ANDERSON ECONOMIC DEVELOPMENT COMMITTEE
HOUSING SUBCOMMITTEE SURVEY SUMMARY
APRIL 27, 2016

As part of its efforts to assess the background of housing choices in Anderson Township, and to identify opportunities and "fits", both geographically and with regards to housing type, the housing subcommittee of the Anderson Township Economic Development Committee worked with staff to distribute a survey to Anderson Area real estate agents during March and April 2016.

A link to this online survey (conducted through Survey Monkey) was sent to the managers of the seven real estate offices in our community and the survey was identical to that administered by the Township in May 2013 and August/September 2014. In summary, 71 agents participated this year (compared with 52 in 2014, and 24 in 2013). The full results are attached, the highlights of this, and comparison, where applicable, to the fall 2014 and spring 2013 results, are presented below.

Q1 – Reasons Moving Into Township

A summary of the responses for each reason, from the spring of 2013, fall of 2014, and this most recent survey, appears below (most popular reason bolded):

REASON	**2013**	**2014**	**2016**
Employment Opportunities	29.2%	40.4%	22.4%
Family & Friends	50.0%	58.9%	52.1%
Health Care Offerings	8.3%	13.5%	9.9%
Housing Options/Pricing	33.3%	50.0%	47.9%
Natural Environment	33.3%	13.5%	14.1%
Nearby Amenities (Shopping, Attract., etc.)	54.2%	28.9%	33.8%
Parks & Recreation	62.5%	51.9%	50.7%
Public Schools	**83.3%**	**94.2%**	**95.8%**
Safety Services (Police, Fire & Rescue, etc.)	33.3%	23.1%	21.1%
Other	16.7%	N/A	N/A

- Schools, family, parks and housing options ranked high, as they did on prior surveys. The results for most areas remained fairly consistent with 2014 figures, with the exception of a steep decline for employment opportunities.
- The average number of features marked by each respondent declined, to an average of 3.5 reasons from 4.3 reasons.

Q2 – Reasons Moving From Township
A summary of the responses for each reason, from the spring of 2013, fall of 2014, and this most recent survey, appears below (most popular reason bolded):

REASON	2013	2014	2016
Alternate Housing Options	33.3%	44.2%	38.1%
Cost of Living (Home Prices, Taxes, etc.)	**70.8%**	**65.4%**	**62.0%**
Employment Opportunities	33.3%	44.2%	39.4%
Nearby Amenities (Shopping, Attract., etc.)	8.3%	19.2%	11.3%
New Housing Options	45.8%	42.3%	36.6%
Public Schools	8.3%	11.5%	4.2%
Safety Services (Police, Fire & Rescue, etc.)	4.2%	1.9%	1.4%
Other	16.7%	N/A	N/A

- Cost of living, alternative housing options, employment opportunities, and new housing options were high, with results similar to 2014.
- The percent of responses for housing and schools decreased from 2014.
- The average number of features marked by each respondent declined, to an average of 1.9 reasons from 2.28 reasons.

Q3 – Additional Housing Options Needed?

- Percent indicating "Yes"
  - Spring 2013 – 57.9%
  - Fall 2014 – 76.9%
  - Spring 2016 – 77.5%
- "Yes" was very similar to 2014, and was a large increase from 2013. Note, in 2013, "Other" was an option, but the figures above remove those responses and "Yes" reflects the percent of only those who marked "Yes" or "No".

Q4 – Should Township Permit Increased Density/Flexibility?

- Percent indicating "Yes"
  - Spring 2013 – 47.7%
  - Fall 2014 – 65.4%
  - Spring 2016 – 57.8%
- "Yes" decreased from 2014, after increasing from 2013. Note, in 2013, "Other" was an option, but the figures above remove those responses and "Yes" reflects the percent of only those who marked "Yes" or "No".

Q5 – Do you think you can market existing homes with new options/alternatives adjacent?

- Percent indicating "Yes"
  - Spring 2013 – 71.4%
  - Fall 2014 – 71.2%
  - Spring 2016 – 71.0%
- "Yes" has remained very consistent through the three survey periods. Note, in 2013, "Other" was an option, but the figures above remove those responses and "Yes" reflects the percent of only those who marked "Yes" or "No".

Q6 – Opinion regarding controversy to new options
A summary of the responses for each reason, from the spring of 2013, fall of 2014, and this most recent survey, appears below (opinions of increase bolded):

OPINION	2013	2014	2016
Additional Dev. Create Harmful Traffic	**37.5%**	**36.5%**	**39.4%**
New Housing Lowers Surrounding Values	20.8%	28.9%	21.1%
Loss of Open Space is Negative Impact	**45.8%**	**46.2%**	**50.7%**
Acceptable Development Must Mirror Existing	16.7%	21.2%	15.5%
Increase in Density Will Not Be Acceptable	25.0%	30.8%	28.2%
Opposition Intensified by Misunderstanding	29.2%	48.1%	42.3%
None	4.2%	13.5%	12.7%
Other	20.8%	N/A	N/A

- Opposition intensified by misunderstanding, potential loss of open space, and harmful traffic impacts had the highest rates of agreement
- All percentages were fairly similar to last year, but decreases were seen in new housing lowers surrounding values, acceptable development must mirror, and opposition intensified by misunderstanding.
- Creating harmful traffic and loss of open space witnessed slight increases.

Q7 – Features to consider in mitigating impacts
A summary of the responses for each feature, from the spring of 2013, fall of 2014, and this most recent survey, appears below (popular feature bolded):

FEATURE	2013	2014	2016
Consideration of Security & Privacy	45.8%	50.0%	47.9%
Provision for Open Space & Buffers	**79.2%**	**84.6%**	**83.1%**
Minimize Storm Water Runoff	45.8%	51.9%	36.6%
Respect for Fabric of Existing Neighborhoods	58.3%	71.2%	63.4%
Promote Energy & Green Building Design	41.7%	32.7%	23.9%
Creation & Adherence to Design Guidelines	45.8%	61.4%	47.9%
None	0.0%	1.9%	1.4%
Other	8.3%	N/A	N/A

- Open space and respecting fabric of existing neighborhoods were highest, but both decreased from 2014.
- Most areas increased from 2013 to 2014; however, all areas, in fact, had decreases since 2014, some fairly large. These were especially seen in minimizing storm water runoff and creation and adherence to design guidelines.

Q8 – Q22 – Housing Types

A summary of the average rating for the various housing types, from the Spring of 2013, Fall of 2014, and this most recent survey, appears below (the types that are growing in popularity are bolded):

QUESTION / TYPE	2013	2014	2016
Q8 - Narrow Lot Houses – Garage at Rear	1.64	2.00	2.00
Q9 - Narrow Lot Houses	1.83	1.90	2.15
Q10 - Cottage Clusters	2.79	2.82	2.71
Q11 – Traditional Townhomes	2.04	2.02	2.14
Q12 – Contemporary Townhomes	1.74	1.86	2.02
Q13 – Traditional Façade w/ Ped. Access	**1.41**	**1.86**	**2.06**
Q14 – Shared Court Townhouses	**1.30**	**1.66**	**1.80**
Q15 – Duplex Front Facing Garages	1.75	1.62	1.77
Q16 – Duplex Rear Facing Garage	1.96	1.84	1.98
Q17 – Shared Court SF Cluster	2.30	2.44	2.33
Q18 – SF Common Green	2.73	2.80	2.88
Q19 – SF Cluster w/ Courtyard	**2.23**	**2.46**	**2.70**
Q20 – Mixed Use Upper Residential	**1.39**	**1.60**	**2.23**
Q21 – Garage Conversion	1.87	1.36	1.62
Q22 – Rear Yard Apartment Infill	1.91	1.52	1.94

- A higher rating has consistently been seen for single family with common green (Q18), single family cluster with courtyards (Q19), cottage cluster (Q10), and shared court with single family cluster (Q17), hence the support for “single family” descriptions.
- Most types have seen an increase in support, namely traditional façade with pedestrian access (Q13), shared court townhouse (Q14), single family cluster with courtyard (Q19), and mixed use upper residential (Q20).
- Support for garage conversation and rear yard infill declined sharply from 2013 to 2014, rebounding somewhat, but are still pretty low compared to other types.

Q23 – Design Issues or Priorities
A summary of the responses for each design issue or priority, from the spring of 2013, fall of 2014, and this most recent survey, appears below (popular features are bolded):

FEATURE	2013	2014	2016
Pedestrian Friendly Street Frontages	**71.4%**	**77.1%**	**80.3%**
Provision of Off Street Parking	**81.0%**	**79.2%**	**80.3%**
Compatible Building Scale & Patterns	52.4%	66.7%	50.0%
Inclusion of Architectural Features	57.1%	68.8%	59.1%
Minimizing Impacts on Neighboring Property	**66.7%**	**83.3%**	**77.3%**
Provision of Usable Open Space	61.9%	70.8%	57.6%
Minimizing Environmental Impacts	42.9%	68.8%	54.6%
Keeping Construction Costs Low	28.6%	33.3%	27.8%
Connectivity to Adjoining Developments	28.6%	35.4%	30.3%

- Adequate off street parking, pedestrian friendly street frontages, and minimizing impacts on neighboring properties
- Pedestrian street frontages and provision of off street parking remained high and increased slightly, but all others declined, some sharply.