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**Anchorage Housing  
Market Analysis  
Appendix B:  
Household Telephone  
Survey Results**

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# Executive Summary

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## Survey Purpose and Method

The telephone housing preference survey is one component of a larger study commissioned by the Municipality of Anchorage (MOA) to describe and project long-term demand for compact/urban housing within the Anchorage Bowl, Eagle River and Chugiak. The telephone survey was designed to collect a wide range of housing and housing-preference data from a statistically representative sample of residents in the target area. A companion survey was conducted online and is reported separately.

McDowell Group completed 814 telephone surveys within the MOA, including residents of the Anchorage Bowl, Eagle River and Chugiak. Surveys were fielded between January 5 and January 14, 2011.

## Satisfaction with Neighborhoods and Homes

**Most Anchorage and Eagle River-Chugiak residents are satisfied with their current housing.** Ninety-two percent say that overall they are either satisfied or very satisfied with their housing (38 percent indicated very satisfied). Satisfaction increases with household income. All of the respondents with household incomes above \$200,000 are satisfied with their current homes. However, even among households with income under \$20,000, 85 percent of respondents said they are generally satisfied. It is possible that some respondents benefit from subsidized housing.

**Anchorage and Eagle River-Chugiak residents are also reasonably satisfied with most neighborhood amenities.** Overall satisfaction with seven different neighborhood amenities ranges from 71 percent for “distance from bus stops” to 95 percent for “distance from grocery stores.” The area with the highest levels of dissatisfaction is “neighborhood safety.” The proportion of respondents saying they are either dissatisfied or very dissatisfied with neighborhood safety ranges from 7 percent in Southeast Anchorage to 24 percent in Northwest Anchorage (14 percent for all neighborhoods). “Distance from bus stops” and “distance from children’s playgrounds” have the next two highest levels of dissatisfaction overall (11 percent and 9 percent respectively).

**Satisfaction with property amenities, qualities associated with the home itself, is somewhat lower than with neighborhood amenities.** Overall satisfaction with seven different property amenities ranges from 86 percent for “number of bedrooms,” to 65 percent for “energy efficiency.” The proportion of respondents saying they are dissatisfied or very dissatisfied with their home’s energy efficiency ranges from 30 percent in Northeast Anchorage and Eagle River-Chugiak to 40 percent in Northwest Anchorage.

## Reasons for Choosing Neighborhoods and Homes

**When Anchorage and Eagle River-Chugiak residents chose their current neighborhoods, they did so on the basis of a complex interaction of factors.** Asked for the single most important reason, in their own words, for choosing their current neighborhood, 22 percent of respondents said “centrally located.” The table shows the ten highest-ranking neighborhood factors.

### Factors in Choosing Current Neighborhood

	% of Total
Centrally located	22%
Quiet/private	11
Distance from work	10
Established neighborhood	9
Distance from your children's schools	8
Neighborhood safety	8
Living on military base	5
The view	4
Moved in with boyfriend/spouse/family/friend	3
Close to relatives/friends	3

When asked what neighborhood amenity will be most important in their next neighborhood choice, the factors listed are similar, but "neighborhood safety" rises to the top, with 22 percent of respondents saying it will be the most important reason for choosing their next home.

Similarly, many property features come into play when residents chose their housing. Twenty-three percent say the single most important reason for choosing their current house had to do with design/attractiveness/layout/construction. The table shows the eleven highest ranking property factors.

### Factors in Choosing Current Property

	% of Total
Design qualities/attractiveness/layout/new home/built on own	23%
Square footage/size of home	20
Lot size	8
Backyard/gardens	6
Number of bedrooms	6
The view	5
Size of garage	4
Moved in with boyfriend/spouse/family/friend	4
Private lot/privacy	3
Secure building	2
Low maintenance	2

When asked what property amenity will be most important in their next home choice, the factors are similar to reasons why they chose their current housing. However, "energy efficiency" (7 percent) and "one level/accessibility" (6 percent) join the top ten.

## **Expectations about Moving**

**Three in ten respondents say they are “very likely” to move in the next five years, and another 25 percent say they are “likely” to move.** Of the respondents who are likely or very likely to move in the next five years, 25 percent are actively searching for a new home. Respondents living in multi-unit, duplex or attached homes are much more likely to move than those living in detached, single-family houses (approximately 75 percent versus 40 percent). Of those who are either likely or very likely to move within five years, a little more than half say they will remain in the Anchorage Bowl or Eagle River-Chugiak. Three in ten say they will leave Alaska.

**Anchorage and Eagle River-Chugiak residents heavily favor single-family homes (either attached or detached) over multi-unit complexes.** Three quarters of respondents say they will only consider single family structures for their next home.

**Eight of ten survey respondents say they are more likely to buy than rent their next residence.** Younger people, single-person households and lower-income households are most likely to rent. Forty percent of those renting now say they are most likely to rent their next home as well. More than 90 percent of current homeowners say they are most likely to buy their next home.

## **Attitudes toward Compact Housing**

**Approximately half of respondents said they would consider living in a smaller home in return for having a good design and a great neighborhood.** One- and two-person households, which tend to be older residents, are particularly interested in smaller homes. Of those who would consider a smaller home, two-thirds would only consider a single-family home (either detached or attached). Roughly one third would consider a home in a multi-unit complex. Three quarters of those who would consider a smaller home expect to purchase, rather than rent their next home. Approximately 60 percent of those who would consider living in a smaller home (and half of respondents overall) would prefer a smaller home with a shorter commute rather than a larger home with a longer commute.

Low-income households, households with no children, and those planning to move in the next five years are somewhat more amenable to smaller homes. Households with three or more children are less amenable. In other demographic categories, however, attitudes toward accepting a smaller home in return for certain amenities tend to be evenly split.

**Approximately half of respondents say they would choose a larger home with a longer commute, and half say they would choose a smaller home and a shorter commute.** This bifurcation on home size suggests that attitudes about space versus home and neighborhood quality may be significantly influenced by factors not addressed in this survey, such as people’s self-image or expectations.

## **“Highly Likely” Candidates for Smaller Homes**

One way to think about the respondents who are most likely to consider smaller homes in the future is to group together those who stated they:

- Are likely to consider a smaller home in the future and
- Prefer a smaller home and shorter commute rather than a larger home and longer commute and
- Prefer being close to restaurants, stores and entertainment to having a large yard.

Approximately 18 percent (140 individuals) of all respondents answered all three questions in this manner. This group is somewhat older (median age 48) and, partly as a result, less likely to have children living in their households.

In other demographics, the “highly likely” candidates for compact housing do not differ significantly from respondents as a whole. They are also similar in regard to the square footage and number of bedrooms in their current home, current housing structure (for example, detached single family, multi-unit apartment), current housing tenure (rent or own), household income, ethnicity, and level of satisfaction with current housing.

The highly likely candidates, in most respects, value neighborhood amenities similarly to respondents as a whole. However, they are somewhat more likely to consider proximity to trails and open space, and also to grocery stores as important, and they show slightly less interest in play space for children. They also do not place as high a value on a large yard or the need for storage space for their recreational equipment.



# Purpose and Methodology

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## Purpose

The telephone housing preference survey is one component of a larger study commissioned by the Municipality of Anchorage (MOA) to describe and project long-term demand for compact/urban housing within the Anchorage Bowl and Eagle River-Chugiak. The telephone survey was designed to collect a wide range of housing and housing-preference data from a statistically representative sample of residents in the target area.

## Methodology

Design of the telephone survey drew on research that included a literature review focusing on the correlation between household characteristics and housing preferences, case studies of municipal housing development projects, migration-flow and other population data, and 26 executive interviews with key stakeholders. An Advisory Committee made up of MOA staff and experts in local housing and real estate development provided additional input during the survey design phase.

McDowell Group completed 814 surveys with residents of the MOA, including residents of the Anchorage Bowl and Eagle River-Chugiak. This sample size produces a maximum sampling error of +/- 3.5 percent at the 95 percent confidence level for the sample as a whole. Surveys were fielded between January 5 and January 14, 2011. Respondents included 87 households with a member of the active military. Table 1 shows the distribution of respondents by subarea of Anchorage.

The survey sample is demographically similar to the Anchorage and Eagle River-Chugiak population with a few exceptions. The most significant difference is that respondents were older, on average, than the population as a whole. This is often the case with telephone surveys. Survey results were statistically weighted to adjust for this under representation of younger households.

Respondents also were more likely to be female than the population as a whole. Females tended to place somewhat more importance on school and child amenities than male respondents, but their answers are similar in most other respects. The study team determined that weighting the data by gender would not improve the overall accuracy of the results and could detract from it.

Other demographic differences were relatively minor and would not be expected to affect the representativeness of the survey results. For example, responses for Alaska Natives did not differ from those for non-Natives except in ways that are most likely a function of income, not ethnicity. Some differences were noted between military and non-military respondents. These are noted in the report.

A copy of the telephone survey instrument is found in Appendix C.

# Current Residence

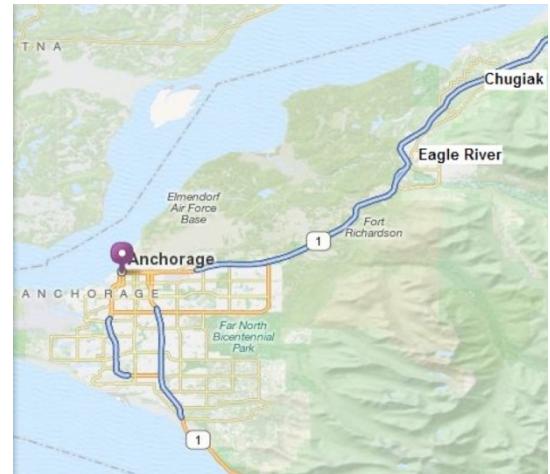
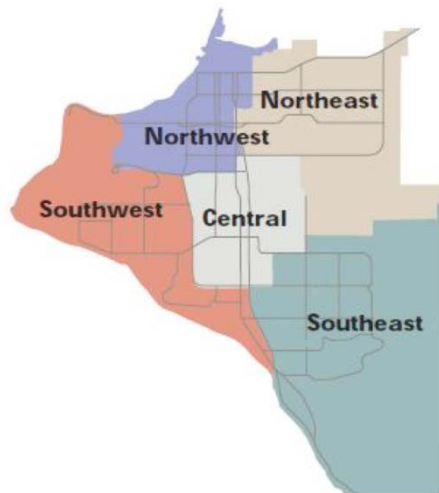
## Current Location of Respondents

To determine whether respondents are residents of the Municipality of Anchorage (the target population) respondents were asked for their current zip code. The table shows the distribution of respondents by zip code and the approximate subarea of Anchorage (Northwest, Northeast, Central, Southwest and Southeast Anchorage) and Eagle River-Chugiak represented by each zip code. These Anchorage subareas are the ones used in the *Anchorage 2020 Comprehensive Plan* (see subarea map on next page).

**Table 1. Current Residence Zip Code (self-identified)**

	% of Respondents	Number of Respondents	2000 Census
<b>Northwest Anchorage</b>		<b>90</b>	
99501	4%		6%
99517	7		6
99519	<1		<1
<b>Northeast Anchorage</b>		<b>141</b>	
99504	14%		14%
99505	2		2
99506	4		3
<b>Central Anchorage</b>		<b>162</b>	
99503	7%		5%
99508	11		13
99518	3		4
<b>Southwest Anchorage</b>		<b>204</b>	
99502	8%		7%
99511	<1		<1
99515	8		8
<b>Southeast Anchorage</b>		<b>127</b>	
99507	13%		11%
99516	10		8
99540	<1		<1
<b>Eagle River-Chugiak</b>		<b>71</b>	
99567	2%		3%
99577	6		9
<b>Zip Code Unknown</b>		<b>19</b>	
<b>Total Respondents</b>		<b>814</b>	

Note: Due to rounding, column may not add



## Length of Residency in Anchorage and Eagle River-Chugiak

Respondents have resided in Anchorage or Eagle River-Chugiak for an average of almost 20 years. Median residency is 18 years. Three quarters of respondents have lived in Anchorage or Eagle River-Chugiak for six years or more.

**Table 2. How many years have you lived in the Anchorage Bowl, Eagle River or Chugiak Area?**

# of years	% of Respondents
<1 year	4%
1 – 5	19
6 – 10	15
11 – 20	20
21 – 30	18
31 – 40	15
41+	10
Don't know	<1
<b>Average number of years</b>	<b>19.8 years</b>

Note: Due to rounding, column may not add to 100 percent.

## Length of Residency in Current Home

The average length of residency in the current home is 8.6 years, but the median residency is less than 5 years. One out of ten households (11 percent) have lived in their current homes for less than a year. The same proportion has lived in their current homes for more than 20 years.

**Table 3. How many years have you lived in your current home?**

# of years	% of Respondents
<1 year	11%
1 – 5	43
6 – 10	20
11 – 20	15
21 – 30	6
31+	5
Don't know	<1
<b>Average</b>	<b>8.6 years</b>

Note: Due to rounding, column may not add to 100 percent.

## Home Ownership

Two out of three respondents (68 percent) own their current homes. This is somewhat higher than the American Community Survey (ACS) estimate of 62 percent for 2009.

**Table 4. Do you rent or own your current home?**

	% of Respondents	ACS Estimate (2009)
Own	68%	62%
Rent	32	38
Living with friends or family	<1	
Don't know	<1	

Source: American Community Survey (ACS) is an estimate based on 2009 survey data collected by the U.S. Census Bureau

## Housing Structure

Six out of ten respondents (59 percent) own a detached single family home. Two out of ten (19 percent) live in an attached home, such as a row house, town house, zero lot line or duplex. Approximately the same proportion (18 percent) live in a multi-unit complex.

The distribution of housing structures in the survey sample differs somewhat from that in the U.S. Census Bureau ACS. Percentages from the 2009 ACS are shown in the right hand column of Table 5, below. When extrapolating the views of residents by structure-type presented in the survey to the population as a whole, the proportions in the ACS estimates should be used to represent the overall population.

**Table 5. Of the following, which type of housing do you currently live in?**

	% of Respondents	2009 ACS Estimates
A stand-alone, single family house on its own lot	59%	47%
A multi-unit apartment or condominium complex	18	27
A single family attached home such as a row house, townhouse, or zero lot line	10	14
A duplex	9	5
A mobile home in a mobile home park	3	6
Other	1	1

Respondents who live in a multi-unit complex are about evenly distributed between buildings with less than 5 units, 6 to 10 units, and 11 or more units.

**Table 6. How many units are in your building?**

*(Base: Those who live in a multi-unit apartment or condominium complex)*

n=142	% of Respondents
Less than 5	31%
6 – 10	31
11 or more	26
Don't know/Refused	12
<b>Average</b>	<b>16.5 units</b>

## Home Size

The average square footage of respondent homes is 2,000 square feet.

**Table 7. Approximately how many square feet is your current home?**

	% of Respondents
<1,500	27%
1,500 – 2,000	21
2,001 – 2,500	13
2,501+	15
Don't know	24
Refused	<1
<b>Average square footage</b>	<b>2,000 sq. feet</b>

Note: Due to rounding, column may not add to 100 percent.

Residents of Southeast Anchorage have the largest homes, averaging 2,470 square feet. Residents of Central Anchorage have the smallest, averaging 1,690. Of the 119 respondents with homes of more than 2,500 square feet, half live in Southeast Anchorage.

## Number of Bedrooms

The average number of bedrooms for all respondents is 3.1.

**Table 8. How many bedrooms do you have in your home?**

	% of Respondents
1	4%
2	23
3	41
4	24
5+	8
Refused	<1
<b>Average number of bedrooms</b>	<b>3.1 rooms</b>

Note: Due to rounding, column may not add to 100 percent.

Households with incomes less than \$40,000 average 2.4 bedrooms. Those with incomes of more than \$150,000 average four bedrooms. Between 42 and 48 percent of all respondents in Eagle River-Chugiak, Southwest Anchorage, or Southeast Anchorage have four or more bedrooms, versus 19 percent to 29 percent for the other three subareas of Anchorage.

## Garages

Two out of three households (66 percent) have a garage.

**Table 9. Does your home include a garage?**

	% of Respondents
Yes	66%
No	34

Approximately 80 percent of homes in Eagle River-Chugiak, Southwest Anchorage, or Southeast Anchorage include a garage versus two-thirds or less in Northwest, Northeast or Central Anchorage. Approximately 80 percent of homeowners have a garage, versus 40 percent of renters. Most garages are built for two cars.

**Table 10. How many cars is your garage built for?**  
*(Base: Those whose home includes a garage)*

	% of Respondents
1	28%
2	57
3	12
4	1
5+	1
Don't know	1
Refused	1
<b>Average</b>	<b>1.9 car spaces</b>

Note: Due to rounding, column may not add to 100 percent.

# Level of Satisfaction with Current Neighborhood and Housing Amenities

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## Overall Satisfaction with Current Housing

Overall satisfaction with current housing is high, with 92 percent of respondents saying they are either satisfied or very satisfied.

**Table 11. Overall, are you very satisfied, satisfied, dissatisfied or very dissatisfied with your current housing?**

	% of Respondents
Very satisfied	38%
Satisfied	54
Dissatisfied	6
Very dissatisfied	1
Don't know	<1
Refused	<1

Approximately 95 percent of those paying more than \$1,000 per month say they are satisfied, versus 80 percent of households paying less than \$1,000 per month. A full 100 percent of households earning more than \$200,000 per year are satisfied with their current housing.

Residents of Central Anchorage are slightly less satisfied (88 percent satisfied) than residents of other areas (94 percent). Higher satisfaction correlates with higher income and higher monthly payments.

Of those who say they are dissatisfied or very dissatisfied, one third say their highest priority for their next home is more space. Slightly fewer (30 percent) say their highest priority is an attractive design or better home layout. These were by far the two most common priorities for dissatisfied respondents.

Eighty-six percent of those who are currently dissatisfied say they are likely to move within 5 years, and half say they are actively looking.



## Satisfaction with Current Neighborhood and Property Amenities

Most respondents say they are either satisfied or very satisfied with their current neighborhood amenities (Table 13). The area of greatest dissatisfaction is neighborhood safety, with 14 percent of respondents either dissatisfied or very dissatisfied. Dissatisfaction with the level of some amenities varies by area of residence, as shown in Table 14 below.

**Table 12. Level of Satisfaction with Current Neighborhood Amenities.**

	Very Satisfied	Satisfied	Total Satisfied*	Dissatisfied	Very Dissatisfied	Don't Know	NA
<b>Neighborhood Amenities</b>							
Distance from hiking/biking trails	30%	58%	<b>88%</b>	7%	<1%	2%	3%
Distance from grocery stores	26	69	<b>95</b>	4	1	<1	<1
Neighborhood safety	25	60	<b>85</b>	13	1	1	<1
Distance from your children's schools	23	44	<b>67</b>	3	1	2	27
Distance from children's playground	22	45	<b>67</b>	8	1	3	21
Distance from work	21	59	<b>80</b>	6	2	1	11
Distance from bus stops	17	54	<b>71</b>	8	3	5	12

Note: Due to rounding, columns may not add to 100 percent. NA – not applicable

\* Sum of "Very satisfied" and "Satisfied"

**Table 13. Satisfaction with Neighborhood Amenities by Area of Anchorage**  
**Percent Saying They Are Dissatisfied or Very Dissatisfied**

	Northwest	Northeast	Central	Southeast	Southwest	Eagle River Chugiak
<b>Neighborhood Amenities</b>						
Distance from hiking/biking trails	5%	9%	10%	5%	6%	5%
Distance from grocery stores	8	0	9	5	4	8
Neighborhood safety	24	13	21	7	15	11
Distance from your children's schools	2	2	6	0	4	15
Distance from children's playground	4	14	8	7	12	8
Distance from work	2	7	6	8	13	8
Distance from bus stops	5	5	7	16	21	17

Note: Due to rounding, columns may not add to 100 percent. NA – not applicable.

Respondents are slightly less satisfied with their current property amenities than with their current neighborhood amenities. Energy efficiency is the area of greatest dissatisfaction, with one of three respondents either dissatisfied or very dissatisfied with their home's energy efficiency. Table 16 shows levels of dissatisfaction by area of Anchorage.

**Table 14. Level of Satisfaction with Current Property Amenities**

	Very Satisfied	Satisfied	Total Satisfied	Dissatisfied	Very Dissatisfied	Don't Know	NA
<b>Property Amenities</b>							
The view	24%	55%	79%	18%	2%	<1%	1%
Outside area for relaxing and entertaining	22	57	79	17	4	<1	<1
A place for parking	21	62	83	14	2	<1	1
Number of bedrooms	20	66	86	13	1	<1	<1
Design qualities and attractiveness	19	59	78	17	3	1	-
Place for children to play	18	50	68	11	3	2	16
Energy efficiency	15	50	65	28	5	2	1

Note: Due to rounding, columns may not add to 100 percent. NA – not applicable.

**Table 15. Satisfaction with Property Amenities by Area of Anchorage  
Percent Saying They Are Dissatisfied or Very Dissatisfied**

	Northwest	Northeast	Central	Southeast	Southwest	Eagle River Chugiak
<b>Property Amenities</b>						
The view	29%	14%	28%	18%	20%	8%
A place for parking	26	23	16	11	13	6
Outside area for relaxing and entertaining	23	24	28	14	16	10
Number of bedrooms	11	20	15	6	18	15
Design qualities and attractiveness	19	28	27	12	21	9
Place for children to play	13	19	17	9	17	8
Energy efficiency	40	30	35	29	38	31

Note: Due to rounding, columns may not add to 100 percent. NA – not applicable.

# Reasons for Choosing Current Neighborhood and House

## Reason for Choosing Current Neighborhood

Approximately one-third of respondents say the most important reason for choosing their current neighborhood was convenient location, either centrally located or close to work. Residents of Northwest, Northeast and Central Anchorage are most likely to say distance from work was the most important reason (21 percent, 14 percent, and 13 percent respectively). A range of other reasons is cited by one percent or less of respondents.

**Table 16. Other than price, what was the single most important reason for choosing your current neighborhood?**

	% of Respondents
Centrally located	22%
Quiet/private	11
Distance from work	10
Established neighborhood	9
Distance from your children's schools	8
Neighborhood safety	8
Living on military base	5
The view	4
Moved in with boyfriend/spouse/family/friend	3
Close to relatives/friends	3
Distance to shopping/grocery stores/restaurants/entertainment	3
Well-kept properties/attractiveness	2
Availability	2
Distance from hiking/biking trails/recreation	2
Other	5
Don't know/refused	4

Note: Due to rounding, columns may not add to 100 percent

## Reason for Choosing Current House

Design characteristics, and the size of the home and lot are the reasons respondents say are most important for choosing their current houses. Backyards/gardens are especially important to residents of Northwest Anchorage (16 percent say that is the most important factor versus 6 percent overall.) A range of other reasons is cited by one percent or less of respondents.

**Table 17. Other than price and location, what was the single most important property feature for choosing your current housing?**

	% of Respondents
Design qualities/attractiveness/layout/new home/built on own	23%
Square footage/size of home	20
Lot size	8
Backyard/gardens	6
Number of bedrooms	6
The view	5
Size of garage	4
Moved in with boyfriend/spouse/family/friend	4
Private lot/privacy	3
Secure building	2
Low maintenance	2
Other	13
Don't know/refused	5

Note: Due to rounding, columns may not add to 100 percent.

# Attitudes about Compact Housing

## Willingness to Live in a Smaller Home

Respondents are evenly split with respect to whether they would consider a somewhat smaller, well designed home in order to live in a “great neighborhood”. Respondents were allowed to make their own assumptions about the characteristics of a great neighborhood. No specific description was provided.

**Table 18. Based on what you can afford for housing right now, if you were actively looking for a new place to live in Anchorage, Eagle River or Chugiak, would you be willing to accept somewhat smaller rooms and less square footage if the new home were well designed and located in a great neighborhood?**

	% of Respondents
Yes	48%
No	47
Don't know	4
Refused	1

## Larger Home and Longer Commute versus Smaller Home and Shorter Commute

Respondents are evenly split with respect to a trade-off between home size and length of commute.

**Table 19. If price and quality were the same would you choose a larger home with more square footage and a 30 minute commute to work or a smaller home with a 5 minute commute to work?**

	% of Respondents
Larger home and a longer commute	46%
Smaller home closer to work	48
Don't know	5
Refused	2

Note: Due to rounding, column may not add to 100 percent.

Residents of Northeast Anchorage are more likely to prefer a larger home and longer commute (61 percent versus 46 percent for respondents as a whole). Younger respondents (many of whom likely represent growing families) and households with children are also more likely to prefer a larger home. Respondents in the 25-34 age group prefer a larger home and longer commute by a two-to-one margin. Single- and two-person households and older households (45 to 64) favor a smaller home and shorter commute by a margin of three to two. Older residents tend to live in smaller households. Fifty percent of two-person households and 25 percent of single-person households had respondents who are over 55 years of age.

## Larger Yard versus Close Proximity to Shopping and Restaurants

Six in ten respondents chose a larger yard over proximity to stores, restaurants and other businesses, but the preference is closely related to household size. Single-person households favor a location close to businesses over a larger yard 50 percent to 42 percent, with the remainder undecided. Three and four-person households favor a larger yard by approximately two to one.

**Table 20. Which is more important to your household, a larger yard, or a location close to stores restaurants and other businesses?**

	% of Total
Larger yard	60%
Location close to stores, etc.	35
Don't know	3
Refused	1

Note: Due to rounding, column may not add to 100 percent.

Seven in ten respondents between the ages of 25 and 44 prefer the larger yard. Respondents under 25 and over 65 tend to prefer being close to commercial amenities. Whether respondents *currently* own or rent does not affect their preference in this trade-off. However, of those who say they intend to *buy* their next home (three-quarters of respondents), 70 percent prefer a larger yard to a location with businesses, and of those who intend to *rent* their next home (one-quarter of respondents), 62 percent prefer a location close to businesses over a larger yard.

### “Highly Likely” Candidates for Smaller Homes

One way to think about the respondents who are most likely to consider smaller homes in the future is to group together those who stated they:

- Are likely to consider a smaller home in the future *and*
- Prefer a smaller home and shorter commute rather than a larger home and longer commute *and*
- Prefer being close to restaurants, stores and entertainment to having a large yard.

Approximately 18 percent (140 individuals) of all respondents answered all three questions in this manner. For this subgroup, the maximum margin of error at the 95 percent confidence level is +/- 8.3 percent. This group is somewhat older (median age 49) and, partly as a result, less likely to have children living in their households.

In other demographics, the highly likely candidates for compact housing do not differ significantly from respondents as a whole. They are also similar in regard to the square footage and number of bedrooms in their current home, current housing structure (for example, detached single family, multi-unit apartment), current housing tenure (rent or own), household income, ethnicity, and level of satisfaction with current housing.

The highly likely candidates, in most respects, value neighborhood amenities similarly to respondents as a whole. However, they are somewhat more likely to consider proximity to trails and open space, and also to grocery stores as important, and they show slightly less interest in play space for children (understandably because they have fewer children in the household). They also do not place as high a value on a large yard or the need for storage space for their recreational equipment. An online survey component of this housing demand study will provide additional data on amenity preferences for those interested in compact housing.

**Table 21. Summary of Selected Survey Results for  
“Highly Likely” Candidates for Compact Housing**

	% of Highly Likely Candidates (n=140)	% of Total (n=814)
<b>Demographics</b>		
Between the age of 18 and 44	43%	54%
Median age (years)	49	43
Household size – 2 or less	64	43
No children in the household	74	53
<b>Important or Very Important Neighborhood Amenities in Future Home</b>		
Near a grocery store	71%	54%
Sidewalks in the immediate neighborhood	65	54
Near trails or open space	63	52
Near work	53	46
Near children’s preferred school	32	49
Near children’s play areas	25	41
Near restaurants and entertainment	41	26
Near bus stops	36	24
<b>Important or Very Important Housing Features in Future Home</b>		
A large yard	28%	63%
Space to store recreational equipment, such as snow machines, small boats, or 4- wheelers	23	42

# Factors in Next Home Choice

## Single Family Home vs. Multi-Unit Apartment

Just over a one fifth respondents would consider living in a multi-unit complex. These tend to be households without children, either under age 25 or over age 60. Households with children are resistant to multi-family living. Eighty-two percent of households with more than three members say they would only consider a single-family home.

**Table 22. Based on what you can afford for housing right now, would you consider a multi-unit apartment or condominium complex for your next home, or would you only consider a single-family home?**

	% of Respondents
Multi unit	22%
Single family only	74
Don't know	3
Refused	1

Of the 18 percent of households who currently live in multi-unit complexes, 36 percent say they would consider a multi-unit complex for their next home. The remainder says they will only consider a single-family structure. At the same time, 82 percent of current multi-unit occupants say they are satisfied with their current homes.

## Rent vs. Buy

Eight out of ten households say they are more likely to buy than rent their next place to live.

**Table 23. If you were looking for a new place to live, would you be more likely to rent or more likely to buy?**

	% of Respondents
Rent	17%
Buy	79
Don't know	3
Refused	1

Younger people, single-person households and lower-income households are most likely to rent. Forty percent of those renting now say they are most likely to rent their next home as well. More than 90 percent of current homeowners say they are most likely to buy their next home.



## Importance of Neighborhood Amenities

Most of the neighborhood amenities are rated of similar importance in choosing their next home. Being near bus stops received the lowest rating, but tends to be more important for single-person households and lower income households.

**Table 24. Level of Importance of Neighborhood Amenities in Future Home**

	% Saying Important or Very Important	% Saying Very Important	NA
Sidewalks in the immediate neighborhood	54%	27%	<1
Near trails or open space	52	25	1
Near a grocery store	54	25	<1%
Near your children's preferred school	49	29	20
Near work	46	23	7
Near children's play areas	41	21	17
Near restaurants and entertainment	26	10	1
Near bus stops	24	17	2

## Importance of Housing Features

Energy efficiency is the most sought after housing attribute of those tested, followed by a garage that holds at least two cars. Ninety percent of respondents say energy efficiency is either important or very important.

**Table 25. Level of Importance of Housing Features in Future Home  
(Average score with 1 = not important and 5 = very important)**

	% Saying Important or Very Important	% Saying Very Important	NA
An energy-efficient design	90%	63%	<1%
A garage that hold at least two cars	74	58	1
Covered parking	68	45	1
A guest bedroom or office	67	38	<1
A large yard	63	38	<1
Space to store recreational equipment, such as snow machines, small boats, or 4-wheelers	42	24	1

## Most Important Reason for Choosing Next Home Location

Neighborhood safety, central location, and quiet/privacy are most often chosen as the single most important neighborhood characteristic. A range of other reasons is cited by one percent or less of respondents.

**Table 26. Other than price, what do you think would be the single most important reason for choosing the location of your next home?**

	% of Respondents
Neighborhood safety	22%
Centrally located	15
Quiet/private	12
Distance from your children's schools	8
Distance from work	7
Established neighborhood	6
Distance from hiking/biking trails/recreation	4
The view	4
Well-kept properties/attractiveness	4
Close to relatives/friends	3
Distance to shopping (other than grocery store)	2
Other*	7
Don't know/refused	6

Note: Due to rounding, column may not add to 100 percent.

\*"Other" reasons included neighborhood demographics, out-of-town setting, and distance from stores, restaurants, entertainment, and playgrounds, along with a variety of reasons mentioned by just one or two respondents

## Most Important Reason for Choosing Next Home Features

Attractive design and more space (inside and outside) are most often chosen as the single most important home features. A range of other reasons is cited by one percent or less of respondents.

**Table 27. Other than price and location what do you think would be the single most important property or amenity feature for choosing your next home?**

	% of Respondents
Design qualities/attractiveness/layout/new home	22%
Upsizing/more square footage	20
Bigger lot size	8
Size of garage	7
Backyard/gardens	7
Energy efficiency	7
One-level/few stairs/handicapped accessible	6
Private lot/privacy	5
Downsizing/less square footage	3
Other*	9
Don't know/refused	6

Note: Due to rounding, column may not add to 100 percent.

\*"Other" reasons included low maintenance, storage, natural light, view, secure building, and pets, along with a variety of reasons mentioned by just one or two respondents.

Respondents with the lowest and highest incomes, those who are newest to Anchorage and Eagle River-Chugiak, and those in the military are among the groups most likely to say they need more square footage. Twenty-nine percent of respondents living in attached homes say that more square footage is their number one priority. This suggests they see the attached home as an interim step to something larger.

## Likeliness to Move

Slightly more than half the respondents (54%) say it is likely (or very likely) they will move in the next five years. Eighty-six percent of respondents who are dissatisfied with their current homes say they are likely to move. Among respondents 55 years of age and older, one third say they are likely to move within five years.

**Table 28. How likely are you to move within the next 5 years?**

	% of Respondents
Very likely	29%
Likely	25
Unlikely	19
Very unlikely	24
Don't know	3
Refused	1

Note: Due to rounding, column may not add to 100 percent.

Younger and lower income respondents are most likely to say they will move (roughly two-thirds say they are likely or very likely). Respondents living in multi-unit, duplex or attached homes are much more likely to move than those living in detached, single-family houses (approximately 75 percent versus 40 percent). Residents of Northeast and Central Anchorage are somewhat more likely to move than those in other subareas. Seventy percent of respondents whose homes are less than 1,000 square feet and three-quarters of active military say they are likely to move in the next five years.

## Actively Searching Now

Of the 54 percent of respondents who say they are likely to move within five years, only one quarter are actively looking for a new home now.

**Table 29. Are you actively searching for a new home now?**  
(Base: Those who are very likely or likely to move in the next 5 years)

	% of Respondents
Yes	25%
No	71
Don't know	3
Refused	2

Note: Due to rounding, column may not add to 100 percent.

## Expected Location of Next Home

Of those who expect to move within the next five years, slightly less than half expect to remain in the Anchorage Bowl. Three in ten of the likely movers expect to move out of Alaska.

**Table 30. If you were to move in the next 5 years,  
where would your next home likely be?**  
*(Base: Those who are very likely or likely to move in the next 5 years)*

	% of Respondents
The Anchorage Bowl	46%
Outside Alaska	30
Eagle River or Chugiak	9
Elsewhere in Alaska	5
Mat-Su	4
Girdwood	<1
Don't know	4
Refused	2

Note: Due to rounding, column may not add to 100 percent.

Of all the respondents who have lived in Anchorage or Eagle River-Chugiak less than five years, one third expect to leave Alaska within the next five years. Of all the respondents who have lived in Anchorage or Eagle River-Chugiak more than 10 years, just 10 percent expect to leave the state within the next five years.

Of respondents over 55 years of age, approximately 10 percent expect to move outside Alaska within the next five years.

# Respondent Demographics

## Age, Gender and Ethnicity

The tables below show demographic characteristics of the survey respondents after the data was weighted to adjust for age representation.

**Table 31. Gender**

	% of Respondents	% of Municipality of Anchorage
Female	57%	49%
Male	41	51
Don't know	2	-

Source: U.S. Census Bureau 2009 ACS estimates

**Table 32. Age**

Years	% of Respondents	% of Municipality of Anchorage*
18 - 24	11%	16%**
25 - 44	43	40
45 - 64	36	35
65+	10	10
<b>Average Age</b>	<b>43.7 years</b>	

\*Source: U.S. Census Bureau 2009 ACS estimates

\*\*Approximate. ACS does not have an 18-24 age category.

The average age of respondents is 44. Those from Northeast and Central Anchorage are somewhat younger than average (39.4 and 42.5 years respectively). Respondents from Southeast Anchorage and Eagle River-Chugiak are somewhat older (47.5 years old on average)

**Table 33. Racial or Ethnicity**  
(multiple responses accepted)

	% of Respondents	% of Municipality of Anchorage*
White/Caucasian	72%	69%
Black or African American	6	6
Hispanic	3	8
Alaska Native/American Indian	7	6
Asian/Pacific Islander	7	8
Other	1	2
Don't know/Refused	5	-

\*Source: U.S. Census Bureau 2009 ACS estimates

## Household Characteristics

### Household Size

Two-person households (30 percent of respondents) represent the largest household size category. Respondents have an average of 3.1 persons in their households.

**Table 34. Including yourself, how many people live in your household for at least nine months out of the year?**

# of Persons	% of Respondents
1	13%
2	30
3	19
4	21
5+	16
Don't know	<1
Refused	<1
<b>Average household size of respondents</b>	<b>3.1 persons</b>
<b>Average household size in the Municipality of Anchorage</b>	<b>2.7 persons*</b>

\*Source: U.S. Census Bureau 2009 ACS estimates

## Children in the Household

Just over half of respondents had no children in the household. There is an average of two children in the households that have children.

**Table 35. How many children under the age of 18 live in your household?**

# of Children	% of Respondents
0	53%
1	17
2	18
3+	11
Refused	<1
Average number of children in households <u>with</u> children	2.0 children
Average number of children in <u>all</u> households	0.9 children



## Household Income

Almost a quarter of the respondents (23 percent) estimated they had a household income of \$40,000 or less in 2010. One in ten households had an average household income of \$150,000 or more.

**Table 36. Household Income, 2010**

	% of Respondents
Less than \$20,000	8%
\$20,001 - \$40,000	15
\$40,001 - \$60,000	13
\$60,001 - \$80,000	14
\$80,001 - \$100,000	11
\$100,001 - \$125,000	9
\$125,001 - \$150,000	6
\$150,001 - \$200,000	6
\$200,000+	4
Don't know	2
Refused	12
<b>Average household income for respondents (average of ranges)</b>	<b>\$80,000</b>
<b>Average household income in the Municipality of Anchorage</b>	<b>\$88,622*</b>

\*Source: U.S. Census Bureau 2009 ACS estimates

## Military Households

Fifteen percent of respondent households have a member who currently serves in the military. Military households are younger and somewhat lower income than non-military households. (See Appendix 2 for a summary of statistically significant differences in housing preferences between military and non-military households.)

**Table 37. Do you or any member of your household currently serve in the military?**

	% of Respondents
Yes	15%
No	84
Refused	1

# Appendix 1: Comparison of Military and Non-military Households

This appendix shows selected, statistically significant differences between households with and without members who are active military.

	Households with Active Military	Non-military Households
<i>Percent of respondents with/without military personnel</i>	<b>11%</b>	<b>89%</b>
<b>Demographics</b> ( <i>Demographics shown are for respondents and may not be identical to those of the general population</i> )		
Median age	32	45
Average number of children per household	1.5	0.8
Average household income	\$70,000	\$82,000
<b>Housing</b>		
Average length of residency in MOA	7.5	22
Average years in current home	3	9.5
Percent who own their current homes	36%	73%
Percent who occupy a detached, single-family house	38%	63%
Estimated average monthly rent or mortgage payment	\$1,358	\$1,149
Percent likely or very likely to move within 5 years	77%	50%
Percent likely to move outside Alaska	64%	22%

*Note: Demographic and housing characteristics for which there was no statistically significant difference between military and non-military households are not listed.*

The overall satisfaction level of military households is not statistically different from that of non-military households (94 percent are satisfied or very satisfied). Their willingness to consider somewhat smaller homes (47 percent would consider it) are also statistically identical to those of non-military households.

## Preferences for Next Home

In addition to the characteristics highlighted in the table, military households tend to reflect the priorities of younger families in general. For example, they place higher value than non-military households on access to children's play space and they would rather have a larger yard than be close to stores, restaurants and businesses. They are also somewhat more interested than non-military households in having a two-car garage and additional space to store recreational equipment.

Fifty-seven percent of military households say it is important to be close to work (versus 45 percent of non-military households). However, they are similar to other younger households in that nearly two-thirds prefer a larger home and longer commute to a smaller home closer to work.

## Appendix 2: Comparison of Renters and Homeowners

This appendix shows selected, statistically significant differences between households that rent and own their current homes.

	Renters	Owners
<b>Percent of respondents who rent or own their homes</b>	<b>32%</b>	<b>68%</b>
<b>Demographics</b> ( <i>Demographics shown are for respondents and may not be identical to those of the general population</i> )		
Median age	32	48
Percent white ethnicity	60%	78%
Average household income	\$46,000	\$99,000
Average number of children per household	1.1	0.8
Percent with a household member in the military	28%	8%
<b>Housing</b>		
Average length of residency in MOA	12	23.8
Average years in current home	2.9	11.4
Average number of bedrooms	2.5	3.4
Percent who occupy a detached, single-family house	17%	80%
Percent whose homes include a garage	40%	79%
Estimated average monthly rent or mortgage payment	\$1,045	\$1,251
Percent satisfied or very satisfied with current home	85%	96%
Percent likely or very likely to move within 5 years	81%	41%
Percent likely to rent, rather than buy, their next home	39%	6%
Percent likely to move outside Alaska	64%	22%

*Note: Demographic and housing characteristics for which there was no statistically significant difference between renters and owners are not listed.*

As noted in the body of the report, there is no difference between renters and owners in their willingness to consider a smaller residence in exchange for a well designed home in a great neighborhood; 48 percent of both groups say they would. Similarly, there is no statistical difference in the number of renters and owners who are willing to consider living in a multi-unit complex for their next home. About one-quarter would consider it.

## Preferences for Next Home among Renters and Owners

The table shows home and neighborhood characteristics that differ in importance to renters and owners with respect to their next choice of homes. Some of these differences undoubtedly reflect the lower median age and household income of renters.

**Percent of Renters and Owners Saying “Important” or “Very Important”**

	% of Renters	% of Owners
Near bus stops	34%	19%
Near a grocery store	61	51
Near children’s preferred school	56	46
Near children’s play areas	51	36
Near work	55	42
Near restaurants and entertainment	34	23
Sidewalks in the immediate neighborhood	64	49
A garage that holds at least two cars	68	77
Space to store recreational equipment	36	45
A guest bedroom or office	60%	71%

*Note: Neighborhood and housing characteristics for which there was no statistically significant difference between renters and owners are not listed.*

## **Appendix 3: Telephone Survey Instrument**

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The survey instrument follows on the next pages.

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# **Anchorage Housing Market Analysis Appendix B: Household Online Survey Results**

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## Appendix B: Table of Contents

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# Purpose and Methodology

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## Purpose

The purpose of the Online Survey and Discrete Choice Exercise (DCE) is to help the Municipality of Anchorage (MOA) better understand the population's preferences for different home feature packages associated with Compact Urban Housing (CUH). The online survey was designed to test the attractiveness of certain neighborhood amenities in comparison to specified price, location, square footage and outdoor space alternatives. Specifically, the DCE is a conjoint analysis that quantifies market demand based on how respondents trade off different factors such as amenities, size and price.

The online survey and DCE results are designed to supplement the telephone survey of 814 Anchorage, Eagle River and Chugiak households that serves as the main, primary research component of the *Anchorage Housing Demand Market Analysis*. Results of these surveys, along with an extensive analysis of housing data and economic modeling, will be used to support a 20 year housing demand study for the Anchorage Bowl, Eagle River and Chugiak. This study is led by McDowell Group, an Alaska research and consulting firm, in association with ECONorthwest, a nationally recognized leader in housing demand analysis and modern redevelopment planning.

## Methodology

### Fielding and Sampling

Designed in consultation with MOA, the online survey was fielded between February 4<sup>th</sup> and 13<sup>th</sup>, 2011 using a stratified sample designed to be representative of the greater Anchorage (including Eagle River and Chugiak) population for age and income. The sample was purchased from a nationally known, online-panel provider. A total of 406 complete survey responses were obtained; 298 of these respondents expressed a willingness to consider CUH. The Discrete Choice Exercise (DCE) portion of the survey was completed by only these 298 respondents. The maximum sampling error for a random sample of these sizes is +/- 4.9 percent (general questions) and +/- 5.7 percent (DCE).

### Demographics of the Total Online Sample and the DCE Subsample

The total sample and DCE subsample are both demographically similar to the Anchorage population as a whole. Household income is slightly lower and current home size slightly smaller for the DCE subsample than for the total sample. However, age and income for the DCE subsample match the Anchorage population closely. The total online sample slightly understates households with less than \$50,000 a year income and respondents who are under 35 years of age.



### Selected Demographics of Survey Respondents

	DCE Sub-sample n=298	Total Online Sample n=406	Anchorage Population Data*
<b>Age</b>			
18 to 34 years	35%	32%	38%
35 to 54 years	41	43	40
55 years and older	24	25	22
<b>Gender</b>			
Male	31%	33%	51%
Female	69	67	49
<b>Annual Household Income</b>			
Less than \$50,000	37%	31%	34%
\$50,000 to \$100,000	34	36	35
More than \$100,000	29	33	31
<b>Ethnicity</b>			
White	85%	86%	69%
Alaska Native/American Indian	7	7	6
Asian/Pacific Islander	7	6	8
Hispanic/African American	8	6	14
Other	2	2	2
<b>Education Level</b>			
High School, GED or less	7%	6%	29%
Some college	27	26	28
One year or more of technical certification	4	4	na
Associates or 2-year degree	7	7	9
Bachelors or 4-year degree	31	34	21
Masters or Doctorate	23	23	12

\*U.S. Census Bureau, American Community Survey 2009

## Housing Characteristics of Survey Respondents

	DCE Sub-sample n=298	Total Online Sample n=406	Anchorage Population Data*
<b>Household Size</b>			
One	20%		
Two	40		
Three	17		
Four	11		
Five or more	11		
Average household size	2.6	2.6	2.7
<b>Current Home Size</b>			
Average square footage	1,678	1,780	na
<b>Home Ownership</b>			
Rent	32%	29%	38%
Own	64	68	62
Other (e.g., live with friends)	4	3	na

\*U.S. Census Bureau, American Community Survey 2009

## Survey Design

The survey consisted of three main parts: screening and demographic questions, questions about existing and preferred housing, and a forced-choice/trade-off exercise, the DCE. Several of the survey-type questions were designed to support the analysis of the DCE. The general survey questions addressed the following content areas:

- Reasons and time frame for moving
- Location preferences
- Home structure preferences
- Neighborhood amenities preferences
- Attitudes toward compact housing
- Commuting behavior

The 298 respondents who participated in the DCE were presented with 12 randomly generated task questions and two fixed-task questions. The purpose of the fixed-task questions is to test whether respondents answered questions consistently. Data from the DCE was used to generate a home-preference database that reflects 3,576 independent respondent decisions. This database was used to run market simulations. The majority of information supplied in this report is derived from those market simulation scenarios.

The DCE examined five attributes:

- **Neighborhood amenities** – different combinations of neighborhood characteristics
- **Home size** -- in square feet calculated based on the individual respondent's current home size
- **Monthly payment** – calculated by multiplying home size by cost per square foot
- **Location** -- based on a map showing 5 subareas of Anchorage, Eagle River and Chugiak
- **Amount of private outdoor space** – ranging from none to a medium-size yard

Each attribute was presented at five different levels:

- **Neighborhood amenities** Respondents were not provided the theme label, only a list of the neighborhood characteristics. They were told the specific amenities that would be within a five to ten minute walk. (Labels below were adopted for convenient reporting.)
  1. "Entertainment" -- Restaurants, shopping, nightclubs, theatre
  2. "Mature Adult" -- Gallery/museum, restaurants, grocery store, medical/dental offices
  3. "Work Life" -- Most employment opportunities, public transportation, grocery store
  4. "Family" -- School, park, walking/bike paths
  5. "Recreation" -- Health club, walking/bike paths/park
- **Home size**
  1. Current home size
  2. 10 percent less square footage
  3. 20 percent less square footage
  4. 10 percent more square footage
  5. 20 percent more square footage
- **Monthly payment**
  1. \$175/square foot
  2. \$200/square foot
  3. \$225/square foot
  4. \$250/square foot
  5. \$275/square foot
- **Location** (*See map on page 13.*)
  1. Northwest
  2. Northeast
  3. Southwest
  4. Central
  5. Suburban (a combination of Southeast Anchorage and Eagle River/Chugiak)

- **Amount of private outdoor space**

1. No private outdoor space
2. Patio or deck only
3. Small garden with patio
4. Small yard with grass and/or garden and patio
5. Medium yard with grass and/or garden and patio

The combination of a specific attribute at a specific level is called an “element.” There are 5X5, or 25, elements in this exercise. The DCE requires respondents to choose among “packages” of five elements each, covering each of the five attributes in the study. The following are examples of possible packages:

Entertainment amenities + current home size + \$175/sq. ft. + Northwest + no private outdoor space

– OR –

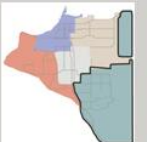
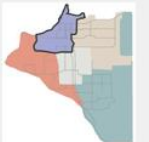
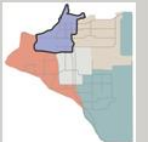

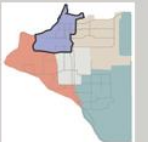
Work/Life amenities + 20% smaller home size + \$175/sq. ft. + Northwest + small yard with patio

Respondents were presented with five packages at a time and asked which they would select for their next home. Respondents could also choose “None.”

A sample screen from the DCE is presented below. Please see Appendix 1 for additional technical findings.

**Among these five home and neighborhood packages, which would you select for your next home?**

Click the button below your most preferred package; if none meet your requirements, then select the “none” choice.

<b>AMENITIES:</b> Listed amenities within 5-10 minute walk of home	<b>Neighborhood with:</b> school, park, bike paths, paved sidewalks	<b>Neighborhood with:</b> restaurants, shopping, nightclubs, theatre	<b>Neighborhood with:</b> most employment opportunities, public transportation, grocery store	<b>Neighborhood with:</b> park, run/xc/ski/bike paths, health club	<b>Neighborhood with:</b> gallery/museum, grocery store, medical/dental offices	NONE: I wouldn't choose any of these.
<b>HOME SIZE:</b>	1,600 square feet	1,600 square feet	1,600 square feet	1,600 square feet	1,600 square feet	
<b>PRIVATE OUTDOOR SPACE:</b>	Small yard - grass and/or garden with patio	Small garden with patio	Small garden with patio	Small yard - grass and/or garden with patio	Small garden with patio	
<b>LOCATION:</b>	 <b>SUBURBAN</b> includes Southeast, Chugiak, Eagle River	 <b>NORTHWEST</b>	 <b>NORTHWEST</b>	 <b>SUBURBAN</b> includes Southeast, Chugiak, Eagle River	 <b>NORTHWEST</b>	
<b>MONTHLY COST:</b>	\$1,726.71	\$1,726.71	\$1,726.71	\$1,726.71	\$1,726.71	
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

# Key Findings – General Survey Questions

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## Reason for Next Move

Job change, change in their financial situation, retirement, and desire for a larger or smaller home were the top five responses to why respondents may consider moving.

***Looking forward, which of the following types of events is most likely to trigger a move to your next home?  
(Multiple selections allowed).***

	% Selecting
Job change	27%
Change in financial situation	25
Retirement	24
Want a larger home	24
Want a smaller home	16
Marriage/divorce	13
Children moving out	11
Purchase home as an investment	11
Want a more rural lifestyle	9
New children	8
Want a second home	6
Want a more urban lifestyle	6
Want to reduce commute time	5
Other	19

## Type of Next Home

Most respondents (82 percent) would consider a single-family, detached home, and 60 percent would consider *only* that type of housing structure. However, 30 percent would consider living in a multi-unit complex.

*What home types would you consider for your next home? (Multiple responses accepted) (n=404)*

- Single-family detached home – 82 percent
- Single-family attached home – 22 percent
- Only consider a detached, single-family home – 60 percent
- Condominium or apartment in a multi-unit complex – 30 percent

## Interest in Compact Housing

Respondents were presented with the following description of CUH before they responded to a question about their willingness to consider CUH.

*“New construction of Compact Urban Housing is created in a few neighborhoods within Anchorage. This type of housing includes different structures (single-family detached houses, townhouses, and condominium apartments). Each type of structure comes in a wide selection of floor plans and interior designs. All these Compact Urban Housing options have one thing in common, however. They are all 10 percent to 20 percent smaller than equivalently priced homes in more suburban areas. Again, new Compact Housing is available in a few areas within Anchorage. It has a wide selection of designs, but for the same price it provides less space than homes in more suburban locations.”*

After reading this definition, surveys responded to the question:

*Are you willing to consider compact housing? (with no neighborhood description provided) (n=406)*

- Yes = 41%, No = 36%, Don’t Know = 24%

Survey comments such as those found on pages 10, 11, and 12 suggest many people have a negative association with the term “compact urban housing.”

However, specifying that the CUH has an appealing location and amenities offsets some of the negative association. Respondents learned more about the concept of CUH within mixed-use neighborhoods after reading the following description:

*“An important aspect of Compact Urban Housing is that it is often located in Mixed-Use Neighborhoods. These types of neighborhoods include a variety of housing options with a mix of amenities like parks and trails, public transportation, sidewalks, schools and a variety of businesses for dining, groceries, shopping, health/medical, entertainment (e.g., theaters, clubs, etc.), and arts and culture.”*

*In order to accommodate more families in or near Mixed-Use Neighborhoods, homes and lots may need to be smaller than in more spread-out areas. This Compact Urban Housing could include both attached apartment and townhouse homes as well as smaller detached single-family houses. The common element to all of these different types of homes is that they use less total space than many homes typical of more suburban or rural areas. A key characteristic of Compact Urban Housing is homes with indoor and outdoor living spaces that are 10 to 20 percent smaller than equivalently priced homes in more suburban locations.”*

After reading this description and then asked the question below, more respondents were willing to consider compact housing than they were when first asked about compact housing.

*Are you willing to consider compact housing if it were located in an area of Anchorage you find appealing and it included the right mix of neighborhood amenities for your lifestyle? (n=406)*

- Yes = 55%, No = 27%, Don't Know = 18%

## **Reasons for Their Choice**

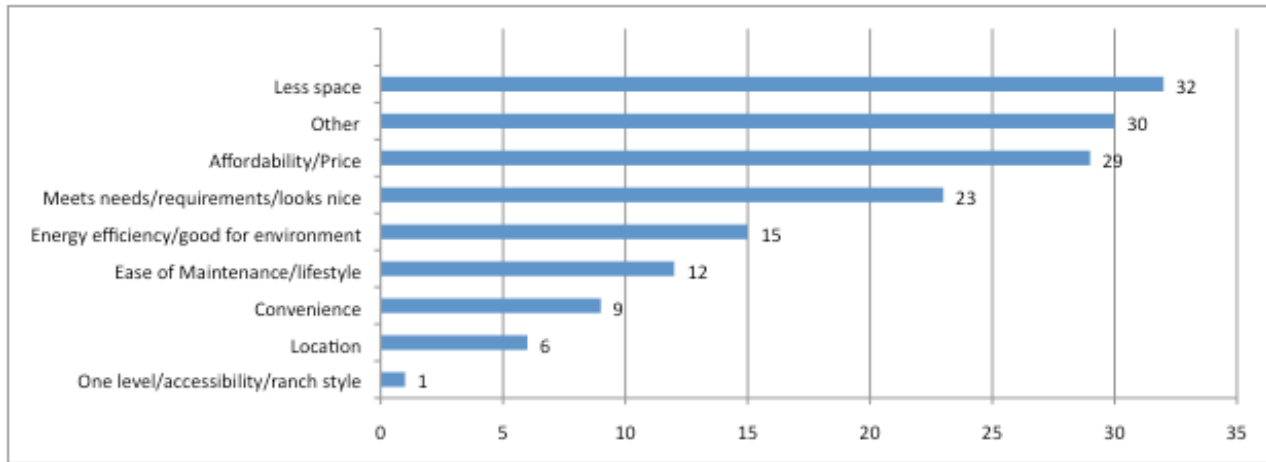
Respondents were asked why they would, or would not, consider compact housing. When verbatim comments were categorized and analyzed, they suggested two general types of homebuyers.

**“Keep Things Simple”** – These people will consider compact housing. They say they do not need a lot of space, want their home to be more affordable, want less maintenance, want to be more environmentally sound, and want a convenient location.

**“My Home Is My Castle”** – These people do not want close neighbors, feel that a bigger house is a better financial deal, want a big yard for kids and dogs, and generally do not like urban environments or anything labeled “compact housing.”

Demographically, the two groups are similar, though retirees tend to fall into the “keep things simple” category and growing families tend to want “castles.” Whether a respondent falls into one category or the other may in part reflect the role people expect housing to play in their lives, and this may extend to feelings about the fundamental nature of community. Those attitudinal differences go beyond home and neighborhood amenities and, therefore, beyond the scope of this study.

## Why would you consider living in Compact Urban Housing? (n=165)

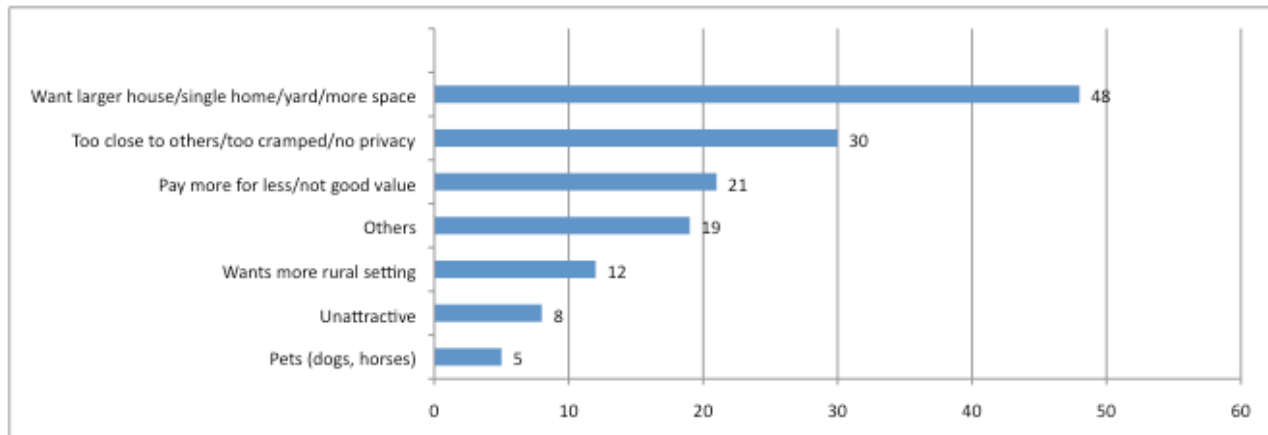


Following are representative comments from those who said they *would* consider CUH:

- *Smaller housing means less work, less taxes, and might be the only way to get into a desired neighborhood.*
- *We just need somewhere to live where we feel safe and there are no structural complexities. If the PRICE were affordable, then yes, we would want to live there.*
- *We have more space than we need now but we are already here and moving is hard. We still have our kids stuff in our house, including "their" bedrooms, and they will eventually be moving all that stuff out. We need to shrink our # of possessions as we get older and will need ranch style single level floor plan. Being close to walkable errands would be excellent but I like being right on the bike path now. Hopefully compact urban housing would be very energy efficient.*
- *We don't need to live in a huge home, however, it would need to suit us and be located in a decent part of town.*
- *Though I strongly dislike the idea of paying the same amount for less space, I am aware that when living in a city that is frequently the only option.*
- *Smaller, more space smart living is something that's appealing to my needs.*
- *Simple housing in a convenient location.*
- *It sounds like it uses less land per person, and has green spaces within the community. It sounds like a nice community-oriented development. Plus, being new construction things in the house won't be breaking (or shouldn't be!) Probably people living there would have the same values that I do.*
- *I'm tired of cleaning so large a house, and think that a more compact use of land space is environmentally and fiscally sensible.*
- *If we live in a walk-able neighborhood near recreational areas like parks and trails, then we don't need a big yard.*
- *Affordability, convenience, limited maintenance of grounds.*



## Why would you *not* consider living in Compact Urban Housing? (n=145)

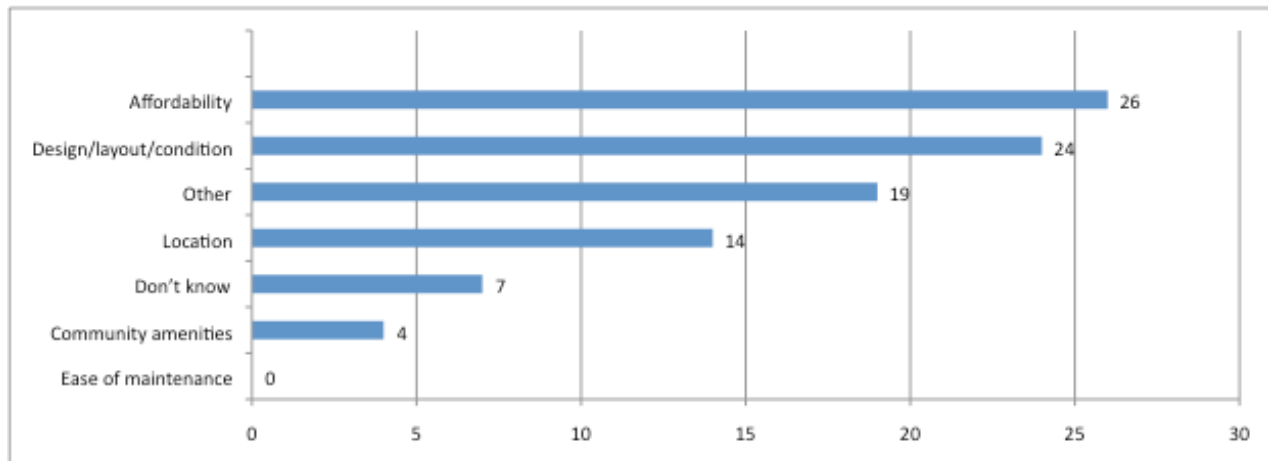


Following are representative comments from those who said they *would not* consider CUH:

- *10% - 20% smaller for the same price as a significantly larger home on a similar lot? Why would someone want to pay more to get less? People don't look to buy homes with the idea that they want the smallest home that they can find for the money, they want the largest.*
- *Because there are WAY too many houses and apartments in Anchorage but not enough space between yourself & the neighbors. I wouldn't recommend living in Anchorage to anyone.*
- *Compact Urban housing? At least the name implies the nightmare. I don't want to live with a bunch of people around.*
- *Fire trucks can't get into these neighborhoods to assist in times of emergencies. The streets are too narrow. Also the housing is too dense (population-wise).*
- *I don't like living close to people, common walls are noisy and the price of dues is way to high in the Anchorage area. I want a garden and a nice size yard.*
- *I don't want to live in a cramped planned urban development. I want to live on the upper hillside with a larger lot size and a view. My experience with Compact Urban Housing is that it is too compact and NOT in areas where my wife and I want to live.*
- *I prefer more space & have no desire to be in a "stacked" neighborhood. Plus, many of these types of developments begin as places to purchase a home & turn into rentals quickly. I've done the rental neighborhood thing in my youth & have no desire to return to that environment of non-caring & transitional neighbors.*
- *I would not have the natural landscape around me. We prefer to live in more rural, large lot (2 acres or more), private areas, with easy access to the wilderness*
- *We would not consider living in Compact Urban Housing because when we purchase a home and land, we hope to have enough land for our children to play on, our dogs to run, us to have a garden, and more wild, undeveloped space close to the Chugach base.*

- *When you isolate people into smaller areas people behave badly. The only way that I could ever consider this alternative would be if and only if there was serious deed restrictions and security. By security I mean gated with roving officers.*
- *Why would I want to pay the same price for 20% less space? It doesn't make sense unless there is some other compelling reason, like it is much more energy efficient.*
- *Yes...but not in Anchorage!*

**For those who are unsure, what would make you consider living in Compact Urban Housing? (n=96)**



Following are representative comments from those who said they are unsure if they would consider CUH:

- *If we got a really good deal. We'd want to be able to quickly get into town for shopping, doctors, PAC etc. We'd like to have less to do with the snow and ice. We'd like a library nearby.*
- *If it was big enough for my family and it was close enough to walk/bike to work and school.*
- *Condominium style living with own land, also a parking area for toys (boats, atv, snowmachines)*
- *Close to shopping no stairs garage no lawn work or snow removal for self pleasing appearance well built secure neighborhood no stairway close to church*
- *Aesthetics! Most housing in Anchorage is awful. We have such beautiful surroundings and such ugly housing!*
- *Access to wooded areas, green spaces*
- *Cost, location*
- *Price, arrangement of space and storage*
- *Safe location, proximity to non-big box shopping and to cultural events*
- *The land it is on, reputation and reliability of construction, price and area. Access in and out of the neighborhood.*
- *Would need to see it to decide that. Smaller for the same price doesn't sound like much of a deal to me.*

- *Privacy and peace and quiet are paramount in my next home. If the CUH had a PRIVATE deck (ie. not visible to the neighbors) and I could be guaranteed NOT to hear the people on the other side of the wall or lots of traffic noise, I might consider it, IF it also had a good view of the mountains. My next home must be better than where I am now, not just bigger. Though my tiny apartment is not sound-proof, it does have a private deck and view of the mountains, which I don't want to give up just for more space.*

## Neighborhood Amenity Preference

Respondents were asked to allocate 100 points among the following ten neighborhood amenities in accordance with how important each amenity is to the respondent:

### Point Distribution for Ten Neighborhood Amenities

	Points
Grocery store	17.0
Walking/running/biking paths	13.6
Parks	11.8
Shopping & entertainment businesses (e.g. clothing stores, movie theatre, clubs, etc.)	10.4
Paved sidewalks	10.1
Restaurants	9.2
Schools	7.9
Health club & medical services	7.9
Public transportation	6.6
Arts & culture	5.4
<b>Total</b>	<b>100.0</b>

The three top-rated amenities — grocery stores, paths, and parks — are also the ones that received the highest preference in the DCE.

## Commuting

A series of questions were asked regarding respondents' commuting habits.

- Three-quarters of all respondents commute an average of 5 times a week.
- Median commute time one-way is fifteen minutes.
- 90 percent of the commuters travel by car.
- 90 percent of all respondents never take buses.
- 40 percent of all respondents would take buses at least once a month "if they were regular, affordable, and traveled between respondent's neighborhood and other major areas of Anchorage (including Eagle River/Chugiak)."

# Key Findings – Discrete Choice Exercise

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## Data Limitations

The DCE analysis identifies the relative value (utility) people attach to the elements presented. That set of elements is necessarily limited. In this exercise, respondents evaluated five attributes (home size, price, location, neighborhood amenities and outdoor space) with each attribute at five different levels (amounts or types) for a total of 25 elements. Each individual package choice presented to respondents consisted of five elements (one for each attribute) and respondents were presented with five packages at a time, plus a “none are acceptable” choice.

DCE results are valid only for the specific tradeoffs presented to respondents. The DCE results cannot identify the potential effects on purchase decisions of elements that are not included in the tradeoffs. For example, this DCE did not address the effects of home design, interior layout, number of bedrooms or bathrooms, presence or size of garage, or many other factors that may influence home purchase decisions. To understand the interplay of additional factors for the broad range of locations, amenities, prices and sizes that needed to be addressed would require a much more extensive research plan.

Because the population of interest in this study is very broad, i.e., anyone who might be interested in CUH, the attributes and levels chosen are quite general. The same DCE technique could be used in the future to obtain more detailed information on a more limited set of housing types, neighborhoods, amenities and market segments. For example, a DCE could help identify the most important characteristics of a CUH project that targets seniors or young couples, or one that is located close to the city center. The findings in this study target the broader common denominators underlying interest in CUH.

## Primary Source of Findings

The DCE statistical analysis identifies “importance” and “utility” scores for each of the tested attributes. These scores may then be used to run market simulations that combine and compare various attributes and levels in ways that go beyond the comparisons presented to the respondents in the exercise. The findings described below are based, in part, on these market simulations and in part on responses to other questions in the online survey.

## Relative Importance of the Five Attributes Tested

The importance of an attribute is defined as its weight or the maximum influence it can have on product choice, given the range of attribute levels defined in the study. Importance scores express the difference between the most and least preferred level for each attribute by each individual respondent. The relative importance of the major elements tested in the DCE are as follows:

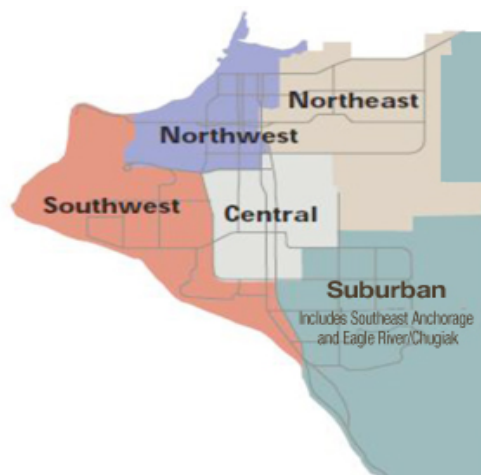
1. Location
2. Outdoor space
3. Home size
4. Neighborhood amenities
5. Cost (within the limits of the exercise)

**Finding:** With respect to the five attributes tested, location is the most important, accounting for 25 percent of the choice decision. Second most important is the amount and type of private outdoor space, accounting for 23 percent of the decision. Home size accounts for 19 percent of the decision, and Neighborhood amenities 17 percent. Cost accounts for the lowest proportion of the choice decision among the five attributes (16 percent). This does not mean people do not care about cost. Rather, given the range of costs presented, cost was not a dominant consideration for most respondents in most of the tradeoffs.

### Location Preference

Below is a map that was used to define sub-areas in Anchorage. Eagle River-Chugiak was rolled into the Suburban sub-area with Southeast Anchorage because the study need needed to limit the number of levels of location to be tested to five and these two areas (Eagle River-Chugiak) has similar neighborhood characteristics to warrant combination.

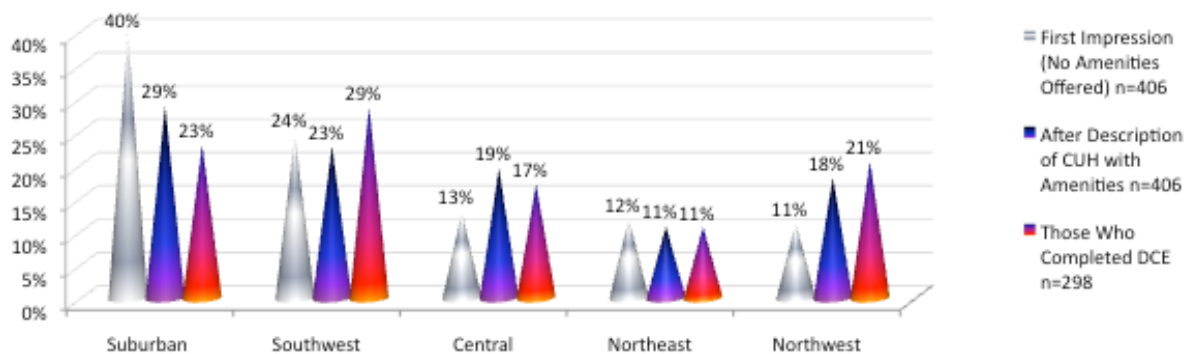
**Map of Anchorage Subareas**



**Finding: Preference for location (i.e., subarea of Anchorage desired for the next home) changes as respondents feel more favorable toward CUH and as they learn more about the relationship between CUH and neighborhood amenities.**

Respondents were asked the preferred location for their next home at three different points in the survey. First, all 406 respondents were asked, with no other context, what subarea of Anchorage they would prefer for their next home. The most popular choice was Suburban Anchorage (including Southeast Anchorage, Eagle River and Chugiak) (white cones in the chart below). Second, 298 respondents who said they would consider CUH in a mixed-used neighborhood were asked again about their location preference. Suburban Anchorage is still the most popular for this subgroup, but by a lower margin (blue cones). Finally, after those same 298 respondents had been asked to think about neighborhood amenities in various ways by both the general questions and the DCE, Southwest Anchorage became the most popular location, and Northwest Anchorage had increased in popularity as well (red cones). Northeast Anchorage remained the least popular subarea throughout the survey.

### Three Measures of Location Preference



**Finding: Analysis of head-to-head tradeoffs in the DCE indicates that those 298 respondents prefer the following locations in descending popularity:**

1. Southwest
2. Northwest
3. Central
4. Suburban
5. Northeast

This rank ordering is slightly different from the one obtained from the three questions described above. It is derived from tradeoffs in the DCE where respondents had the opportunity to chose one location over another while other variables were held constant. This is likely the most accurate rank ordering with respect to the 298 respondents who said they would consider CUH.

These results indicate that the most promising areas for development of CUH are Southwest and Northwest Anchorage.

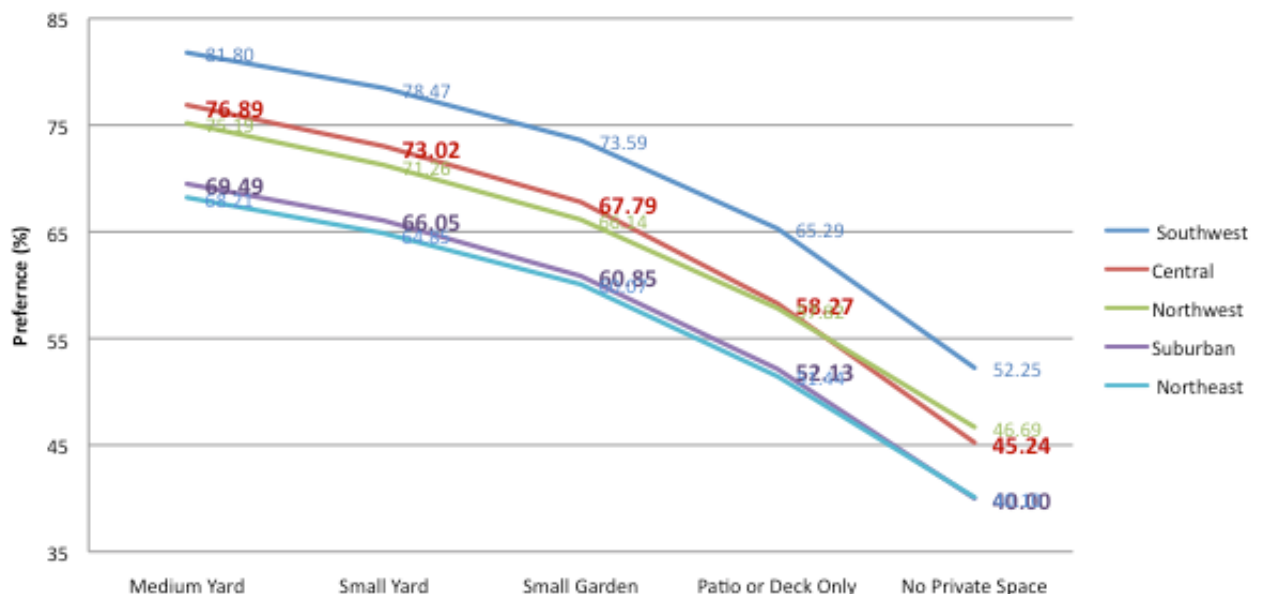
## Outdoor Private Space

**Finding: Interest in CUH developments will be improved if, where feasible, plans include at least a small outdoor garden space for each unit.** All 298 respondents who participated in the DCE expressed a willingness to accept somewhat less interior home space than what they currently have. They nevertheless want private outdoor space, and the more the better, within the bounds of the survey choices.

The graph shows that preference for outdoor space is highest when coupled with CUH located in Southwest, next highest in Central and Northwest, and lowest in the Suburban and Northeast areas. Eighty-two percent of the DCE respondents would consider CUH that is 20 percent smaller than their current homes and costs \$225 per square foot, if it is located in Southwest.

### Preference for Outdoor Space

(20% Smaller Home, \$225/sf Price Rate)





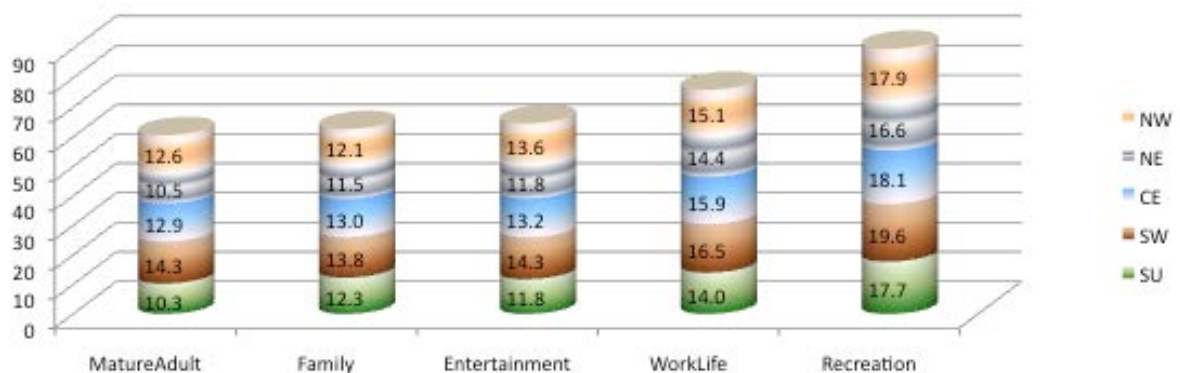
## Home Size

**Finding:** Demand among the 298 DCE respondents drops when home size (and therefore monthly payment) increases. Most people who are interested in CUH are sensitive to the idea of paying for more space than they need. This is consistent with the fact that an important component of demand for CUH is older couples and others who have reduced income and/or no longer need as much space.

## Amenity Packages (Themes)

**Finding:** The “recreation” package of amenities is the most popular, but differences in amenity popularity are relatively slight. (See figure below.) The recreation package consisted of a health club, walking/bike paths and a park within a 5 to 10 minutes walk. Next most popular is the “Work/Life” package. Its popularity rests, in part, on the fact that it includes a grocery store, which we know from the earlier point-allocation question is the most popular of all the amenities tested. The figures in the graph, below, are the percentages of the purchase decision represented by each of the amenity packages in each of the location areas. For example, for a potential home purchase in Northwest Anchorage, 17.9 percent of the purchase decision is attributable to the amenities package when the amenities package is recreational.

**Relative Popularity of Amenity Packages**



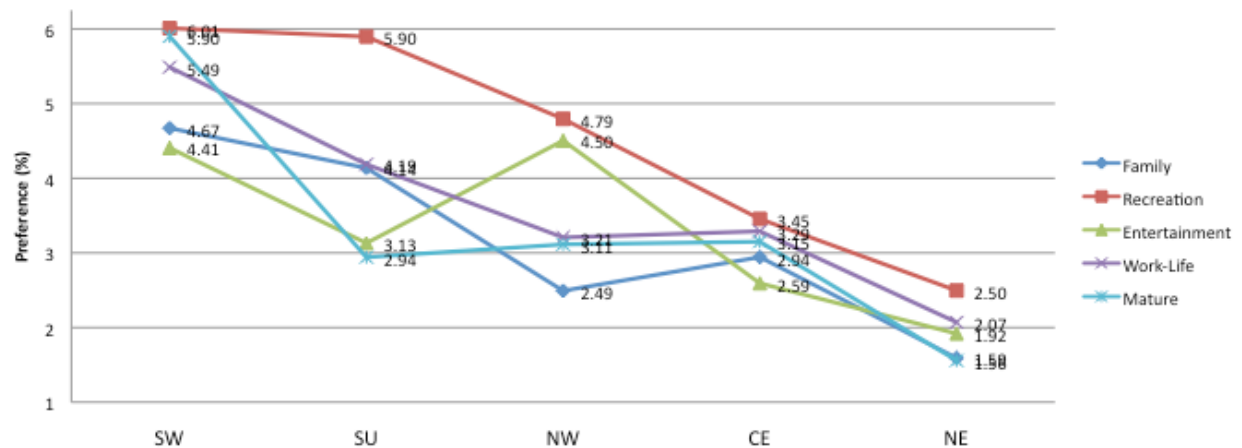
The graph on the next page shows how the popularity of different amenity themes changes depending on the location when other attributes (home size, yard size and cost) are held constant. Figures in the graph represent the percent of respondents in the DCE for whom each package is the first choice. For example, 6.01 percent of respondents preferred the combination “20 percent smaller home size + small yard + \$225 per square foot + Southwest + recreation amenity package” over all others presented.

As noted, the Recreation package — health club, walking/bike paths, park — is the most popular for all locations (the red line above all the others). In Central and Northeast Anchorage, preferences for the different amenity packages are similar. (The points on the graph for those areas are grouped tightly together.) In part, this reflects the fact that the markets in Central and Northeast are more price and size sensitive than those in other areas, and therefore less concerned with amenities.

In Suburban and Northwest Anchorage, the Recreation package is strongly favored, but in the latter, so is the Entertainment package — restaurants, shopping, nightclubs, and heater. The Entertainment package is of much less interest to those whose favorite location is Suburban, which is consistent with the type of lifestyle one would expect in a suburban Anchorage environment.

### Theme Preference Shares Across Locations

Fixed: -20% Home Size, Small Yard, \$225/sf



## Desired Neighborhood Amenities

An additional question about neighborhood amenities again shows that walking and bike paths are among the most popular. Amenities again tended to be closely ranked, however.

*Which of the following neighborhood amenities would you most want to be within a five or ten minute walk of your next home? (n=298)*

- School, park, walking/bike paths with paved sidewalks – 18 percent
- Health club, walking/bike paths, and park – 17 percent
- Galleries or museums, restaurants, grocery store, and medical/dental offices – 15 percent
- Restaurants, shopping, bars, and theatre – 14 percent
- Lots of employment opportunities, public transportation and a grocery store – 13 percent
- None of these – prefer a home with more outdoor space – 12 percent

# Technical Appendix 1: Segmented Utility Levels and Attribute Importances

## By 2010 Annual Household Income

Total Respondents by INCOME				
	Total	<\$50K	\$50K-\$100K	>\$100K
Total Respondents	298	109	102	87
		36.6%	34.2%	29.2%
Average Utility Values by INCOME				
Amenity Package	Total	<\$50K	\$50K-\$100K	>\$100K
Family	0.56	1.77	2.91	-3.73
Recreation	3.12	-0.48	5.41	4.93
Entertainment	-3.64	-5.66	-5.76	1.37
Work-Life	-1.08	5.37	-1.86	-8.24
Mature Adult	1.05	-1.00	-0.70	5.67
Home Size				
20% Less	18.68	25.37	14.18	15.58
10% Less	16.86	21.71	13.34	14.90
Current	13.07	13.54	14.12	11.24
10% More	-38.40	-44.97	-34.81	-34.38
20% More	-10.21	-15.65	-6.83	-7.35
Outdoor Space				
Medium Yard	41.86	39.88	47.39	37.84
Small Yard	27.62	27.59	29.68	25.23
Small Garden	8.40	10.21	4.90	10.24
Patio/Deck	-18.21	-18.96	-19.79	-15.43
None	-59.66	-58.72	-62.18	-57.89
Location				
Northwest	4.83	-1.44	7.29	9.81
Northeast	-19.44	-14.34	-19.87	-25.32
Central	3.32	3.76	8.58	-3.39
Southwest	23.48	18.58	28.00	24.34
Suburban	-12.20	-6.54	-24.01	-5.44
Price				
Low	30.66	36.44	29.52	24.77
Medium-Low	14.69	17.76	14.55	11.01
Medium	8.03	6.95	8.39	8.95
Medium-High	-19.35	-22.19	-19.28	-15.87
High	-34.04	-38.97	-33.18	-28.86
None (would not consider)	53.82	48.16	60.27	53.33
Average Importances by INCOME				
ATTRIBUTE	Total	<\$50K	\$50K-\$100K	>\$100K
Amenities	17.25	17.40	16.17	18.33
Size	19.30	20.24	19.41	17.99
Space	22.76	22.47	23.84	21.83
Location	25.10	22.59	24.80	28.60
Cost	15.59	17.29	15.77	13.26

## By Age

Total Respondents by AGE				
	Total	18-34	35-54	55+
Total Respondents	298	105	121	72
		35.2%	40.6%	24.2%
Average Utility Values by AGE				
Amenity Package	Total	18-34	35-54	55+
Family	0.56	5.46	-1.09	-3.83
Recreation	3.12	1.79	4.01	3.54
Entertainment	-3.64	-7.89	-0.57	-2.61
Work-Life	-1.08	4.32	-2.08	-7.26
Mature Adult	1.05	-3.69	-0.26	10.16
Home Size				
20% Less	18.68	13.84	17.83	27.17
10% Less	16.86	12.22	17.57	22.43
Current	13.07	13.22	13.67	11.82
10% More	-38.40	-33.62	-37.52	-46.84
20% More	-10.21	-5.66	-11.55	-14.59
Outdoor Space				
Medium Yard	41.86	45.69	38.99	41.07
Small Yard	27.62	29.57	28.65	23.02
Small Garden	8.40	6.44	9.78	8.95
Patio/Deck	-18.21	-19.90	-19.14	-14.20
None	-59.66	-61.82	-58.28	-58.84
Location				
Northwest	4.83	-0.14	7.56	7.49
Northeast	-19.44	-18.18	-21.71	-17.46
Central	3.32	9.39	-3.22	5.46
Southwest	23.48	25.27	23.56	20.75
Suburban	-12.20	-16.34	-6.20	-16.25
Price				
Low	30.66	30.36	28.55	34.65
Medium-Low	14.69	12.53	15.36	16.71
Medium	8.03	7.36	8.15	8.81
Medium-High	-19.35	-18.17	-18.39	-22.67
High	-34.04	-32.07	-33.68	-37.50
None (would not consider)	53.82	39.61	52.23	77.20
Average Importances by AGE				
ATTRIBUTE	Total	18-34	35-54	55+
Amenities	17.25	17.48	17.75	16.08
Size	19.30	18.68	19.56	19.75
Space	22.76	23.80	22.43	21.77
Location	25.10	24.32	24.86	26.65
Cost	15.59	15.71	15.39	15.76

## By Expected Changes in Household Size

Total Respondents by Expected Changes in Household Size				
	Total	Household Decrease	Household Increase	Household -No Change
Total Respondents	298	91	56	151
		30.5%	18.8%	50.7%
Average Utility Values by Expected Changes in Household Size				
Amenity Package	Total	Household Decrease	Household Increase	Household Same
Family	0.56	2.75	8.73	-3.80
Recreation	3.12	2.95	2.90	3.29
Entertainment	-3.64	-3.96	-8.28	-1.73
Work-Life	-1.08	-2.12	1.87	-1.54
Mature Adult	1.05	0.38	-5.22	3.78
Home Size				
20% Less	18.68	28.91	4.86	17.65
10% Less	16.86	23.07	6.70	16.88
Current	13.07	11.87	13.39	13.67
10% More	-38.40	-45.95	-28.64	-37.47
20% More	-10.21	-17.90	3.69	-10.73
Outdoor Space				
Medium Yard	41.86	37.81	51.13	40.85
Small Yard	27.62	27.22	33.36	25.73
Small Garden	8.40	9.29	4.53	9.30
Patio/Deck	-18.21	-16.28	-23.30	-17.49
None	-59.66	-58.04	-65.72	-58.39
Location				
Northwest	4.83	6.53	-5.59	7.68
Northeast	-19.44	-19.71	-20.36	-18.93
Central	3.32	0.89	5.10	4.13
Southwest	23.48	21.29	26.11	23.83
Suburban	-12.20	-8.99	-5.26	-16.71
Price				
Low	30.66	31.72	23.59	32.65
Medium-Low	14.69	16.63	13.88	13.82
Medium	8.03	8.43	8.97	7.44
Medium-High	-19.35	-22.17	-16.01	-18.89
High	-34.04	-34.61	-30.43	-35.02
None (would not consider)	53.82	57.19	71.80	45.12
Average Importances by Expected Changes in Household Size				
ATTRIBUTE	Total	Household Decrease	Household Increase	Household -No Change
Amenities	17.25	17.71	17.25	16.98
Size	19.30	20.18	18.30	19.14
Space	22.76	22.10	26.18	21.88
Location	25.10	24.34	22.75	26.43
Cost	15.59	15.66	15.51	15.58

## By Home Size (square footage)

Total Respondents by Home Size				
	Total	<1,401	1,401-2,100	2,101 +
Total Respondents	298	134	93	71
		45.0%	31.2%	23.8%
Average Utility Values by Home Size				
Amenity Package	Total	<1,401	1,401-2,100	2,101+
Family	0.56	0.83	1.08	-0.65
Recreation	3.12	4.44	2.43	1.52
Entertainment	-3.64	-5.00	-4.12	-0.45
Work-Life	-1.08	1.23	-3.18	-2.69
Mature Adult	1.05	-1.50	3.79	2.27
Home Size				
20% Less	18.68	10.48	24.52	26.51
10% Less	16.86	14.86	18.29	18.75
Current	13.07	14.22	13.37	10.50
10%/35% Price Shown	-38.40	-33.97	-41.65	-42.51
20% More	-10.21	-5.60	-14.53	-13.25
Outdoor Space				
Medium Yard	41.86	45.63	39.83	37.38
Small Yard	27.62	28.59	29.17	23.76
Small Garden	8.40	7.62	6.15	12.82
Patio/Deck	-18.21	-19.90	-17.81	-15.55
None	-59.66	-61.93	-57.34	-58.41
Location				
Northwest	4.83	4.21	4.17	6.88
Northeast	-19.44	-16.31	-14.52	-31.79
Central	3.32	9.08	-0.40	-2.68
Southwest	23.48	23.73	19.63	28.06
Suburban	-12.20	-20.72	-8.88	-0.47
Price				
Low	30.66	32.56	30.16	27.76
Medium-Low	14.69	13.98	14.43	16.38
Medium	8.03	7.44	9.01	7.84
Medium-High	-19.35	-18.85	-18.81	-20.99
High	-34.04	-35.13	-34.79	-30.99
None (would not consider)	53.82	42.27	51.92	78.09
Average Importances by Home Size				
ATTRIBUTE	Total	<1401	1401-2100	2101+
Amenities	17.25	18.02	17.09	16.03
Size	19.30	18.79	20.12	19.17
Space	22.76	23.97	21.63	21.94
Location	25.10	23.09	25.60	28.25
Cost	15.59	16.13	15.56	14.62

## **Technical Appendix 2: Programming Version of Online Questionnaire**

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## **Anchorage Housing Online Survey with Discrete Choice Exercise**

Welcome to our survey on housing needs in the Anchorage area.

McDowell Group is an Alaska-based research firm that has been helping community leaders, public agencies and private companies since 1972.

Thank you for your participation in this important study.

To start, we need to collect some demographic information to ensure our study sample represents the whole population.

### **S1. In which range is your age?**

	<b><u>Anchorage Pop %</u></b>
1. Under 18 (screen out)	
2. 18 – 24	
3. <u>25 – 34</u>	<u>38.5%</u>
4. 35 – 44	
5. <u>45 – 54</u>	<u>40.0%</u>
6. 55 – 64	
7. <u>65 or greater</u>	<u>21.5%</u>

### **S2. Using your best guess, what is your total household income before taxes?**

	<b><u>Pop %</u></b>
1. Less than \$25,000	
2. <u>\$25,000 - \$49,999</u>	<u>34.1%</u>
3. \$50,000 - \$74,999	
4. <u>\$75,000 - \$99,999</u>	<u>35.4%</u>
5. \$100,000 - \$149,999	
6. <u>\$150,000 or greater</u>	<u>30.5%</u>

### **S3. What is the zip code of your current residence? 995\_\_\_\_\_**

### **S4. Using your best guess, what size is your current home? Square Feet: \_\_\_\_\_ (if <500 skip to Size Information)**

Note: Leave blank if you're not sure or need help estimating the size of your home.

### **S5. Including yourself, how many people live in your household for at least nine months out of the year?**

1. # \_\_\_\_\_ (if "0" screen out; if "1", skip to S7)
2. Don't know (screen out)

### **S6. How many children under the age of 18 live in your household?**

1. # \_\_\_\_\_
2. Don't know (screen out)

### **S7. How is your household composition most likely to change in the next five years?**

1. One or more current members will move out of your home
2. One or more new members will move into your home (including new babies)
3. No change



## HOME-SIZE INFORMATION

Please review the range of typical sizes for homes in the Anchorage area then click the 'Next' button to re-estimate the size of your home.

Typical Apartment Sizes in Square Feet			
Bedrooms	Small	Medium	Large
1	600	700	800+
2	800	1000	1200+
3	1000	1300	1600+

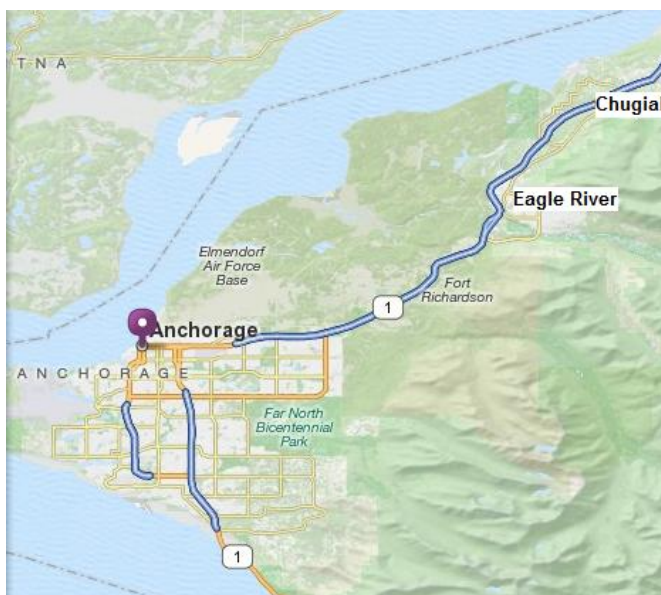
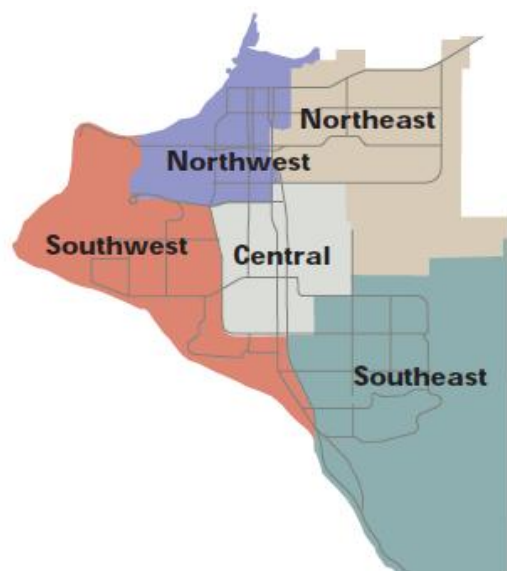
Duplex, Condominium & Townhouse Sizes (sq. ft.)			
Bedrooms	Small	Medium	Large
1	700	800	900+
2	900	1100	1300+
3	1100	1400	1700+

Detached House Sizes (sq. ft.)			
Bedrooms	Small	Medium	Large
2	1100	1300	1500+
3	1900	2400	2900+
4	2500	3000	3500+

### Market Sizing Questions – General Information

1. **Looking forward, which of the following types of events is most likely to trigger a move to your next home?** Please check the two most likely.
  1. Child(ren) moving out
  2. Divorce
  3. Change in household financial situation
  4. Job change
  5. Marriage
  6. New child(ren)
  7. Purchase home as investment
  8. Retirement
  9. Want a larger home
  10. Want to reduce commute time
  11. Want a second home
  12. Want a smaller home
  13. Want a more rural lifestyle
  14. Want a more urban lifestyle
  15. None – don't plan to ever move (screen out)
  16. Other – please specify: \_\_\_\_\_
2. **Using your best guess, when are you most likely to purchase or rent your next home?**
  1. < 1 year
  2. 1 – 2 years
  3. 3 – 5 years
  4. 6 – 10 years
  5. > 10 years
  6. Prefer to rent
  7. Don't know
  8. Never - don't plan to ever move again (screen out)

3. **Which of the following would you consider for your next type of home?** Select all that apply
1. A stand-alone, single family house on its own lot
  2. A single-family attached home such as a row house, townhouse, or zero lot line
  3. A duplex
  4. A condominium in a multi-unit complex
  5. An apartment in a multi-unit complex
  6. A mobile home in a mobile home park
  7. Other – please specify: \_\_\_\_\_
4. **Please refer to the maps below and then select the area of Anchorage where you would most prefer to live for your next home.**
1. Northwest
  2. Northeast
  3. Central
  4. Southeast
  5. Southwest
  6. Chugiak or Eagle River
  7. Don't want to live anywhere in the nearby Anchorage area. (skip to Compact Urban Housing)
  8. Other – please specify: \_\_\_\_\_ (skip to Compact Urban Housing)
  9. Don't know (skip to Compact Urban Housing)



[Skip if Q4>6]

5. **Which one neighborhood within [subarea from Q4] are you very likely to move to next?**

[Note: only neighborhoods from the subarea chosen in Q4 will be shown along with #52, 53]

<b><u>Northwest:</u></b>	<b><u>Northeast:</u></b>	<b><u>Central:</u></b>	<b><u>Southeast:</u></b>	<b><u>Southwest:</u></b>	<b><u>Chugiak/ Eagle River</u></b>
1. Turnagain (Old)	12. Mt View	22. Taku/Camp bell	26. Kempton Hills	37. Klatt	46. Eklutna
2. Spenard	13. Fairview	23. UMed/University	27. Huffman Hills	38. Bayshore	47. Chugiak
3. Government Hill	14. Nunaka Valley	24. College Village	28. Turnagain View	39. Southport	48. Birchwood
4. Downtown	15. College Gate	25. Rogers Park	29. Hillside/Upper Hillside	40. Sand Lake	49. Peters Creek
5. Bootlegger's Cove	16. Chester Valley		30. O'Malley	41. Jewel Lake	50. Eagle River
6. Inlet View	17. Chugach Foothills		31. Rabbit Creek	42. Kincaid	51. Eagle River Valley
7. Park Strip	18. Russian Jack		32. Potter Marsh	43. Oceanview	
8. South Addition	19. Airport Heights		33. Goldenvue	44. Shorecrest	
9. Forest Park	20. Bicentennial Park		34. Abbott Loop	45. Campbell Lake	
10. Woronzof	21. Wonder Park		35. Spring Hill		
11. Broadmoor Estates			36. Bear Valley		
52. Don't know					
53. No preference					

### **COMPACT URBAN HOUSING**

Please imagine that time in the future when you will next move. Regardless of when that is, please think about the following situation:

New construction of **Compact Urban Housing** is created in a few neighborhoods within Anchorage. This type of housing includes different structures (single-family detached houses, townhouses, and condominium apartments). Each type of structure comes in a wide selection of floor plans and interior designs. All these Compact Urban Housing options have one thing in common, however. They are all 10% to 20% smaller than equivalently priced homes in more suburban areas. Again, new Compact Urban Housing is available in a few areas within Anchorage. It has a wide selection of designs, but for the same price it provides less space than homes in more suburban locations.

6. **Assuming the Compact Urban Housing we just described was available when you next moved, that you could afford it, and that the design layout, style and number of bedrooms/bathrooms all met your requirements, would you consider living in some type of Compact Urban Housing if it were located in an area of Anchorage that you find appealing?**

1. Yes (skip to Q7a)
2. No (skip to Q7b)
3. Depends / Don't know (skip to Q7c)

**[Separate Page]**

7. **[Split]** Open-ended questions by above response to learn why, why not, and what it would take to convince more households to move to these locations.

a. **Why would you consider living in Compact Urban Housing?**

\_\_\_\_\_ [skip to Q8]

b. **Why would you not consider living in Compact Urban Housing?**

\_\_\_\_\_ [skip to Q8]

c. **What would make you consider living in Compact Urban Housing?**

\_\_\_\_\_

**[Separate Page]**

**MIXED-USED NEIGHBORHOODS**

This question will help us understand the mix of neighborhood amenities that are most appealing to Anchorage residents. Neighborhood amenities include things like parks & trails, public transportation, sidewalks, nearby schools, and a mix of businesses for dining, groceries, shopping, health/medical, entertainment (e.g. theatres, clubs, etc), and arts & culture.

8. **To help us understand how important each of the following neighborhood amenities are for you relative to the others, please allocate 100 points among these ten features.**

(For example, if all items were equally important you would enter 10 for every item.) Randomize list

	<u>Points</u>
1. Parks	_____
2. Schools	_____
3. Grocery store	_____
4. Health club & medical services	_____
5. Restaurants	_____
6. Public transportation	_____
7. Paved sidewalks	_____
8. Walking/running/biking paths	_____
9. Arts & culture	_____
10. Shopping & entertainment businesses (e.g. clothing stores, movie theatre, clubs, etc.)	_____
<b>Total:</b>	<b>100</b>

## COMPACT URBAN HOUSING IN MIXED-USE NEIGHBORHOODS



An important aspect of **Compact Urban Housing** is that it is often located in **Mixed-Use Neighborhoods**. These types of neighborhoods include a variety of housing options with a mix of amenities like parks & trails, public transportation, sidewalks, schools and a variety of businesses for dining, groceries, shopping, health/medical, entertainment (e.g. theatres, clubs, etc), and arts & culture.

In order to accommodate more families in or near Mixed-Use Neighborhoods, homes and lots may need to be smaller than in more spread-out areas. This Compact Urban Housing could include both attached apartment and townhouse homes as well as smaller detached single-family houses. The common element to all of these different types of homes is that they use less total space than many homes typical of more suburban or rural areas. A key characteristic of Compact Urban Housing is homes with indoor and outdoor living spaces that are 10 to 20 percent smaller than equivalently priced homes in more suburban locations.

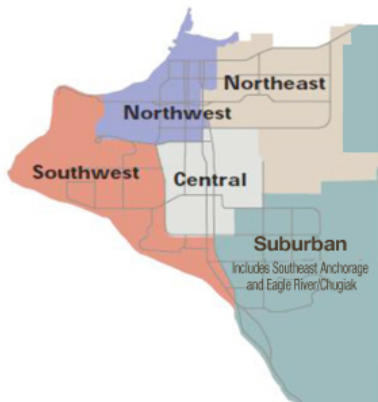
9. **Assuming that it was available when you next moved, that you could afford it, and that the design layout, style and number of bedrooms/bathrooms all met your requirements, would you consider living in some type of Compact Urban Housing if it were located in an area of Anchorage that you find appealing and it included the right mix of neighborhood amenities for your lifestyle?**

1. Yes
2. No (skip to Q16)
3. Don't know / Not sure

Note: the objective for the Q6-9 series is to show the increased 'potential' that compact urban housing could generate with the right mix of neighborhood amenities.

10. **In which subarea of Anchorage would Compact Urban Housing be most appealing to you?** Please refer to the map below to aide your selection. Randomize

1. Northeast
2. Northwest
3. Central
4. Southwest
5. Suburban (includes Southeast, Eagle River, Chugiak)



## HOME PREFERENCE EXERCISE Discrete Choice Exercise (includes 14 tasks)

The next section includes a set of 14 questions about important features that people consider when choosing a new home. In each question you will be asked to evaluate five different home and neighborhood packages and then select your most preferred one.

Before starting the exercise it's important that you first understand which home features are included and how the levels (or types) for each feature will vary. Carefully read each feature description below.

**Neighborhood Amenities:** each package includes one set of primary neighborhood amenities that will be within a 5 to 10 minute walk of the Compact Urban homes. Other secondary amenities may be available but they would be further away.

**Home Size:** the total amount of indoor space in square feet

**Private Outdoor Space:** different yard and patio options that are in addition to common areas that are shared by all residents of a neighborhood, complex or building.

**Location:** the area of Anchorage where the home is located

**Monthly Cost:** the amount that a homeowner or renter pays to live in the home. For homeowners this amount includes taxes plus insurance, and assumes an 80% loan-to-value mortgage amount at 6% annual percentage rate. For renters, this is the monthly rent and it does not include utilities.

Once you have read and understand the above home purchase features, please proceed to the exercise.

There are a lot of things to consider when choosing a new home. So, we want you to split the process into two stages. In the first, you evaluate homes based on the five features shown in this exercise. In the second stage, you would consider other things like bedrooms and bathrooms, interior and exterior home design, materials & craftsmanship. For the purpose of this exercise, only consider the five features shown when making your 'first-stage' home preference decisions.

### Among these five home and neighborhood packages, which would you select for your next home?

Click the button below your most preferred package; if none meet your requirements, then select the "none" choice.

Note: 14 randomly selected Discrete Choice Tasks are shown to each respondent based on the attribute levels in the below table.

# ATTRIBUTES	Level 1	Level 2	Level 3	Level 4	Level 5
<b>Neighborhood Amenities:</b> Listed amenities within 5-10 minute walk of home	<b>Neighborhood with:</b> school, park, walking/bike paths	<b>Neighborhood with:</b> health club, walking/ bike paths, park	<b>Neighborhood with:</b> restaurants, shopping, bar, theatre	<b>Neighborhood with:</b> most employment opportunities, public transportation, grocery store	<b>Neighborhood with:</b> gallery/museum, restaurants, grocery store, medical/dental offices
<b>Home Size</b> (in square feet) % of current home size	20% Smaller	10% Smaller	Current size (Question #S4)	10% Larger	20% Larger
<b>Private Outdoor Space</b> (in addition to commons)	Medium yard - grass and/or garden with patio	Small yard - grass and/or garden with patio	Small garden with patio	Patio or deck only	No private outdoor space
<b>Location:</b>	Northwest	Northeast	Central	Southwest	Suburban Anchorage
<b>Monthly Cost:</b>	Low (\$175/SqFt)	Med-low (\$200/SqFt)	Med (\$225/SqFt)	Med-High (\$250/SqFt)	High (\$275/SqFt)

Note: Monthly cost calculation based on 80% loan-to-value mortgage at 6% APR using the range of +/- 20% of current home size at above \$/sf rates.

**Validation Questions** (used to compare against conjoint preference share findings)

11. **Please tell us how important each of the following home features is relative to the others. Please allocate 100 points among these five features.** (For example, if all items were equally important you would enter 20 for every item.) Randomize list

	<u>Points</u>
1. Overall size of home (square footage)	_____
2. Location/subarea of Anchorage	_____
3. Amount and type of private outdoor space	_____
4. Mix of neighborhood amenities	_____
5. Price / monthly cost	_____
<b>Total</b>	<b>100</b>

12. **How many bedrooms do you need for your next home?**

- 1 bedroom
- 2 bedrooms
- 3 bedrooms
- 4 bedrooms
- 5 or more bedrooms

13. **How many indoor or off-street parking spaces do you need for your next home?**

- 0 spaces
- 1 space
- 1.5 spaces
- 2 spaces
- 2.5 spaces
- 3 spaces
- Other – please specify: \_\_\_\_\_

Note: spaces are not designed for RVs or boats

For your next move, assume you have found the perfect Compact Urban Home. It has the right layout, number of bedrooms and bathrooms, design features, materials, and structure type and is located in your ideal location within Anchorage. It is also

- [% 20% less than QS4 value %] square feet,
- costs about \$ [% X %]/month, and
- has a small garden with patio for private space.

14. **Which of the following types of neighborhood amenities would you most want to be within a 5-10 minute walk of this new home?** (Randomize List)

- School, park, walking/bike paths with paved sidewalks
- Health club, walking/ bike paths, and park
- Restaurants, shopping, bar, and theatre
- Lots of employment opportunities, public transportation, and a grocery store
- Galleries or museum, restaurants, grocery store, and medical/dental offices
- None of these – prefer a neighborhood with different amenities. Please specify: \_\_\_\_\_
- None of these – prefer a home with more outdoor space
- None of these – prefer a home with more indoor space.

Note: X is the monthly cost based on a size 20% smaller than the square footage of their current home (QS4), a \$225/sf cost rate, and an 80% loan-to-value mortgage at 6% APR interest rate.

- 14b. **For the Compact Urban Home described above with your most preferred neighborhood amenity package would you say that [% 20% less than QS4 value %] square feet would be ...**

- too small for my household.
- a little small for my household, but acceptable.
- about right for my household.
- a little large for my household, but acceptable.
- too large for my household.





15. Sometimes people change their minds after becoming aware of new information. We're now going to re-ask a question that appeared before we told you about Mixed-Use Neighborhoods.

**Assuming all of the following housing options were available in attractive, Mixed-Use Neighborhoods at the time of your next move, which of the following would you consider for your next type of home?**

Select all that apply

1. A stand-alone, single family house on its own lot
2. A single-family attached home such as a row house, townhouse, or zero lot line
3. A duplex
4. A condominium in a multi-unit complex
5. An apartment in a multi-unit complex
6. A mobile home in a mobile home park
7. Other – please specify: \_\_\_\_\_

## TRANSPORTATION

16. **Do you commute regularly to work or for some other reason?**
1. Yes
  2. No (skip to Q20)
17. **How many times per week do you make your regular commute?** Times: \_\_\_\_\_
18. **On average, how many minutes does it take to make your regular commute one way?** Minutes: \_\_\_\_\_
19. **What mode of transportation do you typically use to make your regular commute?**
1. Walk
  2. Car
  3. Bike
  4. Bus
  5. Other – please specify: \_\_\_\_\_
20. **How many times per month do you currently use People Mover buses?**
1. 0 times
  2. 1 to 3 times
  3. 4 to 10 times
  4. more than 10 times per month)
21. **If there were regular, affordable public transportation from your neighborhood to the other major areas of Anchorage, including Eagle River and Chugiak, how many times per month would you use it?**
1. 0 times
  2. 1 to 3 times
  3. 4 to 10 times
  4. more than 10 times per month)
22. **What part of Anchorage would most often be your destination?** \_\_\_\_\_



## ADDITIONAL DEMOGRAPHICS

1. **Which is your gender?**
  1. Male
  2. Female
  
2. **What racial or ethnic group do you consider yourself?** Select all that apply
  1. White
  2. African American
  3. Hispanic
  4. Alaska Native / American Indian
  5. Asian / Pacific Islander
  6. Two or more races
  7. Other – please specify: \_\_\_\_\_
  
3. **How many bedrooms are in your current home?** \_\_\_\_\_
  
4. **Do you own or rent your current home?**
  1. Rent
  2. Own
  3. Other – please specify: \_\_\_\_\_
  
5. **What is the highest level of education you have completed so far?**
  1. Less than high school
  2. High school or GED
  3. Some college
  4. One year or more of technical certification
  5. Associates or 2-year degree
  6. Bachelors or 4-year degree
  7. Masters or Doctorate