



WESTSHORE
DISTRICT
TAMPA BAY

2025 Westshore District Resident & Worker Survey

Development Forum Highlights

Presented by Robert Allen, Vice President · HCP Associates

On behalf of the Westshore Alliance



Research | Strategy | Marketing



ABOUT US

HCP Associates

Research · Strategy · Marketing

- Tampa-based research, strategy, and communications firm, founded in **1986**.
- Have consulted cities, counties, destination management organizations, CRAs and much more across Tampa Bay
- Westshore Alliance's **research partner since the 2017 baseline study**.
- Six iterations of the Resident & Worker Survey across roughly 13 years; longitudinal continuity allows the Alliance to tell a long-range story.

YOUR PRESENTER

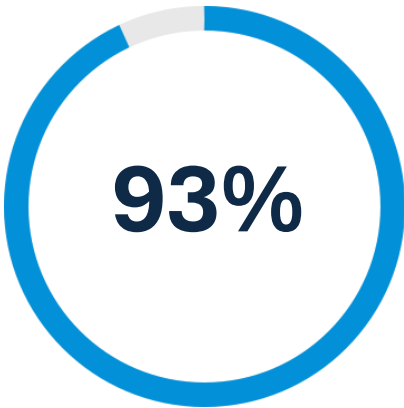
Robert Allen

Vice President, HCP Associates

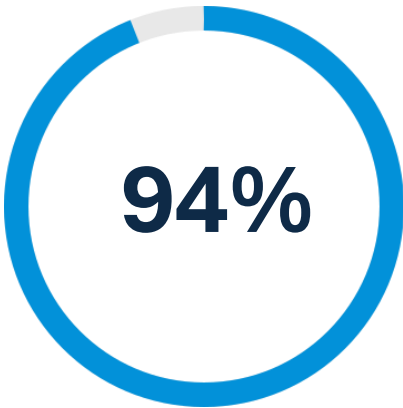
- Leads HCP's **research and operations practice** and the firm's Westshore Alliance engagement.
- Background in **economics** (University of Florida) and enterprise data systems.
- Study lead on **every wave** of this study since 2019.

Westshore Has Earned Its Audience

After six waves of research across thirteen years, residents and workers continue to **recommend the District** at near-universal rates, and demand to live here keeps climbing.



of **workers** would be likely to recommend Westshore as a place to work



of **residents** would be likely to recommend Westshore as a place to live



of **workers** say they're interested in moving into the District in the next five years; up from **34% in 2017**

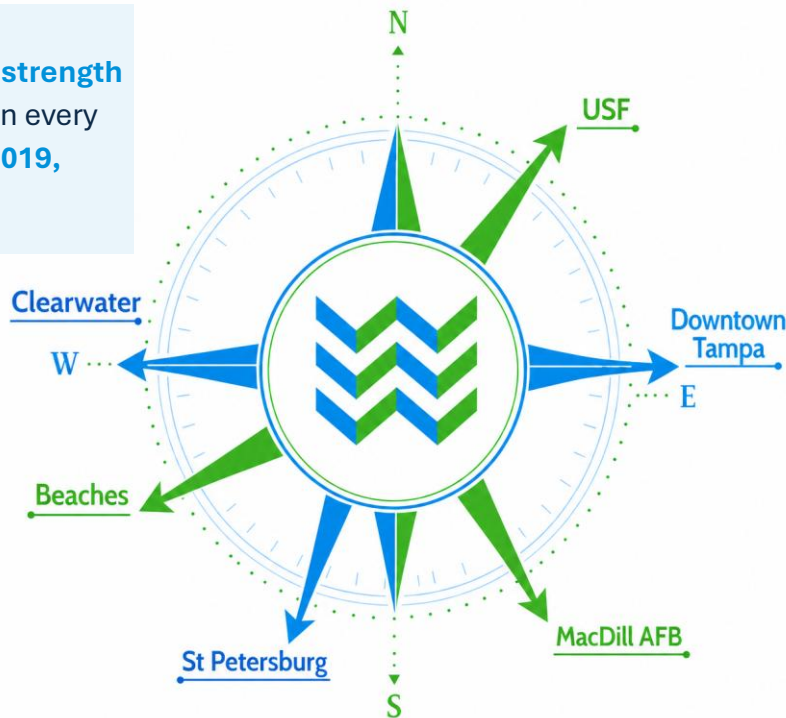
The 16-point jump in worker interest in living in Westshore shows that the District's perception as an exciting place to live is only improving.

Location Is the District's Defining Strength

Location has been the **#1 cited strength** for both residents and workers in every iteration of this study — **2017, 2019, 2021, 2023, 2025.**

52% of residents cite "central location" as a motivating factor to live in Westshore

38% of workers cite "central location" as a motivating factor to work in Westshore



58%

of **workers** cite Westshore's location and access to other areas as the District's **greatest strength**

63%

of **residents** cite Westshore's location and access to other areas as the District's **greatest strength**

Traffic Has Always Been the Top Friction — and the Gap Is Re-Opening

37%

of **residents** say traffic / infrastructure is the most important area for improvement

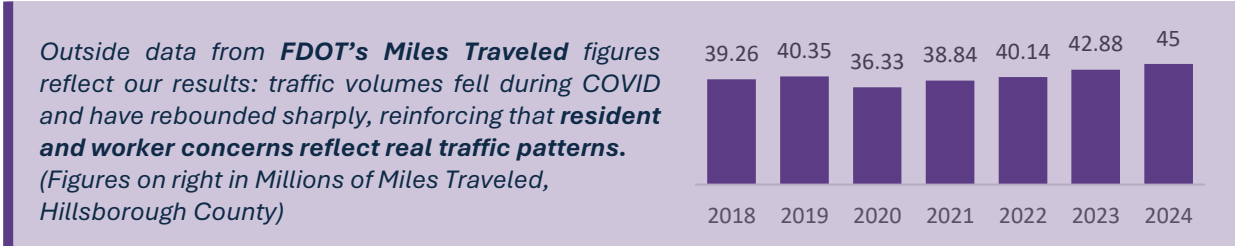
45%

of **workers** say traffic / infrastructure is the most important area for improvement

TOP TRAFFIC EXPECTATION GAPS SINCE 2017 (Note: Lower is BETTER)

Audience / Top Traffic Gap	2017	2019	2021	2023	2025
Workers: Traffic flow in/out	4.17	4.41	2.69	2.82	3.72
Workers: Traffic circulation	3.93	4.19	2.69	2.75	3.53
Residents: Traffic flow in/out	2.38	3.16	2.14	2.10	2.62
Residents: Traffic circulation	2.19	3.09	2.13	1.94	2.64

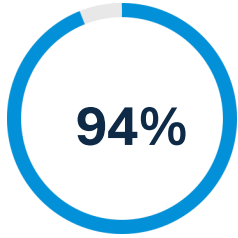
Traffic gaps spiked in 2019, dipped during the 2021 pandemic, and have rebounded sharply — **worker traffic flow expectations are now the highest in a decade.**



A Car-Centric District (For now)

The same residents and workers reporting traffic friction also rely almost entirely on a personal car to move through the District. **Currently, The road network is the system.**

DRIVE-ALONE RATE · WORKERS



of **workers** drive alone to work in the Westshore District

PERSONAL CAR · PRIMARY MODE

89%

RESIDENTS

84%

WORKERS

say a personal car is their **primary mode** of getting around the District

DAILY / MULTI-DAILY USE

83%

RESIDENTS

78%

WORKERS

use a personal car **daily or several times a day** within the District

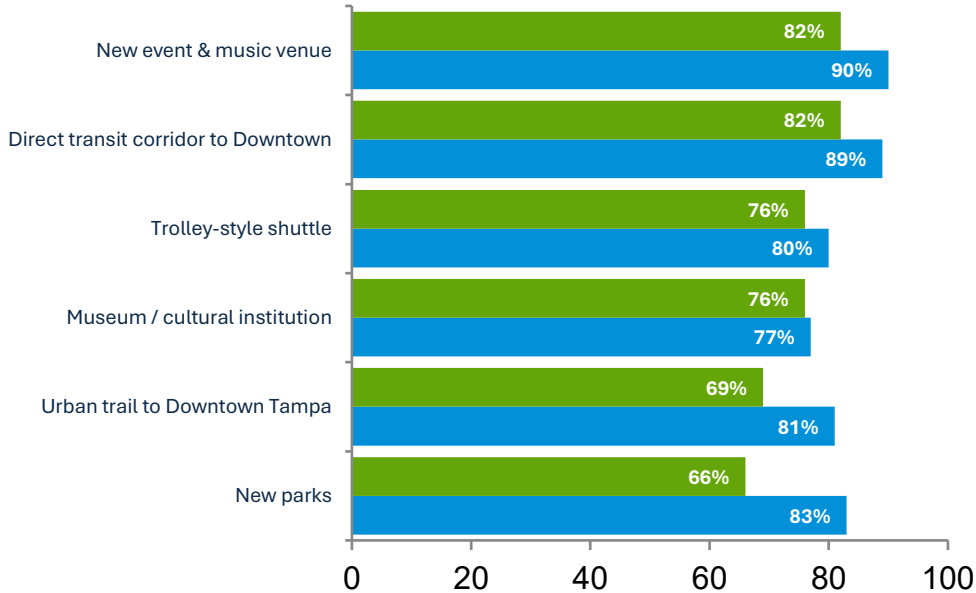
The District's most active users of the existing road system are also the users most frustrated with it; **and the most willing to switch.**

Demand for New Amenities Surged from 2023 to 2025

LIKELY + HIGHLY LIKELY TO PARTICIPATE / UTILIZE

RESIDENTS

WORKERS



89%

of **residents** would use a dedicated transit corridor between Downtown Tampa and Westshore

82%

of **workers** would use a dedicated transit corridor between Downtown Tampa and Westshore

90%

of **residents** would use a new event and music venue in the District (workers: 82%)

↑ FROM 79% IN 2021 • 83% IN 2023

Demand rose across nearly every category we tested between 2023 and 2025.

What the District Is Telling Us

CENTRAL LOCATION

A Permanent Advantage

Westshore's regional position is a permanent advantage — the **#1 cited strength** across all five waves of the study.

2017 · 2019 · 2021 · 2023 · 2025

TRAFFIC & CONNECTIVITY

The Widening Gap

Traffic and connectivity are the **#1 unmet expectation** — and the gap has widened since 2023.

89% of residents & 82% of workers would use a dedicated transit corridor to Downtown Tampa.

MIXED-USE ACTIVATION

Demand Has Surged

Demand for new amenities surged from 2023 to 2025: **event/music venue, transit, urban trail, parks, cultural institution.**

The 9-to-5 office district is over. The question is what replaces it.

Thank you!

For more information, please visit hcpassociates.com