WHAT AMERICANS WANT

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Surveys

Porter-Novelli -- 2003 + 2005 surveys = 10,816 respondents

National Association of Realtors (2011) -- 2000+ respondents

Public Policy Institute of California (2001, 2002, 2004) – 2000+ respondents

Arizona State University (2008) – 800 respondents

National Foundation for Credit Counseling Survey (2009)

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

Survey Demographics

Age

The age group 18-34 → Emerging professionals & families

The age group 35-54 are → Mature professionals & families

The age group 55-69 → Peak income; empty nesting

The age group 70+ → Retiring; downsizing

Income

HUD's state-level area median income (AMI)

<80%-AMI → lower income

80%-120% AMI → middle income

>120 % AMI → upper income.

Survey Demographics

Households

- Single person households
- 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.

Demand for Walkable, Mixed-Used "Smart Growth" Neighborhoods

Demographic Group	Prefer Mixed-Use With Walkability (PPIC 2004/ ASU 2007)	Small Home with Short Commute (PPIC 2004/ ASU 2007)	Would Support a Smart Growth Community (PN 2003 & 2005)	Want to Live in a Smart Growth Community (PN 2003 & 2005)
All	50%	50%	51%	47%
Age				
18-34	55%	49%	55%	51%
35-54	49%	55%	48%	45%
55-69	46%	66%	52%	47%
70+	44%	63%	59%	56%
Income				
<80% AMI	58%	59%	50%	45%
80%-120% AMI	48%	56%	45%	41%
>120% AMI	44%	52%	41%	39%
Household Type				
Single Person HH*	50%	61%	50%	48%
HH Without Children	51%	61%	52%	46%
HH With Children	50%	50%	52%	46%

Source: Compiled by Metropolitan Research Center, University of Utah, using PPIC and ASU surveys, and by permission from Porter-Novelli.

Important to Walk/Bike to…

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

Important to Walk/Bike to Work/Errands

Demographic Group	Important/ Very Important → Work	Important/Very Important → Errands
All	23%	22%
Age		
18-34	24%	22%
35-54	21%	20%
55-69	23%	24%
70+	24%	25%
Income		
<80% AMI	28%	27%
80%-120% AMI	19%	18%
>120% AMI	16%	16%
Household Type		
Single Person HH	28%	29%
HH No Children	22%	21%
HH With Children	20%	18%

Source: Adapted by Nelson et al. from Porter-Novelli (2003; 2005)

Supply & Demand Comparison

Mode and Destination	Supply	Demand
Walk or Bike to Work	**4%**	**23%**
Walk or Bike for Errands	**10%**	**22%**

***Source*: Supply from NHTS 2009 (2011); demand from Porter-Novelli (2003, 2005)**

Observed Walk/Bike Share Within 1-Mile

Year	Walk/Bike to Work Less than 1 Mile	Walk/Bike to Errands Less than 1 Mile
1995	25%	26%
2001	34%	35%
2009	37%	42%
Change 1995-2009	45%	59%

Source: National Household Travel Survey 2009 (2011).

National Foundation for Credit Counseling Survey (2009)

- Lack of confidence in ability to buy a home, improve current housing situation, or trust homeownership to be a significant part of their wealth.
- About one-third do not think they will ever be able to buy a home.
- 42% who once owned a home but no longer do, do not think they will be able to buy another one.
- Of those who still own a home, 31 percent do not think they'll ever be able to upgrade or buy a vacation home.

NAR 2011 Survey Highlights

Question	US
Prefer to **own or rent an apartment or townhouse** with **easy walk** to shops and restaurants and have a shorter commute to work.	**38%**
Prefer a neighborhood with a **mix of** single family detached **houses**, townhouses, apartments and condominiums on various sized lots; Almost all of the streets have **sidewalks**; Places such as shopping, restaurants, a library, and a school are within a few blocks of the home and can either **walk or drive**; **Parking is limited** when driving to local stores, restaurants and other places; **Public transportation**, such as bus, subway, light rail, or commuter rail, **is nearby**.	**56%**
Public transit is very **important** or somewhat important.	**47%**

***Source*: Adapted from National Association of Realtors (2011). (Questions paraphrased.)**

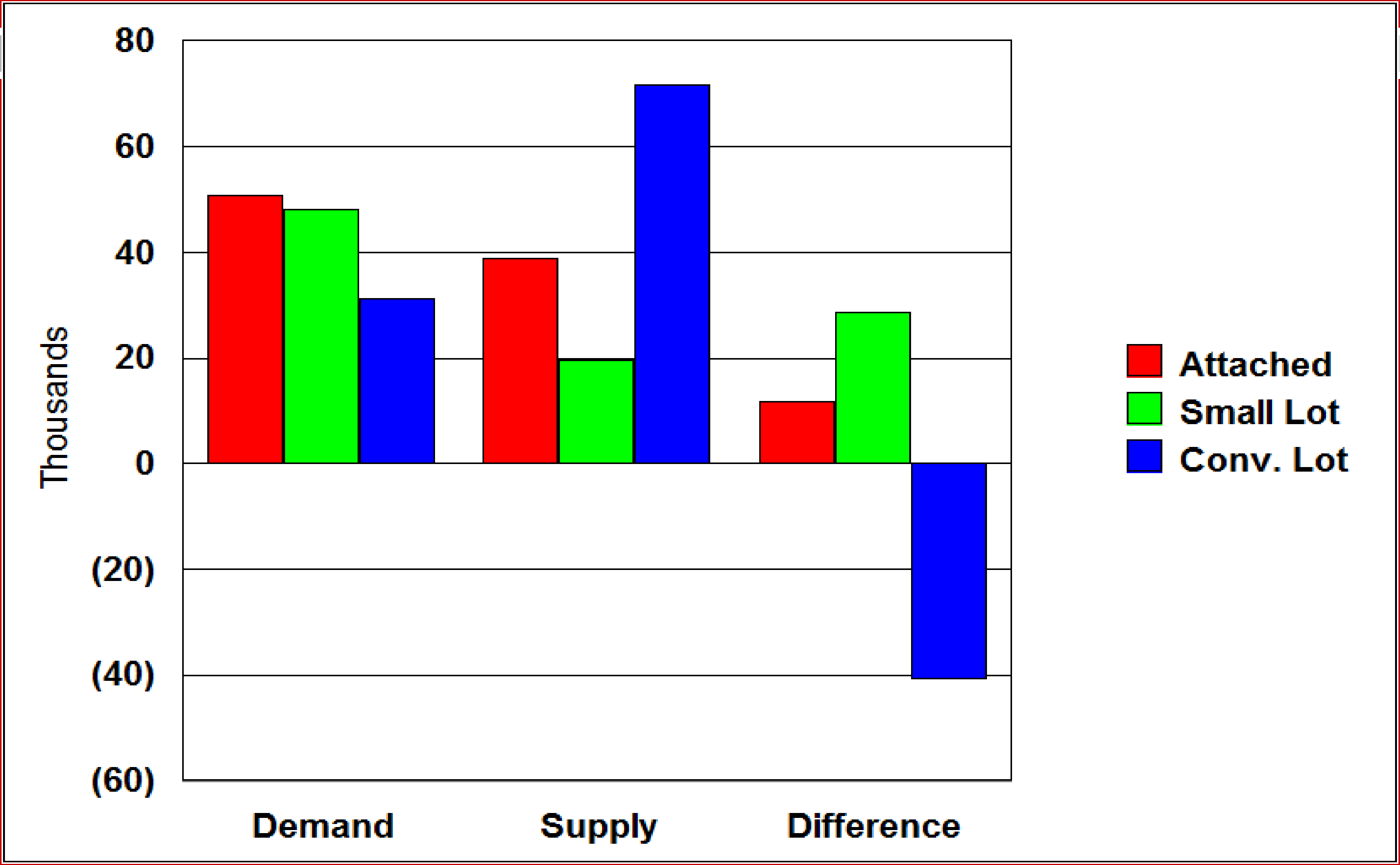
US Preference Demand vs. Supply

House Type	Nelson	RCLCo*	NAR	AHS
Attached	38%	34%	39%	28%
Small Lot	37%	35%	37%	29%
Large Lot	25%	31%	24%	43%

**Owner demand only*

***Source*: Nelson (2006), RCLCo (2008), NAR (2011), American Housing Survey (2010)**

US Housing Supply/Demand 2009



Source: Arthur C. Nelson, Presidential Professor & Director, Metropolitan Research Center, University of Utah.

Households by Life Stage, 1970-2030

Life-Stage	1970	2010	Share	2030	Share	2010-2030	Share
Apartments/Starter Homes (20-34)	25%	25	21%	28	19%	3	12%
Mature Family Homes (35-59)	38%	46	39%	49	33%	3	*11%*
Empty Nesting/Downsizing (60-74)	29%	35	30%	48	33%	13	45%
Senior/Assisted/Nursing (75+)	8%	12	10%	21	15%	9	32%

***Source*: Arthur C. Nelson, Presidential Professor & Director, Metropolitan Research Center, University of Utah.**

Changing Dreams & Realities

That was Then	**This is Now**
40-year career	Free agent/independent contractor
Uniform housing	Life-cycle housing
Far away from job	Short commute, walk/bike/transit
Cheap gas	Maximize mobility options
Transit is for “those” people	Where’s my transit?
All homes gain in value	Buy only quality locations
Love my subdivision	Want a “real” place


Thank You