



Opinion Research
Strategic Communication

Americans' Views on their Communities, Housing, and Transportation

Analysis of a national survey of 1,202 adults

For the Urban Land Institute

March 2013

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- A. Detailed Methodology
- B. Crosstab Tables
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Introduction

The Urban Land Institute (ULI) asked Belden Russonello Strategists LLC to research Americans' satisfaction with their communities, housing, and transportation and what they want for themselves and their families. The survey results reported here cover the public's choices and expectations about where they live and how they travel to work and school and should serve as a benchmark to track the change in these views over a range of time.

The nationally representative telephone survey of 1,202 adults was conducted by live interviewers on landlines and cell phones from January 16 to February 3, 2013. The data have been weighted by gender, age, race, education, and size of MSA to match the American adult population. Generally speaking, the margin of sampling error for the results where N = 1,202 is plus or minus 2.9 percentage points at the 95% confidence level. For smaller subgroups of the survey, the margin of error will be higher, as reflected in the table found in Appendix A. Detailed methodology, crosstab tables, and the questionnaire with response totals are appended to this report.

Reading this report

Tables and graphs included in this report highlight selected relevant survey findings and are expressed in percentages. The base for each table is all respondents unless otherwise noted. In reading the tables, when the percent sign (%) appears at the top of a column, the numbers add vertically; when % appears at the left of a row, the numbers add horizontally. An asterisk (*) indicates less than 1%; a double hyphen (--) indicates zero. Due to weighting, rounding, omission of "don't know," "refused," or other responses, percentages may add to more or less than 100%. All data reflected in the report are exclusively from the survey.

Executive Summary

The 2013 Housing and Transportation survey of 1,202 adults nationwide for the Urban Land Institute treats an array of interlocking themes about the public's satisfaction and desires for their homes, communities, and transportation. The report looks at residents' interest in compact development and at the different demands for communities and transportation by age and other variables.

Our communities: The survey reveals that nine in ten members of the American public are satisfied with their community's quality of life, and few worry that these communities are in danger of deteriorating. Indeed, groups who are least satisfied with where they currently live, such as Latinos and big-city residents, tend to be the ones who are the most optimistic and who think their communities are on the upswing.

Urban and rural: About a third of the American public lives in what they consider small towns, a third in middle-sized or big cities, 21% in suburbs, and 15% in rural areas. If given a choice, a quarter says they would like to be living in rural communities.

Our castles: Be it single-family houses, apartments, or other structures, most of us like where we live. Nine in ten Americans report satisfaction with their current residence, and four in five are happy with the range of housing choices in their communities. Even among pockets of less contentment with housing, for example among Generation Y (ages 18-34), Latinos, and big city residents, dissatisfaction does not rise to high levels.

The enduring appeal of the single-family home: Two-thirds of the American public say they live in detached single-family homes and the remainder in apartments, duplexes, row houses, and manufactured homes. Among those who believe they will move in the next five years, the appeal of the single-family home is strong, with two-thirds expecting to move into or remain in a detached single-family home.

The lure of homeownership: Seven in ten believe that buying a home is a good investment for them, even in the aftermath of the housing and mortgage difficulties the nation has witnessed in the last few years. Two-thirds of residents of the U.S. say they own their home and seven in ten renters are hopeful that within five years, they will join the ranks of homeownership.

Nation on the move: Almost one-third of Americans say they moved to a different home in the last five years – especially young people and big-city residents, as well as lower-income people, Latinos, and African Americans. Generally, movers sought bigger homes.

Two in five think they will move within the next five years – especially Generation Y and people of color. Likely movers who are Baby Boomers (ages 48-66), white, and Midwesterner would like to swell the ranks of rural residents, whereas movers among Generation Y, people of color, Westerners, and singles express a heightened interest in city living.

Commuting and driving: We are a car-dependent population. Most Americans travel by car, truck, or motorcycle nearly every day, and when the two-thirds who commute regularly go to their jobs or school, 85% travel in a car.

Travel times to work or school divide in relative thirds: fewer than fifteen minutes, fifteen minutes to half an hour, and over half an hour. Rural and suburban residents and African Americans have the longest commutes, as about half need thirty minutes or more to travel to their employment or schools.

Public transportation: Overall, one in ten commuters uses public transit to get to school or work. Reliance on buses and trains is highest among people of color and, naturally, residents of urban areas. The public that is served by buses and trains say the quality of their public transit systems is satisfactory; however, half of those who do not have access to trains and buses are discontent with the lack of public transportation.

The appeal of compact development: While much of the public expresses a desire for single-family homes and rural and small town life, there are competing pressures and needs that recommend compact development. Proximity to jobs, schools, and medical services, as well as a community's walkability, are powerful draws for many Americans.

The demand for mixed-use development may rely on two resident profiles. One is young people and college graduates who are most enthusiastic about living in centers with shops and offices nearby and second, lower-income groups who would like to live in areas with more variety in housing type and economic diversity. Both of these profiles share an interest living close to where they work or go to school. They prefer to live in areas with public transit and would choose shorter commutes with smaller homes over longer commutes and bigger houses.

Walkability: Americans place high priority on having communities that are walkable and most are already at least somewhat content with this aspect of their own communities: seven in ten say their local sidewalks and crosswalks are satisfactory. One in five walks to a destination most days, and just under half do so at least once a week.

Job market dissatisfaction: One area of some discontent with community life is the number and quality of job and career opportunities. More than two in five say this situation in their community is unsatisfactory. This a problem most acutely felt by people of color and rural residents and, to a smaller degree, Generation Y and Baby Boomers.

Generational variations: As Americans age and their incomes rise and then fall, their housing and community preferences vary. **Generation Y**, the young adults ages 18 to 34 – half of whom are people of color – shows the strongest preference for mixed-use communities and types of housing, fitting with its current urban, apartment-living lifestyle. At the same time, members of Generation Y are among the least satisfied with where they live and the most likely to be anticipating moving. They want walkable communities and use public transit more than others – although they are also very car dependent.

Having moved into the married and child-rearing mode, members of **Generation X** – ages 35 to 47 – are largely homeowners in single-family residences. While many members of Generation X are anticipating moving, they are not likely to be looking for mixed-use communities, nor to push for mass transit. This group has the largest percentages of high-income members and if they move they will be seeking to buy single-family homes.

The **Baby Boomers**, now 48 to 66 years old, are the middle ground on housing and transportation desires and behaviors, and live in all different sizes of cities and towns. They are not as likely to move soon, but when they do, the Boomers desire smaller homes with shorter commutes. This cohort, as it eases into retirement, would like to be close to parks and apart from neighbors.

Finally, our oldest generations, **War Babies**, ages 67 to 82 and the **Silent Generation** ages 83 and older, are the most likely to stay in their current homes. These older adults, who are mainly out of the workforce, are especially likely to want to be in walkable neighborhoods and close to health services, family and friends, and shopping and entertainment.

Detailed Findings

A. Americans' satisfaction with their communities and homes

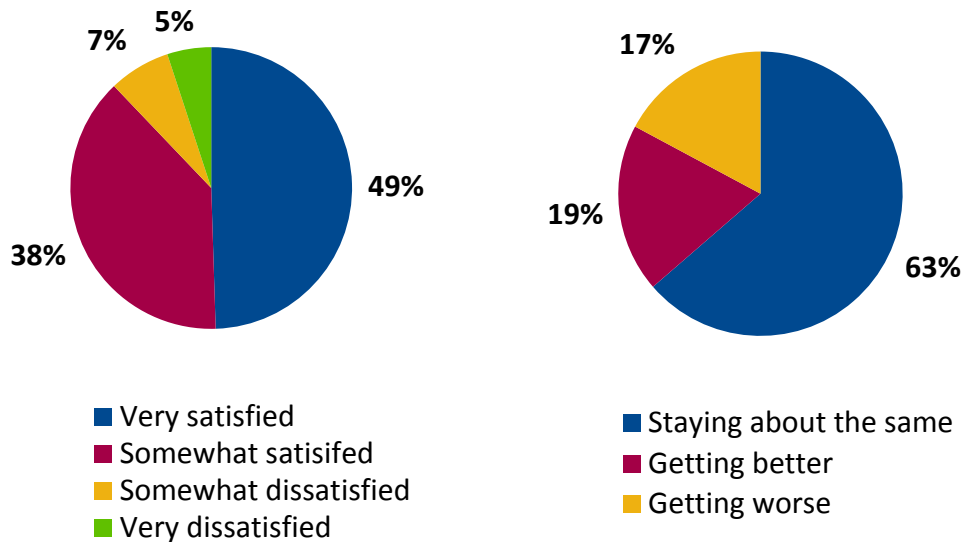
1. Positive status and outlook for community quality of life

Americans generally express high levels of contentment with the places where they currently live, with nearly nine in ten (87%) reporting satisfaction with quality of life in their community, including 49% who are very satisfied.

Most (63%) believe that the quality of life in their community is staying about the same, and one in five (19%) believe it is improving. Only 17% say they expect the quality of life to worsen in their communities.

Chart 1: Satisfaction and Expectations for Quality of Life in Community

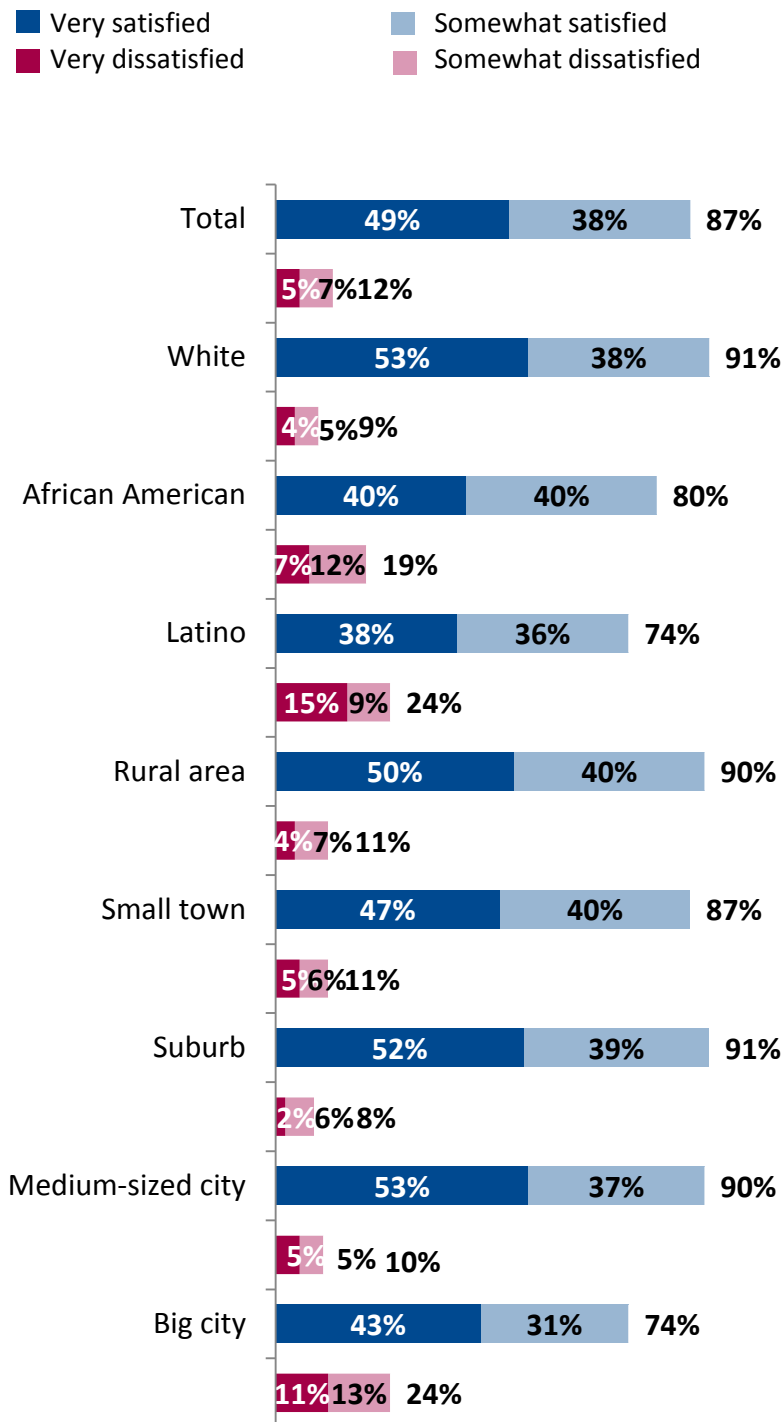
Among all adults



Q1. My first question is about the quality of life in your community. Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the quality of life in your community?
 Q2. Do you think the quality of life in your community is getting better, getting worse or staying about the same?

While majorities of all the demographic groups express satisfaction, disappointment is elevated among African Americans (19% dissatisfied), Latinos (24%), those who say they live in big cities (24%), and those with incomes under \$25,000 (21%).

Chart 2: Satisfaction with Community Quality of Life
Among all adults

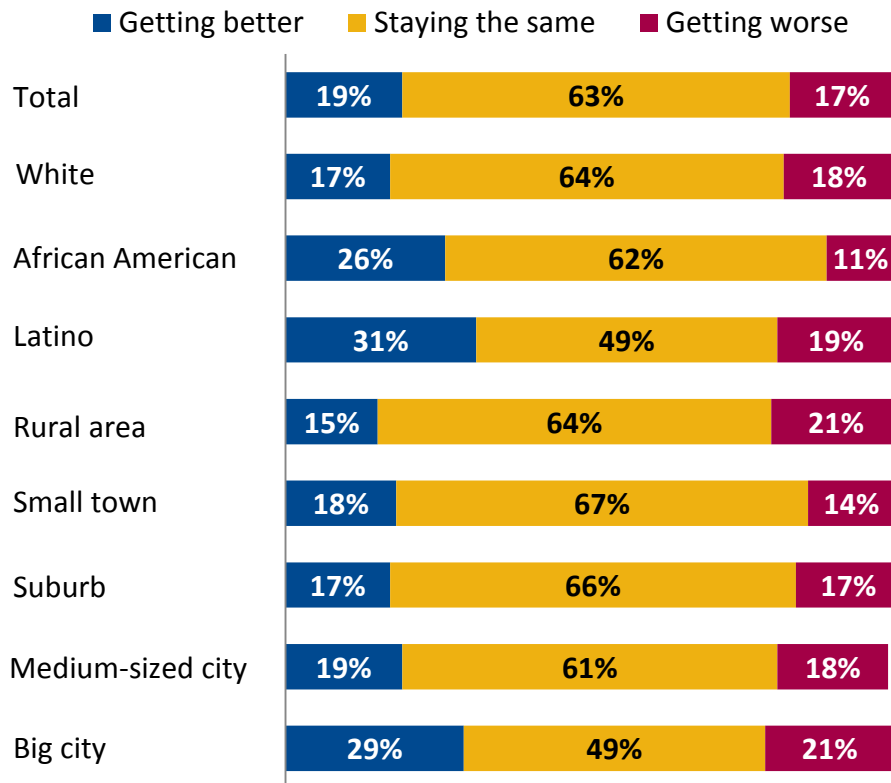


Q1. My first question is about the quality of life in your community. Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the quality of life in your community?

The groups who are the least satisfied with their quality life today are those who are also most optimistic about the future. Thirty-one percent of Latinos, 26% of African Americans, and 29% of big city residents say they believe the quality of life is getting better in their communities.

Chart 3: Direction of Quality of Life in Communities

Among all adults



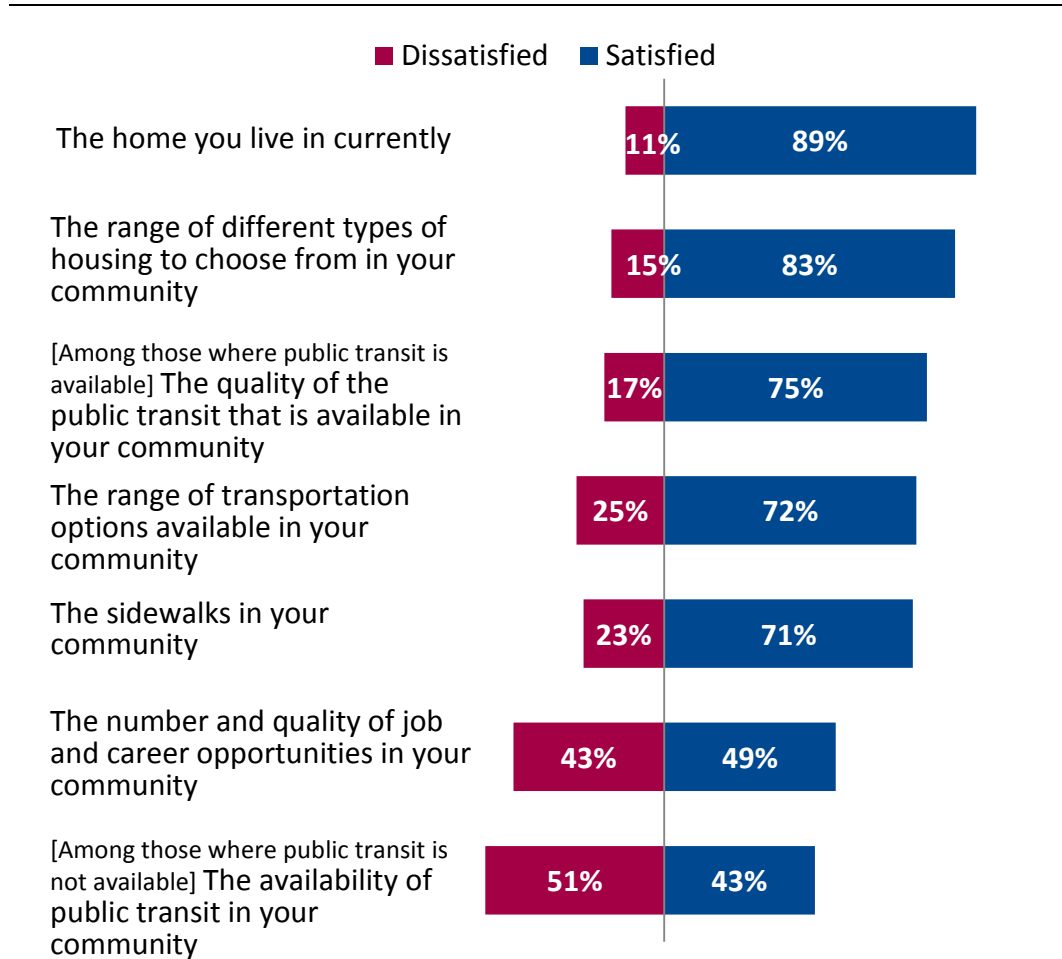
Q2. Do you think the quality of life in your community is getting better, getting worse or staying about the same?

2. Satisfaction with attributes of community life

The public’s generally positive views about their communities are reinforced by the favorable way they feel about their housing and transportation options. However, there are trouble spots where employment and public transit are lacking.

Chart 4: Community Attribute Satisfaction

Among all adults



Now I would like you to tell me how satisfied you are with each of the following: would you say you are satisfied or dissatisfied with [ITEM]? [RANDOMIZE Q21 – Q26] Q22. The home you live in currently; Q21. The range of different types of housing to choose from in your community; Q24A. [IF YES PUBLIC TRANSIT AVAILABLE IN Q15, n=855] The quality of the public transit that is available in your community; Q23. The range of transportation options available in your community; Q25. The sidewalks in your community; Q26. The number and quality of job and career opportunities in your community; Q24B. [IF NO PUBLIC TRANSIT NOT AVAILABLE, DK, REF IN Q15, n=322] The availability of public transit in your community

Homes: The overall contentment with communities is reflected in the high degree of satisfaction Americans have with their own homes and surroundings. Nine in ten (89%) report that they are satisfied with their current homes. Eighty-three percent are satisfied with the range of housing types available in their areas.

Yet, some segments of the population express less dissatisfaction. Gen Y, Latinos, renters, people living in big cities, and those who are likely to move are not as happy as their counterparts about housing. Compared to other demographic segments, these groups all register higher levels of dissatisfaction with the **range of housing options** (21% dissatisfied among Gen Y; 24% Latinos; 20% renters; 21% big city; and 21% likely movers) and with their **current home** (20% Gen Y; 23% Latinos; 22% renters; 19% big city; and 19% likely movers).

Ease of getting around – transportation and walkability in communities: Americans also largely feel satisfied with the sidewalks in their communities (71%) and the range of transportation options in the communities where they live (72%).

However, views on transportation attitudes hinge on whether communities have public transit available or not. Many of those without public transportation options in their community are not happy about it. Fully 51% of this group expresses dissatisfaction with the availability of public transportation options in their community. On the flip side, 75% of those who have public transportation available are satisfied with its quality.

Local employment opportunities: While Americans express a good deal of contentment with their housing and ways to get around, there is a strong undercurrent of unease about jobs in their communities. This dissatisfaction splits the public: 49% are satisfied, but 43% are dissatisfied with the number and quality of job and career opportunities around them. We can surmise that, no matter individuals' appreciation for their own home and community, work prospects may drive them to move and to seek homes in the places where jobs are available.

People of color and the youngest and older residents feel a lack of employment opportunities most acutely. Gen Y and Boomers (both at 46% satisfied) register less satisfaction with the job opportunities in their community as compared to Gen X (56%), reflecting perhaps the more difficult employment conditions for the youngest and oldest Americans of working age. While a small majority of whites (53%) are satisfied with the job and career opportunities in their community, majorities of African Americans (58% dissatisfied), Latinos (55%), and rural residents (56%) are not content.

B. Where we live

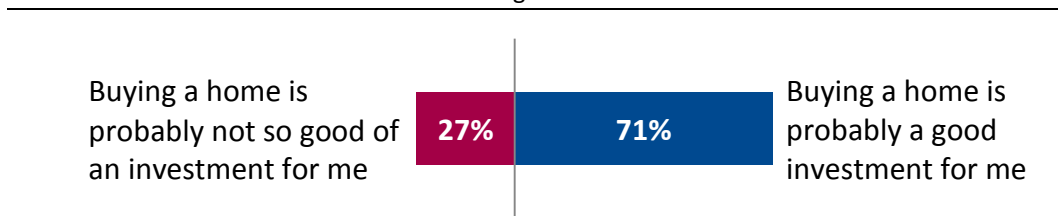
The concept of homeownership as a key element of the American Dream is alive and well, and most Americans believe homeownership is still a good investment. Two-thirds of residents of the U.S. say they currently own their own home and many others expect to join them in the next five years.

1. Beliefs about investing in a home

Despite the recent housing mortgage crisis, seven in ten Americans (71%) believe that homeownership is a good investment for them personally. Gen X (79%), higher income Americans (87%), and college graduates (80%) are especially likely to say that buying real estate would be a smart move.

Chart 5: Buying Homes as an Investment

Among all adults



Which of these pairs of statements do you agree with more Q37. [Buying a home is probably a good investment for me] OR [buying a home is probably not so good of an investment for me].

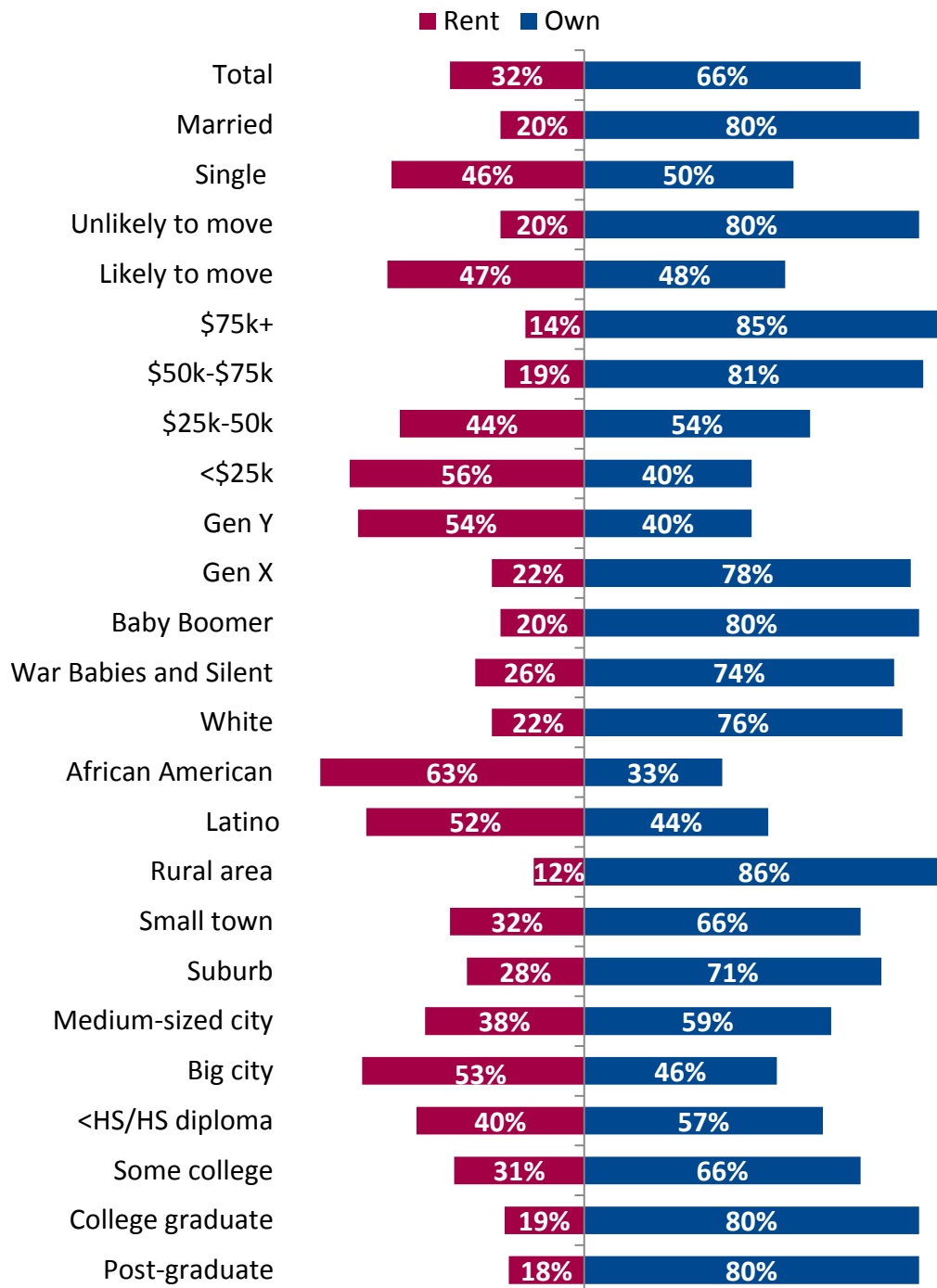
2. Patterns of owning and renting

According to our survey results, housing in the U.S. is dominated by homeowners, with 66% owning their home and 32% renting. Ownership is highest among people who are 35 and older (78% Gen X, 80% Boomers, and 74% War Babies and Silent Generation), white (76%), and rural residents (86%), as well as those who have incomes of \$50,000 to \$75,000 (81%) or above \$75,000 (85%) and higher education levels (80% for both those with bachelor's and post-graduate degrees).

On the other hand, renting is dominant among Generation Y (54%), African Americans (63%), Latinos (52%), and big city residents (53%).

Chart 6: Renting and Owning Homes

Among all adults

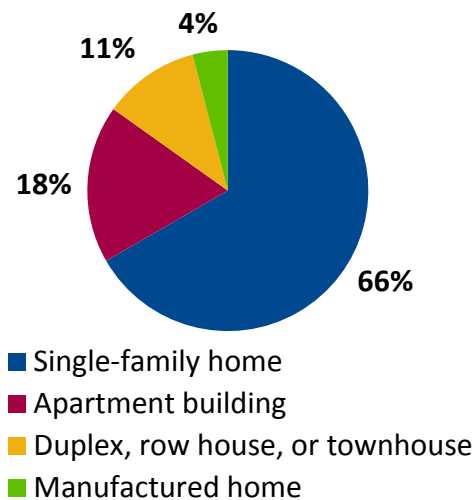


Q6. Do you own or rent your primary residence?

3. Housing type

Two-thirds (66%) report living in single-family, detached houses, nearly one in five resides in apartment buildings (18%), and 15% live in other types of dwellings including duplexes, row houses, townhouses, or manufactured homes.

Chart 7: Current Housing Type
Among all adults



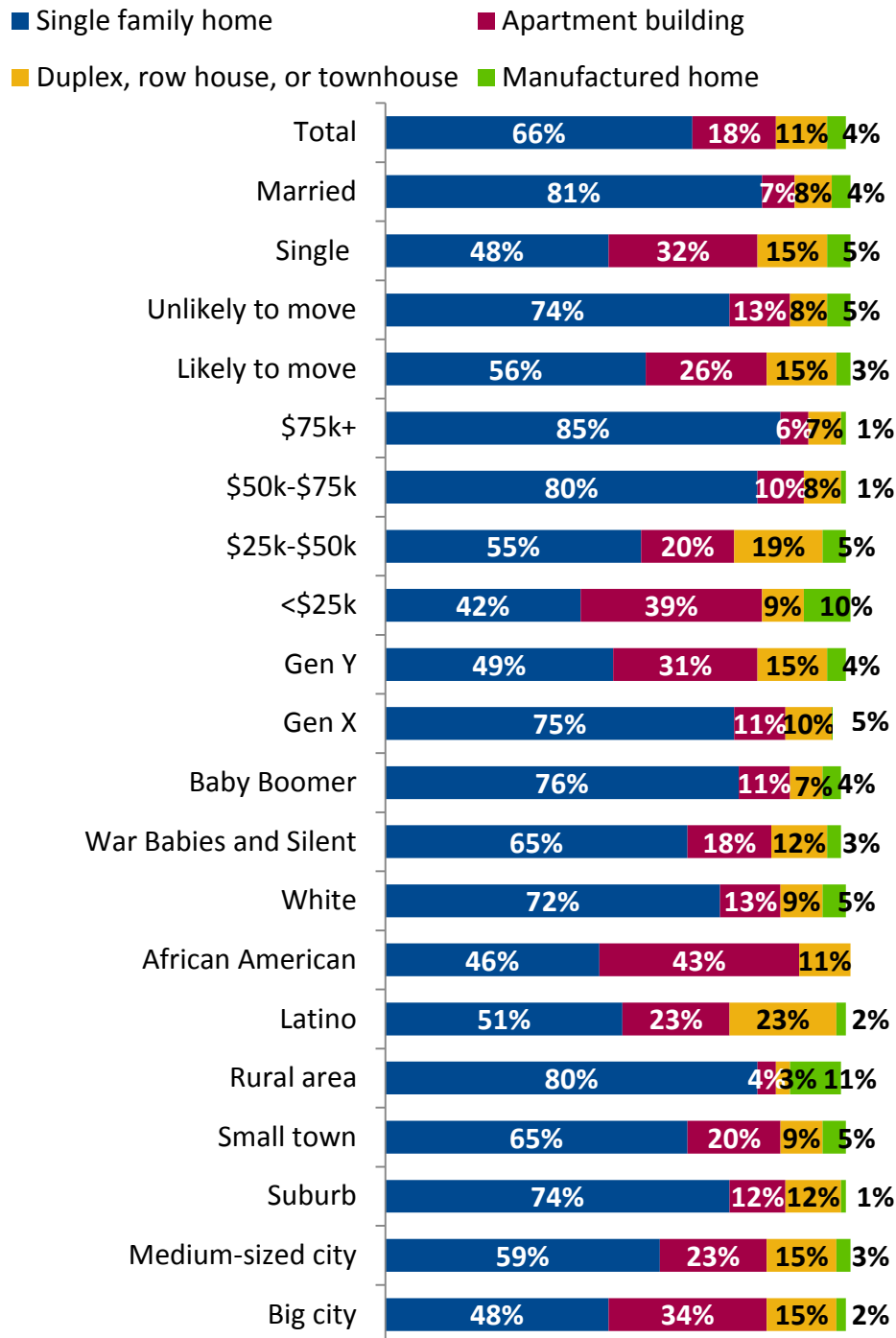
Q5. Now I have some questions about your home that is your primary residence. Do you currently live in an apartment building; a duplex; a row house or townhouse; a single-family detached home; a manufactured or mobile home; or something else?

Housing is closely related to the size of the community in which people live. For example, 34% of big city residents live in apartment buildings versus four percent of rural Americans. Only 48% of big city residents are in single-family, detached homes compared to 74% of suburbanites and 65% of rural residents.

Living in a single-family house is not only related to size of community, but also to their stage in life. It is a goal that Americans move closer to as they age, marry, and earn more. Fully eight in ten married people, more than eight in ten with incomes of \$50,000 or more, and more than seven in ten of Generation X and Baby Boomers have achieved that status. On the other hand, half of people of color, singles, and Gen Y live in apartments, row and townhouses, and duplexes.

Chart 8: Type of Current Residence

Among all adults



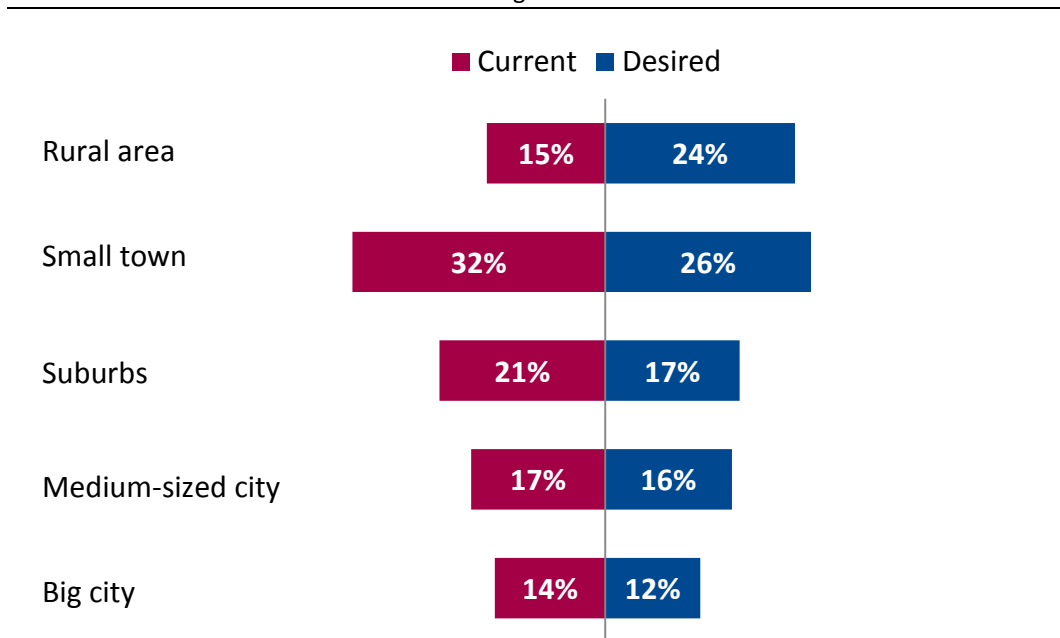
Q5. Now I have some questions about your home that is your primary residence. Do you currently live in an apartment building; a duplex; a row house or townhouse; a single-family, detached home; a manufactured or mobile home; or something else? [SOMETHING ELSE] What is that? [IF RESPONDENT SAYS CONDO OR CO-OP FOLLOW-UP WITH] Is that an apartment building, duplex, or townhouse?

4. Urban and rural

Much of the American public prefers a small town or rural lifestyle and nearly half describe the place they now live as such (32% small town, 15% rural area). If people could live where they wanted in the next five years, half would live in either a small town (26%) or a rural area (24%). Suburbs appeal to 17% of the population, medium-sized cities to 16%, and big cities to 12%.

Chart 9: Community Size: Current and Desired

Among all adults



Q3. Would you describe where you live as being a rural area, a small town, a medium-sized city, a big city, a suburb near a city, or something else? [SOMETHING ELSE] What is that? Q4. If you could live any place in the next five years, would it be a rural area, a small town, a medium-sized city, a big city, a suburb near a city, or something else? [SOMETHING ELSE] What is that?

Seventy percent of rural residents would choose to stay there in the future, compared to a tiny three percent of rural residents who would rather live in a big city. In contrast, only 36% of big city residents would choose to live in a big city in the future; 18% see themselves in a rural area and 17% in a suburb.

Gen Y shows the strongest preference for the city lights: 40% would pick a big or medium-sized city in five years, whereas Baby Boomers lean toward rural areas (30%) and small towns (29%). However, the oldest cohorts, people over 67, are notably **not** interested in living back on the farm (only 16% would choose rural areas).

African Americans and Latinos say they would prefer big cities (20% and 26%, respectively) and suburbs (27% and 20%, respectively) in higher than average numbers. While people in the Midwest and the South Atlantic lean toward a preference for a rural lifestyle (31% and 30%, respectively), Westerners are more interested in medium-sized cities (25%) than Americans overall.

C. What Americans desire in their communities

1. Importance of community characteristics

We often hear that safety and high-quality schools are the basic criteria for Americans when they seek a place to live, whether they are single, raising families, or retiring. Regardless of one's stage in life, the research confirms feeling safe in one's home and neighborhood is naturally a top requirement. On the other hand, the survey reveals that while the quality of public education in a community is an important factor for many, it gets strong competition from other characteristics as people move out of their child-rearing years.

We presented respondents in the survey with a series of community characteristics and asked them to rate these aspects on a scale of one to ten, where one indicated that the attribute would be extremely unimportant to them and ten indicated an attribute would be extremely important to them in choosing their next community or staying in their current one.

To clarify the relative importance of the attributes, we collapsed the scoring into low (1 to 5) and high (6 to 10) ratings and subtracted the low from the high. The differentials between the 6 to 10 high scores and the 1 to 5 low scores for each of the community characteristics show distinctions in relative importance to the public. Thus, the higher the + score associated with a characteristic, the more common it is to be important to people in thinking about where they would like to live.

Overall, the safety of a neighborhood and the quality of public schools top the list, as one would expect. In addition, high on the list are privacy and practical considerations. After safety (+84 percentage point differential) and schools (+59), the next most important aspects are these:

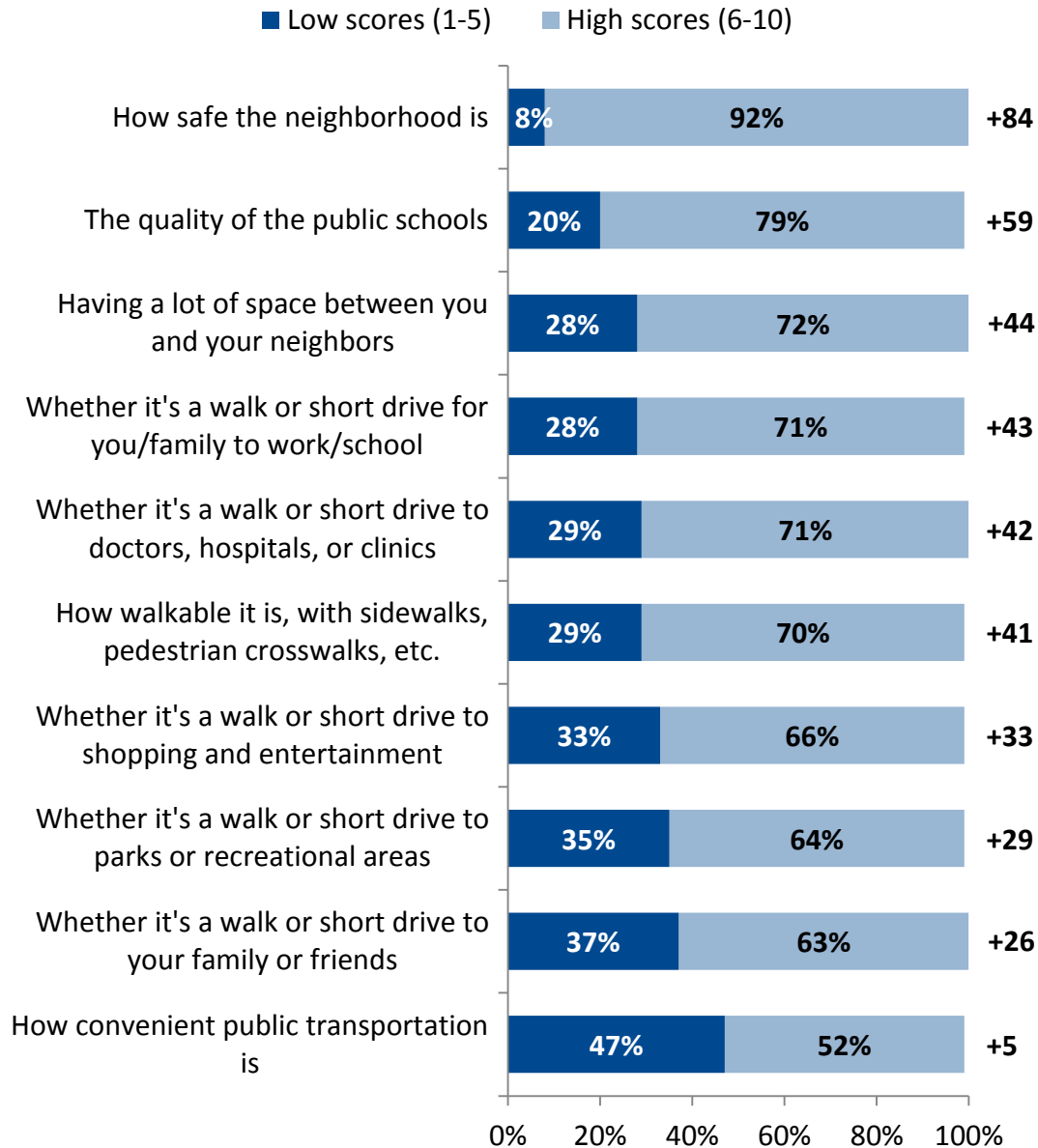
- Desire for plenty of space between neighbors (+44 percentage point differential);
- Proximity to work and school (+43);
- Proximity to medical facilities (+42); and
- The walkability of a community via sidewalks, crosswalks, *etc.* (+41).

Lower differential scores include the proximity to other amenities and people:

- Proximity to shopping and entertainment (+33);
- Proximity to parks and recreation (+29);
- Having family and friends within a short walk or drive (+26); and
- The convenience of public transportation (+5).

Chart 10: Importance of Community Characteristics

Among all adults



Let's assume for a minute that you were deciding to stay where you are or to move somewhere else in the next five years. I am going to read some characteristics that you would look for in a neighborhood or community. I would like you to rate each on a scale where ten means something would be extremely important and one means it would be completely unimportant to you personally in deciding where to live. How would you rate [ITEM] on the one to ten scale? Q34. How safe the neighborhood is; Q35. The quality of the local public schools; Q36. Having a lot of space between you and your neighbors; Q29. Whether it's a walk or short drive for you or your family to work or to school; Q30. Whether it's a walk or a short drive to doctors, hospitals or clinics you use or might need; Q28. How walkable it is, with sidewalks, pedestrian crosswalks, etc.; Q32. Whether it's a walk or a short drive to shopping and entertainment; Q33. Whether it's a walk or short drive to your family or friends; Q31. Whether it's a walk or a short drive to parks or recreational areas; Q27. How convenient public transportation is

*Scores derived by subtracting low scores (1-5) from high scores (6-10)

Quality of schools: While neighborhood safety is of the utmost importance to people of all generations, other community characteristics appeal to some groups more than others. For example, the quality of the public schools in the area is very important to people in the child-rearing years, such as Generation Y (+74) and X (+65), as well as African Americans (+83) and Latinos (+72).

Space vs. proximity to work and school: Having a lot of space between homes is particularly important to those who own their homes (+50), while those in Gen Y and African Americans feel it is important to be close to their work and schools (+64 and +62, respectively).

Health services: Proximity to doctors, hospitals, and clinics is particularly important for the War Babies and Silent Generations (+57), African Americans (+64), and Latinos (+64). For the older generations, this makes the convenience of medical services (+57) of higher importance than schools (+42). For Boomers, it is a close call (+49 schools, +44 doctors, *etc.*).

Walkability: African Americans (+74) and Latinos (+58), as well as those in medium-sized cities (+62), also place a relatively high priority on living in walkable communities.

Proximity to other amenities and people: African Americans (+64), followed by Gen Y (+42) and those in the Silent and War Babies generations (+39) are more likely to score being close to shopping and entertainment highly. Interestingly, the size of community in which people live has little bearing on their desire to live near parks or recreational areas (+38 medium-sized city, +41 big city, +40 suburbs). Notably, only Latinos (+54) rate proximity to their friends and family highly.

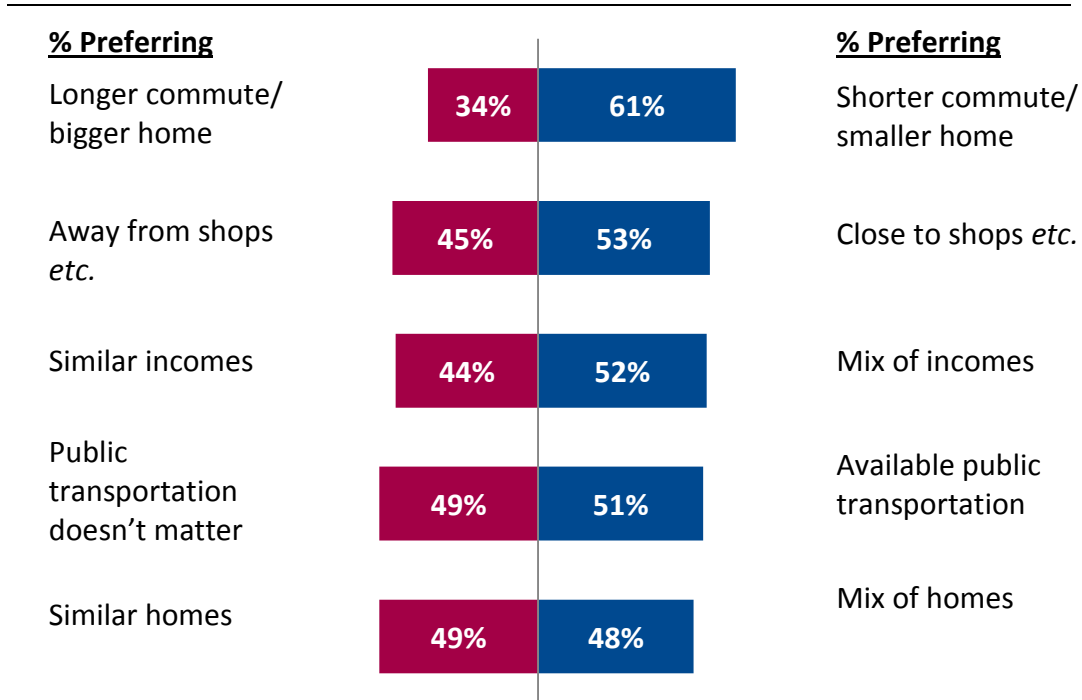
Public transit: Finally, the convenience of public transportation is very important to African Americans (+58), those who live in a big city (+48), Latinos (+46), renters (+35), and those who make less than \$25,000 a year (+35).

2. Who appreciates compact communities?

So far, we have painted a portrait of a country that prefers detached homes and space. Nevertheless, the survey finds that when we parse them out in a series of five trade-offs, there are aspects of smart growth and compact development that appeal to a large number of Americans. Indeed, the American public is divided when it comes to the mix of housing and community types they prefer.

Chart 11: Community Attribute Tradeoffs

Among all adults



Which of these pairs of statements do you agree with more? Q41. [I would be willing to commute for more than 45 minutes if it meant I could live in a bigger home] OR [I would prefer a shorter commute even if it meant living in a smaller home]; Q42. [I would prefer to live in a neighborhood close to a mix of shops, restaurants, and offices] OR [I would prefer to live away from shops, restaurants, and offices]; Q39. [I would rather live in a community where people have a mix of incomes] OR [I would rather live in a community where most people have similar incomes]; Q38. [I prefer to live in a community that has public transportation options I can use] OR [the public transportation options in a community don't matter to me]; Q40. [I would rather live in a community where the types of homes are similar] OR [I would rather live in a community where there is a mix of apartments, town houses, and single family homes]

Commute vs. home size: A majority of Americans reports a preference for a shorter commute and a smaller home (61%) versus a longer commute and a bigger home (34%). The only group in which a majority would trade off a longer commute for a bigger home is African Americans (52% bigger home, 44% shorter commute), but Latinos are not far behind (48% bigger home, 52% shorter commute). The enthusiasm for smaller homes with less commuting is driven by Boomers (72%), the Silent Generation and War Babies (65%), and those with a post-graduate degree (70%).

Mixed-use communities: Slightly more Americans prefer a home close to commercial activity such as a mix of shops, restaurants, and offices (53%) rather than away from it (45%). Those who are most likely to want to live in such mixed-use communities include African Americans (75%), Gen Y (62%), single people (60%), renters (60%), and college graduates (60%).

Unsurprisingly, those who describe their communities as rural overwhelmingly prefer to live away from shops, restaurants, and offices (72%).

Mix of incomes: A small majority would prefer to live in a community of mixed incomes (52%), while 44% would choose an area with similar incomes. These results are consistent across nearly all demographic groups. One exception is African Americans, who strongly favor a mixed-income community (63%).

Public transportation: Americans are split about the importance of public transit in their communities: 51% prefer to live in a community with options and 49% say it does not matter to them. Gen Y (55%), women (53%), African Americans (77%), Latinos (63%), low-income Americans (63%), and post graduates (60%) would prefer to live in communities with public transportation options. Those who feel public transportation does not matter include Gen X (55%), men (52%), whites (56%), and high-income Americans (60% among those with household incomes over \$75,000).

Diversity of housing type: Preference for a variety of types of homes in a community is evenly divided between those who prefer similar structures (49%) and those who prefer their community be comprised of different types of homes (48%). Residents of South Atlantic (60% similar) and South Central states (61%) are considerably more enthusiastic about living in areas where the housing is similar. Also, Boomers (55%) and high-income Americans (57%) prefer living in communities with similar housing.

Conversely, the groups who lean toward a preference for a diversity in type of housing include Gen Y (59% mix), singles (58%), people with income under \$25,000 (59%), and residents of the Northeast (59%) and West (56%).

D. Who is on the move and where do they think they will go?

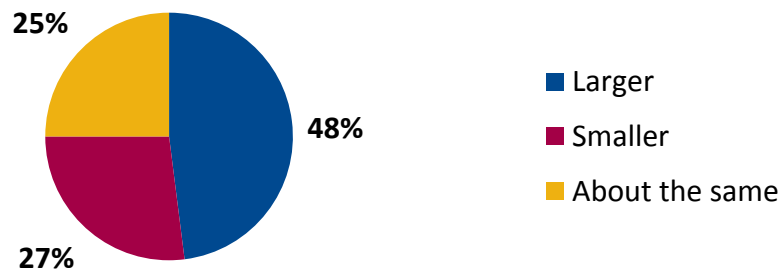
1. Who has moved?

Nearly a third of Americans (32%) report moving in the past five years. Changing residence is most common among Gen Y (53%), big-city dwellers (50%), African Americans (44%), Latinos (45%), those with lower incomes (42%), and single people (37%).

About half (48%) of people who have recently moved report upgrading to a larger home than they had lived in before, while 27% moved into smaller, and 25% into homes of about the same size. In particular, members of Gen X (59%) are more likely to be upgrading from smaller dwellings to larger ones.

Chart 12: House Size of Most Recent Move Compared to Former Residence

Among those who have moved in the past five years



Q11. [IF INDICATED HAVING MOVED IN PAST FIVE YEARS IN Q10, n=356] Thinking about your most recent move, did you move to a home that was larger, smaller, or about the same size as your previous home?

2. Who plans to move?

More Americans say they plan to move in the next five years (42%) than tell us they have moved in the past five (32%). Likely movers include large numbers of those in Generation Y (63%), African Americans (63%), Latinos (54%), big city residents (56%), and those with incomes under \$25,000 (51%).

Likely movers' views on home ownership mirror the overall national sentiment, as 73% believe home ownership is a good investment.

3. What types of homes do movers expect?

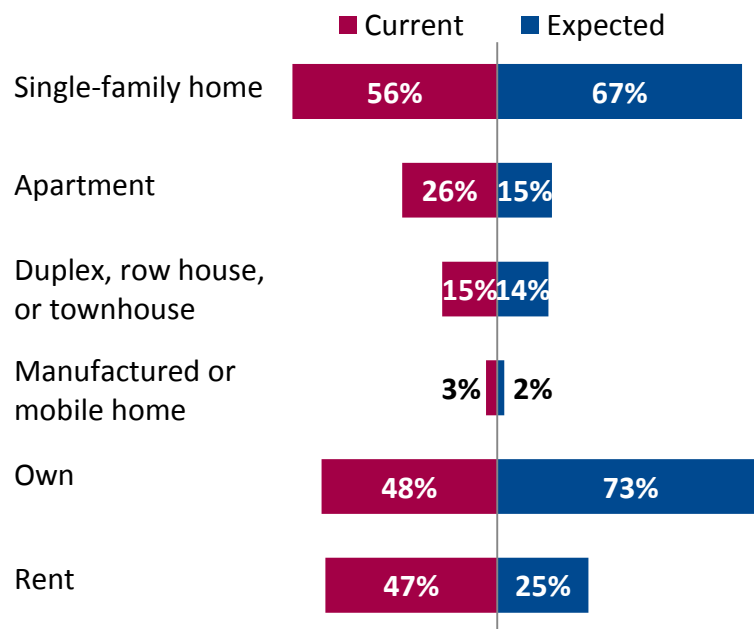
Fifty-six percent of likely movers currently live in single-family homes, but 67% of them expect to move into a house of this type within five years. Only 15% expect to be in apartments although 26% of movers live in them now. However, the duplex and row house share of the market do not appear to change (15% now, 14% anticipated in five years).

In addition, three times as many of those who are likely to move would like to purchase a home (73%) rather than rent (25%).

The demand for multi-family housing will be driven mainly by young, single Americans who have yet to earn high incomes. Twenty-one percent of Gen Y, 25% of single people, and 24% of those making under \$25,000 indicate they are headed for apartment living. Further, 17% of Gen Y, singles, and the lowest income group say they expect to be in duplexes, row houses, or townhouses in five years. Thus, the figures all add up to about four in ten in these groups expect to be living in compact housing.

Chart 13: Housing Type and Ownership Among the Expectant Movers

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



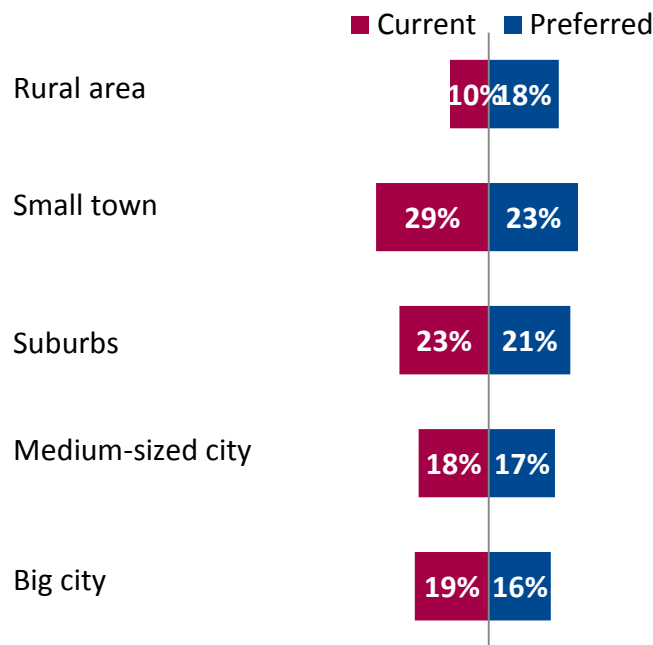
Q5. Do you currently live in an apartment building; a duplex; a row house or townhouse; a single-family, detached home; a manufactured or mobile home; or something else? Q8. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=496] In five years, what type of home do you expect to live in? An apartment building; a duplex; a row house or townhouse; a single-family, detached house; a manufactured or mobile home; or something else? Q6. Do you own or rent your primary residence? Q9. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=496] In five years, do you expect to own or rent your primary residence?

4. Where will movers go?

We have seen that many Americans would like to live in rural areas and small towns. Indeed, 18% of likely movers say they would like to move to a rural area, compared to 10% who live there now. However, if people get their wish, small towns would not see this growth in new movers since only 23% of those likely to move say they would prefer a small town, compared to 29% who already live there.

Breaking down where the likely movers would like to live by demographic group, Baby Boomers (25%), white Americans (24%), and Midwesterners (27%) are the most likely to want to live in rural areas. Westerners would prefer medium-sized cities (27%) and Gen Y (21%), singles (22%), African Americans (24%), Latinos (22%), and men (21%) express a higher than average desire for the big city life.

Chart 14: Current and Desired Community Size Among the Expectant Movers
 Among those very or somewhat likely to move in the next five years



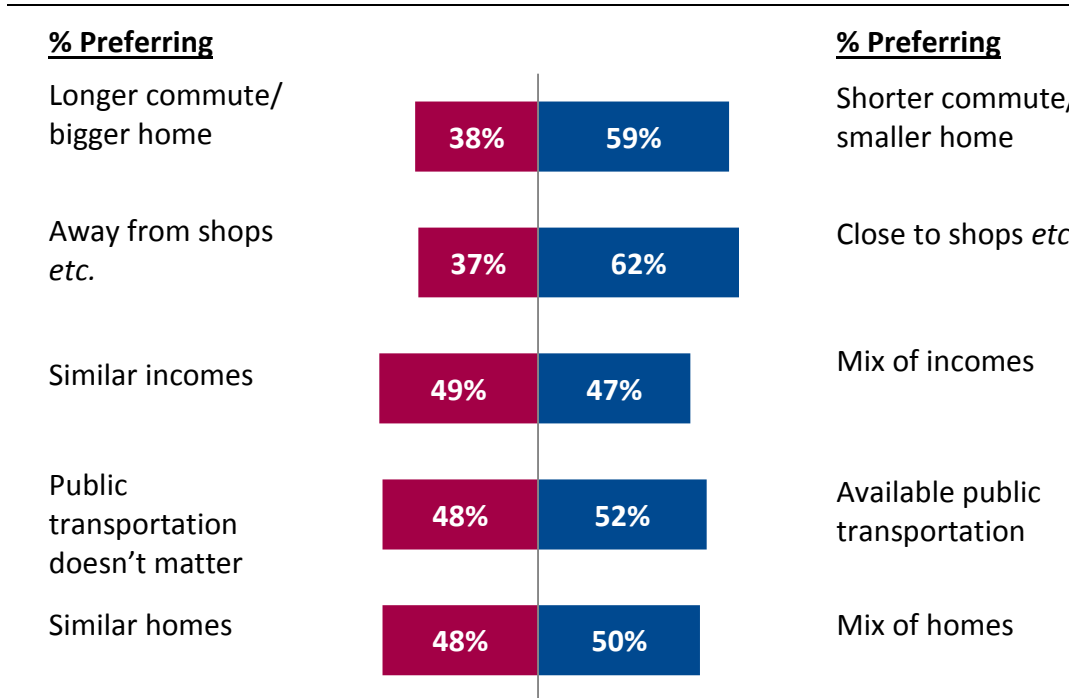
Q3. Would you describe where you live as being a rural area, a small town, a medium-sized city, a big city, a suburb near a city, or something else? Q4. If you could live any place in the next five years, would it be a rural area, a small town, a medium-sized city, a big city, a suburb near a city, or something else?

5. Movers and compact communities

Likely movers express a clear preference for mixed-use communities (62% prefer to live close to a mix of shops, restaurants, and offices) and smaller homes with short commutes (59%). However, their opinions are much more in line with non-movers and divided on the questions of communities with a mixture of different housing types (50% different housing types, 48% similar) and different income levels (47% mix of incomes, 49% similar). As we noted on the previous page, likely movers have a strong preference for single-family homes for themselves.

Chart 15: Community Attribute Tradeoffs Among the Expectant Movers

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



Which of these pairs of statements do you agree with more? [n=496] Q41. [I would be willing to commute for more than 45 minutes if it meant I could live in a bigger home] OR [I would prefer a shorter commute even if it meant living in a smaller home]; Q42. [I would prefer to live in a neighborhood close to a mix of shops, restaurants, and offices] OR [I would prefer to live away from shops, restaurants, and offices]; Q39. [I would rather live in a community where people have a mix of incomes] OR [I would rather live in a community where most people have similar incomes]; Q38. [I prefer to live in a community that has public transportation options I can use] OR [the public transportation options in a community don't matter to me]; Q40. [I would rather live in a community where the types of homes are similar] OR [I would rather live in a community where there is a mix of apartments, town houses, and single family homes]

Although living in a community with convenient public transportation is not as high a priority for movers as are the characteristics just mentioned, half of movers (52%) would prefer to live in a community with public transportation and half (48%) say it is unimportant to them -- a

distribution that is similar to views among the public at large. Among those likely to move, 15% say they take public transit on most days to get to work or school, as compared to only six percent of the all commuters. Movers' appreciation for public transportation is coupled with their preference for a shorter commute, even if it means living in a smaller house.

E. Getting to home, work, and school

1. Transportation modes

Most Americans travel in their cars nearly every day, but a good number use their feet to get where they need to go, and a small minority uses public transit regularly.

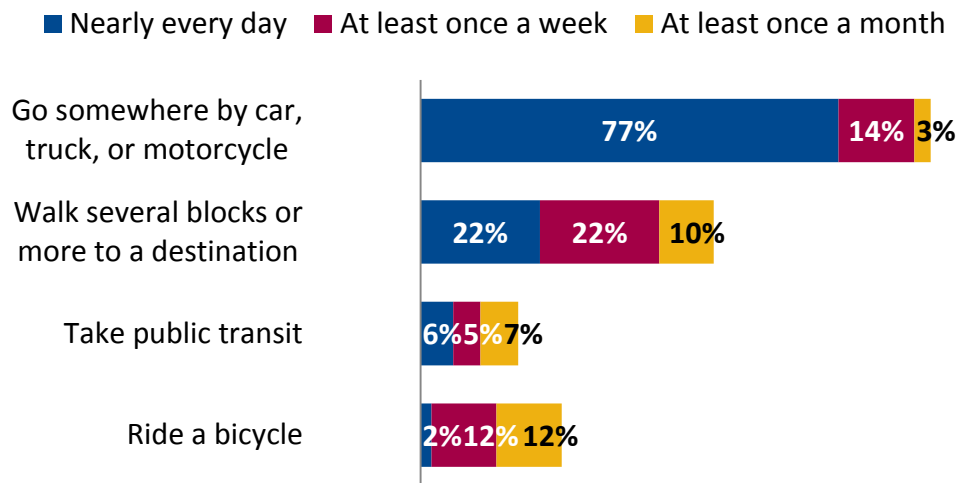
Motor vehicles: Seventy-seven percent of the American public ride in a car, truck, or motorcycle most days. Dependence on a motor vehicle is highest in the Western states (81% use one nearly every day) and among homeowners (83%), suburbanites (87%), Gen X (89%), and, especially, people with incomes over \$75,000 (93%).

Biking: Cycling is a near-daily occurrence for only two percent, but another 12% ride a bike one once a week or so and 12% do so at least once a month – making for a total of 26% who pedal during a month. Men (20%) are about twice as likely as women (9%) to bike at least once a week. Biking is most common in the West (20% at least once a week) and among Latinos (27%).

Public transit: Overall, six percent of Americans use public buses and trains nearly every day, while twice that report using it once a month or more (5% once a week, 7% once a month). Big city dwellers (19%) and people of color (18% of African Americans, 14% of Latinos) are more likely to use public buses and trains nearly every day than are other groups.

On foot: Many Americans are also frequent walkers. More than two in ten (22%) report walking to a destination nearly every day. An additional 22% walk to a destination at least once a week – for a total of 44% who walk to a destination at least once a week. Walking to a destination is part of big-city life: four in ten big city residents (39%) walk somewhere nearly every day and another 20% do so at least once a week.

Chart 16: Frequency of Using Modes Transportation
Among all adults



Please tell me how often you do each of the following: nearly every day; at least once a week; at least once a month; less often than that, or never? [RANDOMIZE Q16-Q19] Q18. Go somewhere by car, truck, or motorcycle; Q16. Walk several blocks or more to a destination; Q19. Take public transit; Q17. Ride a bicycle

2. Commuting to work and school

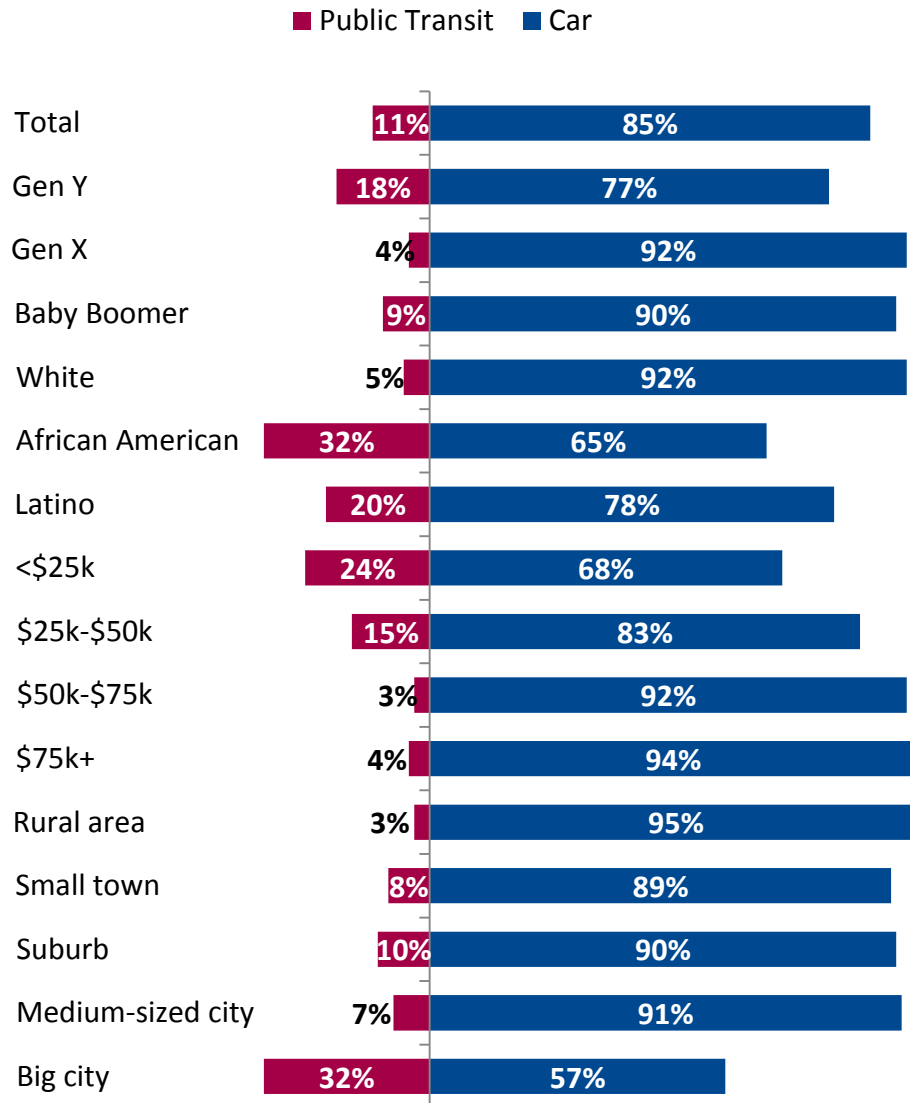
Two-thirds (63%) of the public commute to work or school three or more days each week.

Transit use and non-use: Among commuters, traveling by car is the most common way of getting to work or school: 85% use a car, 11% board public transit, and five percent walk or bike.

The use of buses, trains, or other means of transit varies greatly and is driven by economics and urban living. While only 11% of all commuters use public transit, 32% of those living in big cities rely on it. A full third (32%) of African-American and 20% of Latino commuters are using public transit to get to their jobs and classes. Twenty-four percent of commuters who make less than \$25,000 also travel on buses and trains. Gen Y commuters (18%) use public transit more than any other generation.

Chart 17: Commuting Modes

Among those who commute three or more days a week to work or school



Q20A. [IF YES COMMUTE THREE OR MORE DAYS A WEEK IN Q20, n=704]: On most days, do you go by car, take public transit, or travel another way to work or school? [LIST PRE-CODED, DO NOT READ; READ IF RESPONDENT NEEDS PROMPTING] [MULTIPLE RESPONSE]

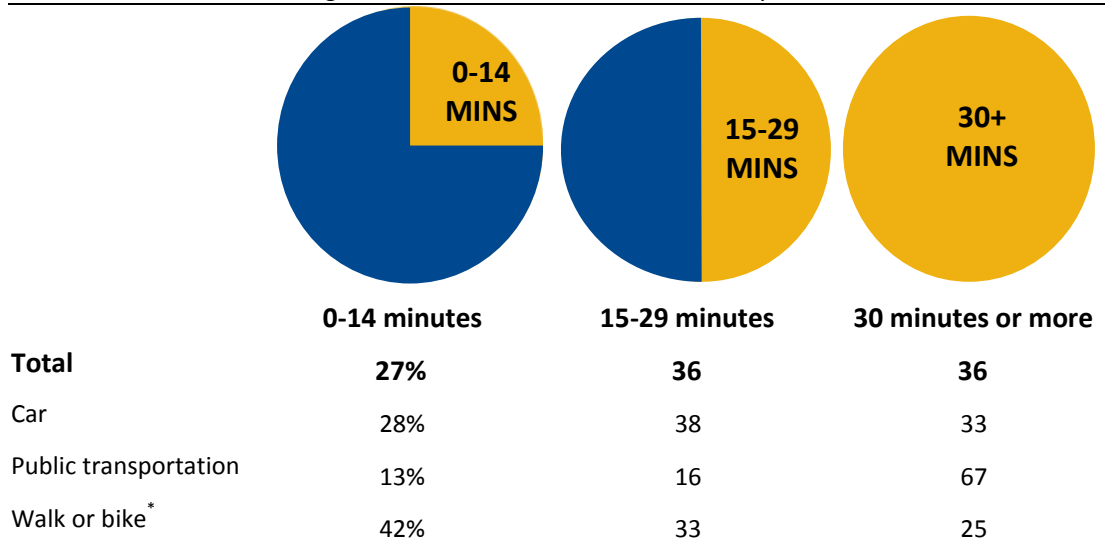
Length of time on the road: Twenty-seven percent of commuters take less than fifteen minutes to get to work or school, another third (36%) needs between a quarter and half an hour, and 36% take longer (20% a half an hour to forty-five minutes and 16% forty-five minutes or more).

Public transit users have the longest commute times: 67% have a commute longer than thirty minutes, whereas most of those who take cars, trucks, or motorcycles do so in under thirty

minutes. Walkers and bikers take the shortest amount of time: 42% have a trip of under fifteen minutes.

Chart 18: Commuting Times and Mode of Transportation to Work or School

Among those who commute three or more days a week



Q20B. [IF YES COMMUTE THREE OR MORE DAYS A WEEK IN Q20, n=704]: How long does it take you to travel to work or school? [RECORD MINUTES ALLOW THREE DIGITS]

Satisfaction with status quo: The public is generally satisfied with the range of transportation options. Seventy-two percent of Americans say the range of transportation options in their community is satisfactory, but 25% say they are dissatisfied with the offerings.

Among those who say their community is served by public transit, 75% say they are satisfied with its **quality**. There are only slight differences across demographic groups, with Midwesterners being the most likely to express satisfaction (82%) and South Atlantic residents the least likely (70%).

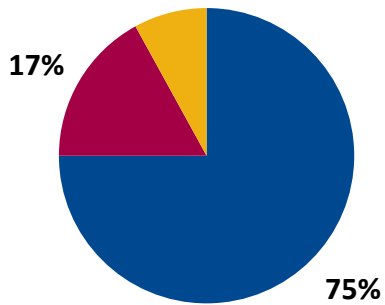
A much less favorable picture emerges from residents who are denied access to mass transit because their area does not offer it. Half (51%) of this population says they are dissatisfied with the lack of **availability**. This lack of transit is most unsatisfactory for single people (60%), renters (73%), and, interestingly, those with post-graduate educations (69%).

* The n for walk or bike among commuters is only 38, so interpretation is limited. These data are included, nevertheless, for possible future reference.

Chart 19: Satisfaction with Public Transportation

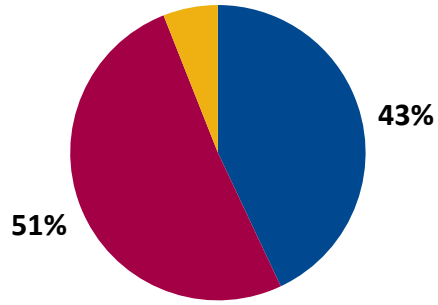
Among adults with and without access to public transit

Among those where public transportation is available
8%



- Satisfied
- Dissatisfied
- DK/REF

Among those where public transportation is not available
6%



- Satisfied
- Dissatisfied
- DK/REF

Now I would like you to tell me how satisfied you are with each of the following: would you say you are satisfied or dissatisfied with [ITEM]? Q24A. [IF YES PUBLIC TRANSIT AVAILABLE IN Q15, n=855] The quality of the public transit that is available in your community; Q24B. [IF NO PUBLIC TRANSIT NOT AVAILABLE, DK, REF IN Q15, n=322] The availability of public transit in your community

F. Key groups

1. Generations

The 2013 ULI Survey on Housing and Transportation describes the desires and choices Americans are making about our homes and the types of communities we live in. The survey results reflect the needs and decisions made by individuals and their family members, from one generation to the next, and looking at the survey findings by generation helps place Americans' decisions on housing, communities, and transportation in context.

The analysis that follows draws from the results reported in the prior sections and provides a thumbnail sketch of how each generation feels about its communities and hopes for the future, starting with the youngest adults.

Generation Y (30%): Generation Y, also known as Millennials, includes the youngest adults, those now between the ages of 18 and 34. They are coming of age at the beginning of the 21st century and stand out as the most urban, multicultural, and transient generation. Four in ten (40%) of this younger generation are either Latino or African American and 56% are living with children under 18.

Their relatively low levels of education and income speak to their age, the fact that they are the fact they are just starting their careers, and, for many in Gen Y, their hardscrabble, urban-living. Members of Gen Y are the most likely to live in rental housing (54%) and in cities (39%). They are clearly on the move and so far are less settled than members of earlier generations. More of Gen Y than any other generation has moved residences in the last five years (53%) and expect to move again within the next five years (63%). While just over half (54%) live in rental housing now, seven in ten of those who expect to move are also anticipating that they will own a home in five years (69%).

When thinking about the types of communities where they would like to live, Gen Y is more likely than older Americans to prefer living in a big city, and shows the strongest preference among the generations for communities with a mix of uses, with shops, offices, and housing together (62%), as well as a mixture of different types of housing, such as detached homes, apartments, and row or townhouses (59%).

Gen Y is the generation most eager to live in a place with a number of public transportation options (55% say this matters to them), likely because more of them use it to get to work and home than any other generation. More than four in five of those in Gen Y (81%) say they live where there is public transportation, and among those who commute to work or school, 18%

use it on a regular basis, considerably more than the older cohorts. Nevertheless, 77% of Gen Y commuters say they usually drive to their employment or school.

Generation Y, like the Baby Boomers, walk more than the other generations. Nearly one in four people in Gen Y (23%) report walking several blocks to a destination nearly every day. Of all age groups, they care the most about whether or not they live in walkable communities with sidewalks (+41 differential).

In short, Generation Y places a priority on living in diverse communities with many different housing options in an urban environment. Even if they will likely choose not to use it often, they want to have public transportation as an option and value its presence in their neighborhoods.

Chart 20: Generation Y Demographics

Among all those ages 18-34

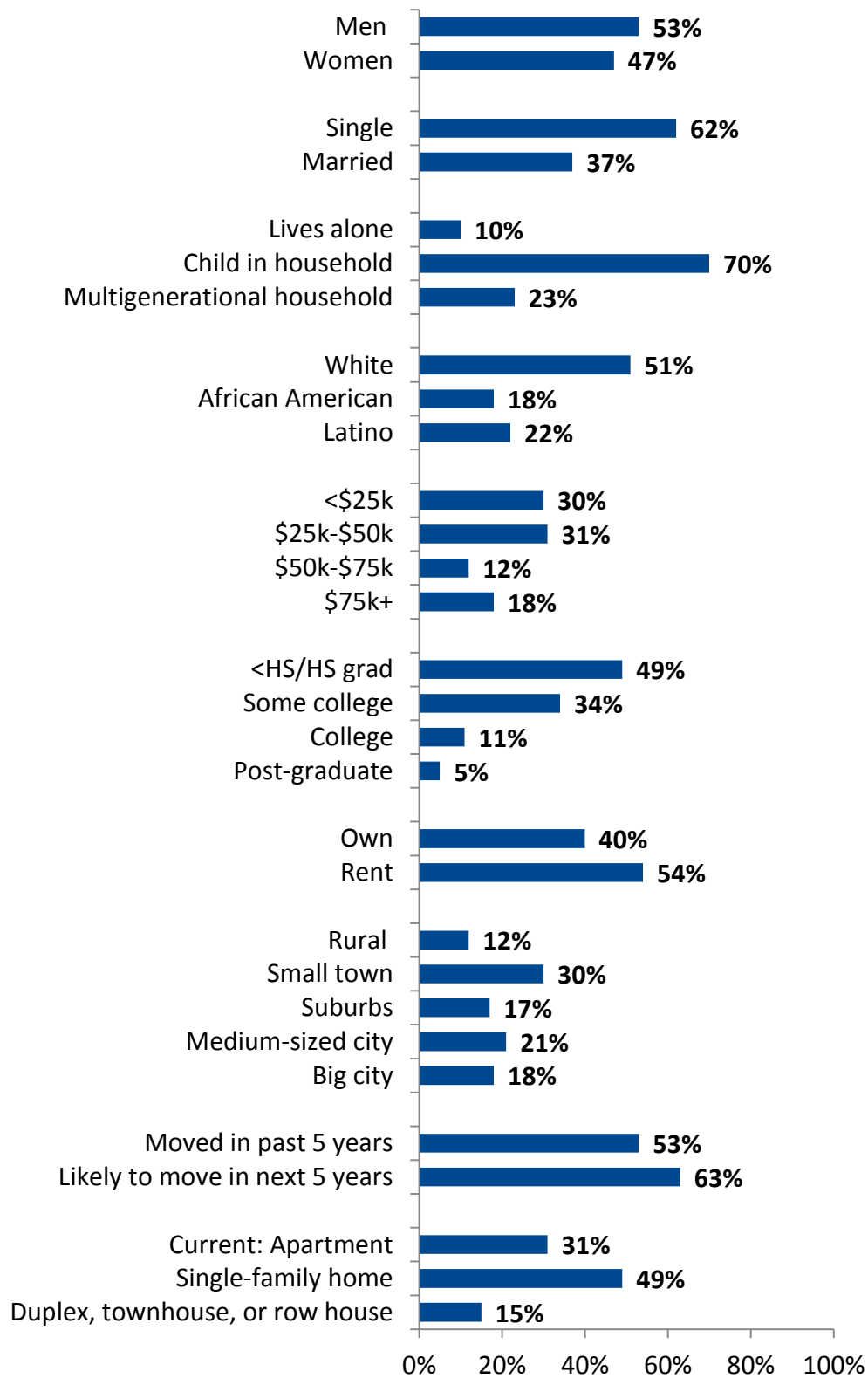


Chart 22: Generation Y's Desired Attributes of Community

Among those ages 18-34

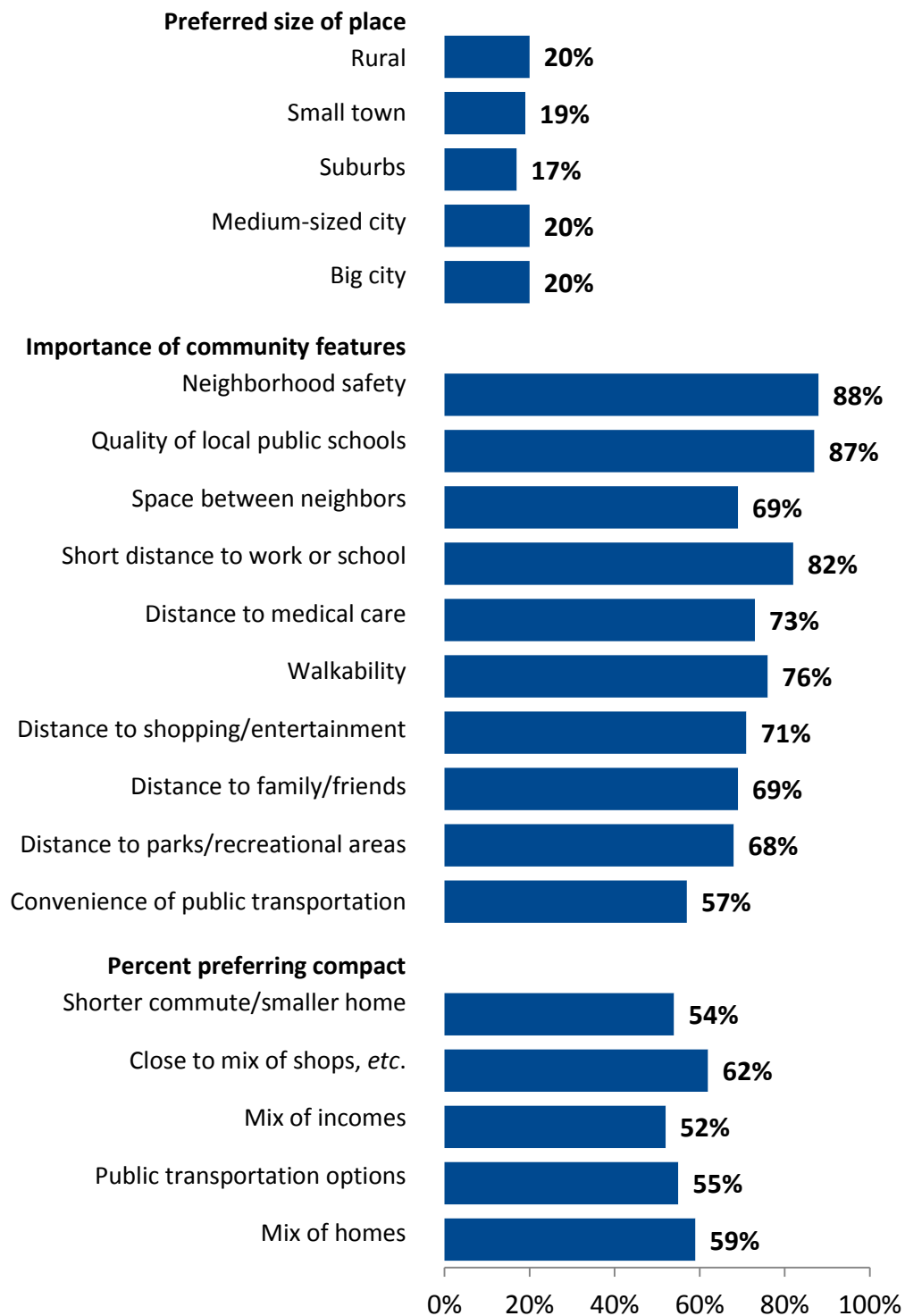
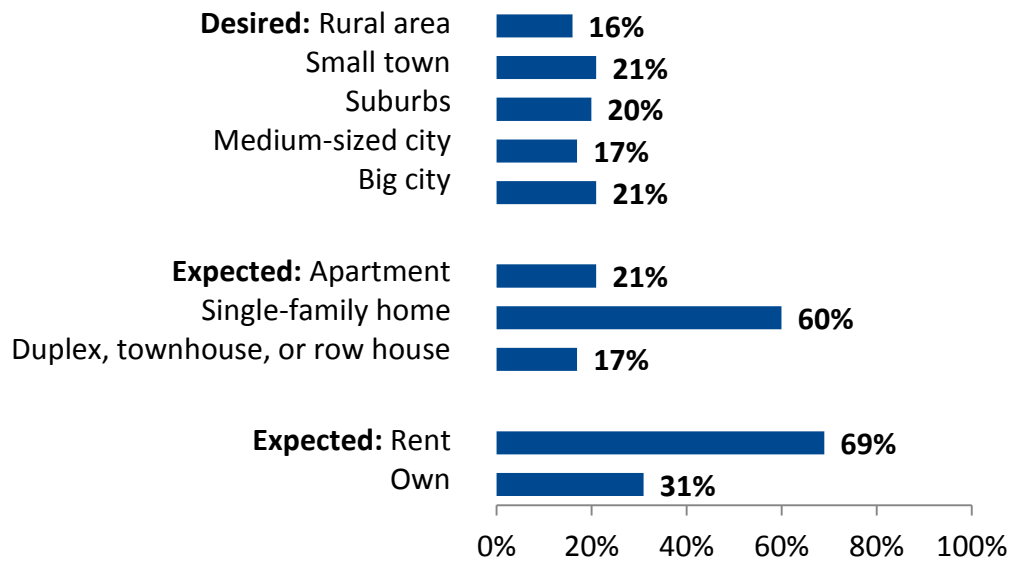


Chart 21: Generation Y Movers

Among those ages 18-34 somewhat or very likely to move in the next five years



Q4. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=228] If you could live any place in the next five years, would it be a rural area, a small town, a medium-sized city, a big city, a suburb near a city, or something else?; Q8. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=228] In five years, what type of home do you expect to live in? An apartment building; a duplex; a row house or townhouse; a single-family, detached house; a manufactured or mobile home; or something else?; Q9. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=228] In five years, do you expect to own or rent your primary residence?

Generation X (23%): Americans currently between the ages of 35 and 47, or Generation X, have been raising families during times of both economic boom and bust and are better educated and more well-off financially than most other generations. The typical Gen Xer is married with children and they are spread across America's cities, suburbs, small towns, and rural areas.

Next to the peripatetic Generation Y, the Gen Xers are the most likely to move in the next five years (41%) and the vast majority of these probable movers expect to live in a single-family, detached home (87%) that they will own (81%). More than three quarters (78%) currently own their own home and just under eight in ten (79%) think owning a home is a good investment – the highest proportion of all age groups.

Unlike their younger counterparts in Generation Y, Gen Xers hold varied opinions on mixed-use communities (50% mix, 49% no mix) and on living in communities with diversified housing (50% similar, 47% mix). They also express a more divided interest in public transportation. Indeed, a slim majority of Gen Xers say public transportation is not something that matters to them (55%) and they are the least likely to place importance on living in communities that are convenient to public transportation (-9 differential). They place a significant amount of importance on the quality of the public schools (+65), as 70% have children under 18 at home.

In sum, on any given day, we can find Gen X members in their cars, driving their children to or from school, and, possibly, dreaming about owning their next house in the country or the suburbs.

Chart 23: Generation X Demographics

Among all those ages 35-47

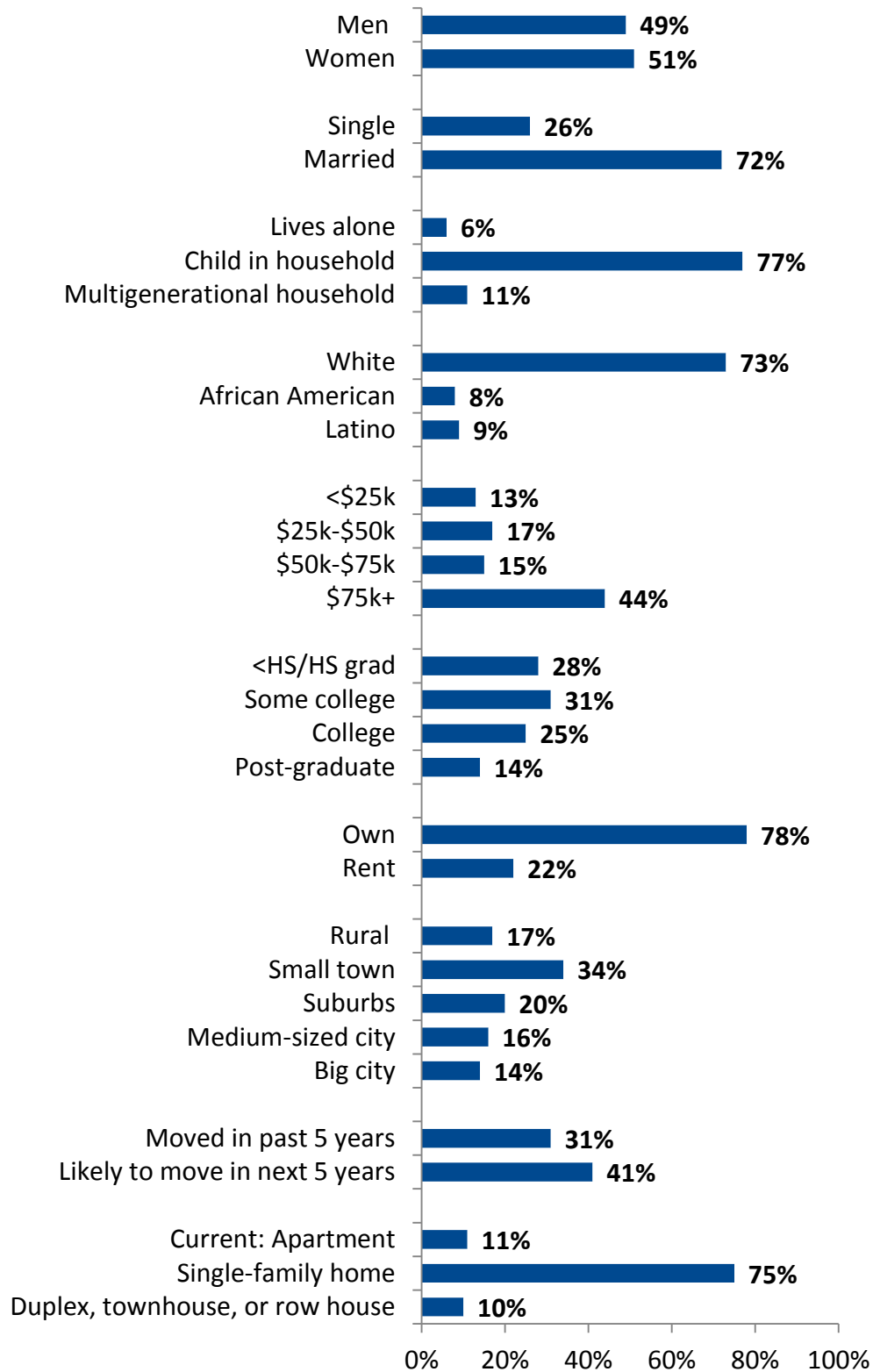


Chart 25: Generation X's Desired Attributes of Community

Among those ages 35-47

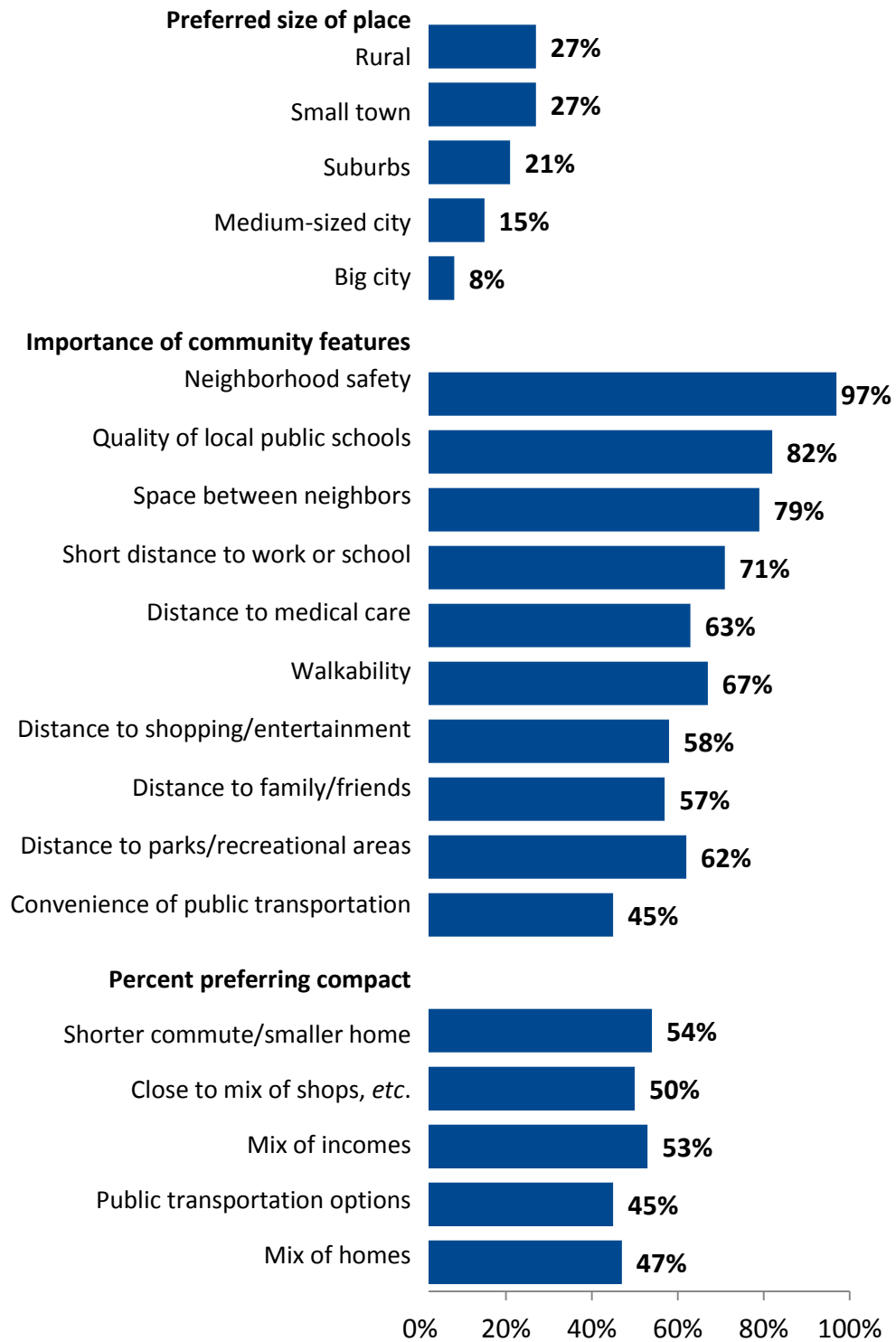
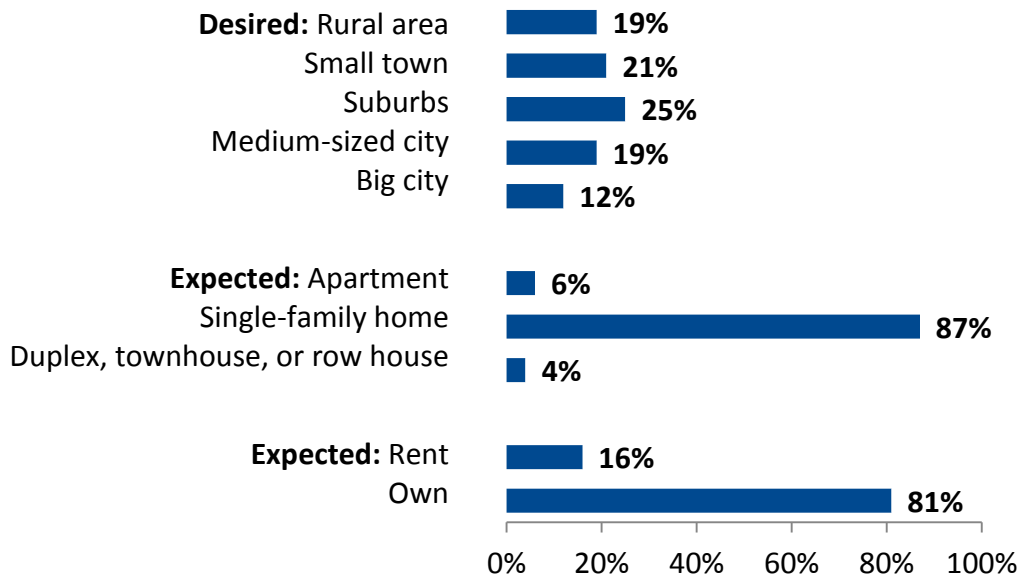


Chart 24: Generation X Movers

Among those ages 35-47 somewhat or very likely to move in the next five years



Q4. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=111] If you could live any place in the next five years, would it be a rural area, a small town, a medium-sized city, a big city, a suburb near a city, or something else?; Q8. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=111] In five years, what type of home do you expect to live in? An apartment building; a duplex; a row house or townhouse; a single-family detached house; a manufactured or mobile home; or something else?; Q9. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=111] In five years, do you expect to own or rent your primary residence?

Baby Boomers (31%): In many ways, the post-World War II Baby Boom Generation, now ages 48 to 66, represents the middle ground. They are more prosperous and educated than the Generation Y, but not as much as Generation X. Similar to Gen Xers, the Baby Boomers are not particularly urban, suburban, or rural, but can be found more evenly across all communities. Another characteristic that Boomers share with Gen Xers is that they are more likely to dream about living a more rural life (30%) than going to a big city (9%).

Consistently representing the norm, Boomers overwhelmingly consider homeownership a good investment (73%). The Boomers – most of whose children have left the nest – are not as anxious to move as the younger generations; indeed, they have less reason to move as four in five Boomers already own their homes (80%) and three-quarters (76%) live in single-family, unattached houses. Only about three in ten Boomers (31%) expect to change residences in the next five years, considerably less than the two in five Gen Xers (41%) and over three in five in Generation Y (63%).

However, there is a hint of an increased market for compact housing among this age group: while 65% of Boomers who are looking to move have their sights set on a single-family, that is a smaller percentage than are currently in one (76%). This is in contrast to every other generation, in which a higher percentage of movers want to be in single-family homes than currently live in them

Even though they are not likely to be considering a move, 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%) would choose a shorter commute over a larger house with a longer commute, compared to only half of the younger generations. Boomers are divided on their views of living in mixed-use communities (49% mix, 50% no mix) and ones with a diversified housing stock (55% similar, 42% mix).

Compared to younger generations, a much smaller majority of Boomers still commutes to work or school three or more days a week (58%) and this number will continue to decline as more Boomers move into retirement. However, nearly every Boomer who commutes drives (90%). More than three in five (63%) report public transportation as available in their communities, but, like other generations, Boomers are not taking it very often.

Boomers might be willing to forego the large house, but that does not mean they are convinced of the advantages of compact, mixed-use developments. They are neither the most nor the least interested in living in communities close to shopping and entertainment (+34 differential), family and friends (+20 differential), medical facilities (+44), communities that are convenient for walking (+35), or using public transit (0). However, Boomers are more interested than other generations in living in a house close to a park (+27) and not so close to their neighbors (+40).

Chart 26: Baby Boomer Generation Demographics

Among those ages 48-66

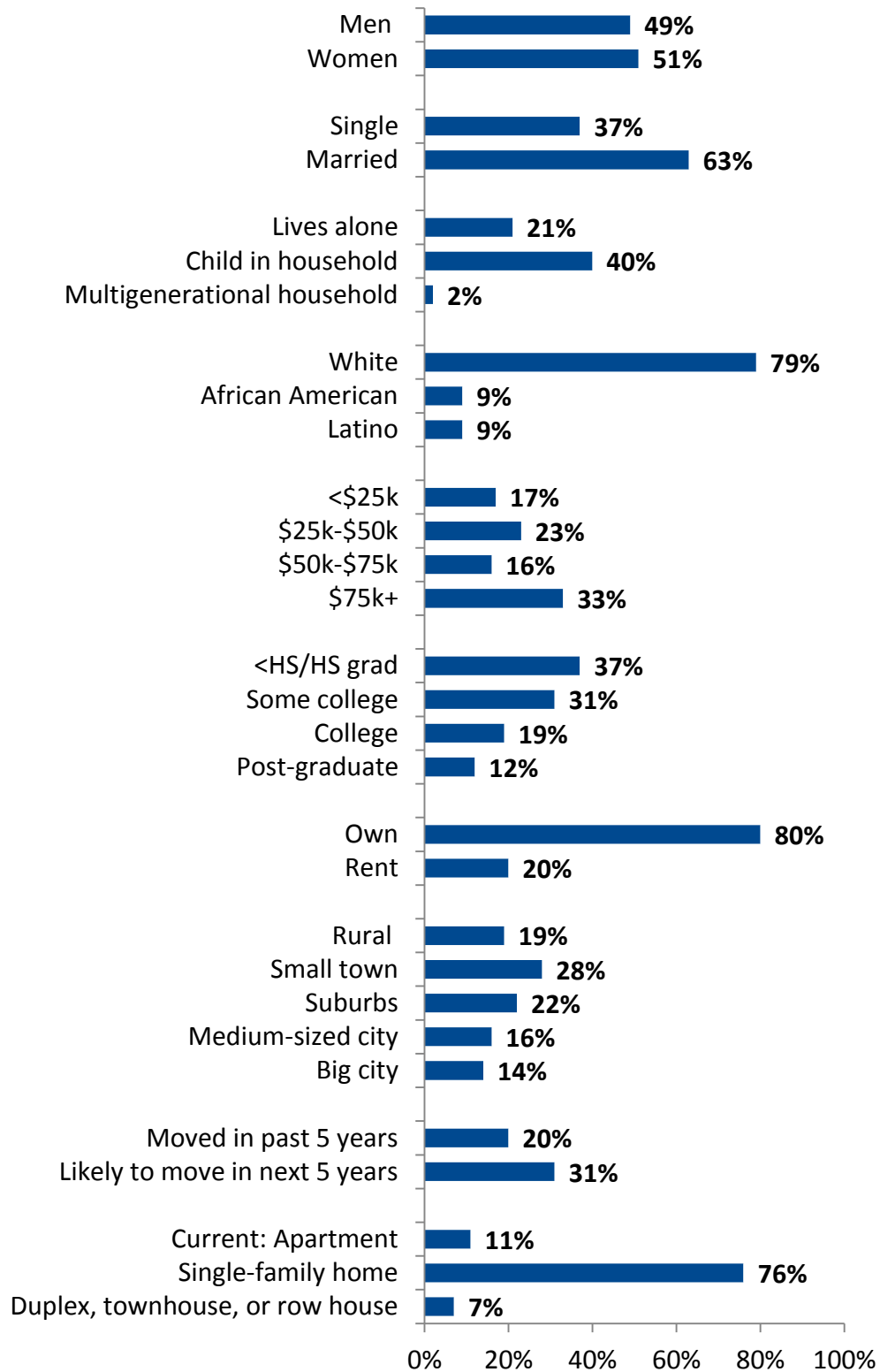


Chart 28: Baby Boomer Generation’s Desired Attributes of Community

Among those ages 48-66

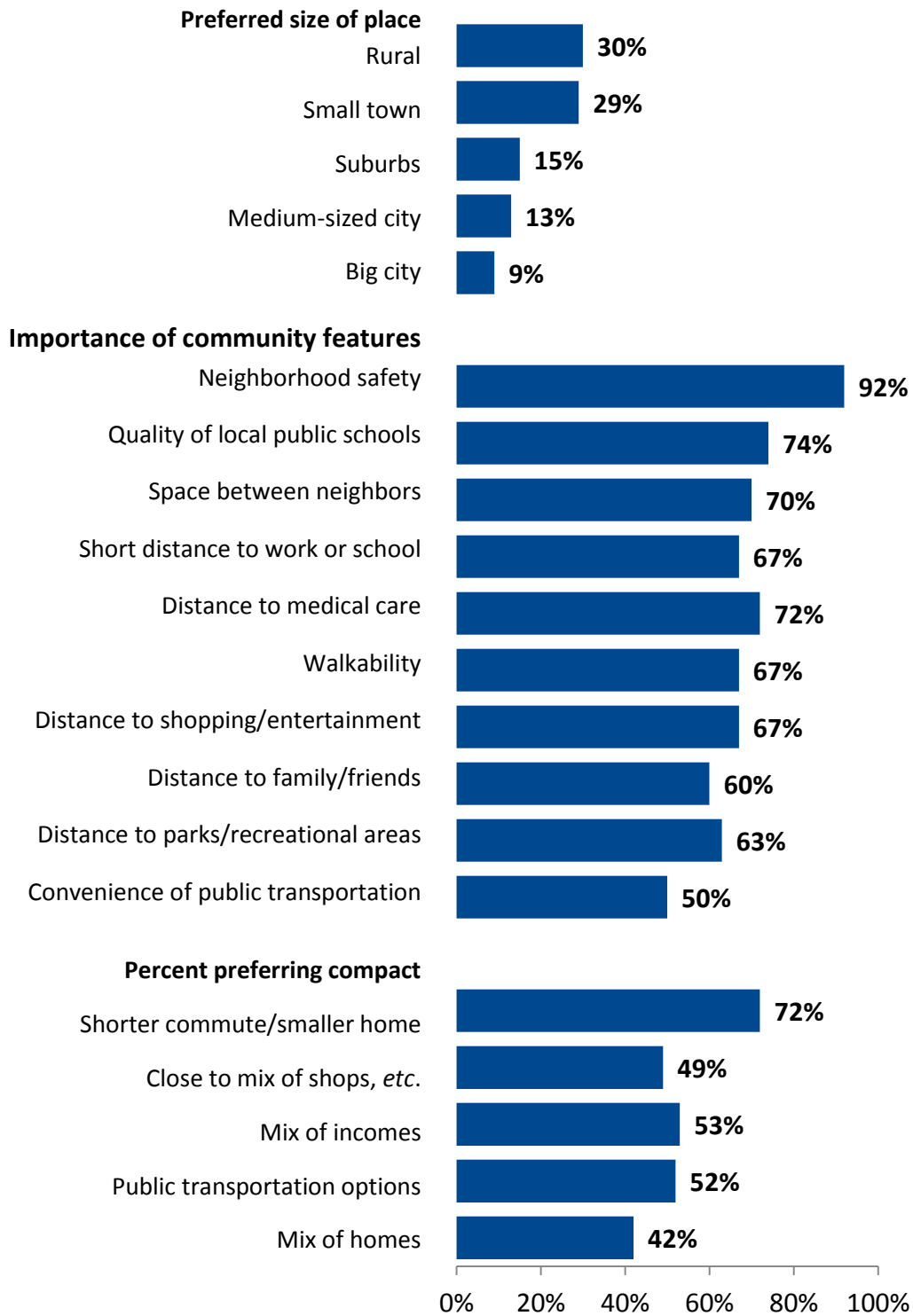
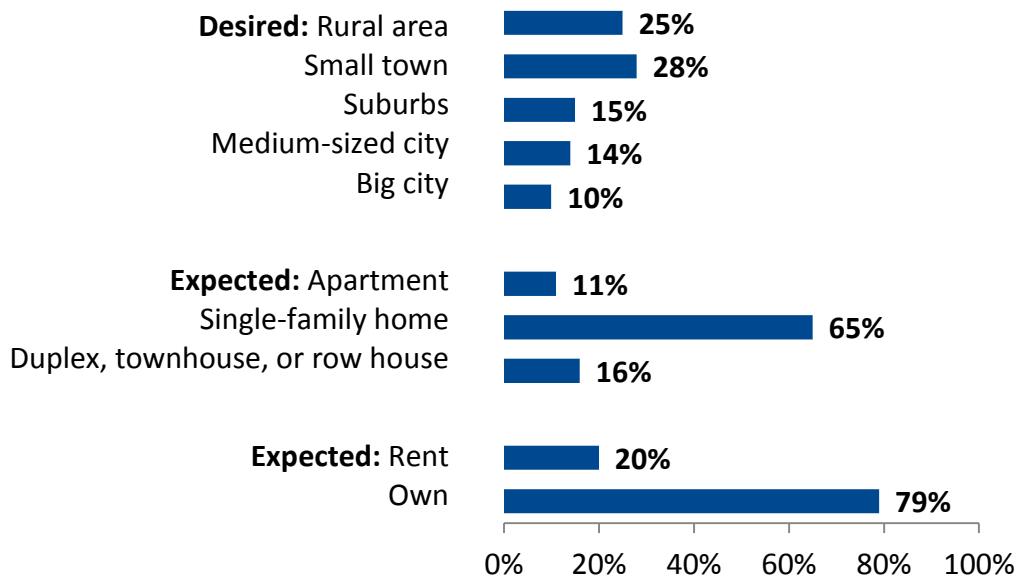


Chart 27: Baby Boomer Generation Movers

Among those ages 48-66 somewhat or very likely to move in the next five years



Q4. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=115] If you could live any place in the next five years, would it be a rural area, a small town, a medium-sized city, a big city, a suburb near a city, or something else?; Q8. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN residence? Q7, n=115] In five years, what type of home do you expect to live in? An apartment building; a duplex; a row house or townhouse; a single-family, detached house; a manufactured or mobile home; or something else?; Q9. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=115] In five years, do you expect to own or rent your primary

War Babies (12%) and Silent Generation (3%): War Babies were born during the Second World War and came of age during the Korean War with the conformity and consumerism that characterized America in the 1950s, while the Silent Generation served in World War Two. The War Babies are currently between ages 67 and 82 and the Silent Generation is 83 years and older. They hold very similar attitudes on housing and transportation and have been combined for this analysis. They have a number of characteristics that set them apart from their younger counterparts: three in five (61%) are women; two in five (41%) live alone; they are among the least affluent of the generations (49% earn under \$50,000); and they are the most likely to live in what they describe as a small town (39%).

Their age and their experiences in life combine to make their housing profile distinct. We might call them the stable generations. Only one in five have moved in the last five years (19%) or expect to move in the next five years (22%) – the lowest level of anticipated changes in housing among the age groups. Like other older-generation Americans, most of the War Babies and Silent Generation own their homes (74%) and live in single-family houses (65%).

Older Americans' preferences reflect their retired stage in life. They stand out as the age group that places a great deal of importance on living in communities that are walkable, meaning with sidewalks and pedestrian cross walks (+39 differential), and where they are a short distance to friends and family (+33), shopping and entertainment (+39), parks (+21), and, naturally, medical care (+57). They hold a slight preference for living in a community with similar housing types (54% similar; 44% mix). They are divided over whether they want to live in a community with a number of public transportation options (48% prefer; 50% does not matter). Fewer than one in ten (8%) in the older generations commute three or more times a week.

In many ways, the War Babies and the Silent Generation are the flip side of the youngest generation, Generation Y, in housing and community choices. They have a heightened sensitivity to the importance of being close to family and friends. Older Americans are not looking to move up, but instead their defining characteristic is stability. They would like their communities to be walkable and convenient and for many – but not most – that includes public transportation.

Chart 29: Silent and War Generations' Demographics

Among those ages 67+

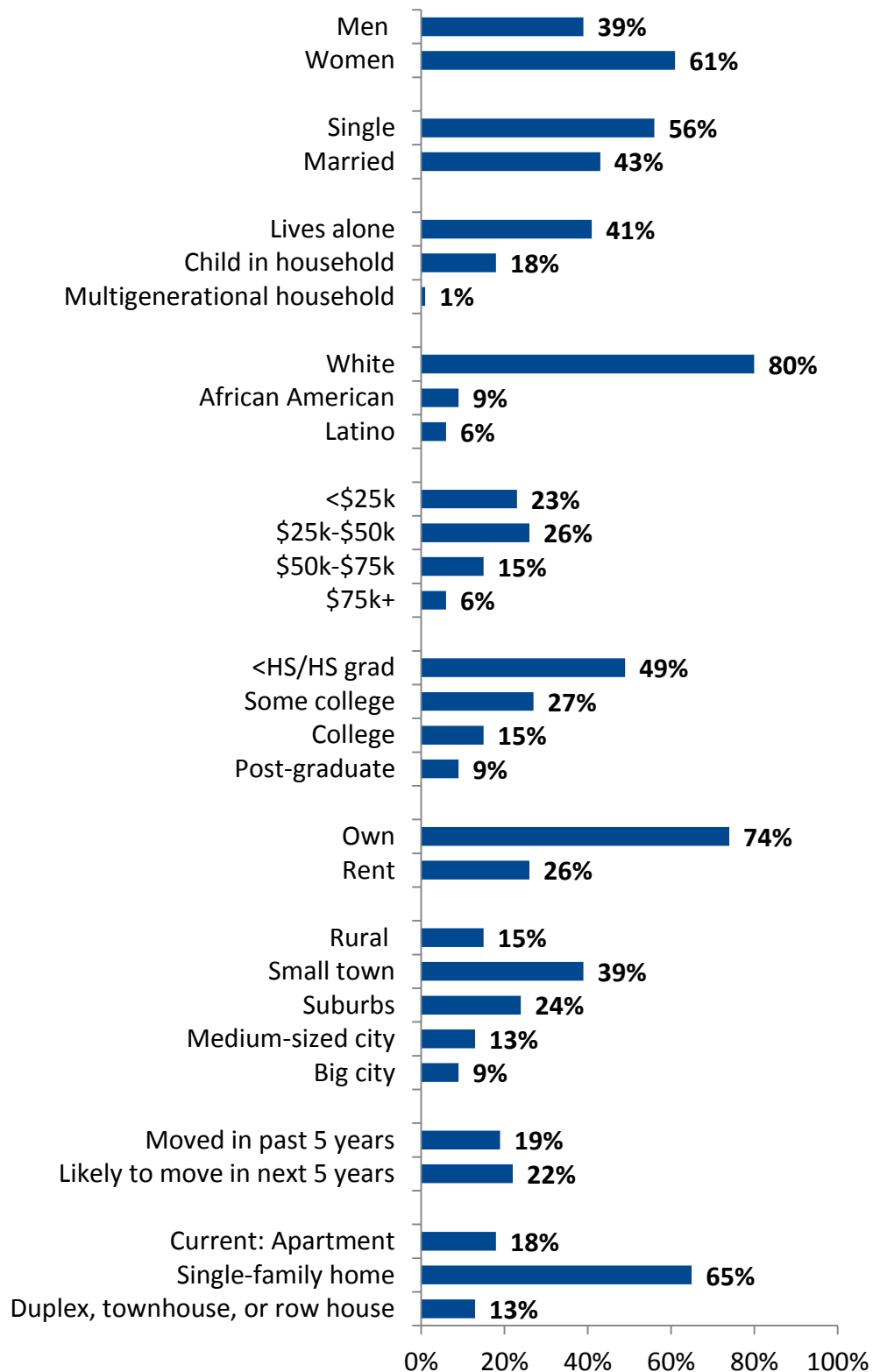
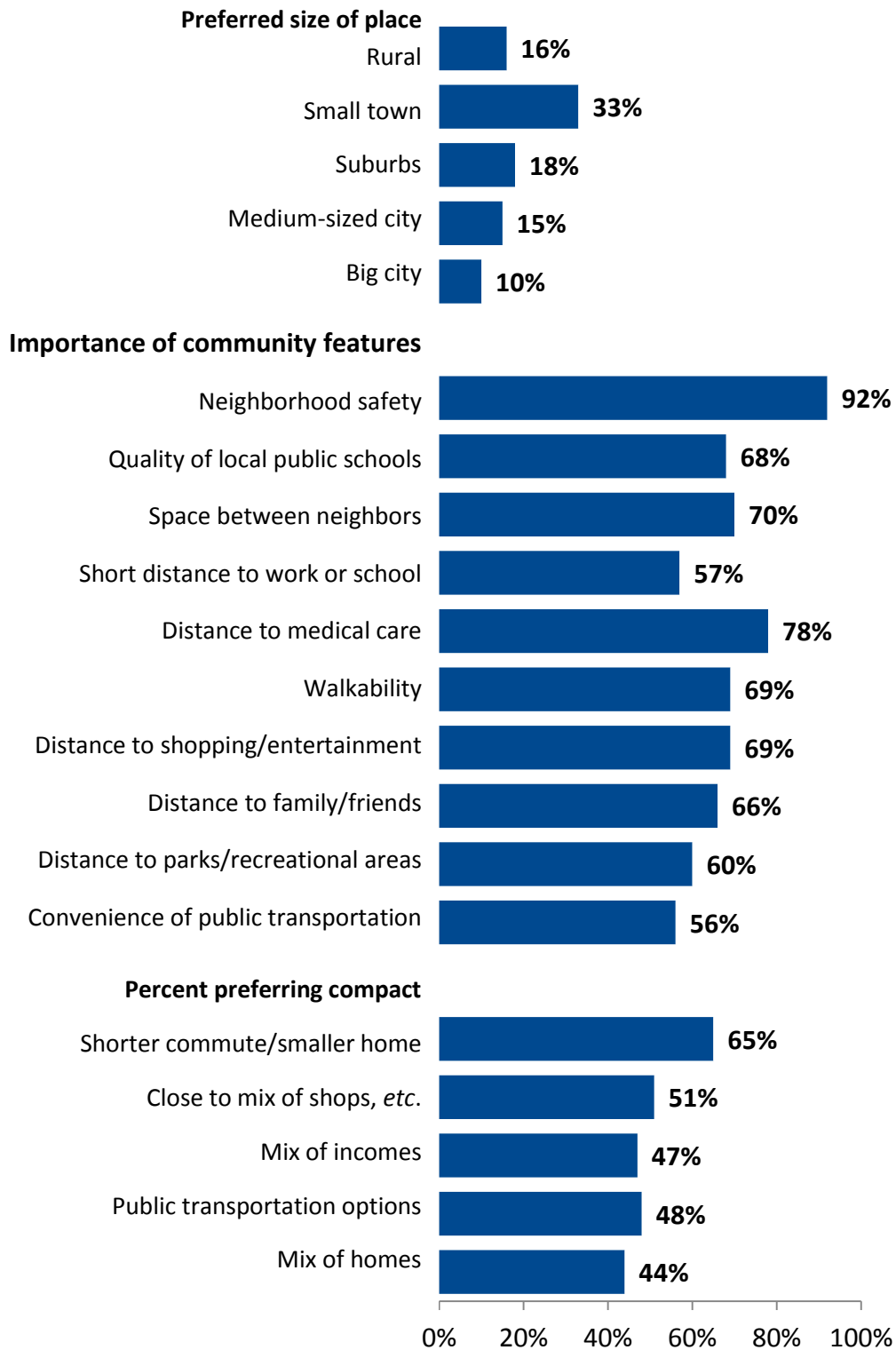


Chart 30: Silent and War Generations' Desired Attributes of Community

Among those ages 67+



2. Other groups

Throughout the survey, the attitudes of Latinos, African Americans, and renters overlap repeatedly with the attitudes of Gen Y. When we take a close look at these groups, we find many similar opinions, mixed with some differences.

African Americans (12%): African Americans are more urban, single, and southern than the nation as a whole. Forty-six percent live in the Southern states and two thirds (66%) say they are single. African Americans are most likely to be living in America's middle-size and large cities (47%), but given the chance, many would move to the suburbs.

Their higher-than-average urban addresses make them split fairly evenly between 43% who live in apartments and 46% who live in single-family, unattached houses. They are highly mobile: about four in ten have moved their residences in the last five years (44%) and 63% plan to move in the next five years.

African Americans hold the distinction of being the demographic group most likely to want to live in a mixed-use community: 75% prefer living with shops and offices and restaurants just around the corner. African Americans also express a broad desire to live in communities with people of diverse incomes (63%) and housing types (56%).

Good schools and convenience are strong demands among the Black community. Sixty-nine percent have children in their households, and they are more likely than others to prioritize the quality of schools (+83 differential), walkability (+74) and the convenience of public transportation (+58) in their communities. African Americans express strong preferences for living in communities which are convenient to stores (+64), medical facilities (+64), and school or work (+62). One in three (32%) currently use public transit on most days to get to work or school, and the great majority (77%) want to live in a community with public transportation options.

Despite the draw of urban living, African Americans remain divided when given a possibility of living in a larger home: 52% would be willing to commute for 45 minutes or longer if it meant living in a bigger home, while 44% would prefer a shorter commute even if it meant living in a smaller home.

Chart 31: African American Demographics

Among all African Americans

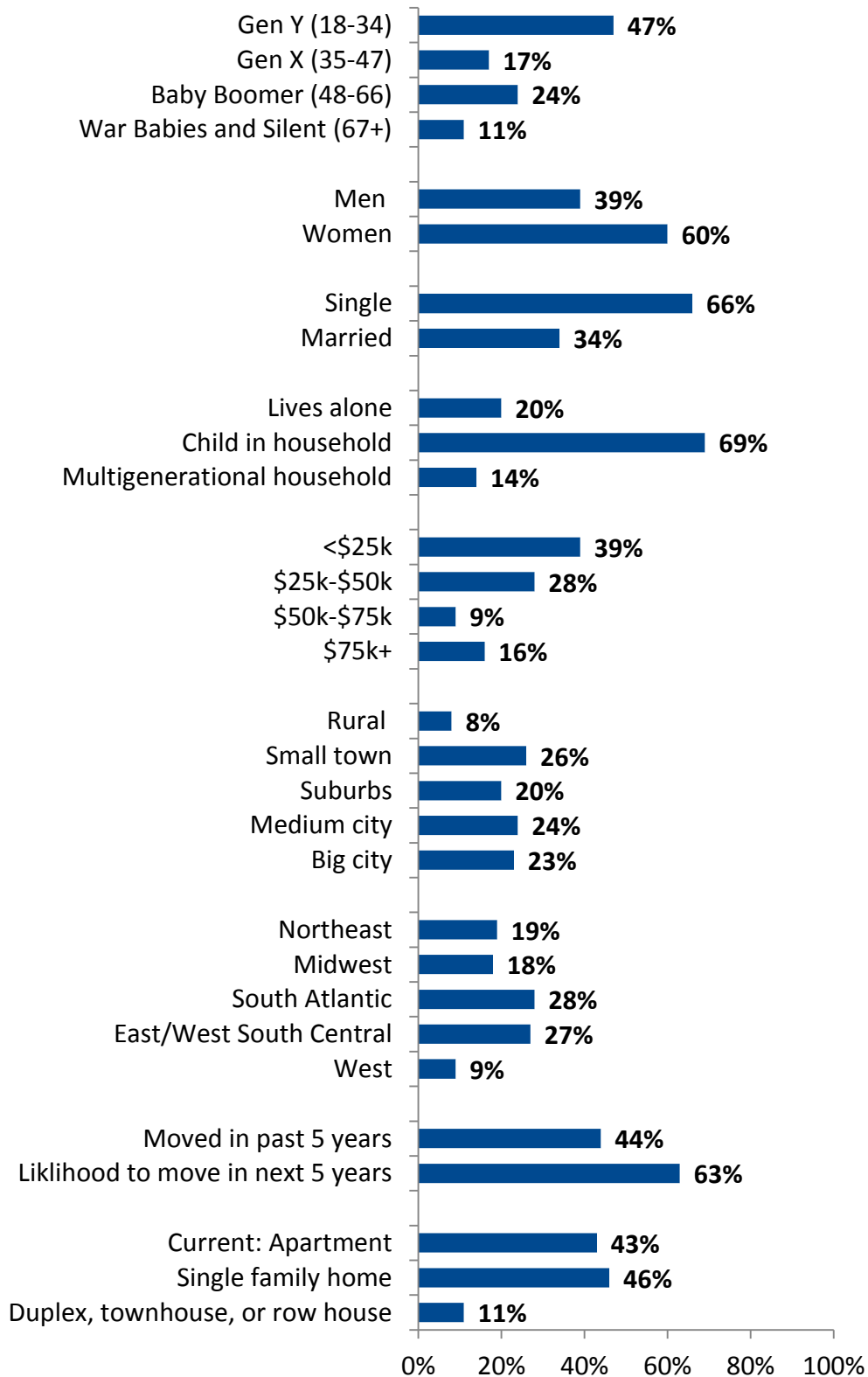
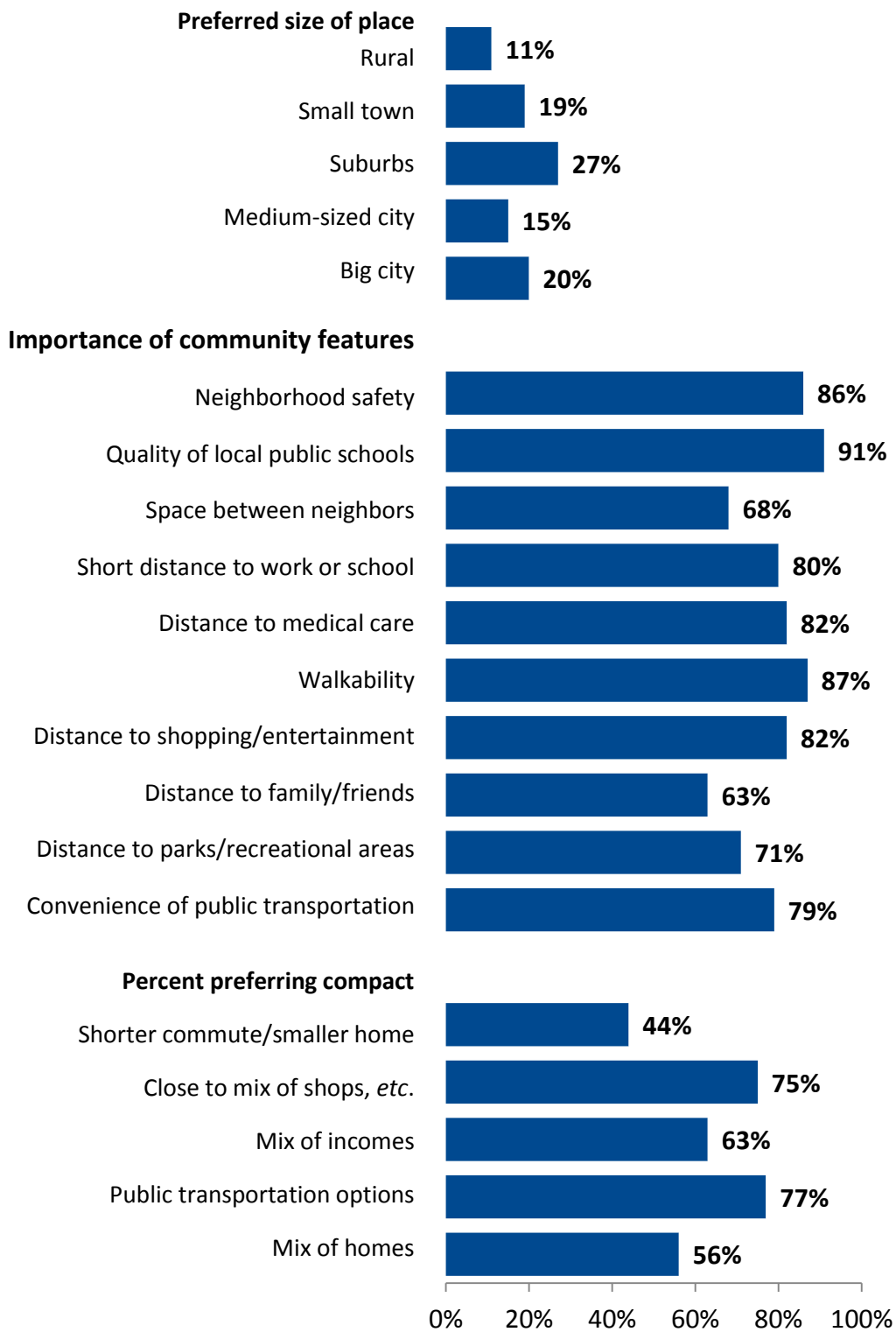


Chart 32: African Americans' Desired Attributes of Community

Among all African Americans



Latinos (13%): The Latino population is younger, less married, more bicoastal, and more likely to be living together with many people in their households than the public as a whole. Latinos have the highest percentage (26%) of people in the lowest household income level, under \$25,000 a year.

Latinos are concentrated in the Western states (47%). They, like African Americans, are most likely to live in cities (58%), especially large cities (30%). Many Latinos, however, if given the opportunity, would prefer to live in the suburbs (20%) or rural communities (12%).

Half of Latinos live in single-family, detached housing (51%) and 23% in apartments. Like African Americans, they are very mobile. Over four in ten (45%) have moved in the last five years, and half (54%) expect to move in the next five years.

A sizeable majority of 58% prefers living in a mixed-use community, but Latinos are more divided on whether they want to live in a community with a diversity of incomes (48% mix, 47% similar) or diversity of housing types (50% mix, 46% similar).

Safety (+64 differential) and schools (+72) top the community characteristic priority list for Latinos, like other groups. However, compared to most others, they are more concerned with walkability (+58) and being close to essential services (medical facilities +64, public transit +46) and family and friends (+54). One in five (20%) currently uses public transportation regularly to get to school or work. Like African Americans, a large number of Latinos blend an appreciation for public transportation with a desire for the larger homes, even if it lengthens their daily commute. Almost half (48%) would be willing to commute for 45 minutes or longer if it meant living in a larger home, while another half (50%) say they would prefer a shorter commute even if it meant living in a smaller home.

Chart 33: Latino Demographics

Among all Latinos

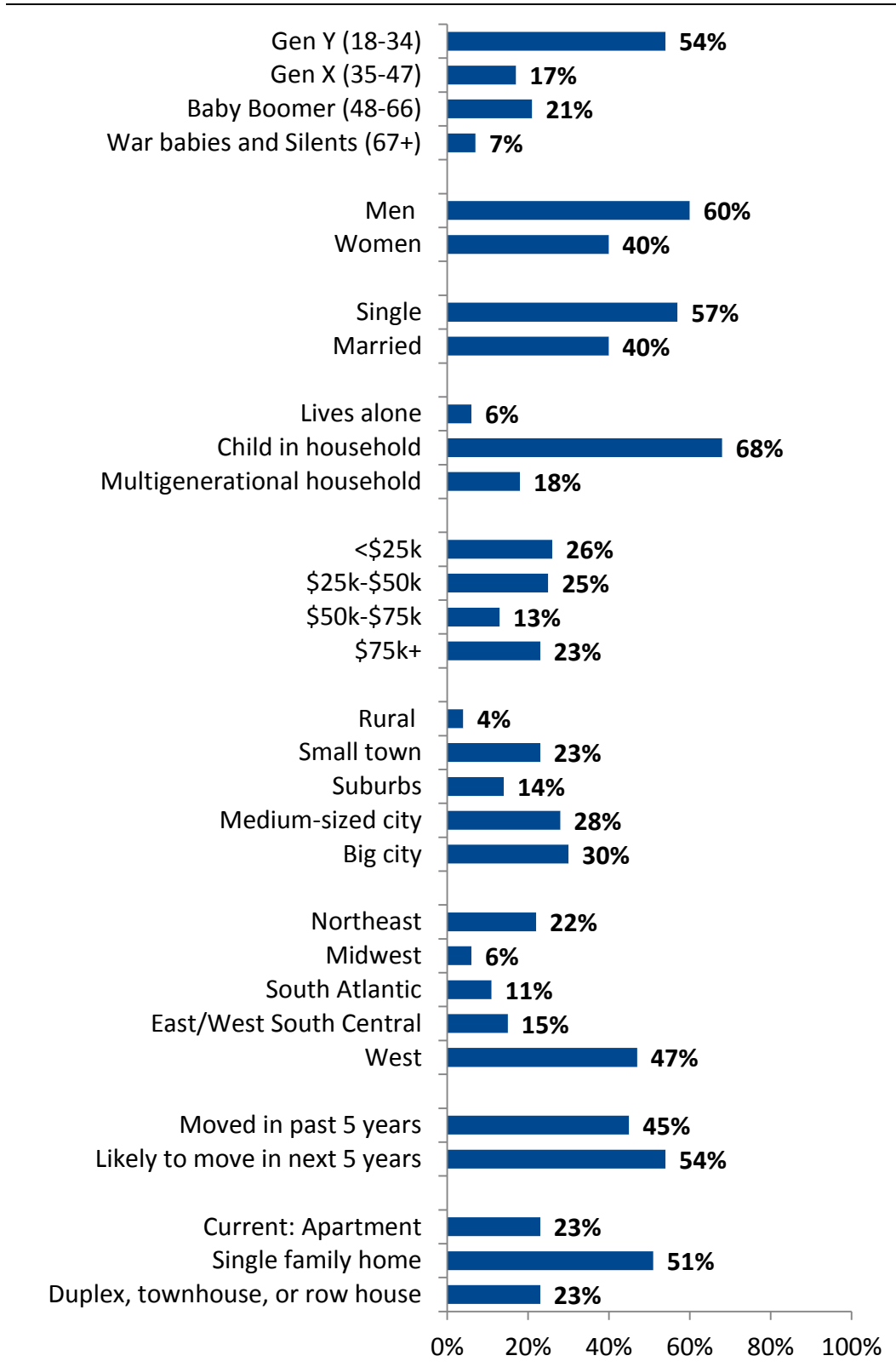
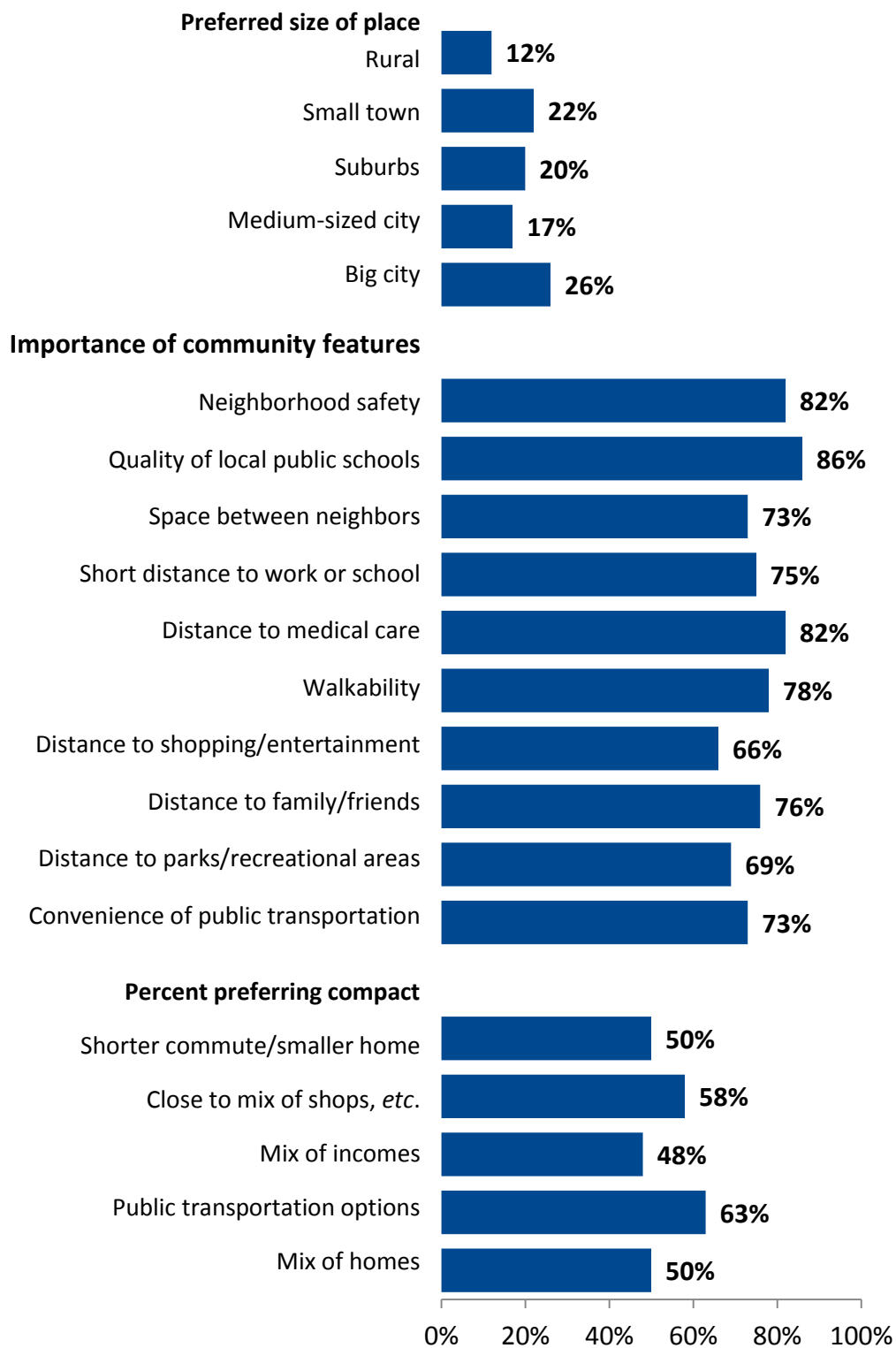


Chart 34: Latinos' Desired Attributes of Community

Among all Latinos



Renters (32%): Renters are more concentrated in urban areas and are a target market for mixed-use living. Generation Y makes up a majority of renters in America (52%), and, in keeping with that age group, renters are more likely than the nation as a whole to be single (65%), living in large cities (24%) and African American (23%) or Latino (20%). Being largely young, renters have relatively lower levels of formal education (51% have only a high school education) and incomes (70% have incomes of \$50,000 or less). They are over-represented in the Northeast (25%) and West (26%).

While a majority of renters (56%) believes home ownership would be a good investment for them, it is a considerably smaller majority than the nation as a whole (71%). Five in ten renters (50%) live in apartment buildings, while three in ten (30%) rent single-family, detached houses. Six in ten (62%) say they are likely to move in the next five years.

Renters would choose to live in a mixed-use community (60%) over one where shops and restaurants are farther away (38%). They also show a preference for communities with a diversity of housing types (57%), but they are divided over whether they prefer living in a community of similar or diverse incomes (48% pick each option).

Safety (+76 differential) and good schools (+67) top the renters' priority list of community characteristics. Having walkable communities (+59) and being close to work and school (+54) are also high on their list.

A majority of renters (62%) prefers living in a community with public transportation options and of commuters a little more than one in five (23%) report using public transportation on most days to get to work or school.

Chart 35: Renter Demographics

Among all renters

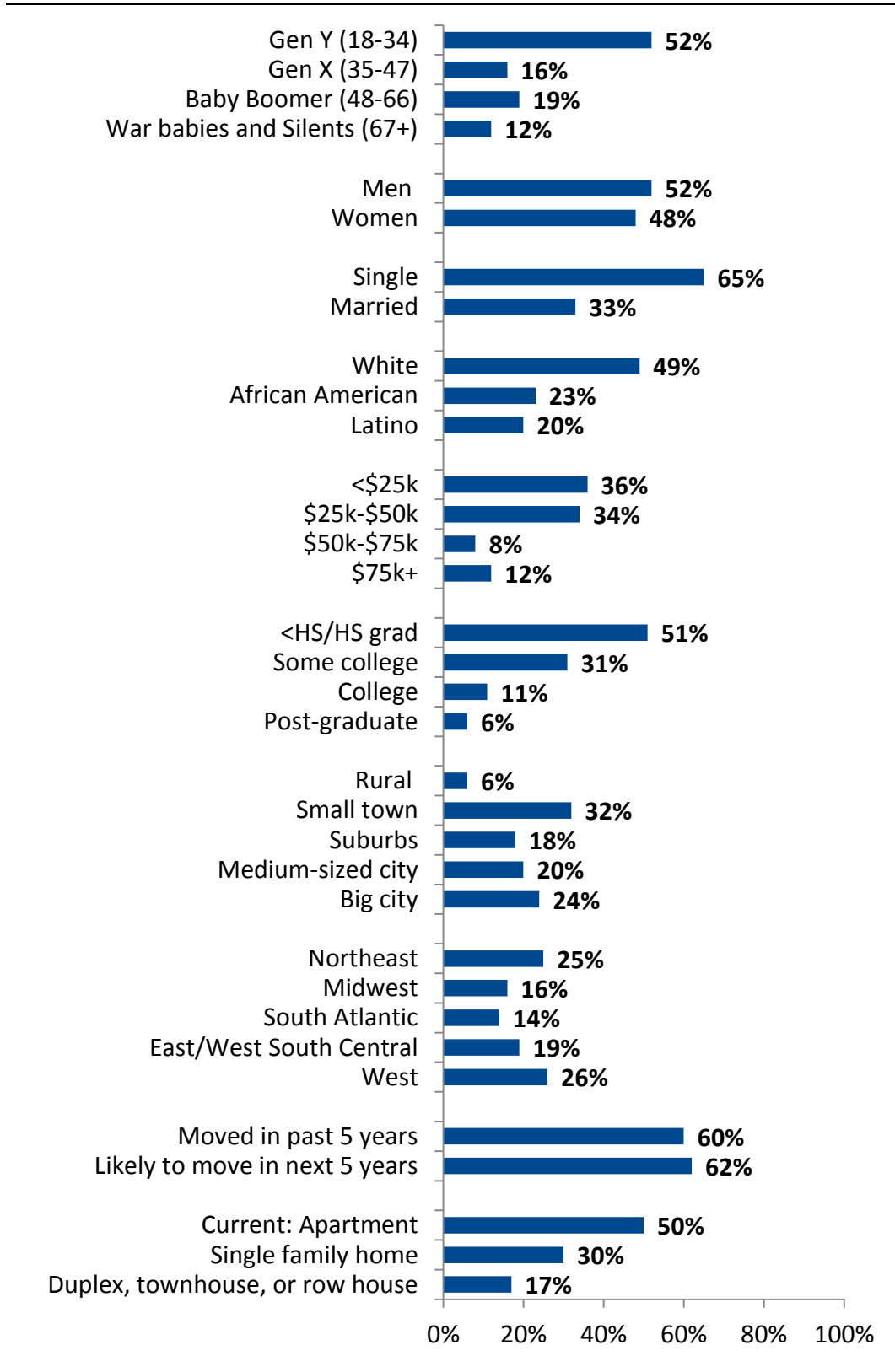


Chart 37: Renters' Desired Attributes of Community

Among all Renters

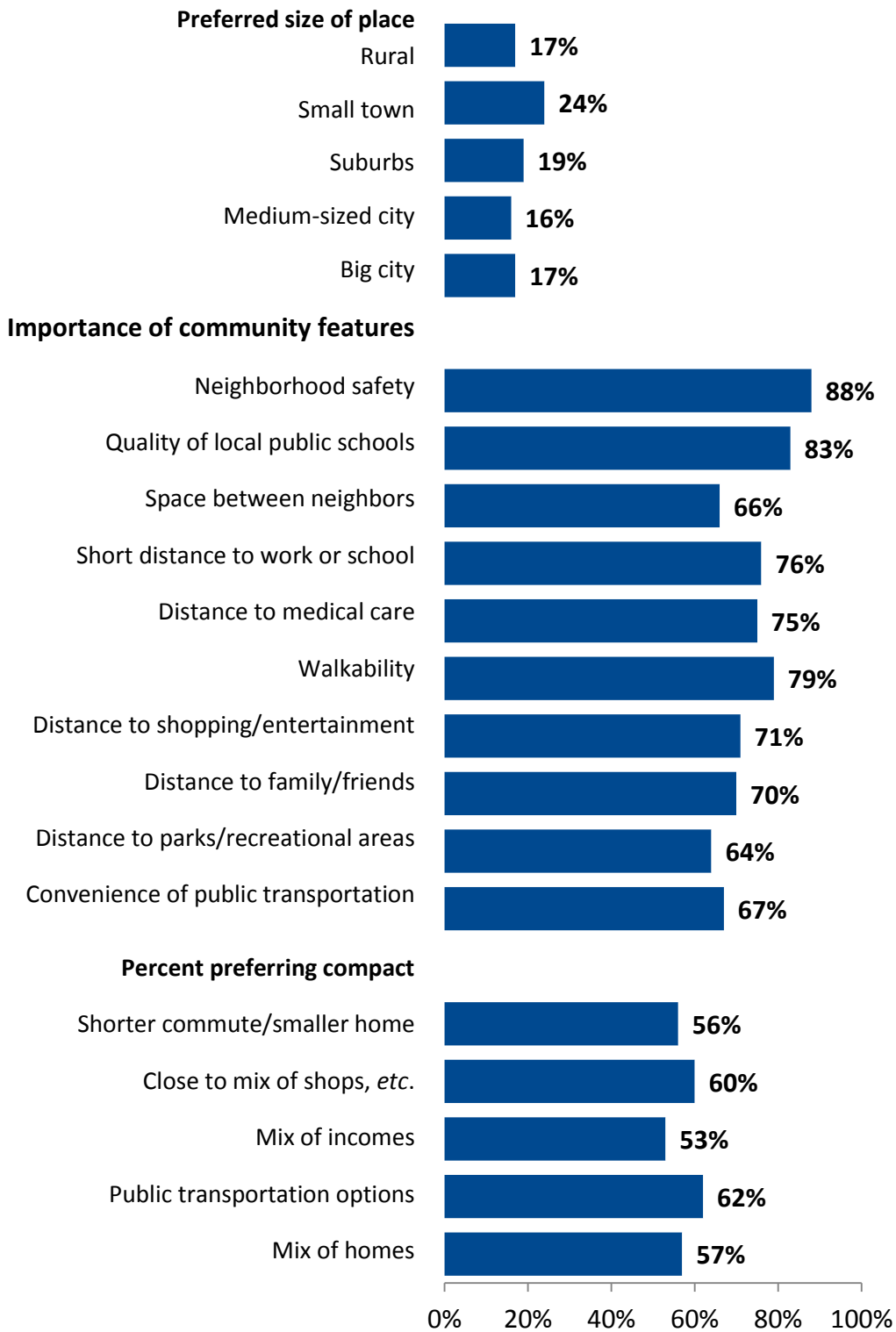
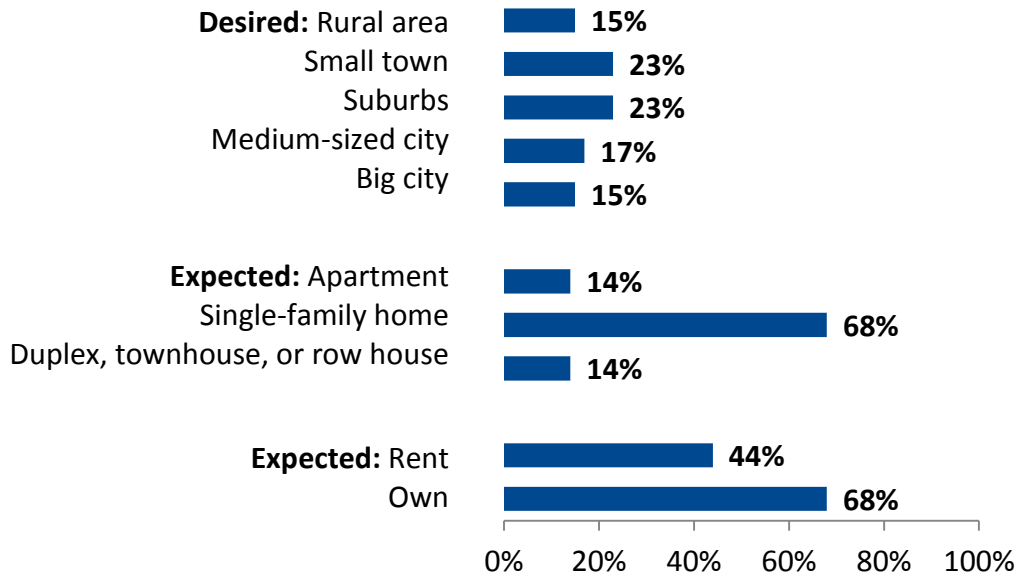


Chart 36: Renters Likely to be Movers

Among renters who are somewhat or very likely to move in the next five years



Q4. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=233] If you could live any place in the next five years, would it be a rural area, a small town, a medium-sized city, a big city, a suburb near a city, or something else?; Q8. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=233] In five years, what type of home do you expect to live in? An apartment building; a duplex; a row house or townhouse; a single-family, detached house; a manufactured or mobile home; or something else?; Q9. [IF VERY LIKELY OR SOMEWHAT LIKELY TO MOVE IN Q7, n=233] In five years, do you expect to own or rent your primary residence?

At a Glance: 2013 Housing and Transportation Survey by Generation

	Gen Y (30% of total)	Gen X (23% of total)	Baby Boomers (31% of total)	War Babies (12% of total) Silent Generation (3% of total)
Definition	1979-1995	1966-1978	1947-1965	War Babies: 1932-1946 Silent Generation: 1931 or earlier
Demographics	<p>Most Latino and African American (40%)</p> <p>Low education (37% <HS/HS/GED)</p> <p>Lower income (61% under \$50K)</p>	<p>Highly educated (39% college degree or more)</p> <p>Highest income (44% \$75K+)</p> <p>Most married (72%)</p>	<p>Higher income (33% \$75K+)</p> <p>Most divorced (15%)</p>	<p>Most women (61%)</p> <p>Lowest income (23% <\$25K)</p>
Current Housing Realities	<p>Most likely in rental housing (54%)</p> <p>Most likely in an apartment (31%)</p> <p>Most likely to have moved in the past five years (53%)</p> <p>Most living with parents/grandparents (28%)</p> <p>Most in a big city (18%)</p>	<p>Most likely to live with children under 18 (70%)</p> <p>Most likely to believe buying a home is a good investment (79%)</p>	<p>Most likely to own their home (80%)</p> <p>Most live in a single-family home (76%)</p> <p>Most believe buying a home is a good investment (73%)</p>	<p>Most likely to live in a small town currently (39%)</p> <p>Least likely to have moved in the past five years (19%)</p> <p>Most likely to live alone (41%)</p> <p>Least likely to believe buying a home is a good investment (55%)</p>
Future Housing Desires and Expectations (in the next five years)	<p>Most likely to want to in a big or medium-sized city (40%)</p> <p>Most likely to move (63%)</p> <p>Likely to own future home (69%)</p> <p>Likely to live in an apartment (21%)</p>	<p>Most likely to own future home (81%)</p> <p>Least likely to rent (16%)</p> <p>Least likely to live in a big city (8%)</p> <p>Most likely to live in a single-family home (87%)</p> <p>Most likely to live with children under 18 (61%)</p>	<p>Less likely to move (31%)</p> <p>Likely to live in a single-family home (65%)</p>	<p>Most likely to live in a small town (33%)</p> <p>Least likely to move (22%)</p>

At a Glance: 2013 Housing and Transportation Survey by Generation (cont.)

	Gen Y (30% of total)	Gen X (23% of total)	Baby Boomers (31% of total)	War Babies (12% of total) Silent Generation (3% of total)
Preferred Characteristics of Community	<p>Most likely to seek diversity of homes (59%)</p> <p>Most likely to seek mix of shops, restaurants, and offices (62%)</p> <p>Most likely to value walkability of community (+52*) and quality schools (+74*)</p> <p>Divided on shorter commute/small home (54%) vs. longer commute/bigger home (44%)</p>	<p>Least likely to value short distance to friends and family (+14*), medical care (+27*), and shopping and entertainment (+16*)</p> <p>Least likely to value convenience of public transportation (-9*)</p> <p>Divided on shorter commute/smaller home (54%) vs. longer commute/bigger home (43%)</p>	<p>Most likely to want to live where homes are similar (55%)</p> <p>Least likely to seek a mix of shops, restaurants, and offices (49%)</p> <p>Most likely to prefer a shorter commute and a smaller home (72%)</p> <p>Least likely to value walkability of community (36%*)</p>	<p>Most likely to value distance to medical care (+57*), friends and family (+33*), and shopping and entertainment (+39*)</p> <p>Most likely to value convenience of public transportation (+14*)</p> <p>Least likely to value the quality of public schools (+42*)</p>
Transportation	<p>Most likely to have (81%) and want (55%) public transportation options</p> <p>Most likely to commute (86%)</p> <p>Least likely to commute by car (77%)</p> <p>Most likely to commute by public transit (18%)</p>	<p>Least likely to have (63%) or want (45%) public transportation options</p> <p>Most likely to drive nearly every day (89%)</p> <p>Most likely to commute by car (92%)</p>	<p>Least likely to have public transportation in community (63%)</p> <p>Divided on community having public transportation options (52%) vs. options don't matter (48%)</p> <p>Least satisfied with public transit availability (38%)</p> <p>Highly likely to commute by car (90%)</p>	<p>Least likely to drive nearly every day (57%)</p> <p>Divided on community having public transportation options (48%) vs. options don't matter (50%)</p> <p>Least likely to commute (8%)</p>

* Percentage represents the difference between the percentage of respondents who gave a high score and a low score on a particular community characteristic