

YBOR CITY – EXISTING RETAIL BY CATEGORY



RESTAURANT & BARS



GROCERY



OTHER DISCRETIONARY



CLOTHING & ACCESSORIES



SPORTING GOODS, BOOK & HOBBIES



MISC, GIFTS & ARTS



PHARMACY / PERSONAL CARE

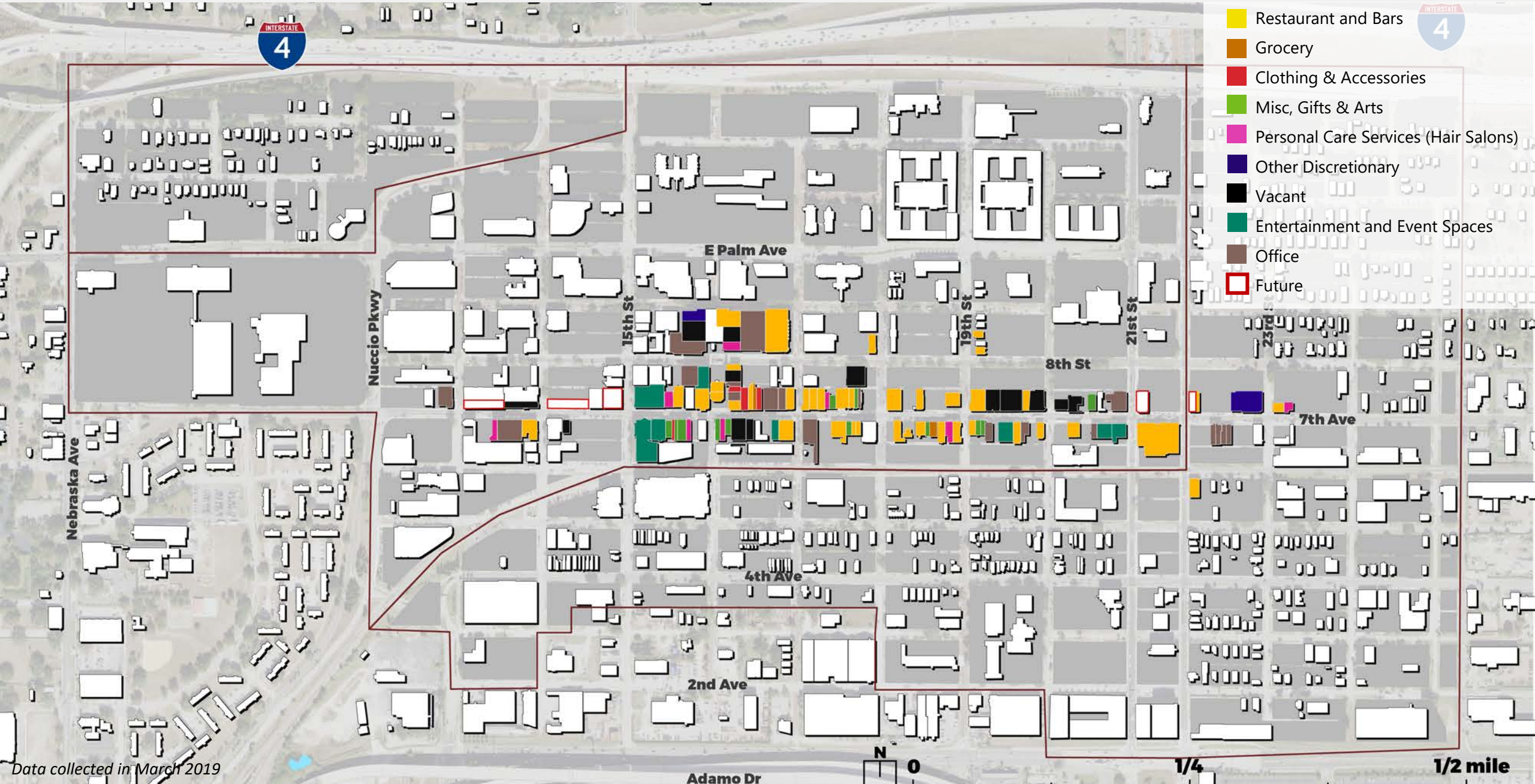


PERSONAL CARE SERVICES



VACANT

YBOR CITY – EXISTING RETAIL BY CATEGORY (1st Floor Only)

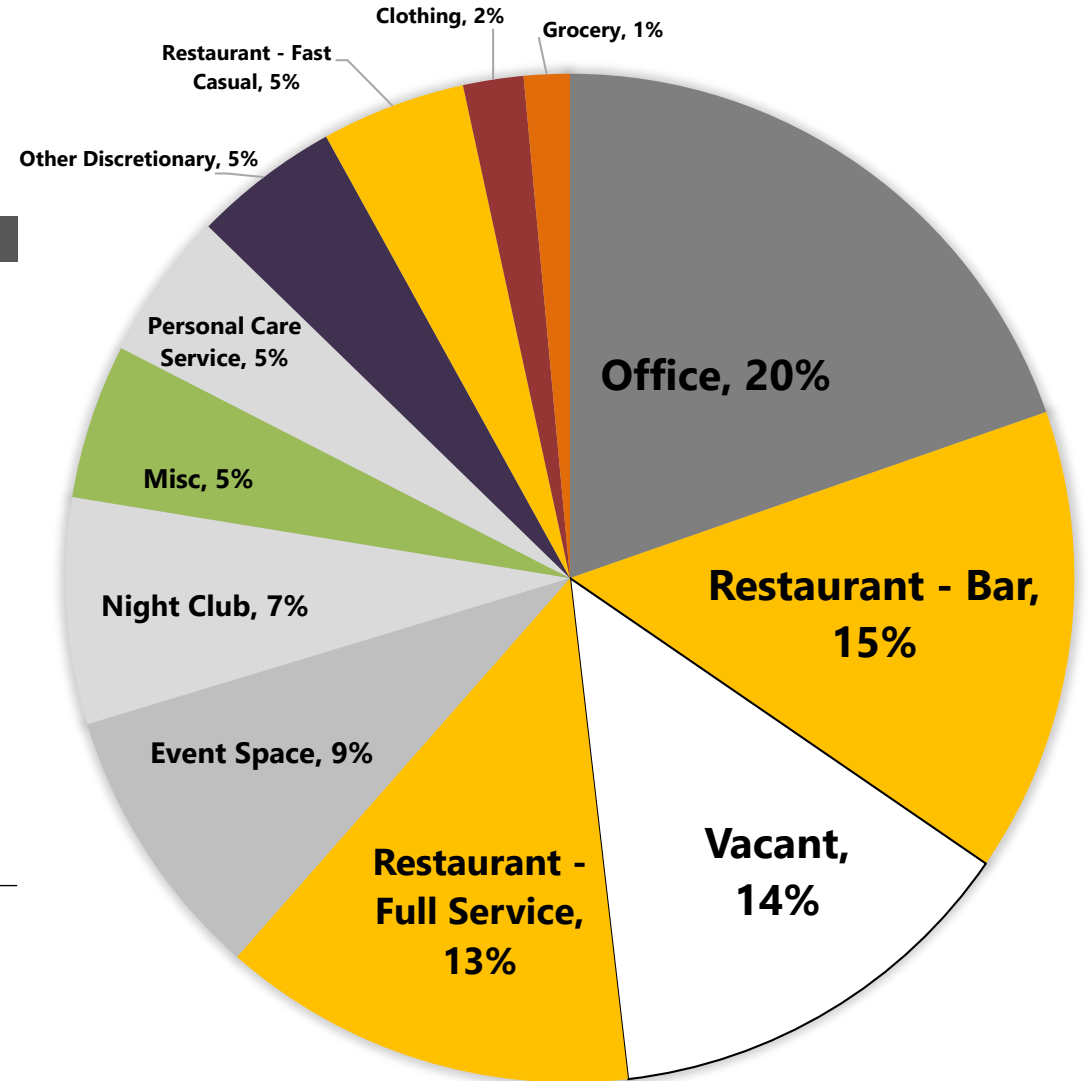


Data collected in March 2019

YBOR CITY – EXISTING RETAIL BY CATEGORY

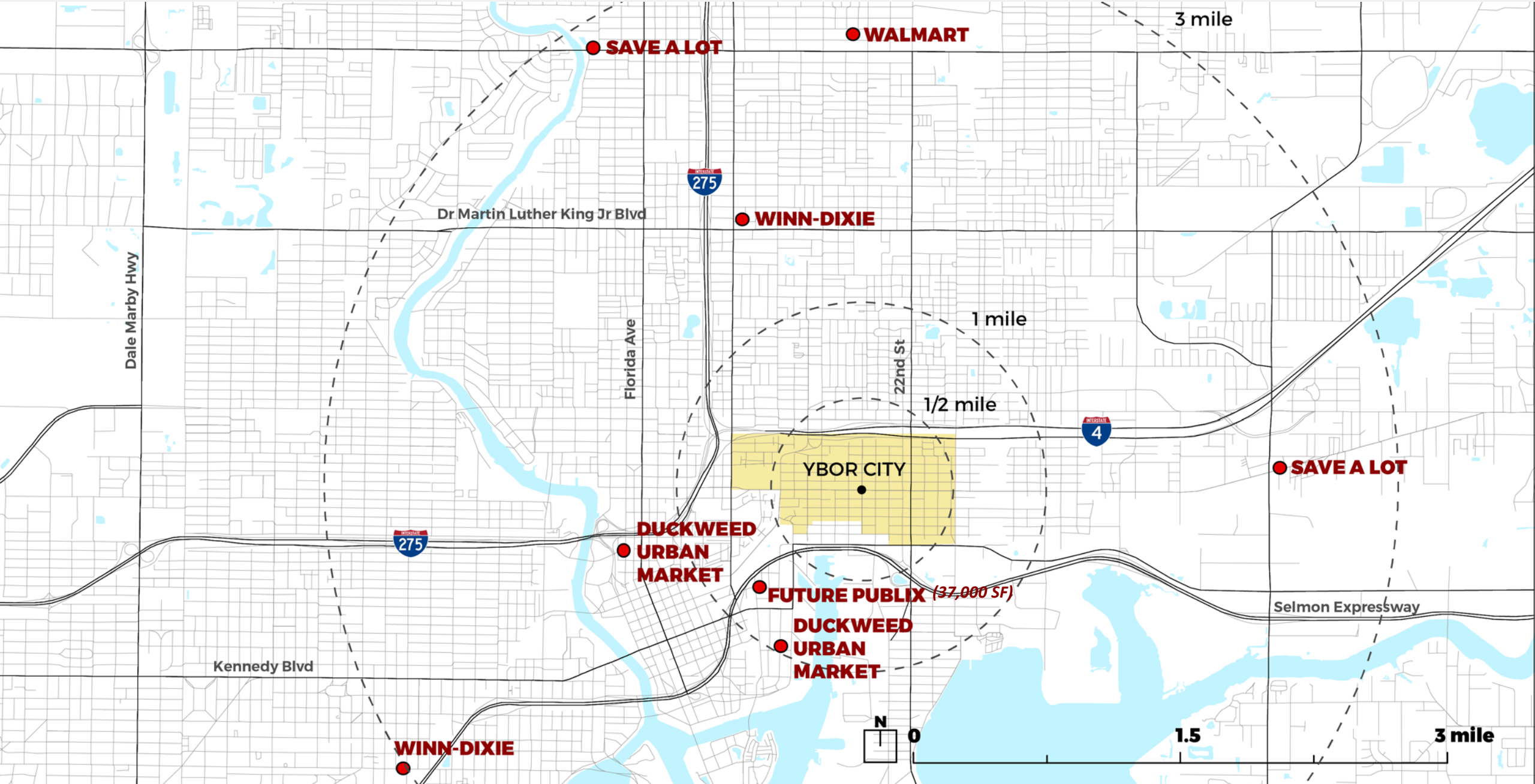
1st Floor Inventory Only

Category	SF	%	Example Tenants
Office	84,200	20%	AIA Tampa, Benz Modeling Agency
Restaurant - Bar	63,900	15%	Zydeco, Gaspar's Grotto
Vacant	58,200	14%	
Restaurant - Full Service	57,100	13%	The Acropolis, Carmine's, Berninis
Event Space	37,900	9%	Italian and Cuban Clubs
Night Club	31,100	7%	Prana, Bradley's, The Honeypt
Misc	21,300	5%	Cigar Shops, The Paper Seahorse
Personal Care (Hair Salons)	20,300	5%	Atomic, Ybor City Cuts, Tribeca
Other Discretionary	20,100	5%	West Elm, Design Interiors
Restaurant - Fast Casual	19,800	5%	La Creperie, Jimmy John's
Clothing	8,300	2%	La France, Revolve, Black-A-Denim
Grocery	6,300	1%	Ybor City Food Mart, 7 Eleven
	428,500		



* Categories in gray are not included in demand model

YBOR CITY – EXISTING RETAIL BY CATEGORY





VISITORS
YBOR City



EMPLOYEES
YBOR City



STUDENTS
Hillsborough Community College

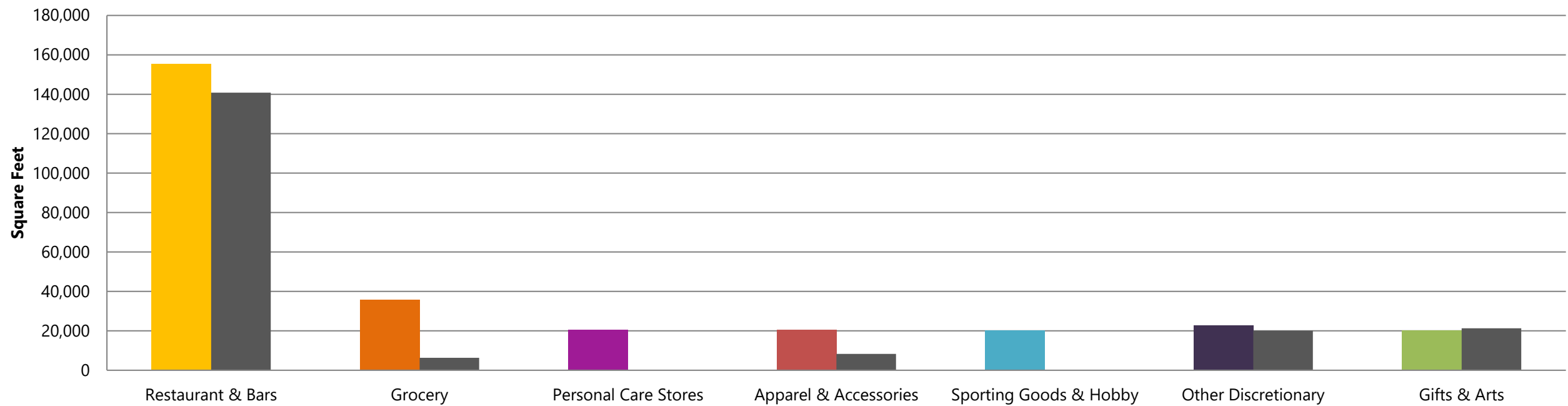


RESIDENTS
YBOR City



YBOR CITY – EXISTING RETAIL DEMAND

RETAIL BY CATEGORY								
	Restaurant & Bars	Grocery	Pharmacy / Personal Care Stores	Apparel & Accessories	Sporting Goods & Hobby	Other Discretionary	Gifts & Arts	Total
Demand (sf)	165,773	31,467	20,859	20,618	20,053	22,910	20,360	258,770
- Existing Supply (sf)	140,800	6,300	0	8,300	0	20,100	21,300	155,400
Current Unmet Demand (sf)	24,973	25,167	20,859	12,318	20,053	2,810	0	106,180 ←



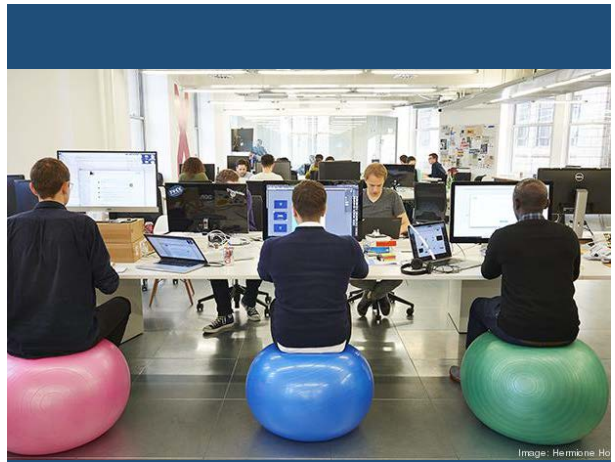
* Demand does not include future population, employment and tourism growth in the area.

YBOR CITY – 5-YEAR POPULATION GROWTH

Assume no growth



VISITORS
YBOR City

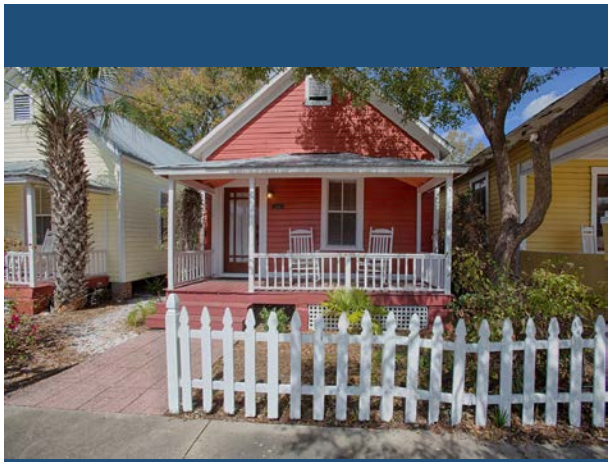


EMPLOYEES
YBOR City

Assume no growth



STUDENTS
Hillsborough Community College



RESIDENTS
YBOR City



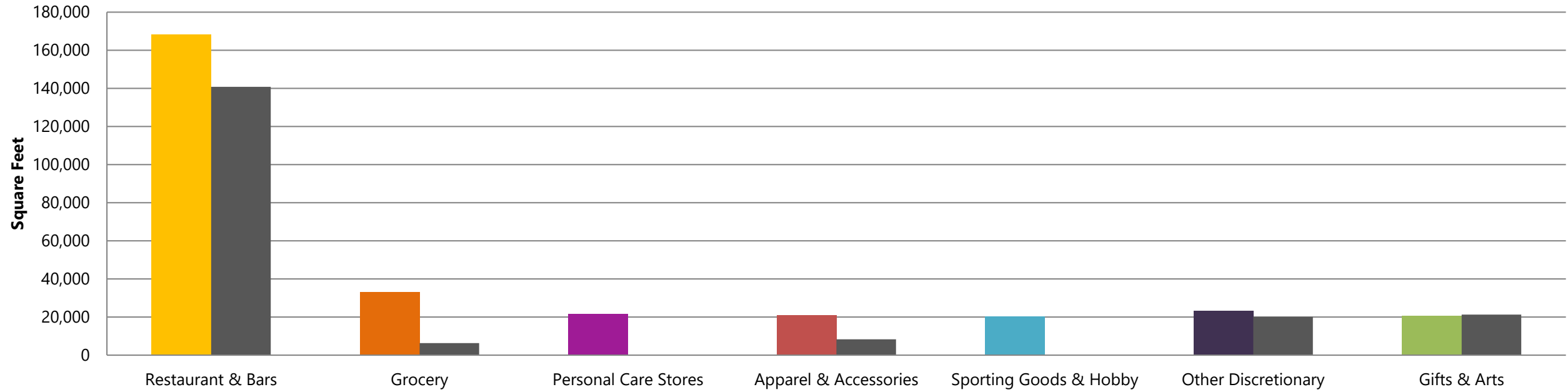
1.5% annual growth
Employees increase from 10,315 to 11,112

6.0% annual growth
Residents increase from 2,551 to 3,414

**Existing resident population from ESRI BAO, Existing employee population from Planning Commission, Growth Projections for resident and employee populations provided by Planning Commission.*

YBOR CITY – 5-YEAR FUTURE RETAIL DEMAND

RETAIL BY CATEGORY								
	Restaurant & Bars	Grocery	Pharmacy / Personal Care Stores	Apparel & Accessories	Sporting Goods & Hobby	Other Discretionary	Gifts & Arts	Total
Demand (sf)	168,210	32,992	21,534	20,849	20,198	23,254	20,532	263,783
- Existing Supply (sf)	140,800	6,300	0	8,300	0	20,100	21,300	155,400
Current Unmet Demand (sf)	27,410	26,692	21,534	12,549	20,198	3,154	0	111,537 ←



YBOR CITY – TOP RETAIL NEEDS BY MARKET AUDIENCE



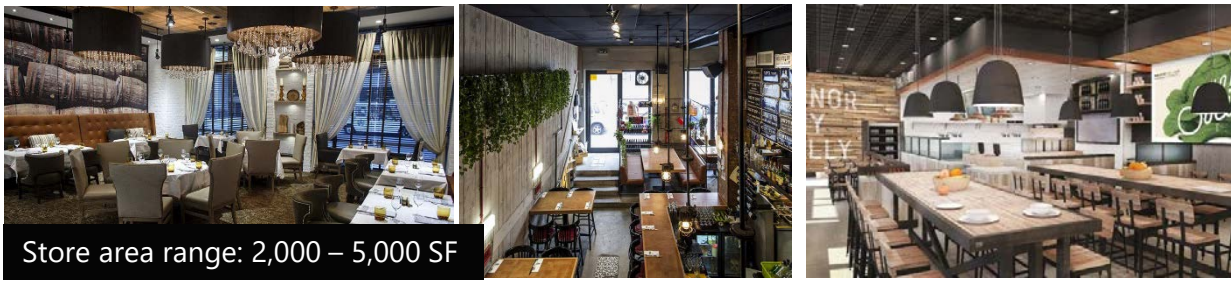
Fast Casual Dining / Cafes



Store area range: 500 – 1,500 SF

VISITORS EMPLOYEES STUDENTS RESIDENTS

Full Service / Specialty Restaurant



Store area range: 2,000 – 5,000 SF

VISITORS EMPLOYEES STUDENTS RESIDENTS

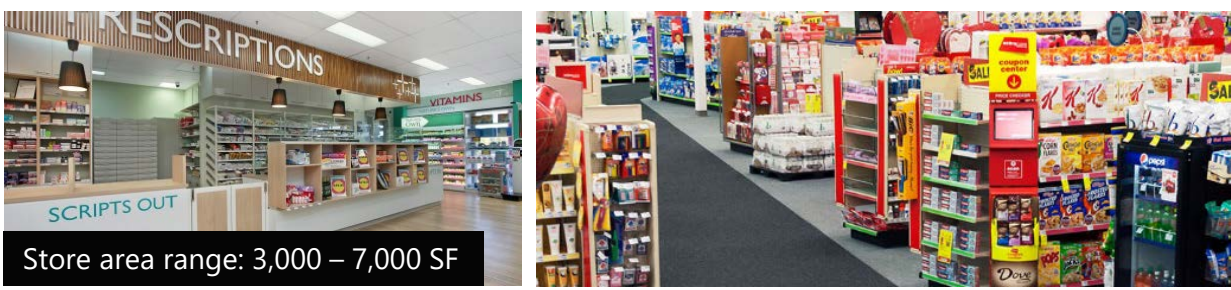
Grocery Store (Urban Format)



Store area range: 5,000 – 15,000 SF

VISITORS EMPLOYEES RESIDENTS STUDENTS

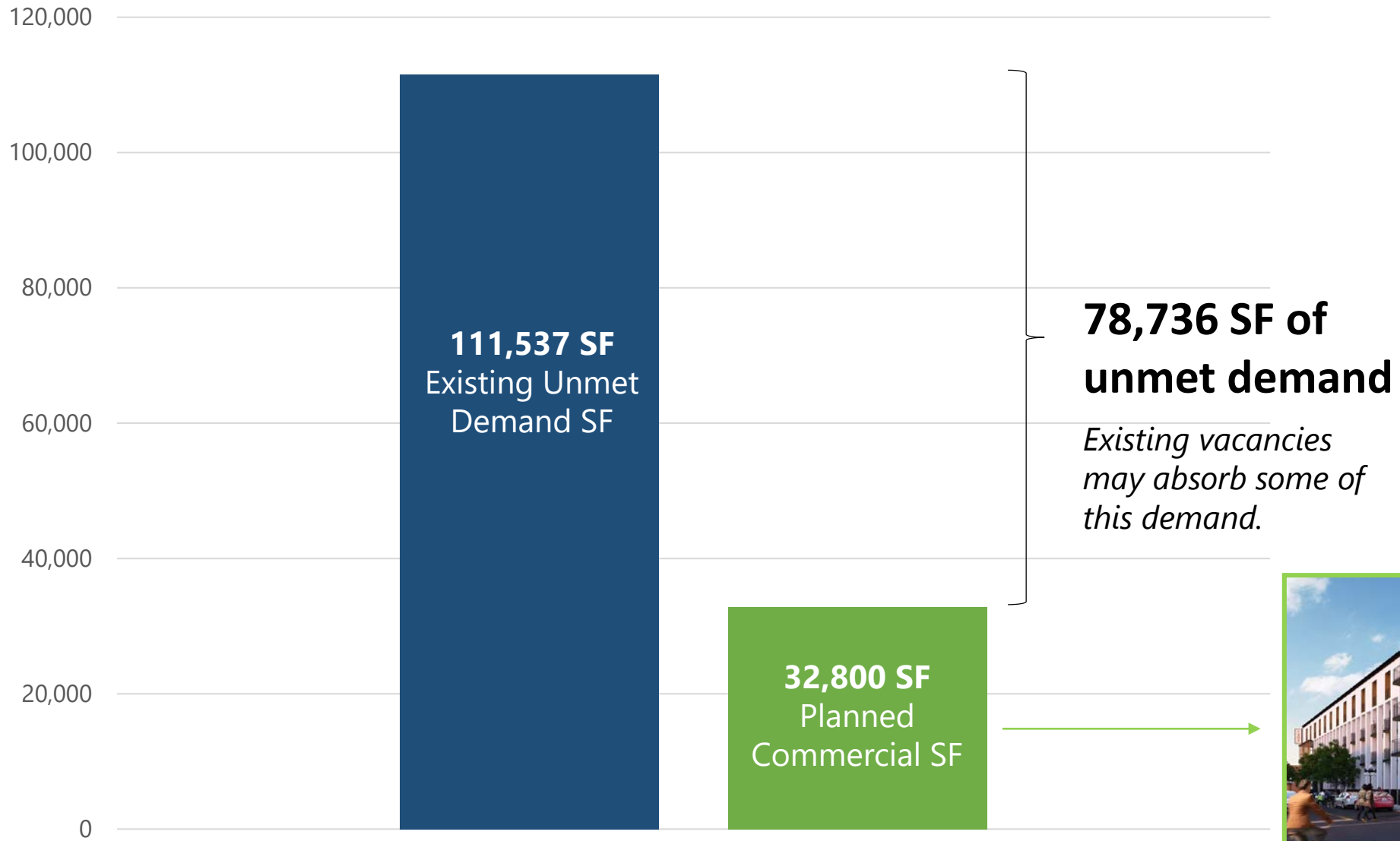
Convenience / Drug Stores (Urban Format)



Store area range: 3,000 – 7,000 SF

VISITORS EMPLOYEES STUDENTS RESIDENTS

YBOR CITY – EXISTING RETAIL DEMAND



78,736 SF of unmet demand

Existing vacancies may absorb some of this demand.



Example: Restaurant in new boutique hotel

* Demand does not include future population, employment and tourism growth in the area.