



**Residential Survey  
Downtown Fort Worth  
December 2011**

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Director of Research**

# Background

In September 2011, Downtown Fort Worth, Inc. undertook a survey of downtown residents to better understand and better serve Central Business District dwellers. This is the third residential survey conducted by Downtown Fort Worth Inc. since 2006. The survey was distributed by mail to each household in the downtown; it was addressed to the head of household.

The residential survey highlights 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 the 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, residents, businesses and visitors.

## Survey Methodology

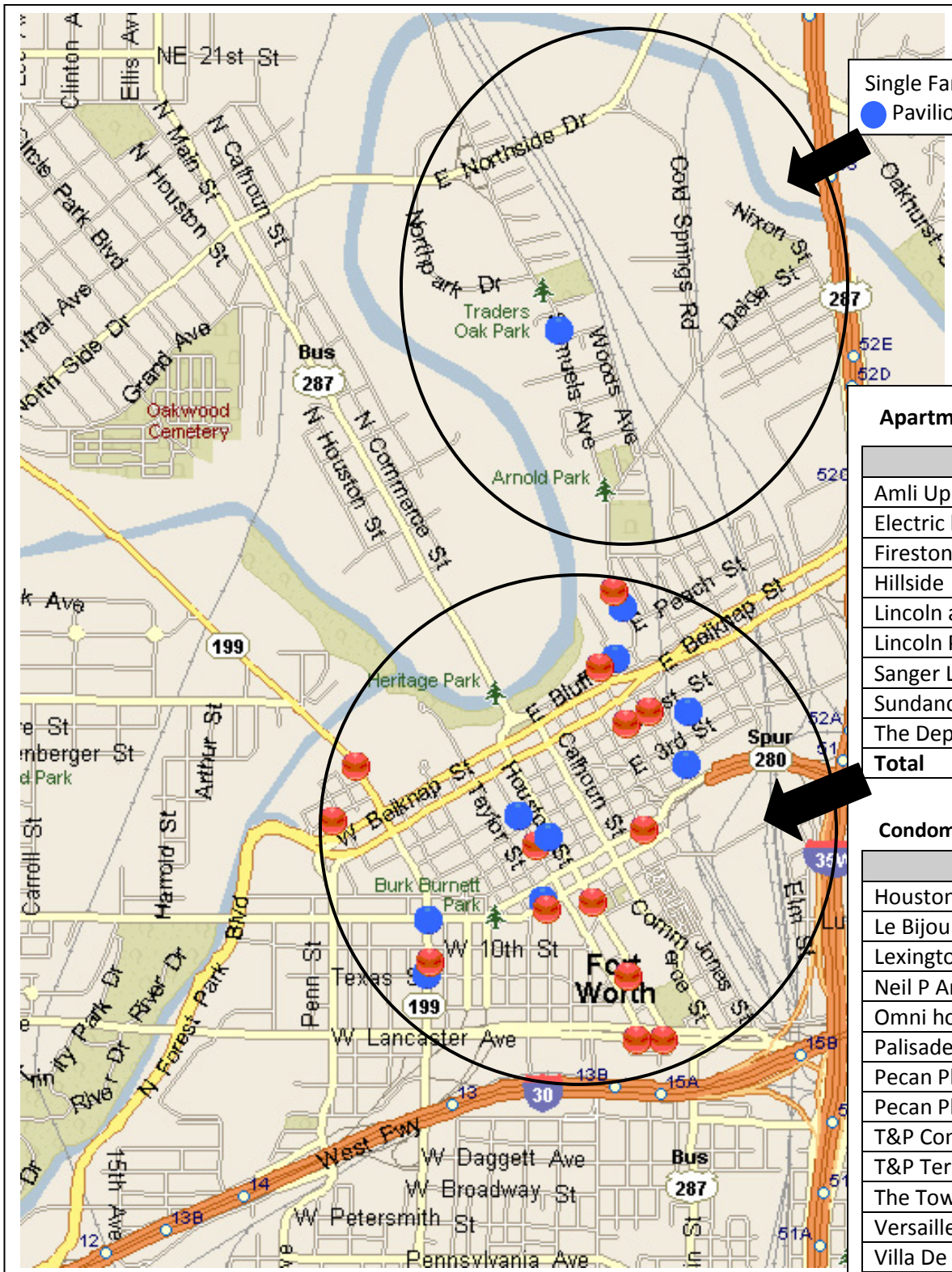
A one sheet survey instrument was mailed to 2,461 households in downtown Fort Worth on September 8, 2011 using first-class postage. A total of 157 surveys were returned and labeled as "Vacant". Another 240 were returned and labeled as "Undeliverable." The total number of delivered surveys was 2,064. The valid responses collected through October 31, 2011 totaled 483. The response rate of 23.4% provides a margin of error of  $\pm 4\%$  at a 95% confidence level. SPSS software version 14 was used to analyze the data.

## Executive summary

- 51.9% of downtown residents are under 45 years old
- Downtown has more residents under 35 years old than over 65 (42.7% and 9.5% respectively).
- Percentage of residents younger than 35 years old who live in apartments: 57.7%
- Percentage of residents younger than 35 who live in condominiums and townhomes: 27.4%.
- 68% of apartment renters and 52.6% of condominium and townhome owners are unmarried.
- 92.6% of households have no children living in the household.
- Downtown residents are highly educated. 42.6% of residents have a Bachelor's degree, 17.3% a master's degree and 16.2% a doctoral degree (including JDs).
- A higher percentage of residents with doctoral degrees live in condominiums and townhomes than in apartments, 22.9% and 12.5% respectively.
- Lifestyle was cited by 54.4% of condominium and townhomes owners as the primary reason for living downtown.
- **42.8% of downtown households have income exceeding \$100,000 per year.**
- Median annual household income for condominium and townhome owners is \$125,000; for apartments, \$83,000 and for owners of single family residences, \$44,500 per year.
- 36.9% cited cities in the Metroplex other than Fort Worth as their previous place of residence; 35% cited Fort Worth; 7.7% cited Texas outside of the Metroplex; and 13% other states.
- 17.8 % of downtown residents work in downtown.
- 83% of downtown residents are in full time jobs; 11.9% are retired; 3.4% are students and 1.6% are not employed.
- 15.6% of downtown residents are employed in the healthcare field, 9.1% in education, 8.8% in science and engineering and 7.2% in law.
- A majority of residents (67.2%) works in Fort Worth.
- **Downtown residents patronize downtown business establishments.** 88.8% go to downtown restaurants, 71% to bars, 59.6% to movies, 51.3% to convenience/drug stores, 49.9% to live entertainment, and 39.8% to retail stores.
- 92.1% of condominium and townhome owners eat at downtown restaurants an average of 7.3 times per month and spend \$69.20 per visit.
- 91.5% of residents have attended the Main Street Fort Worth Arts Festival at least once in last 5 years.
- **Residents perceive downtown as safe.** 96.8% of residents rated their neighborhood as safe or very safe.
- 81.5% of residents feel very safe walking in downtown during the day. The remaining 18.5% feel safe.

- 26.9% of residents feel very safe walking in downtown after dark, 60.2% safe, 11.8% unsafe and 1.1% very unsafe.
- Of those who feel unsafe or very unsafe, 68% live in apartments.
- **Residents perceive downtown as clean.** 93.7% of residents rated the sidewalks and streets in their neighborhood as clean or very clean.
- 27.1% of residents rated homelessness as not a serious problem, 41.1% somewhat serious, 19.8% serious and 12% very serious.
- Of those who live in condominiums, townhomes or apartments, homelessness was rated as not serious or somewhat serious:
  - Apartments: 74.6%
  - Condominiums and townhomes: 46.9%
  - Single family residences; 65%

# Location and size of residential properties surveyed



Single Family Residences: 359 units  
 ● Pavilion at Samuels: 32 units

**Apartments** ●

Name	Units
Aml Upper Westside	194
Electric building	106
Firestone	350
Hillside	172
Lincoln at Trinity Bluff	304
Lincoln Park at Trinity	369
Sanger Lofts	59
Sundance West	59
The Depot	209
<b>Total</b>	<b>1,822</b>

**Condominiums and townhomes** ●

Name	Units
Houston Place Lofts	30
Le Bijou	14
Lexington Sq. Townhomes	18
Neil P Anderson	60
Omni hotel Condos	89
Palisades	40
Pecan Place Conds	9
Pecan Place Townh	28
T&P Condos	100
T&P Terminal	138
The Tower	294
Versailles	7
Villa De Leon	23
Westview	50
<b>Total</b>	<b>900</b>

# 1- Gender & Age

The number of downtown households headed by women is 2.4% higher than the number headed by men: 51.2% vs. 48.8% (Chart 1). No significant gender gap was observed between renters and owners. (Chart2).

Chart 1. Gender Distribution

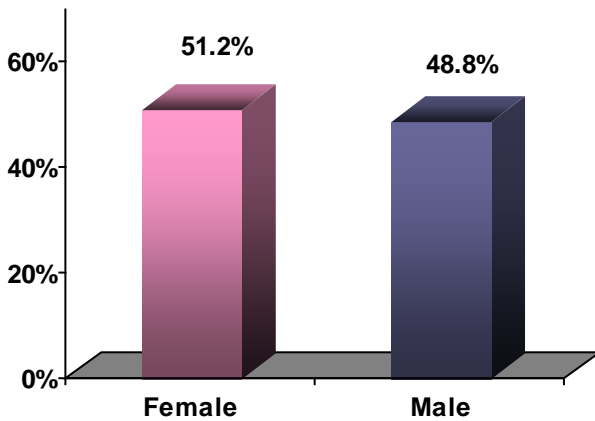
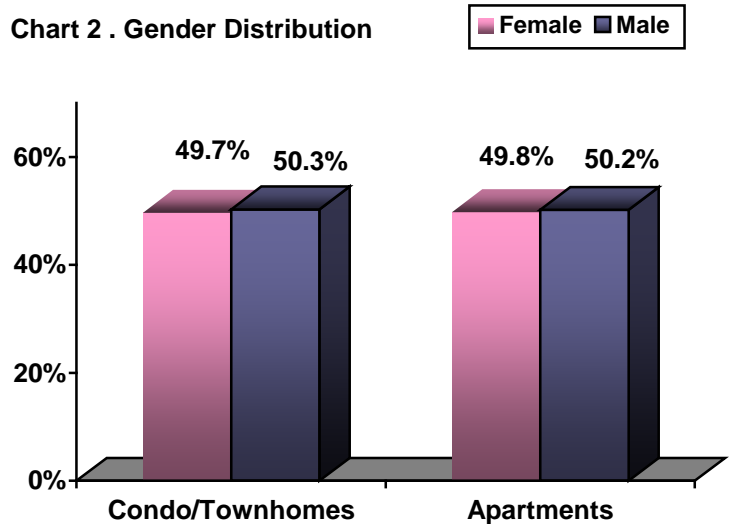
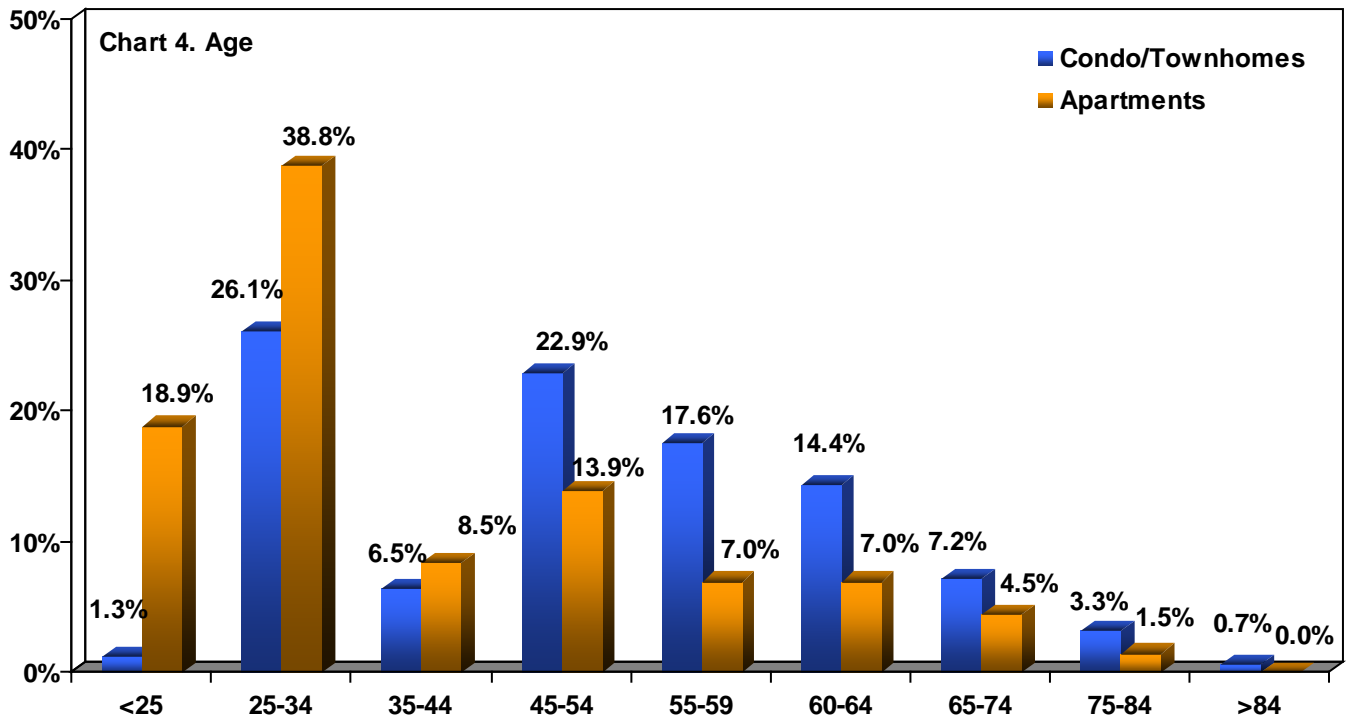
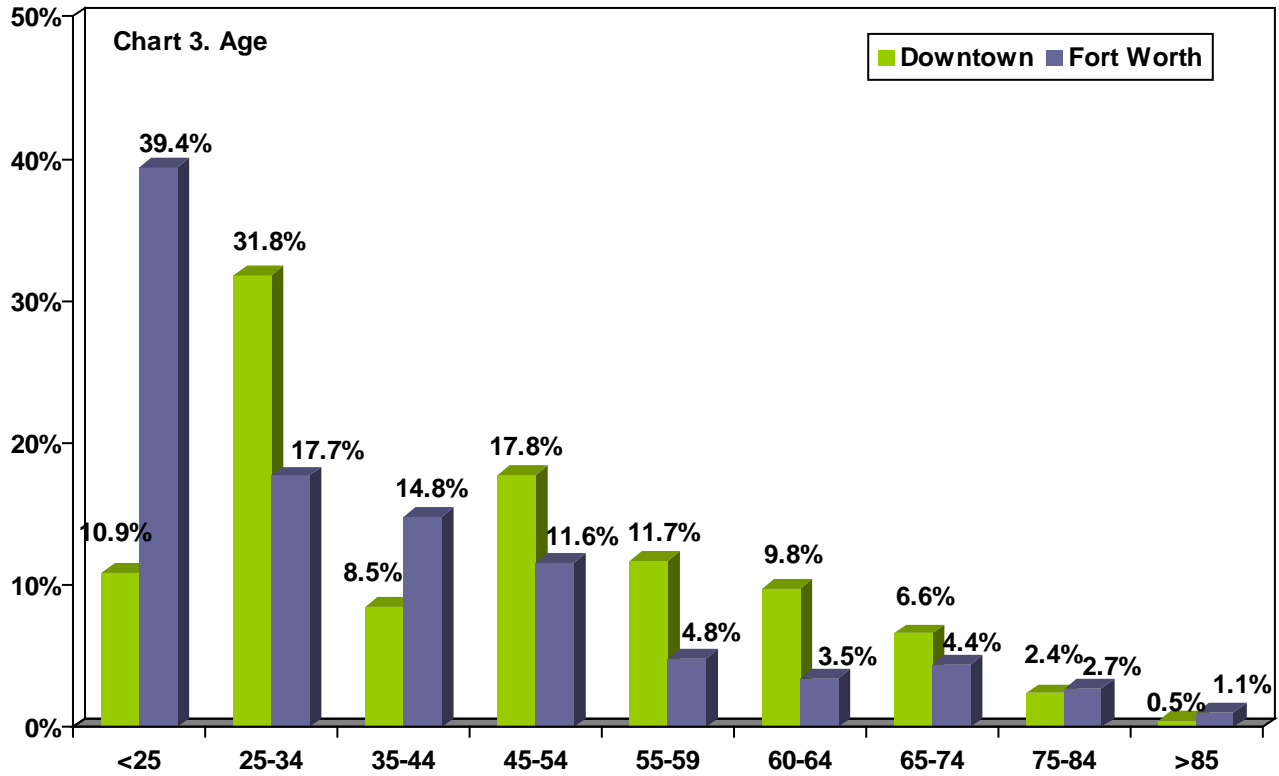


Chart 2 . Gender Distribution



Residents 25-34 years old represent the largest head of household age group in downtown (Chart 3), and the second largest group is 45-54 years old. More households are headed by people under 35 than over 65, 42.7% vs. 9.5%.

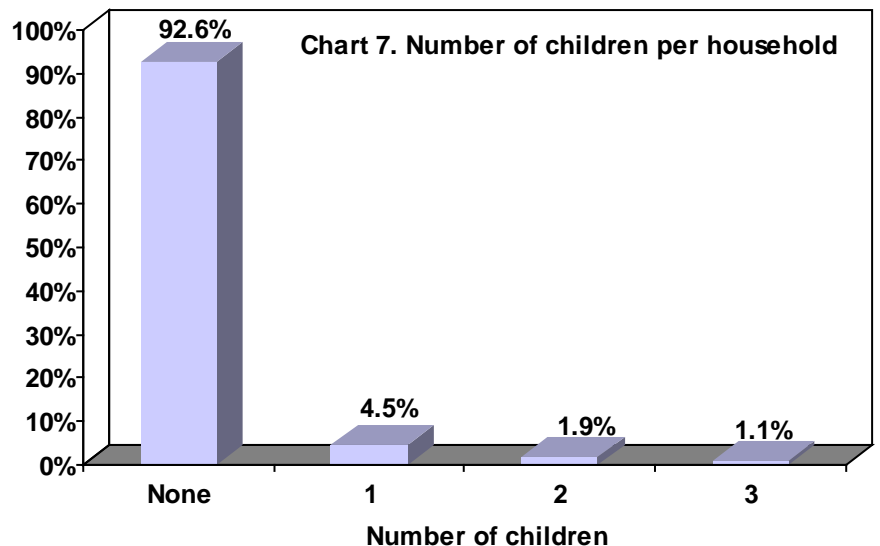
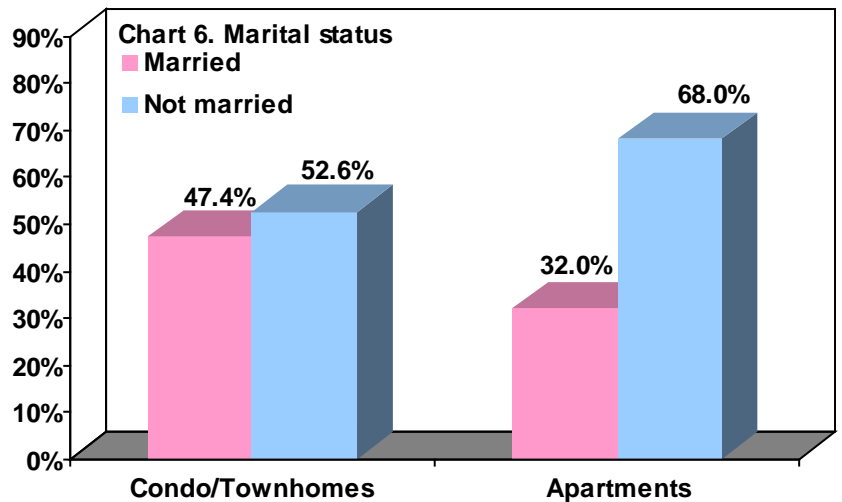
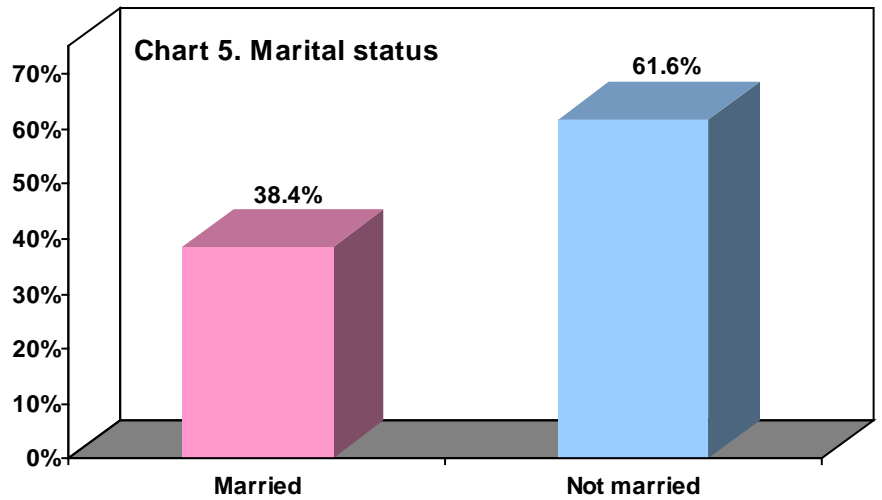
Dominance of the under 35 age group was especially pronounced among renters, at 57.7% of all renting households, and less so among owners, at 27.4% (Chart 4). 18.9% of renters are under the age of 25, while 1.3% of condo/townhome owners are in this age group. For comparison, 39.4% of the city's residents are under 25 and 8.2% 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.

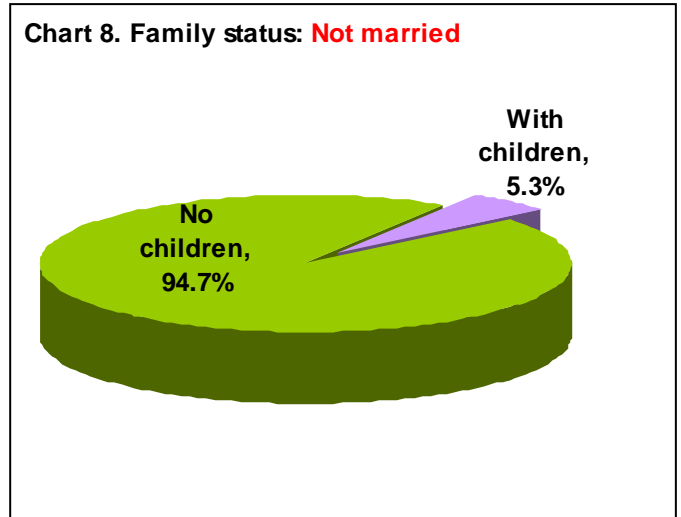
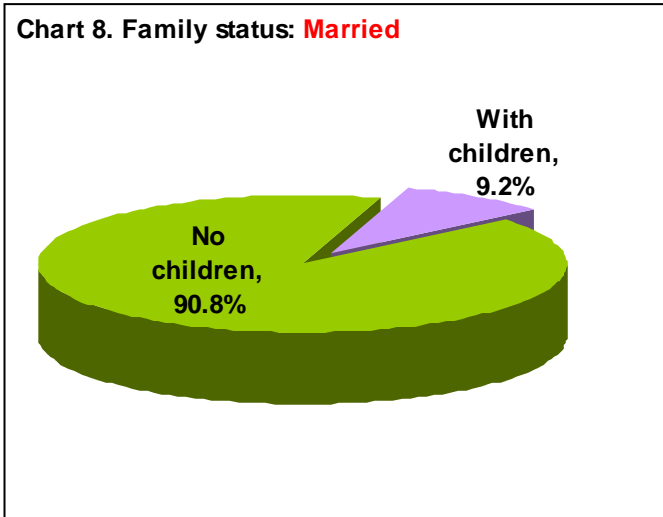


## 2- Marital status

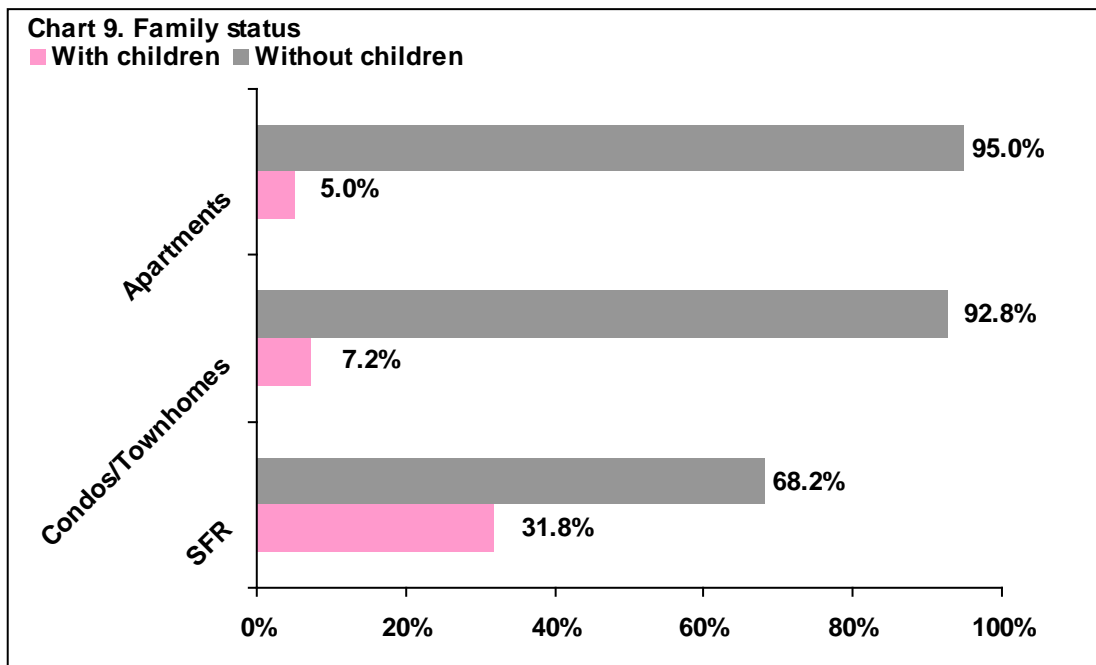
Downtown has a higher percentage of unmarried residents than the city of Fort Worth. The majority (61.6%) of downtown heads of household are not married (chart 5) while 53.2% of households in the city of Fort Worth are headed by unmarried individuals.

Married couples make up 47.4% of households in downtown condo and townhome units, compared to 32% of rental units (Chart 6). An overwhelming majority of households (92.6%) have no children (Chart 7). A majority of households are headed by unmarried, childless individuals (Chart 8). 90.8% of married couples are without children in the residence; 9.2% are married with children. Among households with unmarried persons, 94.7% are without children in the households and 5.3% reported presence of at least one child in the household.



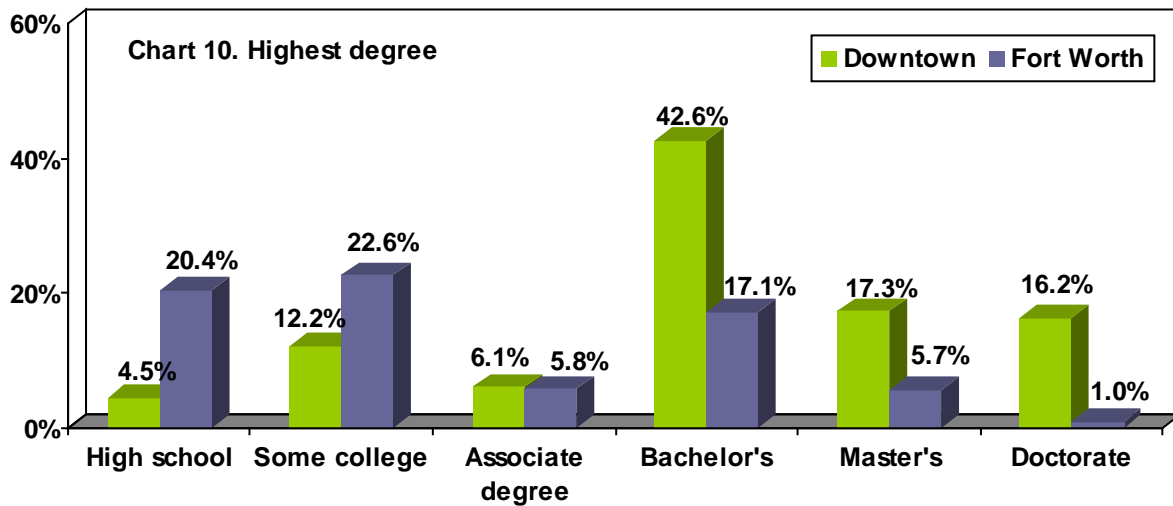


Single family residences have the highest percentage of households with children, 31.8% (Chart 9). Households with children among condos/townhomes and apartments were significantly lower than single family residence (7.2% and 5.0% respectively).



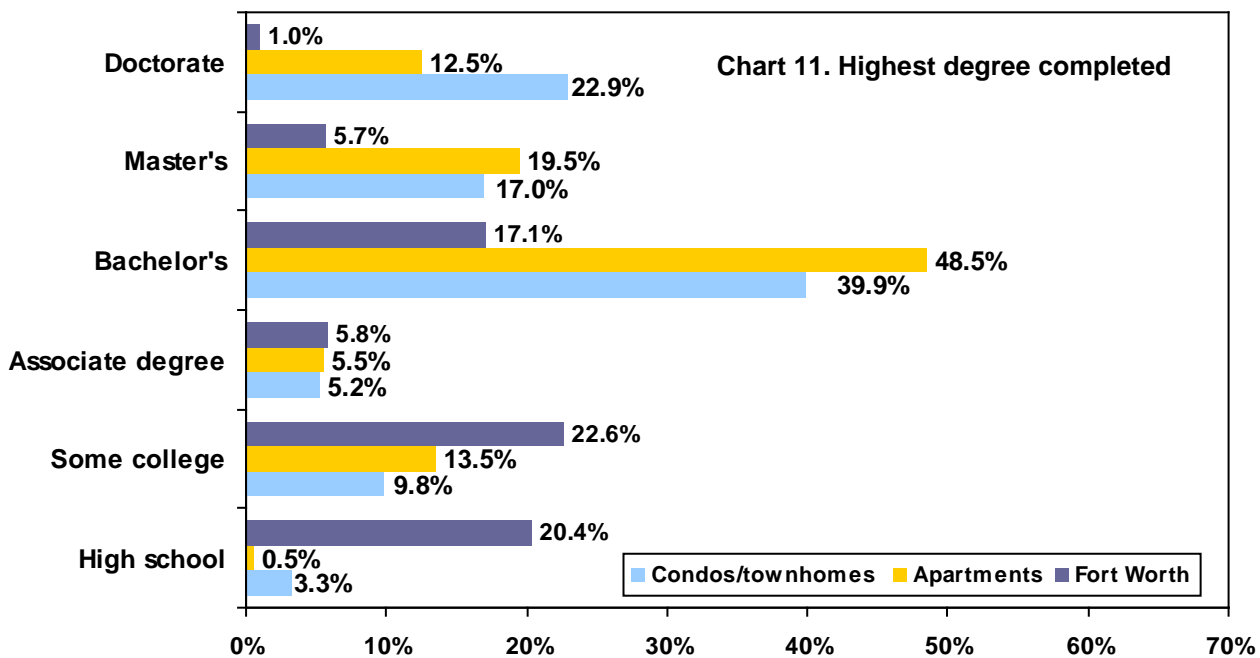
### 3- Educational attainment

76.1% of downtown heads of household have a bachelor's degree or higher, compared to 23.8% in the city of Fort Worth and 27.9% in USA. Holding a bachelor's degree were 42.6% of downtown heads of household vs. Fort Worth at 17.1% and USA at 17.6% (Chart 10). Holding a Master's degree were 17.3% of downtown heads of household vs. Fort Worth at 5.7% and USA at 7.2%. Holding a doctoral degree were 16.2% of heads of household vs. Fort Worth at 1.0% and USA at 1.2%.



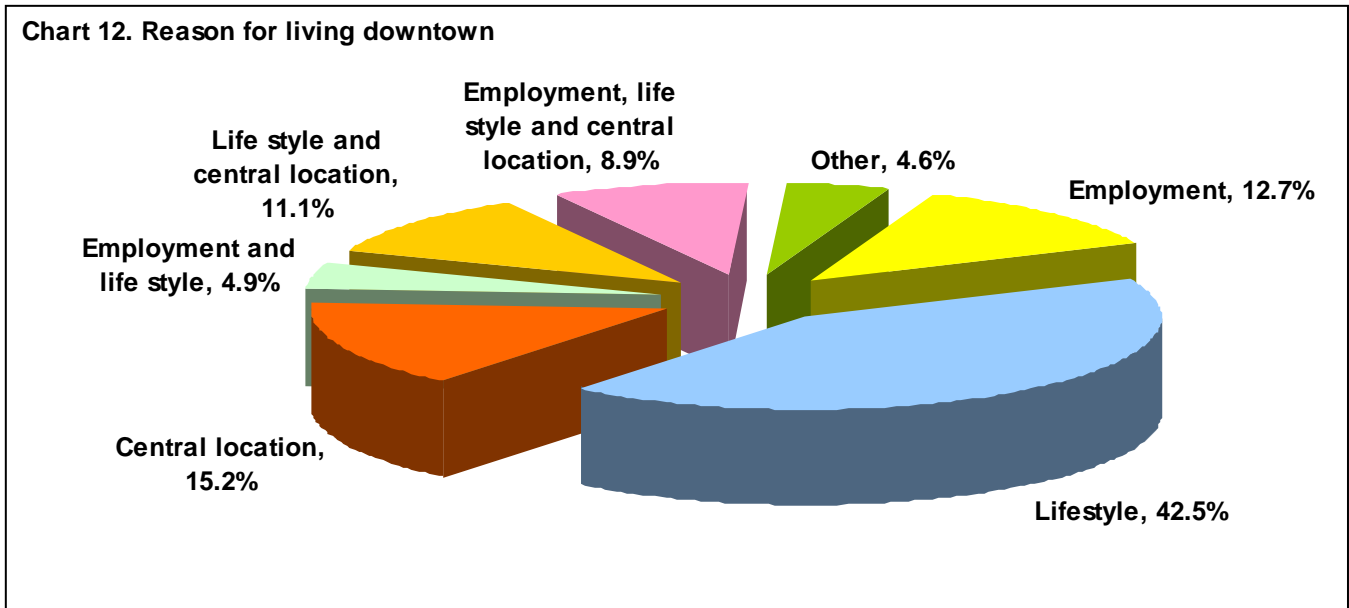
48.5% of downtown renters and 39.9% of condo/townhome owners reported bachelor's degree as the highest attained. 19.5% of renters and 17% of condo/townhome owners reported a master's degree as the highest attained.

12.5% of renters and 22.9% of condo/townhome owners reported a doctorate degree as the highest attained (Chart 11). Nationally, 17.6% have bachelors, 7.2% masters and 1.2% doctorate degrees.

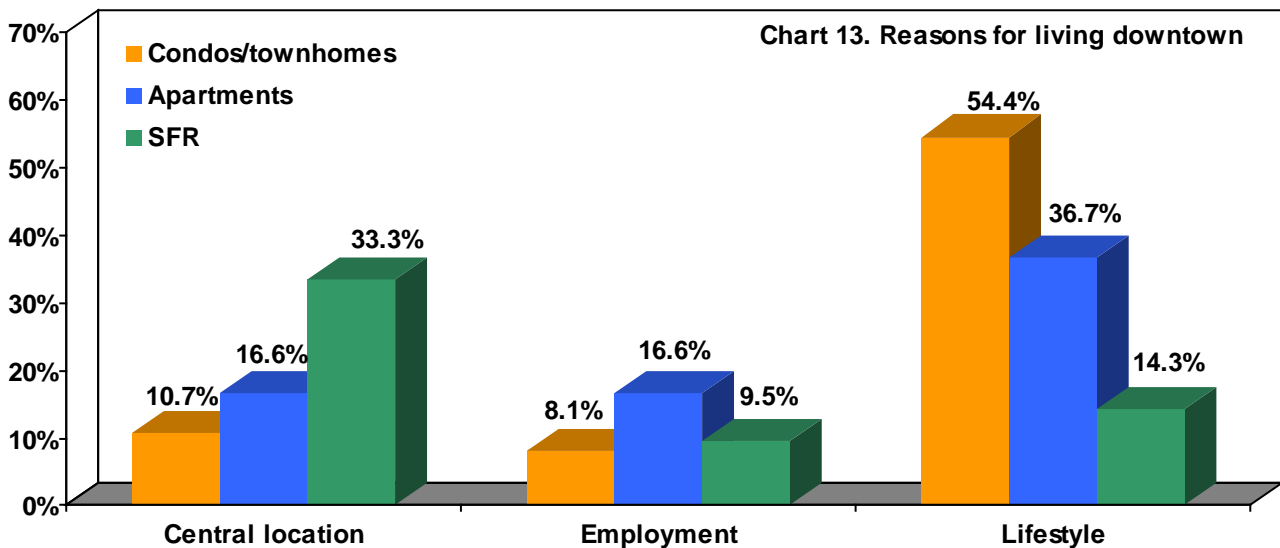


## 4- Reasons for living downtown

Life style was cited as a primary reason for living downtown by 42.5% of residents (Chart 12). Central location was cited by 15.2% of residents for deciding to live downtown. Overall, 67.4% of residents said that life style played a role in deciding to live downtown.

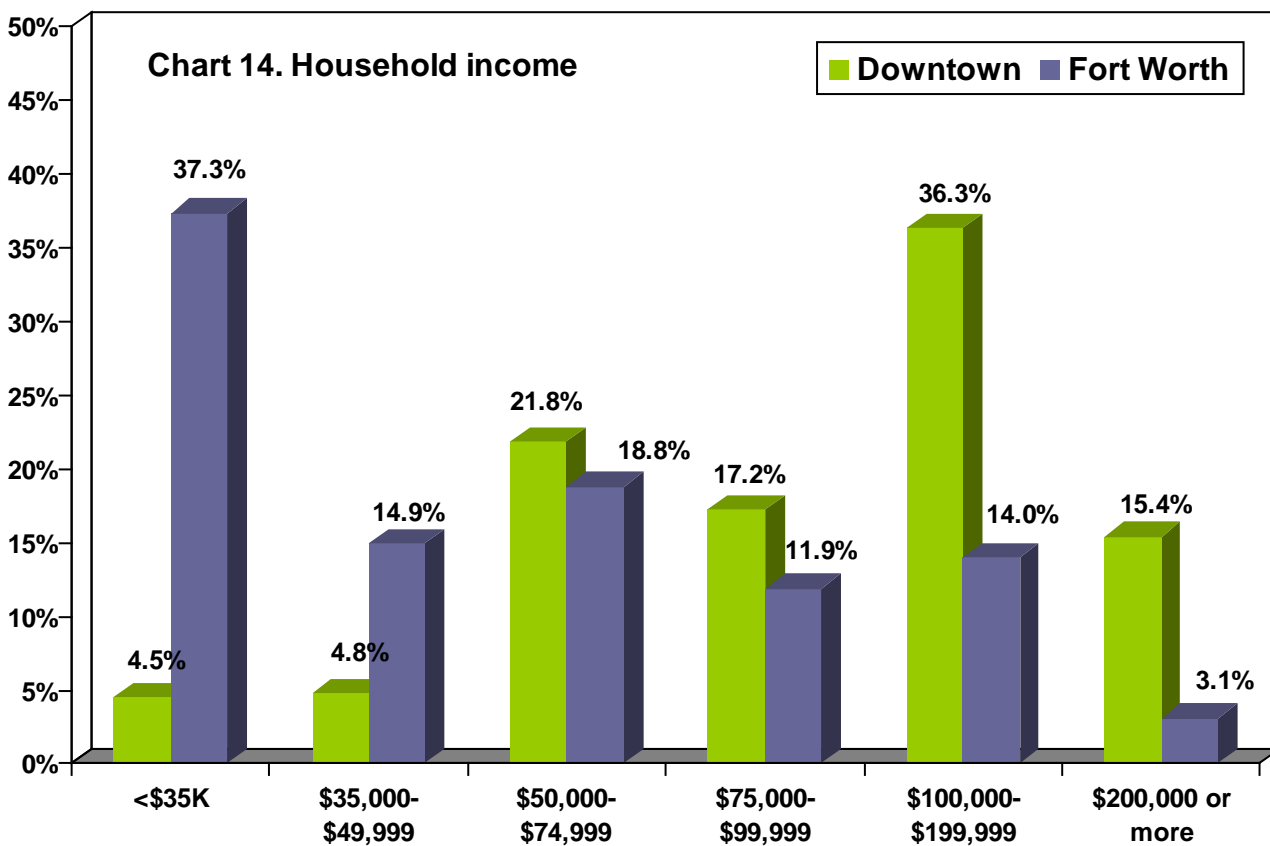


Lifestyle was selected as the primary reason for living downtown by 54.4% of condo/townhome owners and 36.7% of apartment renters. Condo/townhome owners selected central location and employment as second and third choice (10.7% and 8.1%) while apartment renters rated both at 16.6%, chart 13.

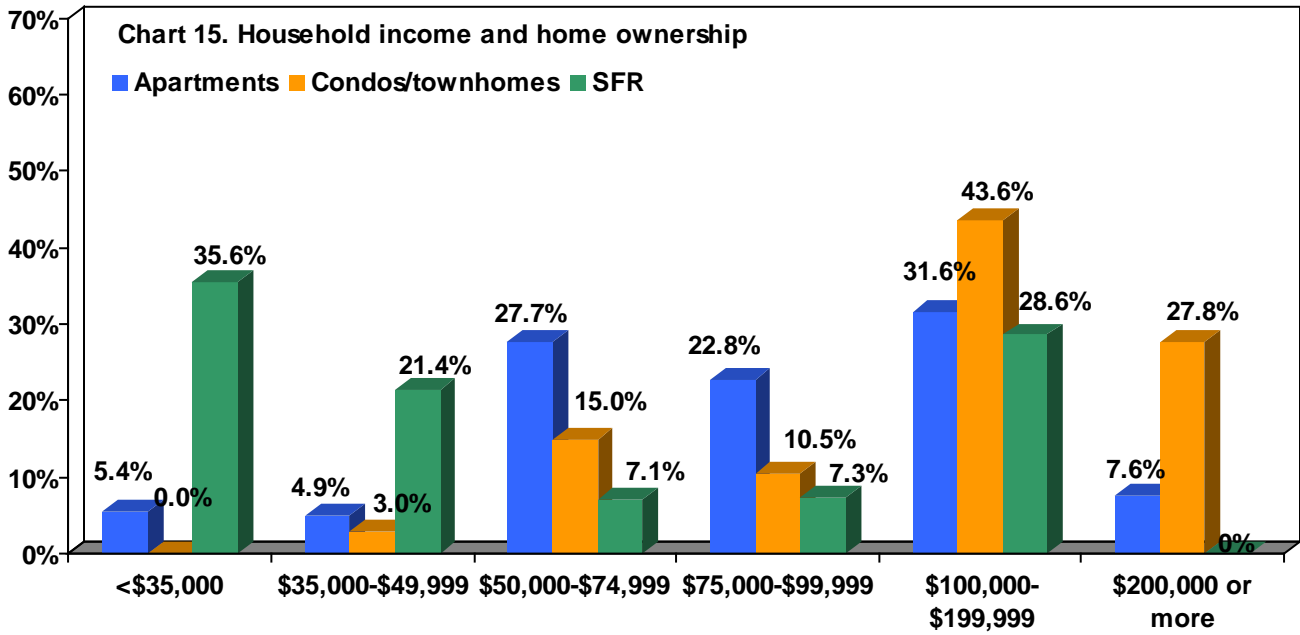


## 5- Income

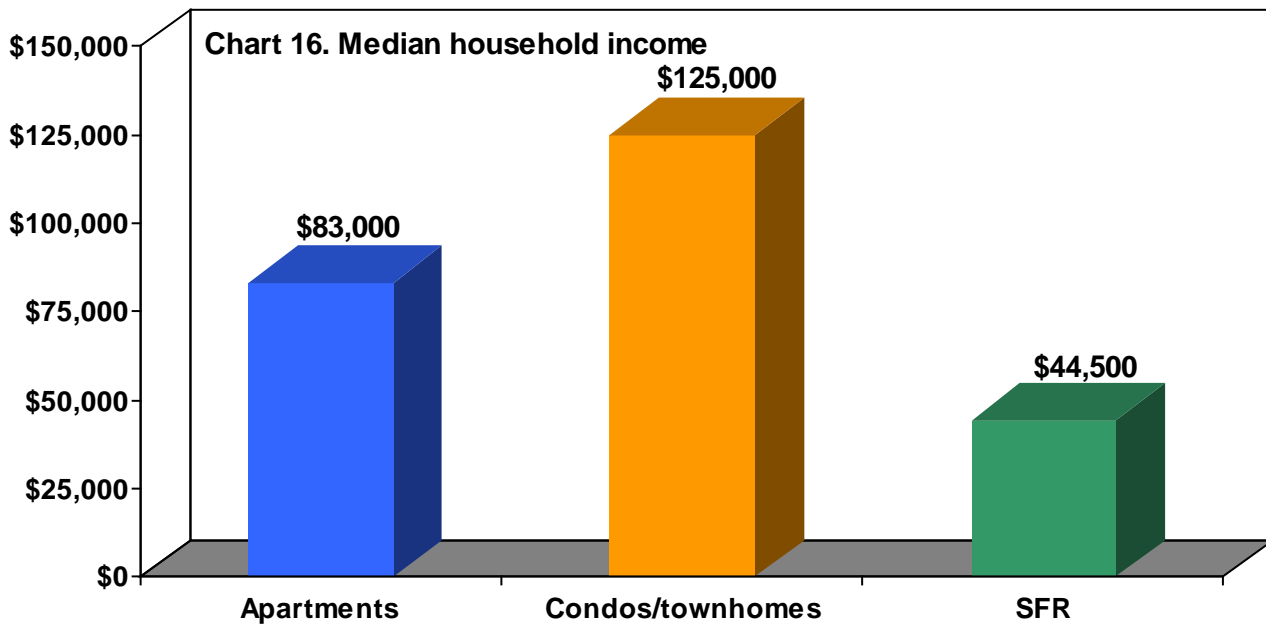
More than 51% of downtown households have incomes exceeding \$100,000 (Chart 14). 17.1% of households in the city of Fort Worth and 16.7% in the city of Dallas have household incomes that exceed \$100,000. The median household income in downtown is \$100,000 significantly greater than the city of Fort Worth median of \$47,634. 90.7% of households in downtown reported gross income that is \$50,000 or more.



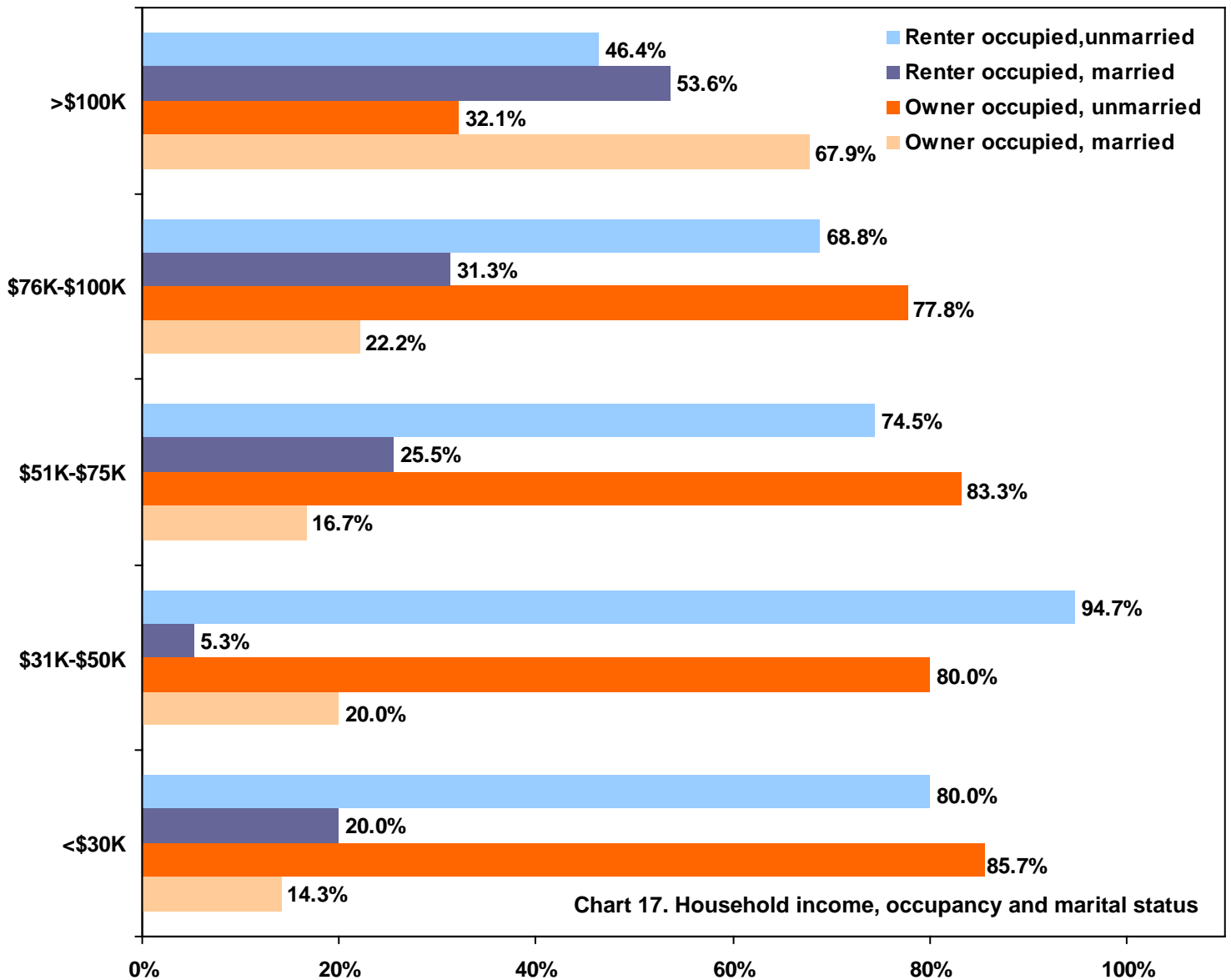
A majority (71.4%) of condo/townhome owners reported household income of at least \$100,000 while 39.2 % of apartment renters and 28.6% of SFR owners reported household income in this range. 35.6% of SFR owners reported household income less than \$35,000 while only 5.4% of apartment renters reported income in this range. (Chart15).



Median household income among condo/townhome owners is significantly higher than apartment renters or SFR owners (\$125,000, \$83,000 and \$44,500 respectively, Chart 16). The median household income for condominium/townhome owners and apartment renters is significantly higher than the city of Fort Worth at \$47,634.

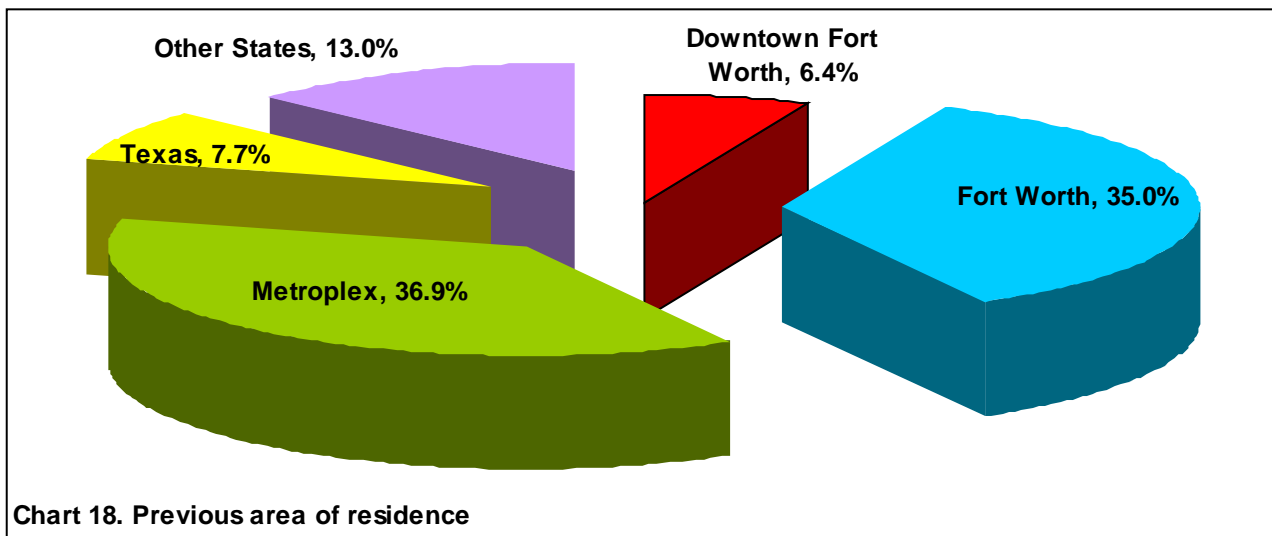


A majority of owner and renter occupied units with household incomes less than \$30,000 are occupied by unmarried persons. Unmarried renters and owners make up a higher percentage of each income bracket except the highest (> \$100,000). 67.9% of owner occupied and 53.6% of renter occupied households with income exceeding \$100,000 are occupied by married couples (Chart 17).

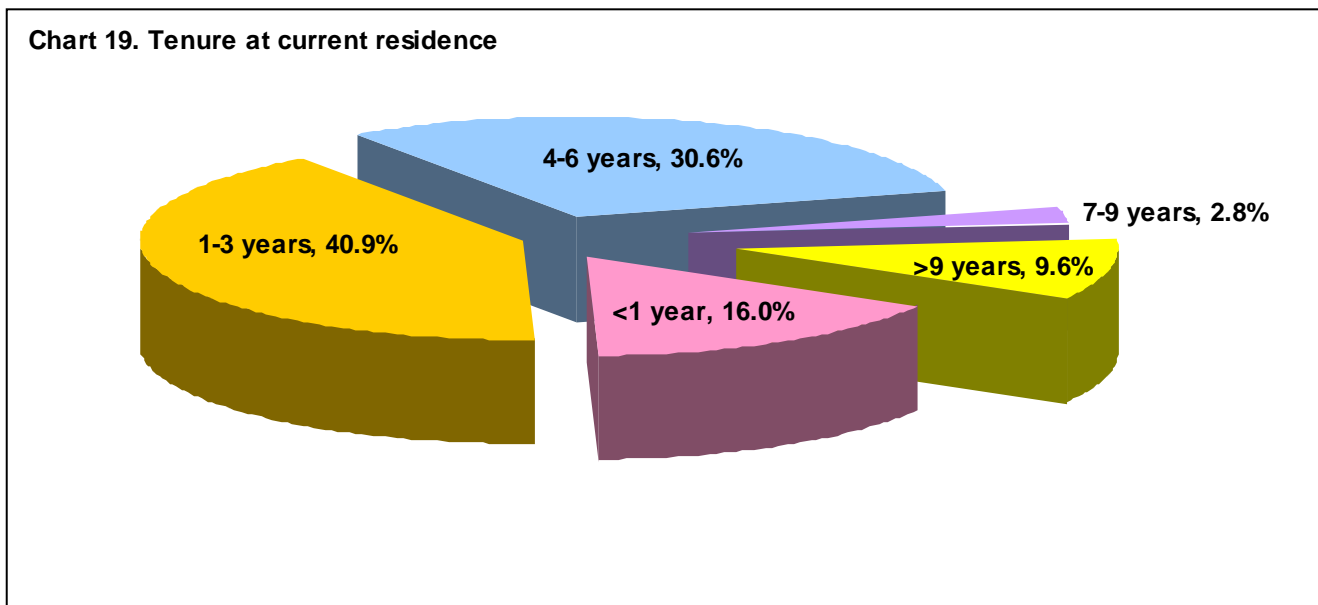


## 6- Previous place of residence and length of tenure

The majority of residents moved to downtown from a location in the Dallas-Fort Worth metropolitan area, 35% from the city of Fort Worth and 36.9% from cities in the Metroplex other than Fort Worth. 7.7% come from other cities in Texas and 13% from out of state. 6.4% reported downtown Fort Worth as their previous place of residence (Chart 18).

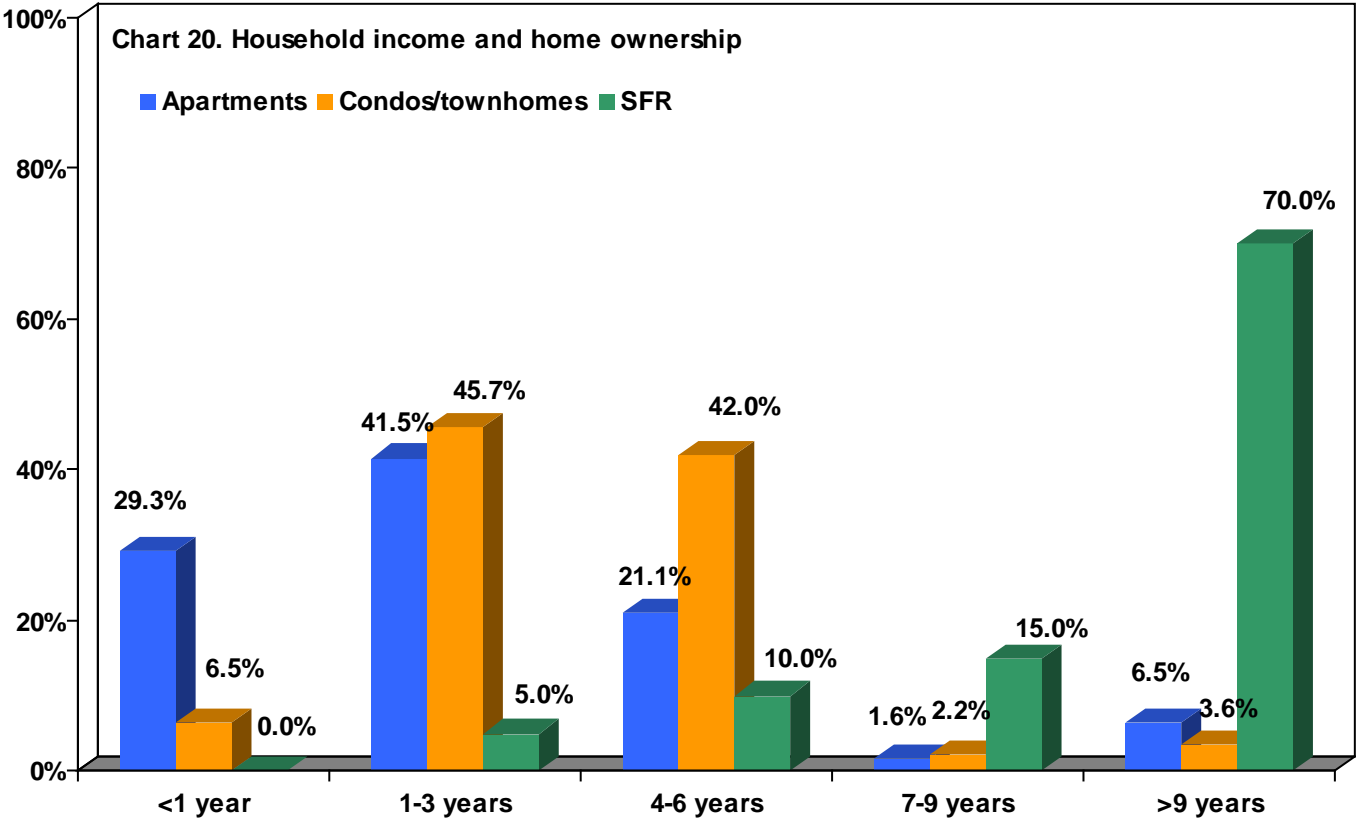


The length of tenure of 56.9% of downtown residents is equal or less than 3 years (Chart 19).



A majority of apartment renters and condo/townhome owners have resided in the current residence equal to or less than 3 years (70.8% and 52.2% respectively). Only 5% of SFR owners are in this group (Chart 20).

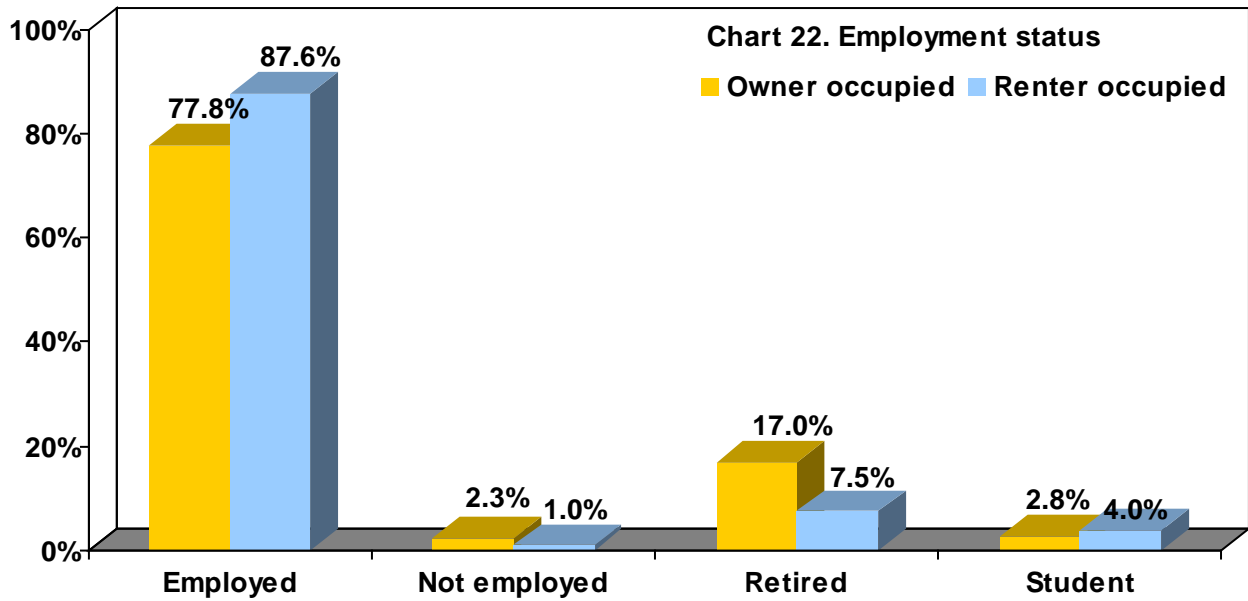
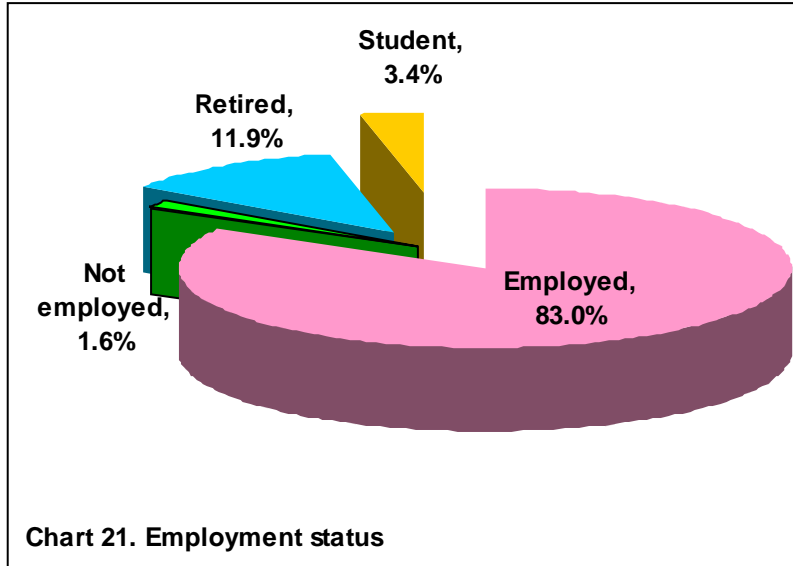
An overwhelming majority (70%) of SFR owners have resided in their current residence more than 9 years, while only 6.5% of apartment renters and 3.6% of condo owners have tenure greater than 9 years.



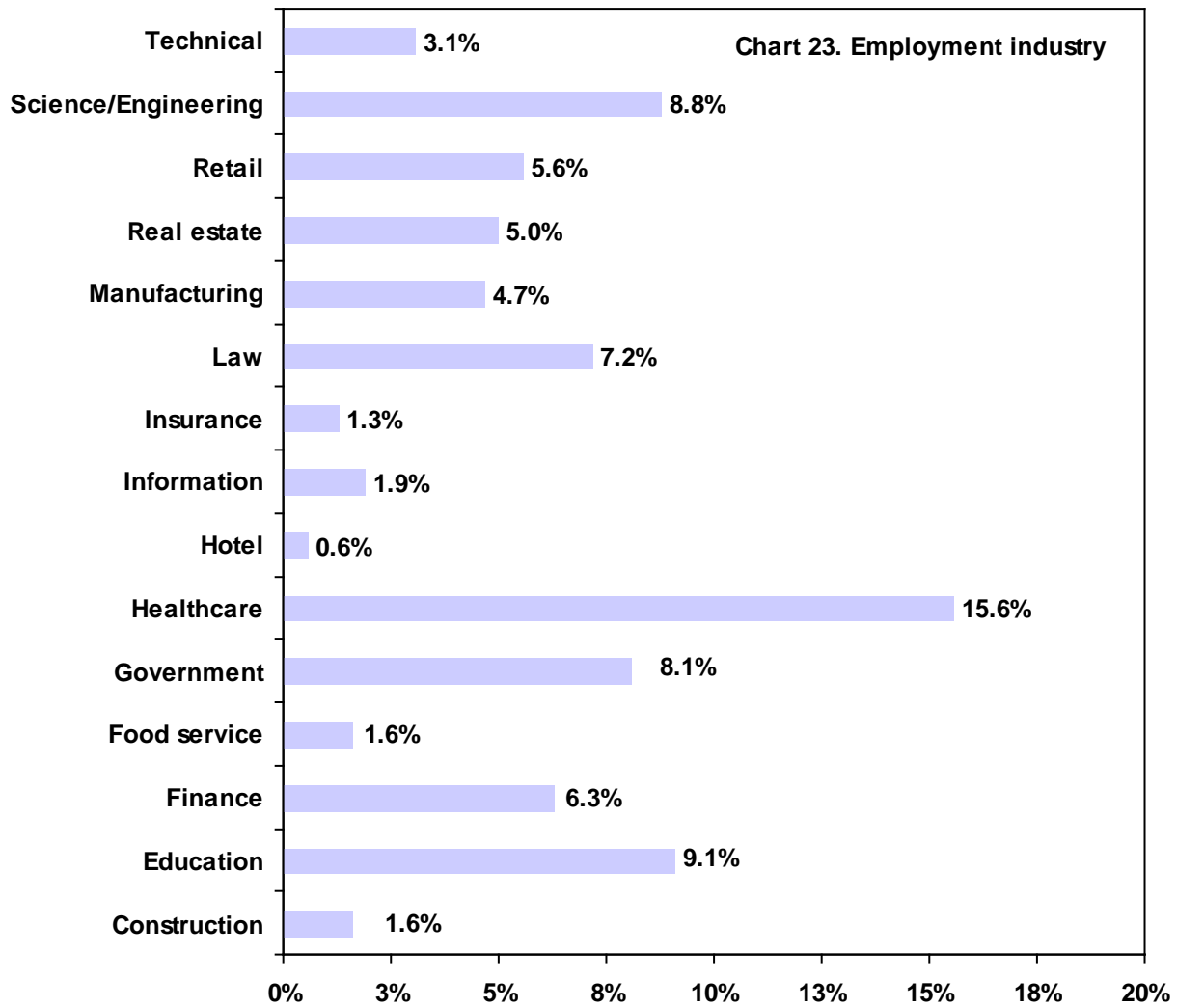
# 7- Employment

83% of downtown residents are employed, 11.9% are retired, 1.6% are not employed and 3.4% are students (Chart 21).

A higher percentage of renters are employed than owners (87.6% and 77.8% respectively). A much higher percentage of homeowners than renters is retired, 17.0% vs. 7.5% (Chart 22).

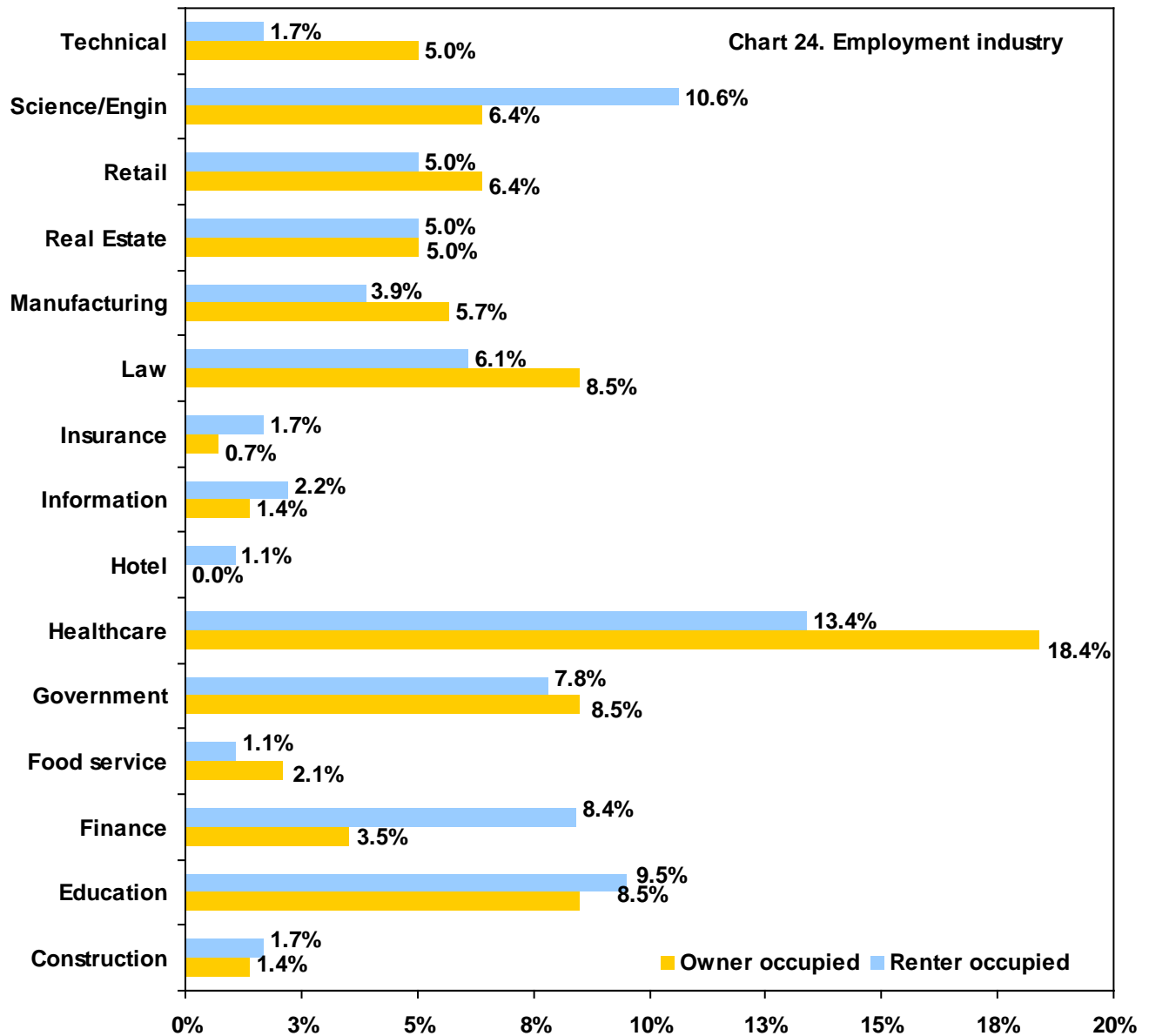


A large percentage of downtown residents (15.6%) work in the health care industry. 9.1% are employed in education and 8.8% in science and engineering. Other industries are listed in Chart 23.

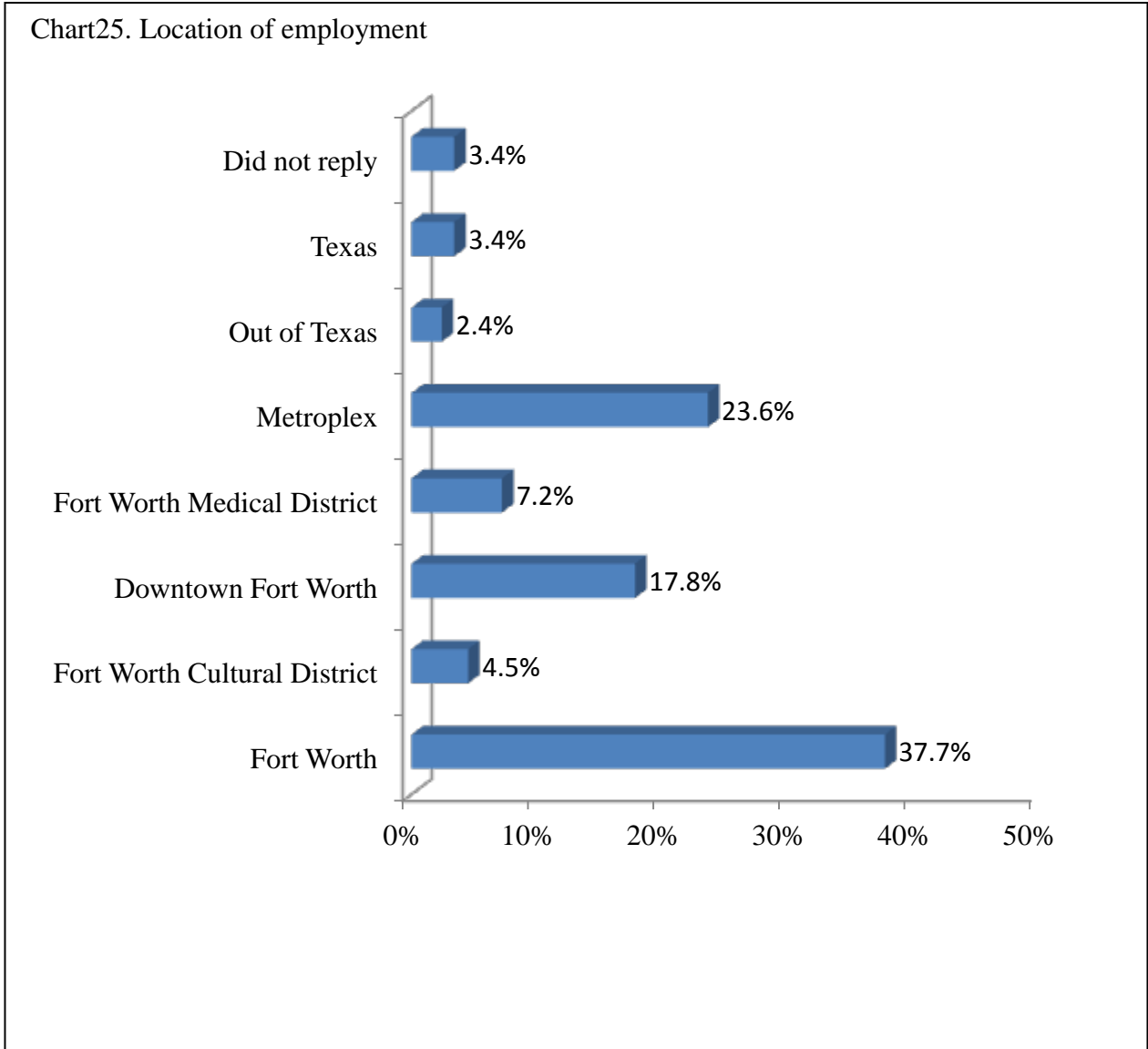


A large portion of home owners (18.4%) and renters (13.4%) is employed in the health care industry (Chart 24). A higher proportion of home owners than renters are employed in government, law, manufacturing, retail, and technical industries.

A higher proportion of home renters than owners are employed in education, finance, information, insurance and science and engineering industries.

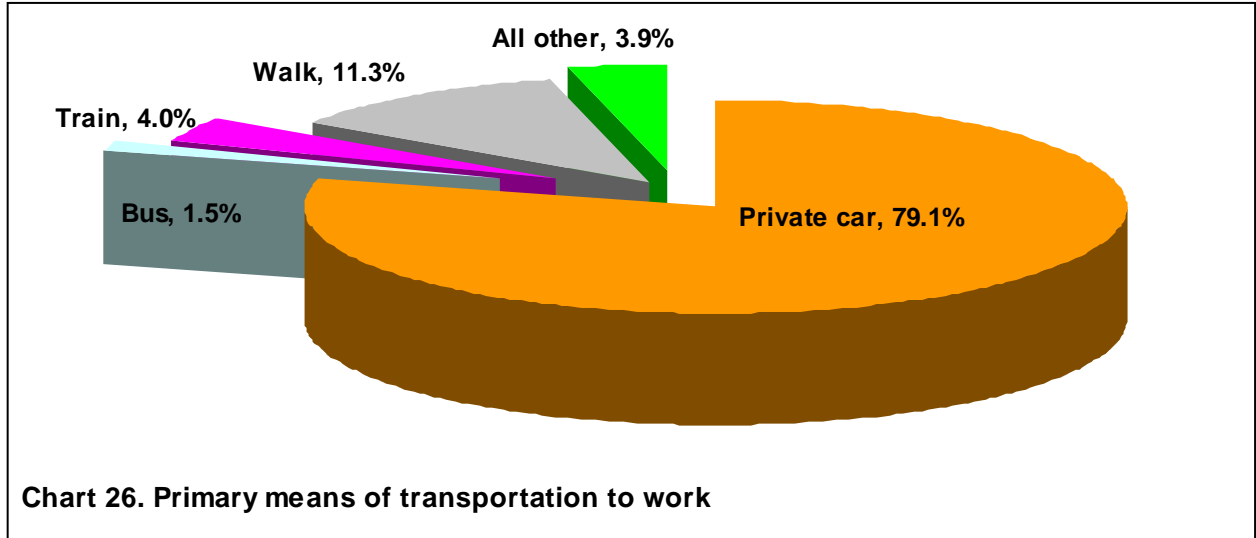


A majority of downtown residents work in Fort Worth (67.2%, Chart 25). 23.6% work in cities in the metropolitan Dallas-Fort Worth-Arlington. Downtown Fort Worth, Medical District and Cultural District are the location of employment for 17.8%, 7.2% and 4.5% of downtown residents.

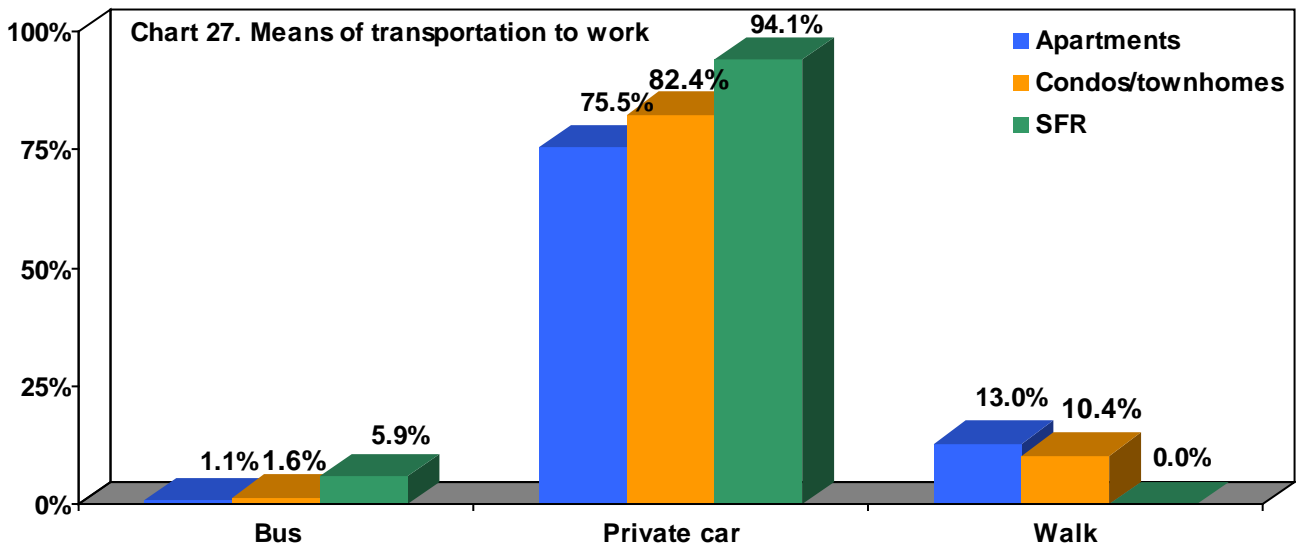


# 8- Transportation

A majority (79.1%) of downtown residents use a private car as the primary means of transportation to work (Chart 26). 11.3% walk to work and 5.5% use public transportation (1.5% bus, 4.0% train).

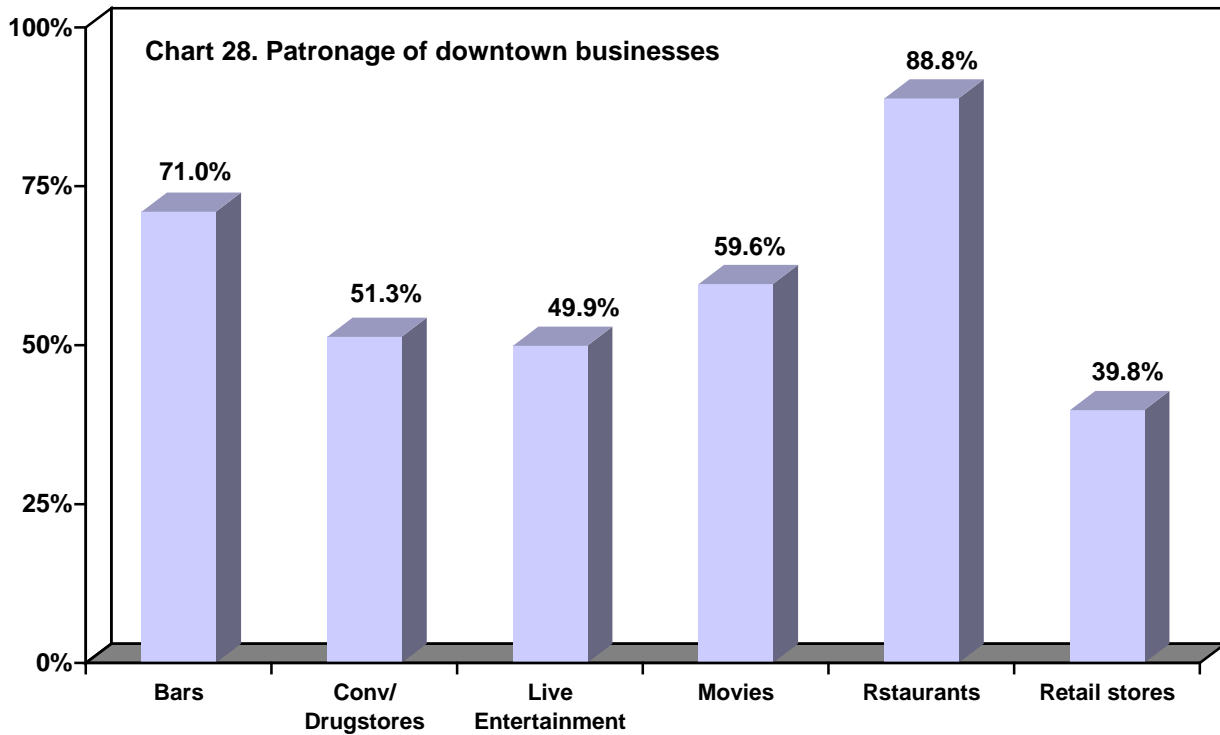


Private car was cited as the primary use of transportation to work by 75.5% of apartment renters, 82.4% of condo/townhome owners and 94.1% of single family residence owners (Chart 27). Buses are used as the primary means of transportation to work by 1.1% of apartment renters, 1.6% of condo/townhome and 5.9% of single family residence owners. More apartment renters walk to work than the condo/town homes and single family residence owners (13.0% vs. 10.4% and 0%). The mean travel time to work is 16.0 minutes and mean travel time to home is 17.2 minutes.

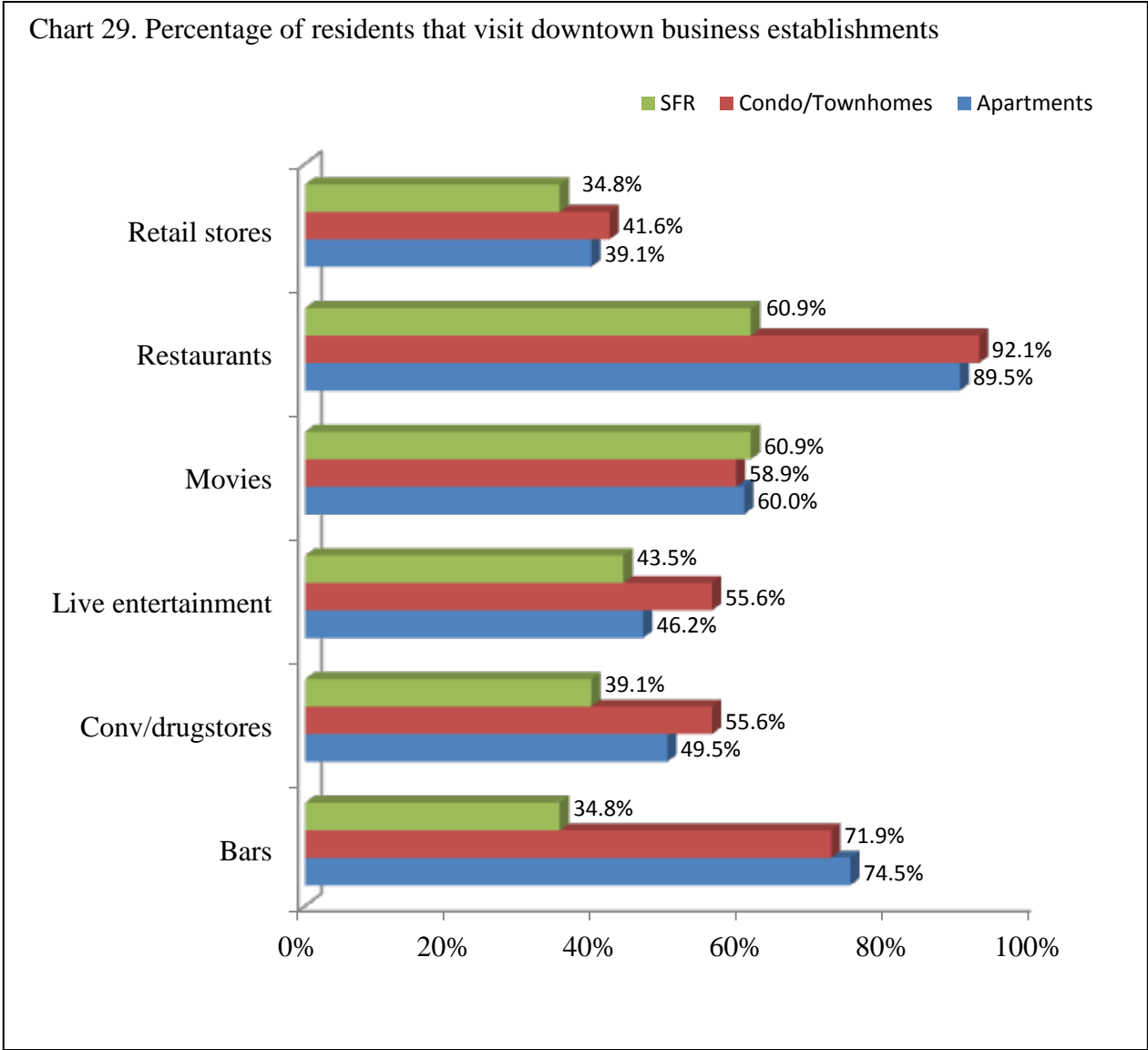


## 9- Retail expenditures

A very large percentage (88.8%) of downtown residents regularly eats at downtown restaurants (Chart 28). Restaurants are the most frequented business establishments in downtown. Downtown bars are the second most visited business by residents (71%).



More renters than owners frequent bars in downtown. Condo and townhome owners more than renters and SFR owners go to convenience/drugstores, live entertainment venues, restaurants and retail stores. Homeowners attend live entertainment venues and frequent convenience and drugstores in downtown more often than renters (Chart 29).



Charts 30 through 41 present average numbers of monthly visits to downtown business establishments and average amount spent per visit. The data are presented by type of ownership.

Chart 30. Average monthly visits to downtown bars

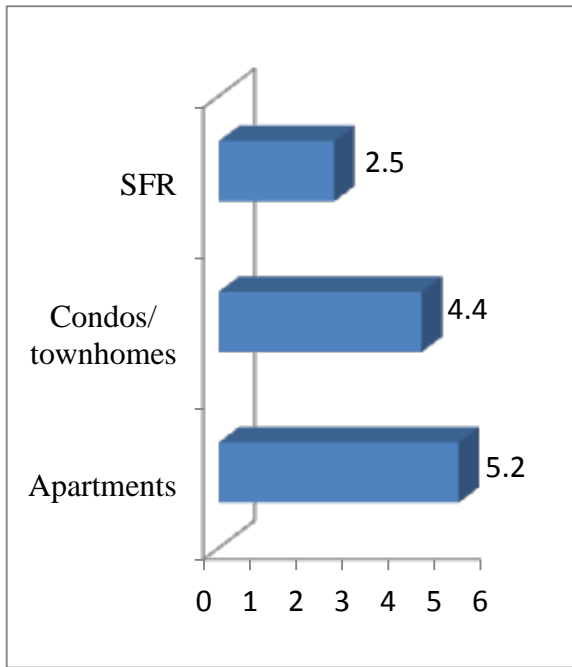


Chart 31. Average spending per visit to downtown bars

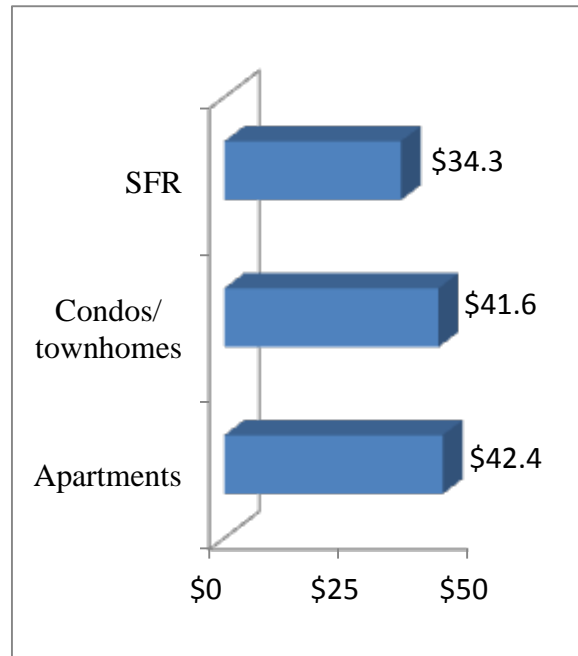


Chart 32. Average monthly visits to downtown convenience/drugstores

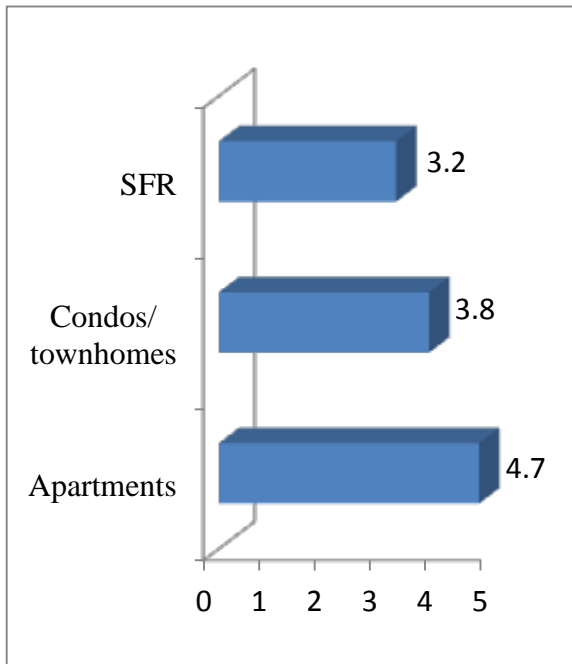


Chart 33. Average spending per visit to downtown convenience/drugstores



Chart 34. Average monthly visits to downtown live entertainment venues

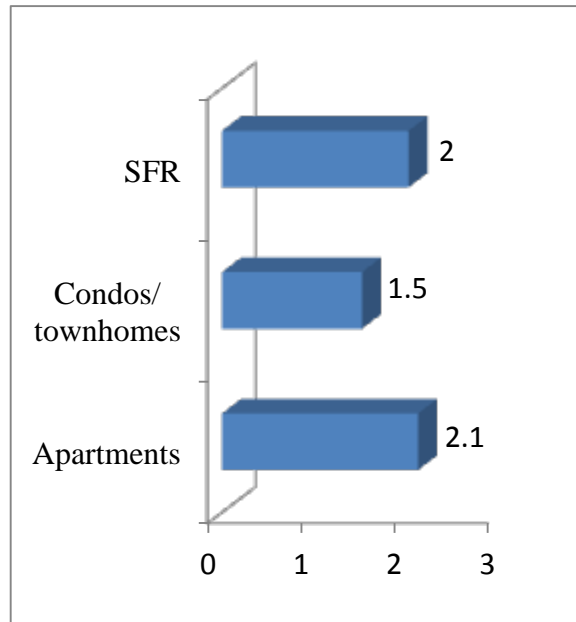


Chart 35. Average spending per visit to downtown live entertainment venues

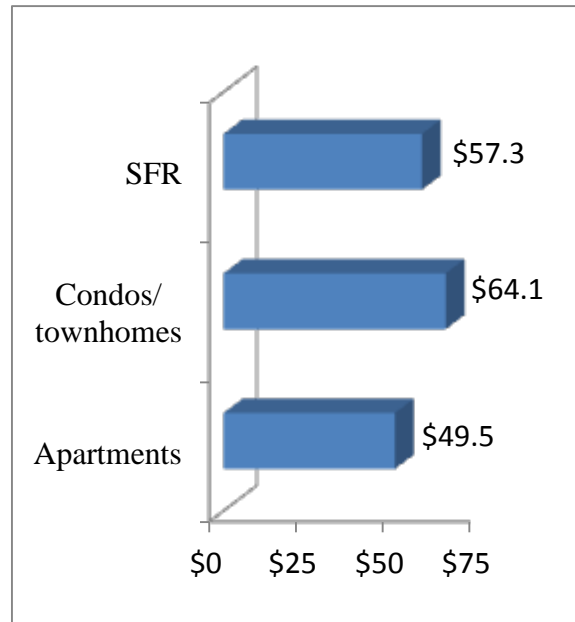


Chart 36. Average monthly visits to downtown movie theaters

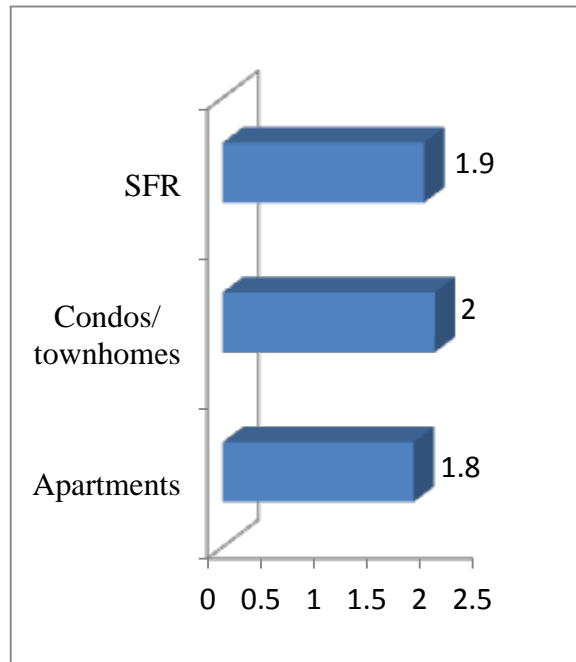


Chart 37. Average spending per visit to downtown movie theaters

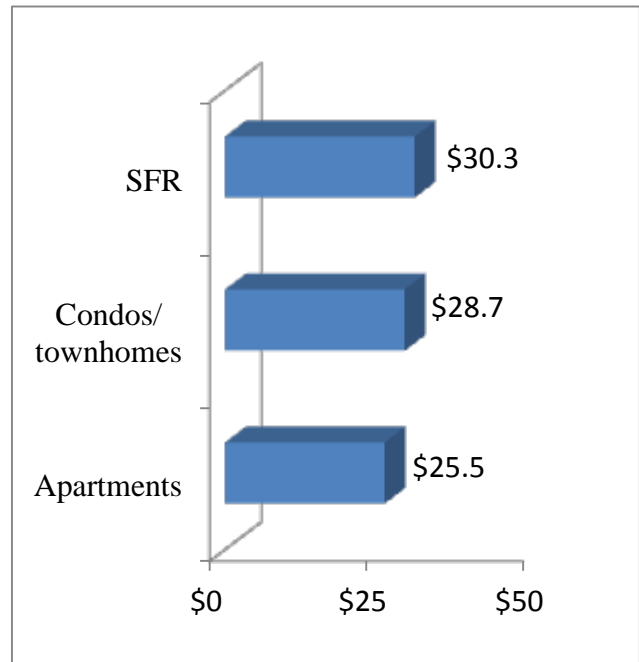


Chart 38. Average monthly visits to downtown restaurants

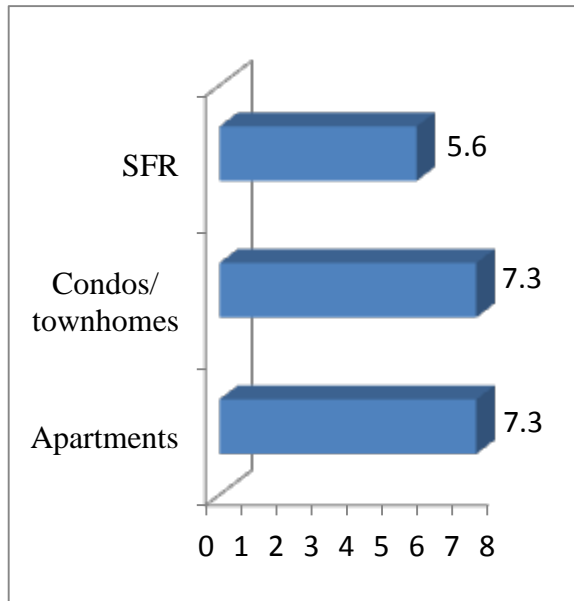


Chart 39. Average spending per visit to downtown restaurants

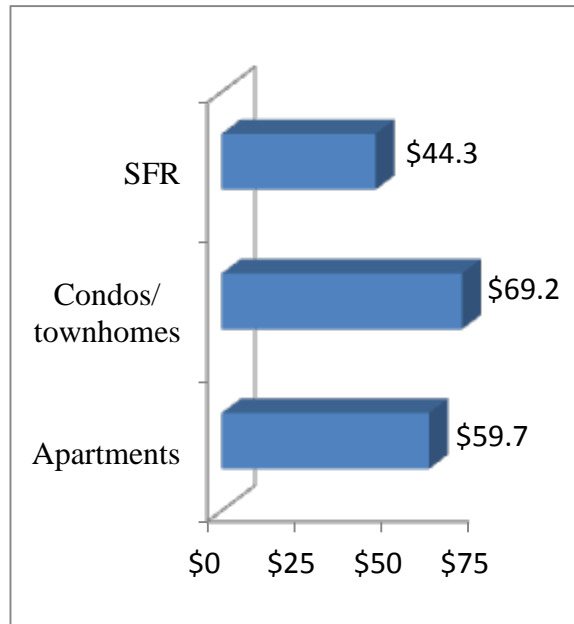


Chart 40. Average monthly visits to downtown retail stores

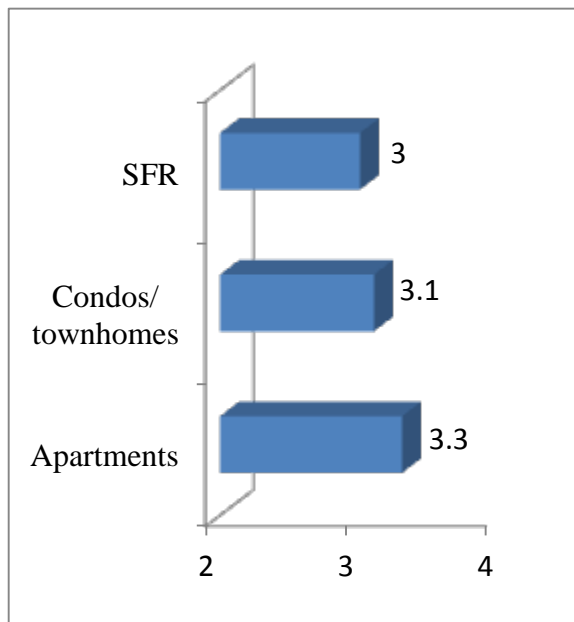
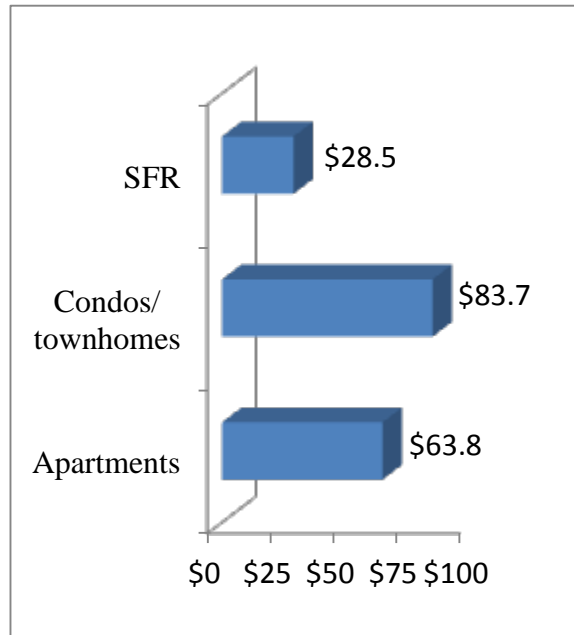


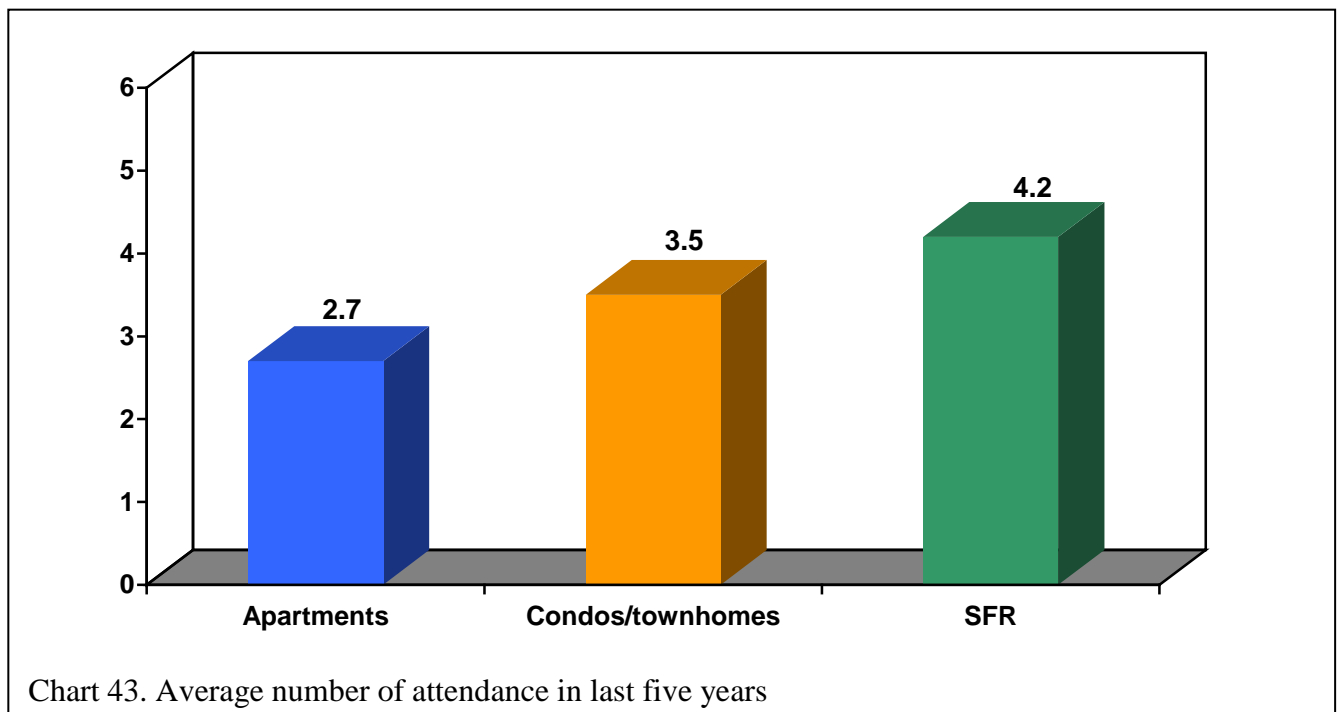
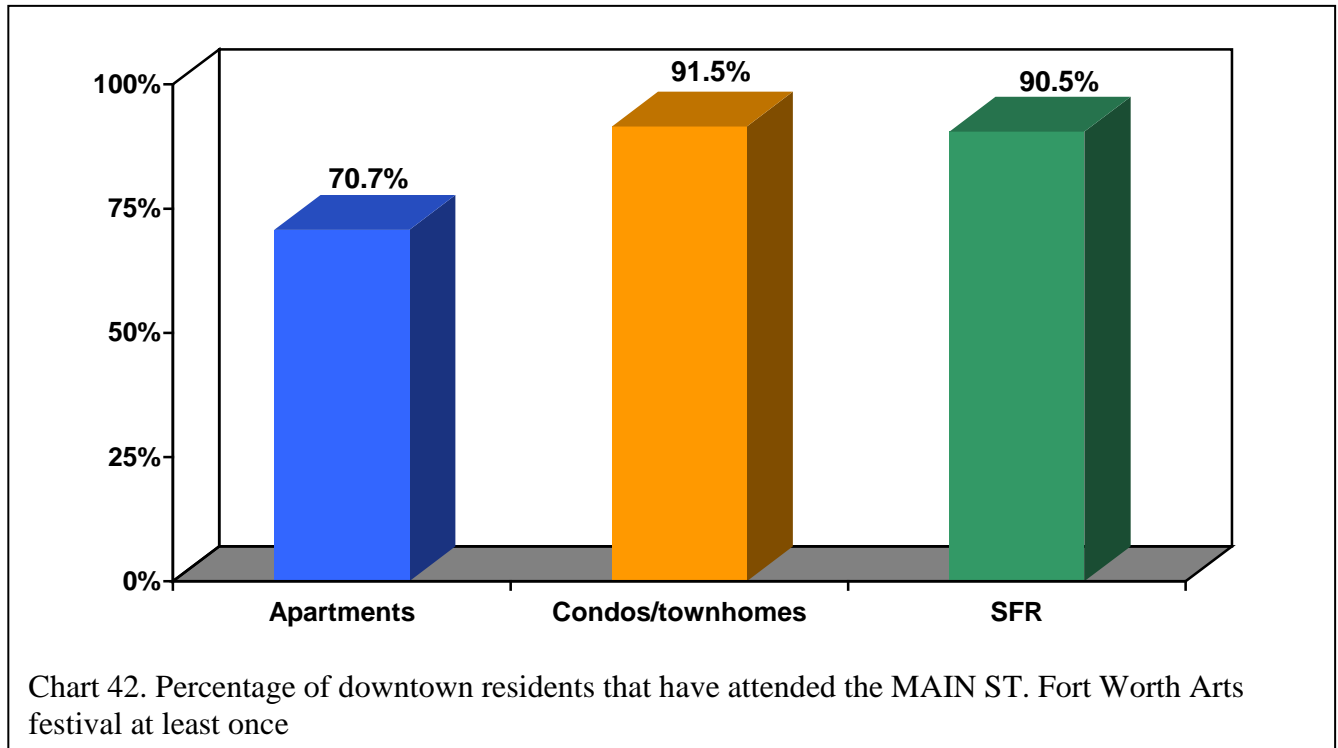
Chart 41. Average spending per visit to downtown retail stores



## 10- Downtown events

### A- MAIN ST. Fort Worth Arts Festival

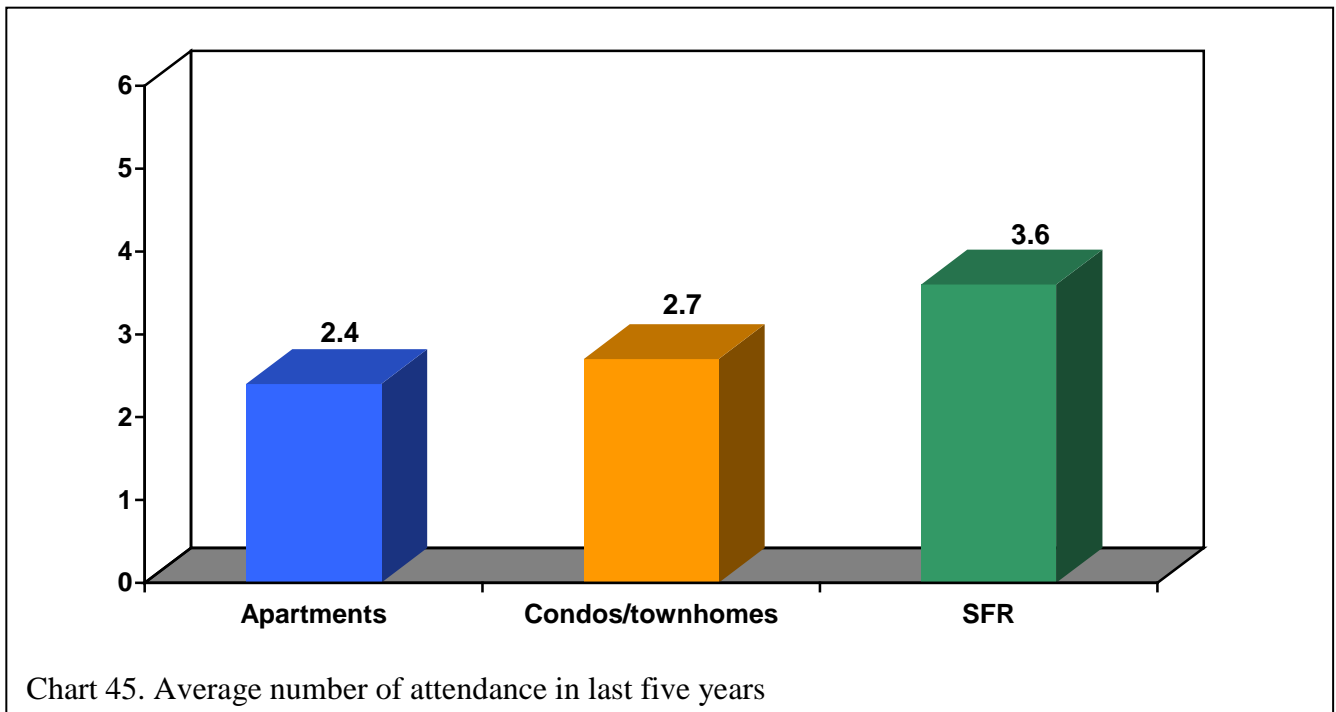
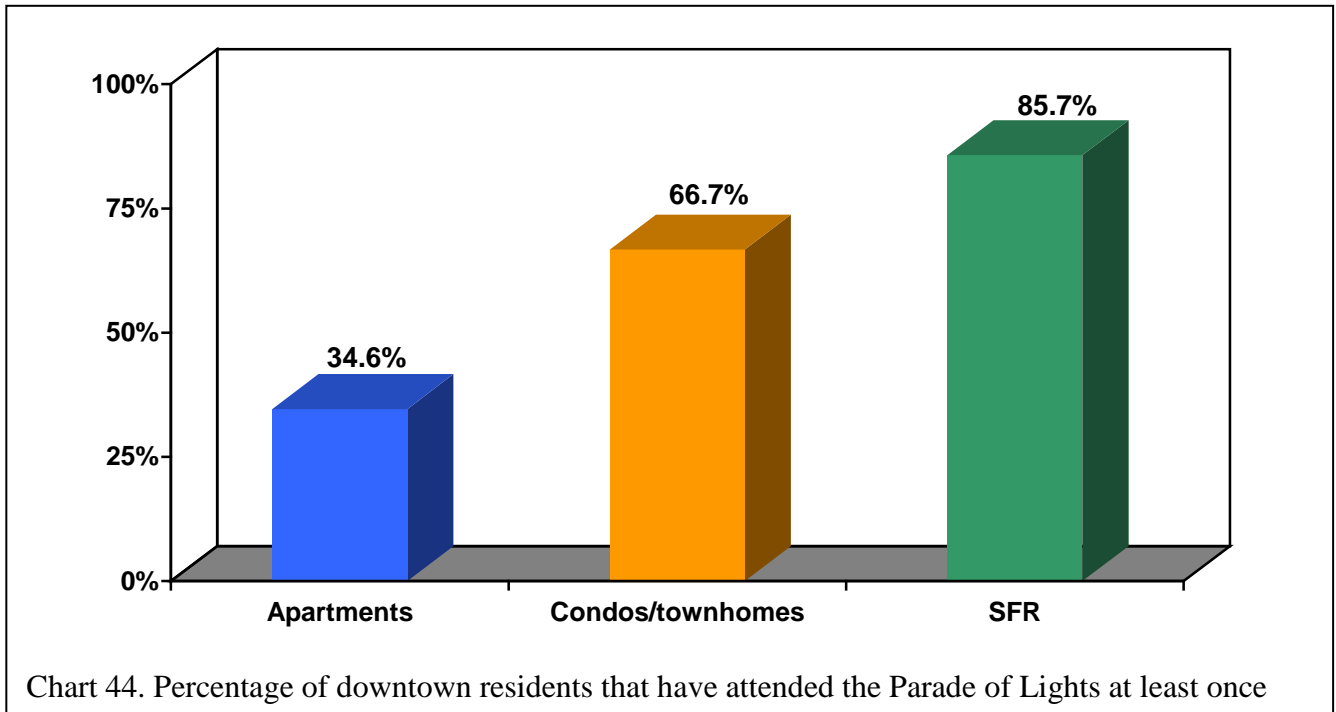
Most downtown residents have attended the MAIN ST. Fort Worth Arts Festival at least once (Chart 42).



# 10- Downtown events

## B- Parade of Lights

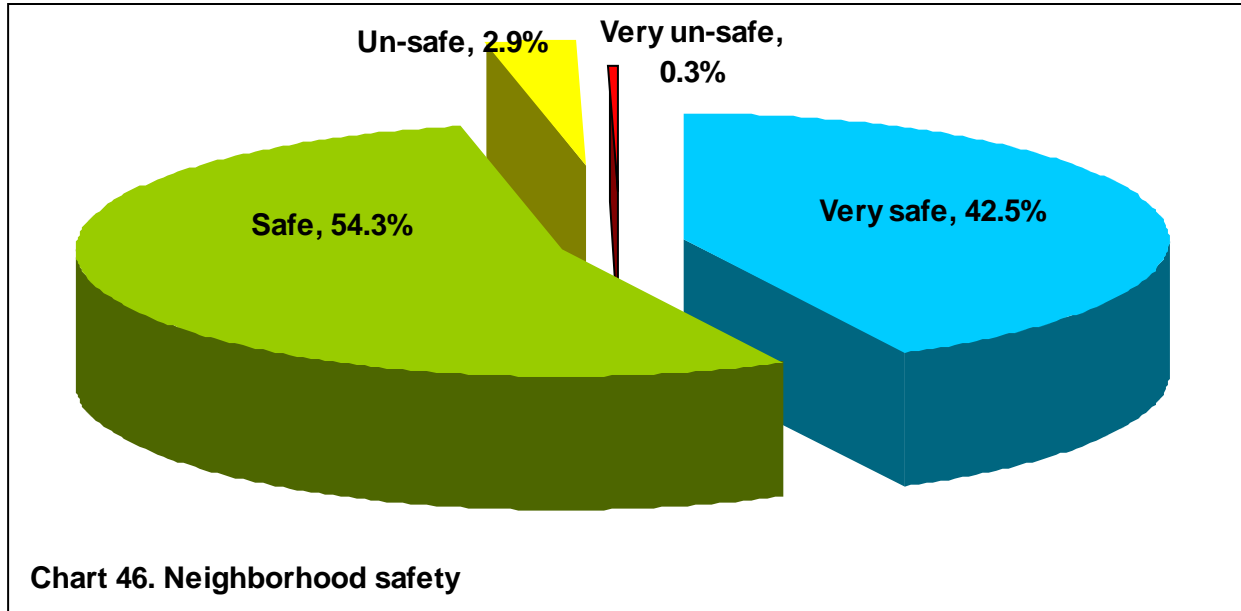
A Smaller percentage of downtown residents attend the Parade of Lights than the MAIN ST. Fort Worth Arts Festival (81.3% vs. 51.8% respectively, Chart 44).



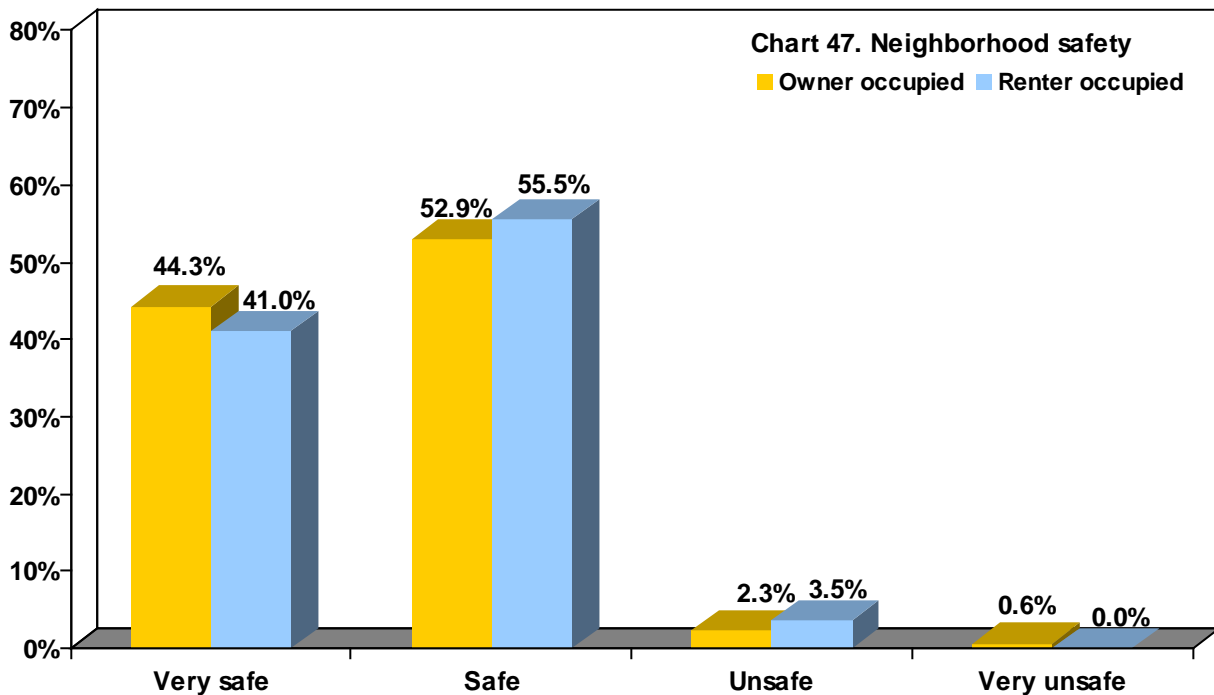
# 11- Opinions about neighborhood

## a- Safety

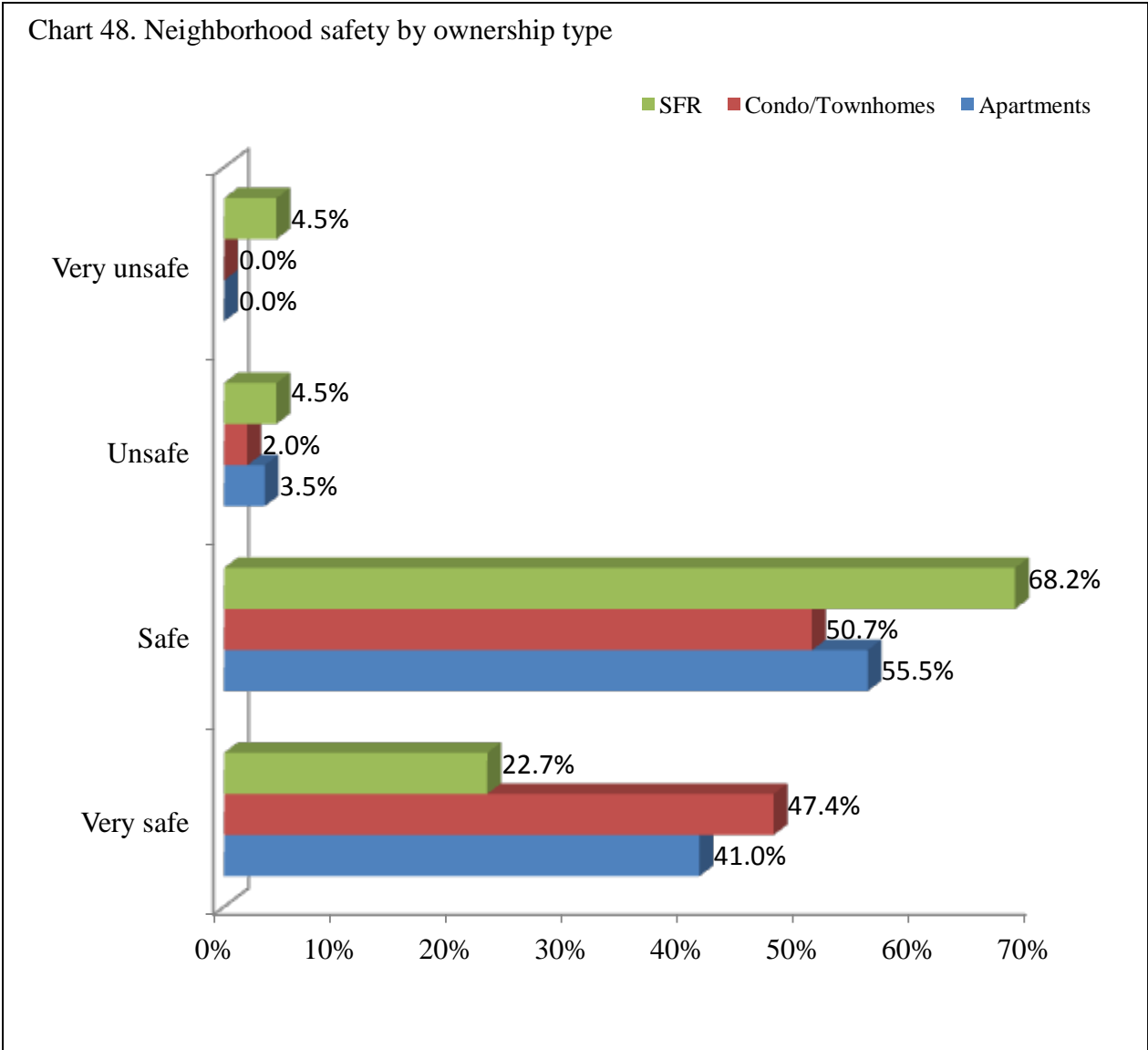
The majority (54.3%) of downtown residents ranked their neighborhoods as safe (Chart 46). 42.5% ranked them very safe and 2.9% ranked them as unsafe and 0.3% as very un-safe.



No significant gap was observed in perception of neighborhood safety between owner occupied and renter occupied units (Chart 47).



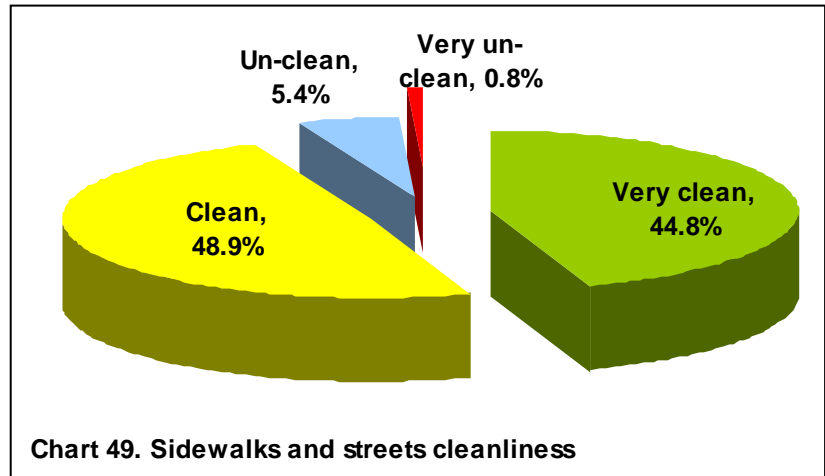
More condo/townhome owners than apartment renters or SFR owners ranked their neighborhood as very safe (47.4%, 41.0% and 22.7% respectively, Chart 48). More SFR owners than condo/townhome owners or apartment renters ranked their neighborhood as safe (68.2%, 50.7% and 55.5% respectively). A Very small percentage of residents ranked their neighborhood unsafe or very unsafe. More SFR owners than condo/townhome owners or apartment renters ranked their neighborhood unsafe or very unsafe, 4.5% in both groups.



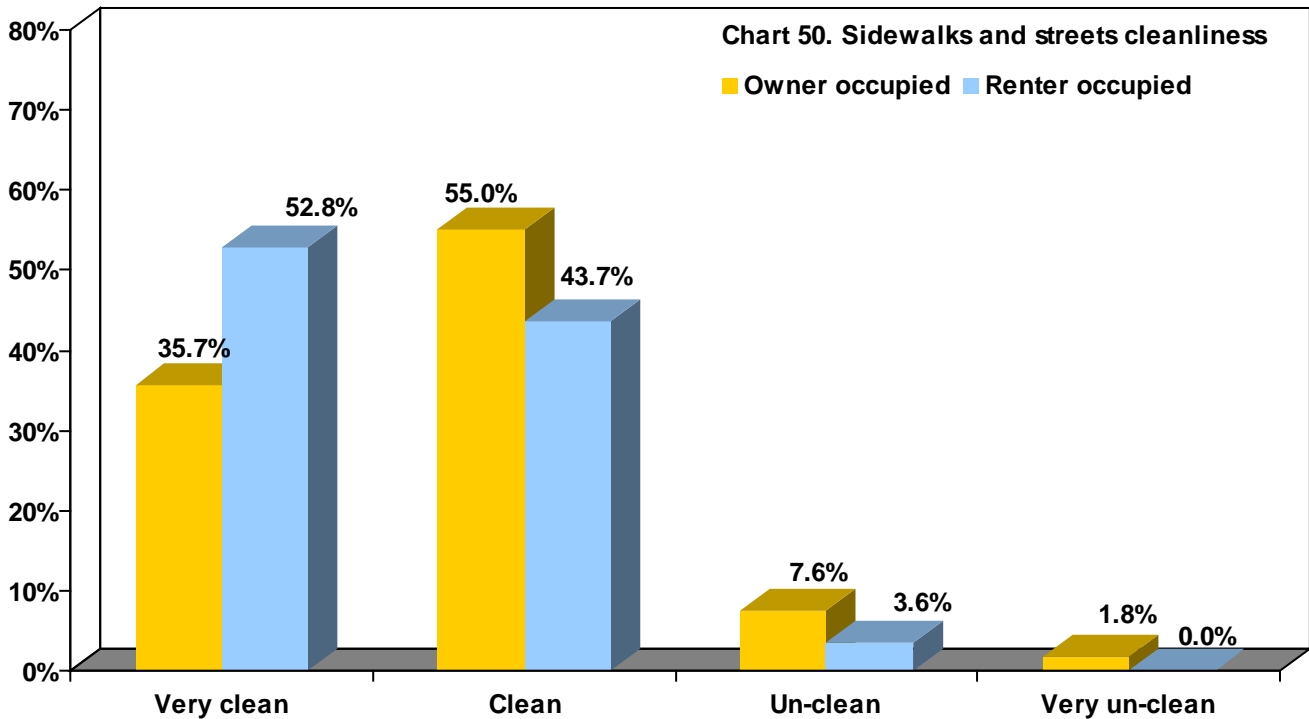
# 11- Opinions about neighborhood

## b- Cleanliness

A majority (93.8%) of downtown residents rated the sidewalks and streets clean or very clean (Chart 49). 44.8% rated them very clean, 5.4% rated unclean and 0.8% rated very unclean. Significantly larger percentage of renters than owners rated their streets and sidewalks as very clean (52.8% and 35.7% respectively, Chart 50).

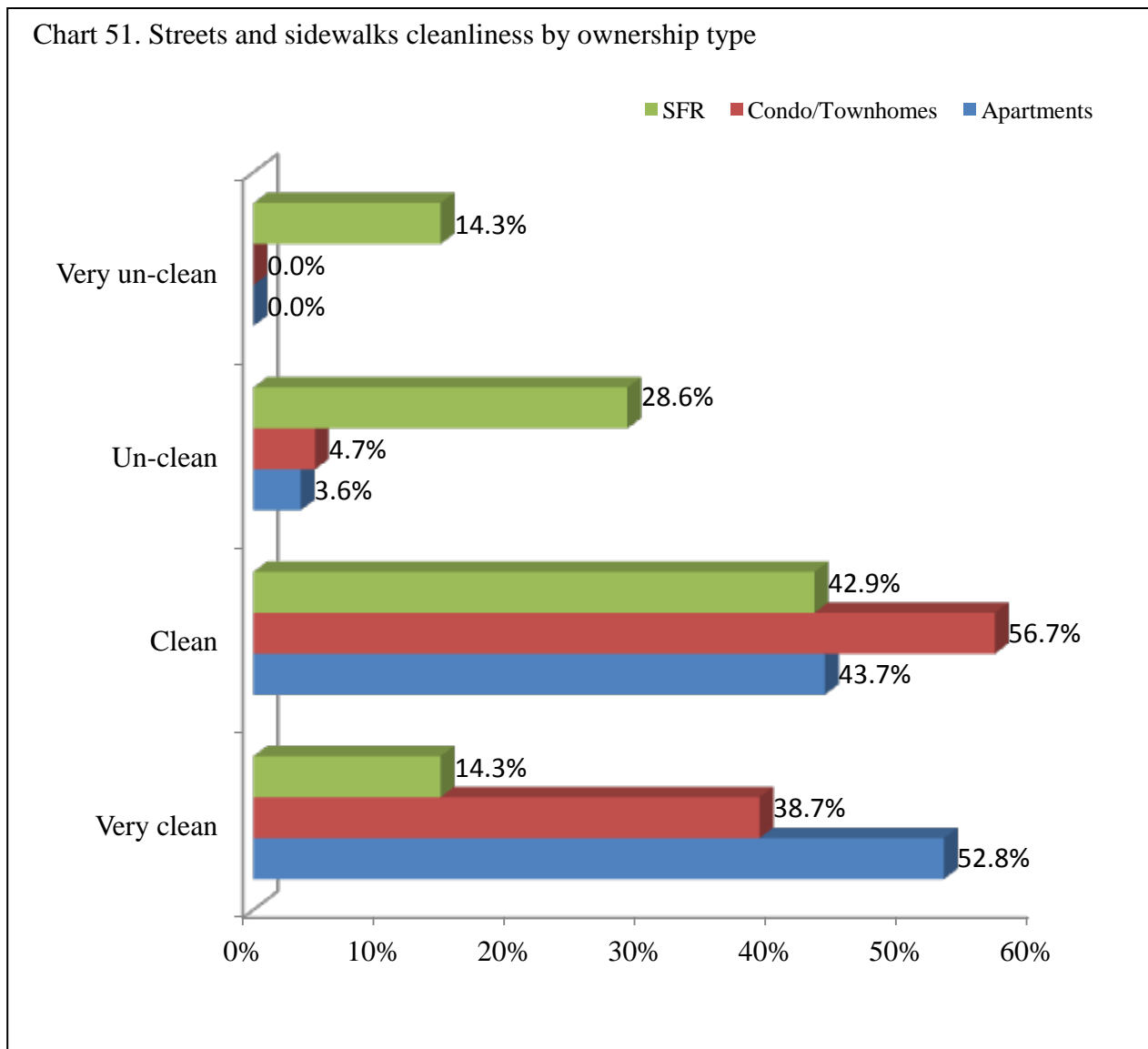


The opposite was observed with rating of “Clean”. A much larger percentage of homeowners than renters rated their neighborhoods’ sidewalks and street as clean (55.0% and 43.7% respectively, Chart 50). A small percentage of owners occupied (7.6%) and renter occupied (3.6%) residents rated the sidewalks and streets as unclean.



A much larger percentage of apartment renters than condo/townhome or SFR owners rated their streets and sidewalks as very clean (52.8%, 38.7% and 14.3% respectively, Chart 51).

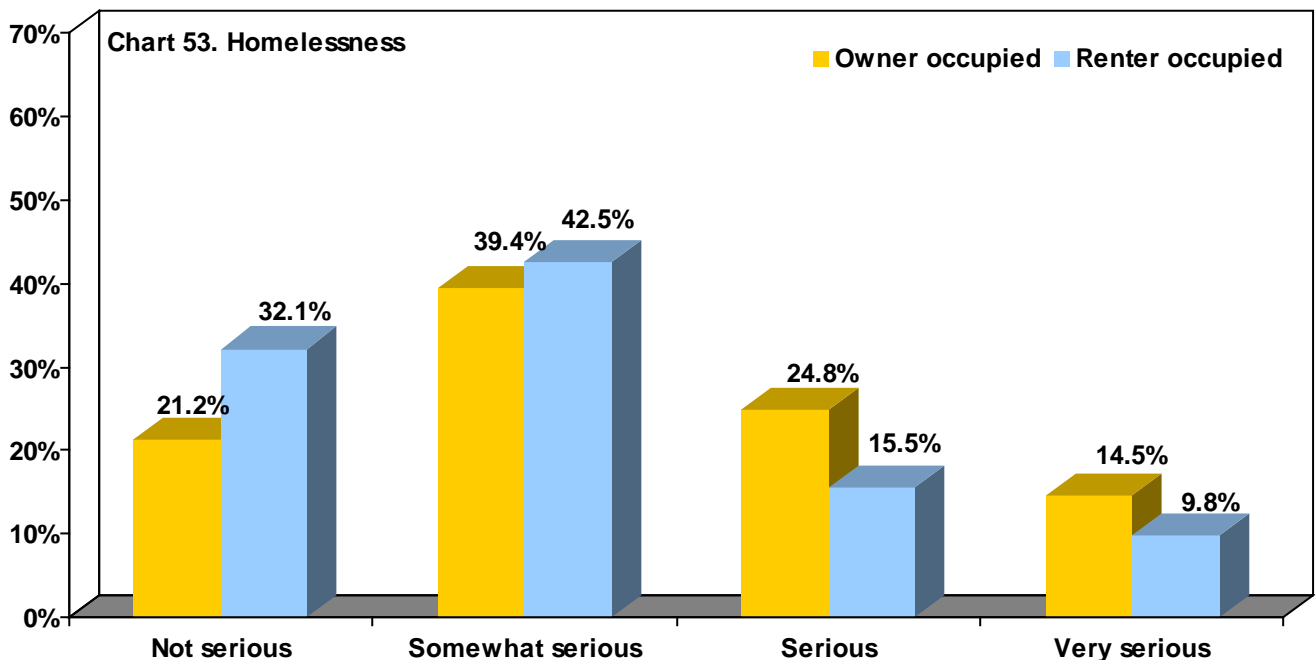
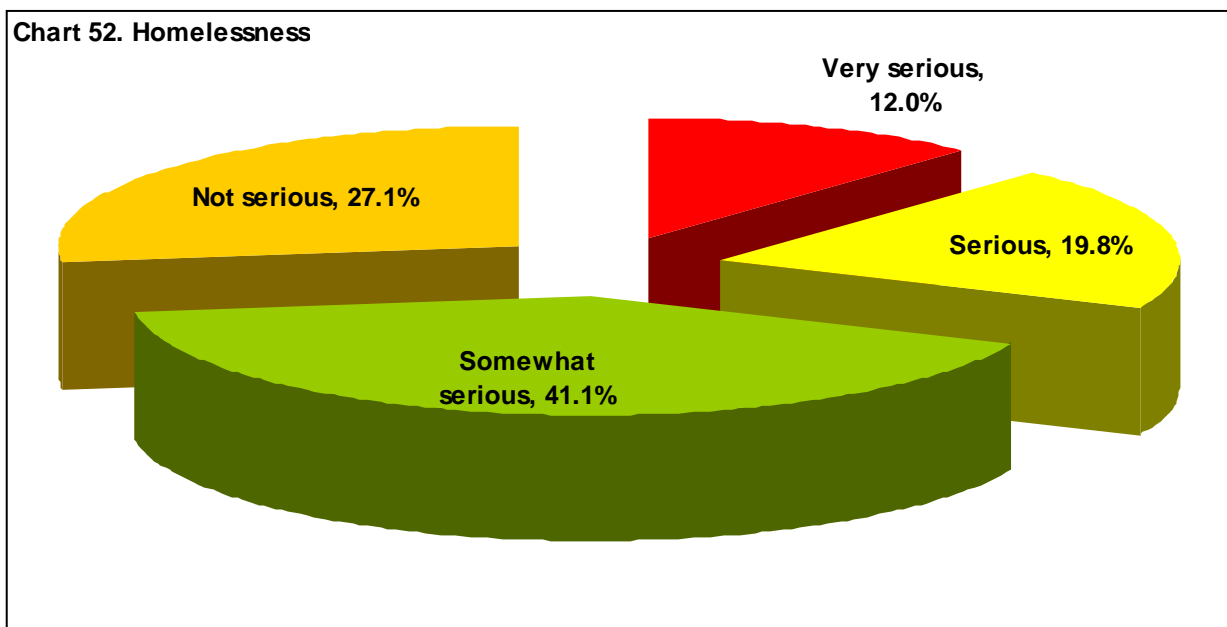
56.7% of condo/townhome owners rated their streets and sidewalks as clean compared to 43.7% for apartment renters and 42.9% for SFR owners. 42.9% of SFR owners rated the streets and sidewalks in their neighborhood as un-clean or very un-clean. It should be noted that all SFR units are located in the northern section of downtown which is undergoing a significant amount of construction activity.



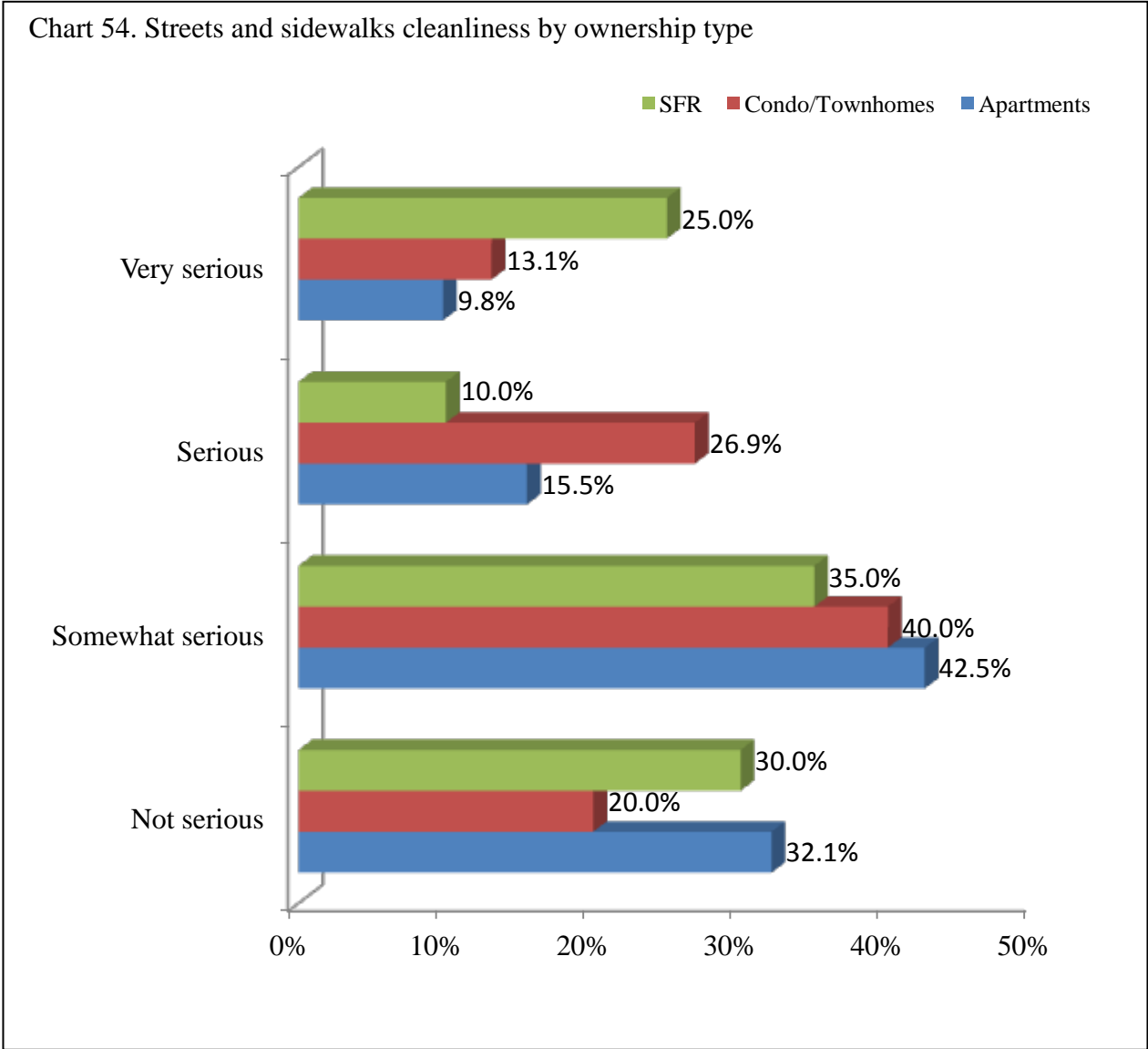
# 11- Opinions about neighborhood

## c- Homelessness

The homelessness problem in neighborhoods was rated not serious by 27.1% of downtown residents. 41.1% rated it as somewhat serious and 19.8% serious and 12.0% very serious (Chart 52). The homelessness problem was rated not serious by more renters than owners (32.1% and 21.2% respectively), chart 53. Similarly, more renters than owners rated it somewhat serious (42.5% and 39.4% respectively). A higher percentage of homeowners than renters rated it as very serious (14.5% and 9.8% respectively).



A higher percentage of apartment renters than condo/townhome and SFR owners rated homelessness as not serious (32.1%, 20% and 30.0% respectively, Chart 54). Fewer apartment renters than condo/townhome and SFR owners rated it as a very serious problem (9.8%, 13.1% and 25.0% respectively). Overall, 74.6% of apartment renters, 60.0% of condo/townhome owners and 65.0% of SFR owners rated the homelessness in their neighborhood as somewhat or not serious a problem.



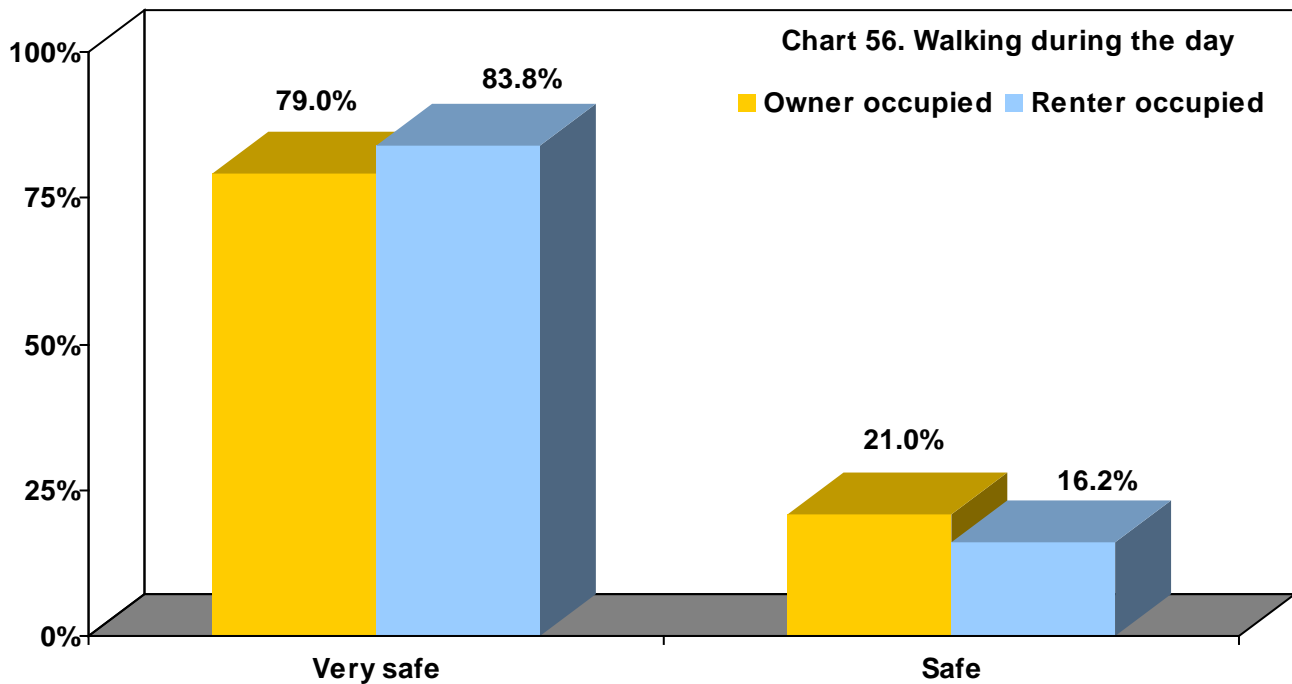
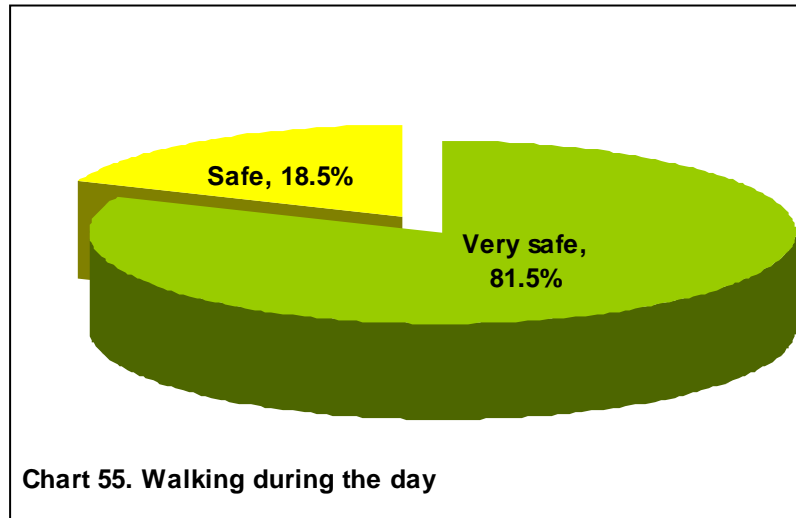
## 12- Walking in downtown

### a- During the day

The majority (81.5%) of residents feels very safe walking during the day in downtown (Chart 55).

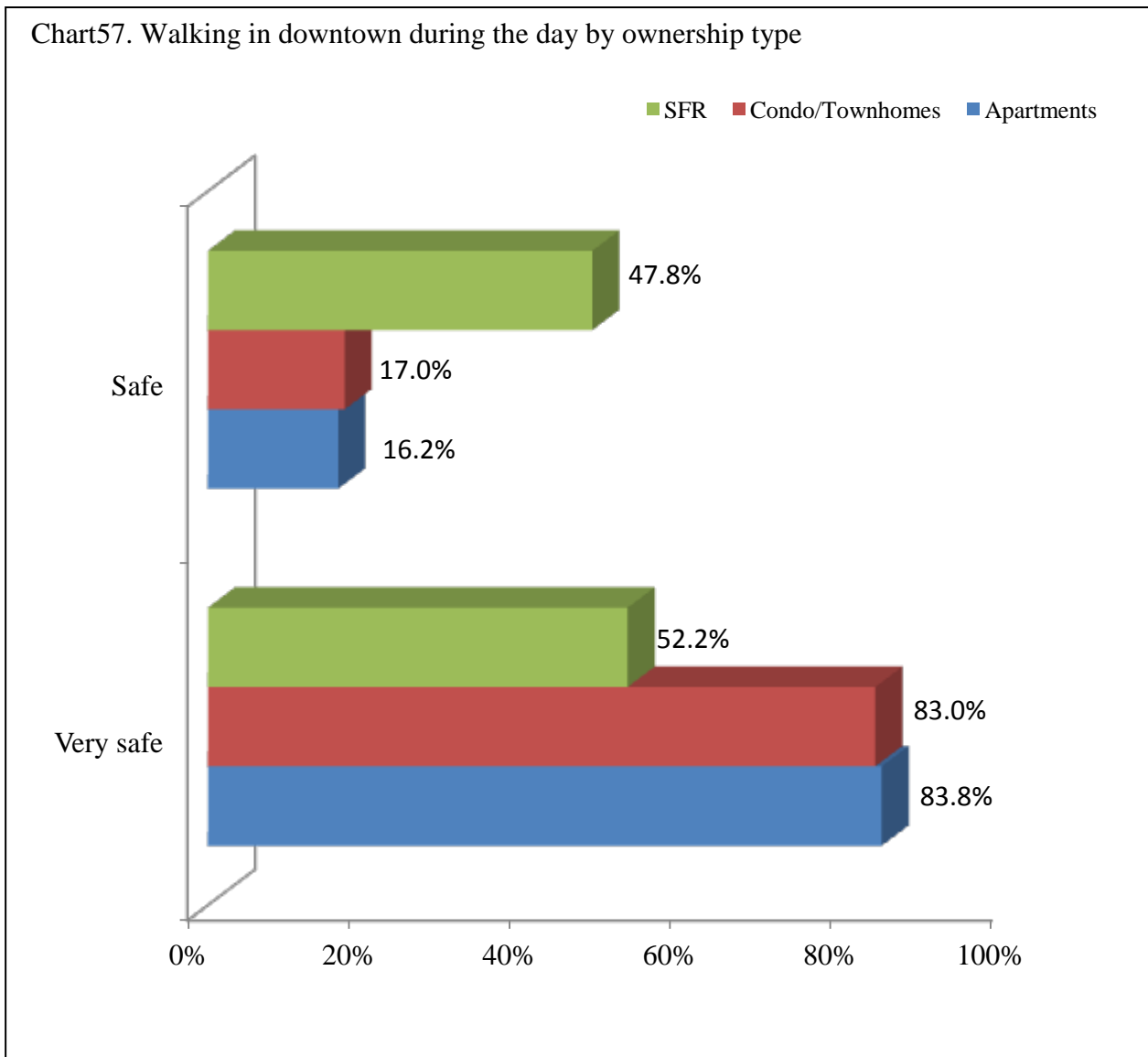
18.5% feel safe. No respondent rated it un-safe or very un-safe.

More residents of renter occupied units than owner occupied rated it very safe (83.8 and 79.0% respectively, Chart 56).



Very high percentage of apartment renters and condo/townhome owners rated walking in downtown during the day as very safe (83.8% and 83.0% respectively). 52.2% of SFR owners rated it very safe (Chart 57).

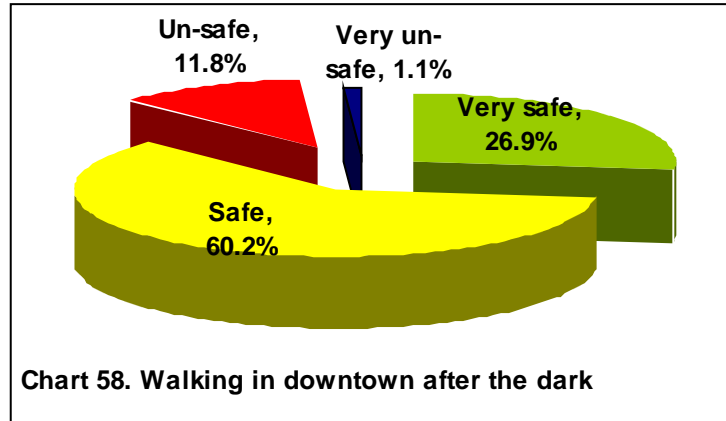
None of the respondent in any group rated it un-safe or very un-safe.



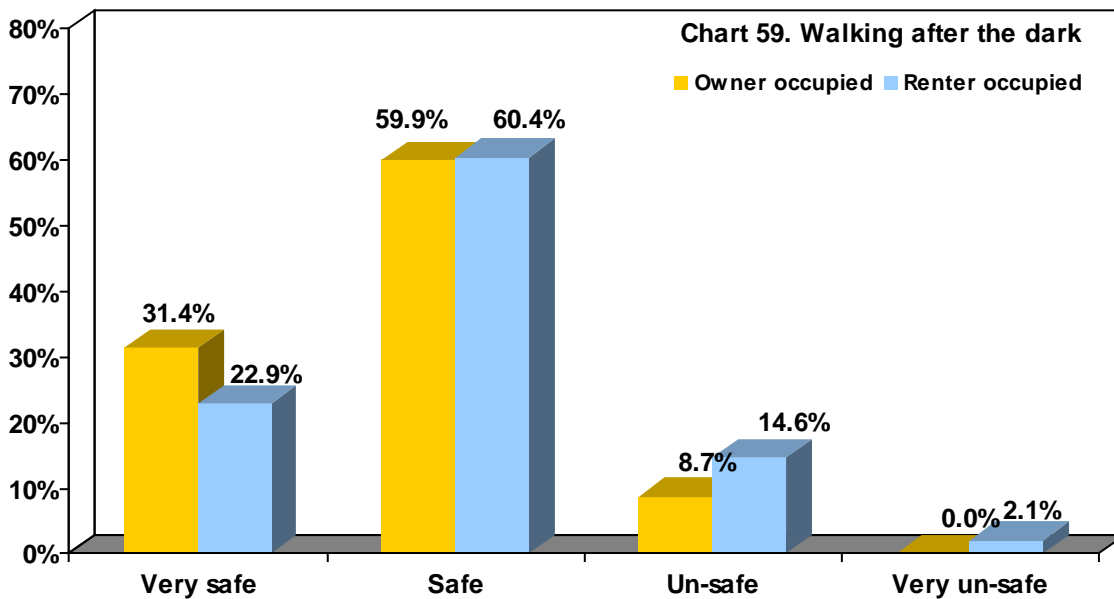
## 12- Walking in downtown

### b- After dark

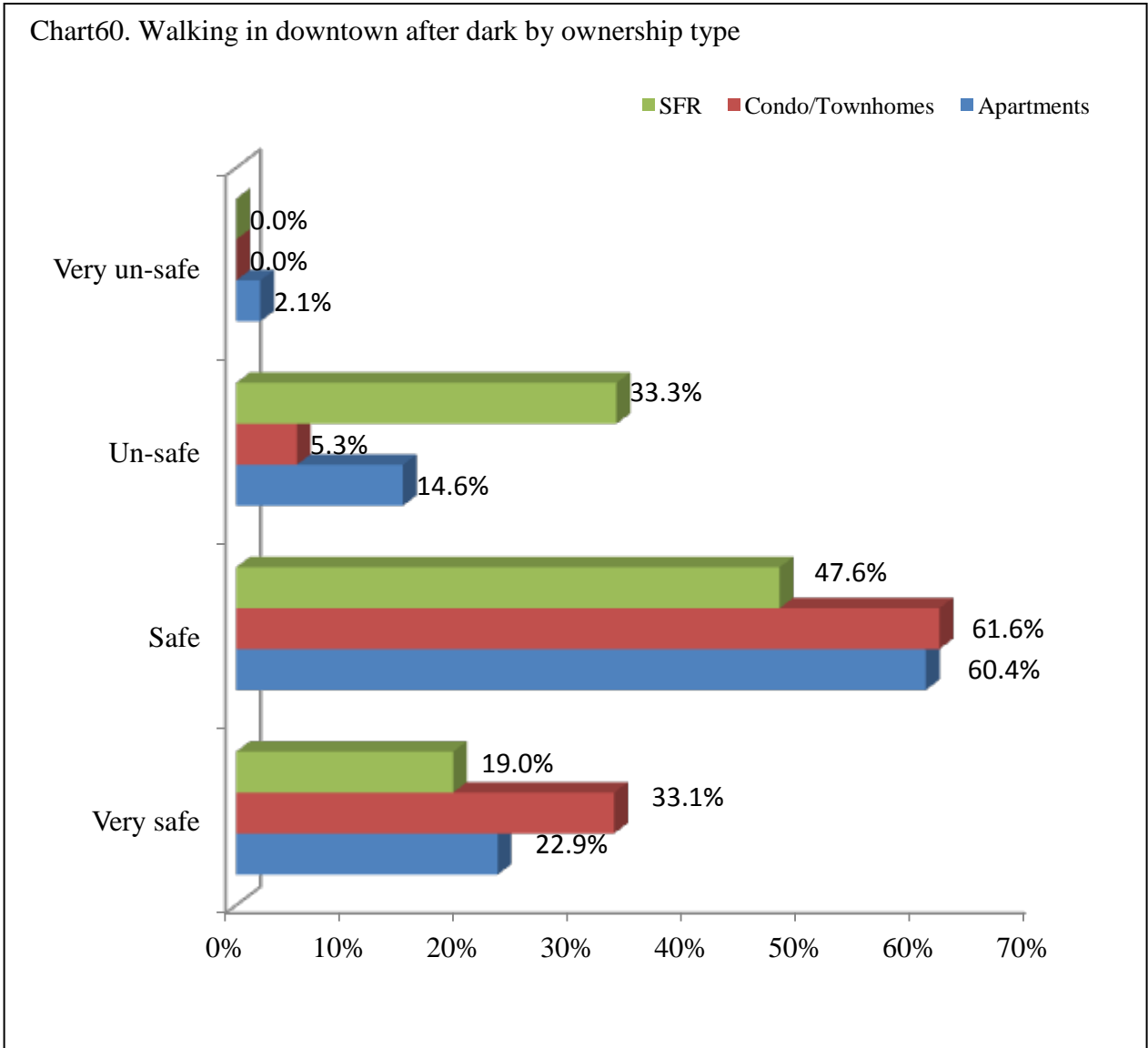
The majority (60.2%) of residents feel safe to walk after dark in downtown. 26.9% feel very safe, 11.8% feel unsafe and 1.1% reported it as very un-safe (Chart 58).



More owners (31.4%) than renters (22.9%) feel very safe walking after dark in downtown (chart 59). 59.9% of owners and 60.4% of renters feel safe walking after dark in downtown. More renters (14.6%) than owners (8.7%) feel un-safe to walk in downtown after dark. Few feel very un-safe.



More condo/townhome owners than apartment renters and SFR owners reported it is very safe to walk in downtown after dark (33.1%, 22.9% and 19% respectively, Chart 60). A similar pattern was observed for those who reported it safe to walk in downtown after dark with condo/townhome owners at 61.6%, apartment renters at 60.4% and SFR owners at 47.6%. More SFR owners than apartment renter or condo/townhome owners reported it un-safe to walk in downtown after dark (33.3%, 14.6% and 5.3% respectively). 2.1% of apartment renters feel it is very un-safe to walk in downtown after dark; no other respondents rated it very un-safe.



# 13- Likes & Dislikes

Respondents were asked to list the top 3 characteristics they like best and least about downtown.

Key words were selected from comments and top tier findings are presented in charts 61 – 66.

