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2014 Home Location Preference Survey

Understanding where GTA residents prefer to live and commute

September 2014

*2014 Home Location Preference Survey: Understanding where
GTA residents prefer to live and commute*

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Executive Summary

This report by the Pembina Institute and the Royal Bank of Canada (RBC) examines homebuyers' preferences for home location attributes in the Greater Toronto Area (GTA). It presents the findings of a survey conducted by Environics Research Group in May 2014.

The survey asked a series of questions to gauge respondents' preferences for location-related attributes — such as walkability, commute times, home size and neighbourhood — when choosing a home. It builds on a previous survey conducted in 2012 by RBC and Pembina that explored these preferences. This year's survey also explores the importance of home prices and transportation costs when making home location choices.

Key findings

1. GTA homebuyers prefer walkable, transit-friendly neighbourhoods to car-dependent locations

- When housing costs are not a factor, 81% of respondents would choose to live in an urban or suburban neighbourhood where they can walk to stores, restaurants and other amenities, and where they can access frequent rapid transit. They would choose these neighbourhoods even if it meant trading a large house and yard for a modest house, townhouse or condo.
- We found the same result in our 2012 survey, suggesting that this is a strong and stable preference.

What is location efficiency?

- Convenient distance from workplaces, amenities, stores and urban hubs
- Access to rapid transit
- Shorter commuting times
- Realistic opportunities to walk, cycle or take transit to the places where you go, work and play every day

2. Most homebuyers choose a location based on price rather than preferences

- Affordability is a primary consideration; over 80% of respondents choose a neighbourhood because that is where they can afford a home.

3. Walkable, transit-friendly suburbs are becoming more popular

- When the cost of housing is not a factor, only 19% of respondents would choose a suburban location with a large home and yard, but where a car is required and commuting takes more than 30 minutes.
- By contrast, 42% of respondents would choose a modest house, townhouse or condo in an urban or suburban location that is walkable, and where it is possible to commute by rapid transit. This is a slight increase from 39% in our 2012 survey.

4. All age groups and family types prefer location-efficient living

- If cost were not an issue, all age groups would prefer to live in a location-efficient city or suburb, with 82% of respondents over 60 and 84% under 35 exhibiting that preference.

- Seniors and young people would pay a higher price to live in a walkable, transit-friendly neighbourhood, even if it means giving up a larger detached home and yard. The same is true of families with one child or less.
- Only 40% of families with three or more children would prefer a large house in a car-dependent suburb in the 2014 survey, and 51% would choose a location-efficient suburb.

5. Understanding transportation costs makes homebuyers more likely to choose a walkable, transit-friendly neighbourhood

- Homebuyer preferences shift when they are told that they can save a minimum of \$200,000 over a 25-year period by giving up one household car and walking, biking or taking transit.
- When informed of these savings, 60% of respondents would choose to live in an area with easy access to rapid transit, even if they could only afford a smaller home.
- Only 36% of respondents would choose a larger home in an area without access to rapid transit.

Key conclusions

Having a detached house remains a high priority for many homebuyers. However, their preferences are also strongly driven by location-based attributes: choosing a home is a question of *where* to live, not just *what* to live in.

The results of our survey show that a large house and spacious lot are not as important as living in a neighbourhood that is walkable, mixed-use, transit-connected and that offers shorter commute times. GTA homebuyers would choose a more modestly sized home to enjoy these attributes, both in suburban and urban locations. In fact, the survey finds a clear preference for location-efficient suburbs over those that are car-dependent.

The results of this survey therefore raise questions about whether we are building the kinds of developments and neighbourhoods in which people will want to live.

Introduction

This survey examines preferences for home location attributes in the GTA. It presents the findings of an online survey of 1,014 residents of the area conducted by Environics Research Group in May 2014.¹

The survey asked respondents questions regarding their preferences for location-related attributes of homes — such as walkability, proximity to rapid transit and commuting times — as well as house size, house type and yard size. The questions also explored how both home prices and transportation costs influence these preferences and choices.

This survey is a follow-up to the *RBC-Pembina Home Location Study* published in 2012. Many of the questions from the 2012 study have been repeated to test consistency and allow for comparisons.

Examining location preferences

We did not examine location in terms of the preference to live in a specific town or city. Our survey looks at the different attributes of neighbourhoods and housing options within any given municipality. For example, the survey explores the relative preference for large detached houses in the urban and suburban areas, compared to smaller homes in location-efficient neighbourhoods, in both the city and suburbs.

Location-efficient neighbourhoods are more walkable and thus may have smaller lot sizes, along with the associated differences in privacy. Our survey explores these trade-offs, and where GTA homebuyers' preferences land on this spectrum of options.

Location efficiency

For the purposes of this survey, “location efficiency” is used as an overarching term that encompasses several location-related attributes. These include:

- **Walkability:** the ability to walk or cycle to stores, restaurants and other amenities
- **Mixed-use neighbourhoods:** a mix of residential homes, businesses and amenities all within walking distance, rather than just one or the other
- **Convenient access to rapid transit and shorter commute times,** along with realistic opportunities to travel to work and other key destinations without a car

In a neighbourhood or home that is not location-efficient, residents generally require a car to get around. Often these car-dependent areas are dominated by residential homes, rather than being mixed-use with commercial developments. The only realistic option for commuting to work or key destinations is driving. If transit is available in these locations, it consists of buses running in mixed traffic.

What is location efficiency?

- Convenient distance from workplaces, amenities, stores and urban hubs
- Access to rapid transit
- Shorter commuting times
- Realistic opportunities to walk, cycle or take transit to the places where you go, work and play every day

¹ The methodology and results of the survey are presented in the Appendix.

Urban and suburban location-efficient choices

The survey does not directly compare preferences for living in an urban versus suburban environment. Rather, it looks at preferences for key attributes within those locations. This report uses the term “city” as a synonym for Toronto or downtown Toronto, while “suburb” refers to both the inner suburbs within metropolitan Toronto (for example, Scarborough and Etobicoke) as well as the regions in the GTA surrounding Toronto (York, Durham, etc.).

Location-efficient neighbourhoods are not restricted to downtown Toronto. For example, Markham is becoming more walkable and growing both residentially and commercially. This mixed-use growth makes it easier to live and work in the same community. New developments in the town’s centre are taking the form of denser mid-rise and high-rise buildings, and bus rapid transit is being built, which contributes to location efficiency.

Many other centres in the GTA, from Aurora to Burlington, have neighbourhoods that are easily accessible by GO train. This provides commuters with the option of taking the GO train to work and enjoying a walkable neighbourhood outside the urban core — another location-efficient option outside downtown Toronto.

General findings

Our 2014 survey finds that most homebuyers would prefer to live in a city or suburb with location-efficient characteristics. These findings are consistent with those of our 2012 study, indicating that these preferences are stable.

The relative cost of a home remains an important factor for homebuyers when choosing where to live. However, when cost is not a consideration, most respondents would choose a modestly sized house, townhouse or condo in a neighbourhood that is walkable and close to transit. They would be willing to give up a more spacious home or yard for this convenience.

The general findings of the 2014 survey are as follows:

1. GTA homebuyers prefer walkable, transit-friendly neighbourhoods to car-dependent locations

Survey respondents were asked to imagine that they are moving to another home. They were asked to select one of three location options for that home, assuming that the cost of housing in each was equally affordable. The location descriptions and survey responses are presented in *Table 1*.

Fully 81% of respondents would choose to live in a modest house, townhouse or condo in a city or suburb — specifically, one with access to frequent rapid transit and where they can walk to stores, restaurants and other amenities. Only 19% would choose to live in a suburb where detached homes on large lots are available but they would be farther from work and would need a car to get around. This is consistent with our 2012 survey findings.

Table 1: Preferred home location, assuming equal home costs

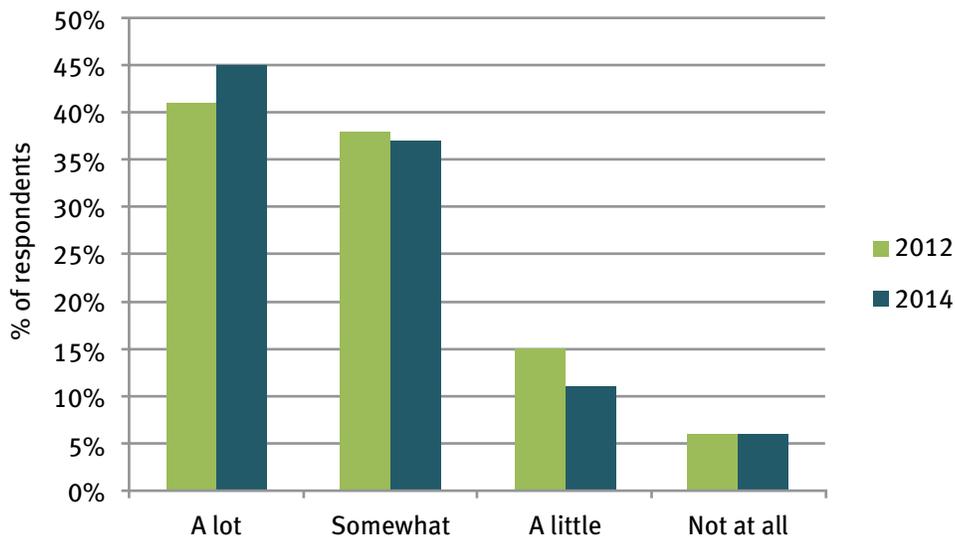
Car-dependent suburb		Location-efficient suburb		Location-efficient city	
2012	2014	2012	2014	2012	2014
18%	19%	39%	42%	42%	39%
Detached house on a large private lot		Detached house on a modest lot, townhouse or condo		Condo, townhouse or modest house on a smaller lot	
Far from the town or city centre; need car to get to most destinations		Suburban location where you can walk or bike to stores and amenities in the local town centre		In a city with easy access to stores and amenities	
Commute to work of more than 30 minutes, with no access to fast transit		Commute to work of more than 30 minutes, but with access to rapid transit such as the GO Train		Commute to work of less than 30 minutes and possible to get to work by bike, walking or transit	

2. Most homebuyers choose a location based on price rather than preferences

Because there is a lack of affordable location-efficient homes, homebuyers often are forced to move into car-dependent suburbs. Our findings show that the impact of affordability on homebuyers' decisions may be increasing.

- 82% of respondents live where they do because that is the neighbourhood where they can afford a home.
- 45% said that affordability affected their choices “a lot,” up from 41% in 2012. Only 11% said “a little,” down from 15% in 2012.

Figure 1: Impact of affordability on respondents' decisions about where to live



3. Walkable, transit-friendly suburbs are becoming more popular

GTA residents are looking for more walkable and transit-friendly suburbs — they want their suburban neighbourhoods to be more like the neighbourhoods of Toronto. This highlights the need to plan and develop suburbs that provide the lifestyle that homebuyers want today and tomorrow.

- When the cost of housing is not a factor, only 19% of respondents would choose a rural or suburban location with a large home and yard, but where a car is required and commuting takes more than 30 minutes (see *Table 1*).
- By contrast, 42% of respondents would choose a modest house, townhouse or condo in a *suburb* that is walkable, and where it is possible to commute on rapid transit. This is a slight increase from 39% in our 2012 survey.
- 39% of respondents would choose a condo, townhouse or modest house on a smaller lot in the city where it is possible to commute to work in less than 30 minutes.

Respondents were also asked a more general question about the type of neighbourhood they would most like to live in, choosing between five possible options (see *Table 2*). Our goal was to better understand preferences for suburban, urban and rural living. We found that respondents overwhelmingly prefer walkable, mixed-used neighbourhoods with access to frequent rapid transit, be they in the suburbs or urban residential areas.

Table 2: Preferred neighbourhood type, assuming equal home costs

% of respondents	Location
18%	City: downtown with a mix of offices, apartments and shops
31%	City: a more residential neighbourhood
31%	Suburban neighbourhood with a mix of houses, shops and businesses
12%	Suburban neighbourhood with houses only
7%	Rural area where a car is needed to get to amenities

4. The combination of walkability, commuting times and rapid-transit access matters more to GTA homebuyers than having a detached house

As part of the survey, respondents were provided with a list of considerations when choosing a home. They were asked to identify which attributes matter the most and least to them.

The results (presented in *Table 3*) show that there is a clear preference for detached single-family homes, as this was the top consideration. However, having a spacious home or lot scored much lower on the list of attributes. Of the three most important considerations, two involved *where* a home is located: walkability and having a shorter commute to work.

The ideal location for most homebuyers would therefore be a detached house in a location-efficient neighbourhood, either urban or suburban.

Table 3: Most important attributes when choosing where to live, ranked by preference

Ranked most important	Attribute
14.6%	Living in a detached single-family home
12.9%	Easy walking distance to shops, restaurants and other services
12.8%	Your commute to work is less than 30 minutes one way
11.7%	Easy access to frequent rapid transit (such as subway, GO Train or streetcar)
11.5%	Privacy from neighbours
10.2%	You can get to work other than by driving (e.g. take transit, walk or cycle)
10.1%	Spacious lot/backyard
9.8%	Large/spacious house

5. Understanding transportation costs makes homebuyers more likely to choose a walkable, transit-friendly neighbourhood

For the 2014 survey, we added questions about the cost of commuting. We wanted to see what happens when homebuyers are informed of the full cost of car ownership over the term of their mortgage.

As part of the survey, we informed respondents that they can save a minimum of \$200,000 over a 25-year period by giving up one household car. When provided with this information, 60% of respondents would choose to live in an area with easy access to rapid transit. They would make this choice even if they could only afford a smaller home (see *Figure 2*). Only 36% of respondents would choose to live where there is no access to transit, but where they could afford a larger home.

Figure 2: Preferred home location when informed of the savings from giving up one car

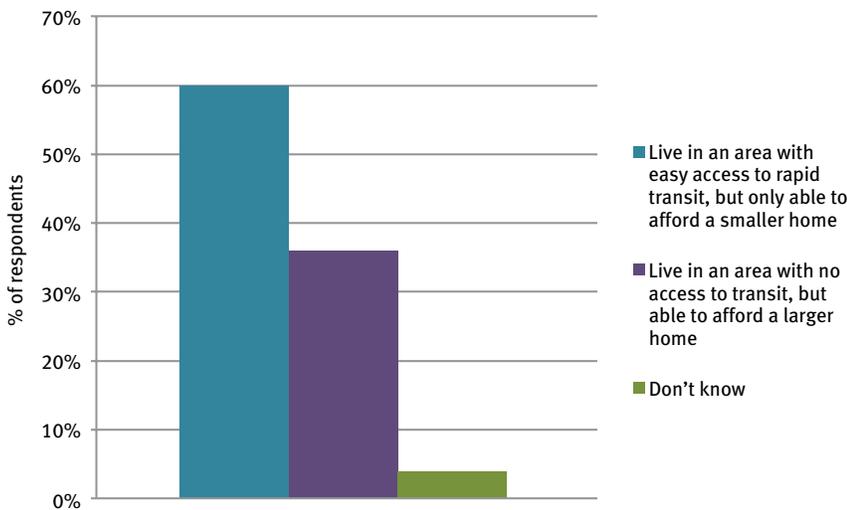


Table 4 presents the results of a similar question where respondents were informed that the annual cost of car ownership is about \$10,000 and then asked where they would choose to live. The majority of respondents would choose to have access to rapid transit, but still own a vehicle. Ultimately, homebuyers want to have the option of driving, but do not want to be dependent on a car.

Table 4: Preferred home location when informed of the cost of owning and operating a vehicle, assuming equal home costs

Option A	Option B	Option C
17%	56%	27%
I would prefer to live where I have the option to take good transit, walk or bike to work and most destinations, and do not own or lease a vehicle.	I would prefer to live where I have the option to take good transit, walk or bike to work and most destinations, but still own or lease a vehicle.	I would prefer to own or lease a vehicle and drive to work and most destinations, regardless of the transit, walking or biking options available to me.

Demographic analysis

This section explores the relationships between location preferences and demographic factors.

If cost were not a consideration, all of the demographic segments we analyzed would prefer to live in location-efficient neighbourhoods. However, there is some variation among these groups when it comes to choosing a location-efficient city versus suburb.

1. All age groups and family types prefer location-efficient living

All of the demographic segments in our analysis prefer location-efficient neighbourhoods, although they express varying preferences for the city versus suburbs. The two demographic factors that most strongly influence this preference are marital status and the number of children in a household, as can be seen in *Table 5*.

Table 5: Preferred home location by demographic segment, assuming equal home costs

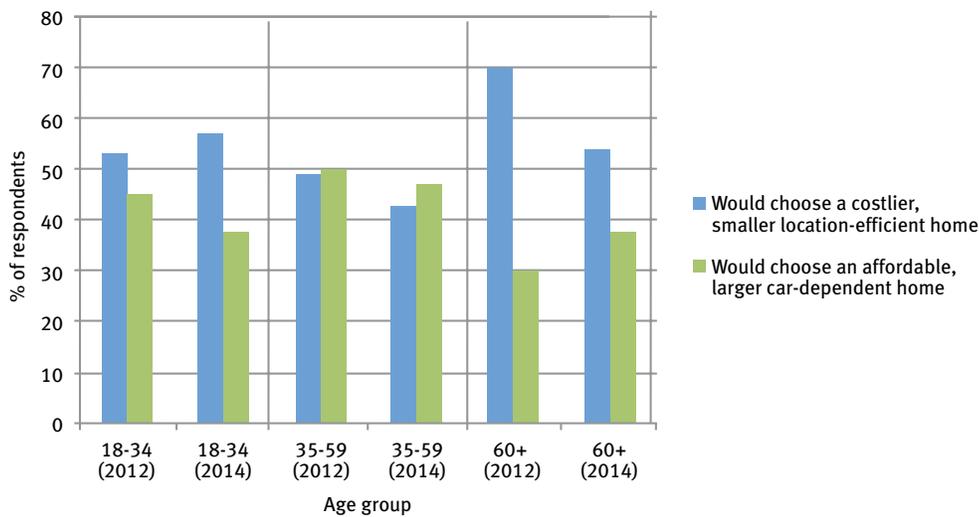
Demographic segment	Car-dependent suburb (large home and yard)	Location-efficient suburb (walkable and transit-accessible, smaller home)	Location-efficient city (walkable and transit-accessible, smaller home, shorter commute)
Marital status: separated/divorced	18%	26%	56%
Marital status: single	11%	36%	53%
No children in home	17%	35%	48%
Marital status: widowed	14%	40%	46%
Age: 60 and over	19%	36%	46%
Age: 18-34	16%	41%	43%
Two children in home	17%	52%	31%
Three or more children in home	40%	51%	9%
Age: 35-59	22%	46%	32%
Marital status: married/common-law	22%	46%	31%
One child in home	21%	45%	34%

All age groups prefer neighbourhoods with location-efficient attributes when housing costs are equal. This preference is particularly strong at the two opposite ends of the age spectrum, with 82% of respondents over 60 and 84% under 35 choosing location efficiency.

2. Seniors and young homebuyers are the most willing to pay more for location efficiency

When price is factored into their decisions, respondents aged 35-59 express the weakest preference for higher-cost, location-efficient homes. However, both respondents over 60 under the age of 35 would pay more for a smaller home that is in a location-efficient neighbourhood. This finding is consistent with our 2012 results, though all age groups have become more sensitive to home costs since the last survey (see *Figure 3*).

Figure 3: Preferred location by age, with home costs taken into account



3. All age groups would choose a smaller home that reduces transportation costs

The trade-off between location and home size changes once again when respondents are informed of the costs of owning and operating a vehicle.

Towards the end of the survey, respondents were told that giving up one car could save them a minimum of \$200,000 over a 25-year period. They were also told that having access to rapid transit makes it possible to give up a car and save money. After being given this information, respondents were asked to choose between:

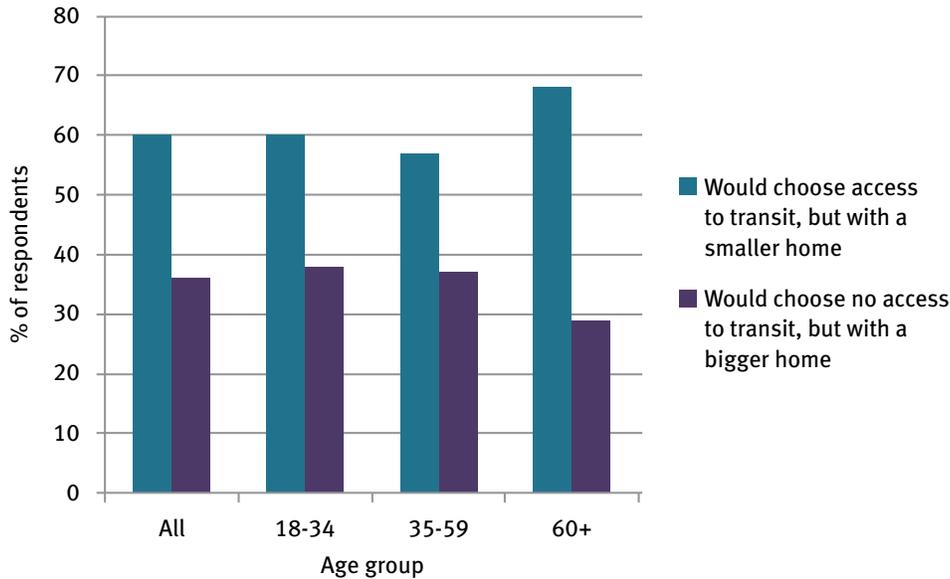
- Living in a location with access to rapid transit, but only being able to afford a smaller home

or

- Living in an area with no access to transit, but being able to afford a larger home

Most respondents chose a location with access to rapid transit, making the trade-off for a smaller home (see *Figure 4*). This preference was visible among all age groups, although it was strongest among seniors, possibly because they have lower driving and car ownership rates.

Figure 4: Trade-off between home size and transit access by age

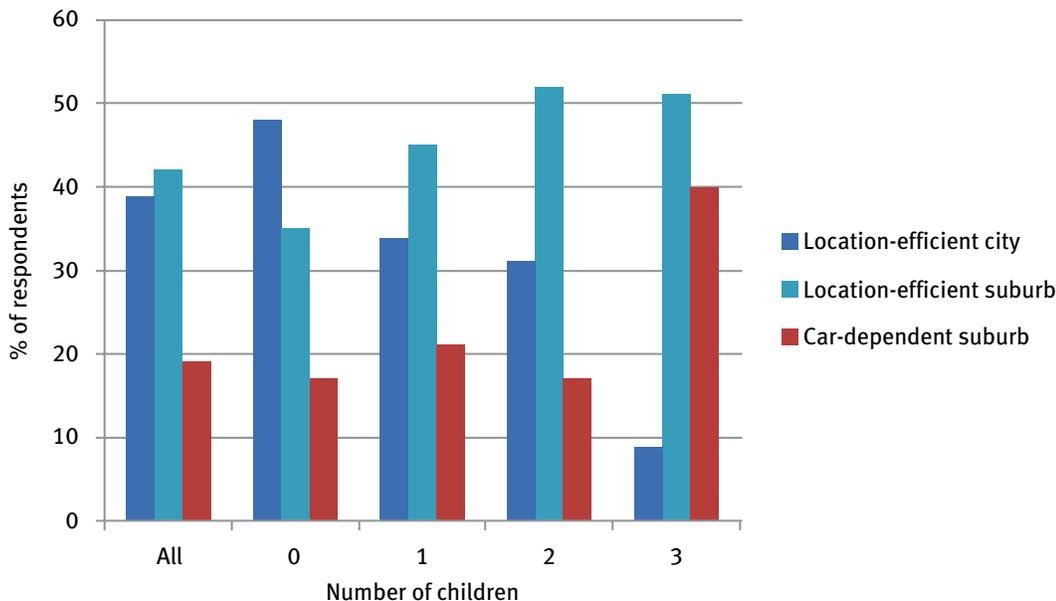


4. Larger families prefer larger homes

The presence and number of children in a family is one of the strongest factors influencing where homebuyers choose to live. This is especially true when home cost is a consideration.

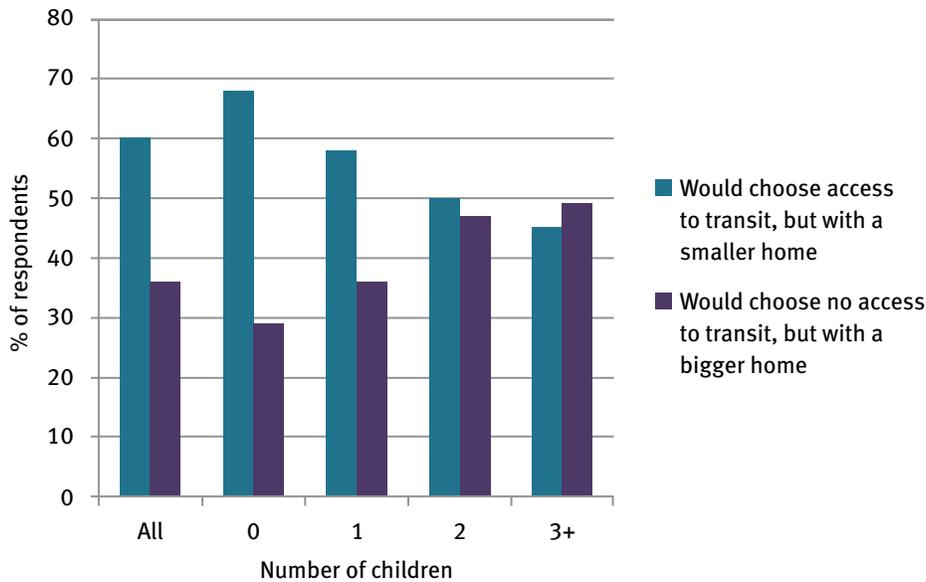
In our 2012 survey, families with three or more children were the only demographic group that preferred to live in larger, car-dependent suburban homes far from the city centre, even assuming equal home costs (51% chose that option). However, this changed in the 2014 survey. Now, only 40% of families with three or more children would choose a larger house in a car-dependent suburb, while 51% would prefer a location-efficient suburb, assuming equal costs.

Figure 5: Preferred home location by number of children, assuming equal home costs



Larger families are more likely to depend on cars regardless of location because they need to transport more children, which may play a role in these preferences. *Figure 6* shows how the option to take transit and save on transportation costs is less compelling for these respondents. Nevertheless, only the largest families (three or more children) would choose a larger home and the cost of car ownership over transit access.

Figure 6: Trade-off between home size and transit access by number of children



Our findings show that families with three or more children are the most likely to choose locations with larger, cheaper homes but higher transportation costs. However, this is the least common family size in the GTA — it encompasses only 11% of families — and this demographic segment is shrinking compared to families with fewer children.¹

5. First-time homebuyers have similar preferences, but costs matter more

First-time homebuyers demonstrate similar preferences to the overall group of GTA homebuyers, as is shown in *Table 6*. When cost is a factor, 50% of first-time homebuyers would pay more for a smaller, location-efficient home, while 41% would opt for a larger, cheaper, car-dependent home. This is comparable to the general population.

Even when cost is not a factor, the preferences of first-time homebuyers remain comparable to those of the overall group. First-time homebuyers are more concerned with affordability than other homebuyers.

² The 2011 census saw a 4% proportionate drop in the ratio of families with three or more children in the GTA (Toronto and Oshawa census metropolitan areas) as compared to the 2006 census. This is consistent with the trend from 2001 to 2006, when there was a 12% decline.

Table 6: First-time homebuyers compared to all respondents on key considerations

Consideration	All respondents	First-time homebuyers
Affordability influences location “a lot” or “somewhat”	82%	86%
Prefer location-efficient suburb or city if costs were equal	81%	81%
Accounting for cost, would choose a smaller, costlier location-efficient home	50%	50%
Accounting for cost, would choose a cheaper, larger car-dependent house	42%	41%
Would prefer to live near transit to save money on transportation/give up one car	60%	57%

Conclusions

Where you live is as important as the house you live in

While a detached home is still a high priority for many homebuyers, their preferences are also strongly driven by location. GTA homebuyers are thinking about *where* to live, and not just *what* to live in. A large house with a spacious lot is not as important to homebuyers as living in a location-efficient neighbourhood with all of the benefits that it provides.

GTA homebuyers would trade a large home and yard for a location-efficient neighbourhood

The results of our survey show that a large house and spacious lot are not as important as living in a neighbourhood that is walkable, mixed-use, transit-connected, and that offers shorter commute times. GTA homebuyers would choose a more modestly sized home to enjoy these attributes, both in the suburbs and in the city.

Cost pushes homebuyers out to car-dependent neighbourhoods

If cost was not a factor, respondents would prefer to live close to where they go every day. Our 2014 results show that affordability is having an even greater influence on homebuyer decisions than in 2012. This seems logical, given that home costs have been rising: the average home price in the GTA increased by over 12% since May 2012.¹

The largest and fastest-growing demographic groups prefer location-efficient neighbourhoods

All of the demographic groups we analyzed prefer location-efficient living. These preferences are not necessarily reflected in the housing development market. Seniors are the fastest-growing age demographic in Ontario, whereas large families are growing most slowly. The results of this survey therefore raise questions about whether we are building the kinds of developments and neighbourhoods in which people want to live, and which reflect the region's current and future demographic makeup.

GTA residents want their suburbs to be more like city neighbourhoods

Our findings show that preferences are not driven by a neighbourhood being in the city versus in the suburbs, but rather by attributes available in both areas. There is a strong preference for location-efficient suburbs over those that are car-dependent.

In effect, GTA residents would like to have it all: a large detached house, plus the attributes of urban living, such as mixed-use neighbourhoods where it is possible to get around by walking, cycling or taking transit. However, residents are willing to compromise on house size and type in order to live in a location-efficient neighbourhood.

¹ According to the Toronto Real Estate Board, the average GTA home price was \$514,567 in May 2012 and \$577,898 in April 2014. This survey was conducted in May 2014, and our previous survey was conducted in May 2012.

Awareness of commuting costs influences preference for walkable, transit-friendly neighbourhoods

Because of the high cost of homes in the GTA's location-efficient neighbourhoods, many homebuyers are driven to more affordable homes in car-dependent suburbs. However, they may not be aware of how the cost of operating two cars adds up over the lifetime of a mortgage. When homebuyers learn that giving up one car could save them \$200,000 over a 25-year period, the majority opt for a transit-accessible home location, even if the home is smaller.

This reinforces the need to build more compact, transit-served developments in suburbs that can accommodate families. It also suggests that homebuyers are not fully aware of the lifetime transportation costs of their housing choices.

Appendix: Survey details

A.1 Survey methodology

This report presents the findings of an online survey conducted by Environics Research Group, with a sample of 1,014 adults 18 years of age or older living in the Greater Toronto Area (GTA), between May 20 and 27, 2014. Note that the methodology for the 2014 survey is consistent with the 2012 survey (including the research timing) to ensure that accurate comparisons can be made.

Respondents were selected from a group that has registered to participate in Environics' online surveys. The data have been weighted by age and gender within GTA regions and by household composition (with or without children) to reflect the demographic composition of the adult GTA population. Because the sample is based on those who initially self-selected for participation in the online panel, rather than a probability sample, no estimates of sampling error can be calculated. However, a probability sample of this size would yield a margin of error of plus or minus 3.1 percentage points, 19 times out of 20.

A.2 Survey results

The first four questions, not included here, were a screening question and a series of demographic, home-ownership and commuting questions used in cross tabulations.

5. Which of the following best describes the location where you currently live?

2012	2014	
13%	12%	City – downtown, with a mix of offices, apartments and shops
28%	33%	City – a more residential neighbourhood
34%	36%	Suburban neighbourhood with a mix of houses, shops and businesses
22%	16%	Suburban neighbourhood with houses only
3%	3%	Rural area where a car is needed to get to amenities

5a. (For respondents who own or rent a home) How much did affordability of the neighbourhood influence your decision about where to live?

2012	2014	
41%	45%	A lot
38%	37%	Somewhat
15%	11%	A little
6%	6%	Not at all
951	914	<i>Number of respondents</i>

6. In which of the following locations would you most like to live if the cost of housing was the same in all of them?

2012	2014	
20%	18%	City – downtown with a mix of offices, apartments and shops
30%	31%	City – a more residential neighbourhood
29%	31%	Suburban neighbourhood with a mix of houses, shops and businesses
13%	12%	Suburban neighbourhood with houses only
8%	7%	Rural area where a car is needed to get to amenities

7. Different people choose their home for different reasons. Below is a list of considerations when choosing where you live. Please select which is “Most Important” and which is “Least Important” to you when choosing a home.

(This table shows the percentage of respondents who identify that consideration as most important.)

2012	2014	
14.7%	14.6%	Living in a detached single-family home
13.0%	12.9%	Easy walking distance to shops, restaurants and other services
13.3%	12.8%	Your commute to work is less than 30 minutes one way
10.7%	11.7%	Privacy from neighbours
11.0%	11.5%	Easy access to frequent rapid transit (such as subway, GO Train or streetcar)
10.2%	10.2%	Spacious lot/backyard
10.2%	10.1%	Large/spacious house
9.5%	9.8%	You can get to work other than by driving (e.g. take transit, walk or cycle)
7.3%	6.4%	Living in a place that’s at the centre of it all

8. Imagine for a moment that you are moving to another home. Of the following three options, please select the location where you would prefer to live if the cost of housing in each was equally affordable to you.

Option A		Option B		Option C	
2012	2014	2012	2014	2012	2014
18%	19%	39%	42%	42%	39%
Detached home on large private lot Far from the town or city centre and need car to get to most destinations Commute to work of more than 30 minutes, with no access to fast transit		Detached house on a modest lot size or a townhouse or condo Suburban location where you can walk or bike to stores and amenities in the local town centre Commute to work of more than 30 minutes, but with access to rapid transit such as the GO Train		Condo, townhouse or modest house on a smaller lot In a city with easy access to stores and amenities Commute to work of less than 30 minutes and possible to get to work by bike, walking or transit	

9. Taking cost into account, which of the following best describes your preference for where you choose to live?

2012	2014	
54%	50%	You would prefer to live in a neighbourhood where you can walk to stores, restaurants and other amenities, and have good access to fast transit, despite the higher cost to rent or own
44%	42%	You would prefer to live in a neighbourhood where you have more space/a bigger home/lot for a lower cost, despite having to drive to work and most other destinations
1%	8%	Don't know or not applicable

A.3 New questions

10. The average vehicle costs about \$10,000 to own and operate every year. Knowing this, which of the following three options would you prefer if the cost of housing in each was equally affordable to you.

Option A	Option B	Option C
17%	56%	27%
I would prefer to live where I have the option to take good transit, walk or bike to work and most destinations, and do not own or lease a vehicle	I would prefer to live where I have the option to take good transit, walk or bike to work and most destinations, but still own or lease a vehicle	I would prefer to own or lease a vehicle and drive to work and most destinations, regardless of the transit, walking or biking options available to me

11. Experts estimate that residents can save a minimum of \$200,000 over a 25-year period by giving up one car and taking transit, biking or walking. Knowing this, which of the following best describes where you would choose to live?

2014	
60%	Live in an area with easy access to rapid transit, but only able to afford a smaller home
36%	Live in an area with no access to transit, but able to afford a bigger home
4%	Don't know or not applicable

12. How many vehicles does your household currently own and/or lease?

	Own	Lease
None	16%	88%
One	49%	10%
Two or more	36%	2%

13. In the past year, have you or has anyone in your household used a car-sharing program, such as car2go, Zipcar or Autoshare?

2014	
7%	Yes
93%	No

**15. What types of public transportation are within 10 minutes walking distance from your home?
(Select all that apply.)**

2014	
44%	Rapid transit (GO Train, subway, right-of-way streetcar in a separate lane or “BRT,” rapid bus separated from traffic in its own lane)
52%	Non-rapid transit in mixed traffic (not in a separate lane) such as a bus or streetcar
11%	None

A.4 Respondent characteristics

16. What is the last level of education you have completed?

2012	2014	
*	*	Elementary school
1%	2%	Some high school
6%	13%	Completed high school
11%	8%	Some community college/technical college/CEGEP
21%	20%	Completed community college/technical college/CEGEP
9%	10%	Some university
32%	31%	Completed university
20%	15%	Post-graduate degree

17. Please indicate your marital status.

2012	2014	
20%	22%	Single, never married
68%	67%	Married or common-law
9%	9%	Separated or divorced
3%	2%	Widowed

18. Including yourself, how many people live in your household?

2012	2014	
13%	13%	One
25%	27%	Two
22%	25%	Three
40%	35%	Four or more

19. (For respondents from multi-person households) And how many children under 18 years of age live in your household?

2012	2014	
(849)	(820)	
36%	39%	None
31%	35%	One
26%	20%	Two
6%	6%	Three or more

20. Are you currently...

2012	2014	
62%	51%	Working full-time (30 hours per week or more)
11%	11%	Working part-time (less than 30 hours per week)
5%	6%	Unemployed or looking for a job
6%	10%	At home full-time
2%	5%	A student
14%	18%	Retired

21. (For respondents who are working) Most days, how do you get to work? If more than one, select the one which takes the most time.

2012	2014	
(746)	(610)	
62%	59%	Car
21%	29%	Public transportation
8%	4%	Walking
6%	6%	Work from home most days
1%	1%	Riding a bike
1%	1%	Something else
*	1%	Don't know or not applicable

22. (For respondents who are working) About how much time does a one-way trip to your job usually take?

2012	2014	
(746)	(610)	
52%	48%	<30 minutes
24%	23%	30-44 minutes
12%	14%	45-59 minutes
12%	14%	60+ minutes
29.2	32.4	Mean trip length (minutes)

23. For statistical purposes only, we need information about your income. All individual responses will be kept confidential. What was your total household income before taxes for 2013?

2012	2014	
13%	16%	Under \$40,000
16%	20%	\$40,001 to \$60,000
19%	22%	\$60,001 to \$80,000
14%	18%	\$80,001 to \$100,000
22%	15%	\$100,001 to \$150,000
14%	8%	More than \$150,000
1%	1%	Don't know or not applicable