



**Employee Survey
Downtown Fort Worth
July 2008**

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Director of Research**

Survey Sponsors

Downtown Fort Worth Inc.

Role: Survey design, management of data collection and statistical analysis



The University of Texas at Arlington

School of Urban and Public Affairs
City and Regional Planning, CIRP 5333
Graduate students

Role: Survey design, interviews and data entry



Fort Worth Transportation Authority

Role: Survey design, \$2 Subway Sandwich Shop coupons and free one day bus passes for respondents



Background

In July 2008, Downtown Fort Worth, Inc. in cooperation with the Fort Worth Transportation Authority and the University of Texas at Arlington, undertook a survey of downtown employees to establish a general demographic profile and determine their interest in public transportation, downtown housing, and desirability of retail stores.

The survey was designed jointly by Downtown Fort Worth, Inc., the Fort Worth Transportation Authority and graduate students enrolled in course CIRP 5333 in the School of Urban and Public Affairs at The University of Texas at Arlington. The survey was one page and consisted of 40 questions. The graduate students were stationed at 76 intercept locations throughout downtown. These consisted of 40 Class A, B and C office buildings and 36 non-office locations including retail shops, restaurants, hotels, bars and other establishments.

Office intercept interviews were conducted between the hours of 11:00 AM and 2:00 PM on weekdays. Non-office intercept interviews were conducted at off-peak hours. All respondents were selected on a random basis. A total of 382 valid surveys (302 office and 80 non-office employees) were collected during a 2-week period. This provided a $\pm 5\%$ margin of error at a 95% confidence level. The number of employees surveyed per intercept location was proportional to the respective intercept's share of total downtown employees (i.e., an office with 10% share of downtown employees contributed 38 surveys, or 10% of 382).

A \$2 coupon good for the Subway Sandwich Shop and a one day free bus pass were given to each respondent who completed the survey. These costs were underwritten by the Fort Worth Transportation Authority.

DFWI believes this research will prove interesting to potential employers 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 and employees. The employee survey supports DFWI's efforts to improve our downtown for all stakeholders.

Executive Summary

In July 2008, 382 employees in downtown Fort Worth were asked to fill out a one page questionnaire. Seventy six intercept locations were selected in downtown to conduct the survey (40 offices and 36 non-office locations). The number of employees surveyed per intercept location was proportional to the respective intercept's share of total downtown employees—for example, an office with a 10% share of downtown employees contributed 38 surveys.

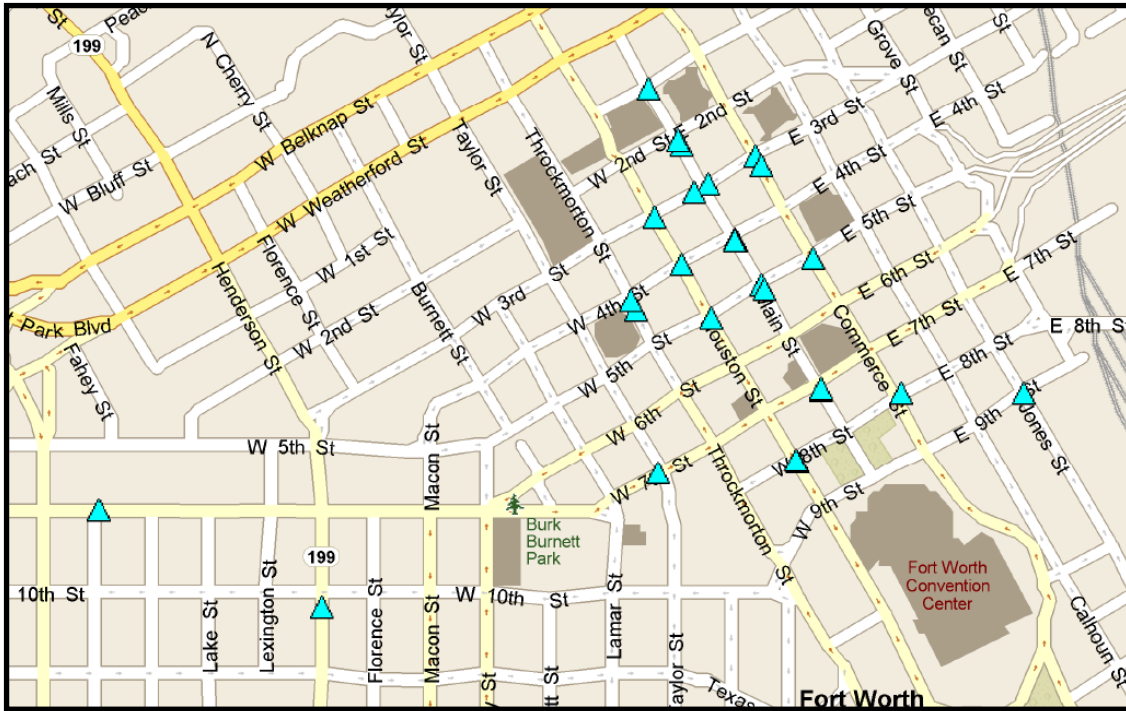
Graduate students from the School of Urban and Public Affairs at The University of Texas at Arlington conducted the survey between 11:00AM and 2:00 PM for office workers and at off-peak hours for non-office workers. A \$2 Subway Sandwich Shop coupon and a free one day bus pass were given as incentives to each respondent. All incentives were provided by the Fort Worth Transportation Authority.

Findings from the survey include:

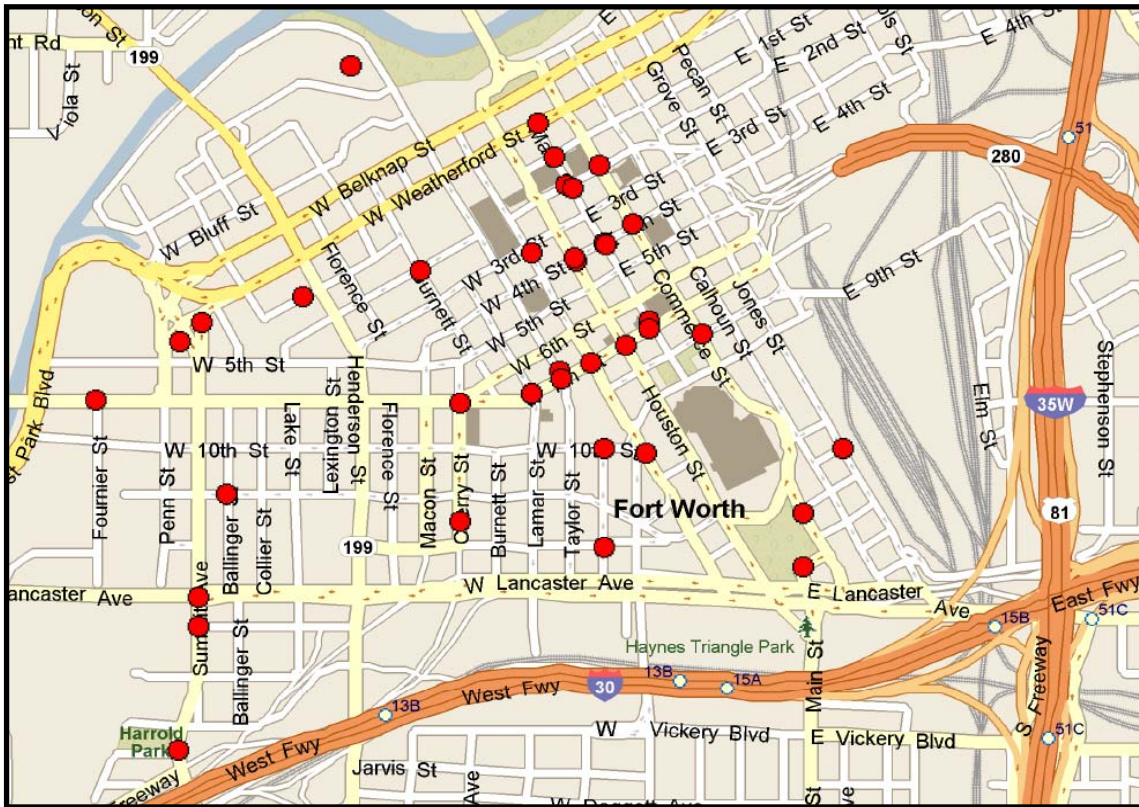
- 46.2% of downtown Fort Worth employees are under the age of 34.
- 51.9% of employees are married and 54.6% have households with no children.
- 62.5% of employees do not think that there is a need for any childcare program in downtown. 19.5% would like to see additional full time childcare.
- 36.6% of employees indicated a bachelor's degree as highest attained, 9.2% a master's and 5.1% a doctoral degree.
- The length of tenure at current residence is 3 years or less for 46.1% of employees.
- 33.1% of employees expressed interest in living downtown.
- 43.1% of employees reported income of more than \$76,000 per year.
- 4.4% of downtown employees live in or near downtown, 51.8% in the city of Fort Worth, 43.3% in the DFW metro area, and 0.5% live out of the metro area of Dallas-Fort Worth.
- 43.8% of downtown employees have worked more than 4 years for the same employer.
- A private car is used by 85.8% of employees to commute; carpool, 5.8%; bus, 2.6% and 2.1% walk.
- 63.1% of employees have never used public transportation to and from downtown Fort Worth.
- 59.1% of employees are not aware of free public transportation in downtown Fort Worth.
- Desirability of clothing or department stores in downtown was ranked as high or very high by 40.9% of employees.

- Stores such as Gap and Macy's were mentioned 51.3% by employees.
- Desirability of a grocery store in downtown was ranked high or very high by 44.8% of employees.
- Conventional grocery stores were named by 41.2% and Central Market/Whole Foods by 33.3% of respondents.
- Desirability of specialty stores in downtown was ranked high or very high by 37.1% of employees.
- Walking during the day in downtown was ranked safe or very safe by 98.1% of employees.
- Walking after dark in downtown was ranked safe or very safe by 85.9% of employees.
- Sidewalks and streets were ranked clean or very clean by 94.3% of employees.
- Homelessness was ranked as not serious by 27.7%; somewhat serious by 43.7% of employees. 16.7% of employees thought it is a very serious problem in downtown Fort Worth.

Non-Office Intercept Locations

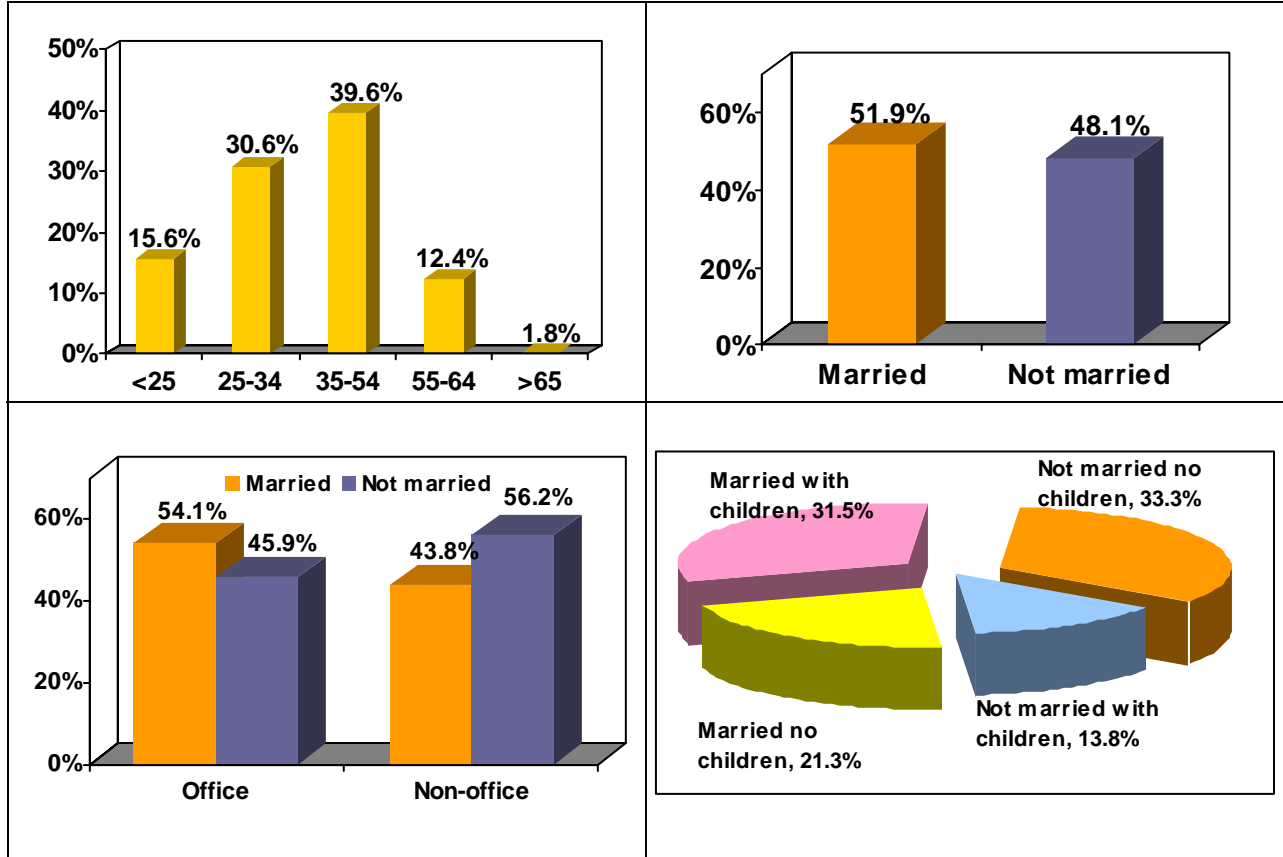


Office Intercept locations

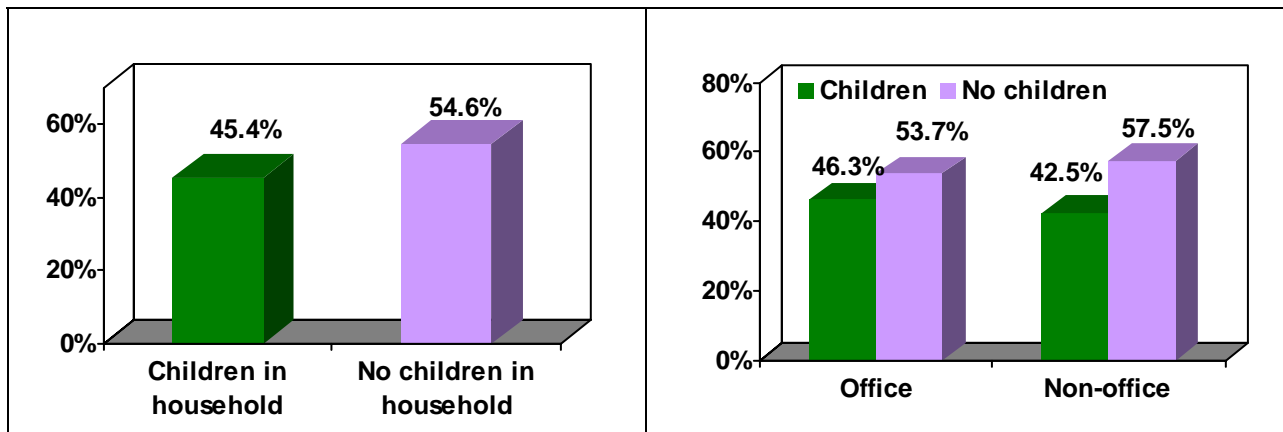


Age and family status

46.2% of downtown Fort Worth employees are under the age of 34. 51.9% are married and 54.6% of employees have households with no children.

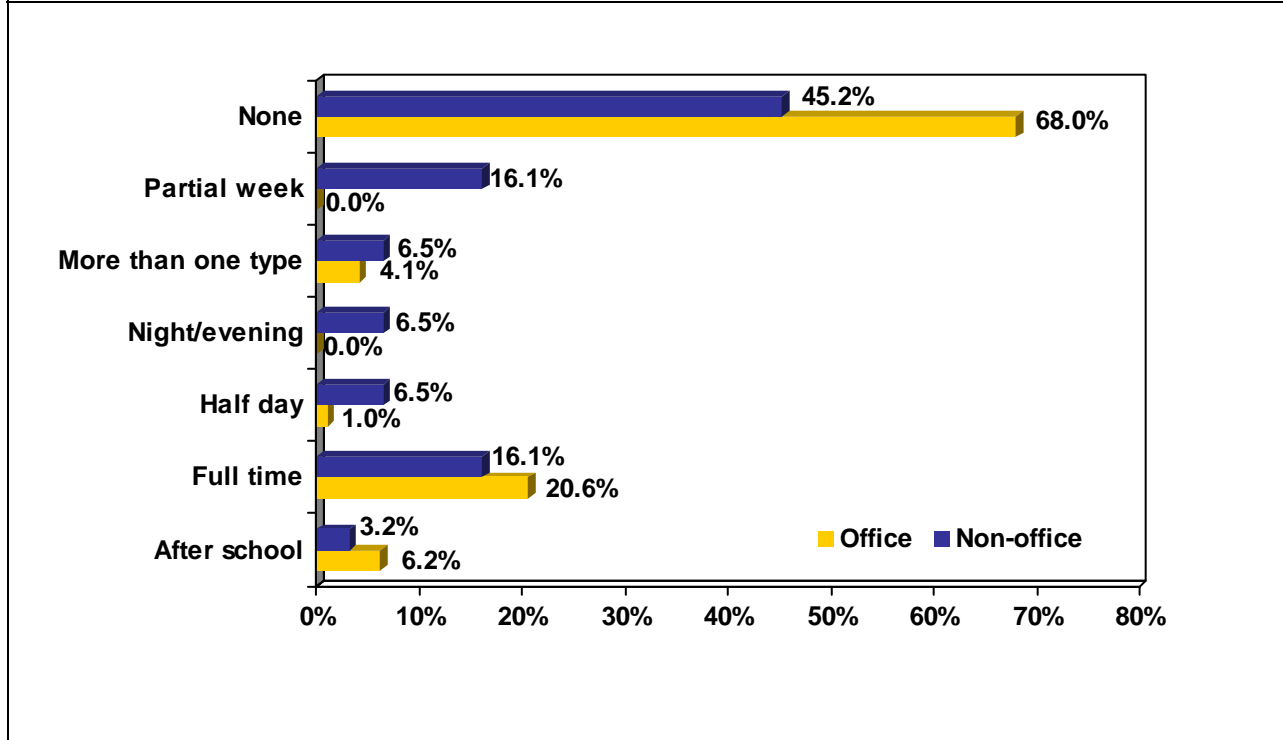
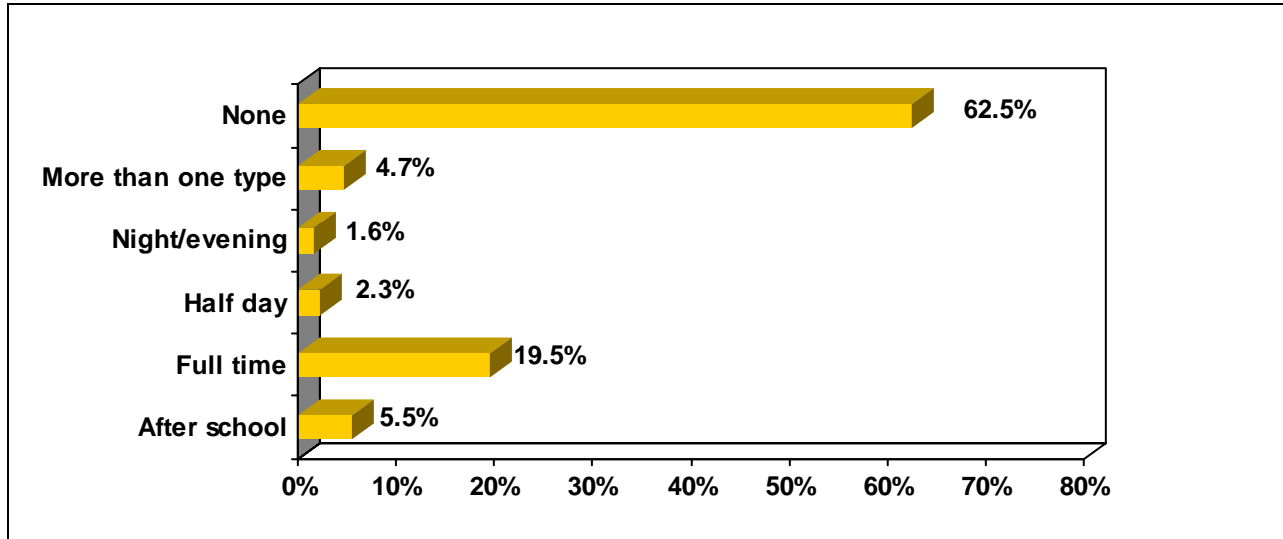


45.4% of downtown employees have children in their households. More office workers than non-office workers have children in their households (46.3% and 42.5% respectively).



62.5% of employees do not think that there is a need for any childcare program in downtown.

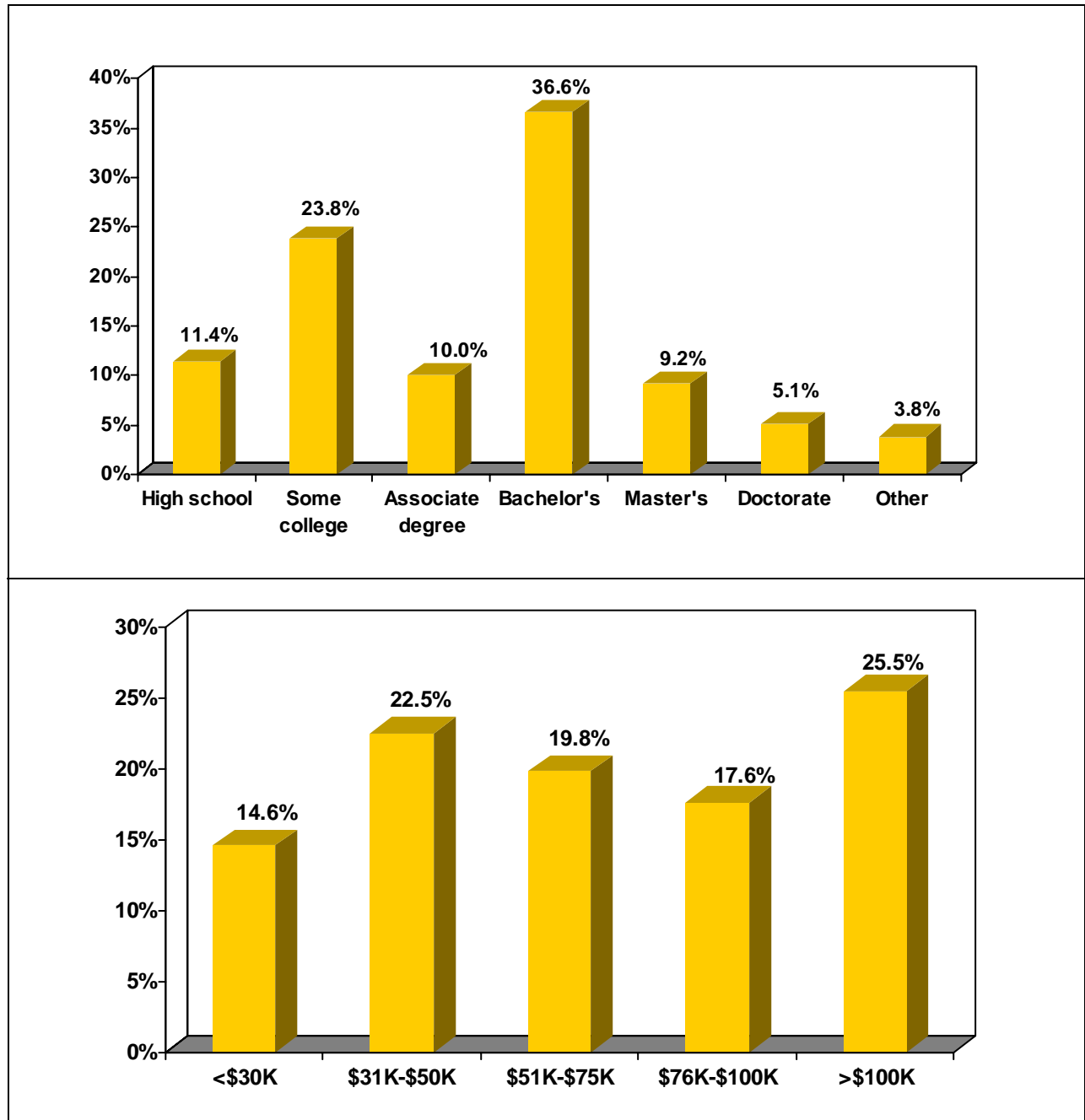
19.5% would like to see additional full time establishments in downtown.



Educational attainment and household income

36.6% of employees marked a bachelor's degree as highest attained, 9.2% a master's and 5.1% a doctoral degree.

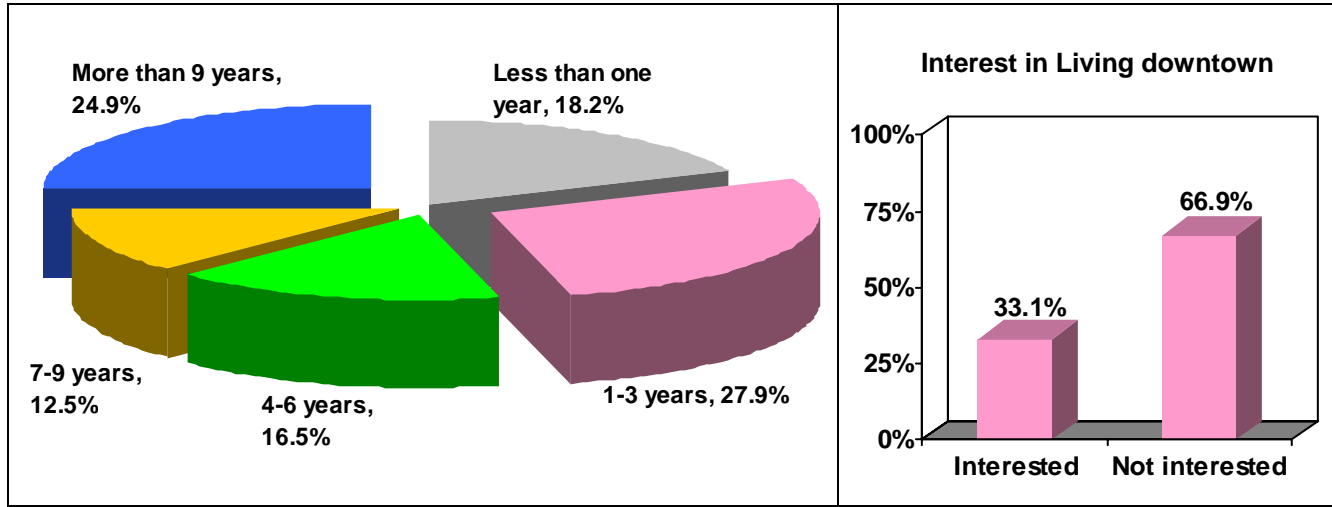
43.1% of employees reported household income of more than \$76,000 per year.



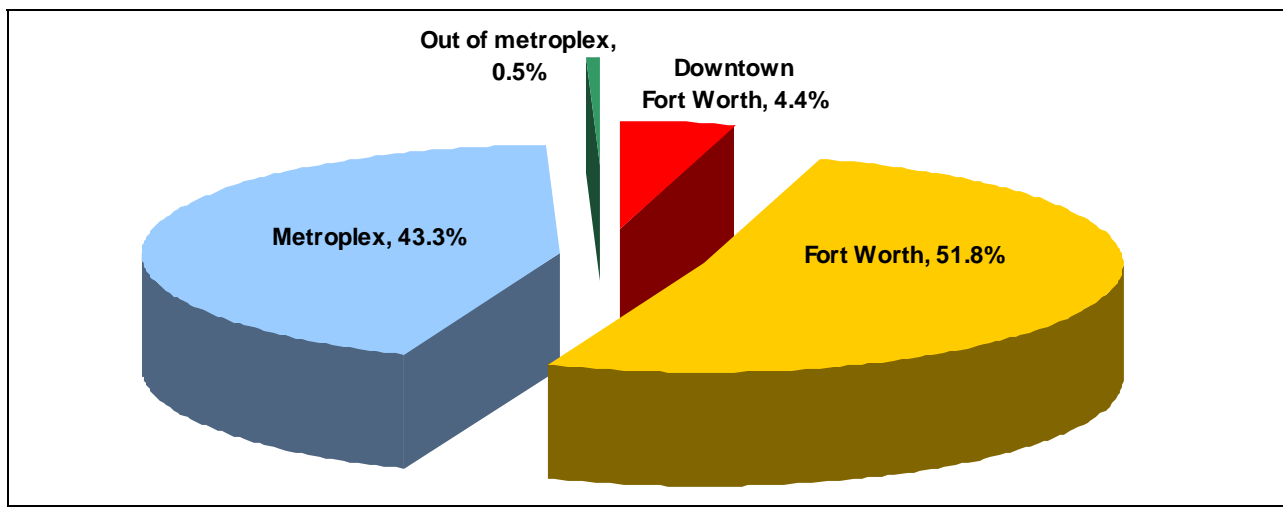
Tenure at and location of residence

The time at current residence is 3 years or less for 46.1% of employees.

33.1% of employees expressed interest in living downtown.



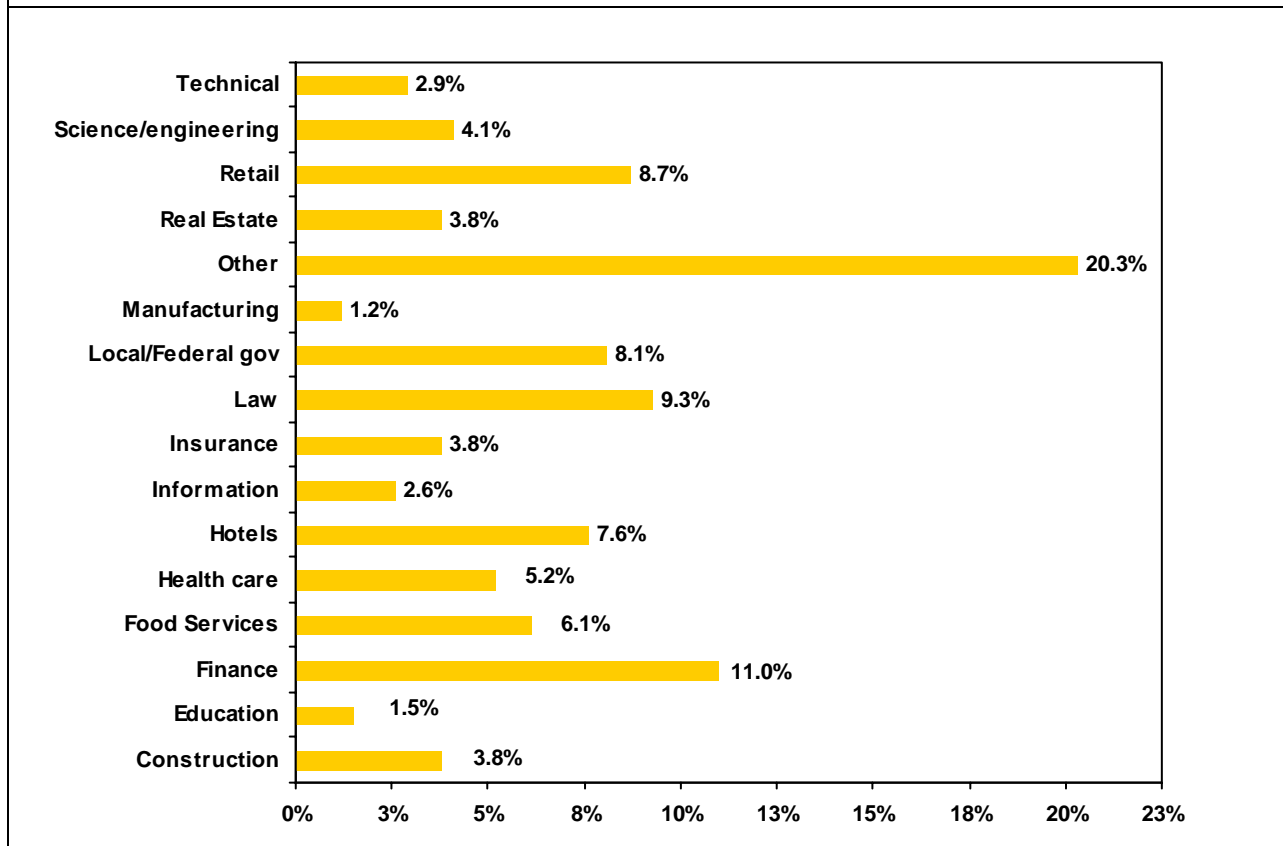
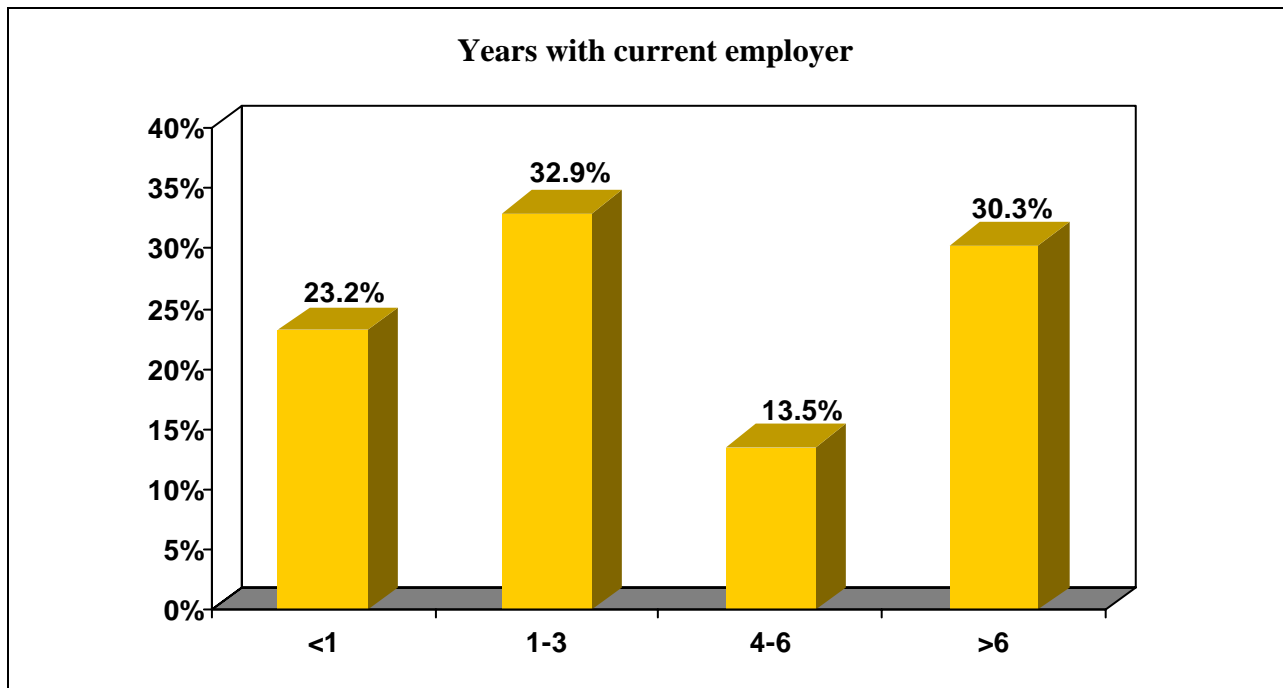
4.4% of downtown employees live in or near downtown, 51.8% in the city of Fort Worth, 43.3% in the DFW metro area, and 0.5% live outside of the metro area of Dallas/Fort Worth.



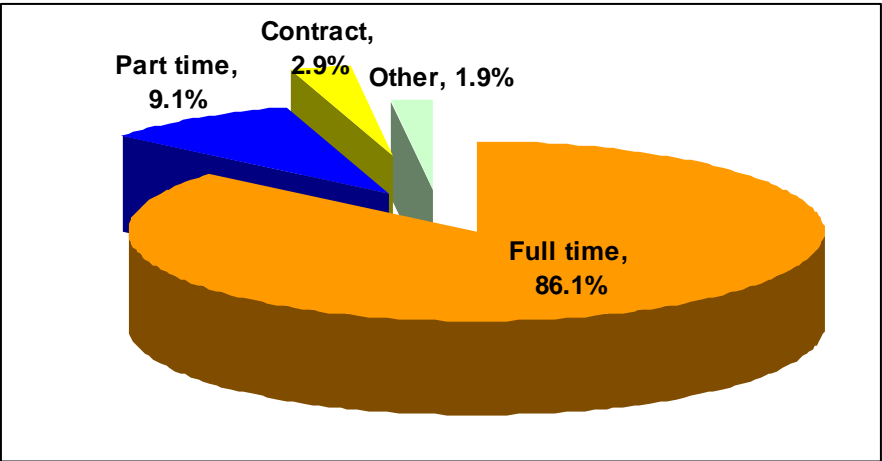
Employment

43.8% of downtown employees have worked more than 4 years for the same employer.

11% work in finance, 9.3% in law, 8.7% in retail, and 7% in technical/science and engineering related industries.



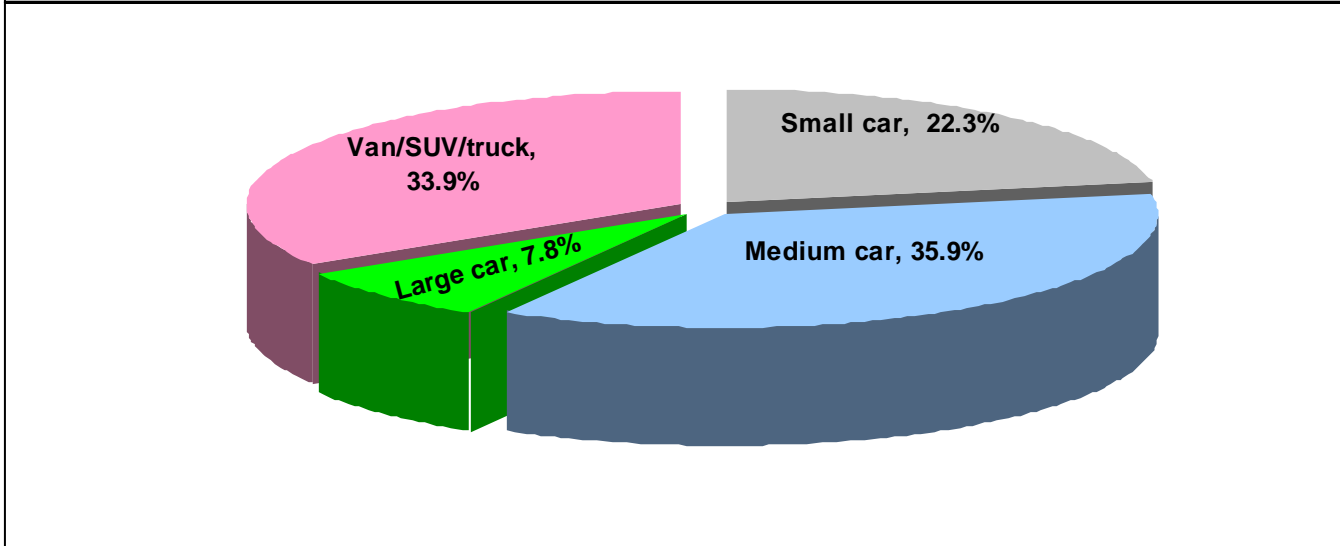
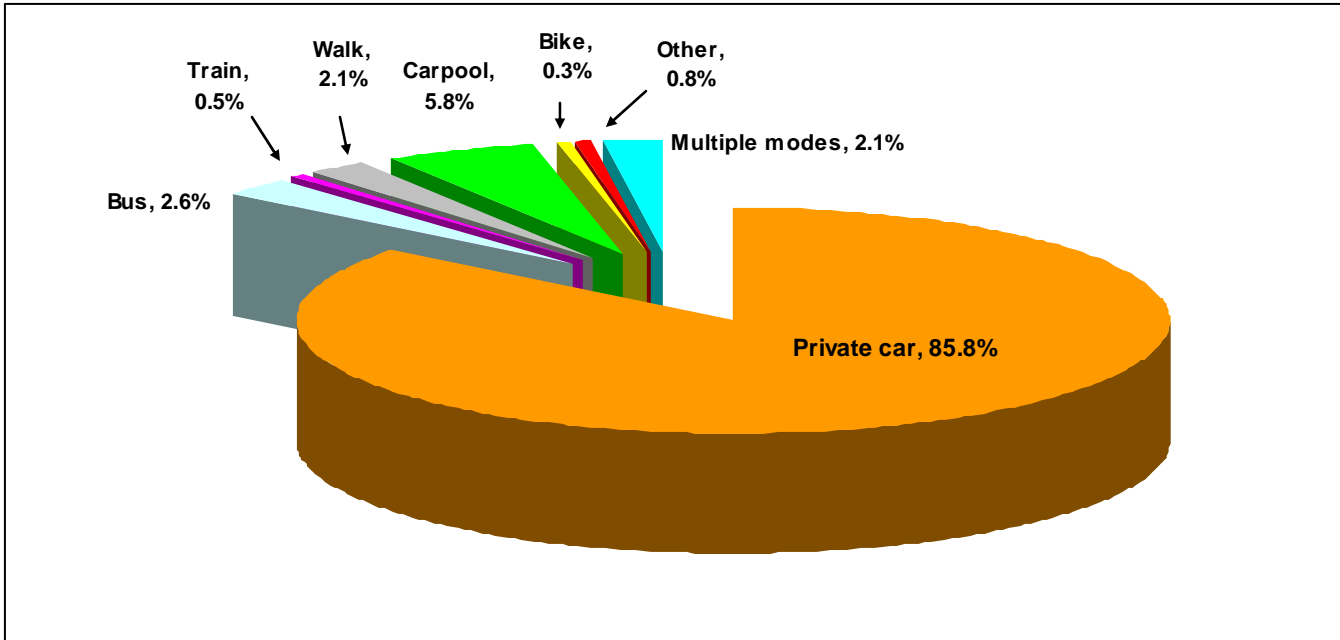
86.1% of downtown employees are employed full-time, 9.1% are part-time and 2.9% are contract employees.



Transportation

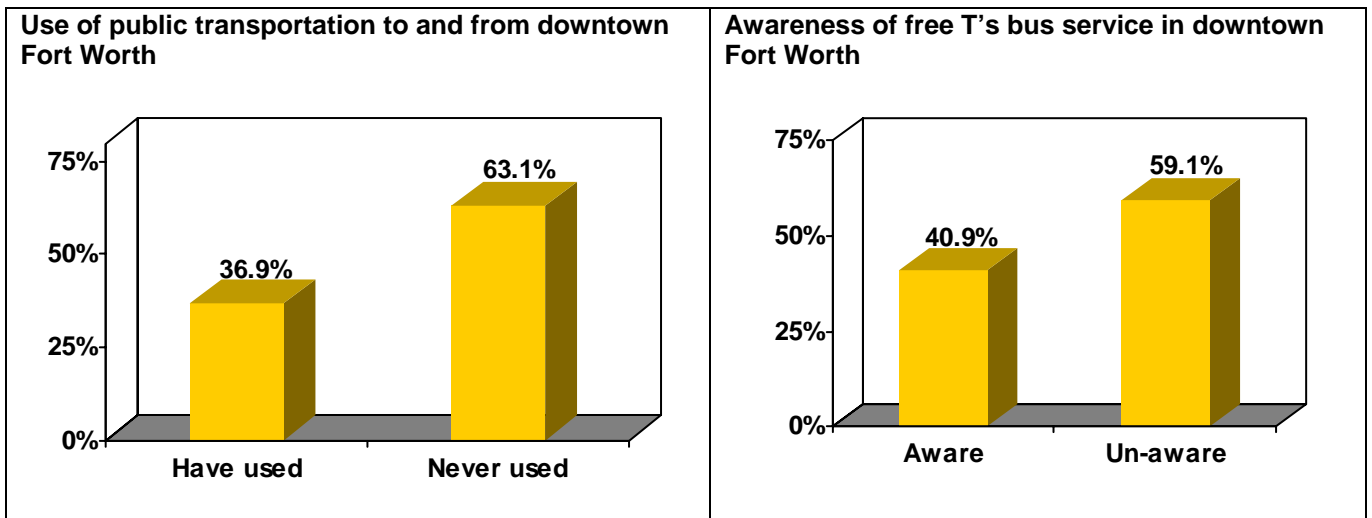
85.8% of downtown employees drive a car to work. 35.9% drive a medium size car, 33.9% a van/SUV/truck and 7.8% a large car.

Public transportation (bus and train) is used by 3.1% of employees to commute to work.



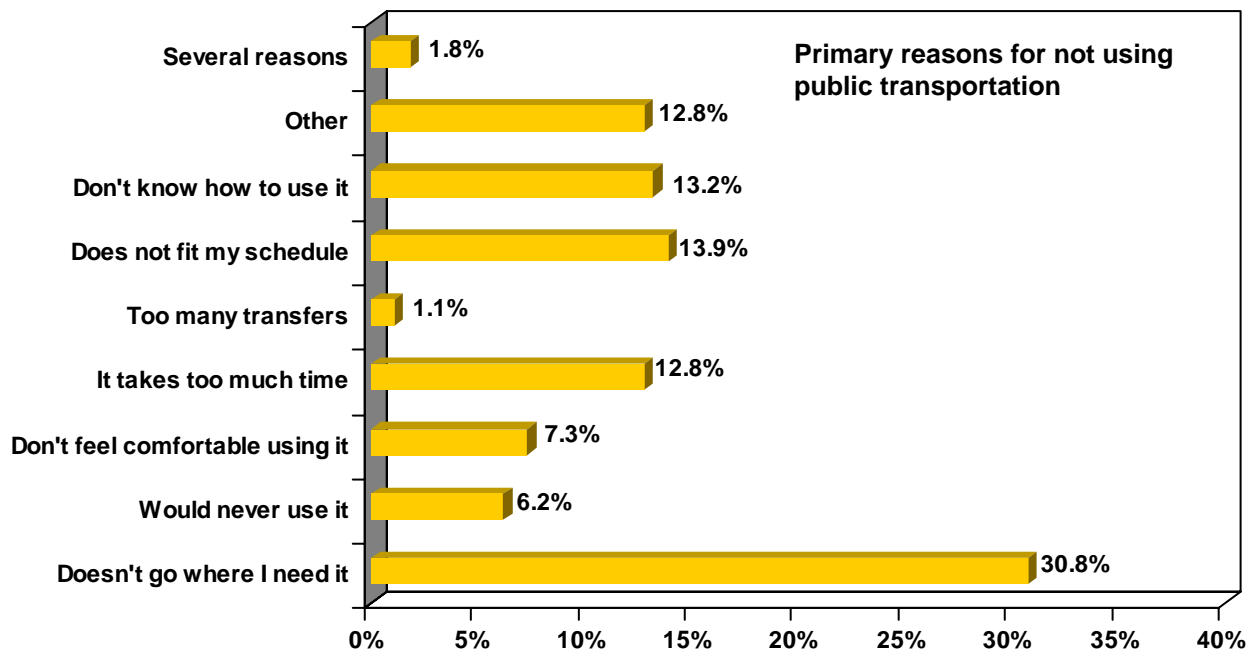
63.1% of downtown employees have never used public transportation to and from downtown Fort Worth. 59.1% are unaware that the T's bus service is free if used within the downtown business district.

Mean commute time to work is 25.6 minutes and mean commute to home is 27.9 minutes for downtown employees.



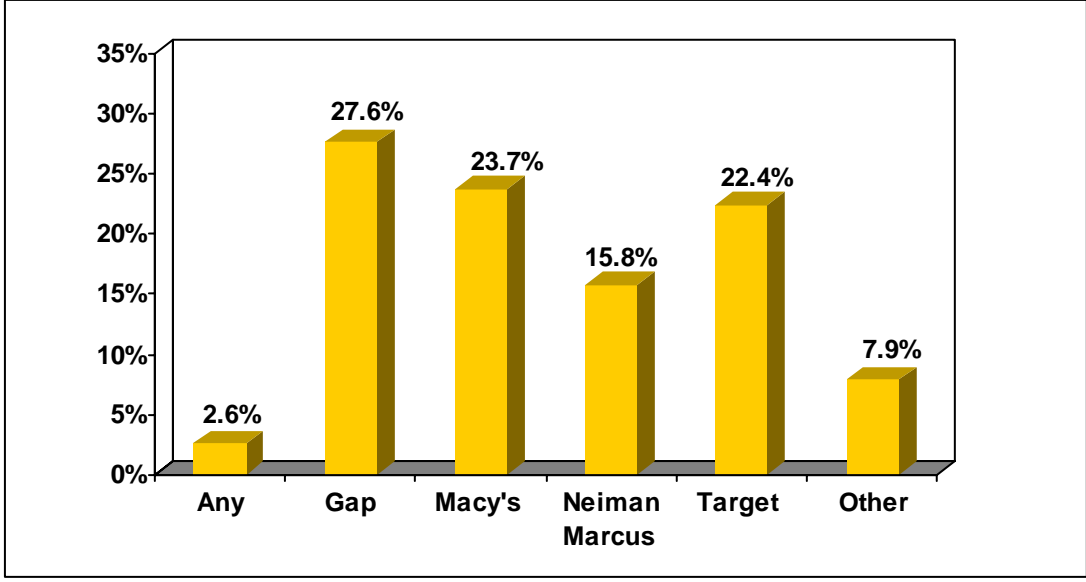
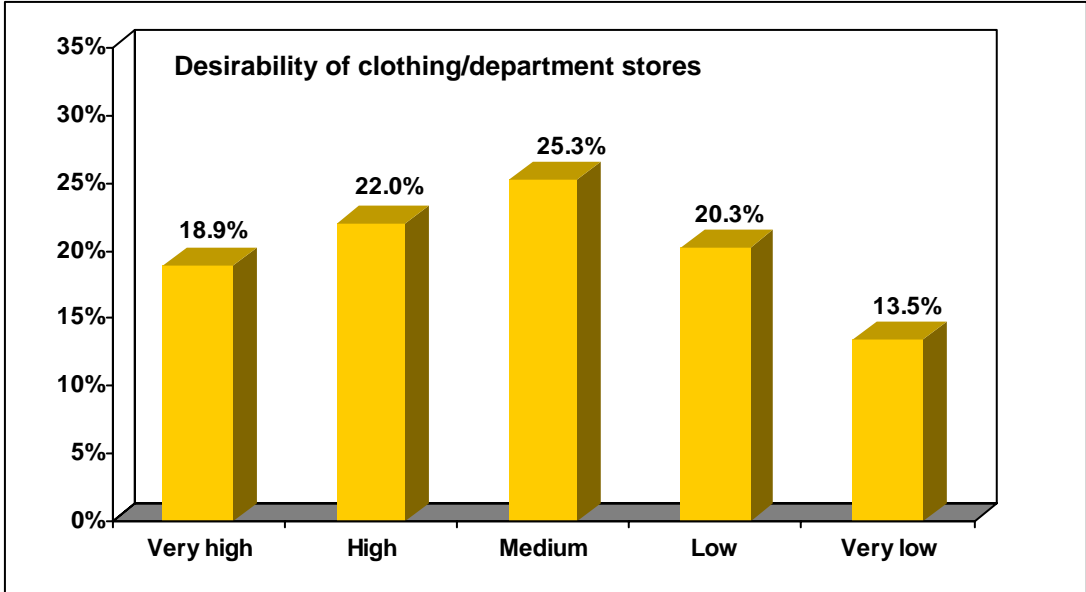
13.5% of employees cited subjective reasons for not using public transportation (would never use it, don't feel comfortable using it).

58.6% of employees cited route-related reasons for not using public transportation. These include: doesn't fit my schedule, too many transfers, takes too much time, and doesn't go where I need it.



Retail

Desirability of clothing or department stores in downtown was ranked high or very high by 40.9% of employees in downtown Fort Worth. Respondents were asked to write in the name of stores that they would like to see in downtown. Gap style stores were mentioned by 27.6%, followed by Macy's style stores (23.7%), Target style stores (22.4%), and Neiman Marcus style stores (15.8%).



Clothing and department stores categories

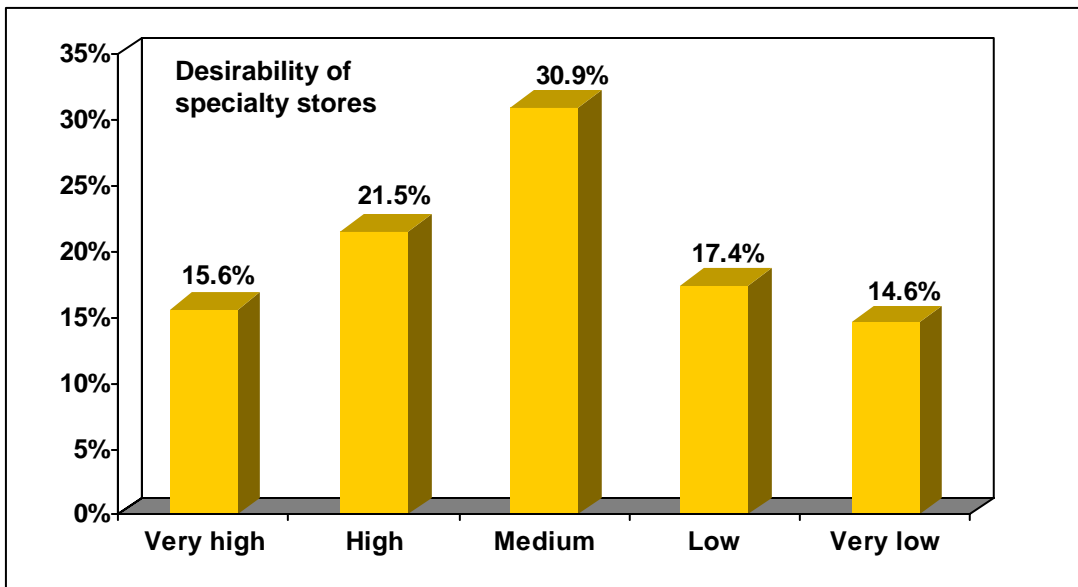
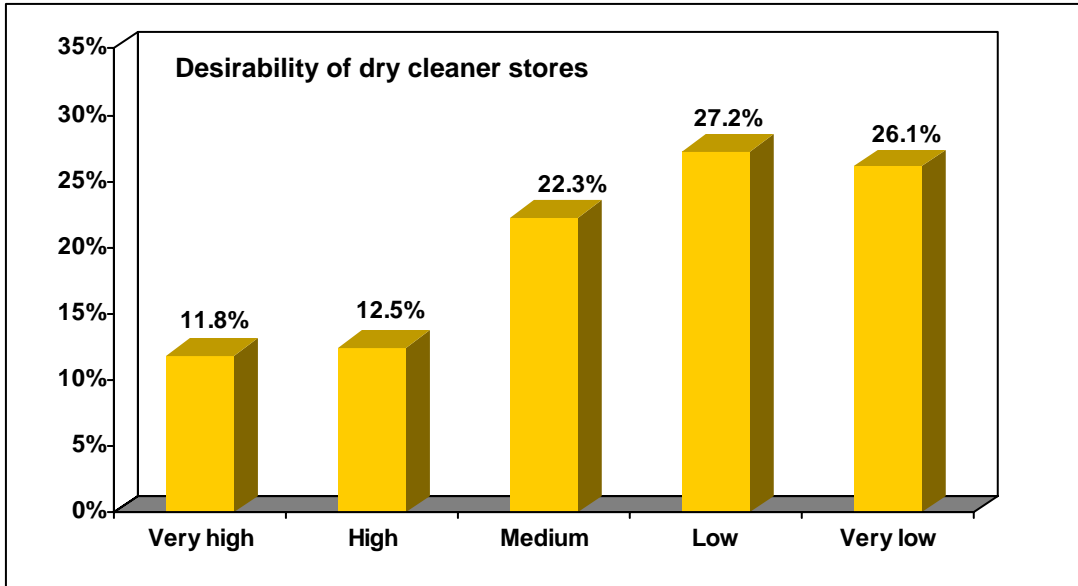
Gap: Gap, Old Navy, Banana Republic, Ann Taylor, Eddie Bauer, Express, Forever 21, H&M, Hanger and Loft, JC Crew, Limited, NY & Co, REI, Talbots.

Macy's: Dillard's, JC Penny, Macy's.

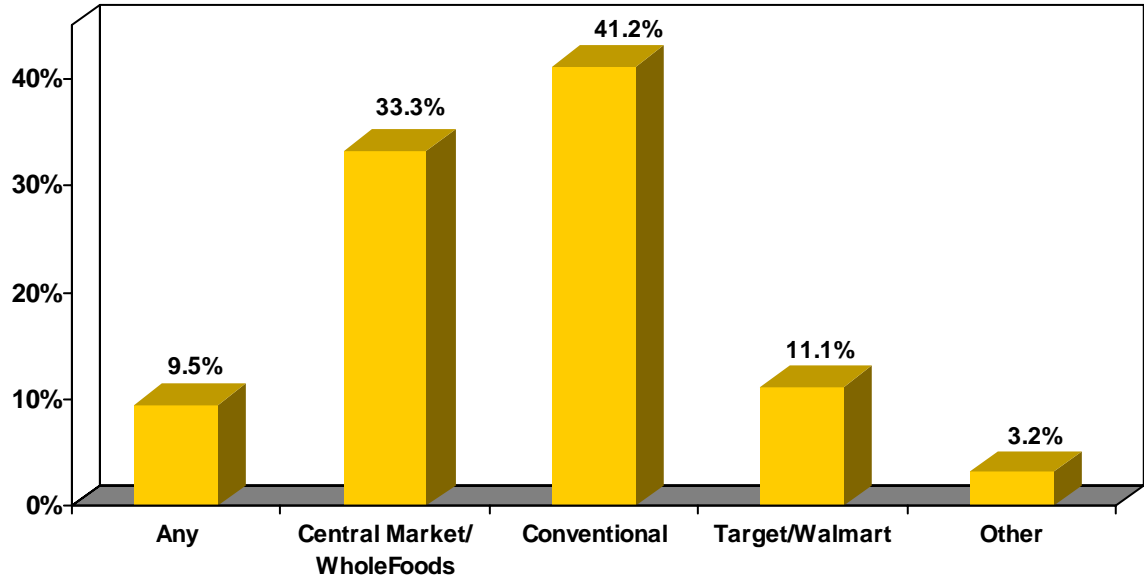
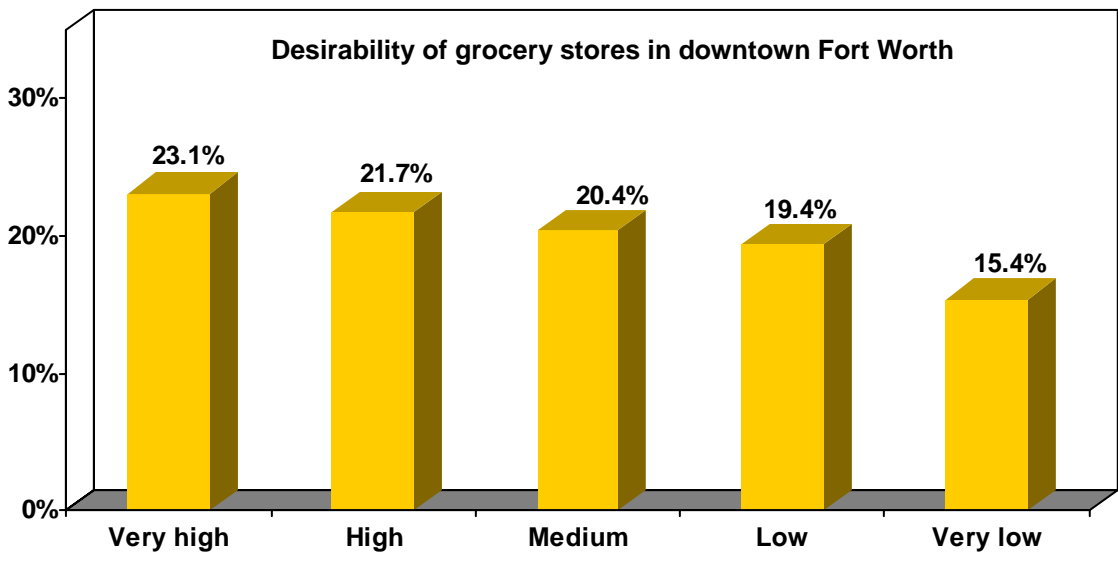
Neiman Marcus: Neiman Marcus, Nordstrom, Barney's New York, Polo, Jos A Banks, Sephora, Bloomingdales, Channel, Saks, Victoria's

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

Desirability of dry cleaners was ranked high or very high by 24.3% of respondents. 37.1% of respondents rated the desirability of specialty stores (boutiques, electronics, and other) as high or very high.



44.8% of downtown employees ranked high or very high the desirability of having a grocery store in downtown. They were asked to write in the name of desired grocery store that they would like to have in downtown Fort Worth. Conventional grocery stores were mentioned by 41.2% followed by Central Market/Whole Foods (33.3%) and Target/Wal-Mart (11.1%).



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

Downtown Safety and Cleanliness

Walking in downtown Fort Worth during the day was rated safe or very safe by 98.1% of respondents.

Walking in downtown Fort Worth after dark was rated safe or very safe by 85.9% of respondents.

94.3% of respondents rated sidewalk and street cleanliness in downtown as clean or very clean.

Homelessness in downtown was rated not serious by 27.7%, somewhat serious by 43.7% and very serious by 16.7% of respondents.

