



Downtown
Fort Worth, Inc.

**Residential Survey
Downtown Fort Worth
July 2008**

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Director of Research**

Background

In July 2008, Downtown Fort Worth, Inc. undertook a survey of downtown residents to better understand and better serve these urban pioneers in the Central Business District. The survey was distributed by mail to each household in the downtown (zip code 76102); it was addressed to the head of household.

The residential survey shines a light on the previously unknown demographic makeup of downtown's residential community, along with data about the employment, neighborhood perceptions and retail preferences of residents. DFWI believes this research will prove interesting to potential residents and useful to home builders, retailers, lenders and policymakers as each makes decisions on investing in Downtown.

Under a contract with the City, DFWI manages Fort Worth Public Improvement District # 1, which provides enhanced services within downtown, including maintenance and landscaping, promotions and marketing, security, and transportation and planning. These services create the "clean and safe" feel of downtown which is attractive to visitors, residents and employees. Through implementation of the Downtown Strategic Action Plan, DFWI champions the provision of a variety of housing options to a cross-section of Fort Worth's population, along with retail that is supportive of downtown residents. The residential survey supports DFWI's efforts to improve our downtown for all stakeholders.

Survey Methodology

Date survey was conducted: July – August 2008

Delivery method: Mail

Number of valid households: 2,690

Number of surveys sent: 1,740

Number of valid addresses: 1,403

Number of valid responses: 313

Response rate: 22.3%

Margin of error at 95% confidence level: $\pm 5\%$

Software used for analysis: SPSS

Survey Sponsors

Downtown Fort Worth Inc.

Function: Survey design
Management of data collection and entry
Statistical analysis



The University of Texas at Arlington

School of Urban and Public Affairs
City and Regional Planning, CIRP 5333
Graduate students
Function: Survey design, mailing and data entry

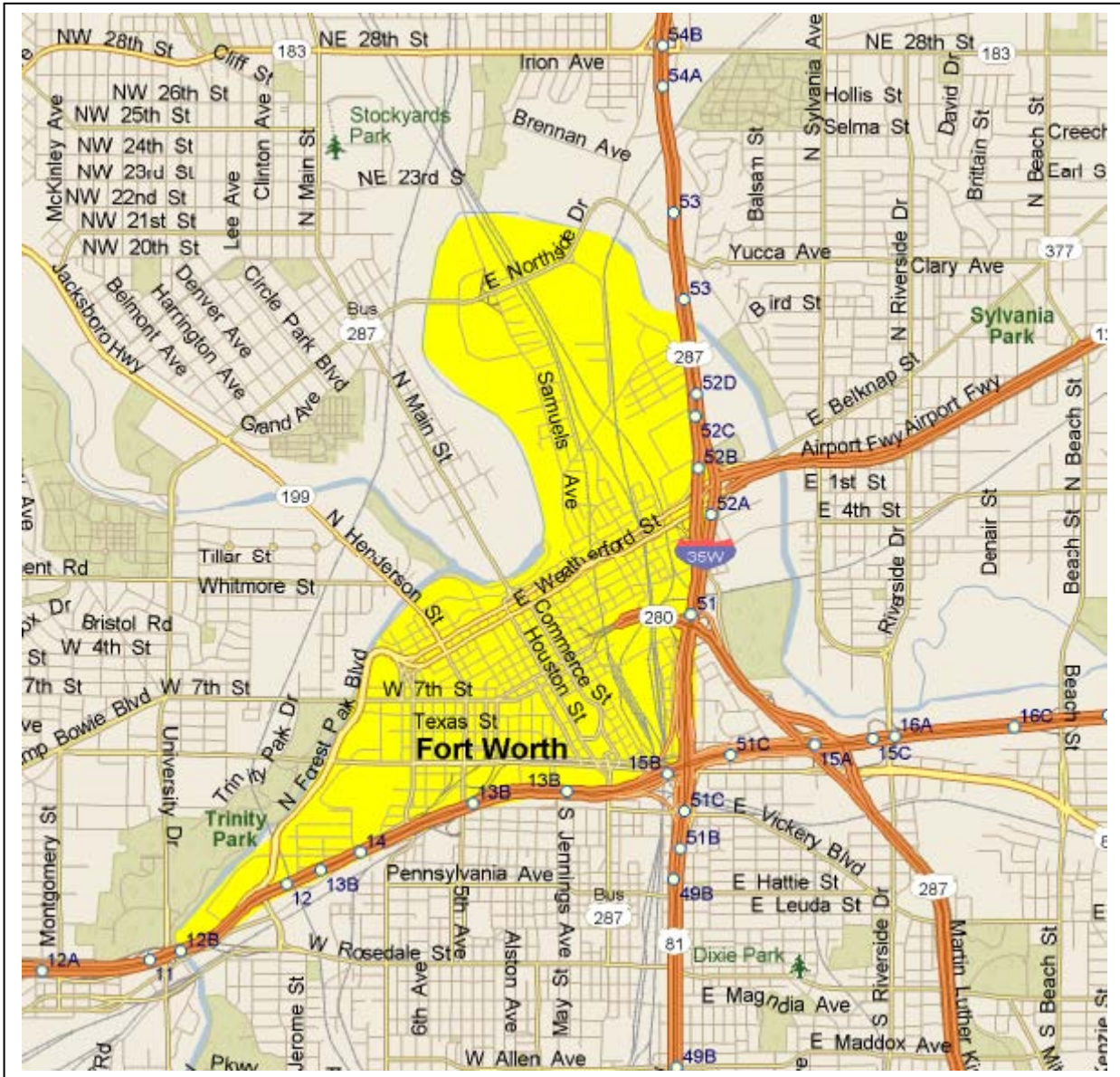


Fort Worth Transportation Authority

Function: Survey design and postage

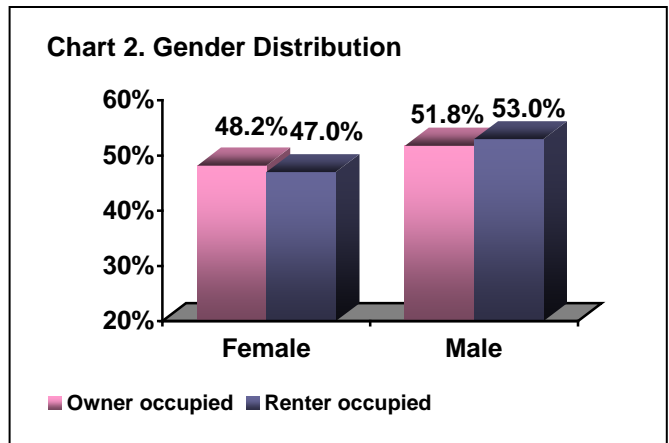
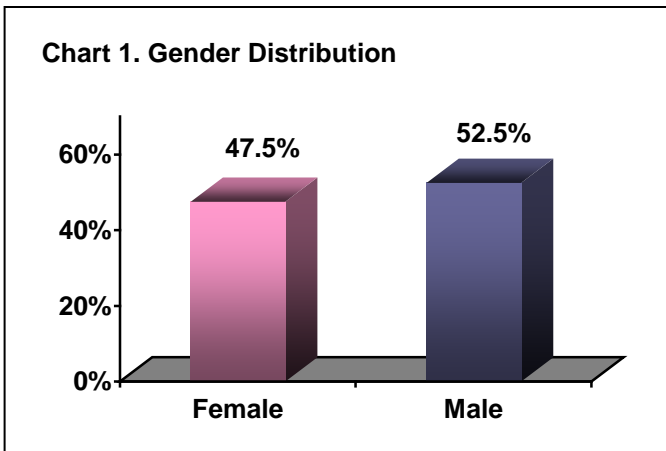


Survey Area Map

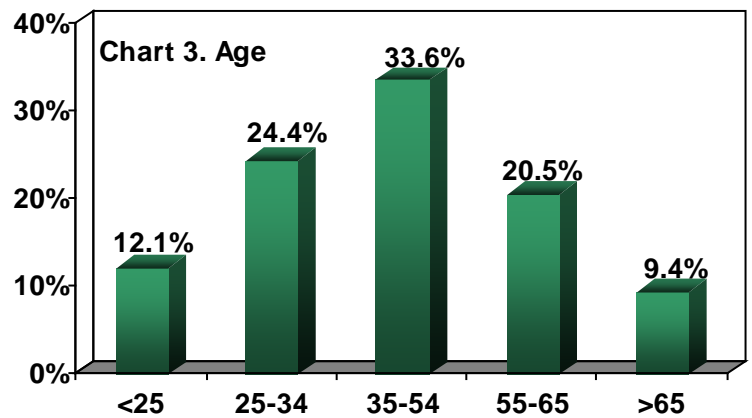


Gender and age

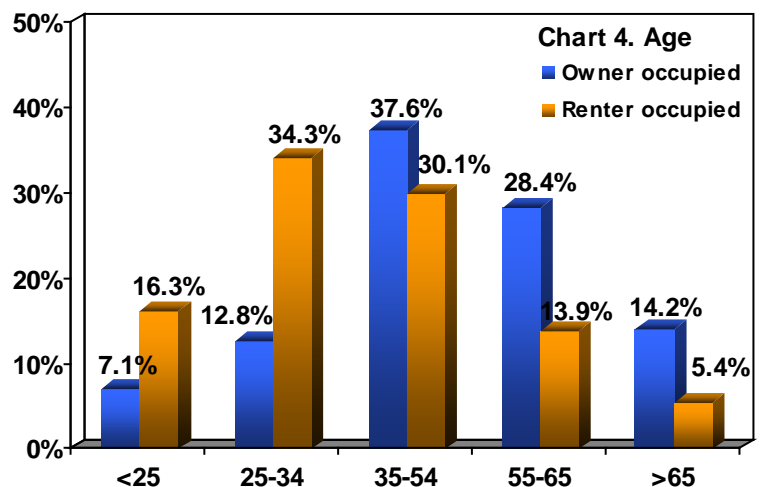
The number of downtown households headed by men is 5% higher than the number headed by women: 52.5% vs. 47.5% (Chart 1). No significant gender gap was observed among owner occupied households.



Residents 35-54 years old represent the largest head of household age group in downtown (Chart 3), and the second largest group is 25-34 years old. More households are headed by people under 25 than over 65, 12.1% vs. 9.4%.



Dominance of the 25-54 group was especially pronounced among renters, at 64.4% of all renting households, and less so among owners, at 50.4% (Chart 4). 16.3% of renters are under the age of 25, while 7.1% of owners are in this age group. In comparison, 39.5% of the city's residents are under 25 and 8.5% are over 65. It's clear that residents in downtown tend to be older than the overall city average, and owners are older than renters.

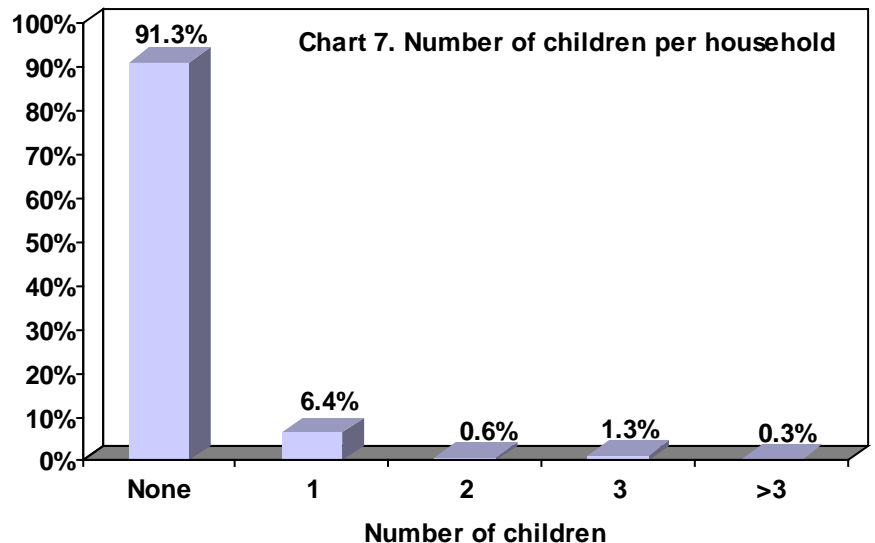
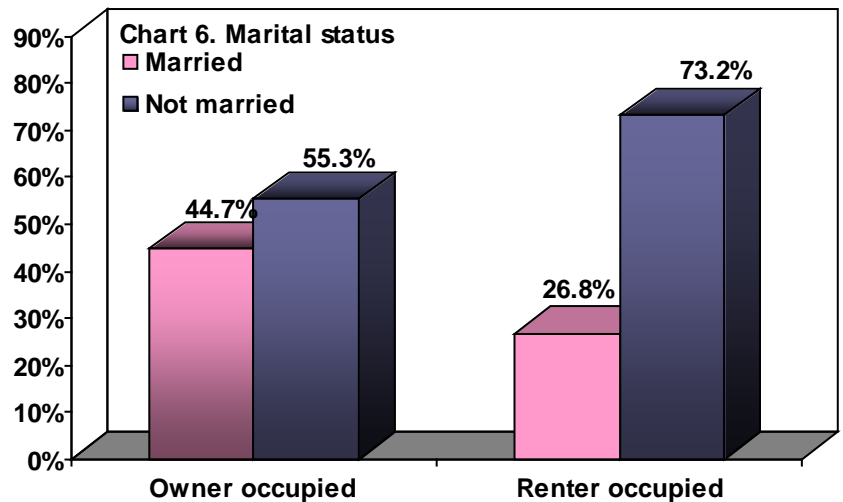
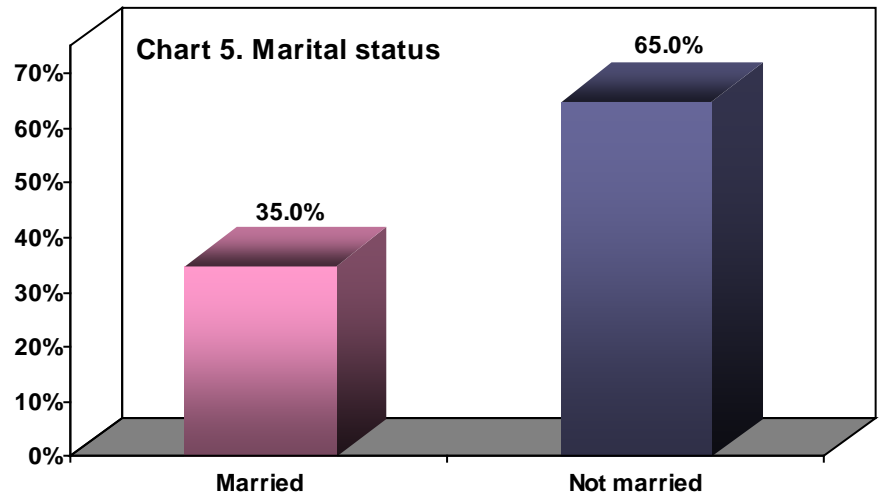


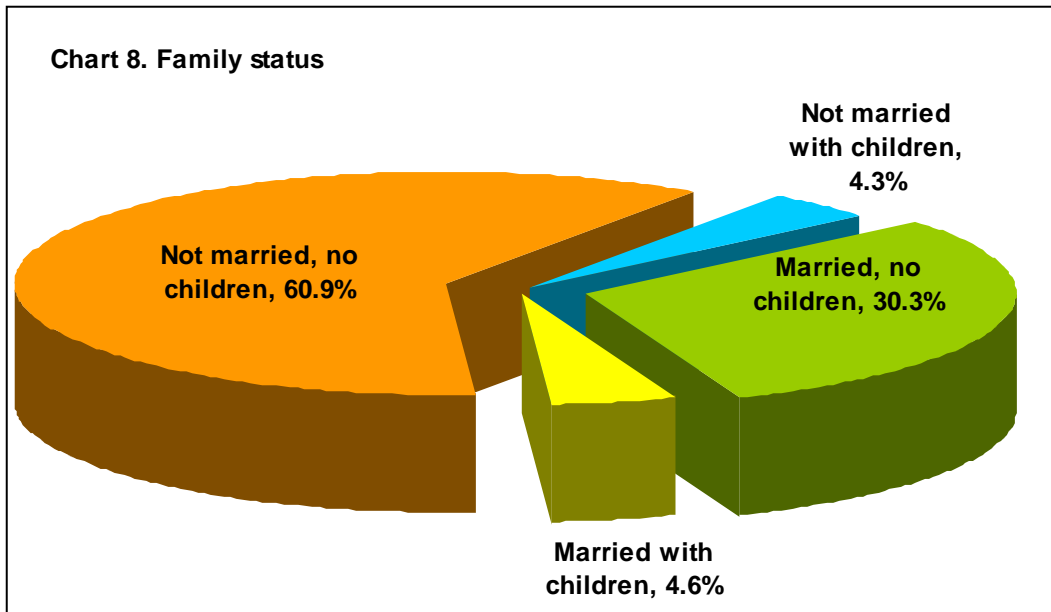
Marital status

Downtown has a higher percentage of unmarried residents than the city of Fort Worth. The majority (65%) of downtown heads of household are not married (chart 5) while 54% of households in the city of Fort Worth are headed by unmarried individuals.

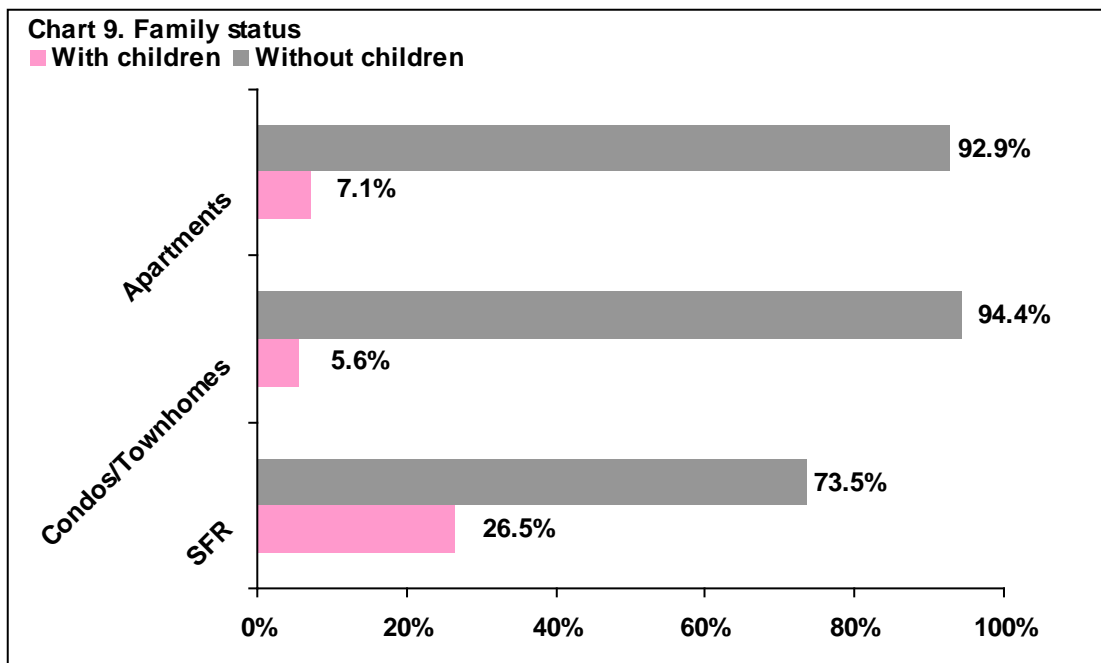
Married couples make up 44.7% of households in downtown owner occupied units, compared to 26.8% of rental units (Chart 6). A substantial majority of renter occupied households in downtown are headed by unmarried individuals (73.2%). Unmarried individuals make up 55.3% of owner occupied households in downtown (Chart 6).

An overwhelming majority of households (91.3%) have no children (Chart 7). 60.9% of households are headed by unmarried, childless individuals (Chart 8); 30.3% of married couples are without children in the residence; 4.7% are married with children; and 4.3% are not married with children.



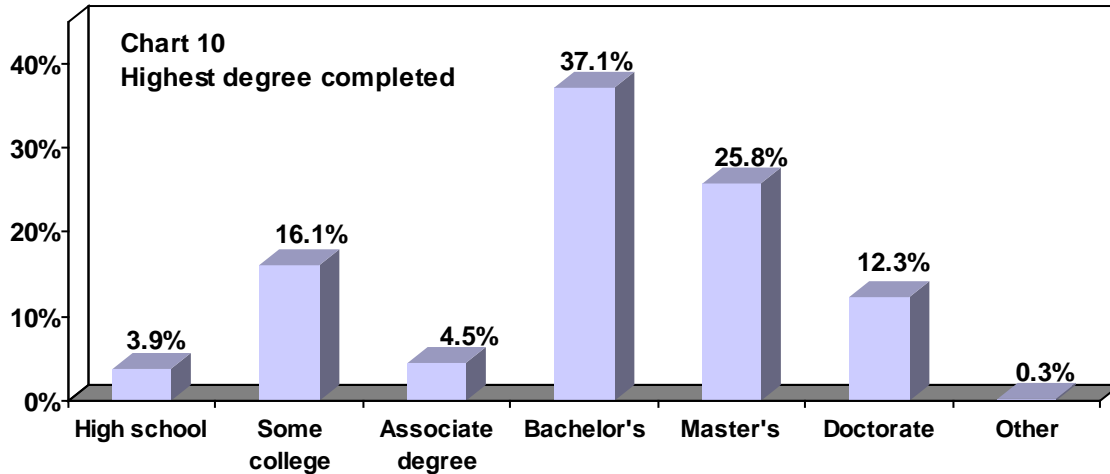


Single family residences have the highest percentage of households with children, 26.5% (Chart 9). Households with children among condos/townhomes and apartments were significantly lower than single family residence (5.6% and 7.1% respectively).

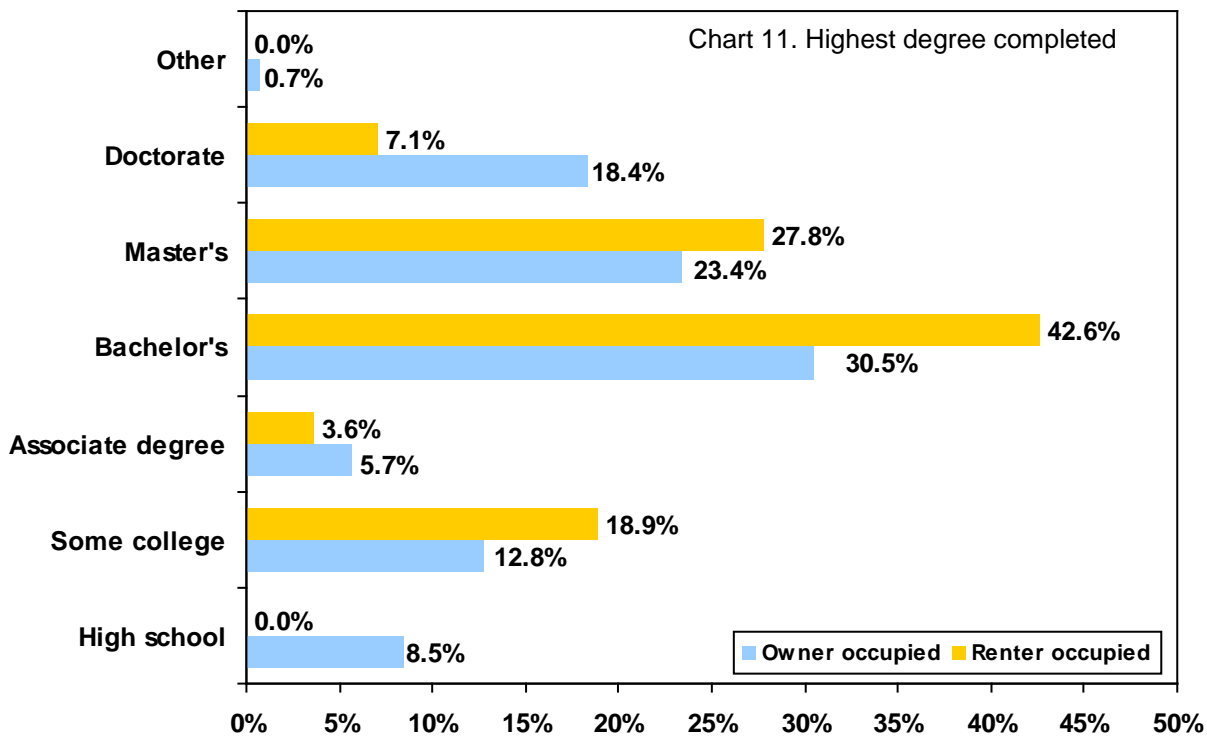


Educational attainment

75.2% of downtown heads of household have a bachelor's degree or higher, compared to 25% in the city of Fort Worth. Holding a bachelor's degree were 37.1% of downtown heads of household vs. Fort Worth at 17.1% and Texas at 17% (Chart 10). Holding a Master's degree were 25.8% of downtown heads of household vs. Fort Worth at 5.8% and Texas at 5.7%. Holding a doctoral degree were 12.3% of heads of household vs. Fort Worth at 0.8% and Texas at 0.9%.



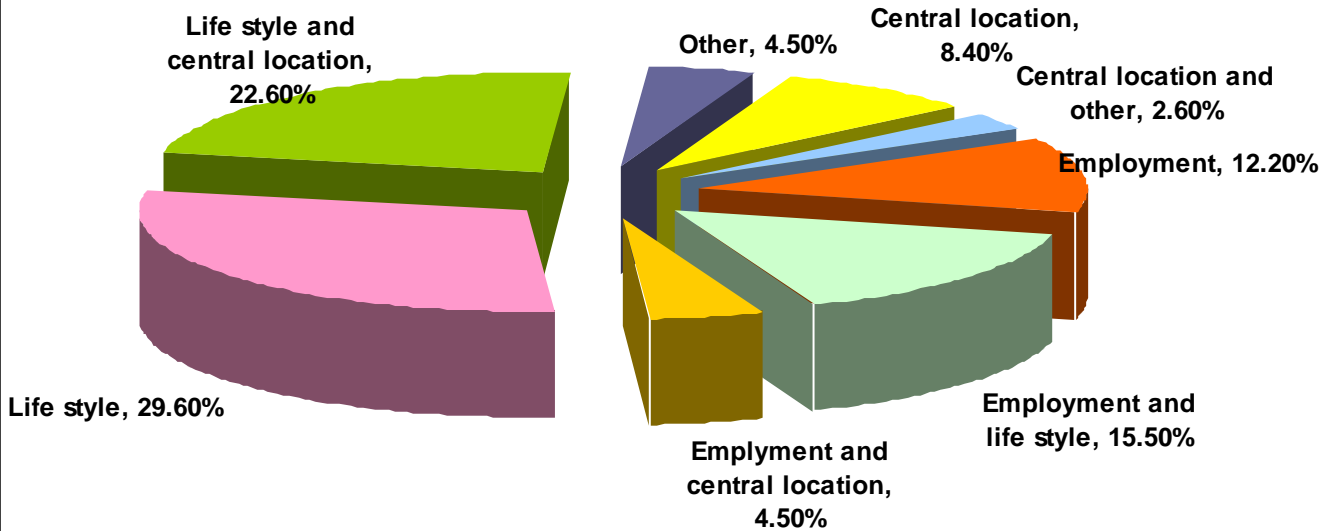
42.6% of downtown renters and 30.5% of owners reported bachelor's degree as highest attained. 27.8% of renters and 23.4% of owners reported master's degree as highest attained. 7.1% of renters and 18.4% of owners reported doctorate degree as highest attained (Chart 11). Nationally, 17.2% have bachelors, 6.9% masters and 1.1% doctorate degrees.



Reasons for living downtown

Life style was cited as a primary reason for living downtown by 29.6% of residents (chart 12). Life style in combination with central location was cited by 22.6% of residents for deciding to live downtown. Overall, 67.7% of residents said that life style played a role in deciding to live downtown.

Chart 12. Primary reason for living downtown



Transportation

A majority (80.6%) of downtown residents use a private car as the primary means of transportation to work (chart 13). 15.2% walk to work and 3.6% use public transportation (1.8% bus, 1.8% train).

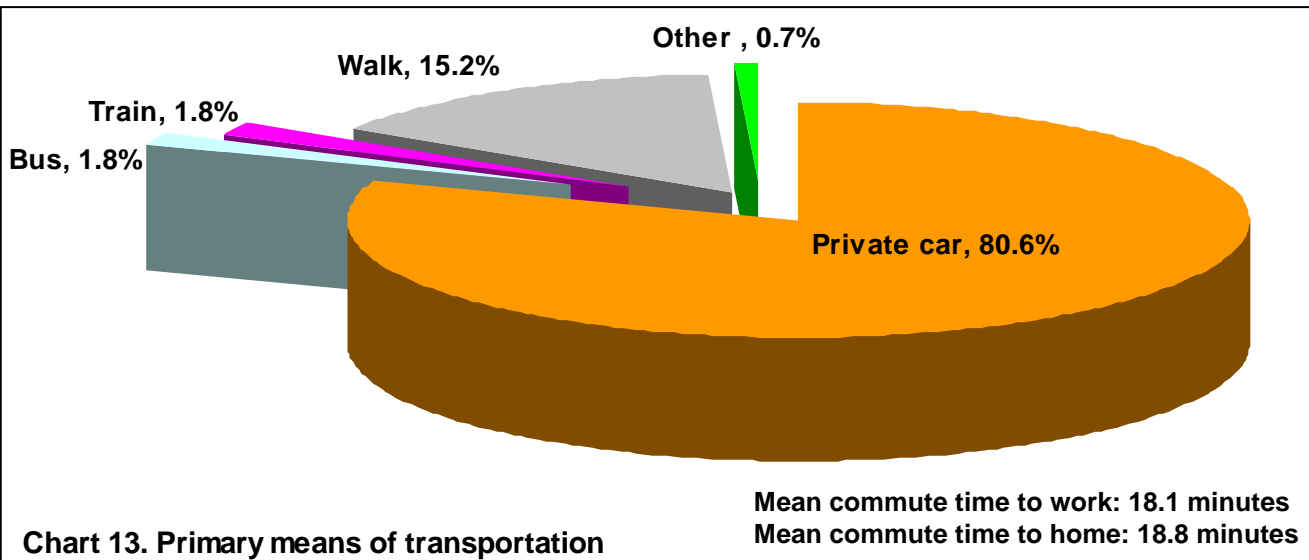
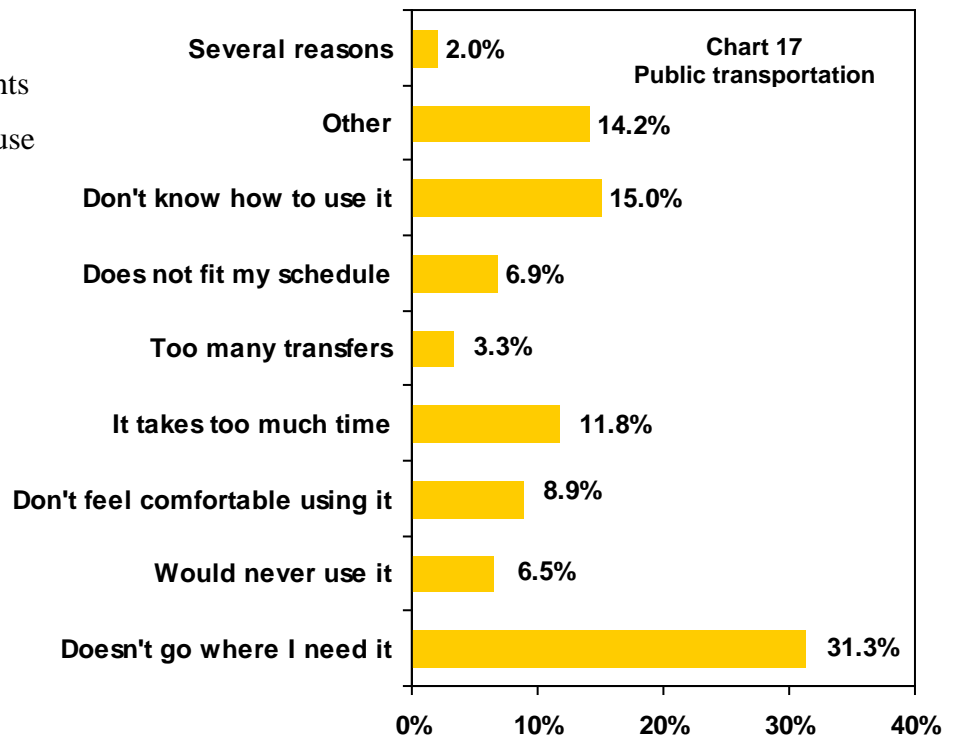
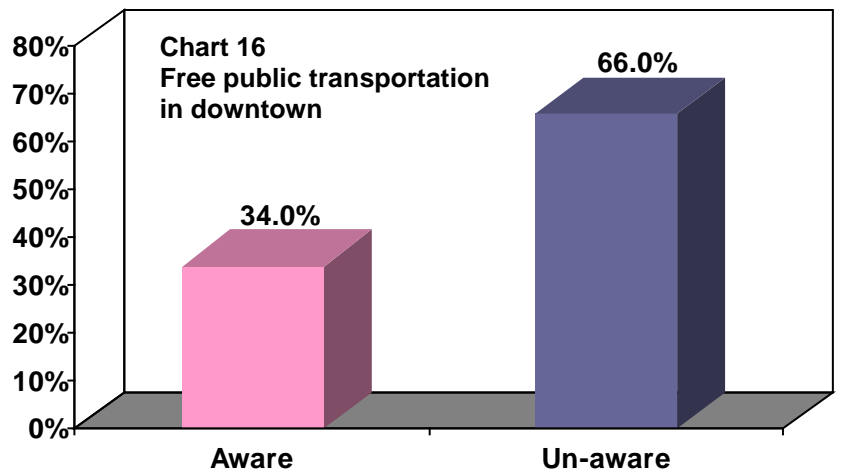
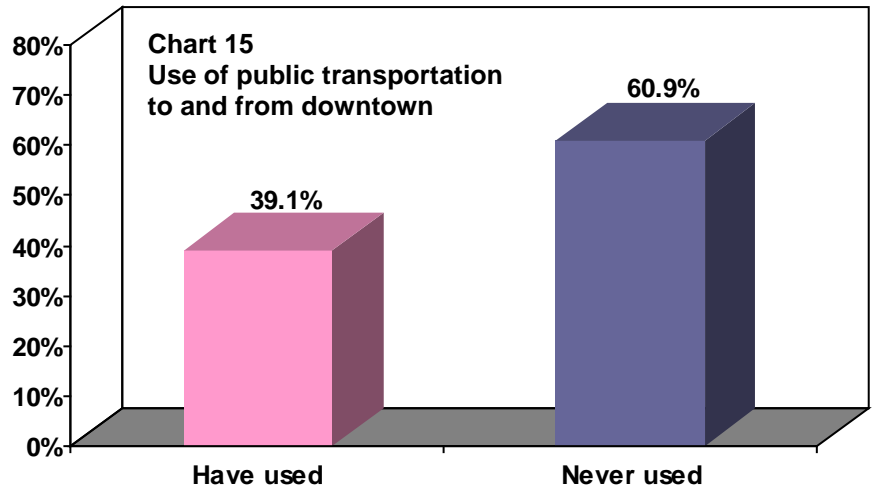


Chart 13. Primary means of transportation

The mean travel time to work is 18.1 minutes and mean travel time to home is 18.8 minutes.

60.9% of downtown residents have never used public transportation to and from downtown Fort Worth (chart 15). 66% of the residents are unaware of free bus service in downtown (chart 16).

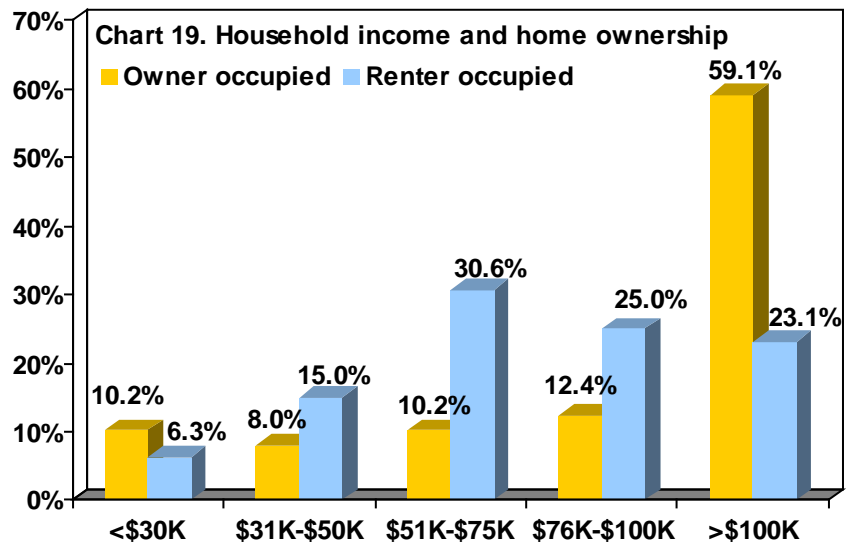
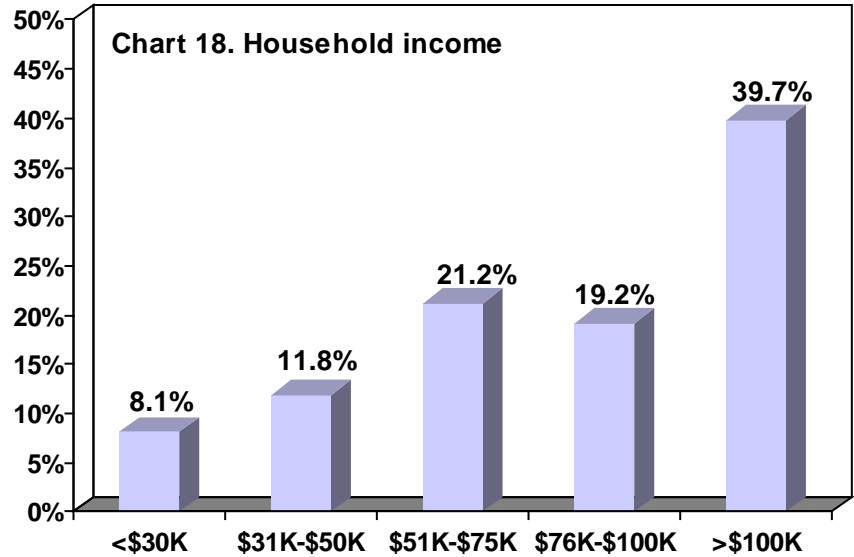
Residents were asked to offer the primary reason as to why they do not use public transportation to and from downtown Fort Worth (chart 17). 15.4% provided negative opinions of public transportation (would never use it and don't feel comfortable using it). 53.3% cited scheduling and routing conflicts as the primary reason for not using public transportation (doesn't go where I need it, it takes too much time and too many transfers). 15% of residents said that they do not know how to use the public transportation.



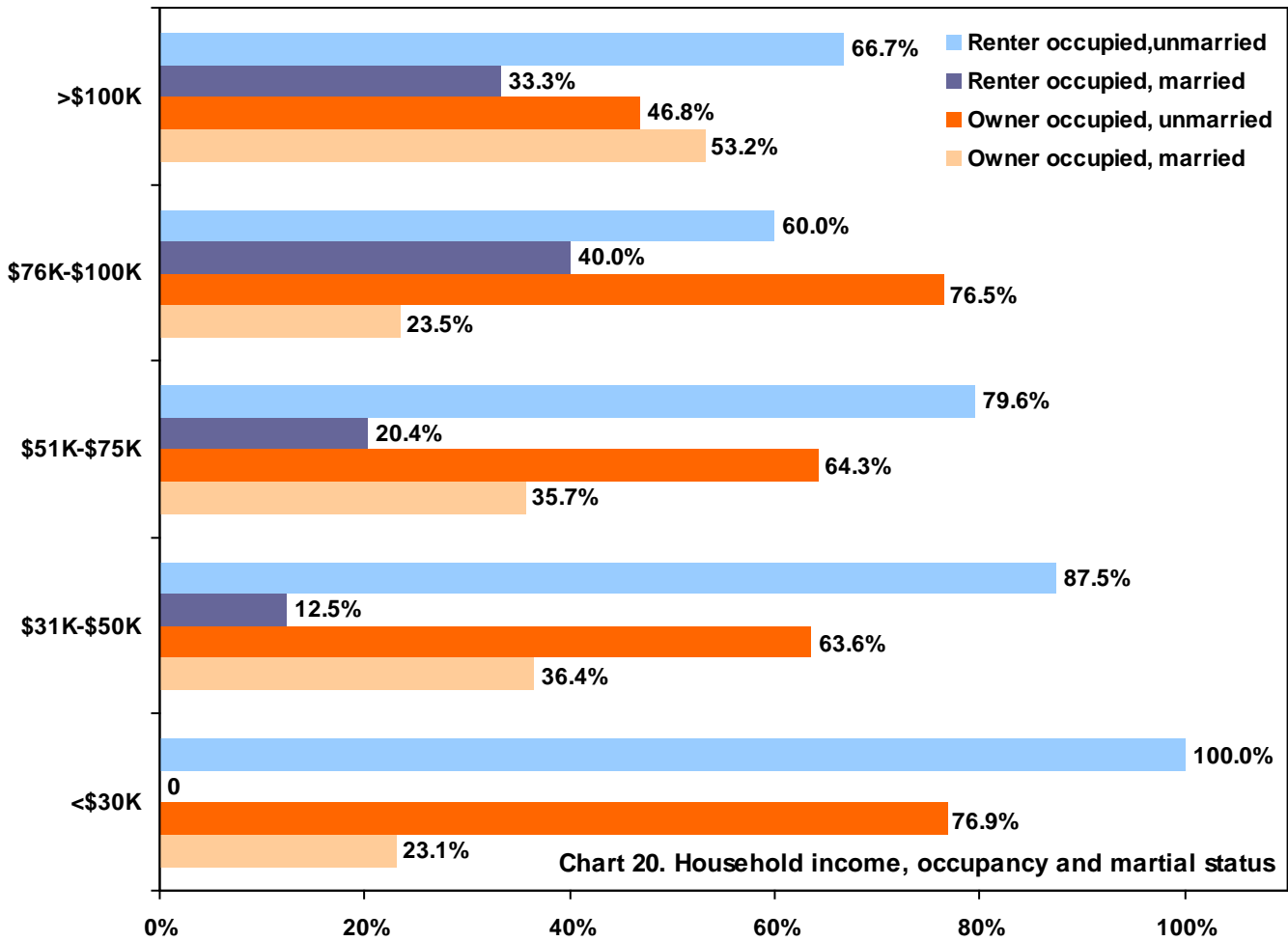
Income

More than 39% of downtown households have incomes exceeding \$100,000 (Chart 18). 12.6% of households in city of Fort Worth and 13.6% in the city of Dallas have household income that exceeds \$100,000. City of Fort Worth median household income is \$47,104; more than 80% of downtown residents have household income equal to or greater than \$51,000.

Income disparity among owners and renters is pronounced (Chart 19). While 59.1% of owner occupied properties reported household income exceeding \$100,000, only 23.1% of renter occupied units reported similar income. 45.6% of renters and 18.2% of owners reported household income between \$31,000-\$75,000. Nevertheless, most renting households (78.7%) reported income equal to or greater than \$51,000, higher than the Fort Worth median.

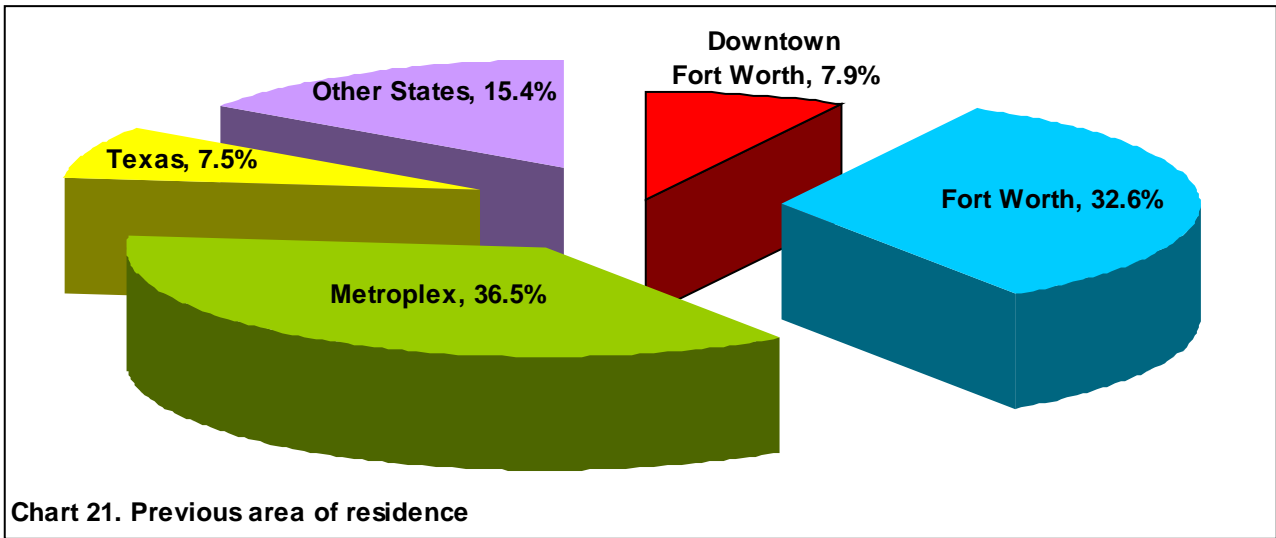


All renter occupied units with household income less than \$30,000 are occupied by unmarried persons. Unmarried renters and owners make up a higher percentage of each income bracket except the highest (> \$100,000). 53.2% of owner occupied and 33.3% of renter occupied households with income exceeding \$100,000 are occupied by married couples (Chart 20).

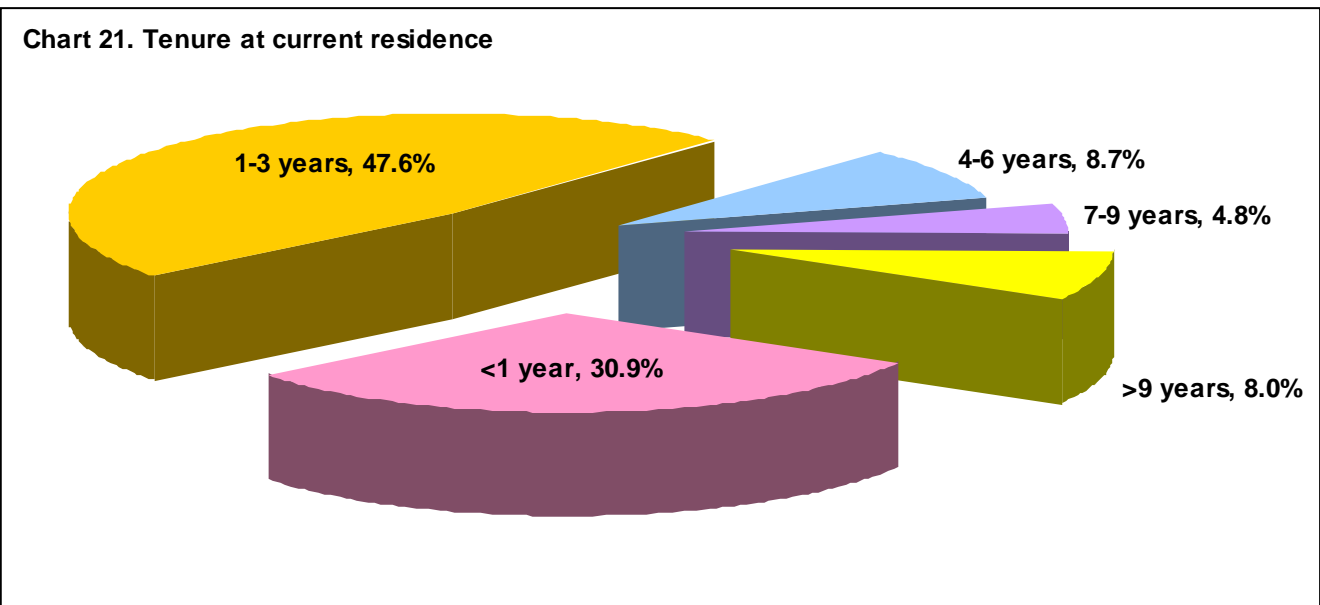


Previous place of residence and length of tenure

The majority of residents moved to downtown from a location in the Dallas Fort Worth metropolitan area, 32.6% from the city of Fort Worth and 36.5% from cities in the Metroplex other than Fort Worth. 7.5% come from other cities in Texas and 15.4% from out of state. 7.9% reported downtown Fort Worth as their previous place of residence (Chart 21).

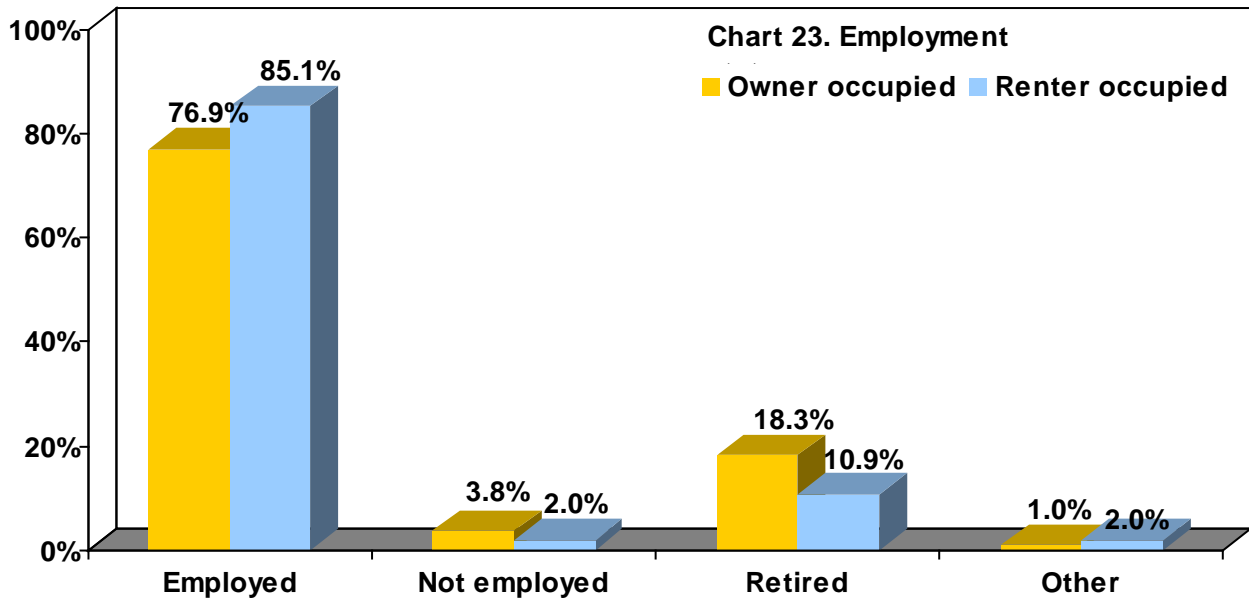
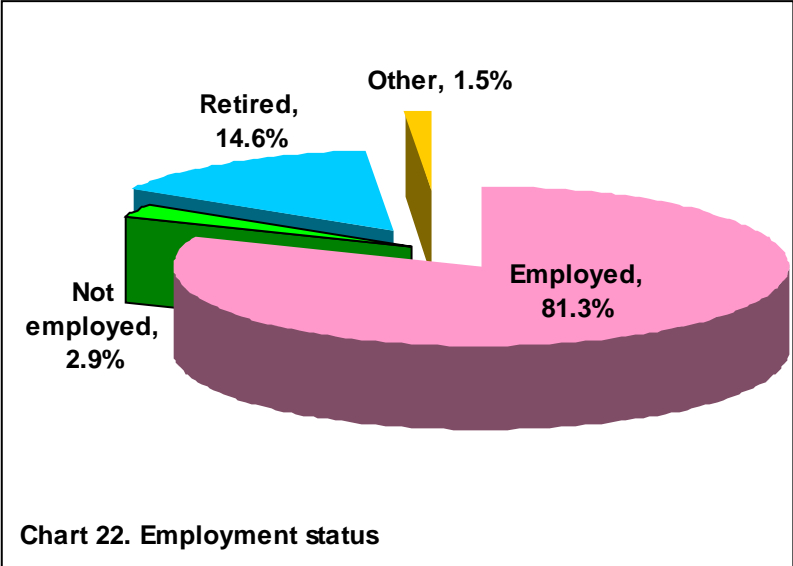


The length of tenure of 78.5% of downtown residents is less than 3 years (Chart 21).

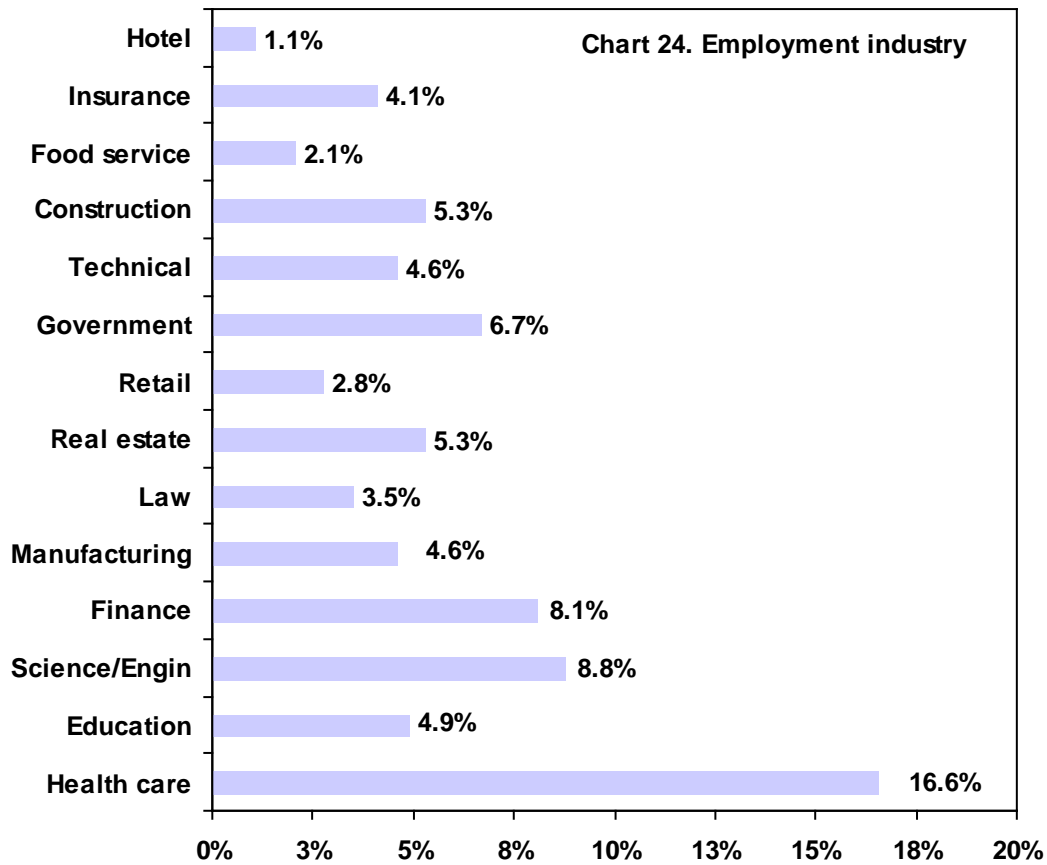


Employment

81.3% of downtown residents are employed, 14.6% are retired and 2.9% are not employed. Students make up the majority of unemployed persons (Chart 22). A higher percentage of renters are employed than owners (85.1% and 76.9% respectively). A much higher percentage of homeowners than renters is retired, 18.3% vs. 10.9% (Chart 23).

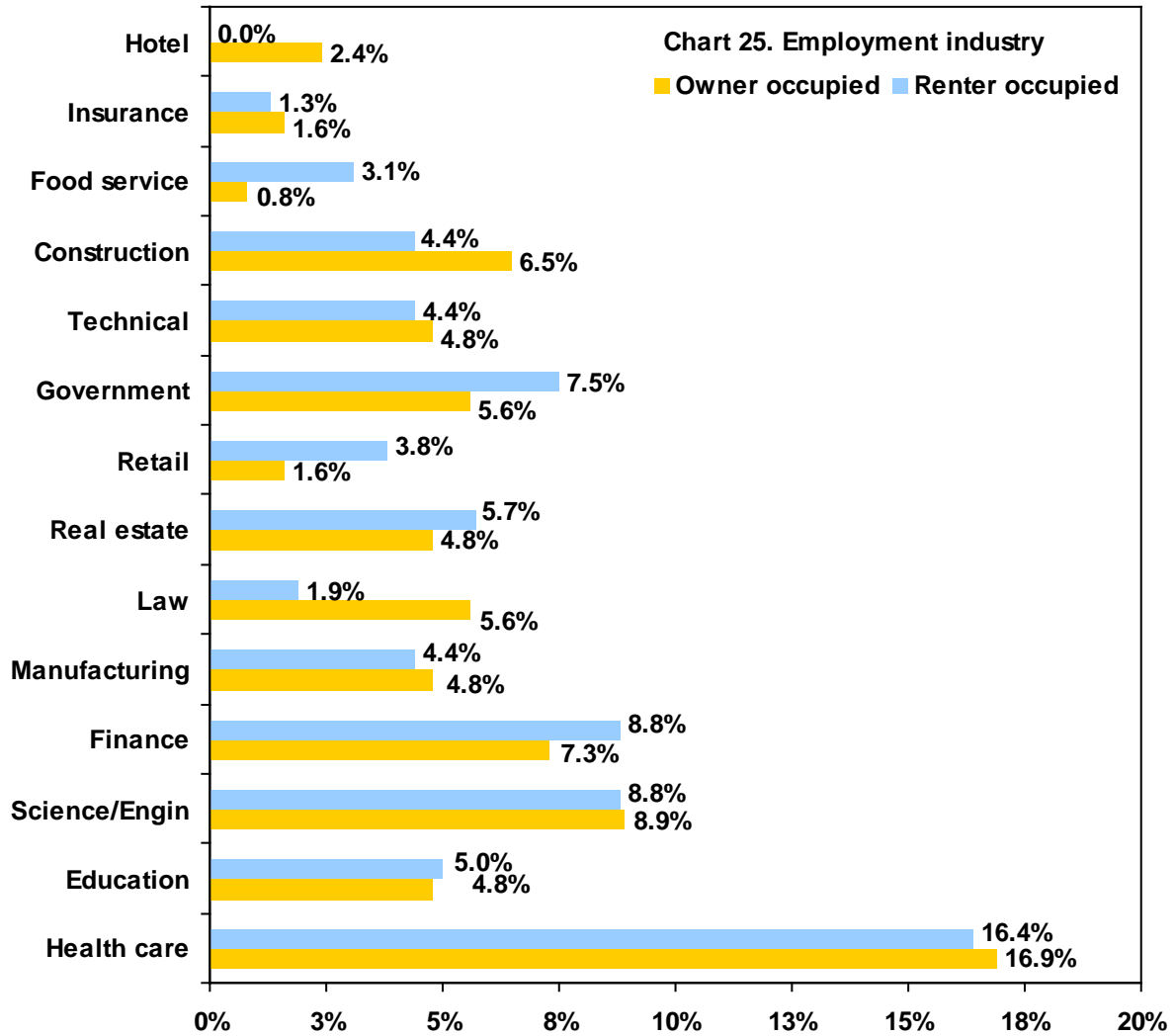


A large percentage of downtown residents (16.6%) work in the health care industry. 8.8% are employed in science and engineering and 8.1% in finance. Other industries are listed in Chart 24.



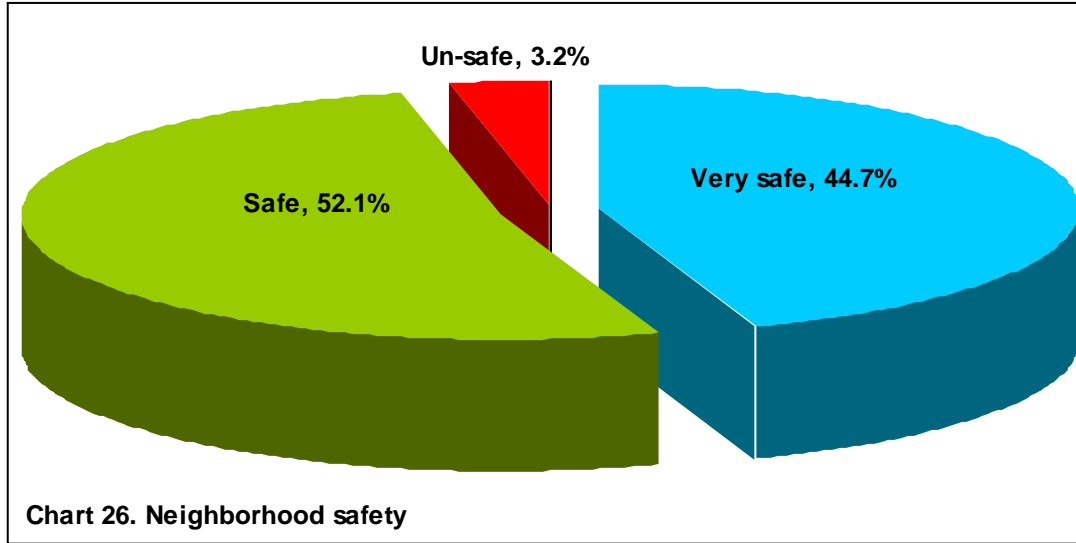
A large portion of home owners (16.9%) and renters (16.4%) is employed in the health care industry (Chart 25). A higher proportion of home owners than renters are employed in law, construction, and hotel industries.

A higher proportion of home renters than owners are employed in finance, government, and food services industries.

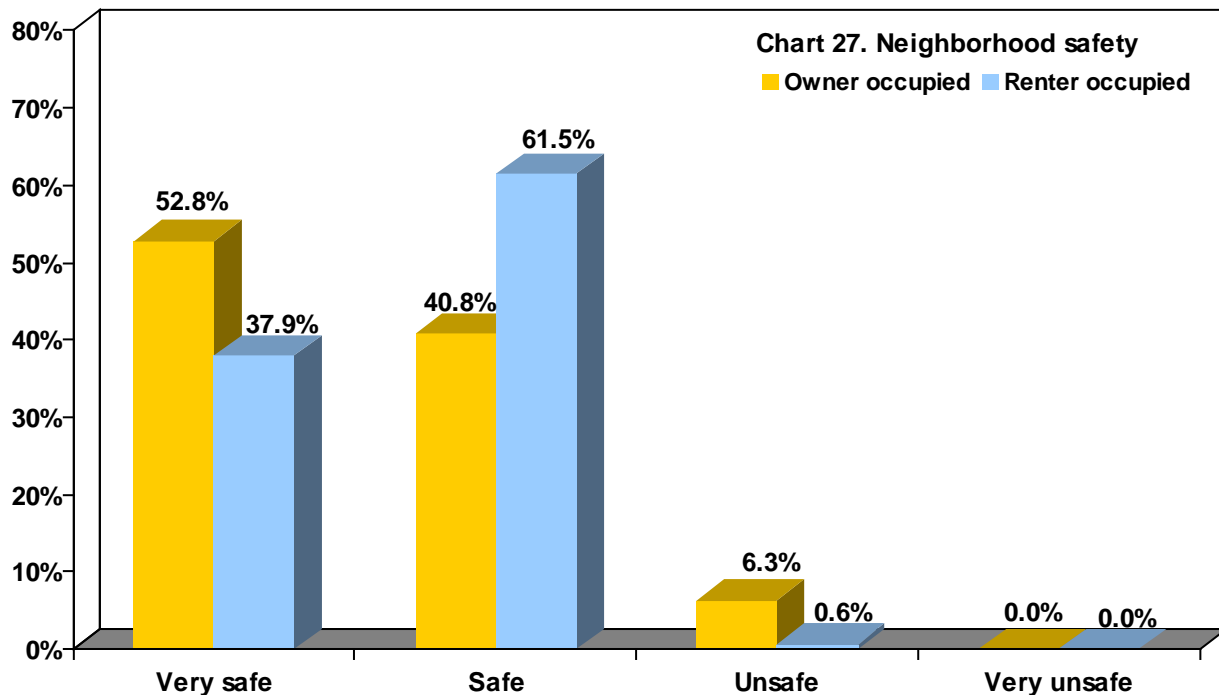


Neighborhood safety

The majority (52.1%) of downtown residents ranked their neighborhoods as safe (Chart 26). 44.7% ranked them very safe and 3.2% ranked them as unsafe.

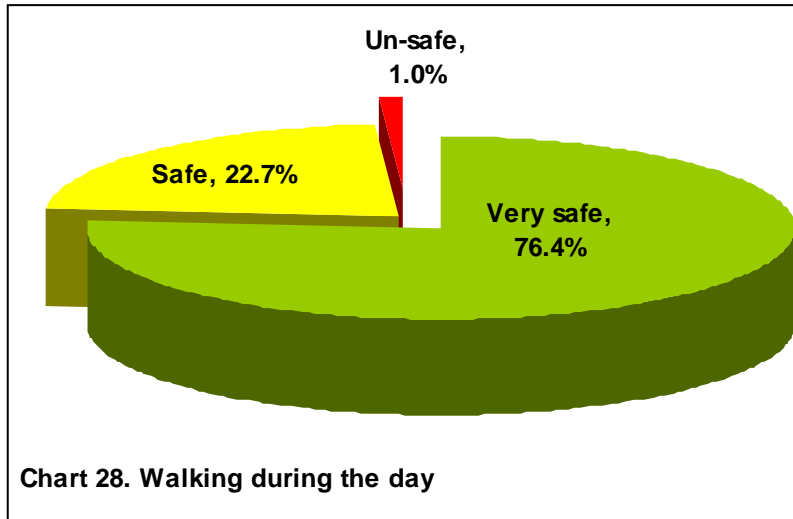


More homeowners than renters believe that their neighborhoods are very safe, 52.8% vs. 37.9%. More renters (61.5%) than owners (40.8%) ranked their neighborhood as safe. 6.3% of owners and 0.6% of renters ranked their neighborhood as unsafe (Chart 27). No homeowner or renter rated their neighborhood as very unsafe.

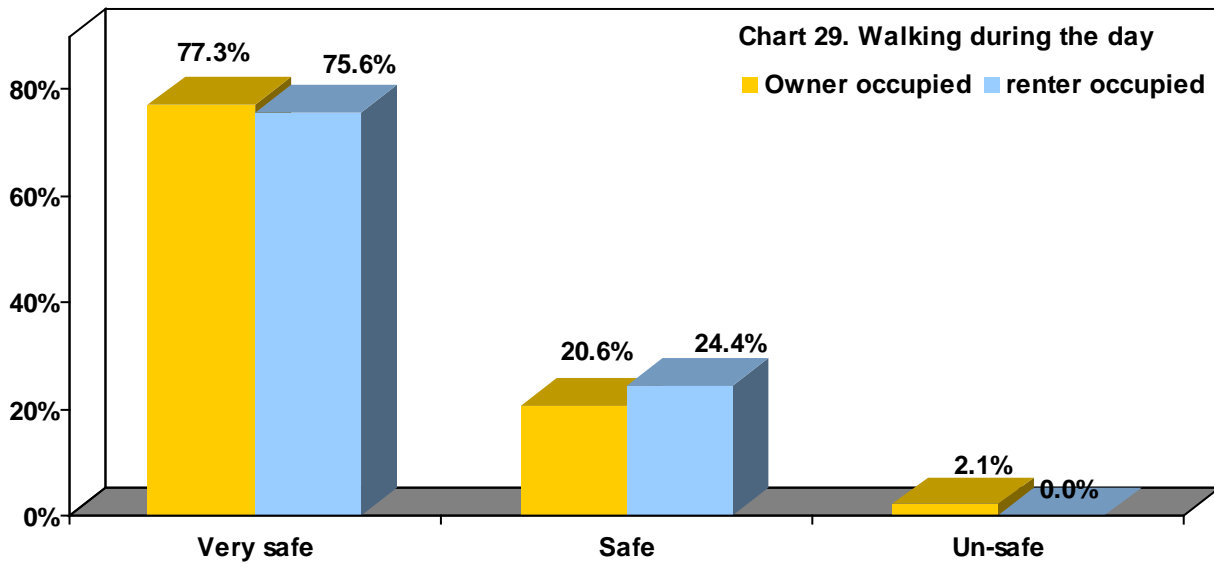


Daytime safety

The majority (76.4%) of residents feels very safe walking during the day in downtown (chart 28). 22.7% feel safe and 1% feels unsafe walking during the day in downtown.

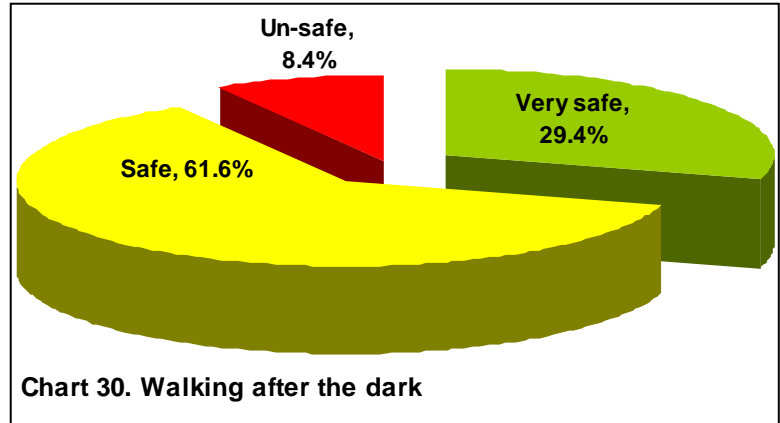


A majority of owners (77.3%) and renters (75.6%) felt very safe walking during the day in downtown. Very few felt unsafe (Chart 29).

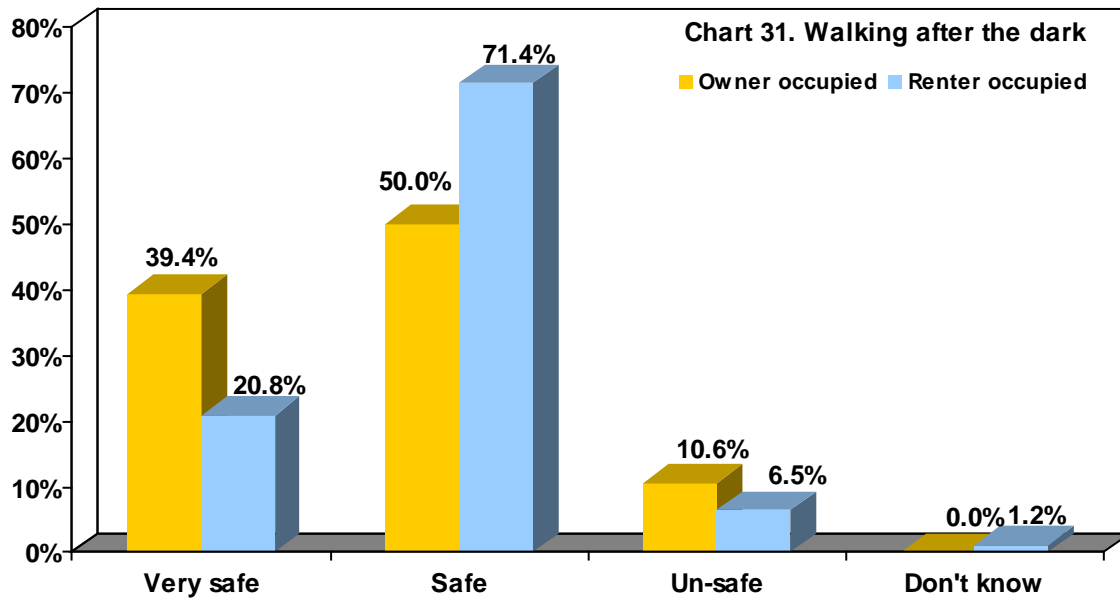


Nighttime safety

The majority (61.6%) of residents feel safe to walk after dark in downtown. 29.4% feel very safe, 8.4% feel unsafe (Chart 30).

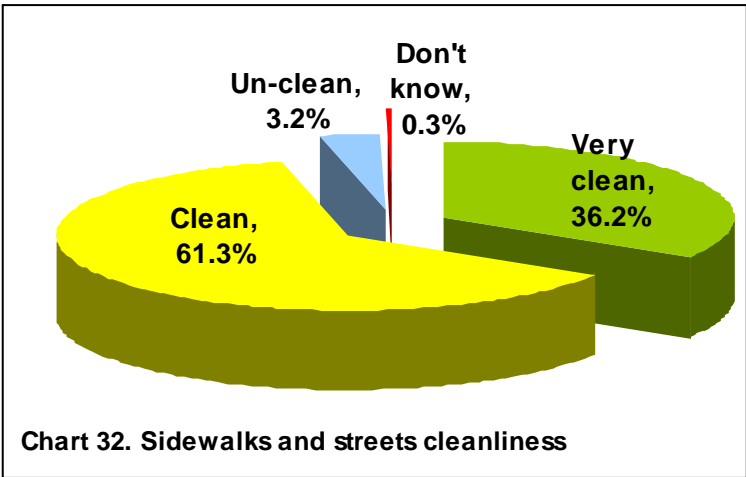


More owners (39.4%) than renters (20%) feel very safe walking after dark in downtown (chart 31). 50% of owners and 71.4% of renters feel safe walking after dark in downtown; very few feel unsafe.

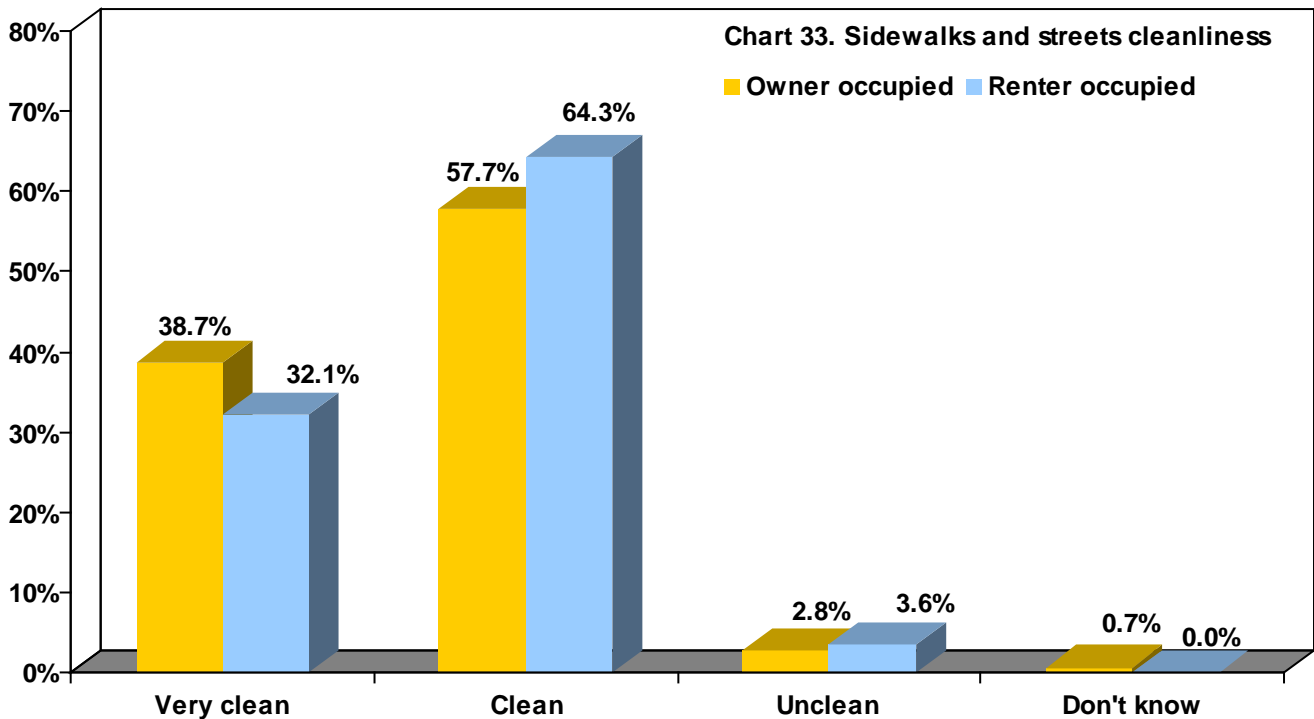


Sidewalk cleanliness

A majority (61.3%) of downtown residents rated the sidewalks and streets clean (Chart 32). 36.2% rated them very clean, 3.2% rated unclean and 0.3% had no opinion. Overall, 97.5% rated them clean or very clean.

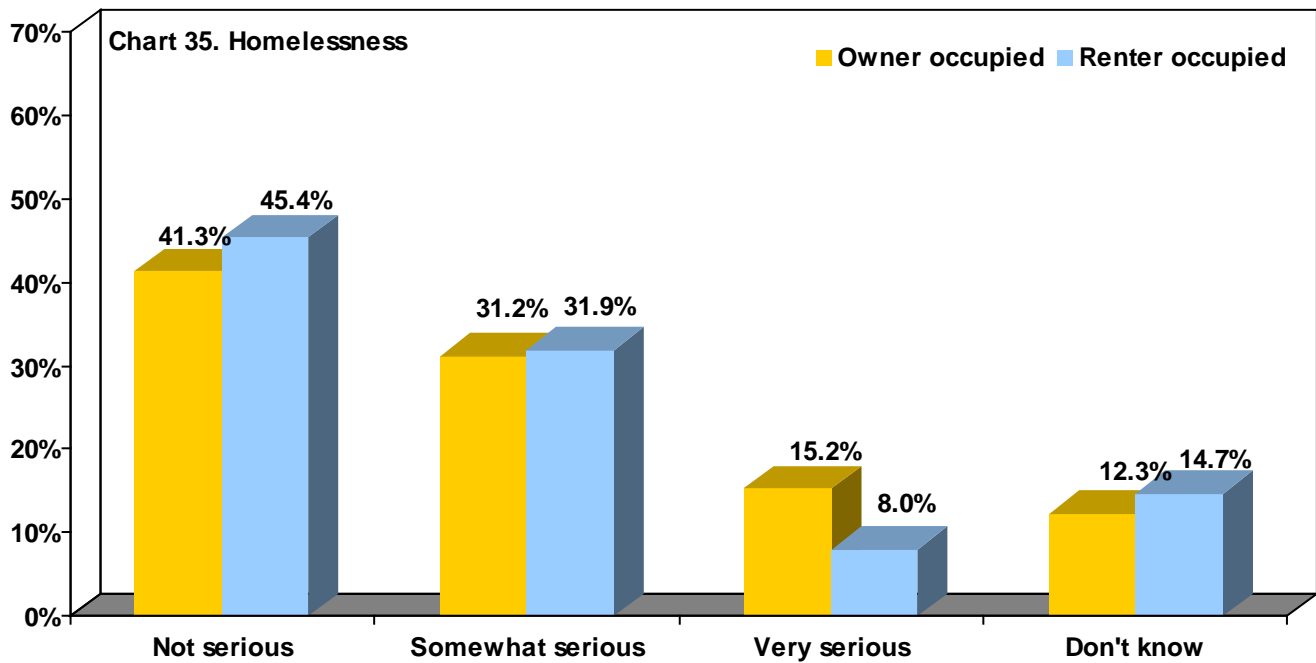
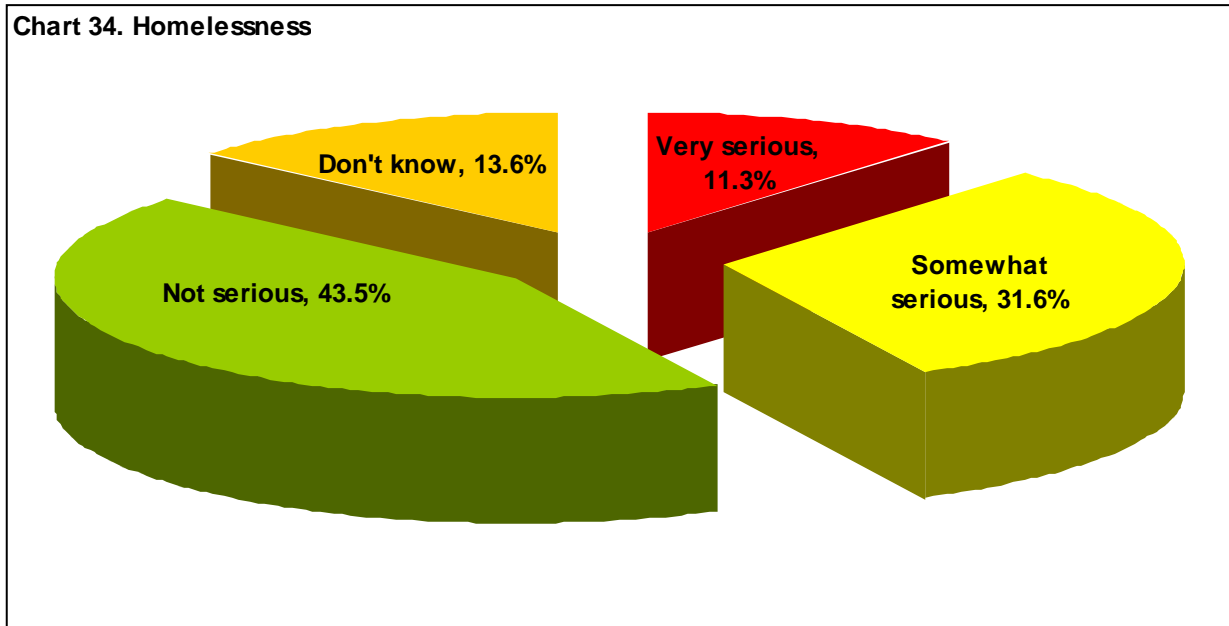


Rating of sidewalks and streets cleanliness was similarly distributed between owner occupied and renter occupied residents of downtown (Chart 33). A small percentage of owner occupied (2.8%) and renter occupied (3.6%) residents rated the sidewalks and streets as unclean.



Homelessness

The homelessness problem in downtown was rated not serious by 43.5% of downtown residents. 31.6% rated it as somewhat serious and 11.3% very serious (Chart 34). The homelessness problem in downtown was rated not serious by more renters than owners (45.4% and 41.3% respectively), chart 38. An equal proportion of renters and owners rated the homelessness in downtown as somewhat serious. A higher percentage of homeowners than renters rated it as very serious (15.2% and 8.0% respectively).



Retail 1- Grocery Stores

Majority of downtown residents (69.2%) rated the desirability of a grocery store as very high and 14.9% rated it as high. 8.5% rated the desirability of grocery stores very low (Chart 36). Residents were invited to write in the name(s) of grocery stores that they would like to have in downtown Fort Worth.

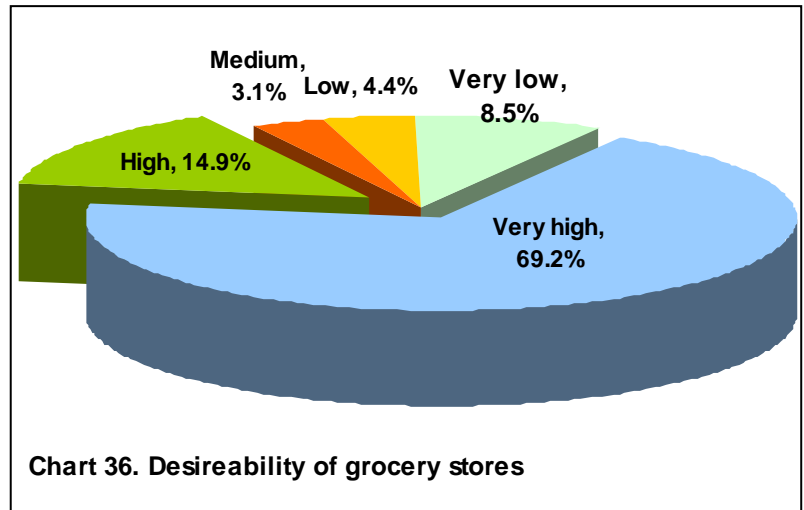
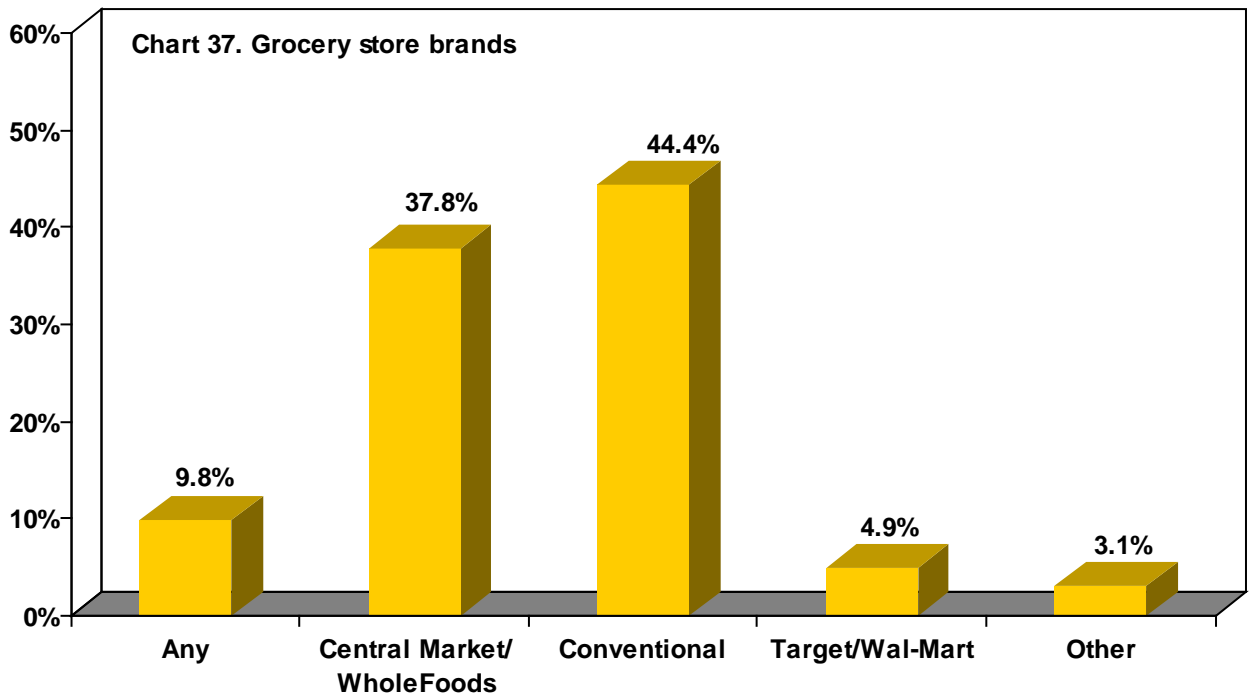


Chart 37 shows number of times grocery store names were written by respondents. Conventional grocery stores were written 44.4%, Central Market/Whole Foods group 37.8% and Target/Wal-Mart group 4.9%.



Grocery stores categories

Central Market/Whole Foods group includes: Central Market, Whole Foods, Sprout, Eatzi's, Farmers Market, Fresh Market, Gourmet Grocery stores

Conventional group includes: Carnival, Fiesta, Kroger, Safeway, Albertsons, Minyard, Tom Thumb, HEB, and Sack and Save

Retail

2- Clothing/Department stores

A majority of downtown residents (54.6%) rated the desirability of clothing/department stores as high or very high and 28.5% rated it as medium. 6% rated the desirability of this type of retail stores as very low (Chart 38). Residents were invited to write in the name(s) of clothing/department stores that they would like to have in downtown Fort Worth.

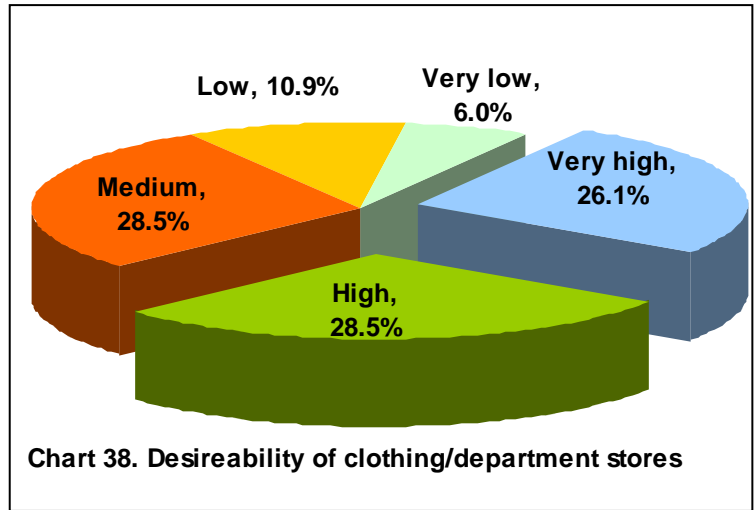
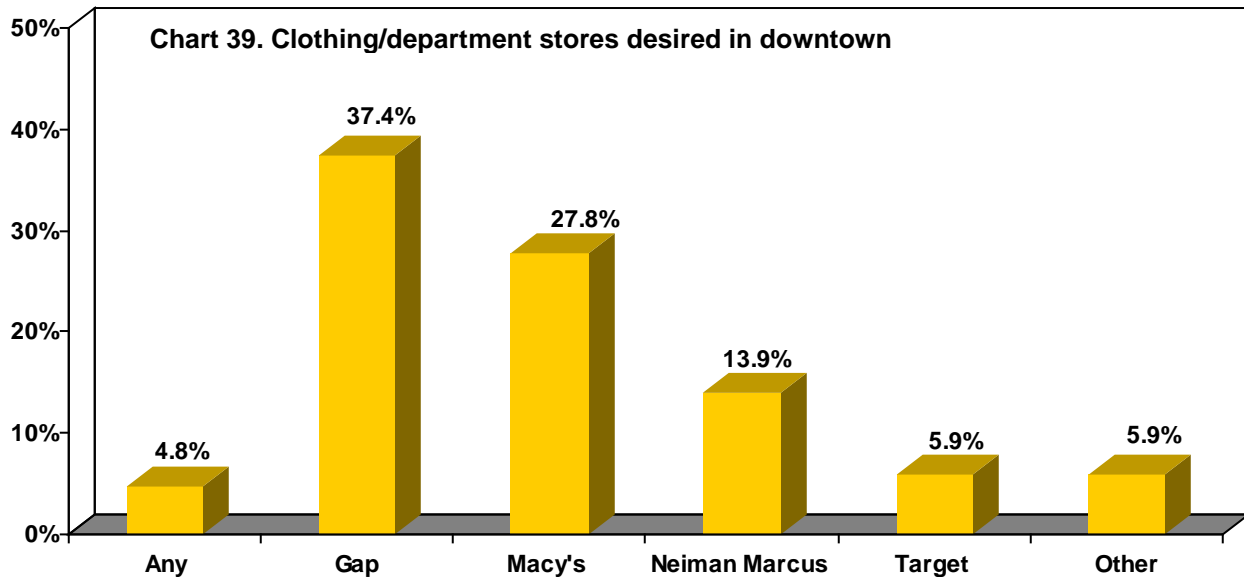


Chart 39 shows number of times clothing/department store names were written by respondents. Gap type of stores was written 37.4% followed by Macy’s type (27.8%), Neiman Marcus (13.9%) and Target (5.9%).



Clothing and department stores categories

Gap: Gap, Old Navy, Banana Republic, Ann Taylor, Eddie Bauer, Express, Forever 21, H&M, Hanger and Loft, JC Crew, Limited, NY & Co, REI, Talbots.

Macy’s: Dillard’s, JC Penny, Macy’s.

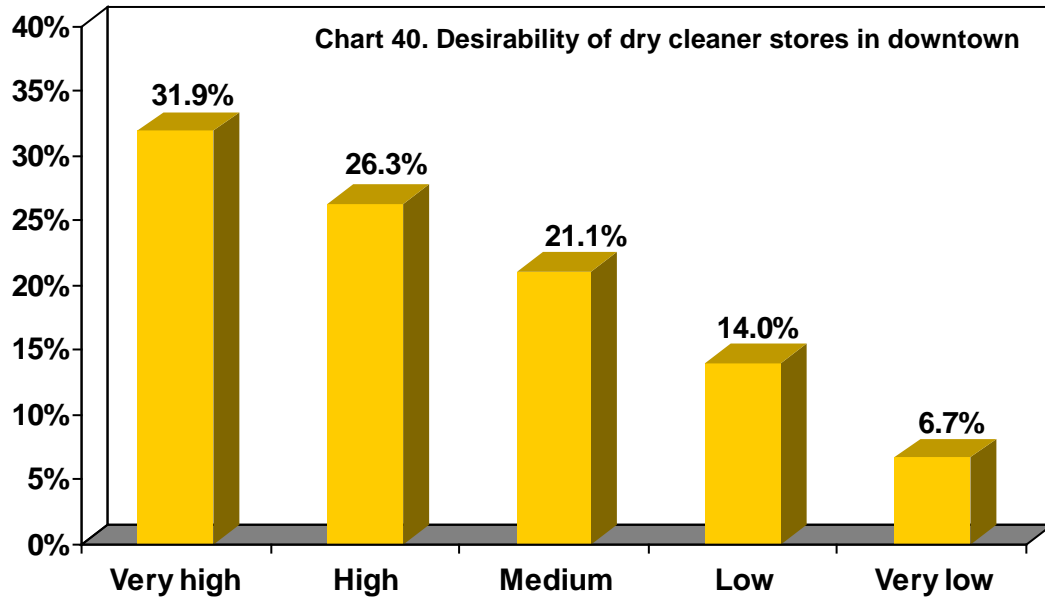
Neiman Marcus: Neiman Marcus, Nordstrom, Barney’s New York, Polo, Jos A Banks, Sephora, Bloomingdales, Channel, Saks, Victoria’s

Target: Target, Wal-Mart, Kohl's, Sears.

Retail

3- Dry cleaner stores

A majority of downtown residents (58.2%) rated the desirability of dry cleaner stores as high or very high and 21.1% rated it as medium (Chart 40).



Retail

4- Specialty Stores

This category of stores that include boutiques, gift and electronic stores was rated very high or high by 43.4% of residents. 22.6% rated them as low or very low (chart 41).

