

America in 2013

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



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**Urban Land
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Terwilliger Center for Housing

America in 2013

Will the changing face of America be a catalyst for a changing landscape as well?

America is a diverse nation and our story is ever evolving. How we feel and what we value about the communities we live in is changing, too. The Urban Land Institute's Infrastructure Initiative and Terwilliger Center for Housing set out to discover where America stands in 2013 when it comes to views on housing, transportation, and community.

In partnership with Belden Russonello Strategists LLC, a nationally recognized survey and communications firm, ULI conducted a statistically representative survey of 1,202 adults living in the United States.

The results of the survey provide an important benchmark on American attitudes and expectations around community choices. While the survey finds that the American people are overwhelmingly satisfied with their community's quality of life, the survey also highlights the diversity of views Americans hold about where and how they live and what they want.

This document presents a summary of key survey takeaways, but there is much more to learn about America in 2013. We invite you to take a closer look at the survey online at <http://www.uli.org/communitysurvey>.

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How We Feel

87% of Americans are somewhat or very satisfied with the quality of life in their community.

Despite this general sense of well-being, there are areas of division among Americans related to satisfaction with career opportunities and access to transit. Survey respondents were more satisfied with their home (89%) than with the range of transportation options available in their community (72%).



72%
are satisfied with
transportation options



43%
are satisfied with
public transit
availability



49%
are satisfied with
number and quality
of job opportunities



75%
are satisfied with
public transit quality
(when it's available)

What We Value

Americans are a study in contradictions. Americans value having a lot of space between themselves and neighbors about as much as they value walkability.

Neighborhood safety and **schools** top the list of important community characteristics for many Americans. Even though convenient public transportation is at the bottom of this list, 52% of Americans say it is important to them.

Percentage Giving Community Attribute a High Ranking in Importance

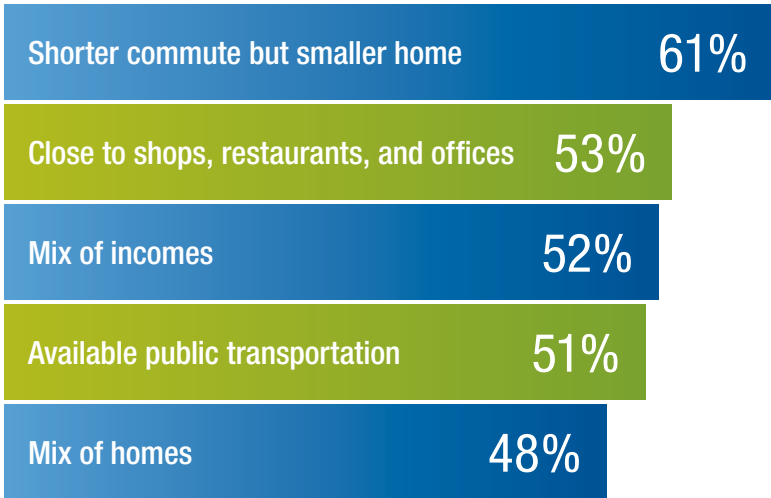
| | | | |
|--|--|---|--|
| | 92% Neighborhood safety | | |
| 71% Proximity to health care | 70% Easily walkable | 66% Proximity to entertainment | 79% Quality of public schools |
| 72% Space between neighbors | 64% Proximity to recreation | 63% Proximity to family/friends | 52% Convenient public transportation |
| | | 71% Proximity to work/school | |

What We Value

Despite showing generally positive feelings about rural living, the survey results on closer review indicate that there are aspects of mixed-use communities that appeal to a large percentage of Americans. More than half of Americans prefer **neighborhoods that are close to shops, have a mix of incomes, and have public transportation.**

Neighborhoods that are close to a mix of shops, restaurants, and offices are especially appealing to African Americans (75%), members of generation Y (62%), single people (60%), renters (60%), and college graduates (60%).

Percentage Indicating a Preference for These Community Attributes



What We Value

Compact development also resonates with a broad range of Americans. Moreover, many Americans express a willingness to have a shorter commute even if it means a smaller home.

54% of Americans say they would like their community to have three or more of the five attributes associated with compact development.

Percentage Preferring Three or More Compact Development Attributes

| | | | |
|-----------------------------|-----|---------------------|-----|
| All respondents | 54% | Income <\$25K | 63% |
| African American | 70% | Renters | 62% |
| Multigenerational household | 66% | Living alone | 62% |
| Single | 66% | Post-grad education | 60% |
| Living in medium-sized city | 65% | \$25K–\$50K income | 59% |
| Living in big city | 65% | Gen Y | 59% |

Where We Live

66% of Americans own their home, despite recent upheavals in the housing market.

While homeownership is still a key facet of the American Dream, some of the fastest-growing demographic segments of the U.S. population are predominantly renters.

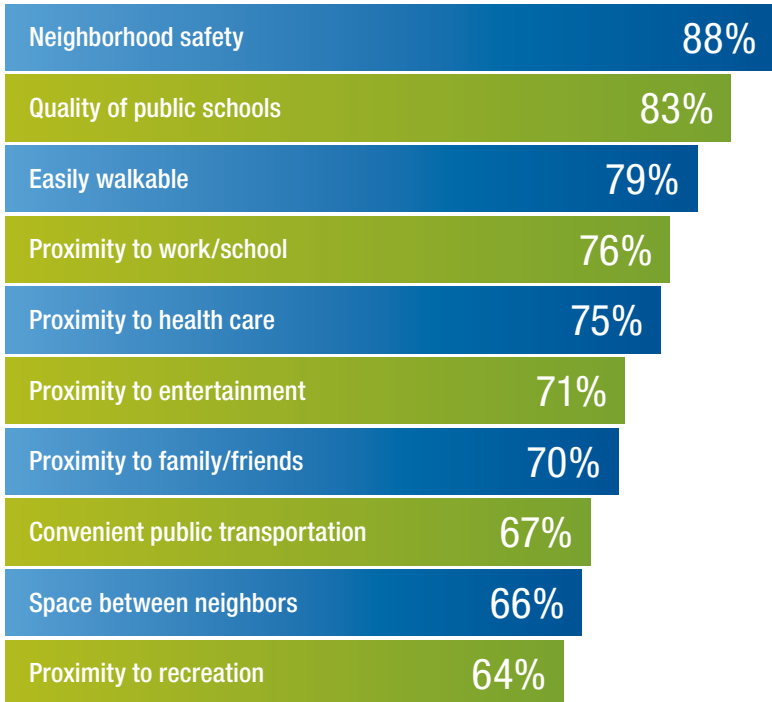
Percentage Owning Their Home



Where We Live

American renters desire many of the same community attributes as homeowners. Renters place a high value on neighborhood safety, good local schools, and walkability, and demonstrate a clear preference for compact development.

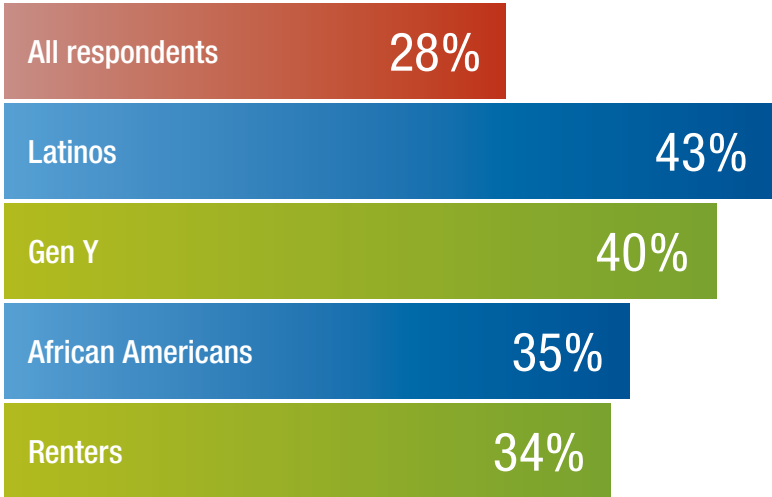
Percentage of Renters Giving Community Attribute a High Ranking in Importance



Where We Live

The pull of rural areas and small towns remains strong, but a **desire for medium- or big-city living** is expressed by some of the fastest-growing segments of the American population, including Latinos, generation Y, and African Americans. Renters also show preference for cities.

Percentage Preferring Medium or Big Cities



How We Move

Americans are daily drivers, but other modes of transportation, including walking, are important.

77%
drive daily

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

6%
**use public buses
and trains daily**

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

2%
bike daily

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

22%
**walk to a destination
nearly every day**

Big-city dwellers walk the most, with 39% walking daily and another 20% walking at least once a week.

How We Move

52% of Americans consider convenient public transit to be a meaningful community attribute.

An important point: those Americans *without* public transit service are very dissatisfied by the lack of access.



75%
are satisfied with the
quality of public transit

Where public transit
is available



51%
are dissatisfied with the
lack of public transit
availability

Where public transit
is unavailable

How We Move

Daily use of transit may be relatively low, but it is important to understand which segments of the American population **prefer having public transportation options.**

Income and education are also factors in preference for public transportation. A higher percentage of those earning less than \$25,000 per year (63%) say they prefer transit options than those earning \$75,000 per year or more (40%). 60% of those with a postgraduate education prefer transit, compared with 48% of Americans with only a high school education or less.

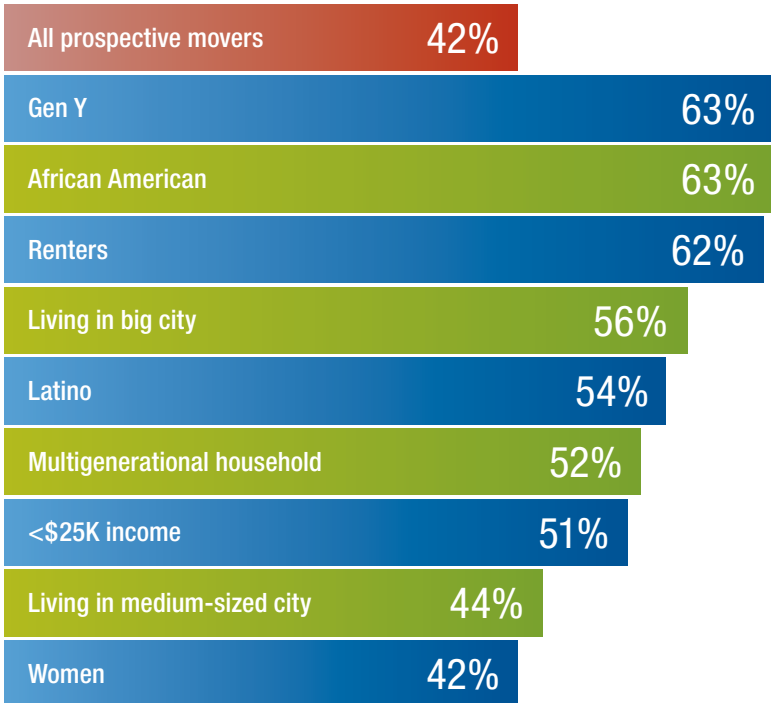
Percentage Preferring Public Transportation Options

| | | | |
|-----------------------------|-----|---------------|-----|
| All respondents | 51% | Single | 58% |
| Living in big city | 69% | Gen Y | 55% |
| Renters | 62% | Living alone | 53% |
| Living in medium-sized city | 61% | Baby boomers | 52% |
| Multigenerational household | 60% | Likely movers | 52% |

Where We'll Go

America is a **nation on the move** in more ways than one. More Americans say they have plans to move within the next five years than have moved in the past five years. Who are these movers and what impact will they have on the places they will go?

Percentage Likely to Move in the Next Five Years



Where We'll Go

62% of Americans planning to move in the next five years would prefer to settle in mixed-use communities. Many want communities that include a mix of homes and have access to public transportation.

Percentage of Movers Indicating a Preference for These Community Attributes



62%

Close to shops, restaurants, and offices

59%

Shorter commute but smaller home

52%

Available public transit

50%

Mix of homes

47%

Mix of incomes

Who We'll Live With

The type of community Americans want to live in is not the only thing that will be changing in the next five years. **The size and composition of the American household will also see some changes.** 21% of baby boomers expect to have adult children living at home. 19% of singles expect to have their parents or grandparents in residence.

Expected Household Composition

| | Parents/ grandparents | Children 18+ | Multi- generational |
|------------------------|--------------------------|-----------------|------------------------|
| All respondents | 13% | 17% | 9% |
| Gen Y | 16% | 21% | 13% |
| Gen X | 16% | 6% | 12% |
| Baby boomers | 8% | 21% | 3% |
| Single | 19% | 20% | 14% |
| Married | 7% | 15% | 5% |
| \$50K–\$75K income | 19% | 21% | 14% |
| Some college completed | 20% | 24% | 13% |

About Us



Since 1982, Belden Russonello Strategists LLC has helped nonprofits, political campaigns, news media, and other clients understand the relationships between issues and motivations for action, whether it is rethinking policy, attracting new members, or changing attitudes and behavior.



ULI's Infrastructure Initiative works to promote more sustainable infrastructure investment choices and to foster an improved understanding of the links between infrastructure and land use.



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

Learn more about America in 2013 at
<http://www.uli.org/communitysurvey>.