

CENTRAL INDIANA

2018 COMMUNITY PREFERENCE SURVEY



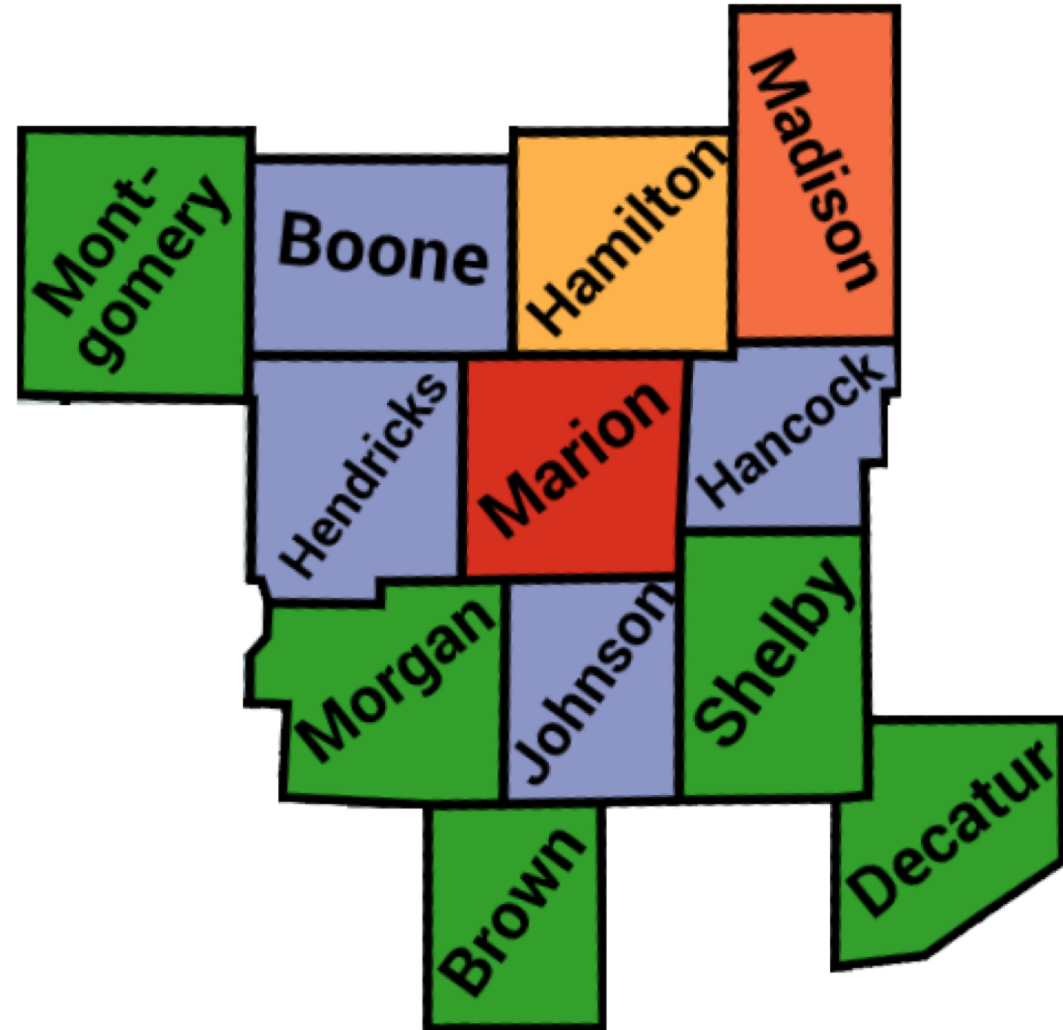
Central Indiana Smartgrowth Survey

August 2018

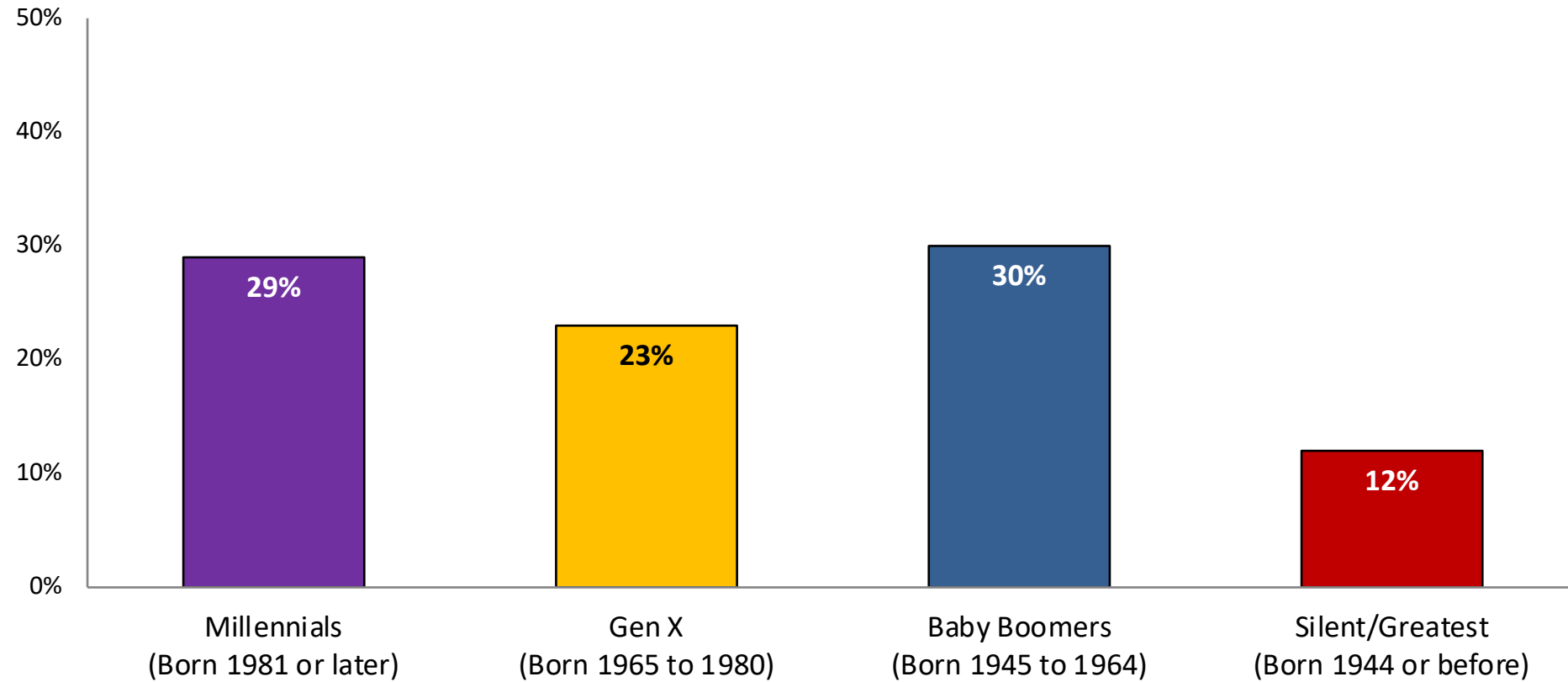
American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 2,163 adults, age 18 or older. The survey was conducted from August 2-26, 2018. The sample was randomly selected from TargetSmart's enhanced voter file. Fifty-two percent of respondents were reached on wireless phones, thirteen percent on VOIP phones, and thirty-six percent on landlines. Quotas were assigned to reflect the demographic distribution of voting age population in Indiana. The data were down-weighted to 1,750, and were weighted by gender, age, race, partisan score, county, and township to ensure an accurate reflection of the population. The overall margin of error is +/- 2.3%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding.

Regional Definitions

- Marion County
- Hamilton County
- Madison County
- Suburban counties
- Rural counties



Distribution of Sample by Generation

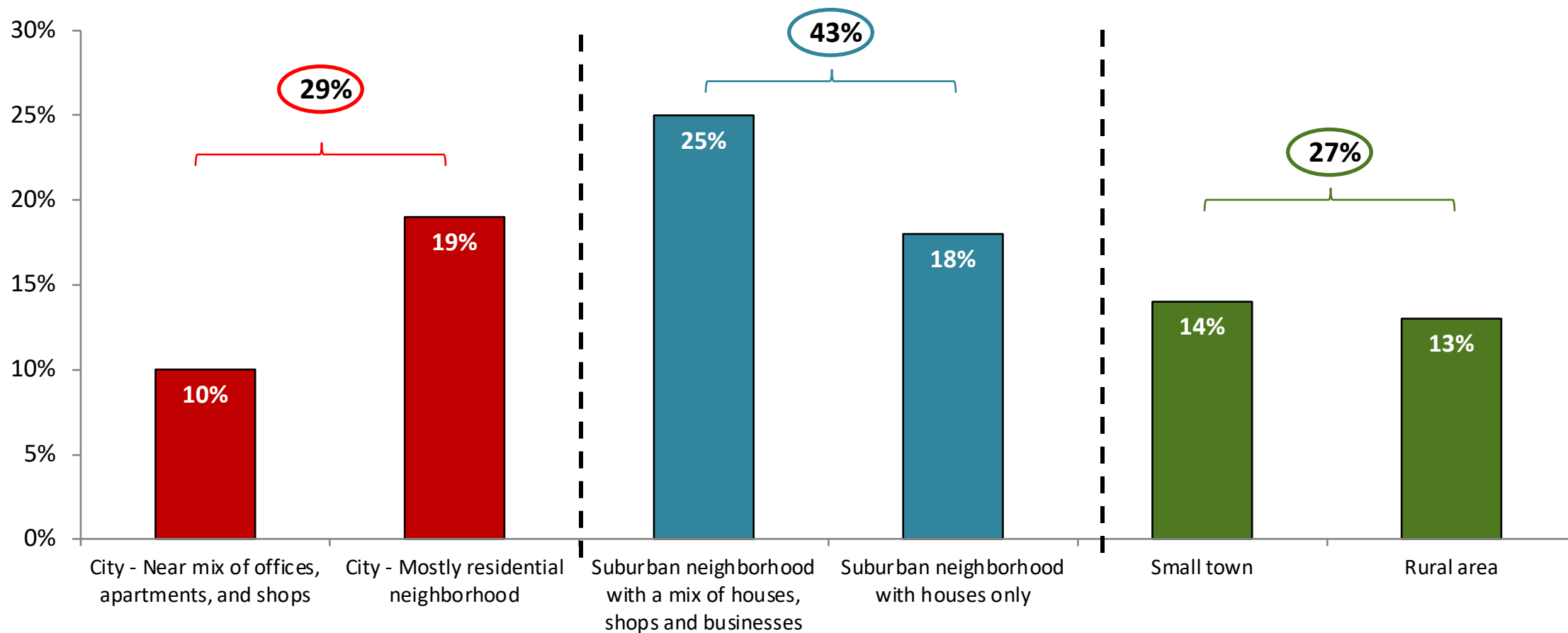


Diverse Communities

Greater Indianapolis Area is Diverse in Community Options

Over four-in-ten live in the suburbs; over a third live in mixed-use communities

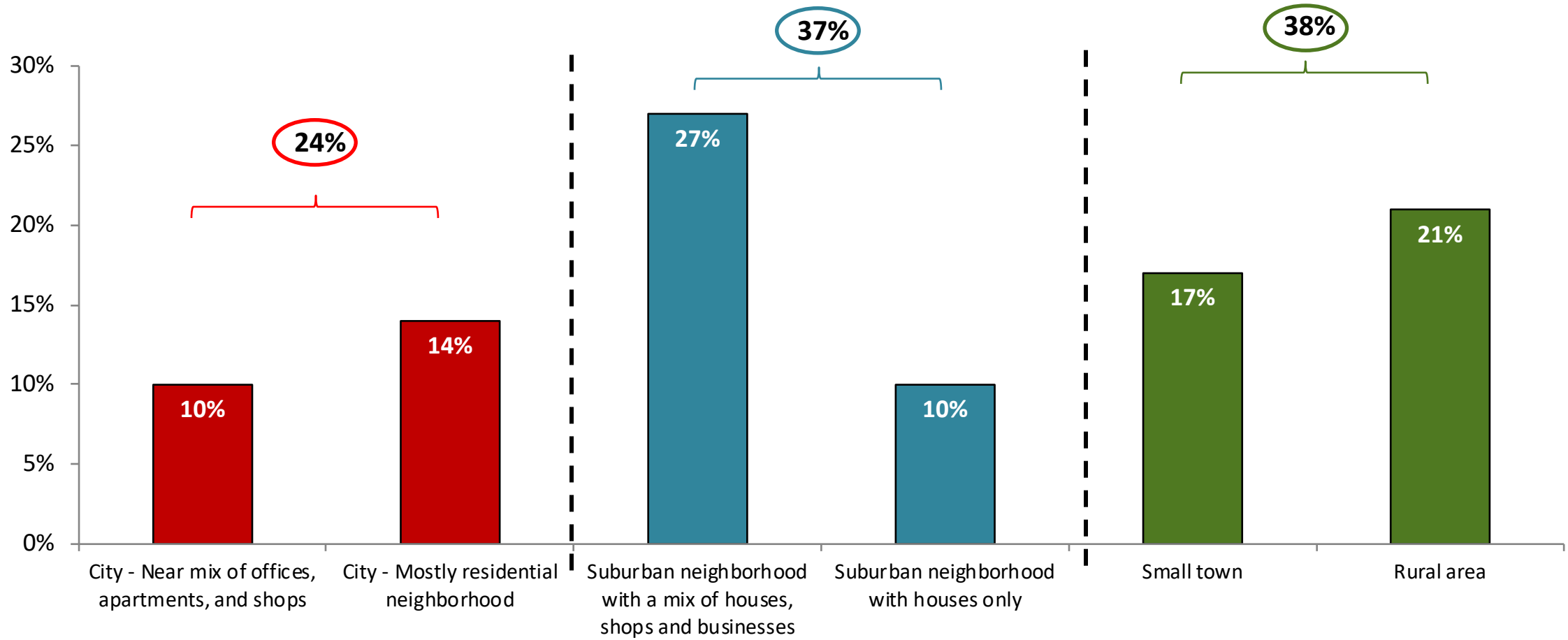
Area Where You Currently Live



Central Indianans Want to Live in a Variety of Communities

Plurality prefer mixed-use suburbs; equal numbers want to live in suburbs as in small town or rural area

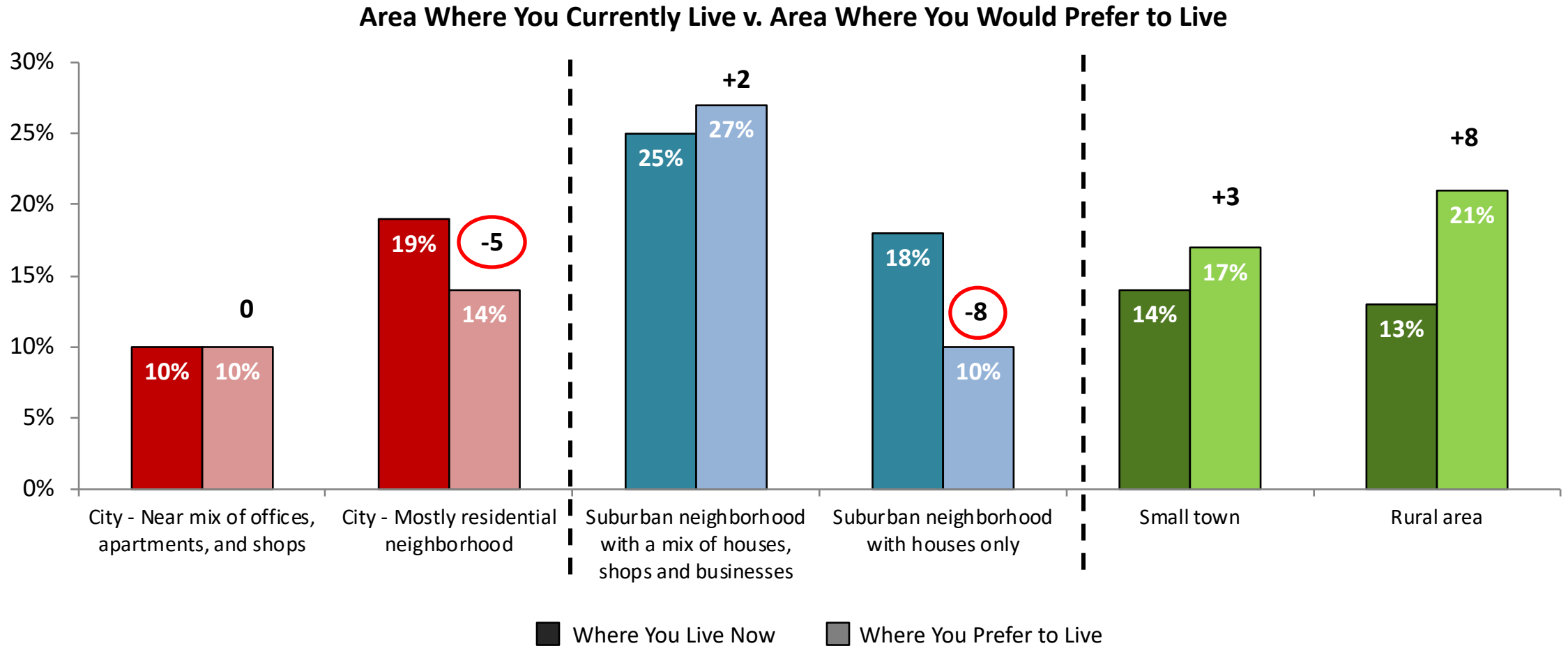
Area Where People Would Prefer to Live



If you could live anywhere you wanted, in which type of the following locations would you most like to live?

Fewer Prefer Residential-Only City or Suburbs than Live There

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



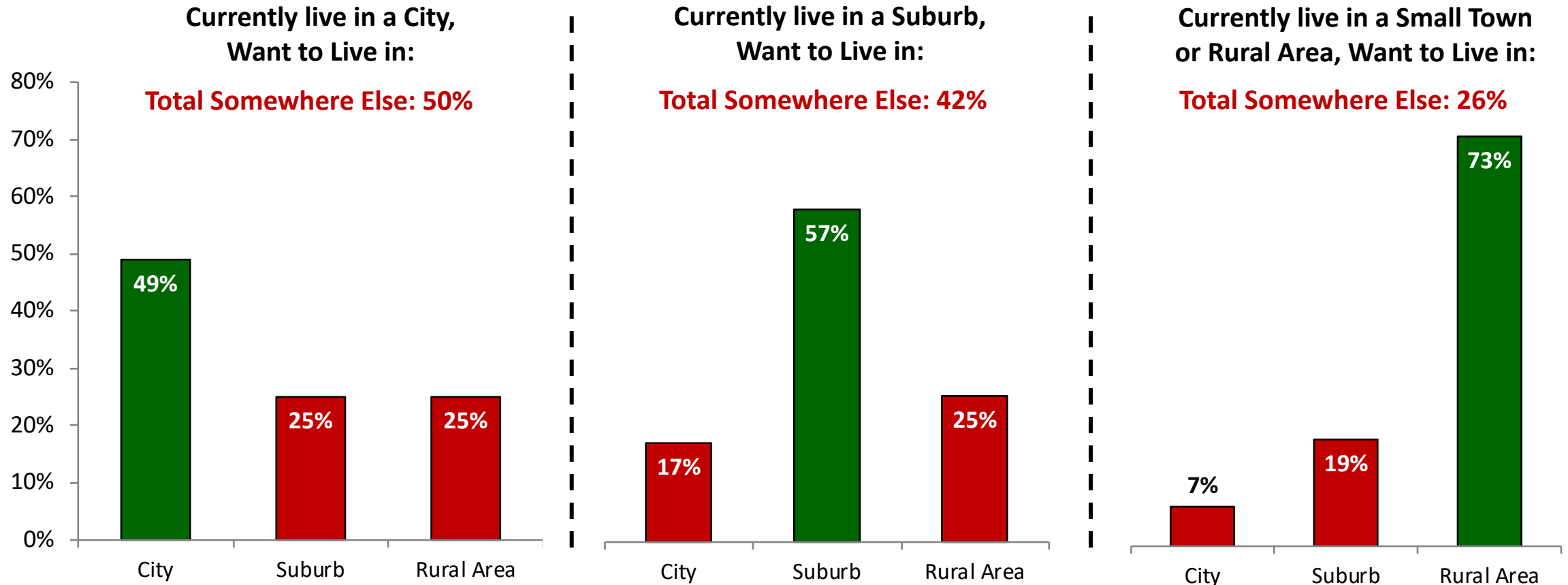
Which of the following best describes the place where you live:

If you could live anywhere you wanted, 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

City residents are more conflicted; small town and rural residents are especially content.

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



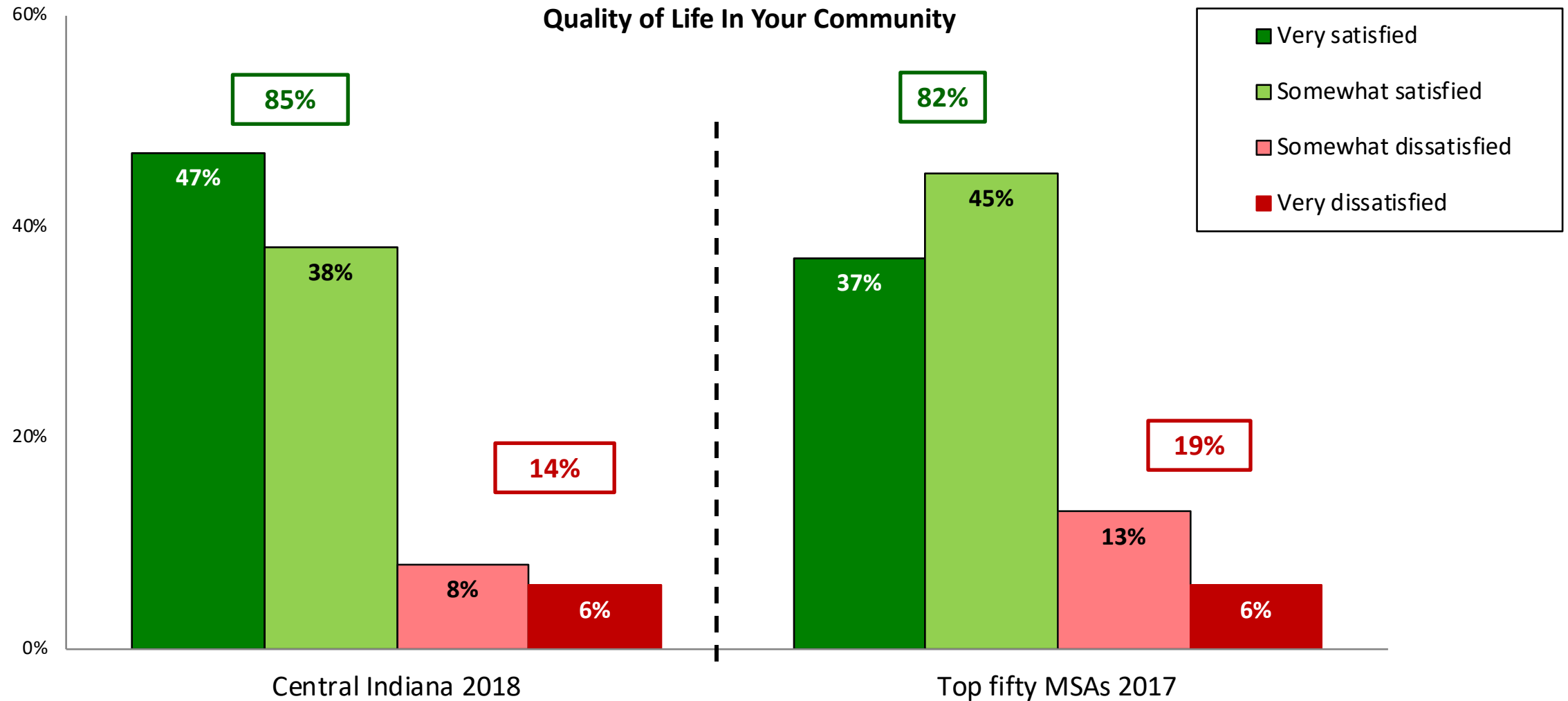
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Quality of Life

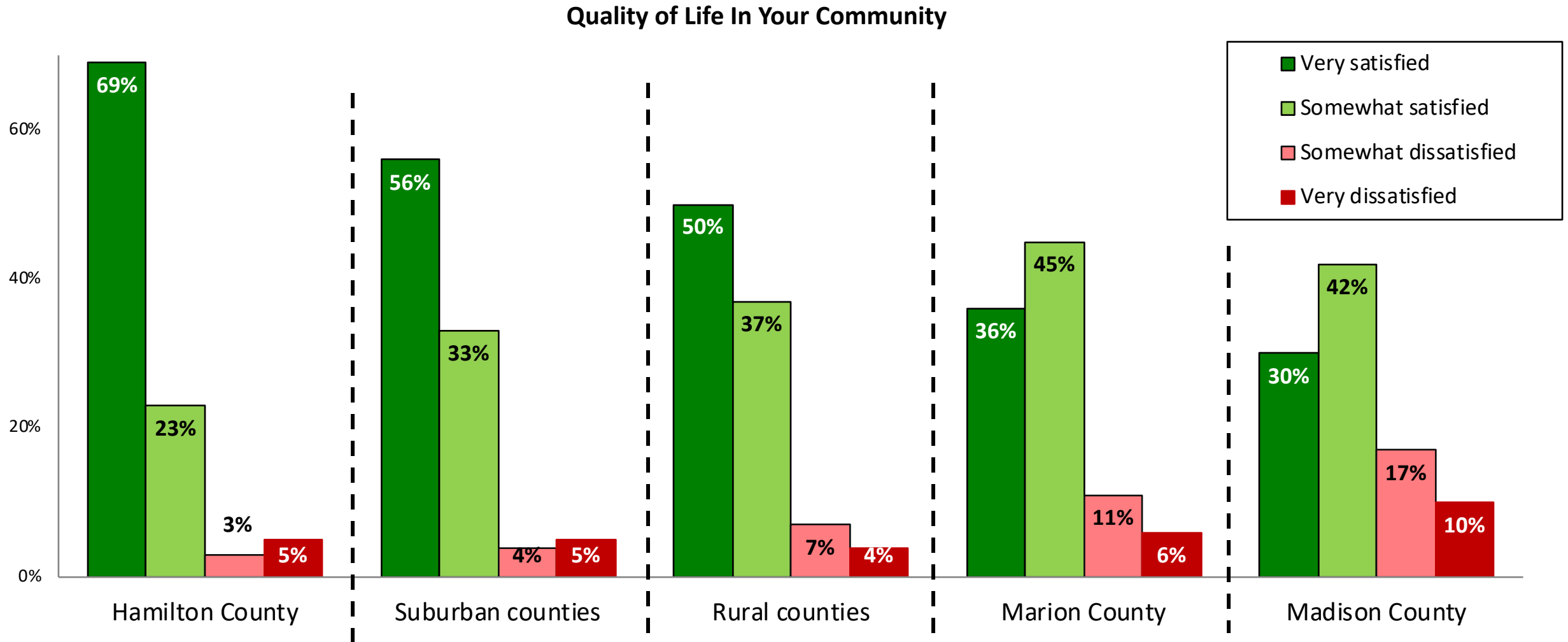
Central Indianans are Highly Satisfied with their Quality of Life

They are more likely to be VERY satisfied than those in top 50 MSAs

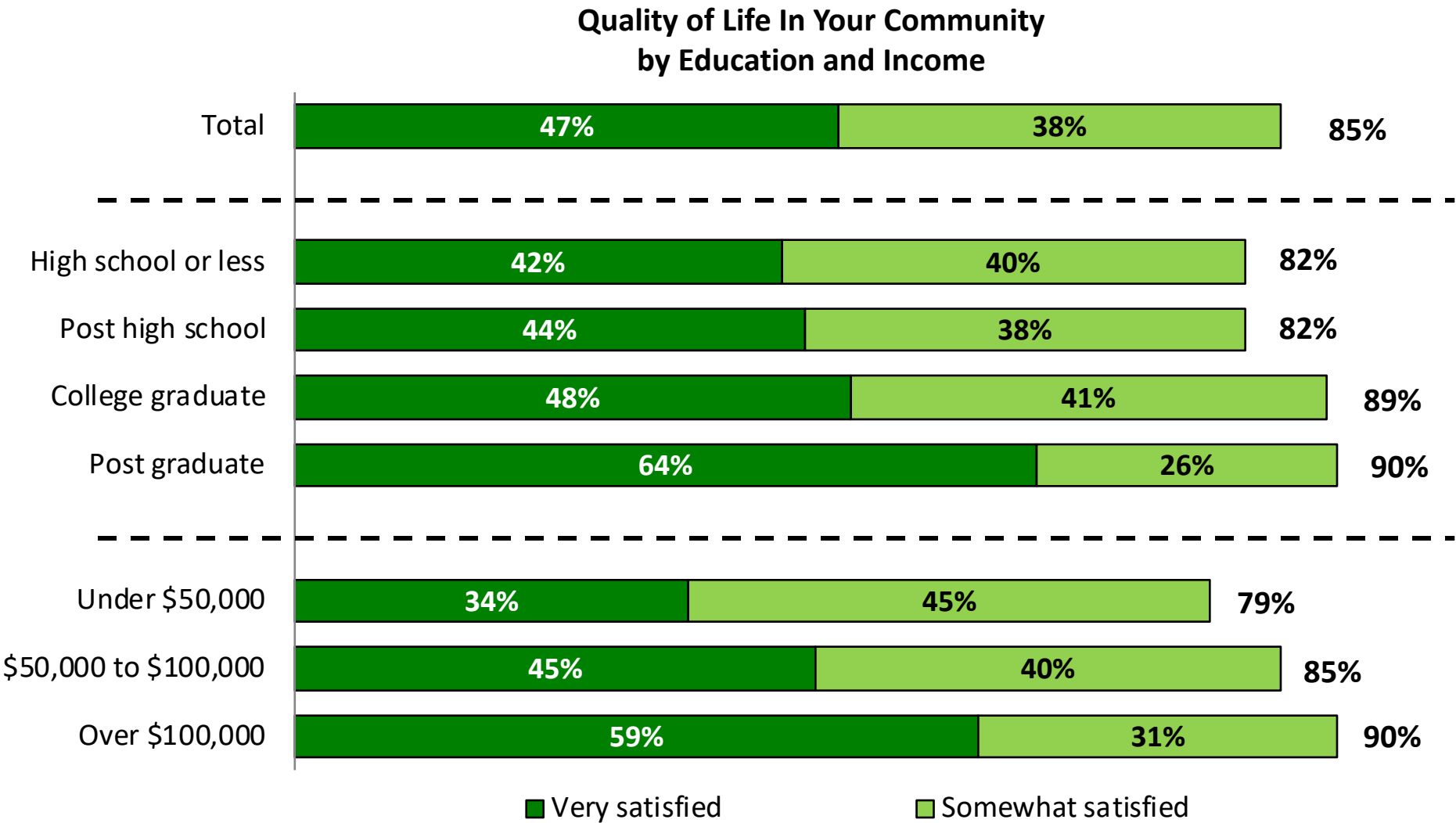


Satisfaction is Highest in Hamilton County and Suburban Counties

In Marion and Madison Counties, a plurality are only “somewhat satisfied”



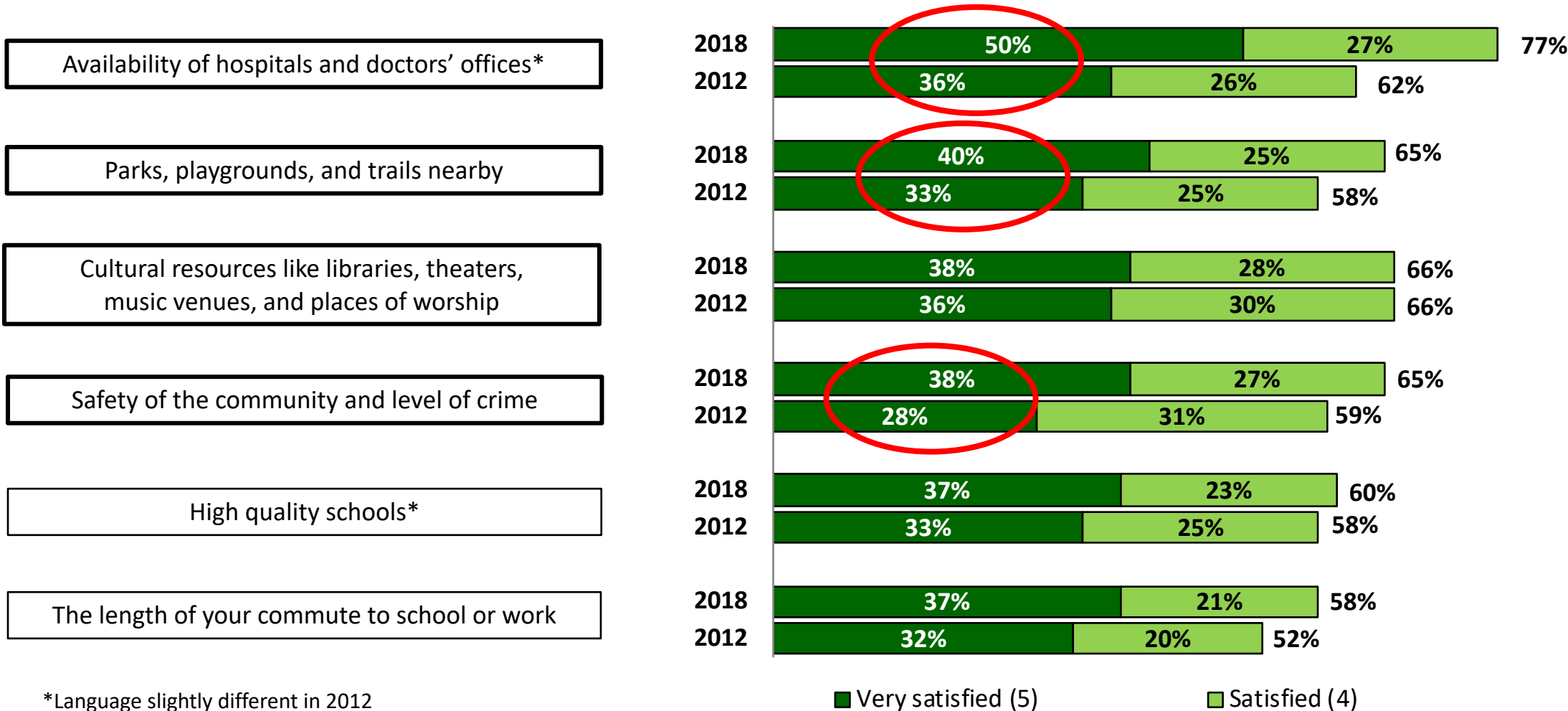
Intensity of Quality of Life Satisfaction Correlated with Education and Income



Residents Most Satisfied with Nearby Doctors, Parks, and Cultural Resources

Satisfaction with doctors nearby, safety of community has increased significantly since 2012

Satisfaction with community on a scale of 1 to 5



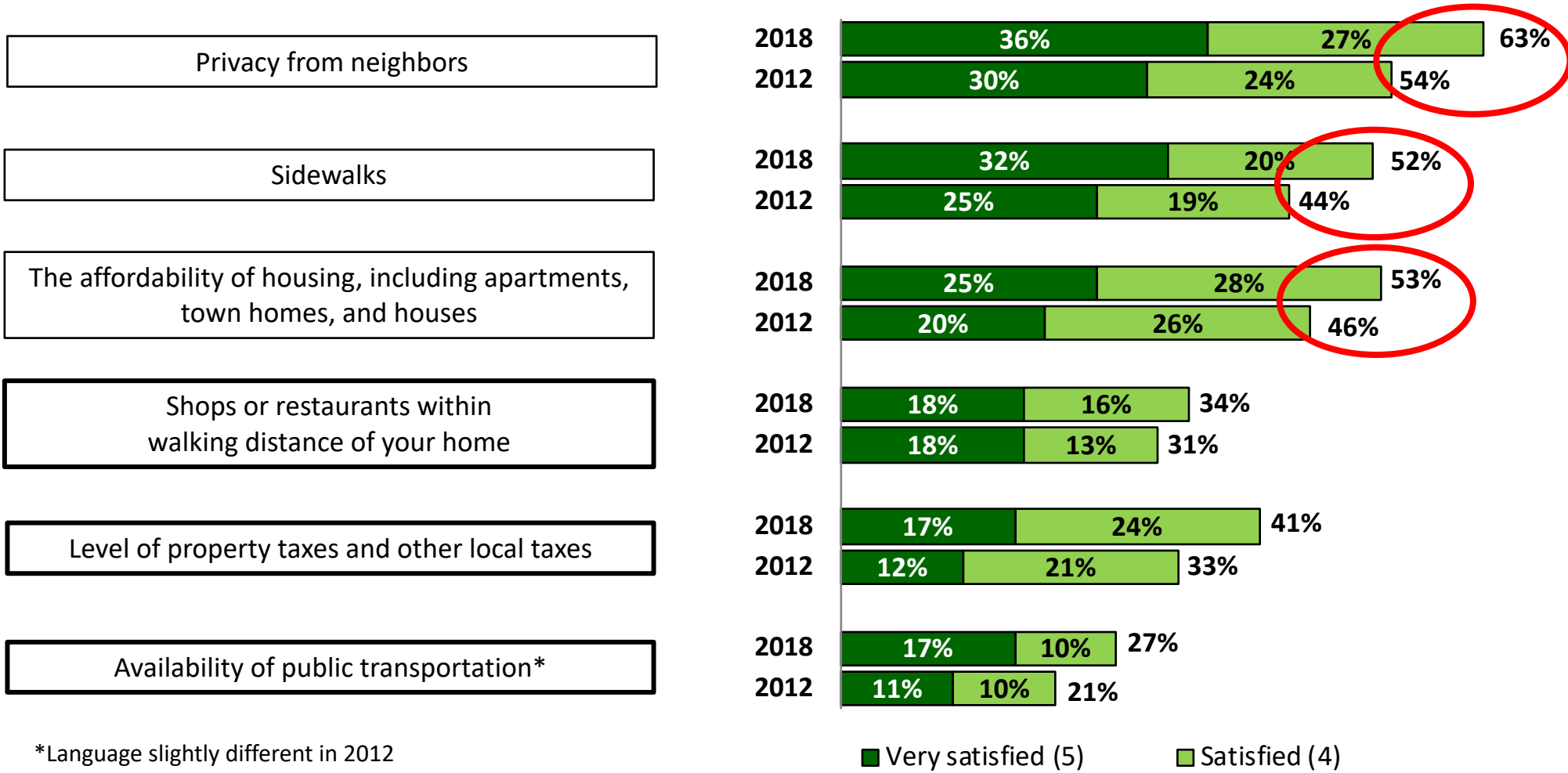
*Language slightly different in 2012

Now I have a few questions about your neighborhood and community. I'd like to read you a list of amenities, features, and activities some people have said are important in deciding where to live. For each, please rate your satisfaction with that feature or amenity in your community on a scale of 1 to 5, with 1 being very dissatisfied, 3 being neutral, and 5 being very satisfied. Remember you can use any number from 1 to 5.

Overall, Residents Less Satisfied with Public Transportation, Tax Levels, and Walkability

But satisfaction with privacy, sidewalks, and affordability have increased somewhat since 2012

Satisfaction with community on a scale of 1 to 5

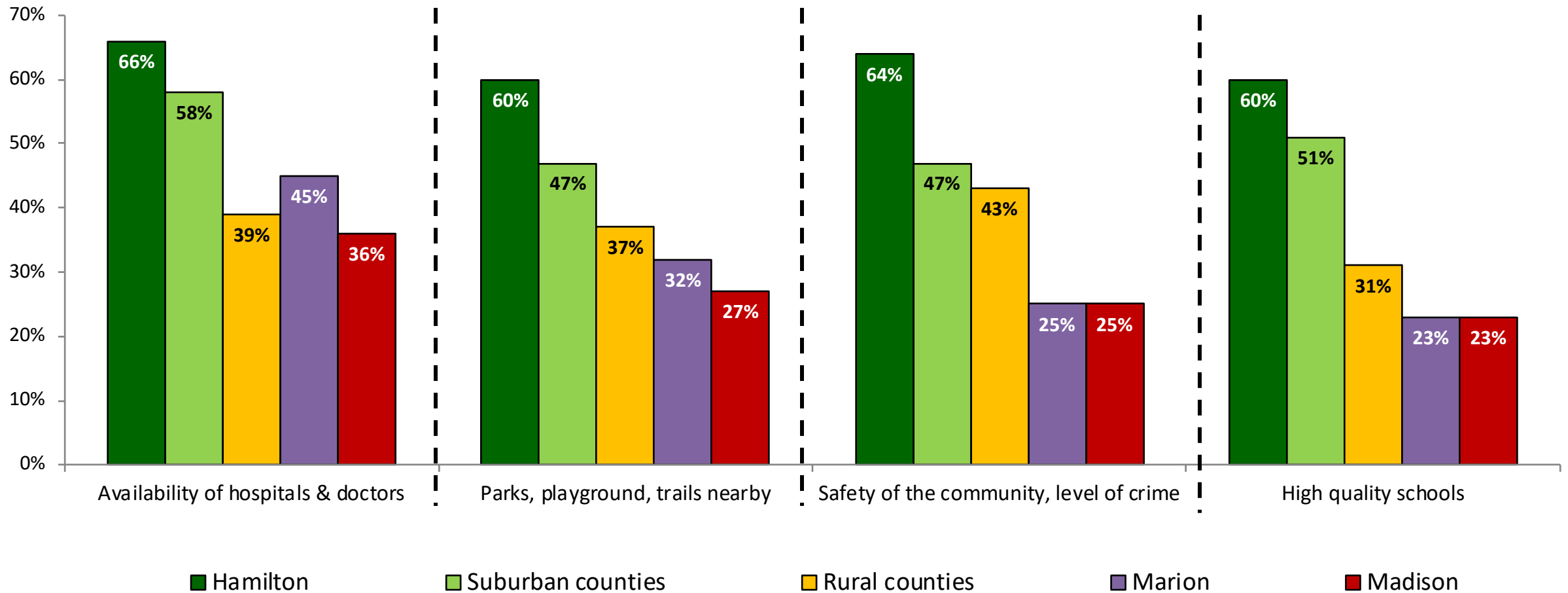


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Satisfaction Very High in Hamilton and Suburban Counties with Nearby Amenities, Safety, and Schools; Much Lower in Marion and Madison Counties

Very Satisfied (% rating a 5) with Community Qualities by Region

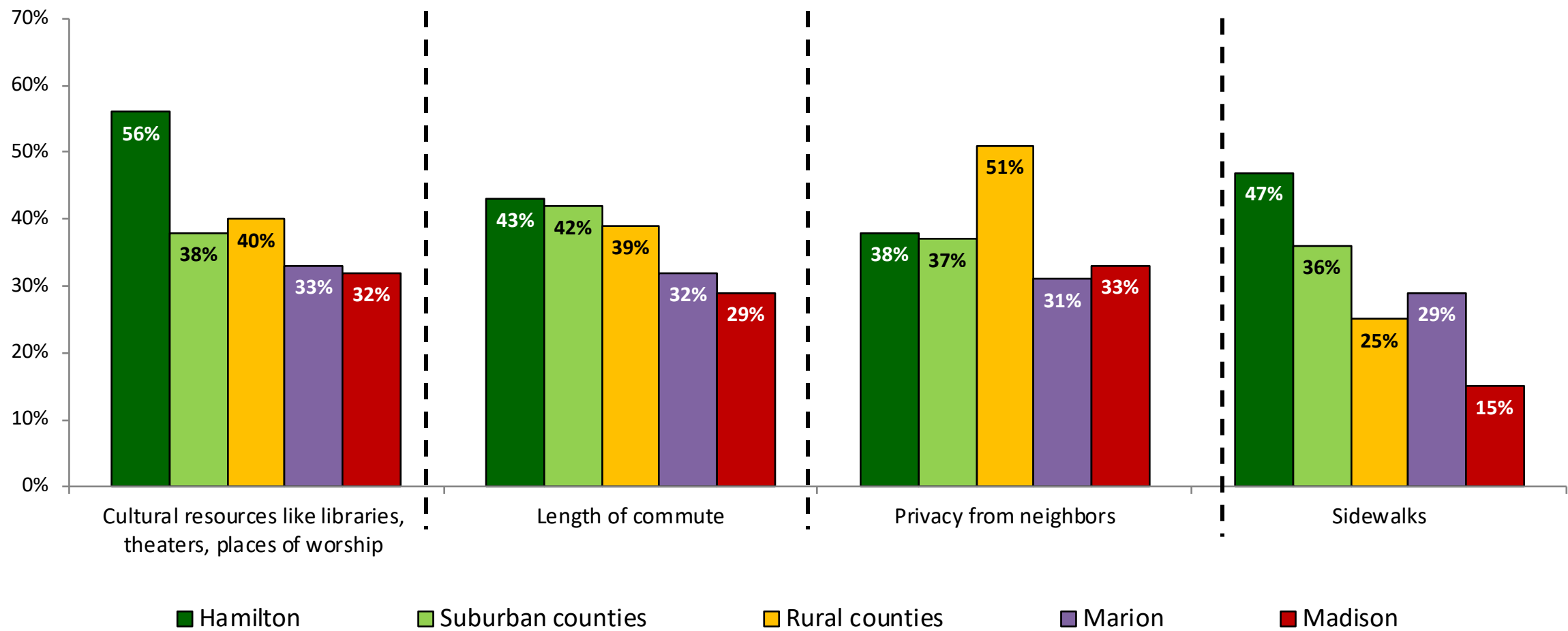


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Lower Satisfaction with Cultural Resources, Commute Length, Privacy, and Sidewalks

Rural residents happier with privacy, Hamilton residents more satisfied with cultural resources and sidewalks

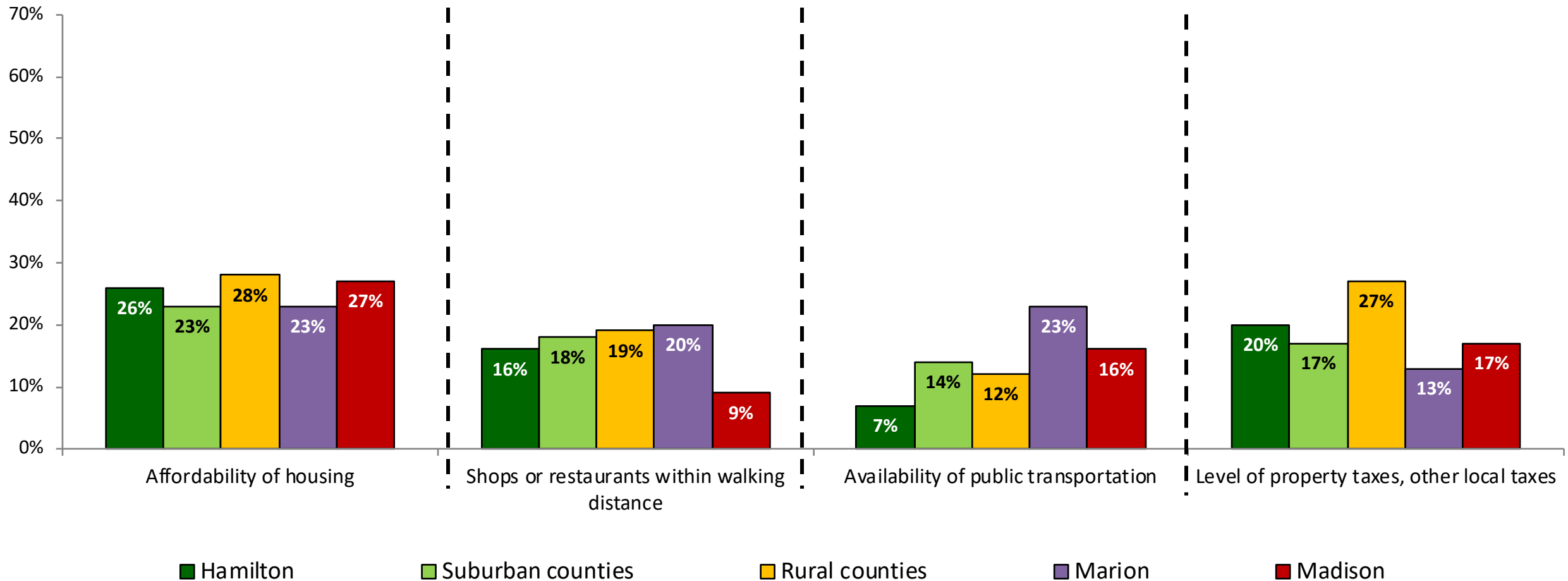
Very Satisfied (% rating a 5) with Community Qualities by Region



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Satisfaction Much Lower Across the Region with Housing Affordability, Walkability, Public Transport, and Local Taxes

Very Satisfied (% rating a 5) with Community Qualities by Region



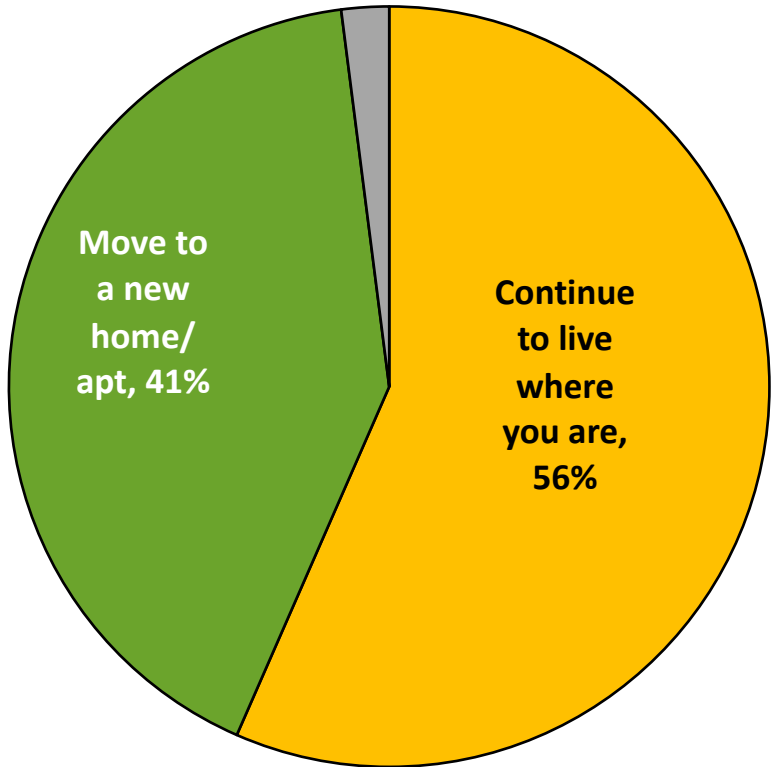
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On the Move

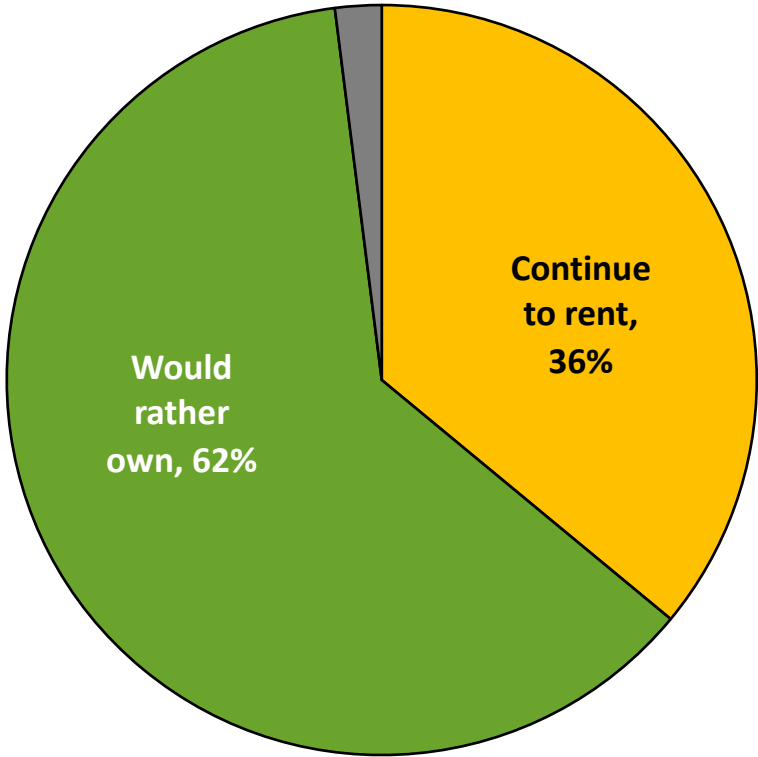
Four-in-Ten Want to Move in the Next Few Years; Half are Current Home Owners

Over 60 percent of renters would prefer to own

Move to a New Home
or Stay Where You Are?
(all respondents, 100%)

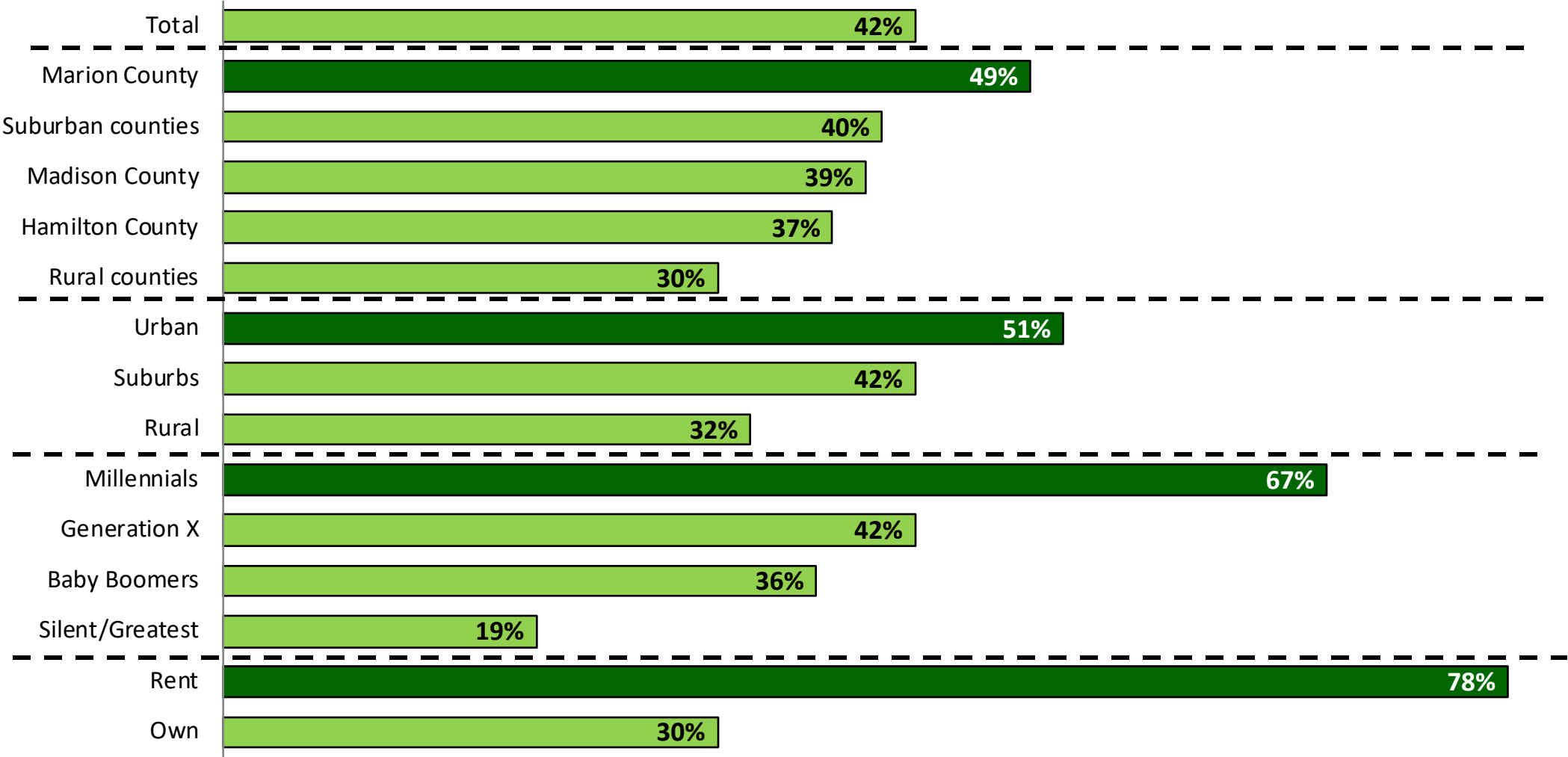


Currently Rent:
Rather Own or Stay Renting?
(N=431, 25%)

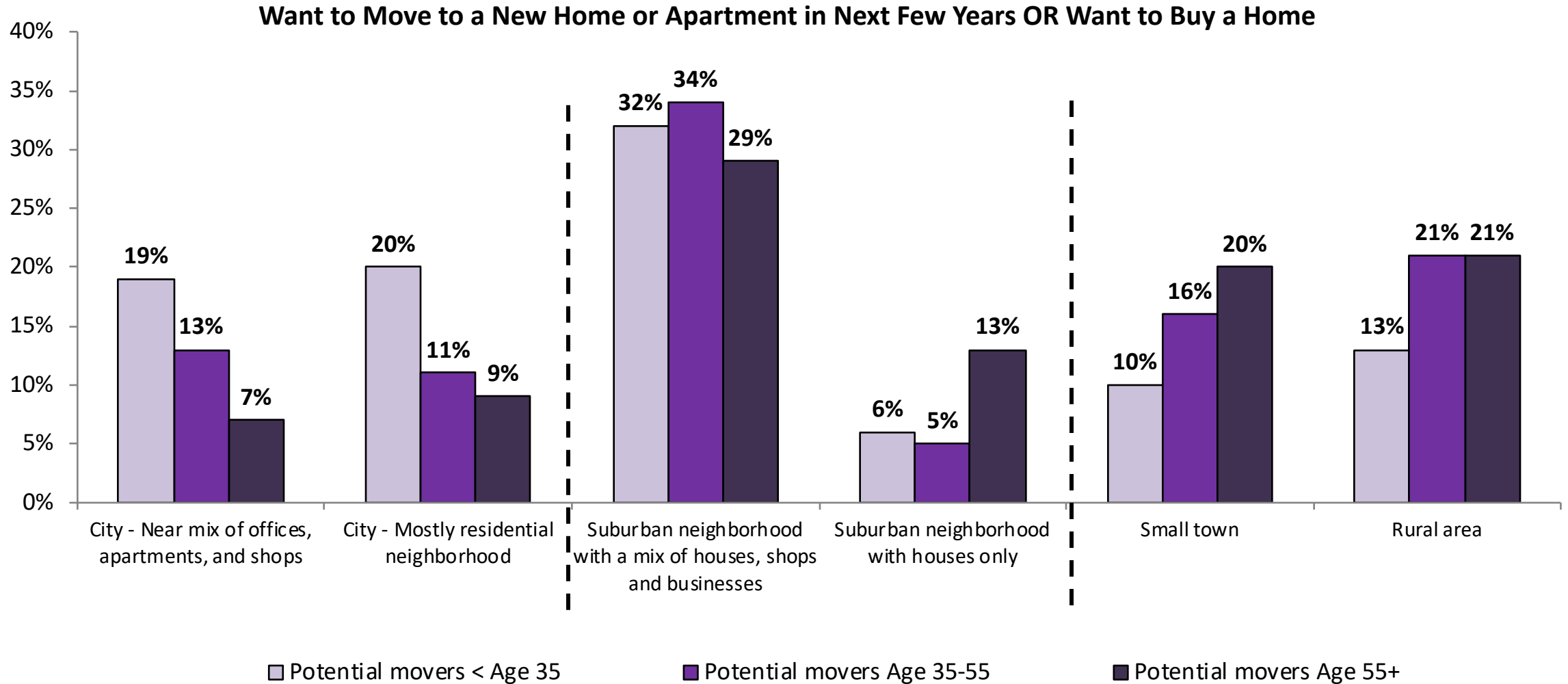


Renters, Millennials, and Urban Residents More Likely to Want to Move

Want to Move to a New Home or Apartment in Next Few Years OR are Renters Who Want to Own

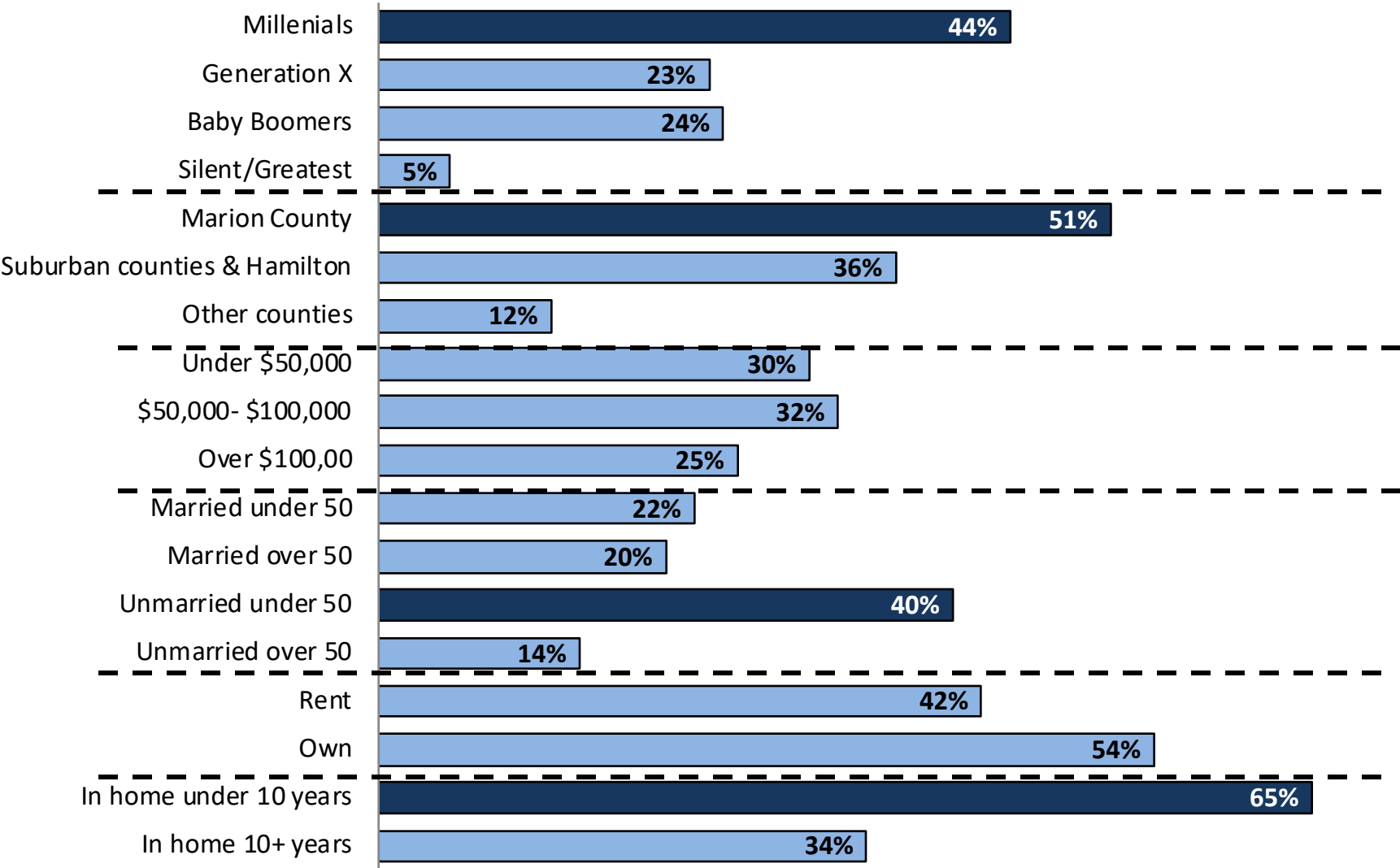


Young Movers Want to Live in the City or Mixed-Use Suburbs, while Older Movers Want to Live Outside the City



Those Who Want to Move More Likely to Young, Unmarried, and Newer to Their Homes

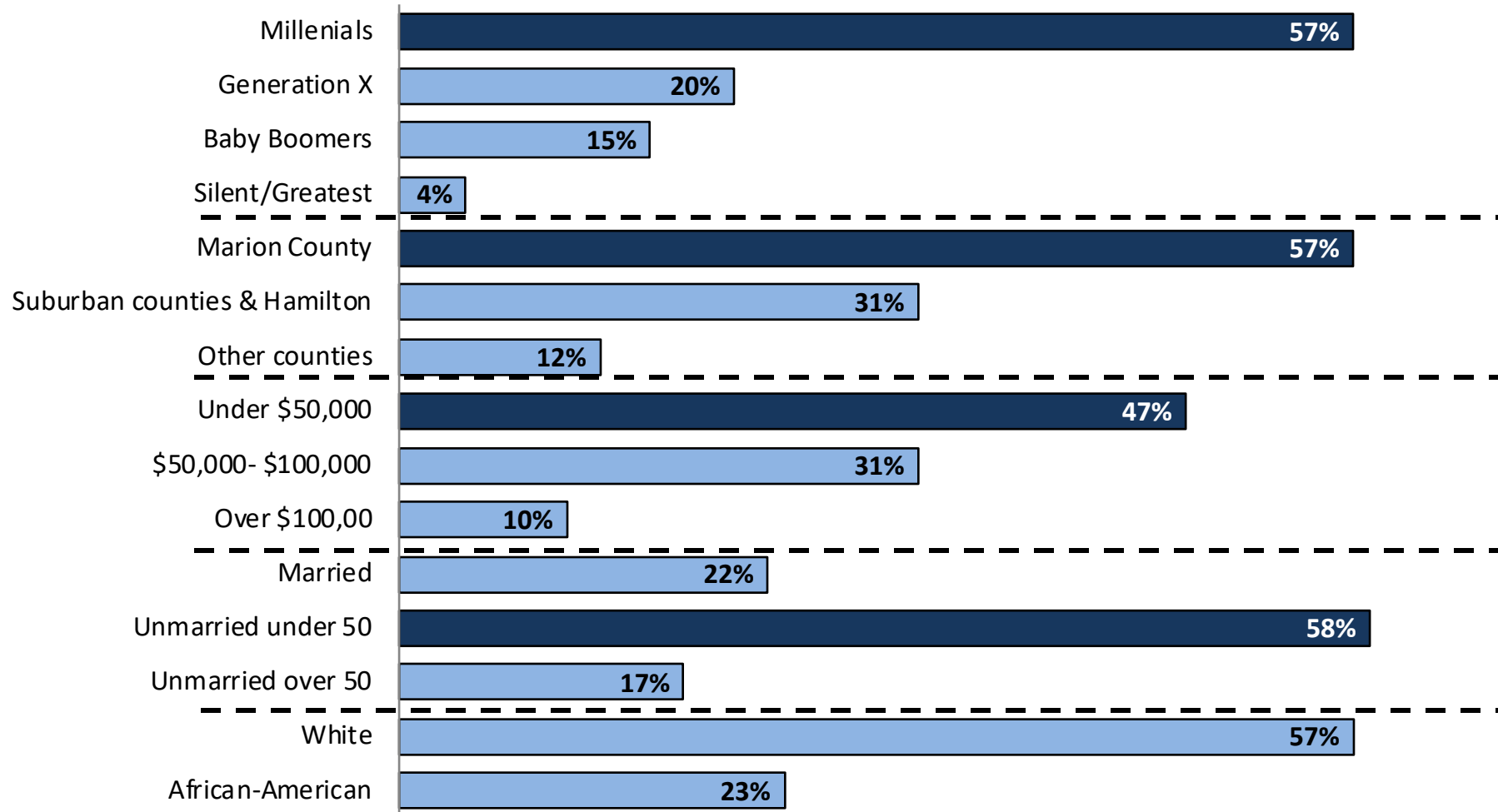
Want to Move to a New Home or Apartment in Next Few Years (N=713, 41%)



Renters who Want to Buy a Home More Likely to Be Young, Urban, and Unmarried

Greater percentage of African Americans than among the population as a whole

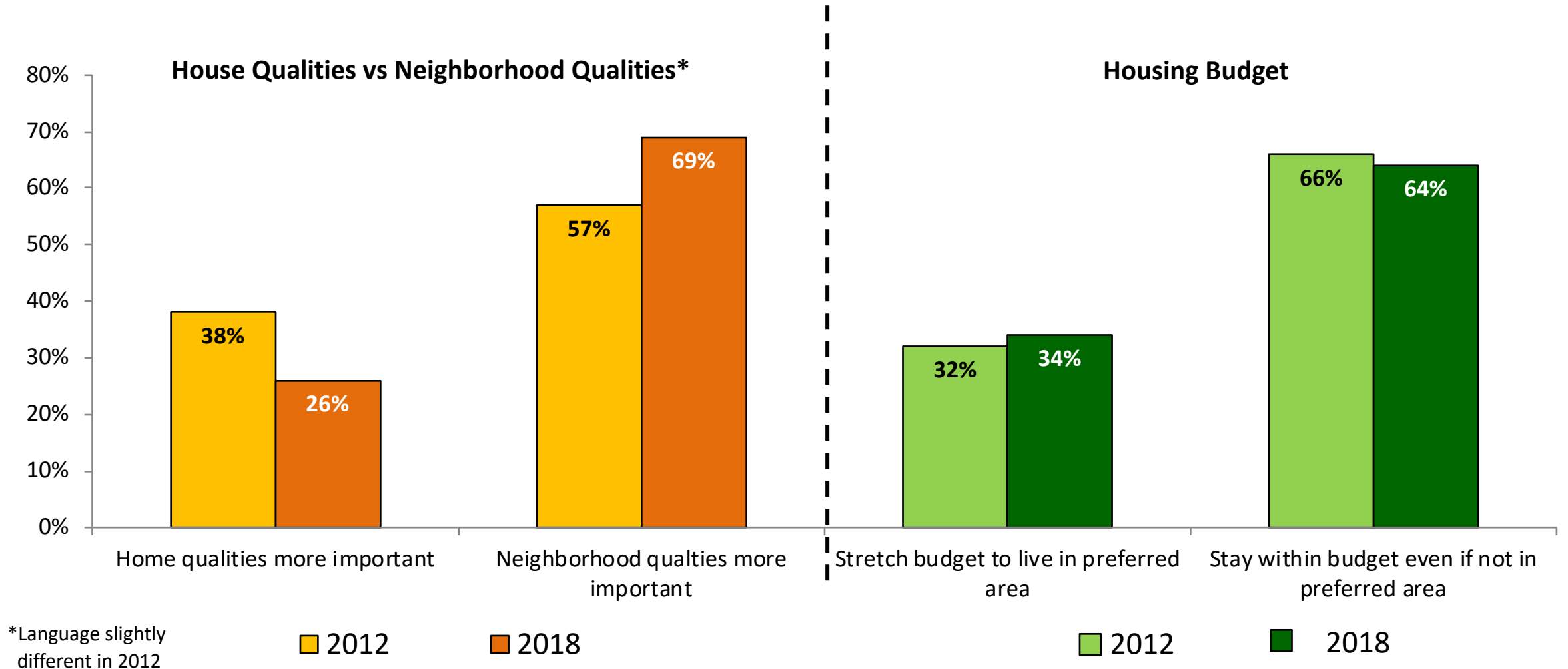
Renters Who Want to Buy a Home (N=431, 25%)



What's Important in Deciding Where to Live

Two-Thirds Put Neighborhood Qualities Before House Qualities

But similar percentage would stay in budget rather than live in preferred neighborhood



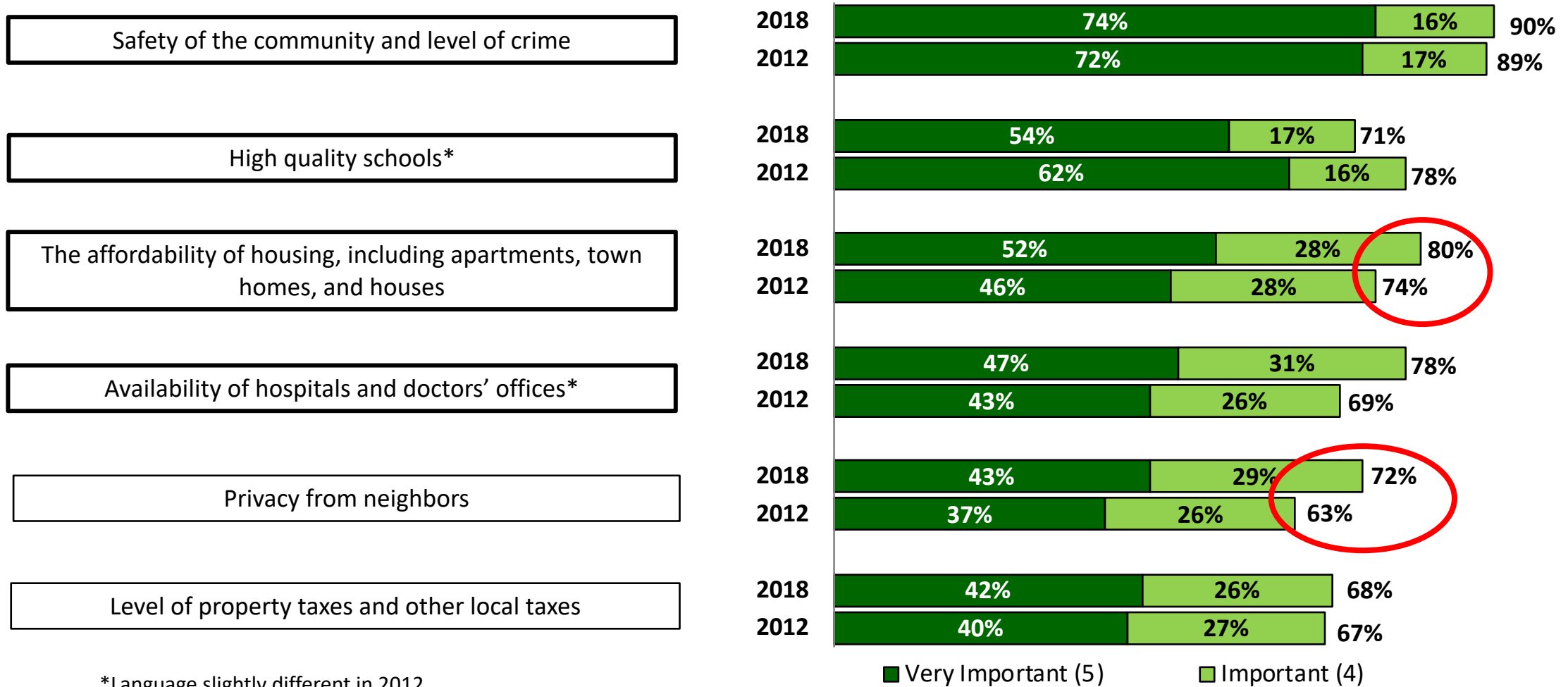
If you were to purchase or rent a home in Central Indiana today, which would be more important to you in deciding where to live: the qualities of the home itself, like size and features, OR the neighborhood the home is in?

I would be willing to stretch my budget to spend more on housing so I could live in my preferred neighborhood. OR It is important for me to stay within my budget even if it means I would be unable to live in my preferred neighborhood.

Safety, Schools, and Affordability Most Important in Deciding Where to Live

Drop in importance of quality schools may be related to an older population in 2018

Importance of community features on a scale of 1 to 5



*Language slightly different in 2012

Now think for a moment about where you would like to live. It may be your current home, or it may be somewhere new. I am going to read you that same list again. If you were deciding today where you wanted to live, please tell me how important each of the following would be to you on a scale of 1 to 5, with 1 being not important at all and 5 being very important.

Public Transportation, Walkability, and Length of Commute Are Less Important

Sidewalks and walkability have increased in importance since 2012

Importance of community features on a scale of 1 to 5

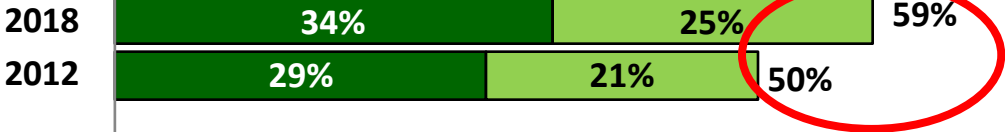
Cultural resources like libraries, theaters, music venues, and places of worship



Parks, playgrounds, and trails nearby



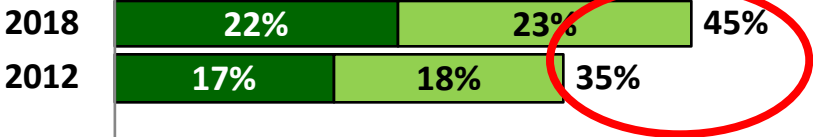
Sidewalks



The length of your commute to school or work



Shops or restaurants within walking distance of your home



Availability of public transportation*



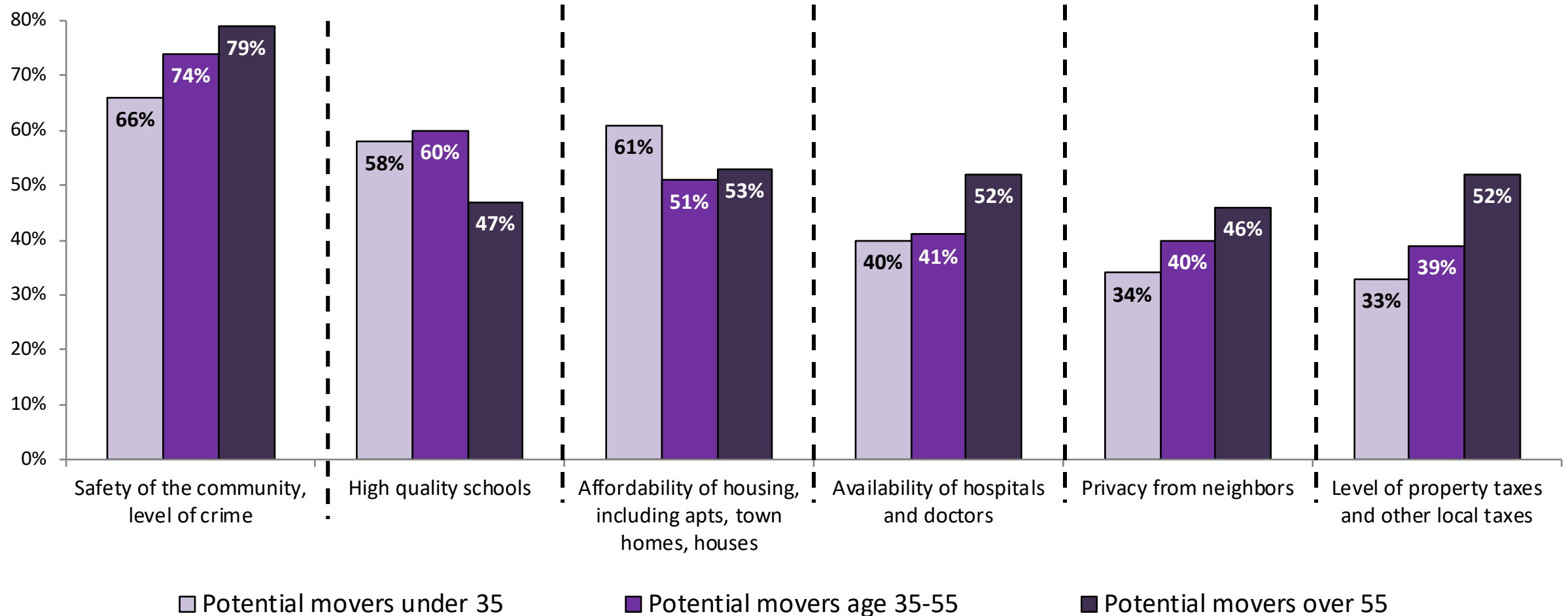
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■ Very important (5) ■ Important (4)

Among Likely Movers, Safety, Schools, and Affordability are Most Important

Older movers see doctors, privacy, and local taxes as more important than younger movers

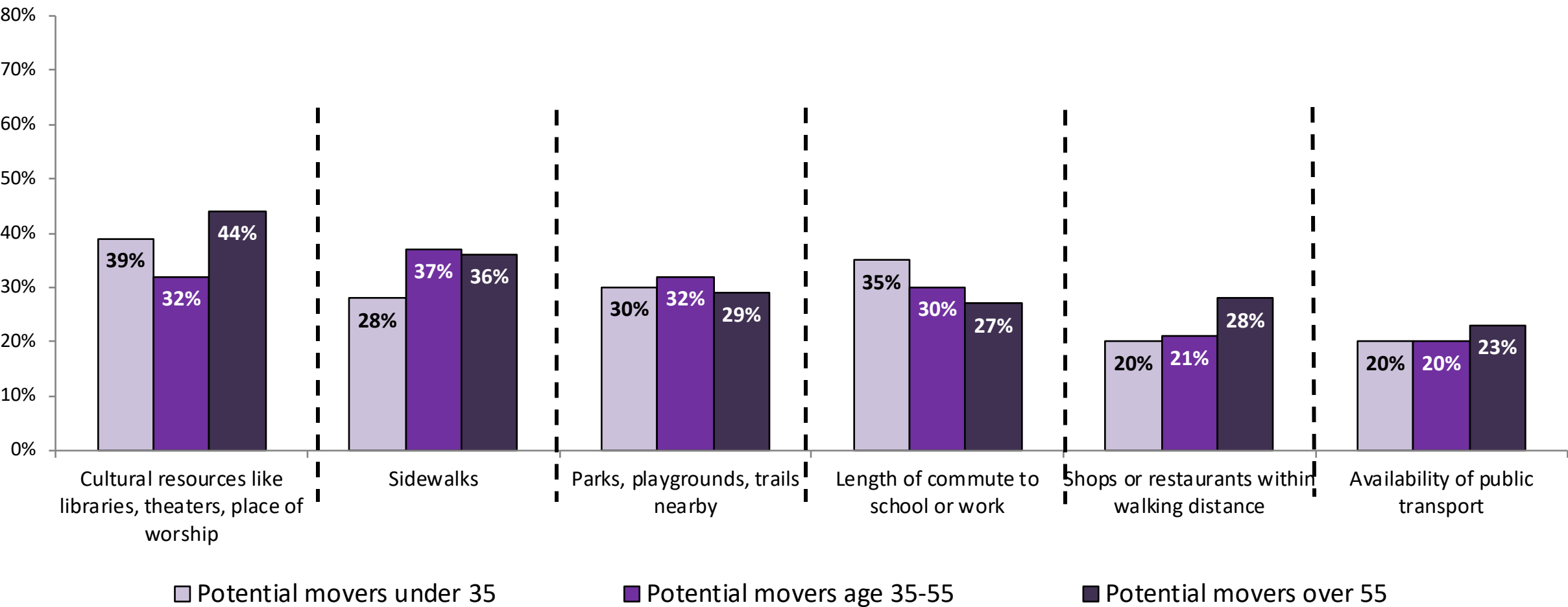
Very Important (% rating a 5) Community Qualities by Potential Movers/Age



Now think for a moment about where you would like to live. It may be your current home, or it may be somewhere new. I am going to read you that same list again. If you were deciding today where you wanted to live, please tell me how important each of the following would be to you on a scale of 1 to 5, with 1 being not important at all and 5 being very important.

Among Less Important Features, Cultural Resources and Sidewalks More Important to Older Movers while Commute Length More Significant to Younger Movers

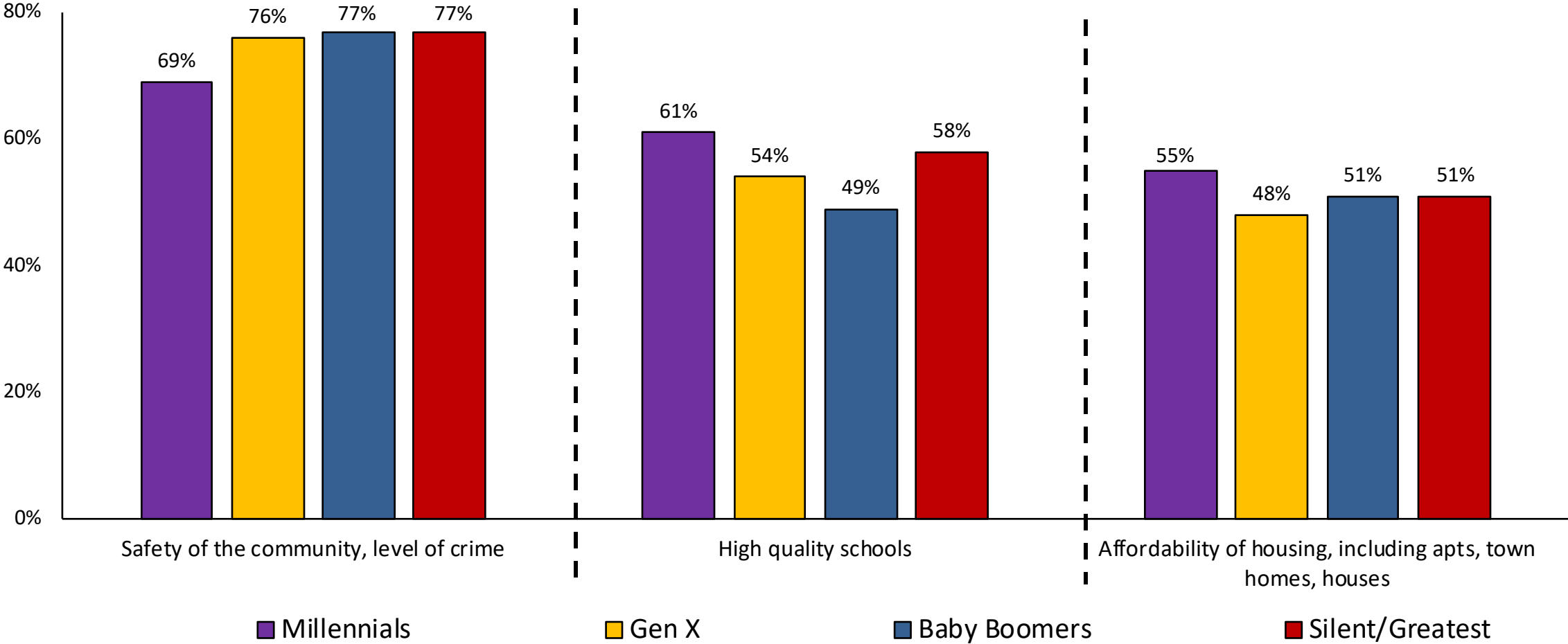
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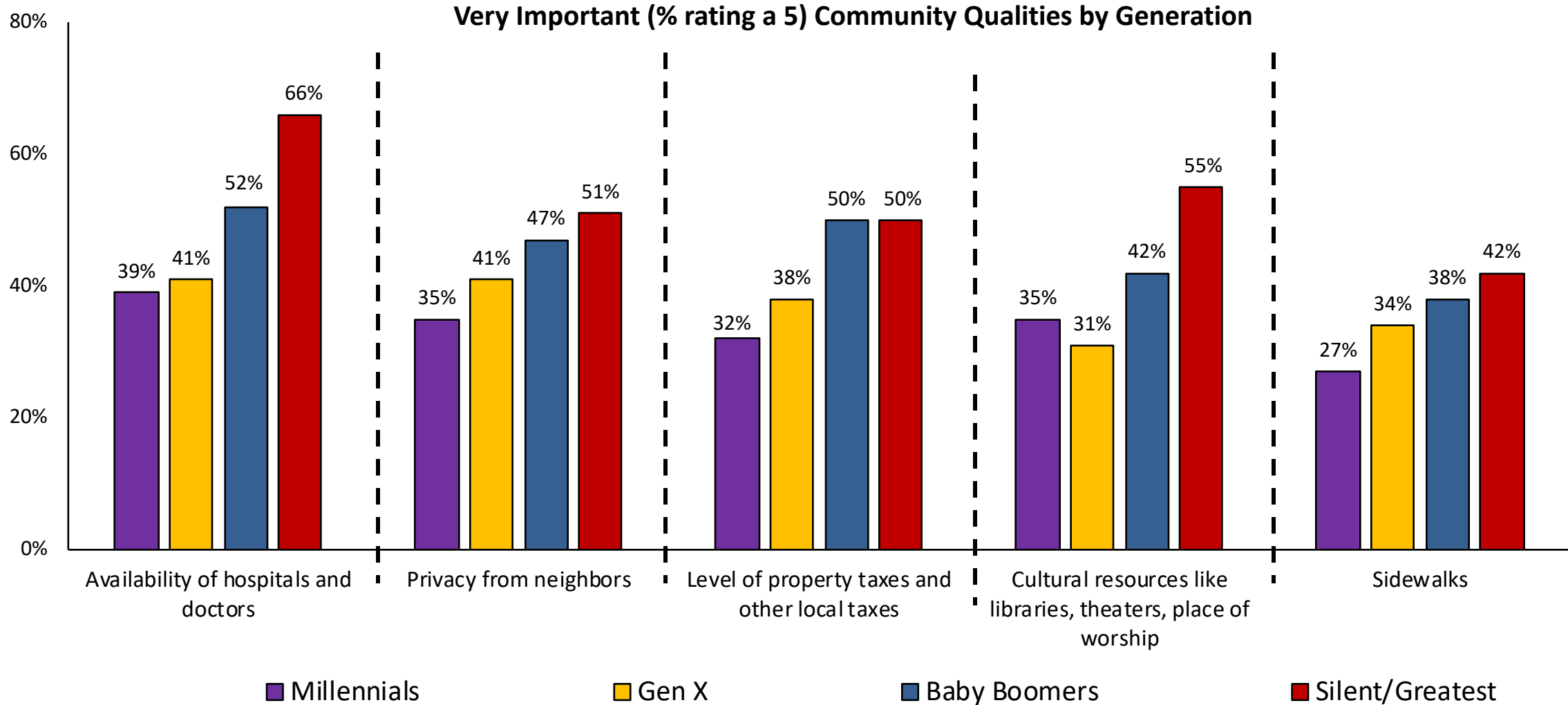
Safety of Community, High Quality Schools, and Affordability Very Important Across Generations

Very Important (% rating a 5) Community Qualities by Generation



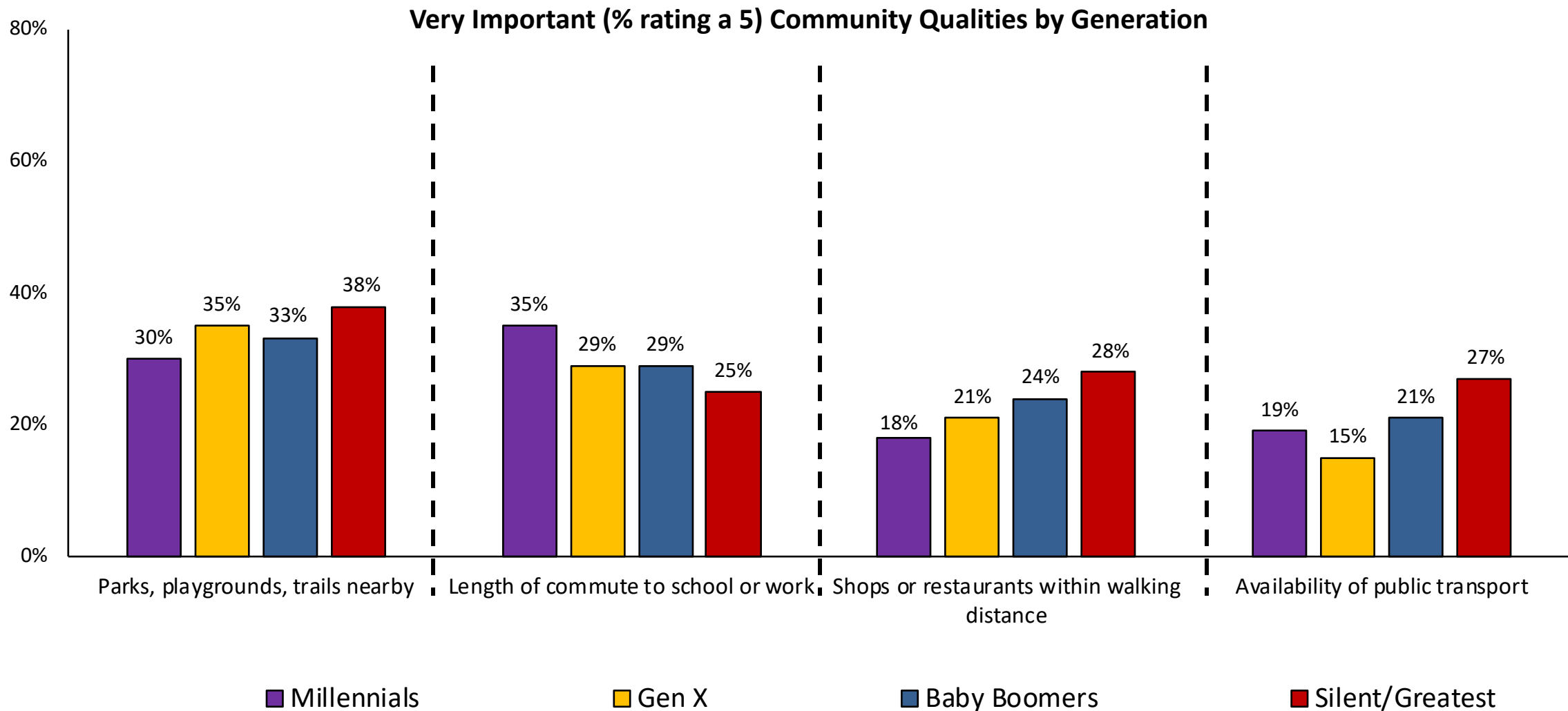
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Doctors, Privacy, Property Taxes, Cultural Resources, and Sidewalks Increase in Importance as Residents Age



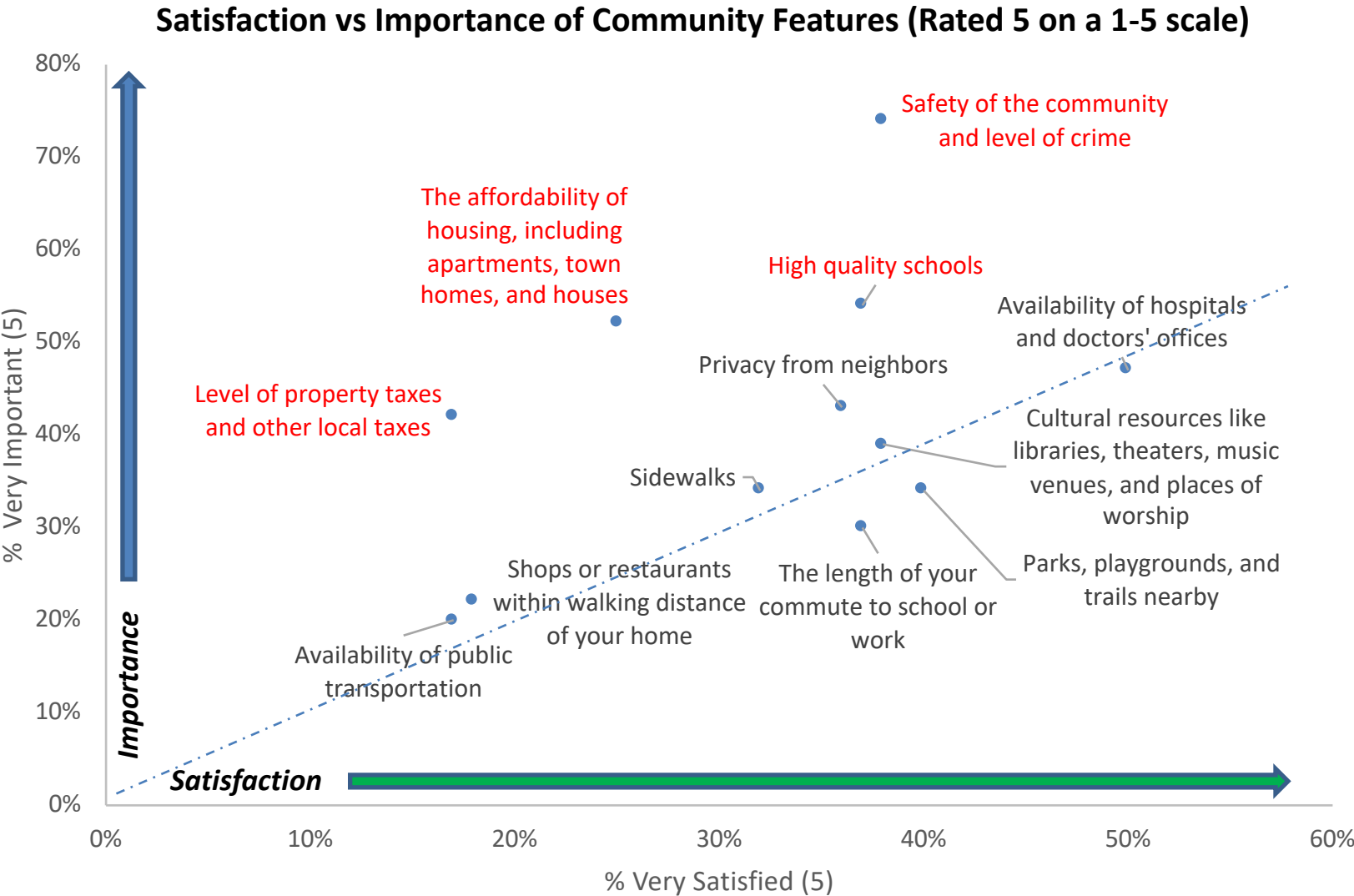
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Among Overall Less Important Features, Younger Generations Care More About Commute Length, While Older Generations Care More about Walkability



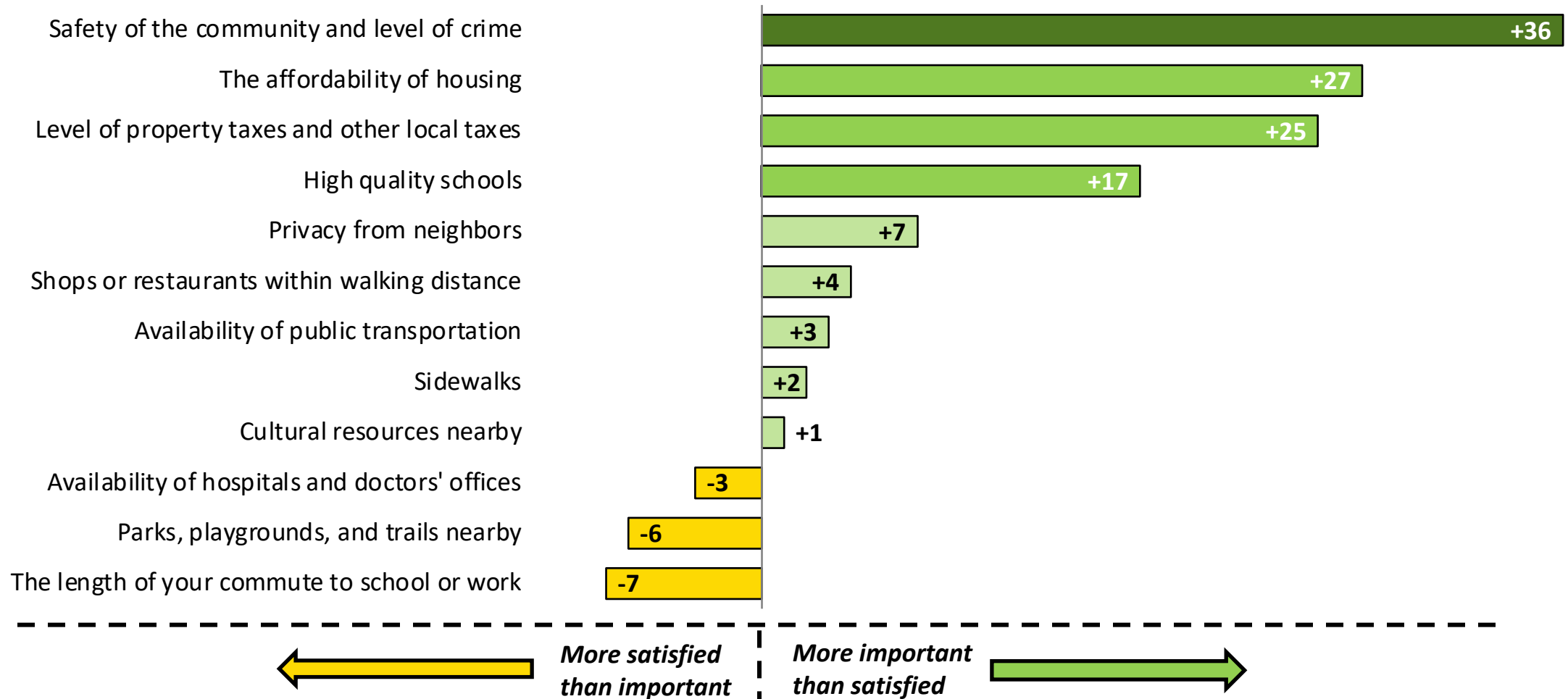
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Biggest Mismatches between Satisfaction and Importance Center around Level of Crime, Housing Affordability and Property Taxes



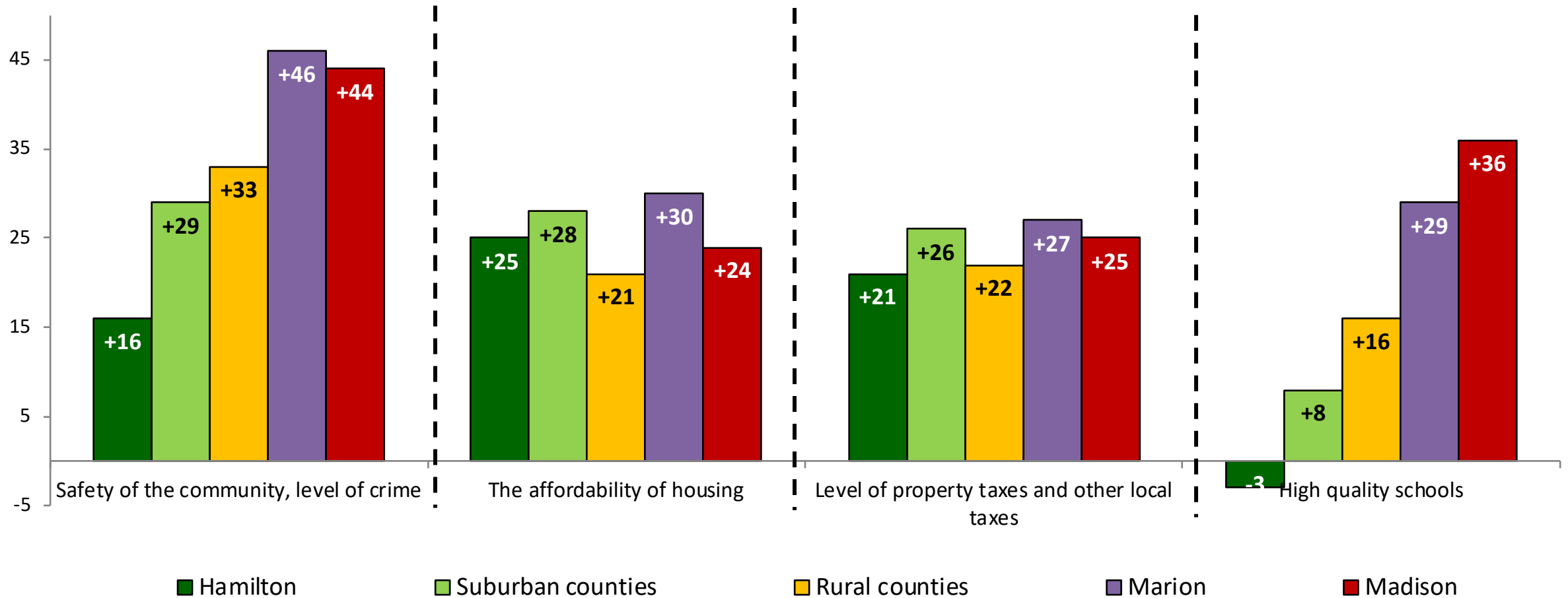
Biggest Mismatches between Importance and Satisfaction Center around Community Safety, Housing Affordability, Property Taxes, and Schools

Importance Gap: Very Important Minus Very Satisfied with Community Features (Percentage Point Difference)



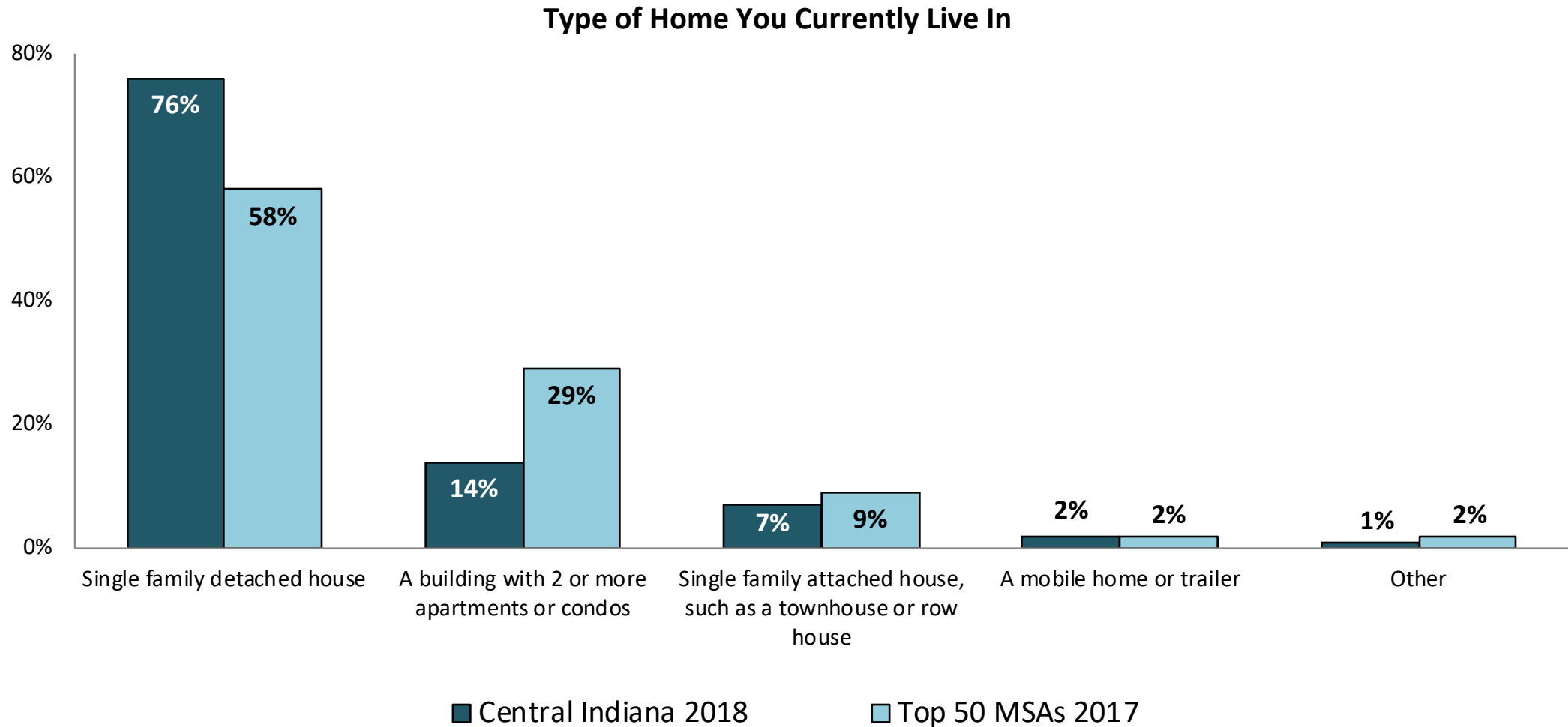
Marion and Madison County Residents Have Bigger Gaps Between Importance and Satisfaction when It Comes to Safety of Community, High Quality Schools

Importance Gap: Very Important Minus Very Satisfied with Community Features by Region



Mixed-Use Community v. Conventional Suburban Community

Three-quarters of Those in Central Indiana Live in a Detached Single Family Home; Higher Percentage than in Top 50 MSAs



Just Under Half of Central Indianans Would Prefer to Live in a Walkable, Somewhat Denser Community

Similar, but slightly less interest than among top 50 MSAs

Preferred Community:

Central Indiana 2018

46%

52%

Houses with small yards and it is easy to walk to the places you need to go.

Houses with large yards and you have to drive to the places where you need to go.

Top 50 MSAs 2017

53%

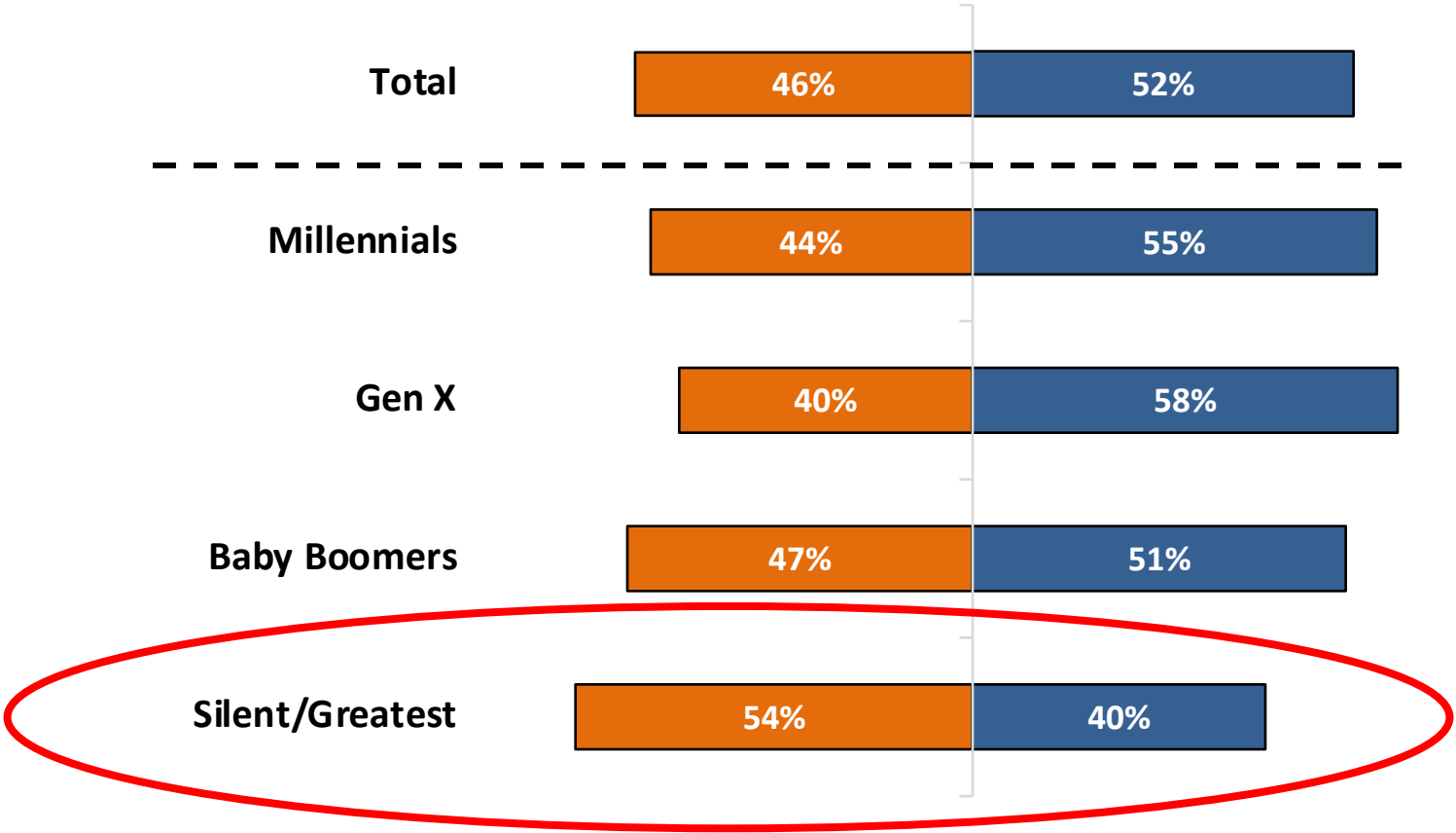
47%

Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. I am going to read two community descriptions. Please tell me which ONE community you prefer, even if neither community is perfect.

Older Generations More Likely to Prefer Small Yard and Walkable Community

Younger generations lean towards conventional suburbs, but still 4-in-10 prefer a walkable option

Preferred Community by Generation



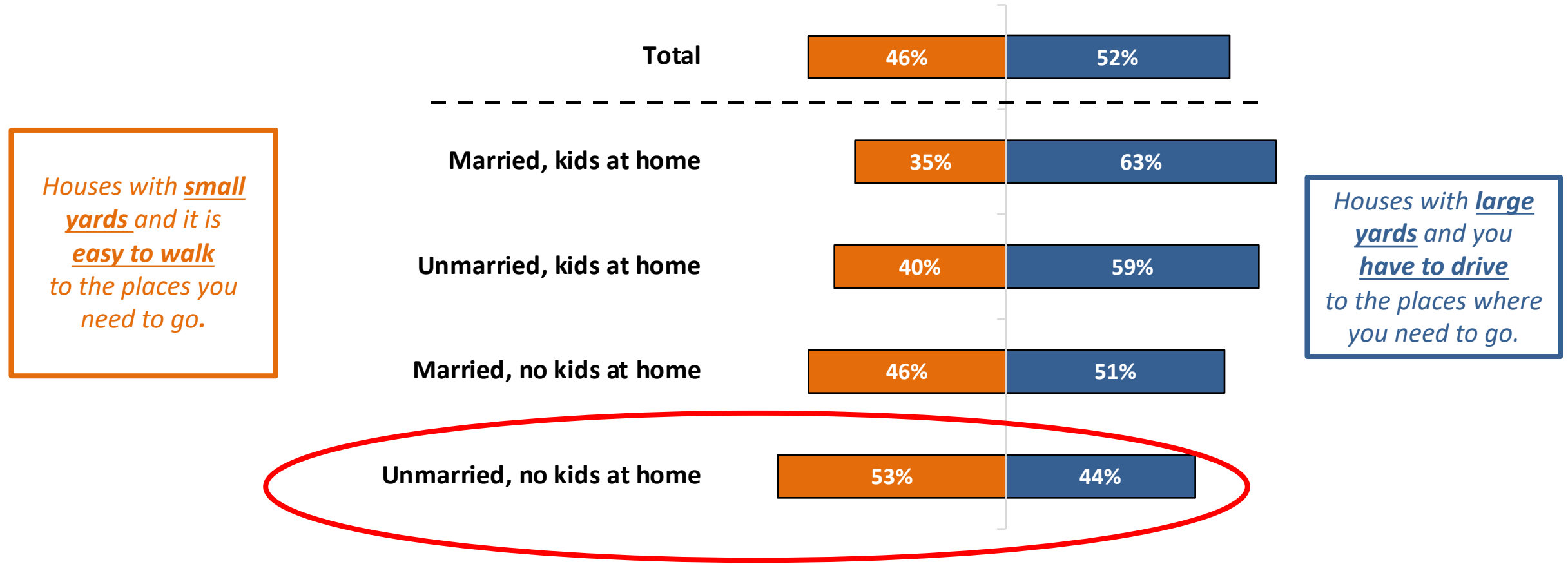
Houses with small yards and it is easy to walk to the places you need to go.

Houses with large yards and you have to drive to the places where you need to go.

Having Kids at Home Drives Preference for Conventional Suburbs

Those without kids at home, especially if unmarried, prefer a walkable community

Preferred Community by Marital and Household status



Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. I am going to read two community descriptions. Please tell me which ONE community you prefer, even if neither community is perfect.

Age, Marital Status, and Lack of Kids at Home Drive Preference for Walkable Community

Urbanicity and education also play a role

Community B (Small yard, Walk to places):

*Houses with small yards and it is easy to walk
to the places you need to go.*

Total Prefer: 46%

Want to continue to rent (62%)

Women over age 64 (59%)

Widowed (59%)

Earning under \$15,000 (59%)

Live in a city (55%)

Unmarried, over age 50 (55%)

Non-college, over age 64 (55%)

Unmarried, no kids at home (53%)

Marion North/Central County (53%)

Hamilton County (51%)

Post graduate degree (51%)

Community A (Large yard, Drive to places):

*Houses with large yards and you have to
drive to get to the places you need to go.*

Total Prefer: 52%

Live in a rural area (65%)

Non-college, age 35-49 (64%)

Horseshoe suburbs (62%)

Kids at home (62%)

Women age 35-49 (60%)

Gen X men (60%)

South Marion County (60%)

Married, under age 50 (59%)

Northern suburbs, excluding Hamilton (58%)

Men age 18-34 (58%)

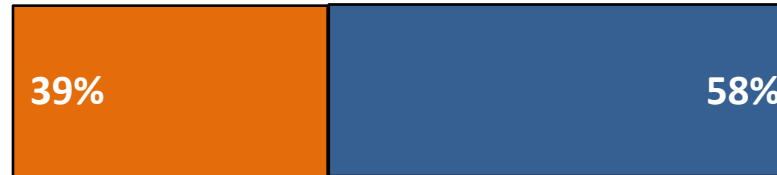
Men, high school or less (57%)

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Central Indianans Less Willing to Give up Detached Home For Walkable Community and Short Commute, Compared to Top 50 MSAs

Preferred Community:

Central Indiana 2018



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

Top 50 MSAs 2017



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

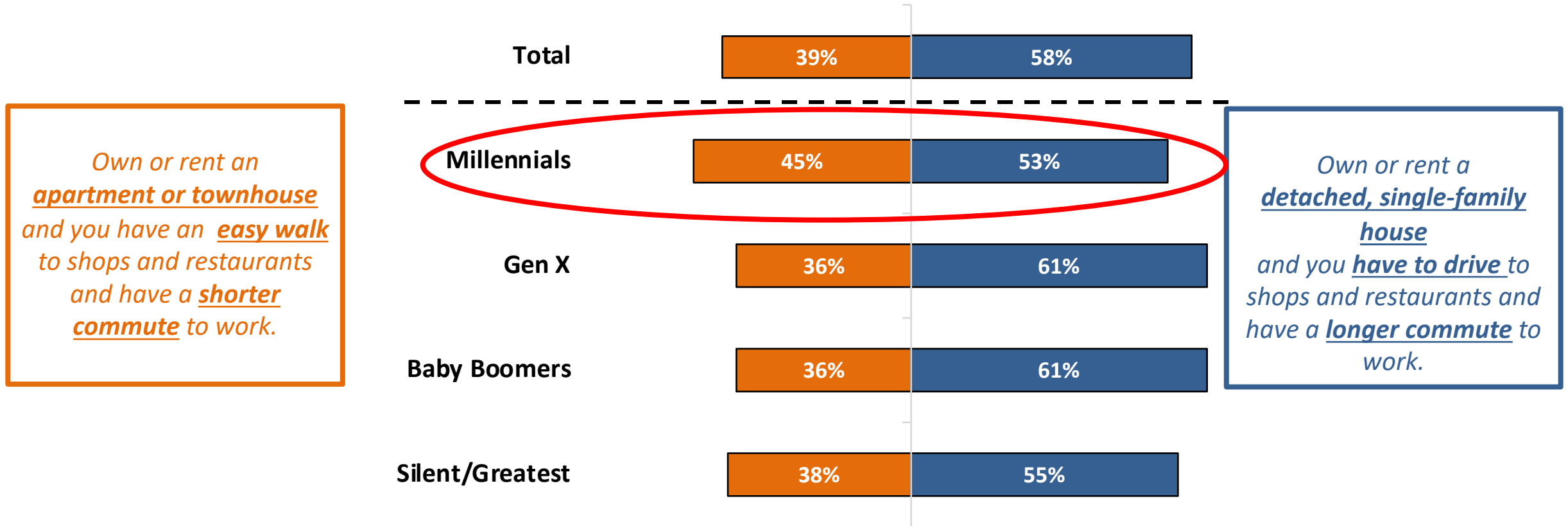
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Millennials More Interested in Walkable Community and Short Commute

Even If It Means Living in an Apartment or Townhouse

Older generations less keen on walkable community if it means giving up detached house

Preferred Community by Generation

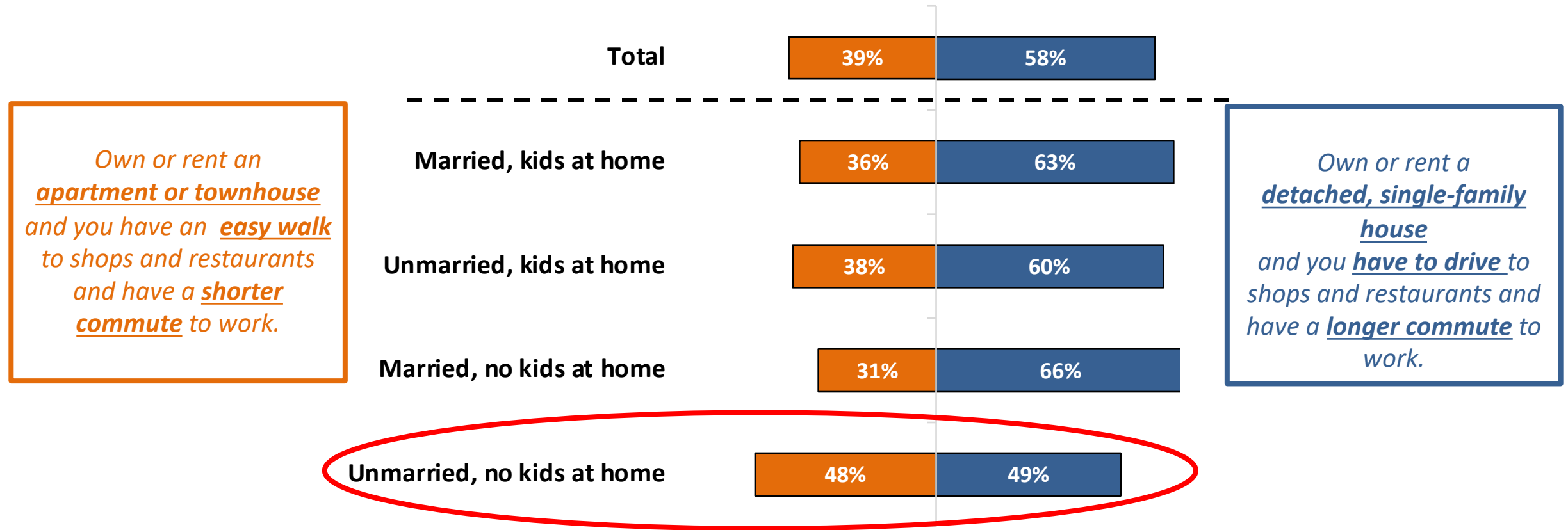


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Six-in-Ten Who are Married or Have Kids at Home Prefer Detached Home over Walkable Community and Short Commute

But half of unmarried residents without kids at home prefer the walkable community

Preferred Community by Marital and Household Status



Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. I am going to read two community descriptions. Please tell me which ONE community you prefer, even if neither community is perfect.

Age, Marital Status, Urbanicity Drive Preference for Walkable Community and Short Commute Even if It Means Living in Townhouse or Apartment

Rural and small town, married, and middle-aged residents prefer the detached home

Community A (Apartment, Walk to places):

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

Total prefer: 39%

Want to continue to rent (59%)

Women, age 18-34 (53%)

College grad, age 18-34 (52%)

Single (51%)

Potential movers, under age 35 (49%)

Renters (48%)

Unmarried, no kids at home (48%)

Widowed (47%)

Live in a city (47%)

Under \$50,000 (46%)

Millennials (45%)

Marion County (43%)

African American (43%)

Community B (House, Drive to places):

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

Total prefer: 58%

Madison County (68%)

Horseshoe counties (67%)

Married (65%)

More than \$200,000 (65%)

Live in small town/rural areas (64%)

Men, age 35-49 (64%)

Age 50-64 (63%)

\$50,000 to \$100,000 (63%)

More than 20 years in their home (63%)

Kids at home (62%)













Non-college men (62%)

Post-graduate degree men (62%)

Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. I am going to read two community descriptions. Please tell me which ONE community you prefer, even if neither community is perfect.

One-in-Four Living in a Detached Home Currently Would Prefer to Live in an Attached Home in a Walkable Community with Shorter Commute

Housing/Community Match

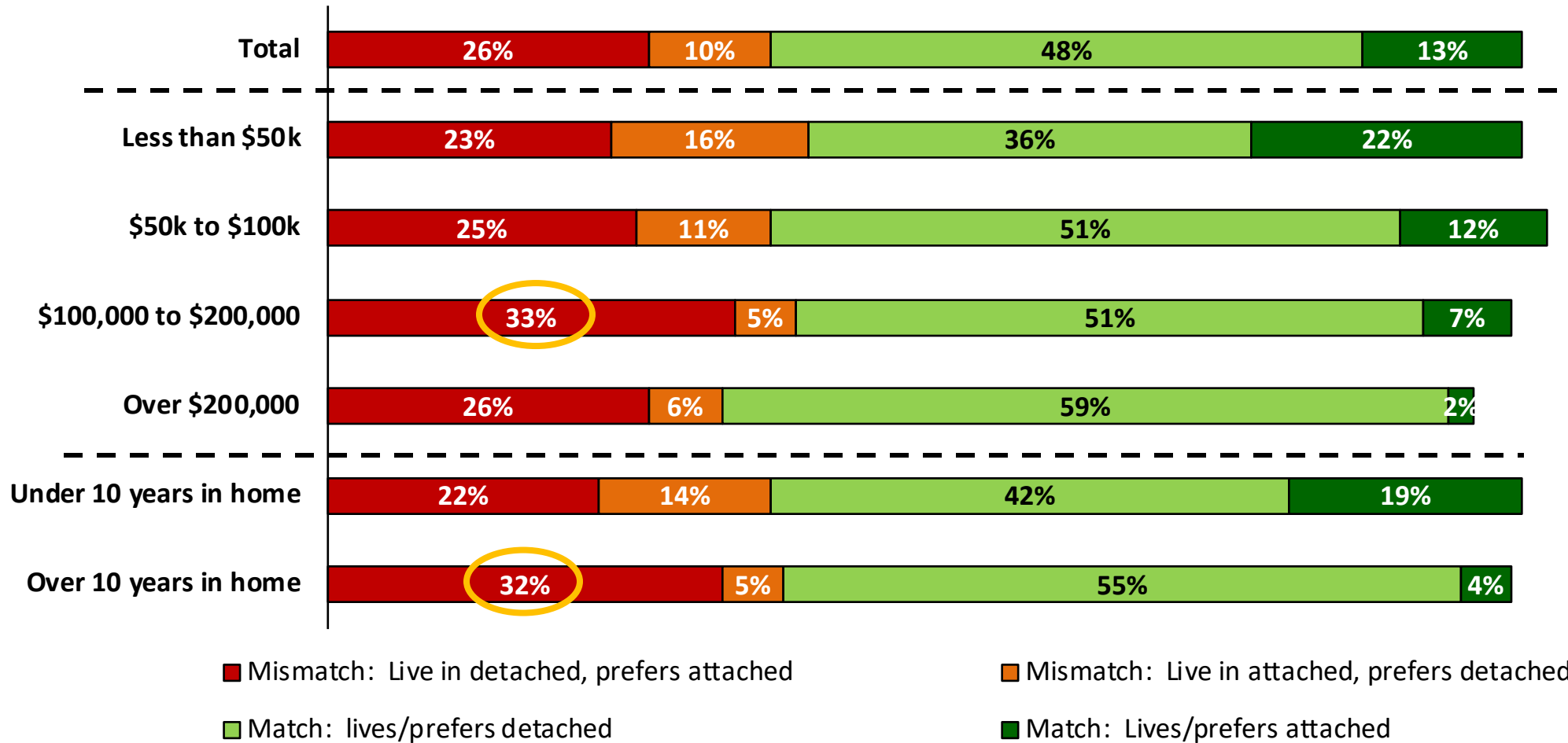
	Lives in	Prefers	Central Indiana 2018	Top 50 MSA 2017
Mismatched	 Detached home	Apartment/townhouse in <u>walkable neighborhood</u>  	26%	21%
	 Attached home	Detached home in <u>conventional neighborhood</u>  	10%	10%
Matched	 Detached home	Detached home in <u>conventional neighborhood</u>  	48%	37%
	 Attached home	Apartment/townhouse in <u>walkable neighborhood</u>  	13%	28%

Do you live in:

Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. I am going to read two community descriptions. Please tell me which ONE community you prefer, even if neither community is perfect.

Residents Who Live in Detached Homes But Prefer Attached Home (Walkable and Shorter Commute) More Likely to Be Upper Income and Live in Their Homes More than a Decade

House Preference/Current House By Income, Years in Home, Younger Generation/Gender



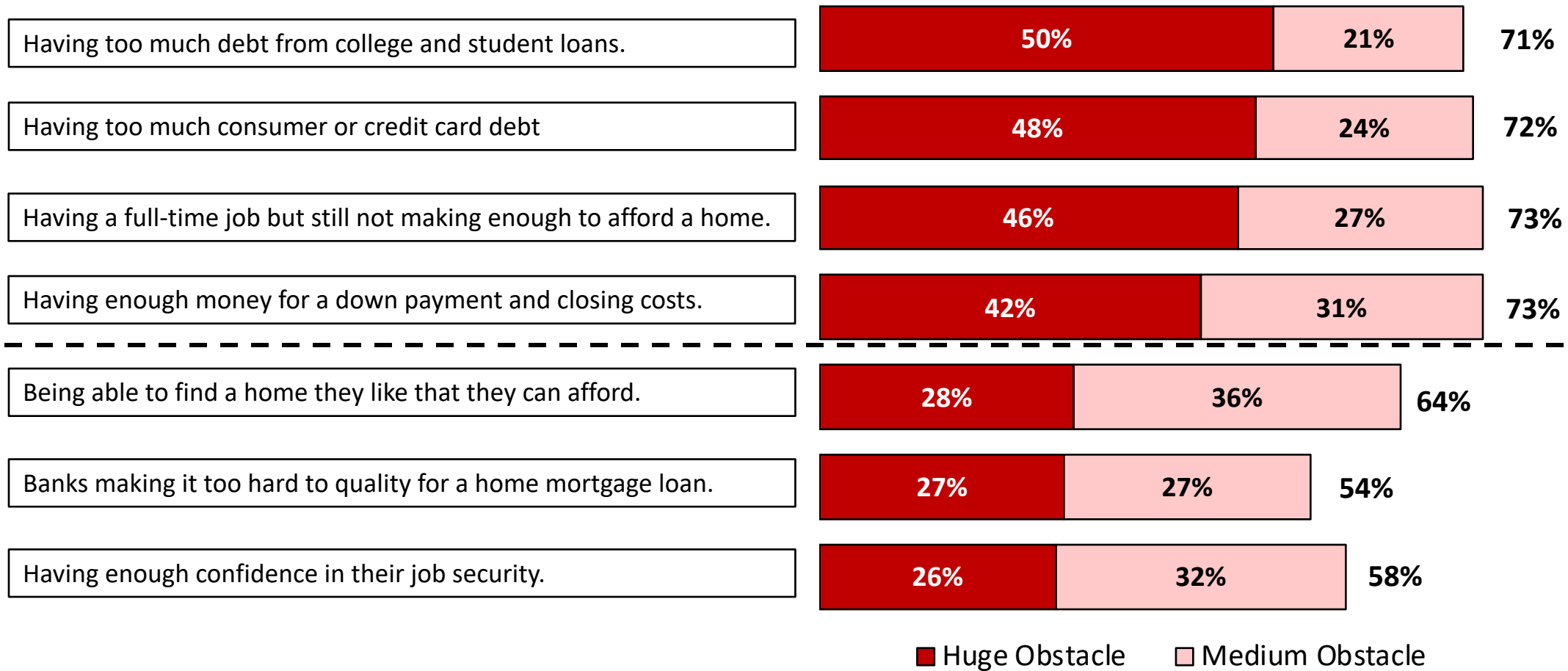
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Affording a New Home

Student and Credit Card Debt, Low Wages, and Down Payment Costs are Top Obstacles to Buying a Home

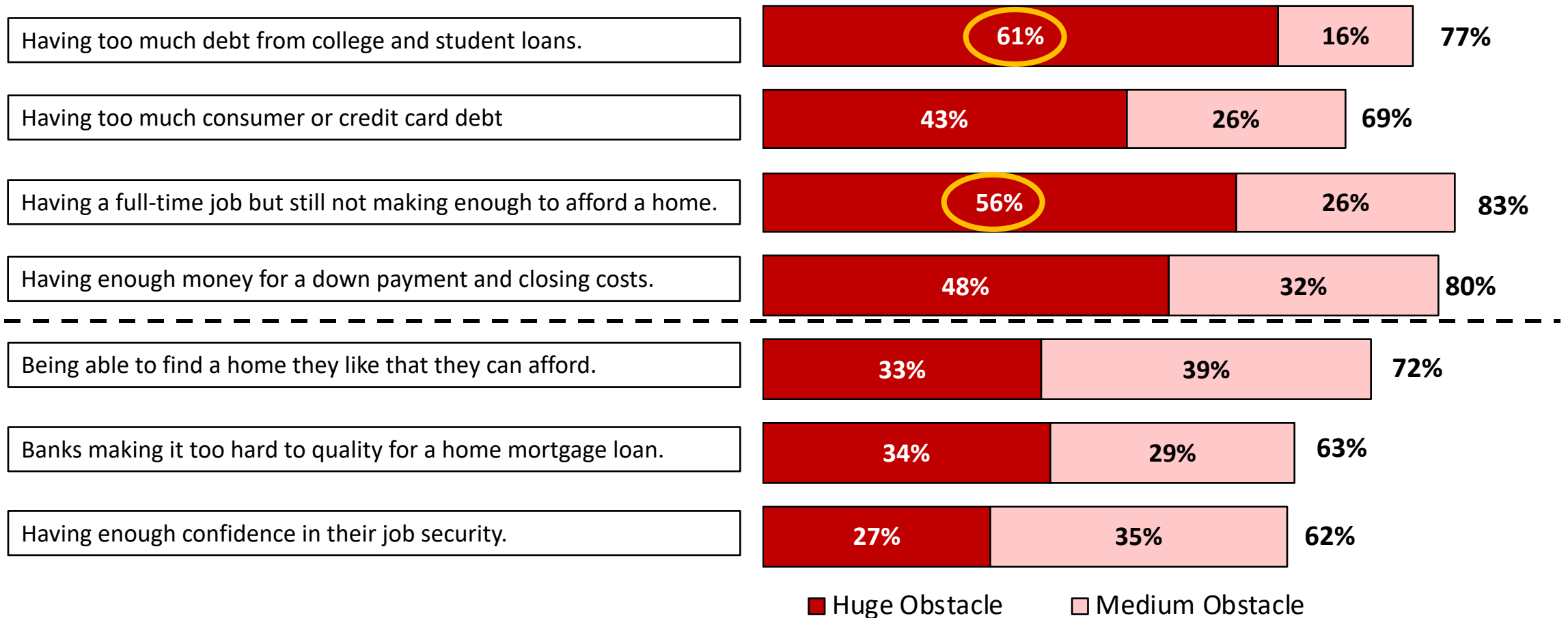
Potential Obstacles to Buying a Home



Now I am going to read several things some people have said makes buying a home too difficult or expensive. After I read each one please tell me whether you think that is a huge obstacle for people in central Indiana, a medium-size obstacle, a small obstacle, or not an obstacle at all that makes buying a home too difficult or expensive for people in central Indiana.

Over Half of Renters Who Would Prefer to Own Cite Student Debt and Low Wages as a Huge Obstacle to Home Ownership

Potential Obstacles to Buying a Home: Renters who would Prefer to Own

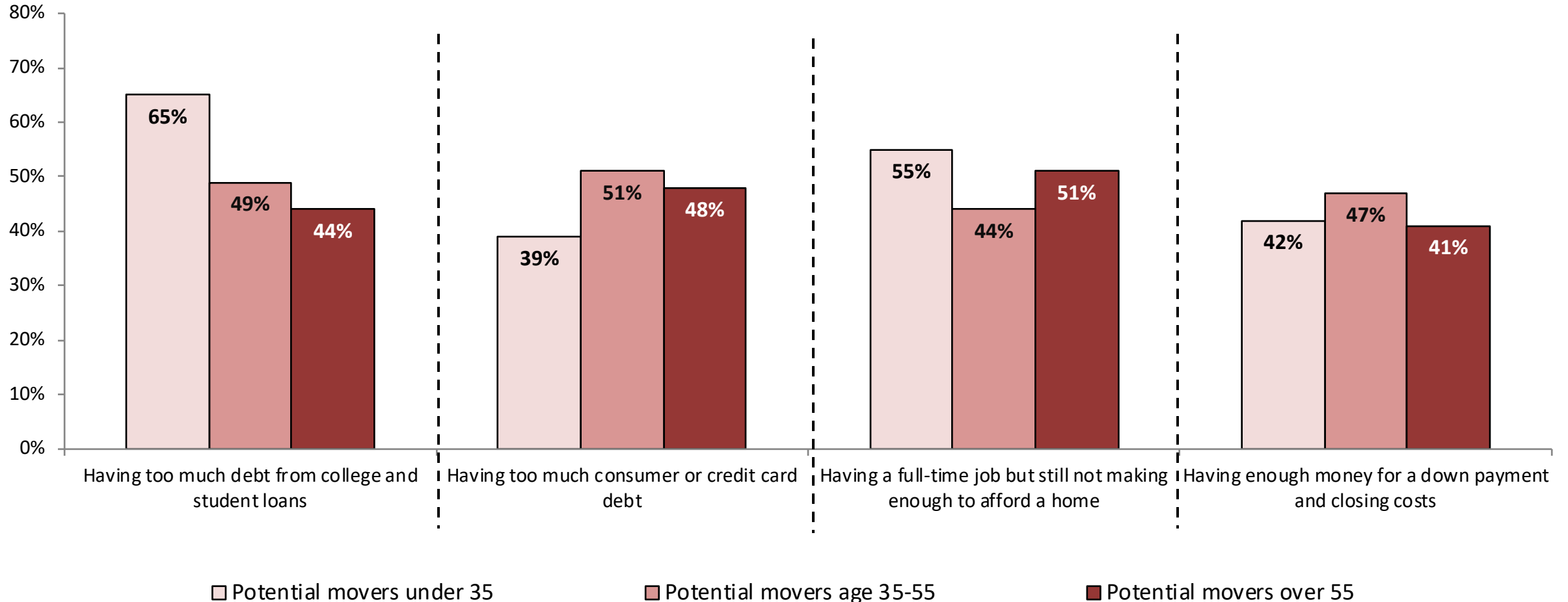


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Among All Potential Movers, Debt and Low Wages are Top Obstacles to Ownership

Two-thirds of potential movers under age 35 cite student loans as huge obstacle

Huge Obstacles to Buying a Home: Those Who Would Like to Move in the Next Few Years



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Central Indiana Smartgrowth Survey

August 2018

American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 2,163 adults, age 18 or older. The survey was conducted from August 2-26, 2018. The sample was randomly selected from TargetSmart's enhanced voter file. Fifty-two percent of respondents were reached on wireless phones, thirteen percent on VOIP phones, and thirty-six percent on landlines. Quotas were assigned to reflect the demographic distribution of voting age population in Indiana. The data were down-weighted to 1,750, and were weighted by gender, age, race, partisan score, county, and township to ensure an accurate reflection of the population. The overall margin of error is +/- 2.3%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding.