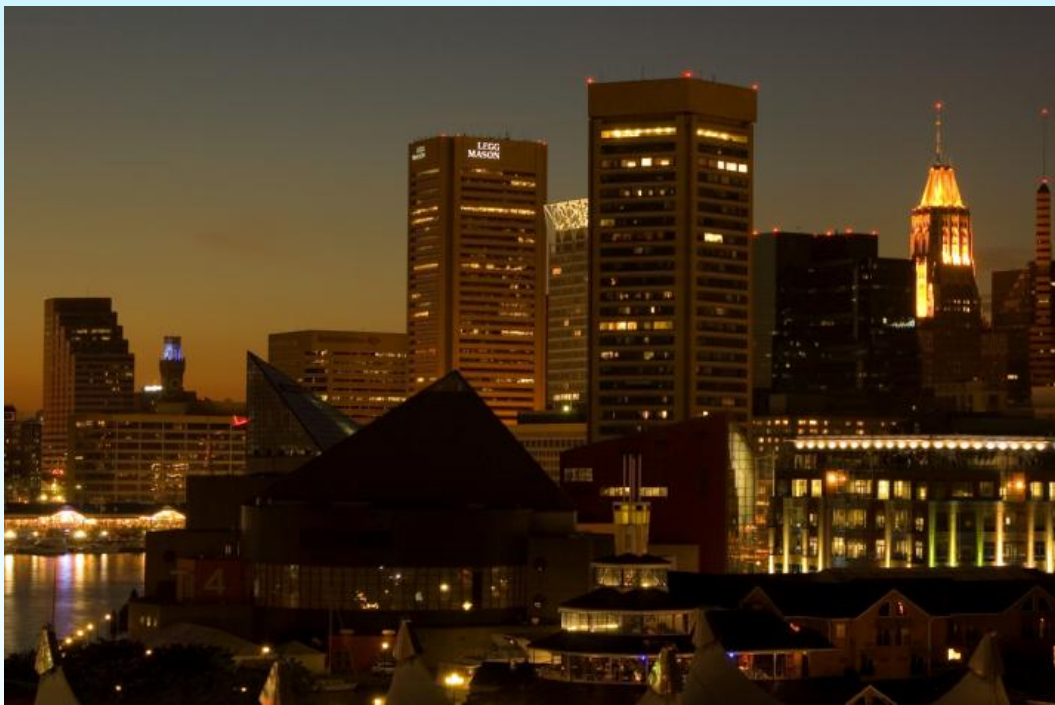




# Demographic Profile of New Downtown Baltimore Residents



Prepared by



October 2006

# RESIDENTS SURVEY

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DOWNTOWN BALTIMORE : *Outlook 2012*

## **Executive Summary: Demographic Profile of New Downtown Baltimore Residents**

### Background

In 1997, Downtown Partnership of Baltimore began a concerted push to increase the amount of residential space and the number of residents in Downtown Baltimore. Since then, Downtown's housing inventory and population have both grown dramatically, fueled by an influx of retiring baby-boom couples on one end of the age spectrum, and by students and young professionals on the other. By the end of 2005, there were more than 37,000 people living in Downtown (an area defined as being within a one-mile radius of Pratt and Light streets).

Even as people from across the region are discovering Downtown as a top residential destination, The Partnership hopes to improve residential attraction and retention by better understanding exactly who is moving into Downtown Baltimore and how to make Downtown living an even better experience.

The most current Census data does not reflect the dramatic growth in population that has occurred Downtown in the past five years, and the Census tracts include areas of Baltimore City that are not considered part of Downtown. Because of these factors, Census data does not accurately reflect Downtown's rapidly-changing demographics.

To make up for this data deficiency, Downtown Partnership commissioned the Jacob France Institute of the University of Baltimore (JFI) to administer a survey of new Downtown residents.

Specifically, The Partnership wanted to find out:

- who are the new residents living Downtown today;
- why did they chose to live there;
- what are quality of life issues that will determine how long they remain Downtown?

### The Survey

A total of 4,570 surveys were distributed; 470 were returned. (See page one of the report.) The collected data shows new Downtown Baltimore residents to be very well educated, economically able, and committed to urban living.

Overall, new residents are young (48% are ages 25-34), single (49%), and highly educated professionals (94% with BA or more) living in a 2-person household. Most are very recent residents, (32% moved here within the past three years) and 82% own their own homes.

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Of the residents who own their own home, the average monthly mortgage is \$1,574. Renters pay an average of \$1,171 a month – both of these figures are nearly twice the average for Baltimore City as a whole.

Downtown residents live close to their jobs. Sixty-nine percent (69%) of them work in Baltimore City and 21% of them walk to work. Most have skilled jobs providing high levels of household income: eighty-seven percent (87%) earn \$50,000 or more annually.

New residents like Downtown living because of the easy access to urban amenities such as cultural attractions, shopping, and nightlife.

Some of the survey's other key findings include:

- Nearly one in five new residents have children (19%);
- More than ¼ of the new residents moved to Downtown Baltimore from outside the city, and ¾ were born outside Maryland;
- While 21% of new Downtown residents walk to work, 65% commute via car.

While the survey data revealed many positives associated with new Downtown residents, it also indicated some challenges that should be addressed if Downtown hopes to retain existing residents while attracting new ones:

- Only 27% of the survey respondents indicated that they planned on living Downtown for more than 5 years (see Table 32).
- Reasons cited for moving out of Downtown included a negative perception of the crime rate (50%), wanting to start a family (43%), desiring a larger home (39%), changing jobs (34%), and the conditions of the City schools (33%) (see Table 33).
- To grow Downtown's population and replace residents that move out, Downtown must continue to be seen as a vibrant, exciting place to live. This is particularly true for younger residents for whom lifestyle is a prime factor when deciding where to reside.
- Residents are underserved by retail stores and would like to see more. Shopping options most frequently requested by survey respondents are: grocery stores (80%), high-end retail/chain/department stores (41%), restaurants/bars (25%), home improvement/hardware stores (18%), movie theatres (15%), and clothing stores (15%).

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- Newer Downtown residents are not as ethnically diverse as the pre-existing Downtown residents (not counted in this survey). Residents living in Downtown Baltimore before the year 2000 were 50% African-American, 44% White, 4% Asian, and 2% Hispanic. Newer Downtown residents are 85% White, 7% Asian, 6% African American and 3% Hispanic.
- Although Downtown has among the lowest crime rate in Baltimore and tens of millions of dollars have been invested in improving the streetscape, building facades, and parks and plazas within the Downtown Management Authority (DMA) district operated by Downtown Partnership, yet the perception that Downtown is unclean and unsafe persists.

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DOWNTOWN BALTIMORE : *Outlook 2012*

## Demographic Profile of Baltimore's Downtown Residents

### Introduction and Methodology

Although the United States Bureau of Census reports that Baltimore City lost a total of 15,339 residents from 2000 to 2005,<sup>1</sup> the population of the Downtown area has been growing. Understanding the demographics, perceptions, and needs of these new residents to Baltimore City is vital to the mission of the Downtown Partnership of Baltimore and its ability to make the Downtown area “a great place for businesses, employees, residents, and visitors”.<sup>2</sup>

Downtown Partnership contracted with the Jacob France Institute of the University of Baltimore (JFI) to develop and implement a survey of residents who moved into or within the Downtown area (an area defined as being within a one-mile radius of Pratt and Light streets) between January 2000 and June 2006 in order to develop a detailed demographic profile of these new residents. The survey focused on four specific issues relating to new Downtown residents. These were: demographics; housing information; occupational information; and the views of residents regarding Baltimore City and the Downtown area, specifically. The survey is included as Appendix 1.

The resident survey was conducted in two parts. New home buyers were mailed a questionnaire and given the option to complete it online or mail their responses in a postage paid, return envelope that was provided. New condominium and apartment residents were provided the survey by their building management and were given the option of either completing the survey online or to have the completed surveys collected from the property managers of the condominium and apartment buildings. The survey was mailed or delivered to residences on June 19, 2006 and collected through July 31, 2006.

The Baltimore City Department of Planning provided a database of 2,928 residences purchased in Downtown Baltimore after January of 2000, within a one-mile radius of the intersection at Pratt and Light Streets. Residences were removed if the purchase was either transfer of title or if the listed sale price was \$0 (150 residences). Investment properties were also removed from consideration (502 residences). A total of 299 surveys were returned from the Post Office indicating incorrect addresses or that the person is not at the provided address. This left a total of 1,977 valid addresses of Downtown residents that received a survey instrument and a postage paid return envelope.

In addition to the database from the Department of Planning, Downtown Partnership provided a list of apartment/condominium buildings in the Downtown area. Surveys were provided to each of the buildings for each of their units. A total of 2,593 surveys were provided to 27

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<sup>1</sup> [http://www.mdp.state.md.us/msdc/Pop\\_estimate/Estimate\\_05/county/dw\\_popest\\_cnty05.htm](http://www.mdp.state.md.us/msdc/Pop_estimate/Estimate_05/county/dw_popest_cnty05.htm)

<sup>2</sup> [http://www.goDowntownbaltimore.com/about\\_us.html](http://www.goDowntownbaltimore.com/about_us.html)

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## DOWNTOWN BALTIMORE : *Outlook 2012*

apartment/condominium buildings located within the Downtown area. The property managers for each building collected the completed surveys and turned them over to the survey team.

A total of 4,570 surveys were provided to Downtown residences and a total of 470 surveys were returned for a completion rate of 10.3%. Table 1 shows that 351 surveys were completed by mail and 119 surveys were completed online. The error rate for this survey was +/- 4.3% at a 95% confidence interval.

In the report, comparisons are made between the data learned from the survey about new residents and the 2005 American Community Survey (ACS), a Census-based extrapolation that uses 2000 Census data to project current and future trends for Baltimore City.

**Table 1**  
**Survey Completions by Type of Residence and Method of Completion**

	Total Surveys		Online Surveys		Mail-Based Surveys	
	Number of Responses	Percent of Total	Number of Responses	Percent of Total	Number of Responses	Percent of Total
Total Responses	470		119		351	
House	391	83%	76	64%	315	90%
Apartment/Condominium	79	17%	43	36%	36	10%

# RESIDENTS SURVEY

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DOWNTOWN BALTIMORE : *Outlook 2012*

## Resident Demographics

This survey was designed to capture information about new Downtown Baltimore City residents. Residents were asked to provide information about their age, race, marital status and educational attainment.

Most of the respondents were young, with the greatest number of respondents being 25 to 34 years old (48%) and 35 to 44 years old (24%) (see Table 2).

**Table 2**  
**Age of Survey Respondents**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	2	0%
Total Valid Responses	468	
20 to 24 years old	20	4%
25 to 34 years old	223	48%
35 to 44 years old	113	24%
45 to 54 years old	61	13%
55 to 59 years old	20	4%
60 to 64 years old	14	3%
Over 64 years old	17	4%

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

This survey found that 85% of these new residents were white, 7% were Asian, 6% were African-American and 3% were Hispanic (see Table 3). The pre-existing Downtown residential population not included in this survey is more ethnically diverse. A Claritas SiteReport using updated projections from the 2000 Census shows the pre-existing residential demographics to be: 50% African-American, 44% white, 4% Asian, and 2% Hispanic.

**Table 3**  
**Race of Respondents**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	2	0%
Total Valid Responses	468	
White	396	85%
Asian	34	7%
Black/African American	29	6%
Other	9	2%

Similar to the results of the 2005 ACS, 3% of the respondents to the Downtown survey were Spanish/Hispanic/Latino (see Table 4). The 2005 ACS found that 2.3% of the City's residents were Hispanic or Latino.

**Table 4**  
**Are You Spanish/Hispanic/Latino?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	1	0%
Total Valid Responses	469	
Yes	12	3%
No	457	97%

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Of the survey respondents, 49% reported never being married and 39% reported being married (see Table 5). The 2005 ACS reported that 43% of City residents have never been married and that 32% are married.

**Table 5**  
**Marital Status of Respondents**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	2	0%
Total Valid Responses	468	
Never Married	228	49%
Married	184	39%
Divorced	42	9%
Separated	8	2%
Widowed	6	1%

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

New Downtown Baltimore residents are highly educated. Forty percent (40%) of the survey's respondents have a Bachelor's degree and 30% have a Master's degree. Twenty four percent (24%) reported having a Graduate or Professional degree (see Table 6). The 2005 ACS found that only 10% of City residents have a Bachelor's degree and that less than 9% of City residents have a Graduate or Professional degree.

**Table 6**  
**Highest Degree or Level of School**  
**Completed by Respondents**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	4	1%
Total Valid Responses	466	
12th grade - no diploma	1	0%
High school graduate	4	1%
Some college	17	4%
Associate degree	4	1%
Bachelor's degree	185	40%
Master's degree	139	30%
Professional degree	44	9%
Doctorate degree	72	15%

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

The average number of adults per Downtown household is two (see Table 7) and the average number of children per household is 0.3 (see Table 8). This survey captured demographic information on a total of 742 adults and 87 children under the age of 18 years old. The 2005 ACS reported 1.8 adults per household and 0.68 children per household in Baltimore City.

**Table 7**  
**How Many Adults Live in This Household?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	8	2%
Total Valid Responses	462	
1 adult	202	44%
2 adults	242	52%
3 or more adults	18	4%
Average	2 adults per household	

**Table 8**  
**How Many Children Live in This Household?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	208	44%
Total Valid Responses	262	
0 children	201	77%
1 to 2 children	56	21%
3 or more children	5	2%
Average	0.3 children per household	

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Slightly more than a quarter (26%) of new Downtown Baltimore residents were born in Maryland. Those not born in Maryland were primarily from Mid-Atlantic States. The most frequently cited states where Downtown residents were born include Pennsylvania (13%), New Jersey (8%), New York (8%), Ohio (4%), Illinois (4%), and California (4%). Overall, new Downtown residents were born in 69 states and countries (see Table 9).

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DOWNTOWN BALTIMORE : *Outlook 2012*

**Table 9**  
**In Which State Were You Born?**

	Number of Responses	Percent of Total		Number of Responses	Percent of Total
Total Responses	470				
No Response	9	7%			
Outside of United States	27	7%			
Total Valid Responses	434				
Maryland	111	26%	Maine	2	0%
Pennsylvania	56	13%	Tennessee	2	0%
New Jersey	36	8%	West Virginia	2	0%
New York	33	8%	Alabama	1	0%
Ohio	18	4%	Arkansas	1	0%
Illinois	17	4%	Colorado	1	0%
California	16	4%	Georgia	1	0%
Virginia	15	3%	Iowa	1	0%
District of Columbia	14	3%	Kansas	1	0%
Michigan	12	3%	Montana	1	0%
Wisconsin	12	3%	Mississippi	1	0%
Massachusetts	11	3%	Nevada	1	0%
North Carolina	10	2%	North Dakota	1	0%
Texas	9	2%	Oregon	1	0%
Indiana	7	2%	Puerto Rico	1	0%
Connecticut	6	1%	Rhode Island	1	0%
Florida	6	1%	Utah	1	0%
South Carolina	6	1%	Washington	1	0%
Delaware	5	1%	Wyoming	1	0%
Hawaii	3	1%			
Kentucky	3	1%			
Minnesota	3	1%			
Missouri	3	1%			

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Of the persons not born in Maryland, fifty-seven percent (57%) have lived in the state for between one to eight years (see Table 10). The average length of residence in Maryland as a whole is 10 years. While the largest percentage was residents who have been here 1-to-3 years, fifty-seven percent (57%) have been here 1-to-8 years.

**Table 10**  
**If Not Born in Maryland,**  
**How Long Have You Lived in Maryland?**

	Number of Responses	Percent of Total
Total Responses	350	
No Response	8	2%
Total Valid Responses	342	
Under 1 year	16	5%
1 to 3 years	110	32%
4 to 8 years	85	25%
9 to 12 years	41	12%
13 to 16 years	18	5%
17 to 20 years	16	5%
21 to 30 years	33	10%
31 to 40 years	16	5%
41 to 50 years	4	1%
Over 50 years	3	1%
Average		10 years

# RESIDENTS SURVEY

## DOWNTOWN BALTIMORE : *Outlook 2012*

Eighty-three percent (83%) of the respondents have lived in Downtown from one to ten years. Most have lived there from one to three years (45%) (see Table 11). Respondents born in Maryland reported living in Downtown Baltimore for nearly eight years (7.9 years) and persons not born in Maryland have lived in the Baltimore for slightly more than four years (4.1 years). The average period of Downtown residence is 5 years.

**Table 11**  
**How Long Have You Lived in**  
**Downtown Baltimore?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	10	2%
Total Valid Responses	460	
Under 1 year	41	9%
1 to 3 years	207	45%
4 to 6 years	110	24%
7 to 10 years	65	14%
11 to 15 years	16	3%
16 to 20 years	10	2%
21 to 30 years	5	1%
31 to 40 years	3	1%
41 to 50 years	1	0%
Over 50 years	2	0%
Average		5 years

### Housing Information

Eighty two percent (82% of new Downtown residents own their own home while 18% rent (see Table 12). Of the persons that own their home, 62% reported a monthly mortgage cost of \$901 to \$1,800. The average mortgage was \$1,574 per month. Compared to the 2005 ACS, the costs of residences in the Downtown area are more expensive than the median housing costs for the entire City. The median mortgage cost for the City in 2005 was \$853 and the median rent was \$498.

# RESIDENTS SURVEY

## DOWNTOWN BALTIMORE : *Outlook 2012*

Of new Downtown renters, thirty-seven percent (37%) reported their monthly rent as between \$901 and \$1,200 (see Table 13). The average monthly rent was \$1,171.

**Table 12**  
**Do You Rent or Own This Residence?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	5	1%
Total Valid Responses	465	
Rent	85	18%
Own	380	82%

**Table 13**  
**Monthly Rent/Mortgage Cost of Respondents**

	Total		Rent		Mortgage	
	Number of Responses	Percent of Total	Number of Responses	Percent of Total	Number of Responses	Percent of Total
Total Responses	465		85		380	
No Response	88	19%	12	14%	76	20%
Total Valid Responses	377		73		304	
Under \$600	12	3%	4	5%	8	3%
\$601 to \$900	45	12%	15	21%	30	10%
\$901 to \$1,200	90	24%	27	37%	63	21%
\$1,201 to \$1,500	77	20%	17	23%	60	20%
\$1,501 to \$1,800	73	19%	10	14%	63	21%
\$1,801 to \$2,100	36	10%	0	0%	36	12%
Over \$2,100	44	12%	0	0%	44	14%
Average monthly cost		\$1,516		\$1,171		\$1,574

# RESIDENTS SURVEY

## DOWNTOWN BALTIMORE : *Outlook 2012*

New Downtown residents report living here for an average of five years, three of those years in their current residence. This indicates some degree of intra-Downtown mobility. Among renters, 23% have lived at their current residence for less than 1 year, 66% for 1-to-3 years, and 6% reported living at their current residence for 4-to-6 years. Nine percent (9%) have been in their current homes for less than 1 year, 57% for 1-to-3 years, and 31% have lived in their current home for 4-to-6 years. Eight percent (8%) reported living at their current residence for more than 7 years (see Table 14).

**Table 14**  
**How Long Have You Lived in**  
**That Residence?**

	Total		Rent		Own	
	Number of Responses	Percent of Total	Number of Responses	Percent of Total	Number of Responses	Percent of Total
Total Responses	470		85		380	
No Response	17	4%	6	7%	11	3%
Total Valid Responses	453		79		369	
Under 1 year	51	11%	18	23%	33	9%
1 to 3 years	268	59%	52	66%	211	57%
4 to 6 years	119	26%	5	6%	114	31%
7 to 10 years	10	2%	3	4%	7	2%
11 to 15 years	2	0%	0	0%	2	1%
16 to 20 years	1	0%	1	1%	0	0%
21 to 30 years	1	0%	0	0%	1	0%
31 to 40 years	0	0%	0	0%	0	0%
41 to 50 years	0	0%	0	0%	0	0%
Over 50 years	1	0%	0	0%	1	0%
Average	3 years		2 years		3 years	

# RESIDENTS SURVEY

## DOWNTOWN BALTIMORE : *Outlook 2012*

A sizeable majority of Downtown residents own cars. Forty-four percent (44%) own one car and 46% own two cars (see Table 15). The 465 survey respondents own a total of 705 cars, an average of 1.5 cars per household.

**Table 15**  
**How Many Cars Are Currently Owned by  
Persons Living in This Household?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	2	0%
Total Valid Responses	468	
None	26	6%
1 car	204	44%
2 cars	216	46%
3 or more cars	22	5%
Average	1.5 cars per household	

It is positive to note that, when asked about their plans for the next twelve months, 75% of new Downtown residents do not plan to move from the area. Twenty five percent report that they are looking to move in the next 12 months (see Table 16). Of those planning to move, a slight majority plan to relocate within Maryland (61%) (see Table 17) while fifty-nine percent (59%) will stay in Baltimore City. Top relocation destinations outside Baltimore City include Columbia, Baltimore County, Silver Spring, Severna Park, and Ellicott City (see Table 18).

**Table 16**  
**Are You Looking to Move The Next  
12 Months?**

	Number of Responses	Percent of Total
Total Responses	470	1%
No Response	6	
Total Valid Responses	464	
Yes	118	25%
No	346	75%

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DOWNTOWN BALTIMORE : *Outlook 2012*

**Table 17**  
**If Yes, Where Are You Looking to Move?**

	Number of Responses	Percent of Total
Total Responses	118	
No Response	30	25%
Total Valid Responses	88	
Maryland	54	61%
District of Columbia	5	6%
Virginia	5	6%
California	3	3%
Florida	3	3%
New York	3	3%
Illinois	2	2%
North Carolina	2	2%
Pennsylvania	2	2%
Connecticut	1	1%
Delaware	1	1%
Hawaii	1	1%
Oregon	1	1%
Other	5	6%

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DOWNTOWN BALTIMORE : *Outlook 2012*

**Table 18**  
**If Moving Within Maryland, In Which**  
**City/Town Are You Looking to Move?**

	Number of Responses	Percent of Total
Total Responses	54	
No Response	3	6%
Total Valid Responses	51	
Baltimore City	30	59%
Columbia	4	8%
Baltimore County	3	6%
Silver Spring	2	4%
Severna Park	2	4%
Ellicott City	2	4%
White Marsh	1	2%
Lutherville	1	2%
Hartford	1	2%
Frederick	1	2%
Carroll County	1	2%
Bethesda	1	2%
Arbutus	1	2%
Annapolis	1	2%

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## DOWNTOWN BALTIMORE : *Outlook 2012*

The most frequently cited reasons for moving include job changes (20%), different amenities (14%), to purchase a home (9%), and lower taxes (9%) (see Table 19). Most plan to move into a single-family home (37%) or townhouse (26%) (see Table 20).

**Table 19**  
**What Is The Reason(s) for Relocation?**

	Number of Responses	Percent of Total
Total Responses	118	
No Response	12	10%
Total Valid Responses	106	
Job	21	20%
Amenities	15	14%
Buying a house	12	9%
Taxes	10	9%
Crime	7	7%
Change in marital status	5	5%
Schools	5	5%
Lower housing costs	3	3%
Other	28	26%

**Table 20**  
**What Type of Residence Are You Planning on Moving into?**

	Number of Responses	Percent of Total
Total Responses	118	
No Response/Don't know	19	16%
Total Valid Responses	99	
Single-family home	37	37%
Townhouse	26	26%
Condominium	19	19%
Apartment	17	17%

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Of those respondents who do not plan to move within the next 12 months, thirty-nine percent (39%) said they will live in Downtown from one to three years and 31% planned to live in the Downtown area an additional four to six years (see Table 21). The average length of time that residents planned on living in the Downtown area was five years.

**Table 21**  
**If Not Planning to Move Within The Next**  
**12 Months, How Long Do You Plan on**  
**Living in Downtown Baltimore?**

	Number of Responses	Percent of Total
Total Responses	346	
No Response	147	42%
Total Valid Responses	199	
Under 1 year	17	9%
1 to 3 years	78	39%
4 to 6 years	61	31%
7 to10 years	26	13%
11 to 15 years	4	2%
Over 15 years	13	7%
Average		5 years

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DOWNTOWN BALTIMORE : *Outlook 2012*

## Occupation and Employment Information

Almost 90% of the survey respondents reported working within Maryland while 7% work in Washington D.C. (see Table 22). Table 23 has a breakdown of Downtown residents' places of employment.

**Table 22**  
**Where Do You Currently Work?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	23	5%
Total Valid Responses	447	
Maryland	400	89%
District of Columbia	33	7%
Pennsylvania	5	1%
Virginia	4	1%
Other	5	1%

# RESIDENTS SURVEY

DOWNTOWN BALTIMORE : *Outlook 2012*

**Table 23**  
**In Which City/Town in Maryland Do You Currently Work?**

	Number of Percent Responses of Total		Number of Percent Responses of Total	
Total Responses	400			
No Response	4	5%		
Total Valid Responses	396			
Baltimore City	274	69%	Ashton	1 0%
Columbia	23	6%	Bel Air	1 0%
Annapolis	11	3%	Beltsville	1 0%
Linthicum	8	2%	Brooklandville	1 0%
Owings Mills	8	2%	Chevy Chase	1 0%
Laurel	7	2%	Elkridge	1 0%
Ft. Meade	6	2%	Essex	1 0%
Towson	6	2%	Frederick	1 0%
Hunt Valley	5	1%	Hagerstown	1 0%
Bethesda	4	1%	Howard County	1 0%
College Park	4	1%	Lanham	1 0%
Edgewood	3	1%	Millersville	1 0%
Hanover	3	1%	Sparrows Point	1 0%
Silver Spring	3	1%	Sykesville	1 0%
Timonium	3	1%	White Marsh	1 0%
Baltimore County	3	1%		
Glen Burnie	2	1%		
Greenbelt	2	1%		
Rockville	2	1%		
Woodlawn	2	1%		
Marriottsville	2	1%		

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Nearly two-thirds (65%) of new Downtown residents used a motor vehicle as their primary method of commuting, while 21% walk to their job (see Table 24). The percentage of Downtown residents who walk to work is greater than the rest of Baltimore City, where only 7% of the population walks to work, according to the ACS. Conversely, the ACS shows that 19.5% of the overall City population commuted via public transportation while the Downtown Partnership survey shows only 11% of Downtown residents use transit.

**Table 24**  
**How Do You Usually Get to Work?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	29	6%
Total Valid Responses	441	
Car/truck/van	286	65%
Walk	92	21%
Railroad/Metro/Light Rail	32	7%
Bus	17	4%
Bicycle	7	2%
Taxicab	1	0%
Other Method	6	1%

# RESIDENTS SURVEY

## DOWNTOWN BALTIMORE : *Outlook 2012*

Downtown residents are employed in a variety of industries including: Professional, Scientific, Management or Administrative Services (28%), Education/Health/Social Services (24%), and Finance/Insurance/Real Estate (17%) (see Table 25).

**Table 25**  
**In Which Industry Are You Employed?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	28	6%
Total Valid Responses	442	
Professional, Scientific, Management or Admin. Services	124	28%
Educational/Health/Social Services	104	24%
Finance/Insurance/Real Estate	76	17%
Public Administration	24	5%
Arts/Entertainment/Accommodation/Food Services	20	5%
Construction	12	3%
Manufacturing	11	2%
Retail Trade	10	2%
Information	6	1%
Wholesale Trade	4	1%
Transportation/Warehousing/ Utilities	2	0%
Other	49	11%

Survey respondents' occupations were matched to the Standard Occupational Classification codes of the United States Bureau of Labor Statistics.<sup>3</sup> The most frequently cited types of occupations include: Management (16%), Healthcare Practitioners and Technical (12%), Business and Financial Operations (10%), and Sales and related occupations (7%) (see Table 26). The persons surveyed that were married were also asked to provide the occupation of their spouse, and the results are similar. The most frequently cited occupations for spouses were: Healthcare Practitioners and Technical (12%), Management (8%), Sales and related occupations (7%), Architecture and Engineering (7%), and Office and Administrative support occupations (7%) (see Table 27).

<sup>3</sup> <http://www.bls.gov/soc/socguide.htm>

# RESIDENTS SURVEY

DOWNTOWN BALTIMORE : *Outlook 2012*

**Table 26**  
**What Is Your Current Occupation?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	24	5%
Total Valid Responses	446	
Management Occupations	73	16%
Healthcare Practitioners and Technical Occupations	52	12%
Business and Financial Operations Occupations	45	10%
Sales and Related Occupations	31	7%
Architecture and Engineering Occupations	28	6%
Life, Physical, and Social Science Occupations	25	6%
Education, Training, and Library Occupations	25	6%
Student	24	5%
Legal Occupations	22	5%
Arts, Design, Entertainment, Sports, and Media Occupations	17	4%
Office and Administrative Support Occupations	11	2%
Computer and Mathematical Occupations	10	2%
Healthcare Support Occupations	9	2%
Food Preparation and Serving Related Occupations	6	1%
Protective Service Occupations	5	1%
Community and Social Services Occupations	3	1%
Military Specific Occupations	2	0%
Building and Grounds Cleaning and Maintenance Occupations	1	0%
Personal Care and Service Occupations	1	0%
Production Occupations	1	0%
Other	55	12%

# RESIDENTS SURVEY

DOWNTOWN BALTIMORE : *Outlook 2012*

**Table 27**  
**If Married, What Is The Current Occupation of Your Spouse?**

	Number of Responses	Percent of Total
Total Responses	184	
No Response	22	12%
Total Valid Responses	162	
Healthcare Practitioners and Technical Occupations	20	12%
Management Occupations	13	8%
Sales and Related Occupations	12	7%
Architecture and Engineering Occupations	11	7%
Office and Administrative Support Occupations	11	7%
Arts, Design, Entertainment, Sports, and Media Occupations	10	6%
Computer and Mathematical Occupations	8	5%
Legal Occupations	8	5%
Education, Training, and Library Occupations	8	5%
Student	7	4%
Community and Social Services Occupations	6	4%
Business and Financial Operations Occupations	5	3%
Healthcare Support Occupations	4	2%
Protective Service Occupations	4	2%
Construction and Extraction Occupations	2	1%
Life, Physical, and Social Science Occupations	1	1%
Other	32	20%

# RESIDENTS SURVEY

## DOWNTOWN BALTIMORE : *Outlook 2012*

Downtown residents earn high levels of annual household income, with 87% reporting household incomes of \$50,000 or more. Twenty-two percent (22%) of households earn \$50,000 to \$74,999, and 20% earn between \$75,000 and \$99,999. Fifteen percent (15%) of survey respondents reported annual household income of \$200,000 (see Table 28). Residents that make lower levels of income include students (16 respondents), healthcare practitioners and technical occupations (7 respondents), and arts, design, entertainment, sports, and media occupations (4 respondents).

**Table 28**  
**Annual Household Income of Respondents**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	31	7%
Total Valid Responses	439	
Less than \$25,000	12	3%
\$25,000 to \$34,999	8	2%
\$35,000 to \$49,999	36	8%
\$50,000 to \$74,999	96	22%
\$75,000 to \$99,999	86	20%
\$100,000 to \$149,999	85	19%
\$150,000 to \$199,999	49	11%
\$200,000 or more	67	15%

# RESIDENTS SURVEY

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DOWNTOWN BALTIMORE : *Outlook 2012*

## Downtown Resident Views of Baltimore City

Nearly three of every four new residents to the Downtown area were born outside of Maryland. When asked why they initially chose to live in Downtown Baltimore, residents provided a total of 1,507 reasons. The most frequently cited reasons were the urban amenities (73%), that the resident prefers an urban environment (69%), close proximity to work (57%), and the cultural attractions (55%) (see Table 29). (Note that the respondents were each encouraged to report more than one reason.)

**Table 29**  
**What Is The Reason(s) That You Chose to Live  
in Downtown Baltimore?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	10	2%
Total Valid Responses	460	
Urban amenities	334	73%
Prefer urban environment	317	69%
Proximity to work	263	57%
Cultural attractions	251	55%
Friends/family near by	115	25%
Cost of housing	114	25%
Proximity to school	48	10%
Downtown Partnership Clean and Safe Team	22	5%
Other	43	9%

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

When asked what they liked best about living in Downtown Baltimore once they arrived, residents provided a total of 788 responses, citing the proximity (convenience) to work, shopping, and nightlife (71%), amenities (47%), community (21%), the urban environment (20%), and the cultural attractions (13%) as the best things about Downtown living (see Table 30). (Note that the respondents were each encouraged to report more than one reason.)

**Table 30**  
**What Do You Like Most About Living**  
**in Downtown Baltimore?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	48	10%
Total Valid Responses	422	
Proximity (convenience)	301	71%
Amenities	200	47%
Community	88	21%
Urban environment	85	20%
Cultural attractions	53	13%
Sports events	17	4%
Cost of Living/Affordable housing	16	4%
Improvement in City conditions	10	2%
Other	18	4%

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

When asked what they like least about living in Downtown Baltimore, residents provided 814 responses, listing conditions common to urban areas. The list includes concerns about crime/drugs (59%), the cleanliness/pollution (33%), lack of, or price for, parking (21%), the homeless/beggars (14%), and the high cost of living (13%) (see Table 31). (Note that the respondents were each encouraged to report more than one reason.)

**Table 31**  
**What Do You Like Least About Living**  
**in Downtown Baltimore?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	45	10%
Total Valid Responses	425	
Crime/Drugs	249	59%
Cleanliness/Pollution	139	33%
Lack of parking/ Price of parking	91	21%
Homeless/Beggars	61	14%
High Cost of living	57	13%
Lack of shopping options	40	9%
Traffic/Congestion	37	9%
Mass Transit	33	8%
Noise	28	7%
Schools	28	7%
Lack of green areas	18	4%
Other	33	8%

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

The largest percentage (37%) of residents were unsure of their future plans. While twenty-seven percent (27%) of new residents plan on living in Downtown for five years or more, and 36% plan to move from the area, the greatest number were unsure if they would be living in the area more than five years (see Table 32).

**Table 32**  
**Do You Plan on Living Within Downtown**  
**Baltimore More Than The Next Five**  
**Years?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	6	1%
Total Valid Responses	464	
Yes	124	27%
No	168	36%
Unsure	172	37%

# RESIDENTS SURVEY

## DOWNTOWN BALTIMORE : *Outlook 2012*

Residents provided 769 reasons as to why they would relocate from the Downtown area. These reasons included crime and the perception of crime (50%), wanting to start a family (43%), needing a larger home (39%), changing jobs (34%), and the conditions of the City schools (33%) (see Table 33). (Note that the respondents were each encouraged to report more than one reason.)

**Table 33**  
**What Are The Reasons That Would Cause**  
**You to Move Out of Downtown Baltimore?**

	Number of Responses	Percent of Total
Total Responses	340	
No Response	92	27%
Total Valid Responses	248	
Crime/Perception of crime	123	50%
Start a family	107	43%
Need a larger home	97	39%
Change of employment	84	34%
Schools	83	33%
Lack of parking	70	28%
Change in marital status	49	20%
Lack of retail	36	15%
Cost of living	30	12%
Traffic/Congestion	26	10%
Lack of mass transit	24	10%
Retirement	8	3%
Other	32	13%

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

Many respondents would reconsider a move from the City if key improvements occur in the coming years. The list of 650 improvements includes: a reduction in crime (93%), improved public schools (73%), more open spaces/public parks (50%), more shopping options (46%), and more/better public transit (37%) (see Table 34). (Note that the respondents were each encouraged to report more than one reason.)

**Table 34**  
**Which Changes Would Cause You to Stay**  
**in Downtown Baltimore?**

	Number of Responses	Percent of Total
Total Responses	340	
No Response	188	55%
Total Valid Responses	152	
Reduction in crime	142	93%
Improved public schools	111	73%
More open spaces/parks	76	50%
More shopping options	70	46%
More/improved public transit	56	37%
More private school options	46	30%
More charter schools	33	22%
More job opportunities	30	20%
Greater variety of housing	29	19%
More events/planned activities	23	15%
Other	34	22%

# RESIDENTS SURVEY

## DOWNTOWN BALTIMORE : *Outlook 2012*

As noted previously, although Downtown residents appreciate the area’s many amenities, the lack of shopping options is an often-cited concern. When asked specifically about Downtown retail, residents mentioned a total number of 1,112 stores or types of stores that they would like to have open in the near future. The most frequently cited types of stores included grocery stores (80%), high-end retail/chain/department stores (41%), restaurants/bars (25%), home improvement/hardware stores (18%), movie theatres (15%), and clothing stores (15%) (see Table 35). Examples of grocery stores included Trader Joe’s, Giant, and Whole Foods. Examples of retail stores included Nordstrom, Target, and Wal Mart. Examples of home improvement/hardware stores included Home Depot and Lowes and examples of clothing stores included the Gap and Banana Republic.

**Table 35**  
**What Type of Businesses You Would Like to See**  
**Located Within Downtown Baltimore?**

	Number of Responses	Percent of Total
Total Responses	470	
No Response	34	7%
Total Valid Responses	436	
Grocery Stores	347	80%
Retail/Chain/Department Stores	178	41%
Restaurants/Bars	109	25%
Home Improvement/Hardware Stores	78	18%
Movie Theaters	66	15%
Clothing Stores	66	15%
Coffee Shops	41	9%
Small Specialty Stores	24	6%
Boutiques	18	4%
Book Stores	17	4%
Bakeries	15	3%
Furniture/Home Goods	14	3%
Other	139	32%

# RESIDENTS SURVEY

DOWNTOWN BALTIMORE : *Outlook 2012*

## Appendix 1 – Survey Instrument

The Downtown Partnership of Baltimore with the assistance of the University of Baltimore is conducting a survey to learn more about the residents of Baltimore City, their preferences, and what can be done to make living in the City more enjoyable. Your assistance in completing this survey is vital to these efforts. Please answer each of the following questions and mail your completed survey in the return envelope that is provided. Or you can choose to answer these questions online at <http://www.surveymonkey.com/s.asp?u=956992267084>. **All responses will be kept confidential and no individual responses will be identified.** We ask you to return this survey no later than **July 31, 2006**. Thank you for making Baltimore the place to live, work, and to play.

### Demographic Information

1. What is your age:  19 and Under       25 to 34       45 to 54       60 to 64  
 20 to 24       35 to 44       55 to 59       65 andOver
2. Are you Spanish/Hispanic/Latino?       Yes     No
3. What is your race? (Please mark one or more races)  
 White     Black/African Amer.     Asian     Other (Please describe\_\_\_\_\_)
4. What is your marital status?  
 Married     Widowed     Divorced     Separated     Never married
5. What is the highest degree or level of school you have **COMPLETED**?  
 12<sup>th</sup> grade – no diploma       Associate degree       Professional degree  
 High school graduate       Bachelor's degree       Doctorate degree  
 Some college       Master's degree
6. How many persons (including you) live in this household?  
Adults (persons over the age of 18) \_\_\_\_\_ Children \_\_\_\_\_
7. In which City/town and State were you born?  
City/Town \_\_\_\_\_ State \_\_\_\_\_
8. If you were not born in Maryland, how long have you lived in Maryland \_\_\_\_\_
9. How long have you lived in Downtown Baltimore? \_\_\_\_\_

# RESIDENTS SURVEY

DOWNTOWN BALTIMORE : *Outlook 2012*

## Housing Information

10. Do you rent or own this residence?

- Rent If you *RENT*, what is your monthly rent? \_\_\_\_\_
- Own If you *OWN*, what is your monthly mortgage (excluding fees)? \_\_\_\_\_

11. How long have you lived at this residence? \_\_\_\_\_

12. How many cars are currently owned by persons living in this household? \_\_\_\_\_

13. Are you looking to move within the next 12 months?

- Yes If YES, where? City/Town \_\_\_\_\_ State \_\_\_\_\_
- If YES, why? \_\_\_\_\_
- If YES, what type of residence are you planning on moving into?
- Apartment  Condominium  Townhouse
- Single-family home  Other (Please describe \_\_\_\_\_)
- No If NO, how long do you plan on living in Downtown Baltimore? \_\_\_\_\_

## Occupation Information

14. In which City/town do you currently work?

City/Town \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

15. How do you usually get to work? (check the one method used for most of the distance)

- Car/truck/van  Bus  Walk  Railroad (Train/MARC/Light rail)
- Motorcycle  Bicycle  Taxicab  Other method

16. Which of these best describes the industry in which YOU are employed? (choose one)

- Finance/Insurance/Real Estate  Construction  Manufacturing
- Transportation/Warehousing/Utilities  Retail Trade  Information
- Educational/Health/Social Services  Wholesale Trade  Public Admin.
- Arts/Entertainment/Accommodation/Food Services
- Professional, Scientific, Management or Administrative Services
- Other (Please describe \_\_\_\_\_)

17. What is your current occupation? \_\_\_\_\_

If married, what is the current occupation of your spouse? \_\_\_\_\_

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

18. Which group best represents your annual household income?

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Less than \$25,000   | <input type="checkbox"/> \$50,000 to \$74,999   | <input type="checkbox"/> \$150,000 to \$199,999 |
| <input type="checkbox"/> \$25,000 to \$34,999 | <input type="checkbox"/> \$75,000 to \$99,999   | <input type="checkbox"/> \$200,000 or more      |
| <input type="checkbox"/> \$35,000 to \$49,999 | <input type="checkbox"/> \$100,000 to \$149,999 |   |

### Questions Regarding Baltimore City

19. What is the reason(s) that you chose to live in Downtown Baltimore? (check all that apply)

- |  |  |
|--|--|
| <input type="checkbox"/> Proximity to work             | <input type="checkbox"/> Prefer urban environment                              |
| <input type="checkbox"/> Proximity to school           | <input type="checkbox"/> Cultural attractions                                  |
| <input type="checkbox"/> Cost of housing               | <input type="checkbox"/> Urban amenities (Bars, restaurants, clubs, nightlife) |
| <input type="checkbox"/> Friends/family nearby         | <input type="checkbox"/> Downtown Partnership Clean and Safe Team              |
| <input type="checkbox"/> Other (Please describe _____) |  |

20. What do you like most about living in Downtown Baltimore?

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21. What do you like least about living in Downtown Baltimore?

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22. Do you plan on living within Downtown Baltimore more than the next five years?

- Yes       No       Unsure

If NO, which of the following reason(s) would most likely cause you to move out of Downtown Baltimore? (check all that apply)

- |  |  |  |                                     |
|--|--|--|-------------------------------------|
| <input type="checkbox"/> Start a family            | <input type="checkbox"/> Lack of transit | <input type="checkbox"/> Lack of parking               | <input type="checkbox"/> Schools    |
| <input type="checkbox"/> Crime/perception of crime | <input type="checkbox"/> Cost of living  | <input type="checkbox"/> Lack of retail                | <input type="checkbox"/> Retirement |
| <input type="checkbox"/> Change in marital status  | <input type="checkbox"/> Change job      | <input type="checkbox"/> Need a larger home            |                                     |
| <input type="checkbox"/> Traffic/congestion        |  | <input type="checkbox"/> Other (Please describe _____) |                                     |

# RESIDENTS SURVEY

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## DOWNTOWN BALTIMORE : *Outlook 2012*

If *NO*, which of these following change(s) would cause you to stay in Downtown Baltimore?

(check all that apply)

- Greater variety of housing
- More shopping options
- More job opportunities
- More events/planned activities
- More private school options
- More open spaces/parks
- Improved public schools
- More/improved public transit
- Less crime
- More charter schools
- Other (Please describe \_\_\_\_\_)

23. Please provide the top three types of businesses that you would like to see located or that you want more of located within Downtown Baltimore? (such as grocery stores or restaurants)

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Matthew Kachura, Economic Dev. Research Manager  
410.837.6651 mkachura@ubalt.edu

The Jacob France Institute, University of Baltimore  
1420 North Charles Street, Baltimore, Maryland, 21201-5779