METRO TRENDS

Demographic Review and Outlook

METROPLAN

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About the cover:

The Commuting Game in Central Arkansas

The cover image conveys the daily challenge of commuting to work as a board game. Lifestyle choices are one of the starting conditions. The large house at bottom depicts the option many local residents pick, a single-family house, and often a spacious one. Most such homes are located many miles from jobs. Other options are available to consumers, often closer to jobs, in smaller homes or apartments. Schools are part of the picture, not just for parents getting the kiddies to school, but also for all the other commuters affected by school-related traffic. Transit is an alternative to driving, but carries only a small share of commuters in Central Arkansas. Bike lanes and sidewalks, conveyed at the top, represent another alternative. As the game board shows, however, the available infrastructure remains strictly limited at present.

Experienced commuters have learned how to play by the game's rules, which have stayed mostly the same for many years. With the advent of AVs (Automated Vehicles) and ride-sharing services, however, the time-honored rules of the game may be poised for some big changes.

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 five counties of 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 our 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*.

About CARTS

The Central Arkansas Regional Transportation Study, or CARTS, is the cooperative effort by the participating communities, transportation providers and many other interested parties to develop a long-range transportation plan for the metropolitan area.

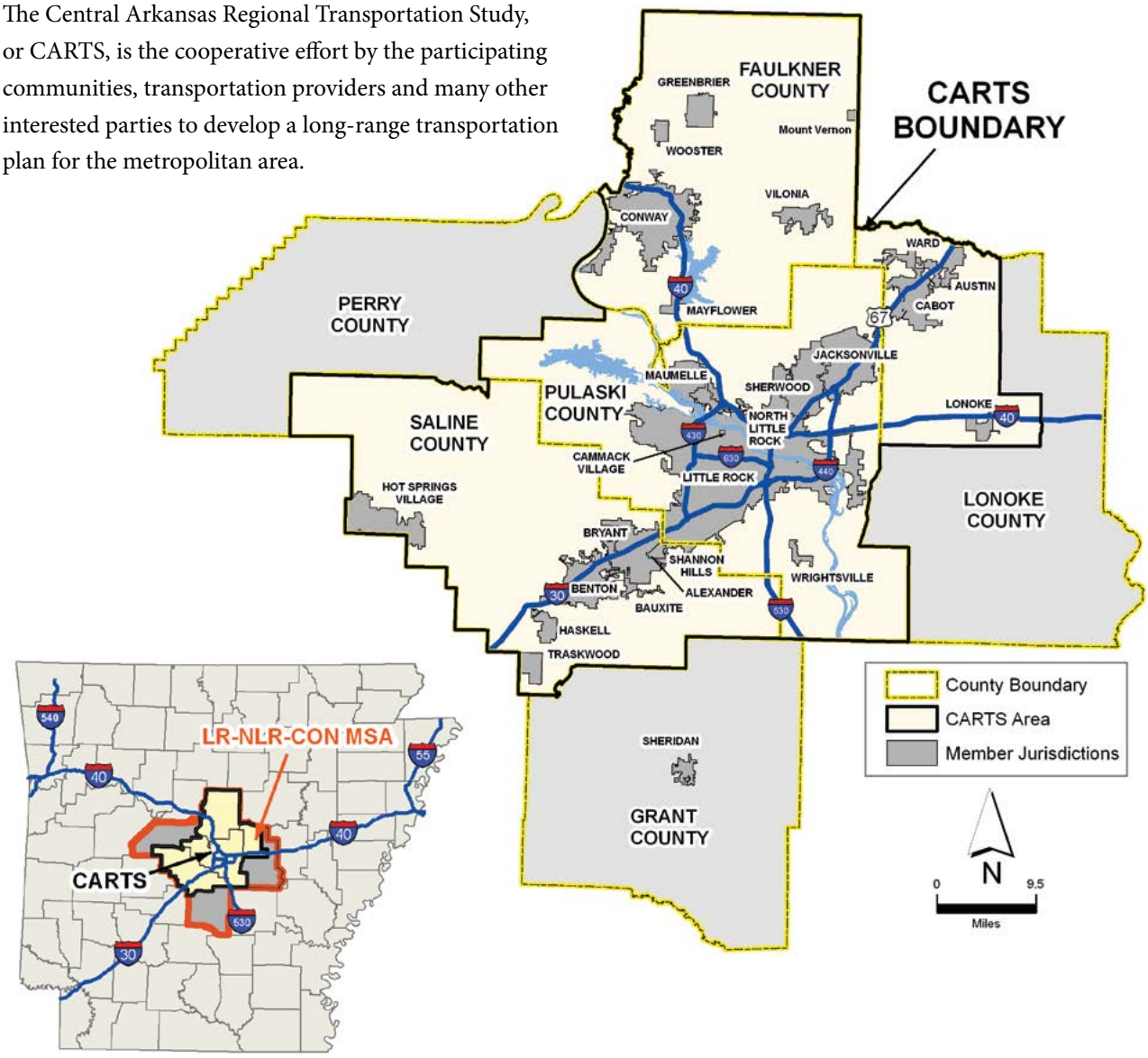


Table of Contents

Home to Job: The Worker Exchange

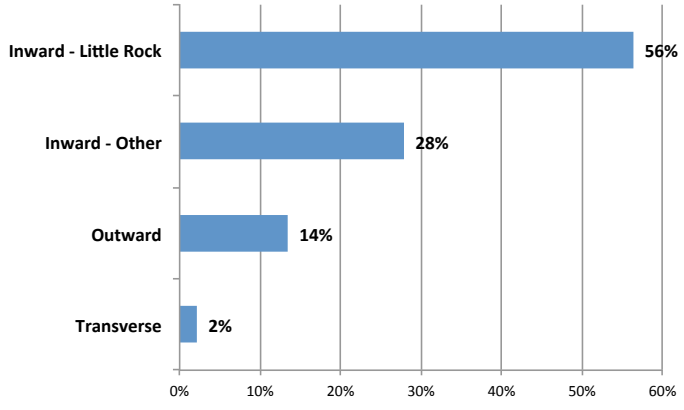
Metropolitan regions are fundamentally trading areas. Commuting—the exchange of workers between homes and jobs—is part of this trade. The Little Rock MSA generates about $38.6 billion each year in a diverse array of local jobs, ranging from hospital care to cyber security analysis, and classroom instruction to finishing work on aircraft interiors, and thousands of other tasks. Commuting is woven into the fabric of all these activities.

Geographers know that spatial interaction declines with distance. Similarly, the greater the distance between home and job, the fewer commutes are made, especially if the trip exceeds about 20 to 30 minutes. Proximity matters, and about 96 percent of those who work in the Central Arkansas region also live inside the region.[1]

Radial Commuting

In comparison with other metro areas, the Little Rock area has a centralized commuting pattern. A 2006 Brookings Institution study showed that 71 percent of jobs in Central Arkansas were within 10 miles of downtown, a much higher share than Dallas (33 percent), Chicago (31 percent), or even similarly-sized Baton Rouge (52 percent) or Knoxville (56 percent).[2] The commuting pattern has changed little in recent years. The chart below shows the region's commuting vectors. The most recent figures show that 56 percent of commuters were bound for Little Rock. Other inward flows accounted for another 28 percent, meaning 84 percent of regional commuters headed closer to the regional center to go to work. Fourteen percent commuted in an outward direction, while just two percent made transverse commutes.[3] In short, Central Arkansas commuters converge on the central area (and points along the way) going to work, and disperse in a radial pattern on their way home.

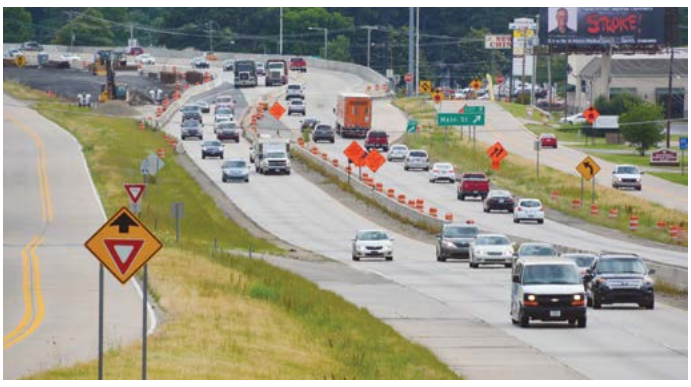
Central Arkansas Commuting Vectors 2006–2010



Source: CTPP 2006–2010 data for nine largest cities by population.

Place of Work

Jobs have been moving into the suburbs over time. The map on page 4 shows the nine largest cities in Central Arkansas by the number of workers employed there, based on the latest available data (2006–2010). As you can see, Little Rock had nearly 164,000 jobs by place of work. About half of Little Rock workers came from other cities, towns and rural areas. The vast majority of working persons who live in Little Rock also hold jobs there. The region has two other major employment centers: North Little Rock with 39,000 jobs (held mainly by commuters from outside the city), and Conway with 34,000 jobs (a slight majority held by Conway residents). The remainder of jobs (about 67,000) were spread between smaller suburban communities. The region's suburban cities have seen a lot of job growth in recent years, but remain secondary in the jobs picture.



Back out to the 'burbs: afternoon commuters traverse Jacksonville for Cabot, Austin, Ward and points beyond.

[1] The Census Bureau's definition of metropolitan areas (MSAs) is based on linkage between population concentration and commuting patterns.
[2] Kneebone, *Job Sprawl Revisited: The Changing Geography of Metropolitan Employment*, Brookings April 2009. While the study is eight years old, the commuting figures cited for Central Arkansas have barely changed.
[3] The analysis assumes that all commutes to Little Rock or North Little Rock from other cities are inward, and that any commutes from an outer city to the next-closest city to the central area are also inward. Outward flows are those from the two central cities or other cities to locations farther out. Transverse commutes are those between non-central cities past or through the central cities.

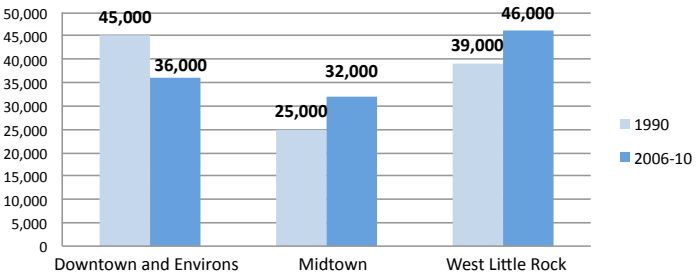
Jobs in western Little Rock are dispersed more widely than those in downtown or in midtown, with several office and hospital concentrations like this one just north of the intersection of Shackleford Rd. and I-430.

Employment tends to cluster in downtown areas, around hospitals and in groupings near major interchanges, where shopping centers and office parks are often found. Since about half the region's jobs are located in Little Rock, it's helpful to know where in the city they are located. About 22 percent of the city's jobs (around 36,000) are in and near downtown, including the environs of the State Capitol and Children's Hospital. This is the highest-density concentration of jobs in the region. The Midtown area, west of the capitol, north of 22nd Street, to University Avenue, holds another 32,000 jobs, concentrated especially at the UAMS and St. Vincent hospitals but also in Riverdale and the Heights. Little Rock west of University, generally north of Colonel Glenn had about 46,000 jobs, or 28 percent. Thus western Little Rock has the largest share of the city's jobs now but since it is a fairly big area, jobs in western Little Rock are more dispersed than in downtown and midtown areas.

Recent Past, and Questions About the Future

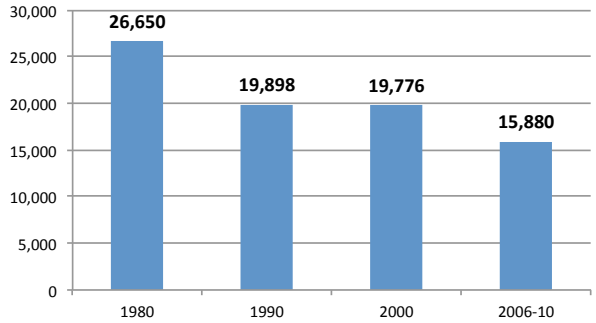
Commuting patterns have changed only gradually during the past several decades in Central Arkansas. The majority of working residents in outlying counties drove to jobs in Pulaski County thirty years ago, as they do today. Jobs in the regional core have declined from 1980 through 2010 in absolute numbers as well as in share, as shown in the chart at right. The urban comeback visible in Downtown Little Rock, as well as Argenta and Midtown Little Rock, is more a byproduct of housing construction, and growth in retail and entertainment,

Little Rock Jobs by Location 1990–2010



Source: CTPP 1990 and 2006-2010

Little Rock Central Business District Jobs 1980–2010



Note: Downtown defined by old Census Tract 1 (official CBD in 1982 Economic Census).

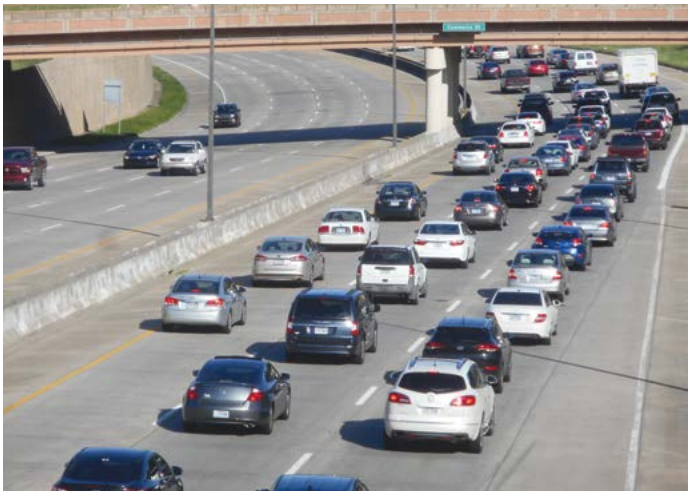
Sources:
1. 1980 data from Metroplan records (UTPP 1980 + local sources).
2. 1990, 2000 and 2006-08 data from Census Transportation Planning Package (CTPP).

Downtown and environs have lost jobs in recent decades, but still hold almost as many jobs as North Little Rock and more than Conway.

Midtown Little Rock saw 28 percent job growth from 1990 to 2010.

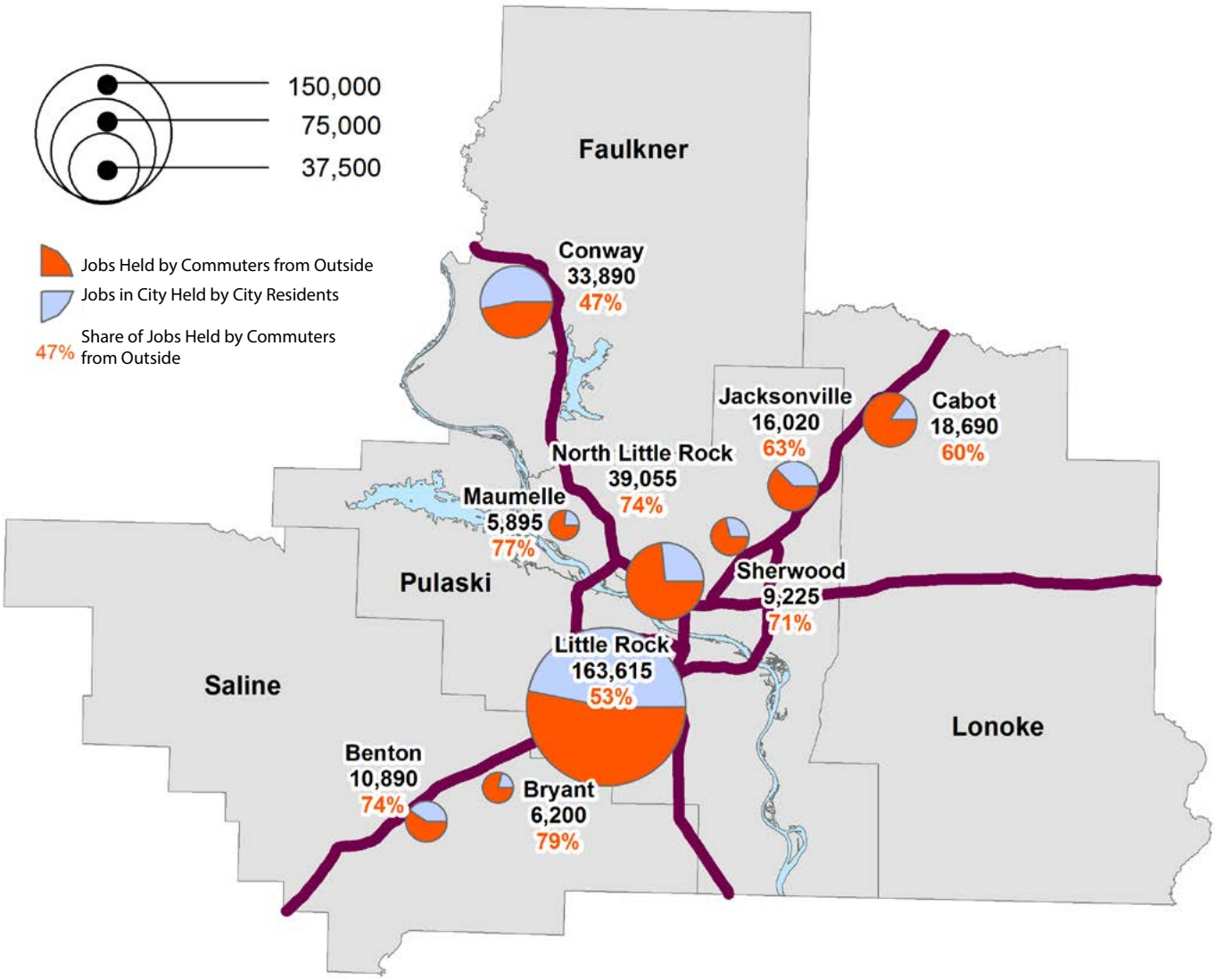
than in total jobs. The number and share of jobs in suburban areas like western Little Rock, Conway, and other outlying cities has grown. This fits with a national trend in which more and more jobs are located in the suburbs, often closer to workers' homes.

Although commuting has only changed incrementally in recent decades, it may soon be revolutionized with the advent of Automated Vehicles (AVs). This will raise questions about vehicle ownership, parking, in short *how* we commute, as well as possibly changing the limits on *where* we commute. This edition of the *Metrotrends Demographic Review and Outlook* will peer into changing commuting, demographic, and urban patterns, and make a few guesses about the future of living and working in Central Arkansas.



Incidents sometimes slow the drive home, as they did this afternoon on I-630 east bound.

Jobs by Place of Work 2006—2010



A Coming Commuting Revolution?

Automatic Vehicles (AVs) and the rise of car-sharing could literally change the landscape and alter commuting patterns beyond modern-day recognition. Working, parking and commuting may never be the same.

In the future, instead of owning vehicles, commuters may subscribe to fee-based ride services and avoid some pretty heavy fixed costs. Car companies are already exploring new business models that include ride services.[1] Space for parking —usually provided free, but with huge hidden expenses— might be reduced. Future streets, buildings and landscapes might de-emphasize parking, while providing vehicle turn-ins and sheltered bays to deposit and receive their human loads.

If less space is needed for parking, a lot of urban and suburban land today covered in asphalt could instead go for housing, offices, stores or even parks. Cities could host more activity on less area, less crowded with parked cars. This could improve livability through upgrades to pedestrian and biking facilities within a more cohesive urban fabric.[2] But exactly how urban form might change, either toward greater density or less density, or some combination of both, is hard to foresee.

The change will probably proceed in stages. Land developers may want to plan how to gradually shift from today's parking-intensive offices and shopping centers to tomorrow's easy drop-offs and less car-crowded landscapes. Yet the built environment is "sticky," dotted with structures left over from past land use and transportation patterns. Some will require modifications. Uber has launched a website, Uber Movement, which aims to assist urban planning efforts. They have developed forecasting data for some urban areas, but not yet the Little Rock MSA.[3]

What will happen to travel itself? With more travel done by AVs, the spacing needed on roads could diminish, potentially allowing more capacity on freeways and streets. The mixing of conventional vehicles with AVs could yield conflicts over parking rights and traffic laws. The slow but steady rise in working from home could reduce the need for travel, yet a lot of people who today can't drive may be able to use AVs in the future. Thus, total vehicles on the road could decrease or increase. Since roads are subsidized by governments as free infrastructure, an increase in total vehicle-miles seems more likely.[4] How quickly will people make the switch? Will wealthy people be the first users of AVs, or will they hang onto vehicle ownership, leaving AV use for those less well-to-do? These questions cannot be fully answered at present, but it's time to begin asking. **M**

The need for parking space may diminish in the future, opening land for housing, parks or other uses.

The future may demand more turn-in bays for passenger dropoff and pickup, perhaps resembling this one at St. Vincent Hospital.

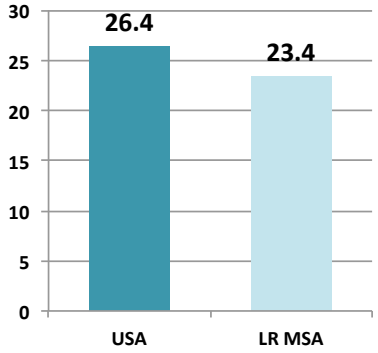
[1] "Here Come the Robot Cars," *Planning*, April 2017.
[2] "Parkageddon: How Not to Create Traffic Jams, Pollution and Urban Sprawl," *Economist,* April 8, 2017.
[3] As of the time of writing, May 2017. Available at https://movement.uber/cities.
[4] "Will Driverless Cars Become a Dystopian Nightmare?" *National Journal*, January 26, 2017.

Commuting by the Numbers

On a typical day, about half of the population of Central Arkansas—around 330,000 people—goes to work. A few work at home, but the vast majority make a trip. Charts and tables on this page and the next two show basic Central Arkansas commuting and travel statistics through text, rankings and charts. Central Arkansas is notable for the high share of commuters who depend on private vehicles, and a comparatively low share who use alternate modes—transit, walking, or biking.

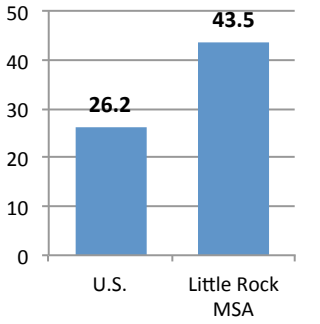
The average commute in Central Arkansas takes 23.4 minutes, somewhat less than the U.S. average of 26.4 minutes. Both U.S. and Central Arkansas commuting times have lengthened marginally in recent years. Back in 2000, for example, the average commute in Central Arkansas was 22.9 minutes, so it has increased by half a minute since then. The average U.S. commute was 25.5 minutes in 2000; since then it has risen by almost a full minute.

Average Commuting Time 2015 (Minutes)



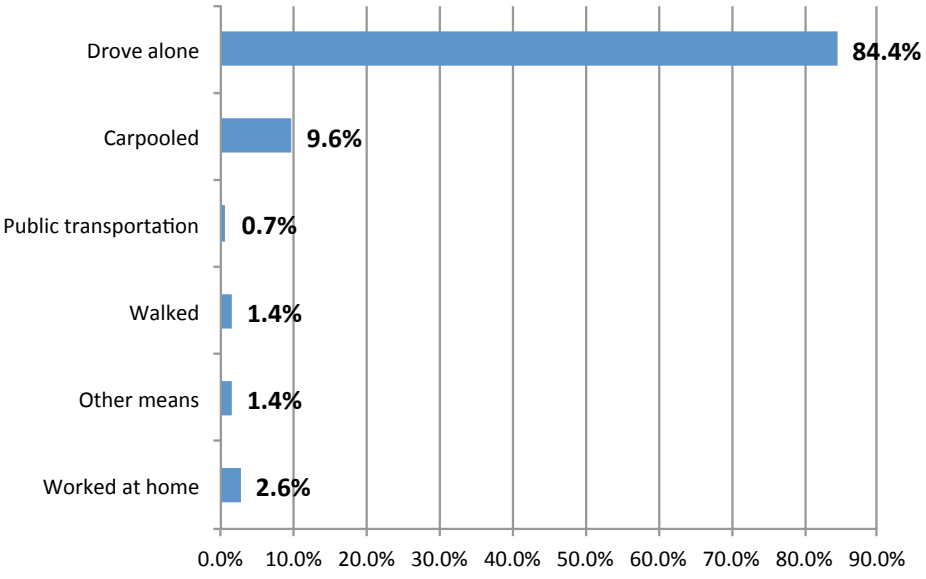
Source: ACS 2015

Daily VMT per Capita 2014



Source: *Highway Statistics 2014*, FHWA.

Central Arkansas Commuting by Mode 2015



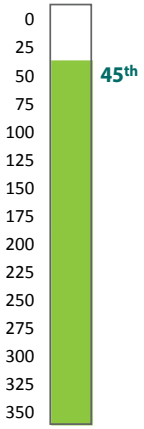
Source: ACS 2015

Work and How We Get There: Some Rankings

The statistics below compare the Little Rock MSA with other metropolitan areas in the U.S. for its commuting share. The total number of metro areas in 2015 with commuting statistics available was 367, out of 381 total metro areas in the country. All figures are from the 2015 American Community Survey. Thermometer charts convey the region's ranking among 367 metro areas.

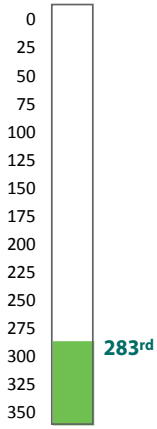
Total Drivers and Ride Sharers

If you count all commuting to work via private vehicles (including shared rides or carpools), about 94 percent of Little Rock MSA residents rode to work in a car or truck. That's just under nineteen out of every twenty commuters. In this category the Little Rock MSA ranks 45th highest in the country.



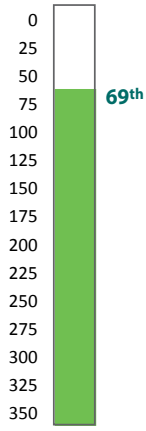
Walkers

About 1.4 percent of local workers walked to their jobs in 2015. This ranked the region tied with twelve other metro areas for 283rd out of 367. Top rank went to Ithaca, NY with 13.9 percent walkers.



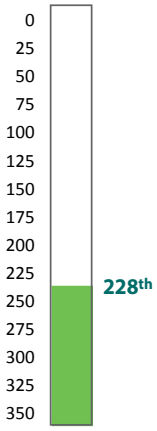
Drove Alone

About 84.4 percent of Central Arkansas residents drove alone to work in 2015. This ranks the region 69th in the country, tied with four other metro areas (including Indianapolis and Memphis). Top rank for driving alone went to Huntsville, Alabama with 89 percent. Lowest was New York City with 49.9 percent.



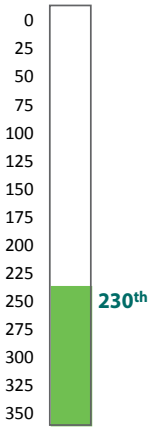
Transit Riders

About 0.7 percent of workers in Central Arkansas took transit to work in 2015. This ranks the region in 228th place, tied with twelve other metro areas. Top ranking in the country went to New York City, with 31.5 percent.



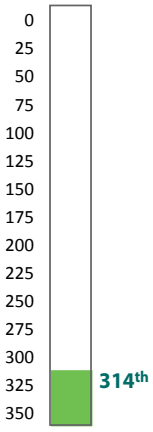
Biyclists

Although Central Arkansas is known for its trails, the statistics suggest they aren't used much for commuting. About 0.2 percent of commuters—one in five hundred—rode a bike to work. This ranks the region 230th in the nation, tied with 45 other metro areas (including Atlanta) with a similar share. Top rank goes to Corvallis, Oregon with 9.4 percent. Boulder, Colorado ranks third with 4.4 percent. Both are college towns.



Worked at Home

The share of employees working from home has grown in recent decades, but remains a minority of jobs. When ranked against other metro areas, Central Arkansas has only 2.6 percent working from home (compared with a 4.6 percent U.S. average). Central Arkansas stacks up at 314th of 367 metro areas measured. Highest ranking was Bend, Oregon with 12.9 percent. Among southern metros, Raleigh ranked highest (6th in the nation) with 8.6 percent.



While the region's share of bicycle commuters is comparatively low, programs are underway to give bicycles a boost. Conway is actively developing a bike/ped trail network, and launched a bikeshare service in May 2017. Little Rock will introduce a similar service in 2018.

Local transit serves only a small share of commuters, but provides a vital service for some. With an upgraded fleet of CNG buses, onboard wifi and an app for tracking your bus, Rock Region Metro aims to attract more riders.

Local bike/ped enthusiasts are eagerly awaiting the opening of the dedicated bike/ped lane on the new Broadway Bridge, which also includes approach ramps to the Arkansas River Trail on both sides.

Population Estimates 2017

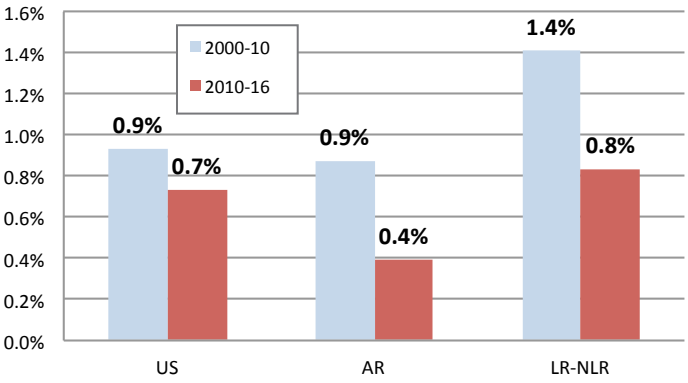
This year's population estimates reveal a minor milestone: Benton, the fourth-largest city in Central Arkansas, has crossed the 35,000 population mark. Little Rock, the region's largest city, remains poised just below 200,000. This year's estimate for Little Rock shows a slightly lower total than previous estimates Metroplan published in 2015 and 2016. This represents an adjustment to underlying assumptions. The city's population is not declining, but growth has slowed down after a brief speed-up in the first years of the present decade.

North Little Rock remains the region's second-largest city, with just over 65,000 people. Conway's population is lower by about 700. For the past seven years, Conway has been gaining about two additional residents for each new resident in North Little Rock. If this trend continues, it's an even bet which city will rank as the region's second-largest for the official census count in 2020.

The overall trend is one of slowing population growth, which coincides with broader national trends in which both natural population increase and migration are slowing. Saline County, with fast-growing Benton and Bryant, is the region's fastest-growing county, yet even here growth has slowed from the previous decade. Faulkner County now ranks in second place for population change, while Lonoke County is growing at less than half its annual rate during the 2000–2010 decade. Central Pulaski County continues growing slowly, with little change from the past decade.

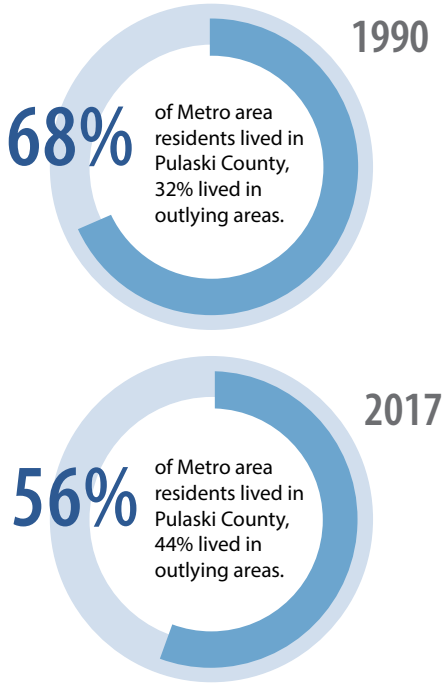
Some of the regional slowdown reflects national trends. The chart below left compares annualized growth 2010–2016 with annualized growth in the 2000–2010 decade (by using annual rates, we can compare periods of differing length directly). Overall U.S. population growth has slowed, from 0.9 percent annually 2000–2010 to 0.7 percent during the more recent interval. The state of Arkansas has seen growth drop by more than half, from 0.9 percent annually to 0.4 percent. The Little Rock MSA has slowed from its rapid 1.4 percent annual clip in the previous decade to 0.8 percent, still above the U.S. average.

Annualized Population Growth Rate
2000–2010 vs. 2010–2016



Source: Metroplan analysis based on decennial census and latest census estimates.

Residents Living in Pulaski County vs Outlying Areas 1990 and 2017



Population Change

Little Rock-North Little Rock-Conway MSA Population Change 2010–2017

Faulkner County	2010	2017	Change
Conway	58,908	64,320	9.2%
Greenbrier	4,706	5,261	11.8%
Mayflower	2,234	2,487	11.3%
Vilonia	3,815	4,151	8.8%
Wooster	860	1,039	20.8%
Small communities	2,245	2,594	15.5%
Unincorporated	40,469	43,089	6.5%
County Total	113,237	122,941	8.6%

Grant County	2010	2017	Change
Sheridan	4,603	4,878	6.0%
County Total	17,853	18,101	1.4%

Lonoke County	2010	2017	Change
Cabot	23,776	25,433	7.0%
Austin	2,038	2,825	38.6%
Ward	4,067	5,126	26.0%
Lonoke	4,245	4,295	1.2%
England	2,825	2,744	-2.9%
Carlisle	2,214	2,172	-1.9%
Small communities	751	748	-0.4%
Unincorporated	28,440	29,344	3.2%
County Total	68,356	72,687	6.3%

Perry County	2010	2017	Change
Perryville	1,460	1,422	-2.6%
County Total	10,445	10,108	-3.2%

Pulaski County	2010	2017	Change
Little Rock	193,524	198,842	2.7%
North Little Rock	62,304	65,004	4.3%
Jacksonville	28,364	28,712	1.2%
Sherwood	29,523	31,257	5.9%
Maumelle	17,163	18,965	10.5%
Wrightsville	2,114	2,146	1.5%
Cammack Village	768	748	-2.6%
Alexander*	236	235	-0.4%
Unincorporated (N)	25,410	25,575	0.6%
Total North of River	162,764	169,513	4.1%
Unincorporated (S)	23,342	23,493	0.6%
Total South of River	219,984	225,464	2.5%
Total Unincorporated	48,752	49,068	0.6%
County Total	382,748	394,977	3.2%

Saline County	2010	2017	Change
Benton	30,681	35,440	15.5%
Bryant	16,688	20,749	24.3%
Shannon Hills	3,143	3,720	18.4%
Haskell	3,990	4,620	15.8%
Alexander*	2,665	2,603	-2.3%
Traskwood	518	550	6.2%
Bauxite	487	497	2.1%
Unincorporated	48,946	51,282	4.8%
County Total	107,118	119,461	11.5%

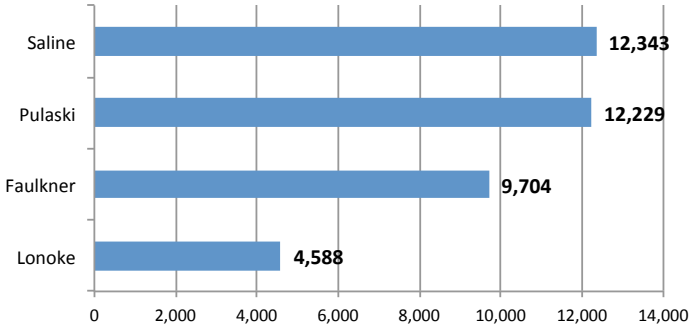
Hot Springs Village CDP (Unincorporated area)	2010	2017	Change
In Saline County	6,046	6,670	10.3%
In Garland County	6,761	6,788	0.4%
HSV Total	12,807	13,458	5.1%

City of Alexander Total (County splits shown above)	2010	2017	Change
Alexander	2,901	2,838	-2.2%

4-County Region	671,459	710,066	5.7%
6-County MSA**	699,757	738,275	5.5%

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

Estimated Change in Total Population 2010–2017



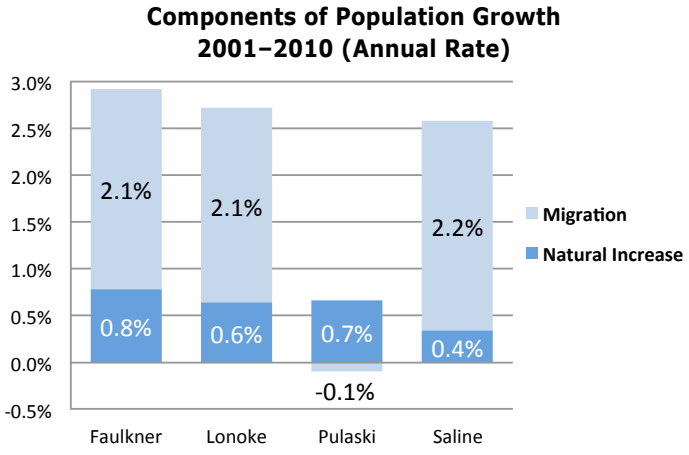
Demographic Analysis

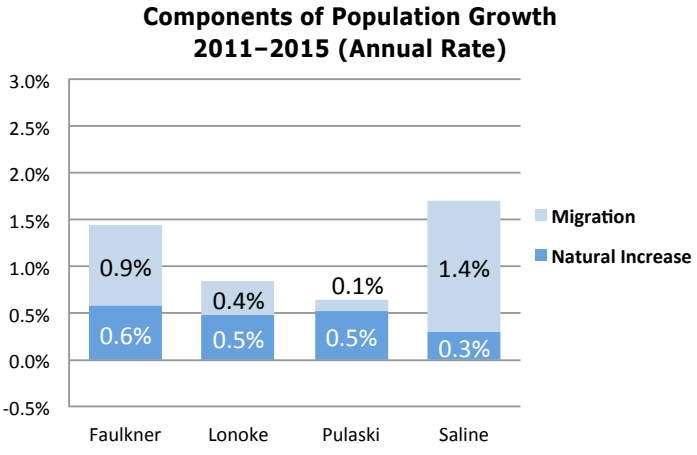
To better understand the local demographic slowdown, it helps to look at the three underlying causes of all population change: births, deaths, and migration. To simplify, the effect of births and deaths can be summarized in a single category: natural increase. The charts below compare sources of population growth (natural increase versus migration) for the region's four main counties over the two most recent five-year intervals. While all of the counties are seeing slower growth, the drop-off is most pronounced in Faulkner and Lonoke Counties. Net migration has fallen off by more than half in Faulkner County, from 2.1 percent annualized to a 0.9 percent rate. It dropped by even more in Lonoke County, from 2.1 percent to 0.4 percent. Saline County in-migration has also slowed, but not by as much. Pulaski County's net migration was negligible in both periods, although it may have ticked up marginally.[1]

Four generations. Photo courtesy of Bethea Dowling.

Natural increase, a smaller component of growth than migration in the three outlying counties, has declined in all four. The slowdown can be mainly attributed to a declining birth rate. Lower fertility was associated with economic effects of the Great Recession, which hit young adults particularly hard. Some of the change may also reflect new cultural trends as the Millennial generation, now the prime child-bearing group, seems to be putting off marriage and child-bearing. The other component of slower natural increase is that mortality, while still declining overall, has declined by less in the past five years — and has risen for some groups.

The region is now seeing its slowest rate of overall population growth since the 1980–1990 decade. This is important, because a lower population base, and a lower rate of growth, may impact the future. It is for these reasons that Metroplan will be making adjustments to its population projections for the upcoming regional plan. M

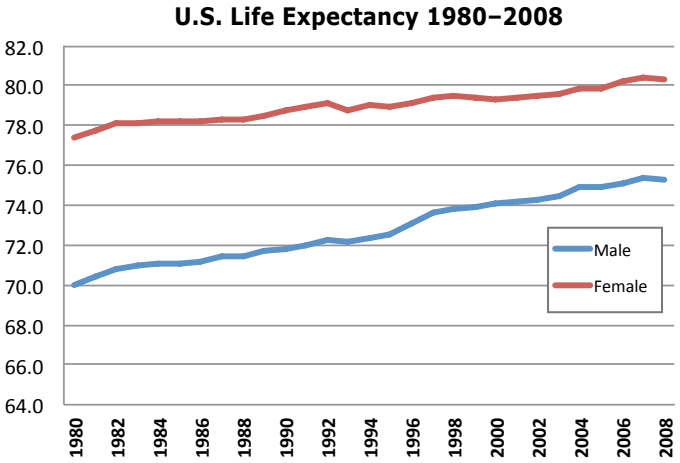




[1]The change from -0.1 percent to +0.1 percent is within the statistical margin of error, since population change from 2011-2015 is based on an estimate, not hard census data.

Mortal Questions

Mortality is worth studying because the better we understand how and why people die the better we can protect the health of living people. As a general rule, mortality rates have fallen throughout modern history. Average life expectancy has improved hugely in the past century. In 1920 average U.S. life expectancy stood at 54.1 years. By 2012 it had reached 79.1 years.

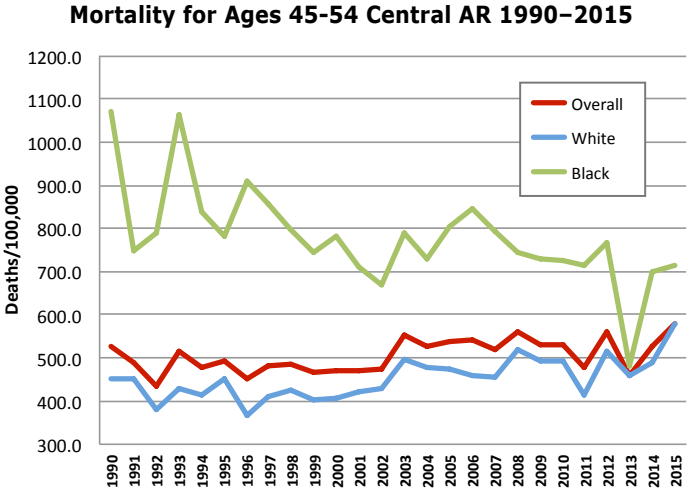


Source: OECD.

The latest demographic studies show, however, that for some U.S. groups, life expectancy has shifted into reverse in recent years. Instead of steadily declining, mortality rates have risen, even after statistical adjustment for aging of the population. According to recent studies, the trend is most pronounced in the 45-54 age category of the white population. Closer analysis suggests most of the rise in mortality has occurred among the less-educated, more economically-distressed segment of whites. Rising deaths seem to result from "diseases of despair" such as drug overdoses, obesity, alcoholism and suicides.[1]

The data on mortality for Central Arkansas matches the overall national trend, as you can see in the chart below. The chart depicts the critical 45-54 age group, and shows overall mortality (in red) stopped declining and veered upward since the early 2000s.[2] Note the difference in races. Black mortality (in green) continued declining in the local area overall, but remains higher than white mortality in this age group. While lower, white mortality (in blue) moved in an opposite direction after 2000 in the local area. While it remained lower than black mortality, by 2015 the rates were close.

There isn't enough data to know whether the local rise in white mortality can be attributed mainly to persons with lower education levels and poor economic prospects, but that's a good bet. The continuing decline in black mortality remains a positive trend, but the rise in white mortality has been great enough to cancel out overall gains. M



Data source: Arkansas Department of Health.

Abuse of opioid drugs is adding to the mortality toll inflicted by risky health habits. Photos: istock.com.

[1] "Deaths of Despair," *Economist* March 25, 2017.
[2] Arkansas Department of Health. Data from 2008 onward are provisional. Figures represent the four-county Metroplan planning area: Faulkner, Lonoke, Pulaski and Saline Counties.

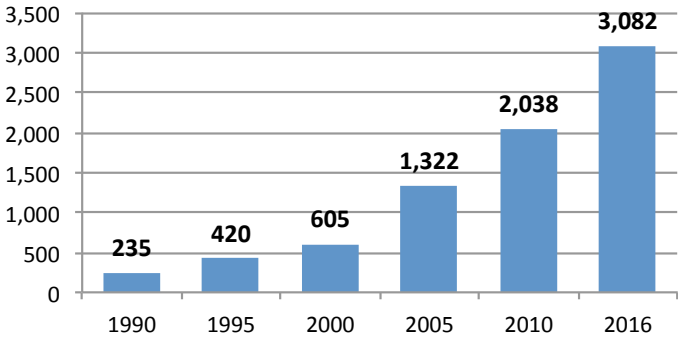
Austin Special Census

Austin, Arkansas has been the Central Arkansas region's fastest-growing city for several years. While cities generally encourage growth, it adds to costs too. Each city gets a share of state turn-back money based on its population size, but when population is growing really fast, the latest census figures can become outdated by mid-decade. Fortunately, state law allows cities to conduct a Special Census so they can update their population totals. Since cities must pay for their own Special Census, it can be hard to know if one is worth the cost. During 2015, the City of Austin conferred with Metroplan and the Census Bureau to see if it could benefit from a Special Census. After checking the figures, Metroplan staff advised the city that the revenue benefits of a Special Census would be worth the cost.

The Special Census was conducted in December, 2016. Austin's population came out at 3,082, higher than Metroplan's estimate. This is good news. Having additional people means extra money every year until Census 2020 counts become available, probably in March of 2021.

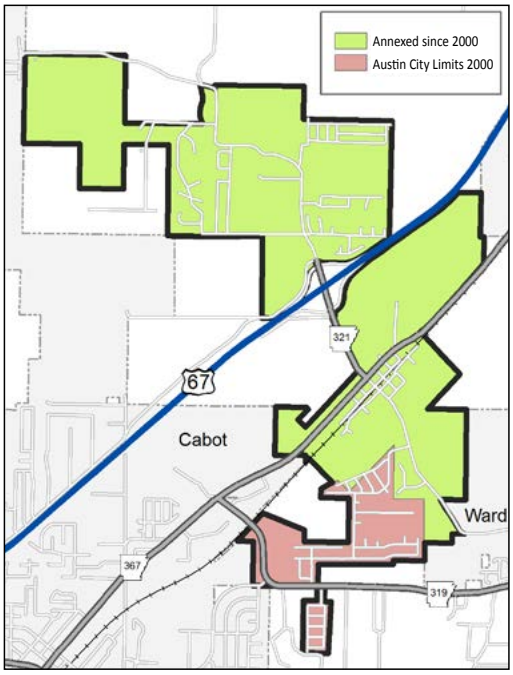
Mayor Chamberlain cuts the ribbon for Austin's new city hall in May 2017.

Austin, AR Population 1990–2016



Source: U.S. Bureau of the Census, with Metroplan estimates.

Austin, AR Boundaries 2000–2017



Most of Austin's employed residents work in Little Rock, Jacksonville and Cabot, but return to small town life for evenings and weekends.

National Comparisons for Congestion and Commuting

If you fret while delayed in traffic on your way to work, you might be surprised that congestion in the Little Rock region doesn't stack up badly. Even compared with southern urban regions of roughly similar size, like Baton Rouge, Jackson and Columbia, Little Rock does well. Local "commuting stress," as defined by the trend-setting Texas Transportation Institute, scores a modest 1.15, ranking 99th among urban areas in the country.

We drive a lot of miles though. According to federal statistics, the Little Rock Urbanized Area ranks sixth in the entire country for vehicle-miles traveled (VMT) per person, at 43.5 daily miles. We use our freeways heavily, and they account for 51.1 percent of vehicle-miles traveled in our region. As the table shows (below right), the Little Rock Urbanized Area ranks eighth among the 100 largest urbanized areas for share of travel (VMT) by freeway. This ranks us above Dallas, Houston, and others among the selected southern urban regions shown. Some of the Little Rock area's above-average freeway dependence might be traced to the way the region is bisected by the Arkansas River, with freeway bridges serving three out of five river crossings. If you commute in Central Arkansas, chances are good that at least part of the trip is done by freeway.

Commuter Stress Index for Selected Southern Urban Areas

Urban Area	Value	U.S. Rank
Austin TX	1.59	4
New Orleans LA	1.49	11
Houston TX	1.47	13
Okla. City OK	1.43	21
Memphis TN	1.42	23
Tulsa OK	1.40	34
Columbia SC	1.38	49
Dallas TX	1.38	49
Jackson MS	1.36	55
Baton Rouge LA	1.24	85
Little Rock AR	**1.15**	**99**

Source: Texas Transportation Institute (TTI)

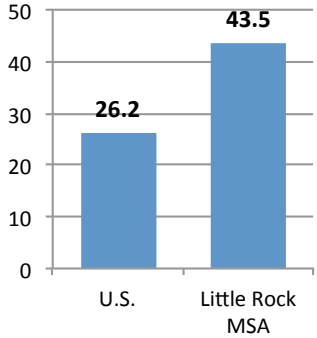
Freeway Share of Total Vehicle Miles Traveled

Urban Area	Frwy Shr	U.S. Rank
Little Rock, AR	**51.1**	**8**
Dallas, TX	49.1	11
Houston, TX	46.3	19
Columbia, SC	42.8	32
Austin, TX	41.0	38
Phoenix, AZ	37.1	57
Ok City, OK	36.7	60
New Orleans, LA	36.4	62
Tulsa, OK	35.3	66
Baton Rouge, LA	33.0	73
Memphis, TN	32.2	75

Source: FHWA, Highway Statistics, 2014.

Freeways account for three out of five river crossings, including the I-30 bridge shown here.

Daily VMT per Capita 2014



Source: FHWA Highway Statistics 2014, Table HM-72.

Slow Housing Construction in 2017

Last year saw a slowdown in housing growth. In all, the four-county Central Arkansas region granted permits to 1,729 new housing units. A sharp decline in multi-family construction during 2016 was the major reason the region registered its lowest figure for new housing starts since the year 1990.

Single-family housing was up a bit in 2016, at least compared with recent past years. Little Rock led with 331 units, followed by Conway and Sherwood. With 208 units in 2016, Conway saw its best single-family performance since 2010 (223 units). Sherwood, with 207 units in 2016, gave its best showing since 2007 (219 units). Bryant also saw an increase with 122 units in 2016, its largest since 2012. Maumelle was up modestly to 51, while all other cities showed decline over the previous year. The quarterly trend index of single-family housing construction, which includes seasonally-adjusted figures through the first quarter of 2017, shows a continuing slow pace in single-family at both national and local levels.

The multi-family sector in Central Arkansas registered a big decline. Community opposition halted a new complex along Bowman Road in Little Rock. This slowed the pace of apartment construction temporarily. The largest project permitted in 2016 was the 171-unit Landmark Apartments just off Cooper Orbit Road near the western fringe of development in Little Rock. There were also a few smaller projects, including the 48-unit Scott St. project in downtown Little Rock, 82 units in Argenta Flats in downtown North Little Rock, and one small apartment project and several duplexes in northeastern Conway. It is likely the multi-family slowdown was temporary. There are several projects in

New Housing Unit Permits by City 2013–2016

Single-Family

	2013	2014	2015	2016
Benton	201	203	160	159
Bryant	110	73	79	122
Cabot	97	50	96	90
Conway	148	119	145	208
Hot Springs Vill.	72	40	60	39
Jacksonville	31	32	43	35
Little Rock	353	360	318	331
Maumelle	76	98	35	53
N. Little Rock	103	70	93	76
Sherwood	158	151	187	223
Total	1,349	1,196	1,216	**1,336**

Multi-Family

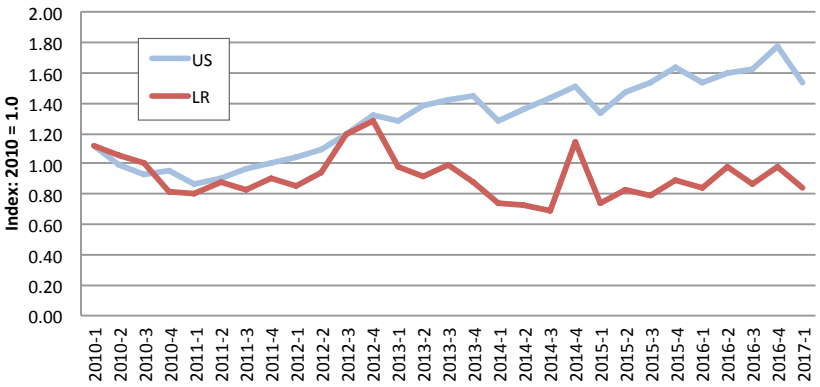
	2013	2014	2015	2016
Benton	8	0	632	22
Bryant	0	0	0	16
Cabot	0	11	29	0
Conway	152	67	10	61
Hot Springs Vill.	0	0	0	0
Jacksonville	2	14	0	4
Little Rock	265	556	457	247
Maumelle	0	0	108	0
N. Little Rock	396	4	0	82
Sherwood	0	0	0	0
Total	**823**	**652**	**1,236**	**432**

Units by Type and Overall Total

	2013	2014	2015	2016
Single-Family	1,349	1,196	1,216	1,336
Multi-Family	823	652	1,236	432

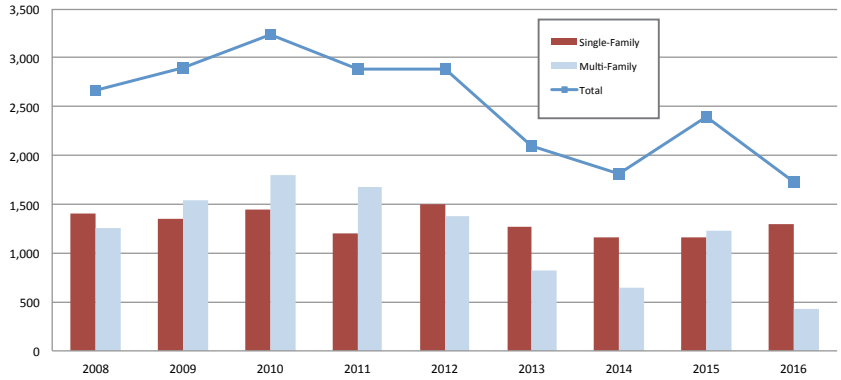
Note: regional totals above exclude Hot Springs Village, which overlaps into Garland County.

Quarterly Single-Family Construction Trend 2010-2017 Q1(p)



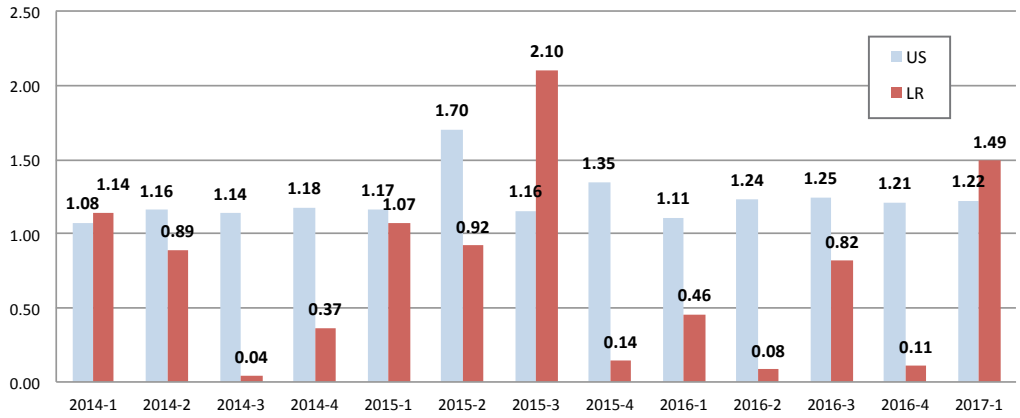
varying stages of development. The local multi-family index ticked upward in the first quarter of 2017 with an addition of 203 units to the existing Bowman Pointe complex in Little Rock, along with smaller projects in Benton, Conway and North Little Rock.

Regional Housing Unit Permit Totals 2008–2016



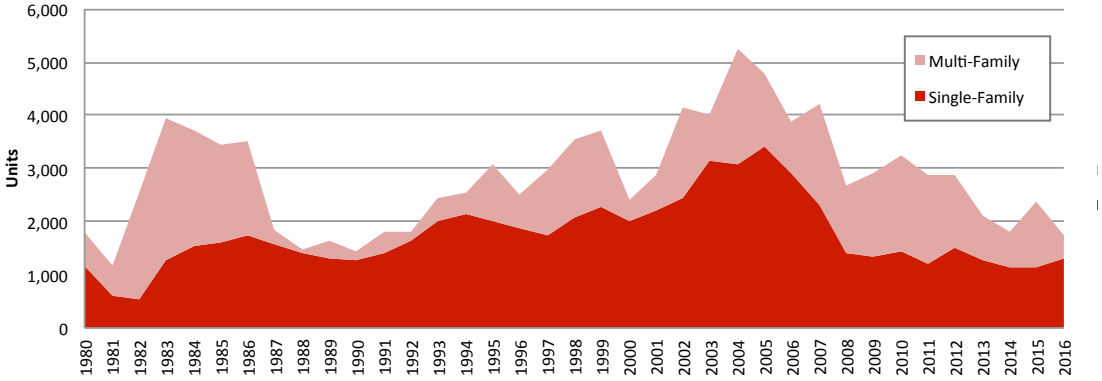
The area chart (at bottom of page) gives a 34-year retrospective look at housing construction trends in the nine largest cities in the region.[1] Single-family is probably near the bottom of a cycle, since it has rarely dropped below its 1,000 units yearly since the days of historically high interest rates in the early 1980s. Multi-family has been more volatile, going through a boom during the mid-1980s attributable to tax credits and a phase of excessive borrowing. Multi-family stayed in the doldrums through the middle 1990s as the market absorbed the excess of new units. Multi-family then saw three surges, in the late 1990s, early 2000s, and especially during the Great Recession years 2008-2011 or so. Cycles drive the industry, and it is likely that slow construction during 2016 will give way to higher figures soon.

Multi-family Construction Index 2014–2017 1Q (seasonally adjusted)



Index based on quarterly average for years 2011–2015, data from U.S. Census Bureau and Metroplan.

LR MSA Housing Unit Permits by Type 1980–2016



[1] Prior to the year 1980 Metroplan did not record permits for Conway and Cabot, so that year marks the beginning of the four-county data set.

Demographic Outlook 2017

The Shoppes at Benton, scheduled to open the summer of 2017, will enter a regional retail market with flat-to-declining sales

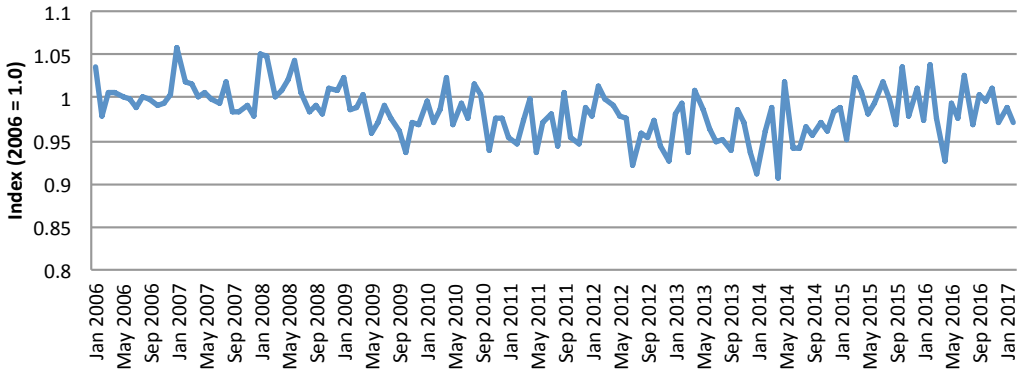
Population growth in outlying counties of the Little Rock-North Little Rock-Conway MSA slowed with the Great Recession. Today, with a stronger economy and lower fuel prices, preliminary evidence suggests suburban population growth may be picking up, although it is unlikely to match the pace of the 1990s and early 2000s. Saline County has reached roughly 120,000 population, and is becoming more urban in character. While growth in Cabot has slowed, nearby Austin and Ward are among the region's fastest-growing communities at present. At the regional level, low unemployment and recent income gains may signal economic strength that might boost in-migration to the region in the near future, but population statistics show only slow growth at present.

Slower natural population increase can be attributed to reductions in the birth rate, as well as a rise in mortality for some groups and a slower decline in mortality for others. Improving economic circumstances might help remedy some of the "diseases of despair" that have boosted mortality in white later-middle-aged groups. The problem has been developing for at least the past fifteen years though, and immediate remedies are unlikely.

The traditional "brick and mortar" retailing sector is entering a crisis at the national level. Internet sales are competing head-to-head against a growing share of the retail market. There has been a lot of retail construction in Central Arkansas in the past 2–3 years, and since total retail sales in the region are not growing while Internet sales continue climbing, a retail "bust" could be imminent. Metroplan's regional retail sales index has veered down in recent months.[1]

While demand for new single-family homes remains soft at present, multi-family markets are strong. The one exception is multi-family properties built prior to about 1980, for which vacancy is widespread. Despite strong demand for new multi-family, restrictive land use controls have thwarted multi-family development in several local cases. As retailing demand softens while demand for urban living increases, some older retail properties might be ripe for redevelopment that mixes housing into the picture, with a revitalized but smaller retail presence. M

Retail Sales Index
Four-County Central Arkansas Region



Seasonally adjusted. Inflation adjusted.
Source: Arkansas Department of Finance and Administration Index, seasonal adjustment and inflation adjustment by Metroplan.

[1]Index figures are adjusted for inflation and seasonality.

Statistical Supplement

Population Estimates

The key driver of Metroplan's population estimates is housing units, based on the most recent decennial census (currently Census 2010), which counts total housing units and occupied units. Every year we add up city building permit records for new housing units, as well as housing demolition records.[1] By accounting the change in housing units, we get a good estimate of housing units for each city.

But there's a catch: we can't be sure of the average occupancy for housing units. We also can't know how many people are in each unit (statistically we call this average household size). During times of change, particularly recessions, these figures can vary. For example, occupancy dropped across the region during the Great Recession, from roughly 2008 through 2013. By comparison, household size increased during these years, as more people doubled up to deal with income loss. More recent ACS data suggest occupancy has begun climbing again, while average household size is returning to its historic trend of slow decline.

The charts below and at right depict occupancy and household size, conveying complete-count (census) figures with blue bars, and estimates (from the sample-based ACS) with red lines.[2] Each individual city and county has its own occupancy and household size trends, depending on local economic and social conditions. Metroplan uses these statistics to help with estimating population. When the latest decennial census comes along, we usually find our estimates came pretty close. But there are surprises, too.

Commuting Flows

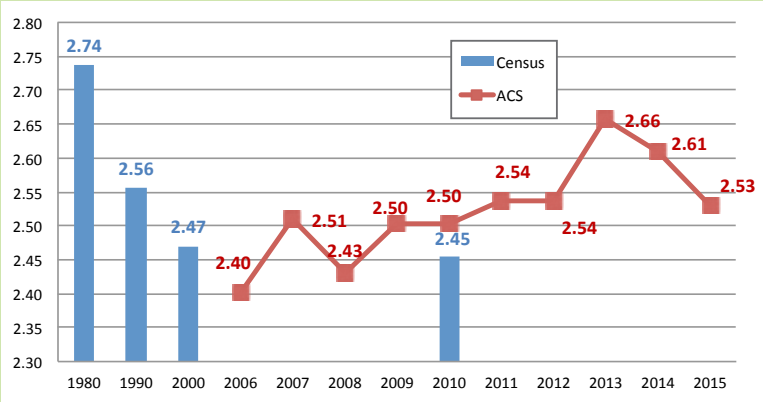
The table below gives the largest city-to-city commuting flows, according to data in the Census Transportation Planning Package (CTPP) for the years 2006-2010. Of the twelve city-to-city flows shown, eight have Little Rock as the destination.

Top Twelve Commuting Flows 2006–2010

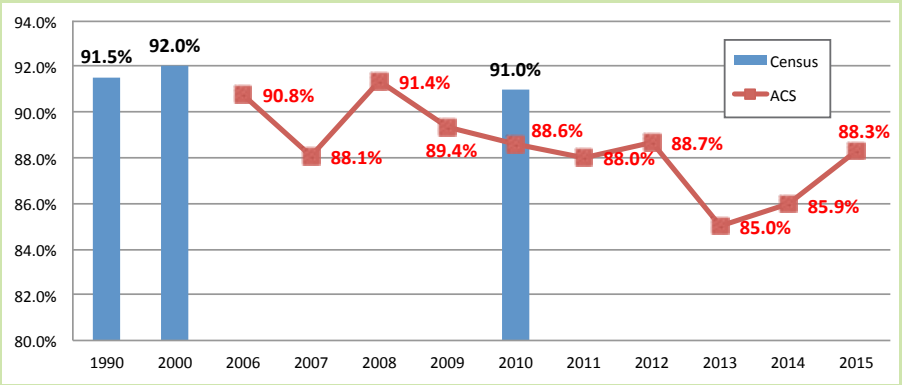
Rank	Flow (residence to work)	Workers
1	North Little Rock to Little Rock	12,320
2	Little Rock to North Little Rock	6,340
3	Sherwood to Little Rock	5,670
4	Benton to Little Rock	5,305
5	Maumelle to Little Rock	4,540
6	Conway to Little Rock	4,150
7	Bryant to Little Rock	4,100
8	Sherwood to North Little Rock	3,565
9	Cabot to Little Rock	3,105
10	Jacksonville to Little Rock	3,030
11	Jacksonville to North Little Rock	2,070
12	Cabot to Jacksonville	1,850

Source: CTTP 2006–2010.

LR-NLR MSA Household Size Analysis 1980-2015



LR-NLR MSA Occupancy Trend 1980–2015



[1] Generally demolitions are only common in the region's larger and older communities, today Little Rock, North Little Rock, Conway and Benton.
[2] Unlike complete-count census figures, ACS data are subject to margins of error.

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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.

Prepared by: Jonathan Lupton, research, writing and editing
Lynn Bell, graphics, layout, and illustration

Photographs by Lynn Bell, Jonathan Lupton and Daniel Holland except where noted.

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