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

*Source: American Public Transit Association Millennials and Mobility Survey

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


Source: US Census Bureau
Millennial Populations

Millennial % of Population by State

Source: http://www.governing.com/
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*

* Source: Pew Research 6 New Findings About Millennials
Racial Diversity Growing

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

Immigration & Racial Diversity

Share of 5-17 with Immigrant Parents: 2007-08

Source: Urban Institute, Children of Immigrants: 2008 State Trends

Image Source: Pam Perlich, Utah’s Demographic Transformation Data Slides from RCDE Presentation
Life-stage Trends - Marriage

The Decline in Marriage Among the Young

% married at age 18 to 32, by generation

- Millennial (2013): 26%
- Gen X (1997): 36%
- Boomer (1980): 48%
- Silent (1960): 65%

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

PEW RESEARCH CENTER
Life-stage Trends – Birth Rates

Life Stage Trends - Family Size

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

Along the Wasatch Front: Household Size

Average Household Size

- Utah: 3.5
- Wasatch Front: 3.0
- U.S.: 2.5

Source: 2008-2012 American Community Survey 5-Year Estimates
Life-stage Trends: Multi-generational Households

Living Arrangements of Young Adults, 1968-2012

% of adults ages 18 to 31 in each arrangement

<table>
<thead>
<tr>
<th>Year</th>
<th>Married head/spouse of head</th>
<th>Living at home of parent(s)</th>
<th>Other independent living arrangement</th>
<th>Living alone</th>
<th>Living with other kin</th>
</tr>
</thead>
<tbody>
<tr>
<td>1968</td>
<td>32</td>
<td>31</td>
<td>32</td>
<td>27</td>
<td>7</td>
</tr>
<tr>
<td>1981</td>
<td>31</td>
<td>31</td>
<td>32</td>
<td>27</td>
<td>7</td>
</tr>
<tr>
<td>2007</td>
<td>27</td>
<td>27</td>
<td>27</td>
<td>23</td>
<td>7</td>
</tr>
<tr>
<td>2012</td>
<td>23</td>
<td>23</td>
<td>23</td>
<td>27</td>
<td>7</td>
</tr>
</tbody>
</table>

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.


Population Living in Multi-generational Households Has Doubled Since 1980

In millions

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>57</td>
<td>54</td>
<td>42</td>
<td>35</td>
<td>28</td>
<td>26</td>
<td>27</td>
<td>32</td>
<td>32</td>
</tr>
</tbody>
</table>

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

PEW RESEARCH CENTER

Source: Pew Research Center
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 ...

<table>
<thead>
<tr>
<th>Year</th>
<th>22 or younger</th>
<th>25 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>67</td>
<td>31</td>
</tr>
<tr>
<td>1993</td>
<td>80</td>
<td>19</td>
</tr>
</tbody>
</table>

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.

PEW RESEARCH CENTER Q28

Source: Pew Research Center
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

- **1981**: IBM Personal Computer (PC)
- **1983**: Cell Phone
- **1984**: Apple Introduces Macintosh Computer
- **1985**: Windows 1.0 and Nintendo System
- **1990**: World Wide Web (HTML)
- **1991**: ArcView 1.0
- **1993**: Pentium Microprocessor and Text Messaging
- **1997**: AOL Instant Messenger
- **1998**: Google
- **1999**: Wi-Fi, Napster, and TiVo
- **2001**: Windows XP and iPod
- **2002**: Camera Phone
- **2003**: Skype
- **2004**: Facebook
- **2005**: YouTube
- **2006**: Twitter
- **2007**: iPhone, Netflix, and Hulu
- **2010**: iPad
Technology Use

WHERE MILLENNIALS USE SOCIAL MEDIA

Or where don’t they use social media?

2X

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

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

- All: 57%
- Millennial: 83%
- Gen X: 68%
- Boomer: 50%
- Silent: 20%

Source: Pew Research Center
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

- **At a family dinner**
  - Millennial: 28
  - Gen X: 20
  - Boomer: 20
  - Silent: 31

- **During a class or lecture**
  - Millennial: 12
  - Gen X: 16
  - Boomer: 5
  - Silent: 22

- **During a business meeting**
  - Millennial: 18
  - Gen X: 13
  - Boomer: 13
  - Silent: 7

- **At church or worship service**
  - Millennial: 12
  - Gen X: 12
  - Boomer: 5
  - Silent: 3


Source: Pew Research Center
Technology Use

Generations, Facebook and Friends

Median number of friends

- Millennial: 250
- Gen X: 200
- Younger Boomer: 98
- Older Boomer/Silent: 50

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

PEW RESEARCH CENTER
Educational Attainment

Source: Pew Research Center
Educational Attainment

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

Note: Shaded areas represent economic downturns.

PEW RESEARCH CENTER

Source: Pew Research Center
### Disparity among Millennials Ages 25-32 By Education Level in Terms of Annual Earnings...

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

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor's degree or more</td>
<td>$45,500</td>
</tr>
<tr>
<td>Two-year degree, Some college</td>
<td>$30,000</td>
</tr>
<tr>
<td>High school graduate</td>
<td>$28,000</td>
</tr>
</tbody>
</table>

### Unemployment Rate...

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor's degree or more</td>
<td>3.8</td>
</tr>
<tr>
<td>Two-year degree, Some college</td>
<td>8.1</td>
</tr>
<tr>
<td>High school graduate</td>
<td>12.2</td>
</tr>
</tbody>
</table>

### And Share Living in Poverty...

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor's degree or more</td>
<td>5.8</td>
</tr>
<tr>
<td>Two-year degree, Some college</td>
<td>14.7</td>
</tr>
<tr>
<td>High school graduate</td>
<td>21.8</td>
</tr>
</tbody>
</table>

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.


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Source: Pew Research Center
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

- Bachelor's degree or more
- Two-year degree/Some college
- High school graduate

$50 thousand

- $45,500
- $43,663
- $44,770

$40

- $41,989
- $36,498
- $34,595

$30

- $38,833
- $33,655
- $32,299

$20

- $31,384
- $32,999
- $30,525


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.


PEW RESEARCH CENTER
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

PEW RESEARCH CENTER
Stagnant Wages

... Median Annual Earnings Have Remained Relatively Flat

(among full-time workers, in 2012 dollars)

$50 thousand

$30,982 $34,883 $32,173 $35,000

$33,578

Silents Early Late Gen Millennials

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.


PEW RESEARCH CENTER
Employment, Unemployment, & Underemployment

Unemployment Rate, by Age, 1990-2011

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


Source: Pew Research Center
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

- Taken a job just to pay the bills: 49%
- Gone back to school: 35%
- Taken an unpaid job: 24%
- Moved back in with parents: 24%
- Postponed having a baby: 22%
- Postponed getting married: 20%

Note: Based on adults ages 18-34, n=808.
PEW RESEARCH CENTER Q29

Source: Pew Research Center
### Millennial Employment by Sector on the Wasatch Front

<table>
<thead>
<tr>
<th>Sector</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Trade</td>
<td>16%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>14%</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>12%</td>
</tr>
<tr>
<td>Administrative &amp; Support, Waste Management and Remediation</td>
<td>8%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>7%</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>5%</td>
</tr>
<tr>
<td>Construction</td>
<td>5%</td>
</tr>
<tr>
<td>Educational Services</td>
<td>6%</td>
</tr>
<tr>
<td>Manufacturing, Waste Management and Remediation</td>
<td>8%</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services</td>
<td>5%</td>
</tr>
<tr>
<td>Administrative &amp; Support, Waste Management and Remediation</td>
<td>8%</td>
</tr>
<tr>
<td>Educational Services</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Longitudinal Employer-Household Dynamics data – 2011
Transportation Preferences

FIGURE 2:
AGE AND TRANSIT USE

Source: TransitCenter: Who’s On Board 2014 – Mobility Attitudes Survey
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%)

Source: American Public Transit Association *Millennials and Mobility Survey*
Key advantages of transit

• Pay-per-use (58%)

• Protecting the environment (50%)

• The ability to socialize online (44%)

• Creating community (44%)

Source: American Public Transit Association Millennials and Mobility Survey
Along the Wasatch Front:
Millennials with driver’s licenses

16-19 Year Olds with Drivers Licenses
Utah vs. National Average

Trend: -.67% / year
Trend: -.82% / year

Source: Utah Department of Motor Vehicles; Department of Transportation Highway Statistics
Along the Wasatch Front: Mode & distance comparison

Source: 2012 Utah Household Travel Survey
Why Millennials Ride Transit
(Ranked on a scale of 5)

- Protect Environment: 3.5
- Save Money: 3.5
- Convenience: 3.0
- Time to Work: 2.5
- Exercise: 2.0
- Time to Socialize: 1.5
- Get to know Community: 1.0

Source: UTA Millennials Survey
UTA Millennial Survey: Ridership frequency & access

First Mile

Access to Transit

Last Mile

50% 17% 33%

75% 17% 8%

Ridership Frequency

<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
<th>SATURDAY</th>
<th>SUNDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>57.4%</td>
<td>37.9%</td>
<td>57.4%</td>
<td>37.9%</td>
<td>57.4%</td>
<td>37.9%</td>
<td>57.4%</td>
</tr>
</tbody>
</table>

Source: UTA Millennials Survey
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**

*Source: Enterprise Carshare membership data*
## Location Decision Factors

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

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

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

Source: *Investing in Place: Two Generations' View on the Future of Communities: Millennials, Boomers, and New Directions for Planning and Economic Development*, APA, May 2014
## 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?

<table>
<thead>
<tr>
<th>A suburb where most people drive to most places</th>
<th>Nat</th>
<th>Mil</th>
<th>AB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now</td>
<td>40%</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>Someday</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Change</td>
<td>-33%</td>
<td>-33%</td>
<td>-32%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>A suburb with walkable amenities</th>
<th>Nat</th>
<th>Mil</th>
<th>AB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now</td>
<td>18%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>Someday</td>
<td>21%</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Change</td>
<td>+3%</td>
<td>+6%</td>
<td>+5%</td>
</tr>
</tbody>
</table>

Source: *Investing in Place: Two Generations’ View on the Future of Communities: Millennials, Boomers, and New Directions for Planning and Economic Development*, APA, May 2014
Housing Preferences

Preferred versus Actual Community Type

- City - downtown area: Preferred 8%, Actual 5%
- City - residential area: Preferred 11%, Actual 19%
- Suburb - mix of housing, businesses: Preferred 28%, Actual 26%
- Suburb - housing only: Preferred 12%, Actual 19%
- Small town: Preferred 18%, Actual 14%
- Rural area: Preferred 22%, Actual 16%

Source: Belden, Russonello & Stewart LLC The 2011 Community Preference Survey What Americans are looking for when deciding where to live, March 2011
Along the Wasatch Front: Millennial population Density

Source: U.S. Census – 2000 and 2010
Housing Preferences

DISTRIBUTION OF PREFERRED PRODUCT TYPES BY GENERATION

Housing Preferences

![Projected Renter Household Growth, 2010–20 (Millions)](image)

Source: Joint Center for Housing Studies of Harvard University America’s Rental Housing: Meeting Challenges, Building Opportunities, 2011
“Do-Gooders” but Distrustful

### Young and Ambitious

<table>
<thead>
<tr>
<th>% saying each is one of the most important or a very important thing in their life</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Being successful in a high-paying career or profession ...</strong></td>
</tr>
<tr>
<td>18-24</td>
</tr>
<tr>
<td>25-34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Having a job or career that benefits society ...</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
</tr>
<tr>
<td>25-34</td>
</tr>
</tbody>
</table>

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

### Measuring Social Trust

<table>
<thead>
<tr>
<th>% who say most people can be trusted</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-29</td>
</tr>
<tr>
<td>30+</td>
</tr>
</tbody>
</table>

Source: Data from 1997 through 2006 are from surveys conducted by the Pew Research Center for the People & the Press.
What does this MEAN for Urban Planners?
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
Opportunity is Now

- Build infrastructure to support all modes
- Reinforce travel behavior and establish travel patterns
Supportive Zoning, Development and Design for these Choices

- Bike accommodations
- Sidewalks
- Parking incentives
- Landscaping
- Emphasis on design
- Support First/Last Mile
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!!!

Source: Envision Utah, Utah’s Values and Future Growth Report by Harris Interactive, 2007
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

Source: AC Nelson, Metropolitan Research Center, University of Utah
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

NETFLIX

Amazon
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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Wasatch Front Regional Council
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“And this app shows what’s right in front of me.”