BAY AREA IN **2015**

A ULI Survey of Views on Housing, Transportation, and Community in the Greater San Francisco Bay Area

Urban Land Institute

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ABOUT ULI

The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. Established in 1936, the Institute today has more than 35,000 members worldwide, representing the entire spectrum of the land use and development disciplines. ULI relies heavily on the experience of its members. It is through member involvement and information resources that ULI has been able to set standards of excellence in development practice. The Institute has long been recognized as one of the world's most respected and widely quoted sources of objective information on urban planning, growth, and development.

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Around the world, communities face pressing health challenges related to the built environment. For many years, ULI and its members have been active players in discussions and projects that make the link between human health and development; we know that health is a core component of thriving communities.

Through the Building Healthy Places Initiative, ULI is leveraging the power of the Institute's global networks to shape projects and places in ways that improve the health of people and communities.

Urban Land Institute San Francisco

Serving the Greater Bay Area

ULI San Francisco carries forth ULI's mission by serving the Bay Area's public and private sectors with pragmatic land use expertise and education. With over 2,200 members, ULI San Francisco is one of ULI's largest district councils.

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BAY AREA IN 2015

Bay Area in 2015 is a companion study to ULI's *America in 2015*, an examination of what people desire from the communities and places they call home. Like the national study, *Bay Area in 2015* finds generally high levels of overall satisfaction among Bay Area residents with their homes and communities, but preferences and perceptions vary depending on demographic cohort, economic standing, community characteristics, and racial or ethnic background.

Results from this survey indicate that a lack of housing affordability and options creates dissatisfaction among residents of the Greater Bay Area and contributes to a generational divide between younger, less secure residents and older, more settled generations. The findings suggest that many members of the area's millennial population—who are much more likely to move than other residents—may look to more affordable areas in search of homeownership and the housing options they desire.

The survey also finds that people from all walks of life have a strong desire to live a healthy lifestyle, but the ability to live in a home and community that provide that opportunity is not equally available. Communities and developers can do a number of things to meet more of that demand. Whether through creating more high-quality recreational space, increasing the availability of fresh and healthy food, creating more mixed-use walkable places, or encouraging a greater variety of housing types and prices, healthy communities should be a reality for those who desire to live in them.

The findings from *Bay Area in 2015* provide evidence that should feed new and ongoing dialogues among the region's business and real estate community and leaders in land use, transportation, housing, and health. We hope the findings will inform constructive discussions and action in the region.

Please visit www.uli.org/communitysurvey to delve deeper into the Bay Area findings and to see results from the national survey.

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KEY FINDINGS

40%

of Greater Bay Area residents are "very confident" that they will be able to afford the kind of home they want in the next five years.

Bay Area in 2015 is a companion study to ULI's *America in 2015*, an examination of what people desire from the communities and places they call home. The survey's key findings include the following:

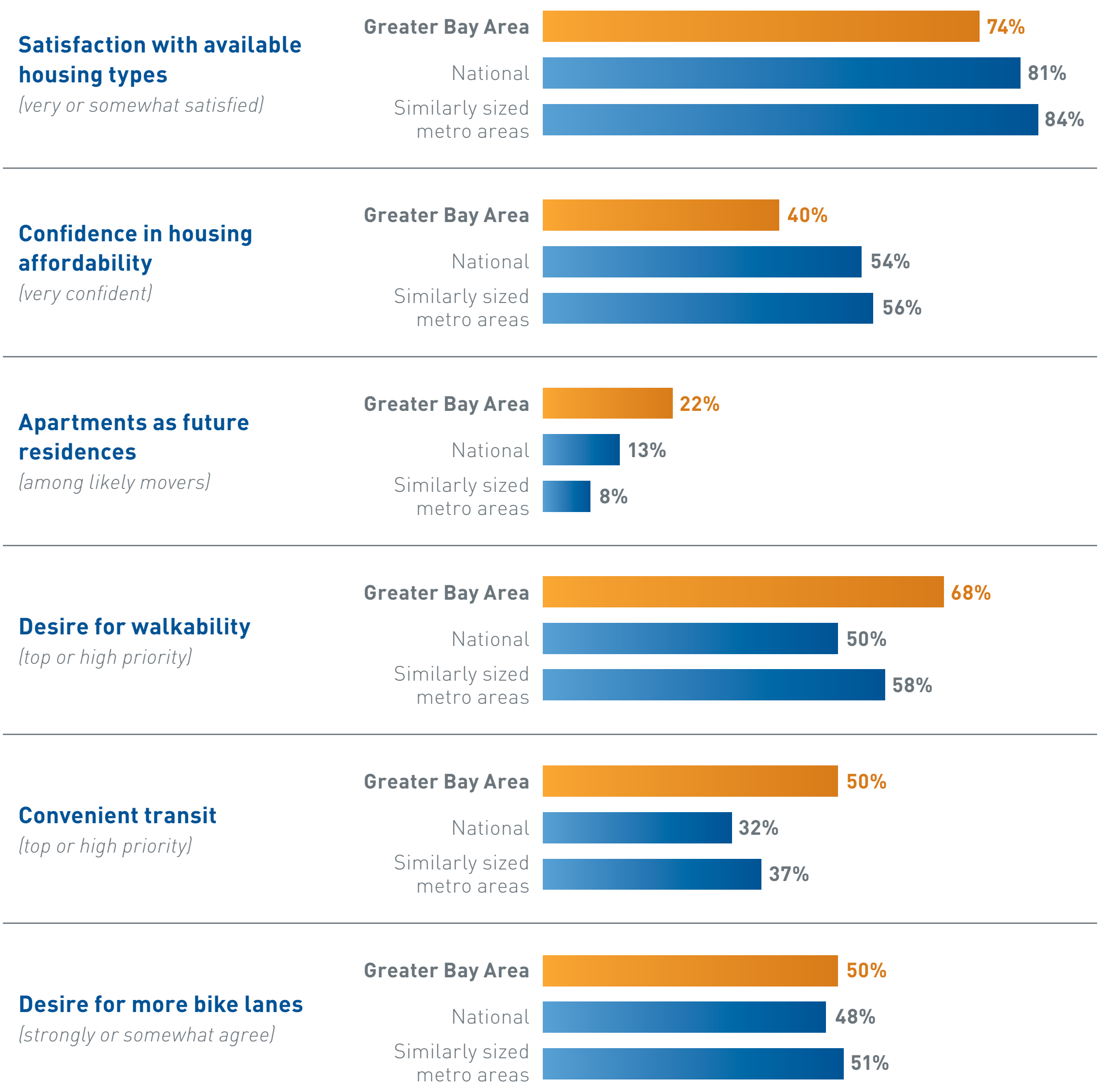
- **Range of housing choices.** Although their overall satisfaction is high, people in the Greater Bay Area are less satisfied with their housing options. That finding is particularly true for low-income residents, millennials, and people who live in the South Bay.
- **Affordability.** Affordability is a key concern, especially for millennials, who strongly desire to be homeowners but lack confidence in their ability to afford the home they want.
- **Apartment living.** Among all those who expect to move in the next five years, 22 percent in the Greater Bay Area foresee their next homes being in apartment buildings, a higher percentage than those in similar areas nationwide.
- **Walkability.** Walkability is a high priority for residents of the Greater Bay Area, who are more likely to emphasize this community attribute than the country as a whole.
- **Bike lanes.** Almost two-thirds (62 percent) of all residents of the South Bay report that they need more bike lanes in their community, compared with 44–45 percent of those in the Five-County Bay Area and North Bay.
- **Transit.** Half of Greater Bay Area residents say convenient public transportation would be a top or high priority for them if they were moving to a new home.
- **Healthy environment.** Greater Bay Area residents desire a healthy environment and fresh food above all other factors. Crime and traffic, however, disproportionately affect lower-income residents' ability to safely use the outdoors, and availability of healthy food is a concern for the Latino population.

Comparing Metropolitan Regions

To understand the significance of a finding, we compare Greater Bay Area data with national data throughout this report. In most cases, we use data that are the results for the entire country. In some cases, we also compare the Greater Bay Area data with the results for similar metropolitan areas across the country. They are called metropolitan statistical areas (MSAs) and are defined by the U.S. Census Bureau. The Greater Bay Area is made up of more than one MSA, including the San Francisco–Oakland–Fremont MSA and the San Jose–Sunnyvale–Santa Clara MSA. The entire Greater Bay Area studied in this report has a population of over 7 million people, so the report uses the MSAs with populations of between 5 million and 10 million (such as Miami–Fort Lauderdale–Pompano Beach in Florida and Dallas–Fort Worth–Arlington in Texas) as similarly sized metro areas for comparison purposes.

FIGURE 1

The Greater Bay Area in Context



Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with [the range of different types of housing to choose from in your community]?

How confident are you that you will be able to afford to own or rent the kind of home that you want in the next five years? Would you say you are very confident, somewhat confident, not very confident, or not at all confident?

How likely are you to move to a different home—one that is your primary residence—in the next five years? Would you say very likely, somewhat likely, not very, or not at all likely?

[Of those very or somewhat likely to move] In five years, what type of home do you expect to live in? An apartment building; a duplex; a rowhouse or townhouse; a single-family detached house; or something else?

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 tell me if each would be a top priority, a high but not top priority, a middle priority, or a low priority to you personally in deciding where to live. [How walkable it is, with sidewalks, pedestrian crosswalks, and so forth.] [How convenient public transportation is.]

Please tell me if you agree or disagree with each of these statements. [We need more bike lanes in my community.] Do you (agree/disagree) strongly or somewhat?

GREATER BAY AREA COMMUNITIES

Subregions Report Different Desires and Priorities

The Bay Area is often defined as a nine-county region with the city and county of San Francisco at its center and the other counties fanning out to the north, east, and south. For the purpose of reporting results from the survey, three subregions were identified, as described below. We refer to the entire area as the Greater Bay Area.

North Bay, which includes Napa, Solano, and Sonoma counties, is predominantly made up of small towns, medium-sized cities, and rural areas. It is the most heavily white and the least ethnically diverse of the three subregions. This subregion has the highest concentration of baby boomers and the lowest proportion of millennials. It also has the largest proportion of residents making under $75,000 a year. Residents tend to own their homes, and they are very likely to live in single-family, detached houses. They prefer to have a good deal of space between their homes and their neighbors and are willing to sacrifice access to public transit and the ability to walk to shopping and entertainment.

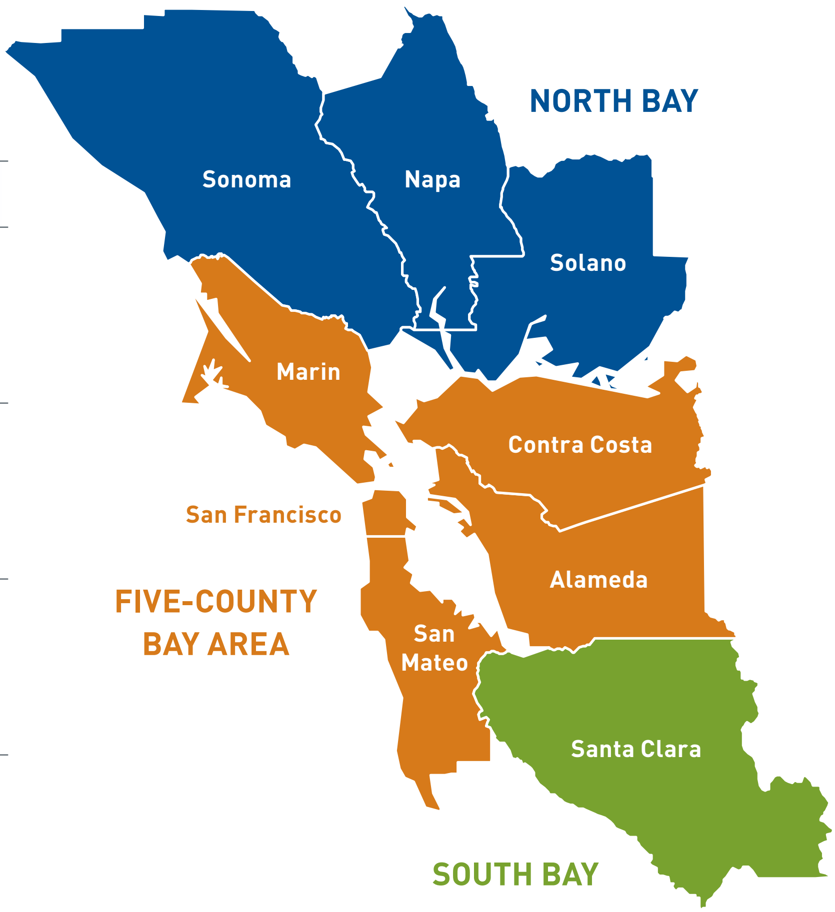
The Five-County Bay Area subregion is made up of the city and county of San Francisco and the immediately surrounding counties of Alameda, Contra Costa, Marin, and San Mateo. Within this area are a number of older, established cities—such as Berkeley, Oakland, and Hayward—in addition to suburban communities, such as Pleasanton and Walnut Creek. It is the wealthiest among the three subregions, and is marked by the highest level of satisfaction when it comes to the quality of life in the community as compared with the other two subregions. Public transportation and walkability are particularly important here, and residents are more likely than others to bike every day. They also prioritize access to fresh, healthy food. This subregion is racially diverse and has the greatest proportion of Asian residents.

South Bay, defined for the purpose of this study as consisting of Santa Clara County, is home to the cities of San Jose and Palo Alto and is the birthplace of Silicon Valley. Although Silicon Valley's boundaries have expanded into San Mateo and Alameda counties, Santa Clara County is still home to the largest concentration of high-technology companies in the Bay Area. The South Bay features the highest proportion of Latinos and millennials. Its residents are nearly as likely to rent their homes as they are to own them, and they are the least satisfied with their current living situations. But South Bay residents show the least confidence in their ability to afford the kind of home they desire. Residents of this subregion are the most likely to feel that their neighborhoods lack convenient outdoor spaces for exercising, and most would like to see more bike lanes in their communities.

FIGURE 2

The Greater Bay Area's Three Subregions

Share of population	12% 61% 27%
Key demographic indicators	
White	60% 42% 39%
Millennial	22% 32% 37%
Living in medium-sized to large cities	30% 55% 63%
Low income	24% 21% 18%



Would you describe where you live as being a rural area, a small town, a medium-sized city, a big city, a suburb within a 20-minute drive of a city, a suburb farther than a 20-minute drive to a city, or something else?

In what year were you born?

Do you consider yourself Hispanic or Latino(a)?

Stop me when I come to the category in which your total HOUSEHOLD income fell before taxes last year: less than $25,000; $25,000 up to $50,000; $50,000 up to $75,000; $75,000 up to $100,000; $100,000 or more; don't know.

HOUSING PRIORITIES AND SATISFACTION

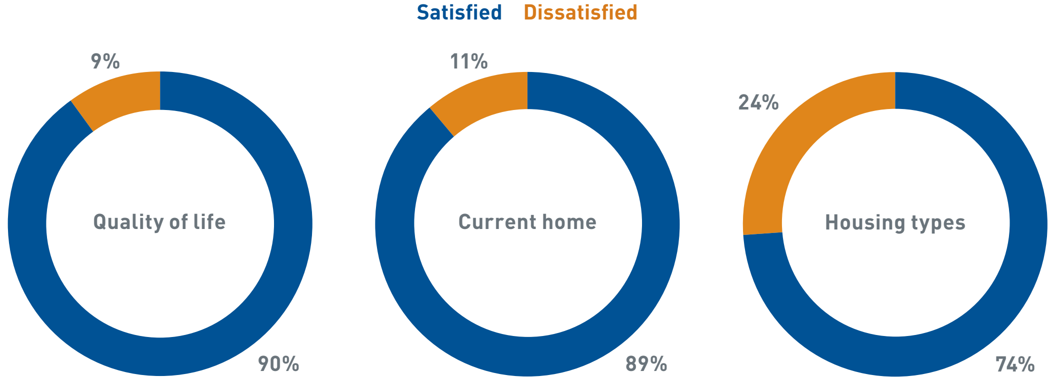
Affordability, Choices, and Expectations

Despite a high quality of life, a lack of housing choices drives some dissatisfaction in the Greater Bay Area, and residents are more satisfied with the quality of life in their communities than they are with the range of housing choices available to them. That is particularly true for low-income residents and millennials.

Affordability is another key concern, especially for millennials. Millennials have their sights set high with regard to homeownership, but they lack confidence in their ability to afford the home or apartment they want in the next five years. That is especially true when millennials are compared with the Greater Bay Area's older residents, who are more likely to be established homeowners and who report a greater degree of confidence.

FIGURE 3

Satisfaction in the Greater Bay Area
Percentage of adults



Now I would like you to tell me how satisfied you are with each of the following:

Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with [the quality of life in your community]?

Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with [the quality and size of the home you live in currently]?

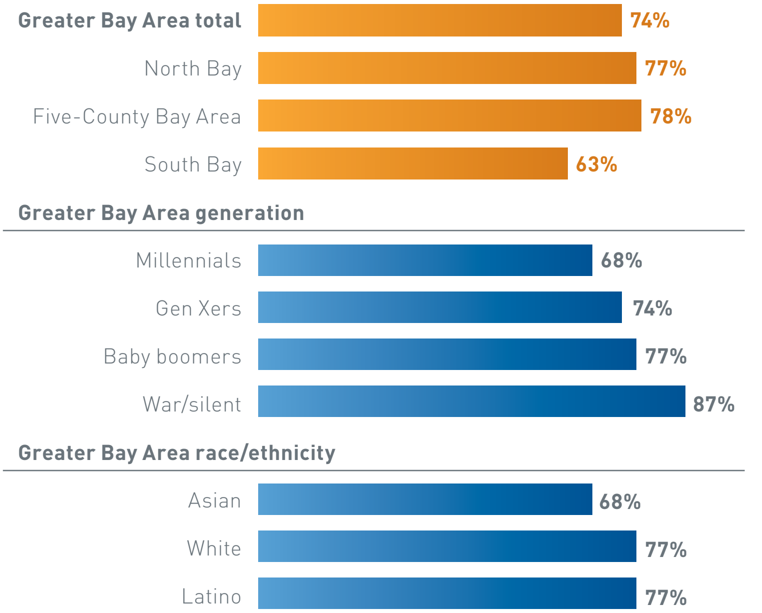
Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with [the range of different types of housing to choose from in your community]?

FIGURE 4

Satisfaction with Range of Local Housing Types

Percentage of adults who are "very satisfied" or "somewhat satisfied"

Greater Bay Area	74%
National	81%
Similarly sized metro areas	74%



Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with [the range of different types of housing to choose from in your community]?

Housing Satisfaction

By a wide margin, residents of the Greater Bay Area are generally pleased with the quality of life in the community where they live: 90 percent are satisfied versus 9 percent dissatisfied, numbers that match up closely with the national figures. However, as with the national results, pockets of dissatisfaction within the Greater Bay Area reveal some areas of concern, especially regarding the range of housing options available.

When it comes to the range of available housing types to choose from in their communities, area residents are slightly less likely to be content than are U.S. residents overall: three-quarters (74 percent) of Greater Bay Area residents are satisfied and one-quarter (24 percent) are not, compared with a wider split among national residents of 81 percent satisfied and 16 percent dissatisfied.

The area of greatest concern is the South Bay. South Bay's residents are the least satisfied with their housing options, compared with those in the other Greater Bay Area subregions. Their dissatisfaction is likely driven by a lack of affordability and availability of homes and apartments that meet residents' location, size, or housing type expectations. Only 63 percent of respondents from the South Bay subregion say they are satisfied with their local housing options, the lowest of the three Greater Bay Area subregions.

33%

of South Bay residents are not satisfied with their local housing options.

LACK OF CONFIDENCE IN HOUSING AFFORDABILITY REVEALS A GENERATIONAL DIVIDE IN THE GREATER BAY AREA.

Younger generations in the Greater Bay Area, especially millennials, are less satisfied with local housing choices than are their elders. The area's Asian residents also appear less satisfied than other groups. Almost one-third of Asian residents (31 percent) and the same share of millennials in the Greater Bay Area say they are dissatisfied with the range of housing options available to them.

Affordability

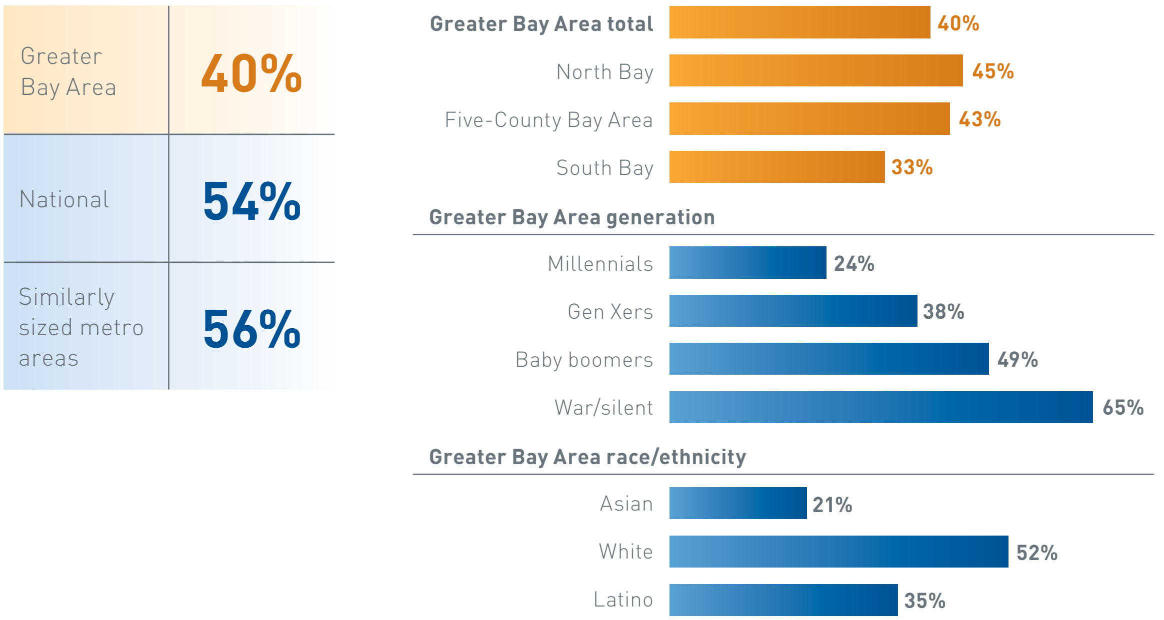
Affordability is a major concern in the Greater Bay Area, little surprise in one of the country's most expensive housing markets. Only 40 percent of Greater Bay Area residents are "very confident" that they will be able to afford to own or rent the kind of home they want in the next five years, compared with 54 percent of national respondents and 56 percent of those in similar metro areas. Among the area's subregions, those living in the South Bay are the least likely to be very confident (33 percent) that they will be able to afford homes in the next five years.

Both Asians and millennials in the Greater Bay Area are also less likely to be confident that they can afford the home they want than are other area residents, with only 21 percent and 24 percent, respectively, saying

FIGURE 5

Confidence in Housing Affordability

Percentage of adults who are "very confident" in their ability to afford desired home in next five years



How confident are you that you will be able to afford to own or rent the kind of home that you want in the next five years? Would you say you are very confident, somewhat confident, not very confident, or not at all confident?

they are very confident. This concern about affordability is likely a major factor driving the dissatisfaction among these groups when it comes to their housing choices.

Moreover, millennials in the Greater Bay Area show much less confidence relative to older residents, revealing a potential generational divide within the local population. In the Greater Bay Area, only 24 percent of millennials and only 38 percent of gen Xers are very confident that they will be able to afford to own or rent the home they want in the next five years, compared with 49 percent of Greater Bay Area baby boomers and 65 percent of the war/silent generation. Nationally, confidence is much more even across the generations, with just over half of each age group (between 52 percent and 57 percent and within the margin of error for the survey) showing this high level of confidence. The implication is that the youngest residents of the Greater Bay Area feel they are much more precariously housed when compared with their elders. The generational gap in confidence, combined with high hopes for ownership, could mean younger residents look elsewhere for the American dream.

74%

of millennials in the Greater Bay Area are likely to move in the next five years.

Movers

Bay Area residents are on the move just as much as Americans nationally, with 48 percent saying that they are somewhat or very likely to move in the next five years, but their expectations and experiences differ from the rest of the nation.

Both nationally and in the Greater Bay Area, millennials are the largest cohort of potential movers over the next five years; 74 percent say they are considering a move, making this young (and large) generation a sizable driver of demand for new and existing housing of all kinds.

Homeownership Expectations

Support for homeownership among likely movers nationwide and in the Bay Area is high. Seventy percent of likely movers in the Greater Bay Area expect to own rather than rent their next homes—very similar to the national figures—despite the fact that area residents are currently less likely to own their homes than are U.S. residents overall. In this survey, 55 percent of residents in the Greater Bay Area say they own their homes, compared with 62 percent nationally and 68 in similar metro areas. However, as discussed previously, this optimistic outlook toward becoming a homeowner is countered by a lack of confidence that they will be able to afford it, especially for the area's millennial residents.

HOMEOWNERSHIP EXPECTATIONS IN THE GREATER BAY AREA REMAIN HIGH DESPITE LOW CURRENT HOMEOWNERSHIP LEVELS.

Demand for Apartment Living

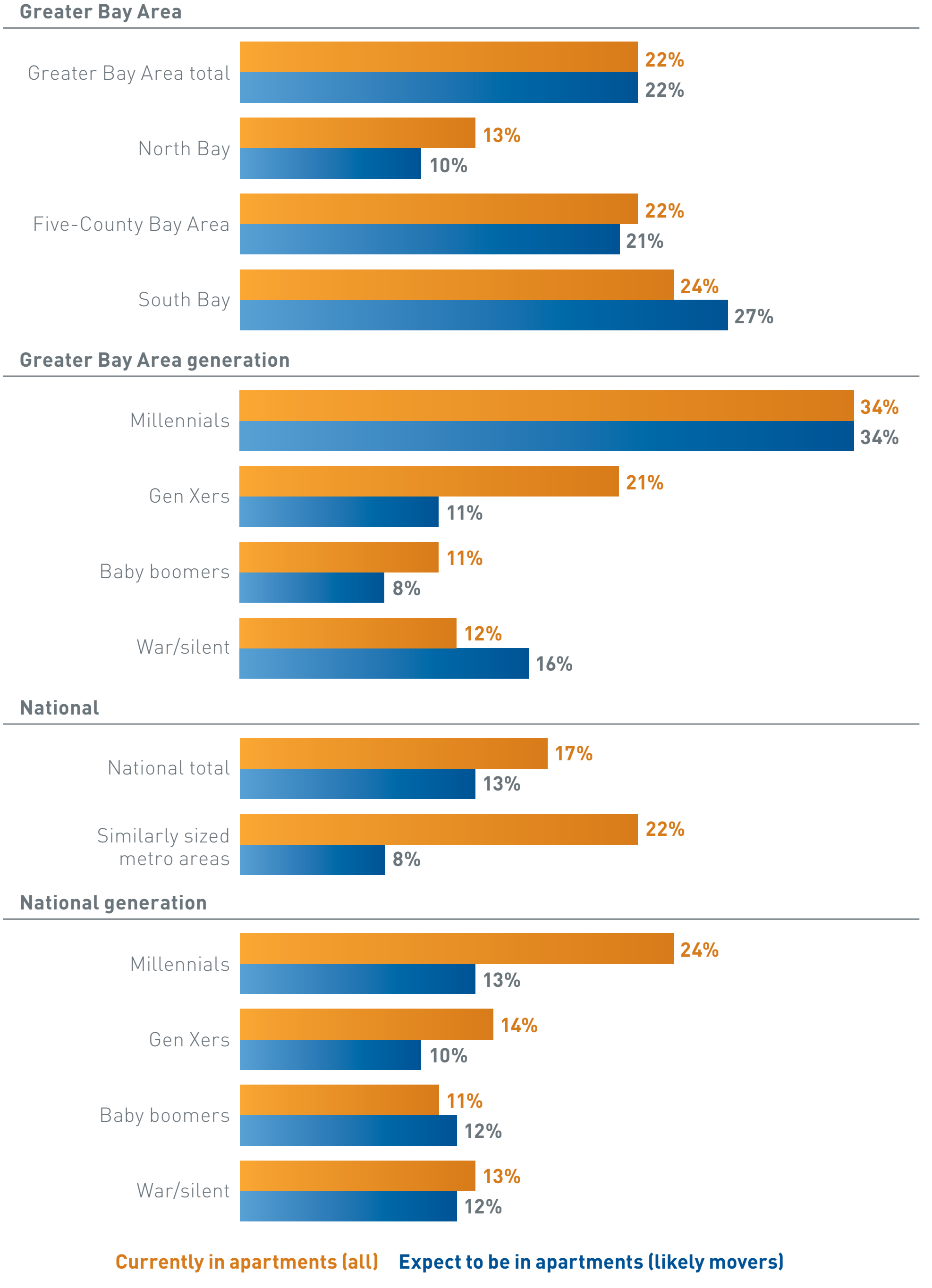
Among all those who expect to move in the next five years, 22 percent in the Greater Bay Area foresee their next homes being in apartment buildings, the same share that currently live in apartments and higher than the 13 percent among national movers. In metro areas similar to the Greater Bay Area, the expectations for continued apartment dwelling among likely movers drops significantly—from 22 percent to only 8 percent. For the South Bay and the Five-County Bay Area subregions (where most local apartment dwellers live), the expectations among likely movers roughly match the current shares, with the South Bay showing the greatest tendency toward apartment living.

Specifically among the Bay Area's likely millennial movers, apartments have more staying power than in other areas of the country. Nationally, although 24 percent of millennials currently live in apartments, only 13 percent of likely movers say they plan to continue living in them. But in the Bay Area, millennials appear to like their apartments, and they say they are staying put: 34 percent currently live in apartments, and the same share of likely millennial movers say they plan to remain apartment dwellers in the next five years.

FIGURE 6

Apartments as Current and Future Residences

Percentage of adults who are "somewhat likely" or "very likely" to move in next five years



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; 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?

How likely are you to move to a different home—one that is your primary residence—in the next five years? Would you say very likely, somewhat likely, not very likely, or not at all likely?

[Of those very or somewhat likely to move] In five years, what type of home do you expect to live in? An apartment building; a duplex; a rowhouse or townhouse; a single-family detached house; or something else?

APARTMENTS HAVE STAYING POWER FOR THE GREATER BAY AREA'S MILLENNIALS.

Downsizing

Older residents are more likely to be comfortable and settled in homes that they may have purchased long ago. Higher prices for homes—like those seen in the Greater Bay Area—are primarily problematic for people who are not yet homeowners. Although millennials are remaining in apartments and delaying homeownership, many in the older generations have benefited from the higher home equity provided by rising values. Reflecting their somewhat higher level of confidence, downsizing is a less common expectation among the Greater Bay Area's older generations than it is nationally: among likely movers, only 27 percent of baby boomers and 37 percent of the war/silent generation expect to move to a smaller home, compared with 43 percent and 47 percent, respectively, of those groups nationally.

COMMUNITY DESIGN PRIORITIES AND SATISFACTION

Desire for Walking, Biking, Transit, and Healthy Living

Walkable communities and transit hold broad appeal. Alternatives to automobiles in the Greater Bay Area are strongly desired by a cross section of the population. Walkable communities and public transportation are valued highly regardless of income and community type, but some community design–related barriers to walkability still exist.

Parks, open space, and healthy food are important to people, but they are not evenly available throughout the Greater Bay Area. Residents desire a healthy environment and fresh food above all other factors, a result that is consistent across demographic groups. Crime and traffic disproportionately affect lower-income residents in the Greater Bay Area, and availability of healthy food is a concern for the Latino population.

Community Design Priorities

For residents of the Greater Bay Area, the desire to get around by using public transit, walking, and biking is great—more so than for Americans generally. These sentiments cross community types and demographic groups, but access to communities that support this kind of lifestyle is not as even.

Walkability is a high priority for residents of the Greater Bay Area, who are more likely to emphasize this community attribute than the country as a whole. Among Greater Bay Area residents, 68 percent say a community's walkability—with sidewalks, crosswalks, and so forth—is a top or high priority, compared with 50 percent of Americans generally and 58 percent in similar metro areas.

The desire for community walkability is high across areas and demographic groups. Although 76 percent of people in the Greater Bay Area who describe their residence as a "big city" rate walkability as a top or high priority, 67 percent of suburban residents and 61 percent of people in rural areas and small towns also agree. People of all ages, including 72 percent of millennials and 67 percent of baby boomers, also favor walkable neighborhoods over others.

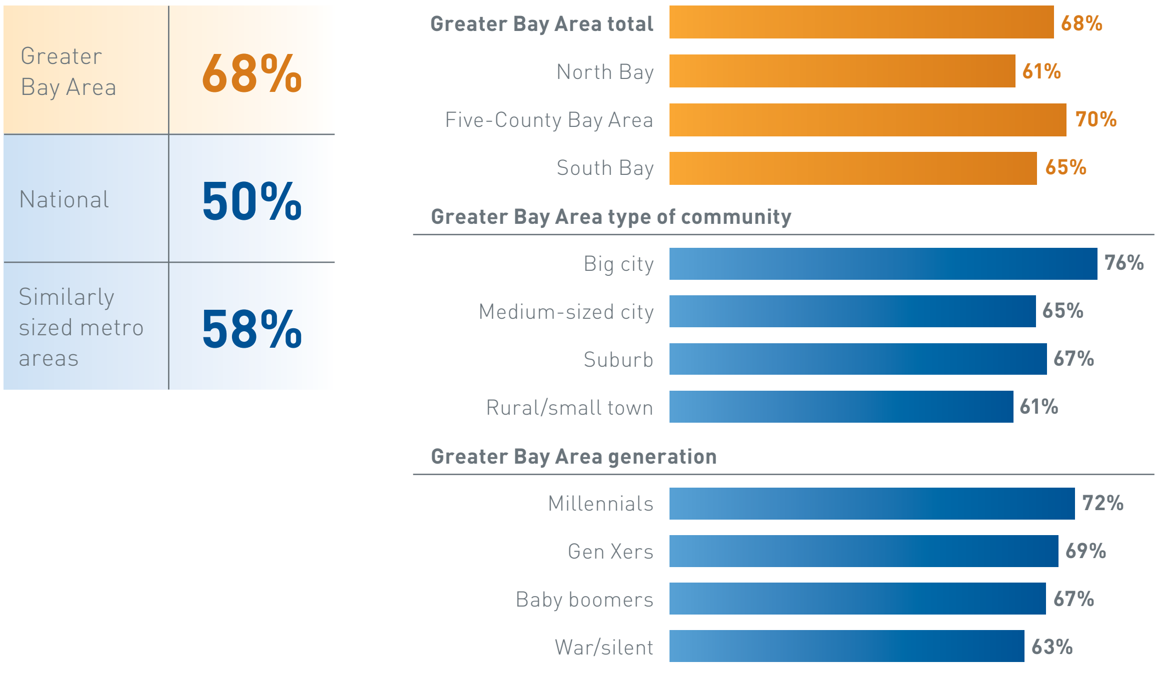
68%

of Bay Area residents say walkability is a top or high priority when considering where to live.

FIGURE 7

Priority Placed on Neighborhood Walkability

Percentage of adults rating a community's walkability as a "top" or "high" priority



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 tell me if each would be a top priority, a high but not top priority, a middle priority, or a low priority to you personally in deciding where to live. [How walkable it is, with sidewalks, pedestrian crosswalks, and so forth.]

Compact land use patterns are an essential ingredient in walkability, and they are even more meaningful when residents have destinations to walk to. In the Greater Bay Area, however, 38 percent of people feel that it is too far to walk to shopping and entertainment in their neighborhoods. That is also true for half of all those who say they live in suburbs (47 percent) and rural areas and small towns (50 percent). The Greater Bay Area's cities stand out as superior in this regard, with 70 percent or more of city residents saying shopping and entertainment are close enough to walk to.

Biking

Biking is becoming more popular for people of all ages to stay active. And in the Greater Bay Area, 29 percent of people say they walk or bike to a destination nearly every day, more than the 18 percent of all Americans and 15 percent of those in similar metro areas who do so. But as with walkability, community design can play a role in residents' ability to use bicycles as a reliable means of transportation. In the Greater Bay Area, half of residents feel their neighborhoods need more bike lanes. Latino

Sergio Ruiz

and Asian residents are more likely to say so (60 percent and 54 percent, respectively), as are low-income residents (57 percent) and millennials (59 percent).

One standout in the Greater Bay Area is that almost two-thirds (62 percent) of all residents of the South Bay report that they need more bike lanes in their community, compared with only 44–45 percent of those in the Five-County Bay Area and North Bay. This result is likely a reflection of the spread-out land use patterns in Santa Clara County and high traffic volumes, combined with a road and highway system designed more for automobiles than for pedestrians and cyclists; in fact, 30 percent of residents in the South Bay say traffic makes it unsafe to walk in their neighborhood.

Public Transit

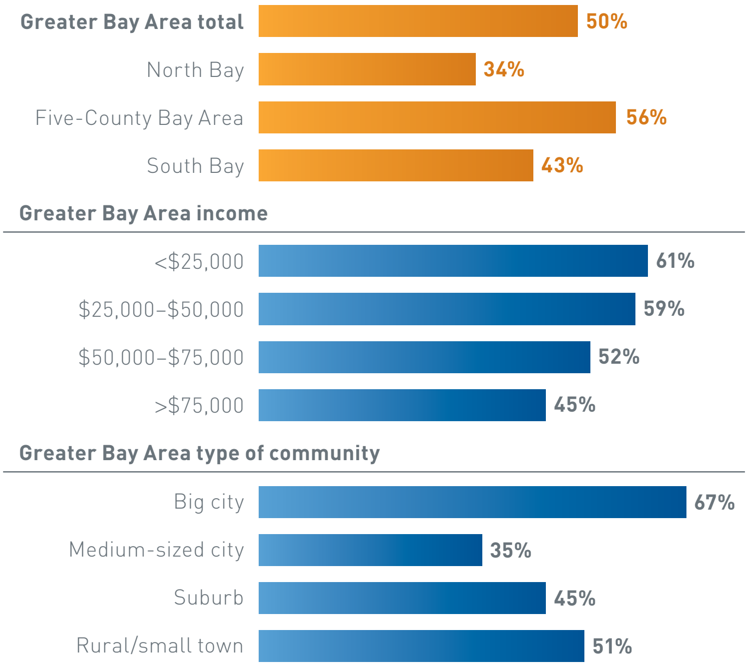
Half of Greater Bay Area residents say convenient public transportation would be a top or high priority for them if they were moving to a new home. That compares with only 32 percent of the people nationally who are so inclined, and 37 percent in similar metro areas. Much of the

FIGURE 8

Priority Placed on Convenient Public Transportation

Percentage of adults rating convenient public transportation in a neighborhood as a "top" or "high" priority

Greater Bay Area	50%
National	32%
Similarly sized metro areas	37%



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 tell me if each would be a top priority, a high but not top priority, a middle priority, or a low priority to you personally in deciding where to live. [How convenient public transportation is.]

interest in public transit in the region comes from residents who live within the Five-County Bay Area: 56 percent of those residents say the convenience of public transportation is a top or high priority in choosing where to live, followed by 43 percent of South Bay residents, but only 34 percent of the residents of North Bay.

Not surprisingly, lower-income residents also tend to care more about the convenience of public transportation, with 61 percent of residents with incomes below $25,000 throughout the Greater Bay Area calling it a top or high priority. Even so, 45 percent of those making over $75,000 a year, 45 percent of suburban residents, and 51 percent of those who live in rural areas and small towns within the Greater Bay Area feel it is a priority for them, showing that desire for quality public transit access crosses boundaries of both income and place.

Infrastructure such as bike lanes and land use patterns that allow increased proximity of housing and services, such as shopping and entertainment, would facilitate walking and biking, and foster more car-optional communities.

Healthy Environment

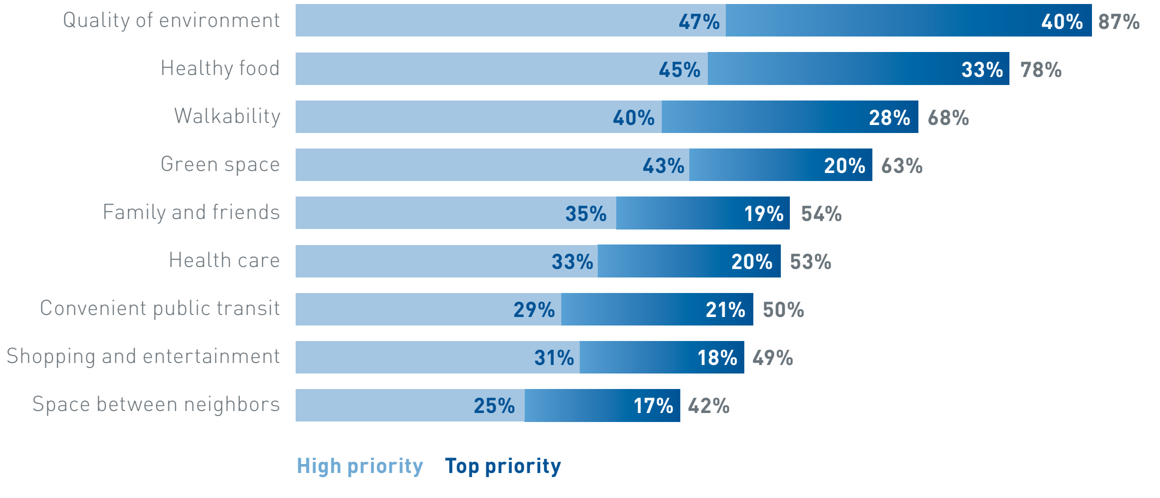
Like people nationally, the great majority of Greater Bay Area residents (87 percent) call the quality of the environment, including air and water quality, a top or high priority when choosing where to live. This factor consistently scores higher than any other in both the national and Bay Area surveys. The strong preference for environmental quality also spans generations and demographic groups.

Although residents of the Greater Bay Area highly value the environment and open space, there are indications that such space does not need to be in their own backyards in order to meet their needs. Sixty-three percent of area residents say the amount of green space and the number of parks and recreation areas would be a top or high priority in a decision about where to live, as do 55 percent of the national population and 60 percent in similar metro areas. Just 42 percent of Greater Bay Area residents say having a lot of space between themselves and their neighbors is a top or high priority, compared with 53 percent nationally and 48 percent in similar metro areas.

FIGURE 9

Community Attribute Priorities

Percentage of adults in the Greater Bay Area rating community attribute as a "top" or "high" priority



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 tell me if each would be a top priority, a high but not top priority, a middle priority, or a low priority to you personally in deciding where to live. [How convenient public transportation is.] [How walkable it is, with sidewalks, pedestrian crosswalks, and so forth.] [Whether it's a walk or a short drive to doctors, hospitals, or clinics you use or might need.] [Whether it's a walk or a short drive to shopping and entertainment.] [The availability of fresh, healthy food in the community.] [Having a lot of space between you and your neighbors.] [The quality of environment, including air and water quality.] [The amount of green space, parks, and recreation areas.] [How close the community is to your family and friends.]

Income and Barriers to Healthy Lifestyles

Many groups who highly value the environment and open space also have the least access to them or experience barriers that keep them from taking the most advantage of them. One-third (36 percent) of Greater Bay Area residents say their neighborhoods lack convenient outdoor spaces to exercise. One-quarter (26 percent) believe that traffic makes it unsafe to walk in their neighborhoods, and a similar share (24 percent) say crime makes it unsafe to walk. The strongest relationship in the survey on these factors is the income of the respondent: those with the lowest incomes are more likely to believe that both traffic and crime make it unsafe to walk in their communities. These results imply not only that the neighborhoods where the lowest-income residents live are more likely to experience traffic and crime, but also that for a substantial share of people, these conditions are significant enough to create barriers to physical activity.

LOW-INCOME RESIDENTS EXPERIENCE BARRIERS TO PHYSICAL ACTIVITY.

Furthermore, 78 percent of Greater Bay Area residents call the availability of fresh, healthy food in their community a top or high priority, as do 73 percent of all Americans. Low-income residents are particularly likely to give healthy food access prime importance (43 percent say it's a top priority), as are residents under age 30 (top priority for 40 percent) and Latinos (top priority for 40 percent).

FIGURE 10

Income, Environment, and Walking
Percentage of adults in the Greater Bay Area

	Environment is a top or high priority	Community lacks outdoor space to exercise*	Traffic in neighborhood makes it unsafe to walk*	Crime in neighborhood makes it unsafe to walk*
Greater Bay Area total	**87%**	**36%**	**26%**	**24%**
Income				
<$25,000	81%	47%	38%	38%
$25,000–$50,000	86%	42%	31%	34%
$50,000–$75,000	84%	46%	31%	25%
>$75,000	89%	29%	19%	16%

*strongly or somewhat agree

I would like you to tell me if each would be a top priority, a high but not top priority, a middle priority, or a low priority to you personally in deciding where to live. [The quality of environment, including air and water quality.]

Please tell me if you agree or disagree with each of these statements. [My neighborhood lacks convenient outdoor spaces to run, walk, or exercise.] [Traffic in my neighborhood makes it unsafe to walk.] [Crime in my neighborhood makes it unsafe to walk.] Do you (agree/disagree) strongly or somewhat?

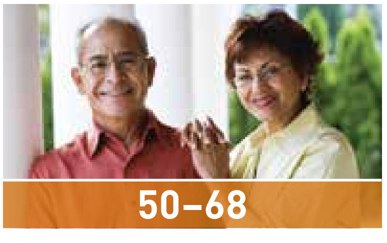
Most residents of the Greater Bay Area (88 percent) also say it is easy for them to find fresh, healthy food in their communities; Latinos are more likely to disagree, with about one-fifth (18 percent) saying they cannot easily find fresh food nearby, compared with only 10 percent of whites and 6 percent of Asians. Although these numbers are small relative to the overall population, they point to a potential concern that can affect the community's health and well-being.

GREATER BAY AREA GENERATIONS

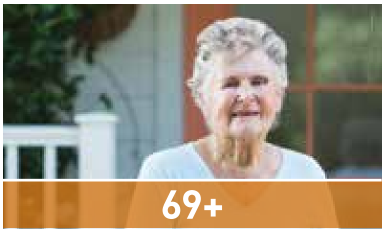
Priorities and Desires from Young to Old

Millennials are the most likely age group to rent their homes and to plan on moving in the next five years. The millennial generation has the highest proportions of Latinos and Asians, and they are also the most likely to have low incomes. They are more likely to live in apartment buildings in urban areas, and if they expect to move, they are the most likely group to plan to move into an apartment building. They feel strongly that the quality of the environment, including air and water quality, is a top priority in choosing where to live. They are also the most likely age demographic to say public transport is a priority and to say they want more bike lanes in their neighborhoods.

Generation X members are the wealthiest age demographic, with more than half making upward of $75,000 a year. They are most likely to live with children under 18 and to say that buying a home is a good investment. When they move, they are the most likely generation to be seeking a detached, single-family home or a townhouse, and the most likely to want to buy. Gen Xers are particularly likely to prefer an ethnically diverse neighborhood.



Baby boomers are the most likely set to own their homes and the most likely to live currently in single-family detached houses. They feel the least threatened by crime in their communities, and they are the most likely to prefer a community with a variety of ages. Residents in the baby boom generation are particularly likely to say their ideal home would be either rural or in a suburb farther away from a city than a 20-minute drive. They are more likely than younger residents to say they are "very satisfied" with the quality of life in their communities, and they tend to feel they have enough time to bike and walk around in their neighborhoods.



War/silent generation residents express satisfaction 96 percent of the time with their current home. They are most likely to be satisfied with their quality of life and the range of available housing in their communities. They are also the most likely to own their homes. These oldest generations are the least likely to live in an urban environment and the most likely to be rural residents. They are more likely than most to say their neighborhood lacks convenient outdoor spaces for walking and exercising. They are the most likely to be confident in their ability to afford the home they want in the next five years. And among movers, they are the most likely to be looking to downsize. About two-thirds of all war babies and members of the silent generation say living near doctors, hospitals, and clinics is a high or top priority.

ABOUT THE SURVEY

The representative telephone survey of 701 adults residing in the nine-county San Francisco Bay Area was conducted for ULI by Belden Russonello Strategists. The survey was conducted through live interviews on landlines and cellphones from February 4 to 16, 2015. The data have been weighted by age, race, gender, and region to match the adult population of the region.

Generally speaking, the margin of sampling error for the results of a probability sample of this size is plus or minus 3.7 percentage points at the 95 percent confidence level. For smaller subgroups of the survey, such as the generations and low-income groups, the margin of error will be higher. National results, detailed methodology, crosstab tables, and the questionnaire with response totals are available at www.uli.org/communitysurvey.

Belden Russonello Strategists LLC

Belden Russonello Strategists LLC is a nationally recognized survey and communications firm. Since 1982, Belden Russonello Strategists LLC has helped nonprofit organizations, 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.

Acknowledgments

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BAY AREA IN 2015 reports on survey results on attitudes toward housing, community, and transportation in the San Francisco Bay Area. ULI's Building Healthy Places Initiative, the Terwilliger Center for Housing, and ULI San Francisco partnered with Belden Russonello Strategists LLC to conduct a statistically representative survey of 701 adults living in the Bay Area. The results of the survey provide an important look at residents' attitudes toward and expectations regarding a variety of community characteristics.

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