

WELCOME

2022 Community Values Survey

Created for the City of Tampa by HCP Associates

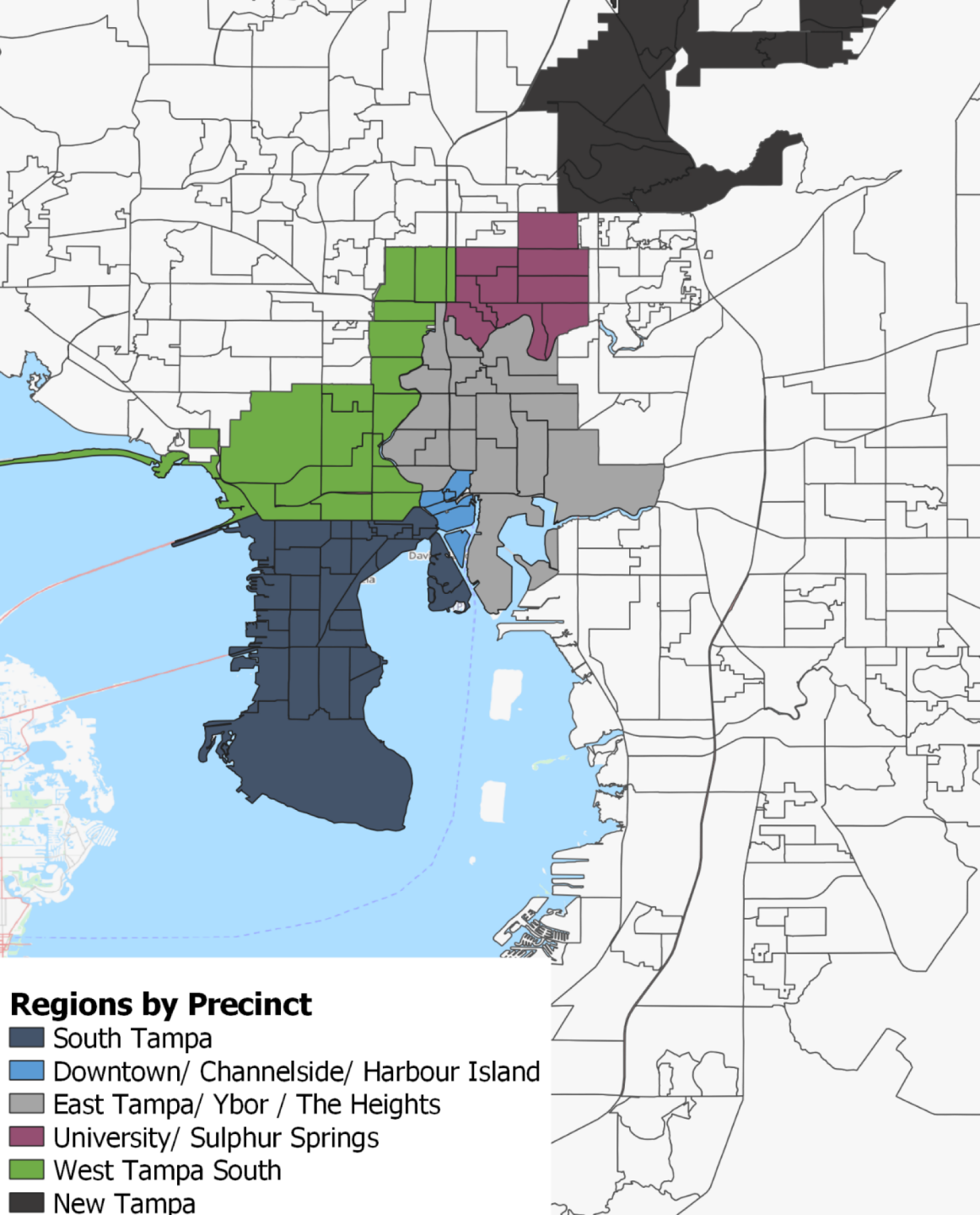


Introduction

- **Third** iteration of study for the City of Tampa's strategic priorities for the community
- Can trend metrics from previous studies conducted in 2020 and 2021
- 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: $\pm 2.71\%$ at a 95% confidence level
- Data collection: April 14, 2022, through May 26, 2022
- Telephonic survey using both landlines and cellphones
- Average length of survey: 16 minutes
- Five respondent demographics were controlled: age, gender, race/ethnicity, educational attainment, and homeownership status

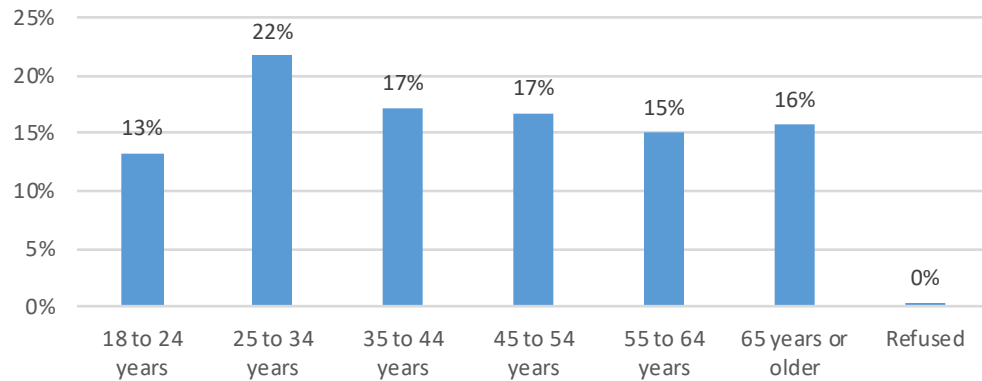


Study Regions

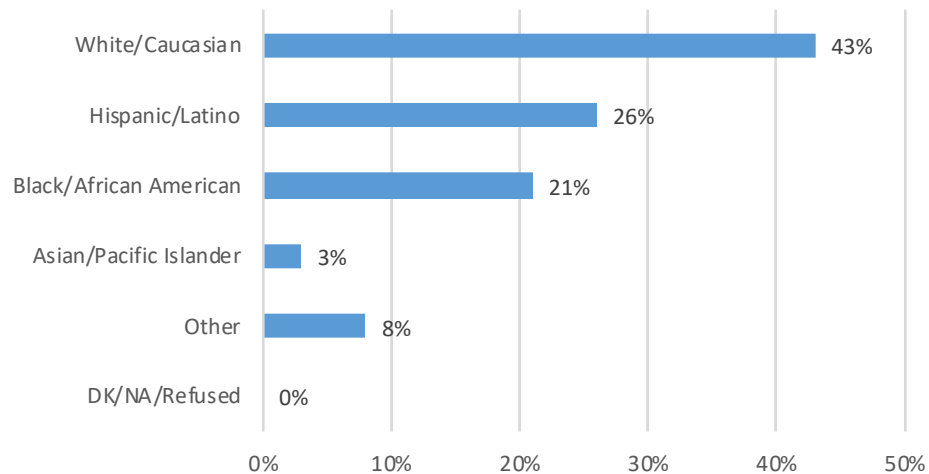
- Data was segmented into six regions to provide analysis of different parts of the city

Respondent Profile

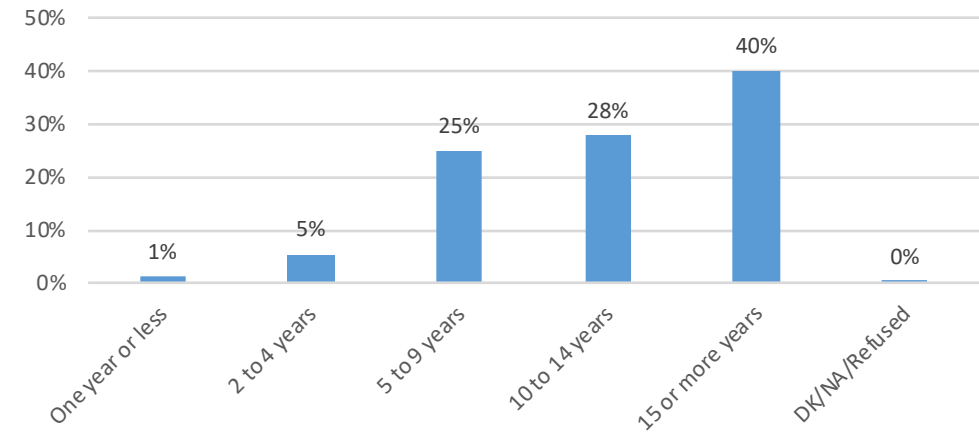
In which of the categories does your current age fall?



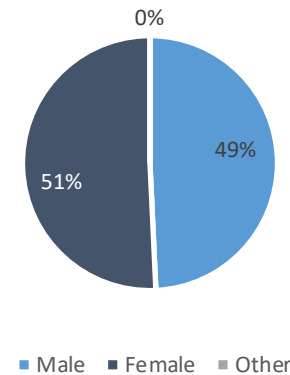
Which option most closely describes your race?



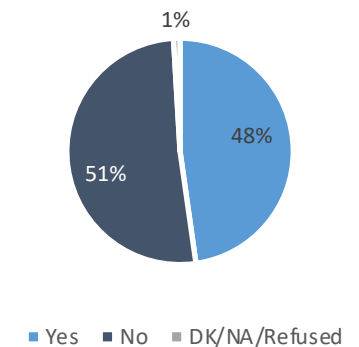
How long have you been a City of Tampa resident?



How would you describe your gender?

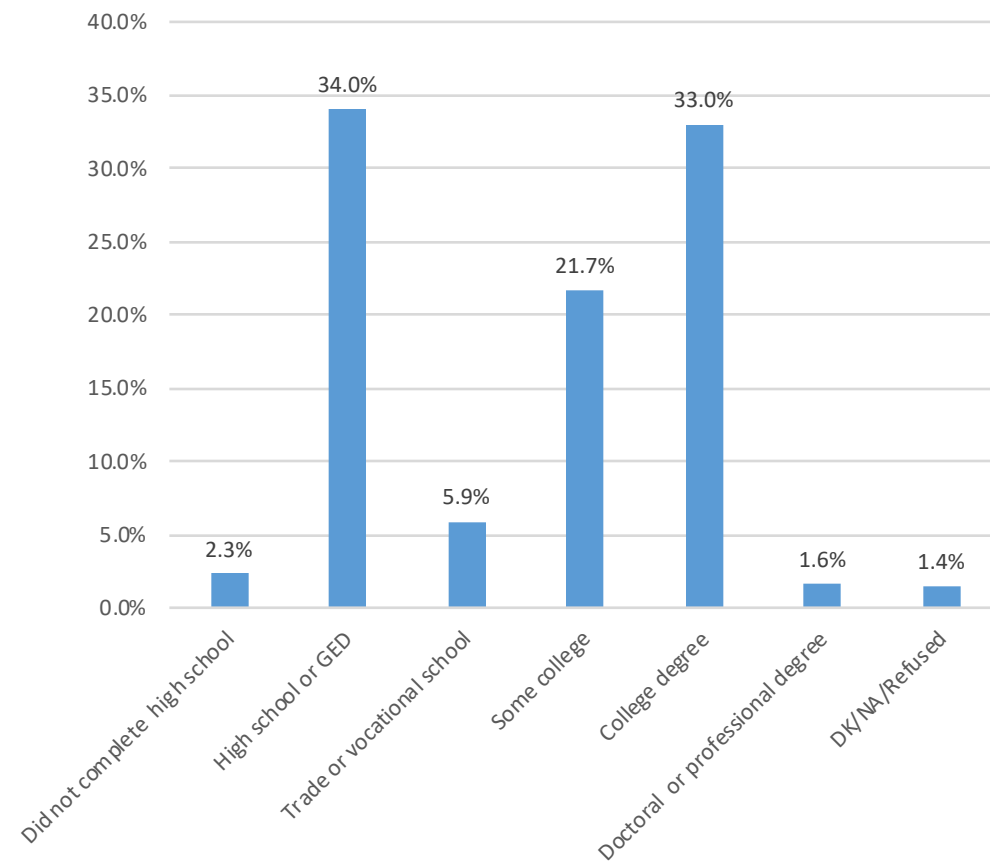


Do you have children under the age of 18 living in your household full-time?

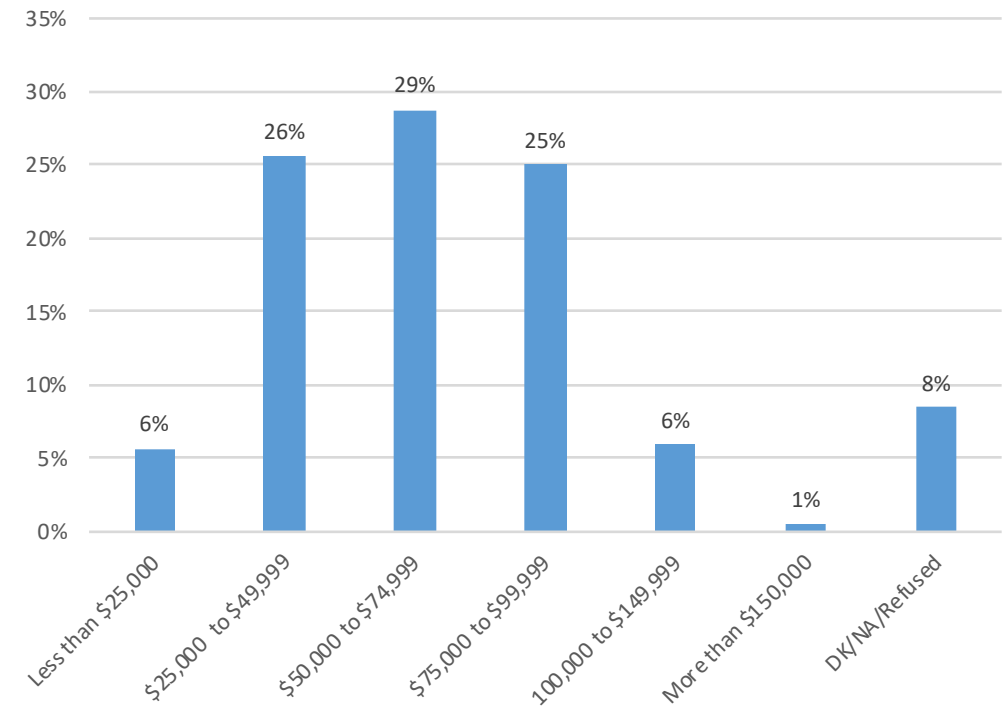


Respondent Profile

What is your highest level of completed education?



Into what range does your annual household income fall?

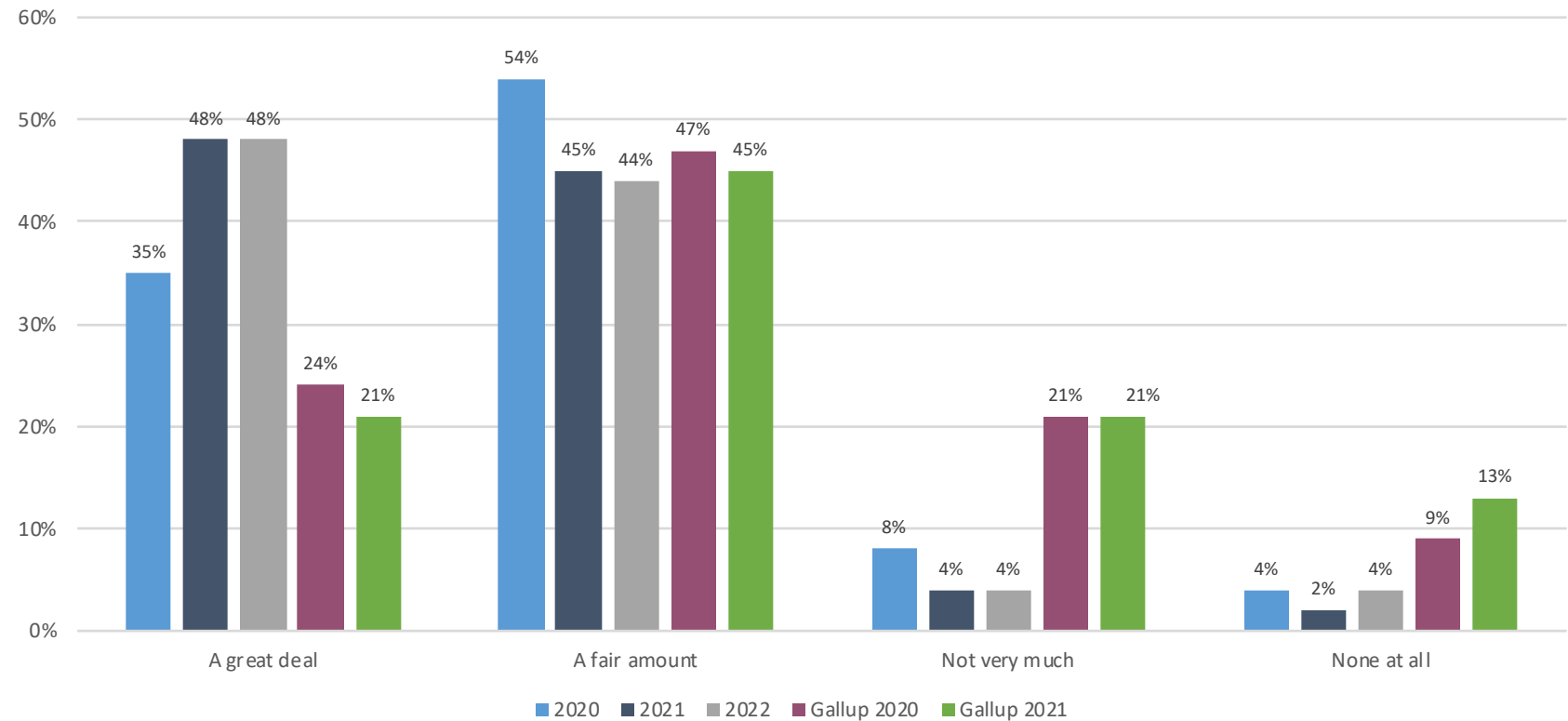




Top-line Approval

Trusting Local Government

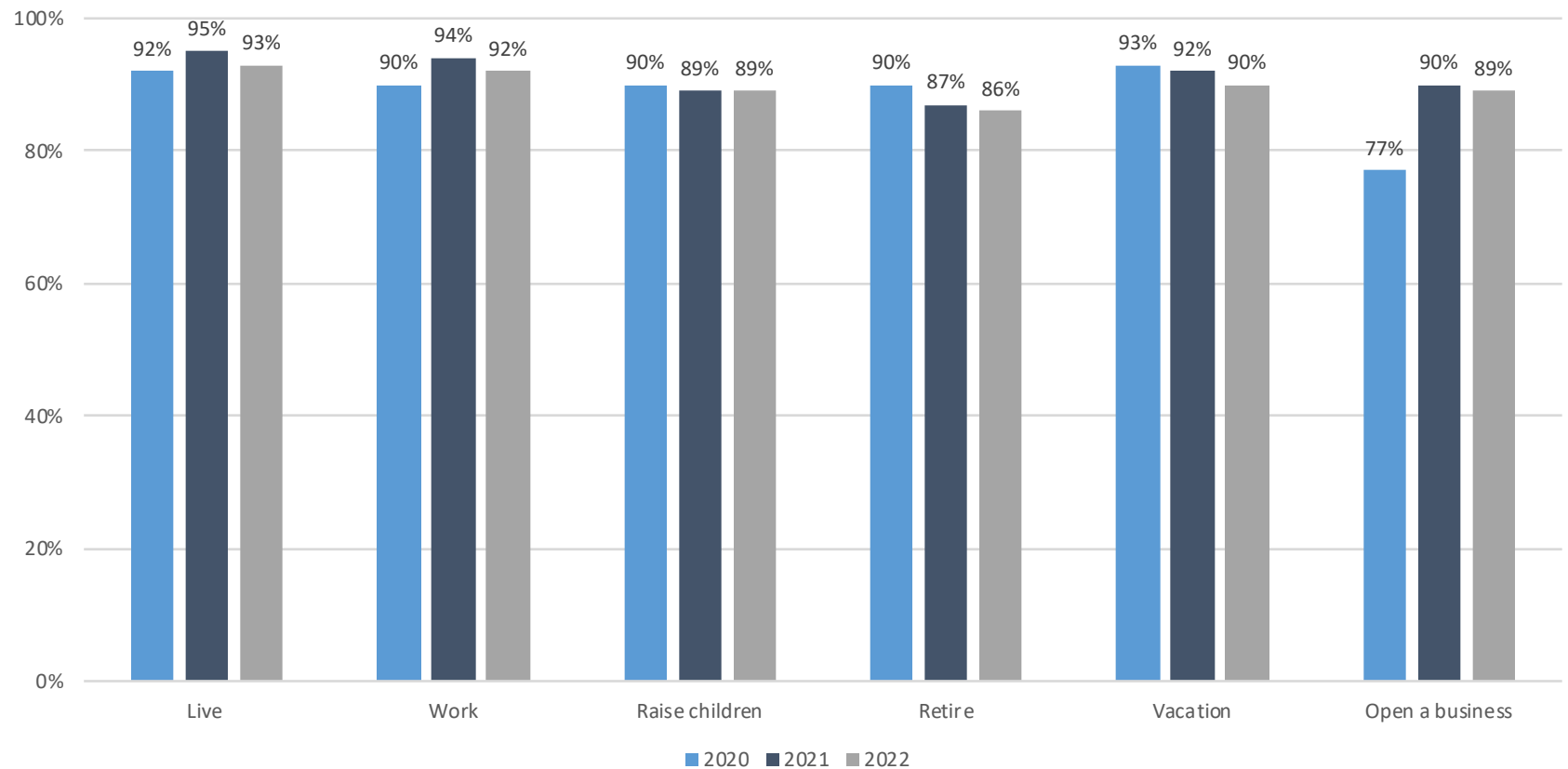
How much trust and confidence do you have in the City of Tampa's government when it comes to handling issues in the City?



*Gallup's question asked respondents how much trust they had in their local government.

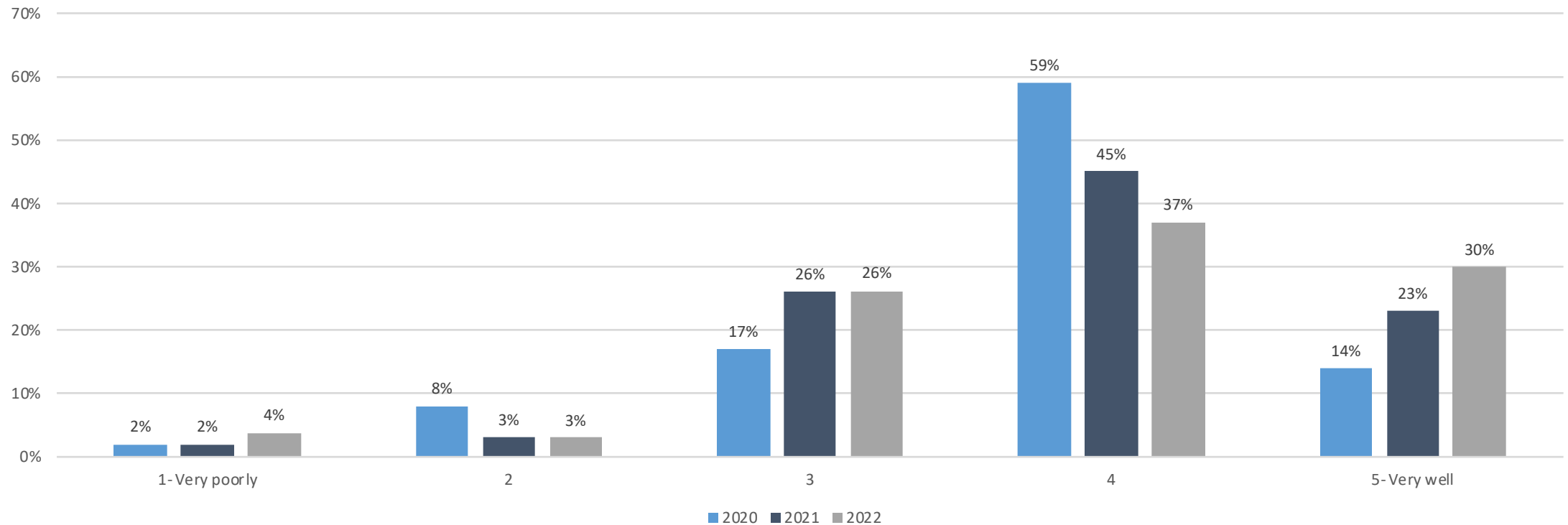
Recommending Tampa

Would ("probably" + "definitely") recommend the City of Tampa to a friend, family member or acquaintance as a place to __:



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 city issues in general?



2020 Mean: 3.75

2021 Mean: 3.84

2022 Mean: 3.85

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 **8.58** among all categories

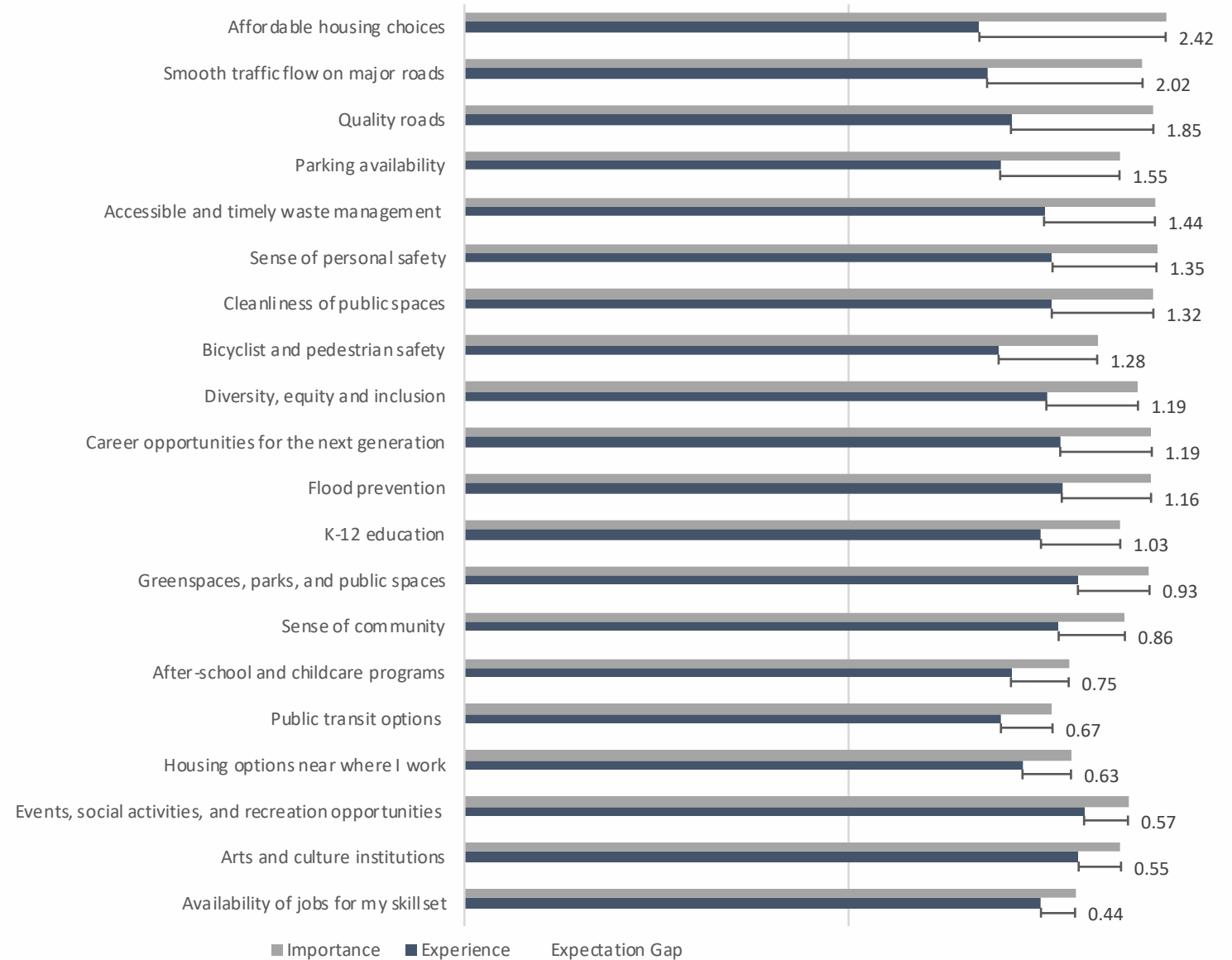
Experience

- **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 **7.42** among all categories
















Expectation Gap

- Calculated as *(Importance – Experience)*
- A higher expectation gap is a bad thing
- The **average** expectation gap is **1.16**

Expectation Gaps Ranked



Expectation Gaps: 2020 - 2022

	2020	2021	2022
1 st	 Smooth traffic flow	 Smooth traffic flow	 Affordable housing choices
2 nd	 Bicyclist and pedestrian safety	 Quality roads	 Smooth traffic flow
3 rd	 Parking availability	 Affordable housing choices	 Quality roads
4 th	 Flood prevention	 Flood prevention	 Parking availability
5 th	 Cleanliness of public spaces	 Parking availability	 Accessible and timely waste management

Expectations by Region

2021 Expectations

	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

2022 Expectations

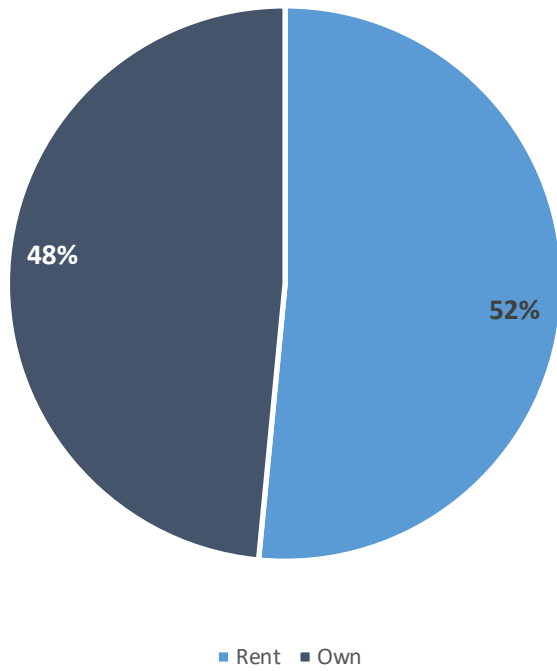
	Largest	Second Largest	Third Largest
South Tampa	Affordable housing choices	Smooth traffic flows on major roads	Quality roads
Downtown	Affordable housing choices	Quality roads	Smooth traffic flow on major roads
East Tampa	Smooth traffic flow on major roads	Quality roads	Affordable housing choices
University	Affordable housing choices	Smooth traffic flow on major roads	Quality roads
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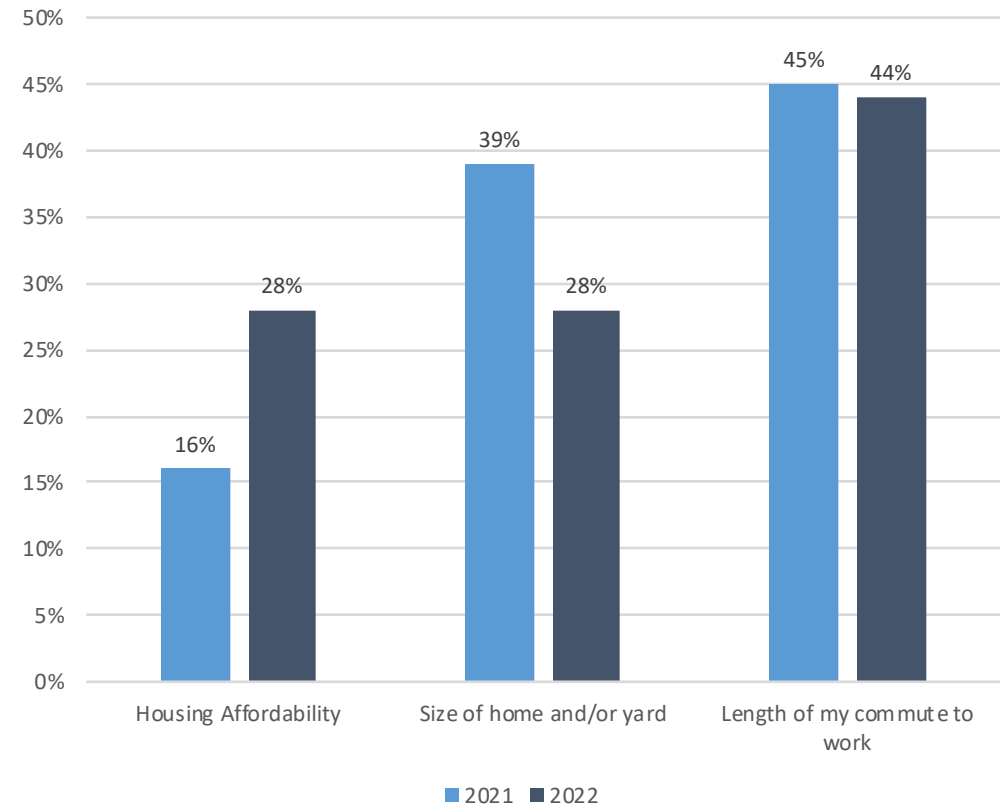
Affordable Housing

Housing Factors

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

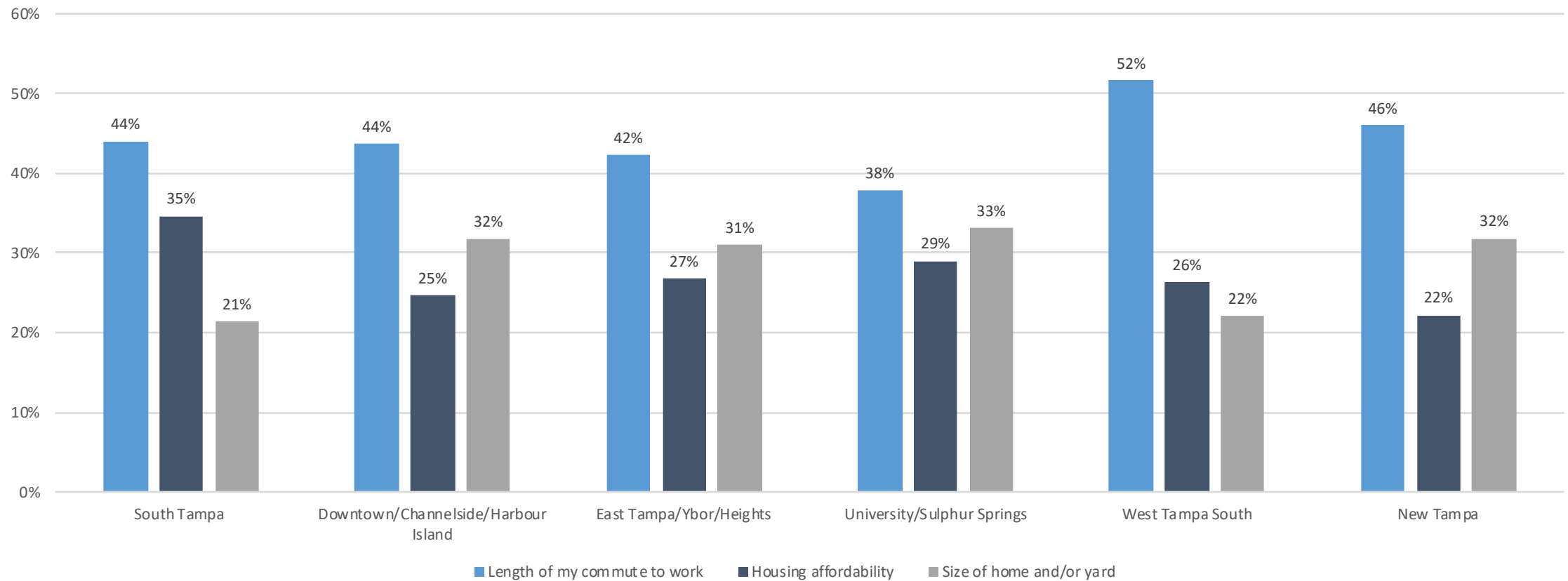


Which of the following is **least** important to you when considering your choice of where to live?



Housing Factors

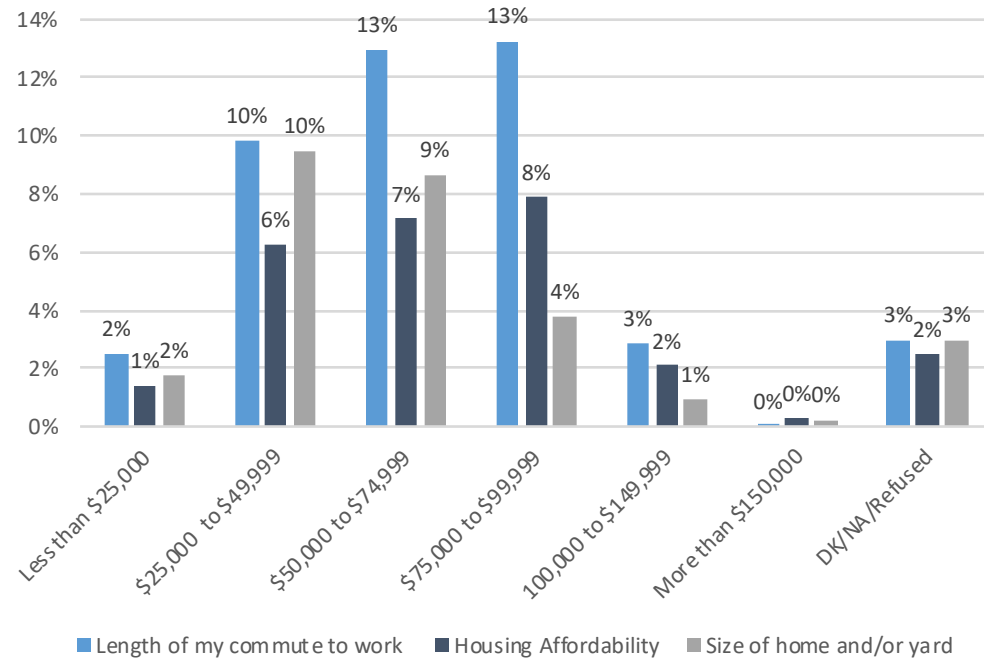
Which of the following is least important to you when considering your choice of where to live?
Geography



Housing Factors

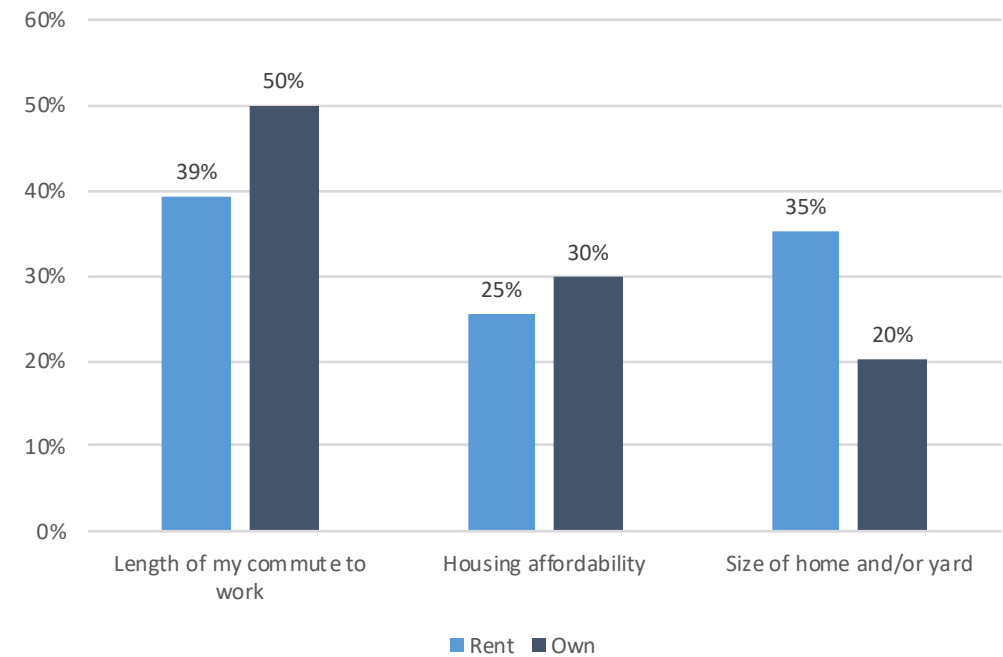
Which of the following is **least** important to you when considering your choice of where to live?

Income

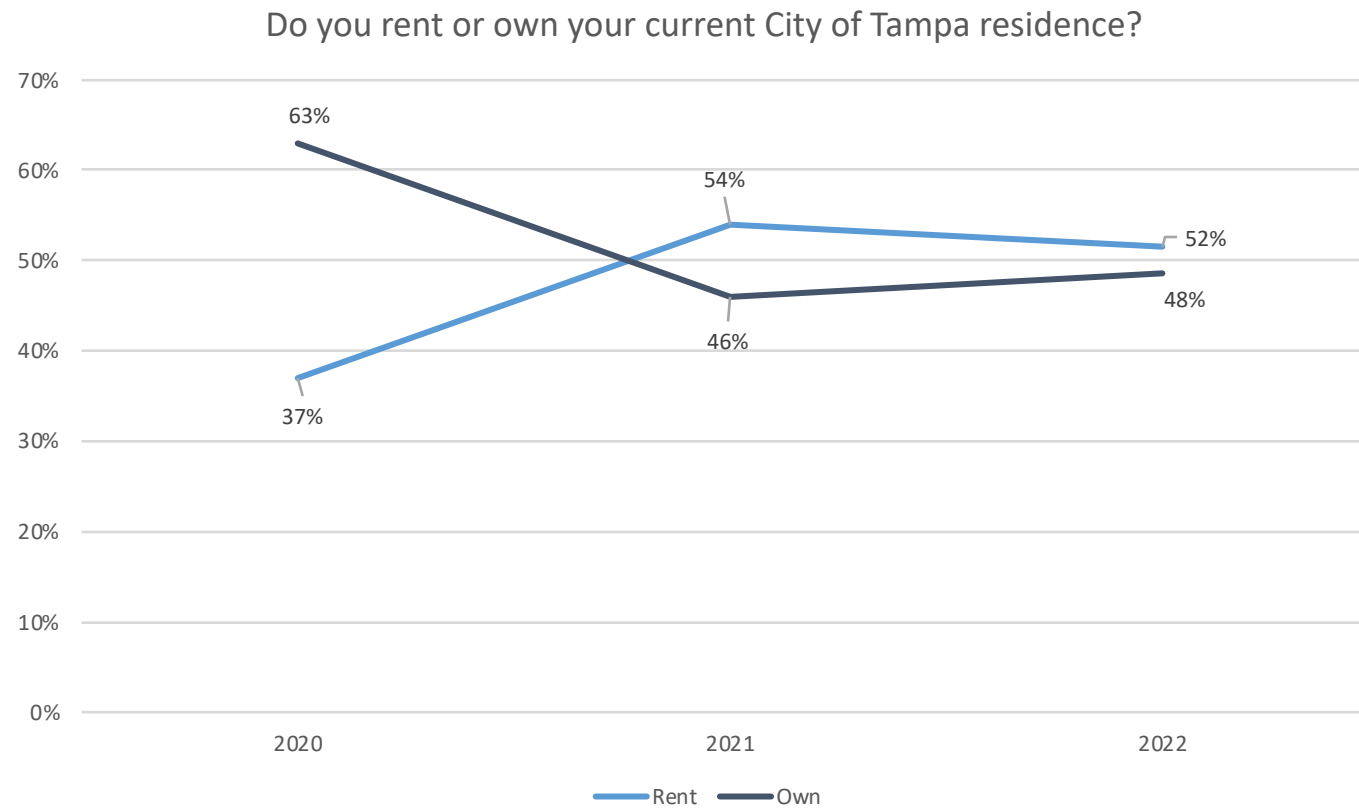


Which of the following is **least** important to you when considering your choice of where to live?

Homeownership



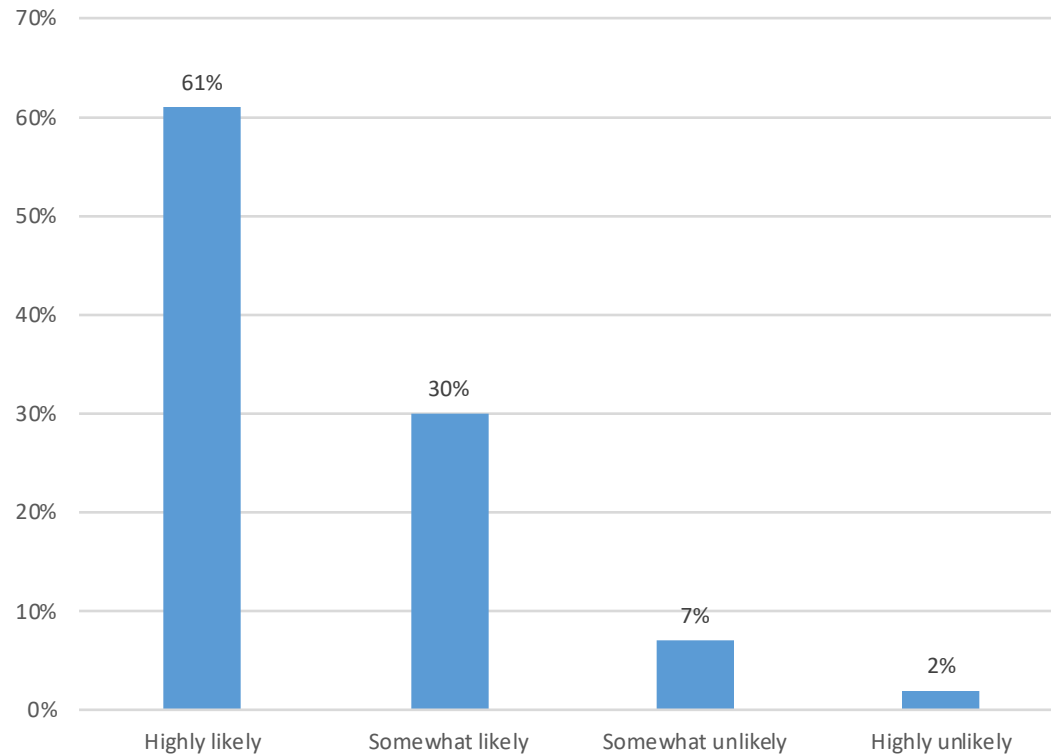
Housing Expenses



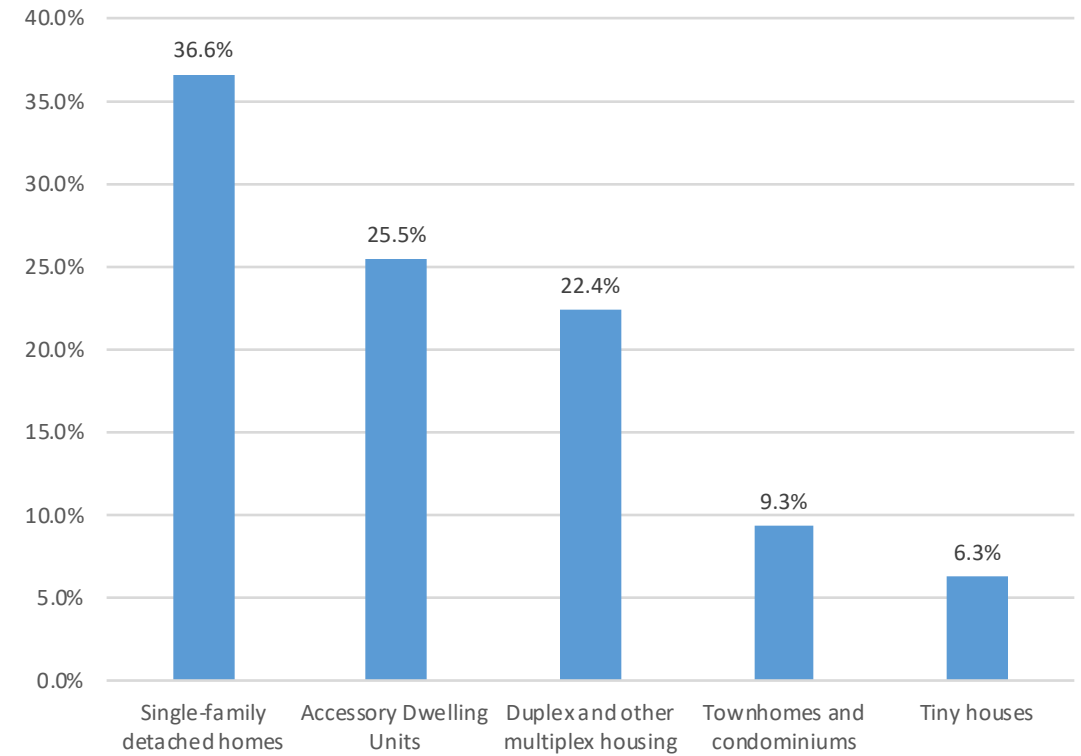
Geography	Average Monthly Housing Expenses (Self-reported)
South Tampa	\$1,914
Downtown / Channelside / Harbor Island	\$1,651
East Tampa / Ybor / Heights	\$1,707
University / Sulphur Springs	\$1,593
West Tampa	\$1,582
New Tampa	\$1,639

Housing Choices

If you had to guess, how likely is it you will be living in the City of Tampa in five years from now?



Which type of housing would you like to see more of in Tampa?

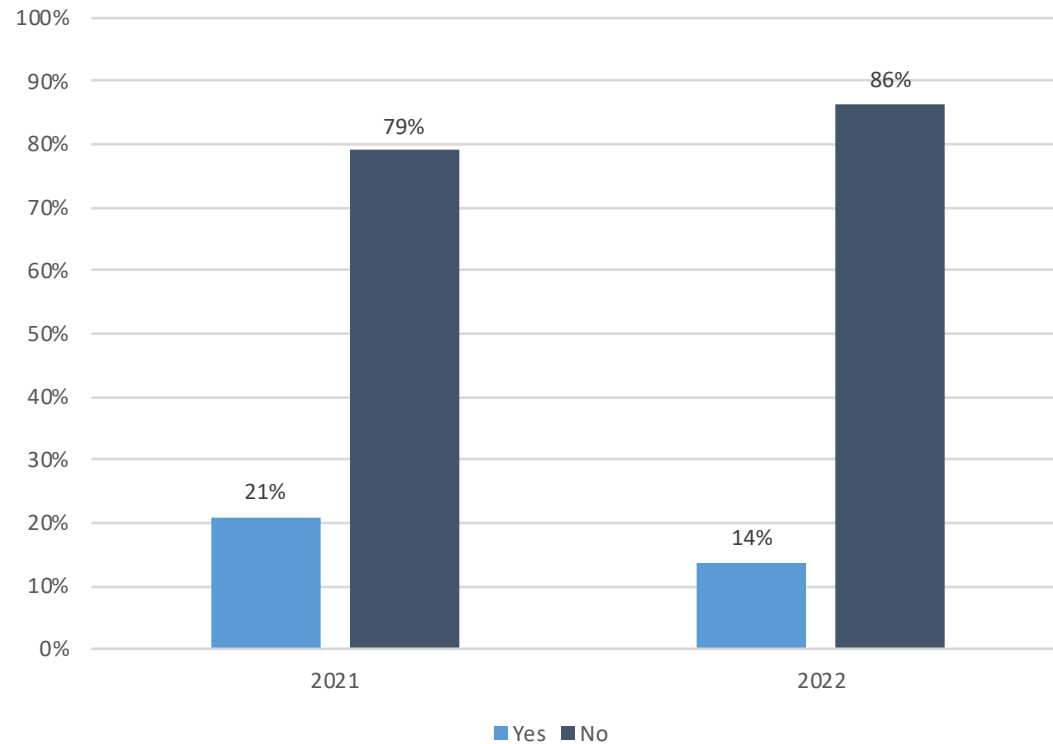




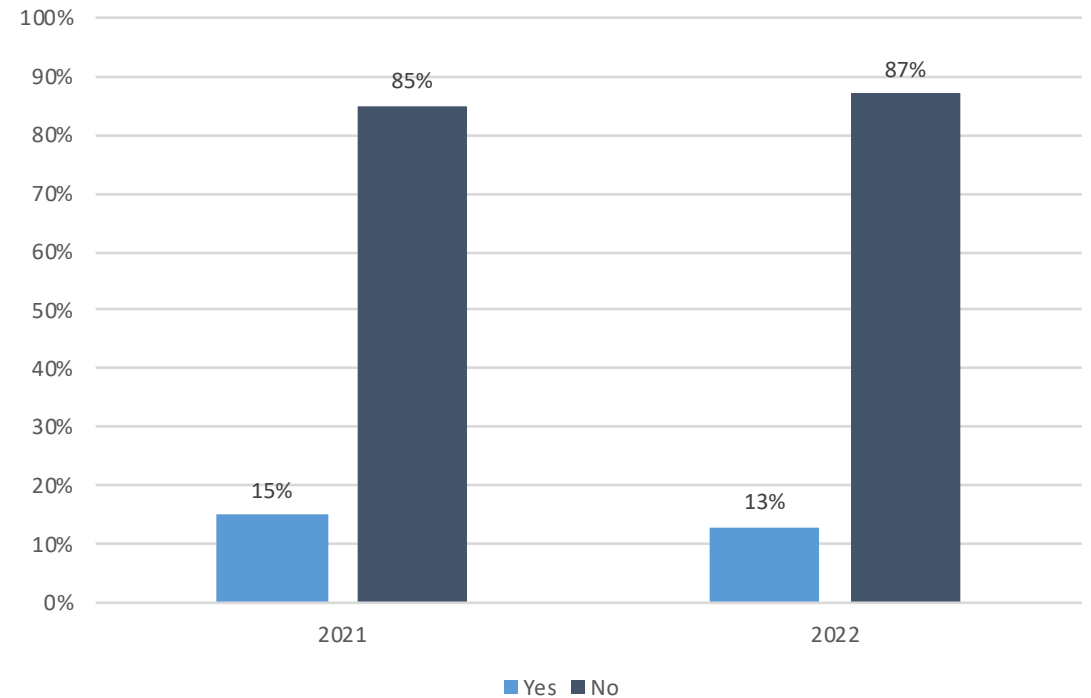
Transportation

Walkability and Two Wheels

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



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



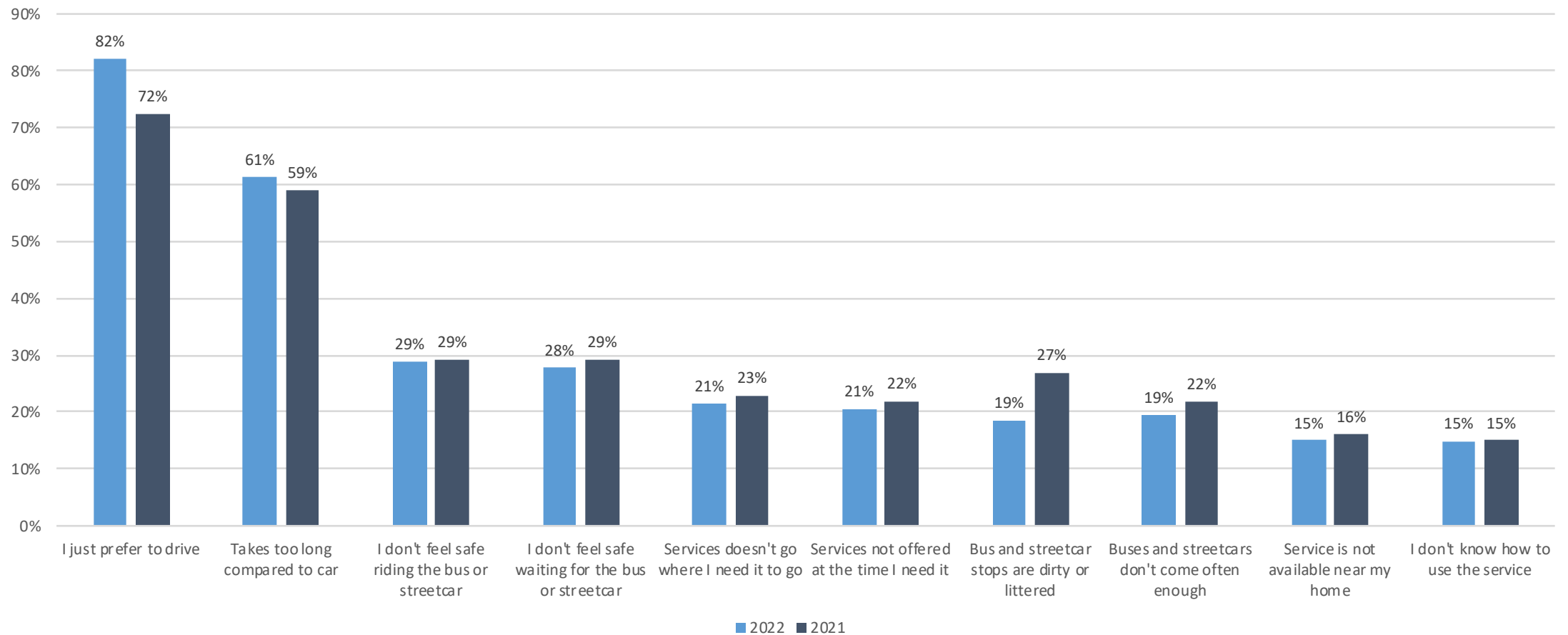
Improvements

	2022	2021 Walk	2021 Bike
Don't know	36.2%	45%	53%
Less Traffic	26.0%	9%	7%
Nothing	8.9%	8%	6%
Improved Bike Lanes/Sidewalks	6.3%	5%	7%
More Traffic Enforcement	4.8%	10%	9%
Improve Overcrowdedness	3.7%	0%	0%
More Bike Lanes/Sidewalks	3.4%	6%	4%
More Personal Safety	2.1%	4%	1%
Other	2.0%	2%	2%
More Shade	1.9%	5%	1%
Improved Parking	1.8%	0%	0%
Incentives	1.7%	0.5%	0%
More Lighting	0.6%	0.5%	1%
Better Lighting	0.5%	0%	0%
Improved Personal Safety	0.0%	0%	0%
Walking/Biking oriented design	0.0%	2%	1%
Separate Bike Lanes/Sidewalks	0.0%	1%	6%

- The number one suggestion – beyond “don’t know” – is to reduce the amount of traffic in the city.
 - Over a quarter (26 percent) of responses indicate that problems with traffic created a barrier for many citizens to walk or bike regularly.
 - This category increased by about 18-points from 2021
- More traffic enforcement has noticeably decreased from 2021 with less than 5% of respondents indicating this would encourage more walking, biking, and scooting.

Transit Factors

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

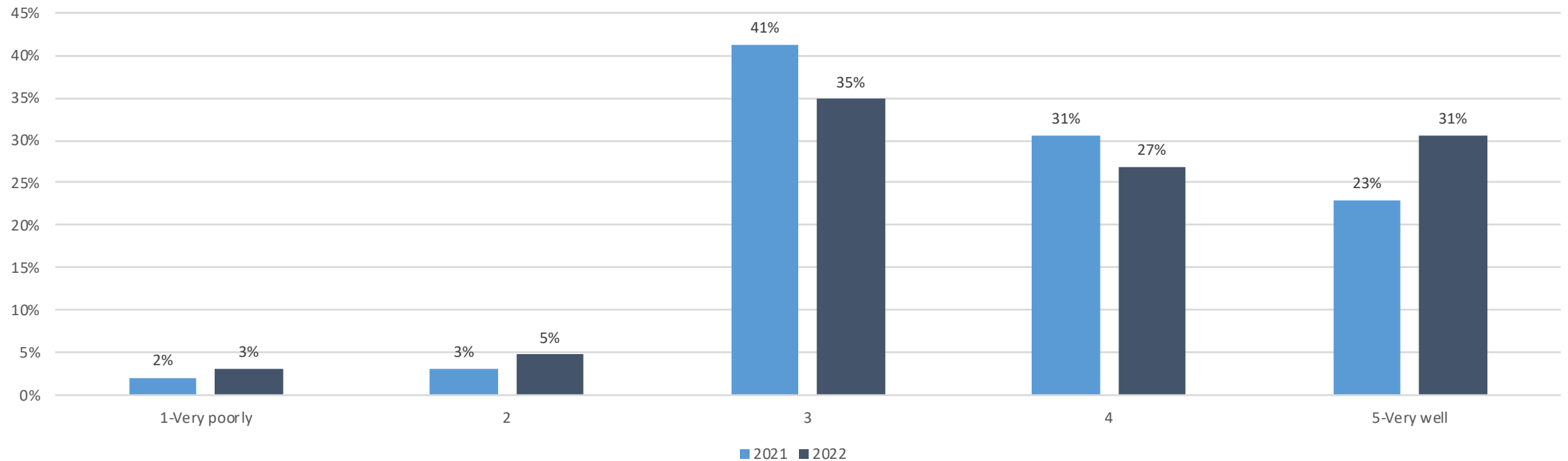




Sustainability & Resiliency | Workforce Development

Sustainability & Resiliency

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?

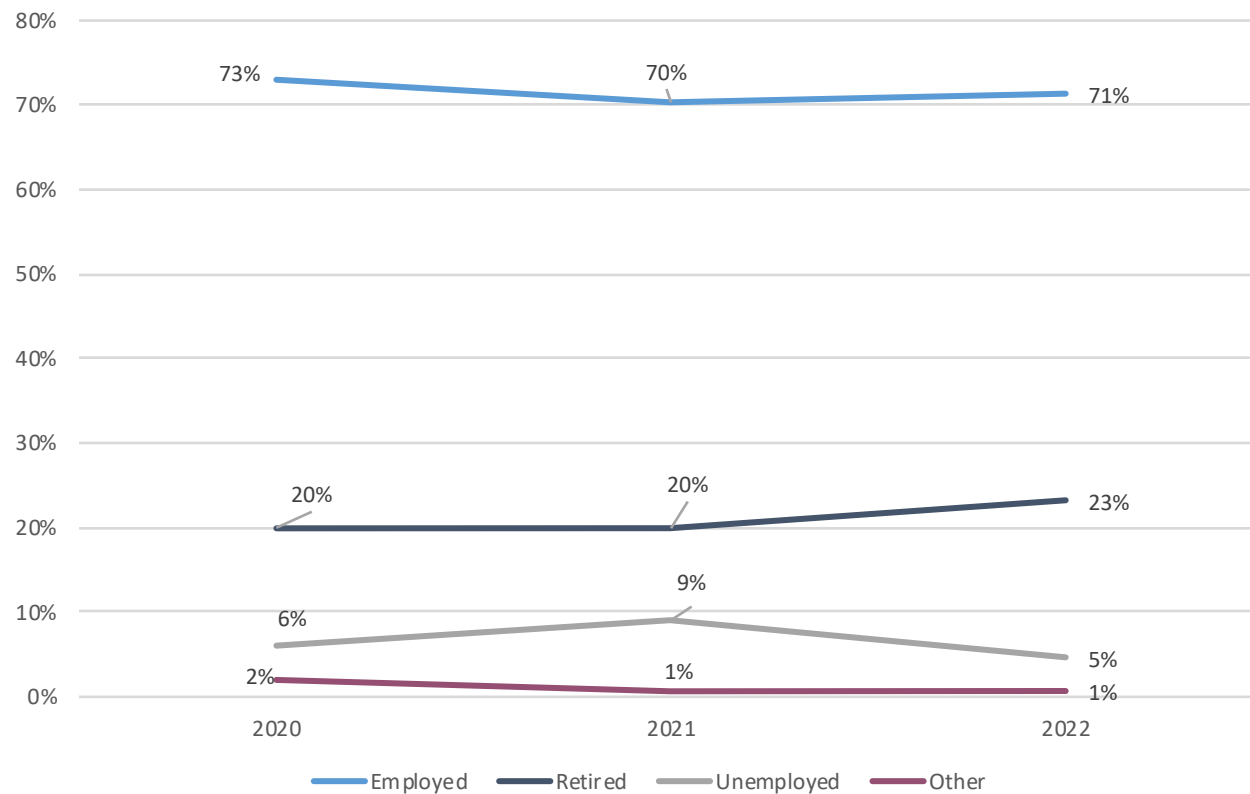


2021 Mean: 3.69

2022 Mean: 3.76

Workforce Development

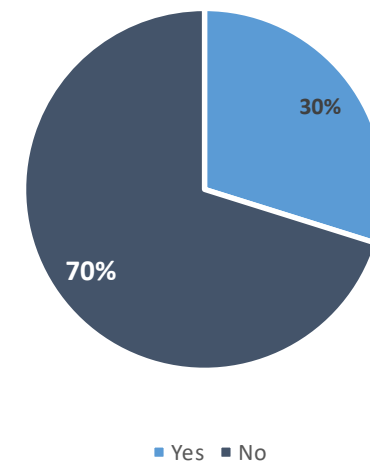
How would you define your employment status?



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

Length of Unemployment (in Months)	
Mean	8.62
Median	3

Are you currently enrolled in school, vocational training, or some other type of workforce training program?





Final Thoughts

Conclusion

- Trust in the City of Tampa remained high from 2021 to 2022
- Levels of recommendation for all categories are consistently high
- Residents continue to report high positive levels of trust and confidence in the city's handling of general issues; they also continue to feel that the city is prepared for hurricanes, floods, and other natural disasters
- There have been noticeable changes in some expectation gaps
 - "Flood prevention" fell seven places between 2020 and 2021 compared to 2022
 - "Diversity, equity, and inclusion" and "Sense of personal safety" have moved up eight spots since 2020
- Affordable housing has moved up rapidly to the largest expectation gap in three years
 - Number 12 in 2020 to Number 1 in 2022
- Homeowners in Tampa prioritize the size of their home, while renters place more importance on housing affordability
 - However, both groups ranked the length of their commute as the least important issue when choosing where to live
- The number one improvement that residents believe would encourage more walking and biking is less traffic in the city
 - Only category besides "Don't Know" to be reported by more than a quarter of respondents

THANK YOU

