



MY GENERATION:

SURVEYING THE VIEWS OF
MILLENNIALS IN METRO MILWAUKEE

PUBLIC POLICY FORUM

ABOUT THE PUBLIC POLICY FORUM

Milwaukee-based Public Policy Forum – which was established in 1913 as a local government watchdog – is a nonpartisan, nonprofit organization dedicated to enhancing the effectiveness of government and the development of southeastern Wisconsin through objective research of regional public policy issues.

PREFACE AND ACKNOWLEDGMENTS

The survey of Metro Milwaukee millennials was undertaken to provide citizens and policymakers with information about the views held by young adults on a variety of factors that have been cited in recent public policy debates as important to the region's attractiveness. The survey was designed by the Public Policy Forum in partnership with The Dieringer Research Group (The DRG) and was conducted by The DRG. Survey results were prepared by The DRG and this report was written by the Forum based on those results.

We wish to thank *The Milwaukee Business Journal* for working with us to jointly develop the idea for this project, as well as Colliers International, which provided a grant that made the project possible. Neither the *Business Journal* nor Colliers International was involved in the conduct of the survey or the preparation of this report.



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Surveying the Views of Millennials in Metro Milwaukee

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INTRODUCTION/SUMMARY

During the past year, policymakers in Greater Milwaukee have debated several major public investments that have been touted as crucial to enhancing the region's image as an attractive and up-and-coming metro area. In each of these debates – ranging from a downtown streetcar, to a new basketball arena, to the need for repairs and improvements to premier cultural institutions – supporters have cited the value of these projects in efforts to attract and retain talent, particularly from the "millennial generation."

But what do we really know about Greater Milwaukee millennials and how they define the ingredients of an attractive metro region? More specifically, how do entertainment, transportation, and quality-of-life amenities measure up in the spectrum of factors considered by young adults when determining where they want to live and work?

To shed light on those questions, the Public Policy Forum teamed up with The Dieringer Research Group to design a survey of Metro Milwaukee millennials. Responses to our online survey – conducted between mid-October and early November – were received from 486 individuals between the ages of 18 and 34 in the four-county (Milwaukee, Waukesha, Ozaukee, Washington) metro area. The sampling plan was designed to achieve consistency with the population of the four counties by geography, gender, age, and ethnicity.

On the surface, the survey found – perhaps surprisingly – that the preferences and concerns of Metro Milwaukee millennials with regard to the region's livability and attractiveness are not much different from what might have been expected from the general population. Crime and jobs dominated responses about the most important factors influencing decisions on where to live, while well-maintained roads and highways were cited more often as important transportation factors than effective mass transit and bicycle-friendly streets.

Yet, probing more deeply, the survey also revealed that characteristics cited by civic leaders as critical to the attraction and retention of young talent – such as a variety of cultural and education attractions, a robust system of parks and open spaces, and vibrant concert and music venues – do register high on the list of reasons cited by millennials for their decision to live in Metro Milwaukee. In addition, while not ranking as high as crime, jobs, and education, arts/culture and public transportation still were cited as important by sizable percentages of respondents.

The following are key findings from our survey of Metro Milwaukee millennials:

- **Crime and the economy are the factors most commonly cited by Metro Milwaukee millennials as important in determining where to live.** When asked to assess the importance of various factors in determining where to live generally, 86% of Metro Milwaukee millennials cited the crime rate as important and 81% cited the strength of the economy/jobs. Those two issues also were the most frequently cited when we asked about the importance of the same set of factors in deciding whether to live in the City of Milwaukee specifically.
- **Crime also is cited most commonly as the most critical issue facing the region and as the factor that Metro Milwaukee millennials like least about the City of Milwaukee.** When asked in an open-ended question what the most critical issue facing Metro Milwaukee is in terms of attracting millennials, 26% cited crime (job market received the next-highest percentage of responses at 24%). In a similar open-ended question asking what they like least about the city, 51% of those surveyed cited a high crime rate.



- **Metro Milwaukee millennials give generally high rankings to the region's cultural and entertainment offerings.** More than two thirds (68%) of Metro Milwaukee millennials say cultural and educational attractions are important to their decision to live in Metro Milwaukee, while 63% cite the importance of concert/music venues. When asked what they like most about the City of Milwaukee, 40% of respondents cited the variety of entertainment and activities, making that by far the most common answer.
- **Many Metro Milwaukee millennials value transit, biking, and walking, but higher percentages place importance on good roads and highways.** When we asked respondents to assess the importance of various transportation services, well-maintained local roads and streets (80%), well-maintained highways (79%), relatively uncongested highways (74%), and relatively uncongested local roads (73%) were cited as important by the majority of respondents. Pedestrian-friendly streets (69%), effective mass transit (56%), and bicycle-friendly streets (46%) were cited as important by somewhat smaller percentages. Meanwhile, 65% of respondents expressed support for additional capacity on major highways, and roughly half expressed support for such initiatives as better bike facilities (52%), a downtown streetcar system (47%), and better regional bus service (46%).

While this survey reveals several important insights into the views of Metro Milwaukee millennials, it is important to note its limitations. For example, because we only surveyed millennials who currently live in the metro area, the results may not hold much relevance for those considering how to *attract* millennials from outside of the region. Indeed, more than two-thirds of those surveyed originally are from Metro Milwaukee and have not lived outside of Wisconsin since turning 18 years old, suggesting that the survey is far better suited to assess strategies for *retaining* millennials already living here.

Similarly, it is important to recognize that asking people to assess the importance of items to which they have had little or no exposure – like high-quality transit or compact and walkable communities – is problematic in that negative responses may indicate lack of context, as opposed to lack of support. Indeed, responses may better reflect what our metro region already is than what it has the potential to become.

Another important limitation is that we *only* surveyed millennials. Consequently, while it would be desirable to do so, it is not possible to use our survey responses to compare the views of Metro Milwaukee millennials with those of older generations.

Nevertheless, when considered with these and similar limitations in mind, we hope that the survey results will provide valuable context for policymakers and community leaders who are working to define a vision for Metro Milwaukee that will be attractive to younger generations and that will help secure the talent we need to grow a 21st century knowledge economy. In the pages that follow, we highlight key insights and themes gleaned from the survey results. The full results are available on our website so readers can review them and also draw their own insights and conclusions.



METHODOLOGY

The Dieringer Research Group (The DRG) conducted 486 online surveys with millennials (defined as individuals ages 18-34) residing within the four-county Milwaukee metro area that includes Milwaukee, Waukesha, Washington, and Ozaukee counties. The number of respondents from each county is shown in the table below. The sampling plan was designed to achieve geographical representation that was reflective of each county's share of the region's population. Furthermore, within Milwaukee County, the sampling plan took into account the proportional difference in population size between the City of Milwaukee and non-city municipalities.

Respondent Groups	Base Sizes
Milwaukee County	336
Waukesha County	97
Washington County	30
Ozaukee County	23

The online survey took an average of 12 minutes to complete and was conducted between October 14 and November 4, 2015.

STATISTICAL RELIABILITY — MARGIN OF ERROR

The sample of 486 respondents yields overall data reliable with 95% confidence at a $\pm 4.44\%$ sampling error interval. Stated more simply, if a similar survey were conducted repeatedly, results within plus or minus 4.44% would occur for any one question 95 out of 100 times. Looking at it another way, if a question received a "yes" answer by 60% of the 486 respondents, the chances are 95 out of 100 that between 55.56% and 64.44% of the targeted population would provide a similar "yes" response, if asked.

SAMPLE SOURCE

Respondents were invited to participate in the survey via an email invitation from opt-in online research panel partners. All panelists had agreed by opt-in to provide data for market research projects. Panelists are incentivized for taking part in and completing surveys.

In order to qualify, respondents needed to be between the ages of 18-34 and currently reside in one of the four specified counties (Milwaukee, Waukesha, Washington, or Ozaukee).

While specific quotas by respondent demographics were not set, a sampling plan matching the demographics of the population was used with the online panel partners in order to include a mix of respondent types by gender, age, ethnicity, and other key demographics.

WEIGHTING SCHEME

In order to ensure that the results would be representative of millennials within the four-county Milwaukee metro area, The DRG conducted a weighting analysis. Weighting is recognized as a standard research industry practice and ensures that survey results are reflective of a given population.



The weighting analysis compared the demographic distribution from the survey data against the U.S. Census figures for each individual county, as defined by zip codes. A further analysis comparing the demographic distribution among residents within the City of Milwaukee and non-City of Milwaukee (but Milwaukee County residents) to Census figures also was conducted.

The results of the analysis identified that a few segments - particularly males, 18-24 year olds, and non-Caucasian residents - were somewhat under-represented in the survey data, despite efforts to achieve appropriate representation through the sampling plan. This is not uncommon among market research studies.

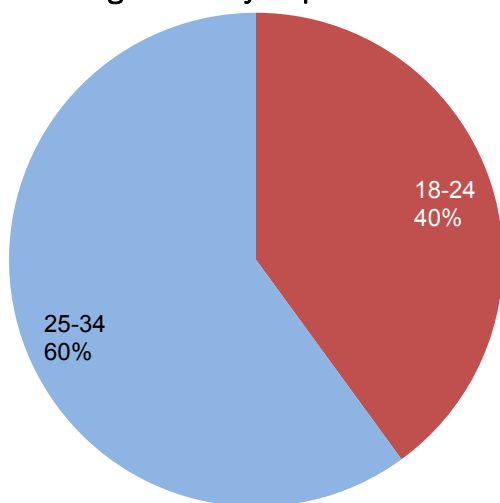
Based on this analysis, the raw survey results were weighted by gender, age, and ethnicity, to more accurately reflect the overall population. Readers should be aware, therefore, that the data presented in this report are weighted.



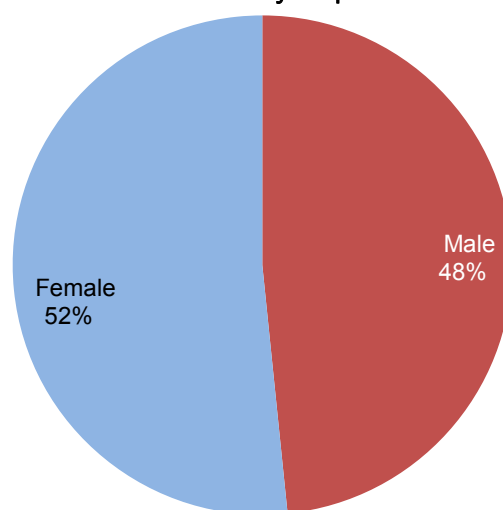
DEMOGRAPHICS OF SURVEY RESPONDENTS

As discussed in the Methodology section, efforts were made to ensure a survey sample that reflected the demographics of the four-county region in terms of age, gender, ethnicity, and geographic representation (both in terms of proportional representation from the four counties and from the City of Milwaukee). Below, we show how those demographic characteristics broke down among the survey respondents, as well as other characteristics that are relevant to analysis conducted in this report. Additional demographic characteristics pertaining to survey respondents can be found in the complete survey results available on our website.

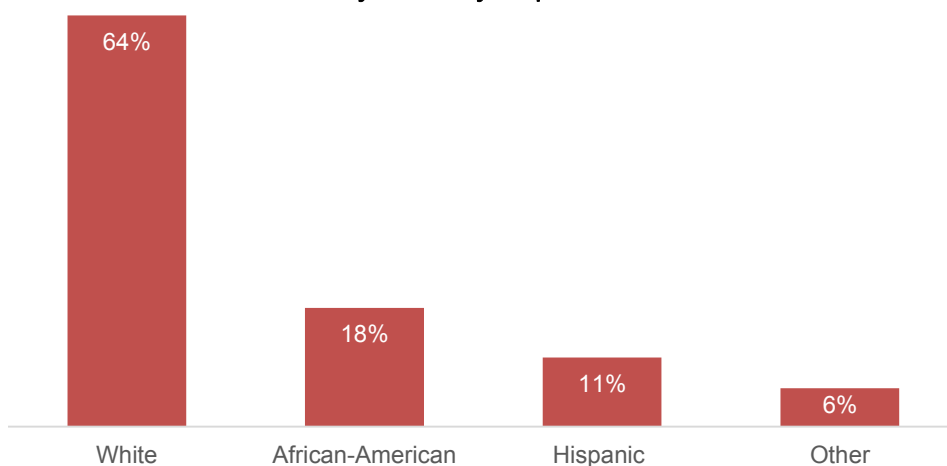
Age of survey respondents



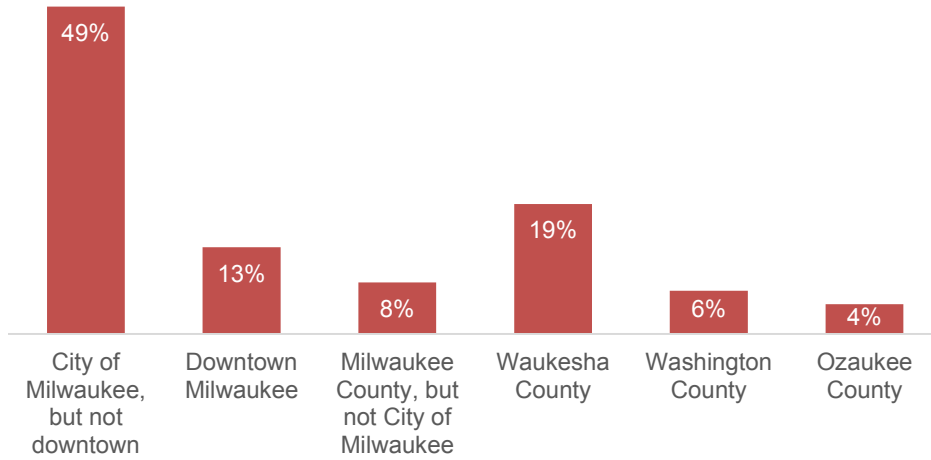
Gender of survey respondents



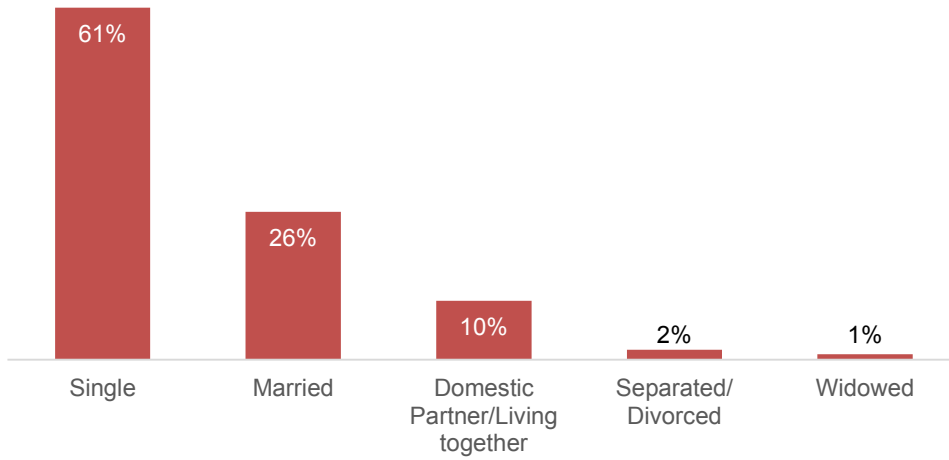
Ethnicity of survey respondents



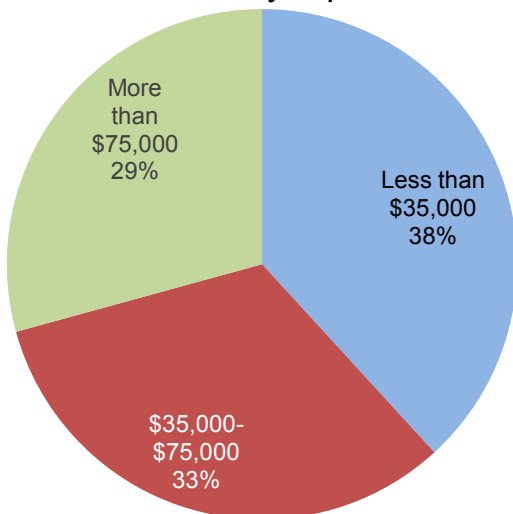
Residence of survey respondents



Marital status of survey respondents



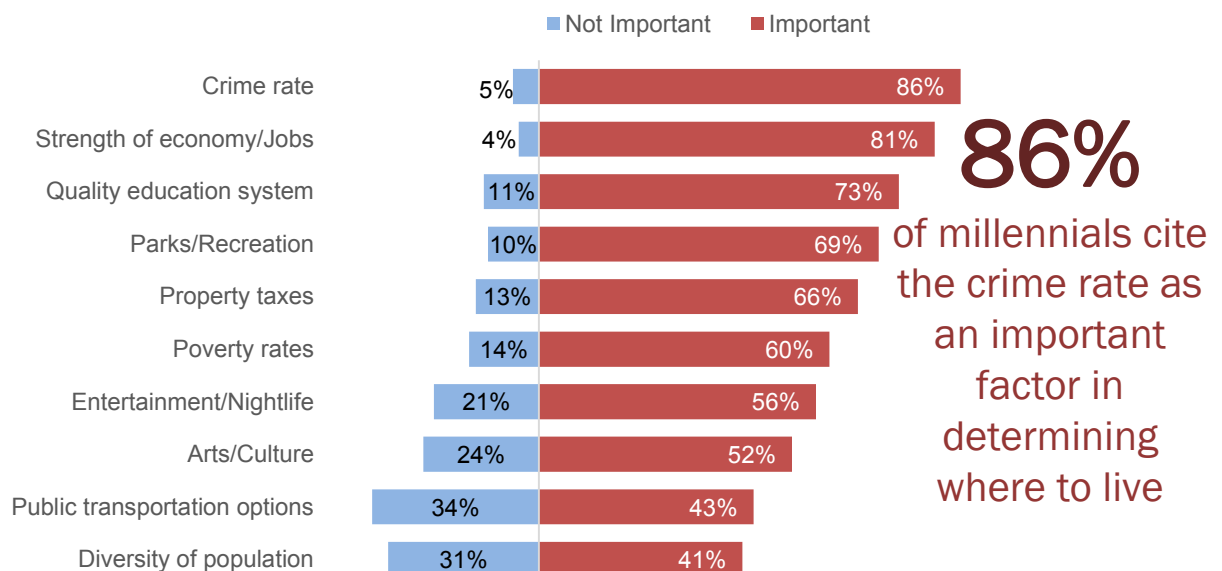
Income of survey respondents



WHAT'S IMPORTANT TO METRO MILWAUKEE MILLENNIALS IN CONSIDERING WHERE TO LIVE?

For our four-county sample of Metro Milwaukee millennials as a whole, crime and economy/jobs were cited most frequently as important factors in considering the ideal metro region in which they would like to live. Also ranking high on the list were a quality education system and parks/recreation. Less frequently cited as important factors were public transportation and diversity of the population; in fact, just over a third of respondents said public transportation was not an important factor (though it also should be noted that each of the factors we listed was cited as "important" more frequently than as "unimportant").¹

How important are the following factors when considering a metro area in which to live?
(All Respondents)

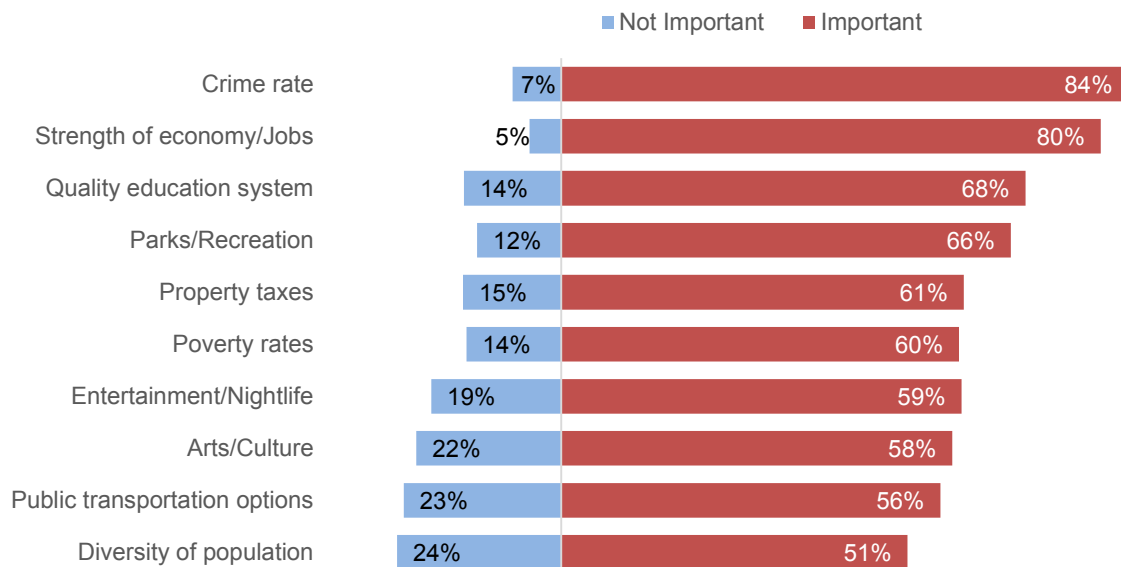


Isolating responses for City of Milwaukee residents reveals that the order of the rankings does not change, though considerably more millennial city dwellers feel public transportation and diversity are important than in the region as a whole. Also, fewer city residents than suburban residents cited property taxes as important.

¹ For this question, we asked respondents to rate each factor on a five-point scale, with a "1" signifying "Not at all important" and a "5" signifying "Very important." Ratings of "4" and "5" were combined to comprise the "Important" percentage in the chart, and responses of "1" and "2" were combined to comprise "Not Important." The percentages do not add up to 100% because responses that indicated neutrality (i.e. a "3" on our five-point scale) are not included in the chart. This approach is used throughout this analysis for similar questions, including those that solicited responses ranging from "Strongly oppose" to "Strongly support." The full breakdown of survey responses for each question can be found on our website.



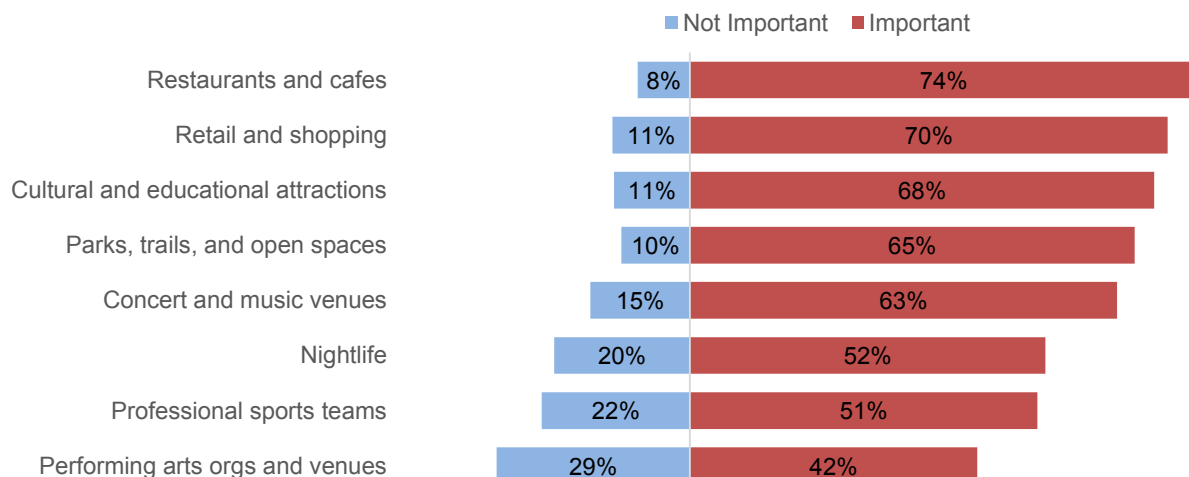
How important are the following factors when considering a metro area in which to live?
(City of Milwaukee residents)



WHY MILLENNIALS CHOOSE TO LIVE IN METRO MILWAUKEE

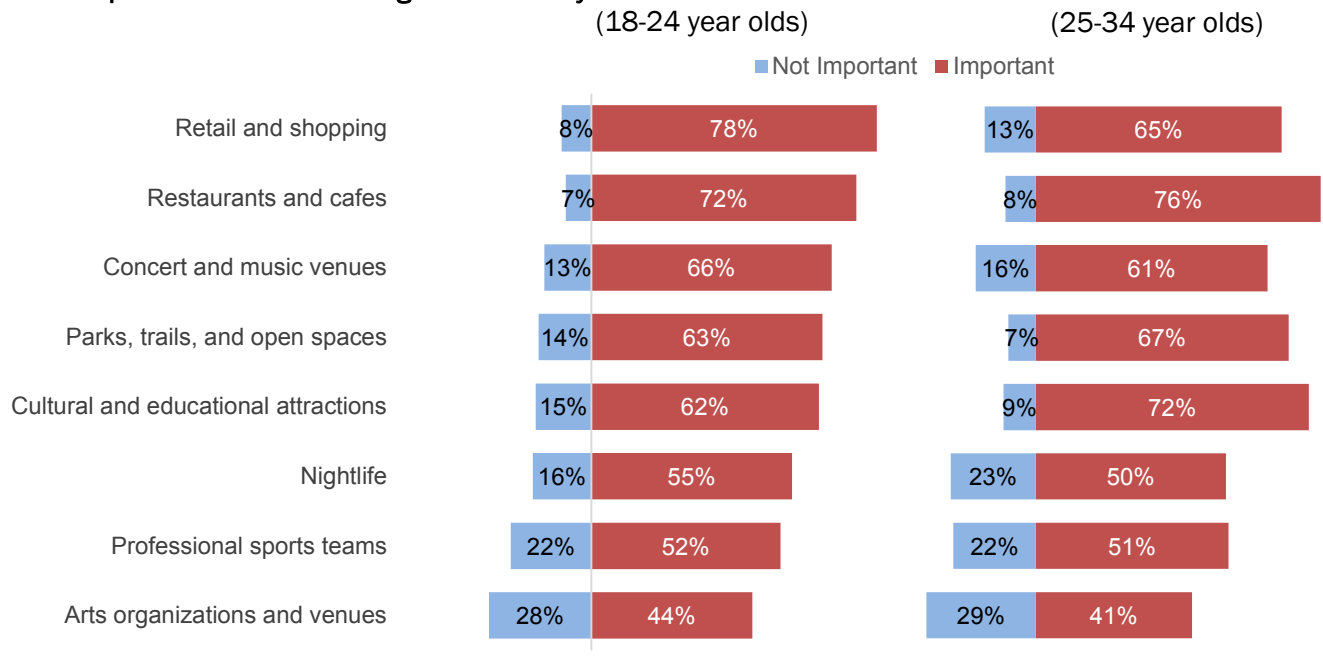
Probing more deeply into the types of amenities that were important to millennials in their decision to choose Metro Milwaukee as a place to call home, we found that the region's variety of restaurants and cafes, retail and shopping, and cultural and educational attractions were cited more frequently than other amenities as important factors by our four-county sample. Those amenities cited least frequently were professional sports teams and vibrant performing arts organizations and venues, though a majority of respondents still cited professional sports as important and more than two-fifths did the same for the performing arts.

How important are the following amenities in your choice to live in Metro Milwaukee?
(All respondents)



For this question, we did not find noticeable differences between the responses of city versus non-city residents. We did find, however, that there were some discernible differences among older versus younger millennials. For example, younger millennials (ages 18 to 24) cited variety of retail and shopping as important more frequently than older millennials (ages 25 to 34).

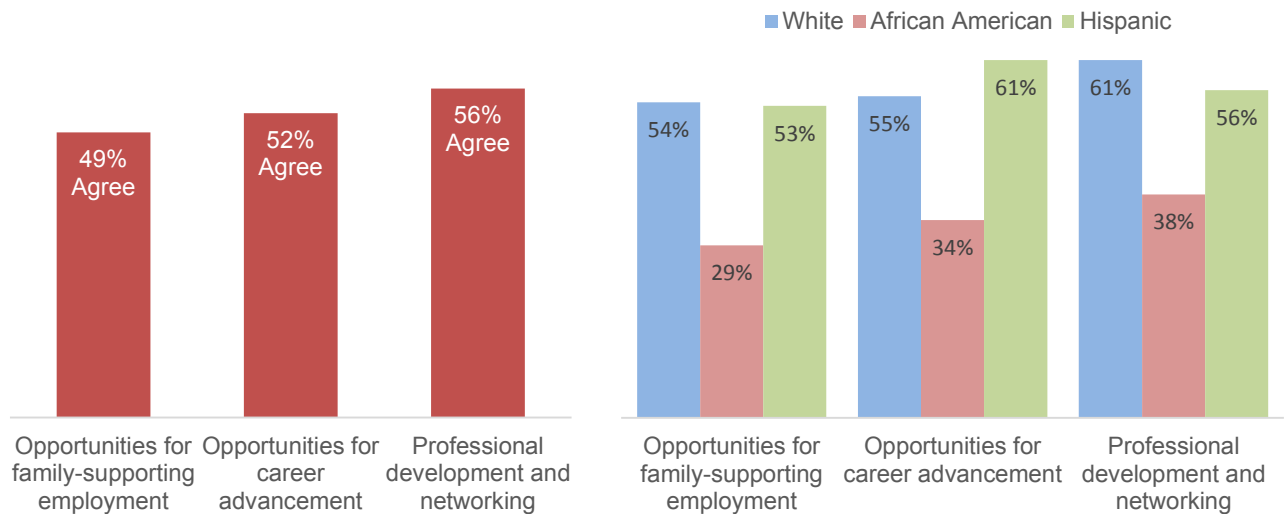
How important are the following amenities in your choice to live in Metro Milwaukee?



We assumed that the economy/jobs would be important considerations for millennials, so we also asked specifically about millennials' views on the region's economic climate. We found that roughly half agreed that Metro Milwaukee provides sufficient opportunities for professional development for young professionals and opportunities for career advancement, while slightly fewer than half felt the metro region offered sufficient opportunities for family-supporting employment. Here, we noticed significant differences in the responses of African American respondents versus other races, with only about a third of African American millennials feeling that Metro Milwaukee offers sufficient opportunities in any of these areas.



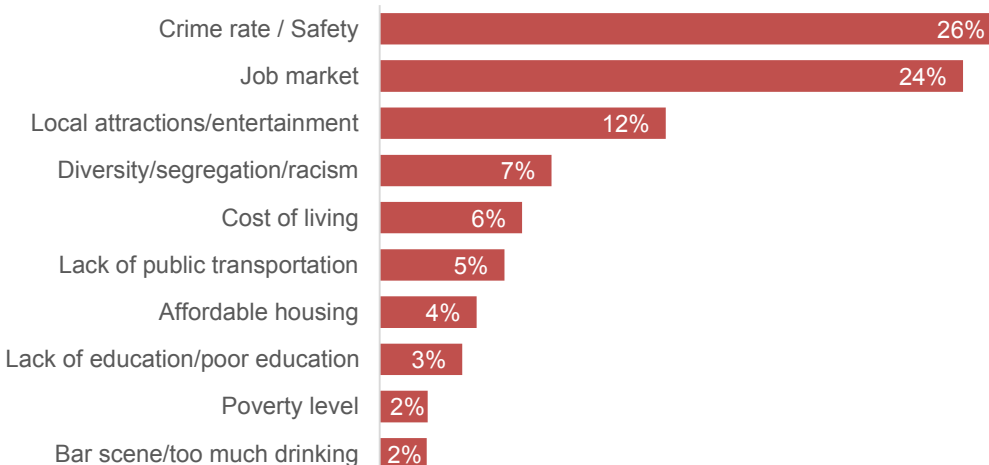
With regard to jobs and the economy, do you agree that the Metro Milwaukee area provides...
(All respondents)



Finally, when we asked an open-ended question about the most critical issue facing Metro Milwaukee in terms of attracting young adults, crime and jobs again topped the list, with about a quarter of respondents citing each of those issues. Local attractions/entertainment placed third with 12%.

The responses to this question demonstrate the difficulty involved with drawing firm conclusions from the survey data, as well as how the data could be "spun" depending on one's point of view. On the one hand, some might argue that the relatively low percentage of respondents who cited local attractions/entertainment as the most critical issue in attracting young adults is evidence that the push for a new arena and improved cultural attractions has been overblown in terms of their relevance to millennials. Conversely, others might argue that since this was one of the most commonly-cited issues (after the high-profile issues of crime and jobs), its importance is verified.

What is the most critical issue facing Metro Milwaukee in terms of attracting adults in their 20s & 30s?
(All respondents - issues cited by 2% or more of respondents)

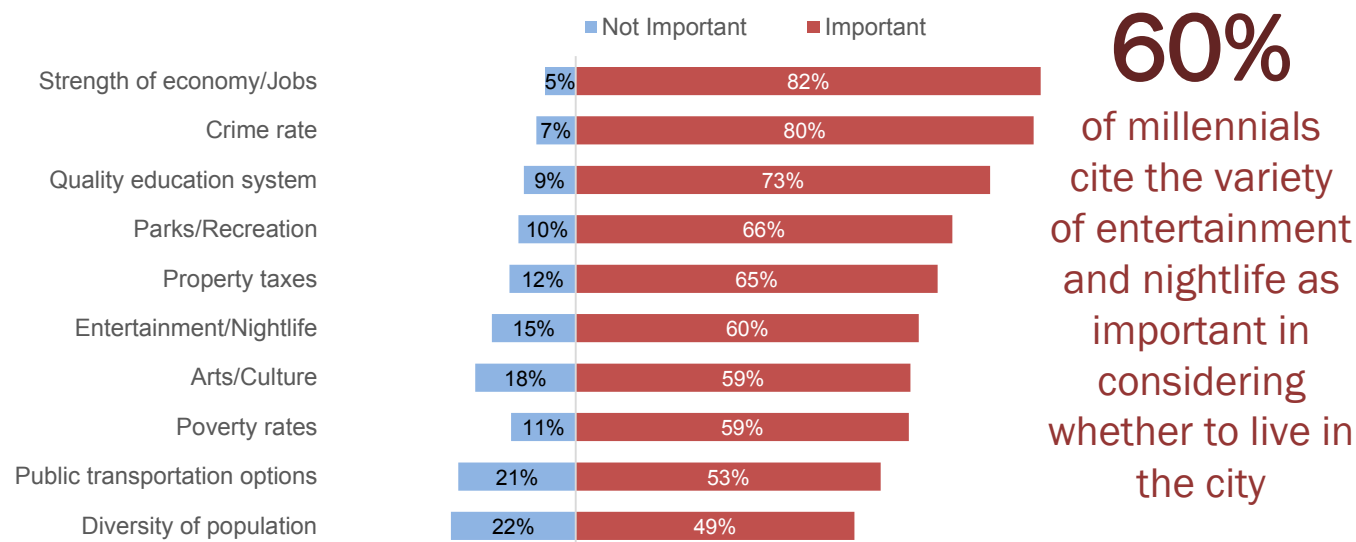


HOW MILLENNIALS FEEL ABOUT THE CITY OF MILWAUKEE

In addition to asking millennials about the general factors that are important in determining where they wish to live, as well as about some specific factors that have led them to locate in Metro Milwaukee, we also wanted to gain insight into their perceptions about the City of Milwaukee. We started by asking about the importance of several factors in determining whether or not they wished to live in the city.

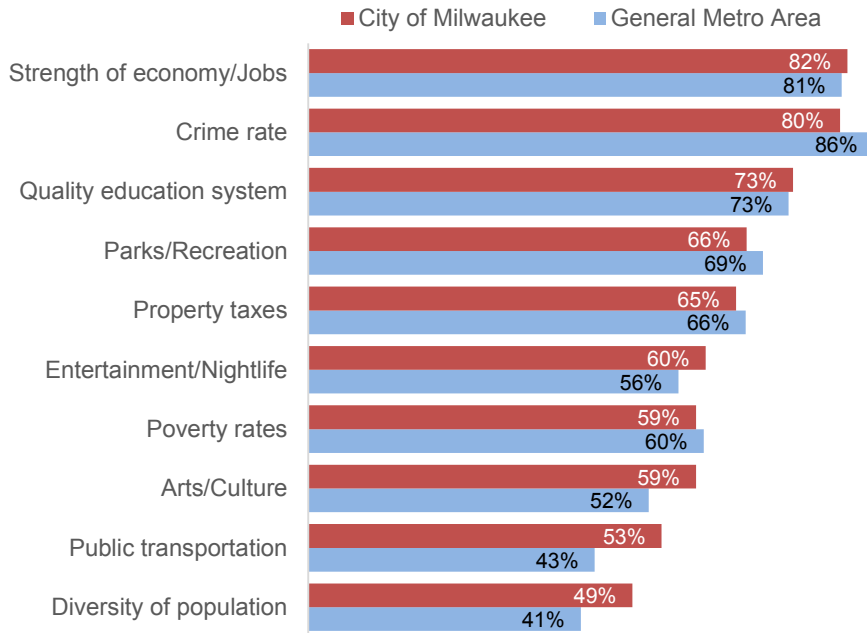
Economy/jobs, crime, and education again were factors more frequently cited as important to millennials' decision on whether to live in the City of Milwaukee, while public transportation options and diversity of population were cited by lower numbers of respondents. When compared to our earlier question about factors important to millennials in generally choosing a place to live, we see that the results are similar.

How important are the following factors when considering whether to live in the City of Milwaukee? (All Respondents)



Importance of factors when considering where to live...

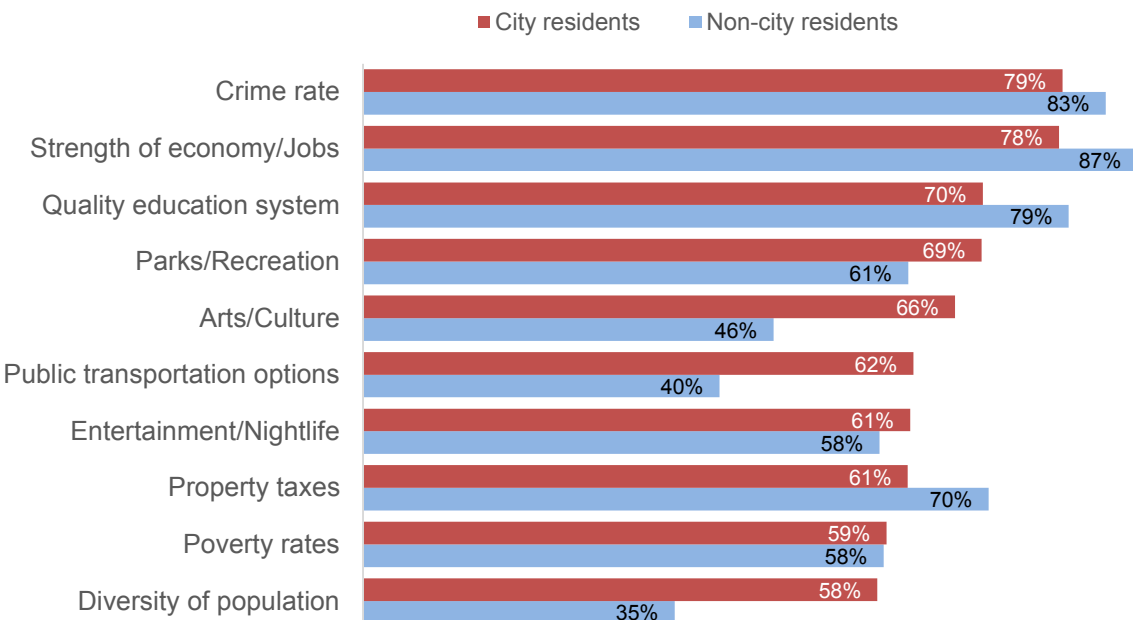
(City of Milwaukee vs. General)



Responses to this question show that city residents place a higher value on transit, arts/culture, and diversity than their suburban counterparts. Those results are not surprising given that these millennials already have made the decision to live in Milwaukee, which has more bus service, arts/cultural institutions, and diversity than suburban areas.

How important are the following factors when considering whether to live in the City of Milwaukee?

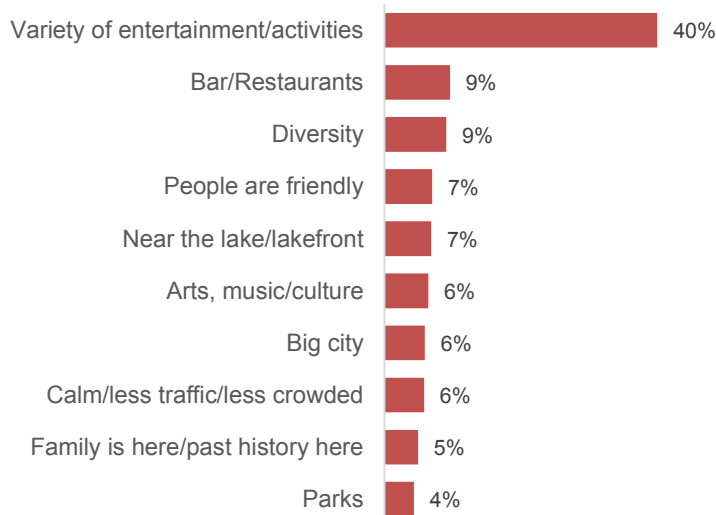
(City of Milwaukee residents vs. Non-city residents)



We also asked two open-ended questions regarding what millennials like most and least about the City of Milwaukee. Variety of entertainment/activities was by far the most commonly-cited attribute of the city that millennials like most, with bars/restaurants and diversity ranking next highest. A perception of high crime was by far the most frequently cited characteristic that respondents like least (with more than half citing that factor), with segregation and "too much construction" ranking second and third, respectively.²

What do you like most about the City of Milwaukee?

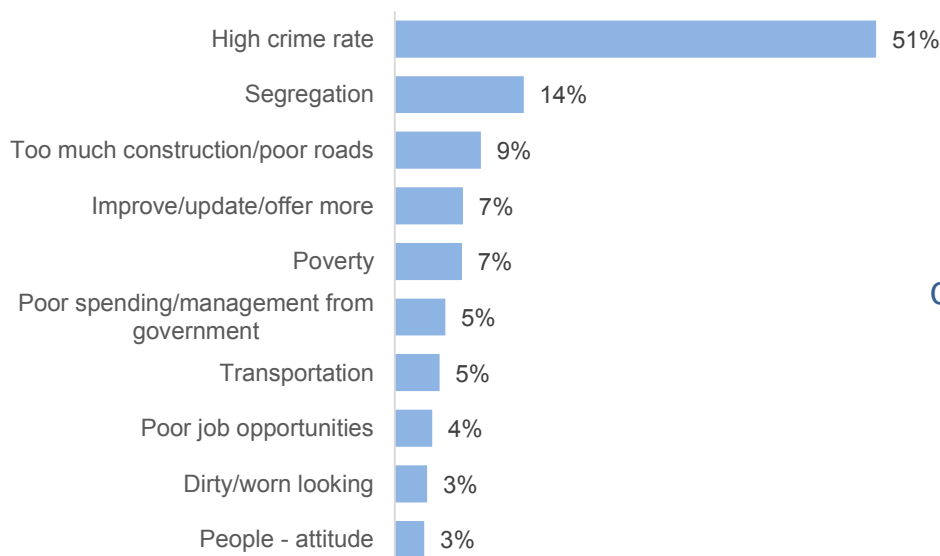
(All respondents)



40%
of millennials
cite the variety
of entertainment
and activities as
what they like
most about the
city

What do you like least about the City of Milwaukee?

(All respondents)



51%
of millennials
cite the high crime
rate as what they
like least about
the city

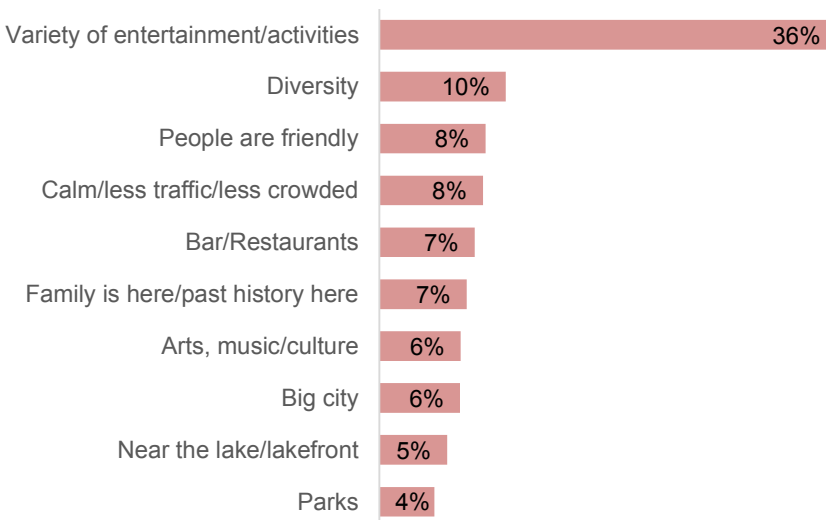
² The charts on this page only include factors mentioned by 3% of respondents or higher (and on the following page 2% or higher); consequently, the totals do not add up to 100%.



Breaking down responses to these two questions between city and suburban millennials yields some interesting differences. Variety of entertainment/activities still was cited most frequently as the favorite attribute by those living in the city, but by a smaller percentage than those living outside of the city. Millennials living in the city also were slightly more likely to cite diversity and the friendliness of Milwaukeeans. In terms of least favorite characteristic, crime still topped the list for city residents, but again by a smaller margin. City residents also were more likely than their suburban counterparts to cite poverty and poor job opportunities as least favorite characteristics.

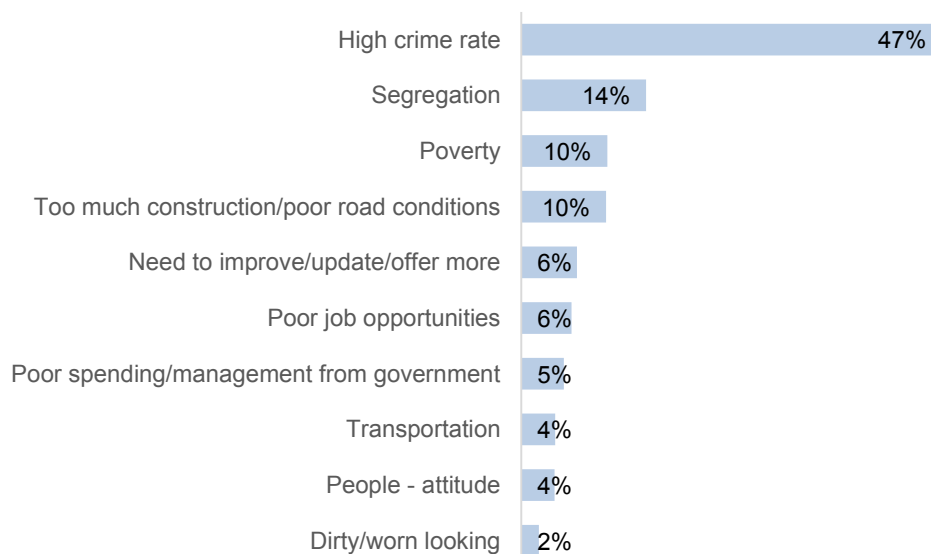
What do you like most about the City of Milwaukee?

(City of Milwaukee residents)



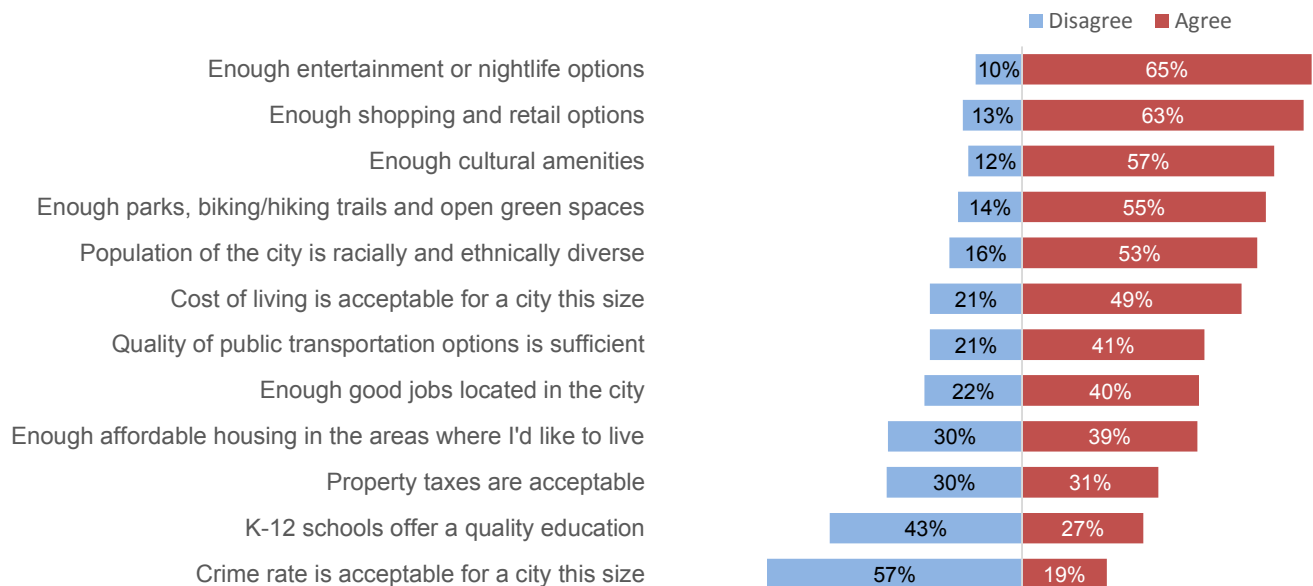
What do you like least about the City of Milwaukee?

(City of Milwaukee residents)



To gather additional perspective on what millennials like and dislike about the city, we also asked them about the city's amenities, affordability, and other factors considered relevant to their opinion of the city as a place to live, work, and play. For the four-county sample as a whole, we found relatively widespread agreement that the city has sufficient entertainment/nightlife and shopping/retail, and that a majority of respondents agreed the city has sufficient cultural amenities, parks, and racial/ethnic diversity. Roughly a fifth of respondents agreed that the crime rate is acceptable, and less than a third agreed that the K-12 schools provide a quality education and that property taxes are acceptable.

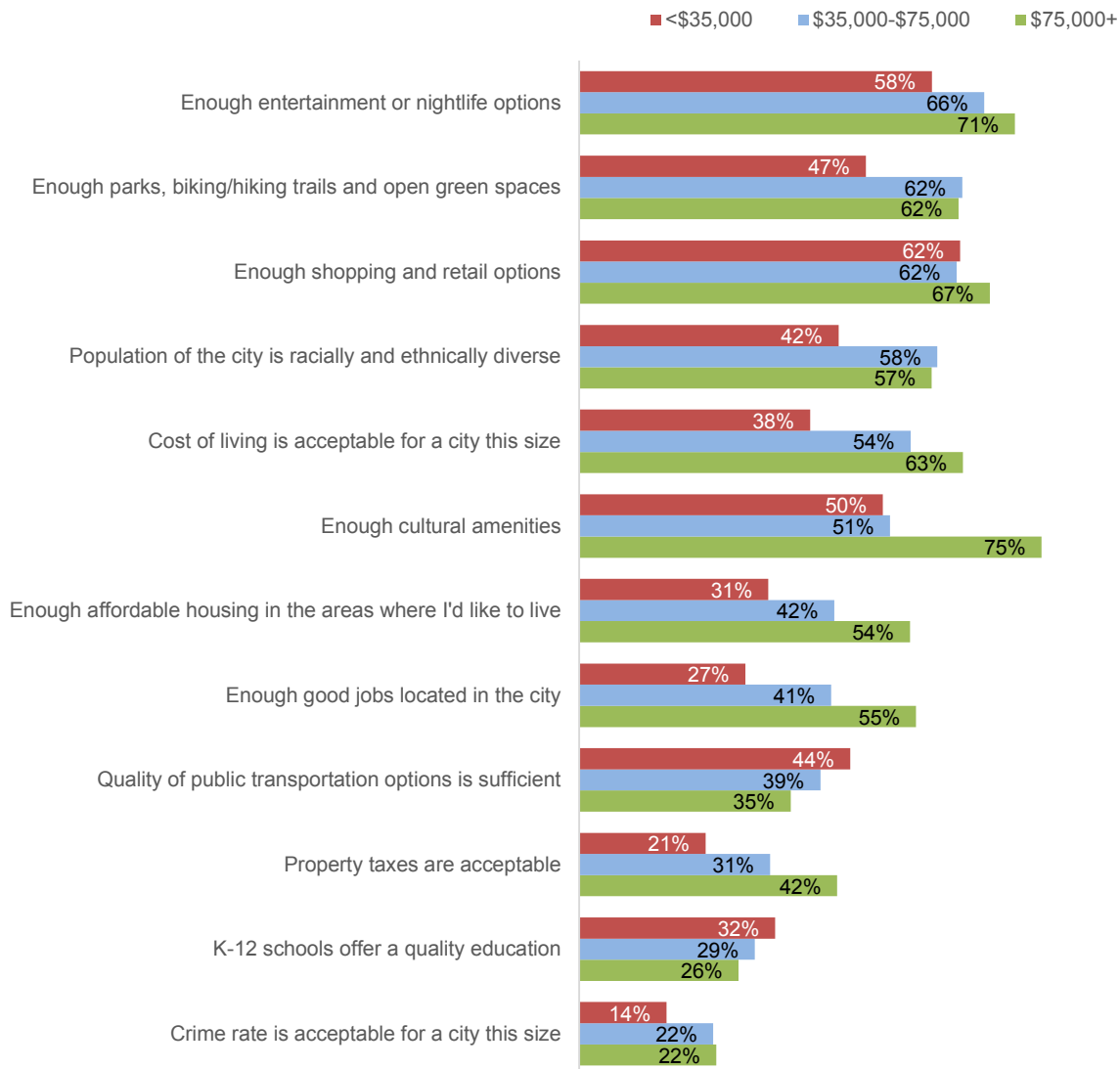
To what extent do you agree with the following statements about the City of Milwaukee?
(All respondents)



Interestingly, responses from city residents to this question essentially mirrored those of non-city residents. We did see some substantial deviation by income level, however. Predictably, millennials making less than \$35,000 per year (which presumably includes full-time students) were far less likely to view the city as affordable and having enough good jobs and acceptable property taxes than those at higher income levels. Yet, substantial differences also are observed in their views on the sufficiency of cultural amenities and entertainment/nightlife, perhaps reflecting that those amenities may be viewed as unaffordable to those at lower income levels.



To what extent do you agree with the following statements about the City of Milwaukee?
(By income levels)

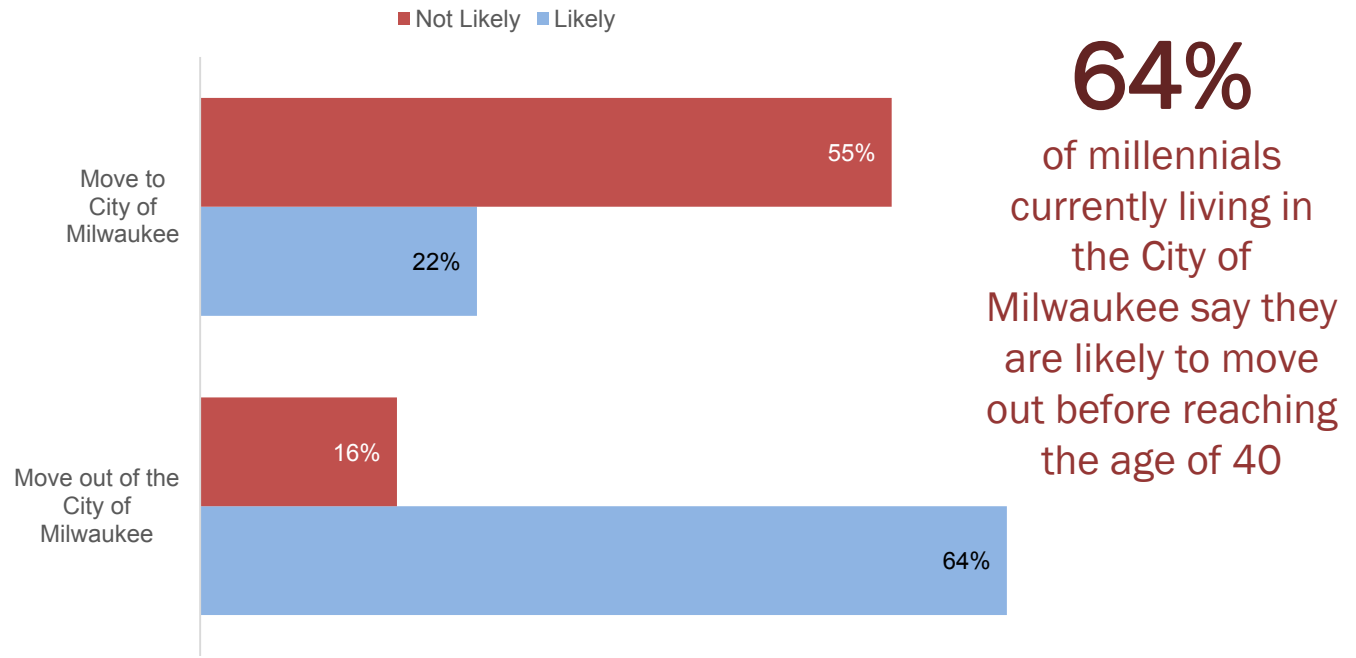


Finally, we were curious about the extent to which millennials living outside the city thought they might consider moving into the city before they turned age 40, and the likelihood that those already living in the city might move outside of it by that age. For non-city residents, we found that about a fifth were likely to move into the city before turning 40, while 55% said they were unlikely to do so. Meanwhile, nearly two-thirds of millennials currently living in the city said they were likely to move out before age 40, with only 16% saying they were unlikely to move.³

³ We did not ask respondents who said they were inclined to move out of the city where they thought they would be moving. It is possible that they plan to move to another city outside of the region or state, or they may plan to remain in the region but move from the City of Milwaukee to a suburb. Consequently, it would be inappropriate to interpret responses to this question as evidence that nearly two-thirds of millennials plan to forsake urban living in favor of a suburban lifestyle by the time they turn 40, or to make other interpretations that similarly cannot be supported by responses to our survey question.



Likelihood of moving to/from the City of Milwaukee before turning 40
(All respondents)

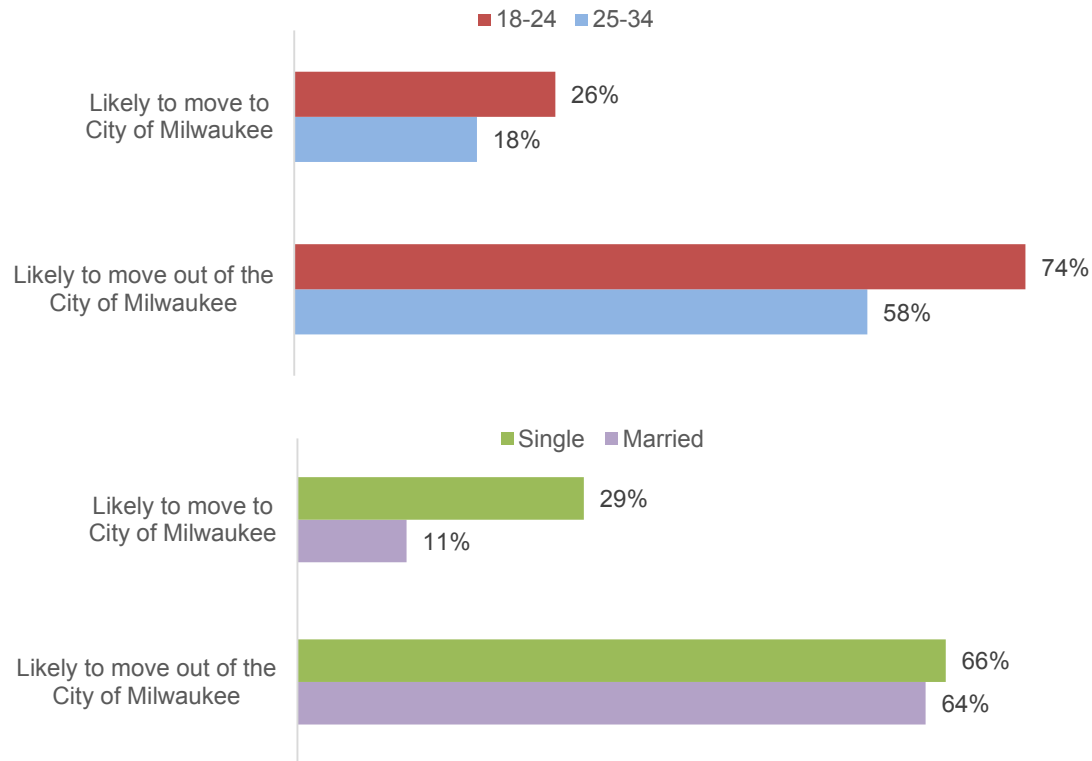


Probing the responses of non-city residents, we find that older millennials consider themselves much less likely to move into the city before reaching age 40 than those between the ages of 18 and 24, which may indicate that city living is more attractive to millennials before they are thinking about settling down with a spouse and/or children. Indeed, our results also show that married millennials living outside of the city are far less likely to see themselves moving into Milwaukee before they reach age 40 than single millennials.

When we look more deeply into the responses of city residents, we see that younger millennials are somewhat more likely to see themselves moving out of the city before they turn 40 than older millennials. This may reflect that a greater proportion of millennials living in the city after the age of 24 already have settled into homes and careers and will not be as transient. (It is possible that many of the 18-24 year-old millennials are full-time college students, which also may have impacted these results.)



Likelihood of moving to/from the City of Milwaukee before turning 40 (By age and marital status)



PERCEPTIONS OF MILLENNIALS WHO HAVE LIVED IN OTHER CITIES

We found the emphasis on crime among Metro Milwaukee millennials to be somewhat surprising, as Milwaukee is not necessarily known as an unsafe city, despite a recent spike in the murder rate.⁴ It is possible that this emphasis was skewed by the substantial attention being given to the city's murder rate at the time the survey was conducted, but there is no way of knowing if that is the case.

Those reviewing these results also may argue that respondents' attitudes on this issue have been shaped by their lack of experience living in other places. We are able to provide some insight into *that* question, as one of the survey's concluding questions asked those who have lived in a city outside of Wisconsin since turning 18 to compare Metro Milwaukee with the outside city in which they had most recently lived.⁵

Of the 157 respondents (32% of the total sample size) who have recently lived in a city outside of Wisconsin, 20% rated Milwaukee as better than the previous city with regard to the crime rate, 24% said Milwaukee is on par with that city, and 52% said Milwaukee is worse. While the answer to this question obviously could be influenced by whether the previous city was a large city with a high crime rate, as opposed to a smaller city or a suburban or rural area, this does indicate that even those who have lived elsewhere recently perceive crime to be a significant issue in Milwaukee.

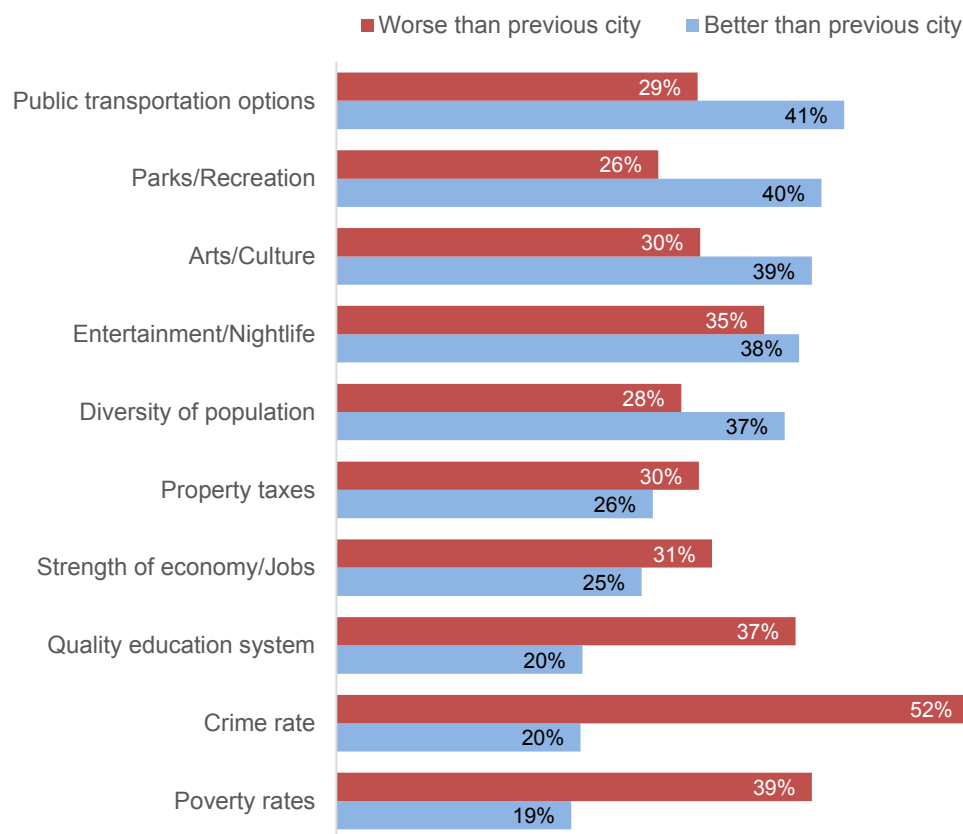
⁴ As of the end of November, the city had recorded 135 homicides, as compared to 86 reported in all of 2014.

⁵ Our survey question did not define "city," so it is possible that the outside "city" actually was a village or town.



How does Metro Milwaukee compare with the city in which you lived most recently?

(Respondents who have recently lived in a city outside of Wisconsin)



52%
of millennials say
Metro Milwaukee's
crime rate is worse
than the city in
which they
previously lived

The responses to this question (shown above) also provide interesting insights with regard to millennials' views on other characteristics of Metro Milwaukee. For example, roughly two-fifths of respondents rated Metro Milwaukee's public transportation options as better than the city in which they had most recently lived, despite Metro Milwaukee's lack of rail options and limited regional bus services. The region's parks/recreation, arts/culture, and entertainment/nightlife were next on the list in terms of highest percentages, while poverty, crime, and education ranked at the bottom. Again, it must be kept in mind that the responses to this question are influenced by the specific locale in which the respondent had most recently lived; for example, if that locale was a smaller city or rural area, then Milwaukee's lack of rail options likely would not be viewed as a detriment.



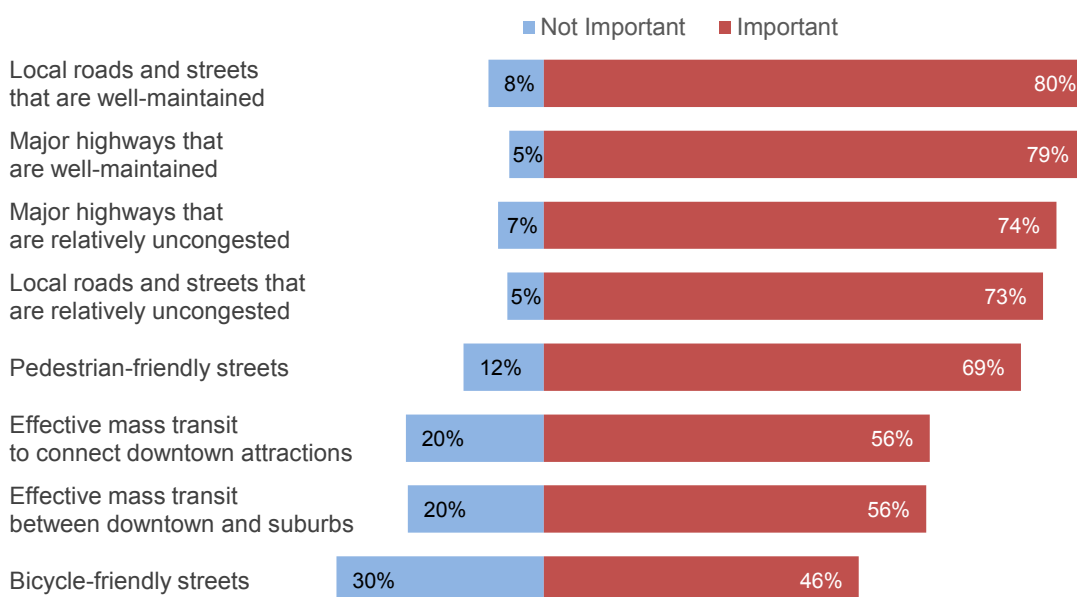
HOW DO METRO MILWAUKEE MILLENNIALS VIEW THE REGION'S TRANSPORTATION OPTIONS AND ASPIRATIONS?

Given the prominent nature of transportation issues in Greater Milwaukee – including debates on the Milwaukee streetcar and I-94 East-West Corridor expansion, as well as plans by Milwaukee County to explore a bus rapid transit line between downtown and the Regional Medical Center – we wanted to probe the views of Metro Milwaukee millennials on transportation.

Our interest also was piqued by several recent national surveys that have been used by some to argue that millennials have different transportation preferences from older generations. Those include a July 2015 survey by the National Association of Realtors and Portland State University, which found that “millennials placed more importance on being within an easy walk of places and having public transit nearby, compared to the other generations.”⁶

Our survey of Metro Milwaukee millennials found that while there is solid support for improved transit connections both in downtown Milwaukee and between the city and suburbs, higher importance was placed on keeping local roads and state highways well-maintained, and even in expanding highway capacity. For example, when we asked millennials to assess the importance of various automobile, transit, and other transportation services, we found that well-maintained and relatively uncongested roads and highways were cited by higher percentages than services involving other modes. Still, nearly 70% cited pedestrian-friendly streets as important, and more than 50% rated effective mass transit to connect downtown attractions, as well as to connect downtown and suburbs, as important.

How important to you are the following transportation services? (All respondents)

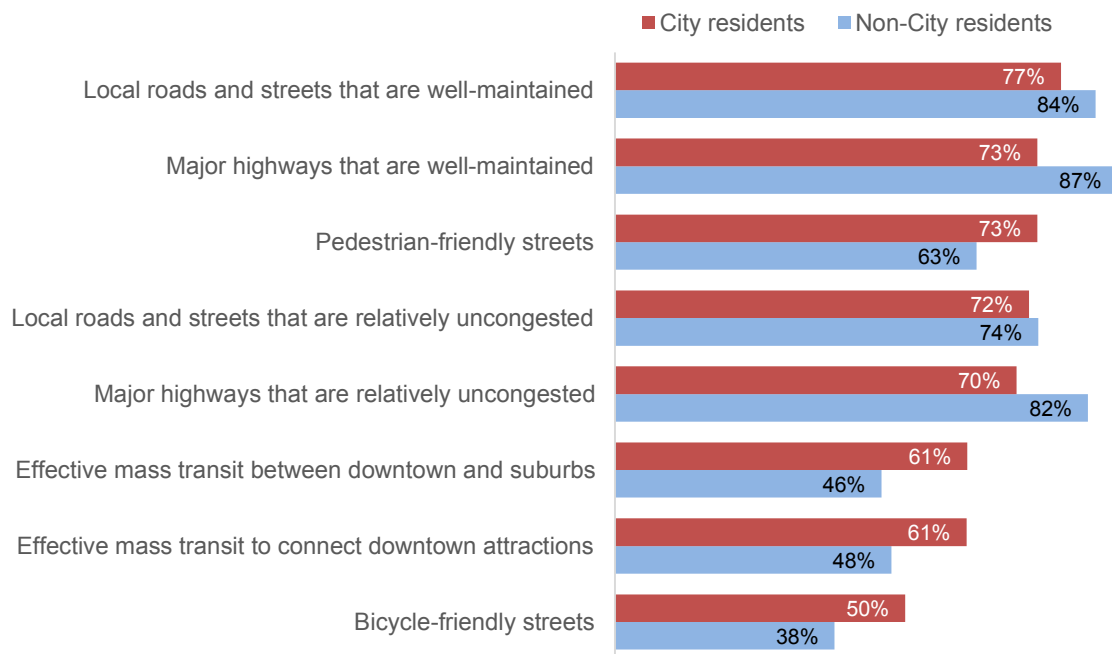


⁶ National Association of Realtors and Portland State University, “Community & Transportation Preferences Survey,” July 23, 2015. Accessed at: http://trec.pdx.edu/sites/default/files/NAR-PSU_2015_C%26T_Preferences_Survey_Report-1.pdf.



We surmised that there may be differences of opinion on this question among millennials living inside and outside of the city given that suburban residents tend to rely more heavily on automobiles. We did find that there was greater support by city residents for mass transit options and bicycle- and pedestrian-friendly streets, and slightly less support for relatively uncongested highways. Still, the basic ranking of responses was quite similar.

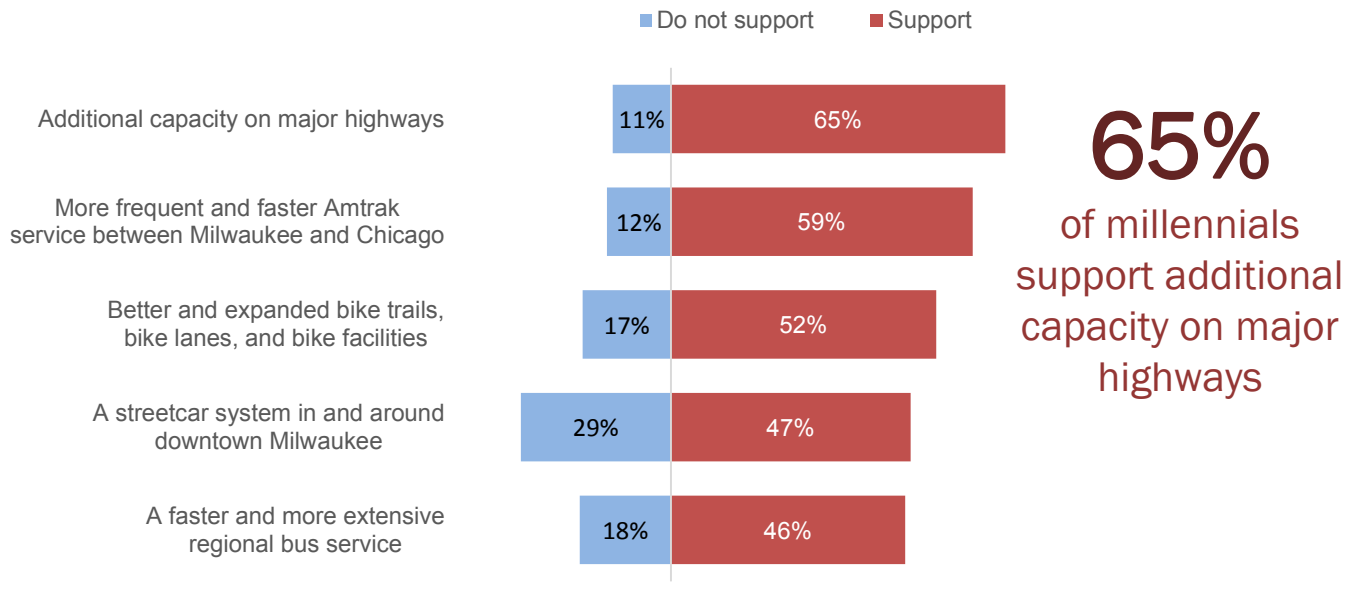
How important to you are the following transportation services?
(City vs. non-city residents)



We also asked respondents to express their level of support for five specific transportation improvements that have been discussed for the Metro Milwaukee area. Overall, for the four-county sample, the highest percentage of millennials expressed support for additional capacity on major highways (65%). More frequent and faster Amtrak service between Milwaukee and Chicago placed second (59%). A solid majority also favored better and expanded bike trails, lanes, and infrastructure, while a downtown streetcar and improved regional bus service did not quite achieve majority support.

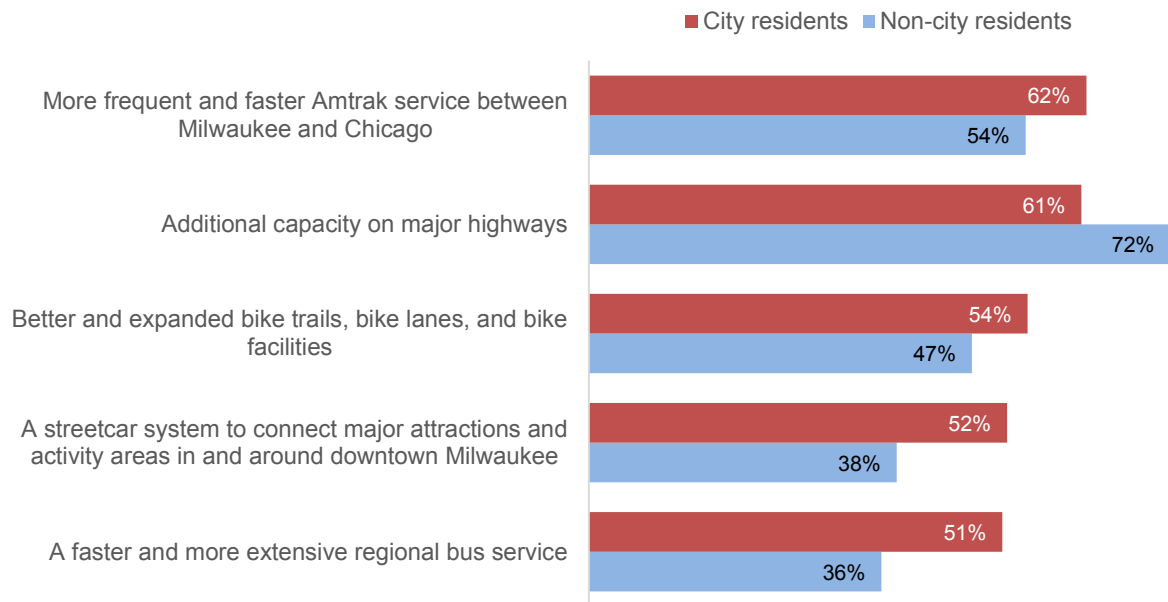


What is your level of support for the following Metro Milwaukee transportation initiatives?
(All respondents)



Again, responses to this transportation question revealed some differences between city and non-city residents. Enhanced Amtrak service between Milwaukee and Chicago received the strongest support from city residents. Meanwhile, a smaller percentage of city residents indicated support for additional highway capacity, though 61% still expressed support.

What is your level of support for the following Metro Milwaukee transportation initiatives?
(City vs. non-city residents)



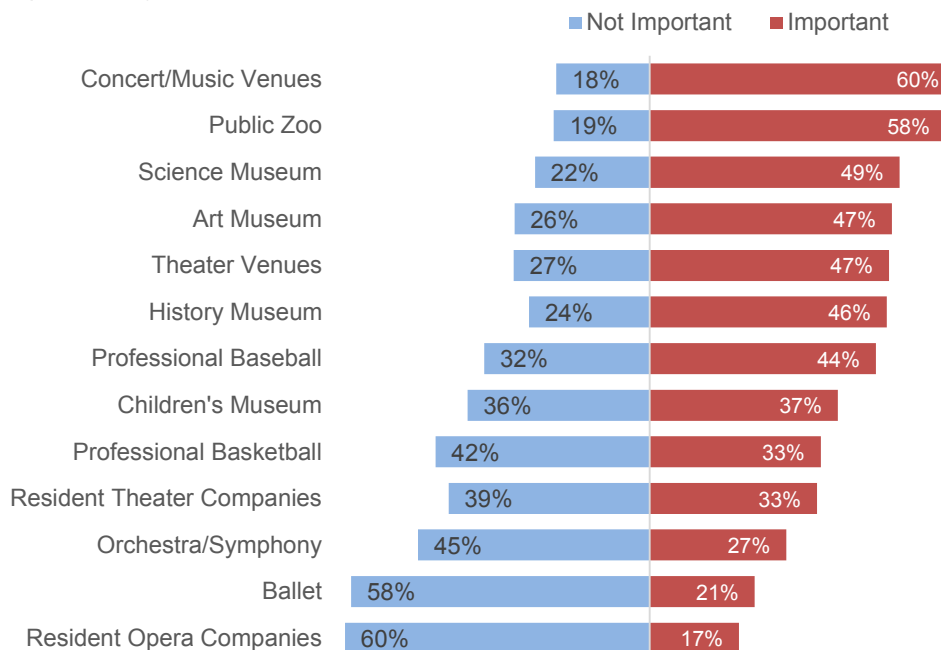
THE VIEWS OF METRO MILWAUKEE MILLENNIALS ON CULTURE AND ENTERTAINMENT

Several of the questions described above touched on Metro Milwaukee's entertainment and cultural offerings. Nevertheless, given the recent debate on a new arena for the Milwaukee Bucks and ongoing discussions among business, civic, and elected leaders regarding the need for additional investment in the area's cultural and recreational amenities, we wanted to dig deeper. Consequently, we asked two additional questions about culture and entertainment in Metro Milwaukee.

First, we asked respondents to think about the importance of specific cultural and entertainment amenities to their general decision-making regarding the metro region in which they would like to live. For our four-county sample of millennials, concert/music venues and a public zoo topped the list as amenities most frequently cited as important. In fact, those were the only two cultural or entertainment amenities that more than 50% of respondents cited as important in their decision on where to live.

At the bottom of the list were theater, orchestra, ballet, and opera. Also, professional basketball registered as important with only 33% of respondents, with 42% saying the existence of an NBA franchise was not important as a factor in determining where they would like to live.

How important are the following cultural & entertainment amenities when considering a metro area in which to live?
(All respondents)

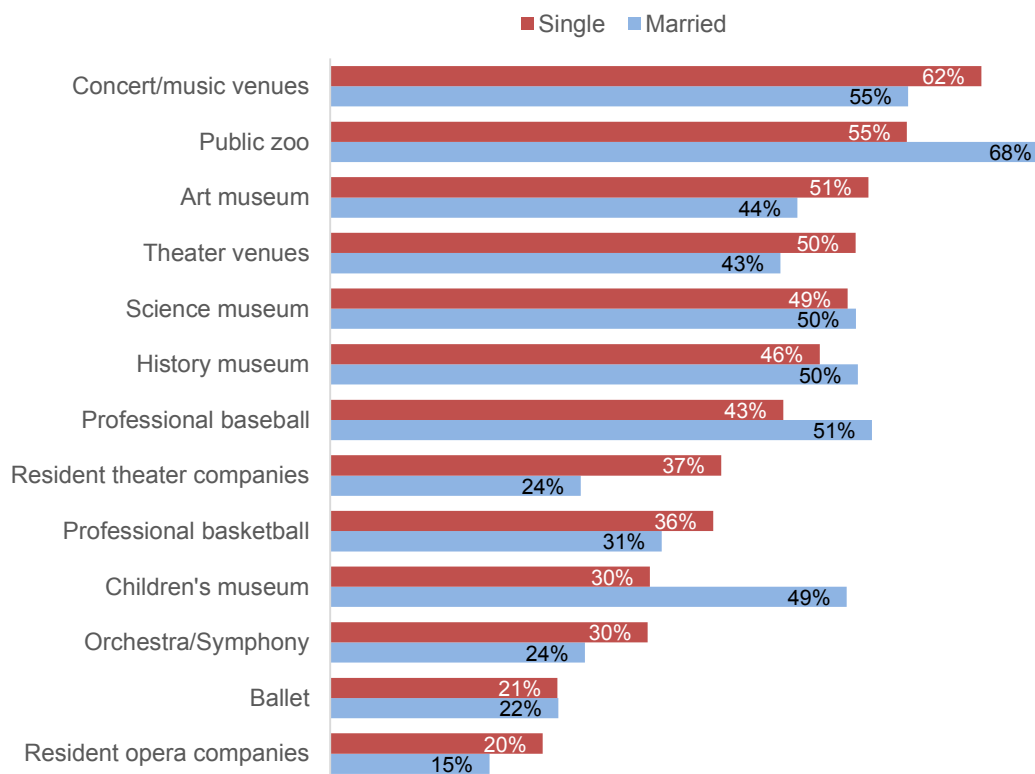


60%
of millennials
cite the
importance of
concert/music
venues in
determining the
metro region in
which they would
like to live



For the most part, we did not observe substantial differences in responses to this question between city and non-city residents. However, we did see some noticeable differences in responses between married and single millennials. While some were intuitive – such as greater importance being placed by married millennials on a public zoo and children’s museum given that a higher percentage have children – our survey suggests that single millennials may place greater importance on other cultural and entertainment amenities (though only for resident theater companies is the difference statistically significant). This might be explained by the fact that fewer single millennials have children and may have more opportunity to frequent such amenities. Another noticeable distinction involved professional baseball, which registered as important more frequently with married than single millennials (though again, the results are suggestive but not statistically significant at a 95% confidence level).

How important are the following cultural & entertainment amenities when considering a metro area in which to live?
(Marital status)



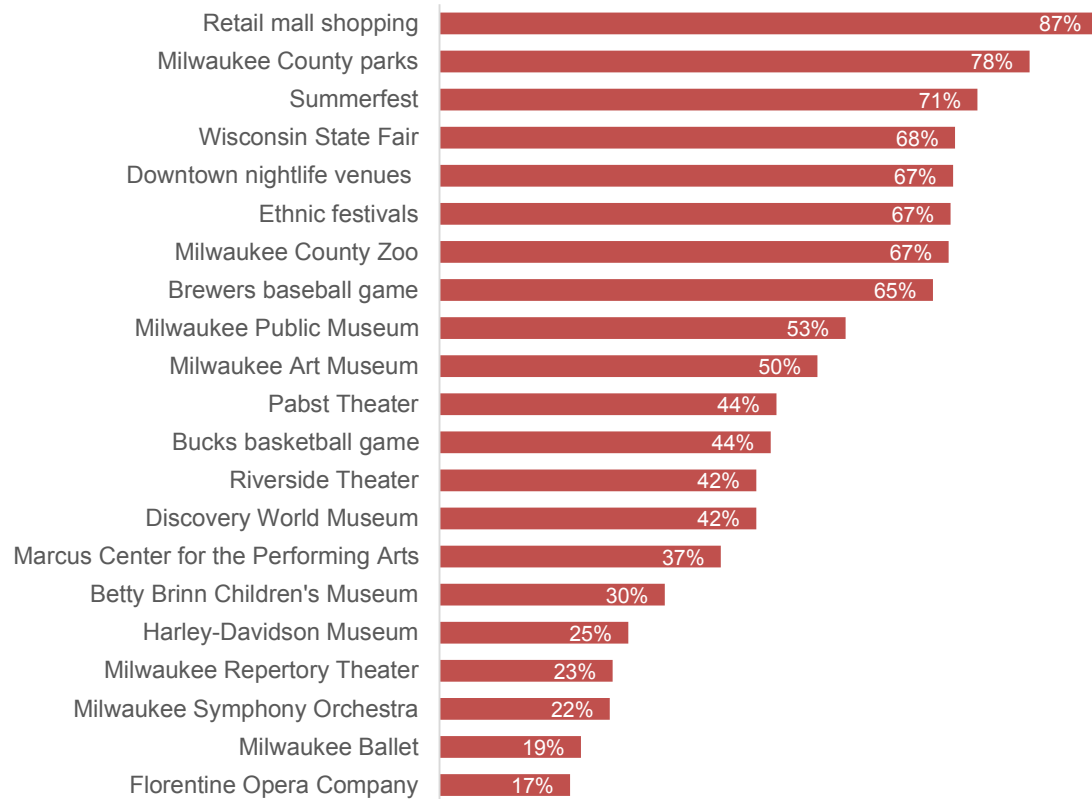
Next, to get a better sense of the extent to which Metro Milwaukee millennials frequent the region's existing array of cultural, entertainment, and related amenities, we cited a list of 21 amenities (including retail mall shopping and downtown nightlife venues) and asked respondents to tell us how often they attended in a given year.

With regard to cultural, recreational, and entertainment amenities, topping the list of those that millennials say they have attended at least once in the past year were Milwaukee County parks (78%), Summerfest (71%), and State Fair (68%). In addition, ethnic festivals, the Milwaukee County



Zoo, and Milwaukee Brewers baseball were attended at least once in the past year by about two-thirds of respondents. At the bottom of the list was the Florentine Opera Company (17%), followed by the Milwaukee Ballet (19%) and Milwaukee Symphony Orchestra (22%). About 87% of respondents said they had visited a retail mall in the past year and 67% said they had frequented downtown nightlife venues.

Percentage of Metro Milwaukee millennials attending area attractions at least once in the past year
(All respondents)

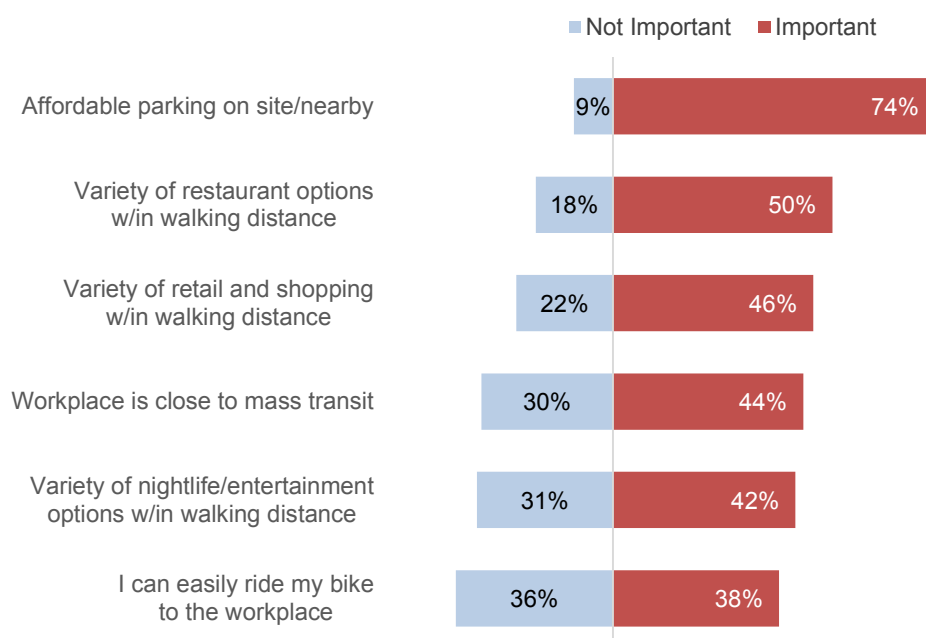


METRO MILWAUKEE MILLENNIALS AND THE WORKPLACE

The final focus of our survey was millennials' views on the location of their workplace, which we considered to be an important topic given the emphasis that has been placed on new office development and expansion in Milwaukee, and particularly in the downtown area.

We started by asking respondents to think about the ideal location of their workplace, and to assess the importance of various factors related to location. Of the five factors we cited, "affordable parking on site or nearby" was at the top of the list by a wide margin, registering as important with nearly three quarters of respondents. Next was "variety of restaurant options within walking distance" with 50%. None of the other factors were deemed important by a majority of respondents though again, a greater percentage said each factor was important than not important.

How important are the following factors when thinking about the ideal workplace?
(All respondents)

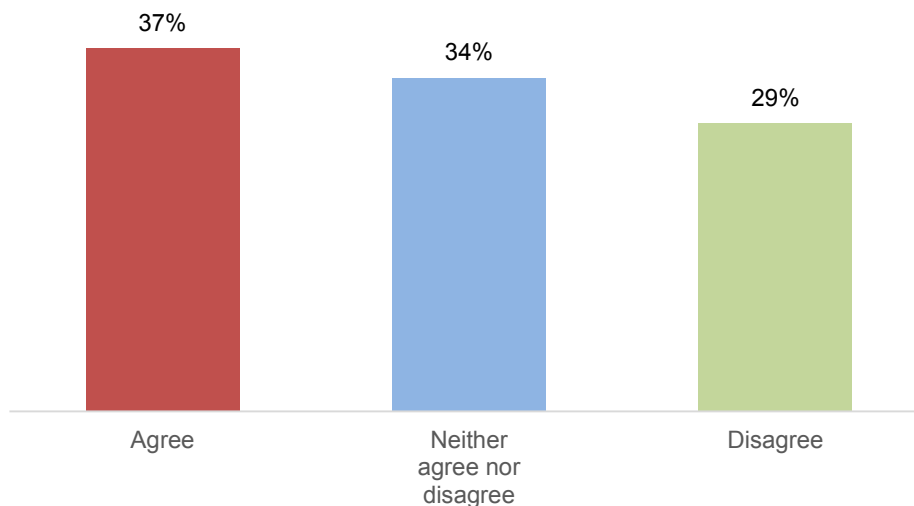


74%
of millennials
view affordable
parking on site or
nearby as an
important factor
in their ideal
workplace

Next, we specifically asked millennials about the extent to which they agreed or disagreed with the statement that "Downtown Milwaukee is the location in Metro Milwaukee where I would most like to work." About 37% agreed with that statement and 29% disagreed, with the remaining 34% expressing neither agreement nor disagreement.

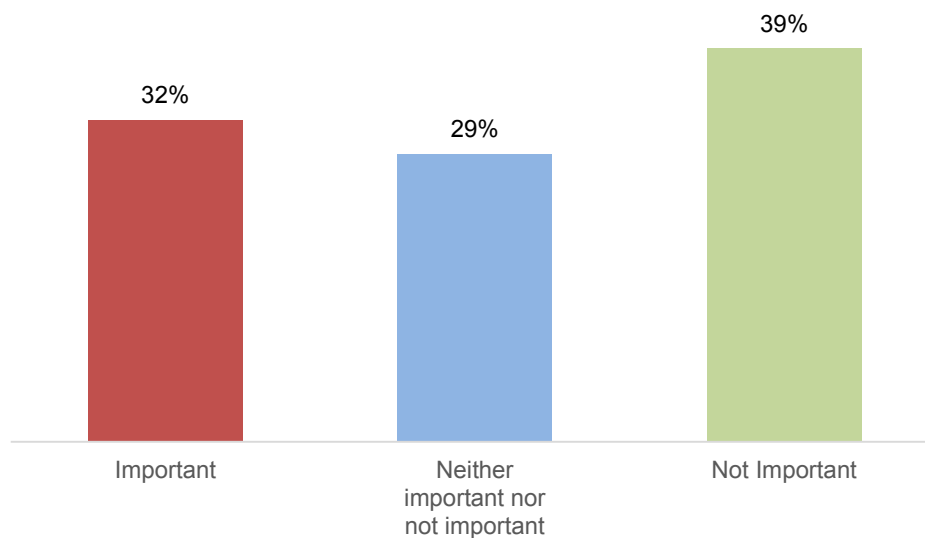


Percentage of Metro Milwaukee millennials who agree that downtown Milwaukee is the location in the Metro Milwaukee area where they would most like to work
(All respondents)



Finally, we asked our respondents how important it was for them to live within walking distance of their workplace. About 32% said living within walking distance is important, while 39% said it is not important and 29% were neutral.

Percentage of Metro Milwaukee millennials who say it 's important to live within walking distance of their workplace
(All respondents)



CONCLUSION

As noted in the Introduction and throughout this analysis, we would urge caution in using these survey data to draw firm conclusions about what Metro Milwaukee millennials think, or as a primary tool for developing strategies to attract millennials from outside of the region. We acknowledge that the survey responses can be interpreted in numerous ways and we surmise that they likely will be by individuals who have distinct opinions on various policy issues.

Nevertheless, we believe this survey of Metro Milwaukee millennials yields several important observations and policy implications that all citizens and policymakers should objectively consider, including the following:

- **Crime is a prominent issue in determining where Metro Milwaukee millennials wish to live and in shaping their views of the City of Milwaukee.** Our survey results show that 86% of Metro Milwaukee millennials consider the crime rate to be an important issue in their choice of location and 51% cite a high crime rate as what they like least about the city. Whether these views are based on perception or reality, they suggest that this issue ought to be considered on a par with others like culture, entertainment, and transportation by those who are working on strategies to attract and retain talented millennials. In particular, as the Forum has suggested in the past, the revenue constraints that may impact the City's capacity to pay for a desired level of public safety services – and to appropriately invest in social and economic initiatives that may address some of the roots of crime – should be contemplated as part of the talent recruitment and retention discussion.
- **While infrastructure related to transit, biking, and walking is important to a substantial percentage of Metro Milwaukee millennials, automobile-related infrastructure is important to even greater numbers.** The contention of pro-transit and New Urbanist groups that millennials place greater value on walkable communities and auto-free lifestyles than previous generations is neither confirmed nor refuted by our survey results. More than two thirds of our respondents view pedestrian-friendly streets as important, while more than half view downtown transit connections and regional transit service as important. However, greater numbers of millennials (more than 70%) cite the importance of well-maintained and relatively uncongested local roads and highways, and nearly two thirds support additional highway capacity. These results indicate that another of our common refrains – that the region come together to support both improved roads/highways *and* better transit – should apply to those considering ways to attract and retain millennials in Metro Milwaukee.
- **Metro Milwaukee millennials view the region's cultural, recreational, entertainment, and nightlife options as a strength.** Metro Milwaukee's variety of restaurants and cafes, cultural and educational attractions, parks and trails, and concert and music venues all ranked highly in terms of their importance to millennials in choosing to live here. Meanwhile, the variety of entertainment options and activities was the most common response (cited by 40% of those surveyed) when millennials were asked to cite what they like best about the City of Milwaukee. Whether these results suggest that regional leaders should focus on creating *new* cultural, recreational, and entertainment options to attract and retain millennials is open to debate; however, those arguing that the region needs to invest in the major institutions and amenities it currently possesses would appear to be supported by our survey findings.



Overall, we would suggest that, as with the general population, the views of millennials may be shaped just as much by individual experience, family circumstances, income and education levels, and other socioeconomic and demographic factors as they are by the year in which they were born. That does not mean that certain traits observed in millennials and supported by this and other surveys should be discounted; it does suggest, however, that the attitudes and behaviors of millennials are driven by a variety of factors, in addition to the impact of the era in which they were born and raised. Consequently, efforts to link specific public policy decisions to the perceived views of an entire generation of individuals should be viewed with caution.

