

Greensboro, North Carolina

November 2017

American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 410 adults, age 18 or older who indicated they were Greensboro residents. The survey was conducted from November 13-20, 2017. The sample was randomly selected from TargetSmart's enhanced voter file. Thirty-seven percent of respondents were reached on wireless phones, twenty-one percent on VOIP phones, and forty-two percent on landlines. Quotas were assigned to reflect the demographic distribution of adult residents in Greensboro, North Carolina. The sample was downweighted to 400 respondents and the data were weighted by gender, age, race from file, and party registration from file to ensure an accurate reflection of the population. The overall margin of error is +/- 4.9%. The margin of error for subgroups is larger and varies. (Percentage totals may not add up precisely due to rounding.)

Executive Summary - Overview

The Greensboro Smart Growth survey echoes many of the findings of NAR's 2017 Community and Transportation Preferences Survey.* Residents are split on what they look for in a neighborhood. A small majority prefer the idea of a walkable community and more alternatives to driving – and this preference is slightly higher in Greensboro than among respondents living in the top 50 metropolitan statistical areas (MSAs). Nonetheless, suburban, driving-intensive living remains highly attractive to a sizeable portion of the community.

Greensboro residents remain conflicted when it comes to determining what is most important in a home. On the one hand, there is an evident desire for the closeness and convenience that come from communities where walking is easy and errand and commute times are short. On the other hand, the majority of residents continue to live in single-family, detached homes and value closeness to the highway as much as they do a walkable community.

In general, people in Greensboro are very satisfied with the quality of life in their community. The vast majority (9 in 10) residents are either *very* or *somewhat satisfied* with their quality of life, with nearly half of all residents saying they are *very satisfied*. These satisfaction numbers are higher than for Americans in the top 50 MSAs, especially when it comes to being very satisfied: 46 percent are very satisfied in Greensboro compared to 37 percent in metropolitan areas throughout the country.

*Comparisons between the two surveys should take into account that the National Survey was conducted online, reaching 3000 adults in the United States' top 50 metropolitan statistical areas. The Greensboro survey was conducted by phone. The differences in mode and sample universe may cause additional differences in responses.

Executive Summary – Where We Live and Priorities

Residents are highly satisfied with life in Greensboro, but see areas for improvement. As in the national survey, the majority of Greensboro residents live in the suburbs and in detached homes, with parks and buses within easy walking distance. However, Greensboro residents are less likely to have sidewalks nearby, and building them is a higher priority than it is for national respondents.

- Nearly two-thirds agree they live in at least somewhat walkable communities – similar to the national survey, although Greensboro residents are more likely to “strongly agree” that their community is walkable. Building more such communities, however, is not a high priority for residents.
- Millennials are more likely to live in at least somewhat walkable neighborhoods, and are more likely to have sidewalks, buses, and parks nearby. Older residents, on the other hand, are more likely to have bike lanes and paths near their homes.
- The more walkable the community, the more satisfied residents are with their quality of life.
- Maintaining and repairing roads and highways is by far the top priority both for Greensboro residents and nationally. Building more sidewalks (59 percent high priority), as well as expanding public transportation and providing more transportation alternatives are higher priorities for Greensboro residents than national respondents – these latter two priorities, as well as building more roads to alleviate traffic congestion, are especially high among non-white Greensboro residents.

Executive Summary – Deciding Where to Live

Seven key traits for deciding where to live were tested: walkability (sidewalks and nearness to shops), commute length and closeness to the highway, access to public transportation, and access to bike paths (generic and separated paths). Walkability, a short commute, and proximity to the highway are top priorities – over eight-in-ten residents say those qualities are very or somewhat important in deciding where to live. Access to buses and bike paths are secondary.

- While Greensboro residents echo the national results in their top priorities, certain elements are much more important to them. Two-thirds say that sidewalks and places to take walks are VERY important in deciding where to live, compared to half of national respondents. Being close to the highway and within a short commute to work is also very important to over half of Greensboro residents.
- Millennials and Gen Xers are much more likely than older generations to prioritize walkability and a short commute to work, with at least half of Millennials describing those characteristics as VERY important in determining where to live.
- Income is also a key determinant in prioritizing these traits. Access to city or regional buses is much more important to those earning under \$50,000 (52 percent VERY important) compared to those earning more than \$50,000 (19 percent). Walkability is also more important to those with lower incomes. In contrast, length of commute is very important no matter the income, with those with the highest incomes prioritizing it the most.
- Those with kids living at home are much more likely to value a short commute (69 percent very important) and walkable community (60 percent very important) than those with no kids at home.

Executive Summary – Ideal Community

Overall residents in Greensboro show somewhat more of a preference for living in a walkable community in homes with a smaller yards (54 percent) versus a suburban community with larger yards (41 percent) than in the national survey. However, both locally and nationally, clear divides appear by generation and the presence of children at home. Moreover, adding in the element of a short commute and attached house appears to change the calculation for these groups.

- Older Greensboro residents (Gen Xers and Boomers) are more likely to prefer living in a home with a smaller yard and more walkable community, while Millennials are split in their preference between such a community and one with larger yards and more driving.
- When a shorter commute is included (even if it means living in an attached house), the preferences switch. Millennials are more likely to prefer the short commute and walkable community, while the older generations prefer the detached, single-family house with a larger yard and longer commute.
- Those with children living at home prefer living in a detached home with a large yard even with more driving and longer commute. However, those families are split in their choice if the smaller yard and the walkable community is not tied to living in an attached home. In both cases, women prefer walkable communities, even if it means a smaller yard or attached home, while men are split.
- Combining the examples above, **thirty-three percent always prefer the walkable community and short commute**, no matter the caveats. Those respondents are more likely to be non-college or older women, or those with lower incomes. **Twenty-five percent of respondents always prefer homes with bigger yards and more driving.** Those respondents tend to be registered Republicans, have higher incomes, and are in the 35-49 age range, especially men. **The remaining 42 percent are inconsistent:** these respondents are more likely to be men over age 50 or in the 50 to 64 age range. They are also more likely to live in City Council District 1.

Executive Summary – Transportation

Greensboro residents' feelings about daily travel are mostly consistent with national attitudes. Most residents say they like walking as well as driving (over 80 percent), but a bare majority say that they drive because they do not have other options.

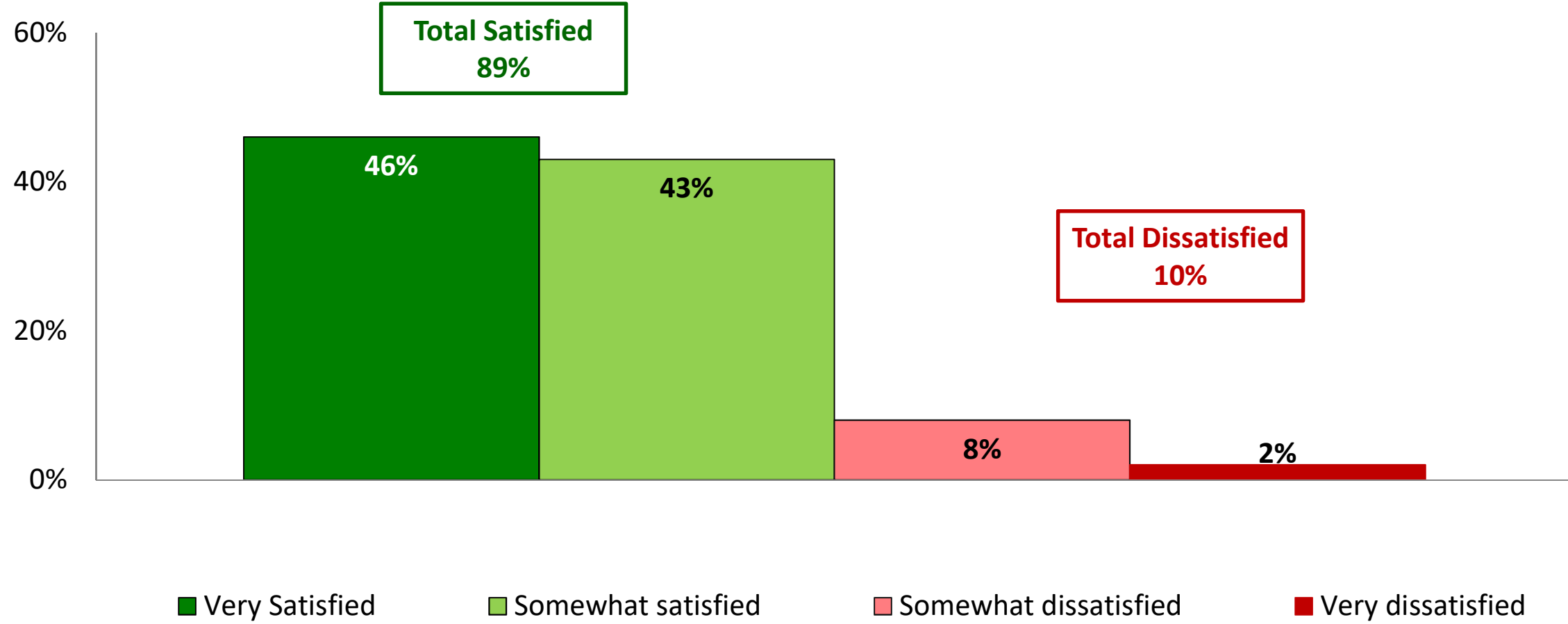
- Maintaining roads, bridges, and highways remains residents' overwhelming priority for the government, but majorities are interested in providing and expanding on transportation alternatives as well as building more roads to alleviate traffic.
- Most residents like driving (83 percent) and walking (82 percent), while about half say they like riding a bike. Just under a quarter (23 percent) say they like taking the city or regional bus – less than the 38 percent who like taking public transport nationally. Younger generations in Greensboro like driving as much or more than older ones do – a difference from the national survey – and do not show a greater preference for taking public transport. However, as in the national survey, younger generations do like riding bikes more than older generations.
- Six-in-ten Greensboro residents travel to work or school with nearly all (93 percent) getting to their destination by private vehicle. Just 4 percent walk or bike, and 3 percent take the bus.
- Overall, only 13 percent of Greensboro residents had used public transportation in the past month, but convenience was not the determining factor: among those who did NOT take transit, a majority said that it was convenient and available to them. All proposed improvements merit positive responses from residents, with six-in-ten saying those changes would make them more likely to use local bus services. Among lower income residents, the most significant improvements would be more reliable, faster, lower costs, and safer service.

Current Living Environment

Nearly 9-in-10 Greensboro Residents Are Satisfied With Their Quality of Life

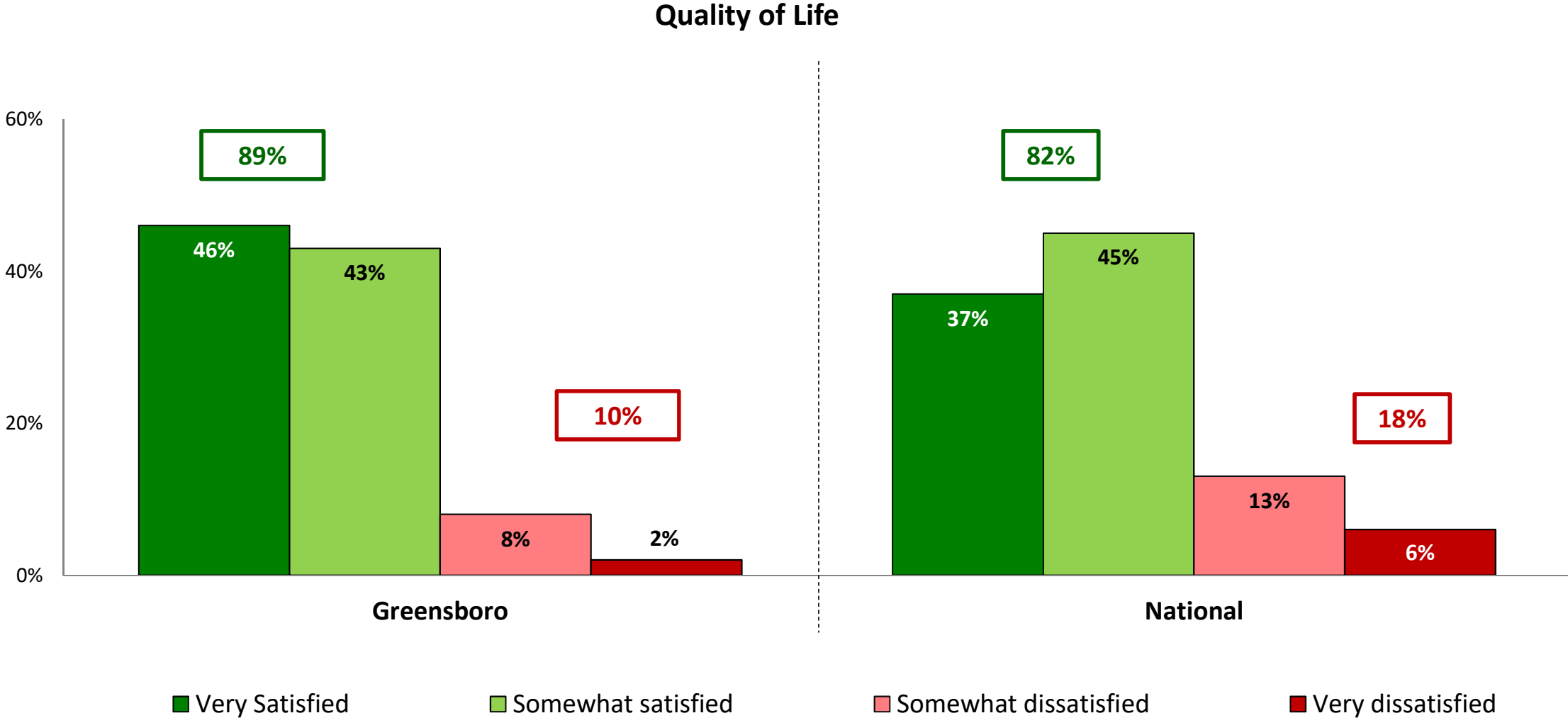
A plurality are VERY satisfied

Quality of Life In Greensboro



Q.3 My first question is about the quality of life in Greensboro. Would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the quality of life in Greensboro?

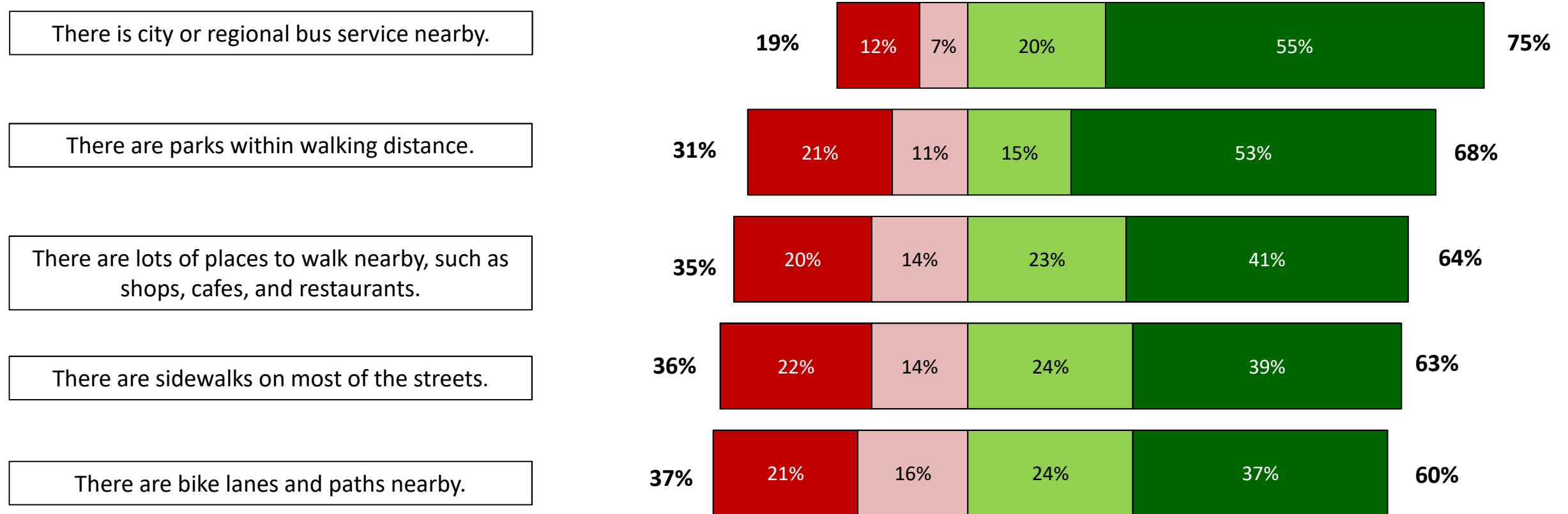
Greensboro Residents are More Likely to be VERY Satisfied with their Quality of Life than Americans in the Top 50 MSAs



Q.3 My first question is about the quality of life in Greensboro. Would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the quality of life in Greensboro?

Most in Greensboro Have Bus Service and Parks Nearby, But Somewhat Fewer Live in Walkable Neighborhoods, Have Sidewalks on Most Streets and Bike Paths Nearby

Descriptors of Your Neighborhood and Home

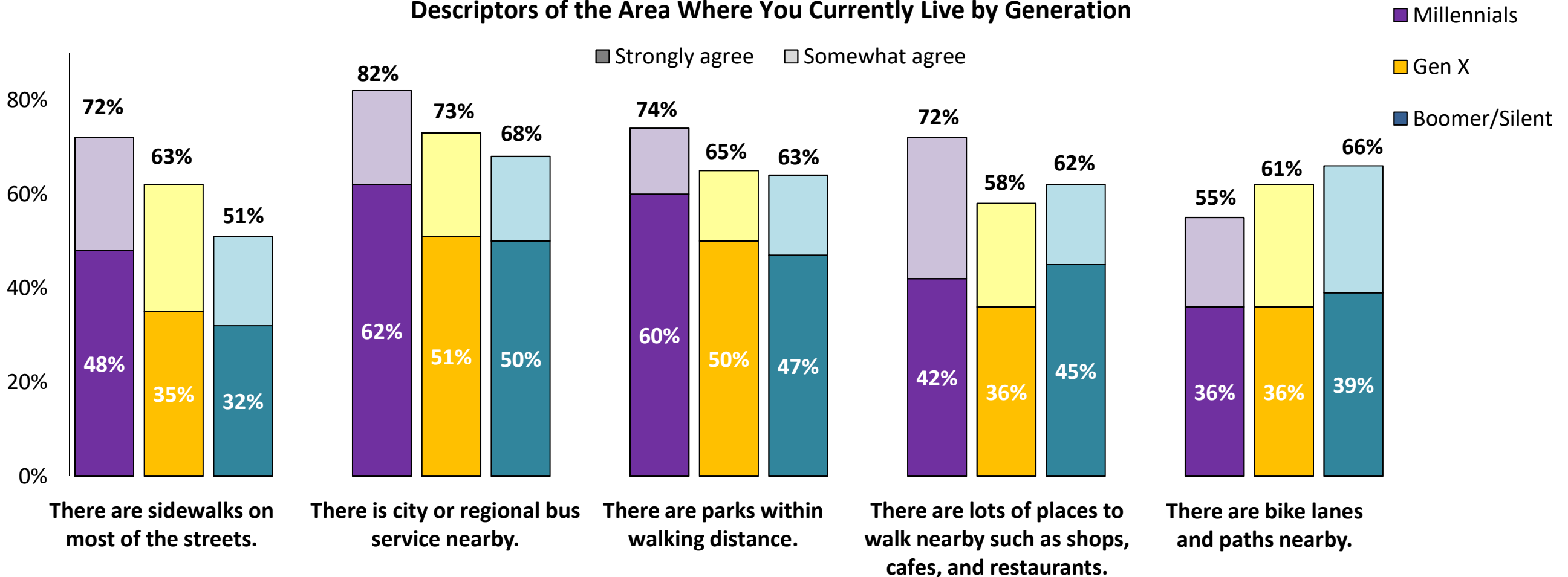


■ Strongly disagree
 ■ Somewhat disagree
 ■ Somewhat agree
 ■ Strongly agree

Younger Generations in Greensboro More Likely to Live in Walkable Communities, with Sidewalks, Parks, and Public Transit Nearby

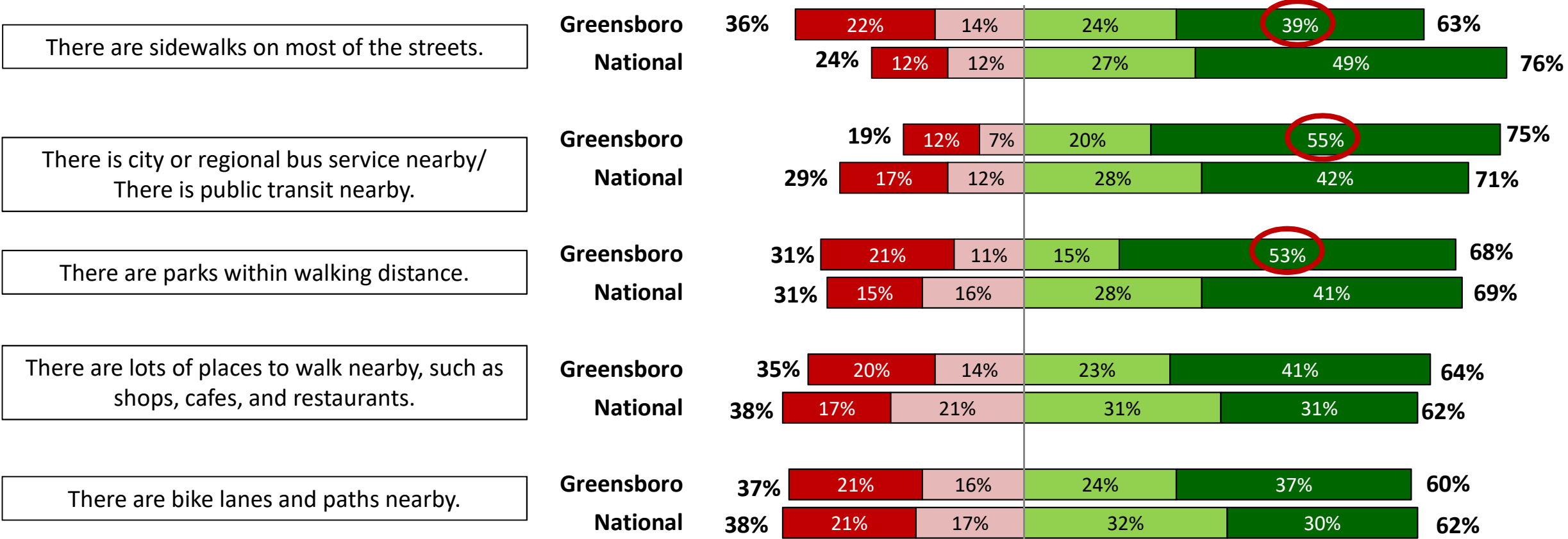
Older residents more likely to live near bike paths

Descriptors of the Area Where You Currently Live by Generation



Greensboro Residents Have Less Access to Sidewalks on Most Streets Than Americans in Top 50 MSAs, But More Access to Bus Service and Parks

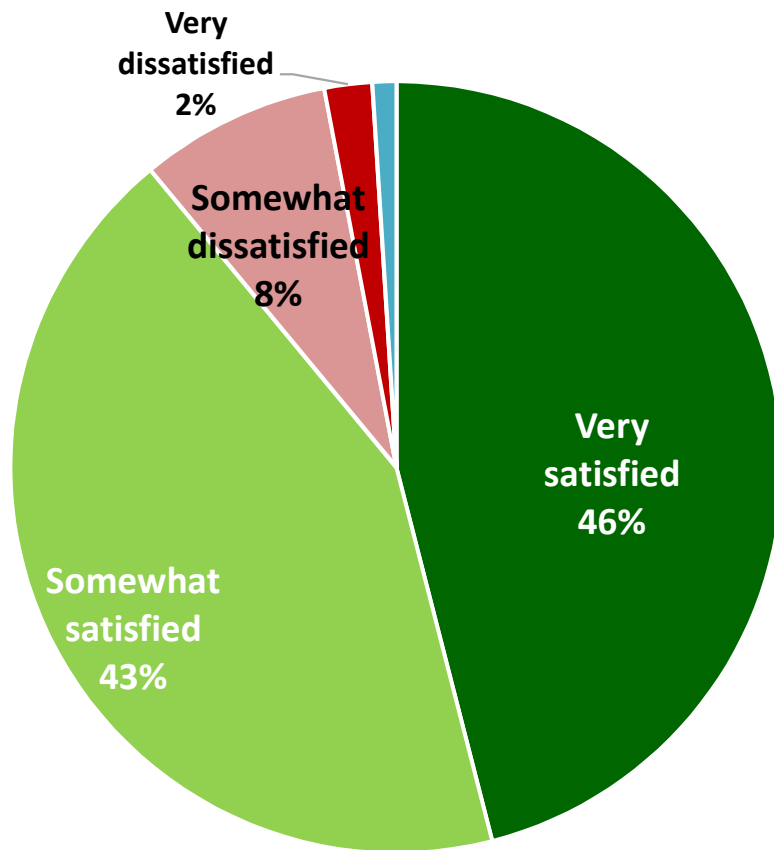
Descriptors of Your Neighborhood and Home



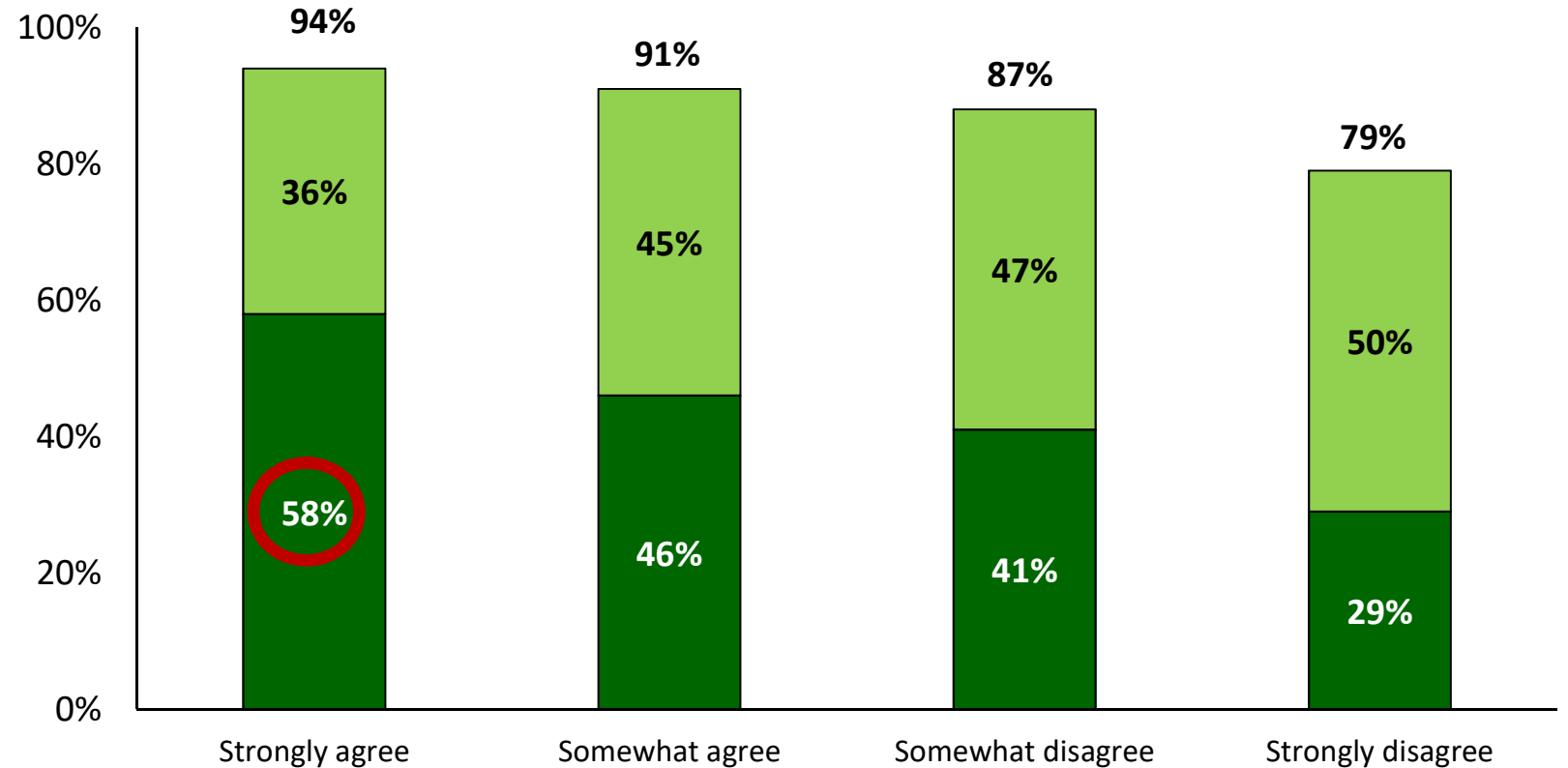
■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree

People with Places to Walk are More Satisfied with the Quality of Life in their Community

Quality of Life In Greensboro



Quality of Life by Agreement that Neighborhood is Walkable



There are lots of places to walk nearby such as shops, cafes, and restaurants.

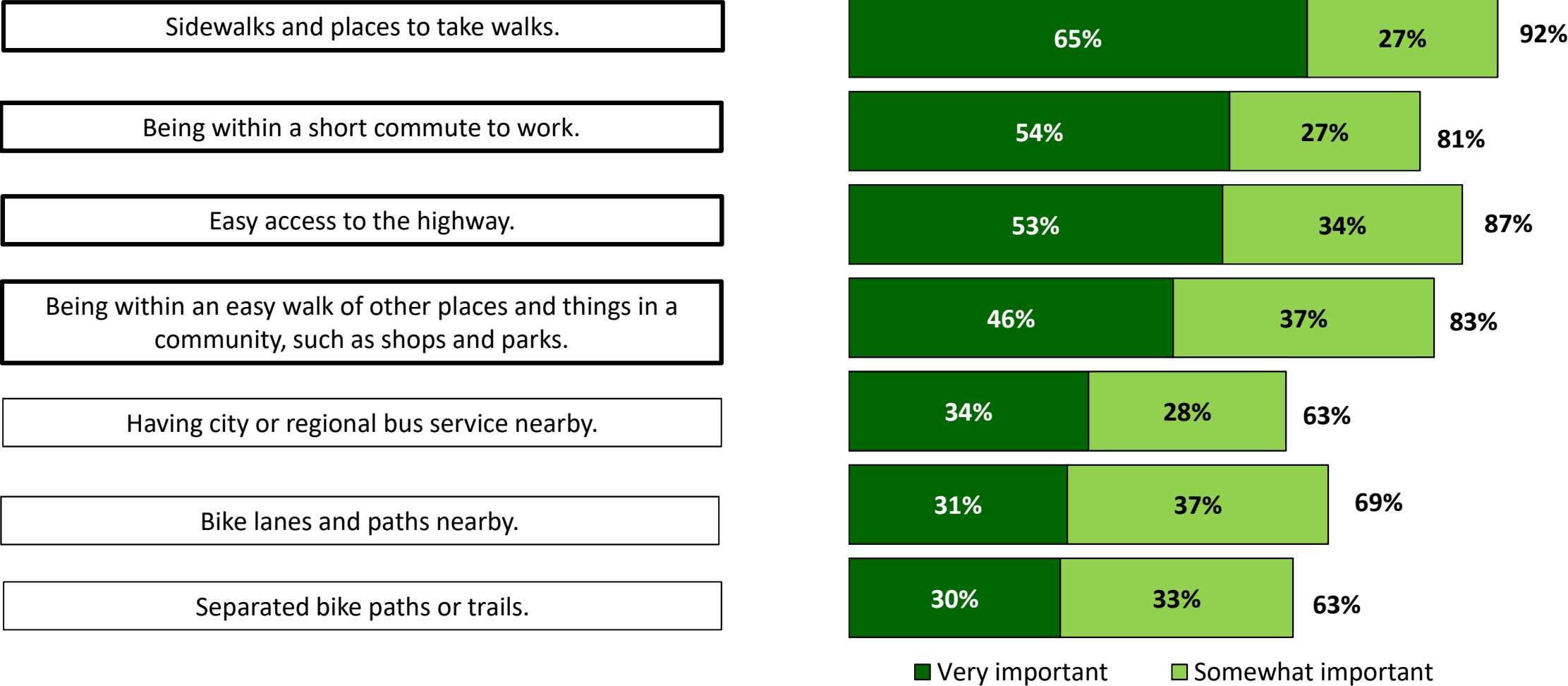
■ Very satisfied ■ Somewhat satisfied

What's Important in Deciding Where to Live

Walkability and Short Work Commute Most Important in Deciding Where to Live

Access to the highway is much more important than access to public transit or bike lanes

Most Important Factors in Deciding Where to Live:

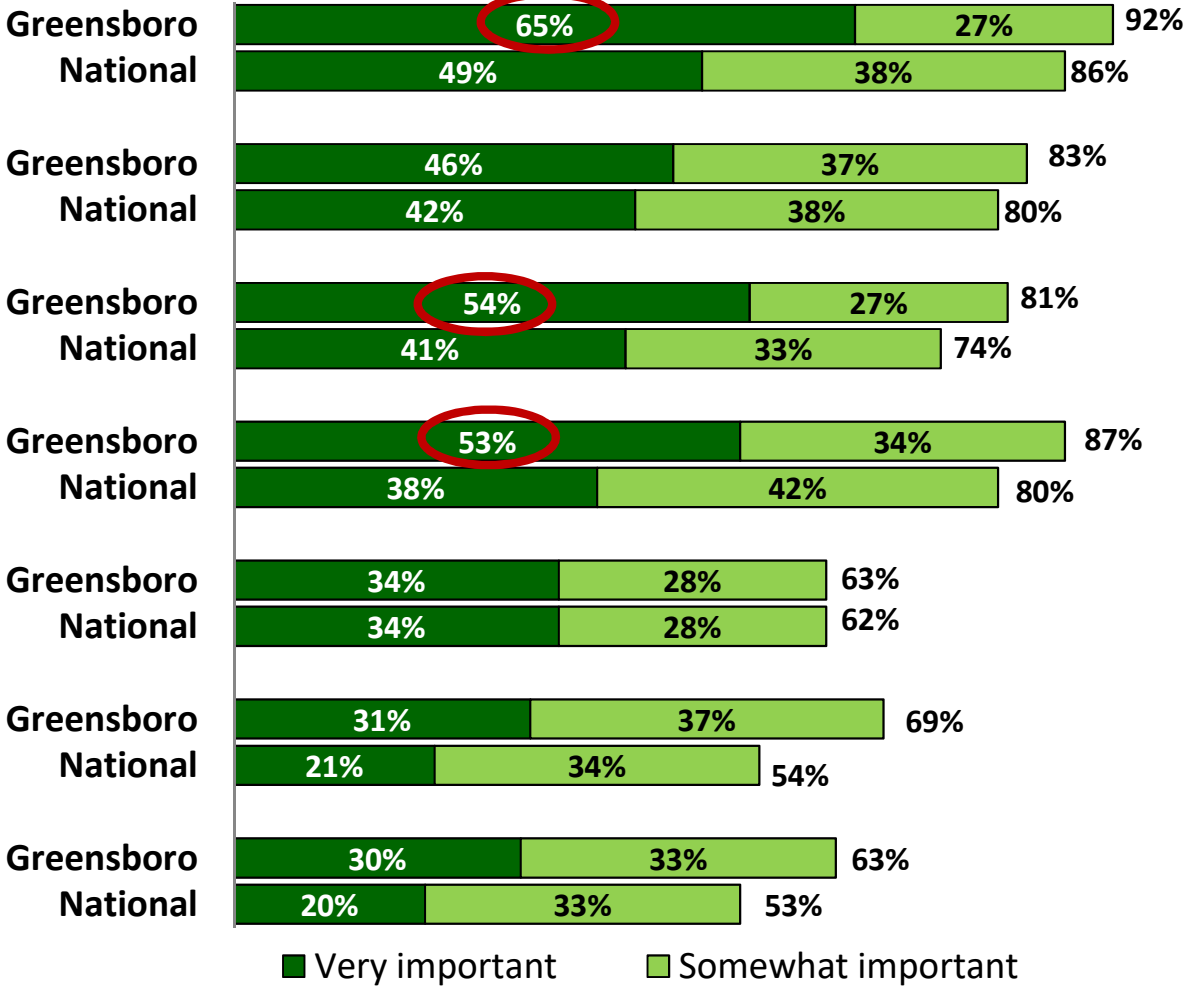


Q.6 Now I am going to read you a list of things about communities in general. For each one, please tell me how important each of the following would be to you in deciding where to live. Would it be very important, somewhat important, not very important, or not at all important to you?

Greensboro Residents More Likely Than Top-50-MSA Americans to See Sidewalks, a Short Commute, and Highway Access as *VERY* Important

Most Important Factors in Deciding Where to Live:

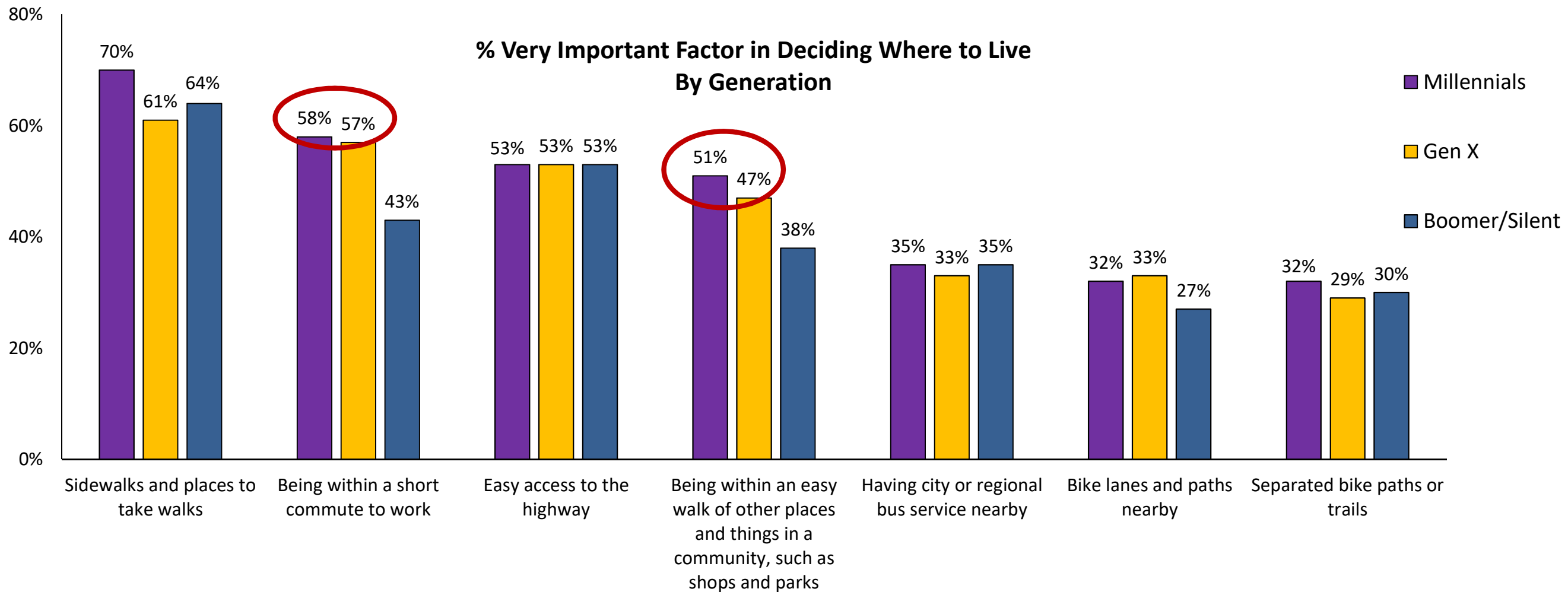
- Sidewalks and places to take walks.
- Being within an easy walk of other places and things in a community, such as shops and parks.
- Being within a short commute to work.
- Easy access to the highway.
- Having city or regional bus service nearby. / Having public transit nearby.
- Bike lanes and paths nearby.
- Separated bike paths or trails.



Q.6 Now I am going to read you a list of things about communities in general. For each one, please tell me how important each of the following would be to you in deciding where to live. Would it be very important, somewhat important, not very important, or not at all important to you?

Millennials and Gen Xers Prioritize Walkability and a Short Commute More than Older Generations

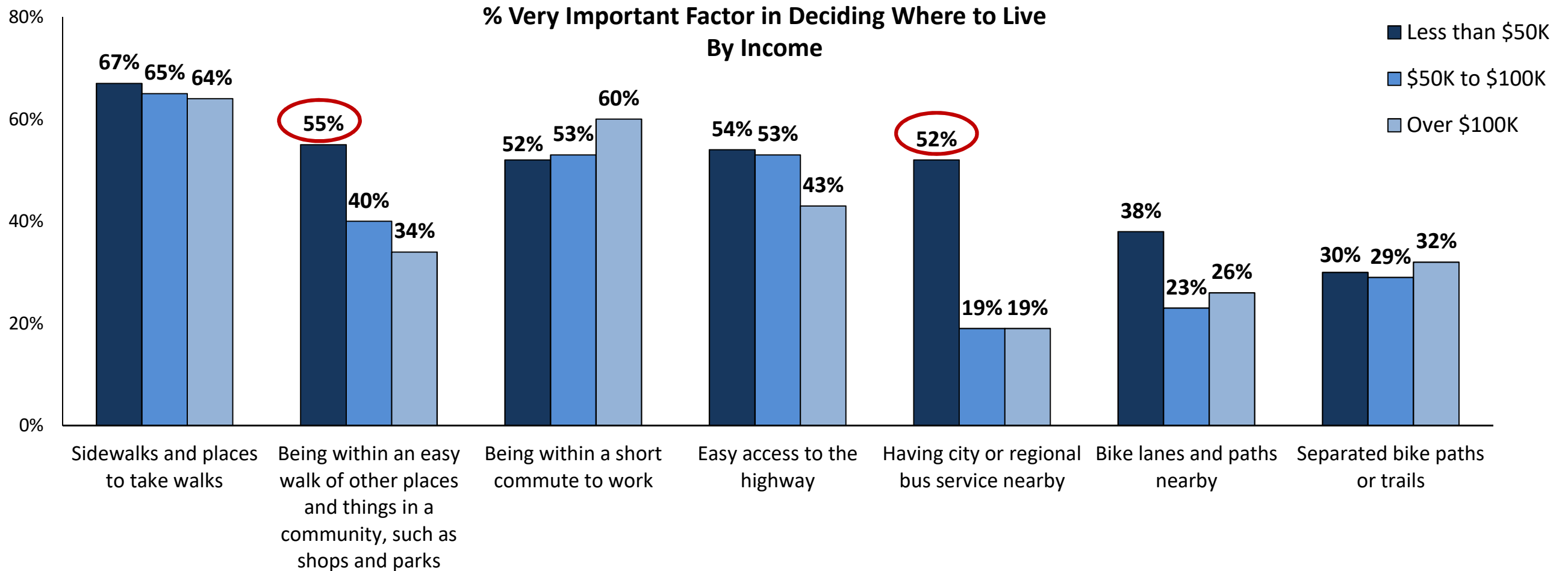
Access to the highway and bus service equally important across generations



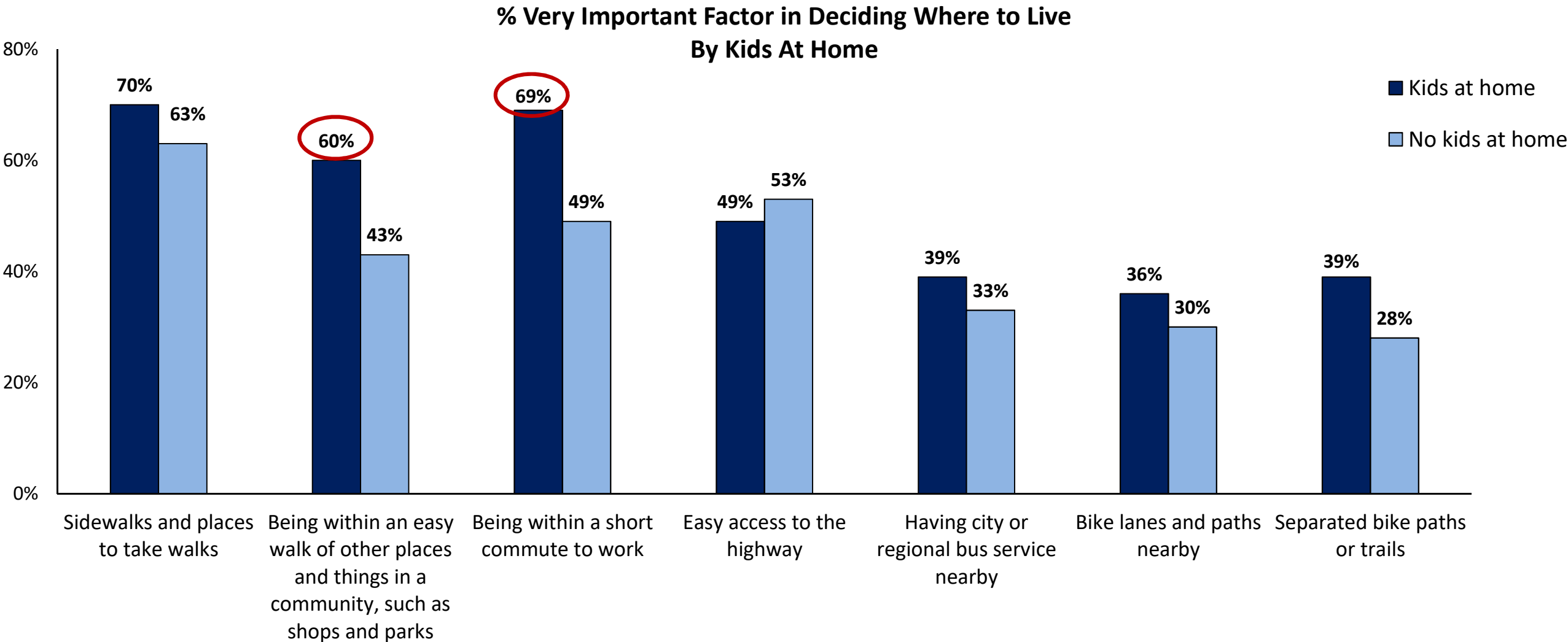
Q.6 Now I am going to read you a list of things about communities in general. For each one, please tell me how important each of the following would be to you in deciding where to live. Would it be very important, somewhat important, not very important, or not at all important to you?

Walkability and Bus Service Nearby More Important to Lower Income Residents

Higher income residents prioritize short commute to work



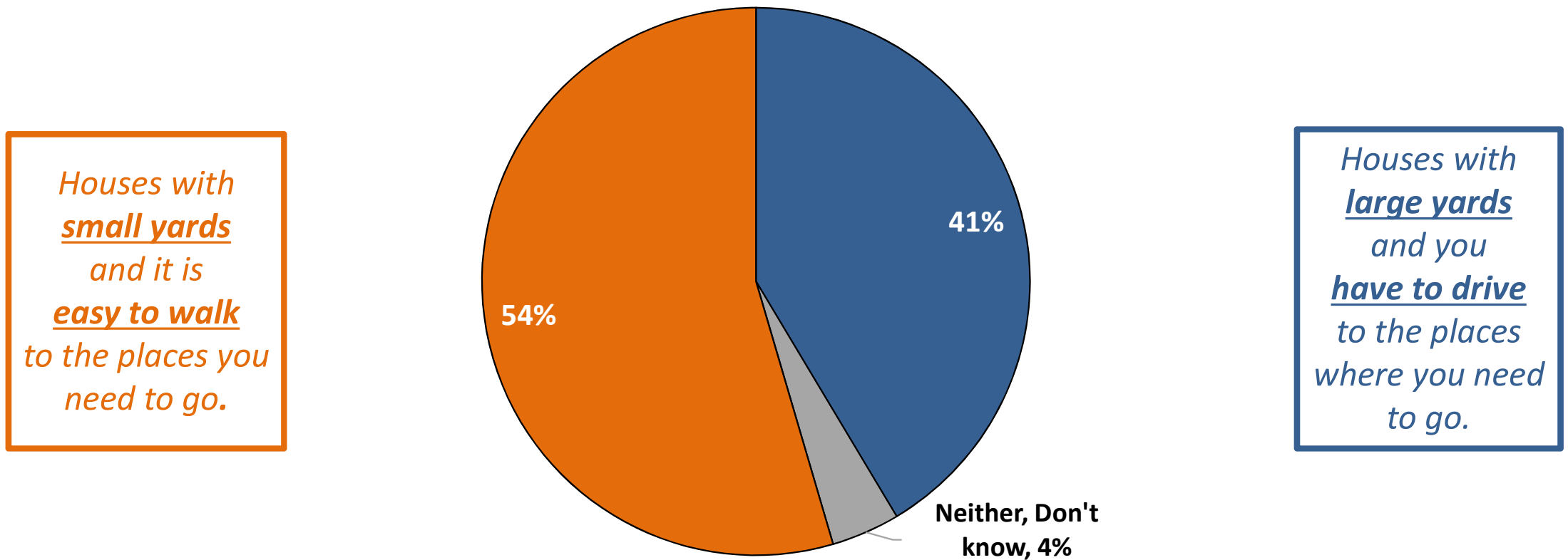
Greensboro Residents with Children at Home Prioritize A Walkable Neighborhood and a Short Commute



*Mixed Use Community v.
Conventional Suburban Community*

Over Half of Greensboro Residents Prefer Homes in a Walkable Community With Small Yards

Preferred Community:



Houses with small yards and it is easy to walk to the places you need to go.

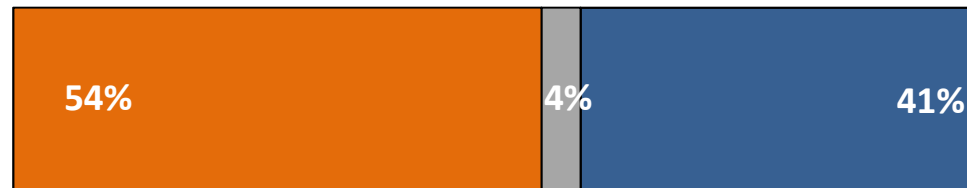
Houses with large yards and you have to drive to the places where you need to go.

Q.7 Imagine for a moment that you are moving to another community. Which of the following communities would you prefer to live in?

Greensboro Residents Reflect National Trends: Slight Majority Prefer Walkability Even with Smaller Yard

Preferred Community:

Greensboro



National



Houses with small yards and it is easy to walk to the places you need to go.

Houses with large yards and you have to drive to the places where you need to go.

Q.7 Imagine for a moment that you are moving to another community. Which of the following communities would you prefer to live in?

Older Generations More Willing to Give Up Large Yard In Order to Live in Walkable Community

Preferred Community by Generation

Millennial



Gen X



Boomer/Silent



Houses with small yards and it is easy to walk to the places you need to go.

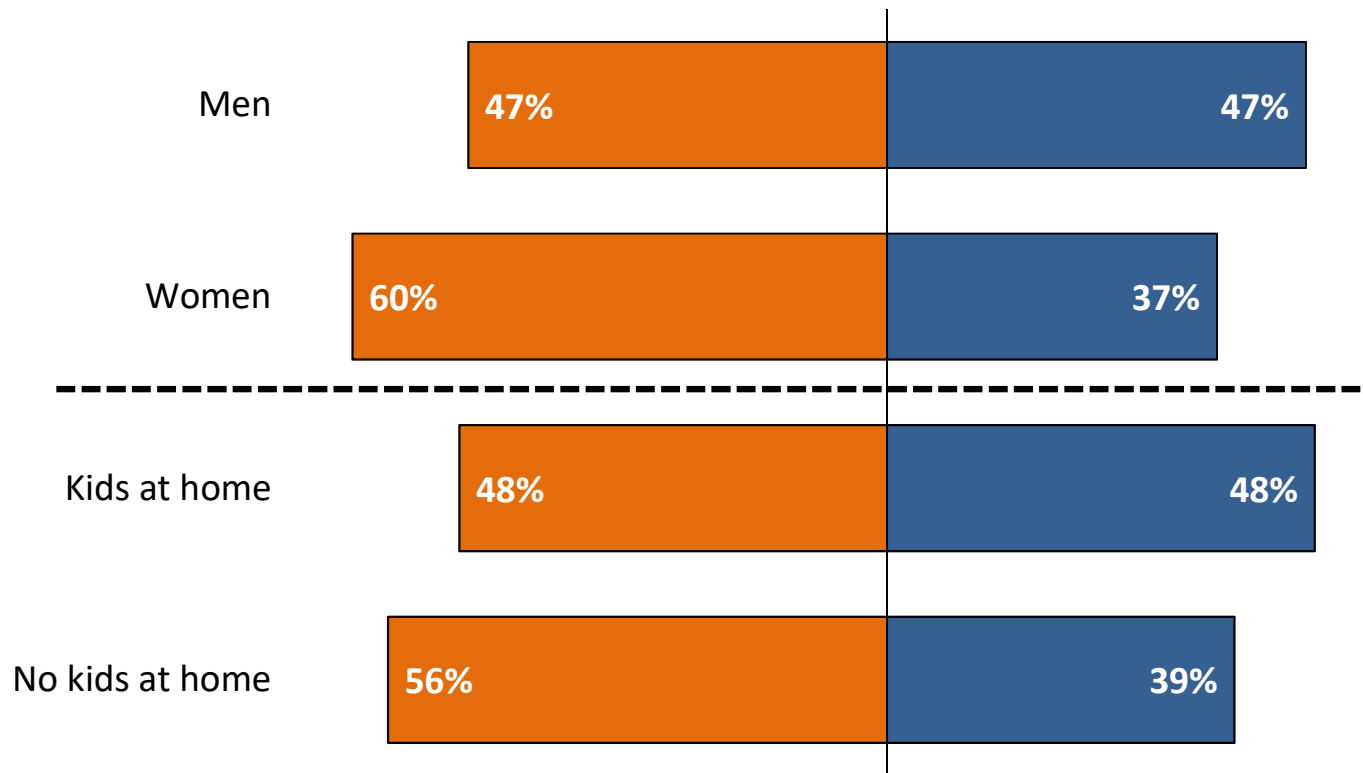
Houses with large yards and you have to drive to the places where you need to go.

Q.7 Imagine for a moment that you are moving to another community. Which of the following communities would you prefer to live in?

Women and Those Without Kids at Home More Likely to Prefer Small Yard in Walkable Community

Men and those with kids at home split on preference

Preferred Community Gender and Kids at Home



Houses with small yards and it is easy to walk to the places you need to go.

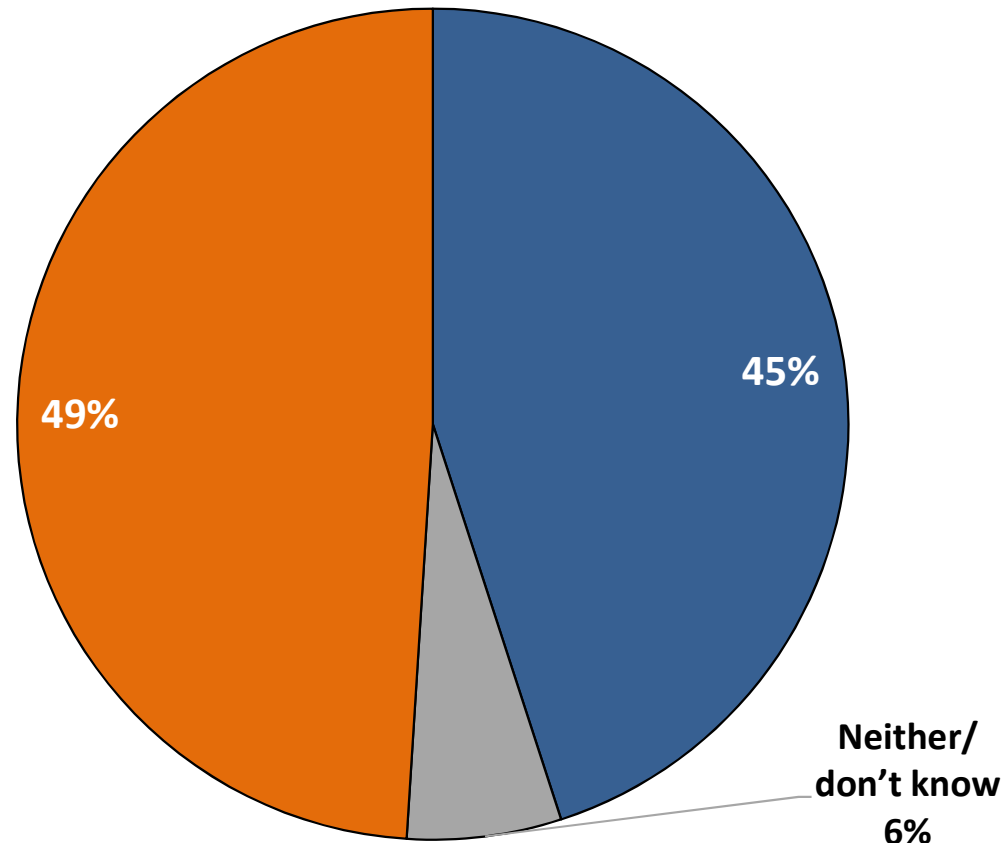
Houses with large yards and you have to drive to the places where you need to go.

Q.7 Imagine for a moment that you are moving to another community. Which of the following communities would you prefer to live in?

Residents of Greensboro Show Slight Preference for Attached Home if it Means a Walkable Community and Shorter Commute

Preferred Community:

Own or rent an apartment or townhouse and you have an easy walk to shops and restaurants and have a shorter commute to work.

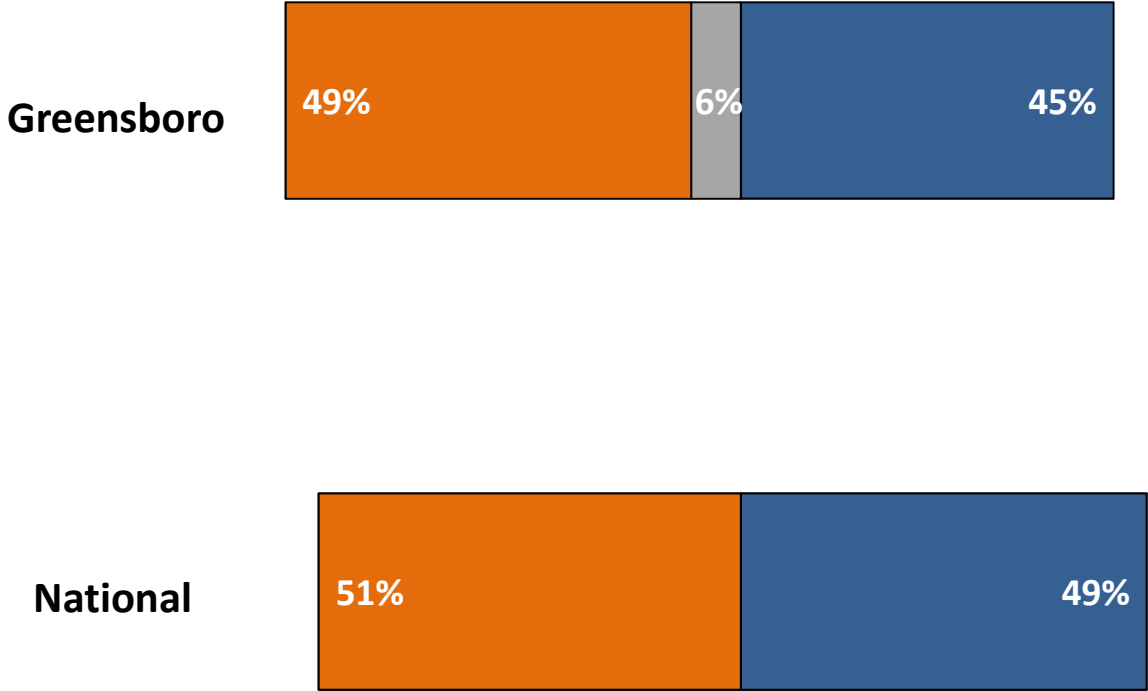


Own or rent a detached, single-family house and you have to drive to shops and restaurants and have a longer commute to work.

Q.8 Imagine for a moment that you are moving to another community. Which of the following communities would you prefer to live in?

Greensboro Residents Similar to National Residents on Split in Preference Between Attached Home with Short Commute Versus Detached Home with Longer Commute

Preferred Community:



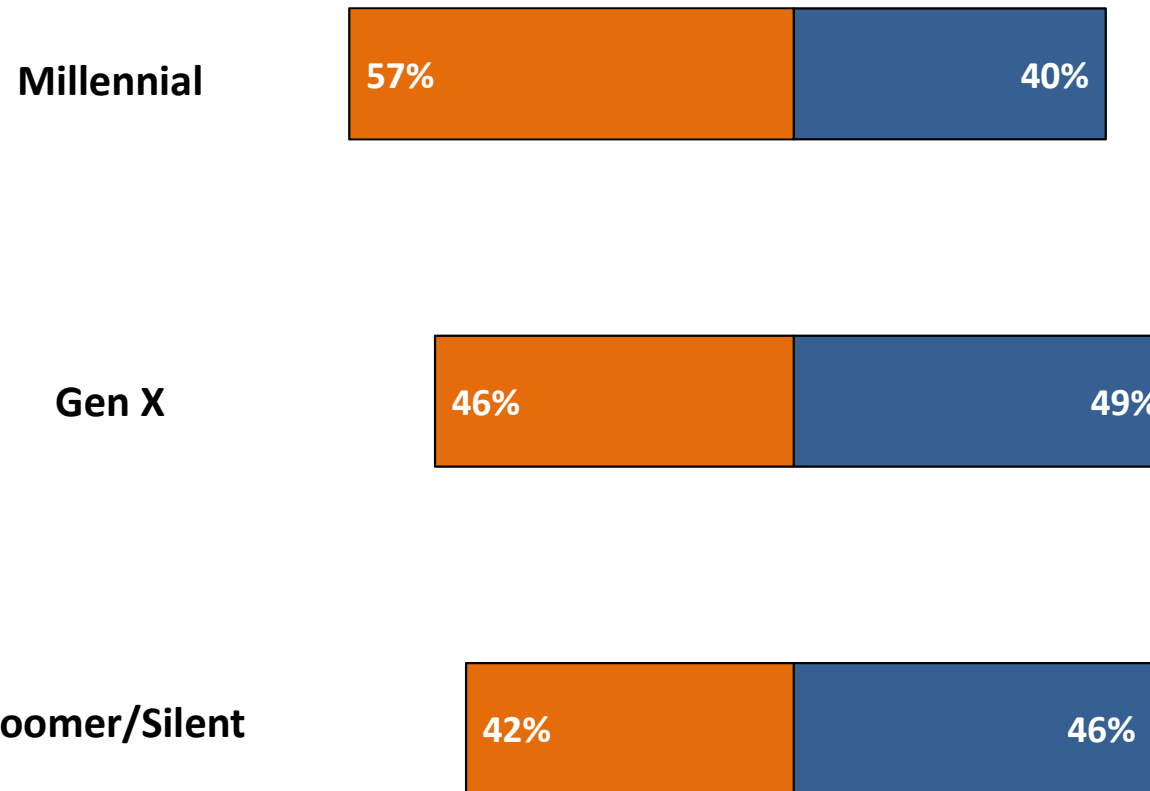
Own or rent an apartment or townhouse and you have an easy walk to shops and restaurants and have a shorter commute to work.

Own or rent a detached, single-family house and you have to drive to shops and restaurants and have a longer commute to work.

Q.8 Imagine for a moment that you are moving to another community. Which of the following communities would you prefer to live in?

Millennials More Likely to Sacrifice Detached Family Home if it Means Shorter Commute to Work

Preferred Community by Generation



Own or rent an apartment or townhouse and you have an easy walk to shops and restaurants and have a shorter commute to work.

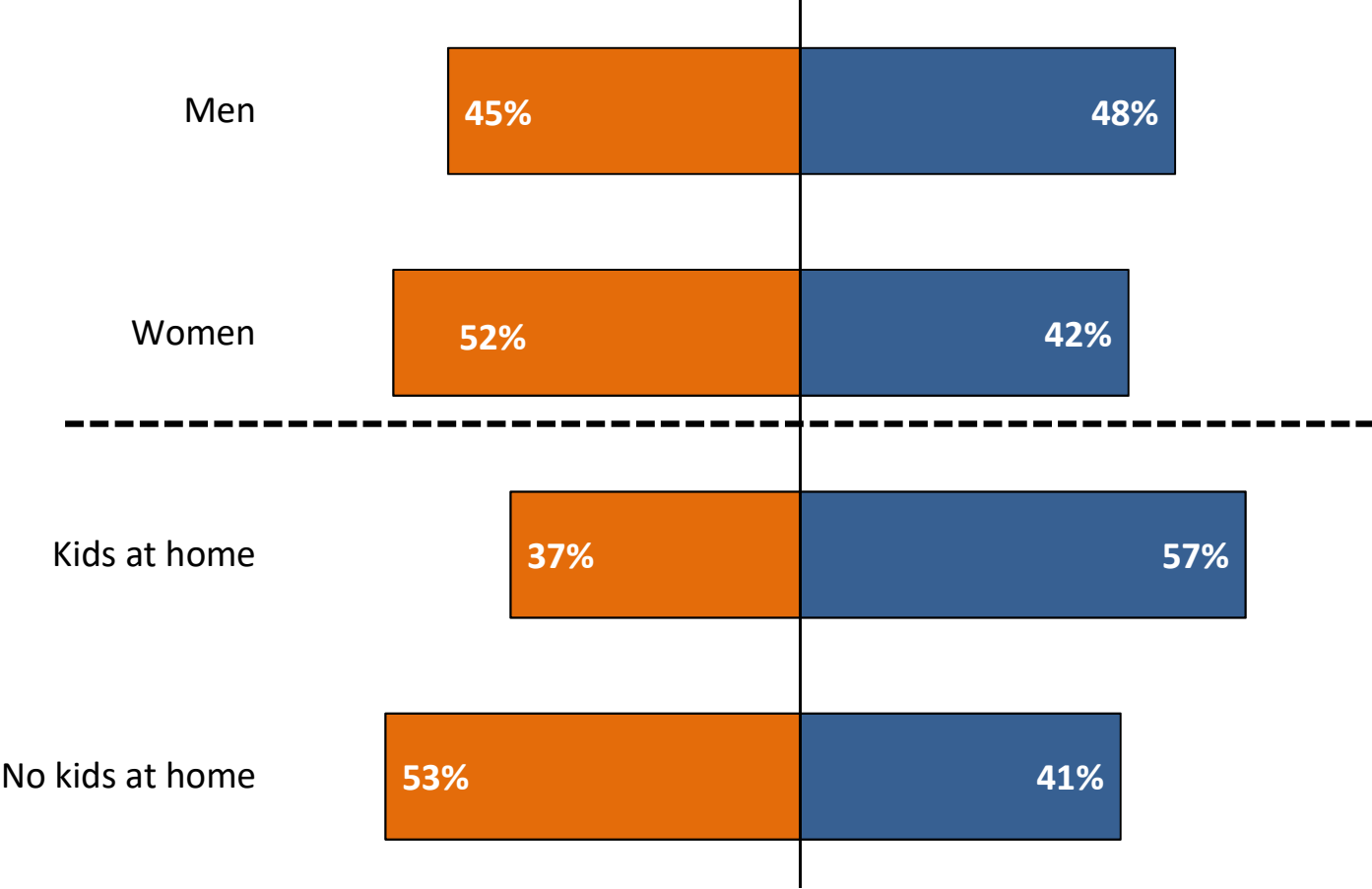
Own or rent a detached, single-family house and you have to drive to shops and restaurants and have a longer commute to work.

Q.8 Imagine for a moment that you are moving to another community. Which of the following communities would you prefer to live in?

Women's Desire For Short Commute Trumps Desire for Detached Home

Those with kids at home remain committed to detached home

Preferred Community by Gender and Kids at Home



Own or rent an **apartment or townhouse** and you have an **easy walk** to shops and restaurants and have a **shorter commute** to work.

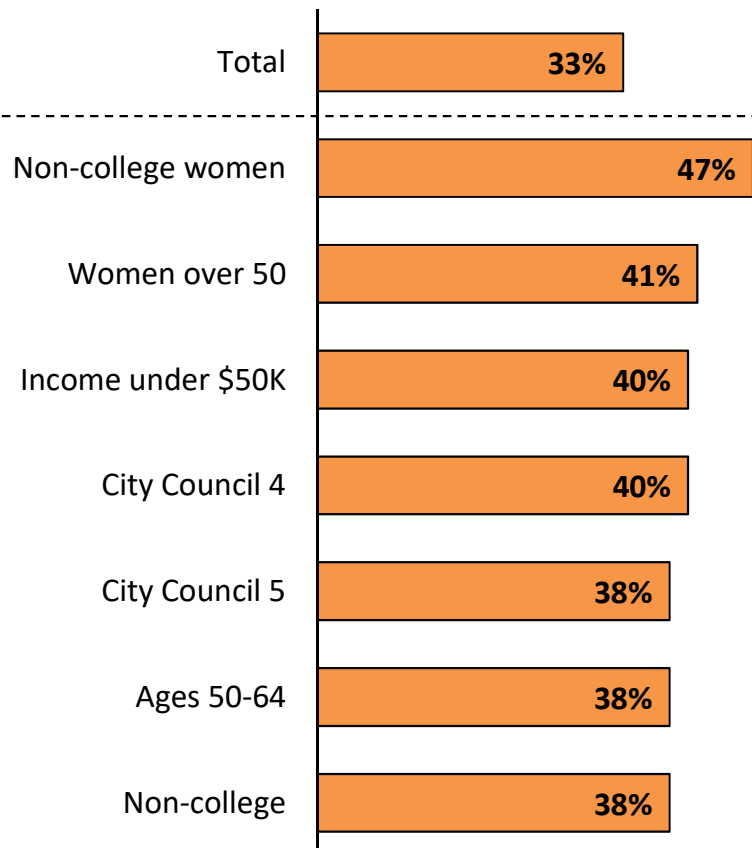
Own or rent a **detached, single-family house** and you **have to drive** to shops and restaurants and have a **longer commute** to work.

Q.8 Imagine for a moment that you are moving to another community. Which of the following communities would you prefer to live in?

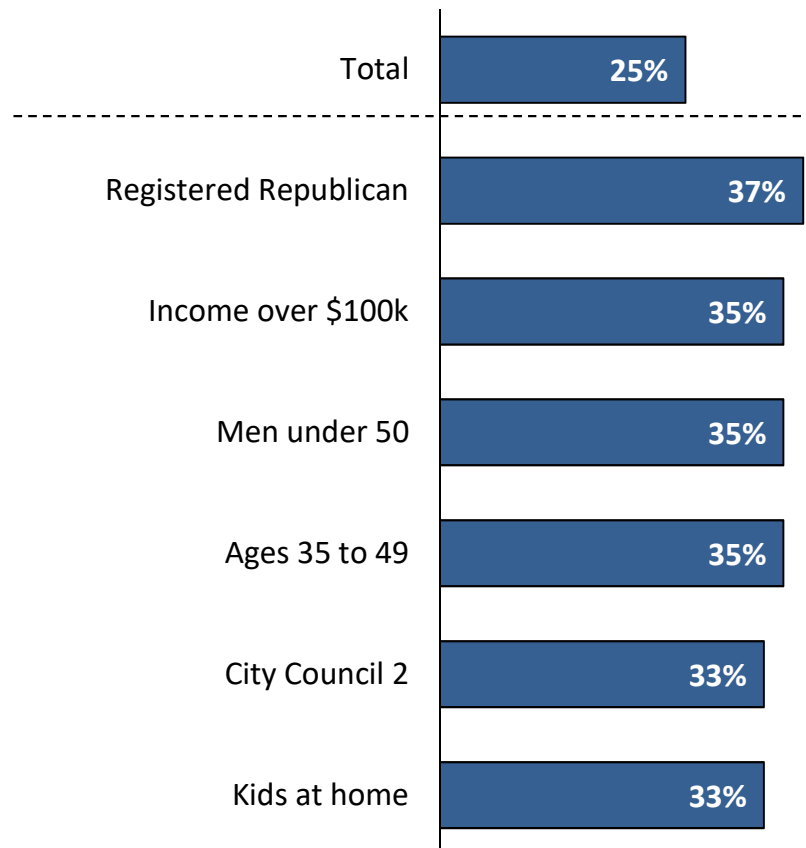
Those Inconsistent in their Community Preference More Likely to Live in Council District 1 or Be Over Age 50

Non-college and older women, lower income residents more likely to consistently favor walkable community

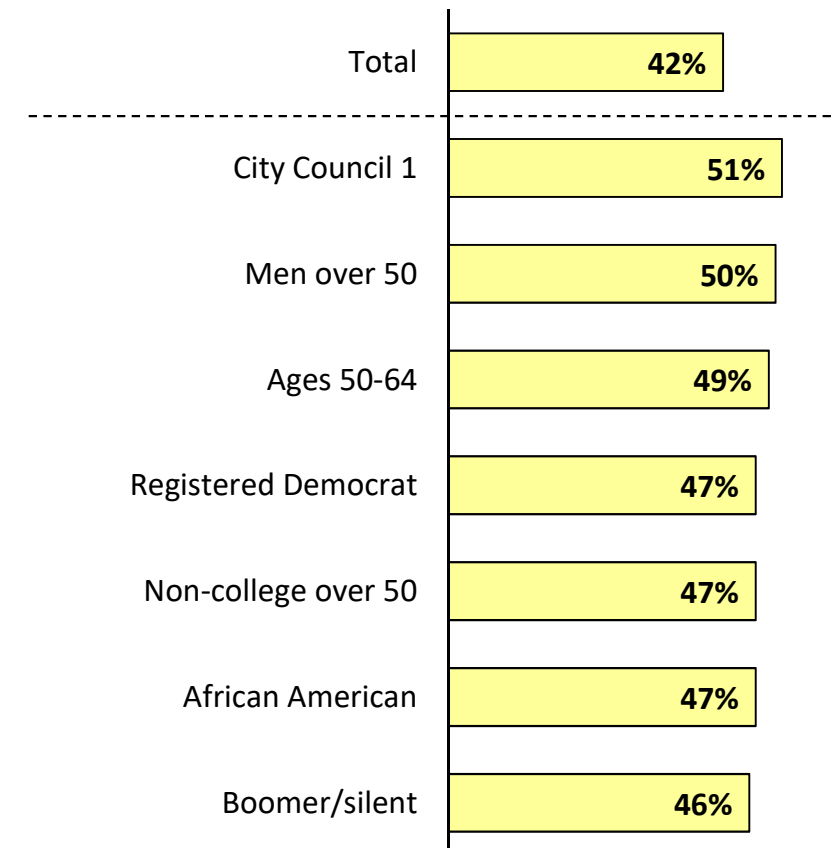
Most Likely to Consistently Prefer Walkable Community



Most Likely to Consistently Prefer Drivable Community



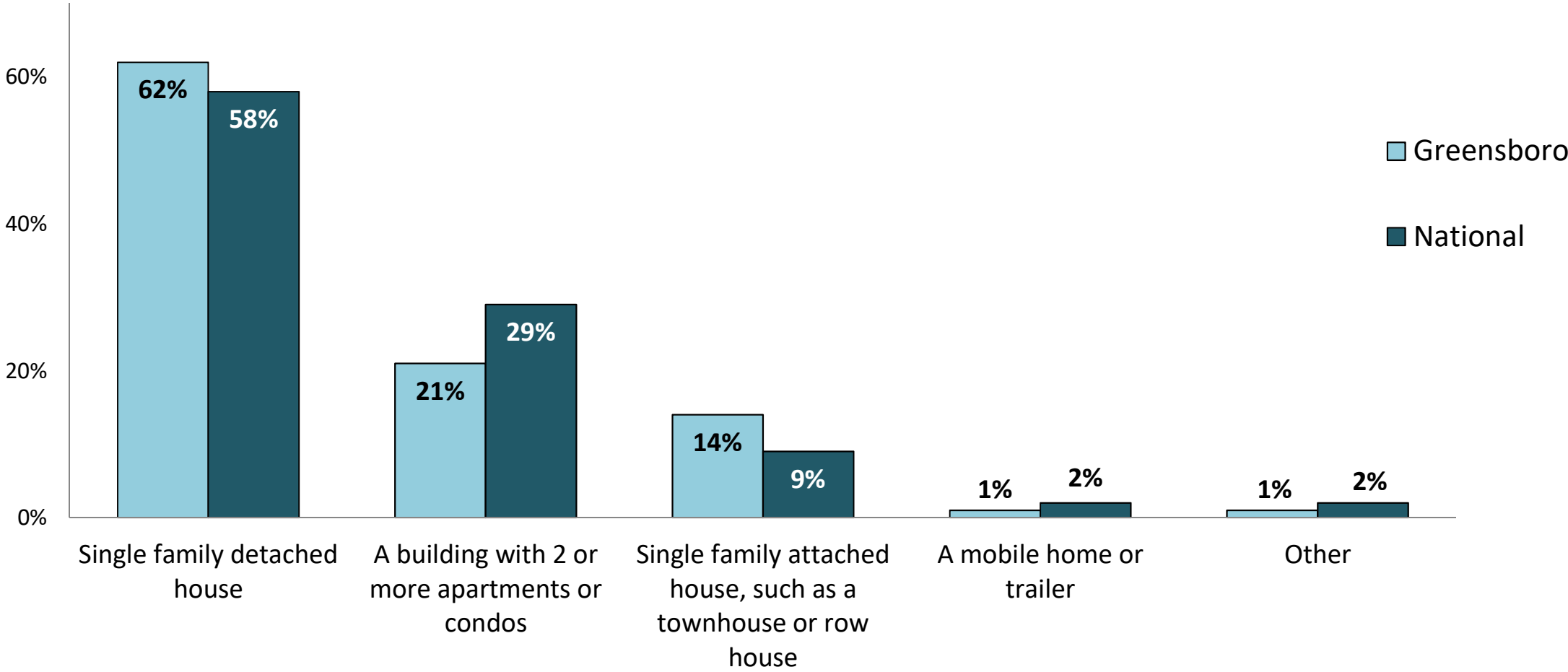
Most Likely to Be Inconsistent in Community Preference



Please select the community where you would prefer to live:

Three-Quarters of Greensboro Residents Live in a House – Attached or Detached – compared to Two-Thirds in the Top 50 MSAs

Type of Home You Currently Live In



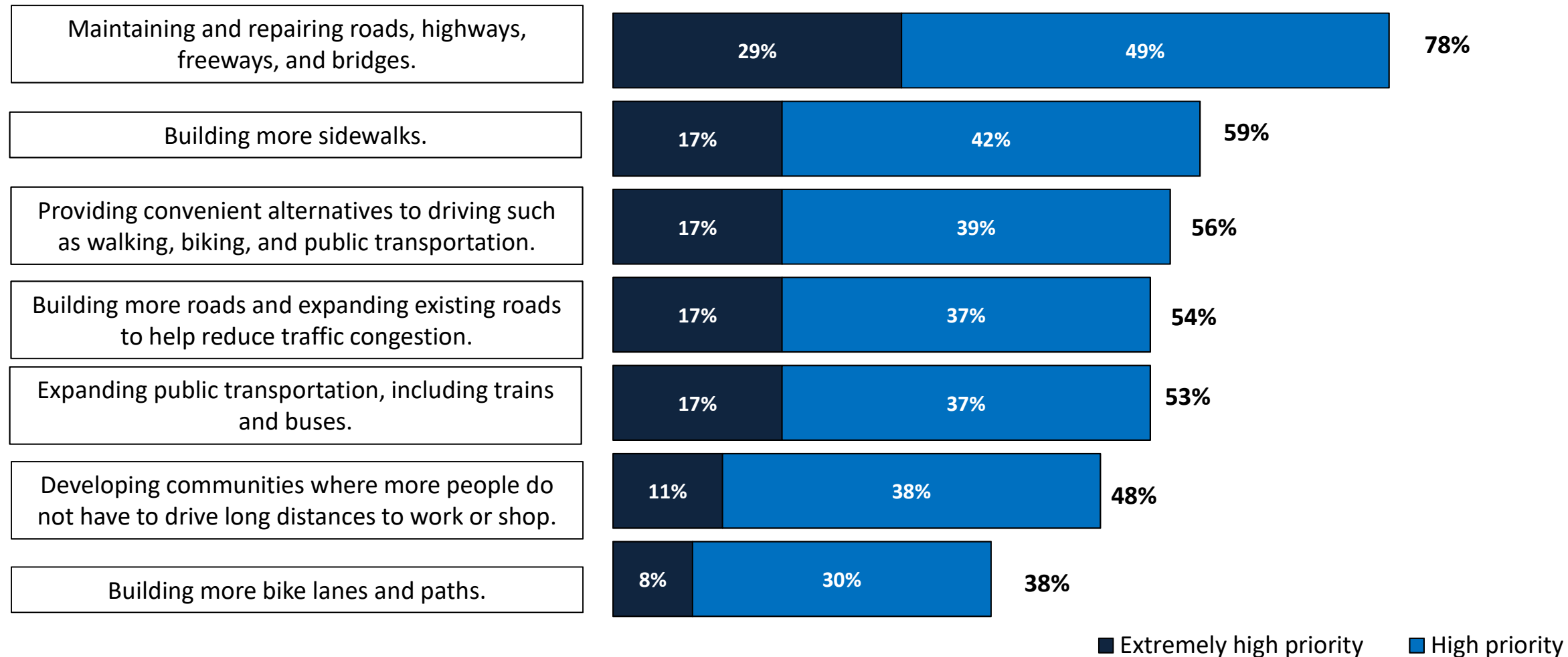
Q.9 Which of the following types of homes do you currently live in? Do you live in a single family detached house, a single family attached house such as a townhouse or rowhouse, a building with 2 or more apartments or condos, or a mobile home or trailer?

Transit and Transportation

Maintaining Roads, Highways, and Bridges is a Clear Priority

Building more sidewalks also a higher priority for Greensboro residents

Issue Priority for Local Government

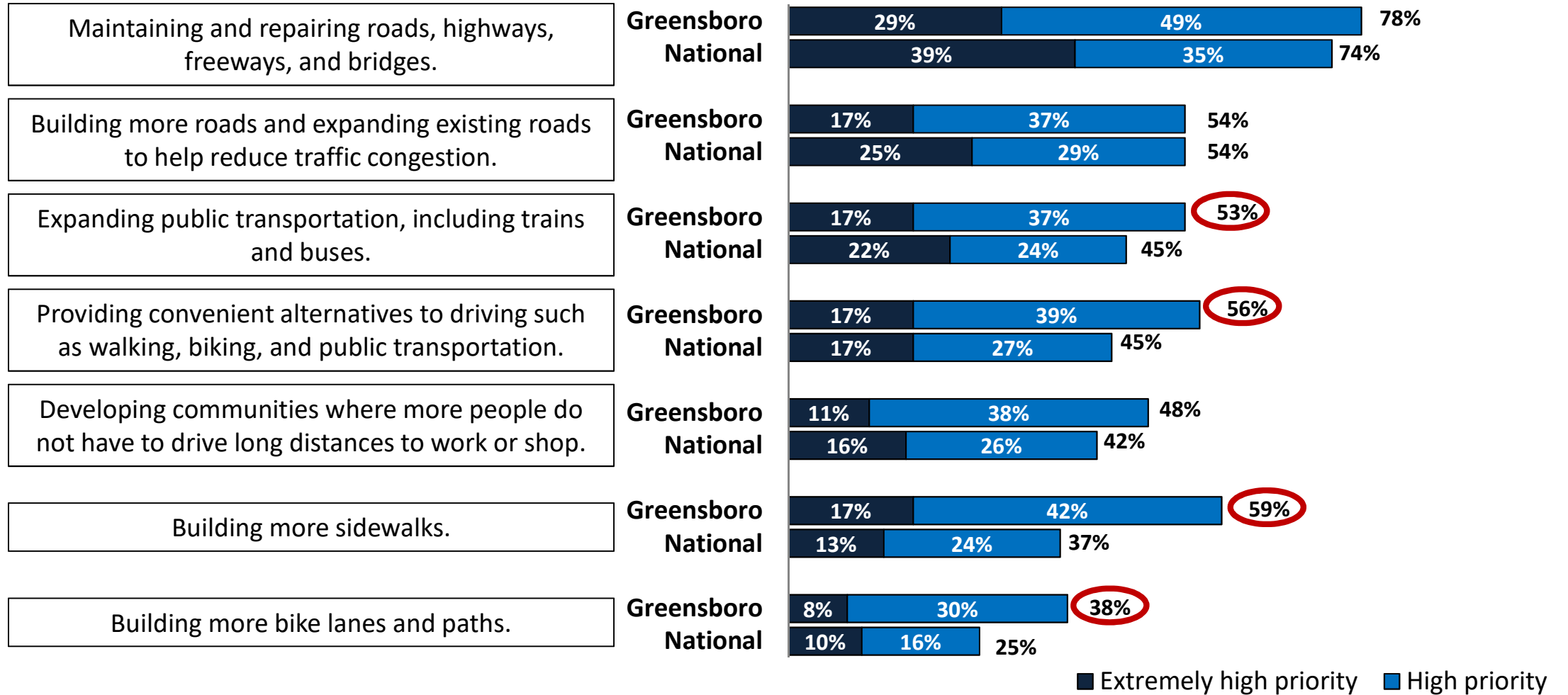


Q.10 Switching gears a bit, I'm going to read you a list, and I'd like you to tell me whether each of the following should be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for local governments in your area.

Greensboro Residents Somewhat More Likely to Prioritize Transportation Alternatives than Top-50-MSA Americans

Much more likely to prioritize building sidewalks

Issue Priority for the Government

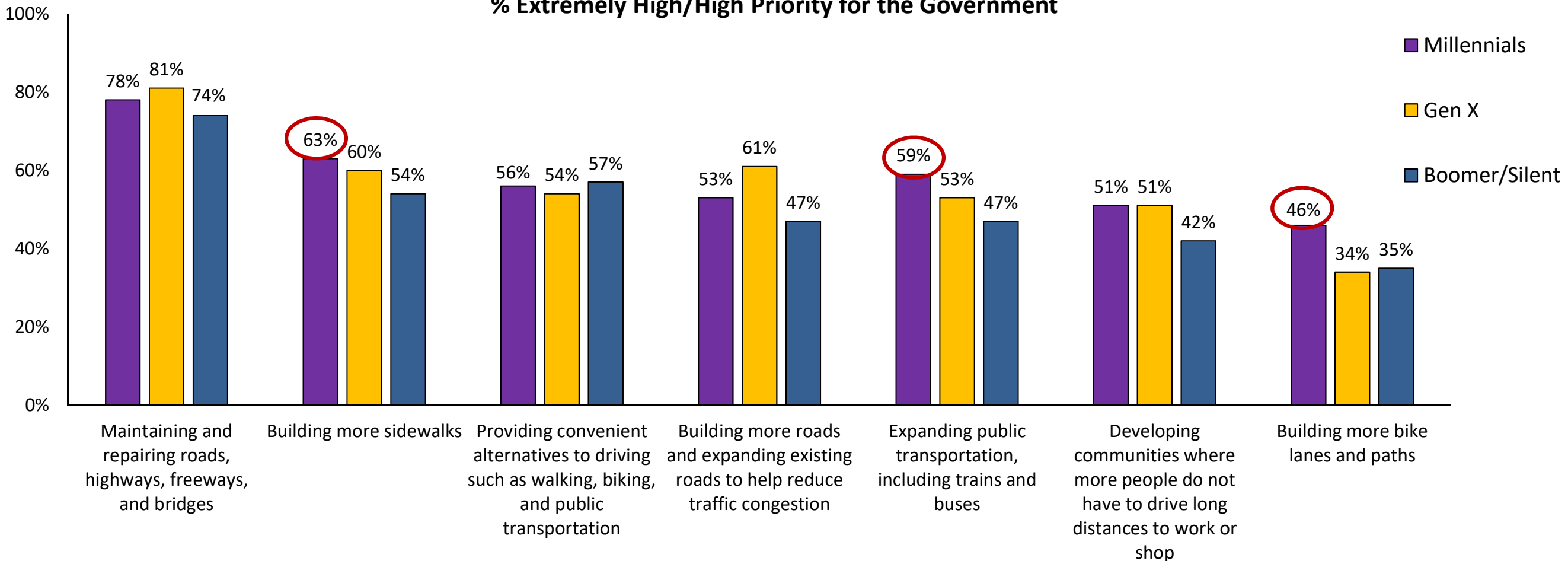


Q.10 Switching gears a bit, I'm going to read you a list, and I'd like you to tell me whether each of the following should be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for local governments in your area.

Millennials Place Higher Priority on Building More Sidewalks, Expanding Public Transportation, and Building More Bike Lanes

Maintaining and repairing roads and bridges is top priority across generations

% Extremely High/High Priority for the Government

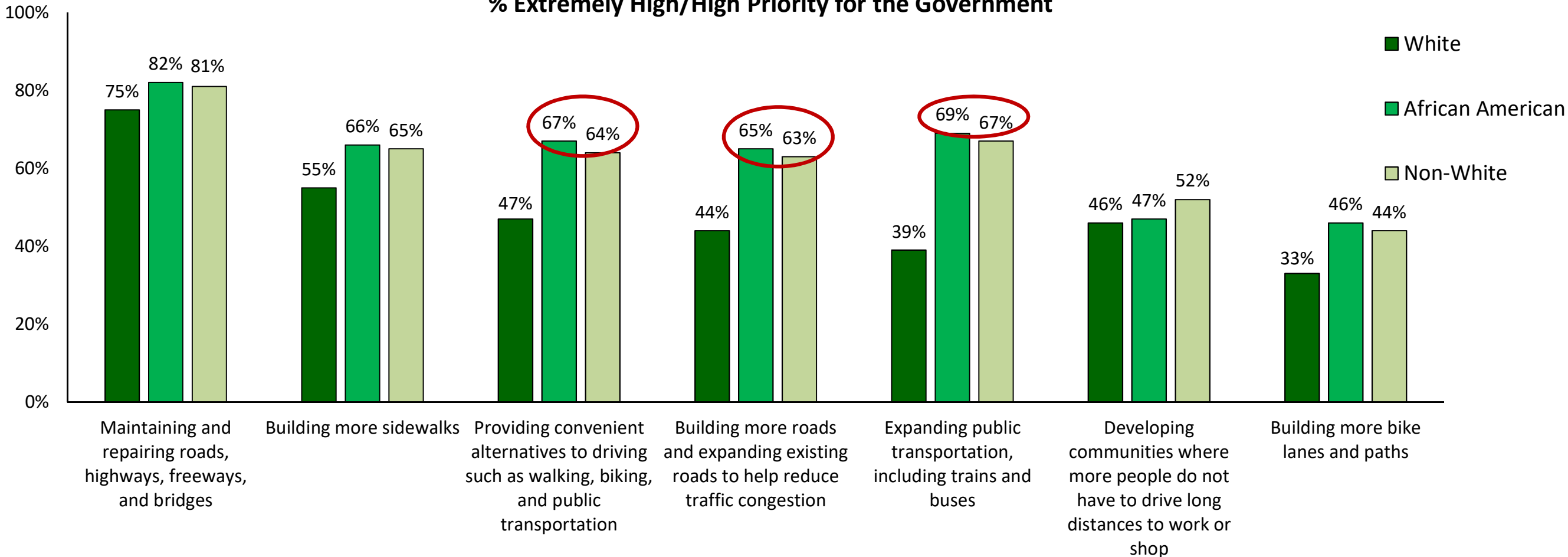


Q.10 Switching gears a bit, I'm going to read you a list, and I'd like you to tell me whether each of the following should be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for local governments in your area.

Non-White Residents in Greensboro Prioritize Transit Improvements and Increased Transit Options Significantly More Than White Residents

White residents prioritize road maintenance and building sidewalks

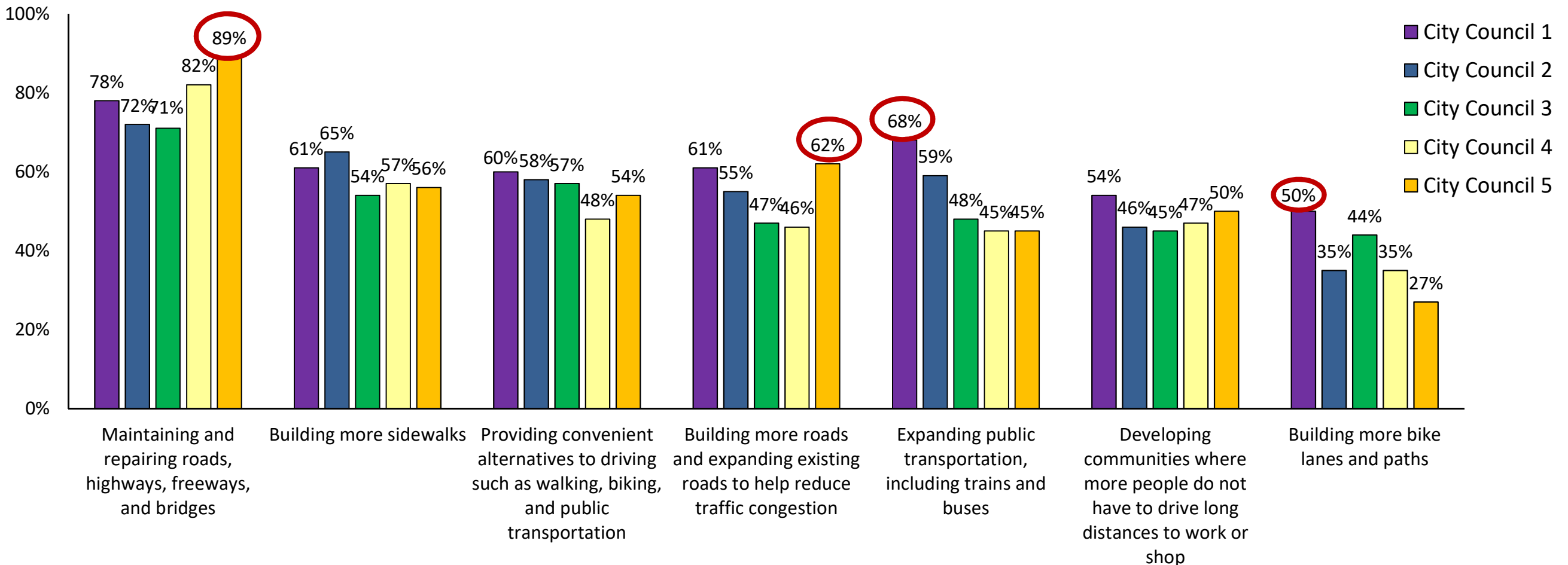
% Extremely High/High Priority for the Government



Q.10 Switching gears a bit, I'm going to read you a list, and I'd like you to tell me whether each of the following should be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for local governments in your area.

Those in City Council District 5 Are Most Likely To Prioritize Roads; Residents in the First District Prioritize Expanding Public Transit and Building Bike Lanes

% Extremely High/High Priority for the Government



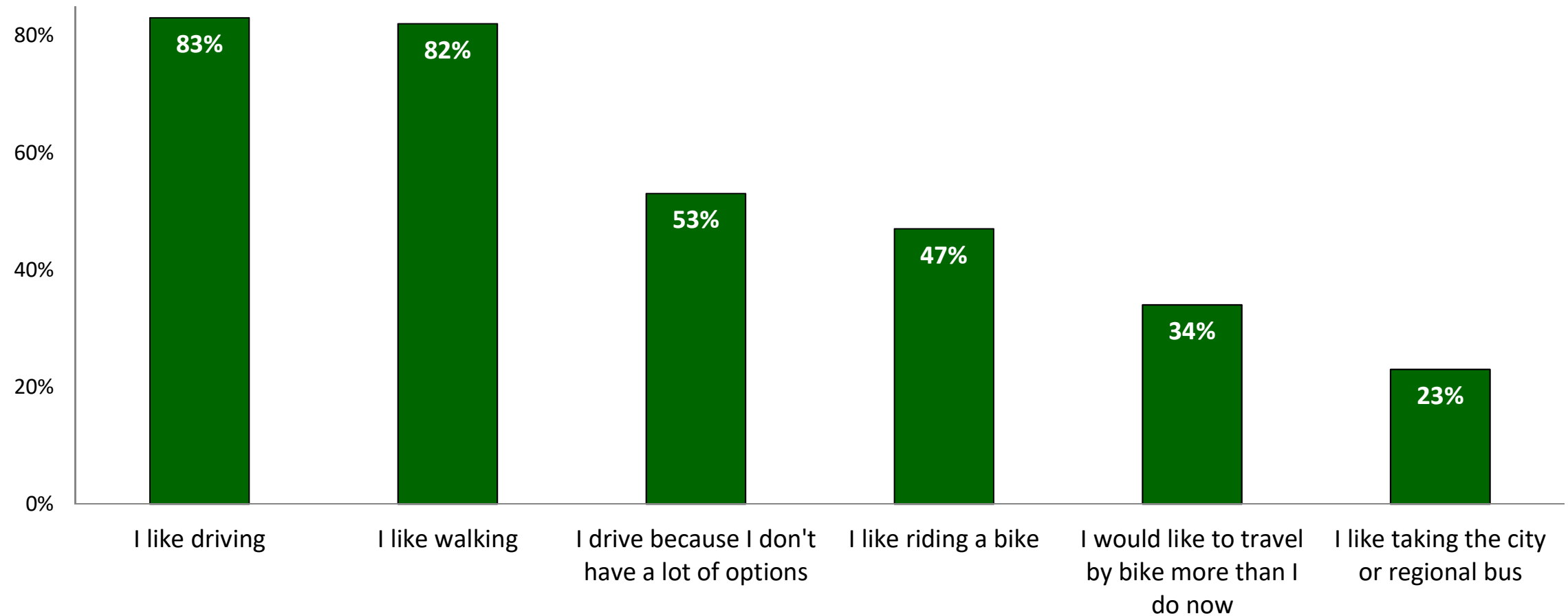
Q.10 Switching gears a bit, I'm going to read you a list, and I'd like you to tell me whether each of the following should be an extremely high priority, a high priority, a middle priority, a low priority, or an extremely low priority for local governments in your area.

Public Transportation

Most Residents Like Driving and Walking

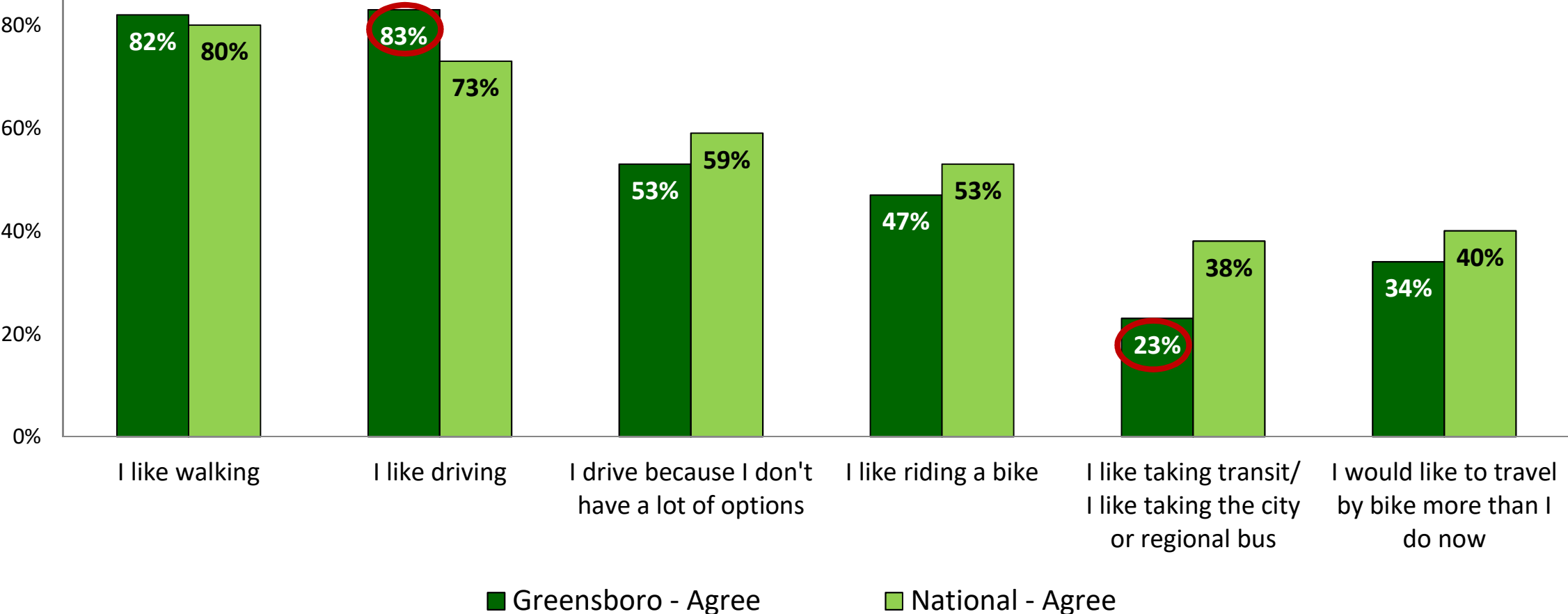
Fewer than one-in-four like taking the city or regional bus

Travel Preferences: Total Agree



Greensboro Residents Like Driving Somewhat More, Enjoy Public Transit Less Compared to Residents in Top 50 MSAs

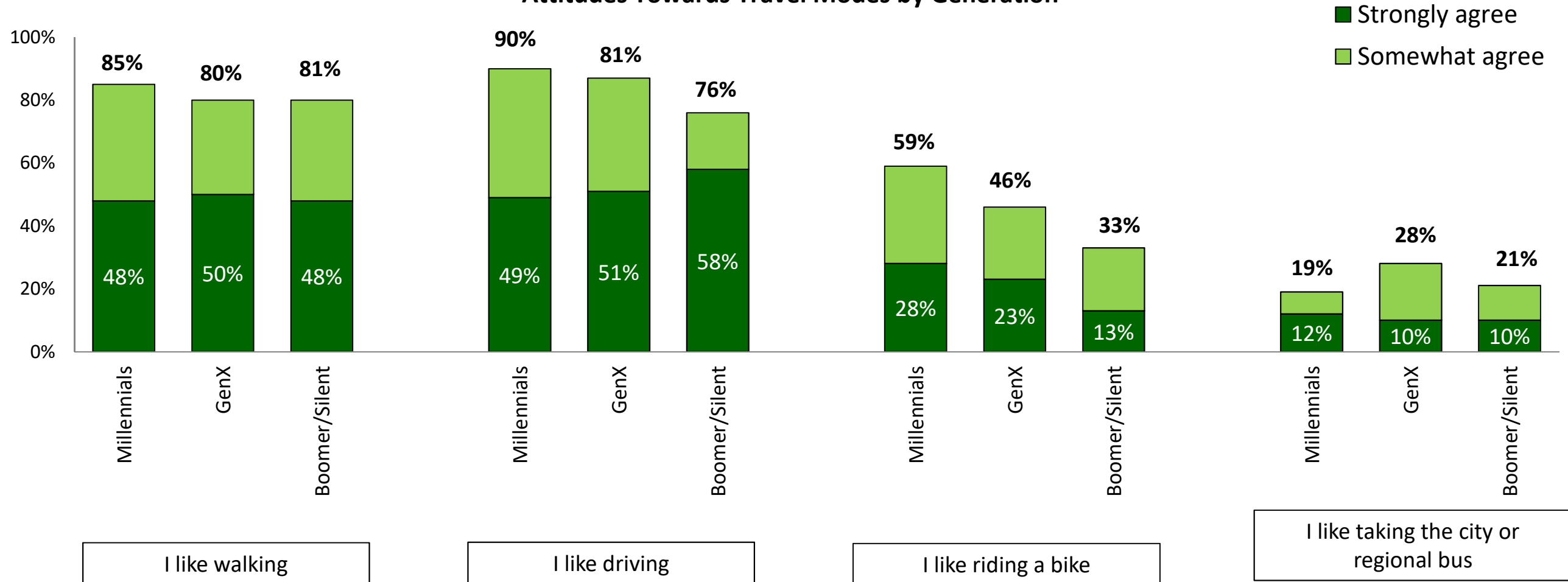
Travel Preferences



Everyone Likes Walking and Driving, But Older Generations More Intense in their Preference for Driving

Millennials more likely to like riding a bike, while few residents like taking the bus

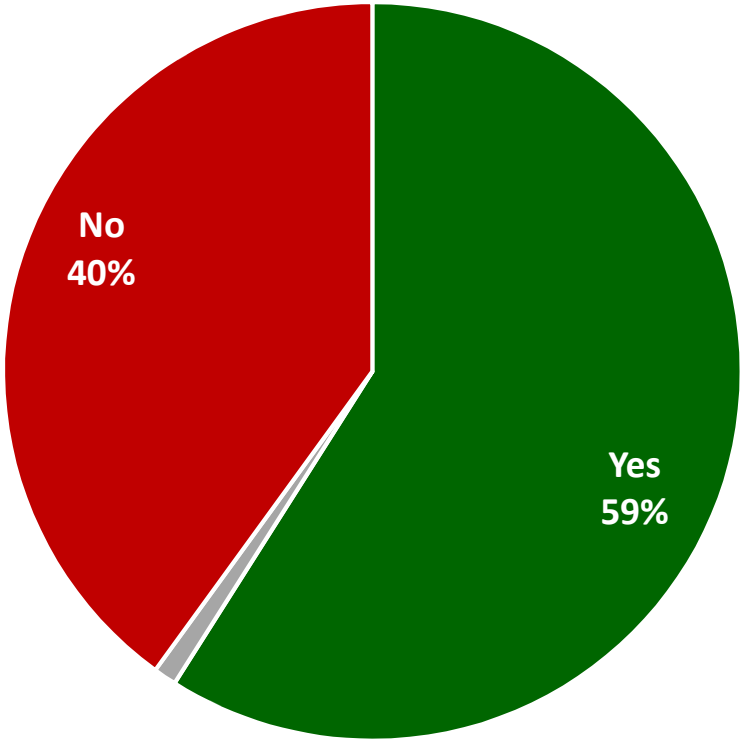
Attitudes Towards Travel Modes by Generation



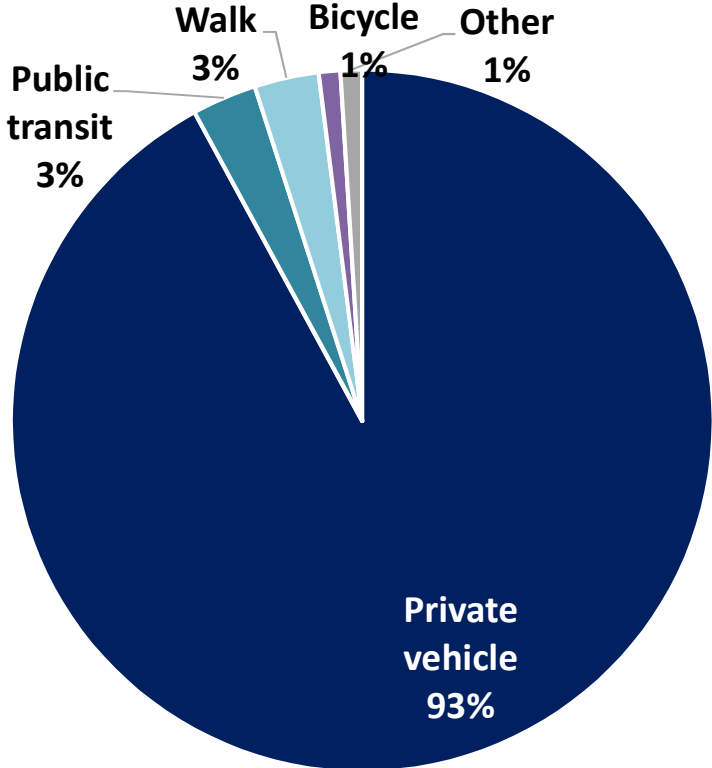
Over Half of Residents Travel for Work or School

Nine-in-ten of those who travel take a private vehicle

Travel to Work or School



How You Get To Work Or School
(N=237 Respondent)

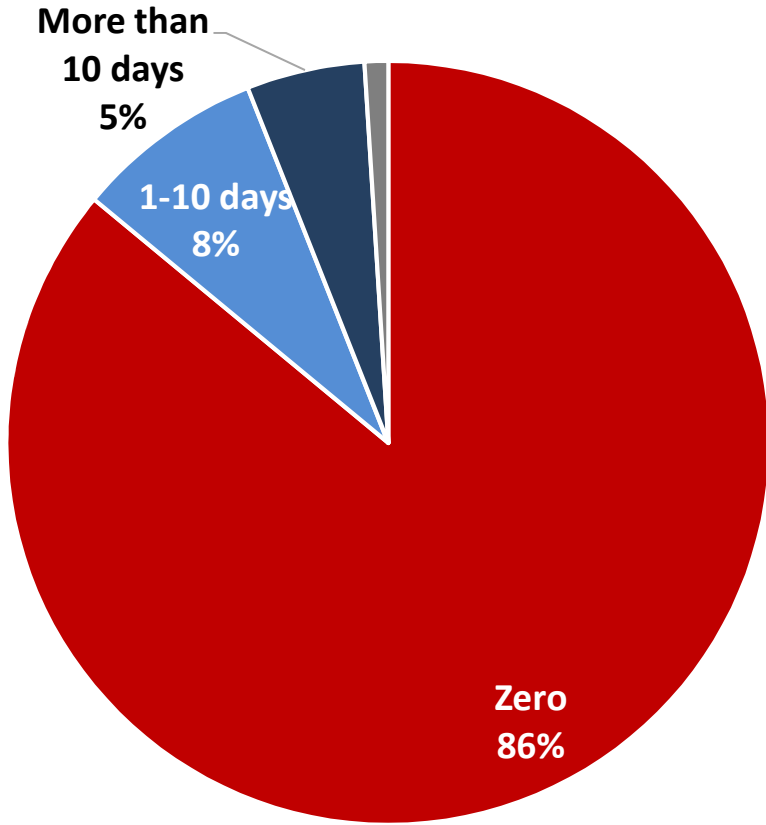


Q.12 And do you travel to work or school?

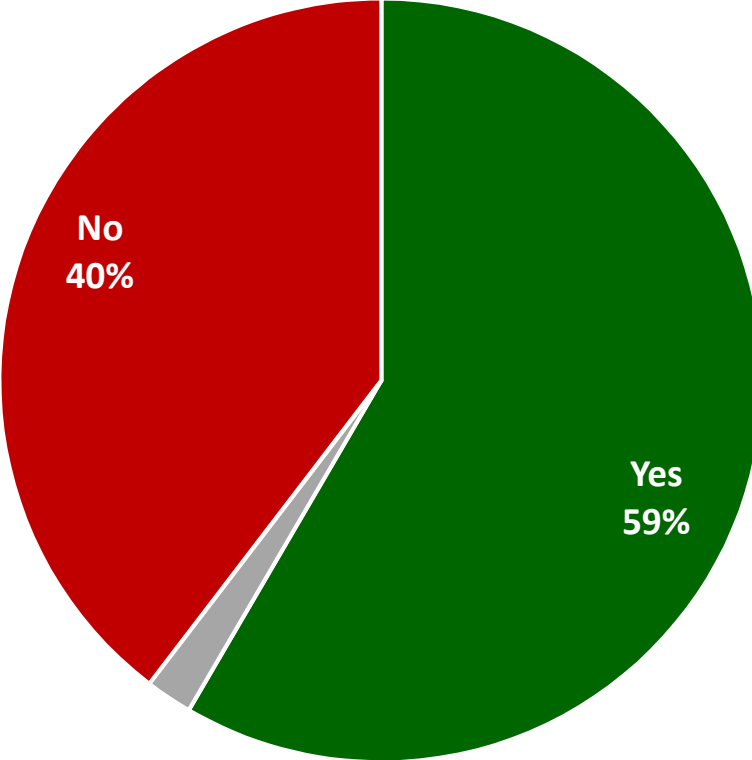
Q.13 (IF YES IN Q12) How did you usually get to work or school last week – did you take a private vehicle like a car or motorcycle, public transit like a bus or train, bicycle, or walk?

Although Broad Majority Did Not Use Public Transit in the Last Month, Over Half of Those Who Did NOT Say It Is Convenient and Available

Number of Days Used Public Transit in Last 30 Days



Is Public Transit Convenient and Available?
(n=345 Respondent)

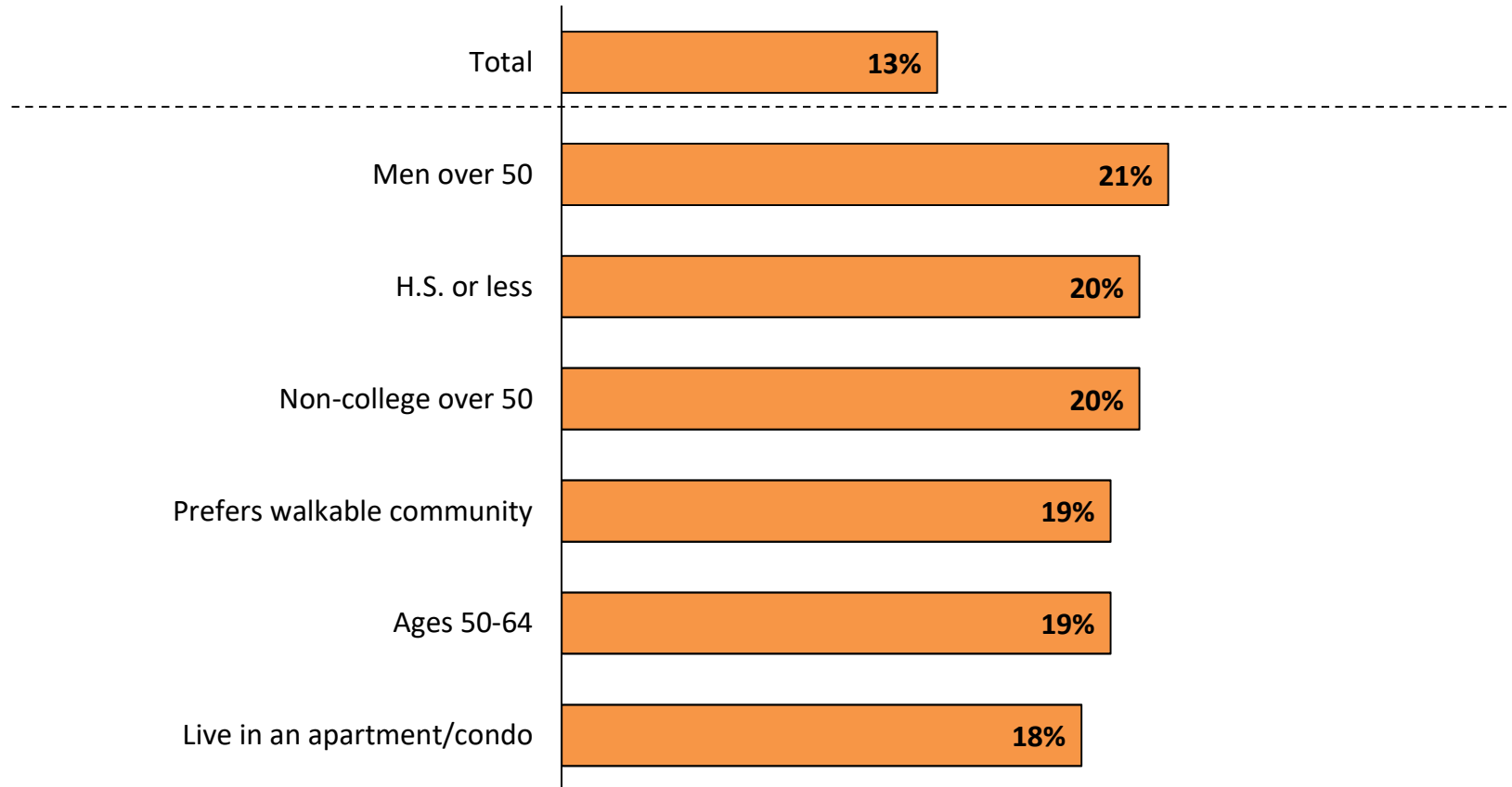


Q.14 In the past thirty days, about how many days did you use public transportation such as buses or commuter trains?

Q.15 (IF ZERO IN Q14) Is public transit available and convenient to you?

Older Men, Those With Less Education are More Likely to Have Taken Public Transit in the Last Month

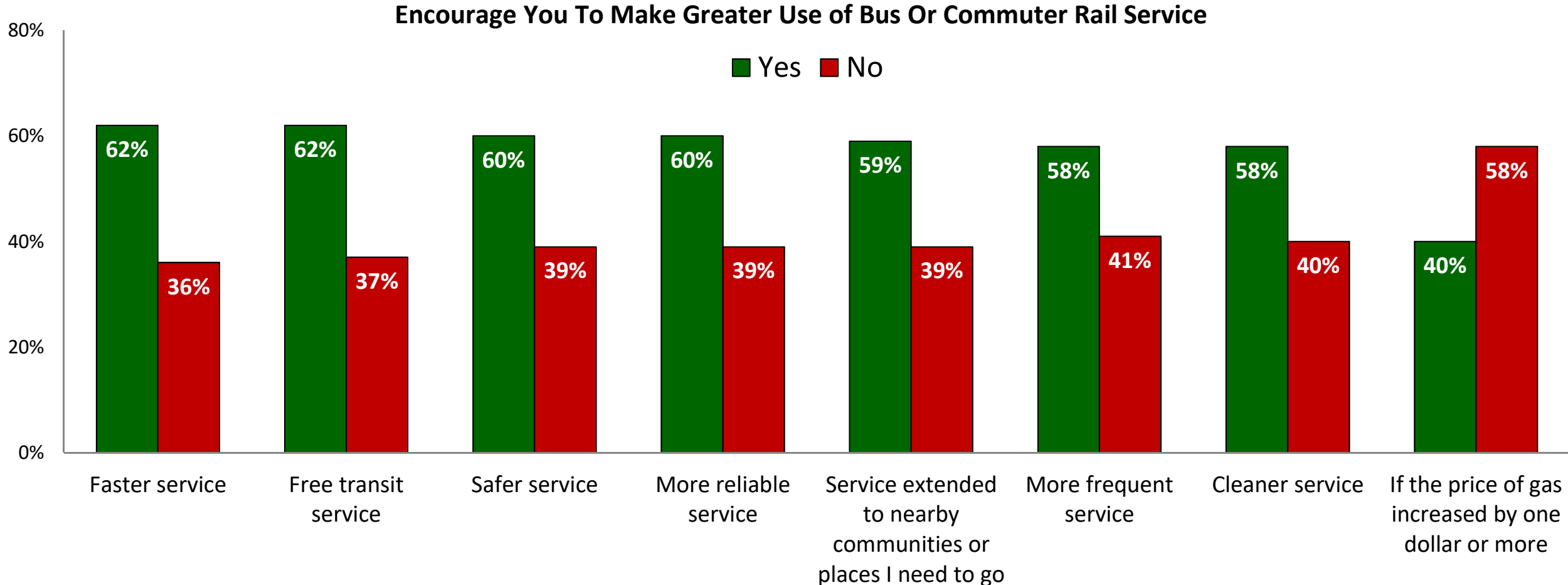
Most Likely To Take Public Transit: Have Taken At Least Once In The Last Month



Q.14 In the past thirty days, about how many days did you use public transportation such as buses or commuter trains?

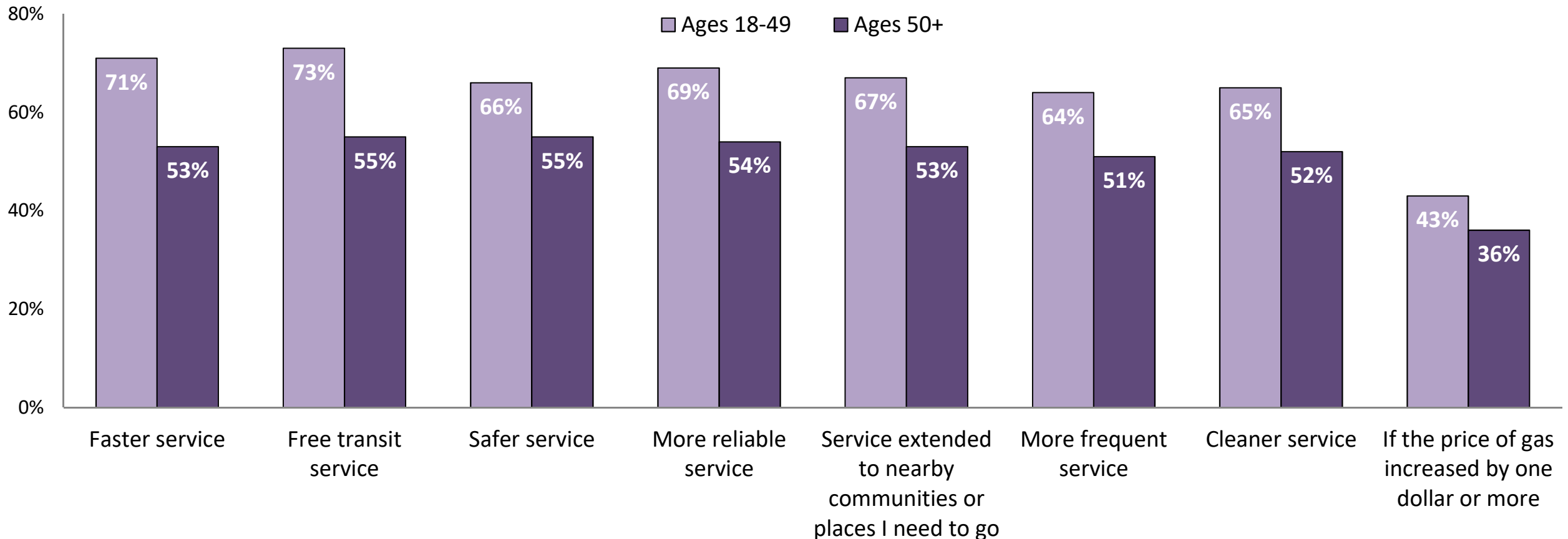
Broadening Transportation Services and Making Them Safer and More Reliable Would Encourage Majorities to Use Public Transportation More

A gas price increase would NOT encourage most to use these services more



Younger Residents Are Much More Convinced To Use Bus or Rail Service By Proposed Changes Than Older Residents

Yes, Would Encourage You To Make Greater Use of Bus Or Commuter Rail Service

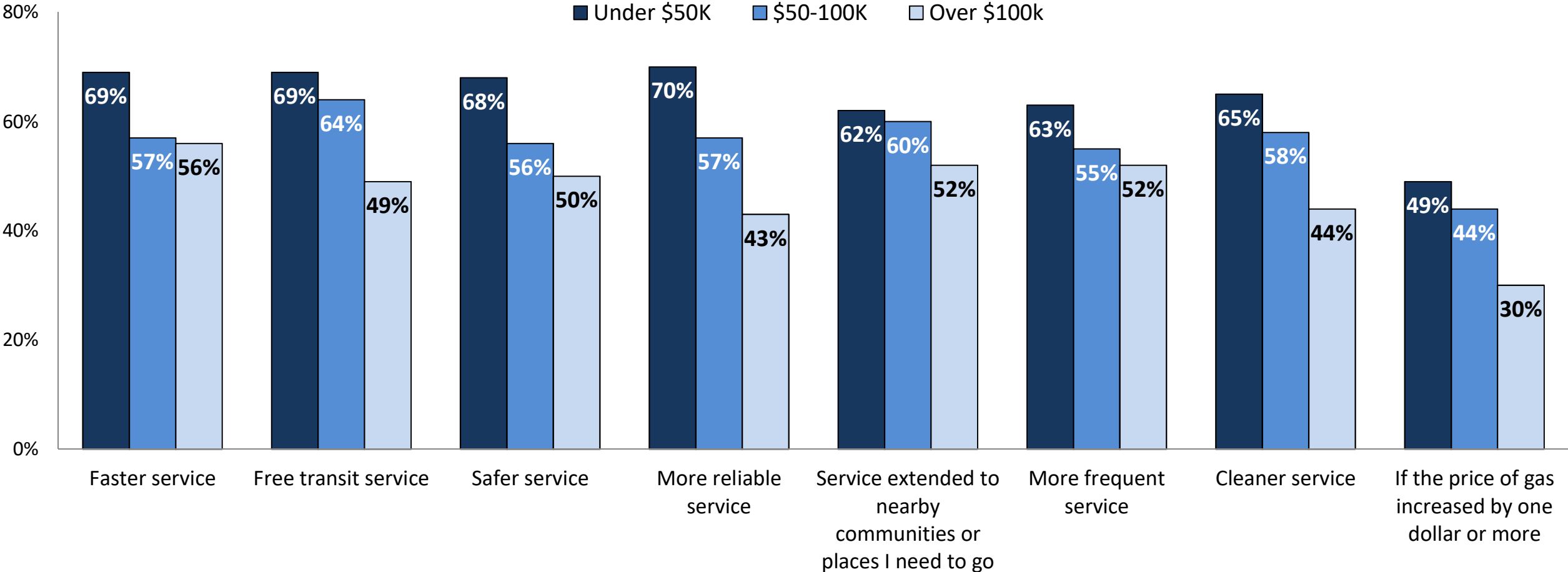


Q.16 Next, I am going to read you some statements about bus and commuter rail service. For each, please tell me, yes or no, if that would encourage you to make greater use of bus or commuter rail service.

Lower Income Residents Most Likely to Use Public Transit More if More Reliable, Faster, Safer, or Free

Upper income more focused on speed, frequency, and service to different communities

Yes, Would Encourage You To Make Greater Use of Bus Or Commuter Rail Service



Q.16 Next, I am going to read you some statements about bus and commuter rail service. For each, please tell me, yes or no, if that would encourage you to make greater use of bus or commuter rail service.

Survey Methodology

Greensboro Survey Methodology

American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 410 adults, age 18 or older who indicated they were Greensboro residents. The survey was conducted from November 13-20, 2017. The sample was randomly selected from TargetSmart's enhanced voter file. Thirty-seven percent of respondents were reached on wireless phones, twenty-one percent on VOIP phones, and forty-two percent on landlines. Quotas were assigned to reflect the demographic distribution of adult residents in Greensboro, North Carolina. The sample was downweighted to 400 respondents and the data were weighted by gender, age, race from file, and party registration from file to ensure an accurate reflection of the population. The overall margin of error is +/- 4.9%. The margin of error for subgroups is larger and varies. (Percentage totals may not add up precisely due to rounding.)

National Survey Methodology

American Strategies designed this **Internet survey** of the **top 50 metropolitan statistical areas** in the United States. The survey reached 3,000 adults, 18 years or older. The survey was conducted by YouGov **on September 5-20, 2017**.

YouGov **interviewed 3210 respondents** who were **then matched down to a sample of 3000** to produce the final dataset. The respondents were matched to a sampling frame of the top 50 MSAs on gender, age, race, education, ideology, and political interest. **The matched cases were weighted to the sampling frame using propensity scores**. The matched cases and the frame were combined and a logistic regression was estimated for inclusion in the frame. The propensity score function included age, gender, race/ethnicity, years of education, ideology, region, and voter registration status. The propensity scores were grouped into deciles of the estimated propensity score in the frame and post-stratified according to these deciles.

The sampling frame used for matching and weighting was constructed by stratified sampling from the full 2010 American Community Survey (ACS) sample with selection within strata by weighted sampling with replacements (using the person weights on the public use file). Data on voter registration status and turnout were matched to this frame using the November 2010 Current Population Survey. Data on interest in politics and party identification were then matched to this frame from the 2007 Pew Religious Life Survey.

YouGov operates an online panel of over 4 million panelists across 37 countries. These represent all ages, socio-economic groups and other demographic types which allows them to create nationally representative online samples and access hard to reach groups, both consumer and professional. Their US panel has 1.8 million respondents.