American’s Views on their Communities, Housing, and Transportation

Analysis of a national survey for the Urban Land Institute Terwilliger Center for Housing

May 2013
Objectives of Research

Determine:

- Americans’ satisfaction with their communities, housing, transportation;
- What they want for themselves and their families;
- Interest in compact developments; and
- How demand varies by generation.
Methods

- Telephone survey, landline and cell
- January 16 to February 3, 2013
- N = 1,202 American adults
- Margin of sampling error = ±2.9 percentage points
Findings
Satisfaction with community life
Quality of life in community

Currently

- Very satisfied: 49%
- Somewhat satisfied: 38%
- Somewhat dissatisfied: 7%
- Very dissatisfied: 5%

Prospectively

- Staying about the same: 63%
- Getting better: 19%
- Getting worse: 17%
- Very dissatisfied: 7%
Satisfaction features of communities

- Range of housing types: 83%
- Quality of the public transit - where available: 75%
- Range of transportation options: 72%
- Sidewalks: 71%
- Number and quality of job and career opportunities: 49%
- Availability of public transit - where not available: 43%
Enduring appeal of single-family homes and ownership
Homeownership as an investment

71% believe “buying a home is probably a good investment for me.”

Especially:

- 87% over $75,000;
- 80% college graduates; and
- 79% Generation X.
Likely movers expect to own their home within five years

<table>
<thead>
<tr>
<th></th>
<th>Current</th>
<th>Expected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family home</td>
<td>56%</td>
<td>67%</td>
</tr>
<tr>
<td>Apartment</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>Duplex, row house, or townhouse</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Manufactured or mobile home</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Own</td>
<td>48%</td>
<td>73%</td>
</tr>
<tr>
<td>Rent</td>
<td>47%</td>
<td>25%</td>
</tr>
</tbody>
</table>
Getting around: cars, foot and public transit
How we get around

Among the general population, nearly everyday:

- 77% go somewhere by car, truck, or motorcycle;
- 22% walk several blocks or more;
- 6% take public transit; and
- 2% ride a bicycle.
At least once a week

Among the general population

- 91% go somewhere by car, truck, or motorcycle;
- 44% walk several blocks or more;
- 11% take public transit; and
- 14% ride a bicycle.
Just among **commuters**, who uses commutes by public transportation?

11% of all commuters use public trans.

- 32% of residents of big cities
- 32% of African Americans
- 20% of Latinos
- 24% of those with incomes under $25,000
- 18% of Generation Y and 21% singles
- 21% in the Northeast
Satisfaction with public transportation is high where available, not so good where lacking

- Range of housing types: 83%
- Quality of the public transit - where available: 75%
- Range of transportation options: 72%
- Sidewalks: 71%
- Number and quality of job and career opportunities: 49%
- Availability of public transit - where not available: 43%
The interface of desired community characteristics and compact developments
Importance of neighborhood attributes

- Neighborhood safety: 92%
- The quality of public schools: 79%
- A lot of space between neighbors: 72%
- Close to work/school: 71%
- Close to medical care: 71%
- Walkability: 70%
- Close to shopping, etc.: 66%
- Close to parks: 64%
- Close to your family/friends: 63%
- Convenient public transportation: 52%
Majorities of likely movers attracted to attributes of compact communities

<table>
<thead>
<tr>
<th>% Preferring</th>
<th>% Preferring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Longer commute/bigger home</td>
<td>Shorter commute/smaller home</td>
</tr>
<tr>
<td>38%</td>
<td>59%</td>
</tr>
<tr>
<td>Away from shops, etc.</td>
<td>Close to shops, etc.</td>
</tr>
<tr>
<td>37%</td>
<td>62%</td>
</tr>
<tr>
<td>Similar incomes</td>
<td>Mix of incomes</td>
</tr>
<tr>
<td>49%</td>
<td>47%</td>
</tr>
<tr>
<td>Public transportation doesn’t matter</td>
<td>Available public transportation</td>
</tr>
<tr>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>Similar homes</td>
<td>A mix of homes</td>
</tr>
<tr>
<td>48%</td>
<td>50%</td>
</tr>
</tbody>
</table>
54% would like a community with three plus of the attributes of compact development

- 70% of African Americans
- 66% of multigenerational households
- 66% of singles
- 65% of medium sized city residents
- 65% of big city residents
- 63% of <$25,000
- 62% of renters
- 62% of living alone
Generational break down
War Babies (67-82) and Silent Generation (83+)

- Most likely to...
  - Stay in their current homes
  - Want to be in walkable neighborhoods
  - Want to be close to health services, family and friends, and shopping and entertainment
Baby Boomers (48-66)

- Unlikely to move soon, but when they do, they want to...
  - Live in a smaller home and have a shorter commute
  - Be close to parks
  - Have space between them and their neighbors
Generation X (35-47)

- Many anticipate moving in the next five years, when they do, they are...
  - Unlikely to move to mixed use communities or communities with public transit
  - Likely to buy a single-family home
Generation Y (18-34)

- Most likely to...
  - Live in mixed use communities
  - Be unsatisfied with where they live
  - Move in the next five years to walkable communities with public transit options
Thank you
Belden Russonello Strategists conducts survey and focus group research and provides research-based message development and communications consulting.

Belden Russonello Strategists
1320 19th Street NW, Suite 620,
Washington, DC 20036
nancybelden@brspoll.com

ULI 2013