

COMMUNITY PREFERENCE SURVEY

*What's important to
central Indiana residents?*

EXECUTIVE SUMMARY

MARCH 2013



March, 2013

In late 2012, the Metropolitan Indianapolis Board of REALTORS® (MIBOR) and the Indianapolis Metropolitan Planning Organization (MPO) teamed up to conduct a region-wide study to discover what factors central Indiana residents consider most important when making their housing decisions, what their future aspirations are related to housing and how satisfied they are with their communities and overall quality of life.

To our knowledge, this is the largest survey of its kind conducted in central Indiana and the only to mirror the comparable national survey conducted in 2011 by the National Association of REALTORS® (NAR). Researchers spoke to just over 1,500 central Indiana residents in Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan and Shelby counties.

We feel this is an important benchmark for central Indiana's future growth, both in terms of the types of communities our growing population wants and the community amenities and assets we value.

Quality of life is defined in many ways. This survey helps provide a standard by which we can define and measure quality of life. The collective goal of everyone – elected officials, planners, business interests – should be to look for ways to keep satisfaction with the components that make up quality of life high. We are encouraged by the overall findings. They provide a springboard for much thoughtful discussion.

Further demographic and county-specific results are available upon request.

Sincerely,



Steve Sullivan
CEO
Metropolitan Indianapolis Board of REALTORS®



Sean Northup
Assistant Executive Director
Indianapolis Metropolitan Planning Organization

INTRODUCTION

Central Indiana residents are happier than the average American with their quality of life. Although many say they'd prefer a different type of community, overall ratings for quality of life are so strong that they remain extremely satisfied. These strong numbers – indicating a stable, happy population – lay the foundation for solid economic growth for the region.

What drives these high ratings and what leads people to make specific housing decisions? Access to work, entertainment and quality schools; the neighborhood culture and amenities; the amenities of the house; affordability; and sense of place all play a role. It's a question real estate professionals, city planners, elected leaders and developers must better understand in order to meet current and future resident needs.

In order to tap into the answers, the Metropolitan Indianapolis Board of REALTORS® (MIBOR) and the Indianapolis Metropolitan Planning Organization (MPO) embarked on a region-wide study to discover what factors central Indiana residents consider most important when making their housing decisions, what their future aspirations are related to housing and how satisfied they are with their communities and overall quality of life.

When asked about overall quality of life satisfaction, the study found that central Indiana residents are satisfied with the amenities and qualities of their communities. Moreover, central Indiana residents are less likely than Americans as a whole to report that their quality of life has decreased over the last three years. When asked about satisfaction of specific amenities and community assets, regional and demographic differences arose. Additionally, a striking gap between where people currently live and where they want to live became evident.

The survey findings serve as a platform for the future. A central question becomes: How do we retain and build upon the high level of satisfaction felt among residents while accommodating the inevitable changes that a metro area of Indianapolis' size will encounter? U.S. Census Bureau statistics predict the Indianapolis Metropolitan Statistical Area (MSA) will grow by 35 percent by 2040.

- How should residents, policy makers and real estate industry professionals plan for this growth while taking into account what people want to retain about their communities and housing lifestyles?
- Equally important, how will attitudes and behaviors need to adjust to accommodate what is ultimately best for a growing region to thrive?

METHODOLOGY

The following observations are based on a telephone survey among 1,502 central Indiana residents. Respondents were selected based on random digit dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan and Shelby. Interviews were conducted by professionally trained callers during the evenings of Dec. 12 through Dec. 19, 2012. Counties were sampled to be proportionally representative of the region as a whole, with an oversampling in smaller counties to ensure sufficient representation. Results were weighted against figures from the 2010 Decennial Census to ensure proportional representation with respect to county, age, income and gender. Based on this sample size and weighting, one can say with 95 percent confidence that the maximum error attributable to sampling is +/- 3.7 percent. The margin of error is larger for results based on subsets of respondents, such as those living within a particular county. In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings. Specially, respondents self-identified their community as a "rural" or "suburban". Surveyors did not provide a uniform definition.

KEY FINDINGS

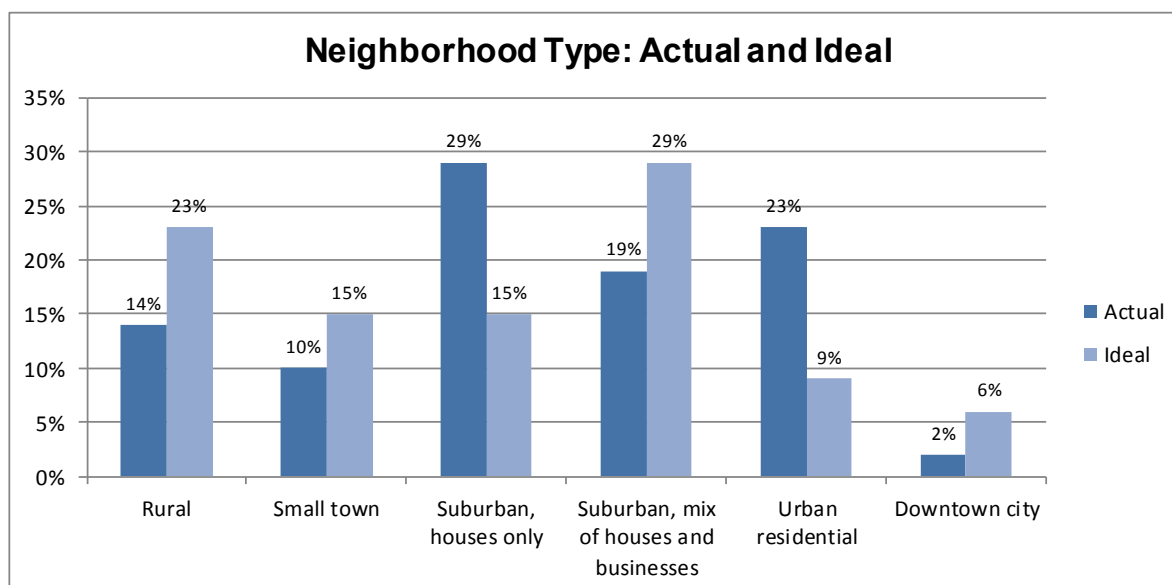
- **Fewer than half of all residents are living in their preferred type of community.** When respondents were asked about the location in which they currently live (rural, small town, downtown city, etc.) and subsequently asked about their ideal location, just 43 percent of respondents gave the same response to both questions.
- **Demand is high for downtown living, small town settings, rural living and suburban neighborhoods that have a mix of housing and business.** When asked about ideal community, the biggest discrepancy between where people currently live and would ideally live were found in these community types.
- **Even in the last three years of tough economic times, central Indiana residents express a notably more positive reaction to quality of life than Americans as a whole.** According to a similarly constructed National Association of REALTORS® 2011 Community Preference Survey, 35 percent of adults nationwide report that their quality of life has decreased over the last three years; just 22 percent of central Indiana residents reported the same.
- **Far and away, the safety of the community and level of crime are the most important considerations for central Indiana residents when deciding where to live.** When given a list of attributes to rank, respondents ranked safety, schools and affordability as their top three.

SUMMARY OF FINDINGS

Ideal Community

In total, fewer than half of all residents are living in their preferred type of community. As noted, the ideal outpaces the actual in rural settings, small towns and downtown communities as well as suburban neighborhoods where a mix of housing and businesses exist.

The largest gaps exist in the urban residential and suburban houses only communities. This may suggest further study to define those types of communities and uncover the amenities or characteristics driving the low ideal ratings. This may raise the question about whether we are providing the right balance of housing and neighborhood type to meet resident's current and future needs.



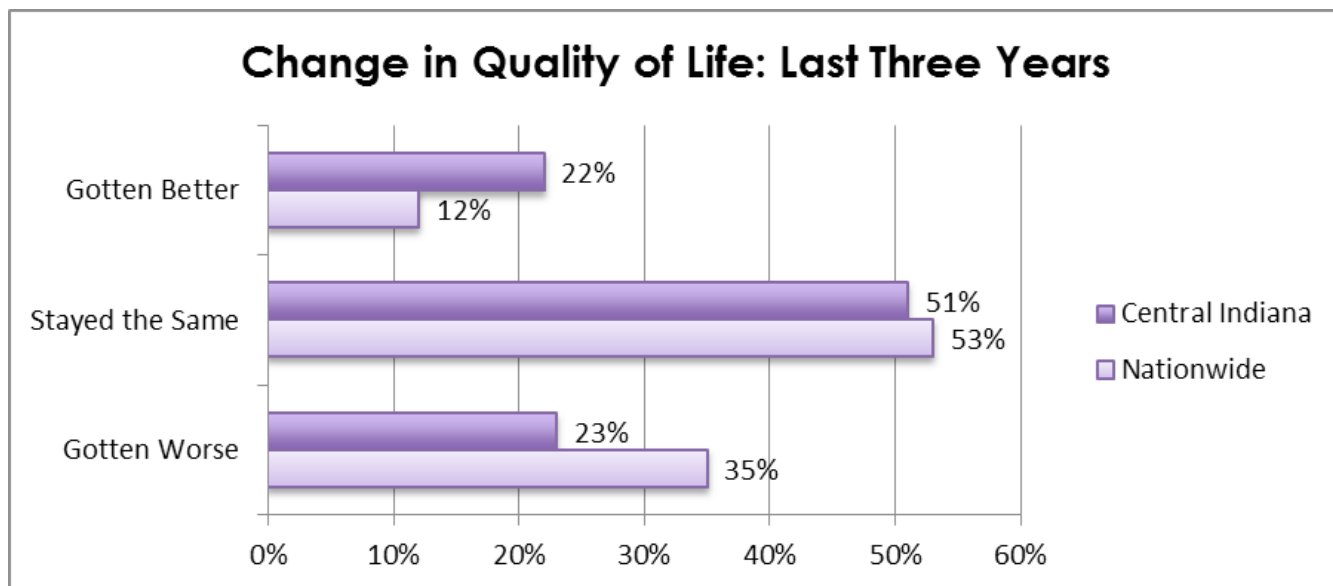
Quality of Life

Most central Indiana residents report little change in their quality of life over the past three years. While 22 percent of respondents said their quality of life has gotten better, and 23 percent said it has gotten worse, a majority (51 percent) reported that things have remained the same. Just 13 percent said it has gotten either “much better” or “much worse” (6 percent and 7 percent, respectively).

**Thinking about the community in which you live,
do you think the quality of life has gotten better,
gotten worse or stayed the same in the past three years?**

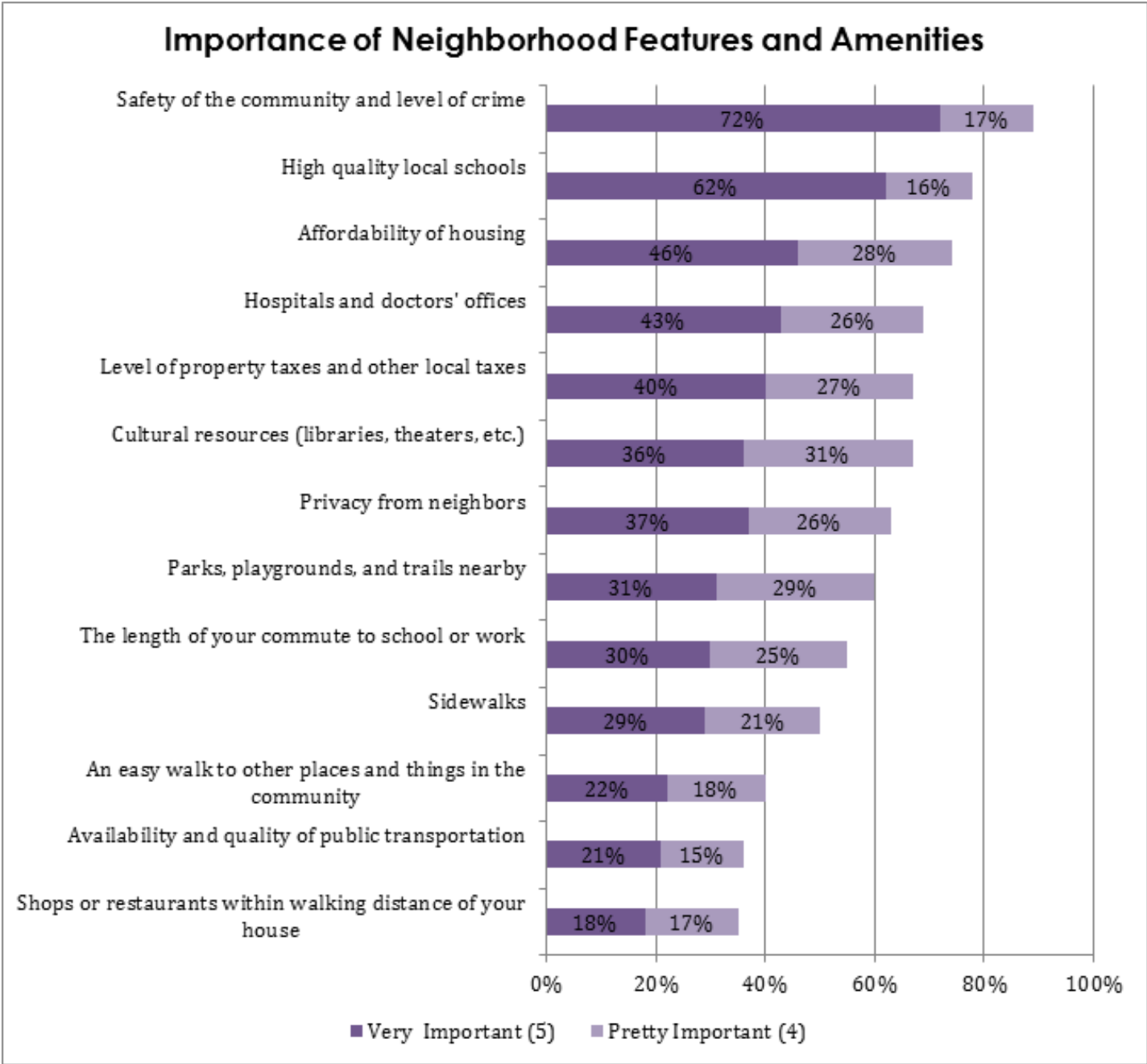
Much better	6%
Somewhat better	16%
Stayed the same	51%
Somewhat worse	16%
Much worse	7%
Unsure	4%

Even in the last three years of tough economic times, central Indiana residents express a notably more positive reaction to quality of life than Americans as a whole.



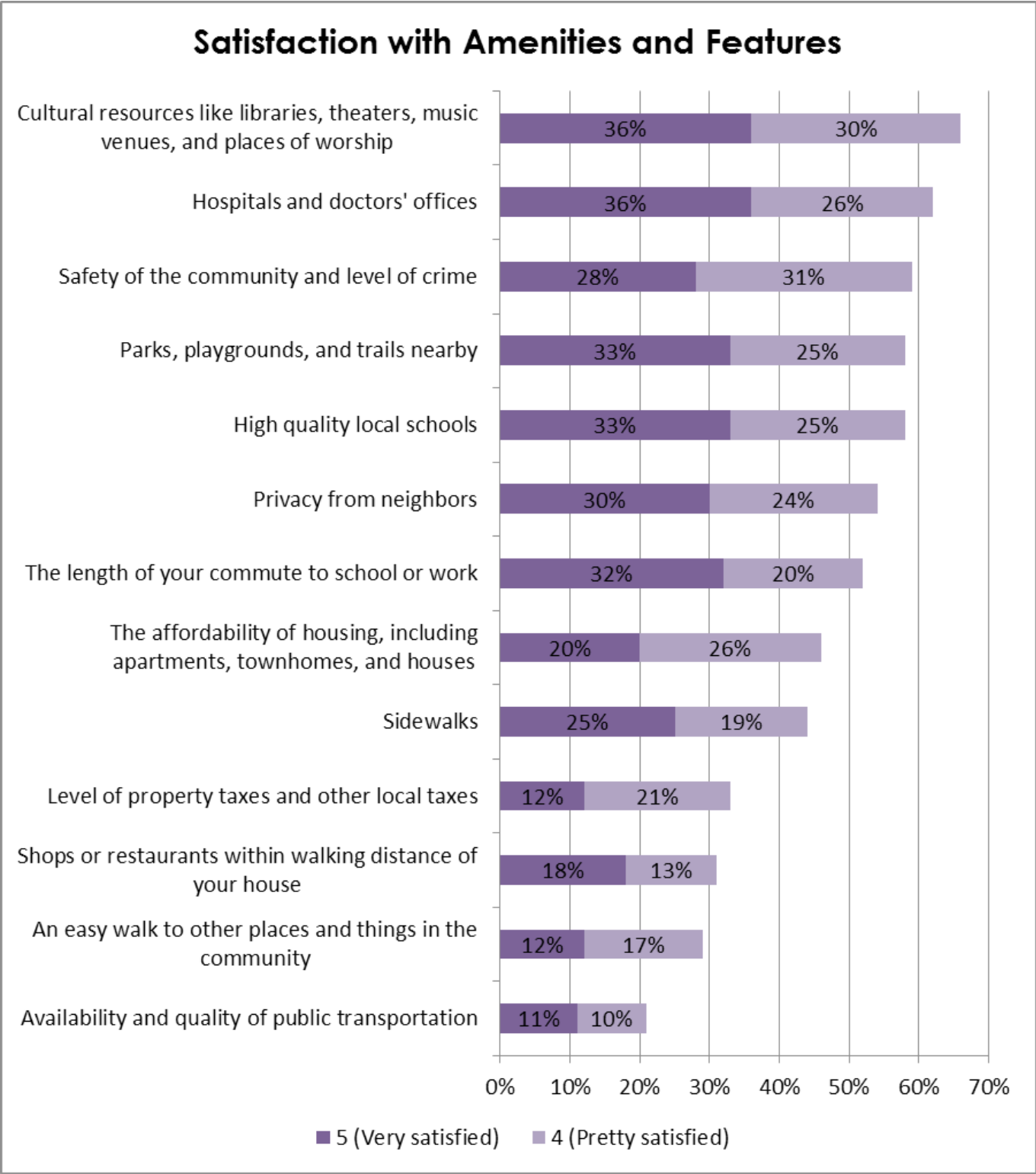
Importance of Neighborhood Qualities

Respondents were asked to rate 13 neighborhood features and qualities on a scale from one to five, with five indicating “very important” and one being “not important at all” when deciding where to live. Far and away, “safety of the community and level of crime” was rated the most important consideration. Nearly three-quarters of respondents (72 percent) rated crime and public safety as “5” (most important), with an average rating of 4.5.



Satisfaction of Neighborhood Qualities

On the whole, central Indiana residents report high satisfaction with the features of their communities. Respondents were asked to rate a series of 13 amenities, features and activities on a scale of one to five, with one being “very dissatisfied,” three being “neutral” and five being “very satisfied.” Respondents reported highest satisfaction with cultural resources nearby; the availability and quality of hospitals and doctors; and parks, playgrounds and trails nearby.



CONCLUSION

This study demonstrates that, generally speaking, central Indiana residents are happy and relatively satisfied with the housing and community options available to them. The central discussion then becomes: How do we retain, and build upon, a high level of satisfaction while positioning ourselves as a region that grows in ways that attracts and retains residents?

This data can be critically important for planners, policy makers and private developers, all of whom are concerned with meeting the housing needs and wants of a growing and generationally diverse audience. Clearly, one size doesn't fit all in our region, as there are diverse areas of importance and satisfaction among counties and communities. We point to that as a positive attribute in that it highlights the variety of options across our region in regard to housing and communities and their amenities.

Most notably, the results reveal a sizable satisfaction gap between where people currently live and where they would ideally chose to live. This gap needs to be addressed. We need to strike the right balance of new housing, developments and community amenities going forward to meet desires and the demands of the growing population.

The study suggests the best way to retain satisfaction, and subsequently increase home values, is to provide safe neighborhoods and quality schools. While those factors will most likely always remain priorities, the other attributes that did not rank as high shouldn't be discounted. All the attributes tested were fairly important to some portion of central Indiana residents. Further exploration of what is important to various audiences and building upon those community assets can be the key to maintaining the high level of resident satisfaction central Indiana currently enjoys.



ABOUT THE ORGANIZATIONS

Metropolitan Indianapolis Board of REALTORS®

The Metropolitan Indianapolis Board of REALTORS® is the professional association representing central Indiana's REALTORS®. MIBOR serves the needs of more than 6,300 members and affiliate members in Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan and Shelby counties. MIBOR also supplies the Broker Listing Cooperative® service to REALTORS® in Decatur, Madison and Putnam counties. To learn more about MIBOR, visit www.mibor.com.

Indianapolis Metropolitan Planning Organization

Each Urbanized Area with a population of 50,000 or more is required by Federal Regulations to have a designated Metropolitan Planning Organization (MPO) with the responsibility of conducting a continuing, cooperative and comprehensive transportation planning process. In the Indianapolis region, the City of Indianapolis, Department of Metropolitan Development (DMD) is the designated MPO. The MPO is responsible for planning in the area defined by the most current Census as being urbanized, plus the area anticipated to be urbanized in the next 20 years. This area is known as the Metropolitan Planning Area (MPA). The present MPA includes all of Marion County and portions of the surrounding counties of Boone, Hamilton, Hancock, Hendricks, Shelby, Morgan and Johnson.

Survey Methodology

The following observations are based on a telephone survey among 1,502 Central Indiana residents. Respondents were selected based on Random Digit Dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan, and Shelby. Interviews were conducted by professionally trained callers during the evenings of December 12 through December 19. Counties were sampled to be proportionally representative of the region as whole, with an oversampling in smaller counties to ensure sufficient representation (see table on right).

County	Interviews
Boone	102
Brown	107
Hamilton	211
Hancock	104
Hendricks	163
Johnson	143
Marion	376
Montgomery	97
Morgan	97
Shelby	102
Total	1,502

Results were weighted against figures from the 2010 Decennial Census to ensure proportional representation with respect to county, age, income, and gender. Based on this sample size and weighting, one can say with 95% confidence that the maximum error attributable to sampling is +/- 3.7%. The margin of error is larger for results based on subsets of respondents, such as those living within a particular county.

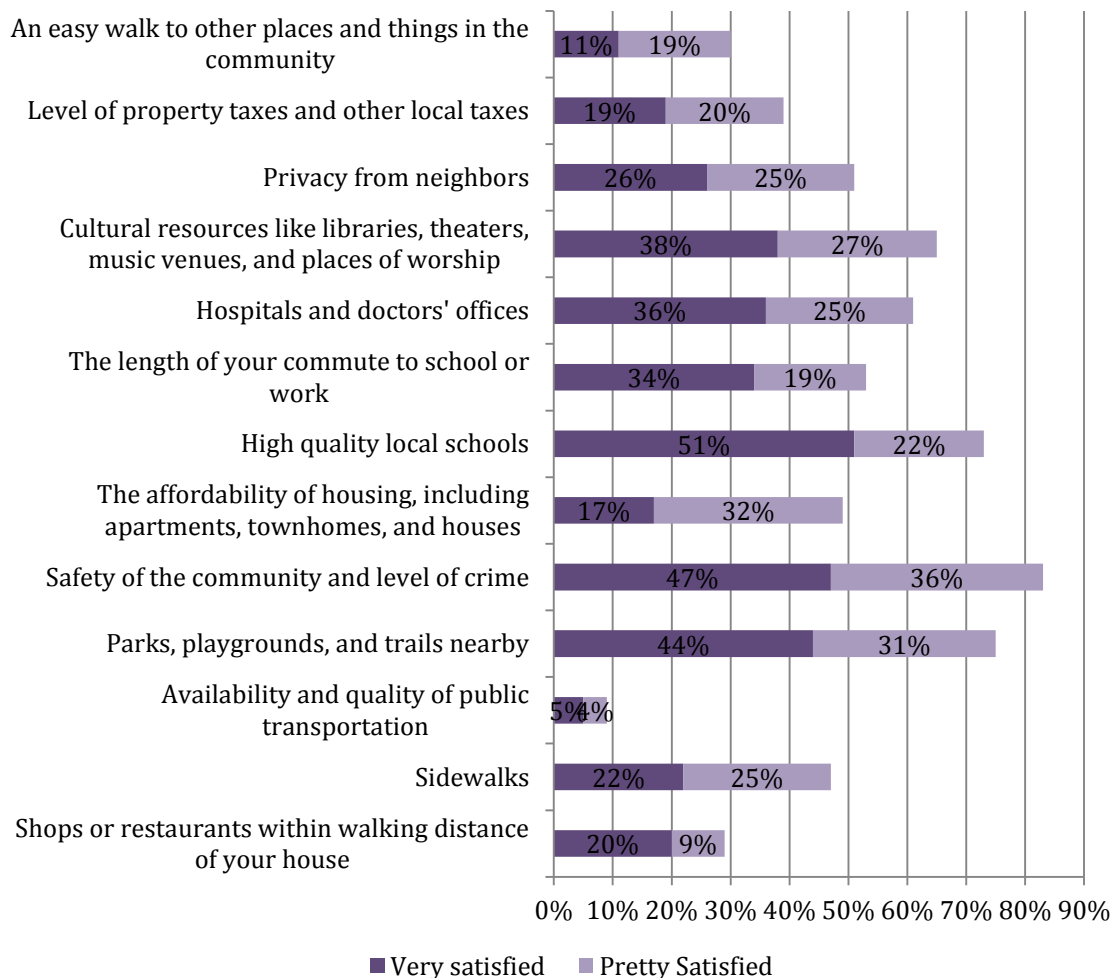
In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

Summary of Key Findings for Boone County

- **Most Boone County residents report little change in their quality of life over the past three years.** A total of 45% of respondents said their quality of life has stayed pretty much the same, while 34% say it has improved in the past three years and 19% said it has gotten worse.
- **Boone County residents are somewhat split on which qualities are most important when deciding where to live.** 51% of respondents gave preference to neighborhood qualities while 43% said housing qualities were most important. Comparatively, 57% of adults in Central Indiana indicated that neighborhood qualities are more important when deciding where to live, while 38% said housing qualities such as size were more important.
- **With the exception of the level of taxes, Boone County residents are most satisfied with the neighborhood features they consider most important.** That is, the higher residents rated an amenity or feature in terms of *importance*, the higher they tended to rate that amenity or feature in terms of *satisfaction*. However, only 39% of respondents reported being either "very" or "somewhat" satisfied with the level of local taxes, while 63% said that it was either "very" or "somewhat" important to them.

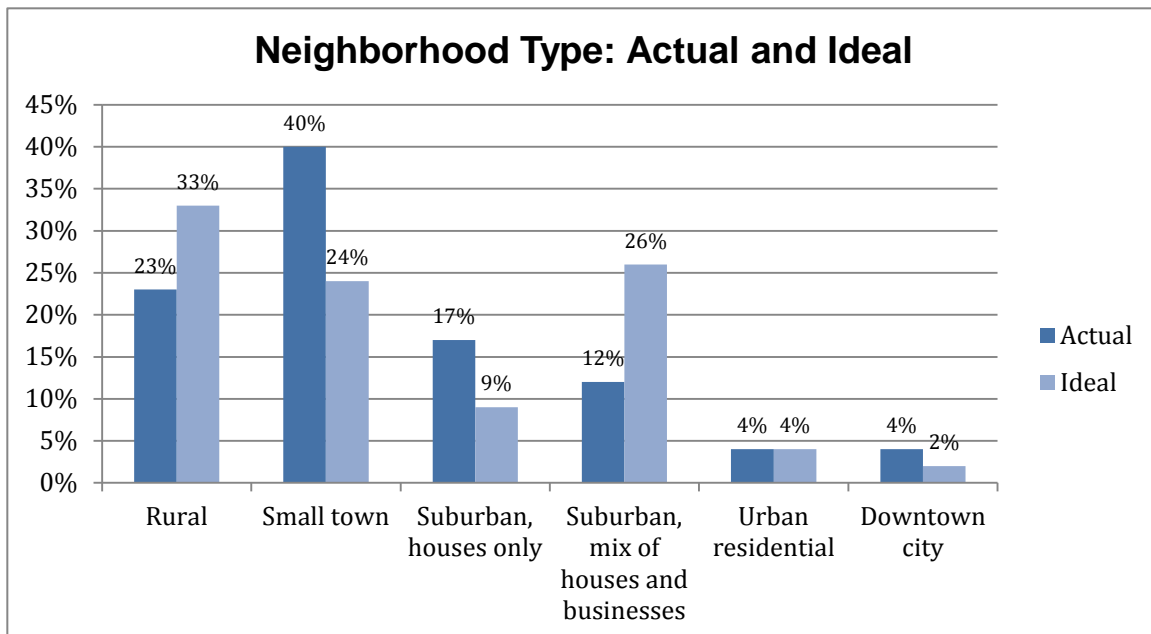
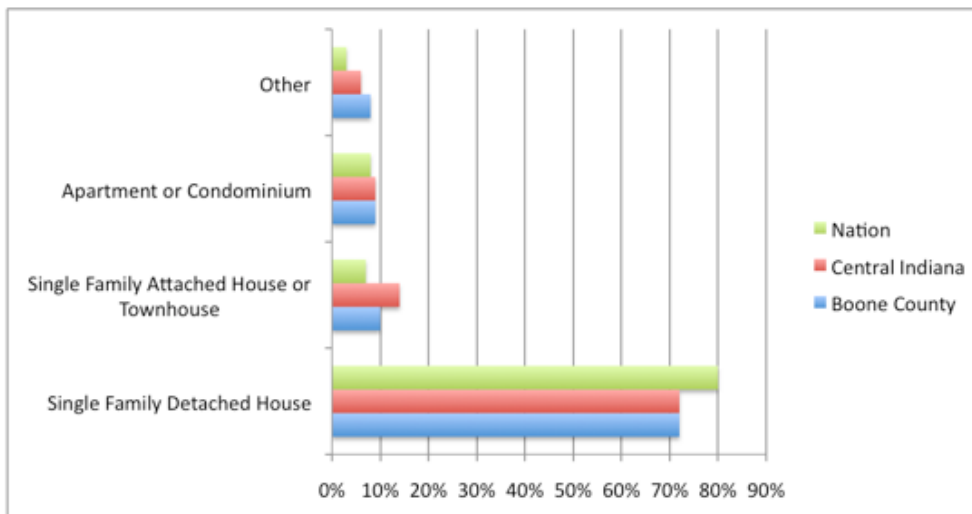
- **Far and away, the safety of the community and level of crime were the most important considerations for Boone County residents when deciding where to live.** 72% of respondents rated public safety as a “5” on a 5-point scale (i.e. “very important”), with an additional 18% rating it a “4” out of 5.
- **Given the choice, most residents are pretty split on their ideal neighborhood type.** 33% of respondents in Boone County said they would prefer to live in a rural area. Additionally, 26% said they would like to live in a suburban neighborhood with a mix of houses, shops and businesses, and 24% said they would like to live in a small town.

Satisfaction with Amenities and Features



Housing Type Preferences: Boone County, Central Indiana, and the Nation

Area	Single Family Detached House	Single Family Attached House or Townhouse	Apartment or Condominium	Other
Boone County	72%	10%	9%	8%
Central Indiana	72%	14%	9%	6%
Nation	80%	7%	8%	3%





MIBOR Community Preference Survey
Brown County Summary
Conducted December 12-19, 2012

Survey Methodology

The following observations are based on a telephone survey among 1,502 Central Indiana residents. Respondents were selected based on Random Digit Dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan, and Shelby. Interviews were conducted by professionally trained callers during the evenings of December 12 through December 19. Counties were sampled to be proportionally representative of the region as whole, with an oversampling in smaller counties to ensure sufficient representation (see table on right).

County	Interviews
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Johnson	143
Marion	376
Montgomery	97
Morgan	97
Shelby	102
Total	1,502

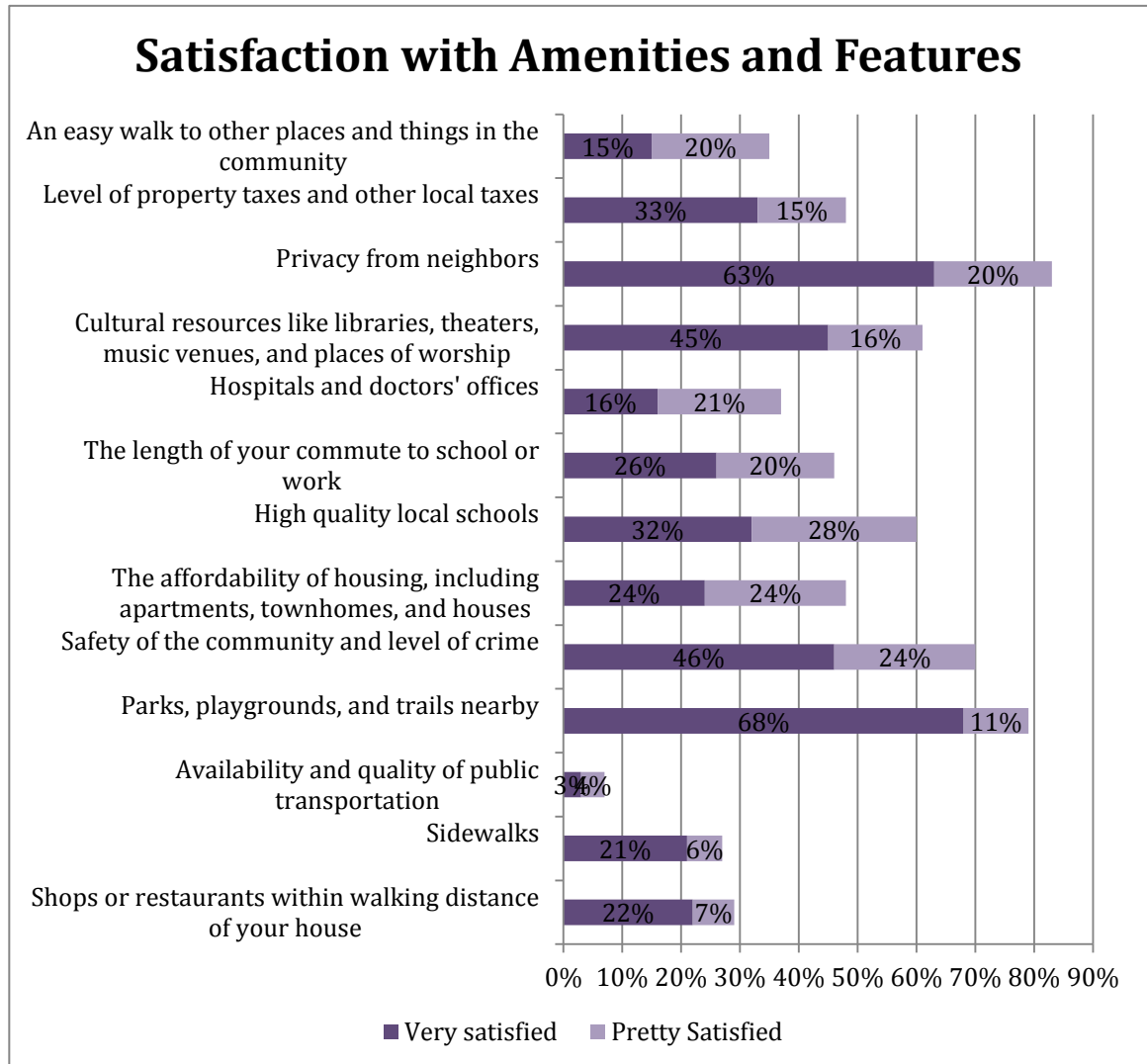
Results were weighted against figures from the 2010 Decennial Census to ensure proportional representation with respect to county, age, income, and gender. Based on this sample size and weighting, one can say with 95% confidence that the maximum error attributable to sampling is +/- 3.7%. The margin of error is larger for results based on subsets of respondents, such as those living within a particular county.

In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

Summary of Key Findings for Brown County

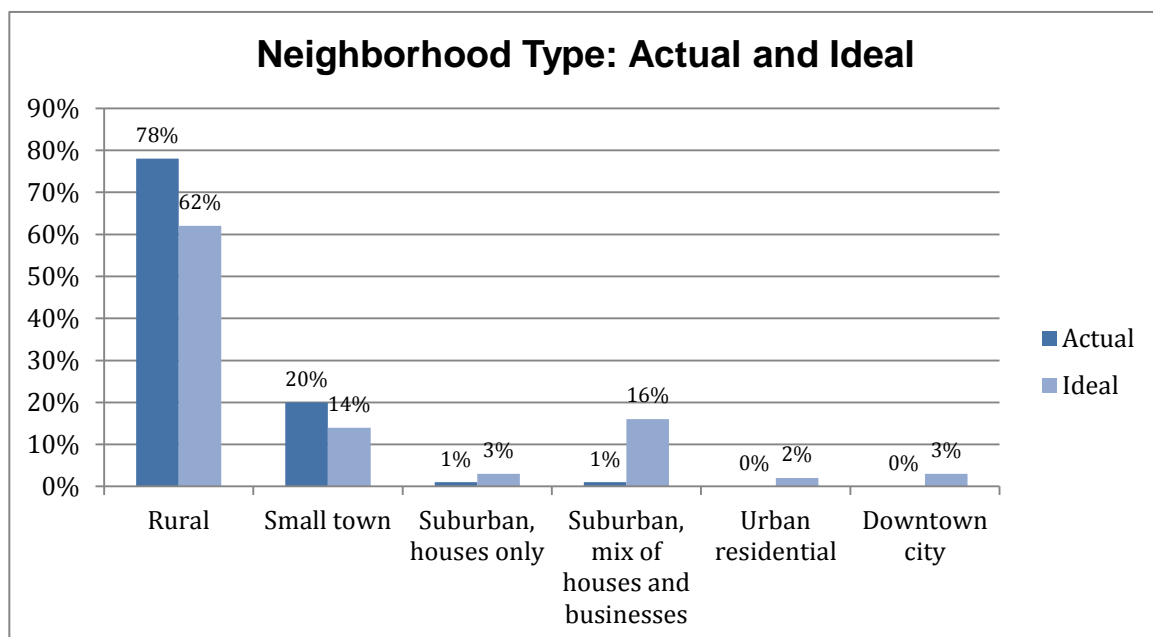
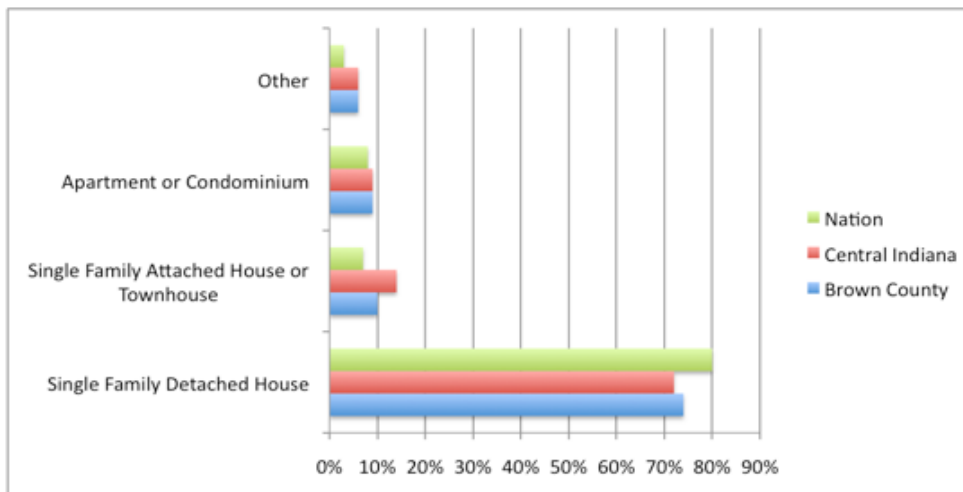
- **Most Brown County residents report little change in their quality of life over the past three years.** A total of 50% of respondents said their quality of life has stayed pretty much the same, while 23% say it has improved in the past three years and 21% said it has gotten worse.
- **Brown County residents are somewhat split on which qualities are most important when deciding where to live.** 51% of respondents gave preference to neighborhood qualities while 45% said housing qualities were most important. Comparatively, 57% of adults in Central Indiana indicated that neighborhood qualities are more important when deciding where to live, while 38% said housing qualities such as size were more important.
- **With a few exceptions, Brown County residents are most satisfied with the neighborhood features they consider most important.** That is, the higher residents rated an amenity or feature in terms of *importance*, the higher they tended to rate that amenity or feature in terms of *satisfaction*. However, only 48% of respondents reported being either "very" or "somewhat" satisfied with the level of local taxes, while 74% said that it was either "very" or "somewhat" important to them. The affordability of housing was another exception to this, as 69% said it was either "very" or "somewhat" important while just 48% said they were "very" or somewhat satisfied. The final exception was hospitals and doctors offices, where just 37% said they were "very" or somewhat satisfied, and 70% said it was "very" or somewhat important.

- **Far and away, the safety of the community and level of crime were the most important considerations for Brown County residents when deciding where to live.** 74% of respondents rated public safety as a “5” on a 5-point scale (i.e. “very important”), with an additional 18% rating it a “4” out of 5.
- **Given the choice, most residents would prefer to live in a rural area** 62% of respondents in Brown County said they would prefer to live in a rural area. The next most popular choice was a suburban neighborhood with a mix of houses, restaurants, and businesses at 16%.



Housing Type Preferences: Brown County, Central Indiana, and the Nation

Area	Single Family Detached House	Single Family Attached House or Townhouse	Apartment or Condominium	Other
Brown County	74%	10%	9%	6%
Central Indiana	72%	14%	9%	6%
Nation	80%	7%	8%	3%



Survey Methodology

The following observations are based on a telephone survey among 1,502 Central Indiana residents. Respondents were selected based on Random Digit Dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan, and Shelby. Interviews were conducted by professionally trained callers during the evenings of December 12 through December 19. Counties were sampled to be proportionally representative of the region as whole, with an oversampling in smaller counties to ensure sufficient representation (see table on right).

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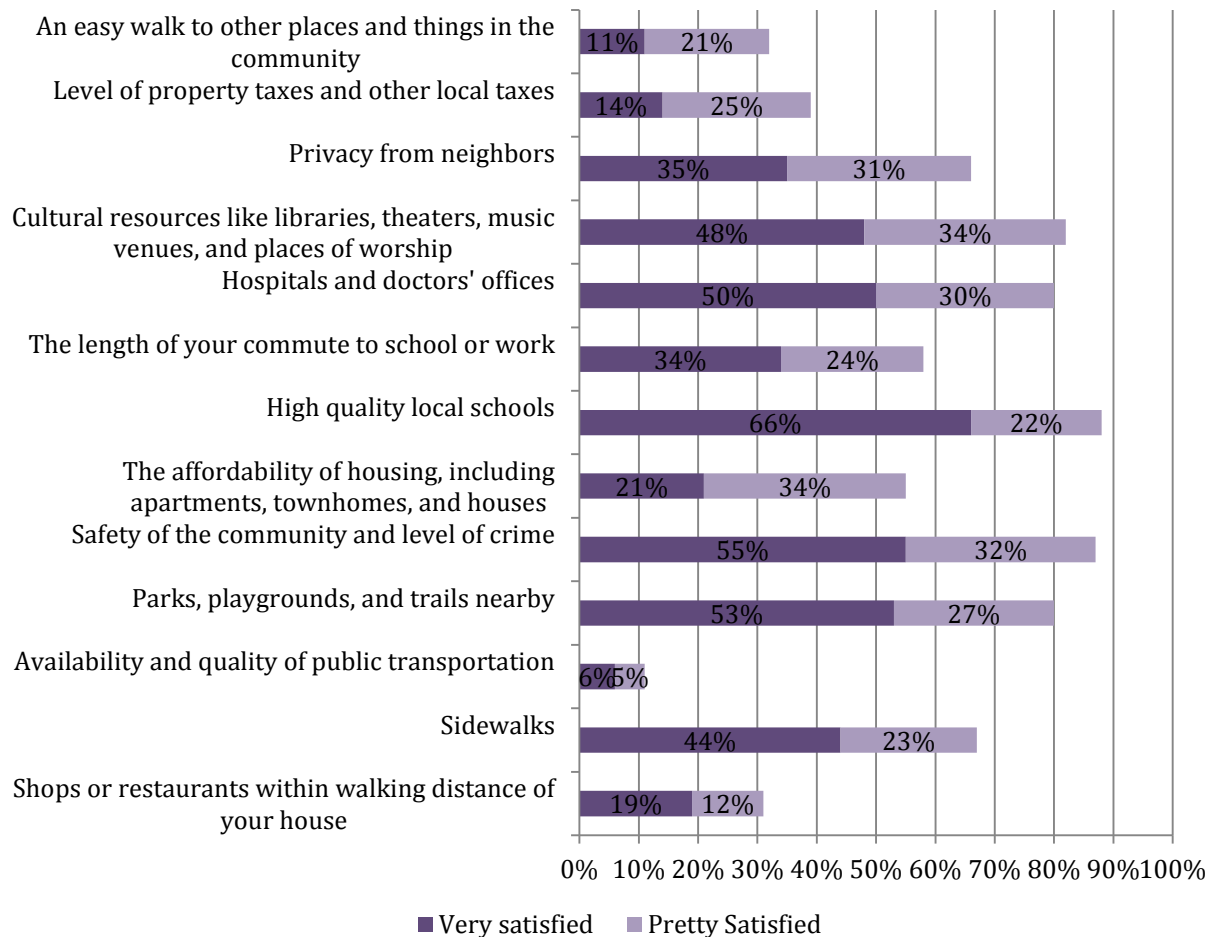
In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

Summary of Key Findings for Hamilton County

- **Most Hamilton County residents report either positive improvement or little change in their quality of life over the past three years.** A total of 48% of respondents said their quality of life has stayed pretty much the same, while 43% say it has improved in the past three years. By contrast, only 6% said it has gotten worse.
- **Following regional trends, Hamilton County residents consider neighborhood qualities to be more important than housing qualities when deciding where to live.** 55% of respondents gave preference to neighborhood qualities while 38% said housing qualities were most important. Comparatively, 57% of adults in Central Indiana indicated that neighborhood qualities are more important when deciding where to live, while 38% said housing qualities such as size were more important.
- **Hamilton County residents are most satisfied with the neighborhood features they consider most important.** That is, the higher residents rated an amenity or feature in terms of *importance*, the higher they tended to rate that amenity or feature in terms of *satisfaction*.

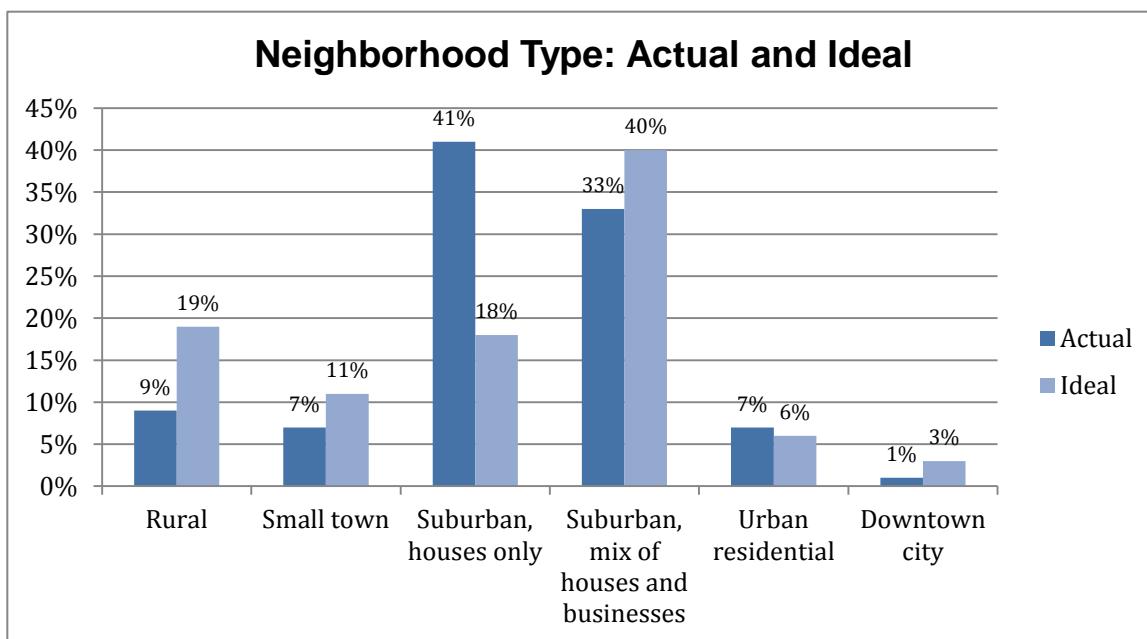
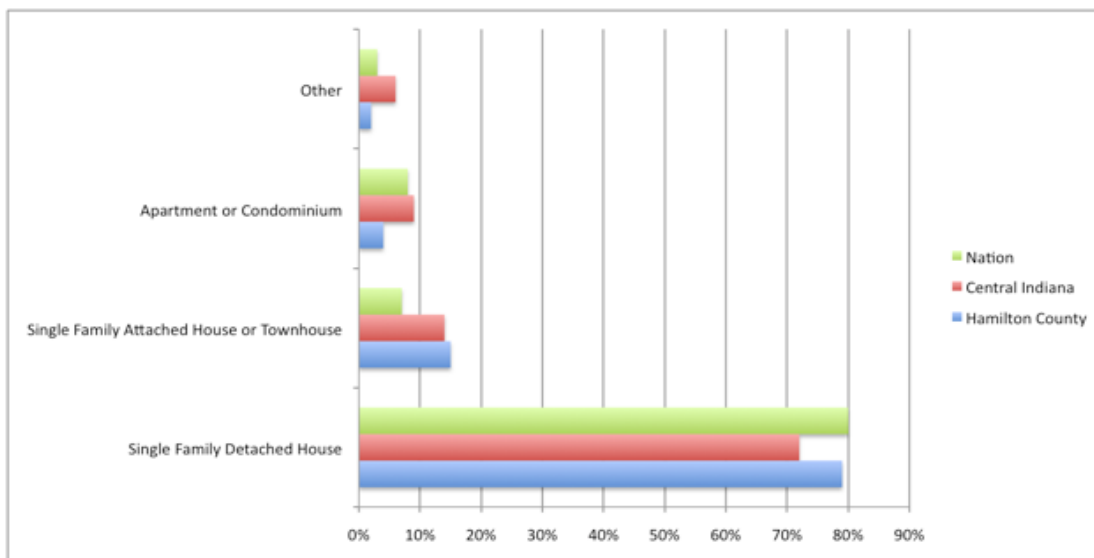
- **Far and away, the safety of the community and level of crime were the most important considerations for Hamilton County residents when deciding where to live.** 80% of respondents rated public safety as a “5” on a 5-point scale (i.e. “very important”), with an additional 15% rating it a “4” out of 5.
- **Given the choice, most residents would prefer to live in a suburban neighborhood with a mix of houses, shops, and businesses.** 40% of respondents in Hamilton County said they would prefer to live in a suburban neighborhood that had a combination of houses, shops and business. Additionally, 33% of respondents reported currently living in such a neighborhood.

Satisfaction with Amenities and Features



Housing Type Preferences: Hamilton County, Central Indiana, and the Nation

Area	Single Family Detached House	Single Family Attached House or Townhouse	Apartment or Condominium	Other
Hamilton County	79%	15%	4%	2%
Central Indiana	72%	14%	9%	6%
Nation	80%	7%	8%	3%



Survey Methodology

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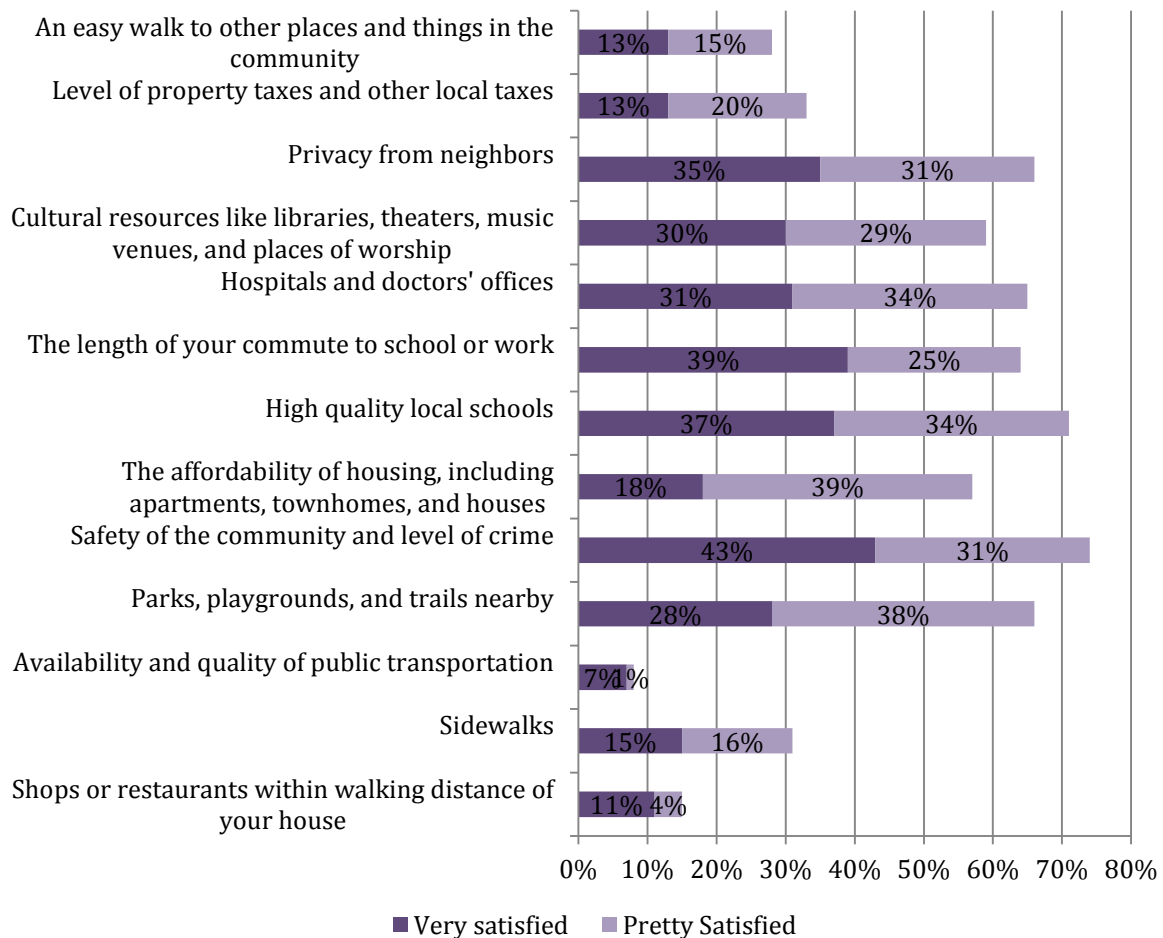
In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

Summary of Key Findings for Hancock County

- **Most Hancock County residents report little change in their quality of life over the past three years.** A total of 58% of respondents said their quality of life has stayed pretty much the same, while 20% say it has improved in the past three years and 21% said it has gotten worse.
- **Following regional trends, Hancock County residents consider neighborhood qualities to be more important than housing qualities when deciding where to live.** 60% of respondents gave preference to neighborhood qualities while 36% said housing qualities were most important. Comparatively, 57% of adults in Central Indiana indicated that neighborhood qualities are more important when deciding where to live, while 38% said housing qualities such as size were more important.
- **Hancock County residents are most satisfied with the neighborhood features they consider most important.** That is, the higher residents rated an amenity or feature in terms of *importance*, the higher they tended to rate that amenity or feature in terms of *satisfaction*.

- **Far and away, the safety of the community and level of crime were the most important considerations for Hancock County residents when deciding where to live.** 74% of respondents rated public safety as a “5” on a 5-point scale (i.e. “very important”), with an additional 20% rating it a “4” out of 5.
- **Given the choice, most residents would prefer to live in a small town or rural setting.** 30% of respondents in Hancock County said they would prefer to live in a rural area, with an additional 29% saying they would prefer to live in a small town.

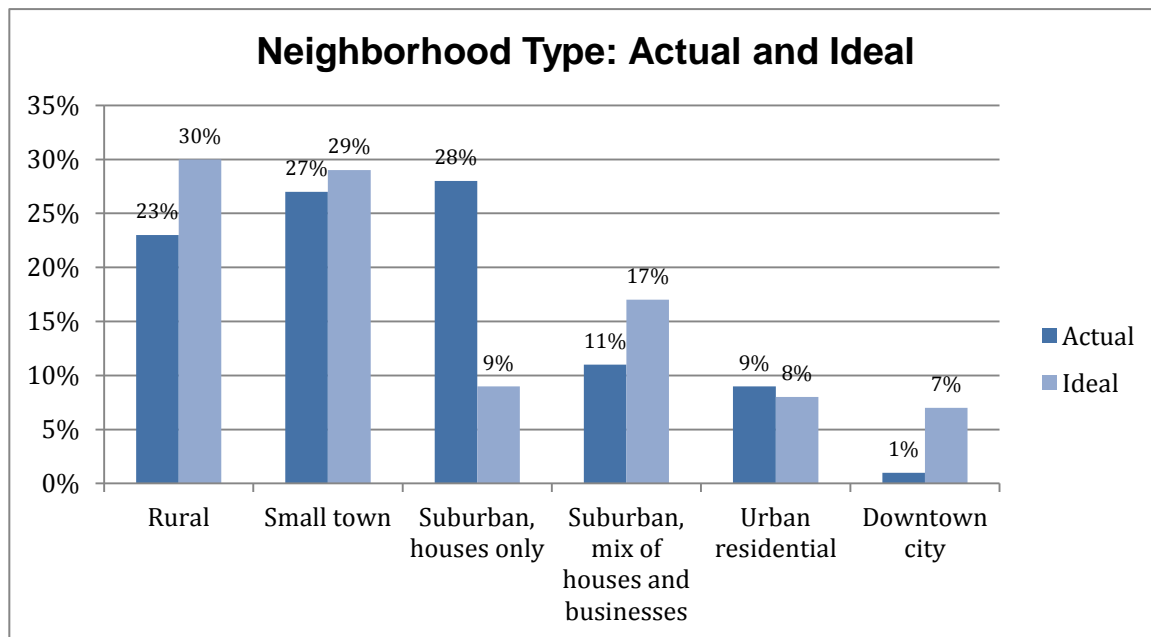
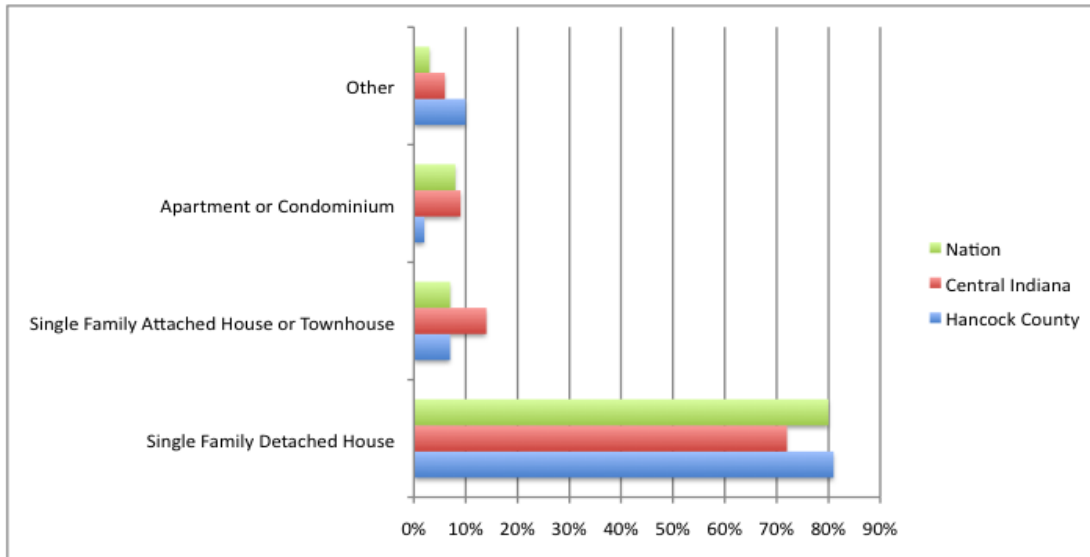
Satisfaction with Amenities and Features



MIBOR Community Preference Survey Hancock County Summary Conducted December 12-19, 2012

Housing Type Preferences: Hancock County, Central Indiana, and the Nation

Area	Single Family Detached House	Single Family Attached House or Townhouse	Apartment or Condominium	Other
Hancock County	81%	7%	2%	10%
Central Indiana	72%	14%	9%	6%
Nation	80%	7%	8%	3%





MIBOR Community Preference Survey
Hendricks County Summary
Conducted December 12–19, 2012

Survey Methodology

The following observations are based on a telephone survey among 1,502 Central Indiana residents. Respondents were selected based on Random Digit Dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan, and Shelby. Interviews were conducted by professionally trained callers during the evenings of December 12 through December 19. Counties were sampled to be proportionally representative of the region as a whole, with an oversampling in smaller counties to ensure sufficient representation (see table on right).

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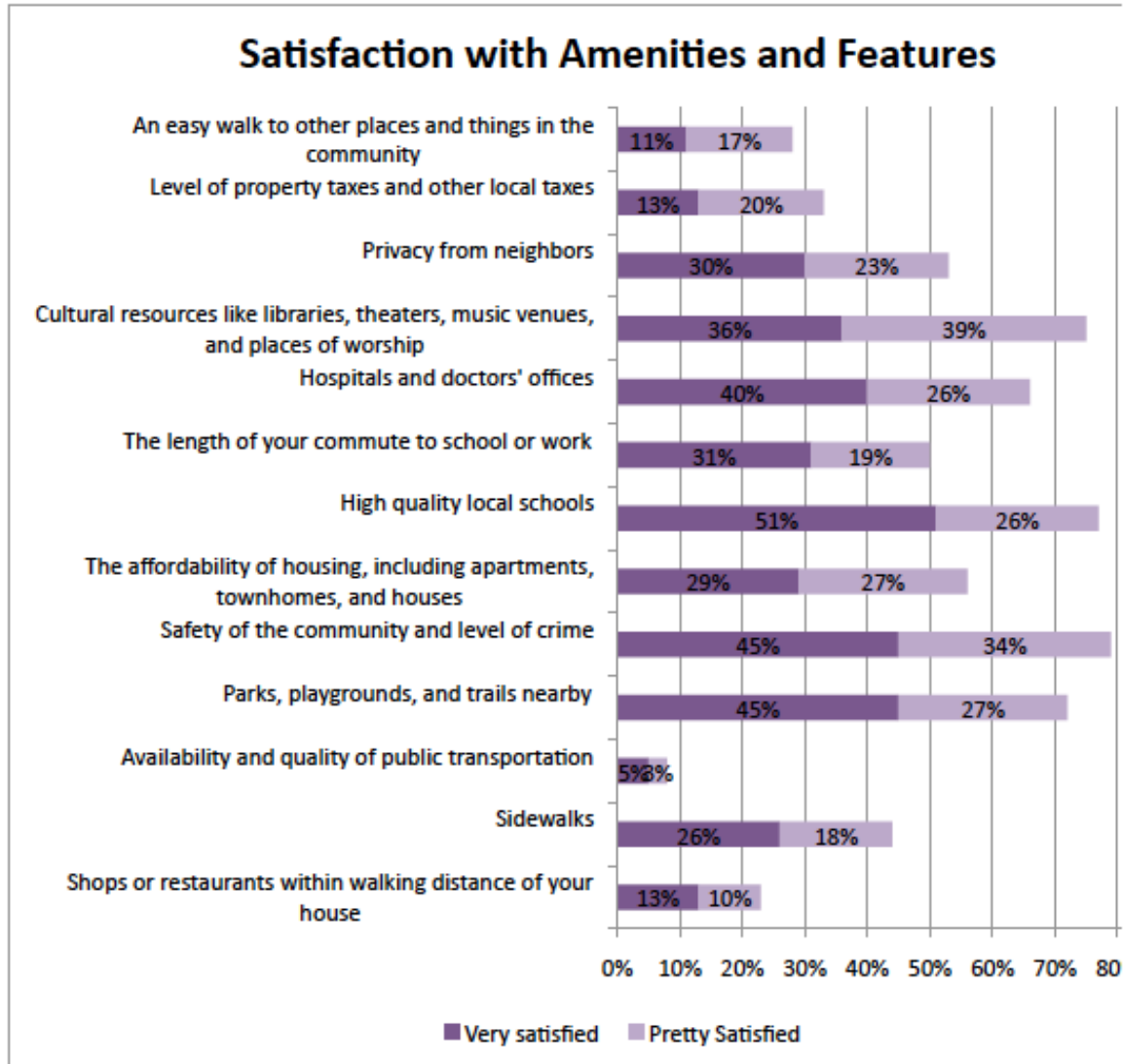
In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

Summary of Key Findings for Hendricks County

- **Most Hendricks County residents report little change in their quality of life over the past three years.** A total of 51% of respondents said their quality of life has stayed pretty much the same while 26% say it has improved in the past three years and 22% said it has gotten worse.
- **Breaking from national and regional trends, Hendricks County residents consider neighborhood qualities to be equally as important as housing qualities when deciding where to live.** 48% of respondents gave preference to neighborhood qualities while 46% said housing qualities were most important. Comparatively, 88% of adults nationwide indicated that neighborhood qualities are more important when deciding where to live than the size of the house. And in Central Indiana the numbers were 57% for neighborhood qualities and 38% for housing types.
- **Hendricks County residents are most satisfied with the neighborhood features they consider most important.** That is, the higher residents rated an amenity or feature in terms of *importance*, the higher they tended to rate that amenity or feature in terms of *satisfaction*.
- **Far and away, the safety of the community and level of crime were the most important considerations for Hendricks County residents when deciding where**

to live. 74% of respondents rated public safety as a “5” on a 5-point scale (i.e. “very important”), with an additional 20% rating it a “4” out of 5.

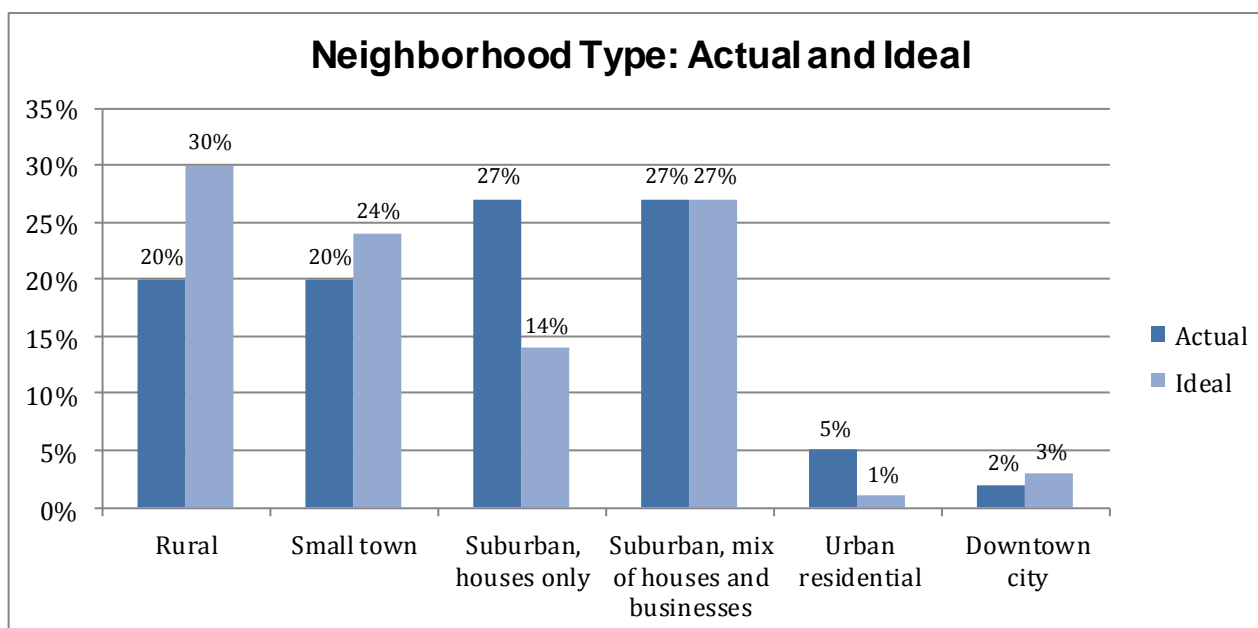
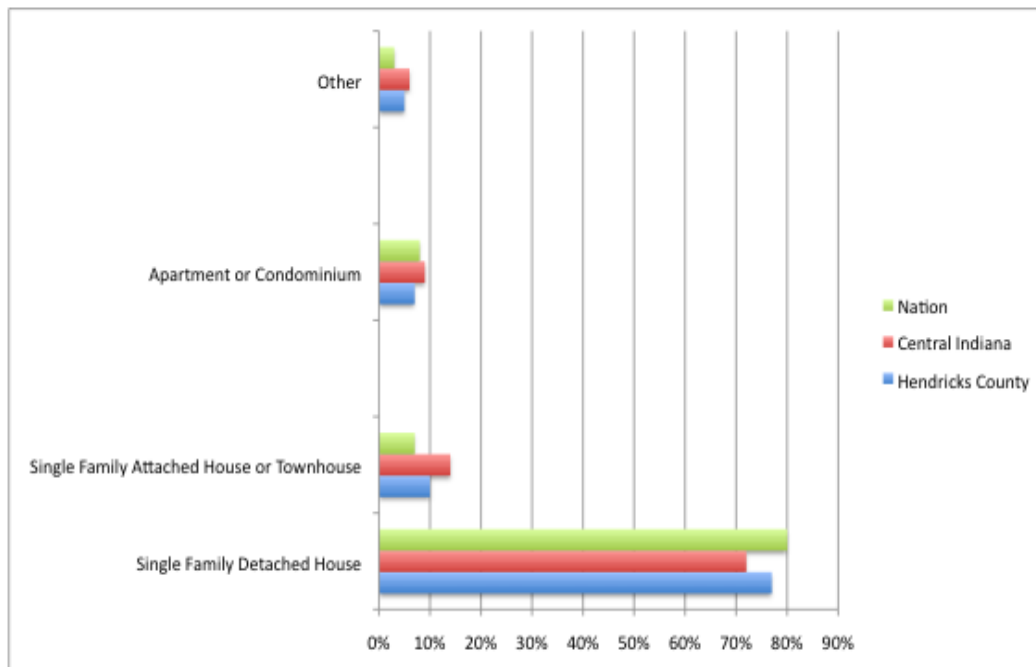
- **Given the choice, most residents would prefer to live in a suburban neighborhood or rural setting.** 41% of respondents said they would prefer to live in a suburban neighborhood (14% with houses only and 27% with a mixture of houses and business), with an additional 30% saying they'd prefer to live in a rural area.



MIBOR Community Preference Survey Hendricks County Summary Conducted December 12-19, 2012

Housing Type Preferences: Hendricks County, Central Indiana, and the Nation

Area	Single Family Detached House	Single Family Attached House or Townhouse	Apartment or Condominium	Other
Hendricks County	77%	10%	7%	5%
Central Indiana	72%	14%	9%	6%
Nation	80%	7%	8%	3%



Survey Methodology

The following observations are based on a telephone survey among 1,502 Central Indiana residents. Respondents were selected based on Random Digit Dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan, and Shelby. Interviews were conducted by professionally trained callers during the evenings of December 12 through December 19. Counties were sampled to be proportionally representative of the region as whole, with an oversampling in smaller counties to ensure sufficient representation (see table on right).

County	Interviews
Boone	102
Brown	107
Hamilton	211
Hancock	104
Hendricks	163
Johnson	143
Marion	376
Montgomery	97
Morgan	97
Shelby	102
Total	1,502

Results were weighted against figures from the 2010 Decennial Census to ensure proportional representation with respect to county, age, income, and gender. Based on this sample size and weighting, one can say with 95% confidence that the maximum error attributable to sampling is +/- 3.7%. The margin of error is larger for results based on subsets of respondents, such as those living within a particular county.

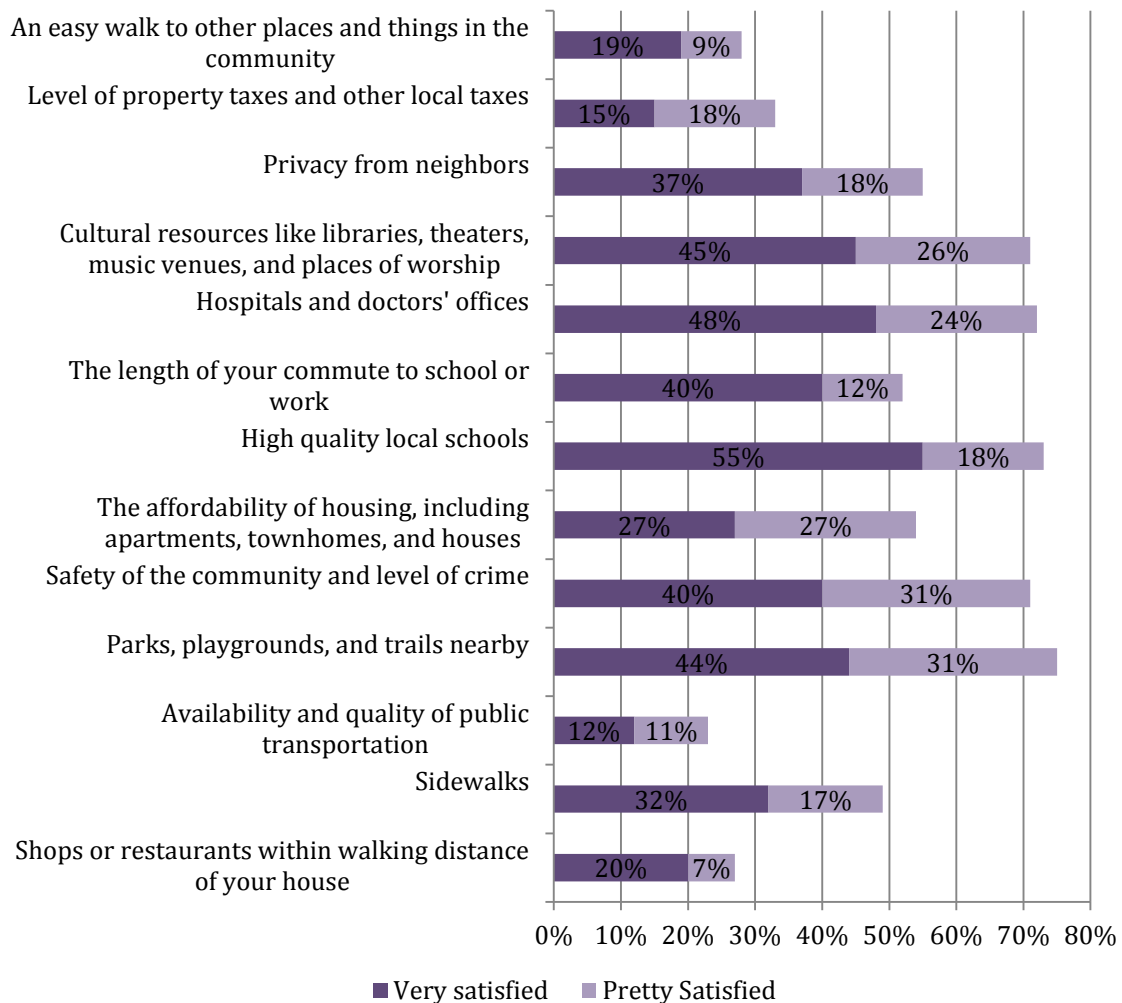
In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

Summary of Key Findings for Johnson County

- Most Johnson County residents report little change in their quality of life over the past three years.** A total of 59% of respondents said their quality of life has stayed pretty much the same, while 20% say it has improved in the past three years and 21% said it has gotten worse.
- Johnson County residents view neighborhood qualities as most important when deciding where to live.** 54% of respondents gave preference to neighborhood qualities while 38% said housing qualities were most important. Comparatively, 57% of adults in Central Indiana indicated that neighborhood qualities are more important when deciding where to live, while 38% said housing qualities such as size were more important.
- With the exception of local taxes and the affordability of housing, Brown County residents are most satisfied with the neighborhood features they consider most important.** That is, the higher residents rated an amenity or feature in terms of *importance*, the higher they tended to rate that amenity or feature in terms of *satisfaction*. However, only 33% of respondents reported being either "very" or "somewhat" satisfied with the level of local taxes, while 69% said that it was either "very" or "somewhat" important to them. The affordability of housing was another exception to this, as 73% said it was either "very" or "somewhat" important while just 54% said they were "very" or somewhat satisfied.

- **Far and away, the safety of the community and level of crime were the most important considerations for Brown County residents when deciding where to live.** 76% of respondents rated public safety as a "5" on a 5-point scale (i.e. "very important"), with an additional 17% rating it a "4" out of 5.
- **Given the choice, many residents would prefer to live in a rural area** 31% of respondents in Brown County said they would prefer to live in a rural area. The next most popular choice was a suburban neighborhood with a mix of houses, restaurants, and businesses at 23%.

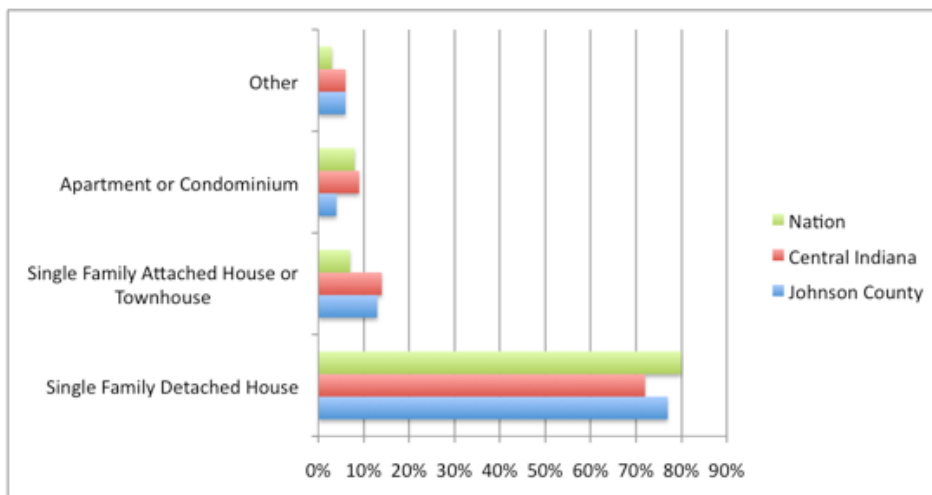
Satisfaction with Amenities and Features



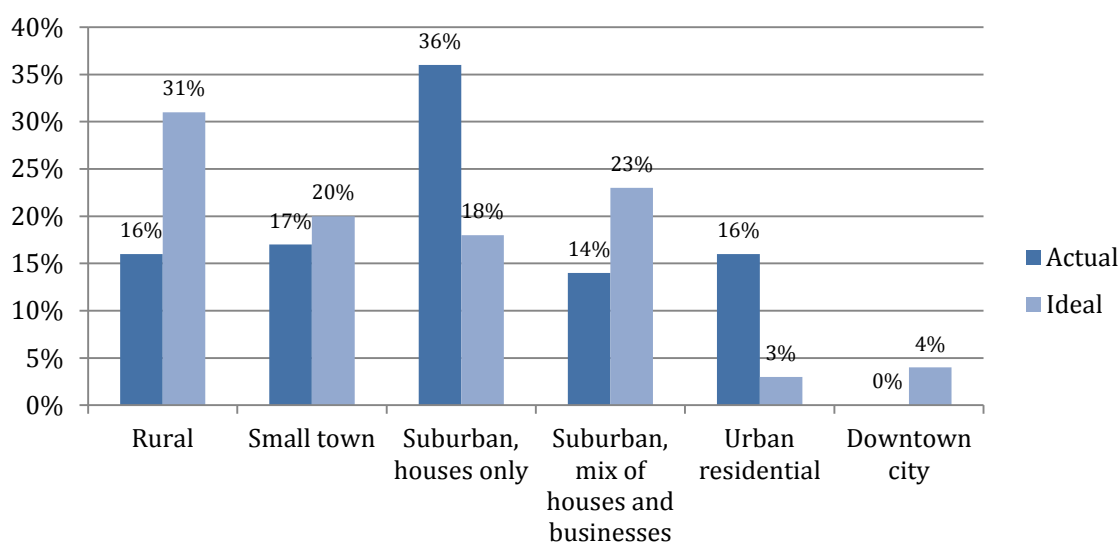
MIBOR Community Preference Survey
Johnson County Summary
Conducted December 12-19, 2012

Housing Type Preferences: Johnson County, Central Indiana, and the Nation

Area	Single Family Detached House	Single Family Attached House or Townhouse	Apartment or Condominium	Other
Johnson County	77%	13%	4%	6%
Central Indiana	72%	14%	9%	6%
Nation	80%	7%	8%	3%



Neighborhood Type: Actual and Ideal



Survey Methodology

The following observations are based on a telephone survey among 1,502 Central Indiana residents. Respondents were selected based on Random Digit Dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan, and Shelby. Interviews were conducted by professionally trained callers during the evenings of December 12 through December 19. Counties were sampled to be proportionally representative of the region as whole, with an oversampling in smaller counties to ensure sufficient representation (see table on right).

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Shelby	102
Total	1,502

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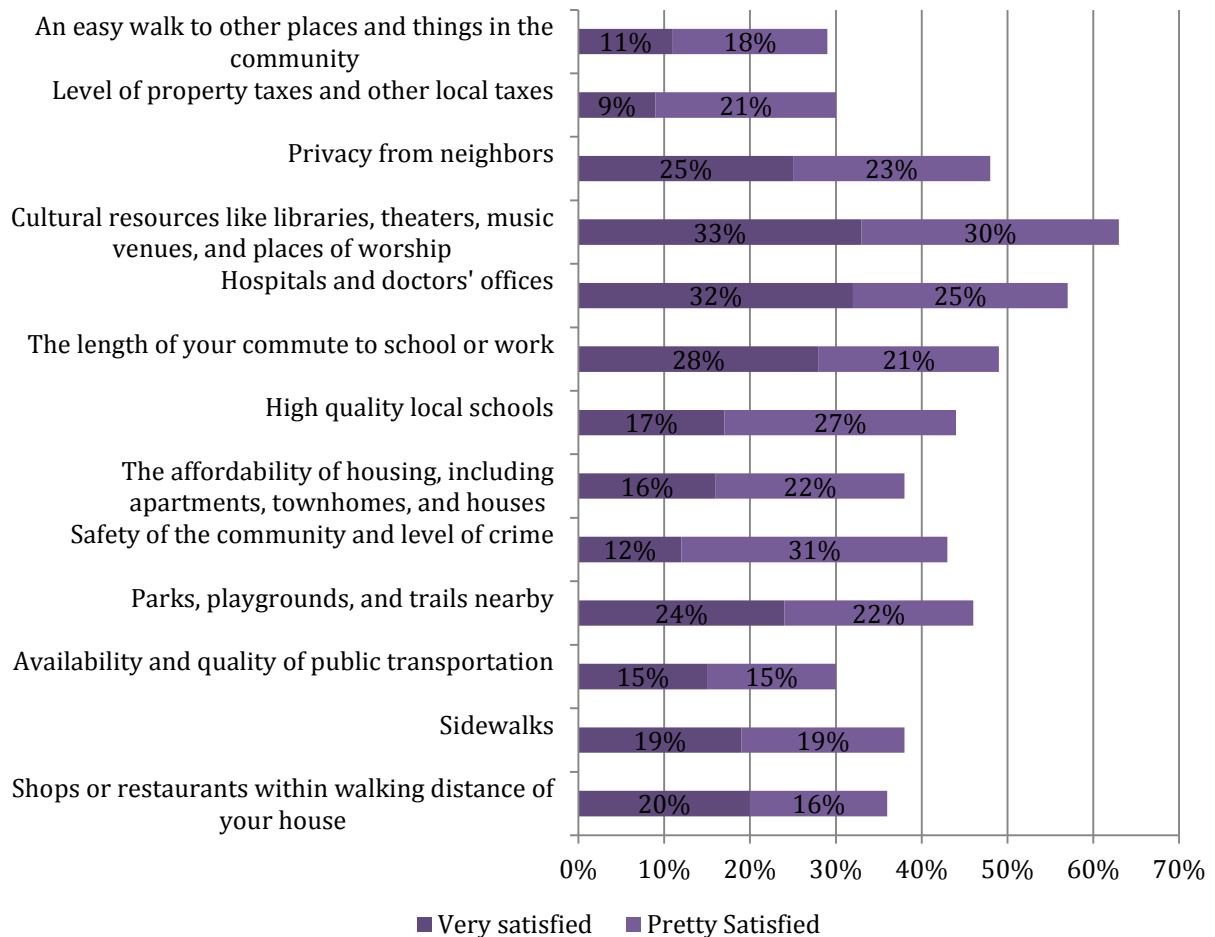
In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

Summary of Key Findings for Marion County

- Most Marion County residents report little change in their quality of life over the past three years.** A total of 49% of respondents said their quality of life has stayed pretty much the same, while 27% say it has gotten worse in the past three years. By contrast, only 17% said it has improved.
- Following regional trends, Marion County residents consider neighborhood qualities to be more important than housing qualities when deciding where to live.** 62% of respondents gave preference to neighborhood qualities while 36% said housing qualities were most important. Comparatively, 57% of adults in Central Indiana indicated that neighborhood qualities are more important when deciding where to live, while 38% said housing qualities such as size were more important.
- Marion County residents are generally dissatisfied with amenities and features in their neighborhoods, particularly those they view as most important.** Only three amenities and features had satisfaction rates above 50%. Additionally, 4 out of the 5 amenities and features respondents said were most important to them had satisfaction rates lower than 50%.

- **Far and away, the safety of the community and level of crime were the most important considerations for Marion County residents when deciding where to live.** 70% of respondents rated public safety as a “5” on a 5-point scale (i.e. “very important”), with an additional 16% rating it a “4” out of 5.
- **Given the choice, most residents would prefer to live in a suburban neighborhood with a mix of houses, shops, and businesses.** 31% of respondents in Marion County said they would prefer to live in a suburban neighborhood that had a combination of houses, shops and business. Additionally, 18% of respondents reported currently living in such a neighborhood.

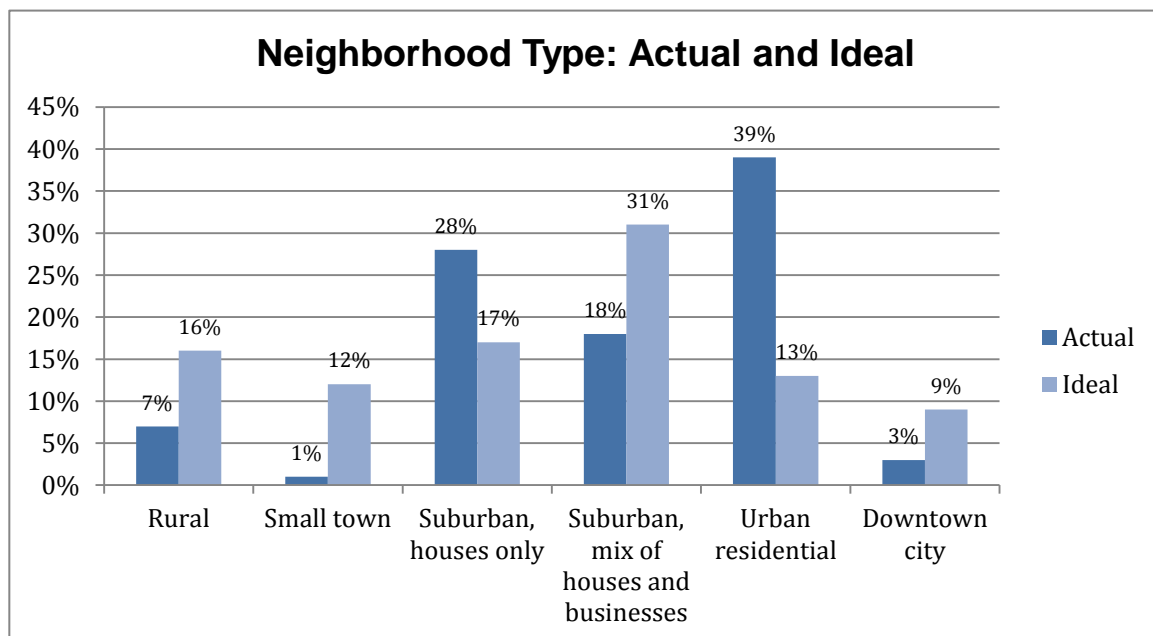
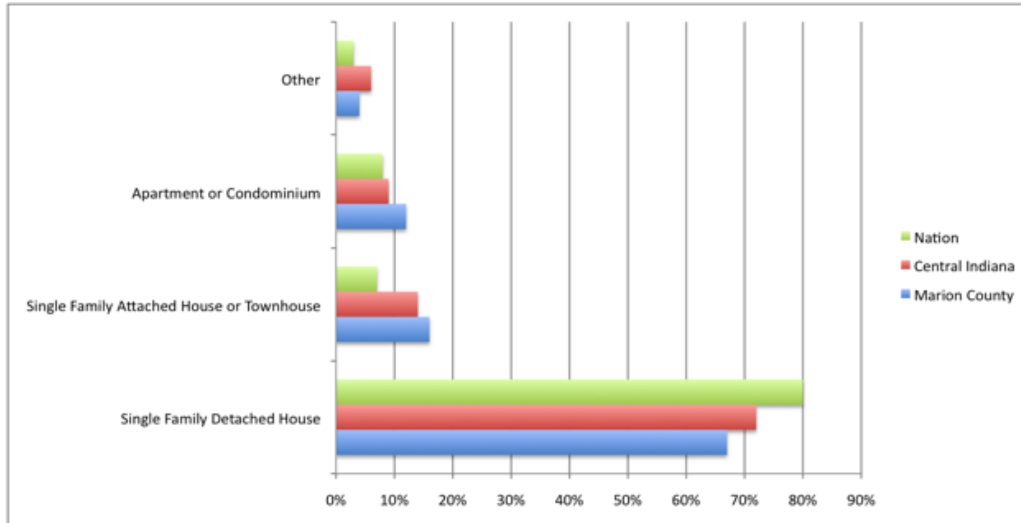
Satisfaction with Amenities and Features



MIBOR Community Preference Survey
Marion County Summary
Conducted December 12-19, 2012

Housing Type Preferences: Marion County, Central Indiana, and the Nation

Area	Single Family Detached House	Single Family Attached House or Townhouse	Apartment or Condominium	Other
Marion County	67%	16%	12%	4%
Central Indiana	72%	14%	9%	6%
Nation	80%	7%	8%	3%



Survey Methodology

The following observations are based on a telephone survey among 1,502 Central Indiana residents. Respondents were selected based on Random Digit Dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan, and Shelby. Interviews were conducted by professionally trained callers during the evenings of December 12 through December 19. Counties were sampled to be proportionally representative of the region as whole, with an oversampling in smaller counties to ensure sufficient representation (see table on right).

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Hendricks	163
Johnson	143
Marion	376
Montgomery	97
Morgan	97
Shelby	102
Total	1,502

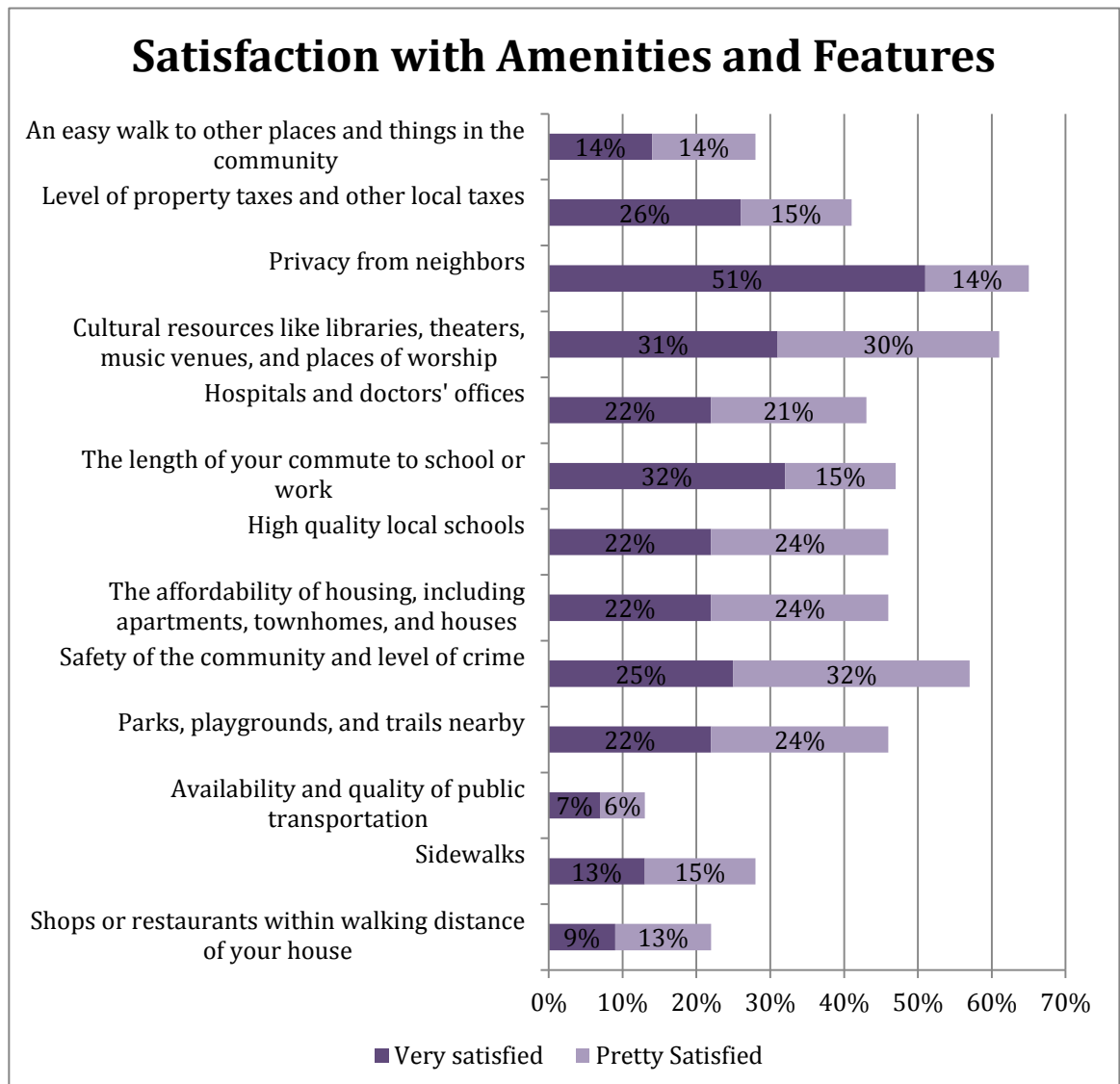
Results were weighted against figures from the 2010 Decennial Census to ensure proportional representation with respect to county, age, income, and gender. Based on this sample size and weighting, one can say with 95% confidence that the maximum error attributable to sampling is +/- 3.7%. The margin of error is larger for results based on subsets of respondents, such as those living within a particular county.

In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

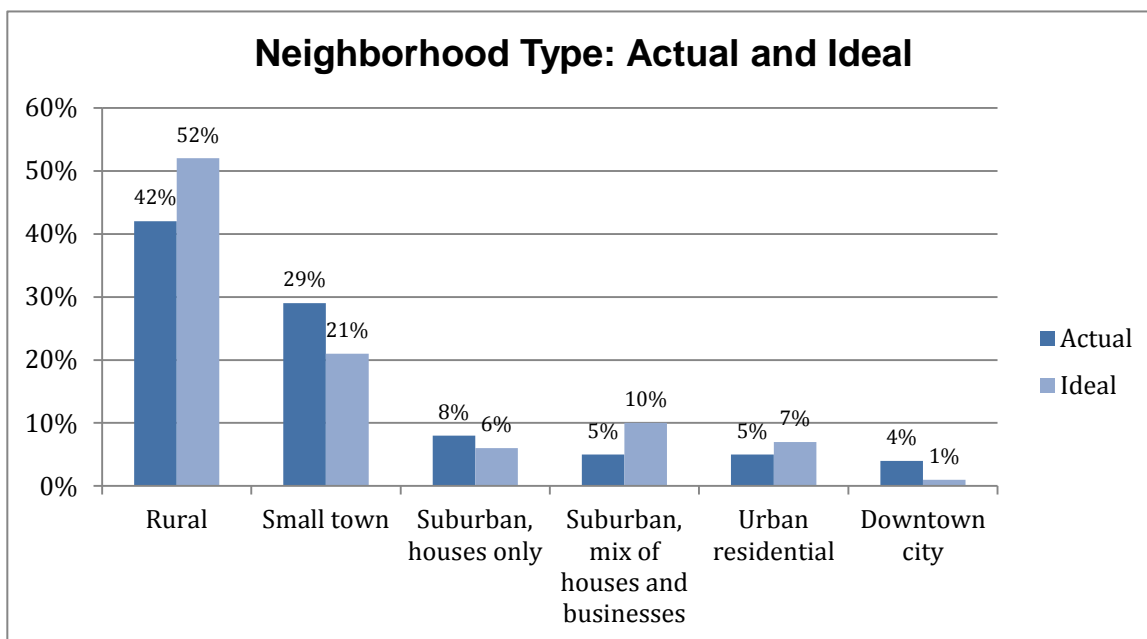
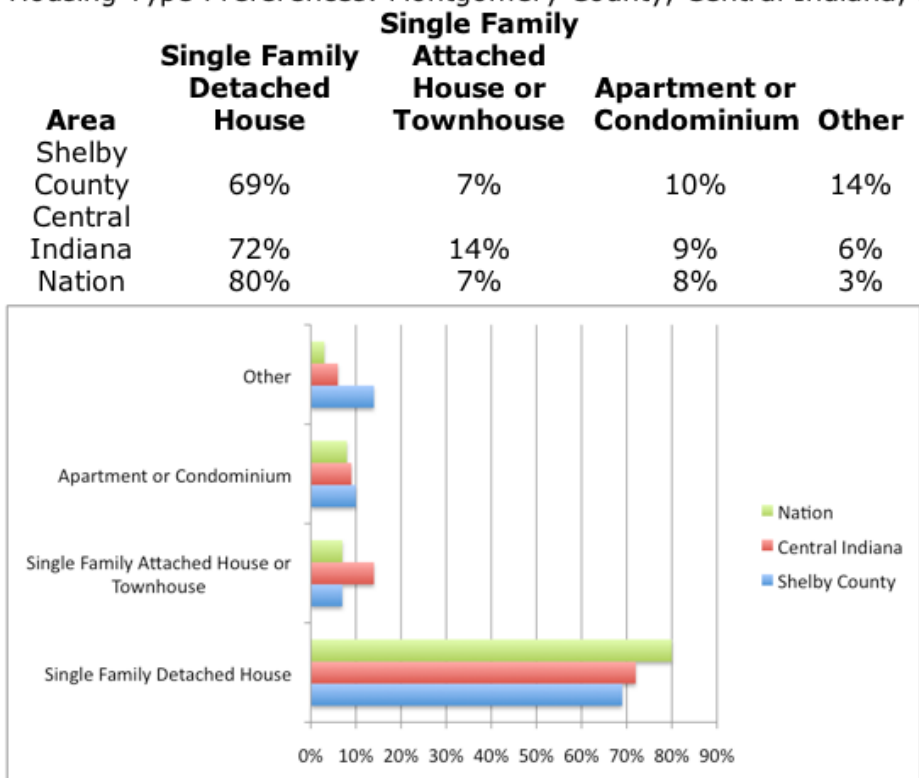
Summary of Key Findings for Montgomery County

- Most Montgomery County residents report little change in their quality of life over the past three years.** A total of 57% of respondents said their quality of life has stayed pretty much the same, while 25% say it has gotten worse in the past three years. Just 16% said it has improved.
- Following regional trends, neighborhood qualities are important than housing qualities for Montgomery County residents.** When deciding where to live, 57% of respondents said housing qualities were more important while 39% gave preference to neighborhood qualities. Comparatively, 57% of adults in Central Indiana indicated that neighborhood qualities are more important when deciding where to live, while 38% said housing qualities such as size were more important.
- Generally, Montgomery County residents are most satisfied with the neighborhood features they consider most important.** That is, the higher residents rated an amenity or feature in terms of *importance*, the higher they tended to rate that amenity or feature in terms of *satisfaction*. There are a few exceptions to this, however. Most notably, safety of the community and level of crime ranks as the most important amenity, but is towards the middle of the group in terms of satisfaction.

- **Far and away, the safety of the community and level of crime were the most important considerations for Montgomery County residents when deciding where to live.** 70% of respondents rated public safety as a "5" on a 5-point scale (i.e. "very important"), with an additional 14% rating it a "4" out of 5.
- **Given the choice, most residents would prefer to live in a rural neighborhood.** 52% of respondents in Montgomery County said they would prefer to live in a rural neighborhood. Additionally, 46% of respondents reported currently living in such a neighborhood.



Housing Type Preferences: Montgomery County, Central Indiana, and the Nation



Survey Methodology

The following observations are based on a telephone survey among 1,502 Central Indiana residents. Respondents were selected based on Random Digit Dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan, and Shelby. Interviews were conducted by professionally trained callers during the evenings of December 12 through December 19. Counties were sampled to be proportionally representative of the region as whole, with an oversampling in smaller counties to ensure sufficient representation (see table on right).

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Boone	102
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Hamilton	211
Hancock	104
Hendricks	163
Johnson	143
Marion	376
Montgomery	97
Morgan	97
Shelby	102
Total	1,502

Results were weighted against figures from the 2010 Decennial Census to ensure proportional representation with respect to county, age, income, and gender. Based on this sample size and weighting, one can say with 95% confidence that the maximum error attributable to sampling is +/- 3.7%. The margin of error is larger for results based on subsets of respondents, such as those living within a particular county.

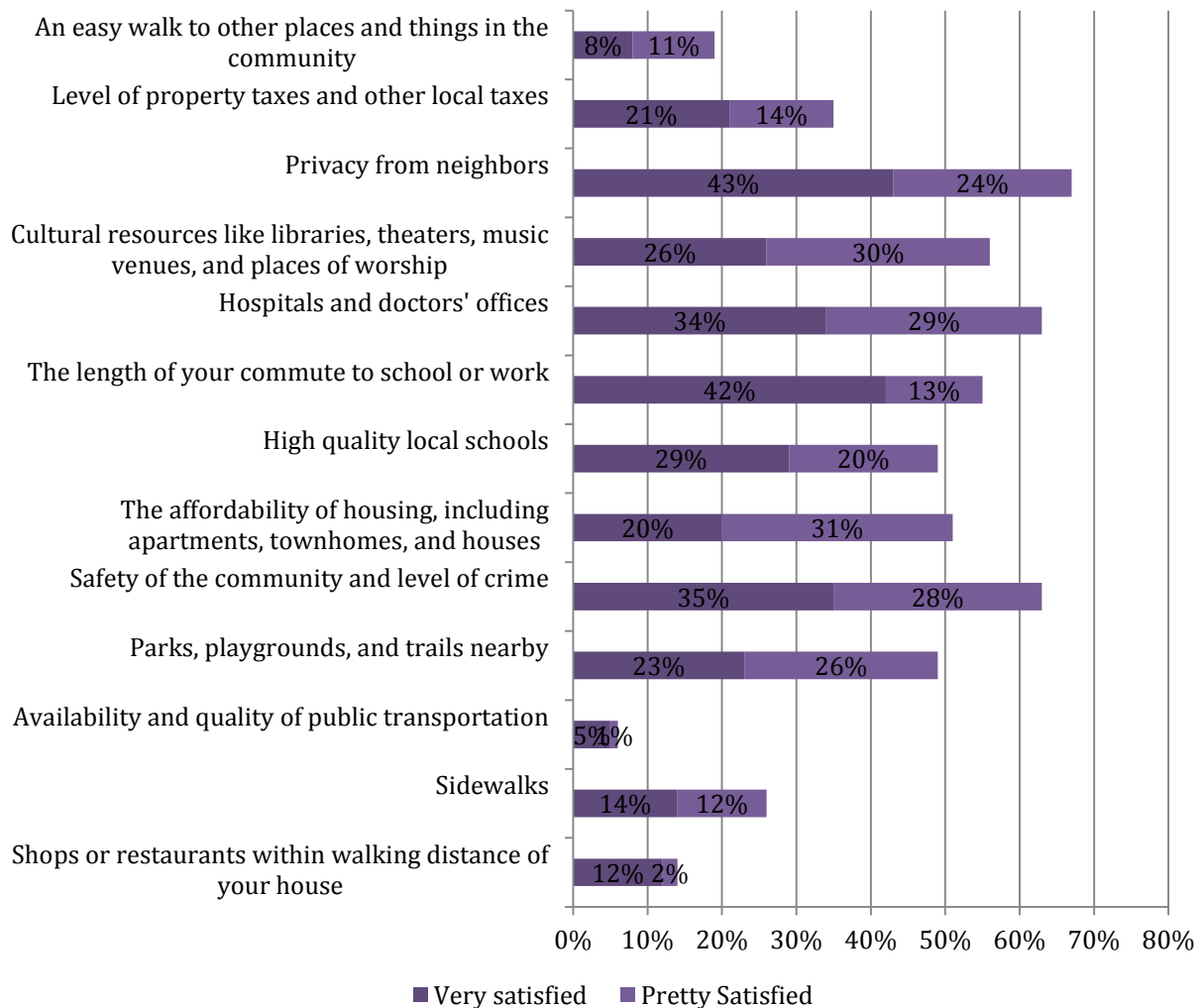
In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

Summary of Key Findings for Hamilton County

- **Most Morgan County residents report little change in their quality of life over the past three years.** A total of 54% of respondents said their quality of life has stayed pretty much the same, while 29% say it has gotten worse in the past three years. By contrast, only 15% said it has improved.
- **Morgan County residents view neighborhood qualities and house qualities equally important when deciding where to live.** 48% of respondents said housing qualities were most important while 48% gave preference to neighborhood qualities. Comparatively, 57% of adults in Central Indiana indicated that neighborhood qualities are more important when deciding where to live, while 38% said housing qualities such as size were more important.
- **Generally, Morgan County residents are most satisfied with the neighborhood features they consider most important.** That is, the higher residents rated an amenity or feature in terms of *importance*, the higher they tended to rate that amenity or feature in terms of *satisfaction*.

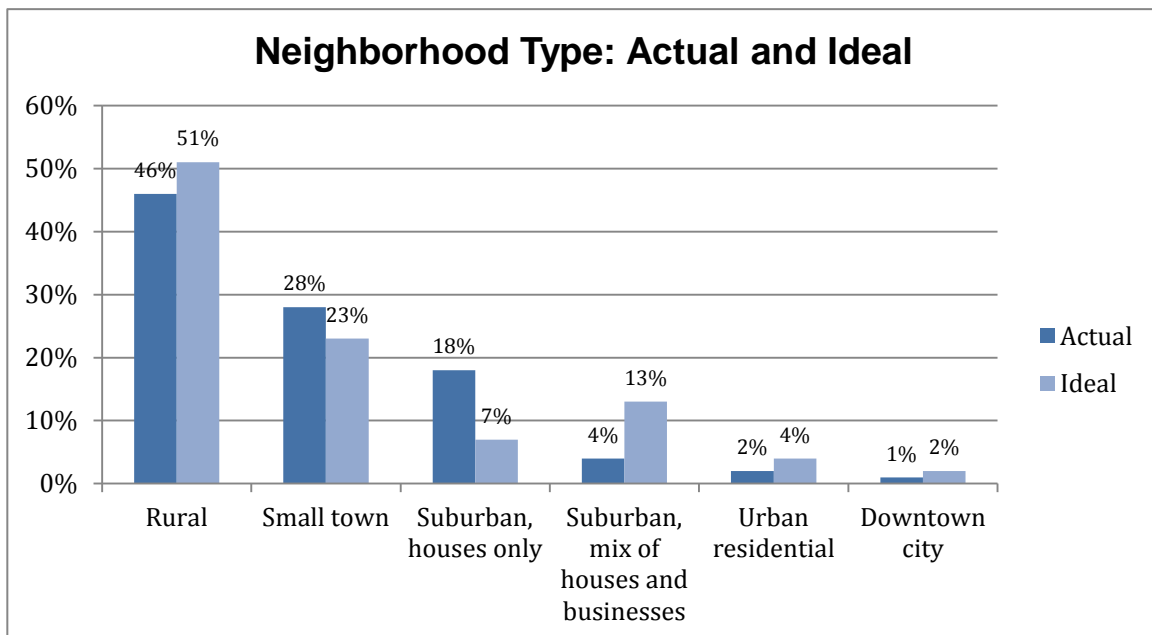
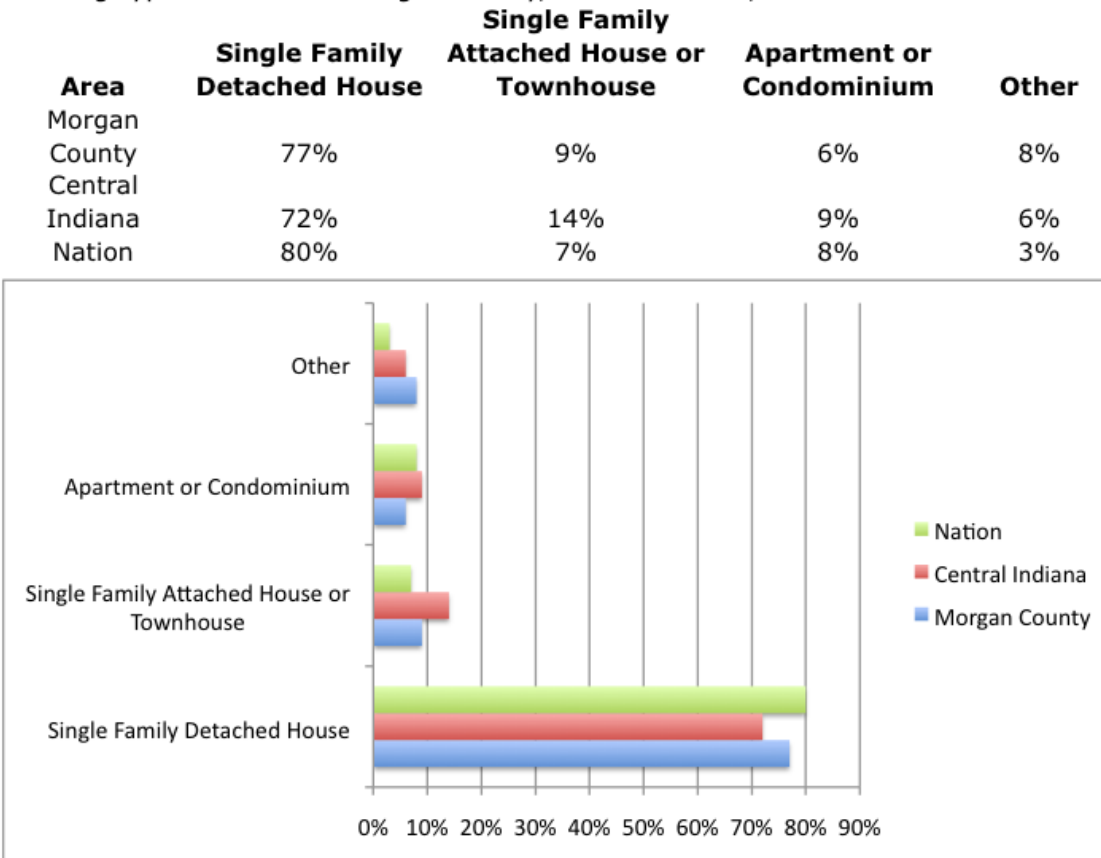
- **Far and away, the safety of the community and level of crime were the most important considerations for Morgan County residents when deciding where to live.** 70% of respondents rated public safety as a “5” on a 5-point scale (i.e. “very important”), with an additional 20% rating it a “4” out of 5.
- **Given the choice, most residents would prefer to live in a rural neighborhood.** 46% of respondents in Shelby County said they would prefer to live in a rural neighborhood. Additionally, 51% of respondents reported currently living in such a neighborhood.

Satisfaction with Amenities and Features



MIBOR Community Preference Survey
Morgan County Summary
Conducted December 12-19, 2012

Housing Type Preferences: Morgan County, Central Indiana, and the Nation



Survey Methodology

The following observations are based on a telephone survey among 1,502 Central Indiana residents. Respondents were selected based on Random Digit Dialing to both landline and cell phones in the following counties: Boone, Brown, Hamilton, Hancock, Hendricks, Johnson, Marion, Montgomery, Morgan, and Shelby. Interviews were conducted by professionally trained callers during the evenings of December 12 through December 19. Counties were sampled to be proportionally representative of the region as whole, with an oversampling in smaller counties to ensure sufficient representation (see table on right).

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Shelby	102
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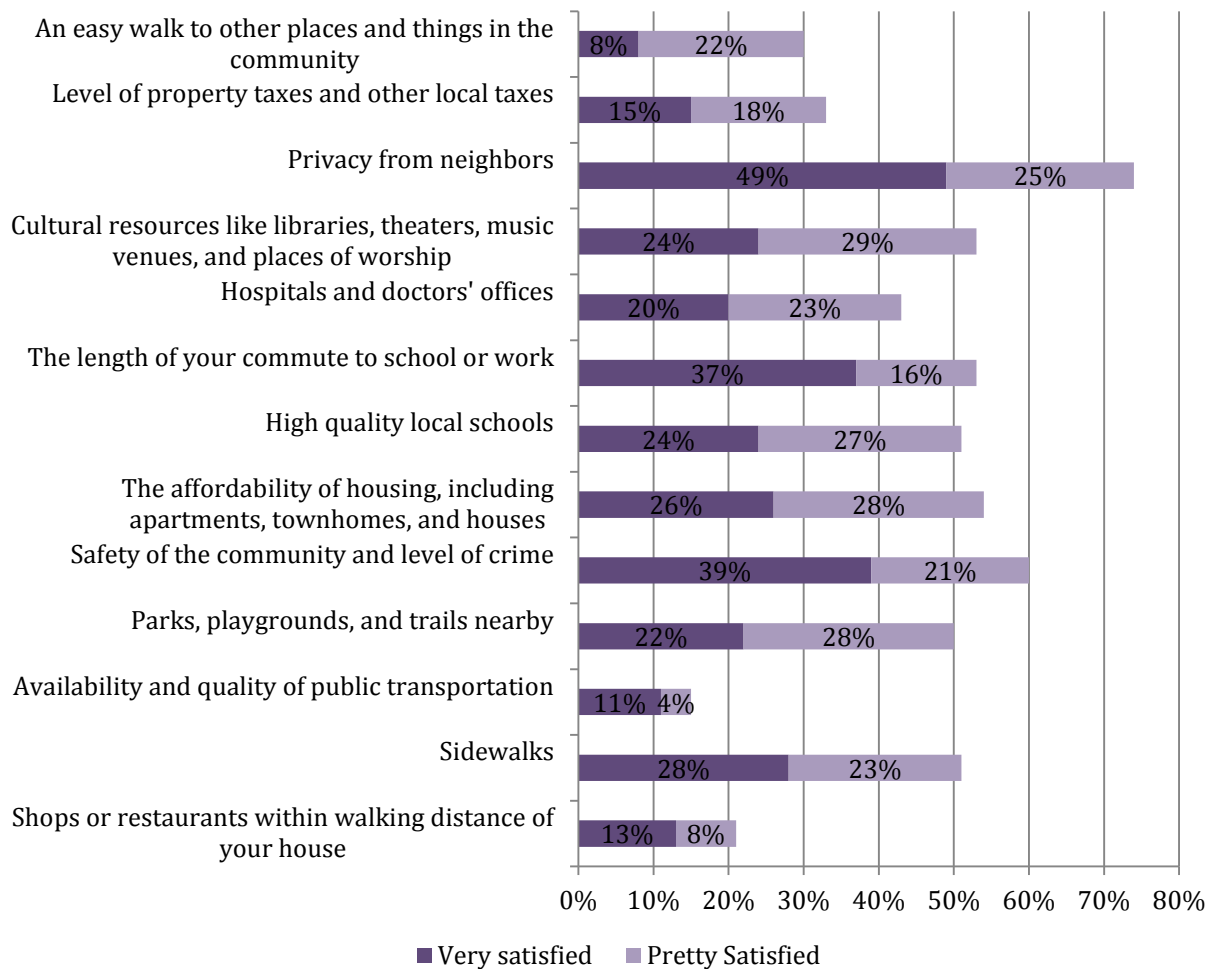
In addition to sampling error, question wording and other practical difficulties in conducting telephone surveys can introduce error or bias into these findings.

Summary of Key Findings for Hamilton County

- Most Shelby County residents report little change in their quality of life over the past three years.** A total of 60% of respondents said their quality of life has stayed pretty much the same, while 28% say it has gotten worse in the past three years. By contrast, only 9% said it has improved.
- Housing qualities and neighborhood qualities are both important to Shelby County residents.** When deciding where to live, 50% of respondents said housing qualities were more important while 44% gave preference to neighborhood qualities. Comparatively, 57% of adults in Central Indiana indicated that neighborhood qualities are more important when deciding where to live, while 38% said housing qualities such as size were more important.
- Generally, Shelby County residents are most satisfied with the neighborhood features they consider most important.** That is, the higher residents rated an amenity or feature in terms of *importance*, the higher they tended to rate that amenity or feature in terms of *satisfaction*. The big exception to this is with the level of property taxes, where 74% of respondents rated it a 4 or 5 on a 5 point scale for importance (5 = "very important"), but only 33% reported being "pretty" or "very" satisfied.

- **Far and away, the safety of the community and level of crime were the most important considerations for Shelby County residents when deciding where to live.** 74% of respondents rated public safety as a “5” on a 5-point scale (i.e. “very important”), with an additional 11% rating it a “4” out of 5.
- **Given the choice, most residents would prefer to live in a rural neighborhood.** 42% of respondents in Shelby County said they would prefer to live in a rural neighborhood. Additionally, 54% of respondents reported currently living in such a neighborhood.

Satisfaction with Amenities and Features



MIBOR Community Preference Survey
Shelby County Summary
Conducted December 12-19, 2012

Housing Type Preferences: Shelby County, Central Indiana, and the Nation

Area	Single Family			
	Single Family Detached House	Attached House or Townhouse	Apartment or Condominium	Other
Shelby County	71%	15%	9%	5%
Central Indiana	72%	14%	9%	6%
Nation	80%	7%	8%	3%

