

National Community Preference Survey

October 2013

Executive Summary - Overview

The 2013 Community Preference Survey echoes many of the major findings from the last Community Preference poll in 2011. There are few major changes in attitudes as they relate to neighborhoods and where people want to live. The economy continues to drive the overall issue agenda. But there are signs of change on the margins, as younger and better-educated Americans show marginally more affinity for compact, mixed use developments over more conventional suburban communities.

Americans are, however, somewhat conflicted in their priorities and value structure when it comes to choosing their ideal community. On the one hand, there is a desire for the closeness and convenience that come from communities where walking is easy, and errand and commute times are short. On the other hand, Americans overwhelmingly prefer to live in single-family, detached homes – even if that means driving more and a longer commute to work.

The need to find a proper balance between privacy and community is apparent in how Americans prioritize the things that are important to them when deciding where they want to live. Privacy from neighbors is the single most important attribute, yet privacy is closely followed by more communal characteristics - like high-quality public schools, sidewalks and being within an easy walk of other places and things in the community.

Executive Summary - Mood

As in 2011, attracting businesses and creating jobs remains the top priority. But the focus on jobs has dropped a bit, while there is a higher priority placed on some other economic concerns.

- Business and jobs remains the top priority at 78 percent, but is down from 84 percent in 2011.
- Crime, education, health care and state government spending remain top tier issues, with little meaningful change from the last survey.
- With the scars of the recession still fresh, Americans place a higher priority on the availability of affordable housing than in 2011 (+8 points, from 51 to 59 percent high priority) and housing opportunities for people with moderate and low incomes (+11 points, from 46 to 57 percent high priority).
- While a comparatively low priority, there is also more emphasis placed on revitalizing cities (+9 points to 48 percent high priority), revitalizing older suburbs (+12 points to 38 percent) and creating new development outside cities (+13 points to 37 percent).

Executive Summary – Ideal Community

Americans prefer walkable communities, but only to a point. In most comparisons tested, a majority prefers the community where it is easier to walk or the commute is shorter. But when comparing a detached single-family house to an apartment or townhouse, the detached home wins out - even with a longer commute and more driving.

- A majority prefers houses with small yards and easy walks to schools, stores and restaurants over houses with large yards but where you have to drive to get to schools, stores and restaurants (55 percent to 40 percent).
- An even larger majority prefers houses with smaller yards but a shorter commute to work over houses with larger yards but a longer commute to work (57 percent to 36 percent).
- A neighborhood with a mix of houses, stores and businesses that are easy to walk to is preferred over a neighborhood with houses only that requires driving to stores and businesses (60 percent to 35 percent).
- Nevertheless, when given a choice between a detached, single family house that requires driving to shops and a longer commute to work and an apartment or condominium with an easy walk to shops and a shorter commute to work, a strong majority prefers the single family home – even with the longer commute (57 percent to 39 percent).

Executive Summary – Where to Live

In general, 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: 75 percent of small town and rural residents would still live in a rural area if they could choose any place to live. Two-thirds of suburban residents would still choose to live in the suburbs, and 58 percent of city residents would still choose to live in the city.

- Four-in-ten city residents would choose to live somewhere else if they could: 25 percent would move to the suburbs and 17 percent to a small town or rural area.
- Close to one-third of suburban residents would choose either a rural area (18 percent) or would move to the city (12 percent) if they could.
- Only one-quarter of rural residents would choose to live elsewhere if they could: 15 percent would prefer a suburb and 10 percent the city.
- Overall, more people would prefer to live in a small town or rural area (30 percent) than live there now (22 percent). Fewer people would prefer to live in cities (28 percent) than live there now (35 percent).

Executive Summary – Community Choice

There is a split between those who prefer a walkable community with a mix of housing, close by commerce, limited parking and public transportation as opposed to a more conventional single-family houses only community, where driving is required and public transport is unavailable. Half prefer the walkable community and 45 percent prefer the conventional suburb model.

- Having places such as shopping, restaurants, a library and a school that you can either walk or drive to is the main attraction of the walkable community.
- Single-family homes only (48 percent) and short driving distance to schools and commerce (31 percent) are the top reasons for picking the conventional suburban community.
- The groups that most prefer the walkable community are post-graduates (59 percent), African Americans (56 percent), college educated men (56 percent) and college graduates under the age of 45 (55 percent). The groups that most prefer the conventional suburban community are small town and rural residents (57 percent), married women (54 percent) and those who are married with kids (54 percent).
- There is a wider divide among those who have moved in the last three years or are planning to move in the next three years. Recent movers prefer the walkable community by 20 points (58 to 38 percent), almost identical to the walkable community preference expressed by those who plan to move in the next three years (+18 points, 57 to 39 percent).

Executive Summary – What’s Important in Deciding Where to Live

There are few changes from 2011 in how Americans categorize what is important to them in deciding where to live.

- Privacy from neighbors remains at the top (86 percent important), along with sidewalks and places to take walks (80 percent important) and high quality public schools (74 percent important).
- Second tier priorities center on the shared desire for both walking and driving: being within an easy walk of other places and things in the community (69 percent important); easy access to the highway (68 percent important) and being within a short commute to work (65 percent important).
- Americans place more importance on community diversity than in 2011. All three “diverse” communities scored higher than two years ago: living in a community with a mix of people from various racial and ethnic backgrounds (+11 points from 42 percent total important in 2011 to 53 percent this year), living in a community with a mix of people from various income levels (+6 points, 42 percent to 48 percent), and living in a community with people at all stages of life (+6 points, 60 percent to 66 percent).
- People place more importance on living in a community that is “at the center of it all” than in 2011 (+10 points, from 34 percent important to 44 percent). However, living in a place that is “away from it all” is still more popular overall (55 percent important).

Executive Summary – What’s Missing

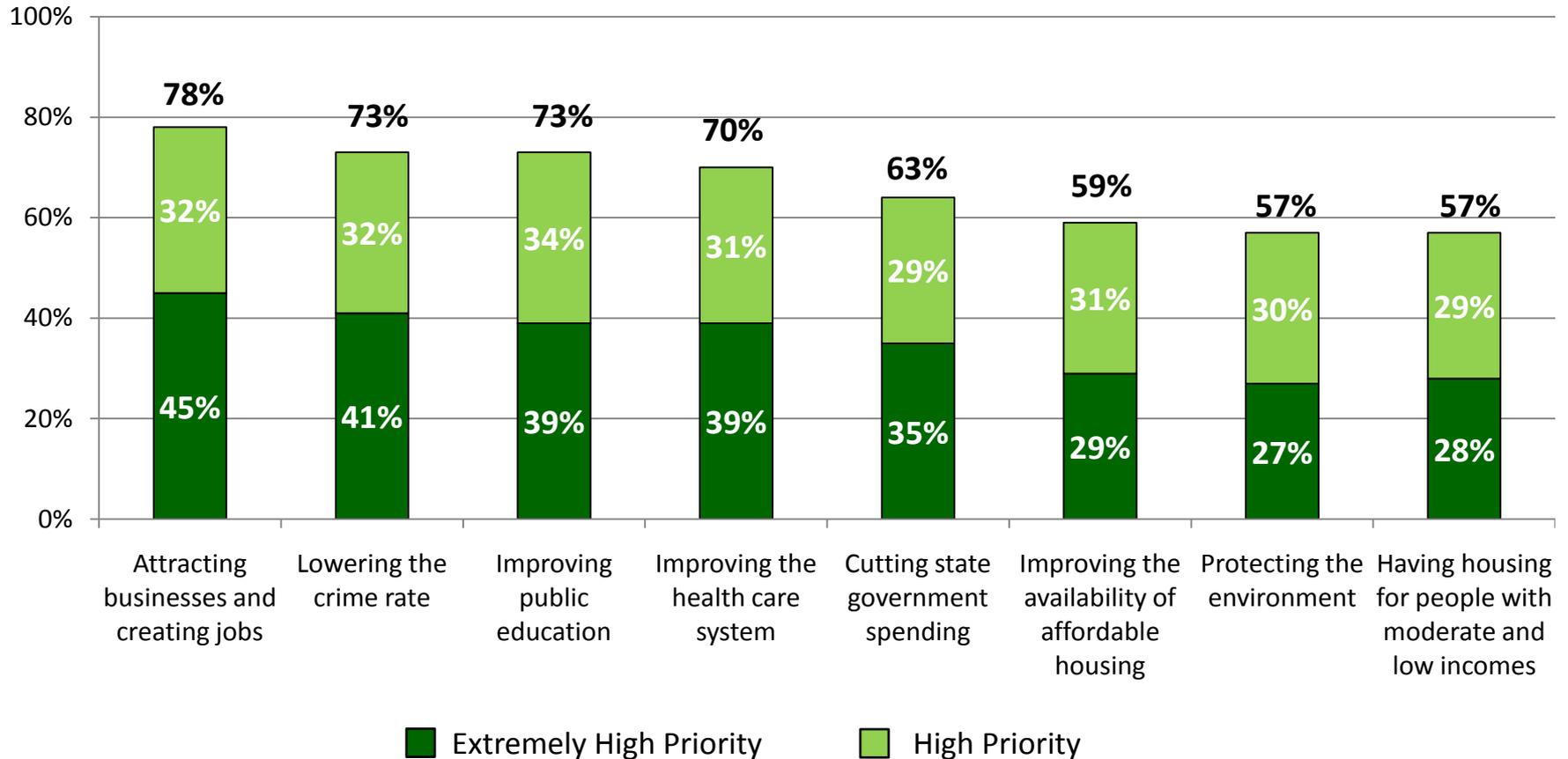
Americans are generally satisfied with the amenities available to them close to where they live. Majorities say there is the right amount of parks and playgrounds, sidewalks, large discount stores and places to walk or exercise for fun. For some other amenities, there is a split or too little available:

- Just 48 percent say there is the right amount of shops or restaurants within an easy walk of their house. Almost as many say there is too little (42 percent).
- There is an even split between those who say there is the right amount of public transportation within an easy walk and those who say there is too little (45 percent each).
- Only 36 percent agree that there is the right amount of housing for people with low incomes, while 46 percent say there is too little.
- There is also a need for more safe routes for riding bikes to work and shopping. Almost half (48 percent) say there is too little safe bike routes, compared to 41 percent who say there is the right amount.

Mood

Jobs, Crime, Education and Health Care Top Priorities

Top Priorities for State Government

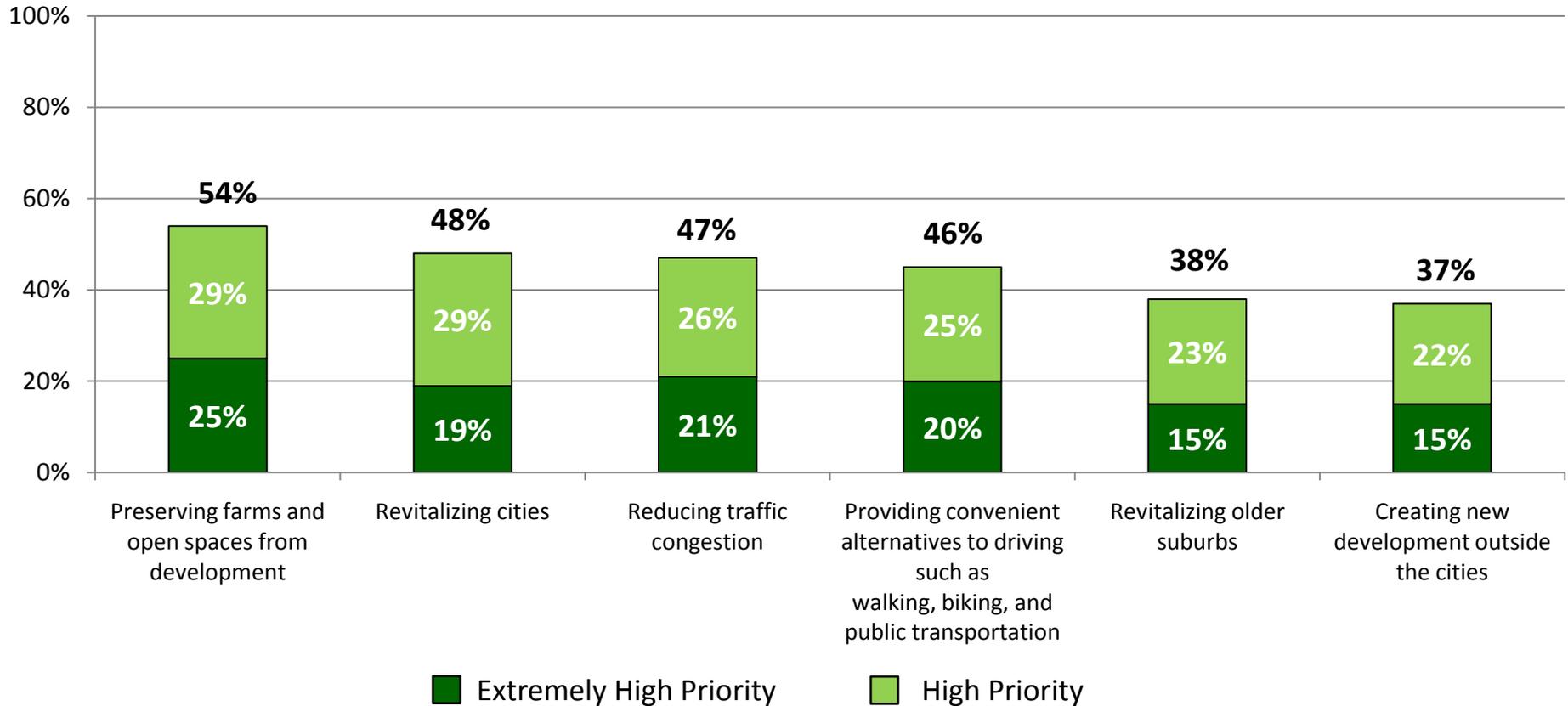


Here are some issues INSERT STATE will be facing over the next few years. For each one please indicate how much of a priority it should be for your state to address: Should it be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for your state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

Development Issues Rate Lower On Priority List

No single issue dominates agenda

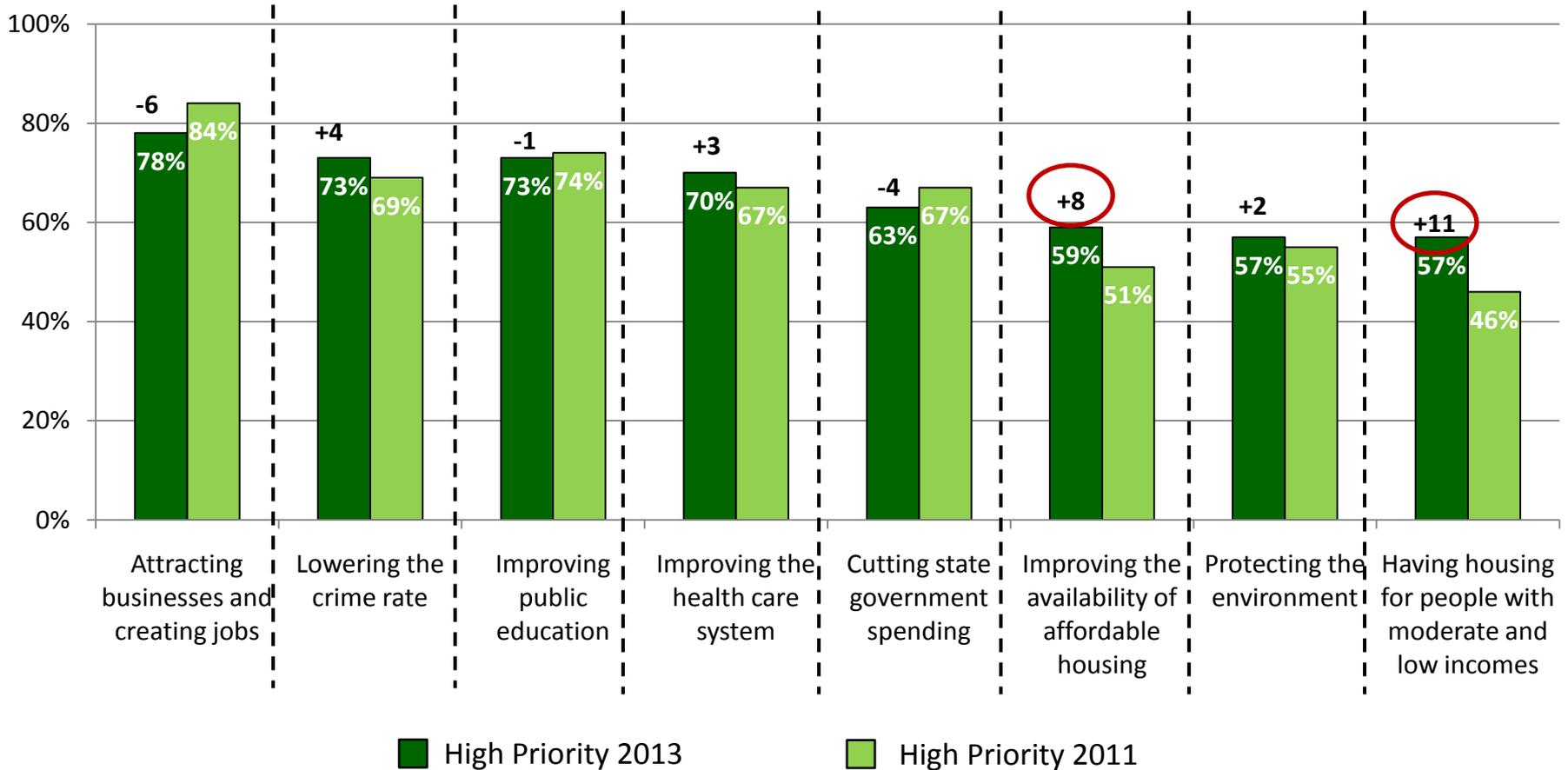
Second Tier Priorities for State Government



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

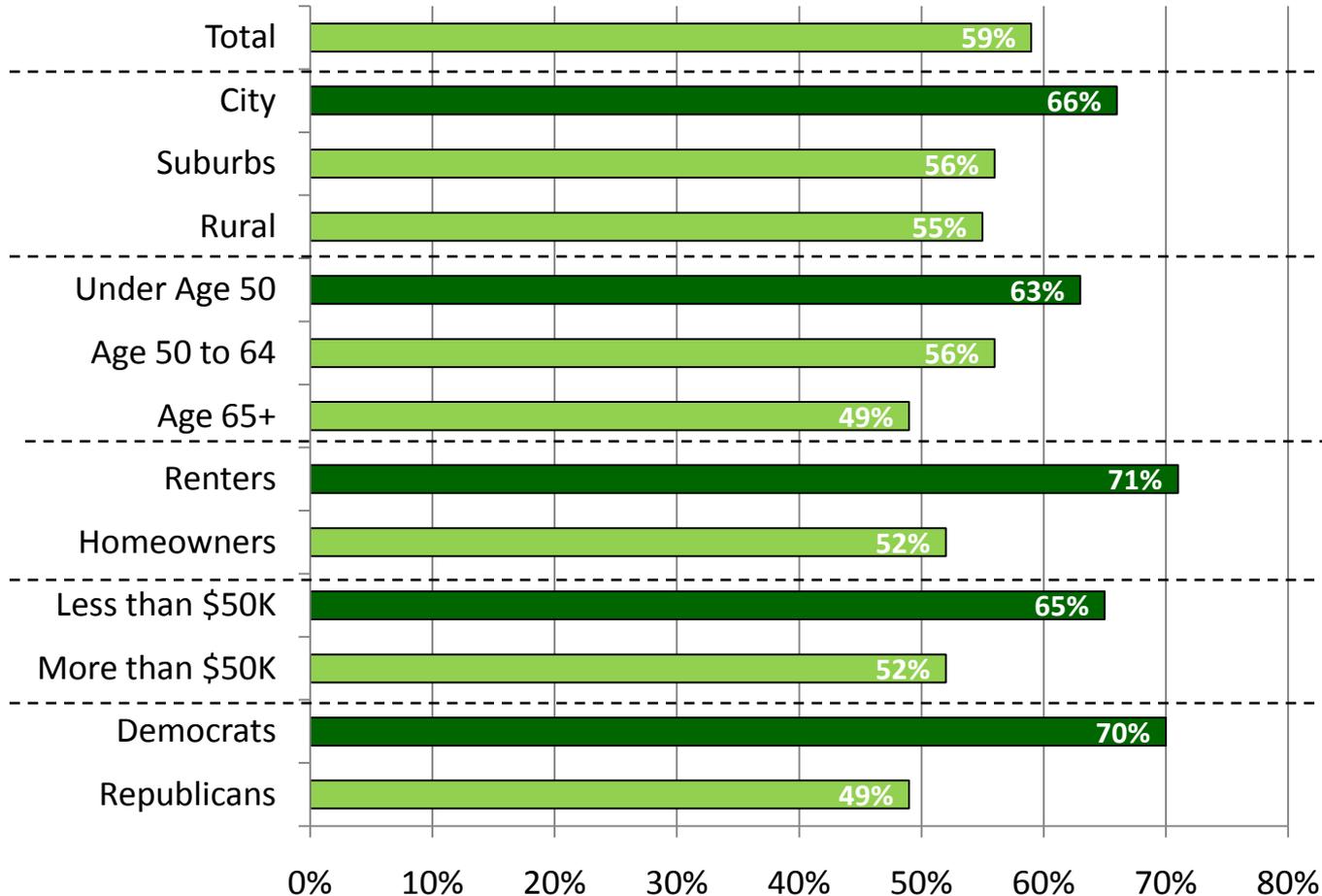
Changes in Top Priorities for State Government



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

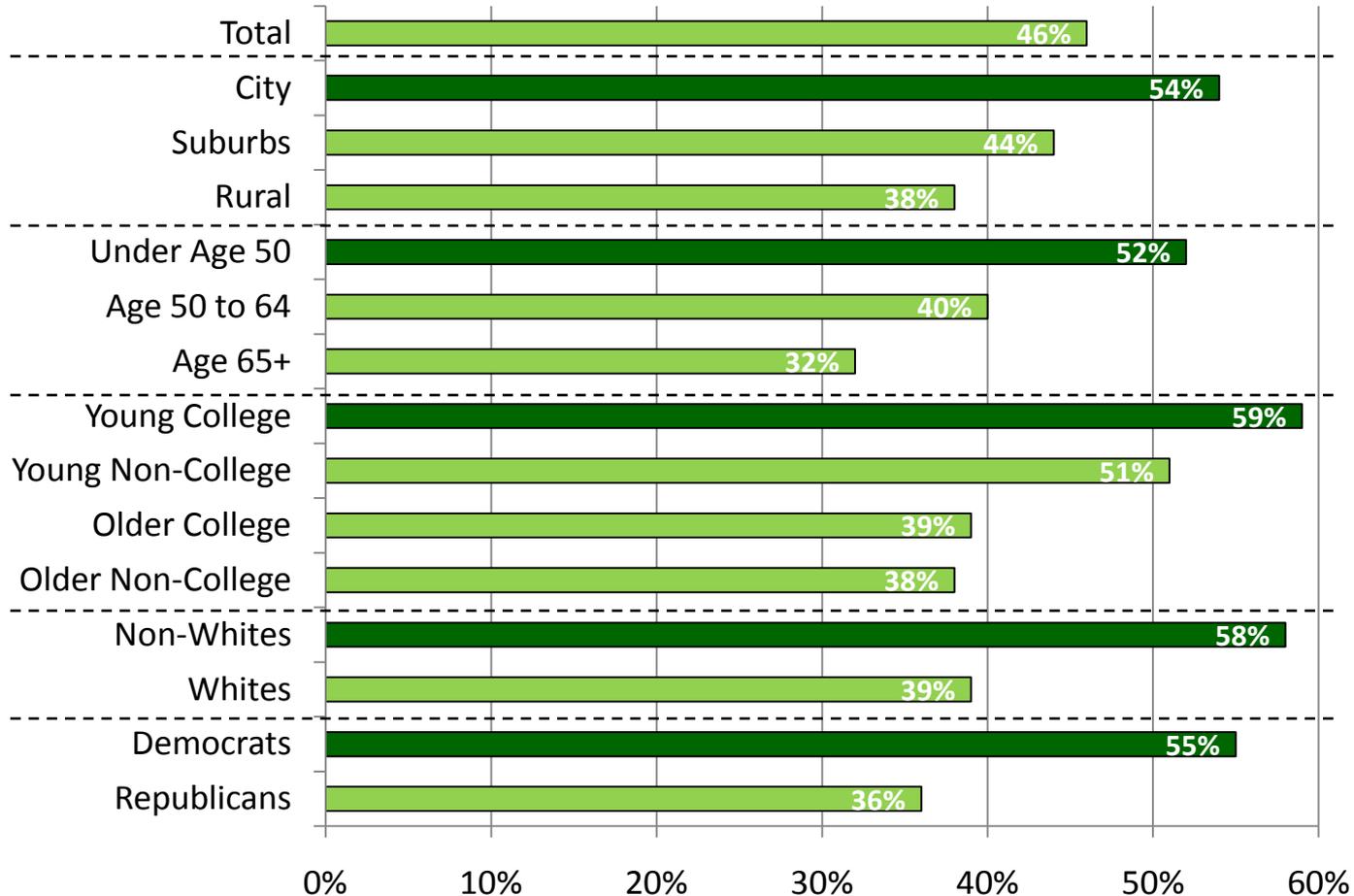
Improving the Availability of Affordable Housing: Percent High Priority by Demographics



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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

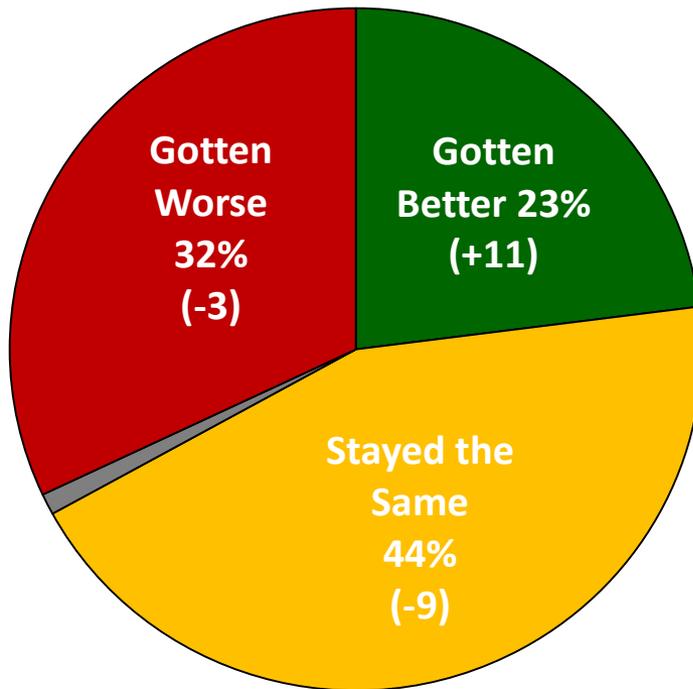


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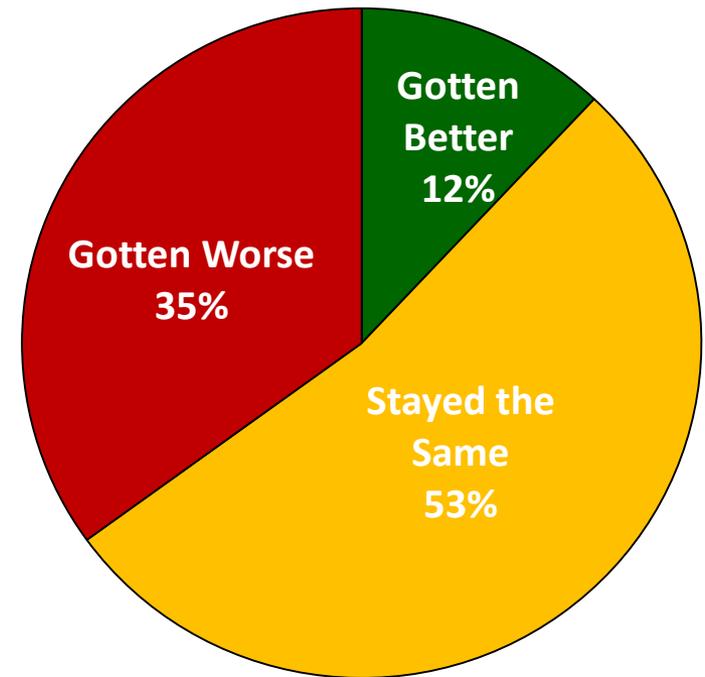
Current Living Environment

Uptick In Positive Assessments of Quality of Life

Quality of Life Where You Live (2013):



Quality of Life Where You Live (2011):

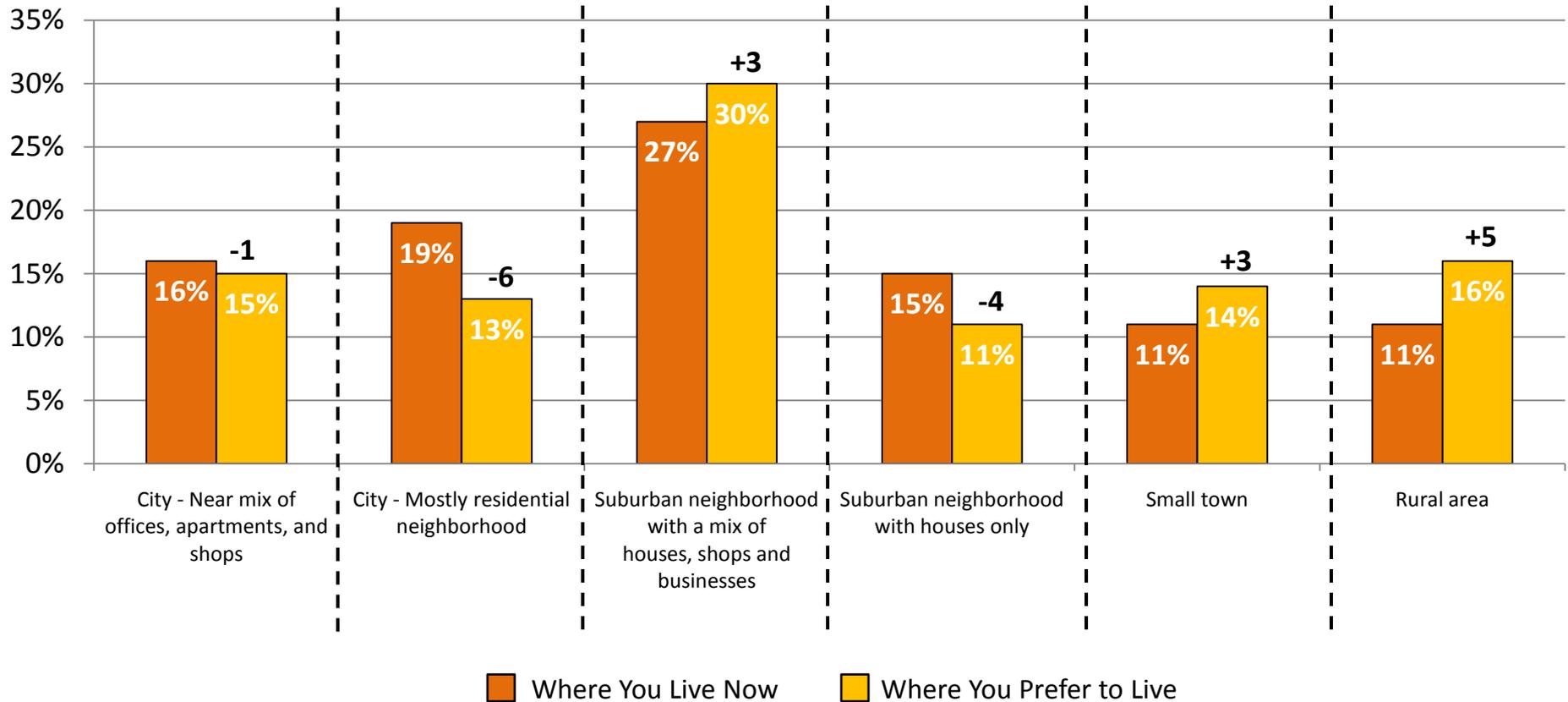


Thinking about the community in which you live, do you think the quality of life has gotten better, gotten worse, or stayed the same in the past three years?

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

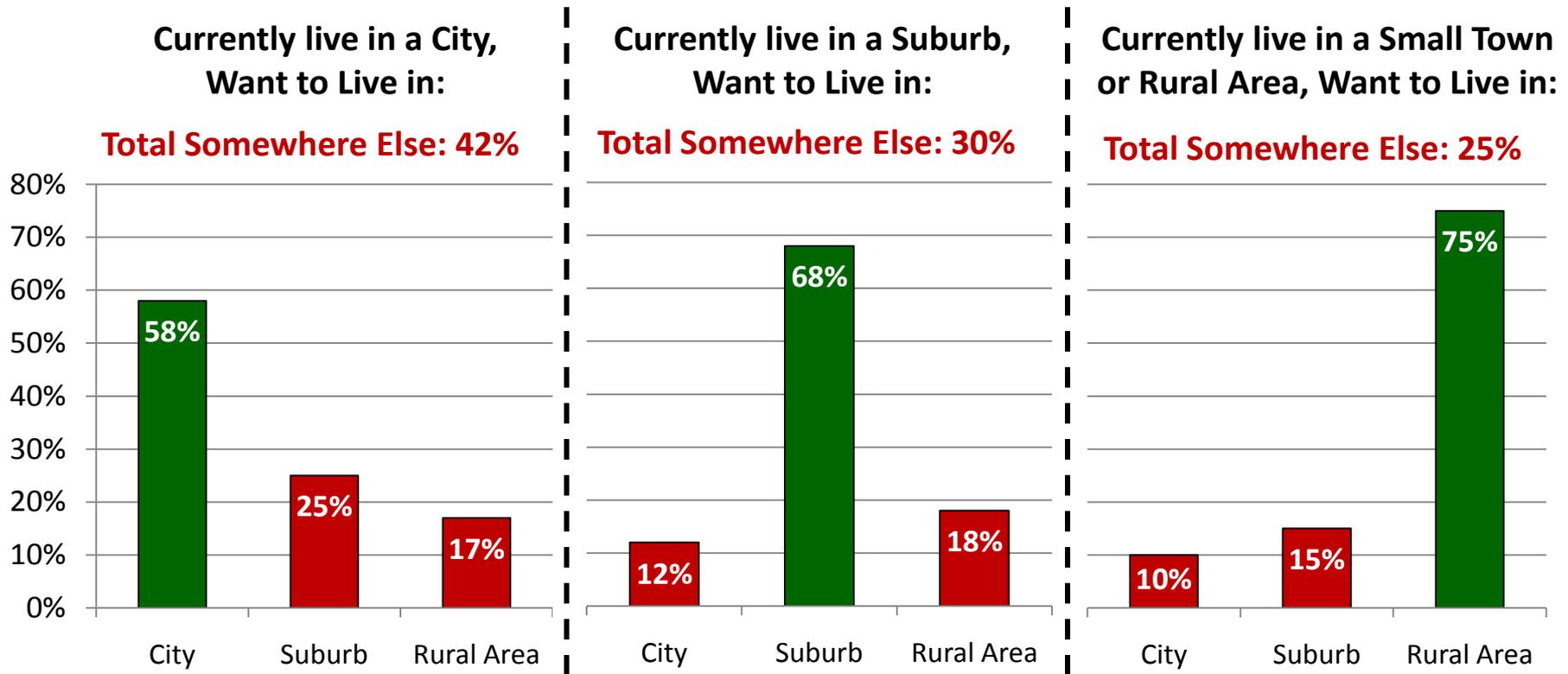


On a different topic, which of the following best describes the place where you live:
 If you could choose where to live, in which type of the following locations would you most like to live?

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.

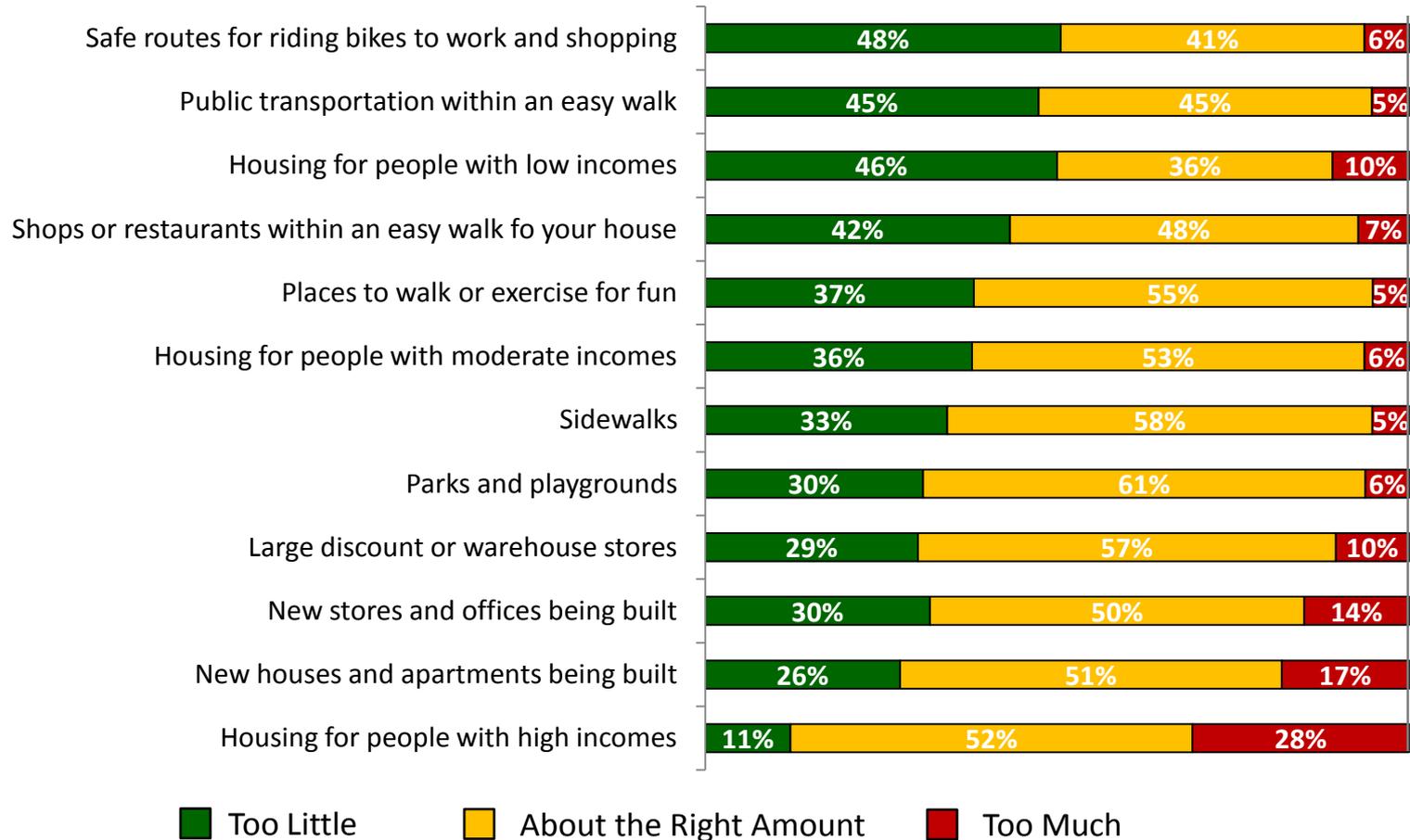
Area Where You Currently Live v. Area Where You Prefer to Live



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?

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

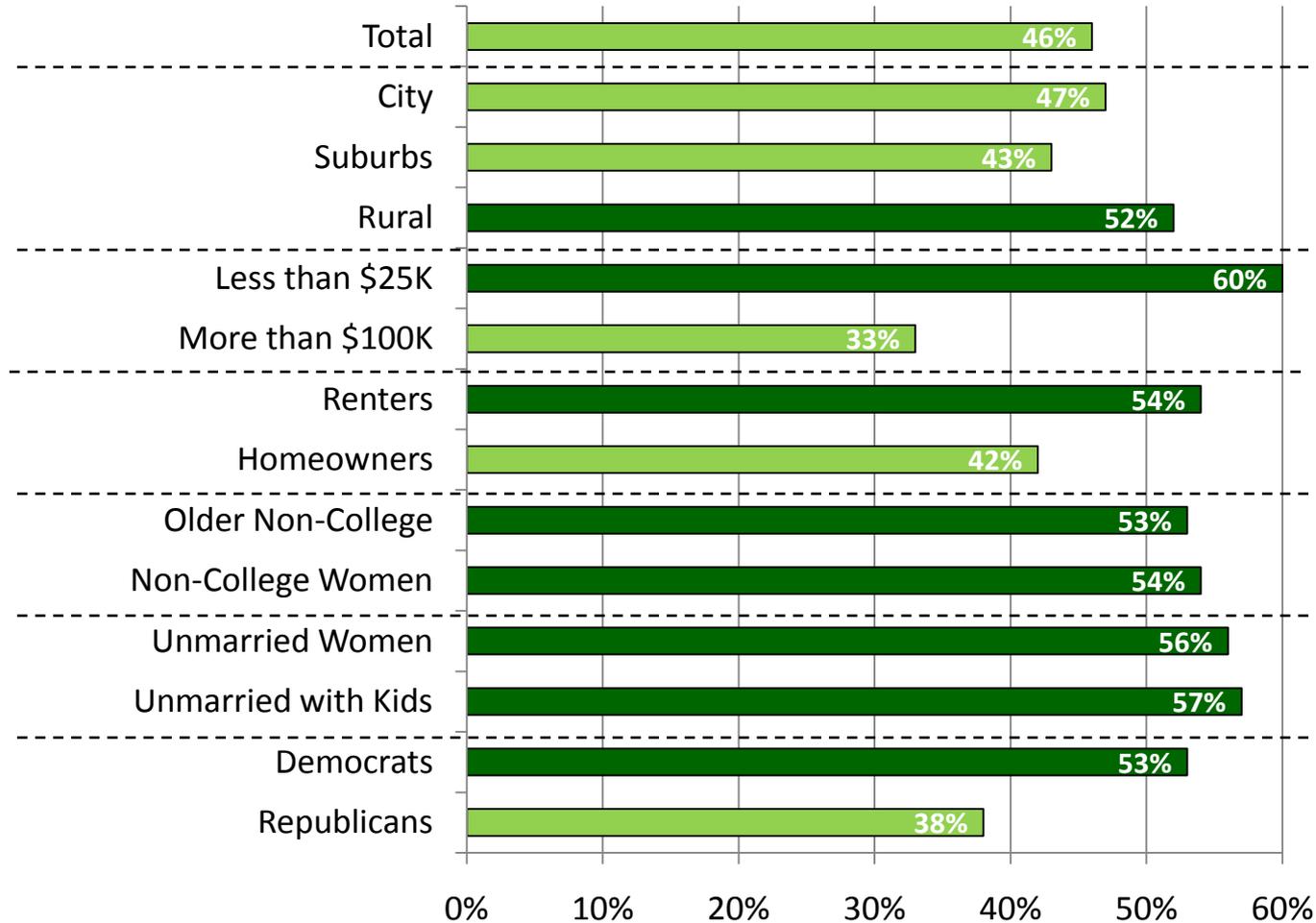
Too Little, Right Amount, or Too Much in the Area Where You Live



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

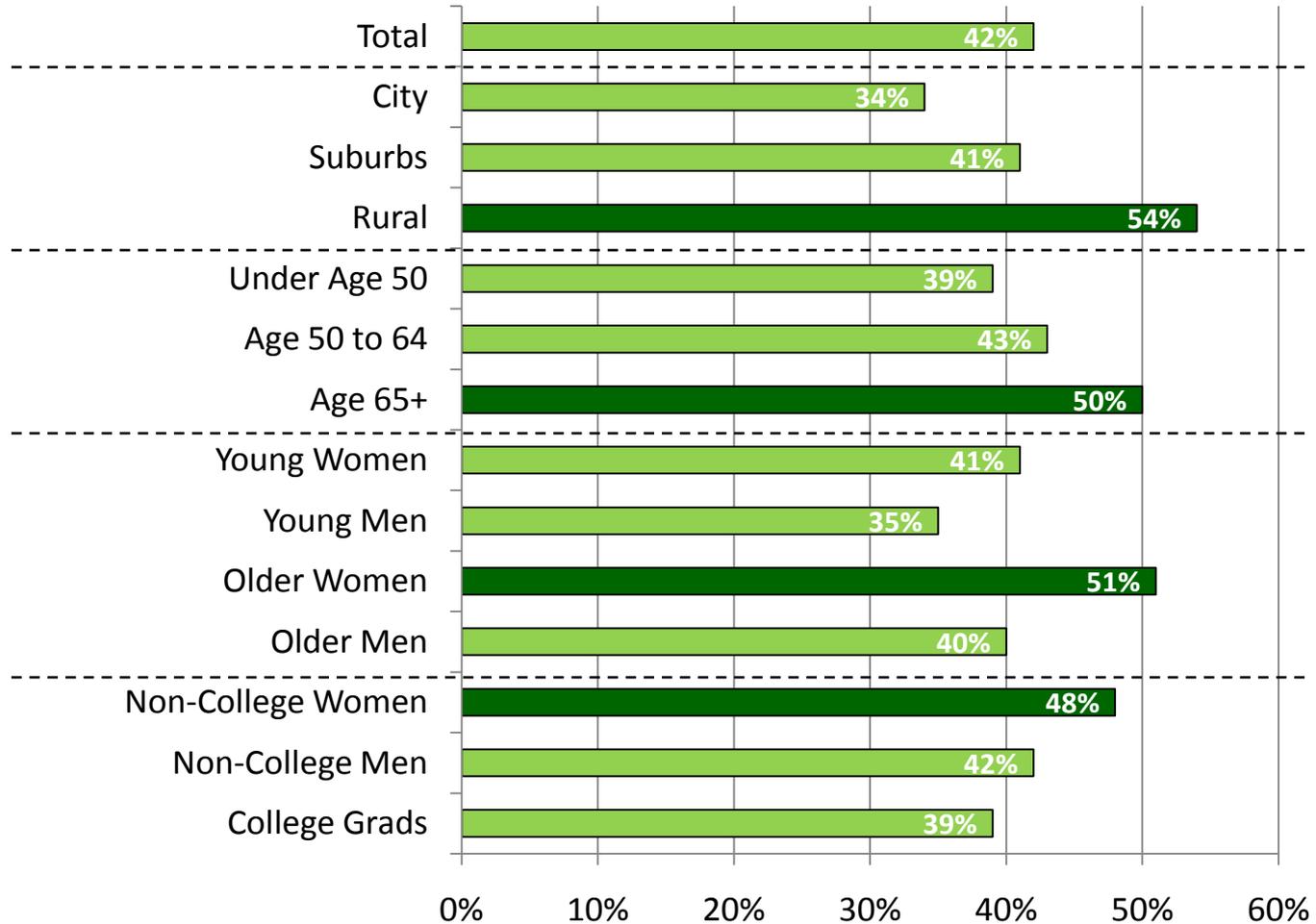
Too Little Housing for People with Low Incomes



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

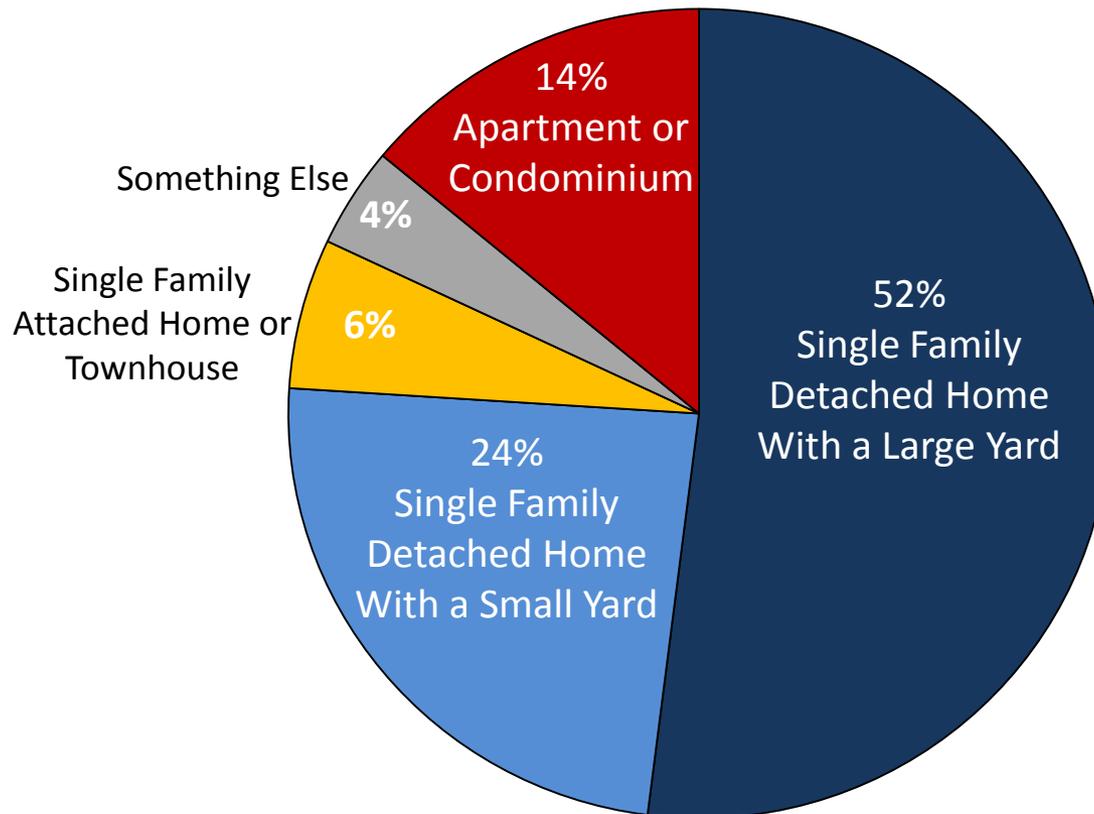


Do you think there is too much, too little, or the right amount of each of the following in the area close to where you live?

Ideal Community

American's Overwhelmingly Prefer To Live In A Detached Home

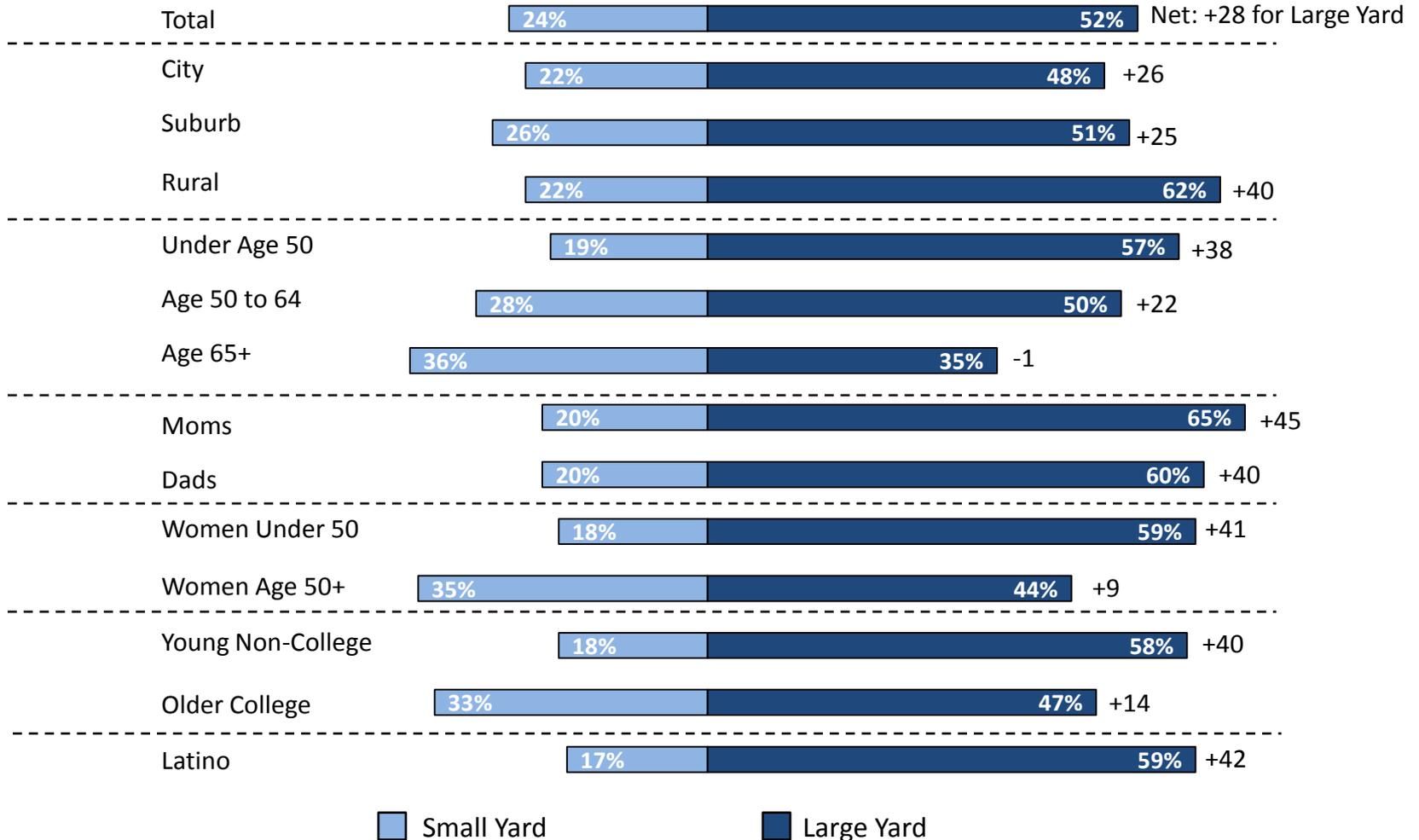
Housing Type Preference:



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

Younger Parents, Especially Women, Want a Large Yard

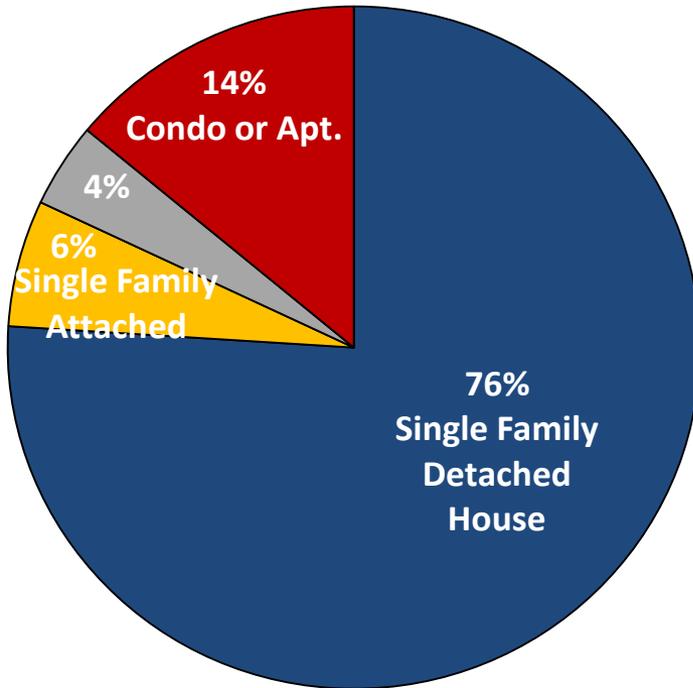
Housing Type Preference: Small Yard v. Large Yard



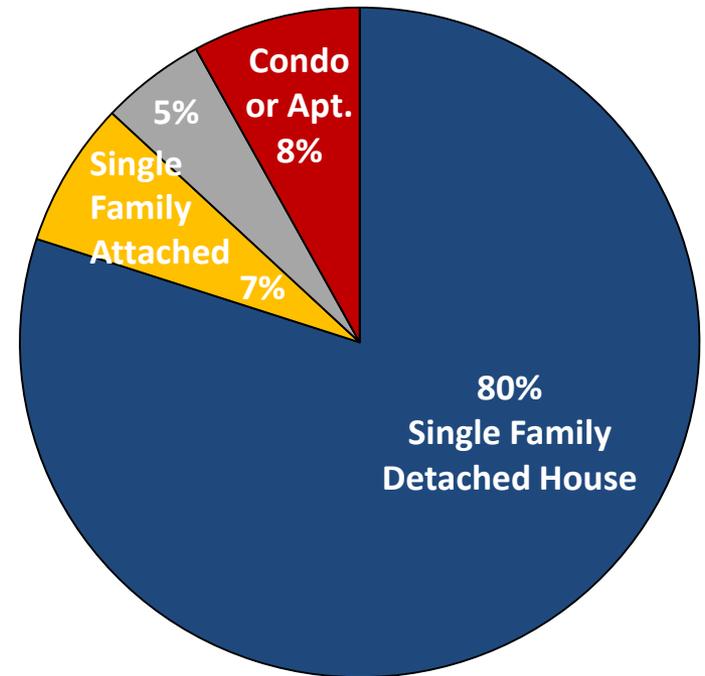
Right now, if you could choose, which of the following would you prefer to live in:

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:

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.

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.

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



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

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.

Please select the community where you would prefer to live:

*Mixed Use Community v.
Conventional Suburban Community*

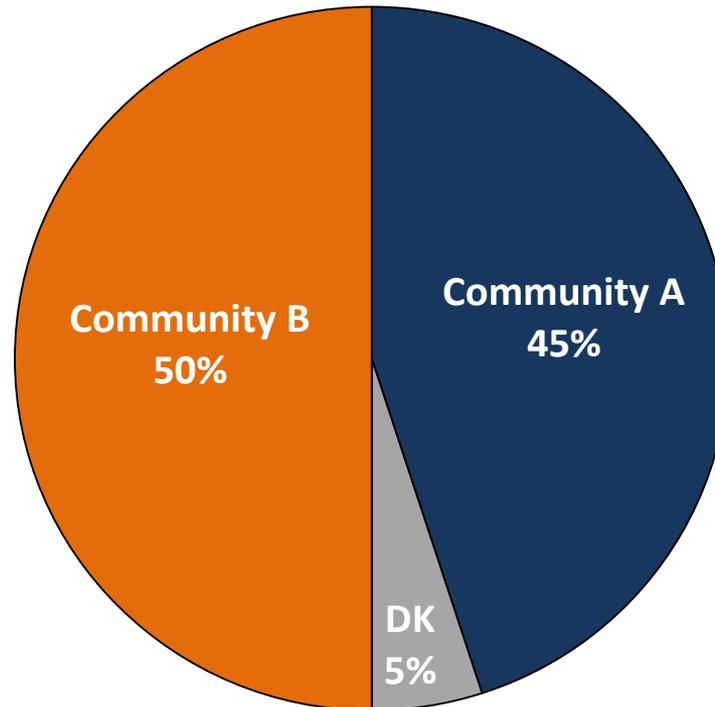
Americans Split on Preference Between Walkable, Mixed-Use Community and Conventional Suburban Community

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:

Education, Marital Status and Race Drive Community Preference

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)
- Married men (+2)
- Post high school education (+1)
- Whites (-1)

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:

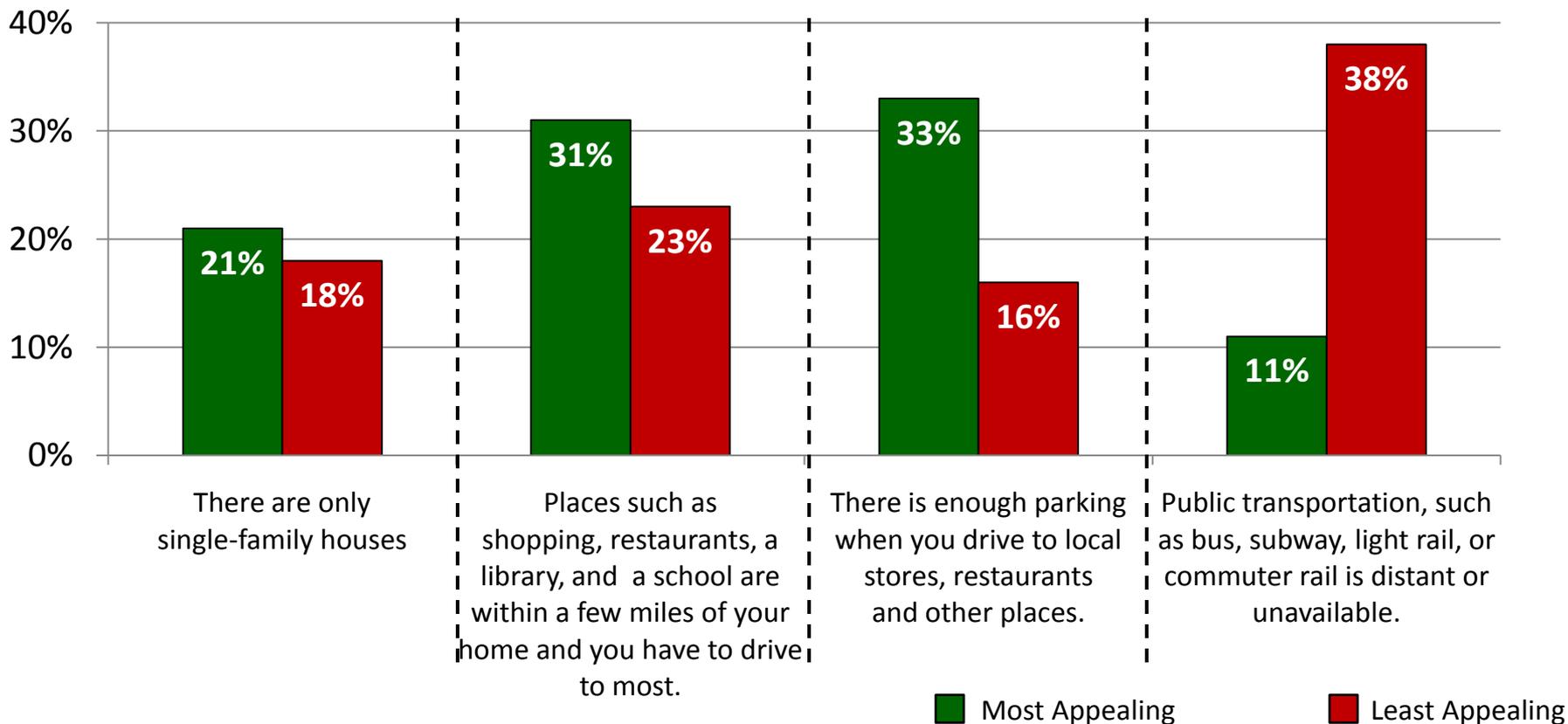


(IF COMMUNITY A) Look at the community you selected and choose the ONE most appealing characteristic of that community for you.

Parking and Ease of Driving Has Some Appeal to Those Who Prefer Walkable Community

Lack of public transportation least appealing

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

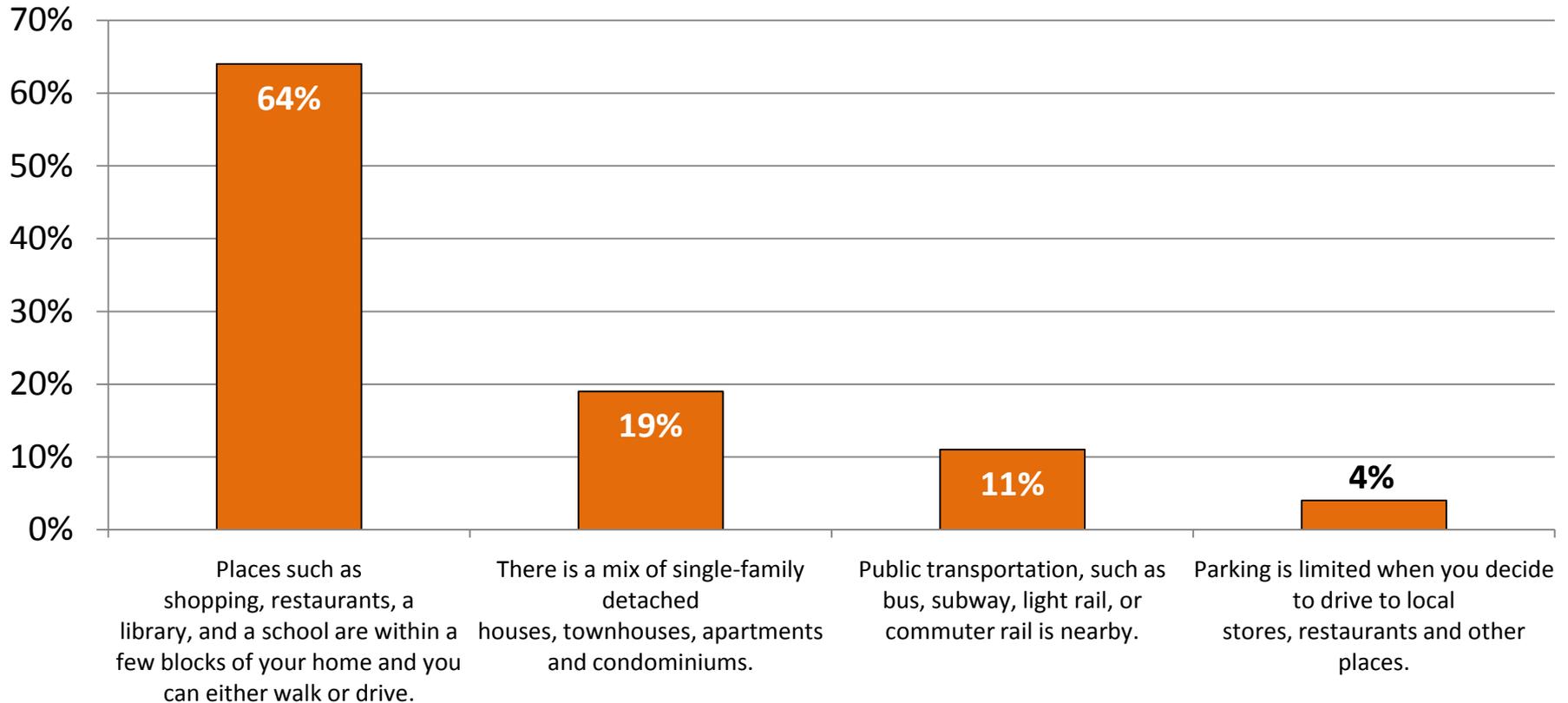


(IF COMMUNITY B) Looking at the community you did NOT select, choose the ONE most appealing characteristic of that community you would like to have from that list.

(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:

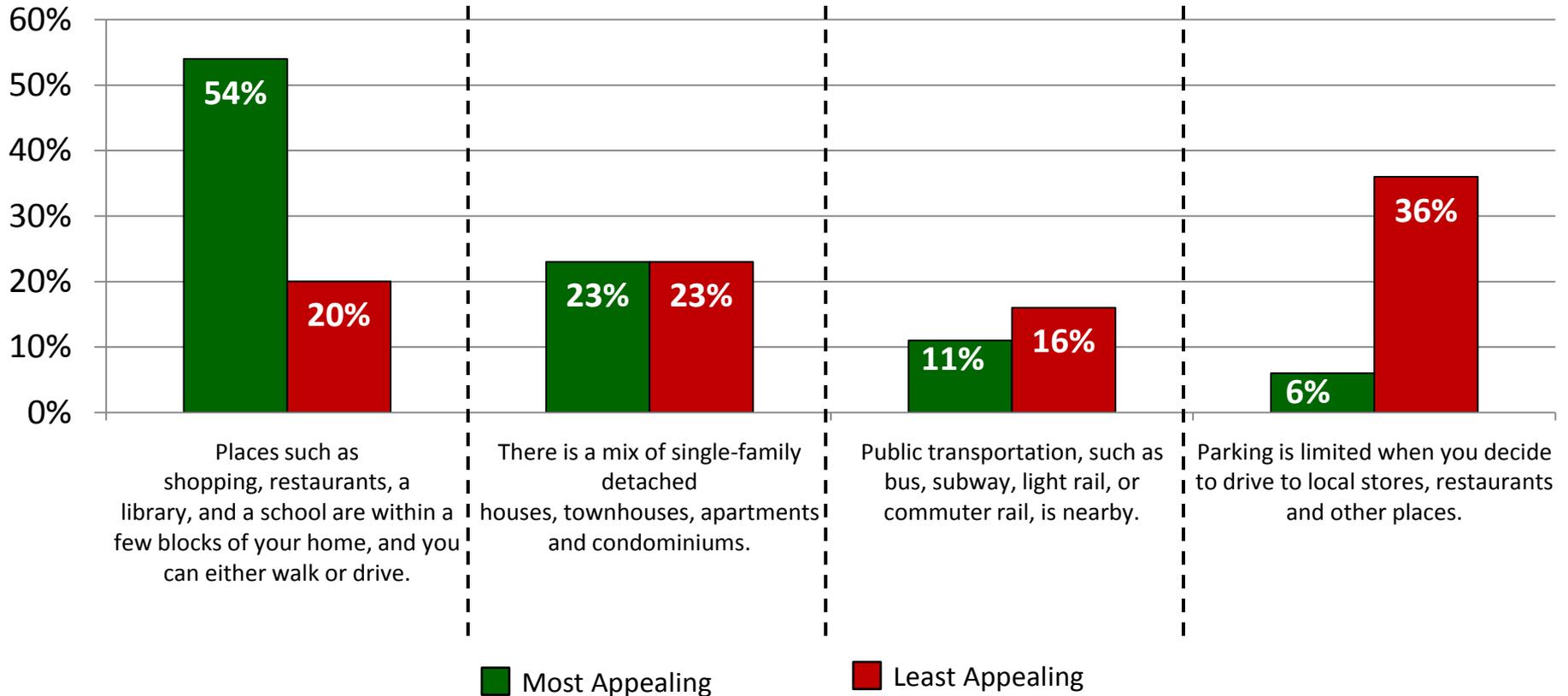


(IF COMMUNITY B) Look at the community you selected and choose the ONE most appealing characteristic of that community for you.

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.

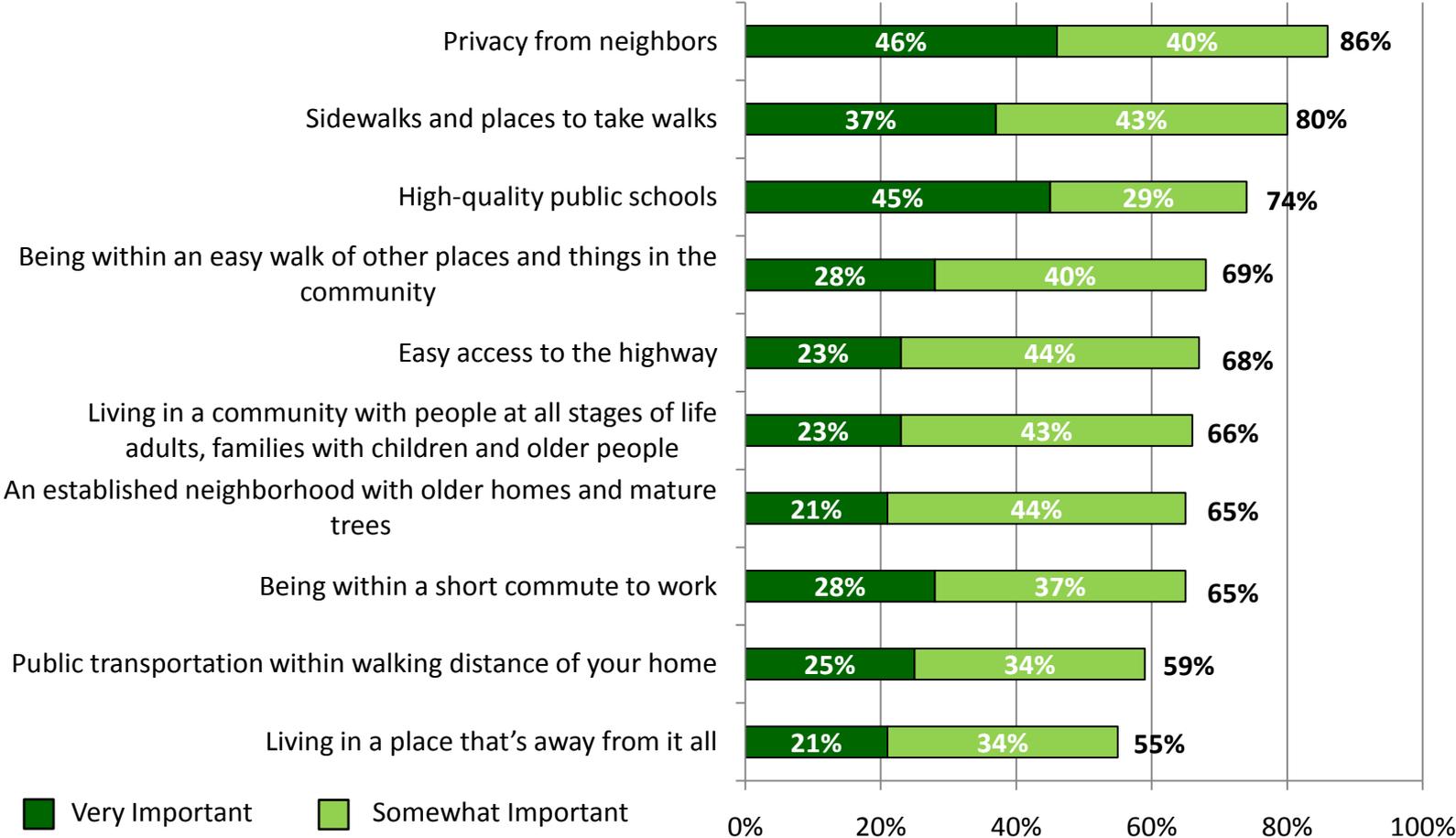
(IF SOMMUNITY A) Looking at the community you did NOT select, choose the ONE LEAST appealing characteristic of that community.

What's Important in Deciding Where to Live

Privacy, Walkability, Schools

Most Important in Deciding Where to Live

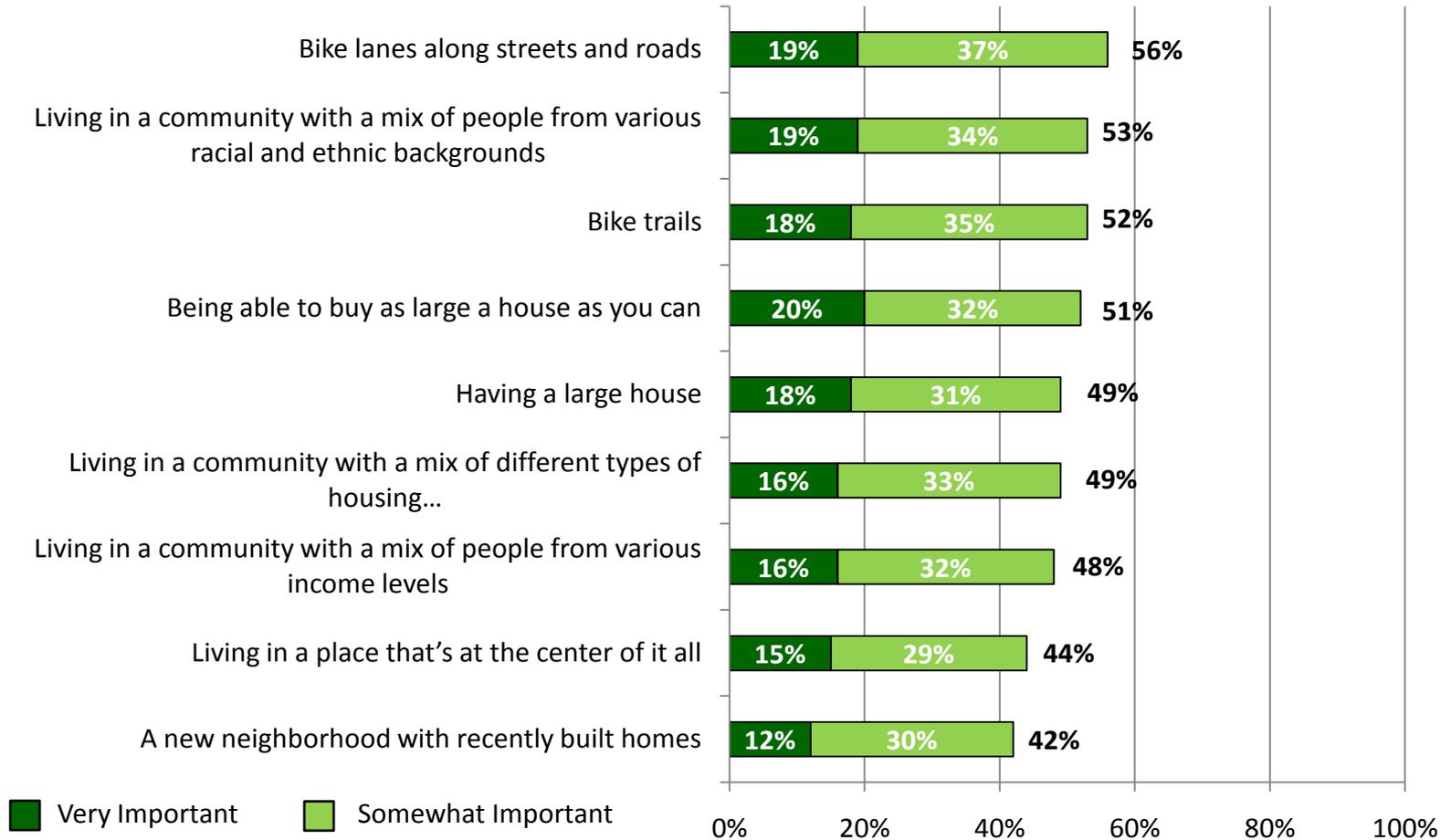
Most Important Factors in Deciding Where to Live:



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

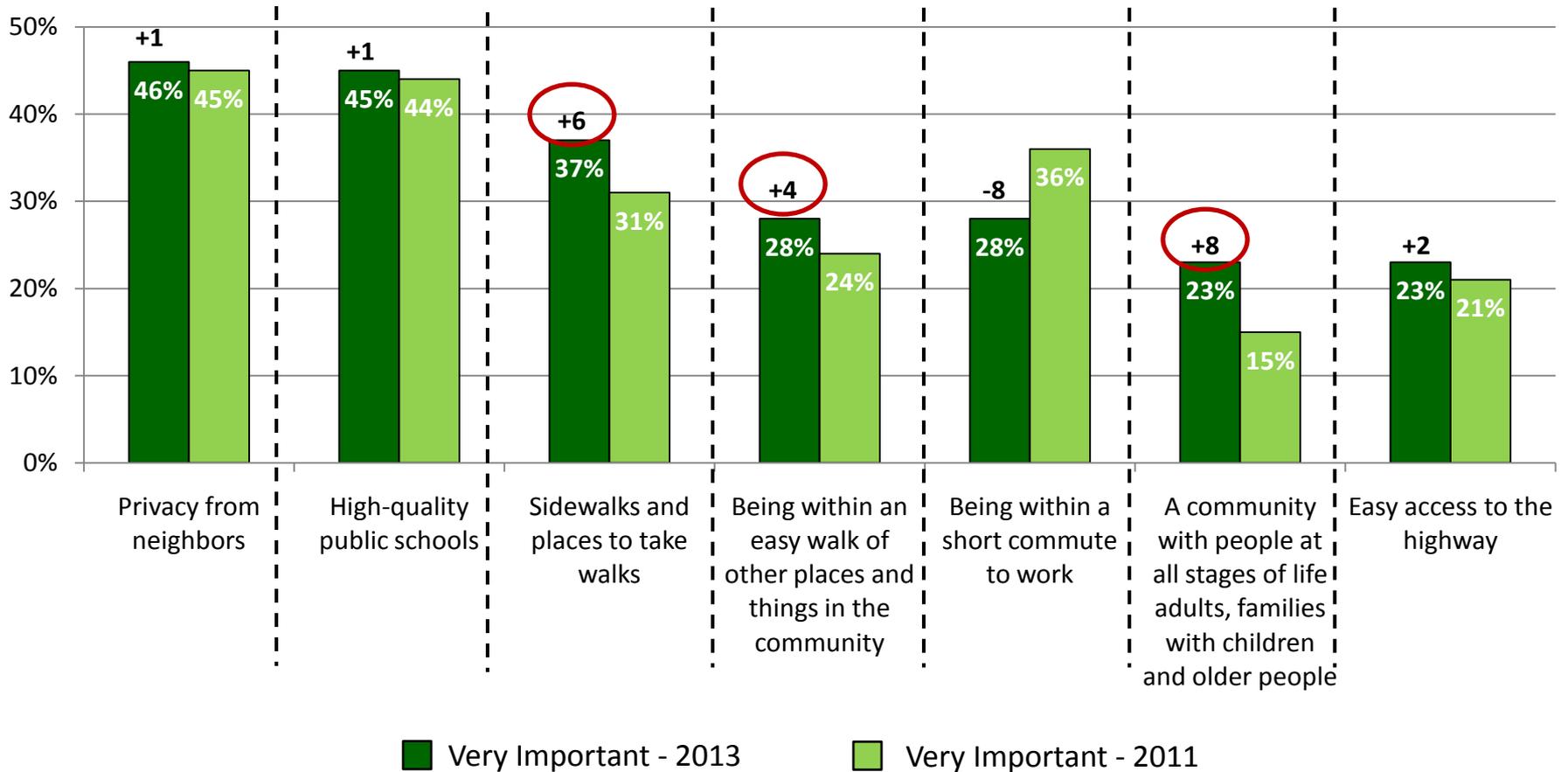
Less Important Factors in Deciding Where to Live:



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

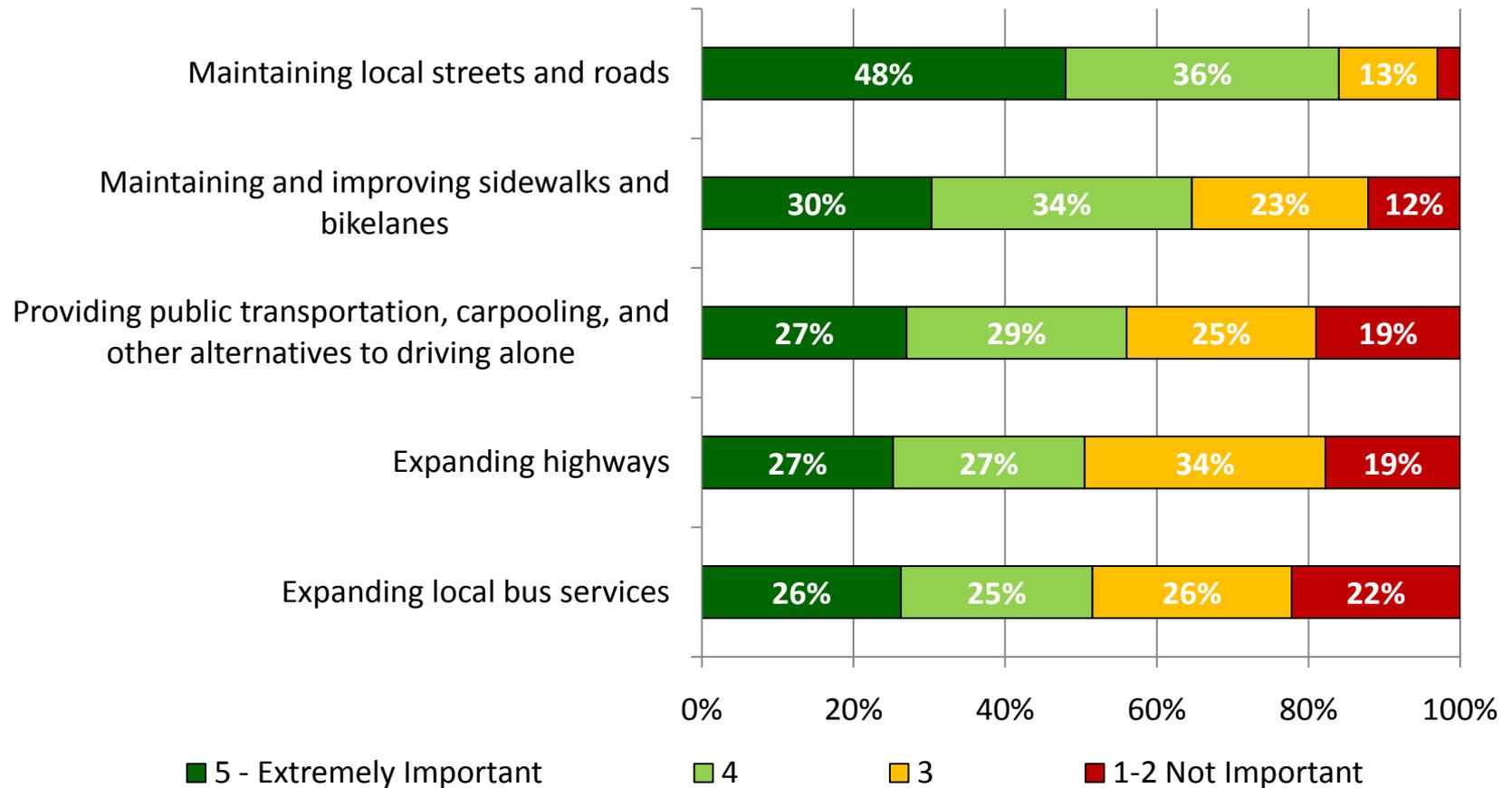


Q.47 In deciding where to live, indicate how important having each of the following would be to you: very important, somewhat important, not very important, or not at all important.

Transit and Transportation

Road Maintenance Key To Improving Quality of Life

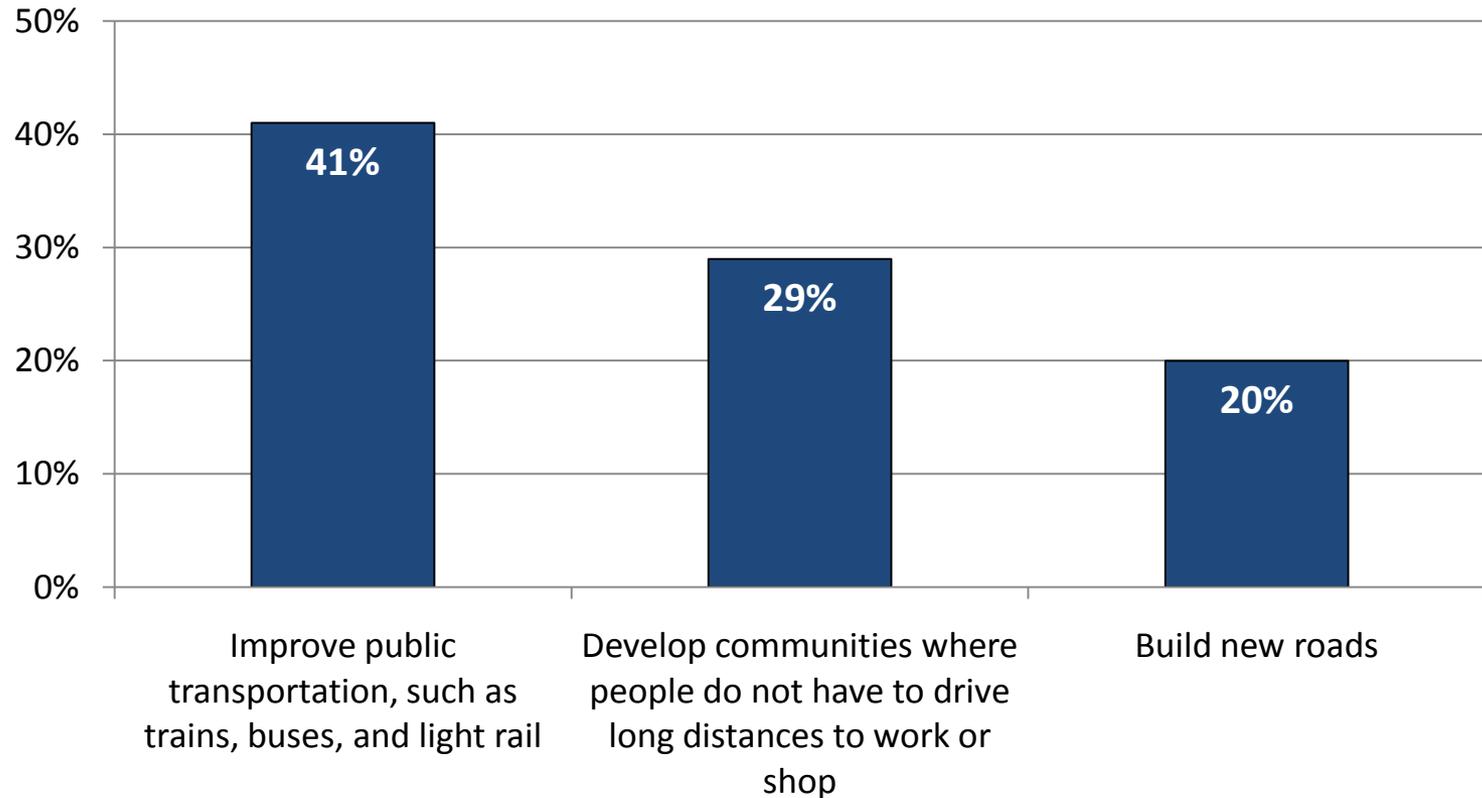
Importance for Improving the Quality of Life in the Area Where You Live (1 to 5 Scale)



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

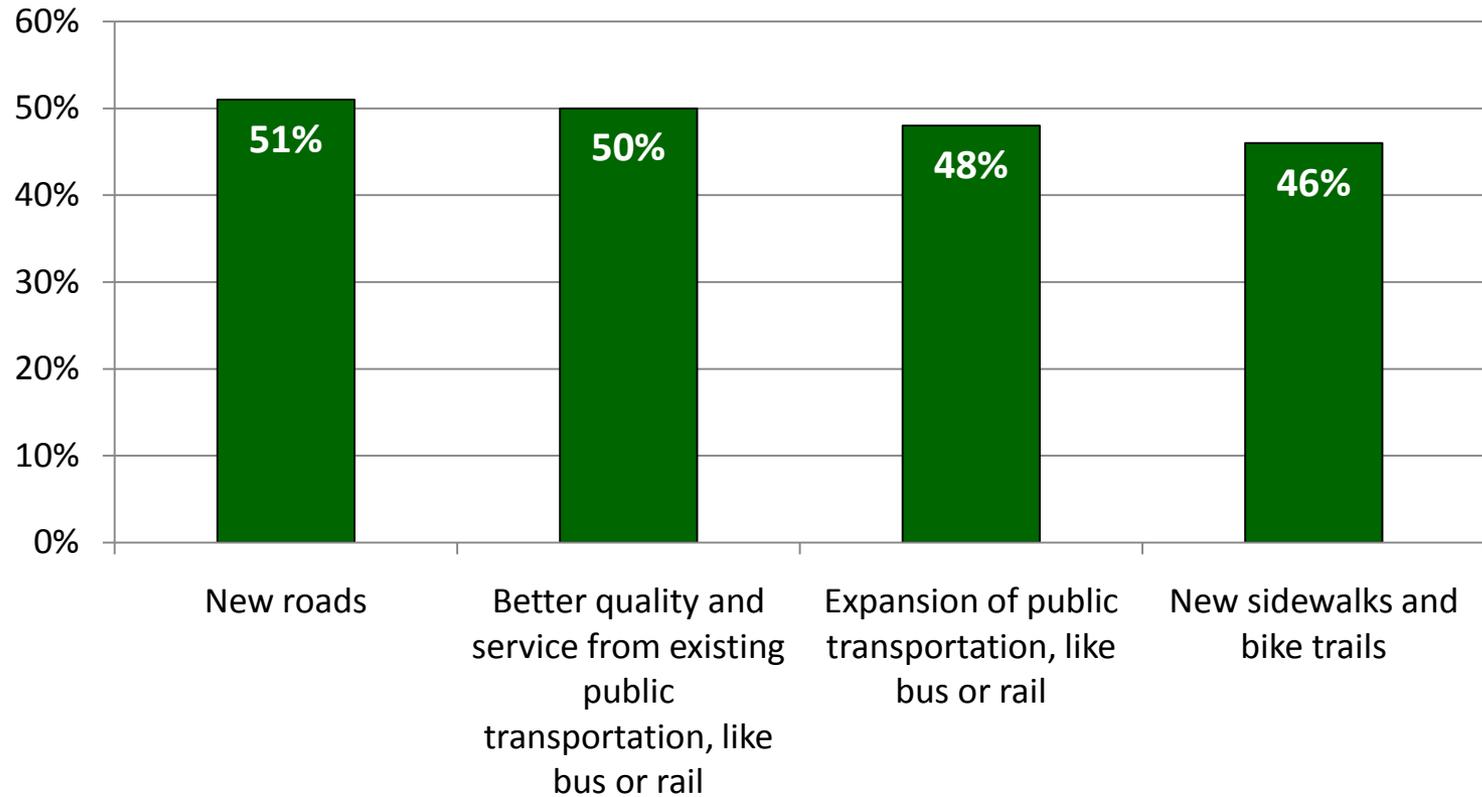
Proposals for Long Term Solution to Reducing Traffic and Improving Transportation in Your State:



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

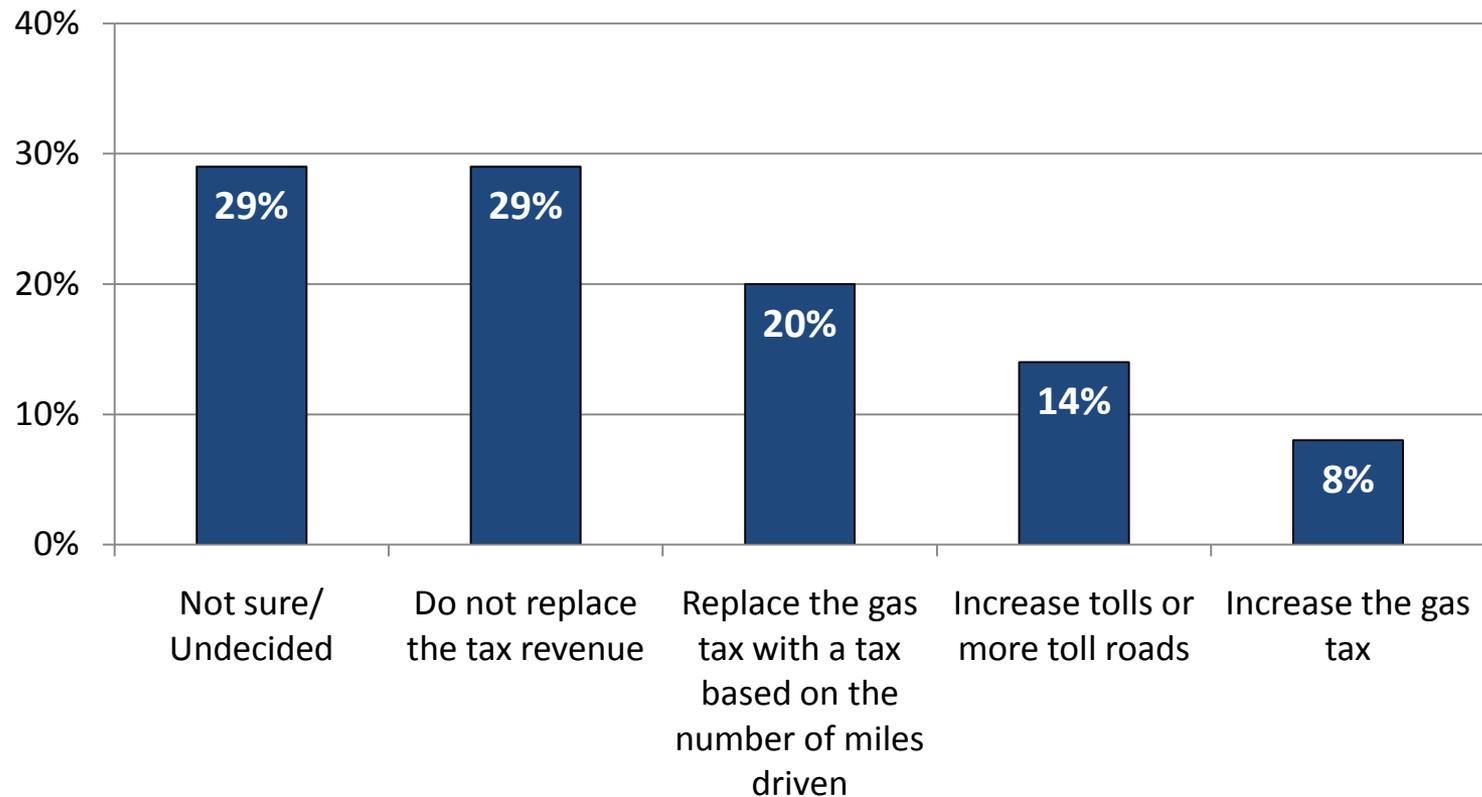
Willing to Pay a Little More in Taxes to Fund:



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

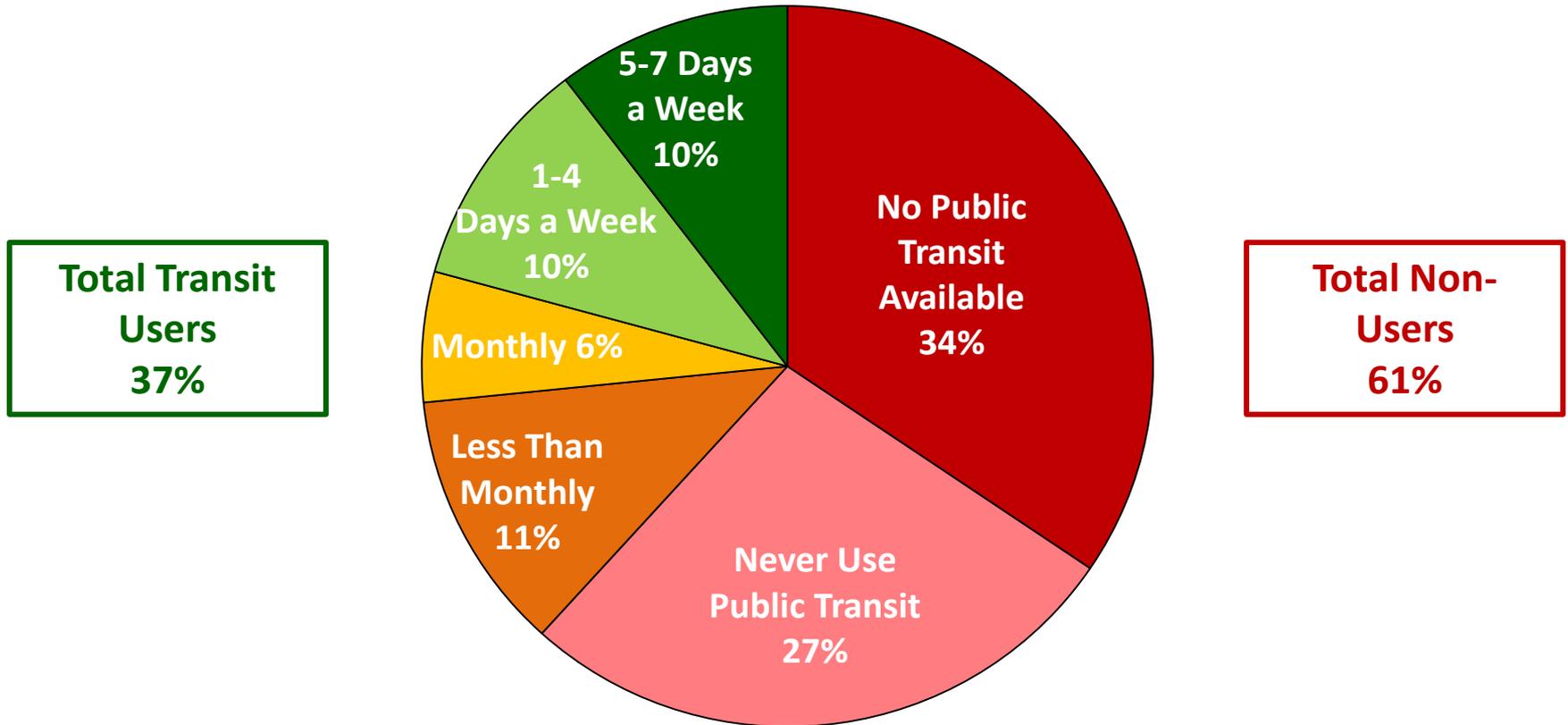
Proposals to Replace Gas-Tax Funding to Support Roads:



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

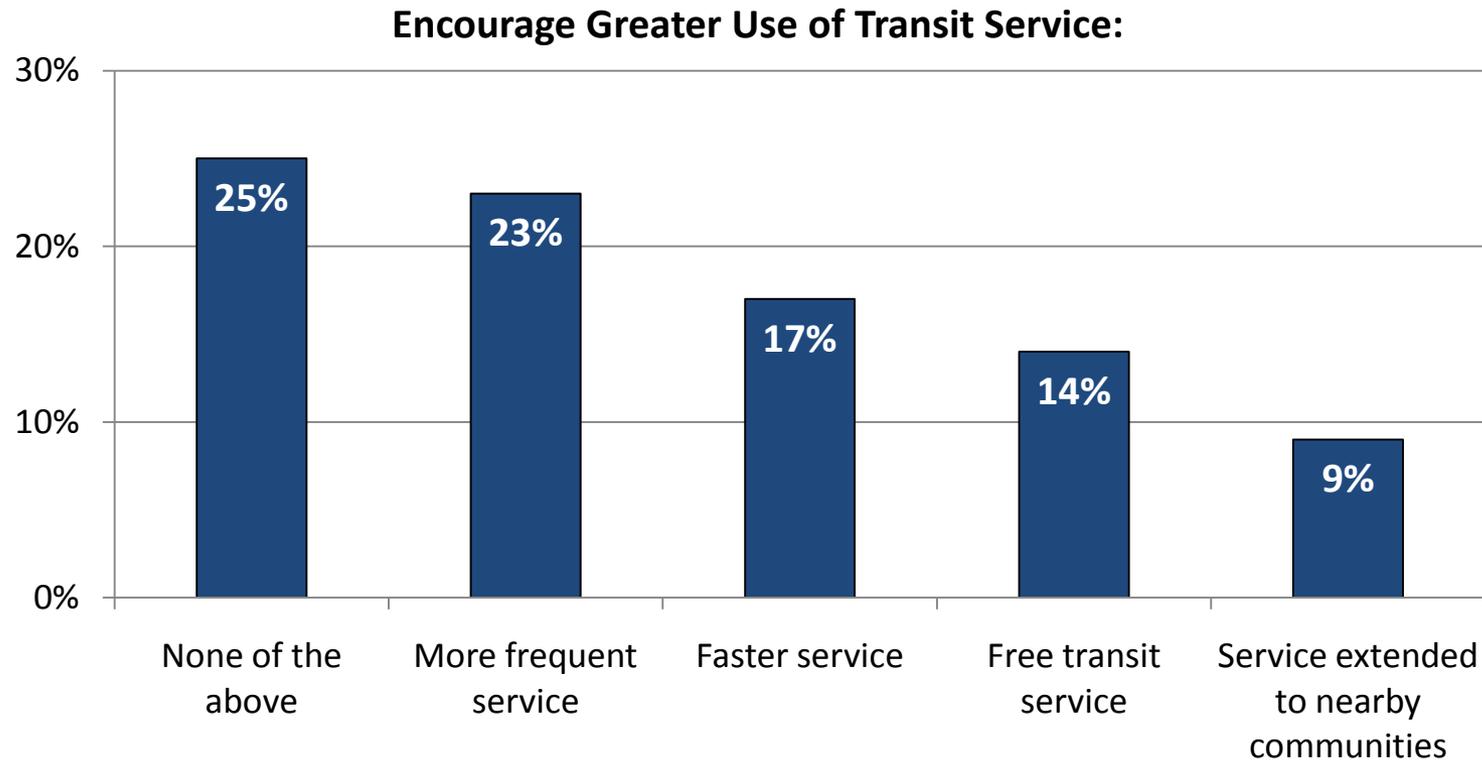
Public Transportation Use:



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

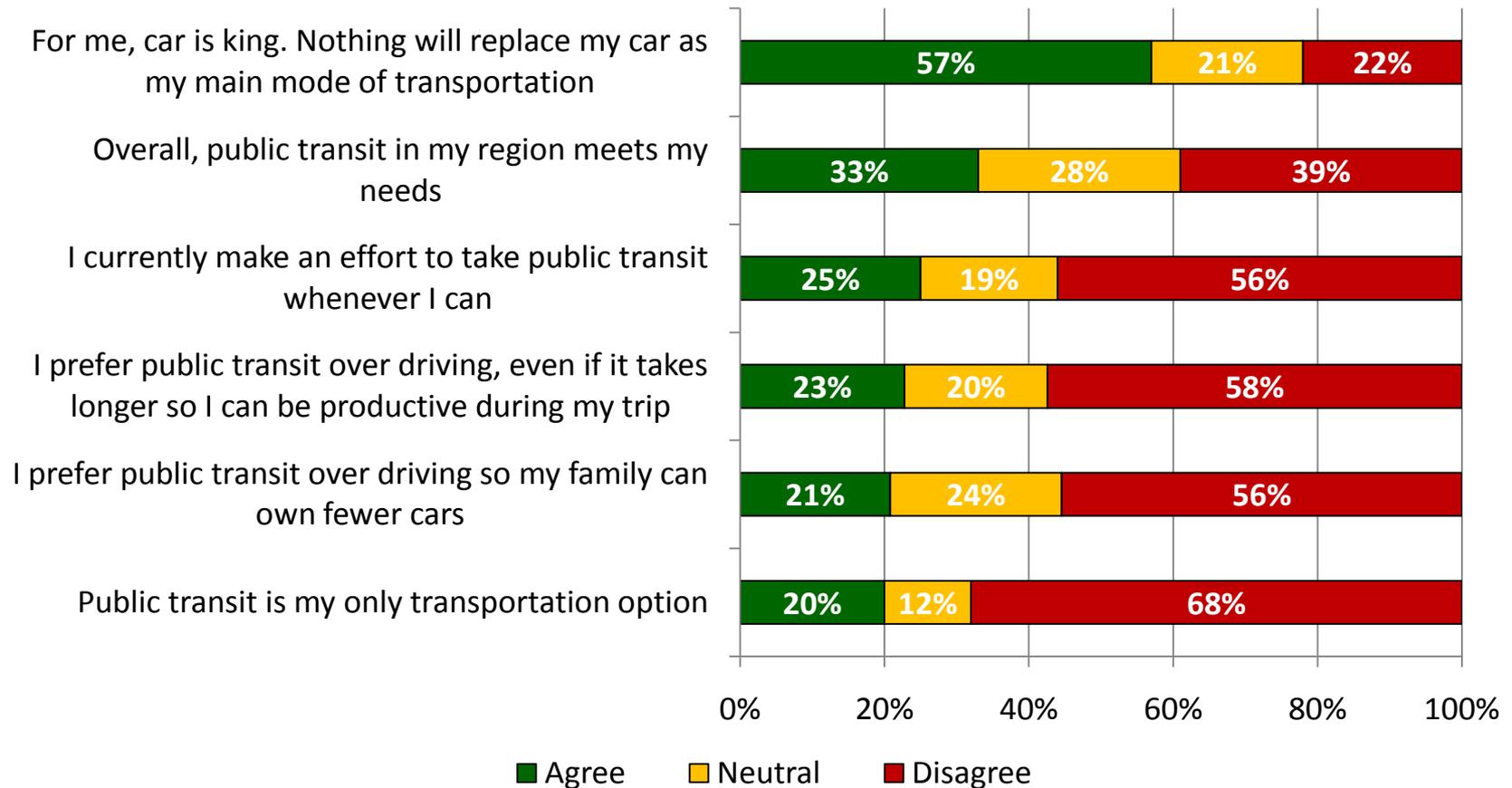
But plurality un-persuaded by any option



(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:

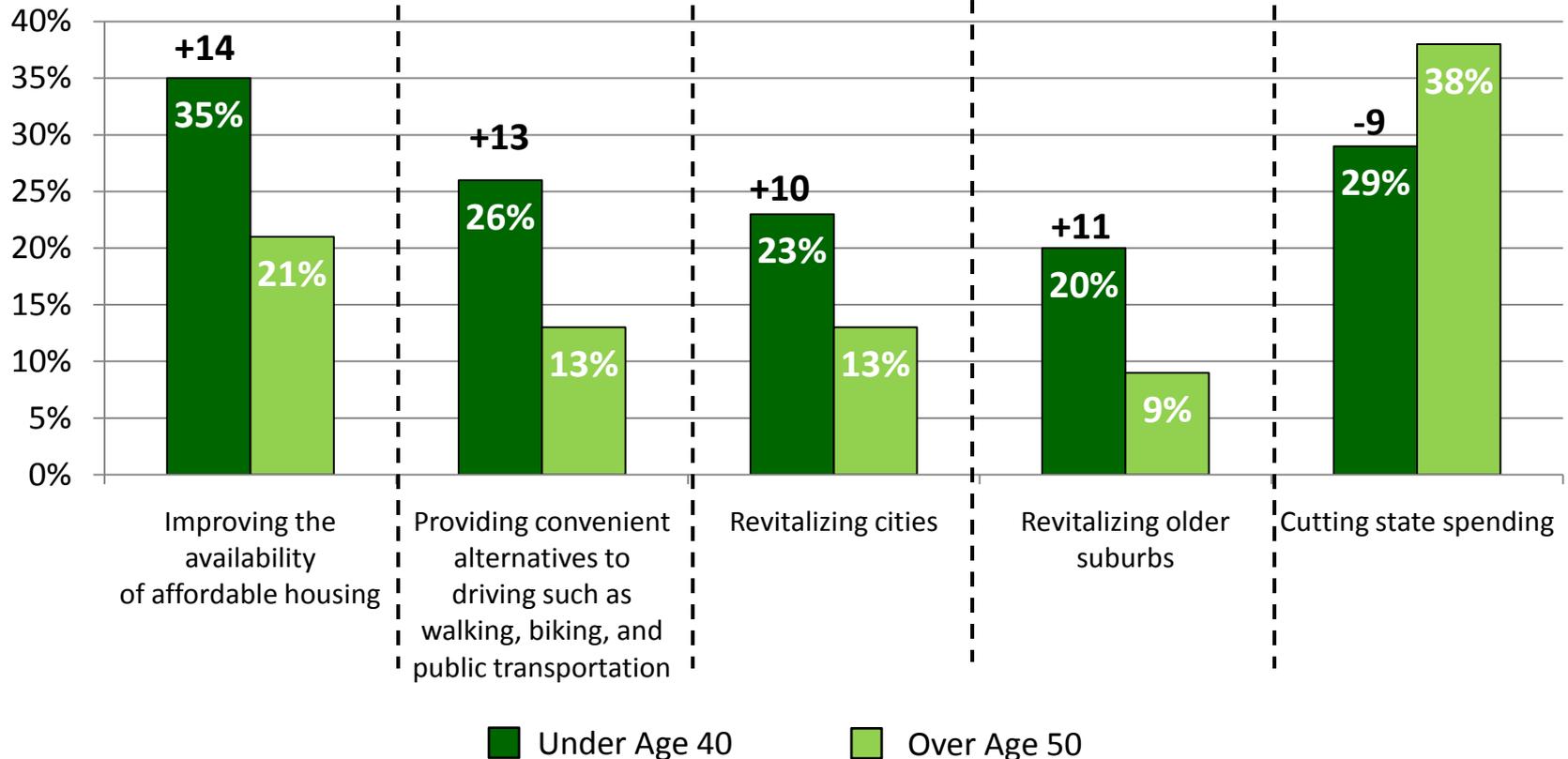


(IF YES IN TRANSIT) How strongly do you agree or disagree with each of the following statements.

*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

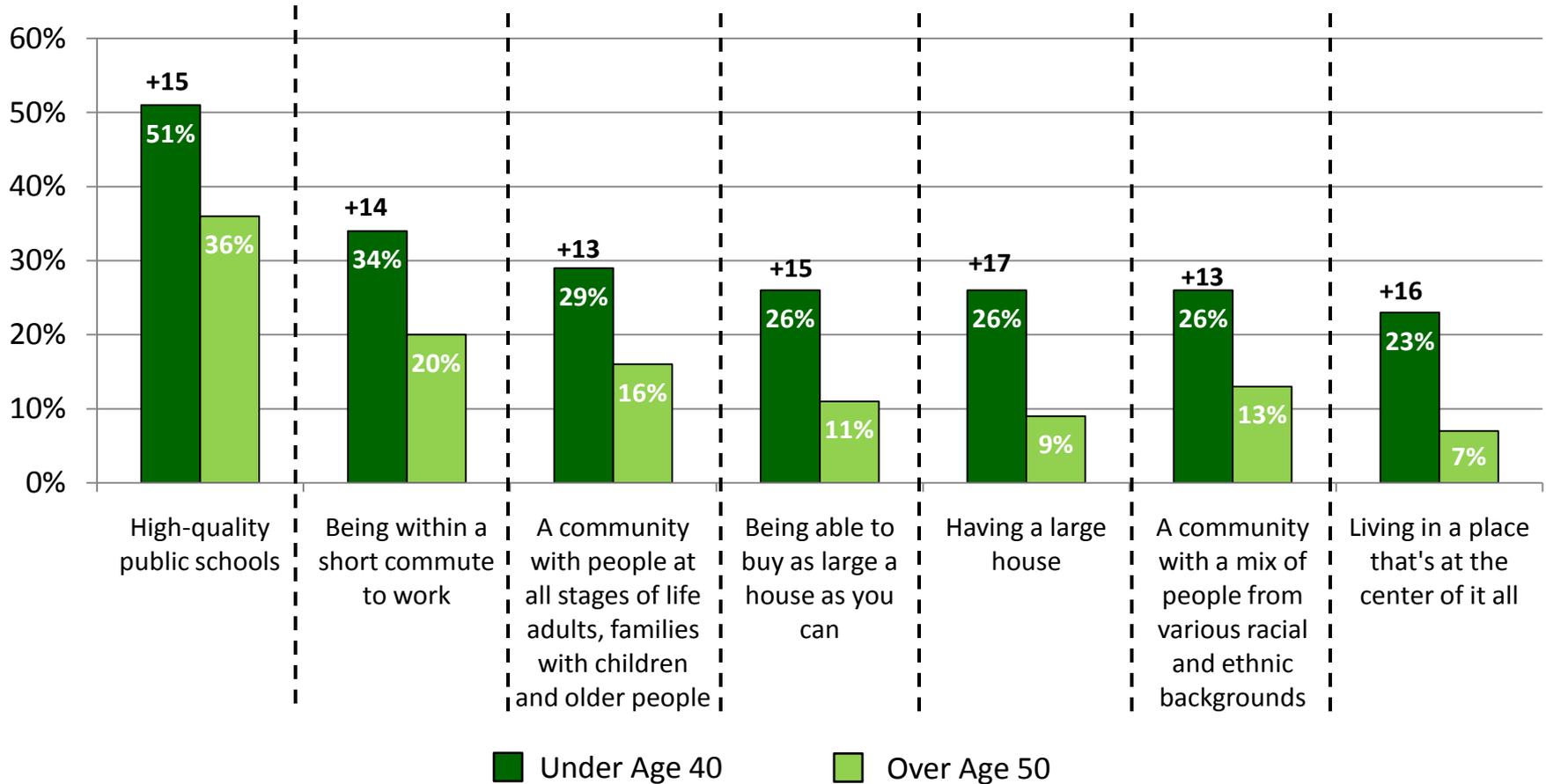
Extremely High Priorities for State Government: Differences by Age



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?

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

Important Factors in Deciding Where to Live by Age

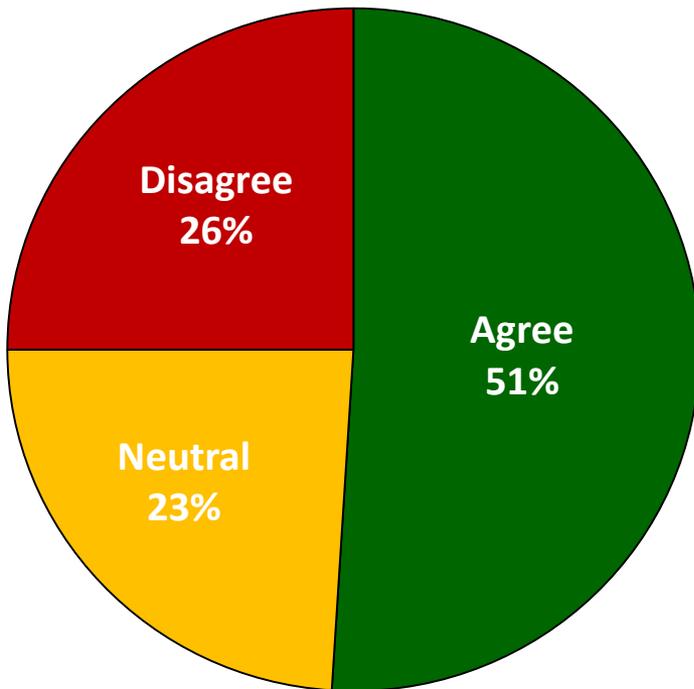


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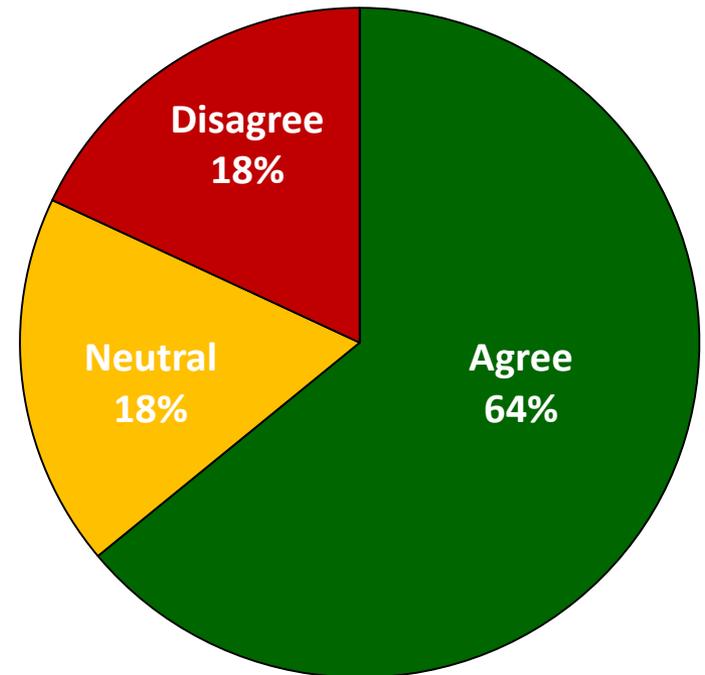
Younger Americans Less Likely to Agree That Car is King

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

Under Age 40



Over Age 50



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

Survey Methodology

Survey 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. The panel is large and diverse so as to minimize the risk of biases. Panelists are recruited via banner ads, invitations and messaging of all types and go through rigorous quality controls before being included in any sample. Panelists are incentivized to take surveys through a points system, whereby they can redeem points for cash, prizes and donations to charity.

Invitations of all types are used in order to bring in people with a diversity of motivations to take part in research. These include e-mail invitations, SMS and text messages, telephone alerts, banners and messaging on web sites and online communities of all types. To avoid self-selection bias, specific project details are not generally included in the invitation. Rather participants are invited to “take a survey.” The details are disclosed later, when a survey has been selected for them to take within the system.

In interpreting survey results, all sample surveys are subject to possible sampling error: that is, the results of a survey may differ from those which would be obtained if the entire population were interviewed. The size of the sampling error depends upon both the total number of respondents in the survey and the percentage distribution of responses to a particular question. For example, if a response to a given question to which all respondents answered was 50%, we could be 95% confident that the true percentage would fall within plus or minus 2.6% of this percentage or between 47.4% and 52.6%.