America in 2013
A ULI Survey of Views on Housing, Transportation, and Community

PCRG Community Development Summit
Pittsburgh, PA | May 21-22, 2013
ABOUT THE TERWILLIGER CENTER

Our Mission

Expand housing opportunity by leveraging the private sector and other partners to create and sustain mixed-income, mixed-use urban and suburban neighborhoods.

Our Work

• A multifaceted program of work organized into four broad categories: (1) research and education; (2) publications; (3) outreach and recognition; and (4) convenings.

• Primary focus on state, regional and local programs/policies.
WHAT IS AMERICA IN 2013?
PARTNERS AND GOALS

Partners

• Joint Effort: Terwilliger Center & Infrastructure Initiative.

• Survey Partner: Belden Russonello Strategists LLC.

Goal

• Inform the housing, transportation, and land use conversation with new data.
OBJECTIVES

• American’s satisfaction with their communities, housing and transportation.
• What they want for themselves and their families.
• Interest in compact development.
• How demand varies by generation.
METHODOLOGY

• Nationwide survey of 1,202 adults
• Conducted January 16- February 3, 2013
• 47 Questions + Demographics
• Survey conducted by live interviewers on landlines and cell phones.
• Margin of sampling error is plus or minus 2.9 percentage points at the 95% confidence level.
QUALITY OF LIFE IN COMMUNITY

Currently

- Very satisfied: 49%
- Somewhat satisfied: 7%
- Getting better: 5%
- Staying about the same: 7%

Prospectively

- Very satisfied: 63%
- Somewhat satisfied: 17%
- Getting better: 19%
- Staying about the same: 7%
SATISFACTION WITH COMMUNITY FEATURES

72% are satisfied with transportation options

43% are satisfied with public transit availability

49% are satisfied with number and quality of job opportunities

75% are satisfied with public transit quality (when it’s available)
75% are satisfied with the quality of public transit

51% are dissatisfied with the lack of public transit availability

Where public transit is available

Where public transit is unavailable
LURE OF HOMEOWNERSHIP REMAINS

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

Especially true for:

- Incomes greater than $75K (87%)
- College graduates (80%)
- Generation X (79%)
Percentage Owning Their Home

66% All respondents

50% Single

46% Living in big city

44% Latino

40% Gen Y
LIKELY MOVERS EXPECTING TO OWN WITHIN 5 YEARS

<table>
<thead>
<tr>
<th>Housing Type</th>
<th>Current</th>
<th>Expected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family home</td>
<td>56%</td>
<td>67%</td>
</tr>
<tr>
<td>Apartment</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>Duplex, row house, or townhouse</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Manufactured or mobile home</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Own</td>
<td>48%</td>
<td>73%</td>
</tr>
<tr>
<td>Rent</td>
<td>47%</td>
<td>25%</td>
</tr>
</tbody>
</table>
HOW WE MOVE IS CHANGING

77% drive daily
Driving is particularly prevalent for those earning more than $75,000 per year (93%).

6% use public buses and trains daily
African Americans (18%) and Latinos (14%) are more likely than other groups to use public transit nearly every day.

2% bike daily
26% bike during a typical month. Men (20%) are twice as likely as women (9%) to bike at least once a week.

22% walk to a destination nearly every day
Big-city dwellers walk the most, with 39% walking daily and another 20% walking at least once a week.
HOW WE MOVE AT LEAST ONCE A WEEK

Among the general population:

• **91%** go somewhere by car, truck, or motorcycle
• **44%** walk several blocks or more
• **11%** take public transit
• **14%** ride a bike
11% of all commuters take public transportation:

- Big city residents (32%)
- African Americans (32%)
- Latinos (20%)
- Incomes under $25K (24%)
- Generation Y (18%)
- Singles (21%)
- Northeast residents (21%)
<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All respondents</td>
<td>51%</td>
</tr>
<tr>
<td>Living in big city</td>
<td>69%</td>
</tr>
<tr>
<td>Renters</td>
<td>62%</td>
</tr>
<tr>
<td>Living in medium-sized city</td>
<td>61%</td>
</tr>
<tr>
<td>Multigenerational household</td>
<td>60%</td>
</tr>
<tr>
<td>Single</td>
<td>58%</td>
</tr>
<tr>
<td>Gen Y</td>
<td>55%</td>
</tr>
<tr>
<td>Living alone</td>
<td>53%</td>
</tr>
<tr>
<td>Baby boomers</td>
<td>52%</td>
</tr>
<tr>
<td>Likely movers</td>
<td>52%</td>
</tr>
</tbody>
</table>
THE PLACES WE WANT TO LIVE
<table>
<thead>
<tr>
<th>Percentage Giving Community Attribute a High Ranking in Importance</th>
</tr>
</thead>
</table>
| **92%**  
  Neighborhood  
  safety |
| **71%**  
  Proximity to  
  health care |
| **70%**  
  Easily  
  walkable |
| **66%**  
  Proximity to  
  entertainment |
| **79%**  
  Quality of  
  public schools |
| **72%**  
  Space between  
  neighbors |
| **64%**  
  Proximity to  
  recreation |
| **63%**  
  Proximity to  
  family/friends |
| **52%**  
  Convenient public  
  transportation |
| **71%**  
  Proximity to  
  work/school |
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neighborhood safety</td>
<td>88%</td>
</tr>
<tr>
<td>Quality of public schools</td>
<td>83%</td>
</tr>
<tr>
<td>Easily walkable</td>
<td>79%</td>
</tr>
<tr>
<td>Proximity to work/school</td>
<td>76%</td>
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<tr>
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<td>Convenient public transportation</td>
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<td>Space between neighbors</td>
<td>66%</td>
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<tr>
<td>Proximity to recreation</td>
<td>64%</td>
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</table>
Percentage Likely to Move in the Next Five Years

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All prospective movers</td>
<td>42%</td>
</tr>
<tr>
<td>Gen Y</td>
<td>63%</td>
</tr>
<tr>
<td>African American</td>
<td>63%</td>
</tr>
<tr>
<td>Renters</td>
<td>62%</td>
</tr>
<tr>
<td>Living in big city</td>
<td>56%</td>
</tr>
<tr>
<td>Latino</td>
<td>54%</td>
</tr>
<tr>
<td>Multigenerational household</td>
<td>52%</td>
</tr>
<tr>
<td>&lt;$25K income</td>
<td>51%</td>
</tr>
<tr>
<td>Living in medium-sized city</td>
<td>44%</td>
</tr>
<tr>
<td>Women</td>
<td>42%</td>
</tr>
</tbody>
</table>
Percentage Indicating a Preference for These Community Attributes

- Shorter commute but smaller home: 61%
- Close to shops, restaurants, and offices: 53%
- Mix of incomes: 52%
- Available public transportation: 51%
- Mix of homes: 48%
Percentage of Movers Indicating a Preference for These Community Attributes

- 62% Close to shops, restaurants, and offices
- 59% Shorter commute but smaller home
- 52% Available public transit
- 50% Mix of homes
- 47% Mix of incomes
<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Income &lt;$25K</th>
<th>Renters</th>
<th>Living alone</th>
<th>Post-grad education</th>
<th>$25K–$50K income</th>
<th>Gen Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>All respondents</td>
<td>54%</td>
<td>63%</td>
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<td>60%</td>
<td>59%</td>
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<td></td>
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WAR BABIES (67-82) & SILENT GENERATION (83+)

Most likely to...

• Stay in their current homes
• Want to live in walkable neighborhoods
• Want to be close to health services, friends and family, shopping and entertainment
• Live alone
BABY BOOMERS (48-66)

Unlikely to move soon, but when they do, they want to...

• Live in a smaller home and have a shorter commute
• Be close to parks and open space
• Have space between them and their neighbors
• Live where the homes are similar
GENERATION X (35-47)

Many anticipate moving in the next 5 years, when they do, they are...

- Unlikely to move to mixed use communities
- Likely to buy a single-family home

This generation is the most likely to...

- Have children under 18 living at home
- Be married
- Be highly educated
GENERATION Y (18-34)

*Most likely to...*

- Live in mixed-use communities
- Be unsatisfied with where they live currently
- Move within the next five years
- Move to a walkable community with public transit options
THANK YOU!

Lynn Ross

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Twitter: @mslynnross or @ULIHousing

Full survey results, video, blogs:
http://www.uli.org/communitysurvey