

Residential Experience IndexSM

53% of a person's satisfaction with their home can be explained by factors inside the unit.

Neighborhood factors 13%

Non-unit building factors 3%

What makes a great living experience?

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In our research, the Gensler Research Institute sought a better understanding of what elements drive positive living experiences. We also hoped to identify what residents would likely prefer and prioritize in the future—particularly among those in multifamily housing. To investigate these questions, we surveyed over 13,000 residents across nine diverse markets: Atlanta, Austin, Chicago, Dallas, London, New York, San Francisco, Seattle, and Singapore. Our results point to a need for fresh perspectives on residential design and development, and to challenge norms and raise the bar for the residential experience.

Centering the needs and desires of residents in our approach is crucial. Major decisions in many residential projects—from unit size and mix to amenity offerings and parking—too often rely upon anecdotal evidence, retrospective data, or a status quo approach. This focus on standard practices and predictability has resulted in a growing “sameness” of new residential development; and the lack of contextual and innovative solutions only spurs more resistance to new development by local communities. Our own data corroborates this, showing surprisingly consistent residential experiences across markets, despite variations in climate, culture, and development histories.

To that end, this research seeks to put the residents’ point of view at the center of our data-driven approach to residential design and strategy, helping key stakeholders in the development and design process. Ultimately, our goal is to create housing that is more satisfactory, affordable, and supportive, and that allows for better engagement with residents’ neighbors and communities.

The future of urban living is tied to complex economic and social shifts underway.

The residential experience is often downstream of market-level trends. Problems of affordability permeate all markets—but the momentum of rent growth and current rent levels differ and may influence how residents experience neighborhood change. In the U.S., multifamily rents in San Francisco are nearly double what they are in Austin, Texas—but Austin is experiencing some of the highest year-over-year rent growth measured. New factors, such as a dramatic rise in working from home during the pandemic, and the expected widespread shift toward hybrid models thereafter, are also influencing how people think about and decide where to live.

3x

Lower-income respondents are three times as likely to say they have no choice but to stay where they currently live compared to higher-income respondents (as defined by AMI, see glossary).

13%

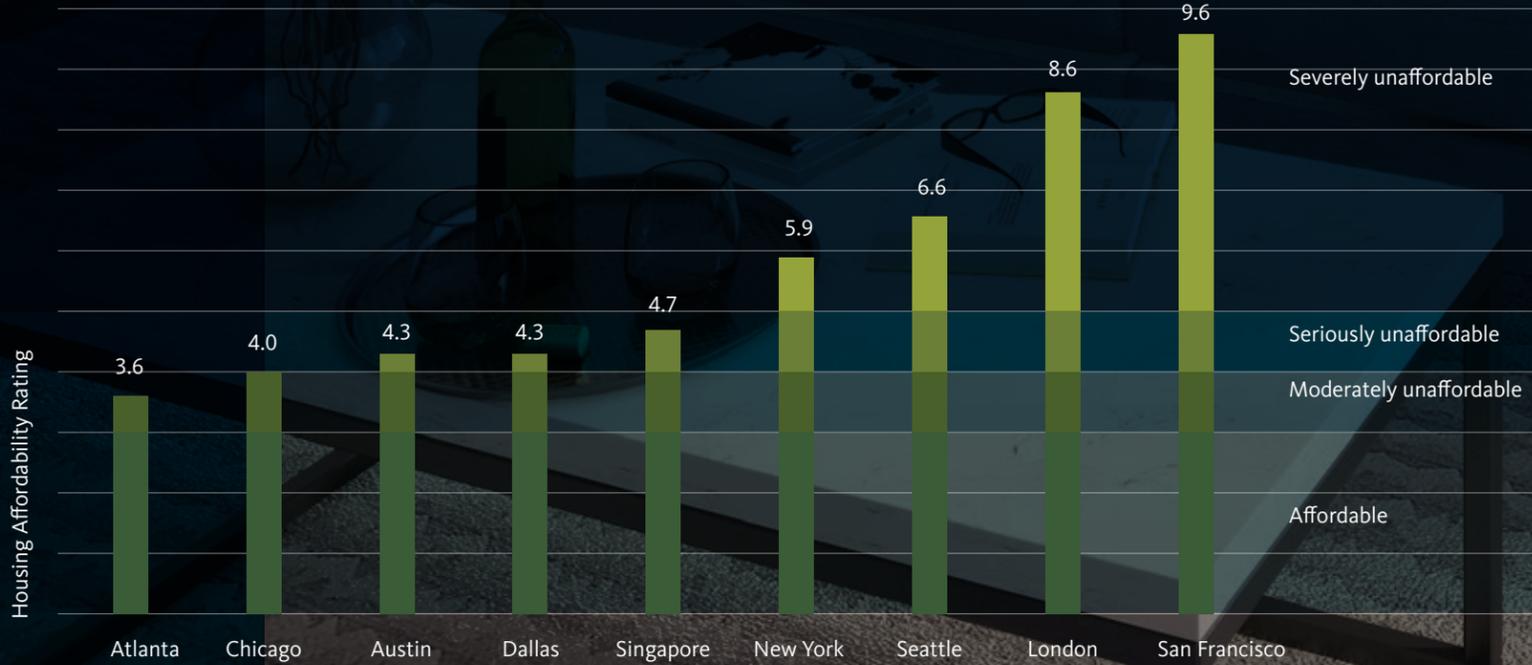
Only 13% of Londoners agree that it is easy to find good housing at a reasonable price in their city.

Source: Perception Survey on QoL in European Cities, European Commission



ALL MARKETS SURVEYED ARE EXPERIENCING CHALLENGES WITH HOUSING AFFORDABILITY.

Data represents housing affordability ratings for 2020 Q3 (September). Housing affordability rating uses the "median multiple"—the ratio of median house price to gross median household income—to indicate a market's middle-income affordability. Using median helps mitigate the influences of extremely high incomes and/or luxury housing.



Source: Data extracted from 2021 Demographia International Housing Affordability Report, Authored by Wendell Cox, Urban Reform Institute, Published February 2021.

Today's housing decisions are primarily driven by affordability, quality, and space.

The decision-making process in choosing where to live is surprisingly stable: affordability, quality, and spaciousness are the top factors, with little variation by market or demographic group. Addressing these synergistic, but also competing, factor may require a balancing act—and an understanding of the right trade-offs to optimize the residential experience while managing growing issues of housing affordability.

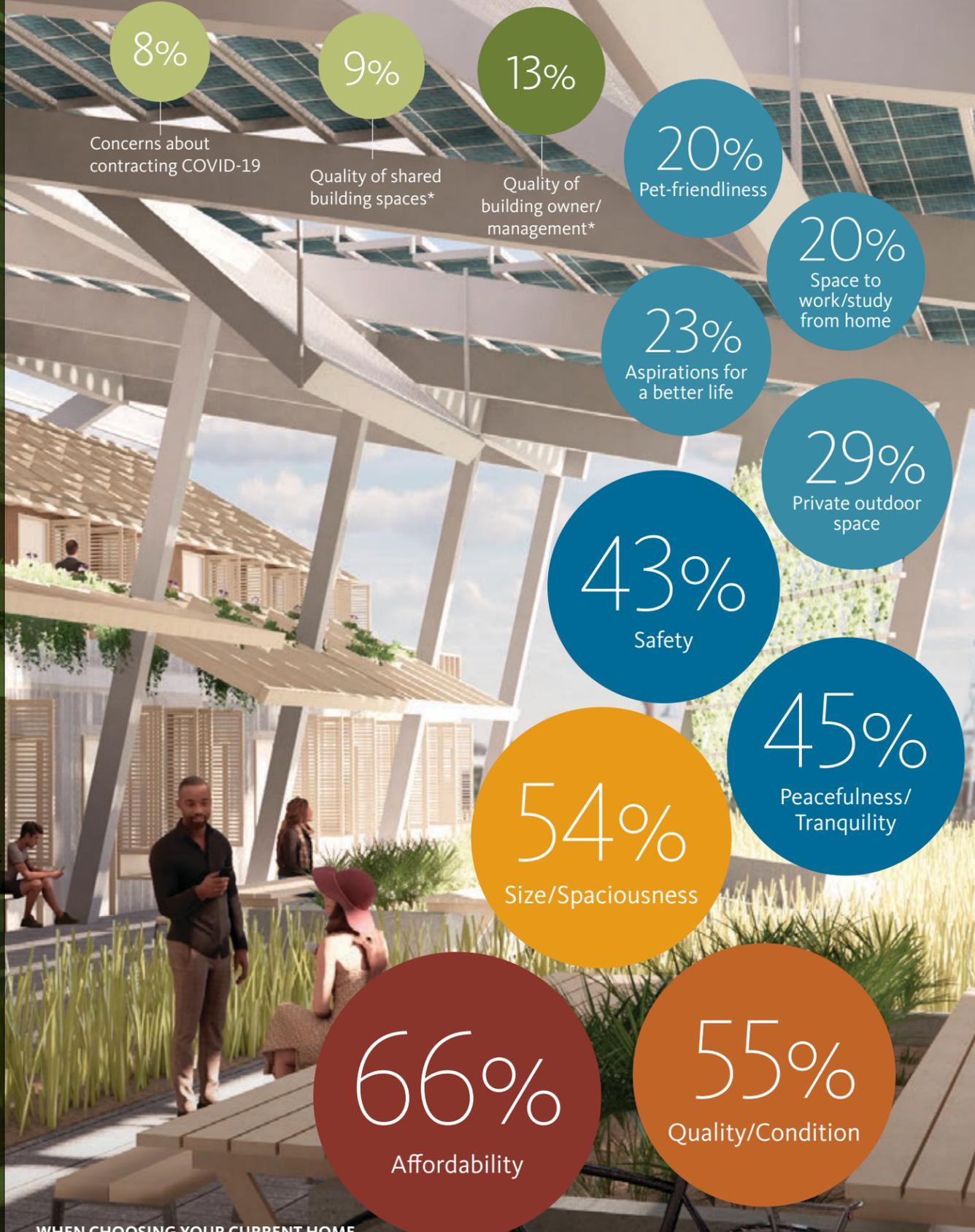
38%

of respondents in Gensler's most recent City Pulse survey—representing residents of 15 global cities—reported they were likely to move in the near future.

84%

The vast majority—84%—of recent permanent moves within the United States were within the same central metro area.

Source: USPS, U.S. Census Bureau



WHEN CHOOSING YOUR CURRENT HOME, WHAT WERE YOUR TOP CONSIDERATIONS?

The percentage of respondents who noted each factor within their top five reasons to move to their current residence.

*Represent multifamily respondents only.



To balance the needs of affordability, quality, and space, it's time to rethink our approach to residential design.

Focus on unit design to optimize home satisfaction.



What matters most to home satisfaction—the unit, the building, or the neighborhood? Our analysis found that unit-level elements make an outsized contribution.

We explored the relative impacts that unit, building, and neighborhood factors have on overall home satisfaction. Statistically, someone's assessment of their personal living space is the largest contributor by far. When we tested multifamily respondents' appetites for a variety of potential cost-saving solutions, they were most averse to sacrificing in-unit

features and personal space—even in exchange for a rent reduction.

A unit's design also weighs heavily in the equation. While the size and spaciousness of a home are also significant contributors to satisfaction, 6 in 10 would still prefer a well-built, well-designed unit that is less spacious over a more spacious, but poorly designed unit.

UNIT FACTORS MAKE THE BIGGEST IMPACT ON OVERALL HOME SATISFACTION.

The proportion of variance (R^2) in overall home satisfaction accounted for by multifamily respondents' assessment of their residential environment across unit, building, and neighborhood factors (see glossary).



69% of overall home satisfaction is explained by the residential environment.

Innovative solutions for storage, layout, and noise may meaningfully improve satisfaction.

Unit features matter most to satisfaction, so we assessed how the quality of each unit feature or attribute varies by either low or high levels of unit satisfaction. The gaps between these two groups are illuminating. The elements with larger gaps—as shown in bottom chart at right—signify where we should first focus to boost satisfaction for residents.

Lack of flexibility is the top pain point among those with poor unit layouts. Creative unit layouts may help offset constraints around

affordability. Further, improved storage solutions (especially in the bedroom and kitchen) are a top demand among multifamily residents.

We also asked respondents directly what factors are most important for a place to “feel like home.” Comfort, security, and peacefulness topped the list. Noise can shape attitudes about long-term livability and neighborhood quality. Of the respondents, 33% say they will prioritize the peacefulness of their home in their next move.

UNITS SHOULD PRIORITIZE THE RESIDENTS' COMFORT, SECURITY, AND TRANQUILITY.

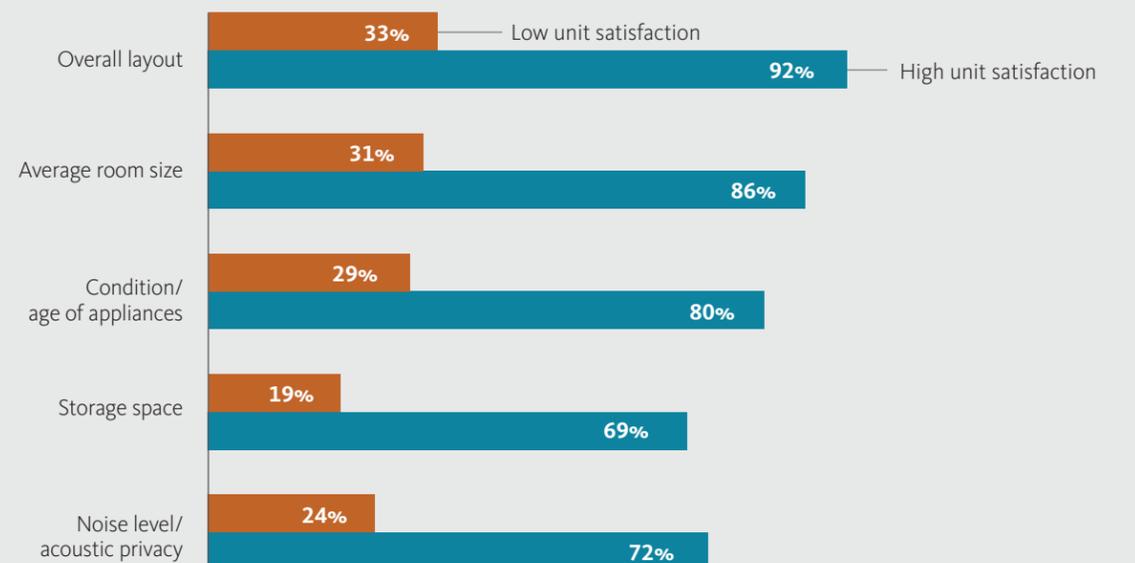
Average rank order of the qualities that respondents feel are most important for a place to feel like home, with “comfortable” being the most important.

1	Comfortable	5	Functional
2	Secure	6	Spacious for everyone
3	Peaceful	7	Updated
4	Private	8	Social



THE LARGEST GAPS IN SATISFACTION HELP IDENTIFY WHICH ATTRIBUTES TO INNOVATE FIRST.

The percentage of multifamily respondents within low and high unit satisfaction groups who highly rated each unit design attribute. Below graph shows the five attributes with the largest differences between satisfaction groups, among a total list of 13 attributes.



Supporting the ability to work from home benefits all residents.

For millions of people, working from home is the new normal. Developers are now tasked with reconsidering layouts, creating new areas where people can quietly and effectively do work each day. The elements that are most important to those who work from home—a strong internet connection, quiet, and privacy—are also features that everyone would want.

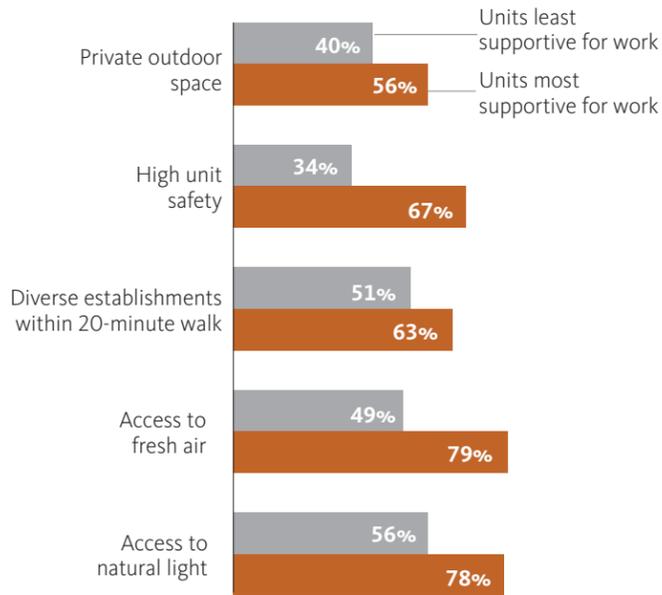
In addition, our data suggests that prioritizing occupant well-being is a boon to working from home. Residents who say their units provide access to fresh air, natural light, safety, and

proximal establishments are far more likely to say their units support working from home.

Importantly, supporting working from home does not always mean a dedicated space or office. In fact, only 39% of multifamily respondents whose homes support working from home have a dedicated work area. Dedicated home offices are even more rare, with only 10% of multifamily residents surveyed reporting they have one. That means that many of the best home work spaces double for other uses.

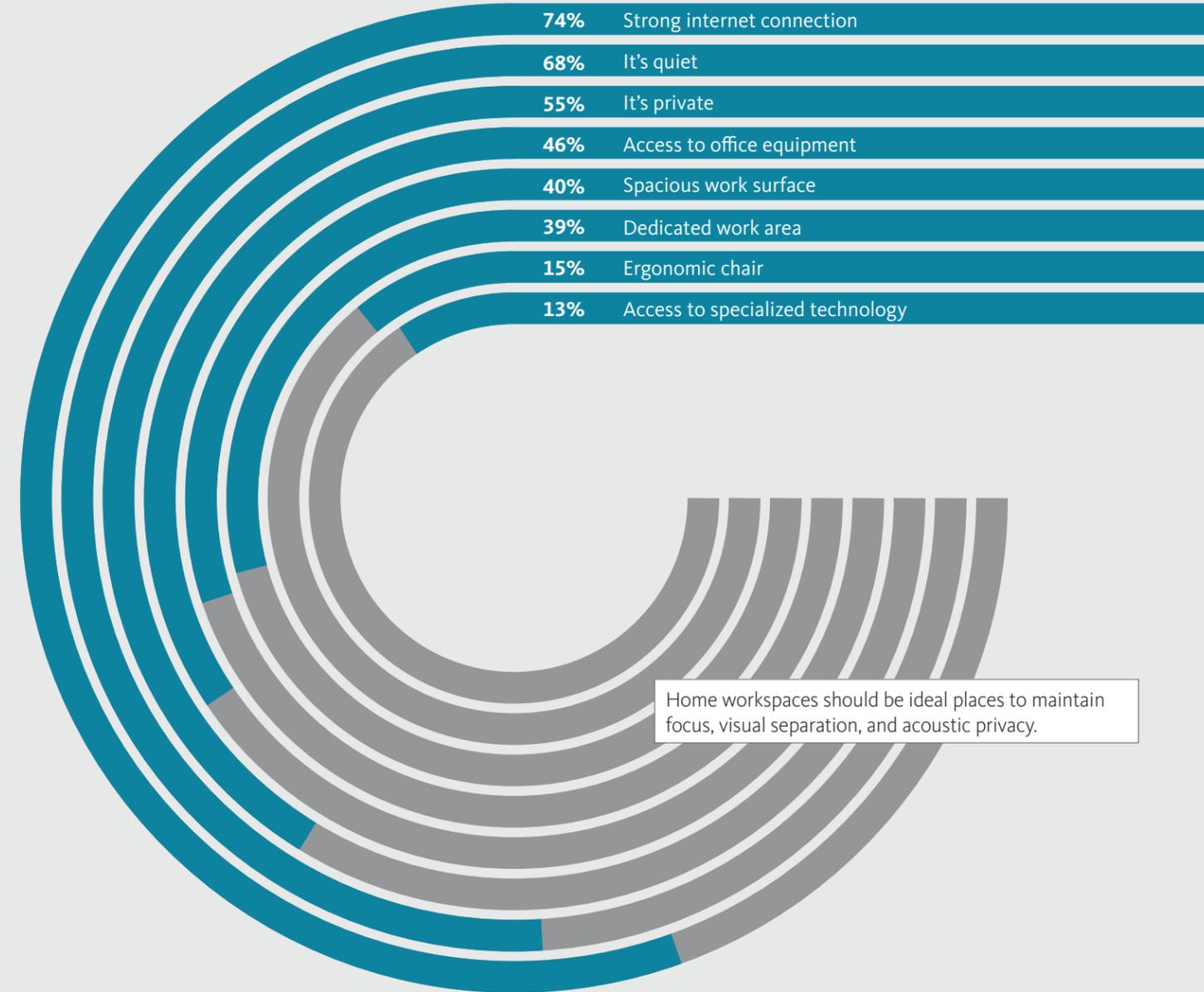
SUPPORT FOR WELL-BEING SUPPORTS WORKING FROM HOME.

The percentage of multifamily respondents who have each unit feature or attribute, segmented by how supportive their units are for working from home.



THE MOST IMPORTANT ELEMENTS OF AN OPTIMAL HOME WORKSPACE ARE CONNECTIVITY, QUIET, AND PRIVACY.

Among multifamily respondents who rated their unit's support for work highly, the percentage who selected each reason. Respondents could select multiple.



Home workspaces should be ideal places to maintain focus, visual separation, and acoustic privacy.

Residents and developers alike have opportunities to cut down on costs by paring back on amenities.



Multifamily renters are highly open to forgoing many amenities if it means an opportunity to cut costs.

Amenities may be the marketing elements that get prospective residents through the door, but they are also the spaces that residents would most consider eliminating for a rent reduction. Under a paradigm where residents think rents are out of control and developers need to cut down on expenses, targeting the areas that are least valued is a starting point for reimagining ways to provide value to residents.

As a common theme, spaces outside the unit are most popular for elimination. This includes both indoor and outdoor spaces. Our analysis did not find any significant differences between income groups with regards to removing existing amenities. Across all markets, most residents are not open to shared living room or kitchen scenarios, strategies often employed as part of “co-living” environments (see glossary). For those open to these solutions, they tend to be for the social versus cost-saving benefits.

RESIDENTS PLACE A HIGHER VALUE ON UNIT FEATURES AND PERSONAL SPACE THAN ON COMMON AMENITY AREAS.

Among multifamily, renter respondents, their willingness to consider each scenario in exchange for a certain rent reduction, calculated based on their disclosed monthly rent.

	Would consider for no rent reduction	Would consider for 10% or 20% rent reduction	Would consider for 30%+ rent reduction	Would never consider this
Remove indoor multipurpose amenity spaces*	13%	41%	25%	21%
Remove outdoor multipurpose amenity spaces*	10%	41%	23%	26%
Reduce unit size, but maintain current number of rooms	6%	29%	27%	38%
Give up in-unit laundry and use a common laundry room*	5%	21%	24%	50%
Transform unit to have a fully interior bedroom	7%	21%	21%	51%
Share a communal living or lounge room with 5 other units	7%	11%	12%	70%
Share a fully furnished, communal kitchen with 5 other units	7%	10%	12%	71%

*Among respondents who currently have indoor amenity spaces, outdoor amenity spaces, or in-unit laundry.

Local practices, climate, and culture play a role in amenity expectations.

Some amenity spaces matter more depending on market. While there are universals, like parking, certain amenities make notable ranking jumps. Indoor and outdoor amenity spaces may matter less than unit elements, at least as far as overall home satisfaction goes, but the right amenities can have their place at the building level.

PARKING, GYMS, AND POOLS ARE TOP AMENITIES ACROSS MOST MARKETS.

The one shared amenity space that multifamily respondents would prioritize to have in their building by each market studied, ranked from most to least often selected.

RANK	Seattle	San Francisco	Chicago	Dallas	Austin	Atlanta	New York	London	Singapore
1	On-site resident parking	Gym/fitness center	Gym/fitness center	On-site resident parking	On-site resident parking	On-site resident parking	Shared laundry room	On-site resident parking	Pool
2	Gym/fitness center	On-site resident parking	On-site resident parking	Gym/fitness center	Pool	Gym/fitness center	Gym/fitness center	Gym/fitness center	Gym/fitness center
3	Pool	Pool	Shared laundry room	Pool	Gym/fitness center	Pool	On-site resident parking	Pool	Outdoor multipurpose space
4	Shared laundry room	Shared laundry room	Pool	Dog park	Visitor parking	Children's play area	Pool	Would prefer NO amenity space	On-site resident parking
5	Visitor parking	Would prefer NO amenity space	Outdoor multipurpose space	Visitor parking	Shared laundry room	Visitor parking	Outdoor multipurpose space	Outdoor multipurpose space	Indoor multipurpose space
6	Outdoor multipurpose space	Outdoor multipurpose space	Would prefer NO amenity space	Shared laundry room	Dog park	Indoor multipurpose space	Would prefer NO amenity space	Children's play area	Would prefer NO amenity space
7	Would prefer NO amenity space	Visitor parking	Visitor parking	Children's play area	Children's play area	Would prefer NO amenity space	Visitor parking	Indoor multipurpose space	Children's play area
8	Indoor multipurpose space	Dog park	Indoor multipurpose space	Would prefer NO amenity space	Indoor multipurpose space	Outdoor multipurpose space	Children's play area	Visitor parking	Visitor parking
9	Dog park	Indoor multipurpose space	Dog park	Indoor multipurpose space	Outdoor multipurpose space	Shared laundry room	Indoor multipurpose space	Shared laundry room	Dog park
10	Children's play area	Children's play area	Children's play area	Outdoor multipurpose space	Would prefer NO amenity space	Dog park	Dog park	Dog park	Shared laundry room

The neighborhood is also part of a building's amenity strategy—residents want community amenities nearby.

Walkability is key in all regions we studied. And walkability creates the tether between the residences where people live and neighborhood necessities and amenities. As buildings consider what amenities are most important to have on-site, understanding what residents prefer

to have nearby is an important part of that equation. Conveniences such as grocery stores, pharmacies, and restaurants, along with access to parks and green space, are strongly desired by residents—and an opportunity to offset services not delivered in the building.



IN TERMS OF CONVENIENCES, BASIC ACCESS TO FOOD AND NATURE ARE TOP PRIORITIES.

The percentage of respondents who selected each establishment type within their top five to have within a 20-minute walk from their current residence.

The role of the building should focus on attracting residents, and connecting to the neighborhood.



Where does the building itself play the biggest role? Driving attraction and recommendations for new residents.

Buildings should not be constructed independently of the surrounding neighborhood. While unit-level variables are key to driving residential experiences, building-level features—specifically the exterior design or façade and a well-maintained appearance—are among the strongest drivers of the likelihood of a resident

recommending their building as a place to live to others. One’s building communicates its synthesis with or antagonism to the surrounding neighborhood. That’s why residents who say their buildings connect well with the street level score higher on key building and community outcomes.

BUILDING AND NEIGHBORHOOD ATTRIBUTES ARE SOME OF THE STRONGEST DRIVERS OF RECOMMENDATION.

Results of a multiple linear regression that identified predictors of building Net Promoter Score (NPS—see glossary) across individual unit, building, and neighborhood measures. Listed variables represent the strongest model according to the proportion of variance (see glossary) in NPS (42%) that can be explained by these significant attributes. Attributes in bold represent the top 5 strongest drivers according to their standardized coefficients.

Unit Attributes	Building Attributes	Neighborhood Attributes
Good layout	Exterior design/ building façade	Beautiful
Acoustic privacy	Well-maintained	Safe at night
Updated	Well-connected to surrounding neighborhood	Well-priced
Private	Accessible for those with physical disabilities	
Storage space	Clean	
	Adequate parking	

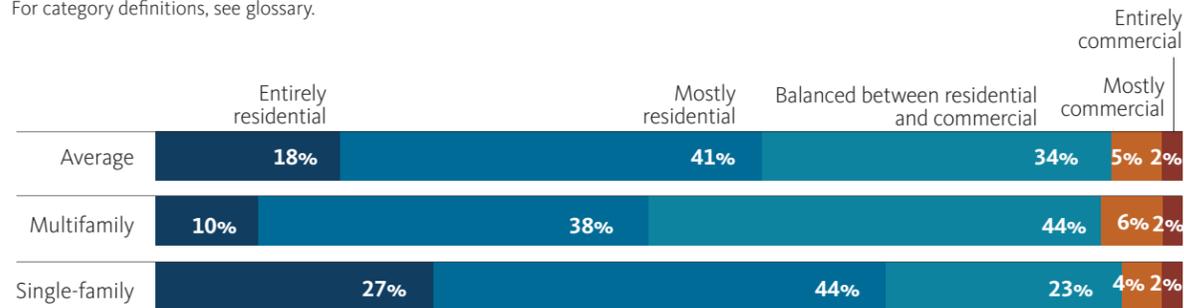
Variety and connection should drive residential building design—but without a commercial feel.

It's hard to pin down the exact preferred neighborhood composition, but our research shows a trend toward heterogeneity, space diversity, and convenience. Pew Research Center finds that many people have a “grass is always greener” mentality in choosing where to live. People feel mismatched with their surroundings, and our research shows the neighborhood elements that many prioritize. Ultimately,

residents want their neighborhoods to feel cohesive: individual buildings must cohere with the neighborhood, and residential buildings must cohere with commercial ones. Residents who say there is a great connection between their building and the streetscape have higher NPS scores, feel more confident in their ability to age in place, and rate neighborhood safety better.

MOST RESPONDENTS FAVOR PREDOMINANTLY RESIDENTIAL ENVIRONMENTS, BUT STILL WANT CONVENIENCES NEARBY.

The percentage of respondents who selected each answer as describing their ideal neighborhood by current housing type. For category definitions, see glossary.



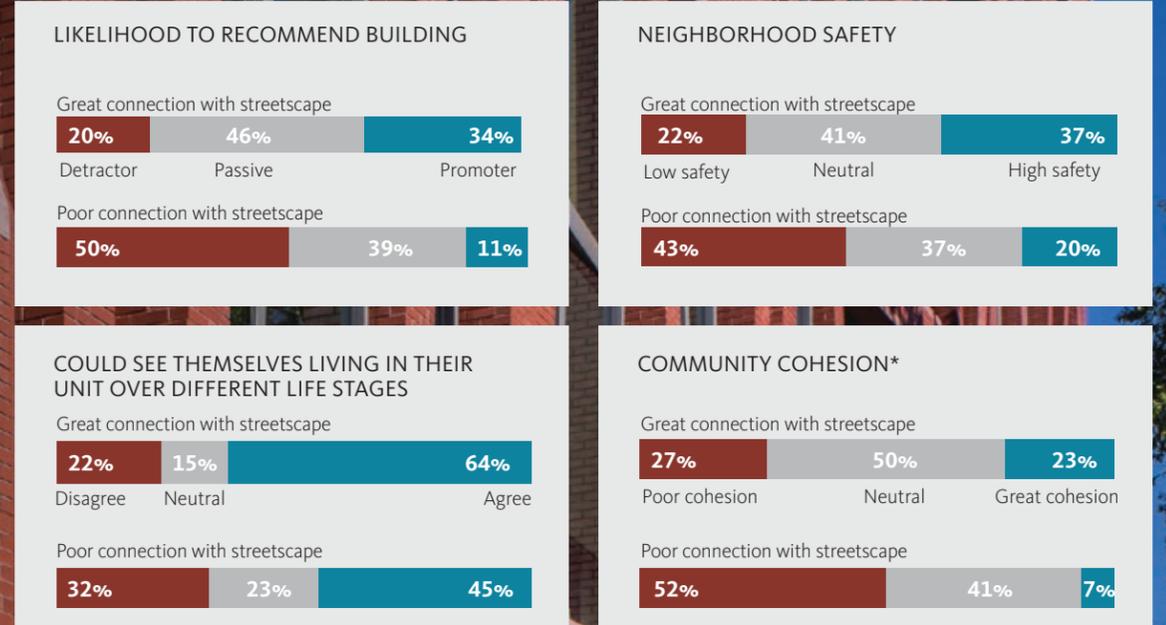
NEIGHBORHOOD CHARACTER IS VALUED, HOMOGENEITY IS NOT.

The percentage of respondents who selected each answer as describing their ideal neighborhood by current housing type.

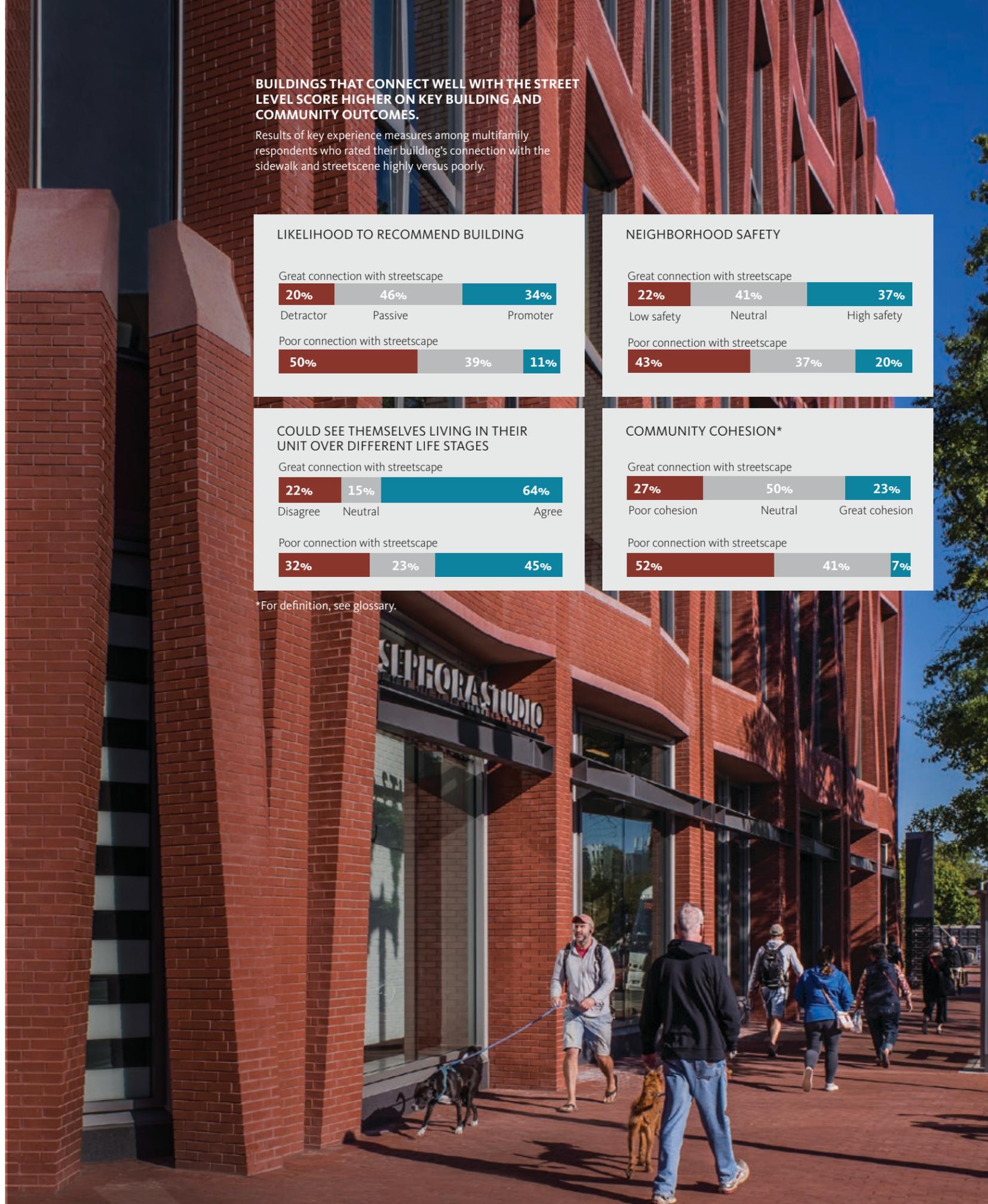


BUILDINGS THAT CONNECT WELL WITH THE STREET LEVEL SCORE HIGHER ON KEY BUILDING AND COMMUNITY OUTCOMES.

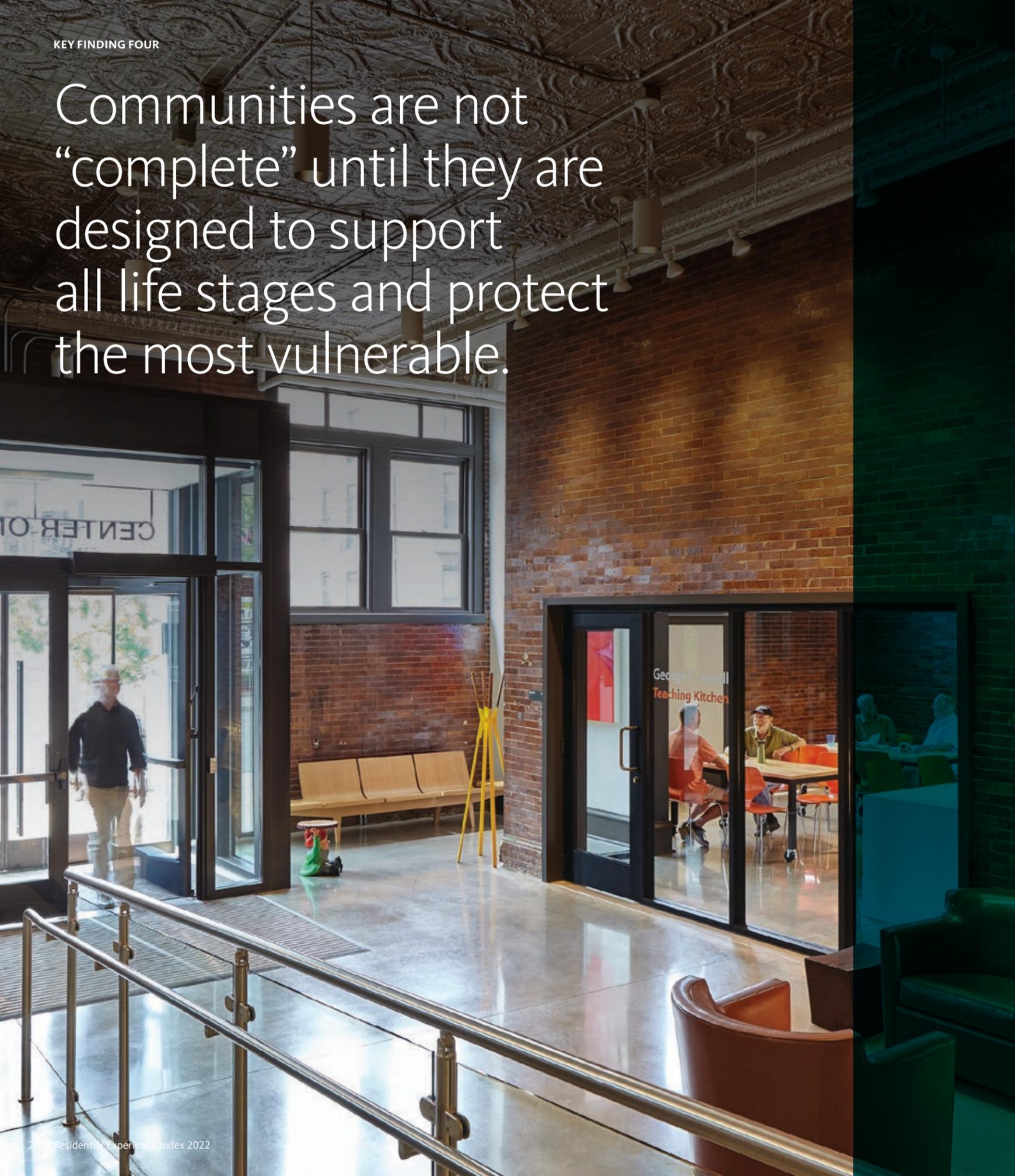
Results of key experience measures among multifamily respondents who rated their building's connection with the sidewalk and streetscape highly versus poorly.



*For definition, see glossary.



Communities are not “complete” until they are designed to support all life stages and protect the most vulnerable.



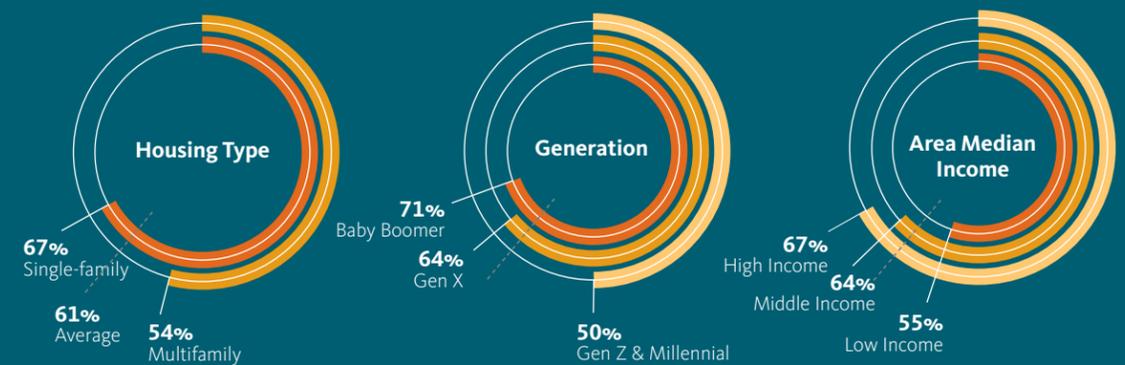
Currently, far too few people can live in their current home through all life stages.

The CDC describes “aging in place” as: “the ability to live in one’s own home and community safely, independently, and comfortably, regardless of age, income, or ability level.” We found that 61% of respondents perceive their current homes supportive for aging in place. Those who are in multifamily units,

younger, and have lower incomes are less likely to feel that they could age in place. Strategies for encouraging aging in place should not only focus on older adult residents but all life stages and circumstances, especially those that are inadequately supported by today’s units.

ONLY 6 IN 10 RESPONDENTS FIND THEIR CURRENT HOMES SUPPORTIVE FOR AGING IN PLACE.

Percentage of respondents per group who agree with the statement. For definitions of each segmentation group, see glossary.



I COULD SEE MYSELF LIVING WHERE I LIVE NOW OVER DIFFERENT STAGES OF MY LIFE.

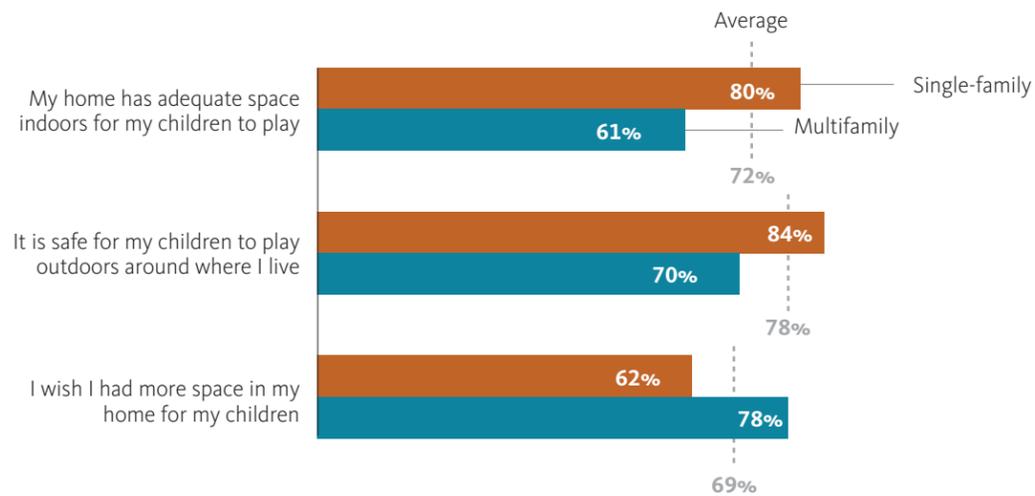
Parents often move because their location doesn't support their children's needs.

If parents feel their home doesn't provide for their children's needs, they often contemplate moving. Those in multifamily units are less likely than those in single-family homes to say their homes have adequate space for their children to play indoors and their neighborhoods feel safe for their children to play outside. Unit spaciousness and quality are important, and parents are looking to maximize how much quality space they can get at an affordable price. In fact, affordability beats out school quality and safety

in what parents are looking for in their next move. The average cost of supporting just one child is nearly \$14,000 per year, according to the Consumer Expenditures Survey by the U.S. Bureau of Labor Statistics. As home prices and rental rates rise across the United States, parents are first looking to what their family can afford. The percentage of parents who own single-family homes is dropping; developers must rethink how multifamily units can better support today's children.

MULTIFAMILY DWELLINGS AND THEIR SURROUNDINGS FALL BEHIND SINGLE-FAMILY SETTINGS IN THEIR SUPPORT FOR YOUNG CHILDREN.

The percentage of respondents who have children under 18 years old who agree with each statement by current housing type.



Those whose current homes are less supportive for their children (see glossary) are almost 2x as likely to move within the next 5 years than those living in more supportive homes.

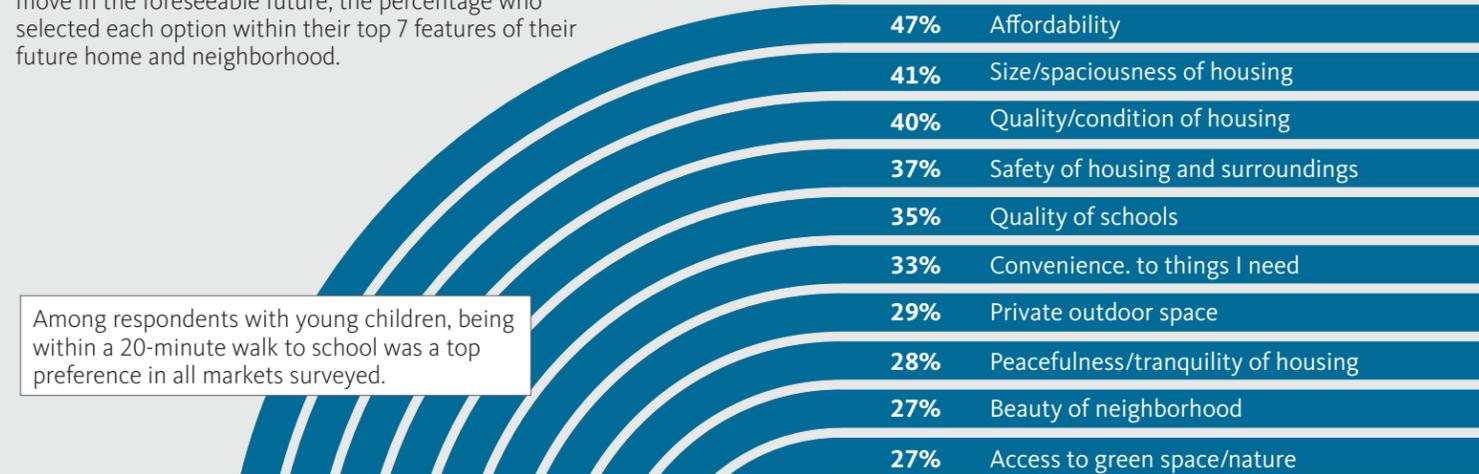
ALMOST HALF OF RESPONDENTS WITH YOUNGER CHILDREN INTEND TO MOVE WITHIN THE NEXT 4 YEARS.

The percentage of respondents with any children under 18 years old who selected each time frame regarding when they next plan to move.



THE FEATURES THAT PARENTS WILL LOOK FOR IN THEIR FUTURE HOMES ARE MOSTLY CONSISTENT WITH OTHER RESPONDENTS EXCEPT FOR ONE THING—GOOD SCHOOLS.

Among respondents with young children who plan to move in the foreseeable future, the percentage who selected each option within their top 7 features of their future home and neighborhood.



Among respondents with young children, being within a 20-minute walk to school was a top preference in all markets surveyed.

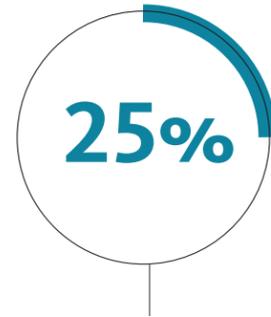
Many older adults lack supportive home environments.

Older adult respondents (over 55 years) want to stay in their homes as they age, but many don't think they can. Supportive home environments for these respondents include not only accessibility but also the social and networked infrastructure to ensure residents can age in place safely. Those who have supportive

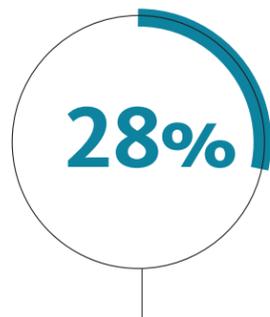
environments are more likely to say they have a positive building experience, access to social opportunities, and great community cohesion. Aging in place is as much about the built environment as it is about ensuring the right social networks are in place.



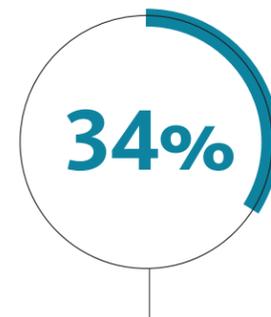
of older adults would like to stay in their current home as they age.



think their home would require specific modifications for them to be able to stay as they age.



fear they won't be able to stay in their current home as they age.



consider their current home adequately accessible for those with physical disabilities.



Compared to older adults whose current homes are less supportive, those whose current homes are highly supportive of independent living* as they age...

1.7x as likely to feel safe in their neighborhoods.

1/4 as likely to feel vulnerable to displacement and exclusion.

2/5 as likely to feel that their neighborhoods lack social opportunities.

1.9x as likely to live in a neighborhood with great community cohesion.

2.5x as likely to have great building experiences.

*For definition, see glossary.

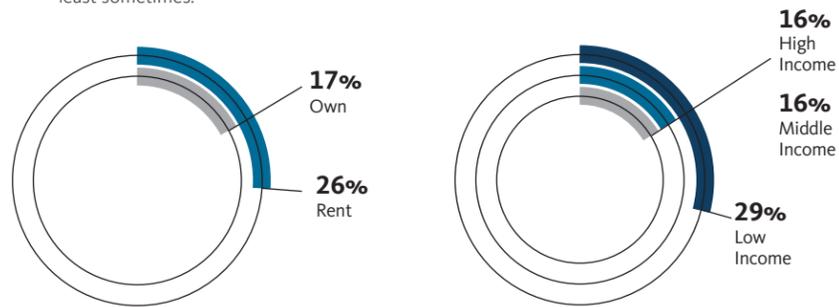
Lower-income residents are particularly vulnerable, struggling not only with affordability but with experience.

Nearly half of residents think that the housing around them is unaffordable. And this sentiment changes little across income groups in different cities sampled in our survey. That 45% of residents also have concerns about getting priced out of their neighborhood does indicate that concerns about housing affordability are getting worse.

Those who are most vulnerable also have poorer residential experiences, as housing vulnerability is linked with the quality of unit, building, and neighborhood elements. Community cohesion also varies with vulnerability. Those who are the least likely to feel threatened by affordability report the highest levels of community cohesion.

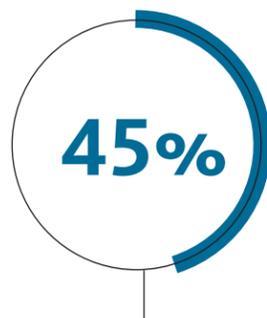
ALMOST 1 IN 4 RESIDENTS HAVE TROUBLE MAKING THEIR MONTHLY HOUSING PAYMENTS—RENTERS AND THOSE WITH LOWER INCOMES ARE STRUGGLING THE MOST.

The percentage of respondents within each group who say that making their monthly rent or mortgage payments is a problem at least sometimes.

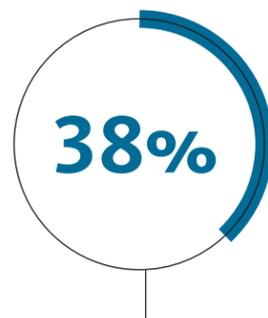


A LARGE PORTION OF PEOPLE SEE THEIR NEIGHBORHOODS AS UNAFFORDABLE OR OVERPRICED.

The percentage of respondents who agree with each statement.



think that the housing around them is unaffordable.



think that there aren't any housing options in their market that are both affordable and adequate.

Respondents across all income bands have similar concerns about affordability.

RESIDENTS MOST CONCERNED WITH AFFORDABILITY AND INCLUSION ARE ALSO HAVING MORE NEGATIVE EXPERIENCES.

Among respondents who fall within the top (great) and bottom (poor) quartiles of Housing Vulnerability (see glossary), the percentage of respondents who fall within the bottom quartiles, interquartile ranges, and top quartiles for Unit, Building, and Neighborhood Experience, and Community Cohesion factors.



To address the need for more housing, we must confront NIMBYism* and barriers to new development.

Negative perceptions of new development and its impact on neighborhood character must be confronted.

One-third of residents in our study do not want any new housing built in their neighborhood, and over half believe that maintaining character is more important than building new housing.

Strikingly, both of these percentages are higher than the 1 in 4 respondents who don't want

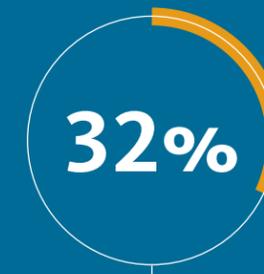
"affordable" housing in their neighborhood, suggesting that while some residents are resistant to affordable housing, a broader resistance to new development and concerns about its potential impacts on a neighborhood are the primary culprits behind resistance to new development.

CONCERNS AROUND NEIGHBORHOOD CHARACTER DRIVE RESISTANCE TO NEW HOUSING.

The percentage of respondents who agree with each statement.



think that maintaining neighborhood character is more important than building new housing.



don't want any new housing built in their neighborhoods, regardless of price.



don't want affordable housing in their neighborhoods.

A majority of respondents say maintaining neighborhood character is important, but smaller minorities don't want any new housing built.

*For definition of NIMBYism, see glossary.

Resistance to development transcends demographic groups, but owners and higher-income residents are the most adamant.

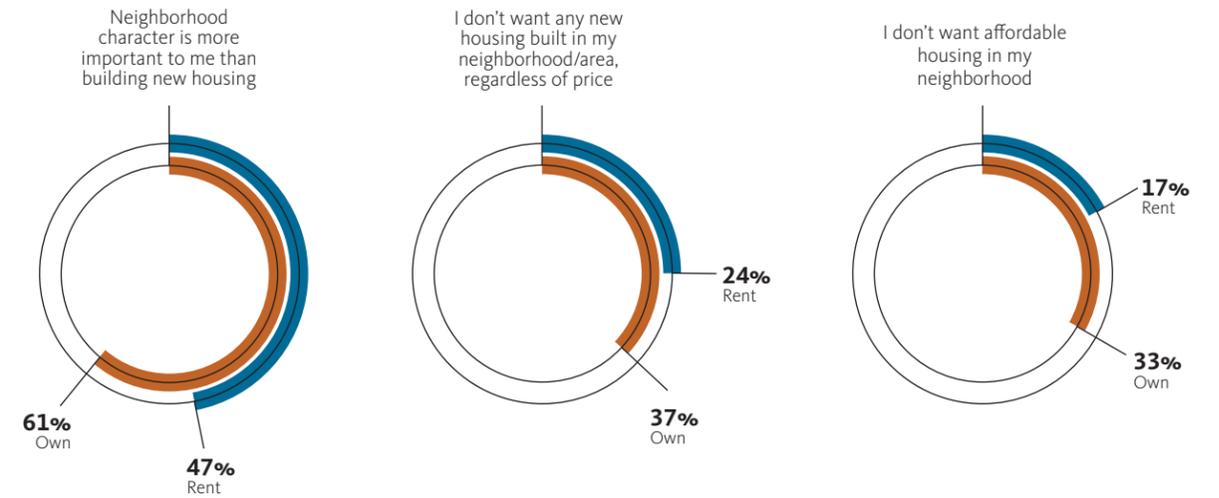
Negative feelings toward new construction transcends income classes: those in higher-income brackets may believe that new construction would impact property values; lower-income residents may think new construction is not for them. Those who own homes are significantly more resistant to new housing than renters, meaning the concerns of this cohort—from property values to public

safety to crowding—challenge the likelihood of new construction.

New residential development must combat these forces by addressing the issue of character head on. If existing residents begin to see new buildings as positive contributions to their neighborhoods, sentiment could shift.

RENTERS ARE MORE OPEN TO NEW AND AFFORDABLE DEVELOPMENT.

The percentage of owner and renter respondents who agree with each statement.



HIGHER-INCOME RESIDENTS ARE MORE LIKELY TO HOLD NEGATIVE OPINIONS AGAINST NEW AND AFFORDABLE HOUSING IN THEIR NEIGHBORHOODS.

Percentage of respondents in each AMI group who agree with each statement.



As we address neighborhood resistance, we should also focus on fostering community cohesion.

Of the multifamily respondents, 82% rate “feeling a sense of community” in their building as important. Community can be constructed at the building and neighborhood levels and is impacted by the social relationships that transcend these scales. Community is contingent on interpersonal relationships between community members. Its core elements are trust, respect, and shared purpose among neighbors.

Although the variables that foster community cohesion depend on the relationships between people, the built environment plays a key role in its development. We must help build community in residential environments where it is desired and lacking, and help maintain and strengthen community in environments where it already exists.

HOW DO WE DEFINE COMMUNITY COHESION?

Community cohesion scale is comprised of nine interrelated variables with a good internal consistency ($\alpha = 0.896$). For more detail, see glossary.



Those who feel strong community cohesion with their neighbors are 2x as likely to feel that they could age in place and 5x as likely to recommend their building to others.

BALANCED DESIGN AND FEELINGS OF OWNERSHIP CAN POSITIVELY IMPACT COMMUNITY.

The percentage of respondents within each group who have low, middle, and high community cohesion scores.

OWNERSHIP	Low cohesion	Neutral	High cohesion
Own	17%	49%	34%
Rent	39%	46%	15%
BUILDING SCALE			
<10 units	32%	47%	21%
10–49 units	31%	46%	23%
50+ units	40%	48%	12%
BUILDING TYPOLOGY			
Duplex, triplex, quadplex, and bungalow/cottage court	34%	44%	22%
Courtyard building any height	28%	43%	29%
Apartment building 2–4 stories	42%	43%	15%
Apartment building 5–9 stories	35%	48%	17%
Tower 10+ stories	32%	56%	12%
Single-family	17%	49%	34%



Recenter the unit through the lens of ever-evolving, inclusive living.

It is within the unit that residents spend most of their time—the focus of new design solutions should reflect this reality. Design and development have given weight to amenities in recent history, with “amenity arms races” becoming the norm. But a focus on amenities has left units ready for new, innovative thinking. Our research suggests that aspects of the unit also contribute significantly more to overall home satisfaction than building or neighborhood attributes. The benefits of a renewed focus on the unit are twofold: it can provide more satisfying, longer-term living solutions for residents; and drive leasing rates, retention, and ultimately revenue.

To respond to this challenge, we must define new unit typologies that better respond to the diversity in residents’ everyday lives. Consistent with Gensler’s ongoing body of experience research, our data suggests that living environments that support a variety of activities and behaviors yield better experiences. The COVID-19 pandemic has led residents to place an even greater value on personal space; we

must create units that optimize design and flexibility without sacrificing their affordability, another crucial and growing concern.

Configuring units that could easily morph to support different life stages and shifting lifestyle needs would also better empower residents to age in place and result in more intergenerational, diverse communities. Strategies to improve these elements would naturally also increase support for working from home, which many working residents expect to do regularly in the future.

This level of customization is now more possible than ever. Developers should deeply understand their audiences’ specific needs and aspirations to tailor their unit offerings. The growing demand for customization must be balanced with the need for standardization, which helps keep construction costs in check. For example, creating spaces within units that are flexible enough to support a variety of predesigned buildings, as illustrated to the right.

Achieving these solutions within smaller footprints—crucial to maintaining affordability—makes the importance of great design even greater. As space gets tighter, especially in markets with higher densities, we must find ways to make living environments still feel spacious. Spaciousness does not always mean openness; efficient unit plans can also produce more rooms within the same square footage. A shift in focus from offering spaciousness to more distinct areas or spaces may allow for more adaptability and longer-term livability, while keeping costs down for residents. Our research suggests that design solutions that address poor layouts and inadequate storage have a significant impact on the overall unit experience, and how spacious a

unit feels; increasing access to light and air has similar effects.

Great unit design can also improve residents’ relationships to their neighbors and neighborhoods. Our analysis found a high correlation between acoustic privacy and residents’ perceptions of not only their unit but of their surrounding neighborhood. Enhanced soundproofing—between and within units—is a crucial step, achieved by designing rental units to a condominium spec for acoustic assemblies, such as double stud demising walls in lieu of staggered stud walls and improved exterior glazing assemblies.



Implement amenity strategies that complement, connect with, and serve the neighborhood.

Building amenities have often stolen the limelight in residential design, development strategy, and market positioning. Our research suggests that amenities often help attract residents to a building but may not be the main contributor to their long-term satisfaction. A design strategy that finds the right balance between the unit and common spaces is key.

Amenities can play a key role in creating more engaging resident experiences, but only

if they are well-activated. No one wants to subsidize the barely used business center. When considering the approach to offerings beyond the unit, a comprehensive strategy should include amenities, programming, and service—addressing not just the spaces, but the activities they support. Programming and hospitality-level services can engage residents beyond prescriptive amenities and allow operators to quickly pivot flexible spaces as market-specific

needs and desires among residents shift, as well as offer activities and experiences for a variety of age groups living within the same project. Soft programming is low risk, high reward, and typically does not require major changes to the physical space. For example, instead of having a wine cellar, the building could host a monthly wine club that becomes a regular part of residents' evenings.

Expanding amenity offerings in this way can save space but would require new staffing and operational strategies. Taking a nod from current trends in the workplace, a dedicated community or experience manager could centralize the planning and coordination of programming and services, and provide a higher-touch, more elevated residential experience. Third-party partners could also provide these services on a part-time basis, or the offering could be entirely outsourced.

Amenity offerings should also be approached to provide meaningful opportunities to better engage with and complement the surrounding

community, which could bring about a myriad of benefits to local economies, cultural enrichment, and community cohesion. Our research suggests that buildings that are well-connected with the surrounding streetscape provide clear benefits to its residents. Creating more porous boundaries between the building's ground floor and the public sidewalk also makes projects feel more contextually integrated into the community, providing another way to engage with non-residents—for example, offering a gathering space available for the local community, while also activating perpetually underutilized building areas, such as the lobby or reception area.

Buildings should also facilitate ways for residents to engage with and support the existing neighborhood by encouraging them to use local amenities outside the building. Instead of having a reservable party room in the building, for example, this would be a terrific opportunity for the building to partner with local dining and entertainment establishments and help residents host their gatherings there.



Counter resistance to new development by focusing on preserving character and adding community value.

Our research suggests that many residents strongly associate new housing with a loss of neighborhood character. The residential design industry must counter this impression and focus on delivering housing that is both contextually relevant and visually appealing to local communities. Our research also suggests that most people want to live in environments that feel mostly residential. This means we must challenge not only the form, but also the location and scale of new residential developments in the future. If housing stock on a large scale is only permitted to be constructed in more dense, commercial areas, then we are missing the mark in meeting resident expectations.

Of course, presumed aesthetics are not the only reason residents oppose new developments in their neighborhoods. Some residents do not believe that the developers will act in their best interests, while others fear the community's identity will be threatened by newcomers,

or perhaps they latch onto narratives about their quality of life or the value of their owned property diminishing. Anti-housing attitudes are a significant obstacle to the successful development of more and affordable housing in diverse types of neighborhoods.

The solutions to many of these challenges lie not only in design, but also in finding new ways to better engage communities in new development. While the approval timelines for residential developments across markets keep getting longer (another force driving up the price of the new housing), approval processes today do not necessarily solicit productive, objective, or representative feedback. Our study, as well as many others, finds that resistance to new development is disproportionately (and most loudly) expressed among those with higher incomes, as well as owners and longtime residents, and may not accurately represent the views of the community at large.

Addressing these issues is also an opportunity to resurrect “missing middle” housing types (e.g., townhomes, cottage courts, duplexes), solutions that increase density without drastically changing neighborhood character. Because these multifamily typologies are lower scale and more closely resemble the house form, they blend well within predominantly single-family environments. Carefully increasing density in this way would promote walkability and provide housing choices at various price points, which would help increase resident diversity. Currently, a combination of strict zoning laws and market

dynamics that disincentivize developers from constructing smaller buildings often stand in the way of these solutions.

In the future, we have an opportunity to imagine new, streamlined, inclusive strategies to entitlement that would benefit both developers and residents, new and old. As designers, strategists, and consultants, we have a responsibility to consider not just what type of housing we are building, but the ways in which our projects shape, change, and contribute to their surroundings.



Methodology

The **Residential Experience Index** is the result of a multi-year, mixed-methods investigation, utilizing secondary, focus group, and survey research methodologies. Each research stage leveraged findings and insights from the prior stage, which created more reliable, integrated conclusions. The secondary and focus group (qualitative) phases generated stories, contextual insights, and broad themes for further study. The resident survey (quantitative) enabled us to test our hypotheses and enhance our insights via statistical analysis of a large sample of residents, allowing for more generalizability.

Phase 1: Dwelling Typology Comparisons

Rapid densification of cities and changing social structures are creating housing pressures around the world. While this challenge is universal, housing is largely contextual: successful design requires specific knowledge of local cultures, climates, and construction techniques. Required localized expertise often results in traditional practices and groupthink presiding over the design and development needs of local communities. Could we innovate and address the housing challenges of one market by delivering successful housing typologies typically found within another?

We began our research by collecting historical and present-day examples of typical dwelling units, from diverse global cities - Abu Dhabi, Bangalore, Bogotá, Cairo, Copenhagen, Hong Kong, Houston, Istanbul, London, Los Angeles, San José (Costa Rica), São Paulo, Shanghai, Singapore, Tehran, Tokyo, Vienna, and Washington, D.C. We gathered materials such as unit plans, leasing/marketing materials, construction drawings, building floor plans, and/or diagrams to compare practices, designs, and documentation.

Our analysis of these materials suggests that there are both similarities and differences in how cultures organize, plan, and arrange their dwellings. The “sameness” of multifamily residential buildings appears to be increasing around the world. In all markets, there is growing standardization of dwelling layouts within new buildings, and shared amenity areas are becoming more commonplace. We also found in many markets that developer-driven products tend to be more conservative, while public work can be more innovative. Nonetheless, cities show clear differences on market, building, and unit scales. Market-specific economic and political forces help shape the housing that gets built within cities. At the building scale, many differences are dictated by local code and environmental/climate factors, such as floor plate geometries, exit requirements, and needs around daylight. Lastly, at the unit scale, most differences are driven by cultural and demographic factors, which greatly influence typical unit layouts, adjacencies, flexibility, HVAC/ventilation strategies, number of bathrooms, and room sizes.

Phase 2: Focus Groups

What has been built reflects what has been done in the past, but it may not address what today’s residents want or need. After collecting and analyzing example dwelling units in Phase 1, we gauged ideas from one part of the world, such as climate strategies or co-living concepts, and tested their receptiveness in another. To do this, we engaged with actual residents in markets across the world.

We conducted focus groups in seven markets—Chicago, Denver, Houston, London, Los Angeles, Mexico City, and Shanghai—to test various hypotheses that emerged from our prior analysis. Each focus group had 8 to 10 participants. Participants were a mix of Gensler employees and the friends and family of Gensler employees who were not directly affiliated with the firm. All participants were required to be living in multifamily housing at the time or within the prior three years. To reduce bias, we focused on recruiting participants who were not architecture or design practitioners. Participants represented various ages, genders, household makeups, and family sizes.

Participants completed a pre-survey before the session, which primed them for the conversation and provided the facilitators’ background information on participants’ current lifestyles and housing situations. Each focus group was broken into two parts: discussion prompts and value provocations. In the discussion prompts, participants spoke about their current residential environments, experiences, and preferences. In the value provocations segment, participants responded to proposed concepts that would lead to either reductions or additions to their rent amounts. Scenarios included co-living (shared bathroom, kitchen, or living area), reduced energy usage, and inboard bedroom layouts.

Key findings from these focus groups were:

- Participants value design quality and character more than space and features. Natural light, quality materials, and “vibe” are priorities.
- The neighborhood can act as an extension of the living space; it is also part of residents’ identities.
- Many participants, but not all, value smaller-scale clusters versus anonymous mega buildings, which they also tie to identity. Sense of community is driven by scale and duration in housing. Participants in smaller buildings, or buildings broken down into identifiable blocks with tighter shared areas, knew their neighbors better.

- Participants highly value connection to the outdoors, even if not private and/or building-wide spaces are not frequently used.
- Price and location drive decisions on where to live. Residents will adapt living styles to fit the space they can afford in expensive cities.
- Most participants had adverse reactions to unnecessary common spaces or features. The era of over-amenitizing to push rents may be over.
- In the shared economy, co-living is only for a select few. Residents want the ability to ‘opt-out’ of common areas. When everything else is shared, private space, especially at home, is prized.
- Affordability matters, however, approach can vary; and needs to be further tested (e.g., co-living, micro units).

Phase 3a: Resident Survey (Design and Deployment)

Data for Gensler’s Residential Experience Index was gathered via an anonymous, panel-based survey of 13,549 total residents. This survey was conducted in two waves. The first wave was conducted online from January 20 to February 26, 2021 (n=8,990). Select questions were repeated in a second wave, which was conducted online from July 8 to 29, 2021 (n=4,559). We found negligible differences between our survey two waves. Survey respondents in both waves were recruited by Kantar (a third-party research firm) and do not necessarily live in Gensler-designed residences.

Respondents were required to live within specified zip codes within the city proper and metropolitan areas of New York City, San Francisco, Atlanta, Austin, Dallas, Seattle, Chicago, London, and Singapore.

Respondents were demographically diverse across gender, age (18+), race/ethnicity, income, employment, and education levels, and were residents of both multifamily and single-family homes. Quotas around demographic and geographic characteristics were carefully monitored and enforced during fielding to ensure balanced distributions per market. Multiple checks were put in place to manage response validity, including time and attention filters embedded in the survey.

The survey probed and tested broad themes that were identified in the focus groups (Phase 2). The instrument covered a variety of topics to derive a holistic view of respondents’ residential experiences. Beyond demographics, respondents provided details on their household (e.g., number of people, ownership, monthly rent/mortgage

payment, rental assistance), as well as their physical housing environment (e.g., building scale, building typology, year built, home size, makeup, and number of rooms). The survey was structured to reflect the “spheres” of one’s residential experience: 1) the home or unit, 2) the building (if living in multifamily), and 3) the neighborhood. Within each “sphere,” respondents answered a series of questions regarding their current experiences, their evaluations of the physical environment, and their ideal states or preferences. Respondents answered additional questions about their feelings and expectations around community, affordability, access, and safety. The survey concluded with questions regarding intentions to move and aspirations to own (if renting).

Phase 3b: Resident Survey (Analysis and Synthesis)

Gensler’s internal research team led analyses in collaboration with April Spivack, PhD, faculty with the Hanken School of Economics in Helsinki, Finland. Various statistical techniques were employed to analyze the data. Hypothesis testing was largely conducted through comparisons of results and measures of association, used to assess the direction, strength, and/or statistical significance of relationships between two or more groups. This included, but was not limited to, analysis of variance (ANOVA) and t-tests to compare group means, bivariate correlations for continuous-level variables, and chi-square, Cramér’s V, Gamma, or Somers’ d tests for categorical- or ordinal-level variables.

Several latent factors were identified through factor analyses. These data reduction and construct validation techniques helped identify larger, underlying constructs measured by the survey, such as experience, design quality, supportive home environment, community cohesion, and safety. The reliabilities of these factors were tested using Cronbach’s Alpha and Composite Reliability. Factors with sufficient reliabilities were created into composite variables that were then used in the analysis.

Multiple regression and Structural Equation Modeling (SEM) were used to predict different dependent variables, such as overall home satisfaction, Net Promoter Score, safety, community cohesion, and likelihood to stay in home, on the basis of various independent variables related to physical and experiential aspects of the unit, building, and neighborhood environments.

Glossary of terms

Area Median Income (AMI)

Because the cost of living varies so widely between markets, we felt that Area Median Income (AMI) would be a more rigorous method of categorizing respondents than universal income groups. AMI is primarily used in the U.S. to assess eligibility for affordable housing programs. The metric considers two key characteristics: annual total household income and household size. Using the U.S. Department of Housing and Urban Development (HUD) calculation of median income per metropolitan region, we were able to determine each market's income cutoff points per household size.

- Low income: Below 80% of the market's AMI per household size. New construction for any housing in this category typically requires some form of direct subsidy. This is to where most housing funds are currently being allocated.
- Middle income: 80–120% of the market's AMI per household size. This group would qualify for what is referred to as "workforce housing." This type of housing should enable being built without subsidy when housing markets are normal and production is not being restricted. However, that has not recently been the case in most high-cost U.S. cities (e.g., San Francisco, Seattle, Austin, New York City) where housing stock is undersupplied. Housing for this AMI category does not receive much subsidy and is often referred to as the "missing middle."
- High income: Above 120% of the market's AMI per household size. Residents who fall in this AMI category are most likely to live in unregulated, market rate housing, which does not receive any direct subsidies or have pricing restrictions.

AMI data was not readily available for London and Singapore, so we retrieved the most updated median household income data and calculated similar groupings as for the U.S. markets.

Building Factors

Among multifamily respondents, their assessment of their building's design and experience.

- Building design: Rating of the physical design attributes of one's building, including its connection with the neighborhood, disability access, attractiveness, and access to shared amenities, among others ($\alpha = 0.843$, average inter-item correlation values ranging from 0.304 to 0.534).

- Building experience: Impression of one's building on a variety of descriptors, including cleanliness, security, and navigability, among others ($\alpha = 0.847$, average inter-item correlation values ranging from 0.422 to 0.732).

Co-living

A type of communal residential model in which each resident has their own bedroom but shares living spaces and facilities with others. Many, though not all, co-living environments cater to shared interests, values, or intentions. Developers of co-living environments often differentiate their offerings from traditional shared living or dormitory settings by providing fully furnished communal spaces, access to luxury amenities,

all-inclusive pricing, and/or roommate matching services. The demographics of modern co-living tend to skew younger, although schemes are increasingly being explored for the older adults.

Community Cohesion

In our study, "Community Cohesion" represents a scale comprised of nine interrelated variables with good internal consistency ($\alpha = 0.896$) and average inter-item correlation values ranging from 0.314 to 0.619. "Community Cohesion" includes individual items adapted from instruments within peer-reviewed studies that attempt to capture perceptions of neighborhood social cohesion, trust, attachment to neighborhood, tolerance or respect, and collective efficacy (see Bibliography for full list of sources). Respondents provided their level of agreement with the following about their neighbors:

- Would work together to achieve a shared goal
- Can be trusted
- Make newcomers to the neighborhood feel welcome
- Would help the respondent if they were in trouble
- Treat each other with respect
- Share the same values
- Are active in the community
- Are tolerant of others who are not like them
- Stay in the neighborhood for a long time

Generation

We referred to Pew Research Center to define the start and cutoff points of our generational cohorts:

- Generation Z: Born after 1996 (age 25 and younger in 2022, respondents had to be 18 years or older to participate)
- Millennial: Born 1981 to 1996 (age 26 to 41 in 2022)
- Generation X: Born 1965 to 1980 (age 42 to 57 in 2022)
- Baby Boomers: Born 1946 to 1964 (age 58 to 76 in 2022)
- Silent Generation: Born 1928 to 1945 (age 77 to 94 in 2022)

To ensure that our group sample sizes were sufficient to conduct comparative analyses, we combined Generation Z with Millennial (18-41) and Baby Boomer with Silent Generation (58+).

Housing Vulnerability

In our study, "Housing Vulnerability" represents a scale comprised of five interrelated variables with an acceptable internal consistency ($\alpha = 0.76$) and ideal average inter-item correlation values ranging from 0.213 to 0.476. "Housing Vulnerability" includes individual items that attempt to capture concerns around affordability, inclusion, and access. Respondents provided their level of agreement with the following:

- I am concerned about getting priced out of my neighborhood.
- There aren't any housing options in the city or region where I live that are both affordable and adequate.
- My neighborhood isn't for people like me anymore.
- The housing around me is unaffordable.
- I would like to live in a different neighborhood, but I would feel out-of-place or not welcome there.

Markets Surveyed

The respondent catchment zones for each market generally followed the metropolitan area, which the U.S. Census Bureau defines as "a core containing a large population nucleus, together with adjacent communities that have a high degree of economic and social integration with that core" (p. 13-1).

For each market, we determined a tighter (city) and broader (metro area) geographical boundary based on zip code. While most of our residential work to date has occurred closer to the urban core, as more lower-income households are pushed further out from city centers, we believed it was important to also capture the experiences and expectations of those living in the surrounding areas. In each U.S. market, respondents who lived within the limits of the city proper were placed in the "city" category. We carefully monitored fielding so that at least 25% of respondents in each market resided in the city proper. Respondents were placed into a broader "metro area" category if they lived within inner suburbs or satellite cities with higher population densities. In keeping with our focus toward multifamily development, we limited the inclusion of ex-urban communities in our sample. We took a simpler approach to London, where respondents had to live within one of the City of London's eight postcode areas to belong in the "city" group and one of the 15 outer London postcode areas to qualify for the "metro area" group. As a city-state, anyone living within one of the 28 districts of Singapore qualified for the survey and were not separated out farther.

Interestingly, most differences in results between respondents residing within our markets' city boundaries versus the surrounding metro areas were either non-existent, not statistically significant, or very minimal. Instead, we found more meaningful differences between housing type groups, which suggests that the physical home environment—and presumably, the nature of one's neighborhood (either predominantly multifamily or single-family)—is a larger indicator of residential experience than rather arbitrary political boundaries. Common housing types within a city proper also vary largely by city. For example, housing around New York's urban core is predominantly multifamily, whereas in more sprawling urban environments, it is more common to find small single-family homes close to downtown.

Multifamily (Housing Type)

A residential property that contains two or more housing units. To ensure respondents selected their correct housing type, we provided commonly used terms within the local markets:

- U.S. markets: apartment, unit, condominium, cooperative (co-op), duplex, triplex, tenement, etc.
- London: flat, apartment, unit, condominium/ multi-residential, two-flat, three-flat, cooperative (co-op), tenement, etc.
- Singapore: HDB apartment, Private apartment, condominium, duplex, cluster houses, etc.

Neighborhood Factors

Among all respondents, their assessment of their neighborhood's or surrounding area's experience, and safety, as well as the perception of their neighbors and community cohesion.

- Neighborhood experience: One's impression of their neighborhood on a variety of descriptors, including beauty, cleanliness, and authenticity, among others ($\alpha = 0.833$, average inter-item correlation values ranging from 0.321 to 0.683)
- Neighborhood safety: The extent to which one feels safe walking alone in their neighborhood at different points of the day ($\alpha = 0.827$, average inter-item correlation values ranging from 0.478 to 0.764)
- Neighbor perception: One's general opinion of their neighbors regarding their friendliness and consideration, among others ($\alpha = 0.797$, average inter-item correlation values ranging from 0.515 to 0.612)
- Community cohesion: See "Community Cohesion" for explanation

Net Promoter Score (NPS)

A widely used market research metric to gauge customer loyalty and satisfaction. Respondents are asked to rate the likelihood that they would recommend a company, product, or service to a friend or colleague on an 11-point scale, where 0=not at all likely and 10=extremely likely. Respondents who give a rating of 0 to 6 are considered Detractors, 7 to 8 are Passives, and 9 to 10 are Promoters. In our survey, multifamily respondents were asked to rate the likelihood that they would recommend their building to a friend or family member as a place to live.

NIMBYism

The attitude of "Not In My Back Yard" (NIMBY)—the opposition by residents to proposed developments in their neighborhood or surrounding area (regardless of whether it would lead to positive or negative change), and the support for land use restrictions. These residents may not necessarily object to those same developments if they were placed elsewhere.

There are myriad reasons for a resident to adopt a NIMBY viewpoint, but some include a lack of trust in the developers regarding whether they will act in the residents' best interests, a fear that the current community's identity will be threatened by newcomers, and/or a wariness to change in the community's physical makeup or character. Those with a NIMBY viewpoint may feel that the new development would threaten their quality of life and/or value of their owned property. The application of the term has changed over time, originally used in the 1970s by lower- and middle-income residents to fight the placement of facilities that were thought to bring dangerous chemicals and contaminants into their neighborhoods.

We believe that NIMBYism today is a significant obstacle to the successful development of more and affordable housing in diverse types of neighborhoods. The perspectives of both the proponents and opponents of a development are legitimate, and should be considered in Gensler's strategy and design process.

Overall Home Satisfaction

In our study, "Overall Home Satisfaction" represents a scale comprised of five interrelated variables with an acceptable internal consistency ($\alpha = 0.74$) and average inter-item correlation values ranging from 0.281 to 0.664. "Overall Home Satisfaction" includes the following individual items:

- Overall satisfaction with respondent's current unit
- Extent to which respondent feels a sense of community in their current building
- Extent to which respondent could see themselves living where they currently live over different life stages
- Likelihood that the respondent would recommend their current building to a friend or family member as a place to live.
- Extent to which respondent knows their current neighbors

Proportion of Variance (R²)

In regression, a goodness-of-fit measure for how well the variation of one or more variables (independents) collectively explains the variation of another variable (dependent). A model's R² value is always presented on a scale from 0–100%, where a higher value indicates stronger explanatory power of the dependent variable by the independent variable(s). There isn't a generally accepted R² threshold, since some fields of study (namely, human-centric research, such as this study) have an inherently greater amount of unexplainable variation.

Single-Family (Housing Type)

A residential property that contains only one housing unit. There are two primary types of single-family homes: 1) detached (a freestanding structure set alone on its own piece of property), and 2) attached (a home that shares at least one common wall with another). To ensure respondents selected their correct housing type, we provided commonly used terms within the local markets:

- U.S. markets:
 - > Detached: house, stand-alone house, single-detached, cottage, bungalow, mansion, etc.
 - > Attached: townhouse, rowhouse, brownstone, semi-detached, etc.
- London:
 - > Detached: house, stand-alone house, single-detached, cottage, bungalow, mansion, etc.
 - > Attached: townhouse, rowhouse, terrace house, brownstone, semi-detached, etc.
- Singapore:
 - > Detached: bungalow, GCB, etc.
 - > Attached: townhouse, rowhouse, terrace house, semi-detached, shophouse, etc.

Statistical Significance

The determination of whether an observed result is probably real or due to chance. A primary way one can determine the presence of statistical significance is by referring to the test result's p-value. Generally speaking, the smaller the p-value, the more probable that the result is real and not due to chance. The general significance level (the p-value cutoff) used in this study was $\alpha = 0.005$.

When working with large sample sizes (like the ones in this study), very small differences between groups, even if statistically significant, are often meaningless. Therefore, it was essential that we also examined effect size (magnitude or strength of relationships) in addition to p-value when interpreting test results.

Support for Children

In our study, "Support for Children" represents a scale comprised of four interrelated variables with an acceptable internal consistency ($\alpha = 0.744$) and average inter-item correlation values ranging from 0.359 to 0.493. Respondents living with any children under 18 years provided their level of agreement with the following:

- My home has adequate space outdoors for children to play.
- It is safe for children to play outdoors around where I live.
- My home has adequate space indoors for children to play.
- I would consider my current home safe for children.

Support for Independent Living

In our study, "Support for Independent Living" represents a scale comprised of four interrelated variables with an acceptable internal consistency ($\alpha = 0.727$) and average inter-item correlation values ranging from 0.330 to 0.534. Respondents born before 1965 (at least 56 years old in 2021) provided their level of agreement with the following:

- As I get older, it will become difficult for me to make normal use of my home without specific modifications or adaptations.
- I am afraid I won't be able to stay in my home as I get older.
- I would like to downsize my home, but there is something preventing me from moving.
- Due to my age or physical condition, I currently cannot make normal use of my home.

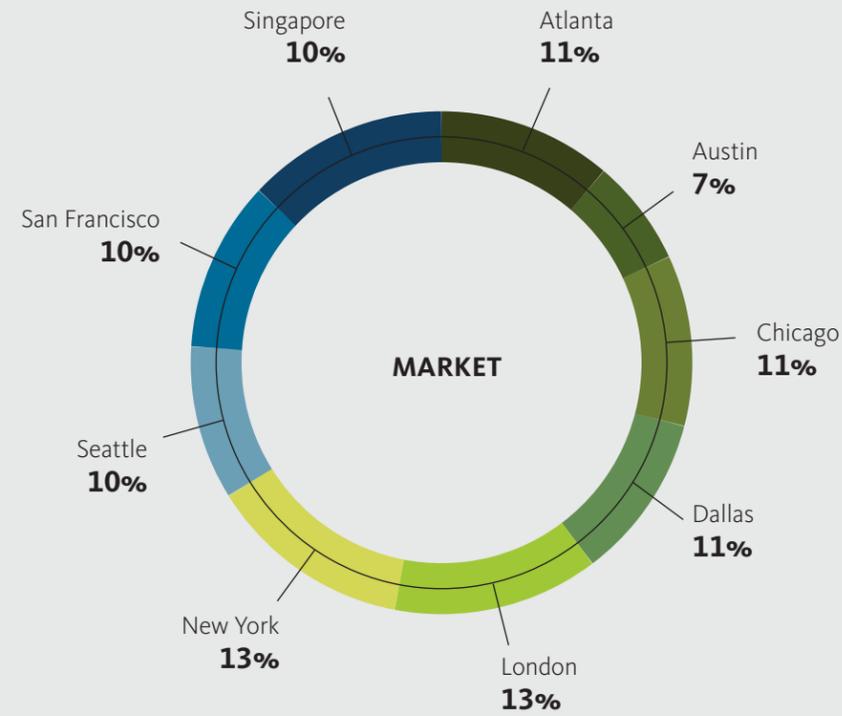
Unit Factors

Among multifamily respondents, their assessment of their unit's design, experience, and support for diverse activities.

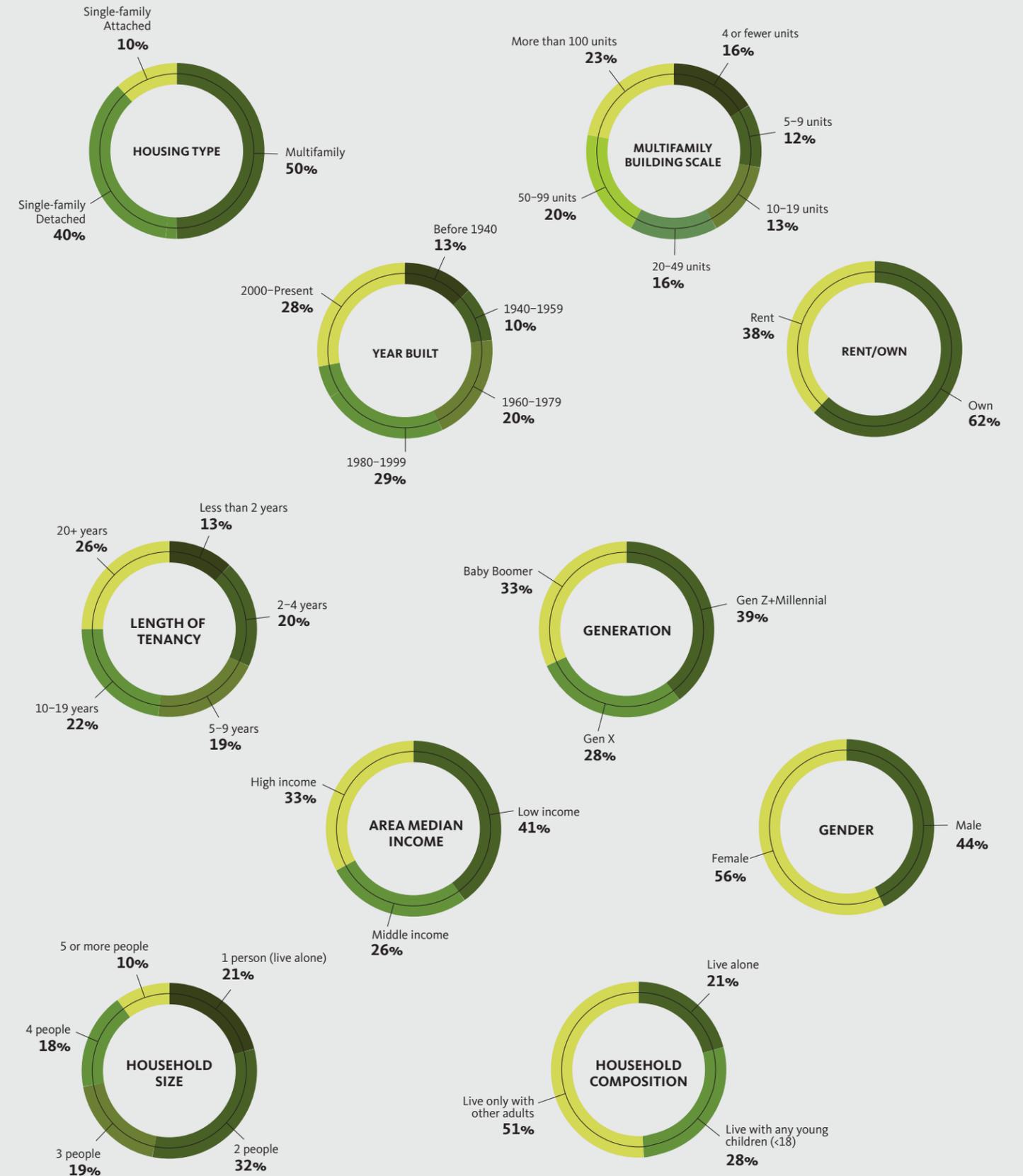
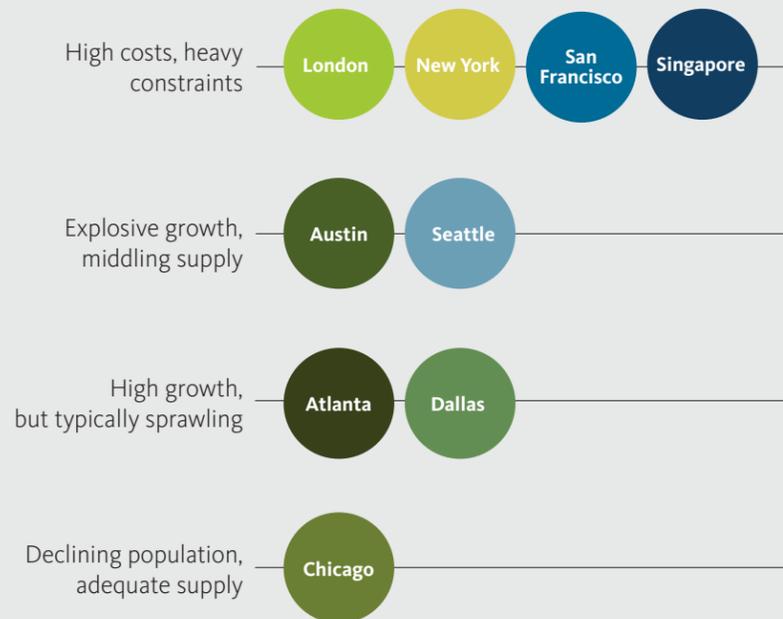
- Unit design: Rating of the physical design attributes of one's unit, including its overall layout, storage space, climate control, and acoustic privacy, among others ($\alpha = 0.890$, average inter-item correlation values ranging from 0.311 to 0.587).
- Unit experience: One's impression of their unit on a variety of descriptors, including comfort, peacefulness, and security, among others ($\alpha = 0.826$, average inter-item correlation values ranging from 0.375 to 0.538).
- Supportive home environment: The ease in doing a diversity of activities within one's unit, including relaxing, working, and cooking, among others ($\alpha = 0.856$, average inter-item correlation values ranging from 0.296 to 0.688).

Sample description

We collected data on the experiences, opinions, and expectations of 13,549 total residents.



We selected our nine markets to cover an array of housing and neighborhood typologies and market conditions. In many ways, these markets share similarities, but they can also serve as points of comparison to one another.



The Gensler Research Institute is a collaborative network of researchers focused on a common goal: to generate new knowledge and develop a deeper understanding of the connection between design, business, and the human experience. Through a combination of global and local research grants, and external partnerships, we seek insights focused on solving the world's most pressing challenges. We are committed to unlocking new solutions and strategies that will define the future of design.

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