# 202 COMMUNITY PREFERENCE SURVEY







### MIBOR Smart Growth 2022 Survey Methodology



Wireless (58%) VOIP (3%) Landline (14%) Online (24%)



1500 Adults living within a MIBOR county



Interviews conducted April 18 – 29







### **Executive Summary**

- Quality of life in Central Indiana remains high. Broad geographic majorities across the region are satisfied with the quality of life. People in Hamilton and Johnson Counties are most enthusiastic, and those in Madison and Marion Counties are least enthusiastic. But overall numbers are positive across the region.
- People are most satisfied with the availability of hospitals and doctors' offices. Level of property taxes and access and quality of public transportation receive the lowest level of satisfaction.
  - Most satisfaction levels are in line, or slightly different, from 2018. The one exception is housing affordability. In 2018, just over half were satisfied with housing affordability, but that number dropped to only one-third who say they are satisfied with the affordability of housing.
- ➤ A safe community is by far the most important community aspect for people in Central Indiana. Level of crime is the most important issue across all regions of the area. Reliable, high-speed internet, housing affordability and quality streets and roads are also important to people. There has been little meaningful change as to what is important in communities since 2018.
- Quality of streets and roads and housing affordability see the biggest gap between satisfaction and importance. These are issues of high importance to people with low levels of satisfaction.







### **Executive Summary**

- People are more likely to say they would stretch their budget for their preferred neighborhood in 2022 than in previous years. People with children, and those with higher income levels are most likely stretch their budgets.
- > Single-family detached homes remain the preferred type of home for most, but there is an uptick in people who prefer a townhouse or apartment. Renters and people without children are most open to townhomes and apartments.
- People are split between a walkable neighborhood with a mix of housing and single-family home neighborhoods without walkability. Younger community members, those in the central and northern part of Marion County are most likely to prefer a walkable community.
- ➤ Since the pandemic, people are more likely to want to live closer to family, want a larger yard or access to more outdoor space, and to have a dedicated home office. People with children are much more likely to say they need more outdoor space. Younger people and those with children are most likely to see an increased importance in a home office.

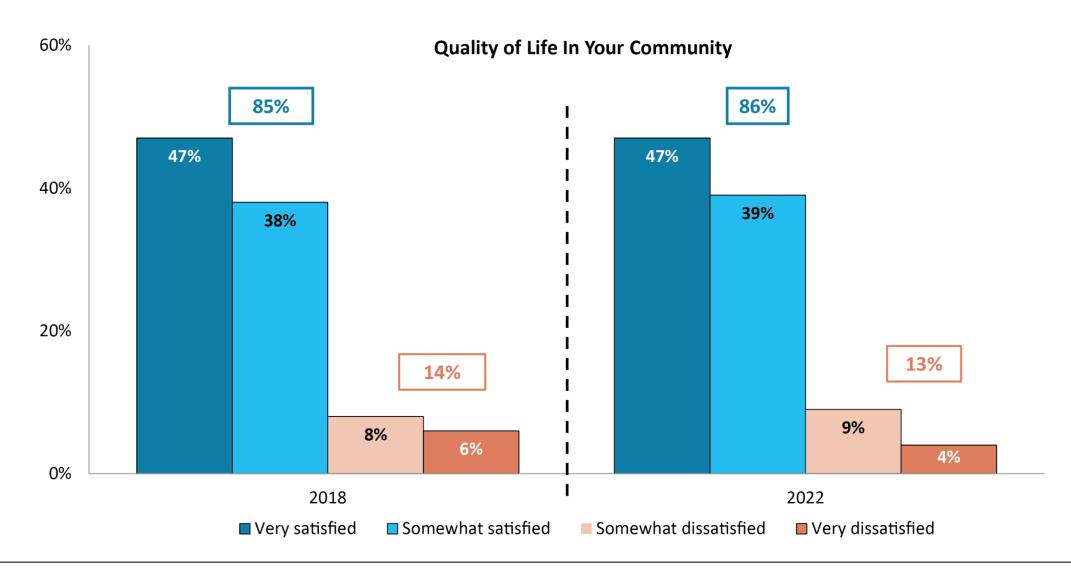






#### **Hoosiers Remain Satisfied with their Quality of Life**

Quality of life ratings are statistically identical to 2018.



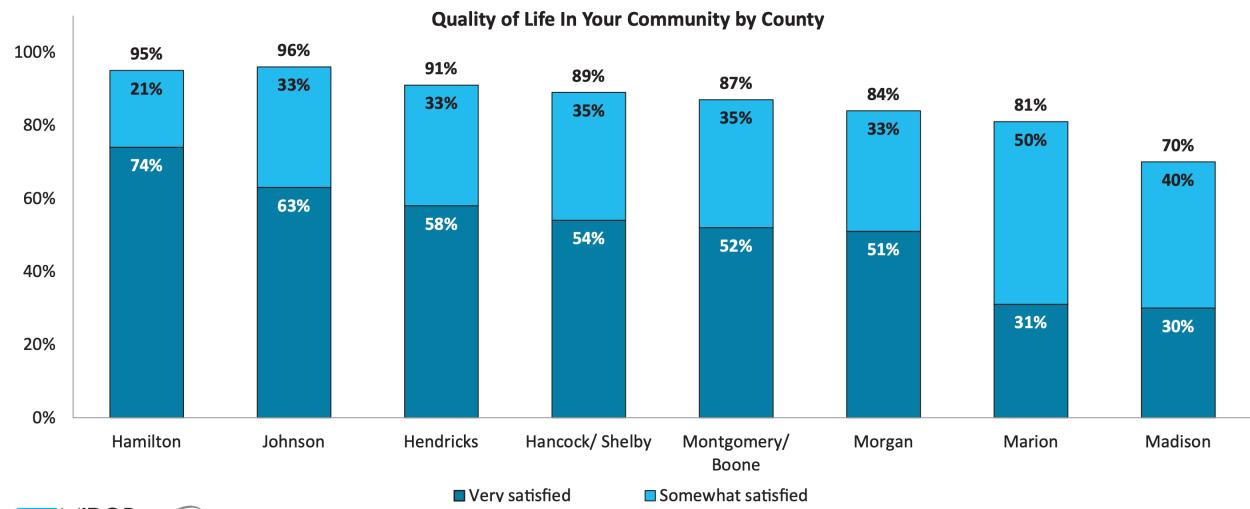






## Quality of Life Satisfaction Especially High in Hamilton, Johnson and Hendricks Counties

Large majorities across the region are happy with their quality of life.









#### Access to Hospitals and Healthcare Tops the Satisfaction List

#### Satisfaction with community on a scale of 1 to 5

Availability of hospitals and doctors' offices

Reliable, high-speed internet

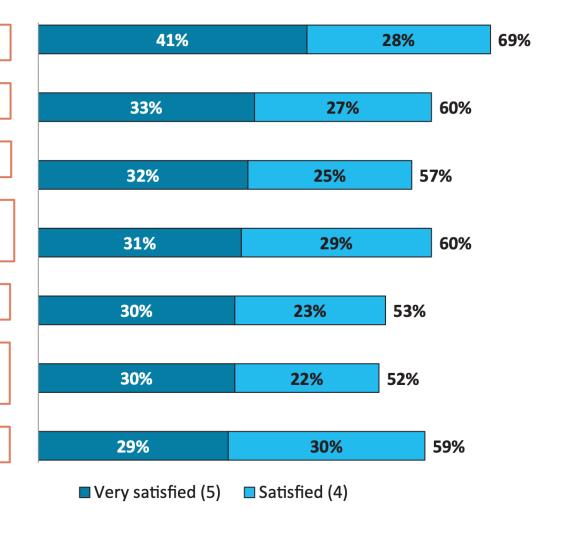
Parks, playgrounds, and trails nearby

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

High quality public schools

The length of your commute to school or work

Safety of the community and level of crime









### People Are Least Satisfied with Public Transportation, Property Tax Level, and Housing Affordability

Satisfaction with community on a scale of 1 to 5

**Sidewalks** 

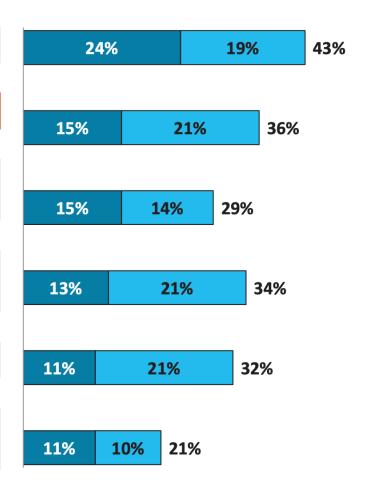
The quality of streets and roads

The number of shops or restaurants within walking distance of your home

The affordability of housing, including apartments, townhomes, and houses

Level of property taxes and other local taxes

Availability and quality of public transportation









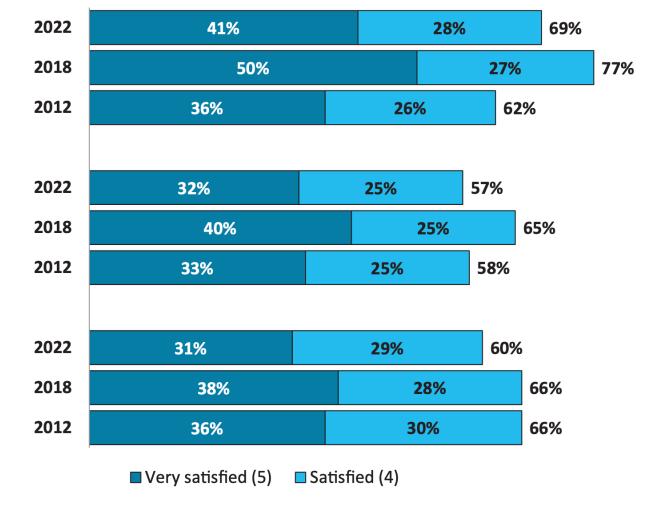
# Satisfaction Returns to 2012 Levels in Most Areas Tested; Medical, Recreational, and Cultural Resources Register Highest Overall Satisfaction

Satisfaction with community on a scale of 1 to 5

Availability of hospitals and doctors' offices

Parks, playgrounds, and trails nearby

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









### Second Tier Categories Include Schools, Commute and Safety

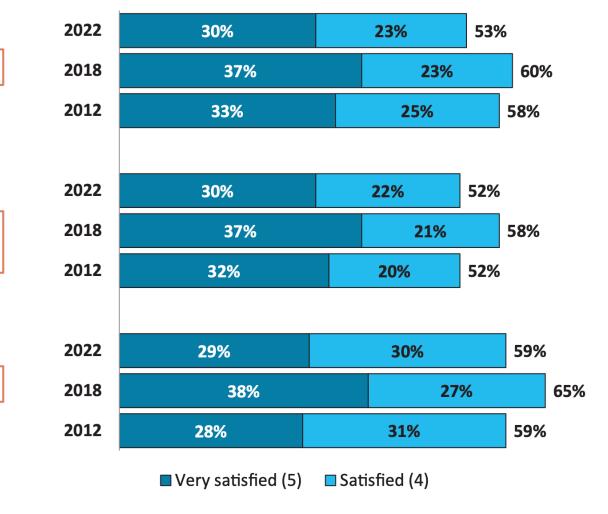
School satisfaction drops below 2012 level.

#### Satisfaction with community on a scale of 1 to 5

High quality public schools

The length of your commute to school or work

Safety of the community and level of crime









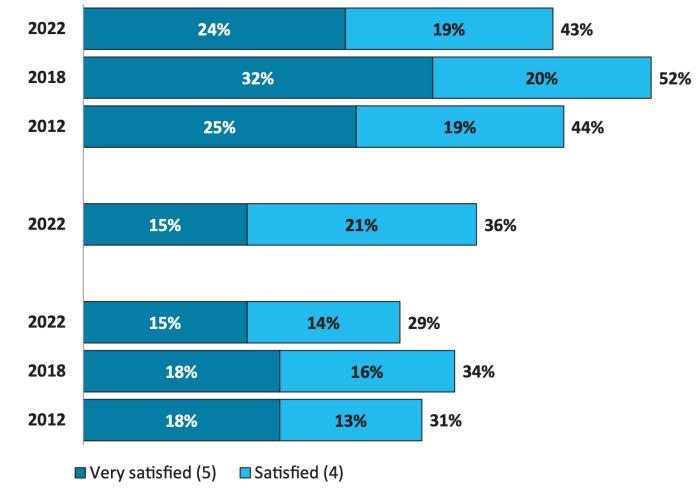
# Satisfaction with Road Quality and Walkability to Shops and Restaurants Consistently Lags Behind Other Neighborhood Qualities

#### Satisfaction with community on a scale of 1 to 5

**Sidewalks** 

The quality of streets and roads

The number of shops or restaurants within walking distance of your home









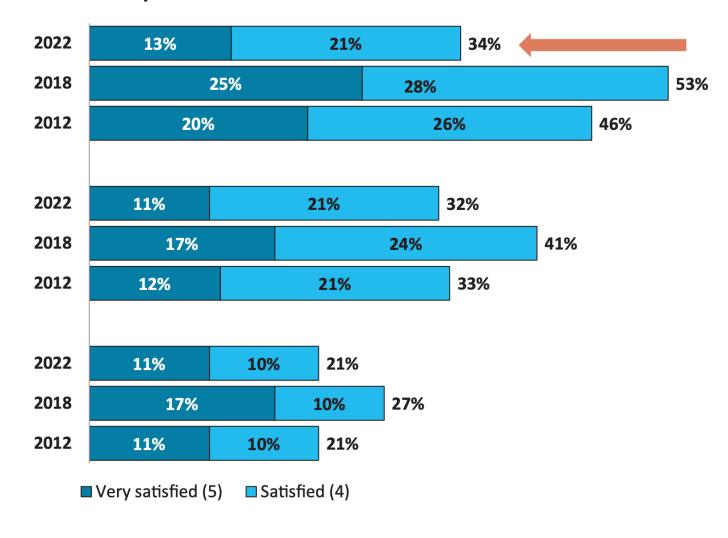
### Significant Drop in Satisfaction with Housing Affordability

#### Satisfaction with community on a scale of 1 to 5

The affordability of housing, including apartments, townhomes, and houses

Level of property taxes and other local taxes

Availability and quality of public transportation









### Marion, Madison, and Morgan Counties Register Lowest Satisfaction Scores on Most Items Tested

Satisfaction with community on a scale of 1 to 5 by County

% 4 or 5 Satisfied	Total	Hamilton	Hendricks	Johnson	Madison	Marion	Morgan	Montg/ Boone	Hancock / Shelby
Availability of hospitals and doctor's offices	68	84	79	81	59	64	48	62	66
Reliable, high-speed internet	60	75	64	64	46	57	52	57	59
Cultural resources like libraries, theaters, music venues and places of worship	60	79	51	67	53	54	50	67	60
Safety of the community and level of crime	59	86	80	83	52	38	64	71	71
Parks, playgrounds, and trails nearby	58	78	68	57	47	48	49	70	59
High quality public schools	54	79	68	72	38	38	50	68	57







### Marion, Madison, and Morgan Counties Register Lowest Satisfaction Scores

#### Satisfaction with community on a scale of 1 to 5 by County

% 4 or 5 Satisfied	Total	Hamilton	Hendricks	Johnson	Madison	Marian	Morgan	Montg / Boone	Hancock / Shelby
The length of your commute to school or work	53	60	63	59	42	49	36	52	51
Sidewalks	43	67	61	54	23	34	29	39	45
The quality of streets and roads	37	73	51	52	25	18	31	40	46
The affordability of housing, including apartments, townhomes, and houses	34	32	42	39	35	31	42	38	39
Level of property taxes and local taxes	31	43	34	35	32	24	37	36	40
The number of shops or restaurants within walking distance of your home	29	32	30	35	18	32	24	22	17
Availability and quality of public transportation	21	12	15	15	25	29	6	12	16







### Public Safety Tops Community Feature List; Internet, Schools, Housing Costs, Roads and Medical Access All Rank High

#### Importance of community features on a scale of 1 to 5

Safety of the community and level of crime

Reliable, high-speed internet

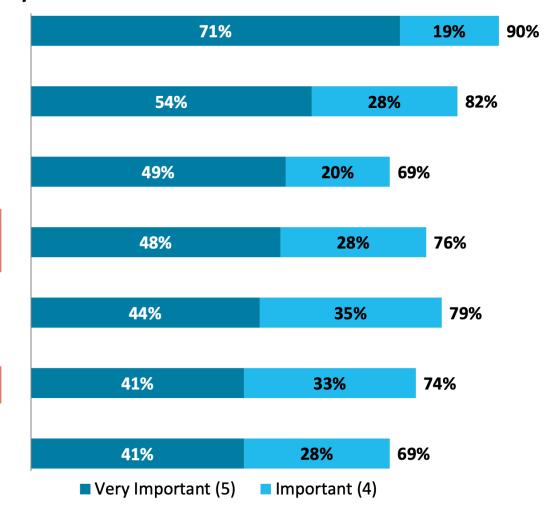
High quality local schools

The affordability of housing, including apartments, town homes, and houses

The quality of streets and roads

Availability of hospitals and doctors' offices

Level of property taxes and other local taxes









### Commute Length, Walkability, and Public Transit Relatively Less Important

#### Importance of community features on a scale of 1 to 5

Parks, playgrounds, and trails nearby

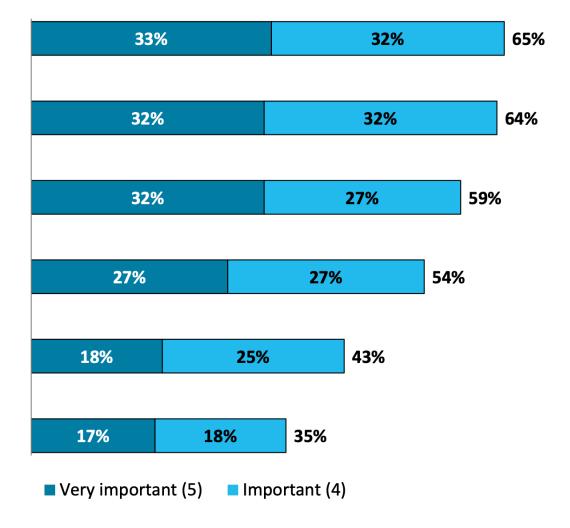
Cultural resources like libraries, theaters, music venues, and places of worship

**Sidewalks** 

The length of your commute to school or work

The numbers of shops or restaurants within walking distance of your home

Availability and quality of public transportation









### Importance Levels Vary by Geography on Many Attributes

Walkability and access to public transportation more important to urban residents.

#### Importance of community features on a scale of 1 to 5

% 4 or 5 Satisfied	Total	Total Rural	Total Suburb	Total Urban
Safety of the community and level of crime	91	94	91	88
Reliable, high-speed internet	82	79	83	81
The quality of streets and roads	79	77	79	79
The affordability of housing, including apartments, townhomes, and houses	76	73	76	79
Availability of hospitals and doctors' offices	73	70	75	72
High quality local schools	69	68	73	62
Level of property taxes and other local taxes	68	76	68	64
Parks, playgrounds, and trails nearby	65	57	64	74
Cultural resources like libraries, theaters, music venues, and places of worship	64	55	65	69
Sidewalks	59	43	60	69
The length of your commute to school or work	53	50	54	55
The number of shops or restaurants within walking distance of your home	43	35	42	50
Availability and quality of public transportation	35	23	33	47







### Road Quality, Housing Costs, and Taxes Have High Importance But Low Levels of Satisfaction

Satisfaction with and Importance of community amenities on a scale of 1 to 5

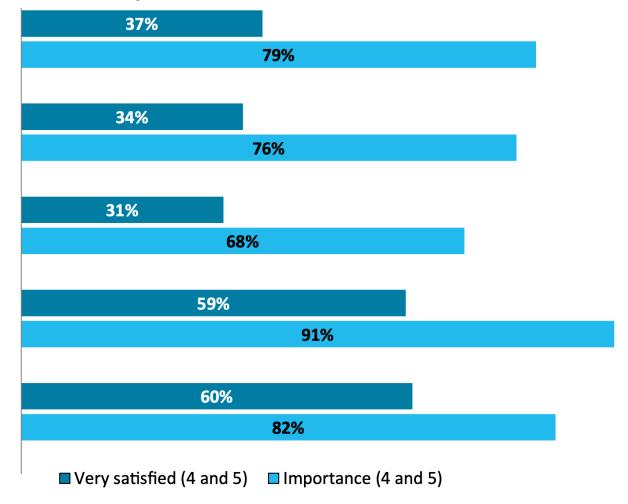
The quality of streets and roads

The affordability of housing, including apartments, townhomes, and houses

Level of property taxes and other local taxes

Safety of the community and level of crime

Reliable, high-speed internet









# Smaller Mismatch Between Importance and Satisfaction on Sidewalks, Schools, Walkability and Transit Options; Other Items in Line With Each Other

Satisfaction with and Importance of community amenities on a scale of 1 to 5

Sidewalks

High quality public schools

The number of shops or restaurants within walking distance of your home

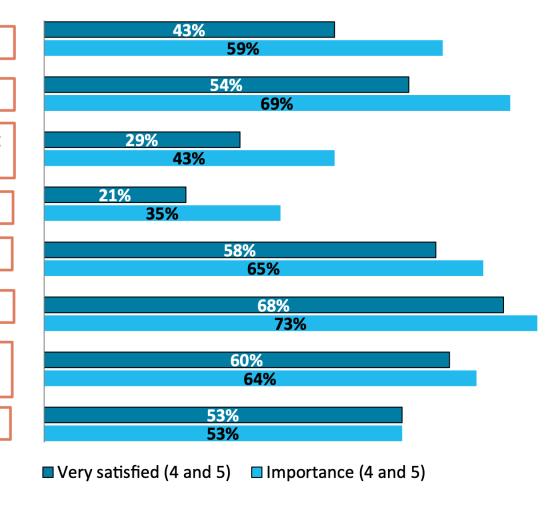
Availability and quality of public transportation

Parks, playgrounds, and trails nearby

Availability of hospitals and doctors' offices

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

The length of your commute to school or work









# What's Important in Deciding Where to Live



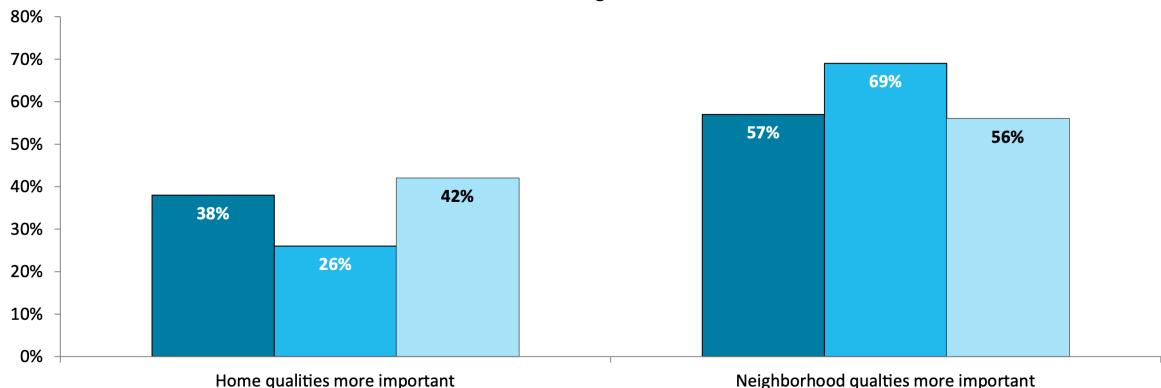




### **Over Half Put Neighborhood Qualities Before House Qualities**

Percentage of those who say house quality is more important increases from 2018





\*Language slightly different in 2012

**2012 2018 2022** 

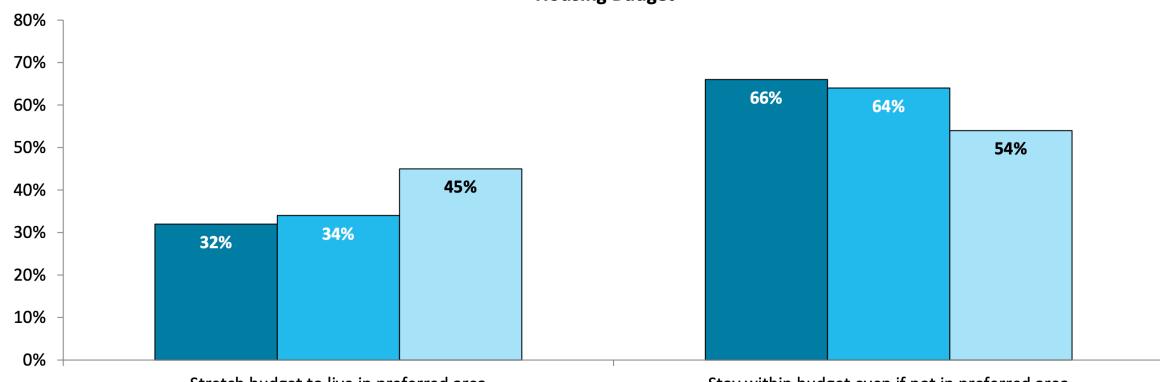






## People Are More Likely to Spend More to Live Where They Want Compared to Past Surveys





Stretch budget to live in preferred area

Stay within budget even if not in preferred area

**2012 2018 2022** 



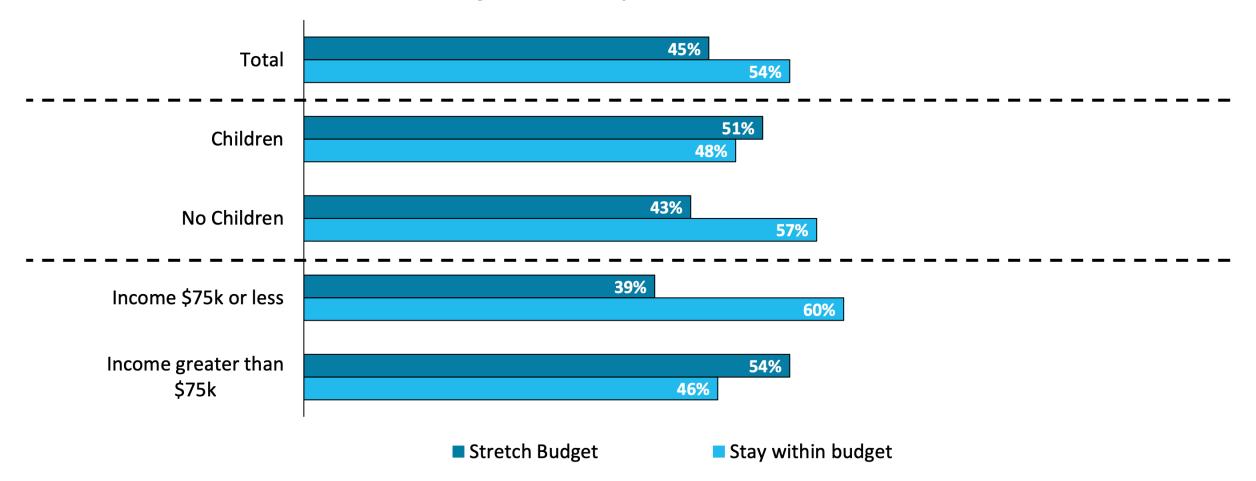




<sup>\*</sup>Language slightly different in 2012

# People with Children and Higher Income Levels Most Likely to Stretch Their Budget

**Budget Preference by Children Status and Income** 





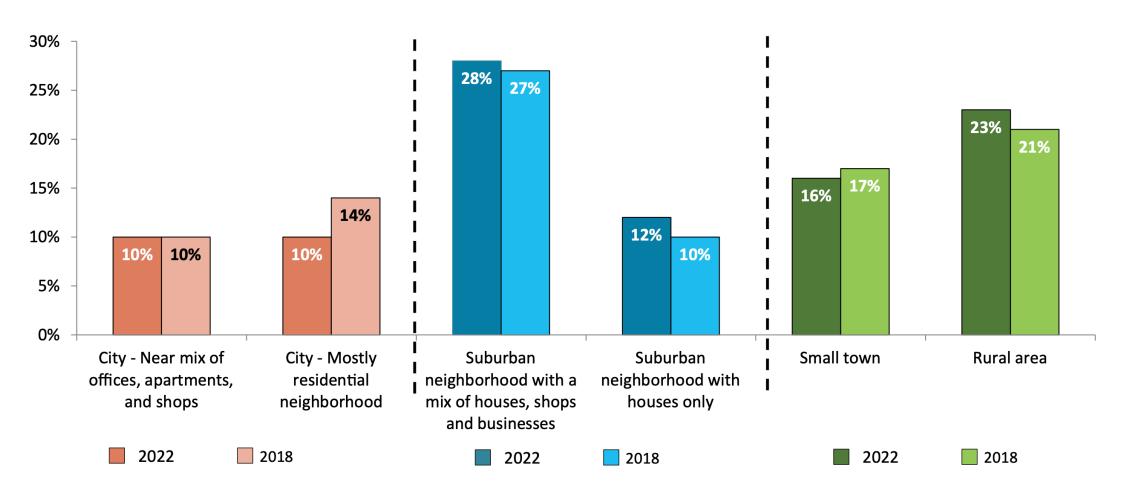




#### Most Prefer to Live in Suburban Neighborhood with Commercial Areas

Preference remains unchanged since 2018

#### **Preferred Areas to Live**

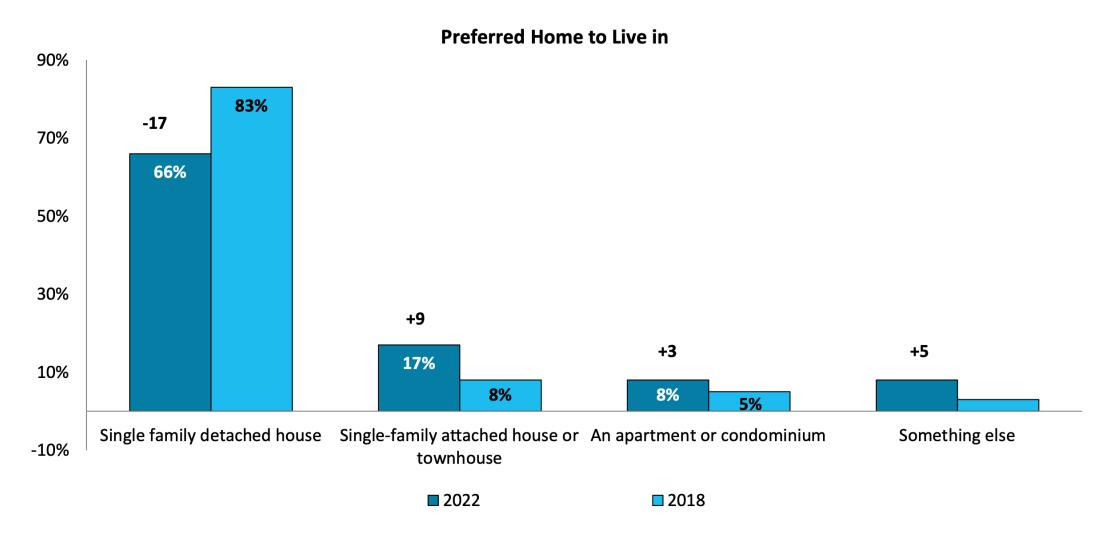








# Single-Family Detached Home Remains the Most Preferred Type of Home



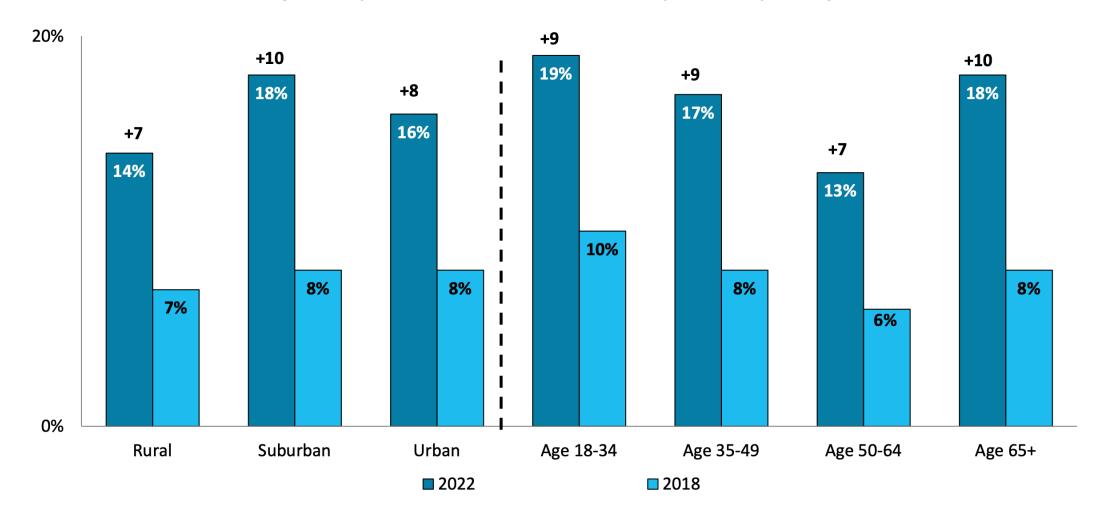






### Increase in Preference for Townhomes is Broad Demographically

Single-family Attached House or Townhouse by Urbanicity and Age



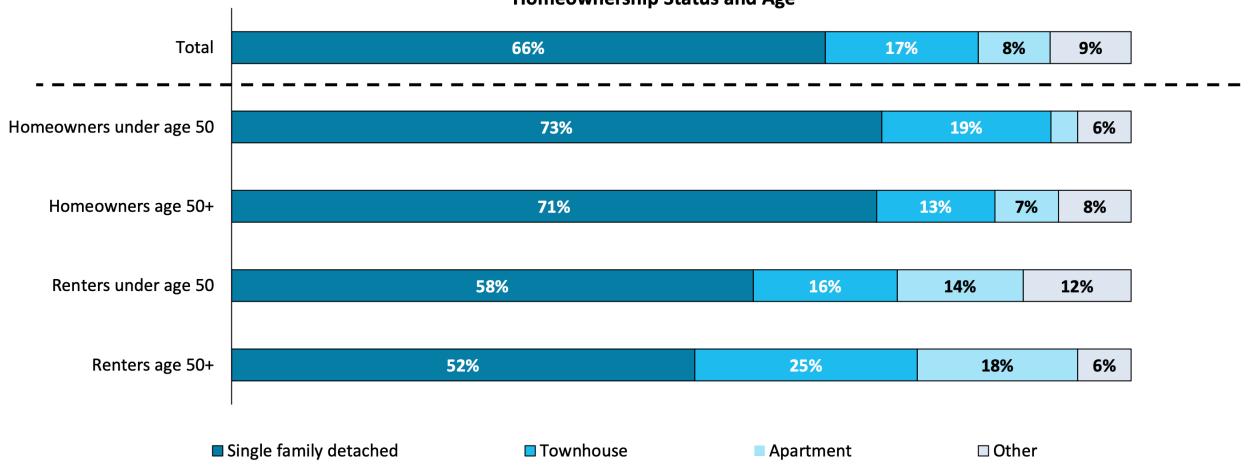






# Homeowners, Both Young and Old More Likely to Prefer Single Family Detached Homes

Housing Type Preferences by Homeownership Status and Age



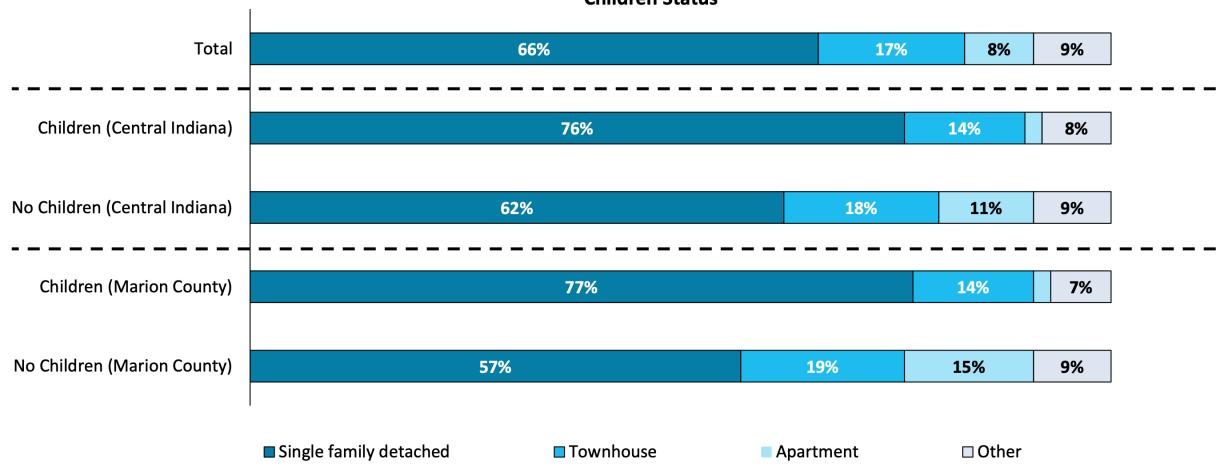






### People Without Children More Open to Townhomes and Apartments, Especially in Marion County

### Housing Type Preferences by Children Status





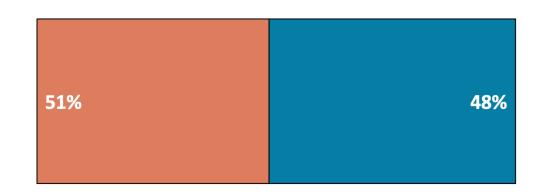




# People Split Between Walkable Neighborhood with Mix of Housing And Single-Family Home Neighborhoods Without Walkability

#### **Preferred Neighborhood:**

A neighborhood with
a mix of different
kinds of housing
where you can walk
to stores and
restaurants



A neighborhood
with single-family
homes only where
you have to drive to
stores and
restaurants







### Younger Community Members More Likely to Lean in Favor of Walkable Communities

Renters and single people more likely to favor walkable neighborhoods

A neighborhood with

a mix of different

kinds of housing

where you can walk

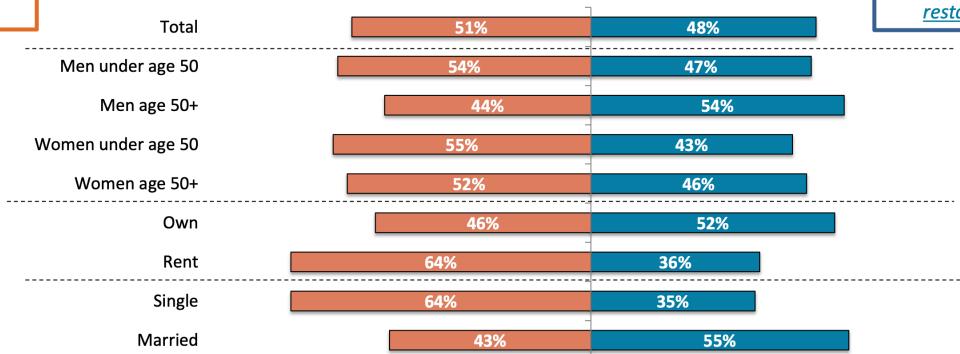
to stores and

restaurants

Preferred Neighborhood

By Age/Gender and Age/Education

A neighborhood
with single-family
homes only where
you have to drive to
stores and
restaurants



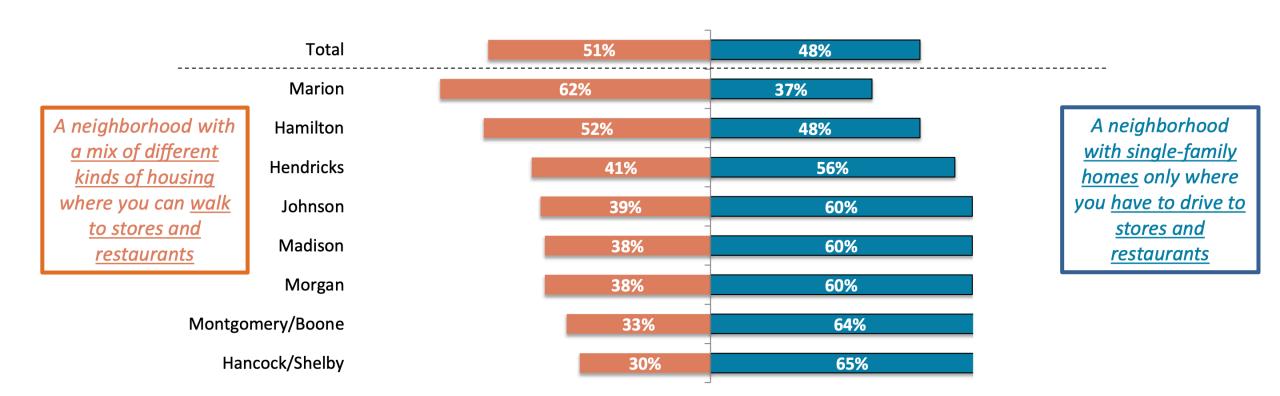






### Marion and Hamilton Counties Most Open to Walkable Communities

### Preferred Neighborhood By County

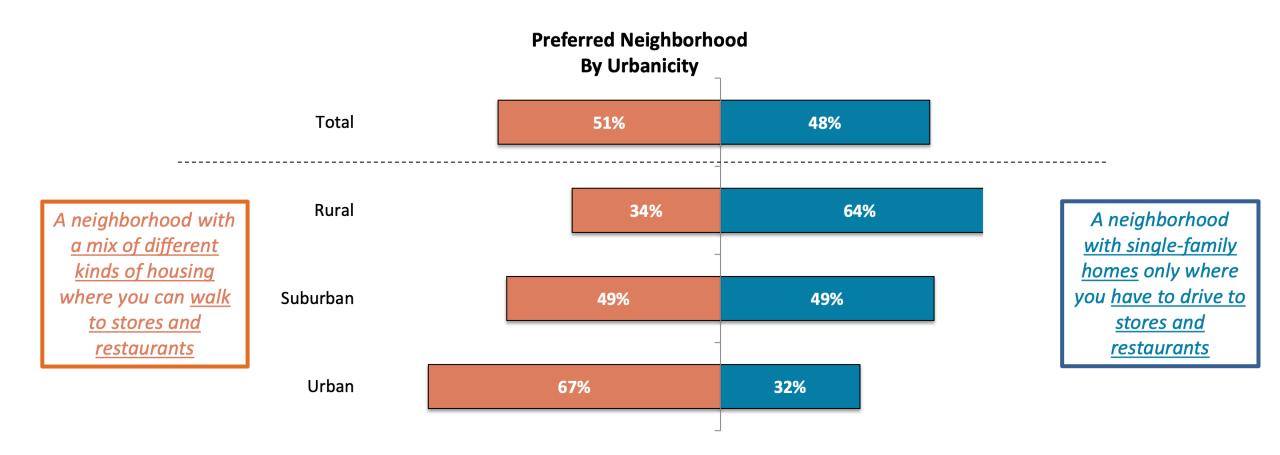








# **Existing Community Density Important Determinant of Walkability Preference**









# Home Preference Has No Clear Correlation With Community Type Preference

**Preferred Neighborhood By Housing Type Preference** 

A neighborhood with

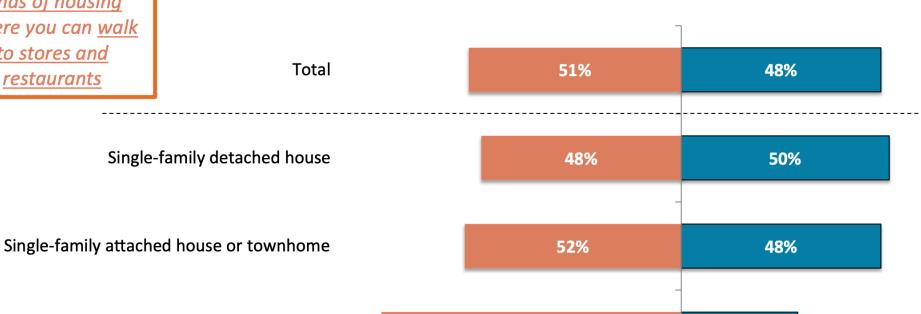
a mix of different

kinds of housing

where you can walk

to stores and

restaurants



28%

72%

A neighborhood
with single-family
homes only where
you have to drive to
stores and
restaurants





Apartment or condominium



### **Current Preferences**

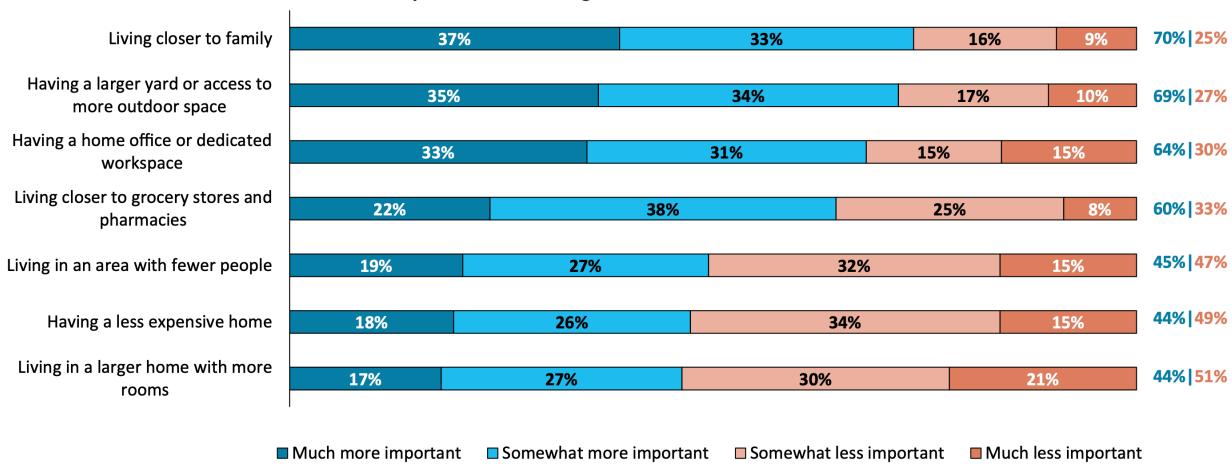






### Pandemic Generates Greater Desire to Be Close to Family, Dedicated Office, and Have More Outdoor Space

#### **Importance of Housing Qualities Post-Pandemic**









#### Women 50 and Older See Living by Family as Much More Important

Younger people, especially women, see large outdoor space and a home office as more important.

#### Importance of Housing Qualities Post-Pandemic by Age/Gender

% Much more important by Gender/Age	Total	Men under 50	Men 50+	Women under 50	Women 50+
Living closer to family	37	31	31	36	48
Having a larger yard or access to more outdoor space	35	39	26	46	28
Having a home office or dedicated workspace	33	37	25	48	22
Living closer to grocery stores and pharmacies	22	18	19	27	25
Living in an area with fewer people	19	21	20	17	19
Having a less expensive home	18	18	12	25	16
Living in a larger home with more rooms	17	20	11	25	10

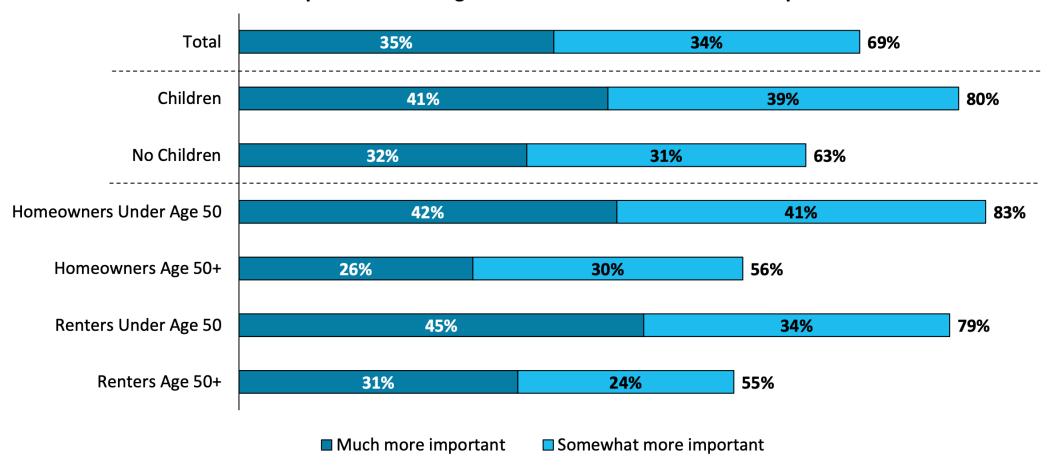






# In Central Indiana, People With Children Are Much More Likely to See the Need for More Outdoor Space

#### Importance of a Larger Yard or Access to More Outdoor Space



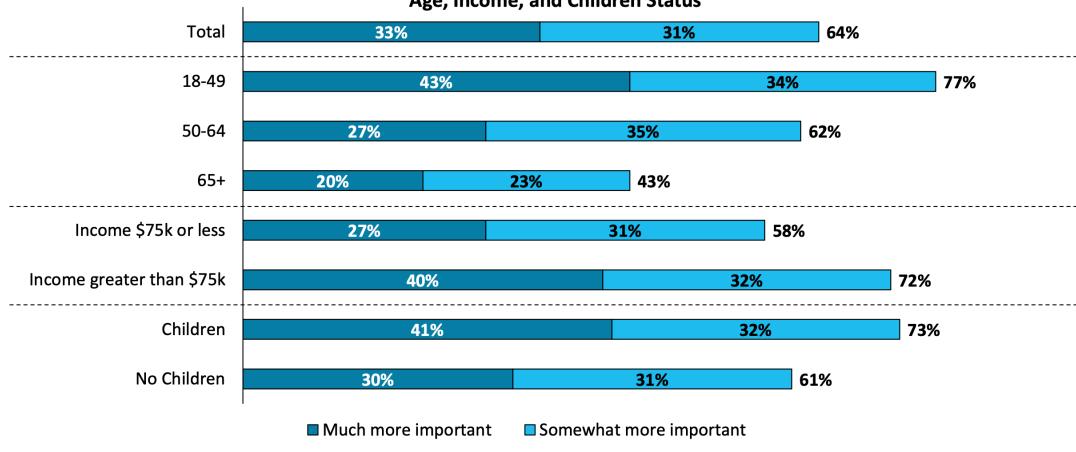






# Those Under Age 50, Making \$75k or More a Year, and With Children Are Most Likely to See Increase in Importance of Office

### Importance of a Dedicated Workspace by Age, Income, and Children Status

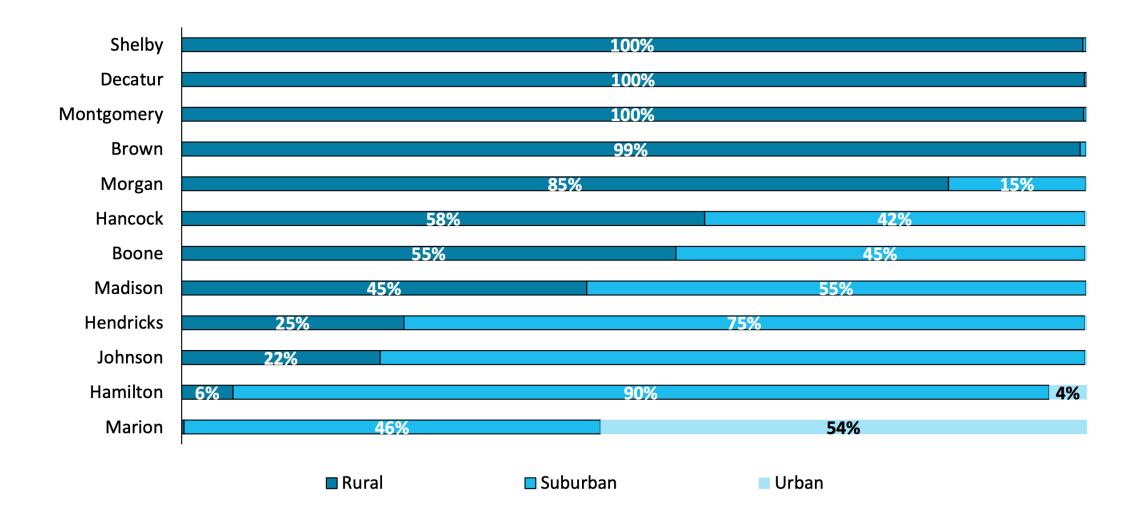








### **Urbanicity Breakout By County**









# Central Indiana Smartgrowth Survey

**April 2022** 

American Strategies designed and administered this multimodal survey conducted by professional interviewers and via Qualtrics. The survey reached 1,500 adults, age 18 or older, who indicated they lived within a MIBOR county. The survey was conducted from April 18-29, 2022.

Fifty-eight percent of respondents were reached on wireless phones, three percent on VOIP phones, and fourteen percent on landlines. Twenty-four percent of respondents were online. Quotas were assigned to reflect the demographic distribution of adults in MIBOR counties, and the data were weighted to ensure an accurate reflection of the population. The sample was drawn from a third-party vendor voter file. The overall margin of error is +/- 2.5%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding.





