

IN FOCUS

Public Opinion Polling Profile: Gen Z and Millennials



Valley Vision and **Sacramento State, Institute for Social Research (ISR)** have partnered to conduct four public opinion polls since 2017. Our polls have looked at Capital Region residents' priorities, values, experiences, and preferences on Civic Amenities, Transportation, Quality of Life, and the Environment (link to all four reports [here](#)). These polls give **insight into Capital Region residents' views on current issues** and help inform decision-makers' strategies and investments related to public infrastructure and community well-being. This report is part of a series of unique profiles that will zero in on subsets of our region's population to see how our respective ages or other social, geographic, or demographic characteristics influence our experiences, providing a more in-depth view of our region.





Our first report will look at how Millennials and Gen Z (aged 18-38) collectively view the region¹. **How do these generations think about their communities and what are their preferences and priorities for the types of communities that they want to live in?**

Age plays a significant role on how residents view the region. Each generational age demographic contains key indicators for the region on equity, prosperity, and the built environment. In very general terms, the views of our youngest surveyed generations – Gen Z and Millennials – reflect the views of future and emerging decision-makers and show where we are going. The views of our middle generation – Generation X – reflects how well our communities are suited for families and middle age. The views of our oldest generations – Baby Boomers and the Silent Generation – reflect how our communities treat those nearing retirement, elders in need of care, and those living on a fixed income. This research report will take a deep-dive look at the views of Gen Z and Millennials, collectively aged 18-38 in our surveys.

Some of the key take-aways about the youngest generations in the Capital Region are:

- **Gen Z and Millennials are the most mobile and the least attached – the region will need to earn their continued engagement and connection.**
- **Gen Z and Millennials look for affordability and access to opportunity when they make decisions about where to live. Loss of affordability in housing and other necessities or amenities will impact these residents.**
- **Gen Z and Millennials see the need for more housing and want housing development to speed up. To retain these emerging generations, it is critically important to create livable communities with affordable housing and access to transportation.**
- **Gen Z and Millennials are the most concerned age demographic about the natural environment and most oriented towards taking action to improve it.**
- **Gen Z and Millennials want public investment in things like civic amenities, public transportation, neighborhood improvements, and the environment.**

Below is more detail about each of these key take-aways.

Gen Z and Millennials are the most mobile and the least attached – the region will need to earn their continued engagement and connection.

We found a commonality across our polls that attachment to community tended to increase as respondents get older. For example, Gen Z and Millennial respondents noted less attachment in their communities compared to older generations with 56% agreeing that they “*felt a sense of pride and attachment*” compared to 68% of those 55+. Further, respondents aged 18-34 were the most likely to have moved in the last three years and the most likely to indicate that they will move in the next three years. **Younger generations are deciding where to build their community – what are their most important considerations that will keep them in the region?**

1. According to McKinsey & Company, “Millennial” includes those born 1980-1994 and “Gen Z” includes those born 1995-2010. In 2019, this translates overall to individuals aged 9 to 39. Nine to 24 year-olds are Gen Z and 25 to 39 year-olds are Millennials. In the polls that we have conducted, we have grouped and analyzed those aged 18-34 or those aged 18-38 into one category, depending on the poll. We have not collected data on those younger than 18.

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Across the board, all ages in the region agree that more affordable housing is needed. When thinking about the factors that most influence where they would want to live, Gen Z and Millennials are most likely to cite “it is an affordable place to live” (54%), “access to high quality jobs” (50%), and “affordable housing” (34%) as the most important factors. Their desire to have access to higher education, access to a variety of employment opportunities, and high quality public education were also noted at a higher frequency than other age groups.

Cost is a major consideration for Gen Z and Millennials. 18-38 year olds were more likely than other ages to cite cost as the most prohibitive factor influencing their decision to use public amenities, like museums or festivals. Cost is a motivating factor for using public transportation with younger generations more likely to use it because it is cheaper and it eliminates the need to pay for parking. They are also more likely to want policy-makers to create more affordable transit options (45% of 18-34 vs. 35% of older generations). Finally, Gen Z and Millennials who are not regularly taking action to improve the environment most frequently cite cost as their reason for inaction, as well as not knowing how.



Gen Z and Millennials see the need for more housing and want housing development to speed up. To retain these emerging generations, it is critically important to create livable communities with affordable housing and access to transportation.

What do you love about the region? “Good people, great location, lots to do.”

(quote from Millennial in the Livability Poll)

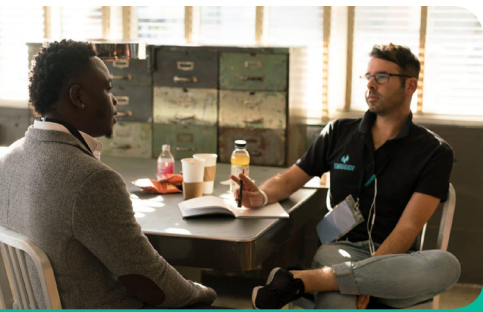
It is clear that Gen Z and Millennials support housing growth and value affordable housing. Consistent with other age categories, three out of four 18-38 year olds ranked

“providing quality housing for low to moderate income” as the top housing need in their community. This age group is most likely, compared to all other ages, to say that we need to speed up on building houses (57% of 18-38 say speed up compared to ~47% of older age groups). 18-38 year olds’ top choice for local government investment for job growth is to build affordable housing for workers (46% chose as the top out of eight choices). In an open-ended question, 18-38 year olds were most likely to cite homelessness, safety, or housing costs or supply as the most pressing problems in the region.

When thinking about the types of communities that Gen Z and Millennials want to live in, access to convenient public transportation and parking are more important for the younger generations than for others. Similar to other generations, Millennials and Gen Z are slightly more likely to want to live in a suburban environment compared to an urban environment (54% suburban versus 46% urban). Being able to afford a larger house is a characteristic that is particularly important to 18-38 year olds. Millennials home preferences are important to note as they are currently moving into their peak home-buying years². Recent research has suggested that Millennials are the “back to the city” generation, preferring to live downtown compared to suburbs. However, the reality is more complicated. CityLab research suggest that characteristics such as the decline of marriage rates, higher educational attainment, and the diversification of younger generations impact housing trends, pushing portions of these generations toward both the city and the suburbs (but not so much towards rural areas)³. According to our Livability Poll, in the Capital region, these generations are split fairly evenly in their preference for urban or suburban, but it is clear that even in the suburbs, Gen Z and Millennials want affordable housing options, walkable shopping and other amenities, and accessible public transportation.

2. Goldman Sachs, 2019. “Millennials: Coming of Age.” <https://www.goldmansachs.com/insights/archive/millennials/>

3. CityLab, July 30, 2018. “Do Millennials Prefer Cities or Suburbs? Maybe Both.” <https://www.citylab.com/equity/2018/07/will-millennials-stay-downtown/566078/>



Gen Z and Millennials are the most concerned age demographic about the natural environment and most oriented towards taking action to improve it.

Gen Z and Millennial respondents more frequently say that taking environmental action is good for the economy.

Gen Z and Millennials are fluent in environmental sustainability issues and are more likely than other age groups to perceive climate change or other environmental problems, like air, soil, and water quality, as serious and threatening

problems. 93% of Gen Z or Millennials think that humans contribute to climate change. 18-38 year olds are more likely to be very or extremely concerned about future impacts of climate risk, noting concerns about wildfire, smoke from wildfire, flooding, and hotter temperatures at a higher rate than other age groups. Additionally, 18-38 year olds believe that climate change is a threat to economic vitality, public infrastructure, well-being of future generations, homes and property values, public health and safety more intensely than other age groups (89% of 18-38 year olds are concerned about at least one of these issues compared to 74% or less of other age groups). The younger generations are also less likely to see environmental action as a threat to the economy and job growth. In fact, those 18-38 are almost twice as likely as those 55+ to say that doing things to reduce climate change will result in more jobs (59% of 18-38 compared to 32% of 55+). Gen Z and Millennials are also two to four times as likely as other ages to say that air pollution is a more serious health threat in lower-income areas (62% of 18-38 versus 26% or less of older generations), suggesting that this age group perceives that there are environmental justice issues in the region, and draws connections between the environment and public health.

Gen Z and Millennials want action and increased public investment in things like civic amenities, public transportation, neighborhood improvements, and the environment.

Gen Z and Millennials typically support personal and public investments in community infrastructure at a higher frequency than other age groups. 18-38 year olds are more likely to say that they'd pay more taxes for transportation improvements, civic amenities, renewable energy, and annual taxes for cleaning the environment and taking action against climate change.

Additionally, Gen Z and Millennials want more government intervention to maintain or create public infrastructure. 95% of Gen Z and Millennials support a moderate to strong role for local government in public investment in civic amenities, compared to 89% or less for older generations. Strikingly, 51% of Gen Z and Millennials say that “*state and local government intervention should do whatever it takes to protect the environment*”, regardless of the impact on jobs, compared with 40% or less for other generations. Additionally, Gen Z and Millennials are much more likely to say that environmental regulations are beneficial to California’s quality of life and economic prosperity compared to other age categories. Finally, Gen Z and Millennials are more likely to use and support public infrastructure like public transportation. Gen Z and Millennials are also more open to using public transit, with only 4% saying that “*there are no improvements that would cause me to use public transportation*” compared to 13% of older generations.



Conclusion:

Gen Z and Millennials will increasingly hold today's decision-makers accountable for equitable, prosperous, and sustainable communities of the future.

Gen Z and Millennials collectively represent about 134 million people nationwide, with Millennials making up the largest living adult population, surpassing Baby Boomers this year⁴. Although these generations are just emerging or are not fully in positions of power, they are already very influential, with significant purchasing power and community influence through activism and technology. These generations have the power to shape culture and will increasingly have the power to shape communities, policies, and actions.

Additionally, we are in the midst of a major societal transformation. In the next 20 years we will likely see major changes in transportation and mobility (autonomous vehicles with less dependency on car ownership), work (more job mobility and technology disruption), and demographics (the nation is becoming more diverse). We also face big challenges. Economically, we are at risk of increasing income disparity, we face more serious environmental challenges than ever before, and socially we still struggle for equal treatment and opportunity for all. As these changes take place, it is critical that we listen to the views of our youngest generations to understand how to support communities of the future.

Our public opinion polling provides insights into the views of the youngest generations in the Capital region. Responses to our polls show that Gen Z and Millennials have a strong degree of conviction about their beliefs. For example, over 90% of Gen Z and Millennials care deeply about and are very concerned about most aspects of the sustainability of our environment. Gen Z and Millennials seem to care, with more frequency and intensity, about some of the core components of a healthy community, such as recognizing the need for affordable housing, holding a desire for equitable education and economic opportunity, demanding a clean and sustainable environment, and asking for accessible public transportation. Through these polls, these generations are sending a signal that future generations are counting on today's decision-makers to create equitable, sustainable, and prosperous communities. Decision-makers should pay close attention to these signals – our future depends on it.

4. Pew Research Center. March 1, 2018. "Millennials projected to overtake Baby Boomers as America's largest generation."
<https://www.pewresearch.org/fact-tank/2018/03/01/millennials-overtake-baby-boomers/>



About the Polling Data

The data cited here is from four public opinion surveys that were conducted from June 2017 to May 2019. Polling data has been weighted and is representative of the region as a whole, with margins of error +/-5% or below. The polls cited include:

Regional Attitudes about Civic Amenities

Release Date: June 2017 | 796 Respondents | +/- 5% margin of error

Geography: Sacramento County and specific zips in Yolo, Placer, and El Dorado counties

Regional Attitudes about Transportation

Release Date: January 2018 | 788 respondents | +/- 5% margin of error

Geography: Sacramento County with specific zips in Yolo, Placer, El Dorado, San Joaquin, Solano, Sutter and Yuba

The Livability Poll

Release Date: November 2018 | 960 respondents | +/-3% margin of error

Geography: Sacramento, Yolo, Placer, El Dorado, San Joaquin, Solano, Sutter, and Yuba

Regional Attitudes about the Environment

The Environmental Poll

May 2019 | 985 respondents | +/-3% margin of error

Geography: Sacramento, Yolo, Placer, El Dorado, San Joaquin, Solano, Sutter, and Yuba

All four polls can be found at: <https://valleyvision.org/our-research/public-opinion-polling/>