

*National Community and Transportation
Preferences Survey*

September 2017

Executive Summary - Overview

The 2017 Community and Transportation Preferences Survey echoes many of the major findings from the previous surveys. Residents in the fifty top metropolitan areas continue to be split on what they look for in a neighborhood. A small majority prefer the idea of a walkable community and more alternatives to driving, but suburban living remains highly attractive to a sizeable portion of the community.

For the first time, however, compared to online surveys of the same population in 2015 and 2016, residents are split on living in a walkable community with a shorter commute vs. suburban living with a longer commute *even if it means living in attached housing* (a townhouse or apartment). This year's findings also show that it is not just Millennials driving the increased interest in a walkable community, but also retirees – the Silent and Greatest generations – while majorities of Gen Xers and Baby Boomers remain more committed to living in detached homes where driving is necessary. In addition, Millennials with school-age kids are showing greater preference for the suburbs, while Millennials with non-school-age kids or no kids at home remain committed to walkable communities.

Americans remain conflicted when it comes to determining what is most important in a home. On the one hand, there is an evident desire for the closeness and convenience that come from communities where walking is easy and errand and commute times are short. On the other hand, the majority of residents continue to live in single-family, detached homes and value closeness to the highway as much as they do a walkable community.

In general, Americans are satisfied with the quality of life in their community. The vast majority (8 in 10) of top-fifty MSA residents are either *very* or *somewhat satisfied* with their quality of life, with a third overall saying they are *very satisfied*. This number has varied little over the past three years.

**Note: 2015 data is exclusively from the online portion of that survey.*

Executive Summary – Where We Live and Satisfaction

Little has changed over the past couple of years about where people currently live. The majority live in the suburbs and in detached homes, with sidewalks, parks, and public transit nearby. Just over six-in-ten agree they live in at least somewhat walkable communities – the same as in 2015.

- Millennials especially, but also Gen Xers, are more likely to live in at least somewhat walkable neighborhoods, and are more likely to have sidewalks, public transit, and parks nearby.
- The more walkable the community, the more satisfied residents are with their quality of life.

A majority of residents are living in the type of home where they say they would prefer to live, when comparing the type of home they live in to the kind of home and community they would prefer to live in.

- Two-thirds say they are living in the kind of home they would prefer – whether they live in detached or attached homes.
- However, one-in-five residents say that while they live in a detached home, they would prefer to live in an attached home in walkable community with a short commute. These residents are more likely to be older (part of the Silent or Greatest Generation), wealthier, college graduates, and currently living in the suburbs with just houses nearby. Millennials with kids at home are also more likely to be feeling this way.

Executive Summary – Deciding Where to Live

Seven key traits for deciding where to live were tested: walkability (sidewalks and nearness to shops), commute length and closeness to the highway, access to public transportation, and access to bike paths (generic and separated paths). Walkability, a short commute, and proximity to the highway are top priorities – over seven-in-ten residents say those qualities are very or somewhat important in deciding where to live, and access to public transit is not far behind (62 percent). The numbers are in line with the results from 2015.

- Millennials – and Gen Xers to a lesser extent – are much more likely than older generations to prioritize walkability and a short commute to work, with half of Millennials describing those characteristics as VERY important in determining where to live. Millennials also prioritize proximity to public transit as highly as they do closeness to the highway.
- Income is also a key determinant in prioritizing these traits. Access to public transportation is much more important to those earning under \$50,000 (41 percent VERY important) compared to those earning more than \$50,000 (28 percent). Walkability is also more important to those with lower incomes. In contrast, length of commute is equally important no matter the income.
- Women, particularly younger women, are more likely to value walkability than men, both in regards to the presence of sidewalks and the walkability of the community overall. They are also more likely to value proximity to public transit than men. However, young men and women are both strongly committed to having a short commute to work – in stark contrast to men and women over age 50.
- Six-in-ten residents would spend at least a little more for a house in a walkable community. Millennials are more likely than other generations to be willing to spend more, followed by Gen Xers. Those in the Silent/Greatest Generation, notably, are more likely to spend more for a walkable community than Boomers. Those with kids at home, especially Millennials with kids in school, are much more willing than others to invest more in a home in a walkable community.

Executive Summary – Ideal Community

Americans prefer walkable communities, but only to a point. A small majority – as in other years – prefer a walkable community even if it means a smaller yard, but just under half prefer the larger yard and more driving. For the first time, however, half of all respondents say they prefer a walkable community and shorter commute even if it means living in an attached home.

- When the only trade-off for the walkable community is a smaller yard, just over half of all residents prefer that option, with those in the Silent/Greatest Generation the age group most interested (61 percent prefer) and only Gen Xers preferring the less-walkable community. However, **having school-age kids at home is an important determining factor**: six-in-ten residents with school-age kids are more likely to prefer the larger yard and driving community. This finding is just as true for Millennials with school-age kids as it is for Gen Xers with kids in school. Millennials with kids at home (but not in school) are also more likely to opt for the bigger yard and driving, while the opposite is true off the Gen Xers/Boomers with non-school age kids at home. Millennials without children remain strongly committed to a walkable community.
- When given a choice between a detached, single-family house that requires driving to shops and a longer commute to work and a townhouse or apartment with an easy walk to shops and a shorter commute to work, residents now split evenly in their preference. Most notable is that **once the commute length is brought into the equation, Millennials change their preference**: six-in-ten Millennials prefer the walkable community and shorter commute even with the attached home. This remains true even for Millennials with kids at home and in school. Gen Xers, on the other hand, especially with kids at home, opt for the detached home and longer commute.
- Combining the examples above, **37 percent always prefer the walkable community and short commute**, no matter the caveats. Those respondents are more likely to be renters, unmarried without kids, and live in the city. **Thirty-two percent of respondents always prefer homes with bigger yards and more driving**. Those respondents are more likely to live in rural areas or houses-only suburbs, and tend to be older men, upper-middle income, and Gen Xers with kids in school. **The remaining 31 percent are inconsistent**: these respondents are more likely to be Millennials with kids in school and married with kids at home. They are also more likely to live in small towns or on the West coast.

Executive Summary – Transportation

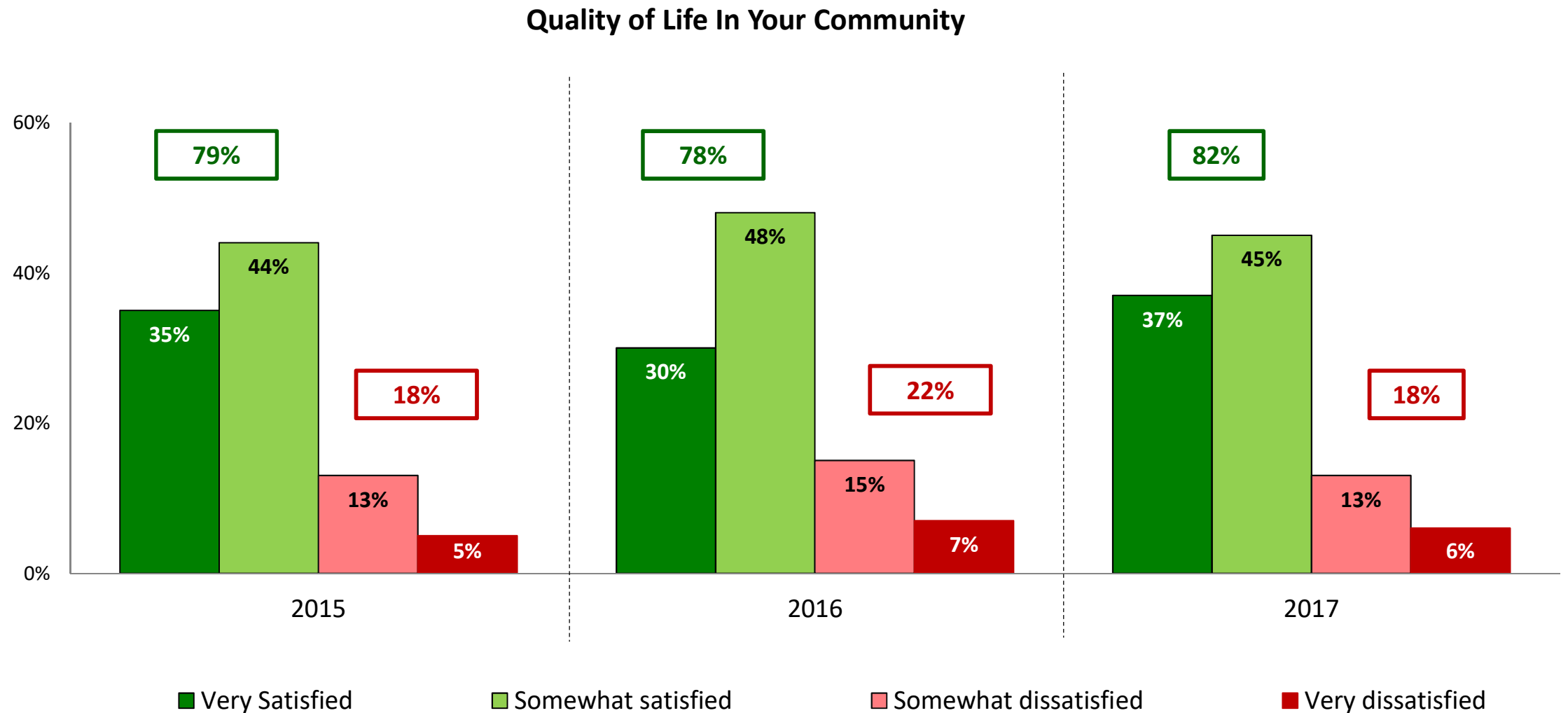
People’s feelings about daily travel over the past two years remain fairly consistent. Most residents say they like walking as well as driving (over 75 percent), but a majority say that they drive because they do not have other options.

- Maintaining roads, bridges, and highways remains residents’ overwhelming priority for the government. Desire to expand alternatives to driving – more public transit, ways to walk and bike, building more walkable communities – experienced a slight downtick from the 2015 survey. While road maintenance is most important to all generations, Millennials and Gen Xers are more interested in expanding transportation alternatives and building walkable communities, and they are somewhat less focused on roads than older generations.
- Nearly half of all residents do not want to replace the shrinking gas tax. The other half are split in which replacement option they like best, with a slight preference for replacing the gas tax with a tax based on number of miles driven.
- Most residents like walking (80 percent) and driving (73 percent), while about half say they like riding a bike, and just over a third (38 percent) say they like taking public transit – a slight uptick from previous years. Age is a key consideration. Young generations are more likely to like biking and taking public transit, while older generations are more likely to say they like driving.
- Nearly six-in-ten residents say that they drive because they have no other options – unchanged over the past three years. These residents are more likely to live in rural areas, small towns, or in the Southwest of the United States. They also tend to be wealthier, older, and higher-educated.

Current Living Environment

Americans are Mostly Satisfied with their Quality of Life

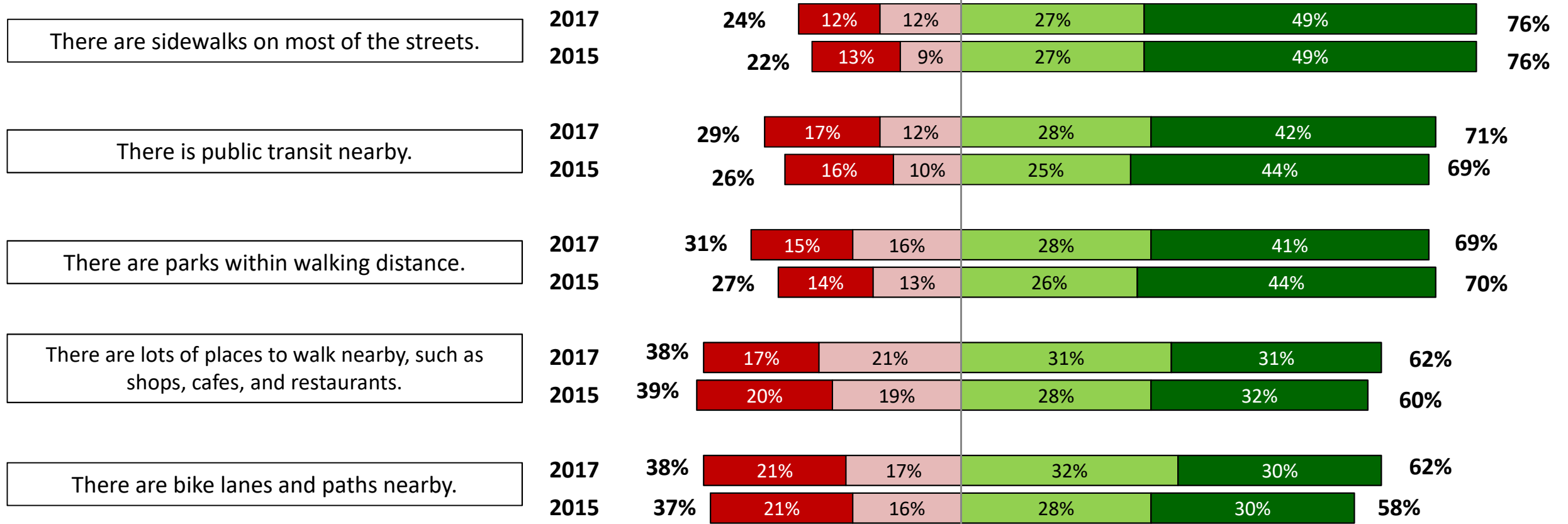
Overall satisfaction has risen slightly since 2015.



The first question is about the quality of life in your community. How satisfied would you say you are with the quality of life in your community?

Most Have Sidewalks, Public Transit, and Parks Nearby, but Fewer are Close to Shops and Restaurants, Bike Paths

Descriptors of the Area Where You Currently Live

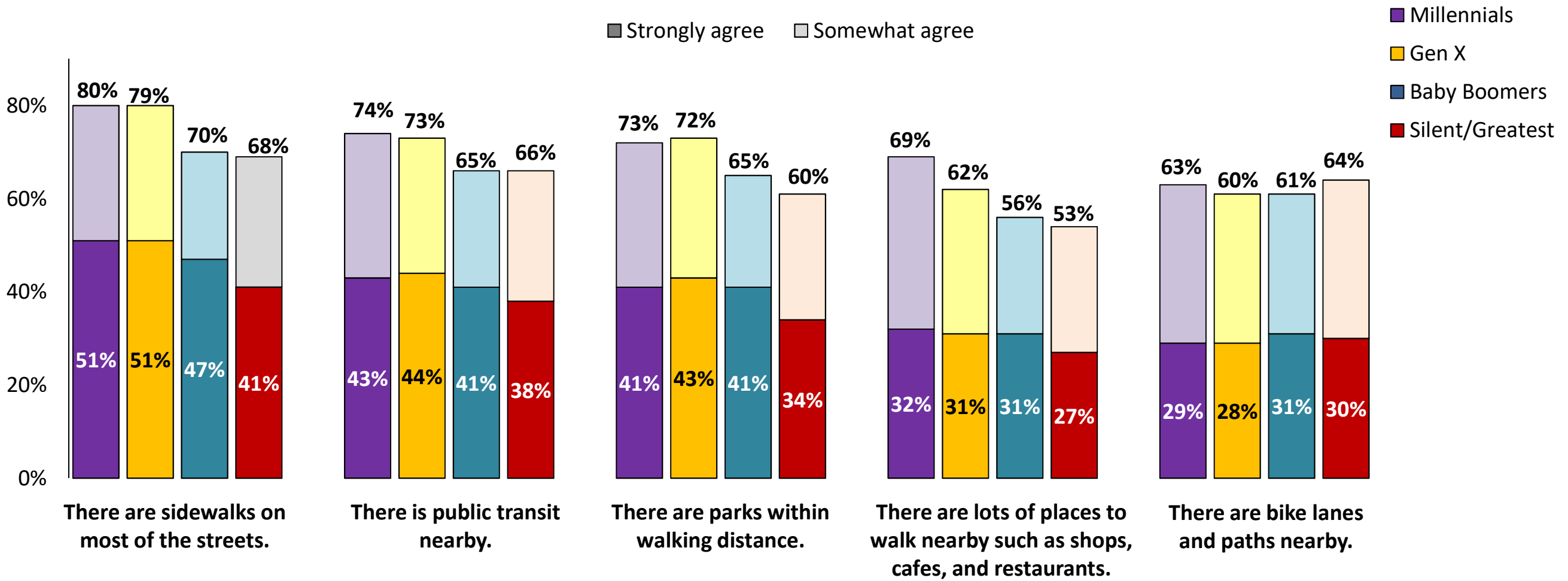


■ Strongly disagree
 ■ Somewhat disagree
 ■ Somewhat agree
 ■ Strongly agree

Next, we have a few questions about your neighborhood and home. Please indicate whether you agree or disagree (strongly or somewhat) with the following statements:

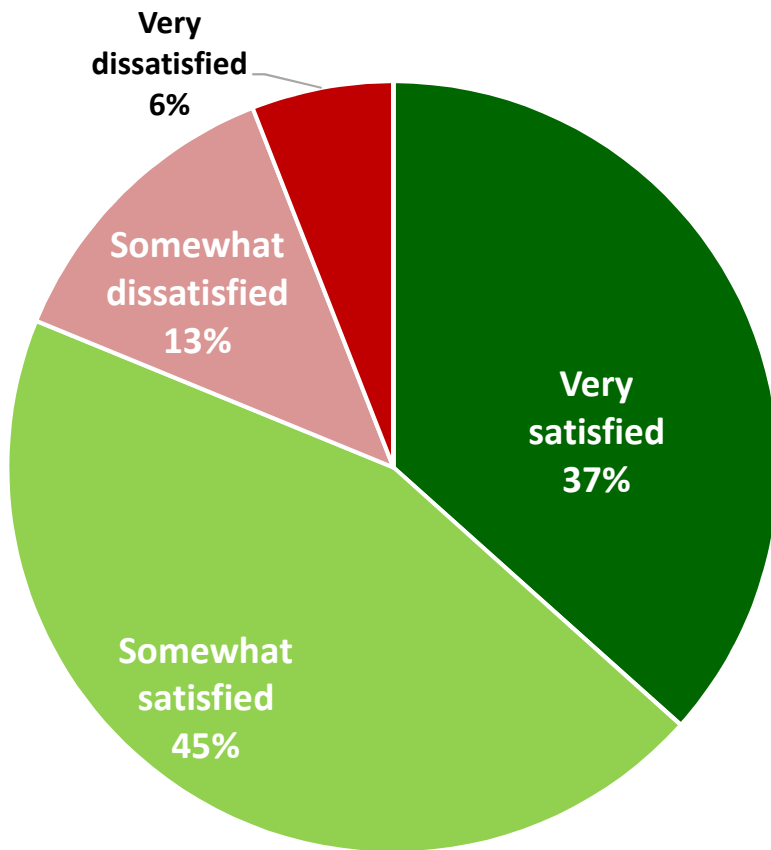
Millennials and Gen Xers More Likely to Live in Walkable Communities, with Sidewalks and Public Transit Nearby

Descriptors of the Area Where You Currently Live by Generation

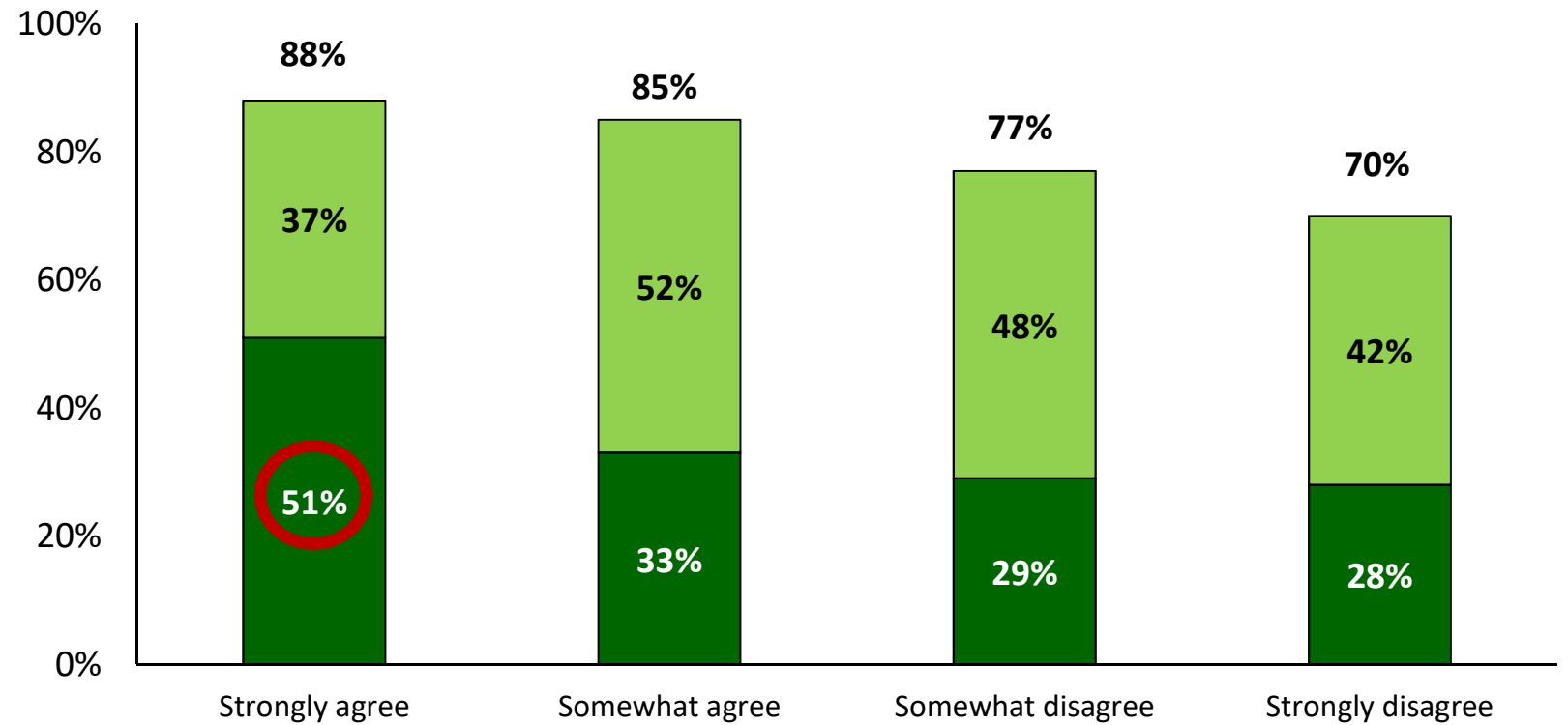


People with Places to Walk are More Satisfied with the Quality of Life in their Community

Quality of Life In Your Community



Quality of Life by Agreement that Neighborhood is Walkable



There are lots of places to walk nearby such as shops, cafes, and restaurants.

■ Very satisfied ■ Somewhat satisfied

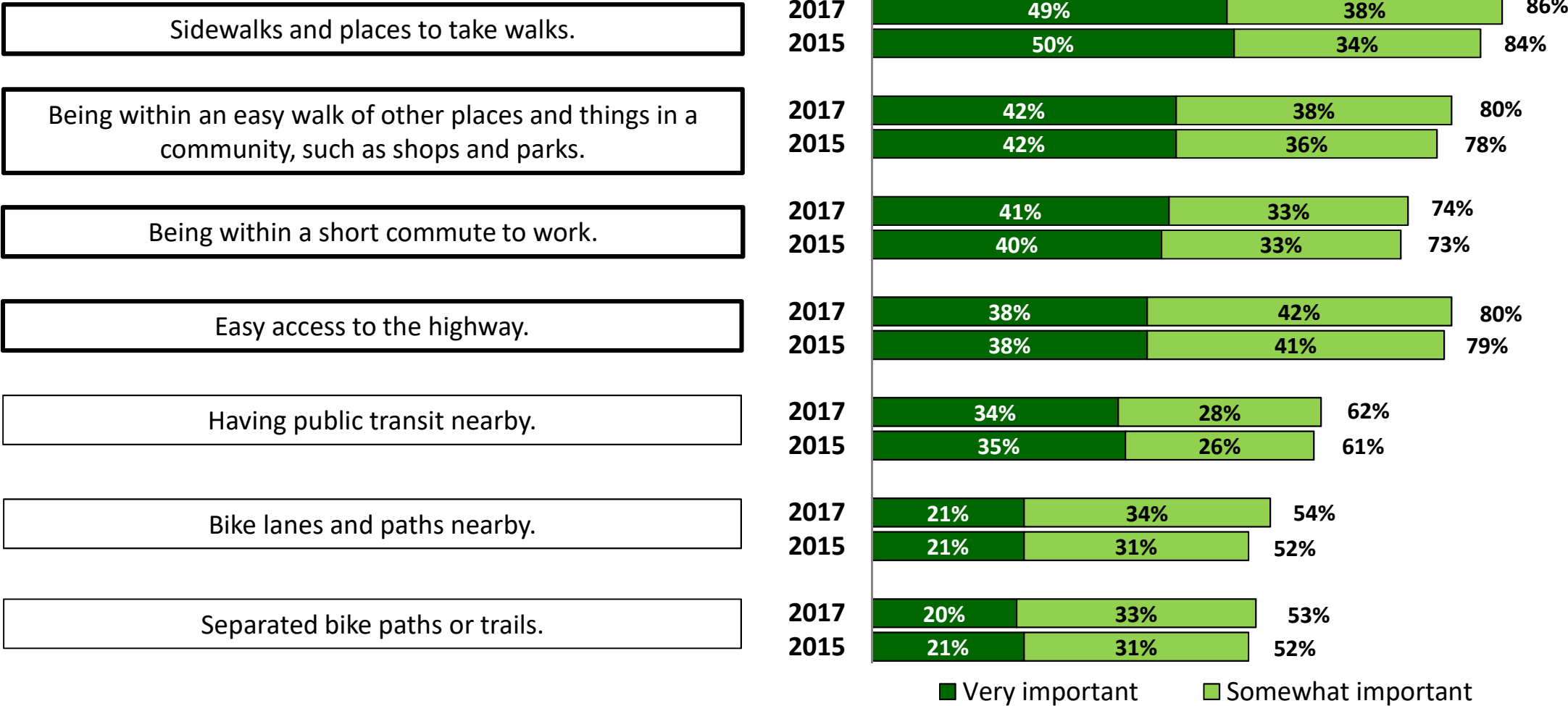
The first question is about the quality of life in your community. How satisfied would you say you are with the quality of life in your community?

What's Important in Deciding Where to Live

Walkability and Short Work Commute Most Important in Deciding Where to Live

Access to the highway remains more important than access to public transit or bike lanes

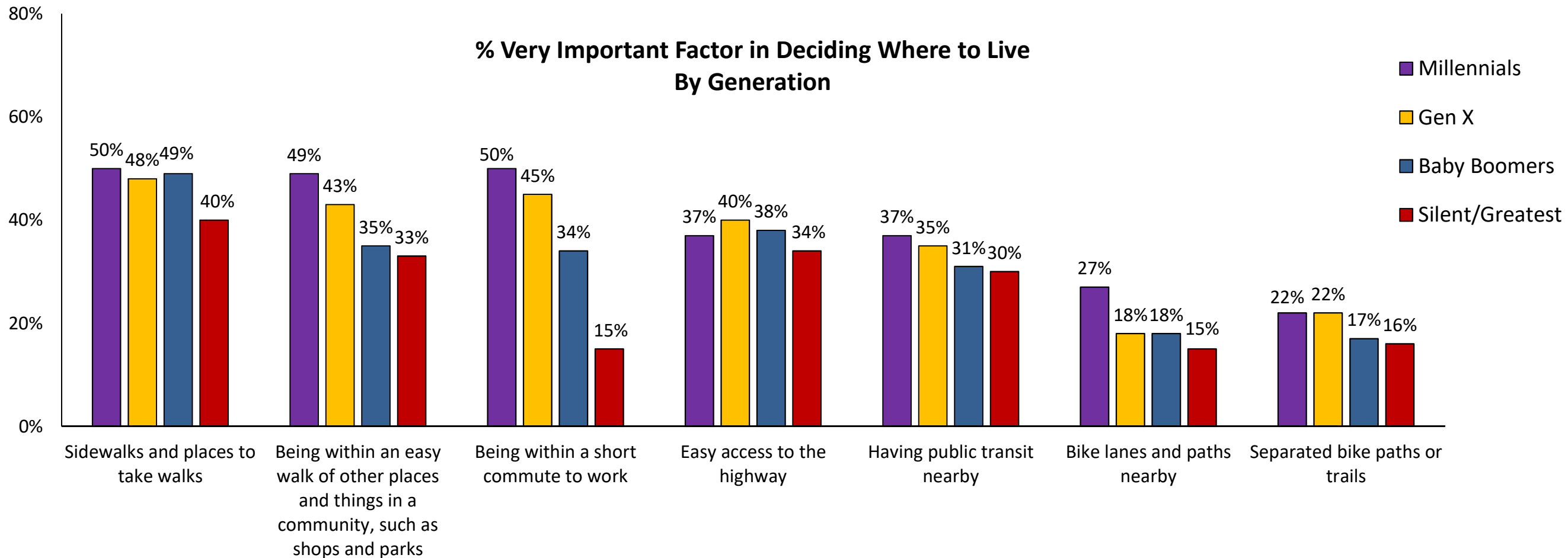
Most Important Factors in Deciding Where to Live:



If you were deciding today where to live, please indicate how important each of the following would be to you:

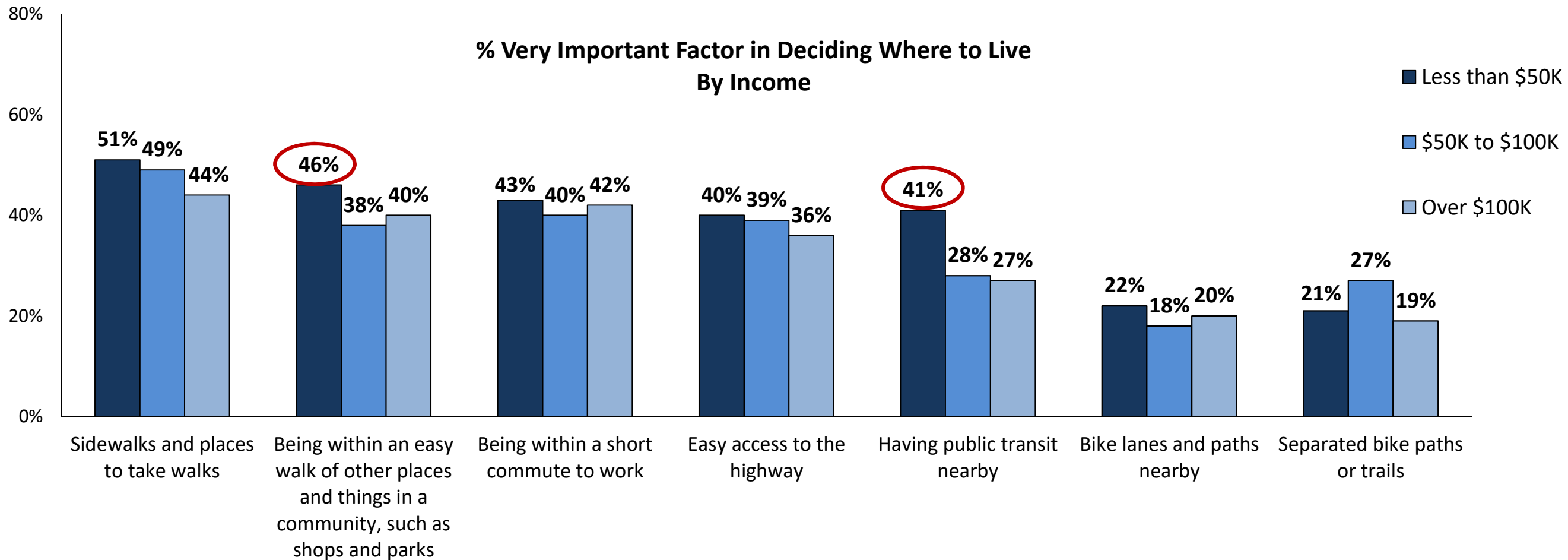
Millennials & Gen Xers Prioritize Walkability and a Short Commute More than Previous Generations

Millennials see having public transit nearby as equally important to highway access



If you were deciding today where to live, please indicate how important each of the following would be to you:

Walkability and Public Transit Nearby More Important to Lower Income Americans

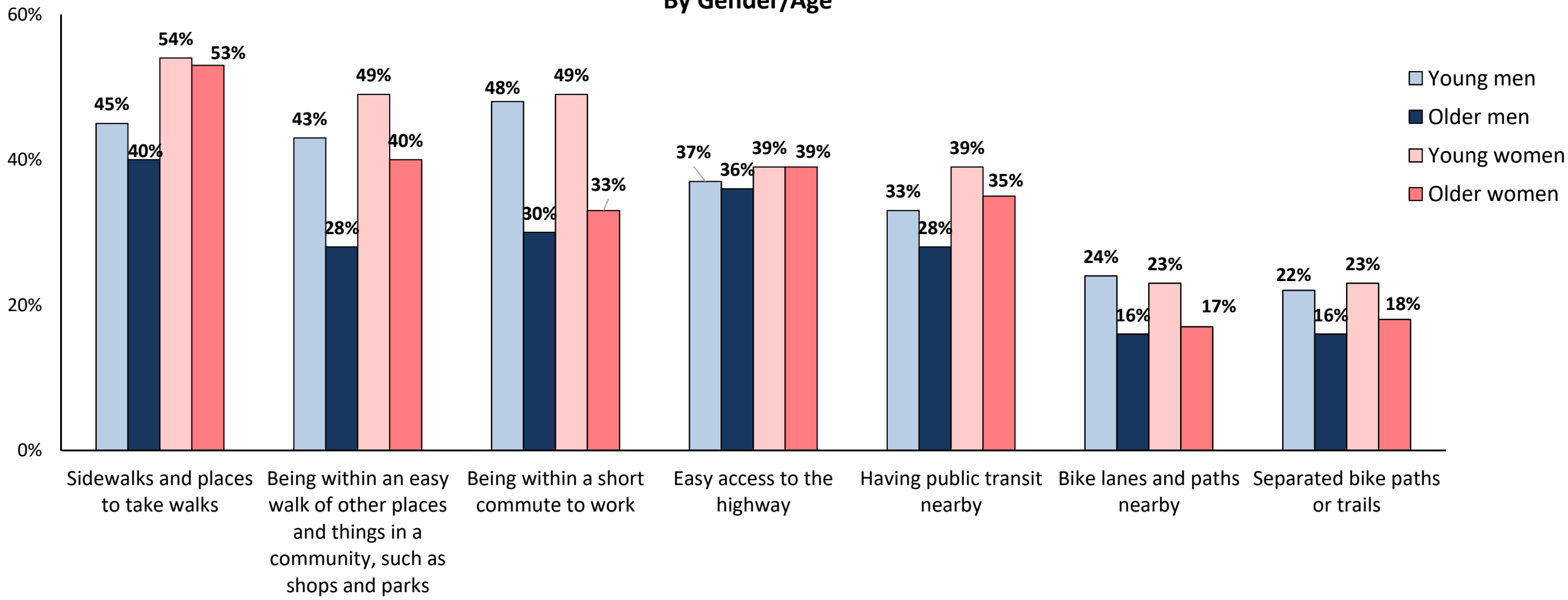


If you were deciding today where to live, please indicate how important each of the following would be to you:

Women – Particularly Younger Women – Prioritize Walkability and Public Transit

Importance of commute length tied to youth rather than gender

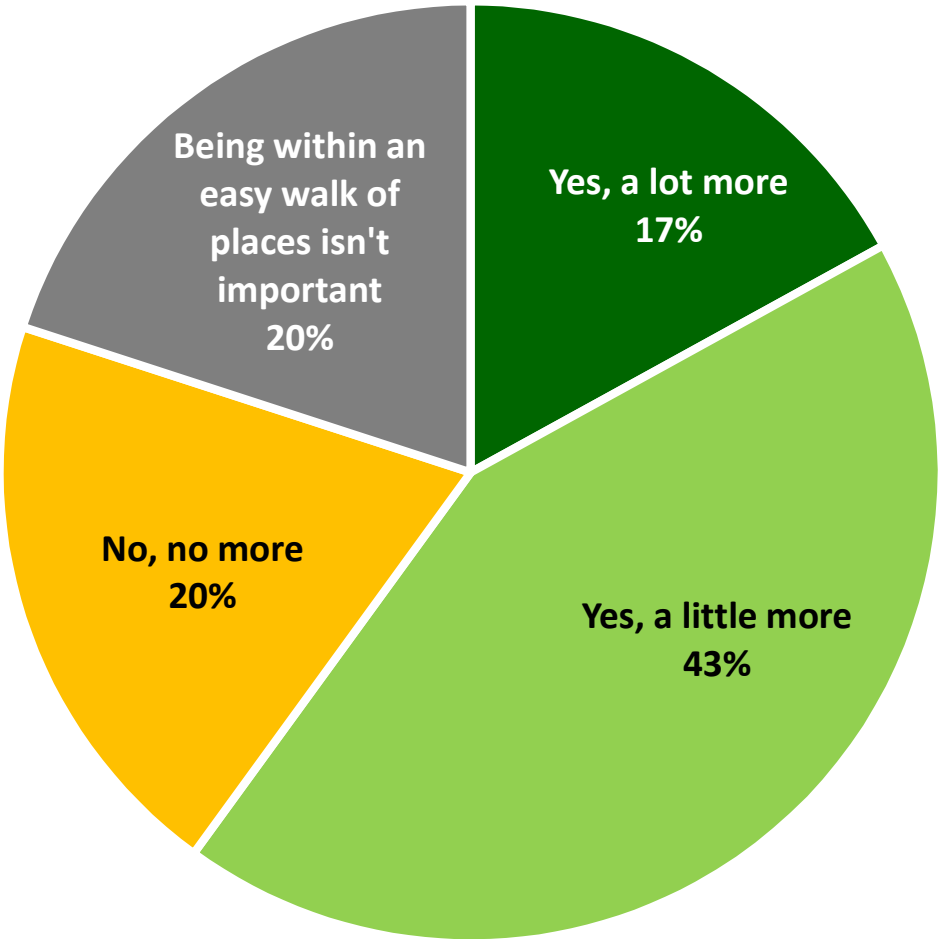
**% Very Important Factor in Deciding Where to Live
By Gender/Age**



If you were deciding today where to live, please indicate how important each of the following would be to you:

Six-in-Ten Would Pay More To Live in a Walkable Community

Willingness to Spend More to Live Within Walking Distance to Parks, Shops, and Restaurants

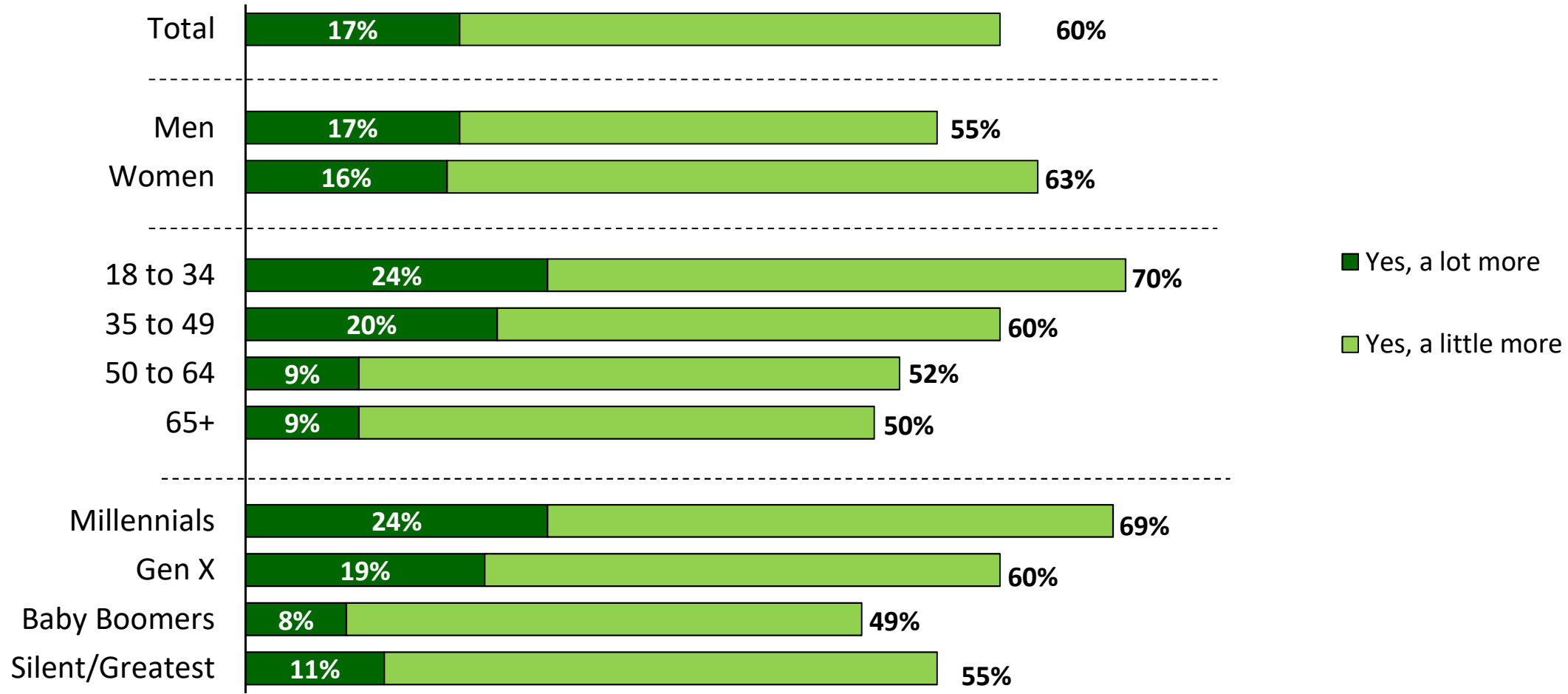


(IF VERY OR SOMEWHAT IMPORTANT ON IMPORT_A) If you were moving to a new home, would you be willing to spend more to live in a community where you could easily walk to parks, shops, and restaurants?

Under Age 50 and Millennials Willing to Spend More to Live in Walkable Community

Those in Silent/Greatest generation somewhat more interested in walkable communities than Baby Boomers

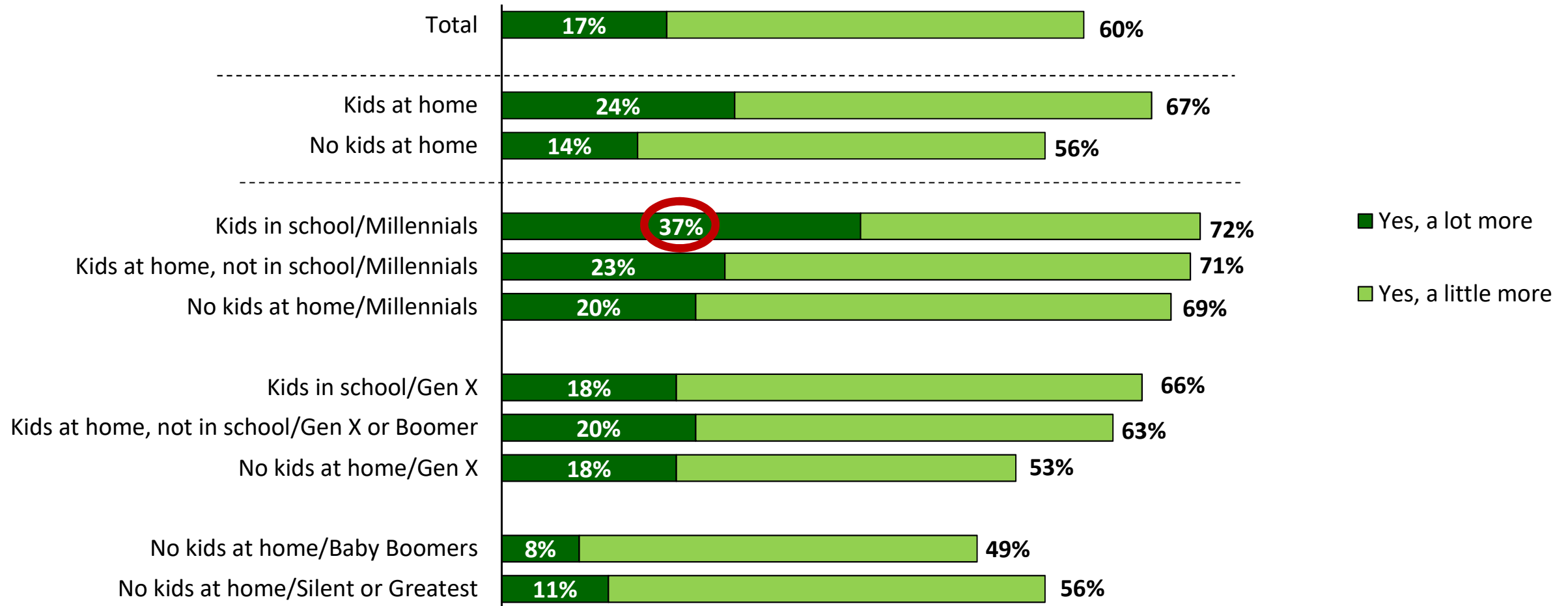
**Willingness to Spend More to Live Within Walking Distance to Parks, Shops, and Restaurants
By Key Demographics**



(IF VERY OR SOMEWHAT IMPORTANT ON IMPORT_A) If you were moving to a new home, would you be willing to spend more to live in a community where you could easily walk to parks, shops, and restaurants?

Families with Kids at Home, Especially Millennials with Kids in School, More Willing to Spend More to Live in a Walkable Community

Willingness to Spend More to Live Within Walking Distance to Parks, Shops, and Restaurants
By Key Demographics



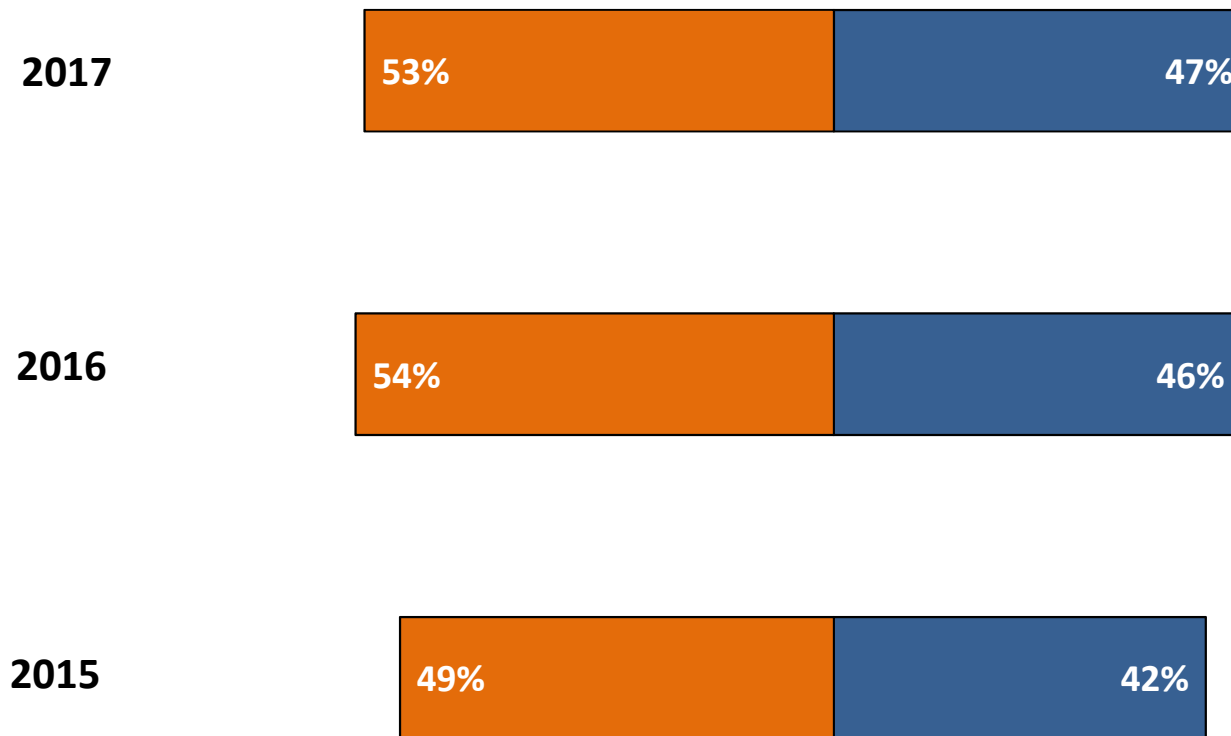
(IF VERY OR SOMEWHAT IMPORTANT ON IMPORT_A) If you were moving to a new home, would you be willing to spend more to live in a community where you could easily walk to parks, shops, and restaurants?

*Mixed Use Community v.
Conventional Suburban Community*

Americans Remain Split on Preference Between Walkable, Mixed-Use Community and Conventional Suburban Community

Slight majority continues to prefer walkable community with small yards

Preferred Community:



Houses with small yards and it is easy to walk to the places you need to go.

Houses with large yards and you have to drive to the places where you need to go.

Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. Please select the community that you prefer.

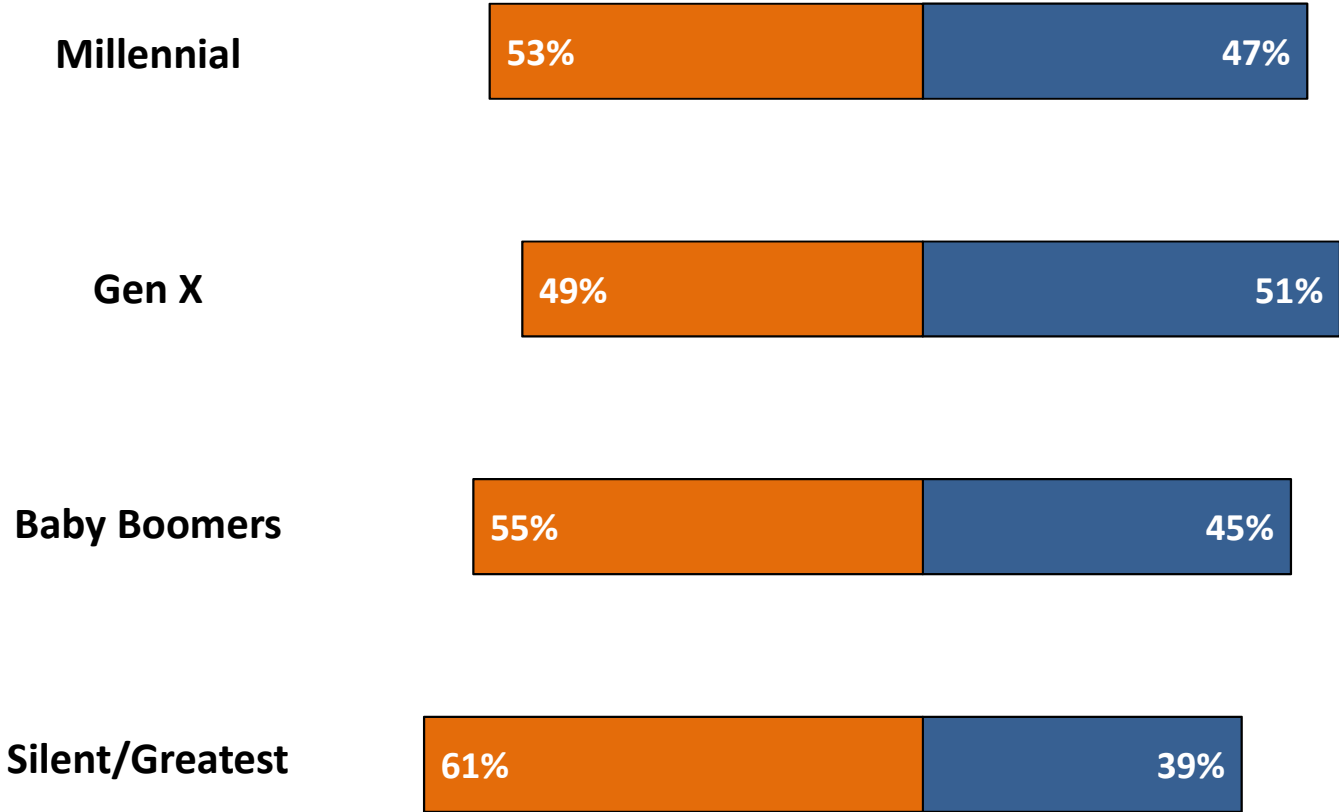
Older Generations Most Likely to Prefer Small Yard and Walkable Community

Only Gen Xers entirely split on preference; Millennials now mirroring Boomers

Preferred Community by Generation

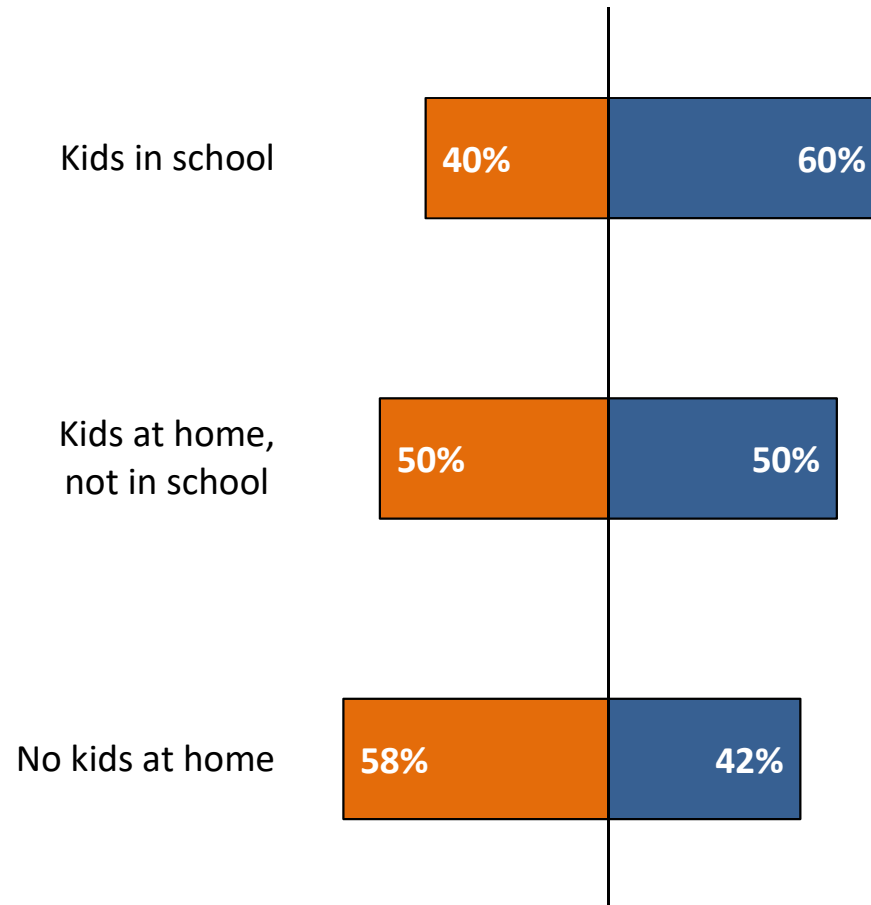
Houses with small yards and it is easy to walk to the places you need to go.

Houses with large yards and you have to drive to the places where you need to go.

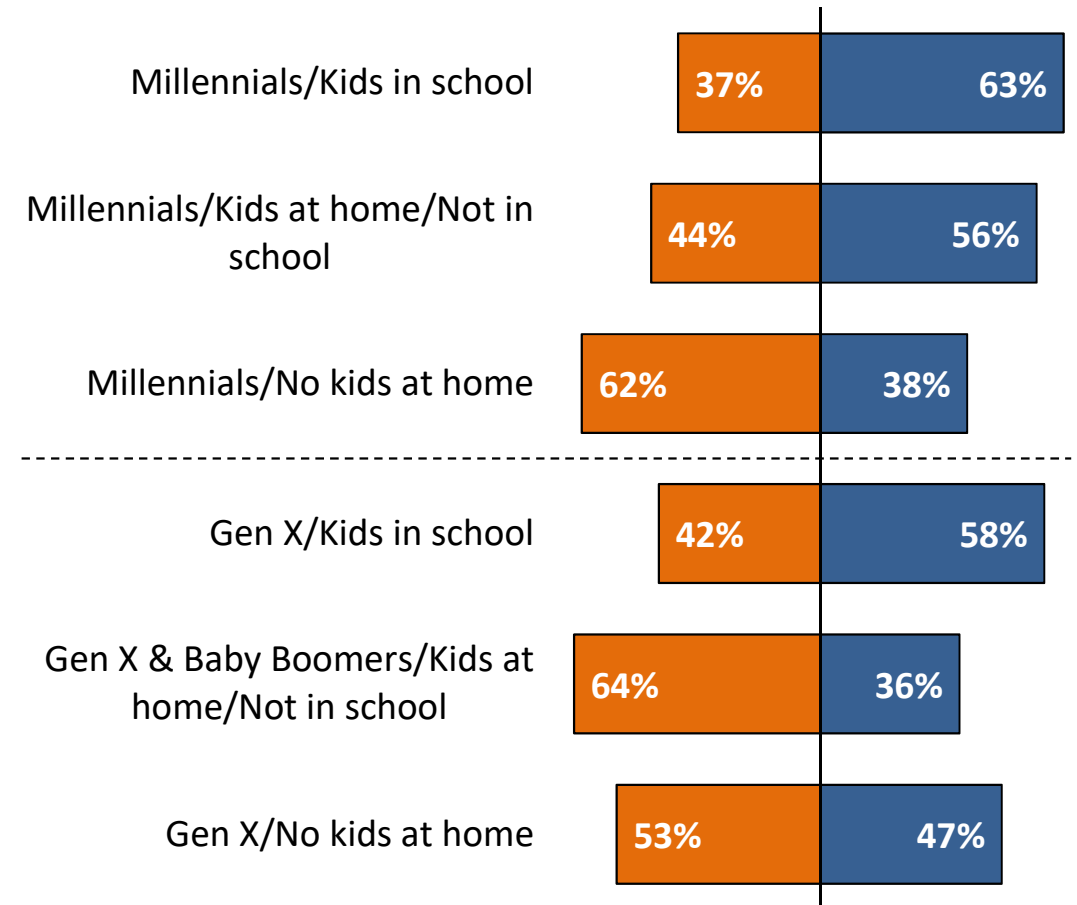


Those with Kids in School – Regardless of Generation – More Likely to Prefer Conventional Suburban Community

Preferred Community by Kid Status



Preferred Community by Kid Status /Generation



Houses with **small yards** and it is **easy to walk** to the places you need to go.

Houses with **large yards** and you **have to drive** to the places where you need to go.

Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. Please select the community that you prefer.

Marital Status, Age, and Lack of Kids at Home Drive Preference for Walkable Community

Ideology, race, and urbanicity also play a role

Community B (Small yard, Walk to places):
*Houses with small yards and it is easy to walk
to the places you need to go.*

Total Prefer: 53%

Very liberal (69%)

City resident (64%)

Widowed (64%)

Women over 50 (63%)

Unmarried without kids (62%)

New York City (62%)

Seniors (61%)

African American (60%)

Renter (60%)

Hispanic/Latino (58%)

Single (58%)

College women (58%)

Income under \$50k (58%)

No kids at home (58%)

Community A (Large yard, Drive to places):
*Houses with large yards and you have to drive
to get to the places you need to go.*

Total Prefer: 47%

Very conservative (66%)

Kids in school, Millennials (63%)

Rural area (62%)

Live in suburbs with houses only (59%)

Kids in school, Gen X (58%)

Kids at home (57%)

Small town (56%)

\$75k to \$200k (56%)

Southwest (52%)

Non-College men (52%)

Men over 50 (52%)

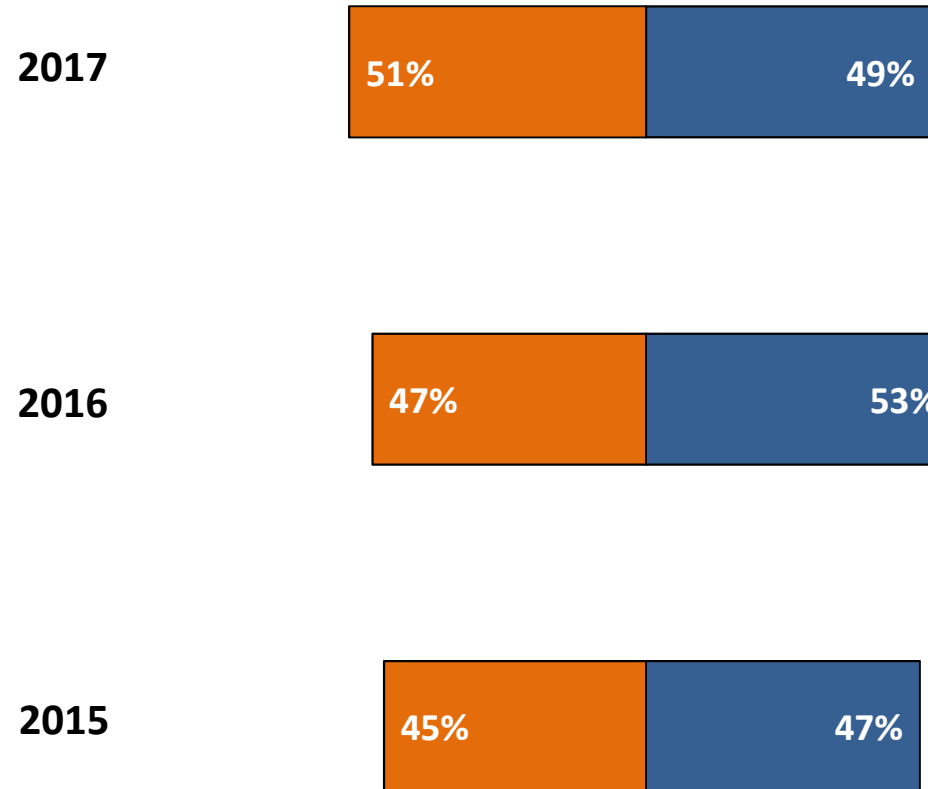
Age 35 to 49 (51%)

Homeowner (51%)

Please select the community where you would prefer to live:

Slight Trend Towards Greater Willingness to Give up Detached Home if it Means Living in a Walkable Community with Short Commute

Preferred Community:



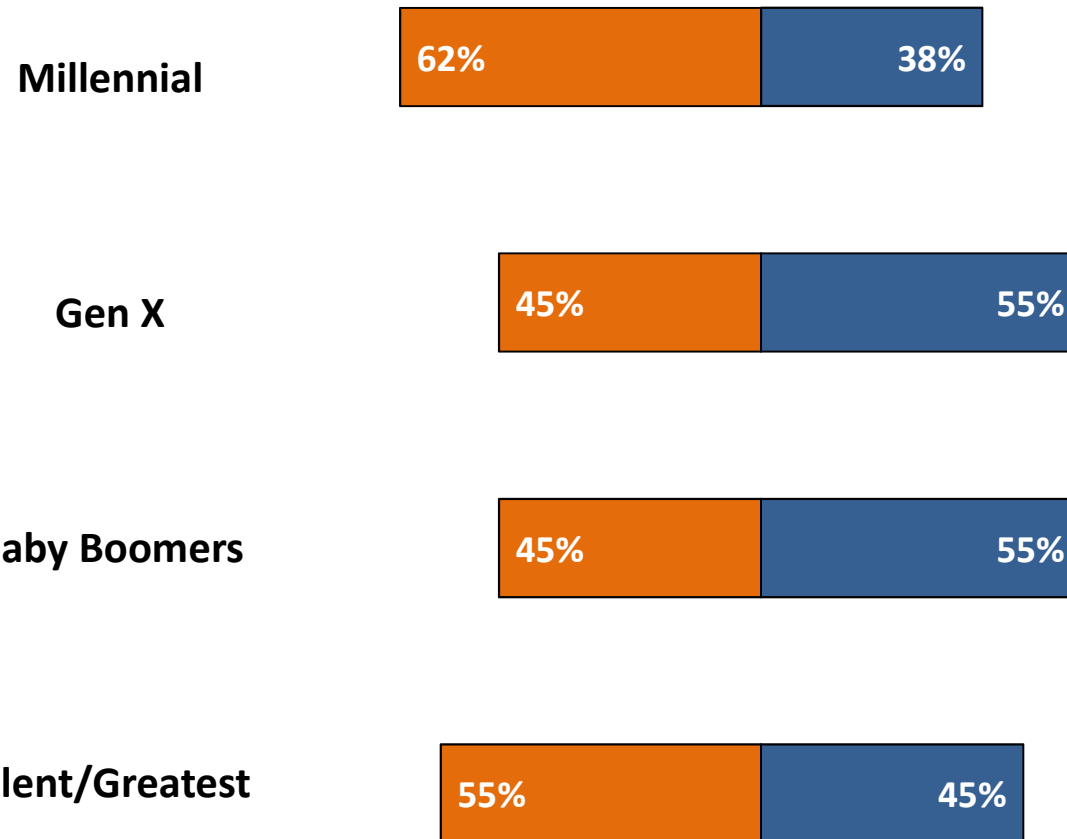
Own or rent an apartment or townhouse and you have an easy walk to shops and restaurants and have a shorter commute to work.

Own or rent a detached, single-family house and you have to drive to shops and restaurants and have a longer commute to work.

Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. Please select the community that you prefer.

Millennials and Silent/Greatest Generation Prefer Walkable Community and Short Commute Even If It Means Living in an Apartment or Townhouse

Preferred Community by Generation



Own or rent an apartment or townhouse and you have an easy walk to shops and restaurants and have a shorter commute to work.

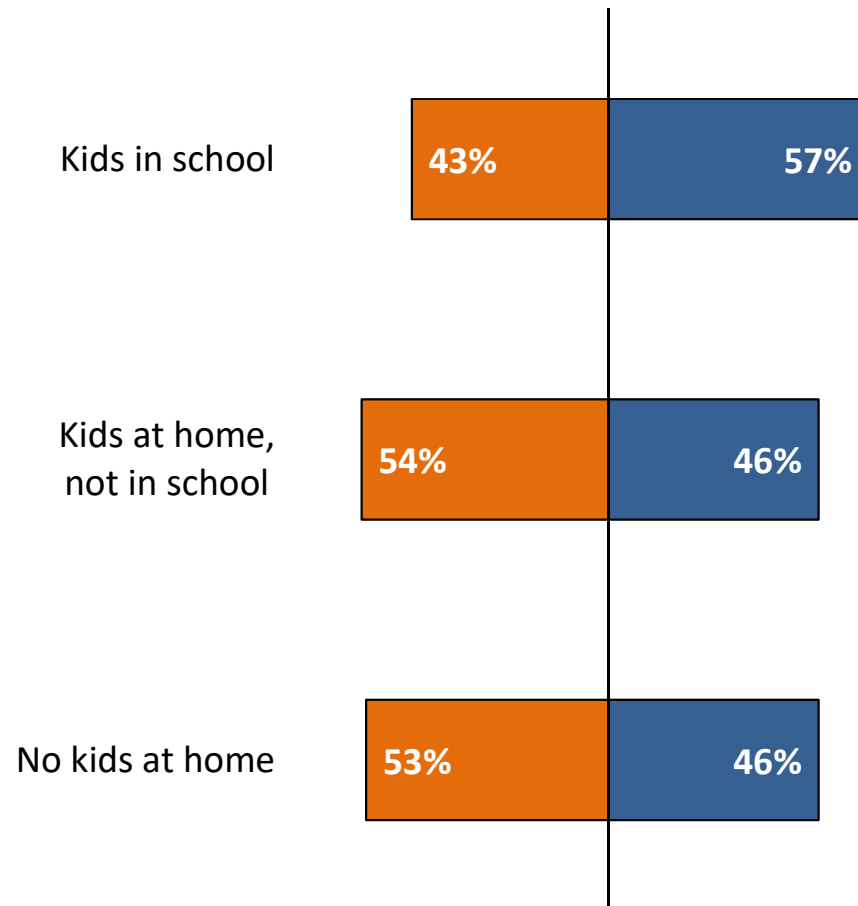
Own or rent a detached, single-family house and you have to drive to shops and restaurants and have a longer commute to work.

Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. Please select the community that you prefer.

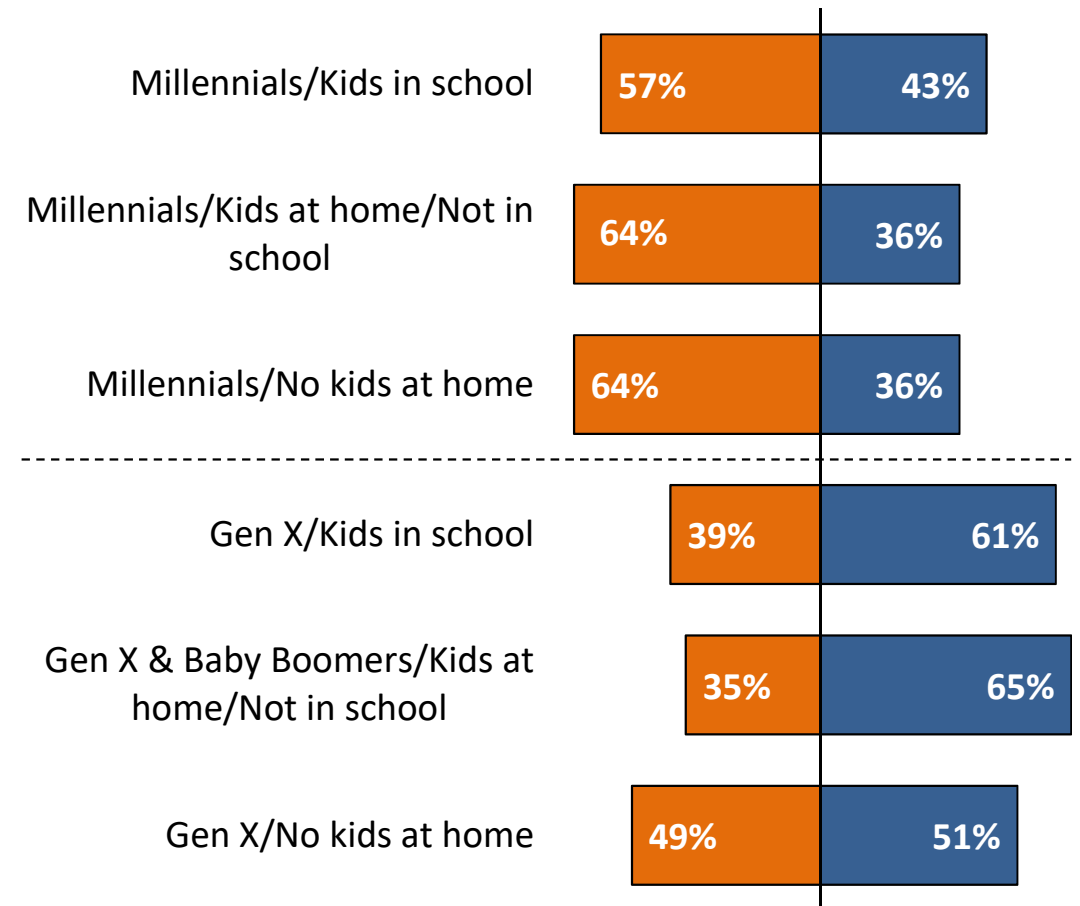
Millennials' Desire For Short Commute Trumps Desire for Detached Home

Gen Xers, especially with kids at home, remain committed to detached home

Preferred Community by Kid Status



Preferred Community by Kid Status / Generation



Own or rent an **apartment or townhouse** and you have an **easy walk** to shops and restaurants and have a **shorter commute** to work.

Own or rent a **detached, single-family house** and you **have to drive** to shops and restaurants and have a **longer commute** to work.

Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. Please select the community that you prefer.

Urbanicity, Marital Status, and Generation Drive Preference For Walkable Community and Short Commute Even if It Means Living in Townhouse or Apartment

Rural and suburban residents, married, and Gen Xers with kids still prefer detached home

Community A (Apartment, Walk to places):

Own or rent an apartment or townhouse and have an easy walk to shops and restaurants and have a shorter commute to work.

Total prefer: 51%

New York City (69%)

City (65%)

Income under \$15k (64%)

No kids or not school age, Millennials (64%)

Very liberal (63%)

Renters (63%)

Single (61%)

Unmarried without kids at home (61%)

African American (60%)

Los Angeles (59%)

Kids in school, Millennials (57%)

Community B (House, Drive to places):

Own or rent a detached, single-family house and you have to drive to shops and restaurants and have a longer commute to work.

Total prefer: 49%

Rural area (69%)

Very conservative (64%)

Live in suburbs with houses only (62%)

Kids in school, Gen-X (61%)

Income between \$75k and \$100k (59%)

Married without kids at home (59%)

Home owners (58%)

Men over 50 (58%)

Married (58%)

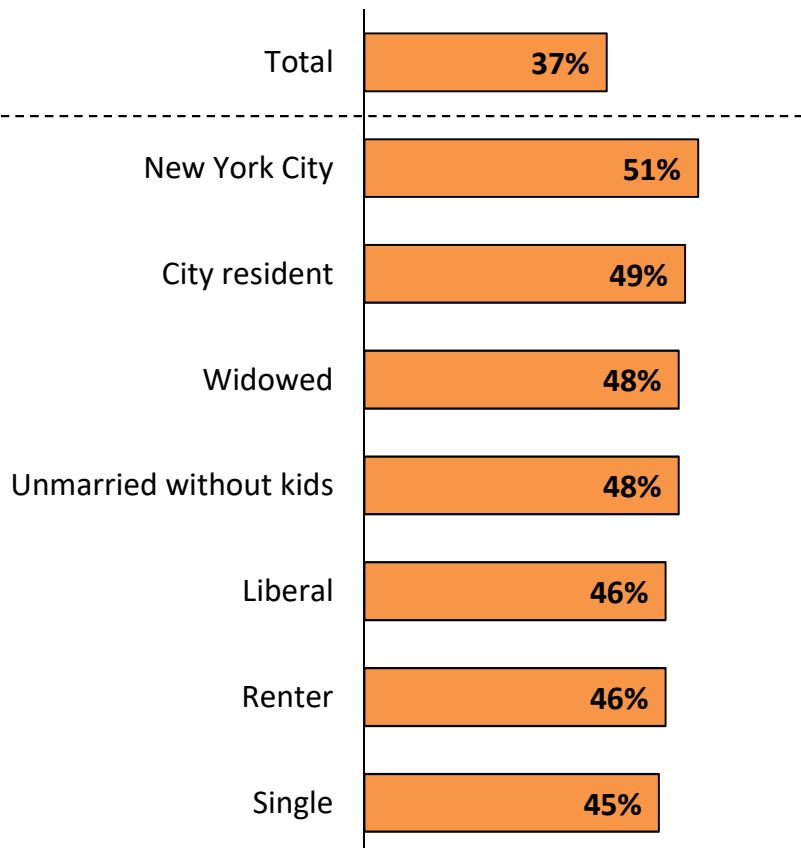
Southwest (55%)

Please select the community where you would prefer to live:

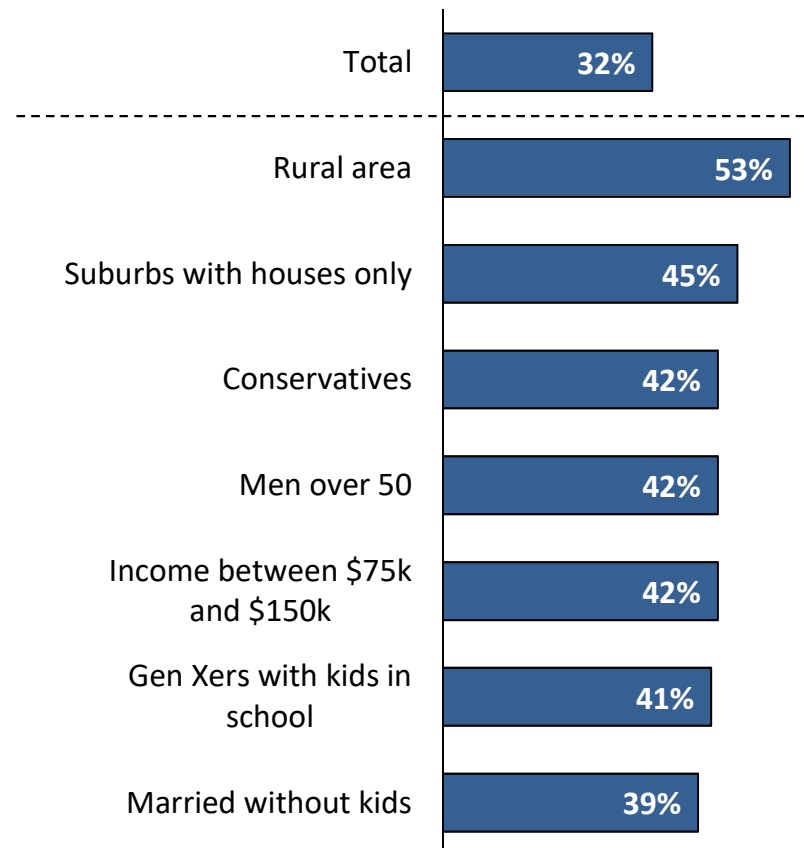
Those Inconsistent in their Community Preference More Likely to Be Millennials with Kids in School, Have Kids at Home, or Live in Small Towns

Los Angeles residents, West Coast residents, and Hispanics also more conflicted

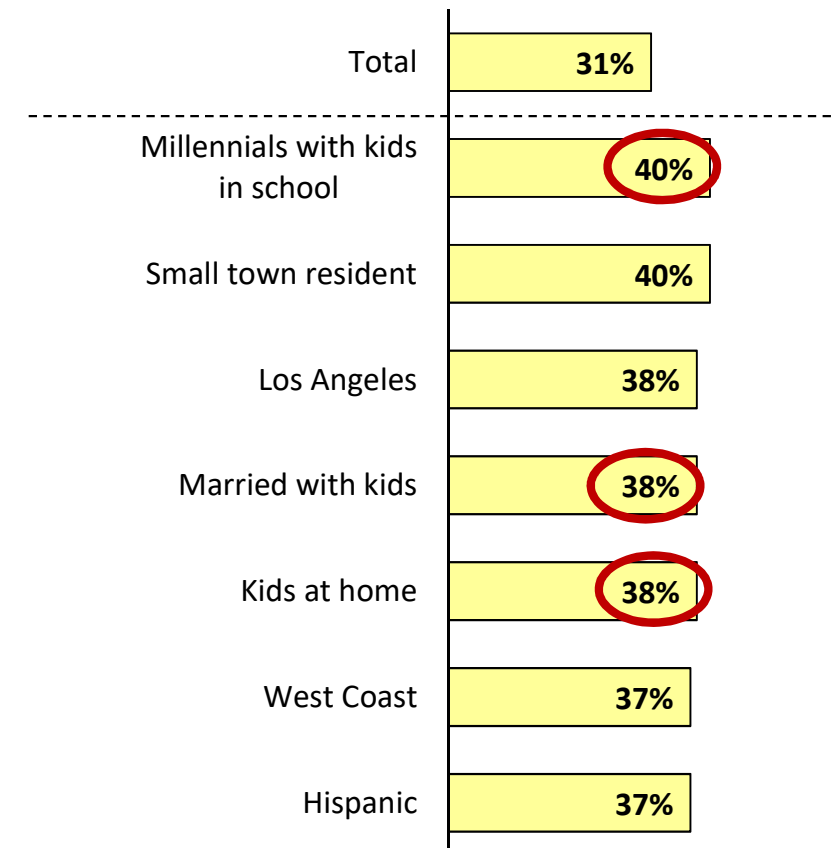
Most Likely to Consistently Prefer Walkable Community



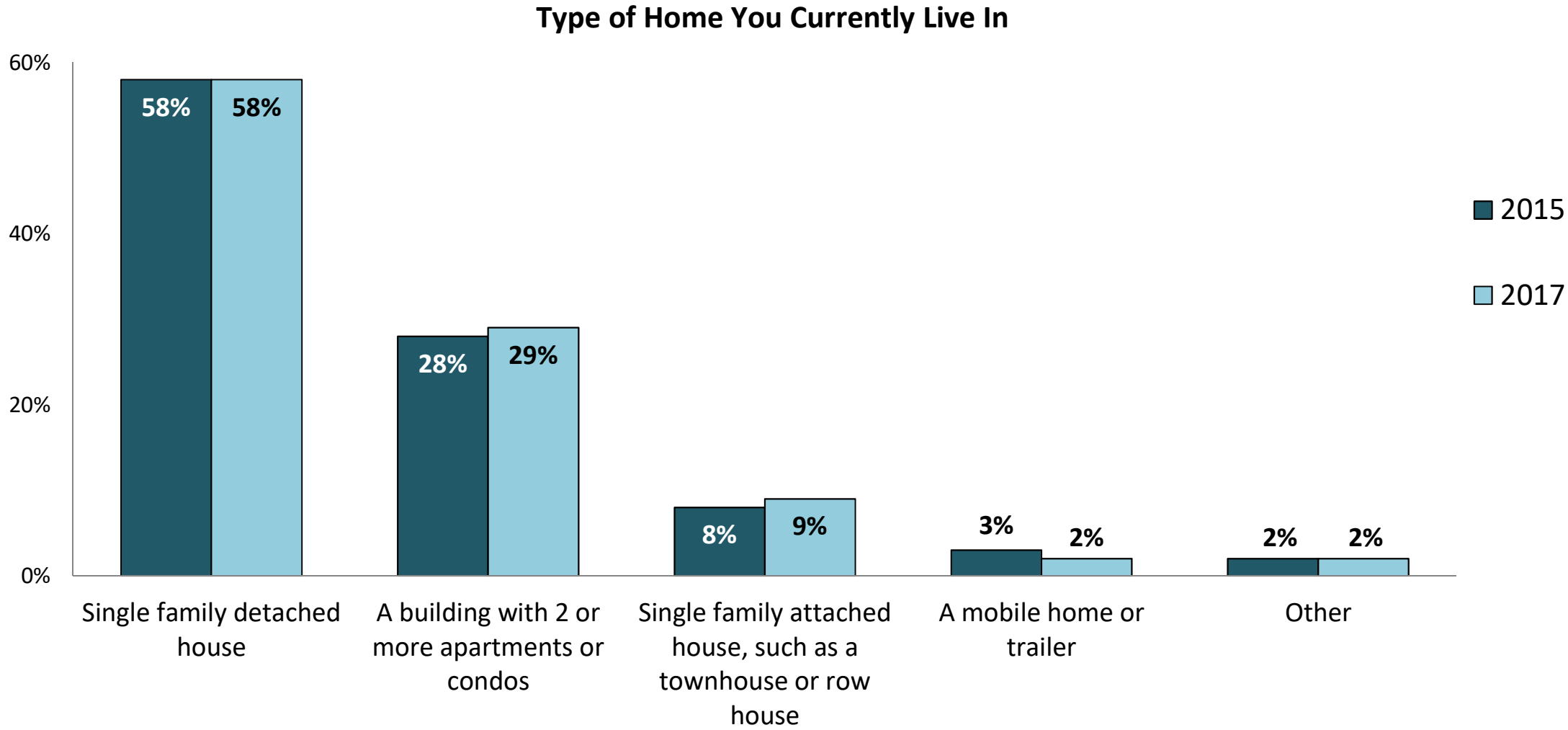
Most Likely to Consistently Prefer Drivable Community



Most Likely to Be Inconsistent in Community Preference















Majority of Those in Top 50 MSAs Live in a Detached Single Family Homes; No Change from 2015



Do you live in:

One-in-Five Living in a Detached Home Currently Would Prefer to Live in an Attached Home in a Walkable Community with Shorter Commute

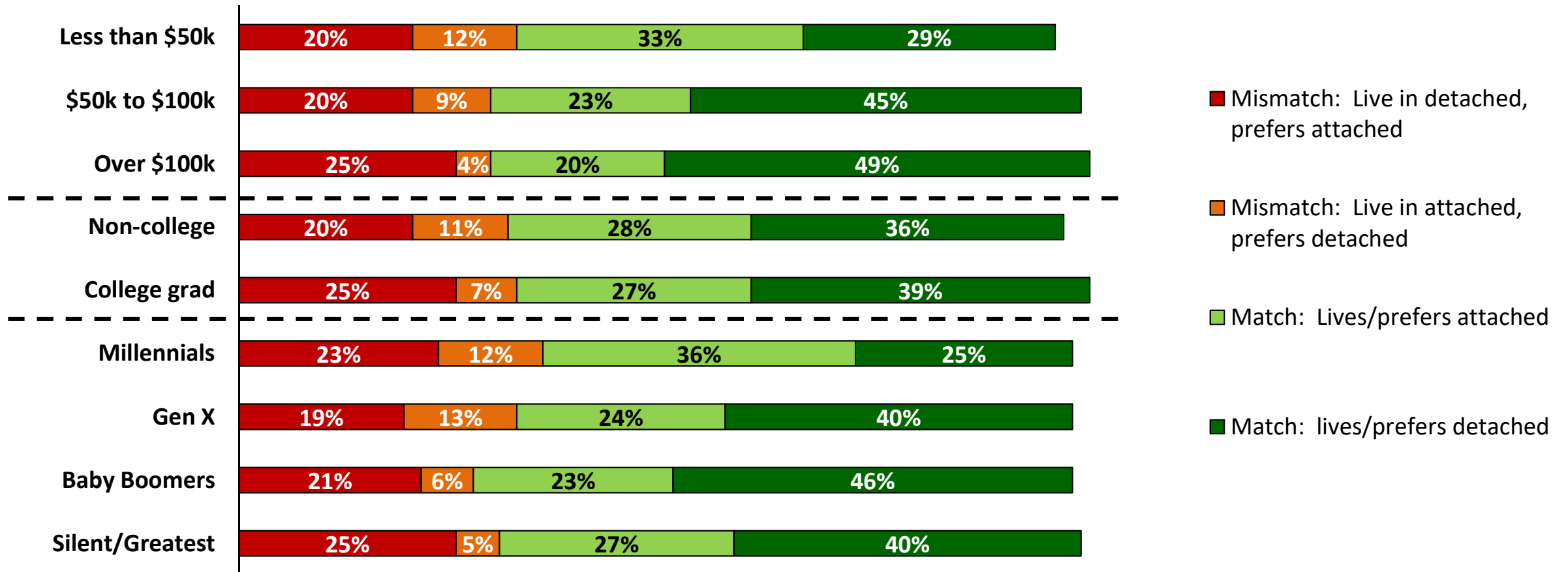
Chart Title

	Lives in	Prefers	%
Mismatched	 Detached home	Apartment/townhouse in <u>walkable neighborhood</u>  	21%
	 Attached home	Detached home in <u>conventional neighborhood</u>  	10%
Matched	 Attached home	Apartment/townhouse in <u>walkable neighborhood</u>  	28%
	 Detached home	Detached home in <u>conventional neighborhood</u>  	37%

Mismatched Residents Who Live in Detached Homes But Prefer Attached Home (Walkable and Shorter Commute) More Likely to Be Wealthier, Older, and College Educated

Millennials also more conflicted about community choice

House Preference/Current House By Income Level and Education Level

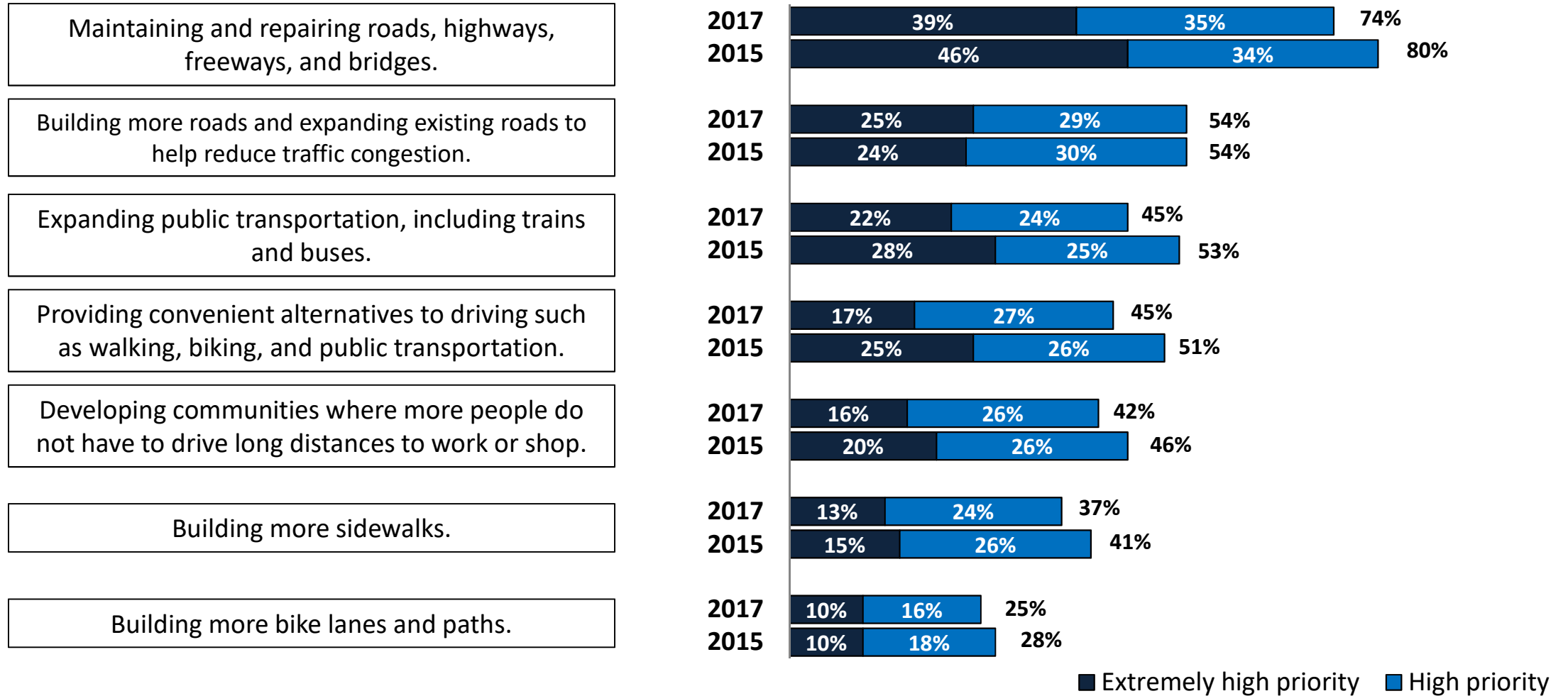


Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. Please select the community that you prefer.

Transit and Transportation

Maintaining Roads, Highways, and Bridges Remains Clear Priority

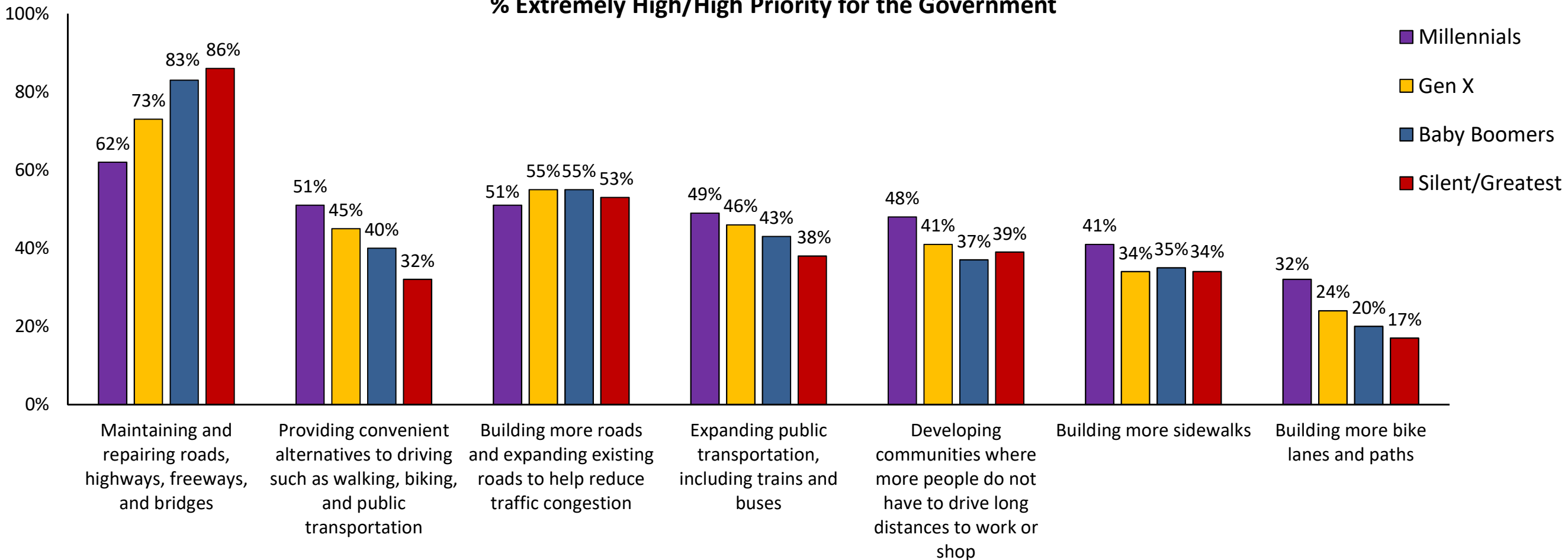
Issue Priority for the Government



Here are some issues your community may be facing over the next few years. For each one, please indicate how much of a priority it should be for the government:

Though Still a Top Priority, Millennials and Gen Xers Less Focused on Road Maintenance; Place a Higher Priority on Transportation Alternatives

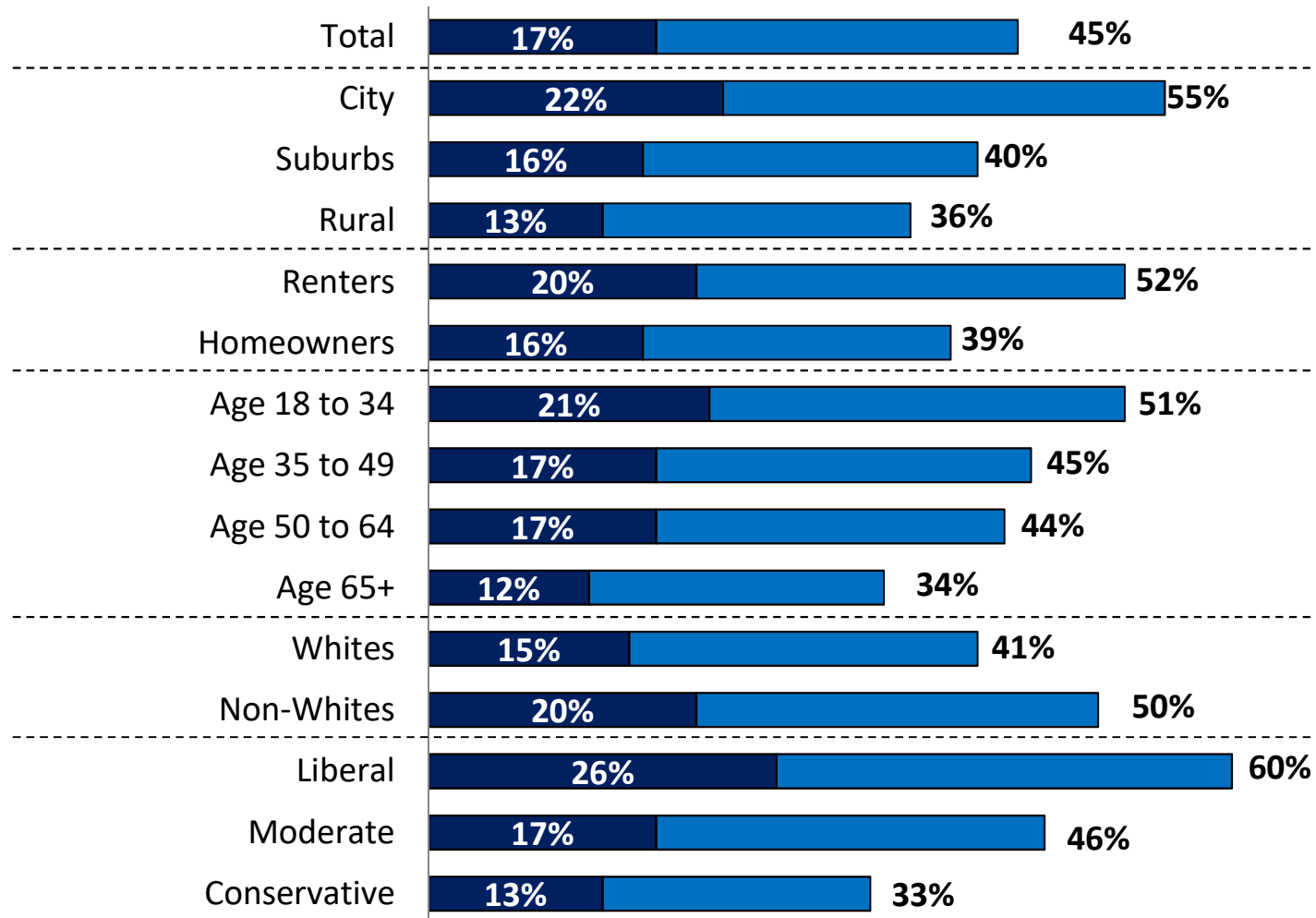
% Extremely High/High Priority for the Government



Here are some issues your community may be facing over the next few years. For each one, please indicate how much of a priority it should be for the government:

Liberals, Urban, Renters, Younger and Non-White Americans Place Higher Priority On Alternatives to Driving

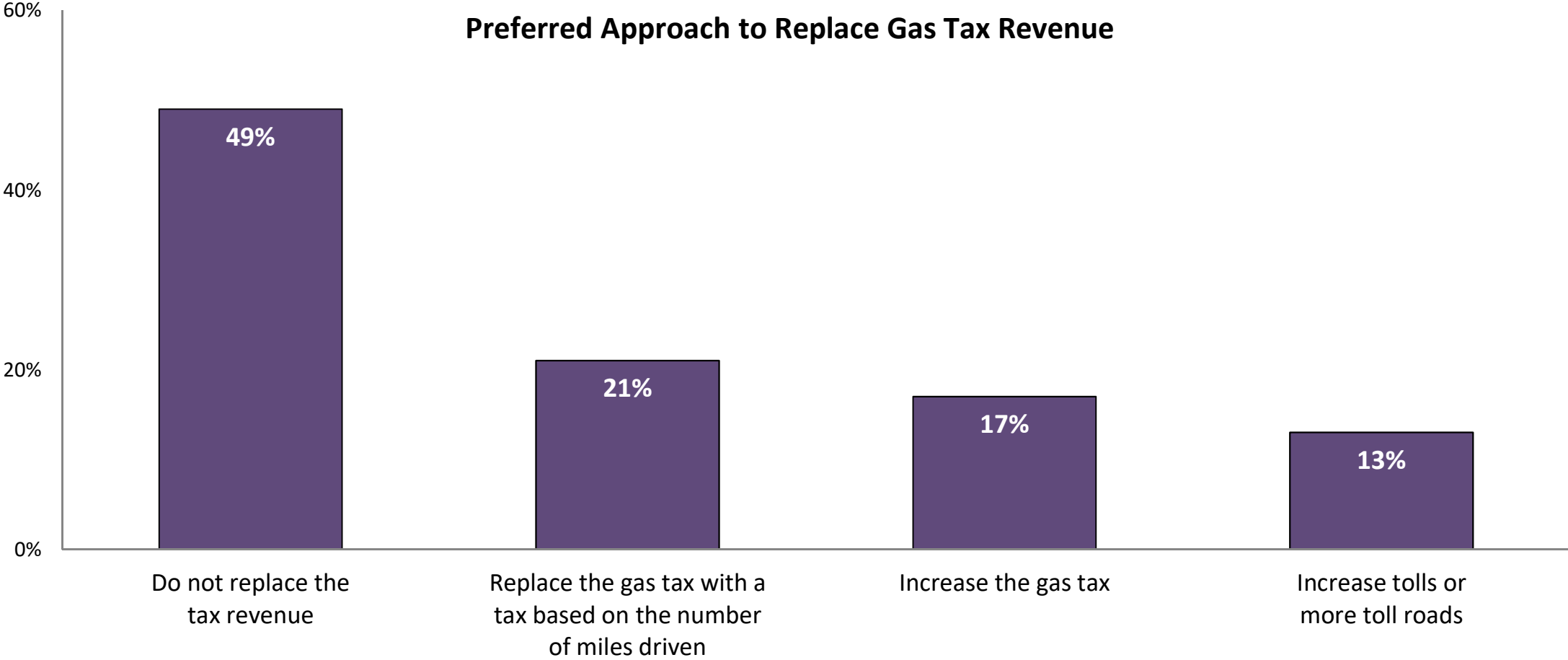
Providing Alternatives to Driving: Percent High Priority by Demographics



Here are some issues your community will be facing over the next few years. For each one please indicate how much of a priority it should be for your community to address: Should it be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for your state government?
 Providing convenient alternatives to driving such as walking, biking, and public transportation

Nearly Half Would Prefer Not to Replace Shrinking Gas Tax Revenue

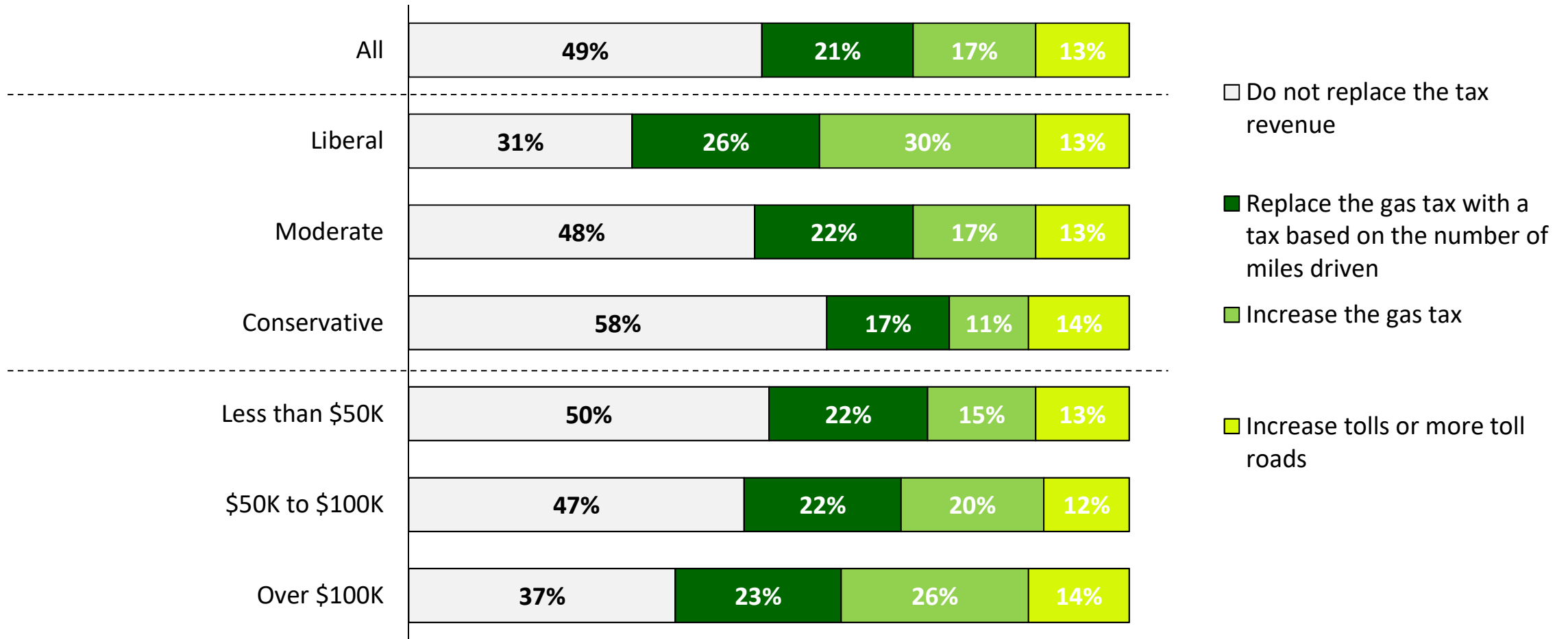
Among other half, slight preference for tax based on miles driven



Switching gears a bit, as you may know, increased fuel efficiency in cars has resulted in less gas tax funding to support roads and transit. Thinking about this, which ONE of the following approaches would you take to replace that tax revenue?

Ideology and Income Drive Interest in Replacing Gas Tax Revenue

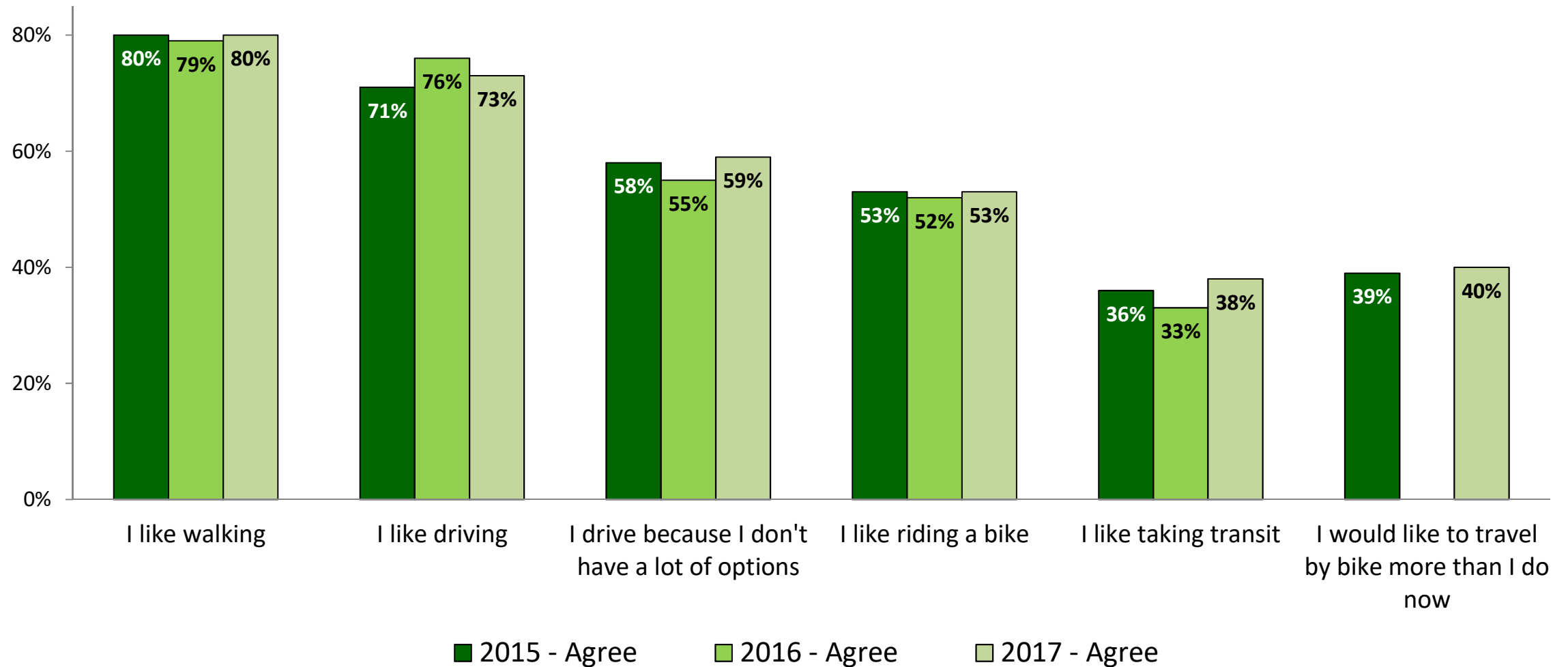
Preferred Approach to Replace Gas Tax Revenue by Ideology and Income



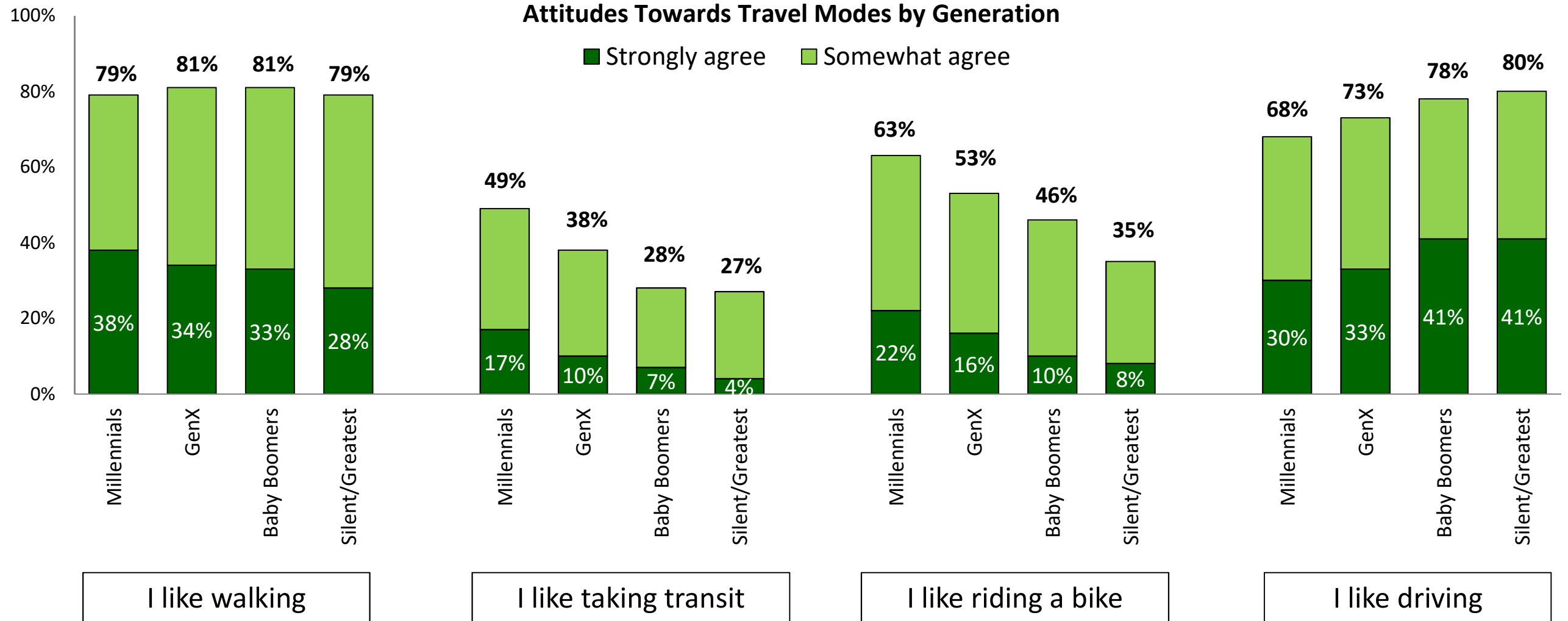
Switching gears a bit, as you may know, increased fuel efficiency in cars has resulted in less gas tax funding to support roads and transit. Thinking about this, which ONE of the following approaches would you take to replace that tax revenue?

Little Change in Daily Travel Preferences Over Past Two Years

Changes in Travel Preferences

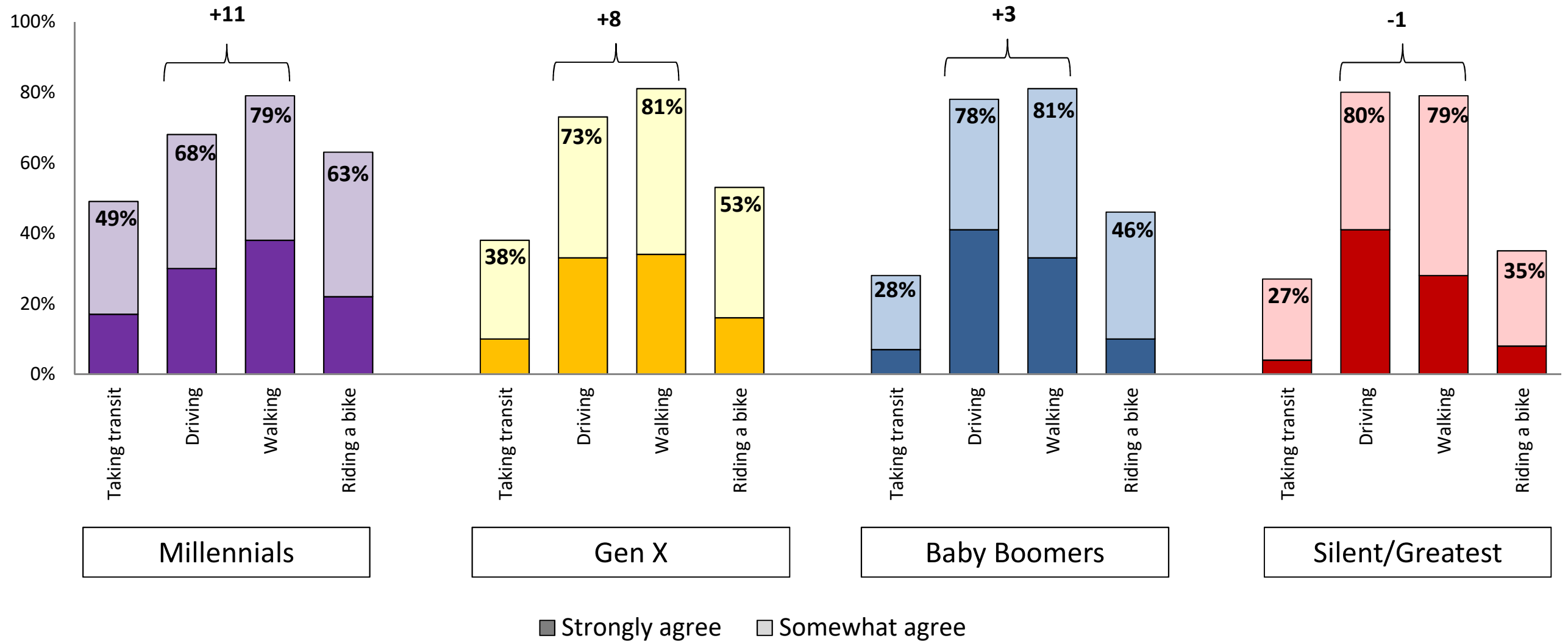


Everyone Likes Walking, But Millennials More Likely to Like Riding a Bike or Taking Transit, Somewhat Less Likely to Like Driving



While Everyone Likes Walking, Millennials and Gen Xers More Likely to Prefer it to Driving than Older Generations

Attitudes Towards Travel Modes by Generation



Millennials

Gen X

Baby Boomers

Silent/Greatest

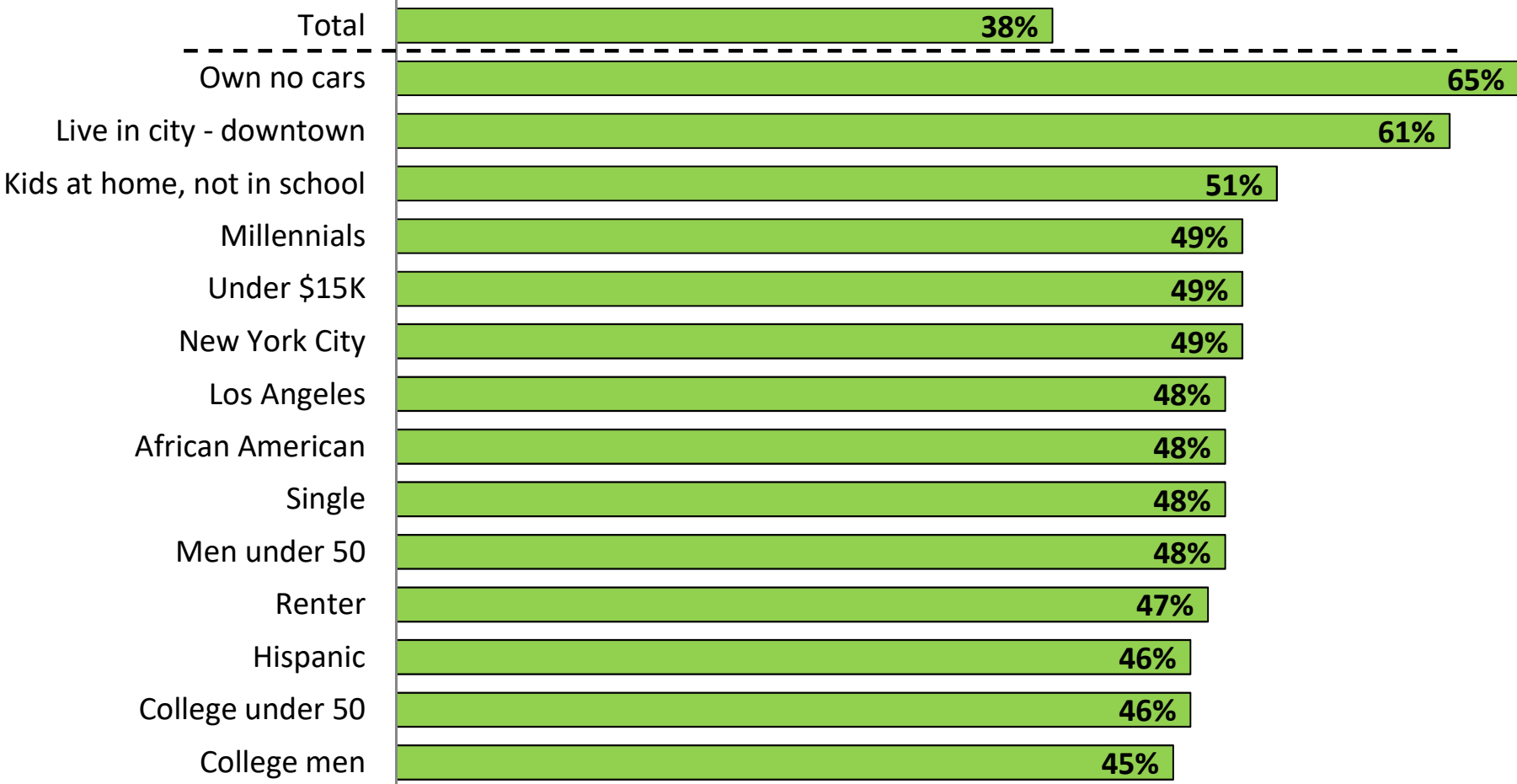
■ Strongly agree □ Somewhat agree

Now, we'd like to ask about your preferences regarding your daily travel.
For each statement, please tell me if you agree or disagree.

Those Who Most Like Taking Transit Own No Cars and Live Downtown

They tend to be millennials, have non-school-aged children at home, be non-white, and male

Percentage Saying They Like Taking Public Transit (% agree)

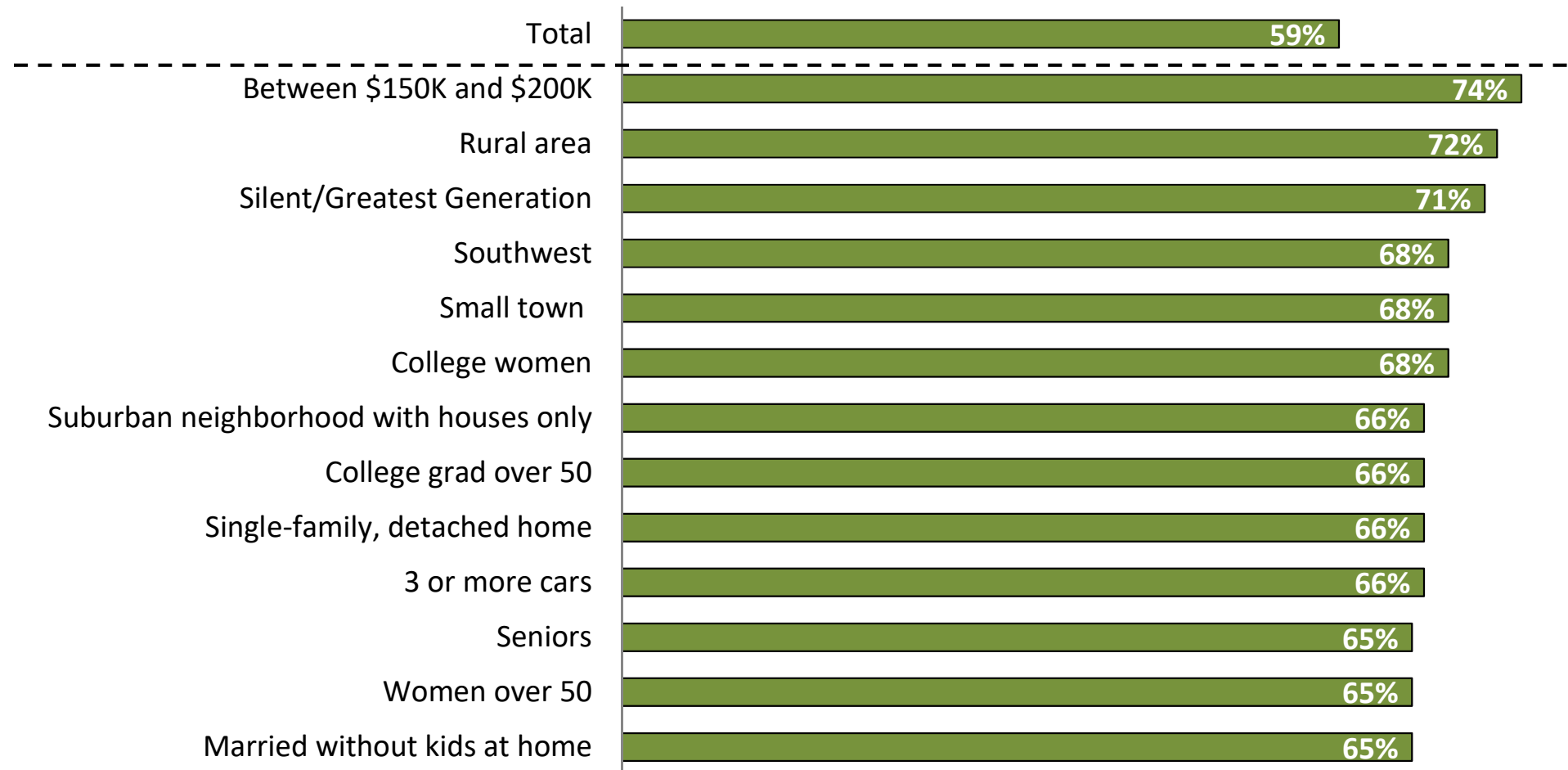


**Now we'd like to ask about your preferences regarding your daily travel.
For each statement, please tell me if you agree or disagree.**

Rural, Small Town, and Suburban Residents Drive More Due to Lack of Options

Wealthier, older, and female Americans also more likely to cite lack of options

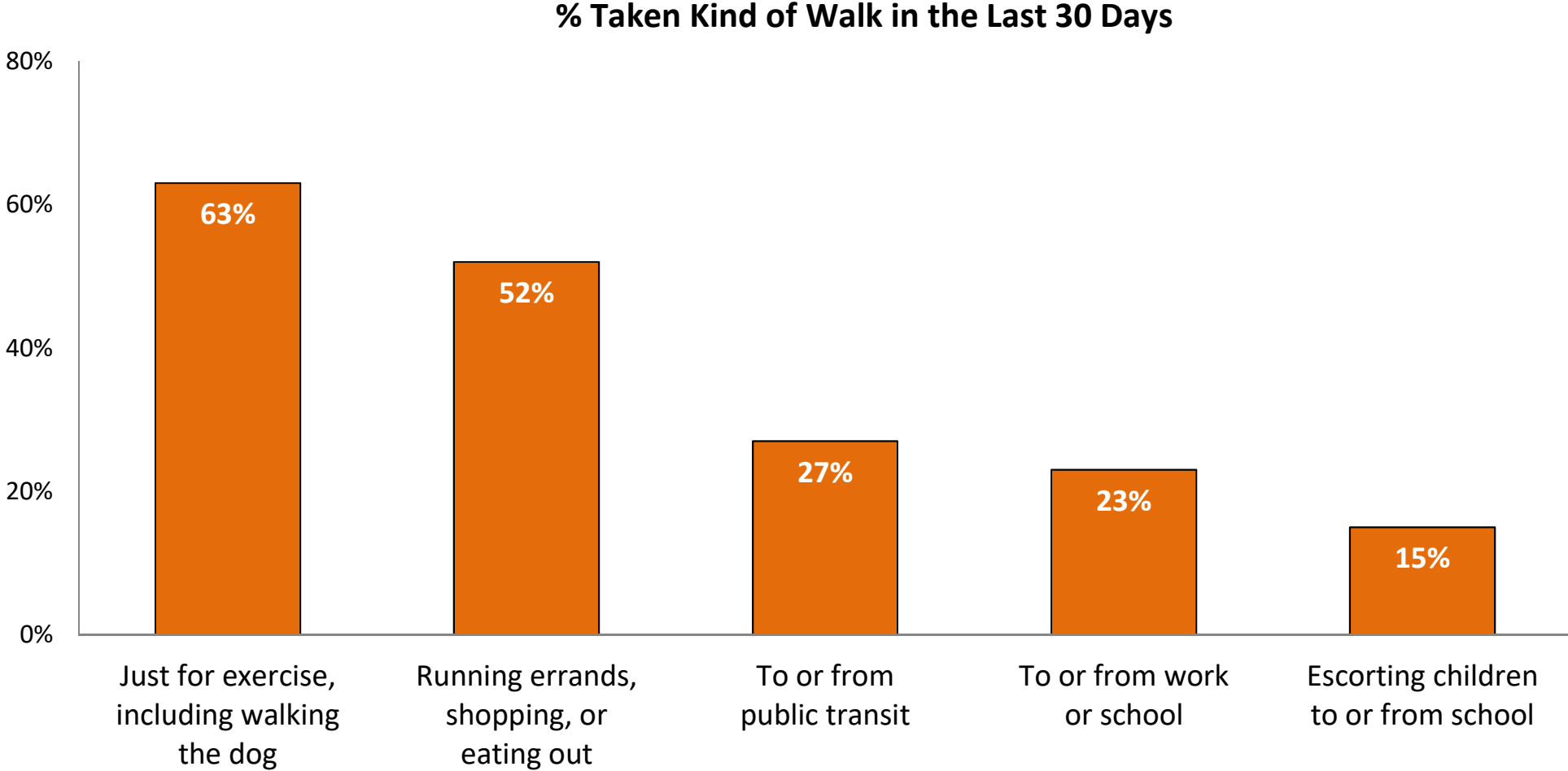
Percentage Saying They Drive Because They Don't Have Other Options (% agree)



Now we'd like to ask about your preferences regarding your daily travel.
For each statement, please tell me if you agree or disagree.

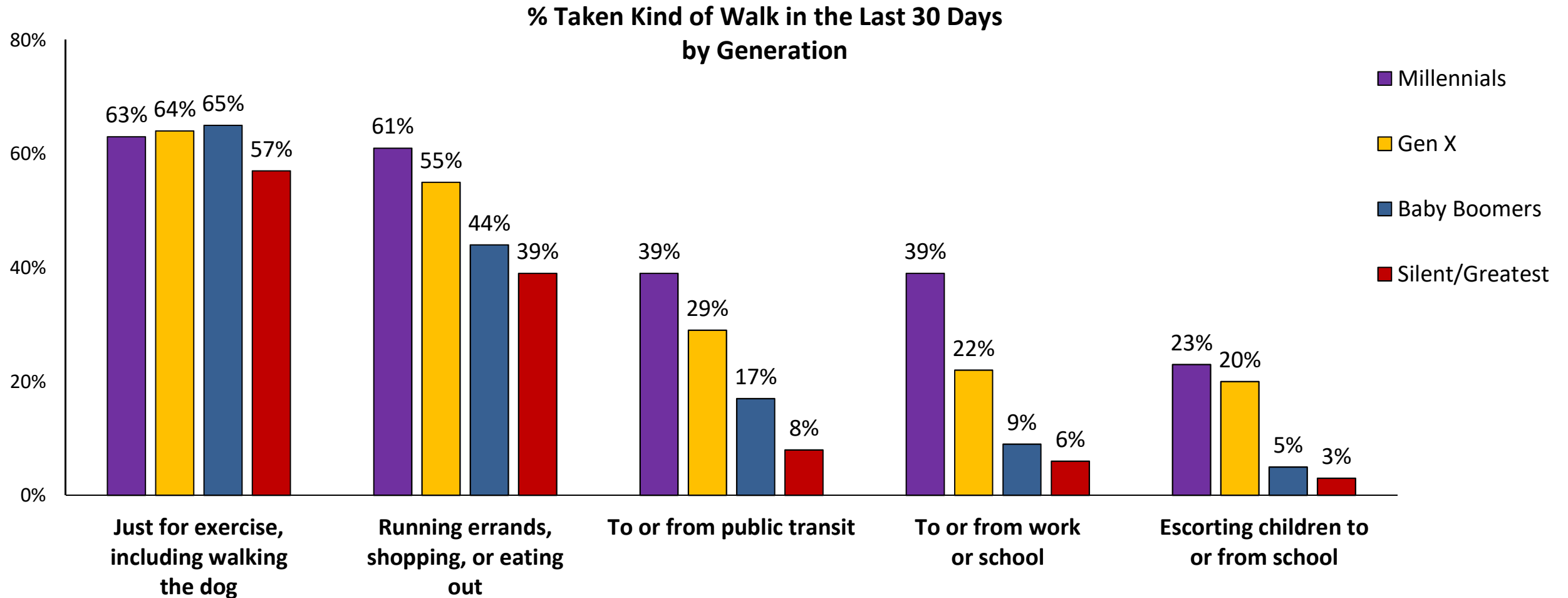
Walking

Nearly Two-Thirds Walk Just for Exercise or Walking the Dog; Half Walk to Run Errands, Shop, or Eat out



Here are some questions about walking in general. Have you taken any of the following kinds of walks in the last 30 days?

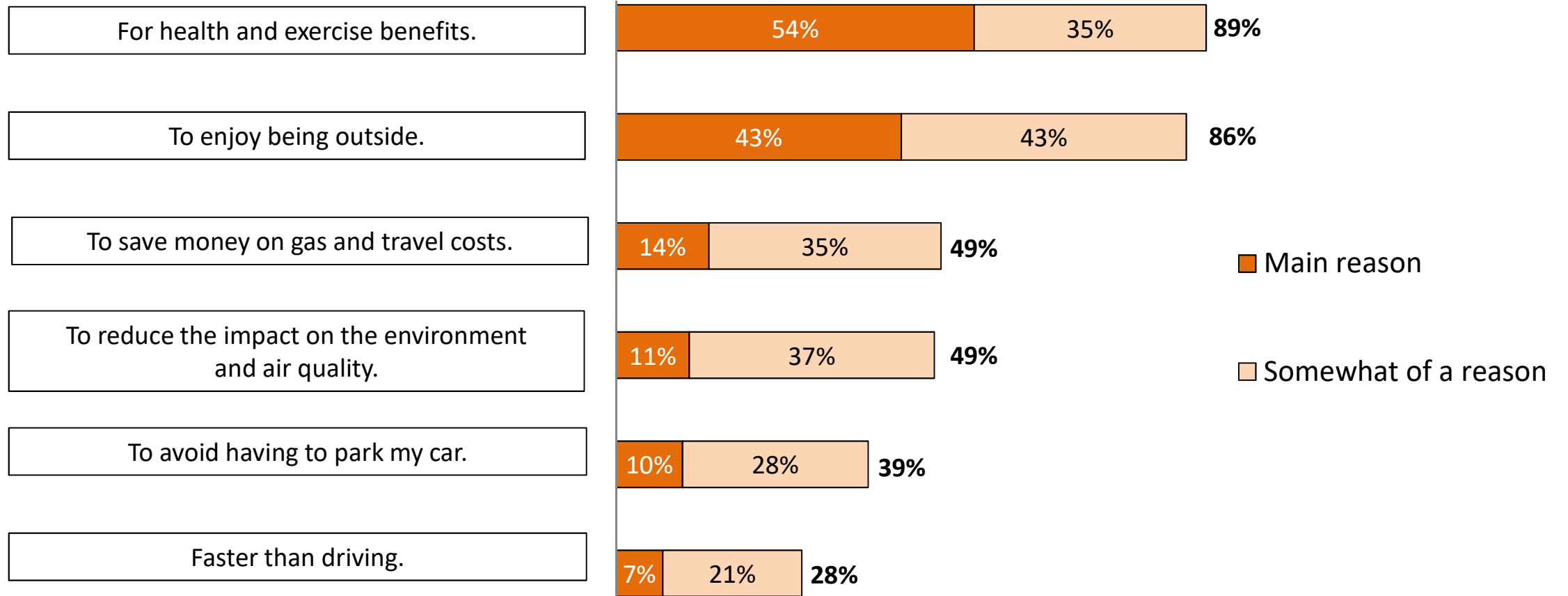
Millennials More Likely to Walk for Reasons Other than Exercise: To Run Errands, Go to Public Transit, or Get to Work or School



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Health and Being Outside are Main Reasons For Walking

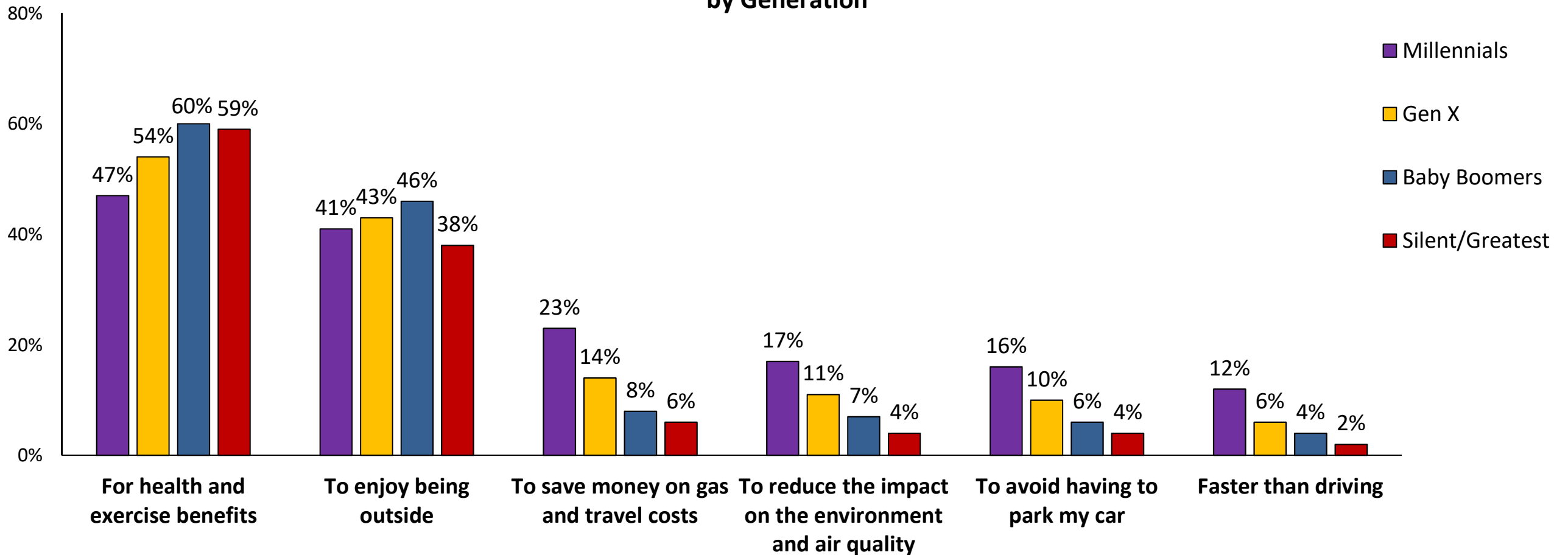
Reason that You Walk



Thinking about why you choose to walk, please tell me if each of the following is a reason that you walk.

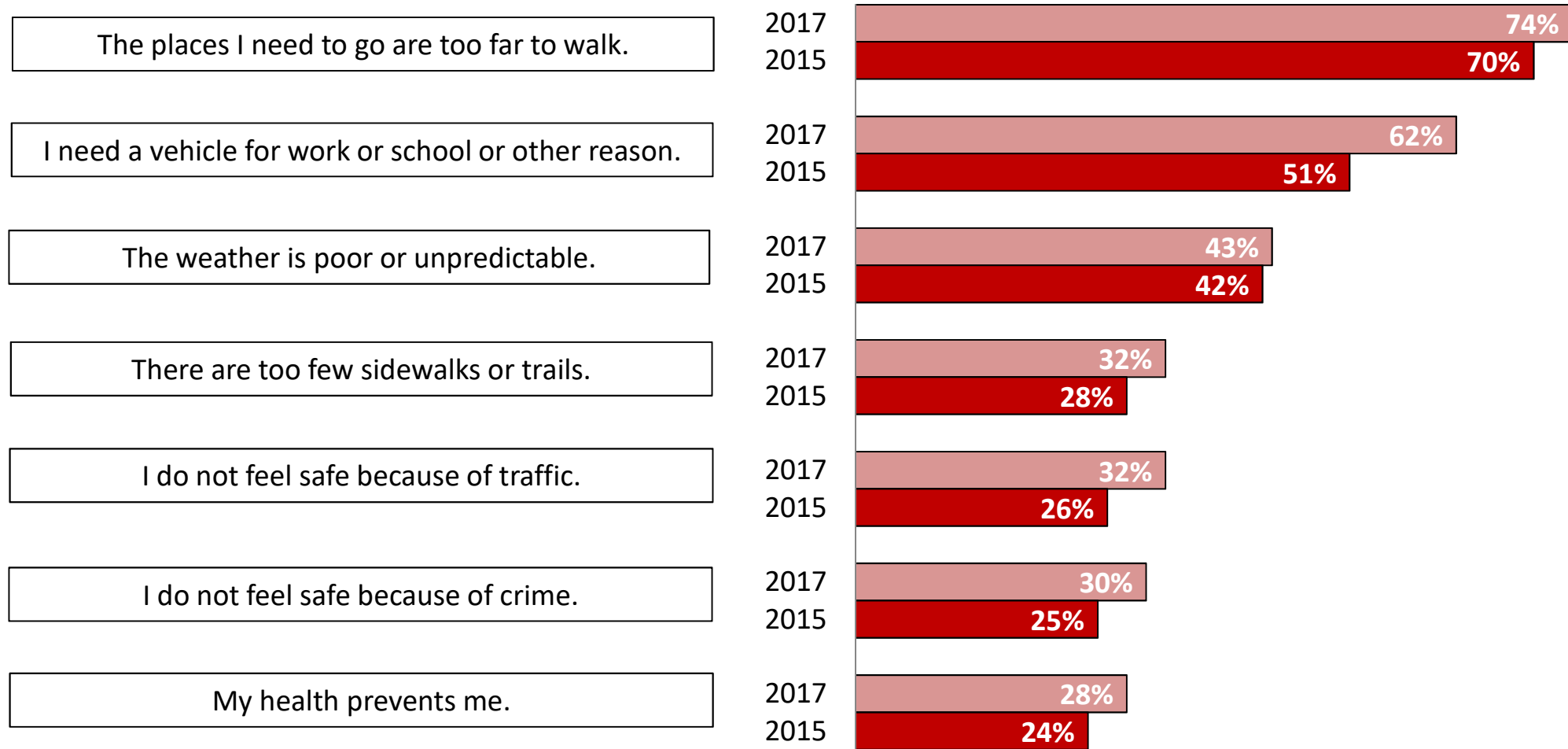
Health and Being Outside Primary Motivation for Walking across Ages, But Younger Generations More Diverse in their Reasons to Walk

% Main Reason That You Walk by Generation



Distance, Need for Vehicle Primary Reasons for Not Walking More

Things That Keep You From Doing More Walking

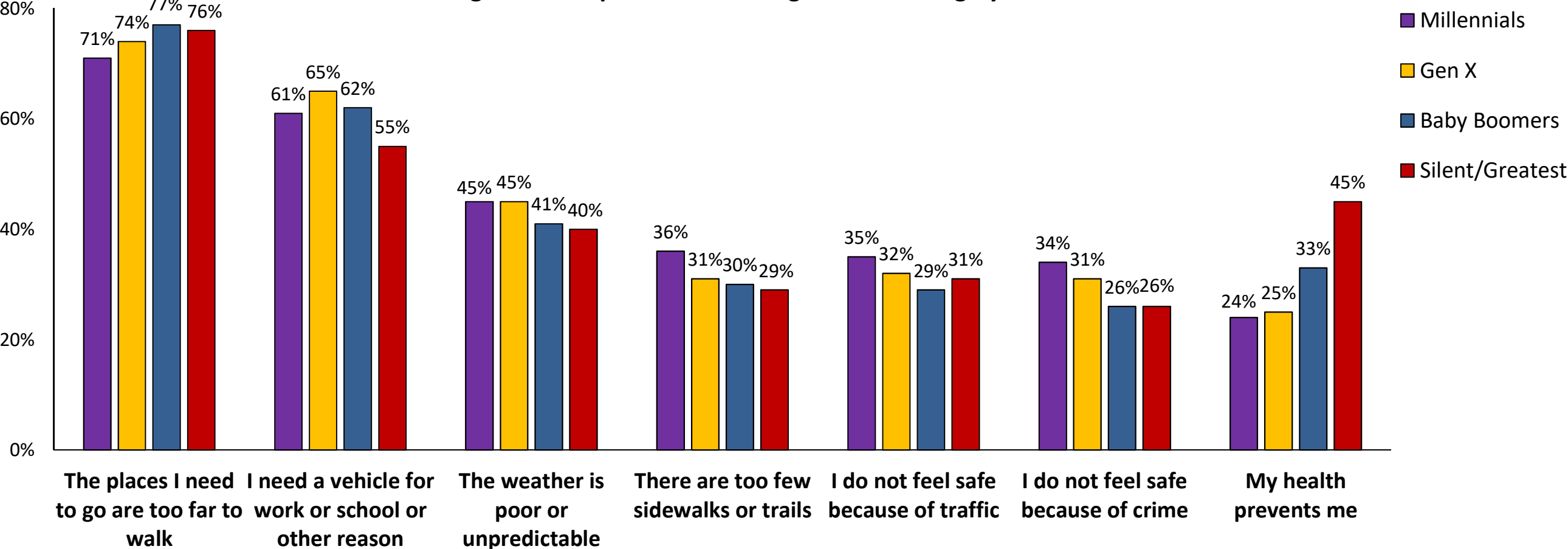


Now think about things that may keep you from doing more walking. Please indicate if each of the following keeps you from doing more walking.

Millennials Nearly As Likely to Say Places They Need to Go Are Too Far to Walk

*Younger generation also slightly more likely to feel unsafe due to traffic, crime, and lack of sidewalks;
Older generations' walking ability limited by poor health*

Things That Keep You From Doing More Walking by Generation



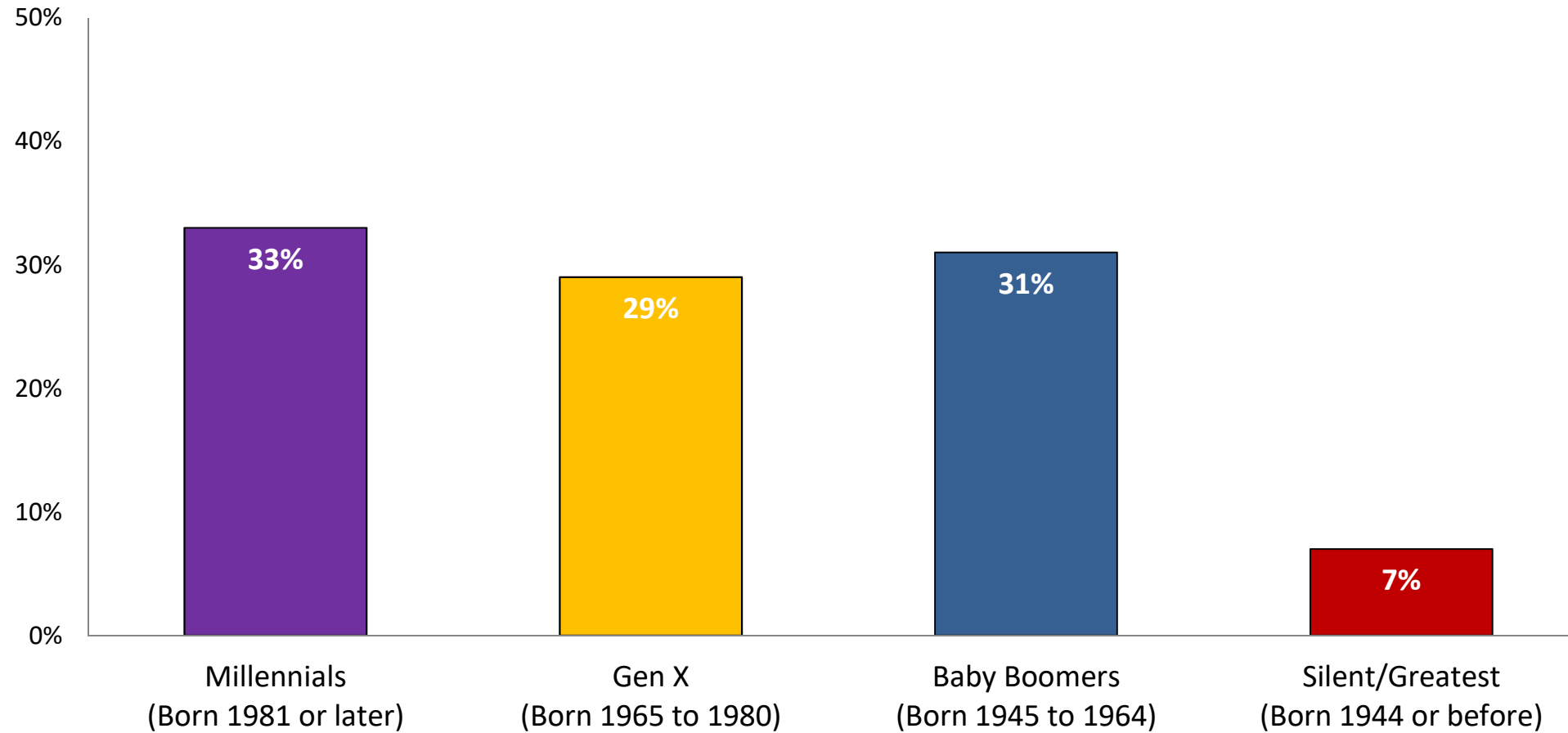
Demographics

Our Sample vs. ACS (Census) Data

The survey sample is similar to the population.

	50 largest MSAs	Survey sample	
HH Income (2013 3yr ACS)	Less Than \$15,000	12%	12%
	\$15,000 to less than \$50,000	32%	30%
	\$50,000 to less than \$75,000	18%	16%
	\$75,000 to less than \$100,000	12%	11%
	\$100,000 to less than \$150,000	14%	10%
	\$150,000 or more	13%	5%
Gender (2013 ACS 5yr)	Male	49%	48%
	Female	51%	52%
Age (2013 ACS 5yr)	18 to 24 years	13%	12%
	25 to 34 years	19%	17%
	35 to 44 years	18%	18%
	45 to 54 years	19%	19%
	55 to 64 years	15%	18%
	65 to 74 years	9%	12%
	75 or older	7%	5%
Education - 25 years and over (2013 ACS 5yr)	Did not complete high school	14%	8%
	High school graduate (or equivalent)	25%	31%
	Some college or Associates	28%	31%
	Bachelor's degree	21%	19%
	Graduate or professional degree	13%	11%

Distribution of Sample by Generation



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Survey Methodology

Survey Methodology

American Strategies designed this **Internet survey** of the **top 50 metropolitan statistical areas** in the United States. The survey reached 3,000 adults, 18 years or older. The survey was conducted by YouGov **on September 5-20, 2017**.

YouGov **interviewed 3210 respondents** who were **then matched down to a sample of 3000** to produce the final dataset. The respondents were matched to a sampling frame of the top 50 MSAs on gender, age, race, education, ideology, and political interest. **The matched cases were weighted to the sampling frame using propensity scores**. The matched cases and the frame were combined and a logistic regression was estimated for inclusion in the frame. The propensity score function included age, gender, race/ethnicity, years of education, ideology, region, and voter registration status. The propensity scores were grouped into deciles of the estimated propensity score in the frame and post-stratified according to these deciles.

The sampling frame used for matching and weighting was constructed by stratified sampling from the full 2010 American Community Survey (ACS) sample with selection within strata by weighted sampling with replacements (using the person weights on the public use file). Data on voter registration status and turnout were matched to this frame using the November 2010 Current Population Survey. Data on interest in politics and party identification were then matched to this frame from the 2007 Pew Religious Life Survey.

YouGov operates an online panel of over 4 million panelists across 37 countries. These represent all ages, socio-economic groups and other demographic types which allows them to create nationally representative online samples and access hard to reach groups, both consumer and professional. Their US panel has 1.8 million respondents.