



**HOUSING CHOICE AND AFFORDABILITY
ON LONG ISLAND & BEYOND:
A SURVEY OF SUBURBAN NY METRO AREA RESIDENTS**

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**Report Prepared by
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INTRODUCTION

Since 2002, the Rauch Foundation, a Long Island-based family foundation focused on children and families, the environment, and leadership, has commissioned a series of public opinion surveys to assess the attitudes of Long Island's residents on the important issues facing them. As part of the Foundation's *Long Island Index* project, these surveys are intended to provide an awareness of the concerns and opinions of Long Island residents.

The current Long Island Index poll focuses on Long Island residents' ongoing concerns about local life with a special focus on the local housing supply and its affordability. Topics covered in the survey include local property taxes, the desire to move from Long Island to less expensive areas of the country, concerns about young people leaving, and the range and cost of current housing options. At one level, Long Islanders report a continued recovery and improvement in local life following the 2008 recession: a majority report that things in their county are moving in the right direction, and the number who report that property taxes are too high, or view the lack of affordable housing and young people or members of their immediate family moving away as a very or extremely serious problem declined slightly compared to 2014.

But housing costs and options remain a real problem on Long Island. When it comes to housing, there has been a slight increase over 2014 in the number of Long Island residents who have difficulty meeting their monthly housing costs and a majority still say they are likely to leave Long Island and move to an area with cheaper housing costs within the next five years. These problems are brought into stark relief when residents of Long Island are compared to those of other local suburban residents living in New Jersey or the northern New York and Connecticut suburbs. A greater number of Long Island than NY/CT or NJ residents complain of high property taxes, a lack of affordable housing, young people moving away, and have greater difficulty paying their monthly rent or mortgage.

The survey documents a desire for more diverse housing options on Long Island, including a greater number of condos, townhouses, and apartments. This is hardly surprising when fully 35% of Long Island adults aged between 18 and 34 in the current survey reported living with their parents or a relative. The real question is whether or not housing options on Long Island can keep pace with this demand. Multi-family housing complexes provide a more affordable way to enter the housing market. At present there are many fewer multi-family housing complexes on Long Island than in surrounding areas and, as documented in the current *Long Island Index Report*, too few may be in the works to accommodate local demand.

The current survey was conducted by Princeton Survey Research Associates (PSRA) during the fall of 2015. Telephone interviews were conducted by cell phone and landline with a randomly selected sample of 1,052 Long Island residents (which included an oversample of young residents aged 18-34). In addition, a randomly selected sample of 255 adults was obtained from suburban counties in the northern New York and Connecticut suburbs and 254 from suburban New Jersey. Further information on the methodology, as well as the questionnaire and responses, is available in the Appendix to the report.

EXECUTIVE SUMMARY

Long Island is an expensive place to live. On the surface, this would seem to be true of the entire NY metro suburban area. But that is not how it seems to Long Island residents who report somewhat greater difficulty than residents of the other two suburban NY metro areas in meeting their housing costs. They are also more concerned about the flight of young people and family members. They complain to a greater degree about high property taxes. And they are more concerned about a lack of affordable housing on Long Island.

Long Island has become a more expensive place to live over time. The number of Long Islanders who report that it is difficult to meet their monthly housing costs has increased steadily since the Long Island Index first started tracking this question in 2004. It is also a more expensive place to live for renters than homeowners and for residents of low-income than affluent households. The high cost of life on Long Island is coupled with a decline in the quality of local jobs, as documented over time by the Long Island Index.

The high cost of life on Long Island continues to fuel a desire to leave. This intention is most pronounced among those aged 18 to 34 and their parents' age group (50-64). Residents of all three suburban NY metro areas say they plan to leave but this seems more jarring on Long Island where residents report a far stronger local identity, rate Long Island more positively as a place to live, and believe their area has a stronger sense of community. Thus, even though equal numbers of residents in all three regions think they might move in the next five years this entails a greater loss for Long Island residents who are very attached to Long Island as a place to live.

Long Island is dominated by single family homes to a greater degree than either of the other two suburban areas, contributing to its high housing costs. Multi-family housing options such as apartments, townhouses, and condos, can be less costly than a single-family home to rent or buy. And these options are more plentiful in the NJ and NY/CT suburbs as documented by residents interviewed in the current survey. The shortage of more affordable housing options on Long Island is most acute for low income residents of whom almost 10% live in a room or apartment within a single-family home.

When Long Islanders look ahead, however, they expect something different than the current housing supply. Five years from now, many fewer Long Island residents expect to live in a single family home and many more expect to live in a condo, townhouse or apartment. Indeed, if residents were able to follow their preferences, Long Island would look like current suburban areas in NJ and the northern NY/CT suburbs five years from now. There would be a sharp increase in the number of apartments, condos, and townhouses resulting in a shift from 15% who currently live in this type of housing to roughly double this number (29%) in 2020. This desire for many more multi-family housing developments on Long Island represents a singular challenge to local governments, planners, and developers.

Residents of all three regions also support other options that would make local housing more affordable. A majority support a change in zoning laws that would make it easier to install a rental apartment in a single-family home and an increase in residential units in local downtowns.

HOUSING AFFORDABILITY

Difficulty Paying Housing Costs

Long Island residents report somewhat greater difficulty than residents of the other NY suburban metro areas in paying their monthly rent or mortgage. This difference is most stark in comparison to residents of the NJ suburbs: 62% of Long Island residents say that it is somewhat or very difficult to pay the rent compared to 52% of NJ and 58% of NY/CT residents. Over the last 10 years, the number of Long Islanders who say it is difficult to meet their monthly housing costs has risen steadily from 47% in 2004 to the current all-time high of 62% in 2015.

Figure 1: In an average month, how difficult is it for you and your family living with you to pay the rent or mortgage (Q6)?

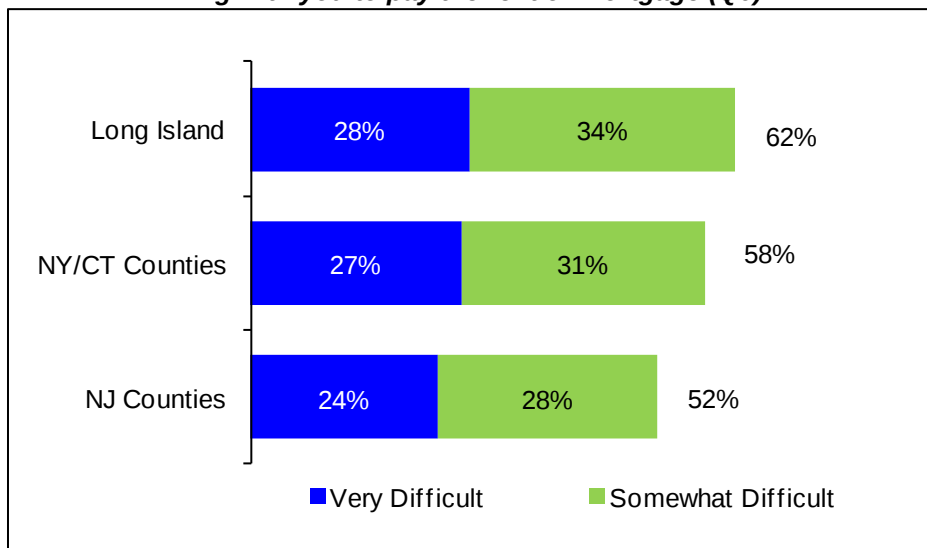
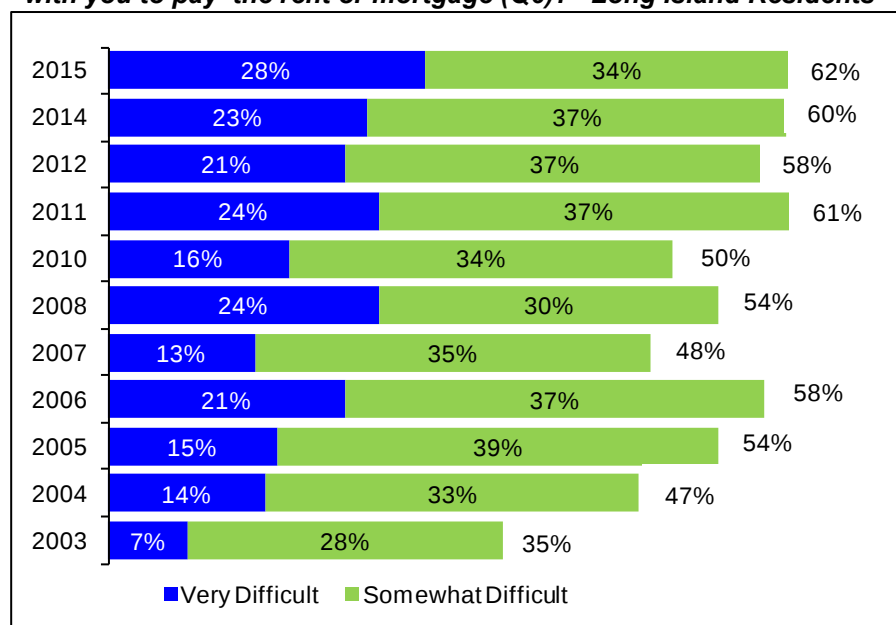
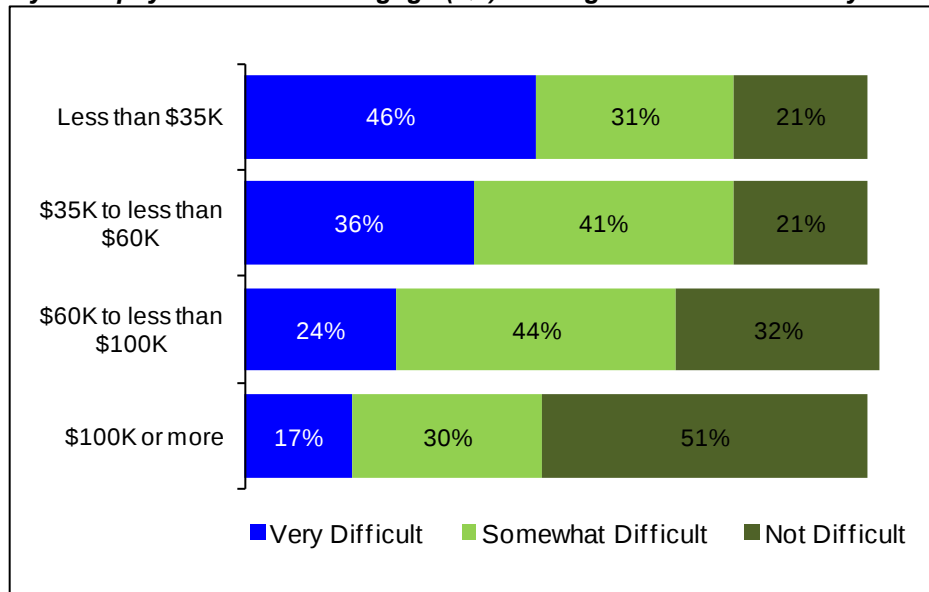


Figure 2: In an average month, how difficult is it for you and your family living with you to pay the rent or mortgage (Q6)? "Long Island Residents"



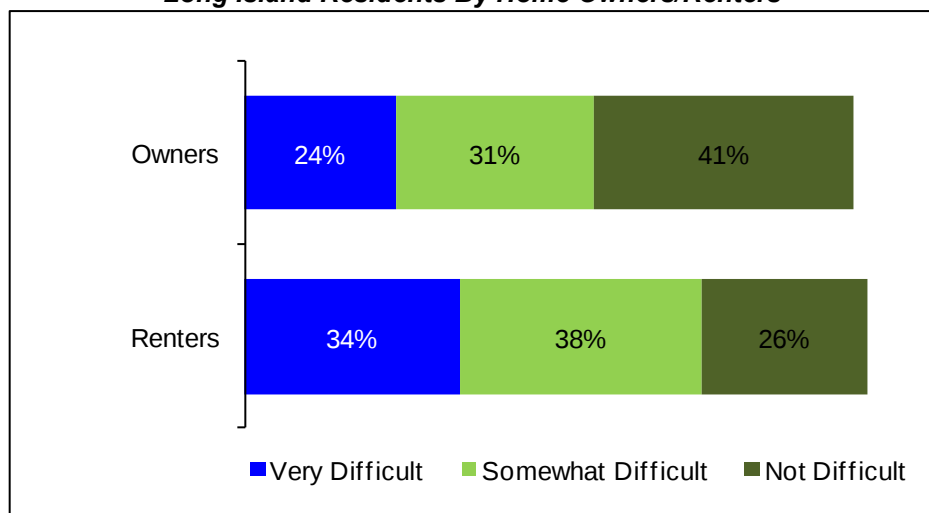
Difficulty in paying housing costs is directly related to Long Island residents' household income. 46% of residents in households with an annual income of \$35,000 or less report that it is very difficult to pay their rent or mortgage compared to 17% of those with a household income of \$100,000 or more.

Figure 3: In an average month, how difficult is it for you and your family living with you to pay the rent or mortgage (Q6)? "Long Island Residents By Income"



Renters (72%) have greater difficulty than homeowners (55%) in paying their monthly housing costs.

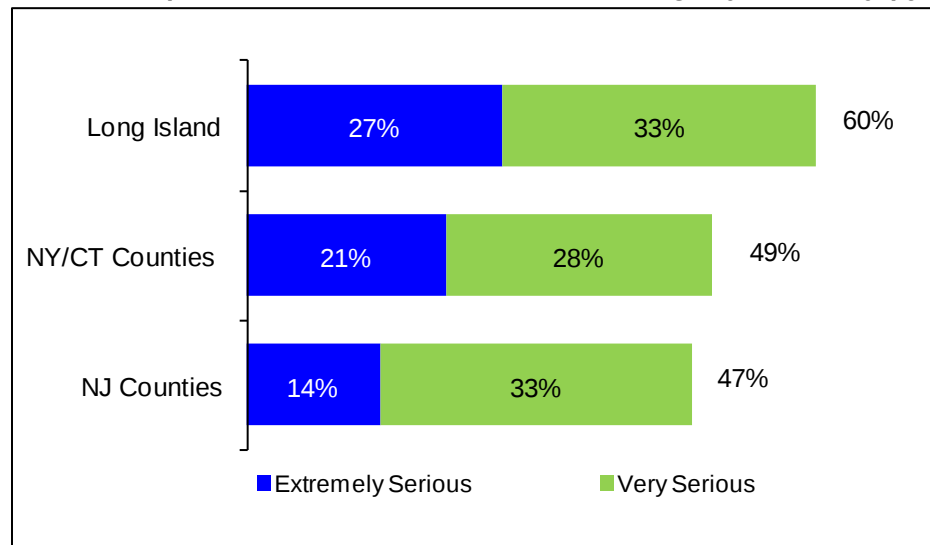
Figure 4: In an average month, how difficult is it for you and your family living with you to pay the rent or mortgage (Q6)? "Long Island Residents By Home Owners/Renters"



Lack of Affordable Housing

Long Island residents view a lack of affordable housing as a more serious problem than residents of the other two suburban NY metro areas (New Jersey and northern NY and CT). 60% of Long Island residents said it was a very or extremely serious problem compared to 49% of those in the NY/CT northern suburbs and 47% of residents of the NJ suburbs. This perception was widely shared across age groups, income level, education, and among homeowners and renters.

Figure 5: How serious a problem is the lack of affordable housing in your county (Q4)?



Young People Leaving

There are regional differences in concerns about the flight of young people who move to areas with more affordable housing. Long Island residents regard this as a more serious problem than do residents of the other two areas. The differences are striking: 72% of Long Islanders rate young people leaving as a very or extremely serious problem compared to 44% of NJ residents and 50% of residents in the NY/CT northern suburbs.

On Long Island, concerns about young people leaving are shared widely among people of different education, income levels, and other backgrounds. The one exception is young people who are somewhat less concerned about this than older residents. Among those aged 18-34, 61% considered young people leaving a very or extremely serious problem compared to 76% of those aged 35-49, 74% of those aged 50-64, and 78% of those aged 65 and older. Nonetheless, people of all ages express greater concern on Long Island than in the other two NY metro areas.

There is also substantially greater concern among residents of Long Island than other areas about family members being forced out because of high housing costs: 48% of Long Island residents are very concerned about this compared to 38% of residents in the two other NY metro regions. This concern is linked to length of residence on Long Island. Among those who have lived on Long Island for less than 10 years, 36% years say they are very concerned compared to 52% of those who have lived on Long Island for more than 10 years, and 47% of those who lived on Long Island for their entire life.

Figure 6: How serious is the problem of young people moving away from your county because of the high cost of living (Q5)?

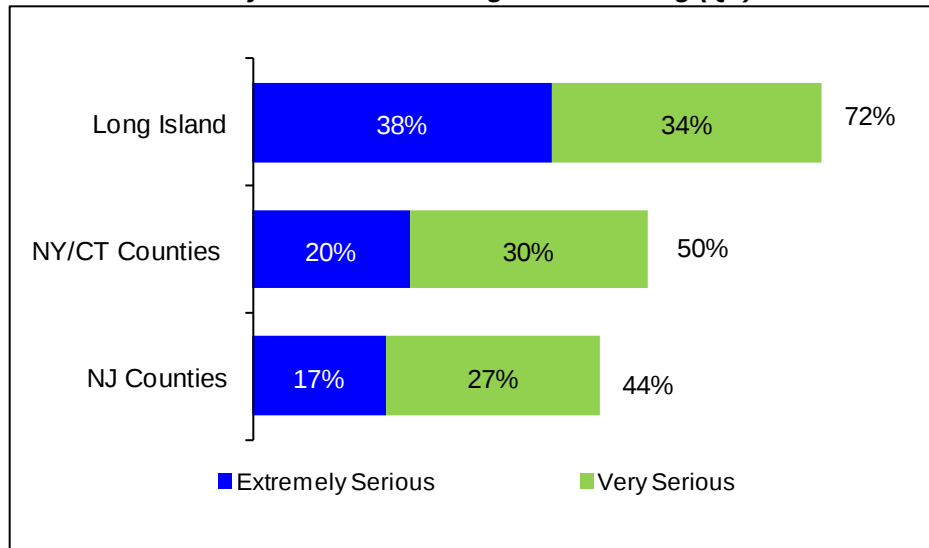
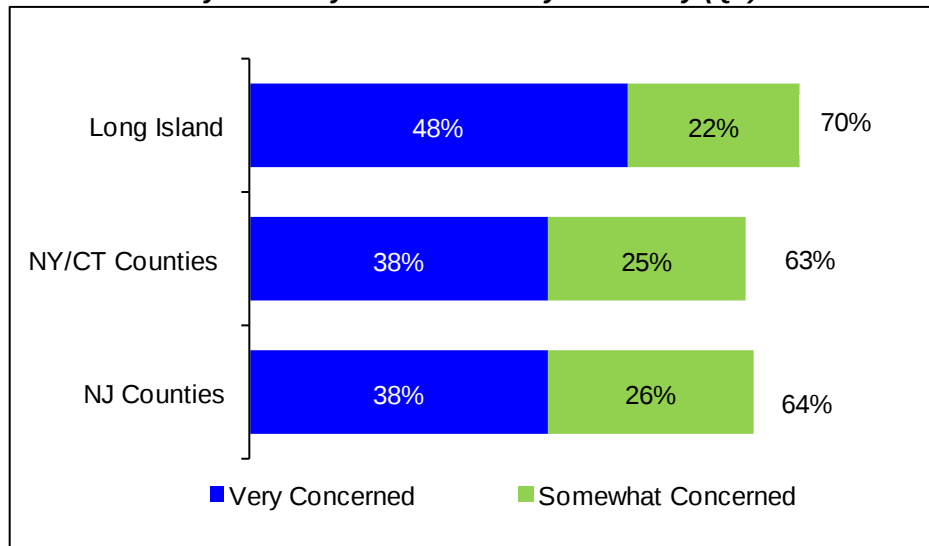


Figure 7: How concerned are you that the high cost of housing will force members of your family to move out of your county (Q7)?



High Property Taxes

All residents of the NY metro suburban area view high property taxes as a very or extremely serious problem but these numbers are greater among Long Island (71%) than NY/CT (63%) or NJ (60%) residents. In addition, 37% of Long Island residents rate taxes as the most serious problem facing their county compared to 20% of NJ and 25% of NY/CT suburban residents in the NY metro area.

Figure 8: In your view, how serious a problem are high property taxes in your county?(Q3)

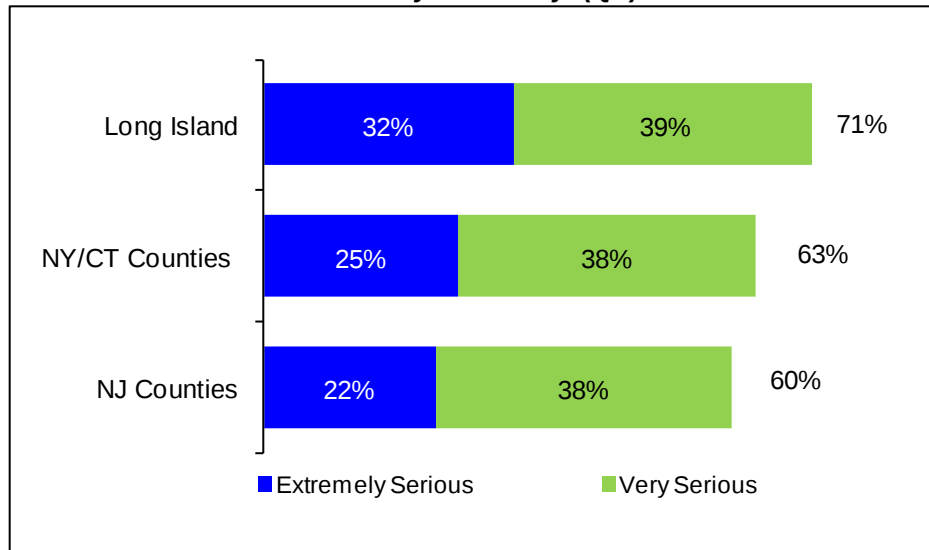
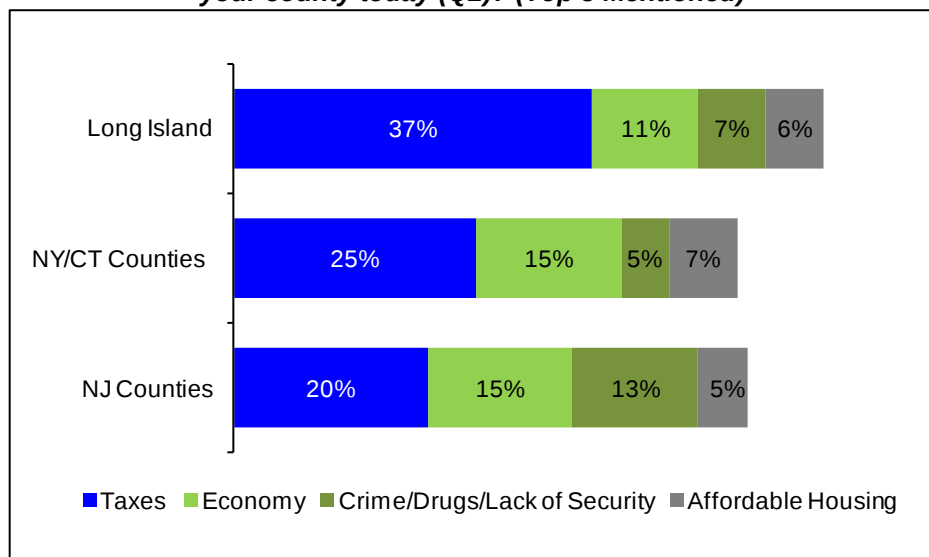


Figure 9: Overall, what do you think is the MOST important problem facing residents of your county today (Q2)? (Top 5 Mentioned)



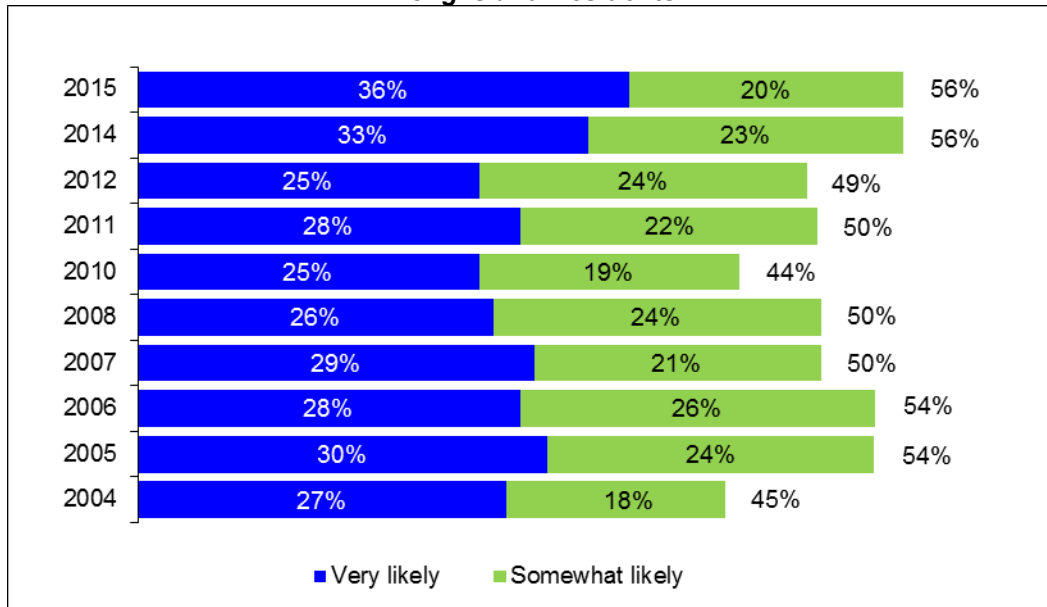
On Long Island, home owners (51%) are far more likely than renters (19%) to cite high property taxes as the most important local problem. And more renters (9%) than home owners (3%) mention a lack of affordable housing as the most important local problem. Wealthier, older, and politically conservative Long Island residents are also likely to name taxes as the most serious local problem.

LEAVING FOR A MORE AFFORDABLE AREA

Likely to leave

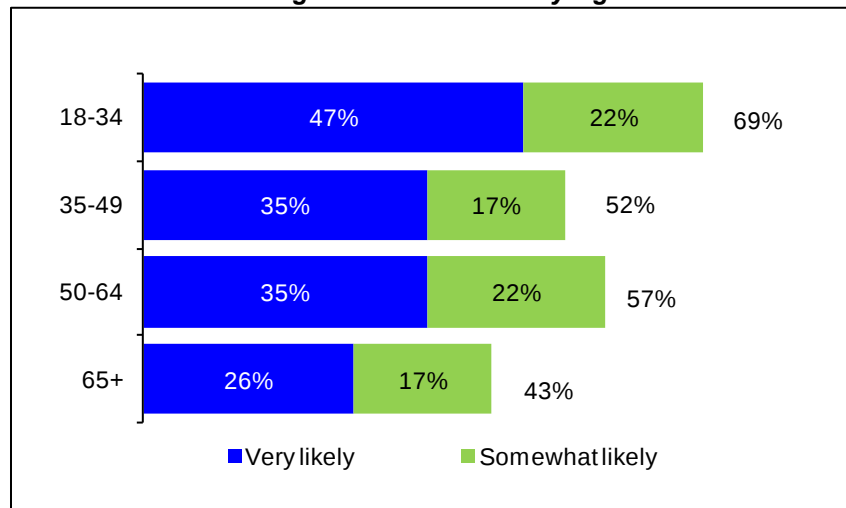
Roughly equal numbers of residents in the three regions (56% on LI, 57% in northern suburbs, and 59% in NJ) say that they are likely to leave their county in the next five years for one with lower housing costs. On Long Island, 56% of residents also said this in 2014 and in both years this represents the greatest percentage saying this in the poll since it began in 2004.

**Figure 10: How likely is that you will move out of your county to an area with lower housing costs and property taxes in the next 5 years (Q8)?
“Long Island Residents”**



As in previous polls, young residents aged 18-34 (69%) are most likely to say they are somewhat or very likely to leave Long Island in the next five years followed by their parents' generation, residents aged 50-64 (57%).

**Figure 11: How likely is that you will move out of your county to an area with lower housing costs and property taxes in the next 5 years (Q8)?
“Long Island Residents by Age”**



Sense of Community

The intention to leave Long Island has more serious consequences than leaving other areas because of the strong sense of community among Long Island residents. 37% of Long Islanders rate Long Island as an excellent place to live compared to 29% of NY/CT residents and 21% of NJ residents. 59% of Long Island residents identify very strongly with Long Island compared to 32% of NY/CT and 28% of NJ

residents who identify very strongly with their county. In addition, 78% of Long Island residents but only 67% of NY/CT and 60% of NJ residents say their county has a strong sense of community.

Figure 12: Overall, how would you rate Long Island/your county as a place to live (Q10)?

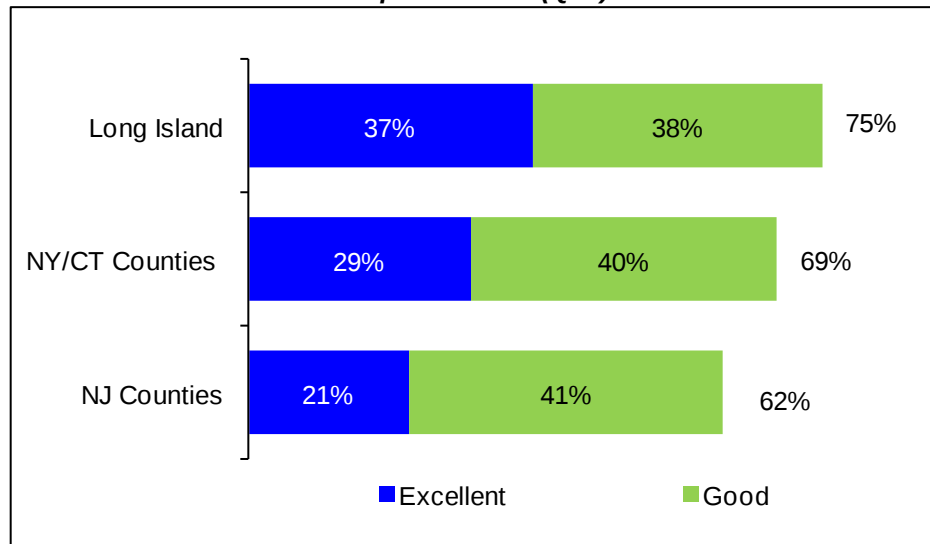


Figure 13: How strongly do you identify with Long Island/your county (Q11)?

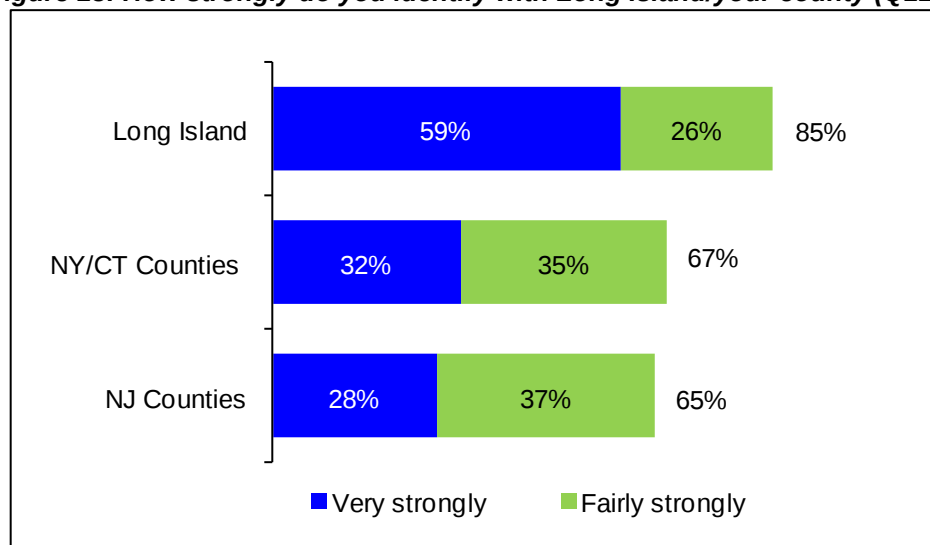
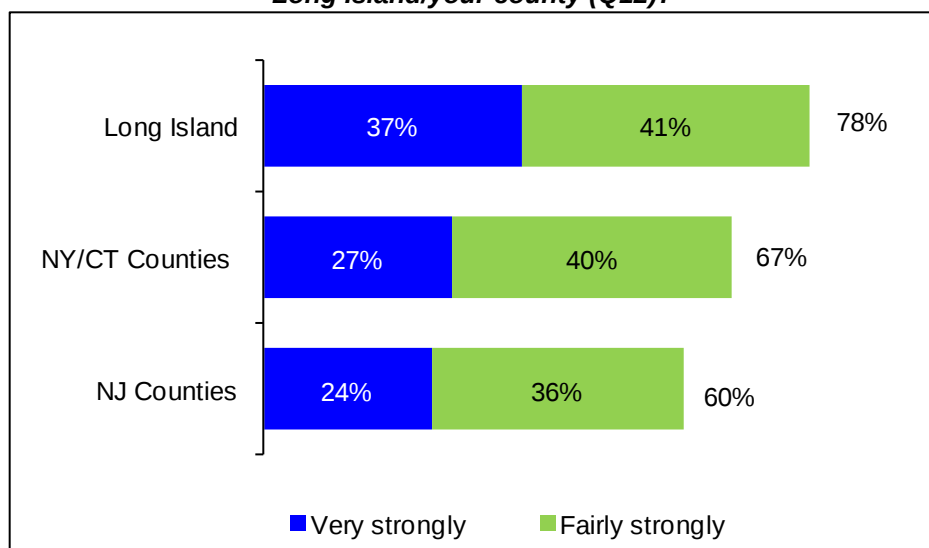


Figure 14: How strong a sense of community do you feel there is on Long Island/your county (Q12)?



The wealthiest Long Island residents are most likely to rate Long Island as an excellent place to live and have the strongest sense of identity. Likewise, home owners give a higher rating than renters to Long Island as a place to live and have a stronger sense of local identity. Older Long Island residents and those who have lived on Long Island for 10 years or more have a stronger local identity than younger residents or those who have lived on Long Island for less than 10 years. And older residents (aged 65 and older) are more likely than the young to rate Long Island as having a strong sense of community.

Thus, even though equal numbers of residents in all three regions think they might move in the next five years this would entail a greater loss for Long Island residents who are very attached to Long Island as a place to live.

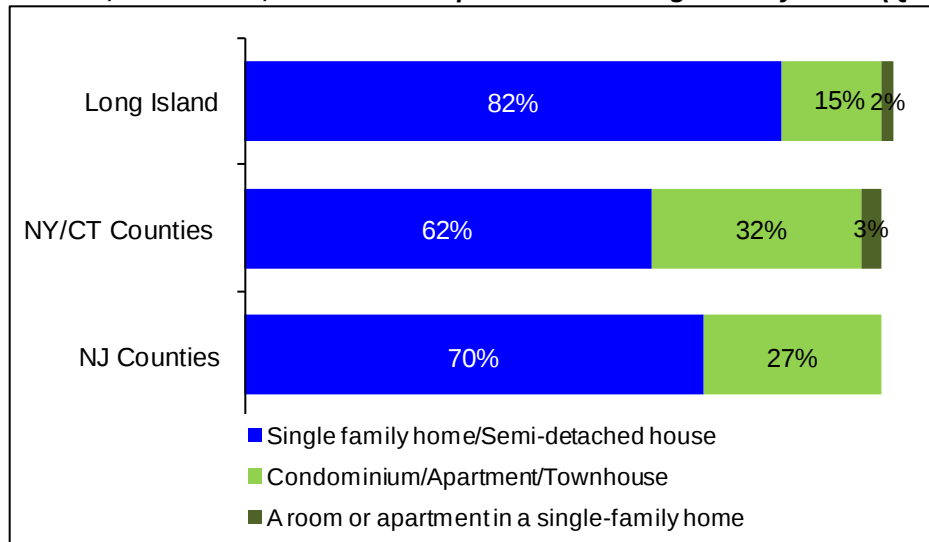
HOUSING PREFERENCES

One possible reason for more expensive housing on Long Island than in other areas is the housing supply which is dominated by single family homes to a greater degree than in either of the other NY metro areas under investigation.

Current Housing Situation

80% of Long Island residents live in a single family home compared to 69% of NJ and 59% of NY/CT residents. Only 15% of Long Island residents currently live in an apartment (11%), condo (3%) or townhouse (1%) compared to 32% of those in the northern suburbs and 27% of NJ residents. These numbers are strikingly different and reflect the shortage of diverse housing options on Long Island.

Figure 15: Do you currently live in a single family home, semi-detached home, condominium, apartment, townhouse, or a room or apartment in a single-family home (Q16)?



65% of low income Long Island residents live in a single-family home compared to 89% of those in households with an annual income of \$100,000 or more. 9% of Long Islanders with an income of \$35,000 or less live in a single room in an apartment or home. Owners (92%) are far more likely than renters (63%) to live in a single-family home. There are minor differences by age in current dwelling type: 72% of those aged 18 to 34, 83% of those aged 35-49, 87% of those aged 50-64, and 78% aged 65 or older live in a single-family home.

Figure 16: Do you currently live in a single family home, semi-detached home, condominium, apartment, townhouse, or a room or apartment in a single-family home (Q16)?
"Long Island Residents by Income"

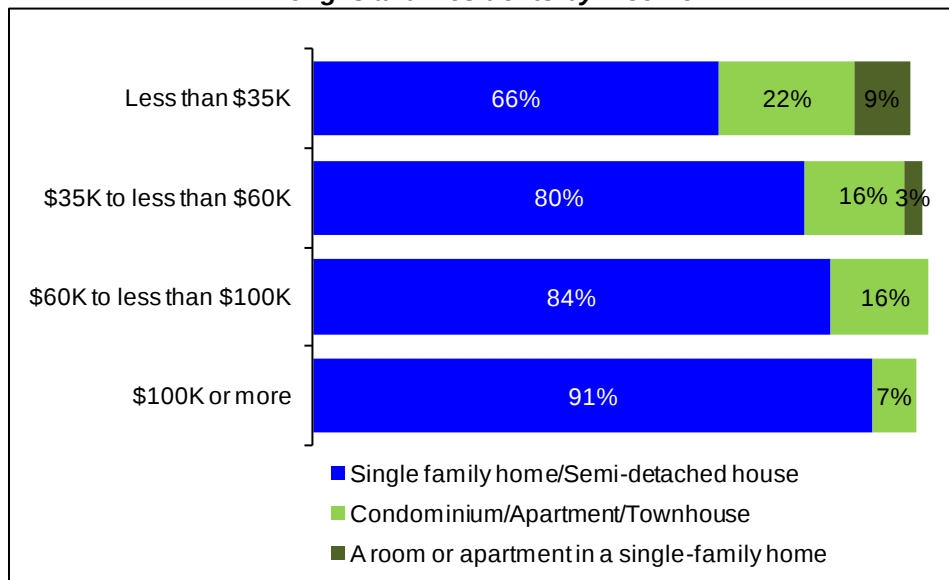
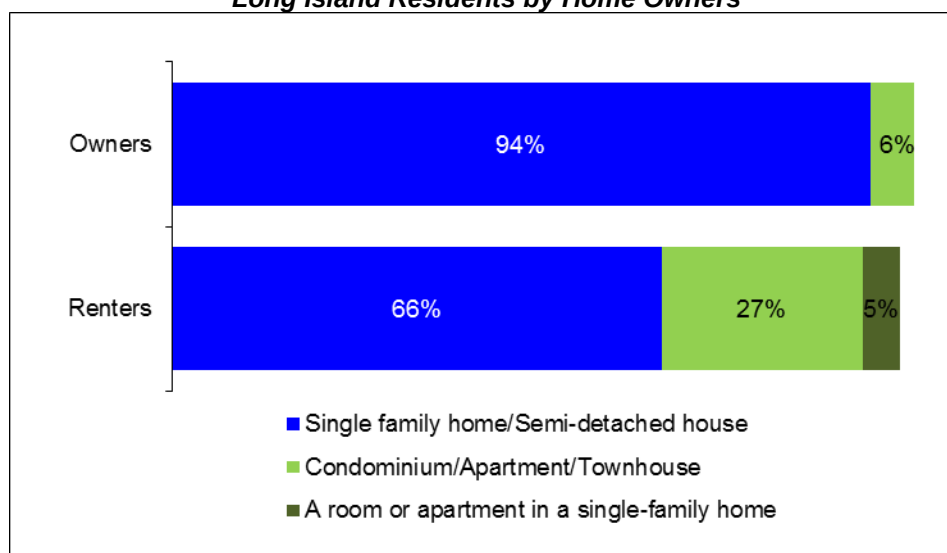


Figure 17: Do you currently live in a single family home, semi-detached home, condominium, apartment, townhouse, or a room or apartment in a single-family home (Q16)?
“Long Island Residents by Home Owners”



Future Housing Preferences

Five years from now, however, many fewer Long Island residents expect to live in a single family home and many more expect to live in a condo, townhouse, or apartment. Indeed, if residents were able to follow their expectations, a comparable number of Long Island, NJ, and NY/CT residents would live in multi-family housing developments in 2020. 65% of Long island residents expect to live in a single-family home in five years (a drop of 15%) whereas 29% expect to live in an apartment, condo, or townhouse.

The largest increase is in the number of people who expect to live in a condo, reflecting an increase from 3% currently to 10% in five years (an increase of over 300%). The percent who expect to live in a townhouse would increase from 1% currently to 4%, and apartment dwellers would increase from 11% to 15%. This represents a massive shift in housing options on Long Island away from the current emphasis on single family homes. In contrast, the number of residents who expect to live in an apartment declines from current numbers in the other two regions (from 18% to 15% in NJ, and from 20% to 14% in the northern suburbs).

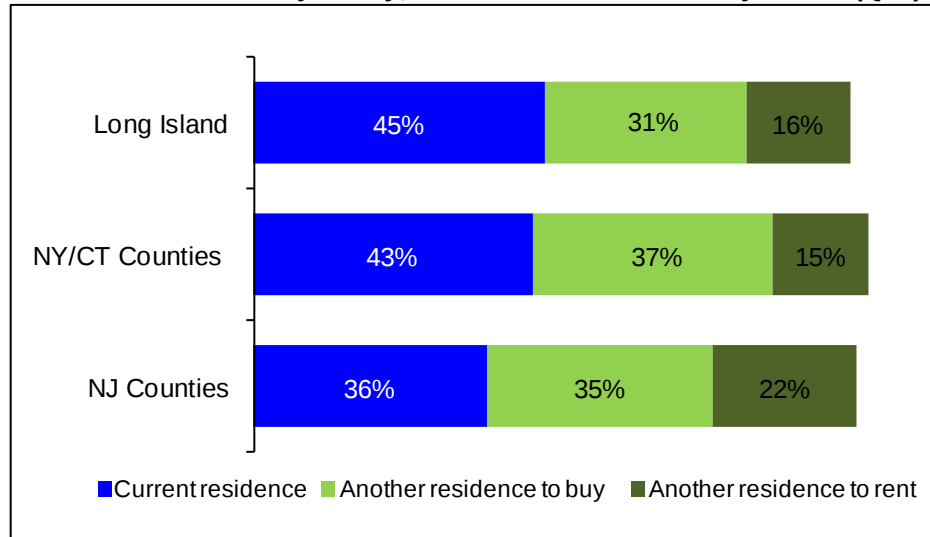
Table 1: Do you currently live in a single family home, semi-detached home, condominium, apartment, townhouse, or a room or apartment in a single-family home (Q16)?
In five years, what type of residence do you expect to live in (Q17)?
Long Island Residents

	Currently Live	Planning to live in 5 years
Single family home	80%	65%
Semi-detached house (e.g., duplex)	2%	2%
Condominium	3%	10%
Apartment	11%	15%
Townhouse	1%	4%
A room or apartment in a single-family home	2%	1%
Other	1%	1%

Changing Residence

A slightly greater number of Long Island residents (58%) than those in NJ (52%) or NY/CT (50%) suburbs own their home at present, and fewer rent. A surprisingly high number of residents in the NY suburban metro area – over a half--expect to change residence in the next five years. This expected mobility is greater in NJ than on Long Island and in the NY/CT northern suburbs. The majority of those who plan to move expect to purchase a home. Not surprisingly, young Long Islanders (18 – 34) are the most likely to move: 35% expect to buy a home and 31% expect to rent in five years.

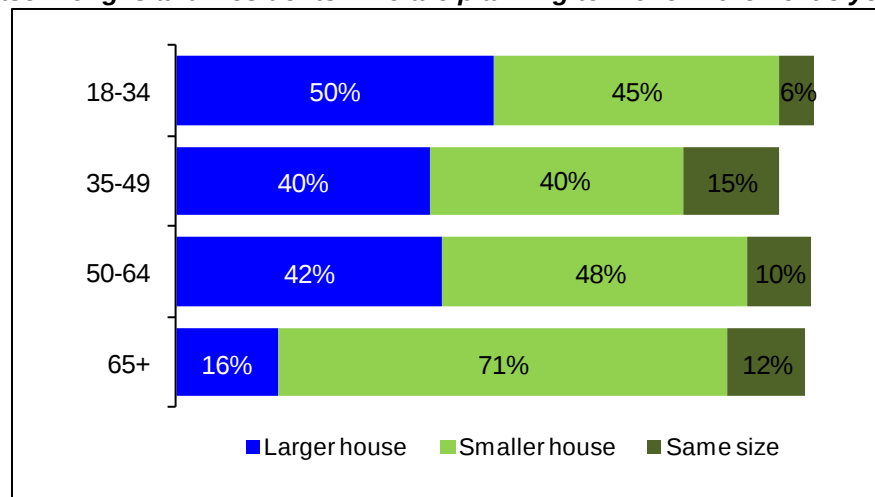
Figure 18: In five years do you expect to live in your current residence, another residence that you buy, or another residence that you rent (Q20)?



Future Home Size

There is greater desire to downsize on Long Island than in either of the other two local areas. Among those planning to move in the next five years, 48% of Long Island residents plan to move into a smaller home compared to 38% of NY/CT and 37% of NJ residents. On Long Island, a slightly higher number of younger residents expect to live in a larger (50%) than a smaller home (45%) but this balance tilts towards downsizing among older residents. Among those aged 50-64, 42% expect to move to a larger home and 48% plan to move to something smaller in five years. Among those aged 65 and older, 71% expect to downsize.

Figure 19: Do you expect your next home to be larger or smaller than your current home (Q21)?
Base: Long Island Residents Who are planning to move in the next 5 years

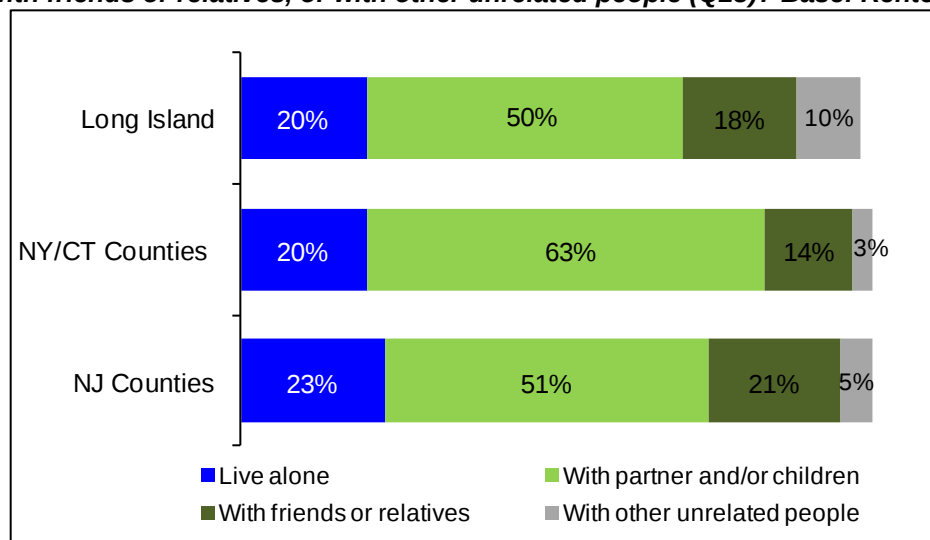


There is also widespread optimism among residents of all three regions that they will be able to afford to rent or own the kind of home that they want five years from now. More than 75% of residents in all three areas were somewhat or very confident of this.

Renting

On Long Island, 50% of renters live with their partner and children, 20% live alone, 18% live with friends or relatives and 10% live with unrelated people. The number of Long Island residents living with unrelated people is higher than in NJ (5%) or the northern suburbs (3%), suggesting a greater need to share housing costs.

Figure 20: In your current residence, do you live alone, with your partner and/or your children, with friends or relatives, or with other unrelated people (Q23)? Base: Renters



There were no regional differences, however, in the ability to find a good rental property. 53% of Long Island residents said that it had been difficult to find an acceptable rental the last time they moved, compared to 58% of NJ residents, and 49% of residents of the northern suburbs.

Living with Parents or Relatives

Across the region, roughly 15% of adults neither owned nor rented their residence; this increased to 34% among adults aged 18 to 34. On Long Island, roughly two-thirds of these individuals lived in the home of their parents; this number was even higher among those aged 18-34 (76%). This means that fully 26% of Long Island adults aged 18 to 34 live with their parents.

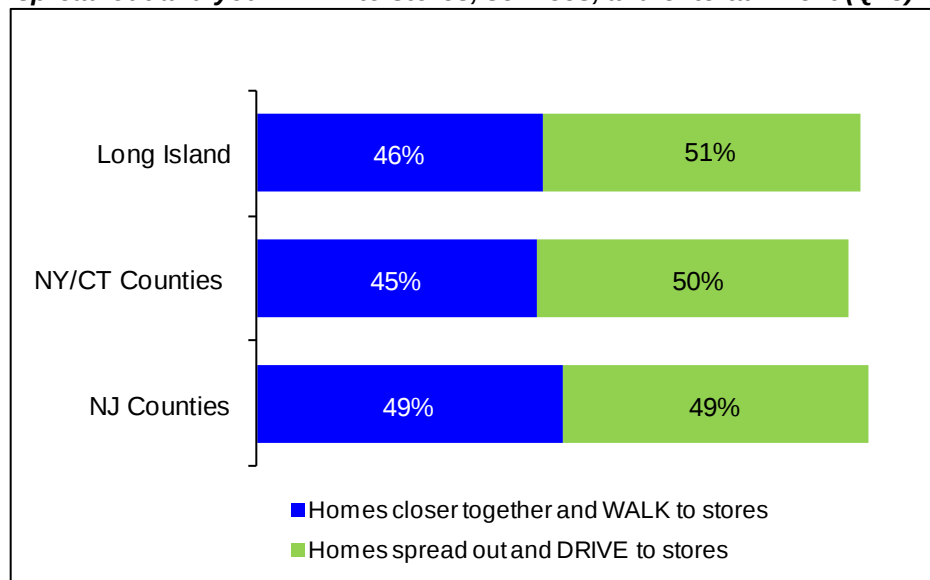
Virtually all adults aged 35 or older contributed financially to this type of living arrangement but this number dropped to 53% among those aged 18 to 34. When combined with the number of young people living with their parents, roughly 15% of young adults aged 18 to 34 live with their parents and do not contribute to household expenses. These numbers are similar in all three regions.

The vast majority of residents in all three areas were somewhat or very satisfied with their current housing.

NEIGHBORHOOD PREFERENCES

59% of Long Island and NJ and 55% of NY/CT residents said it was somewhat or very important to them to live within walking distance of shops and entertainment. Residents were a little more torn, however, when asked whether they would prefer to live in an area where homes are closer together within walking distance of stores or where homes were more spread out and stores were within driving distance. On Long Island, 51% preferred lower density housing and 46% preferred a neighborhood with higher density housing. A similar balance was observed in the NY/CT suburbs. Thus, residents were fairly evenly split between the two kinds of neighborhoods. It is worth noting that the large numbers of Long Island residents who would trade lower density neighborhoods for higher density areas with greater proximity to stores is out of synch with the current reality in which most Long Island residents need to drive to local shopping and entertainment venues.

Figure 21: Would you prefer to live in a neighborhood where homes are close together and you can WALK to a local stores, services, and entertainment OR in a neighborhood where homes are spread out and you DRIVE to stores, services, and entertainment (Q18)?

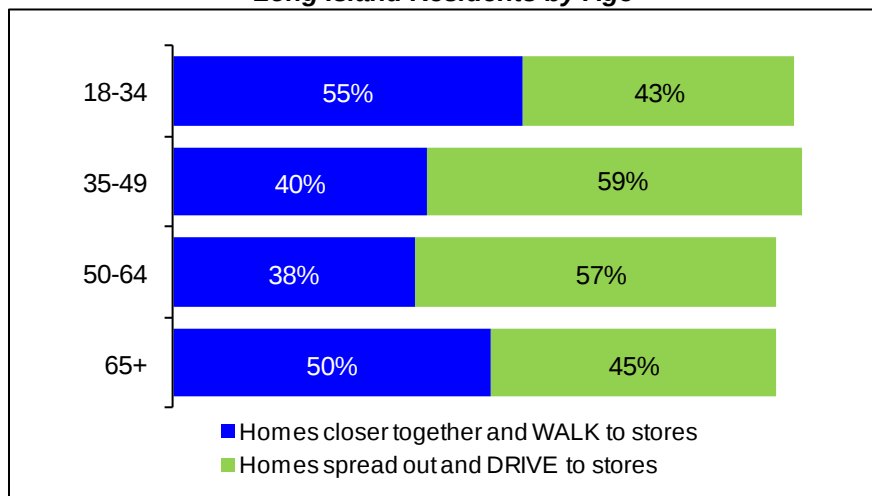


On Long Island, the youngest and oldest age groups express the strongest preference for more dense housing close to stores and entertainment. 55% of those aged 18 to 34 chose more dense housing in which they could walk compared to 43% who chose a neighborhood which involved driving to stores. Among those aged 65 and older, the balance was 50% in favor of more dense housing and 45% who

preferred a neighborhood with less dense housing. The balance tilted towards less dense housing and more driving among those aged 35 to 64.

Figure 22: Would you prefer to live in a neighborhood where homes are close together and you can WALK to a local stores, services, and entertainment OR in a neighborhood where homes are spread out and you DRIVE to stores, services, and entertainment (Q18)?

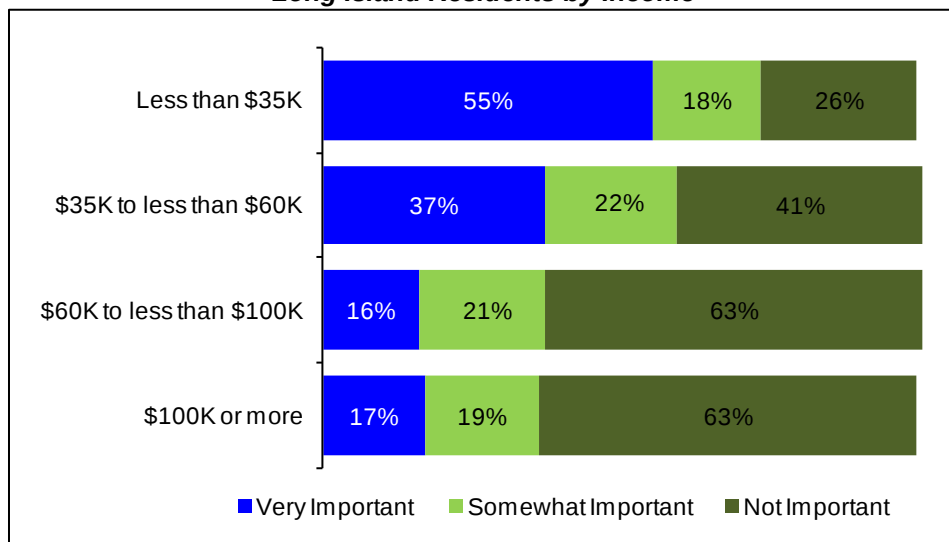
“Long Island Residents by Age”



A near majority of local residents on Long Island (48%) and a majority in the two other regions (55% in NY/CT and 52% in NJ) said it was somewhat or very important to live within walking distance of a train station or bus stop. On Long Island, this was most important among young, black, Latino, and low income residents.

Figure 23: In thinking about a place to live, how important is it to you to live within walking distance of a train station or bus stop (Q14)?

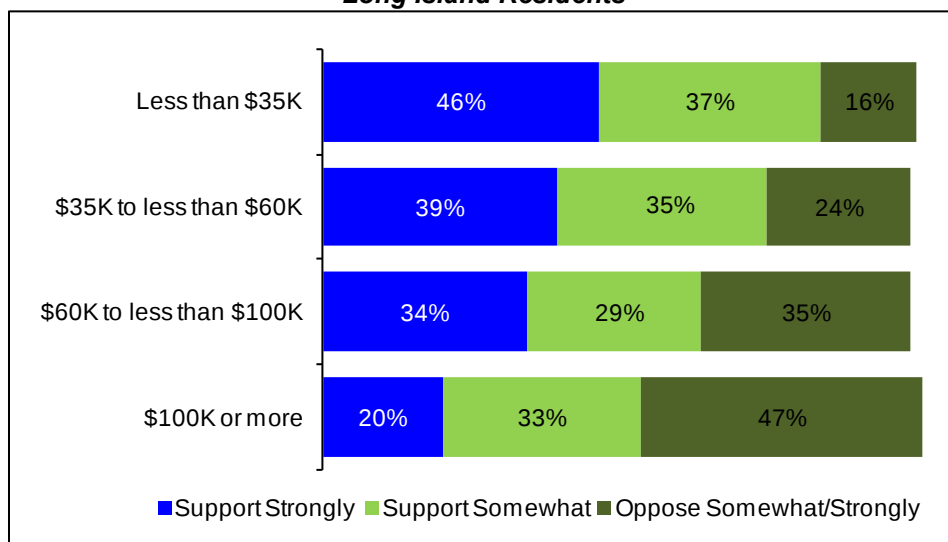
“Long Island Residents by Income”



HOUSING SOLUTIONS

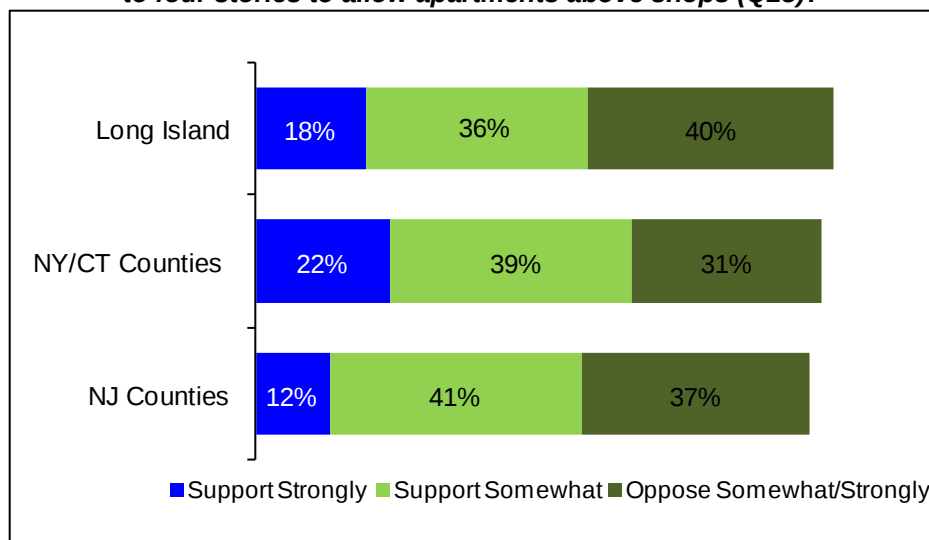
There is majority support for solutions that would make housing more affordable across the region. This included support for changing zoning laws to make it easier to install a rental apartment in a single-family homes in all three areas (62% on LI, 58% in northern suburbs, and 59% in NJ). On Long Island, this support was most pronounced among lower income, renters, the young, black, and Latino residents.

Figure 24: To what extent do you support or oppose changing local zoning rules in your county to make it easier to install a rental apartment in a single-family home (Q30)?
“Long Island Residents”



There was also broad support across the region for making local downtowns more residential. A majority of residents in all three regions supported raising height limits in local downtowns to build apartments. This proposal was especially popular among young Long Island residents: 70% of those aged 18-34 supported this kind of change.

Figure 25: To what extent do you support or oppose a change in zoning laws that would increase height limits in some downtown areas in your county from two to four stories to allow apartments above shops (Q28)?



Just under a half of residents in all three regions could imagine themselves or a family member living in a local downtown area. A majority (51%) of Long Island residents aged 18-34 could imagine doing so. There was also majority support for building new multi-level parking garages in local downtowns in all three areas.

METHODOLOGY

The survey was conducted by Princeton Survey Research Associates International (PSRAI). Interviews were administered in English by Survey Sampling International from September 24 to October 19, 2015 with a representative sample of 1,561 adults living in Connecticut, New York and New Jersey. Interviews were conducted via landline and cell phone. Regional quotas were set and each region had separate landline and cell samples. In addition to sampling all adults 18+ in Long Island a separate oversample of 18-34 year olds was obtained as well. The oversampling was done through screening RDD landline and cell samples.

As many as 5 attempts were made to contact every sampled telephone number. The sample was released for interviewing in replicates, which are representative subsamples of the larger sample. Using replicates to control the release of sample ensures that complete call procedures are followed for the entire sample. Calls were staggered over times of day and days of the week to maximize the chance of making contact with potential respondents. Interviewing was spread as evenly as possible across the days in field. Each telephone number was called at least one time during the day in an attempt to complete an interview.

For the landline sample, interviewers asked to speak with the youngest adult male or female currently at home based on a random rotation. If no male/female was available, interviewers asked to speak with the youngest adult of the other gender. This systematic respondent selection technique has been shown to produce samples that closely mirror the population in terms of age and gender when combined with cell interviewing.

For the cellular sample, interviews were conducted with the person who answered the phone. Interviewers verified that the person was an adult and in a safe place before administering the survey. Cellular respondents were offered a post-paid cash reimbursement for their participation.

The sample was weighted to match adult general population parameters. A four-stage weighting procedure was used to weight this dual-frame sample.

The first stage of weighting corrects for different probabilities of selection associated with the number of adults in each household and each respondent's telephone usage patterns. The second stage of weighting was a simple adjustment to the Long Island sample to account for the oversampling of 18-34 year olds. The third stage of weighting balanced sample demographics to population parameters. The fourth and final stage of weighting included two adjustments to the total sample. The use of these weights in statistical analysis ensures that the demographic characteristics of the sample closely approximate the demographic characteristics of the national population.

The margin of sampling error for the complete set of weighted data is ± 4.3 percentage points.

Long Island = Nassau, Suffolk

North (NY/CT Counties) = Westchester, Rockland, Orange, Fairfield

NJ Counties = Bergen, Passaic, Hudson, Hunterdon, Middlesex, Somerset, Monmouth, Mercer, Warren, Ocean, Essex, Morris, Sussex, Union

Frequency Questionnaire

INTRODUCTION

Hello, my name is _____ and I'm calling for Princeton Survey Research. We're conducting a survey about some important issues in your county today, and would like to include your household. [READ IF NECESSARY: Your phone number has been randomly selected to complete the survey. We are not selling anything.]

NOTE: Long Island percentages are based on the 800 respondents in the main sample and an oversample of 250 young adults for a total of 1052.

For the first couple of questions we would like you to think about the OVERALL condition of your County.

Question Q01

Generally speaking, do you think things in [Nassau/Suffolk/your County] today are headed in the right direction or in the wrong direction?

RESPONDENTS	LI 1052 %	North 255 %	NJ 254 %
Right direction	58	57	61
Wrong direction	30	34	24
Don't know	12	9	15

[Note: Due to rounding, the numbers may not add up to 100%]

Question Q02

Overall, what do you think is the MOST important problem facing residents of [Suffolk/Nassau/Your] county today?

[Open-ended question, with recoded responses]

	LI %	North %	NJ %
Taxes/Property taxes	37	25	20
Economy/Foreclosures/Finances/Jobs/Poverty	11	15	13
Crime/Drugs	7	5	13
Lack of adequate and affordable housing	6	7	5
Traffic/Transportation/Roads	6	8	7
Environmental issues/Water quality/Pollution	4	1	3
Education	3	6	5
Government/Corruption/Services	3	2	3
Other	5	6	7
Nothing	1	1	3
Don't know	16	22	20

Question Q03

In your view, how serious a problem are high property taxes in [Suffolk/Nassau/Your] County?

	LI %	North %	NJ %
Extremely serious	32	25	22
Very serious	39	38	38
Somewhat serious	15	20	21
Not very serious	5	10	8
Not at all serious	4	4	5
Don't know	4	4	6

Question Q04

[In your view], how serious a problem is the lack of affordable housing in [Nassau/Suffolk/your County]?

	LI %	North %	NJ %
Extremely serious	27	21	14
Very serious	33	28	33
Somewhat serious	20	28	25
Not very serious	8	10	12
Not at all serious	6	7	9
Don't know	5	5	8

Question Q05

[In your view], how serious is the problem of young people moving away from [Nassau/Suffolk/your County] because of the high cost of living?

	LI %	North %	NJ %
Extremely serious	38	20	17
Very serious	34	30	27
Somewhat serious	16	26	22
Not very serious	5	9	14
Not at all serious	4	8	11
Don't know	3	6	8
Refused	-	1	-

Question Q06

In an average month, how difficult is it for you and your family living with you to pay the rent or mortgage?
Would you say it is...

	LI %	North %	NJ %
Very difficult	28	27	24
Somewhat difficult	34	31	28
Not very difficult	15	19	20
Not at all difficult	20	21	25
Don't know	2	2	3
Refused	-	1	-

Question Q07

How concerned are you that the high cost of housing will force members of your family to move out of [Nassau/Suffolk/your County]?

	LI %	North %	NJ %
Very concerned	48	38	38
Somewhat concerned	22	25	26
Not very concerned	12	16	15
Not at all concerned	16	17	19
Don't know	1	2	2

Question Q08

How likely is that you will move out of [Nassau/Suffolk/your County] to an area with lower housing costs and property taxes in the next 5 years?

	LI %	North %	NJ %
Very likely	36	36	36
Somewhat likely	20	21	23
Not very likely	18	16	14
Not at all likely	25	25	25
Don't know	1	2	1

Base: Likely to move out in the next 5 years

Question Q09

What type of place would you be most likely to move to?

	LI %	North %	NJ %
A large city	12	16	5
Suburb of a large city	24	17	16
Small city	17	22	31
Suburb of a small city	23	21	21
Rural area	19	17	22
Don't know	5	9	4

Question Q10

Overall, how would you rate [Long Island/your County] as a place to live?

	LI %	North %	NJ %
Excellent	37	29	21
Good	38	40	41
Fair	18	24	29
Poor	7	6	8
Don't know	-	-	1

Question Q11

How strongly do you identify with [Long Island/Your County]?

	LI %	North %	NJ %
Very strongly	59	32	28
Fairly strongly	26	35	37
Not very strongly	9	21	18
Not at all	5	12	14
Don't know	1	1	2
Refused	-	-	1

Question Q12

How strong a sense of community do you feel there is on [Long Island/ your county]? Is it...

	LI %	North %	NJ %
Very strong	37	27	24
Somewhat strong	41	40	36
Not very strong	14	21	24
None at all	7	11	12
Don't know	1	2	3
Refused	-	-	1

Question Q13

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

	LI %	North %	NJ %
Better	15	15	21
Worse	32	31	29
Same/No difference	52	51	45
Don't know	1	3	4
Refused	-	-	1

Question Q14

In thinking about a place to live, how important is it to you to live within walking distance of a train station or bus stop?

	LI %	North %	NJ %
Very important	28	34	32
Somewhat important	20	21	20
Not very important	23	20	19
Not at all important	28	26	28
Don't know	-	-	1

Question Q15

How important is it to you to live within walking distance of shops and entertainment options?

	LI %	North %	NJ %
Very important	29	33	32
Somewhat important	30	25	27
Not very important	22	23	18
Not at all important	19	19	23
Don't know	-	-	1

Question Q16

Do you currently live in a single family home, semi-detached home, condominium, apartment, townhouse, or a room or apartment in a single-family home?

	LI %	North %	NJ %
Single family home	80	59	65
Semi-detached house (e.g., duplex)	2	3	5
Condominium	3	7	7
Apartment	11	20	18
Townhouse	1	5	2
A room or apartment in a single-family home	2	3	2
Other	1	1	-
Don't know	1	1	1

Question 17

In five years, what type of residence do you expect to live in?

	LI %	North %	NJ %
Single family home	65	58	64
Semi-detached house (e.g., duplex)	2	3	4
Condominium	10	8	6
Apartment	15	14	15
Townhouse	4	9	3
A room or apartment in a single-family home	1	2	2
Other	1	1	3
Don't know	3	4	2

Question Q18

Would you prefer to live in a neighborhood where homes are close together and you can WALK to a local stores, services, and entertainment OR in a neighborhood where homes are spread out and you DRIVE to stores, services, and entertainment?

	LI %	North %	NJ %
Homes closer together and WALK to stores	46	45	49
Homes spread out and DRIVE to stores	51	50	49
Don't know	3	5	2
Refused	-	1	-

Question Q19

Do you own the home you are currently living in, are you renting, or do you have some other arrangement, such as living in the home of a parent, in-laws, or another relative, or somewhere else?

	LI %	North %	NJ %
Own	58	50	52
Rent	24	35	33
Live with parents, in-laws, another relative	13	12	12
Other	2	1	2
Don't know	-	2	1
Refused	-	1	-

Question Q20

In five years do you expect to live in your current residence, another residence that you buy, or another residence that you rent?

	LI %	North %	NJ %
Current residence	45	43	36
Another residence to buy	31	37	35
Another residence to rent	16	15	22
Don't know	7	5	8

Base: Not planning to be in current home in the next 5 years

Question Q21

Do you expect your next home to be larger or smaller than your current home?

	LI %	North %	NJ %
Larger house	41	52	50
Smaller house	48	38	37
Same size	11	9	13
Don't know	1	1	-

Question Q22

How confident are you that you will be able to afford to own or rent the kind of home that you want in the next five years?

	LI %	North %	NJ %
Very confident	42	43	36
Somewhat confident	38	35	41
Not very confident	11	10	12
Not confident at all	6	8	9
Don't know	3	3	2
Refused	-	1	-

Base: Renters

Question Q23 - Renters

In your current residence, do you live alone, with your partner and/or your children, with friends or relatives, or with other unrelated people?

	LI %	North %	NJ %
Live alone	20	20	23
With partner and/or children	50	63	51
With friends or relatives	18	14	21
With other unrelated people	10	3	5
Refused	4	-	-

Base: Renters

Question Q24

Thinking back to when you last moved, how easy or difficult was it to find an acceptable place to rent in [Nassau/Suffolk/your County]?

	LI %	North %	NJ %
Very easy	16	9	21
Somewhat easy	20	20	13
Neither easy nor difficult	6	19	6
Somewhat difficult	21	28	25
Very difficult	32	21	33
Don't know	2	2	2
Refused	4	-	-

Base: Renters who live in an apartment or room within a home (Cautious = Base it too small)

Question Q25a

Before I ask you the next question, I want to remind you that everything we discuss is confidential.

Is the apartment or room you rent a legal rental as far as you know?

	LI %	North %	NJ %
Yes	87	100	69
No	13	-	31

Base: Only other living arrangement apart from owning or renting.

Question Q25b

Do you currently live in a parent's home, in a child's home, a home owned by another relative, or in some other situation?

	LI %	North %	NJ %
Parent's home	65	55	71
Child's home	4	15	-
Home owned by another relative	16	18	14
Some other situation	14	8	16
Don't know	1	-	-
Refused	-	4	-

If select "some other situation" in Q25b

Q25c

What is your current living arrangement? [IF NEEDED: In whose home do you currently live? Are you living with a friend? Or are you currently without a fixed home? Please tell me about your current living situation]

This is an open-ended question.

	LI %	North %	NJ %
Assisted Living/Senior Housing/Dorm	19	61	29
Group Home/Public Housing	3	19	-
Living with a partner	12	-	26
Living with a friend	23	-	-
Other	20	10	12
Don't know	-	-	33
Refused	23	-	-

Question Q25d

Do you currently contribute financially to the household budget by paying rent or helping out with utility costs?

	LI %	North %	NJ %
Yes	64	60	60
No	35	35	38
Don't know	1	-	3
Refused	1	5	-

Question Q26

How satisfied are you with your current housing?

	LI %	North %	NJ %
Very satisfied	49	51	52
Somewhat satisfied	41	34	33
Not very satisfied	6	8	6
Not c satisfied at all	3	5	7
Don't know	1	2	1

Question Q27

Can you imagine an immediate family member, such as a child or parent, ever living in an apartment, condo, or townhouse in a local DOWNTOWN area [on Long Island/in Your County]?

	LI %	North %	NJ %
Yes	44	48	45
No	52	46	50
Live there now	1	1	1
Don't know	2	5	3
Refused	-	-	-

Question Q28

To what extent do you support or oppose a change in zoning laws that would increase height limits in some downtown areas in [Nassau/Suffolk County] from two to four stories to allow apartments above shops?

	LI %	North %	NJ %
Support strongly	18	22	12
Support somewhat	36	39	41
Somewhat oppose	17	17	15
Strongly oppose	23	14	22
Don't know	6	8	9
Refused	-	1	1

Question Q29

To what extent would you support or oppose building new multi-level parking facilities in local downtown areas in [Nassau/Suffolk County]?

	LI %	North %	NJ %
Support strongly	20	22	23
Support somewhat	38	39	35
Somewhat oppose	15	18	14
Strongly oppose	22	16	23
Don't know	5	4	5
Refused	1	-	-

Question Q30

To what extent do you support or oppose changing local zoning rules in [Suffolk/Nassau] county to make it easier to install a rental apartment in a single-family home?

	LI %	North %	NJ %
Support strongly	29	23	26
Support somewhat	33	35	33
Oppose somewhat	12	19	14
Oppose strongly	21	17	23
Don't know	3	6	4
Refused	1	-	-

DEMOGRAPHICS**Question QD1**

Now, I have some questions about your background. I want to assure you that all your responses are completely confidential and will only be used to report group averages.

Are you Hispanic or Latino/Latina?

	LI %	North %	NJ %
Yes	14	16	17
No	82	77	79
Don't know / refused	4	7	4

Question QD2

Do you consider yourself White, Black, Asian or something else?

	LI %	North %	NJ %
White	71	63	60
Black/African-American	9	13	13
Asian	6	4	10
Other	8	10	11
Don't know	7	10	7

Question QD3

How long have you lived in Nassau County/Suffolk County/your county?

	LI %	North %	NJ %
Under six months	1	2	1
Six months to a year	1	2	2
One year to two years	2	3	3
Between two and five years	5	8	7
Between five and ten years	7	6	9
Over 10 years	49	48	50
All my life	30	26	24
Don't know	-	-	1

Question QD4

In general, when it comes to politics, do you think of yourself as a Liberal, a Moderate, or a Conservative?

	LI %	North %	NJ %
Liberal	25	22	23
Moderate	27	29	28
Conservative	30	32	35
Don't know / Refused	7	7	5

Question QD5

How many children under the age of 18 are currently living in your household?

	LI %	North %	NJ %
None	62	60	62
1 or more	32	33	32
Don't know / refused	7	7	6

Question QD6

How many people 18 years and older, including yourself, are currently living in your household?

	LI %	North %	NJ %
One	16	25	24
Two	35	40	37
Three	19	17	17
Four or more	18	9	13
Don't know/Refused	12	10	10

Question QD10

What is the highest grade of school, year of college or highest degree that you have received?

[Open-ended question, with recoded responses]

	LI %	North %	NJ %
High school or less	32	34	36
Some college	26	22	23
College graduate or more	34	38	34
Refused	7	6	7

Question QD11

Are you currently:

	LI %	North %	NJ %
Employed for wages full-time	38	45	36
Employed for wages part-time	9	9	10
Self-employed	9	10	10
Out of work for more than 1 year	2	3	4
Out of work for less than 1 year	2	2	2
Homemaker	4	2	4
Full-time student	5	6	5
Retired	18	11	14
Unable to work / permanently disabled	6	5	8
Don't know/Refused	8	8	7

Question QD12

What is/was your occupation?

[Open-ended question, with recoded responses]

	LI %	North %	NJ %
Professional / Manager / Owner	29	35	29
Teachers / Librarians / Professors	6	5	5
Sales / Clerical / Service Worker	28	24	30
Skilled Laborer / Tradesman	7	8	10
Semi- or Unskilled Laborer	6	4	6
None / retired	4	3	2
Don't know	7	5	8
Refused	14	16	9

Question QD13

Which of the following income categories best describes the total 2009 household income of all members of your family living there before taxes. Stop me when I reach your income group. Was it...

[Open-ended question, with recoded responses]

	LI %	North %	NJ %
Less than \$35,000	14	17	19
\$35,000 to less than \$60,000	14	12	15
\$60,000 to less than \$100,000	19	19	17
\$100,000 or more	24	27	25
Don't know / Refused	28	24	24

Question QD15

Are you married; not married but living with a partner; separated; divorced; widowed; or have you never been married?

	LI %	North %	NJ %
Married	47	45	40
Not married, living with a partner	7	7	7
Separated	2	2	4
Divorced	7	8	10
Widowed	6	7	6
Never married	20	19	23
Don't know	11	11	9

Question QD16

And finally one last question. Occasionally a news reporter needs to talk to people about some of the topics on our survey. Would you be willing to speak with a reporter, and allow us to share your responses with the reporter?

	LI %	North %	NJ %
Yes	39	29	34
No	62	71	66

AGE

In what year were you born?

[Open-ended question, with recoded responses]

	LI %	North %	NJ %
18 to 34	25	24	27
35 to 49	21	22	23
50 to 64	27	26	27
65 +	18	17	17
Refused	9	10	7

GENDER

	LI %	North %	NJ %
Female	51	52	52
Male	49	48	48

County of Residence

	LI %	North %	NJ %
Nassau	47	-	-
Suffolk	53	-	-
Westchester	-	38	-
Rockland	-	16	-
Orange	-	17	-
Fairfield	-	29	-
Bergen	-	-	9
Passaic	-	-	6
Hudson	-	-	7
Hunterdon	-	-	2
Middlesex	-	-	19
Sommerset	-	-	4
Monmouth	-	-	7
Mercer	-	-	4
Warren	-	-	2
Ocean	-	-	13
Essex	-	-	14
Morris	-	-	5
Sussex	-	-	4
Union	-	-	4