

National Community and Transportation Preferences Survey

April 2023

Executive Summary - Overview

Results from the 2023 Community and Transportation Preferences Survey generally continue the trends from previous surveys. Residents in the top fifty metropolitan areas remain split on what they look for in a neighborhood. One noticeable difference is a modest uptick in measures of importance of walkability.

In general, people in the largest 50 MSA's are satisfied with the quality of life in their communities – as they have been in each of our previous surveys. If they were deciding where to live today, they would place high importance on low levels of crime, sidewalks and walkability, as well as short commutes and easy access to the highway.

In terms of priorities for their state and local governments, about three-quarters of residents place the highest priority on maintaining and repairing roads, highways, freeways and bridges. A number of other issues are in the second tier, with half placing a high priority on building more roads, expanding public transportation, providing alternatives to driving, and developing more walkable communities.

Most Americans continue to agree that they like to walk and drive, while almost half agree that they like to ride a bike and in an uptick from previous years, 44 percent like to take transit. The things that keep people from doing more walking are places being too far away to walk and the need for a vehicle for work or school.

Executive Summary – Where We Live and Satisfaction

Little has changed over the past five years about where people live. Half of residents in the top fifty metropolitan areas live in the suburbs and another quarter in residential parts of the city; a majority live in detached homes, with sidewalks, parks, and public transit nearby. Just under two-thirds agree they live in at least somewhat walkable communities – similar to past years.

- Gen Z and Millennials, are more likely to agree that there are sidewalks on most streets and lots of places such as shops, cafes and restaurants to walk to. A majority across generations also agree their communities are walkable.
- Living in a walkable community is correlated with higher quality of life, with half of those who live in a highly walkable community saying they are *very* satisfied with their quality of life.

A majority of residents are living in a single-family detached house. But there are important regional splits

- People in NYC and LA are more likely to live in a townhouse or rowhouse, apartment, or other non-single-family form of housing. Outside of these major cities, a majority live in single-family detached homes.

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). **Sidewalks and being within walking distance to shops and restaurants, a short commute, and proximity to highways and public transit are top priorities;** the numbers from this year are in line with past results.

- People under age 50 are much more likely to prioritize a short commute to work, with nearly half of Millennials describing it as *very* important in deciding where to live. The importance of walkability is also strongly correlated with generation, with half of Millennials seeing it as *very* important. Gen Z and Millennials also prioritize proximity to public transit more highly than closeness to the highway.
- Urban residents are much more likely to say proximity to things is very important. Walkable communities, short commutes, proximity to public transit are all very important to a plurality of city dwellers. Suburban and rural residents are similar to each other in assigning lower importance to public transit, commute distance, and walkable distance to community places. Suburban residents are more like urbanites when it comes to having sidewalks, with half saying it is very important.
- About six-in-ten residents would spend at least a little more for a house in a walkable community – similar to results in previous polls. There is a direct correlation between generation and the willingness to spend more for walkability. Among those who say walkability is important, roughly 90 percent of Gen Z and Millennials say they would pay more for a walkable community, with one-third saying they would pay a lot more.

Executive Summary – Ideal Community

Americans lean toward more walkable communities when compared to different options that require more driving. A larger majority – compared to other years – prefer a walkable community with a smaller yard, but just under half prefer a larger yard and more driving. In an uptick from previous years, 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 56 percent overall preferring the more walkable community. Gen Xers, however, especially those with kids at home, lean towards the larger home and more driving. Millennials with kids at home, however, lean towards the walkable community, when the only trade-off is a smaller yard.
- **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 split evenly in their preference. However, generation plays an important role in separating residents. Gen Zers and Millennials are more likely to prefer an apartment or townhouse with walkability and a short commute. Gen Xers and Boomers are more likely to lean toward a detached single-family home
- **When asked to rank the importance of home/neighborhood qualities, low levels of crime is most important to residents.** Walkability and a large home make up the second tier. City dwellers drive the walkability numbers, and rural residents are much more likely to value a large yard. Suburbanites are most likely to cite low levels of crime, despite a majority of city and rural residents ranking it in the top two.

Executive Summary – Transportation

People’s feelings about daily travel over the past five years remain fairly consistent. Most residents say they like walking as well as driving (over 70 percent), but a majority say that they drive because they do not have other options.

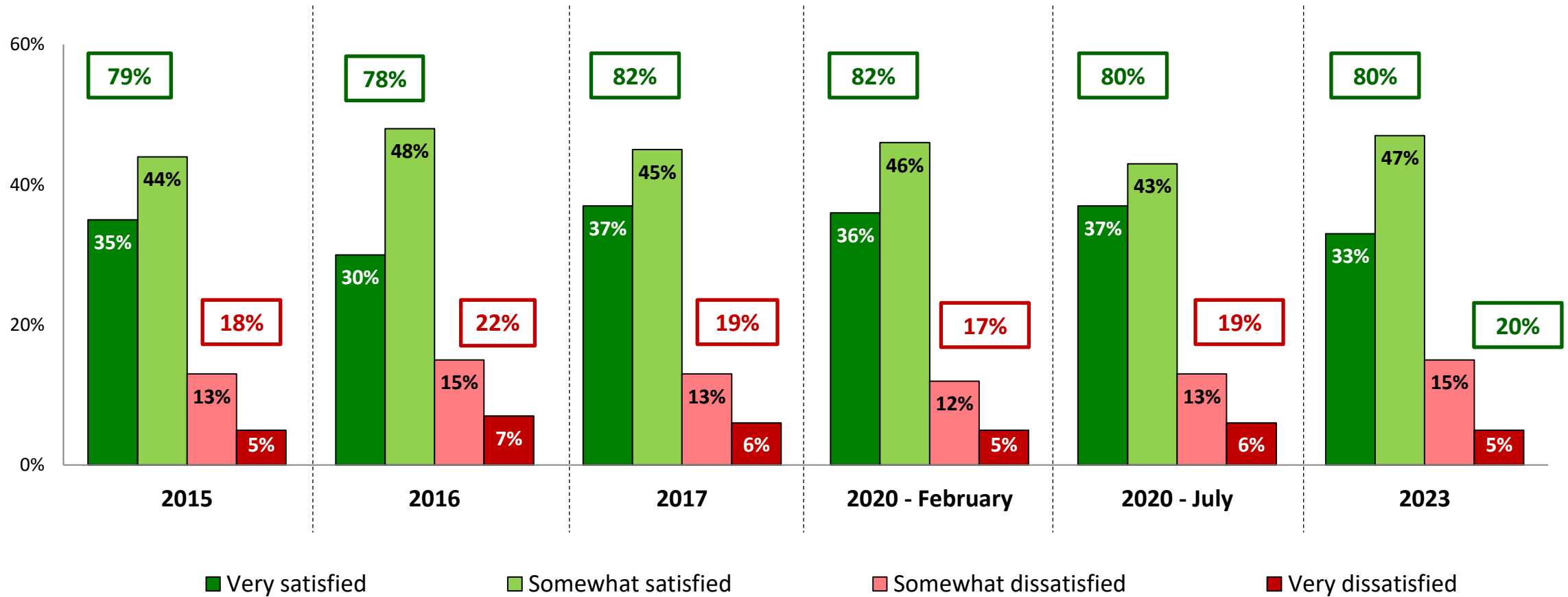
- Maintaining roads, bridges, and highways continues to be residents’ overwhelming priority for the government. Desire to expand alternatives to driving – more public transit, ways to walk and bike, building more walkable communities – saw a moderate bump, with just about half seeing those actions as a high priority. Road maintenance is most important to all generations. Gen Z and Millennials prioritize expanding transportation alternatives and building more walkable communities.
- Consistent with previous years, 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. Liberals and college-educated residents are more open to replacing the lost revenue from the gas tax.
- Most residents like walking (79 percent) and driving (70 percent), while about half say they like riding a bike, and slightly fewer (44 percent) say they like taking public transit like trains and buses – an uptick from previous years. Age is a key consideration in these preferences. Younger generations are more likely to like biking and taking public transit, while older generations are more likely to say they like driving.
- Around six-in-ten residents say that they drive because they have no other options – similar to the past four years. Older residents are more likely to walk less because of traffic and safety concerns or because their health prevents them.

Current Living Environment

Overall Satisfaction With Quality of Life Remains Steady

Satisfaction levels mostly unchanged over the past six years

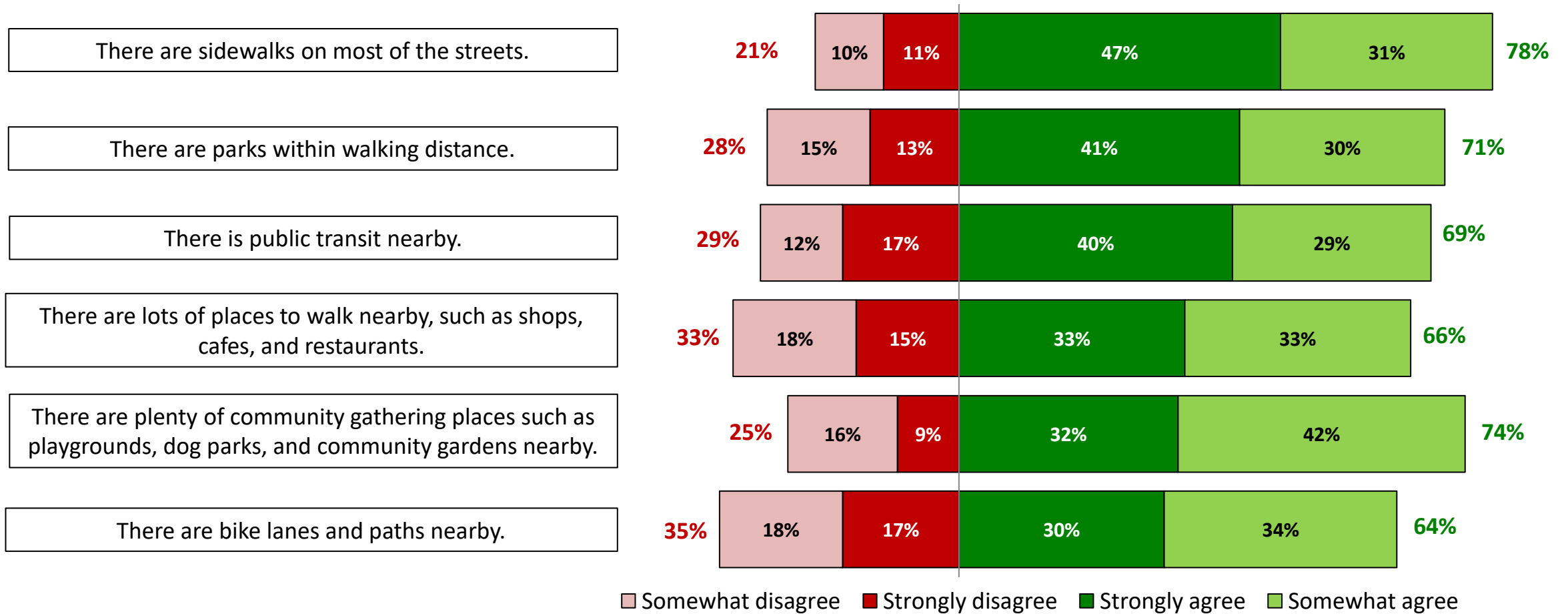
Quality of Life In Your Community



Q.2 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 Agree That There Are Sidewalks or Places to Walk to, Like Parks or Shops, Near Where They Live

Descriptors of the Area Where You Currently Live



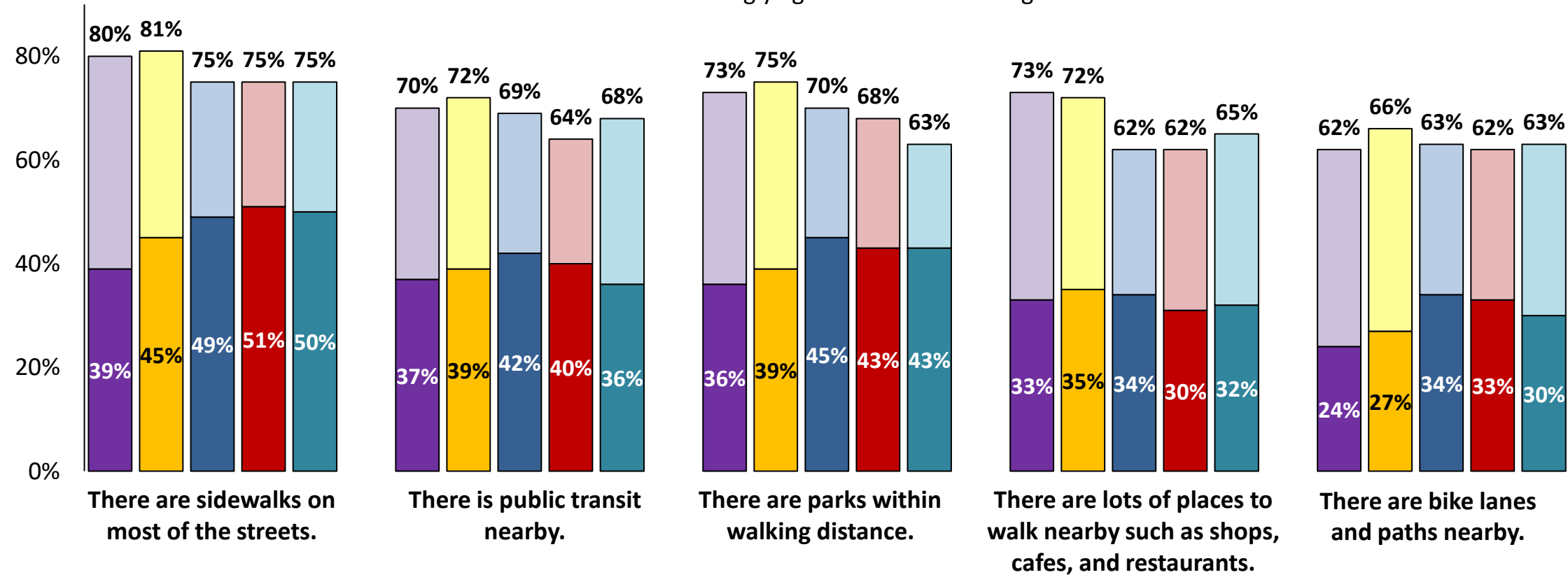
Q.3 Here are a few questions about your neighborhood and home. For each, please indicate whether you (ROTATE) agree or disagree with that statement.

Access to Sidewalks, Transit and Bike Lanes Similar Across Generations but Younger Generations More Likely to be Closer to Parks, Shops and Cafes

Descriptors of the Area Where You Currently Live by Generation

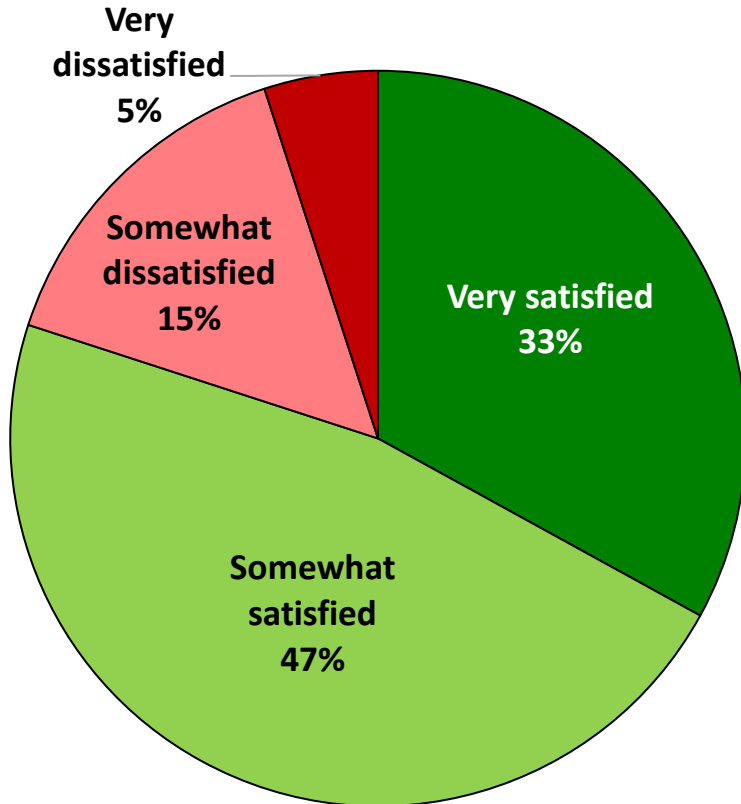
Strongly agree Somewhat agree

- Gen Z
- Millennials
- Gen X
- Baby Boomers
- Silent/Greatest

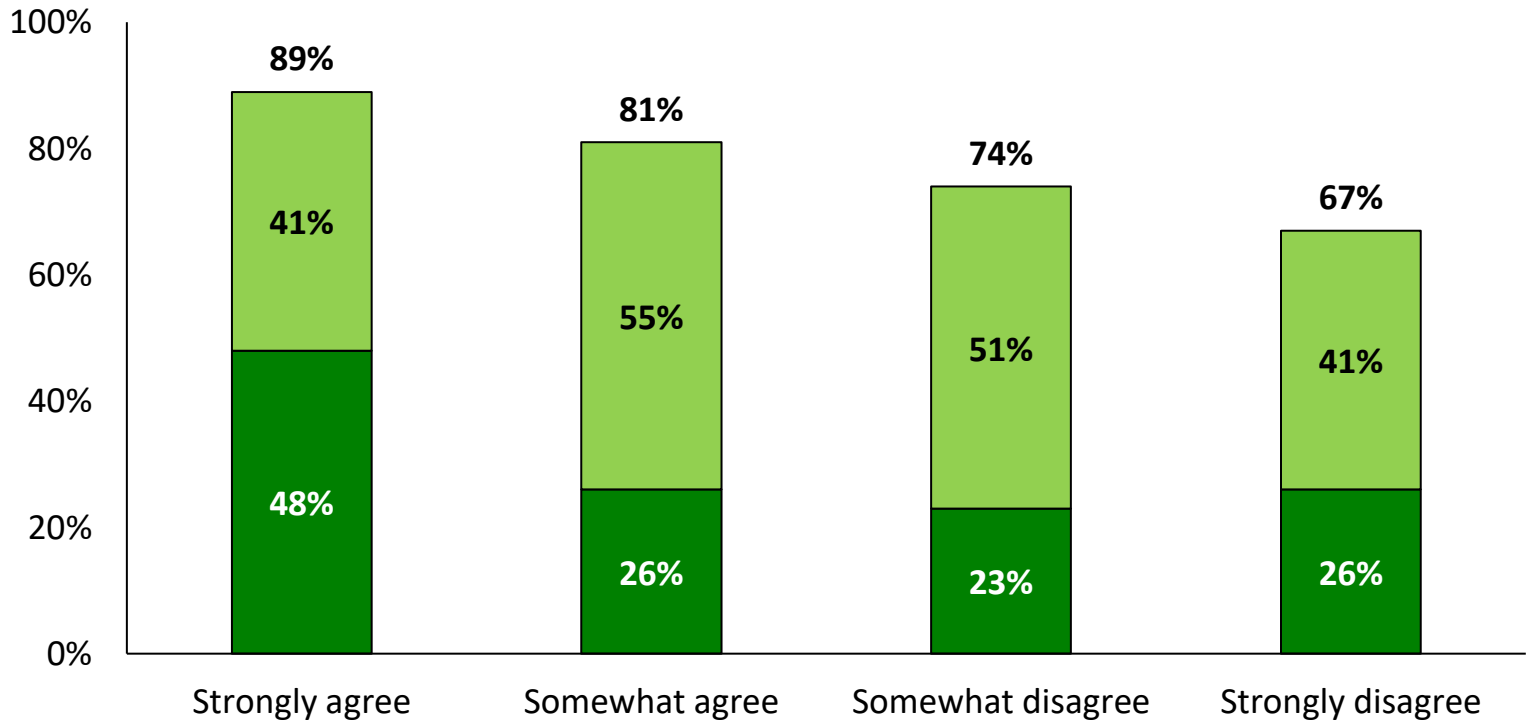


People in Walkable Communities Are More Likely to be Very Satisfied with their Quality of Life

Quality of Life In Your Community



Quality of Life by Agreement that Neighborhood is Walkable



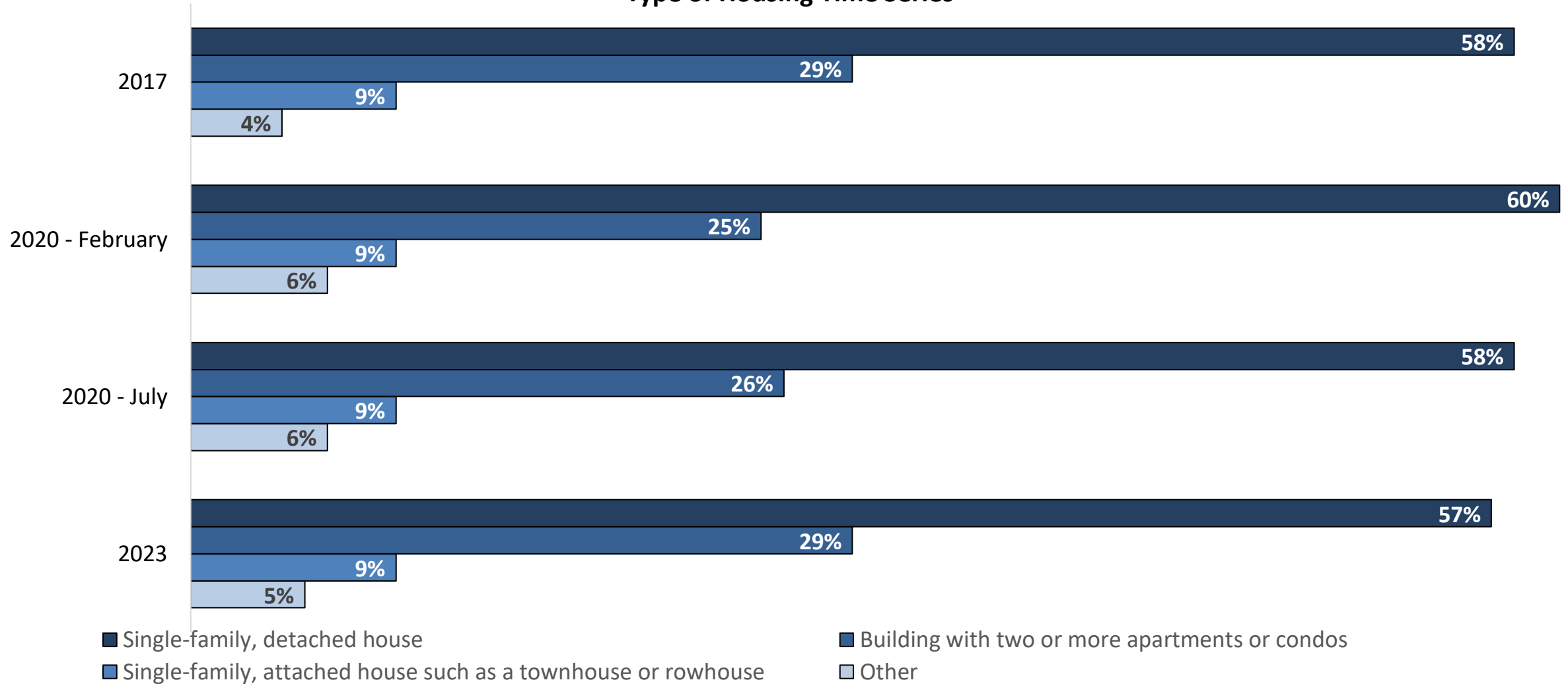
There are lots of places to walk nearby such as shops, cafes, and restaurants.

■ Very satisfied ■ Somewhat satisfied

Q.2 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?

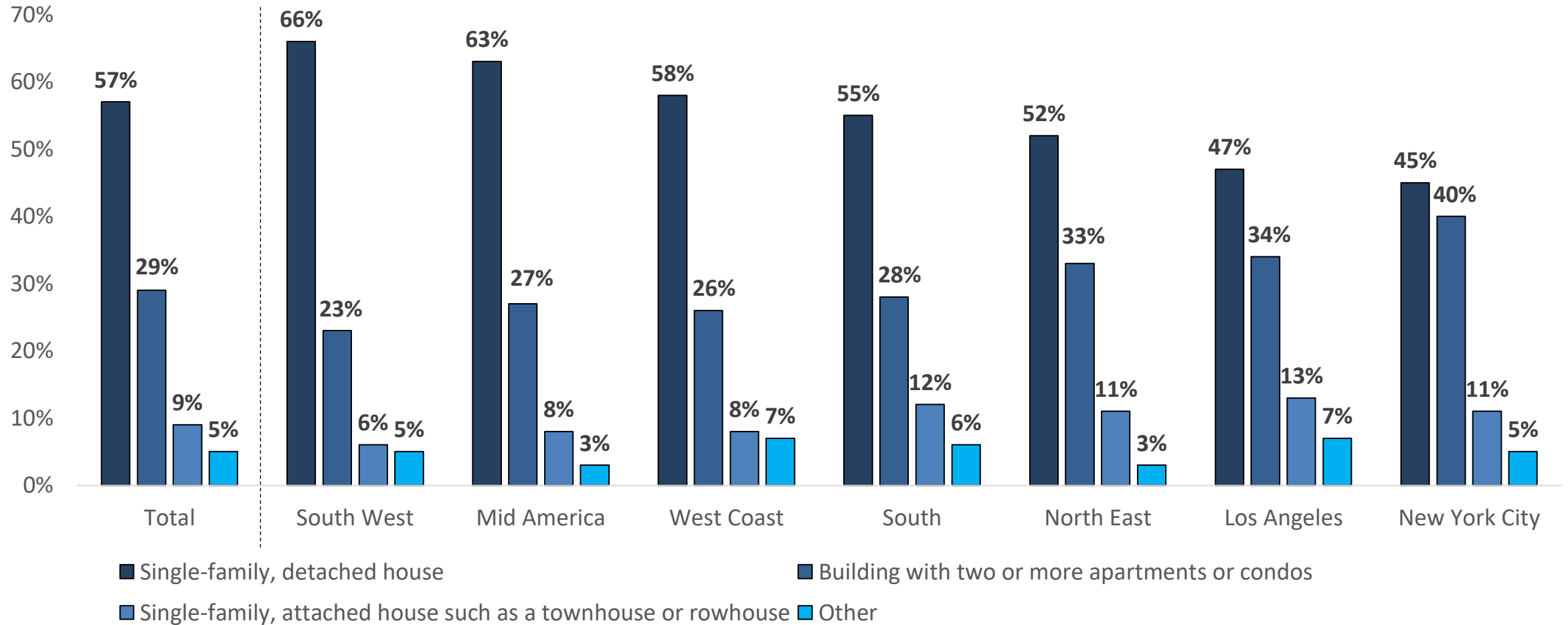
Single-Family, Detached House is Still Most Common Form of Housing

Type of Housing Time Series



In NYC And LA Denser Forms of Housing Are Just as Common as Single-Family, Detached Houses

Type of Housing by Region



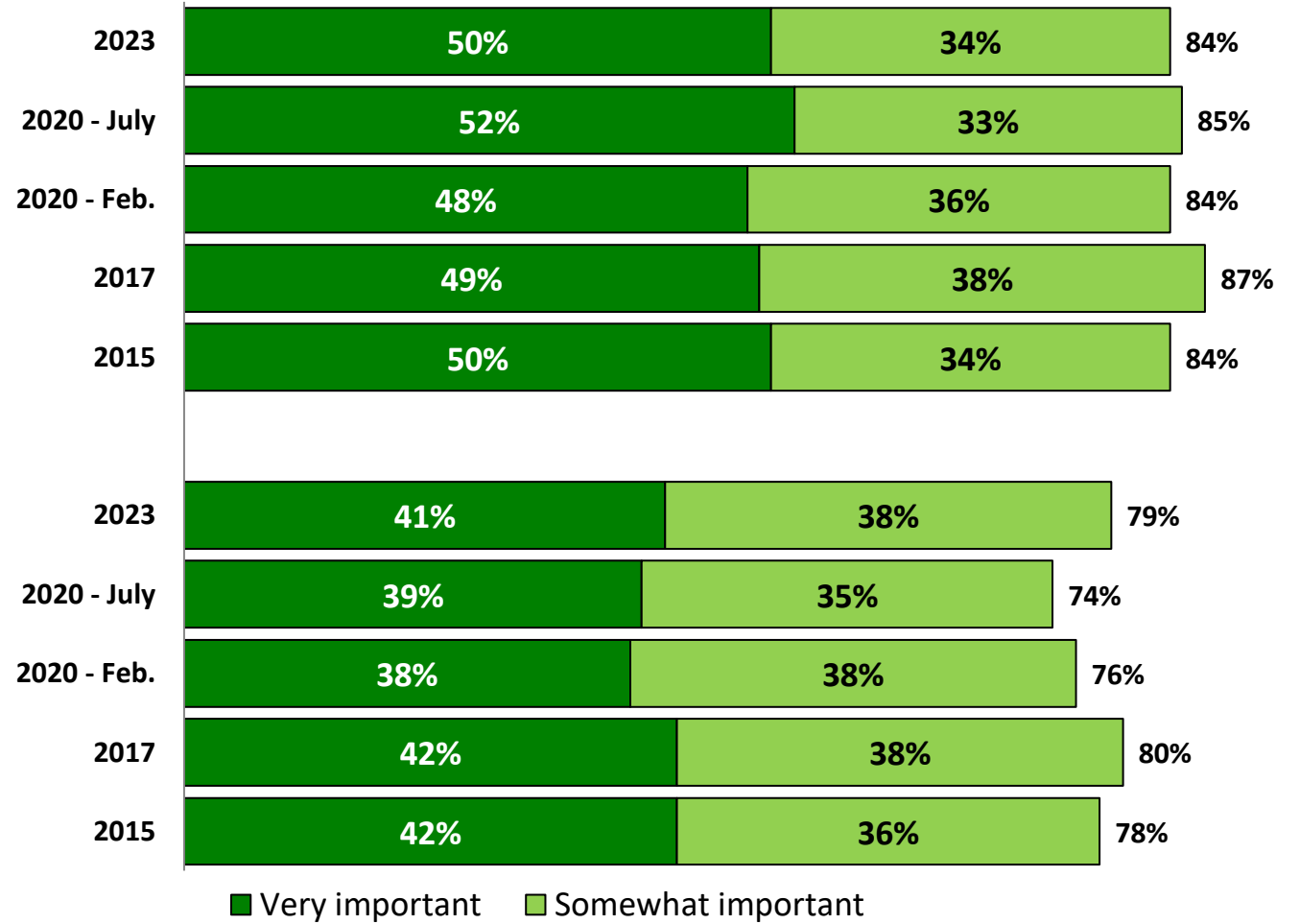
What's Important in Deciding Where to Live

Sidewalks, Proximity to Shops and Parks Continue to be Most Important Attributes When Deciding Where to Live

Most Important Factors in Deciding Where to Live: 1st Tier

Sidewalks and places to take walks.

Being within an easy walk of other places and things in a community, such as shops and parks.



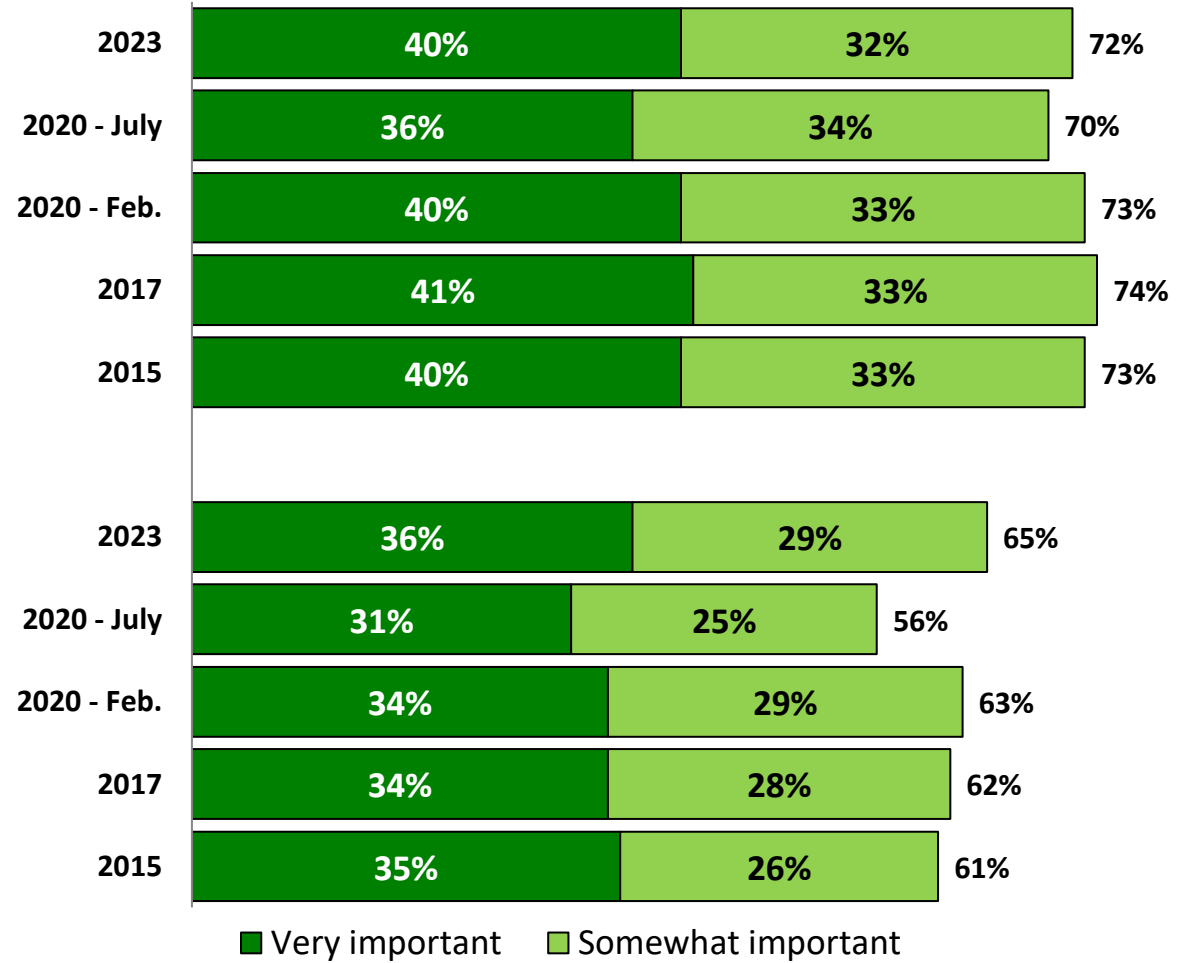
Q.5 If you were deciding today where to live, please indicate how important each of the following would be to you:

Short Commute and Public Transit Lead Second Most Important Attributes When Deciding Where to Live

Most Important Factors in Deciding Where to Live: 2nd Tier

Being within a short commute to work.

Having public transit nearby.



Q.5 If you were deciding today where to live, please indicate how important each of the following would be to you:

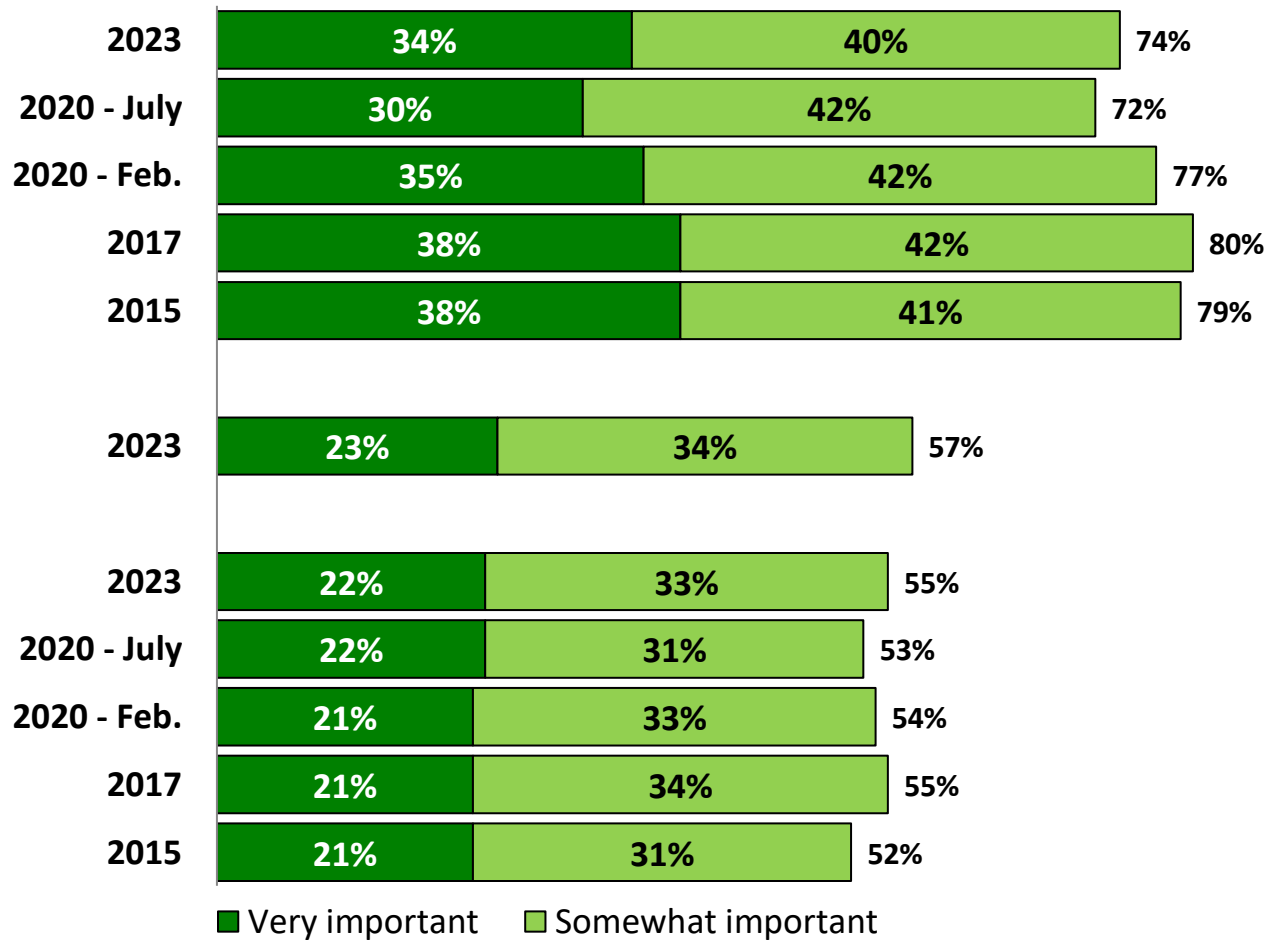
Highway Access and Bike Paths Form 3rd Tier of Attributes When Deciding Where to Live

Most Important Factors in Deciding Where to Live: 3rd Tier

Easy access to the highway.

Separated bike paths or trails. (SPLIT SAMPLE B)

Bike lanes and paths nearby. (SPLIT SAMPLE A)

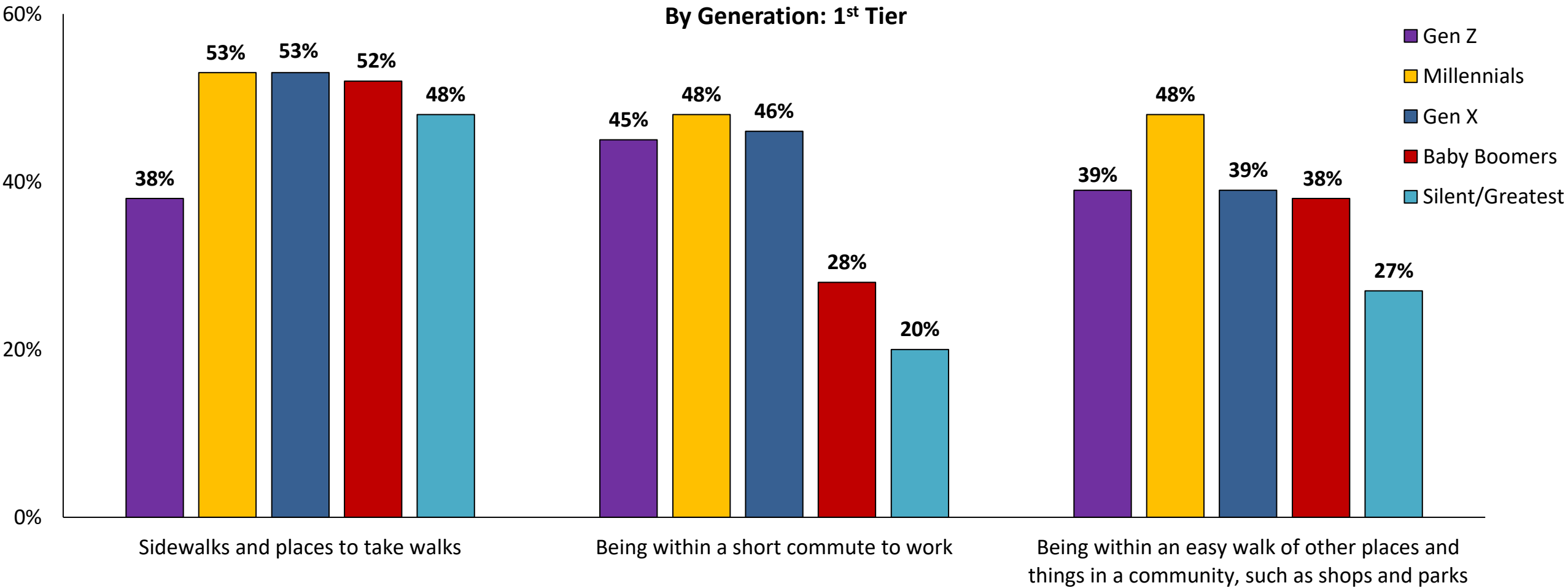


Q.5 If you were deciding today where to live, please indicate how important each of the following would be to you:

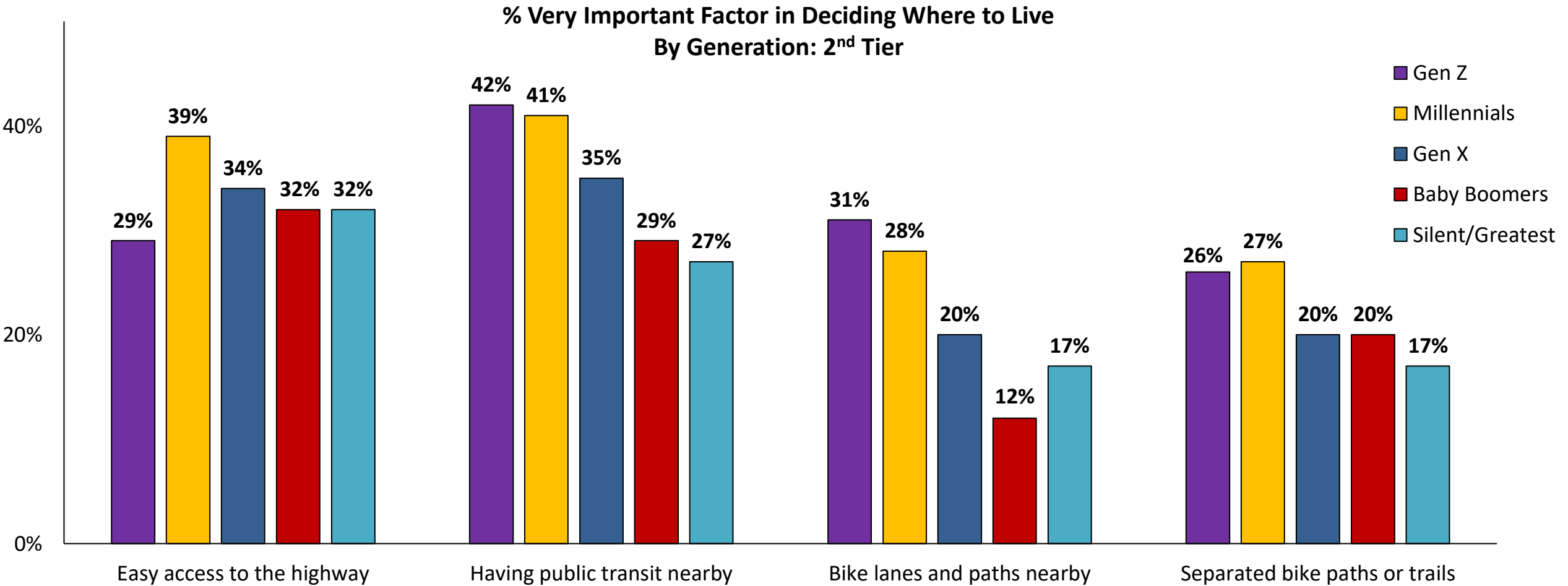
Generational Variance on Walkability and Commute Times

Sidewalks important to all; Commute times less important to older generations

**% Very Important Factor in Deciding Where to Live
By Generation: 1st Tier**



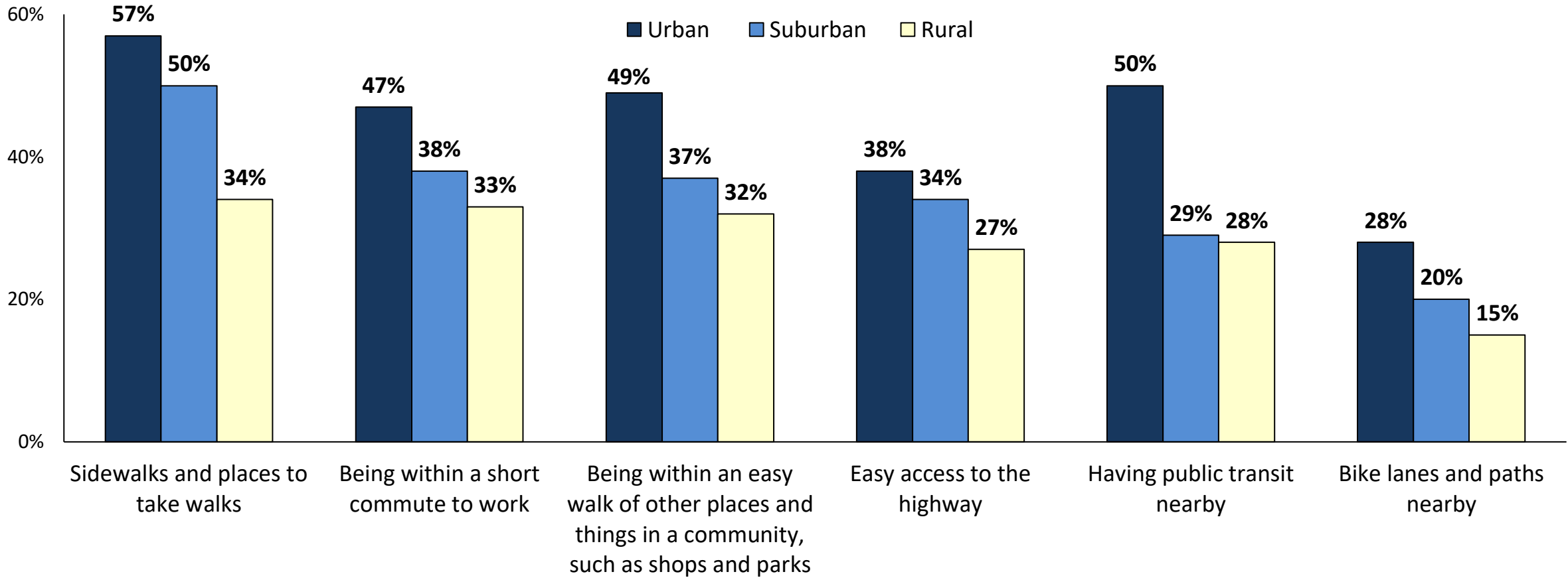
Clear Separation Between Gen Z and Millennials And Older Generations Regarding Public Transit and Bike Lanes



Q.5 If you were deciding today where to live, please indicate how important each of the following would be to you:

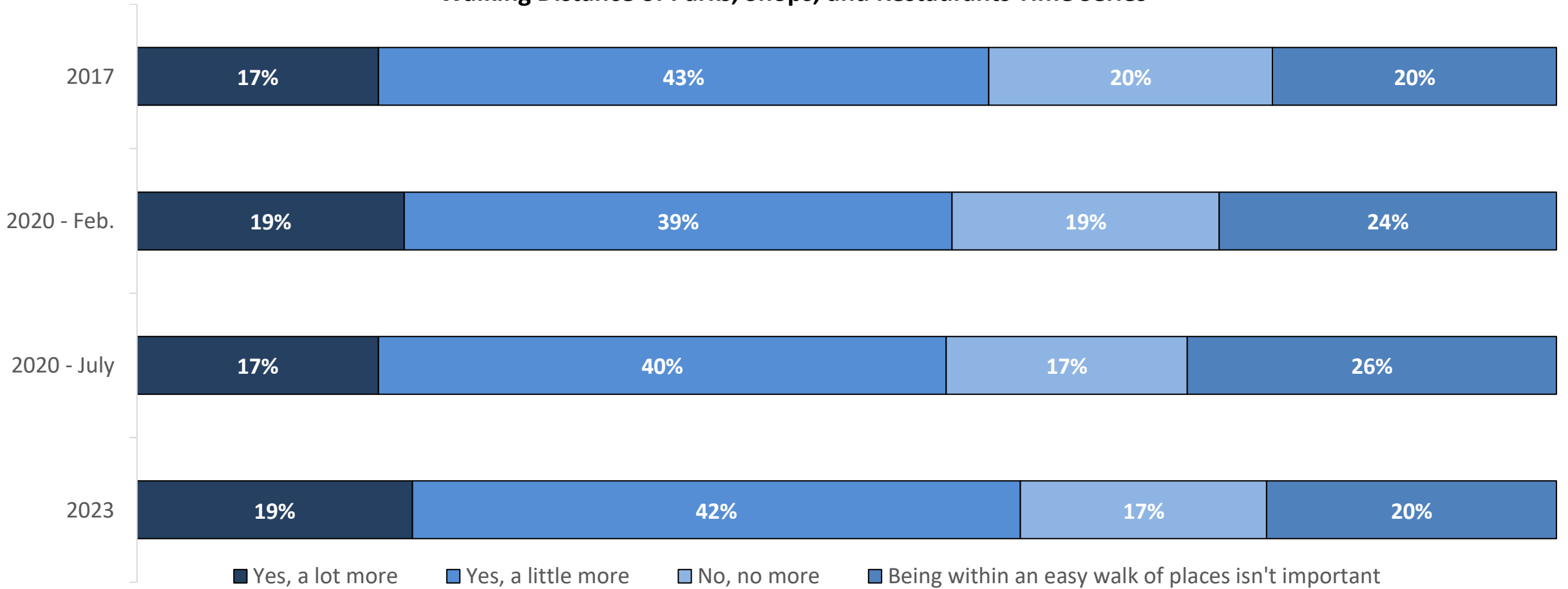
Residents of Cities Separate Themselves From Suburban and Rural Communities

% Very Important Factor in Deciding Where to Live By Homeownership



Small Uptick in Percentage Who Would Pay More To Live in a Walkable Community

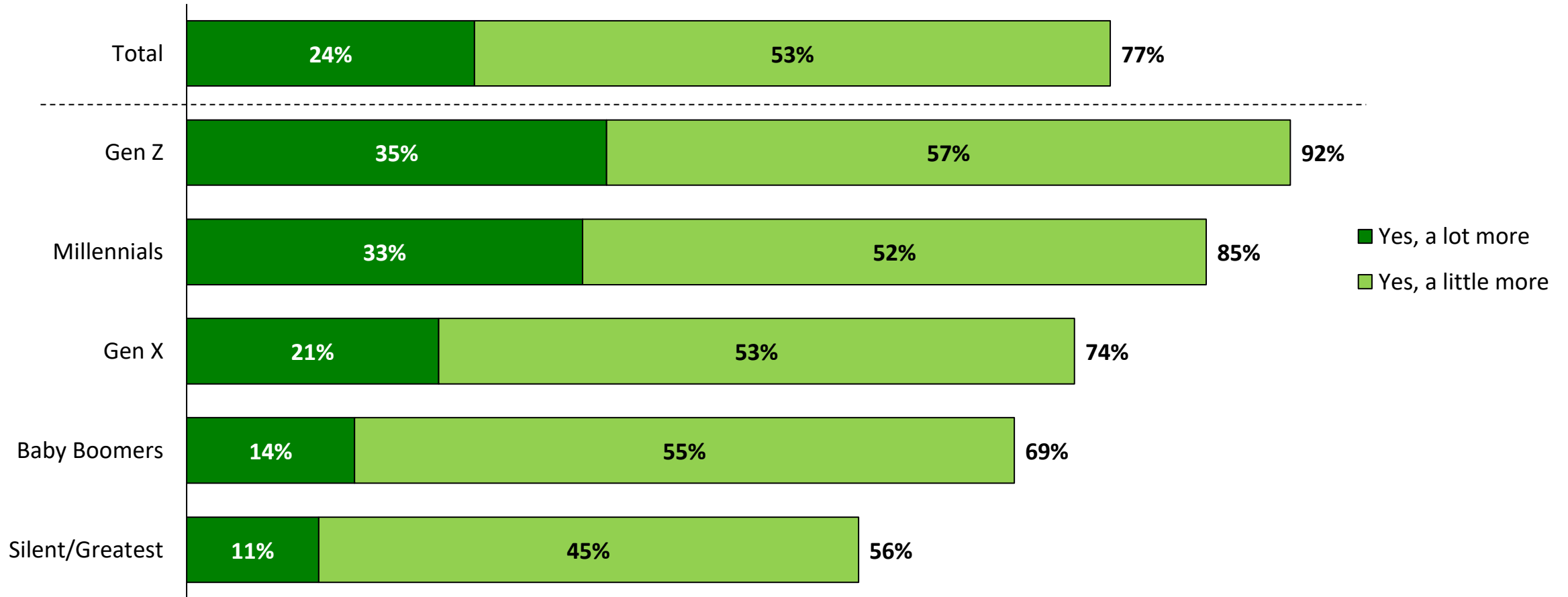
Willingness to Spend More to Live Within Walking Distance of Parks, Shops, and Restaurants Time Series



Q.6 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?

Gen Z and Millennials Most Likely to Say They Will Pay More for Walkable Communities

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

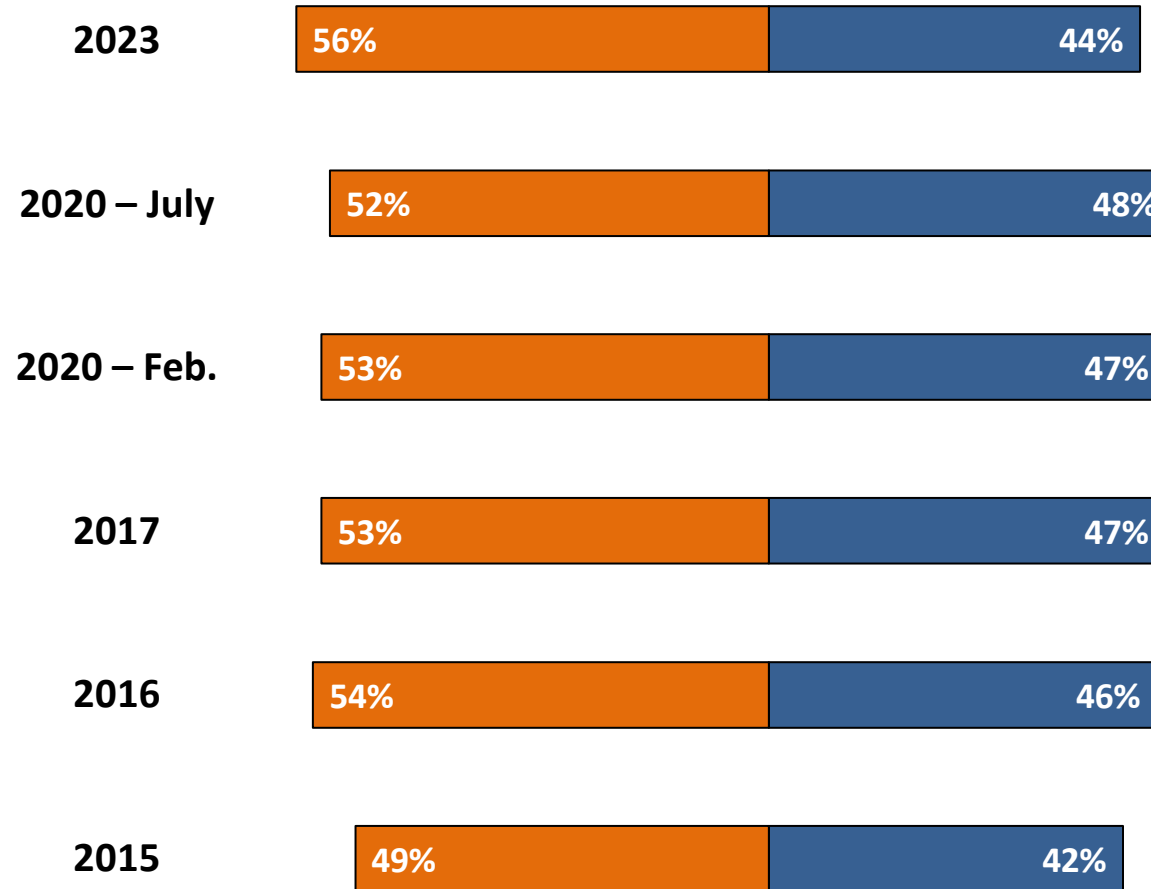


Q.6 If you were moving to a new home, would you be willing to spend more to live in a community where you could easily walk to parks, shops, and restaurants?

*Mixed Use Community v.
Conventional Suburban Community*

Majority Prefer Houses With Small Yards and More Walkability Over Homes With Large Yards and More Driving

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.

Q.7 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.

Ideology, Urbanicity, and Homeownership Status

Drive Preference for Walkable Community

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: 56%

Liberal (67%)
City - Downtown (64%)
City – Residential area (64%)
Renters (64%)
Women 50+ (62%)
Single (61%)
New York City (61%)

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.

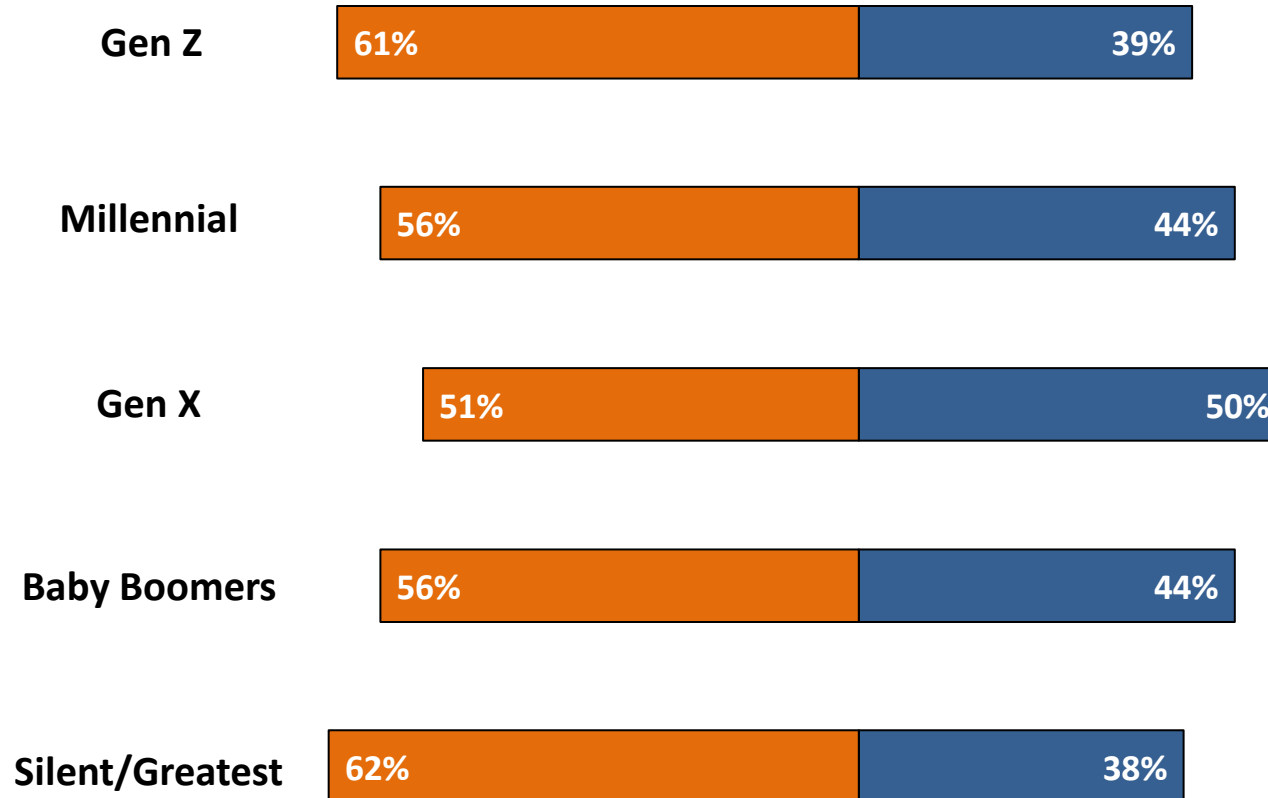
Total Prefer: 44%

Very conservative (62%)
Small town/Rural area (55%)
Gen X, kids in school (57%)
Suburban, residential (50%)
Homeowners (50%)
South (49%)
Age 35-49 (49%)
Southwest (48%)

Q.7 Please select the community where you would prefer to live:

Oldest and Youngest Generation Most Likely to Prefer Small Yards and Walkability

Preferred Community by Generation

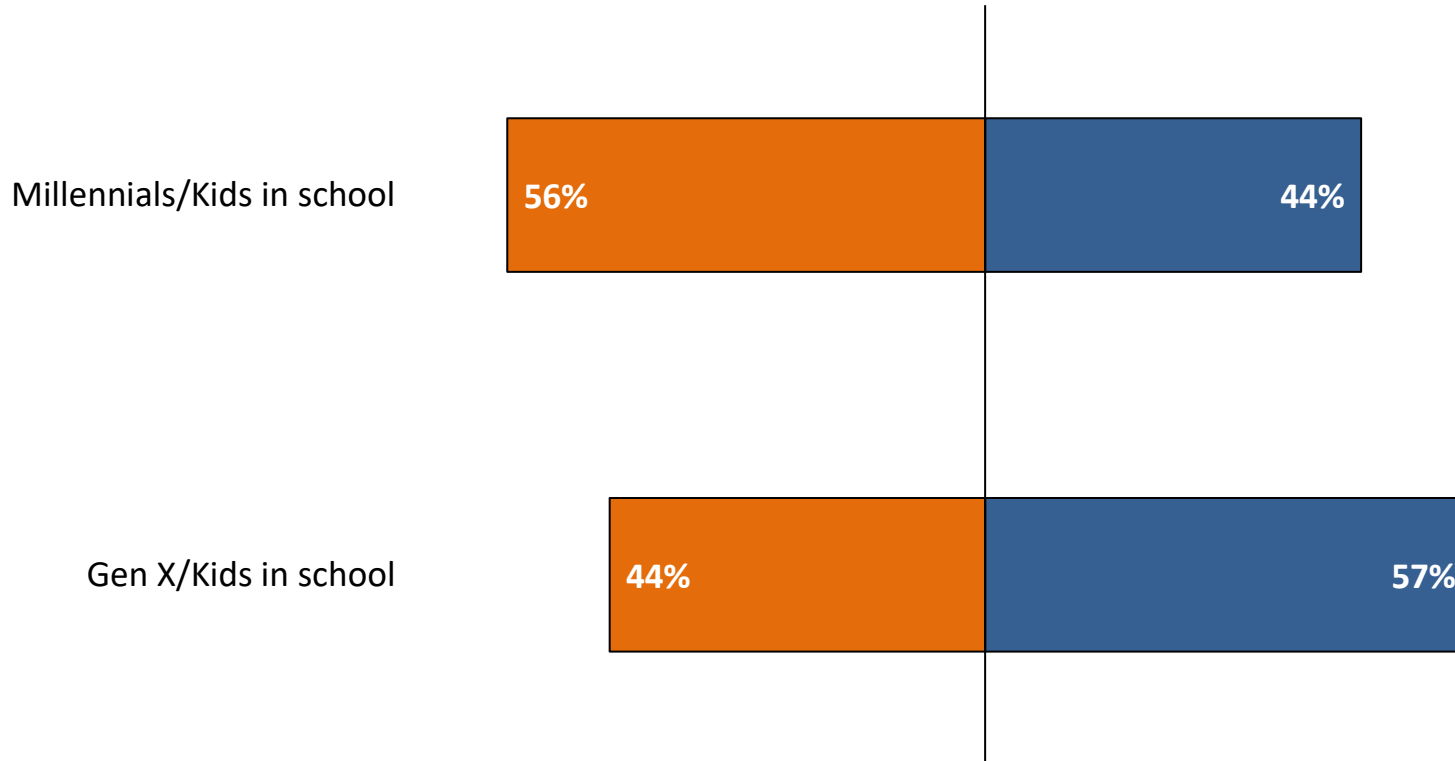


Houses with small yards and it is easy to walk to the places you need to go.

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

Millennials with Kids at Home Lean Towards a Walkable Community, While Gen Xers Prefer the Conventional Suburbs

Preferred Community by Kid Status/Generation

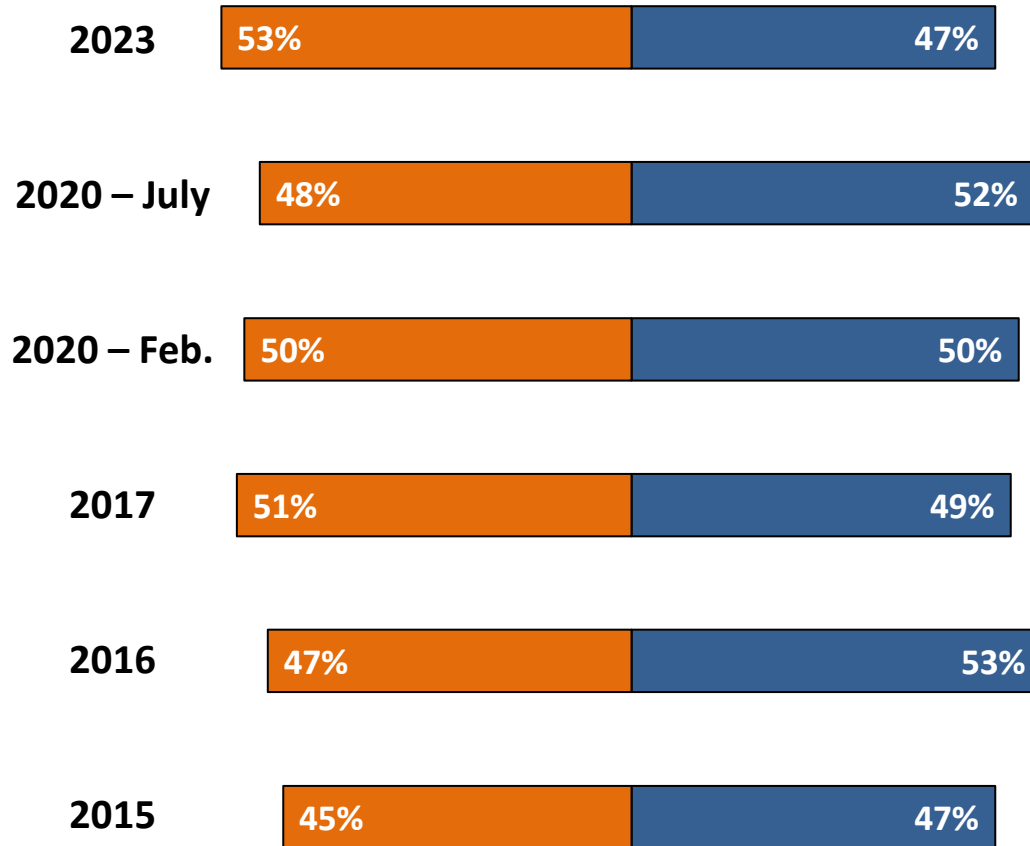


Houses with small yards and it is easy to walk to the places you need to go.

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

Compared to Previous Years, 2023 Shows Biggest Advantage for Denser More Walkable Communities

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.

Q.7 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.

Generation and Homeownership Status Drive Preference For Community Types

Rural and suburban residents, married, and those with kids in school lean towards 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: 53%

City - Downtown (71%)

Gen Z (69%)

Renters (68%)

Age 18-34 (66%)

City – Residential area (65%)

New York City (64%)

Single (63%)

Liberal (60%)

Living with friends or family (58%)

People of Color (58%)

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: 47%

Small town/Rural area (60%)

Conservative (64%)

Homeowners (59%)

Men 50+ (59%)

Married (57%)

Baby Boomers (54%)

Suburban (54%)

Kids in school (52%)

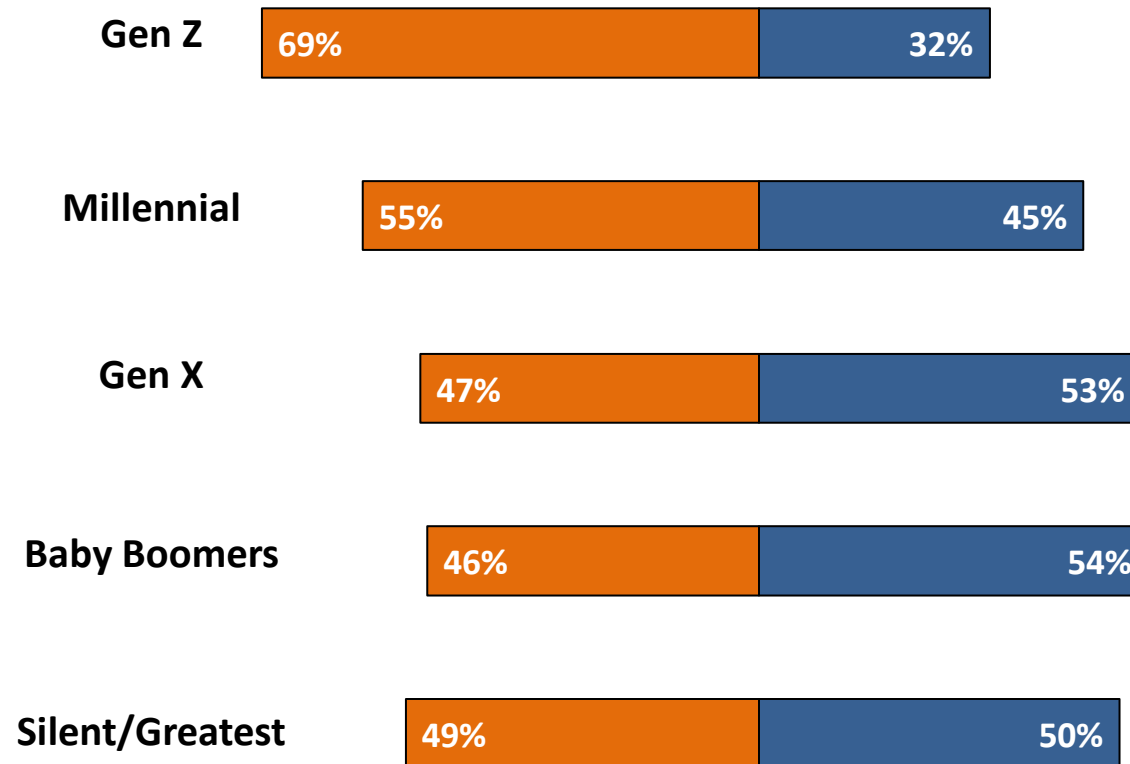
Q.7 Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. Please select the community that you prefer.

Gen Z Overwhelmingly Prefers Walkable Community and Short Commute

Other generations show more balanced split

Preferred Community by Generation

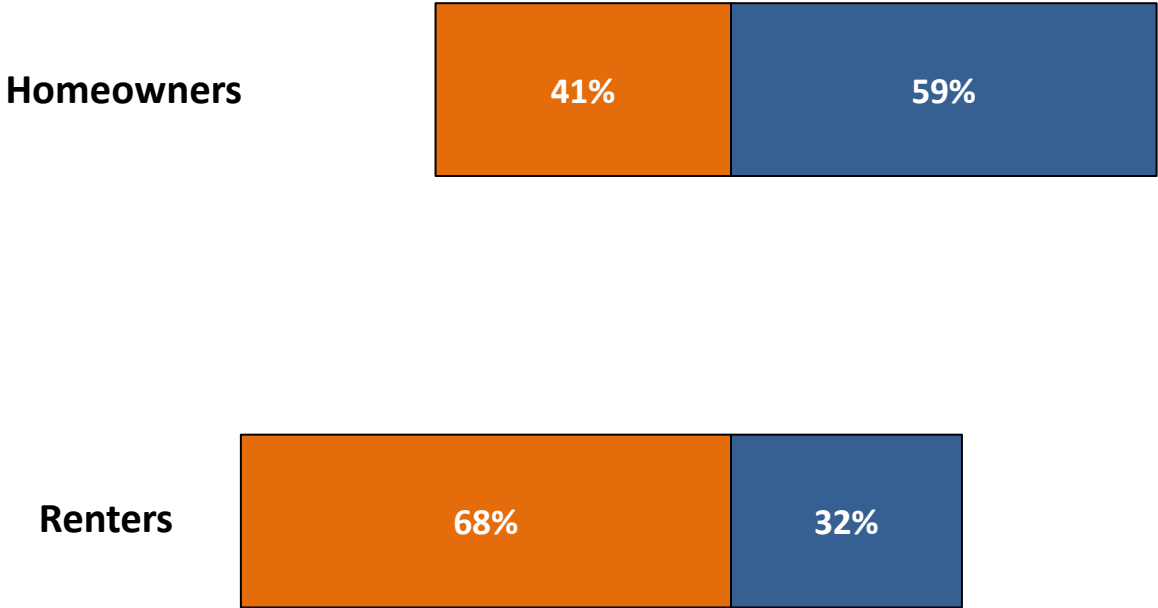
Own or rent an apartment or townhouse and you have an easy walk to shops and restaurants and have a shorter commute to work.



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

By a 2-to1 Margin Renters Prefer More Dense Housing In A Walkable Neighborhood

Preferred Community by Homeownership Status



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.

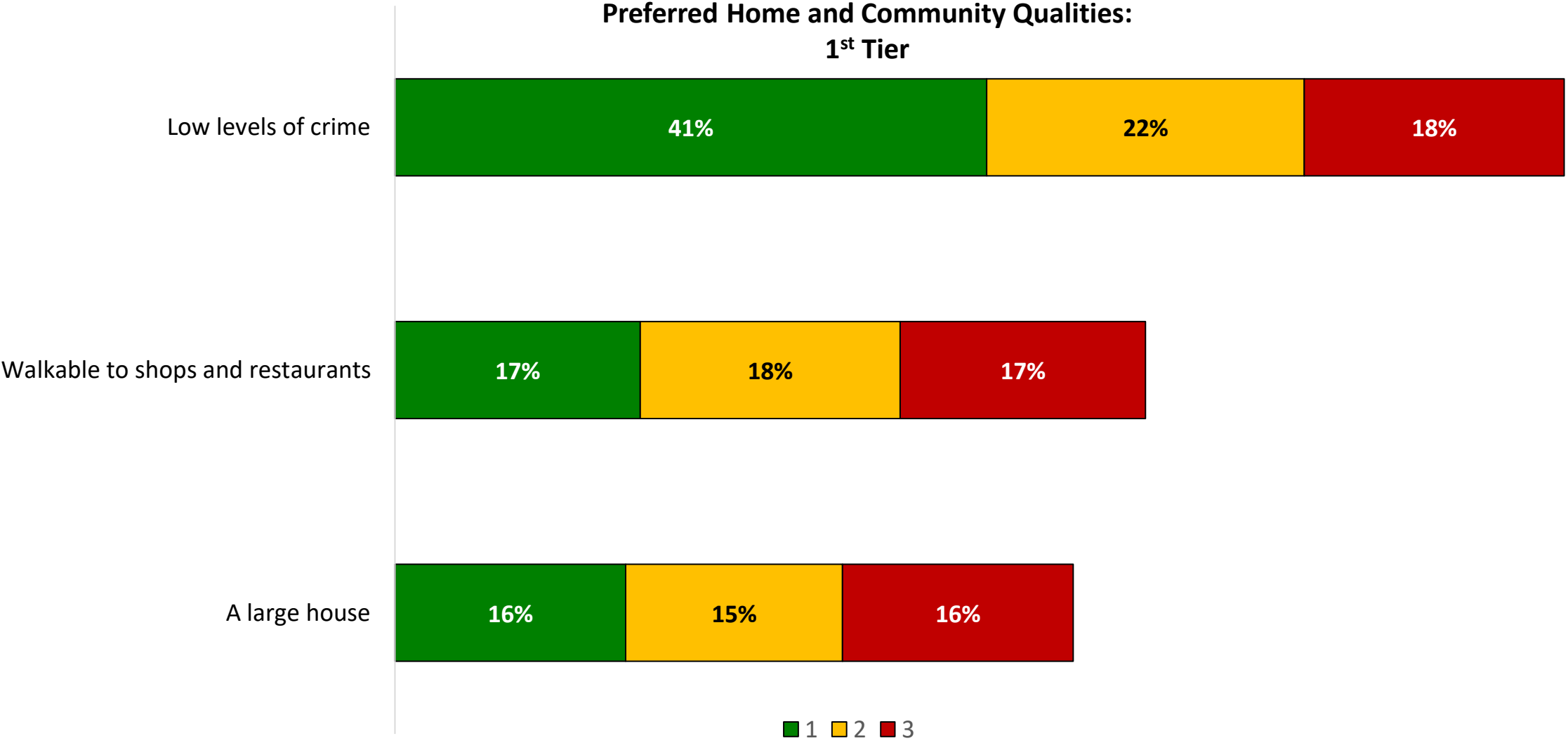
Q.7 Continue to imagine that you are moving to another home. These next questions are about the kind of community where you would like to live. Please select the community that you prefer.

Still imagine that you are moving to another home. Please rank the following home and community qualities from most important to least important.

- ***Low levels of crime***
- ***Walkable to shops and restaurants***
- ***A large house***
- ***High quality public schools***
- ***A large yard***
- ***A short commute***

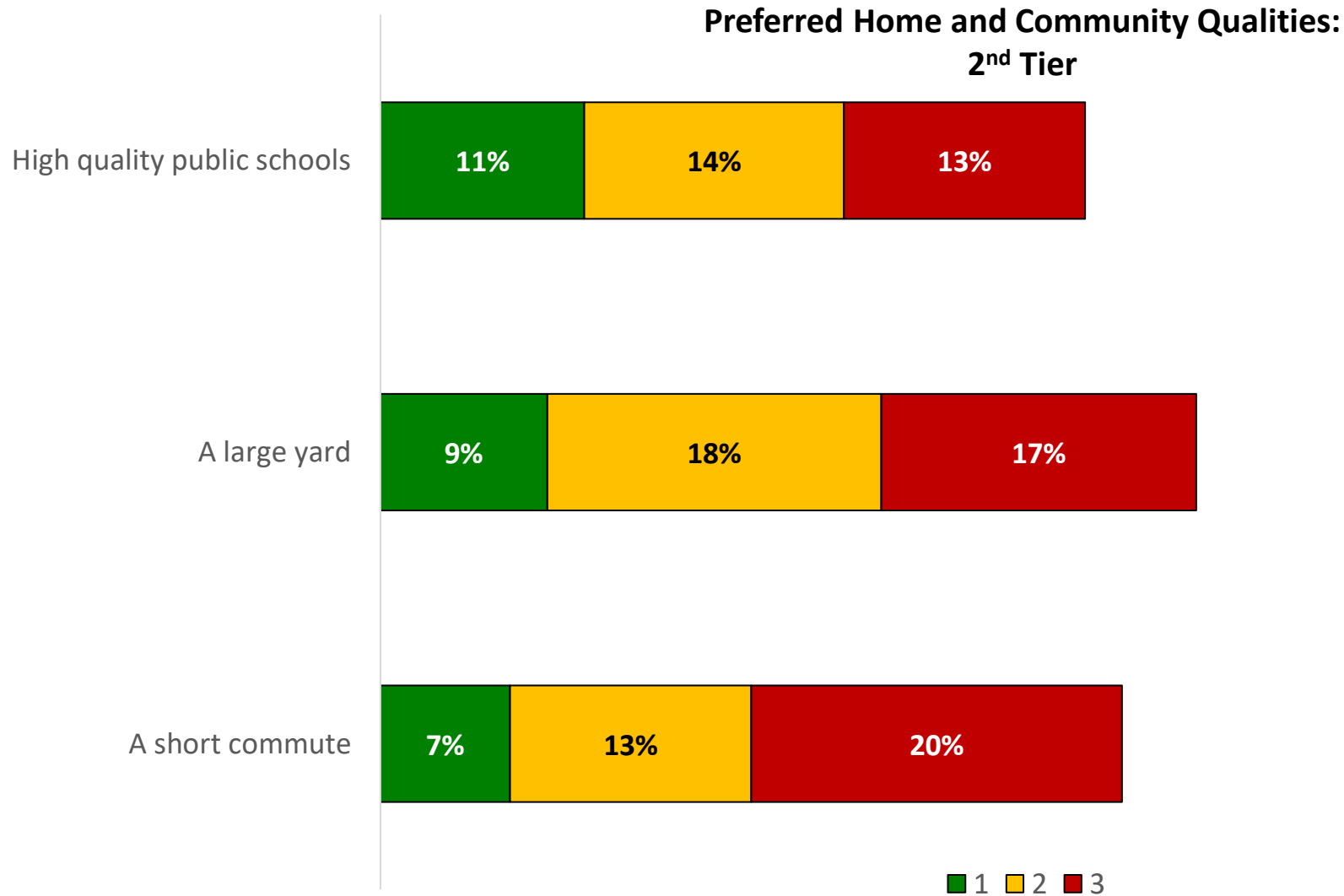


Living in a Safe Community is Most important When Choosing a Place to Live



Q.8 Still imagine that you are moving to another home. Please rank the following home and community qualities from most important to least important.

One-quarter Say a Large Yard is in Their Top Two for Home Qualities



Q.8 Still imagine that you are moving to another home. Please rank the following home and community qualities from most important to least important.

Crime Levels Important to All, But Especially Older Generations

Preferred Home and Community Qualities by Generation

Percent Ranked 1 or 2	Total	Gen Z	Millennials	Gen X	Boomers	Silent/Greatest
Low levels of crime	64	42	55	68	79	85
Walkable to shops and restaurants	35	37	35	30	36	45
A large house	31	39	33	32	25	13
A large yard	27	26	27	31	27	16
High quality public schools	24	28	32	20	17	27
A short commute	20	28	18	20	17	14

Q.8 Still imagine that you are moving to another home. Please rank the following home and community qualities from most important to least important.

Walkable Communities Are More Important to City Dwellers and Large Yards Appeal More to Rural Residents

Preferred Home and Community Qualities
by Community Type

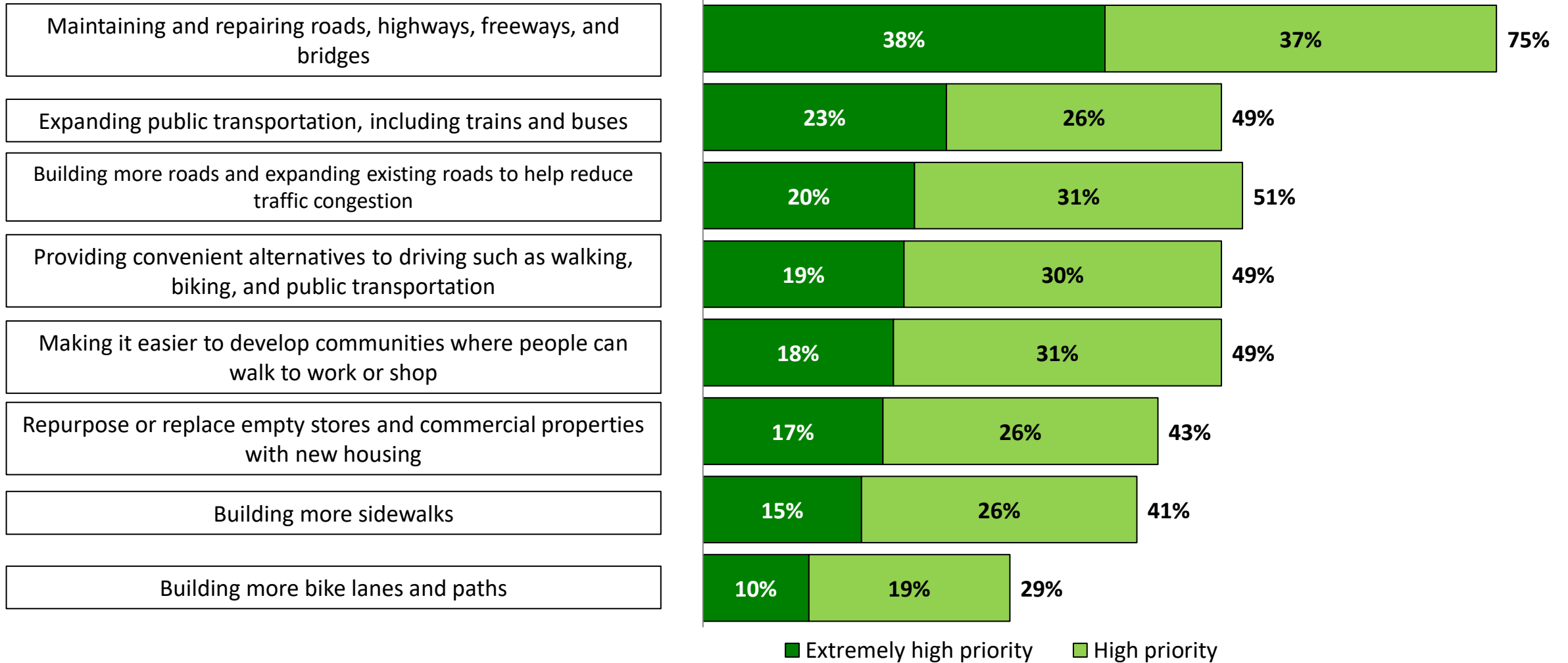
Percent Ranked 1 or 2	Total	Urban	Suburban	Rural
Low levels of crime	64	57	70	57
Walkable to shops and restaurants	35	40	32	28
A large house	31	32	29	25
A large yard	27	24	27	42
High quality public schools	24	27	24	22
A short commute	20	22	20	20

Q.8 Still imagine that you are moving to another home. Please rank the following home and community qualities from most important to least important.

Transit and Transportation

Maintaining Roads, Highways, and Bridges is Top Priority

Issue Priority for the Government

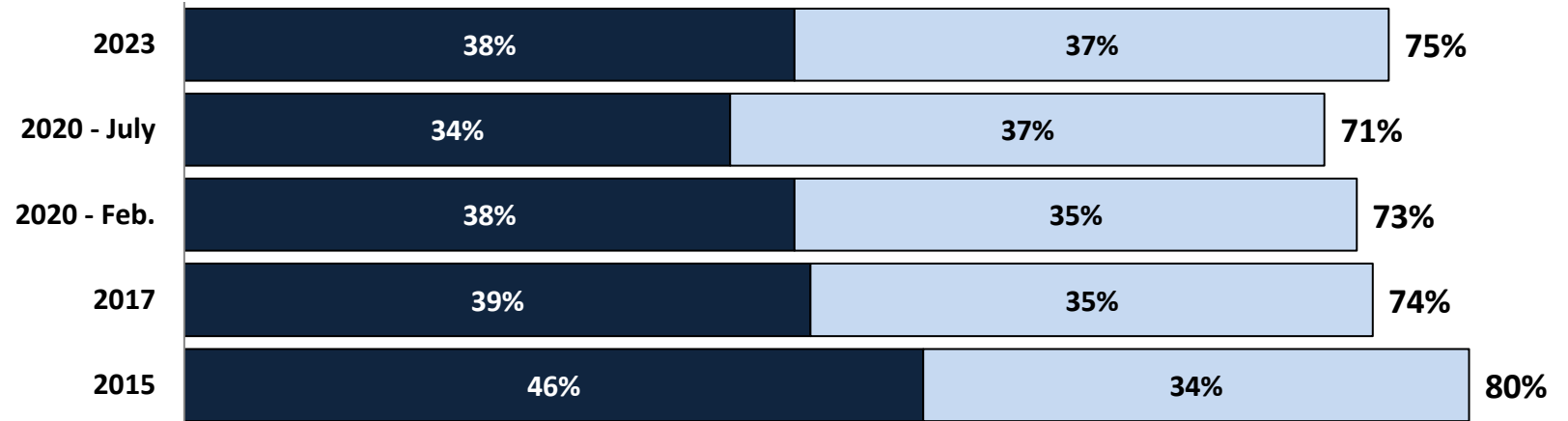


Q.9 Here are some issues your community may be facing over the next few years. For each one, please indicate how much of a priority it should be for the government:

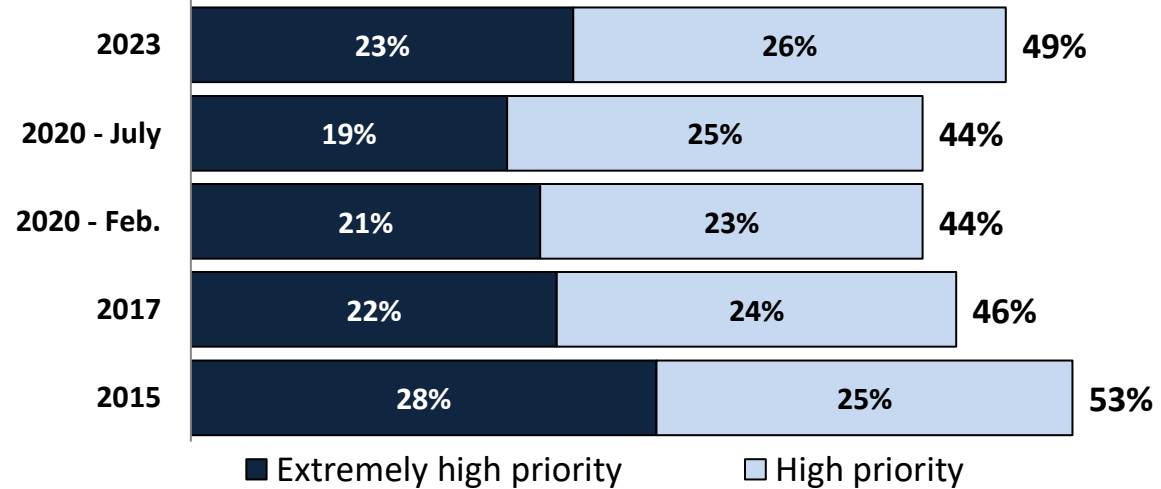
Infrastructure Maintenance Consistently A High Priority

Time Series Issue Priority for the Government: 1st Tier

Maintaining and repairing roads, highways, freeways, and bridges



Expanding public transportation, including trains and buses

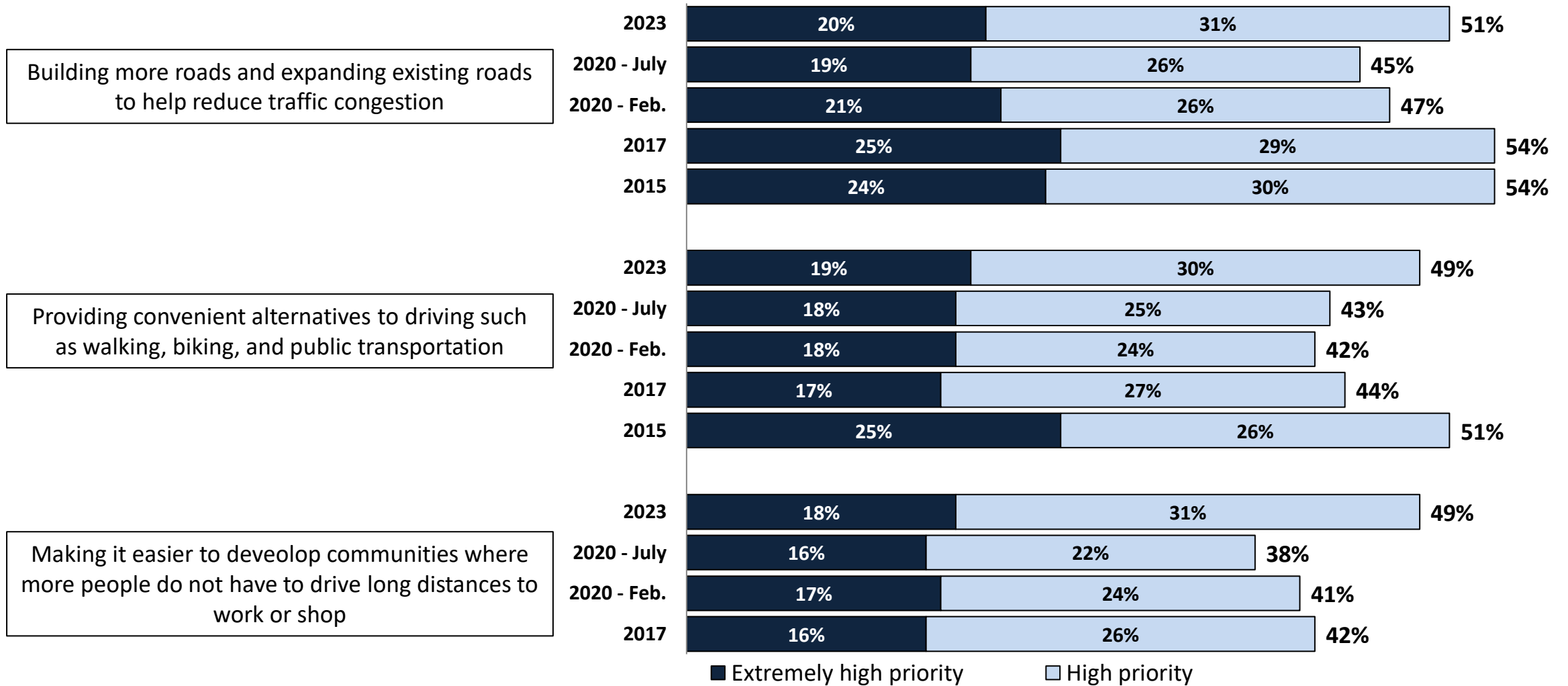


■ Extremely high priority □ High priority

Q.9 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:

Increase in Support for Developing Communities With Shorter Commutes

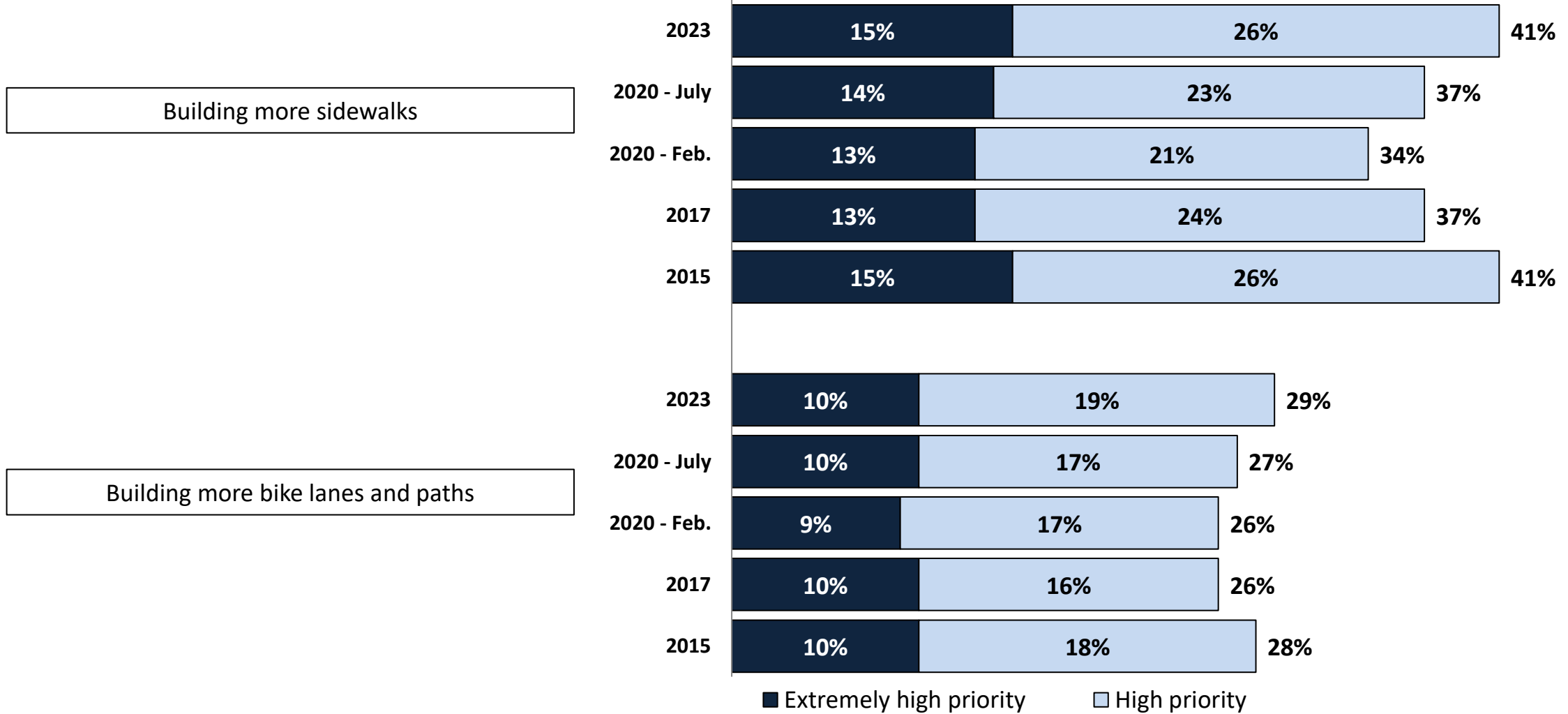
Time Series Issue Priority for the Government: 2nd Tier



Q.9 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:

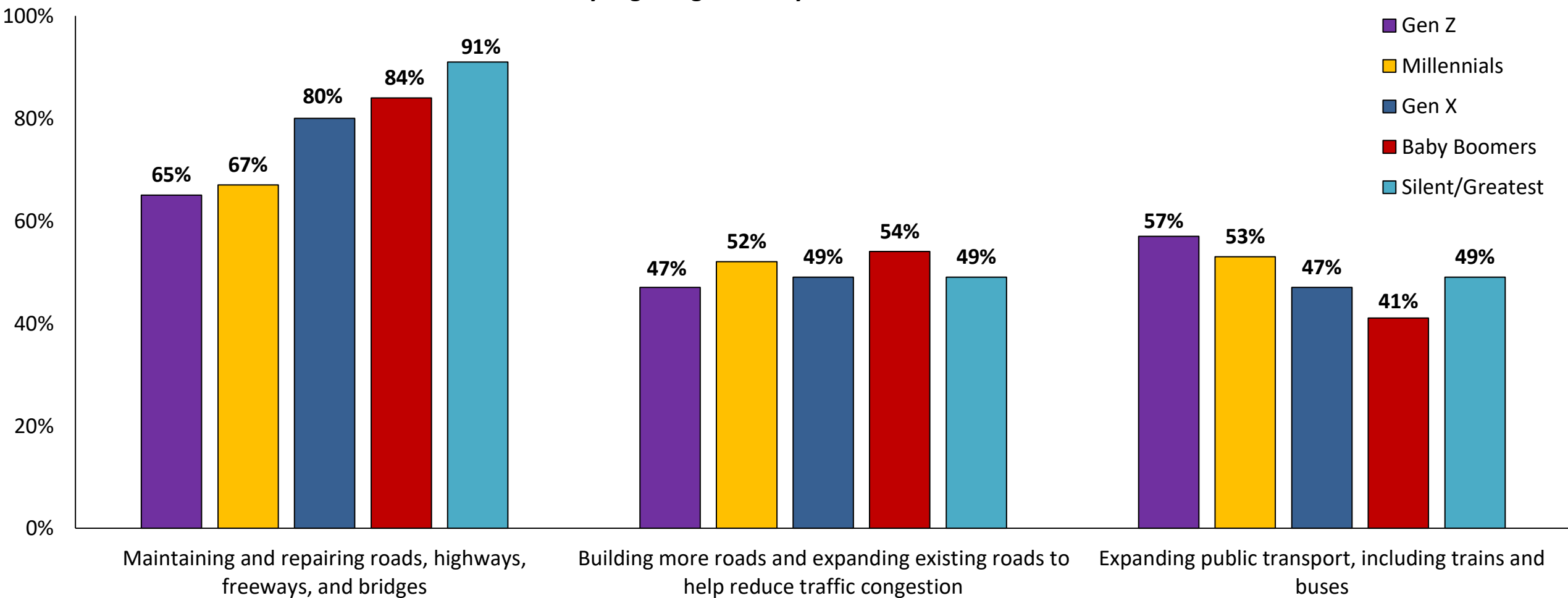
Prioritization of More Sidewalks and Bike Lanes Returns to 2015 Levels

Time Series Issue Priority for the Government: 3rd Tier



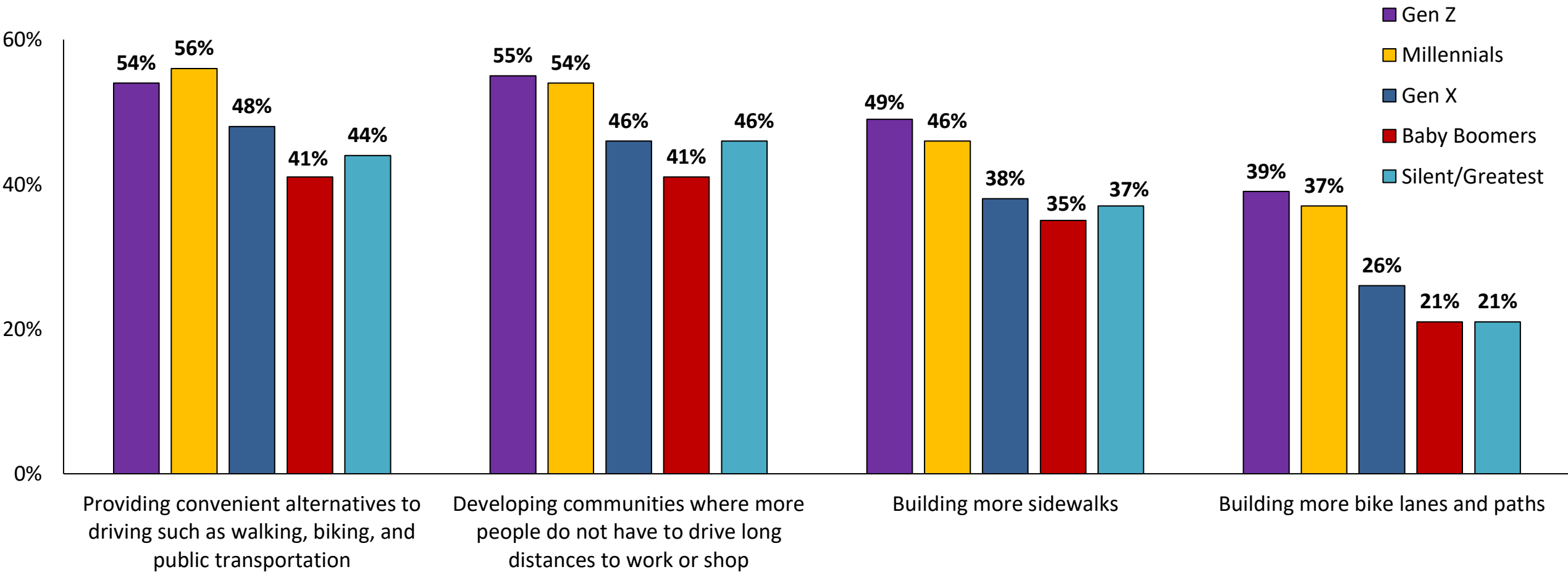
Older Generations Are Much More Focused on Road Maintenance Although A High Priority For All Generations

% Extremely High/High Priority for the Government: 1st Tier



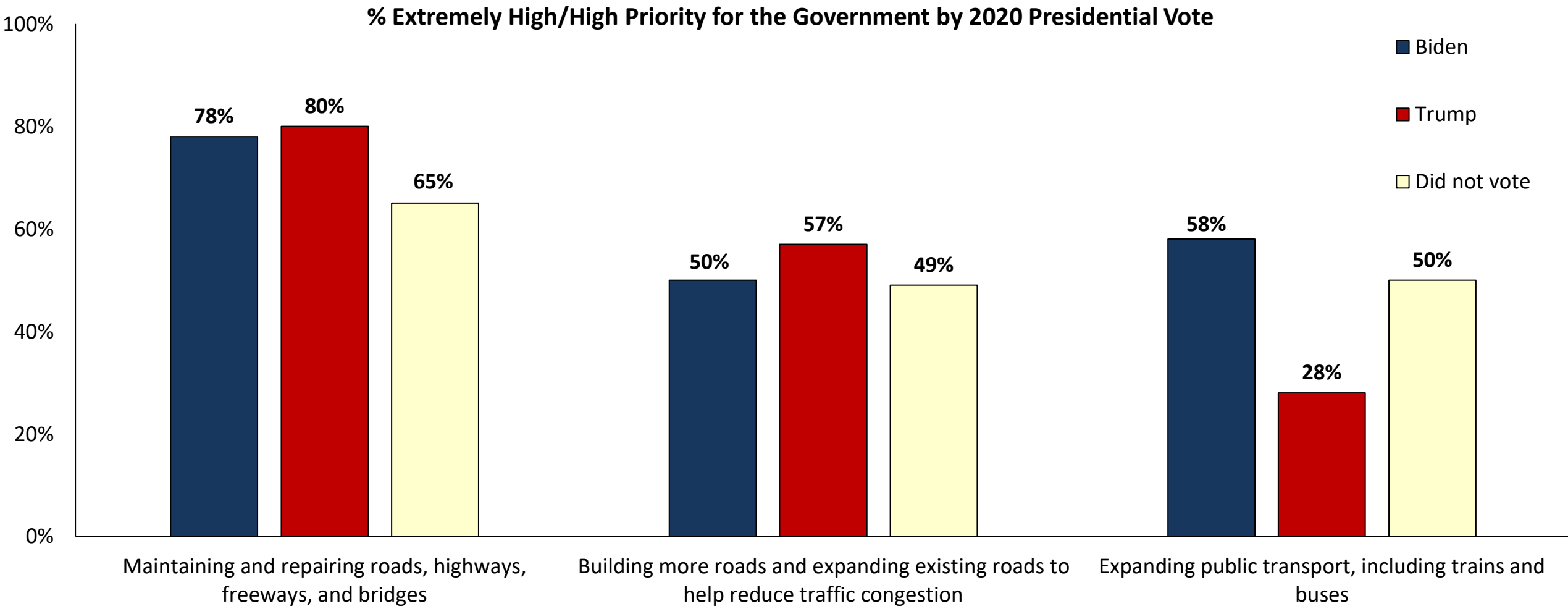
Millennials and Gen Z Place a Higher Priority on Transportation Alternatives and Walkable Communities

% Extremely High/High Priority for the Government: 2nd Tier



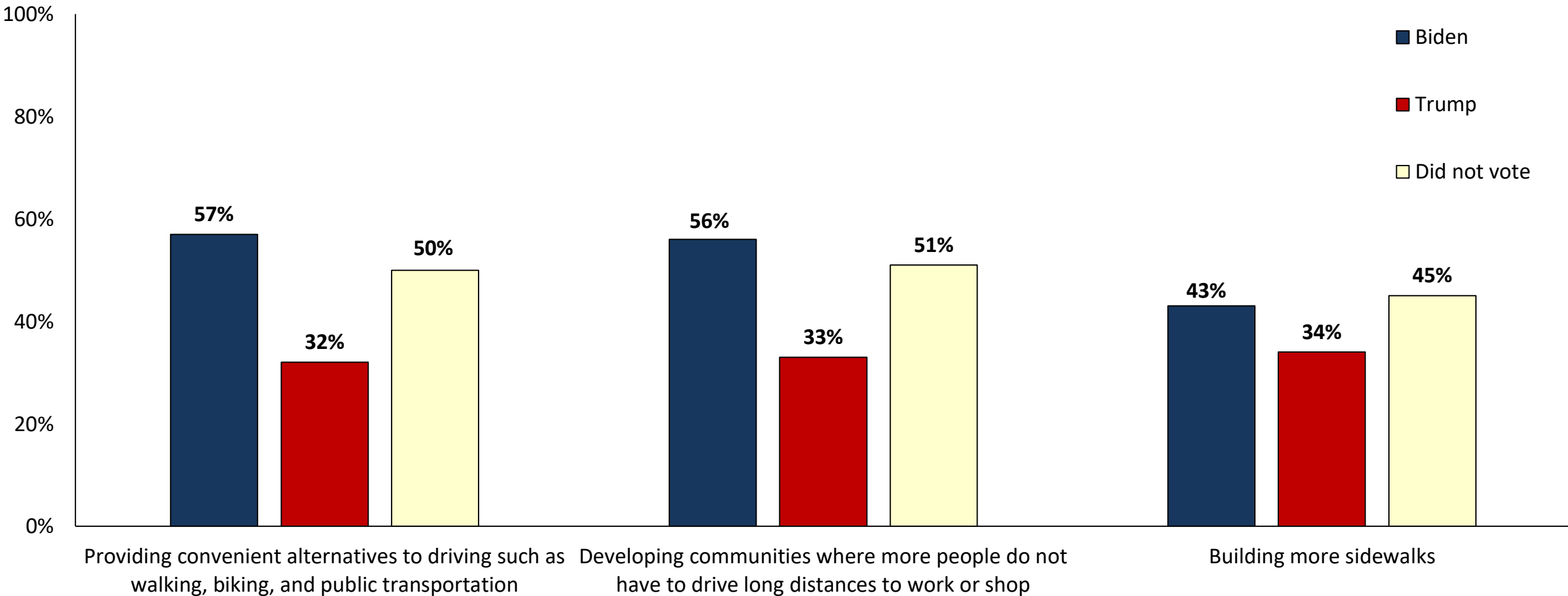
Q.9 Here are some issues your community may be facing over the next few years. For each one, please indicate how much of a priority it should be for the government:

Biden and Trump Voters Agree on the Importance of Maintaining Roads and Highways



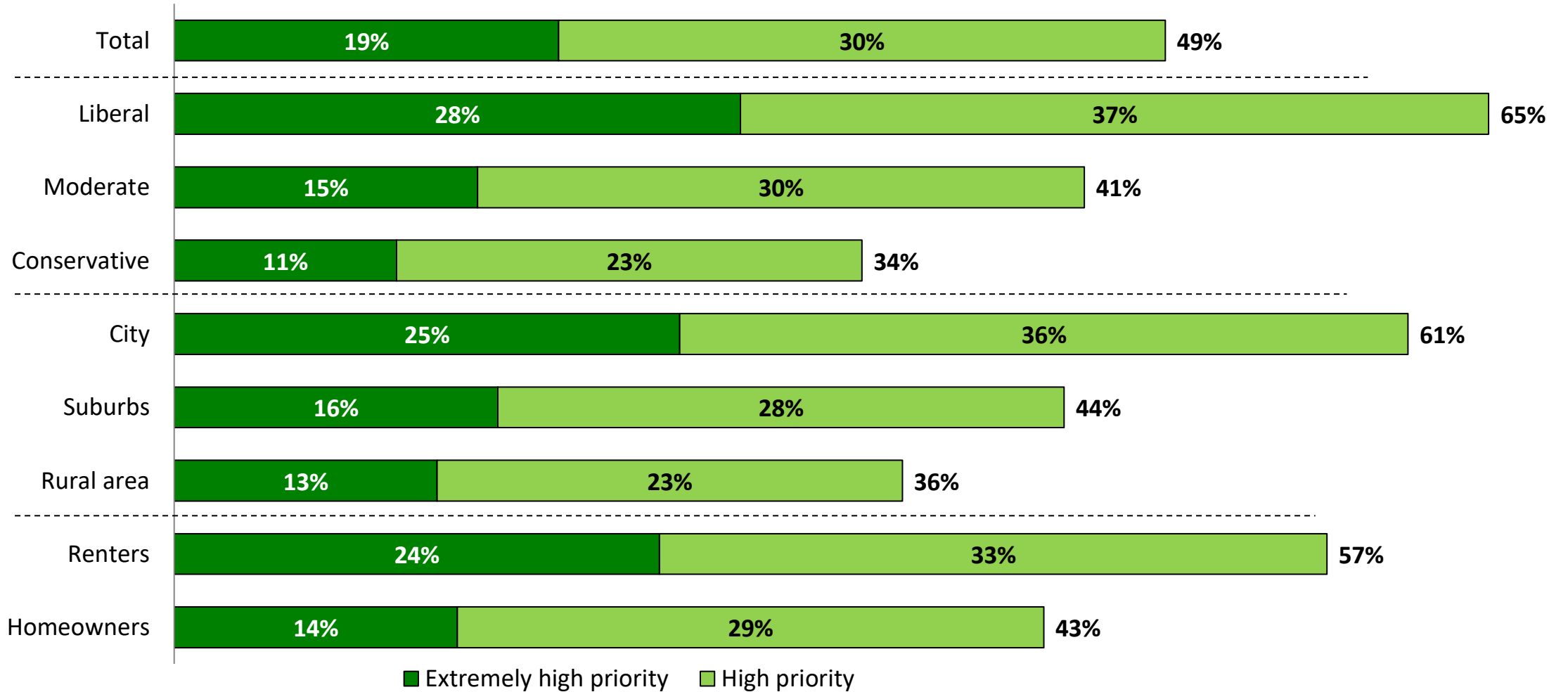
Trump Voters Are Least Likely to Support Walkable Communities and Alternative Transportation

% Extremely High/High Priority for the Government by 2020 Presidential Vote



Ideology and Current Housing Density Drive Preference on Providing More Transportation Options

Providing Alternatives to Driving: Percent High Priority by Demographics

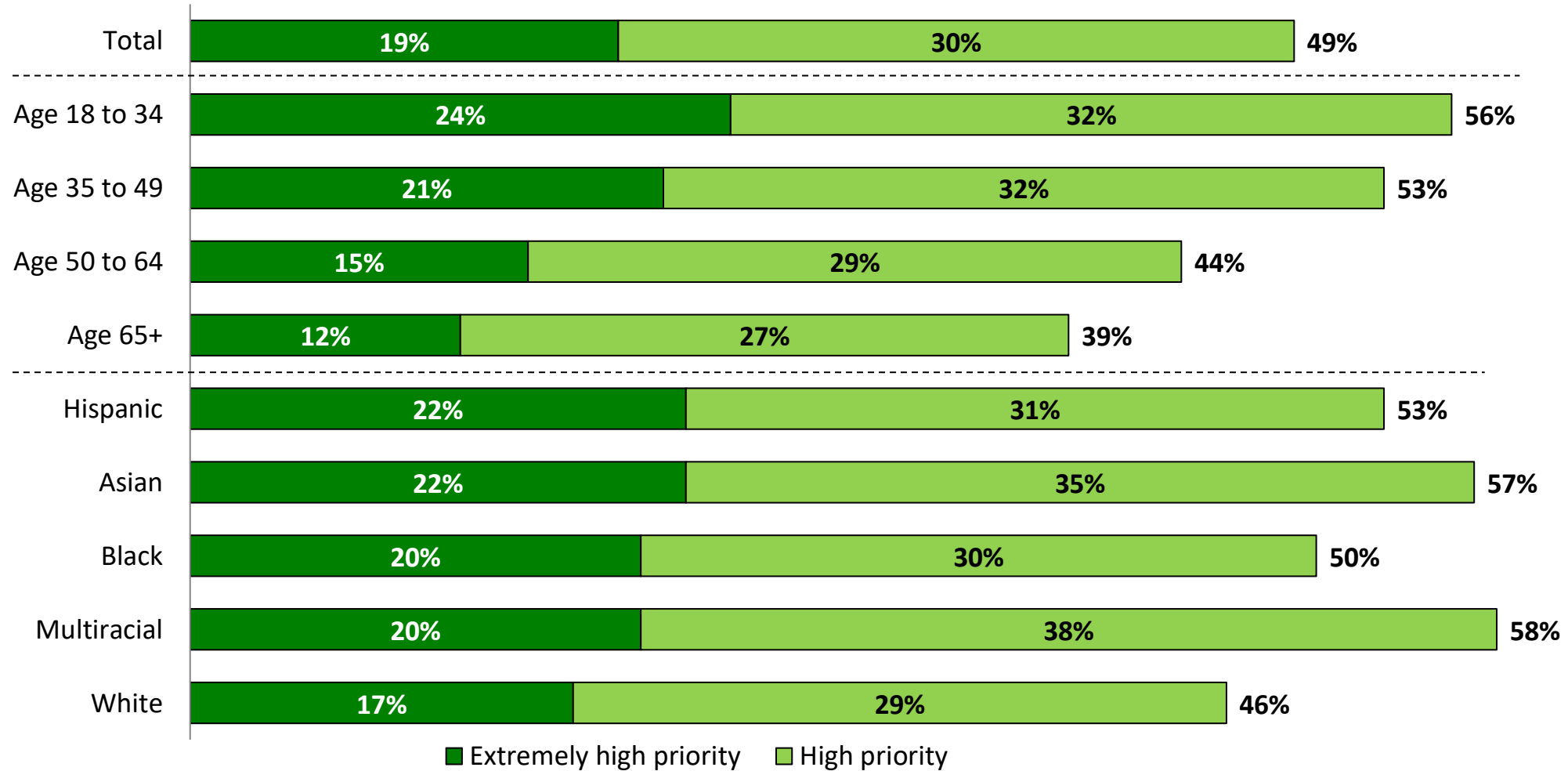


Q.9 Here are some issues your community will be facing over the next few years. For each one please indicate how much of a priority it should be for your community to address: Should it be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for your state government?

Providing convenient alternatives to driving such as walking, biking, and public transportation

Younger Respondents and People of Color Place Higher Priority On Alternatives to Driving

Providing Alternatives to Driving: Percent High Priority by Demographics

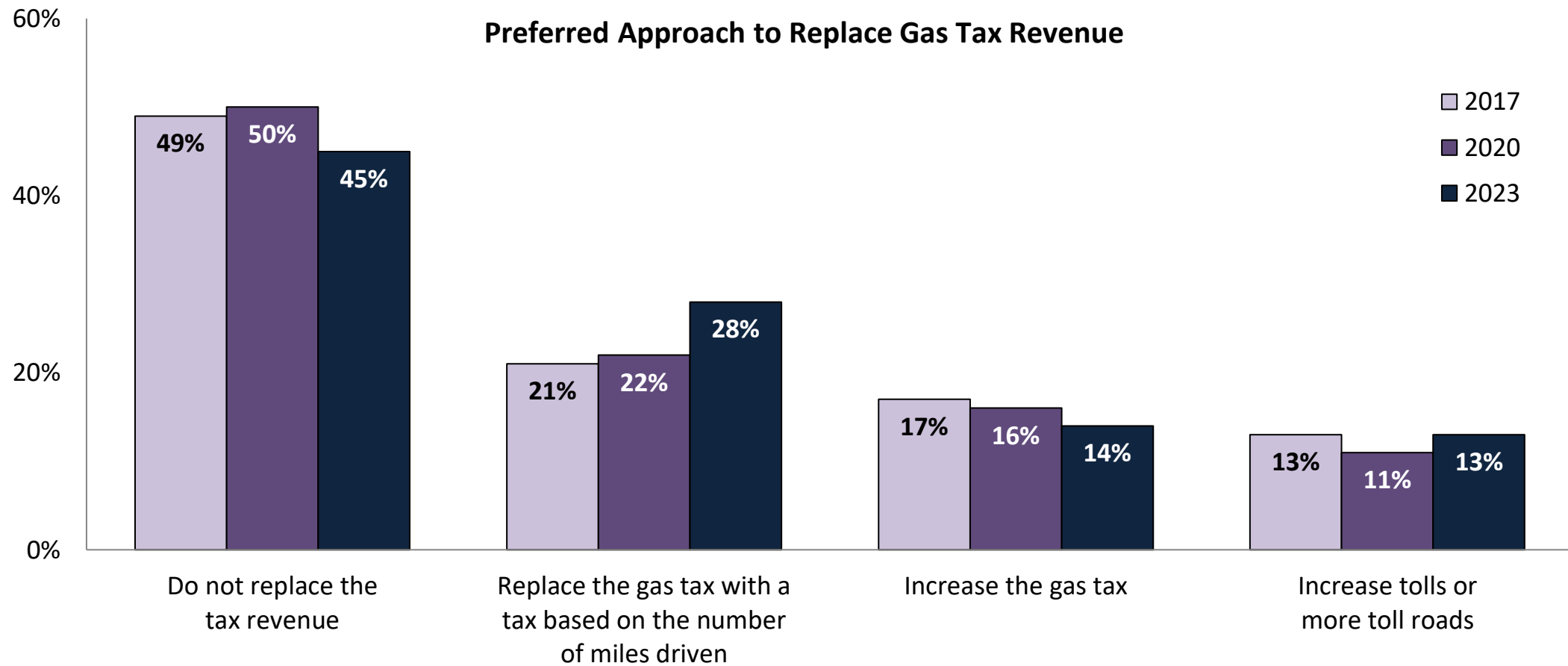


Q.9 Here are some issues your community will be facing over the next few years. For each one please indicate how much of a priority it should be for your community to address: Should it be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for your state government?

Providing convenient alternatives to driving such as walking, biking, and public transportation

Half Would Prefer Not to Replace Shrinking Gas Tax Revenue

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

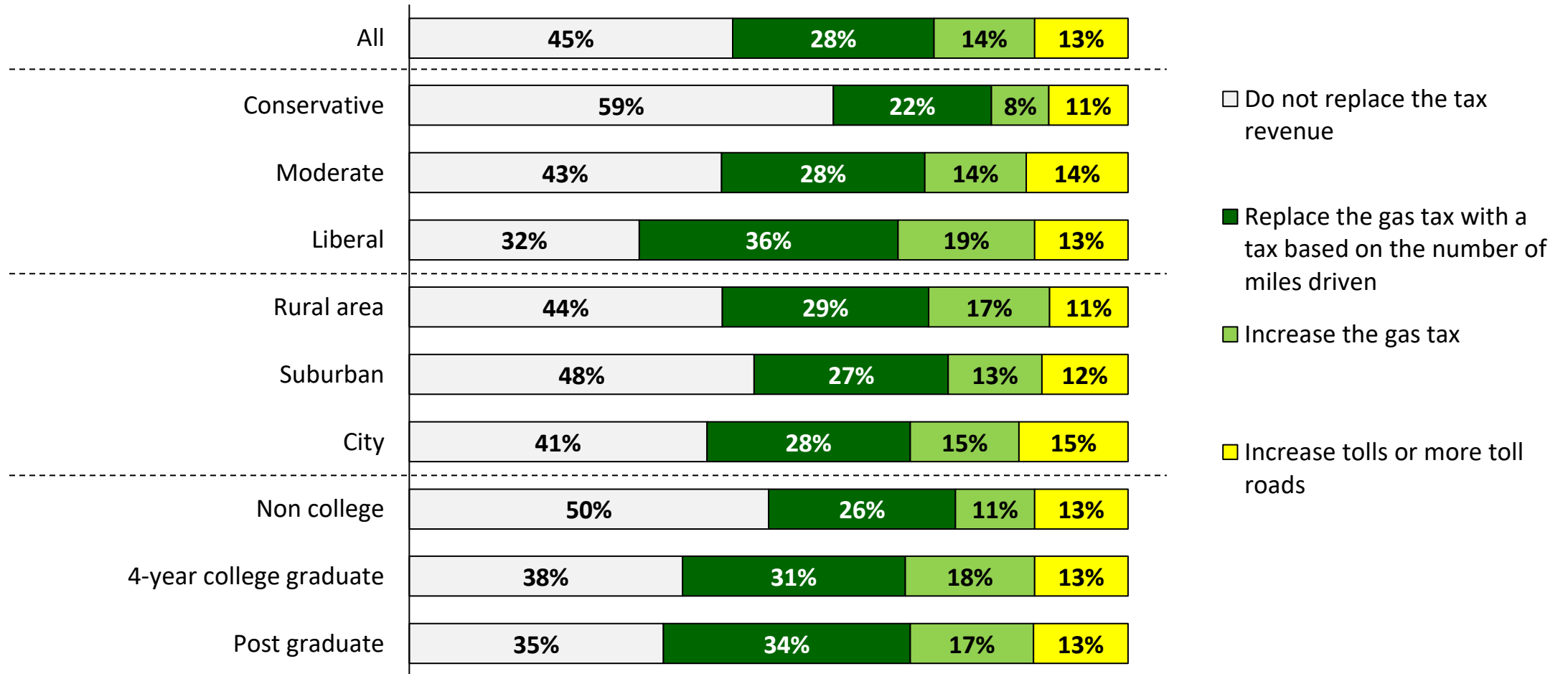


Q.10 Switching gears a bit, as you may know, increased fuel efficiency in cars has resulted in less gas tax funding to support roads and transit. Thinking about this, which ONE of the following approaches would you take to replace that tax revenue?

Ideology, Urbanicity, and Education Drive Interest in Replacing Gas Tax Revenue

Liberals and college graduates more open to gas tax increases

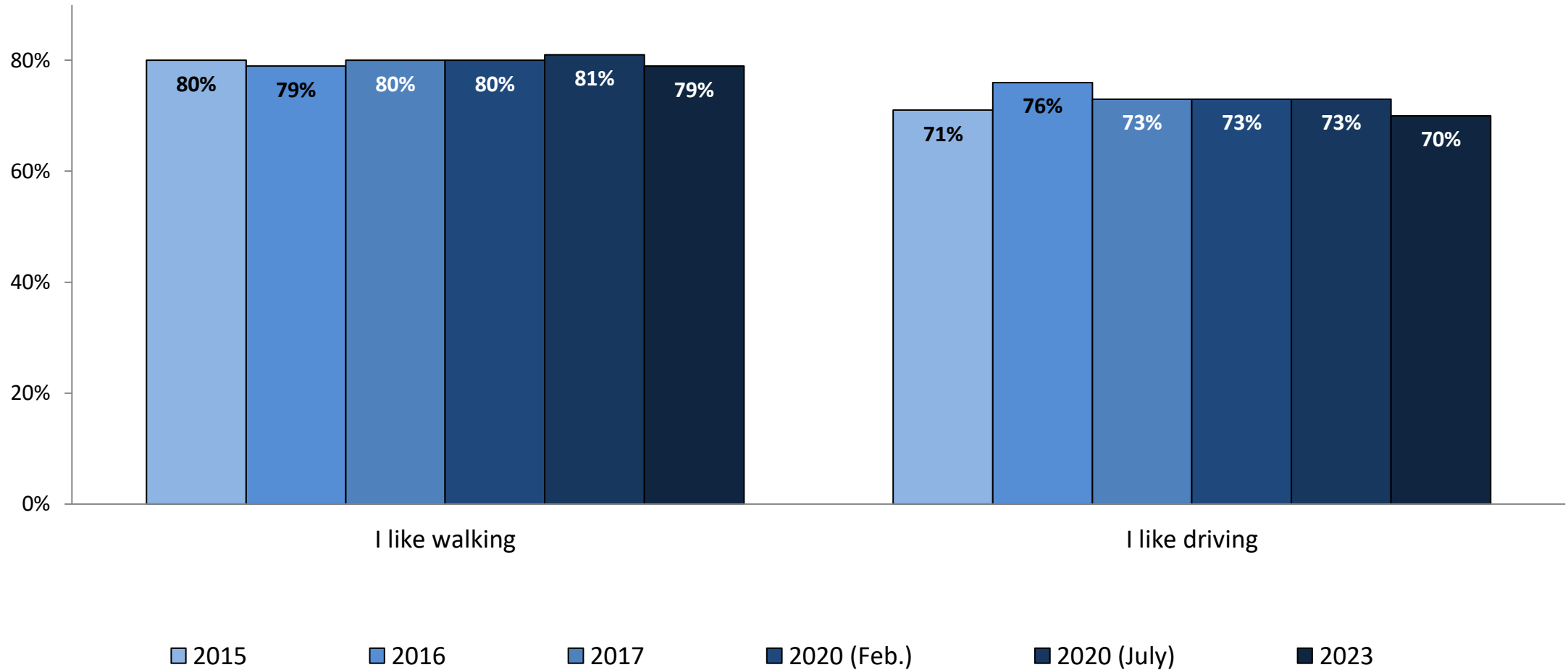
Preferred Approach to Replace Gas Tax Revenue by Ideology and Income



Q.10 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?

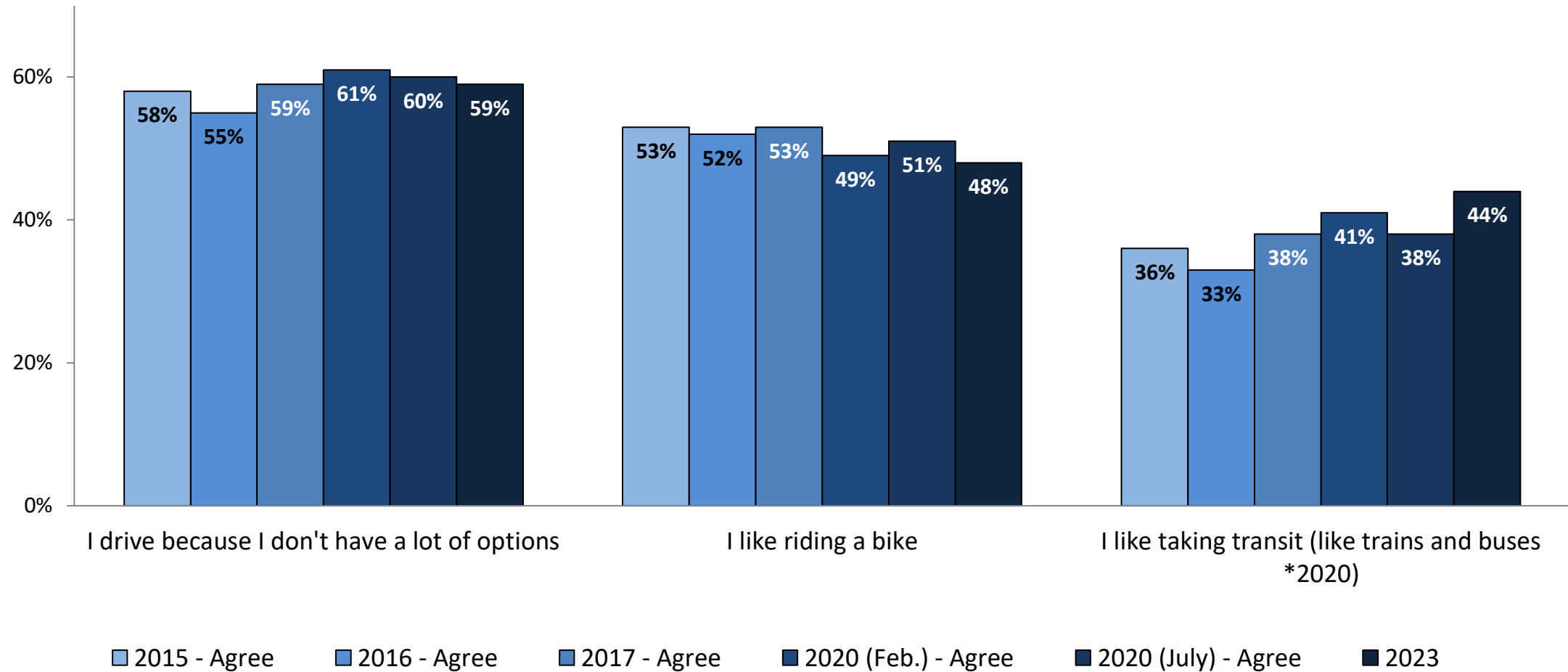
Enjoyment of Walking and Driving Hold Steady

Changes in Travel Preferences: 1st Tier (Percent Agree)



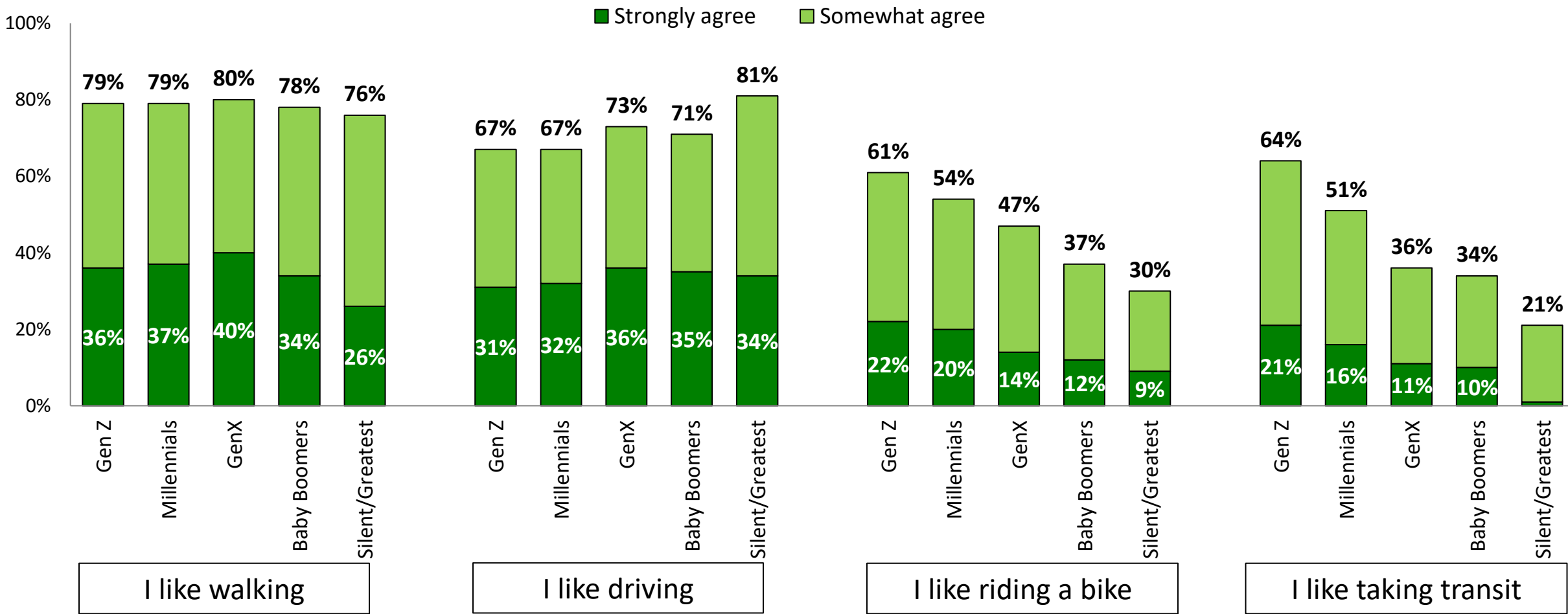
Slow Increase in Transit Appeal Over the Past Four Years

Changes in Travel Preferences: 2nd Tier



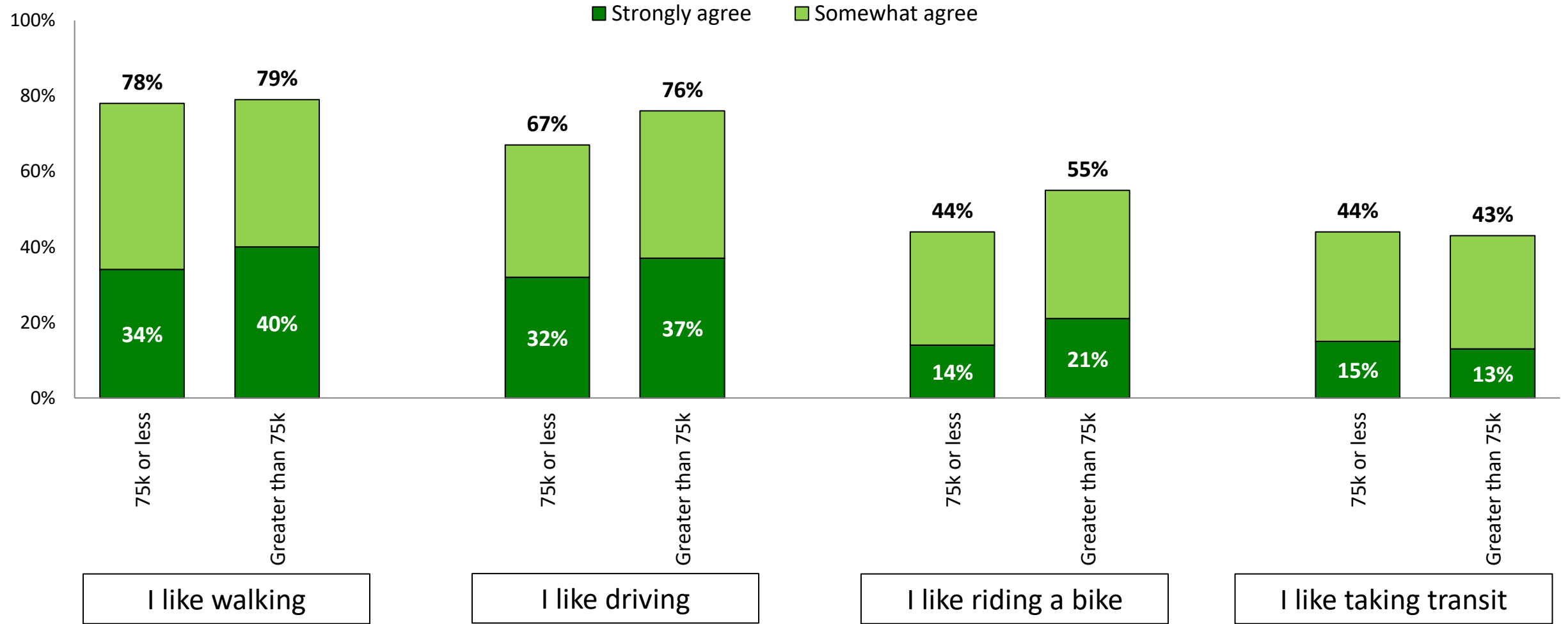
Gen Z & Millennials More Likely to Like Riding a Bike or Taking Transit

Attitudes Towards Travel Modes by Generation



Income Differences Create Little Variation When It Comes To Transportation Preferences

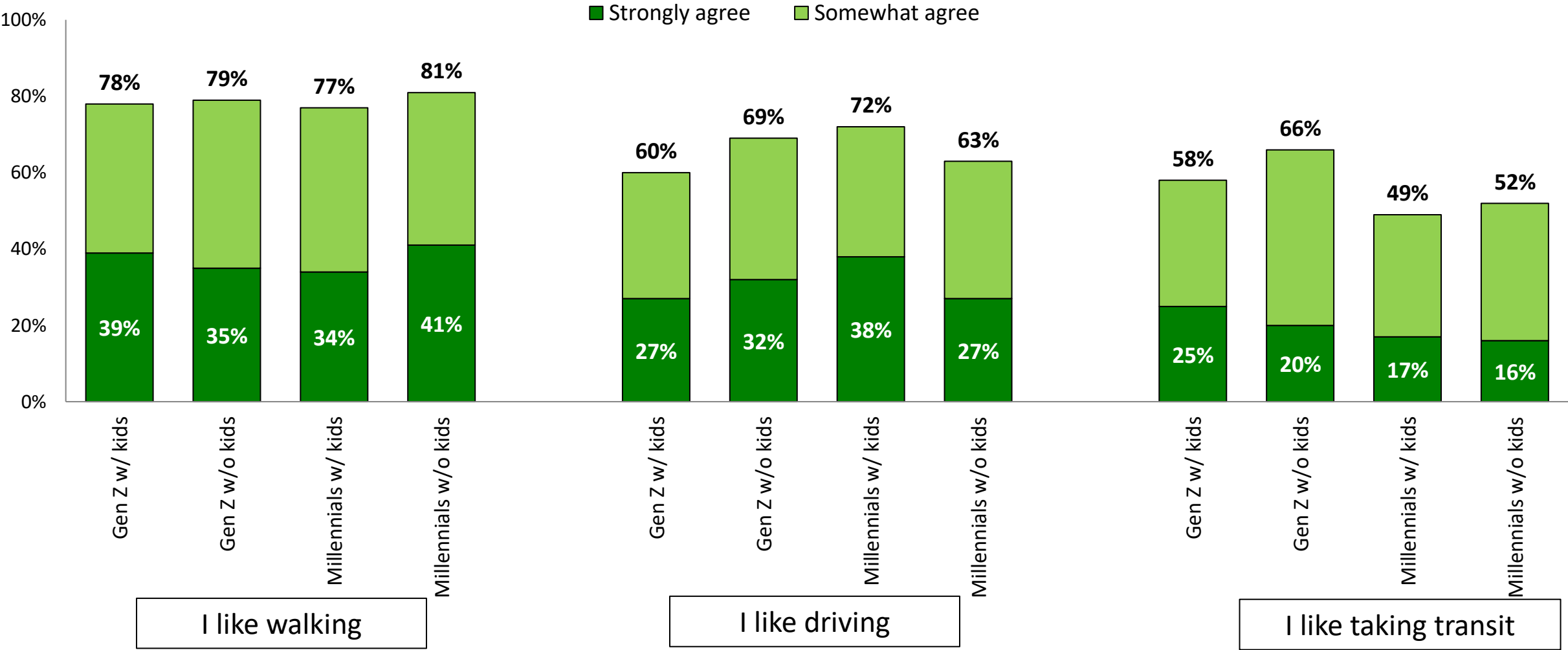
Attitudes Towards Travel Modes by Annual Household Income



Q.11 Now, we'd like to ask about your preferences regarding your daily travel. For each statement, please tell me if you agree or disagree.

Gen Z With and Without Children Are Most Likely to Like Taking Transit

Attitudes Towards Travel Modes by Generation/Children at Home

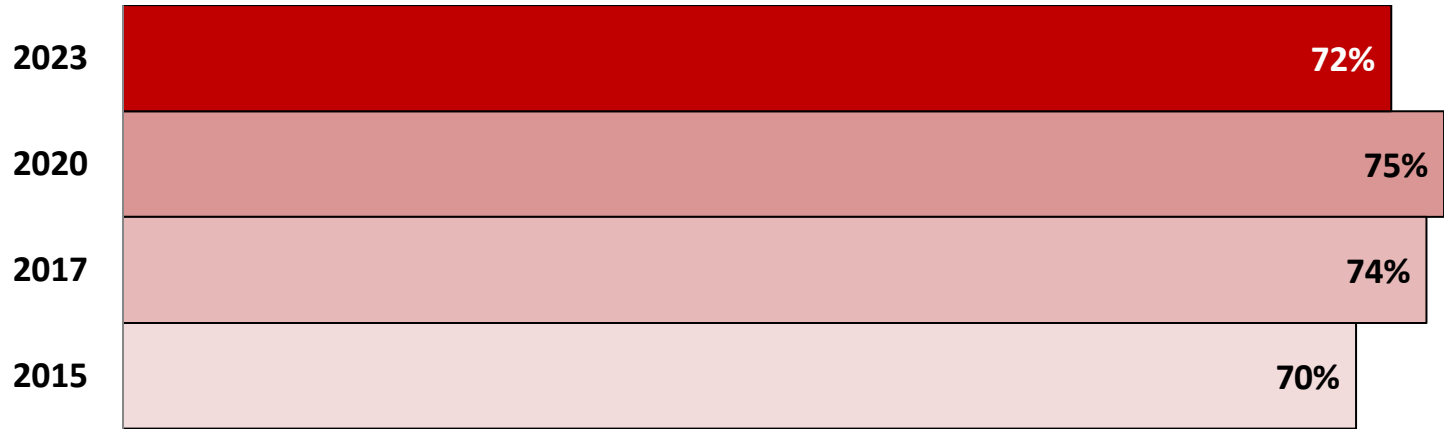


Walking

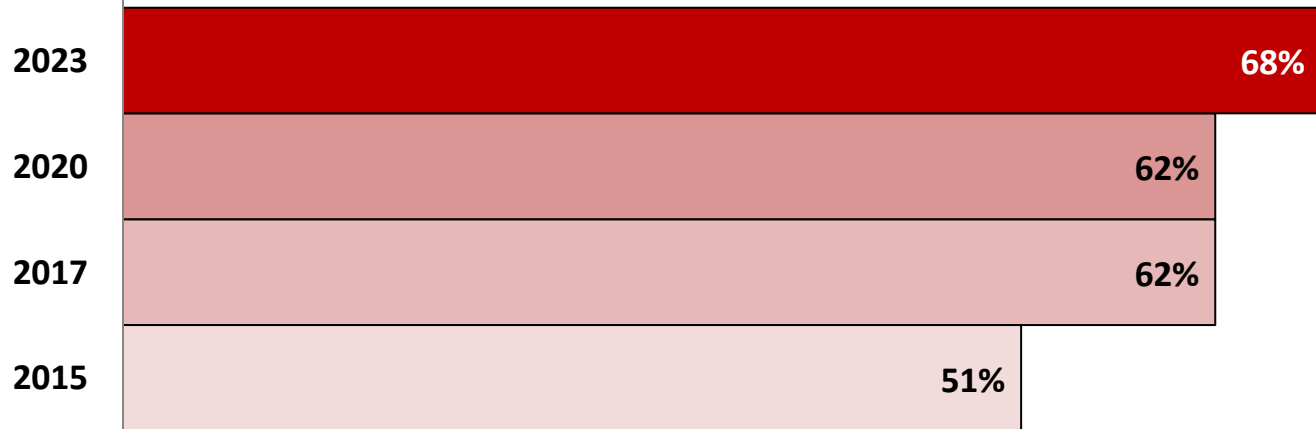
Distance, Need for Vehicle Primary Reasons for Not Walking More

Things That Keep You From Doing More Walking: 1st Tier

The places I need to go are too far to walk.



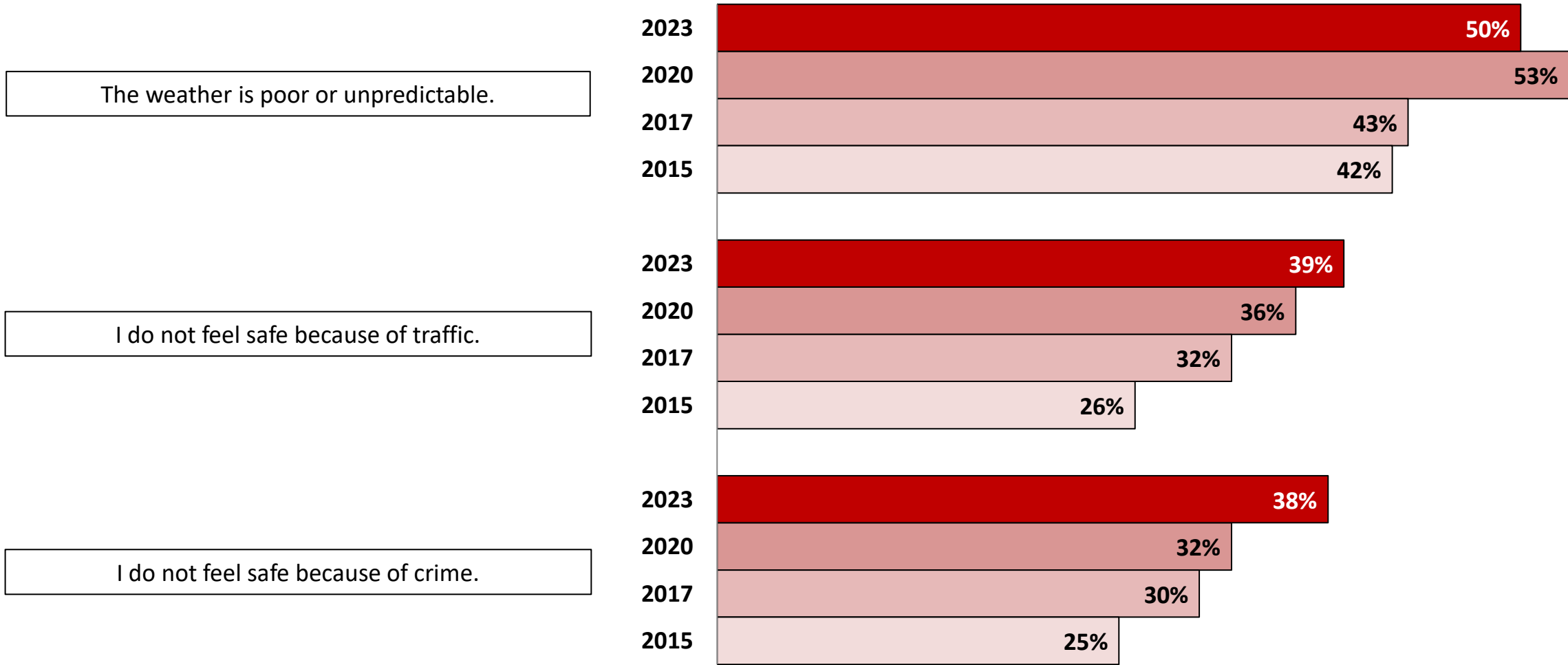
I need a vehicle for work or school or other reason.



Q.12 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.

Steady Increase in Those feeling Unsafe due to Traffic

Things That Keep You From Doing More Walking: 2nd Tier

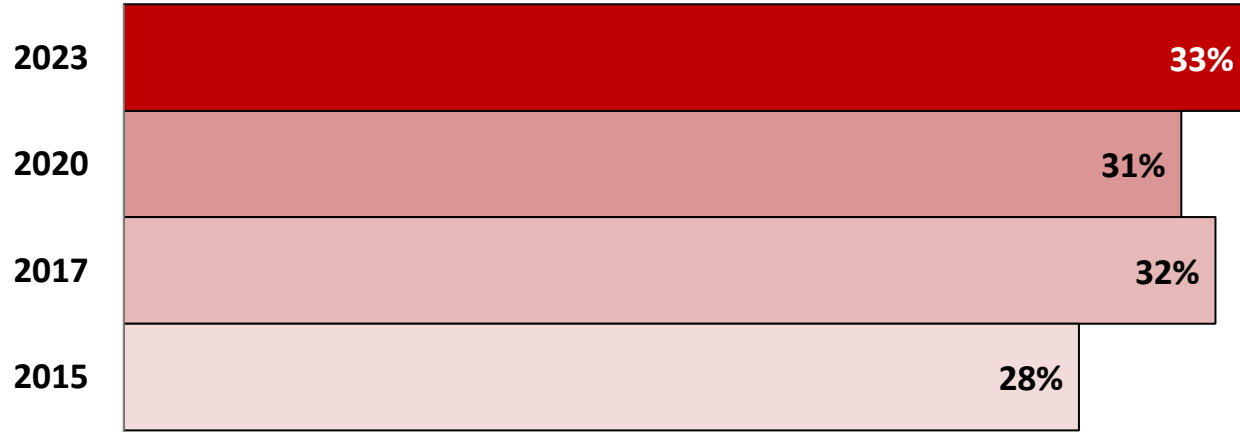


Q.12 Now think about things that may keep you from doing more walking. Please indicate if each of the following keeps you from doing more walking.

Lack of Sidewalks and Poor Health are Not Common Obstacles to People Walking More

Things That Keep You From Doing More Walking: 3rd Tier

There are too few sidewalks or trails.



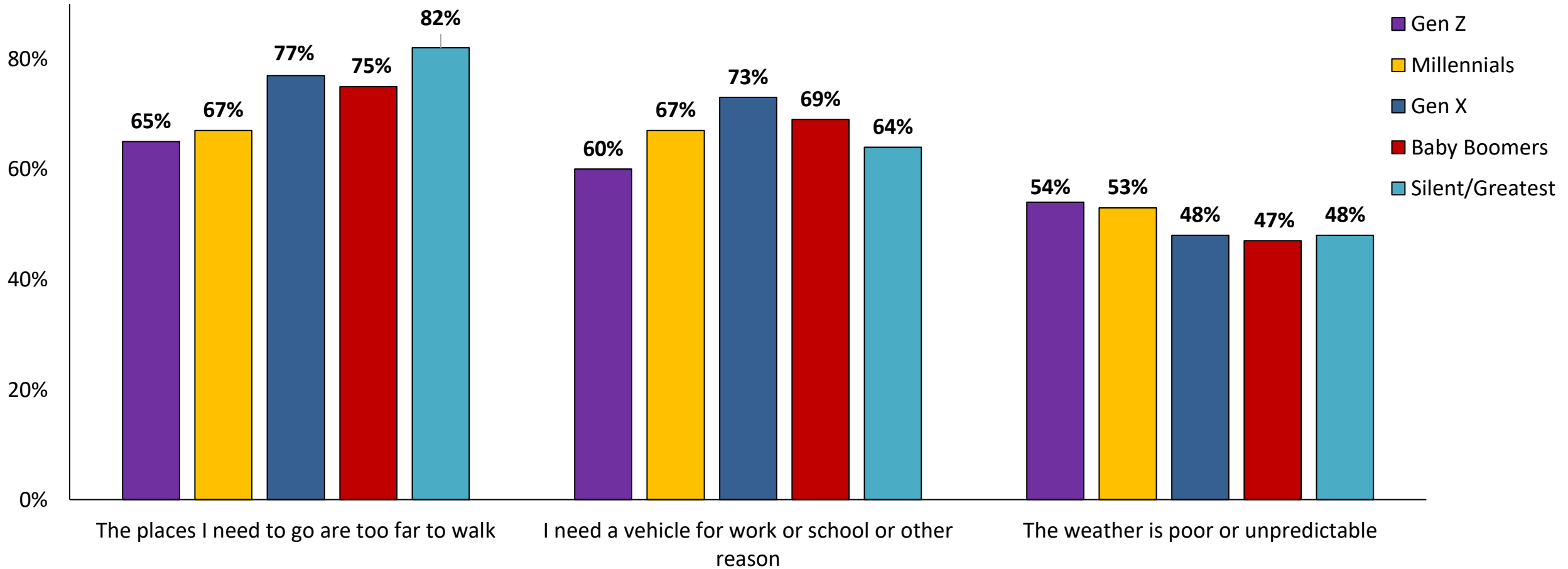
My health prevents me.



Q.12 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.

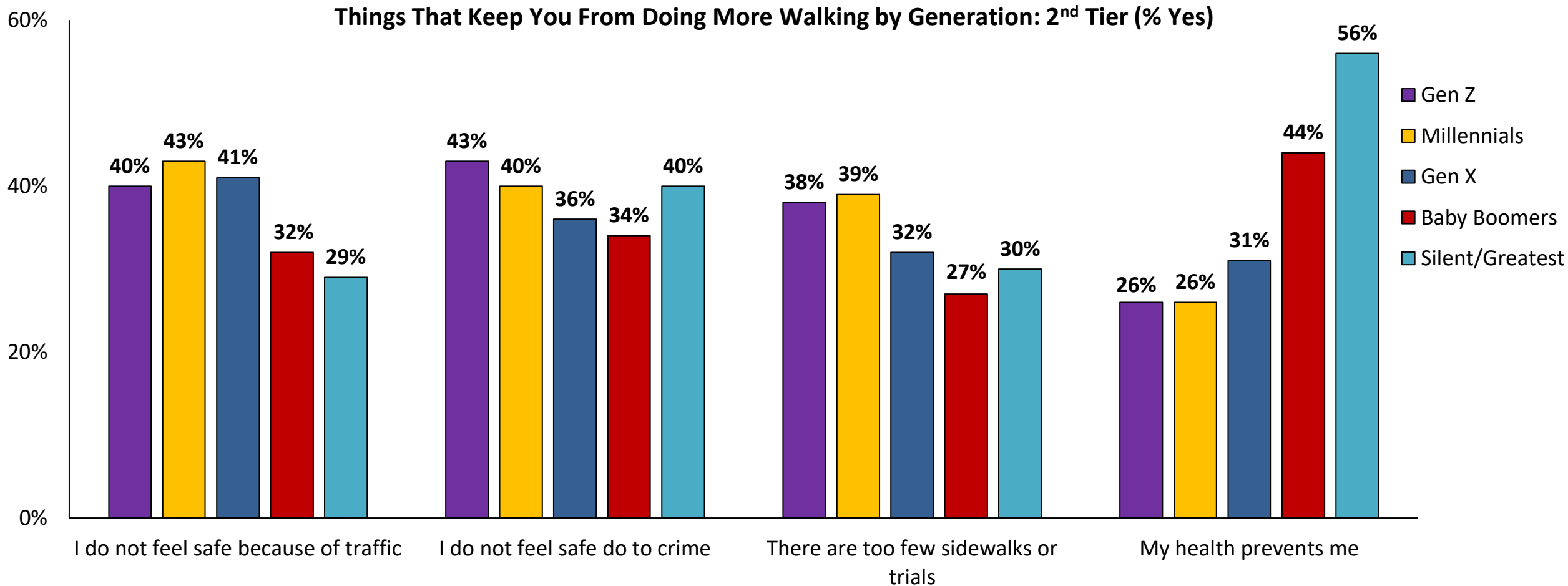
Older Generations More Likely to Need a Car to Get to Where They Need to Go

Things That Keep You From Doing More Walking by Generation: 1st Tier (% Yes)



Younger Generation More Likely to Feel Unsafe Due to Traffic

Older generations' walking ability limited by poor health

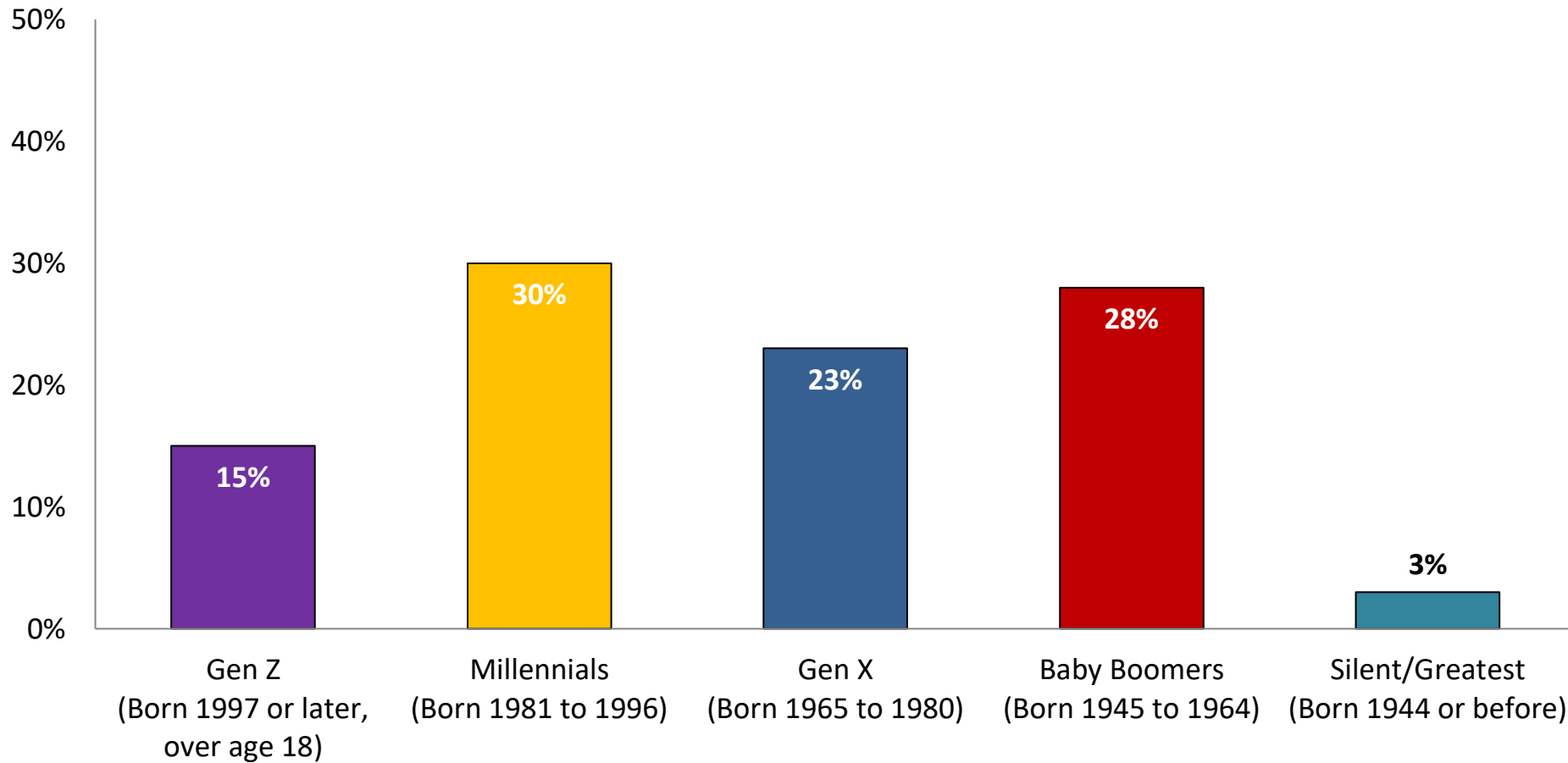


Demographics

Our Sample vs. ACS (Census) Data

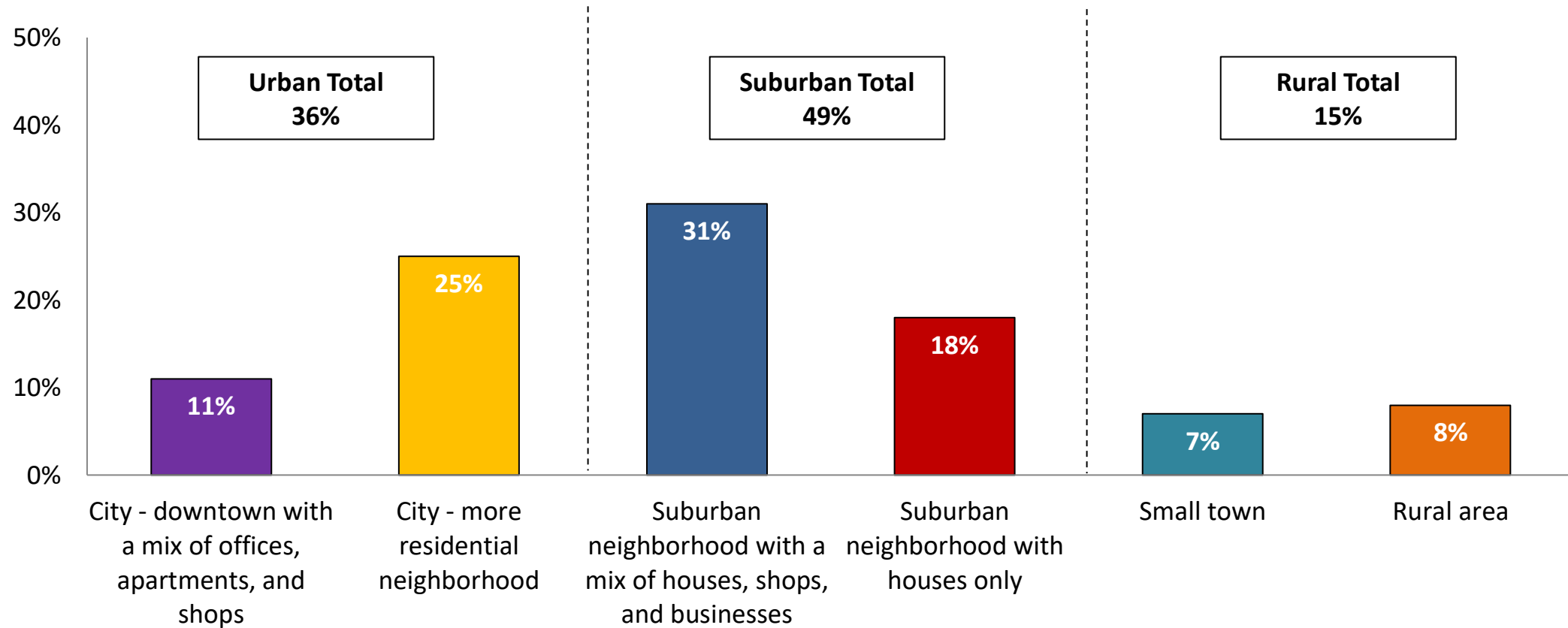
		50 largest MSAs	Survey sample
Race <i>(2019 3yr ACS)</i>	White	54%	54%
	Black or African American	14%	14%
	Hispanic	20%	20%
	Another race	11%	11%
Gender <i>(2019 ACS 5yr)</i>	Male	48%	48%
	Female	52%	52%
Age <i>(2019 ACS 5yr)</i>	18-29	21%	21%
	30-39	18%	19%
	40-49	17%	15%
	50-64	24%	26%
	65+	19%	19%
Education - 25 years and over <i>(2019 ACS 5yr)</i>	High school graduate (or equivalent) or less	36%	36%
	Some college or Associates	29%	22%
	Bachelor's degree	22%	22%
	Graduate or professional degree	13%	13%

Distribution of Sample by Generation



Q.15 In what year were you born?

Distribution of Type of Community



Q.15 In what year were you born?

Home Ownership Status by Region and Urbanicity

Homeownership Status by Demographics Groups	Own	Rent	Living with friends or family
Total	53%	36%	11%
South	55%	34%	11%
South West	54%	33%	14%
Middle America	59%	31%	10%
North East	52%	35%	13%
West Coast	49%	38%	13%
New York City	47%	43%	11%
Los Angeles	46%	47%	8%
City	43%	47%	10%
Suburban	58%	29%	13%
Rural/Small town	60%	33%	7%

Home Ownership Status by Generation, Education/Gender, and Income

Homeownership Status by Demographics Groups	Own	Rent	Living with friends or family
Total	53%	36%	11%
Gen Z	28%	44%	28%
Millennials	44%	42%	15%
Gen X	57%	37%	6%
Baby Boomers	69%	28%	4%
Silent/Greatest	90%	6%	4%
College men	70%	21%	9%
College women	63%	29%	7%
Non-college women	42%	44%	14%
Non-college men	49%	39%	13%
Income less than \$75k	41%	49%	10%
Income \$100k-\$150k	75%	18%	7%
Income more than \$200k	85%	12%	3%

Survey Methodology

Survey Methodology

American Strategies designed this Internet survey of the top 50 metropolitan statistical areas in the United States. The survey reached 2,000 adults, 18 years or older. The survey was conducted by YouGov on March 20-April 3, 2023.

YouGov interviewed 2,153 respondents who were then matched down to a sample of 2,000 to produce the final dataset. The respondents were matched to a sampling frame on gender, age, race, and education. The frame was constructed by stratified sampling from the 2019 American Community Survey (ACS) 1-year sample with selection within strata by weighted sampling with replacements (using the person's weights on the public use file). The demographic characteristics of the top 50 MSAs were calculated by mapping PUMAs on the ACS to MSAs correspondence files from the Geocorr 2022: Geographic Correspondence Engine (Missouri Census Data Center). 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, and Target Smart regions. The propensity scores were grouped into deciles of the estimated propensity score in the frame and post-stratified according to these deciles.

The weights were then post-stratified on a four-way stratification of gender, age (4-categories), race (4-categories), and education (4-categories), and a post-stratification on parents with children under 19, to produce the final weight.