

America in 2013

Key Findings on Housing,
Community, Transportation,
and the Generations

sorelle

sorelle

BAKERY • CAFE

sorelle

P

©ANTON GRASS/ISTO



Urban Land
Institute

Infrastructure Initiative



Urban Land
Institute

Terwilliger Center for Housing

Table of Contents

About Us

Focus on Housing and Community

- Focus on Community Satisfaction
- Focus on Community Preferences by Generation
- Focus on Movers
- Focus on Owning and Renting

Focus on Transportation

- Focus on Transportation Satisfaction
- Focus on Transportation Preferences
- Focus on Transportation Habits
- Focus on Commuting
- Focus on Public Transportation

Focus on the Generations

- Focus on War Babies and the Silent Generation
- Focus on the Baby Boomer Generation
- Focus on Generation X
- Focus on Generation Y

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.

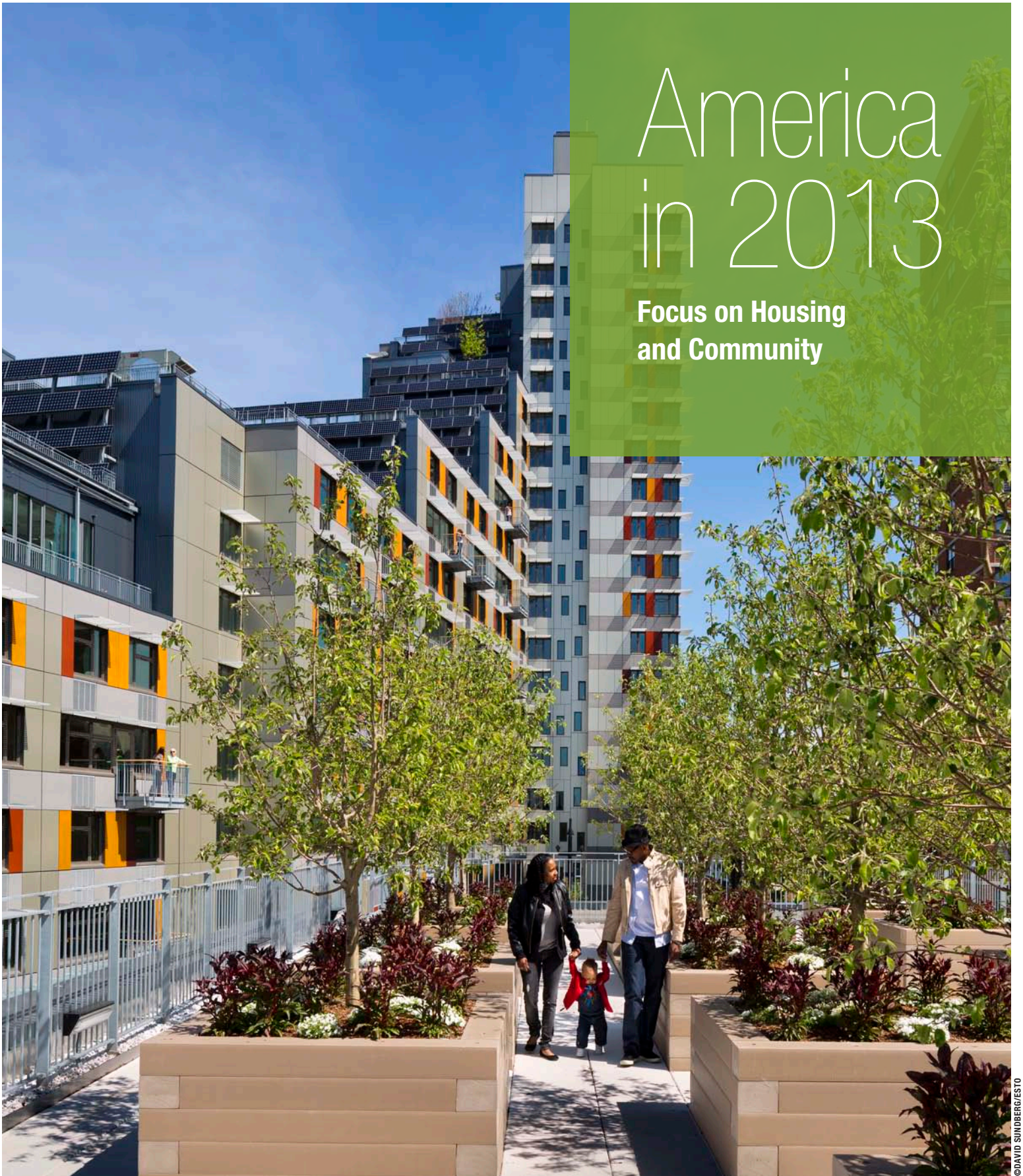


ULI's Terwilliger Center for Housing engages in a multifaceted program of work that furthers the development of mixed-income, mixed-use communities with a full spectrum of housing affordable to all, a critical aspect of ULI's core mission of "providing leadership in the responsible use of land."

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

America in 2013

Focus on Housing
and Community



©DAVID SUNDBERG/ESTO



Urban Land
Institute

Infrastructure Initiative



Urban Land
Institute

Terwilliger Center for Housing

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 |

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
Housing, Transportation,
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

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

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 |

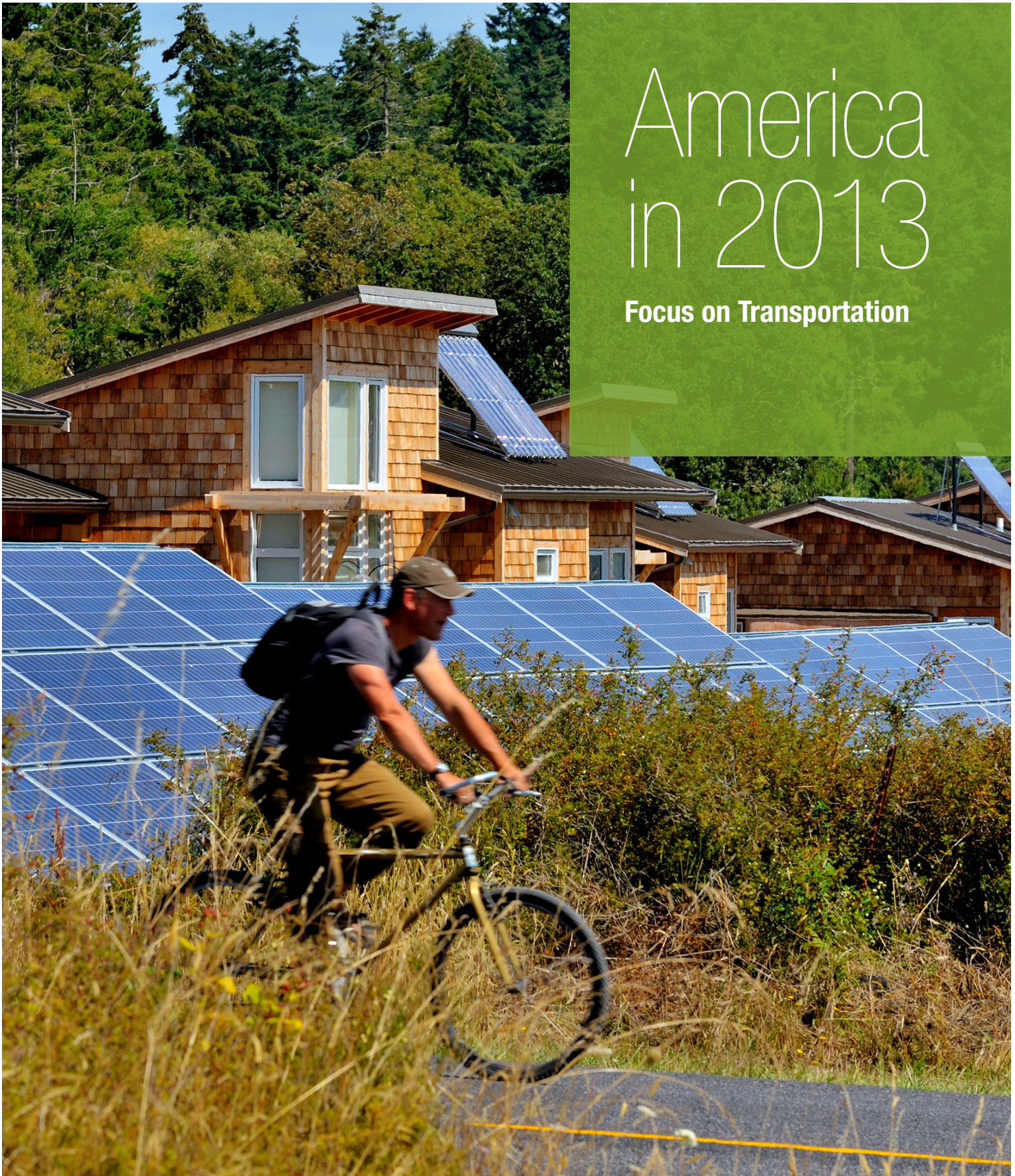
Most Movers Expect to Own Their Homes; Gen Yers and Older Americans Are More Likely to Expect to Rent

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 |



America in 2013

Focus on Transportation



**Urban Land
Institute**

Infrastructure Initiative



**Urban Land
Institute**

Terwilliger Center for Housing



Focus on Transportation Satisfaction

How satisfied are Americans with their transportation system? This fact sheet shares key findings about transportation satisfaction from “America in 2013.”

“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.

Americans Are Generally Satisfied with Transportation Options; Baby Boomers and Rural Dwellers Are Least Satisfied

Seventy-two percent of Americans are satisfied with the range of transportation options available in their community. Baby boomers report the least satisfaction, with only 68 percent saying they are satisfied and 29 percent indicating dissatisfaction.

Satisfaction with Range of Transportation Options Available, by Generation

Percentage

| | Satisfied | Dissatisfied |
|------------------------------|-----------|--------------|
| All adults | 72 | 25 |
| Gen Y | 73 | 25 |
| Gen X | 73 | 24 |
| Baby boomers | 68 | 29 |
| War babies/silent generation | 72 | 17 |

Evaluated by community type, the survey results show rural residents are the least satisfied with the transportation options available, with 31 percent expressing dissatisfaction. In fact, satisfaction with transportation options increases by size of community, with 79 percent of big-city dwellers indicating they are satisfied with their transportation options and only 18 percent expressing dissatisfaction.

Satisfaction with Range of Transportation Options Available, by Size of Community

Percentage

| | Satisfied | Dissatisfied |
|-------------------|-----------|--------------|
| Rural | 65 | 31 |
| Small town | 70 | 27 |
| Suburbs | 71 | 23 |
| Medium-sized city | 77 | 20 |
| Big city | 79 | 18 |

Americans Are Generally Satisfied with Sidewalks

Most Americans are satisfied with the quality of the sidewalks in their community. Older Americans are most satisfied, and gen Yers are least satisfied.

Satisfaction with Sidewalks, by Generation

| Percentage | Satisfied | Dissatisfied |
|------------------------------|-----------|--------------|
| All adults | 71 | 23 |
| Gen Y | 70 | 25 |
| Gen X | 72 | 21 |
| Baby boomers | 71 | 23 |
| War babies/silent generation | 75 | 19 |

If They Have Access to It, Americans Are Satisfied with Public Transportation

But how satisfied are Americans with public transportation? Among those who have access to transit, satisfaction is high. Seventy-five percent of Americans are satisfied with the transit they have, although satisfaction levels are somewhat lower among older Americans.

Satisfaction with Public Transit among Those with Access, by Generation

| Percentage | Satisfied | Dissatisfied |
|------------------------------|-----------|--------------|
| All adults | 75 | 17 |
| Gen Y | 75 | 19 |
| Gen X | 76 | 19 |
| Baby boomers | 76 | 17 |
| War babies/silent generation | 72 | 9 |

More Than Half of Americans without Transit Are Dissatisfied with That Condition

Fifty-one percent of Americans who do not have access to transit are dissatisfied with that situation. That is, among the 30 percent of Americans who do not have access to transit, over half wish they did. Dissatisfaction is strongest among baby boomers, followed by gen Yers.

Satisfaction with Availability of Public Transit among Those without Access, by Generation

| Percentage | Satisfied | Dissatisfied |
|------------------------------|-----------|--------------|
| All adults | 43 | 51 |
| Gen Y | 48 | 48 |
| Gen X | 39 | 54 |
| Baby boomers | 38 | 57 |
| War babies/silent generation | 52 | 36 |



Focus on Transportation Preferences

What do Americans want from their transportation system? This fact sheet shares key findings about transportation preferences from “America in 2013.”

“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.

When Choosing a New Community, Most Americans Think Walkability and Transit Are Important

“America in 2013” asked respondents to rank, on a scale from 1 to 10 with 10 being the highest, how important various community attributes would be to them if they were moving in the next five years. Overwhelmingly, Americans want walkable communities. A preference for walkability is especially strong among gen Yers, 76 percent of whom give walkability a score of 6 or higher.

Respondents representing over half of Americans, 52 percent, give public transportation a score of 6 or higher. Convenient public transportation is least likely to be important to members of gen X, but is important to many gen Yers, as well as to war babies/members of the silent generation.

Importance Rankings for Walkability and Public Transportation, by Generation

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

| | Walkability | Convenient public transportation |
|------------------------------|-------------|----------------------------------|
| All adults | 70 | 52 |
| Gen Y | 76 | 57 |
| Gen X | 67 | 45 |
| Baby boomers | 67 | 50 |
| War babies/silent generation | 69 | 56 |

Public Transit Is a Meaningful Community Attribute to a Majority of Americans

“America in 2013” also asked respondents to indicate if they preferred public transportation, or if it did not matter. Strength of preference for public transportation varies across the generations, and is strongest among gen Yers. However, even among the group with the weakest preference for transit, war babies/the silent generation, nearly half, 48 percent, would prefer to live in a community that has public transit they can use.

Preferences for Public Transportation, by Generation

Percentage

| | Prefer public transportation options | Public transportation options do not matter |
|------------------------------|--------------------------------------|---|
| All adults | 51 | 49 |
| Gen Y | 55 | 45 |
| Gen X | 45 | 55 |
| Baby boomers | 52 | 48 |
| War babies/silent generation | 48 | 52 |

Americans Want to Be Close to It All

Americans want to be close to work, school, and other destinations like shopping and entertainment, as well as family and friends. Gen Yers, especially, place high importance on all aspects of proximity. For older Americans, being close to medical care is a particularly important consideration.

Importance Rankings for Distance, by Generation

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

| | Work or school | Medical care | Shopping or entertainment | Family or friends |
|------------------------------|----------------|--------------|---------------------------|-------------------|
| All adults | 71 | 71 | 66 | 63 |
| Gen Y | 82 | 73 | 71 | 69 |
| Gen X | 71 | 63 | 58 | 57 |
| Baby boomers | 67 | 72 | 67 | 60 |
| War babies/silent generation | 57 | 78 | 69 | 66 |

America in 2013

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

Focus on Transportation Habits

How do Americans use their transportation systems? This fact sheet shares key findings from “America in 2013” about transportation by mode.

“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.

Americans Use a Variety of Transportation Modes to Get Around

Americans are frequent drivers, but they also regularly walk, bike, and use transit to get to their destinations. While 91 percent of Americans go somewhere by motor vehicle at least once a week, 44 percent walk to a destination once a week or more. That makes walking the most important mode of transportation after driving. Eleven percent of Americans take public transit as frequently as once a week. Though few Americans are daily bike riders, 12 percent report biking weekly, and another 12 percent use a bicycle at least once a month.

Frequency of Use, by Transportation Mode

Percentage

| | Nearly every day | At least once a week | At least once a month | Less than once a month or never |
|---|---------------------|-------------------------|--------------------------|---------------------------------------|
| Go somewhere by car, truck, or motorcycle | 77 | 14 | 3 | 5 |
| Take public transit | 6 | 5 | 7 | 80 |
| Walk several blocks or more to a destination | 22 | 22 | 10 | 46 |
| Ride a bicycle | 2 | 12 | 12 | 74 |

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

Most Americans Drive Daily, Especially Gen Xers

Generation X is the most likely to drive on a daily basis, and older Americans are the least likely to do so. Eight percent of the oldest Americans report that they do not drive much at all, and 28 percent say they drive about monthly. About 3 percent of gen Xers say they do not drive much either.

Frequency of Travel by Car, Truck, or Motorcycle, by Generation

Percentage

| | Nearly every day | At least once a week | At least once a month | Less than once a month or never |
|------------------------------|------------------|----------------------|-----------------------|---------------------------------|
| All adults | 77 | 14 | 3 | 5 |
| Gen Y | 79 | 11 | 4 | 7 |
| Gen X | 89 | 6 | 2 | 3 |
| Baby boomers | 78 | 16 | 2 | 4 |
| War babies/silent generation | 57 | 28 | 28 | 8 |

Next Comes Walking

Second only to driving, walking to a destination is a frequent habit of Americans, with 44 percent reporting that they walk to a destination daily or weekly. However, 46 percent report that they never walk several blocks or more to a destination.

The percentages of people walking to a destination at least weekly is relatively consistent across the generations, with 47 percent of gen Yers saying they do so, along with 46 percent of gen Xers and 43 percent of baby boomers. Only the oldest Americans—war babies and members of the silent generation—tend to be less active than that.

Frequency of Walking Several Blocks or More to a Destination, by Generation

Percentage

| | Nearly every day | At least once a week | At least once a month | Less than once a month or never |
|------------------------------|------------------|----------------------|-----------------------|---------------------------------|
| All adults | 22 | 22 | 10 | 46 |
| Gen Y | 23 | 24 | 11 | 43 |
| Gen X | 19 | 27 | 11 | 42 |
| Baby boomers | 24 | 19 | 11 | 46 |
| War babies/silent generation | 17 | 14 | 7 | 61 |

Then Comes Transit, Which Many Americans Use Frequently

Eleven percent of those surveyed report using transit on a daily or weekly basis. Transit use is especially high among gen Yers, 29 percent of whom report using transit at least once a month. Older Americans are the least frequent users of public transit.

Frequency of Transit Use, by Generation

Percentage

| | Nearly every day | At least once a week | At least once a month | Less than once a month or never |
|------------------------------|------------------|----------------------|-----------------------|---------------------------------|
| All adults | 6 | 5 | 7 | 80 |
| Gen Y | 10 | 10 | 9 | 71 |
| Gen X | 4 | 3 | 9 | 84 |
| Baby boomers | 6 | 4 | 5 | 83 |
| War babies/silent generation | 2 | 2 | 8 | 87 |

Mode Use Varies by Type and Size of Community

How people get around correlates with the nature of the community in which they live. Residents of big cities employ more modes of transportation more frequently, taking transit and walking more than people living in less-populated places. Rural residents and suburbanites drive the most. Of note: rural residents are frequent bikers, with 2 percent biking daily and another 17 percent biking at least once a week. People who live in medium-sized cities also embrace several transportation modes and are both frequent transit users and walkers.

Public transit use is most common among big-city residents, 34 percent of whom use transit nearly every day or at least once a week—with 19 percent using it almost daily.

Frequency of Mode Use, by Size of Community

Percentage using each mode nearly every day or at least once a week

| | Drive | Take transit | Walk | Bike |
|-------------------|-------|--------------|------|------|
| Rural | 96 | 2 | 31 | 19 |
| Small town | 90 | 8 | 42 | 12 |
| Suburbs | 96 | 8 | 37 | 15 |
| Medium-sized city | 94 | 14 | 49 | 12 |
| Big city | 79 | 34 | 59 | 15 |

America in 2013

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

Focus on Commuting

How do Americans commute, and how does this behavior differ by generation and by location? This fact sheet shares key findings from “America in 2013” about commuting behavior.

“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 Commute to Work or School

Sixty-three percent of Americans commute to work or school three or more days a week. Members of generation Y are the most likely to commute to work or school, followed by gen Xers and then baby boomers. About 8 percent of older Americans commute three days a week or more. The percentages of those who report commuting vary by gender—71 percent of men and 57 percent of women.

Commuting, by Generation

Percentage commuting three or more days per week

| | |
|------------------------------|-----------|
| All adults | 63 |
| Gen Y | 86 |
| Gen X | 80 |
| Baby boomers | 58 |
| War babies/silent generation | 8 |

Transit Is Heavily Used for Commuting by Gen Y, Big-City Dwellers, and People with Low Incomes

The survey found that 85 percent of Americans commute by car on most days. Eleven percent of the population usually commutes by public transit, and about 5 percent walks or bikes. Eighteen percent of gen Yers take transit, making them the most likely of all the generations to do so. Nine percent of baby boomers are also regular transit users.

Commuting Behavior, by Generation

Percentage using particular transportation mode

| | Car | Public transit | Walk or bike |
|------------------------------|------------|-----------------------|---------------------|
| All adults | 85 | 11 | 5 |
| Gen Y | 77 | 18 | 7 |
| Gen X | 92 | 4 | 5 |
| Baby boomers | 90 | 9 | 2 |
| War babies/silent generation | 91 | 3 | 6 |

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

By community size, 32 percent of big-city residents say they commute by transit most of the time, whereas 10 percent of suburban dwellers do so. Big-city residents are also more likely to walk or bike to work.

Commuting Behavior, by Community Size

| Percentage using particular transportation mode | Car | Public transit | Walk or bike |
|---|-----|----------------|--------------|
| Rural | 95 | 3 | 1 |
| Small town | 89 | 8 | 3 |
| Suburbs | 90 | 10 | 3 |
| Medium-sized city | 91 | 7 | 9 |
| Big city | 57 | 32 | 11 |

The likelihood of commuting by automobile increases with income, with 94 percent of Americans who make \$75,000 or more reporting that they mostly commute by car. Lower-income Americans are most likely to use public transit to commute (24 percent), and to walk or bike to work or school (15 percent).

Commuting Behavior, by Household Income

| Percentage using particular transportation mode | Car | Public transit | Walk or bike |
|---|-----|----------------|--------------|
| Under \$25,000 | 68 | 24 | 15 |
| \$25,000–\$50,000 | 83 | 15 | 3 |
| \$50,000–\$75,000 | 92 | 3 | 4 |
| Over \$75,000 | 94 | 4 | 2 |

Public Transit Users Have the Longest Commute

More than one-third of Americans, 36 percent, have a commute that is over half an hour. Another 36 percent spend 15 to 29 minutes per day on their commute, and a lucky 27 percent have a commute that takes less than a quarter of an hour.

Public transit users have the longest commute among all commuters, with over half having a commute of 45 minutes or more. Forty-two percent of bikers or walkers have commutes that take less than 15 minutes.

Length of Commute, by Commute Type

| Percentage reporting respective commute time | 0–14 minutes | 15–29 minutes | 30–44 minutes | 45-plus minutes |
|--|--------------|---------------|---------------|-----------------|
| All commutes | 27 | 36 | 20 | 16 |
| Public transit | 13 | 16 | 16 | 51 |
| Car | 28 | 38 | 20 | 4 |
| Biking/walking | 42 | 33 | 21 | 4 |

More Than Half Would Accept a Smaller Home in Exchange for a Shorter Commute

Sixty-one percent of Americans say they would prefer a commute shorter than 45 minutes, even if it meant living in a smaller home. The other 39 percent say they would prefer the larger home even if meant a long commute. Baby boomers are especially willing to give up a large home for a short commute: 72 percent prefer that option, higher than for any other generation.

Smaller Home/Shorter Commute versus Bigger Home/Longer Commute, by Generation

Percentage preferring listed option

| | Smaller home/ shorter commute | Bigger home/ longer commute |
|------------------------------|----------------------------------|--------------------------------|
| All adults | 61 | 39 |
| Gen Y | 54 | 36 |
| Gen X | 54 | 36 |
| Baby boomers | 72 | 28 |
| War babies/silent generation | 65 | 35 |



Focus on Public Transportation

When it comes to public transportation or transit, what do Americans think and do? This fact sheet shares key findings from “America in 2013” about public transportation.

“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.

Public Transit Is a Meaningful Community Attribute to a Majority of Americans

The survey asked several questions to illuminate how people feel about public transit. About half of Americans think convenient public transportation is a meaningful community attribute. The strength of that preference varies across the generations and is strongest among members of generation Y. However, even among the group with the weakest preference for transit, war babies/members of the silent generation, nearly half the respondents—48 percent—would prefer to live in a community that has public transit they can use.

Preferences for Public Transportation, by Generation

Percentage

| | Prefer public transportation options | Public transportation options do not matter |
|------------------------------|--------------------------------------|---|
| All adults | 51 | 49 |
| Gen Y | 55 | 44 |
| Gen X | 45 | 55 |
| Baby boomers | 52 | 48 |
| War babies/silent generation | 48 | 50 |

Americans Place a Lot of Importance on Public Transportation

“America in 2013” asked respondents to rank on a scale from 1 to 10, with 10 being the highest, how important public transportation would be to them in choosing a community if they were moving. Over half of Americans, 52 percent, give public transportation a score of 6 or higher. Convenient public transportation is least likely to be important to gen Xers, but is important to many gen Yers, as well as to war babies/members of the silent generation.

Importance Rankings for Public Transportation, by Generation

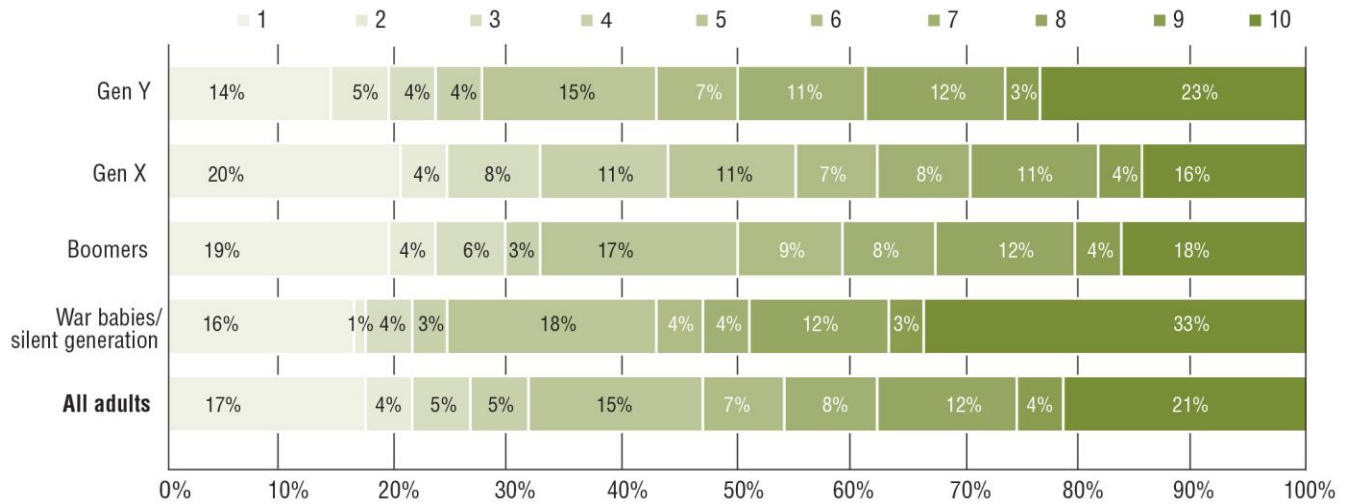
Percentage giving listed ranking on a scale of 1 to 10, with 10 being highest

| | 1 to 5 | 6 to 10 |
|------------------------------|-----------|-----------|
| All adults | 46 | 52 |
| Gen Y | 42 | 56 |
| Gen X | 54 | 46 |
| Baby boomers | 49 | 51 |
| War babies/silent generation | 42 | 56 |

Of note, as shown in the figure below, older Americans indicate the highest strength of preference on this question: 33 percent of war babies/members of the silent generation give public transportation a ranking of 10, more than any other demographic group.

Detailed Look at Importance Rankings for Public Transportation, by Generation

Percentage giving indicated numerical ranking



Public Transportation Is Widely Available to Americans, but Access Varies Widely by Size of Community

Most Americans have access to public transit in their community. Gen Yers report the highest level of access and older Americans the lowest.

Public Transit Availability, by Generation

Percentage

| | Available | Not available |
|------------------------------|-----------|---------------|
| All adults | 69 | 30 |
| Gen Y | 81 | 18 |
| Gen X | 63 | 37 |
| Baby boomers | 63 | 36 |
| War babies/silent generation | 65 | 35 |

Although transit access is high across the population and generations, rural areas report the lowest level of availability. Most big-city residents have access to transit, and nearly three-quarters of suburban dwellers also report having transit available.

Public Transit Availability, by Size of Community

| Percentage | Available | Not available |
|-------------------|-----------|---------------|
| Rural | 23 | 76 |
| Small town | 66 | 33 |
| Suburbs | 74 | 25 |
| Medium-sized city | 90 | 10 |
| Big city | 95 | 4 |

Americans Generally Are Satisfied with Public Transportation—If They Have It

But how satisfied are Americans with public transportation? Among those who have access to transit, satisfaction levels are high. Overall, 75 percent of Americans say they are satisfied with the transit they have, although satisfaction levels are somewhat lower among older Americans.

Satisfaction with Public Transit among Those Who Have Access to It, by Generation

| Percentage | Satisfied | Dissatisfied |
|------------------------------|-----------|--------------|
| All adults | 75 | 17 |
| Gen Y | 75 | 19 |
| Gen X | 76 | 19 |
| Baby boomers | 76 | 17 |
| War babies/silent generation | 72 | 9 |

More Than Half of Americans without Transit Are Dissatisfied with That Condition

However, among those without access to transit, 51 percent are dissatisfied with that situation. That is, of the 30 percent of Americans who do not have access to transit, over half wish they did. Dissatisfaction is strongest among baby boomers, followed by gen Xers.

Satisfaction with Availability of Public Transit among Those without Access, by Generation

| Percentage | Satisfied | Dissatisfied |
|------------------------------|-----------|--------------|
| All adults | 43 | 51 |
| Gen Y | 48 | 48 |
| Gen X | 39 | 54 |
| Baby boomers | 38 | 57 |
| War babies/silent generation | 52 | 36 |

Many Americans—Especially Those in Cities—Report Being Frequent Users of Public Transit

Although driving is the dominant mode of transportation in the United States, 11 percent of Americans use transit on a daily or weekly basis. Transit use is especially high among gen Yers, 29 percent of whom report using transit at least once a month or more. Older Americans are the least frequent users of public transit.

Frequency of Transit Use, by Generation

Percentage

| | Nearly every day | At least once a week | At least once a month | Less than once a week, or never |
|------------------------------|------------------|----------------------|-----------------------|---------------------------------|
| All adults | 6 | 5 | 7 | 80 |
| Gen Y | 10 | 10 | 9 | 71 |
| Gen X | 4 | 3 | 9 | 84 |
| Baby boomers | 6 | 4 | 5 | 83 |
| War babies/silent generation | 2 | 2 | 8 | 87 |

Use of public transit is most common among those living in big cities, 19 percent of whom report using transit daily, with another 15 percent using transit once a week.

Frequency of Transit Use, by Size of Community

Percentage

| | Nearly every day | At least once a week | At least once a month | Less than once a week, or never |
|-------------------|------------------|----------------------|-----------------------|---------------------------------|
| Rural | 2 | — | 3 | 94 |
| Small town | 4 | 4 | 8 | 84 |
| Suburbs | 6 | 2 | 8 | 83 |
| Medium-sized city | 6 | 8 | 9 | 76 |
| Big city | 19 | 15 | 9 | 57 |

America in 2013

Focus on the Generations



**Urban Land
Institute**

Infrastructure Initiative



**Urban Land
Institute**

Terwilliger Center for Housing



Focus on War Babies and the Silent Generation

What do America's oldest residents desire when it comes to housing, transportation, and community choices? This fact sheet shares key findings from "America in 2013" about the war babies and the silent generation.

"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.

The Oldest Generations Share Similar Attitudes on Housing, Transportation, and Community Choices

The silent generation, born before 1931, and war babies, born between 1932 and 1946, are the smallest generations in America in numbers. Combined, the war babies (currently age 67 to 82) and members of the silent generation (age 83 and older) account for 35 million people. These generations hold very similar attitudes on community preferences and have been combined for this analysis.

War babies and the silent generation are among the *least* affluent of America's generations: 49 percent of members of these generations earn less than \$50,000 a year, and many live on a fixed income. A number of other characteristics set members of these generations apart from their younger counterparts: 61 percent are women, compared with 52 percent of the overall population, and 41 percent live alone, compared with 17 percent of Americans overall.

Ethnicity, War Babies/Silent Generation versus All Adults

Percentage

| | War babies/silent generation | All adults |
|------------------|------------------------------|------------|
| White | 80 | 69 |
| Latino | 9 | 13 |
| African American | 6 | 12 |

Household Income, War Babies/Silent Generation versus All Adults

Percentage

| | War babies/silent generation | All adults |
|-------------------|------------------------------|------------|
| Under \$25,000 | 23 | 21 |
| \$25,000–\$50,000 | 26 | 25 |
| \$50,000–\$75,000 | 15 | 14 |
| Over \$75,000 | 6 | 28 |

Education Level, War Babies/Silent Generation versus All Adults

Percentage

| | War babies/silent generation | All adults |
|---------------------|------------------------------|------------|
| High school or less | 49 | 40 |
| Some college | 27 | 31 |
| College | 15 | 18 |
| Postgraduate | 9 | 10 |

The Oldest Americans Are Highly Satisfied with the Quality of Life in Their Community

The oldest Americans overwhelmingly say that they are very satisfied with the quality of life in their community. Sixty-seven percent of the oldest Americans say this, compared with 49 percent of the U.S. population overall. What's more, they are more likely than the broader population to say they expect this high quality of life to continue.

Satisfaction with Community's Quality of Life, War Babies/Silent Generation versus All Adults

Percentage

| | War babies/silent generation | All adults |
|-----------------------|------------------------------|------------|
| Very satisfied | 67 | 49 |
| Somewhat satisfied | 28 | 38 |
| Somewhat dissatisfied | 2 | 7 |
| Very dissatisfied | 3 | 5 |

Impression of Trend of Quality of Life in the Community, War Babies/Silent Generation versus All Adults

Percentage

| | War babies/silent generation | All adults |
|--------|------------------------------|------------|
| Better | 16 | 19 |
| Worse | 10 | 17 |
| Same | 72 | 63 |

War Babies/Silent Generation: Small-Town Dwellers

America's oldest generations tend to live in smaller communities, with 39 percent currently in small towns. About a quarter of the members of these generations live in the suburbs.

Current and Preferred Community Type, War Babies/Silent Generation versus All Adults

Percentage

| | War babies/silent generation, current | War babies/silent generation, preferred | All adults, current | All adults, preferred |
|-------------------|---------------------------------------|---|---------------------|-----------------------|
| Rural | 15 | 16 | 15 | 24 |
| Small town | 39 | 33 | 32 | 26 |
| Suburbs | 24 | 18 | 21 | 17 |
| Medium-sized city | 13 | 15 | 17 | 16 |
| Big city | 9 | 10 | 14 | 12 |

Many Older Americans Plan to Age in Place

Twenty-two percent of the members of these generations expect to move in the next five years, the lowest percentage of any generation. These oldest Americans expect to be able to age in their own homes.

These findings parallel those discussed by John McIlwain, ULI senior resident fellow and ULI/J. Ronald Terwilliger Chair for Housing, in his report *Housing in America: The Baby Boomers Turn 65*. McIlwain cites the growing popularity among older Americans of aging in place and living alone.ⁱ As these older generations continue to age in their homes and communities, new models of supportive living may be needed for them. In *Housing in America*, McIlwain identifies alternatives to traditional senior care facilities, including multigenerational living.

Moving Statistics, War Babies/Silent Generation versus All Adults

Percentage

| | War babies/silent generation | All adults |
|-----------------------------------|------------------------------|------------|
| Moved in past five years | 19 | 32 |
| Likely to move in next five years | 22 | 42 |

Most Older Americans Own Their Home, But Many Are Skeptical of Homeownership as an Investment

Seventy-four percent of the war babies and members of the silent generation own their home; however, only 55 percent consider homeownership a good investment, the smallest percentage of any generation.

Homeownership Statistics, War Babies/Silent Generation versus All Adults

Percentage

| | War babies/silent generation | All adults |
|--------------------------------------|------------------------------|------------|
| Own primary residence | 74 | 66 |
| Rent primary residence | 26 | 32 |
| See homeownership as good investment | 55 | 71 |

Few Members of Oldest Generations Commute to Work

Only 8 percent of these oldest Americans commute to work or school regularly. Those that are still commuting travel by car. Sixty-five percent of the oldest Americans report that public transportation is available in their community, slightly lower than the U.S. average of 69 percent.

Transportation Statistics, War Babies/Silent Generation versus All Adults

Percentage

| | War babies/silent generation | All adults |
|--------------------------|------------------------------|------------|
| Commute to work | 8 | 63 |
| Commute by car | 91 | 85 |
| Public transit available | 65 | 69 |

Compact Development Appeals to Half of the Oldest Americans

Fifty-one percent of the oldest Americans say they prefer three or more of the community attributes typically associated with compact development.

Like the baby boomers, many members of these generations would give up living in a larger home in exchange for a shorter commute. Sixty-five percent of this cohort would choose a smaller house and a shorter commute over a larger house with a longer commute, compared with 61 percent of Americans overall (and 72 percent of baby boomers).

Community Attribute Preferences, War Babies/Silent Generation versus All Adults

Percentage naming listed attribute

| | War babies/silent generation | All adults |
|---|------------------------------|------------|
| Shorter commute/smaller home | 65 | 61 |
| Close to mix of shops, restaurants, and offices | 51 | 53 |
| Mix of incomes | 47 | 52 |
| Public transportation options | 48 | 51 |
| Mix of homes | 44 | 48 |
| <i>Percentage choosing three or more compact development attributes</i> | <i>51</i> | <i>54</i> |

Distance from Medical Care Is Important to the Oldest Americans

For the oldest Americans, schools are less important than for the U.S. population as a whole. Instead, distance to medical care rises to the top as a key consideration, just behind neighborhood safety.

Community Characteristic Importance Rankings, War Babies/Silent Generation versus All Adults

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

| | War babies/silent generation | All adults |
|--------------------------------------|---|-------------------|
| Neighborhood safety | 92 | 92 |
| Quality of local public schools | 68 | 79 |
| Space between neighbors | 70 | 72 |
| Distance to medical care | 78 | 71 |
| Short distance to work or school | 57 | 71 |
| Walkability | 69 | 70 |
| Distance to shopping/entertainment | 69 | 66 |
| Distance to parks/recreational areas | 60 | 64 |
| Distance to family/friends | 66 | 63 |
| Convenience of public transportation | 56 | 52 |

ⁱ John K. McIlwain, *Housing in America: The Baby Boomers Turn 65* (Washington, D.C.: ULI, 2012), 38–45.



Focus on the Baby Boomer Generation

What do baby boomers desire when it comes to housing, transportation, and community choices? This fact sheet shares key findings from “America in 2013” about the baby boomer generation.

“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.

Baby Boomers Are More Affluent Than the U.S. Average

Members of the baby boom generation, now ages 48 to 66, were born between 1947 and 1965. A total of 73 million baby boomers currently live in the United States, making up 31 percent of the total adult population. Compared with the U.S. population overall, baby boomers have a higher income level. They are also more educated than the U.S. population as a whole and are less diverse.

Ethnicity, Baby Boomers versus All Adults

Percentage

| | Baby boomers | All adults |
|------------------|--------------|------------|
| White | 79 | 69 |
| Latino | 9 | 13 |
| African American | 9 | 12 |

Household Income, Baby Boomers versus All Adults

Percentage

| | Baby boomers | All adults |
|-------------------|--------------|------------|
| Under \$25,000 | 17 | 21 |
| \$25,000–\$50,000 | 23 | 25 |
| \$50,000–\$75,000 | 16 | 14 |
| Over \$75,000 | 33 | 28 |

Education Level, Baby Boomers versus All Adults

Percentage

| | Baby boomers | All adults |
|---------------------|--------------|------------|
| High school or less | 37 | 40 |
| Some college | 31 | 31 |
| College | 19 | 18 |
| Postgraduate | 12 | 10 |

Baby Boomers Are More Likely Than the U.S. Average to Say Things Are Getting Worse

Baby boomers are relatively satisfied with the quality of their community, with satisfaction levels that tend to mirror those of the U.S. population as a whole. Eighty-four percent of baby boomers say they are very or somewhat satisfied with the quality of life in their community, roughly comparable with the 87 percent of the U.S. population overall with that opinion.

However, baby boomers are more likely than Americans overall to think life in their community is getting worse. Twenty-two percent of baby boomers have that impression, compared with 17 percent of the U.S. population overall.

Satisfaction with Community's Quality of Life, Baby Boomers versus All Adults

Percentage

| | Baby boomers | All adults |
|-----------------------|--------------|------------|
| Very satisfied | 47 | 49 |
| Somewhat satisfied | 37 | 38 |
| Somewhat dissatisfied | 9 | 7 |
| Very dissatisfied | 5 | 5 |

Impression of Trend of Quality of Life in the Community, Baby Boomers versus All Adults

Percentage

| | Baby boomers | All adults |
|--------|--------------|------------|
| Better | 17 | 19 |
| Worse | 22 | 17 |
| Same | 61 | 63 |

Baby Boomers Are Found in Every Community Type, But Many Would Prefer Rural Living

Baby boomers are relatively evenly distributed across all community types: about 28 percent live in a small town, 20 percent in the suburbs, and 30 percent in a medium-sized or big city.

For baby boomers, the pull of rural living is strong. Baby boomers are more likely than the U.S. population overall to say that if they could live anywhere in the next five years, they would like to live in a more rural area, with 30 percent holding that view, rather than a big city, at 9 percent. Twenty-nine percent of baby boomers would like to live in a small town.

Current and Preferred Community Type, Baby Boomers versus All Adults

Percentage

| | Baby boomers, current | Baby boomers, preferred | All adults, current | All adults, preferred |
|-------------------|-----------------------|-------------------------|---------------------|-----------------------|
| Rural | 19 | 30 | 15 | 24 |
| Small town | 28 | 29 | 32 | 26 |
| Suburbs | 20 | 21 | 21 | 17 |
| Medium-sized city | 16 | 13 | 17 | 16 |
| Big city | 14 | 9 | 14 | 12 |

Many Baby Boomers Are Looking to Age in Place

Baby boomers, most of whom are now empty nesters—though 40 percent still have children at home—are not as anxious to move as the younger generations. Baby boomers may have less reason to move: 80 percent own their own home.

About three in ten baby boomers—31 percent—say they expect to change residence in the next five years, considerably less than the U.S. average of 42 percent, and lower than the percentages for gen Xers (41 percent) and gen Yers (63 percent).

Moving Statistics, Baby Boomers versus All Adults

Percentage

| | Baby boomers | All adults |
|-----------------------------------|--------------|------------|
| Moved in past five years | 20 | 32 |
| Likely to move in next five years | 31 | 42 |

Most Baby Boomers Own Their Own Homes

Baby boomers overwhelmingly consider homeownership a good investment (73 percent); 80 percent own their own home. Most baby boomers who expect to move say that they likely will own their new home.

Homeownership Statistics, Baby Boomers versus All Adults

Percentage

| | Baby boomers | All adults |
|--------------------------------------|--------------|------------|
| Own primary residence | 80 | 66 |
| Rent primary residence | 20 | 32 |
| If moving, expect to own* | 79 | 73 |
| If moving, expect to rent* | 20 | 25 |
| See homeownership as good investment | 73 | 71 |

*Among those likely or very likely to move in the next five years.

Many Baby Boomers Continue to Commute to Work, and They Commute by Car

About 58 percent of baby boomers commute to work or school three or more days a week, and the vast majority commute by car. More than three in five (63 percent) of baby boomers report that public transportation is available in their community, slightly lower than the U.S. average of 69 percent.

Transportation Statistics, Baby Boomers versus All Adults

Percentage

| | Baby boomers | All adults |
|--------------------------|--------------|------------|
| Commute to work | 58 | 63 |
| Commute by car | 90 | 85 |
| Public transit available | 63 | 69 |

Though Most Boomers Live in Single-Family Homes, Many Are Open to Other Options

Unlike previous generations, many baby boomers will need to continue working beyond retirement age, says John McIlwain, ULI senior resident fellow and ULI/J. Ronald Terwilliger Chair for Housing, in his report *Housing in America: The Baby Boomers Turn 65*. McIlwain attributes this change to concern about long-term financial security and the need to build suitable retirement savings, particularly as life expectancy for older Americans continues to rise.¹

Perhaps because of these concerns, there is a hint of an increased market for compact housing among this age group. Sixty-five percent of baby boomers who are looking to move have their sights set on a single-family home—a smaller percentage of this group than currently lives in such housing (76 percent). This is a contrast with every other generation, for which a higher percentage of movers want to be in a single-family home than currently live in one.

Current and Expected Housing Type, Baby Boomers versus All Adults

Percentage

| | Baby boomers, current | Baby boomers, expected* | All adults, current | All adults, expected* |
|--------------------------------|-----------------------|-------------------------|---------------------|-----------------------|
| Single-family home | 76 | 65 | 66 | 67 |
| Apartment | 11 | 11 | 18 | 15 |
| Duplex, townhouse, or rowhouse | 7 | 16 | 11 | 14 |

*Among those likely or very likely to move in the next five years.

Baby Boomers Desire Many of the Characteristics of Compact, Mixed-Use Development

Baby boomers stand out as the generation most likely to give up living in a larger home if it means they could have a shorter commute. Close to three-quarters of this cohort (72 percent) would choose a smaller house with a shorter commute over a larger house with a longer commute, compared with 61 percent of Americans overall.

Baby boomers are divided on their views of living in mixed-use communities close to shops, restaurants, and offices (49 percent preferring a mix, 50 percent preferring no mix) and show a preference for communities with a similar housing stock (55 percent similar and 42 percent a mix)

Community Attribute Preferences, Baby Boomers versus All Adults

Percentage naming listed attribute

| | Baby boomers | All adults |
|---|--------------|------------|
| Shorter commute/smaller home | 72 | 61 |
| Close to mix of shops, restaurants, and offices | 49 | 53 |
| Mix of incomes | 53 | 52 |
| Public transportation options | 52 | 51 |
| Mix of homes | 42 | 48 |
| <i>Percentage choosing three or more compact development attributes</i> | <i>57</i> | <i>54</i> |

Baby Boomers Place a High Value on Safety and Schools

When asked to indicate how they view the importance of certain community characteristics, baby boomers' preferences closely mirror those of the broader U.S. population. Safety and schools top the list of considerations for baby boomers, followed by distance to medical care.

Baby boomers might be willing to forgo the large house, but among the generations they are neither the most nor least interested in living in communities close to shopping and entertainment. Sixty-seven percent rank this attribute 6 or higher in importance on a scale 1 of 10, compared with 71 percent of gen Yers and 58 percent of gen Xers. Baby boomers are also in the middle of the pack when it comes to rating the importance of being close to family and friends (60 percent rank this attribute 6 or higher), close to medical care (72 percent rank it 6 or higher), and walkability (67 percent rank it 6 or higher).

Community Characteristic Importance Rankings, Baby Boomers versus All Adults

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

| | Baby boomers | All adults |
|--------------------------------------|--------------|------------|
| Neighborhood safety | 92 | 92 |
| Quality of local public schools | 74 | 79 |
| Space between neighbors | 70 | 72 |
| Distance to medical care | 72 | 71 |
| Short distance to work or school | 67 | 71 |
| Walkability | 67 | 70 |
| Distance to shopping/entertainment | 67 | 66 |
| Distance to parks/recreational areas | 63 | 64 |
| Distance to family/friends | 60 | 63 |
| Convenience of public transportation | 50 | 52 |

ⁱ John K. McIlwain, *Housing in America: The Baby Boomers Turn 65* (Washington, D.C.: ULI, 2012), 15–19.



Focus on Generation X

What does generation X desire when it comes to housing, transportation, and community choices? This fact sheet shares key findings from “America in 2013” about generation X.

“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.

Generation X Is More Affluent Than the U.S. Average

Members of generation X—Americans currently between the ages of 35 and 47—have been raising families during times of both economic boom and bust, and are better educated and more financially well off than most other generations. Born between 1966 and 1978, generation X is made up of 55 million Americans. Gen X is not a particularly diverse generation. The typical gen Xer is married with children, and 44 percent of this generation has an income of \$75,000 or more.

Ethnicity, Gen X versus All Adults

Percentage

| | Gen X | All adults |
|------------------|-------|------------|
| White | 73 | 69 |
| Latino | 9 | 13 |
| African American | 8 | 12 |

Household Income, Gen X versus All Adults

Percentage

| | Gen X | All adults |
|-------------------|-------|------------|
| Under \$25,000 | 13 | 21 |
| \$25,000–\$50,000 | 17 | 25 |
| \$50,000–\$75,000 | 15 | 14 |
| Over \$75,000 | 44 | 28 |

Education Level, Gen X versus All Adults

Percentage

| | Gen X | All adults |
|---------------------|-------|------------|
| High school or less | 28 | 40 |
| Some college | 31 | 31 |
| College | 25 | 18 |
| Postgraduate | 14 | 10 |

Members of Gen X Tend to Be Highly Satisfied and Believe Life Is Getting Better

Gen Xers are very satisfied, with 91 percent saying they are very or somewhat satisfied with the quality of life in their community, compared with 87 percent of the U.S. population overall. Gen Xers also tend to believe that life in their community is getting better.

Satisfaction with Community's Quality of Life, Gen X versus All Adults

Percentage

| | Gen X | All adults |
|-----------------------|-------|------------|
| Very satisfied | 51 | 49 |
| Somewhat satisfied | 40 | 38 |
| Somewhat dissatisfied | 4 | 7 |
| Very dissatisfied | 5 | 5 |

Impression of Trend of Quality of Life in the Community, Gen X versus All Adults

Percentage

| | Gen X | All adults |
|--------|-------|------------|
| Better | 21 | 19 |
| Worse | 18 | 17 |
| Same | 60 | 63 |

Gen X Prefers Suburban, Rural, and Small-Town Life

Gen X is not a very urban generation: 34 percent of gen Xers live in a small town, and 17 percent live in a rural area. Gen Xers also tend to prefer living in a smaller setting. Only 23 percent would like to live in a medium or big city, compared with 28 percent of Americans as a whole.

Current and Preferred Community Type, Gen X versus All Adults

Percentage

| | Gen X, current | Gen X, preferred | All adults, current | All adults, preferred |
|-------------------|-------------------|---------------------|------------------------|--------------------------|
| Rural | 17 | 27 | 15 | 24 |
| Small town | 34 | 27 | 32 | 26 |
| Suburbs | 20 | 21 | 21 | 17 |
| Medium-sized city | 16 | 15 | 17 | 16 |
| Big city | 14 | 8 | 14 | 12 |

Generation X Is on the Move

Gen X is a generation that is moving around: about 31 percent of its members have moved in the past five years, and 41 percent expect to move in the next five. These numbers are comparable with those for the U.S. population overall, but are somewhat lower than those for gen Y, which is the generation *most* likely to have moved or expect to move.

Moving Statistics, Gen X versus All Adults

Percentage

| | Gen X | All adults |
|-----------------------------------|-------|------------|
| Moved in past five years | 31 | 32 |
| Likely to move in next five years | 41 | 42 |

Gen X Is a Generation of Homeowners

Most members of gen X own their own home and, if they move, they expect to own the next one, too. It is perhaps not surprising then that 79 percent of gen Xers consider homeownership a good investment, a higher percentage than for the broader U.S. population—71 percent.

Homeownership Statistics, Gen X versus All Adults

Percentage

| | Gen X | All adults |
|--------------------------------------|-------|------------|
| Own primary residence | 78 | 66 |
| Rent primary residence | 22 | 32 |
| If moving, expect to own* | 81 | 73 |
| If moving, expect to rent* | 16 | 25 |
| See homeownership as good investment | 79 | 71 |

*Among those likely or very likely to move in the next five years.

Gen Xers Commute to Work or School, and They Commute by Car

Eighty percent of gen Xers commute to school or work three or more days a week, and the vast majority commute by car—92 percent, compared with the U.S. average of 85 percent. About three in five gen Xers (63 percent) report that public transportation is available in their community, slightly lower than the U.S. average of 69 percent.

Transportation Statistics, Gen X versus All Adults

Percentage

| | Gen X | All adults |
|---------------------------|-------|------------|
| Commute to work or school | 80 | 63 |
| Commute by car | 92 | 85 |
| Public transit available | 63 | 69 |

For Gen X, Single-Family Homes Are the Draw

Seventy-five percent of gen Xers currently live in a single-family home, with 11 percent now living in apartments and 10 percent living in a duplex, townhouse, or rowhouse. What's more, 87 percent of gen X movers expect to move into a single-family home—a much higher percentage than those who are currently in one (75 percent).

Current and Expected Housing Type, Gen X versus All Adults

Percentage

| | Gen X, current | Gen X, expected* | All adults, current | All adults, expected* |
|--------------------------------|----------------|------------------|---------------------|-----------------------|
| Single-family home | 75 | 87 | 66 | 67 |
| Apartment | 11 | 6 | 18 | 15 |
| Duplex, townhouse, or rowhouse | 10 | 4 | 11 | 14 |

* Among those likely or very likely to move in the next five years.

Gen X Has Mixed Feelings about Mixed Use

When it comes to the kind of communities gen X prefers, places featuring attributes associated with compact development appeal to about half the generation. Although gen X's preferences are less urban than those of gen Y and baby boomers, half of gen Xers prefer being close to a mix of shops, restaurants, and offices, and more than 53 percent prefer communities with a mix of incomes.

Community Attribute Preferences, Gen X versus All Adults

Percentage naming listed attribute

| | Gen X | All adults |
|---|-----------|------------|
| Shorter commute/smaller home | 54 | 61 |
| Close to mix of shops, restaurants, and offices | 50 | 53 |
| Mix of incomes | 53 | 52 |
| Public transportation options | 45 | 51 |
| Mix of homes | 47 | 48 |
| <i>Percentage choosing three or more compact development attributes</i> | <i>49</i> | <i>54</i> |

Gen X Cares Most about Safety, Schools, and Space

When asked to indicate how they view the importance of certain community characteristics, 97 percent of gen Xers say safety is paramount. Schools are next on their list. Space between neighbors is also a key consideration, with 79 percent of gen Xers ranking such space high in importance, compared with 72 percent of the U.S. population overall.

Community Characteristic Importance Rankings, Gen X versus All Adults

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

| | Gen X | All adults |
|--------------------------------------|-------|------------|
| Neighborhood safety | 97 | 92 |
| Quality of local public schools | 82 | 79 |
| Distance to medical care | 63 | 71 |
| Space between neighbors | 79 | 72 |
| Short distance to work or school | 71 | 71 |
| Walkability | 67 | 70 |
| Distance to shopping/entertainment | 58 | 66 |
| Distance to parks/recreational areas | 62 | 64 |
| Distance to family/friends | 57 | 63 |
| Convenience of public transportation | 45 | 52 |



Focus on Generation Y

What does generation Y desire when it comes to housing, transportation, and community choices? This fact sheet shares key findings from “America in 2013” about gen Y.

“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.

Generation Y Is America’s Most Diverse Generation

Generation Y, also known as the millennial generation, is the youngest group of adults surveyed as part of “America in 2013.” Gen Y is composed of people born between 1979 and 1995, who are now between the ages of 18 and 34. There are 72 million members of gen Y, a number that continues to grow as immigrants in this age cohort enter the United States.¹

Gen Y stands out as the most urban, multicultural, and transient generation in America today. Forty percent of generation Y is Latino or African American. Compared with the U.S. population as a whole, gen Y has comparatively low levels of education and income—a testament to their relative youth, as well as to the fact that they are just starting their careers amid a challenging job market.

Ethnicity, Gen Y versus All Adults

Percentage

| | Gen Y | All adults |
|------------------|-------|------------|
| White | 51 | 69 |
| Latino | 18 | 13 |
| African American | 22 | 12 |

Household Income, Gen Y versus All Adults

Percentage

| | Gen Y | All adults |
|-------------------|-------|------------|
| Under \$25,000 | 30 | 21 |
| \$25,000–\$50,000 | 31 | 25 |
| \$50,000–\$75,000 | 12 | 14 |
| Over \$75,000 | 18 | 28 |

Education Level, Gen Y versus All Adults

Percentage

| | Gen Y | All adults |
|---------------------|-------|------------|
| High school or less | 49 | 40 |
| Some college | 34 | 31 |
| College | 11 | 18 |
| Postgraduate | 5 | 10 |

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

Gen Y Is Less Satisfied Than the U.S. Population as a Whole, But Thinks Life Is Getting Better

Gen Yers' satisfaction with the quality of life in their community lags that of the overall U.S. population: whereas 82 percent of gen Yers say they are very or somewhat satisfied with the quality of life in their community, 87 percent of the U.S. population as a whole says this. For gen Y, there is room for improvement.

Gen Y is the least satisfied of all the generations with the range of housing options available (25 percent say they are dissatisfied) and with the quality and quantity of job and career opportunities in their community (49 percent express dissatisfaction).

However, gen Yers are optimistic. About 21 percent of gen Yers say life in their community is getting better, compared with 19 percent of Americans overall; 16 percent say it is getting worse, compared with 17 percent of the U.S. population overall.

Satisfaction with Community's Quality of Life, Gen Y versus All Adults

| Percentage | Gen Y | All adults |
|-----------------------|-------|------------|
| Very satisfied | 40 | 49 |
| Somewhat satisfied | 42 | 38 |
| Somewhat dissatisfied | 9 | 7 |
| Very dissatisfied | 7 | 5 |

Impression of Trend of Quality of Life in the Community, Gen Y versus All Adults

| Percentage | Gen Y | All adults |
|------------|-------|------------|
| Better | 21 | 19 |
| Worse | 16 | 17 |
| Same | 62 | 63 |

Gen Yers Can Be Found in Every Community Type, But Many Are Drawn to Urban Living

Gen Yers are relatively evenly distributed across all community types: about 30 percent of gen Yers live in a small town, 17 percent in the suburbs, and another 39 percent are in a medium-sized or big city.ⁱⁱ

For gen Y, the appeal of urban living is strong. Gen Yers are more likely than the U.S. population overall to say that if they could live anywhere in the next five years, they would live in a medium-sized or big city. Forty percent of gen Yers express that preference, compared with only about 28 percent of the U.S. population as a whole.

Current and Preferred Community Type, Gen Y versus All Adults

| Percentage | Gen Y, current | Gen Y, preferred | All adults, current | All adults, preferred |
|-------------------|----------------|------------------|---------------------|-----------------------|
| Rural | 12 | 20 | 15 | 24 |
| Small town | 30 | 19 | 32 | 26 |
| Suburbs | 17 | 17 | 21 | 17 |
| Medium-sized city | 21 | 20 | 17 | 16 |
| Big city | 18 | 20 | 14 | 12 |

Generation Y Is on the Move

Gen Y is a generation on the move: 53 percent of gen Yers say they have moved recently, and 63 percent say they expect to move in the next five years. These numbers are much higher than for the U.S. population overall, and specifically for baby boomers, 31 percent of whom say they expect to move in the next five years, and gen Xers, 41 percent of whom expect to move.

Moving Statistics, Gen Y versus All Adults

| Percentage | Gen Y | All adults |
|-----------------------------------|-------|------------|
| Moved in past five years | 53 | 32 |
| Likely to move in next five years | 63 | 42 |

Gen Y Is a Generation of Renters

Generation Y is a generation of renters: 54 percent of gen Yers currently rent. Of note: only 31 percent of gen-Y movers say they expect to own their new home—perhaps an acknowledgment of a difficult job market.

Despite this generation's limited experience with owning a home, 72 percent of gen Yers say homeownership is a good investment.

Homeownership Statistics, Gen Y versus All Adults

| Percentage | Gen Y | All adults |
|--------------------------------------|-------|------------|
| Own primary residence | 40 | 66 |
| Rent primary residence | 54 | 32 |
| If moving, expect to own* | 31 | 73 |
| If moving, expect to rent* | 69 | 25 |
| See homeownership as good investment | 72 | 71 |

* Among those likely or very likely to move in the next five years.

Gen Y Uses Public Transit

About 86 percent of gen Yers commute to work or school three or more days a week. Eighty-one percent reports having access to public transportation, a higher percentage than for the U.S. population as a whole, of which 69 percent says it has access to transit. Though the vast majority of gen Yers commute by car, many take advantage of public transit or other options: the percentage of gen Yers commuting by automobile is lower than for the U.S. population overall.

Transportation Statistics, Gen Y versus All Adults

| Percentage | Gen Y | All adults |
|---------------------------|-------|------------|
| Commute to work or school | 86 | 63 |
| Commute by car | 77 | 85 |
| Public transit available | 81 | 69 |

For Gen Y, the Desire for a Single-Family Home Is Strong

Although only 49 percent of gen Yers currently live in a single-family home, 60 percent of those who expect to move in the next five years say they want to move into one. Still, 39 percent of the gen Yers expecting to move think they will end up in an apartment or duplex, townhouse, or rowhouse, higher than the U.S. average of 29 percent.

Current and Expected Housing Type, Gen Y versus All Adults

Percentage

| | Gen Y, Current | Gen Y, Expected* | All adults, Current | All adults, Expected* |
|--------------------------------|-------------------|---------------------|------------------------|--------------------------|
| Single-family home | 49 | 60 | 66 | 67 |
| Apartment | 31 | 21 | 18 | 15 |
| Duplex, townhouse, or rowhouse | 15 | 17 | 11 | 14 |

*Among those likely or very likely to move in the next five years.

Gen Y's Preferences Tend to Be More Urban Than Those of the U.S. Population Overall

When it comes to community attributes, members of gen Y express preferences that skew more urban than those of the country as a whole. Fifty-nine percent of gen Yers like communities with a mix of housing types, compared with 48 percent of the U.S. population overall; 62 percent want to be in community with a mix of shops, restaurants, and offices, compared with 61 percent of the U.S. population overall; and 55 percent want public transportation options, compared with an overall U.S. figure of 51 percent.

Of note: there is one area where gen Y lags the overall U.S. population: only 54 percent of gen Yers would give up a larger home if it meant a shorter commute, compared with 61 percent of the U.S. population overall. Perhaps gen Y has not yet experienced the agony of a long commute.

Community Attribute Preferences, Gen Y versus All Adults

Percentage naming listed attribute

| | Gen Y | All adults |
|---|-----------|------------|
| Shorter commute/smaller home | 54 | 61 |
| Close to mix of shops, restaurants, and offices | 62 | 53 |
| Mix of incomes | 52 | 52 |
| Public transportation options | 55 | 51 |
| Mix of homes | 59 | 48 |
| <i>Percentage choosing three or more compact development attributes</i> | <i>59</i> | <i>54</i> |

Gen Y Values Proximity, Walkability

When asked to indicate how they view the importance of certain community characteristics, gen Yers respond with answers similar to those of the broader population in some areas. As is the case for the country overall, safety and schools top the list of considerations for gen Y. In fact, local public schools are more important to gen Y than to any other generation.

However, gen Y tends to place more importance on being a short distance from work or school and on walkability than does the U.S. population overall. Gen Y ranks other proximity factors—being close to parks and recreational areas, to shopping and entertainment, and to family and friends—high in importance as well.ⁱⁱⁱ Gen Y also places high importance on public transportation.

Gen Y also walks the walks. Like baby boomers, gen Yers walk more than the other generations. Nearly one in four people in generation Y (23 percent) reports walking several blocks to a destination nearly every day.

Community Characteristic Importance Rankings, Gen Y versus All Adults

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

| | Gen Y | All adults |
|--------------------------------------|-------|------------|
| Neighborhood safety | 88 | 92 |
| Quality of local public schools | 87 | 79 |
| Distance to medical care | 73 | 71 |
| Space between neighbors | 69 | 72 |
| Short distance to work or school | 82 | 71 |
| Walkability | 76 | 70 |
| Distance to shopping/entertainment | 71 | 66 |
| Distance to parks/recreational areas | 68 | 64 |
| Distance to family/friends | 69 | 63 |
| Convenience of public transportation | 57 | 52 |

ⁱ M. Leanne Lachman and Deborah L. Brett, *Generation Y: America's New Housing Wave* (Washington, D.C.: ULI, 2011), 2.

ⁱⁱ *Generation Y: Shopping and Entertainment in the Digital Age* also found that 39 percent of gen Yers characterize themselves as a city person. M. Leanne Lachman and Deborah L. Brett, *Generation Y: Shopping and Entertainment in the Digital Age* (Washington, D.C.: ULI, 2013), 3.

ⁱⁱⁱ *Generation Y: America's New Housing Wave* also found that generation Y ranks distance to family and friends high in importance among community features, along with proximity to work. The authors note that gen Yers desire to balance work and life through their community choices. Lachman and Brett, *Generation Y: America's New Housing Wave*, 13.