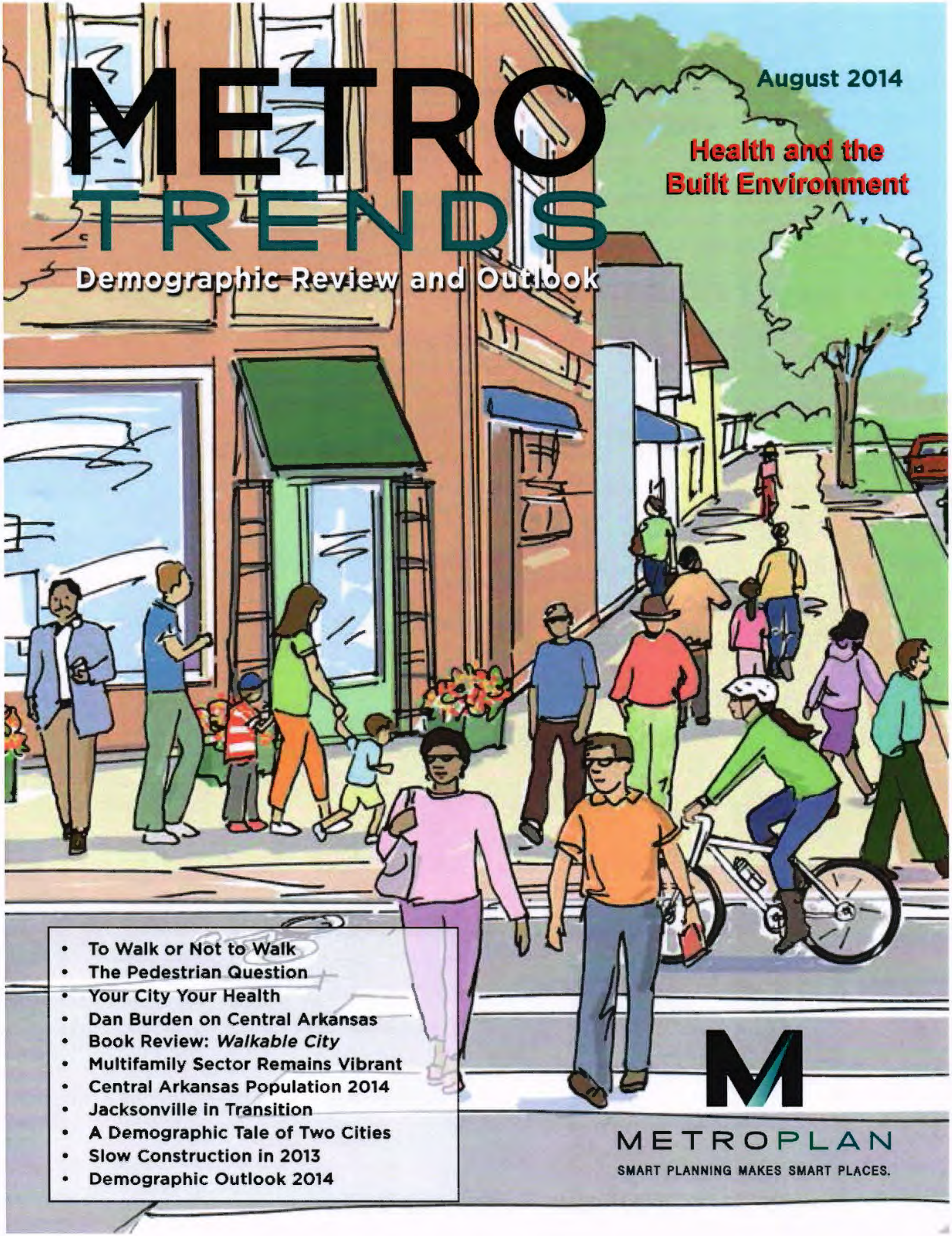
METRO TRENDS

Demographic Review and Outlook

August 2014

Health and the Built Environment



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METROPLAN

SMART PLANNING MAKES SMART PLACES.

About Metroplan

Metroplan is a voluntary association of local governments that has operated by interlocal agreement since 1955. Originally formed as the Metropolitan Area Planning Commission of Pulaski County, Metroplan now has members in the six-county metro area (see below). Metroplan is the designated metropolitan planning organization (MPO) under Title 23 of the United States Code.

Metroplan serves as the regional voice on issues affecting Central Arkansas, develops transportation plans required by federal law, convenes stakeholders to deal with common environmental issues, and provides information and staff resources to its member local governments, the business community and the public. As part of that mission, Metroplan publishes Metrotrends twice yearly. The spring edition is the Demographic Review and Outlook; the fall edition is the Economic Review and Outlook.

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Metroplan's Demographic Review and Outlook is an annual chronicle providing demographic and housing data and insight for the Little Rock-North Little Rock-Conway MSA.

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This report was funded in part through grant(s) from the Federal Highway Administration and Federal Transit Administration, U.S. Department of Transportation. The views and opinions of the authors expressed herein do not necessarily state or reflect those of the U.S. Department of Transportation.

To Walk or Not to Walk

If a picture can say things that text cannot, these photos almost jump off the page. The man is crossing one of the most unsafe streets for pedestrians in Central Arkansas (Pike Avenue in North Little Rock) with many injuries, including fatalities, on record. You might ask "why cross at such a dangerous spot?" He may have little choice. The area has lower-than-average auto ownership levels, and the only grocery store happens to be on the street's eastern side. How else is a carless resident of the street's western side supposed to get there? How far must he/she walk up or down the street to find a safe crossing? Even if he/she can find a striped, marked crossing with a pedestrian light, is it really safe, when cars and trucks make speeding right and left turns?

Like most U.S. metro areas, Central Arkansas has plenty of streets and highways slicing through its urban fabric, making walking, biking, or using a wheelchair difficult and dangerous in many areas.[1] We all utilize these streets and highways. Trucks use these vital arteries to deliver to stores, helping even carless customers to access groceries. But for too many people, getting out and walking — to run errands, exercise, or just meet the neighbors — isn't an option.

Sometime over the past sixty years, cars and trucks took over our cities. Streets and freeways were extended and widened to make room for all the traffic. They opened up options, allowing greater choices in jobs, education, entertainment and all the other things that make urban life prosperous and exciting. Destinations became more spread out, as retailing, then offices moved closer to where the majority of the population had gone to live, in low-density suburbs. Somewhere along the way, all this auto-mobility began to limit other ways of getting around, like walking or taking transit. To quote the philosopher Ivan Illich, "Beyond a certain speed, motorized vehicles create remoteness which they alone can shrink."[2]

No trend continues forever, though, and in recent years a new trend has begun taking shape. Some residents, community leaders and developers are reclaiming neighborhoods as walkable mixed-use districts. Public-opinion polls and economic indicators like property values suggest there is still plenty of unmet demand for walkable neighborhoods. This edition of the *Metrotrends Demographic Review and Outlook* explores this possibility of a more walkable future, the linkage between built environment and the people who live in it, and how this linkage affects personal freedom, mobility, and even health.

There is nothing compulsory about pedestrian activity, and no doubt many people will continue opting for low-density, car-dependent neighborhoods, jobs and shopping areas. Taking a walk, or riding a bike, is a personal choice. Unless you have no alternative, or the urban built environment makes walking impossible. **M**

[1]At times in this edition terms like "walking" and "walkability" are used for brevity, but in all cases they refer to biking, wheelchair use, and other forms of small-scale personal mobility.
[2]Ivan Illich, *Toward a History of Needs*. Cited in *Walkable City* by Jeff Speck, p. 102.

The Pedestrian Question

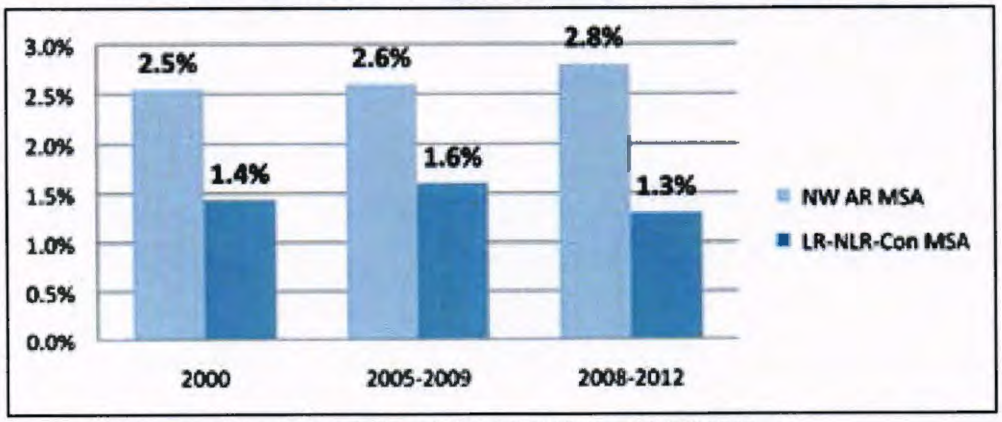
On the surface, pedestrian activity — walking and biking, mainly — is a minor part of the transportation picture. In 2009, for example, walking accounted for just 10 percent of all person-trips in the U.S.A.[1] Pedestrian accessibility is, however, becoming a factor in regional economic growth, and an important land value multiplier. Even if the majority of destinations are reached in vehicles, people often want to walk once they get there. People are also putting a higher value on living in pedestrian-friendly neighborhoods. For example, a study in Charlotte, North Carolina showed that each point higher on the 100-point Walkscore scale correlated with a $2,000 increase in housing value.[2] A growing body of evidence makes it clear that people who live in walkable, bike-friendly areas have better health, and are less prone to obesity.

Statistics on local pedestrian activity are limited, but work commuting data collected by the Census Bureau provide approximations. The map at right (opposite page) shows the share of residents using pedestrian modes to work (walking or bicycling) by census tract. Not surprisingly, greater pedestrian activity correlates with areas of higher density, such as downtown Little Rock and Conway, and college campuses. Greater pedestrian commuting is also found in some lower-income tracts south and southeast of the regional center. The cores of smaller suburban towns like Benton, Bryant and Cabot also show a slightly higher-than-average share of residents using pedestrian means of getting to work.

The chart below compares the share of walk and bike commuters from 2000 through 2012 in the Central Arkansas and the Northwest Arkansas metropolitan areas. The share using pedestrian modes to work has declined slightly in Central Arkansas, but has risen steadily in Northwest Arkansas. Both regions boast substantial and growing trail systems, but the trends suggest that trail improvements in Northwest Arkansas have better assisted work trips, by connecting housing with jobs. The Northwest Arkansas region's higher score in all years can also be attributed to its larger college population.

The chart below right (opposite page) compares the share of workers biking and walking to work among several U.S. metros. Central Arkansas has one of the lowest share of such work commutes, ranking 343rd among 366 U.S. metro areas. The U.S. metro average, 3.4 percent, is slightly higher than the figure in Northwest Arkansas. Even Houston, not noted for pedestrian-friendliness, ranks slightly higher than the Central Arkansas region, while Portland Oregon ranks 39th among U.S. metros, with nearly six percent of its workers walking or biking to their jobs. Using muscle power to get to work isn't for everybody, but can have benefits for personal health, and perhaps for local economic development. While not always feasible or practical, it's a nice option to have. **M**

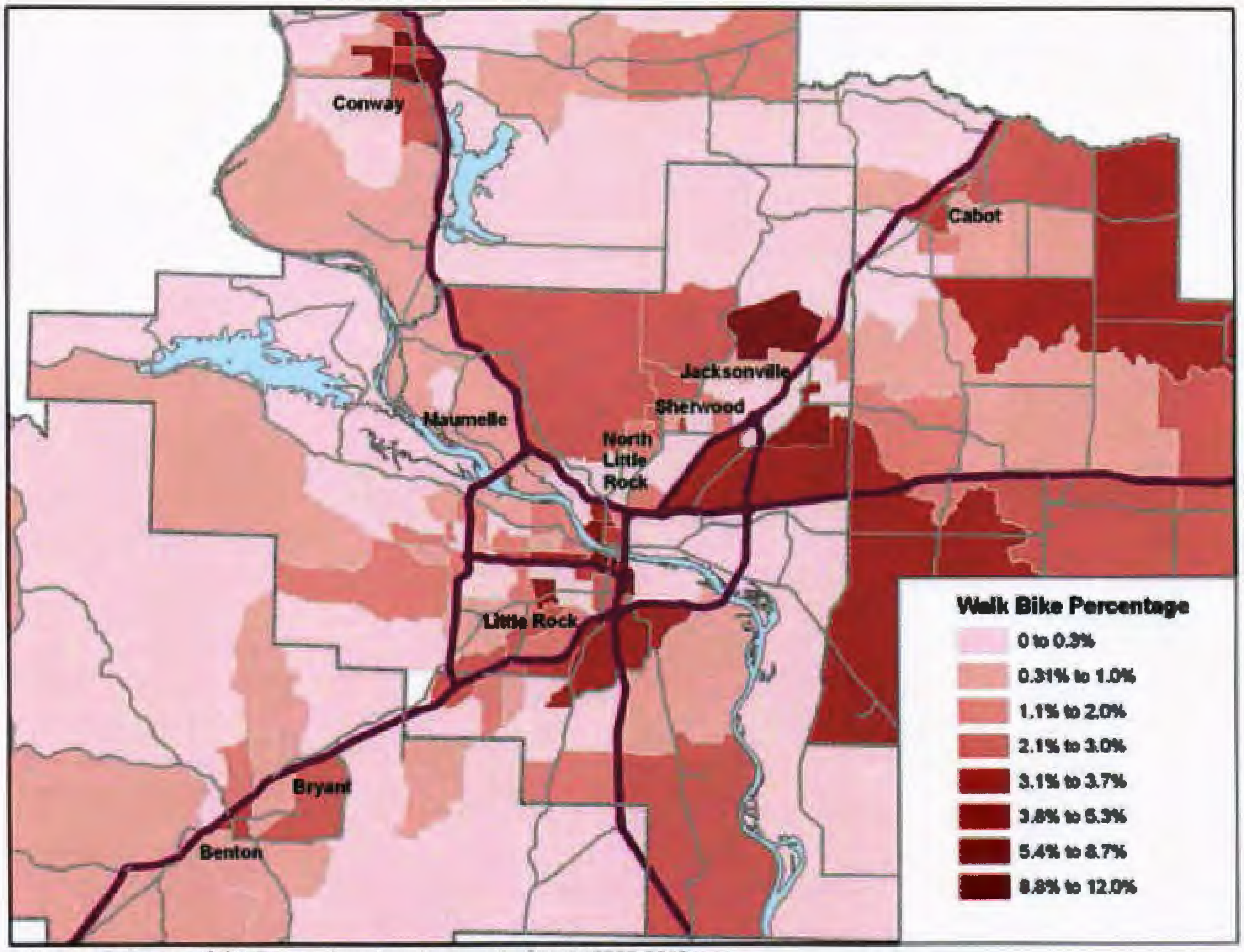
Share of Commuters Biking or Walking to Work 2000–2012



Source: U.S. Bureau of the Census 2000 and ACS 2005-2009 and 2008-2012.

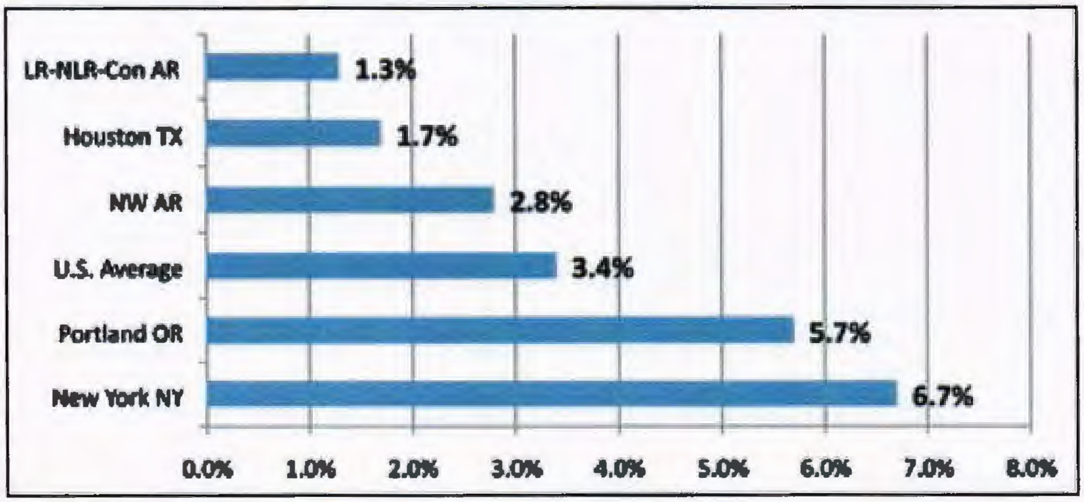
[1] *2009 National Household Travel Survey*, U.S. Department of Transportation.
[2] Type in any address at http://walkscore.com to see a measure of walkability.

Percent of Work Commutes by Foot or Bike 2008-2012



Source: U.S. Bureau of the Census, American Community Survey 2008-2012.

Share of Commuters Biking or Walking to Work 2008-2012



Source: U.S. Bureau of the Census, American Community Survey 2008-2012.

Your City Your Health: How the Built Environment Affects How Well — and How Long — You Live

In the nineteenth century, the fields of urban design and public health were closely correlated.[1] Then they developed in different directions. Early in the twenty-first century, urban thinkers began rediscovering an old truth: there is a close link between people's health and the environment in which they live. To be healthy, people must be active. The urban landscape affects people's inclination to get out and walk. Yet the vast majority of our urban environments have spread and been cut up by highways and parking lots. In a classic example of what engineers might call "over-design," cities and suburbs have developed that serve cars and trucks first, and people second.

Academic research shows that frequent low-level activity offers the best path to good health. You need not be a marathon runner, but you should not be sedentary. Depending solely on cars to run errands and commute to work reinforces sedentary tendencies, and may increase other health risks. The longer people commute, the greater the risk they run. A study in Germany has even correlated time spent in traffic with substantially elevated heart-attack risk.[2]

The table below gives some figures collected by the Robert Wood Johnson Foundation on health risk factors that relate to the urban environment. The figures given are percentages of population, so for example 32 percent of Grant County residents polled for the study admitted to being physically inactive.

Percent of Population with Risk Factors 2014

County / Region	Obesity	Physical Inactivity	Exercise Access	Long Commute
Faulkner	29	29	40	37
Grant	36	32	22	49
Lonoke	31	29	35	44
Perry	34	31	28	55
Pulaski	33	30	89	19
Saline	32	29	46	42
LR-NLR-Con MSA	32	30	66	29
U.S.A.	25	24	76	33

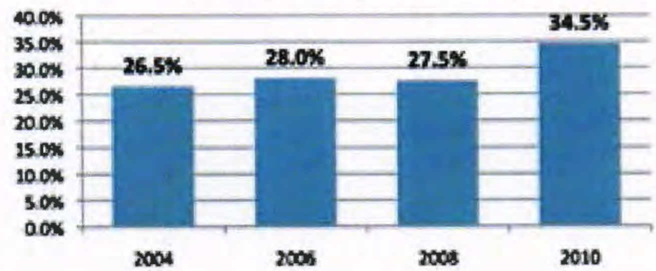
Source: Robert Wood Johnson Foundation, Countyhealthrankings.org.

Explanation: The figures represent percent of adult population. In the case of long commutes, the figures represent share of working adults with commutes over thirty minutes each way.

Why It Matters: The Benefits of Walkability

- People in walkable neighborhoods weigh 6-10 lbs less.
- Walkable places make you happier and healthier.
- Your property is worth more in walkable places.
- Short commutes reduce stress and increase community involvement.

Share of Central Arkansas Adults 18+ Who Are Obese 2004–2010



As you can see, all of the region's counties rank above the U.S. average in obesity, and local residents tend to be less physically active than average. In exercise access there was more variation, with 89 percent of Pulaski County residents reporting access to exercise (well above the U.S. average) against just 22 percent in Grant County. Pulaski County residents also showed a smaller share of long commutes, while larger shares of population in outlying counties reported commuting over 30 minutes each way on a daily basis.

As the chart above shows, regional obesity has been worsening over the years, recently reaching about 34 percent of the population. Dietary habits have something to do with this, but it is probably no coincidence that the region also ranks well above the U.S. average in miles driven per capita. Time spent in cars is exercise time lost. More importantly, spending so much time in cars suggests a lack of alternative ways to commute, shop, and seek entertainment. **M**

[1] *Urban Sprawl and Public Health.* U.S. Centers for Disease Control, 2002.
[2] Jeff Speck, *Walkable City.* North Point Press, 2012, p. 48.

Dan Burden on Central Arkansas

Dan Burden is recognized by many as the national guru on walkability in urban areas, and has visited Arkansas several times. He led "walking audits" for Metroplan's five Jump Start projects in Bryant, Conway, Little Rock and North Little Rock. While at a hub airport awaiting his next flight and pedestrian project, he spared a few minutes for a phone interview with Metroplan staff:

- Dan has done 3,500 walking audits across the U.S.A. He likes Arkansas people, whom he finds "very genuine and sincere, they want to help. They're open and honest."
- Dan believes leadership is a vital factor, and successful leaders come from many backgrounds, including business and community groups, while others are citizen activists and politicians.
- Health issues like obesity, cardiovascular disease and inactivity are most severe in the south-central U.S., not just Arkansas but also Louisiana, Mississippi, Tennessee and other nearby states. "It's at the heart of the national problem," Dan says.
- It's not enough for public agencies to just improve streets and sidewalks. Dan contends that merchants and area businesses are vital players in successful place-making.
- Northwest Arkansas is putting large sums of money — about half government and half private — into greenways and trails. It will be an emerging model, "an example for other regions to follow."
- Another housing bust is probably coming. He believes developers don't understand that "Single-family detached housing is exotically overbuilt. We need to build more multi-family housing."
- The Millennial Generation is vital because "they have the capacity to build small communities and pick where they live... Jobs are tied to place-making and can make an area come back alive."

Dan Burden is Executive Director of the Walkable and Livable Communities Institute. You heard it from the source. M

Getting Healthy, Losing Weight by Walking

Ginny McMurray was determined to lose some weight and get more active. Four years ago, with the help of a walking program and some striding buddies, she lost over 55 pounds, and kept it off. Ginny and her husband enjoy traveling, and Ginny didn't want anything to slow her down. She started by walking a three-mile route with friends, later working up to six miles and more.

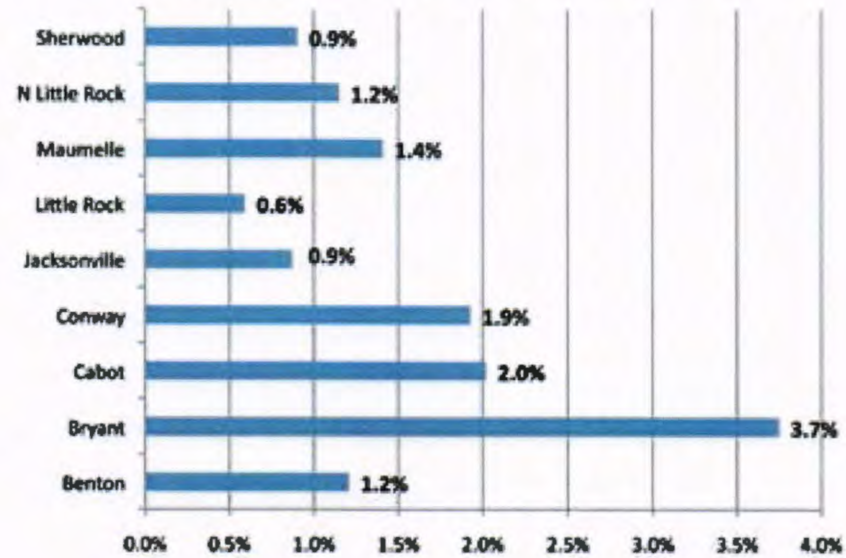
Ginny commutes from Little Rock to her job as Director of Foundation Relations at Hendrix College in Conway. She doesn't let the long drive get in the way, though. She gets up early and walks before work, or uses an indoor pool or home exercise when bad weather interferes. On weekends she often hikes the Arkansas River Trail with friends. Not everybody can match Ginny's intensive walking regime. But medical research shows that, for most people, adding even a few steps to your daily routine is one of the simplest ways to better health. M

Ginny and her friends call themselves the "Walkie Talkies." Here they pose for the camera on one of their favorite routes, the Junction Bridge in Little Rock. Right-hand photo courtesy of Ginny McMurray.

Central Arkansas Population 2014: More of the Same, or New Directions?

Metroplan's 2014 estimates show a general slowdown in regional growth. Since 2010, regional growth has averaged 1.1 percent annually, a bit down from 1.4 percent during the 2000-2010 decade. The regional growth pace remains faster than state and U.S. population growth, however. Within the region, Saline County is now the fastest-growing, having gained population at an estimated 2 percent annual rate, slightly lower than the county's 2.5 percent annualized growth the previous decade. Faulkner County dropped into second place, growing 1.7 percent, down from 2.8 percent the previous decade.

Population Growth 2010-2014 (Annualized)



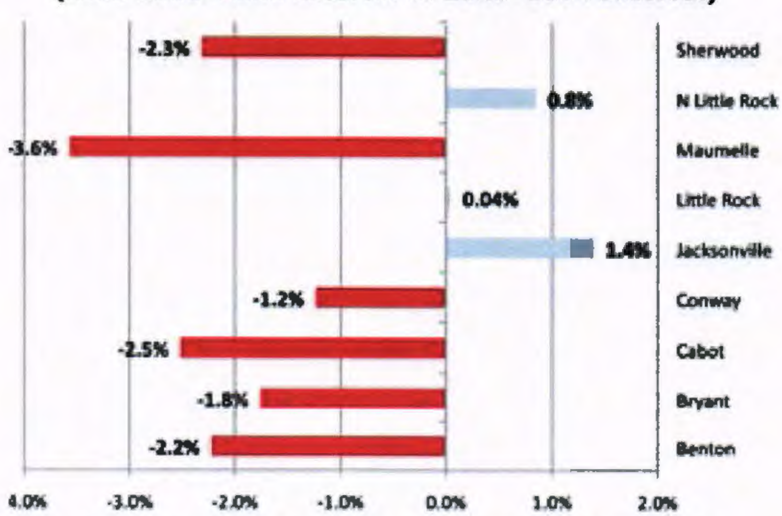
The chart at top right shows annual population growth for the region's nine largest cities. Bryant has outpaced them all, with a 3.7 percent annual pace. This is likely to slow in coming years, with new restrictions on the multi-family construction which was contributing to this fast growth. Cabot and Conway vie for second and third fastest-growing.

Superficially, then, the region's suburban cities remain its fastest-growing, as in previous decades.

Statistics are complex, however, and can be looked at in different ways. The chart at left looks at the change in annualized city growth rates in the 2010-2014 interval, compared with growth in the 2000-2010 decade. As one can see, this chart shows a dramatic shift. The pace of growth has slowed in all cities except Little Rock, North Little Rock, and Jacksonville. Little Rock is growing a tiny bit faster than during the previous decade. North Little Rock has gained by 0.8 percent, in other words shifting from an anemic 0.3 percent growth rate to a more robust 1.2 percent. Most of this growth has been driven by intensive apartment construction in the city's western portion adjacent to Maumelle. Jacksonville, meanwhile, has reversed its decline from 2000 to 2010, and is now growing again.[1]

The resilience of growth in the region's central area can also be seen in the slight up-tick in Pulaski County's overall population growth, from

Change in Annualized Population Growth (from 2000–2010 Interval to 2010–2014 Interval)



Sources: Decennial census 1970-2010; Metroplan estimates for 1/1/2014

[1] See "Jacksonville in Transition", p. 10..

Little Rock-North Little Rock-Conway MSA Population Change 2010–2014

Faulkner County	2010	2014	Change
Conway	58,908	63,278	7.4%
Greenbrier	4,706	5,095	8.3%
Mayflower	2,234	2,365	5.9%
Vilonia	3,815	4,254	11.5%
Wooster	860	949	10.3%
Small communities	2,245	2,434	8.4%
Unincorporated	40,469	42,181	4.2%
County Total	113,237	120,556	6.5%

Grant County	2010	2014	Change
Sheridan	4,603	4,877	6.0%
County Total	17,853	18,045	1.1%

Lonoke County	2010	2014	Change
Cabot	23,776	25,627	7.8%
Austin	2,038	2,239	9.9%
Ward	4,067	4,538	11.6%
Lonoke	4,245	4,290	1.1%
England	2,825	2,697	-4.5%
Carlisle	2,214	2,123	-4.1%
Small communities	751	729	-2.9%
Unincorporated	28,440	28,879	1.5%
County Total	68,356	71,122	4.0%

Perry County	2010	2014	Change
Perryville	1,460	1,461	0.1%
County Total	10,445	10,330	-1.1%

Pulaski County	2010	2014	Change
Little Rock	193,524	197,870	2.2%
North Little Rock	62,304	65,037	4.4%
Jacksonville	28,364	29,303	3.3%
Sherwood	29,523	30,537	3.4%
Maumelle	17,163	18,089	5.4%
Wrightsville	2,114	2,132	0.9%
Cammack Village	768	756	-1.6%
Alexander*	236	244	3.4%
Unincorporated (N)	25,410	25,346	-0.3%
Total North of River	162,764	168,312	3.4%
Unincorporated (S)	23,342	23,283	-0.3%
Total South of River	219,984	224,285	2.0%
Total Unincorporated	48,752	48,629	-0.3%
County Total	382,748	392,597	2.6%

Saline County	2010	2014	Change
Benton	30,681	32,094	4.6%
Bryant	16,688	19,158	14.8%
Shannon Hills	3,143	3,500	11.4%
Haskell	3,990	4,524	13.4%
Alexander*	2,665	2,709	1.7%
Traskwood	518	511	-1.4%
Bauxite	487	513	5.3%
Unincorporated	48,946	52,516	7.3%
County Total	107,118	115,525	7.8%

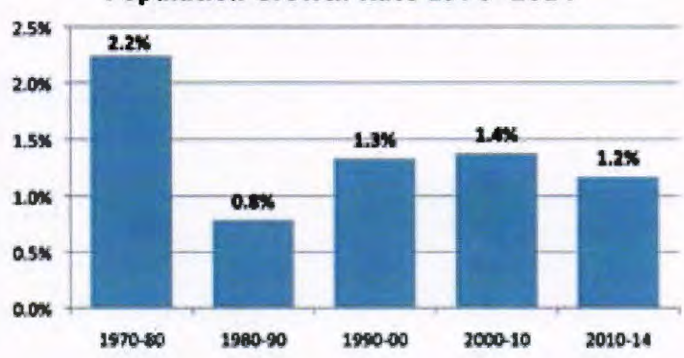
Hot Springs Village CDP (Unincorporated area)	2010	2014	Change
In Saline County	6,046	6,331	4.7%
In Garland County	6,761	6,908	2.2%
HSV Total	12,807	13,239	3.4%

City of Alexander Total (County splits shown above)	2010	2014	Change
Alexander	2,901	2,953	1.8%

4-County Region	671,459	699,800	4.2%
6-County MSA**	699,757	728,175	4.1%

*Represents portion of Alexander by county.
**Official MSA since May 2003

Central Arkansas Regional Average Annual Population Growth Rate 1970–2014



0.6 percent 2000-2010 to 0.7 percent from 2010 to 2014. This change is minor in statistical terms, but marks a definite shift in the trend from the 1980s and 1990s, when Pulaski County was barely growing at all, and seemed poised on the brink of decline.

Regional population will continue to change in ways hard to foresee. For the moment, the suburbs are still growing faster than the central area, but at a slower pace than in past decades. The central area, while still growing slowly, has picked up just a bit. M

Book Review: *Walkable City*

Jeff Speck's *Walkable City* is a timely introduction to the pedestrian revolution reshaping U.S. urban landscapes. Speck contends that walkability is the core of urbanity, enabling face-to-face contact, chance meetings, economic exchange, entertainment and convenience. Cities that build walkability will nurture creative synergy, feeding high-end economic growth. On the downside, there is a close link between our auto-dependent suburbanized lifestyles and an epidemic in diseases like obesity and diabetes.

How do you make cities more pedestrian-friendly? The threshold of walkability begins around 10 to 20 housing units per acre, allowing room for grass and parks without Manhattan-style density. Private vehicles remain vital to cities, but they need not despoil the landscape. Those cities which have endlessly added road capacity to fix congestion are the biggest fuel users, and have the worst air pollution problems.[1] They also have above-average urban decay,[2] and high rates of *induced demand* — a tendency toward redundant and unnecessary trips, with no market mechanism charging drivers the actual cost. Congestion, Speck argues, is more often a sign of success than failure, signaling an urban district is ripe for redevelopment into a higher-density, more walkable landscape. Cities that have taken out urban freeways have seen neighborhoods blossom in their place, with *reductions* in congestion.[3]

The expectation that parking must remain "free" lies at the core of the urban problem. Almost all U.S. cities mandate parking, instead of letting the market determine parking need. Parking is the largest single land use in U.S. cities, yet its true costs are concealed in rents, store purchases, restaurant meals, employment costs and elsewhere. In many U.S. downtowns, says Speck, parking lots are "the missing teeth that make walking so unpleasant."

For all his intense pro-walking, pro-bike activism, Speck understands that large parts of modern metro areas must accommodate the airports, warehouses, factories and other land uses that work best with low-density, road-dominated formats. He recommends "urban triage," emphasizing selected urban areas and building strategic links between existing walkable nodes. Cities can thus gradually push the frontier of pedestrian- and bike-friendly urban landscapes outward, reaching more jobs and homes.

Downtowns are special, Speck contends, because "downtown is the only part of the city that belongs to everybody." In the end, walkability has everything to do with economic vitality and future potential: "Every relocation decision, be it a college graduate's or a corporation's, is made with an image of place in mind. That image ... is resolutely physical: a picture of buildings, streets, squares, cafes, and the social life that those places engender... with rare exception, that image is downtown."

Based on surveys of public demand and demographic trends, Speck sees U.S. cities on the brink of a walkable and mixed-use metamorphosis. Today mixed-use urban districts are scattered only in pockets across U.S. urban areas, but their presence has planted a seed in popular tastes. Most of them, including four in Central Arkansas,[4] were neglected or blighted areas just two decades back. Extrapolate that trend forward a few decades, and you can expect to see metropolitan areas that are more prosperous and livable, owned not by the cars and trucks that surge across them, but by the people who reside, walk and bike inside them. M

[1] Houston is a prime example, with long commutes, few walkable landscapes, and severe air pollution.
[2] Speck cites Detroit as an example of a city that "built itself out of congestion" by adding freeway capacity, thereby accelerating an eventual urban implosion.
[3] Examples include Harbor Drive in Portland, the Park East Freeway in Milwaukee, and the Embarcadero Freeway in San Francisco. With many U.S. freeways reaching the end of their service lives, and Federal Highway Trust Fund money drying up, Speck foresees an opportunity to replace more freeways with conventional streets, perhaps reconfigured into "best practice" walkable mixed-use landscapes.
[4] River Market (Little Rock), Argenta (North Little Rock) and Hendrix Village (Conway).

Multifamily Sector Remains Vibrant

The region's mix of new apartments is as varied in character as the region itself. This includes traditional, Class A suburban complexes, albeit with modern, state-of-art features and an expanded range of amenities. For example, The Pointe Brodie Creek, west of I-430 on south Bowman Road in west Little Rock, includes granite counter-tops, stainless steel appliances, and other condo-like features as well as a 78-seat movie theater, fitness center, and other high-value amenities that break with traditional perceptions of multifamily living. With 171 units delivered in 2013, The Pointe Brodie Creek has plans to deliver another 188 units in 2014 and 144 units in Phase III in 2015. Additional phases may be in the pipeline as well. Some of the new suburban units are very large. For example, the Villas at Chenal complex, a senior housing property, include several villas with two-car garages and 2,600 square foot floor plans, larger than many single-family homes.

Other new apartment construction includes urban, in-fill locations, such as the new 261-unit LIV Riverdale, a Class A mid-rise property now under construction in Little Rock's Riverdale neighborhood. It is within walking distance of many restaurants, boutique shops and the very popular River Trail. The Park Avenue Lofts, a recently-completed 258-unit property, is a series of mid-rise buildings on the site of the old University Mall. Park Avenue includes a mix of retail stores (anchored by Target), as well as numerous popular restaurants. The leasing absorption has been strong. The 78-unit Argenta Flats complex in downtown Argenta, scheduled for completion in October, hosts street-front units in an urban townhouse format, within easy walking distance of a branch library, several restaurants, and Verizon Arena.

Markets are also seeing the emergence of some small urban apartment units with square foot allotments in the 400-foot range, modest "sleeping pads" for young professionals who spend the bulk of their time at work, recreating outdoors, or at fitness centers, restaurants and other establishments. It's a local example of "micro-segmentation," market demands increasingly based on individual tastes, with more variation than in the past.

National housing figures have shown a major shift toward rental living since the housing crash upended U.S. housing markets in the 2006-2008 period. Locally the change has been less dramatic. In Pulaski County the share of renter-occupied units has risen modestly from about 38 percent in 2005 to 40 percent in 2012.[1] Nonetheless, multifamily and rental housing occupy a larger share of the housing market than before the Great Recession, and show plenty of momentum going forward. M

The Argenta Flats complex will add 78 units within downtown North Little Rock.

Artist's rendering of the new LIV Riverdale project currently under construction in Little Rock's Riverdale neighborhood. Image courtesy of LIV Development and the Multifamily Group.

[1] U.S. Bureau of the Census, American Community Survey.

Jacksonville in Transition

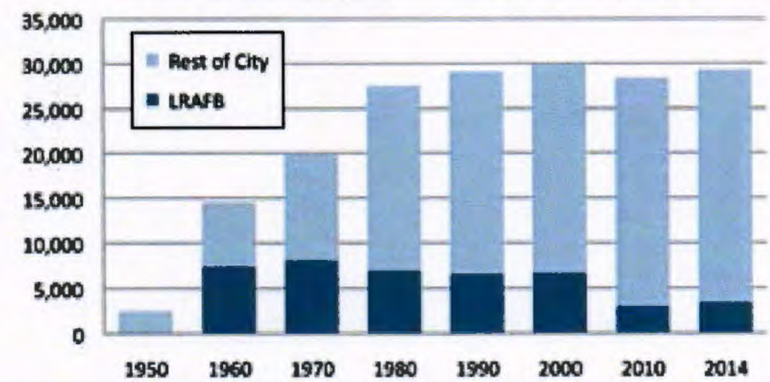
From the 1950s through the late 1980s, Jacksonville was one of the region's fastest-growing cities. First the Little Rock Air Force Base (LRAFB) was established during the mid-1950s, while Jacksonville also became a bedroom community for many people working in Little Rock or North Little Rock. During the late 1980s and 1990s population growth slowed, but continued. It was surprising, then, when Census 2010 showed a population loss of about 5 percent from Census 2000.

While growth has certainly slowed since Jacksonville's fast-growing years, it was a change in housing at the city's Little Rock Air Force Base (LRAFB) that really drove population decline from 2000 to 2010. The base demolished many old, small 1950s-era housing units. A few have since been replaced with larger, more modern units. At the same time, a growing share of personnel shifted to living off-base. From 2000 to 2010, total base population declined from 6,600 to 2,900 – a drop of over 50 percent.

Population decline on the base was large enough to impact the city's overall trend. The rest of Jacksonville grew slowly during the 2000-2010 decade, and continues growing. By 2014, the construction of several hundred new on-base housing units has caused base population to rise a bit from 2010.[1] For that reason, Jacksonville has an overall population of about 29,300 in 2014. This represents 3.3 percent growth over 2010. It looks like the city's decline was temporary, and growth has returned. M

The reduction of on-base housing at Little Rock Air Force Base in Jacksonville has influenced the city's population trend.

Jacksonville Population Trend 1950–2014



[1]Post-2010 housing figures from Little Rock Air Force Base and City of Jacksonville.

Walkability and Economic Development

The economic case for pedestrian-friendly cities challenges some aging assumptions that correlate automobile transportation with mobility and economic growth. Nonetheless, a growing body of economic evidence supports walkable urbanism. A recent study by the George Washington University School of Business analyzed the link between economic characteristics and walkability in the 30 largest U.S. metro areas. It found a distinct correlation between the presence of walkable neighborhoods and higher incomes.[1] A recent EPA study comparing the 50 states determined that the more miles people drive daily, the lower their productivity.[2] This last finding is particularly intriguing, since in theory the higher incomes of wealthier people should give them the choice to drive more, yet those who drive less produce more.

Not getting much done.

[1] Leinberger and Lynch, "The Foot Traffic Ahead," George Washington University, 2014.
[2] Kooshian and Winkleman, "Growing Wealthier: Smart Growth, Climate Change and Prosperity," U.S. Environmental Protection Agency, 2011.

A Demographic Tale of Two Cities

A downtown comeback is one of several factors behind renewed population growth in North Little Rock.

In 1950, Conway had 8,610 people, while North Little Rock had 44,097, and North Little Rock was growing faster. Over the decade leading to 1960, a housing construction boom shoved North Little Rock population up by 32 percent, while Conway grew just 14 percent, remaining for the most part a small and quiet college town.

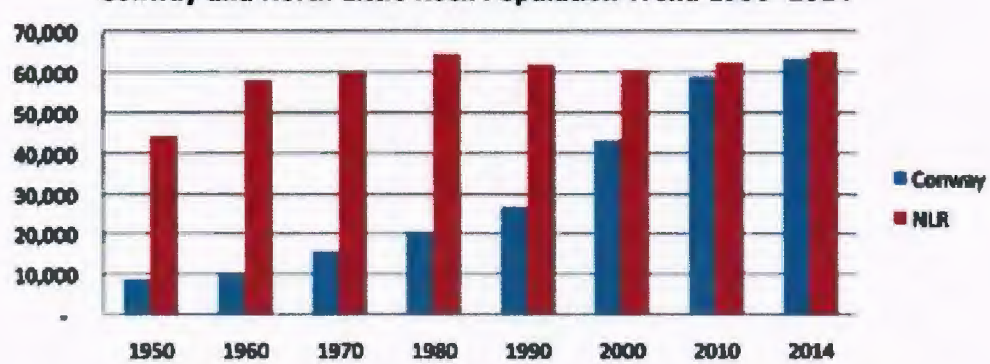
Then things began to change. In the late 1960s, Interstate 40 was completed past Conway. College enrollments were on the rise. Conway became a dynamic and fast-growing city. If you looked at the upward-sloping curve of Conway's population growth from 1960 onward, you would assume Conway was going to rocket past North Little Rock to become the region's second-largest city. It hasn't happened yet. Since late in the 2000 decade, Conway's population growth has slowed, while North Little Rock reversed its population decline. North Little Rock has seen housing growth in its eastern portions, near Lonoke County, in its downtown area, and (above all) a great deal of apartment construction on the city's western edge, near Maumelle Boulevard.

According to 2014 estimates, North Little Rock still has a larger population. With more room for low-density suburban growth, however, Conway is likely to come out ahead, possibly before Census 2020 is taken in six years. But obvious-looking trend-lines can change in unexpected ways, and we've been surprised before.

Conway's thriving downtown area is the core of a city that may soon be second-largest in Central Arkansas .

The presence of several colleges, especially UCA, was a factor in Conway's fast growth in recent decades.

Conway and North Little Rock Population Trend 1950–2014



Slow Construction in 2013

The year 2013 was a slow one for the local housing industry. The total number of housing units permitted was 2,094, lower than in the depths of the Great Recession and the slowest regional performance since 1992. The trend further demonstrates that housing markets have altered fundamentally in recent years.

Single-family housing was, for the second year running, the market's stronger segment. Overall totals were down 15 percent from 2012. Of the cities covered, Hot Springs Village and Sherwood were up from the previous year, while other cities were down, generally by modest amounts. Jacksonville's sharp apparent downturn should be viewed with caution, in light of major housing changes over the past several years at the Little Rock Air Force Base (see article, page 10). Comparison with the U.S. average, depicted at top right (opposite page) shows that the local market remains marginally stronger.

A new house at Bishop Place in western Little Rock, near Cantrell Road.

New Housing Unit Permits by City 2010–2013

Single-Family

	2010	2011	2012	2013
Benton	223	147	210	205
Bryant	157	144	143	110
Cabot	95	93	101	97
Conway	223	153	187	148
Hot Springs Vill.	68	53	45	72
Jacksonville	55	31	100	31
Little Rock	337	328	395	353
Maumelle	85	83	76	76
N. Little Rock	162	155	155	103
Sherwood	104	79	144	158
Total	1,441	1,213	1,511	1,281

Multi-Family

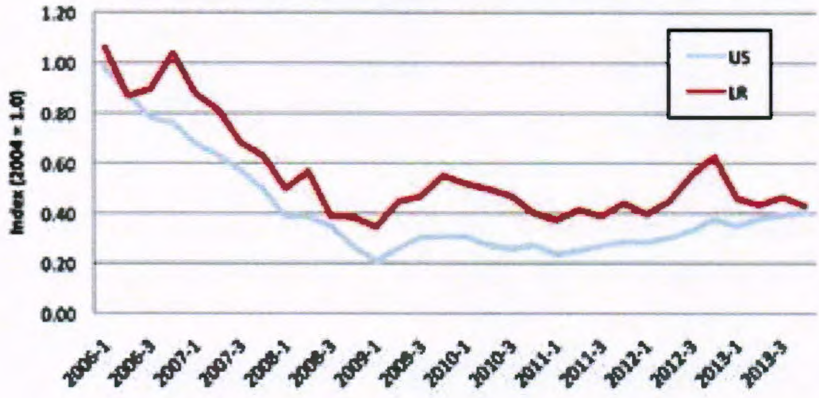
	2010	2011	2012	2013
Benton	6	0	0	0
Bryant	568	22	26	0
Cabot	55	24	308	0
Conway	736	14	144	152
Hot Springs Vill.	0	0	0	0
Jacksonville	6	0	8	0
Little Rock	214	1,022	275	265
Maumelle	0	0	108	0
N. Little Rock	210	461	488	396
Sherwood	0	0	0	0
Total	1,795	1,543	1,357	813

Units by Type and Overall Total

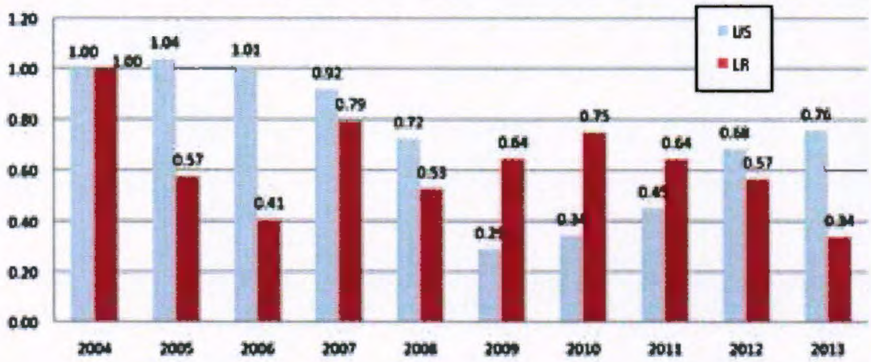
	2010	2011	2012	2013
Share Single-Family	44.5%	44.0%	52.7%	61.2%
Share Multi-Family	55.5%	56.0%	47.3%	38.8%
Total Units	3,236	2,756	2,868	2,094

Multi-family construction was sharply down to 813 new units, its lowest showing since 2003. Multi-family markets are prone to greater cyclical swings, and occupancy trends suggest the market continues absorbing newly-constructed units. The chart at middle right (opposite page) compares an index of local and U.S. multi-family construction. U.S. multi-family construction has rebounded steadily, from an index-value low of 0.29 in 2009 to 0.76 in 2013, suggesting a housing market transformation with rental becoming more commonplace. A local rebound in multi-family cannot be promised, but the national backdrop suggests it is a likely prospect, especially when coupled with the region's steady job gains in recent years and months. **M**

Quarterly Single-Family Construction Trend 2006-2013

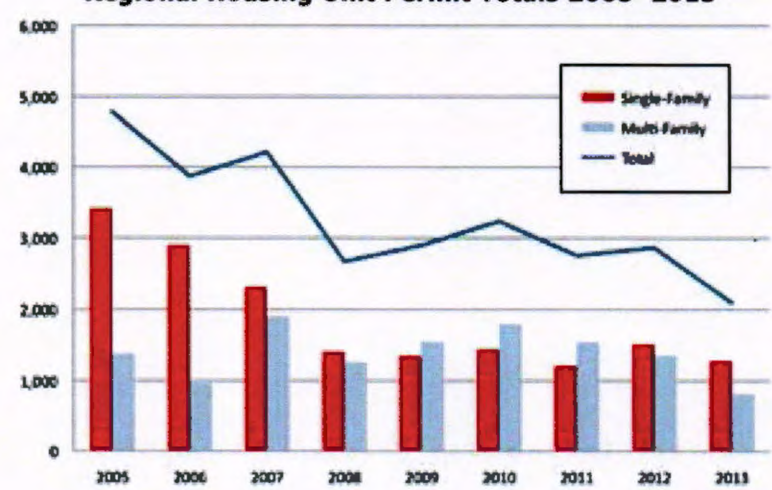


Annual Multi-Family Construction Index 2004-2013 (Year 2004=1.0)



Construction in Cammack Village.

Regional Housing Unit Permit Totals 2005-2013



Demographic Outlook 2014

Population growth in the state of Arkansas has dropped to its lowest level since the 1980-1990 decade. The Central Arkansas region is growing at more than twice the rate, but is also growing more slowly than at any time since the 1980s. Some of the weakness in housing markets can therefore be explained as much by demographic factors as economic ones.

The employment outlook has turned up during 2014 so far, but regional job growth has lagged the national average since about 2010. Unemployment is now 5.5 percent locally, lower than it has been since early 2009, but lowered labor force participation makes a direct comparison difficult. Discouraged by poor job prospects, many potential workers have apparently given up job-seeking. Local demographic and employment data suggest this dilemma is as prevalent locally as at the national level.

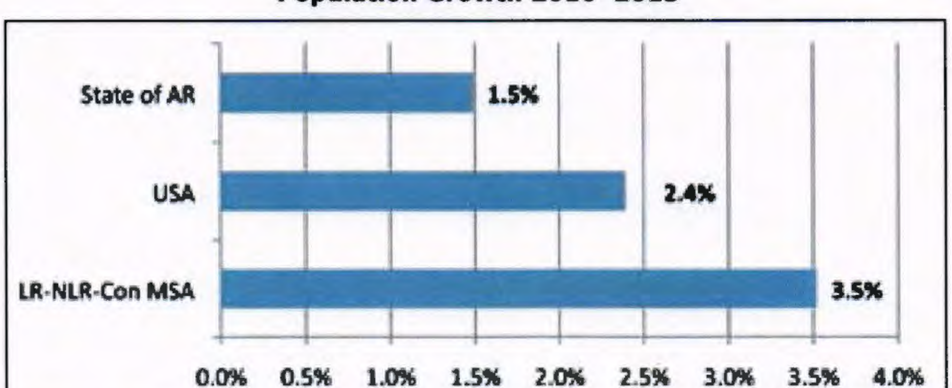
The Big Dam Bridge is one of several places in Central Arkansas where you can get away from traffic and ride a bike or take a stroll.

Suburbanization continues, but at a slower pace than in the past. As shown elsewhere in this newsletter, the region's three largest cities, particularly Little Rock and North Little Rock, have seen a lesser growth slowdown than most smaller suburban communities. Saline County is an important exception, seeing faster growth than the regional average. So-called "greenfield" development at the regional periphery has resumed after a fall-off during the Great Recession, but the pace remains slower than in decades past.

This edition's theme concerns pedestrian access, public health and the built environment. Despite pockets of pedestrian-friendly urbanity, and a sizeable and growing trail network, local residents depend heavily on their cars, and live mostly in low-density and not-very-walkable or bike-friendly neighborhoods. Overall density is low, and in many places pedestrian and transit access are minimal.[1]

Unlike cities in more heavily urban (and often coastal) states, Central Arkansas is not hemmed in by adjacent urban areas, nor by geographic barriers. Traffic and congestion levels remain comparatively low. Development trends have changed since the recent recession, but not as sharply as in other parts of the U.S. In short, Central Arkansas lags U.S. development trends by ten or twenty years.

Population Growth 2010–2013



Source: Census 2010 and Census Estimates forJuly 1, 2013.

[1] Census figures show that in 2010 the Little Rock UA (Urbanized Area) ranked 87th in density out of the 100 largest U.S. urbanized areas.

The advantage of following trends is that you can learn from what's happening elsewhere, making prediction easier. There are also hints in the data. From 2000 to 2010, the density of population within the region's incorporated areas rose slightly, after falling steeply from 1970 to 1990, and a bit more from 1990 to 2000. In the most recent (2010-2014) interval, density has continued gently increasing. Several factors may underlie this trend:

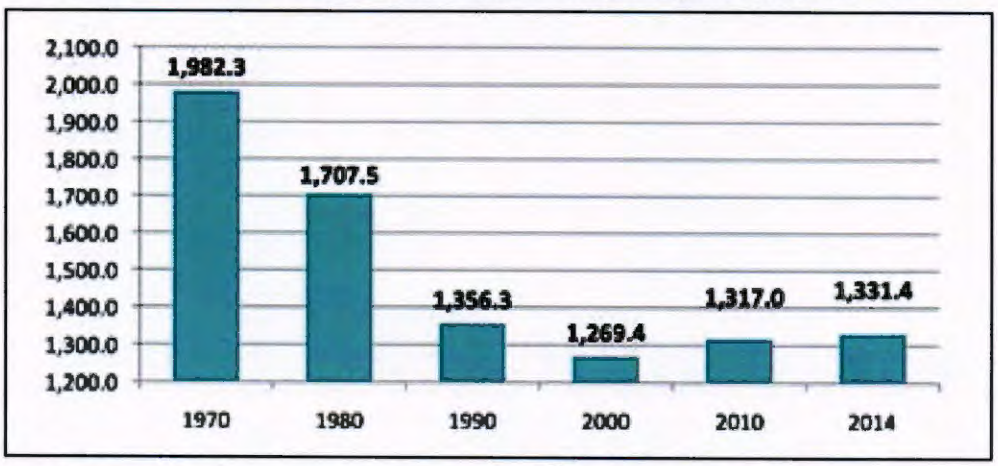
- The shift in housing construction toward more multi-family, much of it in redeveloping downtown and midtown sites.
- The lack of major transportation construction projects at the regional periphery. While some existing routes are being maintained or widened, there are no plans (and no funds) to extend the regional freeway network.[2] Most of the region's existing freeway-accessible sites have already developed, or will soon.
- Single-family housing markets are showing a bit more rebuilding activity in existing neighborhoods.

From dead mall to reinvented urbanism: the mixed-use Park Avenue center in midtown Little Rock.

This is particularly evident in communities that are walkable internally, or are linked into the regional trail network.

American cities (and Central Arkansas cities) have reinvented themselves and their urban forms in their past, and will continue doing so. Market forces will shape much of this change, but governments must be flexible in adapting their land use regulations and transportation investments, to help investors overcome regulatory barriers to redevelopment in existing urban and suburban nodes. The advent of "complete streets" policies in several regional cities[2] suggests a growing willingness to embrace the link between transportation choice and urban form. Changing public tastes will find expression in the landscape over time. **M**

Central Arkansas Incorporated Population per Square Mile 1970-2014



Data 1970-2010 from U.S. Bureau of the Census. For reasons of data comparability, the figures represent cities within the Central Arkansas Transporation Study Area as defined prior to the year 2011. Figures are for 2014 from Metroplan estimates of population and updated city boundaries.

Note: Figures are provisional because 2010 data represent GIS-based land area data for reasons of compatibility with 2014 land area data. Figures for 1970, 1980, 1990 and 2000 remain Census-based.

[2] Conway and North Little Rock. Passage is pending in Little Rock. There remains, of course, a difference between having policies in place and consistently enforcing them.

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