

National Community Preference Survey

2013

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National Association of REALTORS®

***“The Changing Face of America: Where They Want to Live and
How to Plan for It”***

New Partners for Smart Growth Conference

Denver, Colorado

February 14, 2014

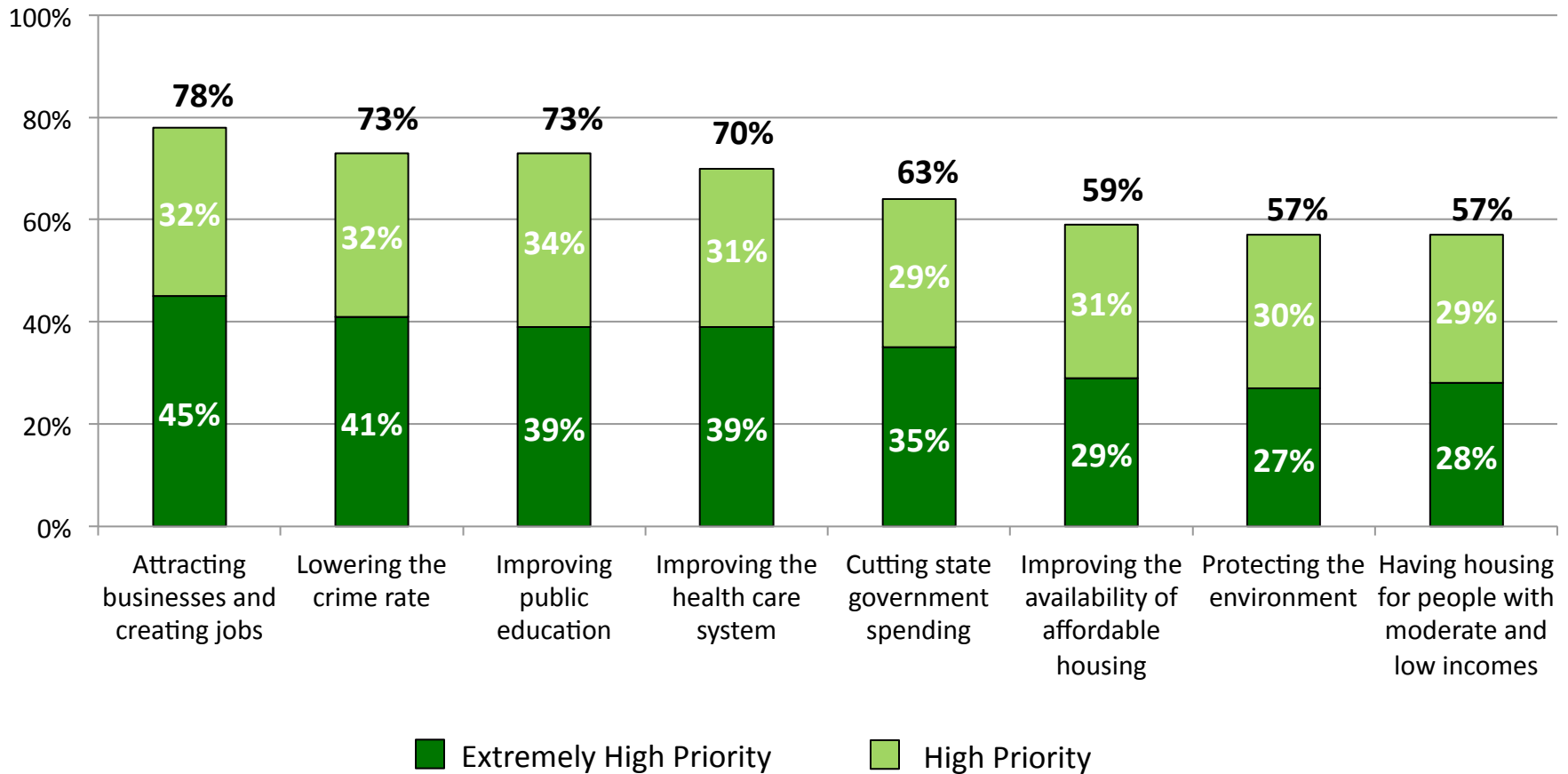
Methodology

American Strategies and Myers Research | Strategic Services, LLC designed and administered this national Internet survey. The survey reached 1,500 adults, 18 years or older. The survey was conducted September 18-24, 2013. Quotas were assigned to reflect the population proportion of each state to the total adult age population across the nation.

Participants were selected from an online panel that consists of over 3.2 million respondents across the United States.

Jobs, Crime, Education and Health Care Top Priorities

Top Priorities for State Government

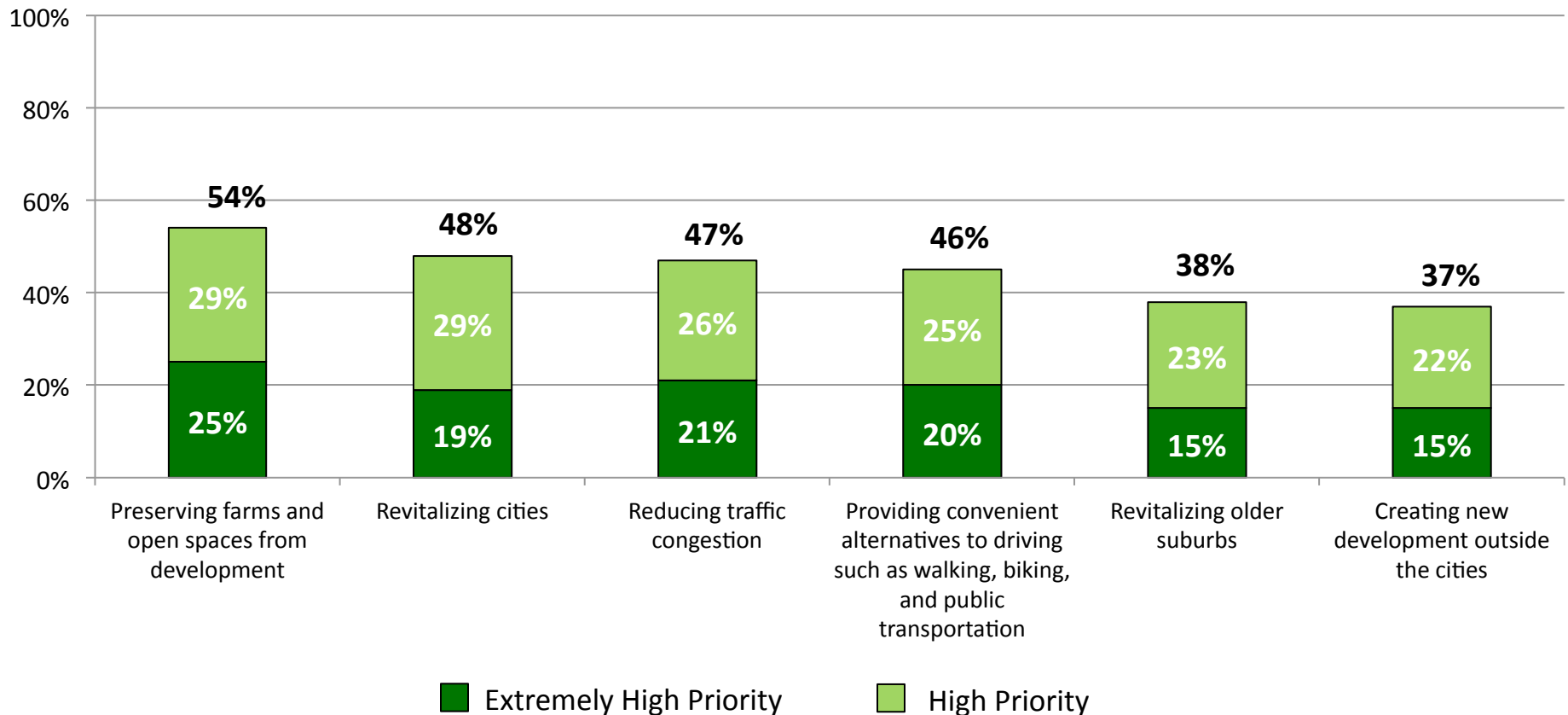


Here are some issues INSERT STATE will be facing over the next few years. For each one please indicate how much of a priority it should be for your state to address: Should it be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for your state government?

Development Issues Rate Lower On Priority List

No single issue dominates agenda

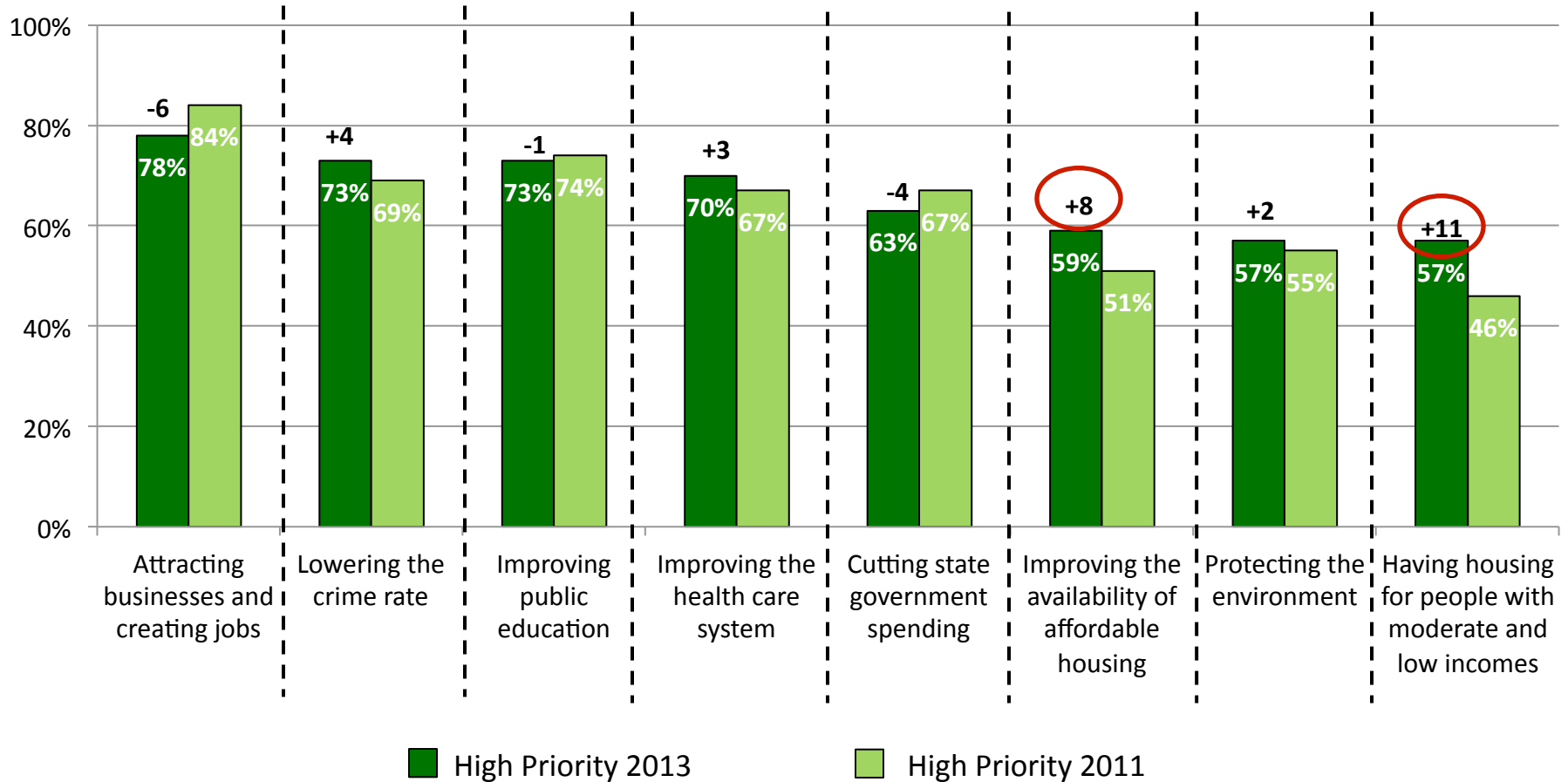
Second Tier Priorities for State Government



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Issue Agenda Mostly Unchanged From 2011, But Stronger Emphasis on Affordable Housing

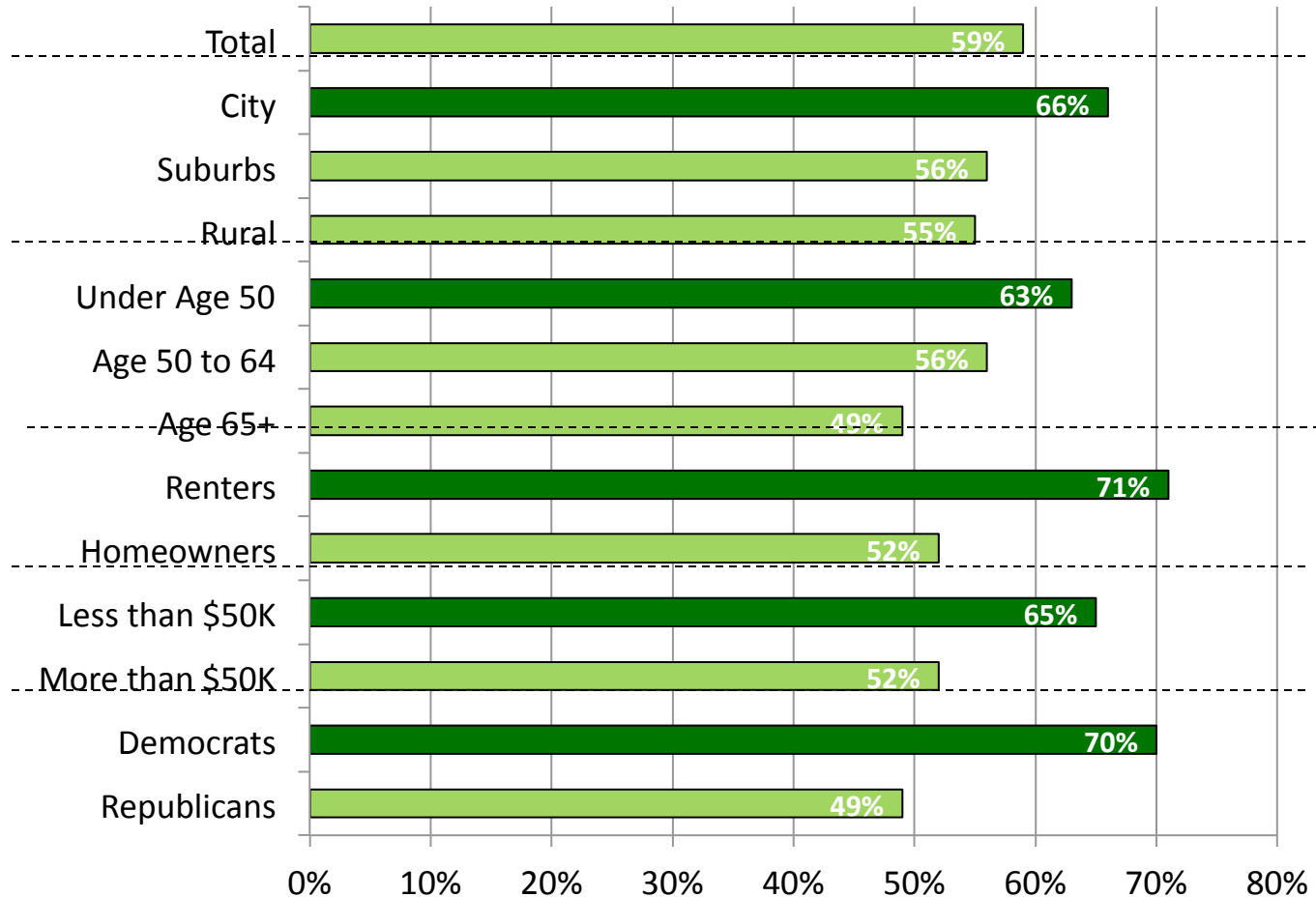
Changes in Top Priorities for State Government



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Urban, Younger and Lower Income Place Higher Priority on Affordable Housing

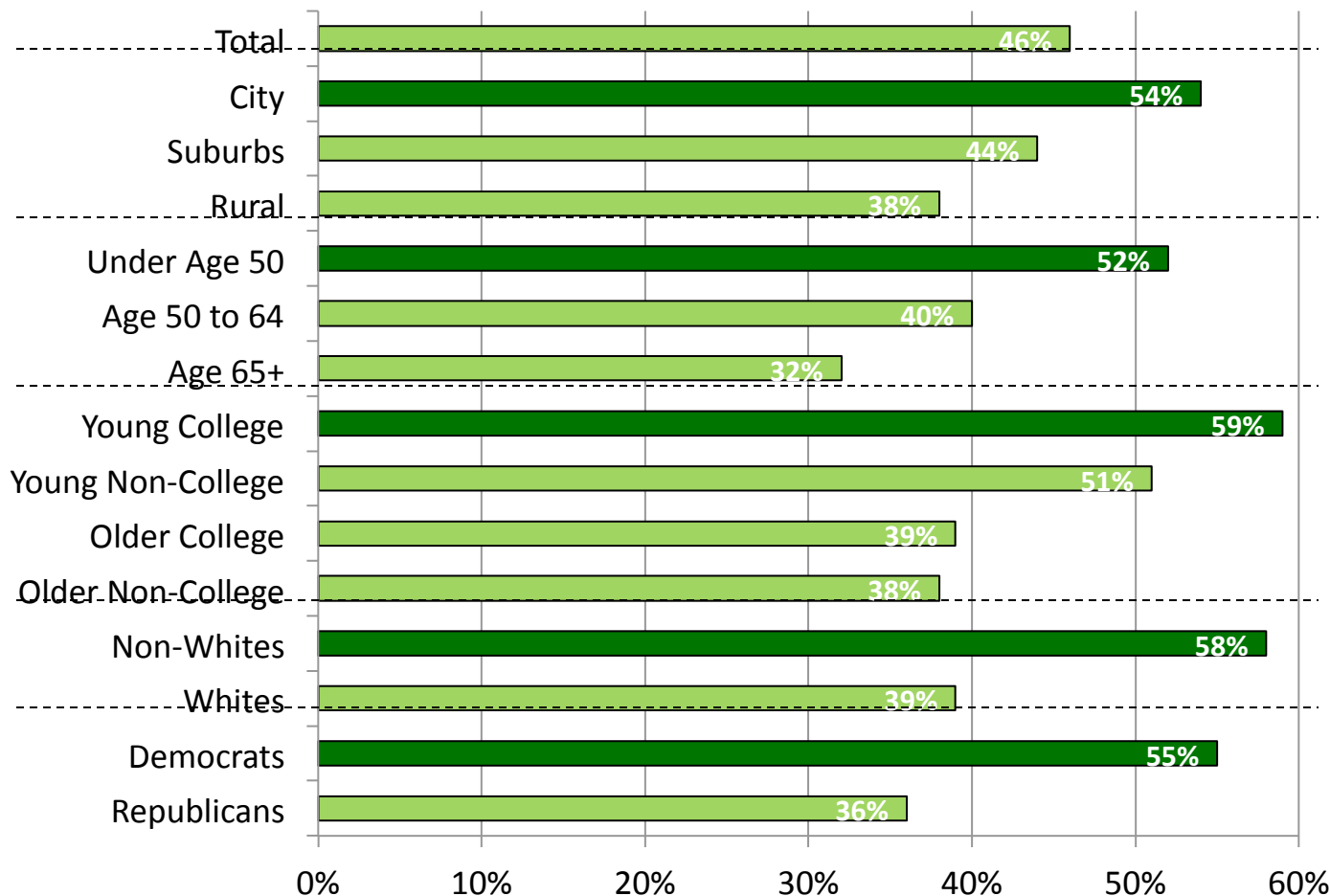
Improving the Availability of Affordable Housing: Percent High Priority by Demographics



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Non-whites, Urban and Younger Americans Place Higher Priority On Alternatives to Driving

Providing Alternatives to Driving: Percent High Priority by Demographics



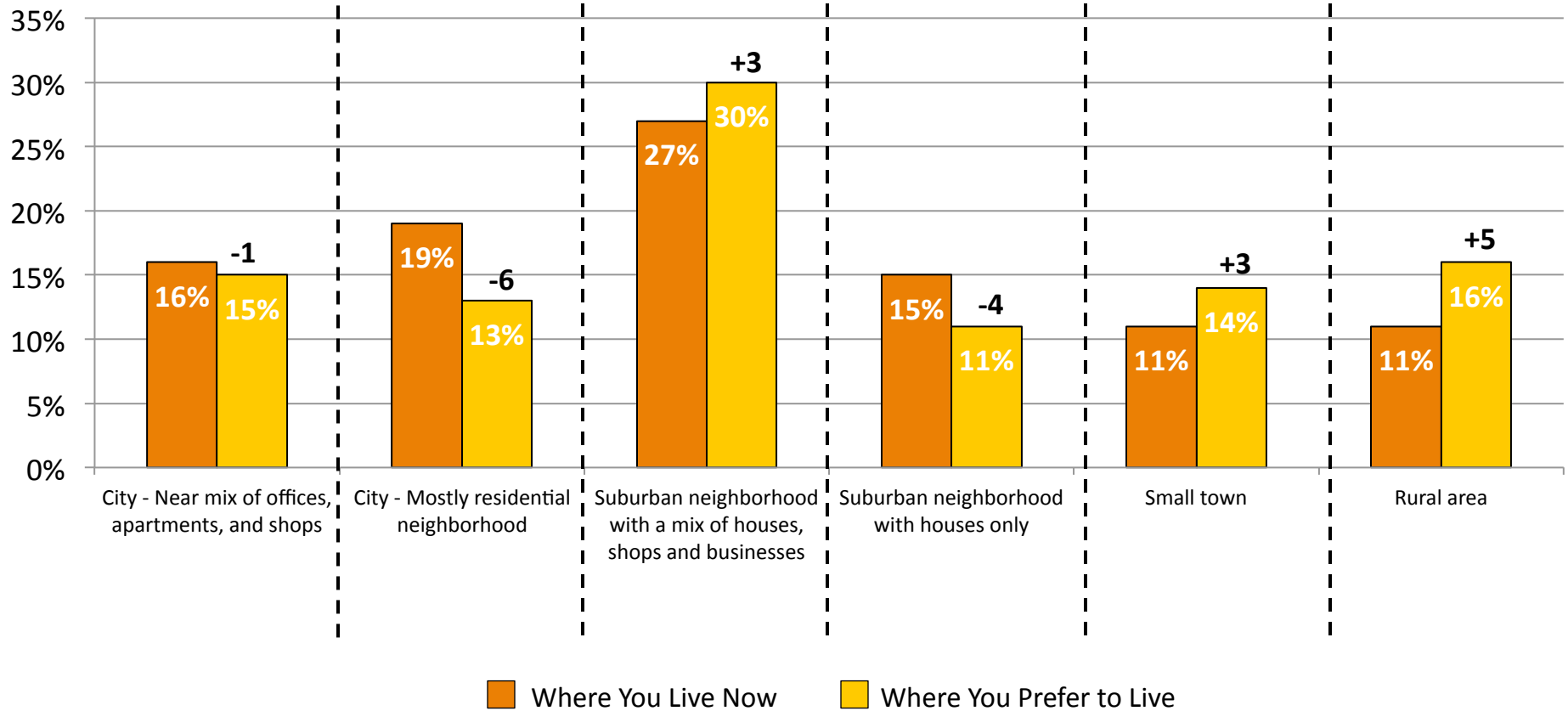
Here are some issues INSERT STATE will be facing over the next few years. For each one please indicate how much of a priority it should be for your state to address: Should it be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for your state government?

Current Living Environment

Plurality Prefers Urban or Suburban Mixed Use Community Over Mostly Residential Communities

More say they would like to live in a small town or rural area than actually do

Area Where You Currently Live v. Area Where You Prefer to Live

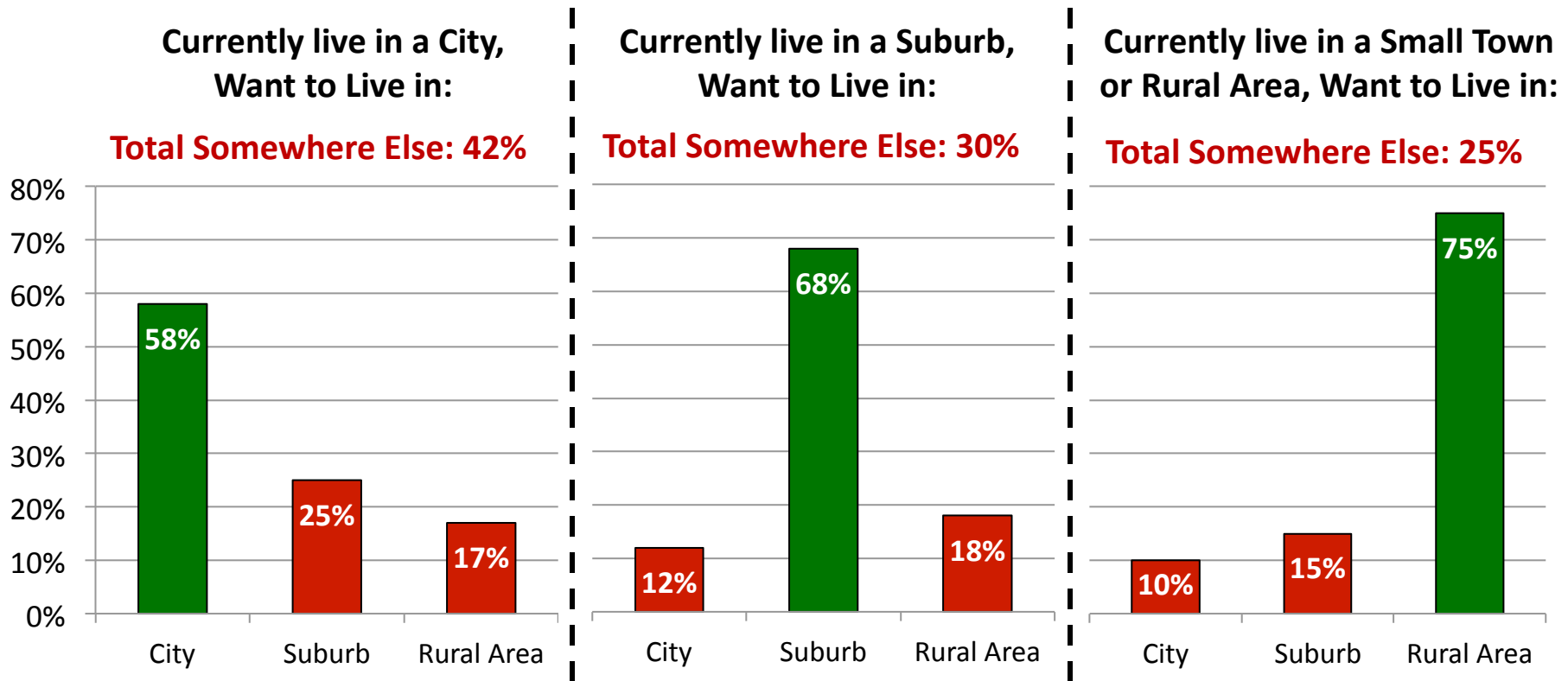


On a different topic, which of the following best describes the place where you live:
 If you could choose where to live, in which type of the following locations would you most like to live?

A Majority of Residents are Living in the Type of Area Where They Say They Would Most Like to Live

Small town and rural residents are especially content.

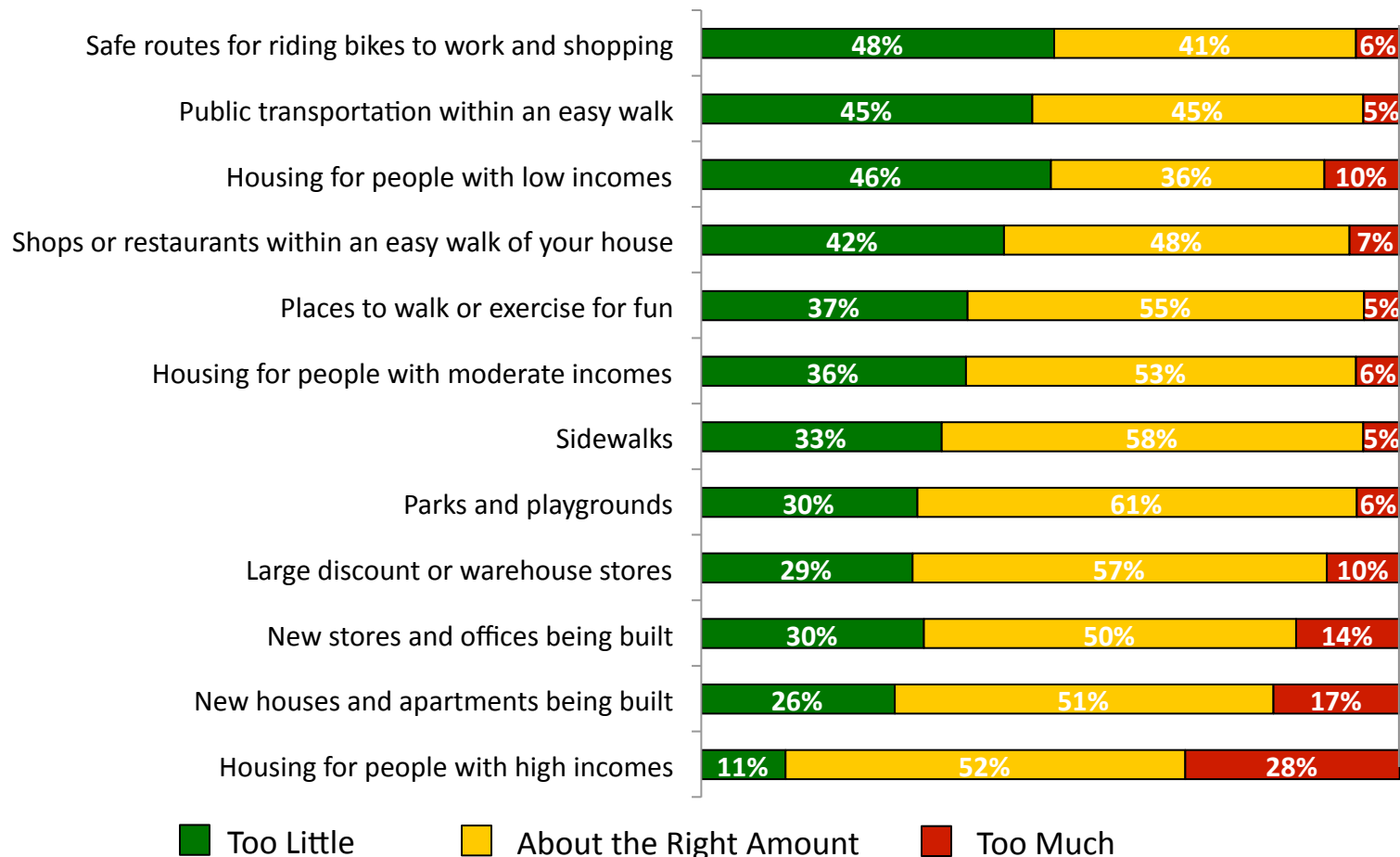
Area Where You Currently Live v. Area Where You Prefer to Live



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Amenities Mostly Available, But Many Lack Access to Bike Routes, Transit, Housing and Places to Walk

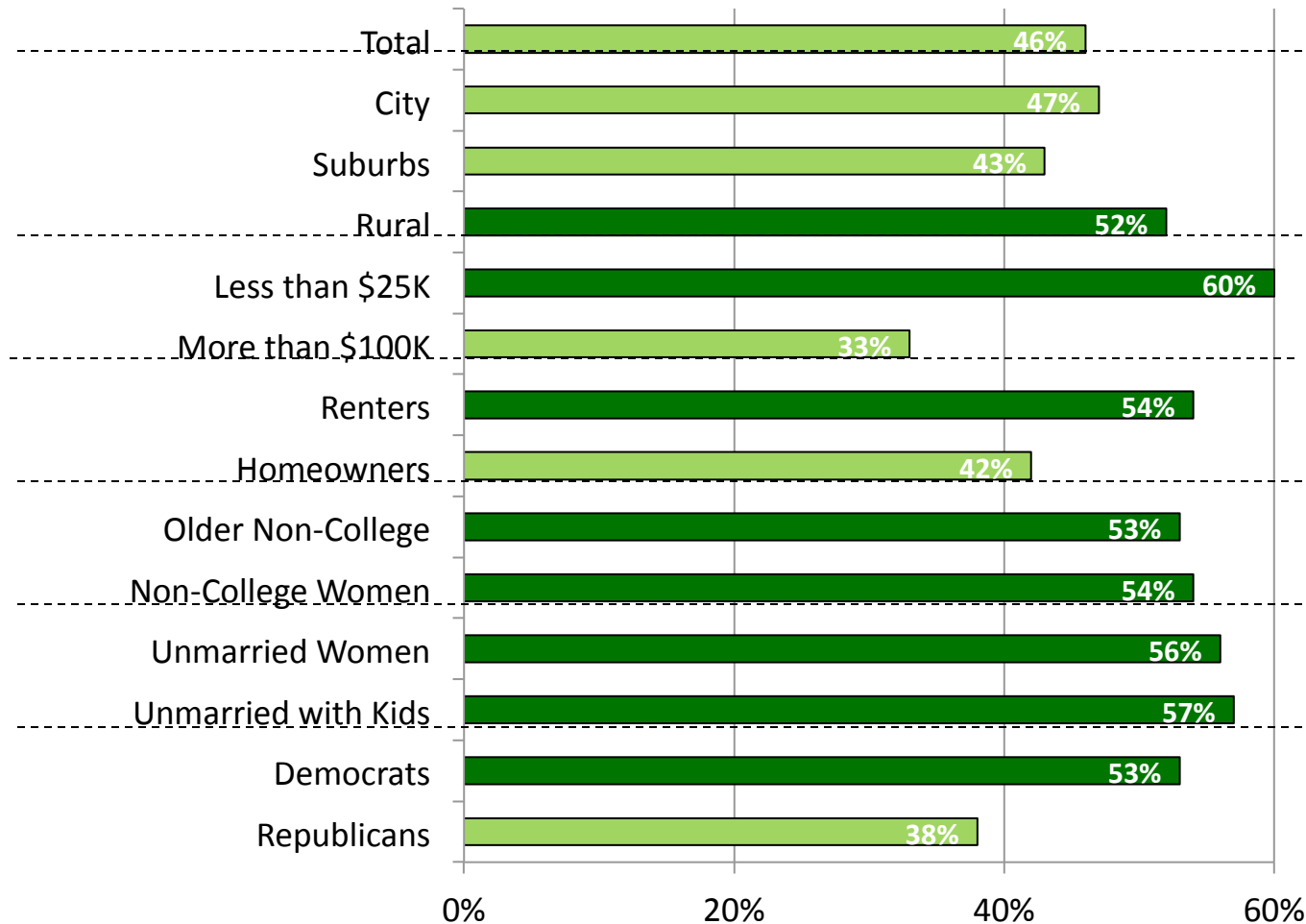
Too Little, Right Amount, or Too Much in the Area Where You Live



Do you think there is too much, too little, or the right amount of each of the following in the area close to where you live?

Lack of Affordable Housing Especially Acute Among Low Income, Renters, Unmarried and Rural Households

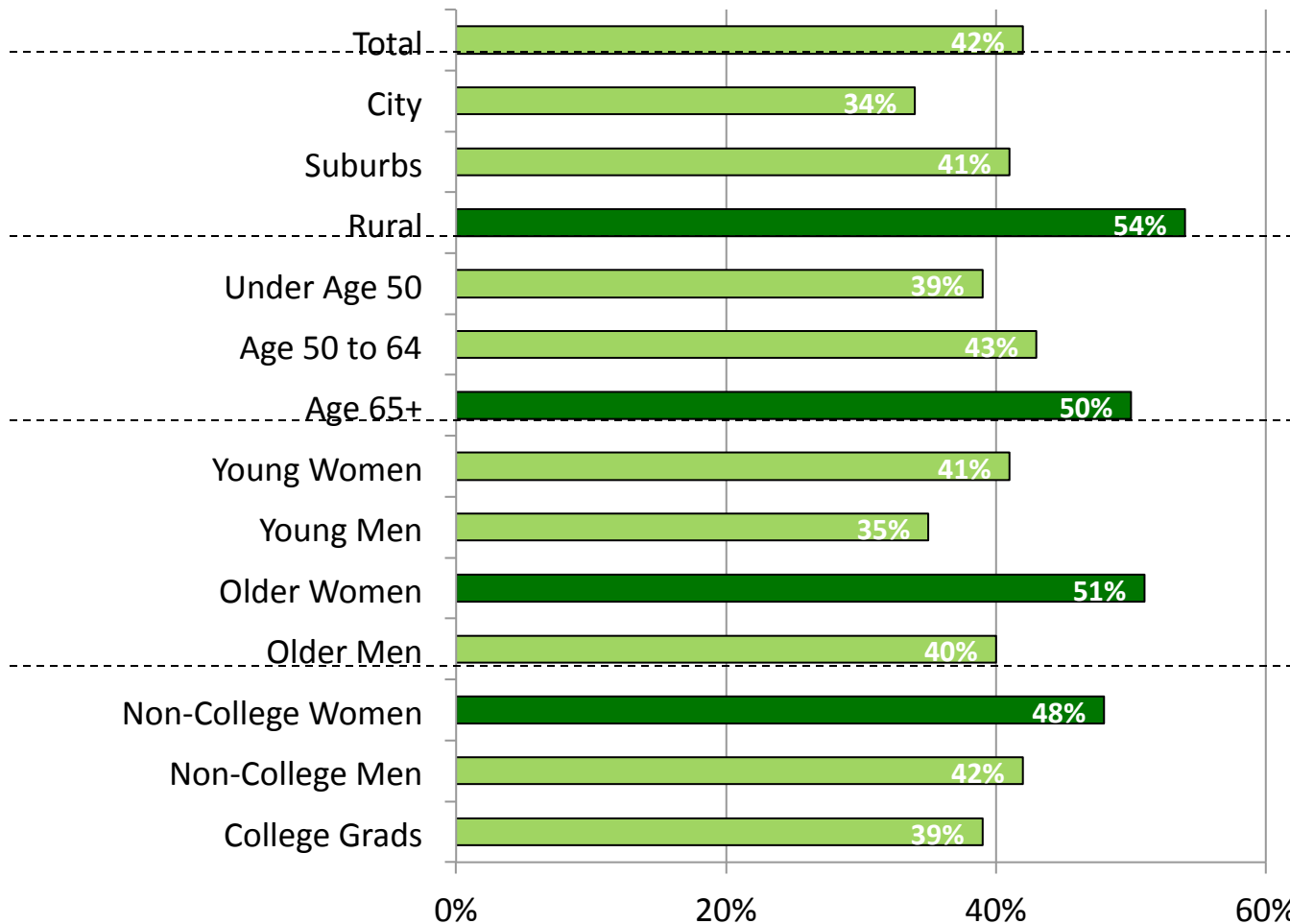
Too Little Housing for People with Low Incomes



Do you think there is too much, too little, or the right amount of each of the following in the area close to where you live?

Older and Rural Homes Note Lack of Shops and Restaurants

Too Little Shops or Restaurants Within an Easy Walk of Your House

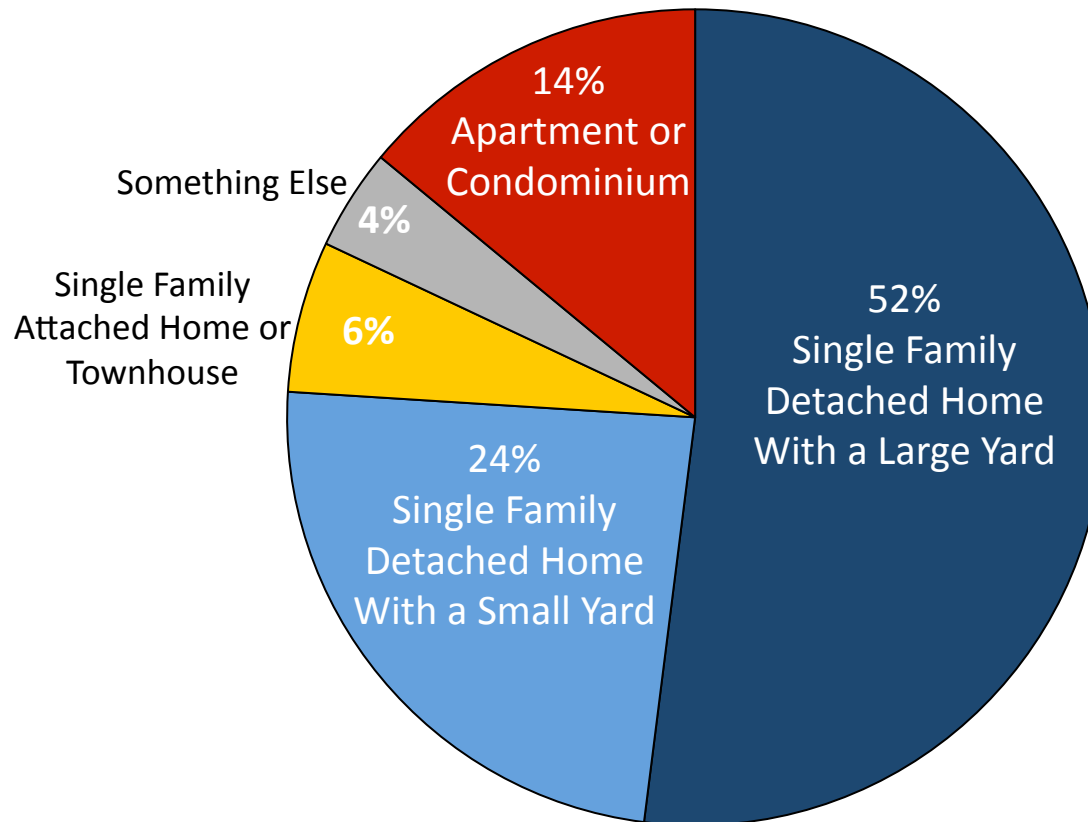


Do you think there is too much, too little, or the right amount of each of the following in the area close to where you live?

Ideal Community

American's Overwhelmingly Prefer To Live In A Detached Home

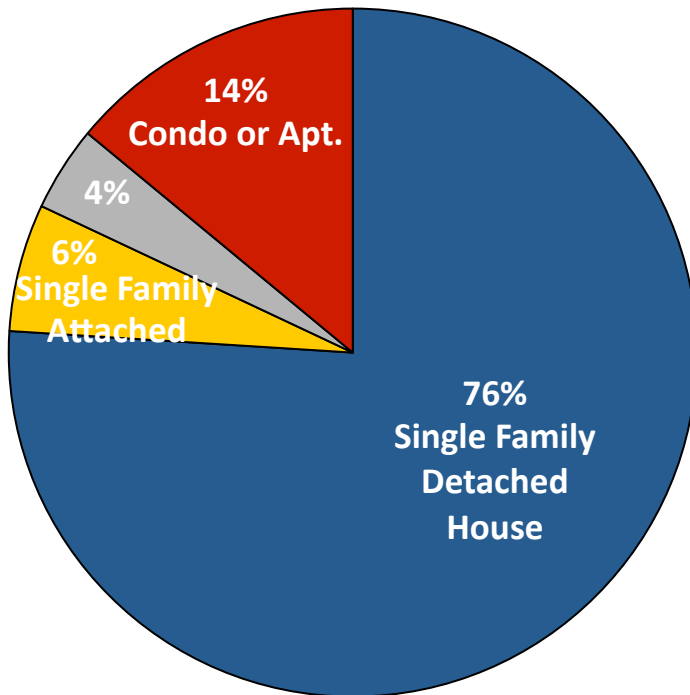
Housing Type Preference:



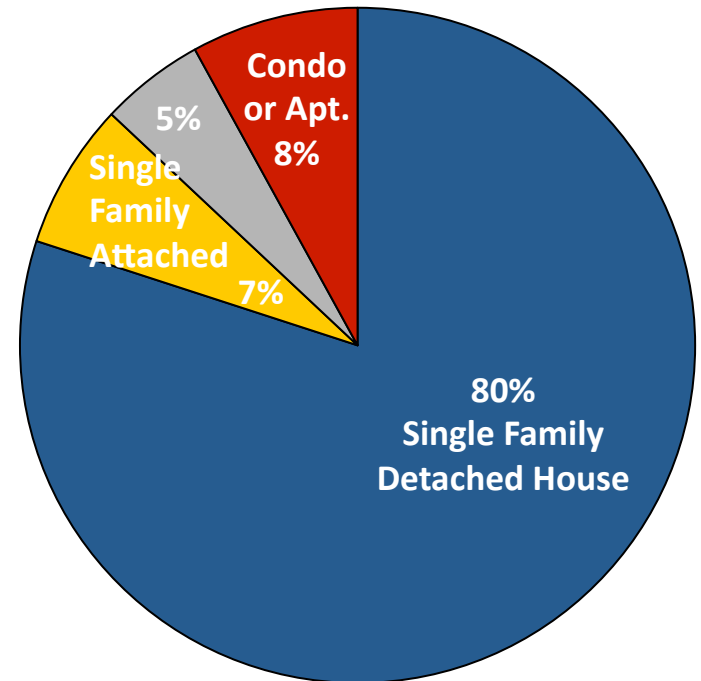
Right now, if you could choose, which of the following would you prefer to live in:

Slightly More Preference For Condo or Apartment Living Than In 2011

Housing Type Preference (2013):



Housing Type Preference (2011):



Right now, if you could choose, which of the following would you prefer to live in:

Walking and Commute Time Key to Community Preference, But Detached House Trumps All

Preferred Community:

The neighborhood has a mix of houses and stores and other businesses that are easy to walk to.



The neighborhood has houses only and you have to drive to stores and other businesses.

Houses with smaller yards and you would have a shorter commute to work.



Houses with larger yards and you would have a longer commute to work.

Houses with small yards and it is easy to walk to schools, stores and restaurants.



Houses with large yards and you have to drive to get to schools, stores and restaurants.

Houses with small yards and it is easy to walk to parks, playgrounds, and recreation areas.



Houses with large yards and you have to drive to get to parks, playgrounds, and recreation areas.

Own or rent an apartment or townhouse, and have an easy walk to shops and restaurants and have a shorter commute to work.



Own or rent a detached, single-family house, and have to drive to shops and restaurants and have a longer commute to work.

Please select the community where you would prefer to live:

Mixed Use Community v. Conventional Suburban Community

Americans Split on Preference Between Walkable, Mixed-Use Community and Conventional Suburban Community

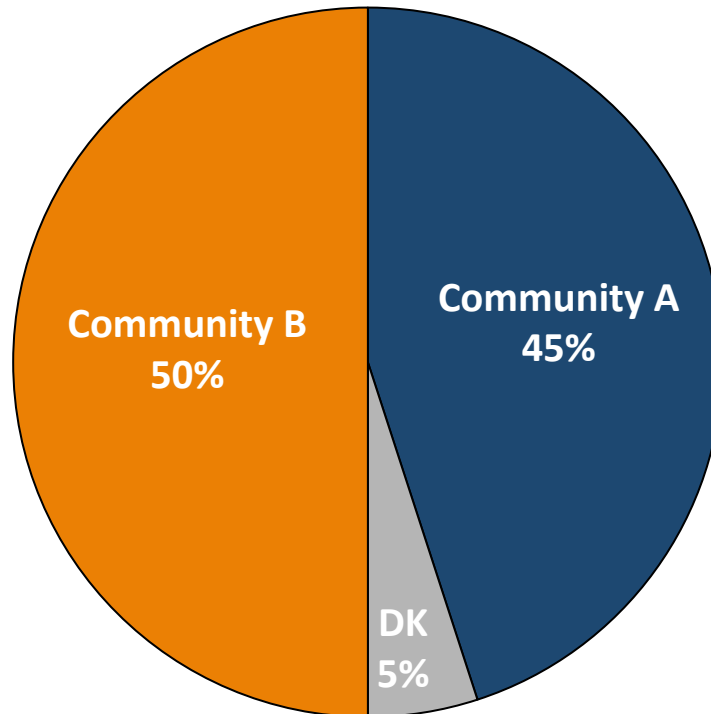
Preferred Community:

Community B

(Walkable Community):

There is a mix of single-family detached houses, townhouses, apartments and condominiums.

Places such as shopping, restaurants, a library, and a school are within a few blocks of your home and you can either walk or drive. Parking is limited when you decide to drive to local stores, restaurants and other places. Public transportation, such as bus, subway, light rail, or commuter rail, is nearby.



Community A

(Conventional Suburb):

There are only single-family houses. Places such as shopping, restaurants, a library, and a school are within a few miles of your home and you have to drive to most. There is enough parking when you drive to local stores, restaurants and other places. Public transportation, such as bus, subway, light rail, or commuter rail, is distant or unavailable.

Please read the two descriptions below and answer the following questions. Assume that the quality of the schools, crime rates, and cost of house are exactly the same in the two communities:

Going deeper in the data...

Community B (Walkable Community):

There is a mix of single-family detached houses, townhouses, apartments and condominiums. Places such as shopping, restaurants, a library, and a school are within a few blocks of your home and you can either walk or drive. Parking is limited when you decide to drive to local stores, restaurants and other places. Public transportation, such as bus, subway, light rail, or commuter rail, is nearby.

Total net (+5 Community B, 50 to 45 percent)

- Post grads (+21)
- Recent movers (+20)
- Prospective movers (+18)
- Unmarried women (+18)
- Unmarried with kids (+18)
 - Single (+17)
- City dwellers (+16)
- College men (+15)
- African Americans (+15)
 - Democrats (+13)
- Ages 30 to 39 (+13)
- Young college (+13)

Community A (Conventional Suburb):

There are only single-family houses. Places such as shopping, restaurants, a library, and a school are within a few miles of your home and you have to drive to most. There is enough parking when you drive to local stores, restaurants and other places. Public transportation, such as bus, subway, light rail, or commuter rail, is distant or unavailable.

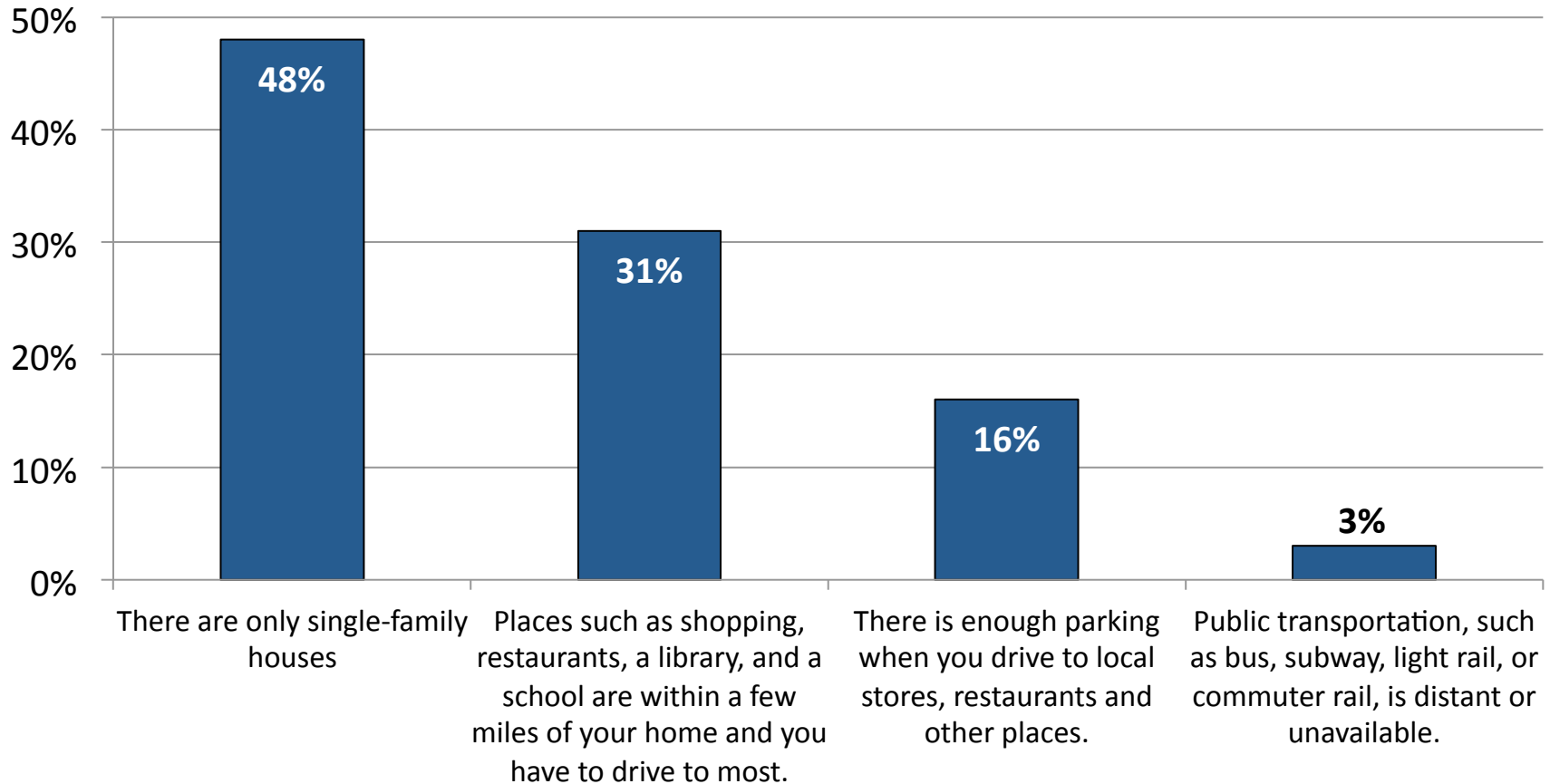
Total net (-5 Community A, 45 to 50 percent)

- Rural/small town (+21)
- Republicans (+12)
- Homeowners (+10)
- Married women (+11)
- Married with kids (+10)
 - Moms (+5)
- Midwest (+3)
- Married no kids (+4)
- \$50K-\$100K (+3)

Please read the two descriptions below and answer the following questions. Assume that the quality of the schools, crime rates, and cost of house are exactly the same in the two communities:

“Single Family Homes Only” Most Appealing To Those Who Prefer Conventional Suburban Community

Most Appealing Characteristic for People Who Prefer a Conventional Suburban Community:

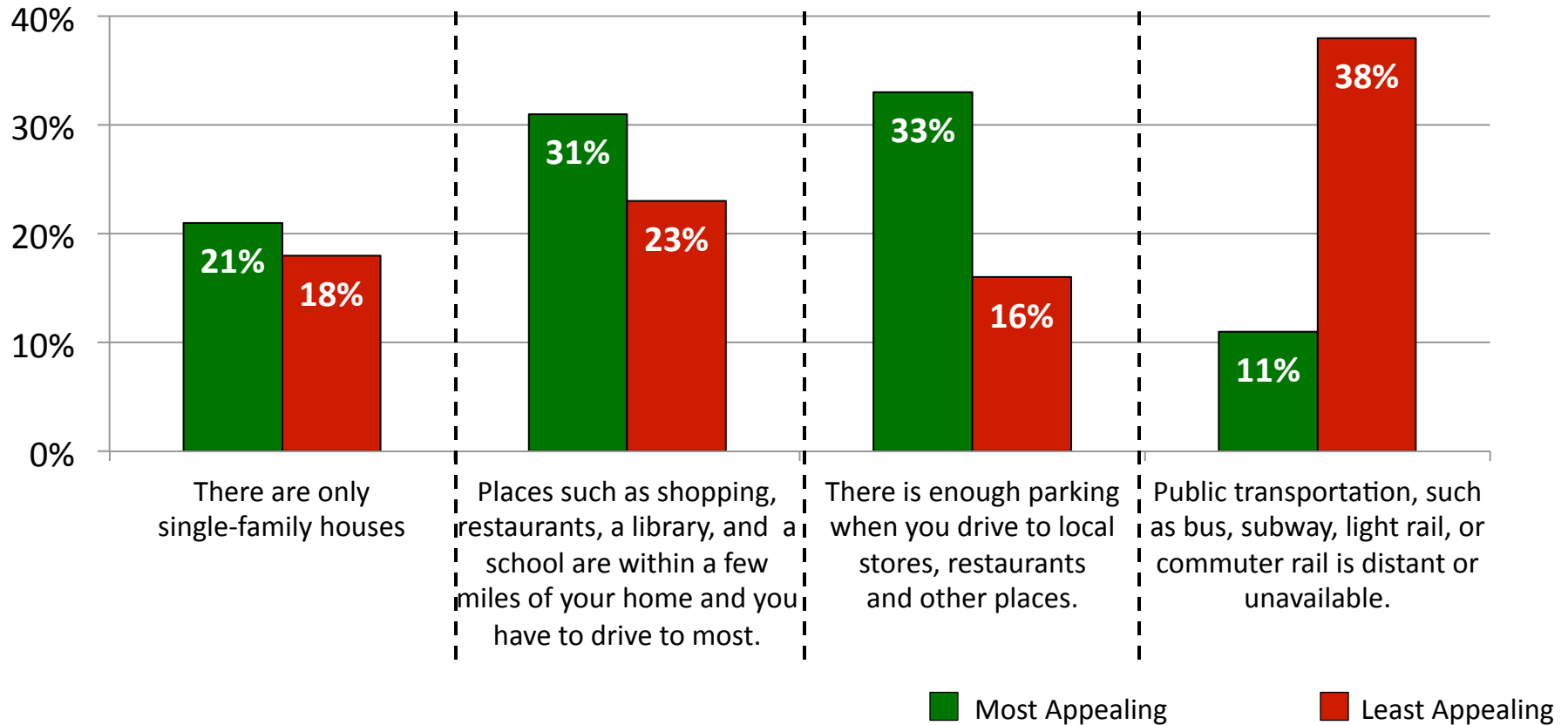


(IF COMMUNITY A) Look at the community you selected and choose the ONE most appealing characteristic of that community for you.

Parking and Proximity of Suburbs Has Some Appeal to Those Who Prefer Mixed Use Community

Lack of public transportation least appealing

What “Walkable” Americans Like/Dislike About Conventional Suburban Communities:

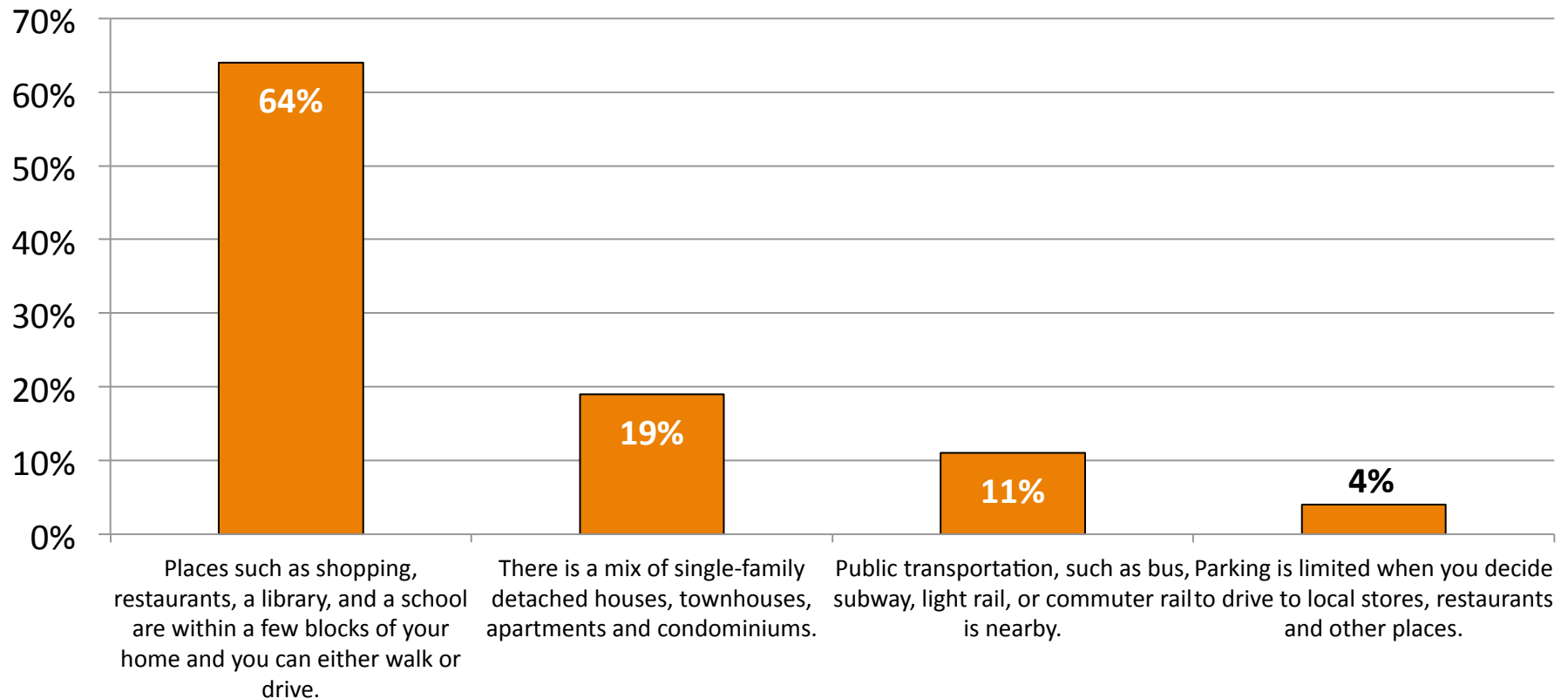


(IF COMMUNITY B) Looking at the community you did NOT select, choose the ONE most appealing characteristic of that community you would like to have from that list.

(IF COMMUNITY B) Looking at the community you did NOT select, choose the ONE LEAST appealing characteristic of that community.

Proximity of Commerce and Public Amenities Most Appealing to Those Who Prefer Mixed Use Community

Most Appealing Characteristic for People Who Prefer a Walkable Community:

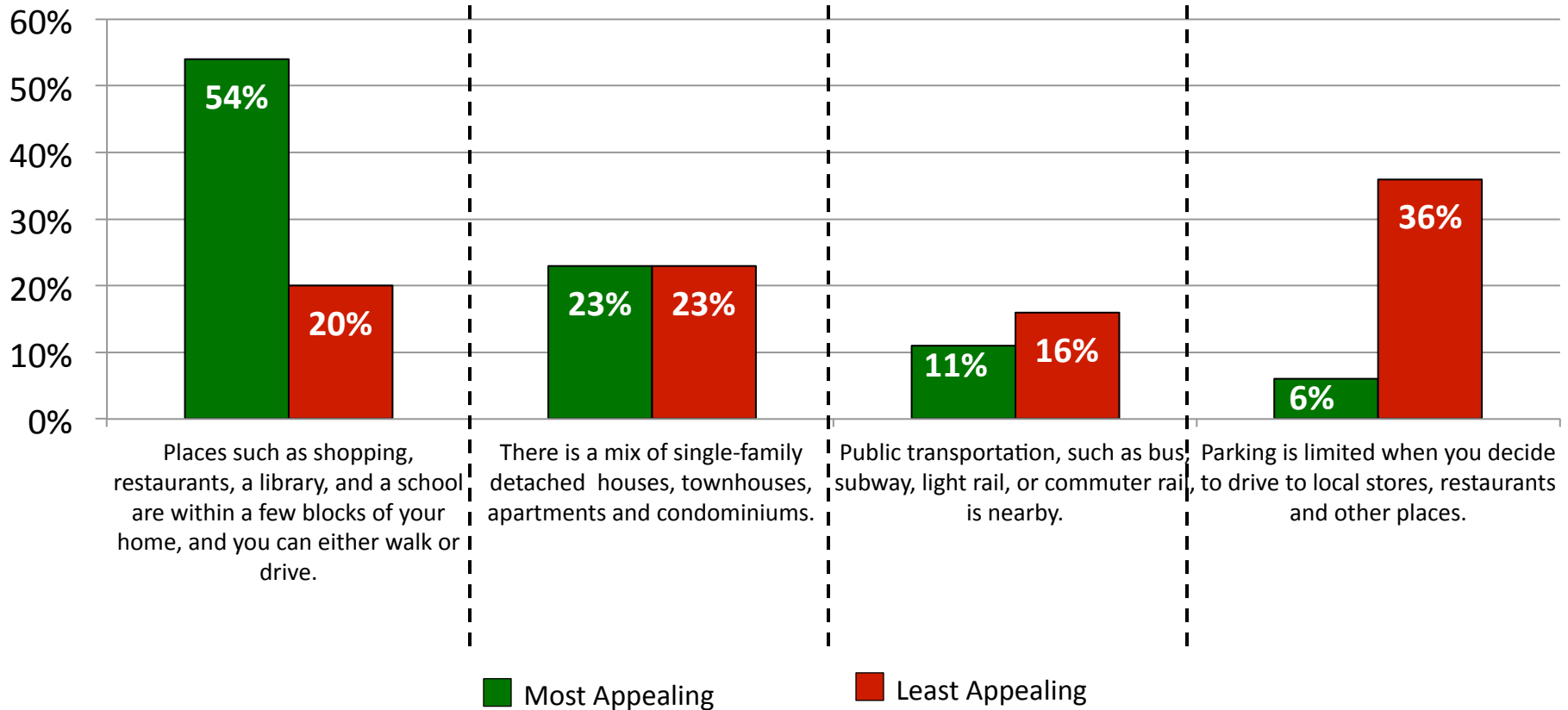


(IF COMMUNITY B) Look at the community you selected and choose the ONE most appealing characteristic of that community for you.

Convenience of Walkable Areas Also Appealing To Those Who Prefer Conventional Suburbs

Limited parking is top drawback

What Conventional Suburban Americans Like/Dislike About “Walkable” Communities:



(IF COMMUNITY A) Looking at the community you did NOT select, choose the ONE most appealing characteristic of that community you would like to have from that list.

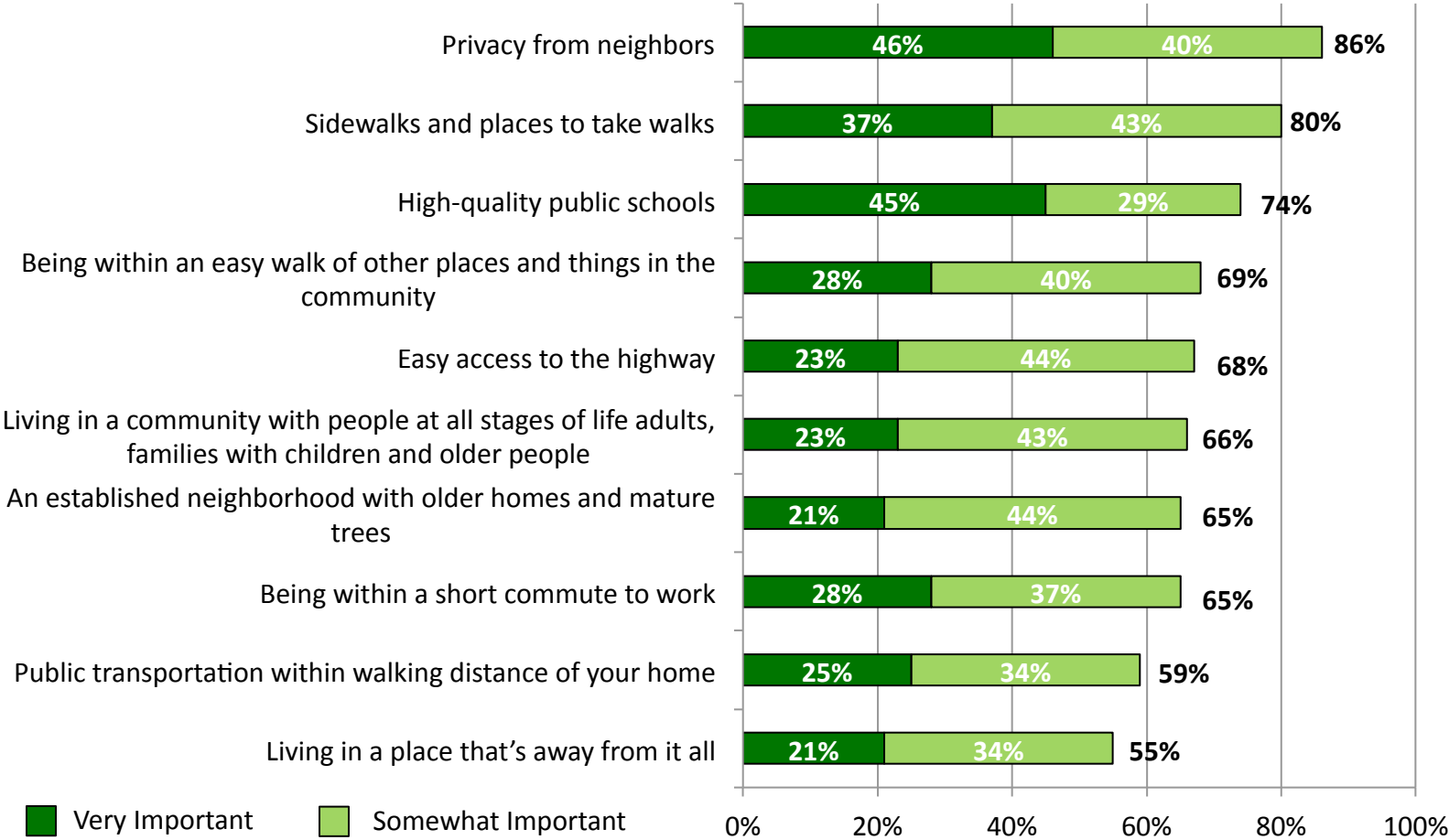
(IF SOMMUNITY A) Looking at the community you did NOT select, choose the ONE LEAST appealing characteristic of that community.

What's Important in Deciding Where to Live

Privacy, Walkability, Schools

Most Important in Deciding Where to Live

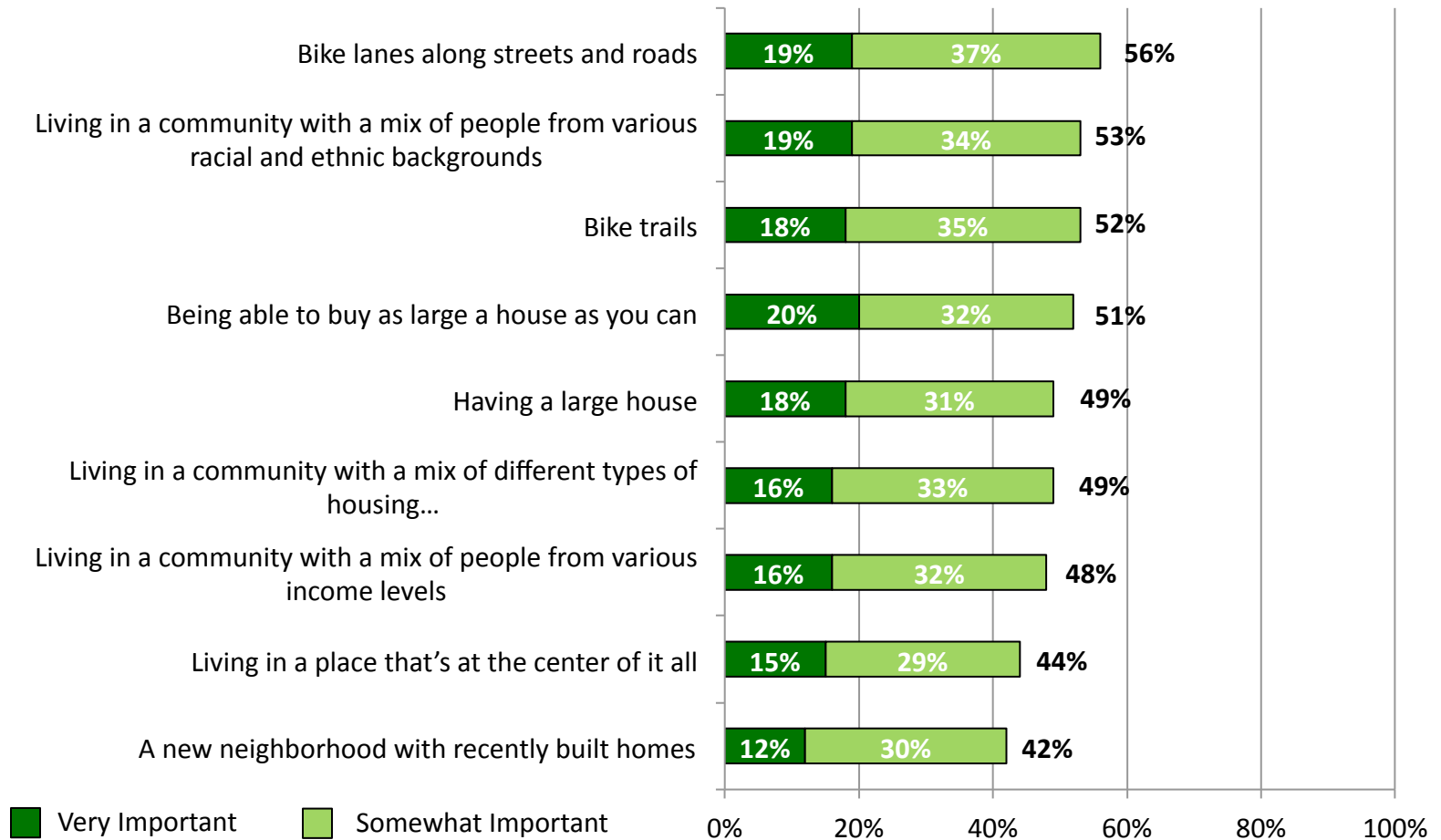
Most Important Factors in Deciding Where to Live:



In deciding where to live, indicate how important having each of the following would be to you: very important, somewhat important, not very important, or not at all important.

No Single Factor Dominates Second Tier List

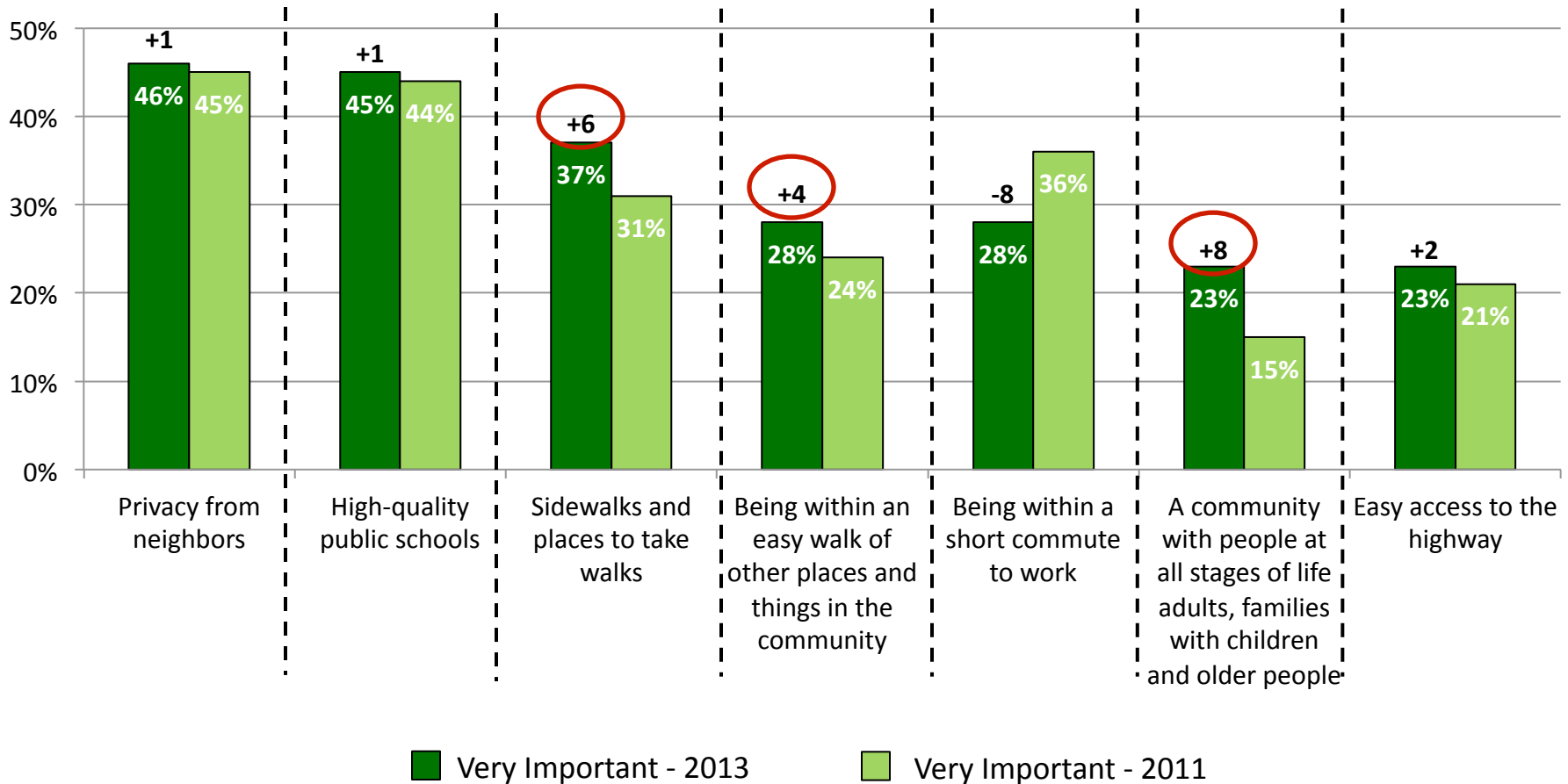
Less Important Factors in Deciding Where to Live:



In deciding where to live, indicate how important having each of the following would be to you: very important, somewhat important, not very important, or not at all important.

Walkability and Age-Diversity Gaining in Importance

Changes in Important Factors in Deciding Where to Live

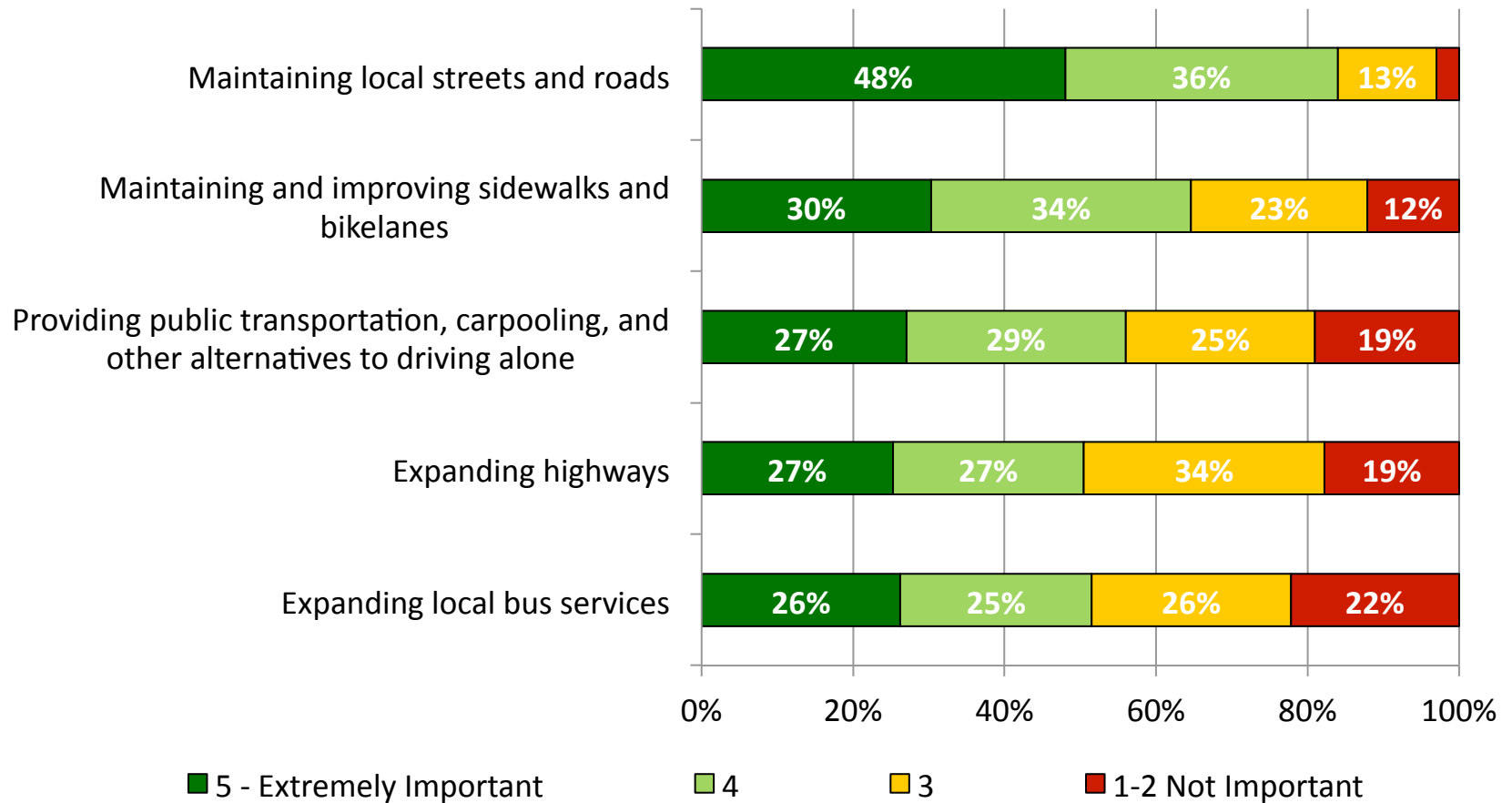


Q.47 In deciding where to live, indicate how important having each of the following would be to you: very important, somewhat important, not very important, or not at all important.

Transit and Transportation

Road Maintenance Key To Improving Quality of Life

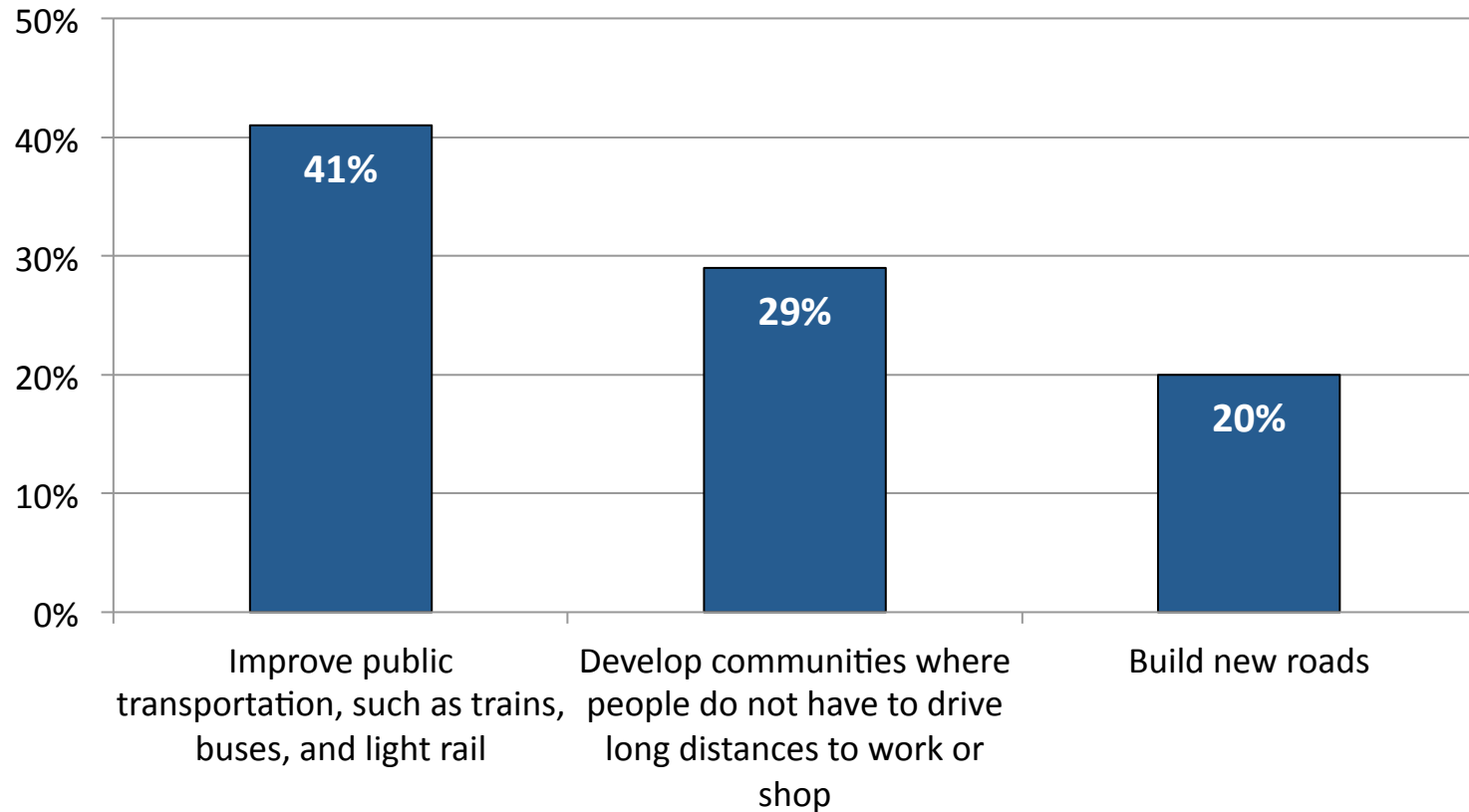
Importance for Improving the Quality of Life in the Area Where You Live (1 to 5 Scale)



Switching topics and thinking about traffic and transportation. Please rate the importance of each of the following in improving the quality of life in the area where you live. Use a scale from 1 to 5, where 1 means not important at all and 5 means extremely important.

Better Public Transit Best Solution To Reducing Traffic

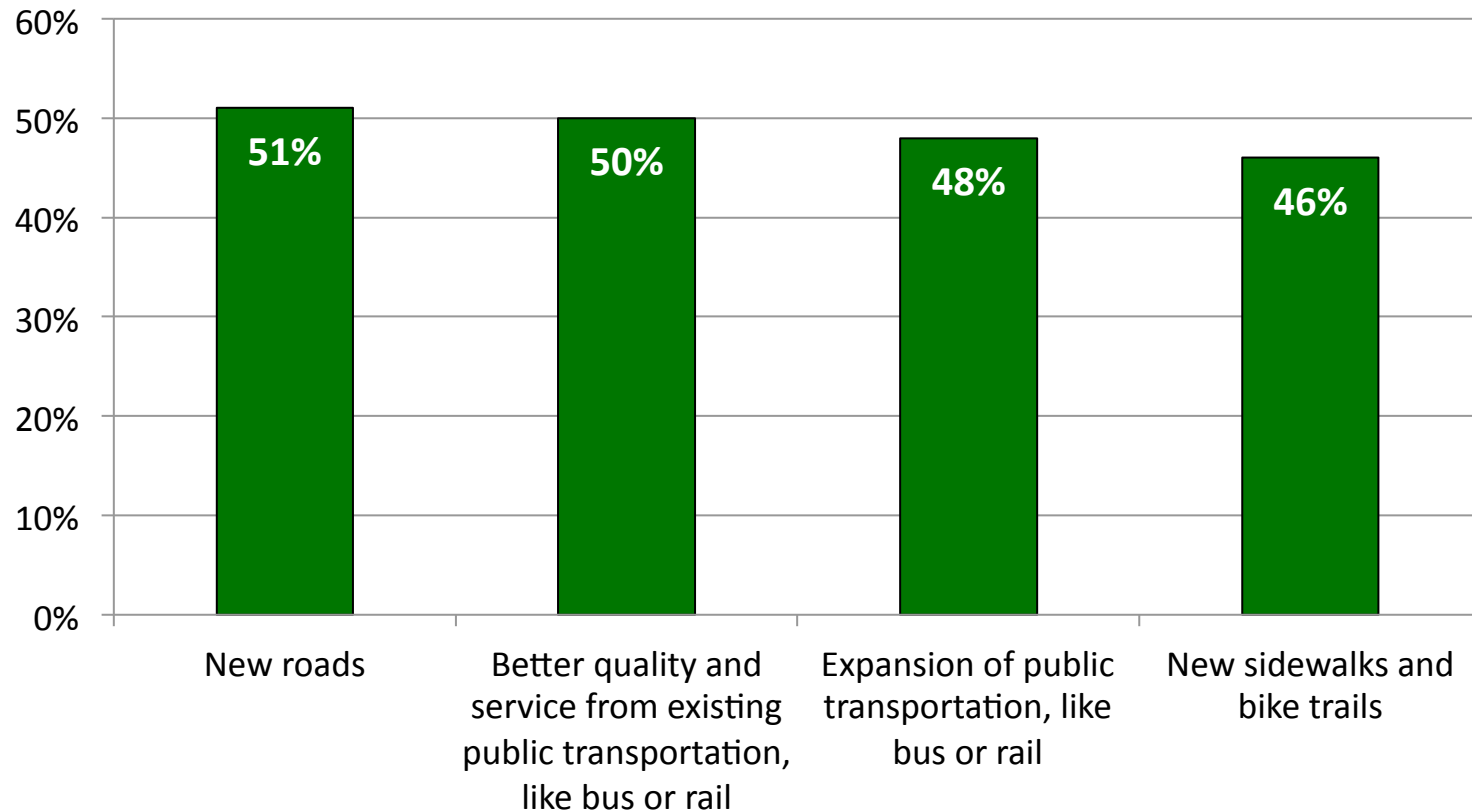
Proposals for Long Term Solution to Reducing Traffic and Improving Transportation in Your State:



Which of the following proposals is the best long term solution to reducing traffic and improving transportation in your state:

About Half Say They Are Willing to Pay More in Taxes To Fund Transportation Options

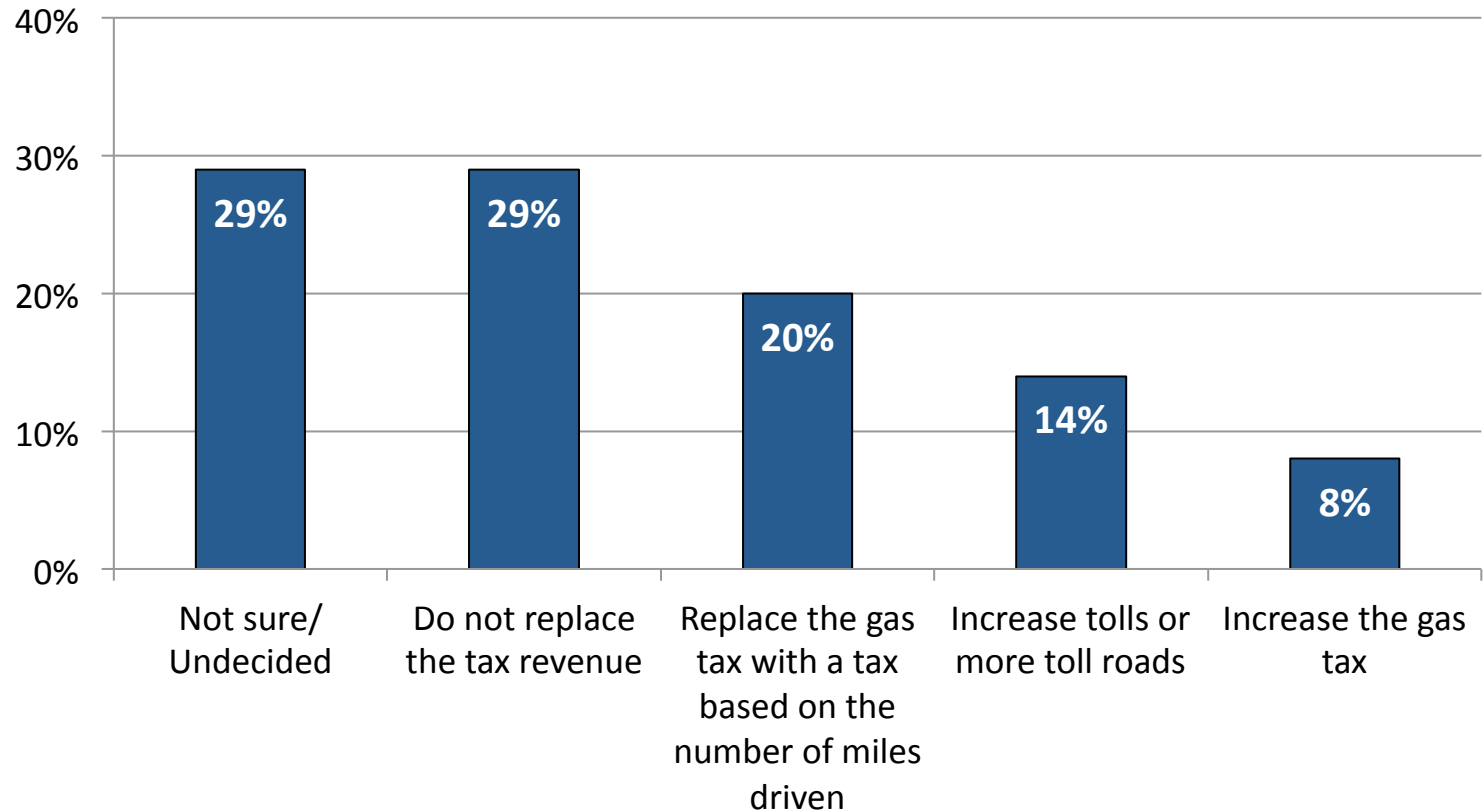
Willing to Pay a Little More in Taxes to Fund:



Still thinking about transportation and transit options, would you be willing to pay a little more in taxes to fund each of the following?

No Preferred Alternative to Replacing Lost Gas Tax Revenue

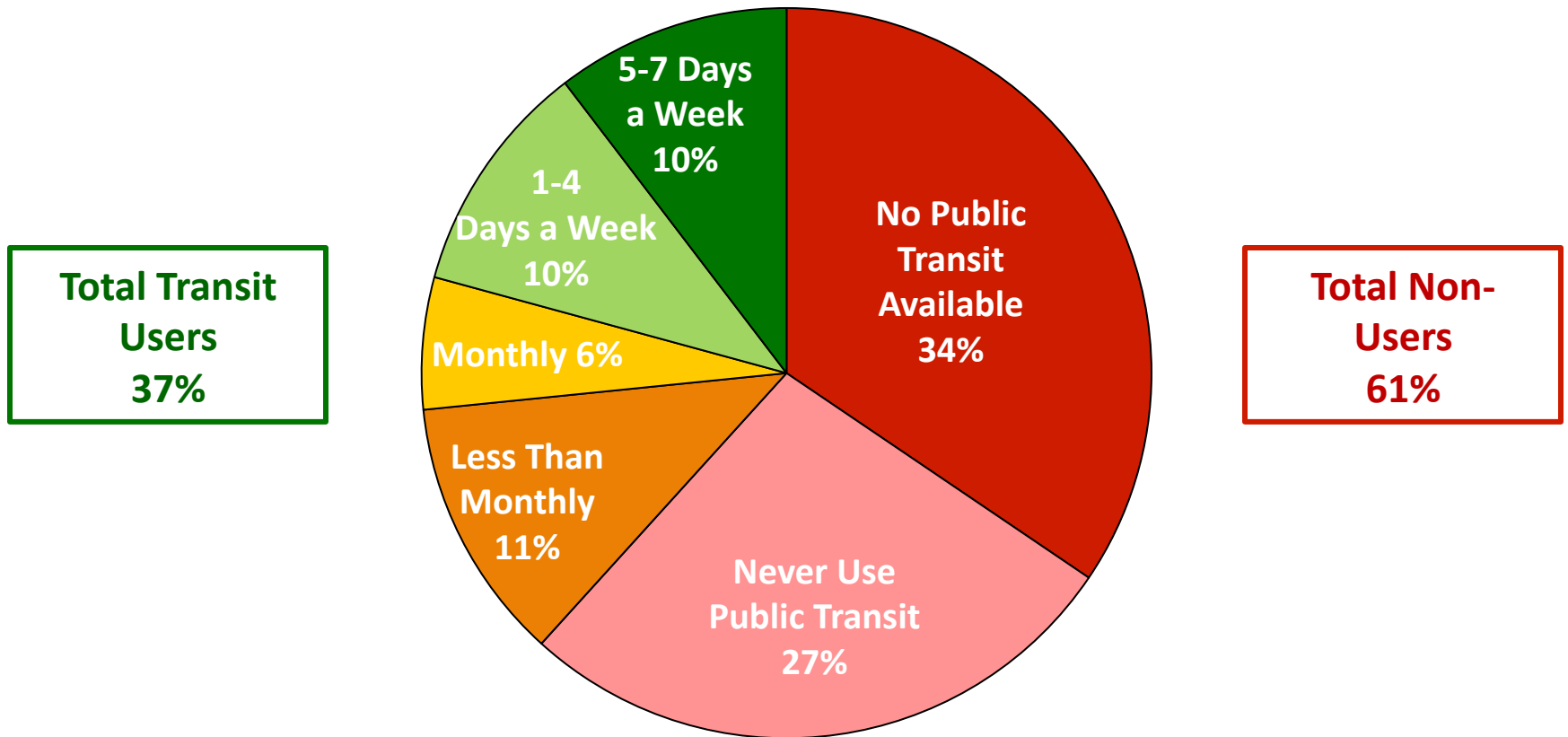
Proposals to Replace Gas-Tax Funding to Support Roads:



Increased fuel efficiency in cars has resulted in less gas-tax funding to support roads.
Which of the following approaches would you take to replace the tax revenue?

One-Quarter Uses Public Transit At Least Once a Month

Public Transportation Use:

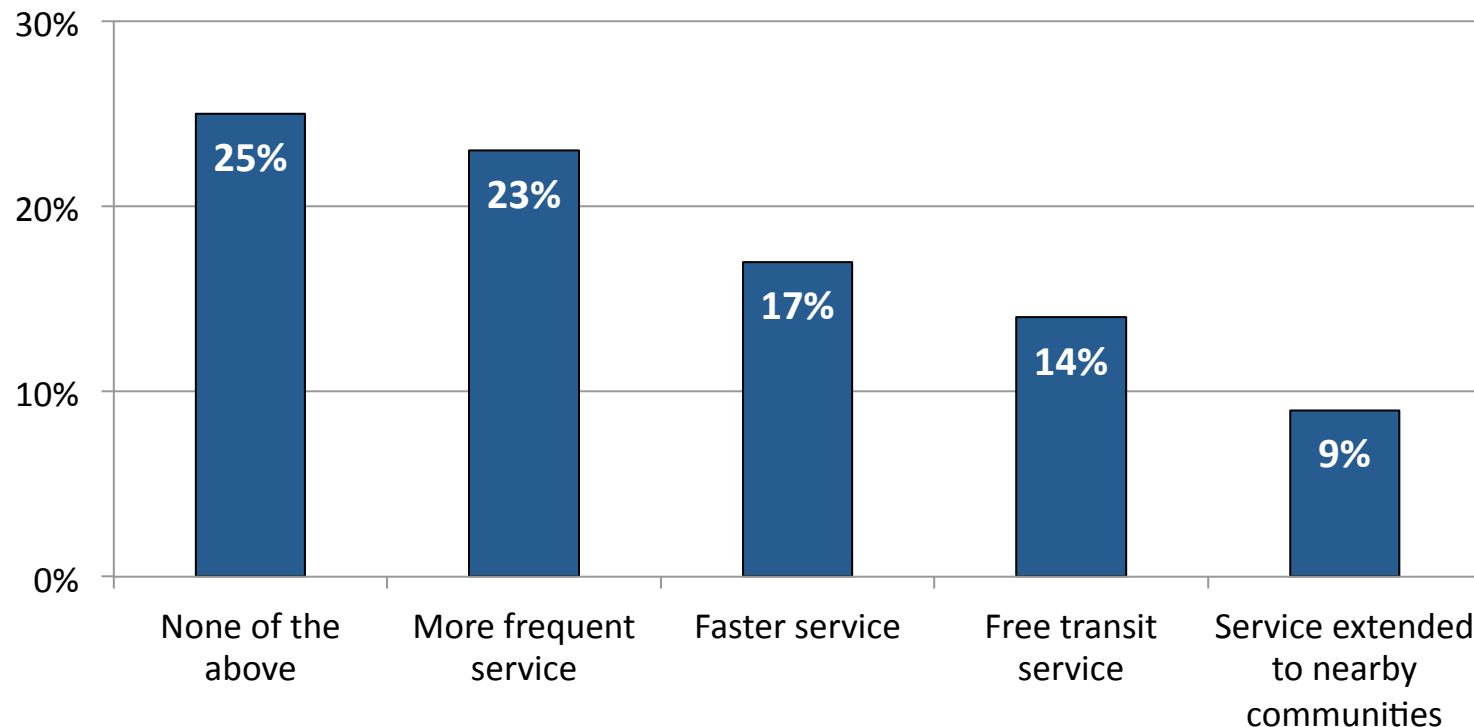


Is there public transportation, like bus, a subway, or rail, available to you where you live?
(IF YES IN TRANSIT) How often would you say you use the public transit in your area?

More Frequent and Faster Service Could Attract More Public Transit Use

But plurality unpersuaded by any option

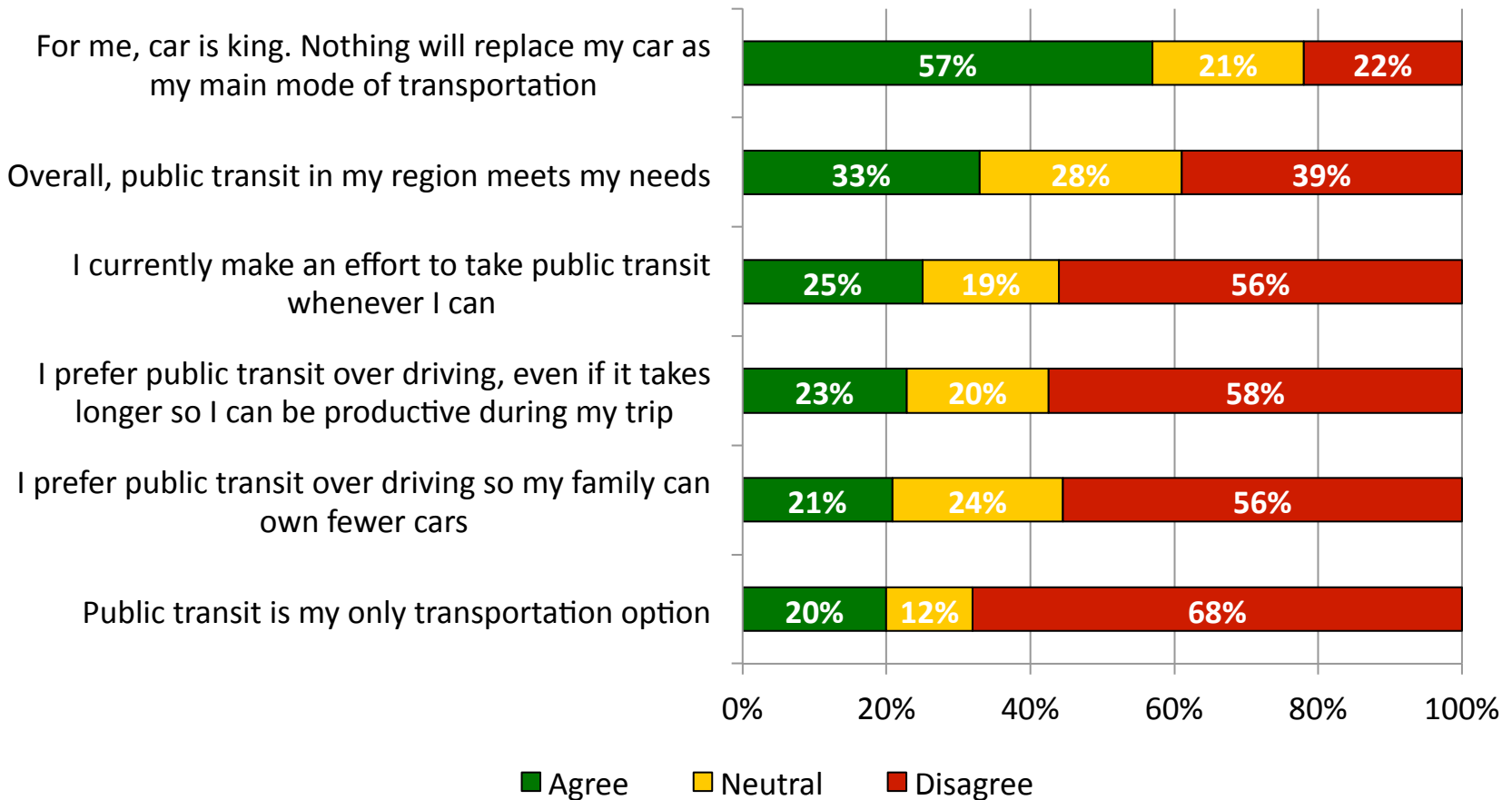
Encourage Greater Use of Transit Service:



(IF USE PUBLIC TRANSIT LESS THAN 6-7 TIMES A WEEK) Which of the following would encourage you to make greater use of transit service?
Please check all that apply.

Car Is Still King In Areas Where Public Transportation is Available

Agree/Disagree with Public Transit Statements:

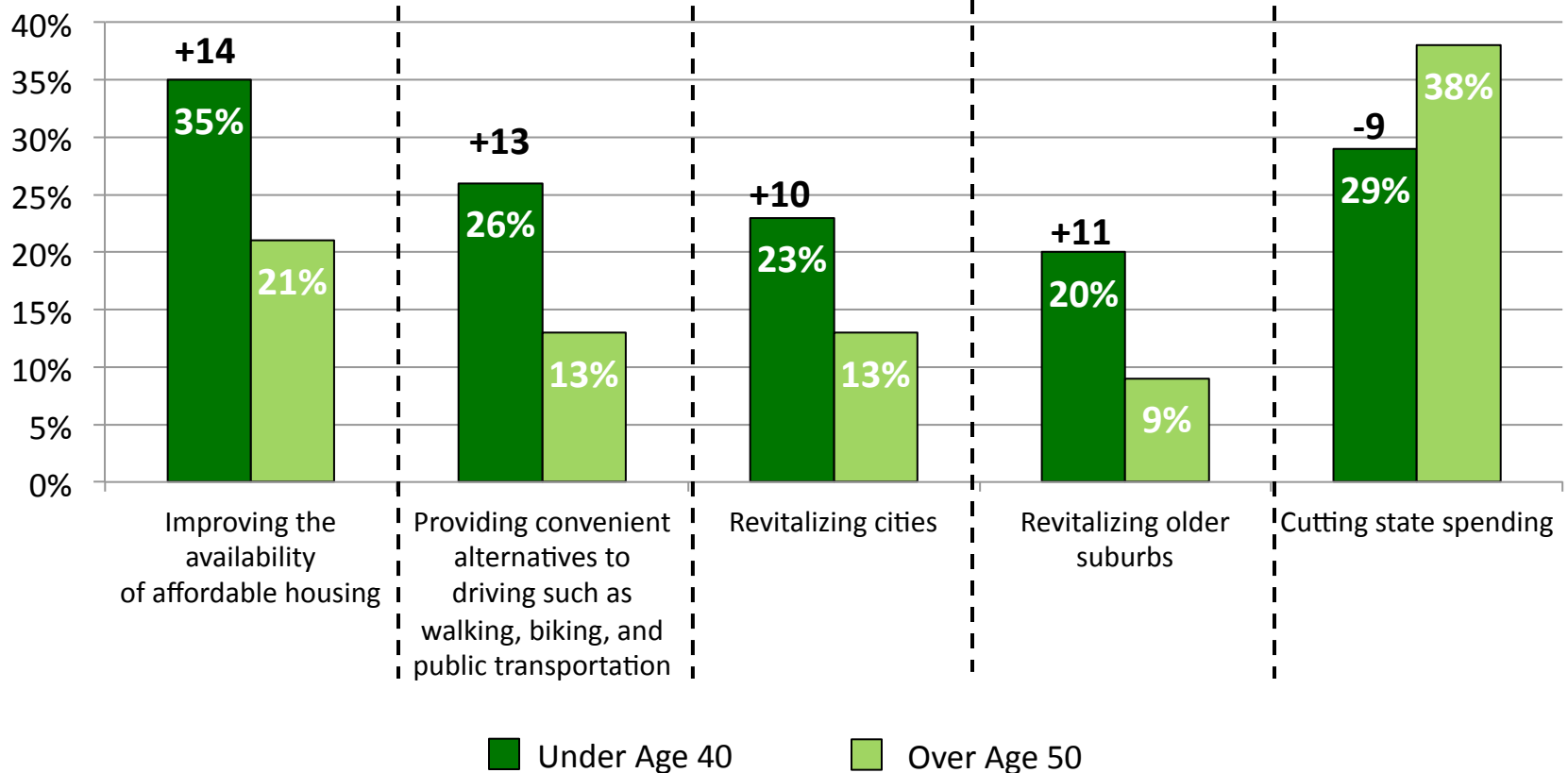


(IF YES IN TRANSIT) How strongly do you agree or disagree with each of the following statements.

*Generation Gap:
How Americans Under the Age of 40 Differ
from Those Over 50*

Younger Americans Place Higher Priority on Alternatives to Driving, Affordable Housing and Urban/Suburban Revitalization

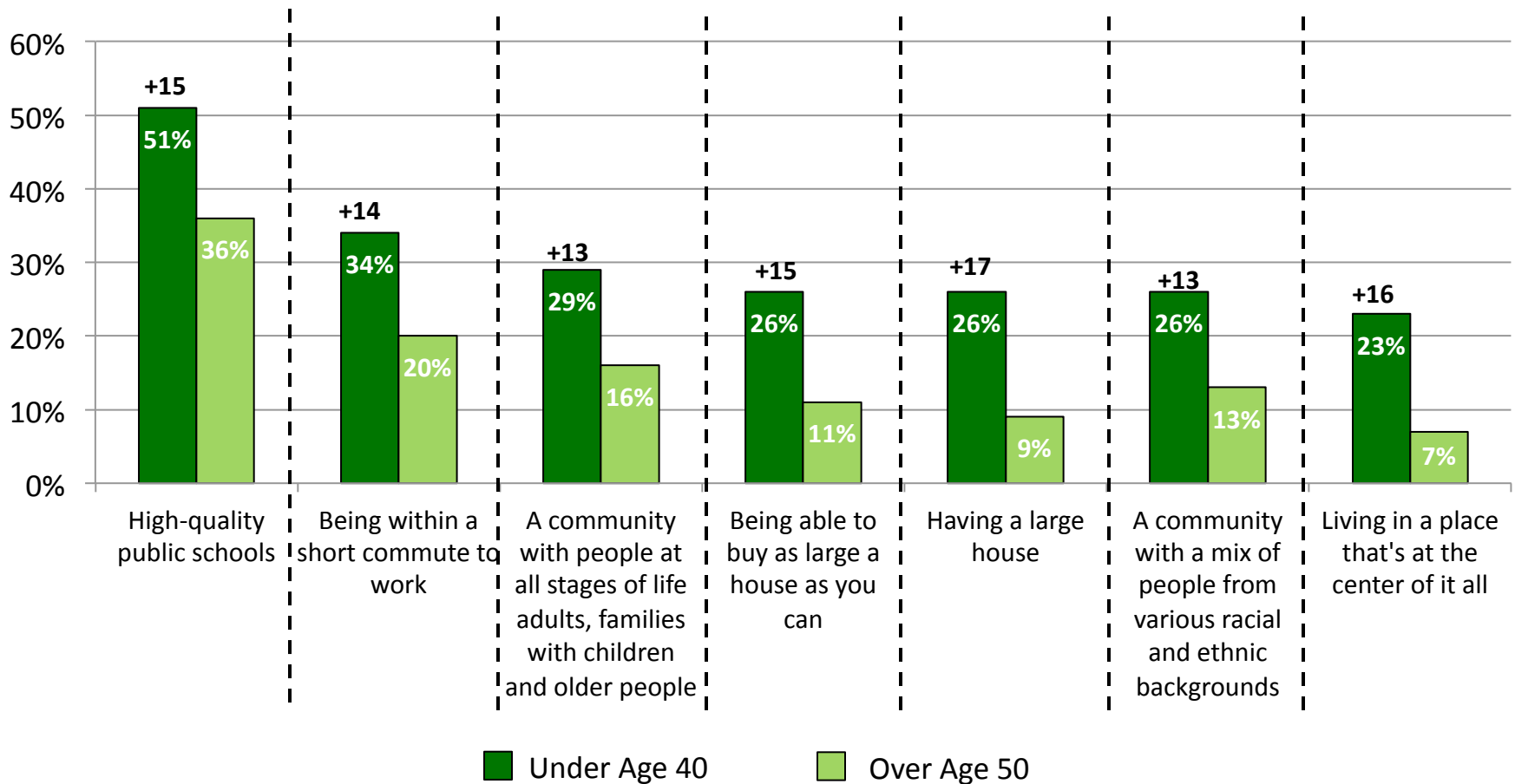
Extremely High Priorities for State Government: Differences by Age



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House Size, Activities, Schools and Diversity More Important to Younger Americans

Important Factors in Deciding Where to Live by Age

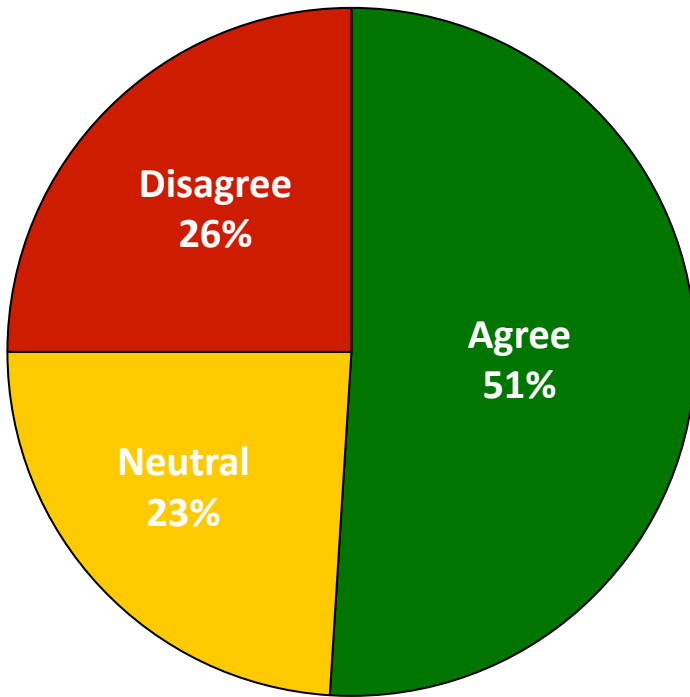


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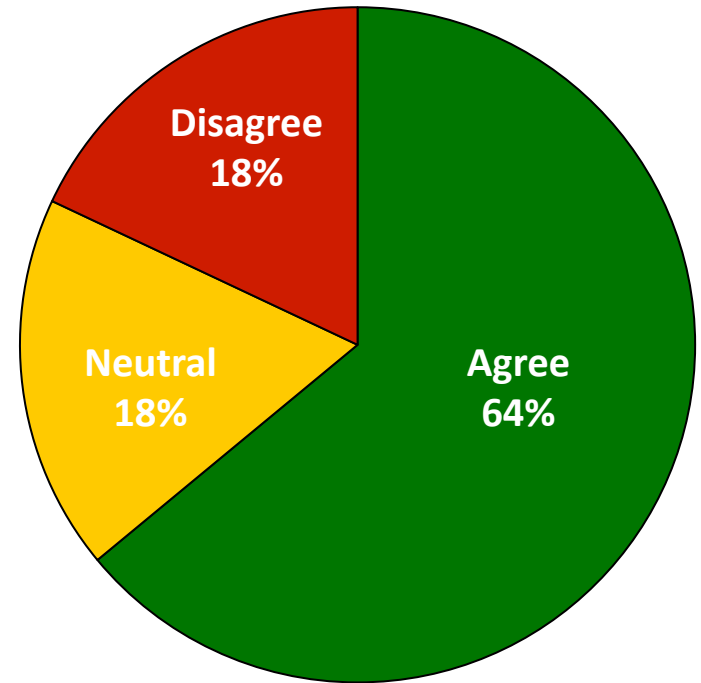
Younger Americans Less Likely to Agree That Car is King

Agree/Disagree: For Me, Car is king. nothing will replace my car as my main mode of transportation

Under Age 40



Over Age 50



TAKEAWAYS

- *Demand for walkability is very strong*
 - *People want public transportation*
- *Smart growth communities most popular with those now in the housing market*
- *People don't want to pay for transportation*
 - *There is demand for "Missing Middle Housing" - small lot houses*
- *Challenge: Can we provide single-family detached houses in a walkable mixed-use neighborhood with transit?*