

# **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)**

# 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)
<b>All</b>	<b>50%</b>	<b>50%</b>	<b>51%</b>	<b>47%</b>
<b>Age</b>				
18-34	55%	49%	55%	51%
35-54	49%	55%	48%	45%
55-69	46%	66%	52%	47%
70+	44%	63%	59%	56%
<b>Income</b>				
<80% AMI	58%	59%	50%	45%
80%-120% AMI	48%	56%	45%	41%
>120% AMI	44%	52%	41%	39%
<b>Household Type</b>				
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
<b>All</b>	<b>23%</b>	<b>22%</b>
<b>Age</b>		
18-34	24%	22%
35-54	21%	20%
55-69	23%	24%
70+	24%	25%
<b>Income</b>		
<80% AMI	28%	27%
80%-120% AMI	19%	18%
>120% AMI	16%	16%
<b>Household Type</b>		
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

<b>Mode and Destination</b>	<b>Supply</b>	<b>Demand</b>
Walk or Bike to Work	<b>4%</b>	<b>23%</b>
Walk or Bike for Errands	<b>10%</b>	<b>22%</b>

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

# Observed Walk/Bike Share Within 1-Mile

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

*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	CA
Prefer to <b>own or rent an apartment or townhouse</b> with <b>easy walk</b> to shops and restaurants and have a shorter commute to work.	<b>38%</b>	<b>42%</b>
<b>Prefer a neighborhood</b> with a <b>mix of</b> single family detached <b>houses</b> , townhouses, apartments and condominiums on various sized lots; Almost all of the streets have <b>sidewalks</b> ; Places such as shopping, restaurants, a library, and a school are within a few blocks of the home and can either <b>walk or drive</b> ; <b>Parking is limited</b> when driving to local stores, restaurants and other places; <b>Public transportation</b> , such as bus, subway, light rail, or commuter rail, <b>is nearby</b> .	<b>56%</b>	<b>60%</b>
<b>Public transit is very important</b> or somewhat important.	<b>47%</b>	<b>71%</b>

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

# California Preference for Multistory, Multifamily Housing/High-Density with Transit

<b>State</b>	<b>Central Valley</b>	<b>Bay Area</b>	<b>Los Angeles</b>	<b>Other Southern California</b>
<b>32%</b>	<b>25%</b>	<b>37%</b>	<b>36%</b>	<b>28%</b>

*Source: Adapted from Public Policy Institute of California (2001, 2002).*

# Preference for Small Single-Family Detached Homes on Small Lots with Short Commute

<b>State</b>	<b>Central Valley</b>	<b>Bay Area</b>	<b>Los Angeles</b>	<b>Other Southern California</b>
<b>51%</b>	<b>44%</b>	<b>59%</b>	<b>50%</b>	<b>49%</b>

*Source: Adapted from Public Policy Institute of California (2001, 2002, 2004)*

# Preference for Condominium or Townhouse if Convenient to Transit

<u>MPO</u>	<u>Preferred (%)</u>
SACOG	22
MTC/ABAG	35
SCAG	26
SANDAG	32
Largest MPOs	26

*Source: Adapted from Public Policy Institute of California (2004)*

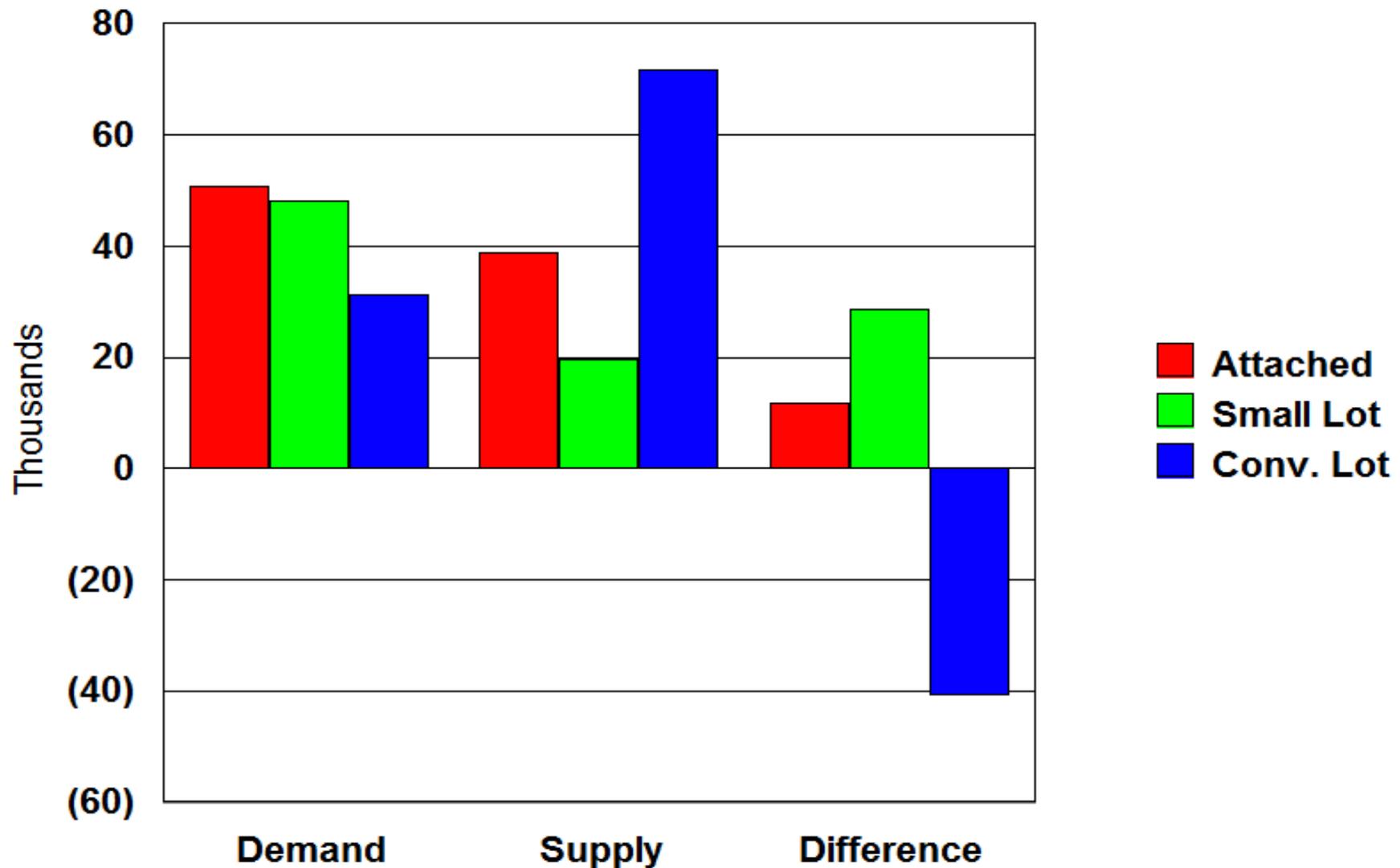
# US Preference Demand vs. Supply

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



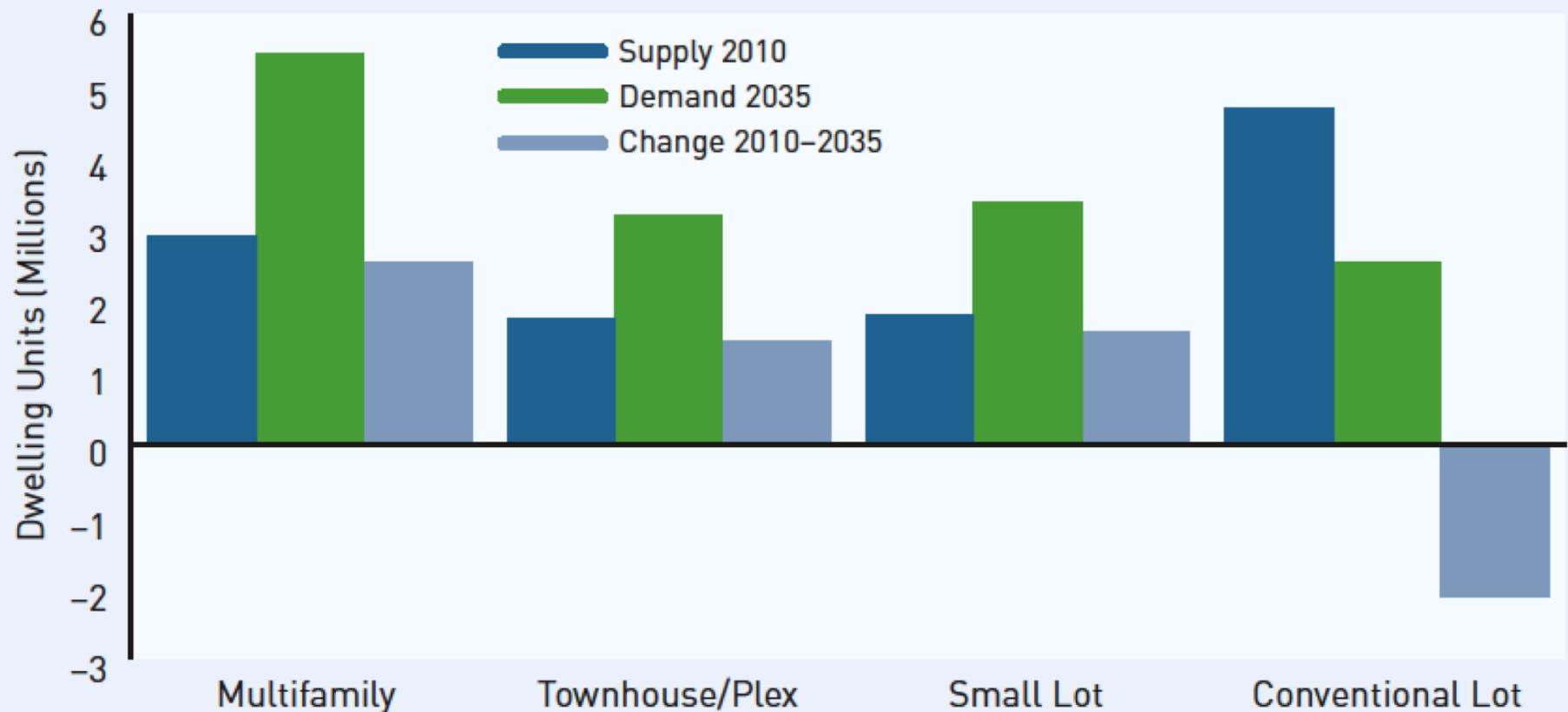
Source: Arthur C. Nelson, Presidential Professor & Director, Metropolitan Research Center, University of Utah.

# NAR National and California Demand by Type

House Type	NAR National Demand 2011	NAR California Demand 2011
Attached	39%	42%
Small Lot	37%	36%
Other Lot	24%	22%

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

**FIGURE 1 Demand in 2035 for Residential Units in the Largest Four Metropolitan Areas by Major Category, Compared to Supply in 2010**



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

# Changing Dreams & Realities

## That was Then

40-year career

Uniform housing

Far away from job

Cheap gas

Transit is for “those” people

All homes gain in value

Love my subdivision

## This is Now

Free agent/independent contractor

Life-cycle housing

Short commute, walk/bike/transit

Maximize mobility options

Where’s my transit?

Buy only quality locations

Want a “real” place

***Thank You***