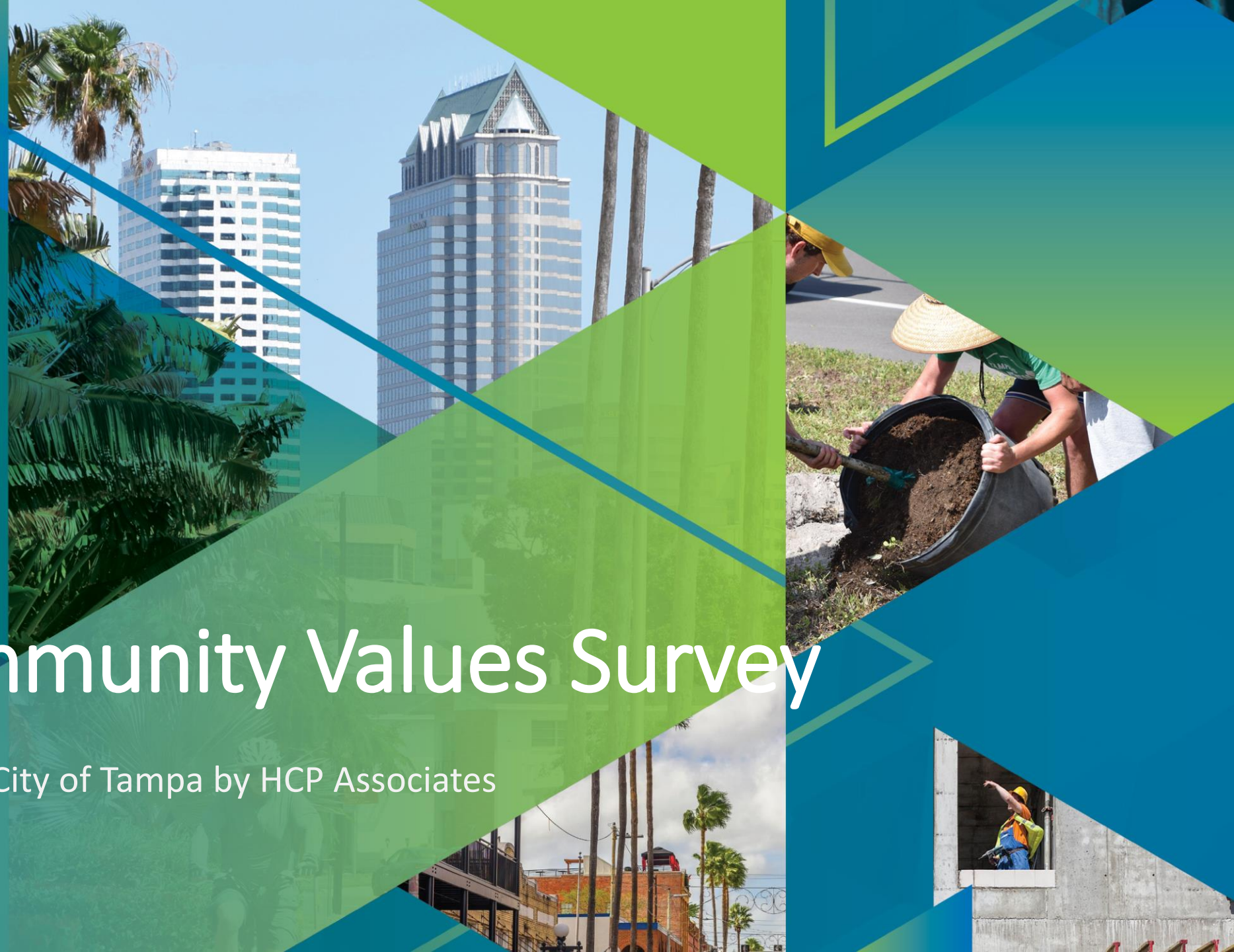


**TAMPA
THRIVES**

2024 Community Values Survey

Created on behalf the City of Tampa by HCP Associates

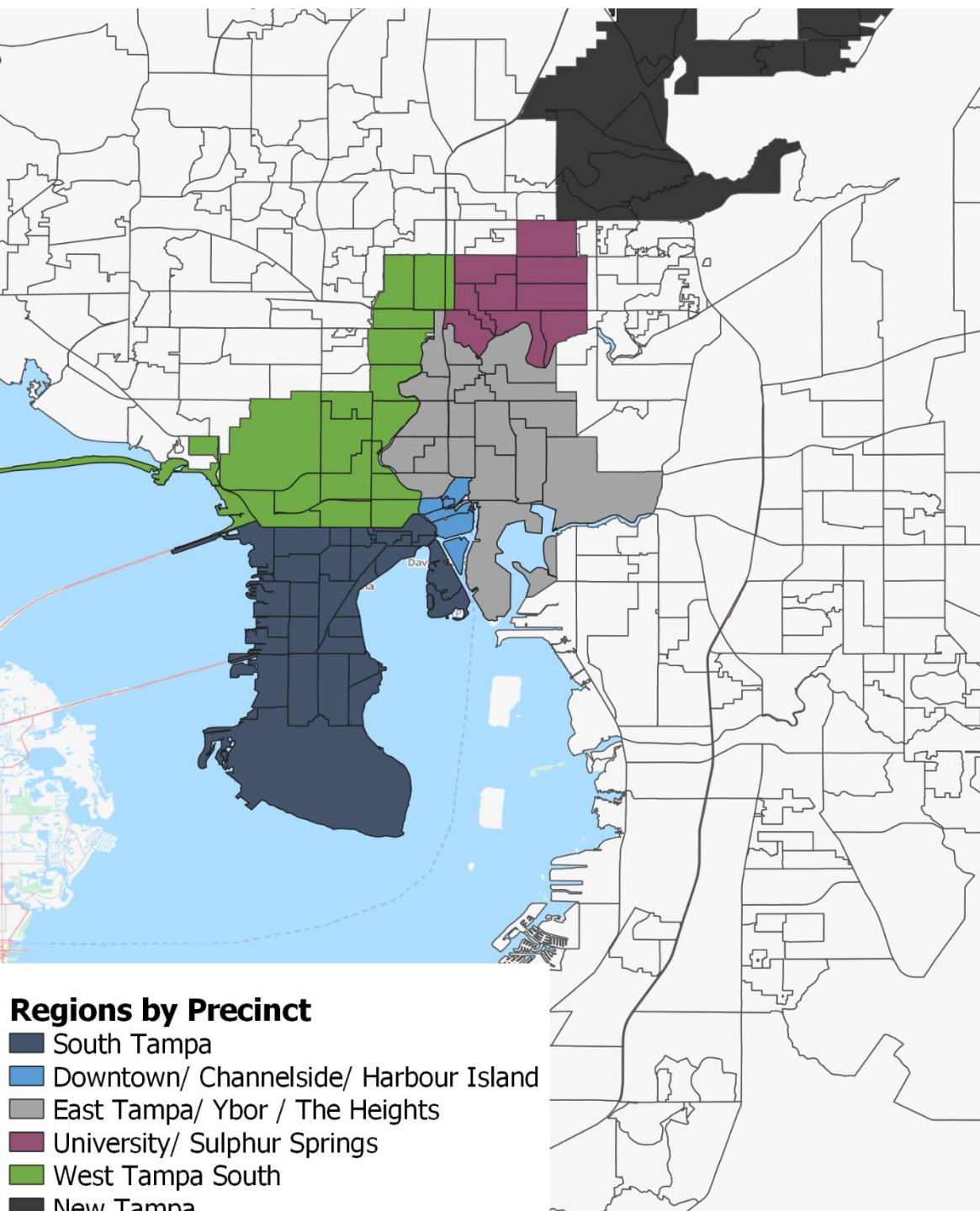


Introduction

- **Fifth** iteration of study for the City of Tampa's strategic priorities for the community
- Can trend metrics from previous studies conducted in 2020, 2021, and 2022, and 2023
- **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 pertinent city issues including:
 - *Affordable Housing*
 - *Transportation*
 - *Bicyclist and Pedestrian Safety*
 - *Neighborhood Parks*
 - *Public Safety*

Methodology

- Total respondents: 1,300 City of Tampa residents aged 18+
 - An additional 200 residents sampled in East Tampa; additional analysis conducted on 223 East Tampa residents
- Margin of error: $\pm 2.71\%$ at a 95% confidence level for at-large results
- Data collection: June 21, 2024, through September 1, 2024
- Telephonic survey using both landlines and cellphones
- Five respondent demographics were controlled: age, gender, race/ethnicity, educational attainment, and homeownership status

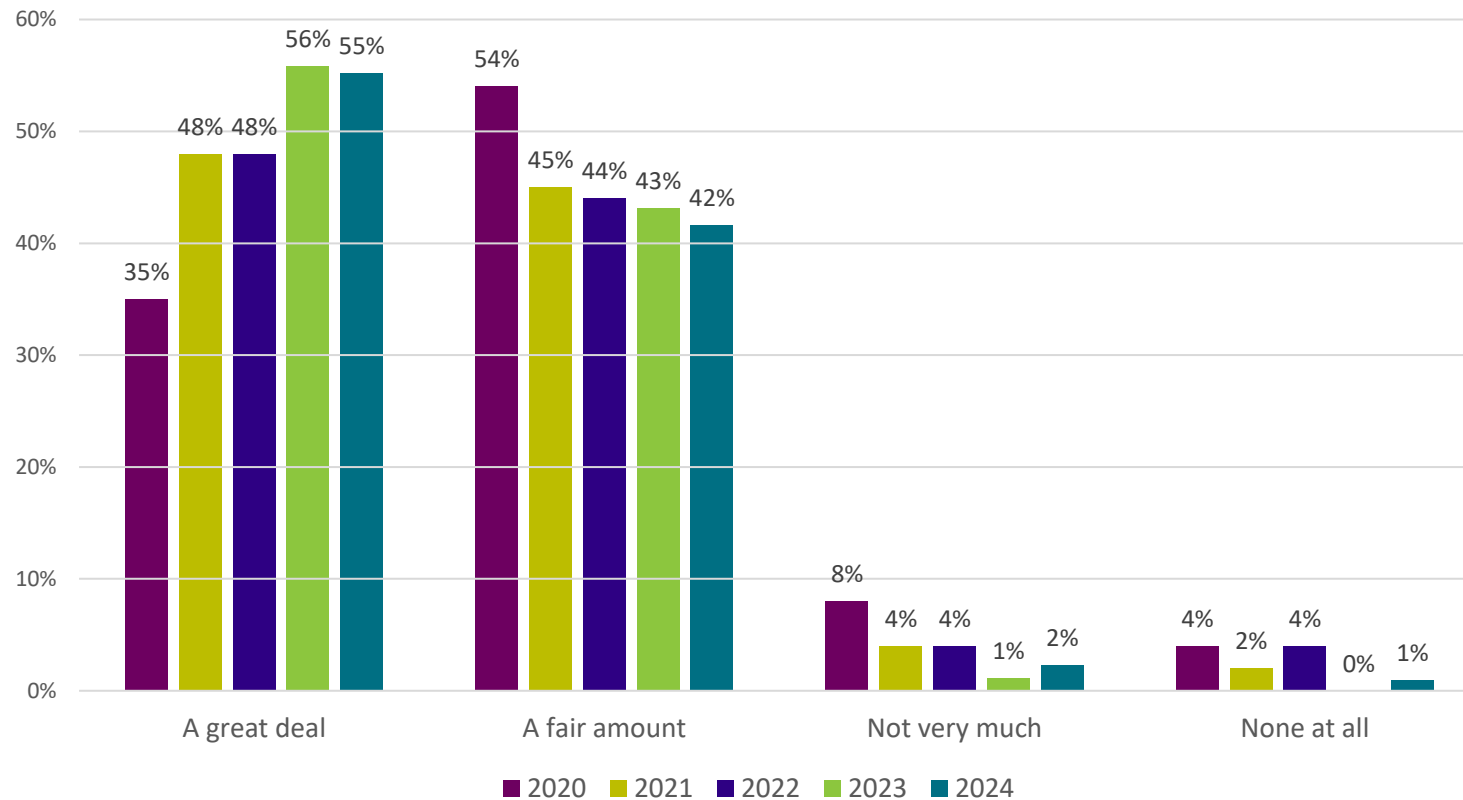


Data was segmented into six regions to provide analysis of different parts of the city.

Regional crosstabulations for all questions are available in the full report.

Trust and Confidence

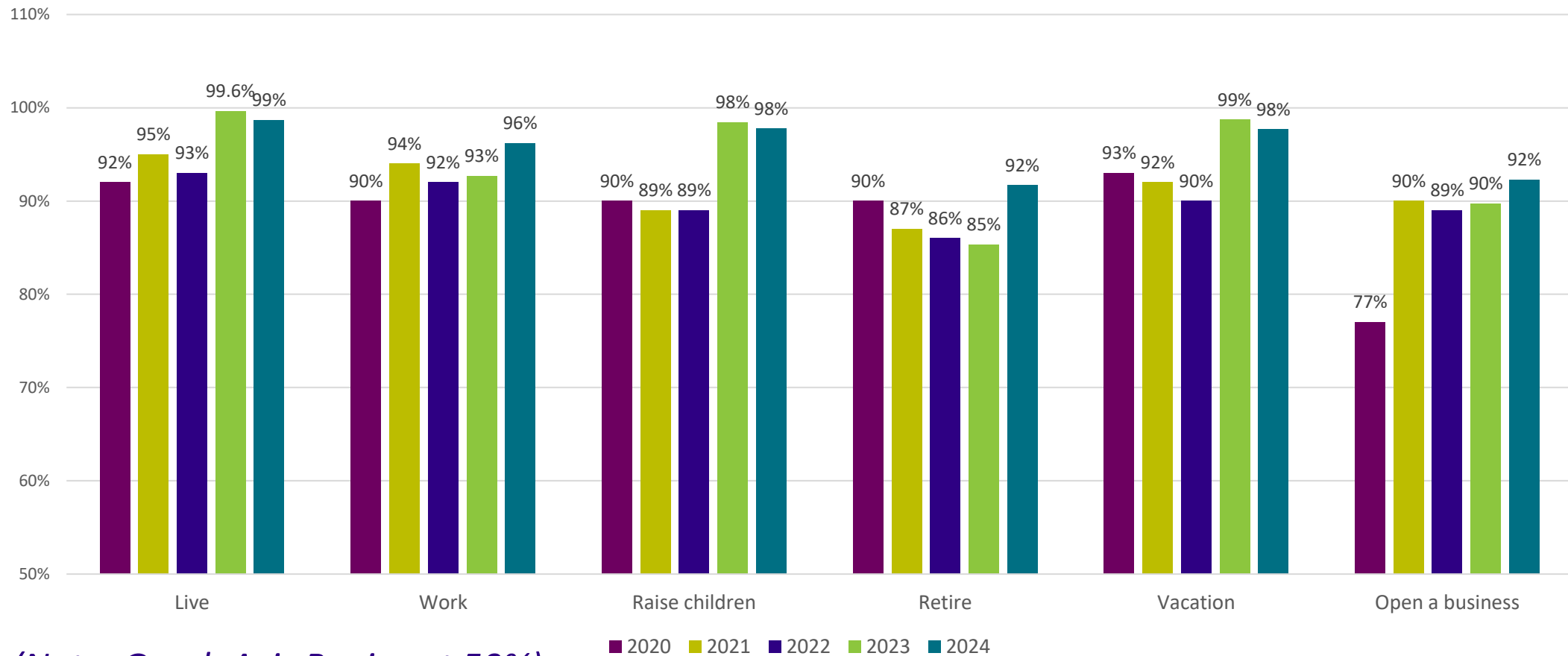
How much trust and confidence do you have in the City of Tampa government when it comes to handling issues in the City?



- Trust and confidence remain high within our sample
 - Therefore, the difference in *enthusiasm* – those saying “a great deal” versus “a fair amount” – is the most salient measure
 - However, there is no significant difference in enthusiasm levels between 2023 and 2024

Recommendation

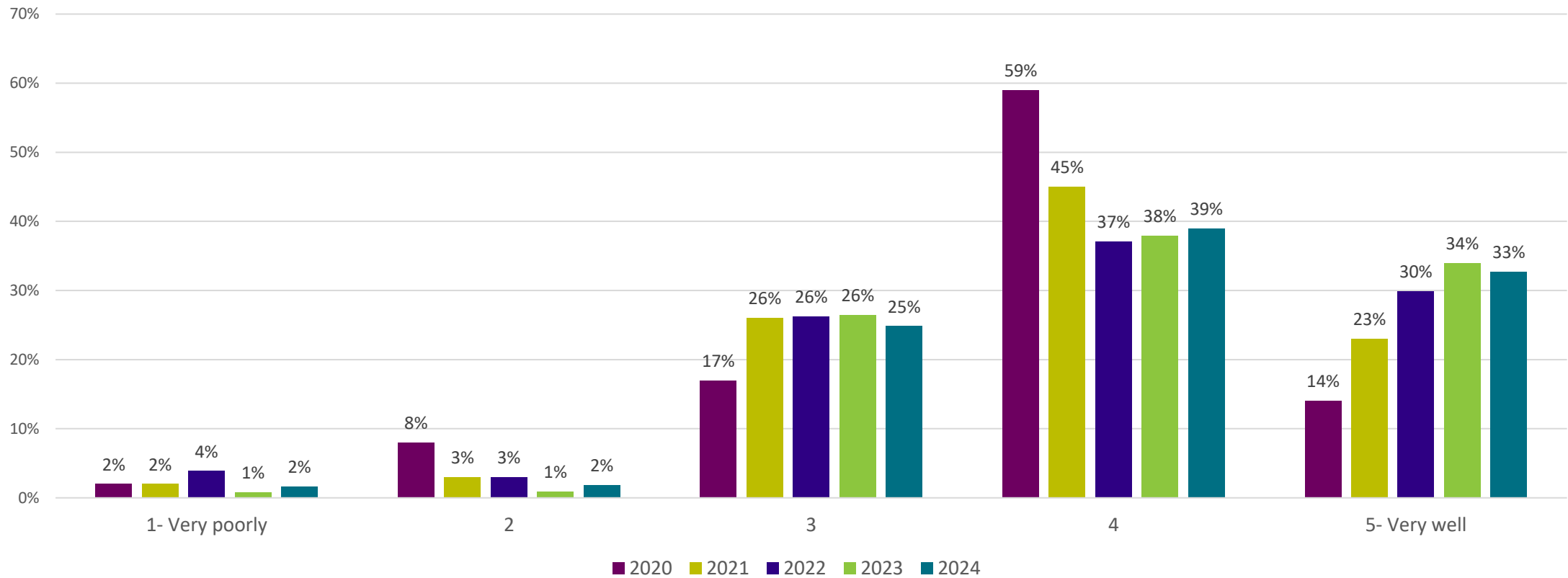
Would ("probably" + "definitely") recommend the City of Tampa to a friend, family member, or acquaintance as a place to __ :



(Note: Graph Axis Begins at 50%)

Handling City Issues

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?



Community Characteristics

Housing	Community and Amenities	Transportation	Jobs and Education	Public Safety
<ul style="list-style-type: none"> Affordable housing choices Housing options near where I work 	<ul style="list-style-type: none"> Sense of Community Events, social activities, and recreation opportunities Arts and cultural institutions Greenspaces, parks, and public spaces Diversity, equity, and inclusion 	<ul style="list-style-type: none"> Quality roads Public transit options Smooth flow of traffic on major roads Parking availability Bicyclist and pedestrian safety 	<ul style="list-style-type: none"> K-12 Education After-school and childcare programs Availability of jobs for my skillset Career opportunities for the next generation 	<ul style="list-style-type: none"> Sense of personal safety Cleanliness of public spaces Accessible and timely waste management Flood prevention

Importance

- Question Phrasing:** How important is it to you personally, that your community possesses the following characteristics?
- The **average** score is **8.89** among all categories

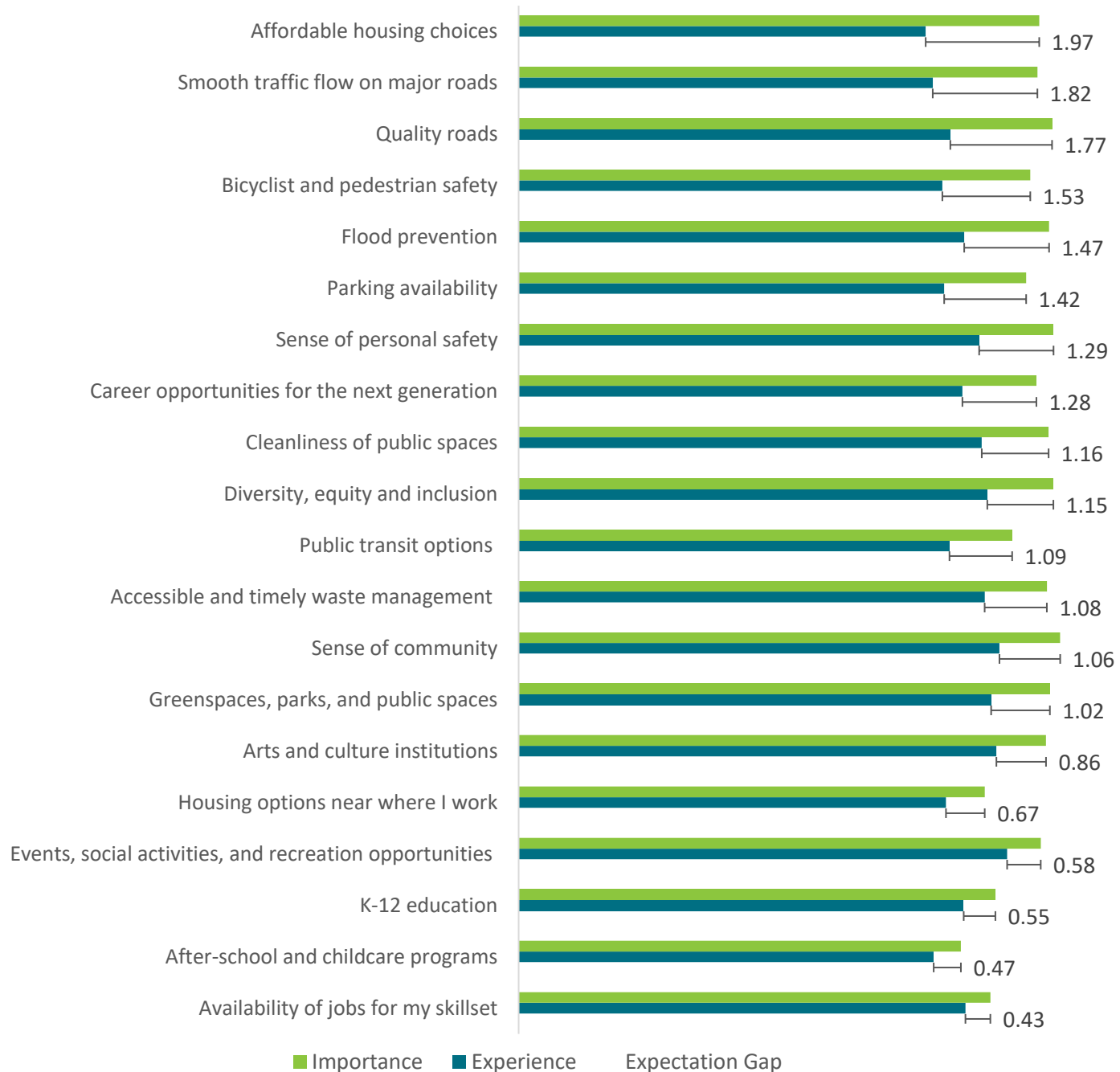
Experience

- Question Phrasing:** In your personal experience, how has the City of Tampa delivered on these characteristics?
- The **average** score is **7.76** among all categories

Expectation Gap

- Calculated as *(Importance – Experience)*
- A higher expectation gap is a bad thing
- The **average** expectation gap is **1.13**

2024 Expectation Gaps



Study Regions

Of the top six expectation gaps, four pertained to transportation:

- Smooth traffic flow on major roads
- Quality roads
- Bicyclist and pedestrian safety
- Parking availability

Top Five Expectations Over Time

Despite the importance of transportation issues, housing affordability, which was not a top issue as recently as 2020, has been the number one expectation for the last two years.

2020	2021	2022	2023	2024
Smooth traffic flow on major roads	Smooth traffic flow on major roads	Affordable housing choices	Affordable housing choices	Affordable housing choices
Bicyclist and pedestrian safety	Quality roads	Smooth traffic flow on major roads	Smooth traffic flow on major roads	Smooth traffic flow on major roads
Parking availability	Affordable housing choices	Quality roads	Quality roads	Quality roads
Flood prevention	Flood prevention	Parking availability	Parking availability	Bicyclist and pedestrian safety
Cleanliness of public spaces	Parking availability	Accessible and timely waste management	Flood prevention	Flood prevention

Top Five Expectations Over Time

The importance of housing affordability, traffic flow, and quality roads cuts across the entire city. However, beyond that, interesting neighborhood-level distinctions emerge.

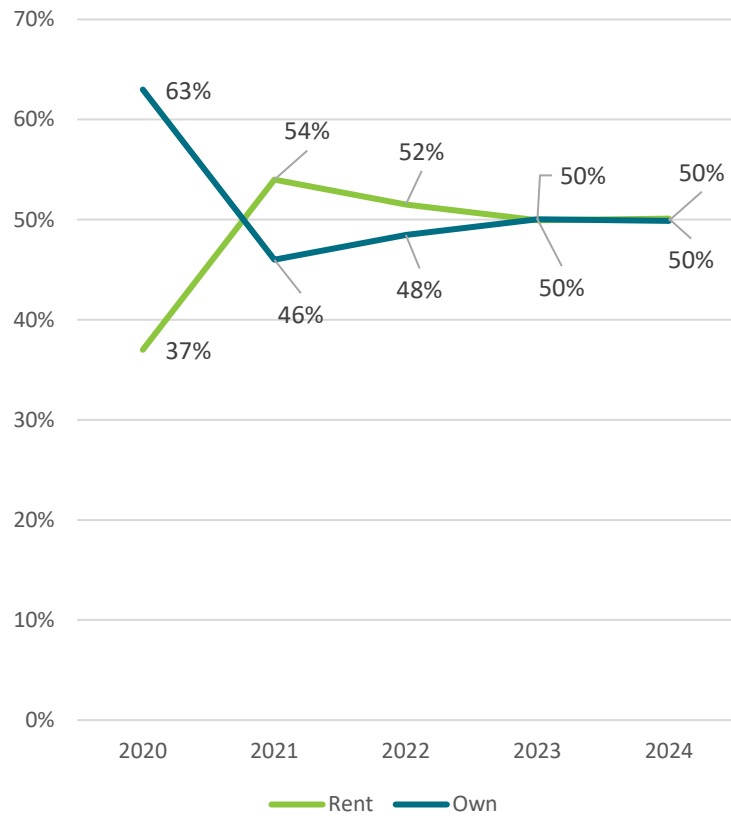
	South Tampa	Downtown/ Channelside/ Harbour Island	East Tampa/ Ybor/Heights	University/Sulphur Springs	West Tampa South	New Tampa
1	Affordable housing choices	Affordable housing choices	Affordable housing choices	Smooth traffic flow on major roads	Smooth traffic flow on major roads	Affordable housing choices
2	Quality roads	Quality roads	Smooth traffic flow on major roads	Affordable housing choices	Quality roads	Bicyclist and pedestrian safety
3	Smooth traffic flow on major roads	Flood prevention	Quality roads	Flood prevention	Bicyclist and pedestrian safety	Quality roads

The background of the slide is an abstract composition of various geometric shapes, including triangles, squares, and polygons, in shades of blue, teal, and green. The shapes are layered and overlapping, creating a dynamic and modern visual effect. The central text is set against a white horizontal band.

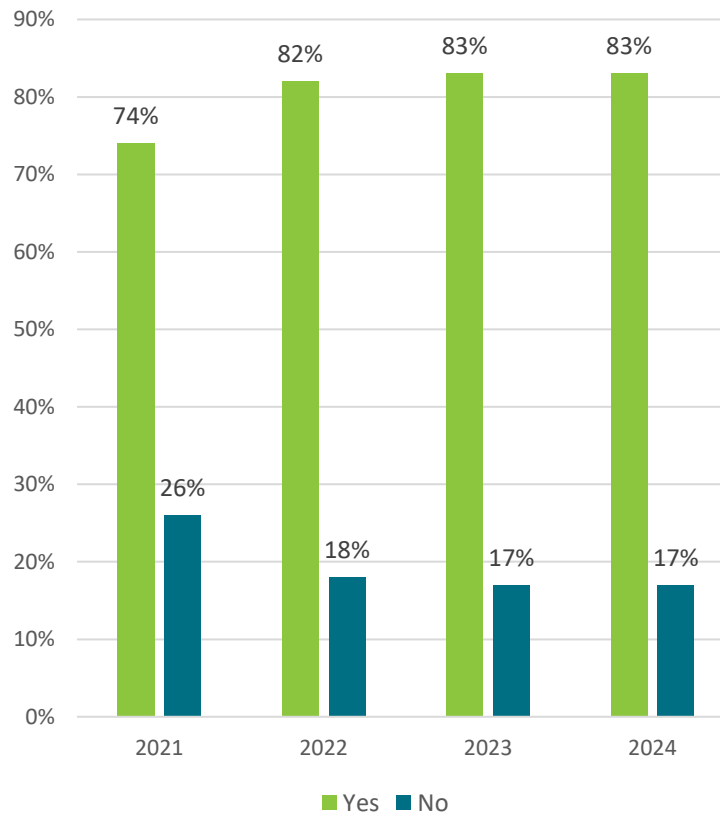
City Initiatives

Housing

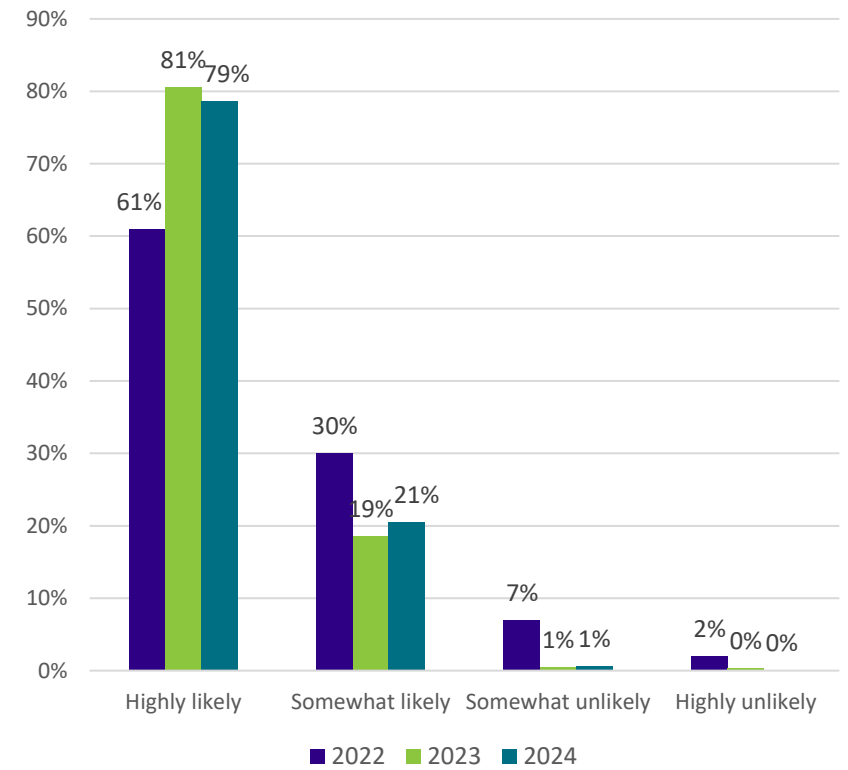
Trend: Do you rent or own your current City of Tampa residence?



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

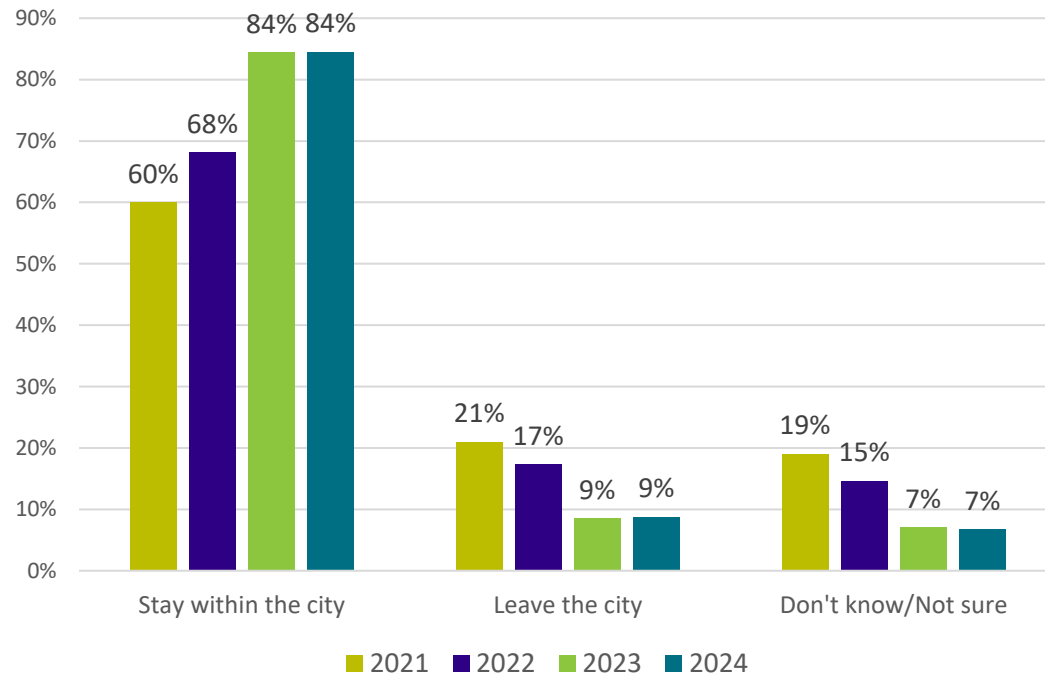


Trend: If you had to guess, how likely is it that you will be living in the City of Tampa in five years from now?

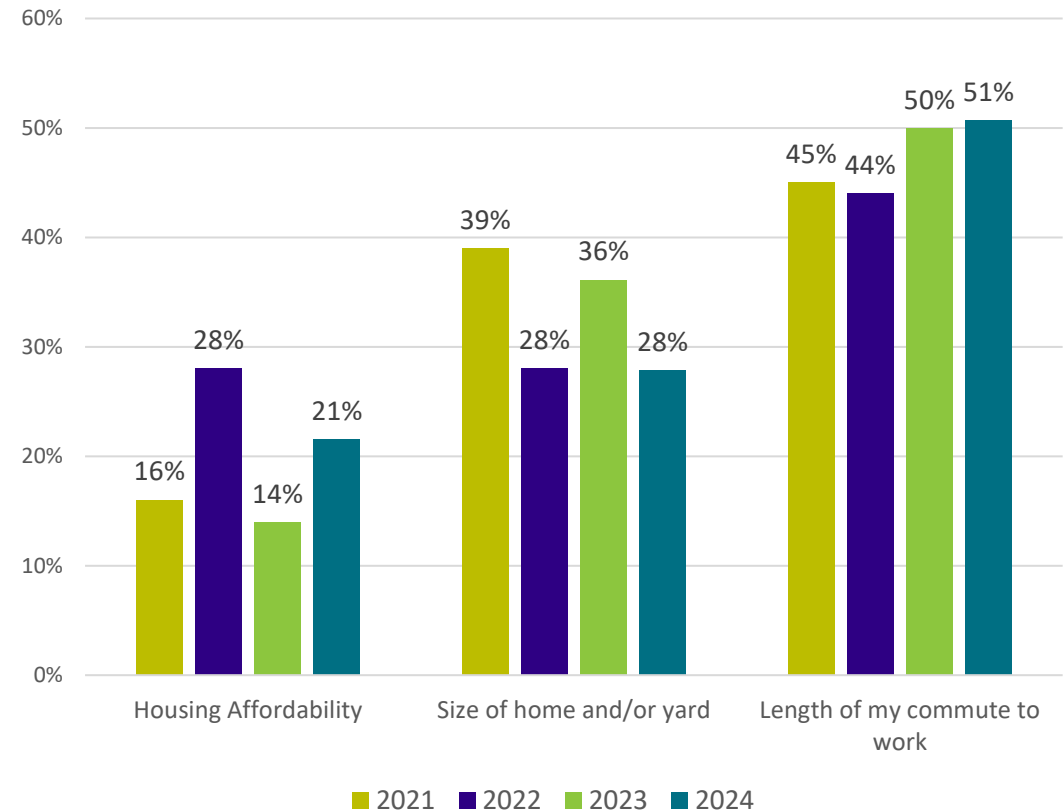


Housing

To those who 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?

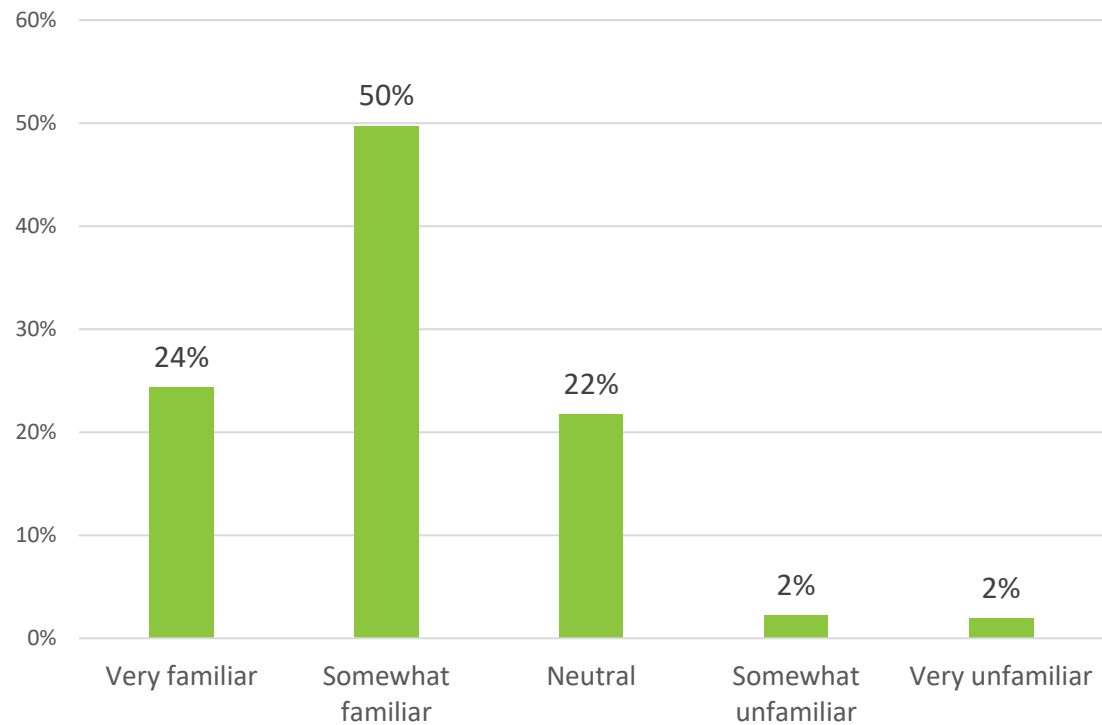


Trend: Which of the following is least important to you when considering your choice of where to live?

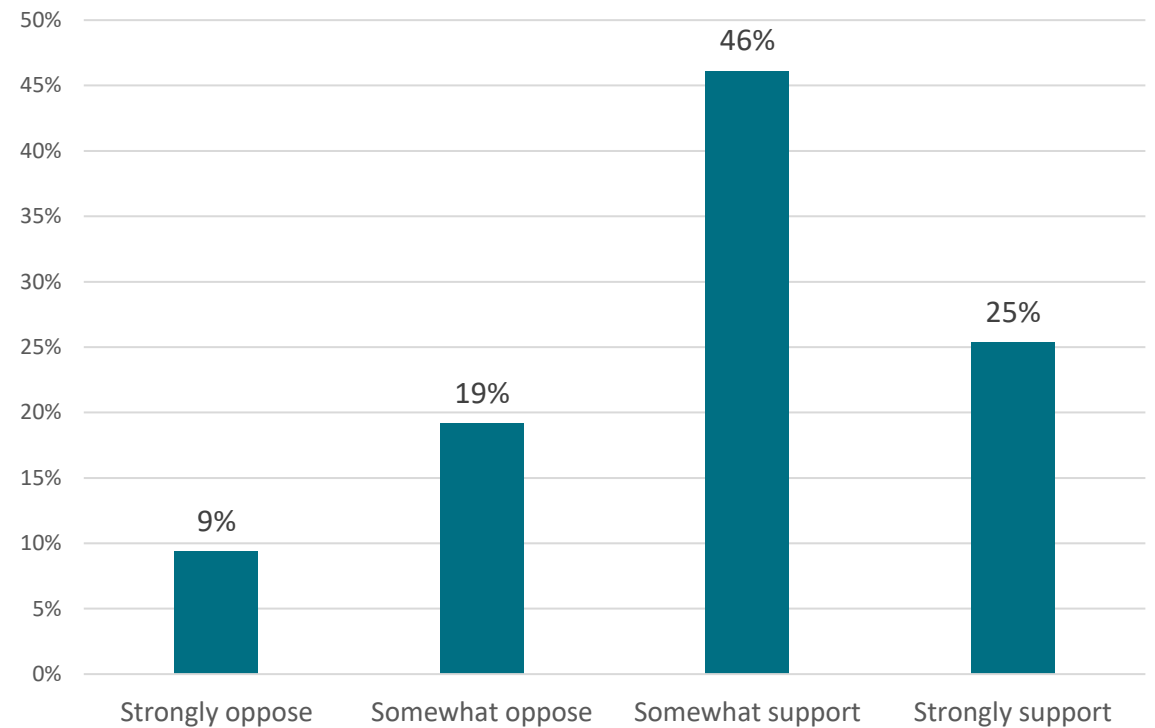


Housing: Accessory Dwelling Units

How familiar are you with the concept of accessory dwelling units (ADUs) such as garage apartments or mother-in-law suites?

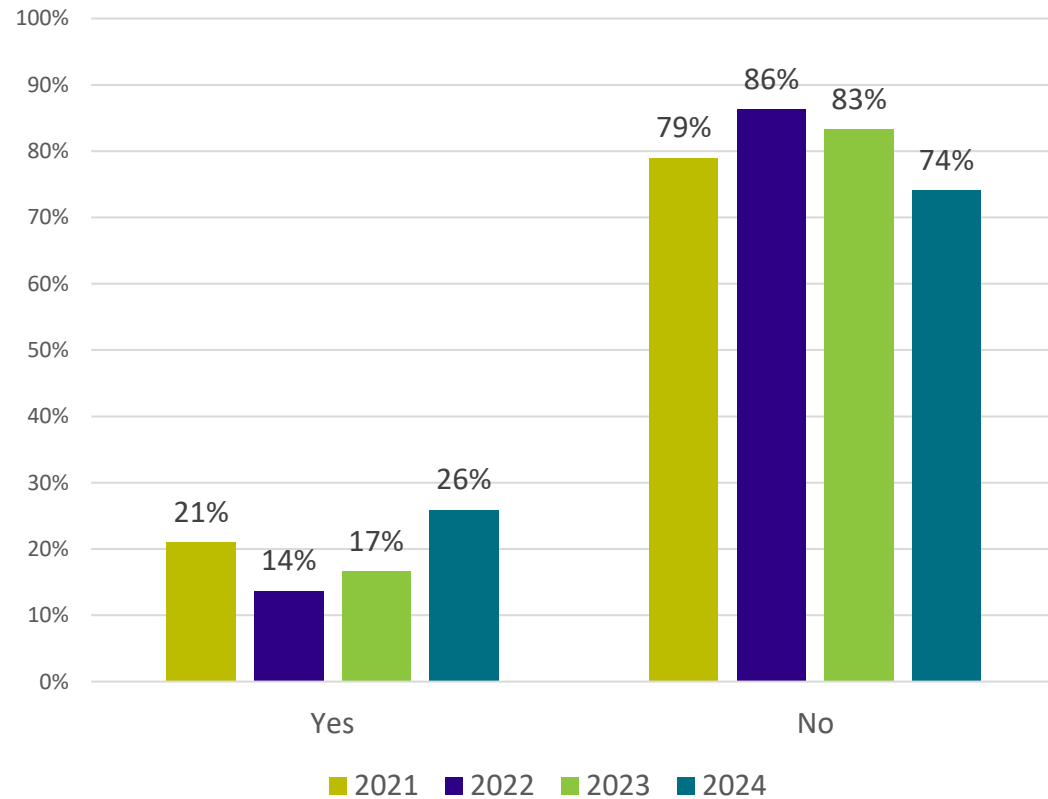


Do you support or oppose allowing people to construct or convert their properties to have an ADU in your neighborhood?

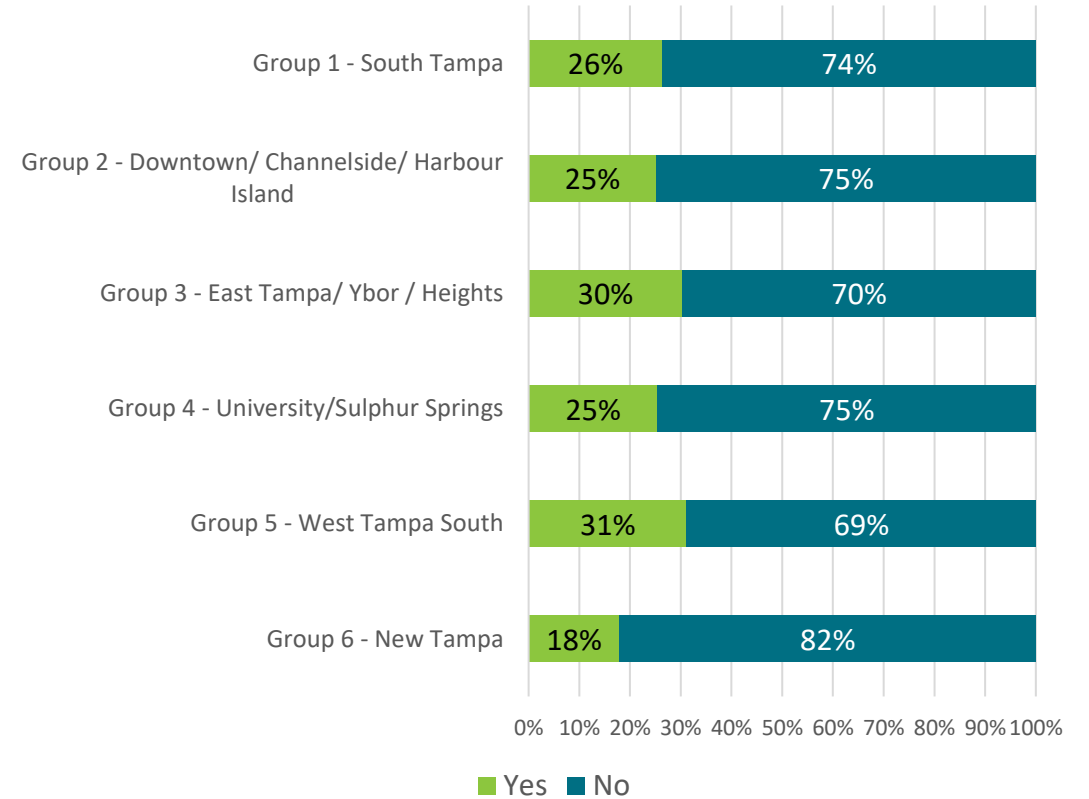


Transportation (Cont.)

Do you regularly walk to run errands, visit businesses, or commute to work?

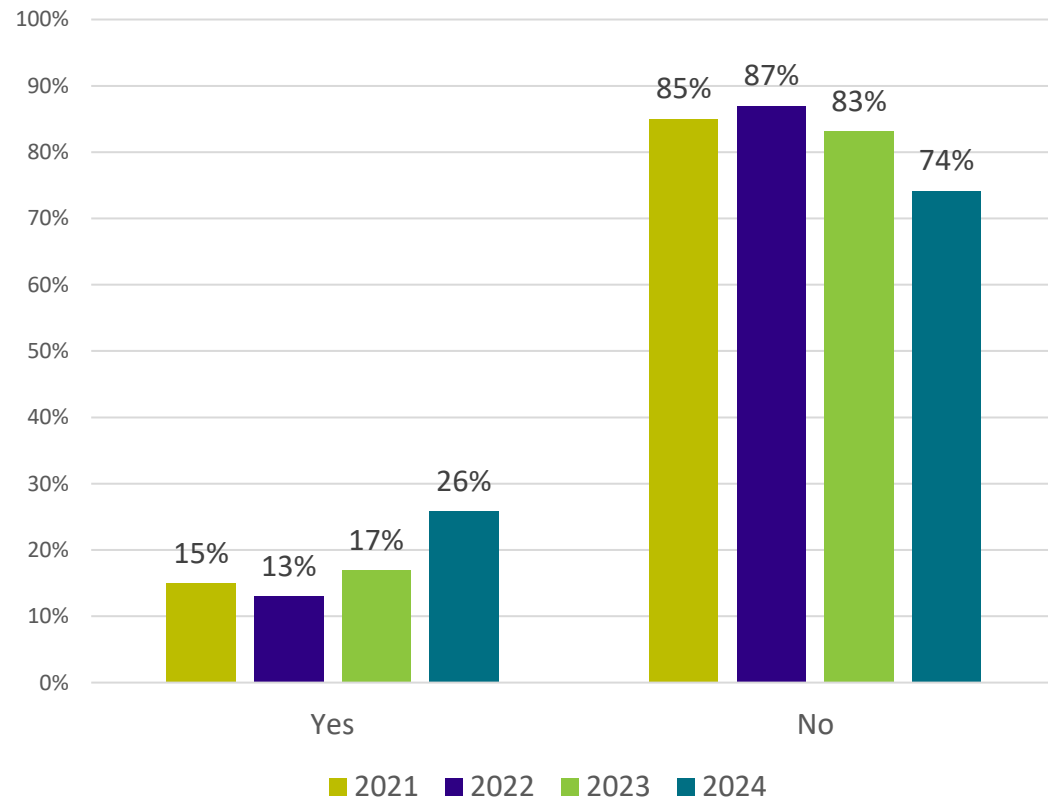


Do you regularly walk to run errands, visit businesses, or commute to work?: By Geography

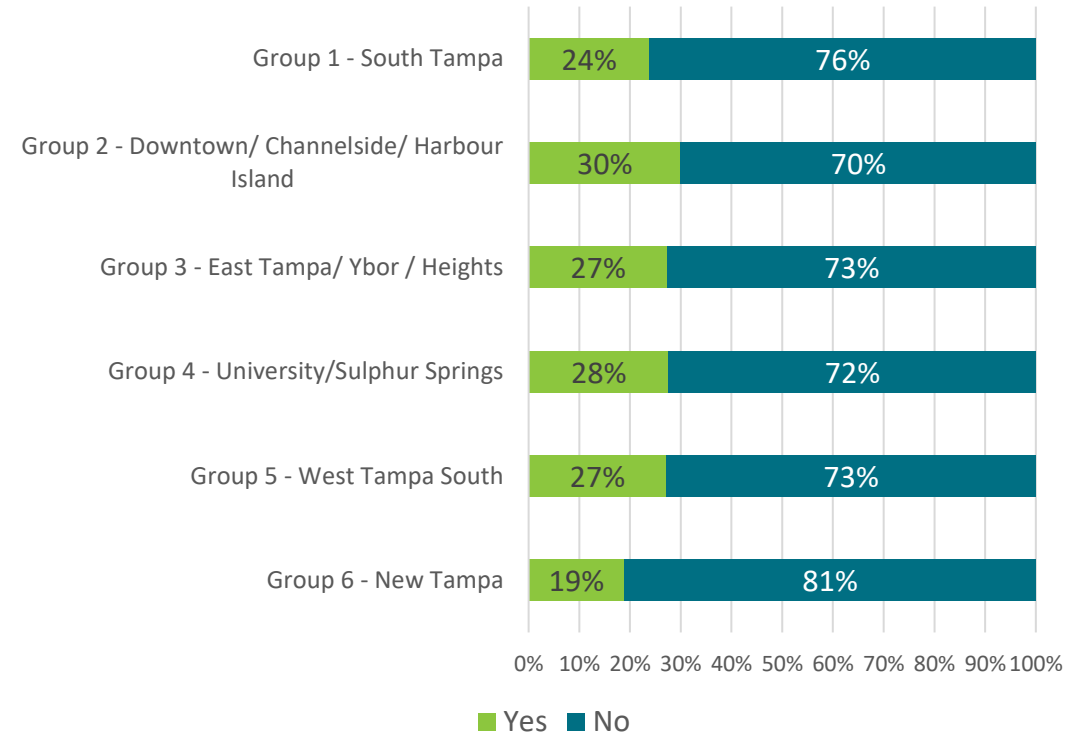


Transportation (Cont.)

Do you regularly bike or scoot to run errands, visit businesses, or commute to work?

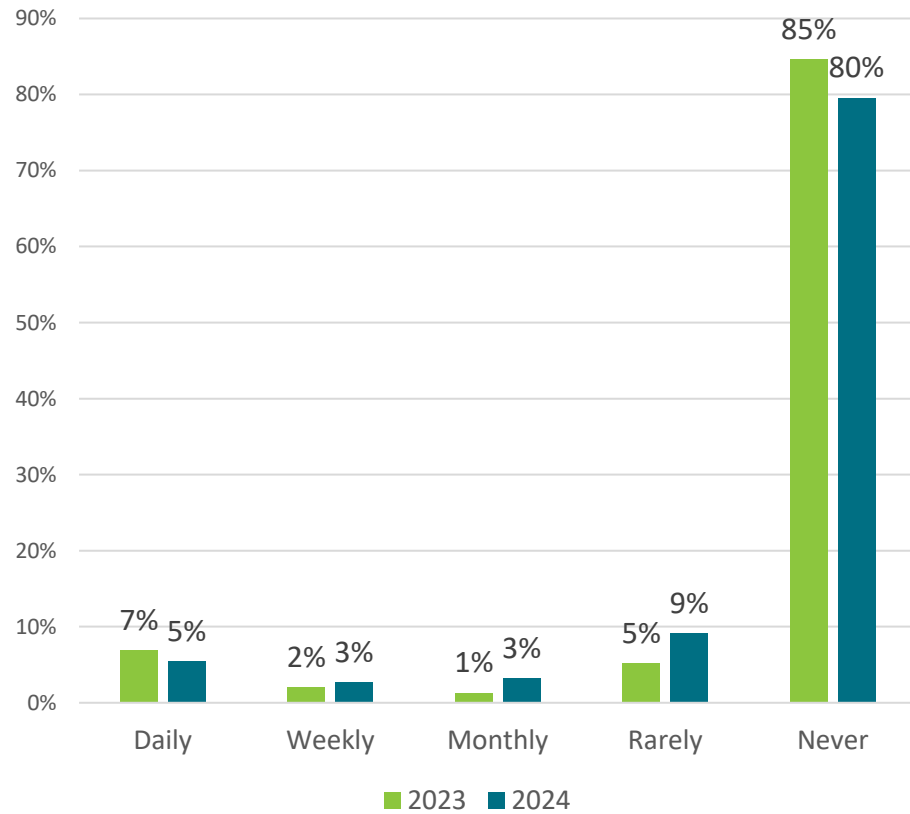


Do you regularly bike or scoot to run errands, visit businesses, or commute to work?: By Geography

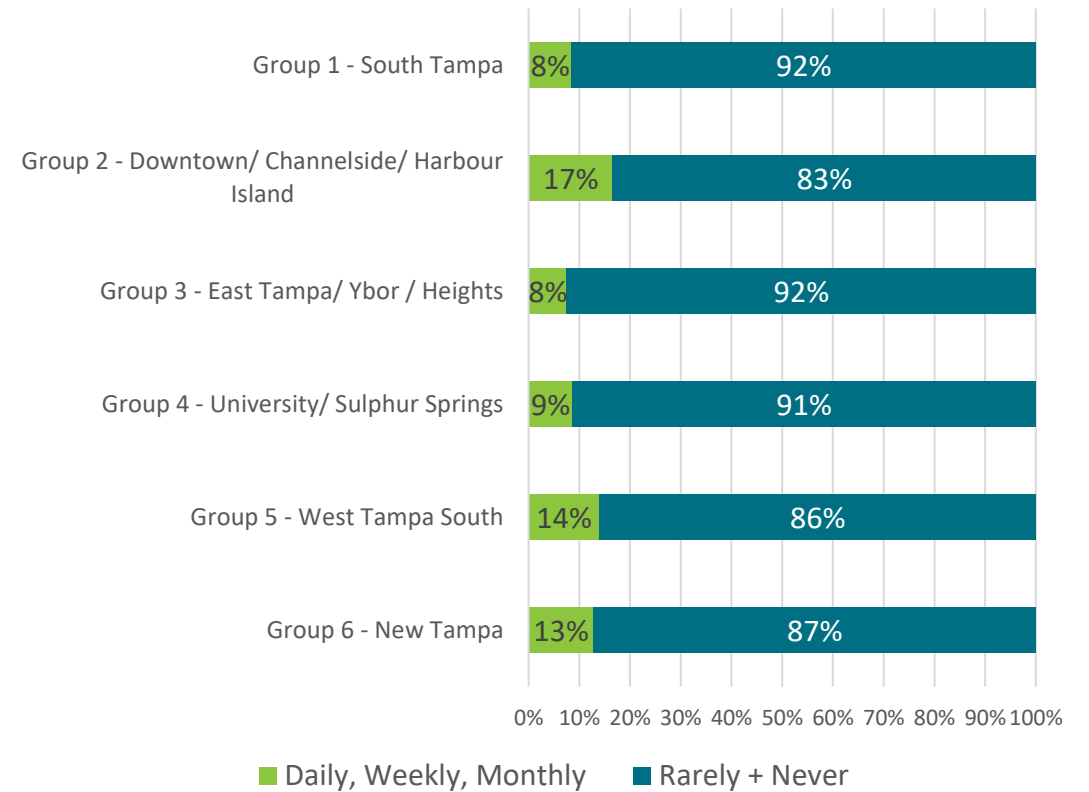


Transportation

How often do you use public transportation in Tampa, including buses and streetcars?

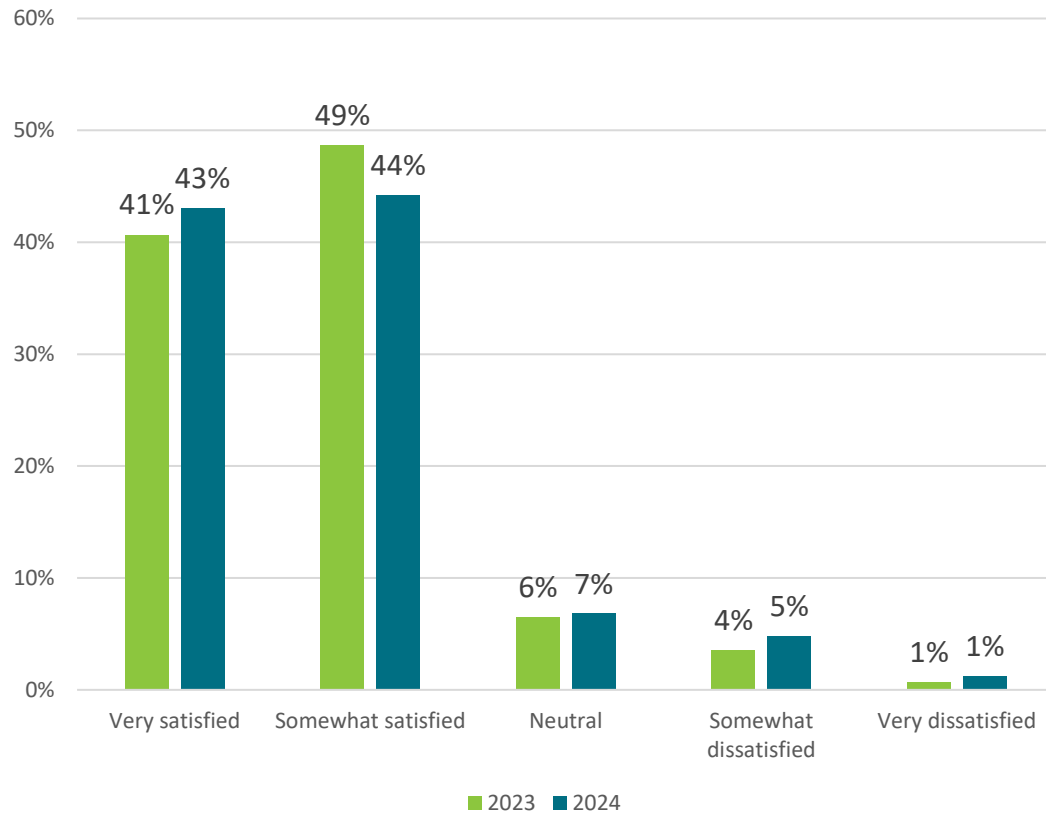


Do you use public transportation in Tampa, including buses and streetcars?: By Geography

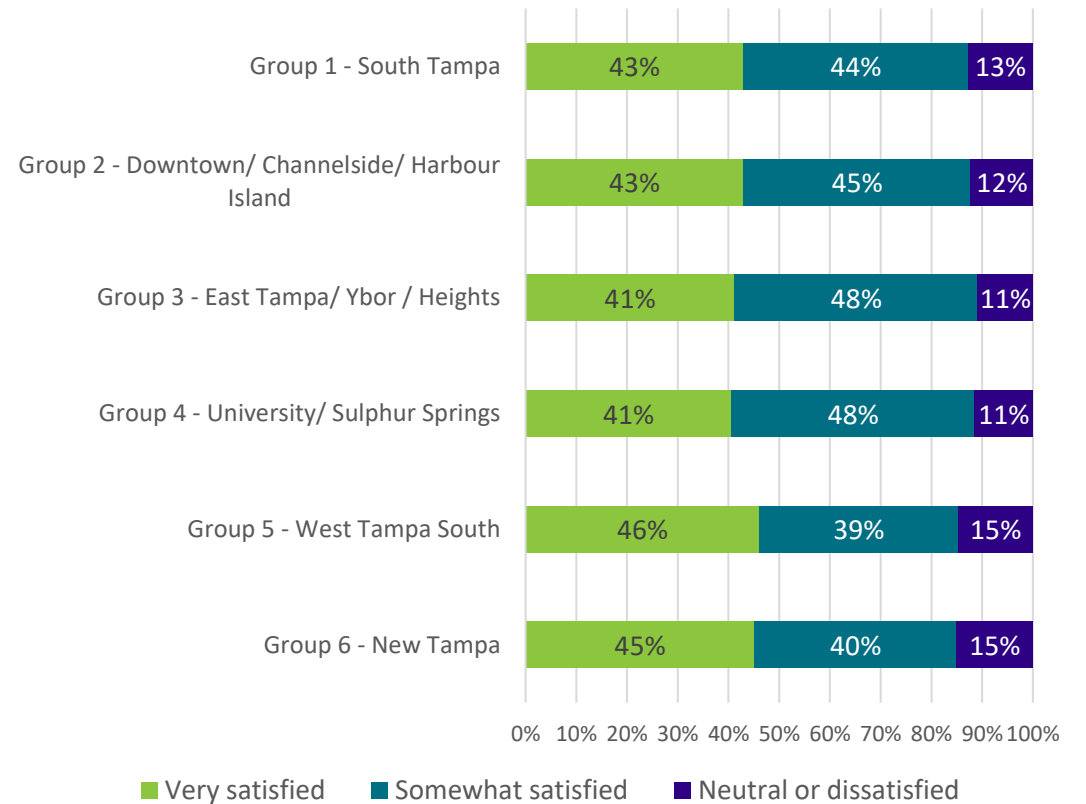


Transportation (Cont.)

How satisfied are you with the current state of streets and roads in the City of Tampa?



How satisfied are you with the current state of streets and roads in the City of Tampa?: By Geography



Walking/Biking Improvements

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

	2024	2023	2022	2021 Walk	2021 Bike
Don't know	44%	52%	36%	45%	53%
Improved Bike Lanes/Sidewalks	17%	6%	6%	6%	13%
More Bike Lanes/Sidewalks	8%	3%	3%	6%	4%
Less Traffic	8%	13%	26%	9%	7%
Nothing	5%	8%	9%	8%	6%
More Traffic Enforcement	3%	2%	5%	10%	9%
Improved Personal Safety*	3%	5%	2%	4%	1%
Better/More Lighting*	2%	1%	1%	1%	1%
Education campaigns	2%	1%	-	-	-
Beautification	2%	-	-	-	-
Other	2%	1%	2%	2%	2%
Incentives	2%	5%	2%	1%	0%
Walking/Biking oriented design	2%	2%	0%	2%	1%
More Shade	1%	1%	2%	5%	1%
Improved Parking	0.3%	0.0%	1.8%	0.0%	0.0%
Improve Overcrowdedness	0.0%	0.3%	3.7%	0.0%	0.0%

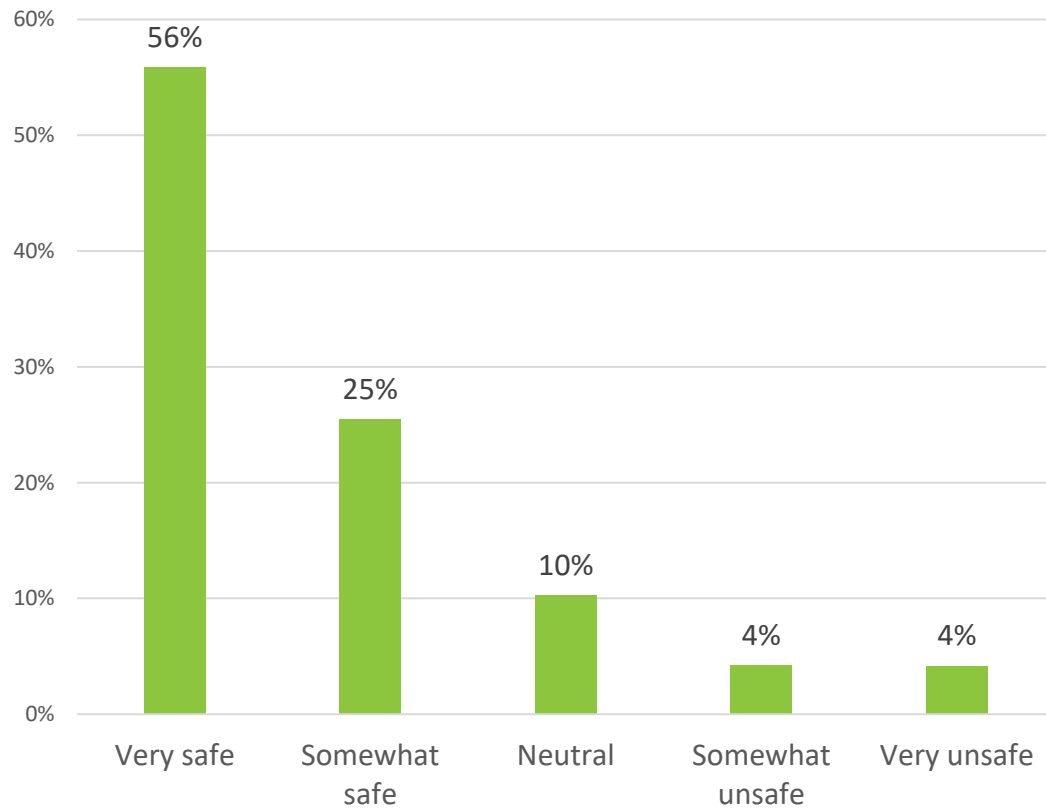
Public Transportation Improvements

What improvements or changes could be made to public transportation services in Tampa to make them more convenient and appealing to you?

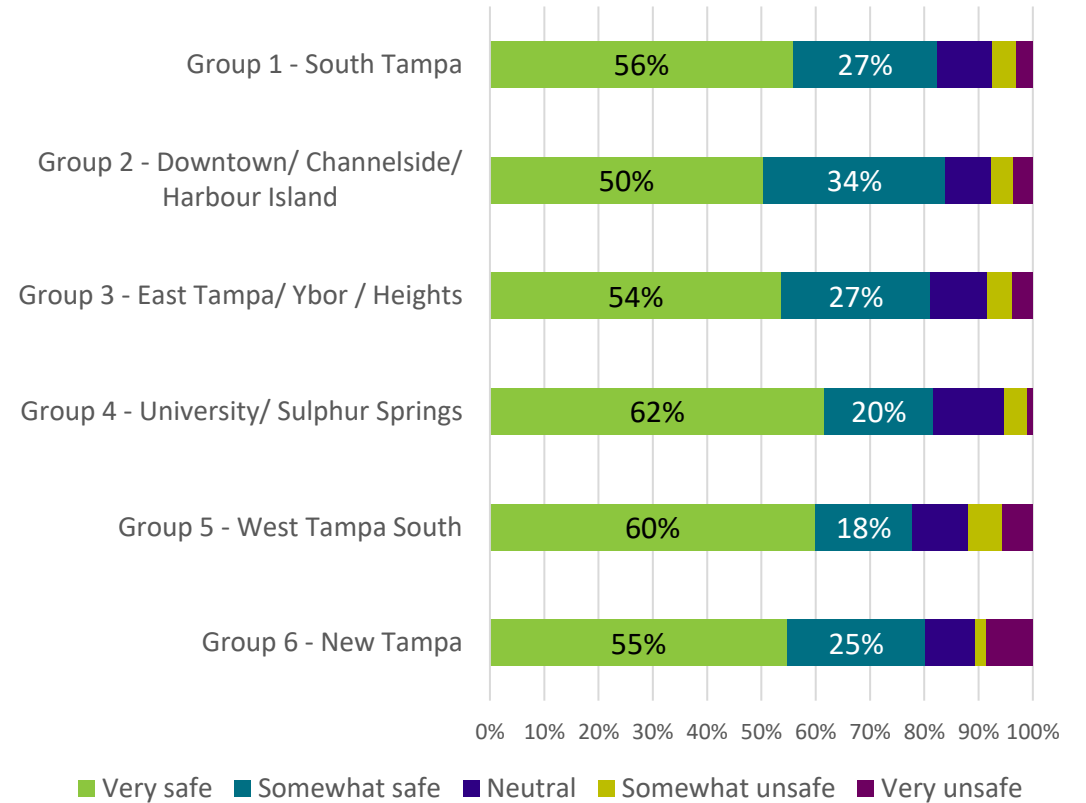
	2023	2024
Don't know /Unsure	52.2%	41.1%
Nothing	25.4%	30.7%
Improved frequency/reach	3.9%	12.9%
More/Improved Bus Stops	1.8%	3.4%
New/Improved Buses	0.3%	2.4%
Improved Roads/Infrastructure	0.8%	2.1%
Improved cleanliness	3.0%	1.6%
Happy with current service	1.8%	1.1%
Improved Safety	1.5%	1.1%
Other	2.5%	1.0%
Timeliness	1.3%	1.0%
Improved access	1.9%	0.9%
Have a car	0.6%	0.7%
Improved costs	1.2%	0.4%
Incentives	1.0%	0.0%
Access for disabled	0.6%	0.0%

Bicycle and Pedestrian Safety

How safe do you feel when walking or riding a bike in the City of Tampa?

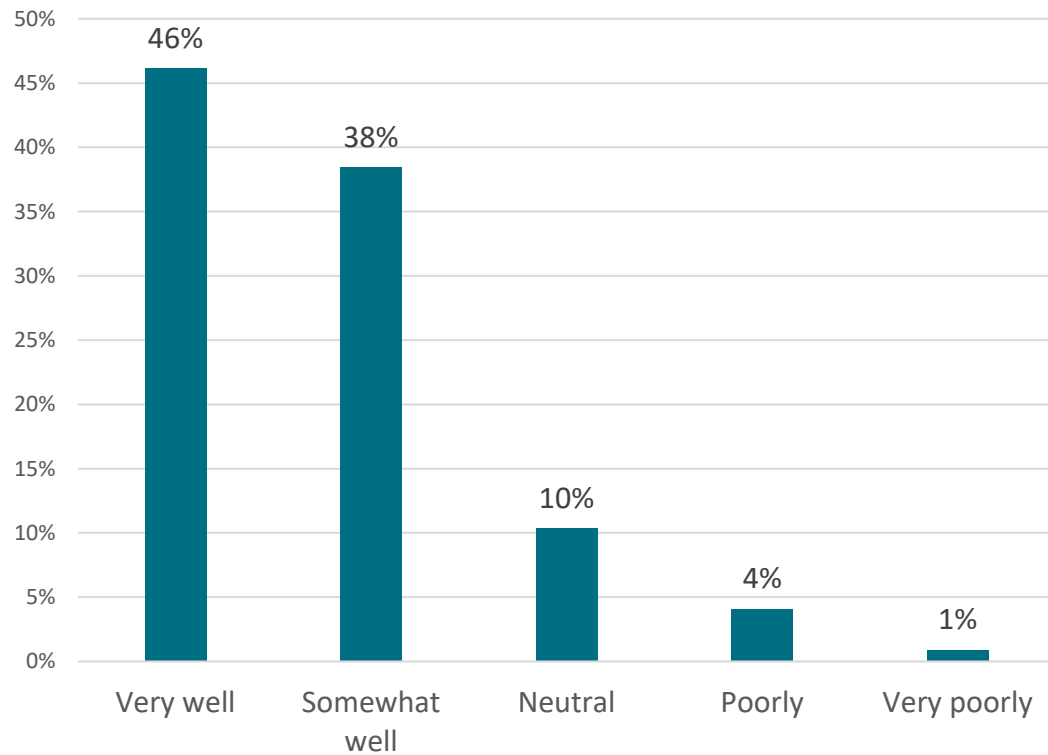


How safe do you feel when walking or riding a bike in the City of Tampa?: By Geography

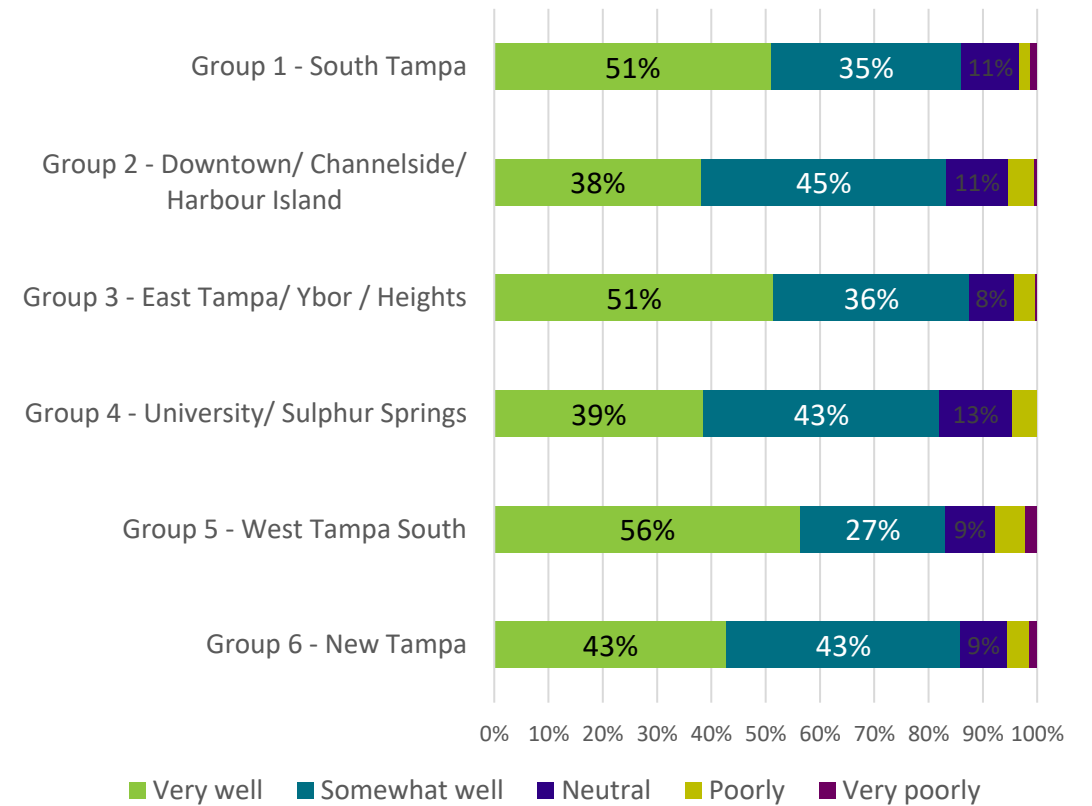


Bicycle and Pedestrian Safety

How well do you believe traffic laws (such as stopping at red lights, avoiding illegal U-turns, etc.) are being enforced in the City of Tampa?

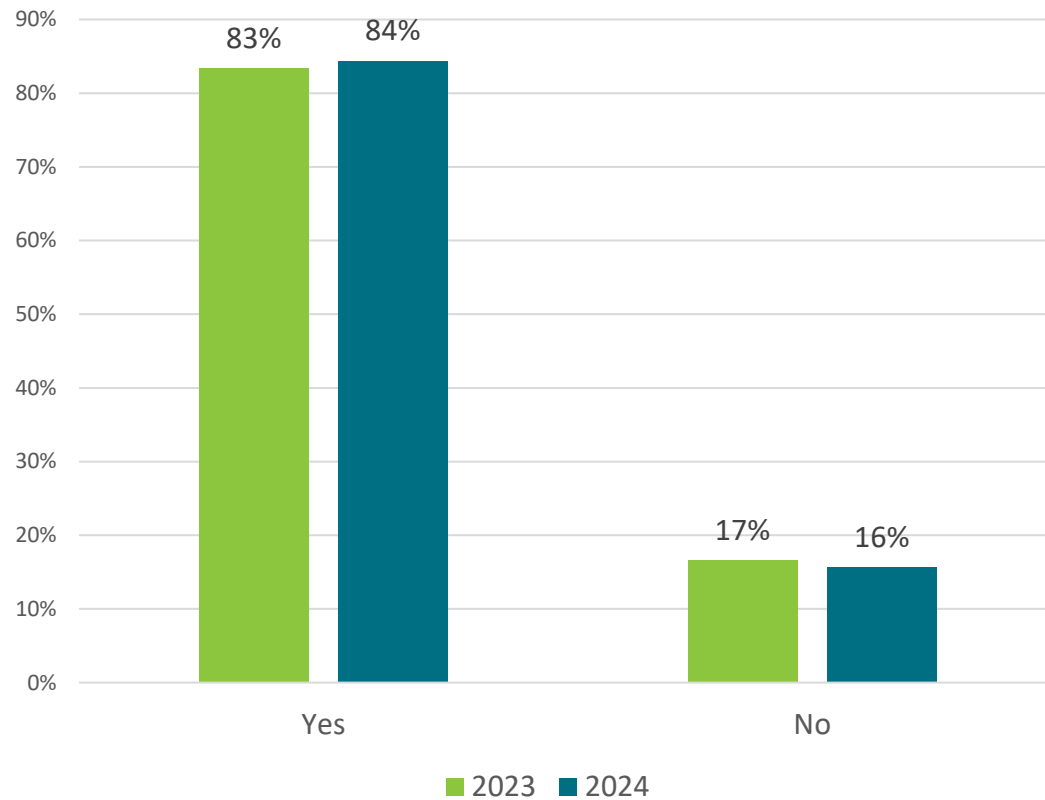


How well do you believe traffic laws are being enforced in the City of Tampa?: By Geography

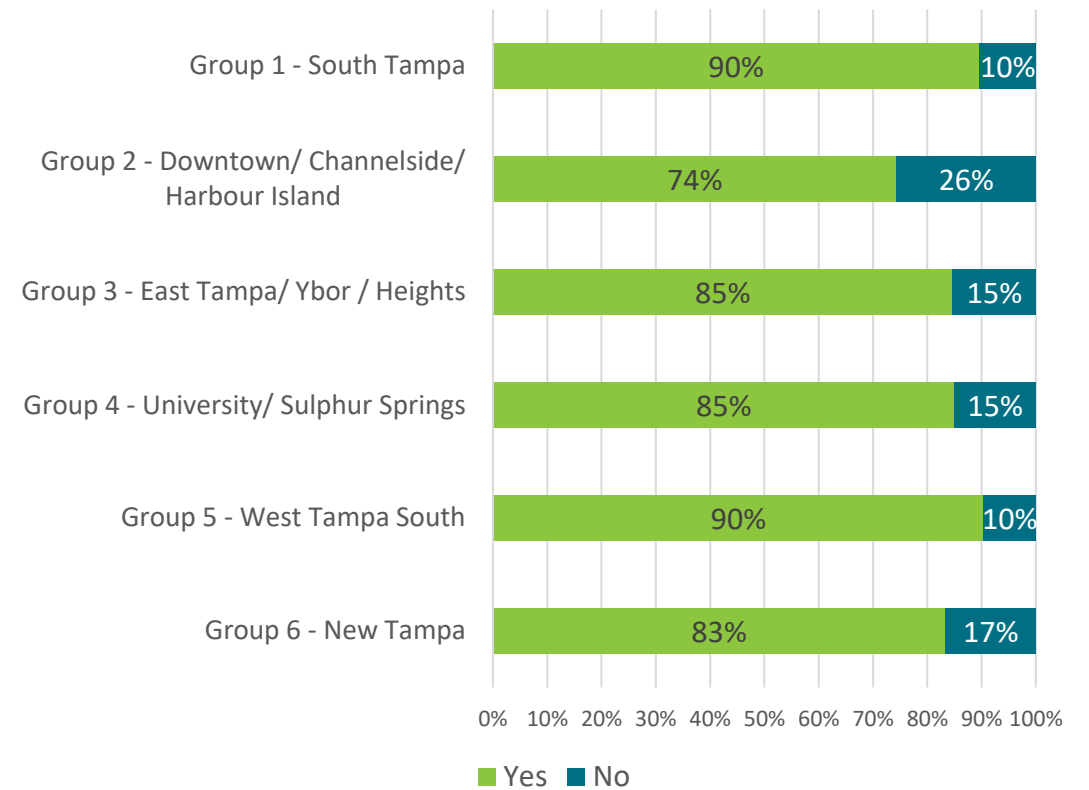


Neighborhood Parks

Can you recall the name of the park closest to your residence?

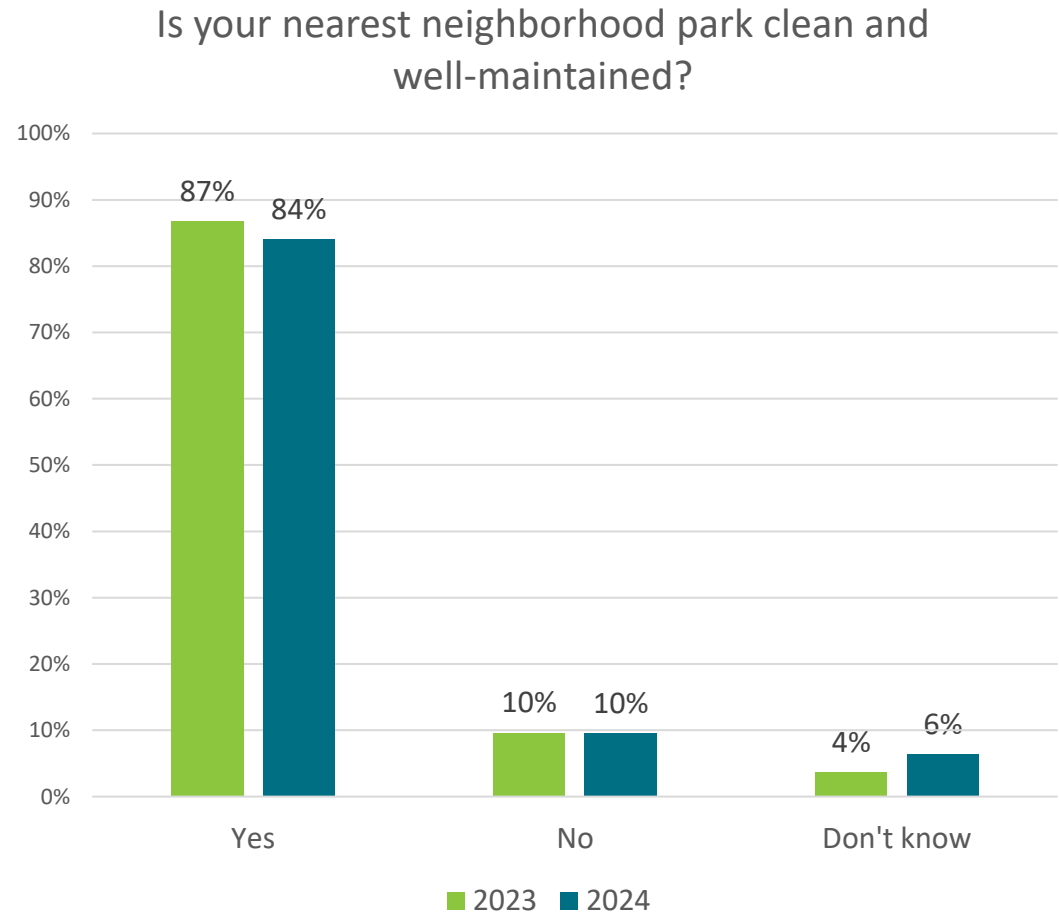


Can you recall the name of the park closest to your residence?: By Geography



Neighborhood Parks

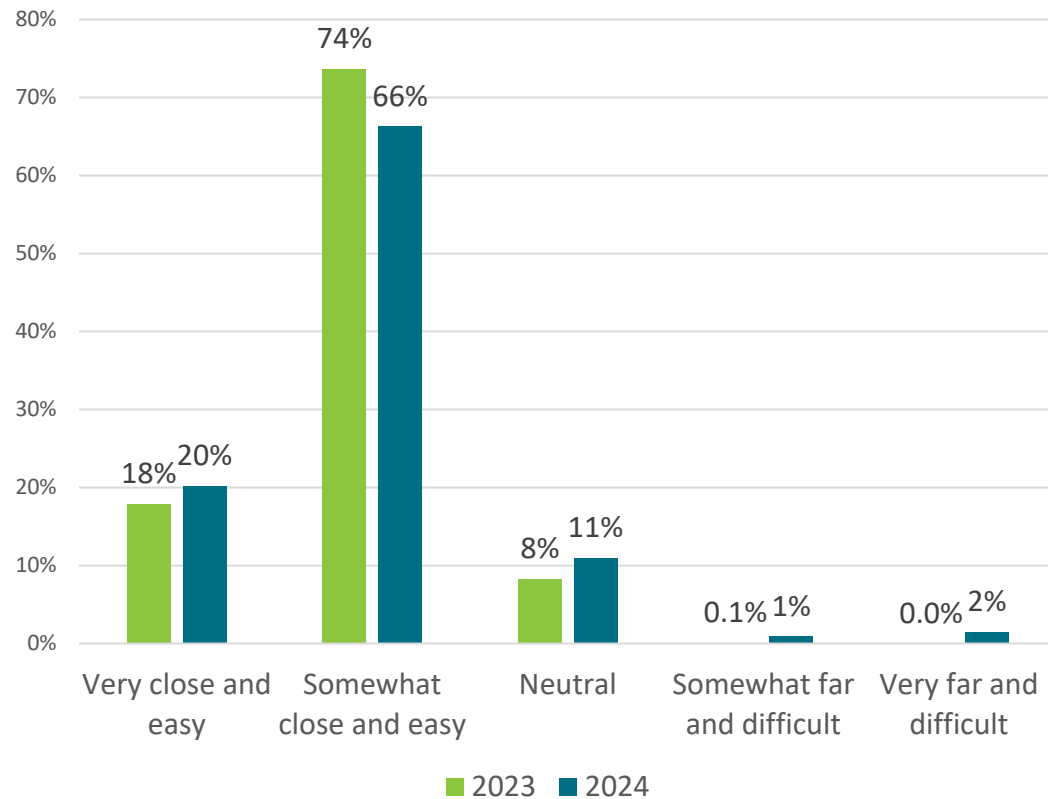
Nearest Park: Top 10 by Frequency of Mention	
Rowlett Park	6.9%
Compton Park	5.0%
Curtis Hixon Waterfront Park	4.7%
Cypress Point Park	4.6%
Ballast Point Park	4.3%
Tampa Riverwalk	4.1%
Lowry Park	3.8%
Flatwoods Park	3.7%
Lettuce Lake Park	3.6%
Rivercrest Park	3.3%



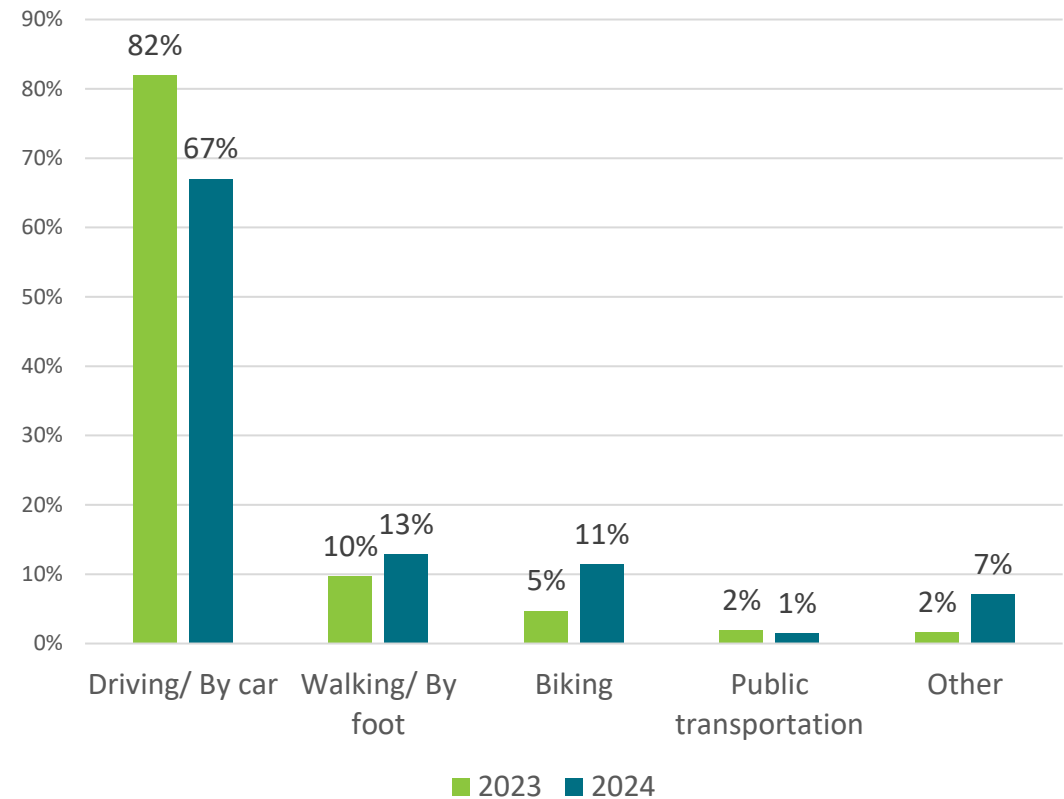
**Includes Curtis Hixon and USF Park by the Riverwalk. Most responses in this category were "Riverwalk"*

Neighborhood Parks

How close and easy is it for you to get to your nearest neighborhood park?

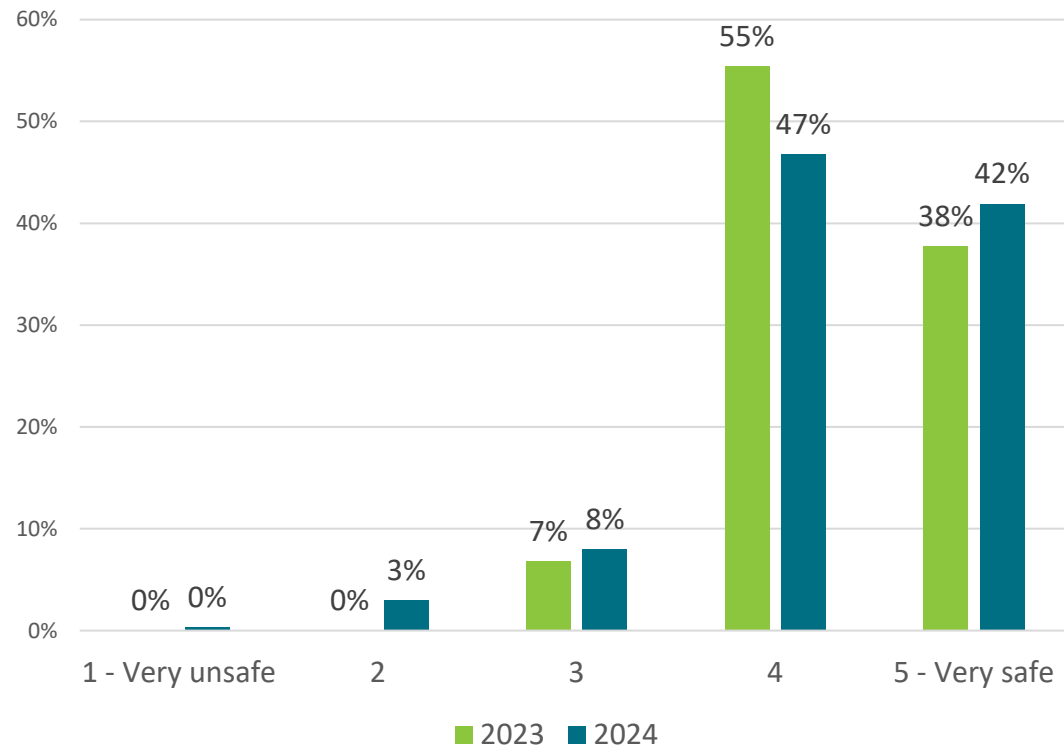


When you visit to your nearest neighborhood park, how do you usually go there?

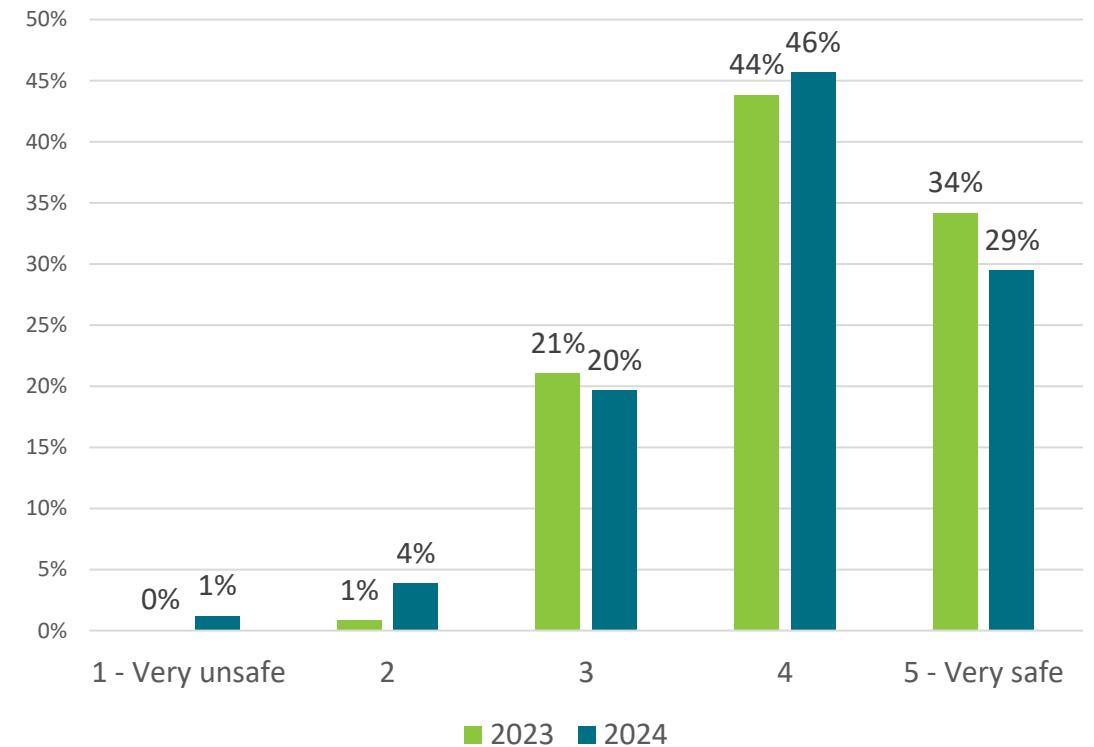


Public Safety

On a scale of 1 to 5, with 1 being "very unsafe" and 5 being "very safe," how safe do you feel in your neighborhood **during the day**?



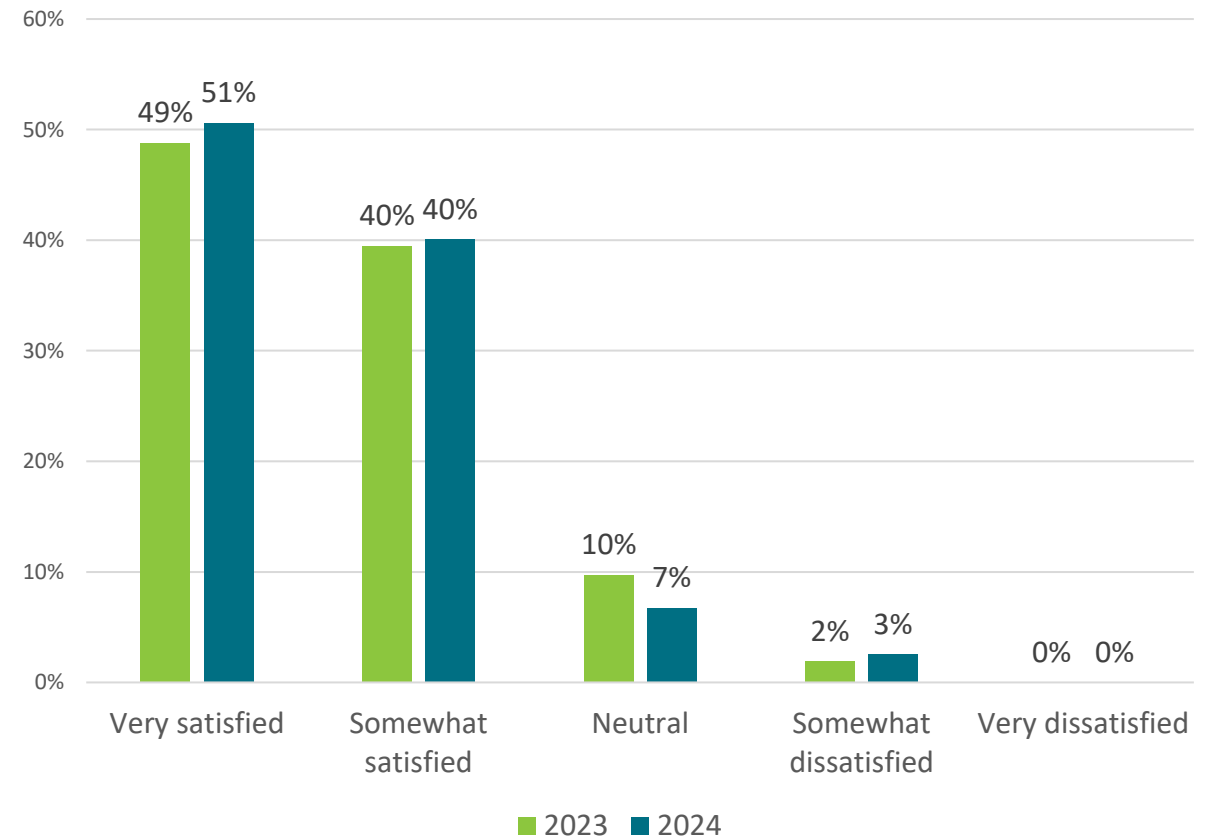
On a scale of 1 to 5, with 1 being "very unsafe" and 5 being "very safe," how safe do you feel in your neighborhood **at night**?



Public Safety

What specific safety or security concerns do you have in your neighborhood?		
	2023	2024
Nothing/Feels safe	74.3%	71.1%
Don't know	11.8%	7.0%
More streetlights	0.3%	5.9%
Larceny/Burglary/Vandalism	1.7%	3.5%
General crime	2.8%	2.8%
Desire for greater police presence/neighborhood watch	6.3%	2.6%
Drug activity	0.5%	2.6%
Speeders/Drunk Driving	1.0%	1.9%
Violent crime	0.5%	1.0%
Car Theft/Break-ins	0.4%	1.0%
Other	0.3%	0.6%
Property Damage/Upkeep	-	0.6%
Homeless	0.3%	0.5%

How satisfied are you with the local police presence and emergency response times in your neighborhood?



Conclusion

The survey results show that the residents have high levels of trust and confidence in the city government, high recommendation levels for living, working, and raising children in the city, and positive ratings for the city's handling of issues in general.

1) Affordable housing choices, 2) smooth traffic flow on major roads, and 3) quality roads remain the three areas of greatest concern among city residents.

Only a quarter of residents are "very familiar" with accessory dwelling units and most residents do not hold strong opinions on whether they want them in their neighborhood.

Residents in the Downtown area report walking and/or biking for various reasons most often, but they also reported the lowest feelings of safety of walking/biking in their neighborhood