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Walkable Communities Surveys

by Jeffrey Spivak

June 14, 2011

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Walkable communities and some of their smart growth characteristics appear to be growing in popularity among the general public and even among some segments of prospective homebuyers, according to a series of recent surveys.

Consumer surveys published in recent months by the National Association of Realtors, Smart Growth America, and real estate advisory firm Robert Charles Lesser & Co. (RCLCO) show slightly rising preferences for mixed-use neighborhoods, where residents can walk to stores or restaurants or just take a walk. And this preference appears to be most pronounced among the giant generation of emerging first-time homebuyers, generation Y—those currently between the ages of 17 and 35.

But the survey results also confirm some of the challenges that smart-growth developments still face—namely, even stronger preferences for large-lot suburban living that gives residents the comfort of privacy.

"Our poll shows that there are a lot of benefits people see in a mixed-use, walkable community, but that their buying decision comes down to trade-offs," says Joe Molinaro, managing director of smart growth and housing opportunity at the Realtors' association.

The Realtors' survey is the most significant of the new studies because some responses can be compared to those that appeared in a similar survey done in 2004. Both surveys of 1,100 to 2,000 U.S. adults were conducted by Belden Russonello & Stewart, a Washington, D.C.-based research firm, and attempted to gauge Americans' preferences about the types of communities they live in and want to live in. One theme that emerged from the 2011 survey was an increasing interest in walkability:

- When asked to choose between two different community descriptions—one a typical subdivision of only single-family homes, with no sidewalks and with shopping and schools a few miles away, versus a smart growth-type community with a mix of housing sizes, sidewalks, and shops and restaurants within a few blocks' walk—a majority of respondents chose the smart growth community, with the smart growth preference increasing slightly from 55 percent in 2004 to 56 percent in 2011.
- Interest in specifically living within walking distance of stores, restaurants, and other places in a community increased from 51 percent of respondents in 2004 to 66 percent in 2011.
- The importance of "sidewalks and places to take walks" also rose from 72 percent of respondents in 2004 to 77 percent in 2011.

This growing interest in walkable neighborhoods does not surprise Rudy Kadlub, chairman of ULI's Residential Neighborhood Development Council (Blue Flight) and chief executive of Costa Pacific Communities, a Portland, Oregon-based developer of new urbanist, transit-oriented housing projects.

"We have found that homebuyers are willing to pay 20 percent to 30 percent more for homes in our transit-oriented walkable communities," Kadlub says. "People who live in our walkable communities feel they have more friends than in previous communities where they have lived, and they also feel safer, because the neighborhood is friendlier and more active, with more people on the streets and in the parks and open spaces."

Other recent consumer surveys suggest that some prospective homebuyers will be increasingly considering walkability when they make their next move.

In Smart Growth America's survey, which polled 1,200 people in late 2010, 58 percent of respondents said that being able to walk to stores or restaurants would have a strong impact on their next decision about where to live. That level was significantly higher than the 20 percent of respondents who reported considering walkability in their last move.

Similarly, in RCLCO's survey of generation Y, two-thirds of respondents said living in a walkable community was important, and one-third of respondents even indicated they would be willing to pay more for the opportunity to walk to work, shops, or entertainment. In both cases, the interest levels were higher for generation Y than for the cohort right before it, generation X.

"Consumer preferences, especially among Gen Y and smaller households, are increasing for smart growth environs," Shyam Kannan, RCLCO's director of research and development, said in presenting the company's research last year.

In addition, the Realtors' survey further analyzed the demographic segments interested in walkable communities. The Realtors determined the most likely potential buyers were women under 40 years old, African American households, and people with postgraduate levels of education. These also happen to be some of the demographic groups most interested in buying a home in the next three years, according to the Realtors' survey.

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Interestingly, though, the development of new walkable communities may be more promising in the suburbs than in cities.

The Realtors' survey found that city living had limited appeal: Just 19 percent of respondents said an urban city or downtown was their preferred community type. The level was higher for generation Y in RCLCO's survey. Yet, the Realtors' survey respondents overwhelmingly favored single-family detached homes (80 percent), privacy from neighbors (87 percent), and larger lots (at least 56 percent), even if those characteristics also meant more driving and longer commutes.

This suggests that walkable communities would sell better in suburbia. "That's where the stronger market is going to be," says Molinaro. "More Americans want to live in the suburbs than in cities... so if there is demand for walkable communities, it's probably going to be met more in the suburbs than in central cities."

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Mr. Gregory L. Cory - San Francisco, CA wrote - on June 21, 2011 at 12:37 PM


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Adding to Patrick's comments on virtually every survey I've ever seen/conducted on buyer preferences and important purchase considerations, walking trails/bike trails/ etc., have always been far more important than golf, tennis, or most other typical MP community amenities. The sense of body heat and activity is also one of the reasons transit oriented development have been so successful.

Mr. Patrick Mason, BSBA - Columbia, SC wrote - on June 14, 2011 at 2:22 PM


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Results of our 26-question, Carolina Lifestyle Survey™, that has polled 100,000 families since 1986 (4,000 in 2010) has always documented that 16 listed recreational preferences are lead by "walking paths". Charles Fraser, with his Sea Pines was amongst the very first to dedicate trails throughout the project. Today, residential communities of any significant size all have them built into the plan.



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