12%
- 4: 8%
- 5: 4%
- 6: 11%
- 7-12 months: 15%
- More than 12 months: 4%

Final Thoughts

Conclusion

- Trust in the City of Tampa improved markedly from 2020 to 2021

- Levels of recommendation are flat, except for opening a business, which saw a sizable improvement

- Residents feel that the city has improved its handling of both COVID and city issues; they also feel that the city is prepared for hurricanes, floods and other natural disasters

- Residents' expectations have changed substantially in just one year:
  - Roads, Affordable Housing, Personal Safety, and DEI issues have risen sharply in expectation
  - Career-related issues and Public transit have dropped sharply in expectation

- Traffic Flow, Quality Roads, and Affordable Housing are now the top three expectations

- Homeowners in the City have similar priorities to those in unincorporated Hillsborough County, prioritizing housing size and affordability over commutes
  - In contrast, renters prioritize location and affordability, caring substantially less about housing size

- A majority of current renters (60%) believe that they could find a home for sale in Tampa that meets their requirements

- The number one improvement that residents believe would encourage more walking and biking is for the city to increase enforcement of traffic laws; generally speaking, most ideas ultimately relate to separating vehicular traffic from other traffic

THANK YOU

HCP | 35 YEARS
Research | Strategy | Marketing

Mayor Jane Castor
Transforming Tampa's Tomorrow

This presentation contributes to Mayor Jane Castor's Transforming Tampa's Tomorrow initiative.