

HOME
BUILDERS
ASSOCIATION



OF NORTHERN CALIFORNIA

Consumer Preference
Survey
Results and Analysis

Prepared by

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Overview - *Click any question to be directed to survey results.*

- Q1. What is your age?
- Q2. Are you married or single?
- Q3. How many children do you have living with you?
- Q4. Which group best describes your annual household income?
- Q5. Will you/do you or anyone in your home work full-time or regular part-time out of your home?
- Q6. In which of the following counties do you work?
- Q7. In which counties are you considering/did you consider for the purchase of your new home?
- Q8. Will this be/was this your first home purchase?
- Q9. What is your monthly rent or mortgage?
- Q10. Do you own or rent your current home?
- Q11. Did you purchase your home as a new unit or as a re-sale?
- Q12. Phone: Do you now rent an apartment, townhome, condo or single family detached home? Mail: Did you purchase an attached home (townhome, condo) or a detached single family home?
- Q13. In your new home search, are you/were you considering single family detached homes, attached homes such as townhomes and condos, or are you/were you considering both.
- Q14. On a scale from 1 to 7, with 1 being "mainly considering/considered an attached home" and 4 being "considering/considered attached or detached equally", and 7 being "mainly considering/considered a single family detached home." How would you rate your preference?
- Q15. Reasons for consideration of detached homes only
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- Q17. Reasons for consideration of attached homes only.
- Q18. Phone: Do you intend to purchase your home within the same region in which you now rent or own a home? Mail: Did you purchase your home within the same county in which you previously lived.

- Q19. What is your primary reason for staying in this region.
- Q20. What is/was your primary reason for moving to a different area?
- Q21. Is/was your move motivated more by your dissatisfaction with your living condition or by the
- Q22. How would you rank traffic conditions in your area? opportunity presented in the new environment?
- Q23. How far would you be willing to drive one-way to and from work in order to minimize your housing costs?
- Q24. Degree of inclination to commute further for relatively higher density attached housing.
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- Q27. Why would you be/have been less inclined to commute further for relatively higher density attached housing?
- Q28. Why would you be/have been more inclined to commute further for relatively higher density attached housing?
- Q29. Would you be/have been more or less inclined to commute further for relatively lower density single family detached housing?
- Q30. How much do you agree or disagree with the following statement (Scenario A): "I would pay less or equal to my current housing costs for higher density, attached housing near my job?"
- Q31. How much do you agree or disagree with the following statement (Scenario "B"): "I would pay more than my current housing costs for higher density, attached housing near my job?"
- Q32. How much do you agree or disagree with the following statement (Scenario "C"): "I would pay less or equal to my current housing costs for lower density, detached housing far from my job?"
- Q33. How much do you agree or disagree with the following statement (Scenario "D"): "I would pay more than my current housing costs for relatively lower density, detached housing near my job?"

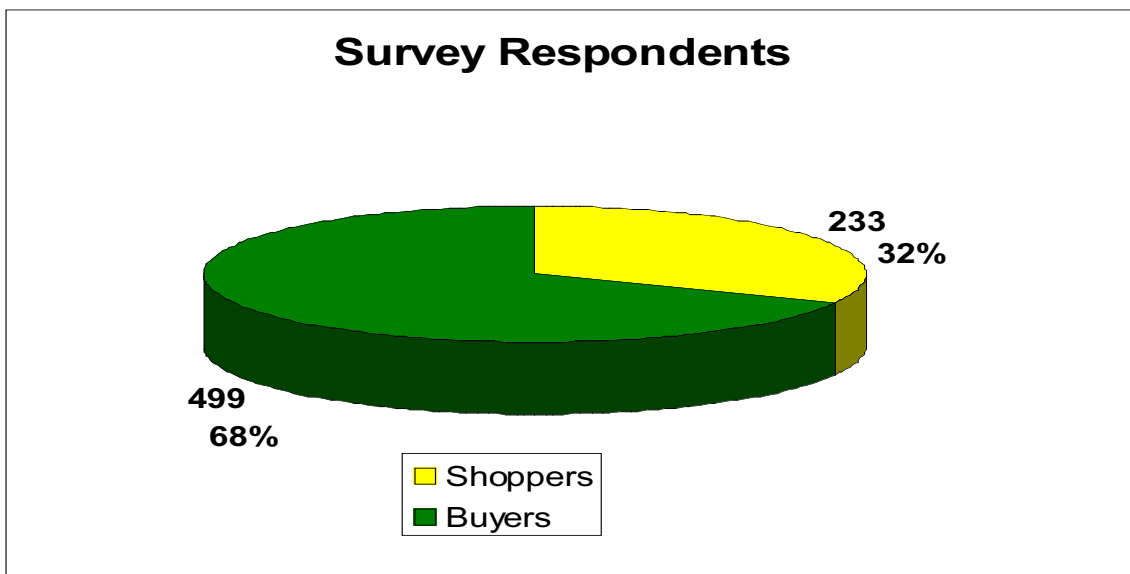
- Q34. On a scale from 1 to 7 (1 being top priority and 7 being totally unimportant), how important is/was "accessibility to public transit" to your home purchase decision?
- Q34A. On a scale from 1 to 7 (1 being top priority and 7 being totally unimportant), how important is/was "to live near uncongested roadways" to your home purchase decision?
- Q35. On a scale from 1 to 7 (1 being top priority and 7 being totally unimportant), how important is/was "quality of schools" to your home purchase decision?
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- Q37. On a scale from 1 to 7 (1 being top priority and 7 being totally unimportant), how important is/was "desirability of floor plans" to your home purchase decision?
- Q38. Will you/do you work and live in the same county?
- Q39. Primary reason for working and living in then same county?
- Q40. Primary reason for not working and living in the same county.
- Q41. How many cars are there in your household?
- Q42. How many licensed drivers reside or will be residing at your home?
- Q43. What is, or will be, the primary means by which you get to and from work?
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- Q47. In general would you prefer to see new homes built near public transit?
- Q48. Phone: If public transit were more accessible to new homes, how much impact would this have on your decision to purchase in these types of communities?
- Mail: How much impact did accessibility to public transit have on your home purchase decision?
- Q49. Phone: If more new homes were built accessible to roadways with additional capacity, how much impact would this have on your decision to purchase in these types of communities?

Mail: How much impact did accessibility to roadways with additional capacity have on your home purchase decision?

Overview

The Home Builders Association of Northern California, working in conjunction with the California Alliance for Jobs and National Survey Systems, recently completed an in-depth survey of new home buyers and shoppers. The purpose for the survey was two fold: 1) to gather consumer information regarding housing densities, styles (e.g., attached vs. detached) and relative geographical preferences; and 2) to collect data about transportation choices.

The project was administered using phone interviews and mailed surveys. A total of 233 new home shoppers were interviewed by phone, and 499 mailed surveys were completed and returned. Respondents were grouped according to their respective sub-regions and whether or not they were considering, or had considered, a single family detached unit only, or both attached and detached units. The following chart and table illustrates the survey composition:



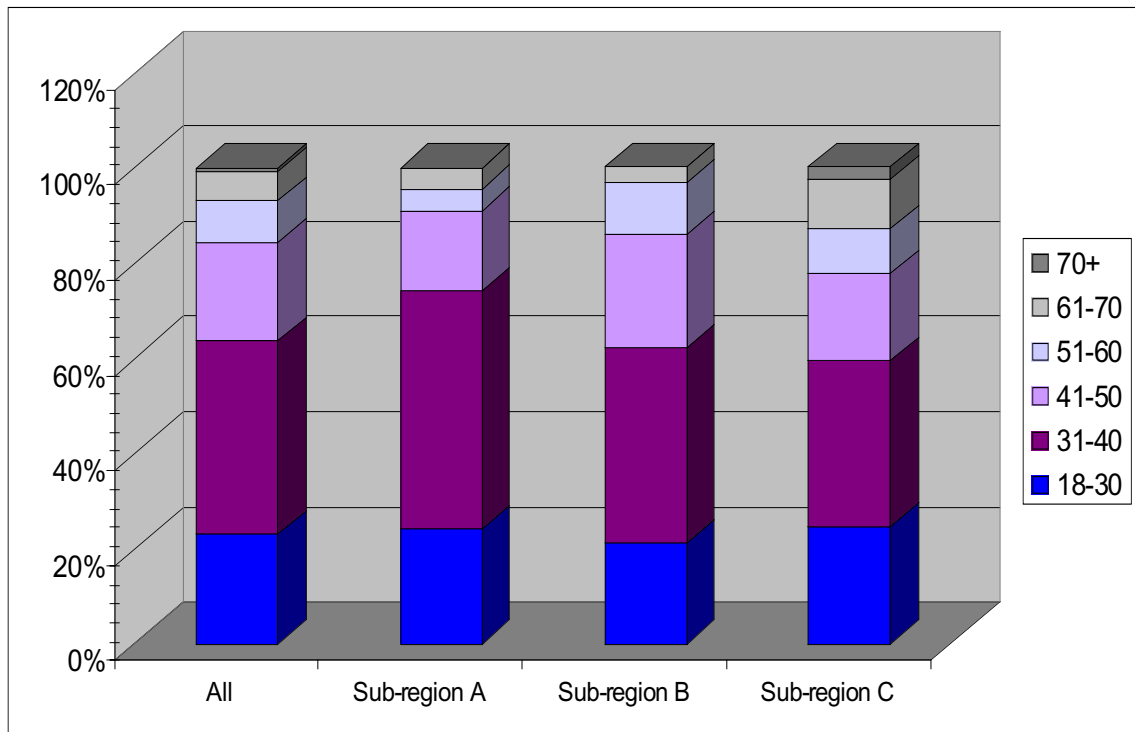
New Home Shoppers/ <i>phone</i>						New Home Buyers/ <i>mailed</i>					
Sub-region A		Sub-region B		Sub-region C		Sub-region A		Sub-region B		Sub-region C	
Santa Clara County (57)		Alameda and Contra Costa Counties (165)		Merced, San Benito, San Joaquin and Stanislaus Counties (11)		Santa Clara County (97)		Alameda and Contra Costa Counties (163)		Merced, San Benito, San Joaquin and Stanislaus Counties (239)	
Both Att/Det (21)	Detached (36)	Both Att/Det (47)	Detached (118)	Both Att/Det (0)	Detached (11)	Both Att/Det (33)	Detached (64)	Both Att/Det (22)	Detached (141)	Both Att/Det (18)	Detached (221)

Q1. What is your age?

Base = Total respondents

Forty-one percent of respondents said they are 31-40 years of age. Fifty percent of those surveyed from Sub-region A are 31-40. The median age is 36.64 years while the mean age was slightly older at 38.91 years.

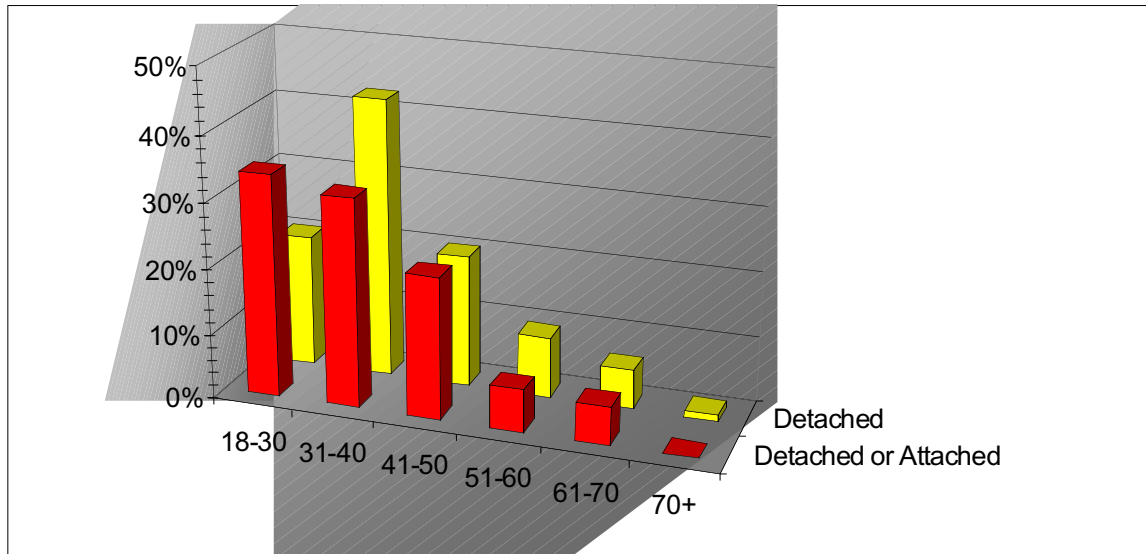
Age Distribution



In general, younger respondents were more likely to consider detached or attached units than relatively older respondents.

Sixty-one percent of respondents from Sub-region A that were considering or had considered detached homes only, are aged 31-40. In Sub-regions B and C, the proportion of respondents that had considered or were considering detached homes only was spread more evenly. Respondents that had considered or were considering detached or attached homes in Sub-region A were more likely to be 18-30 years old. In Sub-regions B and C, they were more likely to be 31-40.

Housing Preference by Age Cohort



Q2. Are you married or single?

Base = Total respondents

Just over three-quarters of all respondents said they were married. This proportion did not deviate by more than 1.9% among the three sub-regions. Of those who said they are considering detached or attached housing, 62% were married. This was 18% lower than the number of married couples considering detached housing only. In Sub-region A, 59% of those who said they were considering detached or attached housing were married. This was 11% lower than that registered for Sub-region B.

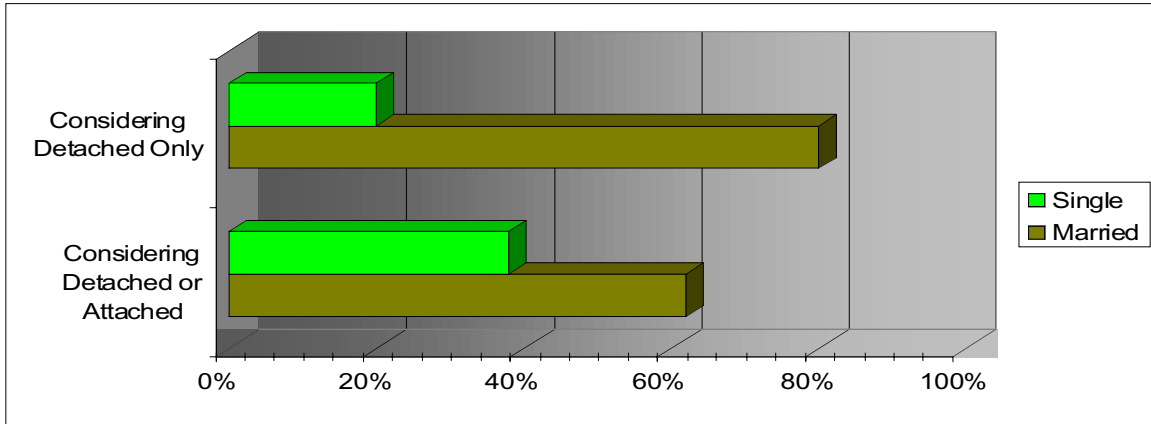
Married households earned higher incomes than single ones. Of those households that earned \$100,000 or more annually, 83% were comprised of married couples.

Q3. How many children do you have living with you?

Base = Total respondents

Most respondents have no children living with them (37%). The second most common response was two (2) children at 26% followed by one (1) at 22%. The mean number of children for all sub-regions was 1.96.

Married and Single Housing Preferences

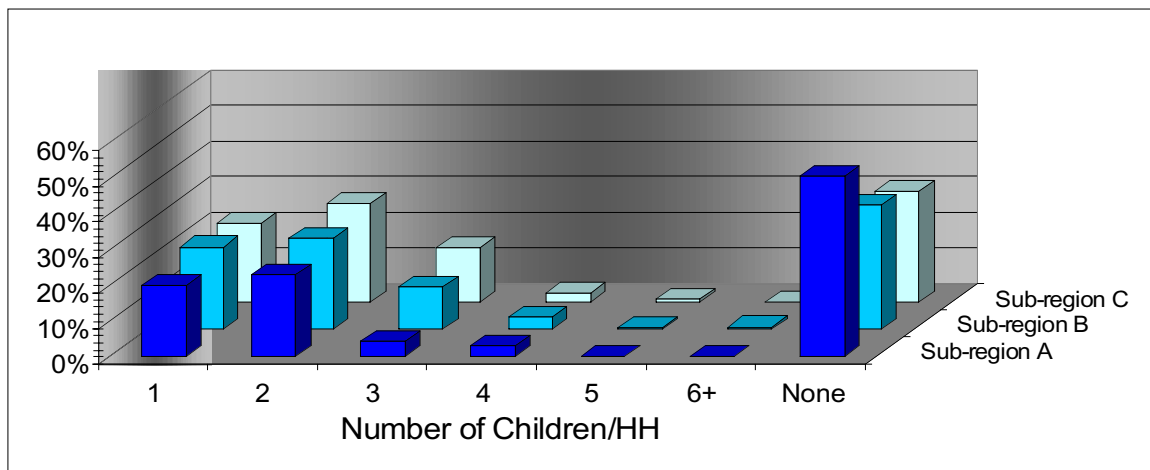


In all cases, respondents from each of the three sub-regions reported that the most common number of children per household was none. Over 50% of those from Sub-region A said there were no children living with them. This compared to 35% for Sub-region B and 31% for Sub-region C.

The majority of respondents considering detached housing only and that had children, had two (2) living with them. Those considering detached or attached housing and who had children living with them, were most likely to only have one (1).

Among those respondents considering detached or attached housing in Sub-Region A, 72% said there are no children living with them. This was 25% higher compared to respondents from Sub-region B who were also considering detached or attached housing.

Number of Children per Household by Sub-region



Q4. Which group best describes your annual household income?

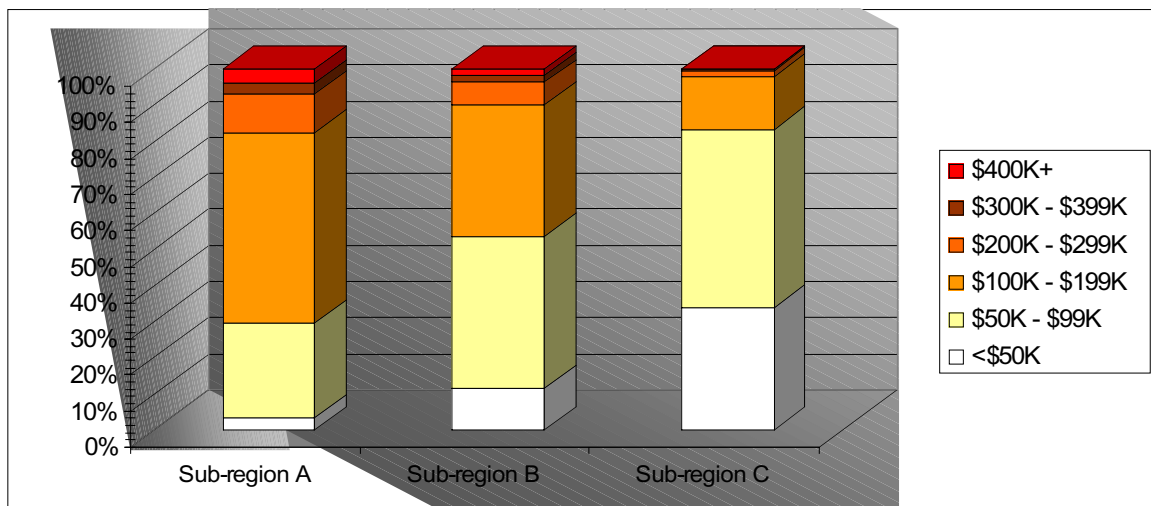
Base = Total respondents

Most respondents (41%) said that \$50,000 to \$99,000 best describes their annual household income. The second most common response was \$100,000 to \$199,000 at 33%. The median household income for all respondents was \$88,500 and the mean income was \$109,600.

The average income among those who said they were considering detached housing only was \$112,000. This was \$14,500 more than the average registered by respondents considering detached or attached housing.

Over half of the respondents from Sub-region A said their household income was \$100,000 to \$199,000. Eleven percent said their household income was between \$200,000 and \$299,000, and 4% indicated it was over \$400,000. Incomes were relatively modest in Sub-regions B and C where most households earned between \$50,000 and \$99,000 annually.

Household Income by Sub-region



Q5. Will you/do you or anyone in your home work full-time or regular part-time out of your home?

Base = Total respondents

Most respondents (55%) replied "yes"; this was roughly the same proportion among each of the three sub-regions.

Q6. In which of the following counties do you work?

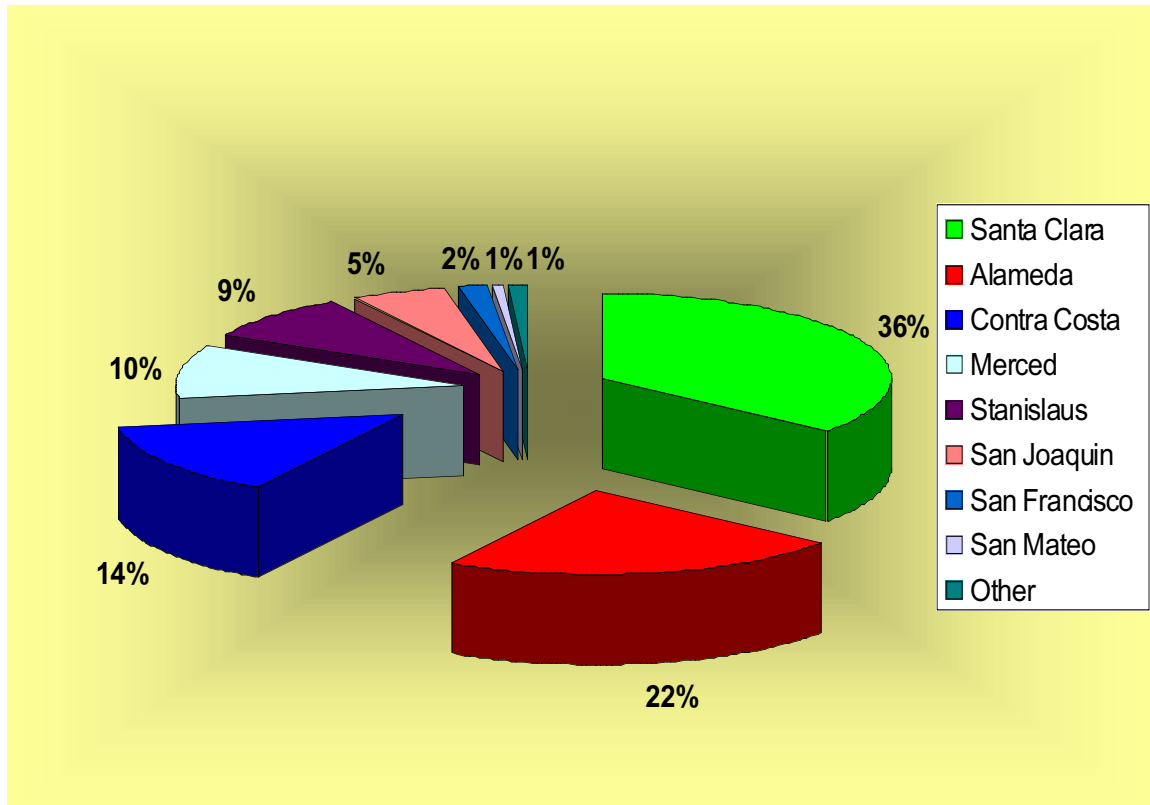
Base = Total respondents

Nearly three-quarters of all respondents said they work in either Santa Clara, Alameda or Contra Costa Counties. Over one-third alone said they work in Santa Clara County, while 22% work in Alameda County. Fourteen percent of respondents said they work in Contra Costa County.

A majority of respondents from Sub-region B work in Alameda or Contra Costa Counties (71%). Over one-third of respondents from Sub-region C said they work in Santa Clara and Alameda Counties combined.

Nearly one third of respondents who considered detached housing only also worked in Santa Clara County. Over half of respondents that were considering or had considered detached or attached housing also worked in Santa Clara County. One quarter of those interested in detached housing only in Sub-region C worked in Santa Clara County.

County of Employment



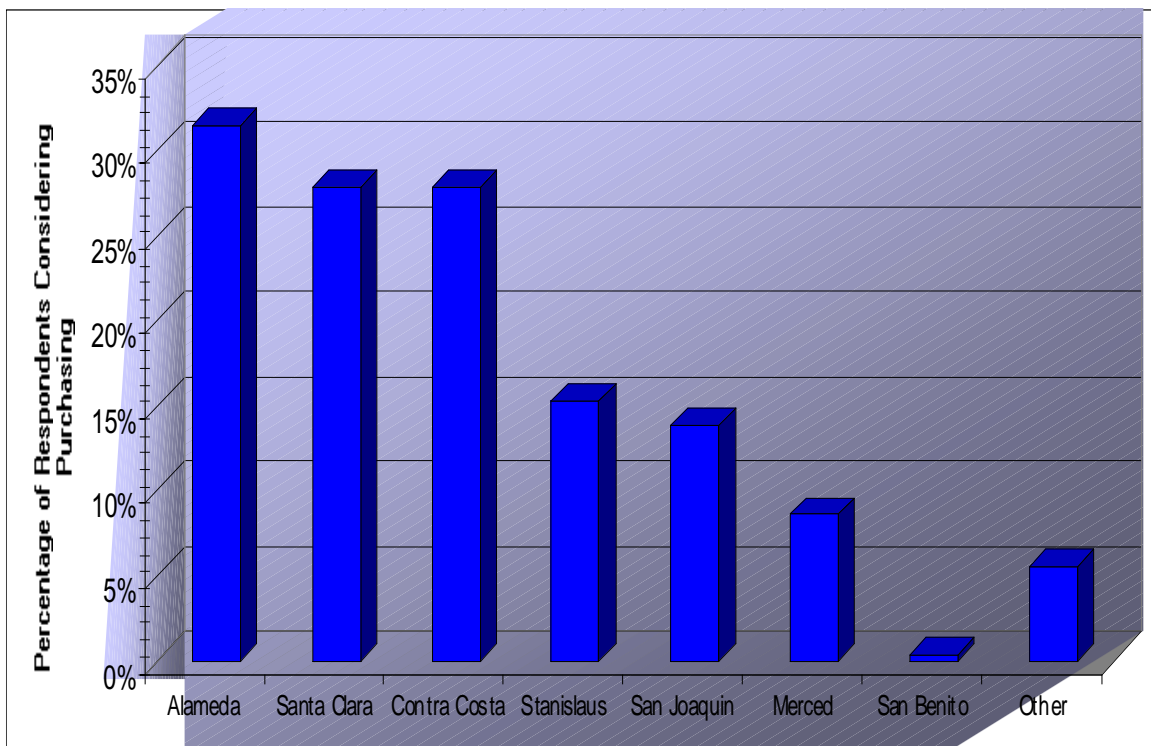
Q7. In which counties are you considering/did you consider for the purchase of your new home?

Base = Total respondents

Most respondents said they were considering or had considered purchasing a new home in Alameda County (32%). Almost 28% of respondents said they were considering or had considered Santa Clara County, as did the same number for Contra Costa County. Nearly 42% of respondents were considering or had considered purchasing a new home in Sub-region C.

Most respondents that were considering or had considered purchasing a new detached home, were looking/looked in Alameda County (30%). Almost half of those who were considering or had considered detached homes only, however, looked in Sub-region C. Less than 17% of respondents who were considering or who had considered purchasing a new detached or attached home, were looking/looked in Sub-region C. Instead, 46% of respondents who were considering or who had considered purchasing detached or attached housing, were looking/looked in Santa Clara County.

Housing Preference by County



Q8. Will this be/was this your first home purchase?

Base = Total respondents

Over half of all respondents said that this was *not* their first home purchase. In other words, most respondents were *not* first-time home buyers. This proportional relationship was similar throughout all three sub-regions.

Of those respondents that were considering or had considered detached homes only, 58% said this was *not* their first home purchase. Conversely, 61% of those respondents that said they were considering or had considered detached or attached housing, said this *was* their first home buying experience.

Nearly 57% of respondents earning \$50,000 or less said this *was, or had been*, their first home purchase. Sixty-five percent of respondents that earned \$100,000 or more said this *was not, nor had it been*, their first home purchase.

Almost 80% of those aged 18-30 said this *was, or had been*, their first home purchase. Over half of respondents age 31-40 said this *was not, nor had it been*, their first home purchase.

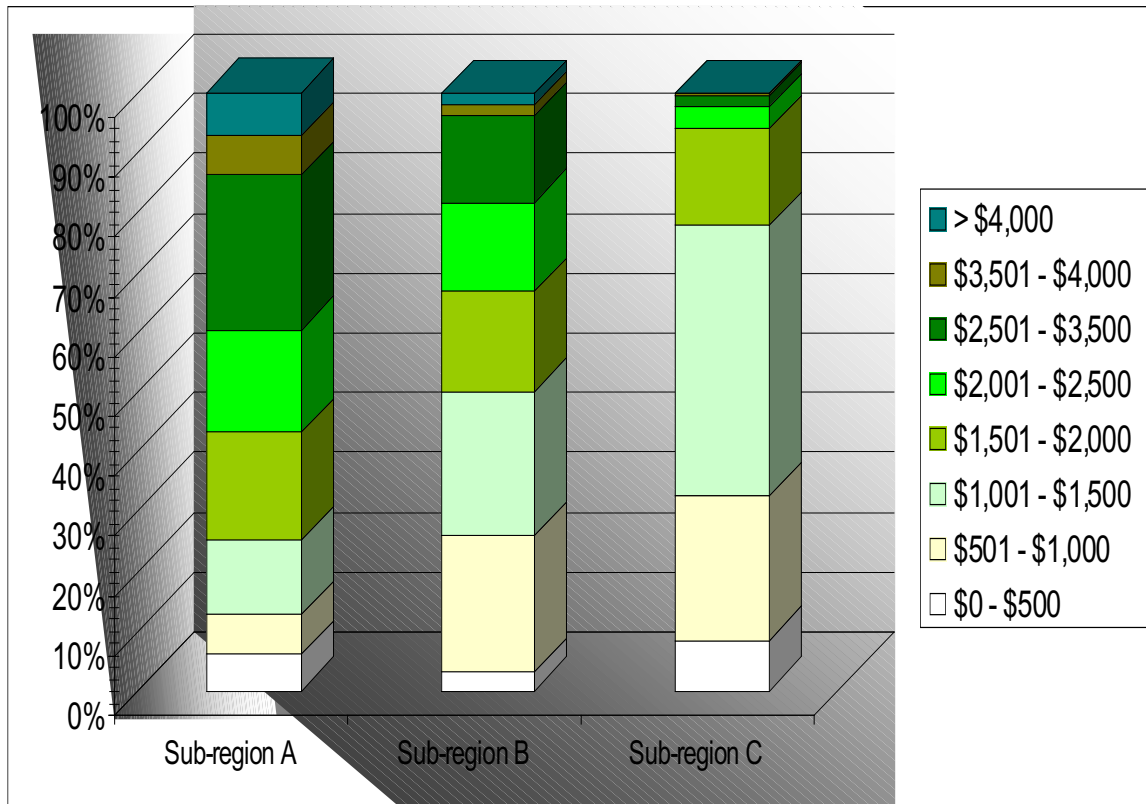
Q9. What is your monthly rent or mortgage?

Base = Total respondents

Thirty percent of respondents said their monthly rent/mortgage payment was between \$1,001 and \$1,500. The second most common response was between \$501 and \$1,000. The median rent/mortgage payment for all sub-regions was \$1,425 while the average payment was almost \$200 higher at \$1,618.

Over a quarter of those surveyed from Sub-region A indicated their rents/mortgages were between \$2,501 and \$3,500. Only 15% of respondents from Sub-region B said their rents/mortgages were this high, and only 2% from Sub-region C said their rents/mortgages were in this range. The median rent/mortgage payment in Sub-region A was \$2,202 which was \$702 higher than that for Sub-region B and \$1,008 higher than for Sub-region C.

Monthly Rents/Mortgage Payments by Sub-region



Q10. Do you own or rent your current home?

Base = Total respondents (Phone)

Most respondents (64%) said they rent their home. Over three-quarters of respondents from Sub-region A said they currently rent. Forty-two percent of respondents that were considering, or who had considered detached homes only said they own their current home. This was 19% higher than those who were considering or who had considered detached or attached housing.

Q11. Did you purchase your home as a new unit or as a re-sale?

Base = Currently own a home (Phone)

Two-thirds of respondents said they purchased their homes as resales.

Q12. Phone: Do you now rent an apartment, townhome, condo or single family detached home?

Mail: Did you purchase an attached home (townhome, condo) or a detached single family home?

Base = Currently rents a home

Eighty percent of respondents said they are either renting or own a detached home. All but one respondent from Sub-region C said they either rent or own a detached home.

Of those who were considering, or who had considered purchasing a detached home only, 88% said they were either renting or owned a detached home. Forty-five percent of those that said they are interested in detached and attached housing currently live in detached units.

Q13. In your new home search, are you/were you considering single family detached homes, attached homes such as townhomes and condos, or are you/were you considering both.

Base = Total respondents

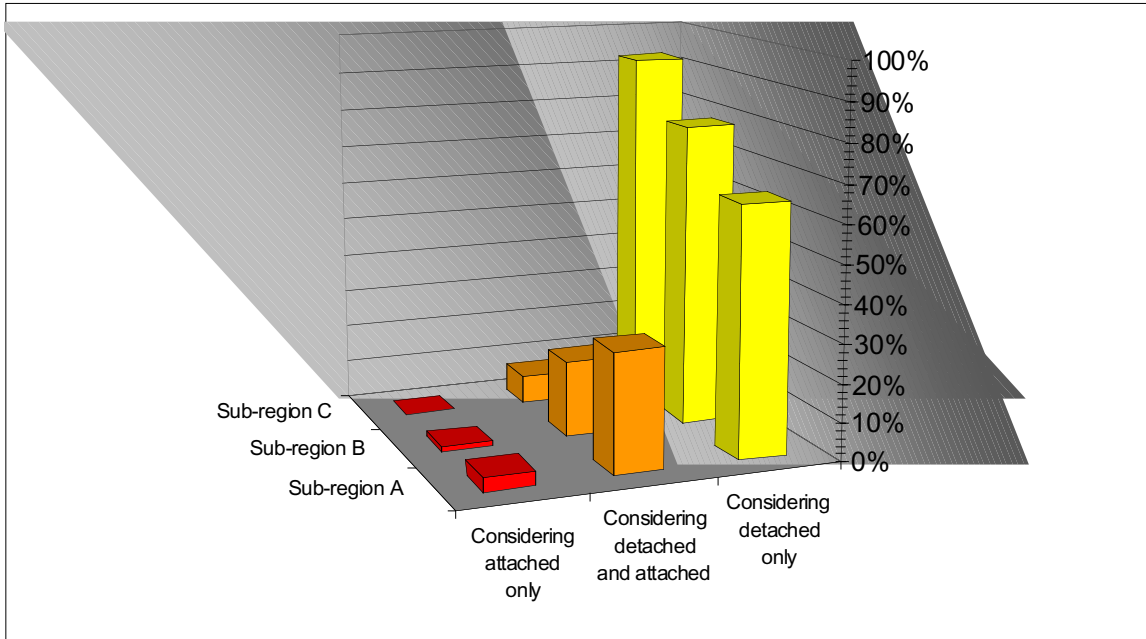
Over 80% of all respondents said they were considering detached homes only. However, respondents from Sub-region A were more likely to consider both detached and attached housing compared to the other two Sub-regions. Respondents from Sub-region C were the most interested in detached homes only.

Q14. On a scale from 1 to 7, with 1 being "mainly considering/considered an attached home" and 4 being "considering/considered attached or detached equally", and 7 being "mainly considering/considered a single family detached home." How would you rate your preference?

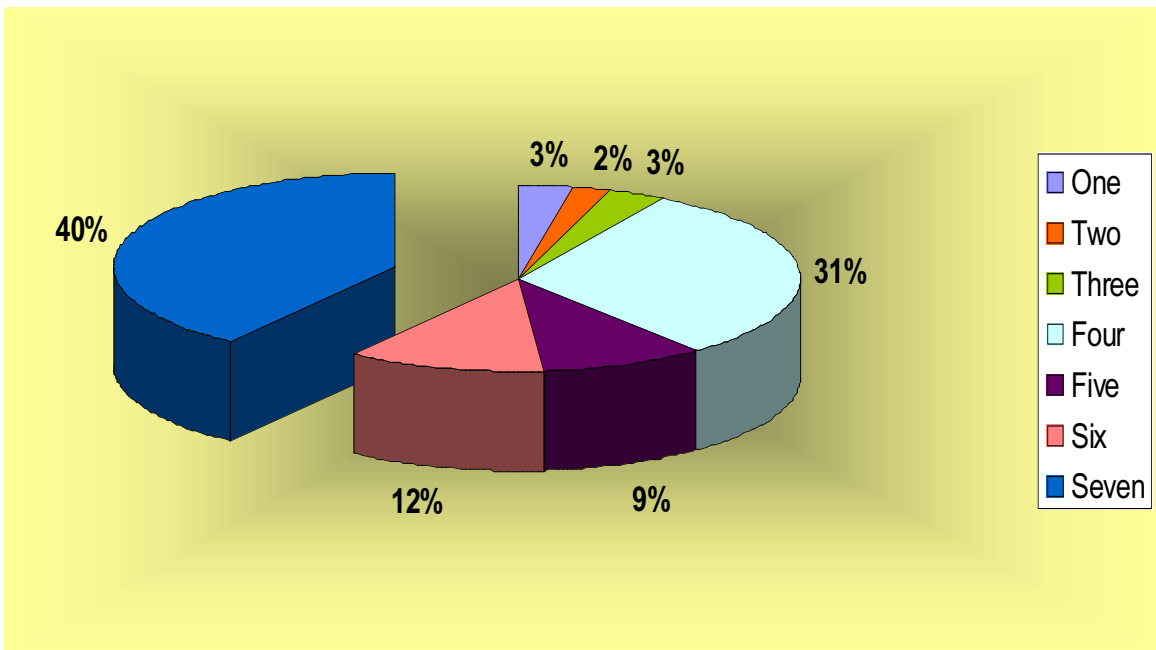
Base = Considering/considered both attached and detached homes

The most common response was a seven (7) followed by four (4) and then six (6). The mean ranking was 5.35 indicating that most were considering, or had considered, single family detached homes only.

Housing Preference by Sub-region



Ranked Housing Preference



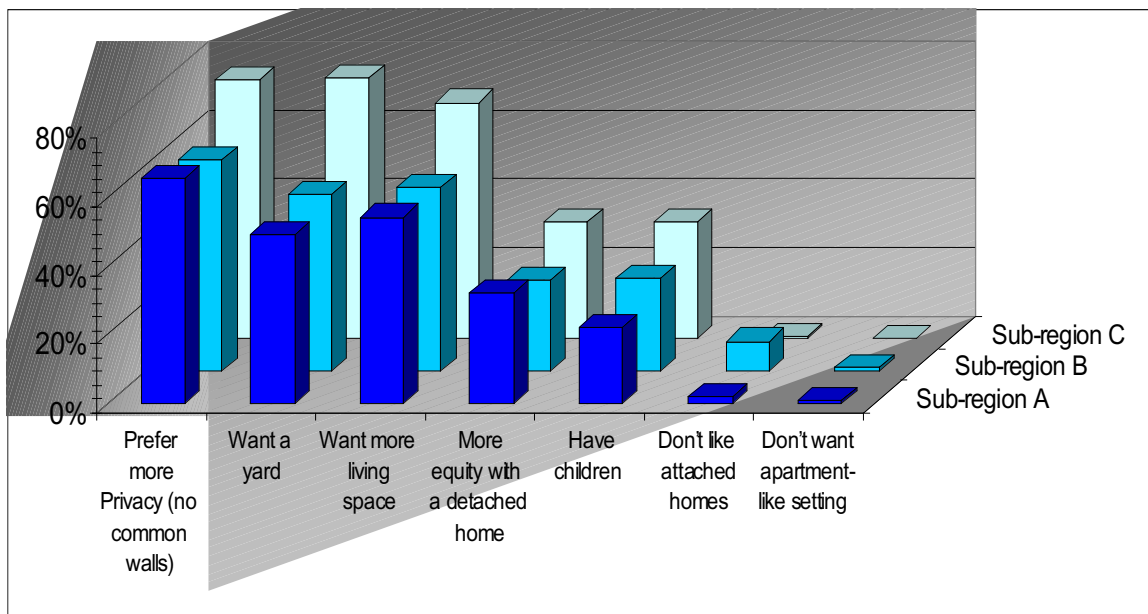
Q15. Reasons for consideration of detached homes only

Base = Considering/considered detached homes only

Most respondents said they considered detached homes primarily because they prefer more privacy; i.e., no common walls. Respondents also said that having a yard and relatively more living space were among their top considerations.

Over three-quarters of those surveyed from Sub-region C said that having a yard was an important consideration while less than half said so from Sub-region A. A number of respondents from Sub-region B said that they don't like attached homes, and that this is why they considered detached homes only.

Reasons for Considering Detached Homes Only



Q16. Would you be/have been more likely to consider an attached home if it were located very close to your workplace?

Base = Considering/considered both attached and detached or detached home only

Over three-quarters of all respondents said they would *not* have been more likely to consider an attached home if it were located very close to their workplace. Of the three sub-regions, respondents from Sub-region A showed the most willingness to consider

attached homes if they were closer to their jobs (33% "yes" 67% "no"). Respondents from Sub-region C were the most unwilling to consider attached homes if they were located close to employment centers---less than 12% said they would consider attached homes.

Q17. Reasons for consideration of attached homes only.

Base = Considering/considered attached home only

Respondents said that lower cost and the fact that they did not want a yard were the primary reasons they considered attached units only.

Q18. Phone: Do you intend to purchase your home within the same region in which you now rent or own a home?

Mail: Did you purchase your home within the same county in which you previously lived.

Base = Total respondents

About three-fifths of all respondents said they intend to purchase/have purchased their new home within the same region/county. Three-quarters of those polled in Sub-region A said they intend to purchase/have purchased their new home within the same region/county. Less than half of respondents from Sub-region C said they intend to buy/have bought within the same region/county.

Q19. What is your primary reason for staying in this region.

Base = Intention is/was to purchase home within same region

Nearly the same number of respondents said that the primary reason for staying in the region was because they liked the area and living near their jobs.

Almost three times as many respondents from Sub-region A said that proximity to jobs was the reason they intended to stay compared to those who gave the same answer in Sub-region C. Among those who were considering, or who had considered detached homes only, most said that they generally like the area and that this is what influenced

them to stay. The number one reason given by respondents who were considering, or who had considered detached or attached homes, was proximity to jobs.

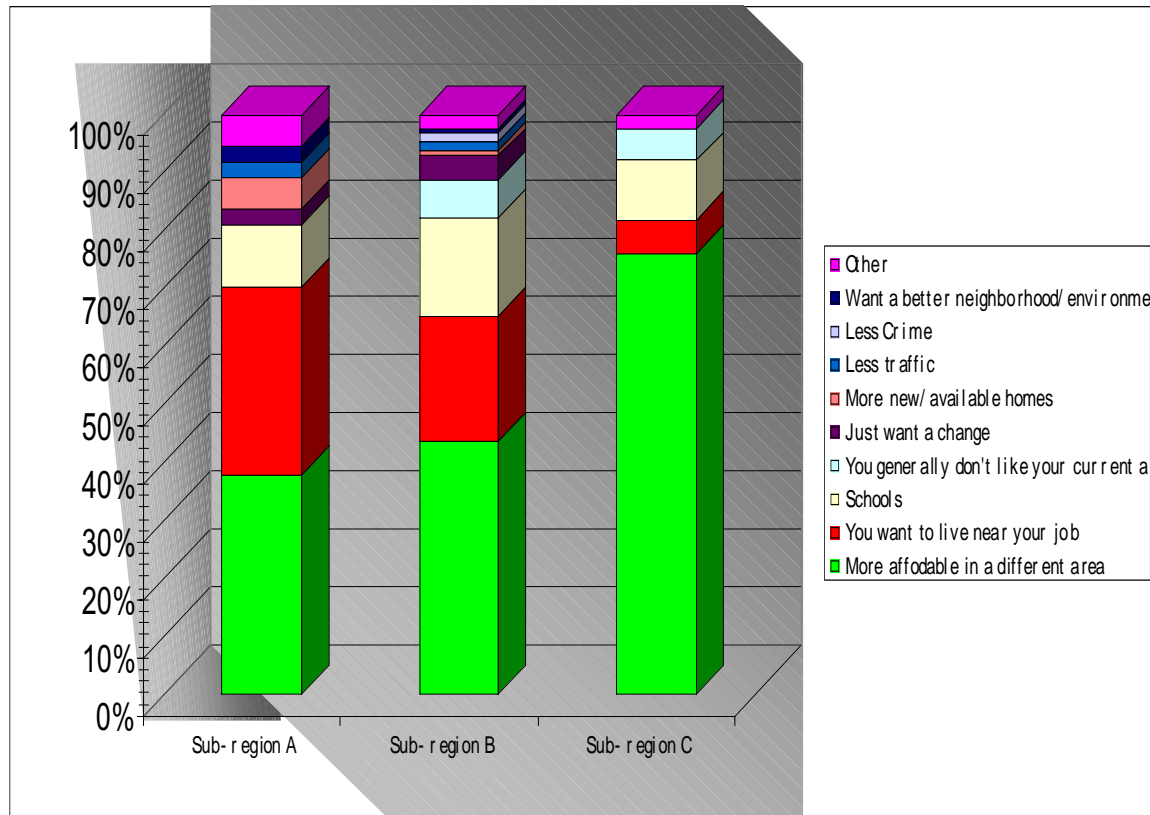
Q20. What is/was you primary reason for moving to a different area?

Base = Does/did not intend to purchase home within same region

Over three-and-a-half times as many respondents said that affordability was the primary reason for moving compared to those who said job/housing proximity was the main factor. Respondents ranked schools third behind wanting to live close to their jobs.

Over three-quarters of all respondents from Sub-region C said that affordability was the number one reason they moved. The primary reason given by Sub-region B respondents was affordability as well. Only 6% of Sub-region C respondents said the primary reason they moved was to be closer to their jobs. Thirty-two percent of respondents from Sub-region A said living near their jobs was the primary reason they moved.

Reasons for Moving to a Different Area

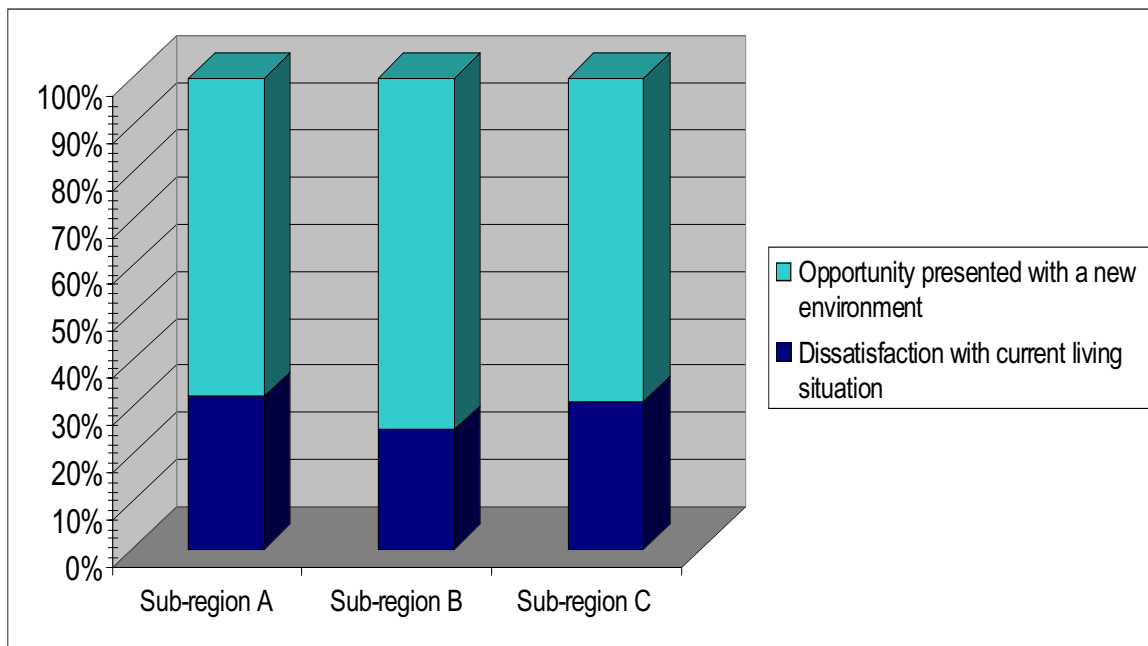


Q21. Is/was your move motivated more by your dissatisfaction with your living condition or by the opportunity presented in the new environment?

Base = Total respondents

Seventy-one percent of all respondents said that the opportunity presented in a new environment was the motivating factor that encouraged them to move. This proportion was slightly lower in Sub-regions A and C, and slightly higher in Sub-region B.

Motivation to Move



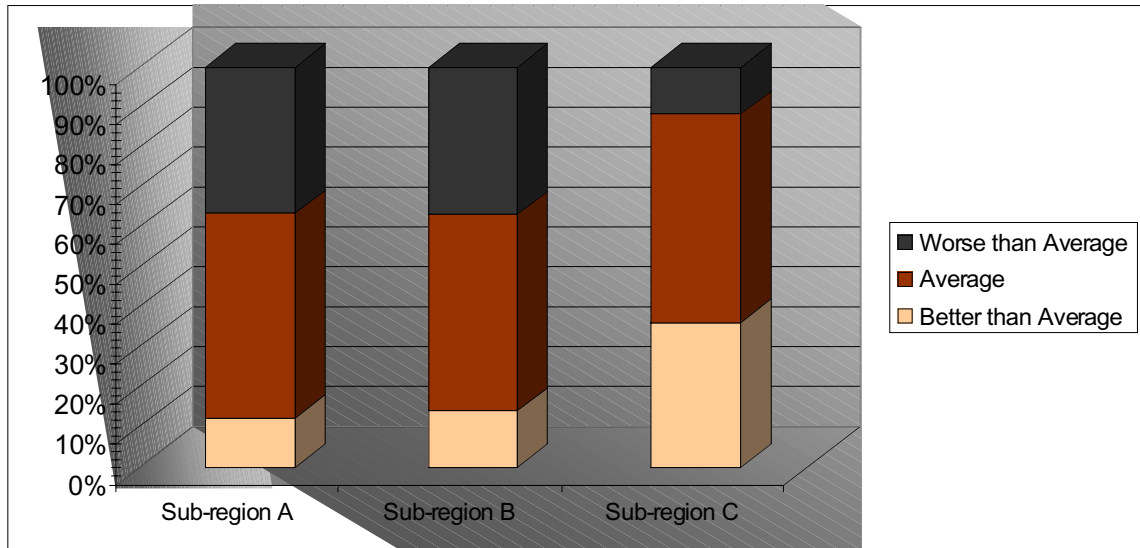
Q22. How would you rank traffic conditions in your area?

Base = Total respondents

Over 50% said that traffic conditions in their area were average. A little over 21% said that conditions were better than average while 28% said they were worse than average.

Only 12% of respondents from Sub-region A said traffic conditions were better than average. This was three times less than those from Sub-region C who answered similarly. In Sub-region B, 37% of respondents thought traffic conditions were worse than average while just less than half considered conditions average.

Traffic Conditions



Q23. How far would you be willing to drive one-way to and from work in order to minimize your housing costs?

Base = Total respondents

Nearly 23% of respondents said they would travel an additional 80 miles to and from work to achieve a 20% savings in their housing costs. Over 31% percent of respondents said they would be willing to drive an additional 40 miles to and from work each day in order to receive a 10% cost savings.

One-fifth of those surveyed from Sub-region C said they would endure a 160-mile round-trip commute to and from work each day so they could save 40% on their housing costs. Thirty-two percent of those from Sub-region C would drive an extra 80 miles each day to pay 20% less.

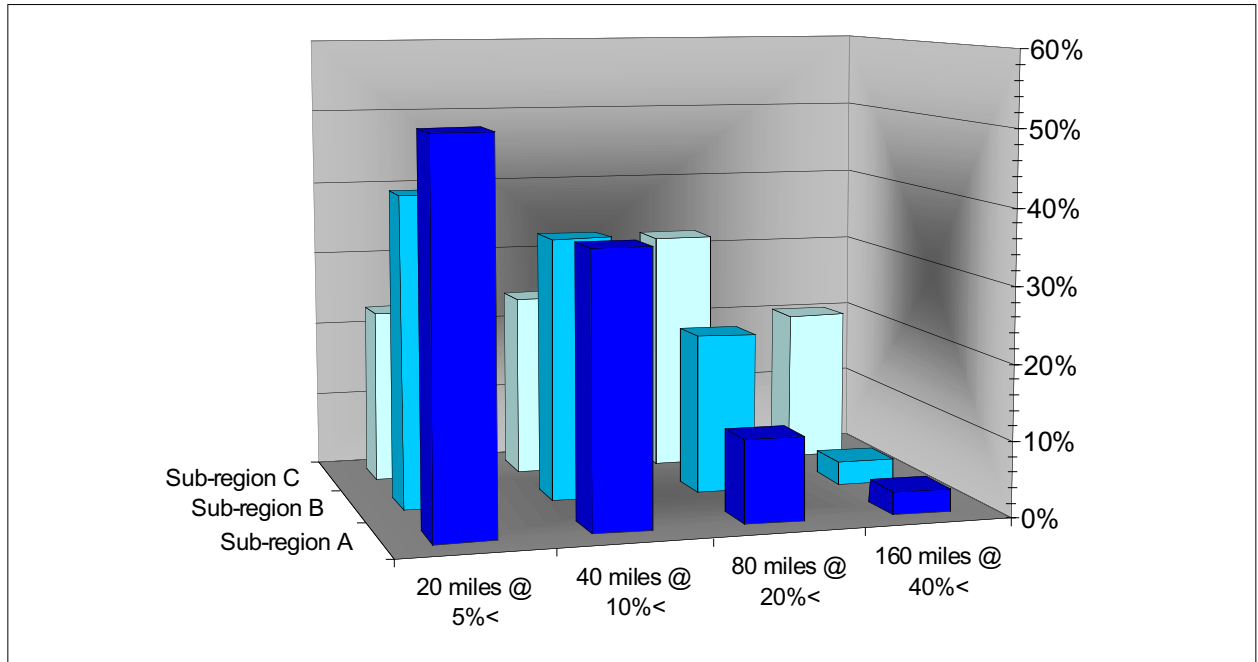
Q24. Degree of inclination to commute further for relatively higher density attached housing.

Base = Considering/considered both attached and detached or attached home only

Over 86% of respondents said they would be less inclined to commute further for relatively higher density attached housing. Respondents from Sub-region C were

relatively more willing to consider commuting for this type of housing---27.8% said they would be more inclined, but 72% still said they would be less inclined.

Travel Distance and Housing Costs



Q25. Would you consider/have considered purchasing new attached housing in an older urban area such as Oakland?

Base = Considering/considered detached home or more inclined to commute further for higher density attached housing

Four-fifths of all respondents said they would *not* consider/have *not* considered purchasing new attached housing in an older urban area such as Oakland. Among those who were considering, or who had considered detached or attached housing, 30% said they *were* considering/had considered an older urban area such as Oakland.

Q26. Would you consider/have considered purchasing new attached housing in an older urban area such as San Jose?

Base = Considering/considered detached home or more inclined to commute further for higher density attached housing

A majority of respondents said they *would not* consider/*had not* considered purchasing new attached housing in an older urban area such as San Jose. However, a majority of respondents that said they were considering detached or attached homes also said they were considering/considered purchasing new attached housing in an older area such as San Jose.

Q27. Why would you be/have been less inclined to commute further for relatively higher density attached housing?

Base = Less inclined to commute further for higher density attached housing

The most common response behind "commute time distance" and "need to be closer to job", was "density too high" (32%) followed by "little interest in attached homes" (26%).

Q28. Why would you be/have been more inclined to commute further for relatively higher density attached housing?

Base = More inclined to commute further for higher density attached housing

The primary reason respondents were more inclined to commute further for relatively higher density attached housing was affordability.

Q29. Would you be/have been more or less inclined to commute further for relatively lower density single family detached housing?

Base = Total respondents

Nearly 62% of all respondents said they would be more inclined to commute further for relatively lower density single family detached housing. Sixty-seven percent of respondents from Sub-region C said they would be more inclined to commute further.

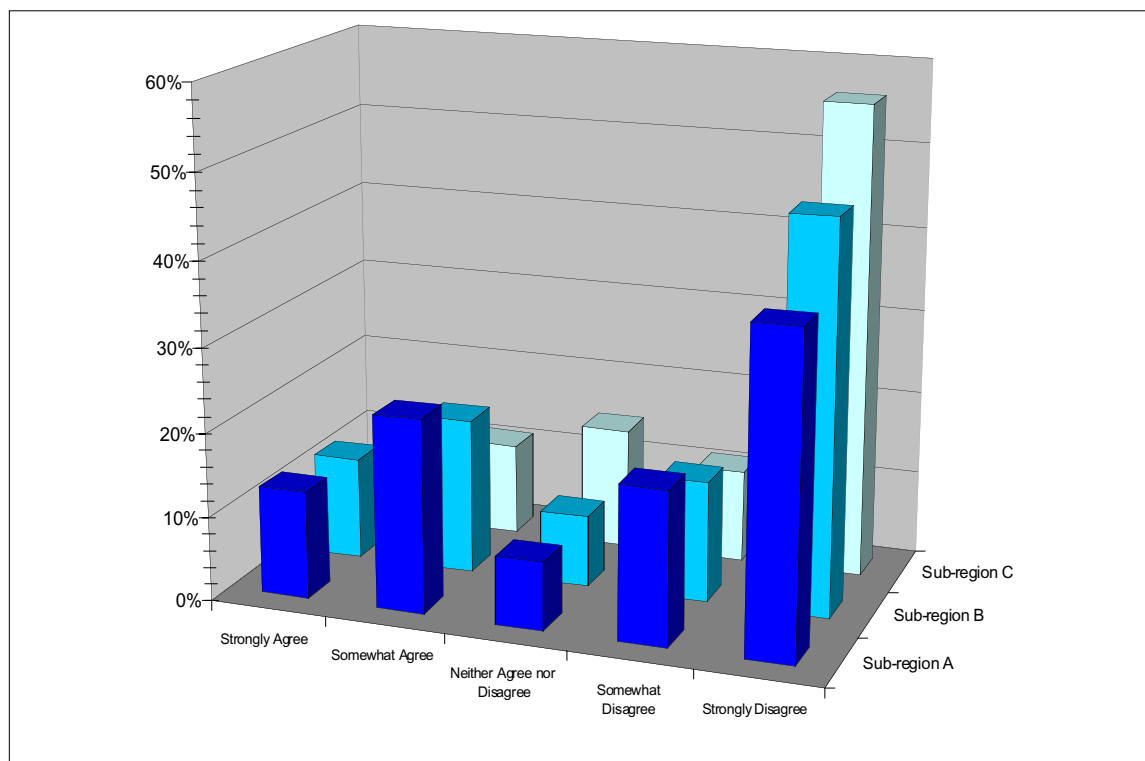
Q30. How much do you agree or disagree with the following statement (Scenario A): "I would pay less or equal to my current housing costs for higher density, attached housing near my job?"

Base = Total respondents

Sixty-two percent of all respondents said they disagree and 48% said they "strongly disagree" with the statement. Of those who were considering or who had considered a detached home only, 67% disagreed, 53% strongly disagreed. Among the respondents that indicated they were considering, or had considered detached or attached housing, 49% agreed with the statement while 42% disagreed with it.

A majority of respondents across all three sub-regions said they disagree with the statement. In Sub-region A, 56% said they disagree and 13% said they strongly agree. Over two-thirds of all respondents from Sub-region C said they disagree with the statement---the most of the three sub-regions.

Respondents' Disposition to Scenario "A"



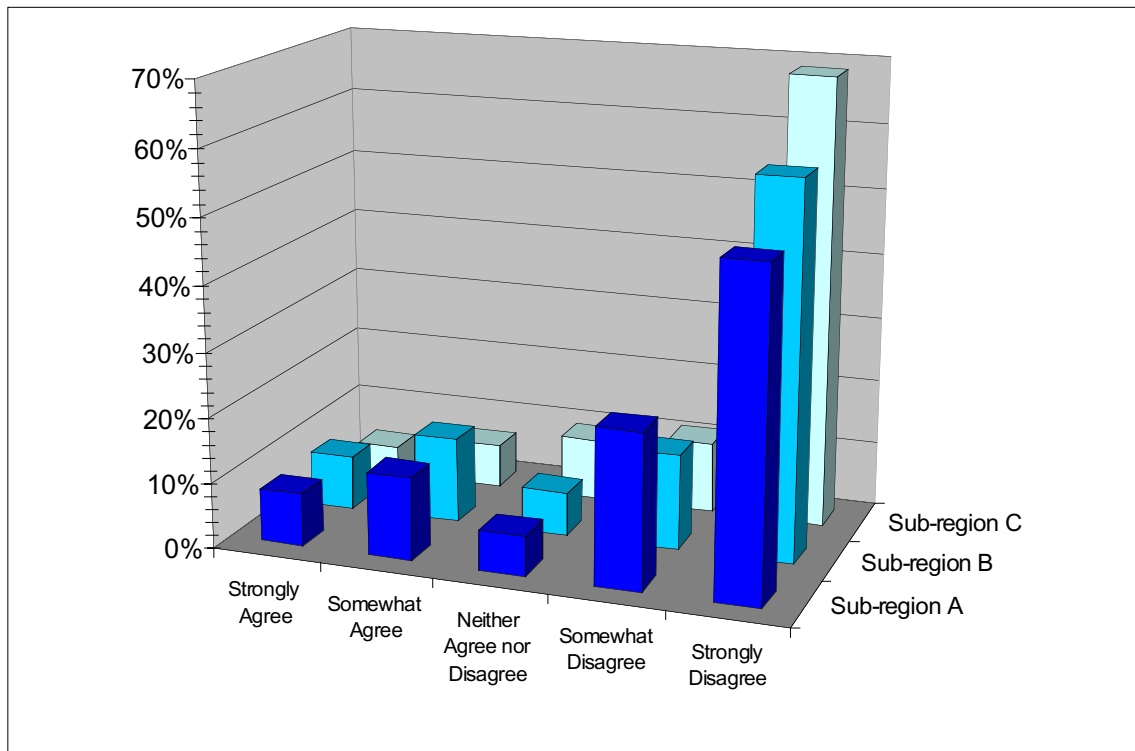
Q31. How much do you agree or disagree with the following statement (Scenario "B"): "I would pay more than my current housing costs for higher density, attached housing near my job?"

Base = Total respondents

Almost 60% of respondents strongly disagree with the statement. About half of the respondents from Sub-region A strongly disagree, while nearly 70% of those from Sub-region C registered similar sentiments.

Among those considering, or who had considered purchasing detached homes only, 79% disagreed with the statement. This was about 20% higher than those who were considering, or who had considered detached or attached housing.

Respondents' Disposition to Scenario "B"



Q32. How much do you agree or disagree with the following statement (Scenario "C"): "I would pay less or equal to my current housing costs for lower density, detached housing far from my job?"

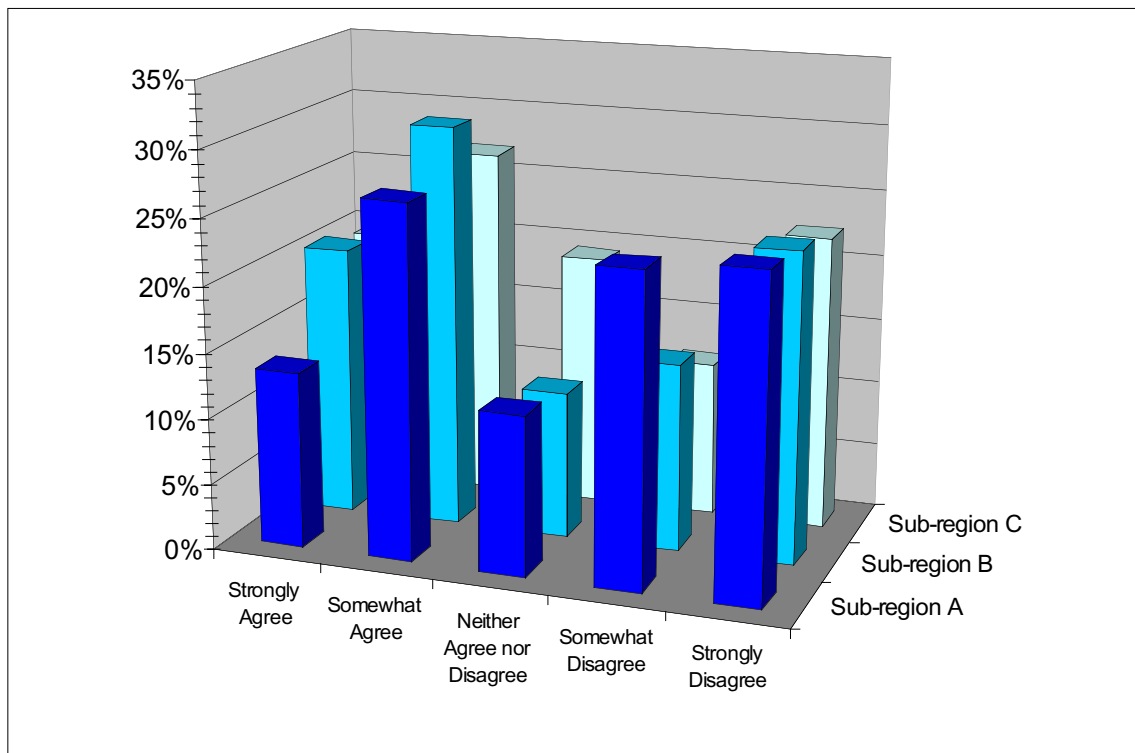
Base = Total respondents

Forty-seven percent of all respondents agreed with the statement. Of those that agreed, however, most said they somewhat agreed. Responses from individual sub-regions did not deviate much from the proportional relationship identified for all responses. The only noteworthy difference was the percentage of respondents from Sub-region A who

somewhat disagreed with the statement; 24% compared to 14% for Sub-region B and 12% for Sub-region C.

Just over half of those respondents who were considering, or had considered detached or attached housing agreed with the statement. Less than half of those considering, or who had considered detached homes only, however, said they agreed with the statement.

Respondents' Disposition to Scenario "C"



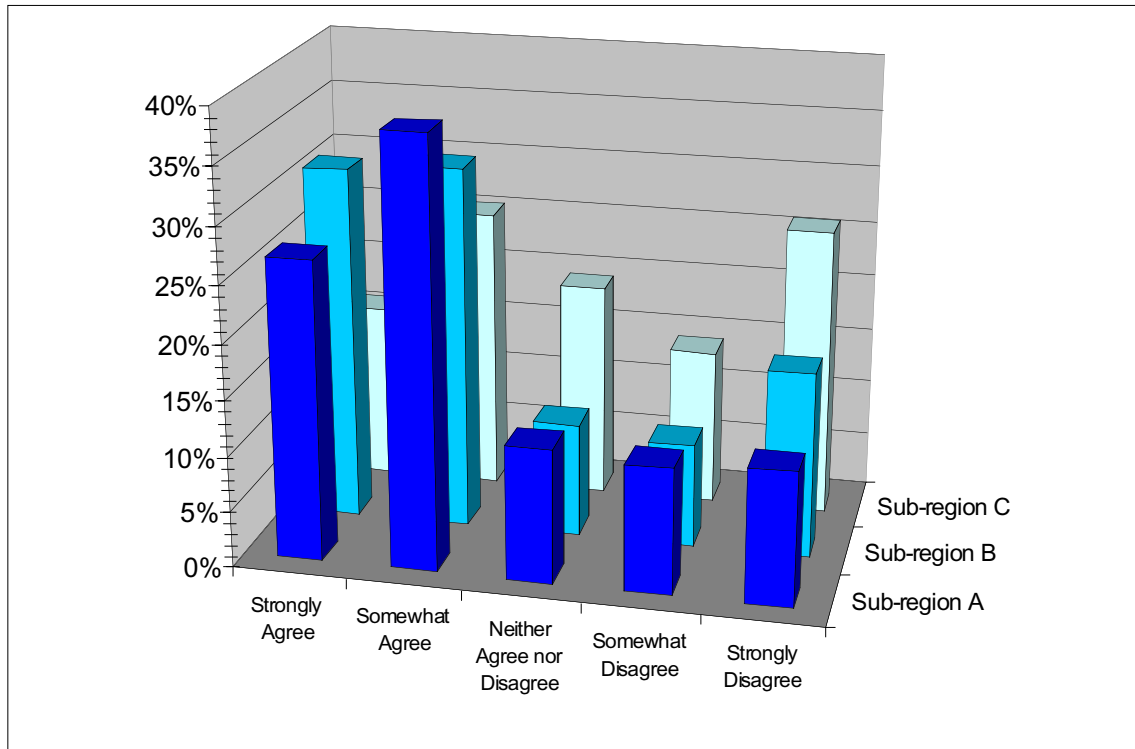
Q33. How much do you agree or disagree with the following statement (Scenario "D"): "I would pay more than my current housing costs for relatively lower density, detached housing near my job?"

Base = Total Respondents

Fifty-seven percent of respondents said they agree that they would pay more than their current housing costs for relatively lower density, detached housing near their jobs. Of this amount, 25% said they strongly agree with the statement.

Responses from each of the three sub-regions tended to mirror all responses as a whole except for those from Sub-region C. There, almost the same number of respondents agreed with the statement as did those that disagreed with it--40% and 41% respectively.

Respondents' Disposition to Scenario "D"



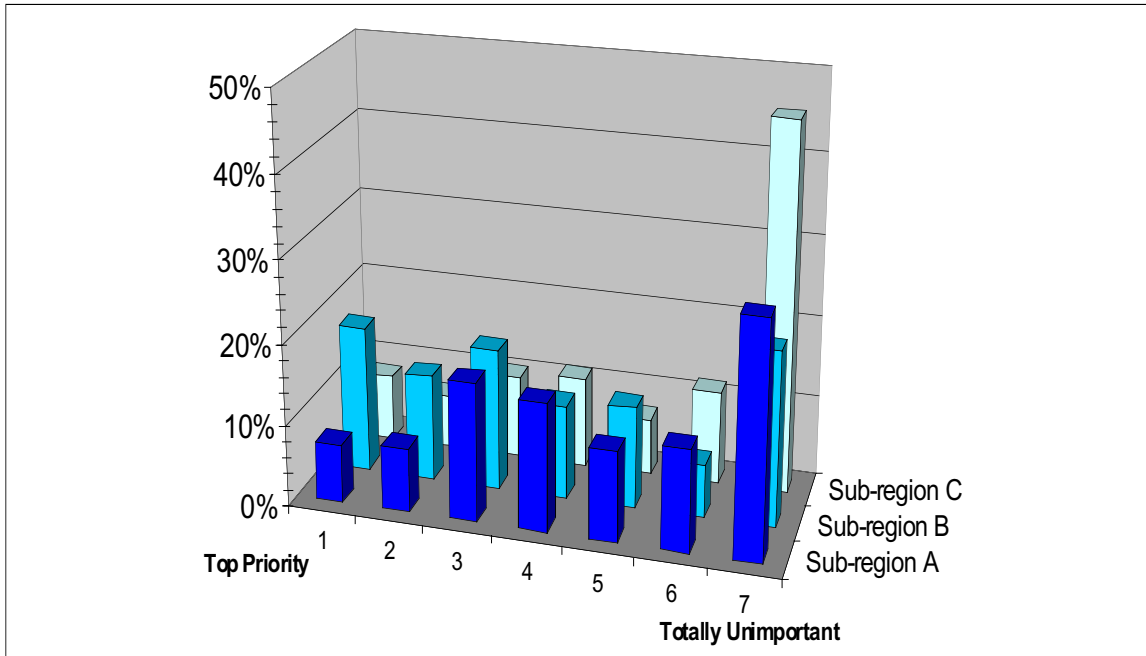
Q34. On a scale from 1 to 7 (1 being top priority and 7 being totally unimportant), how important is/was "accessibility to public transit" to your home purchase decision?

Base = Total respondents

Thirty-one percent of all respondents said that accessibility to public transit was *totally unimportant* to them in their home purchase decision. Twelve percent said it was a top priority. The average ranking for all responses was 4.51.

Among the individual sub-regions, 45% of respondents from Sub-region C said accessibility to public transit was totally important. This was the highest percentage for any one rank among all sub-regions. Conversely, 18% of respondents from Sub-region B indicated that public transit was a top priority for them in their home buying decision.

Importance of Public Transit to Home Buying Decision



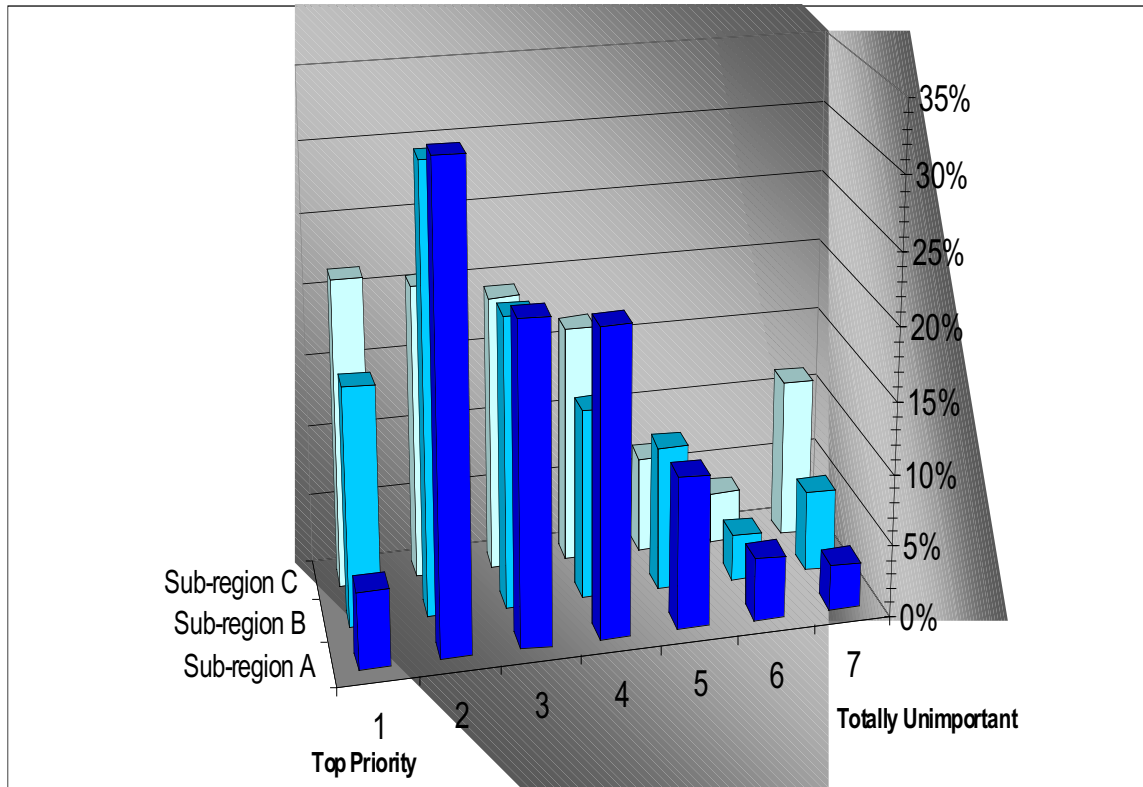
Q34A. On a scale from 1 to 7 (1 being top priority and 7 being totally unimportant), how important is/was "to live near uncongested roadways" to your home purchase decision?

Base = Total respondents (Mail)

Seventeen percent of all respondents said living near uncongested roadways was a top priority to them during their home purchasing experience. Over 63% ranked their responses as either a "1" (top priority), "2" or "3". Twenty percent of all respondents ranked this consideration as either a "7" (totally unimportant), "6" or "5". Less than 8% ranked it as "totally unimportant". The mean ranking for all responses was 3.16 which was lower than that for Sub-regions A and C, but higher than the average ranking for Sub-region B.

Respondents from Sub-region C were most sensitive to the consideration of congested roadways in their home buying decision---22% said it was a top priority. Less than 6% of respondents from Sub-region A, however, said that living near uncongested roadways was a top priority.

Importance of Uncongested Roadways to Home Buying Decision



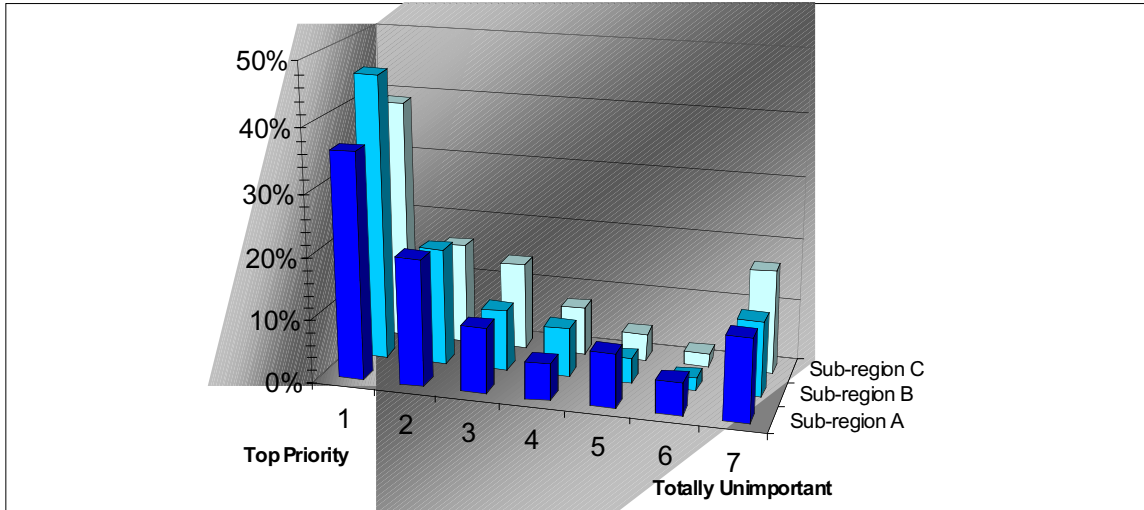
Q35. On a scale from 1 to 7 (1 being top priority and 7 being totally unimportant), how important is/was "quality of schools" to your home purchase decision?

Base = Total respondents

Most respondents indicated that quality schools was a top priority in their decision to buy a home. This sentiment was strongest in Sub-region B where 65% of respondents rated quality schools as either a "1" (top priority) or "2". The sub-region with the lowest percentage of respondents ranking schools as their top priority was Sub-region A at 36%. The average ranking for all responses was 2.8 while it was higher in Sub-regions A and C, and lower in Sub-region B.

Over 44 % of respondents who were considering, or had considered detached homes only, also considered "quality schools" a top priority. This percentage dropped to 31% for those respondents who were considering, or had considered detached or attached housing.

Importance of Quality Schools to Home Buying Decision



Q36. On a scale from 1 to 7 (1 being top priority and 7 being totally unimportant), how important is/was "proximity to shopping centers" to your home purchase decision?

Base = Total respondents

The average ranking for all respondents was 3.38. This was roughly the same in each of the three sub-regions. In general, most respondents ranked proximity to shopping centers as a "3" or "4".

Just over one-quarter of those respondents who were considering purchasing, or who had considered purchasing a detached housing only, also ranked proximity to shopping centers as a "3". Slightly fewer respondents who were considering, or who had considered detached or attached housing, gave shopping centers a similar score.

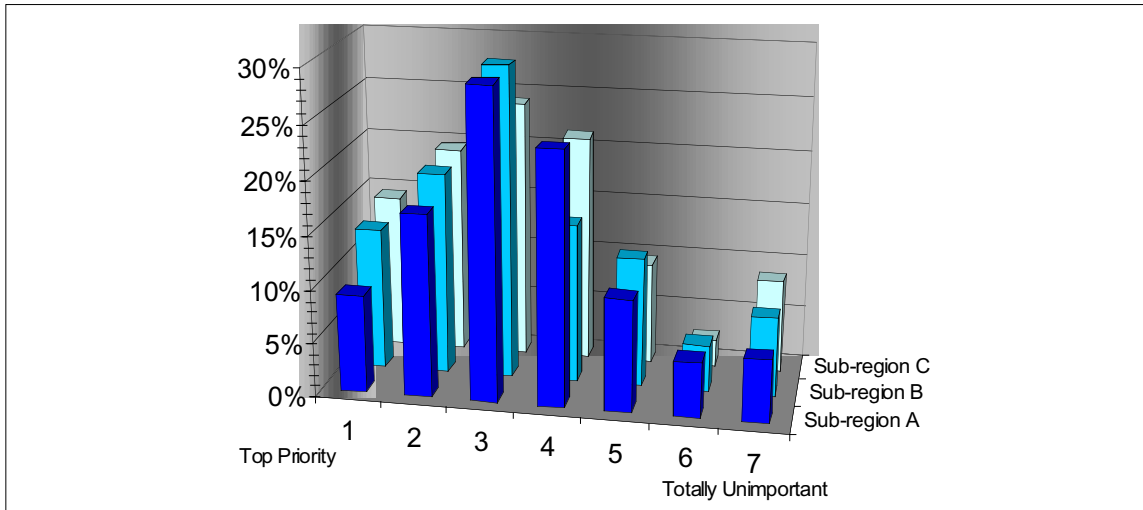
Q37. On a scale from 1 to 7 (1 being top priority and 7 being totally unimportant), how important is/was "desirability of floor plans" to your home purchase decision?

Base = Total Respondents

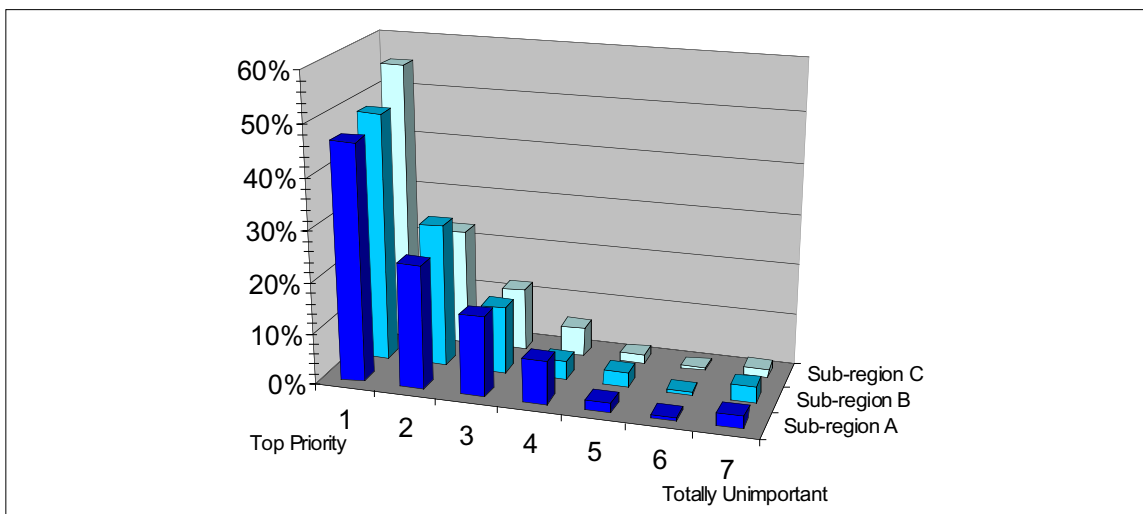
Over half of all respondents rated the desirability of floor plans as a top priority. Three-quarters of all respondents ranked floor plans as either a "1" (top priority) or "2". The

average score for all sub-regions was 1.33. Respondents in Sub-region A were relatively less sensitive to floor plan desirability than those from Sub-region C.

Importance of Nearby Shopping Centers to Home Buying Decision



Importance of Floor Plans to Home Buying Decision



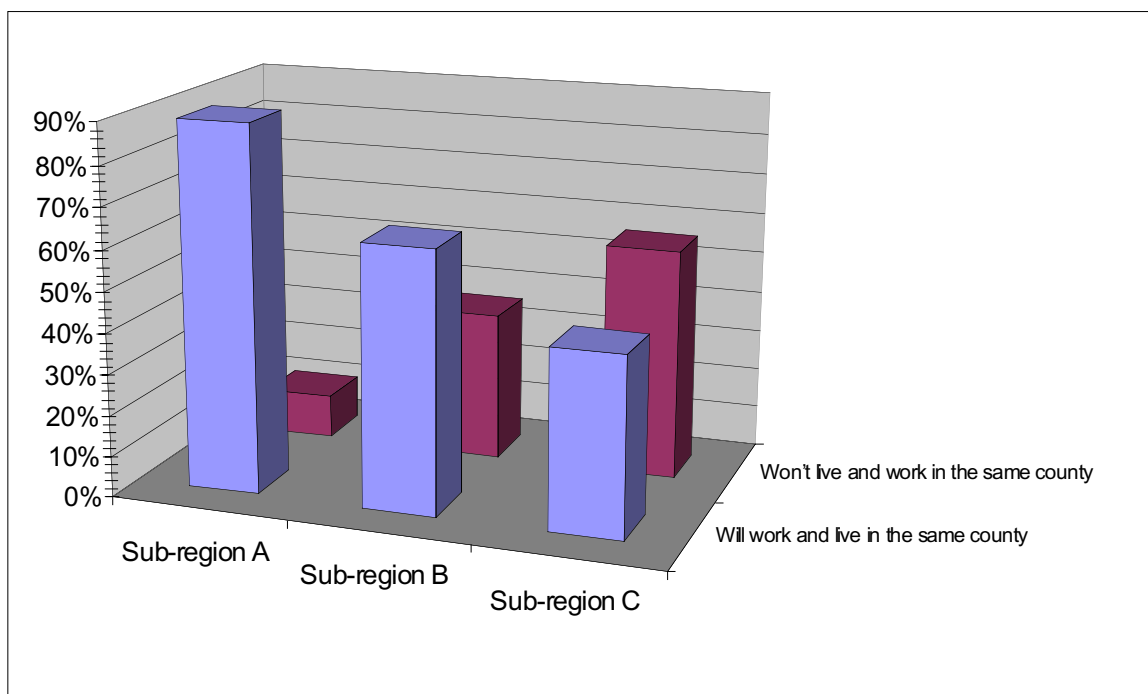
Respondents who were considering, or who had considered purchasing detached housing only were more inclined to consider floor plans in their decision to buy. Fifty-three percent said it was a top priority for them.

Q38. Will you/do you work and live in the same county?

Base = Total Respondents

Sixty-three percent of all respondents said they do/will work in the same county. A majority of those from Sub-region C, however, said they do not/will not work in the same county in which they live or will live. This contrasts greatly with 89% of respondents from Sub-region A who said they do/will work in the same county.

Working and Living in the Same County



Q39. Primary reason for working and living in then same county?

Base = Will Work or Does Work and Live in the Same Region

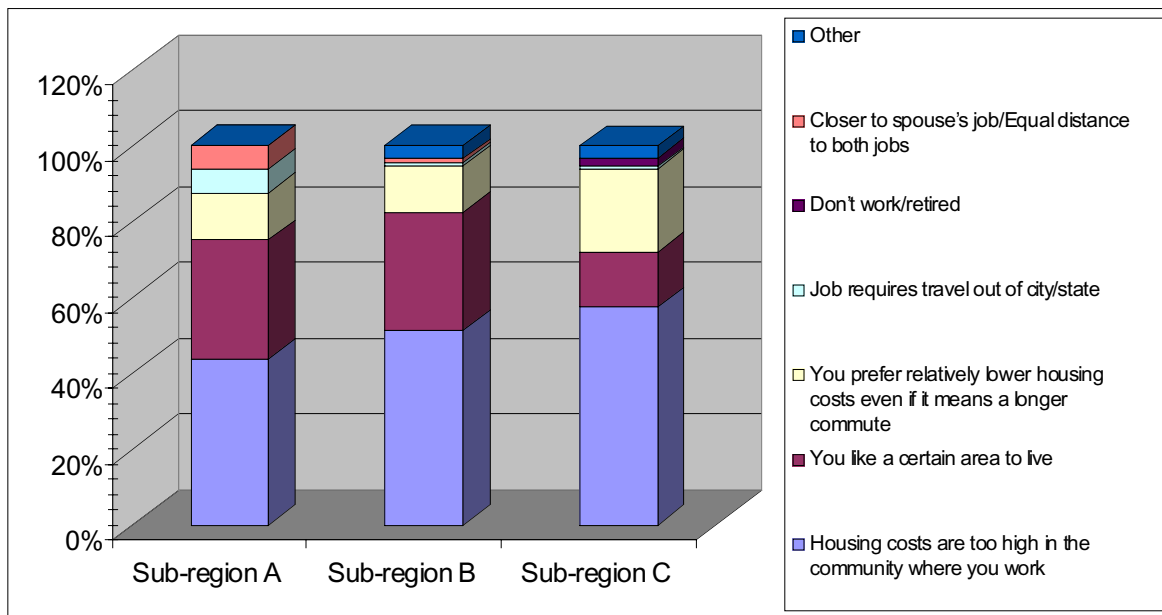
Most respondents (45%) said that the reason they live and work in the same county was to avoid a lengthy commute. Over half of those surveyed from Sub-region A said they lived and worked in the same county so they would not have a long commute.

Q40. Primary reason for not working and living in the same county.

Base = Will not or Does Not Work and Live in the Same Region

Nearly 54% of all respondents said the reason they don't live and work in the same county is because housing costs are too high in the community where they work. The second most common response was that they "liked a certain area" at 23%. Seventeen percent of respondents said they "prefer relatively lower housing costs even if it means a longer commute. This was the second most common response registered by those surveyed from Sub-region C.

Reasons Why Respondents Don't Live in the Communities Where They Work



Q41. How many cars are there in your household?

Base = Total Respondents

Over 83% of households have two or more cars. The average number for all households was 2.15. Respondents from Sub-region A reported having slightly fewer cars per household (2.03 on average), however, 62% said they have two cars in their household---the highest of the three sub-regions.

Q42. How many licensed drivers reside or will be residing at your home?

Base = Total Respondents

Seventy-three percent of all respondents said there will be two licensed drivers residing in their homes. This proportion was roughly the same in all three sub-regions.

Q43. What is, or will be, the primary means by which you get to and from work?

Base = Total Respondents

Over three-quarters of all respondents said that they drive alone, or will drive alone to and from work. Eleven percent use, or plan to use public transit. Nearly 83% of respondents from Sub-region A said they drive alone, this was notably higher than that registered in Sub-regions B and C.

Q44. If you drive to and from work, do you also use your automobile during the course of the business day for work purposes and/or to run errands?

Base = Drive Alone or In a Carpool to Get to and from Work

Two-thirds of all respondents said they use their cars during the course of the business day for work purposes and/or to run errands. This percentage was higher in Sub-region A and lower in Sub-region C.

Q45. Does this [having to use you car during the business day] affect your decision not to use public transportation?

Base = Use of Automobile During the Course of the Business day for work and/or to run errands

Three-fifths of all respondents said having to use their automobiles during the course of the business day for work purposes and to run errands did affect their decision not to use public transportation.

Q46. What are the primary reasons why you don't use public transit to get to and from work?

Base = Public transit not the primary means to get to and from work

Over half of those surveyed said that they don't use public transit because it is inconvenient. Additionally, 37% reported that they preferred the convenience of driving their own cars and this is why they don't use public transit. Only 14% said they don't use public transit because it is not available or accessible.

Q47. In general would you prefer to see new homes built near public transit?

Base = Total respondents

Almost three-quarters of respondents said they would like to see new homes built near public transit. Four out of every five respondents in Sub-region A said they would like to see new homes built near public transit, while this percentage was somewhat lower in Sub-region C at 63%.

Q48. Phone: If public transit were more accessible to new homes, how much impact would this have on your decision to purchase in these types of communities?

Mail: How much impact did accessibility to public transit have on your home purchase decision?

Base = Total respondents

Most respondents (62%) said accessibility to public transit would have "no impact" or "little impact" on their decision to purchase a home. This sentiment was strongest in Sub-region C where nearly half said it would have no impact. In Sub-region B, however, the opposite was true: 56% of respondents said that accessibility to public transit had "some impact" or a "strong impact" on their decision to purchase a home. Respondents that were considering, or who had considered detached or attached housing, were also more likely to say that accessibility to public transit had some impact on their decision to purchase.

Q49. Phone: If more new homes were built accessible to roadways with additional capacity, how much impact would this have on your decision to purchase in these types of communities?

Mail: How much impact did accessibility to roadways with additional capacity have on your home purchase decision?

Base = Total respondents

Over two-thirds of all respondents said that accessibility to roadways with additional capacity did/would have "some impact" or a "strong impact" on their decision to purchase. Respondents from Sub-region B were most sensitive to this variable with nearly 30% saying accessibility to roadways with additional capacity would have a strong impact on their decision to purchase.