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Webinar, Part I: Americans' Views of Transportation and Livable Communities

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Community & Transportation Preferences Survey

Webinar: August 5, 2015



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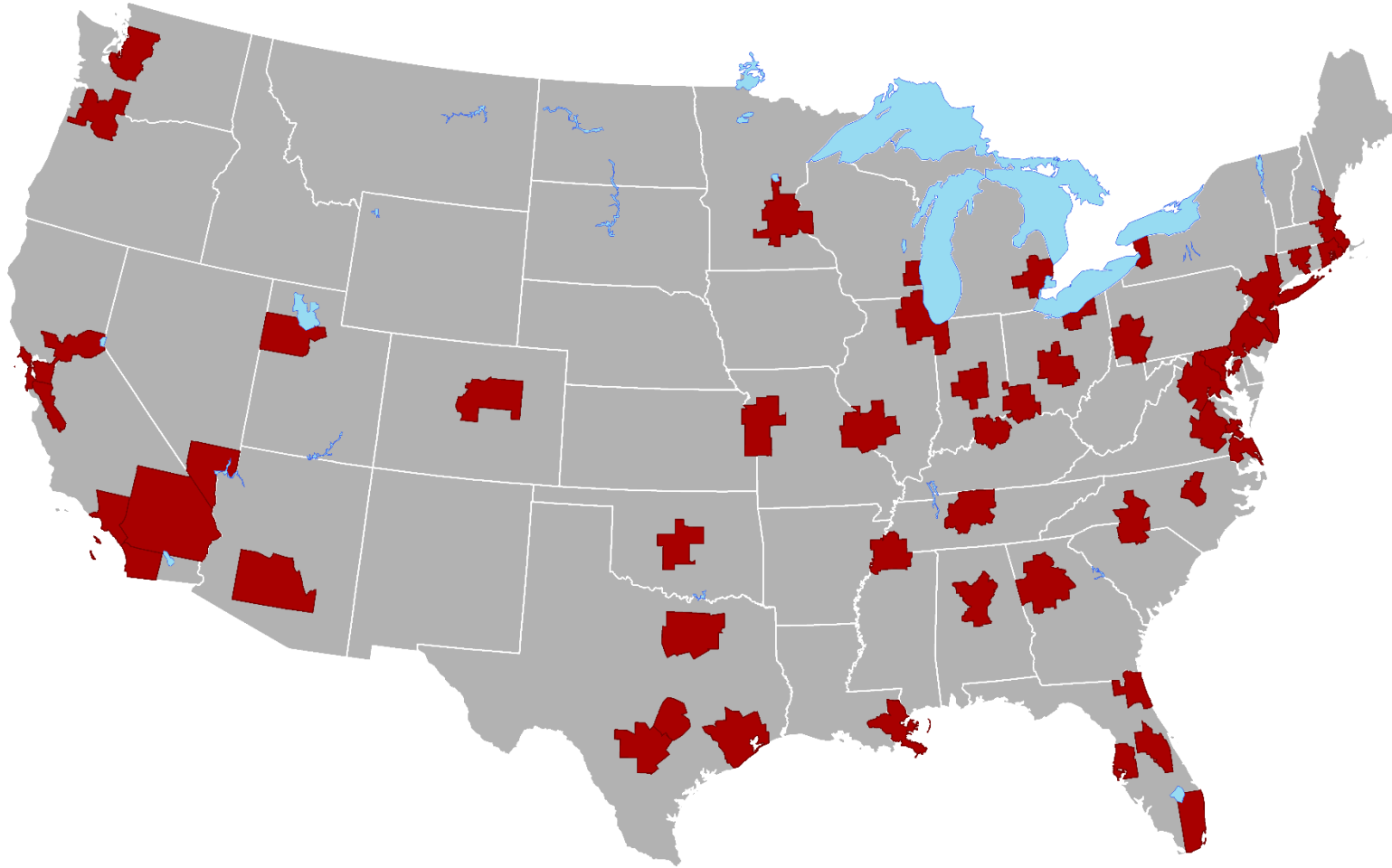
Introduction

- National Association of Realtors®
 - Over 1,000,000 members.
 - Started smart growth program 15 years ago.
 - Conduct national community preference poll every two years.
 - 2015 version joined forces with Portland State University
 - Larger sample
 - Insightful analysis
 - Previous polls available on www.Realtor.org, search for “Community”

Methodology: Summary

- The sample included adults living in the 50 largest metropolitan statistical areas (MSAs) in the U.S.
- The survey was conducted May 13-19, 2015.
- 1,000 respondents were interviewed by phone by American Strategies (679 by landline and 322 by wireless phone). Margin of error 3.1%
- 2,000 respondents were surveyed on-line by YouGov. Margin of error 2.2%
- Responses were weighted to better match demographics according to the American Community Survey and the two samples were combined.

Methodology: Metro Areas Sampled



Our Sample vs. ACS (Census) data

The survey sample is pretty similar to the population

		50 largest MSAs	Survey sample
HH Income (2013 3yr ACS)	Less Than \$15,000	11.7%	11.2%
	\$15,000 to less than \$50,000	31.7%	38.2%
	\$50,000 to less than \$75,000	17.5%	18.9%
	\$75,000 to less than \$100,000	12.2%	12.2%
	\$100,000 to less than \$150,000	14.4%	10.6%
	\$150,000 or more	12.6%	8.9%
Gender (2013 ACS 5yr)	Male	49.0%	47.6%
	Female	51.0%	52.4%
Age (2013 ACS 5yr)	18 to 24 years	12.6%	10.9%
	25 to 34 years	18.7%	17.0%
	35 to 44 years	18.2%	17.3%
	45 to 54 years	19.1%	17.9%
	55 to 64 years	15.2%	19.3%
	65 to 74 years	8.8%	11.1%
	75 or older	7.3%	6.5%
Education - 25 years and over (2013 ACS 5yr)	Did not complete high school	13.6%	6.3%
	High school graduate (includes equivalency)	25.0%	29.1%
	Some college or Associates	28.0%	30.0%
	Bachelor's degree	20.7%	21.3%
	Graduate or professional degree	12.7%	11.9%

Findings: Everyday travel

How often are people walking, bicycling, and taking transit?

What do they think about these travel modes?

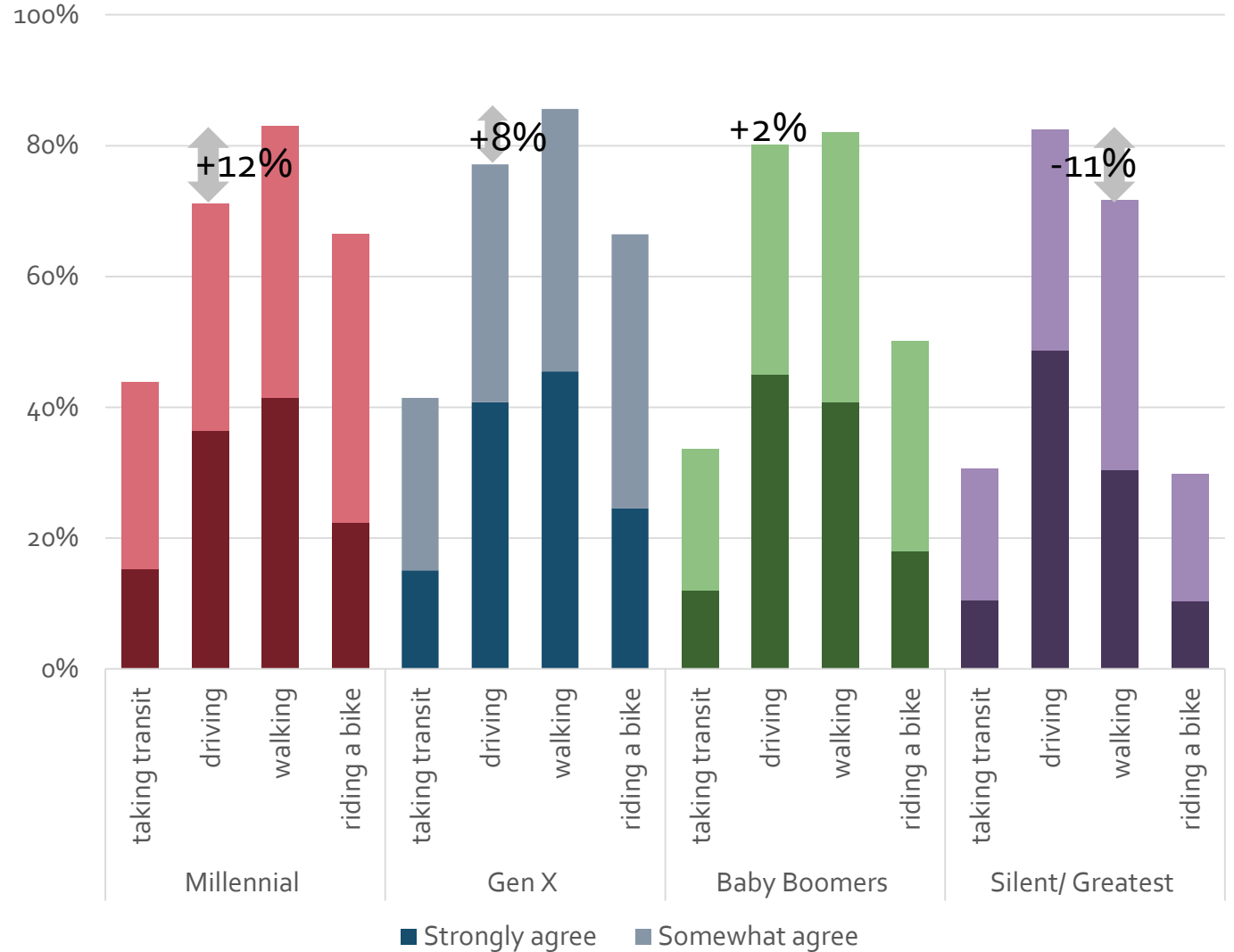
Why do they walk/bike/take transit and why not?

“I like walking”

Attitudes are an important determinant of people’s travel behavior.

Of all four modes, walking was liked the most. But, while everyone likes walking, Millennials like it 12 percentage points higher than driving (83% agree that they like walking vs. 71% like driving). This is the largest gap of any generation.

Q27-32. Now, I’d like to ask about your preferences regarding your daily travel. For each statement, please tell me if you strongly disagree, somewhat disagree, somewhat agree, or strongly agree. I like...

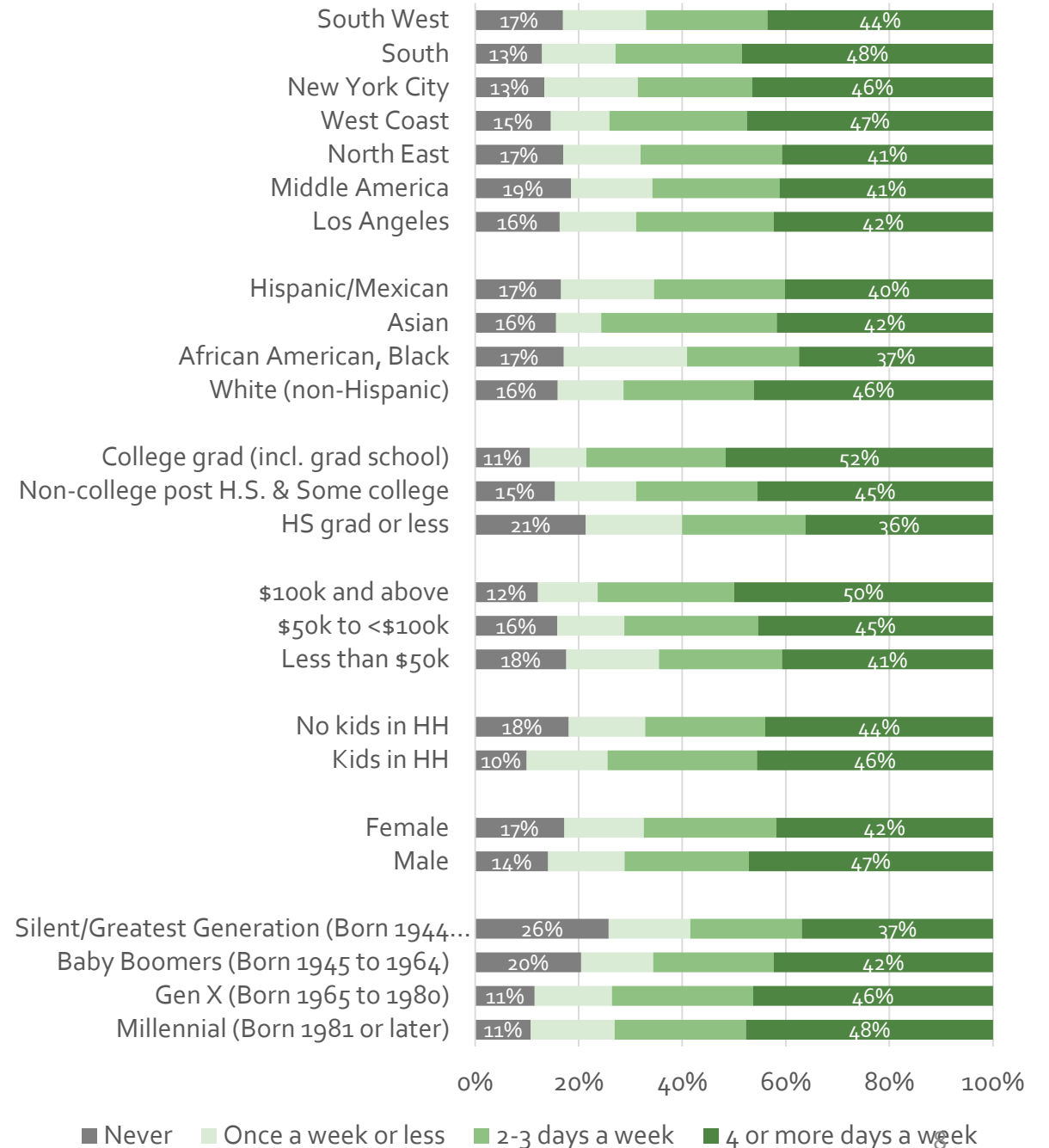


Walking in the past 30 days

Millennials walked an average of 13.3 days in the past 30 days, the highest of any generation (though not significantly higher than Gen X).

Walking frequency increases with income and education.

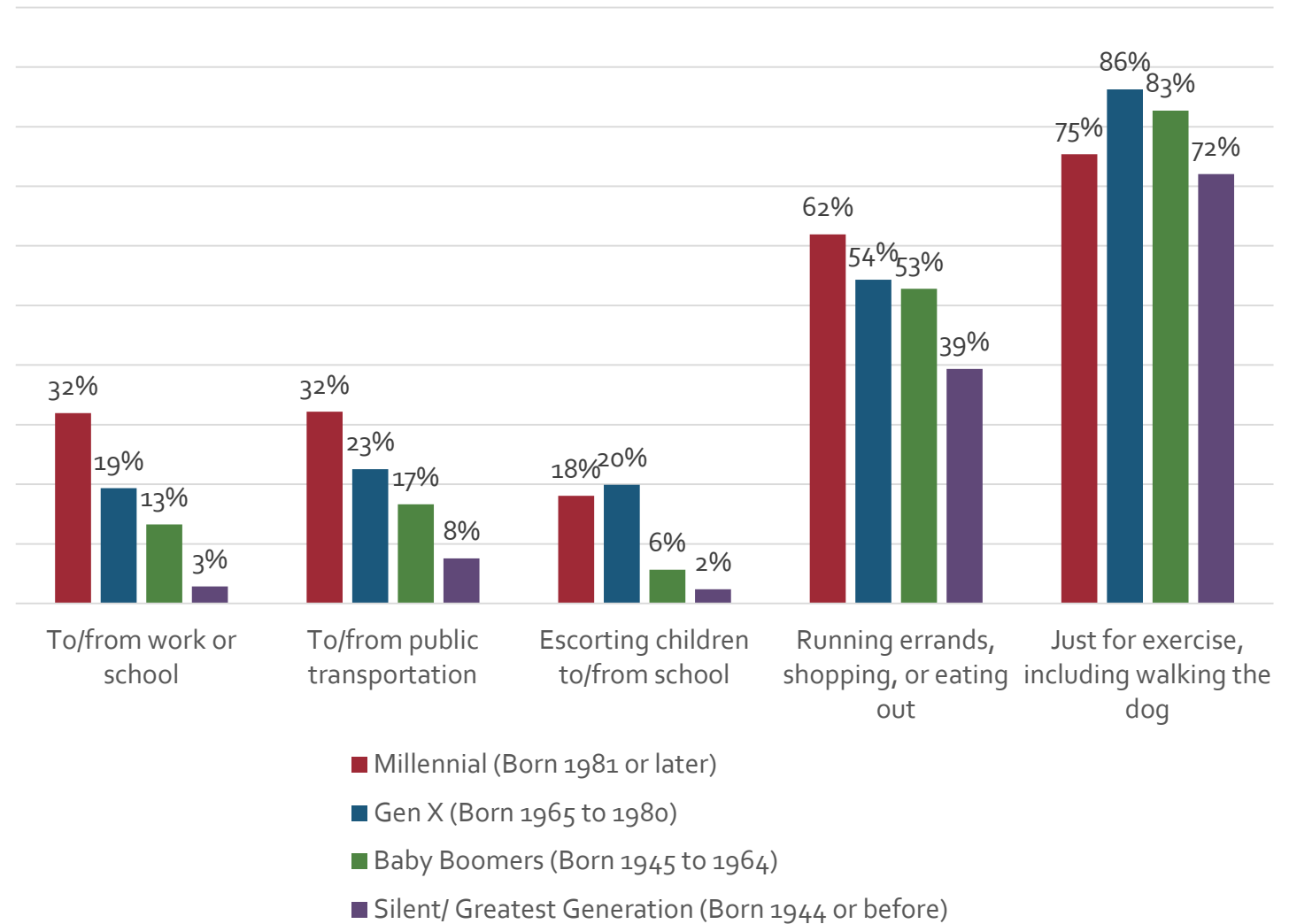
Q51. In the past 30 days, how many days did you take a walk outside for more than 10 minutes including walking the dog and walks for exercise?
0=Never; 1-4=Once a week or less; 5-15=2-3 days a week;
16+ = 4 or more days a week



Millennials are most likely to walk for transportation

Over 30% of Millennials reported walking to or from work/school in the past 30 days, compared to less than 20% of Gen Xers or Baby Boomers. Over 60% of Millennials reported walking for errands, shopping or eating out.

Gen Xers and Baby Boomers were more likely than Millennials to walk for exercise.



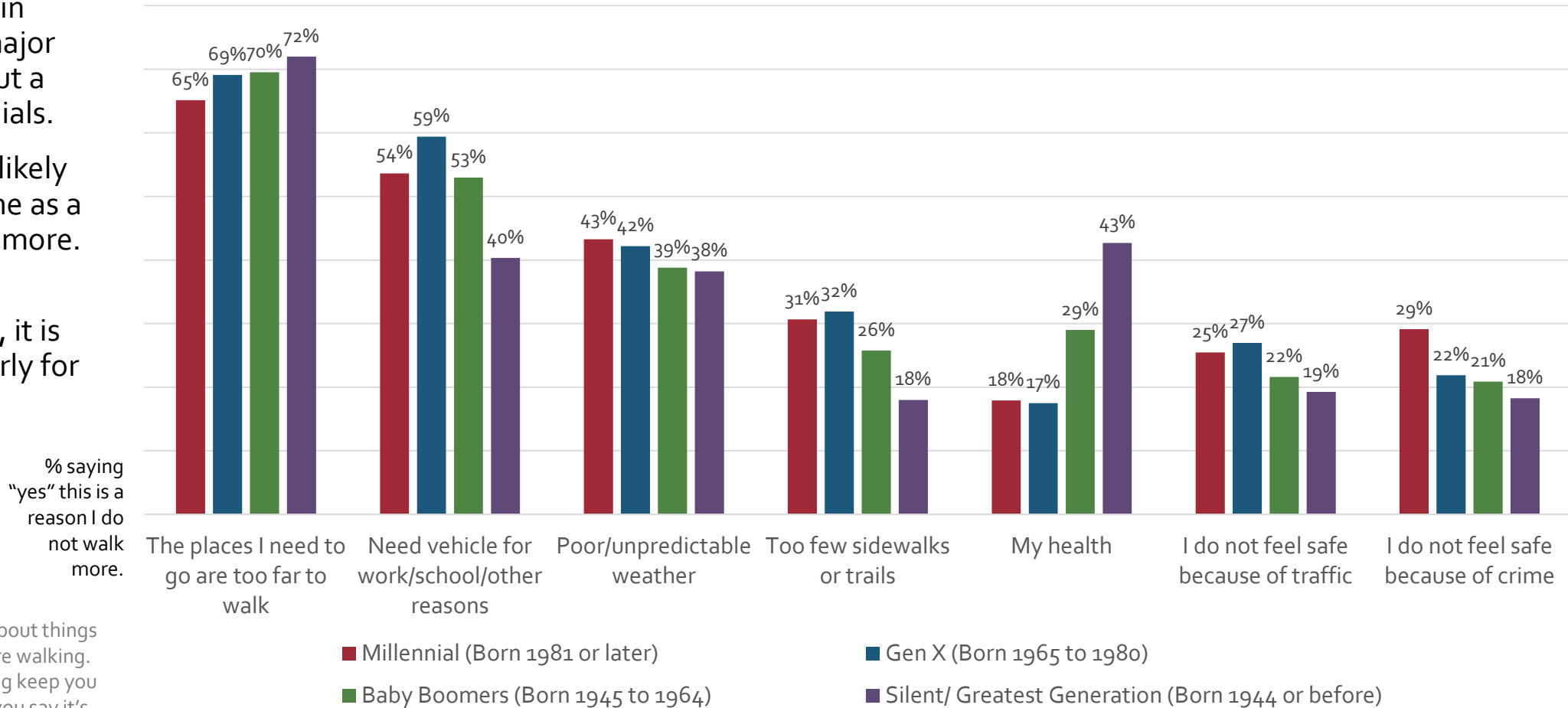
Q52-56. Were any of these walks you took...

Reasons for not walking more: Neighborhood design is important

Not having places within walking distance is a major barrier for everyone, but a little less so for Millennials.

Millennials were more likely to cite safety from crime as a reason for not walking more.

While health is a major motivation for walking, it is also a barrier, particularly for the oldest generation.



Q63-69. Now I'd like you to think about things that may keep you from doing more walking. Please tell me if any of the following keep you from doing more walking? Would you say it's because...

Biking in the past 30 days

72% stated they were physically able to ride a bicycle and knew how. Of those, 24% rode a bicycle in the past 30 days. Most of those people only rode for exercise, and not to go to work, errands, or other transportation purposes.

Gen Xers were the most likely generation to ride, though Millennials were the most likely to have ridden for transportation.

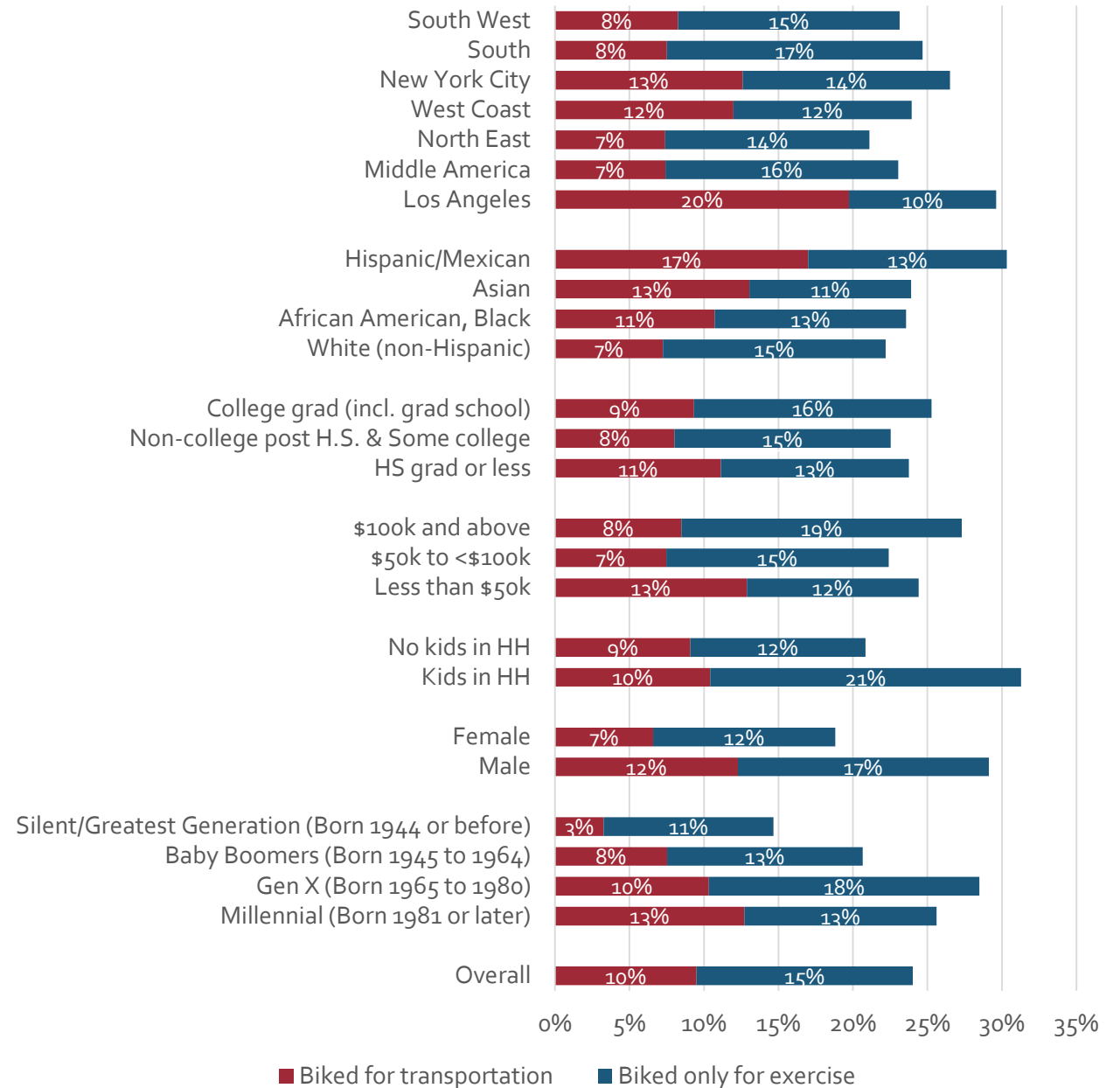
People with kids were more likely to ride only for exercise.

Q72. In the past 30 days, about how many days did you ride a bicycle outside including bicycling for exercise?

(Asked if able to ride bicycle and know how in bike or if physical limitation was a temporary condition)

Note: People who biked for transportation (red in the graph) may also have biked for exercise.

Biked in the past 30 days (of those physically able to)



What keeps people from biking more

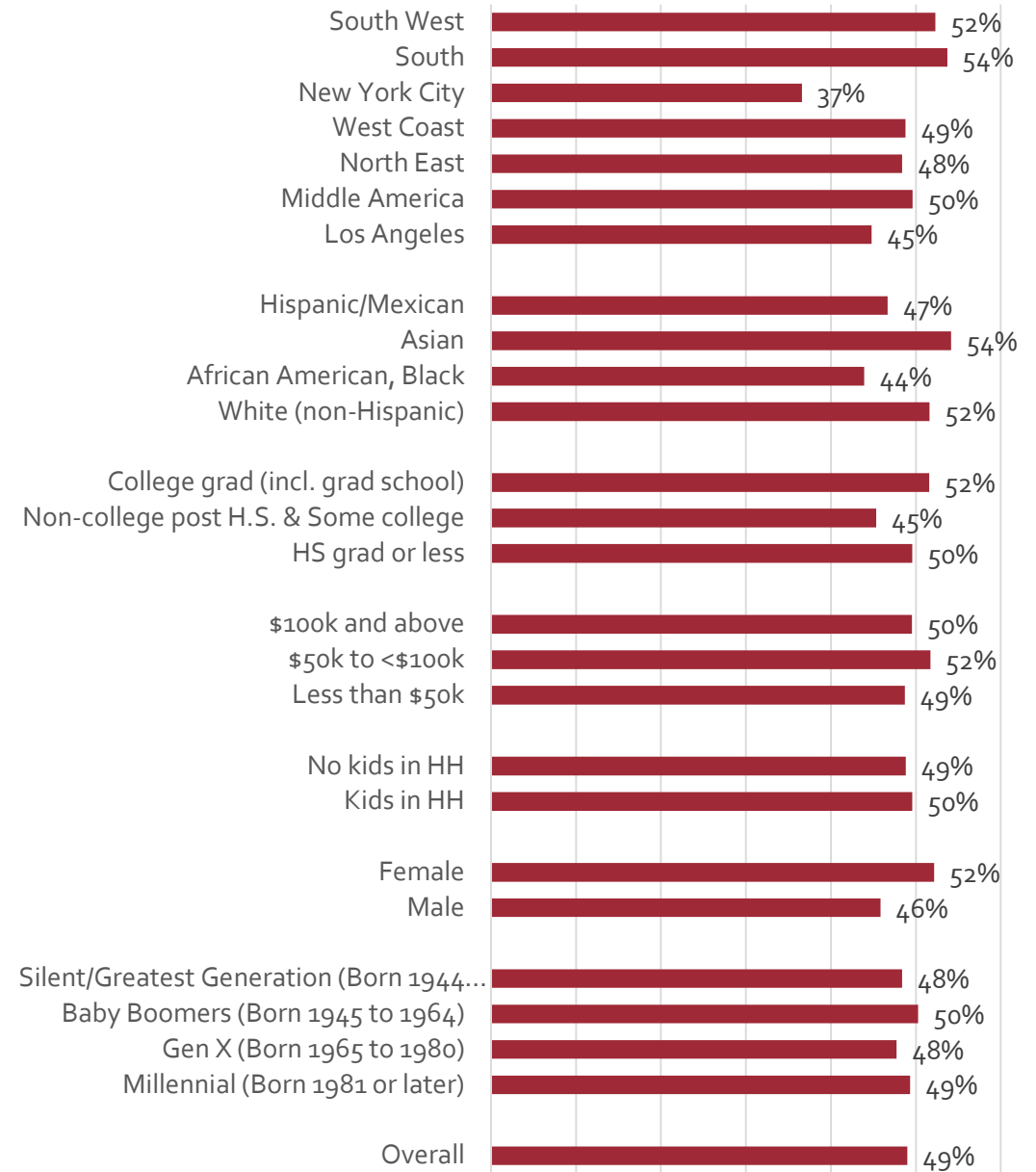
	Overall %
Need vehicle for work/school/other reasons	51%
The places I need to go are too far to bike	49%
I do not have a bike to ride	47%
I do not feel safe because of traffic	41%
Too few bike lanes or trails	38%
Poor/unpredictable weather	36%
I do not feel safe because of crime	18%
My health	12%

Reason for not biking: Places are too far away

About half of the adults say that the places they need to get to are too far away to bicycle. This is generally true for all the demographic groups, pointing to people's complex travel needs and current land use patterns that separate many destinations.

Q84 (If able to ride bicycle and know how in bike or temporary condition)
Now, I'd like you to think about things that may keep you from doing more biking. Please tell me yes OR no, if any of these keep you from doing more biking?

The places I need to go are too far to bike



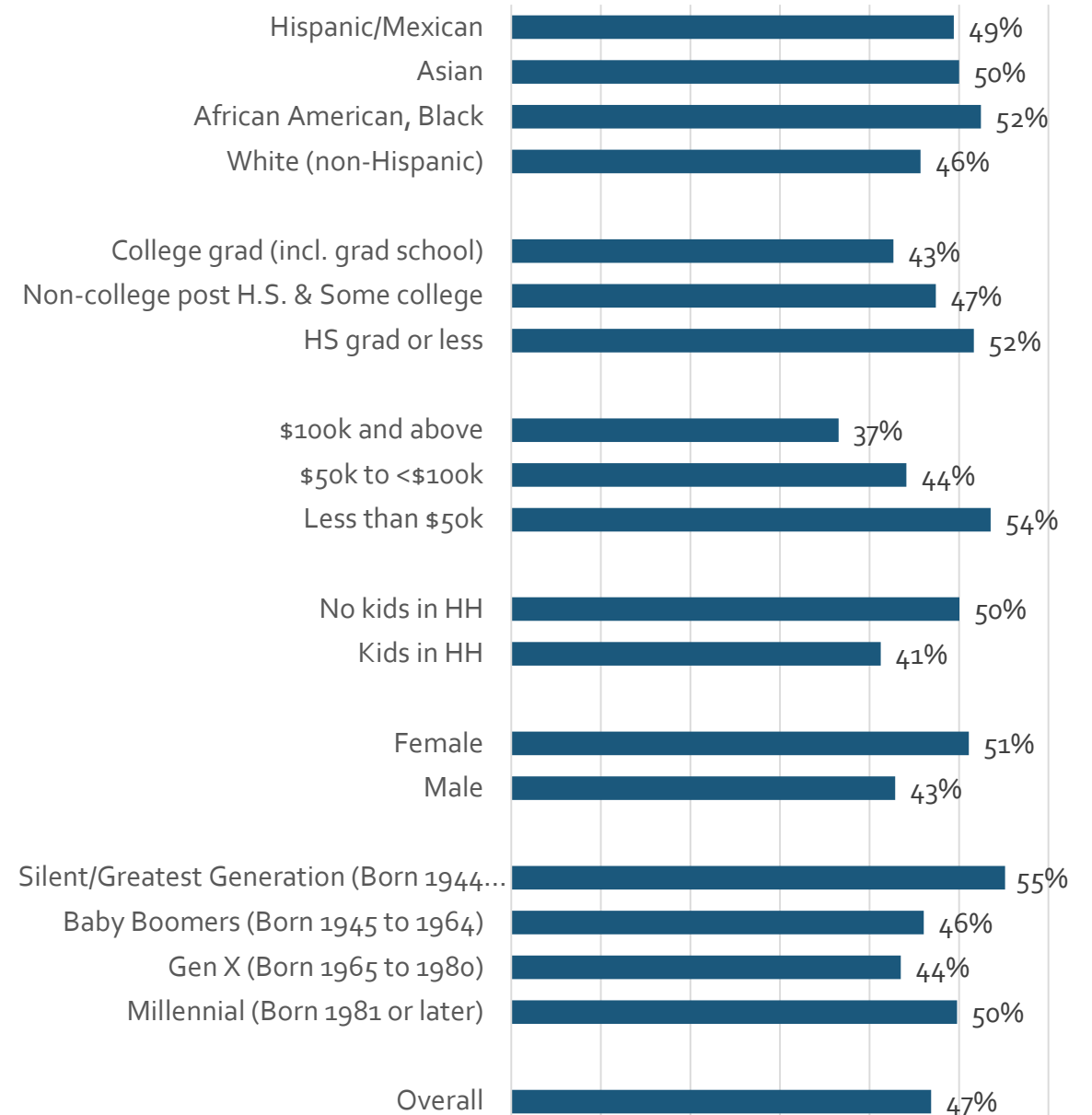
Reason for not biking: Don't have a bike

Just under half (47%) of the adults who are physically able to ride a bicycle cite not having a bike as a reason for not riding.

This is a barrier particularly for people with lower incomes and for women.

Q91 (If able to ride bicycle and know how in bike or temporary condition)
Now, I'd like you to think about things that may keep you from doing more biking. Please tell me yes OR no, if any of these keep you from doing more biking?

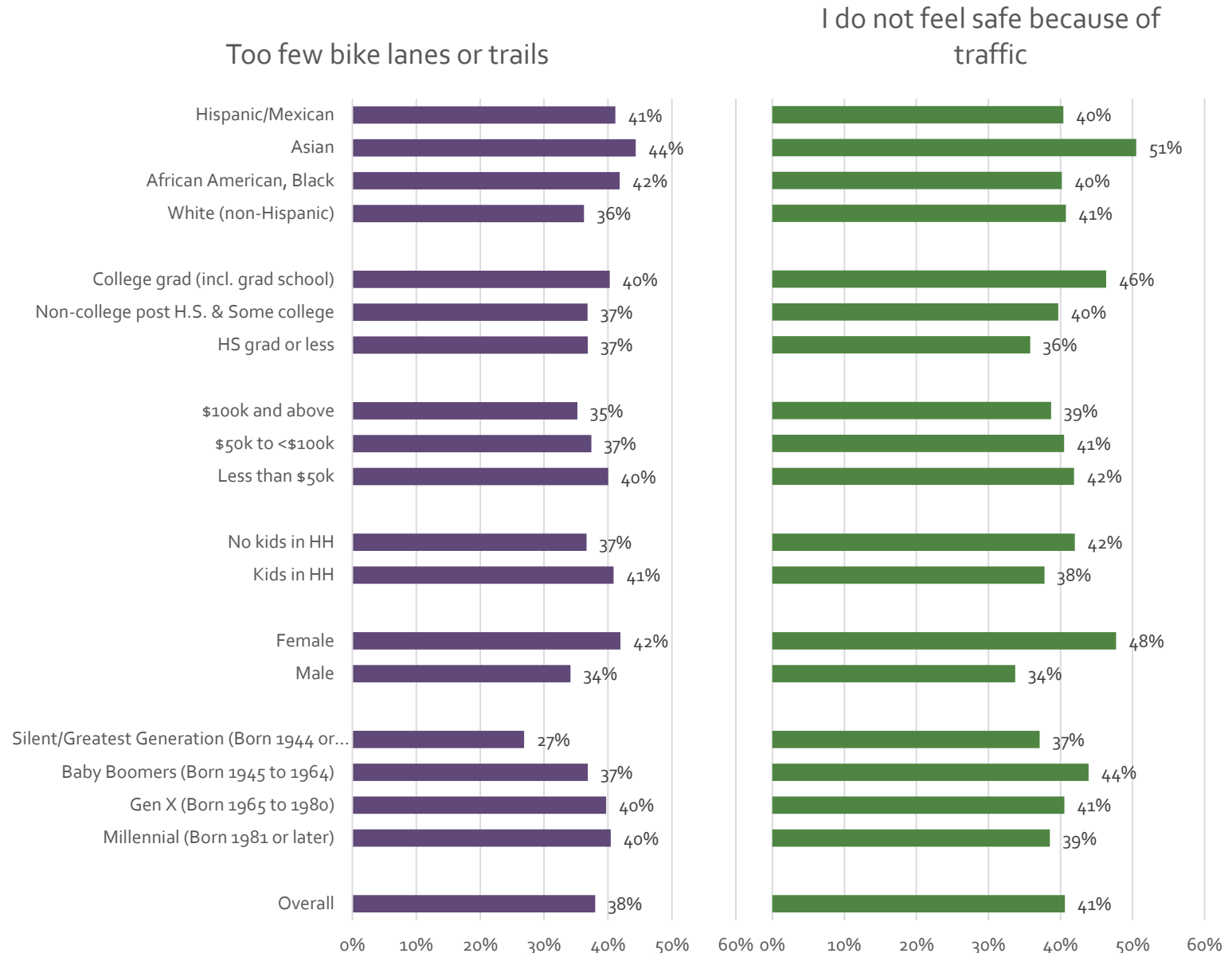
I do not have a bike to ride



Reason for not biking: Traffic and lack of bike lanes

Not feeling safe because of traffic was generally a bigger reason for not biking than the lack of bike lanes or trails. The responses were not always consistent for these two barriers within demographic groups, indicating that for some people bike lanes/trails may not address their concerns about traffic.

Q85, 89 (If able to ride bicycle and know how in bike or temporary condition) Now, I'd like you to think about things that may keep you from doing more biking. Please tell me yes OR no, if any of these keep you from doing more biking?



Findings: Transportation Policy Priorities

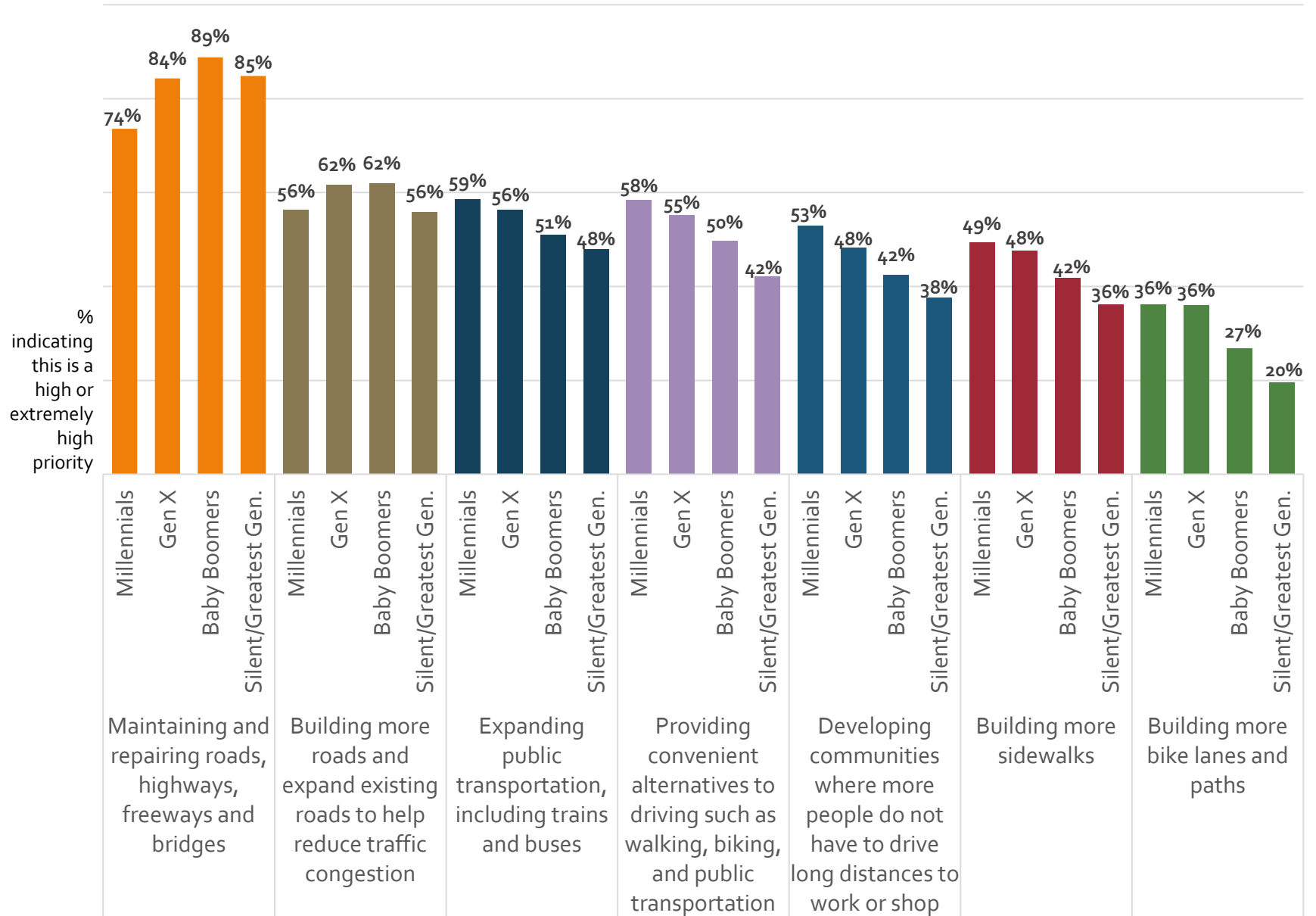
What are respondents' transportation priorities for the government?

Maintenance is the clear priority

Maintenance is the highest priority for all generations, though it is less so for millennials compared to the older generations

Millennials generally place higher priority on transit, walking, and bicycling as government priorities compared to the other generations

Q19-25 . Now, I'm going to read you a list, and I'd like you to tell me whether each of the following should be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for the government.



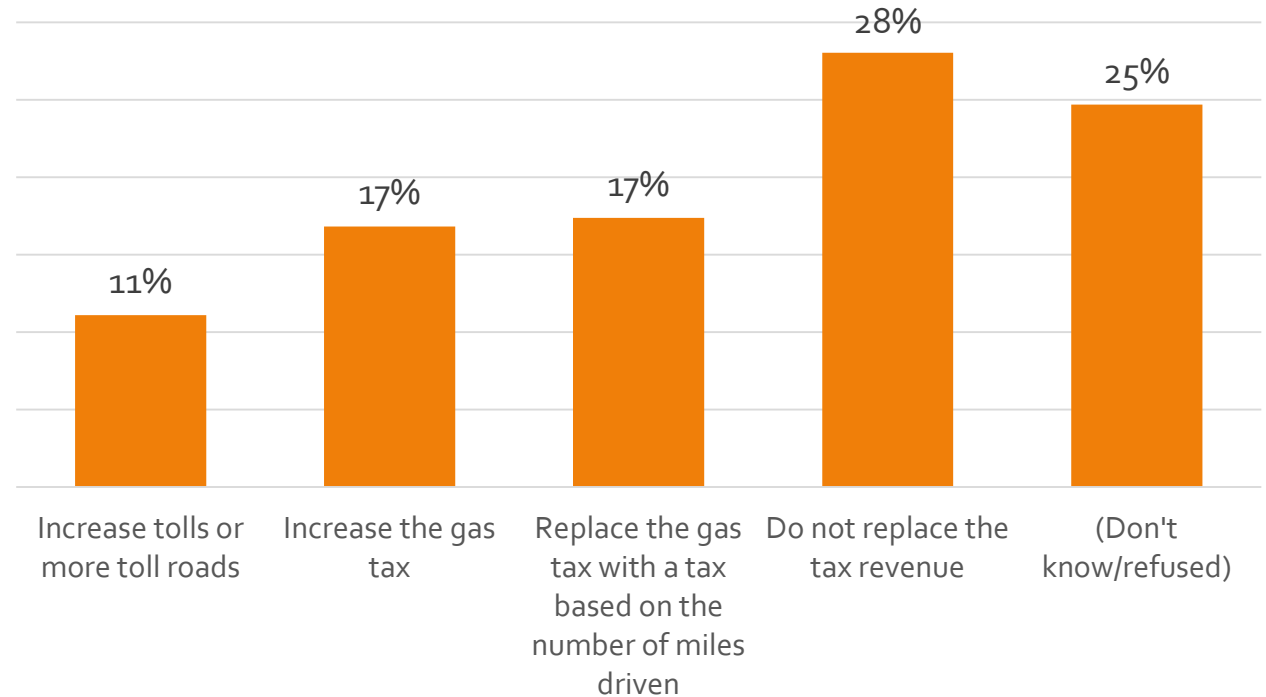
Most don't know how to replace shrinking gas tax revenue or don't want to

When asked how to replace shrinking gas tax revenues, 28% indicated that they preferred no replacement and 25% did not have an opinion.

Equal shares (17%) opted for increasing the gas tax or replacing it with a tax based on miles driven.

A similar question on the 2013 NAR Smart Growth Poll representing both urban and rural Americans had only 8% favoring increasing the gas tax, compared to 20% opting for the tax on miles driven. Equal shares (29%) chose no replacement or were undecided.

Q26 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?



Findings: Housing Preferences

What transportation features are important in deciding where to live?

Do people prefer more walkable neighborhoods?

People want transportation options

Important things when deciding where to live...	Important (very or somewhat)	Very Important
Sidewalks and places to take walks	85%	55%
Easy access to the highway	82%	42%
Being within an easy walk of other places and things in the community	79%	42%
Being within a short commute to work	76%	44%
Having public transit nearby	64%	37%
Bike lanes and paths nearby	57%	24%

Q10-16. If you were deciding today where to live, please indicate how important having each of the following is to you - is it very important, somewhat important, not very important, or not at all important.

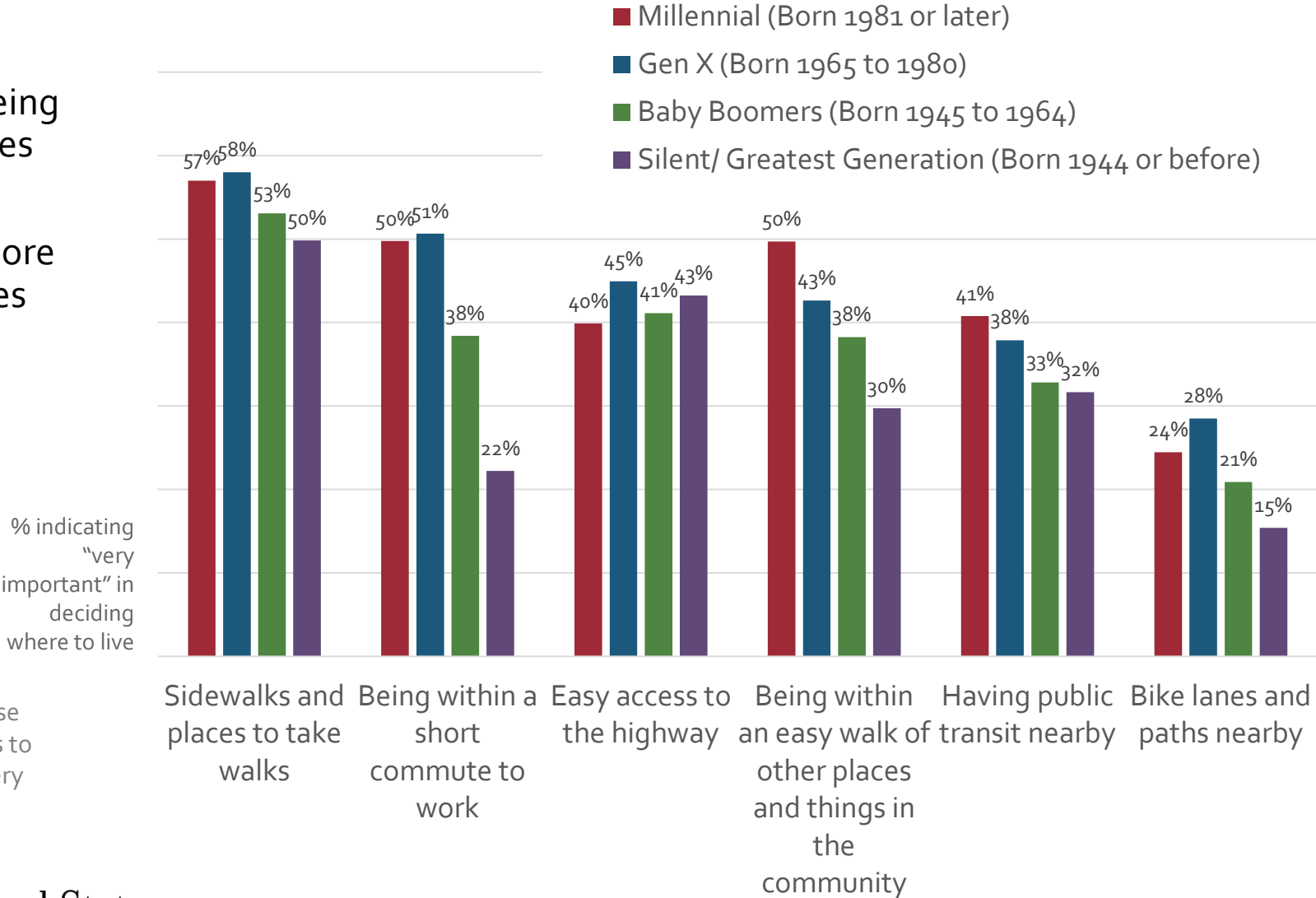
Trends over time

Important things when deciding where to live...	Important (very or somewhat)	NAR 2011
Sidewalks and places to take walks	85%	77%
Easy access to the highway	82%	72%
Being within an easy walk of other places and things in the community	79%	66%
Being within a short commute to work	76%	--
Having public transit nearby	64%	--
Bike lanes and paths nearby	57%	--

Some preferences vary by generation

Millennials are more interested in being within easy walking distance of places and having public transit nearby.

Both Millennials and Gen Xers are more interested in sidewalks and bike lanes and paths



Q10-16. If you were deciding today where to live, please indicate how important having each of the following is to you - is it very important, somewhat important, not very important, or not at all important.

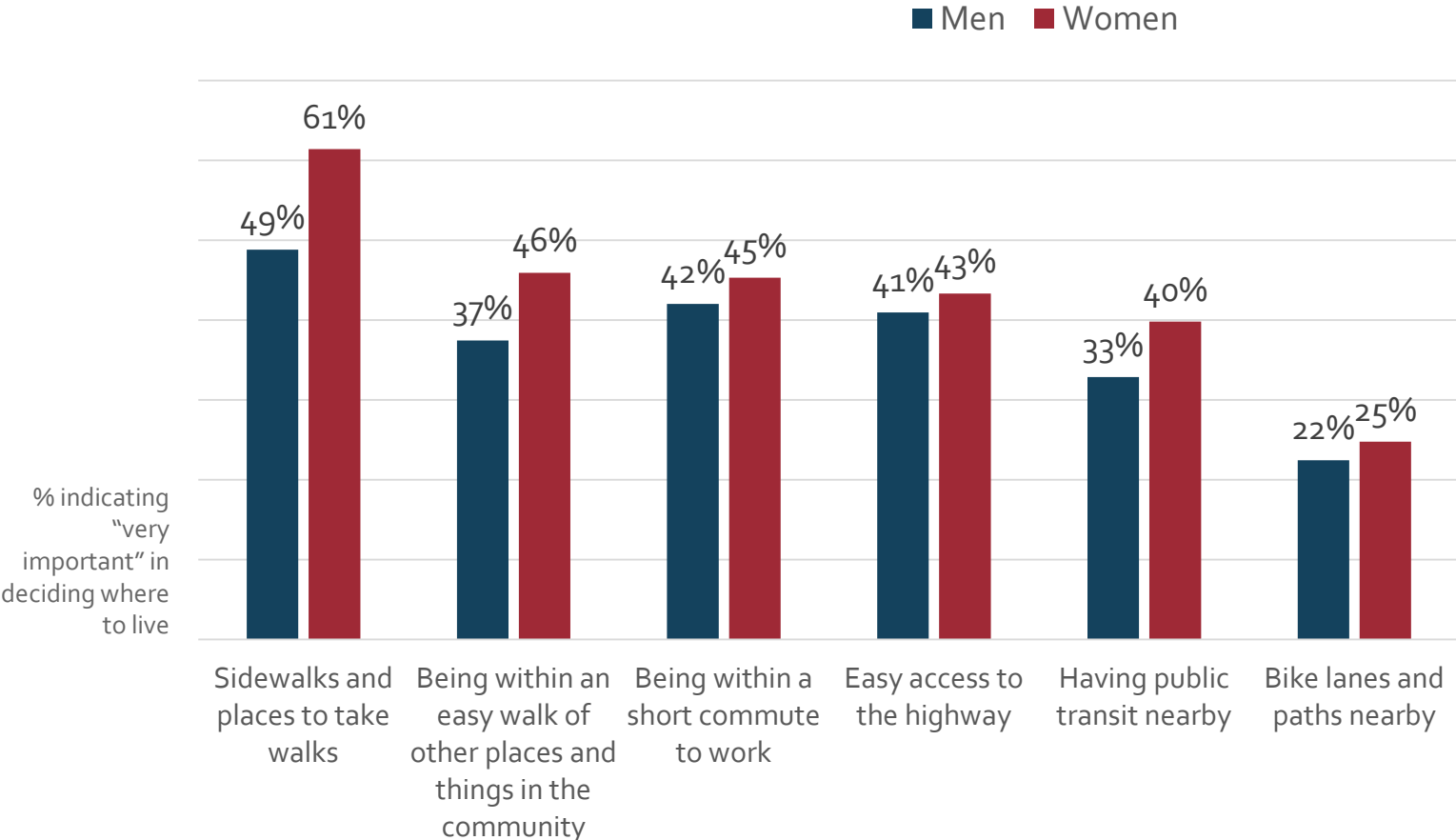
Women value walkability more than men do

A large majority (61%) of women indicated it was very important to have sidewalks and places to take walks when deciding where to live.

46% of women said it was very important to be within easy walking distance of places in the community.

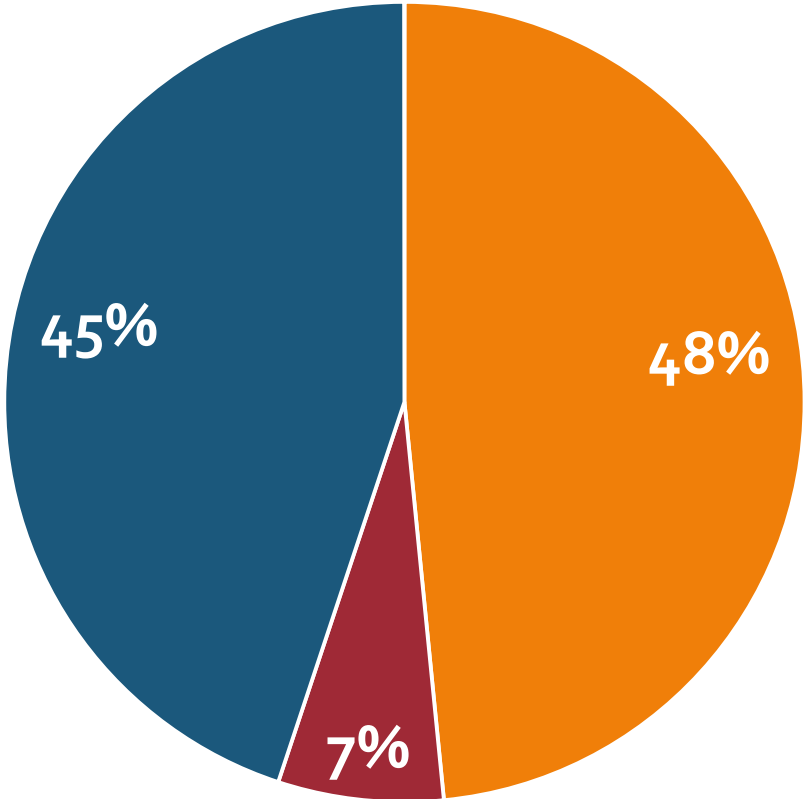
Having public transit nearby was also more important to women.

Q10-16. If you were deciding today where to live, please indicate how important having each of the following is to you - is it very important, somewhat important, not very important, or not at all important.



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

Preferred Community



Community A:
(conventional suburb)
Houses with large yards and you have to drive to the places you need to go.

Community B:
(walkable community)
Houses with small yards and it is easy to walk to the places you need to go.

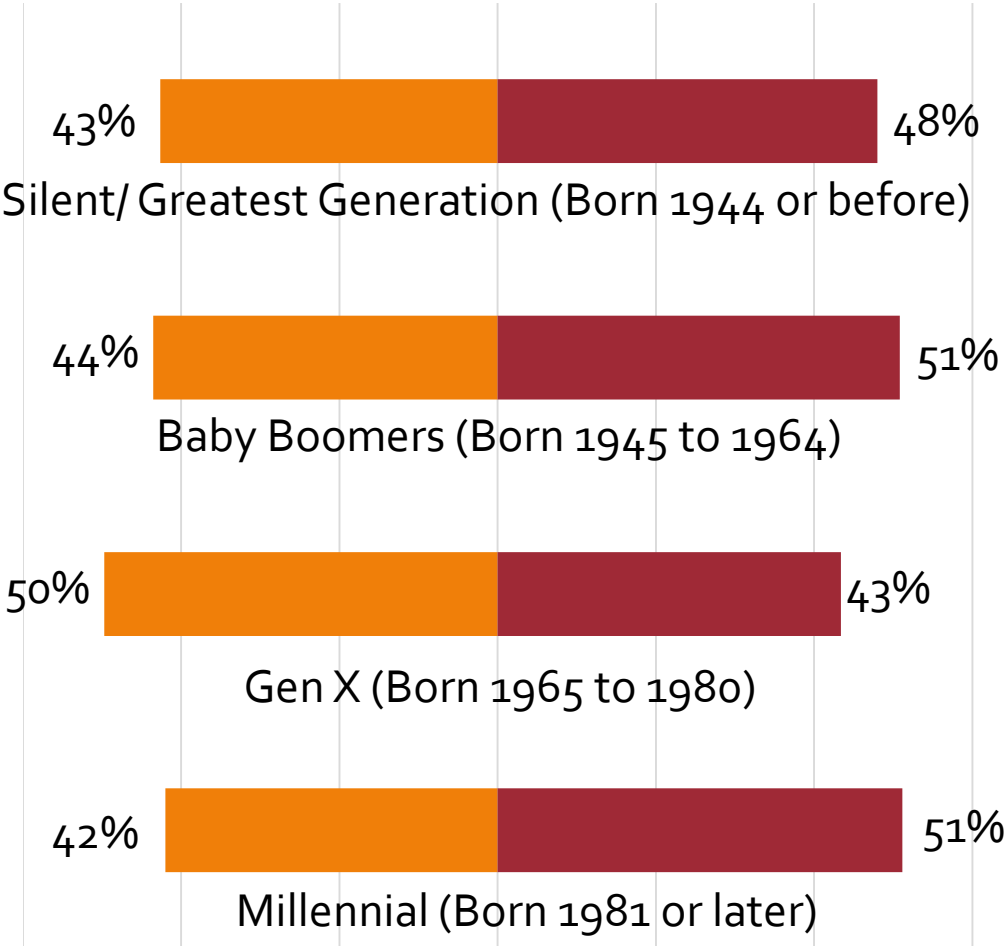
Q17. Imagine for a moment that you are moving to another community. These questions are about the kind of community where you would like to live. Please select the community where you would prefer to live.

Don't Know/Neither

Millennials and Baby Boomers prefer smaller yards in walkable neighborhoods

Community A:
(conventional suburb)
 Houses with large yards and you have to drive to the places you need to go.

Q17. Imagine for a moment that you are moving to another community. These questions are about the kind of community where you would like to live. Please select the community where you would prefer to live.

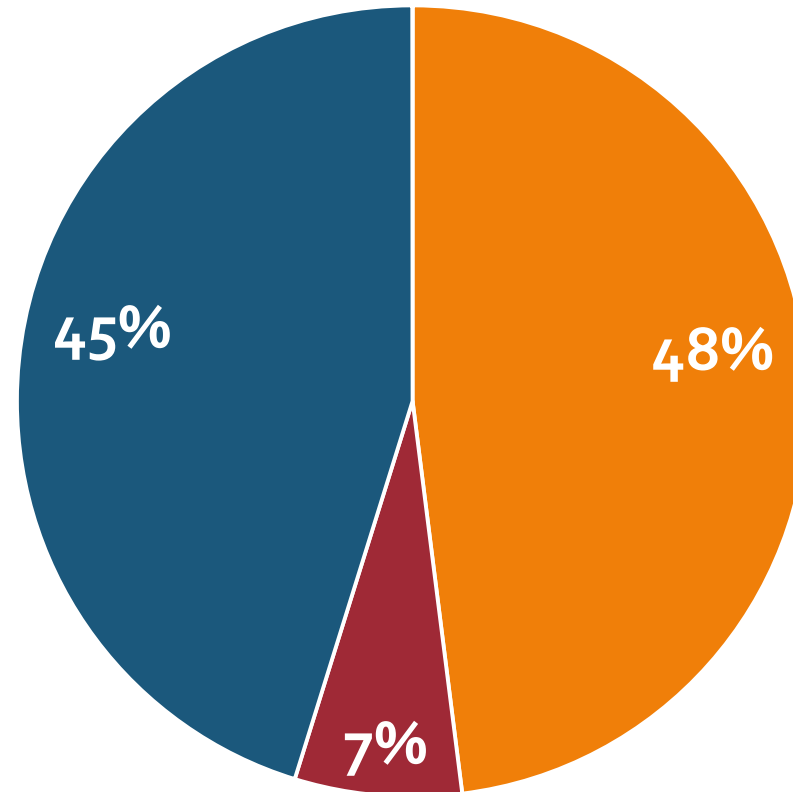


Community B:
(walkable community)
 Houses with small yards and it is easy to walk to the places you need to go.

Americans split between attached homes in walkable neighborhoods and detached homes in conventional neighborhoods

Preferred Community

Home A:
(attached, walkable)
Own/rent an apartment/townhouse, and you have an easy walk to shops/restaurants & have a shorter commute



Home B:
(detached, conventional)
Own/rent detached, single-family house, and you have to drive to shops, restaurants, & have a longer commute

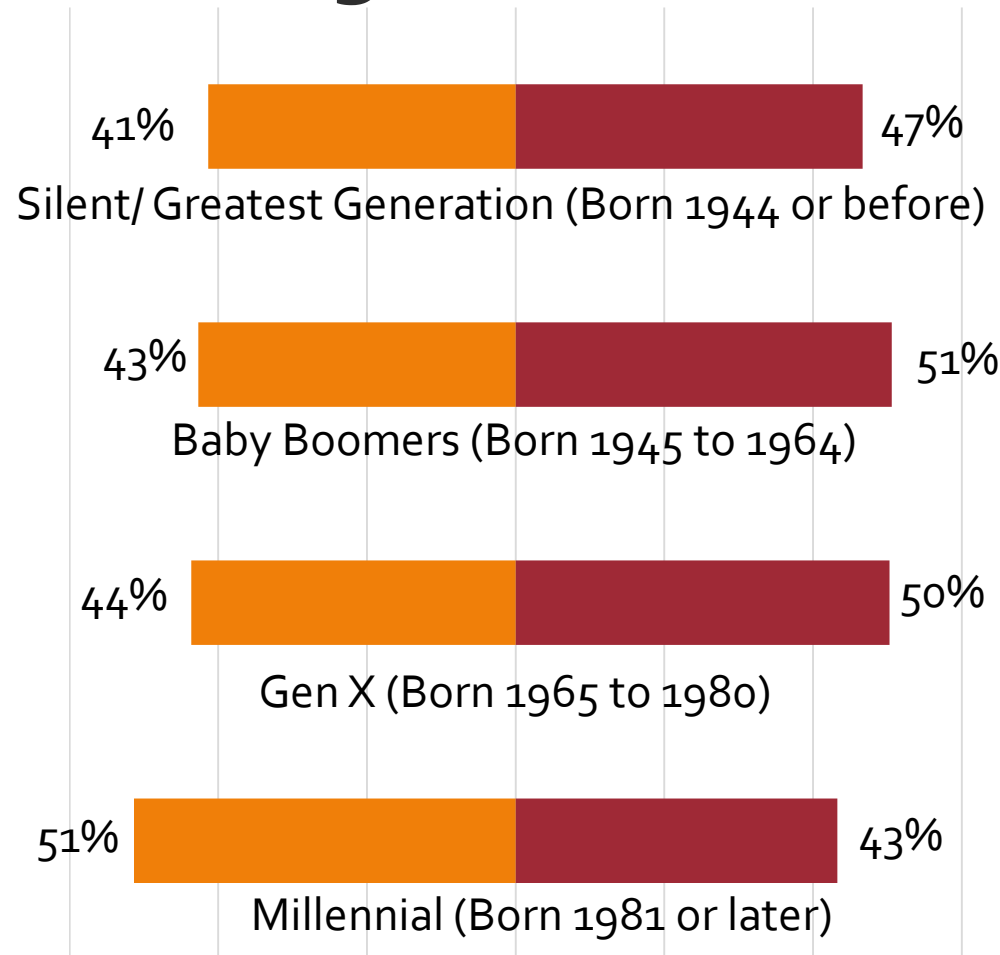
Q18. Imagine for a moment that you are moving to another community. These questions are about the kind of community where you would like to live. Please select the community where you would prefer to live.

Don't Know/Neither

Millennials prefer attached homes in walkable neighborhoods

Home A:
(attached, walkable)
 Own/rent an apartment/townhouse, and you have an easy walk to shops/restaurants & have a shorter commute

Home B:
(detached, conventional)
 Own/rent detached, single-family house, and you have to drive to shops, restaurants, & have a longer commute



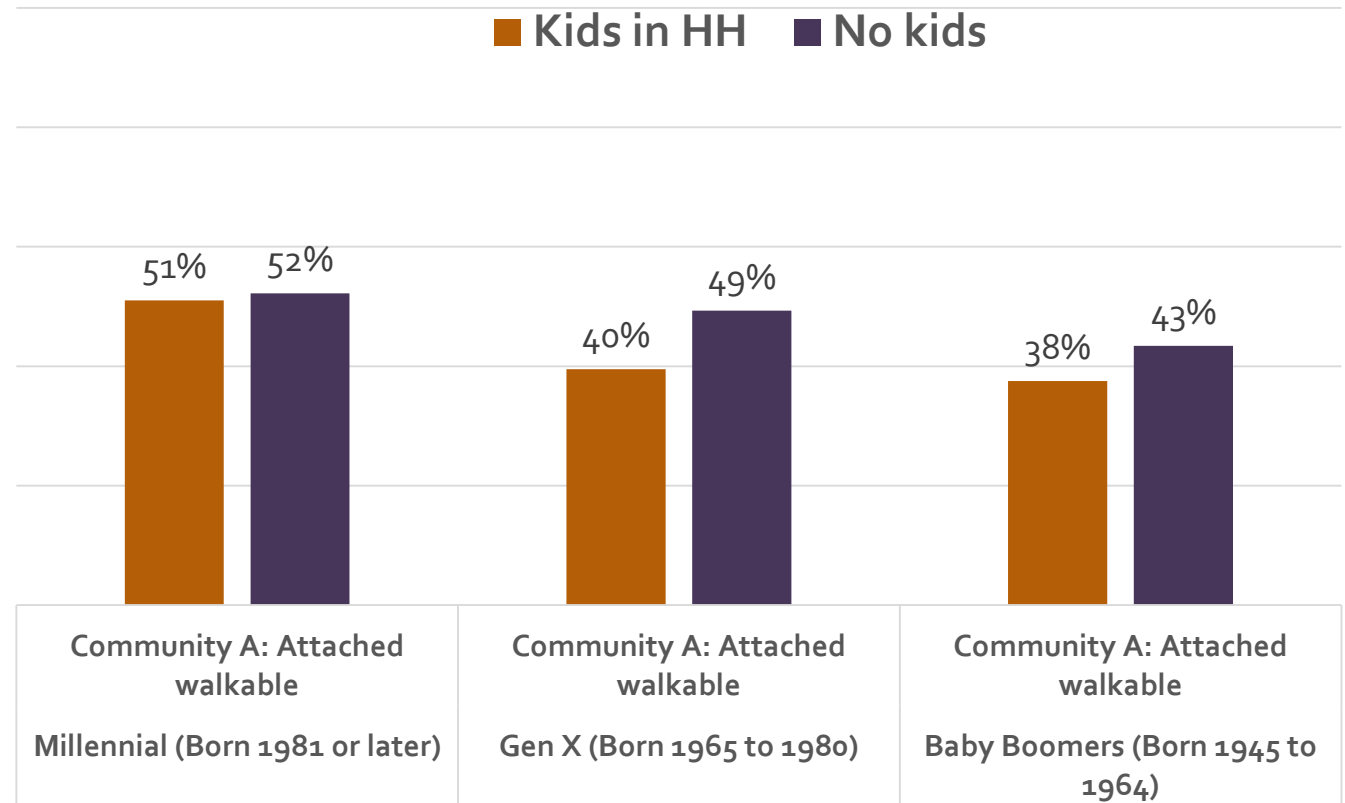
Q18. Imagine for a moment that you are moving to another community. These questions are about the kind of community where you would like to live. Please select the community where you would prefer to live.

What about households with kids?

For Millennials with kids in the household, there was no significant difference in the share that chose the attached home in a walkable location (vs. the detached home that required more driving). Over half chose that option.

For Gen Xers with kids, there is a difference. Only 40% of the Gen Xers with kids preferred the attached walkable option, compared to 49% of the Gen Xers without kids.

The difference for Baby Boomers with and without kids is not statistically significant.



Findings: Current home and neighborhood

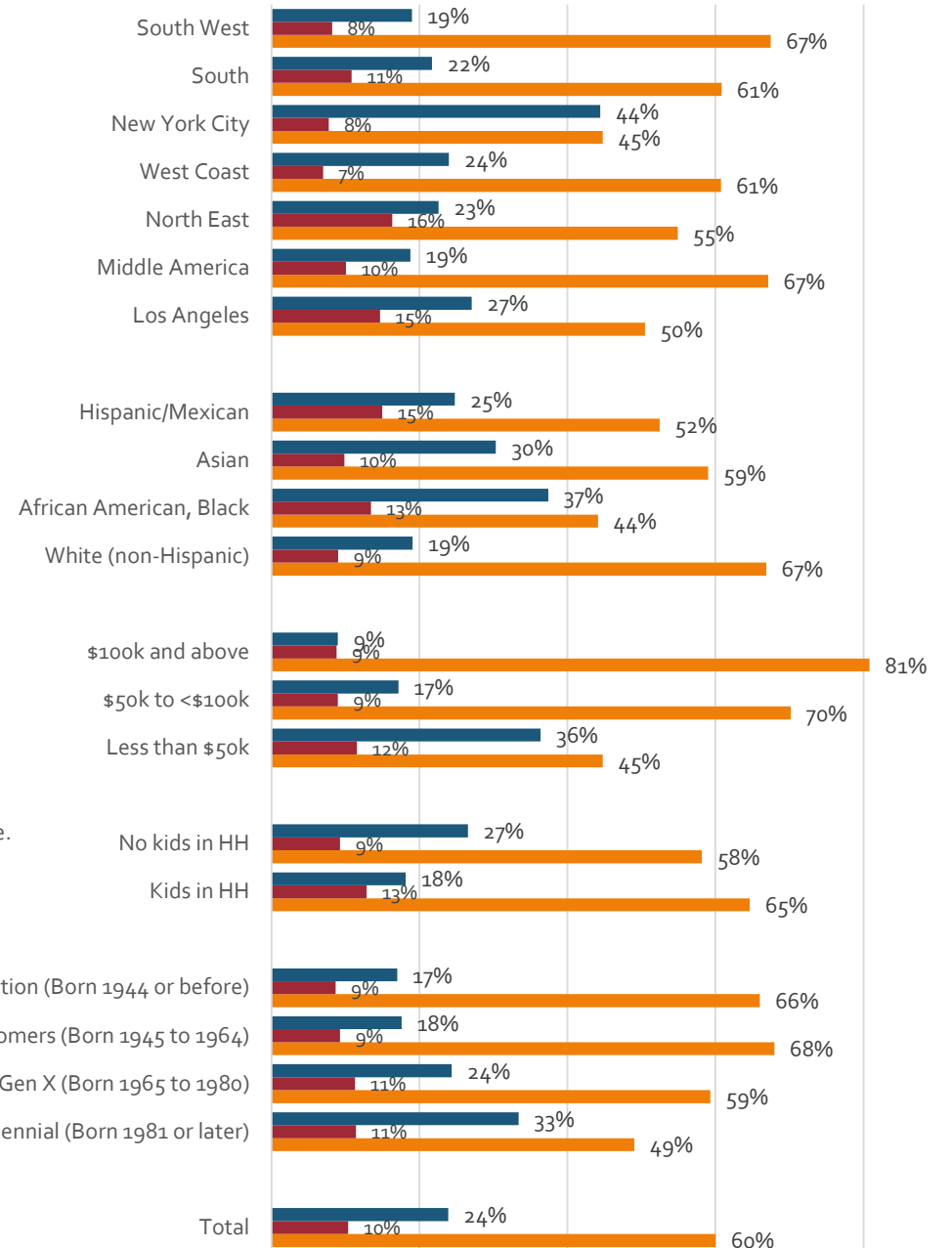
What is the transportation environment where people currently live?

How well does that match their preferences?

Most people live in detached homes

60% of the adults surveyed in the metro areas live in detached, single-family homes.

- A building with 2 or more apartments or condos
- Single family attached house, such as a townhouse or row house.
- Single family detached house



Q9. Do you live in a...

But, 25% live in detached homes and would prefer an attached home in a walkable neighborhood

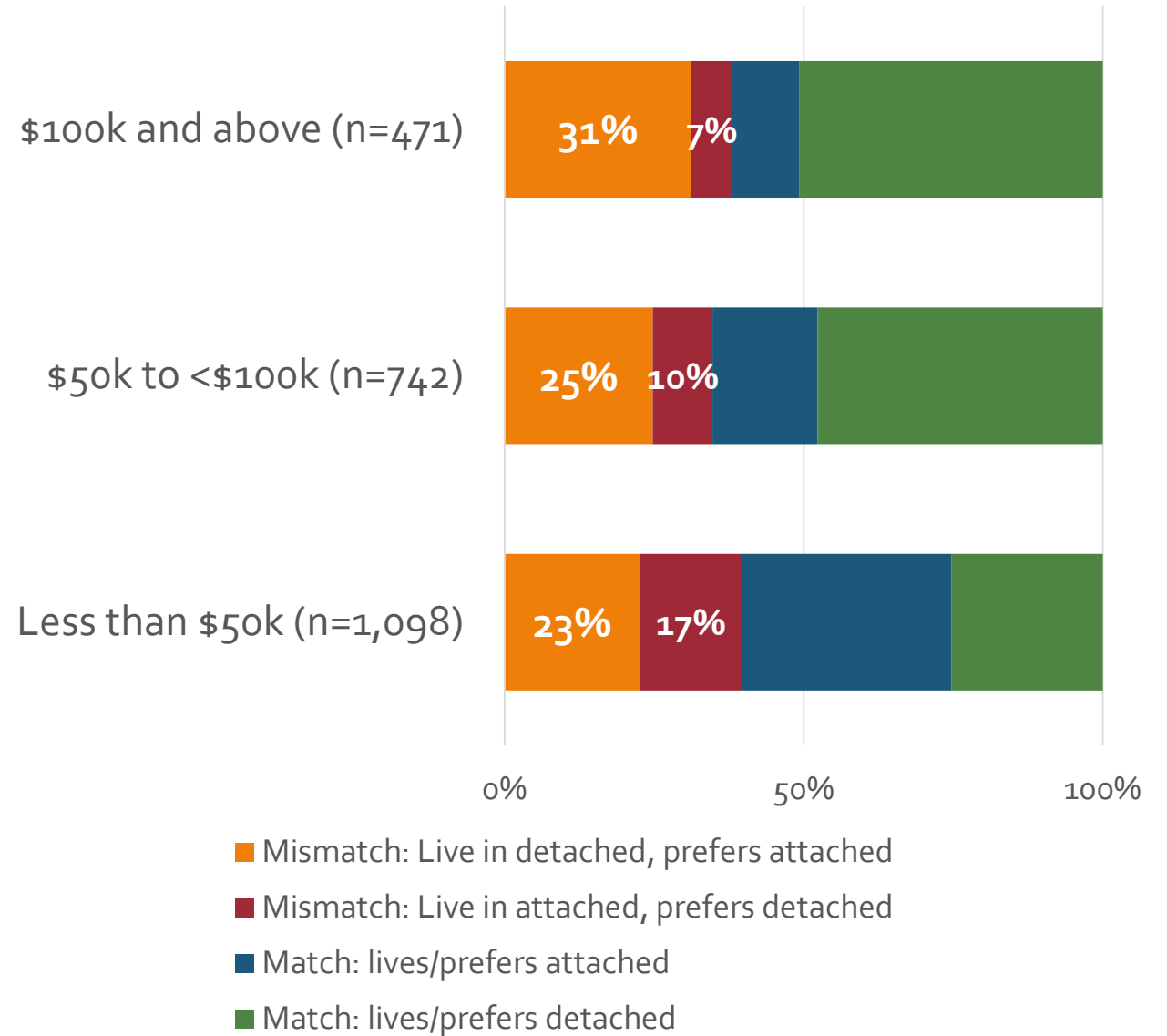
	Lives in	Prefers	%
Mismatched	Detached home	Apartment/townhouse in walkable neighborhood	25%
	Attached home	Detached home in conventional neighborhood	13%
Matched	Attached home	Apartment/townhouse in walkable neighborhood	24%
	Detached home	Detached home in conventional neighborhood	38%

n=2,655; Excludes people living in mobile homes and other housing types

Mismatch differs some by income

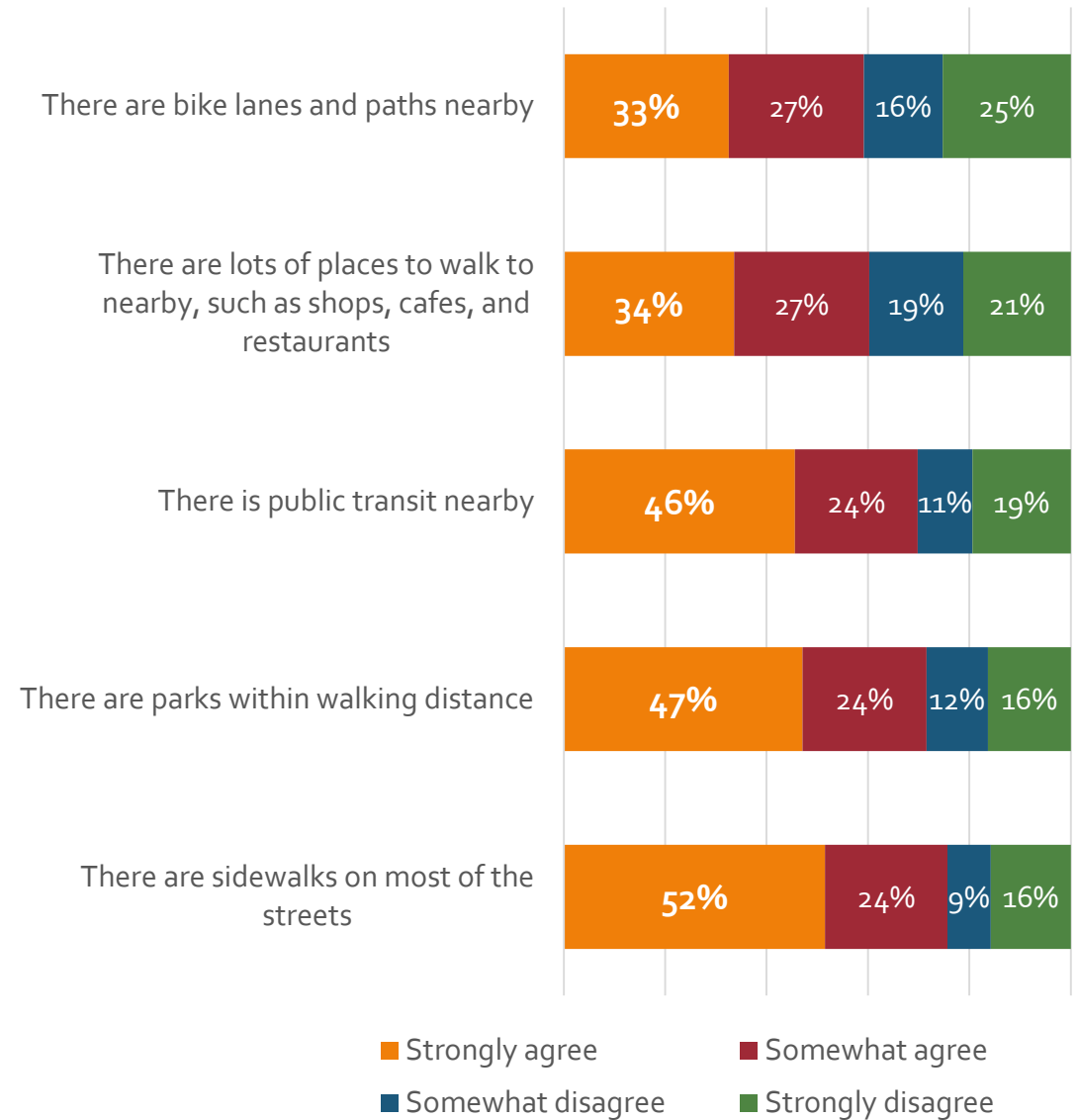
People in the highest income level (\$100k and above) are the most likely to be living in detached homes and prefer to live in an attached home in a walkable neighborhood.

On the other hand, 17% of people in the lowest income group live in an attached home and would prefer a detached home in a conventional neighborhood.



Most people have sidewalks available, but fewer have lots of places to walk to nearby, such as shops, cafes, and restaurants.

Only one-third of people strongly agreed that there are bike lanes and paths nearby.

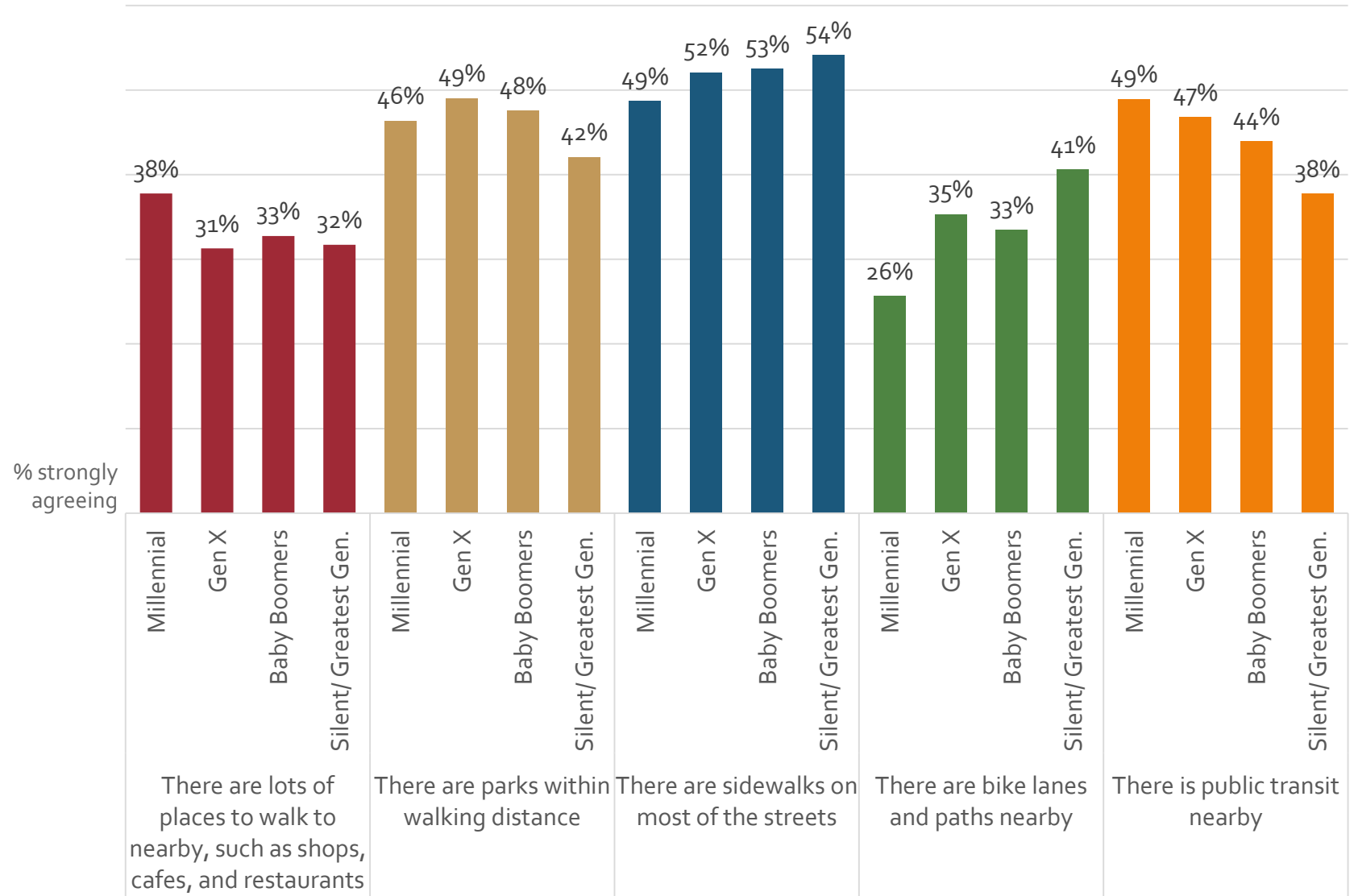


Q4 -8. Now, I have a few questions about your neighborhood and home. For each, please indicate whether you agree or disagree with that statement.

Millennials are living in more walkable, transit-oriented neighborhoods

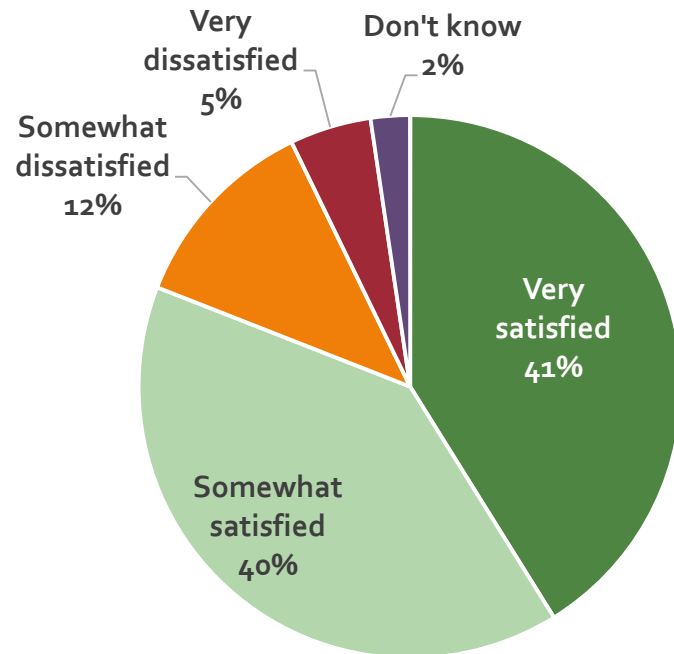
Millennials were most likely to say that there were lots of places to walk to nearby and public transit, but least likely to say that there were bike lanes and paths nearby.

Q4 -8. Now, I have a few questions about your neighborhood and home. For each, please indicate whether you agree or disagree with that statement.



People with places to walk to are more satisfied with the quality of life in their community

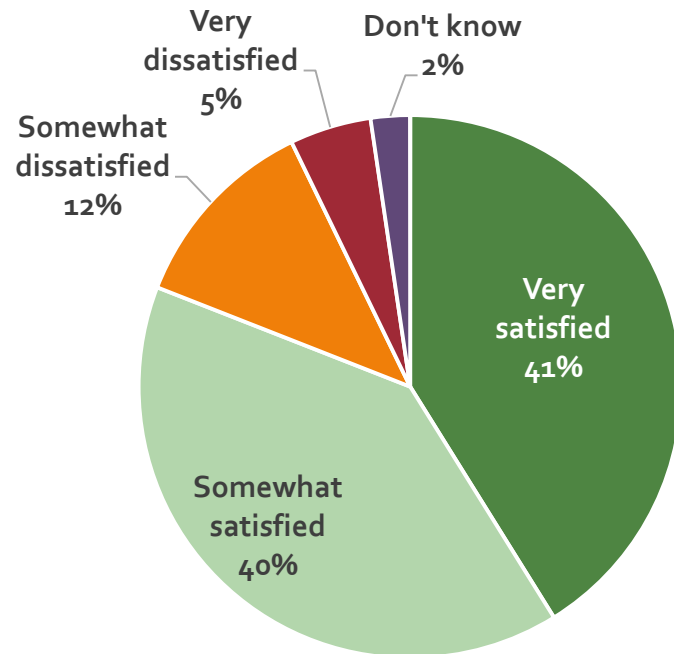
Quality of life in your community
(all respondents)



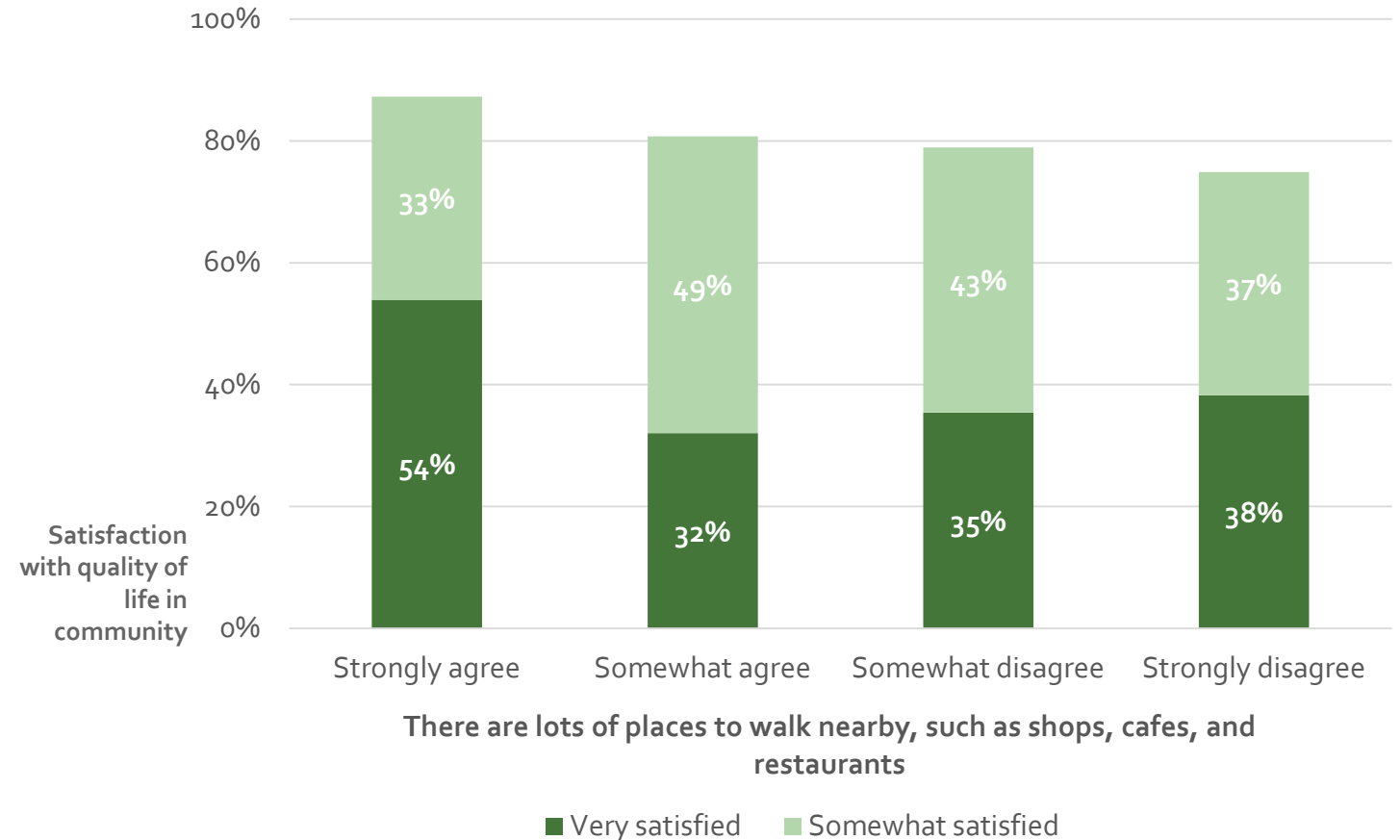
Q3. Would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the quality of life in your community?

People with places to walk to are more satisfied with the quality of life in their community

Quality of life in your community
(all respondents)



Q3. Would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the quality of life in your community?



Questions?

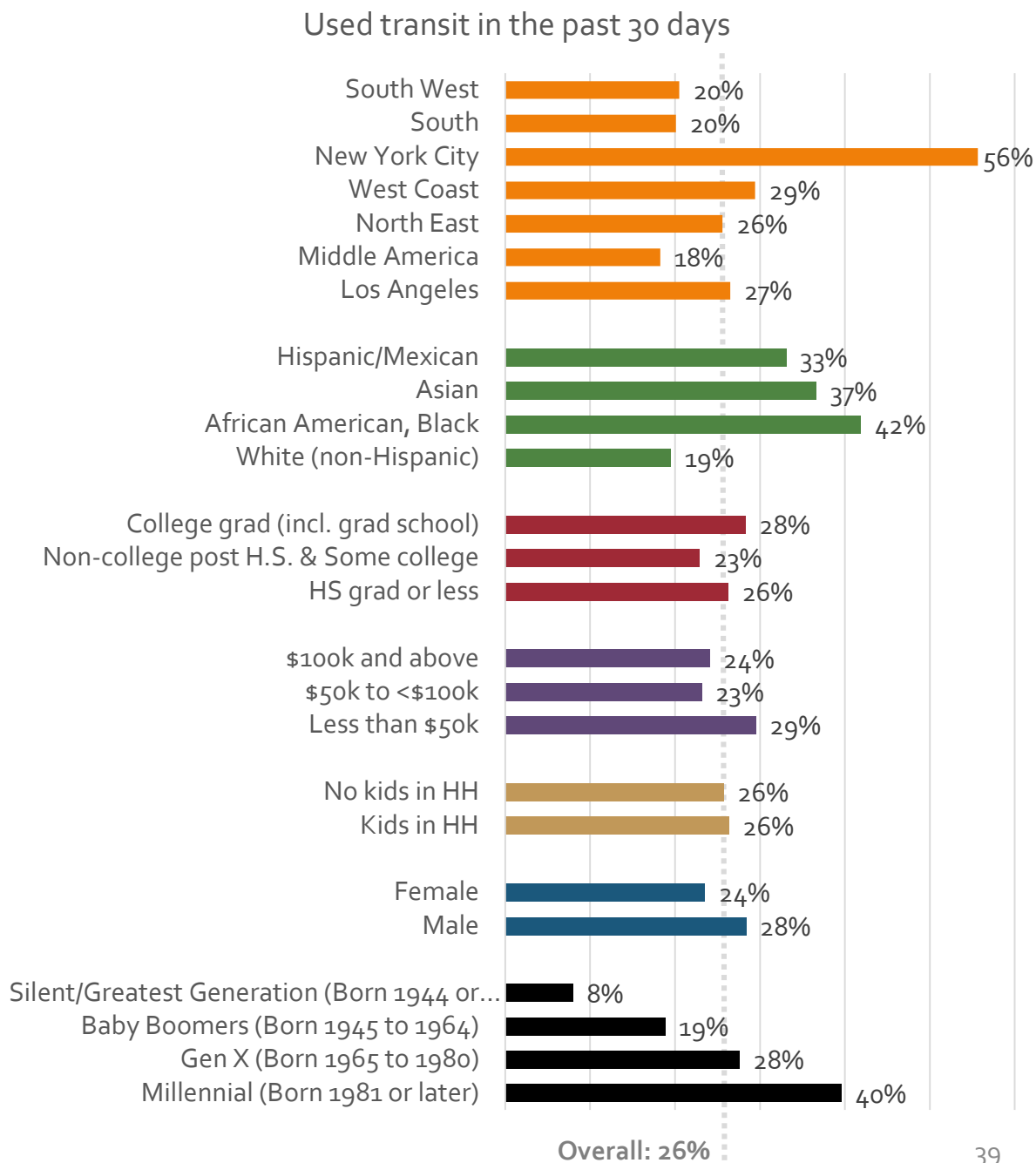
- These are just our initial “big picture” findings. Stay tuned for more!
- Acknowledgements
 - The research was conducted by the National Association of Realtors® and Portland State University, with additional funding from the National Institute for Transportation and Communities (a US DOT University Transportation Center).
 - Project team:
Jennifer Dill and Nathan McNeil, Portland State University
Joe Molinaro and Hugh Morris, National Association of Realtors®
Joe Goode, American Strategies

Bonus slides

Transit use in the past 30 days

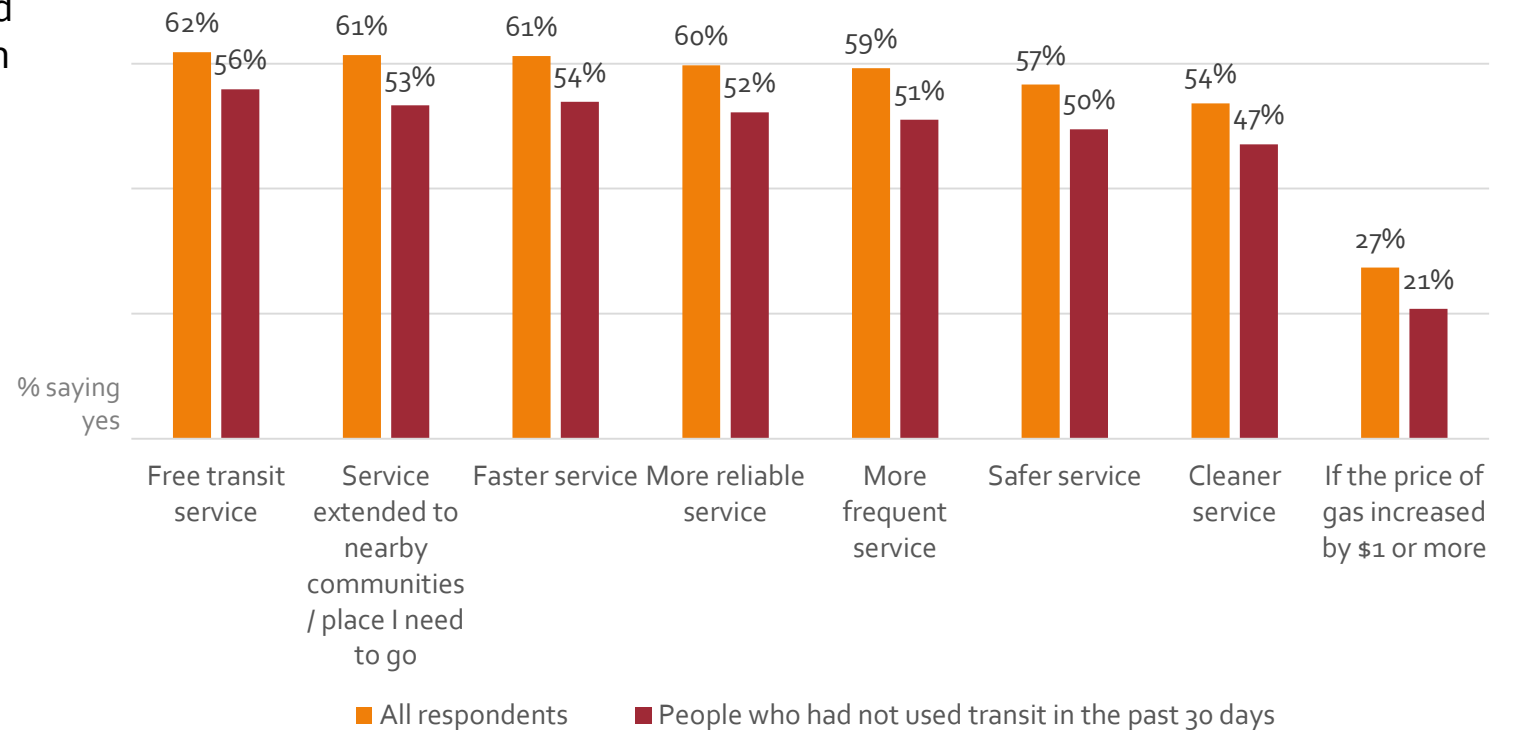
Millennials are more likely to have taken transit in the past month than nearly any other demographic category.

Q35. In the past 30 days, about how many days did you use public transportation such as buses, subways, light rail, or commuter trains?



Gas price increases won't motivate more transit use

Respondents say that lower or free fares and better transit service would encourage them to ride more, but a \$1 increase in gas prices likely would not.



Q37 Please tell me, yes OR no, if any of the following would encourage you to make greater use of transit service.

Only asked of people who said they had transit available.

Most transit riders have other options

Only 22% of Millennials and Baby Boomers, 29% of Gen Xers, and 4% of the Silent Generation who had taken transit in the past 30 days strongly agreed that it is their only option.

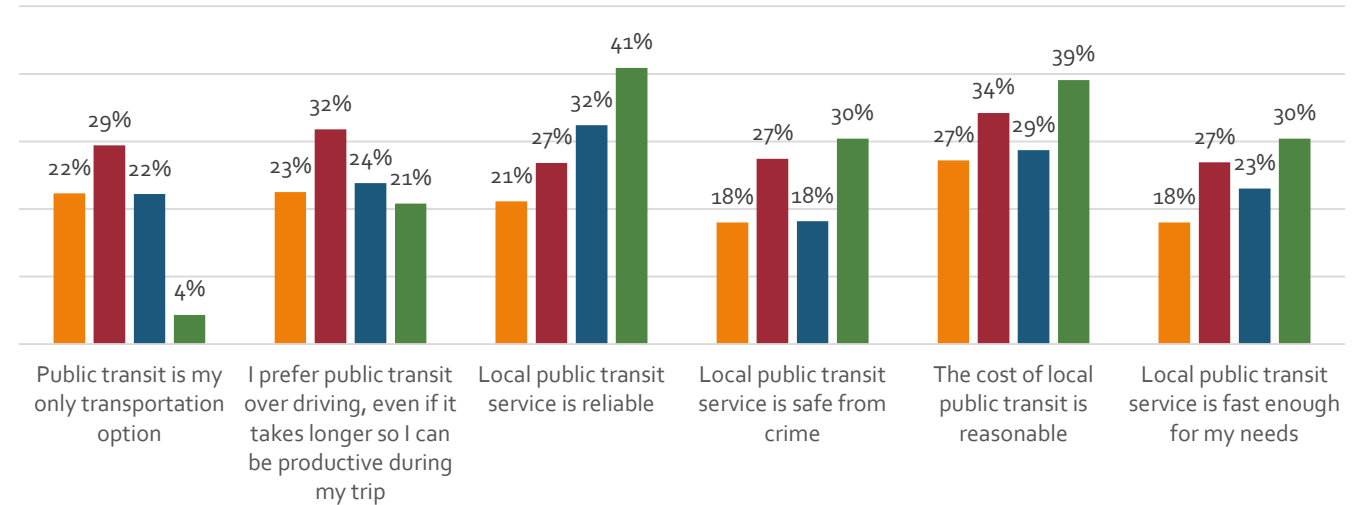
Of those who used transit, Millennials were the least likely to strongly agree that service is reliable. This is likely a result of their more frequent use.

Gen Xers who used transit were the most likely to strongly agree that they preferred transit to driving because they would be productive.

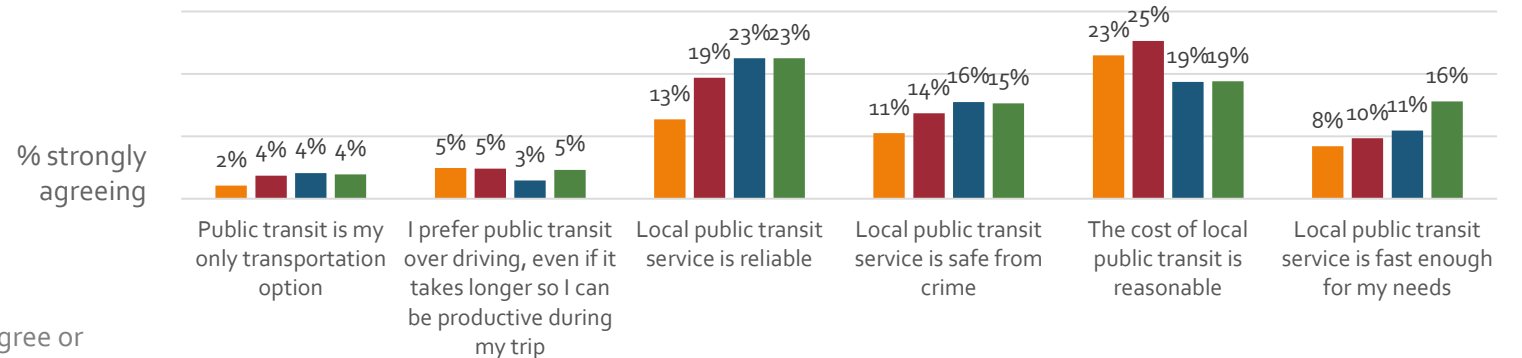
Q45 For each of the following statements, please tell me if you agree or disagree.

Only asked of people who said they had transit available.

People who had used transit in the last 30 days



People who had NOT used transit in the last 30 days



■ Millennial (Born 1981 or later)
 ■ Gen X (Born 1965 to 1980)
 ■ Baby Boomers (Born 1945 to 1964)
 ■ Silent/ Greatest Generation (Born 1944 or before)

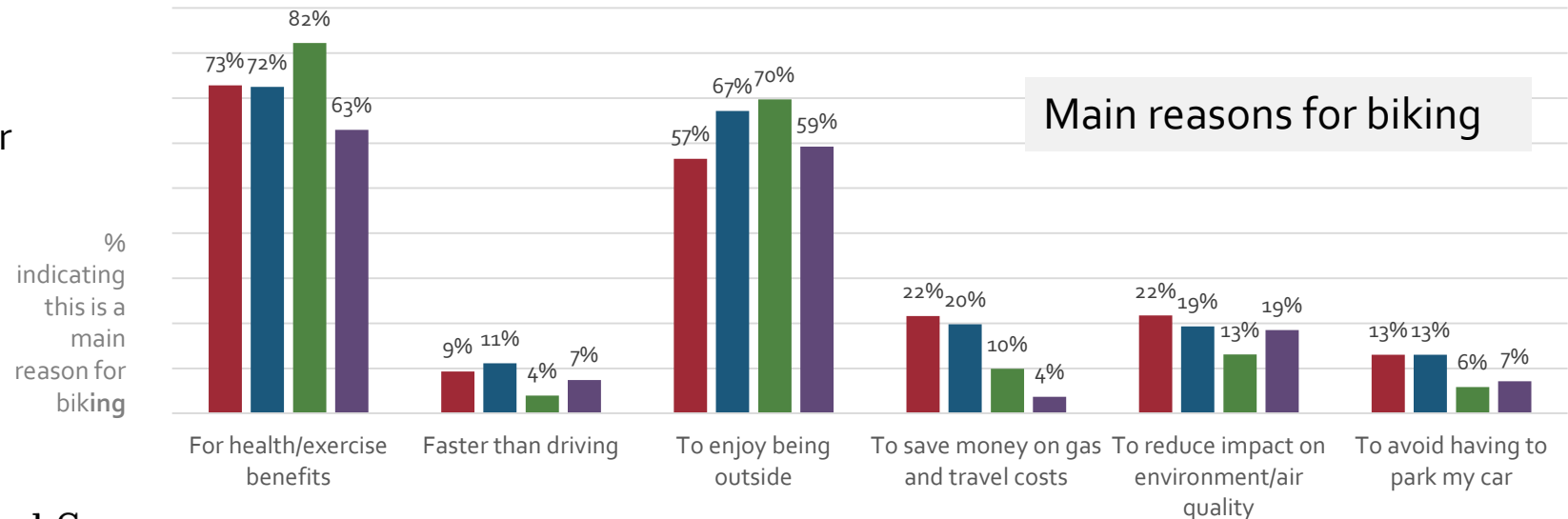
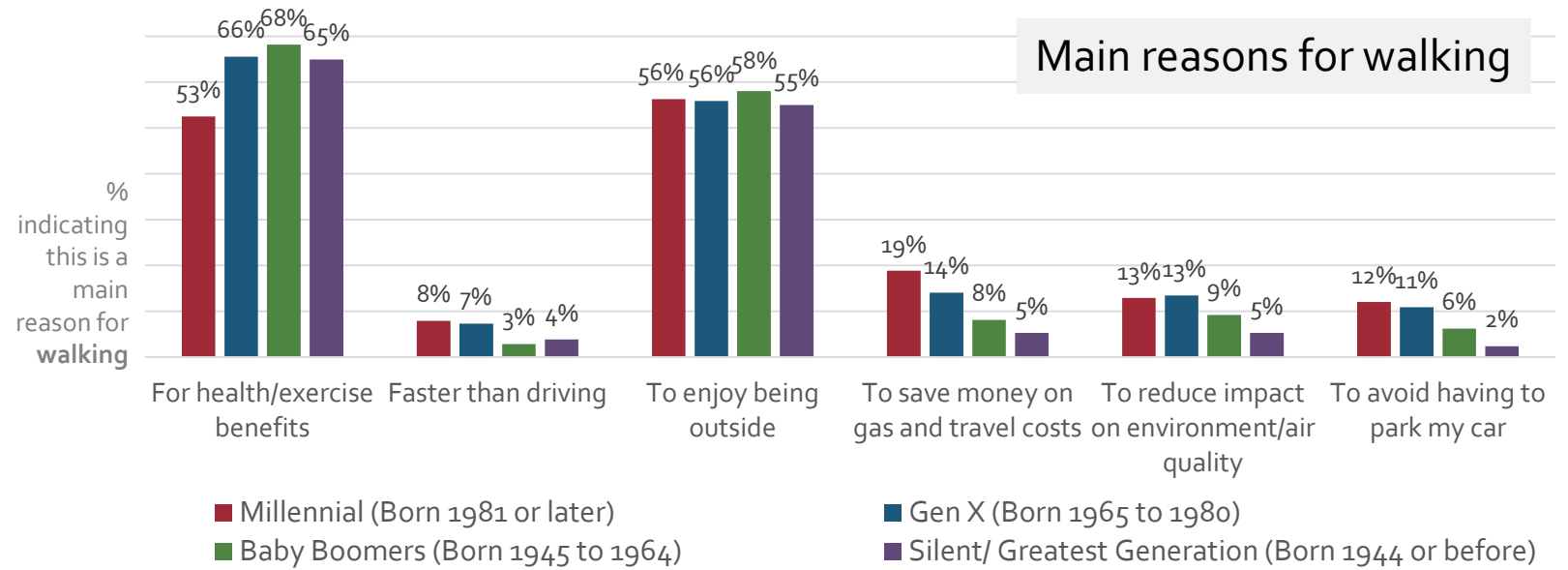
Health and being outside are the main reasons for biking and walking

However, some motivations vary by age. While a majority of all adults indicate that health and exercise benefits are a main motivation for walking, Millennials were less likely to give this reason.

19% of Millennials indicated that saving money was a main reason for walking.

The environment is more of a motivation for bicycling than for walking.

Q57-62. Why do you choose to walk? Is this a main reason, somewhat of a reason, or not a reason at all?

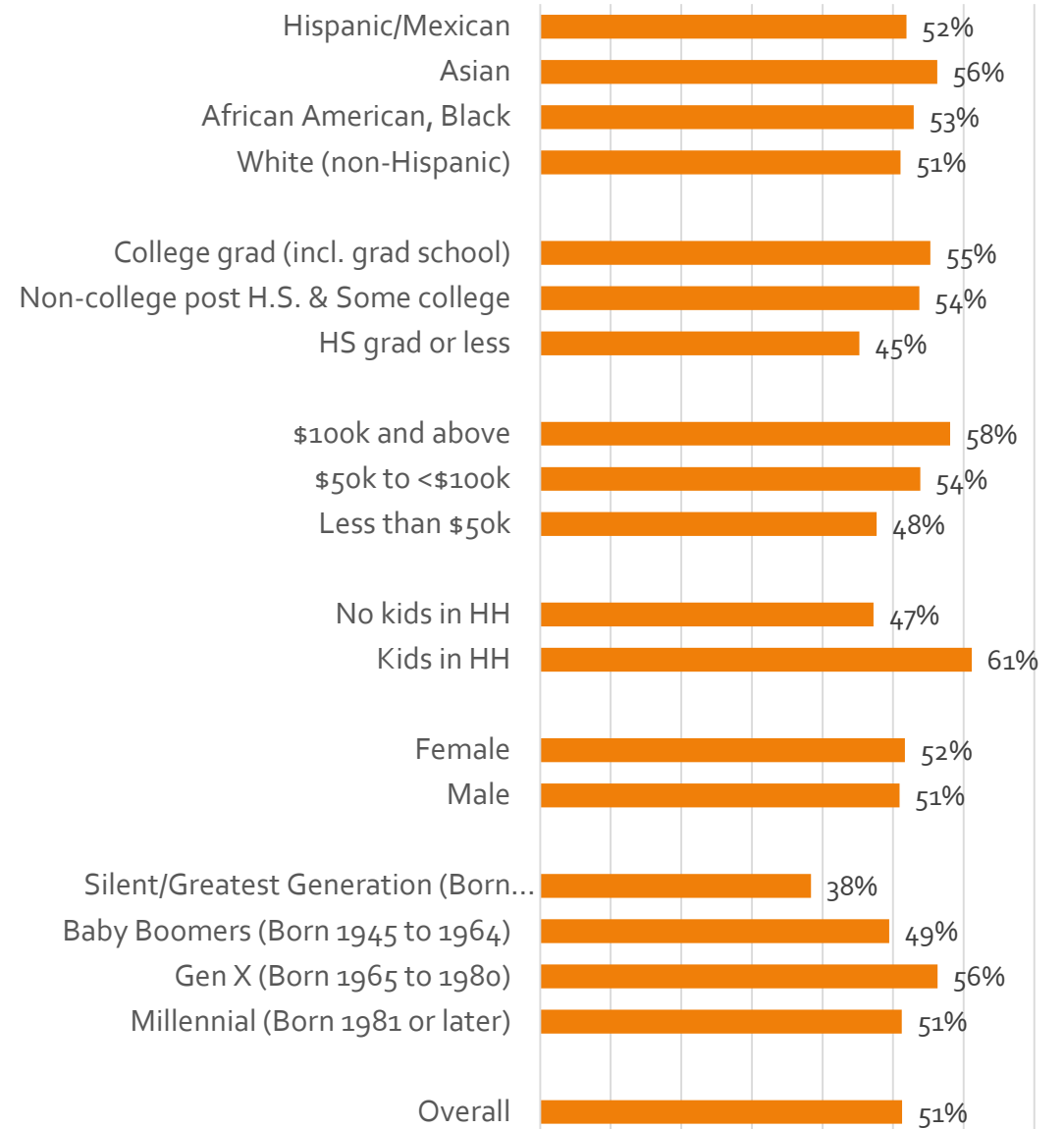


Reason for not biking: Needing a vehicle for other reasons

People with kids are most likely to cite this as a barrier to bicycling more

Q86 (If able to ride bicycle and know how in bike or temporary condition)
Now, I'd like you to think about things that may keep you from doing more biking. Please tell me yes OR no, if any of these keep you from doing more biking?

Need vehicle for work/school/other reasons



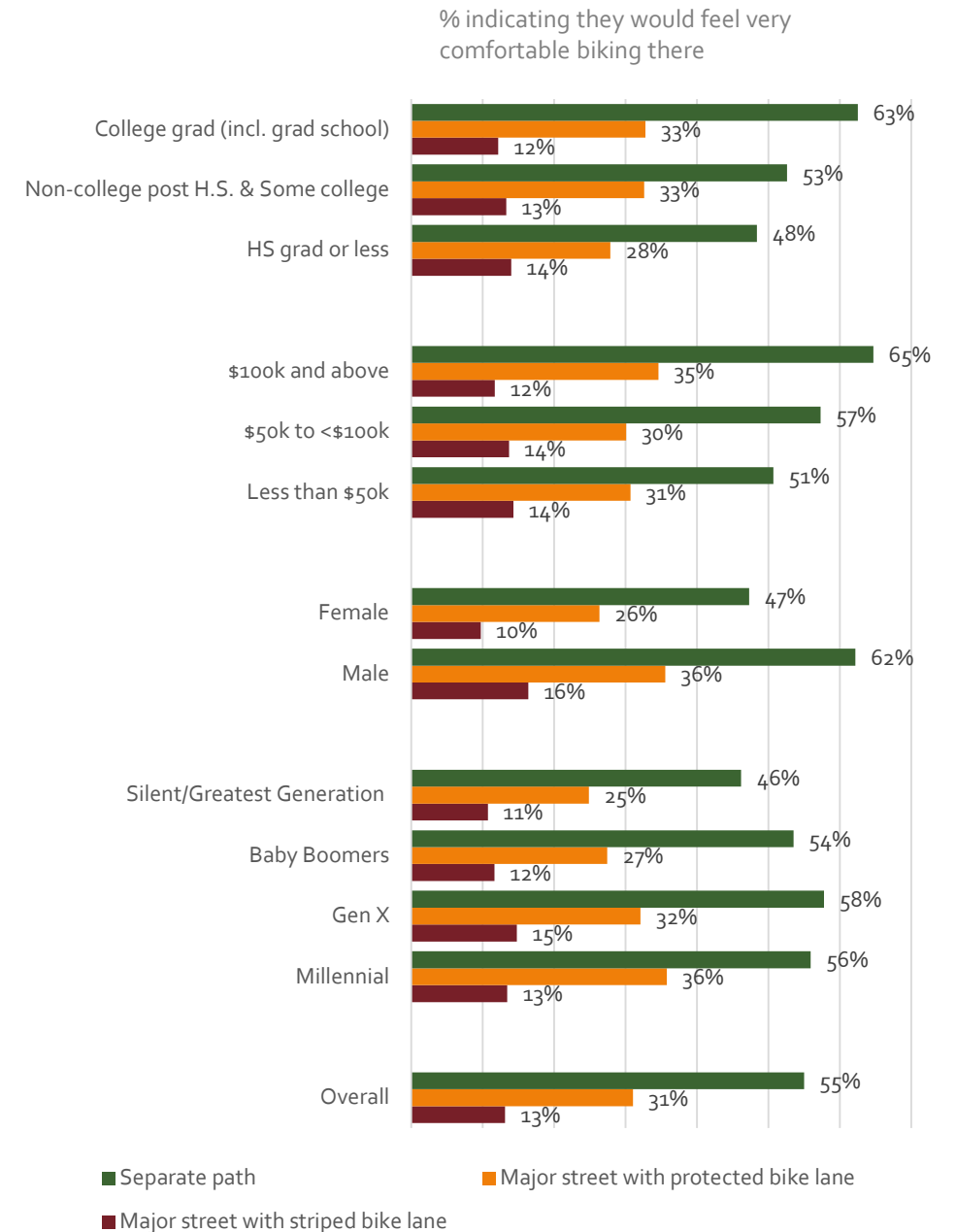
Comfort level biking in different environments

Most people feel very comfortable riding a bike on a separate path or trail. But only 13% feel very comfortable riding on a busy urban street with only a striped bike lane – the most common type of bike infrastructure in most cities. Adding more protection from traffic, such as with a curb, planters, or parked cars, increased comfort. 31% said they would feel very comfortable riding in such a lane.

Women and older adults feel least comfortable.

Q84. Only includes people who can physically ride a bicycle and know how. Now, I'm going to read you a list of places you could ride a bike. For each, please tell me whether you would be comfortable or uncomfortable biking there.

- path or trail separate from the street
- major urban or suburban street with four lanes, on-street parking, traffic speeds of 30-35 miles per hour, and a striped bike lane
- major urban or suburban street with four lanes, on-street parking, traffic speeds of 30-35 miles per hour, and wide bike lane physically separated from traffic by a raised curb, planters, or parked cars



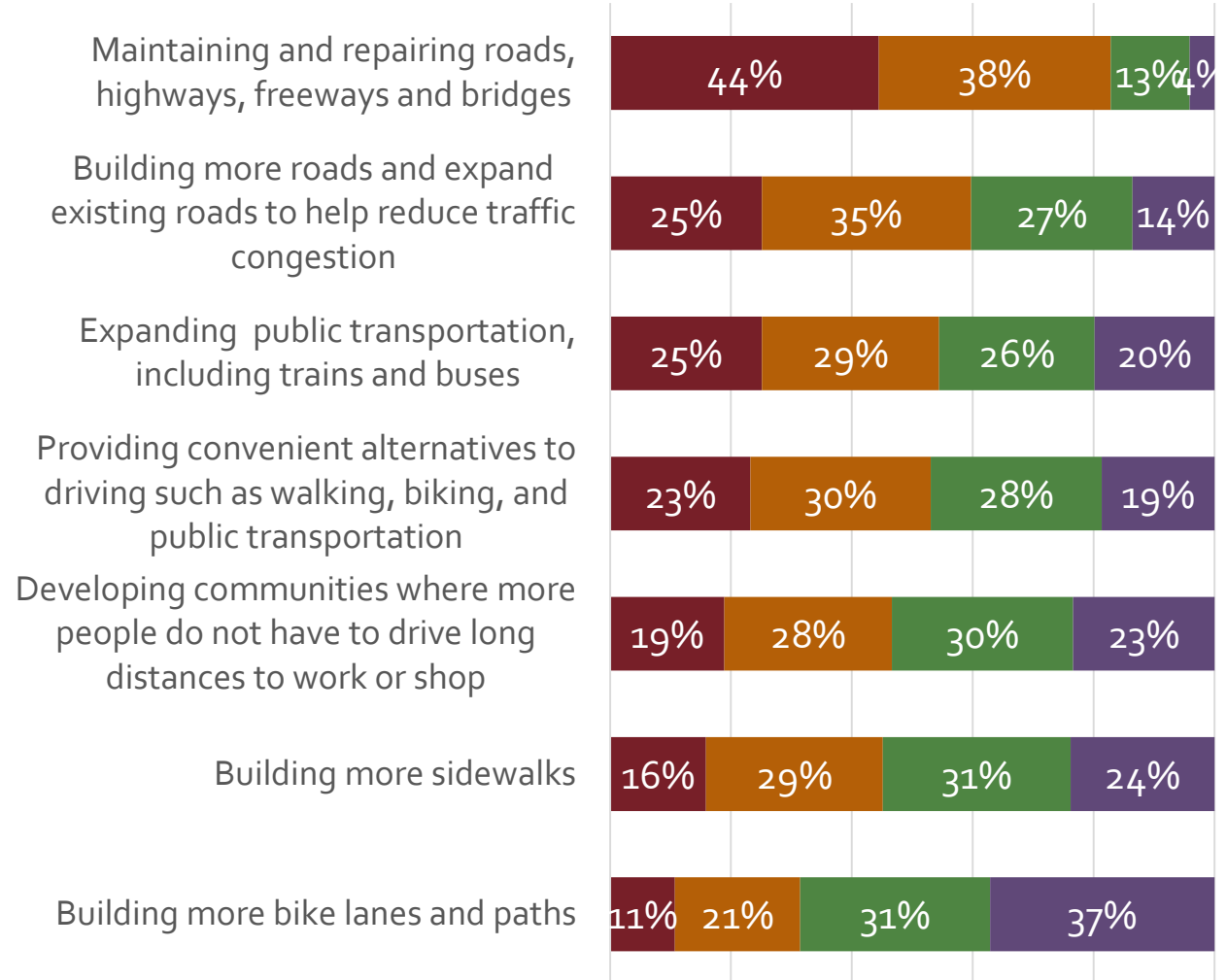
Maintenance is the clear priority

83% indicated that maintaining and repairing roads and bridges is a high priority, with over half of those saying it is an extremely high priority

This far exceeded the next priority: expanding roads to help reduce congestion (60% high or extremely high)

Over half indicated that expanding public transit and providing convenient alternatives to driving, such as walking, biking and transit were high priorities.

Q19-25. Now, I'm going to read you a list, and I'd like you to tell me whether each of the following should be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for the government.



■ Extremely High ■ High priority
■ Middle priority ■ Low priority

Don't know responses not included (<5%).