

The Economics of Land Use



Final Report

Housing Market Preference and Demand Study

Prepared for:

The City of Oklahoma City

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1. EXECUTIVE SUMMARY

Recognizing that the City of Oklahoma City (City) should embrace its role in ensuring its housing market is competitive regionally and nationally, and to work in concert with other markets, land uses and infrastructure, the City Planning Department commissioned a study to better understand demand and preferences for housing within its municipal boundaries. Economic and Planning Systems (EPS) was hired to complete this study in 2013, the findings of which were heavily relied upon to inform and shape the 2014 Comprehensive Plan.

The Study utilized an analysis of demographic trends, a consumer preference survey, and other methods to draw conclusions. The final policy recommendations are a guide for the City to ensure that the city's future housing stock meets demand from a diversity of households, balances development opportunities with affordable options, and is linked with quality of life and economic development goals and initiatives.

Study Area

For the purposes of this analysis, Oklahoma City and its surrounding communities are divided into 13 Subareas to better illustrate resident preferences and to forecast housing demand (**Figure 1.1**).¹ The findings and recommendations of this study relate to how existing resources and new investment within these Subareas can help the City be an efficient participant in the housing market.

¹ Planning area considerations such as infrastructure needs, neighborhood distinctiveness, school district boundaries, Council Ward boundaries, major transportation corridors, and other features were consulted in the process of determining these boundaries.

Key Challenges and Findings

As demographics across the country are changing, drivers of housing demand are increasingly favoring preferences for neighborhoods with different housing types, higher-densities, mixed-use environments, and walkability to services, entertainment, and employment. In choosing where to live, households are seeking amenity- and proximity-driven housing options, or housing with a sense of place. This trend has already begun to influence development in a few parts of Oklahoma City, as evidenced by redevelopment downtown and some central parts of the city. If a substantial portion of housing demand is to be met for Oklahoma City's future residents, this trend should continue, particularly in targeted areas of the city.

Based on findings from the housing preference survey, it can be broadly stated that a key strategy for Oklahoma City will be a balancing and blending of efforts to encourage the development of both high-activity mixed-used urban environments and low density suburban ones. Several challenges and findings resulted from this study's analyses.

First, the city has an opportunity to meet the needs of a growing demographic who want more urban-style living, if not simply better and closer access to schools, shops, entertainment, and work, as seen in the survey findings detailed throughout this report. At the root of this trend is the strength and resilience of the city's economy, fueling steady employment growth and powering job retention even through the recessions of the past decade. For example, the city has not only retained a good portion of its younger residents – mainly Gen. Y, but it has also attracted young professionals from elsewhere. As this study illustrates, housing preferences of those under 45 differ from those over 45², and this carries implications for identifying an appropriate market balance between demand for high-activity mixed-used urban environments and low density suburban ones.

Second, the city faces a few challenges. One of them is for the city to continue providing services to a larger and larger urbanized area, especially since suburban development will remain a component of the market for new housing. Another, and a related challenge, is to slow the portion of households who want to leave the city for neighboring communities. While population attrition is natural and changing its course can be a fruitless if not difficult effort, the findings of the survey illustrate that there may be some areas of infrastructure improvement that could positively affect this trend. Overall, both of these challenges relate to how the city should effectively and efficiently use its resources and provide services.

The following key findings are based on a comprehensive analysis and projection of trends, conditions, as well as household's housing, neighborhood, and community preferences.

1. The city's existing housing inventory is anticipated to meet nearly 50 percent (more than 65,000 units) of estimated housing demand over the next 20 years.

The city's housing inventory, particularly Subareas in central parts of the city, should be leveraged to achieve economic sustainability. More than just a workforce development goal, economic sustainability means leveraging existing housing stock to meet future demand. As more residents demand "sense of place" in terms of housing variety, densities, and walkability to shops, services, and employment, the areas of the city that possess these characteristics will play an increasingly important role in economic sustainability.

² Refer to Figure 2.2

2. Gen X and Gen Y are anticipated to constitute more than 70 percent of all homebuyers in the next 20 years.

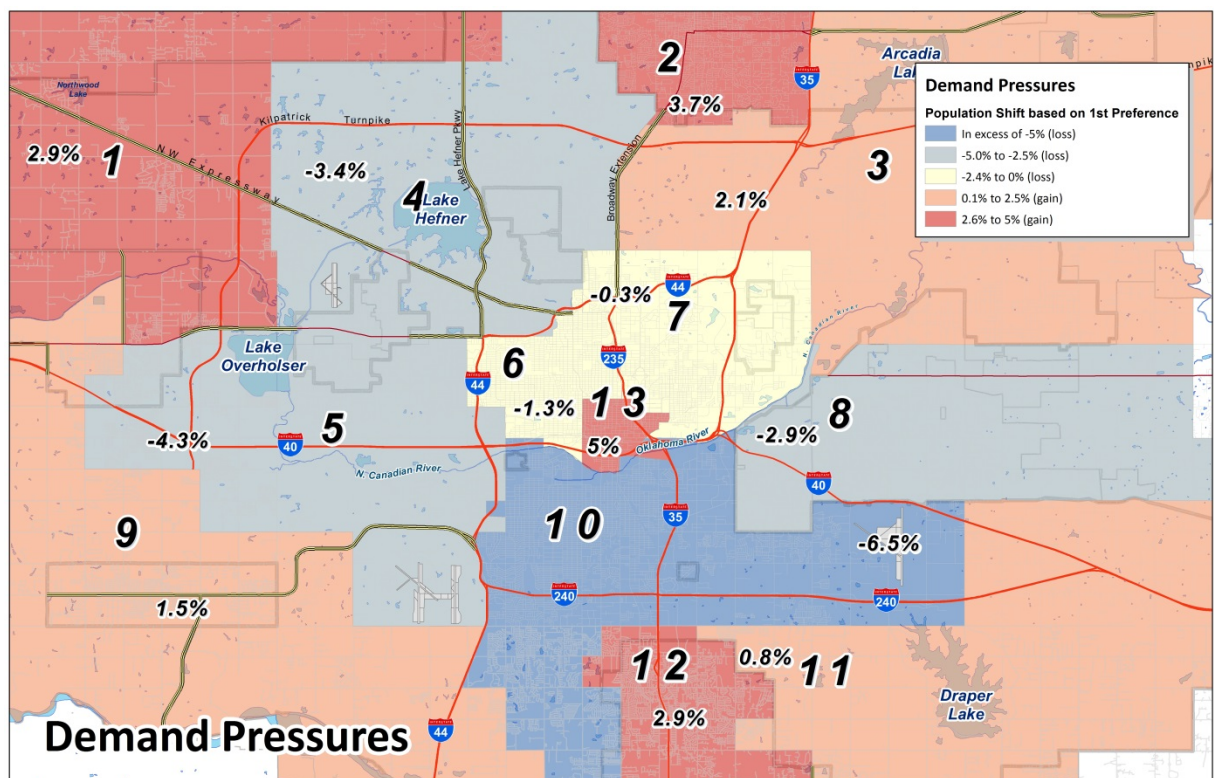
While somewhat obvious that Gen. X and Gen. Y will account for a majority of housing demand in the future, the findings of this study, which indicate that younger generations prefer housing in more urban settings, suggest that more infill and more central development may need to occur to meet their demands.

3. Nearly 15 percent of all surveyed indicate plans to leave the Oklahoma City region in less than 5 years.

In addition to the 15 percent who indicate their plans to move out of the region, another 32 percent indicate they plan to move somewhere within the region – either within the city or to Edmond, Moore, Norman, or another nearby community. For younger generations, the proportion and likelihood in moving is greater. Although some attrition is natural and unavoidable, some of this out-migration could be avoidable through planning and housing development that meets the preferences for an increasing segment of the housing market.

Figure 1.2 illustrates this outward migration based on which Subareas households say they would like to move.

Figure 1.2
Demand Pressure



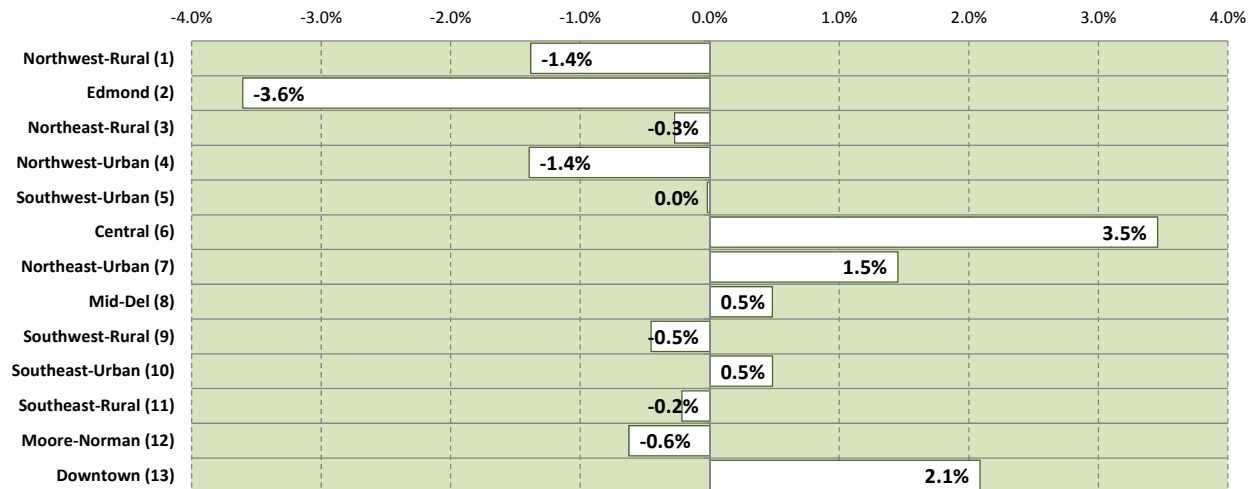
4. Nearly 80 percent of households place greater importance on neighborhood characteristics than building characteristics.

It is the quality of the neighborhood, not the size of the house, that is most important for a majority of households in choosing where to live. A neighborhood and larger community are characterized by a multitude of attributes that embody “sense of place”, such as the quality of schools, perception of safety and security, privacy, well-designed sidewalks and bike paths, access to parks, proximity to work, shops, entertainment, schools, and other daily needs.

5. Perceptions about school quality can be a strong attractant or deterrent.

School quality was the most commonly cited open-ended response when asked what would motivate households to move to a more central location. **Figure 1.3** shows the change in household dispersion between where households say they would like to live versus where they would live if school quality did not affect their decisions.³

Figure 1.3
Change in Subarea Preference When School Quality is Equal Everywhere



Source: Economic & Planning Systems

³ On the positive side of the axis, the graphic depicts the increased portion of total population that would choose to live in respective Subareas if school quality did not affect their decisions. On the negative side of the axis, the graphic depicts that population would leave these Subareas for parts of the city with additional amenities. For example, if school quality did not affect residents’ decisions, 3.5 percent more of the city’s households would choose to live in the Central Subarea (6) than they would when school quality did affect their decisions.

6. A sense of safety and security is the most important neighborhood characteristic to households.

Households identified sense of safety, security, and privacy as having greatest importance to them. Not only do they affect satisfaction with where they live, but also encourage or discourage households from choosing to live in certain parts of the city. By effecting some change in these less tangible elements of a community's infrastructure, the City may encourage growth in existing and established parts of the city.

7. City investment in infrastructure can enhance market perceptions and competitiveness, especially in established parts of the city.

Subareas 6, 7, and 10 would respond very positively to specific project and program investments, making them more attractive to households planning their next move. An analysis of the effects of project and program investment on all Subareas of the city illustrated that these areas specifically were highly receptive to investment. A full description of the analysis is found in **Appendix D**, and an overview of the methodology and the following graphic are provided below:

Note on the Methodology: Households quantified how important 14 different housing, neighborhood, and community characteristics were to them and how well each Subarea scored with respect to them. The analysis quantified how much Subarea housing demand might respond to improvements in household satisfaction level in any of the 14 characteristics.

8. Households are willing to shift their budget priorities to live in an area that contributes to their 'sense of place' and 'quality of life'.

This study's survey results show that 1 out of 6 households will pay 10 percent more in housing to cut their commute time in half; 1 out of 7 households will pay an additional 10 percent so they can walk to work or shops. As for schools, 25 percent of households will pay an additional 10 percent to get higher quality schools, and 10 percent of households will pay an additional 20 percent.

Policy Recommendations

The following key policy recommendations and actions are designed to address the challenges and findings outlined above. They are tailored to residents' preferences and values, as well as an understanding of where strategic investment will have the greatest positive economic, social, and fiscal impact.

1. Explore households' perceptions of 'sense of safety and security' in order to prioritize projects, programs, and regulations that measurably and efficiently affect safety and security.
2. Work with school districts to find the appropriate role for the City in improving education.
3. Evaluate a variety of funding sources that could be used or reallocated to achieve place-making strategies in targeted locations.
4. Prioritize locations within Areas of Transformation based on other work completed for planokc, amount and condition of publicly owned land, and/or other city initiatives.
5. Create Area Plans that highlight, walkability, and connectivity for the prioritized locations.
6. Invest in public infrastructure including sidewalks, bike lanes, trails, and transit, especially in Areas of Transformation.
7. Remove regulatory barriers to help achieve goals and/or objectives for each Area Plan, for example allowing higher densities, (re)establishing comfortable urban form, and preserving or enhancing desirable neighborhood characteristics.
8. Modify city-wide regulations to allow more opportunities for (re)establishing 'sense of place' throughout Oklahoma City.

The findings and recommendations presented in this Executive Summary are based on the research and analyses of Economic & Planning Systems that are detailed in the report chapters and appendixes below.

2. ECONOMIC AND DEMOGRAPHIC FUNDAMENTALS

The fundamentals of growth are strong in Oklahoma City, but challenges lie beneath the surface. Steady growth in employment and job creation has created opportunities for young professionals, which has helped the city retain a portion of the younger generations it could have lost. But, as detailed in the following chapters of this report, younger generations have different housing preferences and they will drive a majority of demand over the next 20 years.

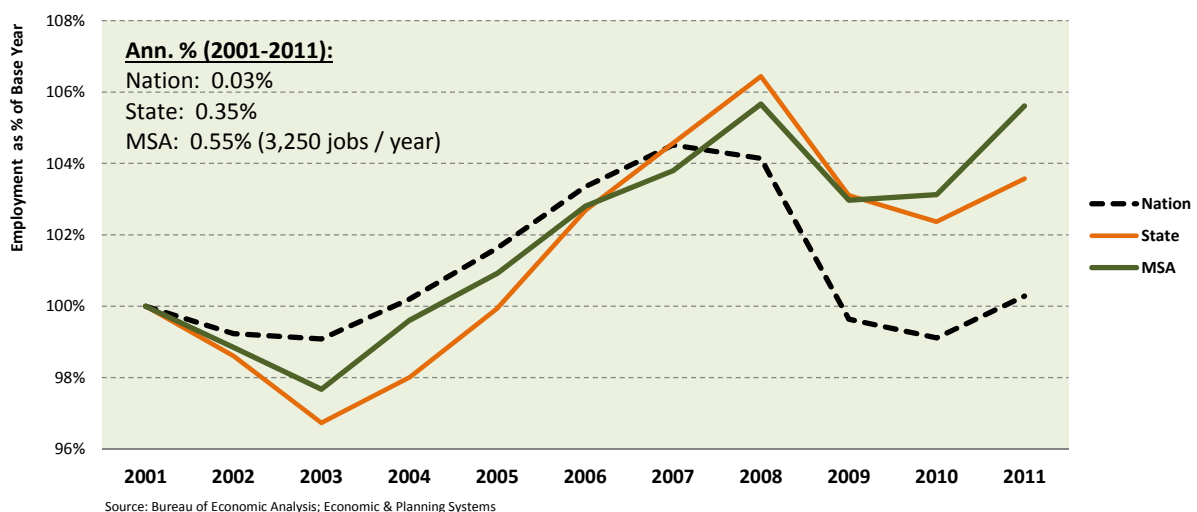
This chapter provides a framework for understanding how employment and population growth are an asset and opportunity for the city that, if captured and facilitated through increased housing opportunities that reflect the housing preferences of younger generations, will mitigate against the current out-migration of households and, thus, resources.

Fundamentals

Employment

In terms of employment gains relative to its 2001 base, the Oklahoma City MSA⁴ has come out ahead of the nation and state (**Figure 2.1**). This chart illustrates changes in employment levels using the base year as a reference point. It is important to note that since 2008 when the Great Recession's effects became more apparent, the MSA did not lose jobs to the extent that the nation or state did. Moreover, the MSA's economy has recovered from the trough of the recession with more resilience.

Figure 2.1
Wage & Salary Employment Trends, 2001-2011



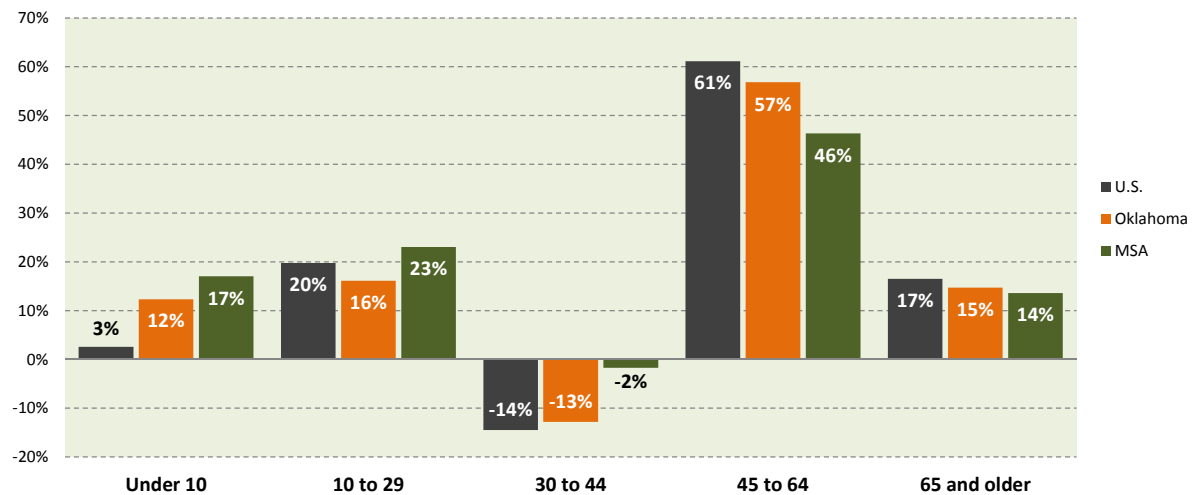
⁴ Defined as Canadian, Cleveland, and Oklahoma counties.

Population and Households

Figure 2.2 illustrates change in national, state, and regional populations by age. The age categories have been determined based on which generation various age groups fell into as of 2010. As shown and throughout this report, the definitions are as follows: under 10 are Millennials; 10 to 29 are Gen Y; 30 to 44 are Gen X; 45 to 64 are Baby Boomers; and 65 or older fall into the general pre-war categories.

In terms of growth, the Oklahoma City MSA outpaced the state and nation at 1.3 percent per year. As a portion of the state, the MSA captured 44 percent of the entire state's population growth. In terms of an age breakdown, this figure illustrates the percent of net positive population growth between 2000 and 2010 attributable to each age group.⁵ As a nation, 61 percent of population growth was attributable to 45 to 64 year olds, whereas 23 percent was attributable to population under 30. By contrast, in the MSA, 45 to 64 year-olds accounted for just 46 percent of total growth, and under 30 year-olds accounted for 40 percent.

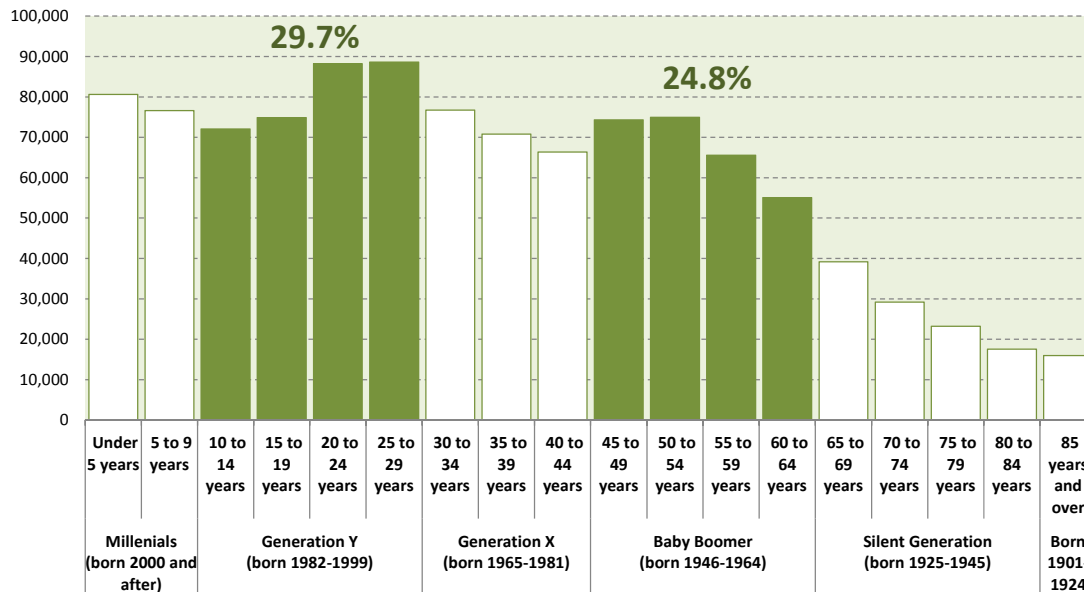
Figure 2.2
Change in Population by Generation, 2000-2010



⁵ See also **Appendix A, Table A2** through **Table A5**, for the actual population numbers and growth rates.

As a result of these trends, Gen Y is a larger portion of the population than the Baby Boomers. **Figure 2.3** illustrates the distribution of the Metro Area's population by age group. As a share of total MSA population, Gen Y accounts for nearly 30 percent, whereas the Baby Boomers account for just under 25 percent.

Figure 2.3
MSA Population by Age, 2010



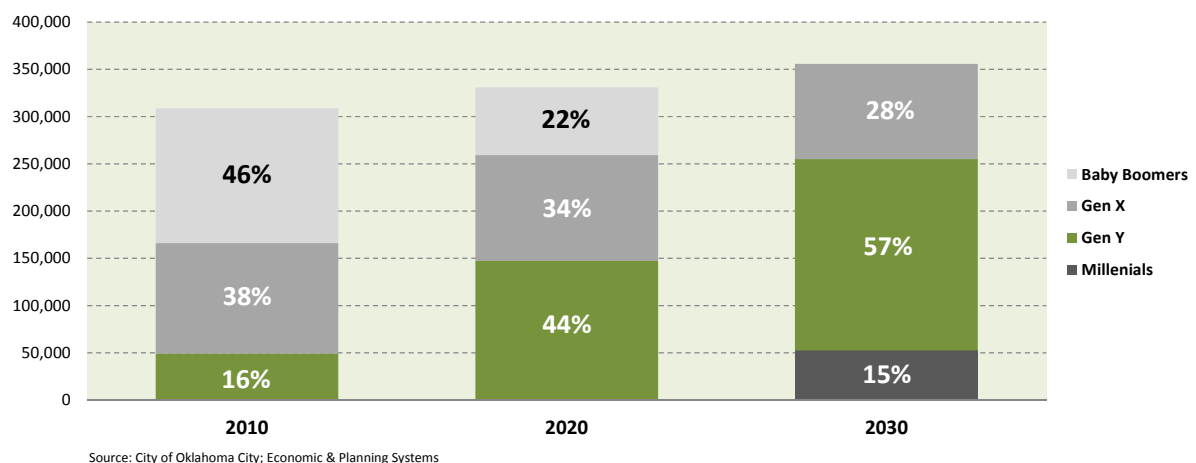
Source: U.S. Census; Economic & Planning Systems

Population Forecast

As mentioned at the beginning of this chapter, younger generations with different housing preferences will account for a majority of housing demand over the next 20 years. **Figure 2.4** illustrates the change in generational distribution of the city's population in primary home-purchasing years—between ages 25 and 64.

Currently, Baby Boomers account for nearly half of all buyers in this segment of the population, while Gen X represents 38 percent and Gen Y represents just 16 percent. Using total population forecasts prepared by the City⁶ as a baseline for growth, it is projected that Gen Y will account for 44 percent of the total home-buying market by 2020 and 57 percent by 2030. This implies that the market's response to the magnitude of changing demographics needs to account for the changing housing preferences of those future households.

Figure 2.4
Population Forecast Age 25 to 64 by Generation, 2010-2030



⁶ See **Appendix A, Table A6**

3. *SUPPLY AND DEMAND CONTEXT*

This chapter provides a framework for understanding the city's land use patterns, how they relate to household preferences, and how they may change in the future.

Housing Supply

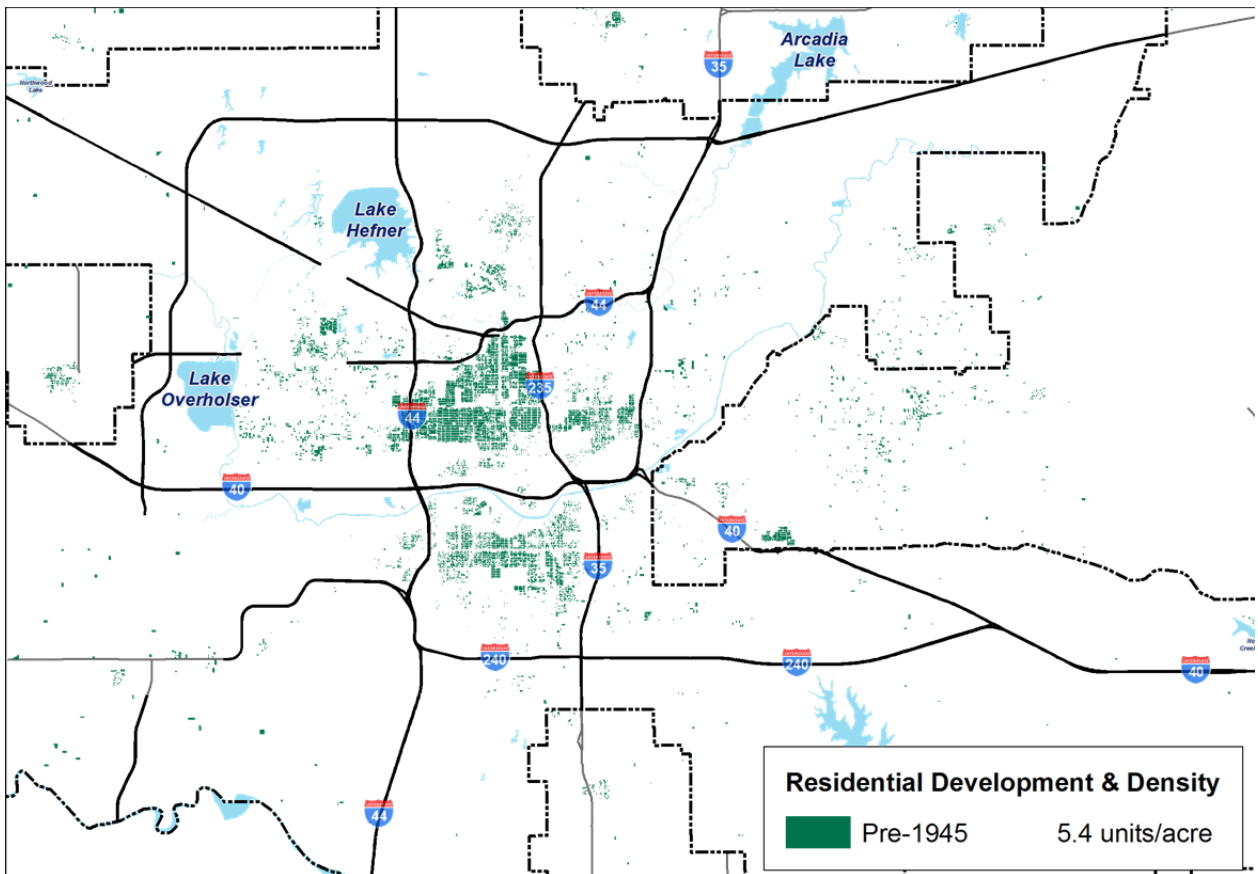
Over the past 100 years, the city experienced increasingly consumptive development patterns. The series of maps in this section depict the general outward and dispersed trajectory of growth over the past century as well as the increasing magnitude of land consumed by new housing development.⁷

Pre-1945

Figure 3.1 illustrates the location of residential development before 1945. With the exception of farmland or homesteads, most (66 percent) housing development occurred in urban areas (Subareas 6, 10, and 13). On average, development occurred at 5.4 units per acre, with Downtown at 17 units per acre and Central and Southeast-Urban at 7 and 6 units per acre, respectively. Overall, 7,465 acres (11.7 square miles) were consumed.

⁷ **Table A.1** in **Appendix A** provides greater detail.

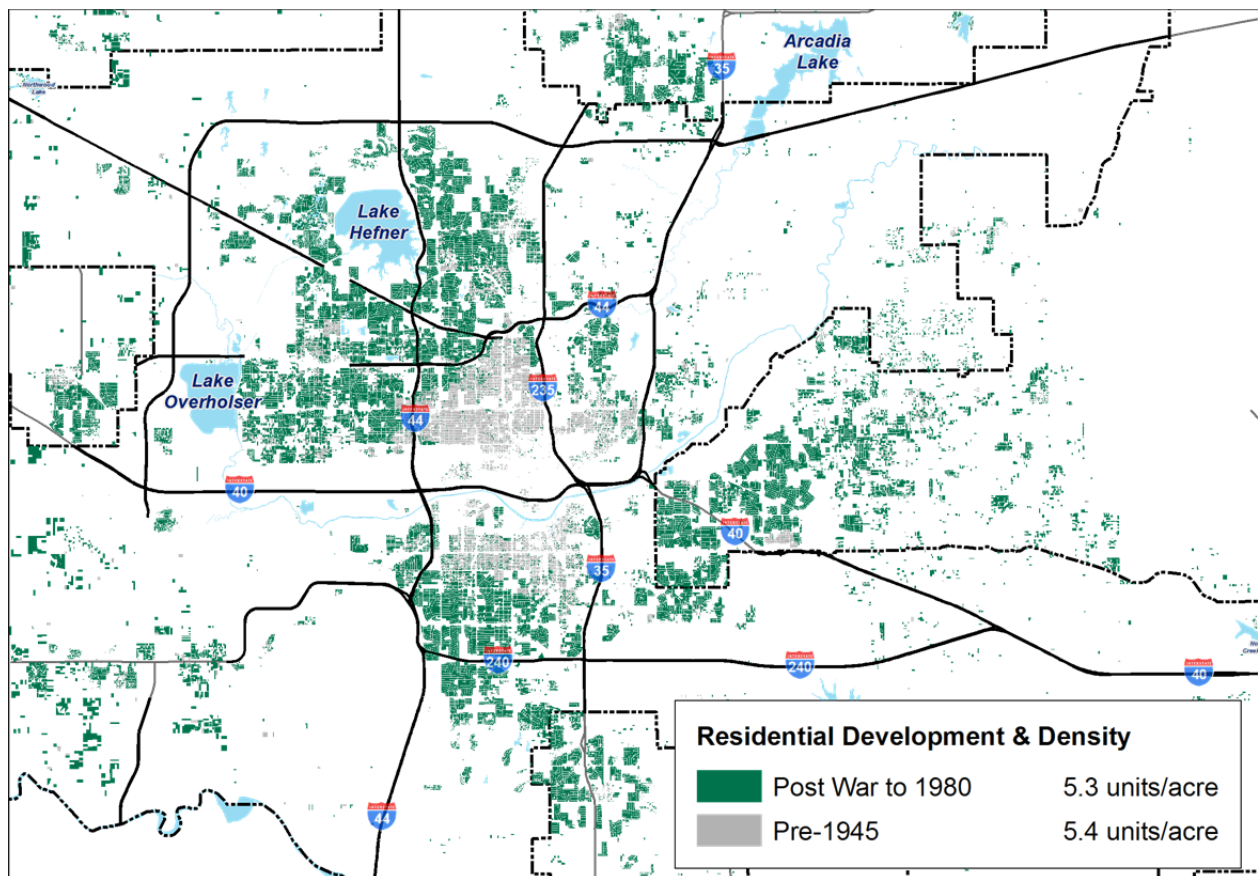
Figure 3.1
Housing Density Pre-1945



Post War to 1980

Figure 3.2 illustrates the location and densities of residential development occurring between the housing boom following the end of World War II and 1980. During this period, housing density occurred at 5.3 units per acre city-wide. In the urban areas, average development density was 6.5 units per acre and 5.4 units per acre in the suburban areas (Subareas 2, 4, 5, 7, 8, and 12). During this time, 75 percent of all housing was built in these areas, and overall, 41,800 acres (65.4 square miles) were consumed.

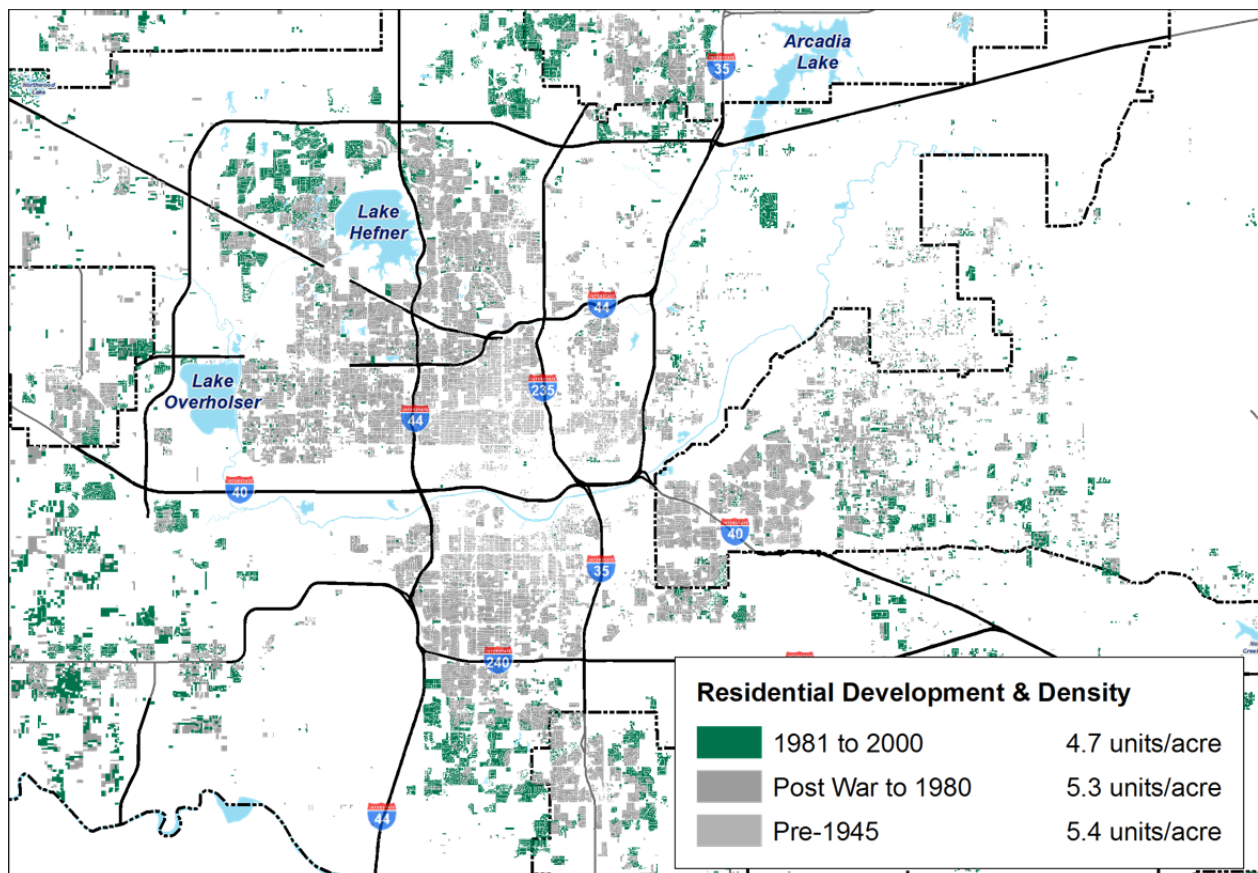
Figure 3.2
Housing Density 1945-1980



1980 to 2000

Figure 3.3 illustrates the location and densities of residential development occurring between 1980 and 2000. Overall residential development density decreased to 4.7 units per acre. During this time, overall housing development dropped to 2.7 units per acre, and caused the outward trajectory of development into Edmond (2), Northeast-Rural (3), Northwest-Urban (4), Southeast-Urban (10), and Moore/Norman (12), accounting for more than 75 percent of total city growth. Also continuing its downward trend, development density in urban areas decreased to 5.9 units per acre and density in the suburbs dropped slightly to 4.9 units per acre. Overall, approximately 22,500 acres (35.2 square miles) were consumed.

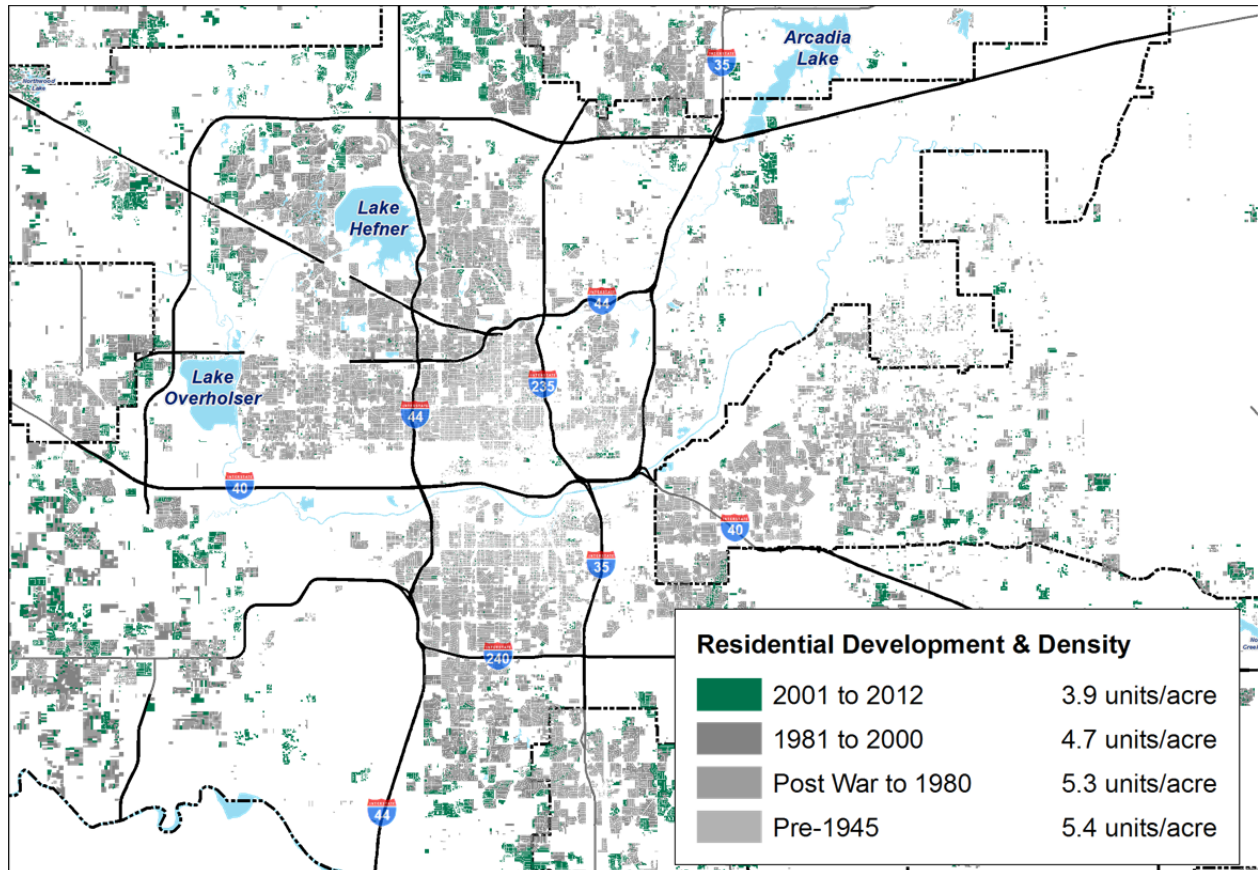
Figure 3.3
Housing Density 1980-2000



2000 to 2012

Figure 3.4 illustrates the location and densities of residential development occurring between 2000 and 2012. Average housing development density has dropped to 3.9 units per acre. While in urban areas, density increased slightly to 6.0 units per acre, average density in suburban areas decreased to 4.7 units per acre. During this period, approximately 15,800 acres (24.6 square miles) were consumed.

Figure 3.4
Housing Density 2000-Present

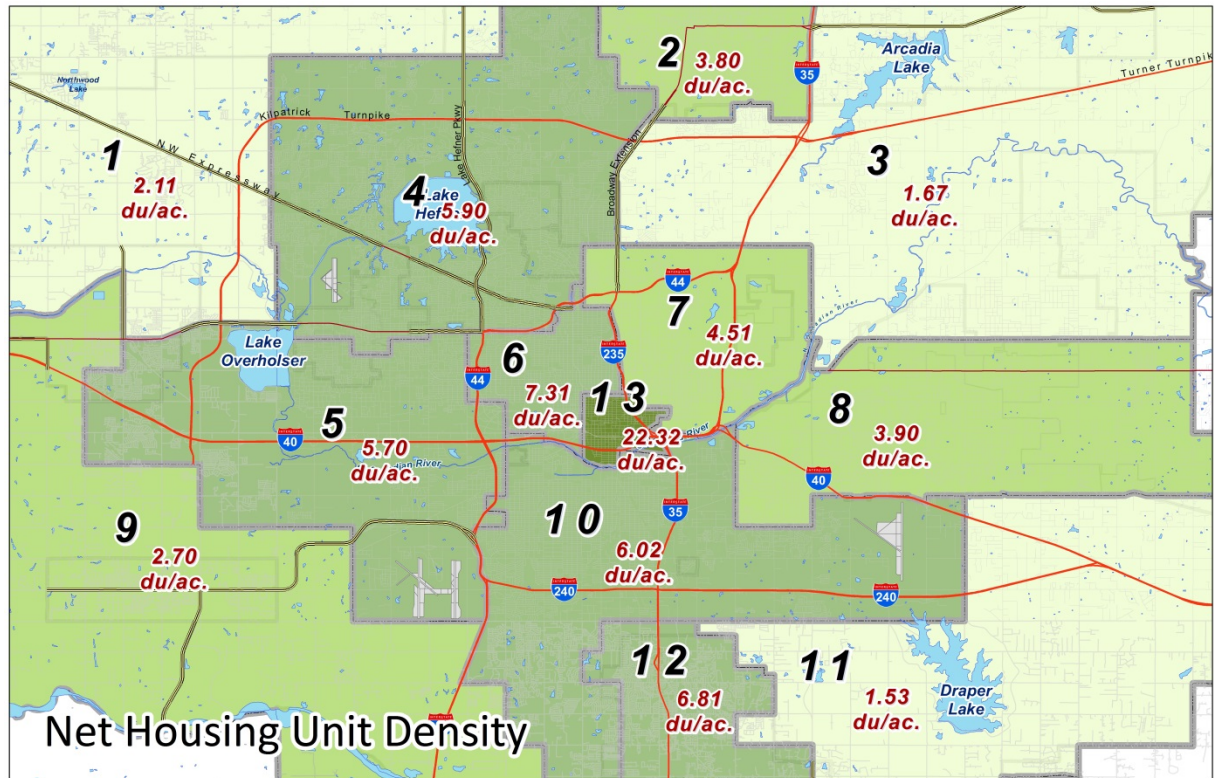


Citywide

Overall, the city is developed at approximately 4.9 units per acre, which excludes any farmland, homesteads, and non-residential properties, but includes the residential portions of mixed-use buildings. Residential development in the city has used nearly 88,000 acres or 137 square miles.

Figure 3.5 illustrates the current housing densities by Subarea that have resulted from the development patterns described above.

Figure 3.5
Current Housing Density by Subarea



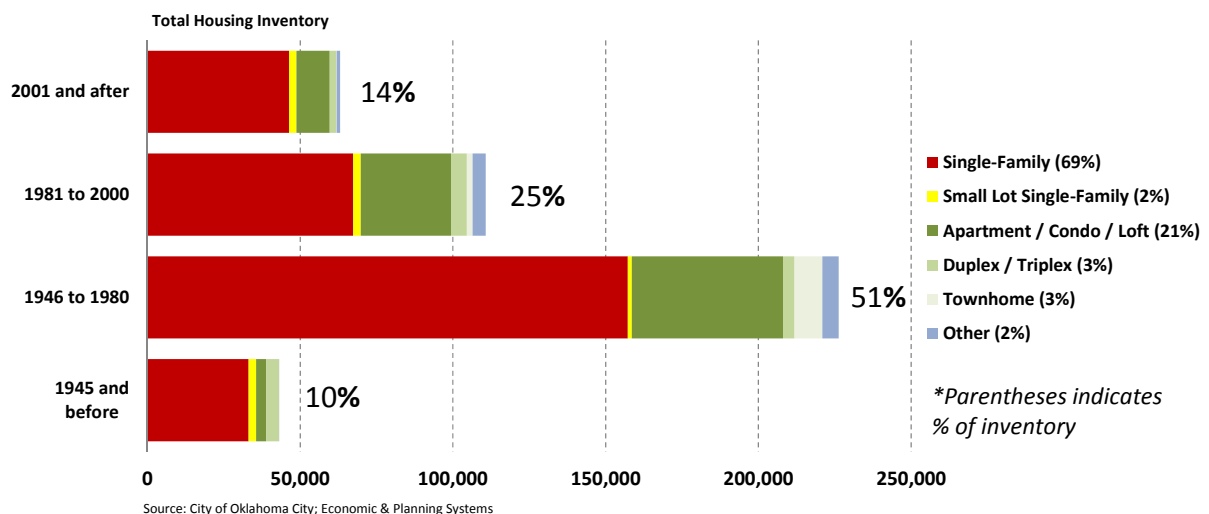
Housing Mix

There is limited housing diversity in the city. **Figure 3.6** illustrates when and what magnitude of housing types were built. Overall, 70 percent of the city's inventory is traditional single-family - homes on lots greater than 1/8th acre or approximately 5,500 square feet and apartments, condominiums, and lofts, account for 21 percent. Duplexes, triplexes, and townhomes account for the remaining 8 percent.⁸

Within the multi-family category, 53 percent of this inventory or nearly 50,000 units was built between 1946 and 1980, and 32 percent or nearly 30,000 units was built between 1980 and 2000. Since then, another 11,000 units have been built, accounting for 12 percent.

Townhomes account for just two percent of the inventory, and more than 80 percent were built between 1946 and 1980. Duplexes and triplexes account for three percent of the inventory, of which a majority was built before 1980. At one point, however, duplexes were popular, as 28 percent were built in the pre-1945 era.

Figure 3.6
Housing Inventory by Time Period



⁸ See **Appendix A, Table A7** for details.

Figure 3.7 illustrates how much of each Subarea is traditional single-family housing. In general, the remainder of inventory for each Subarea is multi-family housing, such as apartments, condominiums, lofts, duplexes, triplexes, and townhomes. As a matter of land use policy, however, it should be noted that not all Subareas should have identical proportions of each housing type. Denser housing, for example, is more suitable in urban settings, and lower-density housing is more suitable for rural areas. As a result, Subareas 1, 9, and 3, for example, will generally maintain a predominance of single-family housing, whereas Subareas 4, 6, and 13 will have greater portions of multi-family.⁹ On the other hand, as the portion of homebuyers interested in higher-density housing increases over the next 20 years, the lower proportions of multi-family housing in more urban settings could be problematic.

Figure 3.7
Housing by Subarea



Source: City of Oklahoma City; Economic & Planning Systems

⁹ See **Appendix A, Table A8** for details.

Components of Demand

Housing demand is multi-faceted and can be characterized by a variety of standard economic, locational - such as housing, neighborhood, and community preferences, socio-demographic factors - and personal, individualized preferences.

- **Economic** – A significant driver of demand can be explained in simple economic terms. From a macro perspective, housing demand is driven by employment, or other major industries that attract new households from outside the metro area.¹⁰ As local industries expand and employ more workers, or as new industries establish business and employ workers, the demand for housing will increase. From a micro perspective, housing demand is created when a new renter or owner household is formed, such as young adults moving out of parents' homes, a university student moving to the city, a worker relocating to the city, when an existing renter household has sufficient equity and income to buy a home, or when an existing owner household buys a new home in the same city.
- **Locational** – The context and setting of housing is a significant element of demand, but not in itself a creator of it; rather, locations serve to facilitate, orient, and direct where housing demand goes. Neighborhood and community-level amenities can attract, retain, or turn away housing demand. For example, a neighborhood with streetscaping and bike paths, neighborhood-scale retail, restaurants, entertainment, and an employment center may attract households. Housing demand characterized in these terms can be called "sense of place" or "sense of community". One of the major survey findings confirms that most households, specifically 80 percent (see **Figure 3.8**) choose a house on the basis of its location or neighborhood aspects. In the case of younger generations (particularly Gen Y), their preferences focus even more so on housing in mixed-use, pedestrian-scale settings. As this and younger generations age into primary home-buying ages, responding to their needs by facilitating the growth and development of urban activity centers and walkable neighborhoods could mitigate against the potential loss of these households.
- **Socio-Demographic** – This aspect of housing demand differs from city to city and can be characterized in part by the influx and presence of certain demographic age cohorts. Gen Y, for example, as evidenced by the analysis of Census data (see Table 2.1), indicated that a larger portion of the city's population growth over the past decade was attributed to this age cohort compared to state or national levels. If this trend continues, it means that much of Oklahoma City's housing demand will be defined by that age cohort's preferences.
- **Housing Types** – While the type of housing is more a characteristic of supply than demand, the absence of housing types or even a variety of housing types can be a deterrent to housing demand. For example, the Subareas of Oklahoma City that have the highest rankings for "sense of place" or "sense of community" are those that not only have established centers of activity with stores, restaurants, entertainment, and employment in close proximity, but also have a variety of housing types and at a variety of price points. This is important not only for meeting housing demands with new greenfield development, but also infill or redevelopment areas.

¹⁰ The Oklahoma City metro area is defined as including Edmond, Moore, Midwest City, Del City, Norman, Yukon, and other nearby cities and unincorporated areas.

- **Schools** – The presence of quality schools in proximity to housing is one of the more significant drivers of housing demand. Although improving the quality of schools is not within the City's direct control, ensuring and planning for the development of housing in walkable neighborhoods with services and amenities close to existing or future schools is. In the survey, when asked whether the size of a house, the neighborhood, or something else was most important in deciding where to live, quality of schools was the most commonly-cited definition of "something else". There was also consensus around the need to improve the quality of junior and high schools in the city's central areas.
- **Other Preferences** – The survey responses indicate that households find "sense of privacy" and "sense of safety and security" very important aspects of where they live. Sense of privacy concerns seem to be more important to older age cohorts than younger ones (see **Appendix B**). There seems to be a reverse relationship between sense of privacy and the desire to be in a place that's at the center of it all. Younger age cohorts generally view sense of privacy as less important to their housing preferences than older age cohorts do, who seemed to be the primary driver of demand behind lower-density housing development at the outskirts of the city. Sense of safety and security seems to be equally important to all age cohorts.
- **Trade-offs** – Implicit in all of the considerations above are trade-offs. Housing demand has always been characterized by the presence of them, but the survey findings indicate an emerging segment that will shift away from historic trade-offs who favored bigger houses and greater sense of privacy but often fewer locational amenities and toward trade-offs that favors a smaller house or a smaller lot with locational amenities, such as centers of activity with retail, restaurants, entertainment, and employment. One key difference between these two types of trade-offs is the cost associated with travelling to centers of activity. In the historical example, a household that favors a larger house with more privacy located further from the city drives farther and more frequently to shops, restaurants, entertainment, and work, whereas the household in the latter example doesn't. Also as indicated in the survey results, households are willing to pay more for housing with walkability, because they can capitalize the cost of transportation into the house.

Estimating Demand

Housing demand can also be estimated using a variety of techniques. Some of the more common approaches involve making projections of other known or familiar trends, such as employment and population or households. When projecting demand by Subarea, such as in this study, projections of building permit activity can be applied at the Subarea level with build-out assumptions to limit potential development or infill, as well as assumptions about potential redevelopment densities.

In this study, we have generally taken a behavioral/preference approach to projecting housing demand. In brief, these projections use the following pieces of basic information to forecast housing demand by type by Subarea:

- Household preference and value information for the 14 housing, neighborhood, and community attributes;
- Household satisfaction levels for the 14 attributes in each Subarea;
- Household stated rankings of preferred Subareas
- Portion of households very likely to be moving over the course of the 20-year period

Housing and Neighborhood Characteristics

This section describes the level of preference and values households in Oklahoma City place on various housing and neighborhood characteristics. Starting from a high level and narrowing in on the specifics about each characteristic, the findings of the survey elucidate several key components of demand, such as the:

- Type of neighborhoods that households are looking for;
- Variety of neighborhood characteristics that households value;
- Extent to which needs are being met with respect to these values;
- Differences between generational preferences; and
- Differences between households that plan to leave the region and those that do not.

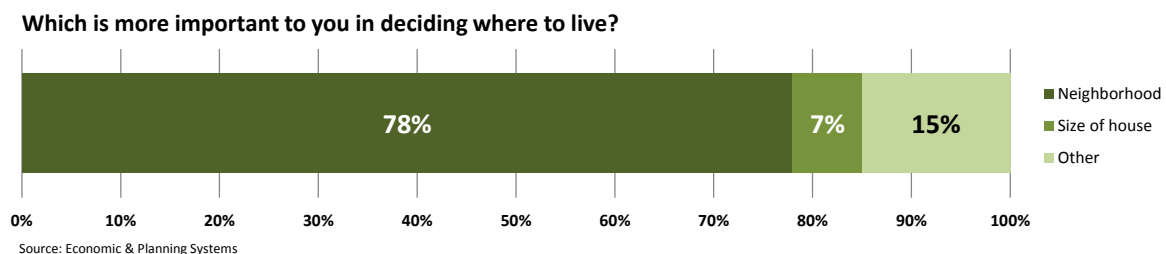
This section also describes households' willingness to pay for characteristics that seem lacking or unsatisfactory, such as proximity to schools, shops, entertainment, or recreation. In general, these findings begin to quantify and qualify what "sense of place" means for residents of Oklahoma City.

What Matters Most

When asked whether the neighborhood, the size of a house, or something else is most important in deciding where to live, nearly 80 percent of households said the neighborhood is most important (**Figure 3.8**).¹¹ Only 7 percent indicated that the size of the house was most important, and 15 percent indicated that something else, or "other", was most important. As mentioned previously, the most commonly-cited explanation for "other" in the open-ended responses was quality of schools.

As will become clearer later in this section, the definition of neighborhood is multi-faceted. It can include a variety of tangible and intangible elements, such as streetscaping, diversity of housing products, sense of safety and security, privacy, being able to walk to schools, stores, and restaurants, etc. And while each of these aspects plays an important role in a household's overall value and perception of their neighborhood, these household value sets or profiles differ by generation.

Figure 3.8
Neighborhood vs. Home Size in Deciding Where to Live



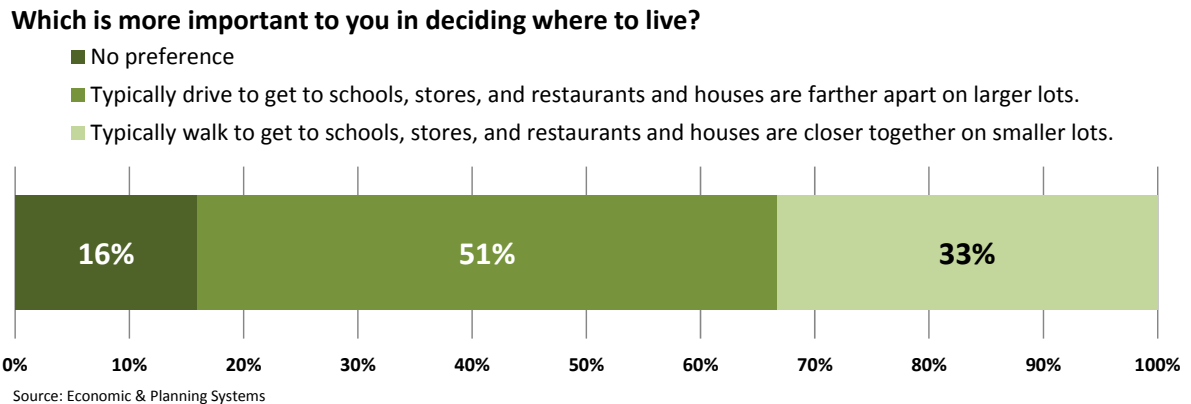
¹¹ See **Appendix A, Figure A1** for detail by age category.

Drivable vs. Walkable Neighborhood

One of the higher level distinctions that can be made between types of neighborhoods is the drivable versus the walkable neighborhood. A drivable neighborhood is defined as one where a household lives in a large house on a large lot but drives to work, school, stores, and restaurants. A walkable neighborhood is where a household lives on lots closer together, but walks to school, stores, and restaurants.

Figure 3.9 shows that approximately 1 out of 3 Oklahoma City households would prefer to live in a smaller house and be able to walk to schools, stores, and restaurants than live in a larger house and have to drive to these places. At current population levels, that would imply that more than 190,000 residents would prefer to live in a walkable neighborhood; by 2030, this ratio would imply that more than 250,000 residents would prefer this. Survey findings also show that a slightly larger proportion of younger generation households would prefer to live in a walkable neighborhood.¹²

Figure 3.9
Walkable vs. Drivable Neighborhoods Preference

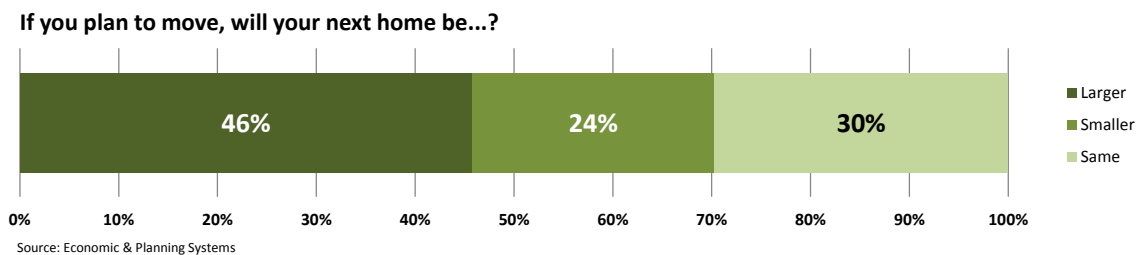


¹² See **Appendix A, Figure A2** for detail by age category.

Size of Next Home

Although not as important to the overall decision, the size of house does and will continue to play a role in household's decisions. To gauge how households are envisioning their next move, a different question asked households to identify whether they wanted a larger or smaller house in the next move. **Figure 3.10** illustrates that while nearly half indicate they would like their next home to be larger, approximately 25 percent would like it to be smaller, and 30 percent would like it to be about the same as their current residence. Interestingly, the pattern of wanting a larger house generally diminishes with age.¹³ Whether for reasons relating to household formation, income, employment status, or others, as people age the desire in for a larger house generally decreases.

Figure 3.10
Size of Next House



Housing Type Preferences

As the previous section on housing supply made clear, the city's housing market has been defined predominantly by the single-family house on 1/8th of an acre or greater. And although there is diversity in the styles of single-family housing throughout the city and throughout the different eras of construction, there is little diversity of other housing products.

Because of this lack of housing diversity, questioning households in the survey required a visual approach, in which images of less familiar product types were shown. **Figure 3.11** illustrates the five types of housing product, ranging from traditional single-family to two types of mid-rise multi-family housing, used to gauge receptivity to new product types and levels of desirability.

Unsurprisingly, 80 percent rated single-family as somewhat and very desirable, but more than 70 percent also rated the small lot single-family as somewhat and very desirable. **Figure 3.12** shows that younger generations like Gen Y rank multi-family products far more favorably than older generations did (see also **Figure B70** through **Figure B75** in **Appendix B**). In fact, Gen Y tends to view traditional single-family product more negatively than any other housing product. For example, 18 to 24 year-olds view both mid-rise multi-family projects nearly twice as desirable as all survey-takers, whereas their enthusiasm for the single-family product was only marginally greater than the older generations, if not lower in one of the cases.

¹³ See **Appendix A, Figure A3** for detail by age category.

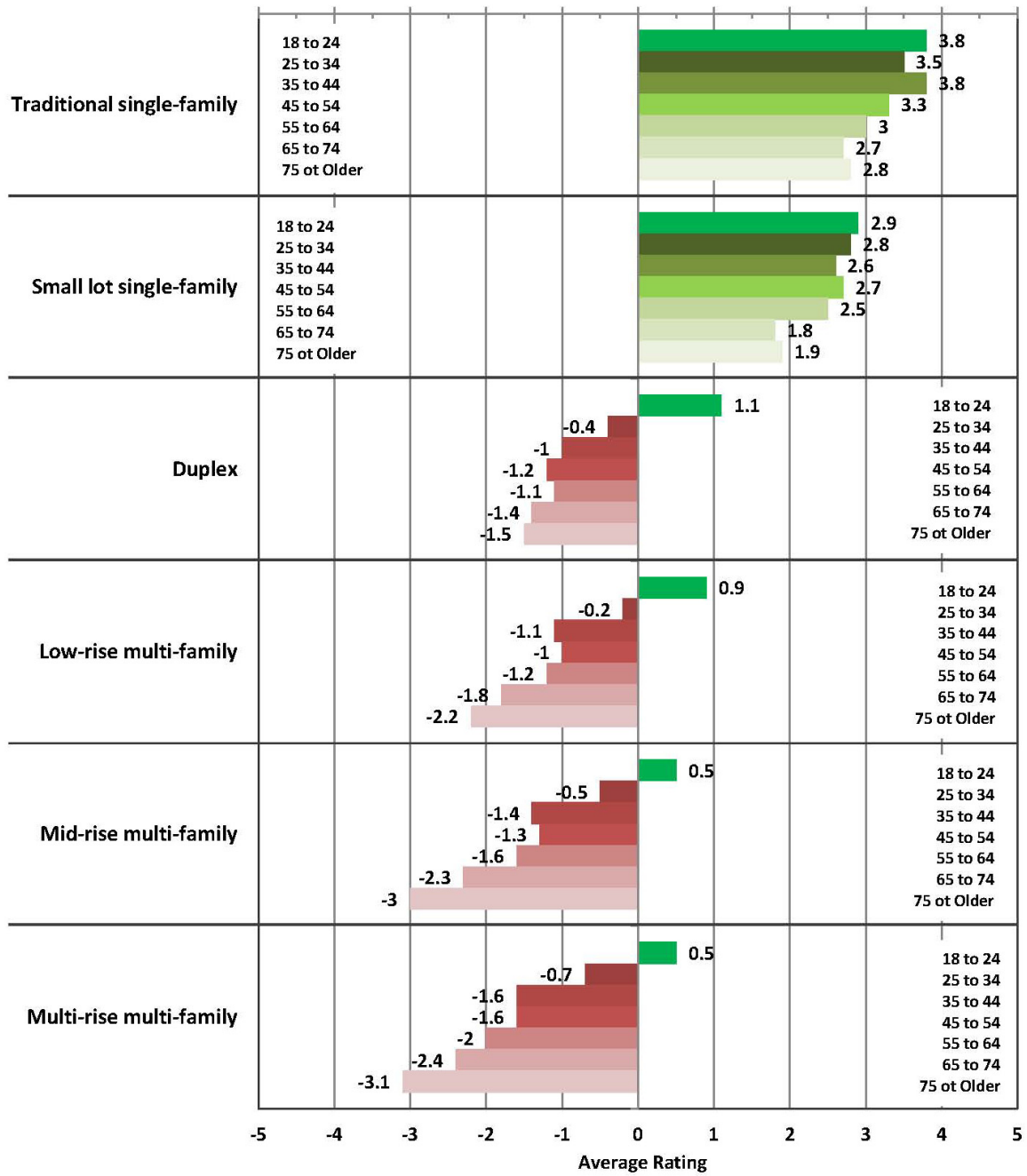
Figure 3.11
Image Preferences

HOUSING IMAGE PREFERENCES

The following six images show types of housing that may or may not be currently available in Oklahoma City. How desirable is this type of home for you and your family? Using the scale please provide your reaction by rating each image from -5 to 5. (CIRCLE YOUR SELECTIONS)

Mid-Rise Multi-Family  Very Undesirable Somewhat Undesirable Neutral Somewhat Desirable Very Desirable -5-4-3-2-1012345 Mid-Rise Multi-Family  Very Undesirable Somewhat Undesirable Neutral Somewhat Desirable Very Desirable -5-4-3-2-1012345 Low-Rise Multi-Family  Very Undesirable Somewhat Undesirable Neutral Somewhat Desirable Very Desirable -5-4-3-2-1012345	Duplex  Very Undesirable Somewhat Undesirable Neutral Somewhat Desirable Very Desirable -5-4-3-2-1012345 Traditional Single-Family  Very Undesirable Somewhat Undesirable Neutral Somewhat Desirable Very Desirable -5-4-3-2-1012345 Small Lot Single-Family  Very Undesirable Somewhat Undesirable Neutral Somewhat Desirable Very Desirable -5-4-3-2-1012345
<i>Please provide any additional comments you may have regarding the six housing images in the space provided below:</i>	

Figure 3.12
Housing Type Preference Scores by Age



Housing, Neighborhood, and Community Attributes

The findings of this section point to what households consider important and to what degree. They identify what aspects of housing, neighborhoods, and community are important and how well these characteristics are meeting needs. To illustrate which aspects the city might be able to improve upon through project or program investment, differences of preference between households that intend to stay in the city and those that intend to leave are shown. Other cross-tabulations of the findings, such as importance and satisfaction levels by age and by Subarea are provided in detail in **Appendix B**.

What is Important?

Figure 3.13 illustrates how households rank housing, neighborhood, and community characteristics. The percentages shown reflect the portion of households who feel each characteristic is “very important”. Overall, sense of safety and security, price, sense of privacy, curb appeal/construction quality, a short commute to work, and well-designed sidewalks and bike paths are most important to households.

On the other end of the spectrum, contemporary/recent construction and historic character rank on the bottom of the list of important features. And as with many other results of preference questions in this survey, there are differences between age groups, but there are also differences between the group of households who say they are very likely to move out of the region in the next 1 to 5 years, and those who say they are going to stay or move within the City.

Figure 3.13
Importance of Various Characteristics

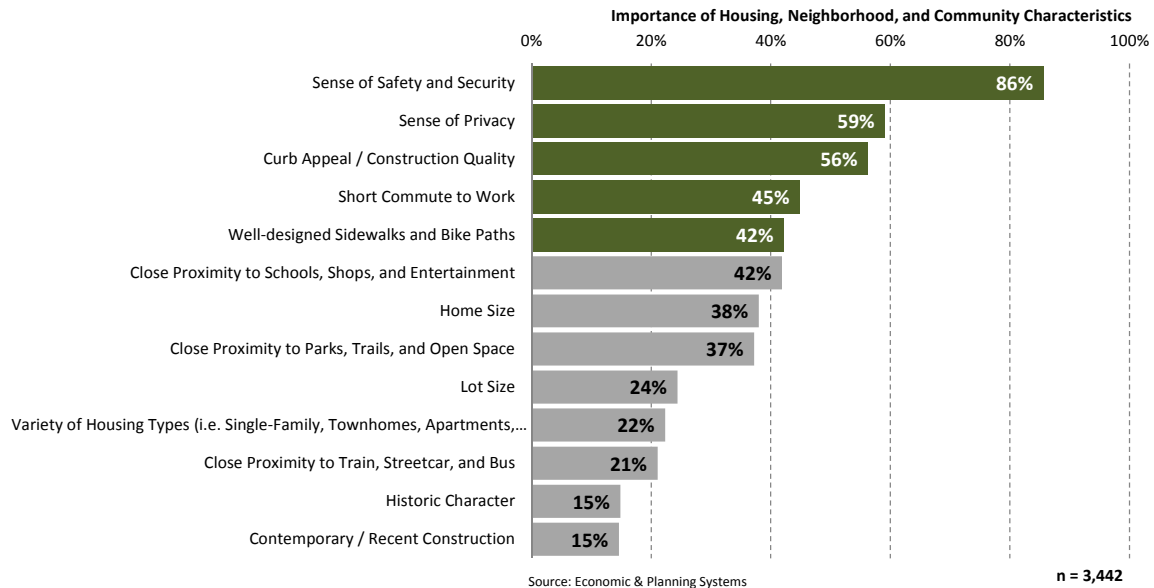
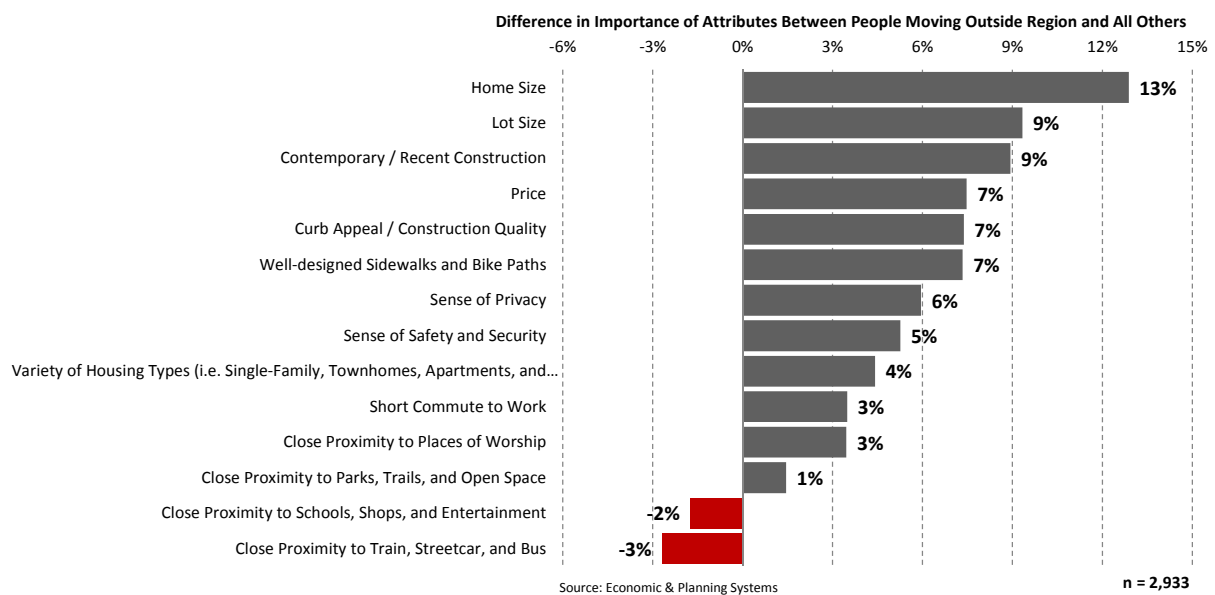


Figure 3.14 illustrates differences in the values of households intending to leave the city and those intending to stay. Positive percentages identify where a greater portion of households wanting to leave view an attribute as more important than households wanting to stay. For example, households intending to leave the city view home size as 13 percent more important than households that intend to stay. Among the more tangible characteristics, lot size, contemporary/recent construction, price point, construction quality, and sidewalks and bike paths are all more important to these households. Also more important are some of the less tangible characteristics, such as sense of privacy, and safety and security. On the other hand, two characteristics are less important to these households: proximity to schools, shops, and entertainment, and proximity to public transportation.

Figure 3.14
Preference Differences Between Households Leaving and Staying



Characteristics Meeting Household Needs

Oklahoma City households are generally more satisfied with their housing traits than they are with neighborhood features or community characteristics. **Figure 3.15** illustrates the extent to which households identified what housing, neighborhood, and community characteristics are meeting needs – completely and somewhat. The results are ranked according to extent of complete satisfaction.

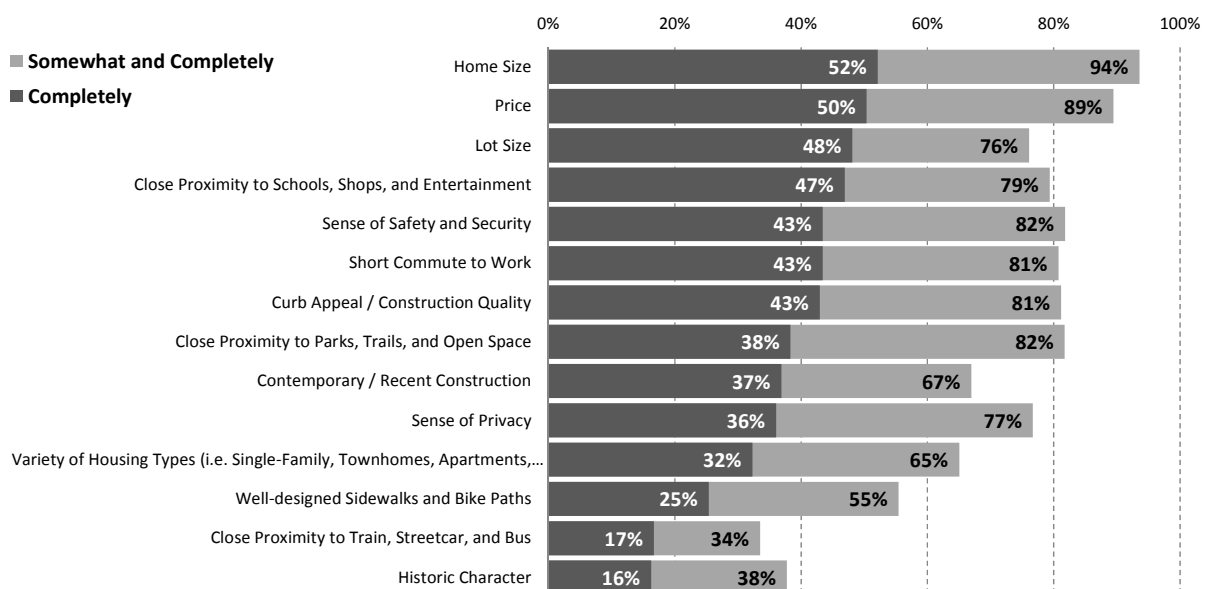
Overall, nearly all households are satisfied completely and somewhat with their home size and price. While approximately 80 percent were completely and somewhat satisfied with lot size, proximity to schools/shops/entertainment, safety and security, short commute to work, curb/appeal and construction quality, and proximity to trails an open space, less than half of all households were completely satisfied with any of these.

Among the items households are least satisfied with are sense of privacy, variety of housing types, well-designed sidewalks and bike paths, proximity to transit, and historic character.

As mentioned previously, the results of this analysis are presented in **Appendix B** cross-tabulated by age category as well as by Subarea. Those results show where age groups differ from one another, revealing what aspects of housing, neighborhoods, and the larger community are more important. They also reveal which Subareas are succeeding at meeting households' needs and which are failing.

For example, less than 10 percent of households in Southwest-Urban (5), and Central (6), and Northeast-Urban (7) are completely satisfied with sidewalks and bike paths. And less than 25 percent of households in Subareas Northwest-Rural (1), Northeast-Rural (3), and Southwest-Urban (5) are completely satisfied with their commute to work.

Figure 3.15
Satisfaction with Community, Neighborhood, and Housing Characteristics



Source: Economic & Planning Systems

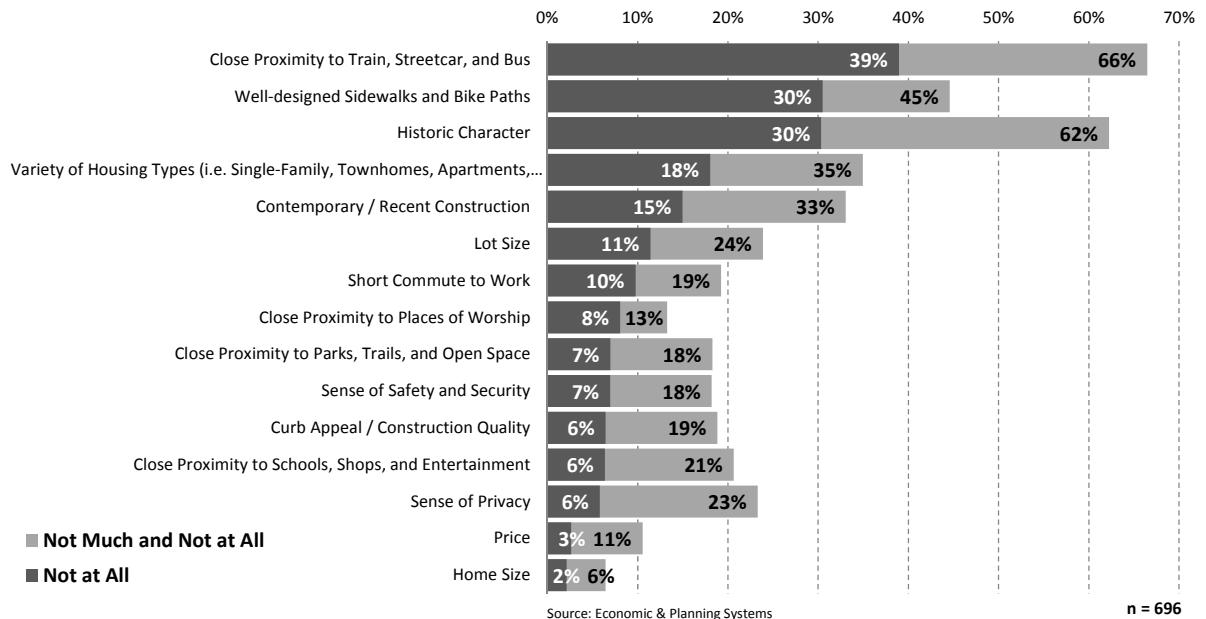
n = 696

Characteristics Not Meeting Household Needs

The other side of the story shows to what extent the community is dissatisfied with various neighborhood and community attributes. These are important considerations, because they help in determining what areas of improvement the City should focus on as it plans for future investments.

Figure 3.16 shows that at the top of the list is proximity to train, streetcar, and bus. While the City is only in the initial phases of building its streetcar, this question generally reveals household dissatisfaction with their proximity to existing bus service. Among other community and neighborhood infrastructure where the City may make direct investment is in its sidewalks and bike paths. Nearly half of households indicate they are “not at all” or “not very much” satisfied with them.

Figure 3.16
Dissatisfaction with Community, Neighborhood, and Housing Characteristics



Subarea Disconnects

While the detail of what households find important and what they perceive to be meeting their needs by Subarea are presented in **Appendix B**, the differences between these two ratings, or their disconnects, are presented below. These disconnects are important to identify because they will assist the city in determining where project and program investment needs to be made. **Table 3.1** illustrates a scale that identifies in red where there are large disconnects between the value households place on an attribute and in green where satisfaction exceeds level of importance. Those figures highlighted in green identify where households satisfaction exceeds how important they view that attribute.

There are five attributes that reveal a nearly consistent disconnect between what households value and how well their Subareas are meeting this need – price, curb appeal, sidewalks and bike paths, sense of privacy, and sense of safety and security. The largest disconnects exist in the following subareas for these attributes: price in Southwest-Urban (5); curb appeal/construction quality in Northeast-Rural (3); well-designed sidewalks and bike paths in Northeast-Urban (7); sense of privacy in Southwest-Urban (5); and sense of safety and security in Southwest-Urban (5).

Table 3.1
Disconnect Between Value and Satisfaction by Subarea

Characteristic	Subarea										
	Northwest-Rural (1)	Northeast-Rural (3)	Northwest-Urban (4)	Southwest-Urban (5)	Central (6)	Northeast-Urban (7)	Southwest-Rural (9)	Southeast-Urban (10)	Southeast-Rural (11)	Downtown (13)	Total
Home Size	26%	17%	-7%	-3%	10%	4%	-13%	-6%	16%	33%	4%
Lot Size	12%	25%	11%	3%	25%	14%	-16%	9%	-13%	0%	12%
Contemporary / Recent Construction	23%	33%	0%	15%	0%	10%	37%	14%	24%	-6%	14%
Price	-18%	-27%	-29%	-49%	-43%	-5%	-32%	-44%	-8%	-57%	-30%
Curb Appeal / Construction Quality	-22%	-41%	-27%	-30%	-27%	-29%	-12%	-29%	2%	-23%	-15%
Historic Character	9%	18%	14%	12%	6%	10%	3%	6%	14%	-2%	2%
Well-designed Sidewalks and Bike Paths	-6%	-14%	-16%	-29%	-33%	-54%	27%	-21%	2%	-37%	-15%
Sense of Privacy	-13%	-24%	-41%	-44%	-8%	-22%	-40%	-41%	-29%	-10%	-32%
Sense of Safety and Security	-34%	-47%	-50%	-61%	-39%	-41%	-31%	-49%	-36%	-51%	-42%
Variety of Housing Types	22%	19%	13%	5%	-8%	4%	29%	5%	22%	-29%	10%
Short Commute to Work	-4%	-12%	-18%	-6%	-32%	-11%	-5%	7%	13%	-17%	-4%
Close Proximity to Places of Worship	22%	3%	16%	-8%	25%	-3%	12%	7%	30%	16%	12%
Close Proximity to Parks, Trails, and Open Space	7%	-9%	-12%	-22%	-3%	-30%	37%	3%	11%	-2%	4%
Close Proximity to Schools, Shops, and Entertainment	2%	-10%	19%	-6%	-8%	-24%	33%	10%	8%	-17%	7%
Close Proximity to Train, Streetcar, and Bus	-13%	-13%	-6%	3%	13%	-19%	-2%	-1%	6%	17%	-4%

Source: Economic & Planning Systems

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Willingness to Pay

Housing markets across the U.S. are adopting the mindset that proximity to transit is an amenity for which there is a willingness to pay. In reality, the less income households spend on commuting to and from daily activities, the more they have to spend on other things, including but not limited to housing, recreation, savings, food, etc. As this section will evaluate, Oklahoma City's households are also willing to pay more for housing to achieve improvements in another aspects of their living environment, such as higher quality public schools, a commute time cut in half, and walking distance to shops or work. **Figure 3.17** shows that 21 percent of households indicated they would be very likely to pay 10 percent more on housing to cut commute time in half, and nearly half said they would be somewhat likely.¹⁴

Figure 3.17
Willingness to Pay 10% More to Cut Commute Time

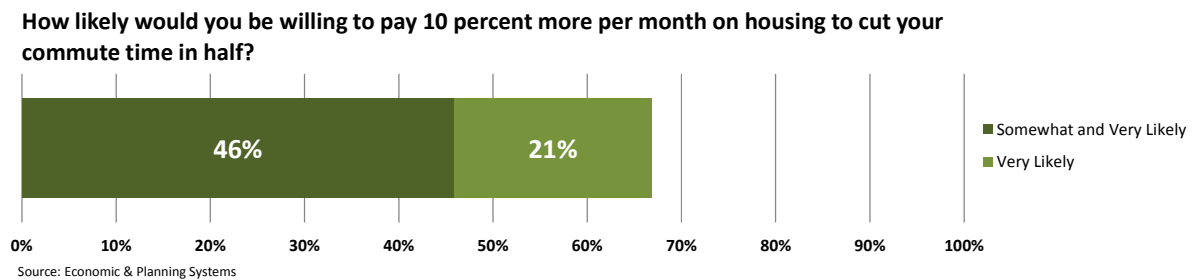
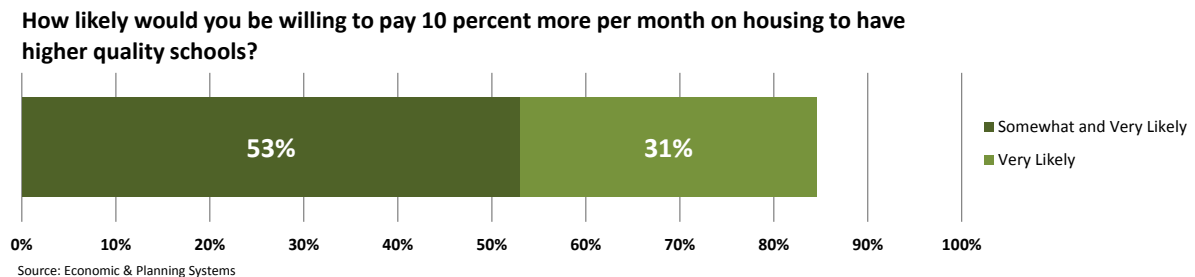


Figure 3.18 shows that, among other choices, households seem most willing to pay a premium for their housing to achieve higher quality public schools. Thirty-one percent say they are very likely to pay a premium, with the younger age cohorts responding more positively.¹⁵

Figure 3.18
Willingness to Pay 10% More for Higher Quality Schools



¹⁴ The breakdown by age illustrates that younger ages are very likely to pay a premium to achieve a short commute to work, though it should be noted that these age cohorts are generally spending less at the moment on housing payments or rents than older age cohorts. See **Appendix A, Figure A4** for more detail.

¹⁵ See **Appendix A, Figure A5** for more detail.

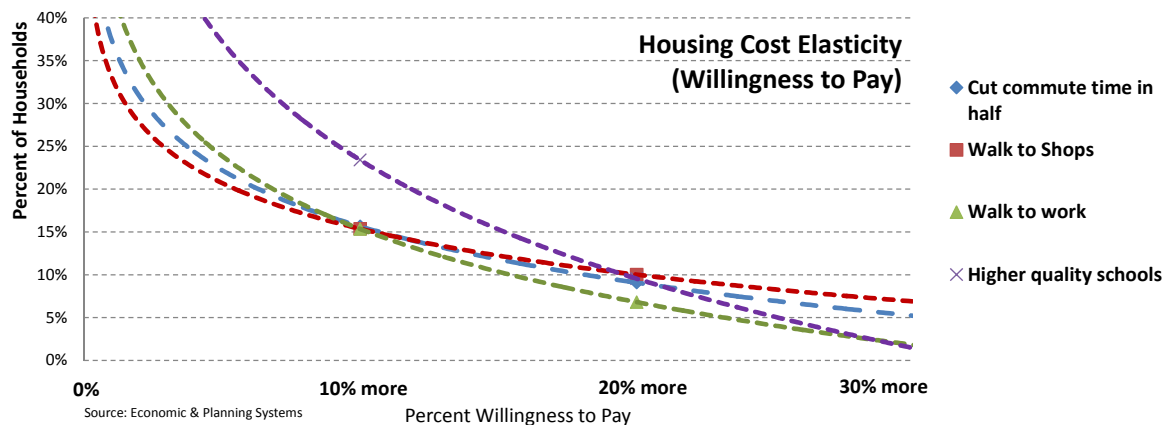
To test their willingness to pay and a component of elasticity of demand¹⁶, households were asked whether they would be willing to pay 20 percent more for any of these benefits. Overall, 10 percent of households indicated their willingness to pay an additional 20 percent to have higher quality schools, cut commute time in half, and to be able to walk to shops, restaurants, and entertainment.

Figure 3.19 illustrates how much more households are willing to pay in housing for four neighborhood and community characteristics. Among the four characteristics, nearly 25 percent of households or 1 in 4 households are willing to pay 10 percent more for housing to have higher quality schools, and approximately 10 percent of households are willing to pay 20 percent more.¹⁷

While the ability to walk to shops, walk to work, or cut commute time in half doesn't have as strong an appeal as higher quality schools, approximately 15 percent of all households are willing to pay 10 percent more on housing for these characteristics, and between 5 and 10 percent will pay a 20 percent premium.

In general, the data shown can be interpreted as a representation of the potential market share of households interested and willing to pay for these attributes.

Figure 3.19
Very Likely to Pay 20 Percent More



Trade-Offs

Overall, trade-offs will play an increasingly prominent role in the purchase of a house. Households balance what they want and can afford in a house and neighborhood. But trade-offs beyond size of house versus neighborhood are playing a larger role in their decision-making.

¹⁶ Elasticity (or price elasticity) of demand refers to the rigidity of a consumer's response to increasing prices for a good or service. Goods that are inelastic describe a consumer-production relationship where as prices increase, demand remains the same. Goods that are elastic describe a relationship where as prices increase, demand for a good decreases.

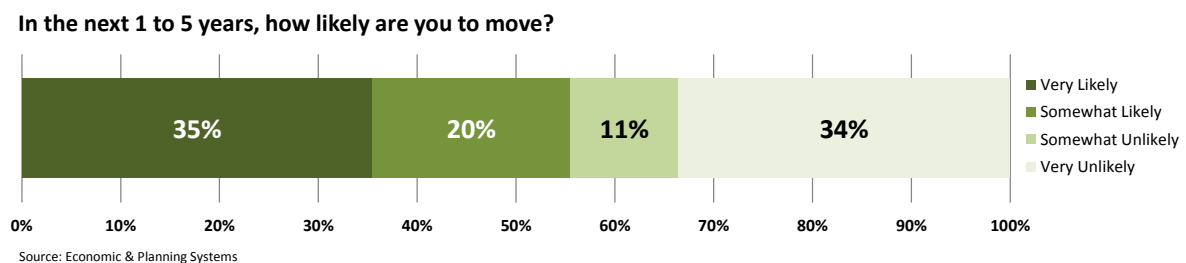
¹⁷ It is important to note here that these results reflect households who indicated they were "very likely" to pay a premium on housing, and does not include those who indicated they were "somewhat likely". That is, these results do not indicate that, for example, 90 percent of households are not willing to pay 20 percent more to have higher quality schools.

Projection of Existing Conditions

The preferences, willingness to make trade-offs, willingness to pay, and characteristics of housing demand described in this chapter identify various elements of the city's housing demand. The flip side (supply), however, is that many of the neighborhoods need reinvestment to achieve the qualities desired by households. As the household preferences make clear, these and other housing, neighborhood, and community attributes are very important to households, and they are not meeting needs.

Figure 3.20 shows how likely households are to move in the next 1 to 5 years. The results are broken down by age category to illustrate the magnitude of difference in likelihoods between the younger and older age cohorts. While overall approximately one third of households say they are very likely to move, among 18 to 24 year-olds, 64 percent of them are very likely to move.¹⁸

Figure 3.20
Likelihood of Moving in Next 1 to 5 Years



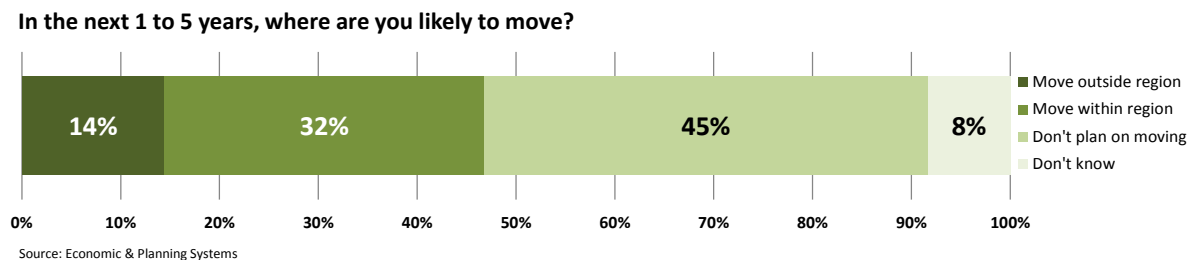
¹⁸ For 25 to 34 year olds, the likeliness remains strong but drops to 47 percent and decreases across the age spectrum to 65 to 74 and 75 and older with approximately 10 percent indicating a strong likeliness to move. See **Appendix A, Table A11** for more detail.

Figure 3.21 illustrates where households plan to move within the next 1 to 5 years, and the magnitude of households. Overall, 14 percent of households intend to move outside the region (defined as the metro area, which includes Edmond, Moore, Norman, and other nearby communities) in the next 1 to 5 years. An additional 32 percent indicated their intent to move somewhere within the metro area (either within the city or within the metro area), but nearly half indicated they do not intend to move and another 8 percent indicated ambivalence.

The survey also asked households what their plans were beyond this short-term horizon.¹⁹ Naturally, households indicate with increasing uncertainty what their plans are for the future. That is, nearly 30 percent of households indicate they don't know what they will be doing in 5 to 10 years, and that proportion increases to 44 percent for the 10 to 20-year period.

In general, the study recognizes that in- and out-migration is a natural occurrence. Those households leaving the region will be replaced with new households moving into the region. Of greatest interest, however, are the households moving within the region. The long-term regional trends suggest an incremental out-migration that if left to its own momentum, will continue to deplete the city of households and thus resources. Therefore, repositioning and reinvesting in specific neighborhoods and Subareas is a particular focus of the study.

Figure 3.21
Where Households are Likely to Move



¹⁹ See **Appendix A, Table A9** and **Table A10** for details.

General Community Sentiments

The community survey reveals a tension between the interests and preferences of the city's older and younger populations. Older generations' generally prefer larger lots, lower density, and greater privacy than younger generations. The younger, more urban-minded generations have traveled, gone to school, or at one point lived in bigger cities like New York, Chicago, or San Francisco, cities which were specifically mentioned in open-ended comments. Consequently, they are importing their housing, neighborhood, and community preferences to Oklahoma City. In the process of identifying scale, magnitude, and type of redevelopment, it will be important for the City to consider the various preferences of its current and future population.

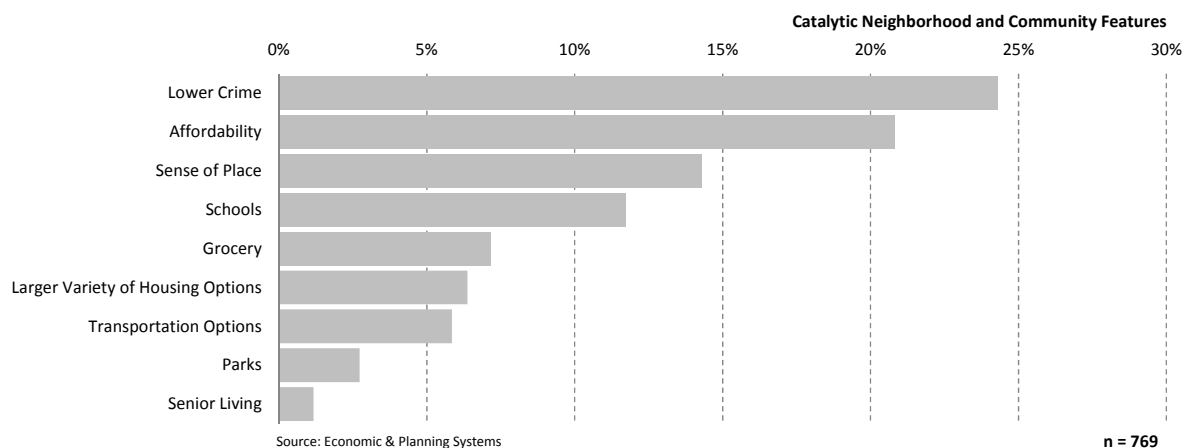
Urban Redevelopment

This study is not specifically about housing for urban or central locations, although households hold very strong feelings about why they would or would not want to live in such locations.

Figure 3.22 is a summary of response to answer the open-ended question "What would it take for you to move to a more central location within Oklahoma City?"

Reflective of the fact that sense of safety and security is the number one concern of households, lower crime is stated by nearly 25 percent of the respondents for what would get them to a more central location. Following that are affordability, sense of place, schools, a grocery store, larger variety of housing options, transportation options, parks, and the prevalence of senior living options.

Figure 3.22
What Will it Take to Move to a More Central Location?



Other factors based on the open-ended responses are provided below. The survey provided opportunities to gauge the community's sentiments regarding several aspects of redevelopment they consider essential. The following is a list of redevelopment features that were most commonly cited by households.

- **Urban Form.** For as many open-ended comments about wanting Oklahoma City to model its redevelopment after the urban forms of larger cities, there are just as many who say they want it to be less like those places.
- **Grocery Stores.** Having a grocery store in more central locations was cited specifically 55 times in the open-ended comments, or 7 percent of all open-ended responses.
- **Schools.** People in the City are somewhat of two minds about their schools – some staunchly stand behind the quality of some central schools, but 90 respondents indicated they wanted better schools in the central parts of town on par with Yukon, Edmond, Mustang, etc., especially for levels beyond elementary school.
- **Safety and Security.** As it was mentioned 187 times, or by 24 percent of those who wrote open-ended responses, perception of safety and security play heavily into people's considerations. For them, crime is a deterrent to moving to a more central location.
- **Better and More Transit Options.** More accessibility through options other than the car – better transportation options, more frequent bus service, rail.
- **Green Spaces and Resource Conservation Mindedness.** Parks, access to bike paths and trails, proximity to nature but still in an urban environment.
- **Sense of Community.** Households desire a sense of place, sense of community, including investing in existing housing stock.
- **Affordability.** In the last decade, affordability concerns have been elevated as a result of two major recessions heightened awareness of and sensitivity to price do not seem to be abating even as the economy remained relatively strong in Oklahoma City.

4. FORECAST

Trends and stated preferences point toward a continuing migration of households out of the city and a continuation of conventional lower-density housing development at the city's extremities. One alternative to this scenario, however, could capitalize on the city's assets such as improvements to infrastructure, services, etc. through investment in projects and programs and mitigate this pattern.

This chapter presents a demand scenario by Subarea and unit type under the condition that the city invests and pursues projects and programs to stimulate activity and demand interest in particular Subareas.

Major Assumptions

The underlying forecasts of population by age were originally prepared by the City at the Census Tract level. They have been aggregated to the city level by age group to allow for this independent projection of housing demand by Subarea.

As detailed in Appendix C, the forecast methodology includes three critical assumptions. One of them incorporates the profiles of values and preferences identified in the survey findings. The other rests on the city's success at achieving various neighborhood and community-level infrastructure and service improvements within the next ten years or less. The last piece assumes that housing vacancy rates do not change substantially from their existing levels. In summary, these assumptions are:

- Housing demand is created and directly affected by what households value in housing types, neighborhoods, and their community, proximities to retail, restaurants, and entertainment, for example;
- If the City can successfully implement improvement projects and programs that positively change households' perceptions of each Subarea's attractiveness, a greater portion of growth can be captured within the existing city boundaries especially within the well-established urban Subareas, slowing the expansion of housing development into its suburban and rural extremities; and
- Housing vacancy levels remain fairly constant during the forecast period. That is, when units are vacated in a particular Subarea, the forecast assumes that those units are re-occupied up to the current vacancy rate, which is assumed to be equilibrium.²⁰

Project and Program Investment

This forecast assumes that the City makes strategic investment in infrastructure projects and programs that increase the relative attractiveness of each Subarea. For example, the City

²⁰ In some cases, Subareas with high unit turnover (4, 5, 6, and 10) may leave a large volume of specific unit types available. Initial demand may not be sufficient to re-occupy these units. One possible outcome, which this methodology assumes, is that the market supports a reduction in their sales prices because buyers prefer a different type of house or a house in a different Subarea. This behavior reflects the notion that survey respondents identified their first, second, and third choice for preferred location of residence, and that households make trade-offs if their first or even second choices are unavailable.

already makes use of MAPS funding and General Obligation Bonds to fund infrastructure and community-wide projects. It is assumed that these funding mechanisms will be available in the future and would be allocated for improvements throughout the city. As investments are made that respond to what households in the city deem important, increased satisfaction may translate to increased housing demand.²¹

Housing Forecast

The forecasts below are grounded in preference and satisfaction data collected through the survey. The data are further categorized by age cohort to make distinctions between age cohorts in the future that will desire certain types of housing in certain areas. A full description of the methodology can be found in **Appendix C**.

Total Housing Demand

Total housing demand includes households moving within the city as well as net new households, defined as new household formation or the in-migration of households. As shown below, new housing is projected to account for approximately 50 percent of total housing demand while units that turnover are estimated to satisfy demand for the remaining 50 percent.

2010-2020

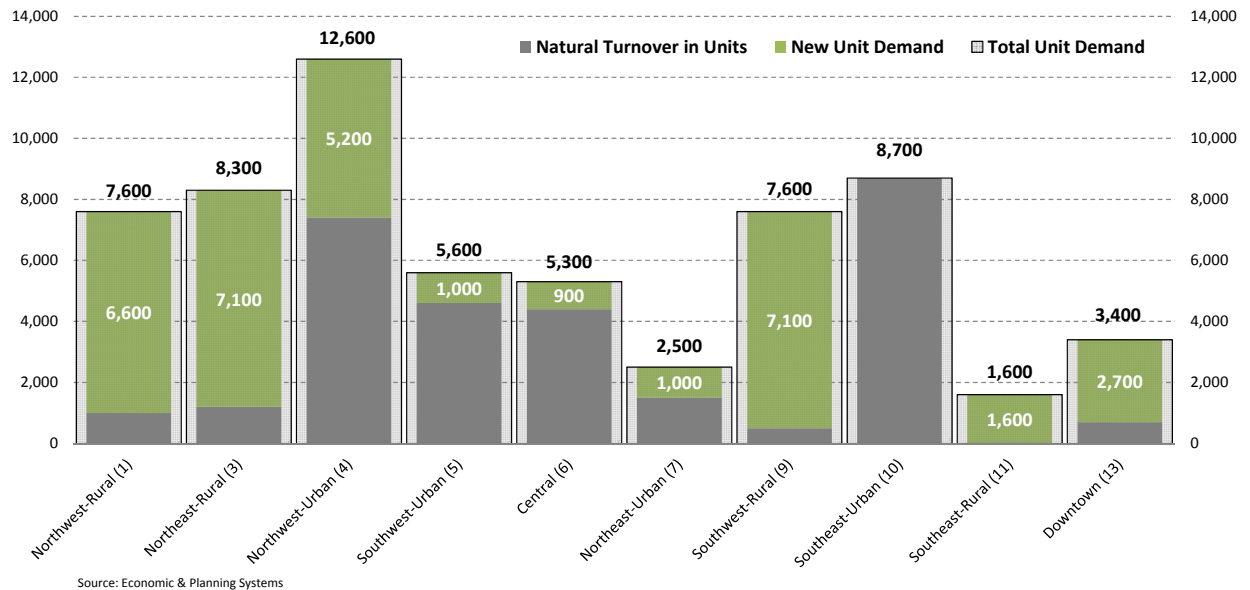
Between 2010 and 2020, total housing demand is estimated at approximately 63,200, as illustrated. **Figure 4.1** shows the total demand for each Subarea with its two main components: existing supply meeting demand, and (in green) the need for net new housing construction to meet demand. Of this, approximately 30,000 units are projected to turn over, and 33,200 reflect new housing construction.

Unit turnover in the City is estimated to be approximately 10 percent of the inventory between 2010 and 2020 and approximately 10 percent of the inventory between 2020 and 2030. Between 2010 and 2020, however, unit turnover is lowest in the Northeast-Urban (7) area at 11 percent and highest in Central (6) at 17 percent. But for the following decade, after infrastructure investments are made, turnover is lowest in Southeast-Rural (11) at 7 percent and highest in Northwest-Rural (1) at 38 percent, due to its low base number of units.

Between 2010 and 2020, Southeast-Rural (11), for example, 100 percent of growth is anticipated to be through new construction. In other rural areas, where development pressure is high, demand for new units accounts for large majorities of total housing demand as well. In Southwest-Rural (9), new construction is projected to account for 93 percent of total housing demand; in Northwest-Rural (1), 87 percent; and in Northeast-Rural (3), 86 percent. In Downtown (13), nearly 80 percent of estimated demand will need to be met through new development. In the Northwest-Urban (4) and Northeast-Urban (7), new construction is estimated to account for approximately 40 percent, reflecting in part higher turnover. The Southwest-Urban (5), and Central (6), net new housing demand is less than 20 percent of total demand, the remainder of which is met by housing turnover.

²¹ **Appendix C**, "Sensitivity Analysis by Subarea", illustrates how various infrastructure and asset investments change the overall levels of housing demand.

Figure 4.1
Total Demand, 2010-2020



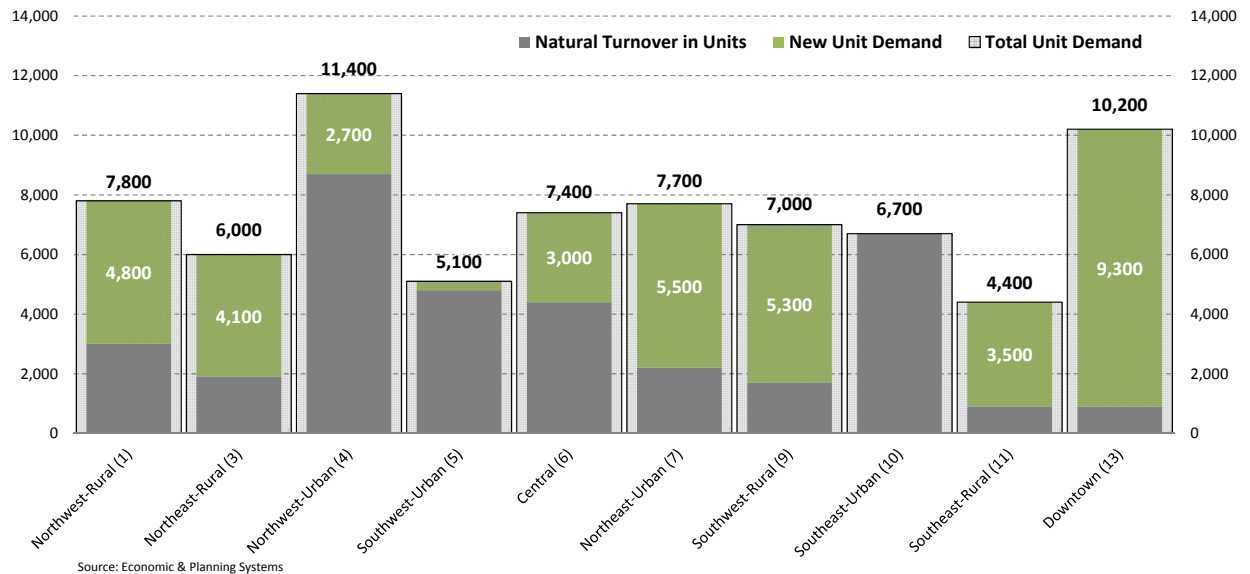
2020-2030

The forecast of demand for this time period is similar to that of the preference/satisfaction methodology for the 2010-2020 horizon. The methodology for this period, however, incorporates decisions made iteratively with the City about where and to what extent project and program investment would be made to maximize demand for each Subarea. As mentioned previously, a detailed explanation of this methodology can be found in **Appendix C** and a detailed description of the sensitivity analysis results can be found in **Appendix D**.

Figure 4.2 illustrates total housing demand between 2020 and 2030 of approximately 73,700. Of this, approximately 35,200 units are projected to turn over, leaving a demand for new construction of 38,500.

The magnitude of demand by Subarea changes as a result of assumed city project and program improvements and investments. As housing unit turnover increases in rural areas, e.g. Subareas 1, 3, and 11, the portions of new units anticipated to meet demand decrease. Between 2020 and 2030, it is estimated that the City would need more than 9,000 new units in the Downtown (13) area to meet demand. At this point, Downtown will begin reaching its build out capacity, and it is also anticipated that any spillover could occur in the surrounding Subareas, particularly the Southeast-Urban (10). As for the Central (6) area, the demand estimated exceeds estimated development capacity, triggering the potential for redevelopment of areas, upzoning, or a combination of measures.

Figure 4.2
Total Demand, 2020-2030



Housing Demand by Type

Table 4.1 shows housing demand forecasts for the 2010 to 2020 period and the 2020 to 2030 period. The table shows the total inventory in 2010 plus new unit demand for 2010 to 2020, the resulting inventory for 2020, new unit demand for 2020 to 2030, and finally the total estimated inventory in 2030. They are estimated in ranges of minimum to maximum new units, and they are broken down by aggregated housing product types. The current housing product type distribution is also shown for comparison against the distribution of forecasted housing types.²²

- **Traditional single-family** – While 70 percent of the existing inventory is traditional single-family housing, it is estimated that between 2010 and 2020 approximately 44 percent will fall into this category and 38 percent in the following decade.
- **Small lot single-family** – Small lot single-family housing is becoming more common and is estimated to account for 26 percent of new housing versus the existing 2 percent.
- **Apartment/condominium/loft** – Including for-sale and rental housing product, this type of multi-family housing is estimated to account for 20 percent of the new housing built between 2010 and 2020. In the following decade, it is estimated to account for 24 percent versus the existing 21 percent.
- **Duplexes** – Duplexes and triplexes are estimated to account for approximately 2 percent of new housing demand between 2010 and 2030.
- **Townhomes** – While townhomes account for one percent of the existing inventory, they are estimated to account for 4 percent of the new housing built between 2010 and 2020 and 8 percent between 2020 and 2030.

²² Note that the portions shown in the “new” columns should be understood as just the increase in units of that type, not necessarily a profile of what the overall inventory should look like.

Table 4.1
Housing Type Demand, 2010-2030

	2010		2010-2020		2020		2020-2030		2030	
	Inventory	as %	New	as %	Inventory	as %	New	as %	Inventory	as %
Minimum										
Single-Family	201,592	69%	14,640	44%	216,232	67%	14,410	37%	230,642	63%
Small Lot Single-Family	6,000	2%	8,730	26%	14,730	5%	9,880	26%	24,610	7%
Apartment / Condo / Loft	61,471	21%	6,800	20%	68,271	21%	9,060	24%	77,331	21%
Duplex / Triplex	12,445	4%	650	2%	13,095	4%	720	2%	13,815	4%
Townhome	1,461	1%	1,410	4%	2,871	1%	3,020	8%	5,891	2%
<u>Other</u>	<u>8,622</u>	<u>3%</u>	<u>1,020</u>	<u>3%</u>	<u>9,642</u>	<u>3%</u>	<u>1,380</u>	<u>4%</u>	<u>11,022</u>	<u>3%</u>
Total	291,591	100%	33,250	100%	324,841	100%	38,470	100%	363,311	100%
Maximum										
Single-Family	201,592	69%	15,730	44%	217,322	66%	15,900	37%	233,222	63%
Small Lot Single-Family	6,000	2%	9,400	26%	15,400	5%	11,060	26%	26,460	7%
Apartment / Condo / Loft	61,471	21%	7,310	20%	68,781	21%	10,070	24%	78,851	21%
Duplex / Triplex	12,445	4%	690	2%	13,135	4%	820	2%	13,955	4%
Townhome	1,461	1%	1,480	4%	2,941	1%	3,340	8%	6,281	2%
<u>Other</u>	<u>8,622</u>	<u>3%</u>	<u>1,100</u>	<u>3%</u>	<u>9,722</u>	<u>3%</u>	<u>1,520</u>	<u>4%</u>	<u>11,242</u>	<u>3%</u>
Total	291,591	100%	35,710	100%	327,301	100%	42,710	100%	370,011	100%

Source: Economic & Planning Systems
H:\2866-Oklahoma City OK Housing Plan\Corres\Housing Forecasts by Area - Sept 13 2013.xlsx\NEW Citywide Summary

Demand by Location

Estimates of demand are calculated for each Subarea, as well as by product type. The dispersion of units by Subareas reflects the magnitude of demand for each Subarea during each time period. The dispersion of housing unit types, moreover, reflects the magnitude of demand for specific product types in specific Subareas.

Based on data from the survey comparing desired home, neighborhood, and community characteristics with the presence and satisfaction in these characteristics throughout each Subarea, the results show that between 2010 and 2020, nearly 80 percent of all new unit housing demand occurs in areas 1, 3, 4, and 9 – all the suburban and rural locations of the City except 11 (**Table 4.2**). Approximately 86 percent of all demand for traditional single-family units occurs in these areas as well. Downtown is projected to capture 8 percent of total new housing demand, but 18 percent of the demand for new apartment, condominium, or loft development. Downtown is also anticipated to capture 14 percent of the new duplex and townhome market.

Between 2020 and 2030, however, demand is more evenly distributed among the Subareas, reflecting, in particular, the targeted infrastructure investments in areas 6, 7, and 13 (**Table 4.3**). During this time, volume of demand in Subarea 6 is estimated to more than double the demand volume of 2010 to 2020; Subarea 7 is estimated to quadruple over the demand of 2010 to 2020; and Downtown's level of demand is estimated to triple.

Product type capture in this second decade is also reflective of a more centralized demand focus. Because these Subareas show the greatest market responsiveness to project and program investment, during this time, Subareas 6 and 7 are estimated to capture more than 20 percent of all new housing demand. They are also projected to capture 25 percent of traditional single-family housing demand and 28 percent of the small lot single-family demand. Downtown is projected to capture a total of 24 percent of the City's housing demand, but 46 percent of all new apartment, condominium, and loft development, as well as 35 percent of new duplex and townhome demand.

Table 4.2
Housing Type Demand by Subarea, 2010-2020

	Oklahoma City Region									
	Northwest- Rural (1)	Northeast- Rural (3)	Northwest- Urban (4)	Southwest- Urban (5)	Central (6)	Northeast- Urban (7)	Southwest- Rural (9)	Southeast- Rural (11)	Downtown (13)	Total Region
Minimum										
Single-Family	3,210	3,450	2,180	330	290	530	3,600	620	430	14,640
Small Lot Single-Family	1,460	1,910	1,720	370	380	280	1,560	440	610	8,730
Apartment / Condo / Loft	1,450	1,220	1,000	210	170	140	1,040	390	1,180	6,800
Duplex / Triplex	80	90	80	40	10	10	290	20	30	650
Townhome	250	270	170	40	40	40	290	60	250	1,410
<u>Other</u>	<u>160</u>	<u>170</u>	<u>50</u>	<u>20</u>	<u>10</u>	<u>10</u>	<u>330</u>	<u>70</u>	<u>200</u>	<u>1,020</u>
Total	6,610	7,110	5,200	1,010	900	1,010	7,110	1,600	2,700	33,250
Maximum										
Single-Family	3,450	3,690	2,350	360	330	580	3,850	660	460	15,730
Small Lot Single-Family	1,570	2,050	1,850	410	420	310	1,660	470	660	9,400
Apartment / Condo / Loft	1,550	1,300	1,080	230	190	160	1,120	410	1,270	7,310
Duplex / Triplex	90	90	90	40	10	10	310	20	30	690
Townhome	270	280	180	40	40	40	310	60	260	1,480
<u>Other</u>	<u>170</u>	<u>190</u>	<u>50</u>	<u>20</u>	<u>10</u>	<u>10</u>	<u>350</u>	<u>80</u>	<u>220</u>	<u>1,100</u>
Total	7,100	7,600	5,600	1,100	1,000	1,110	7,600	1,700	2,900	35,710
As % of Totals										
Minimum										
Single-Family	49%	49%	42%	33%	32%	52%	51%	39%	16%	44%
Small Lot Single-Family	22%	27%	33%	37%	42%	28%	22%	28%	23%	26%
Apartment / Condo / Loft	22%	17%	19%	21%	19%	14%	15%	24%	44%	20%
Duplex / Triplex	1%	1%	2%	4%	1%	1%	4%	1%	1%	2%
Townhome	4%	4%	3%	4%	4%	4%	4%	4%	9%	4%
<u>Other</u>	<u>2%</u>	<u>2%</u>	<u>1%</u>	<u>2%</u>	<u>1%</u>	<u>1%</u>	<u>5%</u>	<u>4%</u>	<u>7%</u>	<u>3%</u>
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Maximum										
Single-Family	49%	49%	42%	33%	33%	52%	51%	39%	16%	44%
Small Lot Single-Family	22%	27%	33%	37%	42%	28%	22%	28%	23%	26%
Apartment / Condo / Loft	22%	17%	19%	21%	19%	14%	15%	24%	44%	20%
Duplex / Triplex	1%	1%	2%	4%	1%	1%	4%	1%	1%	2%
Townhome	4%	4%	3%	4%	4%	4%	4%	4%	9%	4%
<u>Other</u>	<u>2%</u>	<u>3%</u>	<u>1%</u>	<u>2%</u>	<u>1%</u>	<u>1%</u>	<u>5%</u>	<u>5%</u>	<u>8%</u>	<u>3%</u>
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Economic & Planning Systems

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Table 4.3
Housing Type Demand by Subarea, 2020-2030

	Oklahoma City Region									Total Region
	Northwest- Rural (1)	Northeast- Rural (3)	Northwest- Urban (4)	Southwest- Urban (5)	Central (6)	Northeast- Urban (7)	Southwest- Rural (9)	Southeast- Rural (11)	Downtown (13)	
Minimum										
Single-Family	2,250	1,930	1,100	90	930	2,780	2,700	1,330	1,300	14,410
Small Lot Single-Family	1,030	1,070	870	110	1,240	1,500	1,080	950	2,030	9,880
Apartment / Condo / Loft	1,020	670	500	60	550	730	720	820	3,990	9,060
Duplex / Triplex	70	60	50	10	40	80	230	50	130	720
Townhome	320	280	160	20	210	370	320	190	1,150	3,020
<u>Other</u>	<u>110</u>	<u>100</u>	<u>20</u>	<u>10</u>	<u>20</u>	<u>30</u>	<u>240</u>	<u>160</u>	<u>690</u>	<u>1,380</u>
Total	4,800	4,110	2,700	300	2,990	5,490	5,290	3,500	9,290	38,470
Maximum										
Single-Family	2,440	2,070	1,340	250	1,060	2,980	2,910	1,410	1,440	15,900
Small Lot Single-Family	1,120	1,150	1,070	290	1,410	1,610	1,160	1,000	2,250	11,060
Apartment / Condo / Loft	1,100	720	610	160	620	790	780	870	4,420	10,070
Duplex / Triplex	80	60	60	30	50	90	250	50	150	820
Townhome	350	300	190	50	240	400	340	200	1,270	3,340
<u>Other</u>	<u>120</u>	<u>100</u>	<u>30</u>	<u>20</u>	<u>20</u>	<u>40</u>	<u>260</u>	<u>170</u>	<u>760</u>	<u>1,520</u>
Total	5,210	4,400	3,300	800	3,400	5,910	5,700	3,700	10,290	42,710
As % of Totals										
Minimum										
Single-Family	47%	47%	41%	30%	31%	51%	51%	38%	14%	37%
Small Lot Single-Family	21%	26%	32%	37%	41%	27%	20%	27%	22%	26%
Apartment / Condo / Loft	21%	16%	19%	20%	18%	13%	14%	23%	43%	24%
Duplex / Triplex	1%	1%	2%	3%	1%	1%	4%	1%	1%	2%
Townhome	7%	7%	6%	7%	7%	7%	6%	5%	12%	8%
<u>Other</u>	<u>2%</u>	<u>2%</u>	<u>1%</u>	<u>3%</u>	<u>1%</u>	<u>1%</u>	<u>5%</u>	<u>5%</u>	<u>7%</u>	<u>4%</u>
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Maximum										
Single-Family	47%	47%	41%	31%	31%	50%	51%	38%	14%	37%
Small Lot Single-Family	21%	26%	32%	36%	41%	27%	20%	27%	22%	26%
Apartment / Condo / Loft	21%	16%	18%	20%	18%	13%	14%	24%	43%	24%
Duplex / Triplex	2%	1%	2%	4%	1%	2%	4%	1%	1%	2%
Townhome	7%	7%	6%	6%	7%	7%	6%	5%	12%	8%
<u>Other</u>	<u>2%</u>	<u>2%</u>	<u>1%</u>	<u>3%</u>	<u>1%</u>	<u>1%</u>	<u>5%</u>	<u>5%</u>	<u>7%</u>	<u>4%</u>
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Economic & Planning Systems

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5. AREAS OF DEVELOPMENT

Absorbing future housing demand can be met through a combination of sites for re/development, as well as upzoning or overlays. In the more central parts of the city, strategic use of infill parcels in combination with upzoning may be ideal. This chapter outlines a selection of the Subareas and neighborhoods or corridors within each that are positioned best for these opportunities.

Areas of Transformation

In the community survey, households quantified how important the 14 different housing, neighborhood, and community characteristics were and how well each Subarea scored. A sensitivity analysis of each Subarea was conducted to determine whether improving satisfaction in any of the 14 characteristics would increase or decrease its relative desirability. It also determined whether each Subarea had high or low sensitivity to projects or programs that increased overall satisfaction levels.

While it is true that capital improvements and investment have a positive effect on demand for a Subarea, this graphic depicts the cumulative results or redistribution of housing demand after all Subareas are the recipients of some degree of capital improvement or investment.

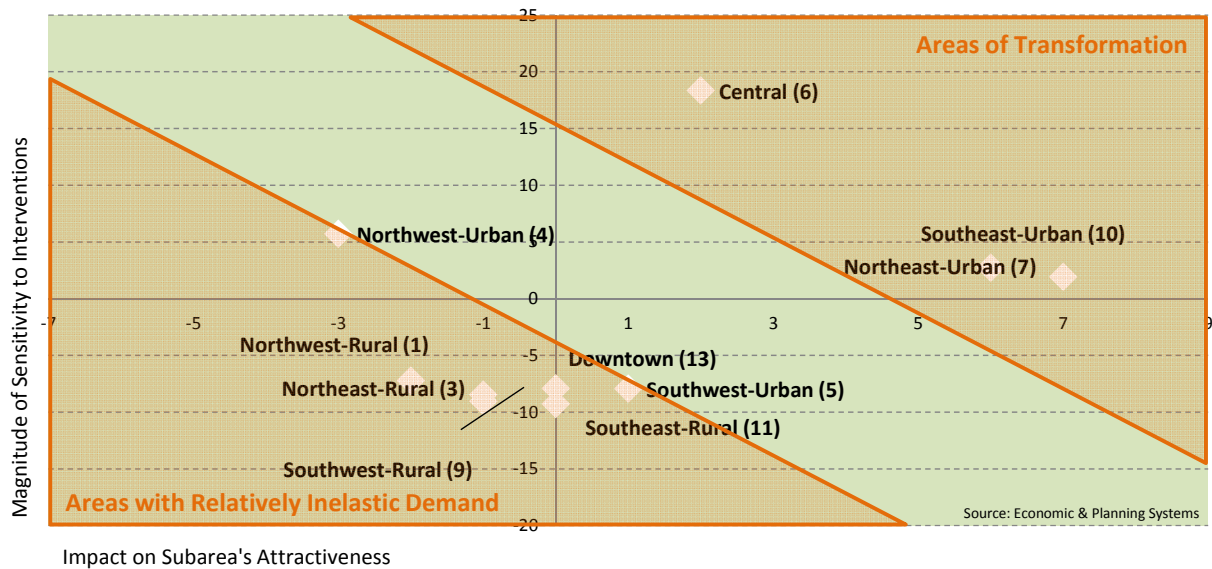
- **The horizontal axis** in **Figure 5.1** depicts the degree of impact investment has on the desirability of each Subarea. That is, it reflects the magnitude of the net change in housing demand. The Subareas to the left of the axis have relatively negative impacts, defined by a reduction in the Subarea's net housing demand. That is, Subareas with "negative impact" do not mean that the investment is not beneficial at all; rather it means that the effect of capital improvements or investments in other Subareas had a greater positive impact.

As indicated in the findings of the Executive Summary, for example, improving the school quality of all Subareas throughout the city had the net impact of increasing demand for central parts of the city—Subareas 6, 7, and 13, for example. The reason being that those more established neighborhoods possessed other important neighborhood characteristics, amenities, and proximities that became households' deciding factor when school quality was made or assumed to be equal. In a similar fashion, household demand is estimated to redistribute to some of these same more established neighborhoods when strategic investment and capital improvements are made.

- **The vertical axis** depicts the sensitivity of each Subarea to projects or programs. Those toward the bottom of the graphic have relatively lower sensitivity and those toward the top have higher sensitivity to investment. The result indicates that projects and programs in Subareas 6, 7, and 10 have positive and greater impacts on their desirability than Subareas 1, 3, 9, and 11.

In general, the purpose of this illustration is to provide some guidance and an estimation of the extent of impact that coordinated and strategic investment might have on housing demand in each Subarea.

Figure 5.1
Areas of Transformation



There are areas throughout the city where development and redevelopment are possible. Parcel ownership, entitlements, infrastructure, and other site readiness issues limit, however, the scope of focus on areas for this part of the study. Moreover, these conditions suggest market timing for some Subareas and corridors that are more mid-term or long-term in nature. The areas identified in this section are not a comprehensive selection of potential areas for redevelopment. They include suburban and urban Subareas in which redevelopment has the potential to shape or reshape the built environment.

Northwest Urban (4)

This Subarea is not specifically called out as an area of transformation, but one of its under-developed corridors is potentially positioned to capture a considerable amount of the demand, given appropriate market timing and opportunity.

Britton Town (Western Avenue and Britton Road)

This area represents a potential redevelopment opportunity over the next 10 to 20 years. It is characterized by low-intensity uses, such as a pub, dress shop, an abandoned theater, a bank, several tax preparation uses, hair salon, a Family Dollar, and many vacated storefronts. In planning for the longer-term, the City could evaluate this area for market support, redevelopment potential, ownership structures, and proximities to amenities.

Table 5.1 shows there are already approximately 95,000 housing units in this Subarea, and by 2020, this total is anticipated to reach approximately 100,000. Between 2020 and 2030, this area is estimated to capture approximately 10 percent of projected demand for new units, and with strategic investment, this corridor could be a viable opportunity to capture that demand.

Table 5.1
Northwest-Urban

	2010		2010-2020				2020-2030			
	Units	%	New Units	Subarea Dist. (%)	Total Units (2020)	Subarea Dist. (%)	New Units	Subarea Dist. (%)	Total Units (2030)	
Minimum										
Single-Family	61,068	64%	2,180	42%	63,248	63%	1,100	41%	64,348	62%
Small Lot Single-Family	1,587	2%	1,720	33%	3,307	3%	870	32%	4,177	4%
Apartment / Condo / Loft	27,912	29%	1,000	19%	28,912	29%	500	19%	29,412	28%
Duplex / Triplex	3,987	4%	80	2%	4,067	4%	50	2%	4,117	4%
Townhome	1,209	1%	170	3%	1,379	1%	160	6%	1,539	1%
<u>Other</u>	<u>75</u>	<u>0%</u>	<u>50</u>	<u>1%</u>	<u>125</u>	<u>0%</u>	<u>20</u>	<u>1%</u>	<u>145</u>	<u>0%</u>
Total	95,838	100%	5,200	100%	101,038	100%	2,700	100%	103,738	100%
Maximum										
Single-Family	61,068	64%	2,350	42%	63,418	63%	1,340	41%	64,758	62%
Small Lot Single-Family	1,587	2%	1,850	33%	3,437	3%	1,070	32%	4,507	4%
Apartment / Condo / Loft	27,912	29%	1,080	19%	28,992	29%	610	18%	29,602	28%
Duplex / Triplex	3,987	4%	90	2%	4,077	4%	60	2%	4,137	4%
Townhome	1,209	1%	180	3%	1,389	1%	190	6%	1,579	2%
<u>Other</u>	<u>75</u>	<u>0%</u>	<u>50</u>	<u>1%</u>	<u>125</u>	<u>0%</u>	<u>30</u>	<u>1%</u>	<u>155</u>	<u>0%</u>
Total	95,838	100%	5,600	100%	101,438	100%	3,300	100%	104,738	100%

Source: Economic & Planning Systems

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Central (6)

This Subarea is potentially one of the City's prime areas for transformation. Situated centrally within the City's boundaries, it has some of the oldest housing stock and has a good balance of urban activity centers where residential and non-residential land uses are well-integrated. Its infrastructure is already mostly walkable, and it contains several areas of redevelopment potential that already have the attention of the City.

The Paseo Arts District

There is a strong historical backbone to this corridor. It was built in Spanish revival architecture in 1929 as the first commercial shopping district north of downtown OKC. This area represents a strong candidate for near- to mid-term redevelopment, particularly up-zoning. The area is largely underutilized in housing density for the scale and attractiveness of the retail along Paseo Street. It doesn't present large contiguous sites for redevelopment, but there are several infill sites where multi-story residential development could be appropriate.

This area can also be potentially better connected to the Uptown 23rd Street corridor just to the south and to Oklahoma City University to the west. Such pedestrian connectivity would strengthen and facilitate demand that is needed to graduate this area into higher-density residential uses, particularly close to Paseo Street itself.

The area also has the involvement of local neighborhood organizations, such as Positively Paseo, a nonprofit community redevelopment corporation that targets low- to moderate-income families.

16th Street Plaza District

The Plaza District is a neighborhood commercial district on NW 16th between Classen and Penn Avenue. The area currently houses art galleries, studios, retail, and restaurants, as well as the renovated Plaza Theatre. Within a few blocks radius of this area, there are opportunities to increase residential density and establish or strengthen connections to nearby areas as well. The Plaza District can also serve as an example for areas that are not far along in the redevelopment process, such as Britton Town.

Classen Ten Penn

Located directly south of the 16th Street Plaza District, this area has both near- or mid-term redevelopment potentials, given the demand pressure for this part of the city. This area is also a Strong Neighborhoods Initiative area for the city.

Table 5.2 shows there are approximately 24,000 housing units in this Subarea, and by 2020, this total is anticipated to reach 25,000. Between 2020 and 2030, however, the project and program investments are estimated to influence demand for this Subarea to a greater extent, generating demand for an additional 3,000 to 3,400 more units.

Table 5.2
Central

	2010		2010-2020				2020-2030			
	Units	%	New Units	Subarea Dist. (%)	Total Units (2020)	Subarea Dist. (%)	New Units	Subarea Dist. (%)	Total Units (2030)	
Minimum										
Single-Family	15,691	66%	290	32%	15,981	65%	930	31%	16,911	61%
Small Lot Single-Family	958	4%	380	42%	1,338	5%	1,240	41%	2,578	9%
Apartment / Condo / Loft	3,865	16%	170	19%	4,035	16%	550	18%	4,585	17%
Duplex / Triplex	3,250	14%	10	1%	3,260	13%	40	1%	3,300	12%
Townhome	6	0%	40	4%	46	0%	210	7%	256	1%
Other	5	0%	10	1%	15	0%	20	1%	35	0%
Total	23,775	100%	900	100%	24,675	100%	2,990	100%	27,665	100%
Maximum										
Single-Family	15,691	66%	330	33%	16,021	65%	1,060	31%	17,081	61%
Small Lot Single-Family	958	4%	420	42%	1,378	6%	1,410	41%	2,788	10%
Apartment / Condo / Loft	3,865	16%	190	19%	4,055	16%	620	18%	4,675	17%
Duplex / Triplex	3,250	14%	10	1%	3,260	13%	50	1%	3,310	12%
Townhome	6	0%	40	4%	46	0%	240	7%	286	1%
Other	5	0%	10	1%	15	0%	20	1%	35	0%
Total	23,775	100%	1,000	100%	24,775	100%	3,400	100%	28,175	100%

Source: Economic & Planning Systems

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Northeast Urban (7)

Directly north and east of Downtown, this Subarea is a good candidate for reinvestment, redevelopment, and revitalization. Given its proximity to the Downtown employment center, the Oklahoma University Health Sciences Center, shops, restaurants, and other amenities of interest, housing demand for this Subarea has the potential to exceed the availability of housing stock.

Table 5.3 shows there are approximately 13,000 housing units in this Subarea, and by 2020, this total is anticipated to reach 14,000. Between 2020 and 2030, however, the project and program investments are estimated to influence demand for this Subarea to a greater extent, generating demand for an additional 5,500 to 5,900 more units.

Table 5.3
Northeast-Urban

	2010		2010-2020				2020-2030			
	Units	%	New Units	Subarea Dist. (%)	Total Units (2020)	Subarea Dist. (%)	New Units	Subarea Dist. (%)	Total Units (2030)	
Minimum										
Single-Family	9,867	73%	530	52%	10,397	72%	2,780	51%	13,177	66%
Small Lot Single-Family	247	2%	280	28%	527	4%	1,500	27%	2,027	10%
Apartment / Condo / Loft	2,341	17%	140	14%	2,481	17%	730	13%	3,211	16%
Duplex / Triplex	865	6%	10	1%	875	6%	80	1%	955	5%
Townhome	10	0%	40	4%	50	0%	370	7%	420	2%
<u>Other</u>	<u>103</u>	<u>1%</u>	<u>10</u>	<u>1%</u>	<u>113</u>	<u>1%</u>	<u>30</u>	<u>1%</u>	<u>143</u>	<u>1%</u>
Total	13,433	100%	1,010	100%	14,443	100%	5,490	100%	19,933	100%
Maximum										
Single-Family	9,867	73%	580	52%	10,447	72%	2,980	50%	13,427	66%
Small Lot Single-Family	247	2%	310	28%	557	4%	1,610	27%	2,167	11%
Apartment / Condo / Loft	2,341	17%	160	14%	2,501	17%	790	13%	3,291	16%
Duplex / Triplex	865	6%	10	1%	875	6%	90	2%	965	5%
Townhome	10	0%	40	4%	50	0%	400	7%	450	2%
<u>Other</u>	<u>103</u>	<u>1%</u>	<u>10</u>	<u>1%</u>	<u>113</u>	<u>1%</u>	<u>40</u>	<u>1%</u>	<u>153</u>	<u>1%</u>
Total	13,433	100%	1,110	100%	14,543	100%	5,910	100%	20,453	100%

Source: Economic & Planning Systems

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Southeast Urban (10)

As the City already recognizes, there are challenges and opportunities in this Subarea. The household survey findings suggest that a nearly equal number of households will move out to the number of households who are projected to move in. It is also anticipated that with its proximity to Downtown and the Core to Shore redevelopment area, this Subarea will also be the beneficiary of spill-over demand from Downtown.

Capitol Hill

A key activity center within this Subarea is Capitol Hill, a diverse mix of residential and non-residential uses with shopping, dining, and entertainment. Its redevelopment potential is as substantial as its backbone infrastructure. More specifically, its proximity and connection to Core to Shore is a key asset of this Subarea on which the City planning efforts should capitalize. Specifically, it serves as an anchor for the area south of the Oklahoma River to Downtown with its strong orientation to both the River and Core to Shore.

Downtown (13)

As the city's employment center and, increasingly, as a center of more residential and retail development, Downtown will continue to be the recipient of increased housing demand as larger numbers of younger households place pressure on the market in the future.

OU Health Science Center

The neighborhood directly south of the health science center is also a potential node for residential redevelopment, given its proximity to the health center campus and downtown. Although several of the larger parcels are under ownership of the health science center, toward NE 4th Street are several Oklahoma City Urban Renewal Authority parcels, some contiguous and some not. The most recently available (2006) Oklahoma Health Center Master Plan Capital Improvements Plan does not identify any of these parcels for redevelopment, but a daycare facility is currently being completed on a site along NE 8th Street. As this area is likely to build out toward the south, the OCURA sites could be good opportunity parcels for redevelopment with a mix of uses, including workforce housing.

Core to Shore

The area is located on the south side of the CBD in Oklahoma City and encompasses 1,375 acres. Interstate 40 splits the Core to Shore area into two sections; each is anticipated to develop differently. Due to the proximity to downtown, the section north of the relocated I-40 will likely develop at urban densities averaging approximately 30 units per acre. The majority of the medium- to high-density housing will occur within this area north of I-40.

Table 5.4 shows there are approximately 2,800 housing units in this Subarea, and by 2020, this total is anticipated to reach 5,500. Between 2020 and 2030, however, the project and program investments are estimated to influence demand for this Subarea to a greater extent, generating demand for an additional 9,300 to 10,300 more units.

Table 5.4
Downtown

	2010		2010-2020				2020-2030			
	Units	%	New Units	Subarea Dist. (%)	Total Units (2020)	Subarea Dist. (%)	New Units	Subarea Dist. (%)	Total Units (2030)	
Minimum										
Single-Family	322	12%	430	16%	752	14%	1,300	14%	2,052	14%
Small Lot Single-Family	81	3%	610	23%	691	13%	2,030	22%	2,721	18%
Apartment / Condo / Loft	2,246	81%	1,180	44%	3,426	63%	3,990	43%	7,416	50%
Duplex / Triplex	83	3%	30	1%	113	2%	130	1%	243	2%
Townhome	35	1%	250	9%	285	5%	1,150	12%	1,435	10%
<u>Other</u>	<u>0</u>	<u>0%</u>	<u>200</u>	<u>7%</u>	<u>200</u>	<u>4%</u>	<u>690</u>	<u>7%</u>	<u>890</u>	<u>6%</u>
Total	2,767	100%	2,700	100%	5,467	100%	9,290	100%	14,757	100%
Maximum										
Single-Family	322	12%	460	16%	782	14%	1,440	14%	2,222	14%
Small Lot Single-Family	81	3%	660	23%	741	13%	2,250	22%	2,991	19%
Apartment / Condo / Loft	2,246	81%	1,270	44%	3,516	62%	4,420	43%	7,936	50%
Duplex / Triplex	83	3%	30	1%	113	2%	150	1%	263	2%
Townhome	35	1%	260	9%	295	5%	1,270	12%	1,565	10%
<u>Other</u>	<u>0</u>	<u>0%</u>	<u>220</u>	<u>8%</u>	<u>220</u>	<u>4%</u>	<u>760</u>	<u>7%</u>	<u>980</u>	<u>6%</u>
Total	2,767	100%	2,900	100%	5,667	100%	10,290	100%	15,957	100%

Source: Economic & Planning Systems
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6. *POLICY RECOMMENDATIONS*

On its current trajectory, the city's future will likely be a blend of positive and negative outcomes. Redevelopment momentum will continue downtown as the City directs resources into its revitalization, but development on the outskirts of the City will also continue. Of greater concern, however, are the older, inner-ring suburbs: Central (6), Northeast-Urban (7), and Southeast-Urban (10). Without investment, these areas will lose households, their vacancy rates will increase, and they will become a greater fiscal burden to the City. The strategies and recommendations outlined here are designed to meet short- and long-term objectives. They are tailored to households' preferences and values, as well as where strategic investment will have the greatest positive economic, social, and fiscal effect.

Economic Goals

The City has been very effective in stewarding its resources and strategically using public funds for infrastructure projects, such as previous MAPS efforts and GO bond-funded programs. Overall, the City should continue to leverage its resources to achieve community-wide objectives.

Funding Sources

The City should evaluate its funding options, including local, state, and federal sources. In general, there is always the risk of over-commitment of these resources. Each should be viewed as a valuable resource in a comprehensive funding strategy for the City to identify and rank in order of revenue-generating potential, utility, and competitiveness. It is recommended that the City approach this task by constructing a matrix of options with ratings of each characteristic and a prioritization of the sources. This matrix would serve as a guiding tool for the City to use internally in its long-term land use planning and strategy efforts.

Existing Sources

In the past, MAPS and General Obligation bonds have been most effective in generating substantial local sources of revenue for strategic projects and programs. In light of this study's findings, the projects that have already been funded through the MAPS capital improvement program are illustrative of the types of reinvestment efforts that should be continued.

Specifically, infrastructure projects on the magnitude of the streetcar underway have the ability to influence residential and non-residential demand, specifically transit-oriented development (TOD) along its alignment. Other projects, such as the Bricktown Canal are unique amenities with desirable and appropriate proximity to residential areas in Bricktown to the north and east. Other downtown projects also have the potential to influence residential and non-residential development, because they contribute to the type of urban activity center that appeals to a growing portion of the city's population where shops, restaurants, and entertainment are in walking distance. In general, the projects that have been funded through the city's MAPS program illustrate the magnitude and type of strategic projects and programs that will be effective in other central parts of the city for retaining and attracting households.

Federal funding sources for such infrastructure investment and reinvestment continue to be limited. As an entitlement city, Oklahoma City receives an annual allocation of CDBG funding, which although a much more limited source of funding, contributes to the overall strategy of investing in established parts of the city. In the recent past, CDBG funds have been used to fund such projects as the Housing Assistance Program, Strong Neighborhoods Initiative, Midtown Neighborhood Improvement Project, and Urban Renewal Authority activities, all of which contribute to improving the supply and quality of housing available, improving and investing in existing neighborhoods, and creating economic opportunities in underserved areas.

Development Impact Fees

The City should also explore other funding options it may not already have, such as development impact fees. Such a funding source is commonly-used throughout the U.S. to fund public facilities, infrastructure, and amenities to meet demands placed on a community by a growing population. Examples of infrastructure commonly funded through this mechanism include bike paths, parks, trails, and open space, all of which are amenities and desirable neighborhood or community characteristics households identified in the survey. When other public revenue sources are limited and dedicated for other non-operating purposes, development impact fees become an attractive possibility for generating supplemental (albeit not complete) funding for infrastructure projects and programs. As such, it is recommended that the City revisit its discussion of adopting development impact fees as a viable and feasible resource.

Area Plans

The City should create Area Plans for Subareas or neighborhoods within Subareas to address both residential and non-residential development and redevelopment issues. As mentioned in the findings, a diverse housing inventory is as important to economic sustainability as economic development policy.

As such, it will be important for the City to comprehensively identify the needs and development potentials of each area in terms of housing and economic development. While currently not an urgent issue, housing affordability could become an important issue as areas redevelop. Maintaining a diverse economy requires wage-earners across the spectrum, as does maintaining the vitality of neighborhoods with a mix of uses and activity centers.

It is recommended that the City look carefully at Subareas, neighborhoods, and even potentially catalytic redevelopment sites (described in the next policy recommendation) for reuse, revitalization, and redevelopment efforts. This means aligning multiple perspectives such as the creation of attractive neighborhoods and amenities, ensuring a vital mix of business, civic, and pedestrian activity, and identifying partnership opportunities (as also described below). Such an effort could involve the participation of City staff, transportation planners, civil engineers, developers, and land owners to formulate an effective revitalization effort.

Inventory of Sites

As mentioned above, the City should take inventory of its sites, particularly within the areas of transformation identified in this study –6, 7, 10, as well as Downtown. As a part of the larger comprehensive economic considerations, this effort should involve compiling key attributes of City-owned parcels, such as land values, ownership structures, infrastructure deficiencies, potential mitigation or remediation needs, entitlement or zoning issues, and the possibility of overlays or upzoned districts.

Because land acquisition is often a substantial portion of a development's costs, City-owned land that is positioned well in terms of market redevelopment potential serves as a valuable point of leverage for a public-private partnership opportunity. Understanding the value of improved or unimproved city land that can be used as a leveraging tool in a partnership also ensures that the City receives an appropriate level of public infrastructure investment in return, such as streets, sidewalks, or other public amenities that households value.

It is recommended that the City prioritize sites according to their redevelopment potential. Sites should be prioritized and scored according to size, walkability, proximity to transit, proximity to schools, shops, restaurants, entertainment, and employment centers. Ownership of contiguous parcels should also be identified, as should whether the parcels are vacant and/or underutilized. The sites should also be scored according to their market readiness in terms of short-, mid-, or long-term potential. Such measures of each site will enable the City to approach prospective redevelopment opportunities more strategically.

Partnership Opportunities

Along with an assessment of City-owned sites, the City should evaluate partnership opportunities for developing them. Implementation of these strategies will require further understanding of market issues, such as timing and support for redevelopment, scaling, site and structure design, connectivity, project level feasibility, and the potential for use of public financing mechanisms, such as tax-increment finance.

In doing this, the City should orient its objectives for partnership around various public and private criteria. On one hand, the City could orient its objectives on a macro level, identifying general parameters and requirements that a partnership should possess. On the other hand, the City could identify site- or area-specific criteria for partnerships based on more specific needs of the site or area. In some cases, development partnerships that may be appropriate for one type of redevelopment may not be appropriate for other types of redevelopment.

Area-Specific Goals

Households increasingly want housing with proximity to schools, shops, entertainment, work, transportation, as well as access to parks, trails, and open space. Land use planning efforts, such as corridor planning, redevelopment, revitalization, or reinvestment should contain elements to evaluate whether and to what extent projects and programs are creating these desired living environments.

Areas of Transformation

As highlighted by the findings of this report, there are specific Subareas where strategic investment is anticipated to encourage demand for existing and established parts of the city. The neighborhoods identified within the four areas of transformation identified in Chapter 5 illustrate a few of the possibilities for redevelopment within existing and established parts of the city. In general, the City should primarily give priority to those areas in close proximity to jobs and transit as an important economic consideration, but also give priority to areas of greater urban/pedestrian activity – for example, those with proximity to schools, shops, and entertainment.

While the City has focused much of its past redevelopment attention on downtown and Midtown, the City should designate other Subareas central to the city with similarly high priority. Within these areas, the City should encourage the growth and development of mixed-use urban centers, in similar efforts to the redevelopment of downtown and Core to Shore. As indicated throughout this report, households gauge the desirability of a house predominately by the quality of its neighborhood and surroundings. Planning for future centers of activity will become increasingly important for the city as households increasingly choose where to live based on such considerations as proximity to centers of activity with employment opportunities, as well as schools, shops, and entertainment.

Zoning

The City currently has a number of overlay districts that function in a variety of contexts to accomplish different business, economic, or development objectives. The City should re-evaluate each aspect of its overlay districts using a uniform set of criteria to ensure that they are not only internally consistent, but consistent with newer objectives coming out of the planokc process. Such criteria could involve identifying whether and to what extent the various requirements of each overlay district encourages or discourages development and redevelopment.

In general, and where applicable, zoning overlays could be established or redefined to accomplish a variety of objectives, such as encouraging higher densities with the construction of auxiliary dwelling units or constructing duplexes on formerly single-family sites. Furthermore, in areas of transformation identified, and/or where no overlay districts currently exist, the City should evaluate the feasibility of establishing overlay districts that facilitate redevelopment, particularly in areas surrounding major existing or planned transportation corridors. Such districts could encourage redevelopment with the strategic use of incentives, such as density bonuses, fee waivers, etc.

Infrastructure Goals

Housing demand is positively affected by investment in both small and large-scale infrastructure projects and programs. Streets and sidewalks are important, but locationally-driven aspects are increasingly important and less formulaic. As such, infrastructure projects and programs should be assessed by their ability to meet the broader community needs.

Transit

As noted earlier, the City is currently undertaking some major transit projects. Further planning efforts could account for and estimate market potentials and timing, such as where and the extent to which residential and non-residential demand may be facilitated by such major transportation projects. Such an evaluation of opportunities might involve the assessment of project-specific development potentials to more regional strategies. There is also overlap in this effort with the evaluation of public private partnership opportunities and the identification and prioritization of City-owned sites.

Recreational Infrastructure

Habitat and recreational open space, such as parks, pedestrian and bike trails offer broad economic and quality of life benefits and should be funded by broad-based and equitable financing techniques similar to those used for other community facilities.

As it was identified among the higher priorities by households in the survey, the City should invest in the completion of its citywide bike path and trails systems. Together with a comprehensive approach to improving parks and other recreational amenities, as noted earlier, the City should consider alternative funding sources such as development impact fees to supplement the funding of such infrastructure.

Other Considerations

Other infrastructure considerations the city can make relate to household levels of satisfaction in where they live. In the survey, households identified sense of safety, security, and privacy as having greatest importance to them. Not only do they affect household's satisfaction in where they live, but encourage or discourage households from choosing to live in certain parts of the city. By effecting some change in these less tangible elements of a community's infrastructure, the City may encourage growth in existing and established parts of the city.

One idea related to making neighborhoods safer, more secure, and giving households a greater sense of privacy is Oscar Newman's theory of "defensible spaces". In general, the theory characterizes a residential environment by its physical characteristics, such as building layout or site plan. Newman observed that in high-rise housing projects, households did not perceive they had control or personal responsibility for crime prevention, whereas in lower-density projects, households perceived greater sense of ownership of space and therefore took more responsibility in ensuring their security. While not specifically an infrastructure consideration, this objective can be met by encouraging more thoughtful streetscaping, site planning, building layout and design, as well as general neighborhood orientation.

The City might achieve multiple objectives by simultaneously addressing a few other infrastructure issues that are very important to households. Households identified that well-designed sidewalks and bike paths are very important to them (falling in the top five of all 14 characteristics), and as illustrated by the findings in **Appendix B**, there are some Subareas where there is much improvement to be made. Overall, each of these considerations of other types of infrastructure contributes to making neighborhoods more pedestrian in scale and enhancing walkability.

Finally, while outside the scope of this project's purview, and because it is one of households' top considerations in choosing where to live, working to improve the quality of schools should also be one of the City's top priorities. This is particularly relevant for more central parts of the city where housing demand could be much greater with more consistency in quality of public education. In the survey, as illustrated by the analysis of the effect of school quality on Subarea preference, it is estimated that more households would prefer central Subareas over suburban and rural ones.



Appendix A: Supporting Tables and Charts

Supporting Tables and Charts

The following are tables and charts to supplement material in parts of the report with additional detail.

Table A1
Housing Unit Density by Time Period

	Oklahoma City Region													Total Region
	Northwest-Rural (1)	Edmond (2)	Northeast-Rural (3)	Northwest-Urban (4)	Southwest-Urban (5)	Central (6)	Northeast-Urban (7)	Mid-Del (8)	Southwest-Rural (9)	Southeast-Urban (10)	Southeast-Rural (11)	Moore-Norman (12)	Downtown (13)	
Units														
1945 and before	47	655	466	1,996	1,382	17,785	3,609	1,228	365	8,319	60	3,610	796	40,318
1946 to 1980	1,726	10,602	2,976	49,479	29,155	5,533	7,651	27,865	3,312	38,043	641	43,013	689	220,685
1981 to 2000	1,791	14,825	2,966	30,812	7,692	204	312	6,680	3,217	15,384	2,693	20,346	368	107,290
<u>2001 and after</u>	<u>2,982</u>	<u>7,253</u>	<u>2,100</u>	<u>12,715</u>	<u>4,986</u>	<u>178</u>	<u>1,081</u>	<u>3,178</u>	<u>3,053</u>	<u>7,133</u>	<u>2,428</u>	<u>13,827</u>	<u>773</u>	<u>61,687</u>
Total	6,546	33,335	8,508	95,002	43,215	23,700	12,653	38,951	9,947	68,879	5,822	80,796	2,626	429,980
Acres														
1945 and before	27	132	338	670	478	2,524	670	441	111	1,343	44	639	48	7,465
1946 to 1980	821	3,240	1,546	8,804	4,751	671	1,736	6,830	1,165	6,161	649	5,481	19	41,873
1981 to 2000	995	3,600	1,563	4,186	1,415	21	208	1,744	1,253	2,640	1,625	3,243	28	22,521
<u>2001 and after</u>	<u>1,263</u>	<u>1,806</u>	<u>1,661</u>	<u>2,450</u>	<u>934</u>	<u>27</u>	<u>195</u>	<u>984</u>	<u>1,162</u>	<u>1,290</u>	<u>1,478</u>	<u>2,493</u>	<u>23</u>	<u>15,764</u>
Total	3,106	8,779	5,108	16,109	7,578	3,243	2,808	9,999	3,690	11,434	3,795	11,856	118	87,623
Housing Units / Acre														
1945 and before	1.76	4.95	1.38	2.98	2.89	7.05	5.39	2.78	3.28	6.19	1.36	5.65	16.68	5.40
1946 to 1980	2.10	3.27	1.92	5.62	6.14	8.24	4.41	4.08	2.84	6.17	0.99	7.85	36.42	5.27
1981 to 2000	1.80	4.12	1.90	7.36	5.43	9.95	1.50	3.83	2.57	5.83	1.66	6.27	13.22	4.76
<u>2001 and after</u>	<u>2.36</u>	<u>4.01</u>	<u>1.26</u>	<u>5.19</u>	<u>5.34</u>	<u>6.63</u>	<u>5.55</u>	<u>3.23</u>	<u>2.63</u>	<u>5.53</u>	<u>1.64</u>	<u>5.55</u>	<u>33.39</u>	<u>3.91</u>
Total	2.11	3.80	1.67	5.90	5.70	7.31	4.51	3.90	2.70	6.02	1.53	6.81	22.32	4.91

Source: City of Oklahoma City; Economic & Planning Systems

H:\21866-Oklahoma City OK Housing Plan\Data\Tri_County_Parcel\2011Q4.xlsx\Housing Density by Time Period

Table A2
Age Cohort Population Trends, 2000-2010

	2000	2010	2000-2010		
			Total	Ann. #	Ann. %
Nation					
Under 10	39,725,303	40,550,019	824,716	82,472	0.2%
10 to 29	79,093,299	85,405,385	6,312,086	631,209	0.8%
30 to 44	65,658,915	61,032,705	-4,626,210	-462,621	-0.7%
45 to 64	61,952,636	81,489,445	19,536,809	1,953,681	2.8%
<u>65 and older</u>	<u>34,991,753</u>	<u>40,267,984</u>	<u>5,276,231</u>	<u>527,623</u>	<u>1.4%</u>
Total	281,421,906	308,745,538	27,323,632	2,732,363	0.9%
Oklahoma					
Under 10	480,878	523,462	42,584	4,258	0.9%
10 to 29	997,593	1,053,127	55,534	5,553	0.5%
30 to 44	746,143	701,955	-44,188	-4,419	-0.6%
45 to 64	770,090	966,093	196,003	19,600	2.3%
<u>65 and older</u>	<u>455,950</u>	<u>506,714</u>	<u>50,764</u>	<u>5,076</u>	<u>1.1%</u>
Total	3,450,654	3,751,351	300,697	30,070	0.8%
Oklahoma City MSA					
Under 10	134,039	157,234	23,195	2,320	1.6%
10 to 29	292,479	323,829	31,350	3,135	1.0%
30 to 44	216,230	213,874	-2,356	-236	-0.1%
45 to 64	206,796	269,882	63,086	6,309	2.7%
<u>65 and older</u>	<u>106,617</u>	<u>125,110</u>	<u>18,493</u>	<u>1,849</u>	<u>1.6%</u>
Total	956,161	1,089,929	133,768	13,377	1.3%

Source: U.S. Census; Economic & Planning Systems

H:\21866-Oklahoma City OK Housing Plan\Data\21866-Population by Age.xlsx\Summary

Table A3
U.S. Population Trends by Age, 2000-2010

				2000-2010	
				Total	as % of Change
		2000	2010		
Generational Group (2010)	Age Group				
Millennials (born 2000 and after)	Under 5 years	19,175,798	20,201,362	1,025,564	4%
	5 to 9 years	20,549,505	20,348,657	-200,848	-1%
Generation Y (born 1982-1999)	10 to 14 years	20,528,072	20,677,194	149,122	1%
	15 to 19 years	20,219,890	22,040,343	1,820,453	7%
	20 to 24 years	18,964,001	21,585,999	2,621,998	10%
	25 to 29 years	19,381,336	21,101,849	1,720,513	6%
Generation X (born 1965-1981)	30 to 34 years	20,510,388	19,962,099	-548,289	-2%
	35 to 39 years	22,706,664	20,179,642	-2,527,022	-9%
	40 to 44 years	22,441,863	20,890,964	-1,550,899	-6%
Baby Boomer (born 1946-1964)	45 to 49 years	20,092,404	22,708,591	2,616,187	10%
	50 to 54 years	17,585,548	22,298,125	4,712,577	17%
	55 to 59 years	13,469,237	19,664,805	6,195,568	23%
	60 to 64 years	10,805,447	16,817,924	6,012,477	22%
Silent Generation (born 1925-1945)	65 to 69 years	9,533,545	12,435,263	2,901,718	11%
	70 to 74 years	8,857,441	9,278,166	420,725	2%
	75 to 79 years	7,415,813	7,317,795	-98,018	0%
	80 to 84 years	4,945,367	5,743,327	797,960	3%
<u>Born 1901-1924</u>	<u>85 years and over</u>	<u>4,239,587</u>	<u>5,493,433</u>	<u>1,253,846</u>	<u>5%</u>
Total	Total	281,421,906	308,745,538	27,323,632	100%

Source: U.S. Census; Economic & Planning Systems

H:\21866-Oklahoma City OK Housing Plan\Data\21866-Population by Age.xlsx\US

Table A4
State of Oklahoma Population Trends by Age, 2000-2010

				2000-2010	
				Total	as % of Change
		2000	2010		
Generational Group (2010)	Age Group				
Millenials (born 2000 and after)	Under 5 years	236,353	264,126	27,773	9%
	5 to 9 years	244,525	259,336	14,811	5%
Generation Y (born 1982-1999)	10 to 14 years	252,029	253,664	1,635	1%
	15 to 19 years	269,373	264,484	-4,889	-2%
	20 to 24 years	247,165	269,242	22,077	7%
	25 to 29 years	229,026	265,737	36,711	12%
Generatinon X (born 1965-1981)	30 to 34 years	222,621	241,018	18,397	6%
	35 to 39 years	259,131	232,742	-26,389	-9%
	40 to 44 years	264,391	228,195	-36,196	-12%
Baby Boomer (born 1946-1964)	45 to 49 years	240,805	261,242	20,437	7%
	50 to 54 years	212,956	264,369	51,413	17%
	55 to 59 years	173,199	235,969	62,770	21%
	60 to 64 years	143,130	204,513	61,383	20%
Silent Generation(born 1925-1945)	65 to 69 years	128,756	159,392	30,636	10%
	70 to 74 years	113,743	121,075	7,332	2%
	75 to 79 years	94,068	95,051	983	0%
	80 to 84 years	62,208	69,284	7,076	2%
<u>Born 1901-1924</u>	<u>85 years and over</u>	<u>57,175</u>	<u>61,912</u>	<u>4,737</u>	<u>2%</u>
Total	Total	3,450,654	3,751,351	300,697	100%

Source: U.S. Census; Economic & Planning Systems

H:\21866-Oklahoma City OK Housing Plan\Data\21866-Population by Age.xlsx\OK

Table A5
Oklahoma City MSA Population Trends by Age, 2000-2010

				2000-2010	
				Total	as % of Change
		2000	2010		
Generational Group (2010)	Age Group				
Millennials (born 2000 and after)	Under 5 years	67,294	80,593	13,299	10%
	5 to 9 years	66,745	76,641	9,896	7%
Generation Y (born 1982-1999)	10 to 14 years	67,711	72,063	4,352	3%
	15 to 19 years	74,198	74,890	692	1%
	20 to 24 years	78,095	88,242	10,147	8%
	25 to 29 years	72,475	88,634	16,159	12%
Generation X (born 1965-1981)	30 to 34 years	65,935	76,740	10,805	8%
	35 to 39 years	74,550	70,820	-3,730	-3%
	40 to 44 years	75,745	66,314	-9,431	-7%
Baby Boomer (born 1946-1964)	45 to 49 years	68,304	74,294	5,990	4%
	50 to 54 years	58,994	74,933	15,939	12%
	55 to 59 years	44,419	65,573	21,154	16%
	60 to 64 years	35,079	55,082	20,003	15%
Silent Generation(born 1925-1945)	65 to 69 years	30,514	39,186	8,672	6%
	70 to 74 years	27,202	29,187	1,985	1%
	75 to 79 years	22,444	23,234	790	1%
	80 to 84 years	14,162	17,557	3,395	3%
<u>Born 1901-1924</u>	<u>85 years and over</u>	<u>12,295</u>	<u>15,946</u>	<u>3,651</u>	<u>3%</u>
Total	Total	956,161	1,089,929	133,768	100%

Source: U.S. Census; Economic & Planning Systems

H:\21866-Oklahoma City OK Housing Plan\Data\21866-Population by Age.xlsx\OKC MSA

Table A6
Age Cohort Population Forecast, 2010-2030

				Growth		Rates	
	2010	2020	2030	10-20	20-30	10-20	20-30
Age Category							
Under 25	205,966	237,333	274,098	31,367	36,764	1.43%	1.45%
25 to 34	91,908	98,319	108,588	6,411	10,269	0.68%	1.00%
35 to 44	74,288	90,096	99,787	15,808	9,692	1.95%	1.03%
45 to 54	78,944	70,733	84,814	-8,211	14,081	-1.09%	1.83%
55 to 64	63,497	71,676	62,549	8,179	-9,127	1.22%	-1.35%
65 to 74	35,339	52,709	58,050	17,370	5,341	4.08%	0.97%
<u>75 and over</u>	<u>30,070</u>	<u>37,171</u>	<u>55,757</u>	<u>7,101</u>	<u>18,586</u>	<u>2.14%</u>	<u>4.14%</u>
Total	580,012	658,037	743,644	78,025	85,606	1.27%	1.23%

Source: City of Oklahoma City; Economic & Planning Systems

H:\21866-Oklahoma City OK Housing Plan\Data\21866-City Population Projections.xlsx\Table

Table A7
Housing Inventory by Time Period

	Oklahoma City Region						Total Region
	Single-Family	Small Lot Single-Family	Apartment / Condo / Loft	Duplex / Triplex	Townhome	Other	
Units							
1945 and before	33,122	2,532	3,205	4,185	0	4	43,048
1946 to 1980	157,221	1,363	49,451	3,732	9,121	5,375	226,263
1981 to 2000	67,317	2,567	29,472	5,197	1,928	4,303	110,784
<u>2001 and after</u>	<u>46,387</u>	<u>2,394</u>	<u>10,907</u>	<u>2,076</u>	<u>139</u>	<u>1,191</u>	<u>63,094</u>
Total	304,047	8,856	93,035	15,190	11,188	10,873	443,189
as % of Total	69%	2%	21%	3%	3%	2%	100%
% of Unit Types Built per Time Period							
1945 and before	11%	29%	3%	28%	0%	0%	10%
1946 to 1980	52%	15%	53%	25%	82%	49%	51%
1981 to 2000	22%	29%	32%	34%	17%	40%	25%
<u>2001 and after</u>	<u>15%</u>	<u>27%</u>	<u>12%</u>	<u>14%</u>	<u>1%</u>	<u>11%</u>	<u>14%</u>
Total	100%	100%	100%	100%	100%	100%	100%

[Note 1]: Small Lot Single-Family is defined as approximately 5,500 sqft or less.

Source: City of Oklahoma City; Economic & Planning Systems

H:\21866-Oklahoma City OK Housing Plan\Data\Tri_County_Parcel_2011Q4.xlsx\Housing by Period

Table A8
Housing by Subarea

	Oklahoma City Region													Total Region
	Northwest-Rural (1)	Edmond (2)	Northwest-Rural (3)	Northwest-Urban (4)	Southwest-Urban (5)	Central (6)	Northwest-Urban (7)	Mid-Dei (8)	Southwest-Rural (9)	Southwest-Urban (10)	Southwest-Rural (11)	Moore-Norman (12)	Downtown (13)	
Housing Type														
Single-Family	6,718	24,436	7,104	60,889	29,402	15,690	9,627	30,218	9,269	49,961	3,881	47,122	322	294,639
Small Lot Single-Family	8	362	63	1,587	651	958	247	206	95	2,308	2	1,838	81	8,406
Apartment / Condo / Loft	46	5,618	867	27,912	10,485	3,865	2,341	5,890	37	13,587	85	21,568	2,246	94,547
Duplex / Triplex	60	1,318	197	3,987	1,617	3,250	865	1,144	202	2,184	0	238	83	15,145
Townhome	0	986	107	1,209	89	6	10	393	0	5	0	8,348	35	11,188
<u>Other</u>	<u>31</u>	<u>616</u>	<u>251</u>	<u>9</u>	<u>1,749</u>	<u>5</u>	<u>45</u>	<u>1,100</u>	<u>365</u>	<u>1,254</u>	<u>1,866</u>	<u>1,756</u>	<u>0</u>	<u>9,047</u>
Total	6,863	33,336	8,589	95,593	43,993	23,774	13,135	38,951	9,968	69,299	5,834	80,870	2,767	432,972
Housing Type														
Single-Family	98%	73%	83%	64%	67%	66%	73%	78%	93%	72%	67%	58%	12%	68%
Small Lot Single-Family	0%	1%	1%	2%	1%	4%	2%	1%	1%	3%	0%	2%	3%	2%
Apartment / Condo / Loft	1%	17%	10%	29%	24%	16%	18%	15%	0%	20%	1%	27%	81%	22%
Duplex / Triplex	1%	4%	2%	4%	4%	14%	7%	3%	2%	3%	0%	0%	3%	3%
Townhome	0%	3%	1%	1%	0%	0%	0%	1%	0%	0%	0%	10%	1%	3%
<u>Other</u>	<u>0%</u>	<u>2%</u>	<u>3%</u>	<u>0%</u>	<u>4%</u>	<u>0%</u>	<u>0%</u>	<u>3%</u>	<u>4%</u>	<u>2%</u>	<u>32%</u>	<u>2%</u>	<u>0%</u>	<u>2%</u>
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: City of Oklahoma City; Economic & Planning Systems

H:\21866-Oklahoma City OK Housing Plan\Data\Tri_County_Parcel_2011Q4.xlsx\Housing Mix

Table A9
Where Households are Likely to Move by Subarea

	Subarea													
	Northwest- Rural (1)	Edmond (2)	Northeast- Rural (3)	Northwest- Urban (4)	Southwest- Urban (5)	Central (6)	Northeast- Urban (7)	Mid-Del (8)	Southwest- Rural (9)	Southeast- Urban (10)	Southeast- Rural (11)	Moore- Norman (12)	Downtown (13)	Total Region
Next 1 to 5 Years														
Don't know	6%	9%	10%	8%	9%	6%	12%	8%	9%	7%	6%	11%	17%	8%
Don't plan on moving	55%	42%	57%	46%	40%	51%	51%	43%	47%	40%	57%	39%	30%	45%
Move outside region	9%	14%	14%	13%	14%	14%	8%	16%	12%	18%	14%	18%	15%	14%
<u>Move within region</u>	<u>30%</u>	<u>36%</u>	<u>19%</u>	<u>33%</u>	<u>37%</u>	<u>29%</u>	<u>30%</u>	<u>32%</u>	<u>32%</u>	<u>35%</u>	<u>23%</u>	<u>32%</u>	<u>37%</u>	<u>32%</u>
Total - Next 1 to 5 Years	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Next 6 to 10 Years														
Don't know	25%	33%	35%	23%	25%	18%	20%	34%	23%	30%	15%	31%	22%	27%
Don't plan on moving	30%	21%	30%	26%	27%	30%	39%	20%	27%	24%	37%	22%	20%	26%
Move outside region	22%	22%	8%	18%	23%	18%	21%	18%	30%	19%	21%	23%	31%	20%
<u>Move within region</u>	<u>22%</u>	<u>24%</u>	<u>27%</u>	<u>32%</u>	<u>25%</u>	<u>34%</u>	<u>19%</u>	<u>28%</u>	<u>21%</u>	<u>26%</u>	<u>27%</u>	<u>24%</u>	<u>27%</u>	<u>27%</u>
Total - Next 6 to 10 Years	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Next 10 to 20 Years														
Don't know	41%	51%	51%	43%	46%	35%	41%	47%	42%	44%	28%	47%	38%	44%
Don't plan on moving	18%	12%	15%	19%	21%	21%	29%	18%	31%	24%	26%	17%	14%	19%
Move outside region	24%	20%	15%	15%	17%	17%	17%	15%	18%	17%	24%	23%	27%	18%
<u>Move within region</u>	<u>16%</u>	<u>16%</u>	<u>20%</u>	<u>22%</u>	<u>16%</u>	<u>27%</u>	<u>13%</u>	<u>20%</u>	<u>9%</u>	<u>16%</u>	<u>23%</u>	<u>13%</u>	<u>21%</u>	<u>19%</u>
Total - Next 10 to 20 Years	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Economic & Planning Systems

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Table A10
Where Households are Likely to Move by Age

	Combined					as % of Total			
	Don't know	Don't plan on moving	Move outside region	Move within region	Total	Don't know	Don't plan on moving	Move outside region	Move within region
Next 1 to 5 Years									
18 to 24	65	86	121	216	487	13%	18%	25%	44%
25 to 34	63	230	120	314	726	9%	32%	16%	43%
35 to 44	37	246	56	146	484	8%	51%	12%	30%
45 to 54	26	252	38	102	418	6%	60%	9%	24%
55 to 64	26	252	34	59	370	7%	68%	9%	16%
65 to 74	7	127	14	36	183	4%	69%	8%	20%
75 and over	<u>8</u>	<u>59</u>	<u>5</u>	<u>6</u>	<u>78</u>	<u>10%</u>	<u>76%</u>	<u>7%</u>	<u>7%</u>
Total	231	1,250	388	878	2,747	8%	46%	14%	32%
Next 6 to 10 Years									
18 to 24	157	26	153	104	440	36%	6%	35%	24%
25 to 34	219	118	146	213	695	31%	17%	21%	31%
35 to 44	124	126	86	135	471	26%	27%	18%	29%
45 to 54	65	145	64	120	395	16%	37%	16%	30%
55 to 64	59	146	48	95	348	17%	42%	14%	27%
65 to 74	30	88	16	41	175	17%	50%	9%	24%
75 and over	<u>11</u>	<u>39</u>	<u>2</u>	<u>13</u>	<u>65</u>	<u>17%</u>	<u>60%</u>	<u>2%</u>	<u>21%</u>
Total	665	689	514	722	2,588	26%	27%	20%	28%
Next 10 to 20 Years									
18 to 24	236	56	104	43	439	54%	13%	24%	10%
25 to 34	339	82	130	143	695	49%	12%	19%	21%
35 to 44	223	82	89	80	474	47%	17%	19%	17%
45 to 54	133	92	73	95	394	34%	23%	19%	24%
55 to 64	103	107	52	85	348	30%	31%	15%	24%
65 to 74	55	64	18	37	173	32%	37%	10%	21%
75 and over	<u>19</u>	<u>33</u>	<u>2</u>	<u>8</u>	<u>61</u>	<u>31%</u>	<u>53%</u>	<u>3%</u>	<u>13%</u>
Random Sample	1,109	516	468	491	2,583	43%	20%	18%	19%

Source: Economic & Planning Systems

H:\21866-OKlahoma City OK Housing Plan\Data\21866-Data-10 14 13.xlsx\q20.3 Table

Figure A1
Trade Offs

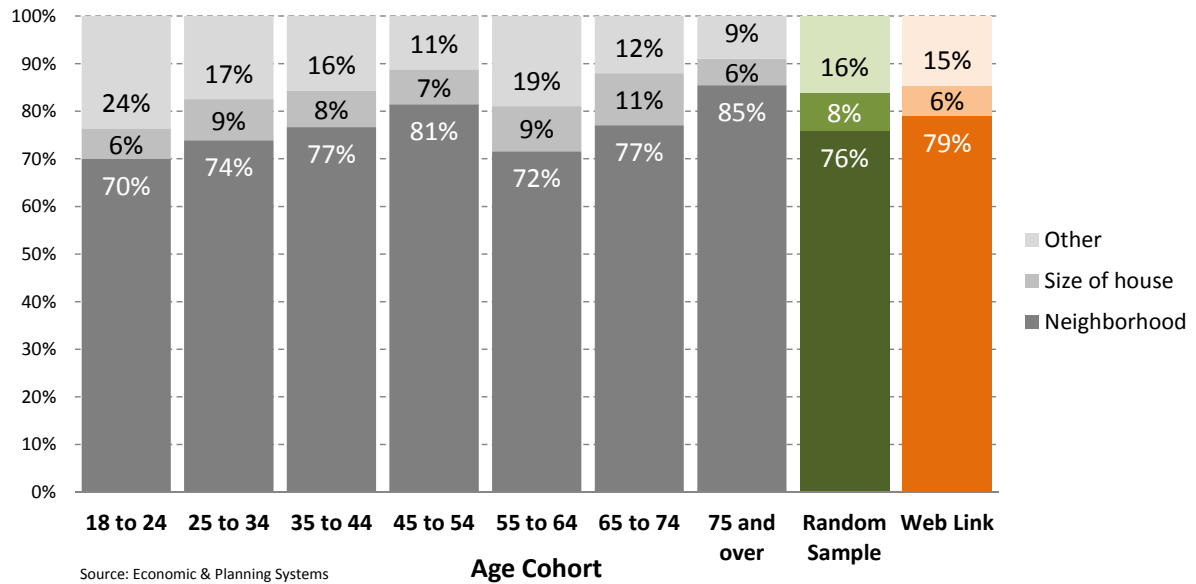


Figure A2
Type of Neighborhood

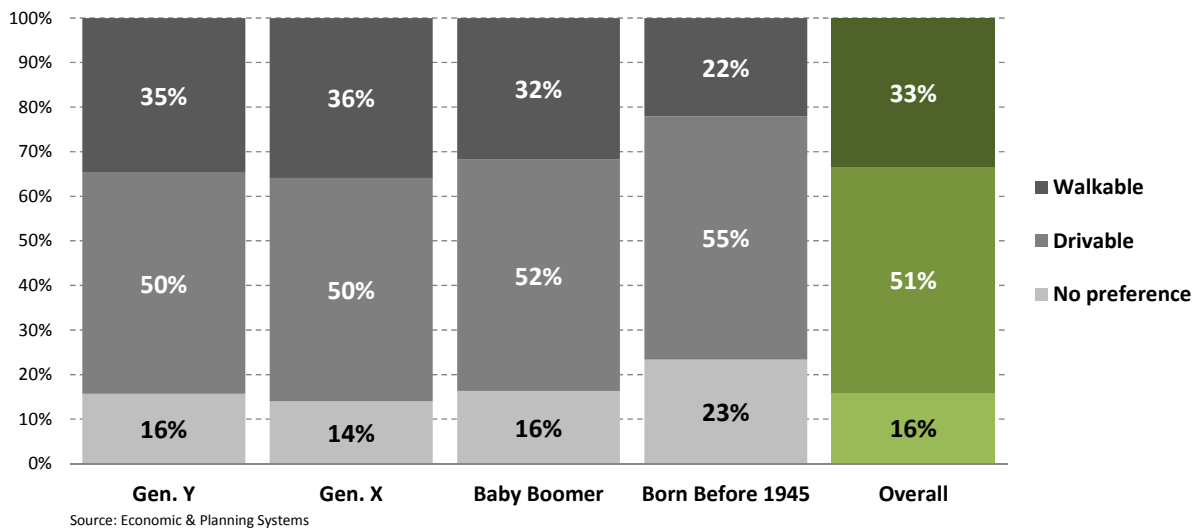


Figure A3
Size of Next House

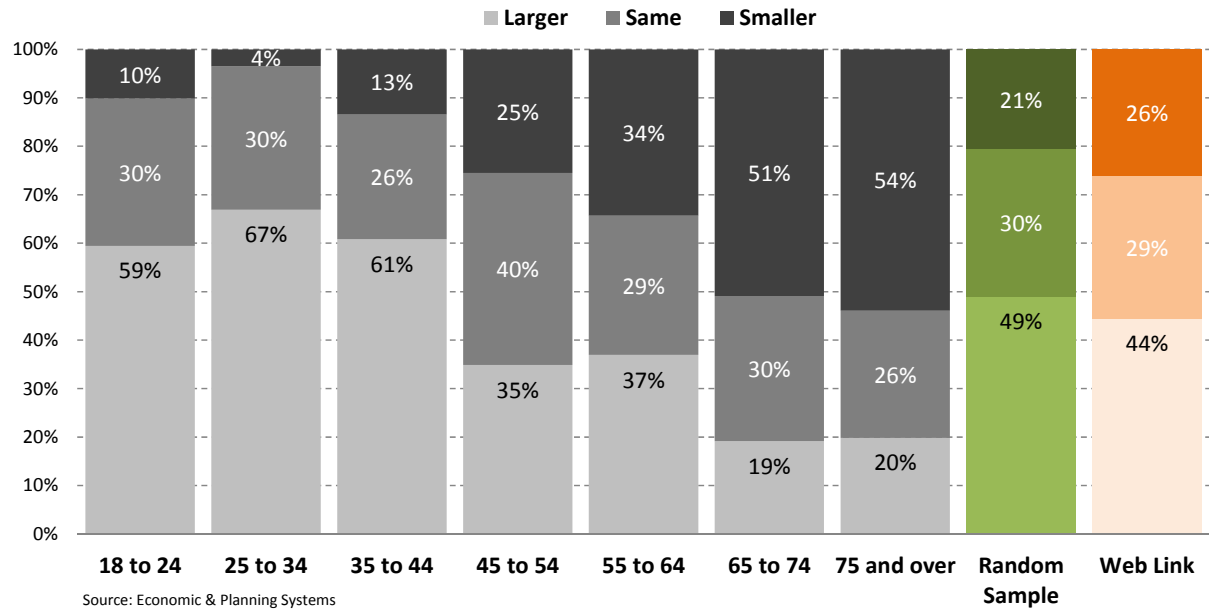


Figure A4
Willingness to Pay 10% More to Cut Commute Time by Age

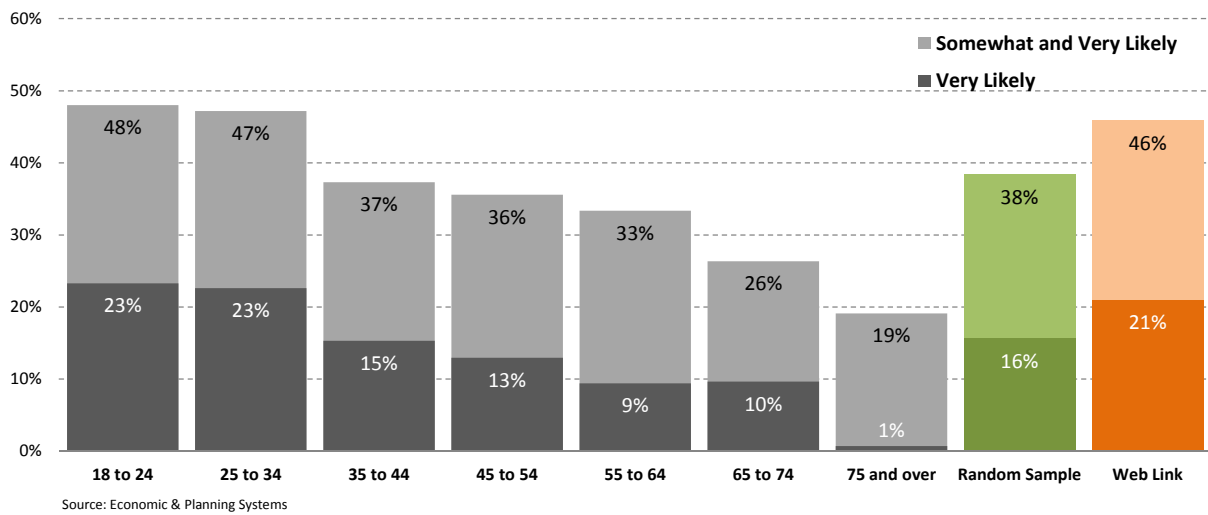


Figure A5
Willingness to Pay 10% More for Higher Quality Schools by Age

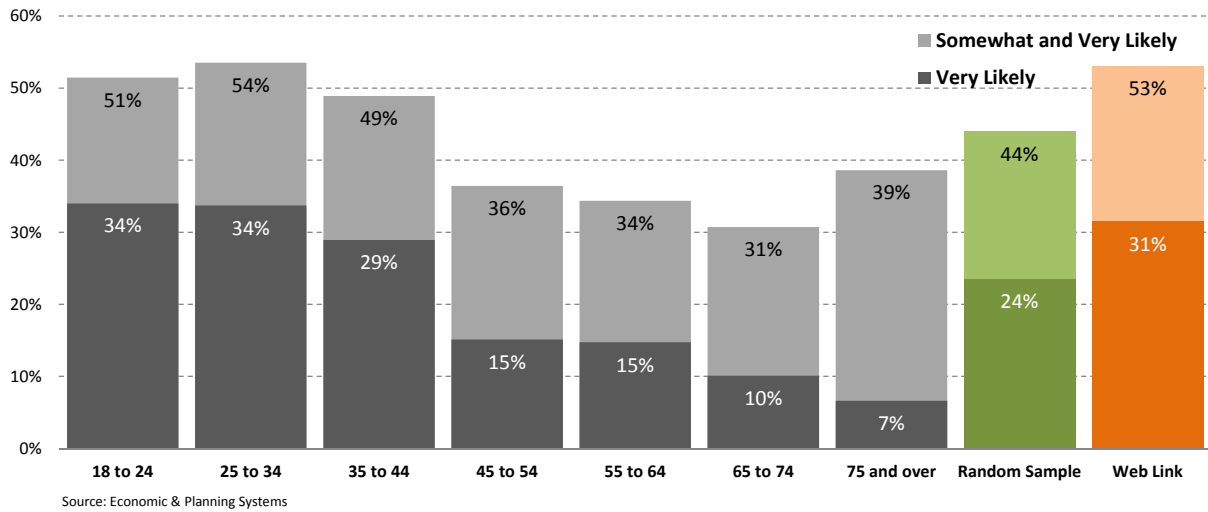


Table A11
Likelihood of Moving by Age Category

	Age Category							Total
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 and over	
Next 1 to 5 Years								
Very Unlikely	11%	19%	38%	49%	52%	58%	64%	34%
Somewhat Unlikely	4%	10%	12%	14%	16%	13%	11%	11%
Somewhat Likely	21%	24%	19%	18%	16%	19%	14%	20%
<u>Very Likely</u>	<u>64%</u>	<u>47%</u>	<u>31%</u>	<u>20%</u>	<u>16%</u>	<u>10%</u>	<u>11%</u>	<u>35%</u>
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Economic & Planning Systems

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Appendix B: Survey Response Overview

Importance and Satisfaction by Age

The following series of responses identifies the extent people value housing, neighborhood, and locational characteristics, as well as to what extent their needs are being satisfied. Each chart displays the level of importance and satisfaction by age category of respondent. Following this section is a repetition of this section cross-tabulated by Subarea.

Size of Home

Home size is very important to 40 percent of people surveyed; it increases toward the middle of the age spectrum. The importance one places on home size seems only to increase toward the age category 35 to 44 and decrease after that. Interestingly, average home size of respondents also peaks at the 35 to 44 category and decreases after that. For 18 to 44 year olds, a larger home equates to greater satisfaction. Overall, home size is generally important to households that don't currently have a large (or satisfactorily large) home, but becomes decreasingly important.

Figure B1
Home Size Importance

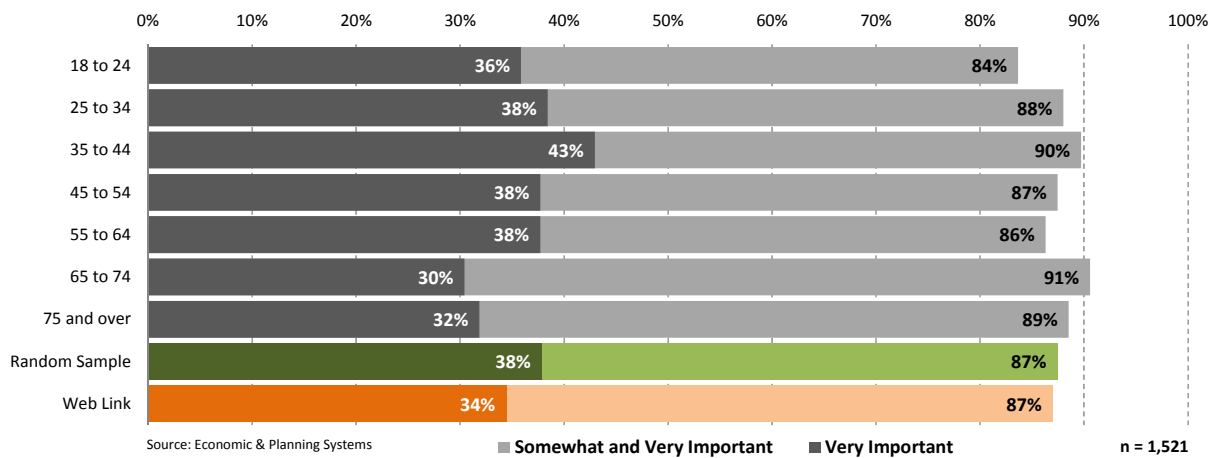
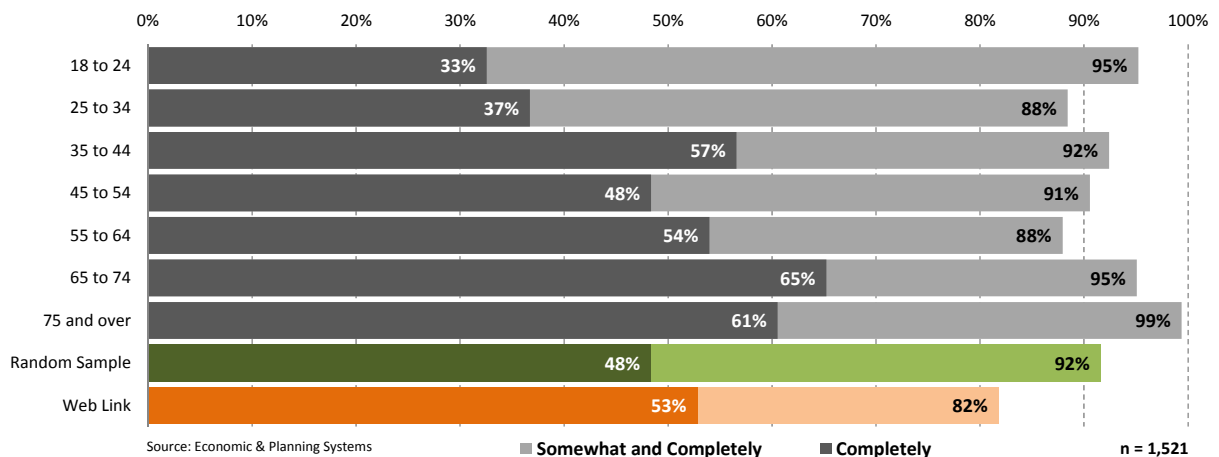


Figure B2
Home Size Meeting Needs



Size of Lot

An interesting result relevant to the development industry, lot size does not appear to have as great an importance for households as size of house does. Overall, lot size is only important to approximately 25 percent of households and approximately half of households surveyed indicated their complete satisfaction with their current lot sizes. It is important to note also that the survey data indicate that people live in houses on smaller lots as they age.

Figure B3
Lot Size Importance

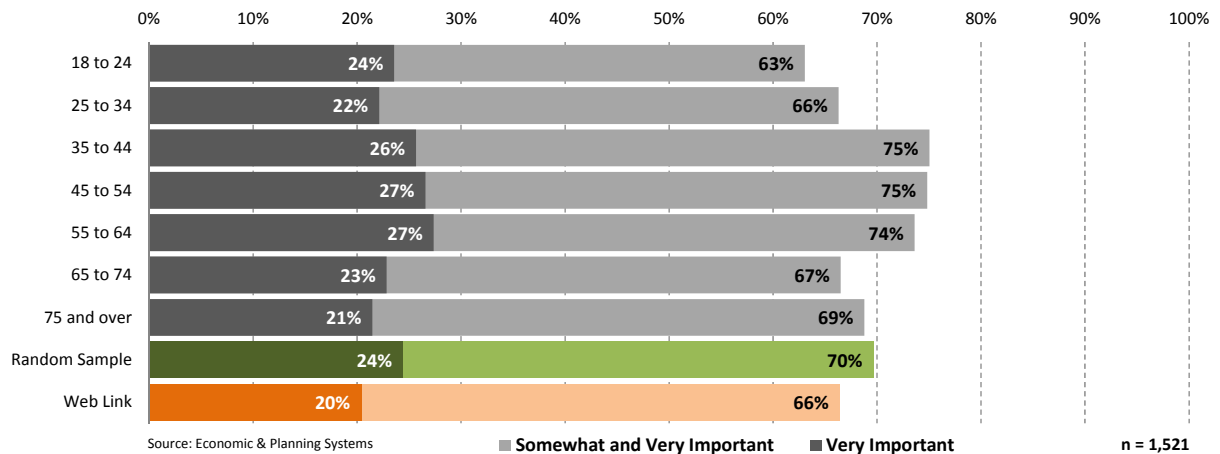
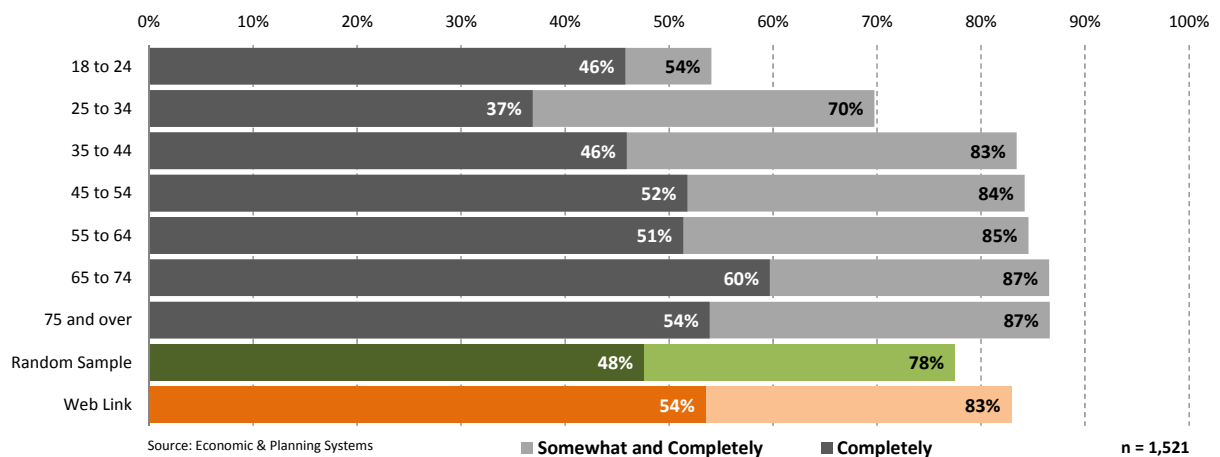


Figure B4
Lot Size Meeting Needs



Contemporary/Recent Construction

The importance of contemporary or recent construction is more important for younger ages than older age, but there is little difference between those completely satisfied by their current homes. Overall, contemporary or recent construction becomes decreasingly important to households as they age.

Figure B5
Contemporary/Recent Construction Importance

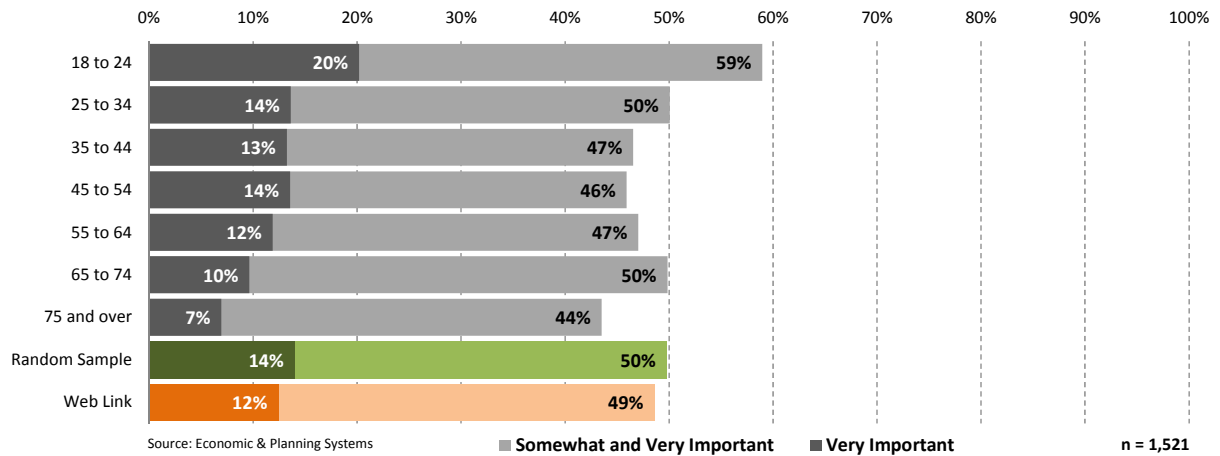
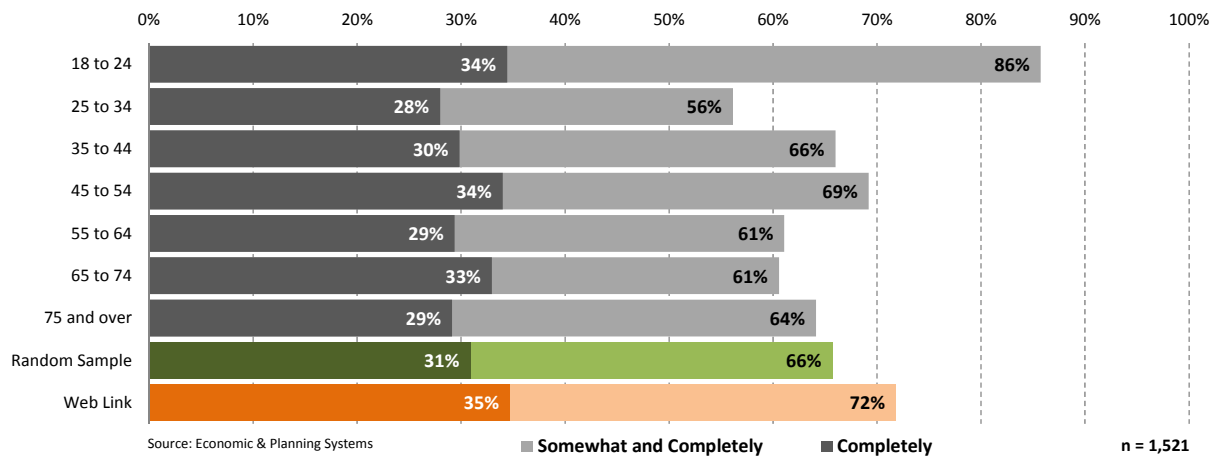


Figure B6
Contemporary/Recent Construction Meeting Needs



Price

Price is one of the more important characteristics of one's home, neighborhood, and community. Overall, nearly 80 percent of people say it is very important, where its value is highest at the younger age categories and drops as one ages. As household incomes tend to increase toward the 45 to 54 age category, one's satisfaction increases as purchasing power also increases. As with a few other preferences with respect to age, the price of a house becomes less important to households with age, just as the relative importance of other attributes like sense of safety, security, sense of place, etc. becomes greater with age.

Figure B7
Price Importance

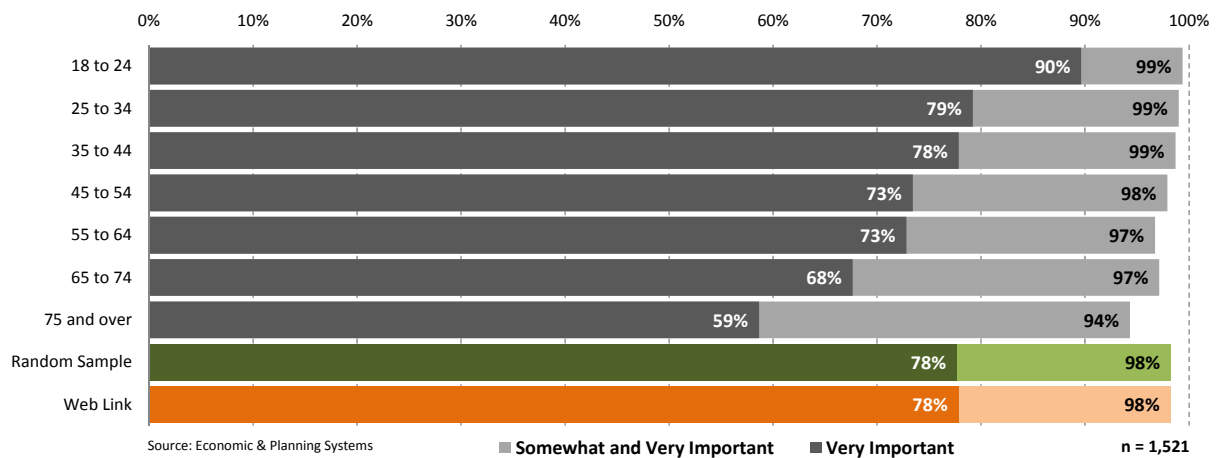
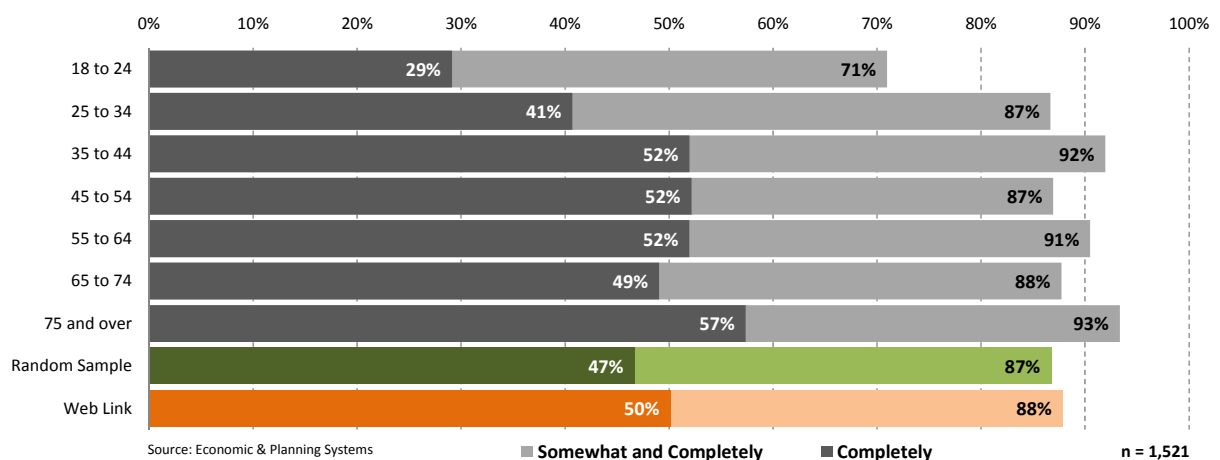


Figure B8
Price Meeting Needs



Curb Appeal/Construction Quality

Unlike contemporary or recent construction, construction quality is very important to a majority of respondents. In fact, it is increasingly important for the middle of the age spectrum. And while satisfaction in one's current housing seems to increase from the younger to older age categories, the level of satisfaction in current housing is much lower. In general, the younger age cohorts are less satisfied with the curb appeal and construction quality of their home, neighborhoods, and community.

Figure B9
Curb Appeal/Construction Quality Importance

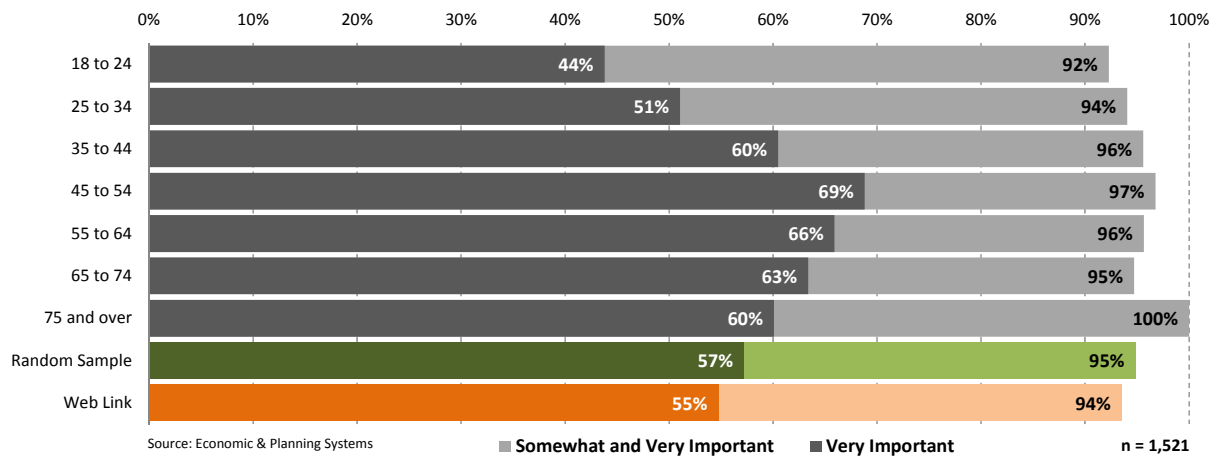
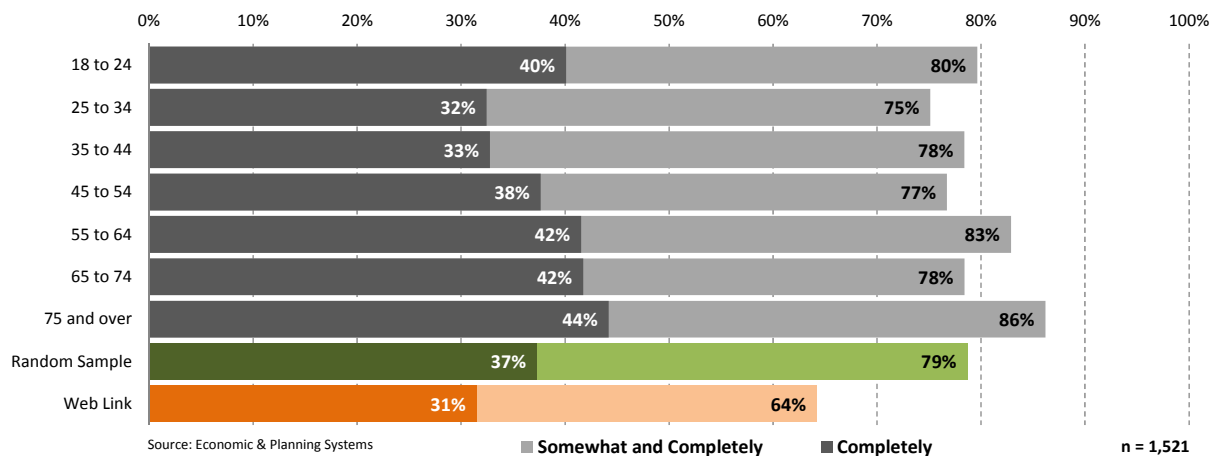


Figure B10
Curb Appeal/Construction Quality Meeting Needs



Historic Character

Historic character is generally very important to a small portion of households, according to the community survey. There is a slight trend upward to the ages 45 to 54 in the importance and a general downward trend to the older age cohorts. The scattered nature of satisfaction levels suggests no real pattern to this neighborhood attribute as with others.

Figure B11
Historic Character Importance

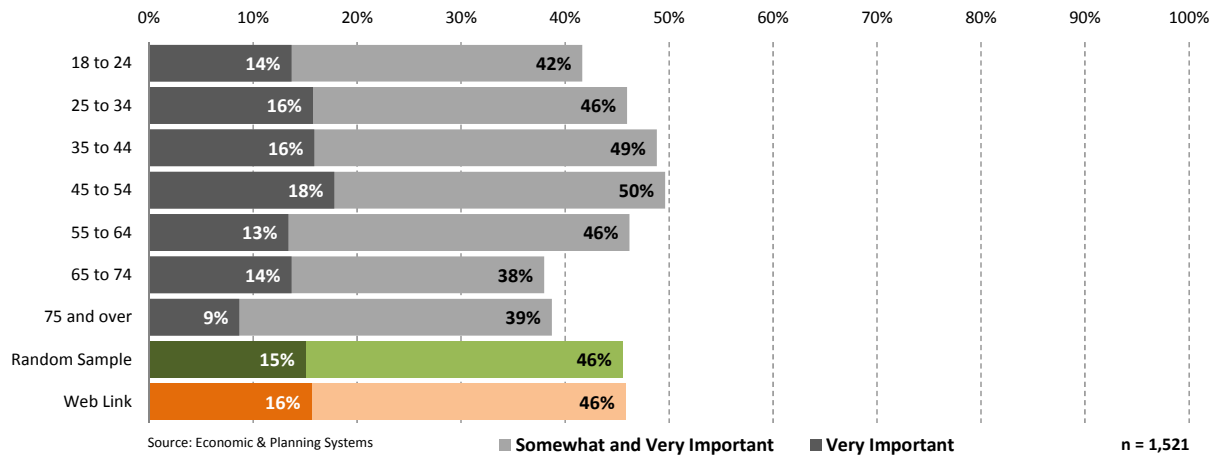
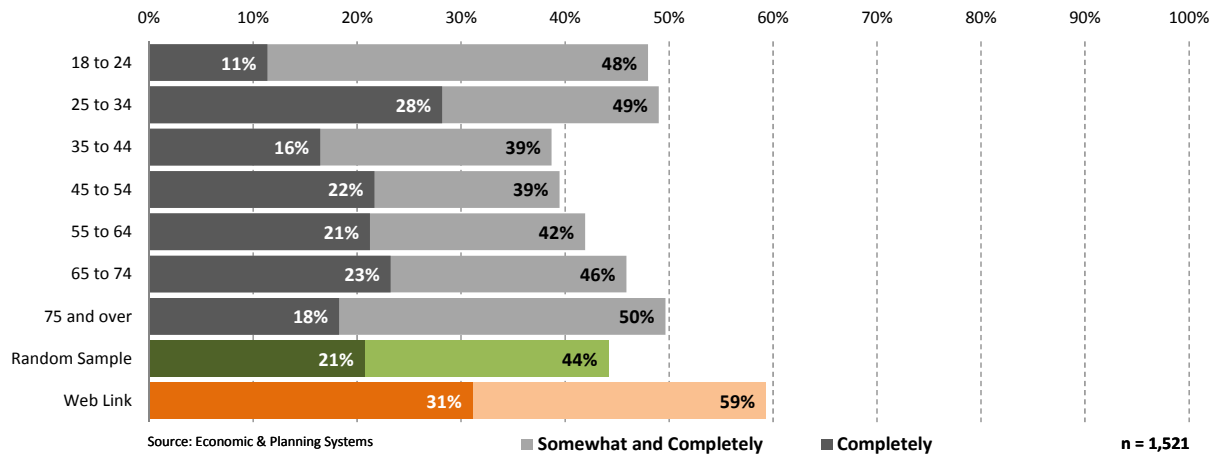


Figure B12
Historic Character Meeting Needs



Well-Designed Sidewalks and Bike Paths

This aspect of a neighborhood carries huge implications for housing demand in the future. Approximately half of households indicated that sidewalks and bike paths were very important aspects of where they live, but expressed generally very low satisfaction levels with existing conditions. Among age groups, it seems to be increasingly important up to the 35 to 44 age group and decreasingly important beyond that. Satisfaction levels, however, were nearly constant among the age groups. As indicated previously, increasing satisfaction level for households throughout the city increased demand potential in a few of the Subareas.

Figure B13
Well-Designed Sidewalks/Bike Paths Importance

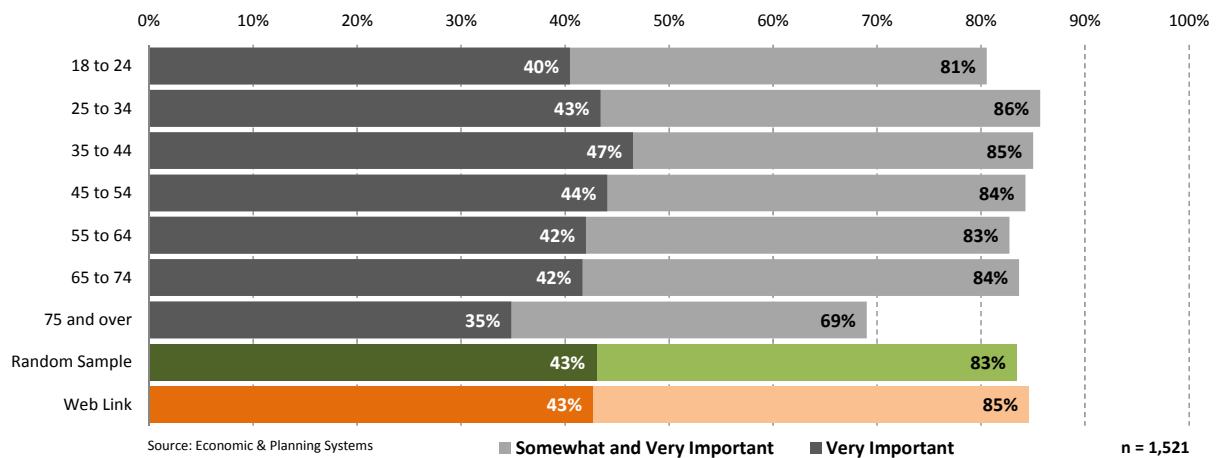
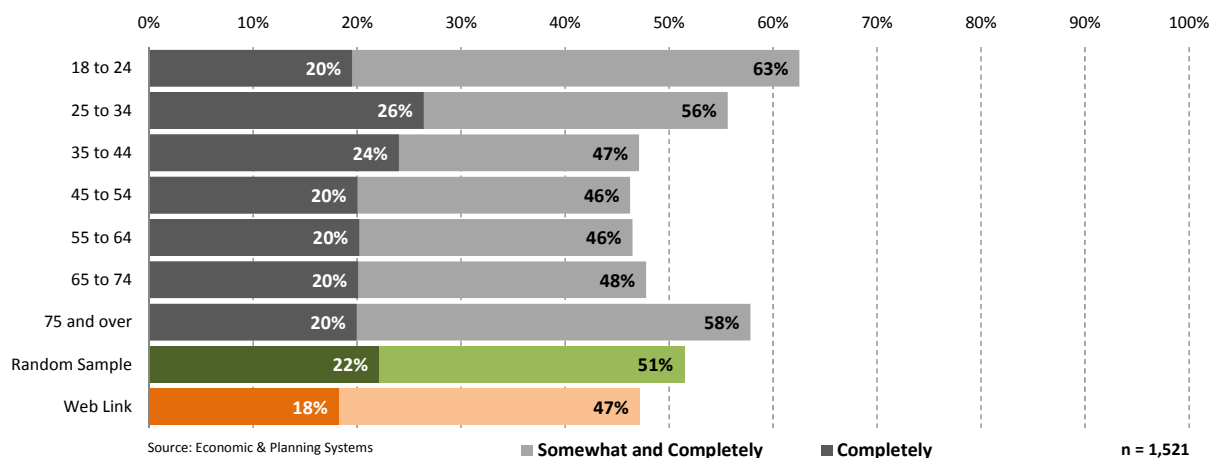


Figure B14
Well-Designed Sidewalks/Bike Paths Meeting Needs



Sense of Privacy

Sense of privacy is also high on people's list of very important housing, neighborhood, and community considerations. Six out of ten say it is very important, and this figure generally increases with age. Satisfaction with one's sense of privacy also tends to increase with age, but more dramatically. The lower level of satisfaction level, however, indicates that more can be done to establish this sense throughout Oklahoma City.

Figure B15
Sense of Privacy Importance

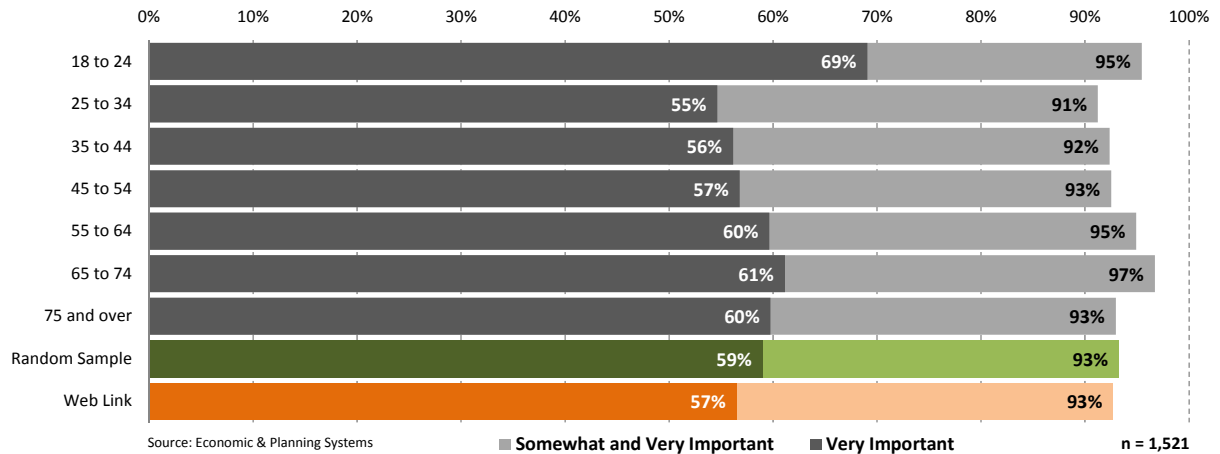
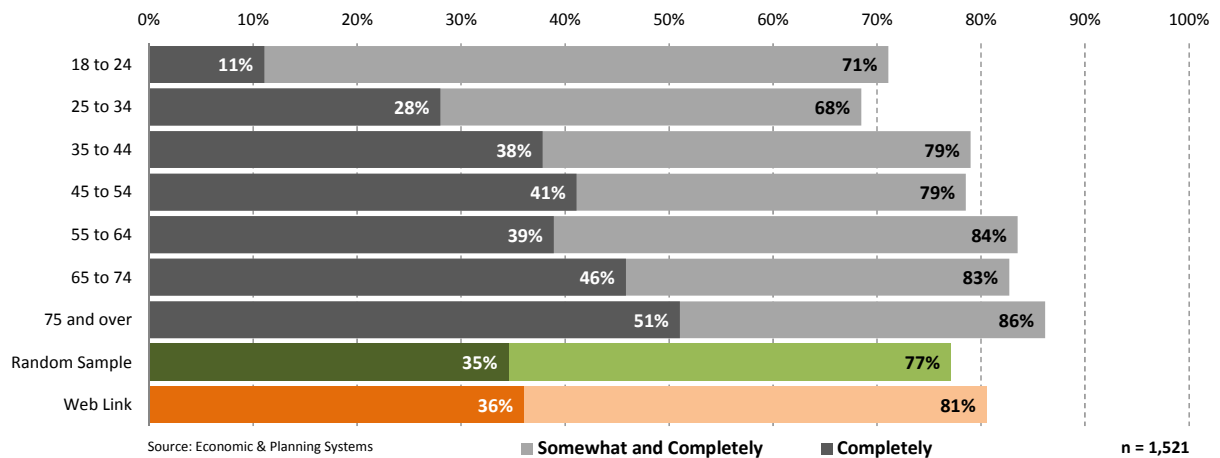


Figure B16
Sense of Privacy Meeting Needs



Sense of Safety and Security

Nearly all respondents said that this was somewhat and very important to them. For those who indicated it was very important, sense of safety and security seems to increase with age from 25 to 74, whereas more than nine out of ten 18 to 24 year-olds perceive it to be very important. And as with many of the differentials in age trends, one's satisfaction with sense of safety and security increases over time.

Figure B17
Sense of Safety/Security Importance

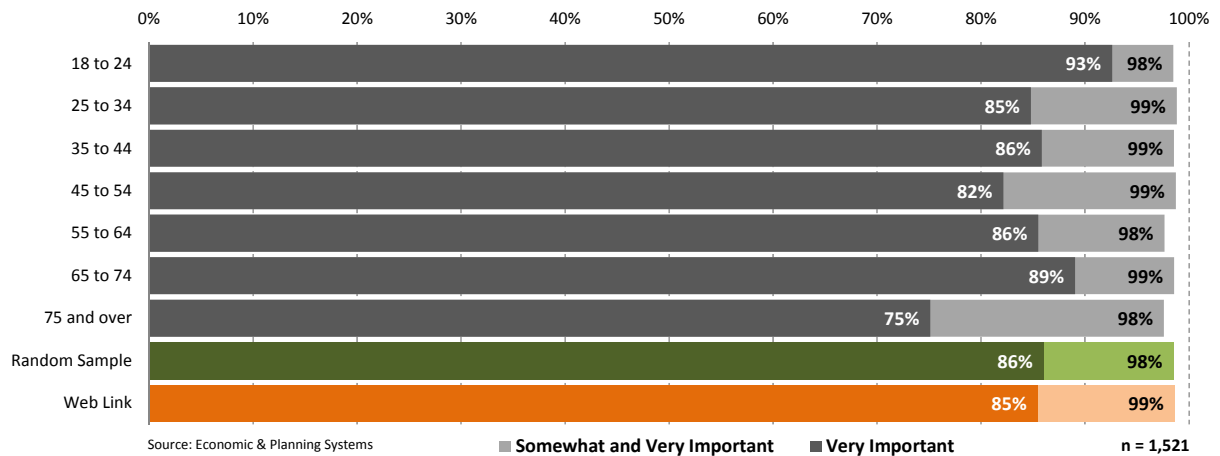
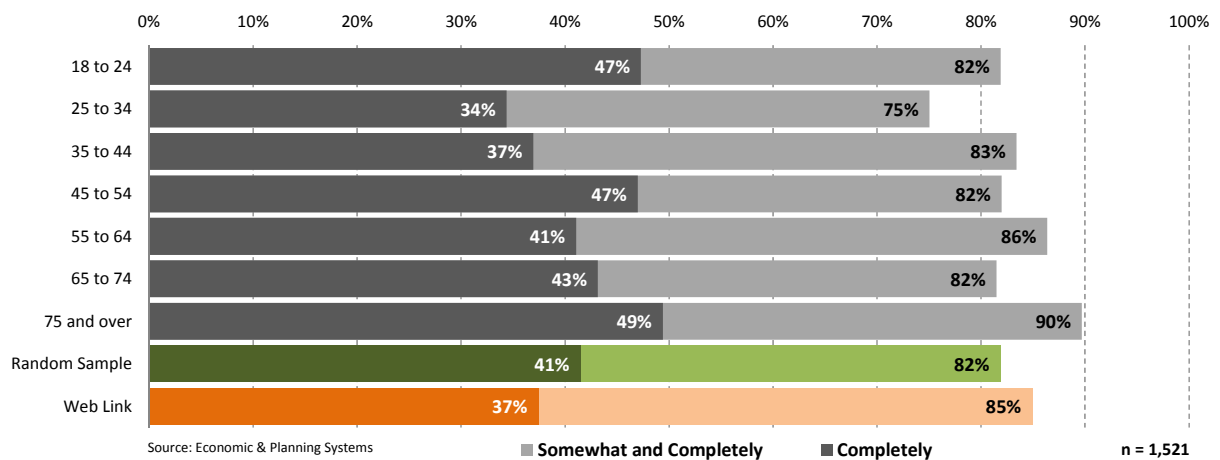


Figure B18
Sense of Safety/Security Meeting Needs



Variety of Housing Types

Comparatively, having a variety of housing types was less important than other housing, neighborhood, or community characteristics, but satisfaction levels were also fairly low. In general, about one out of every five people say having a variety of housing types is very important to them, and about one of three are satisfied with their current neighborhood housing mix.

Figure B19
Variety of Housing Types Importance

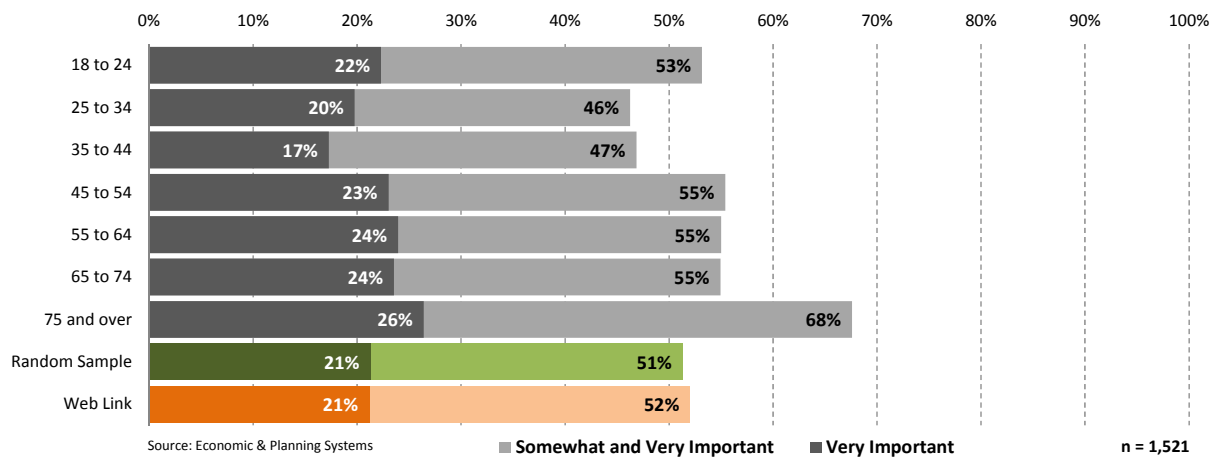
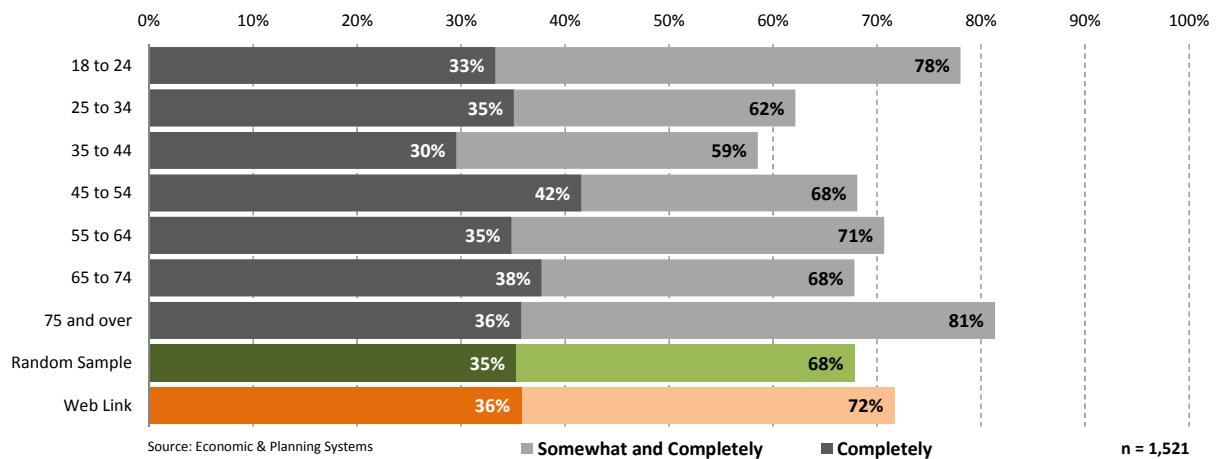


Figure B20
Variety of Housing Types Meeting Needs



Short Commute to Work

On average, households spend less than 30 minutes commuting every day. Short commute times are very important to working age people primarily, and are most important to the younger age cohorts. In fact, the younger age cohorts have longer commutes than older age cohorts. While 18 to 24 year-olds commute an average of 33 minutes per day, 55 to 64 year-olds spend just 23 minutes per day commuting. In general, 34 percent of people are satisfied with their commute times.

Figure B21
Short Commute to Work Importance

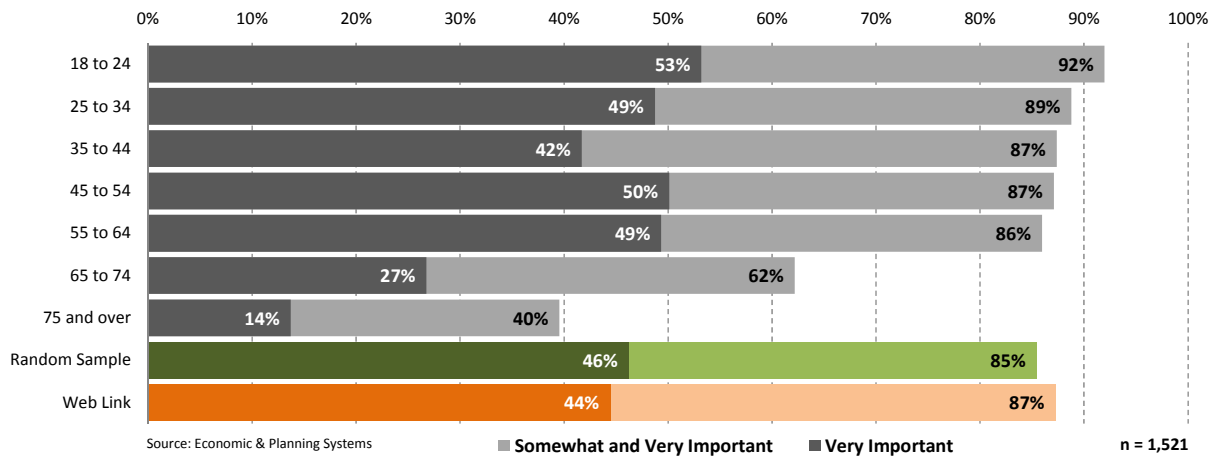
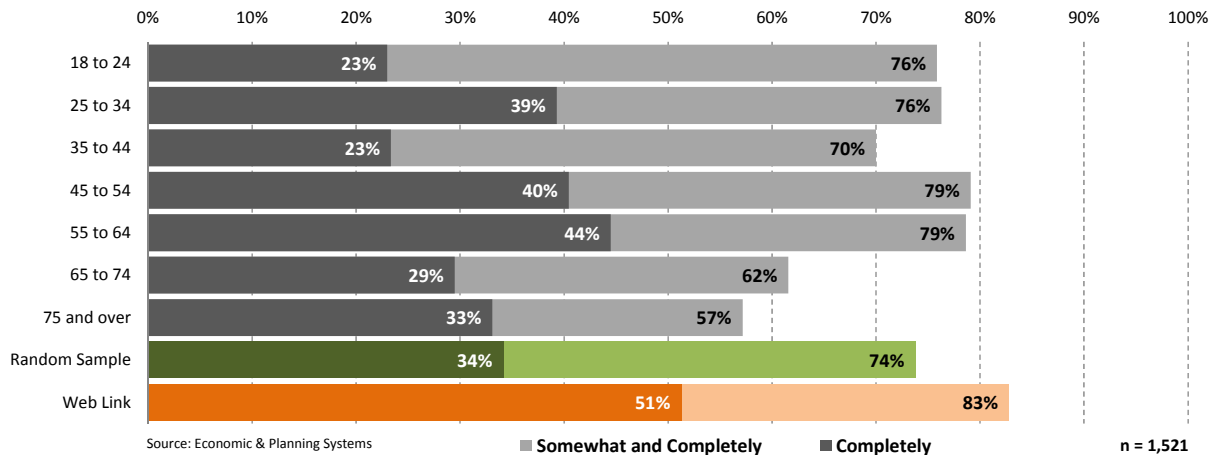
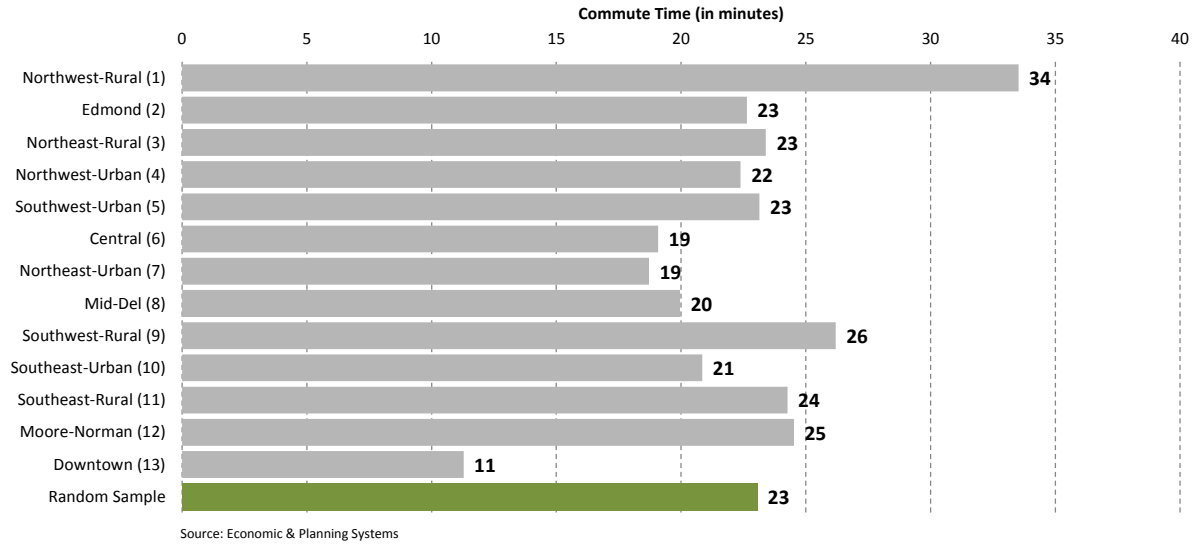


Figure B22
Short Commute to Work Meeting Needs



Commute times by Subarea are shown in the following Figure A23. The average commute time of households is 23 minutes. The commute time is longest (34 minutes) in Subarea 1 and shortest Downtown (11 minutes). Commute times are also generally shorter in the central parts of the city.

Figure B23
Commute to Work by Subarea



Close Proximity to Place of Worship

Among neighborhood characteristics, having close proximity to places of worship becomes increasingly important as one ages. In a similar pattern, people are more satisfied with this neighborhood attribute the older they get.

Figure B24
Close Proximity to Place of Worship Importance

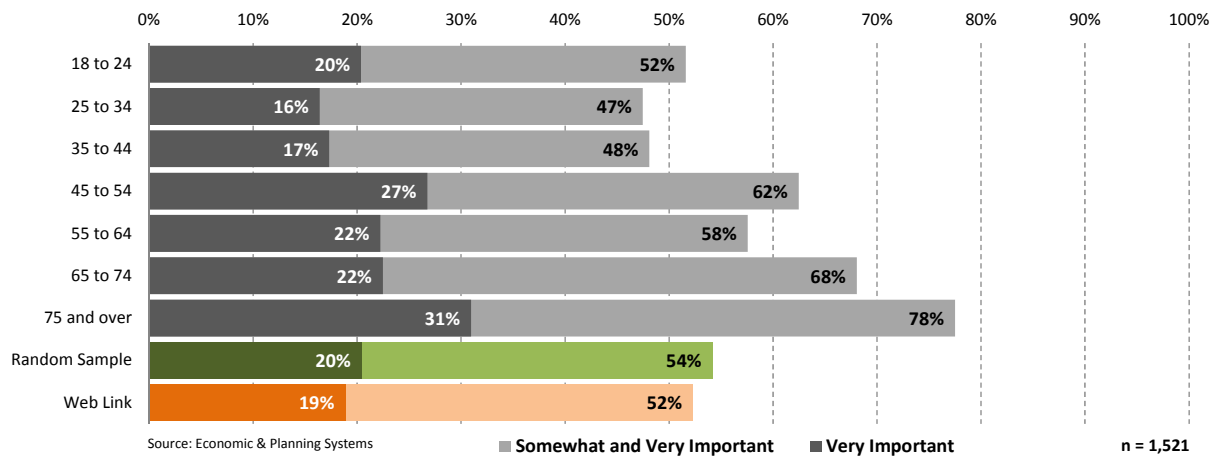
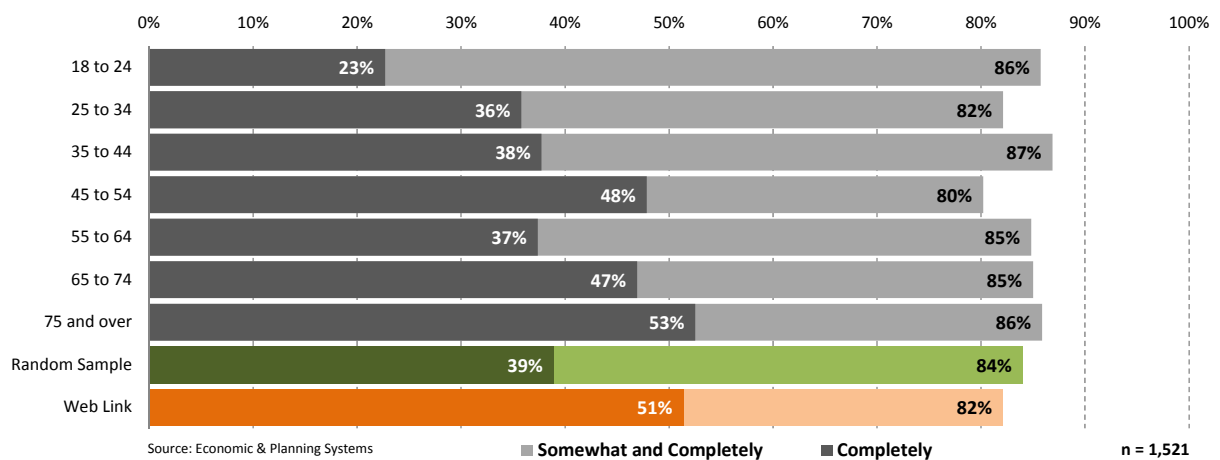


Figure B25
Close Proximity to Place of Worship Meeting Needs



Close Proximity to Parks, Trails, and Open Space

Being in close proximity to parks, trails, and open space has greater importance for younger age categories. In general, approximately two out of five people say this is very important to them. Satisfaction levels are similarly higher among younger age cohorts, indicating they may already be living in satisfactory proximity to these amenities.

Figure B26
Proximity to Parks/Trails/Open Space Importance

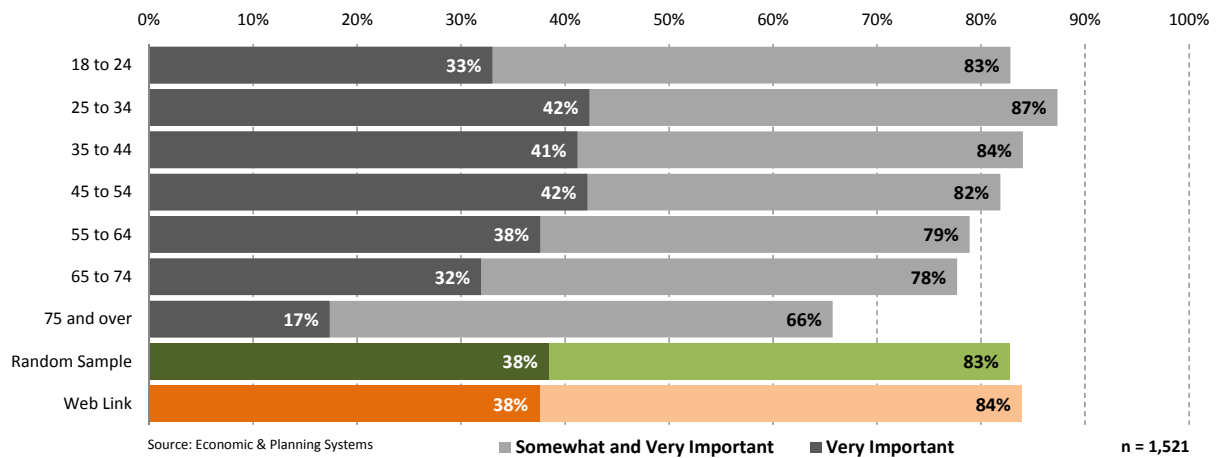
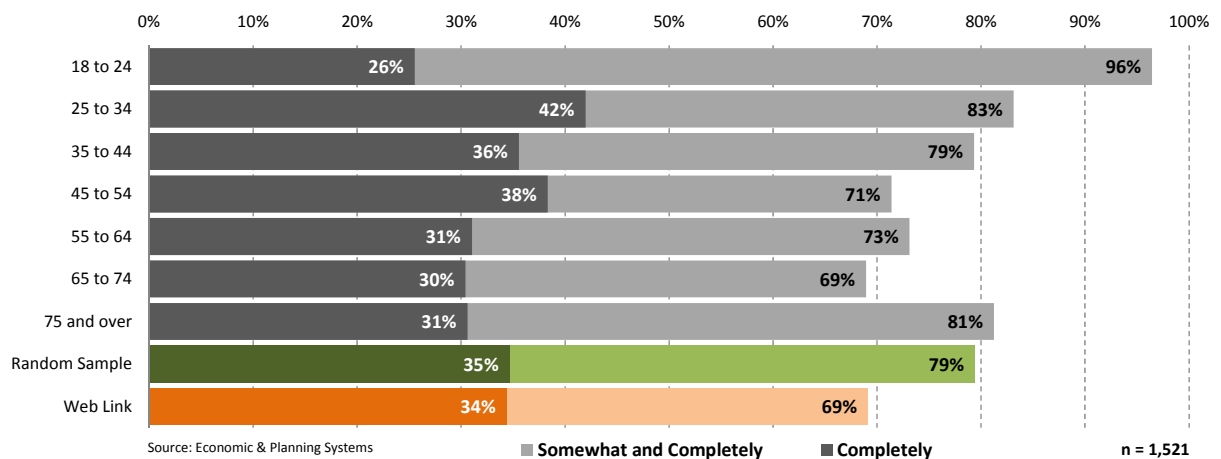


Figure B27
Proximity to Parks/Trails/Open Space Meeting Needs



Close Proximity to Schools, Shops, and Entertainment

The importance of being in close proximity to schools, shops, and entertainment correlates linearly with age. Older age cohorts do not find it as important as younger ages do – e.g. nearly half of 18 to 24 year-olds said it was very important, but only one quarter of those 75 and older indicated so. Interestingly, younger age cohorts also indicated their satisfaction with their current proximity to schools, shops, and entertainment, whereas the older age cohorts indicated lower satisfaction levels.

Figure B28
Proximity to Schools/Shops/Entertainment Importance

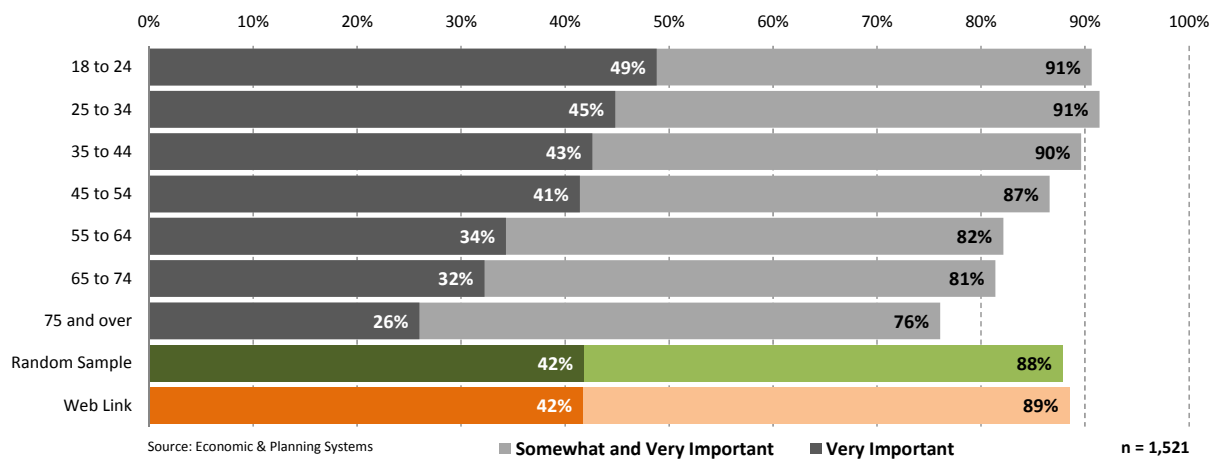
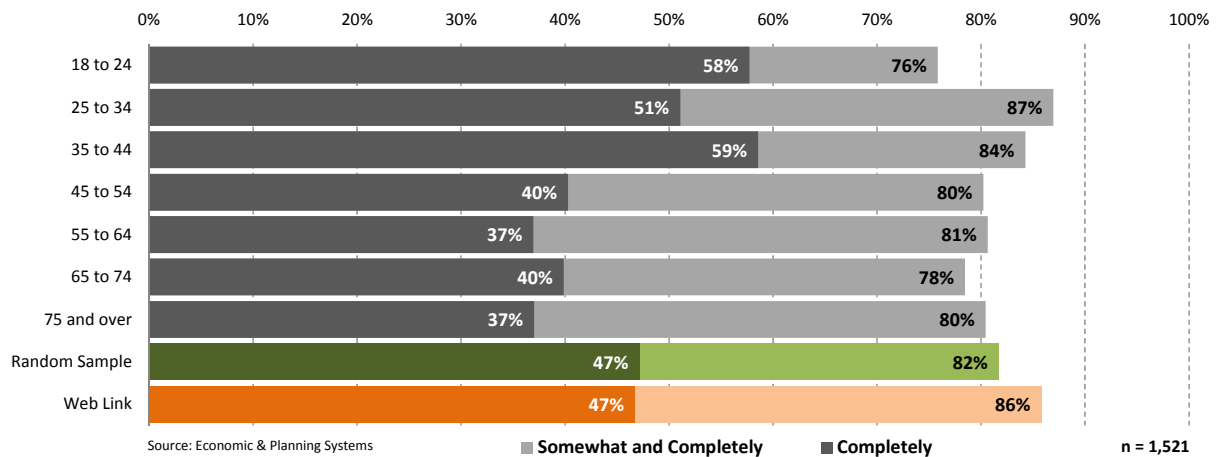


Figure B29
Proximity to Schools/Shops/Entertainment Meeting Needs



Close Proximity to Train, Streetcar, or Bus

Overall, this part of the community survey mainly captured perspectives of importance and satisfaction for existing bus transit service. Approximately one in five people indicated it is very important to live in proximity to transportation options. Satisfaction levels were similarly low.

Figure B30
Proximity to Train/Streetcar/Bus Importance

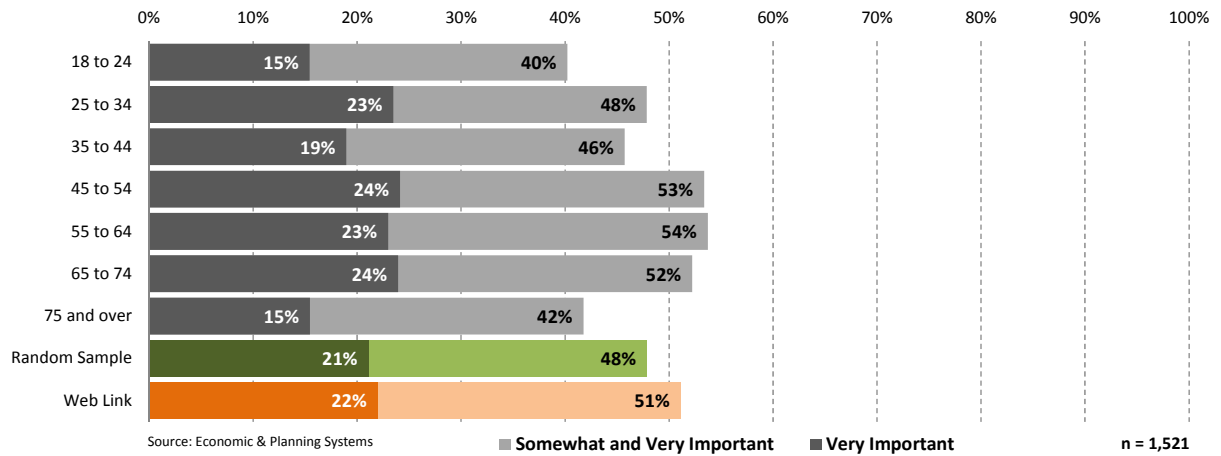
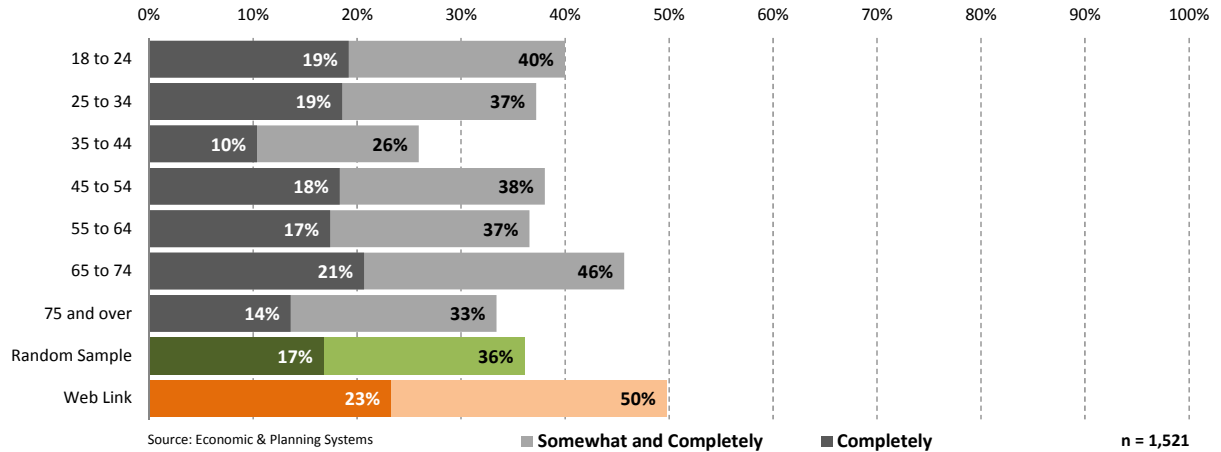


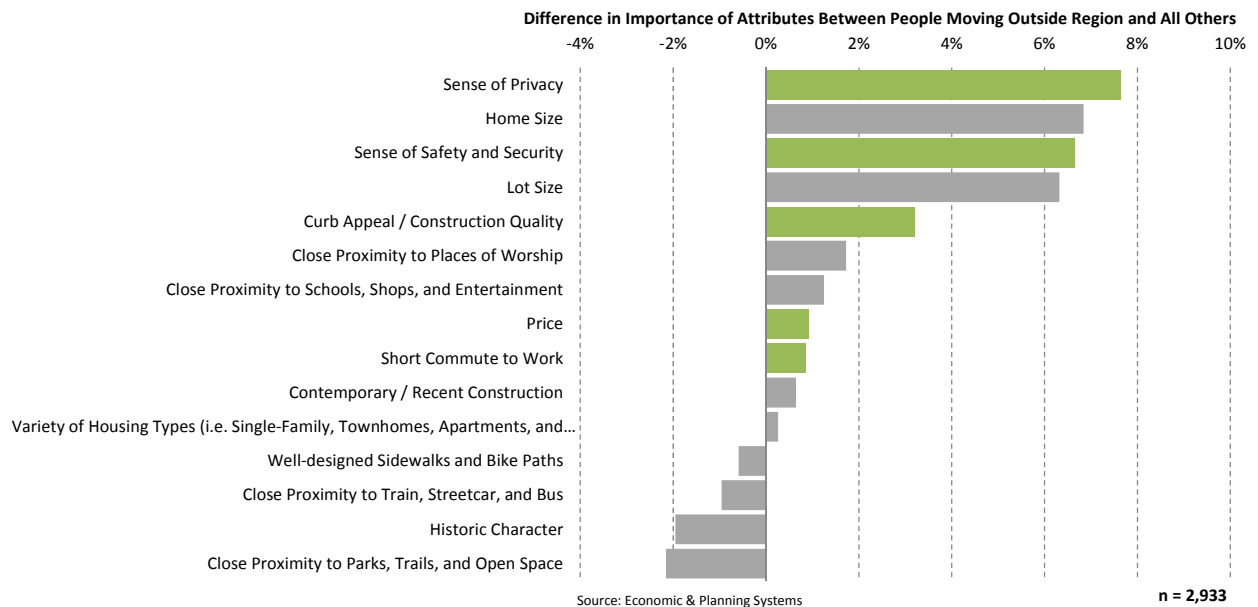
Figure B31
Proximity to Train/Streetcar/Bus Meeting Needs



Difference in Level of Importance

The following charts illustrate the actual percentage differences between households who say they are very likely to stay in the city and those who say they are very likely to leave. For example, of the households that indicated they are very likely to leave the city, 57 percent say that sense of privacy is very important, compared to 49 percent of the households who indicated they are staying. Interestingly, there are four considerations that are notably different: sense of privacy, home size, sense of safety and security, and lot size. Overall, these charts illustrate a general difference between the two groups of population.

Figure B32
Differences in Level of Importance



As there are differences in levels of satisfaction by age group, there are notable differences in considerations of importance between age groups. These differences illuminate how different age groups place priority on various housing, neighborhood, and community characteristics, and they begin to identify where the housing market may go in the future.

For 18 to 24 year-olds, proximity to schools, shops, and entertainment beats out curb appeal and well-designed sidewalks and bike paths. Sense of safety and security, sense of privacy, and a short commute to work, are all important to generally the same order of magnitude as the overall population.

Figure B33
Importance of Various Characteristics, 18 to 24

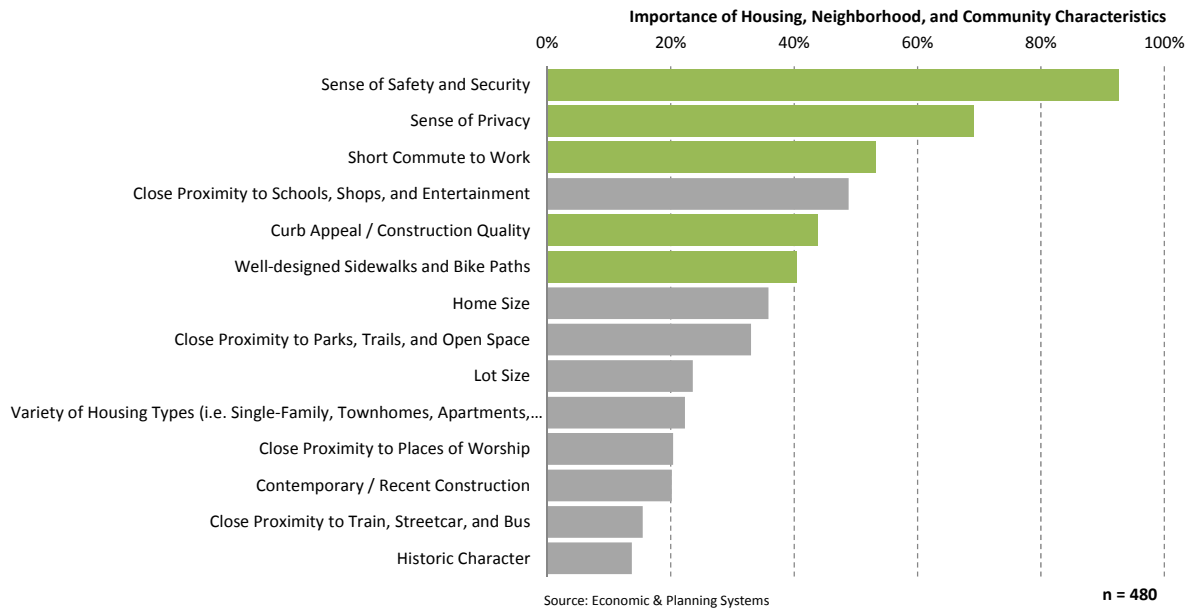
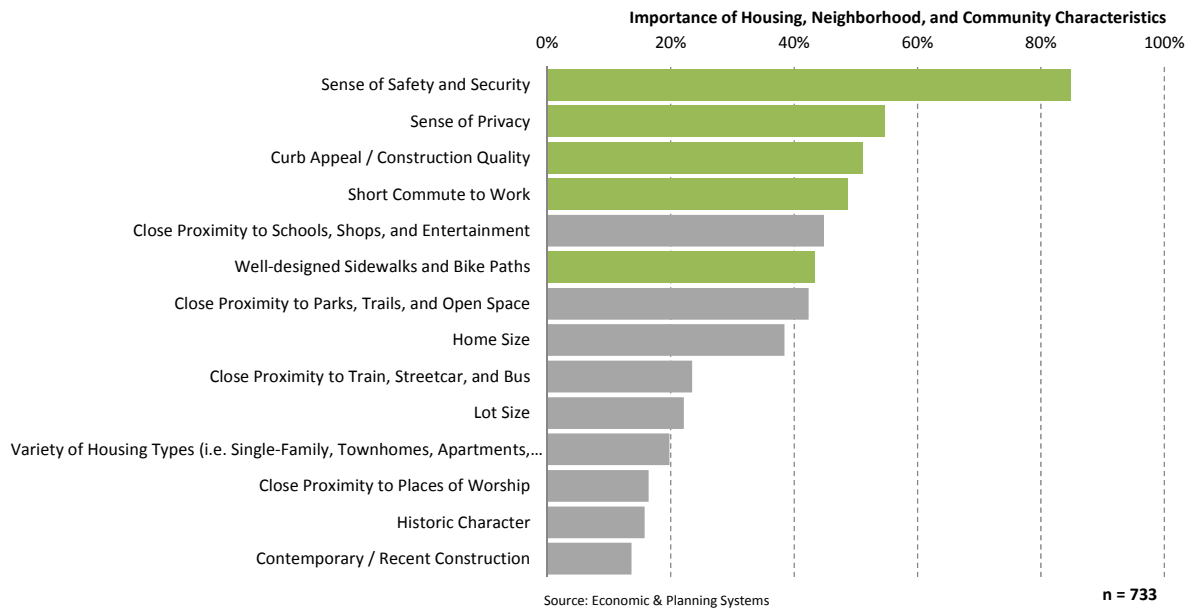
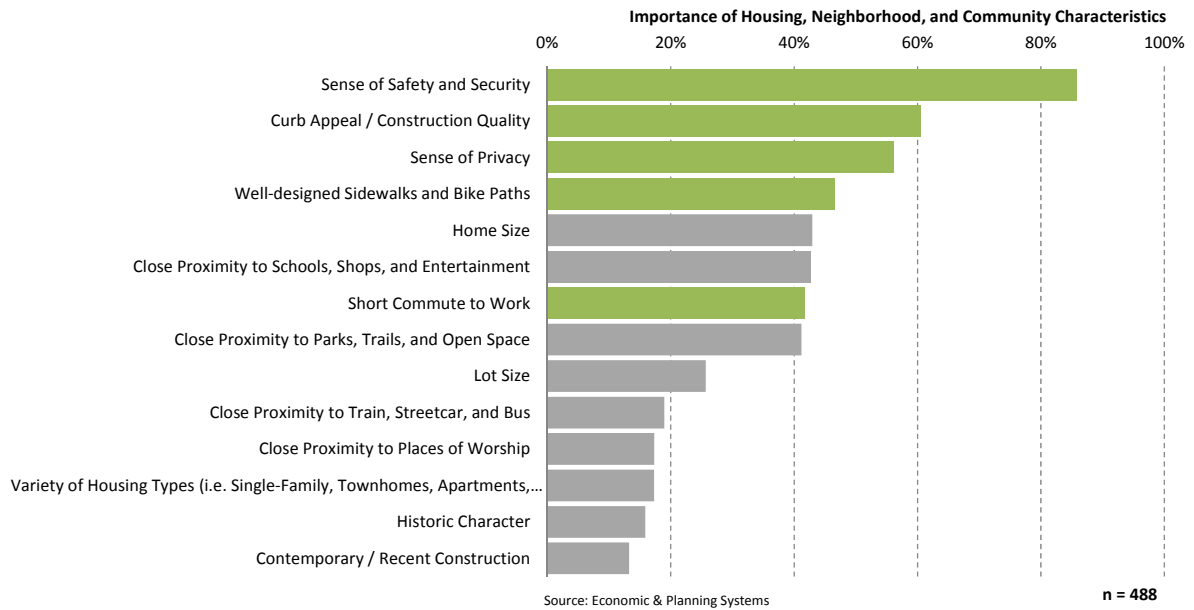


Figure B34
Importance of Various Characteristics, 25 to 34



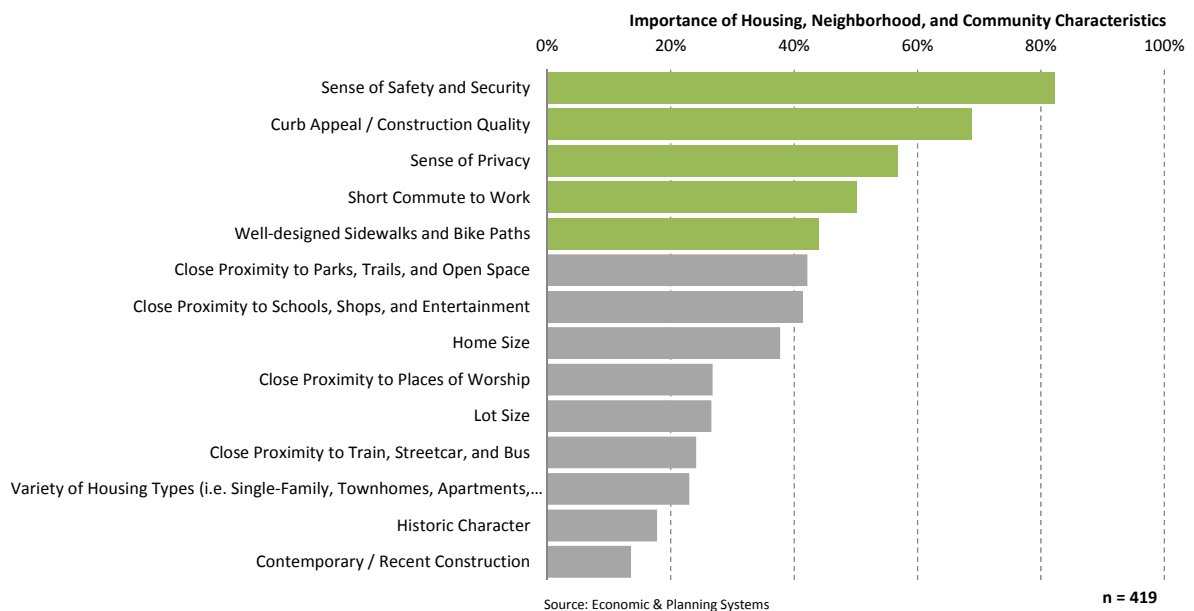
Among 35 to 44 year-olds, home size as well as proximity to schools, shops, and entertainment are very important. Having a short commute to work is also lower on the list than for most people.

Figure B35
Importance of Various Characteristics, 35 to 44



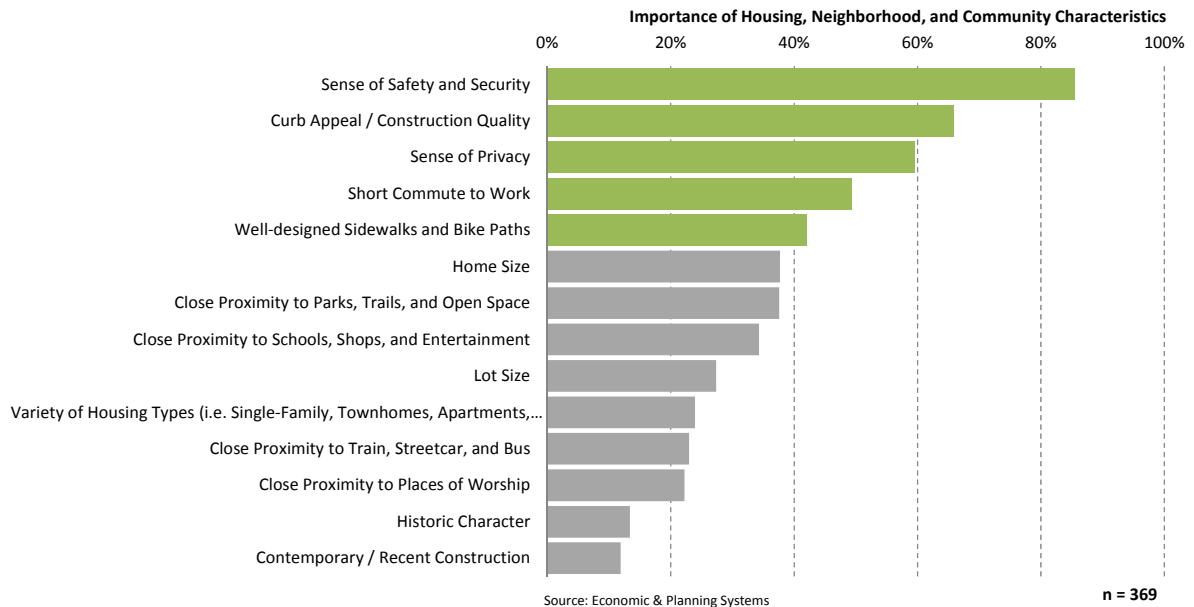
For the top five considerations, the list of most important characteristics to 45 to 54 year-olds mirrors the overall distribution. Different, however, is that proximity to parks, trails, and open space, as well as proximity to schools, shops, and restaurants are higher on their list than for the overall population.

Figure B36
Importance of Various Characteristics, 45 to 54



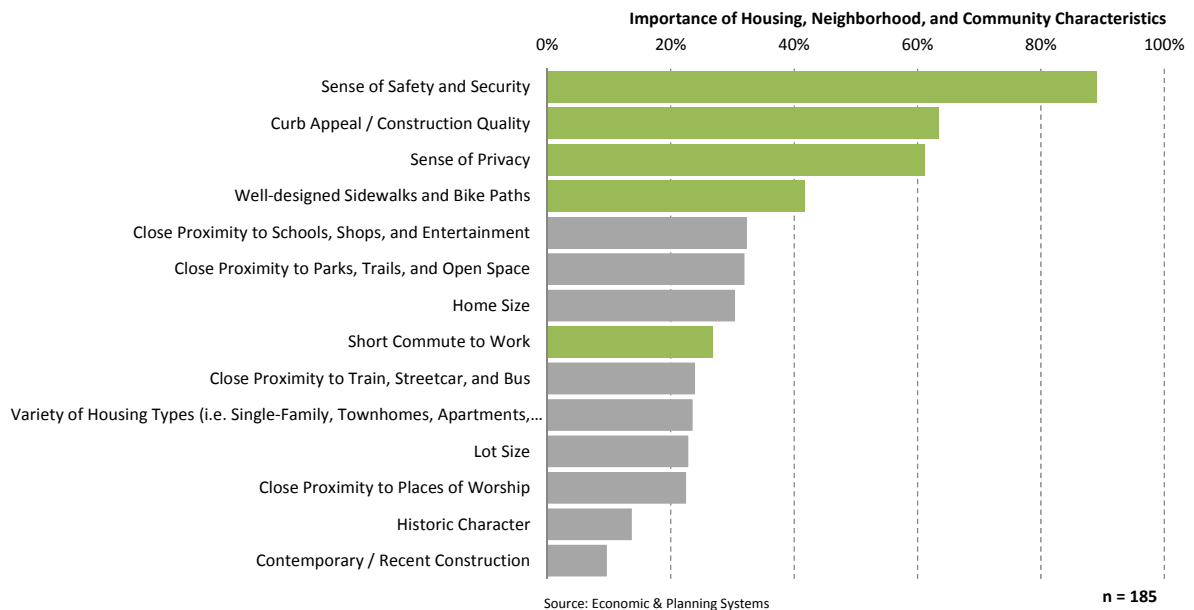
The list of important characteristics for the 55 to 64 year-olds is nearly identical to the City's overall distribution. Though this is not the largest age cohort of survey-takers, their preferences are most reflective of the City as a whole.

Figure B37
Importance of Various Characteristics, 55 to 64



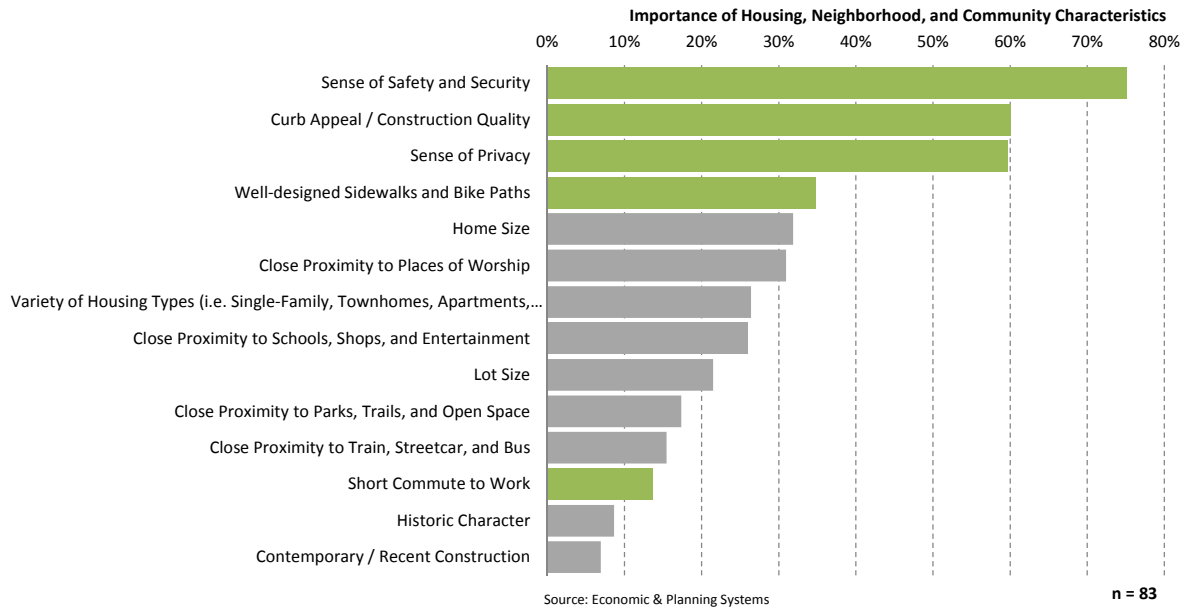
For 65 to 74 year-olds, it is anticipated that a short commute to work is less important, because they're predominantly retirement age. Unique for this age group, though, is that they value curb appeal and construction quality higher than sense of privacy.

Figure B38
Importance of Various Characteristics, 65 to 74



The 75 and older age cohort is similar to its younger cohort in that a short commute to work is even less important. Advancing on their list and reflective of people's changing priorities are considerations like proximity to place of worship and variety of housing types, which are both much lower on each of the preceding age group's list of important considerations.

Figure B39
Importance of Various Characteristics, 75 and older



Importance and Satisfaction by Subarea

The following charts illustrate the importance of features at the Subarea level.

Size of Home

Households living in Subareas 4, 5, 10, and 11 place greater importance on home size in comparison to other Subareas. On the other hand, results from more central Subareas (6, 7, and 13) show that households value home size less. Overall, households are generally satisfied with the size of their homes, even in Subareas where it appears there is little importance placed on it (e.g. Subarea 13).

Figure B40
Home Size Importance

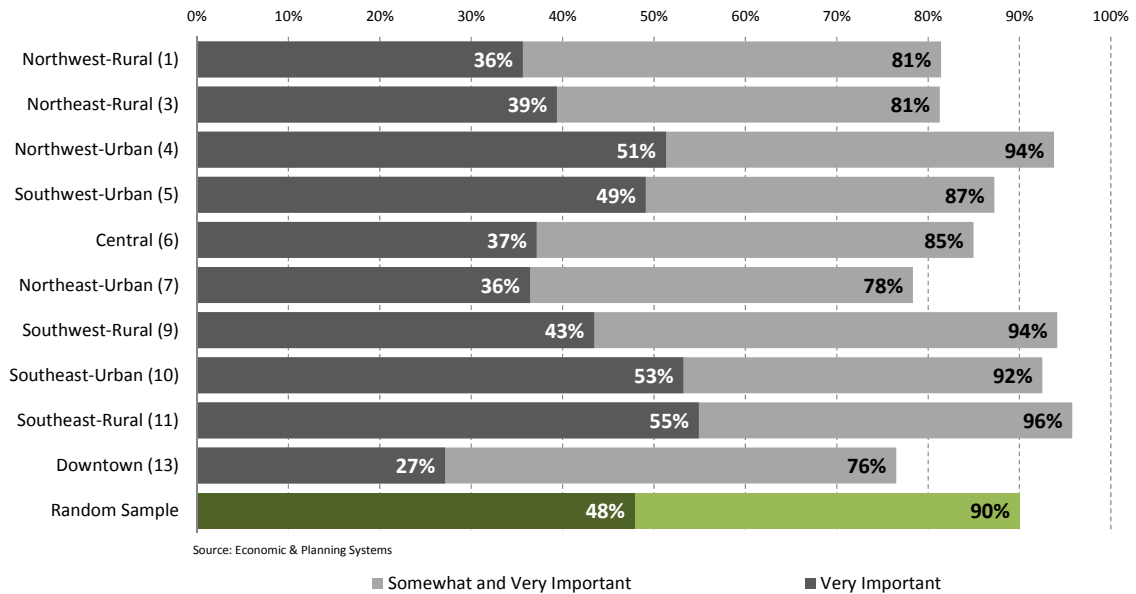
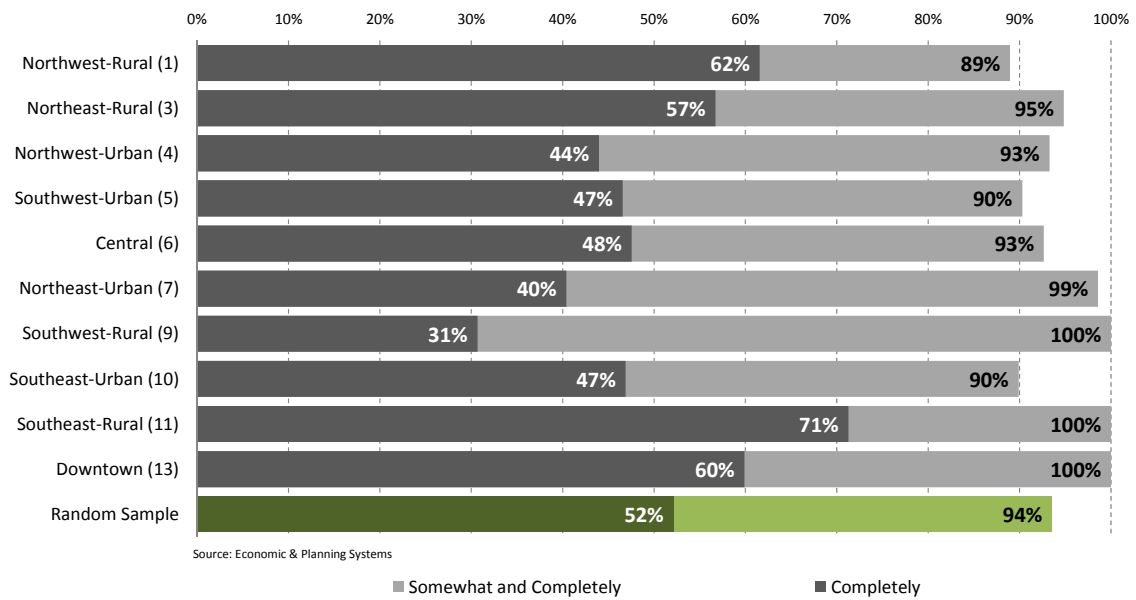


Figure B41
Home Size Meeting Needs



Size of Lot

Lot size seems to be of highest importance to households in the rural Subareas 9 and 11 and least important to households in the more central Subareas 6, 7, and 13, as with the results on home size. Satisfaction is generally high except for Subarea 13.

Figure B42
Lot Size Importance

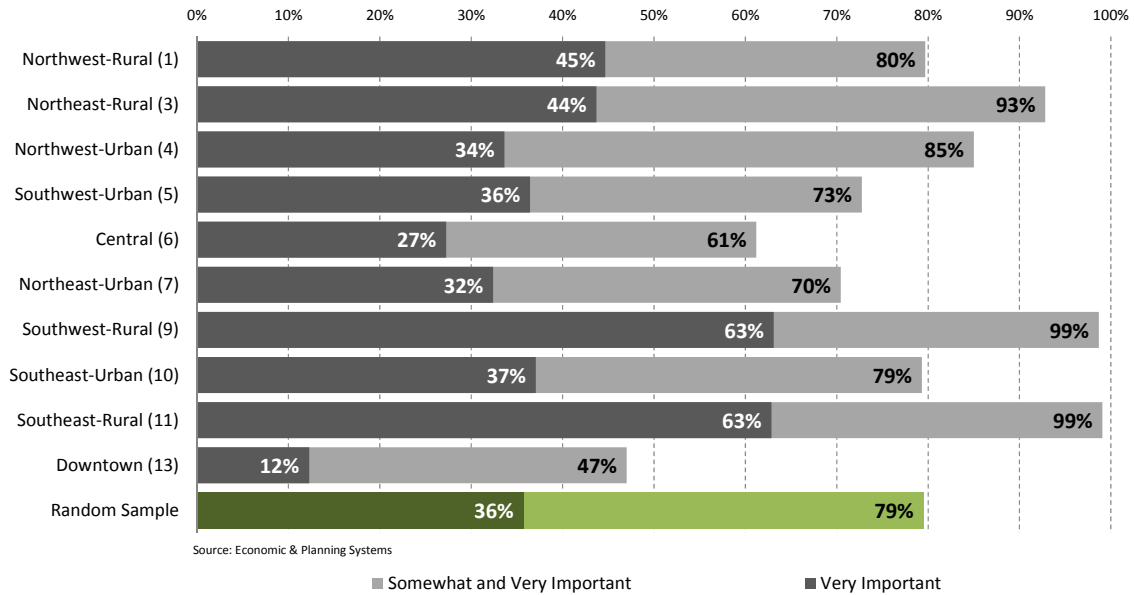
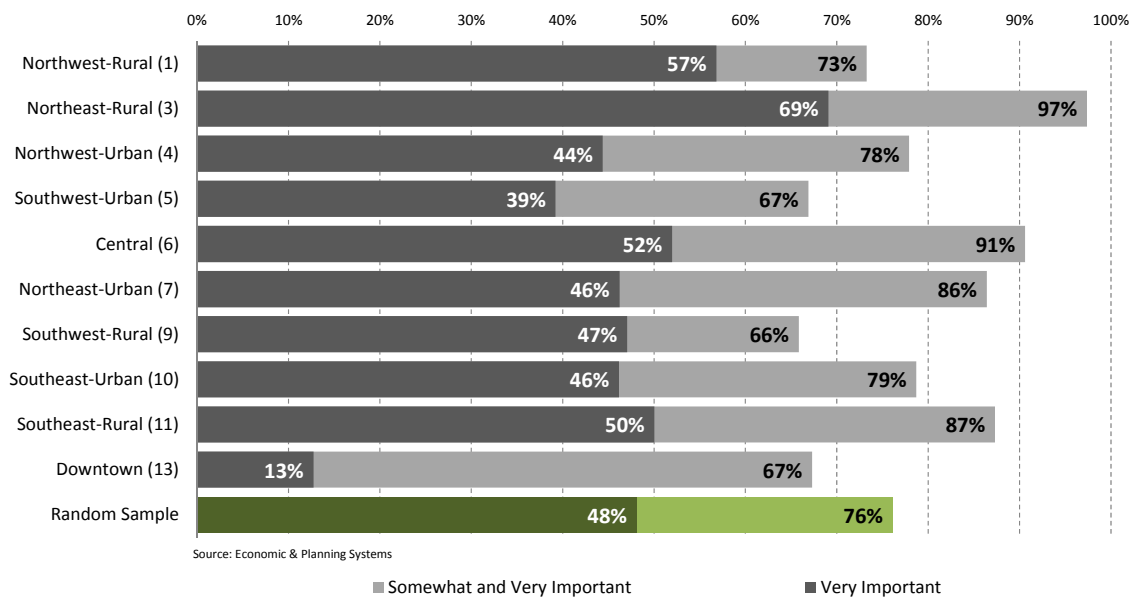


Figure B43
Lot Size Meeting Needs



Contemporary/Recent Construction

Households in Subareas 4, 6, and 11 seem to value contemporary and recent construction higher than households in other Subareas. Households in Subarea 4 and 6, however, have low satisfaction levels, but Subarea 11 has relatively high levels of satisfaction. In particular, it appears that households in the more rural Subareas have higher satisfaction with this issue than do households in other areas, most likely because these are the areas that have experienced much of the recent development.

Figure B44
Contemporary/Recent Construction Importance

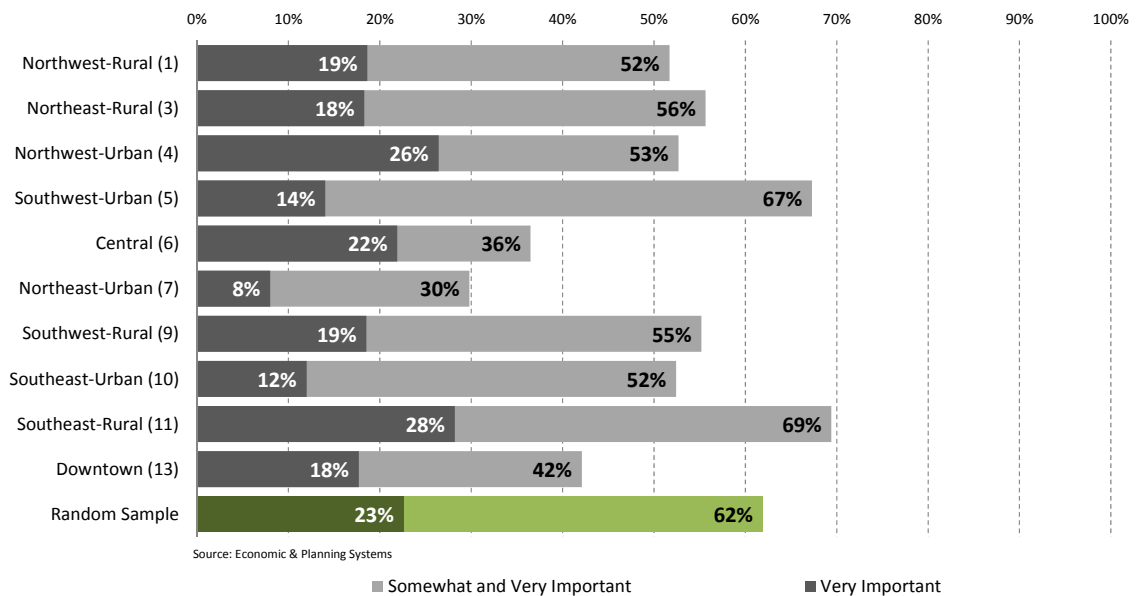
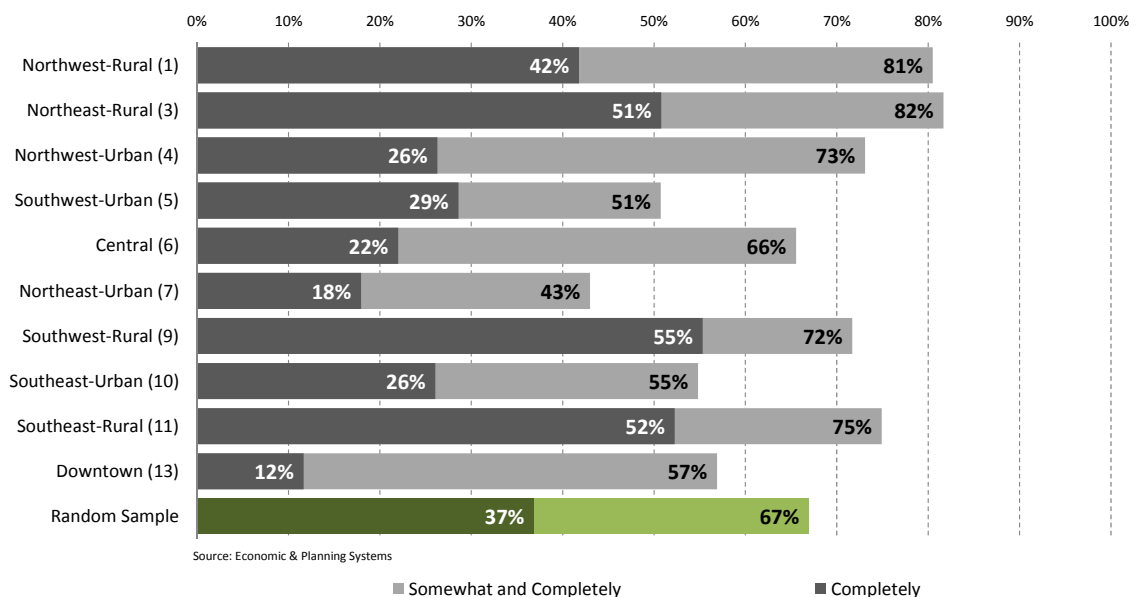


Figure B45
Contemporary/Recent Construction Meeting Needs



Price

Price is one of the more important characteristics of one's home, neighborhood, and community. It appears least important in Subarea 7, which seems to have average levels of satisfaction. Households in suburban and rural locations seem most satisfied, however.

Figure B46
Price Importance

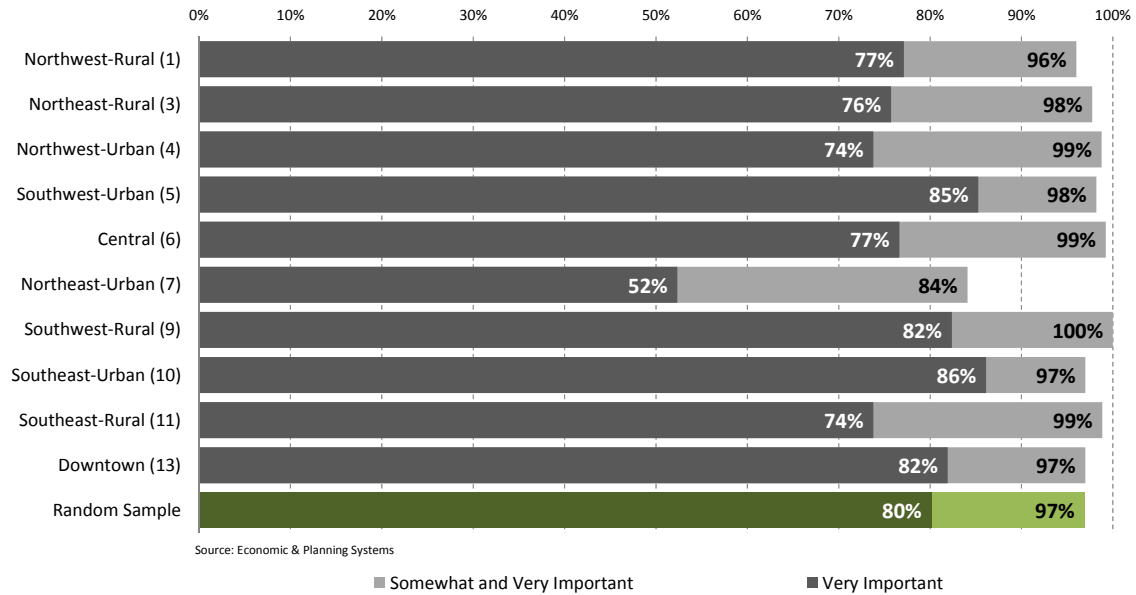
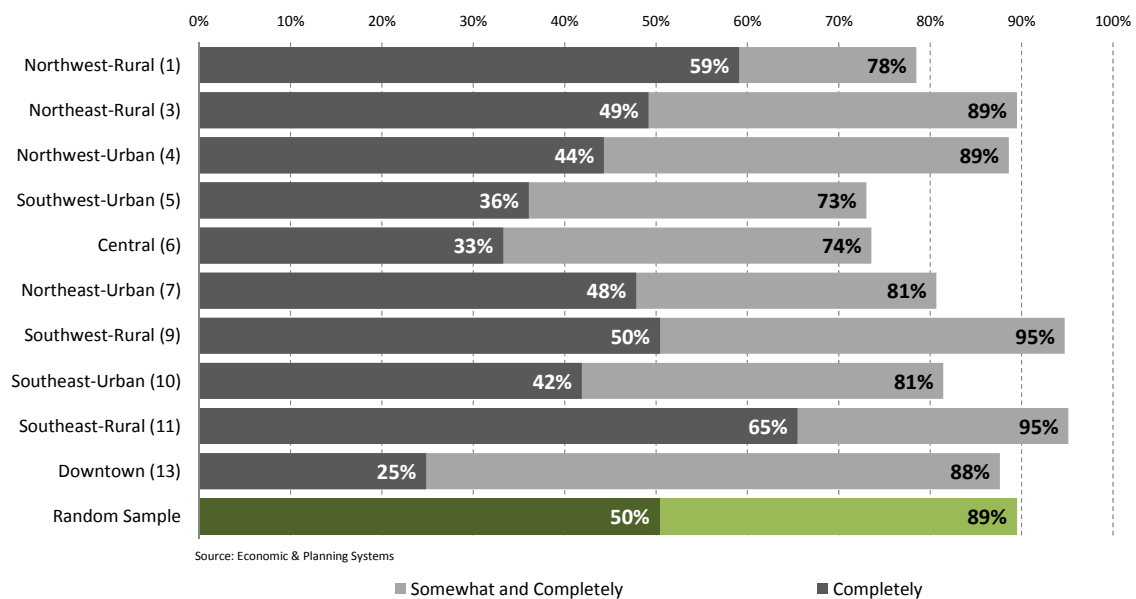


Figure B47
Price Meeting Needs



Curb Appeal/Construction Quality

The responses to this question cross-tabulated by Subarea are perhaps most revealing of a great community-wide deficiency. Curb appeal and construction quality are very important to nearly 60 percent of households, increasing to 75 and approximately 80 percent in Subareas 9 and 1, respectively. On the other hand, satisfaction levels appear to be comparatively low.

Figure B48
Curb Appeal/Construction Quality Importance

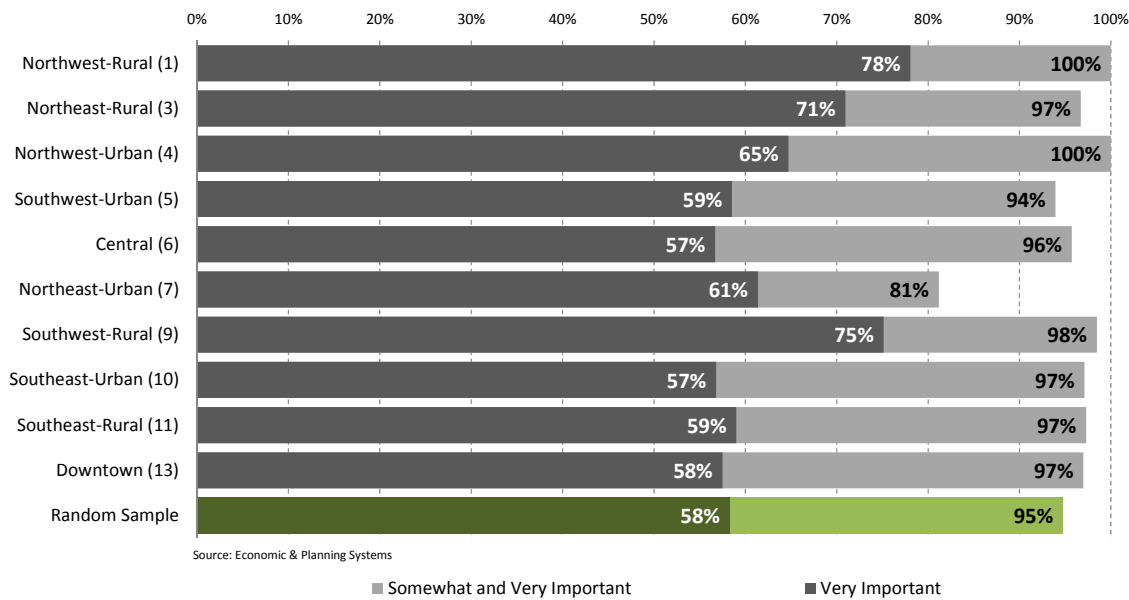
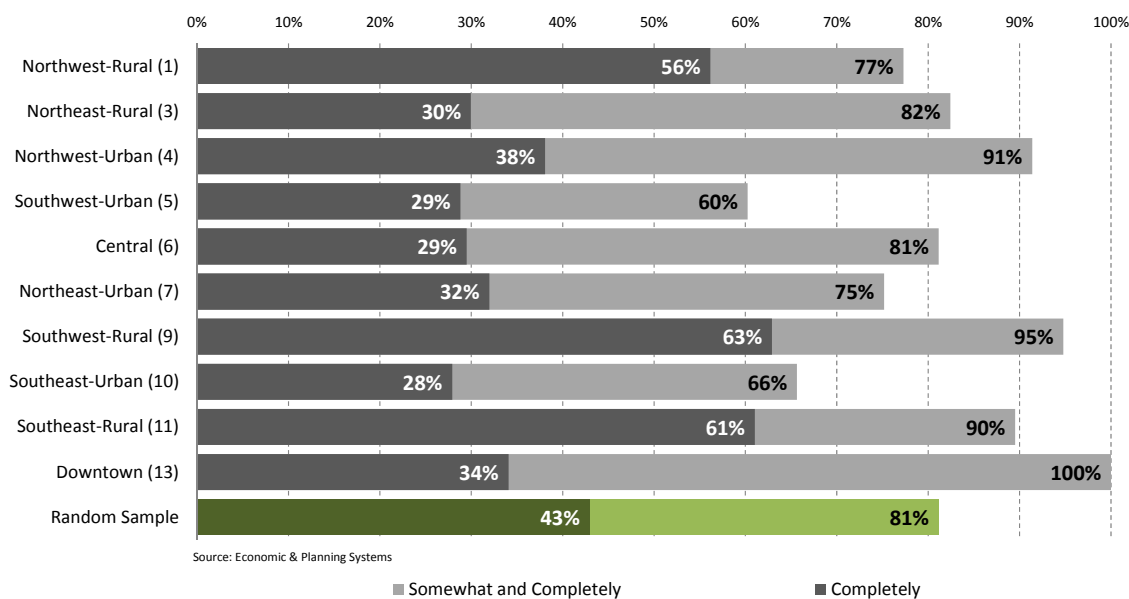


Figure B49
Curb Appeal/Construction Quality Meeting Needs



Historic Character

Households in the more central Subareas appear to consider this issue more important than households in other non-urban Subareas. Their satisfaction is similarly high, because Subareas 6, 7, and 13 are the more historic parts of the city.

Figure B50
Historic Character Importance

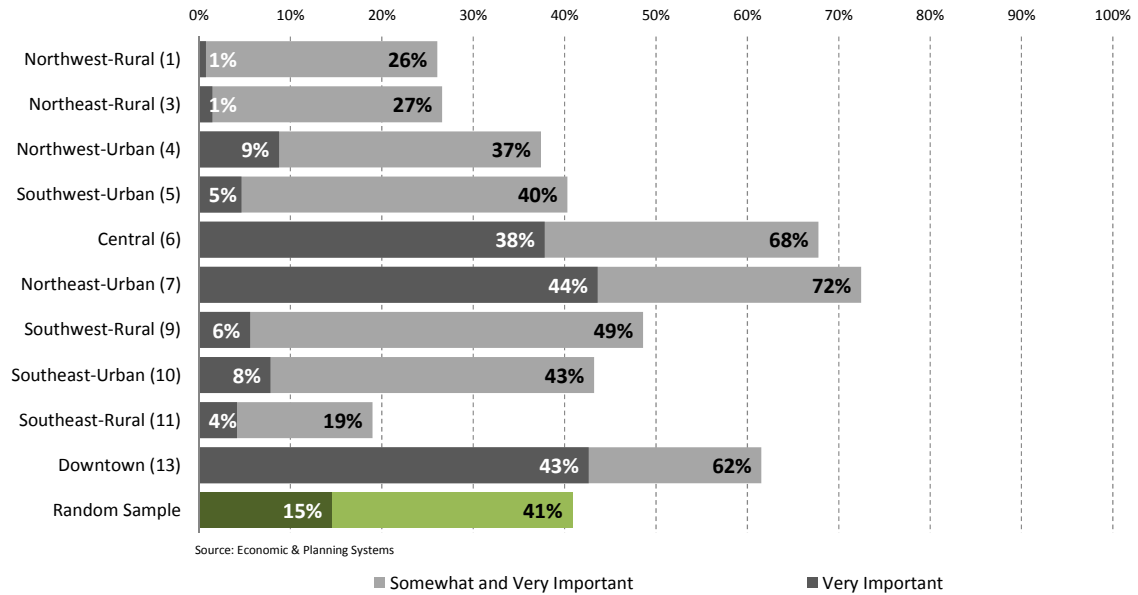
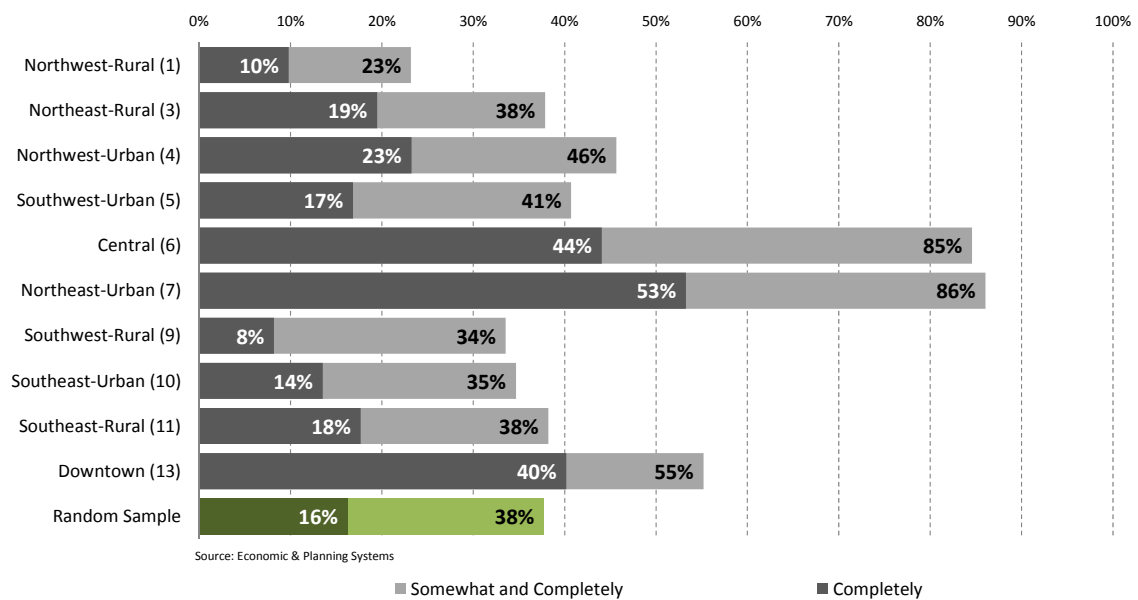


Figure B51
Historic Character Meeting Needs



Well-Designed Sidewalks and Bike Paths

Overall, sidewalks are very important to approximately 40 percent of households but only 25 percent of them are completely satisfied with them. Sixty percent of Subarea 7, for example, ranks this as very important, but only 7 percent are completely satisfied. On the opposite end of the spectrum, households in Subarea 9 don't rank sidewalks nearly as important, but their satisfaction level is the highest.

Figure B52
Well-Designed Sidewalks/Bike Paths Importance

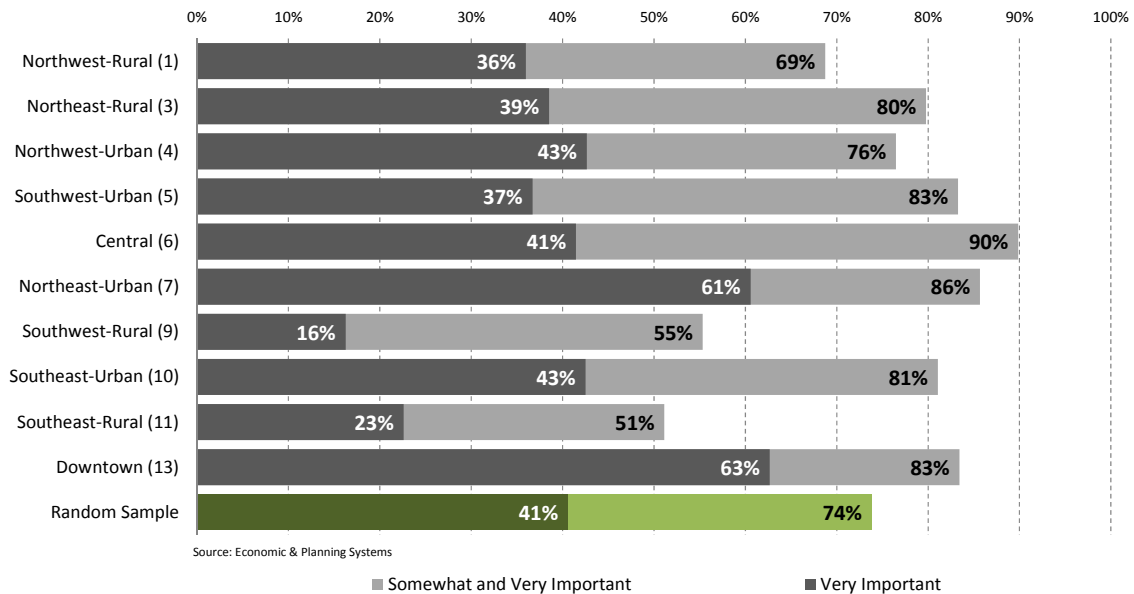
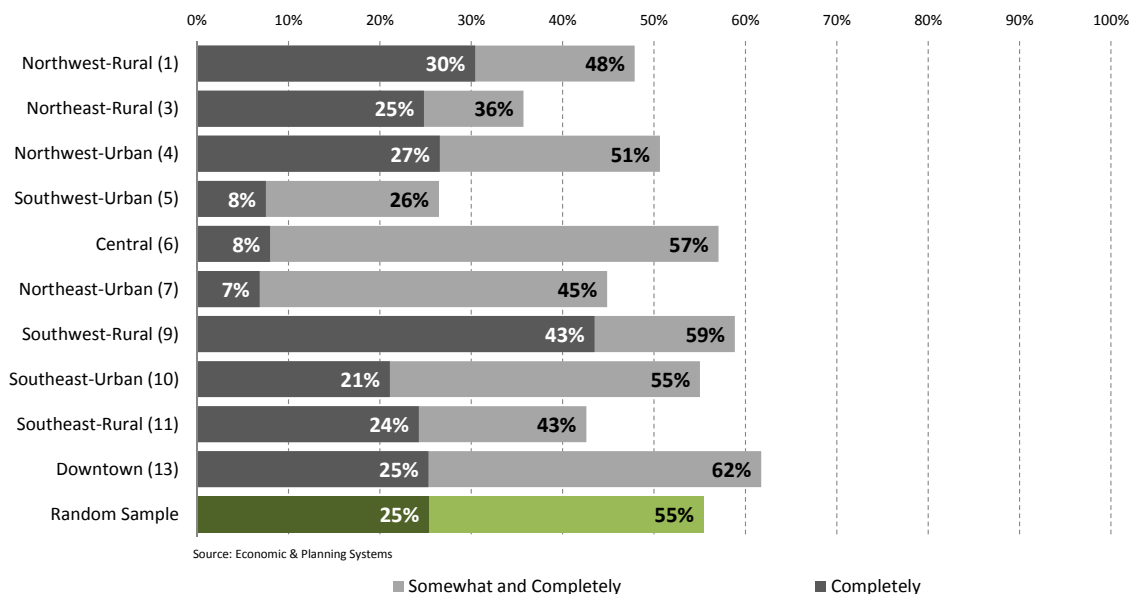


Figure B53
Well-Designed Sidewalks/Bike Paths Meeting Needs



Sense of Privacy

Sense of privacy is among households' top concerns. Interestingly, there seems to be a correlation between the degree to which a Subarea is urbanized and how importantly it views sense of privacy. Households in the more urban Subareas (particularly 6 and 13) appear to see sense of privacy as less important than households in more suburban and rural Subareas. Satisfaction levels are highest in two of the more rural Subareas (3 and 11).

Figure B54
Sense of Privacy Importance

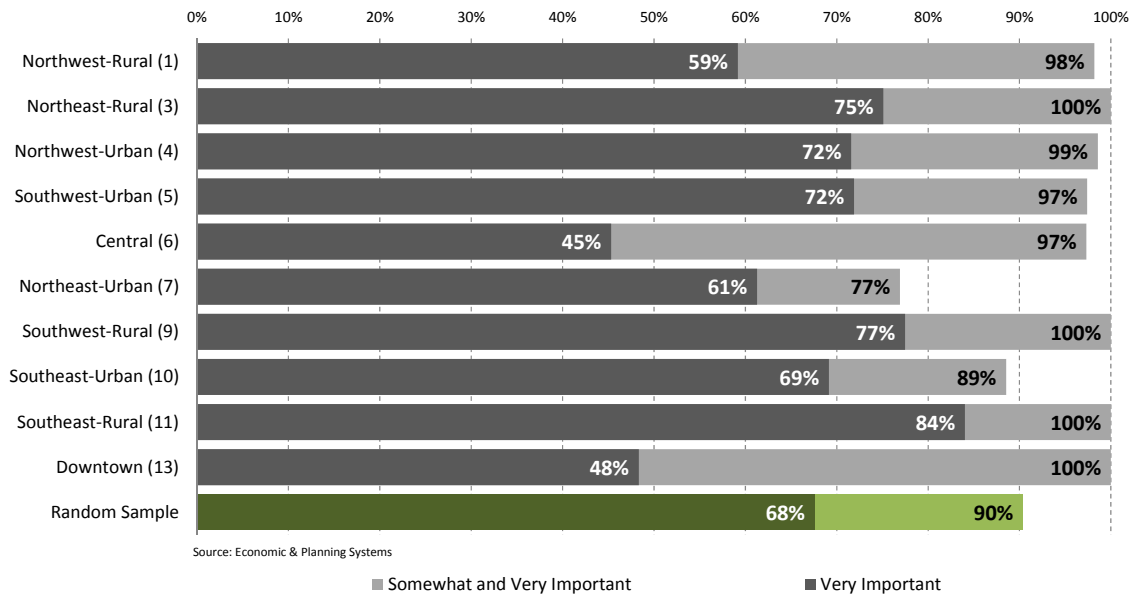
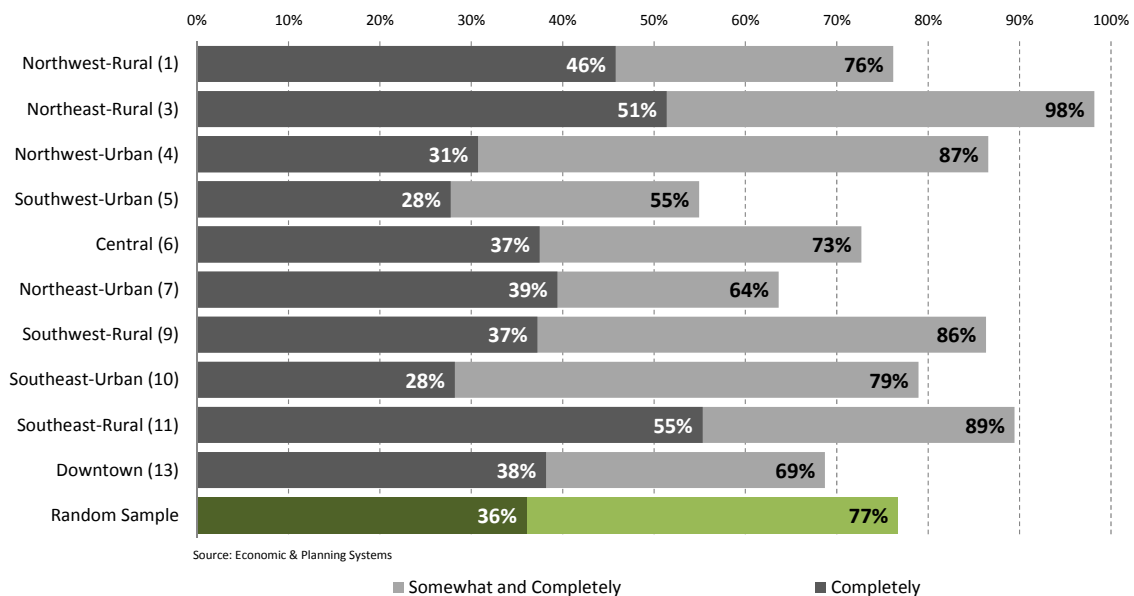


Figure B55
Sense of Privacy Meeting Needs



Sense of Safety and Security

Households view sense of safety and security as a top concern. Households in Subarea 9 ranked this higher than the other Subareas, and they also seemed to have the highest level of satisfaction. Lower levels of perceived safety and security are not necessarily found in more urban Subareas. That is, Subarea 5 had the lowest level of satisfaction, followed by Subarea 10.

Figure B56
Sense of Safety/Security Importance

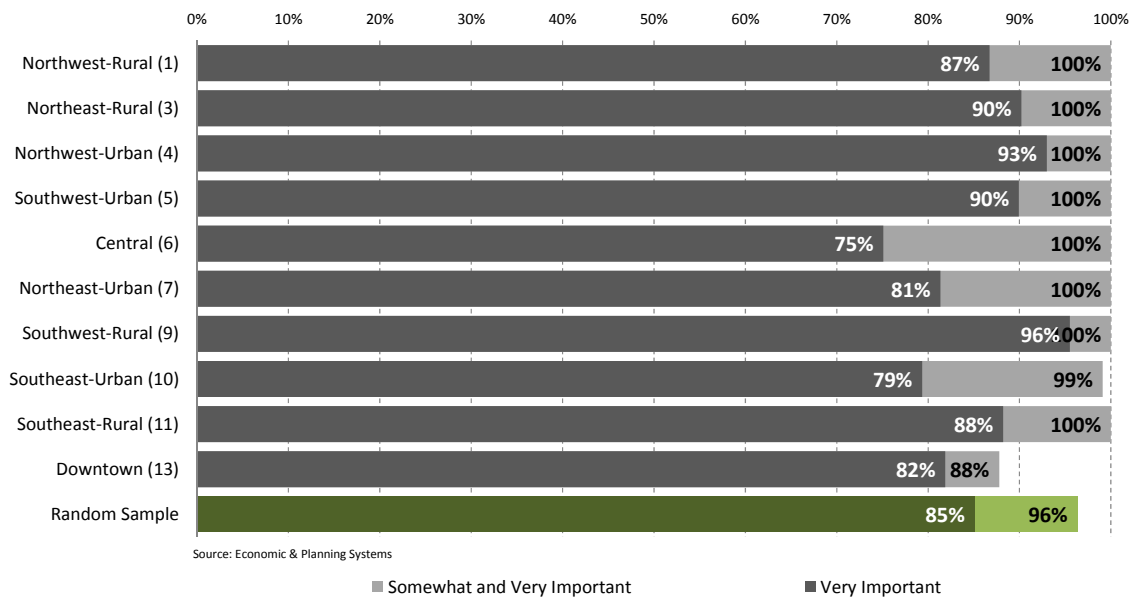
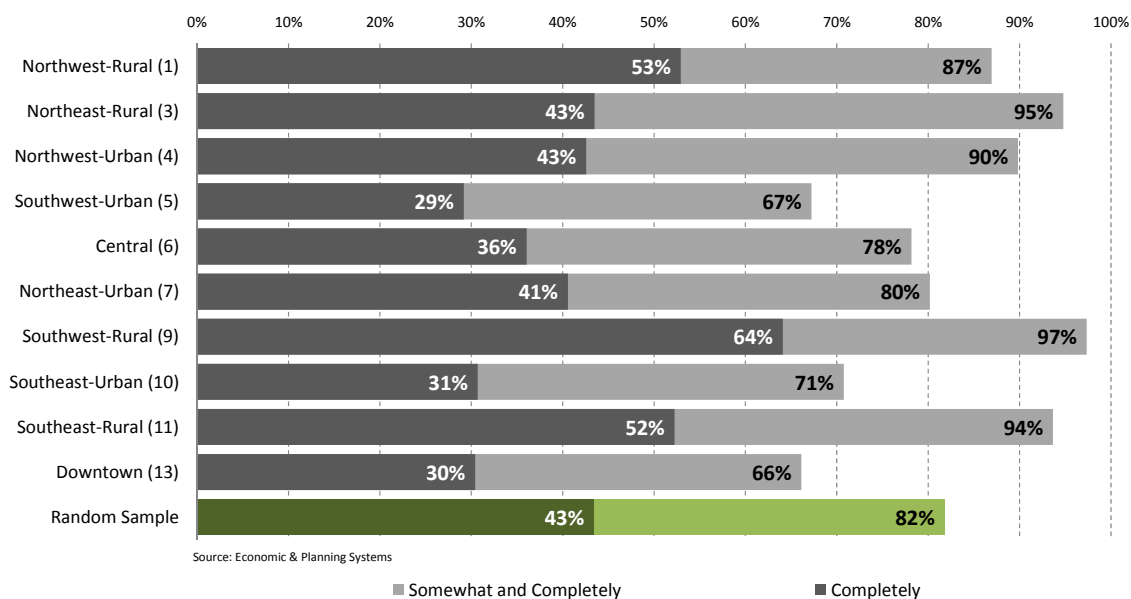


Figure B57
Sense of Safety/Security Meeting Needs



Variety of Housing Types

Variety of housing is very important to approximately 25 percent of households, and the existing mixes seem to be satisfying households to only a slightly greater degree on average. Households in Subareas 6, 10, and 13 seem to rate variety of housing as more important than households in other Subareas. Households in these same Subareas tended to have relatively low satisfaction levels, as well. In the more rural Subareas (1, 3, 9, and 11), variety of housing types was not only relatively less important, but there seemed to be generally high satisfaction in the lack of housing type diversity.

Figure B58
Variety of Housing Types Importance

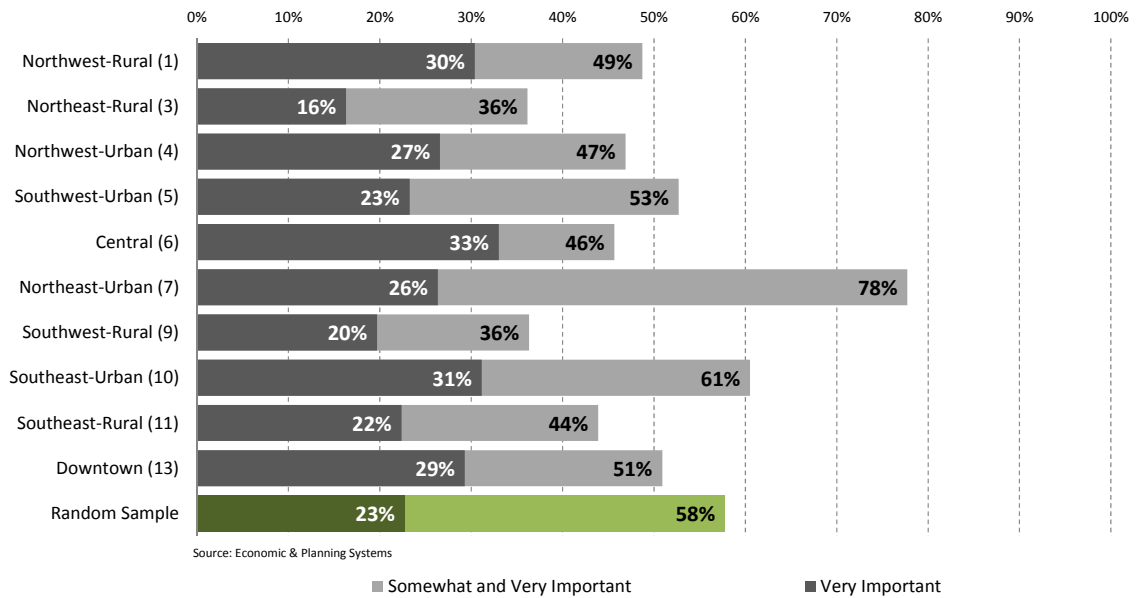
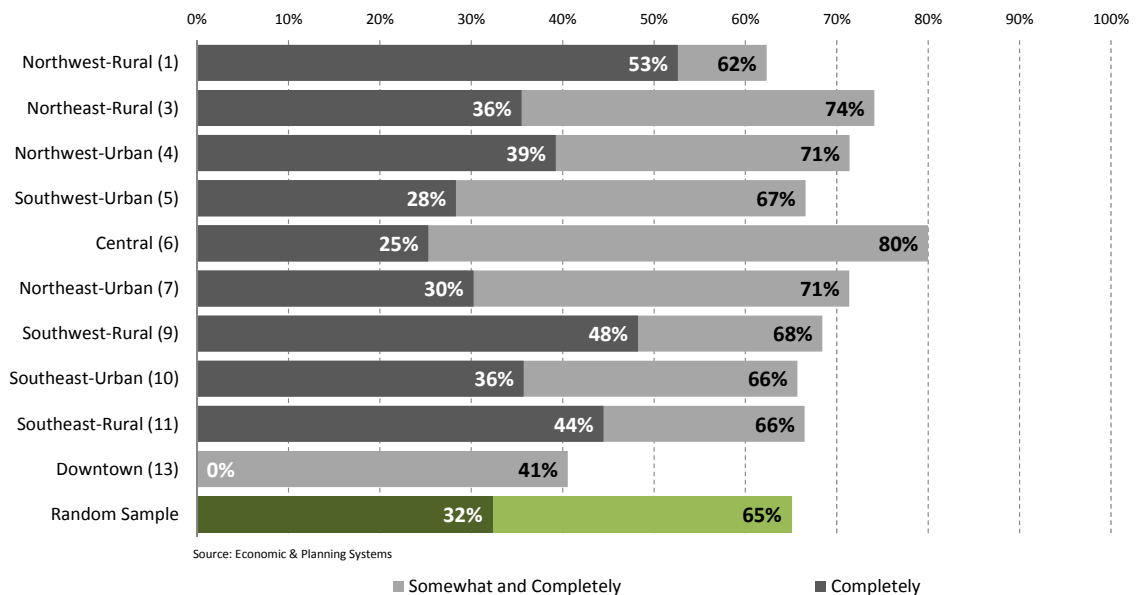


Figure B59
Variety of Housing Types Meeting Needs



Short Commute to Work

Households in the most central Subareas (6 and 13) seem to view a short commute to work as more important than households in other Subareas. Households living downtown are overwhelmingly satisfied with their commuting conditions, whereas households in Subarea 6 are somewhat less satisfied. Households in the more suburban and rural Subareas tended to think of a short commute time as less important, but are still not predominantly satisfied with that condition.

Figure B60
Short Commute to Work Importance

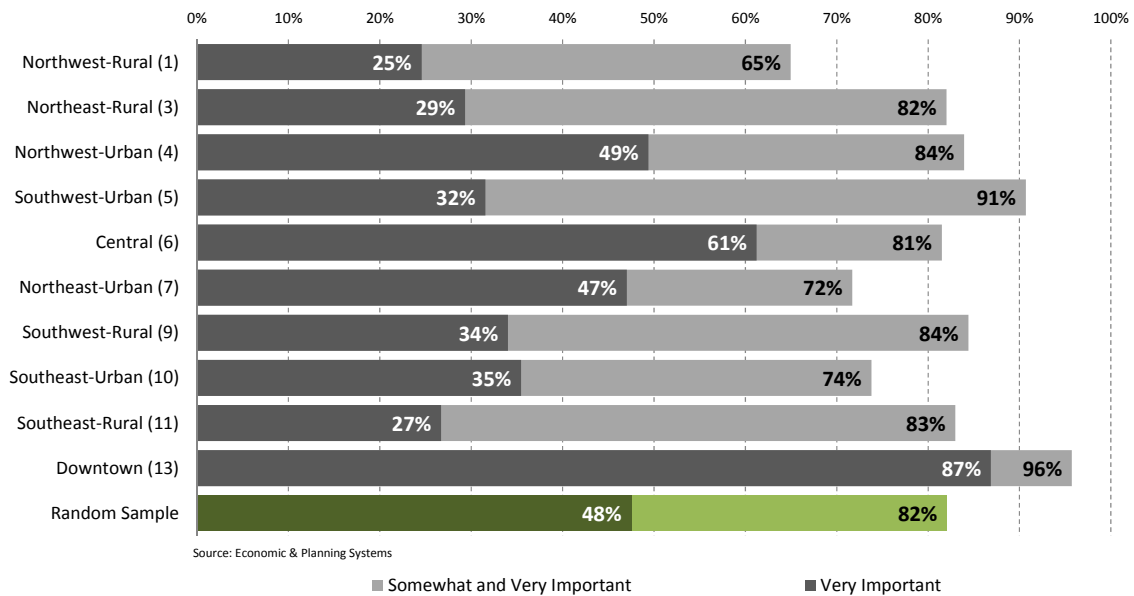
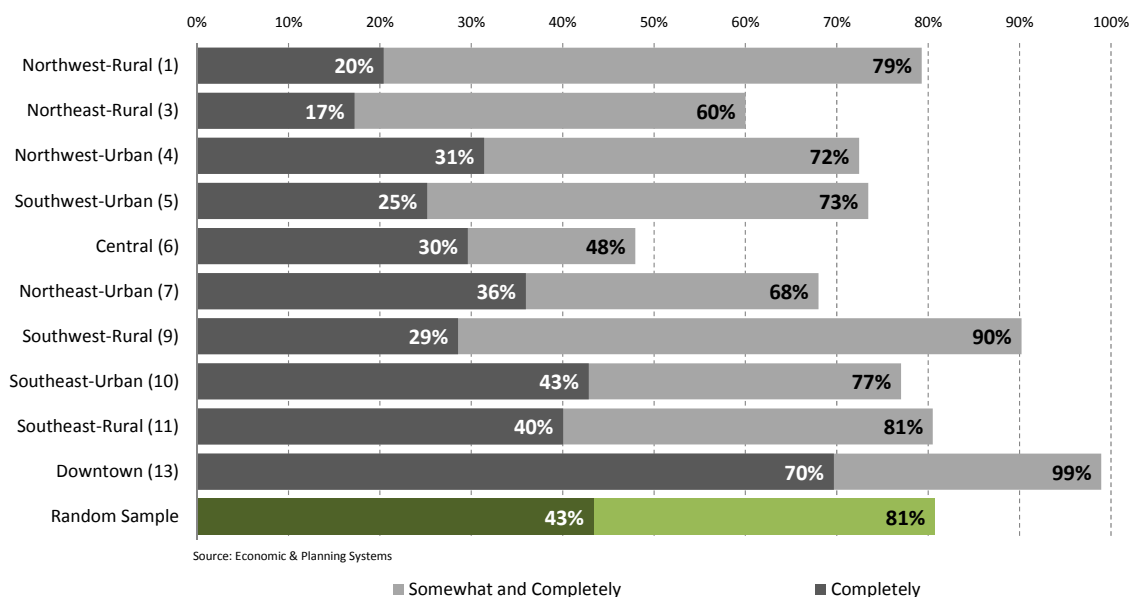


Figure B61
Short Commute to Work Meeting Needs



Close Proximity to Place of Worship

As compared to the cross-tabulation by age cohort, there seems to be little pattern to this variable.

Figure B62
Close Proximity to Place of Worship Importance

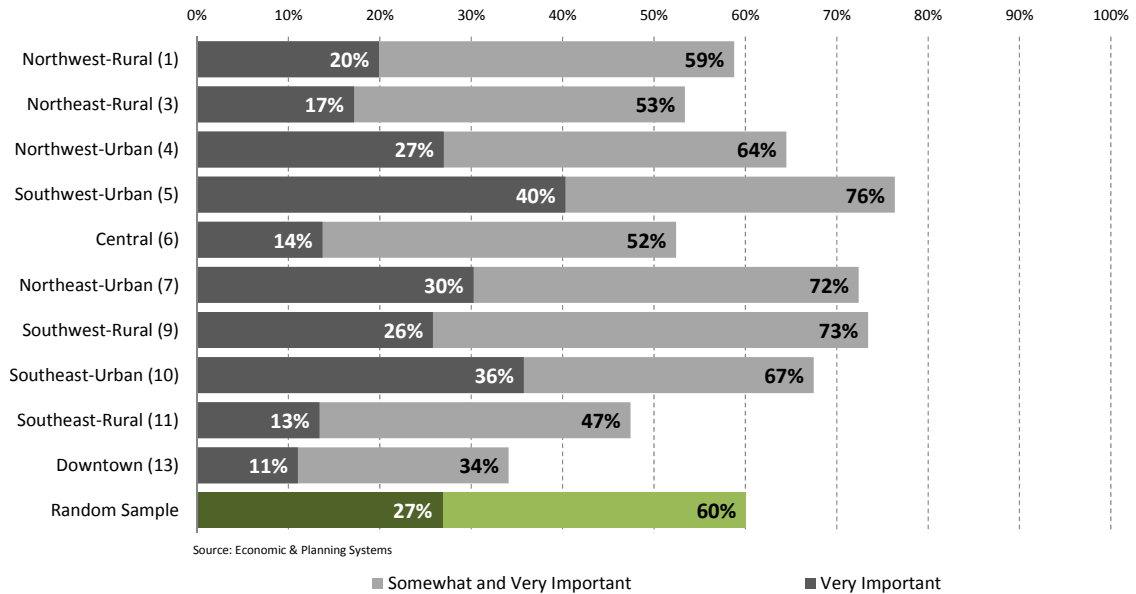
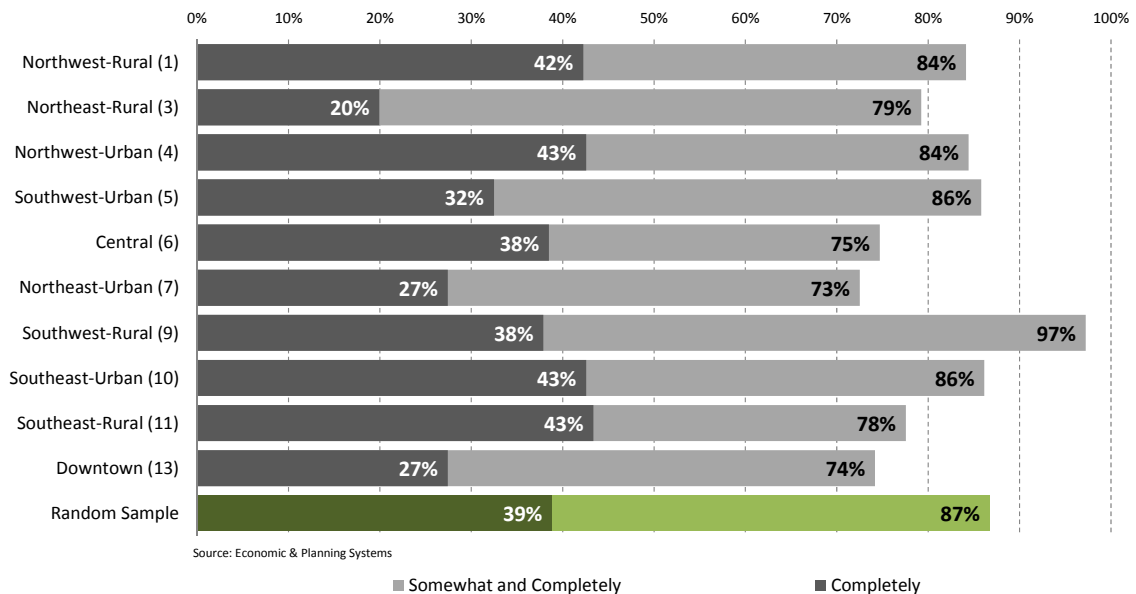


Figure B63
Close Proximity to Place of Worship Meeting Needs



Close Proximity to Parks, Trails, and Open Space

Households in Subareas 5 and 7 seem to view this more importantly than households in other Subareas. These same households do not, however, seem generally satisfied with their conditions. Interestingly, the lowest percent of households that view proximity to parks, trails, and open space as very important were in Subarea 9, but they are the only group of households that is most satisfied. It seems that proximity to these amenities might be better invested in Subareas where they are going to be valued.

Figure B64
Proximity to Parks/Trails/Open Space Importance

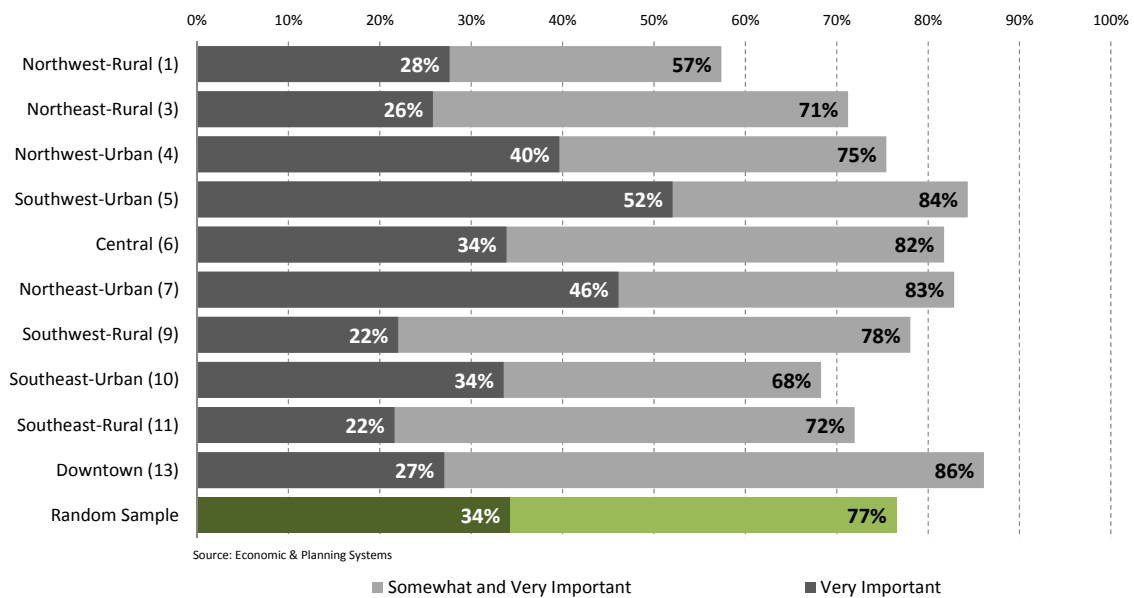
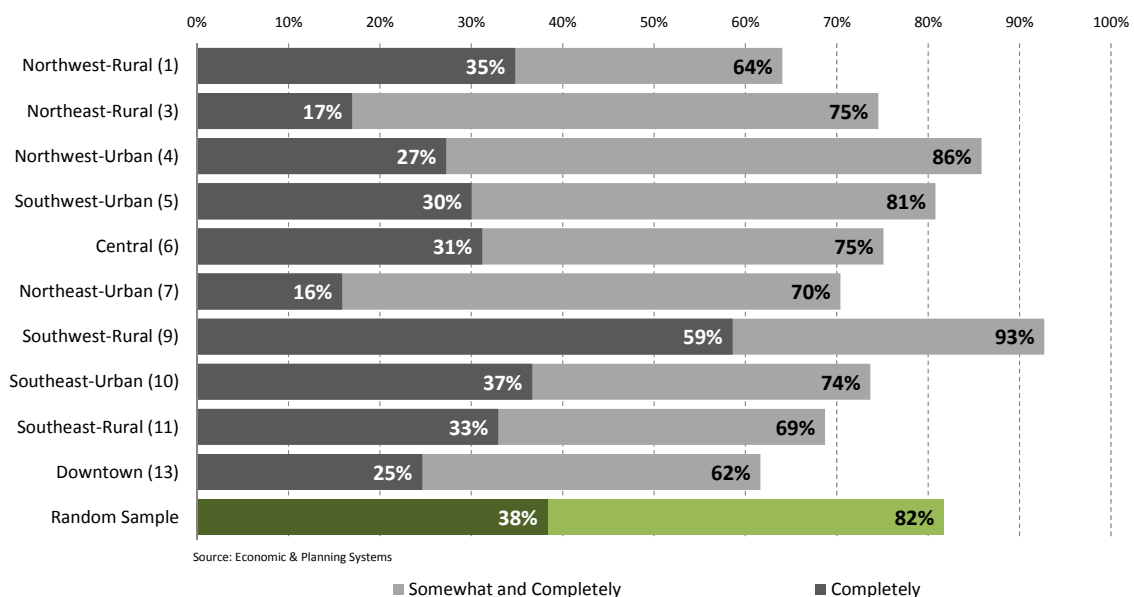


Figure B65
Proximity to Parks/Trails/Open Space Meeting Needs



Close Proximity to Schools, Shops, and Entertainment

Generally, 40 percent of households view this as very important, and nearly 50 percent are completely satisfied. Households in Subareas 6 and 7 view this as more important than households in other Subareas. Households in these Subareas, however, are generally not among the highest portion of households who are most satisfied. Households in Subareas 4 and 9 do not generally view this as very important, but they have the highest levels of satisfaction.

Figure B66
Proximity to Schools/Shops/Entertainment Importance

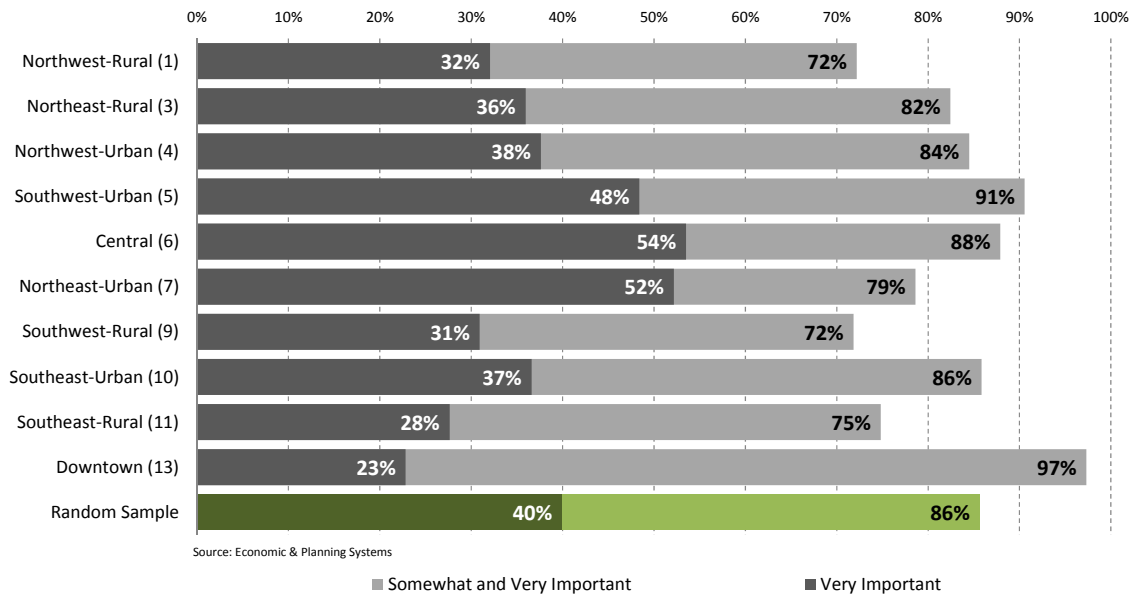
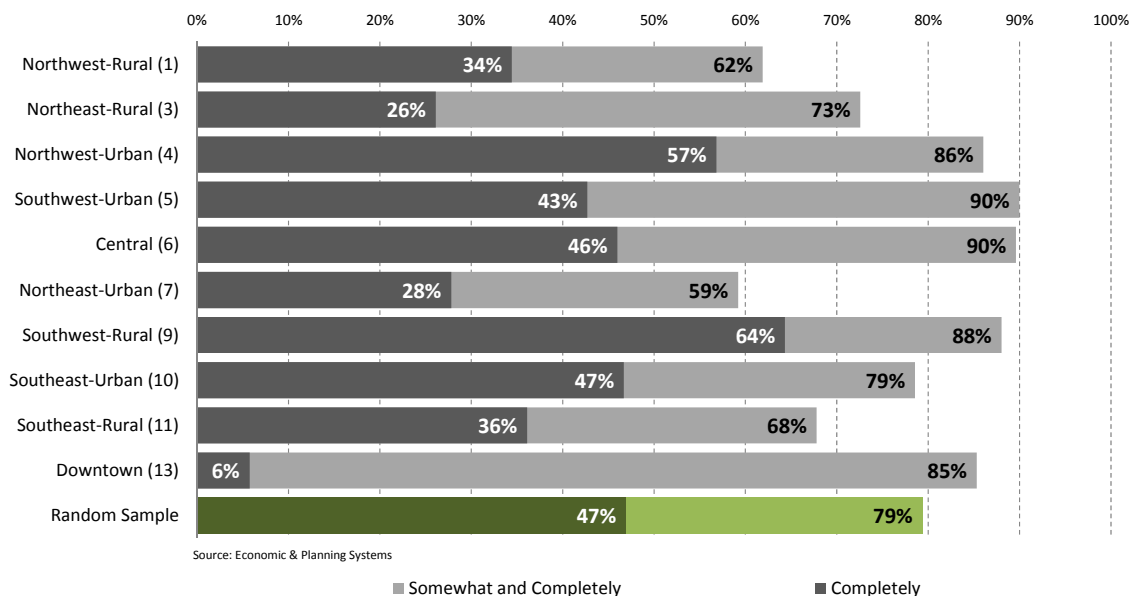


Figure B67
Proximity to Schools/Shops/Entertainment Meeting Needs



Close Proximity to Train, Streetcar, or Bus

As anticipated, households in more central parts of the city view proximity to public transportation as very important, and they similarly have rather high (relatively) levels of satisfaction. Overall, it seems that households in other Subareas do not view proximity to public transportation options as very important, but their levels of satisfaction also suggest that they are not very satisfied with their lack of public transportation options.

Figure B68
Proximity to Train/Streetcar/Bus Importance

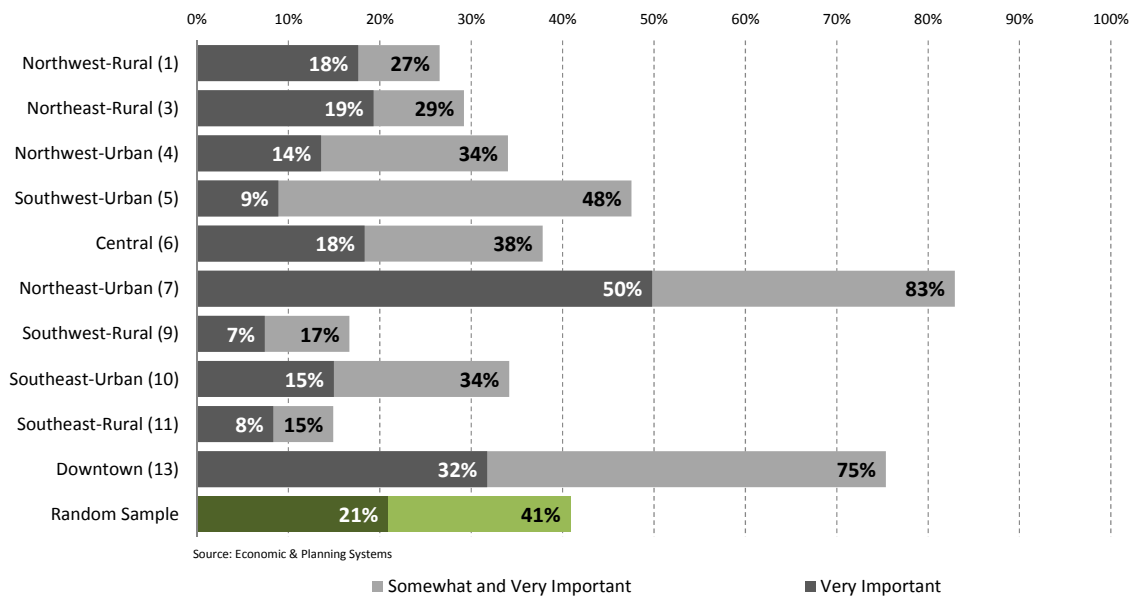
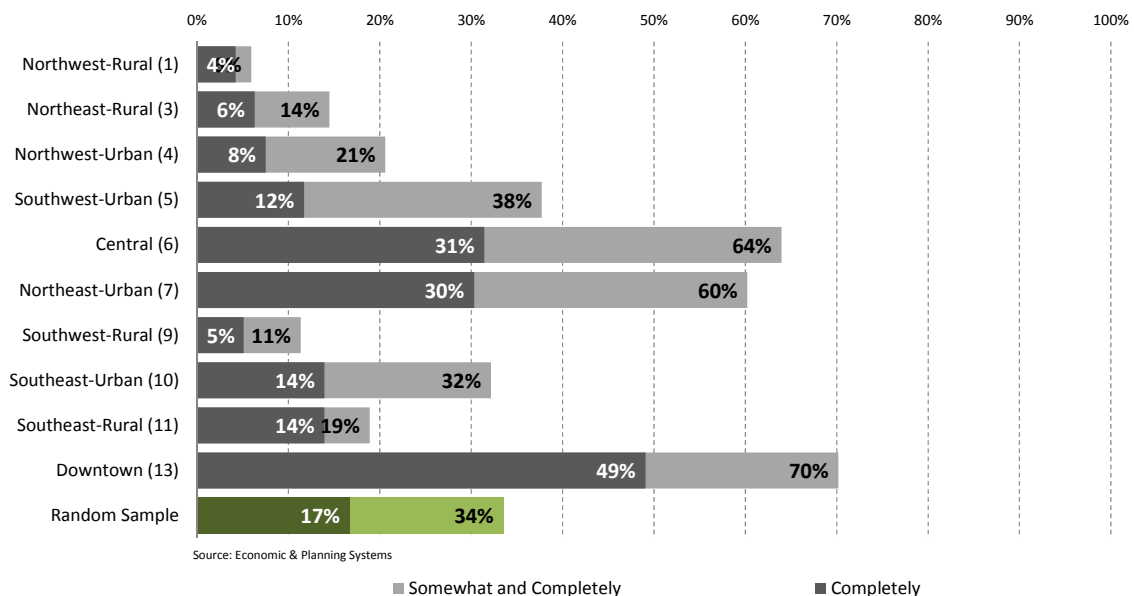


Figure B69
Proximity to Train/Streetcar/Bus Meeting Needs



Housing Type Preferences by Age

In general, younger generations rate each of the product types more favorably than their older cohorts, but the difference between their desirability rankings and the older ages for multi-family product is more pronounced. For example, 18 to 24 year-olds view both mid-rise multi-family projects nearly twice as desirable as all the survey-takers, whereas their enthusiasm for the single-family product was only marginally greater than the older generations, if not lower in one of the cases.

Figure B70
Desirability of Mid-Rise MF #1 (Image Preferences)

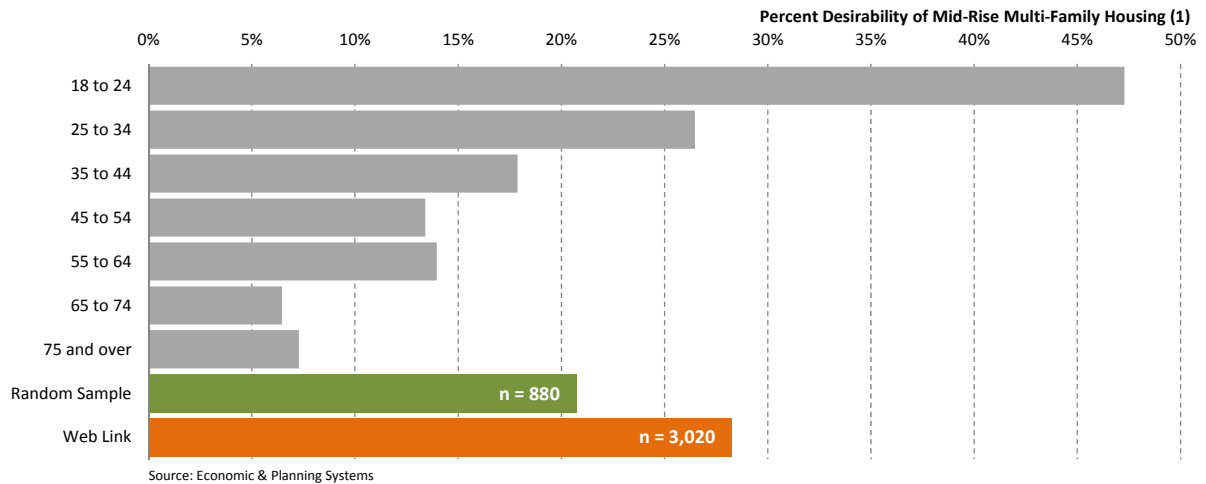


Figure B71
Desirability of Duplex #2 (Image Preferences)

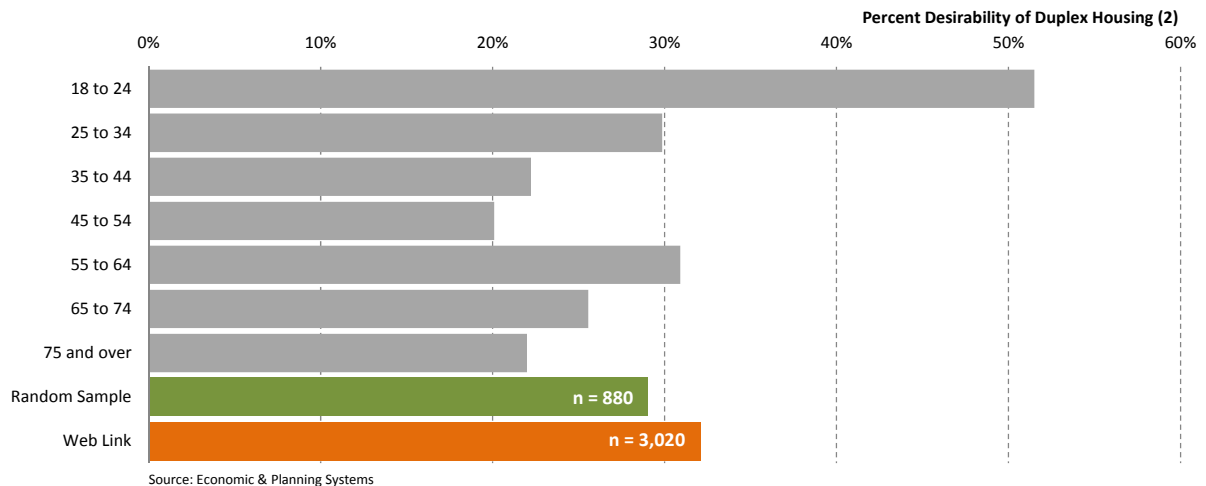


Figure B72
Desirability of Mid-Rise MF #3 (Image Preferences)

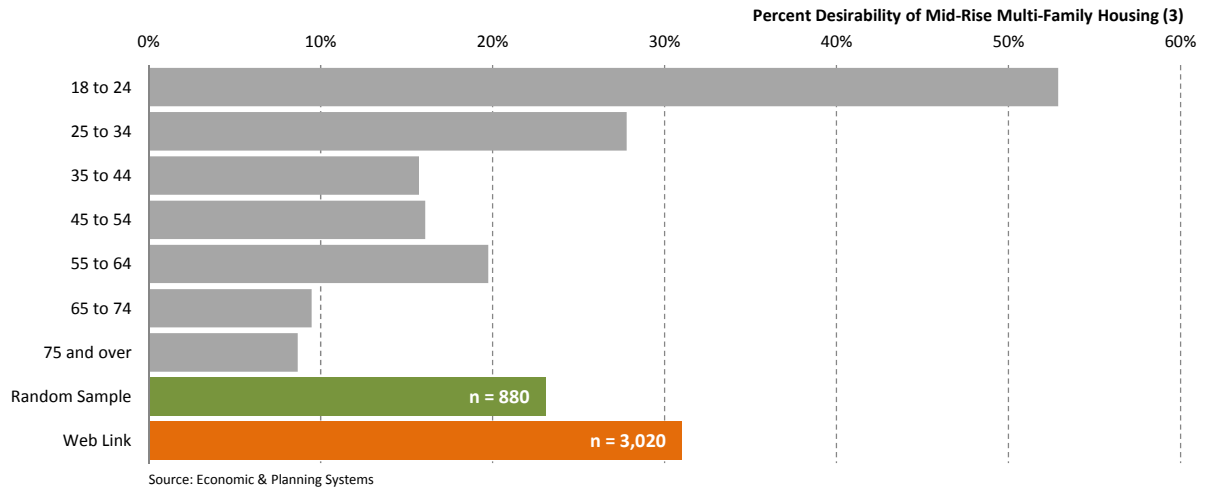


Figure B73
Desirability of Traditional Single-Family #4 (Image Preferences)

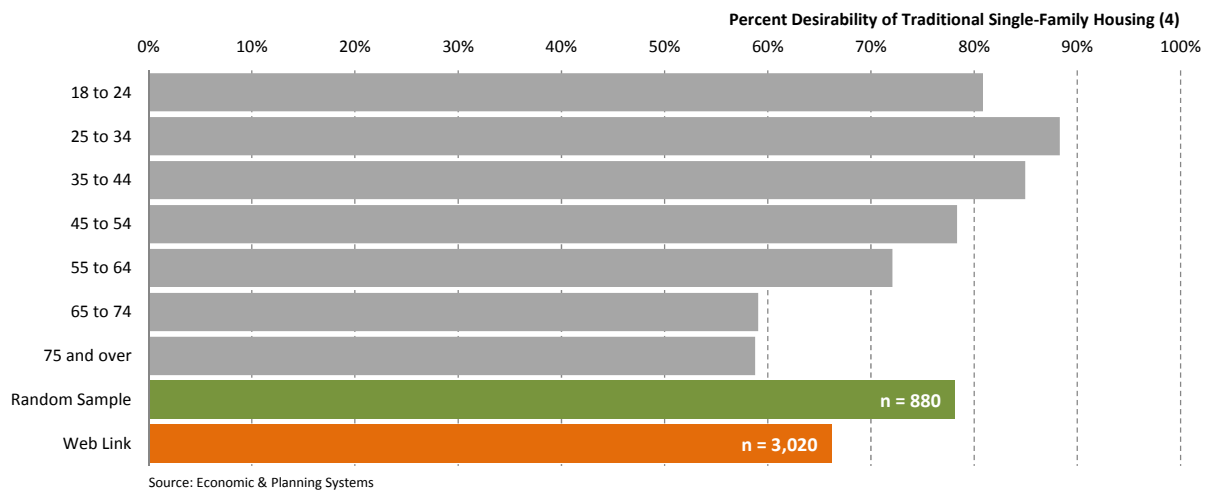


Figure B74
Desirability of Low-Rise Multi-Family #5 (Image Preferences)

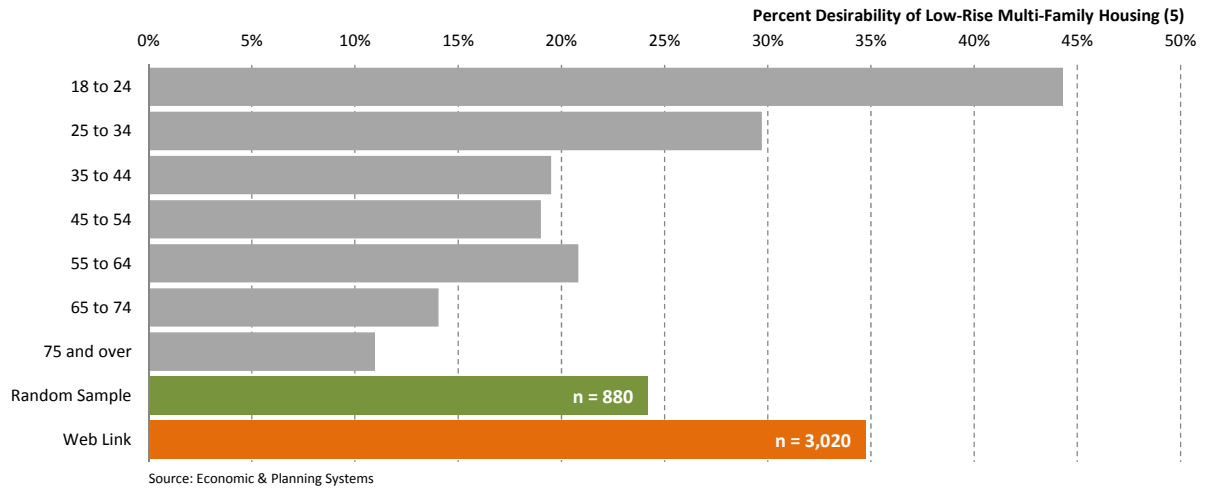
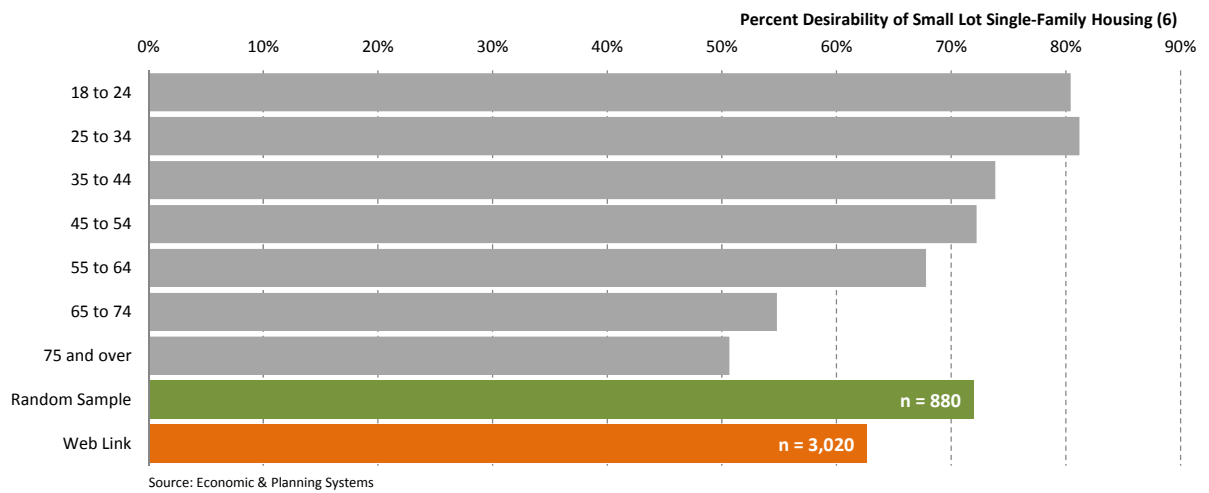


Figure B75
Desirability of Small Lot Single-Family #6 (Image Preferences)





Appendix C: Methodology Overview

Methodology Overview

The following outline of the demand forecast methodology is intended to give the reader an understanding of the structure of the forecast and its major assumptions.

1. Age Forecast

The first step in the process involved incorporating the City's population forecasts by age cohort. Originally completed at the Census Tract level, this effort used the forecasts only at the aggregate (citywide) level so that independent forecasts of growth by Subarea could be made with regard to the analysis of household preferences.

2. Housing Turnover

Turnover is the total of households that are moving from their current home in the city either to another location within the city or leaving the city.

- **Households Leaving City:** The methodology considers the rates of likelihood (only those indicating "very likely") of households by age category and by Subarea
- **Households Staying in City:** The analysis also separates out households who indicate they are very likely to staying in the city, as well as those who indicate they "don't know" where they want to move

3. Initial Housing Demand

The estimated *initial demand* has two primary components: households moving to the city and those moving within the city. *Initial demand* is also described in the following Appendix on the sensitivity analysis results.

- **2020 Forecast:** The 2020 forecast is a combination of basic methodologies. The first component identifies in which Subarea households of a certain age cohort prefer to live, which produces a series of Subarea rankings 1 through 4. The second component estimates a best alignment of each household's value profile, defined by an array of scores for how important each of the 14 housing, neighborhood, and community attributes are, with a Subarea's asset profile, defined also by an array of scores associated with how satisfied a Subarea's current households are with those attributes. The estimates of demand per Subarea are the product of iteratively estimating the best fit for each survey-taker with a Subarea. Each household value profile was correlated against each Subarea and ranked for best fit. It was anticipated that some Subareas would rank highly for a portion of the population. As such, the rankings were used to iteratively allocate where demand would go as a result of a "second" or "third" choice. It should be noted that this methodology produces a net zero change in housing units for Subarea 10. In large part, the methodology is weighted to accentuate the households' perceptions of each Subarea. In reality, Subarea 10 will likely receive some spillover demand from Subarea 13.
- **2030 Forecast:** This forecast period uses the same progression of methodologies as the 2020 forecast with one important distinction. The alignment of household and area profiles is done with modified "area" asset profiles. For this time period, it is assumed that the City may have achieved various infrastructure investments, such as the completion of the streetcar, MAPS3 projects, existing GO bond projects, and begun substantial work on MAPS4 projects as well as future GO bond-funded improvements.

4. Potential and Final Demand

This was an iterative process with City and EPS staff to identify which areas of the City would most likely respond to targeted infrastructure and service improvements. *Potential demand*, as described also in the following appendix which outlines the sensitivity analysis results, is an estimate that characterizes the housing demand possible under the circumstances of households being completely satisfied with one of 14 housing, neighborhood, or community attributes. *Final demand*, also described in the following appendix, is estimated after the City determined where and to what degree projects and program investments would be made.

- **Potential Demand:** To test demand sensitivity to housing, neighborhood, and community-level satisfaction, demand for each Subarea was estimated holding each of the 14 attributes constant among Subareas. The result illustrated which areas were likely to respond the most to infrastructure investments in terms of demand magnitude and which areas were not.
- **Sensitivity Analysis:** See the following Appendix. A series of graphs depicting the magnitude of response to improvements for each Subarea, the City identified levels of unique improvements to make for each Subarea that could trigger increased demand for certain areas.
- **Final Demand:** The demand forecast was recalibrated with project and program investments strategically placed throughout the city to estimate where and to what degree households would desire to live or move to certain Subareas.

5. Housing Types

This component of the methodology also uses preference patterns at the age cohort level, as well as reference points to current Subarea housing type profiles. Specifically, it integrates a household's preferences from the image assessment question (see **Figure 8**), as well as the image assessments of housing types from the Community Appearance Survey, completed October 2013.

- **Age Cohort Housing Desirability Scores:** One of primary assumptions of this analysis is that each age cohort carries their housing type preferences with them as they age. That is, the analysis assumes that younger generations maintain their level of interest in multi-family and higher-density single-family product as they age throughout the forecast horizon. The only exception was the general level of interest in single-family product remains constant because of its strong desirability within the city's housing market. So, while desirability of certain types of product increases over time, desirability of single-family product holds steady. The result of this technique was to not over-estimate the demand for multi-family product.

6. Subarea Estimates

Housing types by Subarea are estimated on the basis of two sets of factors: the age cohort preference methodology as described above, as well as the incorporation of existing housing type profiles by Subarea. Each Subarea has a different housing composition, and the effect of this methodology is that new housing development be reflective of existing housing as well as types that are being demanded. This ensures that the demand forecast does not overestimate the magnitude of a housing type in Subarea's where it currently does not exist.



Appendix D: Subarea Sensitivity to Investment

Sensitivity Analysis by Subarea

This appendix outlines the results of the analysis used to determine whether and to what extent project and program investment in Subareas would be effective. The process between EPS and the City was an iterative one, as described below:

- *Initial demand* was identified for each Subarea given the housing demand estimated by correlating resident value profiles against Subarea asset profiles. *Initial demand* is shown on each of the following graphics by a red line.
- *Potential demand* was estimated to approximate whether households were likely to prefer Subareas different to their stated choice if their decisions were not affected by each characteristic (similar to the finding that households would often prefer to live in different Subareas when their decisions were not affected by school quality). To estimate *potential demand*, EPS augmented satisfaction levels for each of the 14 Subarea characteristics one at a time to 100 percent and measured the effect it had on each Subarea. In the following graphics, *potential demand* is illustrated by the series of gray bars. For example, in **Figure C6** (Subarea 7), when satisfaction in curb appeal and construction quality is increased to 100 percent in all Subareas, *potential demand* increases to 7,800 units, or 3,300 units over the estimated 4,500 units of *initial demand*. This means that Subarea 7 could capture additional housing demand from other Subareas when investments in curb appeal and construction quality are made.
- After reviewing the results of this sensitivity analysis with the City, the City made an approximation of the magnitude and types of investment that could be made in specific Subareas. These *targeted investments* were identified and used as fixed inputs to the model to determine both housing demand for the periods between 2010 and 2020, as well as 2020 and 2030.
- *Final demand* was determined with the input of the *targeted investments* identified by the City and are reflected in the forecasts of housing presented in this study. Because these forecasts assume that the *targeted investments* in projects and programs occur, what results will likely differ as timing and funding issues are subject to political processes and market conditions.

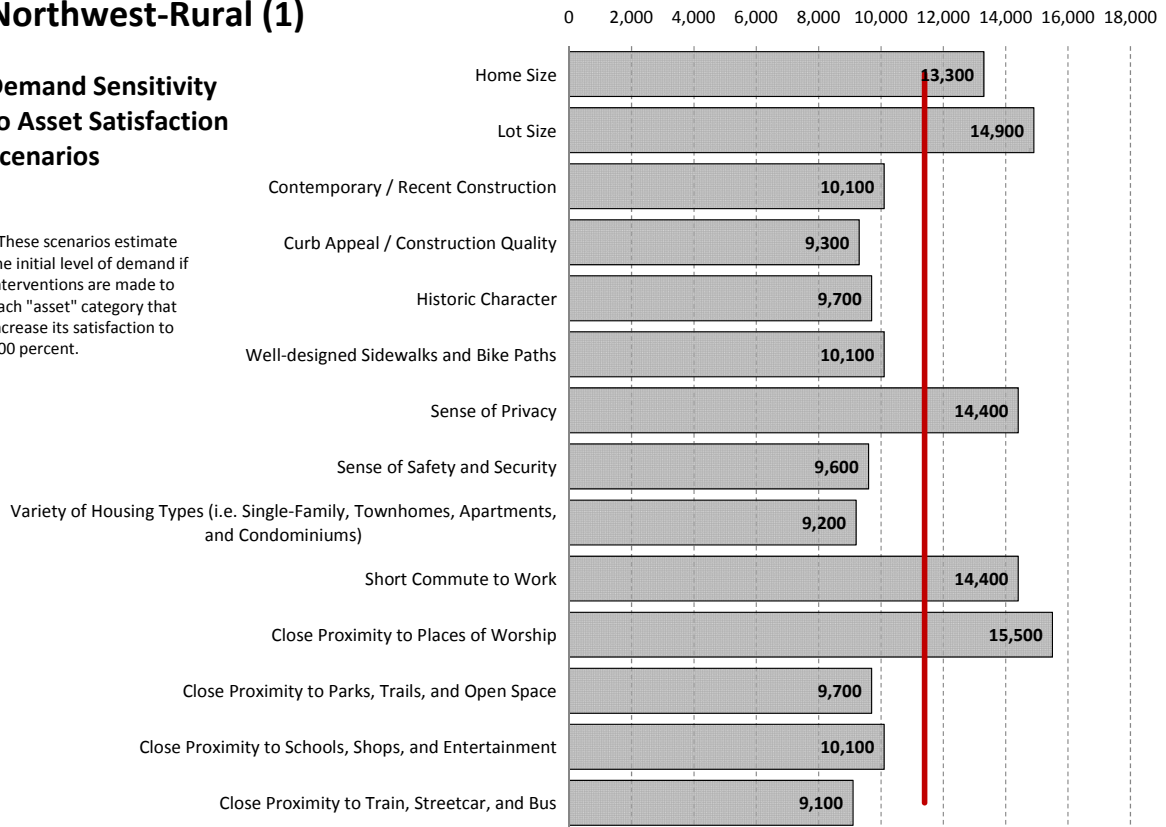
Initial demand for Subarea 1 is approximately 11,400 units, and increased satisfaction levels of various characteristics have relatively negative effects on potential demand. For example, when satisfaction in curb appeal and construction quality are increased citywide, potential demand decreases in this because the attractiveness of other Subareas increase. On the other hand, when satisfaction in short commute time increases, potential demand increases to approximately 14,400 units. Nevertheless, this Subarea does not respond as dynamically as others do and is characterized as an area of stability, or relatively inelastic demand.

Figure D1
Subarea 1

Northwest-Rural (1)

Demand Sensitivity to Asset Satisfaction Scenarios

*These scenarios estimate the initial level of demand if interventions are made to each "asset" category that increase its satisfaction to 100 percent.



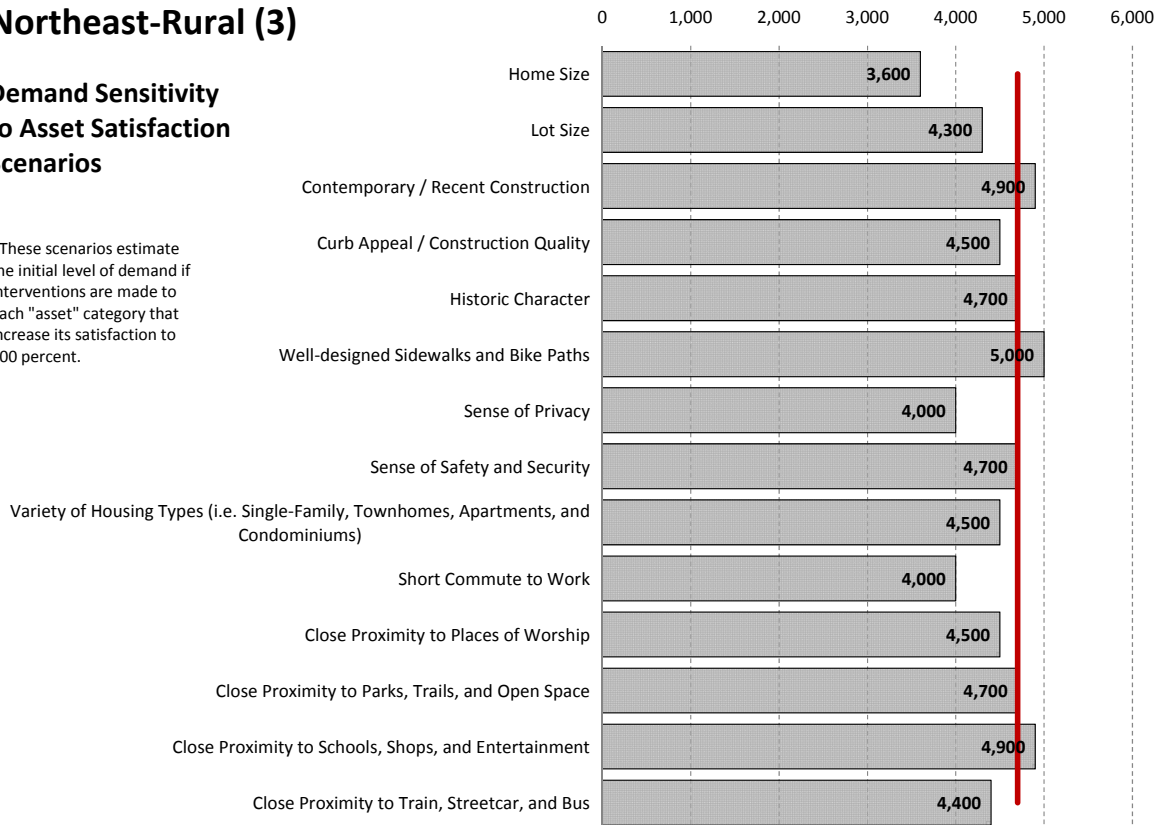
Initial demand for Subarea 3 is approximately 4,700 units. Similar to Subarea 1, this one is also characterized by generally subtle and negative change in potential demand. In most cases, when levels of satisfaction are raised for each of the characteristics, it is estimated that fewer households would choose to live in Subarea 3, favoring other areas over this one.

Figure D2
Subarea 3

Northeast-Rural (3)

Demand Sensitivity to Asset Satisfaction Scenarios

*These scenarios estimate the initial level of demand if interventions are made to each "asset" category that increase its satisfaction to 100 percent.



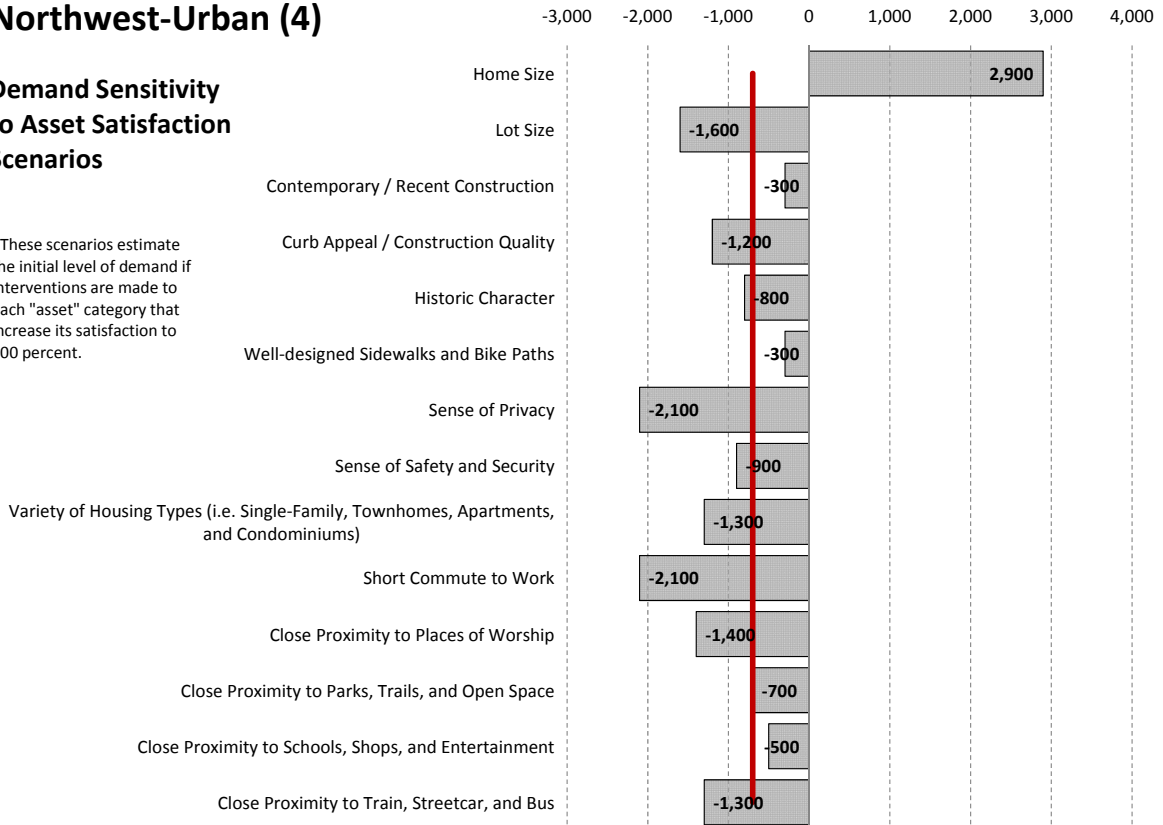
Initial demand for Subarea 4 indicates an initial net loss of approximately 700 units. While the Subarea responds negatively to most increases in satisfaction levels, an increase to home size satisfaction (an aspect of a community's characteristics the City has little purview over) affects potential demand positively.

Figure D3
Subarea 4

Northwest-Urban (4)

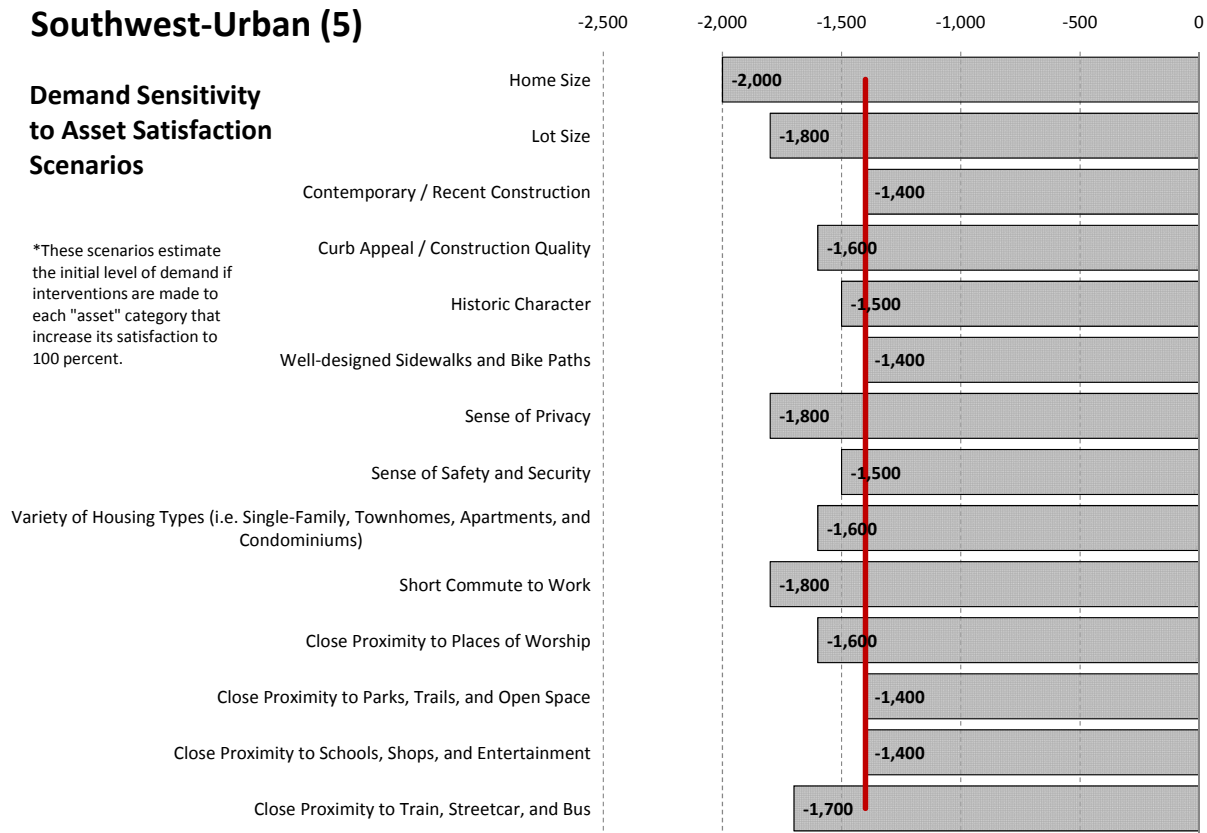
Demand Sensitivity to Asset Satisfaction Scenarios

*These scenarios estimate the initial level of demand if interventions are made to each "asset" category that increase its satisfaction to 100 percent.



Initial demand for Subarea 5 indicates a net loss of approximately 1,400 units. In general, when satisfaction levels increase citywide, this Subarea appears to be the net loser of housing demand.

Figure D4
Subarea 5



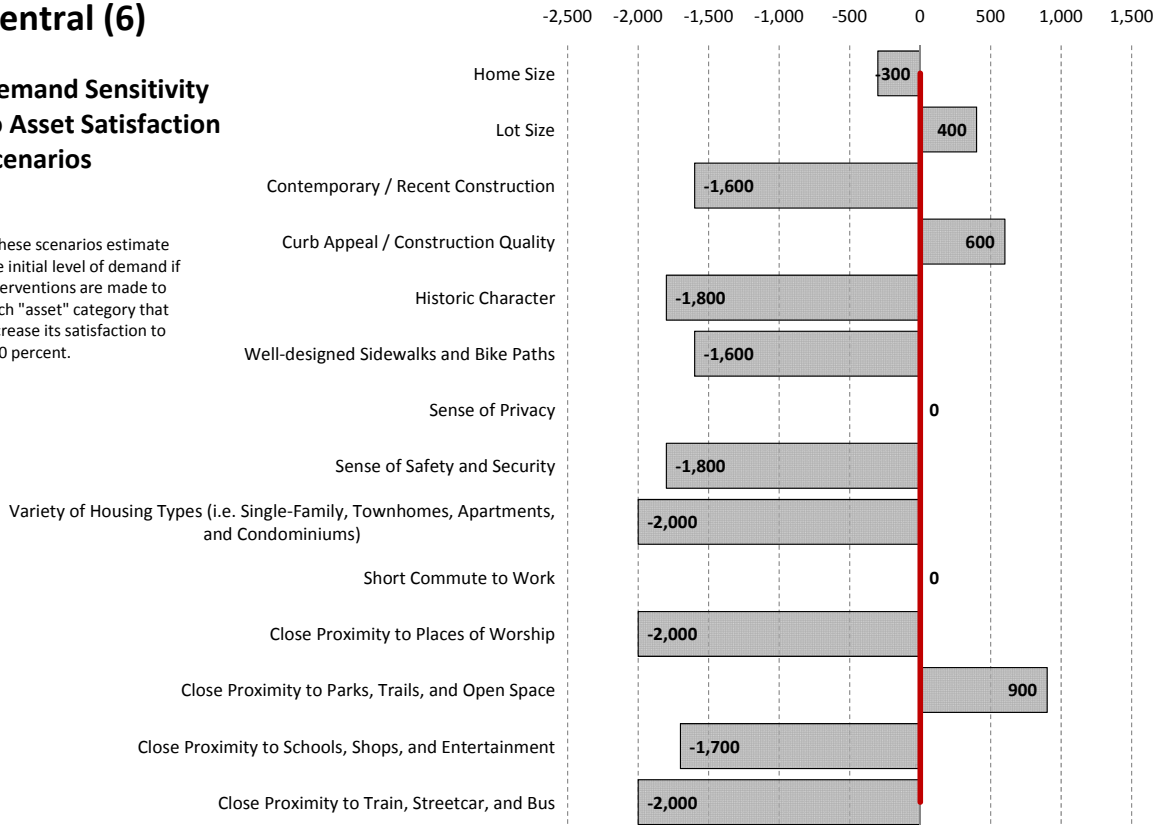
Subarea 6 is also estimated to have an initial demand of zero housing units. With increased satisfaction in lot size, curb appeal/construction quality, and close proximity to parks, trails, and open space, however, this Subarea is estimated to benefit positively between 400 and 900 units. This Subarea is categorized as an area of transformation.

Figure D5
Subarea 6

Central (6)

Demand Sensitivity to Asset Satisfaction Scenarios

*These scenarios estimate the initial level of demand if interventions are made to each "asset" category that increase its satisfaction to 100 percent.



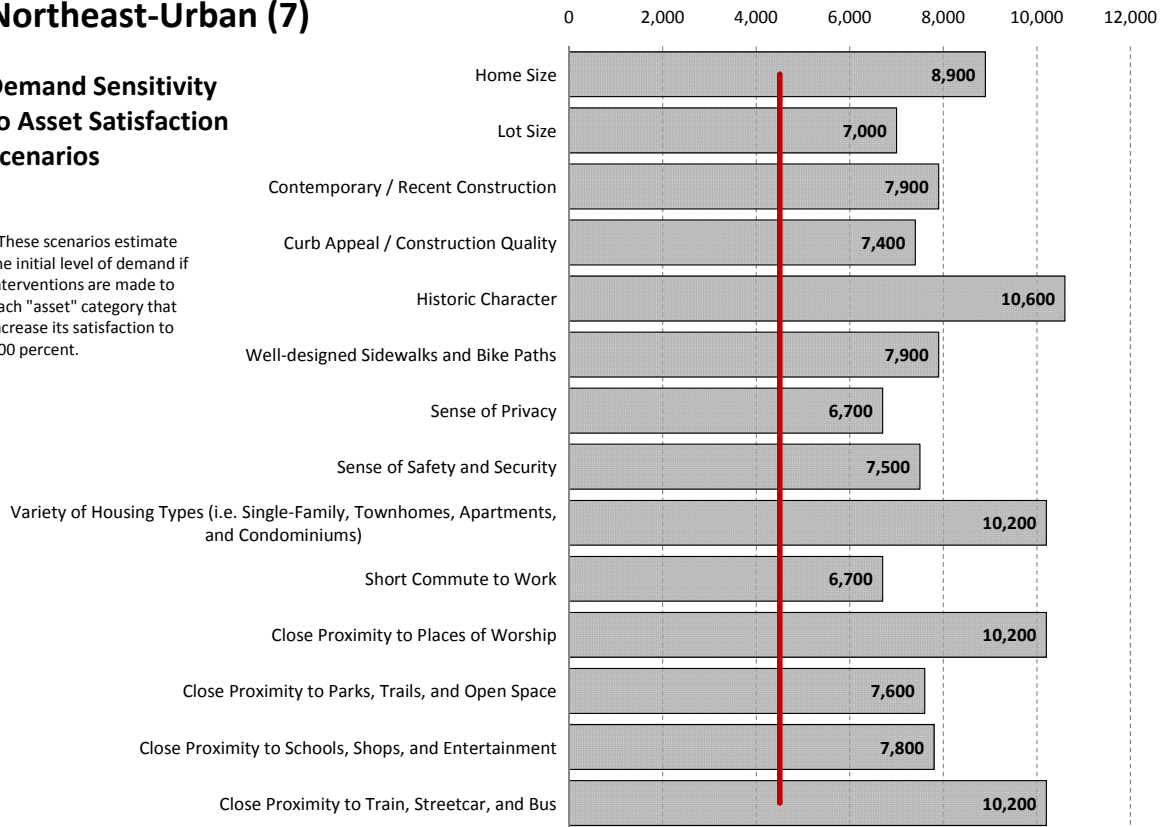
Subarea 7 is also estimated to have an initial demand of approximately 4,500 units. With increased satisfaction in the various housing, neighborhood, and community characteristics resulting in various degrees of positive impact, this Subarea is also categorized as an area of transformation.

Figure D6
Subarea 7

Northeast-Urban (7)

Demand Sensitivity to Asset Satisfaction Scenarios

*These scenarios estimate the initial level of demand if interventions are made to each "asset" category that increase its satisfaction to 100 percent.



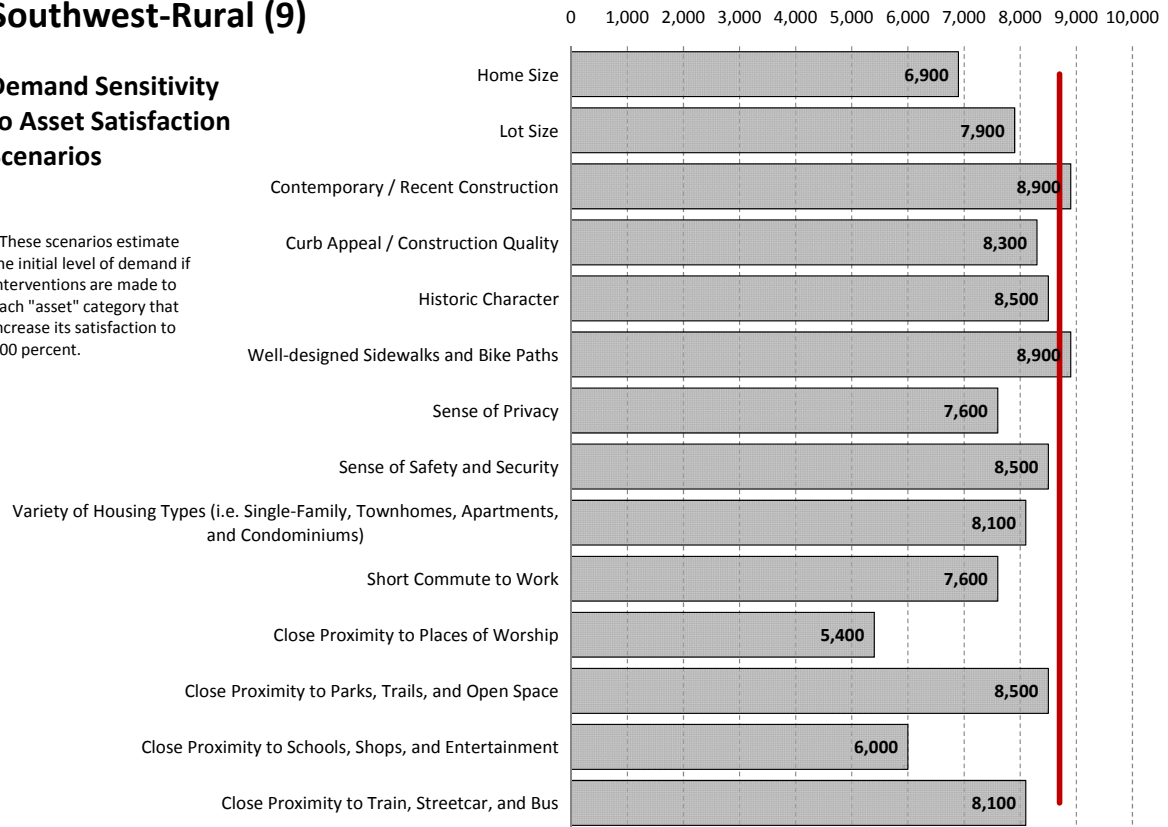
Initial demand for Subarea 9 is approximately 8,700 units. Similar to Subareas 1, 3, and 5, this one also generally loses housing demand to other areas when investment yields increased satisfaction elsewhere in the city. That is, in most cases, when levels of satisfaction are raised for each of the characteristics, it is estimated that fewer households would choose to live in Subarea 9, particularly with respect to proximity to schools, shops, and entertainment.

Figure D7
Subarea 9

Southwest-Rural (9)

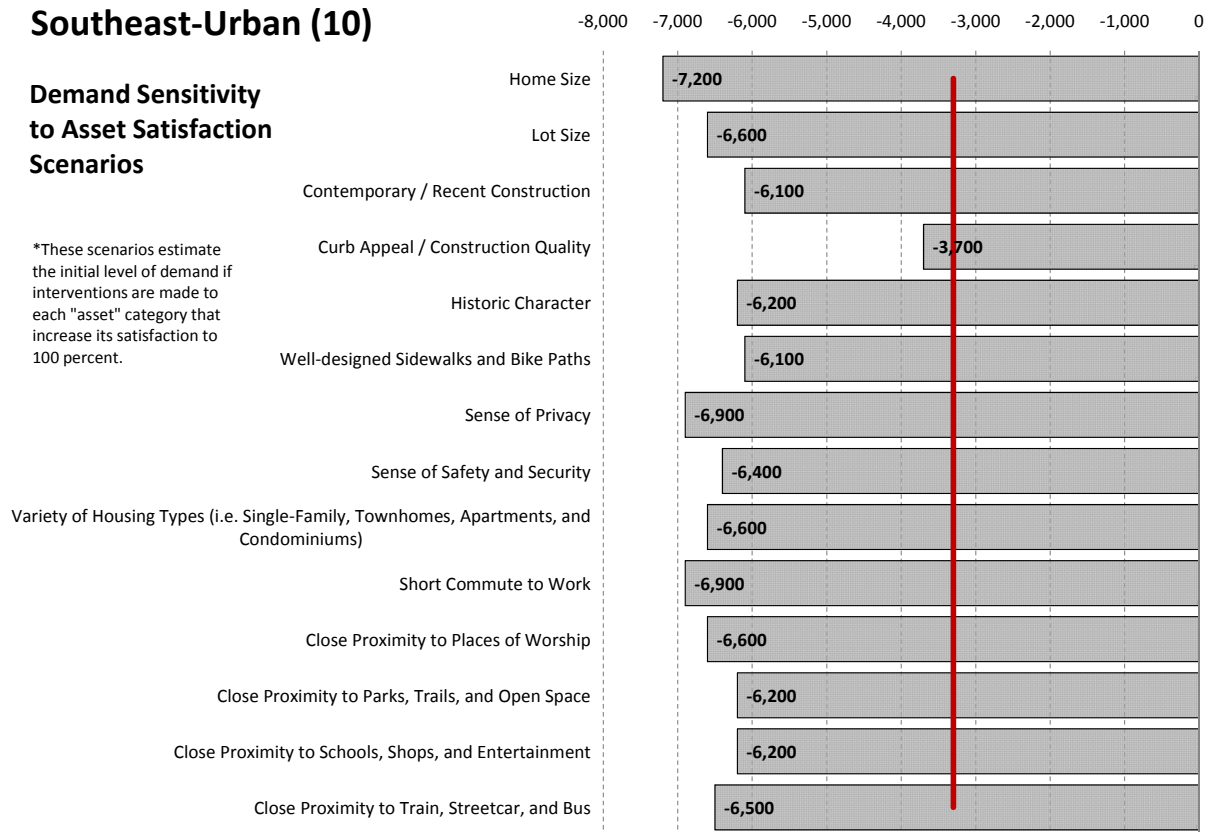
Demand Sensitivity to Asset Satisfaction Scenarios

*These scenarios estimate the initial level of demand if interventions are made to each "asset" category that increase its satisfaction to 100 percent.



Demand for Subarea 10 shows an initial loss of approximately 3,300 units, but even more as various aspects of satisfaction are improved throughout the city.

Figure D8
Subarea 10



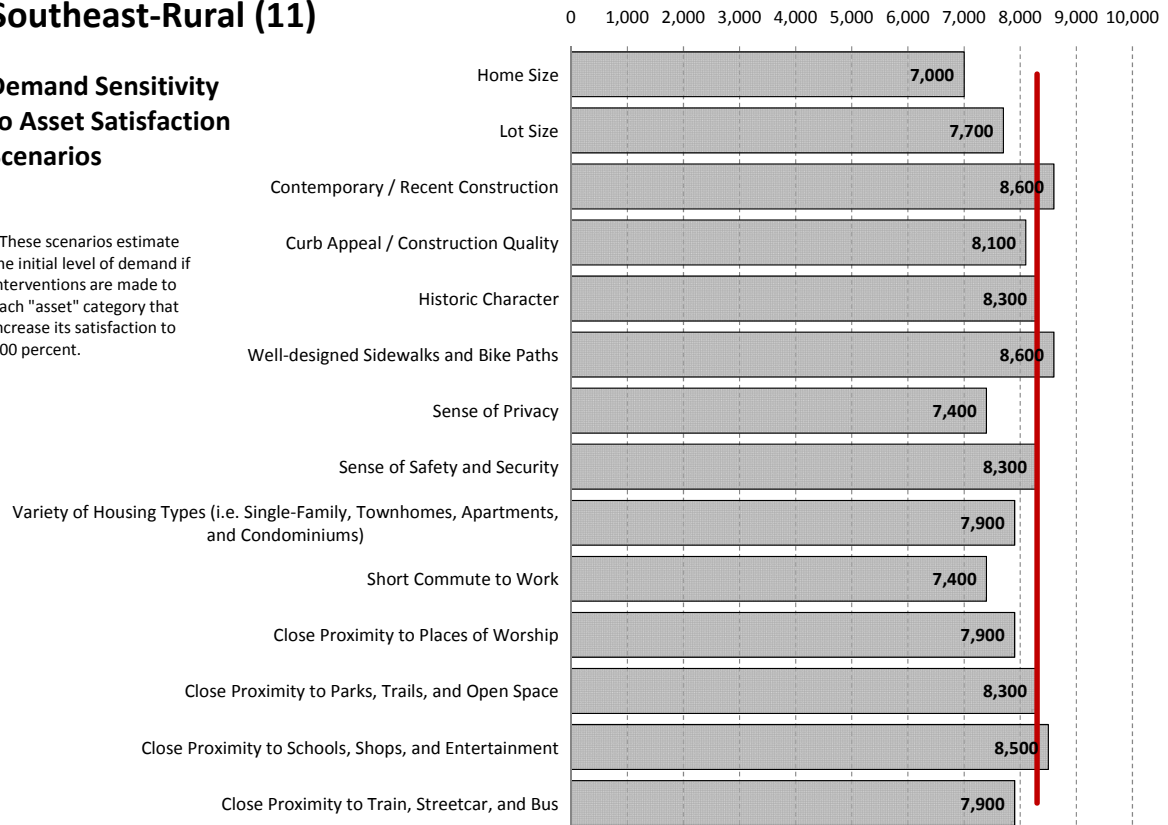
Initial demand for Subarea 11 is approximately 8,300 units. Similar to the other rural Subareas, this one also generally loses housing demand to other areas when investment yields increased satisfaction elsewhere in the city.

Figure D9
Subarea 11

Southeast-Rural (11)

Demand Sensitivity to Asset Satisfaction Scenarios

*These scenarios estimate the initial level of demand if interventions are made to each "asset" category that increase its satisfaction to 100 percent.



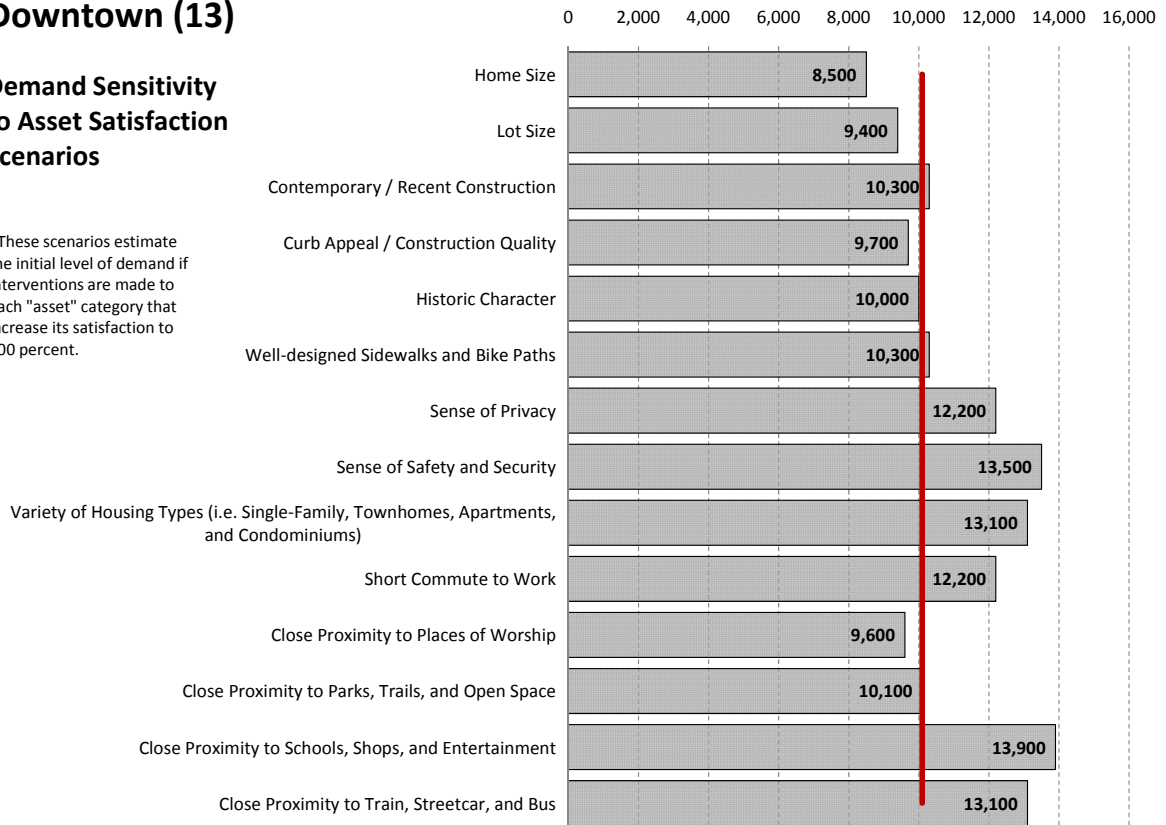
While Subarea 13 is not technically identified as an area of transformation, the results of the sensitivity analysis suggest that it could be the biggest gainer in terms of housing demand. Initial demand is estimated at 10,100 units, but various changes to satisfaction levels very important to households could bring demand up even higher.

Figure D10
Subarea 13

Downtown (13)

Demand Sensitivity to Asset Satisfaction Scenarios

*These scenarios estimate the initial level of demand if interventions are made to each "asset" category that increase its satisfaction to 100 percent.



•



Appendix E: Survey Instrument

OKLAHOMA CITY HOUSING PLAN SURVEY

The City of Oklahoma City would like your opinion to help understand what housing choices and considerations will be important to metro-area households in the coming years. Please complete and return this survey within 10 days. Your response is COMPLETELY CONFIDENTIAL. Should you have any questions, you are welcome to contact our professional survey consultant, Chris Cares with RRC Associates, at the toll-free number 1-888-449-4772 x2115. Thank you very much for your time.

ABOUT YOU AND YOUR CURRENT HOUSEHOLD

1. How long have you lived in the Oklahoma City area? ...And in your current home?

	LIVED IN THE AREA	LIVED IN CURRENT HOME
Less than 1 year	☐	☐
1 to 4 years	☐	☐
5 to 9 years	☐	☐
10 to 19 years	☐	☐
20 years or more	☐	☐

2. How many people in your household fall into these age groups? (INCLUDE YOURSELF)

_____ Under 5
_____ 5 to 11
_____ 12 to 17
_____ 18 to 25
_____ 26 to 45
_____ 46 to 65
_____ Over 65

3. What school district do you live in?

☐ Oklahoma City SD
☐ Edmond SD
☐ Putnam City SD
☐ Moore SD
☐ Don't know
☐ Other: _____

4. Which of the following best describes your household?

1 ☐ Adult living alone
2 ☐ Single parent with child(ren)
3 ☐ Couple with child(ren)
4 ☐ Couple, no child(ren)
5 ☐ Empty-nesters (children have left home)
6 ☐ Unrelated roommates
7 ☐ Immediate and extended family members
8 ☐ Other: _____

5. What first brought you to Oklahoma City?

1 ☐ Have always lived here
2 ☐ College/education
3 ☐ Job
4 ☐ Sense of community
5 ☐ Amenities, recreational activities
6 ☐ Family
7 ☐ Other: _____

6. Do you own or rent your residence?

☐ Own
☐ Rent
☐ Other: _____

7. In what type of residence do you live?

01 ☐ Single-family house on more than 5 acres
02 ☐ Single-family house on 1 to 5 acres
03 ☐ Single-family house on ¼ acre to 1 acre
04 ☐ Single-family house on less than ¼ acre
05 ☐ Townhome
06 ☐ Duplex
07 ☐ Apartment
08 ☐ Mobile home
09 ☐ Condominium
10 ☐ Other: _____

8. How many bedrooms are in your home?

_____ bedrooms

9. Which is more important to you in deciding where to live? (CHECK ONLY ONE)

☐ The size of a house
☐ The neighborhood
☐ Other: _____

10. Which of the following types of neighborhoods would you prefer? (CHECK ONLY ONE)

- ☐ **A:** You typically *drive* to get to schools, stores, and restaurants and houses are farther apart on *larger lots*.
☐ **B:** You typically *walk* to get to schools, stores, and restaurants and houses are closer together on *smaller lots*.
☐ **C:** No preference

11. What is your primary mode of commuting to/from work, school, or another ordinary destination? And what would you prefer in the future?

11a. Now (CHECK ONLY ONE)

- 1 ☐ Car (one person)
2 ☐ Carpool/vanpool (2+ people)
3 ☐ Bus
4 ☐ Streetcar/commuter rail
5 ☐ Bicycle
6 ☐ Walk
7 ☐ Other _____

11b. Preferred for the Future (CHECK ALL THAT APPLY)

- 1 ☐ Car (one person)
2 ☐ Carpool/vanpool (2+ people)
3 ☐ Bus
4 ☐ Streetcar/commuter rail
5 ☐ Bicycle
6 ☐ Walk
7 ☐ Other _____

**12. A. Please identify how important the following housing, neighborhood and location considerations are to you.
B. For each of the considerations, rate how well your current needs are being met.**

**12A. IS THIS CONSIDERATION
IMPORTANT TO YOU?**

**12B. HOW WELL DOES YOUR HOME OR
NEIGHBORHOOD MEET YOUR
CURRENT NEEDS FOR EACH OF THESE
CHARACTERISTICS?**

NOT AT ALL	NOT VERY	SOMEWHAT	VERY		NOT AT ALL	NOT MUCH	SOMEWHAT	COMPLETELY	DON'T KNOW
1	2	3	4	Housing Considerations	1	2	3	4	x
1	2	3	4	Home size	1	2	3	4	x
1	2	3	4	Lot size	1	2	3	4	x
1	2	3	4	Contemporary / Recent construction (i.e., new house)	1	2	3	4	x
1	2	3	4	Price	1	2	3	4	x
1	2	3	4	Curb appeal / Construction quality	1	2	3	4	x
Neighborhood Considerations									
1	2	3	4	Historic character	1	2	3	4	x
1	2	3	4	Well designed sidewalks and bike paths	1	2	3	4	x
1	2	3	4	Sense of privacy	1	2	3	4	x
1	2	3	4	Sense of safety and security	1	2	3	4	x
1	2	3	4	Variety of housing types (i.e., single-family homes, townhouses, apartments and condominiums)	1	2	3	4	x
Location Considerations									
1	2	3	4	Short commute to work	1	2	3	4	x
1	2	3	4	Close proximity to places of worship	1	2	3	4	x
1	2	3	4	Close proximity to parks, trails, and open space	1	2	3	4	x
1	2	3	4	Close proximity to schools / shops / entertainment	1	2	3	4	x
1	2	3	4	Close proximity to train / streetcar / bus	1	2	3	4	x

GEOGRAPHIC PREFERENCES

13. Please mark "X" on the map approximately where you live.

14. Using the numbered areas on the map, where do you work?

Area # _____ (Insert Number) OR ☐ Area outside city not shown on map OR ☐ Not employed

15. Using the areas on the map, where do you do most of your grocery shopping? Area # _____ (Insert number)

16. Using the areas on the map, where do you make most of your major retail purchases (general merchandise, apparel, specialty goods, etc.)? Area # _____ (Insert number)

17. If you were to move from your current home to a different location, what areas on the map would you be most likely to move to?

1st Choice

_____ (Insert number)

2nd Choice

_____ (Insert number)

3rd Choice

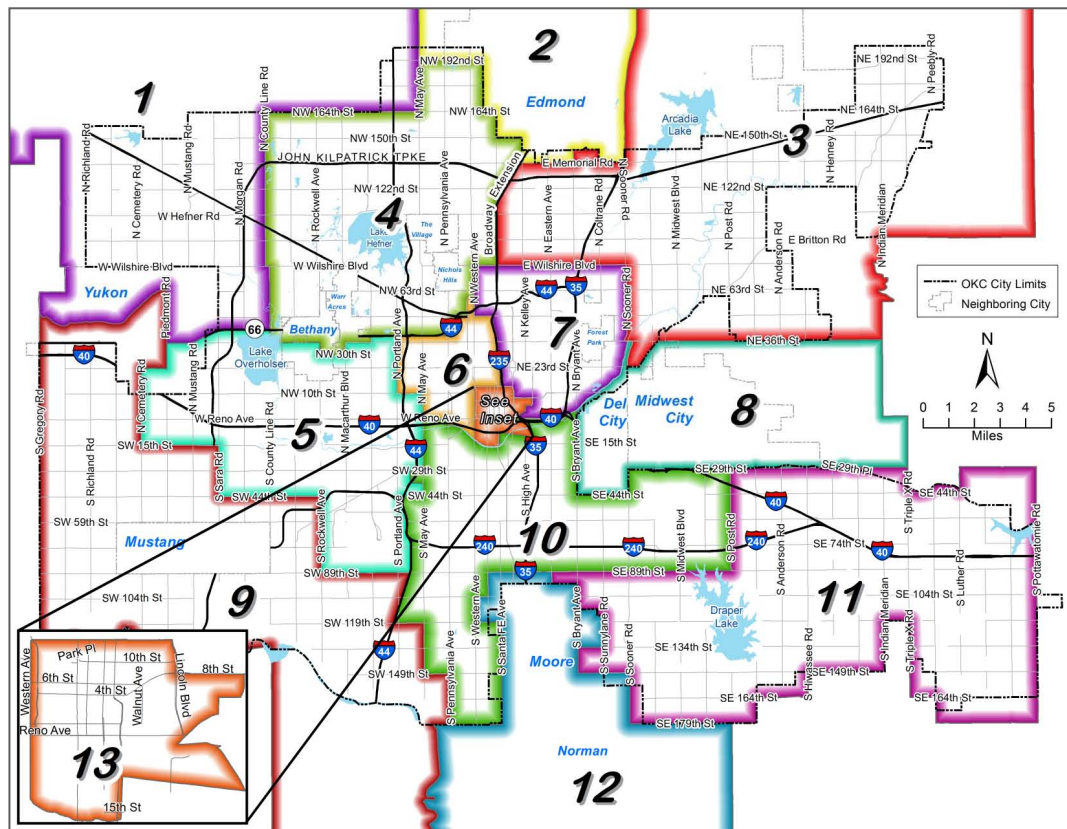
_____ (Insert number)

4th Choice

_____ (Insert number)

18. On the map, where would you most like to live if your decision were NOT affected by the choice of school quality?

_____ (Insert number)



HOUSING IMAGE PREFERENCES

The following six images show types of housing that may or may not be currently available in Oklahoma City. How desirable is this type of home for you and your family? Using the scale please provide your reaction by rating each image from -5 to 5. (CIRCLE YOUR SELECTIONS)

Mid-Rise Multi-Family										
										
Very Undesirable	Somewhat Undesirable		Neutral		Somewhat Desirable		Very Desirable			
-5	-4	-3	-2	-1	0	1	2	3	4	5

Mid-Rise Multi-Family										
										
Very Undesirable	Somewhat Undesirable		Neutral		Somewhat Desirable		Very Desirable			
-5	-4	-3	-2	-1	0	1	2	3	4	5

Low-Rise Multi-Family										
										
Very Undesirable	Somewhat Undesirable		Neutral		Somewhat Desirable		Very Desirable			
-5	-4	-3	-2	-1	0	1	2	3	4	5

Duplex										
										
Very Undesirable	Somewhat Undesirable		Neutral		Somewhat Desirable		Very Desirable			
-5	-4	-3	-2	-1	0	1	2	3	4	5

Traditional Single-Family										
										
Very Undesirable	Somewhat Undesirable		Neutral		Somewhat Desirable		Very Desirable			
-5	-4	-3	-2	-1	0	1	2	3	4	5

Small Lot Single-Family										
										
Very Undesirable	Somewhat Undesirable		Neutral		Somewhat Desirable		Very Desirable			
-5	-4	-3	-2	-1	0	1	2	3	4	5

Please provide any additional comments you may have regarding the six housing images in the space provided below:

ABOUT YOUR HOUSING PREFERENCES

19. For each period, please tell us how likely you think you are to move.

	<u>Very unlikely</u>	<u>Somewhat unlikely</u>	<u>Somewhat likely</u>	<u>Very likely</u>
Next 1 – 5 Years	☐	☐	☐	☐
6 – 10 Years	☐	☐	☐	☐
10 – 20 years	☐	☐	☐	☐

20. For each period, please tell us where you are most likely to move.

	<u>Stay in my current home, don't plan on moving</u>	<u>Move within OKC region</u>	<u>Move outside OKC region</u>	<u>Don't Know</u>
Next 1 – 5 Years	☐	☐	☐	☐
6 – 10 Years	☐	☐	☐	☐
10 – 20 Years	☐	☐	☐	☐

The next sequence of questions asks you to think about the future and your decisions concerning what you might pay for housing.

21. Following your next move, approximately how much do you think you will be paying per month on a mortgage or to rent?

- | | |
|--|--|
| ☐ Less than \$500 | ☐ \$2,000 - \$2,499 |
| ☐ \$500 - \$999 | ☐ \$2,500 - \$3,000 |
| ☐ \$1,000 - \$1,499 | ☐ More than \$3,000 |
| ☐ \$1,500 - \$1,999 | |

22. On a scale of 1 to 5 where 1 is “not very likely” and 5 is “very likely,” how likely are you to pay 10% more per month on housing to achieve the following? *(RATE EACH CATEGORY INDEPENDENT OF ONE ANOTHER)*

Would pay 10% more to:	Not very likely		Neutral		Very likely
a. Cut your commute time in half	1	2	3	4	5
b. Have the ability to walk and/or bike to shops/restaurants/entertainment	1	2	3	4	5
c. Have the ability to walk and/or bike to work	1	2	3	4	5
d. Have higher quality schools	1	2	3	4	5
e. Live close to recreational parks and trails	1	2	3	4	5
f. Live near daycare or childcare facilities	1	2	3	4	5

23. Would you be very likely to pay 20% or more to achieve any of the categories listed above?

- ☐ Yes _____, _____, _____ (insert the letter[s] from above)
- ☐ No

24. In addition to your current mortgage or rent, how much more per month would you be willing to pay to have some combination of most of the characteristics listed above?

- | | |
|--|--|
| ☐ Less than \$100 | ☐ \$400 - \$499 |
| ☐ \$100 - \$199 | ☐ \$500 - \$600 |
| ☐ \$200 - \$299 | ☐ More than \$600 |
| ☐ \$300 - \$399 | |

25. If you plan to move, will your next home be:

- | <u>Size</u> | <u>Own/Rent</u> |
|------------------------------------|--|
| ☐ Larger | ☐ Own |
| ☐ Smaller | ☐ Rent |
| ☐ Same size | ☐ Indifferent |
| | ☐ Other arrangement
(please describe)
_____ |

26. How do you anticipate your household changing in the future? (CHECK ALL THAT APPLY)

<u>1-5 YEARS</u>	<u>6-10 YEARS</u>	<u>10-20 YEARS</u>	
1 ☐	☐	☐	Unlikely to change
2 ☐	☐	☐	Change in marital status
3 ☐	☐	☐	Have children (more children)
4 ☐	☐	☐	Children will leave home
5 ☐	☐	☐	Elderly parent will move in
6 ☐	☐	☐	Add/Acquire roommates
7 ☐	☐	☐	Will lose roommates
8 ☐	☐	☐	Other _____

27. Do you plan to retire sometime in the next 20 years?

- ☐ Yes
☐ No
If yes, approximately in what year? _____

28. For each period, please mark your first and second housing choices. (MARK A 1 FOR YOUR FIRST CHOICE AND A 2 FOR YOUR SECOND CHOICE IN EACH TIMEFRAME)

RANK YOUR TOP 2 FOR
EACH PERIOD

<u>1-5 YEARS</u>	<u>6-10 YEARS</u>	<u>10-20 YEARS</u>	
—	—	—	Traditional single-family
—	—	—	Single-family small lot
—	—	—	Townhome
—	—	—	Duplex
—	—	—	Apartment
—	—	—	Mobile home
—	—	—	Condominium
—	—	—	Loft
—	—	—	Other _____

29. (OPTIONAL) What would it take for you to move to a more central location, but not necessarily downtown?

A FEW FINAL QUESTIONS ABOUT YOU AND YOUR HOUSEHOLD

Please remember that this survey is CONFIDENTIAL.

30. How long are the daily commute times for the members of your household?

- You _____minutes OR ☐ NA
2nd Employed Person _____minutes OR ☐ NA

31. What is your household's combined gross annual income (before taxes)?

- ☐ Less than \$25,000
☐ \$25,000 to \$49,999
☐ \$50,000 to \$74,999
☐ \$75,000 to \$99,999
☐ \$100,000 to \$149,999
☐ \$150,000 or more

32. What is your total monthly rent or mortgage (excluding utilities)?

\$_____ per month

33. What year were you born? _____

34. Do you have any additional comments or suggestions concerning housing choices in Oklahoma City?

THANK YOU FOR YOUR PARTICIPATION!

If you are interested in participating in an additional Image Assessment Survey that will help to shape how the city looks in the future, please provide your email address (or mailing address if you prefer to be contacted by mail).

