Downtown Oklahoma City, Inc.

Downtown Housing Demand Study – Final Report
Oklahoma City, Oklahoma

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CDS Market Research | Spillette Consulting
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DOWNTOWN HOUSING DEMAND STUDY

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Section I

INTRODUCTION AND EXECUTIVE SUMMARY

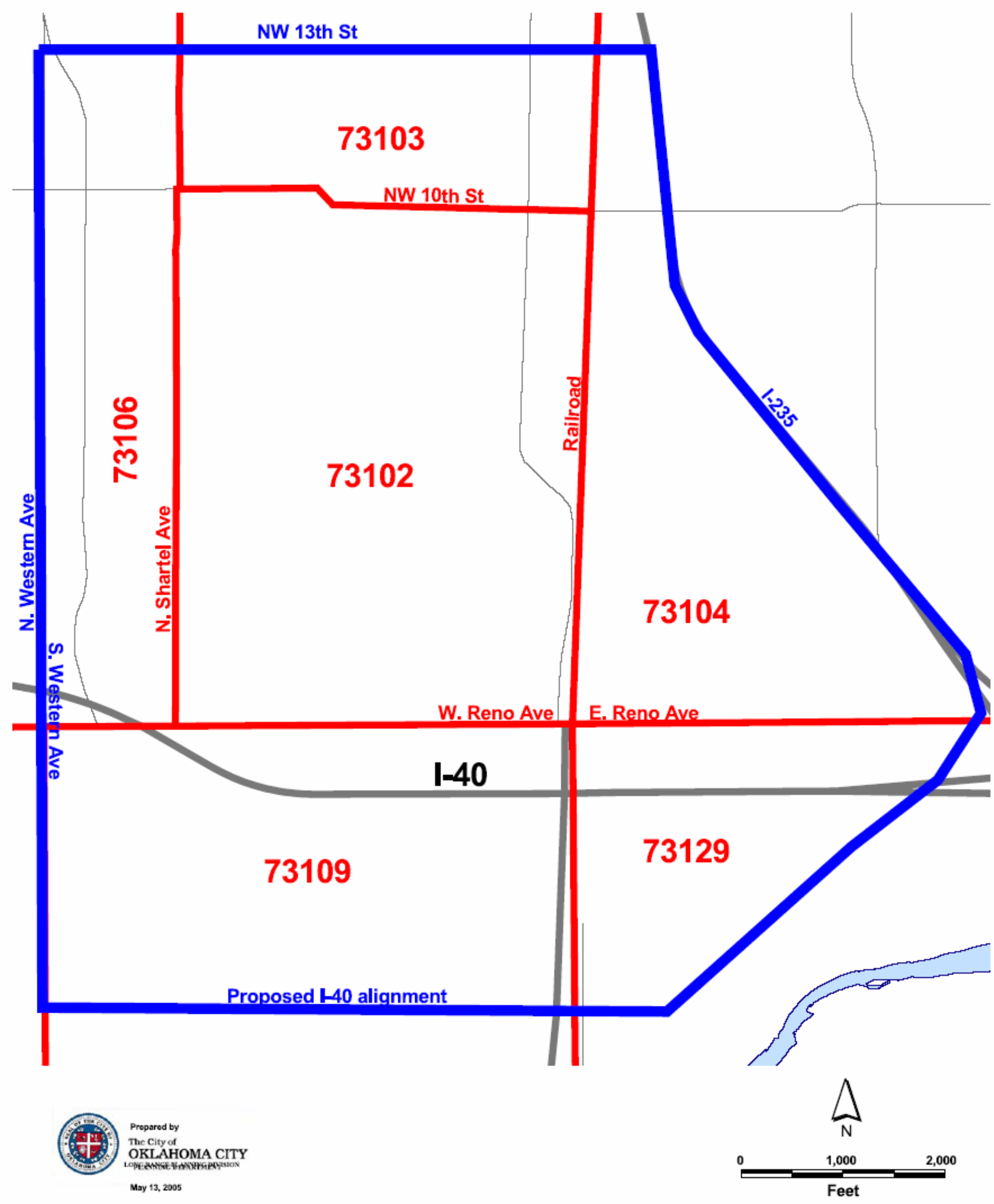
This report represents the findings of a CDS Market Research | Spillette Consulting (CDS | Spillette) performed from April to June of 2005 for Downtown Oklahoma City, Inc. The subject of the study was an assessment of the potential demand for additional housing development in Downtown Oklahoma City. Recent improvements to Downtown, including MAPS projects and the Bricktown area, have engendered a sense of positive momentum in Downtown, and there has also been a very limited amount of new housing development. Various organizations, including Downtown Oklahoma City, Inc., seek to gauge the level of supportable housing development in Downtown to guide future policies, plans, and improvements.

This report contains three additional sections. Section II, Economic and Demographic Trends, compiles and reviews the underlying growth factors that drive the overall housing market in the Oklahoma City region. It also examines employment trends specific to major Downtown-area employers. Section III, Residential Real Estate trends, examines trends in regional housing development and prices for both for-sale and rental products. It also reviews housing development in Downtown specifically with a survey of existing relevant residential projects. It concludes with the results of a Downtown resident survey conducted by CDS | Spillette to better understand the characteristics and motivations of these residents. Section IV evaluates the results of an additional survey of non-Downtown residents to help determine the potential number of households interested in moving Downtown. Using this information and integrating it with the findings presented in Sections II and III, CDS | Spillette then conducts an analysis to project future demand and supportable absorption for additional Downtown housing. An Appendix contains a more detailed report and data from the two consumer surveys.

This report refers to a “Downtown Study Area” used in gathering certain types of demographic and development trend information. This Study Area was defined by Downtown Oklahoma City, Inc. and the City of Oklahoma City and is shown in Figure I-1.

Figure I-1

DOWNTOWN STUDY AREA



ECONOMIC AND DEMOGRAPHIC TRENDS

Employment

The Oklahoma City region has emerged from the 2001-2002 economic slowdown and employment is projected to increase over the next several years. Manufacturing, long a significant factor in the area's job base, continues to decline and is being replaced by the expansive Services sector. Total employment in the region is estimated to be over 540,000 jobs. Projected growth will be strong in various Service sector industries, most notably Health Care, which has a strong Downtown-area presence. The Oklahoma Employment Security Commission projection from 2002 to 2012 shows that the region is expected to add over 68,000 jobs during those ten years. Only a limited number of those jobs, however, are expected to require the college-level education or higher that is typical of high-salaried positions.

Several Downtown-area employers expect significant job growth in the next several years as well. The nearby health care and medical research employers are the most notable in this regard, and will grow both in employment and student population. A large share of new jobs at these Downtown-area employers is anticipated to be filled by young, college-educated workers on salary. Some of these workers will have had experience living in cities where an "urban lifestyle" was an option. Outside Downtown, two other employers anticipated to have growth include Tinker Air Force Base and Dell Computer, which is building a new facility to the southwest of Downtown.

Population, Households, and Income

Population and households are growing with employment. The region is estimated to have over 1.1 million residents in 2005. Through the 1990s, the City of Oklahoma City captured about half of regional population growth, but this share is estimated to have been declining since 2000, with a larger share of growth occurring in the outer suburbs. A marked feature of population trends in the region is the large "baby boomer" population segment, which continues to move into its 50s. A smaller but significant "bulge" in the population is the "echo boomers" who are currently moving into their 30s. The continued aging of the baby boomers is projected to add significantly to the population aged 55 and over for the next fifteen years, while the young adult population is projected to level off. The total population of the Metropolitan Statistical Area (MSA) is projected to reach 1.2 million by 2015 and 1.3 million by 2030.

In 2005, the region is estimated to contain about 450,000 households. Less than 3,000 of these are estimated to be in the Downtown Study Area. In recent years, one- and two-person households have accounted for the lion's share of household growth. The average number of persons per household has declined slightly since 1990 and now is just under 2.5.

Household income statistics show that the Oklahoma City region is generally characterized by moderate and middle income households. On an inflation-adjusted basis, median household income has remained relatively constant since 1990.

RESIDENTIAL REAL ESTATE TRENDS

Housing Stock and Tenure

The Oklahoma City residential market is dominated by owner-occupied single family detached homes. About two-thirds of the region's households are owner-occupied, the remainder being renter-occupied. The proportion of renter households has declined slightly in recent years with the advent of historically low interest rates, allowing more people to buy homes.

Regional Housing Development

In accordance with demographic and economic growth, housing development has been significant in recent years, with over 49,000 single family permits and 10,500 multifamily permits issued since 1995. Single family growth has been shared by Oklahoma City and its suburbs, while multifamily growth has been primarily within Oklahoma City.

Home Prices

Housing prices in the region make it among the most affordable markets in the nation. Average resale prices of single family homes have been rising since 2002 and reached $129,000 by 2005.

Multifamily Market

The multifamily market is in moderate health region-wide with an average occupancy of 90 percent. Continued construction and competition with for-sale homes due to low mortgage rates has lowered occupancies for the last few years. Rents have still managed increases, however, likely due to rising operating expenses. The regional average for one bedroom units was $0.62 per square foot in 2004. The highest rents are found in Edmond and Norman, while the average rents North Central Oklahoma City, including Downtown, are close to the regional averages.

Downtown Market

The Downtown Study Area has experienced little housing development over the last 40 years. Only 492 new-construction units were permitted in the Study Area since 1980. Most new development during this time has taken place in the Deep

Deuce area north of Bricktown and the northwestern portion of the Downtown area. Only five existing projects were found to be relevant for analyzing the future of the Downtown market. Three significant projects, at least in terms of size, have been developed in the last ten years: the Garage Lofts, Deep Deuce apartments, and The Montgomery. All are rental projects and have occupancies at or above regional averages. The resident profile of these projects shows a great diversity of ages, from the 20s to the 50s and older, although the lower end of the range is more dominant. Common occupations include attorneys, doctors and medical residents, corporate professionals, graduate students (often medical students), and military officers.

Another factor to consider in evaluating the current Downtown residential market is the presence of popular older single family neighborhoods just to the north of Downtown, Heritage Hills being the most well known. In recent years prices have been rising and areas such as Mesta Park have become gentrified. Attractive historic homes in these neighborhoods range roughly from $150,000 to the $300,000s, with some in excess of $400,000. Buyers in these neighborhoods tend to be well-educated, independent professionals, and there is much trading of houses within the community.

Proposed Development Downtown

Around 700 units are currently planned or proposed in new developments Downtown. They represent a shift toward for-sale product. There is one 300-unit apartment complex planned, Legacy Summit at Arts Central. Four other projects would add in the vicinity of 400 townhouse and condominium units. In all cases, pricing is anticipated to be well above regional averages and at the top end of the market. All of the for-sale projects are proposed for the area around Deep Deuce, north of Bricktown. Another planned project just outside Downtown, the Classen, would be a high-rise office conversion to condominiums. The respective developers of all of these projects hope to be well into construction within the next two years.

Downtown Residents Survey

The survey of existing Downtown residents revealed that the majority (82 percent in the sample) do not work Downtown. Due to the lack of congestion or travel barriers in Oklahoma City, the Downtown market is made up primarily of people making a lifestyle choice – they live there because they like Downtown, not because they are trying to avoid a difficult commute. While they enjoy Downtown's amenities, they do find that it is lacking convenient retail, grocery stores in particular.

PROJECTED DEMAND FOR DOWNTOWN HOUSING

Because so little supply of housing currently exists Downtown and there has not been consistent development over time, it is not possible to fully develop and extrapolate trends from the current Downtown market. This is why the consumer survey of non-Downtown residents was vital in preparing the analysis of projected demand.

Non-Downtown Residents Survey

Current visitation Downtown. Most respondents visit Downtown fairly infrequently; only 16 percent work there, and 67 percent visit Downtown once a month or less. Most respondents go Downtown for leisure activities such as dining out, sports, or other forms of entertainment and recreation.

Propensity to live Downtown. If the right kind of housing were available at the right price, an estimated 9 percent of the population (based on a sample weighted to account for the regional renter / owner ratio) would be very likely to move Downtown. Another 8 percent would be somewhat likely. A separate tabulation of the respondents who rent versus own their home showed a strong divergence of propensities, however. The share of renter respondents who stated they were very likely to move Downtown was more than four times as high as the share of owner respondents (18 percent versus 4 percent). In addition, a remarkable 89 percent of renters who were very likely to move Downtown stated that they would do so within a year. The corresponding share of owners was just 22 percent.

Type and cost of housing desired. Historic loft conversions are the most appealing residential product type for current renters, according to the survey. Current home owners preferred single family homes. Interestingly, only 24 percent overall preferred new construction versus 41 percent who preferred historic properties. Generally, larger units with two or three bedrooms and two baths were preferred over one bedroom units and configurations with fewer bathrooms.

The monthly payments for housing preferred by the respondents were generally less than has typically been the monthly rent in Downtown residential projects for the types of units most desired. Only 34 percent of respondents were willing to pay more than $950 per month. In terms of home ownership, that amount translates roughly to about a $160,000 mortgage principal in today's lending market. The responses to this question indicate that the most recently built Downtown residential projects and those planned for near term development will be affordable to, or at least within the willingness to pay range of, only a minority of those who are interested in moving Downtown.

Other preferences. Apart from structure type, unit configuration, and price, parking is the important consideration for potential Downtown residents; 83 percent of likely Downtown residents stated that an attached parking facility rated a 4 or 5 in importance on a scale from 1 to 5. Garage parking with two spaces per unit is the most preferred parking configuration. Regarding the surrounding neighborhood, nearby restaurants are the most important consideration. The Bricktown area is the most preferred neighborhood. Remarkably, the nearby Deep Deuce and Flatiron areas were among the least desired parts of Downtown in which to live, possibly because they were less well known to the respondents.

Analysis of Projected Demand

To account for the significant differences in consumer preferences revealed by the survey of non-Downtown residents, CDS | Spillette performed separate analyses of projected demand for rental units and for-sale units. A vital point regarding these projections is that they represent an *order of magnitude* of demand, not exact projections.

Rental demand. Using external sources for population projections and assumptions regarding average household size and the renter share of total households, the total number of projected rental households in the region was calculated for 2005, 2010, and 2015. Applying estimates of propensity to live Downtown that are based on the survey results of non-Downtown residents, the total potential Downtown renter households were calculated. These were then adjusted downward to account for the share of households that could afford typical new Downtown residential rental products to arrive at a net potential demand for each analysis year as follows:

	2005	2010	2015
Net rental potential demand (units)	7,546	7,833	8,098

For-sale demand. The potential demand for for-sale units followed the same methodology, with results as follows:

	2005	2010	2015
Net for-sale potential demand (units)	4,497	4,668	4,826

Qualifiers and adjustments to projections. While these calculations indicate that there is a great deal of pent-up potential demand for Downtown living, there are other factors that must be brought into consideration.

- **Housing type –** Because of a limited supply of historic buildings and the economic and physical difficulty of building large units and single family homes Downtown, the likely residential products brought to market

Downtown do not match the top preferences for housing type indicated by the consumer survey. This mismatch would likely serve to reduce potential demand.

- **Housing prices and interest rates –** The analysis assumes that the housing prices most recently built and near term future Downtown projects are indicative of the general range of likely Downtown rents or sale prices. If new development can offer appealing product at more affordable prices, demand is likely to increase. Also, current mortgage rates have tilted demand away from rental housing and toward for-sale housing. An upward shift in rates would likely have the reverse effect, both regionally and Downtown.

- **Employment trends –** Economic disruptions that lead to a decrease in employment growth would have a detrimental impact on the projections in this study. However, a faster increase than anticipated in the hiring of young, educated, well-paid workers, particularly by Downtown-area employers in the Medical Center area, could have a strong positive impact on Downtown housing demand.

- **Age trends –** Stagnation in the growth of the age 25 to 39 population after 2010 and continued large increases in the 55 to 64 age bracket may decrease rental demand and increase for-sale demand respectively in the outlying years of projections.

- **Neighborhood development –** Since the survey respondents based their answers on current perceptions of Downtown, which currently does not have a true modern residential neighborhood, the development of such (with associated retail and amenities) could serve to raise the propensity of the region's population to move Downtown. For example, if the Deep Deuce / Flatiron area achieves the perception of a cohesive and stable neighborhood, this quality would likely reinforce demand. Also, in the longer term, if a quality elementary school and other family-oriented amenities are developed Downtown, demand for Downtown living would likely rise among population segments that today are much less likely to find it appealing.

Projected Absorption. A projection of annual absorption drawing from the base potential demand analyses and the qualifiers and adjustments is a difficult task. It would seem from the base analysis that such a large amount of pent-up demand exists that potentially thousands of units could be built in the immediate term and be easily brought to full occupancy. However the qualifiers and adjustments just outlined cloud the picture somewhat; the extent to which they affect the proposed developments is not quantifiable given existing information. Despite these uncertainties, CDS **|** Spillette is making order of magnitude projections of potential residential absorption in Downtown.

Because of the “friction” associated with moving one’s residence, the actual number of households actively looking for a Downtown residence at a certain time (assuming product was available) is likely less than the base analysis would indicate. In addition, it may be unwise to bring too much residential product to the Downtown market at once even with much pent-up demand. For example, in Washington DC, which has a much more pressured housing market than Oklahoma City and much demand for in-town living, several thousand units of housing were built Downtown in a relatively short time period. The result was an overly competitive market that negatively affected rents and occupancies for the developers, despite the overall regional housing market conditions.

Based upon the base analysis and the other considerations outlined above, CDS | Spillette’s projection of the maximum supportable absorption is as follows:

Table I-1

PROJECTED ANNUAL SUPPORTABLE ABSORPTION OF DOWNTOWN HOUSING, 2005 - 2015

	Housing Units per Year	
	2005 – 2010	**2010 – 2015**
Rental	300 – 500	150 – 350
For-sale	150 – 350	200 – 400

These projections reflect downward adjustments of the base potential demand analyses. This is due to the qualifying factors described above, particularly regarding housing type, prices, and the expected leveling-off of growth in younger and middle-aged age cohorts. It also reflects the judgment of CDS | Spillette, based on professional experience in and research on other cities. While overall demand gives strong reason for optimism, actual absorption rarely achieves such a projected quantity immediately. The projection of average absorption over the first five-year period above represents a relatively “safe” level. Still, the possibility of a “mini boom” over the next one or two years remains. In the outlying years, projected for-sale absorption was increased to account for the continued swelling of the “empty nester” market segment population and the increased appeal of Downtown as a more established neighborhood.

Section II

ECONOMIC AND DEMOGRAPHIC TRENDS

The foundation for the housing market in any region is the health of its employment and population bases. This section presents an overview of the economic and demographic factors that will contribute to Downtown housing demand.

EMPLOYMENT

CDS | Spillette reviewed employment data for the Oklahoma City region from various sources, most importantly the Bureau of Labor Statistics and the Oklahoma Employment Security Commission. Employment figures do not correspond exactly across these two sources, but CDS | Spillette viewed them as reasonable estimations and projections of general employment trends when taken together.

Historical Trends

Table II-1 gives historical estimated employment in the Oklahoma City MSA using Bureau of Labor Statistics data. Over the period 1995 to 2004, total non-farm employment rose by about 66,000 jobs. The bulk of these occurred prior to the economic slowdown of 2001; from 2001 to 2004, the region actually had a net job loss. From 2003 to 2004, however, the number of total jobs began to rise again. The Manufacturing sector in Oklahoma City, as around the nation, has been in decline and has lost nearly 12,000 jobs since 1995. However, Manufacturing losses are small compared to Service sector gains of 67,000 jobs.

Top Employers

The top 40 employers in the MSA are listed in Table II-2. The State of Oklahoma, with a large concentration of employment in and around Downtown, and Tinker Air Force Base are by far the largest employers. Various other categories of government, including education, are also major employers; notable agencies with impacts on Downtown include the City of Oklahoma City and Oklahoma County. The other key category of large employers is health-related institutions, including the University of Oklahoma Health Sciences Center, OU Medical Center, and St. Anthony Hospital, all of which have a significant presence around Downtown. Area wide, the list also includes several manufacturing companies; however, the employment trends discussed above indicate that such firms have a declining role in regional employment.

Table II-1
HISTORICAL EMPLOYMENT TRENDS IN OKLAHOMA CITY MSA

Employment Category	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	Change 1995 -2001	Change 2001 - 2004	Change 1995 - 2004
Total Nonfarm	475.5	490.8	501.1	513.6	527.2	539.8	546.5	542.3	533.2	541.9	71.00	(4.60)	66.40
Total Private	374.8	389.7	397.8	410.5	422.6	433.1	437.3	431.8	424.4	431.2	62.50	(6.10)	56.40
Goods Producing	74.5	75.2	75.7	78.5	80.1	80.3	78.5	70.6	68.6	70.3	4.00	(8.20)	(4.20)
Service-Providing	400.9	415.6	425.4	435.1	447.2	459.5	468.0	471.8	464.6	471.6	67.10	3.60	70.70
Private Service-Providing	300.3	314.5	322.1	332.0	342.5	352.8	358.8	361.2	355.8	360.8	58.50	2.00	60.50
Natural Resources and Mining	5.9	6.1	6.6	6.0	5.2	5.9	6.7	6.7	7.1	8.2	0.80	1.50	2.30
Construction	18.2	18.7	18.9	19.9	21.4	22.6	23.3	22.0	22.7	23.4	5.10	0.10	5.20
Manufacturing	50.5	50.4	50.2	52.6	53.5	51.9	48.6	41.9	38.8	38.7	(1.90)	(9.90)	(11.80)
Durable Goods	35.3	36.1	35.8	38.1	39.0	37.9	35.8	29.9	27.5	27.4	0.50	(8.40)	(7.90)
Non-Durable Goods	3.1	3.2	3.4	3.5	3.4	3.5	3.1	3.0	3.0	3.0	-	(0.10)	(0.10)
Trade, Transportation, and Utilities	92.0	95.6	96.8	98.4	100.1	102.0	100.7	99.1	96.9	96.3	8.70	(4.40)	4.30
Wholesale Trade	20.1	20.5	20.9	21.7	22.0	22.1	21.7	21.4	21.0	20.9	1.60	(0.80)	0.80
Retail Trade	55.7	57.2	57.9	58.7	60.7	62.6	61.6	61.5	60.6	60.0	5.90	(1.60)	4.30
Information	9.9	11.0	11.6	11.1	11.8	13.9	14.5	14.0	13.4	13.2	4.60	(1.30)	3.30
Financial Activities	29.7	31.1	31.4	32.6	33.8	33.7	34.4	35.3	34.8	35.4	4.70	1.00	5.70
Professional and Business Services	48.0	51.8	54.2	59.3	63.3	66.7	68.6	67.9	64.7	66.5	20.60	(2.10)	18.50
Educational and Health Services	53.1	55.4	57.3	58.8	58.3	58.6	60.8	64.4	65.4	67.9	7.70	7.10	14.80
Educational Services	4.4	4.3	4.4	4.2	4.5	4.7	5.0	5.4	6.5	7.5	0.60	2.50	3.10
Health Care and Social Assistance	48.6	51.1	52.8	54.6	53.8	53.9	55.8	59.0	58.9	60.4	7.20	4.60	11.80
Ambulatory Health Care Services	17.8	19.3	20.0	19.4	18.5	18.9	19.2	19.7	20.6	21.8	1.40	2.60	4.00
Hospitals	16.4	17.0	18.4	18.9	19.2	18.8	19.8	20.6	19.9	20.2	3.40	0.40	3.80
Leisure and Hospitality	43.1	43.6	44.5	45.0	46.9	49.1	50.9	51.7	52.0	53.3	7.80	2.40	10.20
Other Services	24.6	26.0	26.2	26.8	28.4	28.9	29.0	28.8	28.2	28.0	4.40	(1.00)	3.40
Government	100.6	101.1	103.3	103.1	104.6	106.7	109.1	110.6	108.7	110.7	8.50	1.60	10.10
Federal Government	23.5	24.4	25.5	25.5	26.0	27.2	27.1	27.2	26.8	27.0	3.60	(0.10)	3.50
State Government	37.4	37.2	37.3	36.0	36.7	36.9	38.3	38.8	38.2	39.1	0.90	0.80	1.70
Local	39.7	39.6	40.5	41.6	42.0	42.6	43.8	44.6	43.6	44.4	4.10	0.60	4.70

Estimated Employment in Thousands

Source: Bureau of Labor Statistics

Table II-2

TOP 40 EMPLOYERS IN OKLAHOMA CITY MSA

Name	City	Sector	Employees
State of Oklahoma	Oklahoma City	Government	38,100
Tinker Air Force Base	Oklahoma City	Government	26,000
U.S. Postal Service	Oklahoma City	Government	8,706
University of Oklahoma	Norman	Education	7,902
Oklahoma City Public Schools	Oklahoma City	Education	5,900
FAA Mike Monroney Aeronautical Center	Oklahoma City	Government	5,600
City of Oklahoma City	Oklahoma City	Government	4,320
INTEGRIS Baptist Medical Center	Oklahoma City	Health	4,102
General Motors Corporation Assembly Plant	Oklahoma City	Manufacturing	3,400
University of Oklahoma Health Sciences Center	Oklahoma City	Education	3,200
OU Medical Center	Oklahoma City	Health	3,200
Hertz Reservation Center	Oklahoma City	Service	3,100
OGE Energy Corporation	Oklahoma City	Service	2,973
Mercy Health Center	Oklahoma City	Health	2,900
Putnam City Public Schools	Oklahoma City	Education	2,600
Edmond Public Schools	Edmond	Education	2,500
United Parcel Service	Oklahoma City	Service	2,500
St. Anthony Hospital	Oklahoma City	Health	2,351
Moore Public Schools	Moore	Education	2,320
Homeland Stores, Inc.	Oklahoma City	Food	2,200
Grace Living Centers	Oklahoma City	Health	2,100
Midwest City Public Schools	Midwest City	Education	2,100
Norman Regional Hospital	Norman	Health	2,043
Unit Parts Company	Oklahoma City	Manufacturing	2,003
Hobby Lobby Stores	Oklahoma City	Retail	2,000
University of Central Oklahoma	Edmond	Education	2,000
Dayton Tire	Oklahoma City	Manufacturing	1,800
Farmers Insurance Group	Oklahoma City	Insurance	1,700
U.S. Department of Veterans Affairs Medical Center	Oklahoma City	Health	1,700
Oklahoma County	Oklahoma City	Government	1,660
Deaconess Hospital	Oklahoma City	Health	1,617
INTEGRIS Southwest Medical Center	Oklahoma City	Health	1,603
Norman Public Schools	Norman	Education	1,600
American Fidelity Assurance Company	Oklahoma City	Banking, Insurance	1,500
SBC Oklahoma	Oklahoma City	Service	1,500
W.H. Braum, Inc. (Headquarters)	Oklahoma City	Mfg. / Retail	1,500
Sonic Corporation (Headquarters)	Oklahoma City	Retail	1,500
Midfirst Bank	Oklahoma City	Banking	1,492
Convergys	Moore	Service	1,450
A T & T Wireless Services	Oklahoma City	Service	1,400
Midwest Regional Medical Center	Midwest City	Health	1,301

Source: Greater Oklahoma City Chamber of Commerce

Wages by Industry

The Oklahoma Employment Security Commission also tracks average wages for various industries. These are shown in Table II-3. The highest weekly wages are within the mining sector, which includes oil and gas firms. Some of these firms, such as Kerr McGee, are located Downtown. Management of companies and enterprises was the second highest average wage, followed by the Utilities sector and Public Administration, which has a heavy presence Downtown. The relatively higher average wages within these sectors indicate the potential for high-income households that could afford new market-rate housing in Downtown.

Projected Employment

The most recent employment projections prepared by the Oklahoma Employment Security Commission indicate that the trend of a declining Manufacturing sector and growing Service sectors will continue. Table II-4 presents these projections for the year 2012 for a four-county area that includes Oklahoma, Logan, Canadian, and Cleveland counties. From a 2002 base of just under 500,000 jobs, this area is projected to add over 68,000 jobs by 2012. During this time, Manufacturing is projected to lose about 2,000 jobs and Mining (with the highest average wage as noted above) about 900 jobs. The Utilities sector is also projected to have a slight decrease.

The largest gains, at nearly 15,000 jobs, will come in Health Care and Social Assistance. This is particularly significant for Downtown, with its adjacency to the Health Sciences Center, Medical Center, and St. Anthony Hospital. Other major gains will come from Education Services, Administrative and Support Services / Waste Management, and retail trade.

A key aspect of knowing the character of future jobs is the educational requirements for those jobs. Table II-5 gives a projection of educational requirements for the three-county area of Oklahoma, Logan, and Canadian counties. This shows that only 11,000 new jobs are likely to require a college degree, compared to the 36,000 new jobs that will not require a college degree. This means that, even with strong employment growth, most new jobs will be low-skill, lower-paying jobs. This corresponds with the growth in the Service sectors and Retail Trade, which are dominantly characterized by such a work force. It should be noted, however, that certain specific industries and occupation levels within the Retail and Services sectors do feature more highly educated employees, and advanced occupation levels can be well-paid even if a college degree was not required.

Table II-3

AVERAGE WEEKLY WAGE BY INDUSTRY, OKLAHOMA MSA, 3Q 2004

Industry Category	# of Employers	Employment				Total Wages	Avg. Weekly Wage
		July	August	Sept.	3rd Qtr Average		
Agriculture, Forestry, Fishing & Hunting	93	594	571	559	575	$ 3,150,024	$ 422
Mining	656	8,014	8,070	8,125	8,070	$ 129,630,122	$ 1,236
Utilities	114	3,783	3,791	3,807	3,794	$ 47,378,639	$ 961
Construction	3,051	24,707	24,647	24,442	24,599	$ 194,063,327	$ 607
Manufacturing	1,277	39,095	39,168	39,099	39,121	$ 388,106,241	$ 763
Wholesale Trade	1,752	20,884	20,796	20,656	20,779	$ 201,149,466	$ 745
Retail Trade	3,849	60,061	60,075	59,877	60,004	$ 336,452,527	$ 431
Transportation & Warehousing	812	15,348	15,229	15,419	15,332	$ 146,078,493	$ 733
Information	517	14,338	14,136	13,900	14,125	$ 140,512,837	$ 765
Finance & Insurance	2,198	21,977	21,993	21,907	21,959	$ 213,998,750	$ 750
Real Estate, Rental & Leasing	1,358	11,816	11,772	11,688	11,759	$ 90,567,957	$ 592
Professional, Scientific, & Technical Services	3,612	24,298	24,530	24,460	24,429	$ 252,895,009	$ 796
Management of Companies & Enterprises	132	4,720	4,689	4,651	4,687	$ 67,240,539	$ 1,104
Administrative & Support / Waste Mgmt. / Remediation Svcs.	1,743	40,814	40,984	41,317	41,038	$ 217,248,959	$ 407
Education Services	339	39,559	43,443	53,885	45,629	$ 322,383,183	$ 543
Health Care & Social Assistance	3,193	66,189	66,386	66,354	66,310	$ 581,049,375	$ 674
Arts, Entertainment, & Recreation	344	9,065	8,650	8,572	8,762	$ 34,375,464	$ 302
Accommodation & Food Services	2,049	47,702	47,943	48,287	47,977	$ 136,851,907	$ 219
Other Services, Except Public Administration	2,408	14,892	14,622	14,523	14,679	$ 85,125,798	$ 446
Public Administration	516	48,523	48,755	48,862	48,713	$ 567,124,845	$ 896
Unclassified	25	37	40	41	39	$ 203,269	$ 398
TOTAL	**30,038**	**516,416**	**520,290**	**530,431**	**522,379**	**$ 4,155,586,731**	**$ 612**

Source: Oklahoma Employment Security Commission

Table II-4

EMPLOYMENT PROJECTIONS, OKLAHOMA CITY FOUR-COUNTY AREA, 2002 – 2012

Industry Category	Employment Estimated 2002	Employment Projected 2012	Employment Change
Agriculture, Forestry, Fishing & Hunting	580	660	80
Mining	6,100	5,190	(910)
Utilities	2,480	2,200	(280)
Construction	20,140	21,430	1,290
Manufacturing	37,860	35,840	(2,020)
Wholesale Trade	20,310	22,700	2,390
Retail Trade	58,100	67,100	9,000
Transportation & Warehousing	12,590	14,260	1,670
Information	13,760	15,910	2,150
Finance & Insurance	20,440	22,000	1,560
Real Estate, Rental & Leasing	10,460	11,520	1,060
Professional, Scientific, & Technical Services	23,180	28,260	5,080
Management of Companies & Enterprises	5,400	5,900	500
Administrative & Support / Waste Management / Remediation Svcs.	38,460	47,230	8,770
Education Services	47,700	58,790	11,090
Health Care & Social Assistance	57,980	72,900	14,920
Arts, Entertainment, & Recreation	6,570	8,410	1,840
Accommodation & Food Services	43,010	49,450	6,440
Other Services, Except Public Administration	14,830	16,380	1,550
Federal Government	26,940	27,060	110
State Government	18,160	19,210	1,040
Local Government	13,300	14,530	1,230
TOTAL	498,350	566,930	68,560

Source: Oklahoma Employment Security Commission

Table II-5

PROJECTIONS OF EMPLOYMENT BY EDUCATIONAL REQUIREMENTS, 2002 – 2012

	Oklahoma, Cleveland, and Logan Counties Estimated / Projected Jobs			
Minimum Education Attainment Required	**2002**	**2012**	**Change**	**Total Openings**
Bachelor's degree	35,210	40,630	5,420	11,790
Bachelor's or higher degree, plus work experience	24,890	28,890	4,000	8,520
Master's degree	4,750	5,550	800	1,760
First professional degree	7,030	8,070	1,040	2,110
Doctoral degree	440	520	80	170
Total 4-year college degree required	**72,320**	**83,660**	**11,340**	**24,350**
All other occupations	363,360	399,320	35,960	131,590

Near-Term Regional Economic Outlook

According to economists at Oklahoma State University, the Oklahoma City region has outperformed the rest of the state and the nation in terms of employment growth since 2003 when economic recovery began in earnest. Employment gains are anticipated in the Government and Leisure and Hospitality sectors plus its revitalized Mining (oil and gas) sector. The Manufacturing sector, however, will continue to weaken. Overall, the local economy in Oklahoma City is projected to finish 2005 on a relatively strong note.

Outlook for Key Downtown-Area Employers

In many cities, Downtown employment is a major driver of demand for downtown housing. This is much less true in Oklahoma City (see Section III) although research indicates that it is still an important factor. CDS | Spillette contacted several significant employers in and around Downtown Oklahoma City to obtain a sense of what their outlook for their Downtown workforce might be. Employers contacted included:

- City of Oklahoma City
- Oklahoma County
- State of Oklahoma (Department of Environmental Quality)
- Oklahoma Health Center
- Presbyterian Health Foundation Research Park
- St. Anthony Hospital (SSMOK)

- Devon Energy
- Kerr-McGee
- Sonic

These contacts represent approximately 20,000 Downtown employees, plus 3,000 students at the Oklahoma Health Center.

For privacy reasons, it is not possible to detail the results of this informal survey for every employer. However, several generalizations are possible:

- Varying portions of employers' workforces are salaried. One health care-related employer indicated that about 25 percent of its employees are salaried; for private employers it may be considerably higher. For employers that gave some information on their salaried workers (six employers total), the average annual pay appears to be $50,000 to $60,000. However, several of these employers indicated that the salary range starts around $25,000 - $30,000 and extend upward to executive levels above $150,000. Few employers gave information on the average ages of their employees, but those that did indicated most employees were between the ages of 30 and 45 with an average near 40.

- While accurate statistics on the residential locations of employees was not generally available, several employers indicated that the vast majority of their employees live in the suburbs (Edmond, Norman, and Yukon were mentioned) or the northwest part of Oklahoma City, seeking preferred school systems. None indicated that a significant number of employees have shown particular desire to live near Downtown, although the Health Center mentioned that its students tend to live close by, and many actually have the resources to buy homes during their 3 to 4 year stay.

- Several employers anticipated growth over the next several years, and the remainder either could not answer or expected a relatively constant employee base. The most significant expected growth was at the Oklahoma Health Center and the Presbyterian Health Foundation. The Health Center hopes to add several thousand employees and students over the next five years, while the Presbyterian Health Foundation expects growth of 100 to 125 jobs per year over the next 8 to 10 years. The additional employees and students should fit a similar profile to their worker and student profiles today. The City of Oklahoma City, interestingly, does not expect growth in total employment but does anticipate a younger workforce as large numbers of older employees move toward retirement. The State of Oklahoma's Department of Environmental Quality expects that its growth over the next two to three years will be about 45 college-educated professionals under age 30.

- Responses on the origination of their employees were limited. However, for those that had information or estimations, the common theme was that the general bulk of employees come from central Oklahoma, but those positions requiring advanced degrees had a high likelihood of being filled by people from out of state. Many of these highly educated employees would be moving from cities where urban living was an available lifestyle choice. The surveyed employers generally did not mention any audible desire by their employees to have more living options Downtown, although the City said its young single and empty nester employees had brought this up. The employers who had heard comments about Downtown from their employees stated that they were generally positive with praise for the recent MAPS and Bricktown improvements.

Other Employers of Note

Two other employers that represent significant potential sources of demand for Downtown housing are Tinker Air Force Base and Dell Computer. Because of security concerns, exact figures on base employment are not made available to the public. However, General Dick Burpee has estimated that the base employs at least 2,500 officers out of 8,700 total military personnel, plus their dependents. Officers, with higher incomes than enlisted personnel, are particularly relevant to the Downtown housing market, as will be related in Section III of this report. There is also a civilian workforce associated with the base, which likely makes up some of the difference between these figures and the 26,000 jobs shown in the Top Employers table from the Greater Oklahoma City Chamber of Commerce. The recent BRAC plan likely means an increase of a few hundred military personnel at the base, about one-third of which would likely be officers. The greatest impact of BRAC is anticipated to be an increase in the base's civilian workforce.

Dell Computer is opening its Business Service Center along the North Canadian River to the southwest of Downtown. While the company does not divulge exact numbers of planned jobs, it could be as high as 3,000. The facility will be located within a 10-minute drive of Downtown; to the extent that it hires an educated, well-paid work force and especially if those employees are relocating from other large cities, it could represent another significant source of Downtown housing demand.

POPULATION

Total Population

The Oklahoma City region grew its population base in the 1990s, adding 112,000 residents to the MSA according to the Census. Over half of this growth (54 percent) occurred within the City of Oklahoma City. Estimates from Claritas suggest that regional growth has continued since 2000, with an increase of another 45,000 residents. Since 2000, the City of Oklahoma City is estimated to have captured a lower share (37 percent) of regional growth. The Downtown Study Area has also grown, adding about 1,200 residents from 1990 to 2000 and another 150 during the following five years. Some of this population, of course, resides in jails and institutions; this "group quarters" population in Downtown is estimated at about 3,000 in 2005.

Table II-6

HISTORICAL AND PROJECTED POPULATION, OKLAHOMA CITY REGION

	Population				Population Change		
	Estimated			Projected	1990 -	2000 -	2005 -
Geographic Area	1990	2000	2005	2010	2000	2005	2010
Oklahoma City MSA	971,042	1,083,346	1,128,728	1,171,728	112,304	45,382	43,000
Oklahoma City	445,065	506,132	523,060	539,870	61,067	16,928	16,810
Downtown	6,488	7,653	7,805	8,010	1,165	152	205

Source: US Census 1990 and 2000, Oklahoma Department of Commerce, and Claritas, Inc.

Population by Age

The region's population change is affected both by in-migration and internal births, deaths, and aging. Of course, the largest age-related trend in the nation is the population "bulge" of the baby boomers, who first reached age 50 during the late 1990s. Behind them is the "baby bust" followed by the "echo boomers." Historical population by age trends in Oklahoma City bears this out, as indicated in Table II-7. The 1990s and early 2000s have been marked by a large contingent of residents moving into their 50s, followed by a cohort that is considerably smaller, currently moving into its 40s. Behind that, the larger "echo boomer" cohort is moving into its 30s. These age trends are relevant for Downtown housing demand because young people between the ages of 25 and 34 and "empty nesters" between the ages of 55 and 64 are considered key populations that would consider moving into a Downtown environment.

Table II-7

POPULATION BY AGE, OKLAHOMA CITY MSA, 1990 – 2003

	1990		2000		2003		Change 1990 - 2000	Change 2000 - 2003
	Count	Share	Count	Share	Count	Share		
Total	958,839	100.0%	1,083,346	100.0%	1,085,072	100.0%	124,507	1,726
Under 5	71,318	7.4%	75,671	7.0%	79,497	7.3%	4,353	3,826
Age 5 - 9	75,044	7.8%	75,634	7.0%	72,307	6.7%	590	(3,327)
Age 10 - 14	68,720	7.2%	77,098	7.1%	77,719	7.2%	8,378	621
Age 15 - 19	71,213	7.4%	85,237	7.9%	76,154	7.0%	14,024	(9,083)
Age 20 - 24	74,621	7.8%	87,044	8.0%	82,363	7.6%	12,423	(4,681)
Age 25 - 34	170,989	17.8%	153,518	14.2%	161,238	14.9%	(17,471)	7,720
Age 35 - 44	145,636	15.2%	169,856	15.7%	157,830	14.5%	24,220	(12,026)
Age 45 - 54	97,263	10.1%	144,238	13.3%	156,625	14.4%	46,975	12,387
Age 55 - 59	40,615	4.2%	51,212	4.7%	58,880	5.4%	10,597	7,668
Age 60 - 64	37,910	4.0%	40,698	3.8%	44,323	4.1%	2,788	3,625
Age 65 - 74	60,525	6.3%	66,832	6.2%	65,687	6.1%	6,307	(1,145)
Age 75 - 84	33,909	3.5%	41,914	3.9%	42,895	4.0%	8,005	981
Age 85+	11,076	1.2%	14,394	1.3%	9,554	0.9%	3,318	(4,840)
Median Age	N/A		34.1		34.6			

Source: US Census

Projections of Population

As employment is projected to rise, so is population in the region. CDS | Spillette examined multiple sources with varying time frames for population projections in Oklahoma City including the Oklahoma Department of Commerce, the Association of Central Oklahoma Governments (ACOG), and the private demographic service Claritas. ACOG also projects for a regional geographic area that does not correspond exactly to the definition of the MSA because it cuts across county boundaries, although it includes all of the substantially urbanized areas of the MSA. Here is a comparison of the various projections by source:

	Projection Year		
Source	**2010**	**2020**	**2030**
Claritas	1,211,071	N/A	N/A
Department of Commerce	1,171,728	1,247,442	1,312,843
ACOG (OCARTS area)	N/A	N/A	1,335,036

The Department of Commerce data appears to be the most conservative projection of the three sources. While there are likely merits to each set of projections, CDS | Spillette is not in the position to evaluate them in this study. Therefore, the most conservative projections, those from the Department of Commerce, will be used as the population baseline for this study, though the other projections may inform analysis of housing demand.

Table II-8

POPULATION PROJECTIONS BY AGE, OKLAHOMA CITY MSA, 2000 - 2030

Age Cohort	Estimated or Projected Population							Projected Change		
	Census 2000	2005	2010	2015	2020	2025	2030	2005 - 2010	2010 - 2020	2020 - 2030
Total Population	1,083,346	1,128,728	1,171,728	1,211,329	1,247,442	1,280,984	1,312,843	43,000	75,714	65,401
0 to 24	400,688	405,122	410,065	414,020	419,915	424,270	425,763	4,943	9,850	5,848
25 to 39	**237,875**	**235,891**	**243,426**	**243,829**	**241,346**	**240,503**	**247,046**	**7,535**	**(2,080)**	**5,700**
40 to 54	218,030	243,851	239,007	233,731	232,446	240,174	241,049	(4,844)	(6,561)	8,603
55 to 64	**101,910**	**113,557**	**135,161**	**150,377**	**156,176**	**145,861**	**143,218**	**21,604**	**21,015**	**(12,958)**
65 to 84	108,740	114,086	124,693	146,711	173,773	203,012	223,853	10,607	49,080	50,080
85 and over	14,394	16,324	19,370	21,667	23,696	26,434	31,909	3,046	4,326	8,213

Source: Oklahoma Department of Commerce

A specific useful feature of the Department of Commerce projections is that they also project population for the MSA by age cohorts, shown in Table II-8. The key age cohorts of 25 to 34 and 55 to 64 are highlighted. Through 2010, the population in the 25 to 34 range is projected to increase by about 7,500, then decreasing by about 2,000 during the next ten years. The age 55 to 64 bracket, however, is projected to show very strong growth through 2020, gaining over 42,000 people during the fifteen year period.

HOUSEHOLDS

Total Households

Households, or occupied housing units, are a function of total population (less group quarters population), family formation, and other factors that influence people to live either by themselves or with other people. Table II-9 below gives the historical and projected households for the MSA, the City of Oklahoma City, and Downtown. The City has accounted for about 45 percent of all growth in households from 1990 to 2005. Downtown experienced very little growth in households during the time period, although these estimates may not account for recent residential developments such as Deep Deuce.

Table II-9

HISTORICAL AND PROJECTED HOUSEHOLDS

	Number of Households				Change in Households		
	Estimated			Projected	1990 -	2000 -	2005 -
Geographic Area	1990	2000	2005	2010	2000	2005	2010
Oklahoma City MSA	372,362	424,764	454,581	480,351	52,402	29,817	25,770
Oklahoma City	178,768	204,434	215,539	226,832	25,666	11,105	11,293
Downtown	2,746	2,818	2,841	2,882	72	23	41

Source: US Census 1990 and 2000, Oklahoma Department of Commerce, and Claritas, Inc.

Household Size

There has been a slow trend toward decreasing household size in the region. Table II-10 shows this trend for the MSA. One- and two-person households increased their share of total households from 1990 to 2000, while the share of larger households declined. Current estimates indicate that one-person households continue to gain share as the share of households of four persons or more continues to decline.

Table II-10

HOUSEHOLDS BY HOUSEHOLD SIZE, OKLAHOMA CITY MSA

Household Size	Estimated Number of Households 1990	Share	2000	Share	2005	Share	Change in Households 1990 - 2000	2000 - 2005
Total Households	367,775	100.0%	424,764	100.0%	454,581	100.0%	56,989	29,817
1 person	96,620	26.3%	116,773	27.5%	126,473	27.8%	20,153	9,700
2 persons	119,326	32.4%	143,383	33.8%	152,510	33.5%	24,057	9,127
3 persons	63,496	17.3%	70,792	16.7%	76,823	16.9%	7,296	6,031
4 or more persons	88,333	24.0%	93,816	22.1%	98,775	21.7%	5,483	4,959
Average	2.53		2.47		2.46			

Source: US Census 1990 and 2000, and Claritas, Inc.

Projected Households

The short term projections from Table II-9 indicate that the MSA will grow by nearly 26,000 households from 2005 to 2010. Long range projections of households for the Oklahoma City area, however, are not widely published. ACOG has projected for its OCARTS planning area that in 2030, the region will have the following total housing units and associated population (projected group quarters population not shown):

	Housing Units	Population	Population / Household*
Single family	467,776	1,132,504	2.66
Multifamily	107,959	168,546	1.71
Total	575,735	1,301,050	2.48

* Assumes a 9% vacancy rate for all units.

Under a 9 percent vacancy rate assumption, the projected average persons per household of 2.48 is very slightly higher than the current estimate of 2.46. Since the OCARTS planning area is smaller than the MSA, it could be said that ACOG projects at least 69,000 households (occupied housing units, after adjusting for the projected vacancy rate) will be added to the MSA by 2030.

HOUSEHOLD INCOME

When taken at face value, household incomes in the Oklahoma City region appear to be rising. The proportion of households earning annual incomes of $75,000 or more increased from 6.2 percent in 1989 to an estimated 22.3 percent at present. Median nominal dollar household income has risen in concert. However, when median household income is adjusted using the South region Urban Consumer Price Index, it becomes apparent that incomes have risen essentially at the pace of inflation, meaning real incomes have remained fairly constant for the last 15 years. For comparison, the 2000 Census reported the 1999 median household income for the United States as a whole to have been $41,994 (nominal dollars). At a 1999 median household income of $36,797, Oklahoma City is clearly a moderate income market overall.

Table II-11

HOUSEHOLDS BY INCOME LEVEL, OKLAHOMA CITY MSA

	Households by Income Cohort						Change	
	1989		1999		2005		1989 - 1999	1999 - 2005
Income Cohort	**Number**	**Share**	**Number**	**Share**	**Number**	**Share**		
Total Households	368,502	100.0%	425,060	100.0%	454,581	100.0%	56,558	29,521
Under $15,000	97,083	26.3%	75,222	17.7%	68,547	15.1%	(21,861)	(6,675)
$15,000 - $24,999	73,590	20.0%	64,126	15.1%	59,288	13.0%	(9,464)	(4,838)
$25,000 - $34,999	63,218	17.2%	62,149	14.6%	59,975	13.2%	(1,069)	(2,174)
$35,000 - $49,999	63,906	17.3%	74,259	17.5%	78,603	17.3%	10,353	4,344
$50,000 - $74,999	47,808	13.0%	78,831	18.5%	86,629	19.1%	31,023	7,798
$75,000 - $99,999	12,804	3.5%	35,978	8.5%	46,141	10.2%	23,174	10,163
$100,000 - $149,999	5,964	1.6%	22,570	5.3%	37,489	8.2%	16,606	14,919
$150,000 and over	4,129	1.1%	11,925	2.8%	17,909	3.9%	7,796	5,984
Median Income	$ 26,883		$ 36,797		$ 42,534			
CPI-adjusted (2005$)	$ 41,442		$ 42,544		$ 42,534			

Source: US Census 1990 and 2000, and Claritas, Inc.

Section III

RESIDENTIAL REAL ESTATE TRENDS

In contrast to some cities in the United States experiencing strong demand for downtown housing, particularly on the west coast and the northeast, the Oklahoma City area is not characterized by geographic or topographic limitations, excessively burdensome congestion and commutes, or extraordinary real estate prices. Instead, the region features the opposite of those factors. This market context is a strong influence on the nature of housing development and prices in Oklahoma City, including Downtown housing. This section reviews this regional market context and presents findings on the characteristics of existing Downtown housing and residents.

REGIONAL HOUSING CHARACTERISTICS

Housing Stock

Table III-1 gives a profile of the housing stock in the Oklahoma City Metropolitan Statistical Area (MSA) based on the 1990 and 2000 Censuses and a 2005 estimate. Since 1990, it is estimated that the MSA has added nearly 75,000 housing units, reaching about 500,000 units in 2005.

Single family units dominate the market, comprising over two-thirds of the housing stock, and are responsible for the lion's share of housing stock growth. The share of multifamily units (3 or more units in the structure) has dropped since 1990 from 20 percent to less than 19 percent. Single family attached (townhome) units and duplexes account for about 5 percent of the housing stock.

Tenure

Occupied housing units (as opposed to vacant units or group quarters) in the MSA, also equal to the number of households, are estimated to total over 450,000 in 2005. From 1990 to 2000, the region added about 57,000 occupied housing units. From 2000 to 2005, the addition of households is estimated to have accelerated, with an increase of about 30,000 units during that period.

Table III-1

HOUSING CHARACTERISTICS, 1990 – 2005
OKLAHOMA CITY MSA

Household Category	Number of Housing Units						Change	
	1990	Share	2000	Share	2005	Share	1990 - 2000	2000 - 2005
Total housing units	425,043	100.0%	466,230	100.0%	499,067	100.0%	41,187	32,837
Structure Type								
1 unit, detached	290,383	68.3%	324,408	69.6%	346,483	69.4%	34,025	22,075
1 unit, attached	13,396	3.2%	15,116	3.2%	15,727	3.2%	1,720	611
2 units	9,853	2.3%	9,001	1.9%	9,113	1.8%	(852)	112
3 to 19 units	63,490	14.9%	60,955	13.1%	64,242	12.9%	(2,535)	3,287
20 or more units	23,270	5.5%	27,919	6.0%	29,320	5.9%	4,649	1,401
Subtotal 3 or more units	86,760	20.4%	88,874	19.1%	93,562	18.7%	2,114	4,688
Mobile home	20,972	4.9%	28,111	6.0%	33,398	6.7%	7,139	5,287
Boat, RV, van, etc.	3,679	0.9%	720	0.2%	784	0.2%	(2,959)	64
Housing Tenure								
Total Occupied Housing Units	367,775	100.0%	424,764	100.0%	454,581	100.0%	56,989	29,817
Owner-occupied	36,478	64.3%	274,846	64.7%	298,055	65.6%	38,368	23,209
Renter-occupied	31,297	35.7%	149,918	35.3%	156,526	34.4%	18,621	6,608

Sources: US Census 1990 and 2000; Claritas, Inc.

Owner-occupied units constitute just under two-thirds of the MSA's occupied units. This is in line with the national share, which was about 66 percent as of 2000. The recent history of low mortgage rates, enabling a greater number of households to qualify for home purchases, has likely led to an increase in the proportion of owner-occupied units versus renter-occupied. Still, estimates indicate that the MSA has added about 6,600 additional renter households since 2000.

Development Activity

As the Oklahoma City region has grown in population and employment, housing development has kept pace. Development activity, as tracked by building permit issuance, is shown in Tables III-2 and III-3. Single family permits, with over 49,000 issued from 1995 onward, have dominated. The City of Oklahoma City accounted for about 26,000 of those permits. Other areas of strong permit activity included Norman, Edmond, and Moore. Activity has been especially strong since 2001, mirroring record building activity at the national level.

Municipalities have also issued permits for over 10,500 multifamily units from 1995 to the present. The City of Oklahoma City accounted for the greatest share of these by far, with nearly 7,500 units during the period. The next largest quantity of units permitted was in Norman at only 849.

Table III-2

SINGLE FAMILY RESIDENTIAL PERMITS ISSUED IN OKLAHOMA CITY REGION, 1995 - 2005

Location	Single Family Permits											
	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	YTD 2005	Total
Oklahoma City	1,721	1,903	1,984	2,352	2,831	1,937	2,303	2,806	3,381	3,454	1,221	**25,893**
Nichols Hills	8	6	4	4	3	5	1	5	6	16	3	**61**
Warr Acres	5	6	8	3	-	1	1	3	10	3	-	**40**
Bethany	7	8	6	3	3	3	1	5	6	4	1	**47**
Midwest City	99	130	103	81	185	81	112	172	184	243	75	**1,465**
Del City	1	8	15	7	102	N/A	N/A	N/A	N/A	N/A	N/A	**N/A**
Village	-	-	-	1	53	-	0	-	3	2	-	**59**
Oklahoma Co.	100	113	85	117	158	93	147	208	259	295	73	**1,648**
Edmond	505	546	482	589	557	435	492	529	677	652	246	**5,710**
Yukon	54	80	55	68	56	43	52	96	116	150	50	**820**
Moore	205	182	129	204	394	322	337	434	742	762	291	**4,002**
Mustang	85	93	115	148	135	113	187	143	203	170	108	**1,500**
Norman	541	626	513	573	639	439	497	492	619	653	252	**5,844**
Choctaw	49	74	46	52	82	83	84	76	95	75	38	**754**
El Reno	19	19	25	16	12	18	17	29	16	17	9	**197**
Subtotal	**3,399**	**3,794**	**3,570**	**4,218**	**5,210**	**3,573**	**4,231**	**4,998**	**6,317**	**6,496**	**2,367**	**48,040**
Piedmont	N/A	N/A	N/A	N/A	N/A	N/A	N/A	62	81	110	48	**301**
Blanchard	N/A	N/A	N/A	N/A	N/A	N/A	N/A	49	93	129	58	**329**
Newcastle	N/A	N/A	N/A	N/A	N/A	N/A	N/A	65	61	114	37	**277**
Tuttle	N/A	N/A	N/A	N/A	N/A	N/A	N/A	89	77	105	35	**306**
TOTAL	**3,399**	**3,794**	**3,570**	**4,218**	**5,210**	**3,573**	**4,231**	**5,263**	**6,629**	**6,954**	**2,545**	**49,253**

Source: Oklahoma City Chamber of Commerce

Table III-3

MULTIFAMILY RESIDENTIAL PERMITS ISSUED IN OKLAHOMA CITY REGION, 1995 - 2005

	Multifamily Units Permitted											
Location	**1995**	**1996**	**1997**	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**YTD 2005**	**Total**
Oklahoma City	78	440	1,598	729	344	2,395	493	553	195	294	366	**7,485**
Nichols Hills	-	-	-	-	-	-	-	-	-	-	-	**-**
Warr Acres	-	-	-	-	-	-	4	-	-	-	-	**4**
Bethany	-	-	-	9	-	-	-	-	-	-	-	**9**
Midwest City	-	-	-	-	-	-	-	4	298	4	6	**312**
Del City	-	-	-	-	-	N/A	N/A	N/A	N/A	N/A	N/A	**N/A**
Village	-	-	-	-	197	-	-	-	-	-	-	**197**
Oklahoma	5	-	-	-	-	-	2	-	-	-	-	**7**
Edmond	1	5	96	332	-	-	-	16	-	-	-	**450**
Yukon	-	-	38	55	-	59	-	-	60	-	-	**212**
Moore	1	6	2	2	37	-	28	24	-	132	22	**254**
Mustang	-	-	18	192	101	4	4	96	6	16	-	**437**
Norman	26	95	26	24	59	8	16	105	232	44	214	**849**
Choctaw	-	-	-	-	-	2	-	-	-	162	-	**164**
El Reno	-	-	-		-		-	-	-	-	95	**138**
Subtotal												
Piedmont	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	-	-	**-**
Blanchard	N/A	N/A	N/A	N/A	N/A	N/A	N/A	20	4	8	-	**32**
Newcastle	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	-	-	5	**5**
Tuttle	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	2	-	-	**2**
TOTAL	**111**	**546**	**1,778**	**1,368**	**738**	**2,486**	**547**	**818**	**797**	**660**	**708**	**10,557**

Source: Oklahoma City Chamber of Commerce

For-Sale Housing Price Trends

Unfortunately, statistics regarding for-sale housing in Oklahoma City are limited. However, it is clear that home prices in the region are generally rising. Table III-4 gives a recent history of home resale prices in the MSA. Since 2001, the quarterly average resale price has risen over $20,000, to about $129,000. These prices make Oklahoma City homes exceedingly affordable to buyers at the national level; the April 2005 national average home price as reported by the Federal Housing Finance Board was $283,800. As estimated by the National Association of Home Builders through their NAHB-Wells Fargo Housing Opportunity Index, in the first quarter of 2005, Oklahoma City was the 29th most affordable housing market in the nation, with 81.0 percent of homes affordable to median-income households.

Table III-4

AVERAGE HOME RESALE PRICES
OKLAHOMA CITY METRO AREA

Time Period		# Sales	Avg. Price
2002	Q1	3,248	$ 107,934
	Q2	4,154	$ 114,378
	Q3	4,274	$ 115,939
	Q4	3,811	$ 113,033
2003	Q1	3,390	$ 113,270
	Q2	4,661	$ 118,022
	Q3	5,198	$ 125,126
	Q4	4,122	$ 117,800
2004	Q1	3,953	$ 122,485
	Q2	5,327	$ 127,018
	Q3	5,324	$ 128,660
	Q4	4,140	$ 128,661
2005	Q1	3,844	$ 129,216

Source: Oklahoma Association of Realtors

Unfortunately, separate statistics were not available for condominiums or single family attached units (townhomes).

Multifamily Market Trends

Occupancy. The present market for multifamily rental demand in the Oklahoma City region has overall been somewhat soft over the last year or two. Area-wide occupancy has drifted downward since 1999 for several reasons: diminishing of the impact of the Moore-area 1999 tornado; continued multifamily construction; and especially a significant conversion of renters to homeowners, driven by historically low mortgage rates and single family construction.

Table III-5 lists historical occupancy for various Oklahoma City submarkets and the area as a whole. The North Central Oklahoma City submarket, which includes Downtown, has shown relatively constant occupancy rates at around 89 percent. This submarket's rate has remained slightly below the area-wide occupancy rate that was 90 percent in 2004. The submarkets with the highest occupancy are Edmond and Norman. Edmond was the only submarket where occupancy rose from 2003 to 2004.

Table III-5

MULTIFAMILY RENTAL OCCUPANCIES, 1999 - 2004

	Estimated Occupancy Rate					
Market Area	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**
North Central OKC	**89%**	**90%**	**91%**	**89%**	**89%**	**89%**
Edmond	96%	94%	95%	94%	93%	95%
Midwest City / Del City	98%	95%	92%	91%	90%	90%
Mustang / Yukon	98%	95%	95%	97%	93%	91%
Norman	94%	94%	96%	95%	95%	92%
Northwest OKC	92%	92%	92%	90%	89%	88%
South OKC	96%	91%	93%	93%	92%	89%
OKC Area Total	94%	93%	93%	92%	91%	90%

Source: Price Edwards & Company

Rental rates. As with for-sale homes, Oklahoma City is considered an "affordable" market in terms of apartment rents. Average rents per square foot for various types of apartment units are shown in Table III-6. Oklahoma City multifamily real estate experts report that operating expenses are increasing, leading to increases in rents even as occupancies have dropped. The data indicate that rents have gradually increased in all submarkets since 1999, including the North Central submarket. The highest rents are obtained in the Edmond and Norman submarkets, at $0.69 per square foot for one bedroom units. At $0.63 per square foot for one bedroom units and $0.59 per square foot for two bedroom units, the North Central submarket is mid-priced for the region.

Despite the average rent increases shown in the statistics, multifamily landlords are currently pressured downward on rents. William Forrest of CBRE / Oklahoma reports that competition from the housing market and oversupply in some areas of the region have hurt the financial performance of upscale apartment properties in particular. Owners of these properties are not achieving targeted rents in new properties and are offering more concessions than had been anticipated. Overall, he felt that the high-end apartment market is fairly limited in Oklahoma City.

Table III-6

AVERAGE MULTIFAMILY RENTS BY SUBMARKET, 1999 – 2004

Studios

	Average Rents / Sq.Ft.					
Market Area	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**
North Central OKC	**$ 0.62**	**$ 0.63**	**$ 0.61**	**$ 0.69**	**$ 0.69**	**$ 0.75**
Edmond	$ 0.69	$ 0.74	$ 0.76	$ 0.79	$ 0.80	$ 0.83
Midwest City / Del City	$ 0.56	$ 0.59	$ 0.67	$ 0.66	$ 0.65	$ 0.66
Mustang / Yukon	$ 0.69	$ 0.70	$ 0.70	$ 0.72	$ 0.73	$ 0.77
Norman	$ 0.63	$ 0.69	$ 0.72	$ 0.70	$ 0.75	$ 0.76
Northwest OKC	$ 0.68	$ 0.68	$ 0.74	$ 0.72	$ 0.75	$ 0.75
South OKC	$ 0.64	$ 0.66	$ 0.71	$ 0.70	$ 0.71	$ 0.74
OKC Area Total	$ 0.64	$ 0.66	$ 0.69	$ 0.70	$ 0.72	$ 0.75

One Bedroom

	Average Rents / Sq.Ft.					
Market Area	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**
North Central OKC	**$ 0.56**	**$ 0.57**	**$ 0.59**	**$ 0.61**	**$ 0.61**	**$ 0.63**
Edmond	$ 0.50	$ 0.65	$ 0.68	$ 0.70	$ 0.70	$ 0.69
Midwest City / Del City	$ 0.47	$ 0.51	$ 0.55	$ 0.56	$ 0.56	$ 0.57
Mustang / Yukon	$ 0.58	$ 0.48	$ 0.50	$ 0.53	$ 0.54	$ 0.56
Norman	$ 0.56	$ 0.62	$ 0.66	$ 0.67	$ 0.68	$ 0.69
Northwest OKC	$ 0.51	$ 0.53	$ 0.56	$ 0.58	$ 0.58	$ 0.59
South OKC	$ 0.53	$ 0.56	$ 0.59	$ 0.60	$ 0.61	$ 0.63
OKC Area Total	$ 0.53	$ 0.56	$ 0.58	$ 0.60	$ 0.61	$ 0.62

Two Bedroom

Market Area	Average Rents / Sq.Ft. 1999	2000	2001	2002	2003	2004
North Central OKC	**$ 0.50**	**$ 0.51**	**$ 0.53**	**$ 0.54**	**$ 0.55**	**$ 0.59**
Edmond	$ 0.54	$ 0.57	$ 0.59	$ 0.62	$ 0.63	$ 0.62
Midwest City / Del City	$ 0.46	$ 0.48	$ 0.50	$ 0.51	$ 0.51	$ 0.53
Mustang / Yukon	$ 0.46	$ 0.49	$ 0.50	$ 0.53	$ 0.54	$ 0.55
Norman	$ 0.53	$ 0.51	$ 0.59	$ 0.63	$ 0.63	$ 0.63
Northwest OKC	$ 0.47	$ 0.49	$ 0.51	$ 0.54	$ 0.54	$ 0.55
South OKC	$ 0.50	$ 0.53	$ 0.53	$ 0.54	$ 0.55	$ 0.56
OKC Area Total	$ 0.49	$ 0.51	$ 0.53	$ 0.55	$ 0.56	$ 0.57

Source: Price Edwards & Company

DOWNTOWN HOUSING TRENDS

Development activity

The Downtown Study Area has had, relative to the rest of the MSA, an extremely limited quantity of housing development over the last 40 years. Data provided by the Oklahoma City Planning Department indicate that since 1980, a total of 1,500 units have been permitted as either remodels or new construction in Downtown. However, only 170 permits for 492 units of new residential construction have been issued for Downtown locations during that period. Two complexes, Sycamore Square (permitted in 1981) and Deep Deuce at Bricktown (permitted in 2000), account for the majority of the units built. It should be noted that these building permit totals do not count the 24-unit Garage Lofts, which were not apparently permitted as new residential construction. Outside of the permit activity described above, Downtown's residential stock lies mostly on its fringes, especially in pre-World War II single family homes that are often in states of disrepair. These homes are generally not of great relevance to future housing activity Downtown.

The building permit data are mapped in the following Figures III-1 and III-2, which code the permits by type of structure and date of issuance. The most obvious feature of the maps is the clustering of permit activity into three main areas: the northwest (Sycamore Square and St. Anthony Hospital areas); Deep Deuce on the east side of Downtown; and the older single family area south of IH 40, which was almost totally comprised of remodeling permits.

Figure III-1

DOWNTOWN OKLAHOMA CITY RESIDENTIAL BUILDING PERMITS BY STRUCTURE TYPE, 1980 - 2004

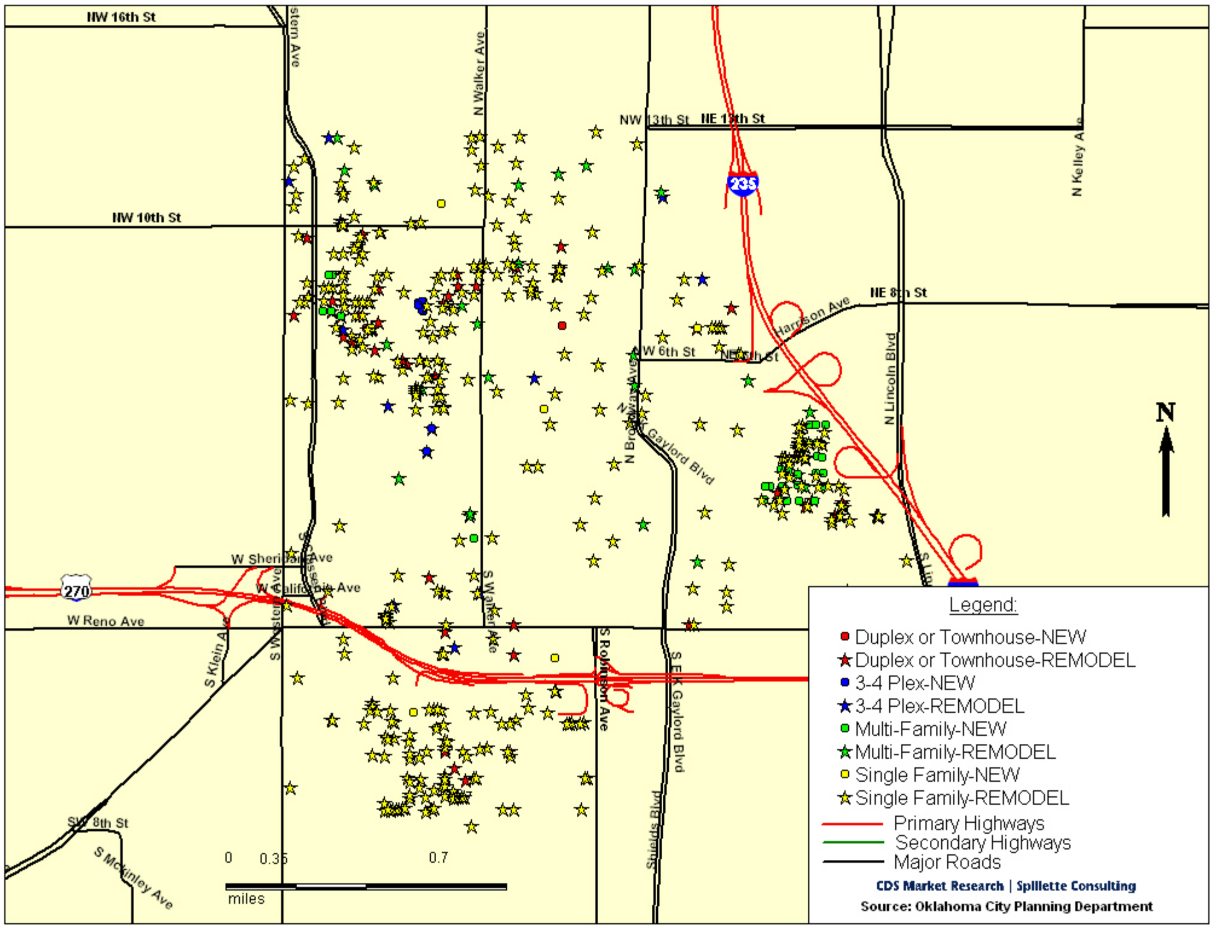
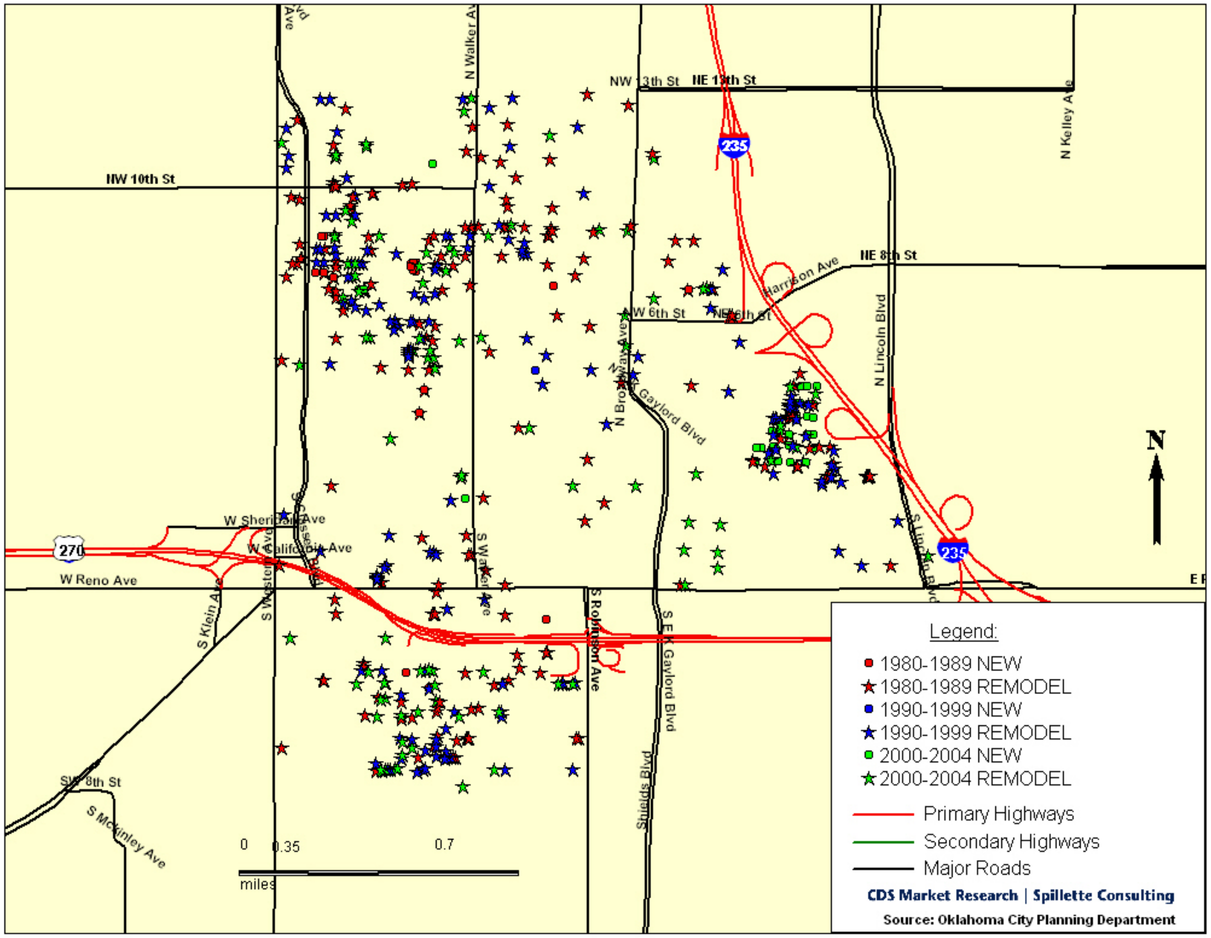


Figure III-2

DOWNTOWN OKLAHOMA CITY RESIDENTIAL BUILDING PERMITS BY PERIOD OF ISSUE, 1980 - 2004



It should be noted that some of Oklahoma City's most desirable "intown" single family neighborhoods lie immediately to the north of the Downtown Study Area, particularly the Heritage Hills neighborhood but also emerging areas such as Mesta Park. Most homes in these neighborhoods were developed during the first half of the 20^{th} century.

Significant Downtown Residential Projects

As mentioned above, there has been relatively little new housing developed in Downtown for the last 40 years, so the roster of Downtown residential properties of significance to this study is short. Table III-7 shows the properties of greatest relevance in Downtown, listed in order of year of development.

The listed projects contain a total of 707 units. It should be noted that the owner-occupied condominium portion of Sycamore Square was not included in this survey. All surveyed projects are rental properties. Interestingly, they represent a wide range of product types – a high-rise apartment tower, low-rise condominiums, industrial-styled lofts, an urban apartment complex, and a historic department store conversion. CDS | Spillette contacted representatives of several of the properties to obtain further information on the nature of current downtown living and residents. Brief notes from this survey are as follows:

Regency Towers. A high-rise apartment tower with 274 units, the Regency Towers is also the oldest of the surveyed properties, having opened in 1965. It underwent renovations after the 1995 Federal Building bombing which occurred within damage range. The property has recently been sold and the new ownership has started another renovation cycle.

The building's occupancy is near the overall market average at 90 percent. Rents (before concessions) are at the upper end of the Oklahoma City market, in excess of $1.00 per square foot for one bedroom units. Rents were increased 2.3% for new move-ins in February 2005 and will be increased again in July 2005. The building is currently offering one-half a month free on move-ins.

Regency staff estimates that about 25 percent of its residents are retired and another 60 percent are professionals aged 30 to 50. The remainder is mostly graduate students. Few tenants have children living with them, and most tenants are single.

Occupations of working tenants range from military (about 10 percent), both enlisted and officers to minor league baseball players to a variety of downtown professionals. These include attorneys (about 10), lobbyists, medical residents (8 to 10), and state senators.

Table III-7

EXISTING DOWNTOWN RESIDENTIAL PROJECTS

Project Name	Type	Yr. Built	# Units	Occ. %	Unit Characteristics			
					Bedrooms	Size (Sq.Ft.)	Monthly Rent	$ / Sq.Ft.
Regency Towers	Apartments	1965	274	90.0%	Studio	392 - 431	$455 - $545	$1.16 - $1.26
					One	570 - 624	$585 - $670	$1.02 - $1.07
					Two	853 - 893	$725 - $810	$0.85 - $0.91
Sycamore Square [1]	Rental condos	1983	59	100.0%	N/A	1,250	$825	$0.66
					Two	1,740	$1,100	$0.63
Garage Lofts	Rental lofts	1995	24	91.7%	Loft	680 - 1,100	$800 - $1,000	$0.80 - $0.85
Deep Deuce	Apartments	2003	294	95.0%	Studio	515	$590	$1.15
					One	649 - 944	$660 - $830	$0.84 - $1.09
					Two	974 – 1,253	$810 - $970	$0.82 - $0.87
					Two + gar.	1,276	$1,125	$0.88
The Montgomery	Apartments	2004	56	94.6%	One	915	$1,060	$1.16
					One	1,333	$1,725	$1.29
					Two	1,228	$1,600	$1.30
					Two	1,500	$2,000	$1.33
		Total	**707**					

[1]Only South section of Sycamore Square is included in this table. North section consists of owner-occupied condominiums.

Source: CDS | Spillette

It is estimated that about half of the residents moved from local origins, often downsizing during the process. Many of the rest are from out of state and were previously homeowners. Elements of Downtown that are popular with residents include Bricktown, the Arts District, and the new library.

Sycamore Square. Developed in the early 1980s, Sycamore Square actually consists of two sections of condominium townhomes, one being all owner-occupied units, the other rental units. The rental portion consists of 59 units, all occupied. A property representative reported that after a multi-year period of flat rents, an upswing has begun over the last several months. The Sycamore units offer the most affordable recently built housing in Downtown, with rents between $0.60 and $0.70 per square foot, in line with top suburban markets such as Edmond and Norman.

The resident profile consists mainly of young professionals, age 25 to 40, and single. A Sycamore representative estimates that less than 20 percent of tenants are retirees. Only a couple tenants have children living with them. Many are medical residents at the Oklahoma Health Sciences Center. Others include military officers and several attorneys. Many moved from other cities where they were used to living in a more urban environment. They enjoy Sycamore's park-like environment in the midst of an urban setting.

Garage Lofts. The only significant Downtown residential project during the 1990s, the Garage Lofts are located at the north end of Downtown in a converted former parking structure on NW 13th Street. Taking advantage of historic tax credits, the project created a unique living environment where tenants may use the still remaining internal ramps to access their units and park literally at their front doors. The loft design, with minimal internal walls or finishes, mean that tenants have great freedom in how they use and configure their spaces, so long as they are not operating them as a place of business. The project has 24 total units, of which 22 or 23 have generally stayed occupied since opening, the vacant spaces representing temporary "frictional" vacancy.

In terms of standard characteristics, the tenant profile spans a wide range. A few tenants have not even used their units as residential addresses, but instead as workshops or similar activities. Typical residential occupancy has had a maximum of two persons in a single unit. Ages have ranged from a late-20s marine captain to empty nesters in their 50s. Interestingly, the developer, Nick Prestakes of Precor Realty, reports that only one tenant is known to work Downtown at the present time. At any one time, there are usually one or two military personnel. The most predominant type of employee is a corporate professional with a taste for individuality. Mr. Prestackes reports that tenants are not moving in from the suburbs; over half are moving in from outside Oklahoma City altogether, often transferred by their company. In summary, the demand for the units is purely lifestyle-driven, with each tenant having a different way to use their unit. He believes a significant segment of the Downtown resident market will be made up of highly discerning buyers or renters seeking unique smaller projects as opposed to large apartment or condominium complexes. He also believes the most important ingredient missing from Downtown is a grocery store, but it is not a serious hindrance.

Deep Deuce. The most significant recent residential project in Downtown has been the Deep Deuce apartment complex just north of Bricktown. Opened in 2003, it is also the largest Downtown project in terms of number of units, with 294. It offers studios, one bedrooms, and two bedrooms, some with garages. With rents for most units ranging from $0.80 to $0.90, the complex is on the upscale end of the Oklahoma City apartment market, although it does not offer the highest rents in Downtown. However, the complex has stayed well-occupied since opening; it is currently about 95 percent. The developer states that the complex obtains a rent premium due to the urban environment unique among recently built apartment complexes. Concessions have recently been minimal or not offered at all. The tenant base is quite diverse and includes doctors, attorneys, marketing / sales executives, students, and military officers.

The Montgomery. Downtown's newest residential property is The Montgomery, a conversion of a historic Montgomery Ward building by Gardner / Tanenbaum Group. In addition to the residential units, the building also contains ground floor retail leased to uses such as a restaurant and a day spa. Opened in the autumn of 2004, the building has 56 units, of which 53 are occupied for a 95 percent occupancy rate. The building offers one and two bedroom units, generally larger than typical units in other properties. Its rents, with one bedrooms starting at $1,060 per month, place the property at the very top end of the rental market in Oklahoma City. Per square foot rents range from $1.16 to $1.33 – about twice the regional average.

The Montgomery also has a diverse tenant profile. Ages range from 25 to 75, but the majority consists of young professionals from their 20s to late 30s. The majority are single, though some married couples are also in the building. There are only one or two families with children.

In terms of employers and occupations, the profile is surprisingly diverse. Tenants include Air Force pilots, attorneys, realtors, doctors, public relations / marketing professionals, and even car dealers and aircraft mechanics. There are also some retirees. Many are in a "transitional" phase of their lives, such as the recently divorced or recently transplanted for work. In fact, a number are newcomers to Oklahoma City (some associated with Dell or Tinker Air Force Base) or past Oklahoma City residents who have recently returned from cities where they were exposed to urban lifestyle concepts. A few have moved in from suburbs such as Edmond and Norman.

Socially, the tenants are described by building representative as having a "work hard, play hard" ethic and like to be very social during their leisure time.

Bricktown is a popular destination with them. They find Downtown to be very upbeat with many positive changes. The major wish for Downtown is to have a grocery store and more neighborhood retail.

Near-Downtown Neighborhoods

As previously mentioned, the residential areas surrounding Downtown generally contain old, low-value single family properties. The exceptions to this are several historically distinctive neighborhoods located primarily to the north of Downtown. The most well-known of these neighborhoods is Heritage Hills, which has long been the city's "silk stocking" neighborhood. Other upscale or up-and-coming neighborhoods in this area or immediately to the north include Mesta Park, Crown Heights, Edgemere Park, and Lincoln Terrace. All of these areas are considered "in-town" neighborhoods with close proximity to Downtown, though technically outside the Downtown Study Area. They are relevant because their target market reflects or overlaps many of the same potential residents for for-sale residential product in Downtown. The home prices in these neighborhoods also indicate comparative benchmarks for Downtown home prices.

Shannon Rundell, a realtor serving these neighborhoods, reports that prices have been going up in recent years, as much as six to eight percent annually. The time on market has also been getting shorter although it is likely still longer than in the rest of the city. These trends indicate that these neighborhoods are increasing in popularity and participating in the same home value trends as the metro area overall.

Heritage Hills offers the most expensive homes. A sampling of Multiple Listing Service activity since June 2004 shows that homes in ZIP code 73103, which contains Heritage Hills, shows that the more upscale homes sold between $180,000 and $450,000, with a few above that range as well. Prices per square foot typically ranged from $80 to $110, with several above that range. In ZIP code 73118 (Crown Heights / Edgemere), prices per square foot were similar to Heritage Hills as were sale prices, although without the very high end sales over $450,000. ZIP Code 73106 (Mesta Park) showed slightly lower values ranging typically from $60 to $80 per square foot with about half the sale prices between $125,000 and $300,000. It should be noted that these ZIP codes also contained a substantial number of low-value homes priced well under $100,000. Only 98 homes over $160,000 in all three ZIP codes sold during the one-year period, so the actual supply of upscale in-town properties for sale is limited.

Ms. Rundell reports that purchasers of homes in these neighborhoods tend to be well-educated, independent professionals, many of them entrepreneurial or with their own practice (doctors, attorneys, etc.) Many were raised in Oklahoma City but have been educated or worked in other cities and enjoy urban districts and are now in their 30s returning to their hometown. Also, she says many sales in the area are to households changing addresses within the same neighborhood because they tend to want to stay there. She has not noticed a large number of Oklahoma City newcomers buying into these neighborhoods.

She reports that large families have not historically been typical of the area, primarily due to the perceived quality of the public schools. However, recent education investments have appeared to be changing this perception for the better and there is more interest in sending children to local elementary schools.

Upcoming Downtown Residential Projects

CDS | Spillette has compiled information on known upcoming residential projects in Downtown. They are summarized in Table III-8. The most significant aspect of these upcoming projects is that the emphasis will be on for-sale units as opposed to rental apartments or lofts. Apart from Sycamore Square, these planned new developments will represent the only significant modern construction for sale in Downtown. If all projects come to fruition, they will add in the vicinity of 700 additional residential units to Downtown.

Table III-8

PLANNED AND PROPOSED RESIDENTIAL PROJECTS

Project Name	Type	# Units	Anticipated Sizes and Pricing
Legacy Summit at Arts Central	Apartments	300	Approx. $1.05 / sq.ft.
Block 42	Townhomes Condo flats	16 26	944 - 2,738 sq.ft. (across both unit types) $150 - $170 / sq.ft.
The Hill	Townhomes	171	1,250 - 2,600 sq.ft. $175,000 - $400,000
Deep Deuce Phase II	Condos	28	800 – 2,500 sq.ft. Approx. $150 - $200 / sq.ft.
The Triangle (preliminary info only)	Townhomes, condos	150 - 200	2,500 - 3,500 sq.ft. $275,000 - $450,000
	Total Units:		
	Rental	300	
	For sale	391 - 441	

Source: CDS | Spillette

Another notable point about the planned projects is their uniformly upscale pricing. The for-sale projects would be in the same price range as homes in the upscale in-town neighborhoods such as Heritage Hills with a much higher price per square foot.

Except for the Legacy Summit apartment project, all of the projects will be located in the area around Deep Deuce, north of Bricktown. A potential effect of this concentration would be to establish the perception of a residential neighborhood in this area as opposed to scattered residential projects within the commercial Downtown environment.

A brief summary of these projects is as follows:

Legacy Summit at Arts Central. In the Arts District, at 4th and Robert S. Kerr Streets on the west side of Downtown, Legacy Summit will be a 300-unit apartment complex. It will also feature retail space on the ground floor and use a cloaked configuration that hides the parking garage inside the block. The project will feature studio, one bedroom, and two bedroom units with average rents anticipated around $1.05 per square foot. The finishes are anticipated to be of high quality. The developer has taken out building permits and is finalizing utility arrangements, and construction is anticipated in the very near term.

Block 42. Located on the north side of 4th Street around the dead end of Central Avenue, a few blocks north of Bricktown, the area known as Block 42 is planned for development into 16 two and three bedroom townhomes and 26 one and two bedroom condominium flats. The developer, Grant Humphreys, states that under the existing preliminary design the units will range from $150 to $170 per square foot. Assuming permitting and construction go as hoped, Humphreys anticipates the first units to be available by late summer 2006.

The Hill. East of Deep Deuce and just north of Bricktown, The Hill is a project of Urban Renewal. The agency, having selected a development proposal from The Canfield Group, approved a plan for 171 townhomes with high-end finished such as 10 to 12 foot ceilings and granite countertops. Exteriors will be of "period-appropriate" design with recessed windows and front stoops. The community will feature a community room and concierge, health facility, and pool. Access to garages will be from gated alleys. Unit sizes will range from about 1,250 square feet to about 2,600 square feet, averaging 2,000 to 2,100 square feet. Prices will range from $175,000 to almost $400,000. Developer representatives state that they are targeting young professionals without children, empty nesters, households in transition such as divorcees, and well-funded medical students. The developer believes a large amount of positive synergy is occurring in Downtown that will increase residential demand, but the area needs a high-quality grocery store and more "high tech" employers in the central business district. A strong local elementary school would also be a benefit.

Deep Deuce Phase II. Somerset Partners plans to add 28 for-sale condominium units to the Deep Deuce area at 4th Street and Central Avenue. They expect to break ground during autumn 2005. The project will offer one and two bedroom units ranging from 800 to 2,500 square feet and priced at $150 to $200 per square foot.

The Triangle. In the blocks bounded by 4th and 2nd Streets on the west side of Walnut Avenue, a group of investors is planning an urban neighborhood on several land parcels, including parking lots owned by Kerr-McGee. The project will ultimately contain 150 to 200 townhomes and condominiums, depending the final master plan for the area. Phase I is projected to consist of 60 “brownstone” townhouse units that are hoped to be completed by the end of 2006. Another 75 of these units are planned. Additional units may be condominiums, possibly including some in mixed-use structures. The public environment will receive particular attention in order to create a compelling urban atmosphere; streetscapes improvements and new parks will be included in the plan. In addition, a pedestrian bridge on Oklahoma Avenue will connect the project with Bricktown. The developer will be doing further market research to finalize unit sizes and prices, but currently it is projected that they will range from 2,500 to 3,500 square feet in size and $275,000 to $450,000 in price.

Near-Downtown projects. It is possible that centrally located, urban-styled residential developments could represent competition for new development Downtown. The only known project at the present time that fits this description is The Classen, a condominium renovation of a former office tower on North Classen Street near 22nd Street, north of Downtown. Unit sizes and prices were being modified at the time of this report but are expected to be 1,100 to 1,400 square feet with prices starting at around $160,000. The developer, the Gardner / Tanenbaum Group, hopes to have the first units ready for move-in by the end of 2005.

Downtown Residents Survey

To further understand the market dynamics of the existing Downtown housing market in Oklahoma City, CDS **|** Spillette conducted a survey of existing Downtown residents. The full results of this survey are shown in the Appendix. Key findings of special significance to projections of future demand and strategies to maximize demand are summarized here.

Work location. One of the most significant survey findings was that the vast majority of respondents (82 percent in the sample) do not work Downtown. A related question regarding the motivation for living Downtown indicated that only about a quarter of the sample (24 percent) chose their location because of proximity to work or school. The following table summarizes the survey’s findings for this question:

Table III-9

DOWNTOWN RESIDENTS' REASONS FOR LIVING DOWNTOWN

Proximity to things going on downtown	18%
Proximity to work	**16%**
Found a house I liked downtown / liked downtown housing	16%
Liked the area / neighborhood	14%
Married into it / family house	10%
Close to school	**8%**
Not expensive / affordable	8%
Historic homes	4%

Base = 49
All other responses 1 respondent only.

Source: CDS | Spillette

Given that the Oklahoma City MSA is mid-sized by national standards and does not have an excessive traffic congestion burden, these finding are not surprising. Clearly, the key factors driving Downtown housing demand have to do with lifestyle or aesthetic concerns rather than minimizing commute time.

Factors driving demand. In fact, Downtown's amenities appear to be the biggest attractor of residents, plus the fact that it is relatively easy to live Downtown and reach other parts of the region, as the following results indicate:

Table III-10

ADVANTAGES TO LIVING IN DOWNTOWN OKLAHOMA CITY

I'm close to downtown activities and resources	**43%**
I'm near my job/school	29%
I like the overall central location	**27%**
I like the historic neighborhood/housing	20%
I like the neighborhood/neighborhood features	**10%**
Affords easy access to highways/freeways	**10%**

Base = 49
All other responses 2 respondents or fewer.

Source: CDS | Spillette

Disadvantages to Downtown. A similar question was asked regarding the disadvantages to living Downtown. Crime-related concerns were most frequently mentioned (29 percent of the sample), with a lack of grocery stores the second most frequent at 16 percent. However, when asked about needed improvements for Downtown, better shopping and grocery stores accounted for far and away the most desired improvements as indicated in the following table.

Table III-11

SUGGESTED IMPROVEMENTS FOR DOWNTOWN OKLAHOMA CITY

More/better selection of shopping facilities	**29%**
Better/cheaper parking	16%
Continue enhancing cultural development/activities	10%
More grocery stores	**8%**
Law enforcement/less crime	8%
Improve streets/traffic	8%
Improve public transportation	6%
Better/more/different housing options	6%
Don't know	6%
Nothing	8%

Base = 49
All other responses 2 respondents or fewer.

Source: CDS | Spillette

This finding regarding the need for more Downtown retail echoes the results of interviews with existing residential property representatives, several of whom commented that shopping and grocery stores in particular were the most important shortcoming of Downtown today. Still, although shopping may be inconvenient for Downtown residents, very few appear to be bothered enough to leave; only 6 percent of the sample stated that they intended to move their residence out of Downtown in the next one or two years.

One final point regarding the resident survey was a profile of the respondents' education levels. An astonishing 43 percent of the sample had a post-graduate degree, and 61 percent had at least an undergraduate degree. To the extent that this sample can be extrapolated to the general Downtown resident population, it would appear that Downtown attracts well-educated individuals to be residents. This corroborates anecdotal findings of property representative interviews and the opinion of a real estate agent in nearby established neighborhoods.

Summary of Current Downtown Market

In summary, the finding of the resident survey and the interviews with property residents and developers indicate that the bulk of demand for Downtown housing is driven by residents working all over the MSA who are opting for an urban environment as opposed to trying to minimize their commute. Many of these "lifestyle" residents may have lived in other cities where such environments were more prevalent. Still, the frequency of doctors, attorneys, and medical students in current Downtown residential properties indicates that employment in Downtown and around the Health Sciences Center does provide a significant source of potential demand. The military is another source of potential residents. Residents are taking advantage of recent improvements to Downtown, especially

Bricktown. Based on this current demand profile, demand for Downtown rental housing has been fairly strong, with all projects leased at or above area averages while obtaining relatively high rents. This leads to the following questions to guide further analysis:

- How much unsatisfied demand for Downtown housing is there at present, for both rental and for-sale product?

- Given current conditions Downtown and projected trends in regional employment, how much is this demand likely to grow?

- How sensitive is Downtown housing demand to price / rent levels?

- How much would improving retail options and other aspects of Downtown affect demand levels?

These questions will be addressed as part of the next section of this report.

Section IV

PROJECTED DEMAND FOR DOWNTOWN HOUSING

A projection of the overall demand for housing in Downtown Oklahoma City would ideally be based on three categories of information:

1. Projected regional economic and population trends;
2. A recent history of market preferences for existing Downtown housing as an indicator of future preferences; and
3. Any additional information on market preferences, such as through consumer surveys.

The first category was covered in Section II. Unfortunately, the second category has very limited applicability in Oklahoma City. The supply of relevant housing stock is so limited, and much of it so new, that creating definitive assessments based on the market performance of those projects is very difficult. This places even more importance on the third category – in this case, the consumer survey CDS **|** Spillette performed in May of 2005.

In this section, projections of future economic and demographic conditions provide the basis for applying factors derived from the consumer survey and from U.S. Census data. After adjusting factors for various sensitivities characterizing the Oklahoma City market, projections of future Downtown housing demand are derived. It is vital to keep in mind that these projections represent only the order of magnitude of demand and not exact projections. In addition, the projections themselves have many considerations that would tend to raise or lower the quantity of demand.

NON-DOWNTOWN RESIDENTS SURVEY

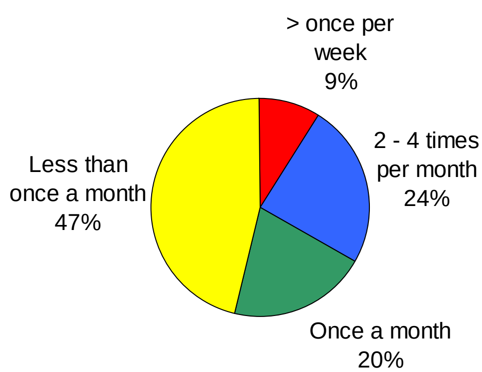
CDS **|** Spillette conducted a consumer survey of residents living in the Oklahoma City region outside of Downtown in May of 2005. The information gathered in the survey provided insight into these residents' perceptions of Downtown, the likelihood that they would consider living Downtown, and some characteristics that would be most valued in a Downtown residence. The full results of the survey are included in the Appendix to this report. Selected results of greatest relevance to the analysis of projected Downtown housing demand are highlighted here.

Existing Role of Downtown in Residents' Lives

One finding of the survey is that Downtown plays a small role in their lives of a majority of the region's residents. Only 16 percent of respondents work Downtown. As Figure IV-1 shows, over two-thirds of respondents visit Downtown no more than once a month. This means that many of the region's residents may not be fully aware of the evolution of Downtown as improvements are made.

Figure IV-1

FREQUENCY OF VISITS DOWNTOWN



Source: CDS Market Research | Spillette Consulting

When respondents do visit Downtown, by far the leading reasons for visiting involve leisure activities, as shown in Table IV-1 below. Downtown is mostly known as a place to have fun. While this is a positive perception for Downtown to give to the region, it does not necessarily directly translate into the perception of Downtown as a directly place to live.

Table IV-1

DOWNTOWN ACTIVITIES PURSUED

Eating out	79%
Sporting events	61%
Festivals or parades	53%
Sight-seeing	53%
Theater or movies	48%
Parks and recreation	35%
Shopping	28%
Government services	24%
Library or learning activities	20%
Medical/health care	20%
Night clubs	18%
Banking/personal finance	8%
None	5%

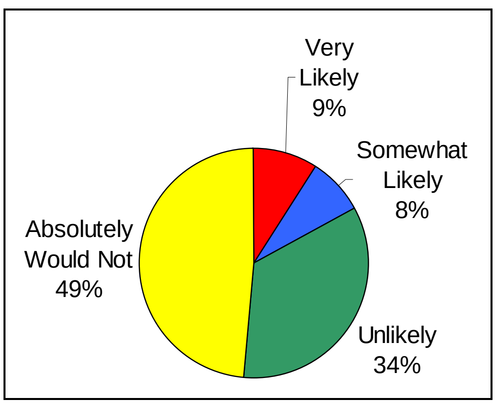
Base = 350
Source: CDS Market Research | Spillette Consulting

Propensity to Live Downtown

CDS | Spillette posed the question of how likely respondents would be to move Downtown, given the scenario that "housing that fits your needs were available downtown at a price or rent that you could afford." The results of this question are indicated in Figure IV-2. When the sample results are adjusted to match the estimated actual renter / owner split of the MSA population, an estimated 17 percent of residents would be at least somewhat likely to move Downtown.

Figure IV-2

LIKELIHOOD TO MOVE DOWNTOWN



Sample results weighted per estimated renter/owner split.
Source: CDS Market Research | Spillette Consulting

A more refined examination of the data reveals an important distinction between respondents who rent and respondents who own their dwelling. Renters were four and half times more likely to give a "very likely" response about moving Downtown, as shown in Table IV-2:

Table IV-2

LIKELIHOOD TO MOVE DOWNTOWN: OWNER VS. RENTER

	Own	Rent
Very likely	**4%**	**18%**
Somewhat likely	8%	9%
Unlikely	39%	27%
Absolutely would not	50%	45%
Base	222	132

Source: CDS Market Research | Spillette Consulting

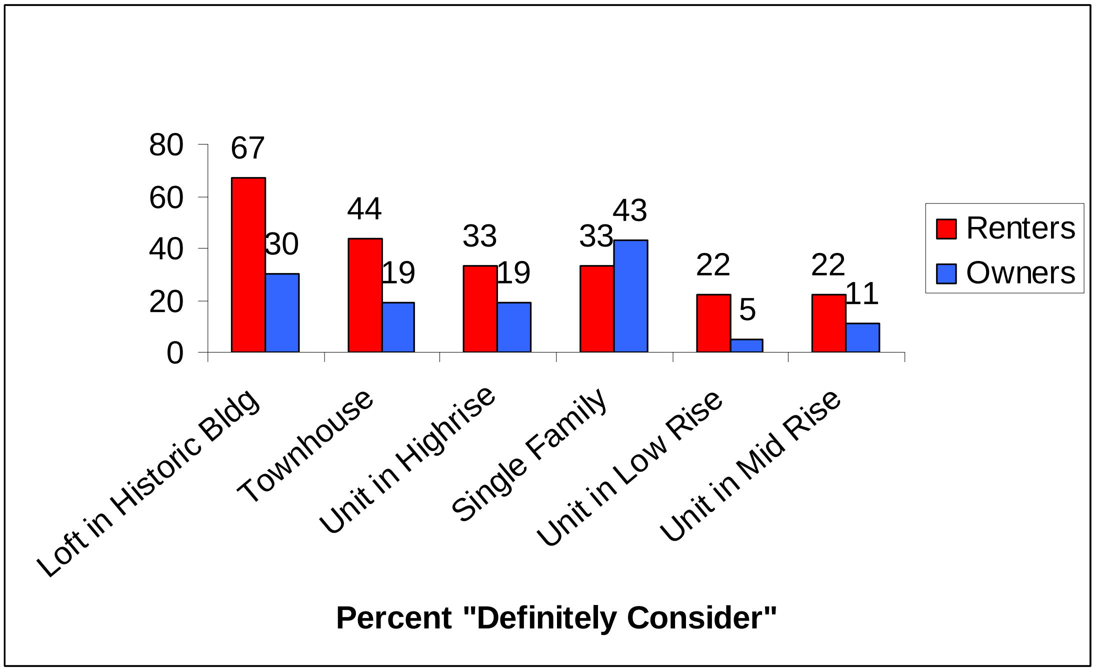
In addition, 89 percent of renters who responded that they are likely to move Downtown were ready to move within a year, which could indicate a strong amount of pent-up demand for Downtown rental housing. In contrast, just 22 percent of home owners likely to move Downtown indicated a similar time frame.

Type and Cost of Housing Desired

Respondents indicated a strong desire for historic properties. Figure IV-3 shows how respondents rated the desirability of different types of housing. Lofts in a historic building ranked as the most desired product among renters. Low-rise and mid-rise units ranked as the least attractive. For respondents who were homeowners, single family homes ranked highest. In the following Figure IV-4, when respondents were asked to describe the age of their desired housing, 41 percent indicated historic; only 24 percent specifically desired new construction.

Figure IV-3

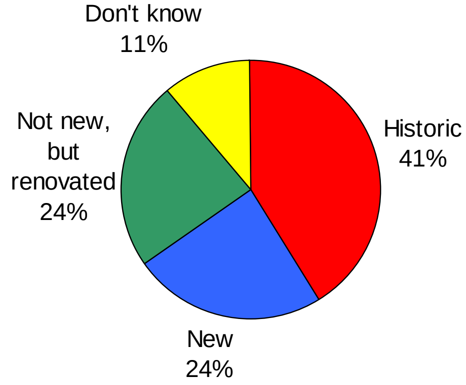
TYPE OF HOUSING LIKELY TO CONSIDER



Source: CDS Market Research | Spillette Consulting

Figure IV-4

DESCRIPTION OF DESIRED HOUSING



Source: CDS Market Research | Spillette Consulting

Larger housing units were also preferred, as shown in Table IV-3. Three bedroom, two bath units were ranked as most desirable, especially by younger age groups, possibly because they anticipate having children or working at home. Two bedroom, two bath units were the second most preferred, with older age groups especially attracted to this configuration. Other configurations, mostly with fewer bedrooms and / or baths, appeared to be a significantly lesser choice for the respondents.

Table IV-3

PREFERRED HOUSING CONFIGURATION

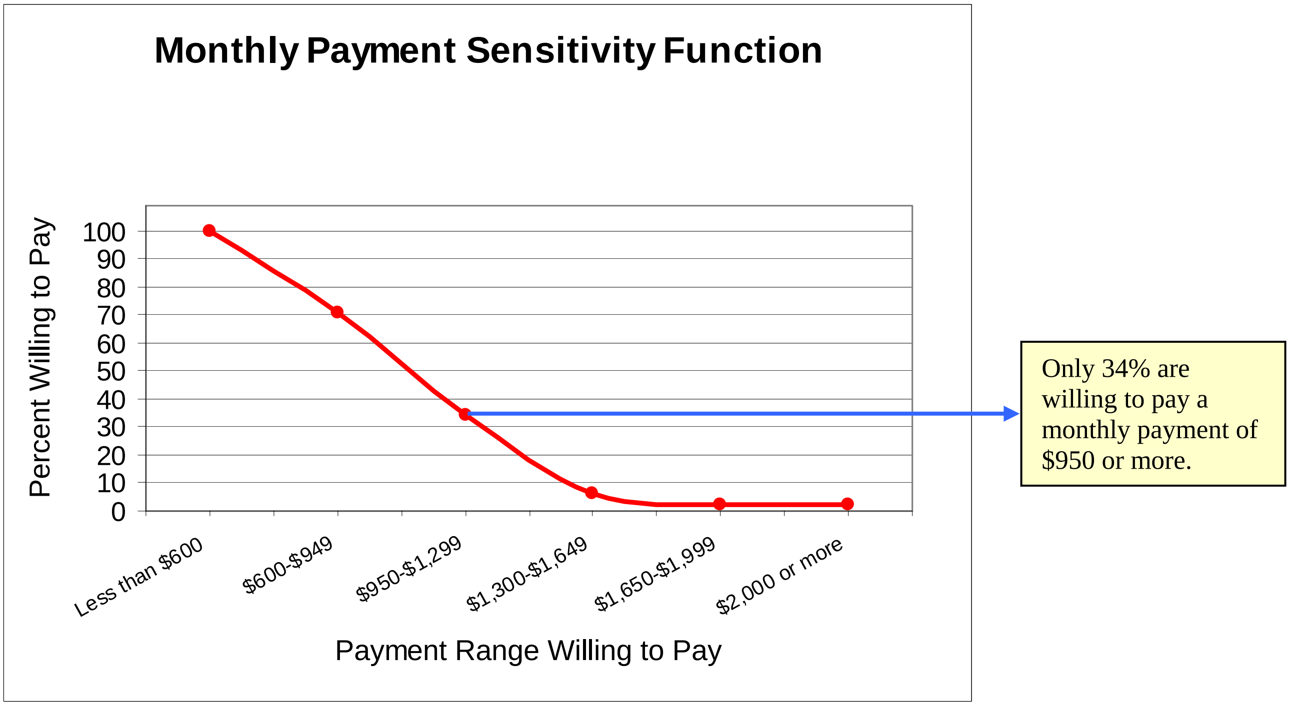
Configuration	% Preferring
3 BR, 2B	39%
2 BR, 2B	26%
4 BR, 2B	13%
2 BR, 1B	7%
2 BR, 1.5B	4%
1 BR, 1B	4%
3 BR, 2.5B	2%
Other	4%
Base	(46)

Source: CDS Market Research | Spillette Consulting

Regarding monthly payments, respondents clearly preferred the lower end of the scale, with only 34 percent of respondents willing to pay a monthly payment of $950 or higher, as shown in Figure IV-5. For renters, this result is not dissimilar to the results of their actual current rent levels; only 27 percent of responding renters paid over $1,000 per month. For homeowners, $950 monthly payment would represent an approximately $160,000 mortgage (30-year fixed at 5.9 percent, not including taxes and insurance). Interestingly, given the rent levels at recently developed Downtown residential properties and information on the likely pricing for upcoming new development (see Section III), the monthly payments preferred by the majority of respondents would not likely be sufficient for the unit configurations deemed most desirable. This raises a significant question of affordability even for those residents who might be inclined to move Downtown.

Figure IV-5

PREFERRED MONTHLY PAYMENTS



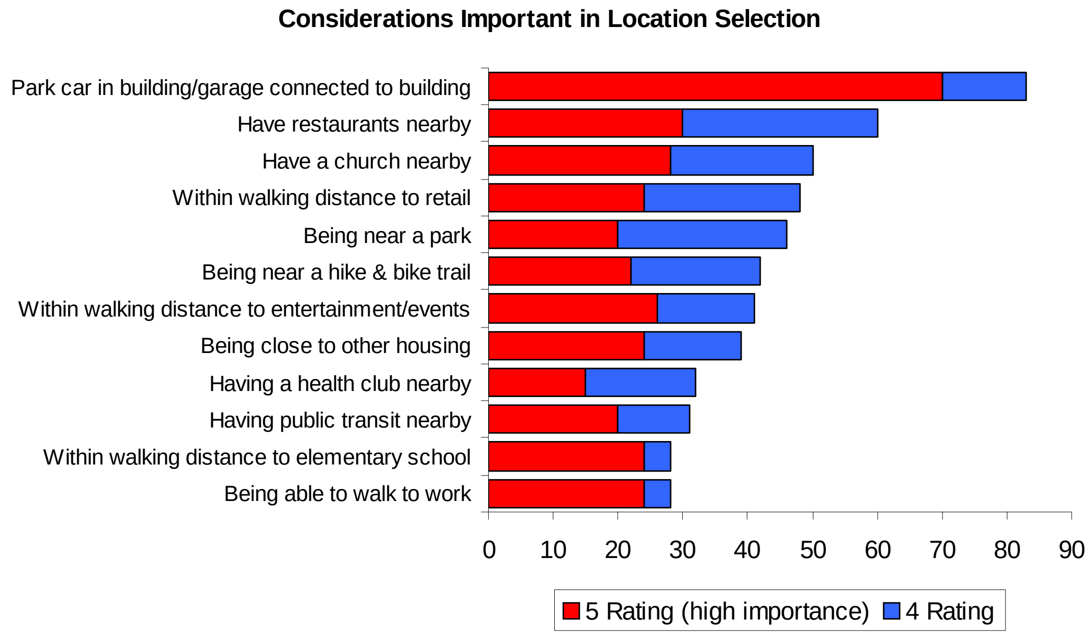
Source: CDS Market Research | Spillette Consulting

Other Preference Considerations

Other relevant findings of the survey included parking preferences and neighborhood characteristics. Regarding parking, the survey found clear preferences: of respondents likely to move Downtown, 70 percent desired garage parking and 70 percent also desired two parking spaces with their unit. Parking is also the most important reason cited in selected a location within Downtown to live – one a 1 to 5 scale, 5 being of highest importance, 83 percent of potential Downtown dwellers rated a contiguous parking facility as rating a 4 or 5. It was by far the most important factor, with nearby restaurants the second most important factor at 60 percent. Figure IV-6 shows the relative scores of various locational criteria.

Figure IV-6

CONSIDERATIONS IMPORTANT IN LOCATION SELECTION



Source: CDS Market Research / Spillette Consulting

As far as potential Downtown residents felt about different areas within Downtown, the Bricktown area was rated highest, with 50 percent rating it their first or second choice. This is not surprising because Bricktown is likely the best-known Downtown place to many folks who visit Downtown only occasionally to patronize restaurants or nightclubs. Interestingly, Deep Deuce and the Flatiron District, just to the north of Bricktown and the location of the majority of planned new construction, rated among the least favorable of any districts listed.

ANALYSIS OF PROJECTED DEMAND

The results of the consumer survey provide the factors for making a base projection of potential Downtown housing demand. In response to the differences in the preferences of renters and home owners, as noted above, CDS | Spillette performed separate base analyses for rental housing and for-sale product.

A key point about these projections is that they represent a *relative order of magnitude*, not exact projections. The standard error of the survey and the variability inherent in many factors of the urban environment and the real estate market mean that the numerical results should be viewed as general indicators of demand rather than specific quantities.

Rental Demand

Base analysis. The base analysis for rental housing in Downtown is shown in Table IV-4. An outline of the analysis steps are as follows:

1. The Oklahoma Department of Commerce's population projections are used as the initial demand factor for years 2005, 2010, and 2015.

2. An examination of past, estimated current, and projected average persons per household led CDS | Spillette to use 2.47 persons per household as the factor to allow conversion of projected population to projected households. This factor was used for all three analysis years.

3. Total households are multiplied by the current estimated rental households' share of total households, in this case 34.4 percent. The result is the projected number of rental households in the MSA.

4. The survey results showed that 18 percent of renter respondents would be very likely to move Downtown (given the right housing products at the right price), and another 9 percent would be somewhat likely to move Downtown. CDS | Spillette conservatively used a figure of 16 percent to estimate renter households that would likely move Downtown under the given housing supply condition.

5. The given housing supply condition to the likelihood of moving Downtown (if the respondents "found housing that fits your needs *at a price or rent you can afford*," [italics added]) means that the resulting number of households must be adjusted downward to reflect the fact that not all households will be able to afford typical rents for new Downtown housing (Deep Deuce and The Montgomery being the primary examples). An examination of Downtown rents, the average regional rents, the 2000 Census statistics for household income, and the rent levels quoted by survey respondents (64% paid under $1,000 per month) led CDS | Spillette to conservatively estimate that 30 percent of those likely to move Downtown could actually afford the rent in market-rate housing. This percentage was applied to the total interested Downtown households to arrive at a final base projection for each year.

The results indicate a strong potential for Downtown rental housing development. At the present time, the analysis indicates that there is demand for about 7,500 households to move Downtown. Furthermore, another survey result (not shown in Table IV-4) indicated that the vast majority of renters (89 percent) interested in living Downtown would move within one year. Over the following ten years, rental demand rises by several hundred units. Even in 2015 however, the bulk of Downtown rental demand comes from pent-up demand that exists today. It is vital to keep in mind that these projections indicate an *order of magnitude*, not a specific quantity of demand. Thus, it would be reasonable to say that the analysis finds potential demand for Downtown rental housing of 6,000 to 9,000 units.

Table IV-4

BASE PROJECTION OF POTENTIAL DOWNTOWN RENTAL HOUSING DEMAND

	Analysis Year			
	2005	**2010**	**2015**	**Notes**
Total population	1,128,728	1,171,728	1,211,329	From OK Dept. of Commerce
Population per household	2.47	2.47	2.47	From Census / Claritas / ACOG
Total households	456,975	474,384	490,417	
Renter share	34.4%	34.4%	34.4%	From Claritas
Total Households	157,199	163,188	168,703	
Likely to move / live Downtown	16%	16%	16%	From survey (adjusted)
Potential households	25,152	26,110	26,993	
% affording	30%	30%	30%	CDS | Spillette estimate
Net demand	**7,546**	**7,833**	**8,098**	

Source: Oklahoma Department of Commerce; US Census 2000; Claritas, Inc.; and CDS Market Research | Spillette Consulting

For-Sale Housing Demand

The base analysis of for-sale housing demand in Downtown follows the same process as did the rental housing analysis, with some specific factors changed. One is the proportion of owner-occupied households in the region. The next is percentage of the region's residents likely to move Downtown; the survey indicated that 4 percent were very likely and 8 percent were somewhat likely, much lower percentages than for renters. CDS | Spillette conservatively used a 5 percent likelihood factor in the analysis.

The affordability factor is much more difficult to estimate. The prime market for for-sale product, especially the relatively high-priced product current being proposed for Downtown, is likely to be older buyers, such as those whose households no longer have school-aged children or who are coming out of a divorce. For this age group, affordability is as much a function of wealth as of income; they may be able to afford more upscale units than their income indicates because they are trading out equity gained from the sale of their previous home. Based on U.S. Census statistics, current average home prices, and the likely price levels of planned for-sale Downtown housing developments, CDS | Spillette used an affordability factor of 30 percent, the same as for rental housing.

Table IV-5 gives the analysis for for-sale housing demand. Despite the much broader base of owner-occupied households in the region from which to draw, the total Downtown demand is smaller than for rental households because the propensity to live Downtown, as revealed in the consumer survey, is much lower. Total for-sale demand for 2005 is estimated at about 4,500 units. Again, this is subject to the condition of the *right product* at the *right price*, partially accounted for by the affordability factor in the analysis. Total supportable demand is projected to grow slowly over the next ten years by a few hundred units. In the near term, the survey indicated that a relatively small share of the potential market – 22 percent - was likely to move within a year. This would equate to about 1,000 homes at the present time. As with the rental demand projections, it is important to note that these quantities represent an *order of magnitude*, not specific amounts.

Table IV-5

BASE PROJECTION OF POTENTIAL DOWNTOWN FOR-SALE HOUSING DEMAND

	Analysis Year			
	2005	**2010**	**2015**	**Notes**
Total population	1,128,728	1,171,728	1,211,329	From OK Dept. of Commerce
Population per household	2.47	2.47	2.47	From Census / Claritas / ACOG
Total households	456,975	474,384	490,417	
Owner share	65.6%	65.6%	65.6%	From Claritas
Total Households	299,776	311,196	321,713	
Likely to move / live Downtown	5%	5%	5%	From survey (adjusted)
Potential households	14,989	15,560	16,086	
% affording	30%	30%	30%	CDS | Spillette estimate
Net demand	**4,497**	**4,668**	**4,826**	

Qualifiers and Adjustments to Potential Demand Projections

An existing potential demand of the magnitude shown by the analysis is very positive news for Downtown housing developers. It is supported, at least at a very preliminary level, by the strong health of the existing (relevant) Downtown rental housing stock. However, other factors beyond the base analysis will affect future demand and must be considered.

Housing type. As noted earlier in this Section, different types of potential Downtown housing are viewed differently by consumers. Renters showed a strong affinity for historic loft projects, with townhomes their second most desired housing type (see Figure IV-3). The existing proposed housing developments Downtown are mostly of the townhome type, but all of these will be for-sale product. The only rental project currently planned, Legacy Summit, would be classified as a low or mid rise product, the least favored type among renters. Home owners, on the other hand, preferred single family, none of which is proposed in any quantity Downtown and would more likely entail the renovation or redevelopment of an older existing single family property. For home owners, townhomes are much less favored. In addition, the unit configuration preferences from the survey (see Table IV-3) showed that three and four bedroom units were two of the three most desired categories, the other being two bedroom two bath units.

Thus there is a potential disconnect between what survey respondents envisioned as their Downtown residence and what the market is likely able to provide. Single family detached homes and three and four bedroom units are difficult to build Downtown because of parcel size and land availability, land prices, and other reasons. The supply of historic buildings to convert to lofts is likely limited. New construction rental developments are typically built as low or mid rise complexes. In summary, these housing type considerations likely serve as a constraint on actual demand, meaning that demand is probably lower than the base analyses indicated.

Housing prices and interest rates. The affordability factor in the base analyses helped to account for some of the pricing factors that will affect Downtown housing demand. The CDS **|** Spillette estimate of that factor, however, assumes Downtown housing rents and prices not significantly different from that offered today or planned for the near future. If developers are able to bring housing product to market that is priced more affordably, the projected demand could increase.

Experience from other cities indicates that multifamily residential units located in attractive, mixed-use urban environments obtain a rent or price premium over standard suburban complexes, so there may be constant pressure to raise prices in Downtown. Also, because of the perceived benefits of being in a high quality urban environment, consumers may be willing to pay a relatively higher share of their income for Downtown housing than they would outside Downtown. This would also serve to increase demand (higher supply of willing renters / buyers at a certain price). However, there is no evidence at present of any plans to offer product that is priced closer to regional market averages. In addition, for-sale housing faces competition from near-Downtown neighborhoods like Mesta Park and Heritage Hills that offer competitively priced single family homes.

A third factor regarding affordability relates to the relationship between the rental and for-sale housing markets. A major source of competition for the upscale rental market is for-sale homes that are favorably priced due to low mortgage rates. The analyses assume that real interest rates will remain relatively constant, which is of course unlikely. A rise in interest rates would likely mean a reduction in potential for-sale housing demand and increase in potential rental unit demand, especially for younger households that do not already own a home.

Employment trends. The potential demand analyses also assume that the employment will increase as projected (see Section II). Disruptions of the local or national economy could mean a reduction in overall Downtown housing demand (concurrent with a reduction of regional housing demand). In contrast, an increase in hiring of college-educated professionals, especially by but not limited to Downtown employers, could make a significant impact on the Downtown housing market. Furthermore, if such hiring brings in a significant number of employees who have lived in urban environments elsewhere, Downtown housing demand could be further enhanced.

The two consumer surveys and research on existing Downtown residential properties showed that potential Downtown housing demand is not heavily dependent on Downtown employment, but expected hiring by employers in the Medical Center area could have strong positive impacts on Downtown housing demand. The same goes for government agencies to the extent that they are hiring young, well-paid workers. Conversely, stagnation or reductions of employment among these groups of employers could have a magnified impact on Downtown housing demand.

Age trends. The change in demand projected in the analysis from 2005 to 2015 was not large. However, trends in population aging may have at least small impacts on housing demand. Both the key age cohorts – the 25 to 39 age group and 55 to 64 group – are projected to increase in population until 2010 (see Section II). As part of the baby boomers, the older group is projected to continue increasing its population from 2010 to 2015, while the 25 to 39 group will stagnate or even decline during that period. The younger group will be a major driver for rental housing demand, while the older group is more likely to be influencing the for-sale market. The sheer quantity of growth in the 55 to 64 bracket means that potential demand for Downtown for-sale housing may be higher than was indicated by the base analysis.

Neighborhood development. The survey respondents based their answers on their current perception of Downtown, which today is not known as a residential neighborhood. If enough Downtown housing is successfully developed so that a true residential district is created, along with associated commercial uses and amenities, the interest in Downtown residency may increase. Residents of the region who would now be hesitant about living Downtown as a "pioneer" might change their mind if Downtown offers a cohesive neighborhood. In addition to residential rooftops, the addition of key convenience retail such as a grocery store in Downtown could have a strong impact on demand. Home buyers would be particularly reassured as their perceived risk of investment would decline. The Deep Deuce / Flatiron area would seem to be the first part of Downtown that could have this potential.

All anecdotal evidence gathered during research indicates that households with school-age children would not be likely candidates for a Downtown residence. However, this could change if a strong neighborhood elementary school was developed. Other cities such as Memphis and Chattanooga have taken this approach. The main beneficiary of increased residential demand would likely be for-sale housing. Other family-friendly amenities such as parks and playgrounds would also need to be implemented to fully realize potential interest from families.

Projected Absorption

A projection of annual absorption drawing from the base analyses and the qualifiers and adjustments is a difficult task. It would seem from the base analysis that such a large amount of pent-up demand exists that potentially thousands of units could be built in the immediate term and be easily brought to full occupancy. However the qualifiers and adjustments just outlined cloud the picture somewhat; the extent to which they affect the proposed developments is not quantifiable given existing information. Despite these uncertainties, CDS | Spillette is making order of magnitude projections of potential residential absorption in Downtown.

Because of the "friction" associated with moving one's residence, the actual number of households actively looking for a Downtown residence at a certain time (assuming product was available) is likely less than the base analysis would indicate. In addition, it may be unwise to bring too much residential product to the Downtown market at once even with much pent-up potential demand. For example, in Washington DC, which has a much more pressured housing market than Oklahoma City and much demand for in-town living, several thousand units of housing were built Downtown in a relatively short time period. The result was an overly competitive market that negatively affected rents and occupancies for the developers, despite the overall regional housing market conditions.

Based upon the base analysis and the other considerations outlined above, CDS | Spillette's projection of the maximum supportable absorption is as follows:

Table IV-6

PROJECTED ANNUAL SUPPORTABLE ABSORPTION OF DOWNTOWN HOUSING, 2005 - 2015

	Housing Units per Year	
	2005 – 2010	**2010 – 2015**
Rental	300 – 500	150 – 350
For-sale	150 – 350	200 – 400

These projections reflect downward adjustments of the base potential demand analyses. This is due to the qualifying factors described above, particularly regarding housing type, prices, and the expected leveling-off of growth in younger and middle-aged age cohorts. It also reflects the judgment of CDS | Spillette, based on professional experience in and research on other cities. While overall demand gives strong reason for optimism, actual absorption rarely achieves such a projected quantity immediately. The projection of average absorption over the first five-year period above represents a relatively “safe” level. Still, the possibility of a “mini boom” over the next one or two years remains. In the outlying years, projected for-sale absorption was increased to account for the continued swelling of the “empty nester” market segment population and the increased appeal of Downtown as a more established neighborhood.

Downtown Oklahoma City, Inc.

Downtown Housing Demand Study – Appendix
Oklahoma City, Oklahoma

July 2005

CDS Market Research | Spillette Consulting
An Alliance for Strategic Urban Consulting Services

030519

Appendix: Survey of Oklahoma City Residents

I. Information Objectives

For residents living in downtown Oklahoma City, explore…

- Characteristics of current residence
- Opinions about living downtown
- Housing intentions during the next one to two years
- Demographics

For non-downtown residents of Oklahoma City, explore…

- Characteristics of current residence
- Current downtown involvement
- Living downtown in the future: intentions and considerations
- Demographics

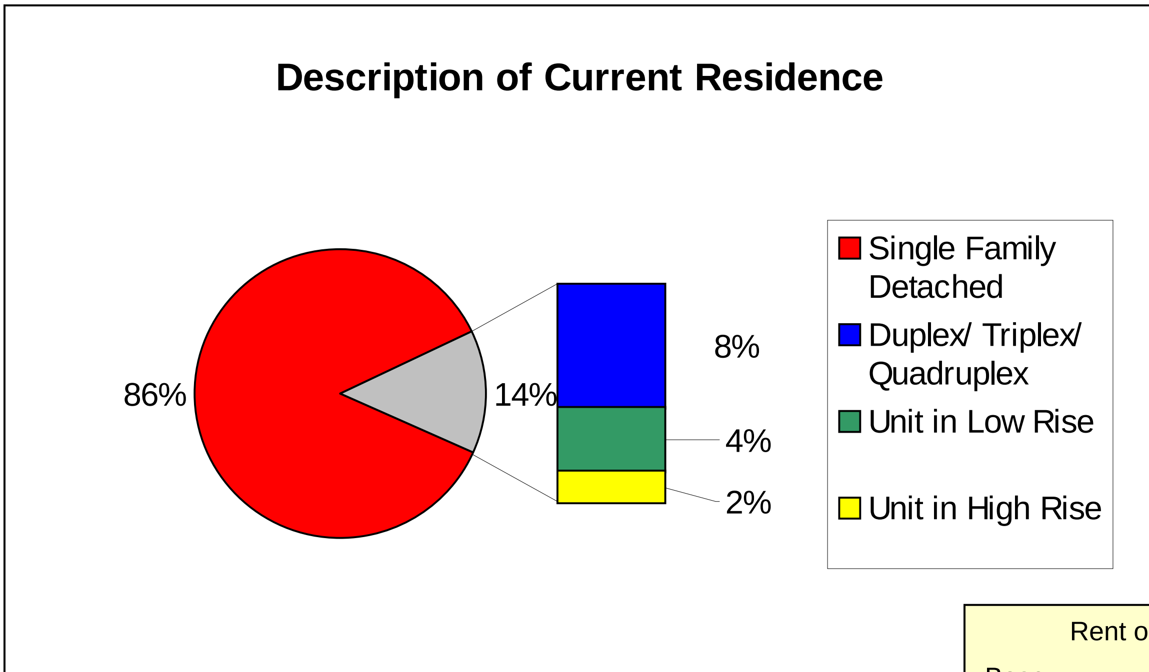
II. Research Methods

The survey was implemented by telephone interviewing methods. A total of 400 interviews were conducted: 50 with residents who currently live downtown and 350 who live outside the Oklahoma City downtown area.

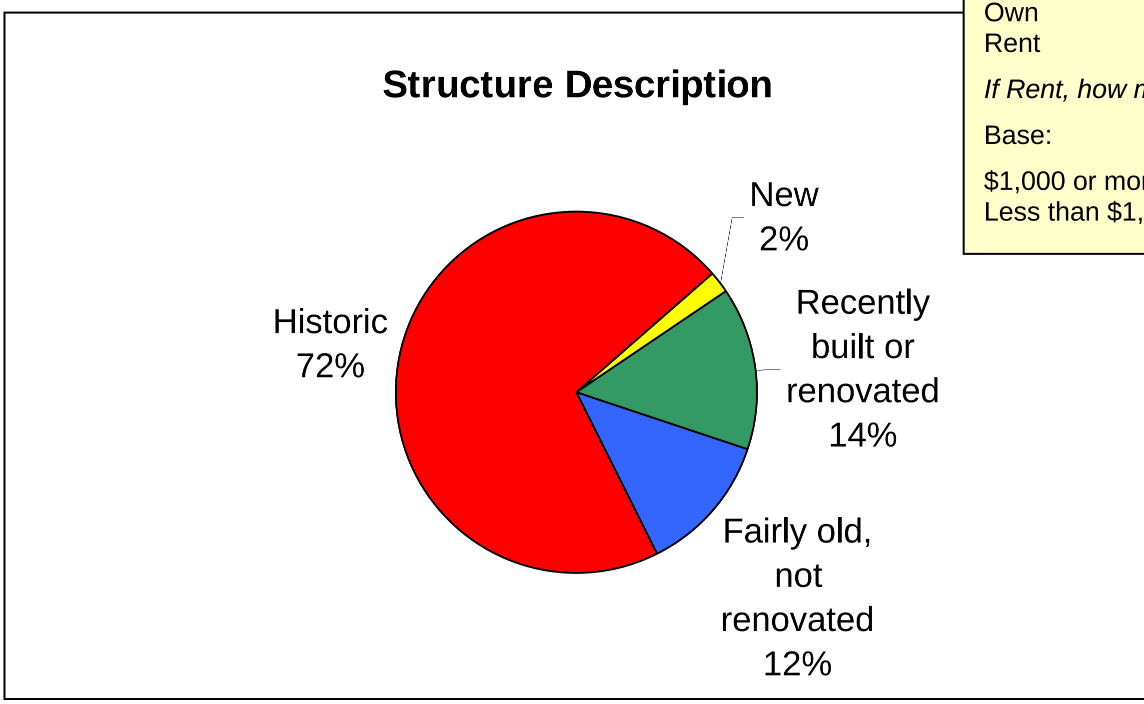
The sample was randomly drawn from residents who list their telephone numbers in the telephone company white pages. Interviewing conducted in late May through early June 2005.

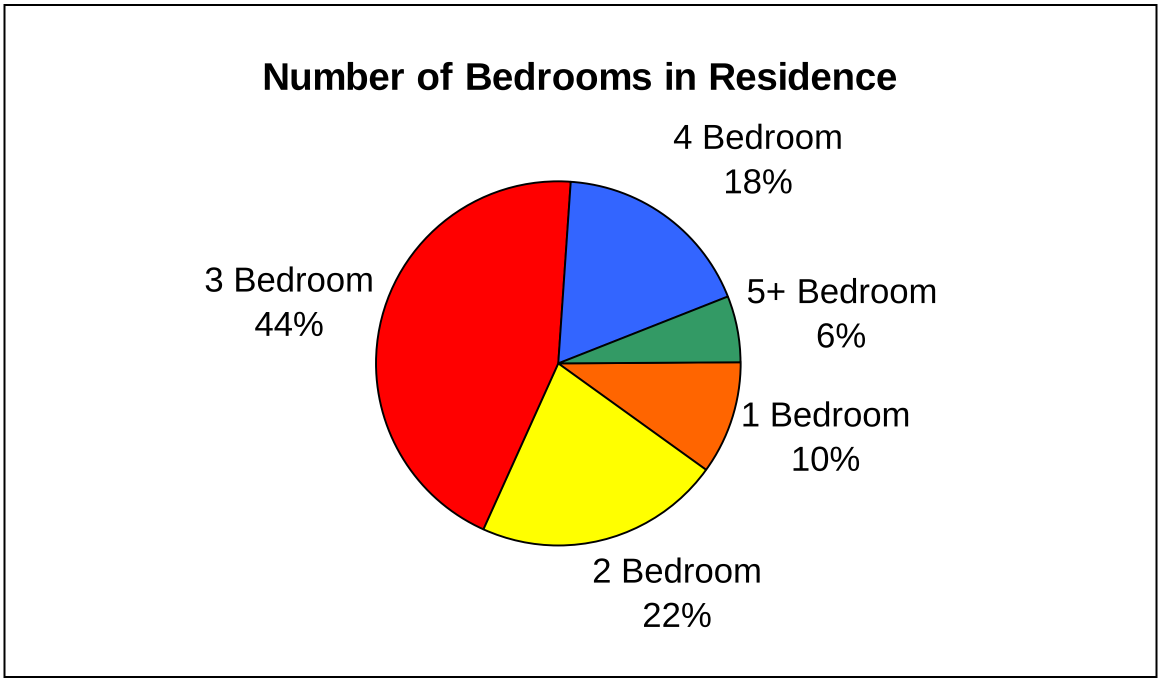
III. Findings Summary: Survey of Downtown Residents

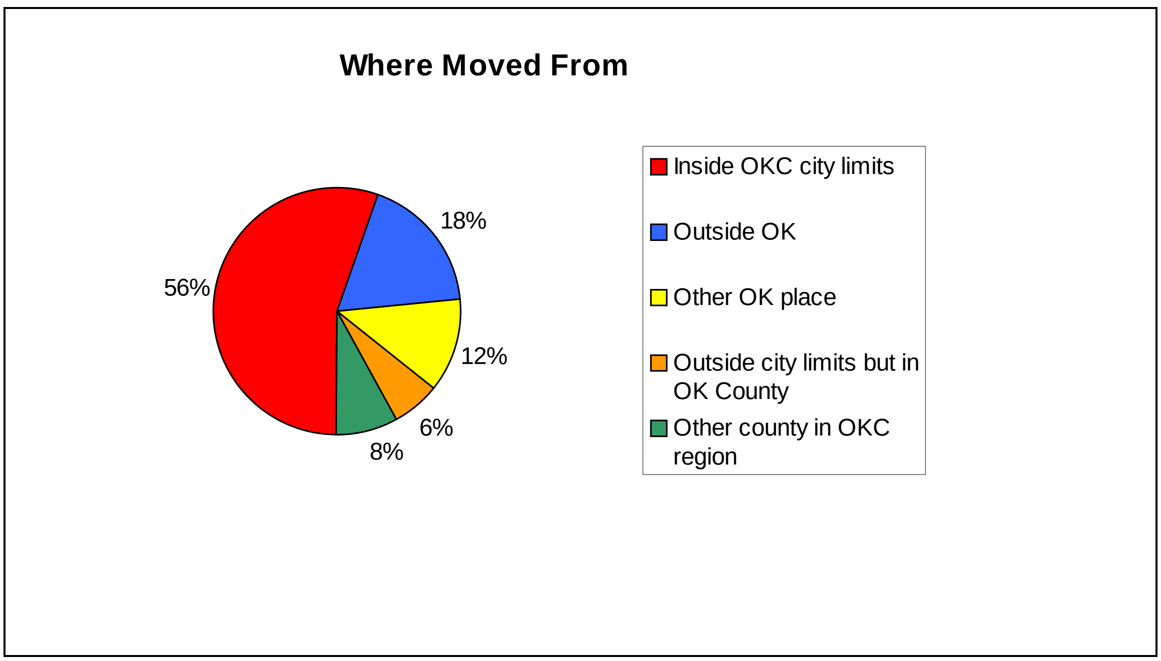
A. Living in Downtown Oklahoma City



Rent or Own	
Base:	(49)
Own	80%
Rent	20
If Rent, how much?	
Base:	(10)
$1,000 or more	0%
Less than $1,000	100



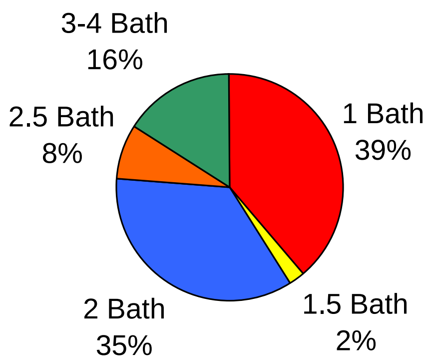




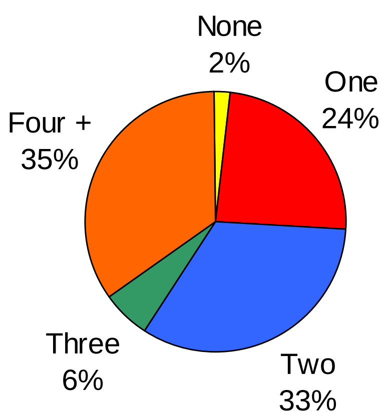
Length of Residence

	In OK City	Downtown OK City
Base	(49)	(49)
1 year or less	2%	4%
2 – 5 years	8	22
6 – 10 years	4	20
11 – 20 years	18	20
More than 20 years	67	33

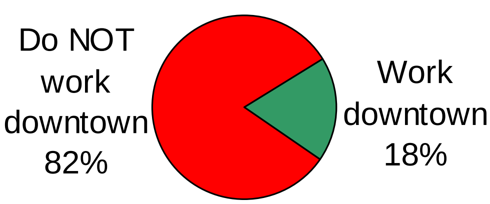
Number of Bathrooms in Residence



Number of Parking Spaces



Where Downtown Residents Work



Why Decided to Live in Downtown Oklahoma City

Base	(49)
Proximity to things going on downtown	18%
Proximity to work	16
Found a house I liked downtown/ liked downtown housing	16
Liked the area/neighborhood	14
Married into it/family house	10
Close to school	8
Not expensive/affordable	8
Historic homes	4

All other responses 1 respondent only.

B. Opinions of Living in Downtown Oklahoma City

Advantages to Living in Downtown Oklahoma City

Base:	(49)
I'm close to downtown activities and resources	43%
I'm near my job/school	29
I like the overall central location	27
I like the historic neighborhood/housing	20
I like the neighborhood/neighborhood features	10
Affords easy access to highways/freeways	10

All other responses 2 respondents or fewer.

Q.13 Since you have had experience living in downtown Oklahoma City, what do you consider to be the principal advantages to living there?

Disadvantages to Living in Downtown Oklahoma City

Base:	(49)
Crime/drugs/gangs/not safe	29%
Lack of grocery stores	16
Deteriorating homes/neighborhoods	16
Traffic	14
Noise	4
Schools	6
Don't know	8
No disadvantages	16

All other responses 2 responses or fewer.

Q.14 What do you consider to be the disadvantages, if any, to living in downtown Oklahoma City?

Suggested Improvements for Downtown Oklahoma City

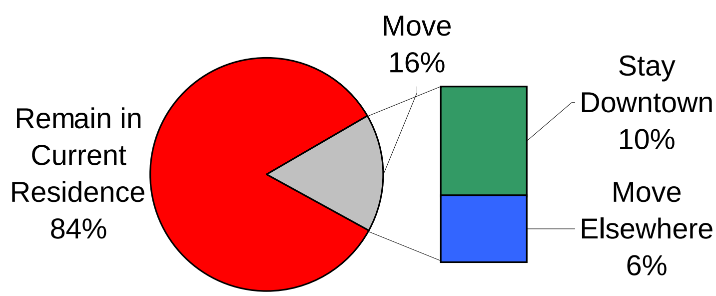
Base:	(49)
More/better selection of shopping facilities	29%
Better/cheaper parking	16
Continue enhancing cultural development/activities	10
More grocery stores	8
Law enforcement/less crime	8
Improve streets/traffic	8
Improve public transportation	6
Better/more/different housing options	6
Don't know	6
Nothing	8

All other responses 2 respondents or fewer.

Q.15 Downtown Oklahoma City has many things that make it an interesting and exciting place. Is there anything that you can think of the would make downtown Oklahoma City a more enjoyable and desirable place to live?

C. Housing Intentions During the Next One to Two Years

Housing Changes During Next 1-2 Years



Type of Downtown Residence

Base: Will stay downtown	(5)
Type downtown residence will look for…	
Single family	80%
Loft in historic building	20

D. Downtown Oklahoma City Resident Demographics

Number People Living in Household	
Base	(49)
One	29%
Two	41%
Three	16%
Four	10%
Five or more	4%

Number Children Living in Household	
Base	(49)
None	71%
One	16%
Two	12%
Three	0%
Four or more	0%

Education

Base	(49)
Less than high school	4%
High school graduate	8%
Some college, business, tech school	22%
Business or tech school graduate	4%
Four year college degree	18%
Post-graduate degree	43%

Employment Status

Base	(49)
Employed	78%
Unemployed	4%
In the armed forces	0%
Not in the labor force or retired	18%

Industry Employed In

Base: Employed	(38)
Medical services	26%
Government	26%
Business services	13%
Other	13%
Legal services	11%
Manufacturing	5%
Wholesale or retail trade	5%
Transportation	3%
Energy	0%

Age Group

Base	(49)
Under 25	2%
25 – 34	18%
35 – 44	18%
45 – 54	24%
55 – 64	22%
65 – 74	10%
75 or older	4%

Ethnic Classification

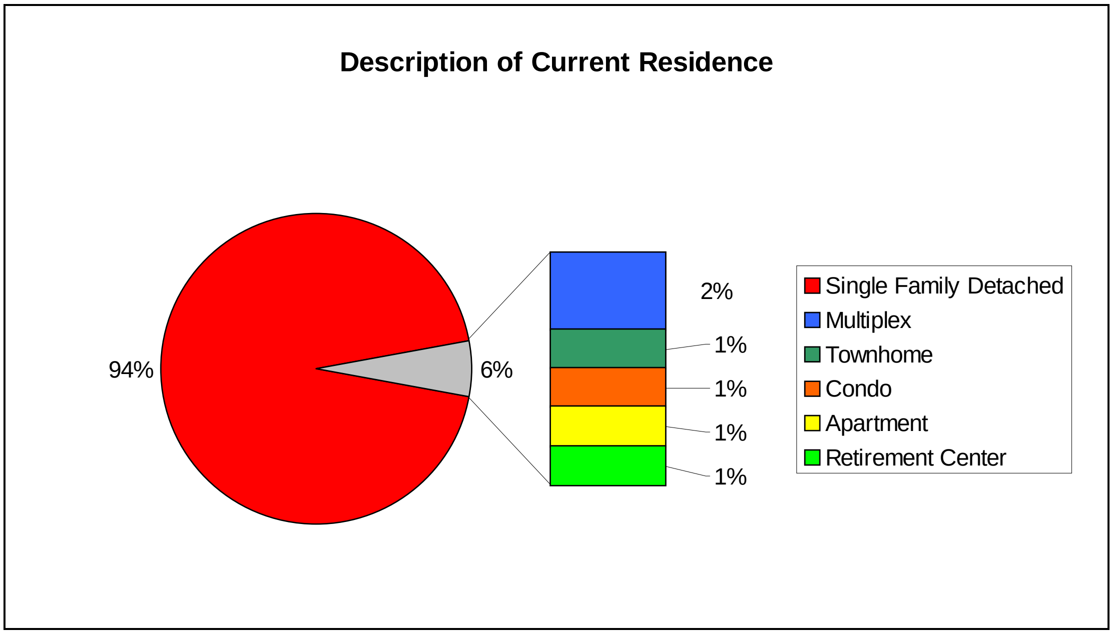
Base	(49)
White	63%
African-American	18%
Native American	8%
Refused	6%
Other	4%
Asian	0%
Hispanic or Latino	0%

E. Respondents' Home and Work Zip Codes

Home ZIP Codes	Work ZIP Codes
73102	73003
73103	73036
73104	73065
73106	73102
	73103
	73104
	73105
	73106
	73107
	73108
	73110
	73112
	73116
	73118
	73119
	73129
	73134
	73159

IV. Findings Summary: Survey of Non-Downtown Residents

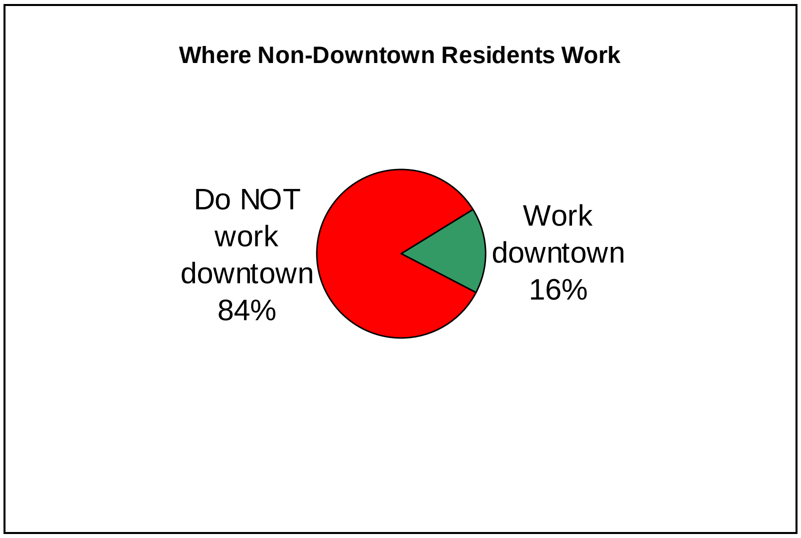
A. Living in the Oklahoma City Region in Non-Downtown Locations



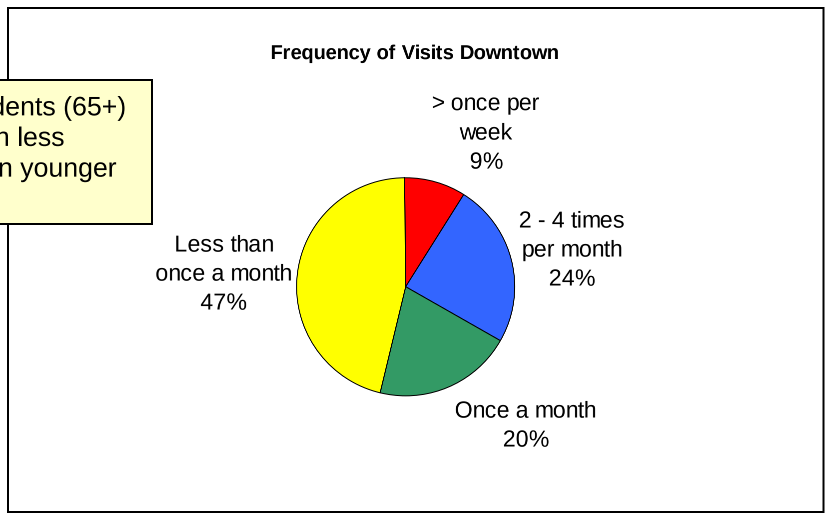
Own or Rent	
Base:	(350)
Own	91%
Rent	9
If rent, how much?	
Base:	(33)
$1,000 or more	27%
Less than $1,000	64
Refused	9

Length of Residence	
Base:	(350)
1 year or less	4%
2 – 5 years	12
6 – 10 years	7
11 – 20 years	16
More than 20 years	61

B. Current Downtown Involvement



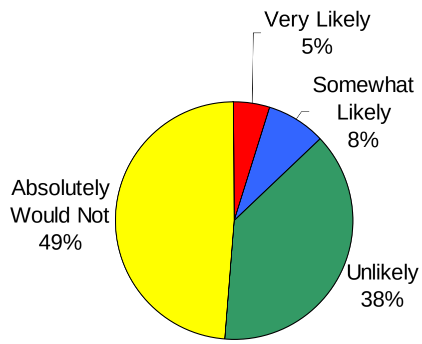
Older respondents (65+) visit downtown less frequently than younger respondents.



Downtown Activities Pursued		Especially…
Base	(350)	
Eating out	79%	higher income groups
Sporting events	61	those who work downtown
Festivals or parades	53	younger age groups
Sight-seeing	53	
Theater or movies	48	those who work downtown
Parks and recreation	35	
Shopping	28	those under 35 years old
Government services	24	
Library or learning activities	20	those who work downtown
Medical/health care	20	older age groups (55+)
Night clubs	18	younger age groups (<45)
Banking/personal finance	8	those who work downtown
None	5	those 65 years old or older

C. Living Downtown in the Future: Intentions and Considerations

Likelihood to Move Downtown



Likelihood to move downtown if "found housing that fits your needs at a price or rent you could afford…"

Younger respondent groups are far more receptive to moving downtown than older respondent groups.

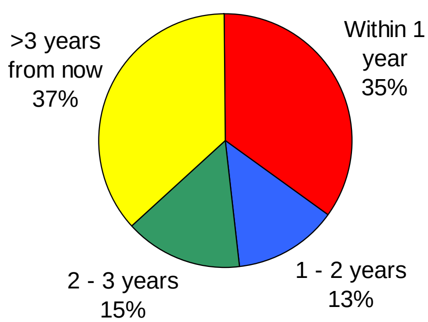
Why "Likely" To Move Downtown	
Base	(307)
Like downtown (NFI*)	3%
General convenience	2
Near culture/arts/entertainment	2
Close to school/work	1

* "No further information" available

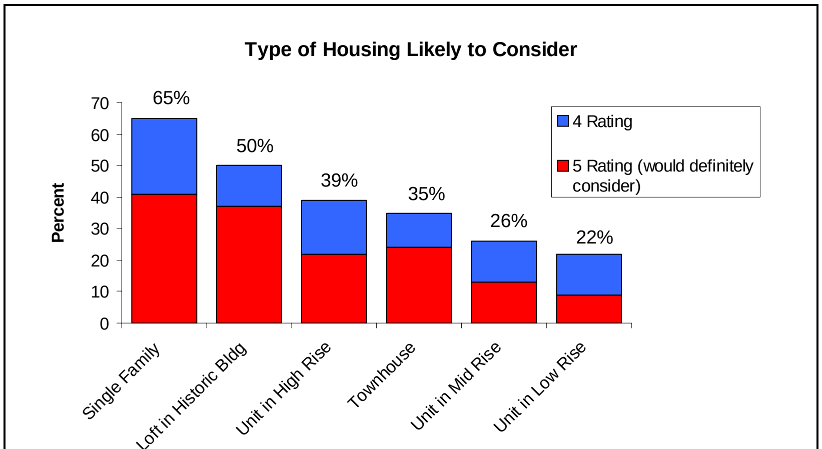
Why "Unlikely" To Move Downtown	
Base	(307)
Like living in the suburbs/country	14%
Like where I am now	10
Downtown too congested/crowded/ busy	10
Already own a house in my current location	9
Not a "city person"	9
Like having acreage/space	8
Too old/retired	5
Downtown not safe/security issues	5
Not a good environment to raise kids	5

All other "unlikely" responses 3% or less.

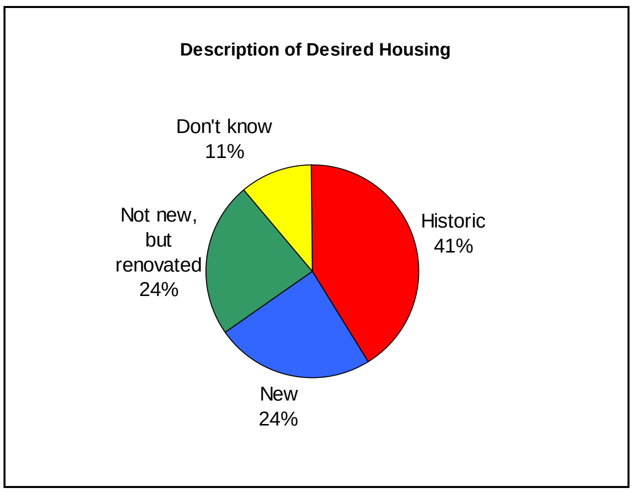
How Soon Would Consider Moving Downtown



Youngest age group (under 35) is more likely than older age groups to move within 1 year.



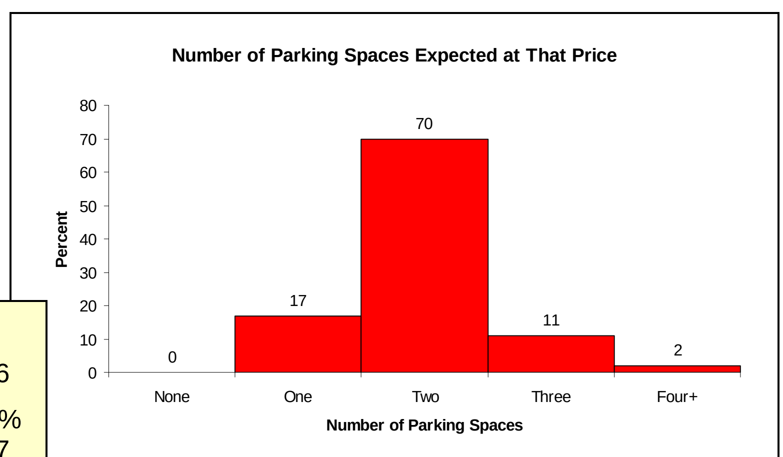
Housing rated on a five point scale: 1=absolutely not consider; 5=would definitely consider.



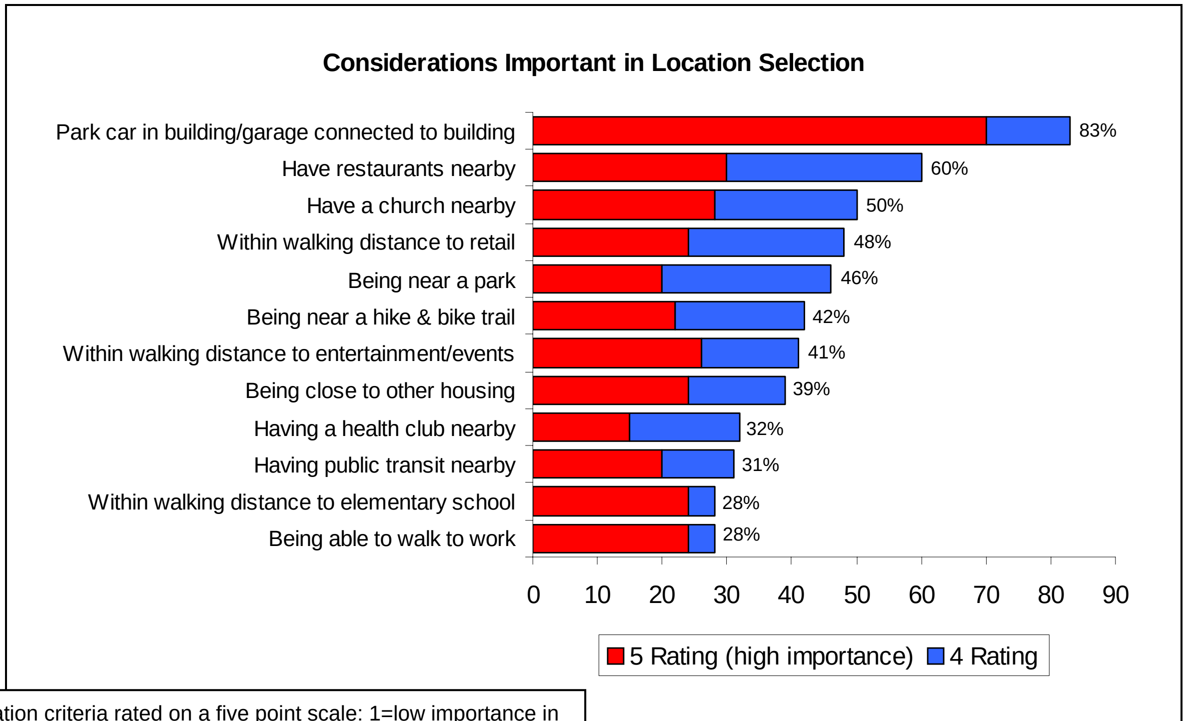
Prefer to Rent or Own	
Base	(46)
Own	89%
Rent	11
Preferred monthly payments…	
Less than $600	28%
$600 - $949	37
$950 - $1,299	28
$1,300 - $1,649	4
$1,650 - $1,999	0
$2,000 or more	2

Preferred Configuration	
Base	(46)
3 BR, 2B	39%
2 BR, 2B	26
4 BR, 2B	13
2 BR, 1B	7
2 BR, 1.5B	4
1 BR, 1B	4
3 BR, 2.5B	2
Other	4

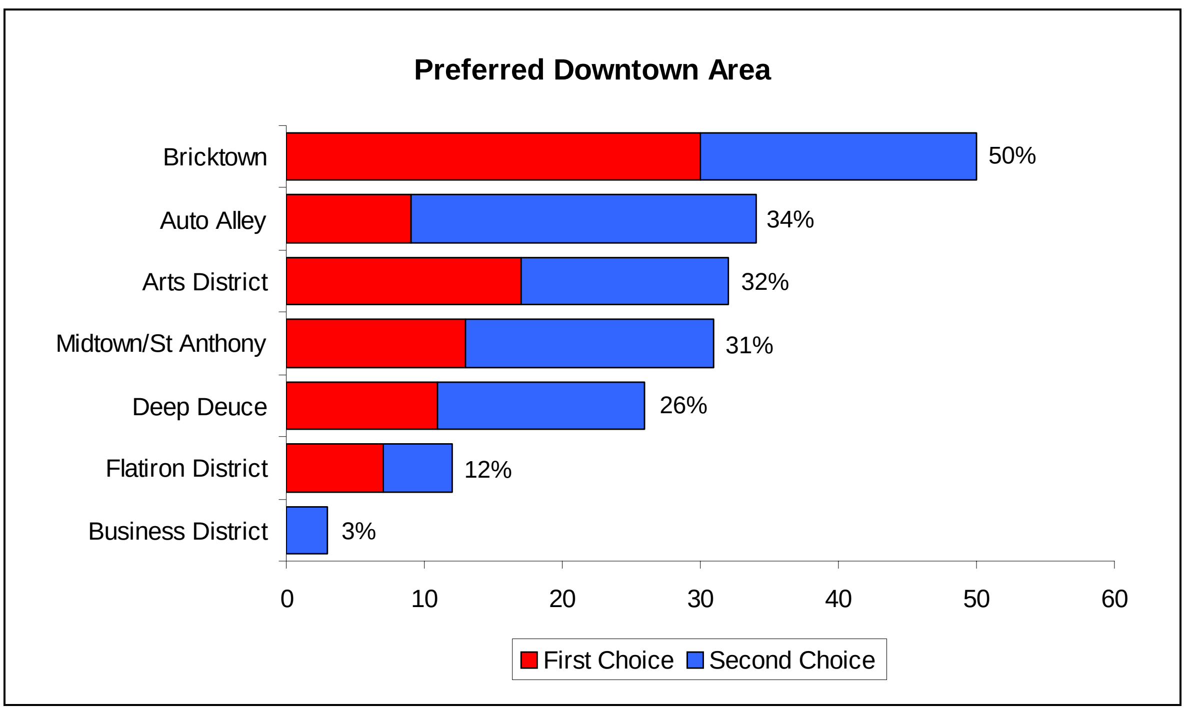
Younger age groups preferred the 3 BR, 2B configuration, while the older age groups preferred the 2 BR, 2B configuration.



Type of Parking	
Base	46
Garage	70%
Carport	17
Open lot	9
Don't know	4



Location criteria rated on a five point scale: 1=low importance in location selection decision; 5=high importance in location selection decision.



D. Non-Downtown Oklahoma City Resident Demographics

Number of People Living in Household	
Base	350
One	15%
Two	41%
Three	16%
Four	17%
Five or more	10
Refused	1

Number of Children Under 18 Year Old Living in Household	
Base	350
None	67%
One	10%
Two	15%
Three	6%
Four or more	1%
Refused	1%

Level of Education Achieved	
Base	350
Less than high school graduate	2%
High school graduate	19%
Some college, or business or tech school	31%
Business or tech school graduate	3%
Four year college degree	23%
Post-graduate degree	21%
Refused	1%

Employment Status	
Base	350
Employed	61%
Unemployed	6%
In the armed forces	0%
Not in the labor force or retired	31%
Refused	1%

Industry Employed By	
Base	215
Business services	23%
Government (including school districts)	21%
Medical services	18%
Wholesale or retail trade	10%
Other	9%
Energy	6%
Manufacturing	6%
Transportation	3%
Legal services	3%
Refused	1%

Age Group	
Base	350
Under 25	5%
25 – 34	14%
35 – 44	18%
45 – 54	22%
55 – 64	19%
65 – 74	11%
75 or older	7%
Refused	4%

Ethnic Classification	
Base	350
White	89%
African-American	4%
Native American	4%
Hispanic or Latino	1%
Asian	1%
Other	0%
Refused	1%

Annual Household Income Group	
Base	350
Less than $35,000	15%
$35,000 - $49,999	19%
$50,000 - $74,999	21%
$75,000 - $99,999	13%
$100,000 - $150,000	7%
More than $150,000	7%
Refused	17%

E. Respondents' Home and Work Zip Codes

Home ZIP Codes

73003	25
73170	20
73034	19
73099	17
73072	16
73159	15
73120	14
73112	13
73013	12
73110	11
73008	9
73020	9
73107	9
73160	9
73162	9
73116	8
73071	7
73118	7
73132	7
73122	6
73139	6
73064	5
73069	5
73142	5
73036	4
73044	4
73078	4
73026	3
73114	3
73121	3
73127	3
73130	3
73135	3
73150	3
73010	2
73049	2
73054	2
73068	2
73115	2
73131	2
73007	1
73014	1
73027	1
73028	1

73045	1
73065	1
73083	1
73084	1
73093	1
73103	1
73105	1
73109	1
73111	1
73119	1
73129	1
73134	1
73141	1
73151	1
73165	1
73166	1
73171	1
73179	1
73261	1
73405	1

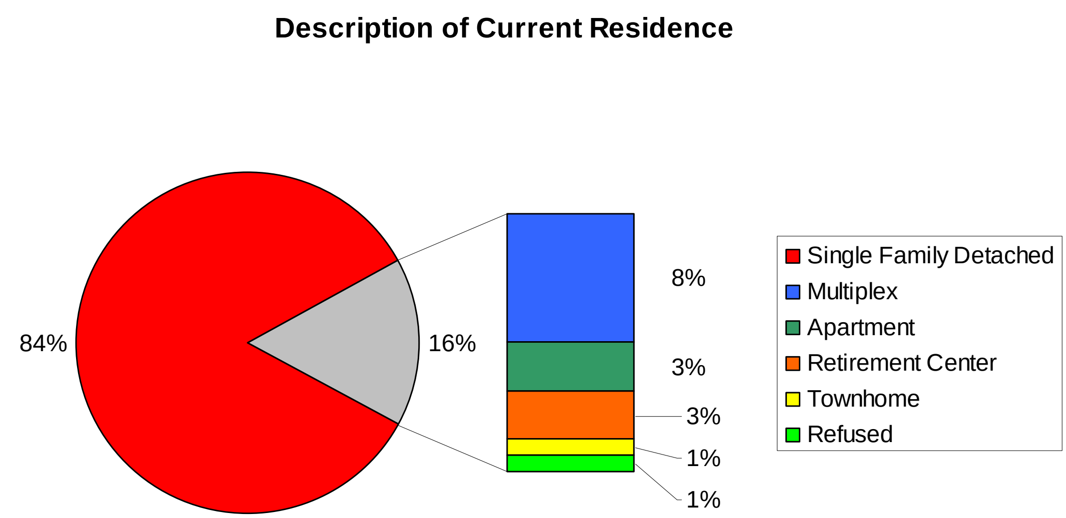
Work ZIP Codes

73112	11
73034	9
73102	9
73003	7
73013	6
73106	6
73110	6
73116	6
73099	5
73104	5
73107	5
73132	5
73069	4
73072	4
73114	4
73120	4
73127	4
73129	4
73008	3
73044	3
73071	3
73103	3
73105	3
73111	3
73139	3
73145	3
73159	3

73170	3
73026	2
73036	2
73109	2
73122	2
73125	2
73130	2
73134	2
73160	2
73169	2
73031	1
73043	1
73049	1
73050	1
73070	1
73080	1
73093	1
73101	1
73108	1
73115	1
73117	1
73118	1
73126	1
73135	1
73142	1
73144	1
73149	1
73162	1
73168	1
73405	1

V. *Survey of Non-Downtown Residents—Relevant Charts of Weighted Data[1], Renters Compared to Owners*

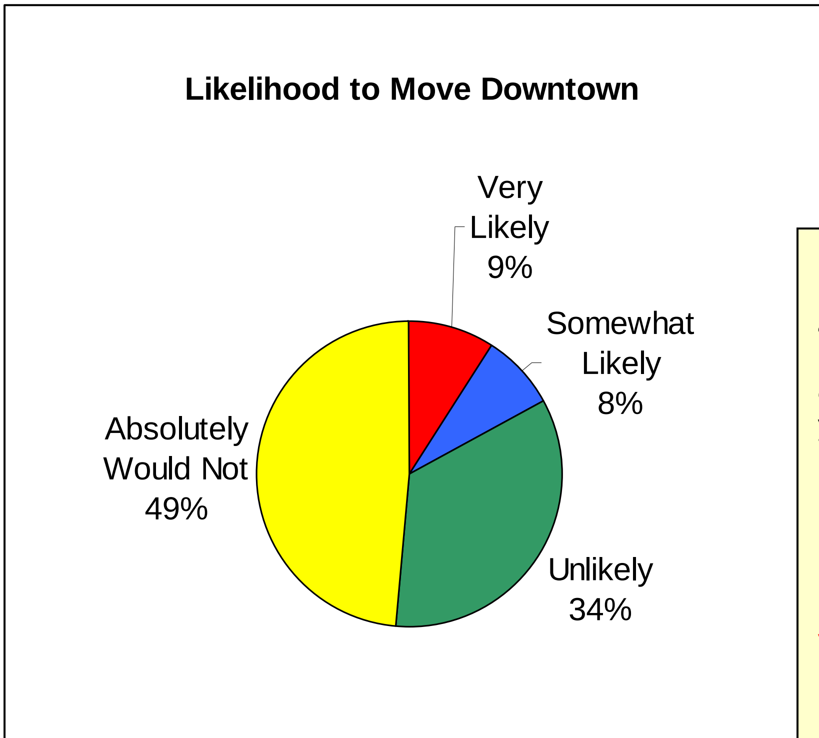
A. Living in Oklahoma City in Non-Downtown Locations



Own or Rent	
Base:	354
Own	63%
Rent	37
If rent, how much?	
Base	132
$1,000 or more	27%
Less than $1,000	64
Refused	9

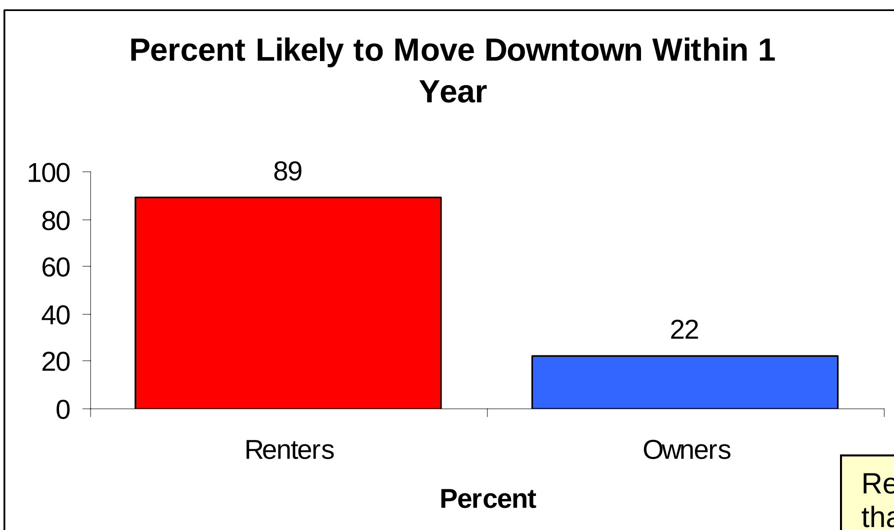
[1] Survey data weighted to reflect a 63%/37% owner occupied/renter occupied ratio, the actual ratio as reported by the Claritas 2004 estimate.

B. Living Downtown in the Future: Intentions and Considerations

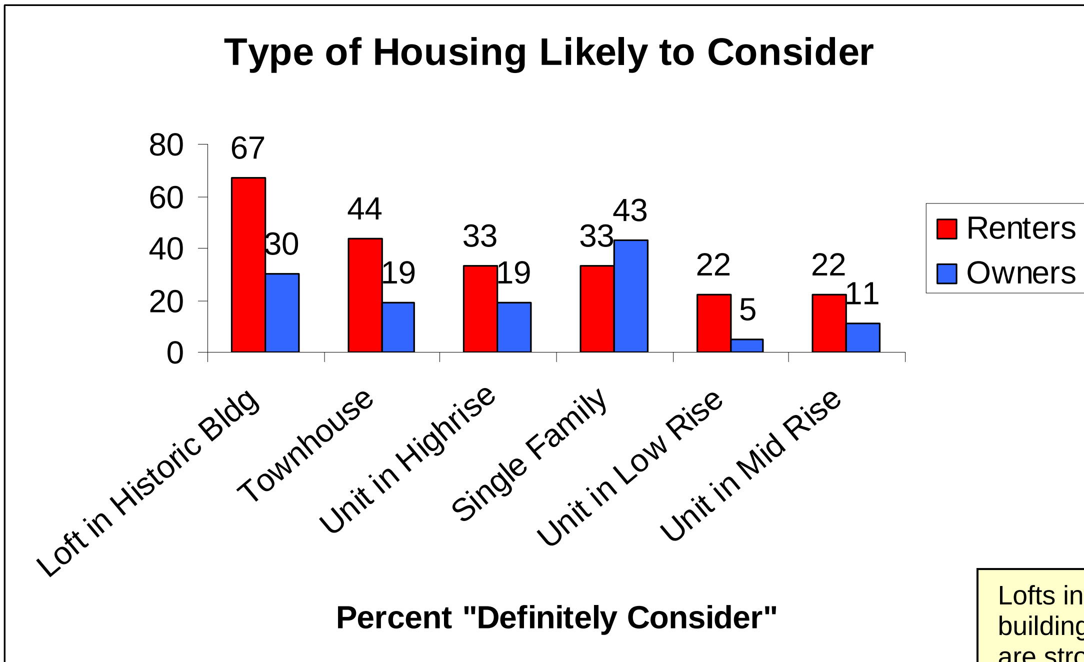


Those who currently rent their residence are four and half times more likely to move downtown than owners if "housing that fits your needs were available downtown at a price or rent that you could afford."

	Own	Rent
Base	222	132
Very likely	**4%**	**18%**
Somewhat likely	8	9
Unlikely	39	27
Absolutely would not	50	45



Renters are far more likely than owners to move downtown within one year.



Lofts in historic buildings downtown are strongly appealing to those who currently rent their residence.

VI. Oklahoma City Downtown Housing Survey Instruments

Downtown Respondents

Hello, I'm __________________ with CRI Research. We're conducting a survey to find out people's opinions of facilities in Downtown Oklahoma City. We're not selling anything and your answers will remain completely confidential.

Are you an adult head of household 18 years of age or older?

Yes.................................. 1
.................................**(CONTINUE)**
No 2

(IF NO, ASK FOR A HEAD OF HOUSEHOLD OR ARRANGE TO CALL BACK IF POSSIBLE)

1. Do you live in or near Downtown Oklahoma City?

Yes... 1
No 2
................................**(TERMINATE)**

2. Do you or another head of household work downtown?

Yes... 1
No 2

3a. How long have you lived in the Oklahoma City area?

3b. … and how long have you lived in or near downtown?

Length of Time	**a.** **In Oklahoma City**	**b.** **Downtown**
1 year or less	1	1
2 – 5 years	2	2
6 – 10 years	3	3
11 – 20 years	4	4
More than 20 years	5	5

4. Where did you live before you moved to Downtown Oklahoma City? Was it … **(READ)**

Somewhere else inside the city limits of Oklahoma City? 1
Outside the city limits but still in Oklahoma County?... 2
In another county in the metropolitan region of Oklahoma City (Canadian, Cleveland, Grady, Sinclair, Logan, McClain or Pottawatomic County)?... 3
Some other place in Oklahoma?................................ 4
Or outside the state?.. 5
Refused................ **(DO NOT READ)** 8

5a. Had you ever lived in the downtown area of any other city?

Yes.. 1
No .... 2 **(SKIP TO Q6)**

5b. **(IF YES)** Where? **(WRITE IN UP TO THREE)**

____

6. What was the single most important reason you decided to live in or near downtown Oklahoma City? **(WRITE IN ONE REASON ONLY)**

____

7. How would you describe your current residence? Is it a … **(READ)**

Single family detached home?.................................. 1
Duplex, triplex or quadriplex? 2
Townhome? 3
Loft?.. 4
Unit in a low-rise building with 1-3 floors?.................. 5
Unit in a mid-rise building with 4-8 floors? 6
Unit in a high-rise building with 9 or more floors? 7
Other. What? ____________________.................... 8

8. How many bedrooms and bathrooms do you have in your residence? **(DO NOT READ)**

1 BR, 1 B.. 1
2 BR, 1 B.. 2
2 BR, 1½ B.. 3
2 BR, 2 B.. 4
3 BR, 2 B.. 5
3 BR, 2½ B.. 6
3 BR, 3 B.. 7
Other. What? ____________________...................... 8
Refused... 88

9. … and how many parking spaces do you have? **(DO NOT READ)**

None 1
One 2
Two 3
Three.. 4
Four or more 5
Refused.. 8

10. Would you describe it as a new, recently built or historic structure?

New (less than two years old).................................... 1
Recently built 2
Historic.. 3
Don't know 9

11. Do you own or rent your residence?

Own... 1 **(SKIP TO Q13)**
Rent 2
Refused................. **(DO NOT READ)** 8

12. **(IF RENT)** Does your residence rent for $1,000 or more, or less than $1,000 per month?

$1,000 or more.. 1
Less than $1,000 2
Refused................. **(DO NOT READ)** 8

13. Since you have had experience living in Downtown Oklahoma City, what do you consider to be the principal advantages to living there? **(RECORD UP TO THREE)**

____
____
____

14. And what do you consider to be the <u>disadvantages</u>, if any, to living in Downtown Oklahoma City? **(RECORD UP TO THREE)**

____
____
____

15. Downtown Oklahoma City has many things that make it an interesting and exciting place. Is there anything that you can think of that would make Downtown Oklahoma City a more enjoyable and desirable place to <u>live</u>? If so, what? **(RECORD UP TO THREE RESPONSES)**

____
____
____

Thank you. Now just a few background questions for classification purposes. Again, your responses will remain strictly confidential and will be grouped with those of our other respondents.

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

One 1
Two 2
Three.. 3
Four.. 4
Five or more 5
Refused................. **(DO NOT READ)** 8

17. How many children under 18 years of age live in your household?

None 1
One 2
Two 3
Three.. 4
Four or more 5
Refused................. **(DO NOT READ)** 8

18. What was the last year of formal education you completed? Was it … **(READ)**

Less than high school graduate?............................... 1
High school graduate?.. 2
Some college, or business or tech school? 3
Business or tech school graduate?............................ 4
Four year college degree?... 5
Post-graduate degree? 6
Refused................. **(DO NOT READ)** 8

19. What is your current employment status? Are you … **(READ)**

Employed? 1
Unemployed? .... 2 **(SKIP TO Q18)**
In the armed forces? .... 3 **(SKIP TO Q18)**
Not in the labor force or retired? .... 4 **(SKIP TO Q18)**
Refused................. **(DO NOT READ)** .... 8 **(SKIP TO Q18)**

20. **(IF EMPLOYED IN Q16)** What industry are you employed in? Is it … **(READ)**

Energy? 1
Manufacturing? 2
Medical services? 3
Legal services? 4
Government (including school districts)? 5
Wholesale or retail trade? 6
Transportation? 7
Business services? 8
Or some other industry? What? __________ 9
Refused................. **(DO NOT READ)** 88

21. What is your age? Is it … **(READ)**

Under 25? 1
25 to 34? 2
35 4o 44? 3
45 to 54? 4
55 to 64? 5
65 to 74? 6
75 or older? 7
Refused................. **(DO NOT READ)** 8

22a. What is your home zip code? 7 3 ____ ____ ____

Refused................. **(DO NOT READ)** 8
Don't know .... **(DO NOT READ)** 9

22b. What is your work zip code? 7 3 ____ ____ ____

Refused................. **(DO NOT READ)** 8
Don't know .... **(DO NOT READ)** 9

23. Which one of the following ethnic classifications best describes you? Is it … **(READ)**

White 1
Hispanic or Latino 2
African-American 3
Asian 4
Native American... 5
Other **(SPECIFY)** ___________________ 6
Refused................. **(DO NOT READ)** 8

24. Finally, is your annual household income, the combined income of yourself and other wage earners living in your household … **(READ)**

Less than $35,000? 1
$35,000 – $50,000? 2
$50,000 – $75,000? 3
$75,000 – $100,000? 4
$100,000 – $150,000? 5
Over $150,000? 6
Refused................. **(DO NOT READ)** 8

25. Gender **(RECORD BY OBSERVATION)**

Male 1
Female 2

That's all the questions I have. I appreciate your cooperation. Have a nice evening.

Interviewer: ____

Non-Downtown Respondents

Hello, I'm _________________ with CRI Research. We're conducting a survey to find out people's opinions of facilities and future development possibilities in Downtown Oklahoma City. We're not selling anything. It's only a survey and your answers will remain completely confidential.

Are you an adult head of household 18 years of age or older?

Yes.................................. 1
.................................**(CONTINUE)**
No 2

(IF NO, ASK FOR A HEAD OF HOUSEHOLD OR ARRANGE TO CALL BACK IF POSSIBLE)

Thank you. First, when we say "Downtown," we mean the area in the center of Oklahoma City bordered by 23rd Street on the north, I-235 – the Centennial Expressway – on the east, I-40 on the south, and Classen Blvd. on the west. Are you generally familiar with this area?

Yes.................................. 1
.................................**(CONTINUE)**
No 2
................................**(TERMINATE)**

1. Do you or another head of household work downtown?

Yes.. 1
No 2

2a. Is your primary residence a …

Single family detached home?.................................. 1
Duplex, triplex or quadriplex? 2
Townhome? 3
Condominium?.. 4
Apartment? 5
Loft?... 6
Or something else? What? ______________ 7

2b. Do you own or rent your residence?

Own.. 1 **(SKIP TO Q3)**
Rent 2
Refused................. **(DO NOT READ)** 8

2c. **(IF RENT)** Does your residence rent for $1,000 or more, or less than $1,000 per month?

$1,000 or more.. 1
Less than $1,000 2
Refused................. **(DO NOT READ)** 3

3. How long have you lived in the Oklahoma City area?

1 year or less	1
2 – 5 years	2
6 – 10 years	3
11 – 20 years	4
More than 20 years	5

4a. On average, how often do you visit downtown for reasons <u>other</u> than work related activities? Would you say … **(READ)**

More than once a week?	1
2 – 4 times a month?	2
Once a month?	3
Or less than once a month?	4

4b. Other than work-related visits, which of the following activities do you pursue in Downtown Oklahoma City? What about … **(CIRCLE ALL THAT ARE MENTIONED. ROTATE LIST)**

Sporting events?	1
Theater or movies?	2
Festivals or parades?	3
Parks and recreation?	4
Eating out?	5
Night clubs?	6
Shopping?	7
Banking or personal finance?	8
Library or learning activities?	9
Medical/health care?	10
City, county or federal government services?	11
Site-seeing?	12
None **(DO NOT READ)**	13

5a. Have you ever lived in the downtown area of any city?

Yes	1	
No	2	**(SKIP TO Q6)**

5b. **(IF YES)** Where? **(RECORD UP TO THREE)**

____

6a. If housing that fit your needs was available in Downtown Oklahoma City at a price or rent you could afford, how likely would you be to move downtown? Would you say … **(READ)**

Very likely?	1
Somewhat likely?	2
Unlikely?	3
Or absolutely would not?	4

6b. What is the single most important reason you say that? **(RECORD ONLY ONE RESPONSE)**

____

(IF 3 OR 4 IN Q6a, SKIP TO Q14)

6c. **(IF 1 OR 2 IN Q6a)** How soon would you consider moving downtown if the right housing product was available at the right price? **(READ)**

Within 1 year? 1
In 1 to 2 years? 2
In 2 to 3 years? 3
Or more than 3 years from now? 4

7. I'm going to read a list of various types of housing that could possibly be offered in Downtown Oklahoma City.

a) On a scale of 1 to 5, with "1" meaning you would absolutely not consider it and "5" meaning you would definitely consider it, how likely would you be to consider …

b) Which one of the possibilities I mentioned would be your first choice?

	a						b
	Level of Appeal					Don't know	1st Choice
A townhome?	1	2	3	4	5	9	4
A loft in an historic building?*	1	2	3	4	5	9	5
A unit in a low-rise building with 1 to 3 floors?	1	2	3	4	5	9	1
A unit in a mid-rise building with 4 to 8 floors?	1	2	3	4	5	9	2
A unit in a high-rise building with 9 or more floors?	1	2	3	4	5	9	3
Don't know **(DO NOT READ)**						9	9

(*IF RESPONDENT ASKS FOR A DEFINITION OF "LOFT", SAY:
A loft is a residence with an open floor design and high ceilings, typically located in a former office building, manufacturing facility or warehouse.)

8. Would you prefer to live in a new or historic structure?

New.. 1
Historic.. 2
Don't know. No preference. 9

9. Initially, would you prefer to own or rent your residence in Downtown?

Own.. 1
Rent 2

10. About how much would you be willing to pay in the form of a mortgage payment or rent per month to live downtown? Would you say … **(READ)**

Less than $600 1
$600 - $949.. 2
$950 - $1,299... 3
$1,300 - $1,649.. 4
$1,650 - $1,999.. 5
$2,000 or more... 6
Don't know. **(DO NOT READ)**.................................. 9

11a. How many bedrooms and bathrooms would you want and expect to get at that cost? **(DO NOT READ)**

1 BR, 1 B.. 1
2 BR, 1 B.. 2
2 BR, 1½ B.. 3
2 BR, 2 B.. 4
3 BR, 2 B.. 5
3 BR, 2½ B.. 6
3 BR, 3 B.. 7
Other. What? ____________________..................... 8
Don't know. 9

11b. … and how many parking spaces would you want and expect to get at that cost? **(DO NOT READ)**

None 1
One 2
Two 3
Three... 4
Four or more 5
Don't know 9

12. Now I'm going to read a list of factors that one might consider in selecting one location over another in Downtown Oklahoma City. On a scale of 1 to 5, with "1" meaning <u>not at all important</u> and "5" meaning <u>absolutely essential</u>, please tell me know important each factor is to you. **(READ AND ROTATE)**

	Factor	**Importance** **Low**				**High**	**Don't Know**
a.	Being able to walk to work.	1	2	3	4	5	9
b.	Being able to park your car within the building or in a garage connected to the building.	1	2	3	4	5	9
c.	Being within walking distance of an elementary school.	1	2	3	4	5	9
d.	Being near a park.	1	2	3	4	5	9
e.	Being near a hike and bike trail.	1	2	3	4	5	9
f.	Being close to other housing.	1	2	3	4	5	9
g.	Being within walking distance of retail facilities.	1	2	3	4	5	9
h.	Having trees along the street where you live.	1	2	3	4	5	9
i.	Having restaurants nearby.	1	2	3	4	5	9
j.	Having a health club nearby.	1	2	3	4	5	9
k.	Having public transit nearby.	1	2	3	4	5	9

13. If you had your choice of several different areas of downtown in which to live, which one of the following would be:

a) … your first choice? **(READ AND ROTATE)**

b) … and which one would be your second choice?

	Area	**a. First choice**	**b. Second choice**
1)	Arts District	1	1
2)	Automobile Alley	2	2
3)	Business District	3	3
4)	Bricktown	4	4
5)	Deep Deuce	5	5
6)	Flatiron District	6	6
7)	Midtown/St. Anthony area	7	7
8)	Don't know. **(DO NOT READ)**	9	9

Thank you. Now just a few background questions for classification purposes. Again, your responses will remain strictly confidential and will be grouped with those of our other respondents.

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

One 1
Two 2
Three.. 3
Four.. 4
Five or more 5
Refused................. **(DO NOT READ)** 8

15. How many children under 18 years of age live in your household?

None 1
One 2
Two 3
Three.. 4
Four or more 5
Refused................. **(DO NOT READ)** 8

16. What was the last year of formal education you completed? Was it … **(READ)**

Less than high school graduate?............................... 1
High school graduate?... 2
Some college, or business or tech school? 3
Business or tech school graduate?............................ 4
Four year college degree?... 5
Post-graduate degree? 6
Refused................. **(DO NOT READ)** 8

17. What is your current employment status? Are you … **(READ)**

Employed?.. 1
Unemployed?.. 2 **(SKIP TO Q19)**
In the armed forces?.. 3 **(SKIP TO Q19)**
Not in the labor force or retired?? .... 4 **(SKIP TO Q19)**
Refused................. **(DO NOT READ)** .... 8 **(SKIP TO Q19)**

18. **(IF EMPLOYED IN Q17)** What industry are you employed in? Is it … **(READ)**

Energy? 1
Manufacturing? 2
Medical services? 3
Legal services? 4
Government (including school districts)? 5
Wholesale or retail trade? 6
Transportation? 7
Business services? 8
Or some other industry? What? __________ 9
Refused................. **(DO NOT READ)** 88

19. What is your age? Is it … **(READ)**

Under 25? 1
25 to 34? 2
35 4o 44? 3
45 to 54? 4
55 to 64? 5
65 to 74? 6
75 or older? 7
Refused................. **(DO NOT READ)** 8

20a. What is your home zip code? 7 3 ___ ___ ___

Refused................. **(DO NOT READ)** 8
Don't know .... **(DO NOT READ)** 9

20b. What is your work zip code? 7 3 ___ ___ ___

Refused................. **(DO NOT READ)** 8
Don't know .... **(DO NOT READ)** 9

21. Which one of the following ethnic classifications best describes you? Is it … **(READ)**

White 1
Hispanic or Latino 2
African-American 3
Asian 4
Native American 5
Other **(SPECIFY)** ___________________ 6
Refused................. **(DO NOT READ)** 8

22. Finally, is your annual household income, the combined income of yourself and other people living in your household … **(READ)**

Less than $35,000? 1
$35,000 – $50,000? 2
$50,000 – $75,000? 3
$75,000 – $100,000? 4
$100,000 – $150,000? 5
Over $150,000? 6
Refused................. **(DO NOT READ)** 8

23. Gender **(RECORD BY OBSERVATION)**

Male 1
Female 2

That's all the questions I have. I appreciate your cooperation. Have a nice evening.

Interviewer: ______________________________________

VII. Downtown Residents Results Tables

Survey of Downtown Oklahoma City Residents

Q.1 Do you live in or near downtown Oklahoma City?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Yes	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
No	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%

June 2005

Q.2 Do you or another head of household work downtown?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Yes	9 17.6%	9 100.0%	0 0.0%	5 25.0%	3 13.0%	1 12.5%	2 8.7%	7 26.9%	4 16.0%	5 19.2%
No	42 82.4%	0 0.0%	42 100.0%	15 75.0%	20 87.0%	7 87.5%	21 91.3%	19 73.1%	21 84.0%	21 80.8%

June 2005

Q.3a How long have you lived in the Oklahoma City area?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
1 year or less	1 2.0%	0 0.0%	1 2.4%	1 5.0%	0 0.0%	0 0.0%	0 0.0%	1 3.8%	1 4.0%	0 0.0%
2 - 5 years	4 7.8%	0 0.0%	4 9.5%	1 5.0%	3 13.0%	0 0.0%	3 13.0%	1 3.8%	2 8.0%	2 7.7%
6 - 10 years	3 5.9%	1 11.1%	2 4.8%	3 15.0%	0 0.0%	0 0.0%	2 8.7%	1 3.8%	2 8.0%	1 3.8%
11 - 20 years	9 17.6%	3 33.3%	6 14.3%	8 40.0%	1 4.3%	0 0.0%	2 8.7%	6 23.1%	5 20.0%	4 15.4%
More than 20 years	34 66.7%	5 55.6%	29 69.0%	7 35.0%	19 82.6%	8 100.0%	16 69.6%	17 65.4%	15 60.0%	19 73.1%

Q.3b How long have you lived in or near downtown?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
1 year or less	2 3.9%	0 0.0%	2 4.8%	1 5.0%	1 4.3%	0 0.0%	0 0.0%	2 7.7%	1 4.0%	1 3.8%
2 - 5 years	11 21.6%	2 22.2%	9 21.4%	4 20.0%	6 26.1%	1 12.5%	6 26.1%	5 19.2%	6 24.0%	5 19.2%
6 - 10 years	11 21.6%	1 11.1%	10 23.8%	9 45.0%	2 8.7%	0 0.0%	7 30.4%	4 15.4%	7 28.0%	4 15.4%
11 - 20 years	11 21.6%	4 44.4%	7 16.7%	5 25.0%	3 13.0%	3 37.5%	5 21.7%	5 19.2%	5 20.0%	6 23.1%
More than 20 years	16 31.4%	2 22.2%	14 33.3%	1 5.0%	11 47.8%	4 50.0%	5 21.7%	10 38.5%	6 24.0%	10 38.5%

June 2005

Q.4 Where did you live before you moved to downtown Oklahoma City?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Somewhere else inside the city limits of Oklahoma City	27 52.9%	4 44.4%	23 54.8%	8 40.0%	14 60.9%	5 62.5%	13 56.5%	13 50.0%	12 48.0%	15 57.7%
Outside the city limits but still in Oklahoma County	4 7.8%	1 11.1%	3 7.1%	2 10.0%	0 0.0%	2 25.0%	1 4.3%	2 7.7%	1 4.0%	3 11.5%
In another county in the metropolitan region of Oklahoma City	5 9.8%	1 11.1%	4 9.5%	5 25.0%	0 0.0%	0 0.0%	3 13.0%	2 7.7%	3 12.0%	2 7.7%
Some other place in Oklahoma	6 11.8%	1 11.1%	5 11.9%	2 10.0%	4 17.4%	0 0.0%	4 17.4%	2 7.7%	4 16.0%	2 7.7%
Outside the state	9 17.6%	2 22.2%	7 16.7%	3 15.0%	5 21.7%	1 12.5%	2 8.7%	7 26.9%	5 20.0%	4 15.4%

Q.5a Had you ever lived in the downtown area of any other city?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Yes	9 17.6%	1 11.1%	8 19.0%	5 25.0%	3 13.0%	1 12.5%	5 21.7%	4 15.4%	5 20.0%	4 15.4%
No	42 82.4%	8 88.9%	34 81.0%	15 75.0%	20 87.0%	7 87.5%	18 78.3%	22 84.6%	20 80.0%	22 84.6%

June 2005

Q.5b (IF YES:) Where?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	9 100.0%	1 100.0%	8 100.0%	5 100.0%	3 100.0%	1 100.0%	5 100.0%	4 100.0%	5 100.0%	4 100.0%
Chicago	2 22.2%	1 100.0%	1 12.5%	1 20.0%	1 33.3%	0 0.0%	0 0.0%	2 50.0%	1 20.0%	1 25.0%
Kansas City	1 11.1%	0 0.0%	1 12.5%	1 20.0%	0 0.0%	0 0.0%	1 20.0%	0 0.0%	1 20.0%	0 0.0%
Dallas	1 11.1%	0 0.0%	1 12.5%	1 20.0%	0 0.0%	0 0.0%	1 20.0%	0 0.0%	0 0.0%	1 25.0%
Ann Arbor	1 11.1%	0 0.0%	1 12.5%	0 0.0%	1 33.3%	0 0.0%	0 0.0%	1 25.0%	1 20.0%	0 0.0%
Arkansas	1 11.1%	0 0.0%	1 12.5%	0 0.0%	0 0.0%	1 100.0%	1 20.0%	0 0.0%	0 0.0%	1 25.0%
Tucson	1 11.1%	0 0.0%	1 12.5%	1 20.0%	0 0.0%	0 0.0%	1 20.0%	0 0.0%	1 20.0%	0 0.0%
Portland, OR	1 11.1%	0 0.0%	1 12.5%	1 20.0%	0 0.0%	0 0.0%	1 20.0%	0 0.0%	1 20.0%	0 0.0%
New York	1 11.1%	0 0.0%	1 12.5%	0 0.0%	1 33.3%	0 0.0%	0 0.0%	1 25.0%	0 0.0%	1 25.0%

Q.6 What was the single most important reason you decided to live in or near downtown Oklahoma City?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Proximity to job	9 17.6%	0 0.0%	9 21.4%	2 10.0%	6 26.1%	1 12.5%	7 30.4%	2 7.7%	4 16.0%	5 19.2%
Found house I liked/liked downtown housing	8 15.7%	3 33.3%	5 11.9%	5 25.0%	2 8.7%	1 12.5%	5 21.7%	3 11.5%	4 16.0%	4 15.4%
Convenience/close to things going on downtown	9 17.6%	1 11.1%	8 19.0%	3 15.0%	5 21.7%	1 12.5%	2 8.7%	7 26.9%	5 20.0%	4 15.4%
Married into it/family house	6 11.8%	1 11.1%	5 11.9%	3 15.0%	2 8.7%	1 12.5%	4 17.4%	2 7.7%	3 12.0%	3 11.5%
Inexpensive/less expensive	4 7.8%	0 0.0%	4 9.5%	2 10.0%	1 4.3%	1 12.5%	2 8.7%	1 3.8%	3 12.0%	1 3.8%
Liked the area/neighborhood	7 13.7%	3 33.3%	4 9.5%	1 5.0%	5 21.7%	1 12.5%	1 4.3%	5 19.2%	2 8.0%	5 19.2%
Close to school	4 7.8%	0 0.0%	4 9.5%	3 15.0%	0 0.0%	1 12.5%	1 4.3%	3 11.5%	2 8.0%	2 7.7%

Historic homes	2	0	2	0	2	0	0	2	0	2
	3.9%	0.0%	4.8%	0.0%	8.7%	0.0%	0.0%	7.7%	0.0%	7.7%
Other	2	1	1	1	0	1	1	1	2	0
	3.9%	11.1%	2.4%	5.0%	0.0%	12.5%	4.3%	3.8%	8.0%	0.0%

Q.7 How would you describe your current residence?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Single family detached home	44 86.3%	8 88.9%	36 85.7%	18 90.0%	19 82.6%	7 87.5%	19 82.6%	23 88.5%	20 80.0%	24 92.3%
Duplex, triplex or quadruplex	4 7.8%	1 11.1%	3 7.1%	1 5.0%	3 13.0%	0 0.0%	3 13.0%	1 3.8%	2 8.0%	2 7.7%
Townhome	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Loft	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Unit in a low-rise building with 1-3 floors	2 3.9%	0 0.0%	2 4.8%	1 5.0%	1 4.3%	0 0.0%	1 4.3%	1 3.8%	2 8.0%	0 0.0%
Unit in a mid-rise building with 4-8 floors	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Unit in a high-rise building with 9 or more floors	1 2.0%	0 0.0%	1 2.4%	0 0.0%	0 0.0%	1 12.5%	0 0.0%	1 3.8%	1 4.0%	0 0.0%

Q.8 How many bedrooms and bathrooms do you have in your residence?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51	9	42	20	23	8	23	26	25	26
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1 BR/ 1B	5	0	5	2	2	1	4	1	4	1
	9.8%	0.0%	11.9%	10.0%	8.7%	12.5%	17.4%	3.8%	16.0%	3.8%
2 BR/ 1B	8	0	8	2	5	1	6	2	4	4
	15.7%	0.0%	19.0%	10.0%	21.7%	12.5%	26.1%	7.7%	16.0%	15.4%
2 BR/ 1.5B	1	0	1	0	1	0	1	0	1	0
	2.0%	0.0%	2.4%	0.0%	4.3%	0.0%	4.3%	0.0%	4.0%	0.0%
2 BR/ 2B	2	0	2	0	1	1	1	1	1	1
	3.9%	0.0%	4.8%	0.0%	4.3%	12.5%	4.3%	3.8%	4.0%	3.8%
3 BR/ 2B	11	3	8	6	5	0	4	7	6	5
	21.6%	33.3%	19.0%	30.0%	21.7%	0.0%	17.4%	26.9%	24.0%	19.2%
3 BR/ 2.5B	4	1	3	1	2	1	0	3	1	3
	7.8%	11.1%	7.1%	5.0%	8.7%	12.5%	0.0%	11.5%	4.0%	11.5%
3 BR/ 3B	1	1	0	1	0	0	0	1	0	1
	2.0%	11.1%	0.0%	5.0%	0.0%	0.0%	0.0%	3.8%	0.0%	3.8%
4 BR/ 3-4B	4	0	4	0	3	1	1	3	0	4
	7.8%	0.0%	9.5%	0.0%	13.0%	12.5%	4.3%	11.5%	0.0%	15.4%
4 BR/ <3B	5	2	3	2	1	2	1	4	2	3
	9.8%	22.2%	7.1%	10.0%	4.3%	25.0%	4.3%	15.4%	8.0%	11.5%
3 BR/ 1B	7	0	7	6	1	0	4	2	5	2
	13.7%	0.0%	16.7%	30.0%	4.3%	0.0%	17.4%	7.7%	20.0%	7.7%
5 BR/ 3B	1	0	1	0	1	0	0	1	0	1
	2.0%	0.0%	2.4%	0.0%	4.3%	0.0%	0.0%	3.8%	0.0%	3.8%
6 BR/ 4-5B	2	2	0	0	1	1	1	1	1	1
	3.9%	22.2%	0.0%	0.0%	4.3%	12.5%	4.3%	3.8%	4.0%	3.8%

Q.9 And how many parking spaces do you have?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
None	1 2.0%	0 0.0%	1 2.4%	0 0.0%	0 0.0%	1 12.5%	1 4.3%	0 0.0%	0 0.0%	1 3.8%
One	12 23.5%	0 0.0%	12 28.6%	5 25.0%	6 26.1%	1 12.5%	8 34.8%	4 15.4%	8 32.0%	4 15.4%
Two	17 33.3%	4 44.4%	13 31.0%	8 40.0%	6 26.1%	3 37.5%	7 30.4%	9 34.6%	7 28.0%	10 38.5%
Three	4 7.8%	0 0.0%	4 9.5%	0 0.0%	3 13.0%	1 12.5%	2 8.7%	2 7.7%	1 4.0%	3 11.5%
Four or more	17 33.3%	5 55.6%	12 28.6%	7 35.0%	8 34.8%	2 25.0%	5 21.7%	11 42.3%	9 36.0%	8 30.8%

Q.10 Would you describe it as a new, recently built or renovated, fairly old not renovated, or historic structure?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
New	1 2.0%	0 0.0%	1 2.4%	0 0.0%	1 4.3%	0 0.0%	1 4.3%	0 0.0%	1 4.0%	0 0.0%
Recently built or renovated	7 13.7%	2 22.2%	5 11.9%	2 10.0%	3 13.0%	2 25.0%	6 26.1%	1 3.8%	5 20.0%	2 7.7%
Fairly old not renovated	7 13.7%	0 0.0%	7 16.7%	1 5.0%	4 17.4%	2 25.0%	4 17.4%	2 7.7%	4 16.0%	3 11.5%
Historic	36 70.6%	7 77.8%	29 69.0%	17 85.0%	15 65.2%	4 50.0%	12 52.2%	23 88.5%	15 60.0%	21 80.8%

June 2005

Q.11 Do you own or rent your residence?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Own	41 80.4%	9 100.0%	32 76.2%	17 85.0%	18 78.3%	6 75.0%	16 69.6%	24 92.3%	19 76.0%	22 84.6%
Rent	10 19.6%	0 0.0%	10 23.8%	3 15.0%	5 21.7%	2 25.0%	7 30.4%	2 7.7%	6 24.0%	4 15.4%

June 2005

Q.12 Does your residence rent for $1,000 or more, or less than $1,000 per month?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	10 100.0%	0 100.0%	10 100.0%	3 100.0%	5 100.0%	2 100.0%	7 100.0%	2 100.0%	6 100.0%	4 100.0%
$1,000 or more	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Less than $1,000	10 100.0%	0 0.0%	10 100.0%	3 100.0%	5 100.0%	2 100.0%	7 100.0%	2 100.0%	6 100.0%	4 100.0%

June 2005

Q.13 Since you have had experience living in downtown Oklahoma City, what do you consider to be the principal advantages to living there?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Centrally located	14 27.5%	1 11.1%	13 31.0%	7 35.0%	7 30.4%	0 0.0%	5 21.7%	9 34.6%	5 20.0%	9 34.6%
Close to job/school	15 29.4%	5 55.6%	10 23.8%	7 35.0%	6 26.1%	2 25.0%	3 13.0%	11 42.3%	8 32.0%	7 26.9%
Close to activities downtown (library, bricktown, etc.)	21 41.2%	3 33.3%	18 42.9%	7 35.0%	10 43.5%	4 50.0%	8 34.8%	12 46.2%	9 36.0%	12 46.2%
Historic neighborhood/ house	10 19.6%	2 22.2%	8 19.0%	3 15.0%	7 30.4%	0 0.0%	2 8.7%	8 30.8%	5 20.0%	5 19.2%
Easy access to highways	5 9.8%	2 22.2%	3 7.1%	1 5.0%	3 13.0%	1 12.5%	4 17.4%	1 3.8%	0 0.0%	5 19.2%
Nice neighborhood/ neighborhood features (sidewalks with trees, etc.)	5 9.8%	3 33.3%	2 4.8%	2 10.0%	3 13.0%	0 0.0%	1 4.3%	4 15.4%	2 8.0%	3 11.5%

(continued)

Q.13 Since you have had experience living in downtown Oklahoma City, what do you consider to be the principal advantages to living there?

(continued)

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Recent developments	2 3.9%	0 0.0%	2 4.8%	2 10.0%	0 0.0%	0 0.0%	1 4.3%	0 0.0%	2 8.0%	0 0.0%
Proximity to health services	2 3.9%	0 0.0%	2 4.8%	1 5.0%	0 0.0%	1 12.5%	2 8.7%	0 0.0%	1 4.0%	1 3.8%
Other	6 11.8%	1 11.1%	5 11.9%	0 0.0%	3 13.0%	3 37.5%	3 13.0%	3 11.5%	3 12.0%	3 11.5%
Don't know	1 2.0%	0 0.0%	1 2.4%	1 5.0%	0 0.0%	0 0.0%	1 4.3%	0 0.0%	1 4.0%	0 0.0%
None/nothing	2 3.9%	0 0.0%	2 4.8%	0 0.0%	0 0.0%	2 25.0%	2 8.7%	0 0.0%	0 0.0%	2 7.7%

Q.14 And what do you consider to be the disadvantages, if any, to living in downtown Oklahoma City?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Crime/drugs/gangs/vagrants/safety	14 27.5%	3 33.3%	11 26.2%	7 35.0%	6 26.1%	1 12.5%	7 30.4%	6 23.1%	7 28.0%	7 26.9%
Traffic	7 13.7%	0 0.0%	7 16.7%	4 20.0%	2 8.7%	1 12.5%	6 26.1%	1 3.8%	4 16.0%	3 11.5%
Lack of grocery stores	9 17.6%	4 44.4%	5 11.9%	4 20.0%	3 13.0%	2 25.0%	3 13.0%	5 19.2%	3 12.0%	6 23.1%
Deteriorating homes/neighborhoods/urban blight	8 15.7%	2 22.2%	6 14.3%	3 15.0%	5 21.7%	0 0.0%	2 8.7%	6 23.1%	2 8.0%	6 23.1%
Schools	3 5.9%	2 22.2%	1 2.4%	1 5.0%	2 8.7%	0 0.0%	0 0.0%	3 11.5%	2 8.0%	1 3.8%
Noise	3 5.9%	0 0.0%	3 7.1%	2 10.0%	1 4.3%	0 0.0%	1 4.3%	2 7.7%	2 8.0%	1 3.8%
Other	9 17.6%	0 0.0%	9 21.4%	4 20.0%	2 8.7%	3 37.5%	5 21.7%	4 15.4%	6 24.0%	3 11.5%
Don't know	4 7.8%	0 0.0%	4 9.5%	1 5.0%	3 13.0%	0 0.0%	2 8.7%	2 7.7%	1 4.0%	3 11.5%
None/nothing	8 15.7%	1 11.1%	7 16.7%	1 5.0%	4 17.4%	3 37.5%	5 21.7%	3 11.5%	6 24.0%	2 7.7%

Q.15 Downtown Oklahoma City has many things that make it an interesting and exciting place. Is there anything that you can think of that would make downtown Oklahoma City a more enjoyable and desirable place to live?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Better parking/cheaper parking	8 15.7%	0 0.0%	8 19.0%	5 25.0%	3 13.0%	0 0.0%	6 26.1%	2 7.7%	5 20.0%	3 11.5%
More shopping facilities	14 27.5%	4 44.4%	10 23.8%	2 10.0%	7 30.4%	5 62.5%	6 26.1%	7 26.9%	5 20.0%	9 34.6%
More grocery stores	4 7.8%	1 11.1%	3 7.1%	1 5.0%	3 13.0%	0 0.0%	0 0.0%	4 15.4%	1 4.0%	3 11.5%
Law enforcement/less crime	4 7.8%	3 33.3%	1 2.4%	3 15.0%	1 4.3%	0 0.0%	1 4.3%	2 7.7%	1 4.0%	3 11.5%
Improve streets/traffic	4 7.8%	0 0.0%	4 9.5%	3 15.0%	1 4.3%	0 0.0%	1 4.3%	2 7.7%	2 8.0%	2 7.7%
Public transportation	3 5.9%	0 0.0%	3 7.1%	0 0.0%	2 8.7%	1 12.5%	2 8.7%	1 3.8%	1 4.0%	2 7.7%
Continue cultural development/activities	6 11.8%	1 11.1%	5 11.9%	2 10.0%	4 17.4%	0 0.0%	3 13.0%	3 11.5%	5 20.0%	1 3.8%
Better/different housing options	3 5.9%	0 0.0%	3 7.1%	0 0.0%	2 8.7%	1 12.5%	0 0.0%	3 11.5%	1 4.0%	2 7.7%

(continued)

Q.15 Downtown Oklahoma City has many things that make it an interesting and exciting place. Is there anything that you can think of that would make downtown Oklahoma City a more enjoyable and desirable place to live?

(continued)

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Other	11 21.6%	2 22.2%	9 21.4%	6 30.0%	3 13.0%	2 25.0%	5 21.7%	5 19.2%	5 20.0%	6 23.1%
Don't know	3 5.9%	1 11.1%	2 4.8%	1 5.0%	2 8.7%	0 0.0%	1 4.3%	2 7.7%	2 8.0%	1 3.8%
None/nothing	4 7.8%	1 11.1%	3 7.1%	3 15.0%	1 4.3%	0 0.0%	3 13.0%	1 3.8%	2 8.0%	2 7.7%

Q.16a Looking ahead, do you expect to remain in your current residence over the next 1-2 years, or would you want or expect to more to a different location or type of residence?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Remain in current residence	43 84.3%	9 100.0%	34 81.0%	17 85.0%	18 78.3%	8 100.0%	17 73.9%	24 92.3%	22 88.0%	21 80.8%
Move to a different location or type of residence	8 15.7%	0 0.0%	8 19.0%	3 15.0%	5 21.7%	0 0.0%	6 26.1%	2 7.7%	3 12.0%	5 19.2%

June 2005

Q.16b (IF MOVE) If you were to move, would you want to stay downtown or move elsewhere?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	8 100.0%	0 100.0%	8 100.0%	3 100.0%	5 100.0%	0 100.0%	6 100.0%	2 100.0%	3 100.0%	5 100.0%
Stay downtown	5 62.5%	0 0.0%	5 62.5%	2 66.7%	3 60.0%	0 0.0%	4 66.7%	1 50.0%	2 66.7%	3 60.0%
Move elsewhere	3 37.5%	0 0.0%	3 37.5%	1 33.3%	2 40.0%	0 0.0%	2 33.3%	1 50.0%	1 33.3%	2 40.0%

June 2005

Q.16c (IF STAY DOWNTOWN) What type of residence would you want to move to?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	5 100.0%	0 100.0%	5 100.0%	2 100.0%	3 100.0%	0 100.0%	4 100.0%	1 100.0%	2 100.0%	3 100.0%
A townhouse	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
A loft in an historic building	1 20.0%	0 0.0%	1 20.0%	0 0.0%	1 33.3%	0 0.0%	1 25.0%	0 0.0%	0 0.0%	1 33.3%
A unit in a low-rise building with 1-3 floors	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
A unit in a mid-rise building with 4-8 floors	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
A unit in a high-rise building with 9 or more floors	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Single family home	4 80.0%	0 0.0%	4 80.0%	2 100.0%	2 66.7%	0 0.0%	3 75.0%	1 100.0%	2 100.0%	2 66.7%

Q.17 Including yourself, how many people live in your household?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
One	15 29.4%	0 0.0%	15 35.7%	3 15.0%	8 34.8%	4 50.0%	7 30.4%	8 30.8%	8 32.0%	7 26.9%
Two	20 39.2%	4 44.4%	16 38.1%	7 35.0%	10 43.5%	3 37.5%	7 30.4%	11 42.3%	8 32.0%	12 46.2%
Three	8 15.7%	1 11.1%	7 16.7%	5 25.0%	3 13.0%	0 0.0%	5 21.7%	3 11.5%	5 20.0%	3 11.5%
Four	6 11.8%	2 22.2%	4 9.5%	5 25.0%	1 4.3%	0 0.0%	3 13.0%	3 11.5%	3 12.0%	3 11.5%
Five or more	2 3.9%	2 22.2%	0 0.0%	0 0.0%	1 4.3%	1 12.5%	1 4.3%	1 3.8%	1 4.0%	1 3.8%

June 2005

Q.18 How many children under 18 years of age lie in your household?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
None	36 70.6%	4 44.4%	32 76.2%	11 55.0%	19 82.6%	6 75.0%	13 56.5%	21 80.8%	18 72.0%	18 69.2%
One	9 17.6%	2 22.2%	7 16.7%	5 25.0%	3 13.0%	1 12.5%	8 34.8%	1 3.8%	4 16.0%	5 19.2%
Two	6 11.8%	3 33.3%	3 7.1%	4 20.0%	1 4.3%	1 12.5%	2 8.7%	4 15.4%	3 12.0%	3 11.5%
Three	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Four or more	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%

June 2005

Q.19 What was the last year of formal education you completed?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Less than high school	2 3.9%	0 0.0%	2 4.8%	1 5.0%	1 4.3%	0 0.0%	2 8.7%	0 0.0%	2 8.0%	0 0.0%
High school graduate	4 7.8%	0 0.0%	4 9.5%	2 10.0%	1 4.3%	1 12.5%	3 13.0%	0 0.0%	3 12.0%	1 3.8%
Some college, business or technical school	13 25.5%	1 11.1%	12 28.6%	5 25.0%	6 26.1%	2 25.0%	9 39.1%	4 15.4%	5 20.0%	8 30.8%
Business or technical school graduate	2 3.9%	0 0.0%	2 4.8%	2 10.0%	0 0.0%	0 0.0%	1 4.3%	1 3.8%	1 4.0%	1 3.8%
Four year college degree	9 17.6%	1 11.1%	8 19.0%	4 20.0%	3 13.0%	2 25.0%	5 21.7%	4 15.4%	7 28.0%	2 7.7%
Post-graduate degree	21 41.2%	7 77.8%	14 33.3%	6 30.0%	12 52.2%	3 37.5%	3 13.0%	17 65.4%	7 28.0%	14 53.8%

Q.20 What is your current employment status?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Employed	39 76.5%	9 100.0%	30 71.4%	19 95.0%	17 73.9%	3 37.5%	15 65.2%	23 88.5%	21 84.0%	18 69.2%
Unemployed	2 3.9%	0 0.0%	2 4.8%	0 0.0%	2 8.7%	0 0.0%	2 8.7%	0 0.0%	0 0.0%	2 7.7%
In the armed forces	1 2.0%	0 0.0%	1 2.4%	1 5.0%	0 0.0%	0 0.0%	1 4.3%	0 0.0%	1 4.0%	0 0.0%
Not in the labor force or retired	9 17.6%	0 0.0%	9 21.4%	0 0.0%	4 17.4%	5 62.5%	5 21.7%	3 11.5%	3 12.0%	6 23.1%

June 2005

Q.21 (IF EMPLOYED) What industry are you employed in?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	39 100.0%	9 100.0%	30 100.0%	19 100.0%	17 100.0%	3 100.0%	15 100.0%	23 100.0%	21 100.0%	18 100.0%
Manufacturing	2 5.1%	0 0.0%	2 6.7%	2 10.5%	0 0.0%	0 0.0%	2 13.3%	0 0.0%	2 9.5%	0 0.0%
Medical services	10 25.6%	2 22.2%	8 26.7%	2 10.5%	6 35.3%	2 66.7%	3 20.0%	7 30.4%	4 19.0%	6 33.3%
Legal services	4 10.3%	4 44.4%	0 0.0%	3 15.8%	1 5.9%	0 0.0%	0 0.0%	4 17.4%	1 4.8%	3 16.7%
Government (including school districts)	10 25.6%	0 0.0%	10 33.3%	4 21.1%	6 35.3%	0 0.0%	4 26.7%	6 26.1%	5 23.8%	5 27.8%
Wholesale or retail trade	2 5.1%	1 11.1%	1 3.3%	1 5.3%	1 5.9%	0 0.0%	1 6.7%	0 0.0%	2 9.5%	0 0.0%
Transportation	1 2.6%	0 0.0%	1 3.3%	1 5.3%	0 0.0%	0 0.0%	1 6.7%	0 0.0%	1 4.8%	0 0.0%
Business services	5 12.8%	1 11.1%	4 13.3%	4 21.1%	1 5.9%	0 0.0%	2 13.3%	3 13.0%	4 19.0%	1 5.6%
Some other industry	5 12.8%	1 11.1%	4 13.3%	2 10.5%	2 11.8%	1 33.3%	2 13.3%	3 13.0%	2 9.5%	3 16.7%

Survey of Downtown Oklahoma City Residents

Q.22 Age

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Under 25	1 2.0%	0 0.0%	1 2.4%	1 5.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 4.0%	0 0.0%
25 - 34	9 17.6%	1 11.1%	8 19.0%	9 45.0%	0 0.0%	0 0.0%	7 30.4%	2 7.7%	7 28.0%	2 7.7%
35 - 44	10 19.6%	4 44.4%	6 14.3%	10 50.0%	0 0.0%	0 0.0%	2 8.7%	8 30.8%	5 20.0%	5 19.2%
45 - 54	12 23.5%	0 0.0%	12 28.6%	0 0.0%	12 52.2%	0 0.0%	4 17.4%	8 30.8%	4 16.0%	8 30.8%
55 - 64	11 21.6%	3 33.3%	8 19.0%	0 0.0%	11 47.8%	0 0.0%	6 26.1%	5 19.2%	5 20.0%	6 23.1%
65 - 74	5 9.8%	1 11.1%	4 9.5%	0 0.0%	0 0.0%	5 62.5%	3 13.0%	2 7.7%	2 8.0%	3 11.5%
75 or older	3 5.9%	0 0.0%	3 7.1%	0 0.0%	0 0.0%	3 37.5%	1 4.3%	1 3.8%	1 4.0%	2 7.7%
Refused	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%

June 2005

Q.24 Which one of the following ethnic classifications best describes you?

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
White	32 62.7%	7 77.8%	25 59.5%	14 70.0%	14 60.9%	4 50.0%	14 60.9%	17 65.4%	16 64.0%	16 61.5%
Hispanic or Latino	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
African-American	9 17.6%	0 0.0%	9 21.4%	2 10.0%	4 17.4%	3 37.5%	4 17.4%	5 19.2%	5 20.0%	4 15.4%
Asian	1 2.0%	0 0.0%	1 2.4%	1 5.0%	0 0.0%	0 0.0%	1 4.3%	0 0.0%	1 4.0%	0 0.0%
Native American	4 7.8%	1 11.1%	3 7.1%	1 5.0%	2 8.7%	1 12.5%	2 8.7%	2 7.7%	1 4.0%	3 11.5%
Other	2 3.9%	1 11.1%	1 2.4%	0 0.0%	2 8.7%	0 0.0%	1 4.3%	1 3.8%	0 0.0%	2 7.7%
Refused	3 5.9%	0 0.0%	3 7.1%	2 10.0%	1 4.3%	0 0.0%	1 4.3%	1 3.8%	2 8.0%	1 3.8%

June 2005

Q.25 Annual household income.

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Less than $35,000	13 25.5%	0 0.0%	13 31.0%	3 15.0%	6 26.1%	4 50.0%	13 56.5%	0 0.0%	5 20.0%	8 30.8%
$35,000 - $50,000	10 19.6%	2 22.2%	8 19.0%	6 30.0%	4 17.4%	0 0.0%	10 43.5%	0 0.0%	7 28.0%	3 11.5%
$50,000 - $75,000	10 19.6%	0 0.0%	10 23.8%	4 20.0%	4 17.4%	2 25.0%	0 0.0%	10 38.5%	7 28.0%	3 11.5%
$75,000 - $100,000	2 3.9%	2 22.2%	0 0.0%	2 10.0%	0 0.0%	0 0.0%	0 0.0%	2 7.7%	1 4.0%	1 3.8%
$100,000 - $150,000	5 9.8%	0 0.0%	5 11.9%	1 5.0%	4 17.4%	0 0.0%	0 0.0%	5 19.2%	2 8.0%	3 11.5%
Over $150,000	9 17.6%	5 55.6%	4 9.5%	3 15.0%	5 21.7%	1 12.5%	0 0.0%	9 34.6%	2 8.0%	7 26.9%
Refused	2 3.9%	0 0.0%	2 4.8%	1 5.0%	0 0.0%	1 12.5%	0 0.0%	0 0.0%	1 4.0%	1 3.8%

Q.26 Gender

		Work Downtown		Age Group			HH Income		Gender	
	Total	Yes	No	Under 45	45-54	65 or older	Under $50K	$50K Plus	Male	Fe-male
Base	51 100.0%	9 100.0%	42 100.0%	20 100.0%	23 100.0%	8 100.0%	23 100.0%	26 100.0%	25 100.0%	26 100.0%
Male	25 49.0%	4 44.4%	21 50.0%	13 65.0%	9 39.1%	3 37.5%	12 52.2%	12 46.2%	25 100.0%	0 0.0%
Female	26 51.0%	5 55.6%	21 50.0%	7 35.0%	14 60.9%	5 62.5%	11 47.8%	14 53.8%	0 0.0%	26 100.0%

June 2005

VIII. Non-Downtown Residents Results Tables

Survey of Non-Downtown Oklahoma City Residents

Q.1 Do you or another head of household work downtown?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Yes	55 16%	55 100% B	0 0%	10 15%	8 13%	20 26% G	12 18% g	4 6%	14 12%	27 23% h	9 17%	22 16%	33 15%
No	295 84%	0 0%	295 100% A	56 85%	56 88%	58 74%	55 82%	58 94% Ef	103 88% i	93 78%	43 83%	113 84%	182 85%

June 2005

Q.2a Is your primary residence a...

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Single family detached home	331 95%	52 95%	279 95%	59 89%	61 95%	76 97% c	66 99% c	57 92%	100 85%	119 99% H	52 100% H	130 96%	201 93%
Duplex, triplex or quadplex	8 2%	0 0%	8 3%	3 5%	3 5%	0 0%	1 1%	1 2%	7 6% i	1 1%	0 0%	2 1%	6 3%
Townhome	2 1%	1 2%	1 0%	2 3%	0 0%	0 0%	0 0%	0 0%	2 2%	0 0%	0 0%	0 0%	2 1%
Condominium	2 1%	0 0%	2 1%	0 0%	0 0%	1 1%	0 0%	1 2%	2 2%	0 0%	0 0%	0 0%	2 1%
Apartment	3 1%	2 4% b	1 0%	2 3%	0 0%	1 1%	0 0%	0 0%	3 3%	0 0%	0 0%	2 1%	1 0%
Loft	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Retirement center	3 1%	0 0%	3 1%	0 0%	0 0%	0 0%	0 0%	3 5% e	3 3%	0 0%	0 0%	1 1%	2 1%
Refused	1 0%	0 0%	1 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	1 0%

Q.2b Do you own or rent your residence?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	348 100%	55 100% (A)	293 100% (B)	65 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	61 100% (G)	116 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	213 100% (L)
Own	315 91%	50 91%	265 90%	49 75%	59 92% C	74 95% C	65 97% C	57 93% C	93 80%	115 96% H	50 96% H	125 93%	190 89%
Rent	33 9%	5 9%	28 10%	16 25% DEFG	5 8%	4 5%	2 3%	4 7%	23 20% IJ	5 4%	2 4%	10 7%	23 11%

Q.2c (IF RENT) Does your residence rent for $1,000 or more, or less than $1,000 per month?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	33 100%	5 100% (A)	28 100% (B)	16 100% (C)	5 100% (D)	4 100% (E)	2 100% (F)	4 100% (G)	23 100% (H)	5 100% (I)	2 100% (J)	10 100% (K)	23 100% (L)
$1,000 or more	9 27%	3 60%	6 21%	3 19%	0 0%	2 50%	1 50%	3 75%	5 22%	2 40%	1 50%	3 30%	6 26%
Less than $1,000	21 64%	1 20%	20 71%	12 75%	5 100%	1 25%	1 50%	0 0%	17 74%	2 40%	1 50%	7 70%	14 61%
Refused	3 9%	1 20%	2 7%	1 6%	0 0%	1 25%	0 0%	1 25%	1 4%	1 20%	0 0%	0 0%	3 13%

June 2005

Q.3 How long have you lived in the Oklahoma City area?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
1 year or less	13 4%	2 4%	11 4%	4 6% f	4 6% f	1 1%	0 0%	3 5%	8 7%	4 3%	0 0%	6 4%	7 3%
2 - 5 years	41 12%	6 11%	35 12%	22 33% DEFG	7 11%	7 9%	2 3%	3 5%	23 20% I	8 7%	7 13%	12 9%	29 13%
6 - 10 years	26 7%	2 4%	24 8%	7 11%	5 8%	3 4%	8 12%	3 5%	6 5%	16 13% h	2 4%	10 7%	16 7%
11 - 20 years	55 16%	10 18%	45 15%	12 18% g	15 23% G	15 19% g	9 13%	3 5%	16 14%	18 15%	10 19%	21 16%	34 16%
More than 20 years	215 61%	35 64%	180 61%	21 32%	33 52% c	52 67% C	48 72% Cd	50 81% CD	64 55%	74 62%	33 63%	86 64%	129 60%

June 2005

Q.4a On average, how often do you visit downtown for reasons other than work related activities?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
More than once a week	33 9%	10 18% b	23 8%	6 9%	6 9%	9 12%	4 6%	7 11%	11 9%	10 8%	7 13%	17 13%	16 7%
2 - 4 times a month	85 24%	19 35%	66 22%	24 36% fG	15 23%	19 24%	14 21%	9 15%	25 21%	33 28%	15 29%	44 33% L	41 19%
Once a month	70 20%	10 18%	60 20%	13 20%	19 30% g	15 19%	15 22%	7 11%	22 19%	29 24%	12 23%	27 20%	43 20%
Or less than once a month	162 46%	16 29%	146 49% A	23 35%	24 38%	35 45%	34 51%	39 63% CDe	59 50%	48 40%	18 35%	47 35%	115 53% K

June 2005

Survey of Non-Downtown Oklahoma City Residents

Q.4b Other than work-related visits, which of the following activities do you pursue in downtown Oklahoma City?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Sporting events	215 61%	44 80% B	171 58%	41 62%	43 67% g	55 71% G	40 60%	30 48%	65 56%	83 69% h	33 63%	86 64%	129 60%
Theater or movies	168 48%	38 69% B	130 44%	37 56%	32 50%	37 47%	29 43%	26 42%	46 39%	65 54% h	33 63% H	64 47%	104 48%
Festivals or parades	186 53%	33 60%	153 52%	32 48%	40 63% g	46 59% g	36 54%	26 42%	54 46%	68 57%	35 67% h	70 52%	116 54%
Parks and recreation	122 35%	19 35%	103 35%	29 44%	25 39%	24 31%	21 31%	19 31%	40 34%	45 38%	19 37%	47 35%	75 35%
Eating out	276 79%	47 85%	229 78%	56 85%	56 88% g	61 78%	50 75%	44 71%	80 68%	105 88% H	46 88% H	104 77%	172 80%

(continued)

Survey of Non-Downtown Oklahoma City Residents

Q.4b Other than work-related visits, which of the following activities do you pursue in downtown Oklahoma City? (continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Night clubs	63 18%	16 29% b	47 16%	27 41% dEFG	14 22% Fg	13 17% f	4 6%	5 8%	25 21%	20 17%	13 25%	29 21%	34 16%
Shopping	98 28%	16 29%	82 28%	28 42% dG	16 25%	21 27%	18 27%	13 21%	33 28%	37 31%	12 23%	42 31%	56 26%
Banking or personal finance	29 8%	12 22% B	17 6%	3 5%	6 9%	9 12%	5 7%	5 8%	9 8%	10 8%	7 13%	13 10%	16 7%
Library or learning activities	70 20%	20 36% B	50 17%	11 17%	14 22%	14 18%	15 22%	10 16%	23 20%	26 22%	13 25%	30 22%	40 19%
Medical/health care	71 20%	15 27%	56 19%	11 17%	5 8%	18 23% d	17 25% D	19 31% D	24 21%	26 22%	9 17%	32 24%	39 18%

(continued)

Q.4b Other than work-related visits, which of the following activities do you pursue in downtown Oklahoma City?

(continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
City, county or federal government services	84 24%	15 27%	69 23%	10 15%	13 20%	23 29% c	16 24%	21 34% c	27 23%	31 26%	13 25%	38 28%	46 21%
Site-seeing	187 53%	27 49%	160 54%	34 52%	28 44%	43 55%	40 60%	35 56%	58 50%	74 62%	24 46%	67 50%	120 56%
None	16 5%	1 2%	15 5%	1 2%	1 2%	1 1%	4 6%	8 13% cdE	11 9% Ij	2 2%	0 0%	6 4%	10 5%

June 2005

Q.5a Have you ever lived in the downtown area of any city?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Yes	60 17%	14 25%	46 16%	10 15%	5 8%	15 19%	14 21% d	14 23% d	19 16%	23 19%	11 21%	30 22% l	30 14%
No	290 83%	41 75%	249 84%	56 85%	59 92% fg	63 81%	53 79%	48 77%	98 84%	97 81%	41 79%	105 78%	185 86% k

June 2005

Q.5b (IF YES) Where?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	60 100%	14 100% (A)	46 100% (B)	10 100% (C)	5 100% (D)	15 100% (E)	14 100% (F)	14 100% (G)	19 100% (H)	23 100% (I)	11 100% (J)	30 100% (K)	30 100% (L)
Oklahoma City	16 27%	4 29%	12 26%	3 30%	0 0%	3 20%	5 36%	4 29%	5 26%	5 22%	5 45%	8 27%	8 27%
Norman	3 5%	1 7%	2 4%	1 10%	0 0%	1 7%	1 7%	0 0%	2 11%	1 4%	0 0%	1 3%	2 7%
Chicago	3 5%	2 14%	1 2%	1 10%	0 0%	1 7%	1 7%	0 0%	1 5%	1 4%	1 9%	1 3%	2 7%
San Francisco	4 7%	1 7%	3 7%	0 0%	0 0%	1 7%	0 0%	2 14%	1 5%	1 4%	1 9%	3 10%	1 3%
Dallas	3 5%	1 7%	2 4%	1 10%	0 0%	1 7%	1 7%	0 0%	2 11%	0 0%	1 9%	2 7%	1 3%
Tulsa	4 7%	0 0%	4 9%	0 0%	2 40%	1 7%	0 0%	1 7%	1 5%	1 4%	2 18%	1 3%	3 10%
Other	36 60%	8 57%	28 61%	5 50%	3 60%	10 67%	8 57%	9 64%	9 47%	16 70%	5 45%	21 70%	15 50%

Q.6a If housing that fit your needs was available in downtown Oklahoma City at a price or rent you could afford, how likely would you be to move downtown?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Very likely	19 5%	5 9%	14 5%	7 11%	2 3%	4 5%	4 6%	2 3%	8 7%	7 6%	4 8%	5 4%	14 7%
Somewhat likely	27 8%	7 13%	20 7%	6 9%	5 8%	10 13%	3 4%	3 5%	10 9%	12 10%	2 4%	14 10%	13 6%
Unlikely	132 38%	19 35%	113 38%	28 42%	25 39%	31 40%	26 39%	17 27%	36 31%	52 43% h	20 38%	43 32%	89 41%
Absolutely would not	172 49%	24 44%	148 50%	25 38%	32 50%	33 42%	34 51%	40 65% CE	63 54% i	49 41%	26 50%	73 54%	99 46%

June 2005

Q.6b What is the single most important reason you say that?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	307 100%	50 100% (A)	257 100% (B)	59 100% (C)	57 100% (D)	68 100% (E)	55 100% (F)	56 100% (G)	98 100% (H)	110 100% (I)	44 100% (J)	119 100% (K)	188 100% (L)
I like where I live/happy where I am now	30 10%	2 4%	28 11%	4 7%	4 7%	8 12%	6 11%	8 14%	9 9%	10 9%	4 9%	9 8%	21 11%
Congestion/too crowded/too many people/too busy/too noisy	31 10%	6 12%	25 10%	6 10%	5 9%	5 7%	10 18%	5 9%	13 13% j	13 12%	1 2%	15 13%	16 9%
Traffic	6 2%	0 0%	6 2%	1 2%	2 4%	2 3%	1 2%	0 0%	1 1%	4 4%	0 0%	3 3%	3 2%
Already own house/settled in current location	28 9%	4 8%	24 9%	4 7%	1 2%	8 12% d	5 9%	7 13% d	10 10%	6 5%	6 14%	11 9%	17 9%

(continued)

Q.6b What is the single most important reason you say that?
(continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	307 100%	50 100% (A)	257 100% (B)	59 100% (C)	57 100% (D)	68 100% (E)	55 100% (F)	56 100% (G)	98 100% (H)	110 100% (I)	44 100% (J)	119 100% (K)	188 100% (L)
Like living in suburbs/country	44 14%	10 20%	34 13%	6 10%	10 18%	12 18%	8 15%	6 11%	16 16%	14 13%	7 16%	21 18%	23 12%
Don't want to move/move again	7 2%	1 2%	6 2%	0 0%	1 2%	2 3%	1 2%	3 5%	4 4%	2 2%	1 2%	1 1%	6 3%
Too old/retired	14 5%	0 0%	14 5%	0 0%	0 0%	1 1%	4 7% cd	7 13% CDe	5 5%	4 4%	0 0%	3 3%	11 6%
Downtown not safe/crime/security issues	15 5%	6 12% b	9 4%	2 3%	4 7%	5 7%	2 4%	2 4%	5 5%	8 7%	0 0%	6 5%	9 5%

(continued)

Q.6b What is the single most important reason you say that?

(continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	307 100%	50 100% (A)	257 100% (B)	59 100% (C)	57 100% (D)	68 100% (E)	55 100% (F)	56 100% (G)	98 100% (H)	110 100% (I)	44 100% (J)	119 100% (K)	188 100% (L)
Like having space/acreage /yard/no neighbors	25 8%	5 10%	20 8%	4 7%	7 12%	4 6%	6 11%	4 7%	4 4%	11 10%	5 11%	9 8%	16 9%
Downtown schools not good	10 3%	3 6%	7 3%	3 5%	5 9% fg	2 3%	0 0%	0 0%	2 2%	6 5%	2 5%	4 3%	6 3%
Not a good environment to raise kids	15 5%	1 2%	14 5%	6 10% eg	7 12% efG	1 1%	1 2%	0 0%	3 3%	4 4%	7 16% HI	4 3%	11 6%

(continued)

Q.6b What is the single most important reason you say that?

(continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	307 100%	50 100% (A)	257 100% (B)	59 100% (C)	57 100% (D)	68 100% (E)	55 100% (F)	56 100% (G)	98 100% (H)	110 100% (I)	44 100% (J)	119 100% (K)	188 100% (L)
Lack of parking	3 1%	0 0%	3 1%	1 2%	0 0%	1 1%	0 0%	0 0%	2 2%	1 1%	0 0%	2 2%	1 1%
Don't like living in city/not a city person	29 9%	2 4%	27 11%	8 14%	3 5%	4 6%	4 7%	7 13%	8 8%	8 7%	6 14%	16 13%	13 7%
Like downtown (NFI)	10 3%	4 8% b	6 2%	1 2%	2 4%	3 4%	2 4%	2 4%	2 2%	6 5%	1 2%	5 4%	5 3%

(continued)

Q.6b What is the single most important reason you say that?
(continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	307 100%	50 100% (A)	257 100% (B)	59 100% (C)	57 100% (D)	68 100% (E)	55 100% (F)	56 100% (G)	98 100% (H)	110 100% (I)	44 100% (J)	119 100% (K)	188 100% (L)
Cost would be a factor	10 3%	3 6%	7 3%	4 7% g	1 2%	4 6%	1 2%	0 0%	3 3%	3 3%	1 2%	4 3%	6 3%
Downtown is close to school/work	3 1%	1 2%	2 1%	2 3%	0 0%	1 1%	0 0%	0 0%	2 2%	1 1%	0 0%	0 0%	3 2%
Nothing downtown that I do/don't work downtown	8 3%	0 0%	8 3%	3 5%	2 4%	2 3%	0 0%	0 0%	1 1%	2 2%	0 0%	1 1%	7 4%
Want to be close to culture/arts/entertainment/downtown parks	6 2%	1 2%	5 2%	2 3%	1 2%	2 3%	0 0%	1 2%	1 1%	3 3%	2 5%	0 0%	6 3% k

(continued)

Q.6b What is the single most important reason you say that?

(continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	307 100%	50 100% (A)	257 100% (B)	59 100% (C)	57 100% (D)	68 100% (E)	55 100% (F)	56 100% (G)	98 100% (H)	110 100% (I)	44 100% (J)	119 100% (K)	188 100% (L)
General convenience of downtown	6 2%	1 2%	5 2%	1 2%	1 2%	1 1%	3 5%	0 0%	2 2%	4 4%	0 0%	4 3%	2 1%
Current residence close to family/friends/ work	6 2%	0 0%	6 2%	0 0%	1 2%	0 0%	1 2%	4 7% ce	4 4% i	0 0%	1 2%	1 1%	5 3%
Other	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
None/nothing	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.6c (IF 1 OR 2 IN Q6A) How soon would you consider moving downtown if the right housing product was available at the right price?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
Within 1 year	16 35%	3 25%	13 38%	7 54%	2 29%	4 29%	2 29%	1 20%	10 56%	3 16%	2 33%	5 26%	11 41%
In 1 to 2 years	6 13%	1 8%	5 15%	2 15%	1 14%	2 14%	0 0%	1 20%	1 6%	3 16%	2 33%	2 11%	4 15%
In 2 - 3 years	7 15%	3 25%	4 12%	1 8%	2 29%	1 7%	1 14%	2 40%	4 22%	2 11%	0 0%	4 21%	3 11%
More than 3 years from now	17 37%	5 42%	12 35%	3 23%	2 29%	7 50%	4 57%	1 20%	3 17%	11 58%	2 33%	8 42%	9 33%

Q.7a I'm going to read a list of various types of housing that could possibly be offered in downtown Oklahoma City. On a scale of 1 to 5...how likely would you be to consider...

a. A townhouse

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Absolutely Not Consider)	14 30%	4 33%	10 29%	4 31%	3 43%	3 21%	3 43%	1 20%	5 28%	7 37%	1 17%	7 37%	7 26%
2	4 9%	0 0%	4 12%	1 8%	1 14%	2 14%	0 0%	0 0%	0 0%	3 16%	1 17%	2 11%	2 7%
3	12 26%	1 8%	11 32%	5 38%	2 29%	2 14%	1 14%	2 40%	7 39%	3 16%	1 17%	4 21%	8 30%
4	5 11%	1 8%	4 12%	1 8%	0 0%	2 14%	1 14%	1 20%	3 17%	0 0%	1 17%	3 16%	2 7%
5 (Would Definitely Consider)	11 24%	6 50%	5 15%	2 15%	1 14%	5 36%	2 29%	1 20%	3 17%	6 32%	2 33%	3 16%	8 30%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.7a I'm going to read a list of various types of housing that could possibly be offered in downtown Oklahoma City. On a scale of 1 to 5...how likely would you be to consider...

b. A loft in an historic building.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Absolutely Not Consider)	10 22%	4 33%	6 18%	5 38%	2 29%	0 0%	2 29%	1 20%	6 33%	4 21%	0 0%	5 26%	5 19%
2	6 13%	0 0%	6 18%	2 15%	1 14%	3 21%	0 0%	0 0%	2 11%	4 21%	0 0%	2 11%	4 15%
3	7 15%	1 8%	6 18%	1 8%	1 14%	2 14%	2 29%	1 20%	1 6%	4 21%	1 17%	4 21%	3 11%
4	6 13%	3 25%	3 9%	1 8%	2 29%	3 21%	0 0%	0 0%	0 0%	4 21%	1 17%	3 16%	3 11%
5 (Would Definitely Consider)	17 37%	4 33%	13 38%	4 31%	1 14%	6 43%	3 43%	3 60%	9 50%	3 16%	4 67%	5 26%	12 44%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.7a I'm going to read a list of various types of housing that could possibly be offered in downtown Oklahoma City. On a scale of 1 to 5...how likely would you be to consider...

c. A unit in a low-rise building with 1 to 3 floors.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Absolutely Not Consider)	19 41%	5 42%	14 41%	6 46%	4 57%	7 50%	2 29%	0 0%	9 50%	8 42%	1 17%	8 42%	11 41%
2	9 20%	1 8%	8 24%	4 31%	0 0%	2 14%	2 29%	1 20%	4 22%	3 16%	1 17%	5 26%	4 15%
3	8 17%	2 17%	6 18%	2 15%	2 29%	1 7%	0 0%	3 60%	2 11%	4 21%	1 17%	2 11%	6 22%
4	6 13%	2 17%	4 12%	1 8%	1 14%	1 7%	2 29%	1 20%	2 11%	2 11%	2 33%	2 11%	4 15%
5 (Would Definitely Consider)	4 9%	2 17%	2 6%	0 0%	0 0%	3 21%	1 14%	0 0%	1 6%	2 11%	1 17%	2 11%	2 7%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.7a I'm going to read a list of various types of housing that could possibly be offered in downtown Oklahoma City. On a scale of 1 to 5...how likely would you be to consider...

d. A unit in a mid-rise building with 4 to 8 floors.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Absolutely Not Consider)	19 41%	3 25%	16 47%	7 54%	4 57%	4 29%	3 43%	1 20%	12 67%	6 32%	0 0%	7 37%	12 44%
2	6 13%	1 8%	5 15%	1 8%	0 0%	2 14%	2 29%	1 20%	2 11%	2 11%	2 33%	1 5%	5 19%
3	9 20%	3 25%	6 18%	3 23%	1 14%	3 21%	0 0%	2 40%	0 0%	5 26%	2 33%	4 21%	5 19%
4	6 13%	1 8%	5 15%	1 8%	2 29%	0 0%	2 29%	1 20%	2 11%	3 16%	1 17%	4 21%	2 7%
5 (Would Definitely Consider)	6 13%	4 33%	2 6%	1 8%	0 0%	5 36%	0 0%	0 0%	2 11%	3 16%	1 17%	3 16%	3 11%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.7a I'm going to read a list of various types of housing that could possibly be offered in downtown Oklahoma City. On a scale of 1 to 5...how likely would you be to consider...

e. A unit in a high-rise building with 9 or more floors.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Absolutely Not Consider)	20 43%	3 25%	17 50%	7 54%	4 57%	3 21%	3 43%	3 60%	12 67%	6 32%	0 0%	8 42%	12 44%
2	6 13%	2 17%	4 12%	1 8%	0 0%	4 29%	1 14%	0 0%	0 0%	4 21%	1 17%	4 21%	2 7%
3	2 4%	1 8%	1 3%	1 8%	0 0%	0 0%	0 0%	1 20%	0 0%	2 11%	0 0%	1 5%	1 4%
4	8 17%	2 17%	6 18%	2 15%	1 14%	3 21%	2 29%	0 0%	2 11%	3 16%	3 50%	2 11%	6 22%
5 (Would Definitely Consider)	10 22%	4 33%	6 18%	2 15%	2 29%	4 29%	1 14%	1 20%	4 22%	4 21%	2 33%	4 21%	6 22%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.7a I'm going to read a list of various types of housing that could possibly be offered in downtown Oklahoma City. On a scale of 1 to 5...how likely would you be to consider...

f. A single-family home.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Absolutely Not Consider)	7 15%	4 33%	3 9%	1 8%	0 0%	3 21%	1 14%	2 40%	2 11%	3 16%	1 17%	5 26%	2 7%
2	6 13%	1 8%	5 15%	2 15%	0 0%	3 21%	1 14%	0 0%	2 11%	1 5%	2 33%	3 16%	3 11%
3	3 7%	0 0%	3 9%	3 23%	0 0%	0 0%	0 0%	0 0%	2 11%	1 5%	0 0%	1 5%	2 7%
4	11 24%	4 33%	7 21%	2 15%	2 29%	6 43%	1 14%	0 0%	3 17%	7 37%	1 17%	4 21%	7 26%
5 (Would Definitely Consider)	19 41%	3 25%	16 47%	5 38%	5 71%	2 14%	4 57%	3 60%	9 50%	7 37%	2 33%	6 32%	13 48%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.7b I'm going to read a list of various types of housing that could possibly be offered in downtown Oklahoma City. Which one of the possibilities I mentioned would be your first choice?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
A townhouse	6 13%	4 33%	2 6%	0 0%	0 0%	3 21%	1 14%	2 40%	1 6%	4 21%	1 17%	2 11%	4 15%
A loft in an historic building	13 28%	2 17%	11 32%	3 23%	0 0%	4 29%	3 43%	3 60%	7 39%	2 11%	2 33%	5 26%	8 30%
A unit in a low-rise building with 1 to 3 floors	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
A unit in a mid-rise building with 4 to 8 floors	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
A unit in a high-rise building with 9 or more floors	4 9%	1 8%	3 9%	1 8%	1 14%	2 14%	0 0%	0 0%	1 6%	2 11%	1 17%	1 5%	3 11%

A single family home	23 50%	5 42%	18 53%	9 69%	6 86%	5 36%	3 43%	0 0%	9 50%	11 58%	2 33%	11 58%	12 44%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.8 Would you prefer to live in a new, not new but renovated, or historic structure?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
New	11 24%	3 25%	8 24%	3 23%	3 43%	1 7%	3 43%	1 20%	3 17%	5 26%	3 50%	5 26%	6 22%
Not new but renovated	11 24%	2 17%	9 26%	3 23%	0 0%	3 21%	4 57%	1 20%	4 22%	4 21%	2 33%	6 32%	5 19%
Historic	19 41%	4 33%	15 44%	7 54%	4 57%	7 50%	0 0%	1 20%	10 56%	7 37%	0 0%	7 37%	12 44%
Don't know/no preference	5 11%	3 25%	2 6%	0 0%	0 0%	3 21%	0 0%	2 40%	1 6%	3 16%	1 17%	1 5%	4 15%

Q.9 Initially, would you prefer to won or rent your residence in downtown?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
Own	41 89%	11 92%	30 88%	11 85%	7 100%	13 93%	6 86%	4 80%	15 83%	18 95%	6 100%	17 89%	24 89%
Rent	5 11%	1 8%	4 12%	2 15%	0 0%	1 7%	1 14%	1 20%	3 17%	1 5%	0 0%	2 11%	3 11%

Q.10 About how much would you be willing to pay in the form of a mortgage or rent per month to live downtown?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
Less than $600	13 28%	2 17%	11 32%	4 31%	1 14%	4 29%	1 14%	3 60%	9 50%	2 11%	1 17%	4 21%	9 33%
$600 - $949	17 37%	4 33%	13 38%	8 62%	4 57%	3 21%	1 14%	1 20%	8 44%	8 42%	0 0%	9 47%	8 30%
$950 - $1,299	13 28%	5 42%	8 24%	1 8%	1 14%	6 43%	4 57%	1 20%	1 6%	7 37%	4 67%	5 26%	8 30%
$1,300 - $1,649	2 4%	0 0%	2 6%	0 0%	1 14%	0 0%	1 14%	0 0%	0 0%	2 11%	0 0%	1 5%	1 4%
$1,650 - $1,999	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
$2,000 or more	1 2%	1 8%	0 0%	0 0%	0 0%	1 7%	0 0%	0 0%	0 0%	0 0%	1 17%	0 0%	1 4%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.11 How many bedrooms and bathrooms would you want and expect to get at that cost?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 BR, 1 B	2 4%	0 0%	2 6%	1 8%	0 0%	0 0%	0 0%	1 20%	2 11%	0 0%	0 0%	1 5%	1 4%
2 BR, 1 B	3 7%	1 8%	2 6%	1 8%	0 0%	2 14%	0 0%	0 0%	3 17%	0 0%	0 0%	1 5%	2 7%
2 BR, 1.5 B	2 4%	0 0%	2 6%	0 0%	1 14%	0 0%	0 0%	1 20%	2 11%	0 0%	0 0%	0 0%	2 7%
2 BR, 2 B	12 26%	5 42%	7 21%	0 0%	1 14%	4 29%	4 57%	3 60%	4 22%	6 32%	0 0%	7 37%	5 19%
3 BR, 2 B	18 39%	4 33%	14 41%	6 46%	4 57%	6 43%	2 29%	0 0%	5 28%	10 53%	3 50%	9 47%	9 33%
3 BR, 2.5 B	1 2%	0 0%	1 3%	0 0%	0 0%	1 7%	0 0%	0 0%	0 0%	0 0%	1 17%	0 0%	1 4%
3 BR, 3 B	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
4 BR, 2 B	6 13%	1 8%	5 15%	5 38%	1 14%	0 0%	0 0%	0 0%	2 11%	3 16%	0 0%	1 5%	5 19%
Other	2 4%	1 8%	1 3%	0 0%	0 0%	1 7%	1 14%	0 0%	0 0%	0 0%	2 33%	0 0%	2 7%

Q.11b And how many parking spaces would you want and expect to get at that cost?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
None	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
One	8 17%	2 17%	6 18%	3 23%	1 14%	2 14%	1 14%	1 20%	4 22%	3 16%	0 0%	2 11%	6 22%
Two	32 70%	7 58%	25 74%	8 62%	5 71%	9 64%	6 86%	4 80%	11 61%	15 79%	5 83%	14 74%	18 67%
Three	5 11%	3 25%	2 6%	2 15%	1 14%	2 14%	0 0%	0 0%	2 11%	1 5%	1 17%	2 11%	3 11%
Four or more	1 2%	0 0%	1 3%	0 0%	0 0%	1 7%	0 0%	0 0%	1 6%	0 0%	0 0%	1 5%	0 0%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.11c And what type of parking?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
Open lot	4 9%	0 0%	4 12%	2 15%	1 14%	1 7%	0 0%	0 0%	2 11%	1 5%	1 17%	0 0%	4 15%
Carport	8 17%	2 17%	6 18%	2 15%	0 0%	3 21%	1 14%	2 40%	4 22%	3 16%	0 0%	3 16%	5 19%
Garage	32 70%	9 75%	23 68%	9 69%	6 86%	9 64%	6 86%	2 40%	12 67%	14 74%	4 67%	16 84%	16 59%
Don't know	2 4%	1 8%	1 3%	0 0%	0 0%	1 7%	0 0%	1 20%	0 0%	1 5%	1 17%	0 0%	2 7%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

a. Being able to walk to work.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	20 43%	6 50%	14 41%	5 38%	3 43%	6 43%	4 57%	2 40%	7 39%	10 53%	2 33%	9 47%	11 41%
2	3 7%	0 0%	3 9%	1 8%	1 14%	1 7%	0 0%	0 0%	2 11%	0 0%	1 17%	0 0%	3 11%
3	8 17%	2 17%	6 18%	2 15%	2 29%	3 21%	1 14%	0 0%	3 17%	4 21%	1 17%	3 16%	5 19%
4	2 4%	1 8%	1 3%	1 8%	0 0%	0 0%	0 0%	1 20%	0 0%	2 11%	0 0%	1 5%	1 4%
5 (High Importance)	11 24%	3 25%	8 24%	4 31%	1 14%	4 29%	2 29%	0 0%	5 28%	3 16%	2 33%	5 26%	6 22%
Don't know	2 4%	0 0%	2 6%	0 0%	0 0%	0 0%	0 0%	2 40%	1 6%	0 0%	0 0%	1 5%	1 4%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

b. Being able to park your car within the building or in a garage connected to the building.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	4 9%	0 0%	4 12%	1 8%	0 0%	1 7%	2 29%	0 0%	2 11%	1 5%	1 17%	2 11%	2 7%
2	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
3	4 9%	1 8%	3 9%	1 8%	0 0%	3 21%	0 0%	0 0%	1 6%	2 11%	0 0%	1 5%	3 11%
4	6 13%	2 17%	4 12%	0 0%	1 14%	1 7%	2 29%	2 40%	2 11%	2 11%	1 17%	5 26%	1 4%
5 (High Importance)	32 70%	9 75%	23 68%	11 85%	6 86%	9 64%	3 43%	3 60%	13 72%	14 74%	4 67%	11 58%	21 78%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

c. Being within walking distance of an elementary school.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	25 54%	8 67%	17 50%	3 23%	5 71%	8 57%	5 71%	4 80%	10 56%	11 58%	2 33%	11 58%	14 52%
2	3 7%	1 8%	2 6%	2 15%	0 0%	0 0%	0 0%	1 20%	2 11%	1 5%	0 0%	1 5%	2 7%
3	5 11%	0 0%	5 15%	2 15%	2 29%	1 7%	0 0%	0 0%	1 6%	2 11%	2 33%	1 5%	4 15%
4	2 4%	0 0%	2 6%	1 8%	0 0%	1 7%	0 0%	0 0%	2 11%	0 0%	0 0%	1 5%	1 4%
5 (High Importance)	11 24%	3 25%	8 24%	5 38%	0 0%	4 29%	2 29%	0 0%	3 17%	5 26%	2 33%	5 26%	6 22%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

d. Being near a park.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	6 13%	2 17%	4 12%	1 8%	0 0%	2 14%	2 29%	1 20%	3 17%	0 0%	2 33%	2 11%	4 15%
2	3 7%	1 8%	2 6%	1 8%	0 0%	1 7%	1 14%	0 0%	1 6%	1 5%	1 17%	2 11%	1 4%
3	16 35%	5 42%	11 32%	4 31%	3 43%	5 36%	1 14%	3 60%	6 33%	7 37%	2 33%	7 37%	9 33%
4	12 26%	0 0%	12 35%	3 23%	3 43%	3 21%	3 43%	0 0%	5 28%	7 37%	0 0%	5 26%	7 26%
5 (High Importance)	9 20%	4 33%	5 15%	4 31%	1 14%	3 21%	0 0%	1 20%	3 17%	4 21%	1 17%	3 16%	6 22%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

e. Being near a hike and bike trail.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	15 33%	5 42%	10 29%	4 31%	0 0%	5 36%	4 57%	2 40%	6 33%	5 26%	3 50%	5 26%	10 37%
2	5 11%	1 8%	4 12%	2 15%	2 29%	0 0%	1 14%	0 0%	3 17%	2 11%	0 0%	3 16%	2 7%
3	7 15%	2 17%	5 15%	2 15%	0 0%	2 14%	1 14%	2 40%	1 6%	4 21%	1 17%	3 16%	4 15%
4	9 20%	1 8%	8 24%	2 15%	3 43%	4 29%	0 0%	0 0%	4 22%	4 21%	1 17%	3 16%	6 22%
5 (High Importance)	10 22%	3 25%	7 21%	3 23%	2 29%	3 21%	1 14%	1 20%	4 22%	4 21%	1 17%	5 26%	5 19%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

f. Being close to other housing.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	6 13%	2 17%	4 12%	4 31%	0 0%	0 0%	2 29%	0 0%	3 17%	3 16%	0 0%	2 11%	4 15%
2	8 17%	2 17%	6 18%	1 8%	2 29%	3 21%	2 29%	0 0%	4 22%	3 16%	1 17%	2 11%	6 22%
3	14 30%	3 25%	11 32%	3 23%	1 14%	9 64%	0 0%	1 20%	5 28%	6 32%	2 33%	8 42%	6 22%
4	7 15%	2 17%	5 15%	1 8%	1 14%	0 0%	2 29%	3 60%	2 11%	4 21%	0 0%	3 16%	4 15%
5 (High Importance)	11 24%	3 25%	8 24%	4 31%	3 43%	2 14%	1 14%	1 20%	4 22%	3 16%	3 50%	4 21%	7 26%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

g. Being within walking distance of retail facilities.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	7 15%	4 33%	3 9%	2 15%	1 14%	2 14%	2 29%	0 0%	3 17%	2 11%	1 17%	4 21%	3 11%
2	6 13%	2 17%	4 12%	0 0%	1 14%	4 29%	1 14%	0 0%	1 6%	5 26%	0 0%	5 26%	1 4%
3	11 24%	2 17%	9 26%	3 23%	1 14%	4 29%	1 14%	2 40%	6 33%	4 21%	0 0%	4 21%	7 26%
4	11 24%	1 8%	10 29%	3 23%	3 43%	1 7%	3 43%	1 20%	3 17%	6 32%	2 33%	3 16%	8 30%
5 (High Importance)	11 24%	3 25%	8 24%	5 38%	1 14%	3 21%	0 0%	2 40%	5 28%	2 11%	3 50%	3 16%	8 30%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

h. Being within walking distance of entertainment and special events.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	4 9%	2 17%	2 6%	1 8%	0 0%	1 7%	1 14%	1 20%	3 17%	1 5%	0 0%	2 11%	2 7%
2	5 11%	1 8%	4 12%	2 15%	0 0%	1 7%	2 29%	0 0%	1 6%	3 16%	1 17%	2 11%	3 11%
3	18 39%	3 25%	15 44%	5 38%	5 71%	5 36%	0 0%	3 60%	8 44%	7 37%	2 33%	6 32%	12 44%
4	7 15%	2 17%	5 15%	1 8%	1 14%	3 21%	2 29%	0 0%	3 17%	3 16%	0 0%	3 16%	4 15%
5 (High Importance)	12 26%	4 33%	8 24%	4 31%	1 14%	4 29%	2 29%	1 20%	3 17%	5 26%	3 50%	6 32%	6 22%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

i. Having a church nearby.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	8 17%	0 0%	8 24%	5 38%	0 0%	0 0%	2 29%	1 20%	4 22%	1 5%	2 33%	3 16%	5 19%
2	8 17%	5 42%	3 9%	1 8%	2 29%	4 29%	1 14%	0 0%	3 17%	4 21%	0 0%	4 21%	4 15%
3	7 15%	1 8%	6 18%	1 8%	3 43%	0 0%	2 29%	1 20%	2 11%	4 21%	1 17%	4 21%	3 11%
4	10 22%	1 8%	9 26%	2 15%	2 29%	5 36%	0 0%	1 20%	6 33%	4 21%	0 0%	4 21%	6 22%
5 (High Importance)	13 28%	5 42%	8 24%	4 31%	0 0%	5 36%	2 29%	2 40%	3 17%	6 32%	3 50%	4 21%	9 33%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

j. Having restaurants nearby.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	5 11%	2 17%	3 9%	1 8%	0 0%	2 14%	1 14%	1 20%	3 17%	2 11%	0 0%	3 16%	2 7%
2	3 7%	1 8%	2 6%	0 0%	0 0%	2 14%	1 14%	0 0%	0 0%	2 11%	0 0%	3 16%	0 0%
3	10 22%	2 17%	8 24%	2 15%	3 43%	2 14%	1 14%	2 40%	5 28%	4 21%	1 17%	4 21%	6 22%
4	14 30%	2 17%	12 35%	4 31%	2 29%	4 29%	3 43%	1 20%	4 22%	6 32%	2 33%	5 26%	9 33%
5 (High Importance)	14 30%	5 42%	9 26%	6 46%	2 29%	4 29%	1 14%	1 20%	6 33%	5 26%	3 50%	4 21%	10 37%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

k. Having a health club nearby.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	9 20%	4 33%	5 15%	2 15%	0 0%	2 14%	3 43%	2 40%	5 28%	3 16%	1 17%	3 16%	6 22%
2	7 15%	3 25%	4 12%	1 8%	3 43%	2 14%	1 14%	0 0%	1 6%	4 21%	1 17%	5 26%	2 7%
3	15 33%	2 17%	13 38%	3 23%	4 57%	4 29%	2 29%	2 40%	6 33%	6 32%	1 17%	7 37%	8 30%
4	8 17%	2 17%	6 18%	2 15%	0 0%	4 29%	1 14%	1 20%	2 11%	5 26%	1 17%	3 16%	5 19%
5 (High Importance)	7 15%	1 8%	6 18%	5 38%	0 0%	2 14%	0 0%	0 0%	4 22%	1 5%	2 33%	1 5%	6 22%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.12 Now I'm going to read a list of factors that one might consider in selecting one location over another in downtown Oklahoma City. On a scale from 1 to 5...please tell me how important each factor is to you.

l. Having a public transit nearby.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
1 (Low Importance)	17 37%	4 33%	13 38%	7 54%	2 29%	5 36%	2 29%	1 20%	7 39%	7 37%	2 33%	7 37%	10 37%
2	8 17%	1 8%	7 21%	0 0%	3 43%	3 21%	2 29%	0 0%	3 17%	4 21%	1 17%	5 26%	3 11%
3	7 15%	2 17%	5 15%	4 31%	0 0%	1 7%	1 14%	1 20%	3 17%	2 11%	1 17%	2 11%	5 19%
4	5 11%	2 17%	3 9%	1 8%	0 0%	3 21%	1 14%	0 0%	2 11%	2 11%	1 17%	2 11%	3 11%
5 (High Importance)	9 20%	3 25%	6 18%	1 8%	2 29%	2 14%	1 14%	3 60%	3 17%	4 21%	1 17%	3 16%	6 22%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.13 If you had your choice of several different areas of downtown in which to live, which one of the following would be your...

a. First Choice.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
Arts District	8 17%	2 17%	6 18%	4 31%	2 29%	1 7%	0 0%	1 20%	4 22%	3 16%	1 17%	1 5%	7 26%
Automobile Alley (Broadway)	4 9%	2 17%	2 6%	1 8%	0 0%	2 14%	0 0%	1 20%	3 17%	0 0%	1 17%	1 5%	3 11%
Business District	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%
Bricktown	14 30%	4 33%	10 29%	3 23%	2 29%	4 29%	4 57%	1 20%	4 22%	6 32%	2 33%	7 37%	7 26%

(continued)

Q.13 If you had your choice of several different areas of downtown in which to live, which one of the following would be your...

a. First Choice.

(continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	46 100%	12 100% (A)	34 100% (B)	13 100% (C)	7 100% (D)	14 100% (E)	7 100% (F)	5 100% (G)	18 100% (H)	19 100% (I)	6 100% (J)	19 100% (K)	27 100% (L)
Deep Deuce	5 11%	1 8%	4 12%	0 0%	2 29%	3 21%	0 0%	0 0%	1 6%	2 11%	2 33%	0 0%	5 19%
Flatiron District (between downtown and the Health Science Center)	3 7%	0 0%	3 9%	3 23%	0 0%	0 0%	0 0%	0 0%	2 11%	0 0%	0 0%	1 5%	2 7%
Midtown/St. Anthony area	6 13%	1 8%	5 15%	2 15%	1 14%	1 7%	1 14%	1 20%	3 17%	3 16%	0 0%	6 32%	0 0%
Don't know	6 13%	2 17%	4 12%	0 0%	0 0%	3 21%	2 29%	1 20%	1 6%	5 26%	0 0%	3 16%	3 11%

Q.13 If you had your choice of several different areas of downtown in which to live, which one of the following would be your...

b. Second Choice.

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	40 100%	10 100% (A)	30 100% (B)	13 100% (C)	7 100% (D)	11 100% (E)	5 100% (F)	4 100% (G)	17 100% (H)	14 100% (I)	6 100% (J)	16 100% (K)	24 100% (L)
Arts District	6 15%	2 20%	4 13%	1 8%	0 0%	4 36%	0 0%	1 25%	4 24%	1 7%	1 17%	2 13%	4 17%
Automobile Alley (Broadway)	10 25%	2 20%	8 27%	2 15%	0 0%	2 18%	4 80%	2 50%	2 12%	6 43%	1 17%	5 31%	5 21%
Business District	1 3%	0 0%	1 3%	1 8%	0 0%	0 0%	0 0%	0 0%	1 6%	0 0%	0 0%	1 6%	0 0%
Bricktown	8 20%	1 10%	7 23%	4 31%	2 29%	1 9%	0 0%	1 25%	3 18%	3 21%	1 17%	2 13%	6 25%

(continued)

Q.13 If you had your choice of several different areas of downtown in which to live, which one of the following would be your...

b. Second Choice.

(continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	40 100%	10 100% (A)	30 100% (B)	13 100% (C)	7 100% (D)	11 100% (E)	5 100% (F)	4 100% (G)	17 100% (H)	14 100% (I)	6 100% (J)	16 100% (K)	24 100% (L)
Deep Deuce	6 15%	3 30%	3 10%	1 8%	3 43%	2 18%	0 0%	0 0%	1 6%	3 21%	1 17%	3 19%	3 13%
Flatiron District (between downtown and the Health Science Center)	2 5%	0 0%	2 7%	0 0%	1 14%	0 0%	1 20%	0 0%	2 12%	0 0%	0 0%	1 6%	1 4%
Midtown/St. Anthony area	7 18%	2 20%	5 17%	4 31%	1 14%	2 18%	0 0%	0 0%	4 24%	1 7%	2 33%	2 13%	5 21%
Don't know	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

Q.14 Including yourself, how many people live in your household?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
One	53 15%	7 13%	46 16%	4 6%	2 3%	13 17% cD	8 12%	21 34% CDeF	31 26% IJ	13 11% j	1 2%	16 12%	37 17%
Two	144 41%	22 40%	122 41%	16 24%	15 23%	25 32%	45 67% CDE	37 60% CDE	44 38%	55 46%	19 37%	59 44%	85 40%
Three	55 16%	7 13%	48 16%	20 30% dfG	9 14% g	14 18% G	10 15% g	2 3%	16 14%	16 13%	9 17%	22 16%	33 15%
Four	59 17%	12 22%	47 16%	17 26% FG	22 34% FG	17 22% FG	2 3%	1 2%	17 15%	19 16%	16 31% hi	24 18%	35 16%
Five or more	34 10%	6 11%	28 9%	9 14% FG	16 25% eFG	8 10% fG	1 1%	0 0%	9 8%	17 14%	7 13%	12 9%	22 10%
Refused	5 1%	1 2%	4 1%	0 0%	0 0%	1 1%	1 1%	1 2%	0 0%	0 0%	0 0%	2 1%	3 1%

Q.15 How many children under 18 years of age live in your household?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
None	236 67%	32 58%	204 69%	26 39%	20 31%	51 65% CD	66 99% CDE	62 100% CDE	81 69%	76 63%	28 54%	93 69%	143 67%
One	36 10%	10 18% b	26 9%	14 21% FG	10 16% FG	12 15% FG	0 0%	0 0%	13 11%	13 11%	9 17%	14 10%	22 10%
Two	51 15%	9 16%	42 14%	18 27% eFG	21 33% EFG	11 14% FG	1 1%	0 0%	16 14%	20 17%	9 17%	16 12%	35 16%
Three	20 6%	3 5%	17 6%	6 9% fg	10 16% eFG	4 5%	0 0%	0 0%	6 5%	9 8%	5 10%	11 8%	9 4%
Four or more	5 1%	0 0%	5 2%	2 3%	3 5%	0 0%	0 0%	0 0%	1 1%	2 2%	1 2%	0 0%	5 2%
Refused	2 1%	1 2%	1 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	1 1%	1 0%

Q.16 What was the last year of formal education you completed?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Less than high school graduate	8 2%	1 2%	7 2%	0 0%	3 5%	2 3%	1 1%	2 3%	2 2%	3 3%	1 2%	2 1%	6 3%
High school graduate	65 19%	8 15%	57 19%	10 15%	11 17%	13 17%	13 19%	14 23%	31 26% ij	17 14%	5 10%	21 16%	44 20%
Some college, or business or tech school	109 31%	18 33%	91 31%	27 41% D	12 19%	25 32%	23 34% d	20 32%	42 36% j	38 32%	9 17%	39 29%	70 33%
Business or tech school graduate	12 3%	1 2%	11 4%	5 8% g	4 6% g	2 3%	1 1%	0 0%	6 5%	3 3%	1 2%	5 4%	7 3%
Four year college degree	82 23%	14 25%	68 23%	15 23%	21 33%	15 19%	15 22%	13 21%	24 21%	29 24%	14 27%	32 24%	50 23%
Post-graduate degree	72 21%	13 24%	59 20%	9 14%	13 20%	21 27%	13 19%	13 21%	12 10%	30 25% H	22 42% Hi	36 27% l	36 17%
Refused	2 1%	0 0%	2 1%	0 0%	0 0%	0 0%	1 1%	0 0%	0 0%	0 0%	0 0%	0 0%	2 1%

Q.17 What is your current employment status?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Employed	215 61%	46 84% B	169 57%	52 79% FG	52 81% FG	65 83% FG	34 51% G	9 15%	63 54%	85 71% H	41 79% H	91 67%	124 58%
Unemployed	21 6%	2 4%	19 6%	9 14% eG	4 6% g	3 4%	5 7% g	0 0%	10 9%	7 6%	2 4%	8 6%	13 6%
In the armed forces	1 0%	0 0%	1 0%	1 2%	0 0%	0 0%	0 0%	0 0%	1 1%	0 0%	0 0%	0 0%	1 0%
Not in the labor force or retired	110 31%	7 13%	103 35% A	4 6%	7 11%	10 13%	27 40% CDE	53 85% CDEF	42 36% iJ	28 23%	8 15%	36 27%	74 34%
Refused	3 1%	0 0%	3 1%	0 0%	1 2%	0 0%	1 1%	0 0%	1 1%	0 0%	1 2%	0 0%	3 1%

Q.18 (IF EMPLOYED) What industry are you employed in?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	215 100%	46 100% (A)	169 100% (B)	52 100% (C)	52 100% (D)	65 100% (E)	34 100% (F)	9 100% (G)	63 100% (H)	85 100% (I)	41 100% (J)	91 100% (K)	124 100% (L)
Energy	13 6%	5 11%	8 5%	4 8%	1 2%	4 6%	4 12%	0 0%	3 5%	6 7%	4 10%	9 10% l	4 3%
Manufacturing	12 6%	2 4%	10 6%	3 6%	3 6%	2 3%	3 9%	1 11%	3 5%	3 4%	3 7%	10 11% L	2 2%
Medical services	38 18%	5 11%	33 20%	10 19%	10 19%	14 22%	3 9%	0 0%	11 17%	14 16%	10 24%	10 11%	28 23% k
Legal services	7 3%	3 7%	4 2%	0 0%	1 2%	4 6%	1 3%	0 0%	2 3%	3 4%	1 2%	5 5%	2 2%
Government (including school districts)	46 21%	11 24%	35 21%	9 17%	10 19%	19 29%	7 21%	1 11%	10 16%	28 33% hJ	4 10%	19 21%	27 22%
Wholesale or retail trade	21 10%	5 11%	16 9%	7 13%	6 12%	4 6%	2 6%	2 22%	8 13%	6 7%	3 7%	8 9%	13 10%
Transportation	7 3%	1 2%	6 4%	2 4%	1 2%	2 3%	0 0%	2 22%	1 2%	1 1%	4 10% i	4 4%	3 2%

(continued)

Q.18 (IF EMPLOYED) What industry are you employed in?

(continued)

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	215 100%	46 100% (A)	169 100% (B)	52 100% (C)	52 100% (D)	65 100% (E)	34 100% (F)	9 100% (G)	63 100% (H)	85 100% (I)	41 100% (J)	91 100% (K)	124 100% (L)
Business services	49 23%	10 22%	39 23%	10 19%	13 25%	12 18%	10 29%	3 33%	15 24%	16 19%	11 27%	19 21%	30 24%
Other	20 9%	4 9%	16 9%	6 12%	7 13%	3 5%	4 12%	0 0%	8 13%	8 9%	1 2%	5 5%	15 12%
Refused	2 1%	0 0%	2 1%	1 2%	0 0%	1 2%	0 0%	0 0%	2 3%	0 0%	0 0%	2 2%	0 0%

Q.19 What is your age?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Under 25	16 5%	2 4%	14 5%	16 24% DEFG	0 0%	0 0%	0 0%	0 0%	14 12% Ij	1 1%	1 2%	9 7%	7 3%
25 to 34	50 14%	8 15%	42 14%	50 76% DEFG	0 0%	0 0%	0 0%	0 0%	22 19%	19 16%	5 10%	14 10%	36 17%
35 to 44	64 18%	8 15%	56 19%	0 0%	64 100% CEFG	0 0%	0 0%	0 0%	14 12%	30 25% H	15 29% H	22 16%	42 20%
45 to 54	78 22%	20 36% B	58 20%	0 0%	0 0%	78 100% CDFG	0 0%	0 0%	18 15%	28 23%	19 37% H	31 23%	47 22%
55 to 64	67 19%	12 22%	55 19%	0 0%	0 0%	0 0%	67 100% CDEG	0 0%	15 13%	28 23% h	8 15%	34 25% l	33 15%
65 to 74	37 11%	4 7%	33 11%	0 0%	0 0%	0 0%	0 0%	37 60% CDEF	16 14%	10 8%	4 8%	15 11%	22 10%
75 or older	25 7%	0 0%	25 8% a	0 0%	0 0%	0 0%	0 0%	25 40% CDEF	15 13% IJ	4 3%	0 0%	7 5%	18 8%
Refused	13 4%	1 2%	12 4%	0 0%	0 0%	0 0%	0 0%	0 0%	3 3%	0 0%	0 0%	3 2%	10 5%

Q.21 Which one of the following ethnic classifications best describes you?

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
White	310 89%	47 85%	263 89%	54 82%	56 88%	67 86%	64 96% c	59 95% c	101 86%	108 90%	48 92%	122 90%	188 87%
Hispanic or Latino	3 1%	1 2%	2 1%	0 0%	1 2%	2 3%	0 0%	0 0%	0 0%	1 1%	0 0%	0 0%	3 1%
African-American	13 4%	2 4%	11 4%	4 6%	4 6%	3 4%	1 1%	1 2%	8 7%	4 3%	1 2%	5 4%	8 4%
Asian	3 1%	1 2%	2 1%	2 3%	1 2%	0 0%	0 0%	0 0%	0 0%	3 3%	0 0%	2 1%	1 0%
Native American	15 4%	4 7%	11 4%	5 8%	1 2%	4 5%	2 3%	2 3%	8 7%	4 3%	1 2%	5 4%	10 5%
Other	1 0%	0 0%	1 0%	1 2%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%	1 2%	0 0%	1 0%
Refused	5 1%	0 0%	5 2%	0 0%	1 2%	2 3%	0 0%	0 0%	0 0%	0 0%	1 2%	1 1%	4 2%

Q.22 Is your annual household income, the combined income of yourself and other people living in your household...

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe-male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Less than $35,000	52 15%	5 9%	47 16%	14 21% ef	6 9%	7 9%	6 9%	17 27% DEF	52 44% IJ	0 0%	0 0%	14 10%	38 18%
$35,000 - $50,000	65 19%	9 16%	56 19%	22 33% DEF	8 13%	11 14%	9 13%	14 23%	65 56% IJ	0 0%	0 0%	27 20%	38 18%
$50,000 - $75,000	73 21%	15 27%	58 20%	10 15%	19 30% ce	11 14%	23 34% cEg	10 16%	0 0%	73 61% HJ	0 0%	29 21%	44 20%
$75,000 - $100,000	47 13%	12 22% b	35 12%	10 15%	11 17%	17 22% fg	5 7%	4 6%	0 0%	47 39% HJ	0 0%	19 14%	28 13%
$100,000 - $150,000	26 7%	7 13%	19 6%	3 5%	8 13%	8 10%	4 6%	3 5%	0 0%	0 0%	26 50% HI	11 8%	15 7%
Over $150,000	26 7%	2 4%	24 8%	3 5%	7 11% g	11 14% G	4 6%	1 2%	0 0%	0 0%	26 50% HI	12 9%	14 7%
Refused	61 17%	5 9%	56 19%	4 6%	5 8%	13 17% c	16 24% Cd	13 21% cd	0 0%	0 0%	0 0%	23 17%	38 18%

Q.23 Gender

		Work Downtown		Age Group					Income Group			Gender	
	Total	Yes	No	Under 35	35-44	45-54	55-64	65+	<$50 K	$50K - $100 K	$100 K plus	Male	Fe- male
Base	350 100%	55 100% (A)	295 100% (B)	66 100% (C)	64 100% (D)	78 100% (E)	67 100% (F)	62 100% (G)	117 100% (H)	120 100% (I)	52 100% (J)	135 100% (K)	215 100% (L)
Male	135 39%	22 40%	113 38%	23 35%	22 34%	31 40%	34 51%	22 35%	41 35%	48 40%	23 44%	135 100% L	0 0%
Female	215 61%	33 60%	182 62%	43 65%	42 66%	47 60%	33 49%	40 65%	76 65%	72 60%	29 56%	0 0%	215 100% K

June 2005