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Millennials and Mobility in the Modern West

February, 2015



Who are Millennials?



- Born between **1982** and **2003**
- **Largest, most diverse**, and **most multimodal** generation in US history*
- Connect through **technology**
- Also known as Generation Y, Echo Boomers, Generation Next, Generation We, Generation Me, Generation Net, Global Generation

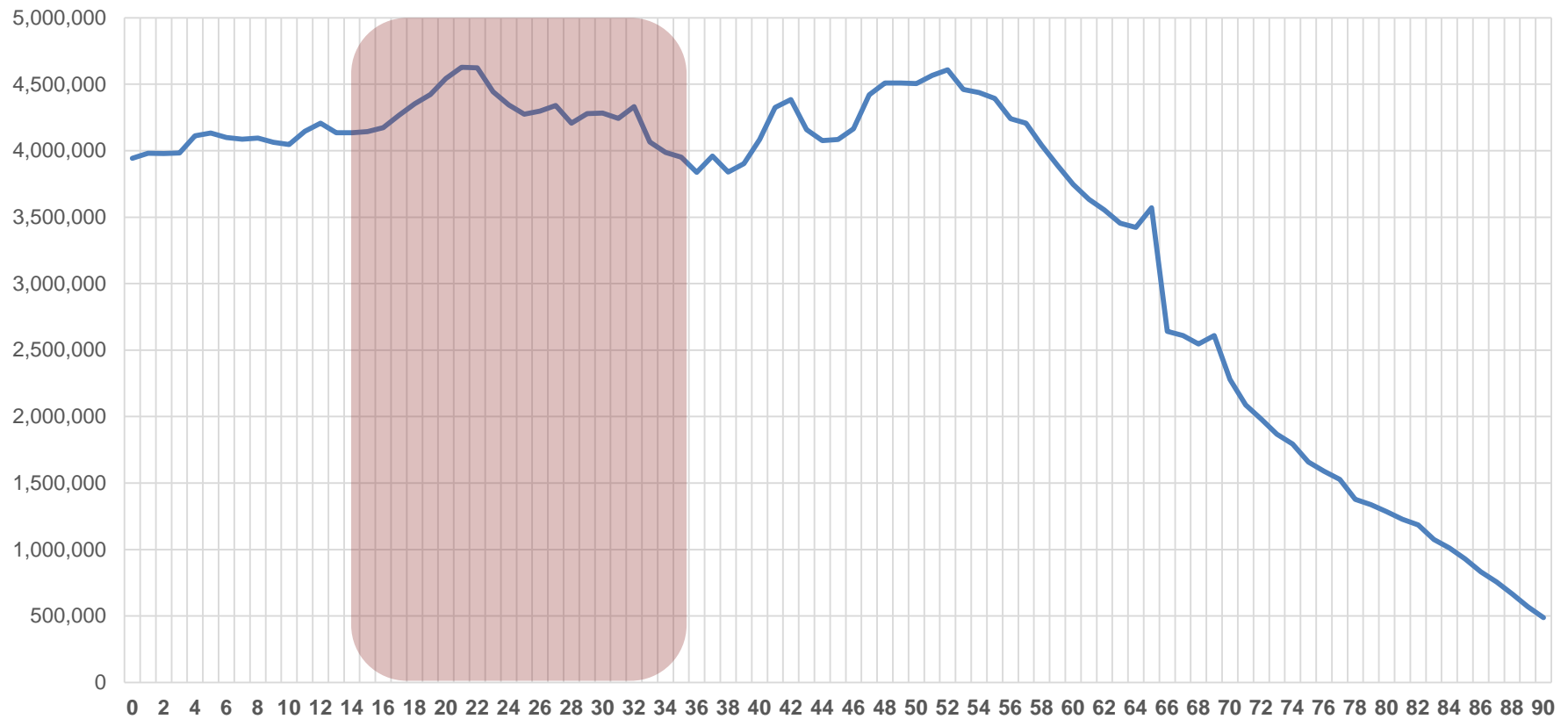


Image Source: Matt Bors, The Generation We Love to Dump On, Special to CNN, July 2013

Echo Boom



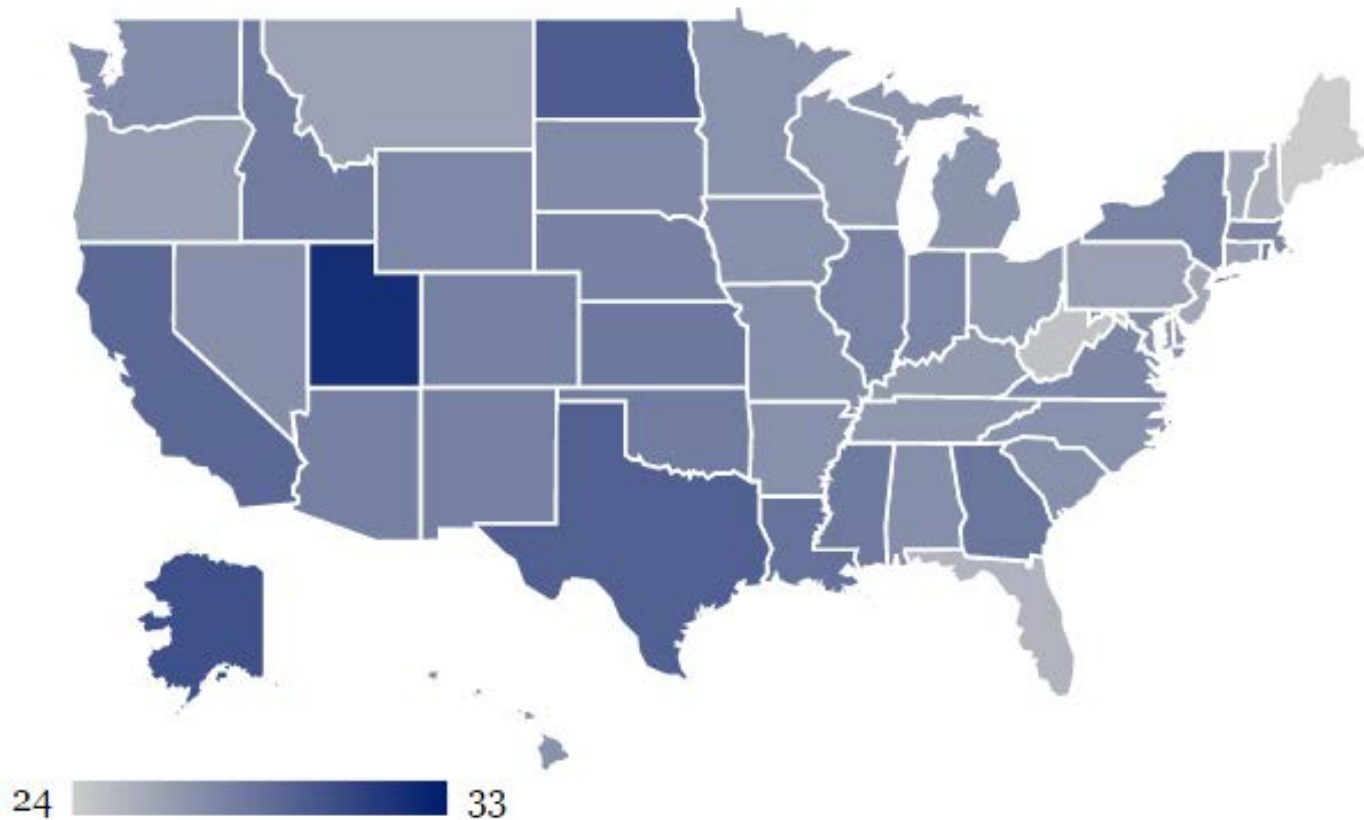
U.S. Annual Estimates of the Resident Population by Single Year of Age (2013)



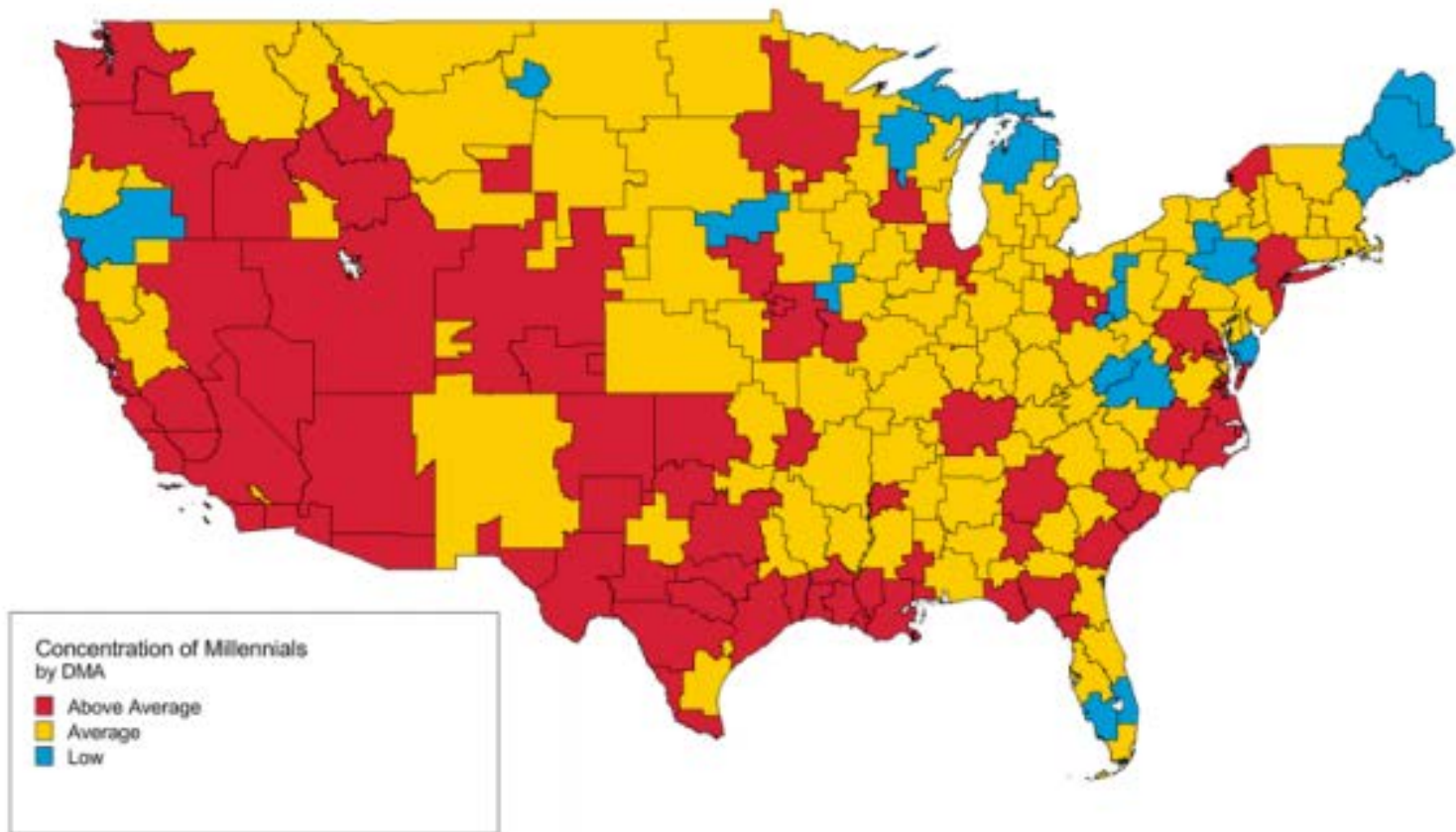
Millennial Populations



Millennial % of Population by State



Millennial Populations



Source: Nielsen Pop-Facts, 2013

Racial Diversity

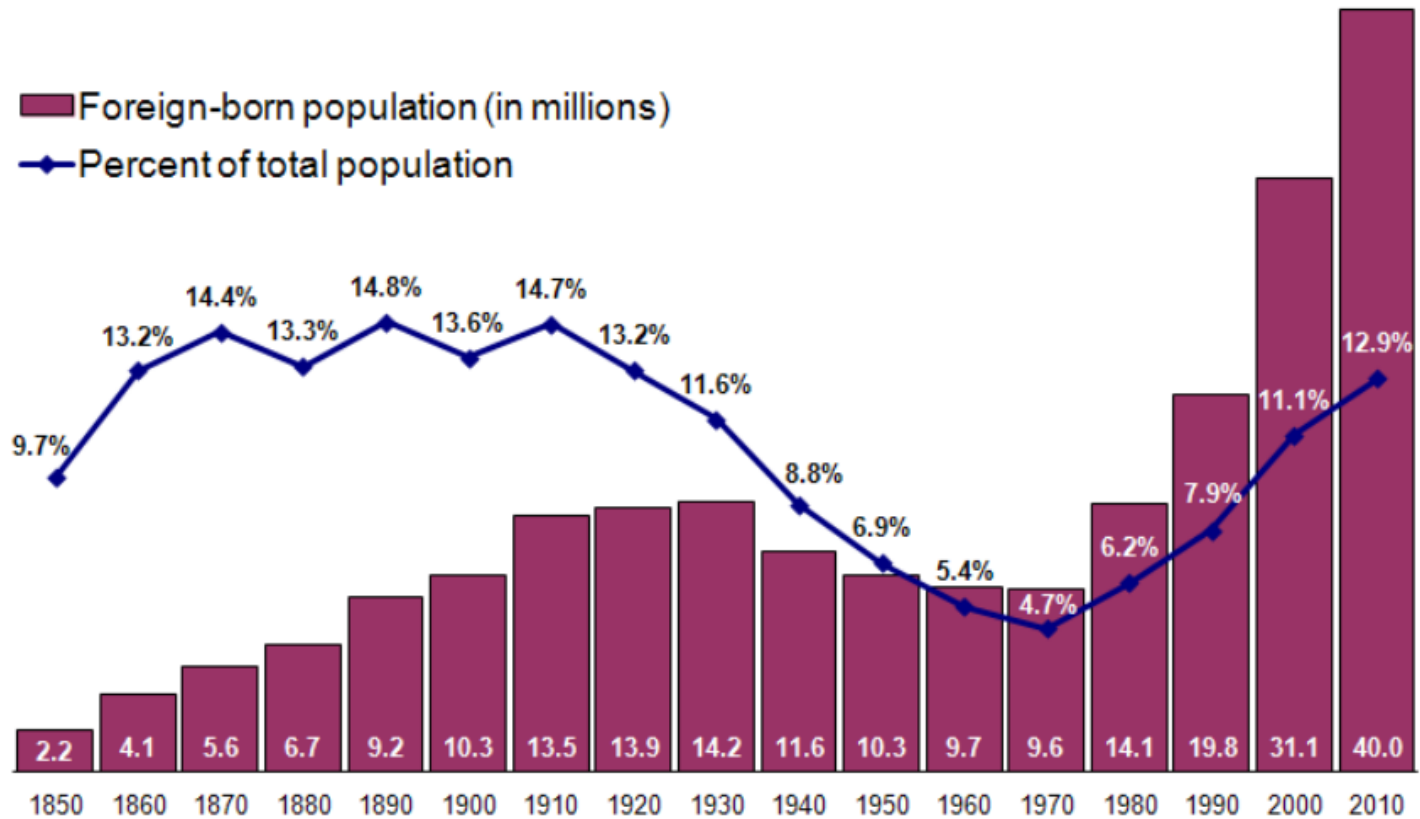


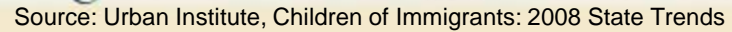
- Race
 - More diverse than any other generation
 - 43% of Millennial adult are non-white: the highest share of any generation*

Racial Diversity Growing



Foreign-Born Population and Percentage of Total Population, for the United States: 1850 to 2010



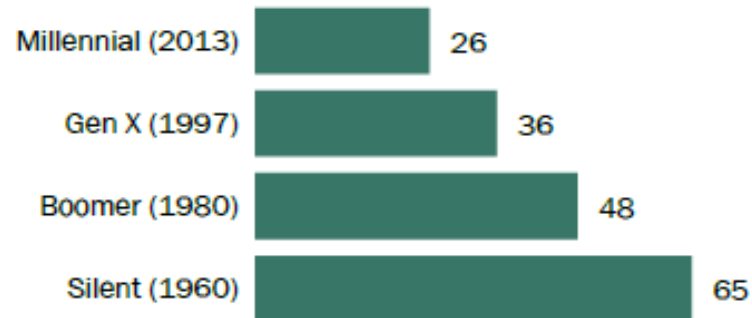


Life-stage Trends - Marriage



The Decline in Marriage Among the Young

% married at age 18 to 32, by generation



Source: Data from 1980, 1997 and 2013 are from the March Current Population Survey; 1960 data are from the 1960 Census

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Life-stage Trends – Birth Rates

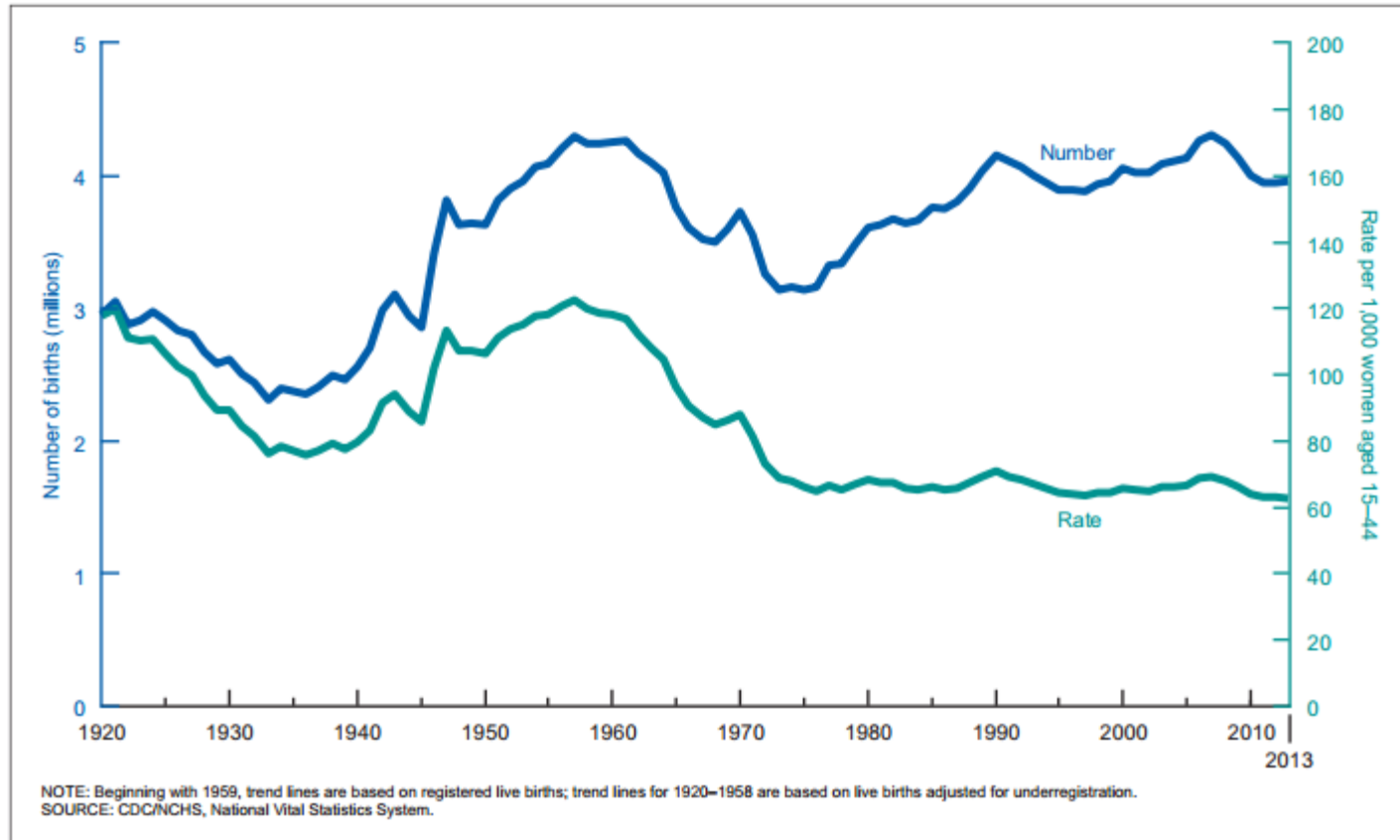
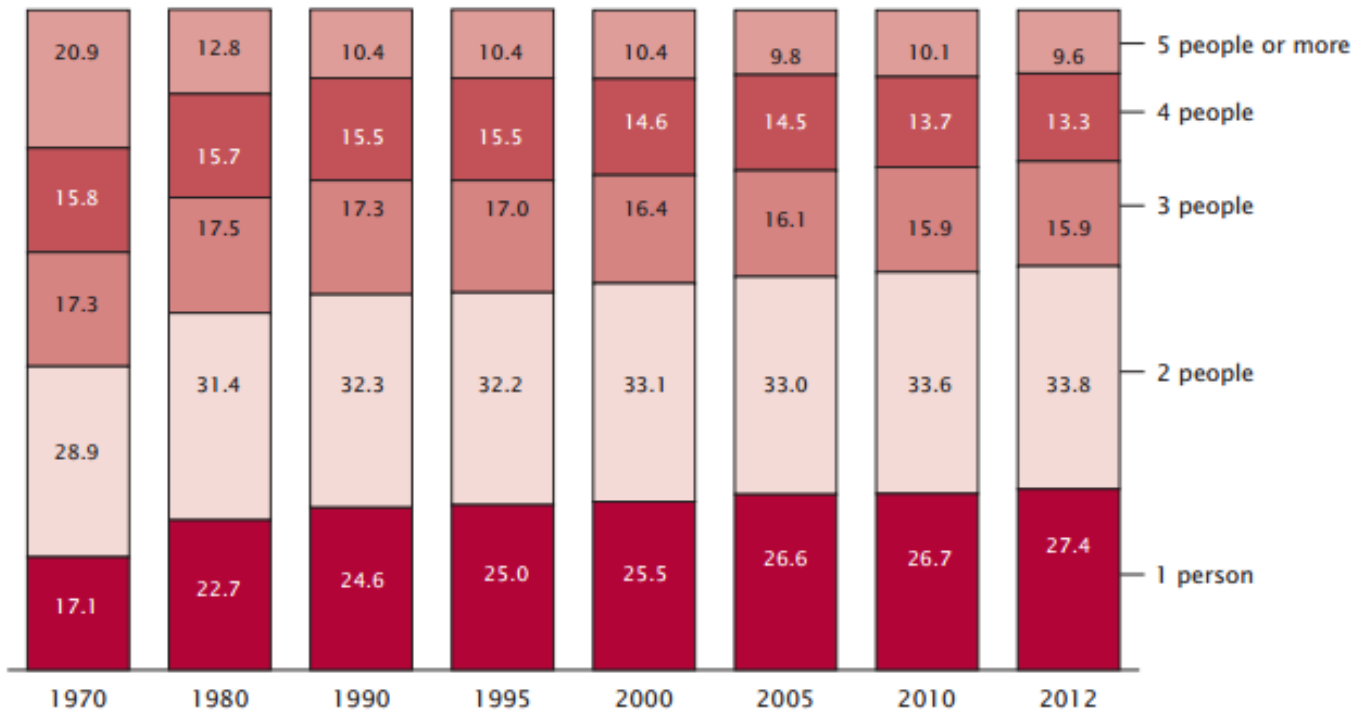


Figure 2. Live births and general fertility rates: United States, final 1920–2012 and preliminary 2013

Life Stage Trends - Family Size

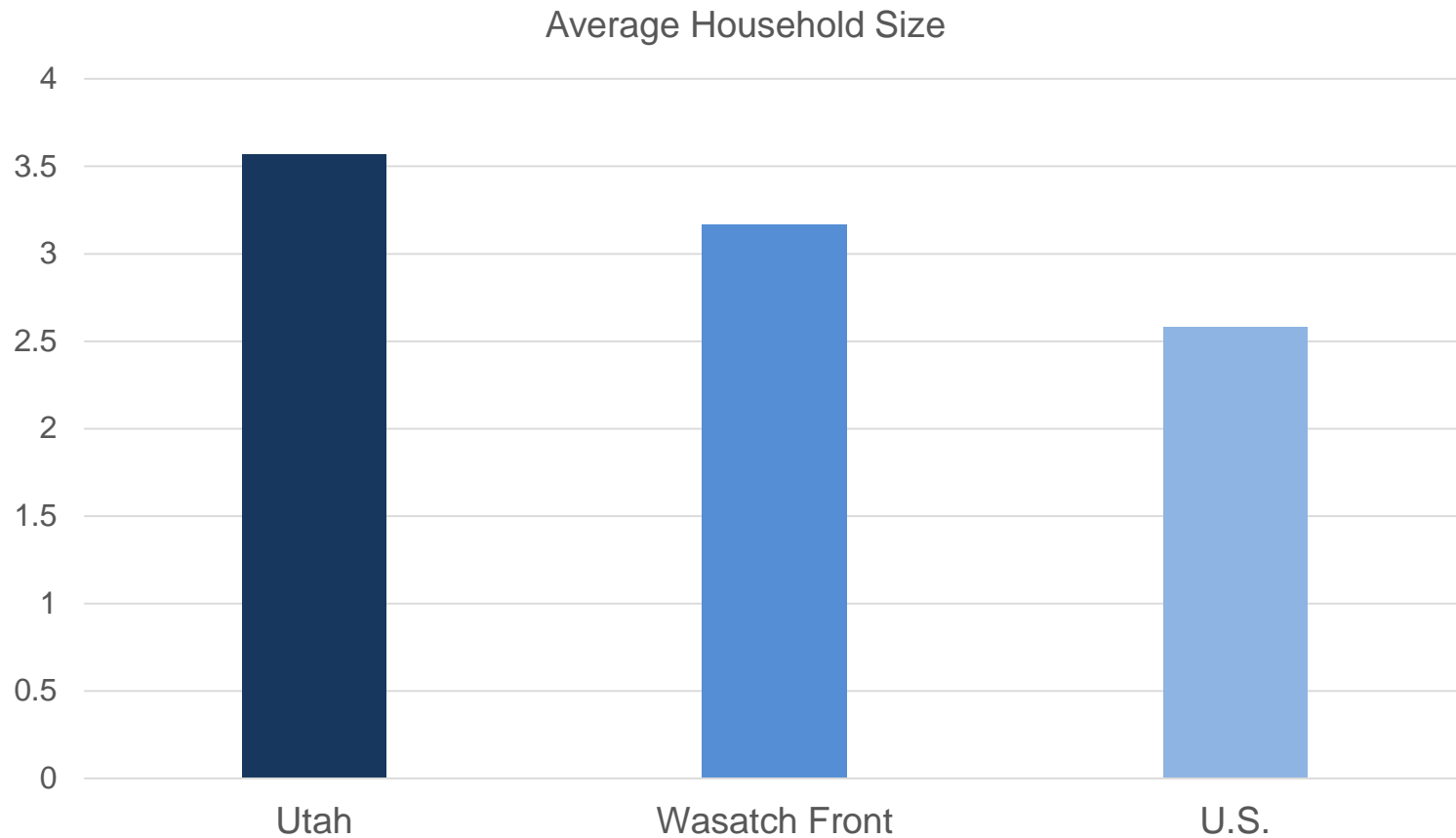


Figure 3.
Households by Size, 1970 to 2012: CPS
(In percent)



Source: U.S. Census Bureau, Current Population Survey, Annual Social and Economic Supplement, selected years, 1970 to 2012.

Along the Wasatch Front: Household Size

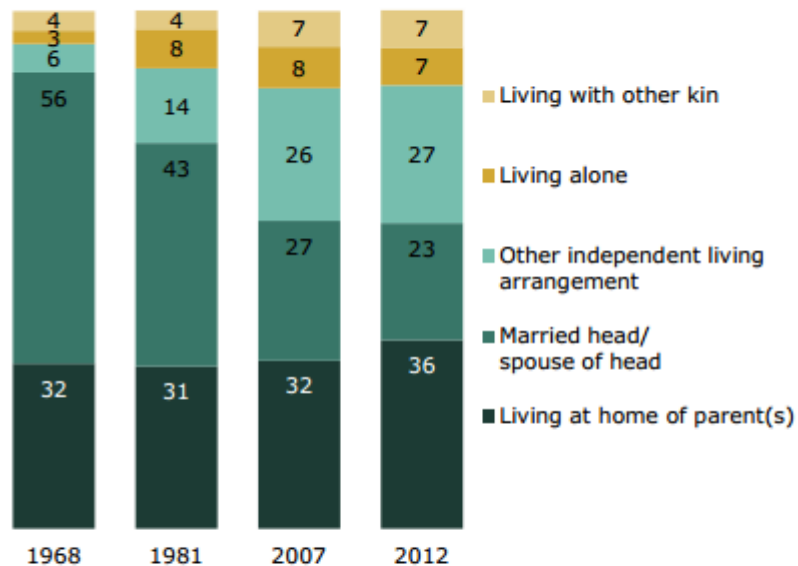


Life-stage Trends: Multi-generational Households



Living Arrangements of Young Adults, 1968-2012

% of adults ages 18 to 31 in each arrangement



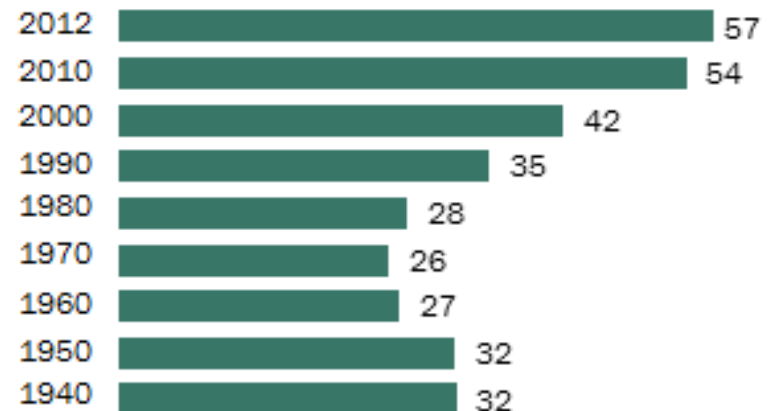
Notes: "Living at home of parent(s)" refers to an adult who is the child or stepchild of the head of the household, regardless of the adult's marital or cohabitation status. "Other independent living arrangement" includes adults living with unmarried partners or roommates or as a boarder (but who are not the child or stepchild of the head of the household). "Living with other kin" refers to adults who are the sibling, grandchild or other relative of the head of the household. Percentages may not total 100% due to rounding.

Source: Pew Research Center tabulations of March Current Population Survey (CPS) Integrated Public Use Micro Samples

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Population Living in Multi-generational Households Has Doubled Since 1980

In millions



Source: Pew Research Center analysis of U.S. Decennial Census data, 1940-2000, and 2006-12 revised weight American Community Surveys (IPUMS)

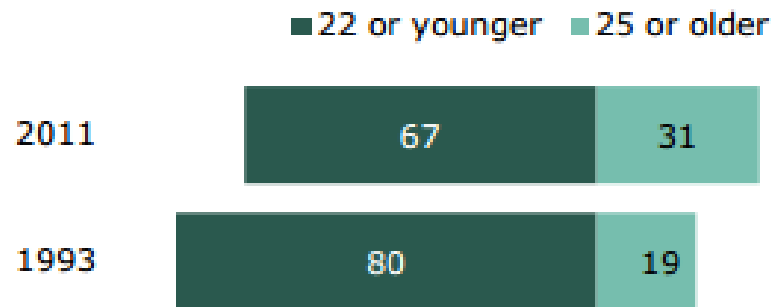
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Life-stage Trends: Multi-generational Households



When Does Adulthood Begin? Later than It Used To, Parents Say

% of parents saying children have to be financially independent by age ...



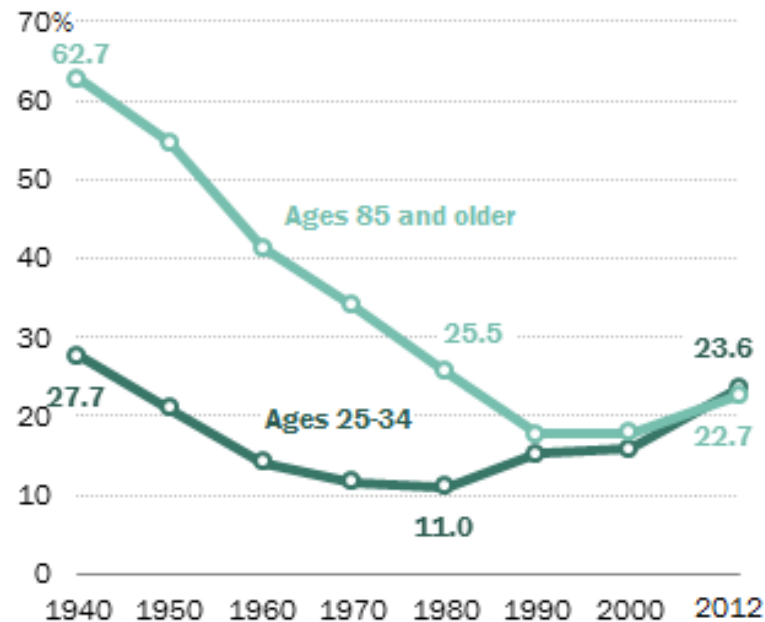
Notes: Based on parents with children age 16 or younger. For 2011, n=577. Data for 1993 are from a poll conducted by Newsweek/PSRA April 25-May 4, 1993. "Don't know/Refused" responses not shown.

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Life-stage Trends: Multi-generational Households



Young Adults Now More Likely Than Oldest Adults to Live in a Multi-generational Household

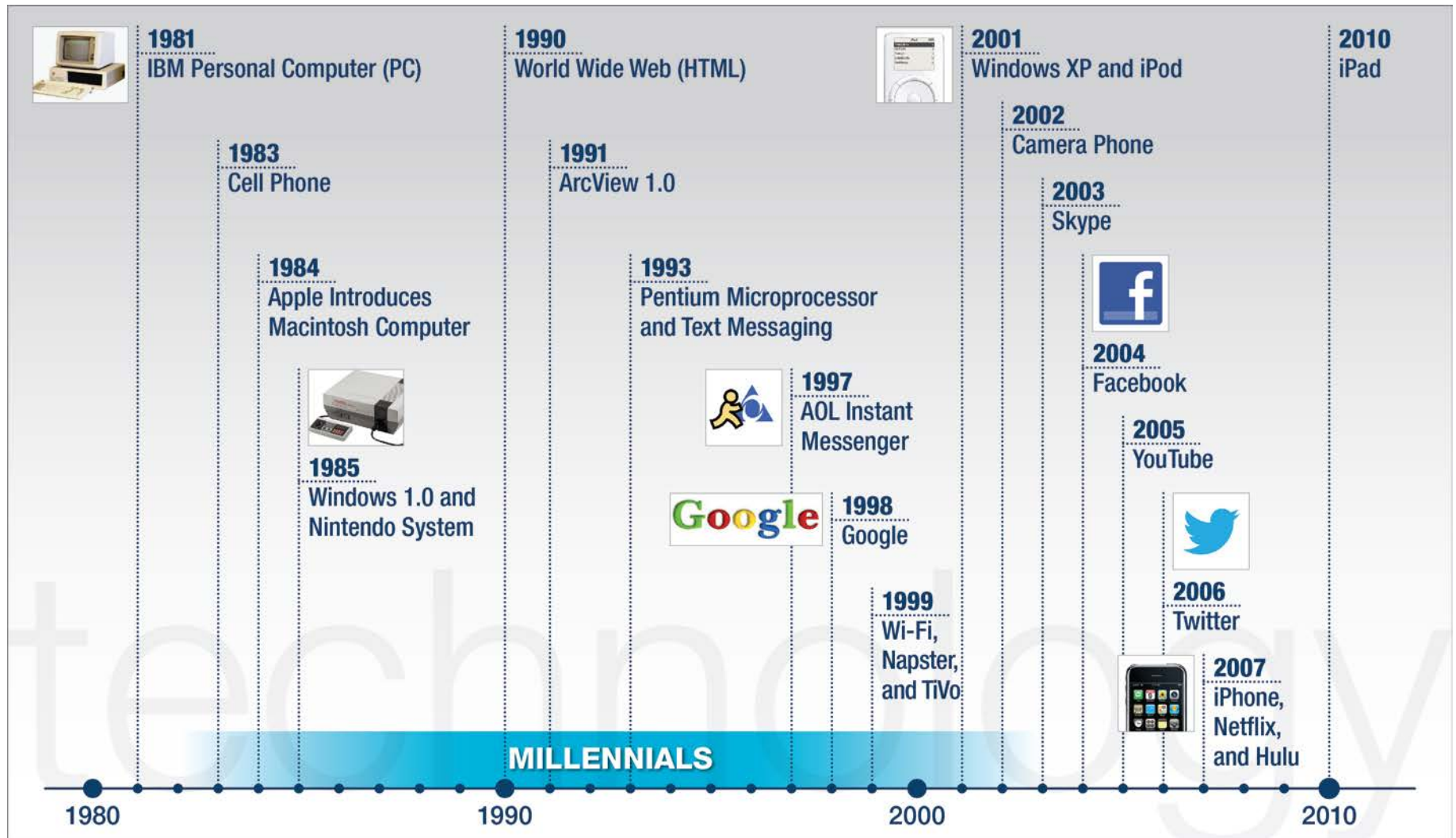


Note: Data labels shown are for 1940, 1980 and 2012.

Source: Pew Research Center analysis of U.S. Decennial Census data, 1940-2000, and 2012 American Community Survey (IPUMS)

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Technology & Millennials



Technology Use



WHERE MILLENNIALS USE SOCIAL MEDIA

Or where *don't* they use social media?



IN THE BATHROOM

2X

Young adults ages 18-24 are twice as likely (40%) to use social media in the bathroom compared to the average (21%).

Source: Nielsen U.S. Social Media Survey, 2013.

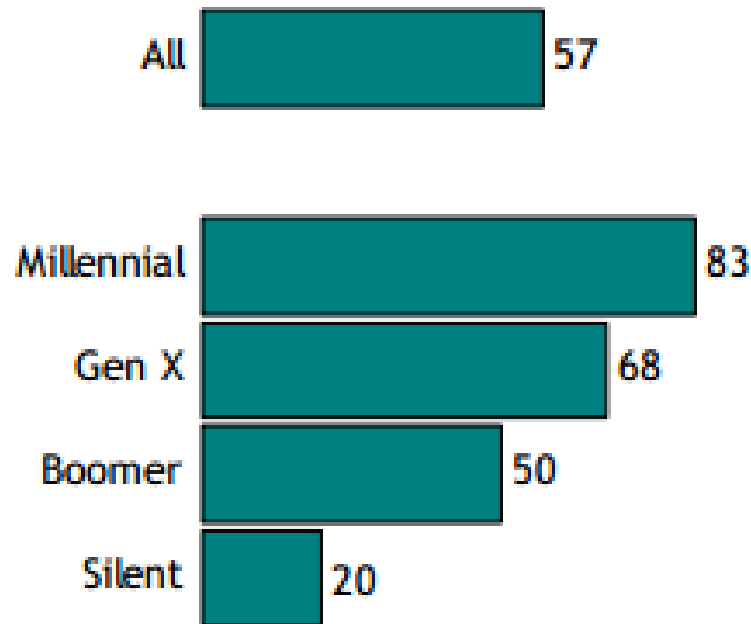
nielsen
.....

Technology Use



Do You Sleep with Your Cell Phone?

% who have ever placed their cell phone on or right next to their bed while sleeping



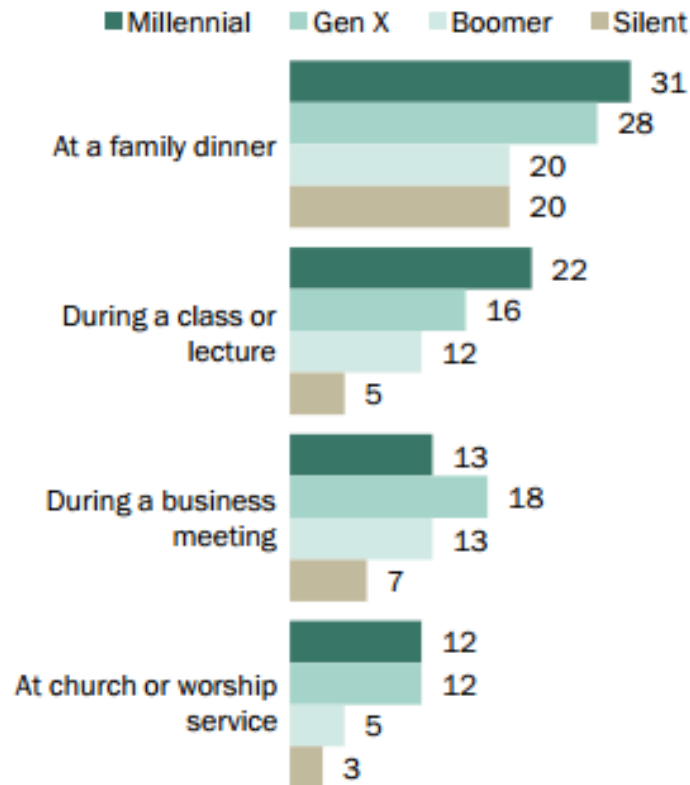
PewResearchCenter

Technology Use



When Is It Okay to Use a Cell Phone?

% saying it is okay to use a cell phone ... to send or receive messages or to go on the internet



Source: Pew Research survey, Feb. 14-23, 2014

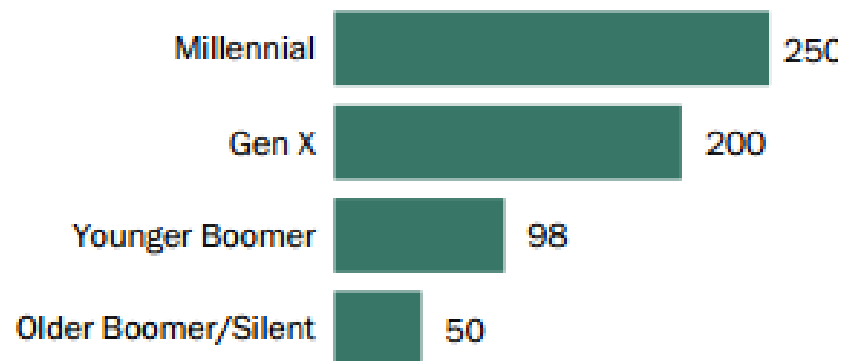
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Technology Use



Generations, Facebook and Friends

Median number of friends

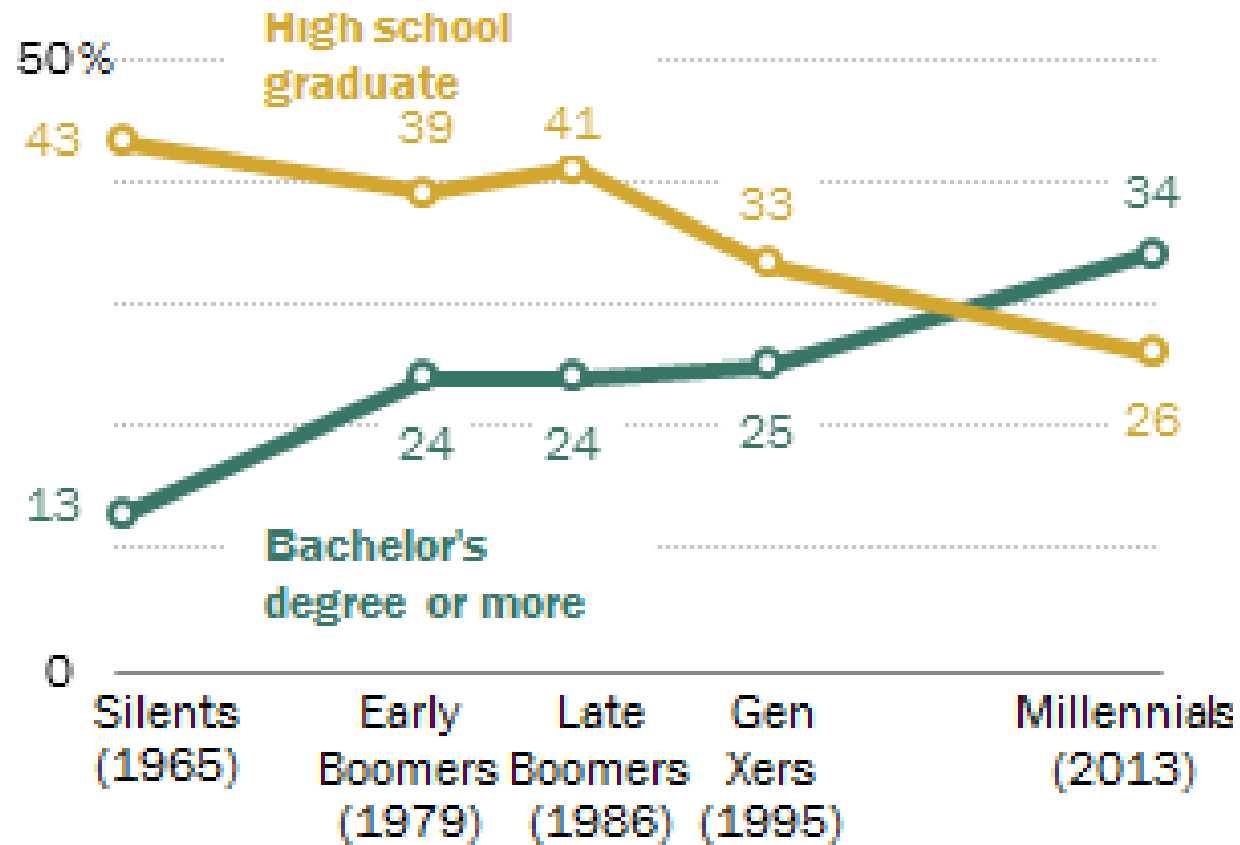


Note: Based on Facebook users, n=960. In 2013, "Younger Boomers" were ages 49 to 57, "Older Boomers" were ages 58 to 67 and "Silents" were ages 68 to 85.

Source: Pew Research Center's Internet Project survey, Aug. 7-Sep. 16, 2013

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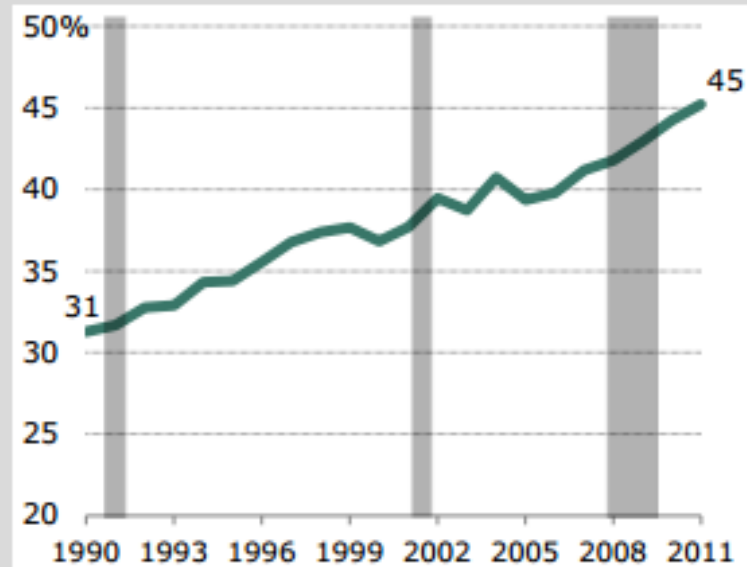
Educational Attainment



Educational Attainment



Share of Population of 18- to 24-Year-Olds Enrolled in School or College, 1990-2011



Note: Shaded areas represent economic downturns.

Source: Pew Research Center tabulations of Current Population Survey data.

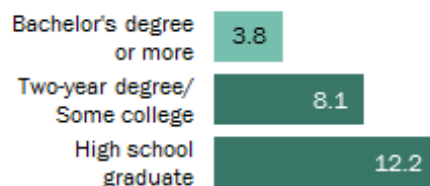
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Disparity among Millennials Ages 25-32 By Education Level in Terms of Annual Earnings ...

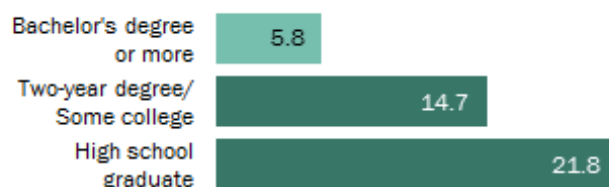
(median among full-time workers, in 2012 dollars)



Unemployment Rate ...



And Share Living in Poverty ...



Notes: Median annual earnings are based on earnings and work status during the calendar year prior to interview and limited to 25- to 32-year-olds who worked full time during the previous calendar year and reported positive earnings. "Full time" refers to those who usually worked at least 35 hours a week last year. The unemployment rate refers to the share of the labor force (those working or actively seeking work) who are not employed. Poverty is based on the respondent's family income in the calendar year preceding the survey.

Source: Pew Research Center tabulations of the 2013 March Current Population Survey (CPS) Integrated Public Use Micro Sample

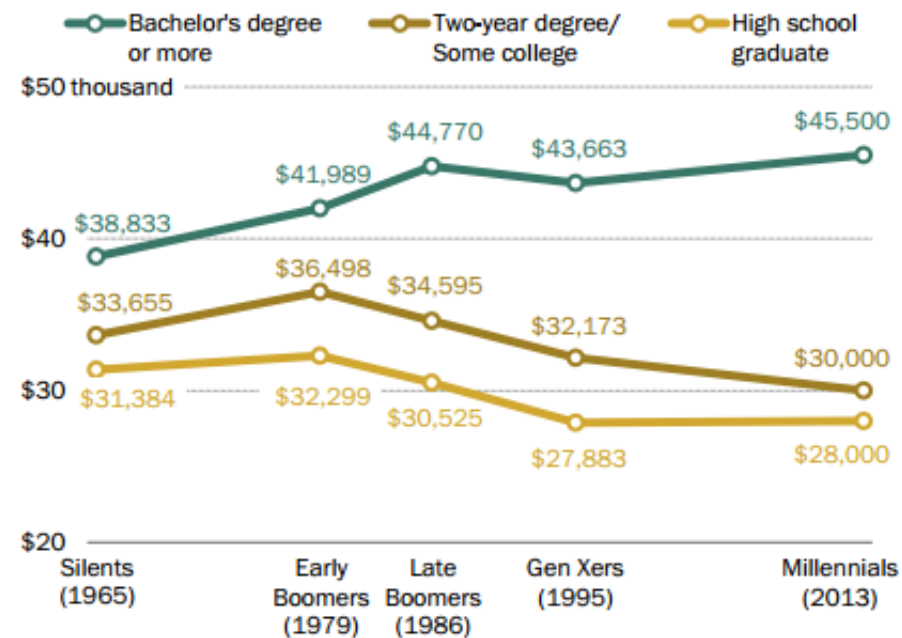
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Rising Earnings Disparity Between Young Adults with And Without a College Degree

Median annual earnings among full-time workers ages 25 to 32, in 2012 dollars



Notes: Median annual earnings are based on earnings and work status during the calendar year prior to interview and limited to 25- to 32-year-olds who worked full time during the previous calendar year and reported positive earnings. "Full time" refers to those who usually worked at least 35 hours a week last year.

Source: Pew Research Center tabulations of the 2013, 1995, 1986, 1979 and 1965 March Current Population Survey (CPS) Integrated Public Use Micro Samples

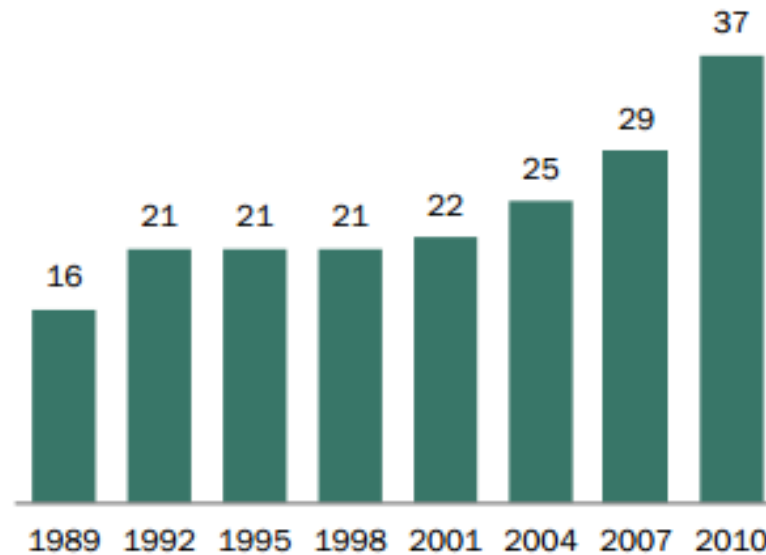
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Student Debt



Record Share of Young Households Owe Student Debt

%



Note: Young households are households with heads younger than 40. Student debtor households have outstanding student loan balances or student loans in deferment.

Source: Pew Research Center tabulations of the 1989 to 2010 Survey of Consumer Finances

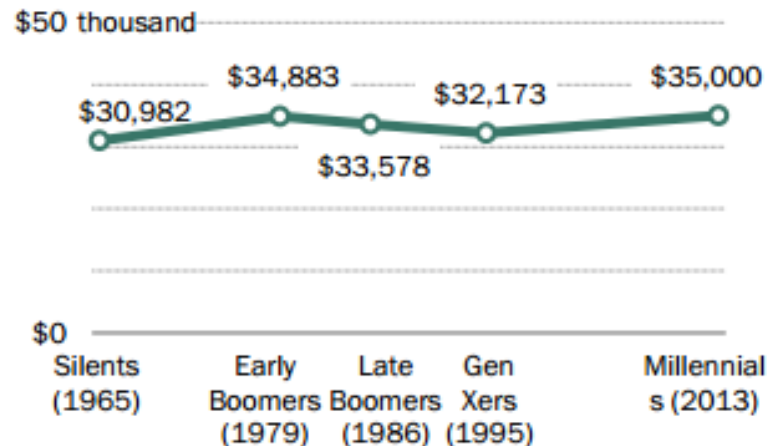
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Stagnant Wages



... Median Annual Earnings Have Remained Relatively Flat

(among full-time workers, in 2012 dollars)



Notes: The Census Bureau altered the educational attainment question in 1992. See Appendix B for details on comparability. Median annual earnings are based on earnings and work status during the calendar year prior to interview and limited to 25- to 32-year-olds who worked full time during the previous calendar year and reported positive earnings. "Full time" refers to those who usually worked at least 35 hours a week last year.

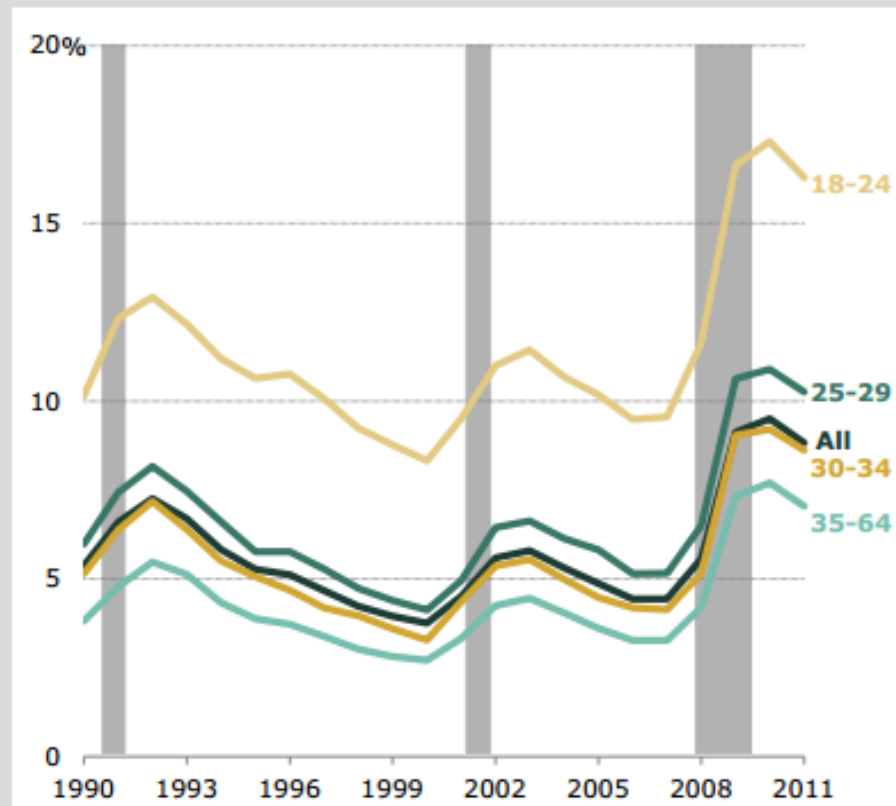
Source: Pew Research Center tabulations of the 2013, 1995, 1986, 1979 and 1965 March Current Population Survey (CPS) Integrated Public Use Micro Samples

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Employment, Unemployment, & Underemployment



Unemployment Rate, by Age, 1990-2011



Notes: Shaded areas represent economic downturns. "All" refers to ages 18 to 64.

Source: Tabulated by the Pew Research Center from data published by the U.S. Bureau of Labor Statistics.

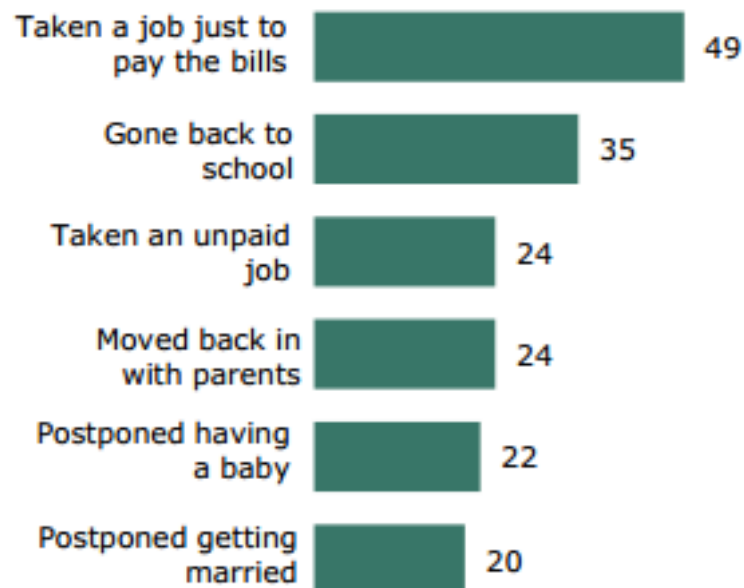
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Employment, Unemployment, & Underemployment



How Economic Conditions Have Affected Young Adults' Lives

% of 18- to 34-year-olds saying they have done each in recent years because of economic conditions



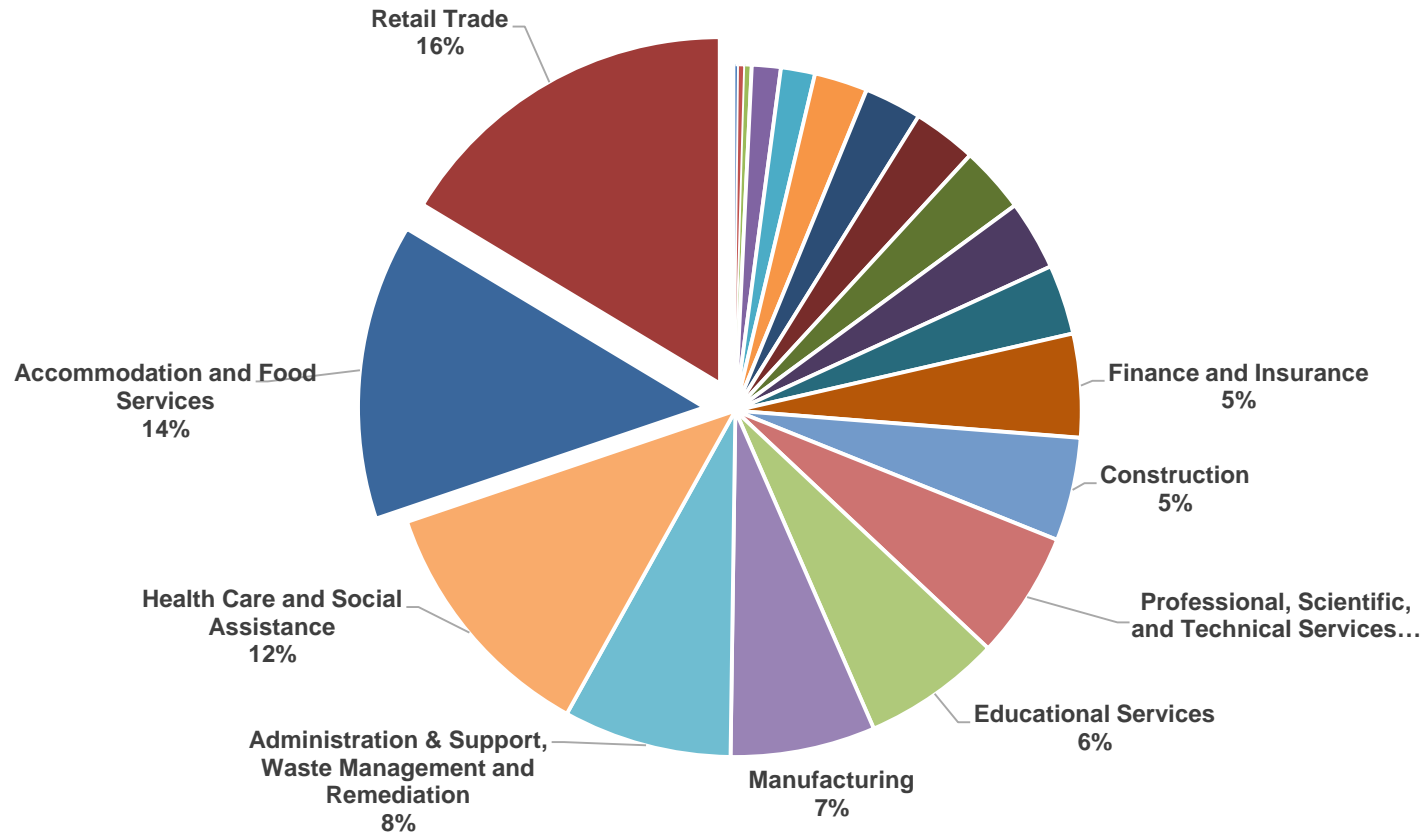
Note: Based on adults ages 18-34, n=808.

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Along the Wasatch Front: Millennial Employment by sector



Wasatch Front Employment by Sector for Workers Younger than 29 in 2011



Transportation Preferences

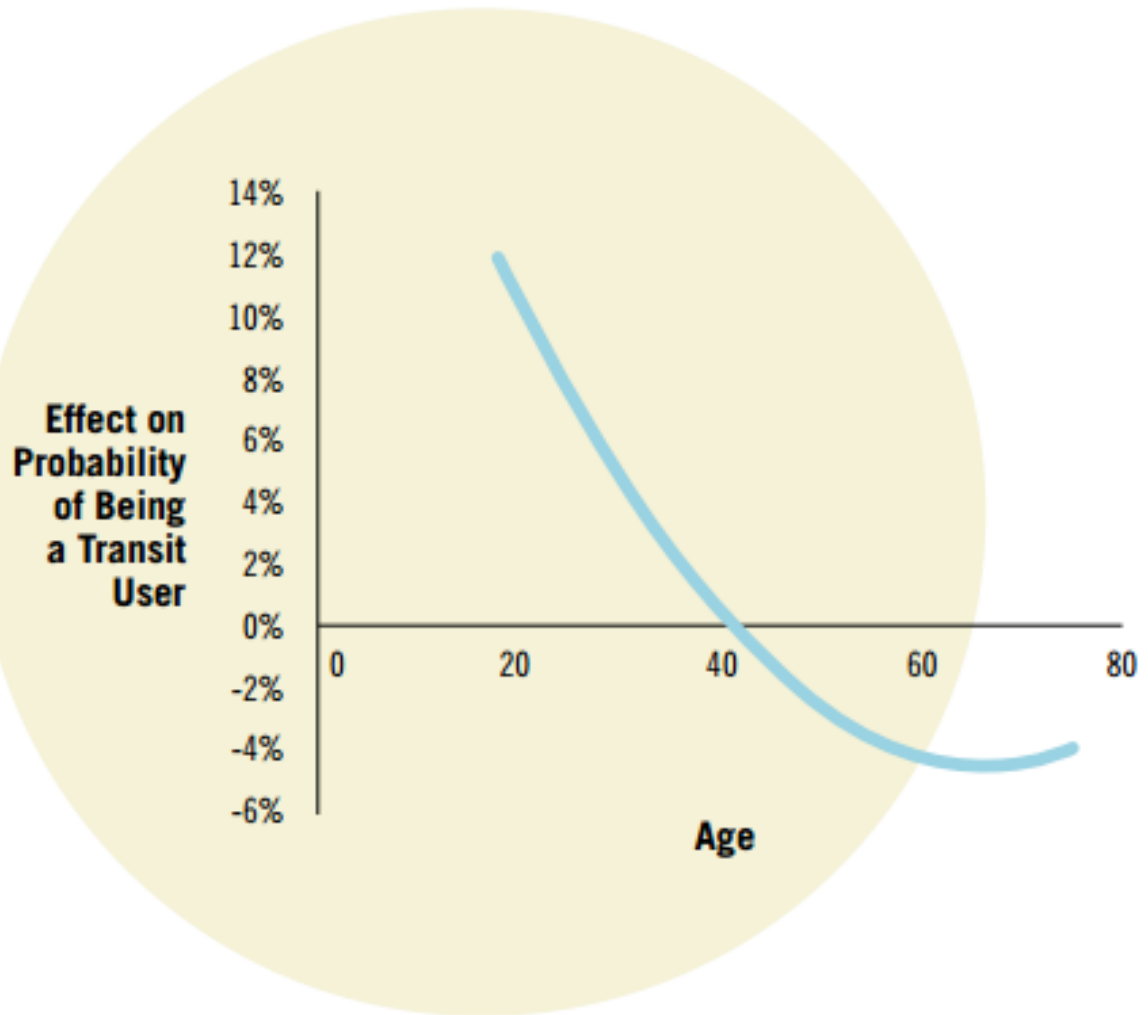


FIGURE 2:
AGE AND
TRANSIT USE

Millennials Top 5 reasons for choosing transit



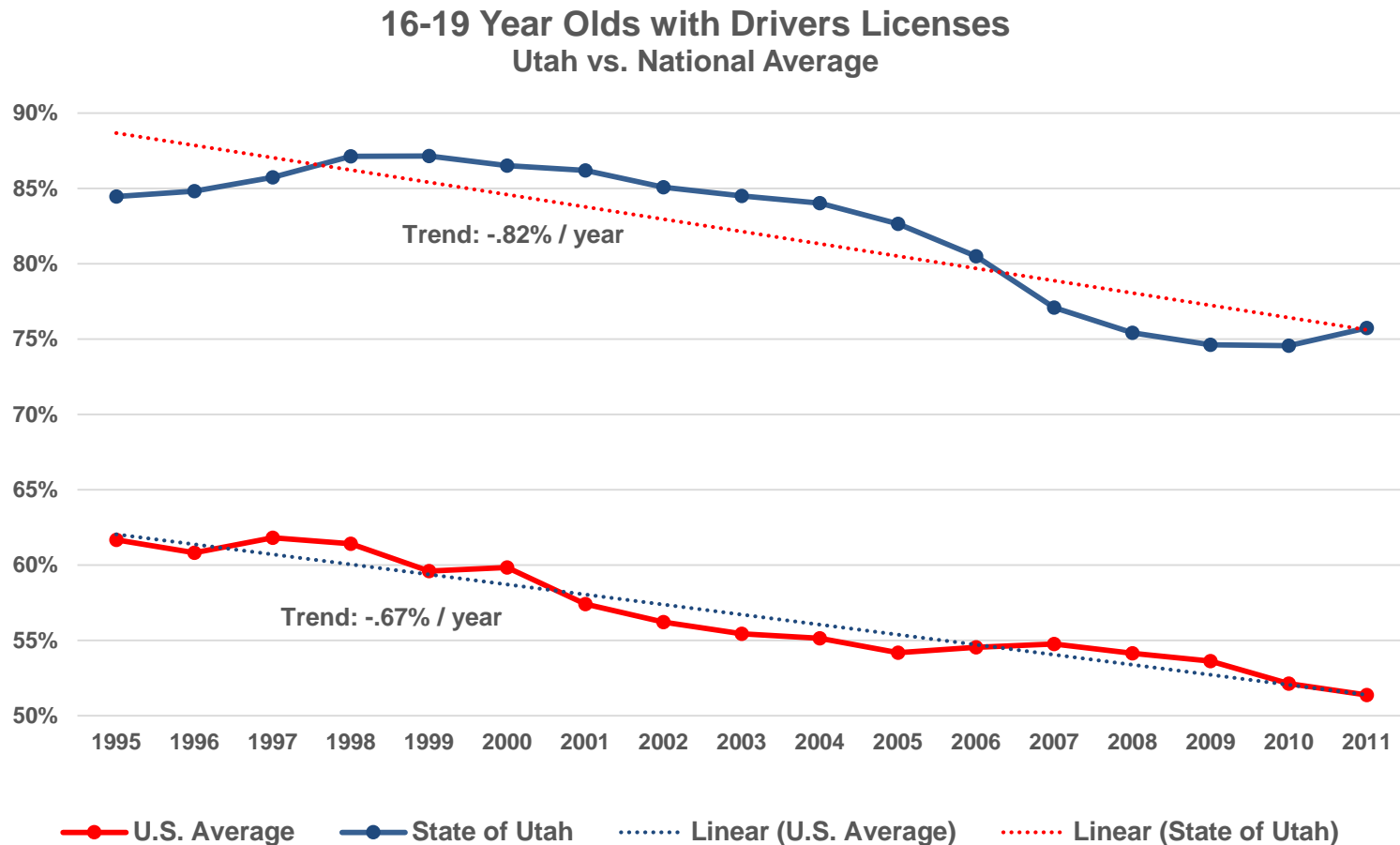
- Need to **save money** (46%)
- **Convenience** (46%)
- **Exercise** (44%)
- It just **makes more sense** in the community I live in (35%)

Key advantages of transit



- **Pay-per-use** (58%)
- Protecting the **environment** (50%)
- The ability to **socialize** online (44%)
- Creating **community** (44%)

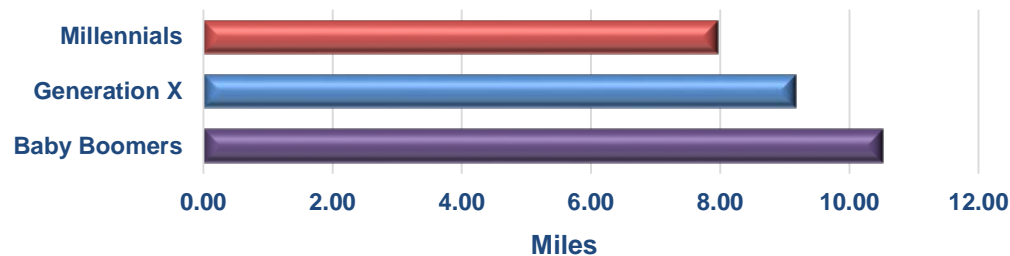
Along the Wasatch Front: Millennials with driver's licenses



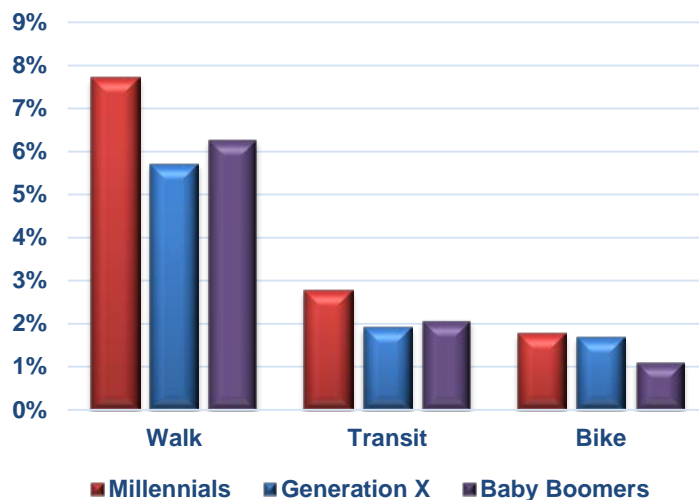
Along the Wasatch Front: Mode & distance comparison



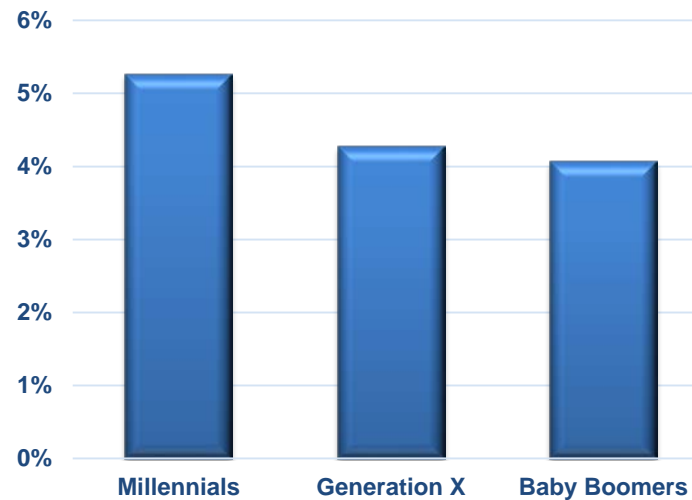
Average Trip Distance (Miles)



Percentage of Trips by Mode



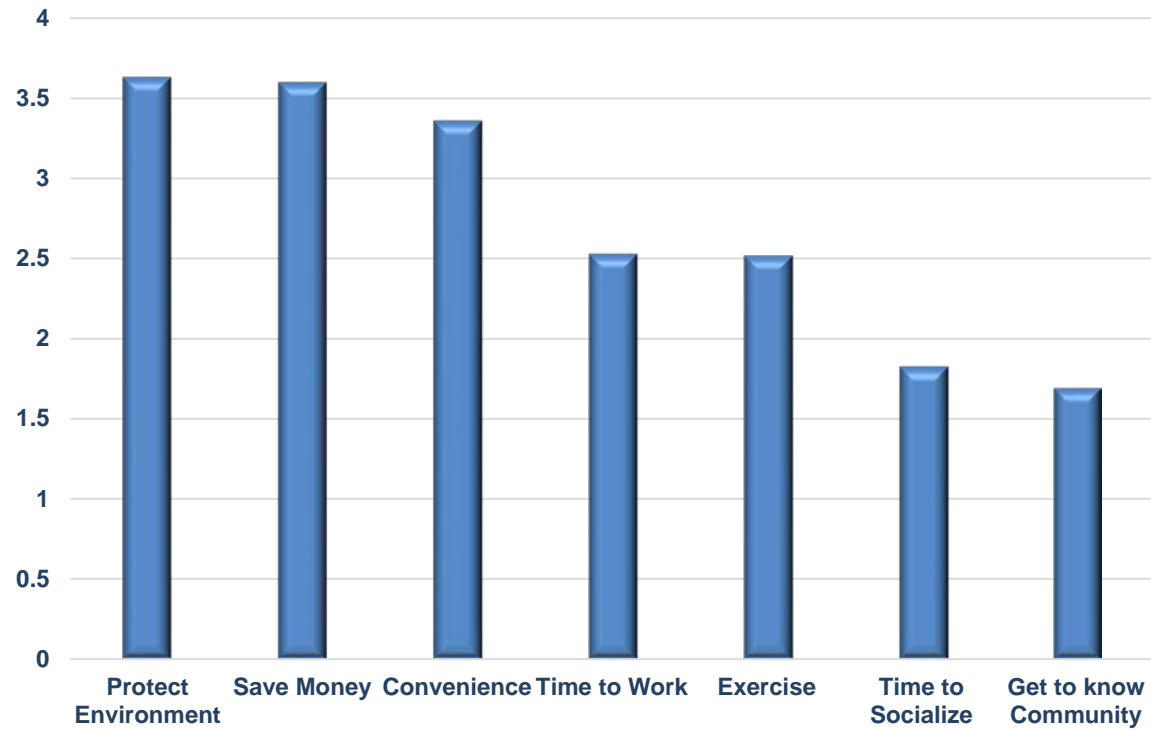
Percentage of HBW Trips on Transit



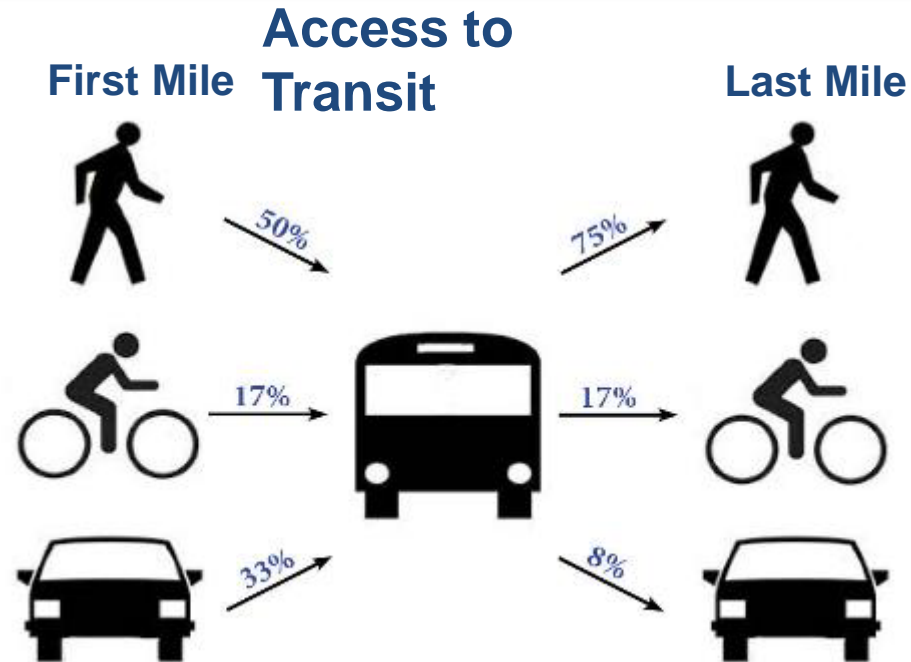
UTA Millennial Survey



Why Millennials Ride Transit
(Ranked on a scale of 5)



UTA Millennial Survey: Ridership frequency & access



Ridership Frequency

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
57.4% Ride 3+ days per week						
37.9% Ride 5+ days per week						

Importance of First- and- Last Mile Solutions



Bikeshare

- Bikeshare users are predominantly **young, male, Caucasian, highly educated, and less affluent***

GREENbike SLC Bikeshare**



- **96% AGREE** that Bike Share is an **enhancement to mass transit** in Utah.
- **52%** said they **drive a personal vehicle less often** than before the GREENbike program launched.
- **30% use mass transit more often** as a direct result of GREENbike.

*Source: 2013 Capital Bikeshare Member Survey Report

**Source: GREENbike SLC Bikeshare Annual Member Survey

First- and- Last Mile Solutions



Enterprise Carshare

- **Forty percent** of Salt Lake City Enterprise Carshare members were born in **1982 or later***



Land Use + Transportation



Location Decision Factors

Which of the following are MOST important to you when deciding where to live? Please select all that apply.

Percentage of priority	Nat	Mil	AB
Economic factors, such as jobs and business growth	54%	64%	42%
Living expenses, such as housing and transportation costs	79%	83%	80%
Metro features, such as schools, transit, and safe streets	44%	57%	32%
Health and nature*	53%	52%	59%
Kinds of people, such as diversity and mix of ages	43%	45%	44%
Community engagement	22%	25%	20%

* e.g., parks, trails, hospitals and healthy food options

Housing Preferences



Decline of the Traditional Suburb

Where do you live now and where do you want to live someday if you can afford it?

**A suburb where most people
drive to most places**

	Nat	Mil	AB
Now	40%	41%	39%
Someday	7%	8%	7%
Change	-33%	-33%	-32%

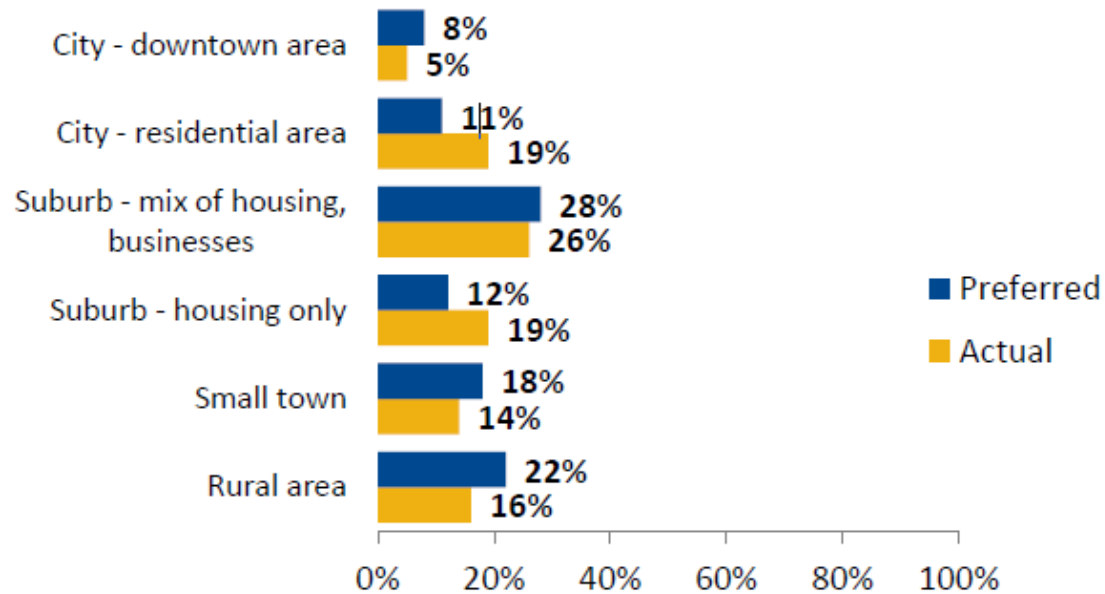
**A suburb with
walkable amenities**

	Nat	Mil	AB
Now	18%	19%	14%
Someday	21%	25%	19%
Change	+3%	+6%	+5%

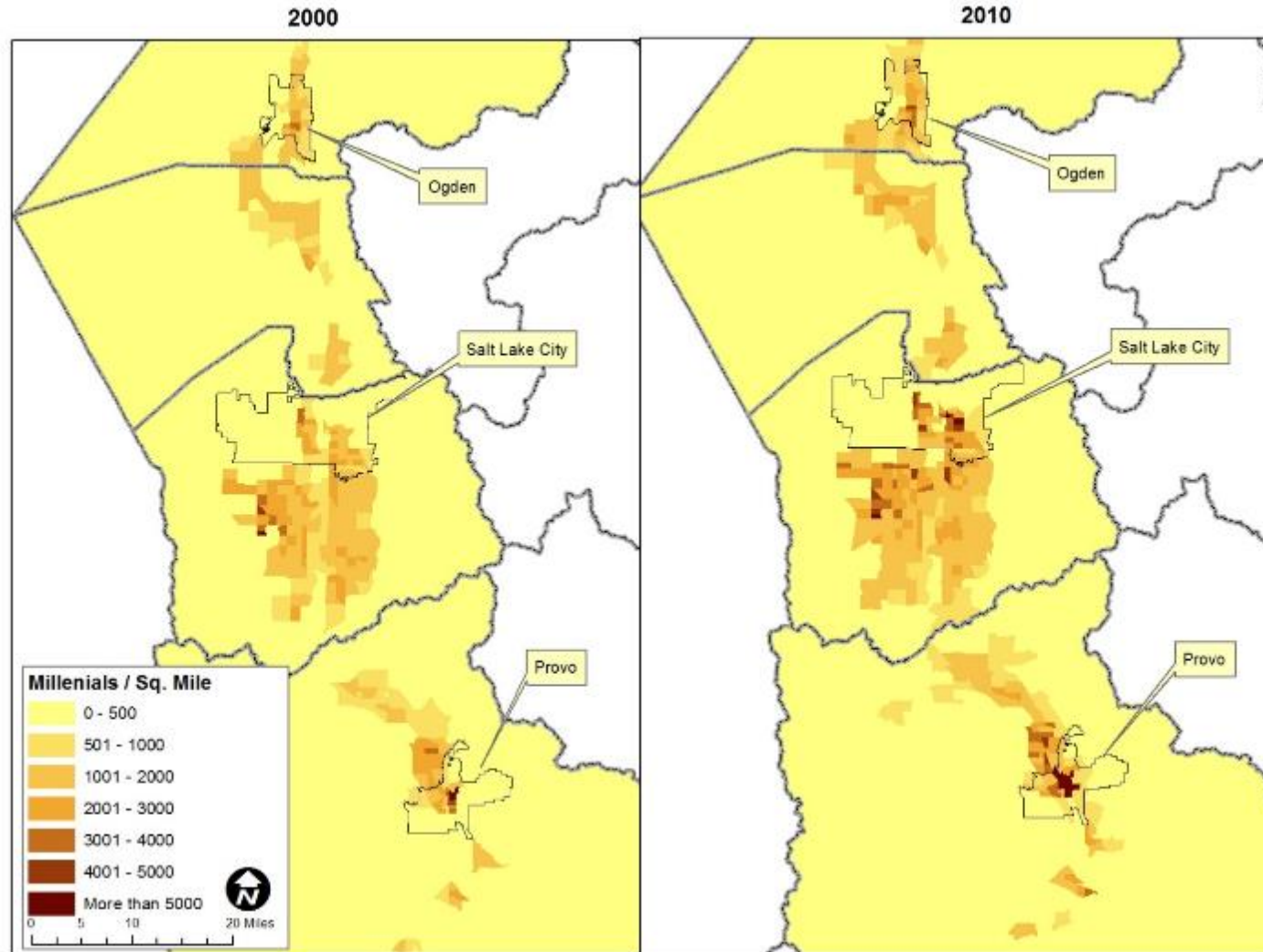
Housing Preferences



Preferred versus Actual Community Type



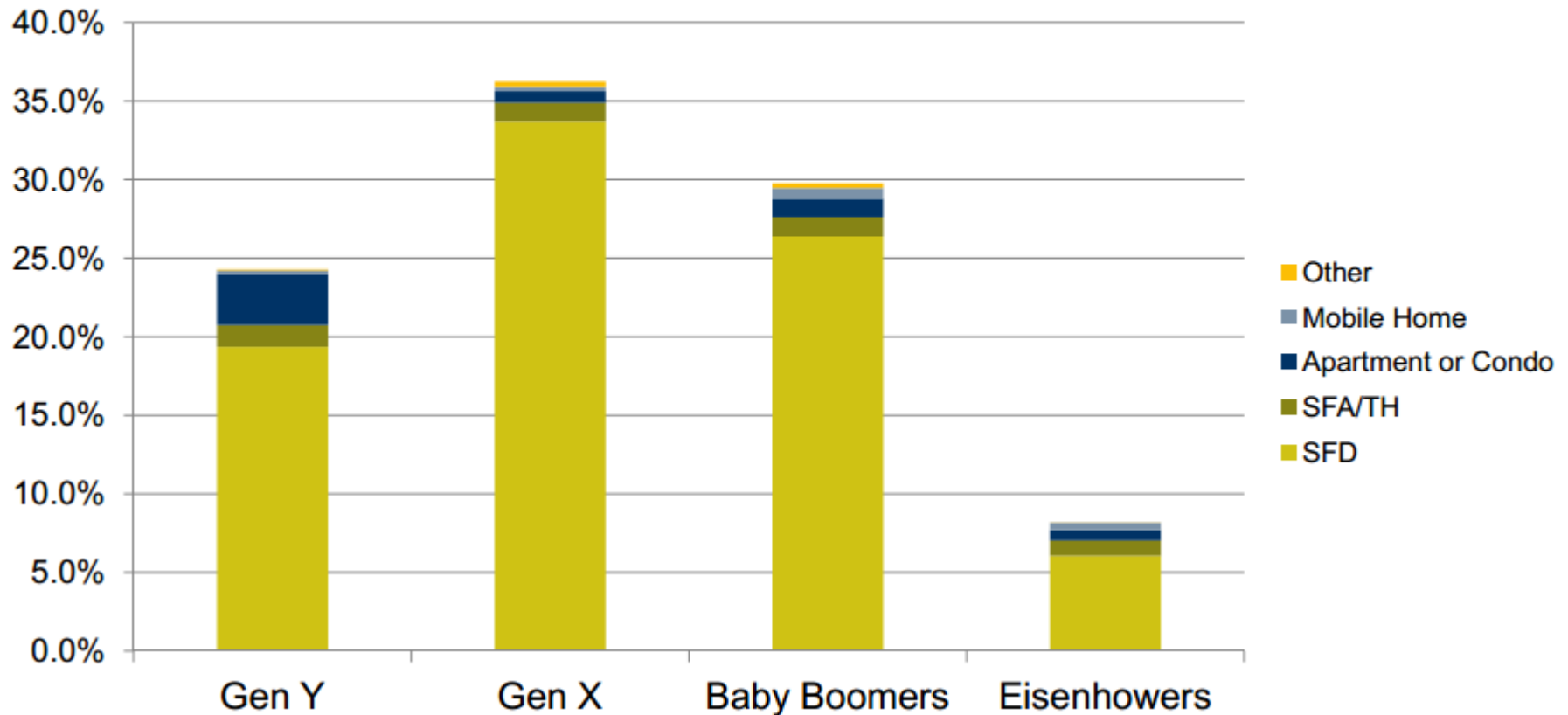
Along the Wasatch Front: Millennial population Density



Housing Preferences



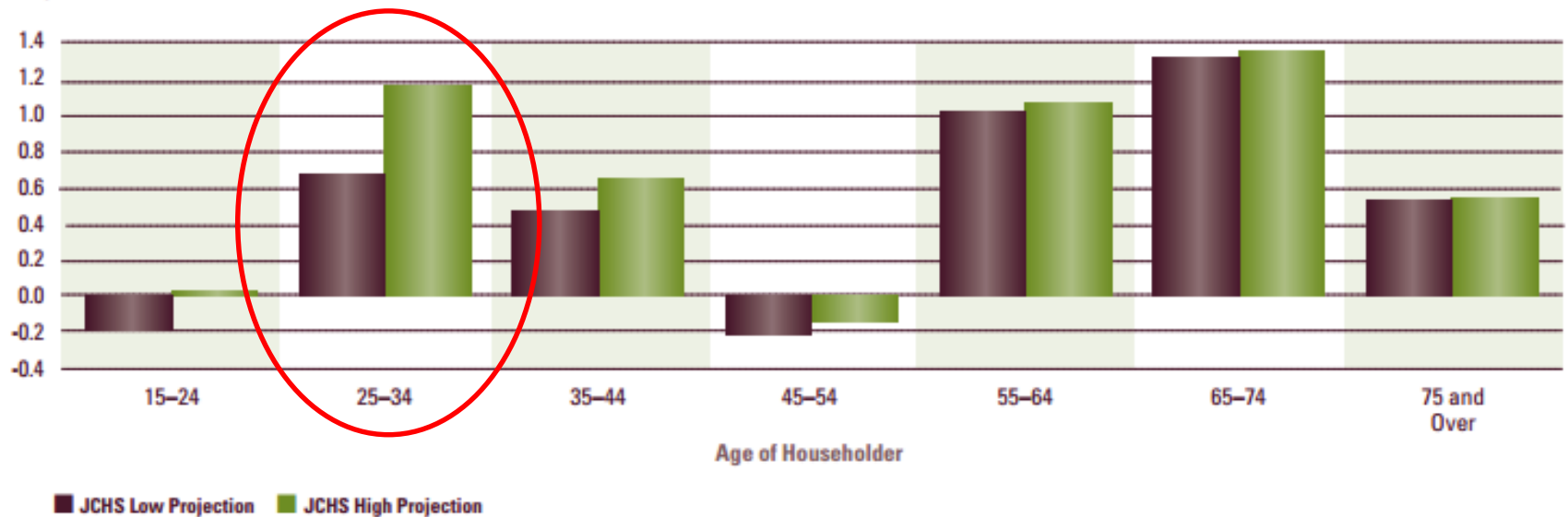
DISTRIBUTION OF PREFERRED PRODUCT TYPES BY GENERATION



Housing Preferences



Projected Renter Household Growth, 2010–20 (Millions)



“Do-Gooders” but Distrustful

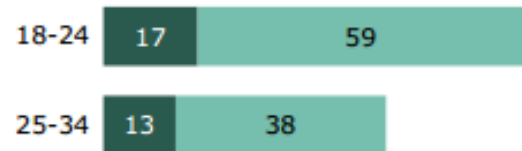


Young and Ambitious

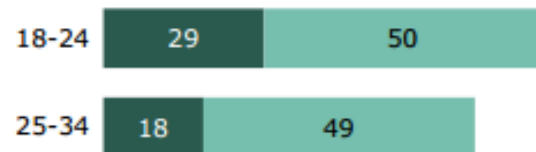
% saying each is one of the most important or a very important thing in their life

- One of the most important things
- Very important, but not the most

Being successful in a high-paying career or profession ...



Having a job or career that benefits society ...

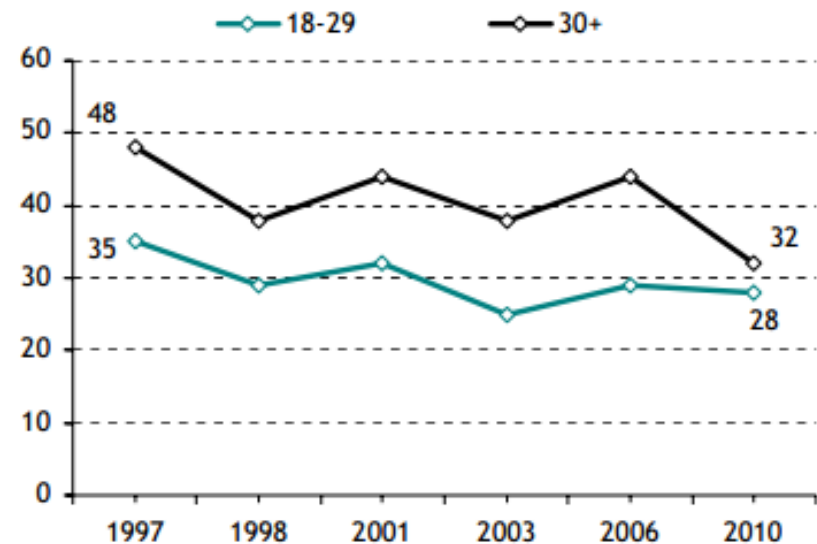


Note: Based on adults ages 18-34. Items were asked of half the sample. For first item, n=384; for second, n=424.

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Measuring Social Trust

% who say most people can be trusted



Source: Data from 1997 through 2006 are from surveys conducted by the Pew Research Center for the People & the Press.

PewResearchCenter

What does this MEAN for Urban Planners?



Demographics and Historical Trends: how we make planning decisions



33% of the
Utah
population is
aged 15-32



Are We All Bearded Millennials ?



How do we approach planning to reach this Generation?



Key Factors:



- Transportation



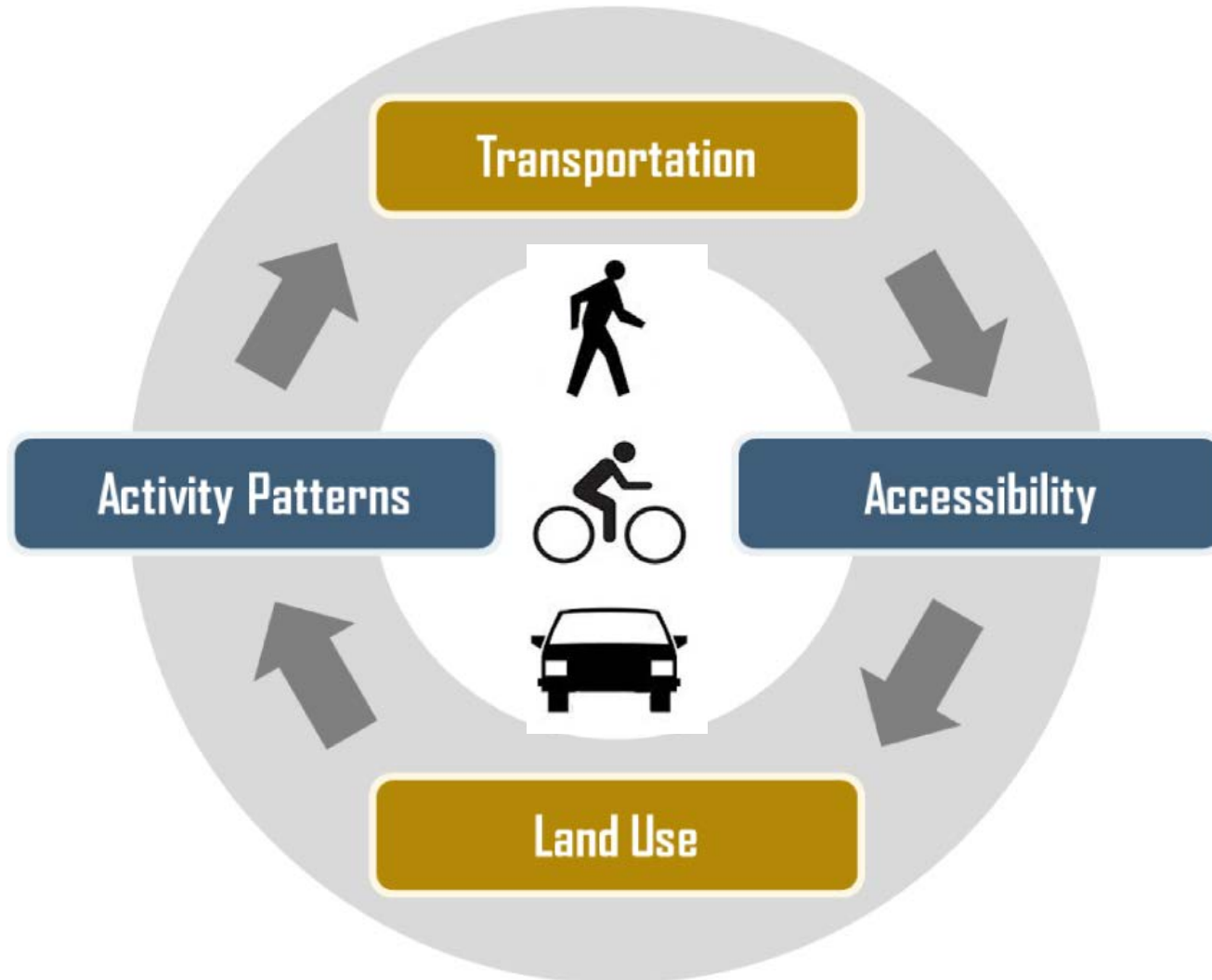
- Land Use



- Public Involvement



Integrate Land Use and Transportation Planning



A photograph of a group of cyclists riding on a paved street lined with trees. In the foreground, a man in a light blue shirt and khaki pants is riding a white bicycle. To his right, a woman in a dark t-shirt is riding a bicycle with a child in a green seat. The pavement has a white painted symbol of a bicycle with a double chevron above it. Other cyclists and parked cars are visible in the background.

Opportunity is Now

- Build infrastructure to support all modes
- Reinforce travel behavior and establish travel patterns

Why Age is King with Transit

– *More time to text!*



Where We Want to Live



Millennials in walkable neighborhoods is up by 26% in the last decade

Wishing for Walkable Communities



- Walkable development
 - Mix of housing types
 - Sidewalks
 - Public Transportation Options
 - Stores & Restaurants
 - Active & Passive Open Space
- All the HOT places in our region!!!

Preferred
combination
of 75% of
Utahns

NEW Housing Market Realities



- Sub-prime mortgages are history
- FHA-like conventional mortgages are king
- “Jumbo” loans expensive and difficult
- Demand for \$1 million+ homes tanked
- Realization that location matters for investment
- **MEANING**
- **Smaller homes**
- **Smaller lots**
- **More renters**
- **Trend to safe location investments**



Changing Face of Affordable Housing



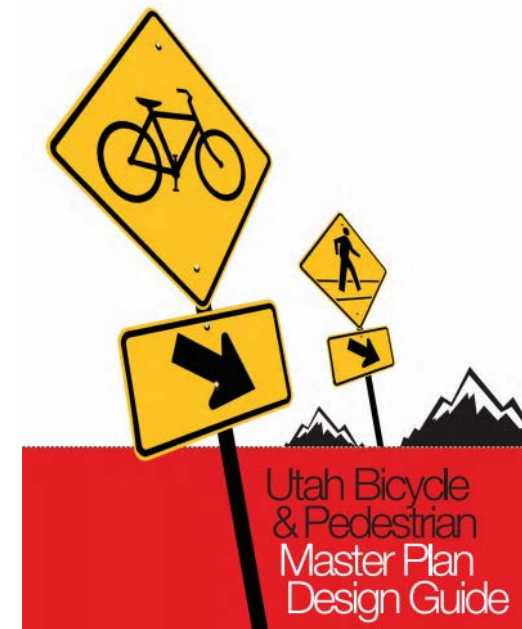
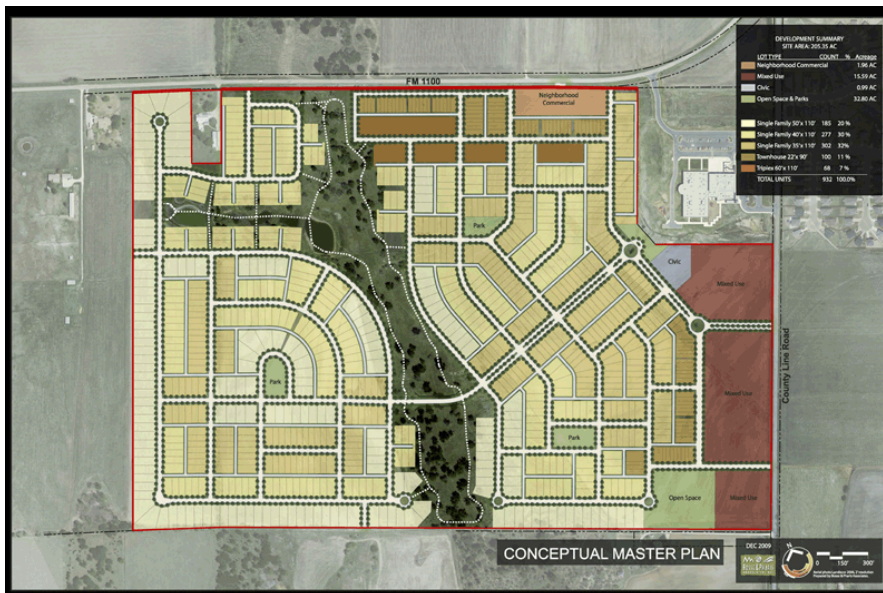
Renting Millennials



Consider demographic changes



Create a vision and master plan document to reflect, anticipate and plans for these changes



Impacts of Current Choices



- Ask your community be thoughtful about land use and the trade-offs
- **Example: Dense, urban environment has better tax yield, transit ridership potential and environmental impact—when communities say no to dense development, they are saying yes to higher taxes and more automobiles on the road**

Priority of Spending Our Money



- Education
- Lifestyle
- Technology
- Experience over material



How We Shop



Shoes for good



Digital Natives



The answer is only a Google search away...

“Do-Gooders”



Public Engagement Opportunities

- Engaged in Environmental issues
- Care about Community
- Want their lives to “make a difference”



Place based Engagement



- Traditional ‘open houses’ may not work
 - Millennials expect to be able to participate on their terms

“Take engagement opportunities to the people and [do] not rely as much on the people coming to us.” **Nole Walkingshaw**, Manager of Institutional Engagement at Salt Lake City



Use both traditional and new engagement techniques:



- Open Houses at the site of development opportunities
- Tables and booths at festivals, farmers markets, summer community events
- Posters with QR codes or shortened URL's
- Textizen, text your city planner
- Open City Hall/User Voice online public engagement on topics
- Online Surveys

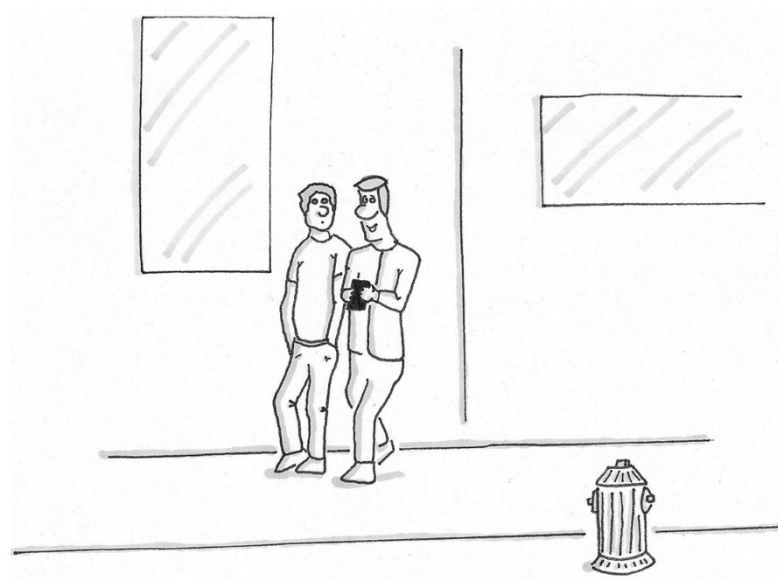


Ask a Millennial About Millennials



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"And this app shows what's right in front of me."