



MILLENNIALS & MOBILITY:

UNDERSTANDING
THE MILLENNIAL
MINDSET



Executive Summary

The Millennial Generation, those born between 1982 and 2003, is the largest and most diverse generation in American history. According to *Millennial Makeover*, a seminal volume on generational change, 40% of Millennials are African American, Latino, Asian or racially-mixed compared to only 25% of the next two older generations.

Millennials are also living through times of economic dislocation and technological change. History shows that the combination of technological change, such as the advent of smartphone technology, television, or radio; combined with macro forces that shape behaviors, such as the Great Recession, the Great Depression, or World War II can lead to societal change that can last generations.

It is in this context that Millennials, with their relative propensity for urban lifestyle components (whether they live in cities or in suburbs), dexterity with technology, while starting careers during economically constrained times can leave a lasting impact on society. In fact, they are already driving trends.

Executive Summary (continued)

As has been noted in a number of reports, including US PIRG's report, "A New Direction: Our Changing Relationship With Driving and the Implications for America's Future", rates of driving is down in the US, and Millennials are leading the trend. This APTA/TCRP report seeks to further understand the mindsets behind the trends and understand their implications for public transportation in the United States. This study utilizes a mixture of in-depth interviews in five cities and a survey of 1,000 people in six cities that are representative of the types of cities Millennials find attractive.

Key Findings

Millennials are multimodal, they choose the best transportation mode (driving, transit, bike, or walk) based on the trip they are planning to take.

Communities that attract Millennials have a multitude of transportation choices, as proven by Millennial hotspots, popular zip codes where residents have self-selected into a multi-modal lifestyle.

Key Findings (continued)

Public transportation options are considered the best for **digital socializing** and among the most likely to **connect the user with their communities**. Transit also allows Millennials to work as they travel, a trend noted by 40% of those polled. These benefits of public transit need to be fully leveraged by the industry, as they provide a **clear competitive advantage**.

Reasons and motivations for transportation choices are pragmatic, with 46% stating that a need to save money drives their choices; 46% also note convenience, 44% want exercise, and 35% say they live in a community where it just makes more sense to use transit.

Millennials would like to see in the next ten years: 1) 61% more reliable systems, 2) 55% real-time updates, 3) 55% Wi-Fi or 3G/4G wherever they go, 4) 44% a more user-friendly and intuitive travel experience. Fully leveraging technology, through real-time transit applications that connect users with community amenities, through smartphone fare payment, and the provision of WiFi and 3G/4G, will **allow transit users to be more spontaneous, thus addressing the key competitive advantage of the car**.

STUDY OVERVIEW

Study Objectives:

- **Understand Millennials' lifestyle & decision-making processes with an emphasis on mobility (daily travel).** Identify specific factors affecting Millennials' lifestyle decisions, including post-recession attitudes about the economy, heightened environmental awareness, a renewed interest in local communities, shifting social values amongst peers, new information technologies, urban attraction, and so on.



- **Identify how Millennials make their mobility decisions** in a holistic way (e.g., considering all means of transportation: driving personal vehicles, public transit, other mobility options such as biking, walking, car-sharing, etc.)—taking into account the effect of major life decisions on mobility choices (e.g., where to live, where to work). Additionally, understand how these considerations may change as Millennials progress through life stages.



- **Identify key hurdles and benefits of various mobility options,** including accessibility, convenience, time, community/belongingness, fluidity with other mobility options (e.g., multi-modal transit), etc.



- **Uncover potential opportunities** for public transit providers to increase ridership—by improving messaging, information access, service offerings/accessibility, etc.

Study Design Overview:

Phase 1

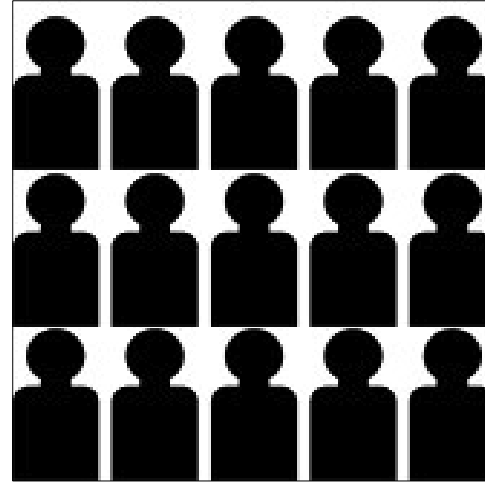
In-Depth Phone Interviews
& Mobility Journaling



✓ Completed:
Behaviors, Needs
and Attitudes
Identified
(December 2012)

Phase 2

Quantitative
Online Survey

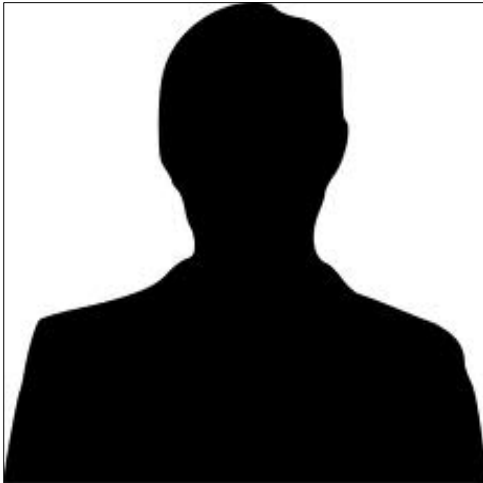


✓ Completed:
Engagement,
Attitudes &
Opportunities
Quantified
(April 2013)

Phase 1 Methodology Overview

We conducted 30-minute phone interviews with 11 transit riders across a mix of the following 5 markets:

- Boston
- San Francisco
- Austin
- Boulder
- Minneapolis

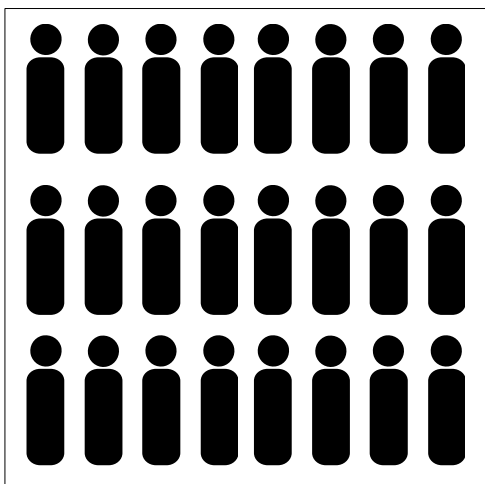


Interviewees were:

- Ages 18-34
- A mix of men and women
- Engaged with one or more forms of public transportation at least once per week
- A mix of car owners and non-car owners
- A mix of urban and suburban dwellers
- Of varying ethnicities
- Of various education & household income levels

Phase 2 Methodology Overview

Using key insights gleaned from the Phase 1 in-depth phone interviews, we designed and executed a large-scale quantitative survey focused on quantifying Millennials' mobility motivations, behaviors and related opportunities.



Study Design:

n=1,000 total participants, distributed across 6 urban areas (Boston, Chicago, San Francisco, Seattle, Portland & Washington DC), completed this ~17 minute online survey.

Primary goals:

- Explore attitudes toward mobility generally, including factors that play a role in mobility decision-making (e.g., social, financial, environmental, etc.) and the relationship between major life decisions (e.g., where to live and work) to specific transportation choices.
- Understand current mobility behaviors across demographic/lifestyle groups, and identify common (and unique) pain points and benefits.
- Uncover opportunities for promoting transit options, including new digital offerings, updated communications approaches, and “experience planning.”

Fielding was completed with n=1000 total with some tweaks to original screening criteria & quotas, which are summarized in the appendix of this report. Final data was weighted to even out distribution of age & gender groups within and across each city surveyed, allowing for a more accurate analysis of differences by various sample groups.

Context for this document:

This study, sampling & report was designed to:

- ✓ Speak with **Millennials** living within or just outside of **urban centers** who are **using public transit & other transportation** options,
- ✓ Understand **Millennial mindsets around their living & transportation choices** – and look at self-reported behaviors, observed trends & changes **from their perspective or thinking**,
- ✓ Provide a **summary of observations** from collected data & suggest **potential opportunity areas** for public transit to meet emerging needs, fill gaps in present offerings, or inform future strategies for better serving or “speaking” with this group.

Mobility Option Awareness, Engagement, Motivations, Barriers

Overview of Transportation Modes: Top 5 Most Preferred Modes of Transportation



Mean Preference Rank (Where 1 is Most Preferred):

(note: survey participant ranking of options was a list of those they used 'a few times a year or more often')

Frequency of Transportation Mode Use

Q11 - Please tell us, which of these transportation options are available to you, and how often do you use each if available? (% Top 2 Box Shown, 'a few times a week +')	TOTAL	Boston, MA	Chicago, IL	San Francisco, CA	Seattle, WA	Portland, OR	Washington, DC	Ages 22 to 27	Ages 28 to 34
n=	1000	167	167	167	167	167	167	500	500
Walking	79%	80%	86%	75%	77%	77%	75%	80%	77%
Driving a car (borrowed, belonging to you or your household)	63%	60%	63%	59%	66%	64%	66%	58%	68%
Public Transit: Bus	45%	39%	51%	50%	49%	42%	39%	46%	44%
Public Transit: Subway or Light Rail or Streetcar or Trolley rail	43%	56%	52%	49%	18%	34%	50%	45%	41%
Public Transit: Commuter Rail	32%	24%	45%	37%	19%	34%	31%	32%	31%
Riding a bicycle (belonging to you or your household)	26%	32%	23%	26%	26%	32%	18%	28%	24%
Car-pooling or ride-sharing (through services such as Zimride, Lyft, Sidecar, through people at work, etc.)	25%	20%	25%	28%	26%	26%	23%	28%	21%
Car-sharing (through services such as Zipcar, City CarShare, etc.)	15%	10%	19%	16%	17%	11%	18%	16%	14%
Taxi	14%	14%	23%	14%	12%	8%	14%	13%	16%
Bike-sharing (through public or private services such as Alta Bicycle Share, Bcycle, DecoBikes, etc.)	12%	9%	-	-	-	-	11%	12%	11%
Using a skateboard, longboard, or rollerblades (belonging to you or your household)	11%	10%	15%	12%	10%	8%	11%	13%	9%
Public Transit: Ferry	11%	8%	-	11%	10%	14%	-	12%	9%
Riding a motorized scooter or moped (belonging to you or your household)	10%	10%	13%	11%	7%	10%	10%	10%	10%

Highlighting in chart above shows relative differences in cell values across these transportation options & survey response options. (Note - the colors and shading on these tables can best be viewed in a full-color version of the report)

Transportation Options: Perceived Benefits

Q113 - Please check the items that describe the benefits or value of these transportation options. (n varies, among randomized subset of those use this transportation option more than 'never')	Owner Operated:					Public Transit:				For Hire:	Share-Based:		
	Walking	Driving a car	Motor scooter or moped	Bicycle	Skate-board, long-board, or roller-blades	Subway, Light Rail, Street car, or Trolley	Commu-ter Rail	Bus	Ferry	Taxi	Car-pooling or ride-sharing	Car-sharing	Bike-sharing
n=	467	397	68	233	79	382	280	384	89	180	201	130	86
Is an affordable option for me	70%	34%	29%	58%	40%	48%	45%	55%	25%	13%	38%	30%	25%
Is better for the environment	73%	8%	24%	64%	49%	50%	40%	41%	27%	8%	38%	26%	31%
Is reliable & generally on-time	36%	60%	25%	29%	26%	47%	47%	40%	26%	30%	29%	39%	27%
Allows me to be spontaneous & flexible	53%	69%	29%	44%	44%	28%	23%	24%	24%	35%	19%	30%	26%
Is clean & has a good environment	56%	42%	22%	46%	27%	34%	32%	22%	29%	19%	37%	30%	27%
Helps me feel more connected to my community & the area I reside in	58%	16%	34%	40%	32%	44%	33%	36%	30%	13%	28%	27%	29%
Allows me to pay-per-use (rather than a monthly fee)	10%	20%	14%	14%	24%	55%	49%	58%	34%	47%	20%	36%	22%
Feels like a good "community" of commuters or people like me	34%	16%	21%	36%	25%	41%	44%	37%	36%	10%	43%	28%	25%
I get more time to socialize (online, or via mobile)	27%	19%	11%	17%	27%	44%	43%	46%	39%	26%	34%	28%	23%
Offers the most personal space	46%	71%	21%	31%	26%	15%	14%	12%	28%	32%	20%	31%	23%
I can continue working easily	23%	36%	24%	24%	18%	45%	35%	37%	26%	22%	26%	21%	26%
Offers a subscription or monthly payment option	9%	14%	18%	8%	19%	43%	43%	45%	29%	10%	24%	29%	15%
Has great amenities (e.g. bike racks, Wi-Fi, outlets, etc.)	11%	19%	11%	21%	25%	32%	36%	31%	25%	16%	19%	24%	16%

Highlighting in chart above shows relative differences in cell values across these transportation options & survey response options.
(Note - the colors and shading on these tables can best be viewed in a full-color version of the report)

Transportation Options: Situational Value

Q112 - This transportation option is best for when... (n varies, among randomized subset of those use this transportation option more than 'never')	Owner Operated:					Public Transit:				For Hire:	Share-Based:		
	Walking	Driving a car	Motor scooter or moped	Bicycle	Skateboard, long-board, or roller-blades	Subway, Light Rail, Street car, or Trolley	Commuter Rail	Bus	Ferry	Taxi	Car-pooling or ride-sharing	Car-sharing	Bike-sharing
n=	467	397	68	233	79	382	280	384	89	180	201	130	86
I'm traveling alone	46%	47%	31%	39%	31%	43%	39%	47%	30%	26%	17%	25%	37%
It's the weekend	50%	58%	24%	49%	40%	39%	31%	32%	24%	30%	24%	34%	21%
It's nice outside	81%	26%	39%	65%	54%	29%	23%	25%	30%	8%	16%	24%	33%
I'm meeting up with friends or family	36%	63%	21%	25%	28%	46%	39%	37%	21%	30%	41%	35%	21%
It's the work week or school week	36%	51%	23%	29%	28%	49%	45%	47%	22%	16%	29%	30%	23%
I'm taking another transportation option in combination with this	52%	30%	19%	24%	29%	54%	48%	52%	26%	17%	19%	21%	26%
I'm headed to or from work	34%	55%	18%	21%	15%	50%	43%	52%	18%	20%	38%	29%	20%
I need to get somewhere as soon as possible	13%	76%	30%	21%	14%	28%	31%	27%	23%	52%	31%	40%	15%
The weather is bad	7%	72%	13%	7%	10%	39%	38%	42%	25%	49%	42%	44%	13%
I'm running errands or shopping	36%	75%	18%	17%	19%	28%	26%	33%	15%	17%	32%	35%	21%
I need exercise	85%	8%	20%	68%	49%	19%	18%	18%	18%	4%	9%	13%	41%
I'm traveling with kids	22%	63%	14%	11%	20%	29%	28%	25%	26%	22%	29%	41%	17%

Highlighting in chart above shows relative differences in cell values across these transportation options & survey response options.
(Note - the colors and shading on these tables can best be viewed in a full-color version of the report)

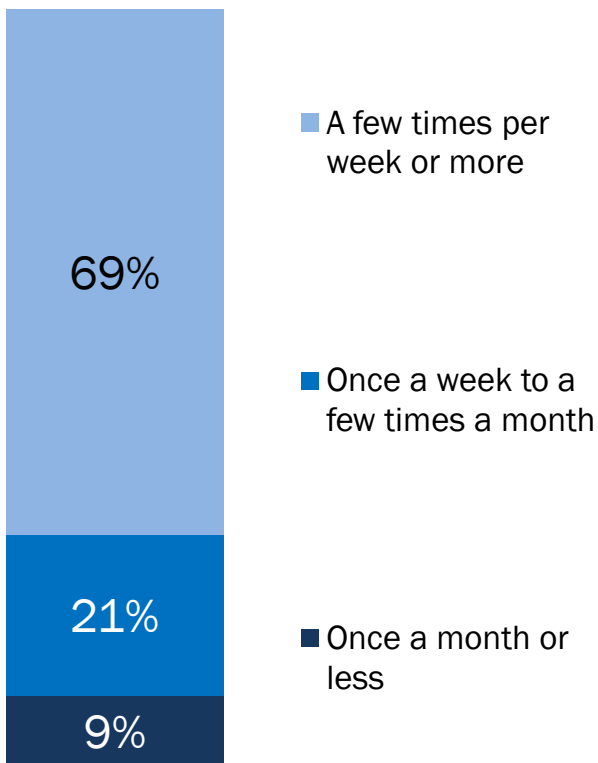
Overview of Transportation Modes: Situations, Benefits & Barriers

	Owner Operated:					Public Transit:				For Hire:	Share-Based:		
	Walking	Driving a car	Motor scooter or moped	Bicycle	Skateboard, Rollerblades	Subway, Light Rail, Street car, Trolley	Commuter Rail	Bus	Ferry	Taxi	Car-pooling or ride-sharing	Car-sharing	Bike-sharing
Top Optimal Situations (Q112)	Nice outside Need exercise	Getting there ASAP Bad weather Errands or shopping	Nice outside Alone	Need exercise Nice outside	Nice outside Need exercise	Used in combo w/ another mode To or from work	Used in combo w/ another mode Work week or school week	Used in combo w/ another mode To or from work Alone	Alone Nice outside Used in combo w/ another mode With kids	Getting there ASAP Bad weather	Bad weather Meeting w/ friends & family	Bad weather With kids	Need exercise Alone Nice outside
Top Perceived Benefits (Q113)	Better for environment Affordable	Most personal space Spontaneity & flexible	Feel community connection Spontaneity & flexible Affordable	Better for environment Affordable	Spontaneity & flexible Affordable	Pay-per-use Better for environment	Pay-per-use Reliable & On-time	Pay-per-use Affordable Socialize online	Socialize online Good community of people like me	Pay-per-use Spontaneity & flexible	Good community of people like me	Reliable & On-time Pay-per-use	Better for environment Feel community connection
Top Perceived Barriers (Q114)	Slow	Too Expensive	Not child-friendly Not compatible w/ other modes	Can't connect online or 3G/4G Slow	Slow	Lack of personal space	Lack of personal space	Lack of personal space	Too expensive	Too expensive	Lack of personal space	Expensive	Slow Not child-friendly Not compatible w/ other modes

Chart above summarizes the top ranking items across 3 questions – data detail can be found on the following pages.

Millennials frequently use multiple transportation options & describe this as an increasing trend.

Frequency of Using Multiple Transportation Options to Reach a Destination
(Among % Total)



3
is the average number of transportation options used on a typical trip

<i>Q34 - Which of these trends have you noticed others doing more of or seen more of in your own life or behaviors?</i>	TOTAL (n=1,000)
Using more than one transportation option to reach a destination	42%

Q16 - How often do you use more than one transportation option for getting to a destination? Please note, you should consider all options for transportation - including walking in answering this question. 7-Point Scale (n=1000)

Q17 - Please tell us, which combinations of options do you typically use together? Check All. Among those use more than one transportation option (n=980)

Reasons for multiple transportation options center around cost & convenience, but vary somewhat by city.

Q18 - Which of the following describe the reasons for or situations in which you use multiple transportation options to reach a destination?	TOTAL	Boston, MA	Chicago, IL	San Francisco, CA	Seattle, WA	Portland, OR	Washington, DC
n=	980	164	165	164	163	164	160
It helps me save money	42%	42%	44%	40%	53%	41%	33%
It is the best option logistically (shortest travel time)	42%	44%	41%	40%	45%	41%	42%
It's more convenient overall	42%	46%	41%	37%	41%	41%	43%
It helps me get more exercise (biking, walking some of the way)	32%	38%	34%	32%	35%	35%	20%
It allows me greater flexibility schedule-wise	29%	30%	25%	30%	27%	30%	31%
I can't avoid using multiple options because of where lines or services run to	29%	35%	36%	22%	22%	24%	35%
My smartphone or another online planning tool recommended it	15%	18%	20%	10%	16%	18%	10%
I missed a connection I was originally planning to catch	15%	9%	19%	12%	18%	21%	11%

Blue highlighting in chart above indicates a statistically significant difference between that cell and other(s) within the same row & sample group.

Lifestyle Factors & Choices that Impact Mobility

Current & Future Lifestyle / Setting Plans

Q23 - How well do these statements describe your attitudes about where you live & your plans for the future? (% TOP BOX 'Agree strongly')	TOTAL	Boston, MA	Chicago, IL	San Francisco, CA	Seattle, WA	Portland, OR	Washington, DC	Ages 22 to 27	Ages 28 to 34	Living w/ spouse or partner	Living w/ parents or other family	Living with roommates	Living alone	Do NOT have kids	PAR-ENTS (have kids 18 or under)
n=	1000	167	167	167	167	167	167	500	500	485	177	127	211	626	374
I'm currently pursuing a field of employment or study that I'm interested in	39%	45%	44%	37%	33%	39%	38%	39%	40%	39%	39%	44%	38%	39%	40%
Having a family doesn't mean you have to move out of the city	38%	34%	42%	33%	41%	50%	30%	41%	36%	38%	40%	38%	39%	36%	42%
I'm still trying to figure things out (e.g. what I want to do, where I'll end up)	31%	32%	36%	28%	34%	28%	25%	32%	30%	25%	44%	33%	30%	29%	33%
I picture myself residing long-term in a urban setting	29%	26%	31%	32%	31%	32%	23%	27%	32%	31%	25%	29%	30%	27%	34%
I picture myself residing long-term in a suburban setting	28%	31%	33%	26%	28%	30%	23%	25%	32%	32%	26%	27%	23%	23%	37%
Having a family doesn't mean you have to rush out and buy a car	28%	28%	28%	25%	32%	32%	24%	29%	28%	28%	30%	22%	32%	24%	36%
I'm already well-established in a field of work or study of interest to me	28%	27%	25%	33%	27%	29%	27%	26%	30%	33%	19%	28%	24%	24%	35%

Highlighting in chart above shows relative differences in cell values across these transportation options & survey response options.

(Note - the colors and shading on these tables can best be viewed in a full-color version of the report)

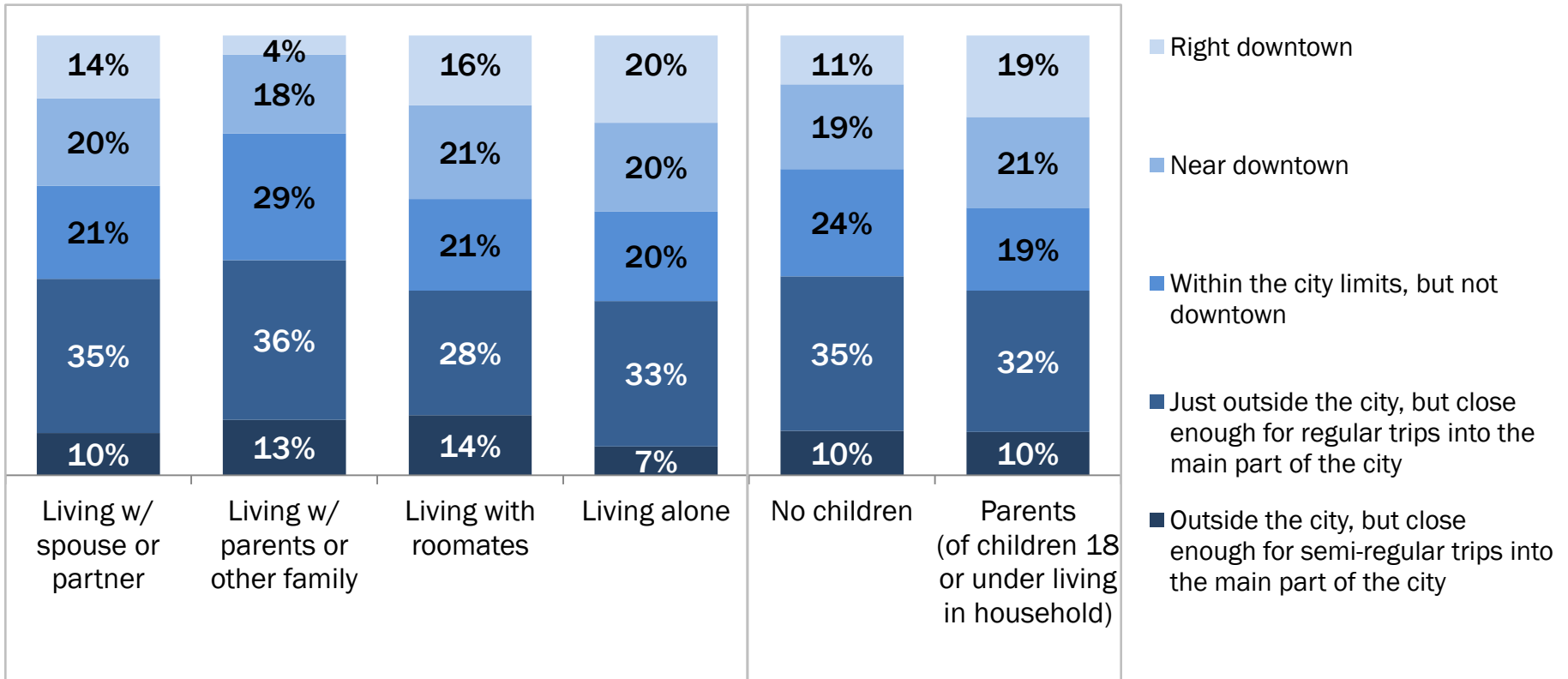
Overall, half have lived in the city for less than 5 years, half have been there for 5 or more. Those living in Seattle, with a spouse/partner, roommate were most likely to be “newcomers” to the cities they live in.

Q21 - How long have you lived in the city you're currently in? 4-point scale	TOTAL	Boston, MA	Chicago, IL	San Francisco, CA	Seattle, WA	Portland, OR	Washington, DC	Ages 22 to 27	Ages 28 to 34	Living with spouse or partner	Living with parents or other family	Living with roommates	Living alone	Do NOT have kids	PAR-ENTS (have kids 18 or under)
n=	1000	167	167	167	167	167	167	500	500	485	177	127	211	626	374
2 years or less	19%	19%	16%	13%	25%	23%	20%	20%	19%	23%	6%	24%	20%	20%	18%
2-5 years	30%	34%	28%	29%	30%	24%	36%	31%	30%	32%	23%	33%	30%	32%	28%
5-10 years	19%	20%	16%	22%	19%	18%	16%	18%	19%	20%	12%	23%	19%	16%	23%
10+ years	32%	26%	40%	36%	26%	35%	27%	32%	32%	25%	60%	20%	30%	32%	31%

Blue highlighting in chart above indicates a statistically significant difference between that cell and other(s) within the same row & sample group.

Those who live alone or are parents living with children are most likely to live in or near “downtown”.

Home Neighborhood Proximity to “Downtown”
 (Shown among Living Situation Groups & Parental Status)



Interestingly, there *aren't* significant differences between car owners & non-car owners when it comes “downtown” proximity.

Home Neighborhood Proximity to “Downtown” (Shown among Car Ownership status)	TOTAL	Currently own a car	Do NOT currently own a car	DIFFERENCE (in percentage points)
n=	1000	600	400	-
Right downtown	14%	13%	15%	+ 2 <i>ppts.</i>
Near downtown	20%	18%	22%	+ 4 <i>ppts.</i>
Within the city limits, but not downtown	22%	21%	24%	+ 3 <i>ppts.</i>
Just outside the city, but close enough for regular trips into the main part of the city	34%	36%	31%	- 5 <i>ppts.</i>
Outside the city, but close enough for semi-regular trips into the main part of the city	10%	11%	9%	- 2 <i>ppts.</i>

Personal Car Ownership & Purchase Plans

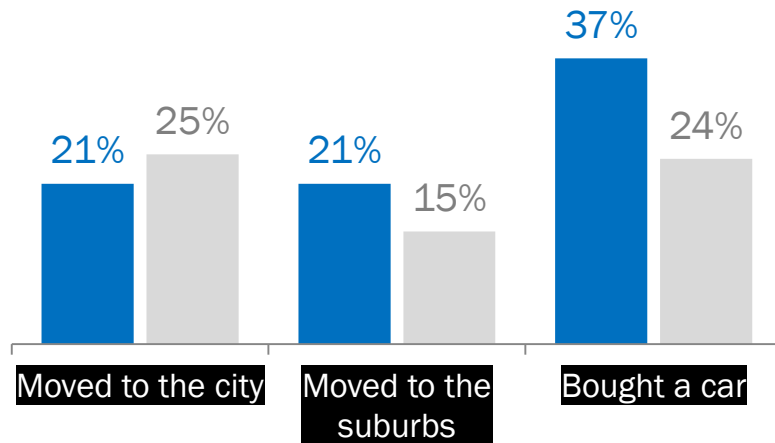
S9 - Which of the following best describes your car ownership status or plans?	TOTAL	Boston, MA	Chicago, IL	San Francisco, CA	Seattle, WA	Portland, OR	Washington, DC	Ages 22 to 27	Ages 28 to 34
n=	1000	167	167	167	167	167	167	500	500
Car Owners vs. NON Car Owners									
Currently own a car	60%	57%	53%	64%	58%	59%	69%	55%	65%
Do NOT currently own a car	40%	43%	47%	36%	42%	41%	31%	45%	35%
Car Ownership Plans									
I currently own a car (personally)	60%	57%	53%	64%	58%	59%	69%	55%	65%
I have regular access to a car someone else in my household owns	16%	18%	20%	19%	17%	14%	9%	18%	14%
I don't currently own a car, but plan to buy one within the next 1-2 years	15%	13%	19%	11%	18%	14%	14%	17%	13%
I don't currently own a car, and have no plans to buy one in the immediate future	9%	13%	8%	7%	7%	13%	8%	10%	8%
S10 - How many cars are owned by people in your household, including yourself?									
n=	1000	167	167	167	167	167	167	500	500
Mean # of Cars in household	1.55	1.35	1.52	1.62	1.69	1.71	1.41	1.62	1.48
Median # of Cars in household	1.00	1.00	1.00	1.00	1.00	2.00	1.00	1.00	1.00

Blue highlighting in chart above indicates a statistically significant difference between that cell and other(s) within the same row & sample group.

Millennials who are parents were more likely to have bought a car, but only slightly more likely to have moved to suburbs than non-parents.

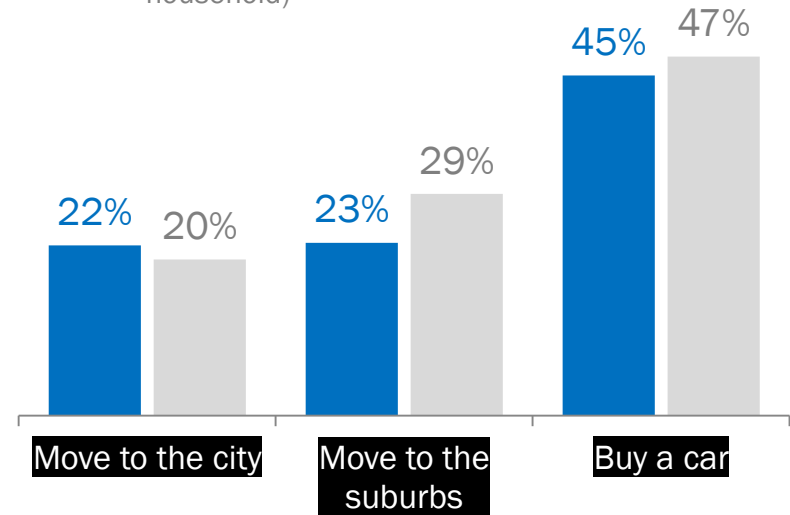
% Say this occurred within the **past 1-2 years**
(Among % Parents & Non-Parents)

- Parents (of children 18 or under living in household)
- No children (aged 18 or under living in household)



% Say they anticipate this happening within the **next 5 to 10+ years**
(Among % Parents & Non-Parents)

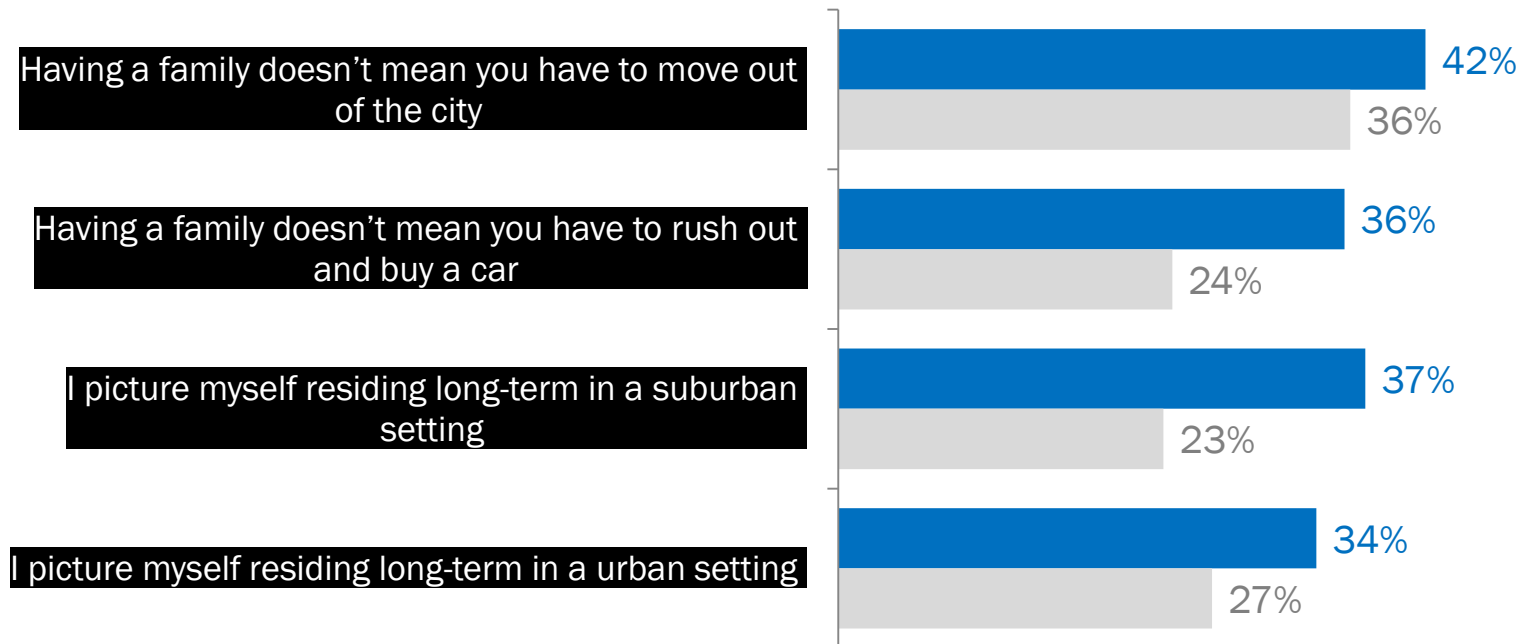
- Parents (of children 18 or under living in household)
- No children (aged 18 or under living in household)



On an attitudinal level, Millennial parents may be more likely to feel **freedom in options** for how they'd like to live – with or without a car, in an urban or suburban environment.

% Agree Strongly (Top Box)
(Among % Parents & Non-Parents)

- Parents (of children 18 or under living in household)
- No children (aged 18 or under living in household)



Millennial parents may be more likely to “opt-in” to car ownership – as part of a multi-modal strategy to have options for getting around.

Q16 - How often do you use more than one transportation option for getting to a destination?	Parents (have kids under 18 living in household)	Do NOT have kids
n=	374	626
% Use more than one transportation option for getting to a destination daily	43%	33%

S10 - How many cars are owned by people in your household, including yourself?	Parents (have kids under 18 living in household)	Do NOT have kids
n=	374	626
Mean # of cars owned in household	1.70	1.46

Q19 - Which of these describe how your car fits into your transportation routine? (Asked among car owners)	Parents (have kids under 18 living in household)	Do NOT have kids
n=	253	347
I can't get to the places I need to without a car (at least some of the time)	27%	36%

Millennial parents are more likely to be using multiple transportation options on a daily basis.

They're more likely to have multiple cars in their household, but interestingly, among car owners, Millennial parents were *less* likely to feel they *have* to have a car to get to the places they need to.

Ease of getting around, public transit availability, proximity to work, & city culture are among top reasons for current living location.

Q22 - Which of the following best describe the reasons you choose to live in this area? I live in this area because... Check All (n varies by sample group)	TOTAL	Boston, MA	Chicago, IL	San Francisco, CA	Seattle, WA	Portland, OR	Washington, DC
n=	1000	167	167	167	167	167	167
It is an easy city to get around	42%	45%	41%	43%	38%	48%	38%
It's close to my work	38%	40%	34%	42%	37%	31%	43%
I love the culture here	37%	37%	39%	37%	37%	44%	28%
There are plenty of public transit options available	36%	38%	35%	36%	34%	39%	36%
My family lives here	36%	33%	36%	42%	35%	40%	29%
My friends or significant other lives here	35%	35%	33%	36%	31%	40%	33%
There are lots of career opportunities	32%	30%	28%	34%	34%	24%	44%
It's a pedestrian-friendly city	31%	36%	22%	35%	28%	42%	23%
I grew up here	31%	29%	29%	31%	32%	42%	21%
I wanted to be in an urban location	24%	31%	32%	24%	17%	16%	23%
I don't feel "trapped" or stuck with what's around me	22%	24%	16%	23%	19%	31%	20%
I can be around like-minded people	21%	21%	21%	19%	21%	28%	19%
There are smaller neighborhoods or boroughs with distinct communities & offerings	20%	21%	18%	19%	22%	23%	17%
I wanted to be in a suburban location	16%	13%	15%	19%	16%	14%	19%
I have children now	12%	9%	11%	10%	16%	13%	12%
It was the only place I could afford	11%	10%	18%	13%	11%	6%	8%
I want to have kids someday	10%	10%	12%	9%	10%	11%	7%

Highlighting in chart above shows relative differences in cell values across these transportation options & survey response options.
 (Note - the colors and shading on these tables can best be viewed in a full-color version of the report)

Millennials living with roommates were most likely group to describe mobility-related options as reason for living where they do.

Q22 - Which of the following best describe the reasons you choose to live in this area? I live in this area because... Check All (n varies by sample group)	Living w/ spouse or partner	Living w/ parents or other family	Living with room- mates	Living alone
n=	485	177	127	211
It is an easy city to get around	39%	45%	51%	42%
It's close to my work	37%	30%	44%	42%
I love the culture here	41%	32%	37%	32%
There are plenty of public transit options available	36%	36%	38%	37%
My family lives here	32%	64%	26%	29%
My friends or significant other lives here	39%	37%	38%	21%
There are lots of career opportunities	33%	25%	37%	33%
It's a pedestrian-friendly city	29%	26%	42%	33%
I grew up here	24%	59%	24%	27%
I wanted to be in an urban location	24%	21%	31%	22%
I don't feel "trapped" or stuck with what's around me	22%	19%	27%	24%
I can be around like-minded people	24%	18%	26%	16%
There are smaller neighborhoods or boroughs with distinct communities & offerings	22%	16%	21%	16%
I wanted to be in a suburban location	19%	12%	12%	13%
I have children now	19%	7%	3%	4%
It was the only place I could afford	10%	16%	8%	11%
I want to have kids someday	13%	9%	5%	6%

Those living with a spouse or partner were most likely to say **loving the city culture & their significant other** were reasons for living in their current location.

Those living with family unsurprisingly described **growing up, family ties & money** as reasons for living where they do now.

Those **living with roommates** were the most likely group to cite the city's **transportation-related attributes & pedestrian-friendliness** as reasons for their current living location.

Highlighting in chart above shows relative differences in cell values across these transportation options & survey response options.

(Note - the colors and shading on these tables can best be viewed in a full-color version of the report)

Those without children are more likely to live in an area because of the public transportation options available.

Q22 - Which of the following best describe the reasons you choose to live in this area? I live in this area because... Check All (n varies by sample group)	Do NOT have kids	PARENTS (have kids 18 or under)
n=	626	374
It is an easy city to get around	45%	37%
It's close to my work	39%	36%
I love the culture here	37%	36%
There are plenty of public transit options available	40%	29%
My family lives here	35%	38%
My friends or significant other lives here	36%	32%
There are lots of career opportunities	35%	28%
It's a pedestrian-friendly city	32%	30%
I grew up here	33%	27%
I wanted to be in an urban location	26%	20%
I don't feel "trapped" or stuck with what's around me	24%	20%
I can be around like-minded people	22%	21%
There are smaller neighborhoods or boroughs with distinct communities & offerings	19%	21%
I wanted to be in a suburban location	13%	20%
I have children now	1%	30%
It was the only place I could afford	10%	12%
I want to have kids someday	10%	9%

Those who are not parents were more likely to say that the city's transportation-related attributes & pedestrian-friendliness, career opportunities & active choice to live in an urban as reasons for their current living location.

That said, even among parents, 29% said availability of public transit options was a motivation for living in the area they do, suggesting there's a smaller, but still sizeable group of parents with similar urban-centric / public transit priorities.

Highlighting in chart above shows relative differences in cell values across these transportation options & survey response options.

(Note - the colors and shading on these tables can best be viewed in a full-color version of the report)

Millennial “Hot Spot” Neighborhoods vs. Non Residents

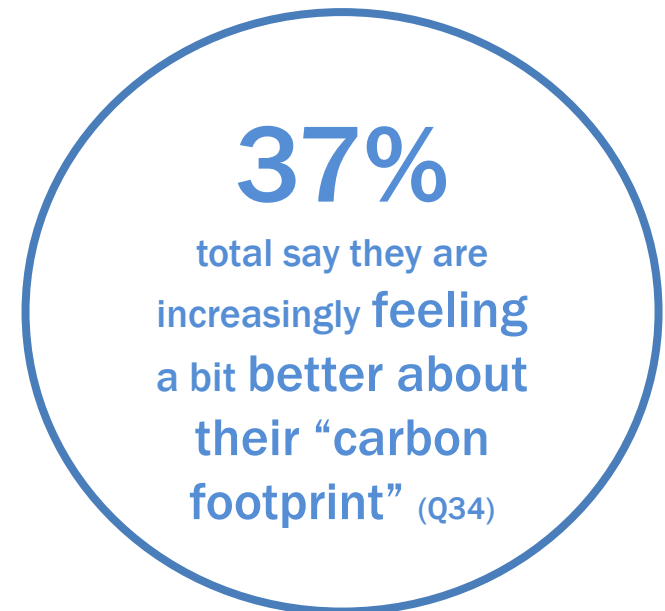
- Using a subset of zip codes considered to be “Millennial Hot Spots” across surveyed cities, **1/3 of the survey sample** was defined as living in one of these Millennial “hot spot” neighborhoods.
- Those living in a “hot spot” neighborhood are distinguished from those who do not in some of the following ways:
 - Less likely to personally **own a car, drive** one regularly, or frequently (weekly+) **use car-sharing** services
 - More likely to **use a bus & subway** a few times a week +
 - More likely to cite **ease of getting around**, wanting to live in an **urban location**, and **feeling connected to the area** as reasons for living where they do now
 - More likely to cite the need to **save money, avoid traffic**, not wanting the **burden of a car**, & caring about the **environment** as motivations behind their transportation choices/routines
 - More likely to have noticed rising trends of **trip-planning tools** being used, and **finding more to like in their local area** (e.g. hidden gems) as trends on the rise.

Transportation Trends & Motivations

Transportation Trends: ENVIRONMENTAL CONSIDERATIONS

Millennials care about the environment. San Franciscans & those living with roommates are the most likely to cite environmental considerations as a motivating factor in their transportation decisions.

<i>% Say 'I care about the environment' as a motivation for their transportation routine overall (Q31, n varies by sample group)</i>	
TOTAL	34%
Boston, MA	35%
Chicago, IL	33%
San Francisco, CA	42%
Seattle, WA	37%
Portland, OR	35%
Washington, DC	25%
Living with spouse or partner	33%
Living with parents or other family	36%
Living with roommates	44%
Living alone	31%
No children (aged 18 or under living in household)	37%
Parents (of children 18 or under living in household)	30%



Transportation Trends: ENVIRONMENTAL CONSIDERATIONS

The attribute of being “better for the environment,” was a top-ranking perceived benefit for **walking, biking, skate boarding, subway/light rail, as well as bike-sharing.**

% Say 'is better for the environment' as a benefit for this transportation option (Q113, n varies by mode)

Walking	73%
Bicycle (Owned)	64%
Public Transit: Subway, Light Rail, Streetcar, or Trolley	50%
Skateboard, longboard, or rollerblades	49%
Public Transit: Bus	41%
Public Transit: Commuter Rail	40%
Car-pooling or ride-sharing	38%
Bike-sharing	31%
Public Transit: Ferry	27%
Car-sharing	26%
Motor scooter or moped	24%
Taxi	8%
Driving a car (Owned)	8%

“Our generation grew up knowing all about the effects on the environment that cars can have, so we’ve grown up with an attitude of wanting to do our part for the earth - something that we can easily do with public transit and not with cars”

Transportation Trends: ENVIRONMENTAL CONSIDERATIONS

While Millennials consider the environment and their carbon footprint, other considerations have greater importance to their transportation decisions such as the cost, convenience, the ability to get exercise, and transit-friendly neighborhood preference.

Top 5 reasons or motivations for transportation choices or routines overall (Q31, Among % Total, n=1,000)	
I need to save money	46%
It is the most convenient	46%
It allows me to get some exercise (walking, biking, riding, etc.)	44%
I live in an area where it makes more sense to use public transit	35%
I care about the environment	34%

“I think my generation is more environmentally conscious because of all the research on the detrimental effects fossil fuels have on the environment, so I think more people in my generation try to reduce their carbon footprint”

Transportation Trends: SHARE-BASED OPTIONS

Although not in wide-spread use, Millennials are becoming increasingly aware of and interested in the idea of share-based transportation services.

Q34 - Which of these trends have you noticed others doing more of or seen more of in your own life or behaviors?	TOTAL (n=1,000)
Taking advantage of share programs & services (e.g. bike sharing, car sharing)	33%

“Most of my friends my age view bicycling as a viable option for transportation year-round. I’ve found that some of my older friends are more reluctant to embrace it. I see only growth for the use of bicycles - both owner-driven and bike-share in this community”

Transportation Trends:

WORKING ANYWHERE, AT ANYTIME

Millennials are mobile, and so is their work. Being able to connect with digital resources and accomplish work while traveling is a growing trend & an important benefit. That said, this anywhere/everywhere work style only reduces concern about time spent traveling for 1 in 5 Millennials.

Q34 - Which of these trends have you noticed others doing more of or seen more of in your own life or behaviors?	TOTAL (n=1,000)
Working while traveling	39%
Worrying less about going to work to get work done, and home to rest as I can now work or study from nearly anywhere	22%
Worrying less about reaching places on time than before	21%

“Many of us are happy with biking or walking, and see public transit as a way to meet people, connect, and have extra time to do work while commuting...and with smartphones it's easy to figure out bus schedules and keep connected while commuting”

Transportation Trends: SOCIAL & COMMUNITY CONNECTIONS (ONLINE & OFFLINE)

Millennials say they're getting more social while traveling – much of this taking place online or through mobile. They also display an increasing awareness of & desire for connection to “community” (e.g. experiencing / seeing more of the area they live in, seeing others “like me” in their transportation routines, etc.)

Q34 - Which of these trends have you noticed others doing more of or seen more of in your own life or behaviors?	TOTAL (n=1,000)
Socializing while traveling	36%
Finding more to like (e.g. hidden gems) in the area	33%
Feeling like a better member of the community	26%

Q31 - Which of these describe the reasons or motivations for your transportation choices or routines?	TOTAL (n=1,000)
I feel better connected to the area I live in	22%

“My generation is more willing to use public transit and alternative transportation to have less effect on the environment, save money, and to be more engaged with their community”

“We are more aware of how our actions impact the larger community”

Transportation Trends: SOCIAL & COMMUNITY CONNECTIONS (ONLINE & OFFLINE)

Public transit options were considered the most likely to allow for more socializing (digitally), and most likely to offer a good “community” feel. (Walking was also a top mode for this community-related benefit.)

Q113 - Please check the items that describe the benefits or value of each of these transportation options. (n varies, among randomized subset of those use this transportation option more than 'never')	Helps me feel more connected to my community & the area I reside in	Feels like a good “community” of commuters or people like me	I get more time to socialize (online, or via mobile)
Public Transit: Subway, Light Rail, Streetcar, or Trolley	44%	41%	44%
Public Transit: Commuter Rail	33%	44%	43%
Public Transit: Bus	36%	37%	46%
Walking	58%	34%	27%
Public Transit: Ferry	30%	36%	39%
Car-pooling or ride-sharing	28%	43%	34%
Bicycle (Owned)	40%	36%	17%
Skateboard, longboard, or rollerblades	32%	25%	27%
Car-sharing	27%	28%	28%
Bike-sharing	29%	25%	23%
Motor scooter or moped	34%	21%	11%
Driving a car (Owned)	16%	16%	19%
Taxi	13%	10%	26%

“It’s the technology age – fewer people are socializing in person and more are socializing online”

“We are more aware of how our actions impact the larger community. We live in an increasingly urban world where more people are choosing to live in cities and forgo the suburban lifestyle”

Highlighting in chart above shows relative differences in cell values across these transportation options & survey response options.
(Note - the colors and shading on these tables can best be viewed in a full-color version of the report)



Potential Takeaways for Future Millennial Transportation Offerings:

ENSURE MILLENNIALS CAN CONNECT to their digital world while traveling

<i>Q35 / Q36 - In the future (10 years from now), I'd like to see transportation options that...</i>	TOTAL (n=1000)
Ensure Wi-Fi or 3G / 4G connectivity everywhere I go	54%
Are more connected or tech-friendly	45%

Potential Takeaways for Future Millennial Transportation Offerings:

“My generation is strapped financially... we’ve acquired 50-100k in student loan debt – it forces us to start our adult life in debt... All this makes my generation need to be a bit more creative on how we get around town”

“I take the train to/from the city often, & used to for work but if it wasn't cost-effective so I would definitely drive now”

KNOW THAT MILLENNIALS WILL CONTINUE TO LOOK FOR WAYS TO SAVE MONEY:

Public transit providers should keep services as affordable as possible for those starting out on a new career, starting a family, and/or paying a premium on housing for an urban lifestyle (and keep options less than the cost of owning/running a car)

Q35 / Q36 - In the future (10 years from now), I'd like to see transportation options that...	TOTAL (n=1000)
Are more affordable	62%

Potential Takeaways for Future Millennial Transportation Offerings:

Where budgets constrain making core improvements to reliability & consistency, **OFFER DIGITAL TOOLS WITH REAL-TIME UPDATES** that reduce the “work” of figuring out an efficient trip even when there are delays, etc.



“We are well-connected when it comes to searching and finding information we need to plan our transportation ahead of time”

Q35 / Q36 - In the future (10 years from now), I'd like to see transportation options that...	TOTAL (n=1000)
Are more reliable	61%
Offer more real-time updates to help me avoid waiting longer than needed	55%
Are more user-friendly and intuitive (e.g. don't make me dig around for info)	44%
Are more precise	38%

Potential Takeaways for Future Millennial Transportation Offerings

HELP MILLENNIALS OPTIMIZE THEIR

EXPERIENCE: Consider offering tools & services that allow users to explore transportation/trip options based on their **TACTICAL NEEDS** (e.g., more efficient routes/times, ways to take advantage of new bike share programs, etc.), but *also* by **THEIR FRAME OF MIND** (e.g., ideal routes for enjoying great weather, staying 3G connected throughout trip to get work done, etc.)

Q36 - In the future (10 years from now), I'd like to see more technology & tool offerings that...	TOTAL (n=1000)
Help me optimize my entire travel experience across different options & locations	44%
Provide transportation options based on what mindset I may be in (e.g. routes perfect for good weather, bad weather, most cost efficient, etc.)	43%
Help me take advantage of more “ alternative ” transportation options (e.g. bike share, walking, etc.)	38%

“[With smartphones and other mobile devices, we can now find the best ways of transportation. This change in lifestyle and technology is what sets my generation apart from others”

Potential Takeaways for Future Millennial Transportation Offerings:

INTEGRATE WITH MILLENNIAL INTERESTS

- Make time spent with transportation mean a mix of social time, work time, and entertainment/media time for Millennials; consider offering features & partnerships that include both tactical info AND content/tools/games that deliver on the things they're already looking for.

EXPAND ON WHAT PUBLIC TRANSIT EXPERIENCE CAN/SHOULD BE:

- Create messaging & digital tools that play the role of a well-liked city bus driver: already an expert at navigating efficiently, but also able to offer personalized recommendations & interesting facts about the local area one would not have encountered on his or her own.

<i>Q35/Q36 - In the future (10 years from now), I'd like to see more technology & tool offerings that...</i>	TOTAL (n=1000)
Collect all of the information I care about in one place (e.g. times, locations, weather, local news headlines, alternative route options, etc.)	38%
Help me make local "discoveries" (e.g. restaurants, events, local news, local history and facts, other commuters' social network profiles, etc.)	36%
Are more connected to the community	34%
Are more connected to the things I'm doing at home (e.g. playing games, working, watching movies, checking out people's social media posts, etc.)	23%

Potential Takeaways for Future Millennial Transportation Offerings:

SPEAK TO MILLENNIALS' LIFESTYLES & NEEDS

by catering transportation services, messaging, & other offerings to Millennials as they progress through different life stages.

<i>Q35/Q36 - In the future (10 years from now), I'd like to see more technology & tool offerings that...</i>	TOTAL (n=1000)
Are more family-friendly or child-friendly	41%
Are more for working people or professionals	37%
Are more for students	30%



Image Credit: TheeErin

Acknowledgements

This study was conducted for the American Public Transportation Association (APTA), with funding provided through the Transit Cooperative Research Program (TCRP) Project J-11, *Quick-Response Research on Long-Term Strategic Issues*.

The TCRP is sponsored by the Federal Transit Administration (FTA); directed by the Transit Development Corporation, the education and research arm of the APTA; and administered by The National Academies, through the Transportation Research Board. Project J-11 is intended to fund quick response studies on behalf of the TCRP Oversight and Project Selection (TOPS) Committee, the FTA, and the APTA and its committees.

The work was guided by a project panel with representatives from several national and state transportation research and planning organizations, private consultants, and the American Public Transit Association (APTA).

Neela Sakaria and Natalie Stehfest of Latitude Research (the contractor) would like to acknowledge and thank the many respondents and interviewees who provided data and information about their transportation behaviors, attitudes & desires for future transportation offerings. Additionally, our deep appreciation goes to the project panel members and Dianne Schwager, the Senior Program Officer for this project, for their detailed review of study documents and thoughtful feedback.

Disclaimer

The opinions and conclusions expressed or implied are those of the research agency that performed the research and are not necessarily those of the Transportation Research Board or its sponsoring agencies. This report has not been reviewed or accepted by the Transportation Research Board Executive Committee or the Governing Board of the National Research Council.

**For more information, contact the American Public Transportation Association
(202) 496-4887/info@apta.com**