

COLORADO IN 2015

A ULI Survey of Views on Housing, Transportation, and Community



> ABOUT ULI

The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. Established in 1936, the Institute today has more than 36,000 members worldwide, representing the entire spectrum of the land use and development disciplines. ULI relies heavily on the experience of its members. It is through member involvement and information resources that ULI has been able to set standards of excellence in development practice. The Institute has long been recognized as one of the world's most respected and widely quoted sources of objective information on urban planning, growth, and development.

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Urban Land Institute **Terwilliger Center for Housing**

The mission of the ULI Terwilliger Center for Housing is to facilitate creating and sustaining a full spectrum of housing opportunities, including affordable and workforce housing, in communities across the country. The Center conducts research, performs analysis, and develops best practices and policy recommendations that reflect the residential development priorities of ULI's members across all residential product types. The Center was established in 2007 with a gift from longtime ULI member and former ULI chairman J. Ronald Terwilliger.

Urban Land Institute **Building Healthy Places Initiative**

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

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



The Colorado Health Foundation™

The Colorado Health Foundation works to make Colorado the healthiest state in the nation by ensuring that all Colorado kids are fit and healthy and that all Coloradans achieve stable, affordable, and adequate health coverage to improve their health with support from a network of primary health care and community services. To advance our mission, the Foundation engages the community through grant making, public policy and advocacy, private sector engagement, strategic communications, and evaluation for learning and assessment, and by operating primary care residency training programs.

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> COLORADO IN 2015

Colorado in 2015 is a companion study to *America in 2015*, an examination of what people desire from the communities and places they call home. *America in 2015* and *Colorado in 2015* were produced in partnership by ULI and the Colorado Health Foundation.

Like the national study, *Colorado in 2015* finds that residents have generally high levels of overall satisfaction with their homes and communities, which partially mask differences in preferences and perceptions, depending on demographic cohort, economic standing, community characteristics, and racial or ethnic background. Though Colorado mirrors the nation in high levels of satisfaction with the importance of healthy living and general housing preferences, there are some differences as well.

Satisfaction. Most Coloradans express satisfaction with the communities and places they call home, although some pockets of discontent exist. Low-income residents and renters are less satisfied than others with the quality of life in their communities. Millennials and renters—the most likely to move—are also the least satisfied with the housing options in their communities. At the other end of the age spectrum, older adults are even less confident of their ability to afford the home they want in the future.

Health. The study provides evidence that community design contributes to troubling health trends. Coloradans across the board express a strong desire for communities that support a healthy lifestyle. A clean environment and convenient access to fresh food are top priorities. Yet many communities are not meeting those desires, and a striking number of Coloradans report living in places that lack usable outdoor spaces for physical activity and that have other barriers to healthy lifestyles. Given these preferences, many communities may be missing an opportunity to retain and attract residents and develop new retail and services.

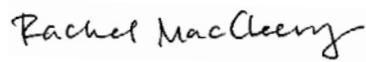
Preferences. About half of all Coloradans, and seven in ten millennials, say they plan to move in the next five years. Because of the size of this generational cohort, millennials represent a demographic juggernaut. Many Colorado millennials prefer walkable, bikeable communities; they also prefer culturally diverse communities. Although a plurality of millennials would live in cities if they could live anywhere, they also say they want single-family homes and believe they will be able to achieve that goal. Millennials represent a strong driver of demand for compact, mixed-use development formats in suburban or other locations.

The findings from *Colorado in 2015* have profound implications for the state's leaders in health and land use. We invite you to use the findings to inform action and spur change in the state.

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



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EXECUTIVE SUMMARY

COLORADO IN 2015

Recently, ULI published *America in 2015*, a national survey of Americans' preferences and priorities regarding their communities, housing, and transportation. The national survey was replicated in Colorado to explore Coloradans' community and housing priorities, as well as barriers to healthy communities and lifestyles.

93%

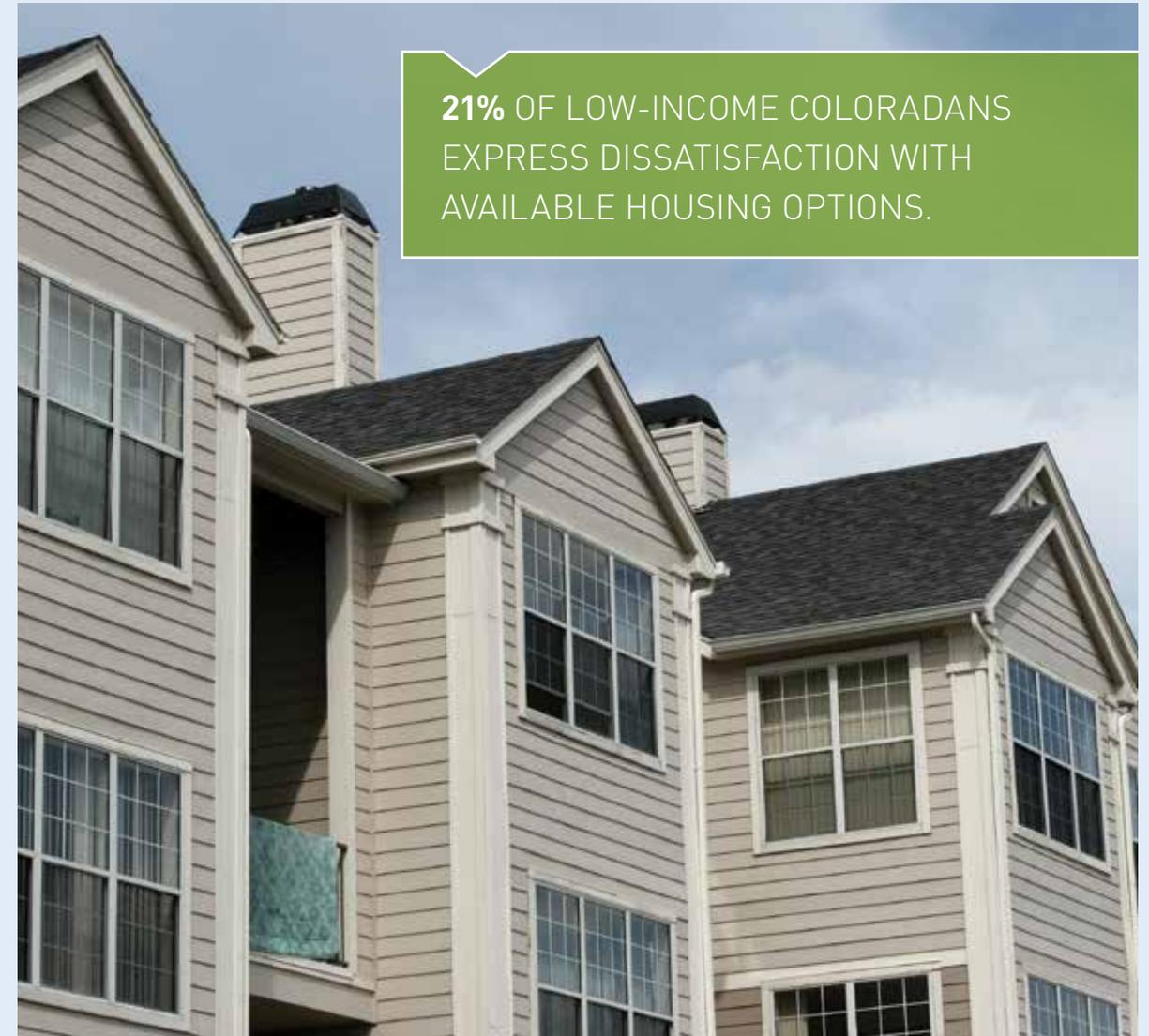
of Coloradans are satisfied with both the quality of life in their communities and their current homes.

HOW COLORADANS FEEL

Satisfaction with Communities and Housing

Coloradans, much like Americans as a whole, are largely satisfied with their communities and their homes. A majority of people in the state are satisfied with the quality of life in their communities, their current homes, and the range of housing options in their area. However, a degree of dissatisfaction creeps into the picture for certain demographic groups when considering the range of housing choices available in their communities.

- Nine in ten are satisfied with both the quality of life in their communities (93 percent) and their current homes (93 percent). Eighty-three percent are satisfied with the range of housing choices available to them.
- Twenty percent of millennials, 21 percent of low-income Coloradans, and 26 percent of renters express dissatisfaction with available housing options, as do 24 percent of those who are considering moving in the next five years.



21% OF LOW-INCOME COLORADANS EXPRESS DISSATISFACTION WITH AVAILABLE HOUSING OPTIONS.

Colorado Generations

18-36

Millennials, ages 18 to 36 (also known as generation Y), are the most diverse generation. They are more likely than others to be considered low income, more likely to rent, and most likely to be expecting to move in the next five years.

37-49

Generation Xers, ages 37 to 49, are predominantly owners of single-family homes and have the highest income of any generational cohort. Two-thirds of gen Xers have children age 18 and younger in their households.

50-68

Baby boomers, ages 50 to 68, are the most likely to live in the suburbs. Unlike generation X, they are more likely to be moving to smaller rather than larger homes in the next five years.

69+

The war babies and the silent generation are combined in this report because of those cohorts' smaller sizes. The war babies (ages 69 through 84) and the silent generation (age 85 and older) are most likely to already live in rural areas and small towns. If they move, it will be to a more convenient and accessible area.



64% OF COLORADANS CALL ACCESS TO GREEN SPACE, PARKS, AND RECREATION AREAS A TOP OR HIGH PRIORITY.

WHAT COLORADANS VALUE Community Attribute Priorities

Coloradans are drawn to neighborhoods that support a healthy lifestyle. They prioritize living in communities with a clean environment, ample green space to enjoy, and access to healthy foods. Other community features, such as walkability, proximity to services, and public transit, are more important to Coloradans who live in denser metropolitan areas, whereas rural Coloradans would trade those conveniences for more space.

- Eighty-seven percent of Coloradans call the quality of the environment, including clean air and water, a top or high priority in deciding where to live. Large majorities feel the same way about having easy access to healthy foods (79 percent) and having green space, parks, and recreation areas (64 percent).
- Walkability, access to public transportation, and proximity to shopping, entertainment, and health care are top priorities for fewer Coloradans overall but are significant factors for those in larger cities, such as Denver, for Latinos in the state, and for Coloradans with lower incomes.
- Seventy-nine percent of rural Coloradans call having a lot of space between themselves and their neighbors a top or high priority.

Low-Income Coloradans

For the purposes of this report, low-income Coloradans are defined as those earning at or below 200 percent of the federal poverty level for 2014. That income level varies by household size from \$24,000 for an individual to \$47,700 for a family of four. The *Colorado in 2015* sample included 183 low-income households.

This survey finds many differences between low-income Coloradans and those with higher incomes. Demographically, low-income Coloradans are more likely to be younger and more likely to be Latino. Low-income residents are less likely to live in a single-family home and less likely to be homeowners. They are more likely to move in the next five years and more likely to say they need more space in their next home.

Many low-income Coloradans find the neighborhoods where they live lacking in important ways. They are less satisfied with the quality of life in their communities and with the range of housing available to them, more likely to say that their neighborhood lacks outdoor recreation space, and more likely to say that crime and traffic make it unsafe to walk.

Low-income Coloradans place a higher priority on public transportation and are more likely to want to live in an area where they do not have to depend on a car.

Looking to the future, low-income Coloradans are less optimistic than other income groups. They are less confident they will be able to afford their housing and less likely to say that owning a home is a good investment.

In some analyses, rather than compare low-income households with households not considered low income, we present the data disaggregated simply by income categories.



Source: U.S. Department of Health and Human Services.

Low-Income Status

All Coloradans, analyzed by major group

	Percentage considered low income
All adults	26
Ethnicity	
White	22
Latino	41
Generation	
Millennials	33
Gen Xers	20
Baby boomers	22
War/silent	30
Income	
<\$25,000	89
\$25,000–\$50,000	32
\$50,000–\$75,000	2
>\$75,000	—
Colorado region	
West	30
Southeast	29
North	28
Adams/Arapahoe	28
Western suburbs	22
Denver County	19
Homeownership	
Own	15
Rent	48
Movers	
Very/somewhat likely	31

Stop me when I come to the category in which your total HOUSEHOLD income fell before taxes last year. Your best estimate is fine. Less than \$25,000; \$25,000 up to \$50,000; \$50,000 up to \$75,000; \$75,000 up to \$100,000; \$100,000 or more.

BARRIERS TO HEALTHY LIVING

Community Design and Health

For many Coloradans, neighborhoods are not living up to the healthy community ideal. Although half report that it is simply too far to walk to reach such services as shopping and entertainment, certain subgroups face bigger hurdles. Low-income and Latino people in the state are more likely than others to report that their communities lack adequate green space and bike lanes, and that traffic or crime makes it unsafe to walk or bike.

- Fifty-two percent of Coloradans say it is too far to walk to shopping and entertainment in their communities. As expected, that is especially true for those in rural areas and for older Coloradans.
- Latinos are more likely than whites to live in communities that lack adequate bike lanes and outdoor recreation space and easy access to healthy foods. They also say they are less likely to walk or bike because their days are too hectic, and their neighborhoods are unsafe because of traffic.

72%
of Coloradans
would rather live in
neighborhoods with
a mix of cultural
backgrounds than
more homogeneous
communities.

WHAT COLORADANS WANT

Car Use, Diversity, and Location

Like Americans as a whole, Coloradans are drawn to areas with diversity in both age and cultural background. Half of Coloradans like the idea of a “car-optional” lifestyle, particularly those who already live in urban areas. Although Coloradans are just as likely as other Americans to want to live in a rural area or small town, they are less likely to currently live in those types of communities, leaving a significant number of Coloradans residing in the suburbs when they would prefer to live elsewhere.

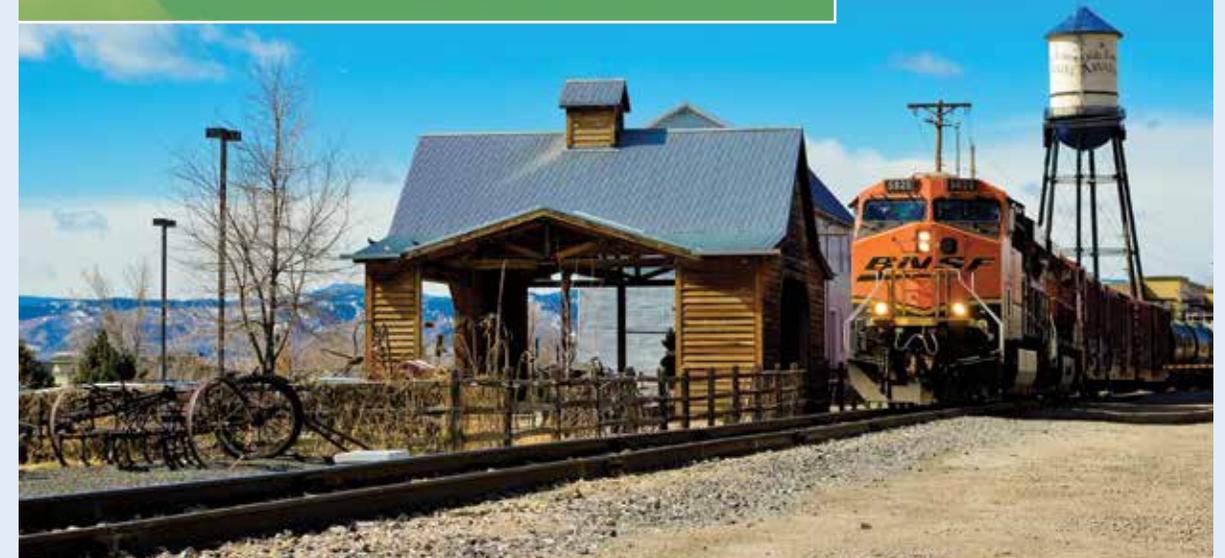
- More than seven in ten Coloradans would rather live in neighborhoods with a mix of ages (77 percent) and cultural backgrounds (72 percent) over more homogeneous communities.
- Fifty-two percent of Coloradans are drawn to areas where they would have less dependence on a car. That is especially true of Latinos, low-income Coloradans, and those living in cities.
- Although four in ten would choose to live in a rural area or small town if they could live anywhere in the next five years, only 29 percent currently do. Conversely, 32 percent of Coloradans currently live in suburban areas, compared with just 22 percent who would choose to live in that type of community if they could move anywhere. That gap is widest among gen Xers and baby boomers.

WHERE COLORADANS LIVE

Housing Choices and Outlook

Most Coloradans own single-family homes or aspire to buy one. Half of Coloradans are at least somewhat likely to move in the next five years. Although most would prefer to remain in a single-family home, one

FOUR IN TEN COLORADANS WOULD
CHOOSE TO LIVE IN A RURAL AREA IN FIVE
YEARS, THOUGH ONLY 29% CURRENTLY DO.



important distinction between Coloradans and Americans overall is that Coloradans are more likely to be looking to downsize or to stay in a home of a similar size, rather than to be looking for a bigger home. Most Coloradans are confident that they will be able to afford their housing choices, although older Coloradans and those with low incomes are more concerned.

- Twenty-nine percent of Coloradans are very likely to move, and another 21 percent are somewhat likely to move, in the next five years. Millennials are the most likely to move, with 70 percent saying a move is somewhat or very likely in the next five years.
- Although just 23 percent of Americans who are likely to move are looking for a smaller home, 32 percent of Colorado movers are interested in downsizing. Three in ten Colorado movers are looking for a larger home, compared with four in ten Americans overall.
- Eighty-five percent of Coloradans are somewhat or very confident that they will be able to afford their housing in the next five years. Although majorities of all subgroups feel that way, a sizable number of the war/silent generation (22 percent) and low-income Coloradans (24 percent) are not at all or not very confident.

For both the national and Colorado surveys, ULI worked with Belden Russonello Strategists LLC. Additional materials are available at www.uli.org/communitysurvey.

COLORADO COMMUNITIES

Community Types and Regions

Survey respondents were asked to characterize their current residence into one of six location subtypes, ranging from rural area to big city. Responses reflect individuals' opinions about where they live and do not necessarily correspond to places as defined by the U.S. Census Bureau. In Colorado, that meant that most, but not all, of those who selected "big city" are from the greater Denver area, both Denver County itself as well as some in the surrounding counties. The next largest concentration of those who classify their area as a "big city" is in Colorado Springs.

For *Colorado in 2015*, we also analyzed responses by region. Regions were defined as including the counties shown in figure 1.

Community Types

Rural residents own primarily single-family homes. Public transit and walkability are low priorities, and having a lot of space between neighbors is a very high priority.

Small-town residents tend to have lower incomes than other community types. These residents are somewhat more likely to be dissatisfied with the range of housing options available. Small towns feature the highest number of Latinos.

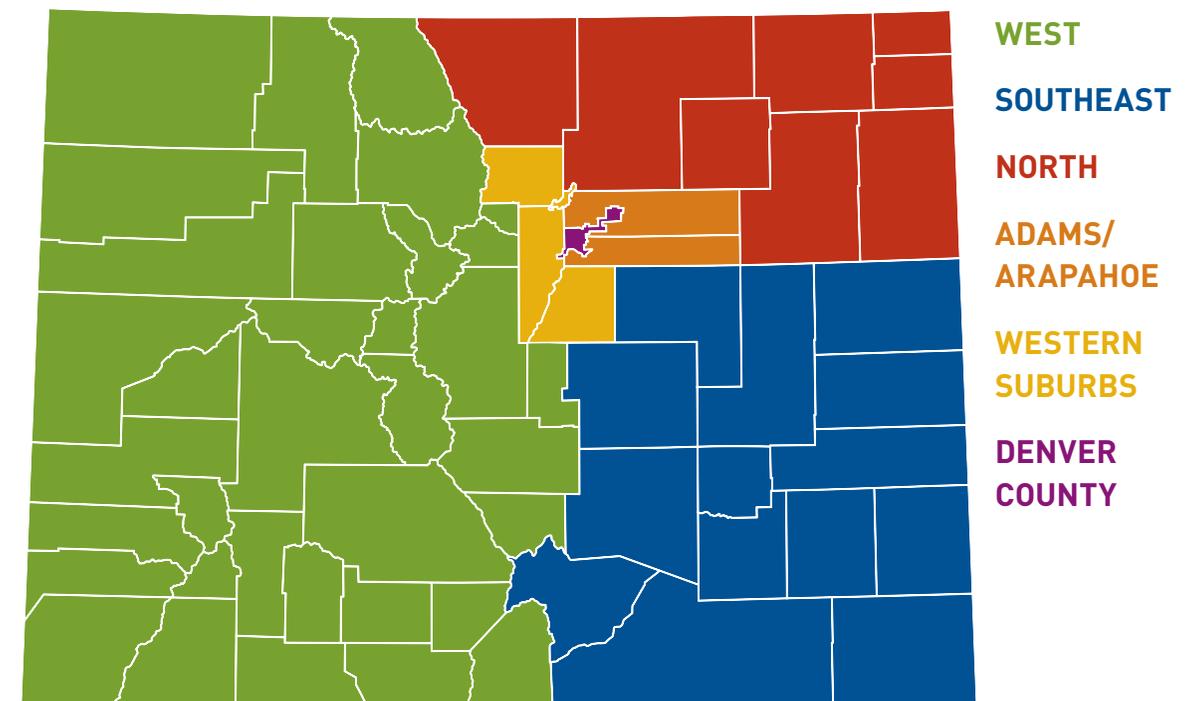
Suburban residents have higher incomes, but they are somewhat more likely to be dissatisfied with the range of available housing options. Suburban residents who expect to move are more likely to be looking for homes that are smaller than their current ones.

Residents of medium-sized cities are more likely than others to plan to move in the next five years. They are the most likely to prefer a community where a car is not a necessity and are also more likely to show concern for the lack of bike lanes in their communities.

Big-city residents prioritize public transit, walkability, and proximity to services more highly than others. They are more likely than others to say that their neighborhoods lack green space. Big cities also have the highest rate of renters and apartment dwellers.

FIGURE 1

Colorado Regions



A full list of counties in each region can be found on page 32.

Colorado Regions

The **West** is characterized by mostly rural or small-town living; proximity to services and public transit is not a priority. These Coloradans want to be in rural areas and are willing to trade convenience for more space. This area is the least racially diverse and the least likely to want racial diversity; however, the western residents are more likely than Coloradans in other regions to want to live among a diversity of ages.

The **Southeast** has the highest rate of Latinos as well as the highest rate of single-family homes. A plurality live in medium-sized cities in this region. Public transit is a low priority.

The **North** is made up mostly of residents of medium-sized cities and small towns. Again, public transit is a low priority, but those living in this region are the most likely to express a desire for more bike lanes. Residents of the North who plan to move are more likely than others to be looking for a larger home.

Adams/Arapahoe refers to two fast-growing suburban counties primarily east of Denver. Residents here are more likely than others in the state to be dissatisfied with the quality of their current homes. They are also more likely to be considering a move. They say that green space for recreation is a high priority, but they are also the most likely to agree that their communities don't have it. This region is the most likely to say traffic makes it unsafe to walk.

The **Western suburbs**, as the name implies, are mostly suburban; this area also has the highest rate of baby boomers. They are less likely than others to prioritize cultural diversity in their communities. The residents of this area who are likely to move are more likely than others to be looking to downsize.

Denver County contains a mix of urban and suburban areas. Coloradans living in the county are more likely to prioritize public transit, walkability, and green space for recreation. They are also the most likely to desire a car-optional lifestyle.

HOW COLORADANS FEEL

Satisfaction with Communities and Housing

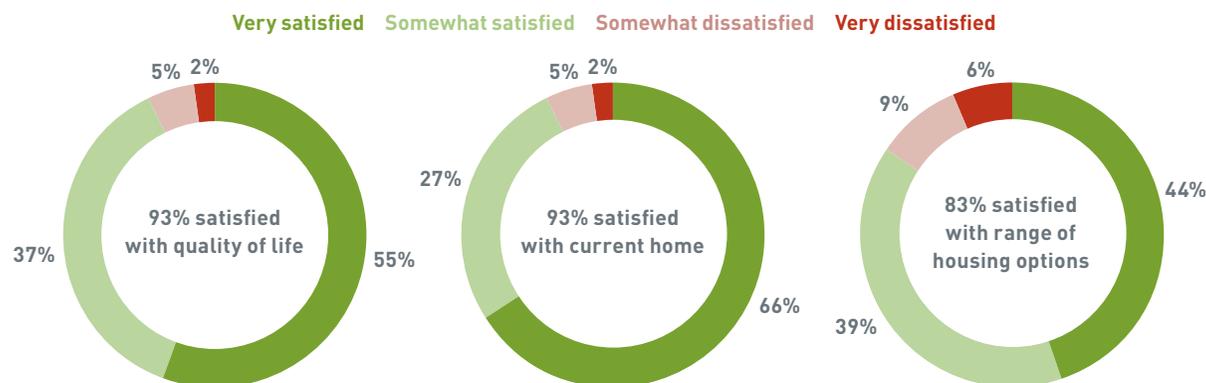
Colorado residents overall express high levels of satisfaction with their communities and the homes in which they live. These expressions of satisfaction are very high for all demographic groups but especially so for homeowners—and they track closely to levels experienced across the country.

Satisfaction with Quality of Life in Community

Ninety-three percent of Colorado residents say they are somewhat or very satisfied with the quality of life in their communities (figure 2). Over half of the state’s residents (55 percent) say they are very satisfied, making Coloradans slightly more likely than Americans overall (49 percent) to be very satisfied. Satisfaction is high in all demographic groups, but it increases with income. Eighty-six percent of those earning less than \$25,000 per year are somewhat or very satisfied with the quality of life in their communities, compared with 96 percent of those earning over \$75,000. Residents of Adams and Arapahoe counties (40 percent) and those of the Southeast region (46 percent) are less likely to be very satisfied with the quality of life in their communities when compared with residents of the rest of the state.

FIGURE 2

Satisfaction in Colorado
Percentage of adults

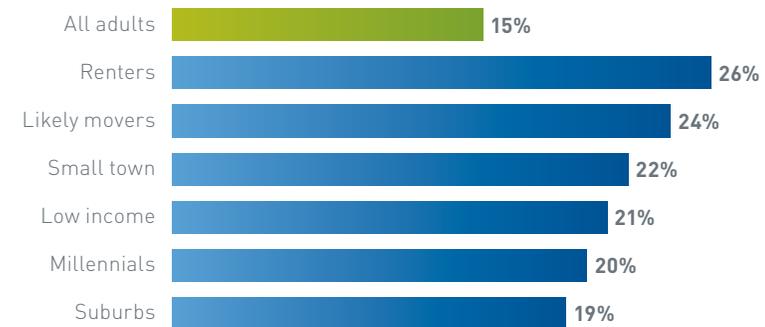


Now I would like you to tell me how satisfied you are with the following. Would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with [the quality of life in your community] [the quality and size of the home you live in currently] [the range of different housing types to choose from in your community]?

FIGURE 3

Dissatisfaction with Range of Housing Options

Percentage of Coloradans who are “somewhat” or “very” dissatisfied—groups most likely to be dissatisfied



Now I would like you to tell me how satisfied you are with each of the following. Would you say you are satisfied or dissatisfied with [the range of different housing types to choose from in your community]?

Satisfaction with Current Home

Coloradans generally express satisfaction when it comes to their current residences. Ninety-three percent of survey respondents overall said they were very or somewhat satisfied with the quality and size of their homes. However, dissimilarities emerge when we look at the 66 percent of residents who are very satisfied with their homes. Here, we find differences between low-income Coloradans (56 percent very satisfied) and Coloradans with higher incomes (69 percent). Also, 72 percent of rural and small-town residents are very satisfied, compared with 61 percent of suburbanites. Age once again is a factor: 60 percent of millennials—but 77 percent of the war/silent generation—report being very satisfied with their current homes.

Although few Coloradans say they are dissatisfied with their current homes, residents of Adams and Arapahoe counties are twice as likely to express dissatisfaction (14 percent) as other Coloradans (7 percent overall).

Satisfaction with Range of Housing Options

Among the three satisfaction questions, Coloradans are least likely to be satisfied with the housing options in their community, although satisfaction here is very high as well. Eighty-three percent are satisfied, and 15 percent are dissatisfied, with the range of housing types to choose from.

As shown in figure 3, dissatisfaction is higher among renters (26 percent), those who are likely to move (24 percent), those with low incomes (21 percent), and millennials (20 percent). Residents of small towns (22 percent) and suburbs (19 percent) also reported dissatisfaction with the range of housing options from which they can choose.

26%
of renters are dissatisfied with the range of housing options in their communities.

WHAT COLORADANS VALUE

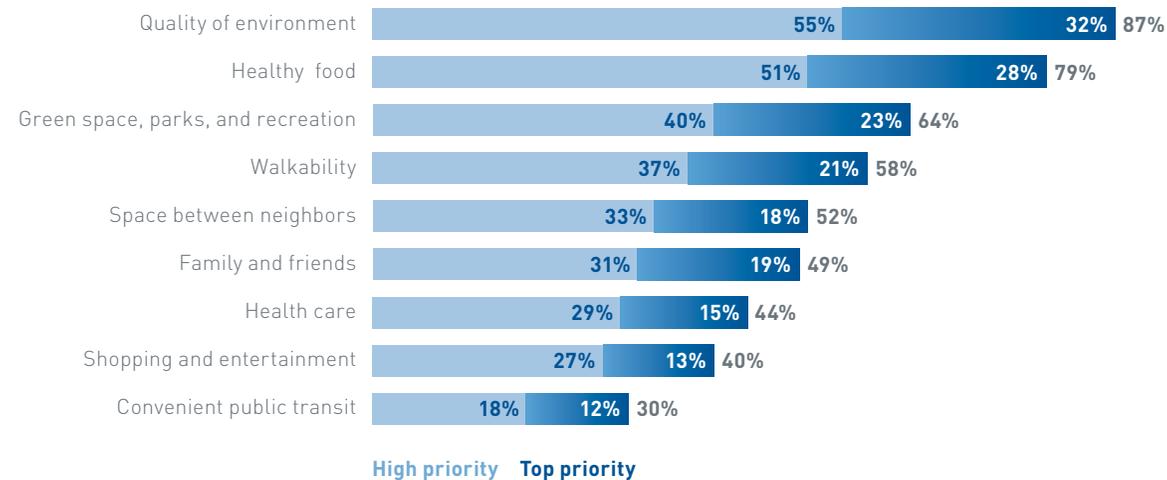
Community Attribute Priorities

The survey asked Coloradans about their priorities when it comes to where they want to live. A healthy environment with clean air and water and access to fresh, healthy food rise to the top of the priority list. As shown in figure 4, those attributes are followed closely by green space and walkability, then having space between neighbors and being close to family and friends. Proximity to health care and proximity to shopping and entertainment destinations are priorities for fewer than half, and access to convenient transit rates as a priority for one-third.

FIGURE 4

Community Attribute Priorities

Percentage of Coloradans rating community attribute as a “top” or “high” priority



Let’s assume for a minute that you were deciding to stay where you are or to move somewhere else in the next five years. I am going to read some characteristics that you would look for in a neighborhood or community. I would like you to tell me if each would be a top priority, a high but not top priority, a middle priority, or a low priority to you personally in deciding where to live. [How convenient public transportation is.] [How walkable it is, with sidewalks, pedestrian crosswalks, and so forth.] [Whether it’s a walk or a short drive to doctors, hospitals, or clinics you use or might need.] [Whether it’s a walk or a short drive to shopping and entertainment.] [The availability of fresh, healthy food in the community.] [Having a lot of space between you and your neighbors.] [The quality of the environment, including air and water quality.] [The amount of green space, parks, and recreation areas.] [How close the community is to your family and friends.]

FIGURE 5

Community Attribute Priorities

Percentage of Coloradans rating community attribute as “top” or “high” priority, analyzed by major groups

	Quality of environment	Healthy food	Green space	Walkability	Space between neighbors	Family and friends	Health care	Shopping and entertainment	Convenient public transit
All adults	87	79	64	58	52	49	44	40	30
Ethnicity									
White	88	79	65	57	51	51	42	38	27
Latino	81	75	60	63	49	46	45	44	40
Generation									
Millennials	90	85	71	66	47	45	41	40	32
Gen Xers	82	75	62	50	58	48	38	32	24
Baby boomers	88	78	63	53	56	51	46	40	27
War/silent	86	74	54	64	40	59	57	54	37
Income									
<\$25,000	81	74	63	62	49	47	51	47	42
\$25,000–\$50,000	88	80	57	57	40	49	46	38	32
\$50,000–\$75,000	93	82	68	56	53	54	42	37	16
>\$75,000	88	77	69	58	58	50	36	39	26
Colorado region									
West	91	74	54	47	63	56	39	26	21
Southeast	92	79	54	51	63	51	41	41	28
North	88	84	61	62	54	51	45	32	23
Adams/Arapahoe	84	79	69	60	58	44	47	44	31
Western suburbs	84	80	70	65	43	47	46	46	33
Denver County	86	77	73	63	29	49	42	43	39
Homeownership									
Own	88	77	63	58	55	50	42	37	25
Rent	84	81	65	58	46	48	44	44	37
Movers									
Very/somewhat likely	88	84	68	58	51	45	44	39	30

Let’s assume for a minute that you were deciding to stay where you are or to move somewhere else in the next five years. I am going to read some characteristics that you would look for in a neighborhood or community. I would like you to tell me if each would be a top priority, a high but not top priority, a middle priority, or a low priority to you personally in deciding where to live. [How convenient public transportation is.] [How walkable it is, with sidewalks, pedestrian crosswalks, and so forth.] [Whether it’s a walk or a short drive to doctors, hospitals, or clinics you use or might need.] [Whether it’s a walk or a short drive to shopping and entertainment.] [The availability of fresh, healthy food in the community.] [Having a lot of space between you and your neighbors.] [The quality of the environment, including air and water quality.] [The amount of green space, parks, and recreation areas.] [How close the community is to your family and friends.]

FIGURE 6

Access to Healthy Foods

Percentage of Coloradans indicating “top” or “high” priority, analyzed by generation



Let’s assume for a minute that you were deciding to stay where you are or to move somewhere else in the next five years. I am going to read some characteristics that you would look for in a neighborhood or community. I would like you to tell me if each would be a top priority, a high but not top priority, a middle priority, or a low priority to you personally in deciding where to live. [The availability of fresh, healthy food in the community.]

Healthy Environment and Food

Survey respondents indicated the priority they would place on a variety of community attributes if they were considering a move to a new community. Environmental quality and the availability of fresh, healthy food emerged as key priorities.

The quality of the environment, including air and water quality, is a top or high priority for 87 percent of Colorado residents (it is a top priority for 32 percent and high priority for an additional 55 percent). It is a particularly important element for big-city residents, 43 percent of whom call it a top priority.

Access to fresh, healthy food was ranked a top (28 percent) or high (51 percent) priority for more than three-fourths of Colorado residents. Millennials (85 percent top or high priority) are more likely than older Coloradans to consider this attribute at least a high priority. (See figures 5 and 6.)

Green Space and Walking

The amount of green space and number of parks and recreation areas are central to two-thirds of Coloradans (23 percent top priority and 40 percent high priority). Thirty-eight percent of big-city residents rate these attributes as a top priority, compared with just two in ten in smaller communities. Millennials are also more likely to highly prioritize green space. Seven in ten millennials (71 percent) call it a top or high priority, compared with 64 percent of Coloradans overall.

Over half of Colorado residents call walkable neighborhoods, with sidewalks, crosswalks, and other pedestrian-friendly features, a top or high priority. Walkability is a higher priority for Coloradans than for Americans overall. Fifty percent of Americans call walkability a top or high priority, compared with 58 percent of Coloradans.

79%
of Coloradans
rank fresh, healthy
food as a top or
high priority.

FIGURE 7

Convenient Public Transit

Percentage of Coloradans indicating “top” or “high” priority—groups most likely to prioritize transit



Let’s assume for a minute that you were deciding to stay where you are or to move somewhere else in the next five years. I am going to read some characteristics that you would look for in a neighborhood or community. I would like you to tell me if each would be a top priority, a high but not top priority, a middle priority, or a low priority to you personally in deciding where to live. [How convenient public transportation is.]

Among all Colorado residents, approximately one-fifth (21 percent) view walkability as a top feature, but when broken down by location, big-city residents (33 percent) are much more likely to rate walkability a top priority than rural dwellers (13 percent) and those living in small towns (15 percent), whereas views in the suburbs (20 percent) and medium-sized cities (24 percent) fall in between.

Transit

Thirty percent call public transportation a top or high priority. Although it is a top priority for only 12 percent overall, low-income Coloradans place a higher priority on public transportation—with 42 percent rating it as a top or high priority when thinking about where they want to live. Coloradans living in Denver County (39 percent top or high priority) are also more likely to prioritize access to public transit. Figure 7 shows demographic categories that put a high priority on convenient public transportation.

42%
of low-income
Coloradans say
access to public
transit is a top or
high priority.

BARRIERS TO HEALTHY LIVING

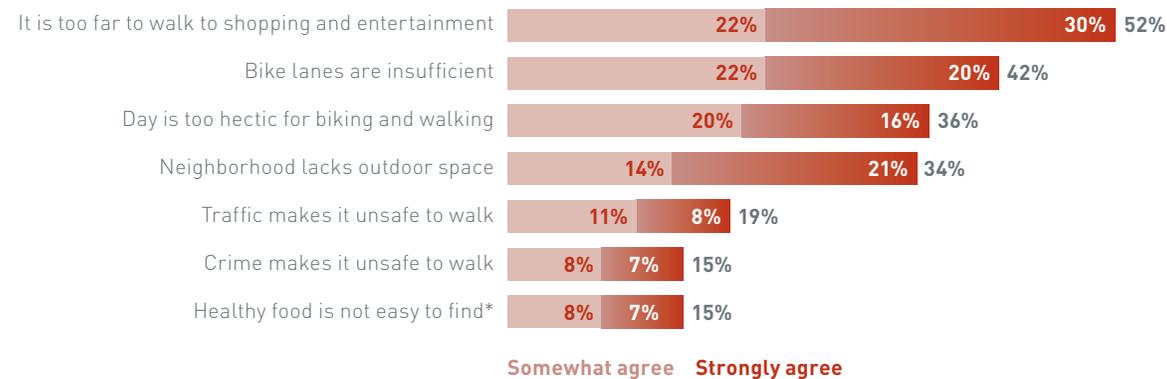
Community Design and Health

Despite the high priority placed on healthy community elements, a significant number of Colorado residents face community design-related barriers to living a healthy lifestyle. Half agree that it is too far to walk from their homes to shopping and entertainment. Four in ten perceive a need for more bike lanes where they live, and one-third say they lack outdoor places for exercise.

Although access to fresh, healthy food and dangers from crime and traffic are not universal concerns, they do disproportionately affect Latinos and low-income Coloradans.

FIGURE 8

Assessment of Health-Related Community Characteristics
Percentage of Coloradans indicating “somewhat” or “strongly” agree



*Question and responses repositioned for consistency with other questions.

Please tell me if you agree or disagree with each of these statements: [My neighborhood lacks convenient outdoor spaces to run, walk, or exercise.] [Crime in my neighborhood makes it unsafe to walk.] [Traffic in my neighborhood makes it unsafe to walk.] [We need more bike lanes in my community.] [In the neighborhood where I live, it is too far for people to walk to shopping and entertainment.] [My day is too hectic to accommodate biking and walking.] [It is easy for me to find fresh, healthy food in my community.] Do you [agree/disagree] strongly or somewhat?

FIGURE 9

Assessment of Health-Related Community Characteristics
Percentage of Coloradans indicating “somewhat” or “strongly” agree, analyzed by major group

	Shopping & entertainment are too far to walk	Bike lanes are insufficient	Day is too hectic	Neighborhood lacks outdoor space	Traffic makes it unsafe to walk	Crime makes it unsafe to walk	Fresh food is not easy to find*
All adults	52	42	36	34	19	15	15
Ethnicity							
White	53	40	32	31	16	13	13
Latino	53	58	56	49	30	20	23
Generation							
Millennials	46	50	41	37	22	16	14
Gen Xers	51	39	36	27	16	9	17
Baby boomers	56	42	31	35	19	18	14
War/silent	60	29	30	37	20	18	16
Income							
<\$25,000	38	54	41	47	28	24	16
\$25,000-\$50,000	58	36	36	37	20	20	12
\$50,000-\$75,000	53	34	34	24	14	10	20
>\$75,000	56	46	34	30	13	6	16
Colorado region							
West	57	33	28	31	13	6	8
Southeast	54	37	38	34	17	18	19
North	51	53	33	36	19	22	18
Adams/Arapahoe	48	44	39	41	24	16	17
Western suburbs	49	36	37	34	18	10	10
Denver County	56	52	36	27	22	19	18
Homeownership							
Own	54	38	33	32	16	12	16
Rent	49	51	41	38	26	21	14
Movers							
Very/somewhat likely	55	47	35	35	22	19	13

*Question and responses repositioned for consistency with other questions.

Please tell me if you agree or disagree with each of these statements: [My neighborhood lacks convenient outdoor spaces to run, walk, or exercise.] [Crime in my neighborhood makes it unsafe to walk.] [Traffic in my neighborhood makes it unsafe to walk.] [We need more bike lanes in my community.] [In the neighborhood where I live, it is too far for people to walk to shopping and entertainment.] [My day is too hectic to accommodate biking and walking.] [It is easy for me to find fresh, healthy food in my community.] Do you [agree/disagree] strongly or somewhat?

FIGURE 10

Neighborhood Lacks Outdoor Space to Exercise

Percentage of Coloradans indicating “somewhat” or “strongly” agree, analyzed by income



Please tell me if you agree or disagree with each of these statements: [My neighborhood lacks convenient outdoor spaces to run, walk, or exercise.] Do you [agree/disagree] strongly or somewhat?

Outdoor Recreation Space

One-third of Colorado residents (34 percent) say that their neighborhood lacks outdoor spaces to run, walk, or exercise, a barrier that varies significantly by income and ethnicity (figures 9 and 10). Overall, 47 percent of Coloradans with incomes of less than \$25,000 say they do not have convenient access to outside exercise space—much more than people with incomes of over \$75,000 per year (30 percent). Half of Latinos (49 percent) feel they do not have access to outdoor space for exercise, compared with one-third (31 percent) of whites.

Barriers to Walking and Biking

Despite the desire to be close to amenities, and the fact that walkability is important to many, walking to services is not a realistic option for many people where they currently live. Half of Colorado residents (52 percent) agree that it is too far to walk to shopping and entertainment in their communities. Although millennials tend to live in places where they can walk, 60 percent of the war/silent generation find themselves in spots that are too far for shopping and finding entertainment on foot.

About one-third of Coloradans (36 percent) say that their days are too hectic to accommodate walking and biking. That is especially true for Latinos: more than half (56 percent) say that they do not have time to walk or bike.

Forty-two percent of all Coloradans believe that their communities need more bike lanes. In particular, Latinos (58 percent), residents with incomes of less than \$25,000 (54 percent), and millennials (50 percent) are more likely to think their communities should have more bike lanes, compared with other Coloradans. Residents of the North region of Colorado (53 percent) and Denver County (52 percent) are also more likely to desire more bike lanes.

47%
of Coloradans with incomes below \$25,000 say they do not have convenient access to outside exercise space.

FIGURE 11

More Bike Lanes Are Needed

Percentage of Coloradans indicating “somewhat” or “strongly” agree—groups most likely to agree



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

Despite these issues, Coloradans are more likely than Americans overall to walk or bike regularly. Forty-five percent of Coloradans walk or bike to a destination at least once a week, compared with 39 percent of Americans as a whole. Figure 11 shows demographic categories that are especially likely to agree that more bike lanes are needed in their communities.

Traffic and Crime as Impediments to Walking

Although most Colorado residents report that it is safe to walk where they live, a significant number say their neighborhoods are not safe for pedestrians because of crime or traffic, and those problems disproportionately affect some groups.

One-fifth (19 percent) of Coloradans says that traffic in their communities makes it unsafe to walk. Three in ten Latinos (30 percent) and those with incomes of less than \$25,000 (28 percent) find it unsafe to walk in their neighborhoods because of traffic.

24% OF COLORADANS WITH INCOMES BELOW \$25,000 SAY CRIME MAKES IT UNSAFE TO WALK.

Fifteen percent of residents say that crime makes it unsafe to walk where they reside. This problem is also most pronounced among residents earning less than \$25,000 (24 percent).

Neighborhood crime and traffic are less likely to prevent Coloradans from walking than Americans overall. Twenty-five percent of Americans say that traffic makes it unsafe to walk, compared with 19 percent of Coloradans, and 21 percent of Americans say that crime prevents them from walking in their communities safely, compared with 15 percent of Coloradans.

Access to Healthy Food

Most Colorado residents (85 percent) report living in communities where they can easily find fresh food, but 15 percent say they do not. Latinos (23 percent) are more likely than white Coloradans (13 percent) to say that it is not easy to access fresh, healthy food in their communities.

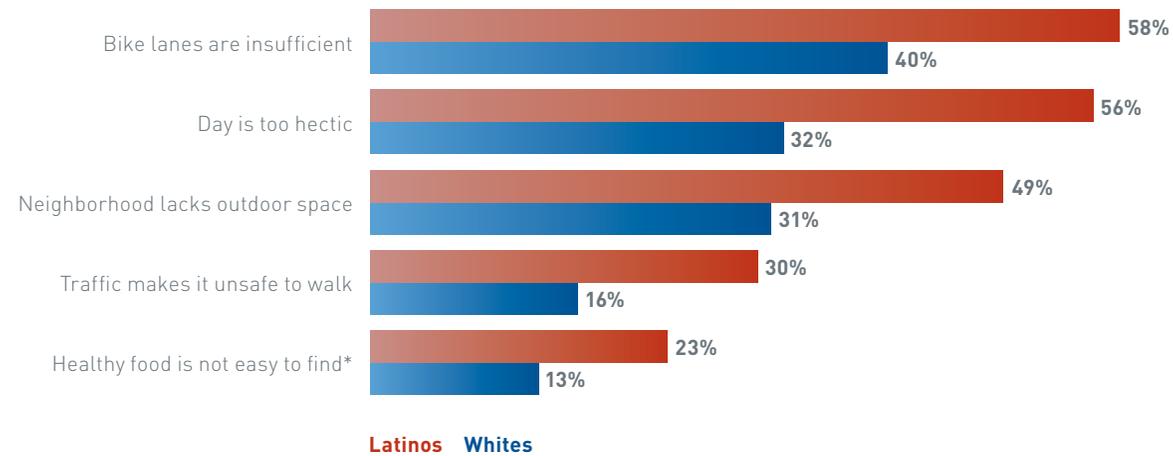
Barriers to Healthy Living for Latinos

Latinos are more likely than white Coloradans to experience many of the barriers to healthy living covered in the survey. Figure 12 shows those categories where there are significant differences between Latinos and whites. As a group, Latinos are more likely than whites to say their communities need more bike lanes (58 percent), lack convenient outdoor space (49 percent), and are unsafe to walk because of traffic (30 percent). They are also more likely to report that their days are too hectic to accommodate walking or biking (56 percent).

FIGURE 12

Assessment of Health-Related Community Characteristics

Percentage of Coloradans indicating "somewhat" or "strongly" agree, analyzed by ethnicity



*Question and responses repositioned for consistency with other questions.

Please tell me if you agree or disagree with each of these statements: [My neighborhood lacks convenient outdoor spaces to run, walk, or exercise.] [Crime in my neighborhood makes it unsafe to walk.] [Traffic in my neighborhood makes it unsafe to walk.] [We need more bike lanes in my community.] [In the neighborhood where I live, it is too far for people to walk to shopping and entertainment.] [My day is too hectic to accommodate biking and walking.] [It is easy for me to find fresh, healthy food in my community.] Do you [agree/disagree] strongly or somewhat?



WHAT COLORADANS WANT

Car Use, Diversity, and Location

52%

of Coloradans would like to live in a place where they seldom need to use a car.

When it comes to where they live, Colorado residents are looking for a mix of elements. Half would like to live in a place where they do not need to use a car very often, a proportion that tracks with the preferences for walkability seen in other sections of this report and that is similar to the views of Americans across the nation. Communities that are diverse in age and culture appeal to a majority of Colorado residents. If they could live anywhere, many Colorado residents would prefer to be in a rural or small-town area.

Car-Optional Living

Fifty-two percent agree that they would like to live in a place where they seldom need to use a car. Less reliance on a car appeals especially to residents of Denver County (75 percent), low-income residents (65 percent), residents of medium-sized and big cities (62 percent and 61 percent, respectively), and Latinos (65 percent). Figure 13 shows demographic groups that are especially likely to prefer a car-optional lifestyle.

FIGURE 13

Preference for Car-Optional Places

Percentage of Coloradans indicating “somewhat” or “strongly” agree—groups most likely to prefer car-optional living



Please tell me if you agree or disagree with each of these statements: [I would like to live in a place where I did not need to use a car very often.] Do you [agree/disagree] strongly or somewhat?

FIGURE 14

Preference for Places with Age and Cultural Diversity

Percentage of Coloradans indicating preference, analyzed by major groups

	Community with people of various ages	Community with people from different cultures/backgrounds
All adults	77	72
Ethnicity		
White	76	69
Latino	78	86
Generation		
Millennials	74	82
Gen Xers	78	76
Baby boomers	84	68
War/silent	70	55
Colorado region		
West	86	63
Southeast	73	76
North	76	69
Adams/Arapahoe	78	77
Western suburbs	72	63
Denver County	78	87

Please tell me if you agree or disagree with each of these statements: [I would rather live in a community where people have a variety of ages] or [I would rather live in a community where most of the people are a similar age]. Do you [agree/disagree] strongly or somewhat? Please tell me if you agree or disagree with each of these statements: [I would rather live in a diverse community where people are from different cultures and backgrounds] or [I would rather live in a community where people are mostly from a similar culture and background]. Do you [agree/disagree] strongly or somewhat?

Age and Cultural Diversity

A large majority of Colorado residents (77 percent) report that they would prefer to live in a community with residents of a variety of ages.

This preference is similar among all demographic groups, although baby boomers are particularly likely to desire a mix of ages (84 percent). (See figure 14.)

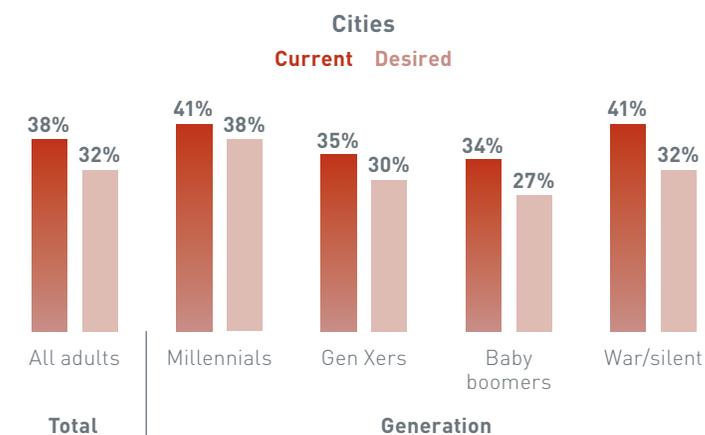
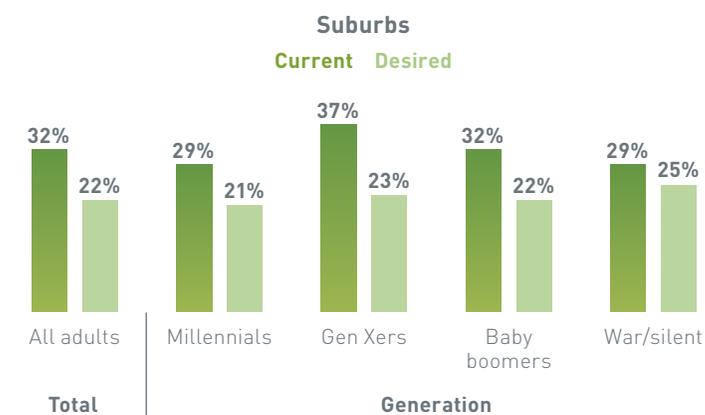
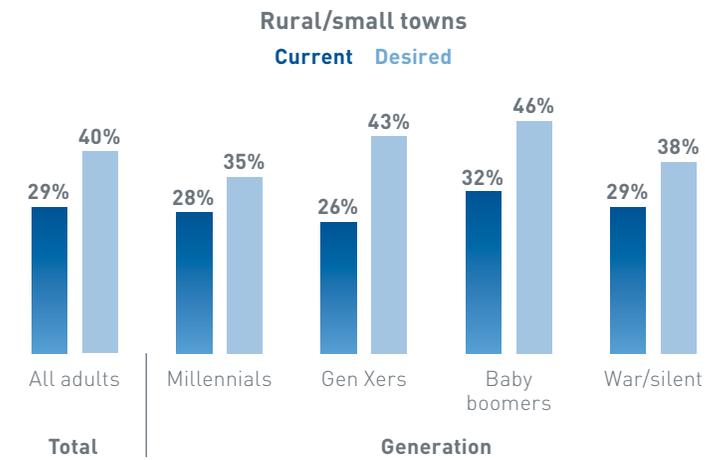
Coloradans (72 percent) are more likely than Americans as a whole (66 percent) to prefer communities with cultural diversity.

The desire for cultural diversity varies across generations and racial and ethnic groups. In Colorado, the desire for such diversity is strongest with the youngest cohort of millennials (82 percent) and declines with each preceding older generation, a finding that is consistent with the national results. Eighty-six percent of Latinos prefer a culturally mixed community, whereas 69 percent of white Coloradans agree. Residents of Denver County are also more likely than others to desire cultural diversity (87 percent).

FIGURE 15

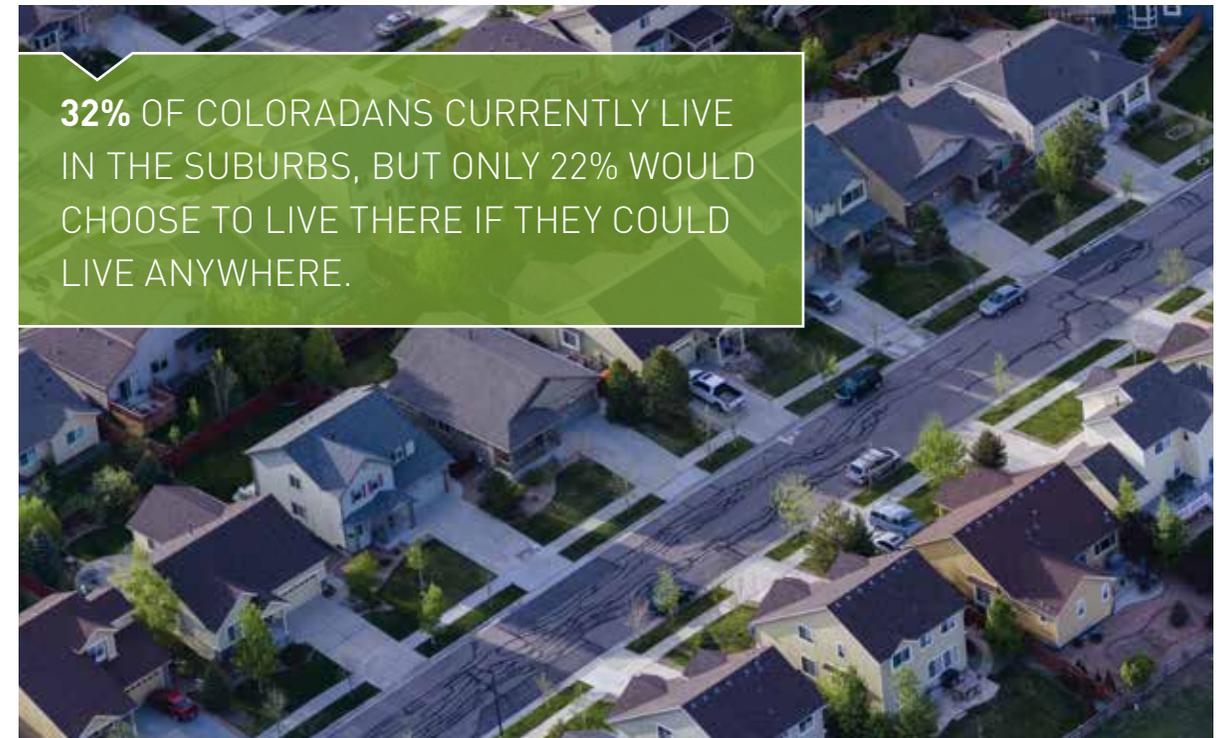
Current and Desired Community

Percentage of Coloradans selecting each community type, analyzed by generation



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

If you could live anywhere in the next five years, would it be a rural area, a small town, a medium-sized city, a big city, a suburb within a 20-minute drive of a city, a suburb farther than a 20-minute drive of a city, or something else?



Location Preferences

Colorado residents live in many different types of communities, but many say they would like to move somewhere else if they had the option. If they could live anywhere, 40 percent say they would live in a rural area (20 percent) or in a small town (20 percent), if they could, compared with 29 percent of Coloradans who live in those areas today. (See figure 15.)

Comparing Coloradans' desires with those of Americans as a whole, we find that similar numbers of Coloradans (40 percent) and Americans overall (42 percent) would choose to live in a rural area or small town if they could. However, fewer Coloradans actually live in those types of communities (29 percent, compared with 37 percent nationally), making the gap between preference and reality wider in Colorado than in the nation overall.

Correspondingly, compared with Americans as a whole, more Coloradans find themselves living in the suburbs (32 percent of Coloradans versus 26 percent of all Americans) even though they would prefer to live somewhere else. Just 22 percent of Coloradans would choose to live in the suburbs if they could move anywhere, compared with 32 percent who actually do live in the suburbs.

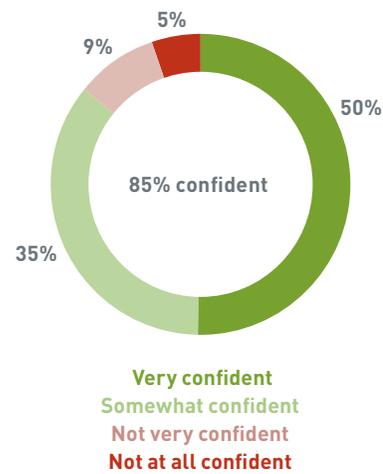
The generations in Colorado also show varying desires, which may reflect their different stages of life. Millennials are more likely than older Coloradans to prefer living in a city (38 percent), whereas gen Xers and baby boomers show the largest preference for rural areas and small towns. Gen Xers and baby boomers are also the most likely to be living in the suburbs, even though many would rather live elsewhere.

40%
of Coloradans would choose to live in a rural area or small town.

WHERE COLORADANS LIVE

Housing Choices and Outlook

FIGURE 16
Confidence in Ability to Afford Desired Home
 Percentage of Coloradans



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

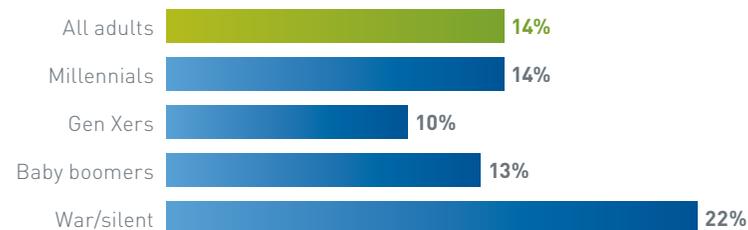
Half of all Coloradans—including seven in ten millennials—report being somewhat or very likely to move in the next five years. Many millennials report a desire to transition into homeownership. As the baby boomers and older Colorado residents age, they prefer to stay in their current homes or to downsize. Most Coloradans are confident they will be able to afford the home they want.

Confidence and Affordability

Most Colorado residents believe they will be able to afford to own or rent the kind of home they want in the next five years, with 85 percent saying they are somewhat or very confident. As shown in figure 16, 50 percent are very confident, and 35 percent are somewhat so, and this confidence is fairly widespread across demographic groups.

However, 14 percent of Coloradans lack confidence in their ability to afford the home they want. Close to one-third (30 percent) of those earning less than \$25,000 per year lack confidence. Nearly a quarter of the war/silent generation (22 percent) report they are not confident, the most of any generation. Figure 17 illustrates the differences in generations when it comes to housing confidence.

FIGURE 17
Lack Confidence in Ability to Afford Desired Home
 Percentage of Coloradans who are “not very” or “not at all” confident, analyzed by generation



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

FIGURE 18

Major Housing Indicators
 Among all Coloradans, analyzed by major group

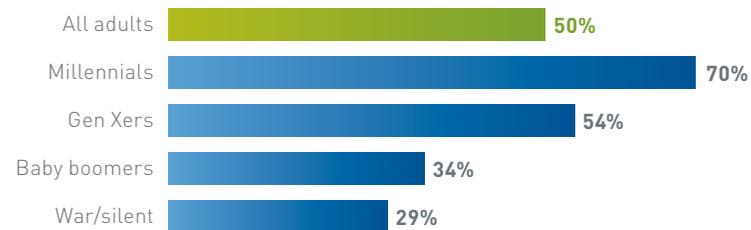
	Very or somewhat likely to move	Lack confidence in ability to afford desired home	Agree homeownership is a good investment	Currently own home (all)	Expect to own home (among movers)
All adults	50	14	76	67	73
Ethnicity					
White	48	13	77	71	74
Latino	49	22	71	57	68
Generation					
Millennials	70	14	75	43	64
Gen Xers	54	10	89	73	89
Baby boomers	34	13	79	81	75
War/silent	29	22	57	81	63
Income					
<\$25,000	55	30	54	36	48
\$25,000–\$50,000	55	11	76	54	74
\$50,000–\$75,000	47	8	84	77	76
>\$75,000	45	9	89	87	89
Colorado region					
West	43	12	77	68	86
Southeast	50	16	74	69	66
North	46	18	76	69	55
Adams/Arapahoe	56	17	75	63	73
Western suburbs	45	11	76	71	75
Denver County	55	8	82	63	81
Homeownership					
Own	35	9	84	100	85
Rent	80	23	63	—	63
Movers					
Very/somewhat likely	100	12	78	48	73

How likely are you to move to a different home—one that is your primary residence—in the next five years? Would you say very likely, somewhat likely, not very likely, or not at all likely? How confident are you that you will be able to afford to own or rent the kind of home that you want in the next five years? Would you say you are very confident, somewhat confident, not very confident, or not at all confident? Which of these pairs do you agree with more? [Buying a home is probably a good investment for me] OR [buying a home is probably not so good of an investment for me]. Do you own or rent your current residence? In five years, do you expect to own or rent your primary residence?

FIGURE 19

Likely to Move

Percentage of Coloradans who are “very likely” or “somewhat likely” to move in five years, analyzed by generation



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

70%
of millennials report that they are very or somewhat likely to move in the next five years.

Likely Movers

Half of Colorado residents report that they are very or somewhat likely to move in the next five years, including 29 percent who say they are very likely. Similar to the national trend, the youngest are the most likely movers. As shown in figures 18 and 19, 70 percent of millennials say they are very or somewhat likely to move within five years, compared with just 29 percent of the oldest cohort of the war/silent generation.

Homeownership

Sixty-seven percent of Coloradans live in homes they own. **Three-fourths (76 percent) say that “buying a home is probably a good investment for me,”** with 21 percent saying that it is probably not such a good investment.

That optimism is reflected in the finding that 73 percent of those anticipating a move envisage being homeowners in the next five years. The expectation of owning is highest among gen-X movers (89 percent). It is also most pronounced among those with the highest incomes (89 percent of Coloradan movers making over \$75,000), and less certain for those movers in lower economic brackets (48 percent of those making less than \$25,000). Movers in the West region (86 percent) and Denver County (81 percent) are more likely than those in other areas to anticipate being homeowners, whereas those in the North are more likely than others to say they will likely be renting (37 percent).

Millennials see themselves transitioning into homeownership as they move into the next phase of their lives, with 64 percent of millennial movers expecting to own a home in the next five years. However, they remain less likely to choose homeownership than gen Xers and the baby boomers in the next five years.

Home Size and Type

Seven in ten (70 percent) of all Coloradans live in single-family detached homes. Those homes are the dominant housing type for Americans as a whole, as well as for most demographic groups and generations. In Colorado, even the youngest respondents report living mostly in single-family detached homes (61 percent of millennials)—although 30 percent of millennials say they are still living with their parents, a common phenomenon across the nation. Single-family detached homes are most common among gen Xers (75 percent) and baby boomers (78 percent). They decline with age, with 68 percent of the war/silent generation in single-family houses. For low-income households, multifamily housing is more common than among other income groups: 25 percent of those earning less than \$25,000 per year and 18 percent of those in the \$25,000–\$50,000 income bracket are living in apartments, and only 45 percent and 59 percent, respectively, are in single-family homes.

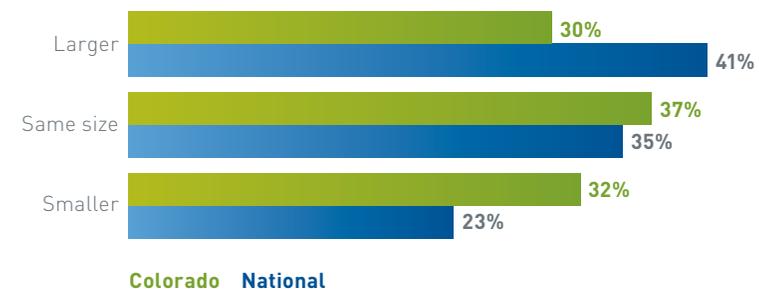
32% OF COLORADANS EXPECT TO DOWNSIZE TO A SMALLER HOME, COMPARED WITH 23% OF AMERICANS AS A WHOLE.

Among likely movers, 30 percent expect their new home to be larger than their current one, 32 percent expect it to be smaller, and 37 percent expect it to be the same size. Gen-X movers are the ones aiming larger (37 percent), whereas many of the movers in the war/silent generation are looking for smaller quarters (50 percent).

FIGURE 20

Preferences for Size of Home

Among adults who are “very likely” or “somewhat likely” to move in five years, Colorado and national comparisons



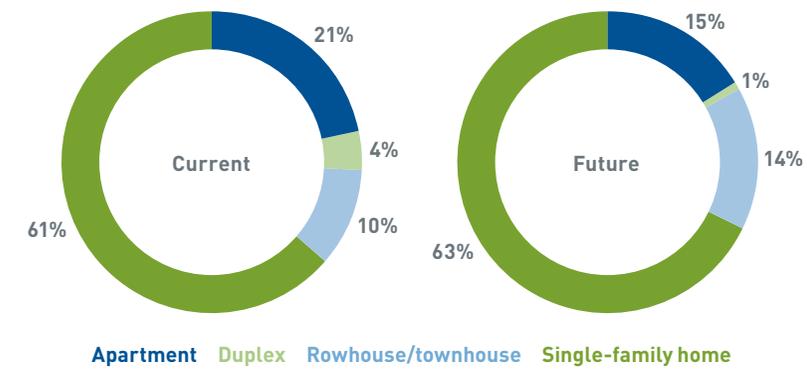
How likely are you to move to a different home—one that is your primary residence—in the next five years? Would you say very likely, somewhat likely, not very likely, or not at all likely? [IF LIKELY TO MOVE] Do you expect that when you move, it will be to a smaller home, a larger one, or something about the same size as you have now?



70% OF ALL COLORADANS LIVE IN SINGLE-FAMILY HOMES, THE MOST DOMINANT HOUSING TYPE FOR AMERICANS AS A WHOLE.

FIGURE 21

Current and Future Housing Type
Among likely movers



Now, I have some questions about your home that is your primary residence. Do you currently live in an apartment building; a duplex; a rowhouse or townhouse; a single-family detached home; or something else? How likely are you to move to a different home—one that is your primary residence—in the next five years? Would you say very likely, somewhat likely, not very likely, or not at all likely? [IF LIKELY TO MOVE] In five years, what type of home do you expect to live in? An apartment building; a duplex; a rowhouse or townhouse; a single-family detached house; or something else?

This is one area where Coloradans diverge from Americans as whole (figure 20). Nationally, movers are much more likely to be looking for a larger home (41 percent) rather than a smaller home (23 percent). In Colorado, movers are just as likely to be looking to downsize (32 percent) as they are to be looking for more space (30 percent).

Although half of Coloradans are at least somewhat likely to move in the next five years, those potential movers are likely to stay in the same housing types in which they currently live. Comparing current housing with expected future housing among likely movers, we find that there is little difference (figure 21). Six in ten Colorado movers live in single-family homes, and a similar percentage of movers plan to live in such houses five years from now (63 percent). Slightly fewer plan to live in apartments than currently do (15 percent and 21 percent, respectively), and slightly more expect to live in rowhouses than currently do (14 percent versus 10 percent).

> ABOUT THE SURVEY

Methodology

The representative telephone survey of 700 adults residing in Colorado was conducted for ULI by Belden Russonello Strategists. The survey was conducted through live interviews on landlines and cellphones from January 22 to February 3, 2015. The data have been weighted by age, race, gender, and region to match the adult population of the state.

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

Belden Russonello Strategists LLC

Belden Russonello Strategists LLC is a nationally recognized survey and communications firm. Since 1982, Belden Russonello Strategists LLC has helped nonprofit organizations, political campaigns, news media, and other clients understand the relationships between issues and motivations for action, whether it is rethinking policy, attracting new members, or changing attitudes and behavior.

Acknowledgments

ULI is grateful to the Colorado Health Foundation for its support of this project.

Colorado Counties by Region

West

Alamosa, Archuleta, Chaffee, Clear Creek, Conejos, Costilla, Custer, Delta, Dolores, Eagle, Fremont, Garfield, Gilpin, Grand, Gunnison, Hinsdale, Jackson, La Plata, Lake, Mesa, Mineral, Moffat, Montezuma, Montrose, Ouray, Park, Pitkin, Rio Blanco, Rio Grande, Routt, Saguache, San Juan, San Miguel, Summit, Teller

Southeast

Baca, Bent, Cheyenne, Crowley, El Paso, Elbert, Huerfano, Kiowa, Kit Carson, Las Animas, Lincoln, Otero, Prowers, Pueblo

North

Larimer, Logan, Morgan, Phillips, Sedgwick, Washington, Weld, Yuma

Adams/Arapahoe

Adams, Arapahoe

Western suburbs

Boulder, Broomfield, Douglas, Jefferson

Denver County

Denver

> **COLORADO IN 2015** shares findings from an opinion survey about housing, community, and transportation in the state. ULI's Building Healthy Places Initiative and Terwilliger Center for Housing partnered with Belden Russonello Strategists LLC to conduct a statistically representative survey of 700 adults living in Colorado. The results of the survey provide an important look at Colorado residents' attitudes toward and expectations regarding a variety of community characteristics.

This research was supported by the Colorado Health Foundation.



The Colorado Health Foundation™

