



Tampa Innovation District

MASTER PLAN

EXISTING
CONDITIONS

Prepared for HILLSBOROUGH COUNTY, FLORIDA
Prepared by AECOM
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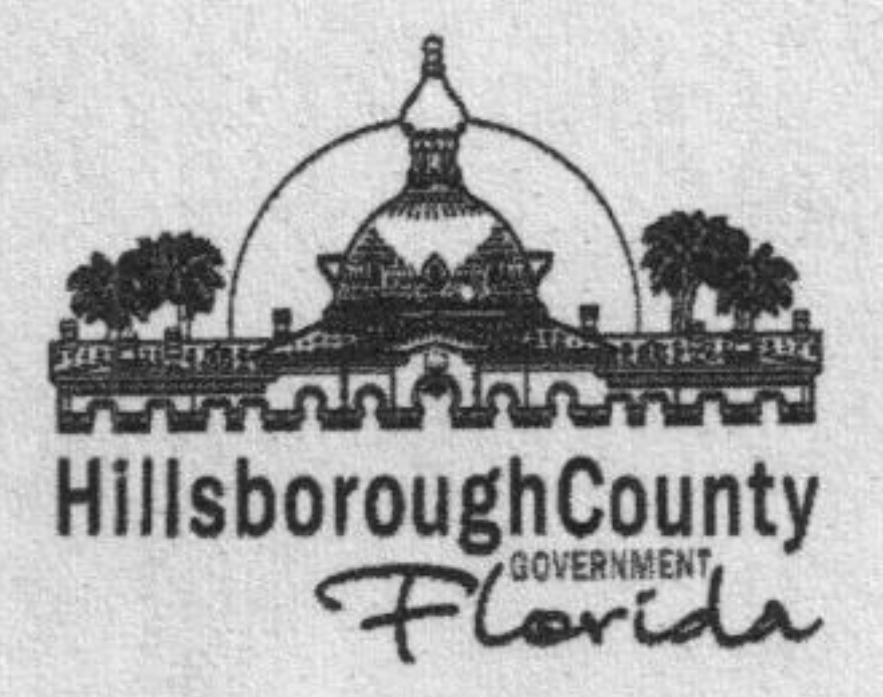
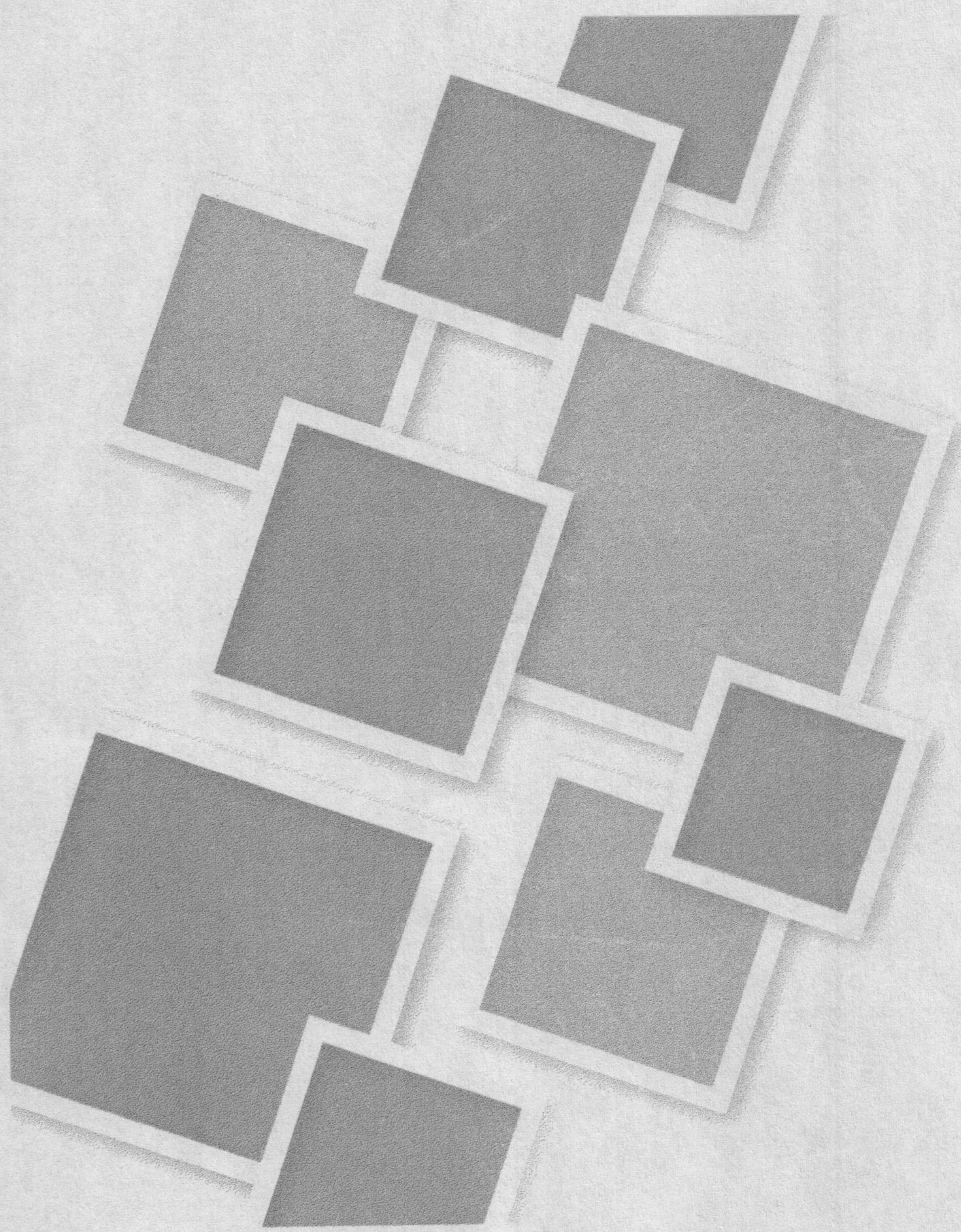
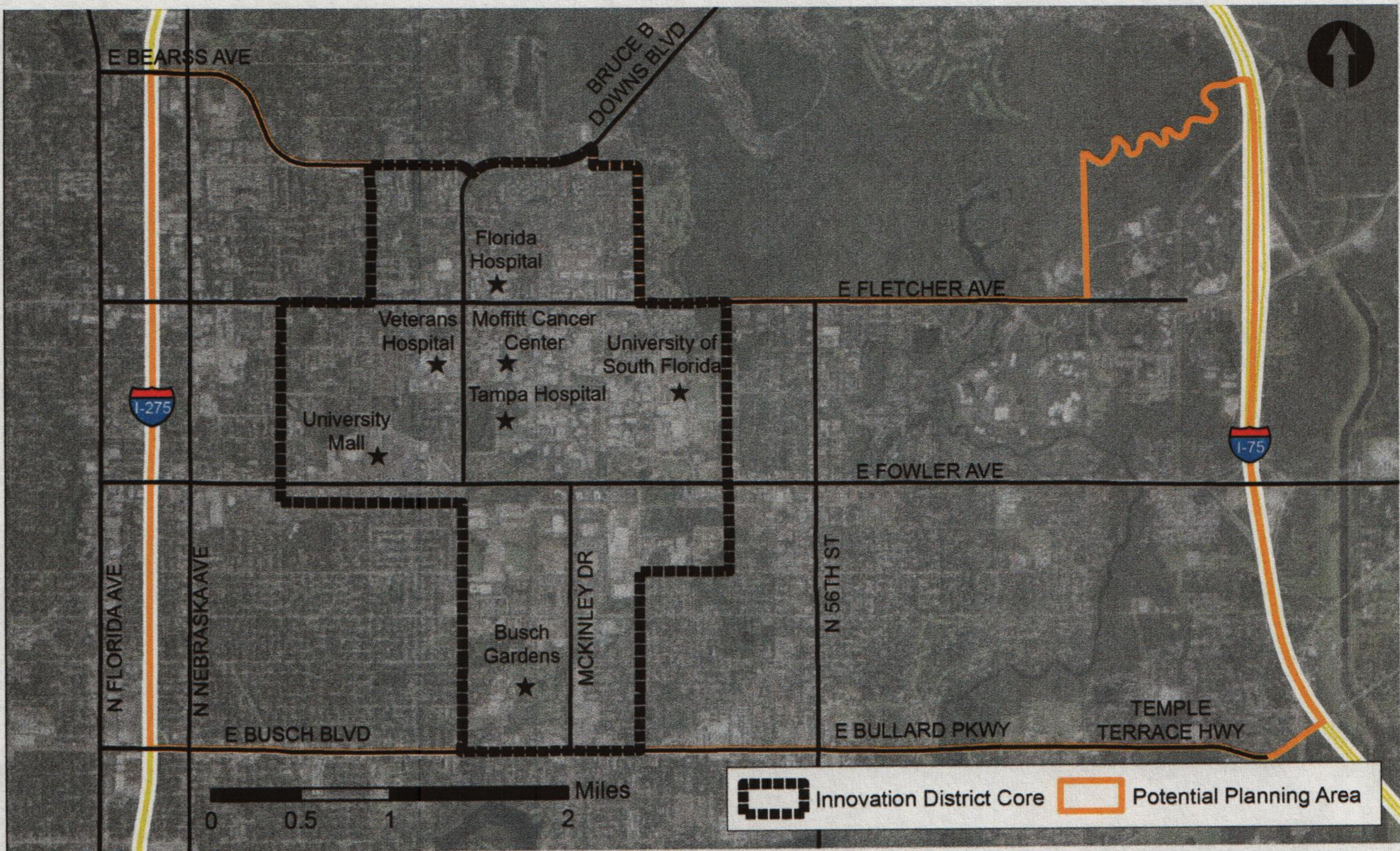


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FIGURE 1.1 INNOVATION DISTRICT BASE MAP



01 Introduction

With momentum gaining in the Tampa Innovation Alliance, Hillsborough County has evaluated existing conditions for the Tampa Innovation District. These existing conditions will form the base for eventual analysis and inclusion into a master plan for the District. The intent is to create the basis for a master plan framework as well as to provide a starting point for benchmarking the progression of the district's development. The master planning process will build on efforts already underway at the Innovation Alliance and at the member institutions, other area facilities, and the jurisdictions that contain the Innovation District—Hillsborough County, Tampa, and Temple Terrace. Though the jurisdictions and institutions have been working together, the planning efforts have largely been independent. Part of this document's and the master plan effort's goal is to document these efforts while also finding potential gaps and discovering ways that the plans can better interact.

Defining the Innovation District

This document refers to the areas shown in Figure 1.1 for data analysis. The Innovation District Planning Study Area is a 19.2-square mile area bound by Bearss Avenue/Fletcher Avenue/Hillsborough River on the north, Busch Boulevard/Bullard Parkway on the south, Interstate 75 on the east and Interstate 275 on the west. This area was selected because it

includes the key institutional stakeholders in the area and encompasses the primary transportation corridors to Interstates 75 and 275.

The Innovation District Core is a 5.6-square mile area located within the Planning Study Area that encompasses the University of South Florida (USF), Busch Gardens, Florida Hospital, James A. Haley VA Medical Center, Moffitt Cancer Center and Research Institute, the University Mall, M2Gen, Tampa Industrial Park and some of the neighborhoods and other industrial areas nearby.

Innovation districts are becoming increasingly popular as cities try to capitalize on the investments and research happening at core institutions in their communities. The Brookings Institution recognized this emerging strategy in "The Rise of Innovation Districts: A New Geography of Innovation in America" which defined innovation districts as "geographic areas where leading-edge anchor institutions and companies cluster and connect with start-ups, business incubators, and accelerators.

They are also physically compact, transit-accessible, and technology-wired and offer mixed-use housing, office, and retail." They note that increasingly "Rather than building on green-field sites, marquee companies in knowledge-intensive sectors are locating key facilities close to other firms, research

97 utility patents. There are approximately 42,000 full- and part-time students at USF, and 49,000 throughout the USF system.

In addition to liberal arts, physical sciences, and the College of Medicine, USF also has a cybersecurity program that offers a master's degree and graduate certificates in cybersecurity. USF's cybersecurity program is designated as a National Center of Academic Excellence in Information Assurance/Cybersecurity. The program, like the rest of the University, is veteran-friendly. In fact, USF was ranked 4th in the nation for the "Top College for Vets" by Military Times Edge Magazine in 2012. USF's location in Tampa gives the program the edge of having US Central Command and US Southern Command presences at MacDill AFB.

The USF Muma College of Business was recently ranked 16 among public schools across the nation. The College of Business offers several majors, minors, and graduate degrees including General Business Administration, Accounting, Finance, Entrepreneurship, and more. USF's entrepreneurship program was also recently ranked 17 in the nation by the Princeton Review. USF's accounting program is also recognized among the top 15 percent of accounting programs in terms of first-time CPA exam pass rates. Overall, the education and training in business the University offers is a great asset to the Tampa Innovation District.

USF also has a robust innovation infrastructure through the USF Research Foundation (USRF), the USF Research Park, and USF CONNECT.

The USF Research Park (USFRP) is a key mechanism that links USF researchers to businesses in need of research partners and was named "Emerging Research Park of the Year" by the Association of University Research Parks in December 2008 in recognition of excellence in bringing technology from the laboratory to economic viability.

USFRP is also home to USF CONNECT which serves as host to several innovative centers for entrepreneurship: the Tampa Bay Technology Incubator (TBTI) with over 60 resident and affiliate companies, the Student Innovation Incubator (SII) with 39 student-led companies, and the FirstWaVE Venture Center in downtown Tampa. Over 30 of the companies currently in the Incubator specialize in biological, medical, or biomedical sciences.

TBTI supports technology research as a catalyst for economic development and facilitates the growth and development of life science and other high tech companies. TBTI provides entrepreneurial support programs, services and physical infrastructure to startup and advancing technology companies. TBTI's facilities include state-of-the-art wet labs with more than \$1 million in shared equipment, high

tech conference rooms, office spaces and informal meeting areas.

The SII was launched in November 2013 in partnership with USF's Center for Entrepreneurship, with the goal of nurturing nascent businesses even earlier in the process than companies that are eligible to enter TBTI. Sixty-five student-led companies have participated in the incubator since its inception.

Additional programs include its partnership with the University of Central Florida and University of Florida in the Florida High Tech Corridor, a 23-County region designed to grow the high tech industry. It also offers matching grants and seed capital programs to assist in commercialization and research funding.

Some of the key areas of research at USF, according to USF Research and Innovation, are in brain disease, veterans' reintegration, sustainability, infectious disease, and photovoltaic technologies, and global juvenile diabetes research. They are also highly regarded in the areas of engineering, advanced materials, global health, drug discovery, and cancer research.

USF also has numerous programs in place to impact the development of the STEM (Science, Technology, Engineering and Mathematics) fields from the Kindergarten through 12th grades, with the goal of

enhancing the talent of the area's future workforce and preparing students to enter undergraduate programs in these fields.

USF and the area health institutions have relationships in research and learning. Many faculty at USF also work at the Moffitt Cancer Center; there have also been research companies started at USF that were spun off from Moffitt. There is some cross-intellectual property between students and faculty at the Tampa VA Hospital.

Moffitt Cancer Center

Moffitt Cancer Center (MCC) is one of the leading cancer treatment and research centers in the Southeast. In fact, MCC is one of the 45 National Cancer Institute-designated centers in the United States, and the only one in the State of Florida. Moffitt has five research programs that work together to understand and cure cancer: cancer biology and evolution, cancer epidemiology, chemical biology and molecular medicine, health outcomes and behavior, and immunology. Currently, MCC has clinical trials and studies on over 39 different types of cancers including brain and nervous system, male breast cancer, female breast cancer, leukemia, thyroid, and more. As one of the USF Morsani College of Medicine's affiliate hospitals, not only is Moffitt leading the region in cancer treatment and research,

but it is also training the future of physicians and researchers specializing in cancers.

In addition to treatment, research, academics, and training, Moffitt Cancer Center also works on creating new technologies for cancer treatment and research and commercialization of these technologies. Moffitt has 32 technologies available for licensing under their pharmaceuticals and biologics division, six in their vaccines and cell therapies division, 45 in their diagnostics division, and 18 in their devices, tools, and software division. These technologies range from drugs fighting cancer or cancer-related complications to genetic signatures used for screening and diagnostics and transformative software that change how the medical field tracks and plans cancer treatments. In addition to these technologies, Moffitt is also a major player in medical startups with a hand in nine different startups. Finally, Moffitt Cancer Center also owns M2Gen, a for-profit subsidiary that works with personalized treatments. M2Gen uses the best clinical data, molecular technology, and tissues to create these treatments. Currently, M2Gen has over 85,000 patients across the nation and has over 40,000 tumor samples, and around 300 new patients enrolling weekly. M2Gen is rapidly increasing its research, treatments, patient base, and data. With all of these accomplishments, Moffitt Cancer Center

is undoubtedly a major asset within the Tampa Innovation District.

The Moffitt Cancer Center has 206 beds, but mostly provides outpatient procedures. Sixty percent of patients are from within an hour drive, but it also receives out-of-state patients, including two percent of patients who come from abroad. It recently constructed a 100,000 square foot research facility on McKinley Avenue. This new facility is primarily for outpatient procedures and research, so it will allow for more inpatient care on the main campus. Under Moffitt's master plan, they have 10.2 acres left for growth on the main campus.

Florida Hospital

Florida Hospital Tampa is part of a system of 26 hospitals in the State of Florida, which opened in 1968. Florida Hospital Tampa, located in the heart of the Tampa Innovation District, provides tertiary care for all areas. This location receives five to ten transfers per day from other hospitals. Florida Hospital Tampa is home to the Florida Hospital Pepin Heart Institute, which is recognized nationally as a top cardiovascular treatment and research center. The hospital has 493 beds and 22,000 admissions annually. The hospital has invested in its intensive care unit and emergency room in recent years and provides a "Doctor First" Emergency

Room, where patients see a doctor before any other medical personnel. It provides an opportunity to utilize new technology being developed at other institutions. Florida Hospital Tampa, like many other medical facilities, is planning to maximize their space. They are planning a Women's & Children's Hospital, which would be a single location for women and children. This facility will have a dedicated ER entrance and will utilize existing spaces. Another project in the works is a 22-bed unit above the ICU.

James A. Haley Veterans' Hospital (Tampa VA Hospital)

Though the Tampa VA Hospital is not a current member of the Innovation Alliance, it is a major contributor to innovation and to the area's identity as a health sciences cluster. It is one of the larger facilities in the country and a leading facility in research and treatment of spinal cord injuries and polytrauma. The Tampa VA Hospital offers 22 specialized treatment programs including cardiac catheterization, health care for homeless veterans, post-traumatic stress disorder, and traumatic brain injury. As a teaching hospital, it has partnerships with the USF College of Medicine, with approximately 1,000 medical and nursing students and residents at the hospital each year. There are 415 beds in the main hospital and 118 beds in the nursing home care unit. Though the main

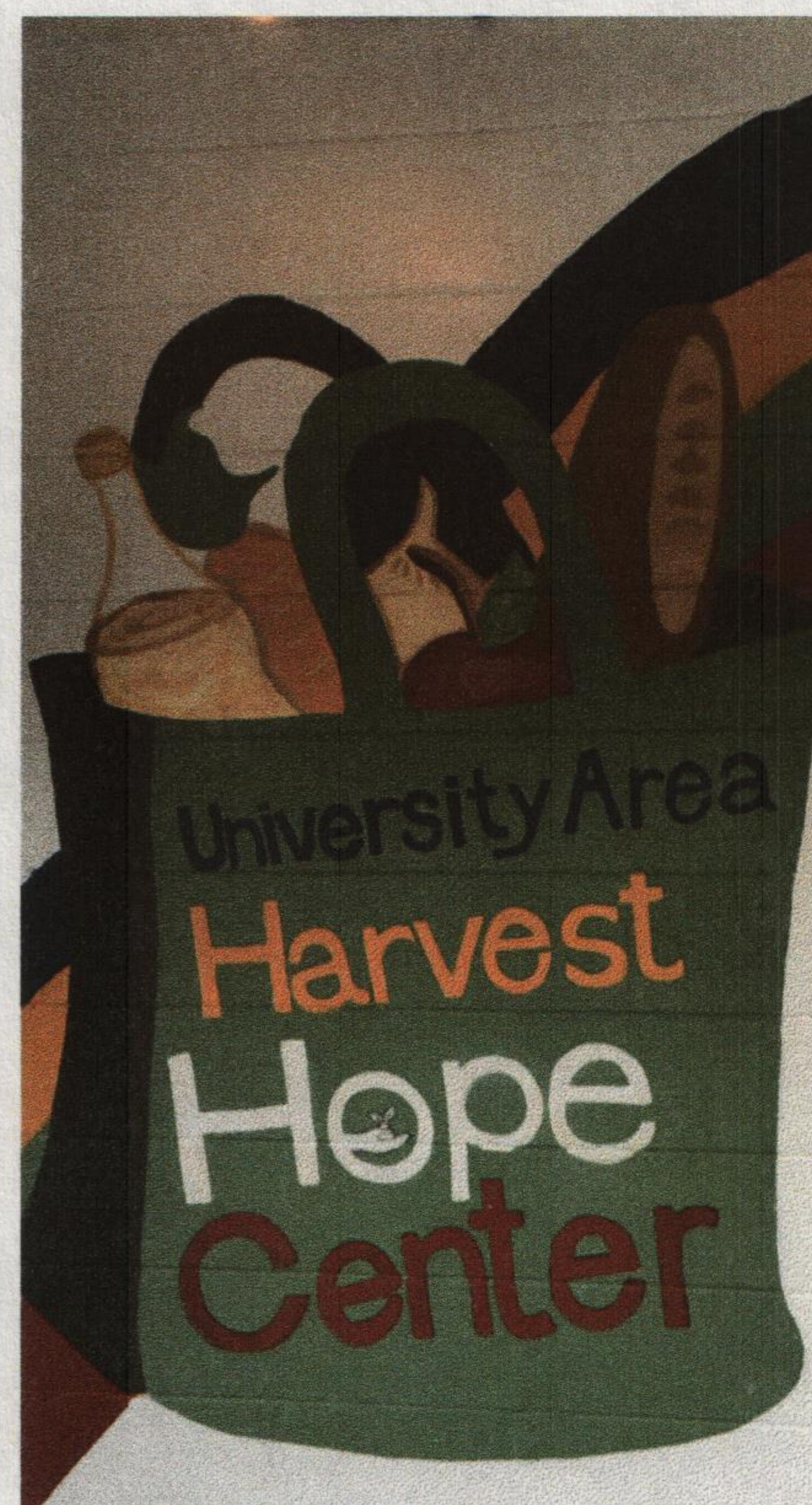
hospital complex is most visible, the hospital also has several additional sites in the area. Additionally, one of the Tampa VA Hospital's missions is to provide emergency preparedness for the greater community. It has approximately 1.3 million outpatient and 14,000-15,000 inpatient visits per year. These visits are by the 90,000 unique active users per year. Currently, the Tampa VA Hospital is undergoing the master planning process as they seek to expand and improve their campus and services.

Commercial Enterprises

There are also key players not involved directly in research and innovation. These have the potential to enhance the diversity of offerings in the area and provide entertainment opportunities as well as locations where the innovators can meet beyond an institutional setting. They also provide the opportunity for the community at large to visit and experience the district.

Busch Gardens

Busch Gardens is a theme park and is a long-standing member of the community. It has attendance of approximately 5 million annually. Management estimates that approximately 50 percent are from the state of Florida, 25 percent are international visitors, and 25 percent are U.S.



SOURCE: AECOM, 2015

labs, and universities so that they can share ideas and practice ‘open innovation.’

The article also defines three models of innovation districts: an “anchor plus” model which is typically in downtowns and midtowns with a concentrated mix of institutions and uses; the ‘reimagined urban areas’ model that retrofits former underutilized warehouse districts; and the “urbanized science park” model where formerly remote, suburbanized areas are densified and mixed uses are added. In many ways, the nascent Tampa Innovation District is a combination of elements of the three models: the area has a concentration of institutions and other uses (but is not as dense as a downtown area might be); there are existing industrial properties in the area that may transition (but it is not a wholly



SOURCE: AECOM, 2015

industrial area such as Boston’s South Waterfront); and the campuses of the anchor institutions have been somewhat suburban and inwardly-focused (though it is not a traditional “park” with unified ownership as envisioned by the third type such as at Research Triangle Park). However, the article points out that there is no singular template for the districts; they vary in size, industry focus, and structure. They are also championed by different groups: such as individual property owners, industrial associations, governments, and institutions among others.

The Innovation Alliance

A critical part of innovation districts—aside from the physical environment that is geared to eliminating barriers to collaboration—is a network, both in the same sector and in different sectors. Tampa’s Innovation District has the building blocks for these networks in place and has already facilitated partnerships between institutions, both intentional and unintentional. The governments of the defined area—Hillsborough County, the City of Tampa, and the Town of Temple Terrace—are supportive of the effort, with Hillsborough County launching the start of this master planning effort as evidence of the support. Many of the major institutions have funded the Tampa Innovation Alliance, an organization formed in 2014. After the appointment of an executive

director in November 2014, the organization has grown to approximately 100 member organizations and individuals. The anchor institutions include University of South Florida (USF), Busch Gardens, Moffitt Cancer Center, Florida Hospital, and RD Management (owner of University Square Mall).

Institutional Resources and Relationships

Recognizing the importance of relationships among Alliance members, this section will briefly examine some of the current connections and programs that are in the area currently, which can be built upon as the district develops.

University of South Florida

USF, though a relatively young university, has a strong research focus, and has been ranked 12th worldwide among universities granted U.S. utility patents by the Intellectual Property Owners Association and National Academy of Inventors in 2013 and 27th among public universities and 43rd among all universities in research spending by the National Science Foundation in 2013. In FY 2015, USF had a record-setting \$440.6 million in research funding; \$166 million was in Federal funding, with the remaining \$273 million being non-Federal. During the same time period (2014-2015), there were

domestic visitors. As of now, the park draws a split of visitors originating at the beaches and from Orlando. It has employed many in the neighborhoods and from USF. It also has an internship program that has been attended by USF students.

University Center Mall

The University Center Mall was recently purchased by RD Management, a company that is interested in revitalizing the property which has underutilized retail space. While it has explored including functions of other institutions in the area, it has not made any concrete plans. However, as a major “common” space in the area, it is potentially an opportunity for the impromptu types of meetings of innovators. The Brookings Institution article mentioned earlier in this report emphasizes the importance of “neighborhood-building amenities” which includes a group of retail, coffee shops, restaurants, and services that “complements the intensive social interactions of the new economy.”

Non-Profit Social Service

University Area Community Development Corporation (UACDC)

The UACDC serves the community through programs and services including job training, computer training, healthy living and food assistance, and housing, among others. It strives to combat area homelessness, unemployment, poverty, youth incarceration, and other social issues and is funded through public and private grants and fundraising and through public contracts for service provision.

The UACDC works with area institutions and businesses, too. Several of its board members are from the Innovation District, and doctors and other professionals from the area institutions often present programs—such as healthy living cooking sessions—to those it serves. One of its central goals, aside from what it has been accomplishing thus far, is to increase home ownership—and through doing so subsequently reduce transience—in the immediate area. Their facilities are available to other area nonprofits, and for rent to other organizations, and they actively work with other charities and nonprofit organizations as well as area institutions and businesses to maximize services for the community.

Some of its existing programs include:

Prodigy—An arts and tutoring program that works with at-risk youth and those already involved in the juvenile justice system. As of July 2015, approximately 1,100 youth were enrolled.

Dreamcatchers Summer Camp—a summer camp that was developed to fill the gap left by discontinuation of the parks and recreation summer camp program. 47 children were involved this year, with programs such as swimming, sports, fitness, crafts, arts, ballet, field trips, and tutoring. According to the UACDC, a decrease in juvenile delinquency was seen coinciding with the introduction of the camp.

Invest—this is a workforce development program that served 1,015 persons in the last year. It includes job readiness training, computer skills guidance, computer courses, networking assistance, and job placement assistance.

STEPS for Success—this is a program that strives to reverse homelessness and break the cycle of poverty through a comprehensive program dealing with the systemic nature of poverty. STEPS stands for Sustainability, Training, Education, Planning, and Support, and the program includes all these elements. Participants receive a personalized prescription to guide them toward ending the cycle of poverty and have a circle of support that assists

them in meeting their goals. There have been 20 participants and there are 230 on the waiting list.

Harvest Hope—a park and community garden with an innovative kitchen where classes are held to teach cooking and healthy food preparation. There were 1,260 pounds of food produced in the last year. This addresses a gap in the availability of fresh and healthy food in the immediate area.

Affordable Housing—the UACDC has owned and operated two affordable housing complexes—Golden Glade and Golden Palms. They have operated at 100 percent or close to 100 percent occupancy in the last year.

Safe & Sound Hillsborough—this program is the product of the Hillsborough County Community Violence Prevention Collaborative, which was created in 2013. The Violence Prevention Collaborative was created to change the way local officials respond to violence in the community. Safe & Sound Hillsborough seeks to transform violence from a public safety to public health issue through public and private collaboration. In April 2013, the 2014 - 2015 Strategic Plan was

approved by the Board of County Commissioners. According to the plan, the vision of Safe & Sound Hillsborough is “to build strong families, safe schools and healthy neighborhoods.” This program is purely preventative in nature with the idea that violence can be avoided through the creation of a safe environment and community. The program aims to decrease mental health issues, substance abuse, and community deterioration by increasing community connectedness, positive relationships, and the provision of relevant public resources and services. Not only does Safe & Sound recommend the development of support systems in schools, correctional facilities, and other communal entities, but it also calls for the creation of business development districts to foster economic sustainability throughout the County. In addition to fostering collaborative efforts, support systems, and business development districts, this program also recommends increasing access to and the beautification and maintenance of public spaces. By cleaning up deteriorating communities and neighborhoods, this program hopes to foster a sense of community and to improve the mental and physical health of residents.

02 Identification of Markets and Investors

The University of South Florida—a key member of the Innovation Alliance and proponent of research in the region as well as the area—through its research infrastructure—provides insight into the types of research developments and companies that could form the initial ground for the Innovation District. They are already integral parts of the innovation environment from which additional developments can build. However, as USF emphasizes, this is only a starting point; the research community at large—both at the university and globally—continues to evolve. Therefore, as the master planning process continues, the key will be to integrate flexible solutions for the infrastructure to accommodate new and emerging fields as the Innovation District develops.

USF Technology Transfer

USF aggressively pursues grants and contracts for research, while also promoting interdisciplinary collaboration and a spirit of entrepreneurship, to bring scientific discoveries to market. Technology transfer—the process of transferring discoveries made by faculty researchers from the lab to the marketplace—has an important role in university research and economic development. In FY2015, the USF Technology Transfer Office (TTO), with 15 staff, executed a record-breaking 119 license and option agreements, ranking it 12th and placing it ahead of Stanford (106 with 42 TTO staff), MIT (91 with

SUCCESS STORY:

LION BIOTECHNOLOGIES, INC.

EXPANDING RELATIONSHIPS THROUGH THE USFRP

Drawn to the Tampa Bay region from Houston, TX because of research at the Moffitt Cancer Center, Lion Biotechnologies, Inc. (Lion) selected the USF Research Park in the summer of 2014 and, because of USFRP's quick ability to accommodate Lion's bio research space needs, has already expanded its footprint. Lion is a company leveraging and enhancing the power of tumor infiltrating lymphocytes (TILs) to treat, and potentially cure, all solid tumors. Lion is integrated into the local community and is partnering with several organizations in ways such as licensing both Moffitt and USF technologies, joining the Tampa chapter of BioFlorida, and speaking at a National Academy of Inventors workshop. USF students have internship opportunities in Lion labs and Lion's Chief Science Officer has an adjunct faculty appointment with Moffitt Cancer Center.

SUCCESS STORY:

INTEZYNE TECHNOLOGIES, INC.

2004 TO 2015 CONCEPT TO CLINICAL TRIALS

While riding on a train one afternoon to Amherst, Massachusetts, friends Habib Skaff, PhD, and Kevin Sill, PhD, made the decision to leverage their expertise in polymer chemistry and start a company. The goal: address the drug delivery problems that exist in the oncology space and treat cancer better. In June 2004, Intezyne Technologies was born (Drug Delivery July/August 2010).

By September of 2004, the biotechnology start-up from Massachusetts had signed a letter of intent to set up approximately 1,000 square feet of office and lab space in the new Tampa Bay Technology Incubator. "The community, environment and services provided by USF CONNECT, and TBTI were critical in our decision to establish the company in the Tampa Bay area," said Intezyne Technologies CEO Habib Skaff.

Intezyne Technologies is now a clinical-stage company addressing current and future challenges in drug delivery by developing advanced polymers tailored to a variety of therapeutic applications. With an extensive portfolio of product offerings, Intezyne Technologies offers physicians individual compounds that aid in the treatment of a variety of tumors. Since the company's inception, Intezyne Technologies Inc. has received over \$25 million in funding and \$2.5 million in grant funding from state, federal and non-profit organizations. In 2014, Intezyne was ranked among the few companies in Florida to receive the most research awards from the National Cancer Institute.

Since joining the incubator in 2004, Intezyne Technologies has grown their footprint in the USF Research Park, expanding to more than 5,000 square feet of office and lab space. The company remains engaged with TBTI and maintains TBTI's Nuclear Magnetic Resonance (NMR) core facility, conducting routine maintenance and running samples for other clients in the incubator.

41 TTO staff), Harvard (81 with 39.1 TTO staff) and Georgia Tech (29 with 9 TTO staff) according to the most recently available data from the Association of University Technology Managers (AUTM). In the last five years, USF has executed 410 license/option agreements. Each of these agreements potentially creates a new partnership and relationship with the university that, in many cases, will have a greater impact than the agreements alone, including new research partnerships, student training and jobs, and regional recruitment around the university.

The limited monopoly that patents provide is a necessary component to developing these partnerships and the willingness for industry partners to make the substantial investment in developing the technology. USF is a global patent leader, ranking 10th nationally and 13th worldwide among universities for U.S. patents granted in 2014, according to the National Academy of Inventors (NAI) and the Intellectual Property Owners Association (IPO). USF, with 104 patents in 2014, has ranked among the top 15 universities worldwide for the past five years in generating new inventions. It is important to note that the time from initial research to issued patents can vary and, on average, can take five or more years. Patents issued this fiscal year do not necessarily reflect future issued patents, current faculty, research taking place at USF, or the future direction of institutional funding.

Additionally, currently there are 36 potential products at preclinical, development and prototype stage as well as 57 products available on the market. There are 12 USF technologies in human clinical trials.

USF Business Development

USF also has the goal to foster growth of new businesses based on USF research as a part of its technology transfer program. In FY2015, USF was ranked 16th in the U.S. for number of new startups. There were 11 new startup companies formed, which tied it with Caltech, and placed it above Harvard University (3 startups). The university and the state have a focus on enabling the economy. Within the last five years, USF's Technology Transfer Office has facilitated the formation of 49 startup companies—in various fields including therapeutics, construction engineering, medical devices, software, and engineering design.

Modelithics was one such company, started in 2001. It provides innovative software that speeds up wireless product design. And, the company continued to impact the USF community through providing internships or employment to over 75 USF business and engineering students. It also has provided \$200,000 in grants to the College of Engineering, with \$100,000 in matching funds from the Florida High Tech Corridor Council and \$8,000 in grants to the College of Business.

While additional funding resources (such as a regional early stage fund) will be a key component in continued advancement in this area, USF's incubator and TTO work to help startup companies take advantage of the existing regional and internal funding opportunities—from seed through venture—which is critical to having a strong and successful regional ecosystem to encourage business startup activity.

For example, leveraging USF's innovative and entrepreneurial faculty in the area of women's health, USF startup ClearSpec LLC licensed and introduced to the market a device that improves visualization during exams and has the potential to save lives by allowing for earlier detection and treatment of cervical cancer. With the TTO's help, the company applied for and was awarded a \$185,000 State University Research Commercialization Assistance Grant (SURCAG from the state of Florida and later received seed funding from the Florida Institute for the Commercialization of Public Research's (FICPR) Seed Capital Accelerator Program.

ClearSpec also received funding from the USFRF Seed Capital Accelerator Program, a USF program created for USF spin-outs affiliated with the Tampa Bay Technology Incubator. The seed program is designed to provide up to \$50,000 in funding to help start-up companies reach critical development

SUCCESS STORY:

STUDENT INNOVATIONS

Proscia is a cloud-based platform that combines computer intelligence and pathology to better serve clinicians and researchers. Recently named as one of Inc. Magazine's Top 50 Young Entrepreneurs to Change the World, Proscia's patented technology allows for a clean image analysis that alleviates barriers in the digital pathology market. Proscia has made tremendous strides while being a USF Student Innovation Incubator company. The company has raised over half a million dollars and was recently named one of the "50 Most Disruptive Student-Led Startups in the World" by the Kairos Society for 2015.

Aquamelon Water, a USF Student Innovation Incubator alumni company, specializes in offering cold pressed fresh watermelon juice beverages and was founded by Dez Williams, who is also co-founder of the Student Innovation Incubator. Williams and his team expanded their product availability to include local restaurants and grocers as well as national hotel chains such as Marriott and the Ritz Carlton. The company has begun establishing itself as a local and regional company and has developed a production facility in Central Florida with distribution channels through companies around Tampa. Williams, a USF alumnus, is dedicated to keeping his company in the Tampa Bay area.

SUCCESS STORY:
TRANSFORMAIR

LEVERAGING TBTI SUPPORT

Transformair is a clean energy startup in the Tampa Bay area providing a revolutionary air filtration system that removes pollutants from indoor air environments such as bacteria, viruses, mold, bio-aerosols and other volatile organic compounds, without producing harmful byproducts. Transformair brought to USF technology developed at the University of Florida and has continued to improve upon that technology through research partnerships at USF.

The company joined TBTI in 2010, leveraging TBTI's resources to grow from a seed stage company to the point of receiving venture capital. TBTI provided space for early units to be assembled and supported the company by making funding and pitching opportunity introductions. Additionally, TBTI has been working with the company on beta testing their product by installing units in the USFRP.

Earlier this year, Transformair's advanced technology won the Startup Showcase at the 2015 Solid Con in San Francisco. The company advanced to a level of receiving funding from a competitive California and New York market and has remained committed to its connection and presence at USF and TBTI.

milestones in a short time period and get to market quicker.

USF is a partner of the Florida High Tech Corridor Council (Corridor) with University of Central Florida (UCF), and University of Florida (UF). The Corridor's goal is to grow high tech industry and innovation through partnerships supporting research, marketing, workforce and entrepreneurship. In FY2015 alone, seven USF spin-out companies received matching funds, including: Formerics, LLC; Moterum, LLC; Phoinix Holding Company, LLC; Pure Molecular, LLC; Stem Genesis, LLC; Transgenex Nanobiotech, Inc.; and Trash2Cash Energy, LLC.

The USFRP is a key component and link between the university research and the greater research and business communities. It and its programs, including the Tampa Bay Technology Incubator have contributed to economic development by facilitating the growth of high tech companies.

TBTI companies such as Claro Scientific and Saneron-CCEL Therapeutics have secured multi-million dollar grants from the National Institutes of Health and the Gates Foundation. Companies have also been awarded Small Business Innovative Research (SBIR) and Small Business Technology Transfer (STTR) grants for commercial application of innovative technologies. Among TBTI's startup

FIGURE 2.1 INCUBATOR COMPANY DATA

SOURCE: USF; AECOM, 2015.

GEOGRAPHY	TOTAL COMPANIES			
	2004	2013	2014	2015
Companies	19	42	55	64
Jobs	N/A	185	200	230

COMPANY SECTOR BY CATEGORY				
Bio/Life Sciences	N/A	62%	53%	60%
Engineering	N/A	19%	23%	20%
Software & Information Technology	N/A	9.5%	12%	8%
Other	N/A	9.5%	12%	12%

companies, 60 percent are USF spin-outs and 40 percent are community-based. Community-based companies come to TBTI with a commitment to work with USF by collaborating on research with faculty, by hiring student interns or working with the university in other ways.

TBTI programs enrich the skills and ability of entrepreneurs through workshops and educational seminars, mentoring and coaching by seasoned entrepreneurs and subject matter experts, and highly skilled and involved licensing managers from the USF Technology Transfer Office. TBTI also increases the capacity of entrepreneurs to successfully start and grow companies by providing SBIR/STTR workshops with nationally recognized trainers, pitch competitions, and meetings with angel investors and venture capitalists. TBTI houses offices of the Small Business Development Center and the Florida Institute for the Commercialization of Public Research and won the Tampa Bay Technology Forum's Industry Achievement Award for Excellence in Service. The economic impact of TBTI companies includes over 230 current employees with an average salary of more than \$69,000, current companies have total funding of \$63.1 million received to date, and total annual sales revenues of \$37.1 million.

SUCCESS STORY:

BETABIOTICA, LLC

MAKING A DIFFERENCE INTERNATIONALLY

BetaBiotica, LLC is an example of how the USF Student Innovation Incubator is creating change internationally. Founded in 2014, this company began when it won a Bill & Melinda Gates Foundation Grant in Global Health Explorations. While BetaBiotica is still a young company, its work in probiotics and healthcare for developing nations is profound. Still based in Tampa and now a member of the Tampa Bay Technology Incubator, this company is working on research and the creation of probiotic bacteria strains that optimize the digestive system while also boosting Vitamin A levels. BetaBiotica also works with probiotics that work as anti-malaria agents, and the company aims to provide these probiotics to developing nations at an affordable, low cost.

easier to manufacture. Singh Biotechnology, like many other companies in the Tampa Bay Innovation Incubator and USF Student Innovation Incubator, is doing work that will transform the medical field for the better.

SINGH BIOTECHNOLOGY, LLC (SBT)

TARGETING CANCER

Singh Biotechnology, LLC (SBT) joined the Tampa Bay Innovation Incubator in March of 2015. SBT conducts research to advance the use of novel therapeutics in the treatment of diseases and cancers. By discovering and engineering their own therapeutic agents, SBT provides the medical field with alternative methods in fighting cancers and autoimmune diseases. Currently, SBT has agents that can be used to treat three diseases: signal transducer and activator of transcription 3 (STAT3), mutated KRAS, and tumor necrosis factor-alpha (TNF-alpha). Not only are these therapeutic agents more effective than some traditional, already-existing pharmaceutical compounds, but they are also cheaper and

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03 Demographic and Economic Conditions

This section explores the current demographics of the Planning Study Area and the Innovation District Core specified by Hillsborough County.

Population and Households

Trends and Projections

Hillsborough County is the 4th most populous county in the State of Florida behind Miami-Dade, Broward, and Palm Beach County. Just like these other counties, Hillsborough has experienced steady growth over the years. As of 2015, Hillsborough County's population is estimated to be over 1.3

million which accounts for 45.2 percent of the entire Tampa-St. Petersburg-Clearwater, FL Metropolitan Statistical Area (MSA) population. With a compound annual growth rate of 1.3 percent from 2010 to 2015, Hillsborough County is growing at a steady pace. The Innovation District Core within the Planning Study Area has experienced almost as much growth as Hillsborough County. With a compound annual growth rate of 1.14 percent from 2010 to 2015, the Innovation District Core is expanding at almost the same pace as Hillsborough County. The Planning Study Area has the lowest rate of growth in comparison to the Innovation District Core, Tampa, Hillsborough County, and the MSA. Despite having the lowest rate of growth, the Planning Study Area

FIGURE 3.1 POPULATION, 2000 TO 2015

GEOGRAPHY	POPULATION			CHANGE, 2000 TO 2010			CHANGE, 2010 TO 2015		
	2000	2010	2015	Number	Percent	CAGR	Number	Percent	CAGR
Innovation District Core	23,965	28,372	30,024	4,407	18.39%	1.70%	1,652	5.82%	1.14%
Share of MSA	1.00%	1.02%	1.04%						
Planning Study Area	82,141	89,887	92,583	7,746	9.43%	0.91%	2,696	3.00%	0.59%
Share of MSA	3.43%	3.23%	3.20%						
Tampa	303,321	335,709	351,854	32,388	10.7%	1.0%	16,145	4.8%	0.9%
Share of MSA	12.7%	12.1%	12.2%						
Hillsborough County	998,970	1,229,226	1,308,304	230,256	23.0%	2.1%	79,078	6.4%	1.3%
Share of MSA	41.7%	44.2%	45.2%						
MSA	2,395,997	2,783,243	2,893,923	387,246	16.2%	1.5%	110,680	4.0%	0.8%

SOURCE: ESRI; AECOM, 2015

is still growing. Figure 3.1 shows the population and change of the different geographies from 2000 to 2015.

Hillsborough County's number of households are also growing, but at a slower pace in comparison to overall population growth. The number of households in Hillsborough County has grown by 5.9 percent between 2011 and 2015. Much like population growth, the Innovation District Core has observed almost as much growth as the County. The Innovation District Core gained 5.6 percent more households from 2011 to 2015. The growth rate of households for the Innovation District Core is 1.1 percent and 1.2 percent for Hillsborough County. Interestingly, the Planning Study Area has a compound annual growth rate less than half of those of the Innovation District Core and County. See Figure 3.2.

Age and Sex

Hillsborough County's current population is dominated by people aged 50 years old and younger with the largest age cohort being 45 to 49 years old. The second largest age cohort is people aged 20 to 24 years old. In the older cohorts, the female population is noticeably larger than the male population. The younger cohorts, 0 to 4 years

FIGURE 3.2 HOUSEHOLDS, 2000 TO 2015

GEOGRAPHY	HOUSEHOLDS			CHANGE, 2000 TO 2010			CHANGE, 2011 TO 2015		
	2000	2010	2015	Number	Percent	CAGR	Number	Percent	CAGR
Innovation District Core	10,041	10,936	11,553	895	8.9%	0.9%	617	5.6%	1.1%
Share of MSA	1.0%	0.9%	1.0%						
Planning Study Area	33,285	34,996	35,896	1,711	5.1%	0.5%	900	2.6%	0.5%
Share of MSA	3.3%	3.0%	3.0%						
Tampa	124,664	135,955	142,477	11,291	9.1%	0.9%	6,522	4.8%	0.9%
Share of MSA	12.4%	11.8%	12.0%						
Hillsborough County	391,364	474,030	502,217	82,666	21.1%	1.9%	28,187	5.9%	1.2%
Share of MSA	38.8%	41.2%	42.2%						
MSA	1,009,316	1,151,263	1,189,826	141,947	14.1%	1.3%	38,563	3.3%	0.7%

SOURCE: ESRI; AECOM, 2015.

FIGURE 3.3 HILLSBOROUGH COUNTY POPULATION PYRAMID, 2010

SOURCE: ESRI; AECOM, 2015.



old and 5 to 9 years old, have slightly larger male populations, as shown in Figure 3.3.

The demographic breakdown of the Planning Study Area is typical of any jurisdiction with a major higher education presence. The largest age group is 20 to 24 years old with more females than males. Within the Planning Study Area, over 33 percent of the space's population is between the ages of 15 and 29 years old. The smallest age cohort in the region is 80 to 84 years old, which can be seen in Figure 3.4. Overall, the Planning Study Area has a very young population.

The difference in age groups in the Innovation District Core is much more dramatic than in the other areas examined. A majority of people fall in the 20 to 24 years old age cohort, and the overall population has slightly more females than males. The three largest cohort groups are 20 to 24 years old, 15 to 19 years old, and 25 to 29 years old. The Innovation District Core is largely a young population, which can be attributed to USF's location within its boundaries, as shown in Figure 3.5.

Race and Ethnicity

Hillsborough County's current population is mostly white. As of 2014, 69.8 percent of the population is white. The second largest group of people

FIGURE 3.4
PLANNING STUDY AREA
POPULATION PYRAMID,
2010

SOURCE: ESRI; AECOM, 2015.

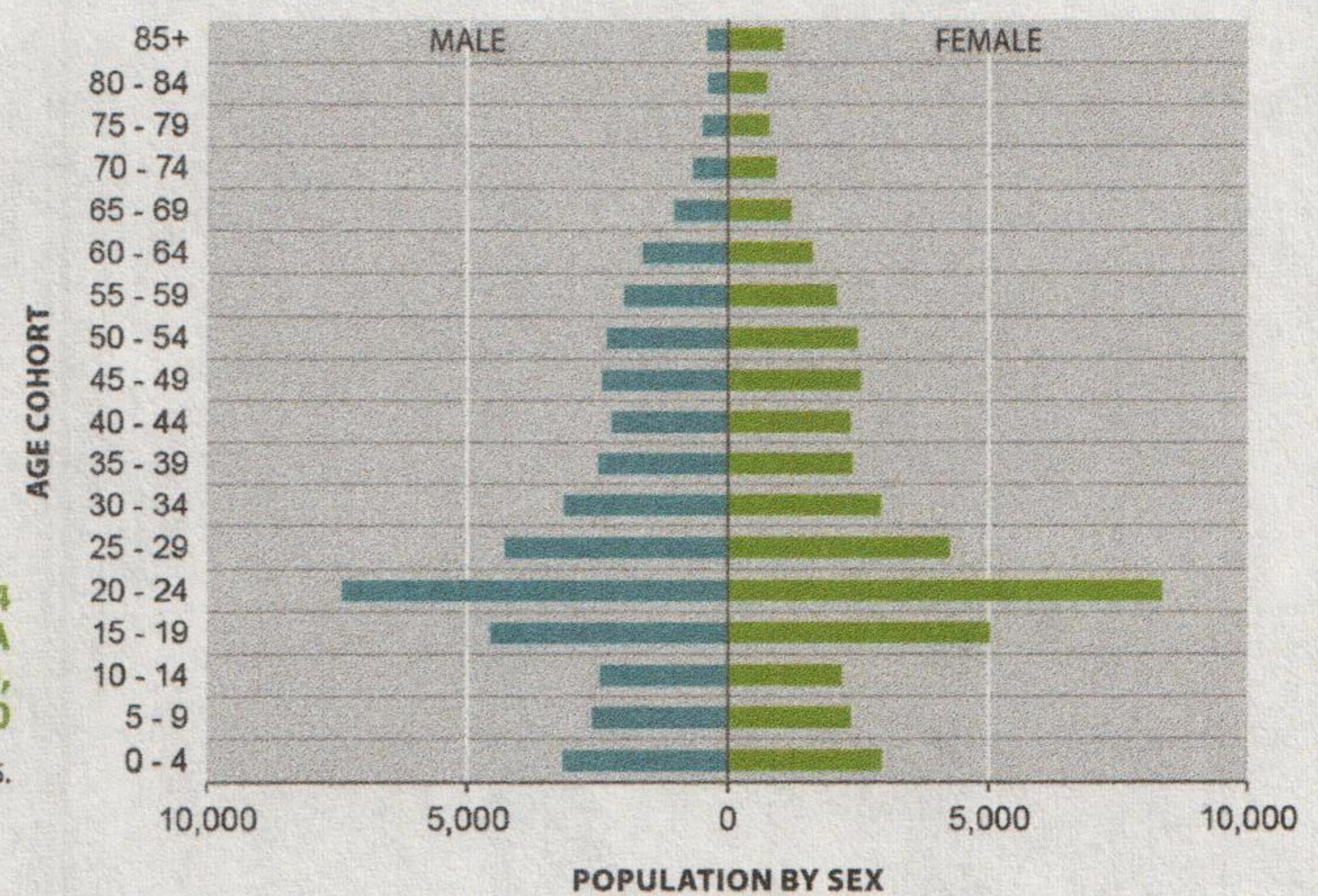
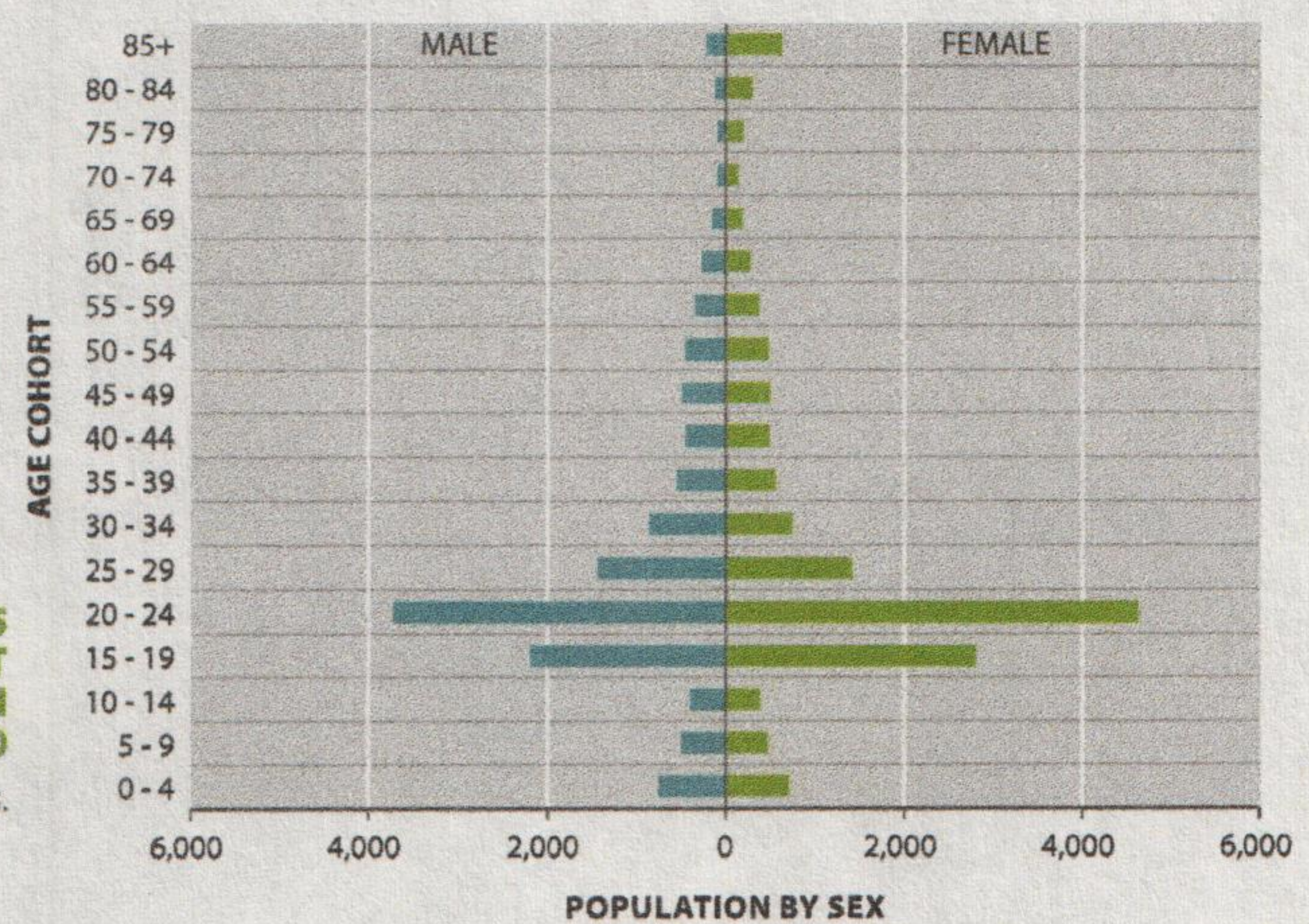


FIGURE 3.5
INNOVATION DISTRICT
CORE POPULATION
PYRAMID, 2010

SOURCE: ESRI; AECOM, 2015.



in the County is black with 16.9 percent share of the population. On the other hand, Hillsborough County has 27.2 percent of the population claiming Hispanic origins, making their ethnic composition more distributed. In 2010, 71.3 percent of the County population was white and 24.9 percent of the population claimed Hispanic origins. According to ESRI Business Analyst Online, Hillsborough County is projected to have a population with 68.3 percent white, 17.1 percent black, and 29.7 percent claiming Hispanic origins by 2020. Hillsborough County's trend in racial and ethnic compositions show a slow, but steady decrease in the white population and a slow and steady increase in other races and ethnicities.

In comparison to Hillsborough County, the Planning Study Area and Innovation District Core are much more diverse. Currently, 52.3 percent of the Planning Study Area population is white, 31.0 percent is black, and 26.7 claim Hispanic origins. In the Innovation District Core, 51.0 percent of the population is white, 32.6 percent are black, and 22.0 percent claims Hispanic origins. ESRI Business Analyst Online projects the Planning Study Area to have a white population of 50.7 percent, 31.3 percent black population, and 29.1 percent claiming Hispanic origins by 2020. The Innovation District Core is projected to have a white population of 48.7 percent, black population of 33.4 percent and 24.3 percent claiming Hispanic origins by 2020. These data are illustrated in Figures 6, 7, and 8.

FIGURE 3.6 RACE AND ETHNICITY, 2010

	INNOVATION DISTRICT CORE		PLANNING STUDY AREA		HILLSBOROUGH COUNTY	
	Total					
Total	28,372	100.0%	89,886	100.0%	1,229,226	100.0%
White Alone	15,151	53.4%	48,628	54.1%	876,438	71.3%
Black Alone	8,966	31.6%	27,505	30.6%	205,281	16.7%
American Indian Alone	113	0.4%	449	0.5%	4,917	0.4%
Asian Alone	1,419	5.0%	3,865	4.3%	41,794	3.4%
Pacific Islander Alone	28	0.1%	90	0.1%	1,229	0.1%
Some Other Race Alone	1,731	6.1%	6,022	6.7%	61,461	5.0%
Two or More Races	965	3.4%	3,236	3.6%	38,106	3.1%
Hispanic Origin	5,646	19.9%	22,202	24.7%	306,077	24.9%

FIGURE 3.7 RACE AND ETHNICITY, 2015

	INNOVATION DISTRICT CORE		PLANNING STUDY AREA		HILLSBOROUGH COUNTY	
	Total					
Total	30,024	100.0%	92,583	100.0%	1,308,304	100.0%
White Alone	15,312	51.0%	48,421	52.3%	913,196	69.8%
Black Alone	9,788	32.6%	28,701	31.0%	221,103	16.9%
American Indian Alone	150	0.5%	555	0.6%	5,233	0.4%
Asian Alone	1,621	5.4%	4,444	4.8%	51,024	3.9%
Pacific Islander Alone	30	0.1%	93	0.1%	1,308	0.1%
Some Other Race Alone	2,012	6.7%	6,666	7.2%	70,648	5.4%
Two or More Races	1,141	3.8%	3,703	4.0%	45,791	3.5%
Hispanic Origin	6,605	22.0%	24,720	26.7%	355,859	27.2%

FIGURE 3.8 RACE AND ETHNICITY, 2020

	INNOVATION DISTRICT CORE		PLANNING STUDY AREA		HILLSBOROUGH COUNTY	
	Total					
Total	31,739	100.0%	96,289	100.0%	1,395,620	100.0%
White Alone	15,457	48.7%	48,819	50.7%	953,208	68.3%
Black Alone	10,601	33.4%	30,138	31.3%	238,651	17.1%
American Indian Alone	159	0.5%	578	0.6%	6,978	0.5%
Asian Alone	1,904	6.0%	5,200	5.4%	62,803	4.5%
Pacific Islander Alone	32	0.1%	96	0.1%	1,396	0.1%
Some Other Race Alone	2,253	7.1%	7,222	7.5%	80,946	5.8%
Two or More Races	1,301	4.1%	4,140	4.3%	53,034	3.8%
Hispanic Origin	7,713	24.3%	28,020	29.1%	414,499	29.7%

SOURCE: ESRI BUSINESS ANALYST, 2015

Educational Attainment

Hillsborough County's population is more educated than national averages. Hillsborough County has more college and high school graduates than the national average. Figure 3.9 shows the breakdown of educational attainment in Hillsborough County and Figure 3.10 shows the same for the United States. 42 percent of the population has a college or postgraduate/professional degree, 45 percent have a high school diploma, and 13 percent have less education than high school.

The educational attainment of the Planning Study Area is similar to Hillsborough County's. Figure 3.11 shows a one percent increase in the amount of college and postgraduate/professional degrees. While the region's percentage of people with higher education increases, the percentage of people who have not completed high school also increases by nine percent in comparison to Hillsborough County's educational attainment.

The educational attainment of the Innovation District Core has only slight variations from that of the Planning Study Area. Figure 3.12 shows a two percent increase in graduate and professional degrees and a two percent decrease in the number of people with less than a high school level education.

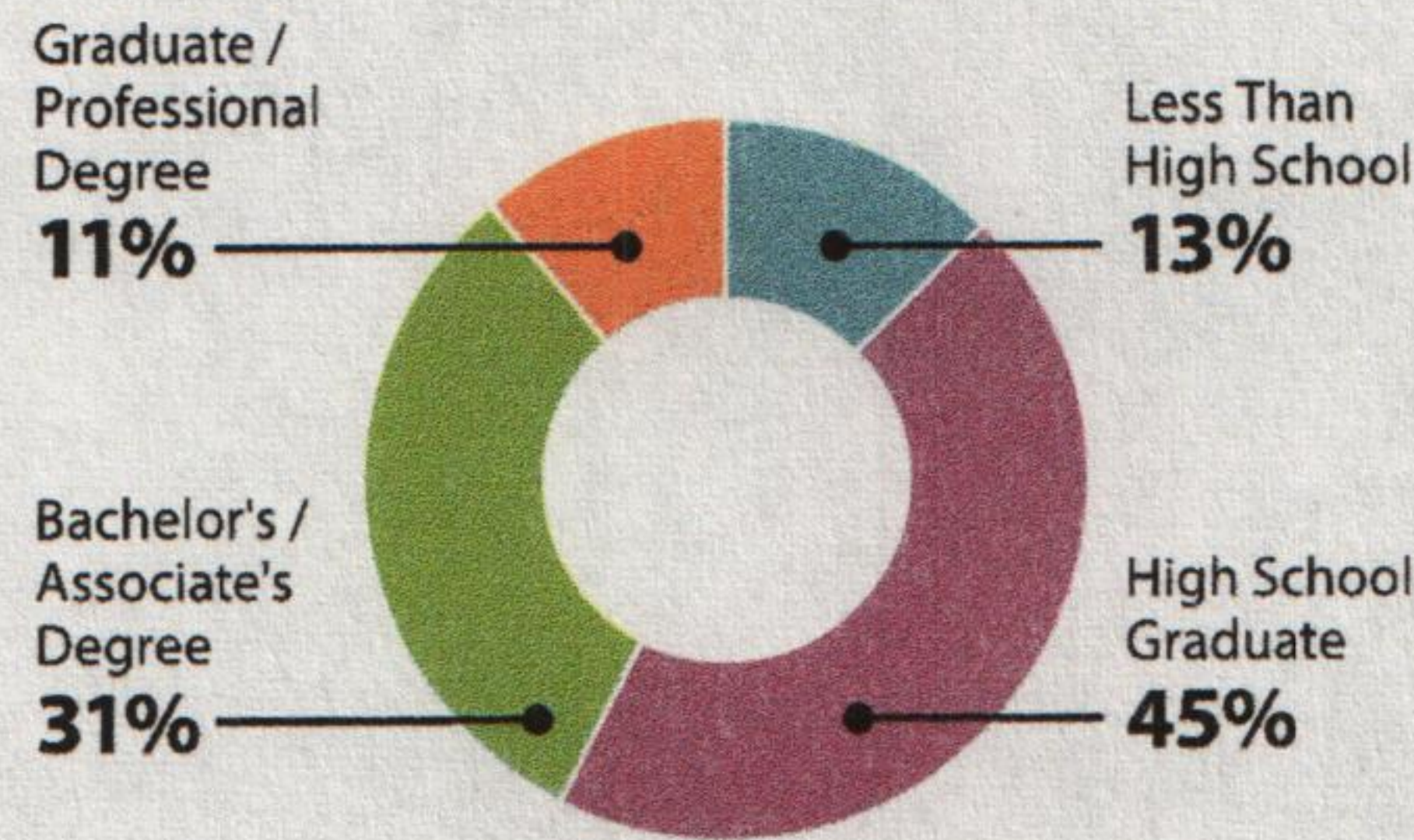


FIGURE 3.9 EDUCATIONAL ATTAINMENT IN HILLSBOROUGH COUNTY, 2015

SOURCE: ESRI; AECOM, 2015.

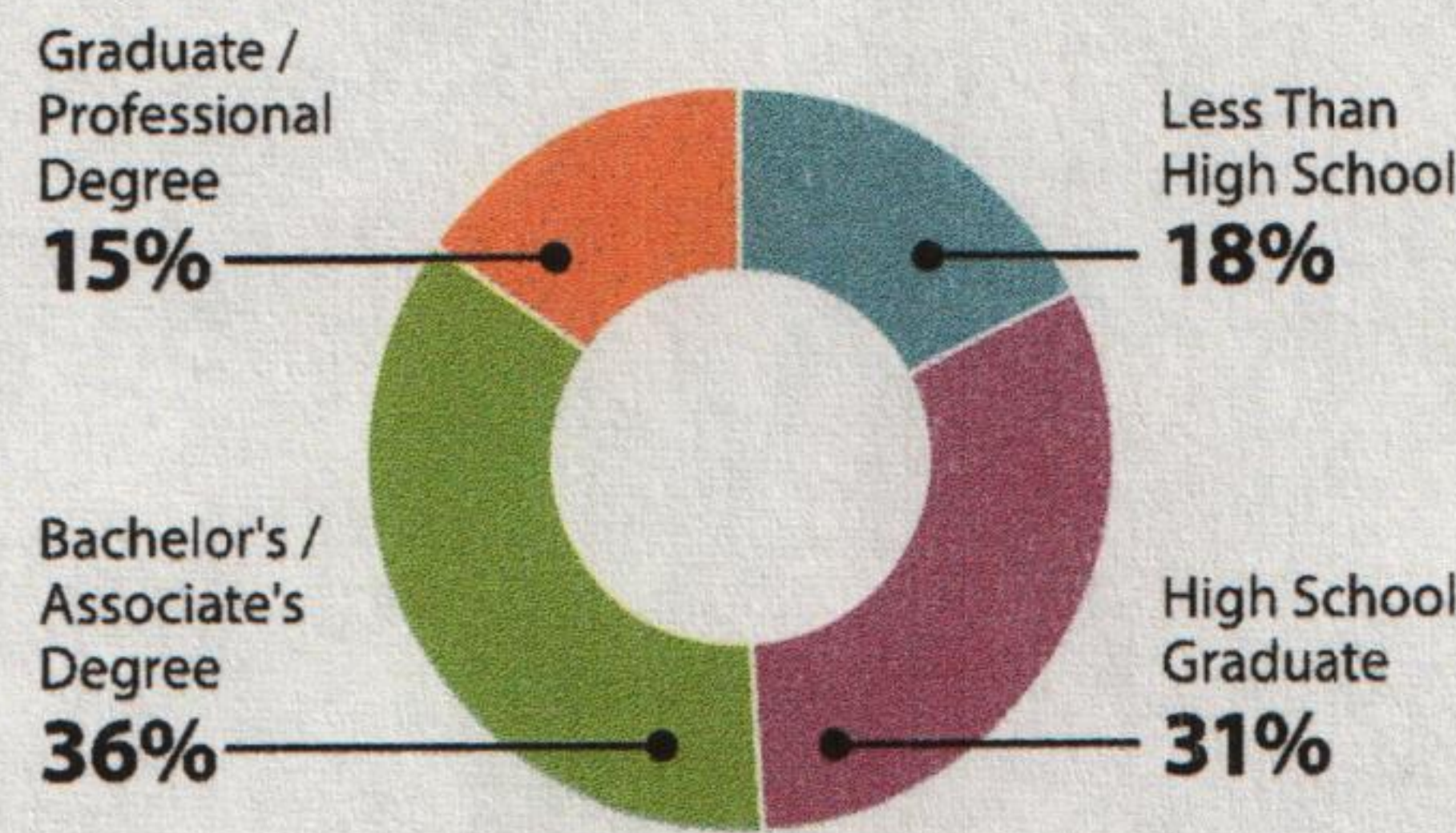


FIGURE 3.10 EDUCATIONAL ATTAINMENT IN THE UNITED STATES, 2015

SOURCE: ESRI; AECOM, 2015.

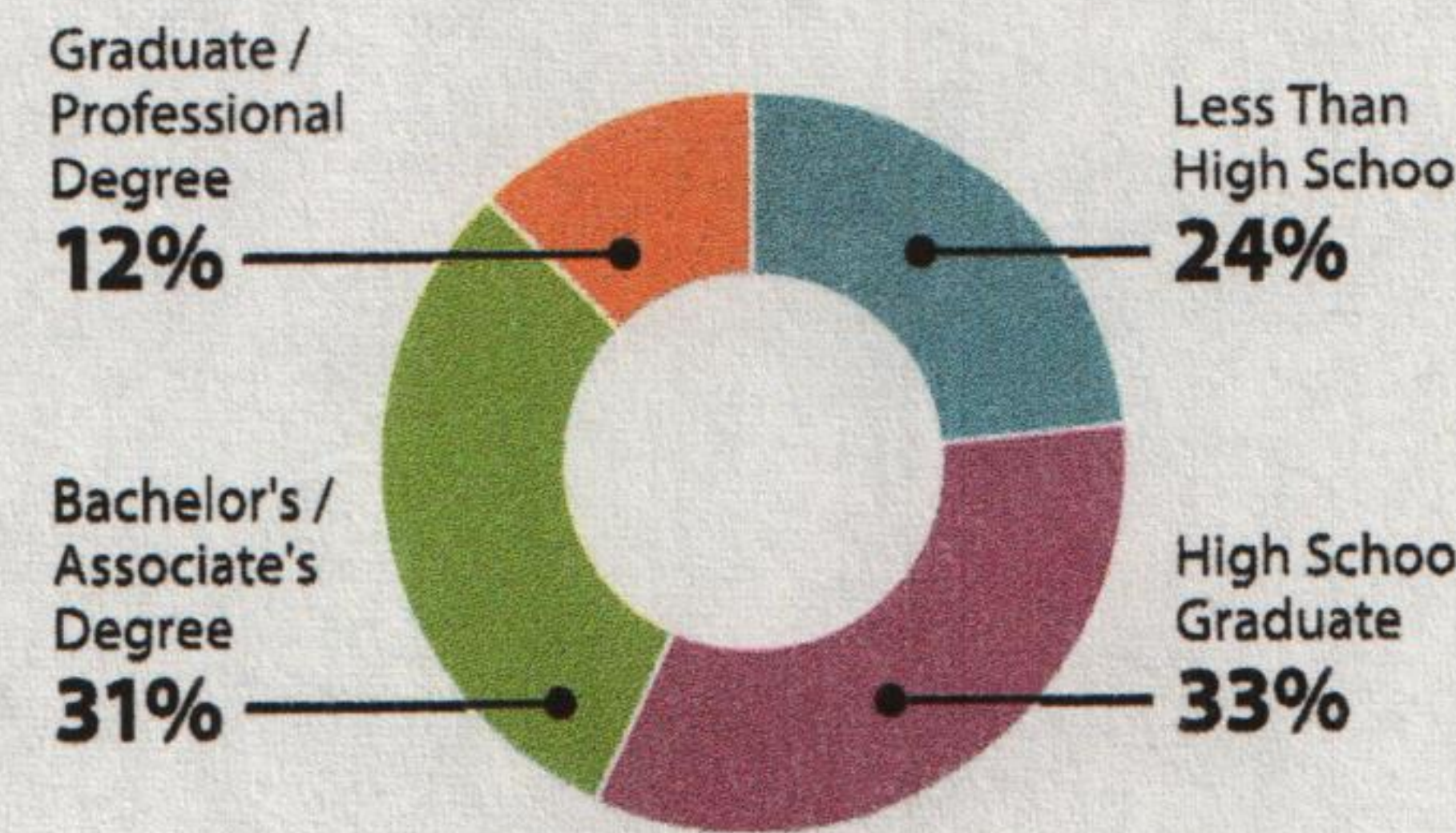


FIGURE 3.11 EDUCATIONAL ATTAINMENT IN THE PLANNING STUDY AREA, 2015

SOURCE: ESRI; AECOM, 2015.

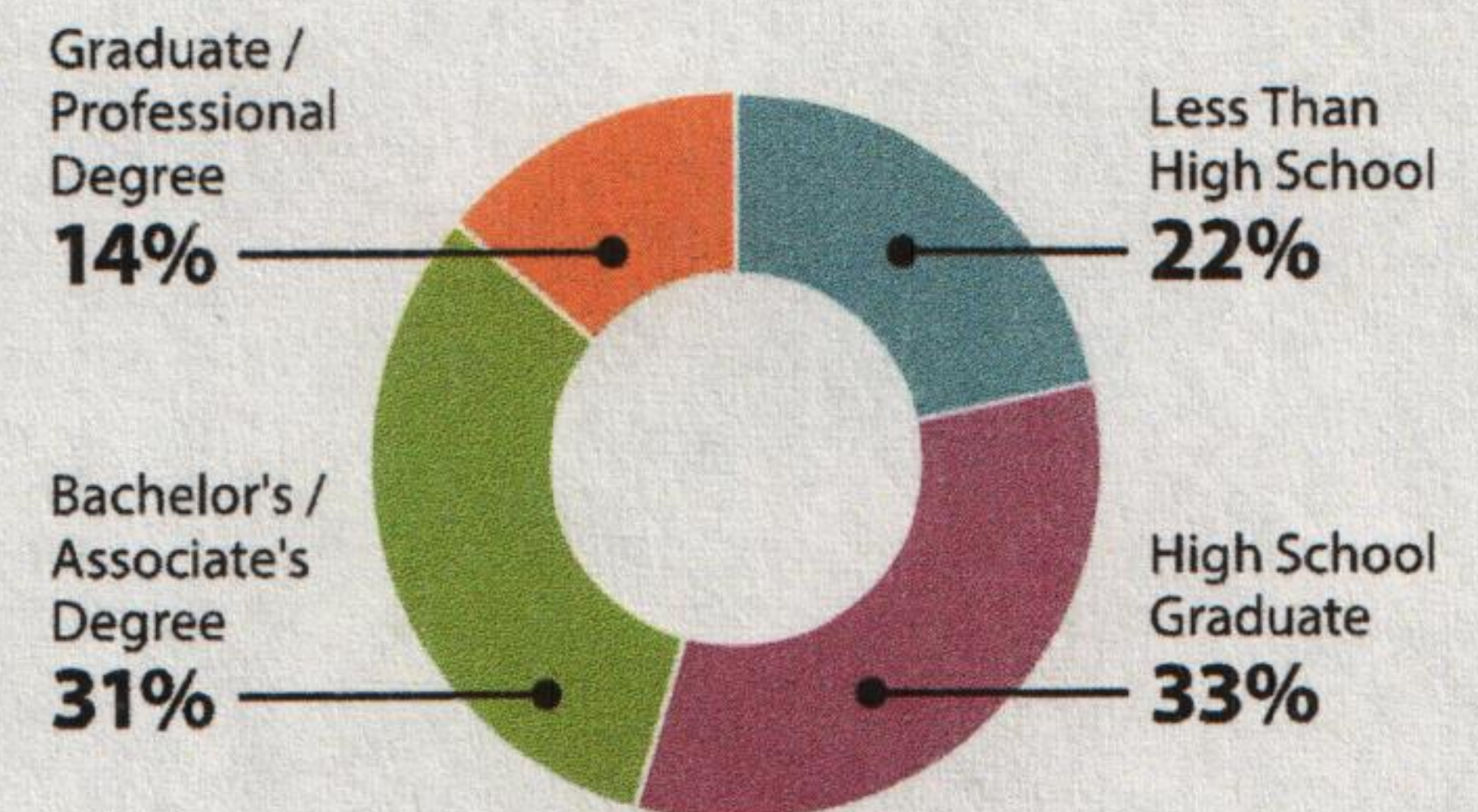


FIGURE 3.12 EDUCATIONAL ATTAINMENT IN THE INNOVATION DISTRICT CORE, 2015

SOURCE: ESRI; AECOM, 2015.

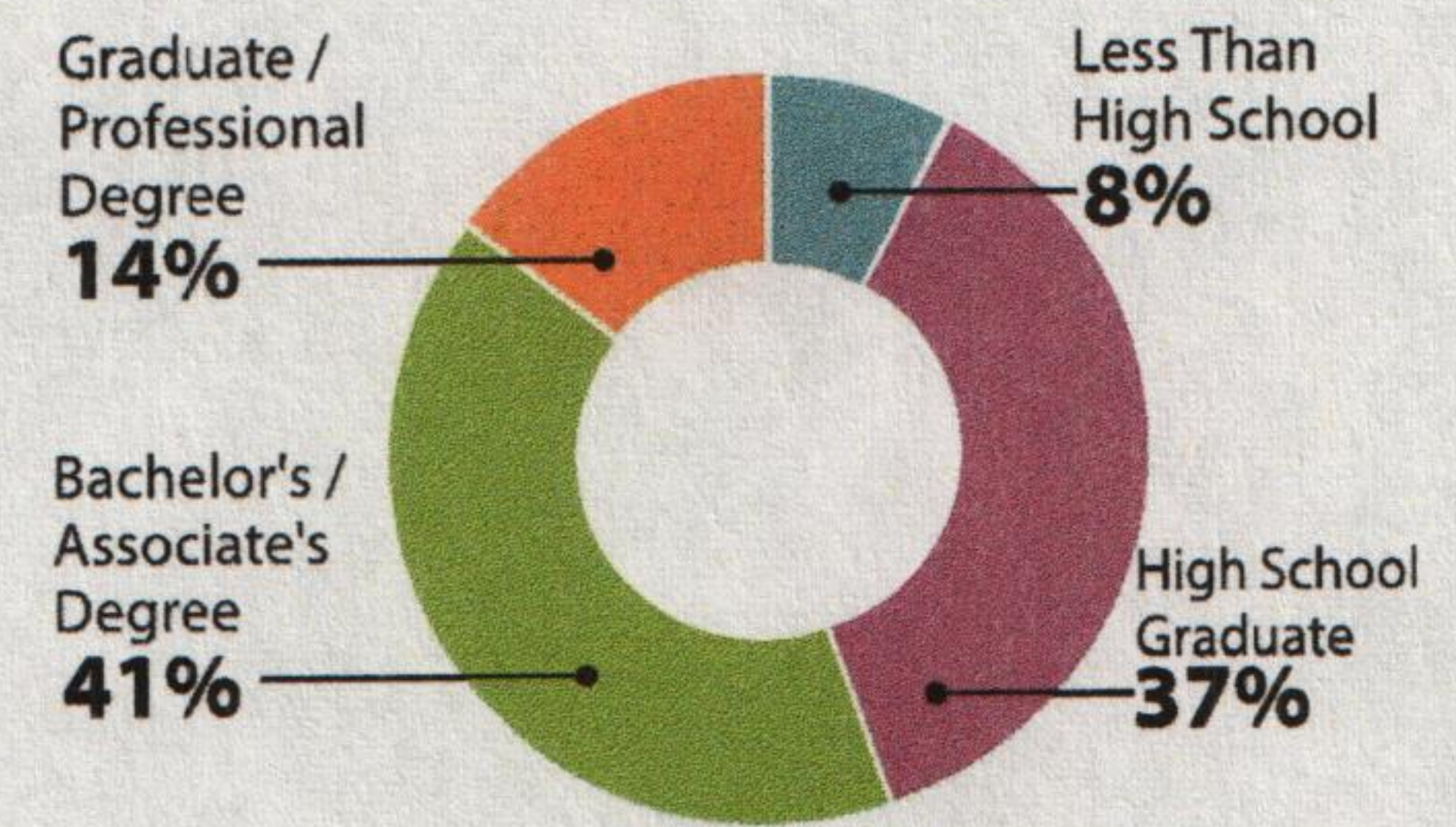


FIGURE 3.13 EDUCATIONAL ATTAINMENT IN THE STATE OF FLORIDA, 2015

SOURCE: ESRI; AECOM, 2015.

Household Size

Hillsborough County has a larger Average household size than the Innovation District Core, Planning Study Area, City of Tampa, and the Tampa-St. Petersburg-Clearwater MSA. The County's average household size has grown from 2.55 in 2010 to 2.56 in 2015. Figure 3.14 shows each geographical jurisdiction observed in this analysis is experiencing growing household sizes, except for Tampa, which has not seen a change in household size between 2010 and 2015. Overall, the region is experiencing steady growth in household sizes.

Household Income and Access Trends

Median Household Income

Household income is a great measurement of how a local population is fairing and how a local economy is performing. For this analysis, median household income was used to determine the Planning Study Area population's wealth. Figure 3.15 shows no data points for the Innovation District Core or Planning Study Area. This is because median household income was not available for years prior to 2015. Hillsborough County has the highest median household income, which is \$3,471 higher than the Tampa-St. Petersburg-Clearwater, FL MSA. In addition to being the wealthiest with geographies observed, Hillsborough County also has the highest median household income growth rate of one percent, which is 0.3 percent higher than the MSA. Currently, the median household income for the County is \$50,226, which is more than double the median household income of the Innovation District Core, which is \$23,508. The Planning Study Area has a higher median household income than the Innovation District Core with \$29,572. Despite being slightly better off than the Innovation District Core, the median household income of the County is 1.69 times higher.

FIGURE 3.14 AVERAGE HOUSEHOLD SIZE FROM 2000 TO 2015

SOURCE: ESRI; AECOM, 2015.

GEOGRAPHY	HOUSEHOLD SIZE		
	2000	2010	2015
Innovation District Core	1.99	2.05	2.08
Planning Study Area	2.32	2.37	2.39
Tampa	2.36	2.38	2.38
Hillsborough County	2.51	2.55	2.56
MSA	2.33	2.37	2.39
Florida	2.46	2.48	2.48

FIGURE 3.15 MEDIAN HOUSEHOLD INCOME FROM 2010 TO 2015

SOURCE: ESRI; AECOM, 2012.

GEOGRAPHY	MEDIAN HH INCOME		CHANGE, 2010 TO 2015		
	2010	2015	Number	Percent	CAGR
Innovation District Core	—	\$23,508	—	—	—
Planning Study Area	—	\$29,572	—	—	—
Tampa	\$42,359	\$42,998	\$639	1.5%	0.3%
Hillsborough County	\$47,677	\$50,226	\$2,549	5.3%	1.0%
MSA	\$45,104	\$46,755	\$1,651	3.7%	0.7%
Florida	\$44,409	\$47,643	\$3,234	7.3%	1.8%

NOTE: NO DATA AVAILABLE PRIOR TO 2015 FOR STUDY AREAS.

Figure 3.16 reveals the median household income by census block group within the Planning Study Area. The most well-off census block groups within the Planning Study Area are east of N 56th Street. The census block groups with the lowest median household income area are west of Bruce B Downs Boulevard and north of University Mall along I-275.

Vehicle Access

The availability of a vehicle in area households is important to examine because it has many impacts on the region. It affects the amount of traffic congestion, the safety and comfort of the pedestrian and cyclist experience, and the ability of area households to access goods and services. Within the Planning Study Area, a majority of households have one or two vehicles with 74.8 percent of owner-occupied and renter-occupied households. In the Innovation District Core, 71.3 percent of households have one or two vehicles. 22.1 percent of households in the Innovation District Core and 15.6 percent of households in the Planning Study Area have no vehicles. The amount of households with one or two vehicles in Hillsborough County is higher with 79.5 percent of all County households. Alternatively, the County also has a smaller amount of households having no vehicles with only 7 percent. Figure 3.17 shows the amount of households per census block group that has no vehicles within the Planning Study Area.

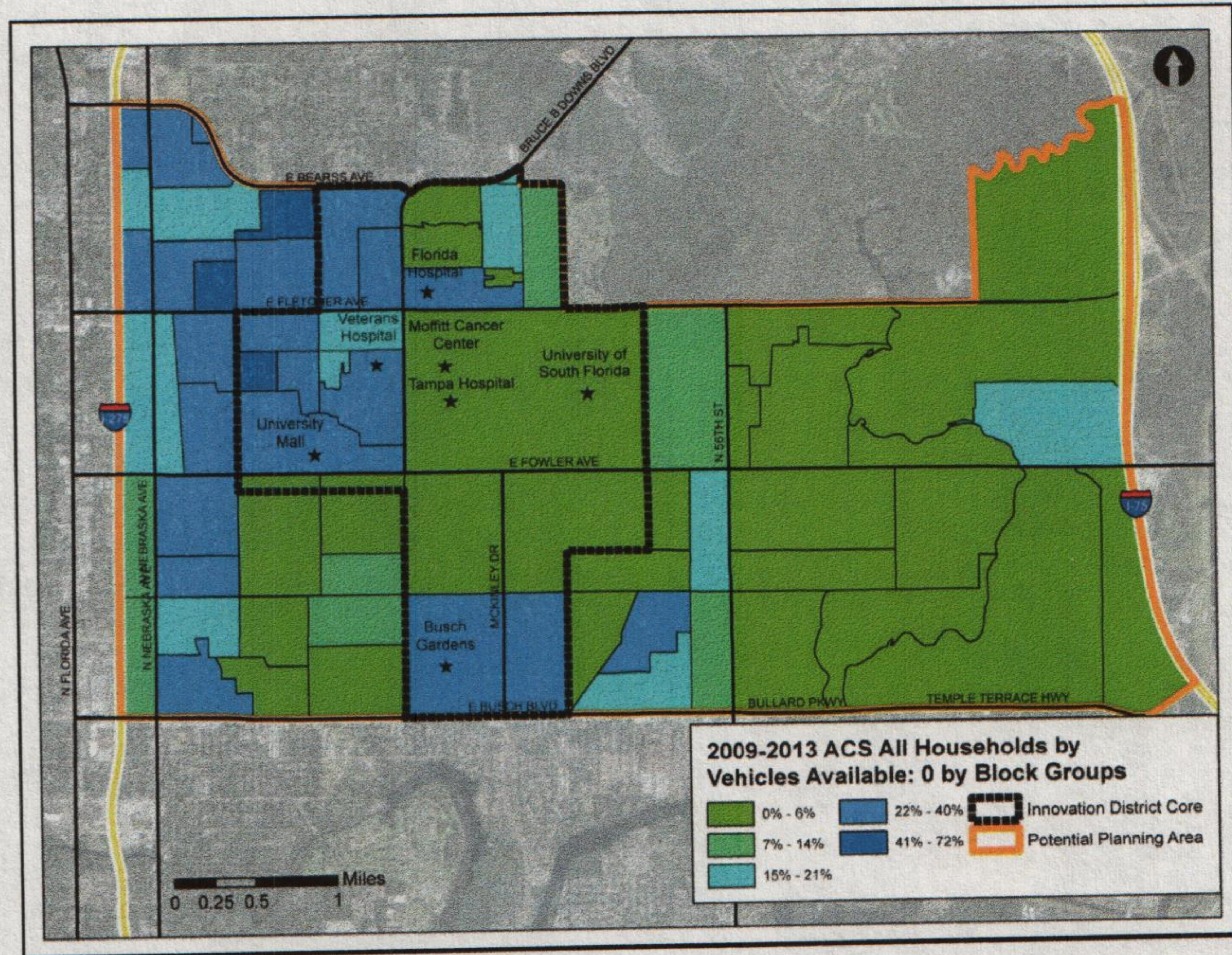


FIGURE 3.17
NUMBER OF HOUSEHOLDS WITHOUT VEHICLES BY CENSUS BLOCK GROUP
WITHIN THE PLANNING STUDY AREA, 2009-2013 ACS
 SOURCE: ESRI; AECOM, 2015.

Business and Employment

Labor Market

Unemployment Rate

An important indicator of a local economy's performance is the unemployment rate. Since historical unemployment data could not be obtained for the Planning Study Area or Innovation District Core, this analysis focuses on the unemployment rates of the City of Tampa, Hillsborough County, and the Tampa-St. Petersburg-Clearwater, FL MSA. Since the Planning Study Area and Innovation District Core are both within the City of Tampa, Tampa's historical unemployment rates will be used to measure the unemployment of the study area. Figure 3.18 shows the historical quarterly unemployment rates for Tampa, Hillsborough and the Tampa MSA from 2000 to 2015. Prior to the 2001 recession, Tampa has always had a higher rate of unemployment than the County and MSA. The highest unemployment rates experienced during the 2001 recession were 7.1 percent, 5.7 percent, and 5.8 percent for Tampa, Hillsborough, and the MSA respectively. Ever since the recovery from the 2001 recession, the three jurisdictions have had very similar unemployment rates, even during the 2008 recession. In Q1 of 2008, Tampa, Hillsborough, and the MSA had unemployment rates of 5.1 percent, 4.3 percent, and 4.5 percent. At the worst, in Q4 of 2009,

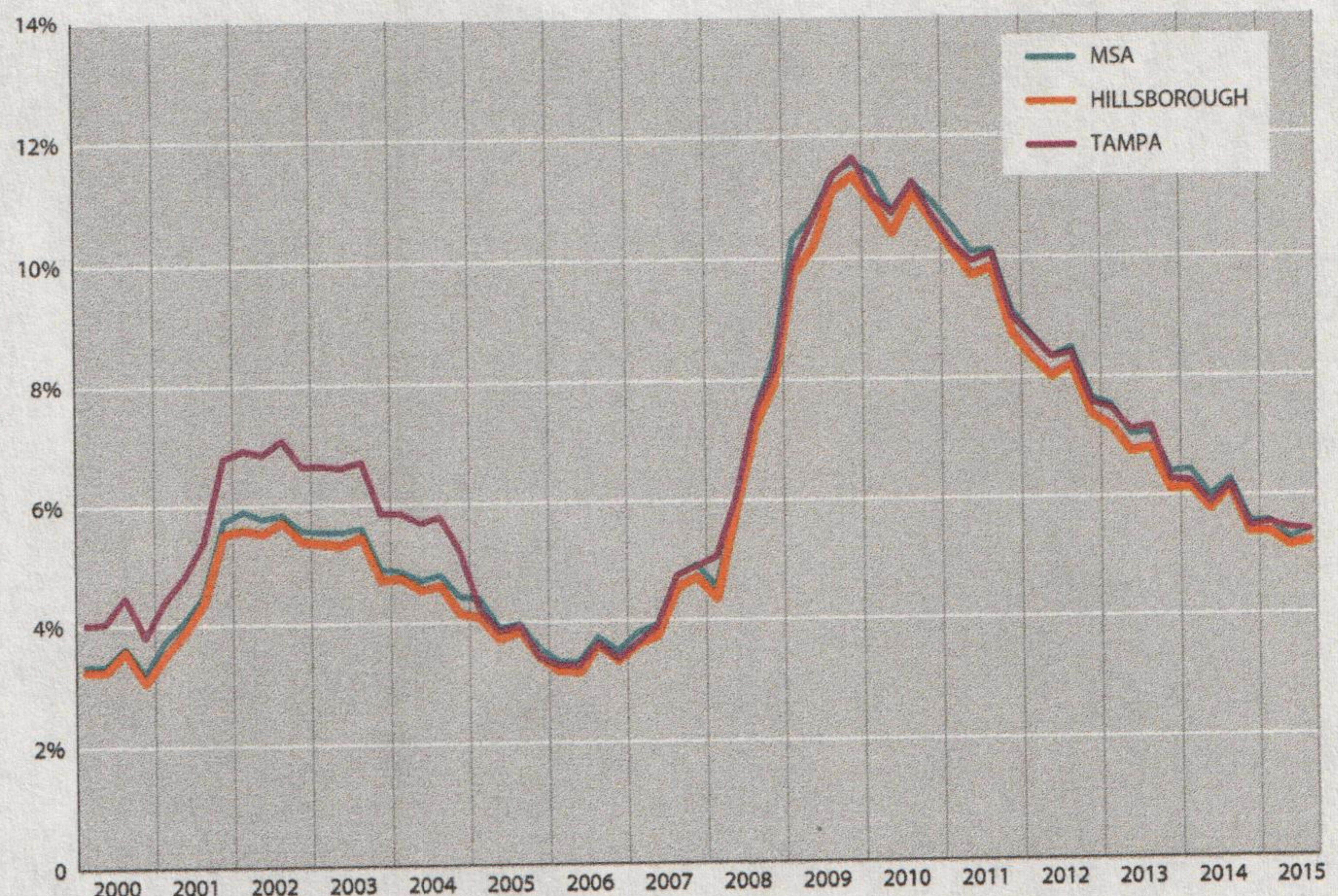


FIGURE 3.18
HISTORICAL QUARTERLY UNEMPLOYMENT RATES FROM Q1 2000 TO Q3 2015
SOURCE: FEDERAL RESERVE ECONOMIC DATA; AECOM, 2015.

Tampa Hillsborough, and the MSA experienced unemployment rates of 11.6 percent, 11.3 percent, and 11.6 percent. This region, much like the rest of Florida, was hit hard by the 2008 recession with the amount of development occurring and the housing bubble. The recovery has been slow and steady for the region. Currently in Q3 of 2015, Tampa has an unemployment rate of 5.4 percent, Hillsborough's unemployment is 5.2 percent, and the MSA has an unemployment rate of 5.4 percent. These rates are comparable to unemployment rates during the early 2000s recession and appear to be plateauing. These unemployment rates are relatively normal given the nature of today's modern technology and services-based economy. Improvements and growth in technology and services will continue to increase employment for the region.

Poverty Rate

The poverty rate is another indicator of how an economy is performing. Historical poverty rates from the Census were observed from 2010 to 2014. As seen in Figure 3.19, the Innovation Core and Planning Study Area have both had significantly higher levels of poverty than Tampa, Hillsborough County, and the Tampa-St. Petersburg-Clearwater, FL MSA. In 2010, both the Innovation Core and Planning Study Area had poverty rates of at least 10 percentage points higher than the County. 2012 was the worst year

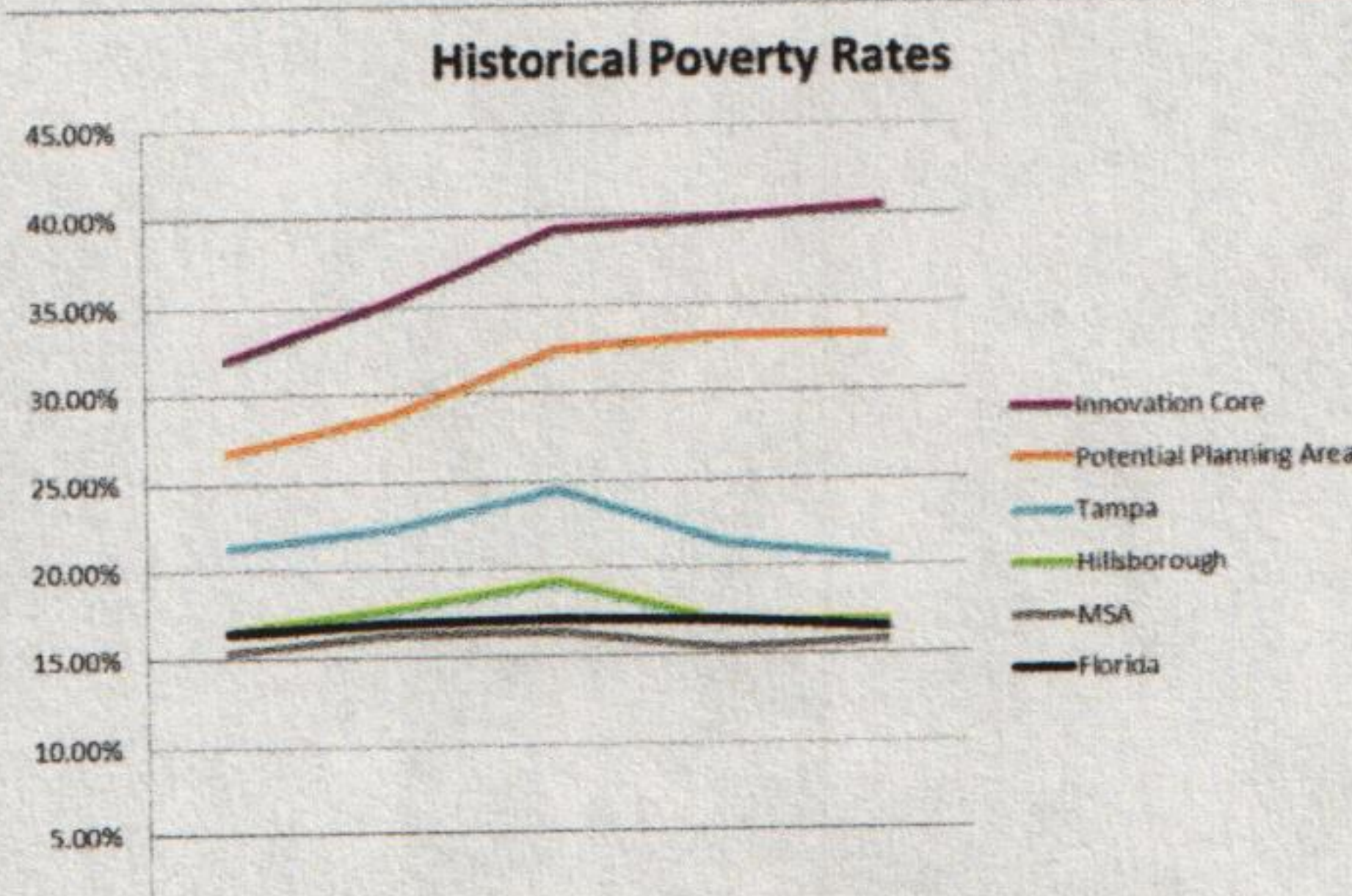


FIGURE 3.19 HISTORICAL POVERTY RATES FROM 2005 TO 2014

SOURCE: US CENSUS BUREAU; AECOM, 2015.

for the City, the County, and the MSA with Tampa recording a 24.5 percent poverty rate, Hillsborough 19.2 percent, and the MSA with 16.4 percent. While poverty rates have been declining for the City, County, and MSA, they continue to increase in both the Innovation Core and the Planning Study Area. These high poverty rates for the Planning Study Area and Innovation Core can be attributed to a number of factors. For example, college students tend to be lower income since many do not work while they are in school, and a lot of students tend to reside nearby so they can walk or bike to class. Another reason poverty rates are high in this area is the presence of affordable/low-income housing in the area.

Industry Concentration

Location quotients are important for understanding the local economy and labor force. They provide the share of a specific industry's employment within a region relative to the larger region. The location quotients in this analysis compare industry employment in the Planning Study Area to industry employment in the Tampa-St. Petersburg-Clearwater, FL MSA. Location quotients are presented as integers and reveal if the industry is basic or non-basic. Location quotients less than one are non-basic, and location quotients greater than one are basic. If an industry is basic, it means there is a higher concentration of employment in this industry than in the larger geography. Within the Planning Study Area, there are three basic industries: Information, Educational Services, and Health Care and Social Assistance. A complete list of location quotients can be seen in Figure 3.20. The results of this location quotient analysis are supported by the presence of USF and the numerous medical institutions within the Planning Study Area.

The least basic industries in the area are Mining, Utilities, and Agriculture. These findings are supported by the land uses within the Planning Study Area. It is important to note that certain industries that were assumed to be basic were found to be non-basic. These industries that fell short of

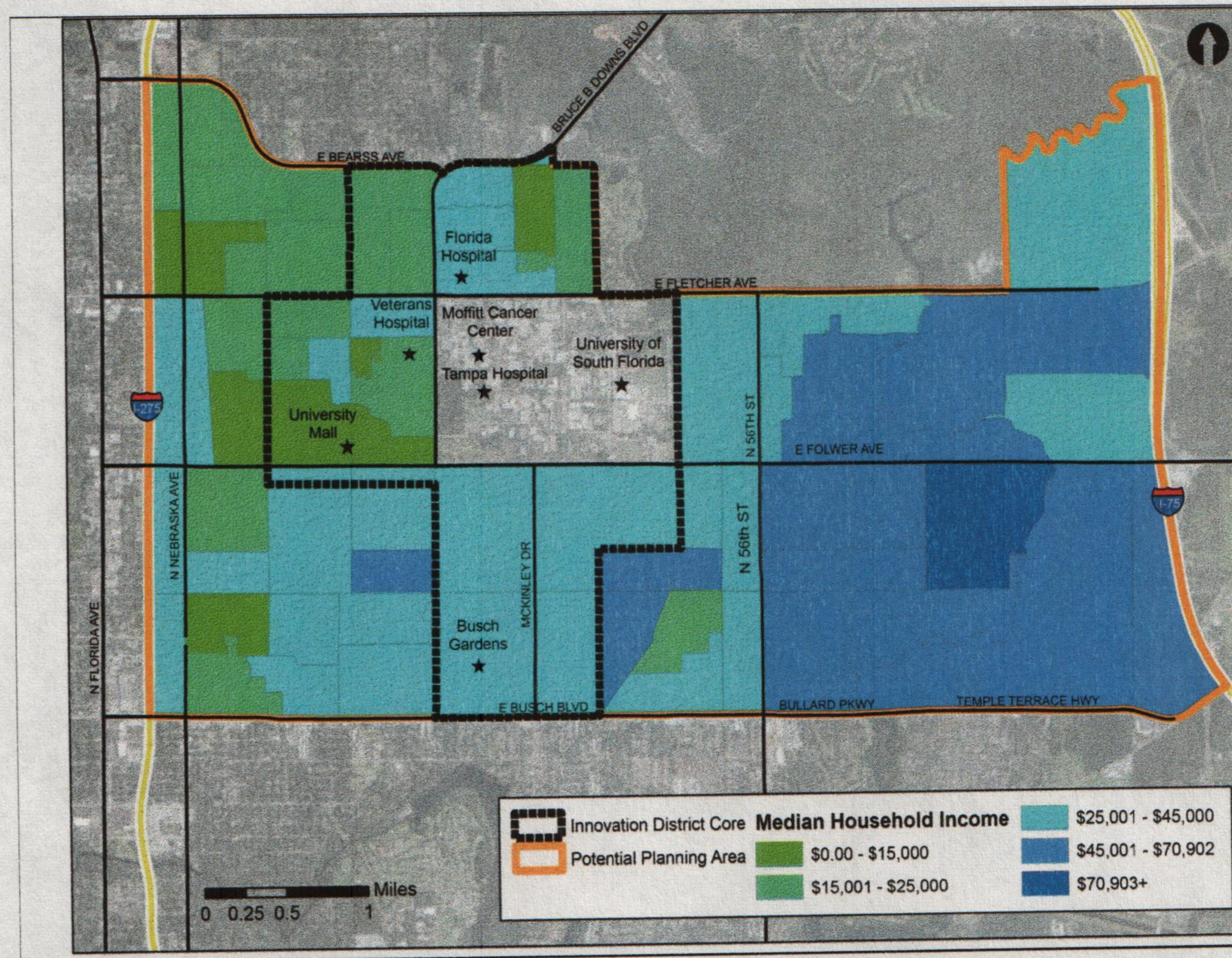


FIGURE 3.16
MEDIAN HOUSEHOLD
INCOME BY CENSUS BLOCK
GROUP WITHIN THE
PLANNING STUDY AREA,
2010
 SOURCE: ESRI; AECOM, 2015.

expectations are: Manufacturing, Retail Trade, and Accommodation and Food Services.

Figure 3.21 shows location quotients of the Planning Study Area compared to the MSA and relative employment strength. The size of the bubbles in this chart coincides with the amount of employment in each industry. For example, Health Care has a large bubble because there are over 17,900 people employed in the health care industry within the Planning Study Area out of a total area employment of 56,053, which is 32.08% of all employment in the area. As the bubbles become larger, their share of employment becomes greater. As bubbles move up along the y-axis, they become more basic and vice versa. As bubbles move to the right of the x-axis, the industry grows, and as it moves to the left of the x-axis the industry shrinks. This chart was created by comparing the location quotients of major industries from 2002 to 2013. Health Care, Professional and Business Services, Manufacturing, and Wholesale Trade have grown the most during this time. During this time, Educational Services as an employment industry has contracted in size, but has still maintained a large share of local employment. This can be explained by the State University System of Florida's budget cuts in more recent years, which inevitably led to some downsizing across all public universities in the State of Florida.

FIGURE 3.20 LOCATION QUOTIENTS OF THE PLANNING STUDY AREA AGAINST THE MSA AND THE USA, 2015

INDUSTRY	PLANNING STUDY AREA (AGAINST MSA)	PLANNING STUDY AREA (AGAINST USA)
Agriculture	0.05	0.04
Mining	0.00	0.00
Utilities	0.01	0.01
Construction	0.58	0.42
Manufacturing	0.90	0.45
Wholesale Trade	0.49	0.79
Retail Trade	0.87	0.95
Transportation and Warehousing	0.07	0.04
Information	2.44	2.43
Finance and Insurance	0.38	0.49
Real Estate	0.50	0.54
Professional, Scientific, and Technical Services	0.86	1.03
Management of Companies and Enterprises	0.34	2.14
Administration and Support, Waste Management, and Remediation	0.62	1.07
Educational Services	1.87	1.58
Health Care and Social Assistance	2.11	2.34
Arts, Entertainment, and Recreation	0.59	0.50
Accommodation and Food Services	0.82	1.09
Other Services (excluding Public Administration)	0.47	0.28
Public Administration	0.31	0.27

SOURCE: US CENSUS, 2015
NOTE: USES MSA EMPLOYMENT NUMBERS AS DENOMINATOR

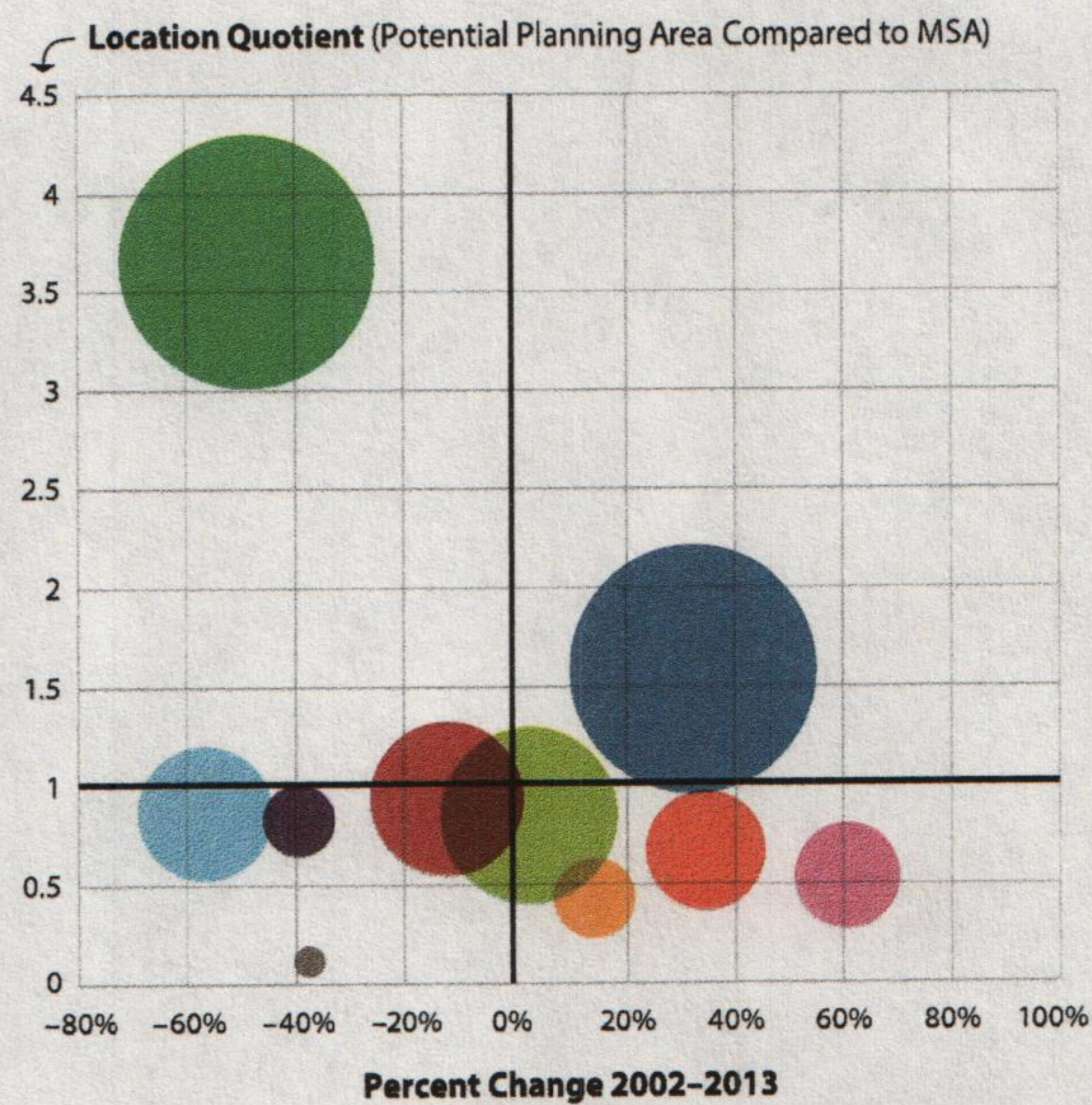


FIGURE 3.21 CHANGE IN LOCATION QUOTIENTS OF THE PLANNING STUDY AREA FROM 2002 TO 2013
 SOURCE: US CENSUS BUREAU; AECOM, 2015.

Major Employers

Hillsborough County's 2015 Local Mitigation Strategy provides a list of the top 20 employers of the County. These 20 employers combined account for 22.2 percent of all employment in Hillsborough County. Figure 3.22 shows a complete list of the major employers identified by Hillsborough County. The top five employers in the County are all local, state, or federal government entities. Hillsborough County's dominant employer is Hillsborough County School District with over 25,000 employees. With Over 16,500 employees, USF is the second largest employer in the County. The Innovation District has an inherent advantage with five of the top 20 employers locating their primary business operations in the district: USF, H. Lee Moffitt Cancer Center, James A Haley VA Medical Center, Busch Gardens, and Florida Hospital Tampa. More than half of the top 20 employers have a presence within the Planning Study Area: Hillsborough County School District, USF, Hillsborough County Government, Publix Supermarkets, City of Tampa, H. Lee Moffitt Cancer Center, James A. Haley VA Medical Center, Busch Gardens, Sweetbay/Winn-Dixie, Florida Hospital Tampa, Casper's Company, and TECO Energy.

EMPLOYER	EMPLOYEES	PERCENT OF COUNTY	RANK IN INNOVATION DISTRICT	RANK IN COUNTY
Hillsborough County School District	25,776	30.8%	1	1
University of South Florida	16,693	20.0%	2	2
Hillsborough County Government	9,707	11.6%	3	4
Publix Supermarkets	7,156	8.6%	4	6
City of Tampa	4,406	5.3%	5	10
H. Lee Moffitt Cancer Center	4,300	5.1%	6	11
James A. Haley VA Medical Center	4,240	5.1%	7	12
Busch Gardens	3,800	4.5%	8	14
Sweetbay/Winn-Dixie	2,800	3.4%	9	16
Florida Hospital	2,500	2.9%	10	17
TECO Energy	2,300	2.8%	11	20
Total	83,678	100%		

FIGURE 3.22 TOP EMPLOYERS OF HILLSBOROUGH COUNTY IN THE INNOVATION DISTRICT
 SOURCE: HILLSBOROUGH COUNTY LOCAL MITIGATION STRATEGY, SECTION 2, PROFILE OF HILLSBOROUGH COUNTY, 2015.

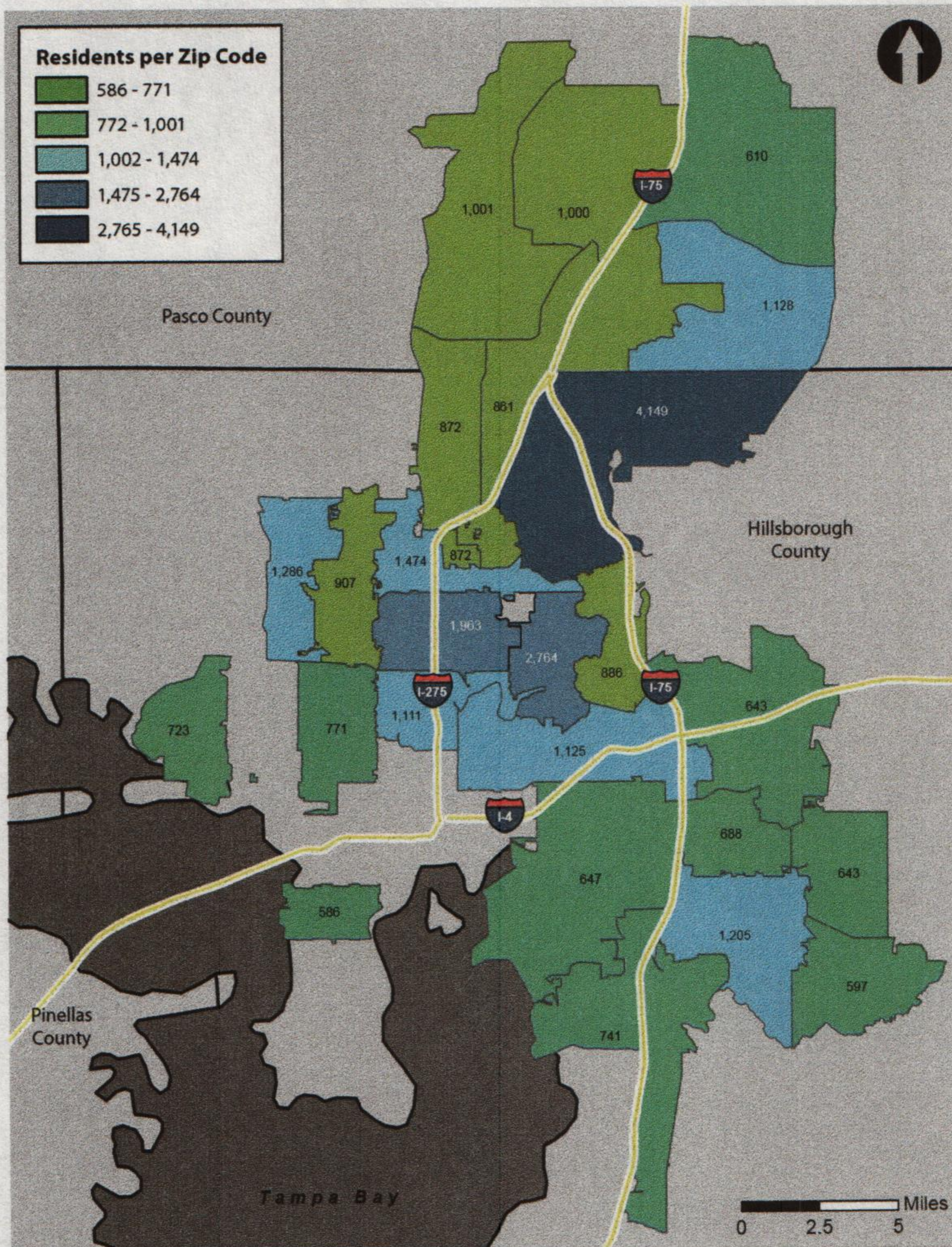


FIGURE 3.23
NUMBER OF PLANNING STUDY AREA EMPLOYEES RESIDING
IN THEIR RESPECTIVE ZIP CODES

SOURCE: US CENSUS BUREAU; AECOM 2015.

Commuter Shed

With twelve of the top 20 employers having locations or a major presence in the Planning Study Area, it is important to understand where people who work in the study area live. Figure 3.23 shows where people who work in the Planning Study Area live by zip code. The numbers in each zip code polygon represent the amount of people residing in each zip code that also works in the study area. A majority of people who work in the Planning Study Area live in the zip code 33647, which is the New Tampa area. Over 4,100 Planning Study Area employees live here. The second most common zip code among area employees is 33617, which falls within the Planning Study Area. The three jurisdictions that share this portion of employees are Temple Terrace, Tampa, and Hillsborough County with a majority in Temple Terrace. This area is home to over 2,700 Planning Study Area employees. The third largest zip code in terms of Planning Study Area employees is 33612, which falls in Tampa and Hillsborough County. This zip code also has a major portion also falling within the Planning Study Area. Over 1,900 employees call this zip code home. While the most densely populated zip codes fall within Hillsborough County, there is a large amount of Planning Study Area employees that reside in Pasco County. Over 3,700 people who work in the Planning Study Area live in southern Pasco County. Alternatively, over 24,500 Planning Study Area employees live in Hillsborough County.

FIGURE 3.24
NUMBER OF BUSINESSES BY INDUSTRY IN THE PLANNING STUDY AREA

SOURCE: US CENSUS BUREAU; AECOM, 2015.

NAICS	QUANTITY	PERCENT	NAICS	QUANTITY	PERCENT
Agriculture, Forestry, Fishing & Hunting	2	0.10%	Securities, Commodity Contracts/Other Financial Investments/Other Related Activities	24	0.70%
Mining	0	0.00%	Insurance Carriers & Related Activities; Funds, Trusts & Other Financial Vehicles	51	1.50%
Utilities	1	0.00%	Real Estate, Rental & Leasing	300	8.70%
Construction	198	5.70%	Professional, Scientific & Tech Services	262	7.60%
Manufacturing	61	1.80%	Legal Services	39	1.10%
Wholesale Trade	80	2.30%	Management of Companies & Enterprises	1	0.00%
Retail Trade	608	17.60%	Administrative & Support & Waste Management & Remediation Services	151	4.40%
Motor Vehicle & Parts Dealers	66	1.90%	Educational Services	88	2.50%
Furniture & Home Furnishings Stores	26	0.80%	Health Care & Social Assistance	413	11.90%
Electronics & Appliance Stores	39	1.10%	Arts, Entertainment & Recreation	59	1.70%
Bldg Materials, Garden Equipment & Supplies Dealers	33	1.00%	Accommodation & Food Services	299	8.60%
Food & Beverage Stores	82	2.40%	Accommodation	33	1.00%
Health & Personal Care Stores	77	2.20%	Food Services & Drinking Places	266	7.70%
Gasoline Stations	31	0.90%	Other Services (except Public Administration)	402	11.60%
Clothing & Clothing Accessories Stores	111	3.20%	Automotive Repair & Maintenance	90	2.60%
Sport Goods, Hobby, Book, & Music Stores	25	0.70%	Public Administration	38	1.10%
General Merchandise Stores	32	0.90%	Unclassified Establishments	138	4.00%
Miscellaneous Store Retailers	74	2.10%			
Non-store Retailers	14	0.40%	Total	3,459	100.0%
Transportation & Warehousing	36	1.00%			
Information	71	2.10%			
Finance & Insurance	251	7.30%			
Central Bank/Credit Intermediation & Related Activities	177	5.10%			

Area Businesses by Industry

Figure 3.24 shows a complete breakdown of the number of businesses within the Planning Study Area by industry. The greatest concentration of businesses is within the Retail Trade industry with a total of 608 businesses. The top three retail trade business types are clothing and clothing accessory stores, food and beverage stores, and health and personal care stores. The second largest industry by number of businesses is Health Care and Social Assistance with 413 businesses.

The Retail Trade and Health Care and Social Assistance industries account for 29.5 percent of all businesses within the Planning Study Area. The only industry with no businesses existing within the Planning Study Area is Mining.

Real Estate Market Overview

Values

This analysis looks at the value per square foot of all parcels in the study area and greater geographic jurisdictions in which the study area falls using data from the Hillsborough County Property Appraiser. To obtain the value per square foot, the building value was divided by the heated area, or square footage of buildings that are heated and cooled. This method was chosen over using land values to generate the largest range of values possible. Of the 21,000+ parcels included in this analysis, over 5,000 parcels were recorded having zero acres, and would give a value of \$0 per square foot. Less than 1,500 parcels had no buildings, which provided more

FIGURE 3.25 MEDIAN BUILDING VALUE PER SQUARE FOOT, 2015

SOURCE: HILLSBOROUGH COUNTY PROPERTY APPRAISER, 2015

AREA	MEDIAN
Innovation District Core	\$38.04
Planning Study Area	\$37.18
Tampa	\$42.50
Hillsborough County	\$48.39

data and parcels to analyze and better understand valuations within the Planning Study Area. Figure 3.25 shows the median value per square foot of each geographic region observed. The Innovation District Core and Planning Study Area have similar median value per square foot with only a \$1.52 difference. Similarly, Tampa and Hillsborough County have comparable median value per square foot with a difference of \$0.84. The median value per square foot of the Planning Study Area and Innovation District Core are significantly less than those values of Tampa and Hillsborough County. There is a \$10.35 difference in median value per square foot between Hillsborough County and the Innovation District Core. The difference in median value per square foot between the Planning Study Area and Hillsborough County is \$10.91.

Figure 3.26 shows a map of building value per square foot of the Planning Study Area. This map shows a majority of buildings have a value per square foot between \$25.01 to \$33 and \$44.01 to \$41. The block of parcels south of University Mall and west of Busch Gardens is a residential neighborhood with most parcels having buildings falling into the \$10.01 to \$25 and \$25.01 to \$33 value per square foot ranges. The group of parcels south of E Fowler Avenue between N 56th Street and the Hillsborough River mostly has building value per square foot ranges of \$41.01 to \$52, \$52.01 to \$65, and \$65.01 to \$93. These parcels are a residential neighborhood in Temple Terrace. The group of parcels between Busch Gardens and N 56th Street and below the larger parcels south of E Fowler Avenue is a residential neighborhood with a mix of buildings valued between \$0 to \$10 per square foot and \$10.01 to \$25 per square foot, with few parcels in the \$33.01 to \$41 per square foot range. The parcels with the highest building value per square foot are H Lee Moffitt Cancer Center, First Florida Bank in Temple Terrace, and SunTrust Bank in Tampa, which all have building values per square foot of over \$200.

Commercial Real Estate Market

To determine the existing conditions that will later inform near-term development potential, a comparison of commercial real estate performance in the Planning Study Area and Innovation District Core was made to the surrounding area.

Office

Looking at the Rentable Building Area (RBA) of the office market can indicate historic demand within the study area. Figure 3.27 shows RBA in square feet from 2010 to 2014. From 2010 to 2014, there has been no change in RBA within the Innovation District Core, which means no new office space has been developed nor has there been a decrease in the amount of rentable office space. The Planning Study Area has had a very slow decrease in RBA over the last five years. From 2011 to 2013, RBA was relatively stable in the Planning Study Area, and had a minimal decrease of less than 61,000 square feet between 2013 and 2014. Hillsborough County's office RBA has steadily increased from 2010 to 2013 and then decreased from 2013 to 2014 by 138,219 square feet. The Tampa-St. Petersburg-Clearwater, FL MSA has observed constant increases in office RBA, which means the entire metropolitan area has experienced growth in office space.

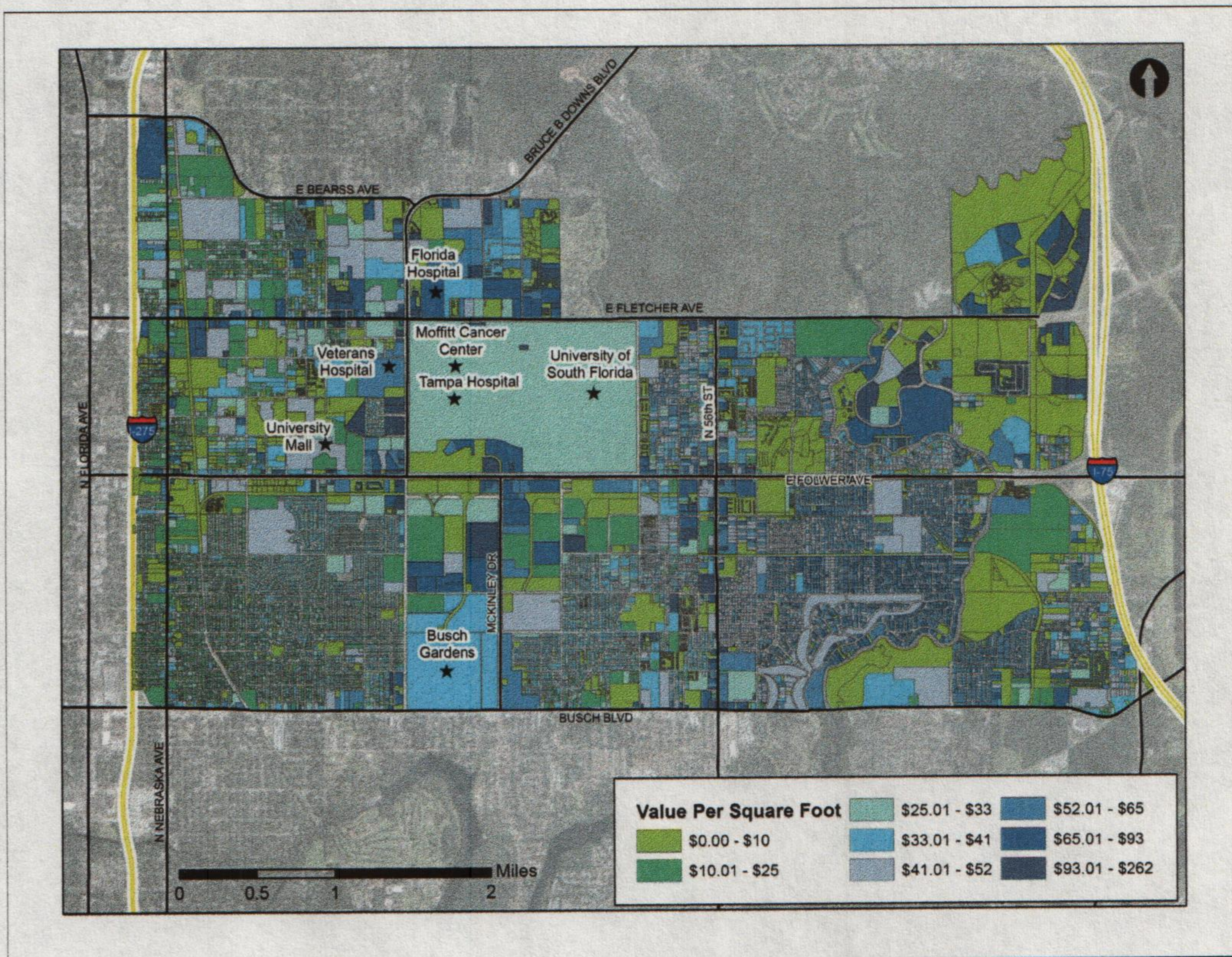


FIGURE 3.26
PARCEL VALUE PER SQUARE
FOOT WITHIN THE PLANNING
STUDY AREA, 2015

SOURCE: HILLSBOROUGH COUNTY
 PROPERTY APPRAISER; AECOM, 2015.

The average Annual Direct Vacancy Rate shows the percentage of vacant or available square footage. The Innovation District Core has always had the lowest vacancy rates from 2010 to 2014. The Planning Study Area has the highest vacancy rates of all geographic areas observed in this analysis. Figure 3.28 shows a 17.2 percent vacancy rate in 2012, which is the largest experienced by any of the geographies from 2010 to 2014. Tampa, Hillsborough County, and the MSA all have similar average annual direct vacancy rates. When comparing to the City, County, and MSA, the Innovation District Core outperforms in terms of office space usage.

In 2014 direct net absorption (in other words, the number of square feet leased or vacated—a positive number indicates more space leased than not leased and a negative number indicates more space vacated than leased) was a negative 6,116 square feet in the Innovation District Core. On average, this area has experienced a negative direct net absorption from 2010 to 2014. (This does not include sublet space; as an indicator, it is important as an indicator of potential leasing of new space). The Planning Study Area has on average had a positive absorption—but of a minimal amount at 5,967 square feet per year. More years between 2010 and 2015 had negative absorption than had positive absorption. For the most part, this does not reflect a trend in the surrounding region—the City, County, and MSA have had positive absorption on average.

Office rents are very similar across all geographic areas in this analysis. The difference between the lowest average annual gross direct rent and the highest is only \$2.21. Office rents are the highest in the Planning Study Area, but only by \$0.55. Office rents, for the most part, have remained relatively stable within each geographic area between 2010 and 2014 with only minor increases and decreases.

**FIGURE 3.27
OFFICE RENTABLE
BUILDING SQUARE
FOOTAGE FROM 2010
TO 4Q 2014**

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	1,646,416	1,646,416	1,646,416	1,646,416	1,646,416	1,646,416
Planning Study Area	5,593,125	5,585,765	5,585,765	5,585,765	5,585,765	5,587,237
Tampa	55,979,877	55,976,575	56,077,733	56,309,841	56,161,594	56,101,124
Hillsborough County	63,629,024	63,636,422	63,767,580	64,000,957	63,862,738	63,779,344
Tampa MSA	113,349,788	155,390,933	155,627,742	155,974,797	156,209,313	147,310,515

SOURCE: COSTAR PROPERTY; AECOM, 2015

**FIGURE 3.28
OFFICE AVERAGE
ANNUAL DIRECT
VACANCY RATE FROM
2010 TO 2014**

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	8.7%	10.5%	13.8%	12.8%	12.0%	11.5%
Planning Study Area	16.9%	16.8%	17.2%	15.4%	17.1%	16.7%
Tampa	14.8%	14.8%	13.9%	13.1%	12.2%	13.7%
Hillsborough County	14.4%	14.3%	13.8%	13.1%	12.1%	13.5%
Tampa MSA	13.9%	13.8%	13.6%	13.3%	12.4%	13.4%

SOURCE: COSTAR PROPERTY; AECOM, 2015

**FIGURE 3.29
OFFICE ANNUAL
TOTAL DIRECT NET
ABSORPTION (SQ. FT.)**

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	30,566	(58,974)	(39,177)	33,351	(6,116)	(8,070)
Planning Study Area	123,842	(102,045)	(35,497)	152,100	(108,565)	5,967
Tampa	135,308	261,461	419,089	657,804	558,337	406,400
Hillsborough County	438,266	159,211	281,326	764,713	699,049	468,513
Tampa MSA	477,980	273,830	(117,081)	1,374,829	1,441,944	690,300

SOURCE: COSTAR PROPERTY; AECOM, 2015

**FIGURE 3.30
OFFICE AVERAGE
ANNUAL GROSS RENT
DIRECT FROM 2010 TO
2014**

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	\$20.80	\$20.13	\$19.48	\$19.47	\$20.51	\$20.08
Planning Study Area	\$21.74	\$21.48	\$21.04	\$20.61	\$21.02	\$21.18
Tampa	\$21.13	\$20.73	\$20.32	\$20.20	\$20.75	\$20.63
Hillsborough County	\$20.94	\$20.49	\$20.07	\$19.95	\$20.47	\$20.38
Tampa MSA	\$19.71	\$19.21	\$18.59	\$18.42	\$18.91	\$18.97

SOURCE: COSTAR PROPERTY; AECOM, 2015

Retail

As of the end of 2014 there were 5.6 million square feet of retail space in the Planning Study Area, 1.6 of them in the Innovation District Core. This represents 4.9 percent of the 114 million square feet in the MSA. Over the last five years, there has been a reduction of rentable building area (see Figure 3.31).

The reduction in RBA appears to have positively impacted vacancy rates in both the Innovation District Core and the Planning Study Area, which respectively went from a highs of 10.8 percent in 2012 and 8.6 percent in 2010 to the year-end 2014 rates of 7.5 percent and 6.9 percent, lower than their average annual vacancy rates over the last five years. This reduction has brought the vacancy rates closer to that of Tampa, Hillsborough County, and the MSA, though they remain higher than all of these geographies, by as much as 1.9 percent when comparing the Innovation District Core to Hillsborough County.

On average from 2010 to 2014, the Innovation District Core had 9,344 square feet of annual direct net absorption. However, in the last two years, the area experienced negative absorption—14,137 square feet in 2014. The Planning Study Area has averaged 40,278 square feet per year from 2010 to 2014, and had positive absorption of 36,347 square feet in 2014 after a negative absorption of 61,503 square feet in 2013.

Average annual retail rents have remained fairly steady in all geographies examined over the last five years and the Innovation District Core has rental rates comparable to that of Tampa and Hillsborough County. However, the Planning Study Area has on average rents that are approximately \$2.60 lower than those areas. The MSA's average rent is slightly lower at \$13.90 compared to \$14.80 at the end of 2014 for the Innovation District Core. All areas were below their peak average annual rental rates in 2014. Generally, these rents are fairly low, but reflect the varied nature of the retail stock—where older space can rent for less than \$10 per square foot and newer space can achieve as much as \$90 per square foot.

**FIGURE 3.31
RETAIL RENTABLE BUILDING SQUARE FOOTAGE FROM 2010 TO 4Q 2014**

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	2,808,699	2,815,412	2,793,581	2,804,625	1,646,416	2,573,747
Planning Study Area	6,761,347	6,766,044	6,760,033	6,771,077	5,585,765	6,528,853
Tampa	47,990,180	48,043,031	48,126,179	48,177,784	56,161,594	49,699,754
Hillsborough County	68,721,615	68,971,174	69,124,724	69,253,820	63,862,738	67,986,814
Tampa MSA	154,844,217	155,390,933	155,627,742	155,974,797	114,104,353	147,188,408

SOURCE: COSTAR PROPERTY; AECOM, 2015

Ron Pierce

Industrial

As of the end of 2014, there were approximately 3.8 million square feet of industrial space in the Planning Study Area. Approximately two-thirds of the space was in the Innovation District Core. The 3.8 million square feet represents 2.4 percent of the MSA's industrial space. There has not been a significant change in building area over the last five years, but in general, there has been slight decrease in space. The amount of space in the Innovation District Core has remained the same over the five-year period between 2010 and 2014. Though there has been a general decrease in overall industrial space in Tampa, Hillsborough County, and the Tampa MSA, it is likely the removal of redundant older space from the market, because there was an average of 418,000 square feet delivered annually in the MSA over this period of time.

Industrial vacancy rates in all the geographies analyzed are down from their peaks within the last five year period. For the larger areas (Tampa, Hillsborough County, and the MSA, this was in 2010. The MSA recovered by reducing its industrial vacancy rates by 2.5 percent. This can be in part due to the decrease in RBA. The Planning Study Area's 2014 average annual direct vacancy rate was 1.1 percent lower than its peak in 2011, and the Innovation District Core was 0.85 percent less than its peak in 2011 and 2012.

FIGURE 3.32 RETAIL AVERAGE ANNUAL DIRECT VACANCY RATE FROM 2010 TO 2014

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	10.0%	9.1%	10.8%	7.2%	7.5%	8.9%
Planning Study Area	8.6%	7.2%	7.4%	6.7%	6.9%	7.4%
Tampa	6.9%	6.7%	6.4%	6.6%	6.0%	6.5%
Hillsborough County	7.0%	6.8%	6.3%	6.2%	5.6%	6.4%
Tampa MSA	7.8%	7.5%	7.0%	7.0%	6.2%	7.1%

SOURCE: COSTAR PROPERTY; AECOM, 2015

FIGURE 3.33 RETAIL ANNUAL TOTAL DIRECT NET ABSORPTION (SQ. FT.)

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	19,079	(3,200)	46,369	(1,393)	(14,137)	9,344
Planning Study Area	143,640	1,685	80,922	(61,503)	36,647	40,278
Tampa	(12,064)	235,035	100,571	(31,609)	447,661	147,919
Hillsborough County	125,218	501,933	253,797	247,731	701,138	365,963
Tampa MSA	206,586	1,446,893	220,243	854,090	1,616,753	868,913

SOURCE: COSTAR PROPERTY; AECOM, 2015

FIGURE 3.34 RETAIL AVERAGE ANNUAL DIRECT RENT FROM 2010 TO 2014

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	\$14.73	\$14.40	\$14.63	\$15.49	\$14.80	\$14.81
Planning Study Area	\$12.73	\$12.53	\$12.90	\$12.84	\$11.67	\$12.53
Tampa	\$15.25	\$14.15	\$14.66	\$14.92	\$14.30	\$14.66
Hillsborough County	\$15.32	\$14.43	\$14.46	\$14.69	\$14.28	\$14.63
Tampa MSA	\$14.41	\$13.60	\$13.72	\$13.92	\$13.90	\$13.91

SOURCE: COSTAR PROPERTY; AECOM, 2015

FIGURE 3.35 INDUSTRIAL RENTABLE BUILDING AREA FROM 2010 TO 2014

	INDUSTRIAL RENTABLE BUILDING AREA AS OF 4Q (SQ. FT.)					Avg Annual
	2010	2011	2012	2013	2014	
Innovation District Core	2,512,794	2,512,794	2,512,794	2,512,794	2,512,794	2,512,794
Planning Study Area	3,817,283	3,817,283	3,817,283	3,809,278	3,809,278	3,814,081
Tampa	72,615,118	72,264,607	71,734,395	70,956,704	70,945,022	71,703,169
Hillsborough County	88,344,722	87,979,961	87,220,547	86,442,856	87,607,010	87,519,019
Tampa MSA	159,994,327	159,733,529	158,834,159	158,148,250	159,460,127	159,234,078

SOURCE: COSTAR PROPERTY; AECOM, 2015

The Innovation District Core has not had a particularly strong direct net absorption in the last five years—averaging only 1,932 square feet absorbed. The larger Planning Study Area, like the City of Tampa, had a negative average absorption. Negative absorption indicates that more space is being vacated than is being leased.

The negative absorption in the most recent full calendar year available at the time of this report (2014) indicates low leasing activity, and this is also reflected in rents, particularly in the Innovation District Core. Data are not available for industrial rents for 2014, which could indicate a lack of space being leased. This lack of leasing, however, does not appear to be a function of inflated rents. Average annual direct rent in the Innovation District Core is low—in year end 2013 (last year for which data was available), the rent was \$3.83 per square foot. In the same year, industrial rents in Tampa, Hillsborough County, and the MSA exceeded this by less than a dollar per square foot. However, the Planning Study Area had per square foot rents of \$7.73 in 2013 and \$8.12 in 2014, suggesting a stronger industrial market.

FIGURE 3.36 INDUSTRIAL AVERAGE ANNUAL DIRECT VACANCY RATE FROM 2010 TO 2014

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	7.93%	8.60%	8.60%	6.83%	7.75%	7.94%
Planning Study Area	6.60%	8.28%	8.00%	6.60%	7.18%	7.33%
Tampa	10.43%	9.25%	9.78%	9.63%	8.85%	9.59%
Hillsborough County	10.63%	9.53%	9.53%	9.30%	8.50%	9.50%
Tampa MSA	9.95%	9.38%	9.20%	8.58%	7.48%	8.92%

SOURCE: COSTAR PROPERTY; AECOM, 2015

FIGURE 3.37 INDUSTRIAL ANNUAL TOTAL DIRECT NET ABSORPTION (SQ. FT.)

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	8,151	(12,800)	0	58,360	(44,050)	1,932
Planning Study Area	(30,225)	(55,823)	30,215	58,355	(40,337)	(7,563)
Tampa	(138,183)	610,325	(1,083,877)	(197,370)	547,816	(52,258)
Hillsborough County	180,290	633,382	(874,850)	(174,264)	1,752,766	303,465
Tampa MSA	(427,162)	522,003	(515,631)	1,068,147	2,881,505	705,772

SOURCE: COSTAR PROPERTY; AECOM, 2015

FIGURE 3.38 INDUSTRIAL AVERAGE ANNUAL DIRECT RENT FROM 2010 TO 2014

	2010	2011	2012	2013	2014	Avg Annual
Innovation District Core	\$4.04	\$3.80	\$3.75	\$3.83	NA	NA
Planning Study Area	\$4.56	\$4.55	\$4.64	\$7.73	\$8.12	\$5.92
Tampa	\$4.46	\$4.16	\$4.10	\$4.47	\$4.54	\$4.34
Hillsborough County	\$4.38	\$4.03	\$4.07	\$4.42	\$4.50	\$4.28
Tampa MSA	\$4.63	\$4.32	\$4.30	\$4.52	\$4.60	\$4.47

SOURCE: COSTAR PROPERTY; AECOM, 2015

NOTE: N/A INDICATES A LACK OF AVAILABLE DATA FOR THE TIME PERIOD AND GEOGRAPHY

04 Land Use and Planning Context

The Planning Study Area is a 19.2 sq/mi area bound by Bearss Avenue/Fletcher Avenue/Hillsborough River on the north, Busch Boulevard/Bullard Parkway on the south, Interstate 75 on the east and Interstate 275 on the west. This area was selected because it includes the key institutional stakeholders in the area and it encompasses the primary transportation corridors to Interstates 75 and 275.

The Innovation District Core is a 5.6 sq/mi area located within the Planning Study Area that encompasses the University of South Florida (USF), Busch Gardens, Florida Hospital, James A Haley Veterans' Hospital, Moffitt Cancer Center & Research Institute, and the University Mall and some of the neighborhood and industrial areas nearby.

Previous Studies

The Planning Study Area of the Innovation District is such a regionally important employment center and driver of the economy. Because of this, the area has been studied many times by multiple agencies over the years. Due to the fragmented nature of the jurisdictional boundaries, the existing studies only cover pieces of the Planning Study Area. However, the studies all agree that the previous business-as-usual approach towards growth and development in the area has contributed to the sense that the assets in the area are not being leveraged as well as they could be.

This summary of the previous planning efforts will be divided between two types of plans:

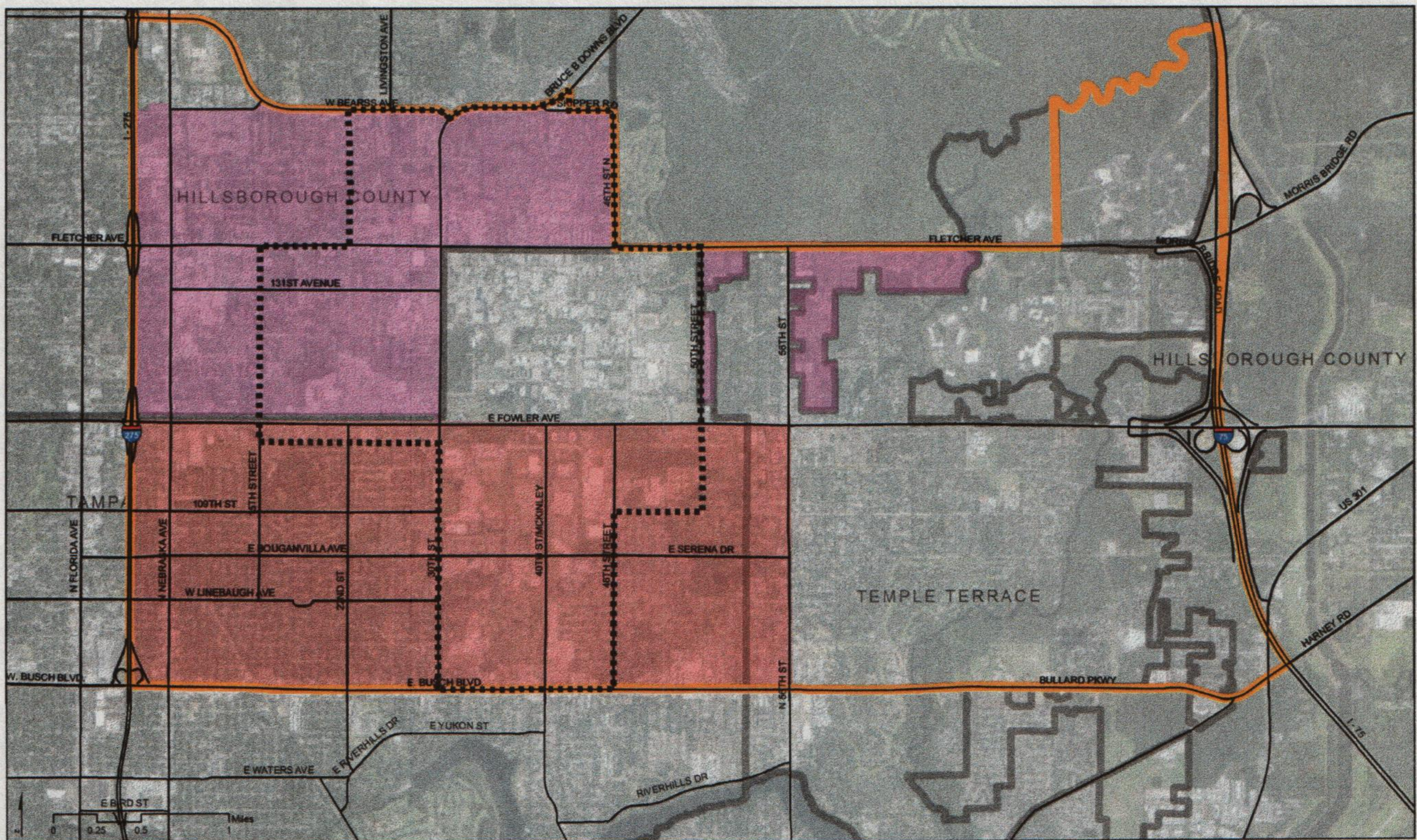
1. Community and Vision Plans
2. Transportation Infrastructure Plans

Community Plans were created as refinements to the jurisdictions' overall comprehensive plans specific to a given area for the benefit of the residents and businesses within the area. Transportation Infrastructure Plans were developed with a scope limited to transportation-related issues while aiming to benefit the residents and businesses within their study area. Although they are separated into these two types of plans, it is important to note that land use planning (Community and Vision Plans) and transportation planning are influenced by one another.

Community and Vision Plans

University Area Community Plan

The University Area Community Plan was originally adopted in 2001 and revised in 2013 with the involvement of area residents, businesses, civic organizations, law enforcement, and government agencies. The plan area is composed of the parts of unincorporated Hillsborough County north of Fowler Avenue, south of Skipper Road/Bearss Avenue/Bruce B Downs Boulevard, east of Interstate



**FIGURE 4.1
COMMUNITY PLANS**

SOURCE: AECOM, 2015

COMMUNITY PLANS LEGEND

- Major Roads
- Innovation District Core
- Planning Study Area
- Jurisdiction
- University Area Community Plan
- Terrace Park-University Square Vision Plan

UNIVERSITY AREA COMMUNITY PLAN

VISION

"The University Area Community Plan will strive to create a stable, safe, and livable community through physical revitalization which establishes positive neighborhood identity and provides community design guidelines to achieve a pedestrian friendly, mixed use area that will serve the needs of the citizens of the University Area Community."

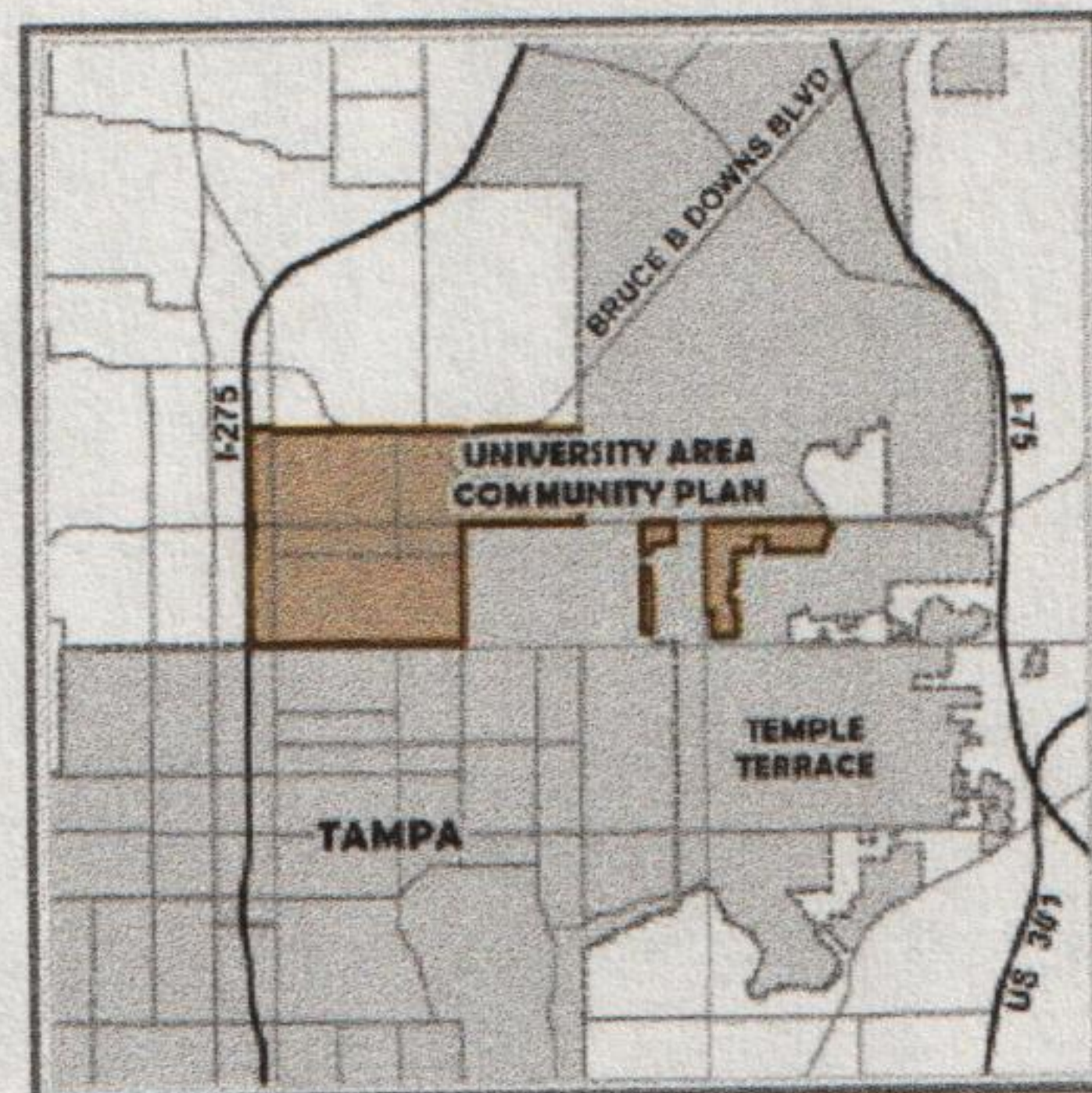


FIGURE 4.2
UNIVERSITY AREA COMMUNITY PLAN
SOURCE: PLAN HILLSBOROUGH, 2013

275, and west of USF/N 46th Street. It also covers the three unincorporated Hillsborough County areas in between the cities of Tampa and Temple Terrace east of USF and west of the Hillsborough River. The community plan is a part of the Livable Communities Element of the Comprehensive Plan for Unincorporated Hillsborough County Florida.

The plan includes a series of goals and strategies intended to build community infrastructure, eliminate obsolete land uses, create community identity, ensure community input, and promote economic development. This will be accomplished by: improving stormwater management within

the area; creating a hierarchy of boulevards, streets, and pedestrian links to foster multi-modal mobility; implementing traffic calming; reducing crime through design improvements; advocating home ownership; changing zoning to create mixed-use districts; supporting redevelopment of deteriorating properties on major corridors with higher densities and mixed uses; enhancing community policing programs; improving street lighting; implementing surveillance cameras and call boxes; using landscaping buffers to allow land uses to coexist; creating a community-based organization to implement the community plan; implementing existing redevelopment plans; and evaluating potential area-wide brownfield designation for the area.

Terrace Park-University Square Vision Plan

The Terrace Park-University Square Vision Plan was completed in 2013 and developed a long-term vision with the input of stakeholders through workshops, surveys, and interviews. The plan covers the land within the City of Tampa north of Busch Boulevard, south of USF, east of Interstate 275 and west of the Temple Terrace city limit. The stakeholders developed a series of strategies to improve quality of life, public safety, housing, transportation, public facilities and services, parks recreation and open space, land use, and economic development.

TERRACE PARK- UNIVERSITY SQUARE VISION PLAN

STAKEHOLDERS VISION STATEMENT

"The Terrace Park and University Square neighborhoods aspire to have a vibrant, clean, and safe community that is a welcome place to live, work, and play, with quality housing, exceptional recreational areas, easy-access to government services, efficient multi-modal transportation options connecting to the wider City, and increased economic development opportunities."

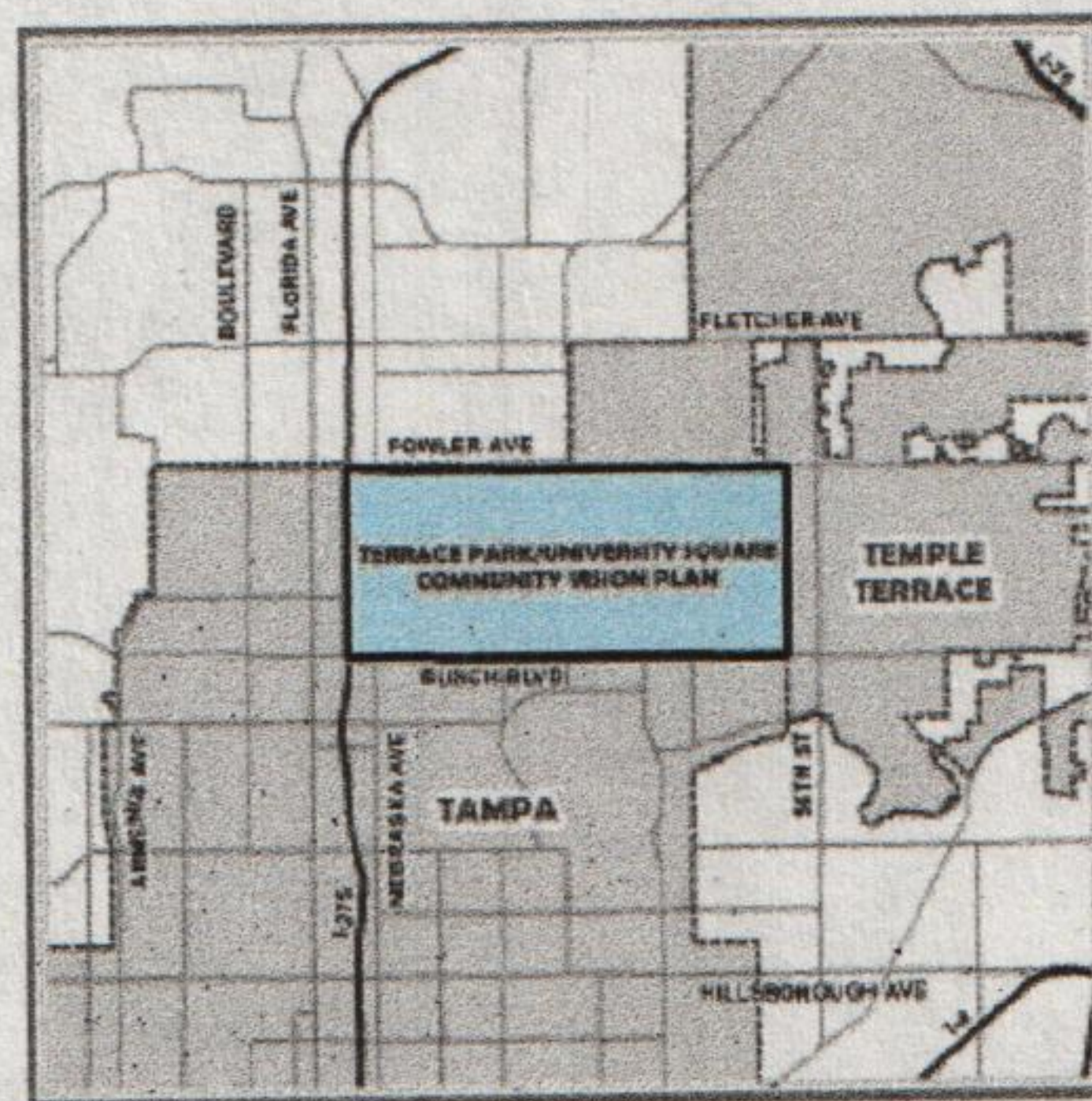


FIGURE 4.3
TERRACE PARK-UNIVERSITY SQUARE VISION PLAN

SOURCE: THE PLANNING COMMISSION, 2013

The Terrace Park-University Square Vision Plan was developed to address challenges with crime, aesthetics, litter, poor street lighting, the lack of home ownership, code enforcement issues, pedestrian and bike safety, missing sidewalks and crosswalks, park maintenance and policing, a lack of parks, and unemployment among residents.

Strategies identified by the plan to address the issues include: developing a form-based code for the area; "Adopt-a-Street" programs; restricting the development of duplexes in the area; assisting with home rehabilitation and maintenance;

installing bike racks; developing community-based safety programs and crime prevention; creating community events; creating community gardens; improving community parks by adding amenities and improving maintenance; using public and private funding sources to support community revitalization; encouraging investment on Busch Boulevard and Nebraska Avenue; and encouraging redeveloping commercial parcels to improve facades, signage, landscaping, and access management.

Comparison of Community and Vision Plans

The two Community and Vision Plans identified a similar set of challenges and defined a similar set of recommendations. Both plans support fighting crime through a combination of crime prevention through environmental design (CPTED) in redeveloping properties, community policing, better street lighting, and support for neighborhood watch associations. They also support multimodal transportation through complete streets-type projects, pedestrian and bike safety improvements, placemaking through landscaping and buffers, and traffic calming efforts. Both plans also recommend the support of home ownership and reinvestment in the community as a way to reduce the transient nature of the population and to better foster community-building.

The two plans were not without their differences, however. The Terrace Park-University Square Vision Plan supports neighborhood stabilization with the promotion of single-family houses while restricting higher densities and mixed-uses. On the north side of Fowler Avenue, the University Area Community Plan supports neighborhood reinvestment through higher densities of development and encouraging mixed uses (which supports the existing concentrations of multi-family housing north of Fowler Avenue). The plans emphasize the importance of the overall quality of the development, and the consensus to support stronger code enforcement.

Transportation Infrastructure Plans

University of South Florida Area Multimodal Transportation District, Study Area Evaluation and Transportation Needs for the University Area

The study proposed establishing a Multimodal Transportation District (MMTD), for a region defined as north of Fowler Avenue, south of Sinclair Hill Road/Bruce B Downs Boulevard/Fletcher Avenue, east of Interstate 275, and west of Livingston Avenue/N 46th Street/N 56th Street. This MMTD evaluation was developed by the Hillsborough Metropolitan Planning Organization (MPO) and the Hillsborough County Planning and Growth Management Department in 2010 with the

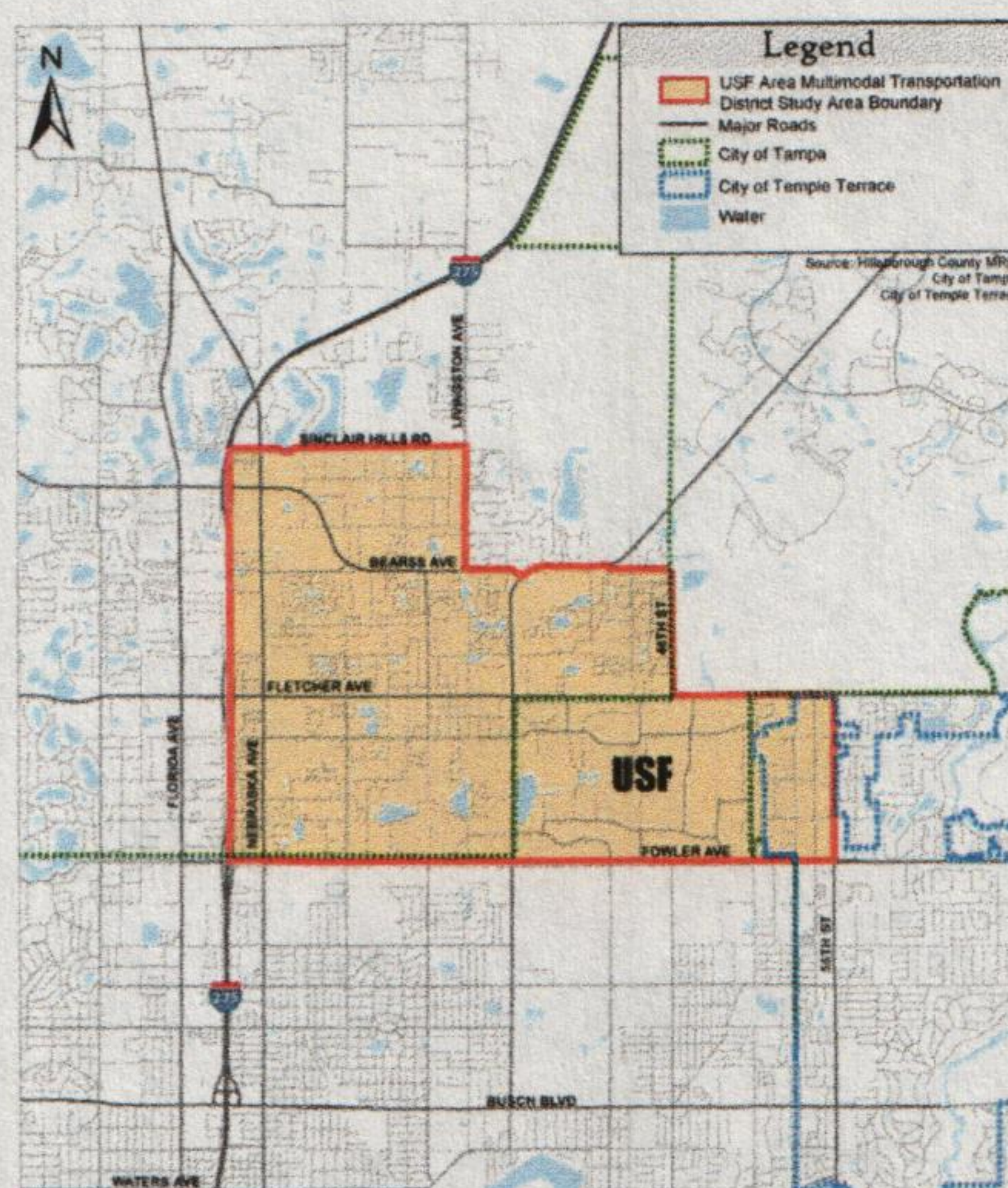


FIGURE 4.4
USF AREA MMTD STUDY AREA LOCATION MAP
SOURCE: HILLSBOROUGH COUNTY, 2010

consultation of local residents and stakeholders. An MMTD is created to facilitate the development of multimodal transportation and infill development through establishing multimodal concurrency (or mobility fees in unincorporated Hillsborough County areas) management standards and incentivizing higher densities and land use intensities. This report

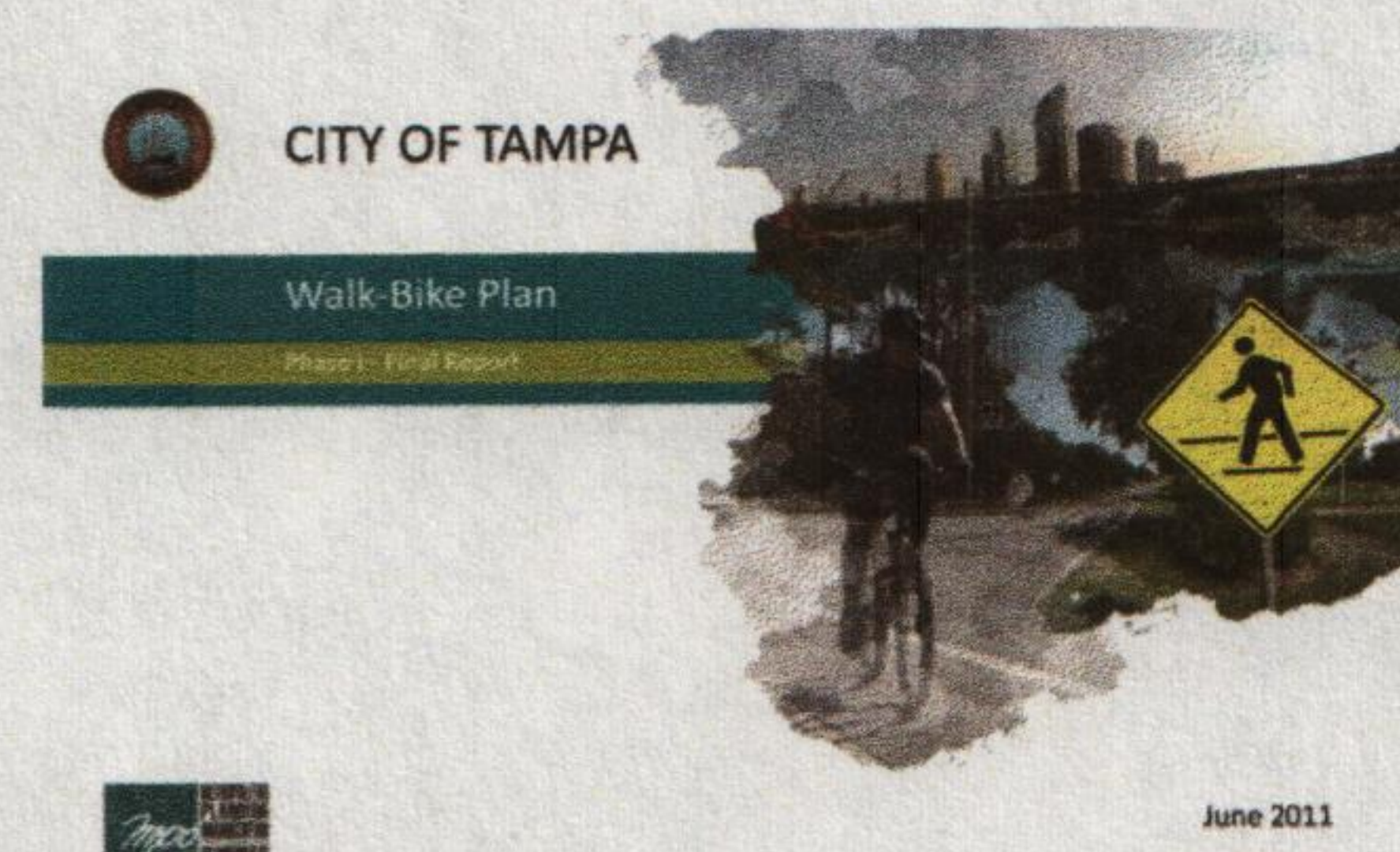


FIGURE 4.5
CITY OF TAMPA WALK-BIKE PLAN
SOURCE: METROPOLITAN PLANNING ORGANIZATION FOR TRANSPORTATION, 2011

concluded that this area qualifies as an MMTD and that it needs improvement in employment density, street network connectivity, and Quality/Level of Service (QOS) for pedestrian and transit.

City of Tampa Walk-Bike Plan

The City of Tampa Walk-Bike Plan was created by the Hillsborough MPO and the City of Tampa following the 2009 update to the Tampa Comprehensive Plan, which called for growth within the city's "Business Centers", including the USF area. The plan was used to allocate available resources, identify right-of-way (ROW) needs for multi-modal transportation projects, and to identify projects eligible for federal

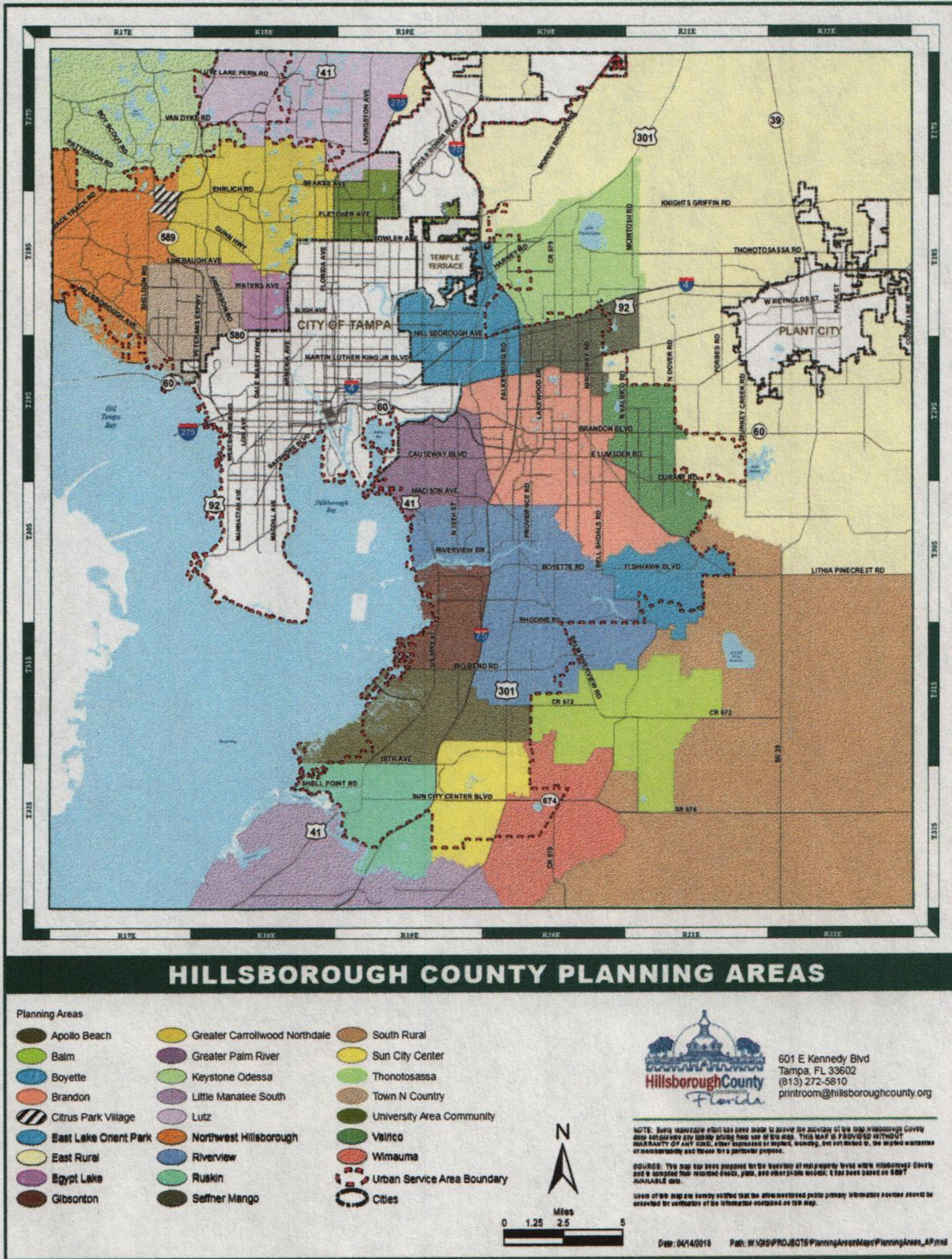


FIGURE 4.6
HILLSBOROUGH COUNTY PLANNING AREAS
SOURCE: THE PLANNING COMMISSION, 2013

grants. It identified numerous bike and pedestrian facility improvement projects within the Planning Study Area, many of which have been completed in the past five years.

Pedestrian and Bicycle High Crash Areas Strategic Plan for Unincorporated Hillsborough

The Pedestrian and Bicycle High Crash Areas Strategic Plan for Unincorporated Hillsborough was developed in 2012 following the creation of pedestrian and bicycle safety action plans county-wide. The purpose of the plan was to analyze high-crash areas and recommend treatments.

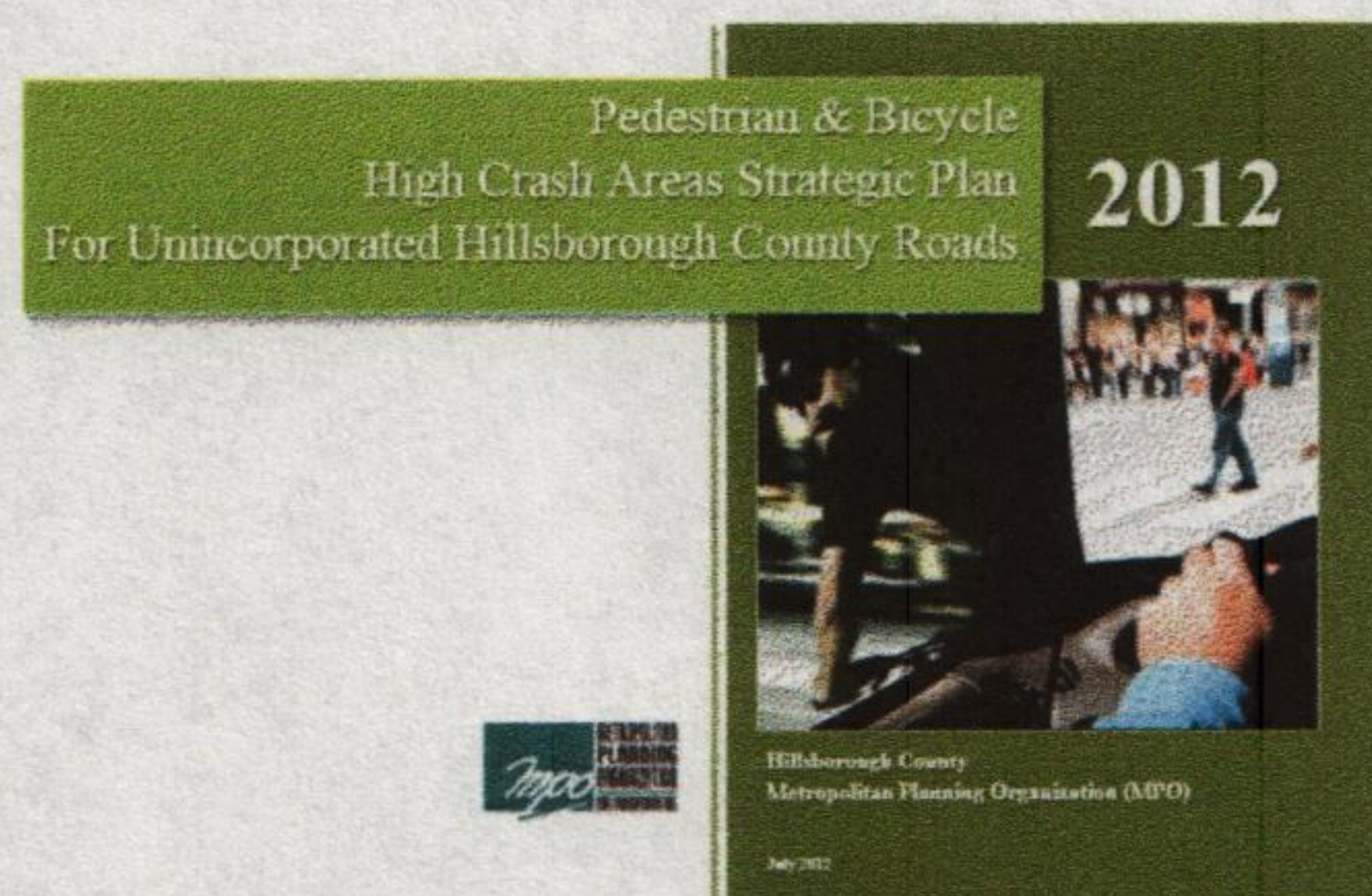


FIGURE 4.7 PEDESTRIAN AND BICYCLE HIGH CRASH AREAS STRATEGIC PLAN THE UNINCORPORATED HILLSBOROUGH
SOURCE: METROPOLITAN PLANNING ORGANIZATION FOR TRANSPORTATION, 2012

Recommendations were based on crash data and stakeholder participation, and included pedestrian-specific lighting, lane striping, enhanced pedestrian crossing, enforcement, safety education, and transit facilities. Within the USF area, recommendations were made for 56th Street, 42nd Street, 46th Street, and Bruce B Downs Boulevard.

University Area Transit Circulator Study

Based on the University Area Transit Circulator Study, five circulator options were identified. Option D (Figure 4.10) was chosen as the preferred circulator because of performance and lower cost to operate and maintain.

Express Bus in TBX Lanes

The Express Bus in Tampa Bay Express Lanes study (2015) evaluated express bus service operating within proposed tolled interstate express lanes. This bus service would provide a fast and reliable way to get between regional destinations. Figure 4.8 shows the overall proposed express bus system.

GO Hillsborough Community Transportation Plan

The Transportation for Economic Development (TED)/GO Hillsborough initiative is led by seven County Commissioners, the Mayors of Tampa, Temple Terrace and Plant City, as well as the Chairman of the Hillsborough Area Regional Transit

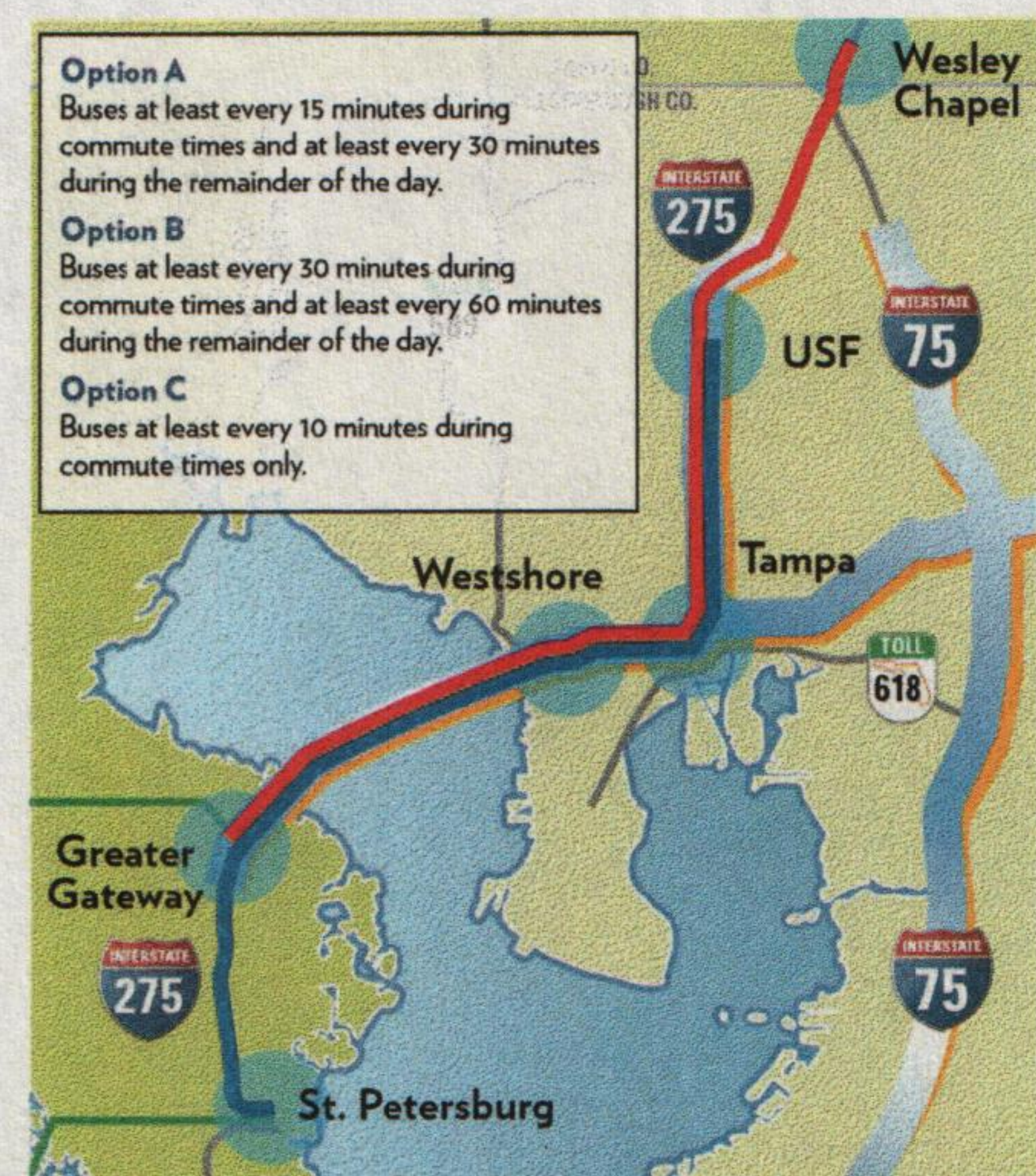


FIGURE 4.8 EXPRESS BUS SYSTEM IN TBX LANES CONCEPT
SOURCE: EXPRESS BUS IN TBX LANES, 2015



FIGURE 4.9 GO HILLSBOROUGH COMMUNITY TRANSPORTATION PLAN
SOURCE: HILLSBOROUGH COUNTY, 2015

PREFERRED OPTION	TRAVELERS SERVED	BUS SERVICE	COST (2012\$)
Option D (green route)	Students and employees to and from USF and area hospitals. Other shopping and recreational trips.	Fixed route Every 30 minutes or less	Annual cost to operate is approx. \$670,000

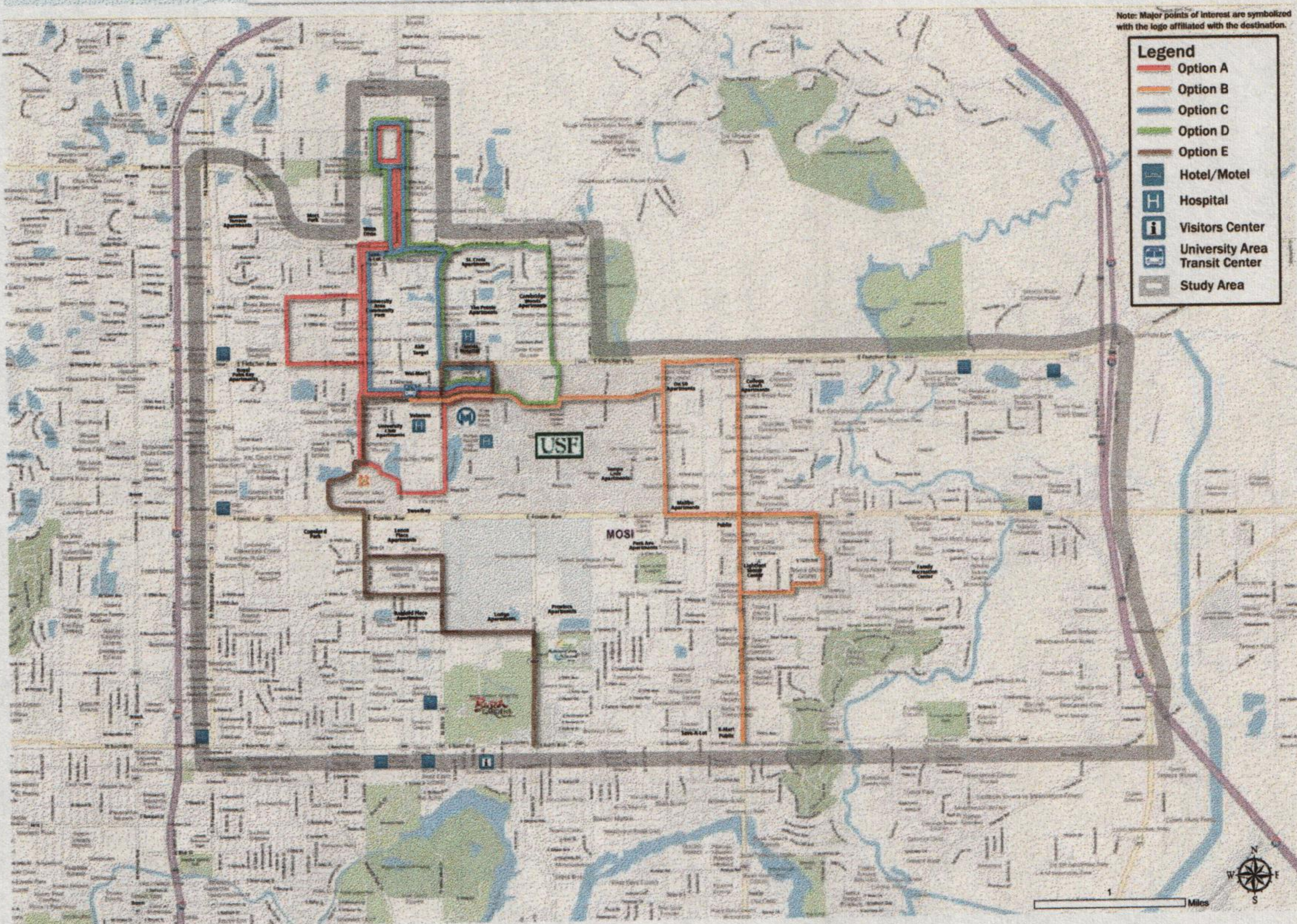


FIGURE 4.10
SUMMARY OF PREFERRED OPTION

SOURCE: UNIVERSITY AREA TRANSIT CIRCULATOR STUDY, 2013

Authority (HART) board. Important transportation issues and transportation needs to build a strong environment to enhance the ability to attract new jobs to Hillsborough County are the main focus of ongoing activities for this committee. The GO Hillsborough initiative has the potential to greatly enhance the transportation choices in the Planning Study Area and throughout the region.

A list of proposed projects were identified that directly address safety, congestion relief, enhanced transit options and maintenance to improve quality of life for the residents and improve the community's competitive edge for job creation. <http://hillsboroughcounty.org/?nid=4137>

Below is a sampling of proposed planned project for the University Area Community (see Figure 4.20): April 20, 2016:

New and Improved Signals:

- 50th street at Holly Drive

Intersection Improvements:

- 138th Avenue/Azalea Circle at Bruce B. Downs
- 22nd street at Bearss Avenue
- Bruce B Downs Boulevard and Fletcher Avenue

- Bruce B Downs Boulevard at Campus Hill Drive
- Fletcher Avenue at 15th Street
- Complete Streets:
 - 131st Avenue
 - Skipper Road/46th/42nd
 - 131st Avenue from Nebraska Avenue to 30th Street/Bruce B Downs Boulevard

Other Transportation Infrastructure Planning

Additional transportation projects that may benefit the Innovation District are in early stages of development. One of the highest-profile projects is the CSX Corridor Hybrid Rail. This project proposes a rail connection between USF and Downtown Tampa by way of the existing CSX railroad. The service would utilize diesel-powered rail cars that can share the rails with the existing freight traffic.

Transportation Infrastructure Plans Comparison

Transportation systems play a critical role in defining the character of any community. They establish the functional structure of the urban fabric: sizing blocks, providing access, and dictating the arrangement and interaction of land uses. It is important to balance the goals of moving traffic and building livable communities. A first step is

acknowledging that transportation affects land use and land use affects transportation choice. Land use and transportation need to be planned together to build better communities and create a strong sense of place for residents, business owners, employees and visitors.

The transportation infrastructure plans all agree that the facilities in the area near USF needs to better accommodate pedestrians, bikes, and transit. These needs of the community can be better served by complete streets. The Tampa and Hillsborough County pedestrian and bicycle plans both identified and prioritized corridors to receive pedestrian and bicycle improvements. Additionally, the Hillsborough County and the MMTD report identify a need for further enhancements of transit infrastructure and services. To address this need, the USF Area Complete Streets Concept Plan has been developed to describe a strategy for implementing complete streets on 46th Street and 131st Avenue. The Express Bus in Tampa Bay Express Lanes study explored how the regionally important housing and employment centers such as the Planning Study Area can be better served by regional transit while the University Area Transit Circulator Study explored how the Planning Study Area could be better served by internal transit.

Data Sources

The analysis in the Innovation District Master Plan was developed using data provided by Hillsborough County, the Tampa Innovation Alliance, City of Tampa, City of Temple Terrace, The Planning Commission, The Hillsborough MPO, and the Florida Geographic Data Library. Additional information was obtained from interviews with stakeholders, including key representatives of Hillsborough County, Tampa Innovation Alliance, Busch Gardens, City of Tampa, City of Temple Terrace, Florida Hospital, James A Haley Veterans' Hospital, Moffitt Cancer Center & Research Institute, RD Management (University Mall), FDOT, The Hillsborough Planning Commission Metropolitan Planning Organization, USF Business and Finance, and the USF Research Foundation.

Existing mapping

Jurisdiction

One of the unique characteristics of the Innovation District Planning Study Area is that it spans multiple jurisdictions. Portions of the area fall into unincorporated Hillsborough County, City of Tampa, and City of Temple Terrace. Additionally, USF is a part of the State University System of Florida and many of its development decisions are controlled by the Florida Board of Governors. The James A Haley Veterans' Hospital is operated by the US Department of Veteran Affairs (VA) and many of its development decisions are made at a federal level. Figure 4.11 shows the different jurisdictions in the Planning Study Area.

Figure 4.11 shows the agencies responsible for the different transportation facilities within the area.

Throughout the stakeholder interviews, the project team inquired to what extent the number of jurisdictions was perceived to be a barrier to the success of the area. The consensus among stakeholders was that the different jurisdictions generally have procedures in place that allow the regional problems to be solved. However, there was still some difficulty caused by the specific jurisdictional boundaries. For instance, the Tampa city limit west of USF and north of Fowler Avenue cuts through the middle of the outparcels at the University Mall, which requires certain permits to be acquired from both jurisdictions.

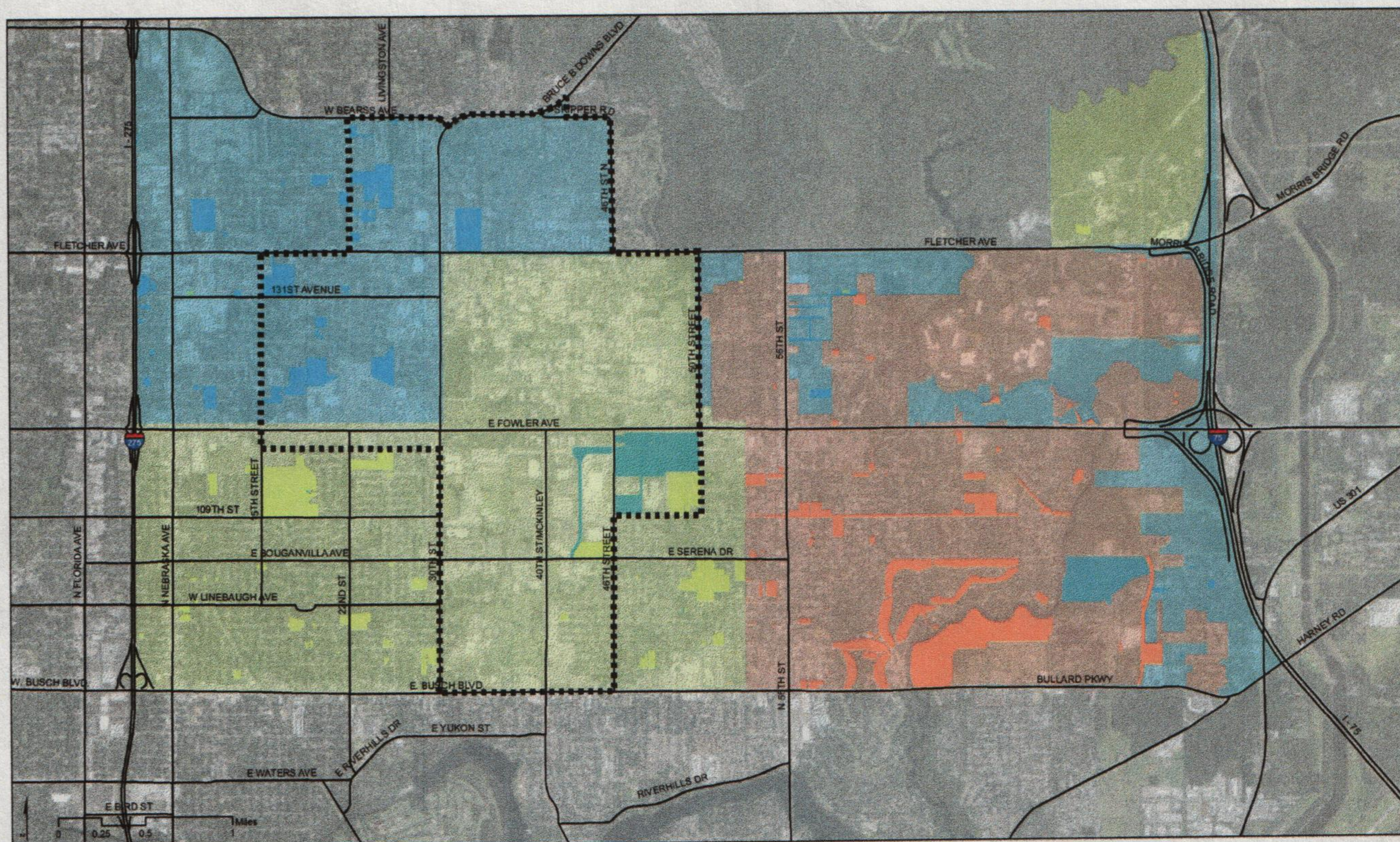


FIGURE 4.11
LAND JURISDICTION

SOURCE: AECOM, 2015. DATA SOURCE: THE PLANNING COMMISSION
HILLSBOROUGH COUNTY JURISDICTIONAL AND URBAN SERVICE AREA
BOUNDARIES SHAPE/LAYER FILES; HILLSBOROUGH COUNTY PROPERTY
APPRAISER PARCEL DATA OCTOBER 27, 2015 UPDATE

LAND JURISDICTION LEGEND

Jurisdiction	Innovation District Core
Hillsborough County	Hillsborough County Parcels
Tampa	City of Tampa Parcels
Temple Terrace	City of Temple Terrace Parcels

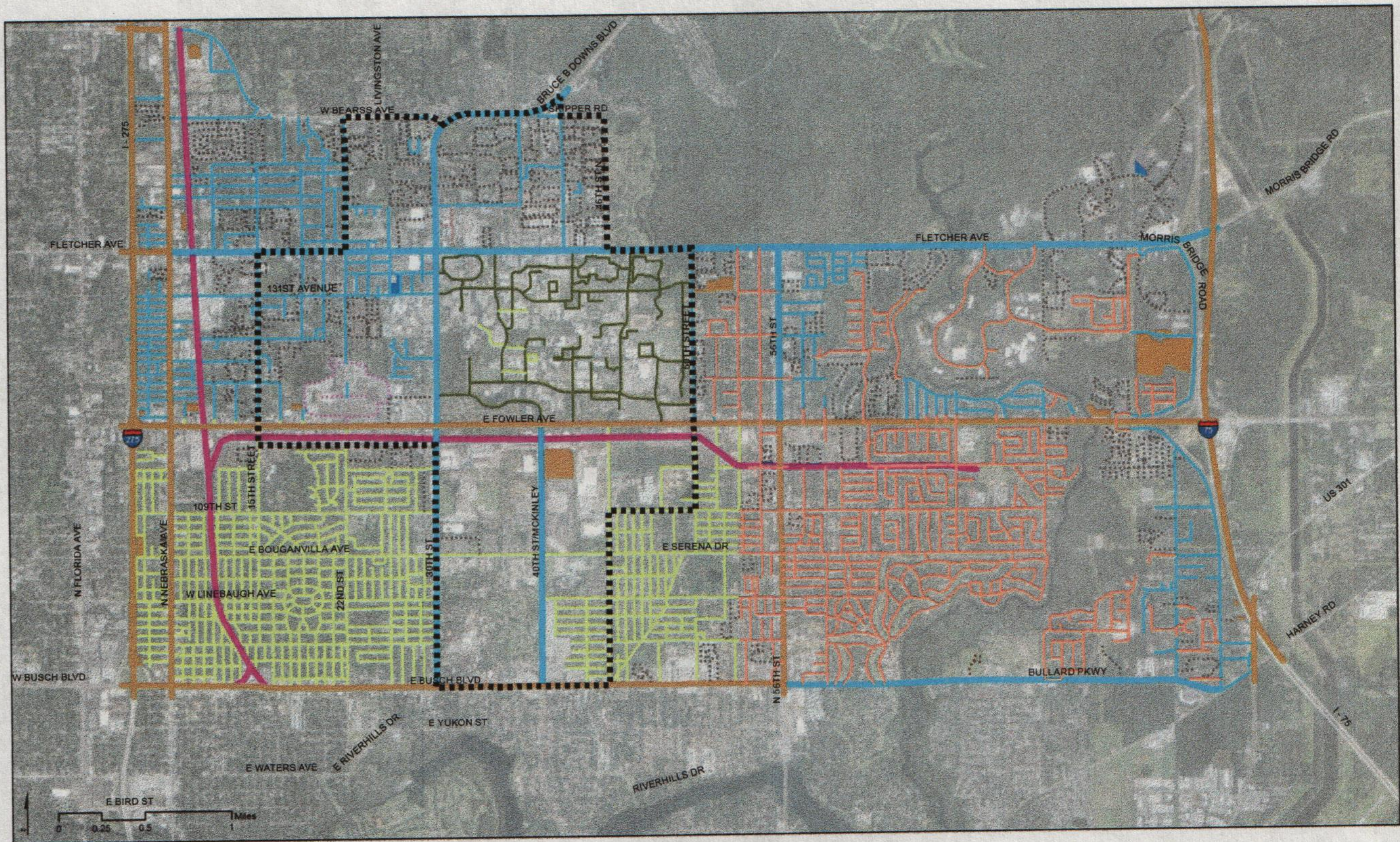


FIGURE 4.12
RIGHT-OF-WAY JURISDICTION

SOURCE: AECOM, 2015. DATA SOURCE: CITY OF TAMPA ROADS CENTER-LINE; HILLSBOROUGH COUNTY PROPERTY APPRAISER PARCEL DATA OCTOBER 27, 2015 UPDATE; TEMPLE TERRACE STREET CENTERLINE DATA, 2015

RIGHT-OF-WAY JURISDICTIONS

- | | | |
|--------------------------------------|-----------------------------|--|
| Innovation District Core | City of Temple Terrace | Florida Hospital |
| Florida Department of Transportation | Hillsborough County | University Mall |
| CSX Rail Right of Way | University of South Florida | Other Private |
| City of Tampa | Florida College | Hillsborough Area Regional Transit Authority |

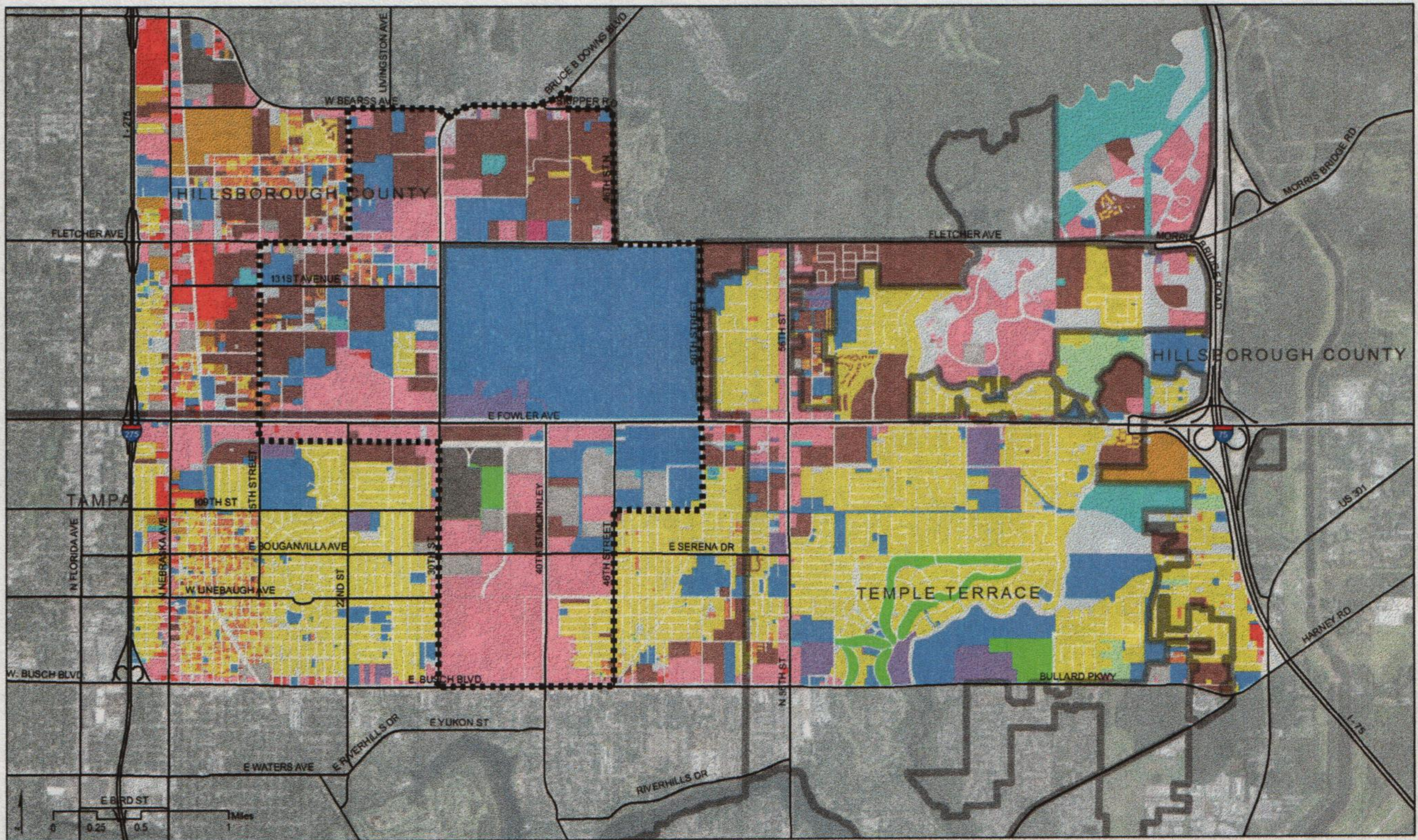


FIGURE 4.13
EXISTING LAND USE

SOURCE: AECOM, 2015. DATA SOURCE: THE PLANNING COMMISSION EXISTING LAND USE QUARTERLY UPDATE: SEPTEMBER 01, 2015

EXISTING LAND USE LEGEND

<ul style="list-style-type: none"> — Major Roads ■ Innovation District Core □ Jurisdiction 	<p>Existing Land Use</p> <ul style="list-style-type: none"> ■ Agricultural ■ Educational ■ Heavy Commercial ■ Heavy Industrial ■ Light Commercial ■ Light Industrial ■ Mobile Home Park ■ Multi-Family ■ Not Classified ■ Public / Quasi-Public / Institutions ■ Public Communications / Utilities ■ Recreational / Open Space ■ Right of Way / Roads / Highways ■ Single Family / Mobile Home ■ Two Family ■ Unknown ■ Vacant
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Existing Land Use

The existing land use in the Planning Study Area is shown in Figure 4.13. The property adjacent to the major corridors in the City of Tampa and the City of Temple Terrace generally present conventional light commercial strip development with single family residential taking up the majority of the remaining space. In the City of Tampa near Nebraska Avenue, the residential area is a mix of single and multi-family residential. Unincorporated Hillsborough County and the areas of Tampa located within the Innovation District Core have a higher intensity of development, with large areas of light commercial, institutional, industrial, and multi-family residential land uses.

Zoning in the Planning Study Area is shown on Figure 4.13. Commercial and Residential are the primary categories. The City of Tampa jurisdiction is predominately single family residential, whereas Hillsborough County is lower density multi-family. Additionally, there are several dozen Planned Developments (PDs) within the Planning Study Area. These are developments that have negotiated flexibility to encourage creative, innovative, and/or mixed use development that are planned as a single development but can be built in phases. Each of these existing PDs or DRIs has previously negotiated entitlements and impact fee agreements. Therefore, within the Planning Study Area there are a number of places where current policymakers have little

input in how they develop in the future. Many of the existing PDs are the very institutions and major developments that make the Planning Study Area the employment center that it is. Future PDs should also be negotiated to be developed with principles consistent with the Innovation District.

The Planning Study Area has several Developments of Regional Impact (DRIs) such as Busch Gardens, USF Research Park, and University Mall. A DRI is defined as "any development which, because of its character, magnitude, or location, would have a substantial effect upon the health, safety or welfare of citizens of more than one county" (Section 380.06(1), Florida Statutes). Additionally, there are several dozen Planned Developments (PDs) within the Planning Study Area. These are developments that have negotiated flexibility to encourage creative, innovative, and/or mixed use development that are planned as a single development but can be built in phases. Each of these existing PDs or DRIs has previously negotiated entitlements and impact fee agreements. Therefore, within the Planning Study Area there are a number of places where current policymakers have little input in how they develop in the future. Many of the existing PDs are the very institutions and major developments that make the Planning Study Area the employment center that it is. Future PDs should

also be negotiated to be developed with principles consistent with the Innovation District.

The City of Tampa has Comprehensive Plan policies that established a TCEA (Transportation Concurrency Exception Area) which includes Urban Infill, Urban Redevelopment, and Downtown Revitalization Districts. Figure 1 illustrates the City of Tampa TCEA. The majority of the Planning Study Area is in an Urban Infill District while USF is in an Urban Redevelopment District. Development within Urban Redevelopment Districts have fewer requirements than in Urban Infill Districts, but both can require specific impact fees to mitigate the negative effects of a new development on the transportation system based on the results of the impact analysis process.

Many parcels, especially on the north side of Fowler Ave, cross jurisdictional boundaries. The City of Tampa and Hillsborough County have agreements which are designed to reduce the complexity of permitting and regulating these parcels. However, even with these agreements in place, it is still perceived by members of the development community to be more complicated to redeveloping these parcels than other single-jurisdiction parcels.

Figure 4.14 shows the existing zoning regulations for the Planning Study Area. Generally, the zoning and the existing land use have a similar pattern of strip commercial development.

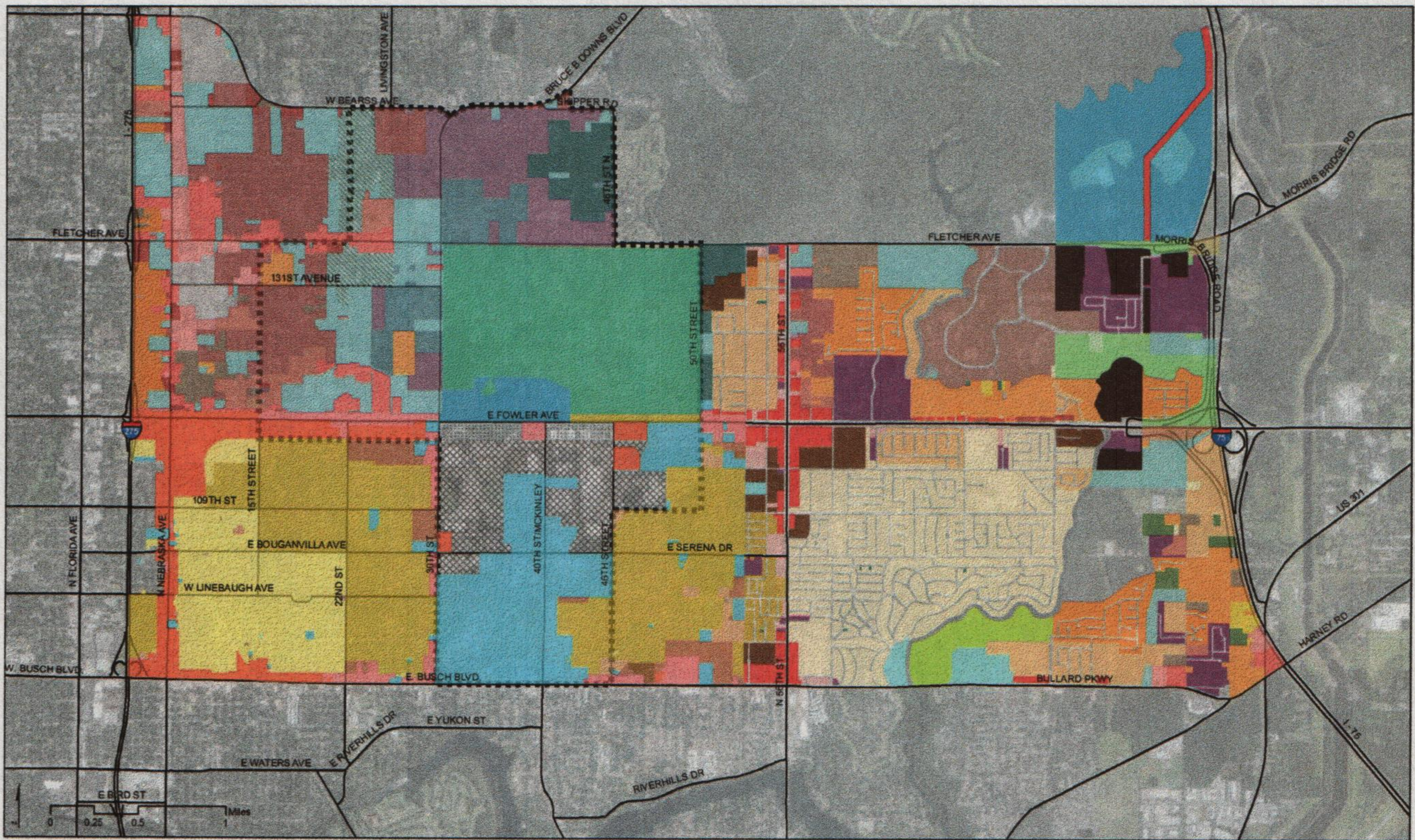

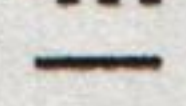


FIGURE 4.14
ZONING

SOURCE: AECOM, 2015. DATA SOURCE: HILLSBOROUGH COUNTY

ZONING LEGEND

 Innovation District Core

 Major Roads

Temple Terrace Zoning

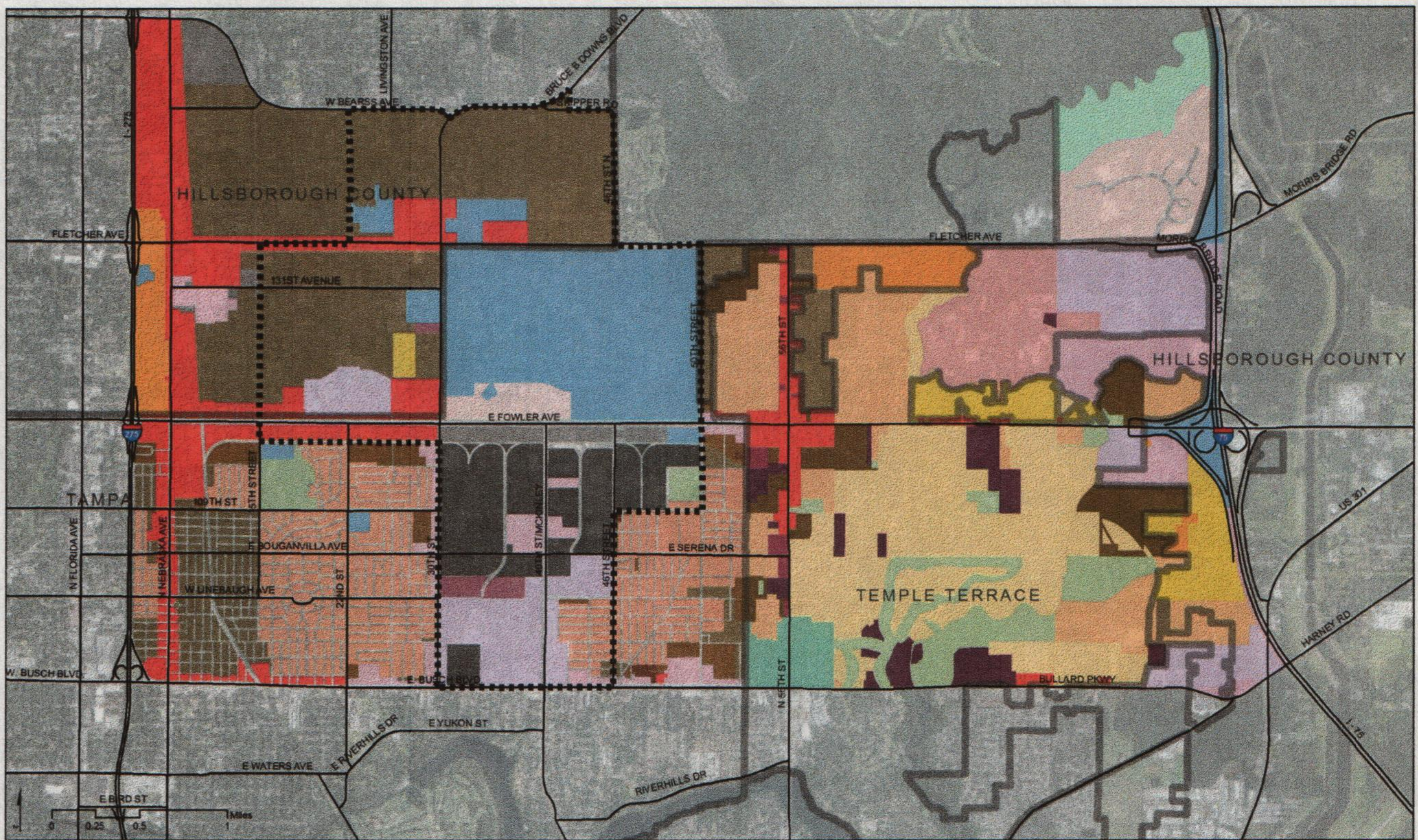
-  CG - Commercial General
-  CO - Commercial Office
-  EI - Educational/Institutional
-  PD - Planned Development
-  PDR - Planned Development Residential
-  PROF - Planned Research Office Facilities
-  PRS
-  R-10 - Single Family Residential
-  R-7 - Single Family Residential
-  R-7.5 - Single Family Residential
-  R-9 - Single Family Residential
-  R-MF - Multi-Family Residential
-  R-MFA - Alternate Multi-Family Residential

Tampa Zoning

-  CG - Commercial General
-  CI - Commercial Intensive
-  CN - Community Neighborhood
-  CU - Community Unit
-  IG - Industrial General
-  IH - Industrial Heavy
-  OP - Office Professional
-  PD - Planned Development
-  PD-A - Planned Development Alternative
-  RM-12 - Residential Multi-Family
-  RM-16 - Residential Multi-Family
-  RM-18 - Residential Multi-Family
-  RM-24 - Residential Multi-Family
-  RM-35 - Residential Multi-Family
-  RO - Residential Office
-  RO-1 - Residential Office
-  RS-50 - Residential Single-Family
-  RS-60 - Residential Single-Family
-  UC - University Community District

Hillsborough County Zoning

-  AI - Agricultural, Industrial
-  AR - Agricultural, Rural
-  AS-1 - Agricultural, Single-Family - 1 RU/Ac
-  ASC-1 - Agricultural, Single-Family Convent'l - 1 RU/Ac
-  BPO - Business, Professional Office
-  CG - Commercial, General
-  CI - Commercial, Intensive
-  CN - Commercial, Neighborhood
-  IPD-2 - Interstate Planned Development
-  M - Manufacturing
-  OR - Office Residential
-  PD - Planned Development
-  RDC-12 - Duplex Convent'l - 12 U/Ac
-  RMC-12 - Multi-Family Convent'l - 12 U/Ac
-  RMC-16 - Multi-Family Convent'l - 16 U/Ac
-  RMC-20 - Multi-Family Convent'l - 20 U/Ac
-  RSC-2 - Single-Family Convent'l - 2 U/Ac
-  RSC-3 - Single-Family Convent'l - 3 U/Ac
-  RSC-4 - Single-Family Convent'l - 4 U/Ac
-  RSC-6 - Single-Family Convent'l - 6 U/Ac
-  RSC-9 - Single-Family Convent'l - 9 U/Ac
-  SPI-UC-1 - University Community
-  SPI-UC-2 - University Community
-  SPI-UC-3 - University Community
-  UCA-MS - University Community Area
-  UCA-NHO - University Community Area



**FIGURE 4.15
FUTURE LAND USE**

SOURCE: AECOM, 2015. DATA SOURCE: THE PLANNING COMMISSION
2025 FUTURE LAND USE QUARTERLY UPDATE FOR UNINCORPORATED
HILLSBOROUGH COUNTY, TAMPA, AND TEMPLE TERRACE: SEPTEMBER
01, 2015

FUTURE LAND USE LEGEND

— Major Roads	■ Natural Preservation
■ Innovation District Core	■ Office Commercial-20 (.75 FAR)
■ Jurisdiction	■ Public/Quasi-Public
Tampa Future Land Use	■ Residential-12 (.35 FAR)
■ Community Commercial-35 (2.0 FAR)	■ Residential-20 (.35 FAR)
■ Community Mixed Use-35 (2.0 FAR)	■ Residential-6 (.25 FAR)
■ Major Environmentally Sensitive Areas	■ Residential-9 (.35 FAR)
■ Heavy Industrial (1.5 FAR)	■ Regional Mixed Use-35 (2.0 FAR)
■ Light Industrial (1.5 FAR)	■ Urban Mixed Use-20 (1.0 FAR)
■ Public/Semi-Public	Temple Terrace Future Land Use
■ Residential-10 (.35 FAR)	■ Commercial
■ Residential-20 (.50 FAR)	■ Community Mixed Use-12 (12 DU/acre)
■ Residential-35 (.60 FAR)	■ Downtown Mixed Use-25 (25 DU/acre)
■ Residential-50 (1.0 FAR)	■ Office/Institutional
■ Recreational/Open Space	■ Public/Semi-Public
■ Regional Mixed Use-100 (3.5 FAR)	■ Park/Recreation Open Space
■ Suburban Mixed Use-6 (.50 FAR)	■ Residential-18 (18 DU/acre)
■ Urban Mixed Use-60 (3.25 FAR)	■ Residential-4 (4 DU/acre)
Hillsborough County Future Land Use	■ Residential-9 (9 DU/acre)
■ Community Mixed Use-12 (.50 FAR)	■ Research/Corporate Park
■ Light Industrial (.50 FAR)	■ Urban Mixed Use-20 (20 DU/acre)

Future Land Use

The future land use in the Planning Study Area is shown in Figure 4.15. Like the existing land use, the future land use maintains the general pattern of single family residential districts separated by commercial corridors in the cities of Tampa and Temple Terrace. The densities are somewhat higher with higher floor area ratios (FARs) and more multi-family housing and the amount of mixed use land along the corridors is higher. The future land use in unincorporated Hillsborough County has a similar pattern.

**FIGURE 4.17
PROPERTY OWNERS WITH GREATER THAN 50
ACRES, 2015**

SOURCE: HILLSBOROUGH COUNTY PROPERTY APPRAISER; AECOM, 2015

	PARCELS	TOTAL AREA (ACRES)
USF	14	929.06
Busch Gardens	15	353.57
Hillsborough County	103	334.31
City of Temple Terrace	92	308.22
Tampa Electric Company	38	206.82
City of Tampa	76	183.05
Hillsborough River LLC	2	161.45
School Board of Hillsborough County	8	115.65
FDOT	33	103.10
Florida College	5	99.53
University Mall	12	93.01
Carlton Arms North	1	76.63
Mary Louise Ripple LTD	1	64.43
Verizon Data Services Inc	1	63.14
Village of Tampa LLC	1	62.62
Florida Hospital	10	58.15
BOH Hidden River FL LP	5	58.07
Lamplighter MHC LLC	1	57.69
US Department of Veteran Affairs	8	54.33

Property Owners

Figure 4.16: Large Landowners shows the parcel locations of the largest land owners in the Planning Study Area. Figure 4.17 lists the major land owners within the Planning Study Area. The largest property owners are: USF, Busch Gardens, local governments and institutional uses. Other large landowners are apartment complexes and mobile/manufactured home parks like Carlton Arms North and Lamplighter Mobile Home Community.

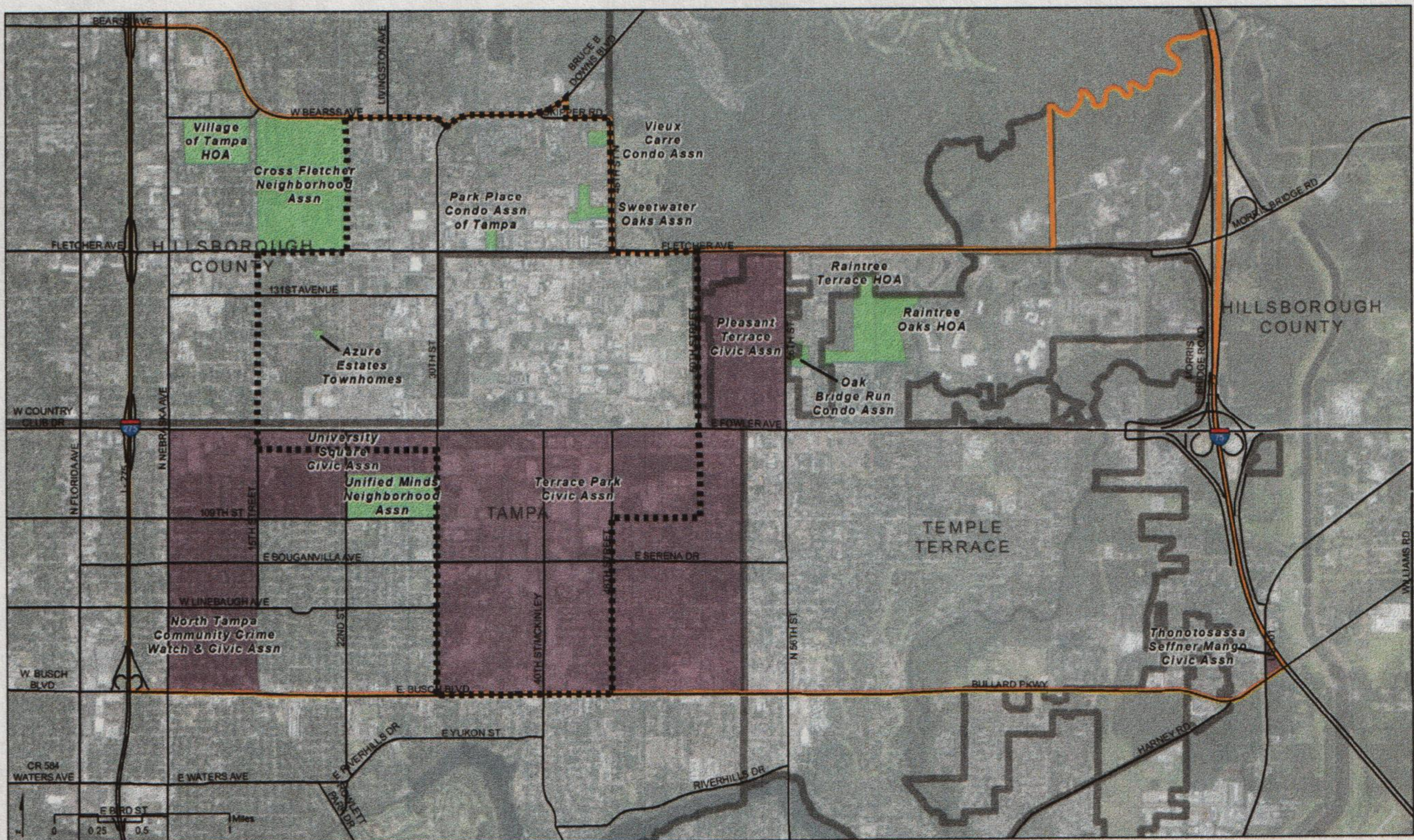


FIGURE 4.18
HOMEOWNERS/CIVIC ASSOCIATIONS

SOURCE: AECOM, 2015. DATA SOURCE: HILLSBOROUGH COUNTY FTP; 2011.

HOMEOWNERS/CIVIC ASSOCIATIONS LEGEND

- Innovation District Core
- Planning Study Area
- Civic Association
- Homeowner Association
- Jurisdiction

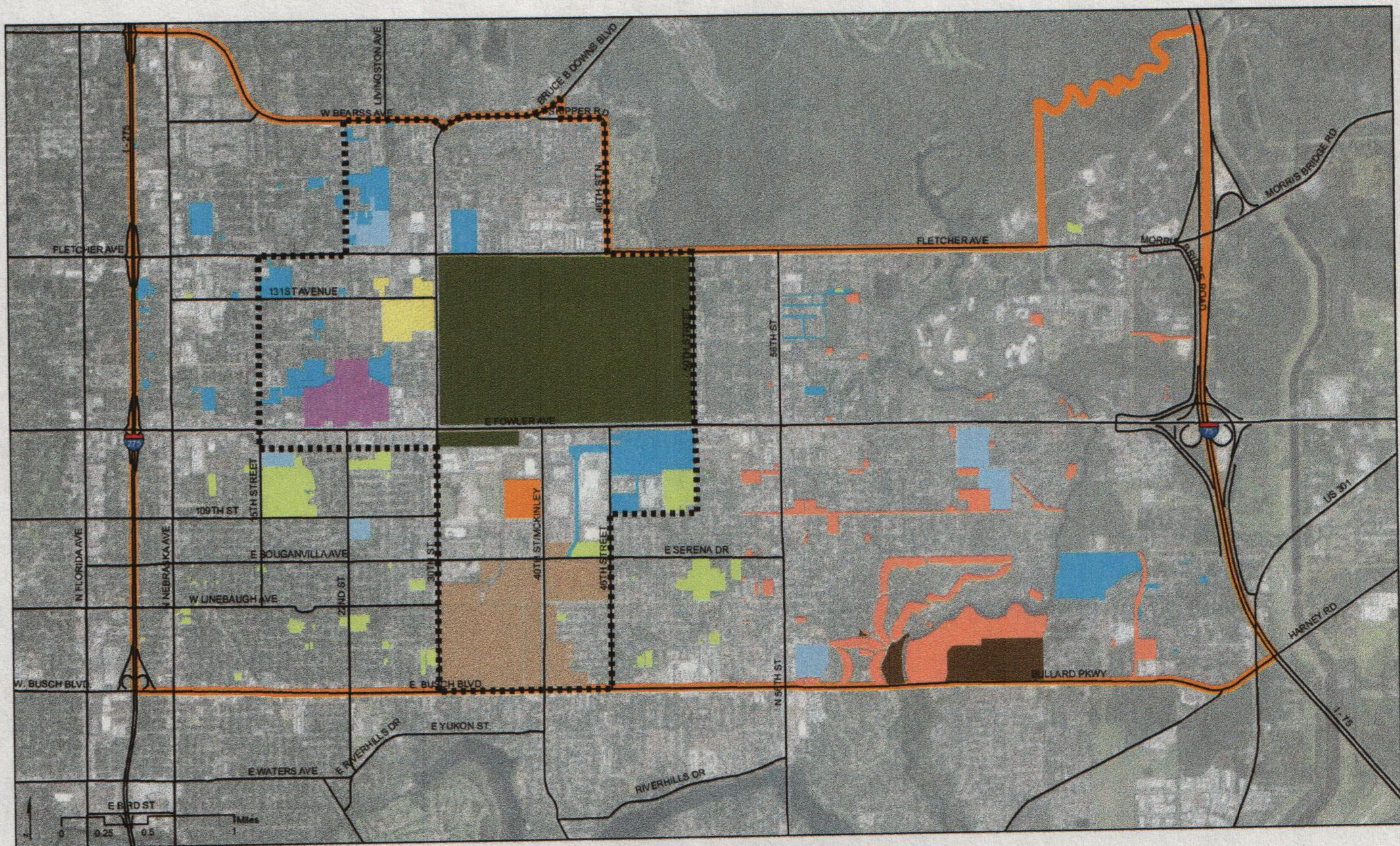


FIGURE 4.16
LARGE LANDOWNERS

SOURCE: AECOM, 2015. DATA SOURCE: THE PLANNING COMMISSION
HILLSBOROUGH COUNTY JURISDICTIONAL AND URBAN SERVICE AREA
BOUNDARIES SHAPE/LAYER FILES; HILLSBOROUGH COUNTY PROPERTY
APPRAISER PARCEL DATA OCTOBER 27, 2015 UPDATE

LARGE LANDOWNERS LEGEND

- | | | |
|--------------------------------|--------------------------------|-------------------------------------|
| Innovation District Core | Florida College | School Board of Hillsborough County |
| Hillsborough County Parcels | M2 Gen/Moffitt Cancer Research | Busch Gardens |
| City of Tampa Parcels | University of South Florida | US Department of Veterans Affairs |
| City of Temple Terrace Parcels | University Mall | Planning Study Area |

Homeowners Associations

Homeowners Associations (HOAs) and Civic Associations play an important role in maintaining neighborhoods. The location of these organizations is shown in Figure 4.18. Civic Associations like the North Tampa Community Crime Watch & Civic Association were recommended by the University Area Community Plan and the Terrace Park-University Square Vision Plan as a means of reducing crime and the other negative impacts of a less stable population.

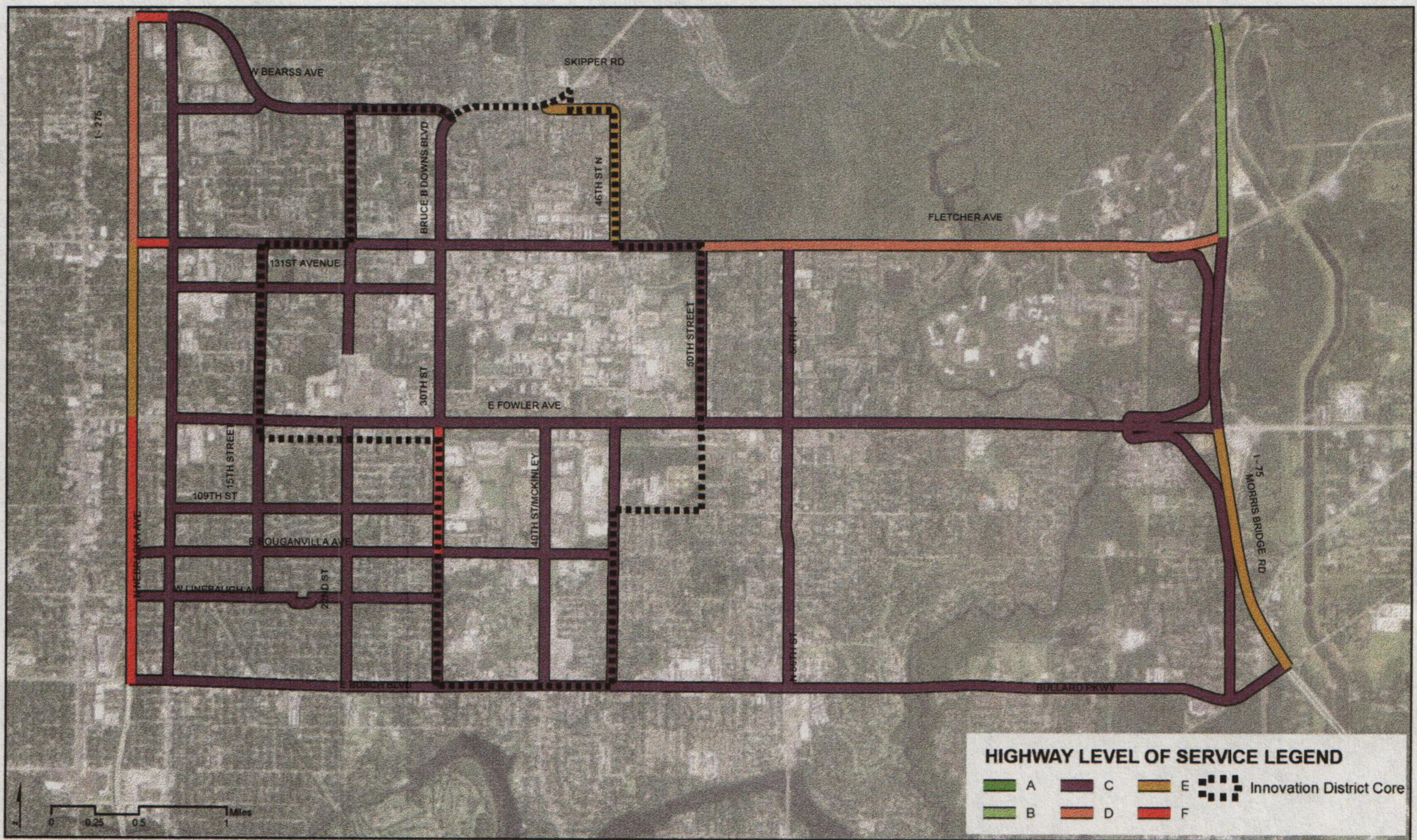


FIGURE 4.19
HIGHWAY LEVEL-OF-SERVICE

SOURCE: AECOM, 2015. DATA SOURCE: FDOT DISTRICT SEVEN 2015 LOS SPREADSHEETS AND MAPS; FDOT FLORIDA TRAFFIC INFORMATION AND HIGHWAY DATA (2014); HILLSBOROUGH COUNTY 2014 LEVEL OF SERVICE REPORT; CITY OF TAMPA TRAFFIC COUNTS

Transportation Modes

Scheduled transit service in the area is provided by 10 HART bus routes and the Bull Runner university shuttle service. Figure 5.6 includes a complete list of transit services and the carpool, carshare, bike share, and inter-city travel services in the area.

Despite the variety of alternative transportation services, the individual transportation modes are somewhat disjointed. For instance, it is not uncommon to find transit stops without connecting sidewalks or crosswalks, so riders are often forced to walk on the shoulder of the road or cross in potentially dangerous locations. It is also common for non-motorized facilities such as bike lanes or sidewalks to be completely missing on some roads. Additionally, long blocks and large roadways create barriers for walking and bicycling. The Pedestrian Safety Action Plan identified USF area as one of the most dangerous places in the country for pedestrians. A map of crashes in the Innovation District area can be found in Appendix A.5.

The Level of Service (LOS) for major roadways within the Planning Study Area was determined using a generalized planning approach as recommended by FDOT for initial problem identification in the 2013 Q/LOS Handbook. LOS is a quantitative indicator of user-based perception of how well a transportation service or facility operates. It is measured using ratings from A (best) to F (worst), and is widely used in transportation planning to evaluate problems and potential solutions. The ability of the roadway network to adequately serve the existing traffic volumes (as measured by the LOS) is shown in Figure 4.19.

This has increased the need for other forms of transportation to serve mobility needs. When considering all available modes of transportation within the Planning Study Area, the existing network provides adequate coverage for private automobile trips. However, the substandard connectivity of infrastructure and services between the Innovation District Core and surrounding areas contributes to the main transportation issues. The area is characterized by extremely long blocks and wide roadways that create barriers to walking, cycling, and access to transit. These conditions not only create challenges for vehicular access to the area, but it also reduces the ability of people to reliably use alternative modes of transportation to accommodate their mobility needs.

The following chart, Figure 4.20, shows short term (less than 5 years) and longer term (more than 5 years) Transportation Programmed Planned Infrastructure Investments. If a project is in the Transportation Improvement Plan (TIP), then it is funded in the next 5 years. If a project is in the 2040 LRTP, then it is most likely more than 5 years out. The TIP is updated every year and projects are constantly changing to funded and unfunded status depending on available funds.

**FIGURE 4.20
TRANSPORTATION PROGRAMMED/PLANNED INFRASTRUCTURE INVESTMENTS**

BICYCLE AND PEDESTRIAN IMPROVEMENTS				
Roadway	Segment	Improvement	Program	Source
131st Avenue	US 41/SR 45 (Nebraska Avenue) to CR 581/ Bruce B. Downs Boulevard (30th Street)	Bicycle and pedestrian enhancements	MPO Crash Mitigation Program	Imagine 2040: Hillsborough LRTP
SR 582 (Fowler Avenue)	Riverhills Boulevard to I-75	Bicycle and pedestrian enhancements	MPO Crash Mitigation Program	Imagine 2040: Hillsborough LRTP
SR 582 (Fowler Avenue)	US 41/SR 45 (Nebraska Avenue) to CR 581/ Bruce B. Downs Boulevard (30th Street)	Bicycle boulevard on frontage roads, median widening and landscaping	MPO Crash Mitigation Program	Imagine 2040: Hillsborough LRTP
SR 582A (Fletcher Avenue)	I-275 to 56th Street	Pedestrian enhancements	Transportation Improvement Program - Sponsored by Hillsborough County	MPO (Fiscal Years 2015/16-2019/20)
US 41/SR 45 (Nebraska Avenue)	SR 582 (Fowler Avenue) to Florida Avenue/ Nebraska Avenue	Bicycle lane restriping	Transportation Improvement Program - Sponsored by FDOT	MPO (Fiscal Years 2015/16-2019/20)
Bougainvillea Avenue	CR 581 (30th Street) to 46th Street	Pedestrian/bicycle safety enhancements	Transportation Improvement Program - Sponsored by City of Tampa	MPO (Fiscal Years 2015/16-2019/20)
46th Street	Busch Boulevard to SR 582 (Fowler Avenue)	Pedestrian/bicycle safety enhancements	Transportation Improvement Program - Sponsored by City of Tampa	MPO (Fiscal Years 2015/16-2019/20)
Tampa Bypass Canal Trail	50th Street to Fletcher Avenue/Morris Bridge Road	Multi-use trail	Transportation Improvement Program - Sponsored by Hillsborough County	MPO (Fiscal Years 2015/16-2019/20)
42nd Street	Fletcher Avenue to Skipper Road	Pedestrian/bicycle safety enhancements	Pedestrian and Bicycle Programs and Projects	Hillsborough County
TRANSIT IMPROVEMENTS				
Roadway	Segment	Improvement	Program	Source
CSX Rail Corridor	Tampa Downtown, USF	Fixed Guideway Transit (DMV on Existing Track)	2040 Cost Feasible for New Capacity Projects	Imagine 2040: Hillsborough LRTP
I-275	Pinellas County, Westshore/Tampa International Airport, Downtown Tampa, USF, Wesley Chapel	Express Bus in Express Toll Lanes	MPO Real Choices when Not Driving	Imagine 2040: Hillsborough LRTP
USF Area	New Tampa/University Area	New expanded transit service (transfer center/bus rapid transit)	Transportation Improvement Program - Sponsored by HART	MPO (Fiscal Years 2015/16-2019/20)
Fletcher Avenue, I-275	Between Pasco and Hillsborough Counties	Vanpool	TBARTA Surface Transportation Program/Vanpool	Hillsborough FY 2015/16 - 2019/20 TIP

**FIGURE 4.20 CONT'D
TRANSPORTATION PROGRAMMED/PLANNED INFRASTRUCTURE INVESTMENTS**

TRANSIT IMPROVEMENTS				
Roadway	Segment	Improvement	Program	Source
-	Nebraska Avenue and Fletcher Avenue	Bus Rapid Transit	Capital Improvement Program (HART project)	Hillsborough County Adopted CIP FY13-FY 17
-	Vicinity of I-75 and Fletcher Avenue	Park and Ride (minimum of 100-150 parking spaces)	Capital Improvement Program (HART project)	Hillsborough County Adopted CIP FY13-FY 17
ROADWAY IMPROVEMENTS				
Roadway	Segment	Improvement	Program	Source
131st Avenue	US 41/SR 45 (Nebraska Avenue) to CR 581/ Bruce B. Downs Boulevard (30th Street)	Widen (2 lanes to 4 lanes divided)	2040 Needs Assessment for Capacity Projects	Imagine 2040: Hillsborough LRTP
46th Street	CR582A (Fletcher Avenue) to Skipper Road	Widen (2 lanes to 4 lanes divided)	2040 Needs Assessment for Capacity Projects	Imagine 2040: Hillsborough LRTP
Skipper Road	CR 581/Bruce B. Downs Boulevard (30th Street) to 46th Street	Widen (2 lanes to 4 lanes divided)	2040 Needs Assessment for Capacity Projects	Imagine 2040: Hillsborough LRTP
Bearss Avenue	I-275 to CR 581/Bruce B. Downs Boulevard (30th Street)	Widen (4 lanes to 6 lanes divided)	2040 Needs Assessment for Capacity Projects	Imagine 2040: Hillsborough LRTP
CR 582A (Fletcher Avenue)	CR 581/Bruce B. Downs Boulevard (30th Street) to Morris Bridge Road	Widen (4 lanes to 6 lanes divided)	Needs Assessment Project for New Capacity: Non-SIS Major Corridor	Imagine 2040: Hillsborough LRTP
I-275	Jefferson Street/Orange Avenue to north of Bearss Avenue	Add 2 Express Toll Lanes	Cost Feasible Strategic Intermodal System Project	Imagine 2040: Hillsborough LRTP
I-75/SR 93A	SR 674 to north of I-75/I-275 Apex	Add Express Lanes	Strategic Intermodal System 2040 Needs Project	Imagine 2040: Hillsborough LRTP
I-75/SR 93A	SR 582 (Fowler Avenue) to CR 581/Bruce B. Downs Boulevard	Widen (4 lanes to 6 lanes freeway)	Transportation Improvement Program - Hillsborough County and FDOT	MPO (Fiscal Years 2015/16-2019/20)
SR 583 (N 56th Street)	E 23rd Avenue to south of Fowler Avenue	Resurfacing	Capital Improvements	Temple Terrace Comp. Plan

NOTE: ADDITIONAL IMPROVEMENTS/PROGRAMS: (1) CITY OF TAMPA UNIVERSITY (USF) AREA/BUSCH BOULEVARD ATMS PROJECT INCLUDES AN UPGRADE OF THE TRAFFIC SIGNAL SYSTEMS AT 40 INTERSECTIONS - MANAGED BY FDOT (HILLSBOROUGH FY 2015/16 - 2019/20 TRANSPORTATION IMPROVEMENT PROGRAM). (2) TRAFFIC SIGNAL UPDATES HAVE BEEN IDENTIFIED FOR SR 582 (FOWLER AVENUE) AT RAIN TREE BOULEVARD, GILLETTE AVENUE, AND N RIVERHILLS DRIVE - MANAGED BY FDOT (HILLSBOROUGH FY 2015/16 - 2019/20 TRANSPORTATION IMPROVEMENT PROGRAM). (3) THE CITY OF TEMPLE TERRACE HAS PREPARED AN AMERICANS WITH DISABILITIES ACT (ADA) TRANSITION PLAN DESIGNED TO BRING SIDEWALKS AND GOVERNMENT BUILDINGS INTO COMPLIANCE WITH THE ADA OF 1990.

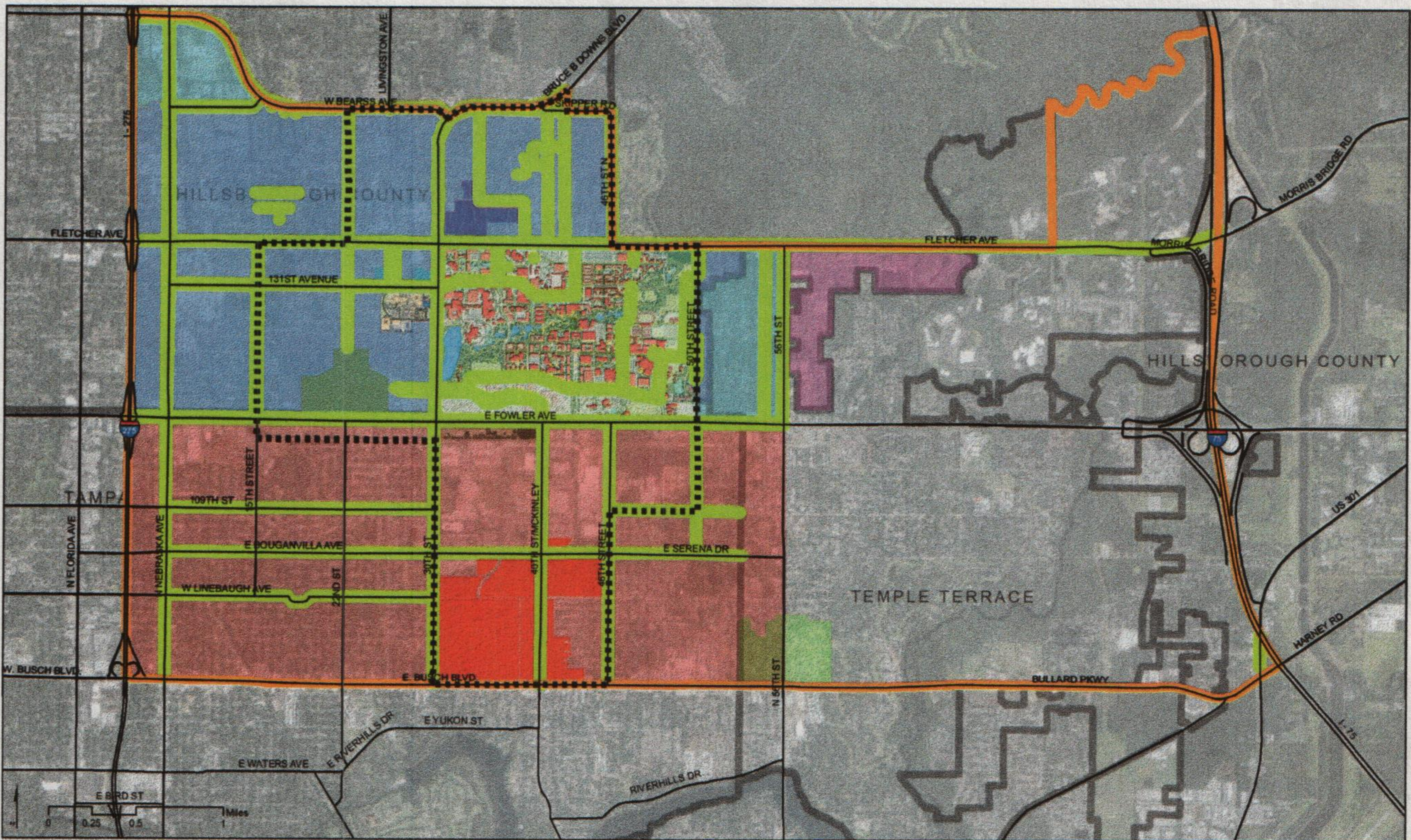


FIGURE 4.21
COMBINED MASTER PLAN

SOURCE: AECOM, 2015

COMBINED MASTER PLAN LEGEND

- Major Roads
- ▬ Planning Study Area
- ▬ Corridor Improvement
- ▬ University Area Community Plan
- ▬ Innovation District Core
- ▬ Jurisdiction
- ▬ MMTD Study Area
- ▬ Terrace Park-University Square Vision Plan

Combined Master Plan

The Planning Study Area has been the subject of a variety of planning efforts. Corridor studies as well as individual stakeholder Future Vision Plans have been created. Each vision plan is unique to the individual organization (Hillsborough County, FDOT, Hillsborough MPO, City of Tampa, City of Temple Terrace, Busch Gardens, University of South Florida, Moffitt, Florida Hospital and the University Mall to name a few). The Vision becomes a plan (development tool) for each organization's future and is often more 'strategically inward' focused rather than externally to a community focus.

Figure 4.21 combines the known Future Vision Plans for each major stakeholder along with the known corridor (roadway) improvements into an overall Combined Master Plan for the Planning Study Area. The Combined Master Plan does not include wider regional or jurisdictional plans unless they call out specific projects in the Planning Study Area. The combined Master Plan shows the opportunity for new roadway and open space connectivity, Land Use agencies, and community development nodes of opportunity. These opportunities are further discussed in the following chapter: Recommendations and Next Steps.

The Planning Study area and the Innovation Alliance will not only need to make physical improvements (such as an improved transportation network and open space system), but they will need to come to consensus on one strategic vision for the area that incorporates each of their own unique plans as well.

USF

In its 2010 Campus Master Plan, The University of South Florida projected enrollment to grow by an average of 1.3 percent annually from 2009 to 2020, bringing total enrollment from 40,267 to 45,936. The plan anticipates growth in parking demand by 11 percent, with weekly average parking demand during peak periods to increase by 91.1 percent, bringing the parking to near capacity. It identified underdeveloped properties (defined as vacant, surface parking, golf, or one- and two-story buildings), and identified planned facilities—including 1.64 million square feet of academic buildings, 1.04 million square feet of health buildings, 762,750 square feet of student housing, 1.1 million square feet in parking garages, 552,500 square feet in support buildings, and 25,000 square feet of athletic buildings. In the goals of the plan, there is a goal to "Build a sustainable campus environment at USF that meets the criteria for Carnegie classification as a "primary residential" campus." The 2013-2018 Strategic Plan mentions

"social, economic, and environmental sustainability" and a "first-class" physical infrastructure and a safe campus environment" as values of USF.

USF Research Park

The USF Research Park issued an update to its master plan in 2009. It updated build out capacity and suggested a more "urban" feel than the previous plan. The Master Plan Update includes two future development capacity scenarios. The first is a "maximum" potential development of the site with approximately 2.3 million gross square feet of new research space, a 350 room hotel and approximately 540,000 gross square feet of development to remain, resulting in as much as 3.5 million gross square feet of future development and a Floor Area Ratio (FAR) of 0.87. The second scenario had an overall lower density, with approximately 936,000 gross square feet of new research space, a 350 room hotel and approximately 540,000 gross square feet of existing development to remain, resulting in total development of 1.7 million square feet and an FAR of 0.48. The property south of Fowler showed 275,000 square feet of single-story buildings and 570 surface parking spaces. It also showed a proposed transit stop at that location.

Veterans Administration

The Veterans Administration is planning to construct a new 220,000 square foot bed tower with private rooms.

Florida Hospital

Projects at Florida Hospital include a recently-opened \$70-million emergency department and intensive care unit (ICU) with 22 new ICU beds and 58 ER beds. The Women's and Children's hospital project has a dedicated ER entrance, and beds, enhanced surgical capacity, relaunched obstetrics service line and a full renovation and expansion of the natal intensive care unit (NICU)—an expansion costing \$13.25 million. The hospital also has a project for surgical advancement and specialty nursing units to stay competitive within the marketplace, including a 22-bed PCU above the ICU and advanced specialized surgical procedures. The total cost for that project is \$34.2 million.

Busch Gardens

Though there are no master plans provided for Busch Gardens, park management reported that the park has been planning a retail, food, and entertainment "town center" development along McKinley as well as a possible 5 to 6-story parking structure.

Moffitt Cancer Center

The master plan for the Moffitt Cancer Center was not made available for this study, but in discussions with the representatives, it was discovered that there are 10.2 acres left for growth under the master plan. They project growth at 4 to 5 percent in the medium term and 3 percent in the longer term. An economic and fiscal impact study prepared for Moffitt suggested direct employment would increase from 4,455 in FY 2015 to 4,608 in FY 2018.

05

Recommendations and Next Steps

The objective of the Innovation Alliance Planning Study Area is to build upon the issues and opportunities identified by key stakeholders, Hillsborough County, city officials and previous planning documents. Specifically, this relates to the recognition that the organization, appearance, functionality and resource efficiency of the area is supportive of a vision for today and into the future. The design and function of the area also has a bearing on the safety, orientation and efficiency of use that allows the Planning Study Area to better serve changing populations today, while identifying and preserving opportunities for future investment and growth.

The planning team spent two days discovering the Strengths, Weaknesses, Opportunities and Threats (SWOT) of the area by conducting stakeholder interviews, facilitating small group discussion and observing the area through an extensive site visit. Figure 5.1 summarizes the findings.

The Land Use and Planning Context section identified the key challenges that will frame the development of the Innovation District planning process. This process must address ways in which to overcome the piecemeal development patterns and commercial strips that sprawl along the major corridors with separate curb cuts for dozens of individual entities. During the interviews, each key

stakeholder presented to the consultant team their current and future vision for their landholding/ organizations. These great visions are inwardly focused, minimizing an outward address to the community. This creates islands of great planning with minimal connectivity to local and regional networks. The sense of place is lost and the ability to create regional amenities and community value is minimized. A human sense of scale is also lost. This development pattern lends itself to larger blocks, creating a need to use the automobile as the primary mobility choice. The transportation network lacks internal connectivity (see Figure 5.2), forcing cars on to major arterials and increasing congestion. Finally, the fractured jurisdictional boundaries require a level of coordination between jurisdictions that must continue to occur so the Innovation District can thrive in all three jurisdictions.

In an effort to jump-start the discussion on how to address these challenges, the planning team has developed some “starter ideas” which are basic goals intended to promote discussion on possible strategies and solutions that can address these challenges to the Innovation District and guide the next steps in the development of the plan.

The SWOT analysis provides an understanding of the Planning Study Area’s current and future state.

Strengths, Weaknesses, Opportunities & Threats for the Planning Study Area

The SWOT analysis helped to inform the planning principles and begin to shape an overall Planning Study Area vision.

Strengths and weaknesses are defined as the positive and negative aspects of the Planning Study Area as it exists today.

Opportunities are possibilities for future benefits if planning and execution are carried out effectively. Threats are things that could prevent planning and execution from being carried out effectively.



FIGURE 5.1
SWOT ANALYSIS

SOURCE: AECOM, 2015

Starter Ideas

- Improve safety of the area
- Improve transportation efficiency and connectivity
- Support and Attract new development and redevelopment

These starter ideas can be implemented by creating district frameworks to help guide decisions over time. In order to enhance the existing conditions of the study area, several overall features can be modified. These changes will create safe access for all users with convenient and well-designed facilities. Streets that provide travel options decrease traffic and increase the overall capacity of the transportation network by creating more connections between the various destinations in the study area. A district framework confirms development areas and establishes district nodes, corridors, and connectors. The framework can help establish opportunities to improve parallel network

opportunities and improve transportation efficiency. Frameworks help to develop a connected open space system to leverage the value of nearby natural systems as well as to identify places where it is appropriate to encourage a complementary mix of uses. Nodes can be created at strategic intersections, destinations, and areas of concentrated uses. Once defined, it is possible to create strategies to brand each node with a sense of place. Study area wide framework plans have been developed that propose recommendations to achieve the three starter idea goals for the following elements and principles:

Four initial framework principles have been identified:

1. Street Network
2. Multi-Modal Access
3. Open Space
4. Nodes, Development Areas, Corridors, and Connectors

STREET NETWORK

VISION

Streets are envisioned to be connected, support a variety of transportation uses, walkable, and calmed with wide sidewalks, shaded streetscapes, and landscaped medians.

Principle 1: Street Network

The Planning Study Area includes many opportunities for creating additional parallel network connections (see Figure 5.3). Some of these are as simple as reconfiguring intersections to make through traffic easier, while others would require redeveloping in the long term to include connections through the property. This will improve the flow of traffic through the area by providing alternative routes, keeping local trips off of major arterials, and shortening some trips within neighborhoods. In addition, a well connected street network may allow opportunities for repurposing of existing ROW to dedicated/protected bus lanes, bike lanes, and/or pedestrian corridors.

Streets within the Innovation District should be developed as “complete streets.” Complete streets are context sensitive and livable facilities that not only act as a piece of the transportation infrastructure, but also as public space. Complete streets slow traffic with the use of narrower lanes, pedestrian and bicycle facilities, landscaping, and on-street parking where appropriate. Complete streets can also act as gateways and brand corridors to create a sense of place in the area. (Projects to improve the quality of the streets for all users on 131st Street, 42nd Street, and 46th Street near USF have completed the Project Development & Environment phase whose funding is contingent on the GO Hillsborough initiative. These improvements incorporate the ideals of complete streets into the projects.) Similar complete streets projects should be developed on other streets within the Planning Study Area. Figure 5.4 shows a network of proposed complete streets connecting the Innovation District.

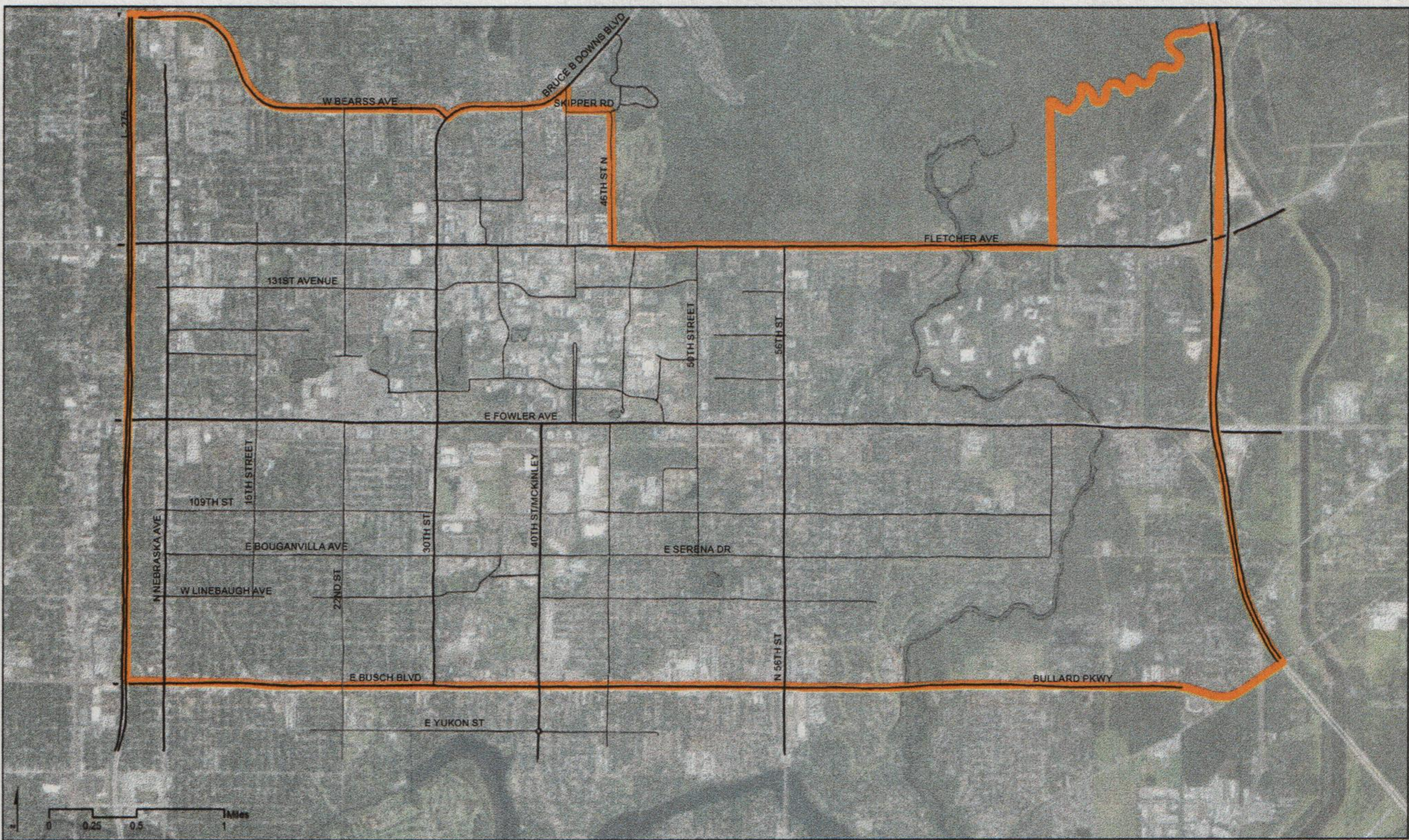


FIGURE 5.2
EXISTING ROADWAY NETWORK

SOURCE: AECOM, 2015

EXISTING ROADWAY NETWORK LEGEND

- Existing Roads
- ▭ Planning Study Area

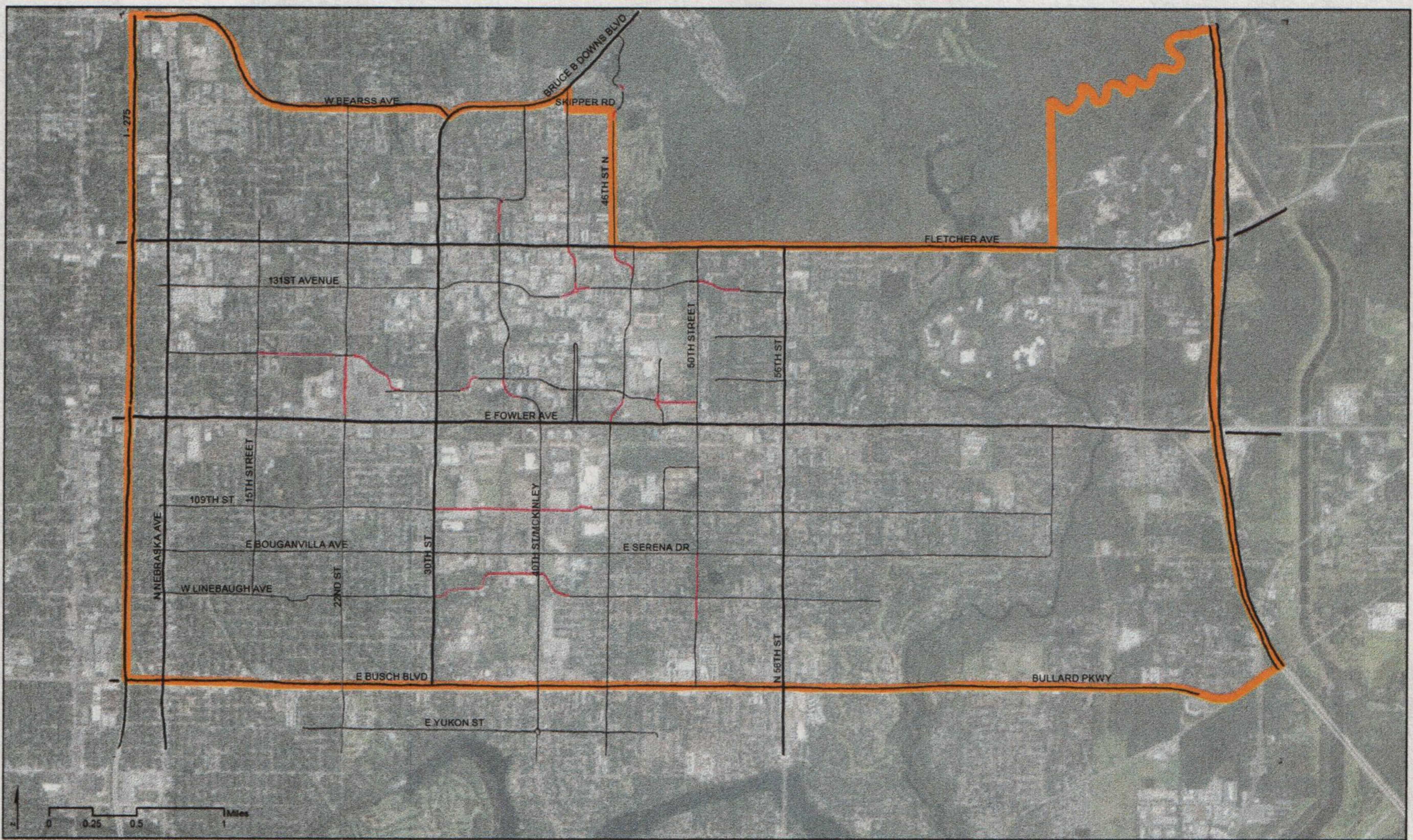


FIGURE 5.3
POTENTIAL ROADWAY NETWORK
CONNECTIONS

SOURCE: AECOM, 2015

POTENTIAL ROADWAY NETWORK CONNECTIONS LEGEND

- Potential Roads
- Existing Roads
- Planning Study Area



FIGURE 5.4
POTENTIAL FUTURE ROADWAY NETWORK

SOURCE: AECOM, 2015

POTENTIAL FUTURE ROADWAY NETWORK LEGEND

- Roadway Network
- ▭ Planning Study Area

MULTI-MODAL ACCESS

VISION

Create walkable, accessible, connected streets to support a multi-modal (walk, bike + transit), mixed-use place.

Principle 2: Multi-Modal Access

A main characteristic of a great place is accessibility, which promotes a high level of livability and allows for transportation efficiency and walkability. Several categories of transit have been identified. Each mode of transportation should have the opportunity to connect from a local network (such as pedestrians or the USF Bull Runner circulator) to a regional network utilizing the bus, interstate and rail opportunities.

Non-Motorized Transportation

Non-motorized transportation includes pedestrians (walking) and bicycles. These connections should be matched by improving the pedestrian and bicycle facilities by adding bike lanes, shared-use paths, bulb-outs and pedestrian refuge islands at crosswalks, and other facilities to improve pedestrian and bicycle safety. Landscape enhancements should be incorporated to provide comfort aesthetic interest to users. Large canopy trees can be placed adjacent to the roadway, separating vehicular use zones from pedestrian and bicycle zones. Street trees also have a tendency to lower automobile speeds and provide shade for pedestrians and bicyclists, enhancing comfort and encouraging the use of facilities. Places with higher frequencies of pedestrian and bicycle crashes and high activity areas should be identified as locations for safety

and aesthetic enhancements. These connections should be matched by improving pedestrian and bicycle facilities by adding bike lanes, shared-use paths, bulb-outs and pedestrian refuge islands at crosswalks, and other facilities to improve pedestrian and bicycle safety. Landscape enhancements that are 'Florida friendly' should be incorporated to provide comfort aesthetic interest to users.

Sidewalk connectivity in the Planning Area and Innovation District is important in creating a walkable, accessible and connected place. The GO Hillsborough proposed plan projects (April 20,2016) discusses safety improvements to intersections and sidewalks.

Sidewalks – New/Gaps. The study indicates that there is \$15 Million for various locations (not specified). 'Enhancement of pedestrian mobility through sidewalk construction, signing and pavement markings. Continuity of sidewalks provides pedestrians with safer travel options, increasing the overall health and mobility of residents and visitors.' <http://hillsboroughcounty.org/DocumentCenter/View/18548> , page 8.

In the next phase of the Innovation District planning process, there should be a comparison of deficiencies, gaps, and barriers to areas of activity (including employment centers), future land use/

development, and zoning. The corridors and intersections should be studied in more depth to improve the connections between sidewalks and bicycle facilities. Safety improvements visually identified could include mid-block crossings, increased visibility and appropriate lighting.

Pedestrian safety improvements may include:

- Marked crosswalks
- Smaller turn radii at key major intersections
- Places pedestrian in sight of on-coming motorists. (Better visibility)
- Shortens the crossing distance
- Larger landing areas
- Pedestrian refuge areas in the median
- Move the sidewalk away from the curb, creating a landscape buffer with shade tree opportunities to protect and separate pedestrians from higher speed vehicles.

Rail Transit

The existing CSX rail alignment is used for freight transportation through the area, and includes a spur line to the Yuengling Brewery. This corridor should

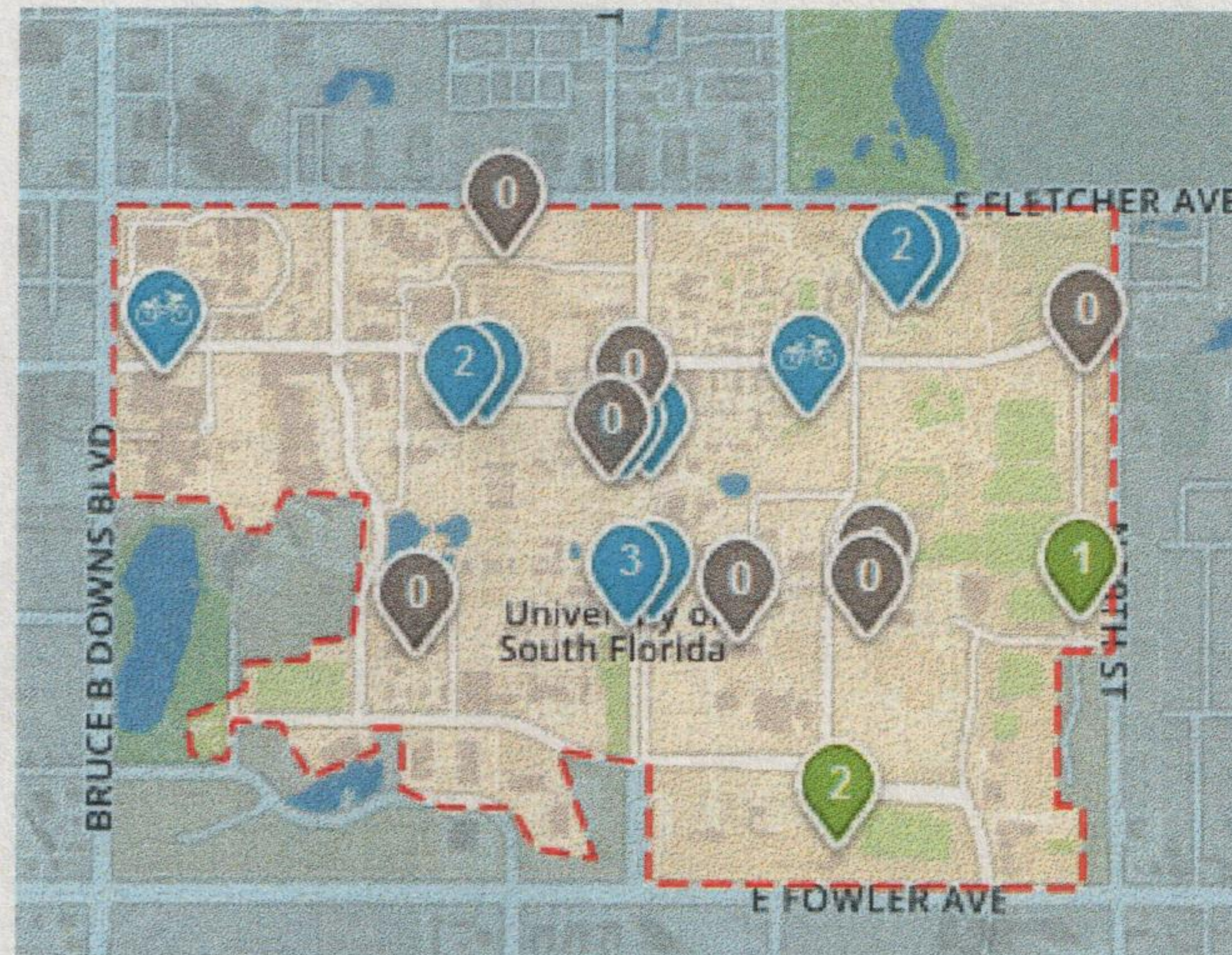


FIGURE 5.5
SHARE-A-BULL BIKES PROVIDES REAL-TIME
BIKE AVAILABILITY INFORMATION

SOURCE: USF.SOCIALBICYCLES.COM

be preserved as a potential future premium transit corridor connecting the Innovation District to Downtown Tampa and beyond. Opportunities to utilize the old rail tracks east of the active spur line should be evaluated as a component of any McKinley Drive redevelopment scheme. However, care should be taken to ensure that the freight operations of the railroad are not impacted without alternative freight transportation options.

Bus Transit

Bus service is provided by HART, with service on 10 local routes and one express bus route (see Figure 5.6). The Metro Rapid express bus service operates on 15 minute headways between Downtown Tampa, USF, and the Hidden River Park-and-Ride in the northeast corner of the Planning Study Area via Nebraska Avenue and Fletcher Avenue. Metro Rapid buses are equipped with transit signal priority and stations with bike racks and ticket vending machines. Additional local transit service is provided by the USF Bull Runner. This service provides USF students and people with a daily bus pass free rides throughout the Innovation District Core on six routes centered on the USF campus. Future changes to the transit services should focus on increasing service frequency and integration between systems.

Figure 5.6 shows existing transit accommodations and alternative transportation programs. In addition to these programs, there is the Busch Gardens Shuttle which offers round trip motor coach transportation from several convenient Orlando area locations to Busch Gardens. No information is available for a local shuttle service for the Planning Study Area. The Veteran's Association offers VTN, which was established to provide needed transportation for veterans seeking services from a VA facility and/or authorized facility. VTN guidelines permit volunteer participation in providing transportation to veterans using a volunteer's privately-owned conveyance or a government-owned vehicle, including donated vehicles, county vehicles, DAV Department (State) or Chapter (local) vehicles, public transportation and contracted transportation. There was no information available on shuttle or transportation services at Moffitt.

**FIGURE 5.6
EXISTING TRANSIT ACCOMMODATIONS & ALTERNATIVE TRANSPORTATION PROGRAMS**

HART LOCAL BUS ROUTE		
Route	Service Location	Route Number
Florida Avenue	Downtown to University Area Transit Center	1
Nebraska Avenue	Downtown to University Area Transit Center	2
40th Street	Downtown to University Area Transit Center	5
56th Street	Downtown to University Area Transit Center	6
15th Street	Downtown to University Area Transit Center	9
22nd Street	Downtown to University Mall/ University Area Transit Center	12
30th Street	Downtown to University Area Transit Center/ Livingston	18
Fletcher Avenue	Fletcher Avenue @ Dale Mabry Hwy. to University Area Transit Center	33
UATC/Rome Avenue/Westshore Plaza	University Area Transit Center to Westshore Plaza Transfer Center	45
UATC/Temple Terrace/Netpark	University Area Transit Center to Netpark Transfer Center	57
METRO RAPID		
Route	Service Location	Route Number
n/a	Downtown to UATC/Hidden River	N/A
BULL RUNNER		
Route	Service Location	Route Number
University Shuttle	USF Area	N/A
ALTERNATIVE TRANSPORTATION PROGRAMS		
Program	Link	Service
Borrow Our Bikes	http://usfweb2.usf.edu/CampusRec/outdoor/borrow.asp	Bike checkout - includes either a cruiser bike, mountain bike, or hybrid bike, along with bike lights, a helmet, lock, and key.
USF Carpool Program	N/A	The carpool must consist of two or more faculty/ staff commuting together or two or more students commuting together at least four (4) times per week to the USF Tampa Campus.

FIGURE 5.6 CONT'D
EXISTING TRANSIT ACCOMMODATIONS & ALTERNATIVE TRANSPORTATION PROGRAMS

ALTERNATIVE TRANSPORTATION PROGRAMS CONT'D

Program	Link	Service
Enterprise CarShare	https://www.enterprisecarshare.com/us/en/home.html	Enterprise CarShare is an automated way to rent a vehicle by the hour, the day, or overnight.
New North Transportation Alliance	http://www.newnorthalliance.com/	The New North Transportation Alliance (NNTA) is a public-private partnership in Northeast Tampa that provides a forum for businesses, local governments, residents, and commuters to address the transportation needs of the area.
Share-A-Bull Bikes	https://usf.socialbicycles.com/	The Share-A-Bull Bikes program, operated by Campus Recreation at USF, is a service in which bicycles are made available for shared use on a short-term basis on the USF Tampa campus. The convenient hubs for the bikes are positioned in high traffic locations around campus. An interactive map is available for the bike reservation (Figure 5.5).
Tampa BayCycle	http://www.tampabaycycle.com/	Founded in 2007, Tampa BayCycle was created by the joint efforts of the New North Transportation Alliance and the Tampa Downtown Partnership and funded by the Florida Department of Transportation.
Tampa Bay Ride Share	http://www.tampabayrideshare.org/	Support Carpooling, Vanpooling, Bike Buddy, Ride the Bus, Telework, Borrow Our Bikes, and Emergency Ride Home programs.
Red Coach	http://www.redcoachusa.com/	An express bus service to offer city-center to city-center travel, RedCoach U.S.A's terminals and bus stops are strategically located in key cities throughout Florida including on campus at USF
Zimride	https://www.zimride.com/usf/	Zimride is an easy way to share the seats in a car or catch a ride with the USF Net ID.

Automobile Transit

Automobile facility improvements should focus on compatibility with other travel modes. Figure 4.18 lists the current automobile transportation infrastructure projects within the Planning Study Area. Transportation Demand Management (TDM) strategies within the Planning Study Area should be evaluated (particularly as applied to employment centers) and opportunities to expand and implement TDM strategies should be identified. Additionally, the current access management policies should be evaluated to develop an overall concept to improve access management on Fowler Avenue, Fletcher Avenue, and Busch Boulevard.

In the next phase of the Innovation District planning process, there should be a comparison of deficiencies, gaps, and barriers to areas of activity (including employment centers), future land use/development, and zoning.

OPEN SPACE

VISION

The existing lakes, parks, and natural systems of the area become an important component of the community, connected through a series of trails and view corridors for passive recreation and nature observation, while creating economic value for existing and future development.

Principle 3: Open Space

Open space within this principle can be defined as areas that include natural features such as rivers, lakes, wetlands, wooded areas and flow ways. They can also include man-made amount parks and natural amenities. The Hillsborough River corridor is less than two miles south and east of the Innovation District Core, but for the most part is disconnected. Connecting this nearby natural amenity with trails and green spaces would be a way to leverage proximity to wetlands and the river as an amenity to improve the neighborhoods as shown in Figure 5.7. The bike trails/parkways follow secondary roads with lower traffic volumes and narrower cross-sections because of their more pedestrian scale.

Existing and future stormwater facilities can be integrated into this park system by amenitizing their shores with walking trails and trees. Additionally, it may be possible to integrate stormwater management into the park system. New parks built opportunistically to connect the park system can include additional stormwater facilities. These facilities can help improve the quality of new development by allowing nearby landowners to buy credits for the rights for the stormwater facilities. This way, smaller parcels can be redeveloped without requiring on-site stormwater storage by buying into an overall stormwater management banking system.

Open space should be designed as part of a linked system that is accessible to the entire community. Figure 5.8: Proposed Open Space System shows how such an integrated system of parks, stormwater facilities, and greenways become an integral component of the planning study area, connected through a series of trails, complete streets and view corridors for passive recreation and nature observation.

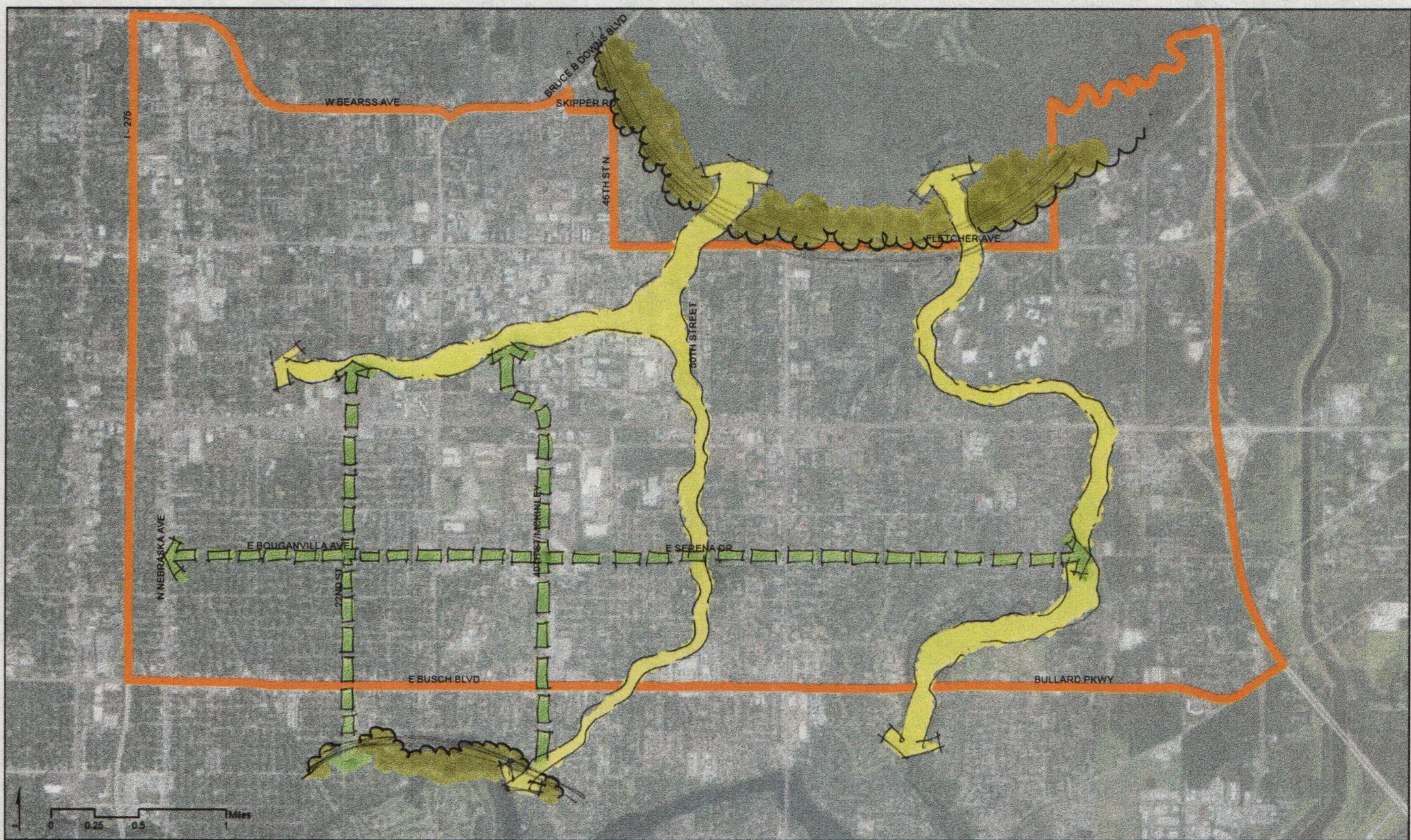
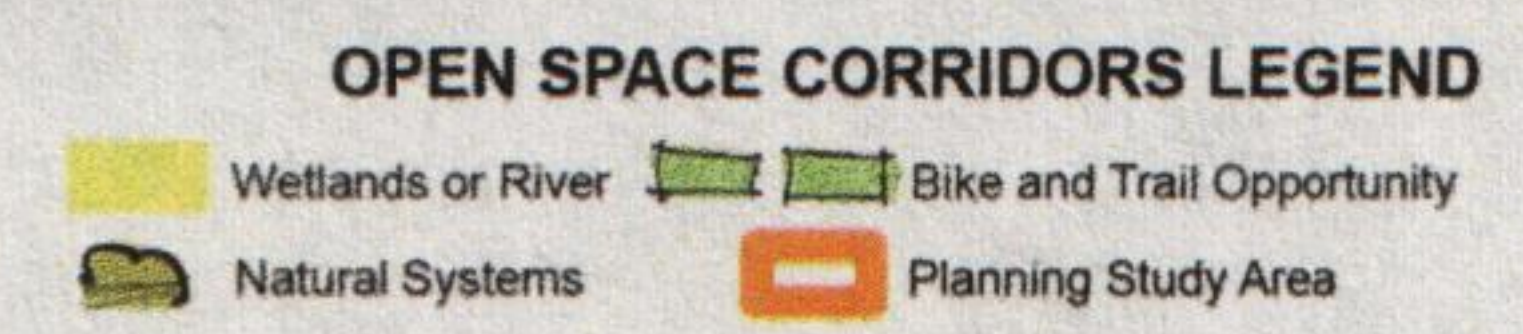


FIGURE 5.7
OPEN SPACE CORRIDORS

SOURCE: AECOM, 2015



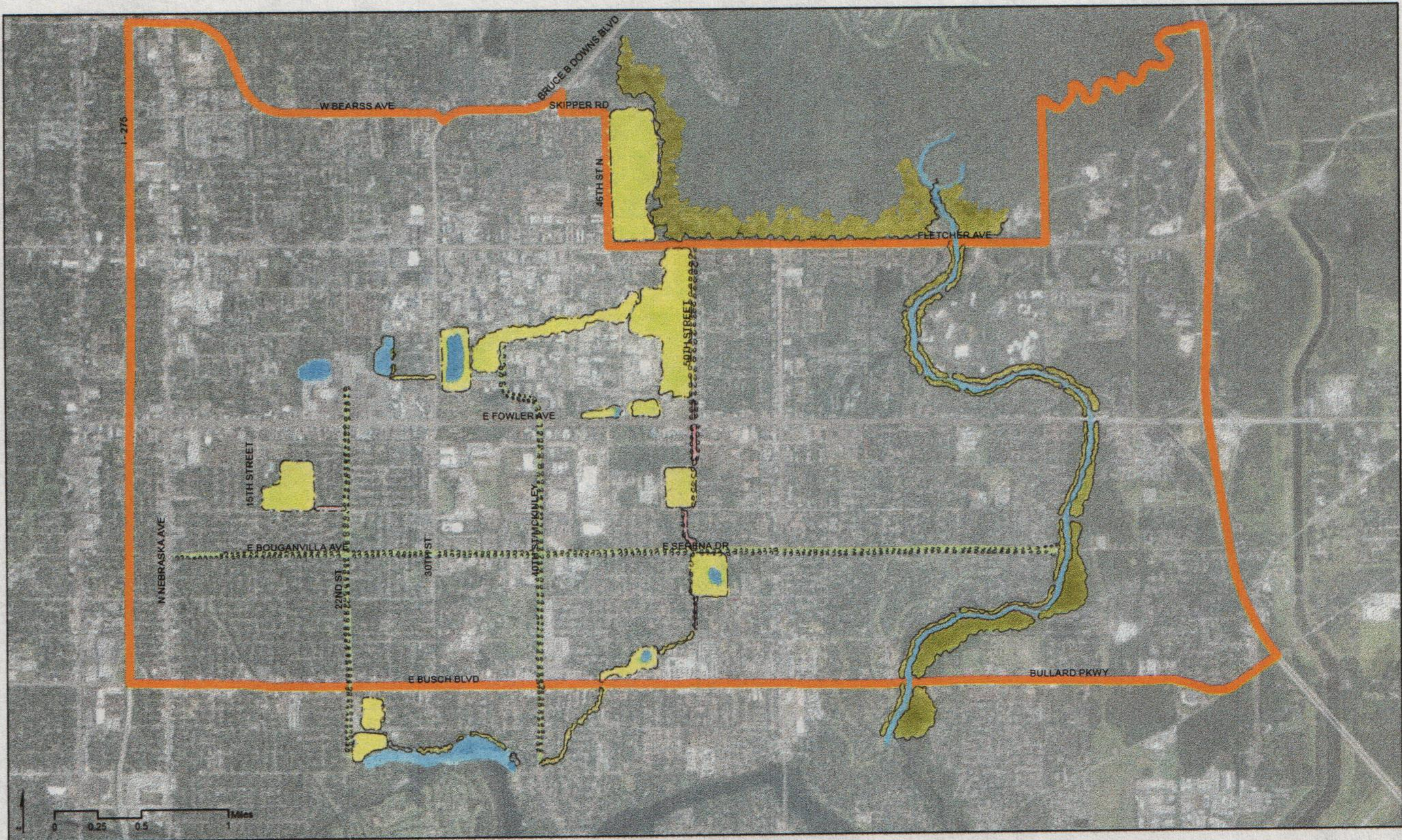


FIGURE 5.8
PROPOSED OPEN SPACE SYSTEM

SOURCE: AECOM, 2015

PROPOSED OPEN SPACE SYSTEM LEGEND

- Park/Greenspace
- Natural Systems
- Bike and Trail Opportunity
- Planning Study Area

DEVELOPMENT AREAS, CORRIDORS, AND CONNECTORS

VISION

Create a mixed-use district that includes entertainment, institutional, medical, and non-medical uses within a livable and economically vibrant setting.

Principle 4: Nodes, Development Areas, Corridors, Connectors and Gateways

The development area framework shown in Figure 5.9 envisions how to potentially organize development in the Innovation District, building on existing strengths and future opportunities to become a premiere center for research, education, entertainment, and retail—all while becoming a more livable district with strong neighborhoods offering a variety of housing options. This framework plan is centered on development nodes, creating distinct places at major intersections and destinations. Corridors (east/west primary roads) and connectors (north/south primary roads) help to define development areas and create a defined wayfinding system to build upon within the Innovation area. Gateways can add to the wayfinding system, branding the uniqueness and sense of arrival to the planning study area.

Nodes

Nodes are high activity areas within the planning study area. They can be defined as retail commercial, medical, technology or research in character. Nodes are within a 10 minute walking distance of all development areas. They are located at crossroads to maximize accessibility. They should encourage a greater mix of uses, and increased densities and intensities, creating a destination and

strong sense of place for each development area within the planning study area.

Development Areas

Development areas are focused around concentrated nodes. The development areas are not meant to be areas of a single use. Instead, they are meant to have a variety of supporting uses anchored by a general concept. For instance, the Medical Campus area is anchored by hospitals and the medical school. However, this area would also be an ideal location for other services that are complimentary to the hospitals such as services directed towards hospital workers or families of patients. Nodes should also provide goods and services that cater to people in nearby neighborhoods such as restaurants, grocery stores, and other basic retail uses. Likewise, the Entertainment Node near Busch Gardens should include both tourism and entertainment services complimentary to the theme park, but it should also include venues and services that appeal to locals so the node will remain active all day year-round.

Corridors and Connectors

Corridors and connectors frame the development areas and connect the activity nodes. (Corridors within this framework plan are east/west roadways and connectors are defined as north/south

roadways.) In addition to being complete streets that provide transportation options throughout the Innovation District, these corridors and connectors also have the ability to be branded and announce the arrival at nodes to travelers.

It is important to create engaging and comfortable environments for the multi-modal uses encouraged along the corridors and connectors. Today, the major corridors (Fletcher, Fowler and Busch Avenues) are defined by swath of pink and red on the future land use plan, depicting additional strip commercial and outparcels. The retail/commercial areas should be limited to the specific nodes, creating transitional areas into and out of nodes, such as ones defined by older towns along a roadway before the interstate system. This provides interest to transit dependent users and defines areas that are more concentrated with pedestrian and bicycle activities, alerting motorists to a change in context and awareness of surroundings.

Major corridors into the district such as Fowler Avenue from Interstate 75 to USF are a prime corridor for beautification and branding, with gateways and improved facilities for pedestrians and bikes (Figure 5.10). This corridor could be branded a 'research and technology corridor'. Busch Boulevard could be branded an 'entertainment' corridor and Fletcher Avenue could be branded as a 'medical' corridor. Other connectors, such as McKinley Drive could become a more pedestrian friendly branded corridor to connect Busch Gardens to USF, Moffitt Cancer Center, and Florida Hospital with branding, quality landscape design, and a mix of uses that transition from entertainment to research/light industry to institutional.

Gateways

Gateways provide identity to a place. They give a sense of arrival and first impression to the planning study area. Gateways can be architectural features, public art, lighting as well as landscaping and signage elements.

A project is currently underway by the Hillsborough MPO, FDOT, and the Innovation Alliance to create branded gateways at the Interstate 275 interchanges with Busch Boulevard and Fowler Avenue. These gateways will be a good first step towards creating branded corridors through the Planning Study Area. Similar gateways should be considered for other major entrances to the corridor as seen on Figure 5.10.

The development area framework is envisioned to help guide a future master plan for the area. There are many ways to approach this framework and it cannot be done by a single entity. It is important to collaborate with stakeholders and their organizations to build consensus and to gain community input. This collaboration and development framework plan can assist in creating a unified vision which should help guide decisions into the future.

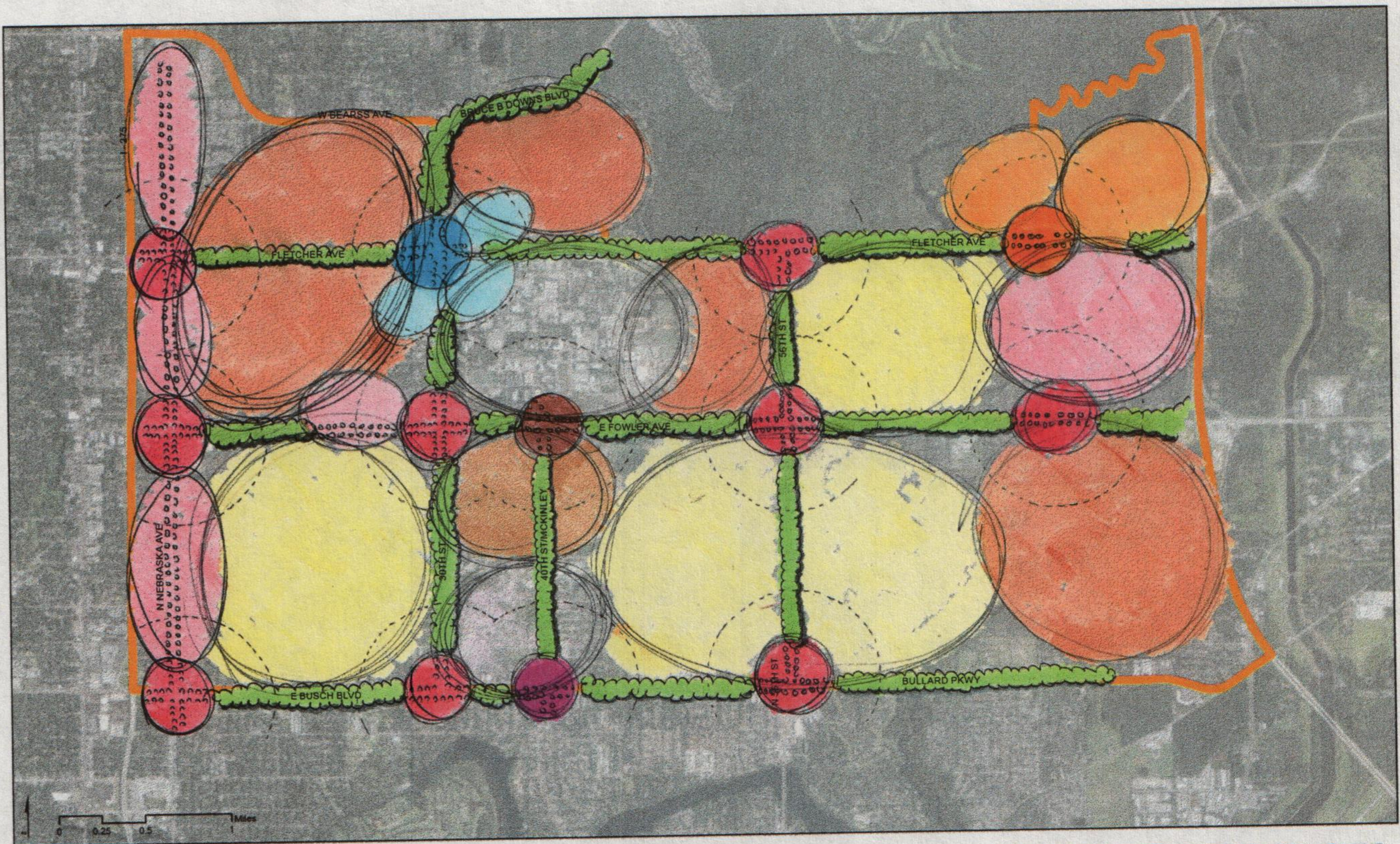
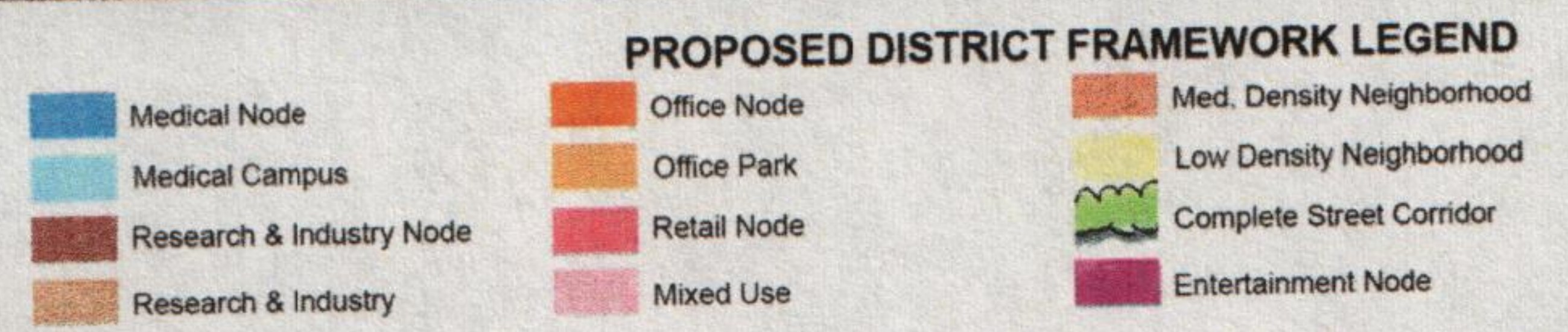


FIGURE 5.9
PROPOSED DISTRICT FRAMEWORK

SOURCE: AECOM, 2015



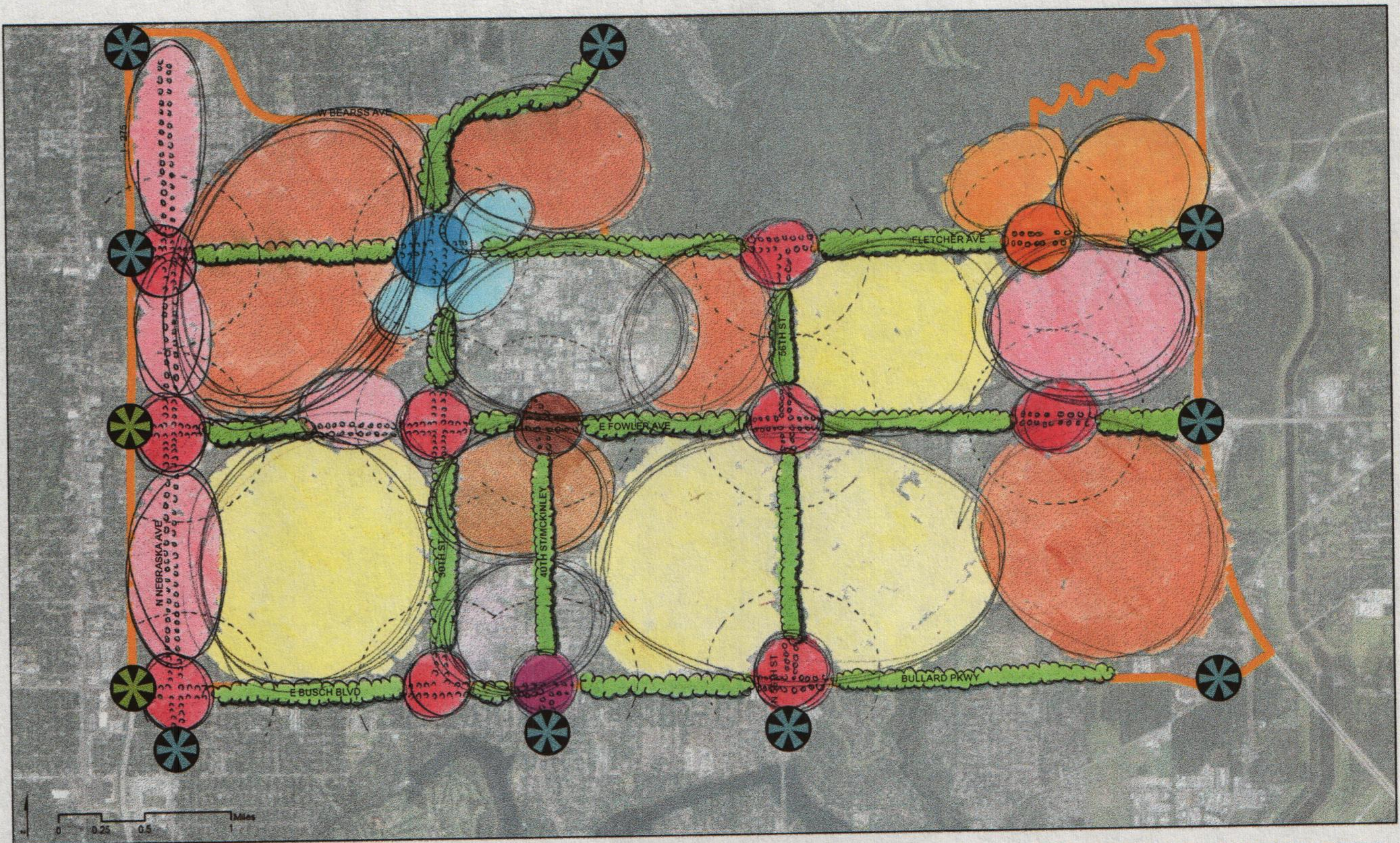
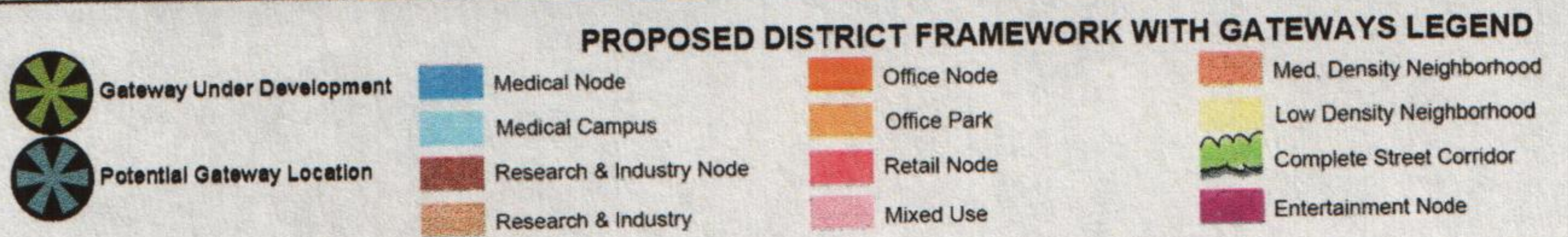


FIGURE 5.10
PROPOSED DISTRICT FRAMEWORK WITH GATEWAYS

SOURCE: AECOM, 2015



Appendix

Housing

Housing Tenure

The Innovation District Core and Planning Study Area are nearly the direct opposite of the City of Tampa, Hillsborough County, the Tampa-St. Petersburg-Clearwater, FL MSA, and the State of Florida. ESRI Business Analyst Online reports 91.4 percent of dwelling units in the Innovation District Core to be renter-occupied and 8.6 percent owner-occupied. In the Planning Study Area, 71.6 percent of dwelling units are renter-occupied and 28.4 percent are owner-occupied. Half of Tampa's dwelling units are owner-occupied. In Hillsborough County, 60 percent of dwelling units are owner-occupied and in the MSA 66.4 percent are owner-occupied. The MSA's housing tenure is more in-line with the State of Florida's housing, as seen in Figure A.1. High renter-occupied housing rates in the Innovation District Core and Planning Study Area can be attributed to students residing near the University of South Florida and the lower-income neighborhoods in these areas. With some Census blocks near USF having median household incomes of less than \$18,000, homeownership is most likely not an option. Figure A.1 shows a complete breakdown of housing tenures within the study area and its surrounding geographic regions.

Housing Occupancy

Housing occupancy, tenure, and housing values can reveal how a local economy is performing. With 78.6 percent occupancy, the Innovation District Core is underperforming in comparison to Hillsborough County, which currently has an 87.4 percent occupancy rate. The Planning Study Area and the MSA both have the same occupancy rates of 83.1 percent. All of the geographic jurisdictions analyzed have higher housing occupancy rates than Florida with the exception of the Innovation District Core, which only trails Florida by 0.9 percent. Given the nature of Florida's housing market and how it was affected by the housing bubble and Great Recession, Hillsborough County's housing market is performing well during the recovery.

Housing Values

Residential property values in the Planning Study Area and Innovation District Core are lower than those values in the City of Tampa, Hillsborough County, the Tampa-St. Petersburg-Clearwater, FL MSA, and the State of Florida. When looking at owner-occupied housing values, an overwhelming majority of homes in the Innovation District Core and Planning Study Area are worth \$149,999 or less, with 70.7 percent and 59.2 percent respectively. These percentages are high in comparison to Hillsborough County, which has 45.4 percent of owner-occupied homes valued at \$149,999 or less. In the State of Florida, 47.3 percent of owner-occupied homes are valued between \$150,000 and \$499,999. The Innovation District Core only has 29.3 percent of owner-occupied homes in this value range. The

**FIGURE A.1
HOUSING TENURE, 2015**

	RENT	OWN	% RENT	% OWN
Innovation District Core	9,025	846	91.4%	8.6%
Planning Study Area	24,353	9,656	71.6%	28.4%
Tampa	68,019	70,570	49.1%	50.9%
Hillsborough	188,411	282,929	40.0%	60.0%
MSA	378,540	747,425	33.6%	66.4%
Florida	2,351,983	4,806,997	32.9%	67.1%

SOURCE: ESRI BUSINESS ANALYST, 2015

FIGURE A.2
HOUSING OCCUPANCY, 2015

	HOUSEHOLDS	HOUSING UNITS	OCCUPANCY
Innovation District Core	9,870	12,550	78.6%
Planning Study Area	34,009	40,905	83.1%
Tampa	138,589	160,290	86.5%
Hillsborough	471,340	539,526	87.4%
MSA	1,125,965	1,355,310	83.1%
Florida	7,158,980	9,003,933	79.5%

SOURCE: ESRI BUSINESS ANALYST, 2015

homes are valued between \$150,000 and \$499,999. The Innovation District Core only has 29.3 percent of owner-occupied homes in this value range. The Planning Study Area has 37.9 percent of owner-occupied homes in this range. Overall, the City of Tampa has fewer owner-occupied houses that have lower values than the rest of Florida. Hillsborough County's distribution of owner-occupied housing values correlates with the State of Florida. The Innovation District Core and Planning Study Area both have more owner-occupied homes at the lower end of the housing values range; residential property values in the study area are lower than the rest of the region and the State. Figure A.3 shows a complete breakdown of the amount of owner-occupied housing values in each value range.

Similar to owner-occupied housing values, the Innovation District Core and Planning Study Area experience lower-than-average rent values for renter-occupied homes. A majority, 48.8 percent, of all renter-occupied homes in the Innovation District Core have rents between \$400 and \$699. In the Planning Study Area, 43.6 percent of all renter-occupied homes also have rents between \$400 and \$699. This is lower than the most common rent values in the region and the state. A majority of renter-occupied homes in Tampa, Hillsborough County, the MSA, and Florida have rent values between \$700 and \$999. All regions included in this analysis have a majority of renter-occupied rent values falling between \$400 and \$1,999 and minimal rent values in the <\$199 to \$399 and \$2000+ ranges.

While observing the owner-occupied housing value ranges and renter-occupied housing value ranges offers insight into the wealth of the study area, looking at median rent and median home values can provide an additional point of comparison between geographies. Figure A.4 shows the median rents and median home values of the geographies studied for the year 2015. The Innovation District Core and Planning Study Area have the lowest median rents. Both areas have rents lower than Tampa by at least \$105. Hillsborough County has a median rent that is comparable to the rest of Florida at \$812, which is 118 percent higher than the Planning Study Area's median rent. The same pattern follows with median home values. The Innovation District Core has the lowest median home value of \$102,734, which is \$57,266 less expensive than the median home value of Hillsborough County. The Planning Study Area has a higher median home value of \$120,783, which is still on the lower end of the spectrum when compared to Hillsborough County or the City of Tampa. The median home value of the Planning Study Area is halfway between the median home values of the Innovation District Core and the MSA.

Home Sales

Units Sold

Since January, 18,262 dwelling units have been sold in Hillsborough County and 24,063 in the Greater Tampa area. Figure A.5 shows the total dwelling units sold each month for Hillsborough County and Greater Tampa. Both regions had the highest number of units sold in June with 2,488 units sold in the County and 3,279 units sold in Greater Tampa. There has been a steady increase in units sold from January to June, and a slow decline in sales in the latter half of this year.

Days on Market

So far in 2015, dwelling units for sale have lasted an average of 69 days on the market in Hillsborough County and 74 days on the market in the Greater Tampa area. Figure A.6 shows the average number of days on the market a unit spends by month the unit was sold. Hillsborough County homes spend less time on the market on average in comparison to homes in the Greater Tampa region. Units sold in March had the highest number of days on the market with averages of 77 days and 84 days for Hillsborough County and Greater Tampa respectively. While the average number of days on the market has fluctuated in 2015, there is a slight downward trend meaning homes are being sold faster as the year goes on.

Average Sales Price

From Q1 to Q2, average sales prices rose for both regions. Hillsborough County's average sales price rose from \$187,307 in January to \$235,803 in June. Greater Tampa's average sales prices rose from \$188,168 in January to \$226,784 in June. Figure 3.30 shows how average sales prices have slightly fluctuated from July to September of this year. As seen in the other measurements of home sales, June was the best month for home sales in both regions. For both Hillsborough County and Greater Tampa, the most housing units were sold, they were sold the quickest, and sold at the highest sales prices.

**FIGURE A.3
HOUSING VALUES, 2015**

OWNER-OCCUPIED HOUSING VALUES

	Innovation District Core		Planning Study Area		Tampa		Hillsborough County		MSA		Florida	
<\$49,999	119	14.1%	1,406	14.6%	4,887	6.9%	23,492	8.3%	84,020	11.2%	464,733	9.7%
\$50,000-\$149,999	479	56.6%	4,310	44.6%	26,886	38.1%	105,004	37.1%	299,149	40.0%	1,738,419	36.2%
\$150,000-\$199,999	214	25.3%	1,719	17.8%	11,119	15.8%	53,194	18.8%	130,932	17.5%	803,613	16.7%
\$200,000-\$499,999	34	4.0%	1,940	20.1%	20,444	29.0%	86,041	30.4%	197,122	26.4%	1,469,504	30.6%
\$500,000-\$999,999	0	0.0%	247	2.6%	5,625	8.0%	11,913	4.2%	28,292	3.8%	244,205	5.1%
\$1,000,000+	0	0.0%	34	0.4%	1,609	2.3%	3,285	1.2%	7,910	1.1%	86,523	1.8%
Total	846	100%	9,656	100%	70,570	100%	282,929	100%	747,425	100%	4,806,997	100%

RENTER-OCCUPIED RENT VALUES

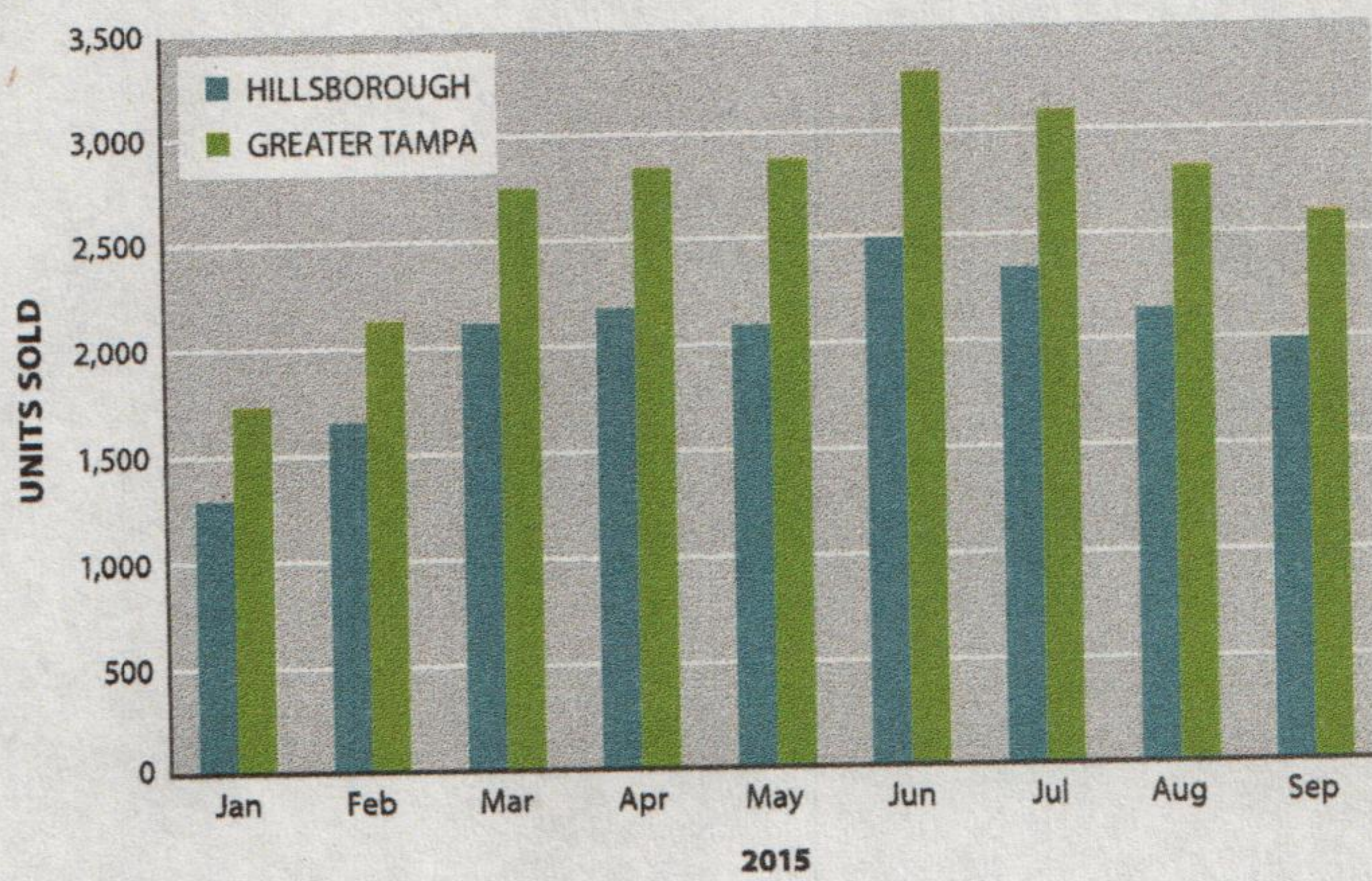
	Innovation District Core		Planning Study Area		Tampa		Hillsborough County		MSA		Florida	
<\$199	295	3.3%	875	3.6%	3,079	4.5%	4,824	2.6%	9,055	2.4%	65,325	2.8%
\$200-\$399	334	3.7%	993	4.1%	3,967	5.8%	7,308	3.9%	14,443	3.8%	100,416	4.3%
\$400-\$699	4,402	48.8%	10,630	43.6%	18,182	26.7%	49,341	26.2%	106,798	28.2%	566,278	24.1%
\$700-\$999	2,546	28.2%	8,381	34.4%	21,905	32.2%	69,284	36.8%	138,807	36.7%	792,799	33.7%
\$1,000-\$1,999	1,139	12.6%	2,755	11.3%	16,270	23.9%	46,029	24.4%	83,960	22.2%	637,083	27.1%
\$2,000+	154	1.7%	182	0.7%	2,366	3.5%	5,022	2.7%	9,737	2.6%	70,678	3.0%
No Cash Rent	156	1.7%	539	2.2%	2,250	3.3%	6,603	3.5%	15,740	4.2%	119,404	5.1%
Total	9,025	100%	24,353	100%	68,019	100%	188,411	100%	378,540	100%	2,351,983	100%

SOURCE: ESRI BUSINESS ANALYST, 2015

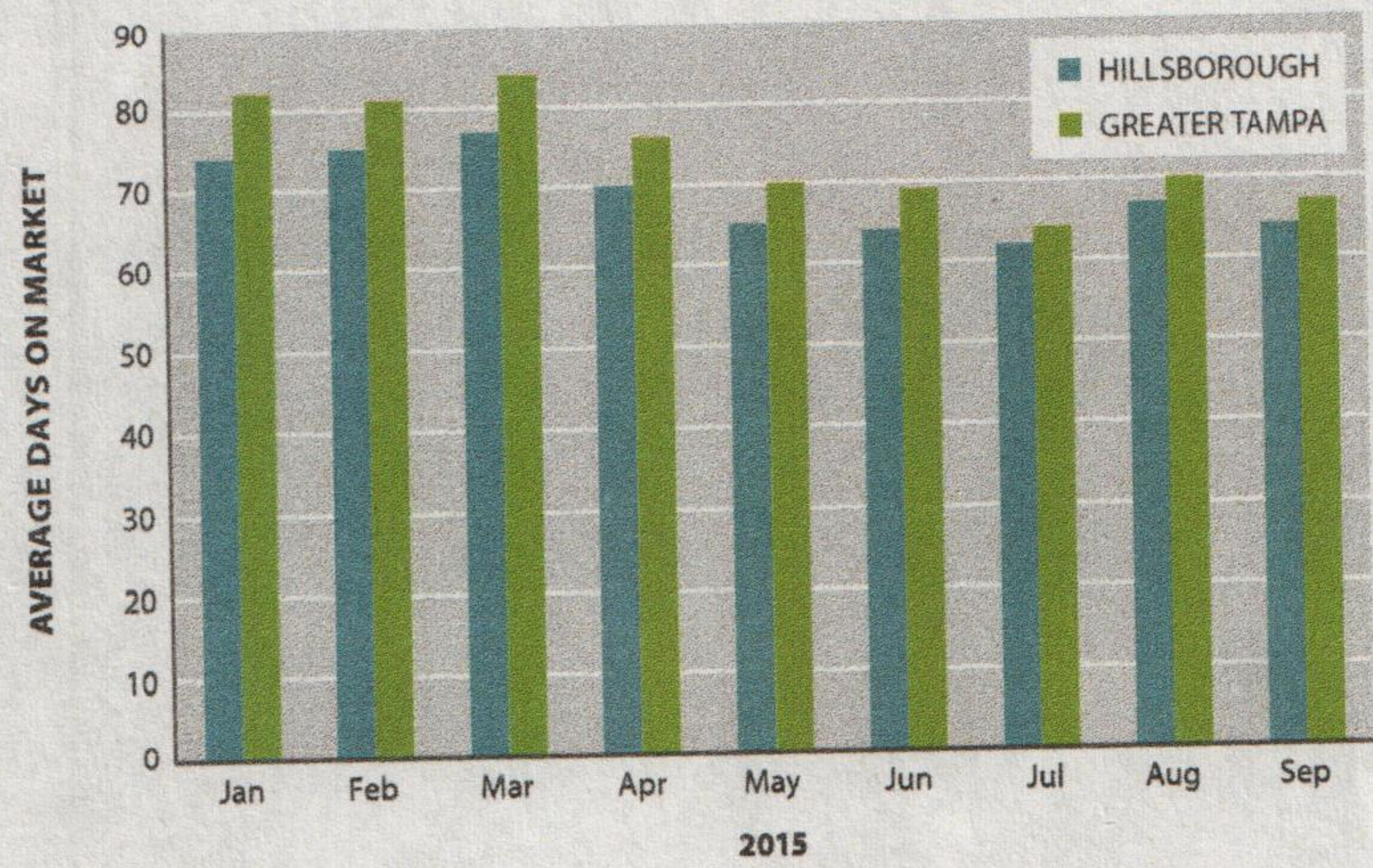
**FIGURE A.4
MEDIAN RENTS AND HOME VALUES, 2015**

SOURCE: ESRI BUSINESS ANALYST, 2015

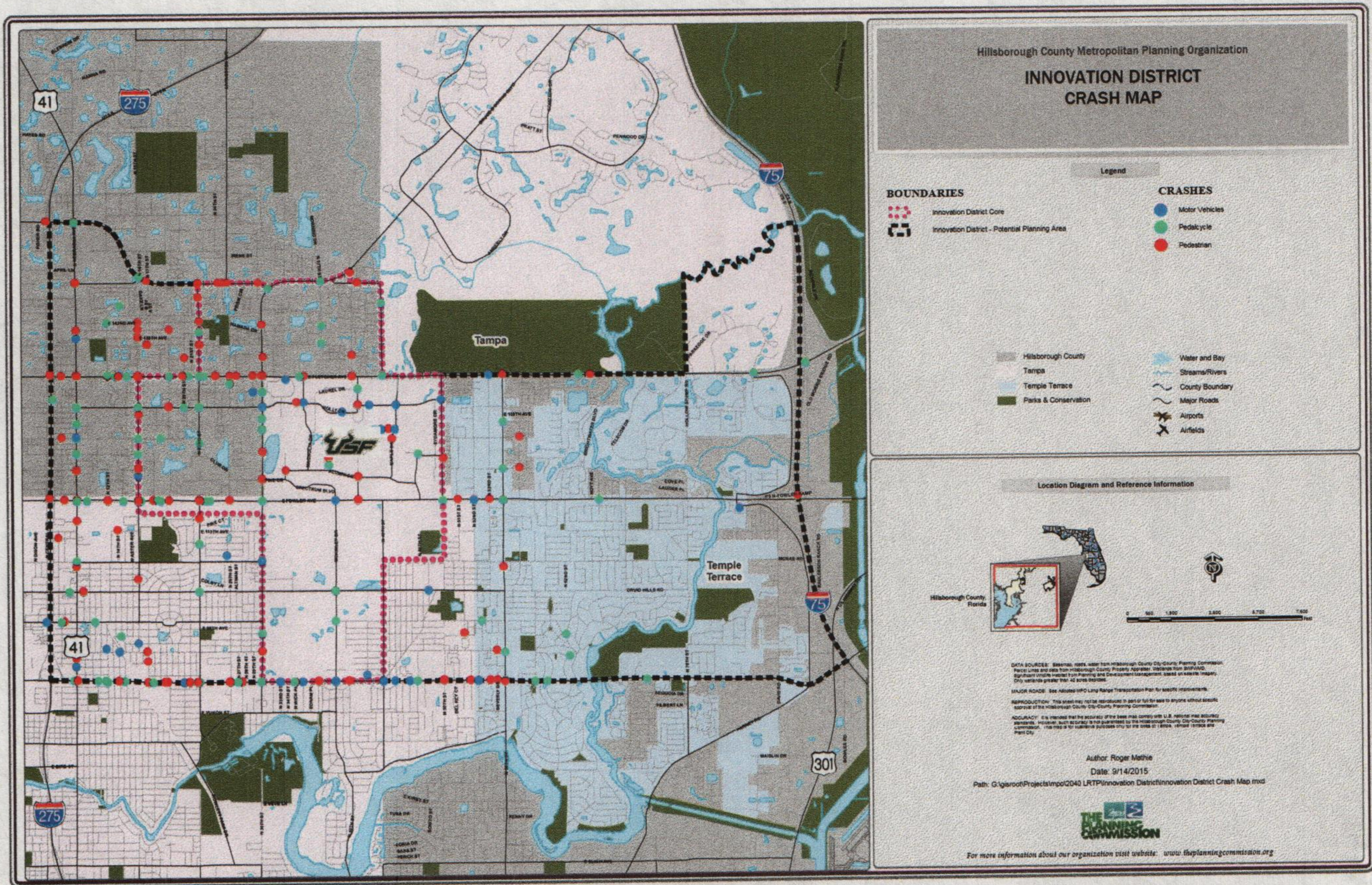
	MEDIAN RENT	MEDIAN HOME VALUE
Innovation District Core	\$669	\$102,734
Planning Study Area	\$686	\$120,783
Tampa	\$791	\$162,800
Hillsborough County	\$812	\$160,000
MSA	\$794	\$146,500
Florida	\$838	\$160,200



**FIGURE A.5
MONTHLY UNITS SOLD, 2015**

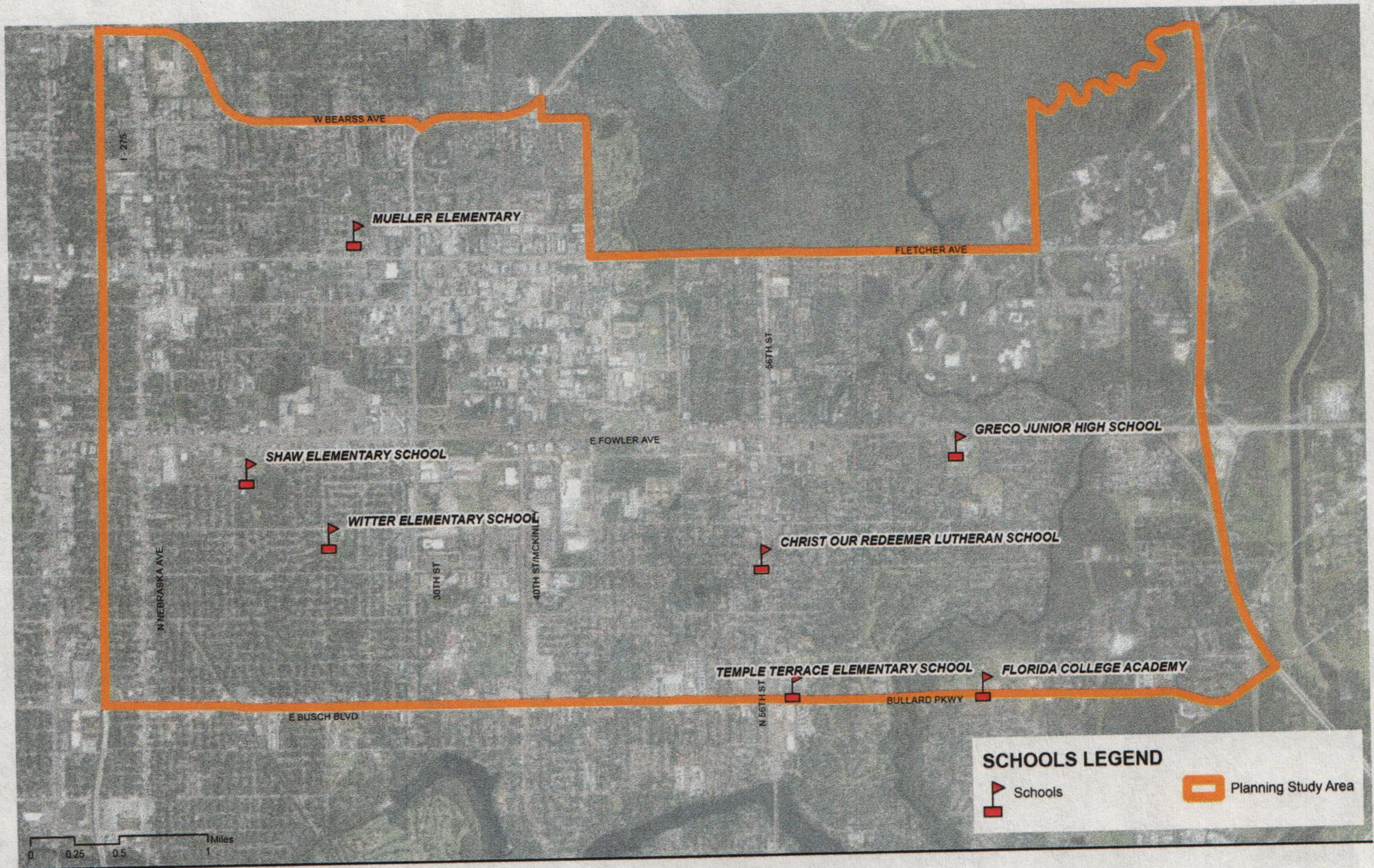


**FIGURE A.6
MONTHLY AVERAGE DAYS ON MARKET, 2015**



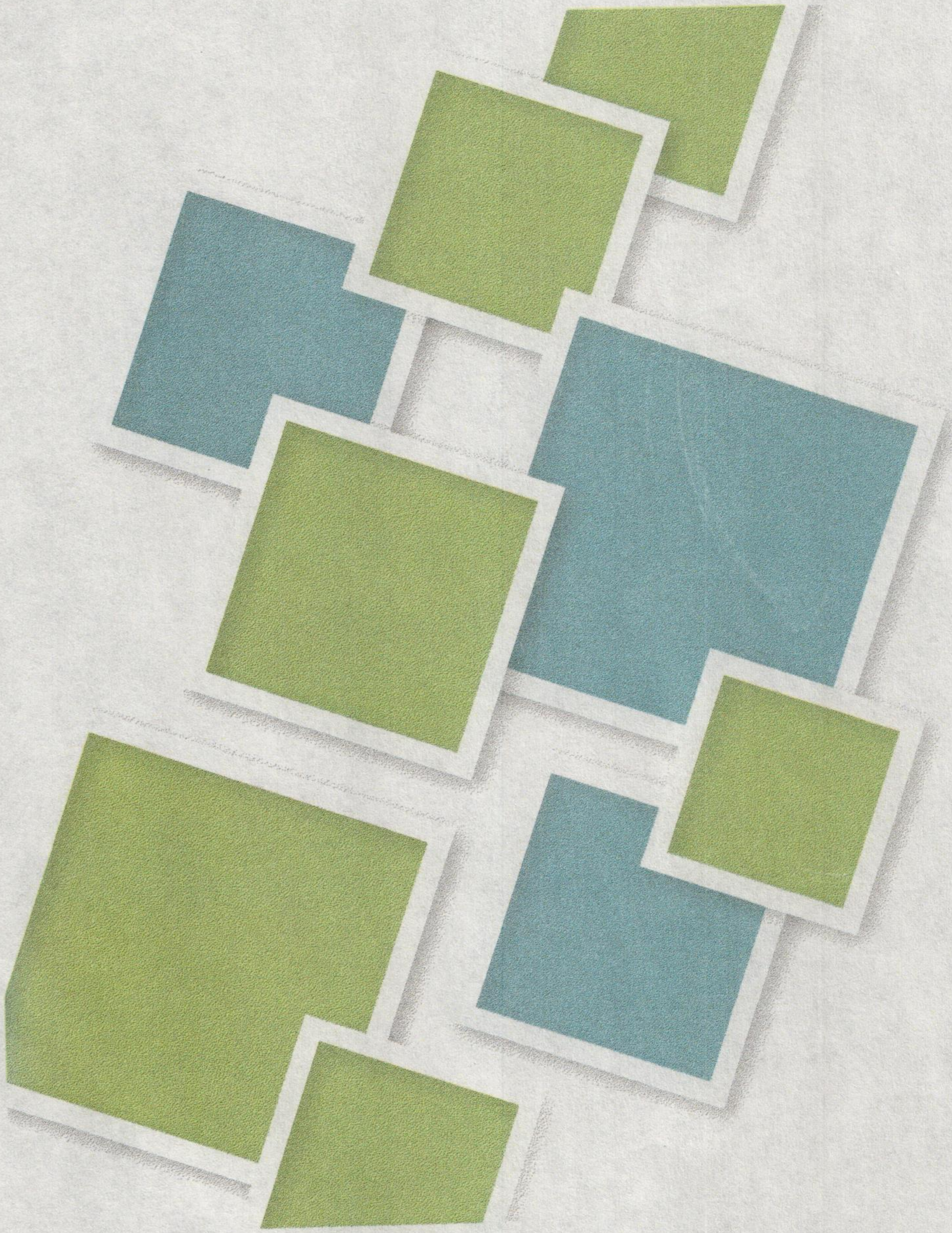
**FIGURE A.7
INNOVATION DISTRICT CRASH MAP**

SOURCE: HILLSBOROUGH COUNTY METROPOLITAN PLANNING ORGANIZATION, 2015



**FIGURE A.8
SCHOOLS IN INNOVATION DISTRICT**

SOURCE: FLORIDA GEOGRAPHIC DATA LIBRARY; AECOM, 2015.



Tampa
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