

# Shifting Preferences: The “America in 2013” Survey

**Great Spaces: Happy Faces**  
**The Alliance for Housing Solutions**  
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# Great Spaces have...



And more!



- How will changing demographics affect how Americans feel about their communities, housing and transportation?
- What do they want for themselves and their families in the future?
- What is the level of interest in compact development?
- How does demand vary by generation?

# What do we value in our neighborhoods?

*Everything.*

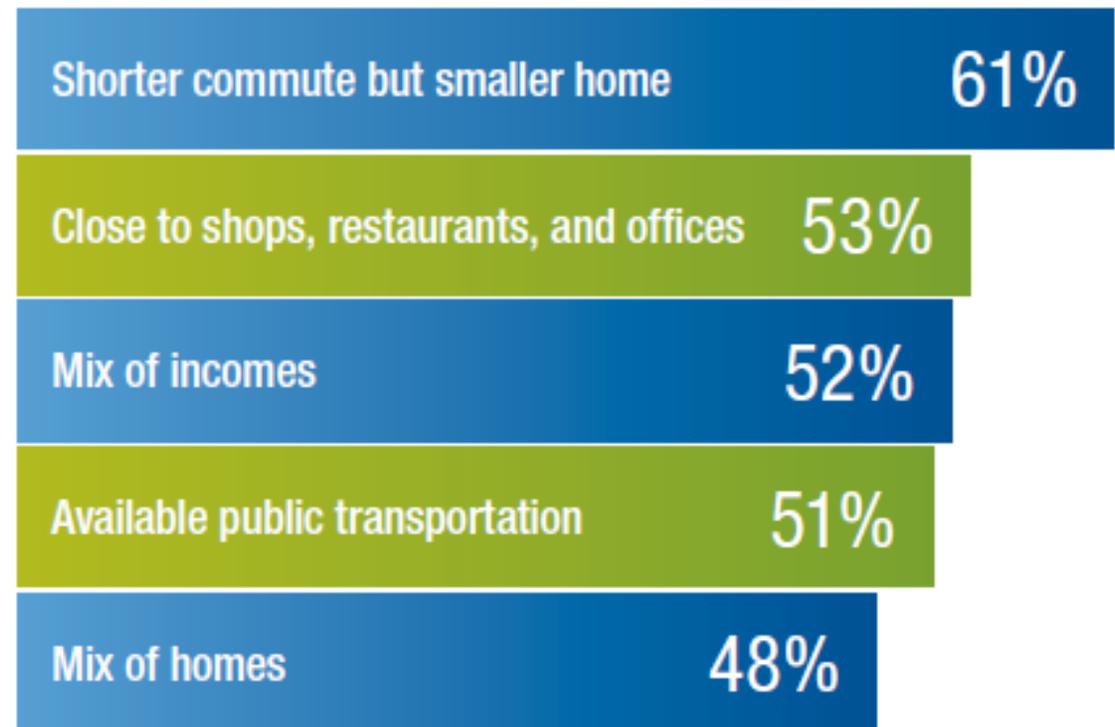
Percentage Giving Community Attribute a High Ranking in Importance

	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

**54%** of all adults surveyed chose three or more compact development attributes.

*Percentage Indicating a Preference for These Community Attributes*



“THERE ARE TWO THINGS  
AMERICANS DISLIKE: DENSITY  
AND SPRAWL.”

A new urbanist saying, quoted in Sustainable  
Urbanism: Urban Design with Nature, by Douglas  
Farr (2008)

## Some of the **Fastest Growing** Segments of U.S. Population Strongly Prefer **Compact Development**

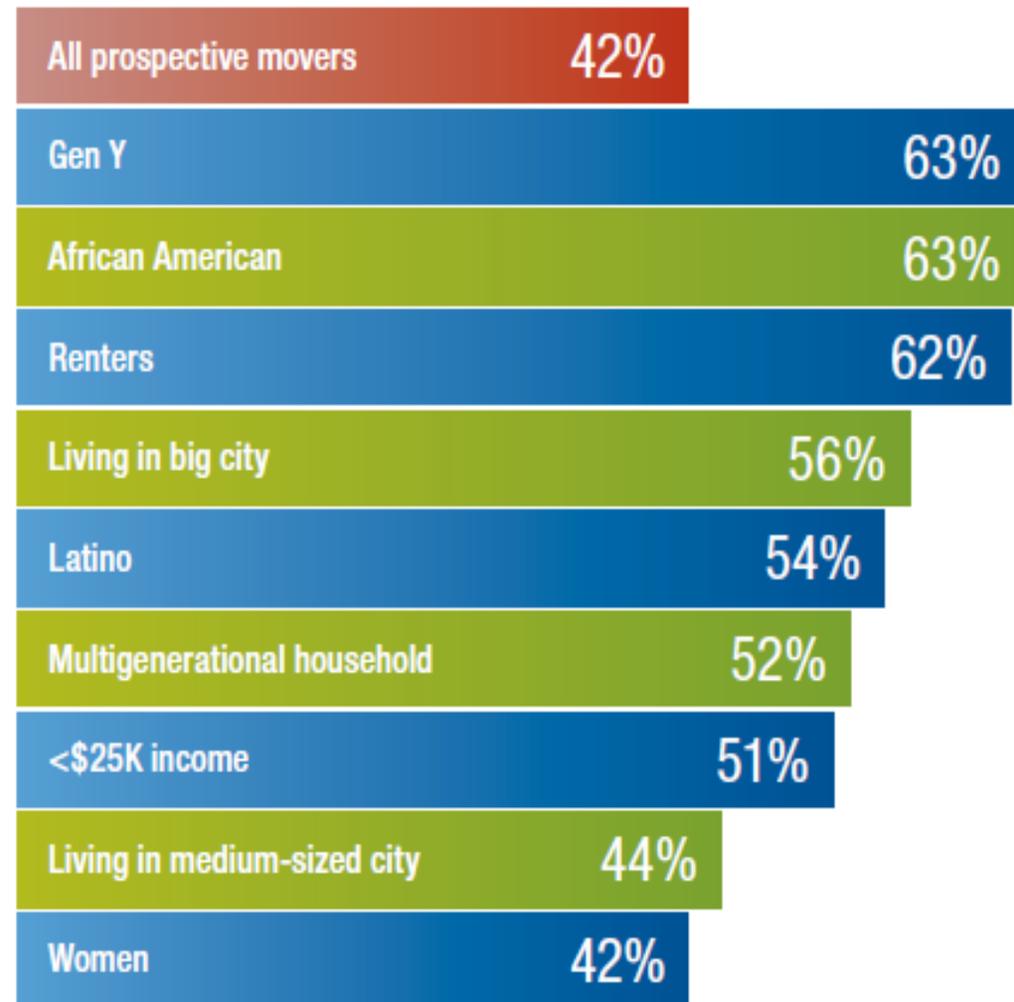
*Percentage Preferring Three or More Compact Development Attributes*

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%

**BIG QUESTION #1**  
**Who is planning to move?**

**BIG QUESTION #2**  
**What choices will movers make about community and housing?**

*Percentage Likely to Move in the Next Five Years*



*Percentage of Movers Indicating a Preference for These Community Attributes*



**42% of all adults surveyed plan to move in the next five years. Likely movers seek compact development attributes too.**

## Silent Generation/War Babies (35 m)

- Born before 1931, and between 1932 – 1946.
- Predominantly female
- Lowest incomes
- Lives alone
  
- *Most likely to...*
- Stay in their current homes.
- Want to live in walkable neighborhoods.
- Want to be close to health services, friends and family, shopping and entertainment

## Baby Boomers (73 million)

- Born 1947 – 1965.
- Higher incomes
- Well educated
- Most divorced of the generations
  
- *Most likely to...*
- Live in a single-family home.
- Prefer a shorter commute and smaller home

## Gen X (55 million)

- Born 1966 – 1978.
- Highly educated
- Most married of the generations
- Highest income
  
- *Most likely to...*
- Live in a single-family home.
- Drive nearly every day.
- Have children under 18

## Gen Y (Millennials) (72 million)

- Born 1979 – 1995.
- Ethnically diverse
- Lower income
  
- *Most likely to...*
- Live in rental housing and seek diverse housing types.
- Bit dissatisfied with where they live currently.
- Move within the next five years.
- Move to a walkable community with public transit options.

# So how do the different generations feel about compact development?

## Community Attribute Preferences, by Generation

Percentage preferring to live in a community with these attributes

	All adults	Gen Y	Gen X	Baby boomers	War babies/silent generation
Shorter commute/smaller home	61	54	54	72	65
Proximity to mix of shops, restaurants, and offices	53	62	50	49	51
Mix of incomes	52	52	53	53	47
Public transportation options	51	55	45	52	48
Mix of homes	48	59	47	42	44
<i>Percentage choosing three or more of these compact development attributes</i>	<b>54</b>	<i>59</i>	<i>49</i>	<i>57</i>	<i>51</i>

## What's Next?

- The Survey will be repeated in 2015 with a new report and data analysis.
- For more information about the ULI Survey, America in 2013: <http://www.uli.org.communitysurvey>
- With thanks to Lynn Ross, Executive Director of the ULI Terwilliger Center for Housing, and Michelle McDonough Winters, Senior Visiting Fellow at the ULI Terwilliger Center for Housing, for many of the slides used in this presentation.

