# Demographic Review and Outlook

**Trail-Oriented** Development

- The Logic of Trail-Oriented Development
- Population Trends in Late Decade
- **Population Change**
- Rockwater Village
- When Trail-Oriented Development Slaps You in the Face
- Housing Construction Stable in 2018
- Demographic Outlook 2019
- **Statistical Supplement**

ROPLAN

August 2019

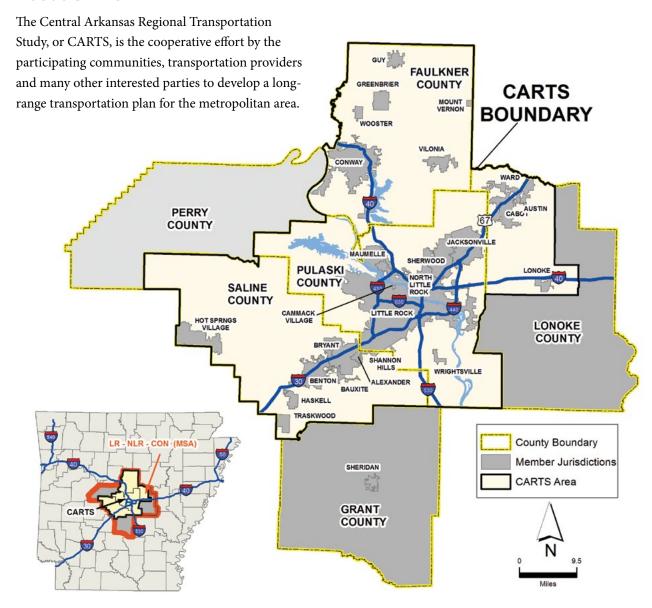
SMART PLANNING MAKES SMART PLACES.

# **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 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/summer edition is the *Demographic Review and Outlook*; the fall/winter edition is the *Economic Review and Outlook*.

# **About CARTS**



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# The Logic of Trail-Oriented Development

Small, strategic public investments can sometimes yield profound results. Building trails and sidewalks is a form of public expenditure that enhances the local sense of place at relatively low cost. Far more expensive highway investments rarely do. For example, when ArDOT proposed the I-30 widening in mid-decade, it estimated the cost at \$630.7 million. By comparison, the biggest pedestrian project yet done in Central Arkansas, the Big Dam Bridge, cost about \$12.5 million. The Big Dam Bridge connected the western loop of the Arkansas River Trail, brought national media attention, and gave the region claim to the longest purposebuilt dedicated pedestrian bridge in the world.

The idea behind trail-oriented development is that well-connected pedestrian- and bike-friendly places are popular, and draw tourists, as well as businesses and residential development. Trail-oriented developments are often located in and near city centers, universities, and older inner-suburban

neighborhoods. Pedestrian infrastructure investments in cities as different as Dallas, Atlanta, Indianapolis, Salt Lake City and San Francisco have all shown a correlation with climbing property values.<sup>2</sup>

Several U.S. metro areas have seen a revolution in trailoriented development over recent years, boosted by new demographics and changing consumer tastes. Such developments are often advanced via public-private partnerships. The Atlanta Beltline and the Razorback Greenway in the Northwest Arkansas region are examples where trails are leveraging major private investments in new housing and businesses. It's a nice idea, but what's all this got to do with the Little Rock region?

More than you think has gone on already, and the opportunities for future trail-oriented development are almost limitless. Read on and you will find them. **M** 

# **Economic Impact**

# The Big Dam Bridge 100

Even aside from quality of life and property values, real economic benefits can be directly attributed to the local trail system. A small example is offered by the Big Dam Bridge 100, an annual cycling tour. In 2018 a total of 3,436 bikers competed, coming from 33 states as far apart as California and Rhode Island. The North Little Rock Convention and Visitors Bureau estimates that this ride generated—in one weekend—total business sales of \$882,360, or the better part of a million dollars. The Bureau estimates the event generated 1,093 room-





The popular Big Dam Bridge 100 cycling tour offers beautiful scenery and five routes ranging from 15 miles to 100 miles. Photos: <u>the bigdambridge100.com</u>

nights for local hotels, and sales tax revenues of \$11,000. The Little Rock Convention and Visitors Bureau estimates a total economic impact at \$1,355,138. That's a total impact around \$2.2 million in one weekend.

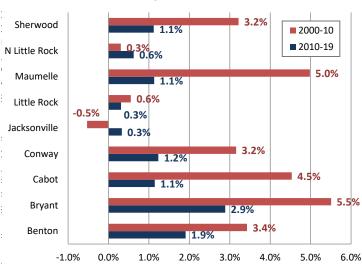
<sup>&</sup>lt;sup>1</sup> Riggs, Trisha. "Trail-Oriented Development: the Next Frontier in People-Friendly Design," Urban Land Institute April 25, 2016.

# Population Trends in Late Decade

Metroplan's 2019 population estimates come with the warning that any estimates nine years past the latest census are subject to a larger error factor than those made early in the decade. In a never-ending effort to get it right, we adjusted the population of Little Rock downward based on the latest information coming from the Census Bureau. Little Rock is now shown below 200,000, and this adjustment also pulls down the Pulaski County total from almost 399,000 in last year's estimate to the vicinity of 396,000 today. The city of Austin in Lonoke County was also adjusted downward by several hundred from last year's estimate, although it remains the region's fastest-growing city by percent.

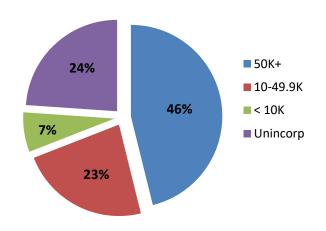
The chart below gives the percent of regional population by city size. As you can see, 48 percent—nearly half—of people in the four-county Little Rock region live in its three largest cities: Little Rock, North Little Rock and Conway, that is, the cities with over 50,000 population. About 23 percent of regional population lives in cities larger than 10,000 but under 50,000. This is a group of six cities, from Maumelle (a little over 18,000) to Benton (over 36,000). Next come the small cities, with under 10,000 population, the largest being Greenbrier, Ward, Vilonia, and Haskell. They account for

# **Central Arkansas Cities: Annual Population Growth Rate**

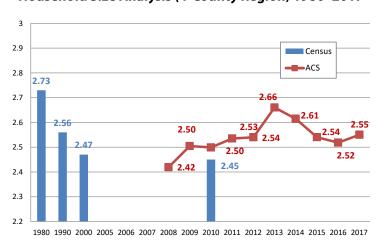


about seven percent of regional population. Yet many of these are the region's fastest-growing places and past experience has shown that several of these small places will continue growing into much larger places. Finally, despite continuing urban growth and annexations, 24 percent of the region's population (nearly a quarter) lives in unincorporated areas in the outer fringes of Faulkner, Lonoke, Pulaski and Saline Counties. M

### **Share of Regional Population by Population Size** in 2019



### Household Size Analysis (4-County Region) 1980-2017



The region's average household size trended down for decades, but if recent ACS figures are correct, it has been trending mostly upward since 2010.

# Population Change

# Little Rock-North Little Rock-Conway MSA Population Change 2010–2019

Faulkner County	2010	2019	Change
Conway	58,908	65,574	11.3%
Greenbrier	4,706	5,589	18.8%
Mayflower	2,234	2,520	12.8%
Vilonia	3,815	4,583	20.1%
Wooster	860	1,103	28.3%
Small communities	2,245	2,697	20.1%
Unincorporated	40,469	43,299	7.0%
County Total	113,237	125,365	10.7%

Grant County	2010	2019	Change
Sheridan	4,603	4,935	7.2%
County Total	17,853	18,188	1.9%

Lonoke County	2010	2019	Change
Cabot	23,776	26,266	10.5%
Austin	2,038	3,145	54.3%
Ward	4,067	5,406	32.9%
Lonoke	4,245	4,369	2.9%
England	2,825	2,725	-3.5%
Carlisle	2,214	2,174	-1.8%
Small communities	751	745	-0.8%
Unincorporated	28,440	28,049	-1.4%
County Total	68,356	72,879	6.6%

Perry County	2010	2019	Change
Perryville	1,460	1,455	-0.3%
County Total	10,445	10,352	-0.9%

Pulaski County	2010	2019	Change
Little Rock	193,524	198,816	2.7%
North Little Rock	62,304	65,791	5.6%
Jacksonville	28,364	29,190	2.9%
Sherwood	29,523	32,538	10.2%
Maumelle	17,163	18,935	10.3%
Wrightsville	2,114	2,156	2.0%
Cammack Village	768	741	-3.5%
Alexander*	236	238	0.8%
Unincorporated (N)	25,410	24,912	-2.0%
Total North of River	162,764	171,366	5.3%
Unincorporated (S)	23,342	22,884	-2.0%
Total South of River	219,984	224,835	2.2%
Total Unincorporated	48,752	47,796	-2.0%
County Total	382,748	396,201	3.5%

Saline County	2010	2019	Change
Benton	30,681	36,194	18.0%
Bryant	16,688	21,049	26.1%
Shannon Hills	3,143	3,807	21.1%
Haskell	3,990	4,539	13.8%
Alexander*	2,665	2,565	-3.8%
Traskwood	518	543	4.8%
Bauxite	487	493	1.2%
Unincorporated	48,946	51,974	6.2%
County Total	107,118	121,164	13.1%

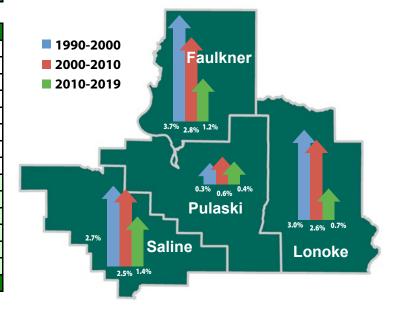
Hot Springs Village CDP	2010	2019	Change
In Saline County	6,046	6,859	13.4%
In Garland County	6,761	6,801	0.6%
HSV Total	12,807	13,660	6.7%

City of Alexander Total	2010	2019	Change
Alexander	2,901	2,803	-3.4%

4-County Region	671,459	715,609	6.6%
6-County MSA**	699,757	744,149	6.3%

<sup>\*</sup>Represents portion of Alexander by county \*\*Official MSA since May 2003

# **Annualized Population Growth Rates** Four-County Region 1990 to 2019



# Rockwater Village

Around the year 2005, Lisa Ferrell and her husband Jim Jackson began acquiring land in North Little Rock along the Arkansas River near downtown. It was a dream, not idle land speculation. In the past fourteen years the dream has morphed into a practical reality. A declining neighborhood once known for police calls and ER visits has turned into a walkable, livable area on the 16-mile Arkansas River Trail bike/pedestrian loop with a mix of apartments and high- and middle-end singlefamily homes. More is coming, which (like before) will hit several price-points, not just the high end. Its in-city location allowed Rockwater to bypass the costs for sewer and water line extensions. This could explain—at least in part—why even high-end homes in Rockwater sell for no more than nice new homes in other nearby Central Arkansas locations.

Despite the neighborhood's obvious advantages and enormous potential, Lisa admits that creating New Urbanist infill development is "an uphill lift" without the kind of strong cooperation Rockwater got from local governments. In most U.S. cities, for example, zoning requires a lengthy setback from the street, putting the kibosh on front porches. Instead, the City of North Little Rock has flexed its zoning laws to help. Rockwater then uses property-based Bills of Assurance to guarantee that each property meets design and landscape requirements. Rockwater requires front porches at least eight feet deep, spacious enough for chairs, tables, and friendly chats with passers-by. The design reduces barriers to neighborly interaction, and it works.



The Rockwater Marina rode out the high water in 2019 without damage. Rockwater residents enjoy views of the Arkansas River and downtown Little Rock, as well as easy access to Argenta in North Little Rock



Rockwater Village has developed in stages, beginning with the Riverside at Rockwater Apartments in 2012. Source: <a href="https://www.rockwatervillage.com/">https://www.rockwatervillage.com/</a> about/master-plan



Bikers, joggers and walkers mix in casually with high-end homes.

Okay, nice neighborhood, financial success. But... trail-oriented development? Absolutely, Lisa and Jim agree. Lisa confidently pronounces it all amounts to \$50 million in new land value, leveraged by the trail system. The neighborhood, Jim points out, used to be a drain on city coffers, but now yields respectable property tax revenues. Lisa and Jim cite anecdotes of residents who have been lured in by the trails. In one case, a biker was riding the River Trail, saw the signs for Rockwater, and placed a call. Before the day was out he had purchased a lot. A surprising portion of today's Rockwater homeowners came from outside the Little Rock region. Some of the bike-riders you see on the trail are business-and-training visitors from as far

away as Chicago and San Francisco, in extended-stay hotels and biking for recreation. New residents are lured by the site's natural beauty, the sense of neighborhood, and housing prices that are modest by national standards.

Lisa and Jim are interested in more than residential development. They already own the land for the Orbea bike distribution center on Broadway Street, just east of the Rockwater site. The plentitude of local and out-of-town bike visitors, and intimations of sales potential in the area, suggest there is demand for specialized retail space serving local residents and trail users. It might be modeled on the Katy Trail Ice House in Dallas, a highly-successful beer garden/restaurant combination. A boutique hotel catering to out-of-town trail users is another possibility. Accessibility is good, just off Pike Avenue served by a smoothly-flowing roundabout. Rockwater is within census tract 30.01, which has been designated an Opportunity Zone tract. In practical terms, the tax break gives Opportunity Zone developments a three percent boost to their IRR (internal rate of return). M





Homes in the Porches at Rockwater offer moderate prices in a walkable, high-quality neighborhood.

### **Rockwater Units**

Area	Parcels / Units	Sold	Remaining	Price-Point	Year Started
Riverside at Rockwater	264 apartments				2012
Residences at Rockwater	39	38	1	\$500k +	2015
Porches at Rockwater	15	8	7	\$270K	2018
Gardens at Rockwater	43	0	43	\$325K	Fall 2019



Some people buy into Rockwater after seeing the possibilities while jogging, walking, or biking the Arkansas River Trail.



The Riverside at Rockwater is a 264-unit apartment complex directly adjacent to Rockwater's highest-value single-family homes.

# When Trail-Oriented Development Slaps You in the Face

When Salter Properties began constructing the Centerstone apartments in 2010, the site just south of Dave Ward Drive lacked trail access. The developers knew, however, that the new 262-unit apartment complex adjoined the city's planned Stone Dam Creek Trail, and the firm provided a trail easement in back of its property. Today, a new pedestrian bridge spans Dave Ward Drive. Walkers and bikers from the apartments use the trail to shop, recreate, and get to class at the nearby University of Central Arkansas.

Salter Properties used to do land development the conventional way. In the words of Brent Salter, their business model used to be to "go out and build

in the middle of nowhere." Now, Salter picks sites that are on trails or in sidewalk-rich urban neighborhoods. It sometimes pays a little more for the land, but the compensating advantage is that infrastructure like roads, sewer and water lines are already in place.

The key is finding sites that have "good bones," not just with trail access, but also—where possible—with walkable urban environments and public transportation. Salter Properties did the Argenta Flats apartments in downtown North Little Rock,



Bikers enjoy a sunny morning on Tucker Creek Trail.

adjacent to the River Rail trolley line, which Brent Salter endorses for the value it added. Salter also did the J Lofts project in downtown Conway and The Rowhouses in The Village at Hendrix. Today the firm is designing a mixed-use complex in Russellville, walkable between downtown and the Arkansas Tech campus, and which will in the future include a bike trail.

It's not a question of whether or not trail-oriented development is more profitable—it is—but rather why more developers aren't doing it. It's probably fear of change, Brent allows, but at his firm change is good, and trails are a key competitive advantage. By going into already-developed areas Salter can build

a new property quickly, and start renting out new units, while other multi-family developers sometimes spend eight or ten months getting their sites ready. Trail access means more client demand. At the Centerstone apartments on the Stone Dam Creek Trail, the units in back—overlooking the trail—have the highest demand. "Look at examples like the Beltline in Atlanta and the Katy Trail in Dallas. It should slap you in the face," Brent Salter told us about public trails, "how a few public dollars can spur huge amounts of private investment." M





The Centerstone Apartments provides space for Conway's bike share program. The aparments in back—next to the trail—keep the highest occupancy rates.

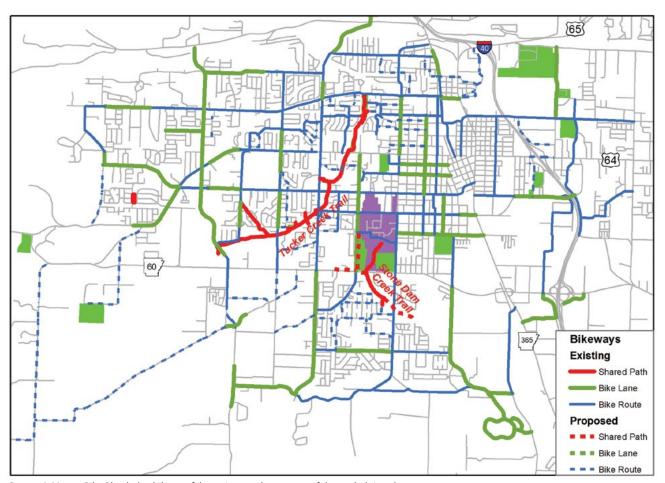


A new bridge gives those living south of Dave Ward Drive direct access to the UCA campus.



# Haven on the Trail

Haven House is a Conway-based nonprofit that houses adolescent girls for foster care, or to provide a home for young women removed from their homes by the state. It takes up to 60 girls a year, and houses 12 at a time. In operation since 1986, Haven House needed a new home that was larger and more up-to-date than its current facility. A site adjacent to the Tucker Creek Trail made a great fit, giving the girls a safe place to ride bikes, walk with staff, and mingle with residents.



Conway's Master Bike Plan helps bikers safely navigate at least some of the asphalt jungle.

# Housing Construction Stable in 2018

Regional housing construction ticked down in 2018 compared with the year before, but the overall total of over 2,200 units remained higher than most recent-past years since about 2013. Single-family housing was stable, with 1,313 units started in the region's nine largest cities. Maumelle saw the largest up-tick, at 34 percent, from 58 to 78 units. Conway was up 30 percent, to 187 new units in 2018. Bryant came in third, with 20 percent growth in new units over 2017. In contrast, Little Rock saw a down-shift of about 14 percent, and Jacksonville was down by nearly 50 percent.

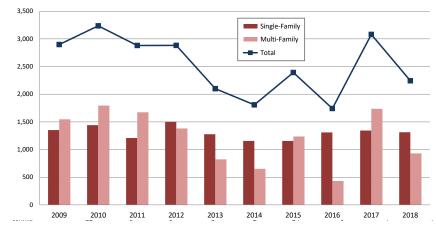
Multi-family housing ran more slowly in 2018 after a banner year for new construction in 2017. The bulk of new apartment construction was in Little Rock, led by the Wimbledon Green complex off Baseline Road west of I-430, the

smaller Renaissance Pointe complex north of Cantrell Road in western Little Rock, and a few other smaller projects including additions to the Chenal Pines retirement community. Conway saw a new 144-unit project, Fountaine Bleu, started near the old airport site on Bruce Street and numerous smaller duplex, triplex and four-plex units mostly east of I-40. The multifamily index below shows that, during most quarters over the past two years, the Little Rock region has exceeded U.S. trends in multi-family construction. M

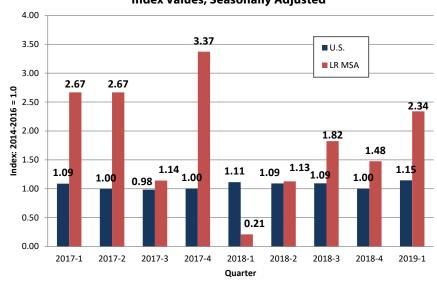


The J Lofts Apartments blend into the urban fabric in Conway's revitalizing

### Regional Housing Unit Permit Totals 2009–2018



# **Multi-Family Construction Index 2017–2019 Index Values, Seasonally Adjusted**





There is little room left in Little Rock's city limits for all new "green field" single-family houses, but growth continues in places like this new neighborhood near Wildwood. Further growth may hinge on expensive infrastructure investments in sewer and street capacity.



Tear-downs are followed by larger rebuilds in Little Rock's Heights neighborhood.

# Half Year (January–June) Housing Unit Permits 2015-2018

### **Single-Family**

	2015	2016	2017	2018
Benton	160	159	146	152
Bryant	79	135	126	150
Cabot	96	90	106	107
Conway	145	208	144	187
Hot Sprgs Vill	60	40	45	58
Jacksonville	43	35	61	32
Little Rock	318	331	362	309
Maumelle	35	53	58	78
N Little Rock	93	76	90	85
Sherwood	187	223	250	213

### **Multi-Family**

	2015	2016	2017	2018
Benton	632	22	52	4
Bryant	0	16	4	0
Cabot	29	0	76	8
Conway	10	61	115	259
Hot Sprgs Vill	0	0	0	0
Jacksonville	0	4	4	8
Little Rock	457	247	1043	539
Maumelle	108	0	0	64
N Little Rock	0	82	435	48
Sherwood	0	0	8	0

# **Regional Totals**

	2015	2016	2017	2018
Total SF	1,156	1,310	1,343	1,313
Total MF	1,236	432	1,737	930
Grand Total	2,392	1,742	3,080	2,243

Note: regional totals shown above exclude Hot Springs Village, part of which extends into Garland County beyond Metroplan's area.



The Fountaine Bleu Apartments in Conway will host 144 units on the redeveloped site of the city's old airport.

# Demographic Outlook 2019

The regional trend of slow but steady population and housing growth continues. Homeownership, which declined after the housing bust began hitting in 2005, has turned back upward at the national level, from a low of 63.4 percent in 2016 to about 64.4 percent of all housing by 2018. Local data has also shown an uptick in homeowners, from a low of 62.6 percent in 2016 to 63.6 percent in 2017. Local figures for 2018 are not yet available.

Multi-family construction continues at a steady pace in the region, suggesting demand remains firm. During the January-May period, employment growth in the Little Rock MSA ran slightly faster than the U.S. rate. If the trend holds through the remainder of 2019, it will be the first time local job growth has exceeded U.S. growth since about 2009. Housing demand should therefore remain steady at minimum.

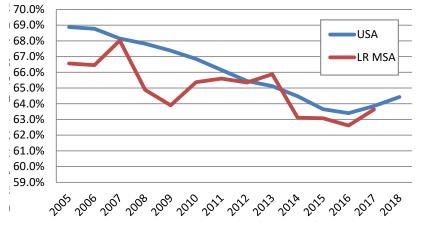
Recent national-level data from Census Bureau estimates show that suburbs are regaining some headway lost in the Great Recession. In Central Arkansas, suburban locations did not decline as severely as ones at the national level, and are continuing a steady pattern. Saline County continues to see fast housing growth. Several redeveloping areas in mid-city locations continue showing slow population growth. Little



The Heart of Bryant neighborhood, featured in the July 2018 Metrotrends newsletter (pp. 4-5) is beginning to take shape with these homes. Just west of Reynolds Road in Bryant, they feature small front lots with garages in back in a walkable new urbanist setting.

Rock's Pettaway neighborhood has seen single-family housing additions, while tear-downs accompanied by upscale newhome replacements continue in established areas like Pulaski Heights, Hillcrest and Cammack Village. A steady stream of small and mid-sized multi-family complexes have rounded out the picture of revitalization in older parts of town in the cities of Little Rock, North Little Rock and Conway. M

# **Owner-Occupied Homes** (Share of Total Housing) 2005-2018



- 1. U.S. Bureau of the Census, Quarterly Housing Inventory.
- 2. American Community Survey one-year data, 2007-2018.



Artist rendering provided by Newmark Moses Tucker Partners.

# The Vue in Downtown Argenta

This edition of the Metrotrends newsletter, featuring trail-oriented development, had progressed to the brink of publication when another new trail-connected project was announced. This will be The Vue, a 244-unit \$35.6 million upscale apartment complex. Its buildings will be three and four stories in height, with high-end amenities and a mix of covered and enclosed-garage parking. It will represent the first venture into the North Little Rock downtown market by Newmark Moses Tucker Partners (NMTP), a vital developer in Little Rock's highly successful River Market District. And it is located right next to the Arkansas River Trail.

### Census 2020

Census day is coming up—officially on April 1, 2020. Expect U.S. and state-level counts by late December 2020, and local counts in early March, 2021. Arkansas is typically one of the earliest states to receive official census counts due to state election law requirements. Census 2020 will include the option to contribute electronically without the need for paper, although census forms will still be sent out via mail. Low unemployment may prove a challenge for hiring temporary census workers, in stark contrast with 2010 when recession conditions almost certainly boosted recruitment.

A court decision seems to have finally resolved the citizenship question. The complete-count census will

not include any questions on citizenship, while the annual ACS will continue to survey citizenship via sampling techniques, as it Census 2020

has done for many years. Some experts have suggested that public alarm about immigration-law enforcements may dampen census participation, despite the court decision blocking a citizenship question. In July, 2019, the Microsoft Corporation signed on as an official Census 2020 partner with its Defending Democracy Program, which aims to protect systems from hacking, disinformation and misinformation.

# Statistical Supplement—Commuting Flows

New data on commuting flows shows a familiar pattern in Central Arkansas. The majority of the region's jobs are in Pulaski County, especially Little Rock, and many residents of outlying Saline, Lonoke and Faulkner Counties commute to them. The region's commuting pattern is more radial in nature than average, meaning a constant inward flow to jobs from residences in the suburbs. The region has relatively few residents making "orbital" commutes from one suburb to another, and the bulk of suburb-to-suburb flows also follow the inward radial pattern.

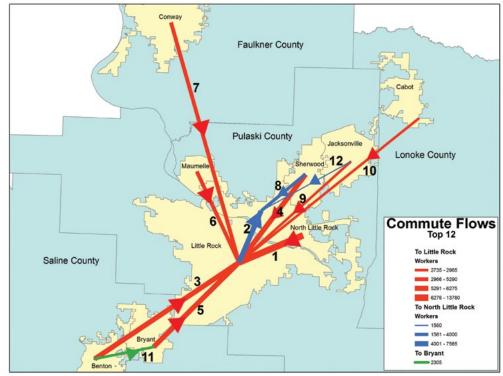
As the table shows, the largest flow is simply across the river from North Little Rock to Little Rock. The return flow ranks second. In the latest data, Benton has replaced Sherwood as the second-largest contributor of workers commuting to Little Rock. The flow of workers from Bryant to Little Rock has displaced Maumelle as the fifth-largest flow in the region. **M** 

City-to-City Commuting in LR Region 2012-2016

Rank	Residence	Workplace	Total Workers
1	North Little Rock	Little Rock	13,780
2	Little Rock	North Little Rock	7,565
3	Benton	Little Rock	6,275
4	Sherwood	Little Rock	6,105
5	Bryant	Little Rock	5,680
6	Maumelle	Little Rock	5,290
7	Conway	Little Rock	4,720
8	Sherwood	North Little Rock	4,000
9	Jacksonville	Little Rock	2,965
10	Cabot	Little Rock	2,735
11	Benton	Bryant	2,305
12	Jacksonville	North Little Rock	1,560

Source: CTPP 2012-2016

### Central Arkansas City-to-City Commuting 2012–2016: Top Twelve Flows



Source: Census Transportation Planning Package (CTPP) 2012–2016.

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Photographs by Lynn Bell, Jonathan Lupton, and Casey Covington except where noted.

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This notice is available from the Title VI Coordinator in large print, or on audiotape.

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