

National Community and Transportation Preferences Survey

Coronavirus Update, July/August 2020

Executive Summary

Results from the Coronavirus Update to the 2020 Community and Transportation Preferences Survey generally continue the trends from previous surveys of the top fifty metropolitan areas. However, younger respondents – especially those with children at home – show some effects of the pandemic. Among these respondents there is a reduced need to be near highways and public transit or to have a home with a short commute to work. There is an increased desire for more outdoor space and larger homes, most particularly among Millennials and those with kids at home. Older generations show fewer overall effects but do want more places to walk and indicate a desire to be closer to family. In most cases, the changes are subtle but reflect some underlying movement.

Younger residents are less satisfied with quality of life during pandemic. Overall, eight-in-ten residents are satisfied with their quality of life, in line with the February poll and previous National Smart Growth surveys. However, Gen Z (-10) and Millennials (-4), generations under age 40, both report a drop in their quality of life, while Gen X and Boomers hold steady. The oldest generations – Silent and Greatest, who are age 76 or older – also have seen a small drop in their quality of life.

Public transit nearby and easy access to the highway drop in importance during pandemic. Some of the biggest differences in the July vs February surveys appear when we asked how important certain characteristics would be if deciding where to live today.

- There is a significant drop in the importance of having public transit nearby (8 points lower than February results) and in having easy access to the highway (5 points lower than February results, 8 points lower than 2017).
- The importance of highway access falls most among Gen X and older – who previously prized it more highly than the younger generations – as well as those with higher incomes.
- Among Millennials, there is a significant drop in importance of commute length, in addition to public transit nearby.
- Older generations (Gen X and older) and those with higher incomes show an increased interest in walkability and places to take walks.

Executive Summary

While overall Americans in the top fifty MSAs continue to be split in their preference for walkable communities versus different options that require more driving, families with children in school show an increased desire for detached homes and larger yards.

- A majority (56 percent) of Gen Z and Millennials with children in school now prefer a large yard in a driving community (+11 from February). This is a flip from February, when the majority preferred a smaller yard in a walkable community.
- This increase among Gen Z and Millennials with kids in school puts the younger generations closer in line with Gen Xers with kids in school, six-in-ten of whom already preferred the more traditional suburban community.
- There is no change in preference among those who do NOT have children living at home.
- During the pandemic, those with kids at home also see an increased preference for a detached home in a driving community with a longer commute versus an attached home in a walkable community with a shorter commute. Pre-pandemic, a majority of those with kids at home already favored the detached home, however the percentage of families preferring that detached home increases among both Gen Z/Millennials (+4) and Gen Xers (+6), notwithstanding the longer commute.

Executive Summary

There is little change in transportation priorities for the government during the pandemic, with maintaining and repairing roads continuing to lead the pack of previously tested transport priorities – and falling just short of Covid and the economy, tested this time.

- We tested the list of priorities in two ways: for half of the respondents, we included “controlling the spread of coronavirus and preventing future outbreaks” and “creating jobs and improving the economy” among our usual list of transportation priorities; the other half saw the same priority list as in past surveys. There was no significant difference between the groups; those with Covid and the economy included did not show a lower propensity to prioritize transportation needs.
- Three-quarters rank improving the economy and controlling the spread of coronavirus as a high priority, with a majority saying controlling the spread of Covid should be a *very* high priority. Falling just below those priorities, seven-in-ten say maintaining and repairing roads, highways, freeways, and bridges should be a high priority for the government.
- Other priorities change little from February; the drop in priority for building new roads seen in February remains evident now.

While overall there is little change in preferences regarding one’s daily commute, some generational movement appears:

- There is a drop among the younger generations in how many say they like taking transit, like trains or buses.
- Among the older generations (Gen X and older), the appeal of bike riding increases.

Executive Summary

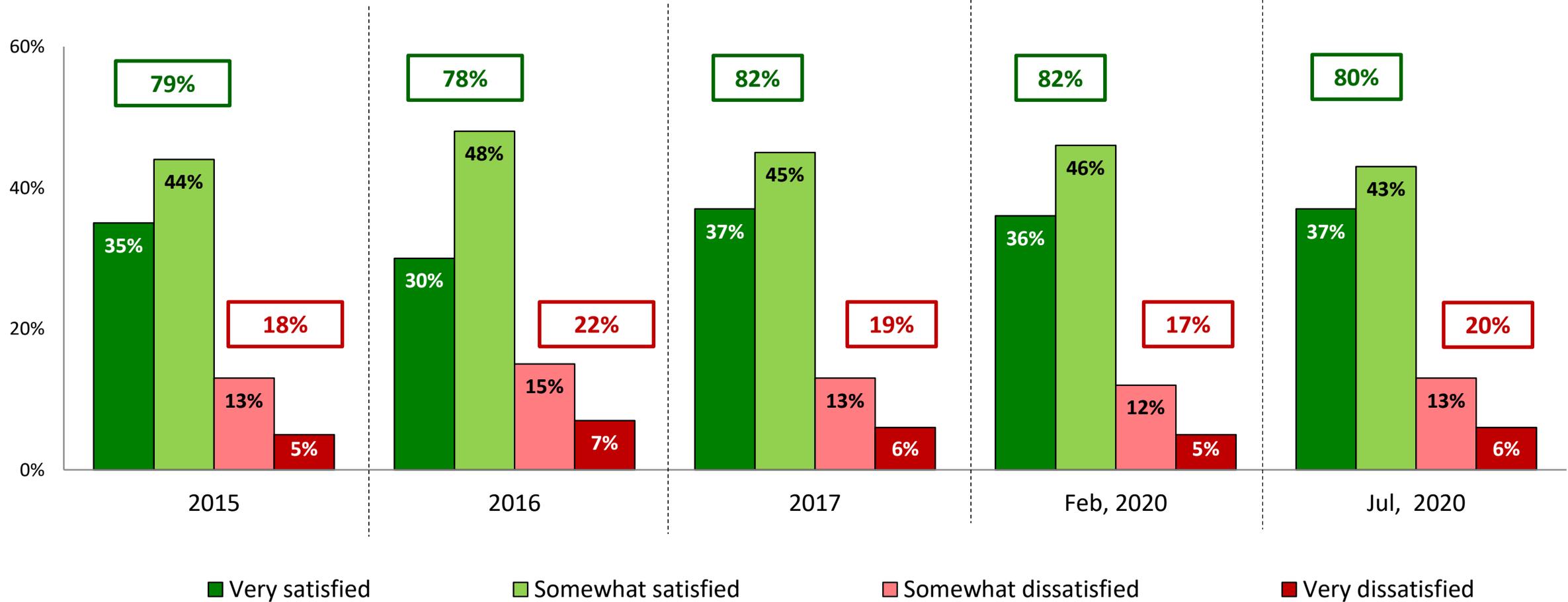
Millennials are driving the desire for bigger homes; Millennials and Gen X want more outdoor space. In a new battery, we ask about seven things people have said about their housing situation and the coronavirus outbreak. Overall, wanting a larger yard or access to more outdoor space top the list, but generation, age, and kids at home tell a more nuanced story of what is important. While we cannot compare this to pre-pandemic desires – and it is likely many younger respondents wanted bigger homes even before the quarantine, it is certainly clear that a large number of millennials are craving that space now.

- Over two-thirds of Millennials would like a larger home with more rooms and would like to make it easier to work from their current home by adding an office or private workspace. While majorities of Gen Z and Gen X feel the same way, they trail Millennials by seven to thirteen points in these wishes.
- Over two-thirds of Millennials and Gen Xers would like a larger yard or access to more outdoor space (Gen Z also falls into this category) or would like to move to a place with fewer people and more outdoor space.
- Two-thirds of seniors and the Greatest/Silent generations would like to live closer to family members.
- Over two-thirds of those with children at home want access to more outdoor space, would like to move to a place with fewer people and more outdoor space, and want a larger home with more rooms. These desires range from 11- to 18- points higher than those without kids at home.
- City residents, especially downtown, would like more space both inside and out.

*Coronavirus Appendix:
July/August 2020 Update*

Little Change in Quality of Life Since Covid

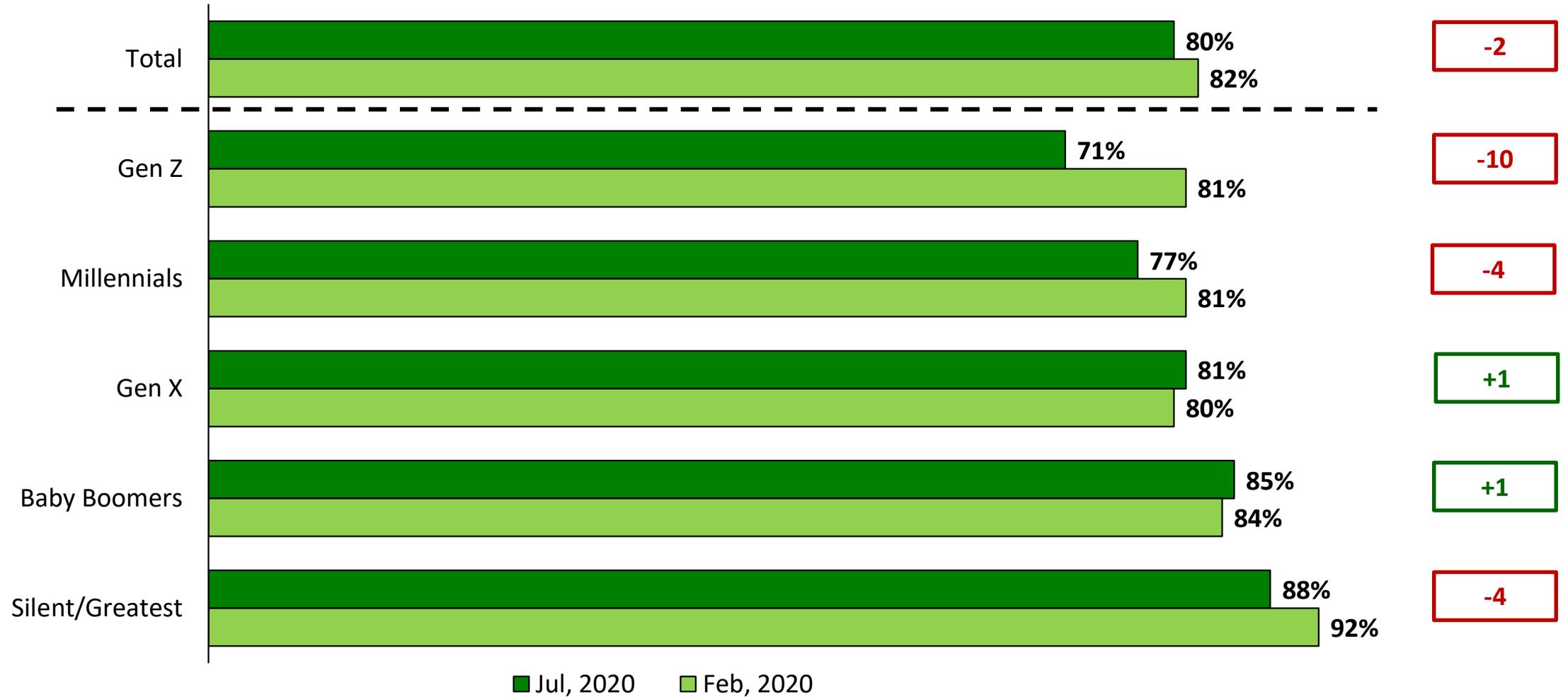
Quality of Life In Your Community



The first question is about the quality of life in your community. How satisfied would you say you are with the quality of life in your community?

Quality of Life Has Dropped More Significantly for Gen Z

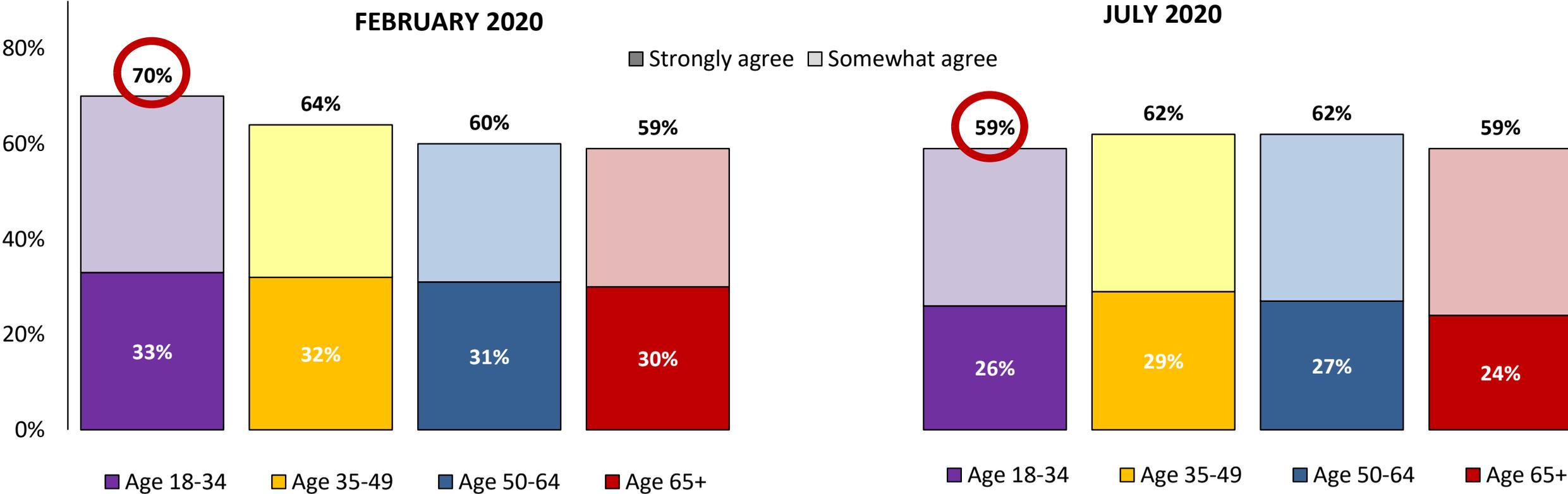
Total Satisfied: Quality of Life by Generation
July vs February 2020



The first question is about the quality of life in your community. How satisfied would you say you are with the quality of life in your community?

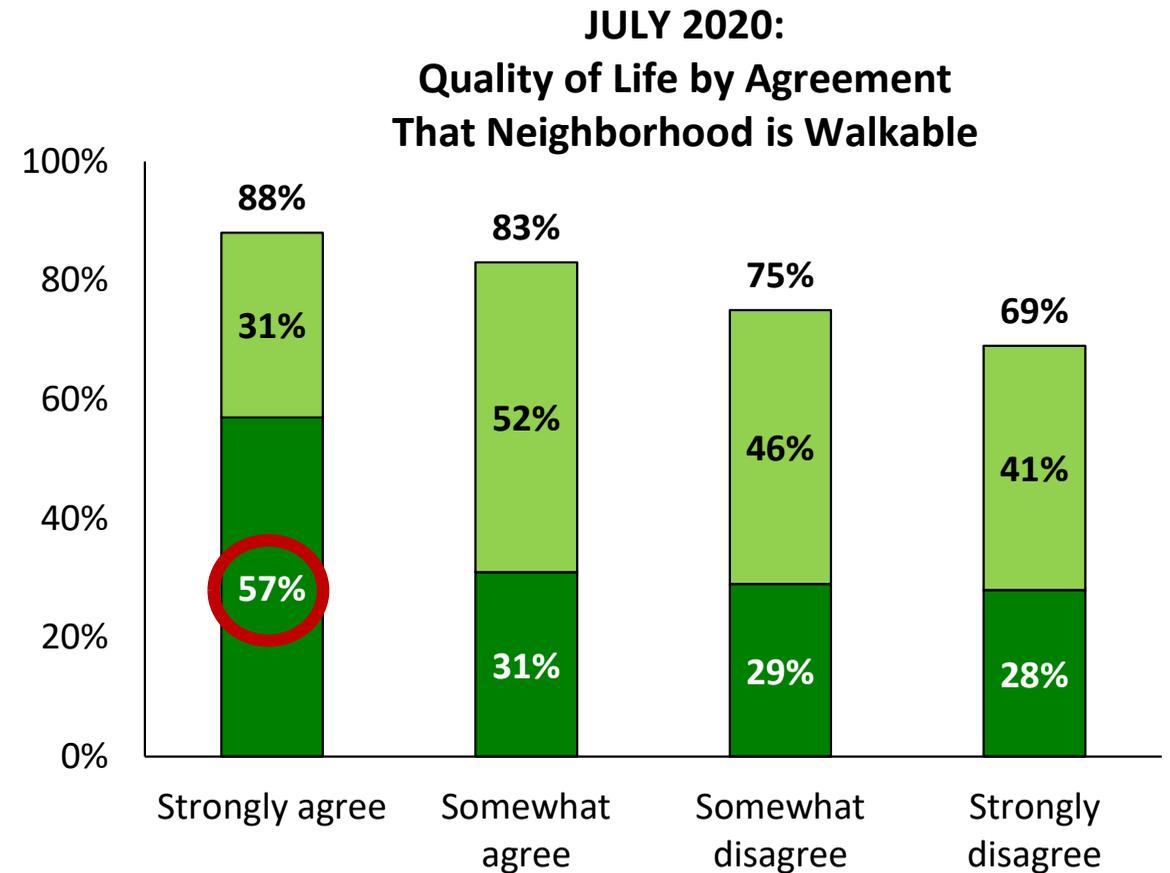
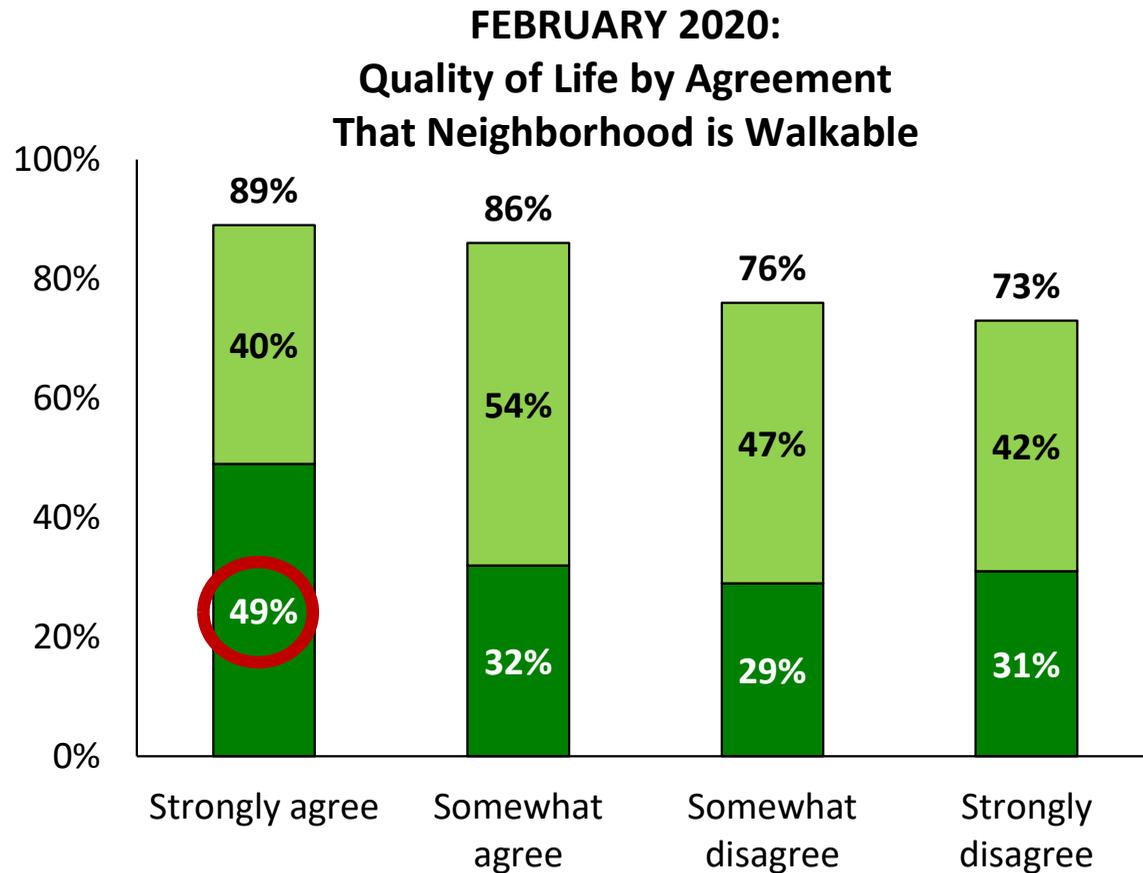
During Pandemic, Drop Among Young People When Asked if They Live in a Neighborhood with a Lot of Places to Walk Nearby

Agree: There are lots of places to walk nearby such as shops, cafes, and restaurants.
By Age Group



People with Places to Walk Remain More Satisfied with their Quality of Life

A majority in the most walkable areas are very satisfied; however the overall number in very walkable communities is down



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

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

■ Very satisfied ■ Somewhat satisfied

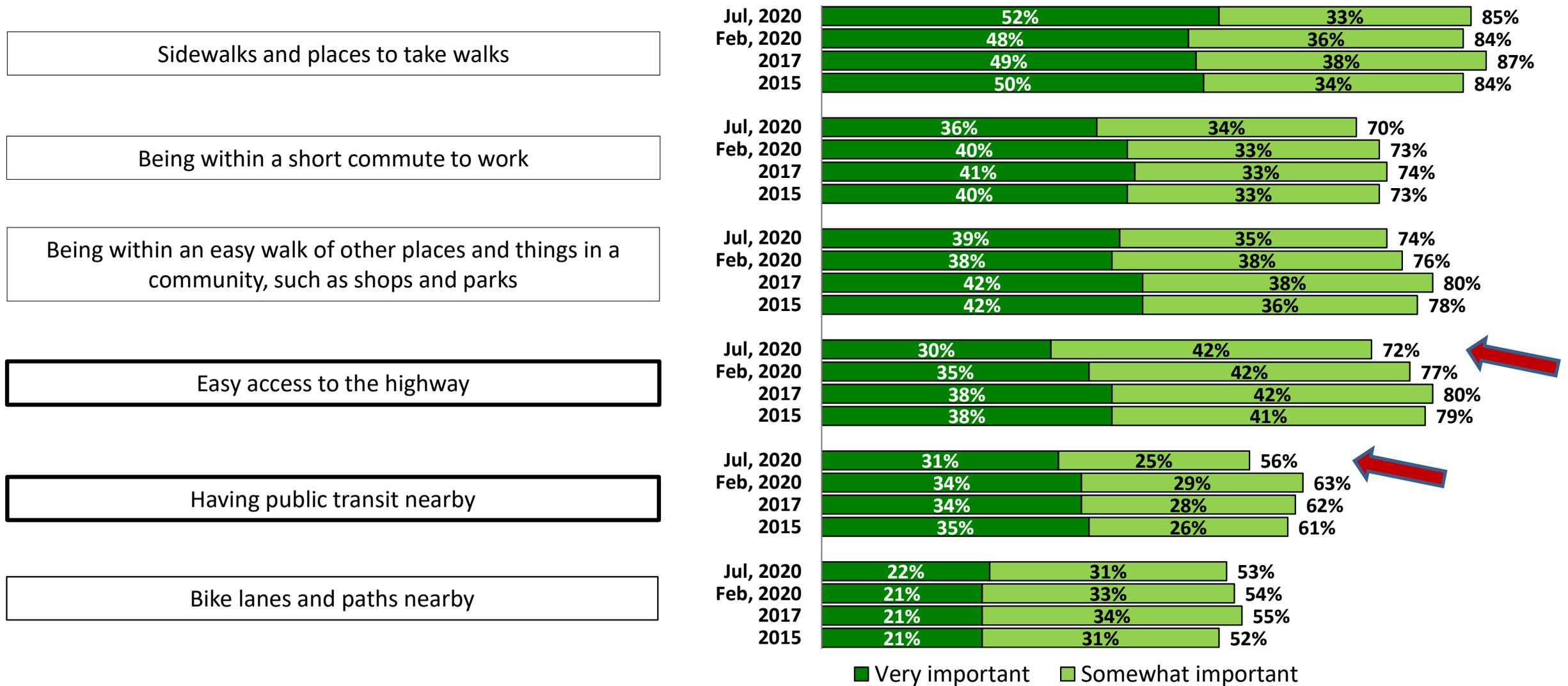
■ Very satisfied ■ Somewhat satisfied

The first question is about the quality of life in your community. How satisfied would you say you are with the quality of life in your community?

Now thinking about your neighborhood and home, please indicate whether you agree or disagree with the following statement:
there are a lot of places to walk nearby, such as shops, cafes, and restaurants.

Importance of Highway Access and Public Transit Nearby Drop During the Pandemic

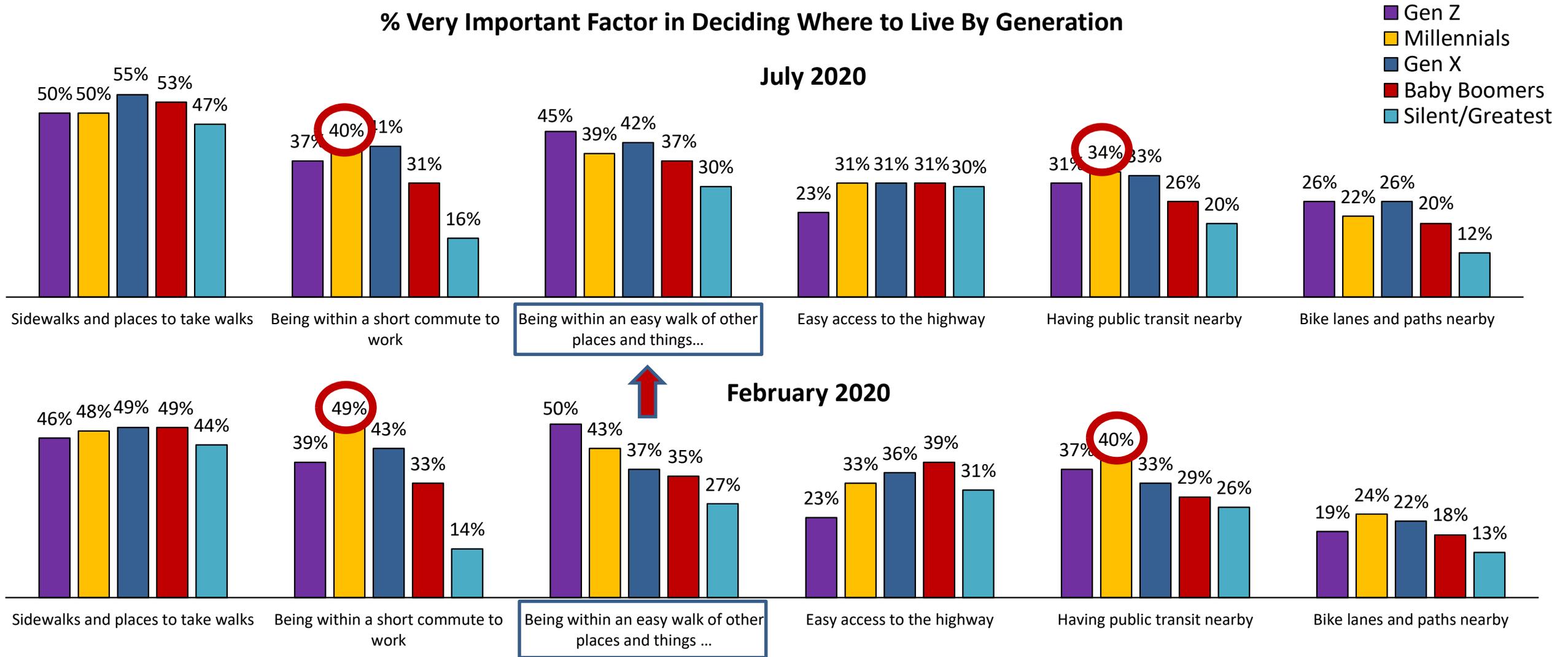
Most Important Factors in Deciding Where to Live:



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

Millennials Less Focused on Commute Time and Public Transit During Pandemic While Older Generations Show More Interest in Walking

% Very Important Factor in Deciding Where to Live By Generation



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

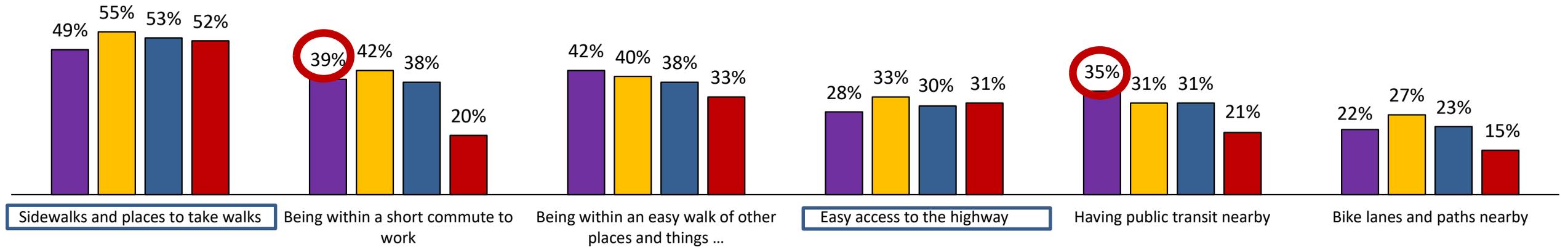
Under Age 35 Less Focused on Commute Time and Public Transit During Pandemic

All age groups are less focused on access to the highway, and more focused on places to take walks

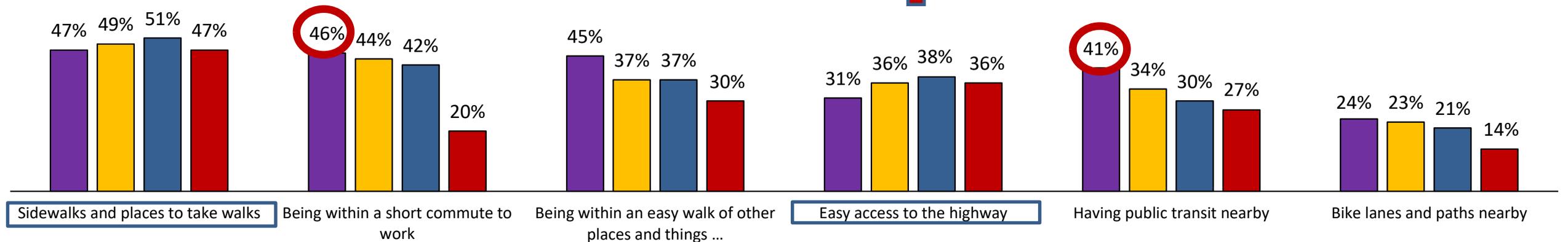
% Very Important Factor in Deciding Where to Live By Age Group

■ Age 18-34
■ Age 35-49
■ Age 50-64
■ Age 65+

July 2020



February 2020



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

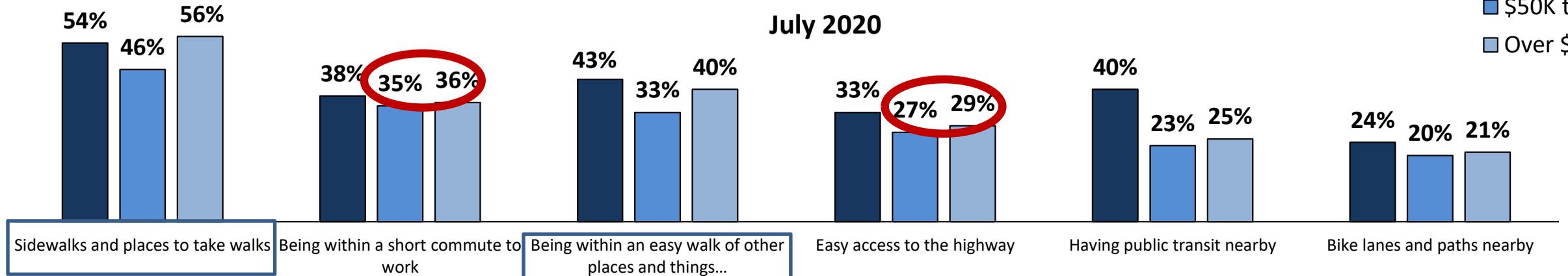
Short Commute and Highway Access Drop in Importance for Higher Income Americans, But Remain the Same for Lower Income

Sidewalks and walkability increase in importance for those with higher incomes

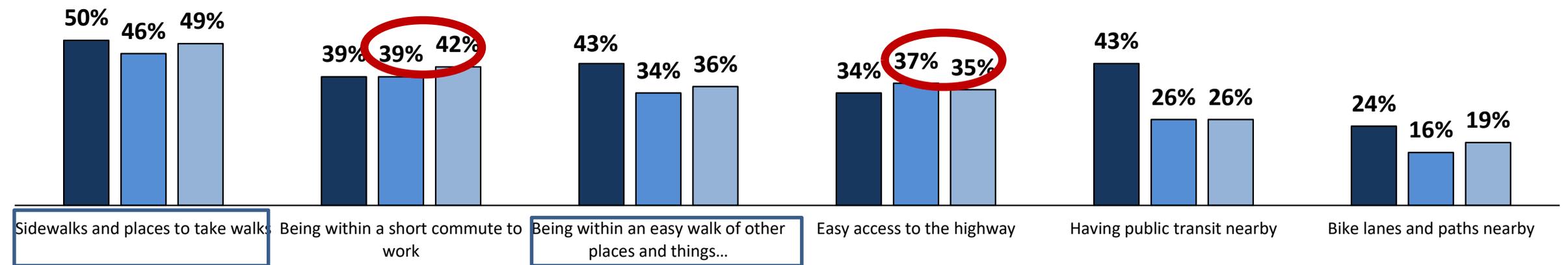
% Very Important Factor in Deciding Where to Live By Income

July 2020

■ Less than \$50K
 ■ \$50K to \$100K
 ■ Over \$100K



February 2020

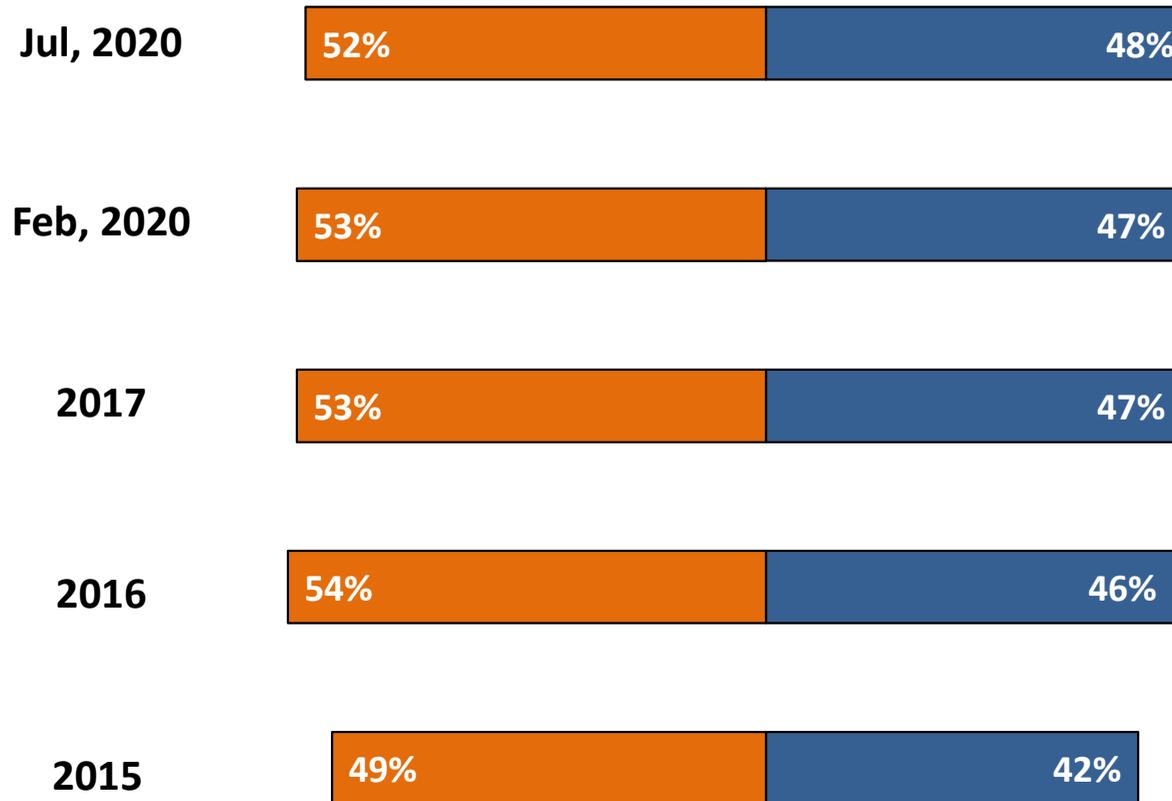


If you were deciding today where to live, please indicate how important each of the following would be to you:

No Change Overall from Pre-Pandemic: Americans in Top 50 MSAs Remain Split on Preference Between Walkable, Small Yard House and More Conventional Suburban Home

Slight majority continues to prefer walkable community with small yards

Preferred Community:



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

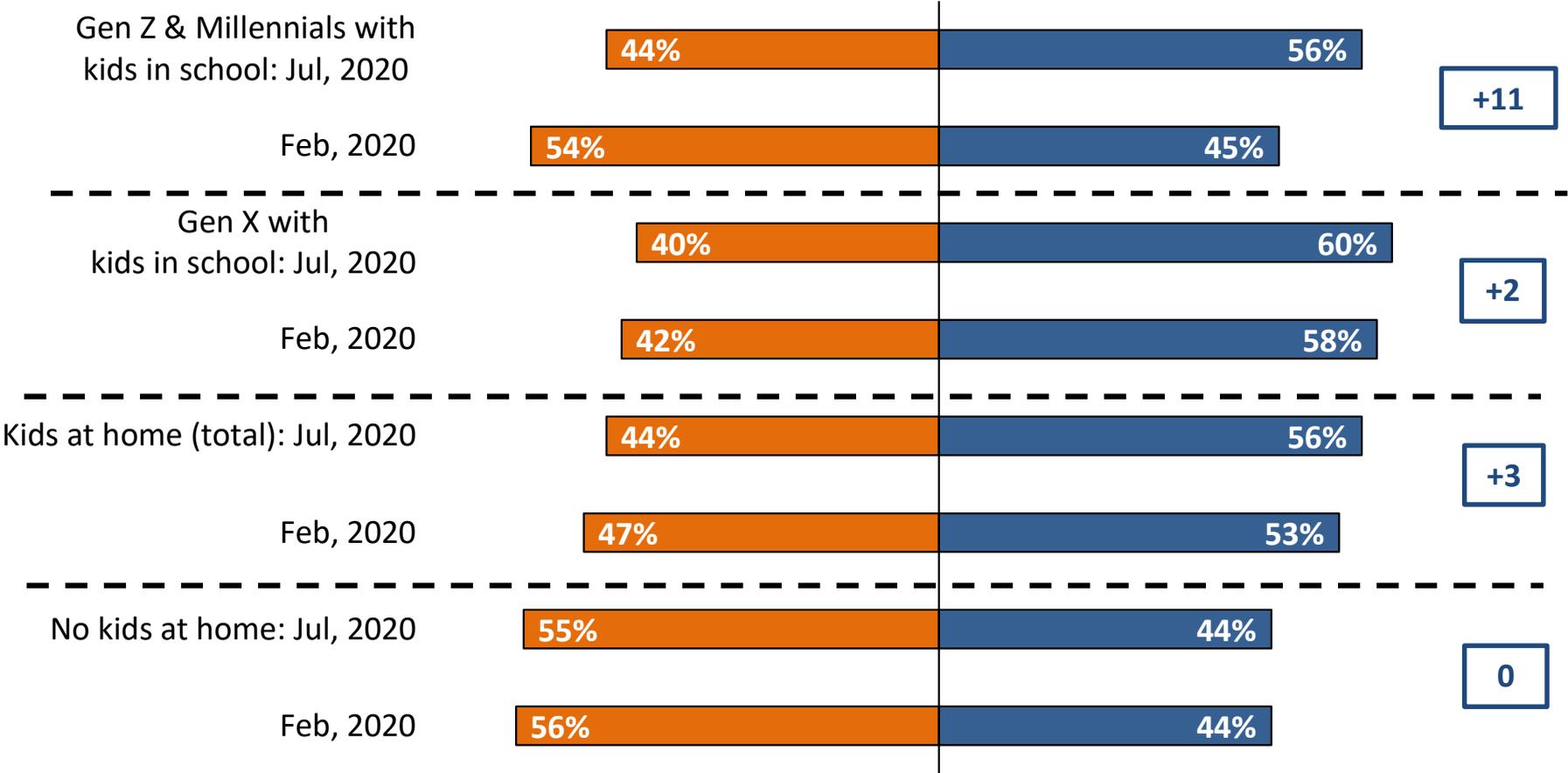
Houses with large yards and you have to drive to the places where you need to go.

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

Majorities of Gen Z & Millennials with Kids in School Now Want Large Yards

Less change among other generations with kids in school, who preferred large yards to begin with

Preferred Community by Kids in School and Generation

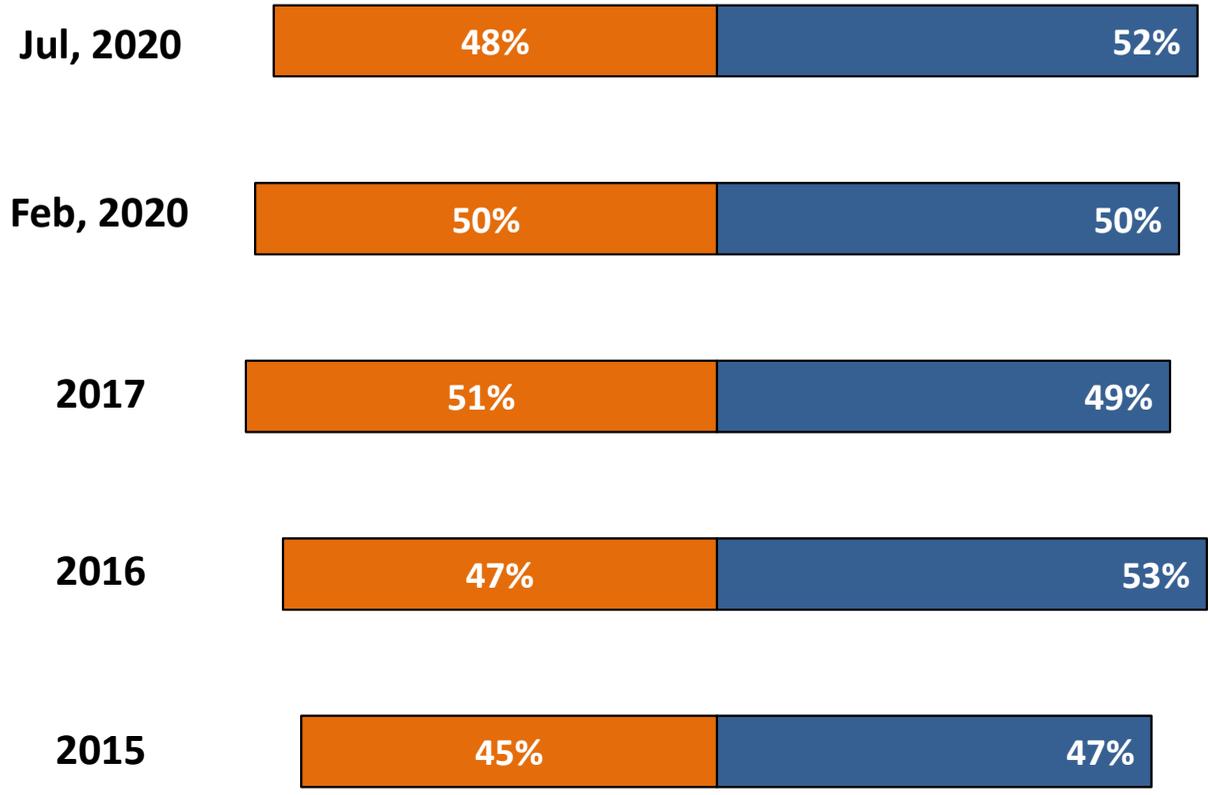


*Houses with **small yards** and it is **easy to walk** to the places you need to go.*

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

Little Change Overall from February: Split Remains on Preference for Attached Walkable Home With Shorter Commute versus Detached Home With Longer Commute

Preferred Community:



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

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

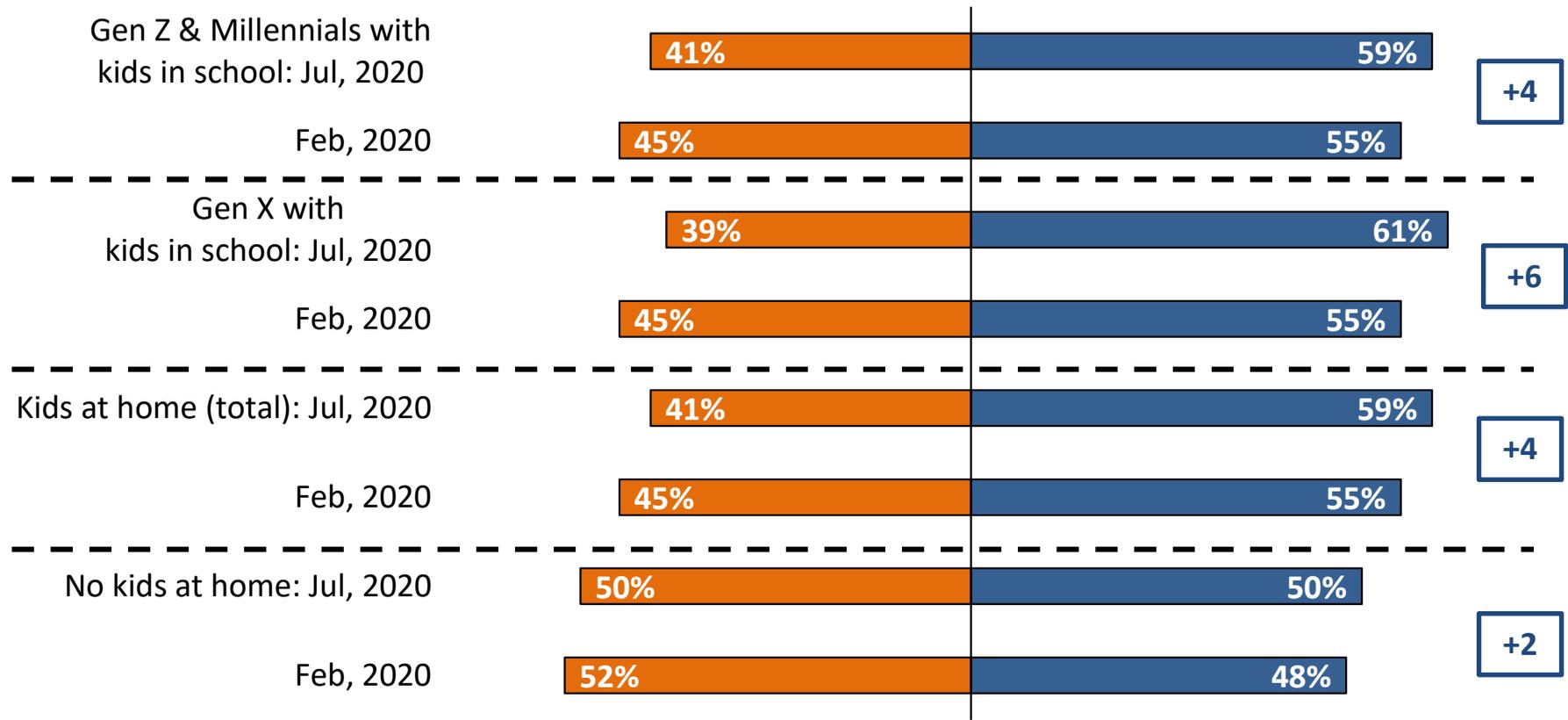
Preference for Detached Home with Longer Commute Increases During Covid for Those with Kids in School

Less change among those who do not have children in school

Preferred Community by Kid at Home and Kids in School

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

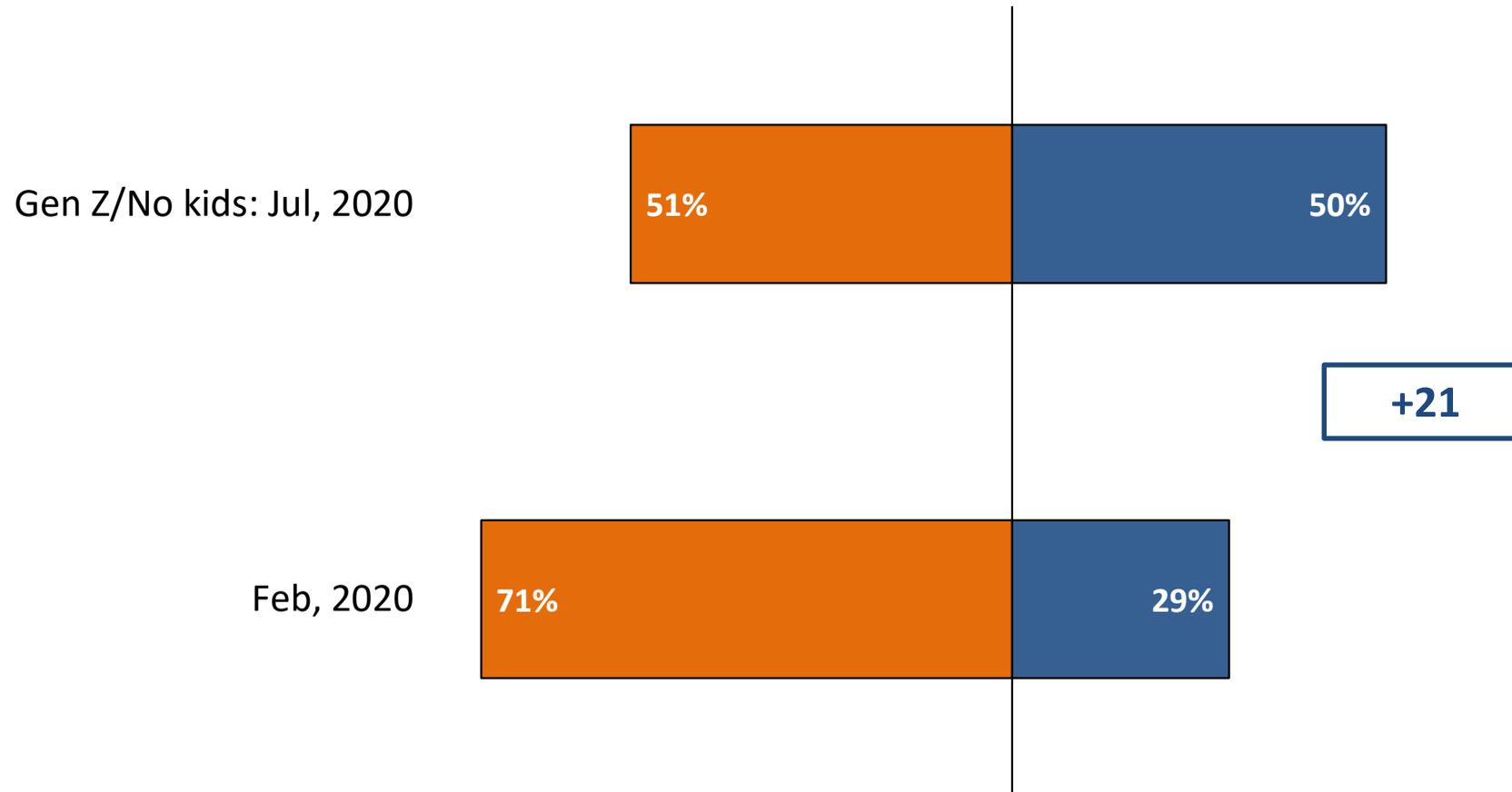
Own or rent a detached, single-family house and you have to drive to shops and restaurants and have a longer commute to work.



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

During Pandemic, Gen Zers without Kids* Show Increase in Desire to Live in a Detached Home Even with Longer Commute

Preferred Community: Gen Z with No Kids at Home (*N = 110)



Gen Z/No kids: Jul, 2020

Feb, 2020

+21

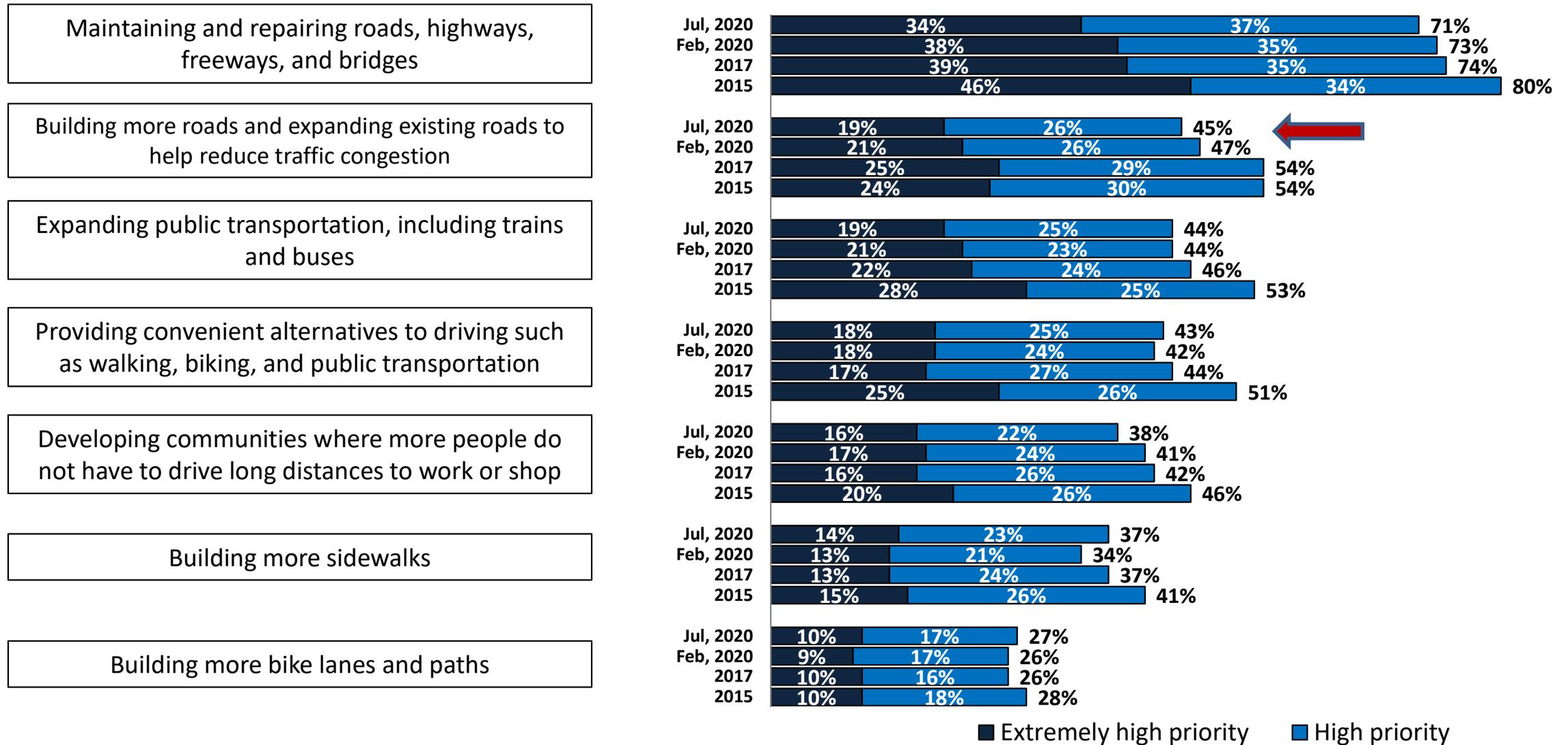
Own or rent an apartment or townhouse and you have an easy walk to shops and restaurants and have a shorter commute to work.

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

Little Change in Transportation Priorities From Before the Pandemic

The focus on building new roads remains lower than in previous years

Issue Priority for the Government



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

Over 7-in-10 Rank Controlling Covid, Improving the Economy, and Maintaining Roads as a High Priority for the Government

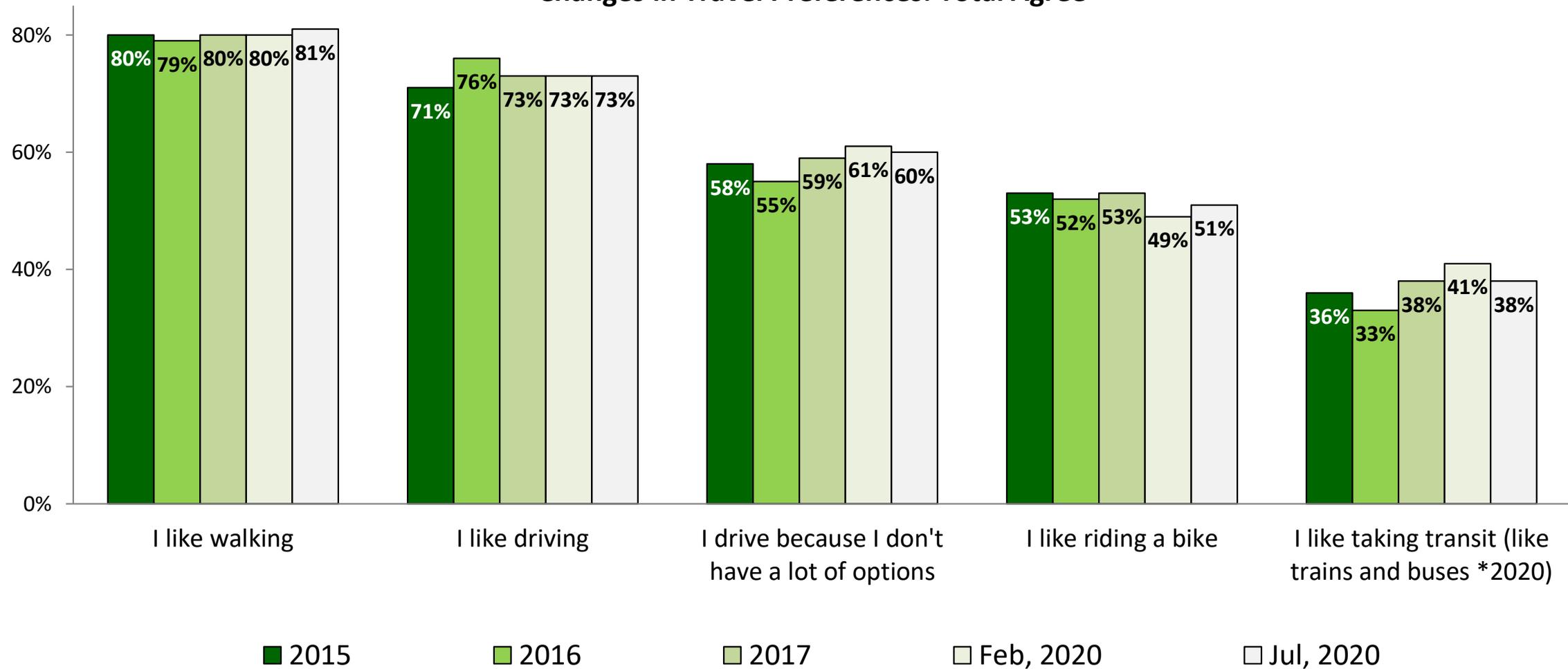
No difference in priority rankings between those who heard Covid and the economy and those who did not

Issue Priority for the Government, Split Test	Heard all priorities listed, including the economy and Covid		Heard only the seven priorities listed in previous surveys	
	Very high priority	Total high priority	Very high priority	Total high priority
Controlling the spread of coronavirus and preventing future outbreaks	56%	75%	--	--
Creating jobs and improving the economy	38%	74%	--	--
Maintaining and repairing roads, highways, freeways, and bridges	34%	70%	33%	72%
Building more roads and expanding existing roads to help reduce traffic congestion	18%	45%	19%	45%
Expanding public transportation, including trains and buses	21%	45%	17%	42%
Providing convenient alternatives to driving such as walking, biking, and public transportation	20%	45%	16%	42%
Developing communities where more people do not have to drive long distances to work or shop	18%	40%	15%	36%
Building more sidewalks	14%	35%	14%	37%
Building more bike lanes and paths	11%	27%	9%	26%

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

Overall Enjoyment of Walking and Driving Hold Steady; Little Change During Pandemic

Changes in Travel Preferences: Total Agree

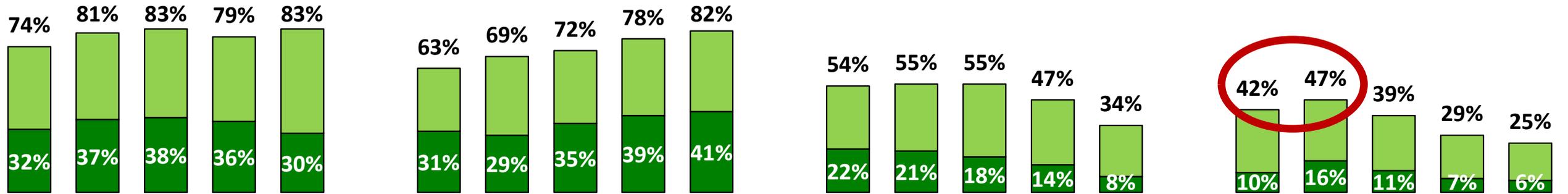


Liking for Public Transit Falls for Gen Z & Millennials During Pandemic

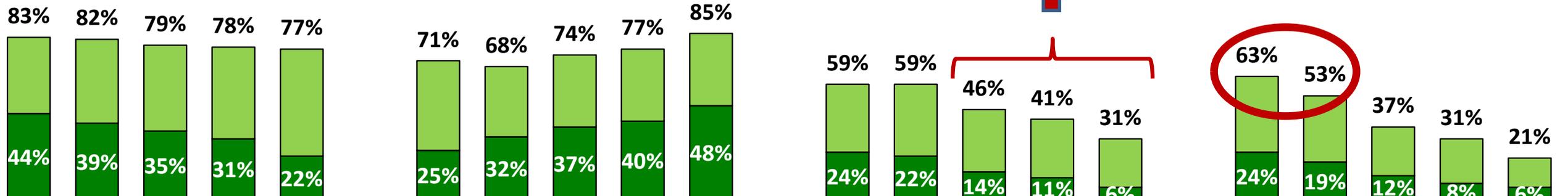
Bike riding increases in popularity for Gen X and older generations; Gen Z drops in their travel affinities across the board

Attitudes Towards Travel Modes by Generation

July 2020



February 2020



I like walking

I like driving

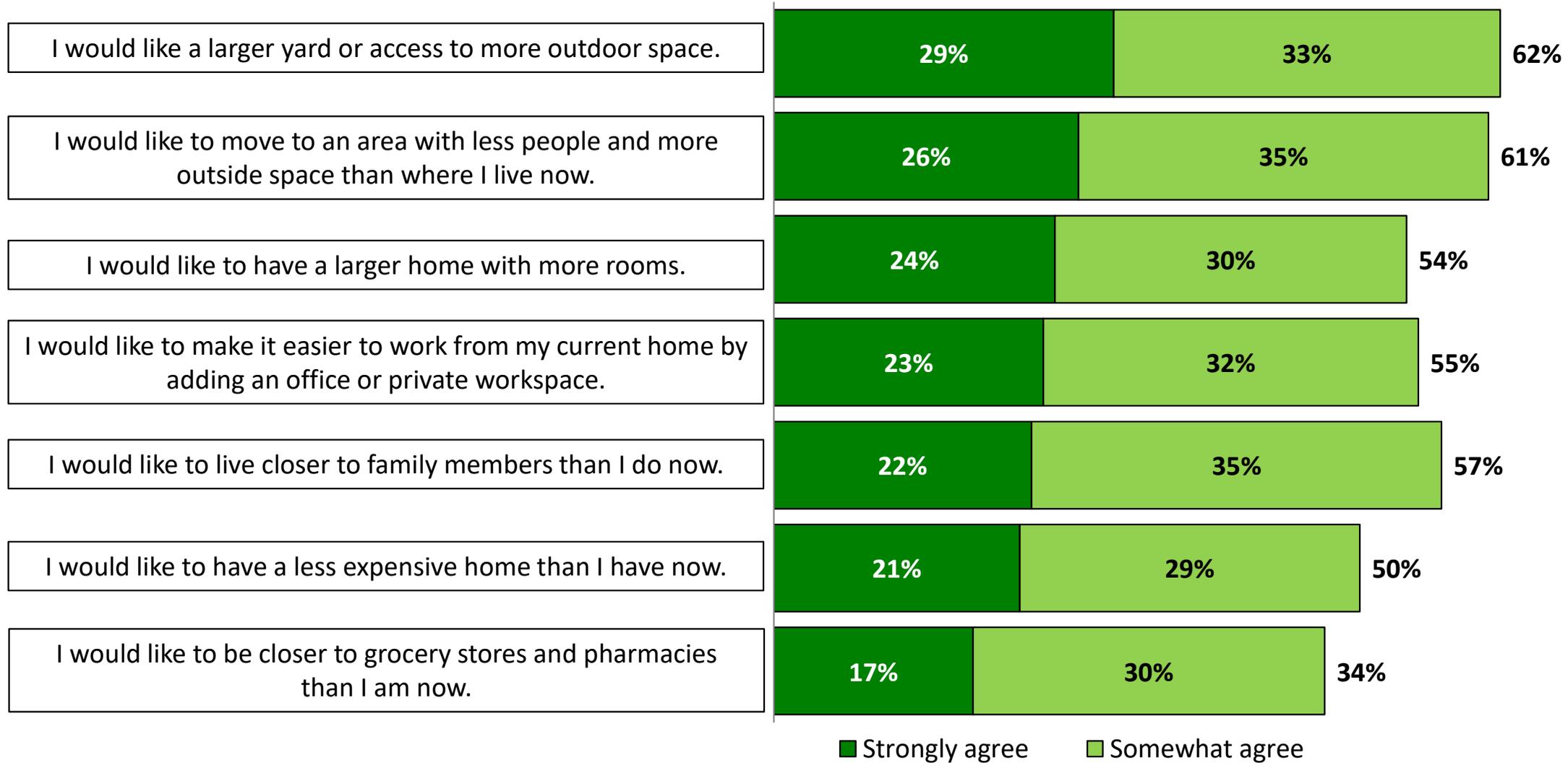
I like riding a bike

I like taking transit, like trains or buses

Now, we'd like to ask about your preferences regarding your current daily travel. For each statement, please indicate if you agree or disagree. ["current" added for July 2020 poll]

Six-in-Ten Want a Larger Yard, More Outdoor Space, and Less People Around

Desire for Change: Housing Situation and the Coronavirus Outbreak

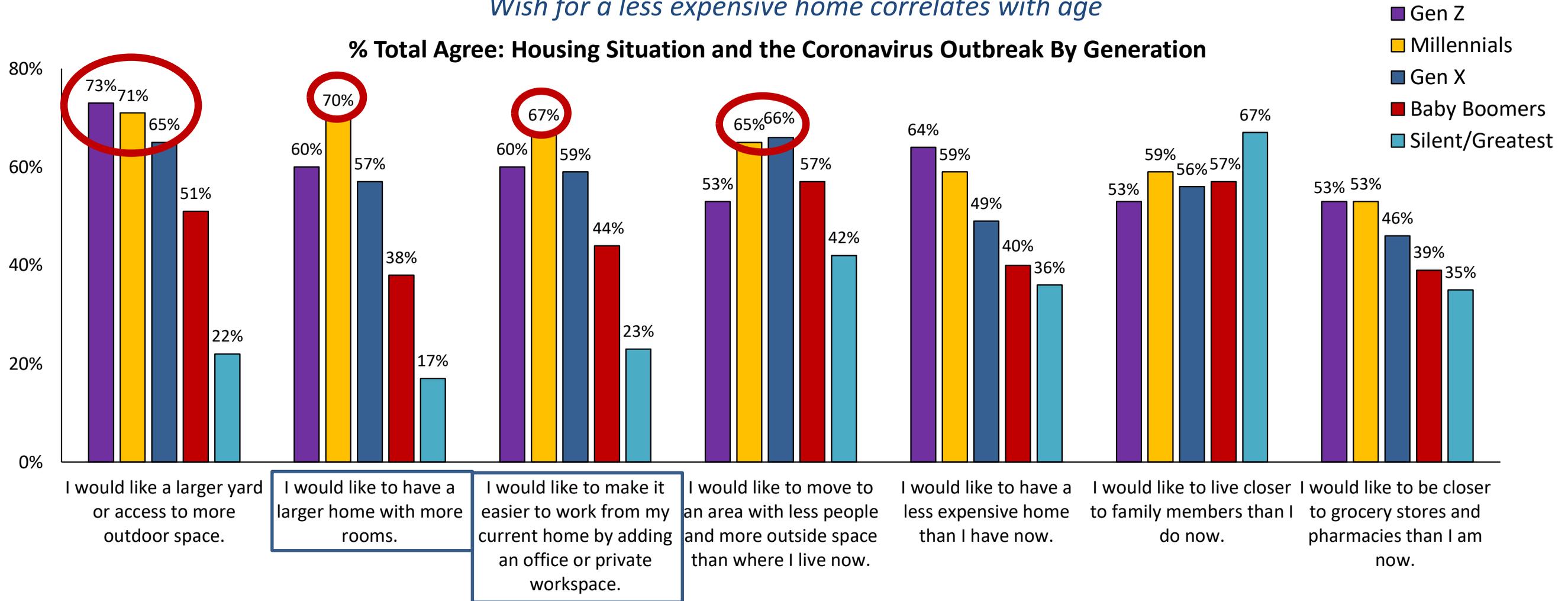


Below are some things that people have said about their housing situation and the coronavirus outbreak. As you think about your own housing situation and needs, please indicate if you agree or disagree with each one.

Millennials are Driving the Desire for Bigger Homes; Gen Z, Millennials, and Gen X All Want More Outdoor Space

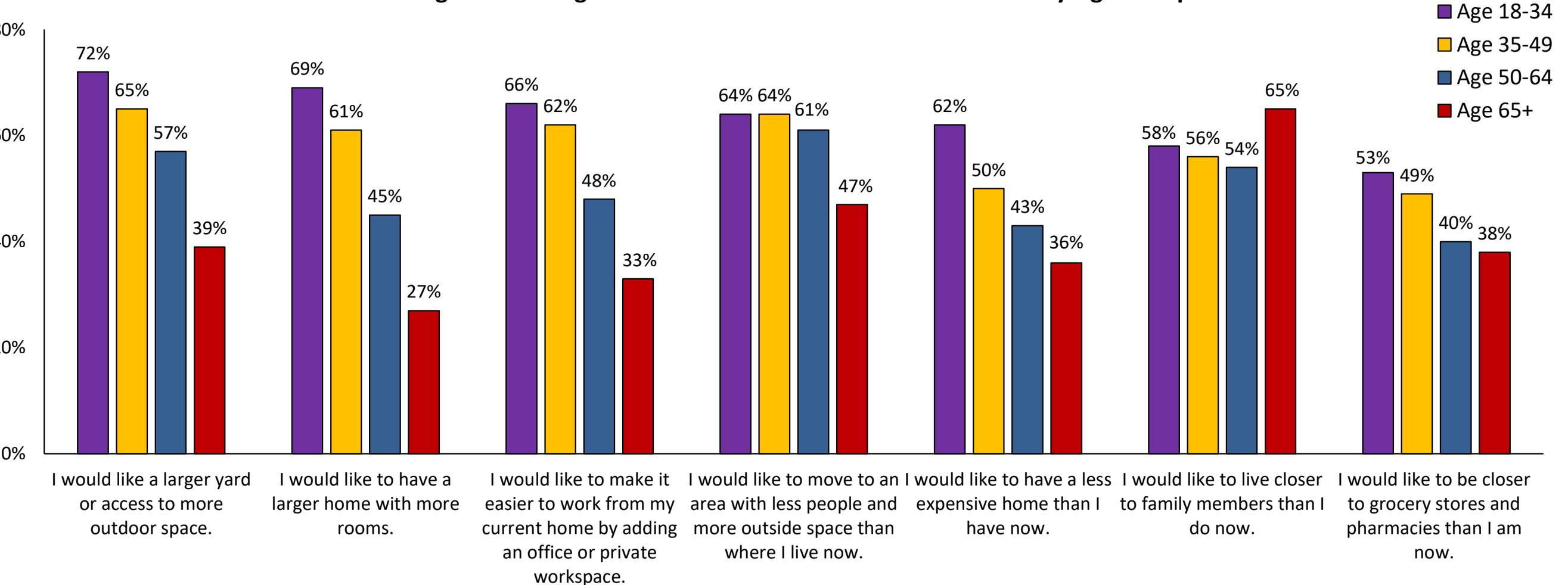
Wish for a less expensive home correlates with age

% Total Agree: Housing Situation and the Coronavirus Outbreak By Generation



Desire for Access to Outdoor Space, More Rooms, and Work-From-Home Strongest Among Those Under 50; Seniors Want to be Closer to Family

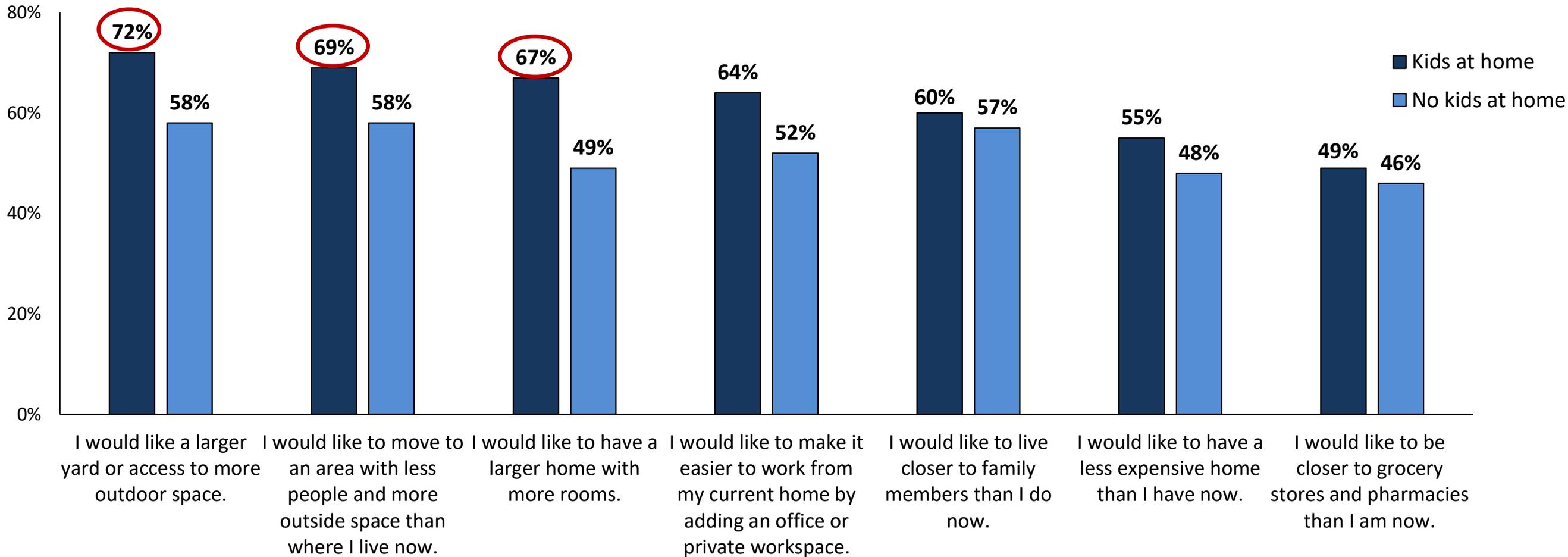
% Total Agree: Housing Situation and the Coronavirus Outbreak By Age Group



7-in-10 with Kids at Home Want More Outdoor Space and More Rooms

Majorities of those without kids also want access to more outdoor space

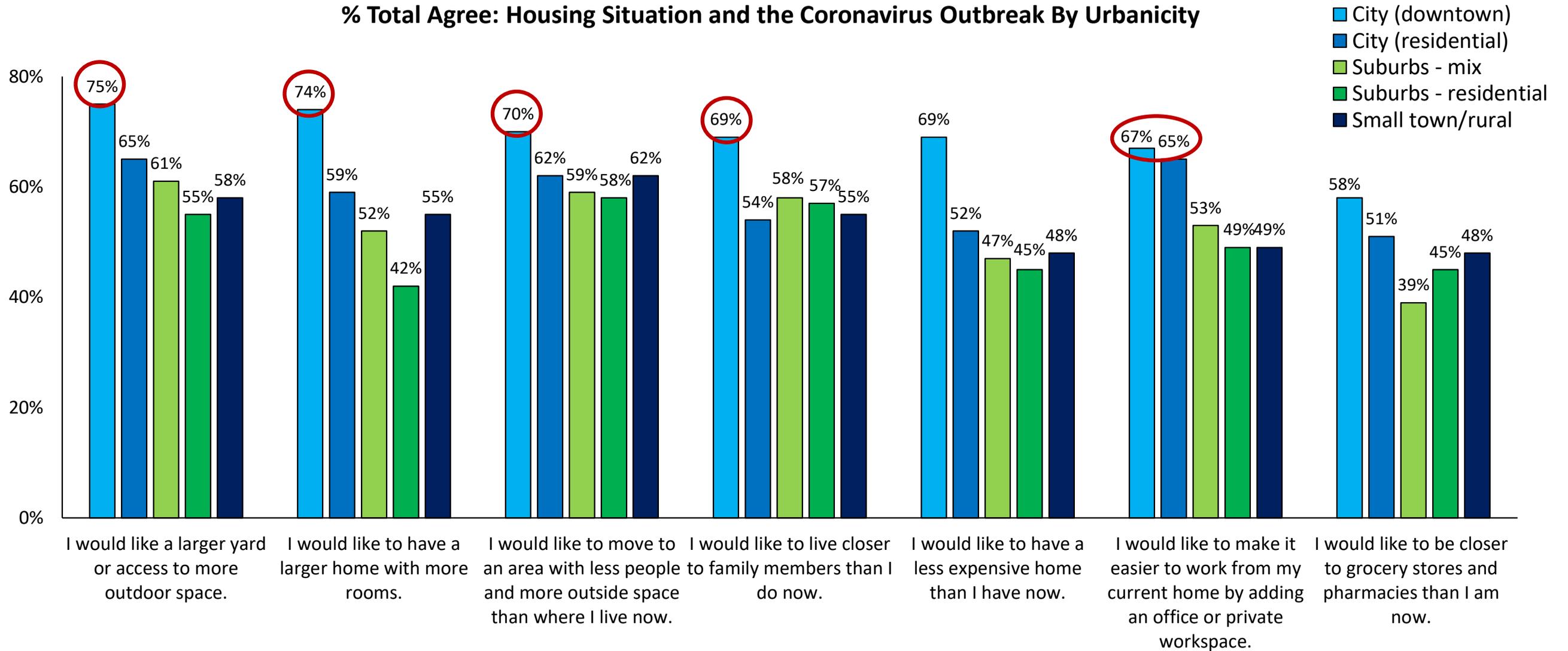
**% Total Agree: Housing Situation and the Coronavirus Outbreak
By Kids Under Age 19 at Home**



City Residents, Especially Those Downtown, Desire More Space Inside and Out

City dwellers, even in residential areas, need private workspace.

% Total Agree: Housing Situation and the Coronavirus Outbreak By Urbanicity



NATIONAL ASSOCIATION OF REALTORS®

Below are some things that people have said about their housing situation and the coronavirus outbreak. As you think about your own housing situation and needs, please indicate if you agree or disagree with each one.



Demographics

No Change: One-in-Five Living in a Detached Home Currently Would Prefer to Live in an Attached Home in a Walkable Community with Shorter Commute

JULY 2020		Lives in	Prefers	%
Mismatched	 Detached home	Apartment/townhouse in <u>walkable neighborhood</u>	 	20%
	 Attached home	Detached home in <u>conventional neighborhood</u>	 	10%
Matched	 Attached home	Apartment/townhouse in <u>walkable neighborhood</u>	 	25%
	 Detached home	Detached home in <u>conventional neighborhood</u>	 	39%
FEB 2020		Lives in	Prefers	%
Mismatched	 Detached home	Apartment/townhouse in <u>walkable neighborhood</u>	 	22%
	 Attached home	Detached home in <u>conventional neighborhood</u>	 	10%
Matched	 Attached home	Apartment/townhouse in <u>walkable neighborhood</u>	 	24%
	 Detached home	Detached home in <u>conventional neighborhood</u>	 	38%

Our July Sample vs. February Sample vs. ACS (Census) Data 2013

The survey sample is similar to the population.

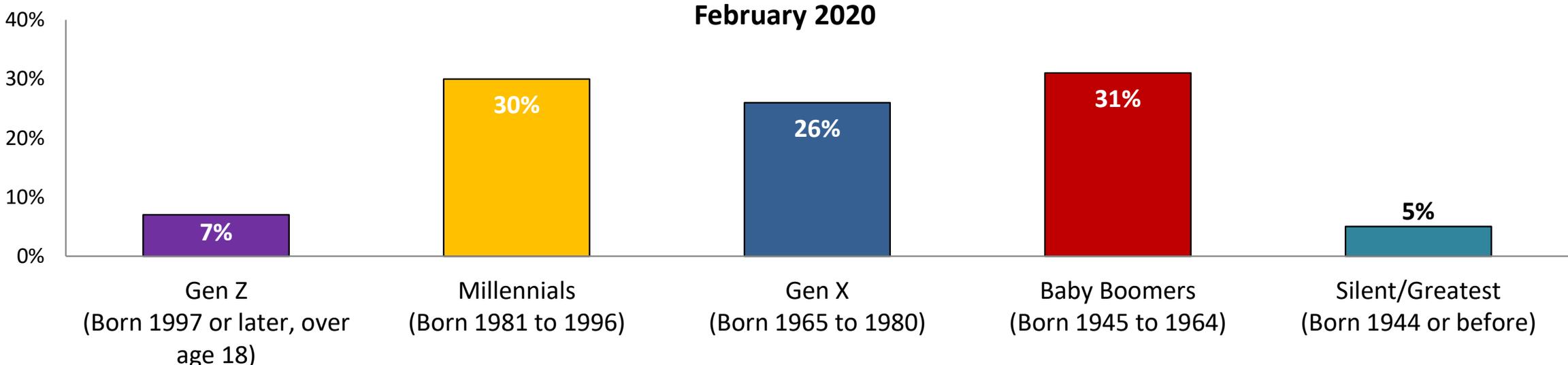
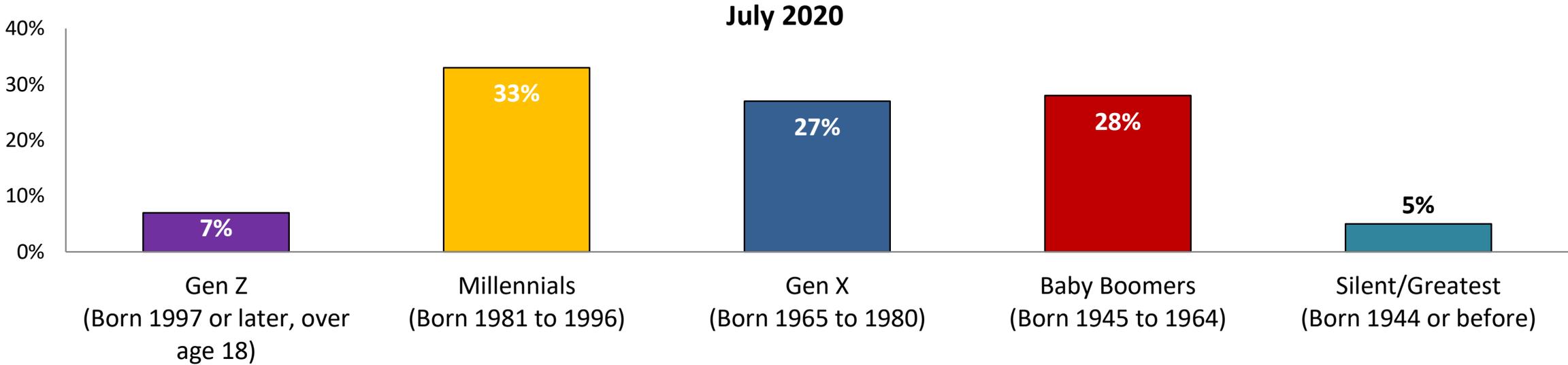
		50 largest MSAs	February 2020 Survey sample	July 2020 Survey sample
HH Income (2013 3yr ACS)	Less Than \$15,000	12%	15%	13%
	\$15,000 to less than \$50,000	32%	31%	32%
	\$50,000 to less than \$75,000	18%	18%	18%
	\$75,000 to less than \$100,000	12%	14%	14%
	\$100,000 to less than \$150,000	14%	12%	12%
	\$150,000 or more	13%	9%	10%
Gender (2013 ACS 5yr)	Male	49%	48%	48%
	Female	51%	52%	52%
Age (2013 ACS 5yr)	18 to 24 years	13%	11%	11%
	25 to 34 years	19%	20%	23%
	35 to 44 years	18%	17%	18%
	45 to 54 years	19%	16%	15%
	55 to 64 years	15%	18%	17%
	65 to 74 years	9%	13%	10%
	75 or older	7%	5%	5%
Education - 25 years and over (2013 ACS 5yr)	Did not complete high school	14%	6%	7%
	High school graduate (or equivalent)	25%	30%	28%
	Some college or Associates	28%	29%	30%
	Bachelor's degree	21%	22%	22%
	Graduate or professional degree	13%	13%	13%

Home Ownership Status by Generation Compared to Pre-Pandemic

Uptick in those living with friend or family among Gen Z and Millennials

Homeownership Status by Demographics Groups		Own	Rent	Living with friends or family
Total	Jul, 2020	49%	35%	15%
	Feb, 2020	51%	36%	13%
Gen Z	Jul, 2020	16%	28%	57%
	Feb, 2020	20%	32%	48%
Millennials	Jul, 2020	30%	46%	24%
	Feb, 2020	33%	47%	20%
Gen X	Jul, 2020	55%	37%	8%
	Feb, 2020	54%	37%	9%
Baby Boomers	Jul, 2020	70%	26%	4%
	Feb, 2020	69%	28%	3%
Silent/Greatest	Jul, 2020	77%	20%	3%
	Feb, 2020	84%	14%	2%

Distribution of Sample by Generation: July vs February



In what year were you born?

Survey Methodology

Survey Methodology

American Strategies designed this Internet survey of the top 50 metropolitan statistical areas in the United States. The survey reached 2,000 adults, 18 years or older. The survey was conducted by YouGov on July 27-August 3, 2020. YouGov interviewed 2,070 respondents who were then matched down to a sample of 2,000 to produce the final dataset. The respondents were matched to a sampling frame on gender, age, race, and education. The frame was constructed by stratified sampling from the full 2016 American Community Survey (ACS) 1-year sample with selection within strata by weighted sampling with replacements (using the person weights on the public use file).

The matched cases were weighted to the sampling frame using propensity scores. The matched cases and the frame were combined, and a logistic regression was estimated for inclusion in the frame. The propensity score function included age, gender, race/ethnicity, years of education, and region. The propensity scores were grouped into deciles of the estimated propensity score in the frame and post-stratified according to these deciles. The weights were then post-stratified on 2016 Presidential vote choice, and a four-way stratification of gender, age (4-categories), race (4-categories), and education (4-categories), to produce the final weight.

YouGov operates an online panel of over 6 million panelists across 38 countries covering the UK, USA, Europe, the Nordics, the Middle East and Asia Pacific. These represent all ages, socio-economic groups and other demographic types which allows us to create nationally representative online samples and access hard to reach groups, both consumer and professional. Their US panel has 2 million respondents.