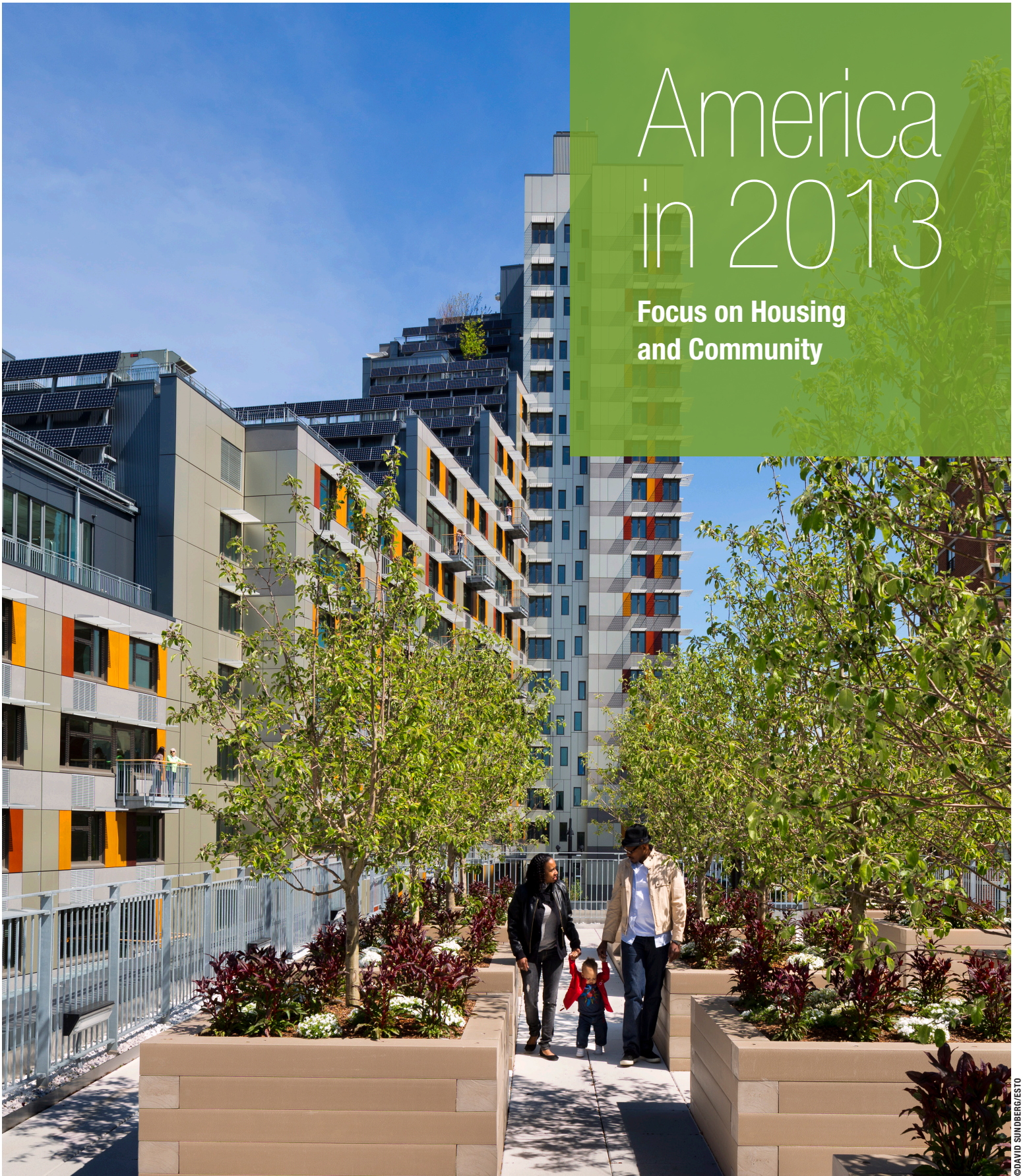


America in 2013

Focus on Housing
and Community



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**Urban Land
Institute**

Infrastructure Initiative



**Urban Land
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Terwilliger Center for Housing

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About Us



Since 1982, Belden Russonello Strategists LLC has helped nonprofits, political campaigns, news media, and other clients understand the relationships between issues and motivations for action, whether it is rethinking policy, attracting new members, or changing attitudes and behavior.



ULI's Infrastructure Initiative works to promote more sustainable infrastructure investment choices and to foster an improved understanding of the links between infrastructure and land use.



ULI's Terwilliger Center for Housing engages in a multifaceted program of work that furthers the development of mixed-income, mixed-use communities with a full spectrum of housing affordable to all, a critical aspect of ULI's core mission of "providing leadership in the responsible use of land."

Learn more about "America in 2013" at www.uli.org/communitysurvey.

America in 2013

A ULI Survey of Views on
Housing, Transportation,
and Community

Focus on Community Satisfaction

How satisfied are Americans with their communities? This fact sheet shares key findings from “America in 2013” on community satisfaction.

“America in 2013” is a national survey conducted by Belden Russonello Strategists LLC on behalf of the ULI Terwilliger Center for Housing and the ULI Infrastructure Initiative.

About Half of Americans Are Very Satisfied with the Quality of Life in Their Community

According to the survey, 49 percent of Americans are somewhat or very satisfied with the quality of life in their community. The oldest Americans report the highest satisfaction levels, with 67 percent of war babies/the silent generation saying they are very satisfied with their community’s quality of life. However, only 40 percent of gen Yers report being very satisfied with their community.

Overall, 38 percent of Americans say they are somewhat satisfied, leaving some room for improvement. Dissatisfaction is especially pronounced among gen Yers and baby boomers: 16 percent of gen Yers and 14 percent of baby boomers say they are somewhat or very dissatisfied with life in their community.

Satisfaction with Community’s Quality of Life, by Generation

Percentage

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied
All adults	49	38	7	5
Gen Y	40	42	9	7
Gen X	51	40	4	5
Baby boomers	47	37	9	5
War babies/silent generation	67	28	2	3

Visit www.uli.org/communitysurvey to learn more about “America in 2013.”

Satisfaction with Community Quality of Life Varies by Income and Location

Satisfaction with the quality of life in a community correlates with income. Lower-income Americans report the lowest levels of satisfaction, with 20 percent of those making less than \$25,000 annually per household saying they are somewhat or very dissatisfied with their community's quality of life, and only 42 percent saying they are somewhat satisfied. In contrast, 60 percent of people making more than \$75,000 report being very satisfied with their community.

Satisfaction with Community's Quality of Life, by Household Income

Percentage

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied
Under \$25,000	37	42	10	10
\$25,000–\$50,000	44	46	6	4
\$50,000–\$75,000	52	38	8	3
Over \$75,000	60	31	5	3

Satisfaction with community quality of life is lowest among big-city dwellers, 24 percent of whom report being somewhat or very dissatisfied with their community. Suburban residents are the most satisfied with their community.

Satisfaction with Community's Quality of Life, by Size of Community

Percentage

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied
Rural	50	40	7	5
Small town	47	40	6	5
Suburbs	52	39	6	2
Medium-sized city	53	37	5	5
Big city	43	31	13	11

Americans Generally Think Community Quality of Life Will Remain the Same

About 63 percent of Americans expect the quality of life in their community to stay the same. However, a significant portion of the country—17 percent—thinks life in their community is getting worse. Nineteen percent thinks things are getting better. Baby boomers are the most pessimistic of all the generations, with 22 percent thinking things are getting worse and 17 percent thinking things are getting better. The oldest Americans expect no change in the status quo.

Impression of Trend of Quality of Life in the Community, by Generation

Percentage

	Better	Worse	Same
All adults	19	17	63
Gen Y	21	16	62
Gen X	21	18	60
Baby boomers	17	22	61
War babies/silent generation	16	10	72

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Jobs Are a Key Area of Dissatisfaction

In contrast with other categories, where Americans tend to report higher satisfaction levels, on quality and quantity of jobs, only about half of Americans say they are satisfied. Gen Yers are the most dissatisfied, followed by baby boomers.

Rural dwellers also tend to be dissatisfied with job quality and quantity, with 56 percent reporting dissatisfaction, compared with 40 percent of big-city dwellers. Fifty-five percent of Latinos are dissatisfied with the job situation in their community, as are 58 percent of African Americans. Among general feelings of satisfaction in other areas, job opportunities stand out as a key challenge.

Satisfaction with Quality and Quantity of Job Opportunities, by Generation

Percentage

	Satisfied	Dissatisfied
All adults	49	43
Gen Y	46	49
Gen X	56	41
Baby boomers	46	47
War babies/silent generation	50	26

Americans Are Fairly Satisfied with Their Home; Gen Y, Lower-Income People, Big-City Dwellers, and Renters Are Least Satisfied

Most Americans—89 percent, according to the survey—are fairly satisfied with their current home; 11 percent report dissatisfaction. However, for gen Yers, there is plenty of room for improvement: 20 percent indicate they are dissatisfied with their current home. Baby boomers follow, with 9 percent reporting dissatisfaction. The oldest Americans are the most content in their home: 96 percent say they are satisfied, and only 3 percent report dissatisfaction.

Satisfaction with Current Home, by Generation

Percentage

	Satisfied	Dissatisfied
All adults	89	11
Gen Y	80	20
Gen X	93	7
Baby boomers	91	9
War babies/silent generation	96	3

Lower-income Americans are the least satisfied with their current home. Eighteen percent of those making less than \$25,000, and 15 percent of those making \$25,000 to \$50,000, say they are dissatisfied with their home.

Satisfaction with Current Home, by Household Income

Percentage

	Satisfied	Dissatisfied
Under 25,000	81	18
\$25,000–\$50,000	84	15
\$50,000–\$75,000	93	6
Over \$75,000	95	5

When it comes to their home, big-city dwellers are also the least satisfied of Americans, with 19 percent reporting dissatisfaction. Rural dwellers are the most satisfied.

Satisfaction with Current Home, by Size of Community

Percentage

	Satisfied	Dissatisfied
Rural	93	7
Small town	91	9
Suburbs	90	10
Medium-sized city	86	13
Big city	81	19

There is also a large difference in satisfaction between owners and renters, with 22 percent of renters saying they are dissatisfied with their current home, compared with 5 percent of owners.

Satisfaction with Current Home, by Homeownership Status

Percentage

	Satisfied	Dissatisfied
Owners	95	5
Renters	78	22

Americans are Fairly Satisfied with Local Housing Options; Gen Y, Lower-Income People, Big-City Dwellers, and Renters Are Least Satisfied

When it comes to the range of housing types to choose from in communities, most Americans are fairly satisfied: 83 percent of the population reports satisfaction, and 15 percent reports dissatisfaction. Gen Yers are the least satisfied, with 21 percent indicating dissatisfaction with housing options.

Satisfaction with Local Housing Options, by Generation

Percentage

	Satisfied	Dissatisfied
All adults	83	15
Gen Y	76	21
Gen X	83	15
Baby boomers	84	14
War babies/silent generation	90	5

Lower-income Americans are the least satisfied with housing options in their community. Twenty percent of people making less than \$25,000, and 17 percent of those making \$25,000 to \$50,000, say they are dissatisfied with the range of housing types to choose from.

Satisfaction with Local Housing Options, by Household Income

Percentage

	Satisfied	Dissatisfied
Under \$25,000	76	20
\$25,000–\$50,000	82	17
\$50,000–\$75,000	85	13
Over \$75,000	88	10

Big-city dwellers are also the least satisfied of Americans with their housing options, with 21 percent reporting dissatisfaction. Of note: rural dwellers are also fairly dissatisfied.

Satisfaction with Local Housing Options, by Size of Community

Percentage

	Satisfied	Dissatisfied
Rural	82	17
Small town	83	16
Suburbs	89	9
Medium-sized city	82	13
Big city	76	21

A large difference also exists in satisfaction with housing options between owners and renters, with 20 percent of renters saying they are dissatisfied, compared with 11 percent of owners.

Satisfaction with Local Housing Options, by Owning and Renting

Percentage

	Satisfied	Dissatisfied
Owners	86	11
Renters	77	20

America in 2013

A ULI Survey of Views on
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and Community

Focus on Community Preferences by Generation

When it comes to their communities, what are Americans looking for? What do they value, and what do they see as important? What kind of community would they prefer to live in?

This fact sheet shares key findings about community preferences from “America in 2013,” a national survey conducted by Belden Russonello Strategists LLC on behalf of the ULI Terwilliger Center for Housing and the ULI Infrastructure Initiative.

Americans Place a High Value on Safety and Schools

When asked to rank certain community characteristics on a scale of 1 to 10, all generations place neighborhood safety and the quality of public schools at the top. (Of note: the importance of schools declines with the age of each generation, falling from 87 percent of gen Yers ranking it at the top to 68 percent of members of the oldest generations.)

Community Characteristic Importance Rankings, by Generation

Percentage ranking each characteristic 6 or higher in importance on a scale of 1 to 10

	All adults	Gen Y	Gen X	Baby boomers	War babies/ silent generation
Neighborhood safety	92	88	97	92	92
Quality of local public schools	79	87	82	74	68
Space between neighbors	72	69	79	70	70
Short distance to work or school	71	82	71	67	57
Distance to medical care	71	73	63	72	78
Walkability	70	76	67	67	69
Distance to shopping/entertainment	66	71	58	67	69
Distance to family/friends	63	69	57	60	66
Distance to parks/recreational areas	64	68	62	63	60
Convenience of public transportation	52	57	45	50	56

As shown in the table, gen Y expresses preferences that differ from those of the other generations in interesting ways. Gen Y is the least likely to value neighborhood safety or space between neighbors, but the most likely to want high-quality public schools, a short distance to work or school, walkability, and proximity to amenities like shopping and transit.

Members of generation X have less of a preference for urban living than do gen Yers, though being a short distance from work or school is important to them, matching the strength of preference for U.S. residents

Visit www.uli.org/communitysurvey to learn more about “America in 2013.”

as a whole. Compared with the U.S. average and with other generations, gen X has a strong preference for having more space between neighbors.

The rankings for baby boomers' preferences tend to mirror those of the nation as a whole, but baby boomers put less emphasis on schools and on being near work or school. America's oldest generations—war babies and the silent generation—place a high value on being close to medical care but do not care as much about being near work or school.

Compact Development: An Appeal That Cuts Across Generations

“America in 2013” found that more than half of Americans—representing nearly 127 million people—prefer a mix of community attributes typically associated with compact development. When asked to choose between tradeoff choices—living in a community with a mix of incomes or one with similar incomes, having available public transportation or not having it, among others—54 percent of Americans choose three or more of the five community attributes typically associated with compact development.

As shown in the table, preferences for compact development are stronger in some age cohorts than in others—the strongest being among gen Yers, followed by baby boomers. However, across all generations, about half of all Americans prefer a mix of community attributes traditionally associated with compact development.

Community Attribute Preferences, by Generation

Percentage preferring to live in a community with these attributes

	All adults	Gen Y	Gen X	Baby boomers	War babies/silent generation
Shorter commute/smaller home	61	54	54	72	65
Proximity to mix of shops, restaurants, and offices	53	62	50	49	51
Mix of incomes	52	52	53	53	47
Public transportation options	51	55	45	52	48
Mix of homes	48	59	47	42	44
<i>Percentage choosing three or more of these compact development attributes</i>	54	59	49	57	51

For Older Americans, the Appeal of a Shorter Commute Is Strong

As shown in the table, among older Americans, many of whom have spent substantial time in the workforce and may continue working beyond the traditional retirement age, the preference for a shorter commute is very strong, even if it means living in a smaller home. Seventy-two percent of baby boomers, or nearly 53 million people, would make that tradeoff.

Similarly, 65 percent of war babies and members of the silent generation—nearly 23 million people—would trade a larger home for a shorter commute. Almost 51 percent of these older Americans (representing 18 million people) also show a slight preference for living in areas close to a mix of shops, restaurants, and offices, reinforcing their preference, particularly as they age, for walkable communities near amenities.

Gen Y Is Focused on Access and Convenience in Compact, Diverse Communities

Among gen Yers, 54 percent—representing nearly 39 million people—would trade a larger home for a shorter commute. Among all generations, gen Y is the most attracted to living in a neighborhood close to a mix of shops, restaurants, and offices. Sixty-two percent of gen Yers (representing more than 44 million people) prefer this type of mixed-use community over one where shops, restaurants, and offices are farther away.

Gen Y is also the only age cohort that shows a preference for living in a neighborhood where there is a mix of housing types. Fifty-nine percent of gen Yers—representing more than 42 million people—would like to live in a community where there is a range of housing. Similarly, 52 percent of gen Yers (representing more than 37 million people) would like to live in a community where there is a range of incomes.

Urban, Compact Living Least Likely to Appeal to Gen X

Gen Xers are the least likely to find community attributes associated with compact development appealing. Despite this, 49 percent prefer three or more of the community attributes associated with compact development. Fifty-three percent of gen Xers value income diversity, and 50 percent would like to be close to a mix of shops, restaurants, and offices.



Focus on Movers

How many Americans are planning to change homes in the next five years? And what are likely movers looking for in the communities they are moving to? Who has moved recently, and did they move to a bigger home or downsize? This fact sheet shares key findings from “America in 2013” about likely and recent movers.

“America in 2013” is a national survey conducted by Belden Russonello Strategists LLC on behalf of the ULI Terwilliger Center for Housing and the ULI Infrastructure Initiative.

Many Americans Plan to Move in the Next Five Years; Gen Yers Are the Most Likely to Move

Many Americans report that they are likely to change homes during the next five years. “America in 2013” found that 42 percent of Americans—representing 98 million people—are likely movers. Making up that 42 percent are 25 percent who are very likely to move and 17 percent who are somewhat likely. Gen Yers are the most likely to move: 63 percent say they expect to move during the next five years. America’s oldest generations are the least likely to move.

Likelihood of Moving, by Generation

Percentage

	Likely to move	Not likely to move
All adults	42	57
Gen Y	63	36
Gen X	41	59
Baby boomers	31	68
War babies/silent generation	22	76

Lower-income people are more likely to move than those with higher incomes. Fifty-one percent of the people making less than \$25,000 report that they are likely to move in the next five years, compared with 43 percent of those making more than \$75,000.

Likelihood of Moving, by Household Income

Percentage

	Likely to move	Not likely to move
Under \$25,000	51	47
\$25,000–\$50,000	40	59
\$50,000–\$75,000	34	66
Over \$75,000	43	57

Most Movers Expect to Own Their New Home; Gen Yers and Older Americans Are More Likely to Expect to Rent

Most movers—73 percent—believe they will own the primary residence they move into; one-quarter expect to rent. Gen Yers and the oldest Americans are the most likely to expect to rent their new home, and gen Xers are the least likely to expect to rent. Just 20 percent of the baby boomers expect to rent.

Movers' Expected Homeowner Status, by Generation

Percentage

	Expect to own	Expect to rent
All adults	73	25
Gen Y	69	31
Gen X	81	16
Baby boomers	79	20
War babies/silent generation	55	36

Most Prospective Movers Want Single-Family Homes, but Some Desire Other Housing Types

Sixty-five percent of Americans who are moving expect to move into a single-family home. However, 15 percent of movers expect to move to an apartment, and 14 percent expect to move to a duplex, townhouse, or rowhouse. Gen Yers are especially likely to expect to live in an apartment or duplex, townhouse, or rowhouse. Of note: baby boomers are the most likely to expect to live in a manufactured/mobile home.

Most movers in generation X—87 percent—expect to live in a single-family home. For the oldest generations, 30 percent of movers expect to move to apartments or compact homes like townhouses or rowhouses.

Movers' Expected Type of Home, by Generation

Percentage

	Single-family home	Apartment	Duplex, townhouse, rowhouse	Manufactured/mobile home
All adults	65	15	14	2
Gen Y	60	21	17	1
Gen X	87	6	4	1
Baby boomers	65	11	16	6
War babies/silent generation	58	17	13	—

Movers See Themselves in All Different Kinds of Communities

American movers are headed to many different kinds of communities. In fact, likely movers are roughly evenly split among wanting rural, small-town, suburban, and medium- or big-city life. Gen Yers have a stronger preference for big cities than do other generations, and baby boomers feel the pull of rural settings.

Desired Size of Community among Likely Movers, by Generation

	Rural	Small town	Suburbs	Medium-sized city	Big city
All adults	18	23	21	17	16
Gen Y	16	21	20	17	21
Gen X	19	21	25	19	12
Baby boomers	25	28	15	14	10
War babies/silent generation	7	25	27	17	12

America Is a Nation on the Move: About One-Third of the Population Has Changed Homes in the Past Five Years

Thirty-two percent of Americans have moved in the past five years. More than half of the gen Yers report moving, and 31 percent of gen Xers have moved. Baby boomers and the oldest Americans are the least likely to have moved.

Recent Moving History, by Generation

Percentage stating they had moved in the past five years

	Yes	No
All adults	32	67
Gen Y	53	47
Gen X	31	69
Baby boomers	20	80
War babies/silent generation	19	80

Big-city dwellers are the most likely to have moved recently: half of big city residents report moving in the past five years. Rural dwellers are the most stable, with only 24 percent reporting moving recently. Twenty-eight percent of residents of medium-sized cities have recently moved.

Recent Moving History, by Size of Community

Percentage stating they had moved in the past five years

	Yes	No
Rural	25	74
Small town	32	68
Suburbs	30	70
Medium-sized city	28	72
Big city	50	50

About Half of Recent Movers Moved into a Bigger Home; Older Americans Are Likely to Have Downsized

About half the people who report moving within the past five years say they moved into a house that is larger than their old one. About a quarter of recent movers say their new home is the same size as their previous one, and 27 percent say it is smaller. Gen Xers are most likely to have moved into a larger home.

Baby boomers and war babies/members of the silent generation are the most likely to have downsized in their most recent move. In fact, 50 percent of the oldest Americans report that their new home is smaller than their old one. One-third of baby boomers report moving into a smaller home, and 44 percent say they have moved into a larger home.

Recent Change in Home Size, by Generation

Percentage

	Larger	Smaller	Same
All adults	48	27	25
Gen Y	48	25	27
Gen X	59	20	20
Baby boomers	44	33	22
War babies/silent generation	24	50	25

America in 2013

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Focus on Owning and Renting

How many Americans own their homes, and how many rent? What do Americans think about homeownership as an investment? This fact sheet shares key findings from “America in 2013” about owning and renting.

“America in 2013” is a national survey conducted by Belden Russonello Strategists LLC on behalf of the ULI Terwilliger Center for Housing and the ULI Infrastructure Initiative.

Two-Thirds of Americans Own Their Home; Baby Boomers Are Most Likely to Own, Gen Y to Rent

America is a nation of homeowners. Survey responses indicate that 66 percent of Americans own their home and 32 percent are renters. Gen Yers are the least likely to own their home: over half—54 percent—currently rent and 40 percent own. Baby boomers are the most likely to own a home, with 80 percent reporting that they own their primary residence.

Current Homeownership Status, by Generation

Percentage

	Own	Rent
All adults	66	32
Gen Y	40	54
Gen X	78	22
Baby boomers	80	20
War babies/silent generation	74	26

Most People See Homeownership as a Good Investment, but Many Older Americans Don't See It That Way

Despite recent upheavals in the housing market, most Americans still believe that buying a home is a good investment for them. That sentiment is strongest among members of generation X. Interestingly, the oldest Americans are the most skeptical of homeownership, with 40 percent of war babies/members of the silent generation saying homeownership was not so good of an investment for them.

Views on Buying a Home as an Investment, by Generation

Percentage

	A good investment	A not-so-good investment
All adults	71	27
Gen Y	72	27
Gen X	79	20
Baby boomers	73	27
War babies/silent generation	55	40

Visit www.uli.org/communitysurvey to learn more about “America in 2013.”

Renters Are Also Skeptical of Homeownership

Renters are also quite skeptical of homeownership as an investment, with a surprising 42 percent of renters saying that buying a home was not a good investment for them.

Views on Buying a Home as an Investment, by Homeownership Status

Percentage	A good investment	A not-so-good investment
Owners	79	19
Renters	56	42

Homeownership Varies with Size of Community and Income

Rural dwellers are the most likely to own their own home, and big-city dwellers the least likely to own. In fact, homeownership declines in a relatively linear way as the size of community rises. Fifty-three percent of big-city dwellers rent, compared with 12 percent of rural residents.

Current Homeownership Status, by Size of Community

Percentage	Own	Rent
Rural	86	12
Small town	66	32
Suburbs	71	28
Medium-sized city	59	38
Big city	46	53

Lower-income Americans are also less likely to own their homes. Homeownership increases with income level.

Current Homeownership Status, by Income

Percentage	Own	Rent
Under \$25,000	40	56
\$25,000–\$50,000	54	44
\$50,000–\$75,000	81	19
Over \$75,000	85	14

Owners and Renters Express Preferences for Many of the Same Community Attributes

When it comes to community attributes, owners and renters express very similar preferences in some cases, but different preferences in others. Owners and renters have similar preferences when it comes to being in a community with a mix of incomes; they also express a similar willingness to trade a longer commute and a larger home for a shorter commute and a smaller home.

Renters are much more likely than owners to want public transportation options; they are also more likely to want to be in a community with a mix of homes, as well as one that is close to shops, restaurants, and offices.

Community Attribute Preferences, by Homeownership Status

Percentage preferring listed attribute

	Owners	Renters
Shorter commute/smaller home	63	56
Close to mix of shops, restaurants, and offices	49	60
Mix of incomes	50	53
Public transportation options	44	62
Mix of homes	43	57

Owners and Renters Place Similar Importance on Most Community Characteristics; Renters Are More Likely to Place High Importance on Public Transportation

When asked to rank certain community characteristics on a scale of 1 to 10, owners and renters place about the same emphasis on most characteristics.

In only three categories is the difference between the rankings by owners and renters more than 10 percentage points. Renters are much more likely than owners to rank convenient public transportation as a high priority. Renters are also more likely to highly value being a short distance from both family and friends and work or school.

Importance of Community Characteristics, by Homeownership Status

Percentage ranking each characteristic 6 or higher in importance on a scale of 1 to 10

	Owners	Renters
Neighborhood safety	94	88
Quality of local public schools	77	83
Space between neighbors	75	68
Short distance to work or school	66	76
Distance to medical care	68	65
Walkability	75	79
Distance to shopping/entertainment	63	71
Distance to family/friends	59	70
Distance to parks/recreational areas	63	64
Convenience of public transportation	44	67

Most Movers Expect to Own Their Homes; Gen Yers and Older Americans Are More Likely to Expect to Rent

Most people changing homes—73 percent—believe they will own the primary residence they move into, whereas just 25 percent expect to rent. Gen Yers and the oldest Americans are the most likely to expect to rent their new home after moving. Gen Xers are the least likely to expect to rent, and just 20 percent of baby boomers expect to rent.

Movers' Expected Homeownership Status, by Generation

Percentage

	Expect to own	Expect to rent
All adults	73	25
Gen Y	69	31
Gen X	81	16
Baby boomers	79	20
War babies/silent generation	55	36