WHAT AMERICANS REALLY WANT

PORTER-NOVELLI
Survey Research

Rocky Mountain Land Use Institute, March 1, 2012

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Porter-Novelli

Porter-Novelli- global public relations firm

Annually, Porter Novelli conducts consumer research to track a variety of information about lifestyles and health behaviors.

Results combined from the 2003 Consumer Survey and the 2005 Health Surveys.

The 2003 survey had 5873 respondents and the 2005 survey included 4943.

Combined survey sample total of 10,816.

Data were post-weighted by gender, age, income, race, and household size to reflect the demographic proportions in the U.S. Census Current Population Survey for each year.

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Aggregated individuals into demographic subgroups.

Age

The age group 18-34 corresponds to a youthful population that is just starting out in life, building careers (including attending college), and starting families.

The age group 35-54 are:

Established in their careers

Have early to mature child-raising

More-or-less settled in their communities

The age group 55-69 for the most part are:

Empty-nesters

At the peak of their earning power

Least likely to relocate among all the age groups.

The age group 70+ represents the senior population:

High propensity to relocate

Down-sizing (sometimes several times)

Source: **Compiled by permission from Porter-Novelli.**

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Income

Income categories are based on HUD's state-level area median income (AMI) figures effective for the survey years, 2003 and 2005.

Assigned respondents to <80%-AMI for lower income, 80%-120% AMI for middle income, and >120 % AMI for upper income.

Households

Single persons

Households with more than one person without children

Households with more than one person with children

Transit

Because the familiarity of transit may influence attitudes, results were further analyzed according to the presence of existing transit. The level of geography available in this survey was at the state level so respondents living in states with transit were considered to be transit responders.

Source: **Compiled by permission from Porter-Novelli.**

Important to Walk/Bike to…

	Work	Shopping	Transit
All	23%	22%	23%
Transit	23%	24%	25%
No Transit	22%	19%	19%

Important to Walk/Bike to Work

	All	HH Type			Age				Income		
		HH Single No Children	HH>1 No Children	HH>1 Children	18-34	35-54	55-69	70+	Low	Mid	High
All	23%	28%	22%	20%	24%	21%	23%	24%	28%	19%	16%
Transit	23%	27%	23%	21%	26%	21%	23%	23%	29%	20%	17%
No Transit	22%	28%	21%	18%	19%	21%	24%	26%	26%	18%	15%

	Age 18-34			Age 35-54			Age 55-69			Age 70+		
	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High
HH Single	32%	22%	17%	31%	22%	26%	30%	23%	8%	25%	21%	0%
HH>1 No Children	27%	23%	20%	28%	18%	16%	28%	19%	16%	26%	19%	22%
HH> 1 Children	25%	15%	15%	27%	18%	14%	29%	26%	15%			

Important to Walk/Bike to Shopping

	All	HH Type			Age				Income		
	All	HH Single No Children	HH>1 No Children	HH>1 Children	18-34	35-54	55-69	70+	Low	Mid	High
All	22%	29%	21%	18%	22%	20%	24%	25%	27%	18%	16%
Transit	24%	30%	22%	20%	25%	22%	25%	26%	29%	19%	18%
No Transit	19%	28%	18%	15%	17%	18%	22%	24%	24%	16%	12%

	Age 18-34			Age 35-54			Age 55-69			70+		
	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High
HH Single	32%	14%	32%	31%	26%	28%	34%	19%	30%	28%	14%	0%
HH>1 No Children	23%	20%	17%	26%	15%	16%	27%	19%	16%	27%	19%	20%
HH>1 Children	20%	19%	13%	24%	17%	14%	30%	19%	14%			

Important to Walk/Bike to Transit

	All	HH Type			Age				Income		
	All	HH Single No Children	HH>1 No Children	HH>1 Children	18-34	35-54	55-69	70+	Low	Mid	High
All	23%	32%	21%	19%	26%	21%	22%	24%	28%	17%	17%
Transit	25%	30%	22%	20%	29%	22%	24%	25%	31%	19%	20%
No Transit	19%	28%	18%	15%	19%	18%	19%	23%	24%	14%	12%

	Age 18-34			Age 35-54			Age 55-69			Age 70+		
	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High
HH Single	37%	17%	33%	37%	19%	30%	30%	31%	30%	29%	21%	11%
HH>1 No Children	29%	19%	27%	26%	17%	16%	23%	21%	14%	24%	13%	18%
HH>1 Children	24%	13%	16%	25%	15%	14%	28%	16%	13%			

Smart Growth Communities

Communities with a town design in place of today's suburbs.

Town center that is surrounded by residential neighborhoods.
- small shops
- restaurants
- government buildings
- churches
- public transit (bus, rail) stops.

Residential neighborhoods are clustered around the town center, providing easy access to work and shopping.

Each neighborhood has a variety of housing types
- apartments
- townhomes
- single family homes

Houses are built on smaller lots and are closer to the street.

The community includes a network of parks and trails for walking and biking

Streets are designed to accommodate:
- cars
- pedestrians
- bicyclists

Residential streets:
- Narrower
- Slower
- Quieter
- Sidewalks
- trees
- on-street parking

In commercial areas:
- sidewalks are wide and comfortable
- streets are lined with trees
- parking lots are less conspicuous.

It has a clearly defined boundary to preserve open space for parks, farmlands, and forests.

Support for Smart Growth Communities

		HH Type			Age				Income		
	All	HH Single No Children	HH>1 No Children	HH>1 Children	18-34	35-54	55-69	70+	Low	Mid	High
All	51%	55%	48%	52%	59%	50%	45%	41%	50%	52%	52%
No Transit	48%	53%	44%	49%	52%	48%	47%	38%	48%	47%	49%
Transit	53%	56%	50%	53%	63%	51%	45%	43%	51%	54%	54%

	Age 18-34			Age 35-54			Age 55-69			Age 70+		
	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High
Single	61%	74%	63%	51%	59%	63%	52%	64%	56%	43%	46%	66%
HH>1 No Children	57%	60%	67%	47%	45%	52%	37%	45%	45%	37%	36%	44%
HH>1 Children	55%	60%	57%	50%	45%	51%	45%	49%	44%			

Live in a Smart Growth Community

	All	HH Type			Age				Income		
	All	HH Single No Children	HH>1 No Children	HH>1 Children	18-34	35-54	55-69	70+	Low	Mid	High
All	47%	51%	45%	47%	56%	45%	41%	39%	48%	46%	46%
No Transit	44%	50%	41%	44%	49%	44%	41%	39%	46%	42%	43%
Transit	49%	51%	46%	49%	59%	46%	41%	39%	49%	48%	48%

	Age 18-34			Age 35-54			Age 55-69			Age 70+		
	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High
HH Single	57%	64%	54%	49%	55%	53%	48%	55%	52%	39%	56%	44%
HH>1 No Children	61%	52%	59%	45%	40%	47%	33%	40%	39%	37%	35%	41%
HH>1 Children	52%	52%	53%	48%	40%	44%	48%	44%	39%			