


# Socio-Economic Trends and Future Land Use Implications

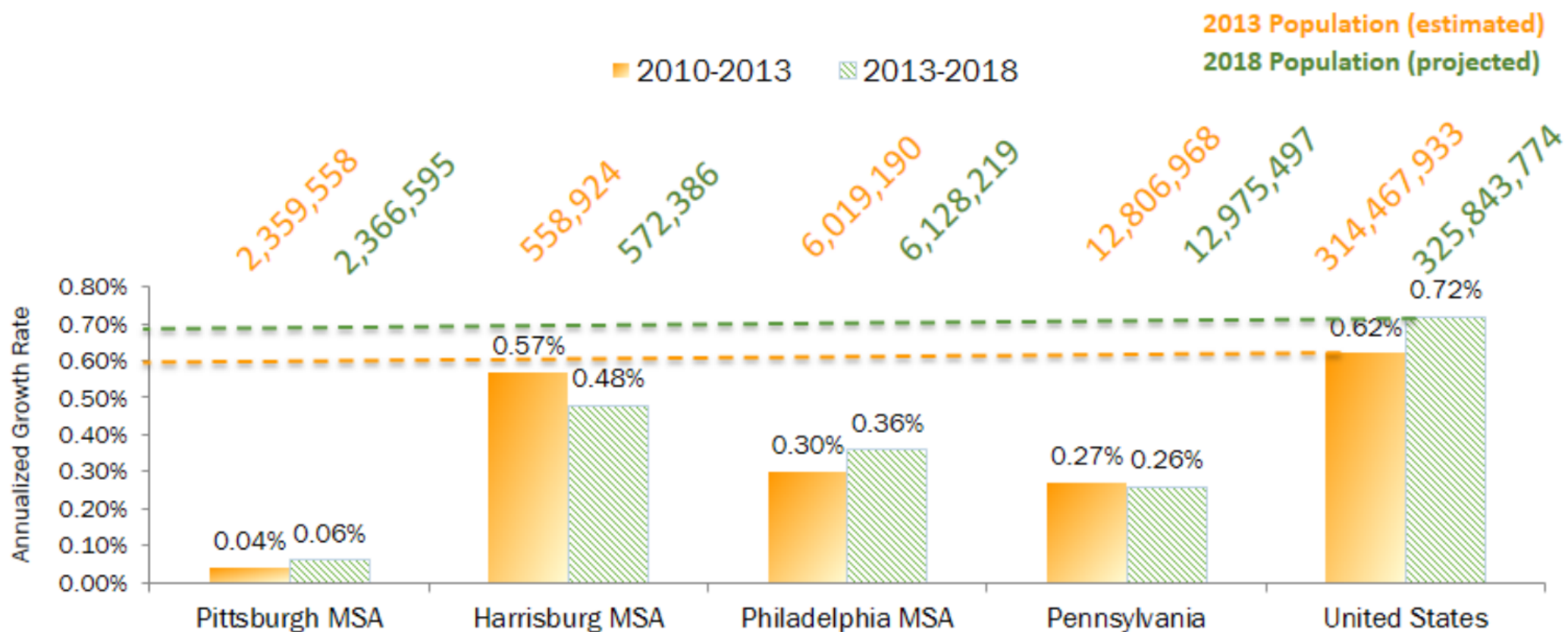
How will current and coming socio-economic trends influence land-use decisions and impacts?



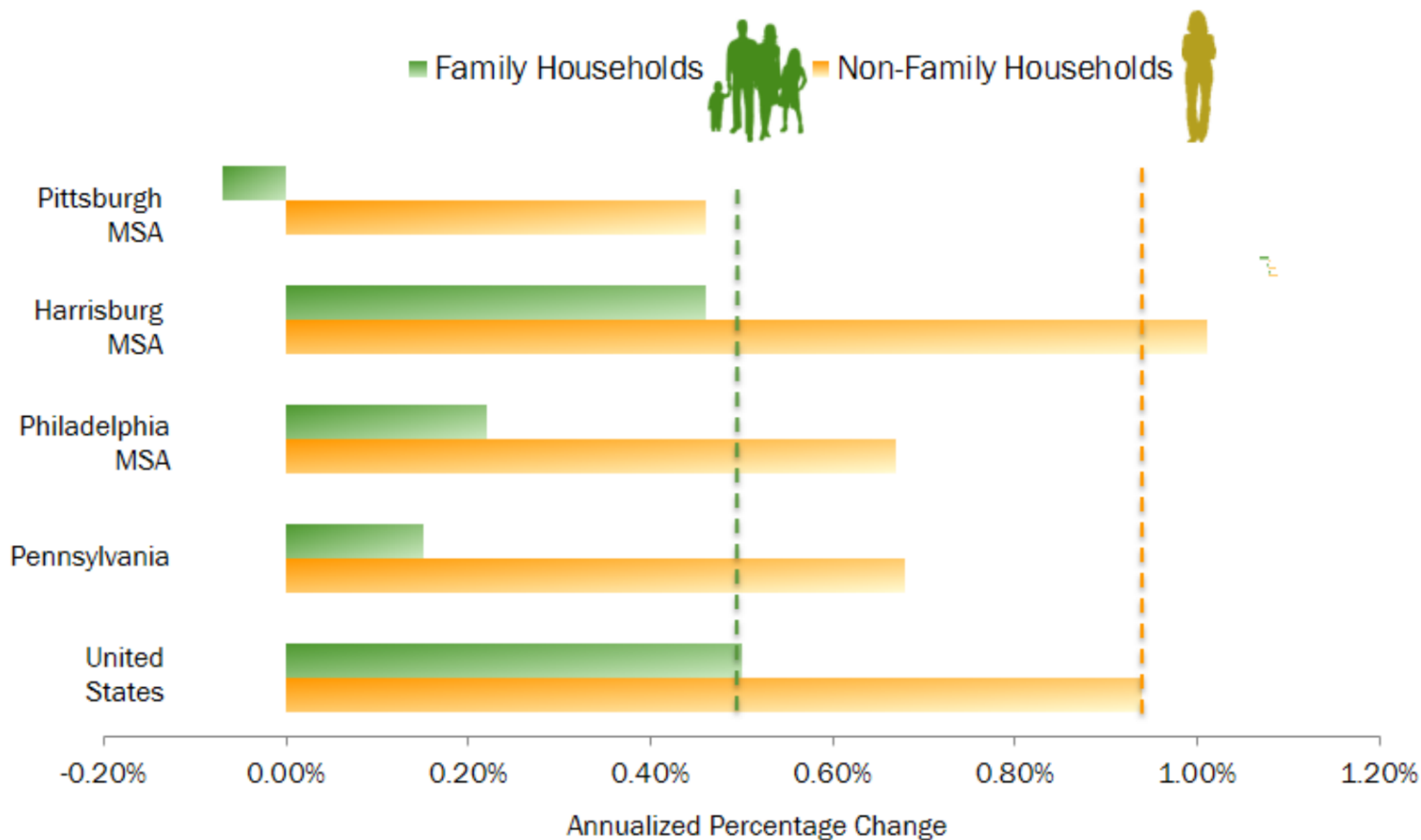
- 
- Population growth
  - Household (HH) Formation
  - HH type and size
  - Race
  - Age
  - Median HH Income
  - HH Tenure

# People

## Annualized Percentage Change, Total Population

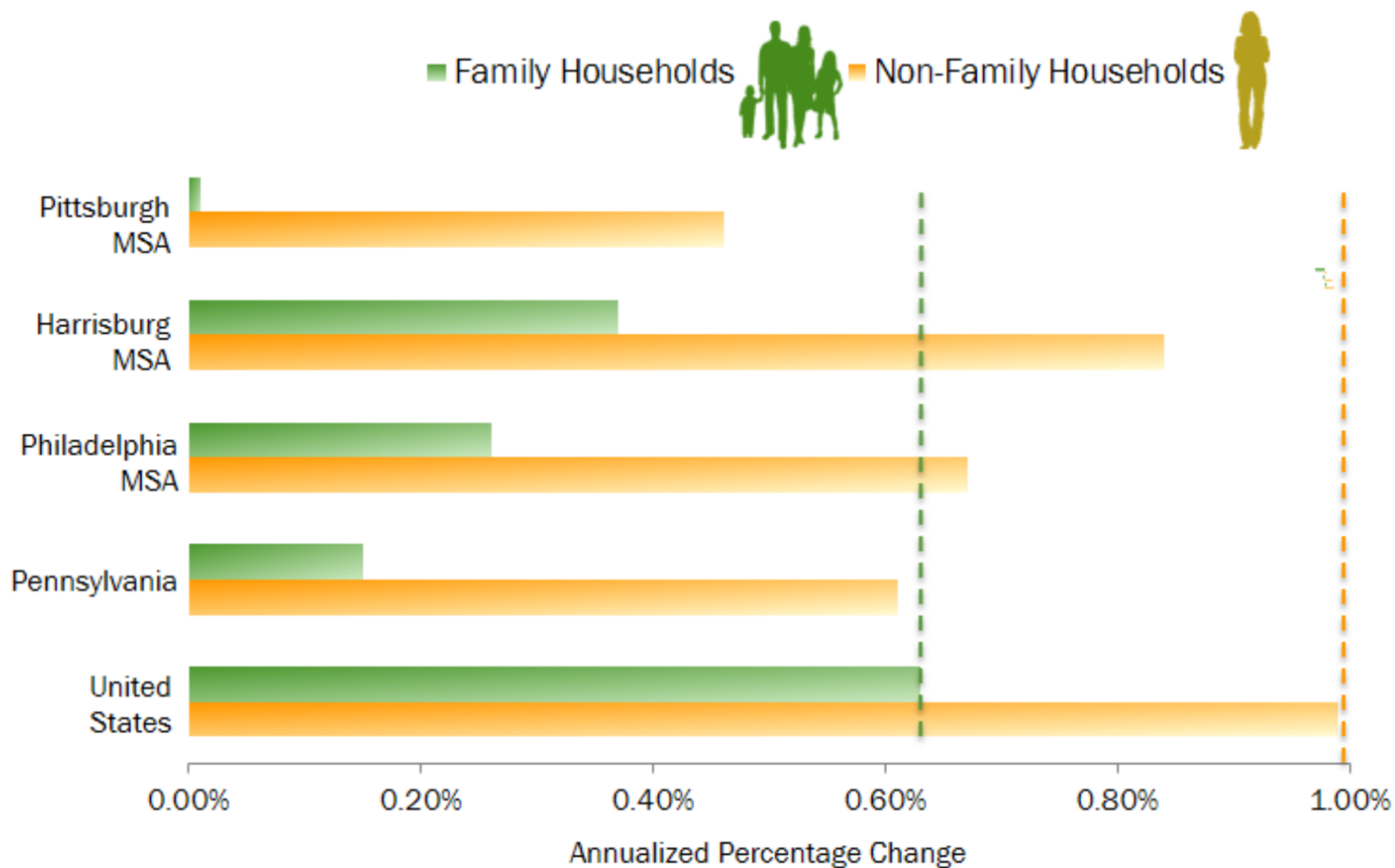


### Annualized Percentage Change, 2010-2013

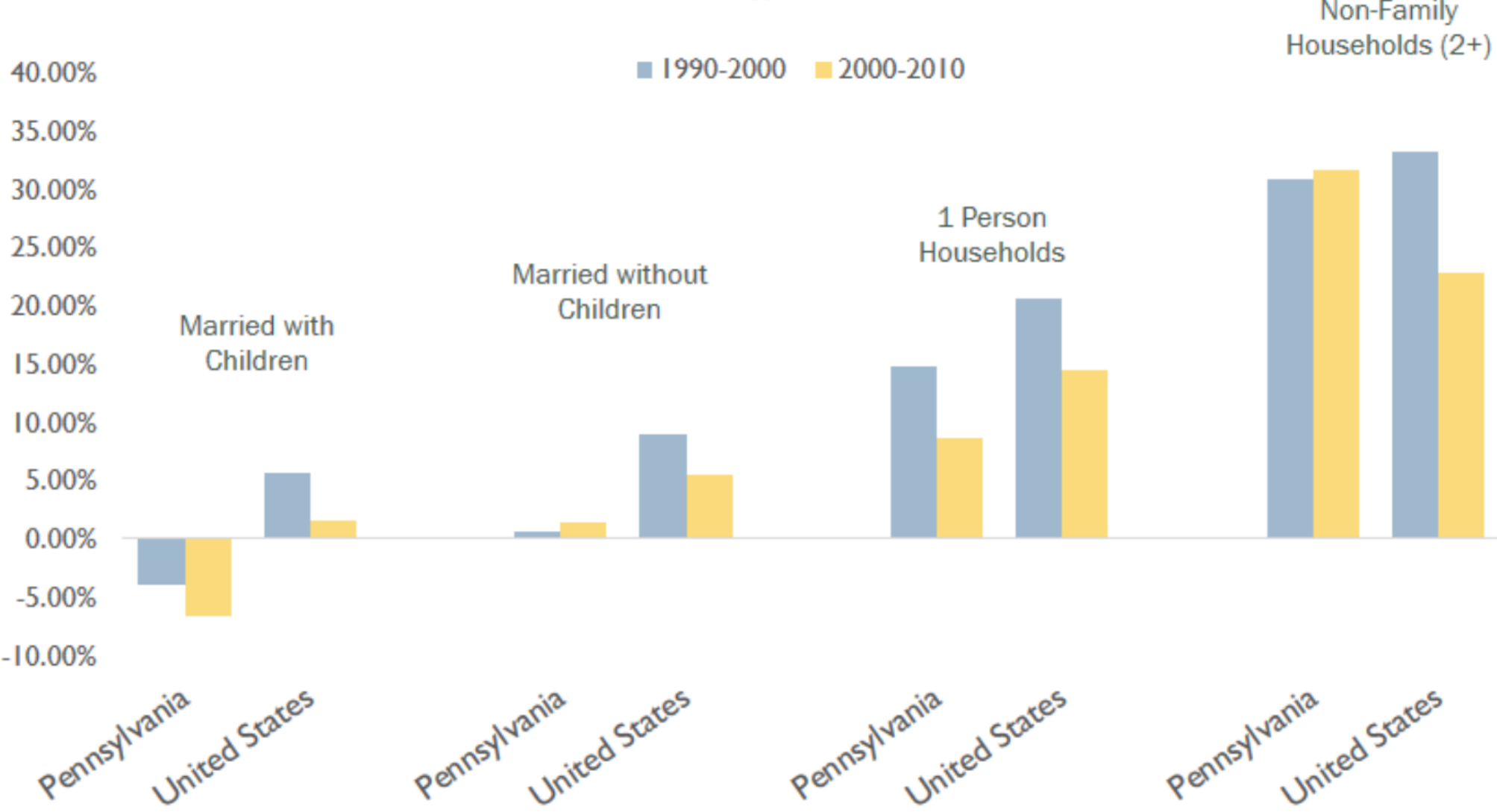




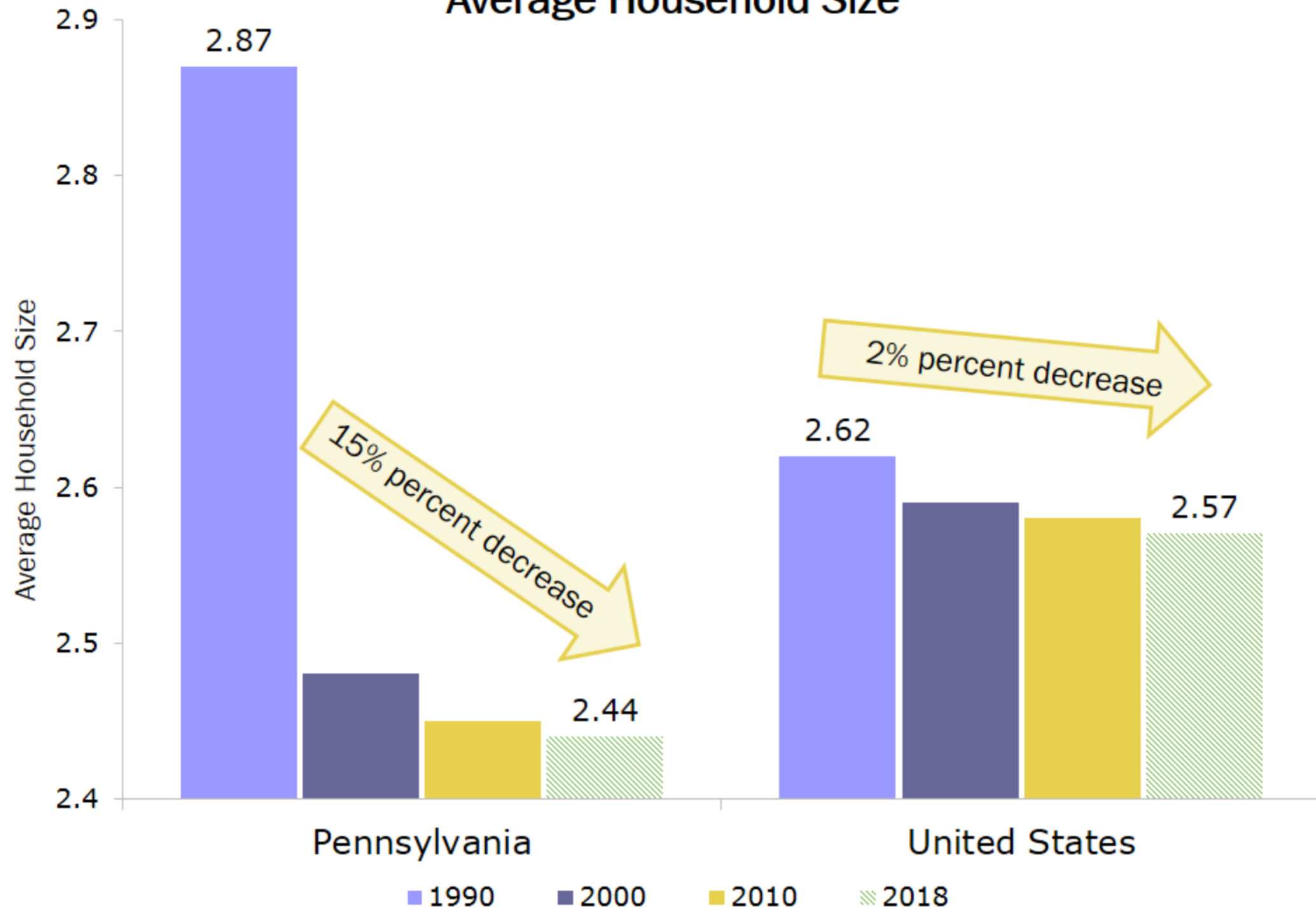
### Annualized Percentage Change, 2013-2018



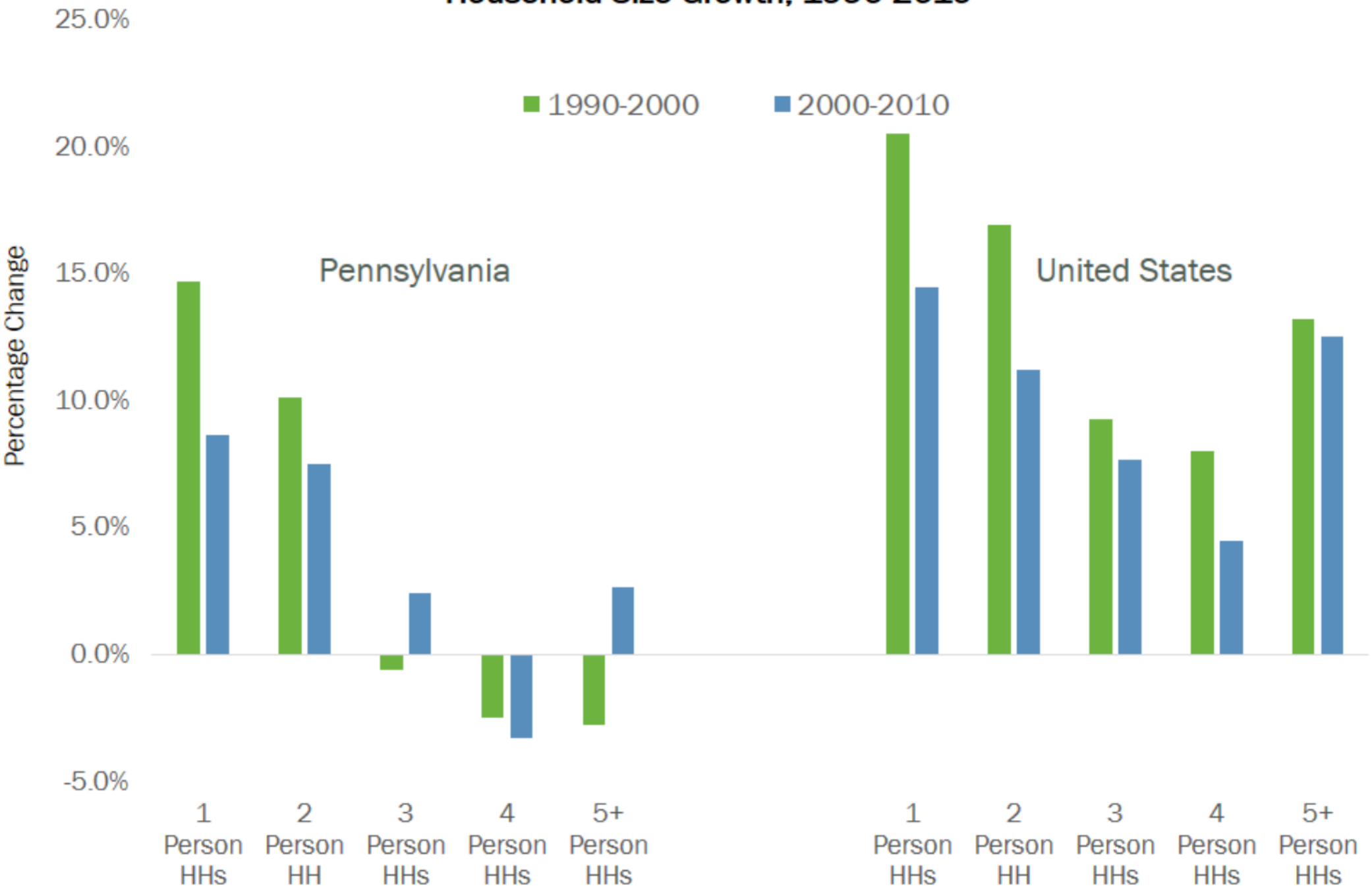
Household Type Growth, 1990-2010



## Average Household Size



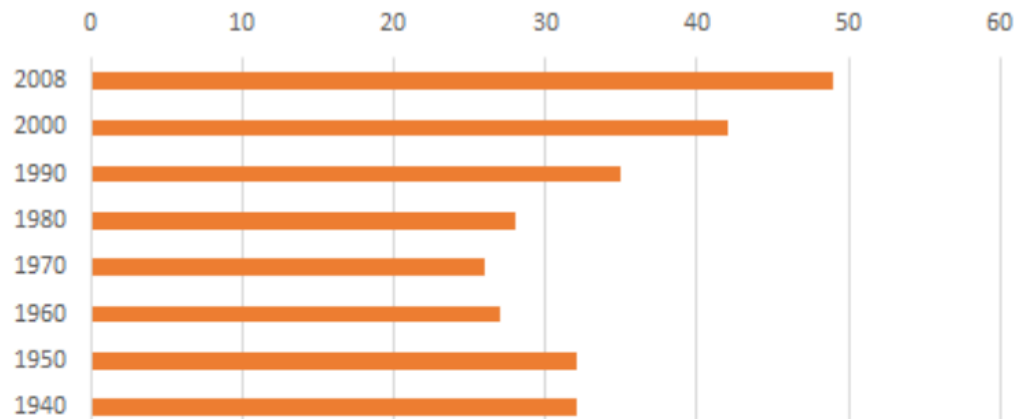
## Household Size Growth, 1990-2010



# The Return of the Multi-Generational Family Household

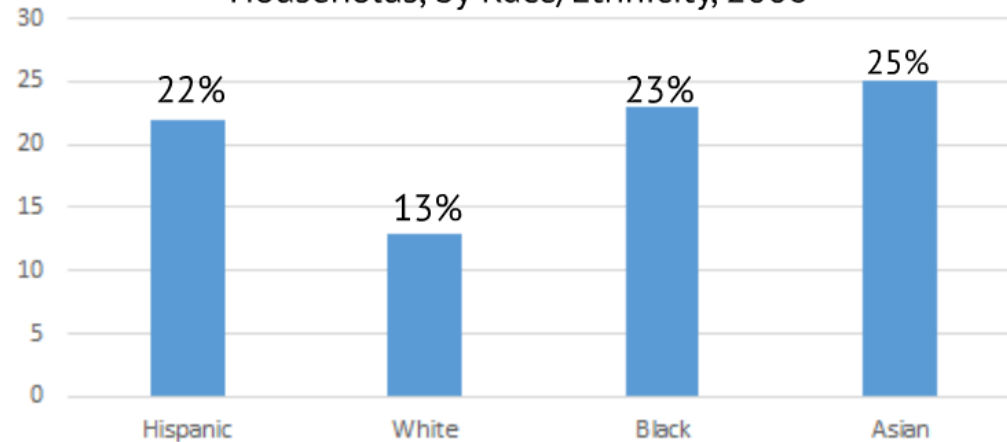
- Hispanics, blacks, and Asians are all significantly more likely than whites to live in a multi-generational family household.

US Population Living in Multi-Generational Family Households, 1940-2008 (Millions)



Source: US Census, Pew Research Center, 2010.

Share of Population in Multi-Generational Family Households, by Race/Ethnicity, 2008

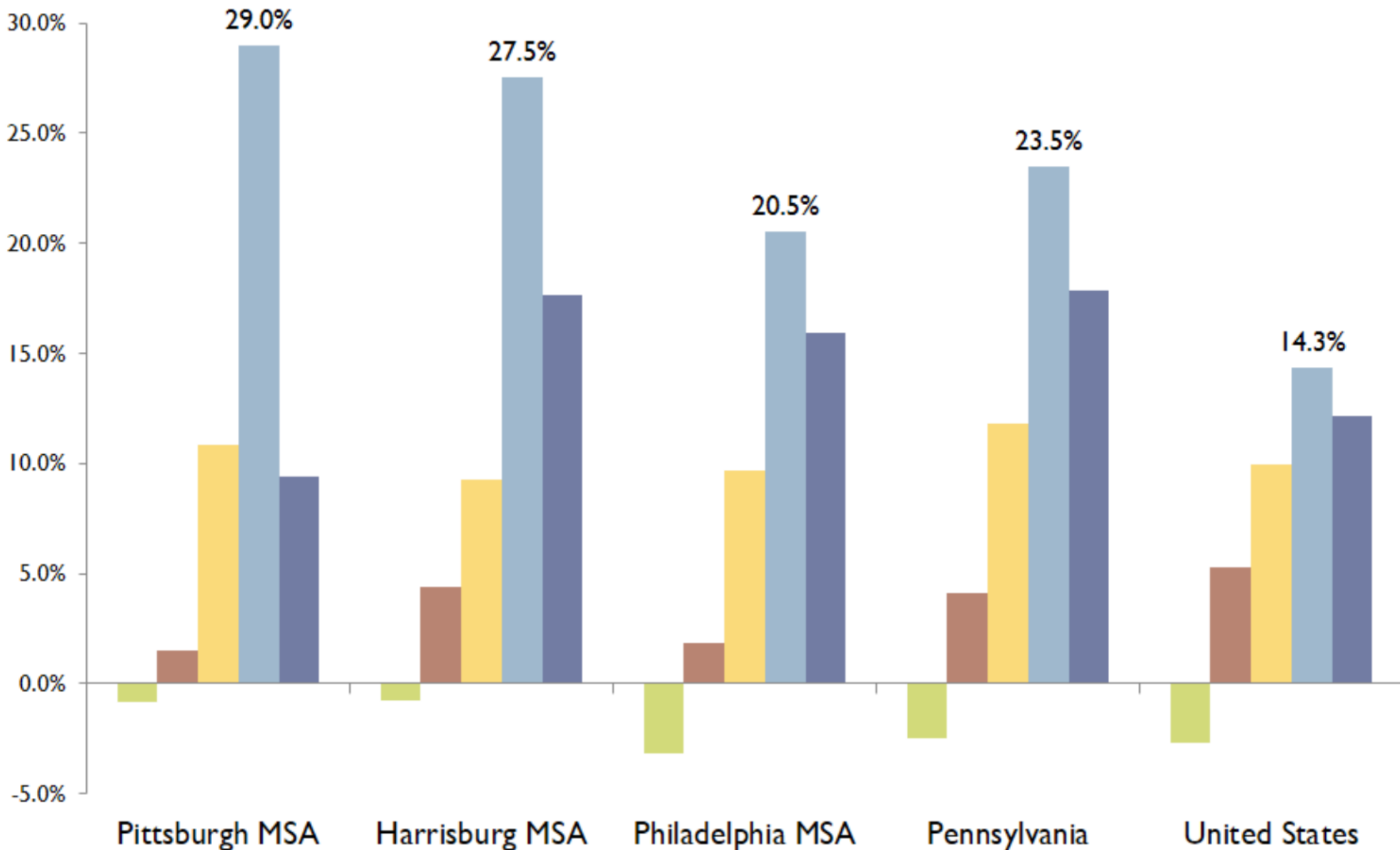


Source: US Census, Pew Research Center, 2010.



Racial Composition Changes by Percentage, 2013-2018

White Black Asian Hispanic All Others

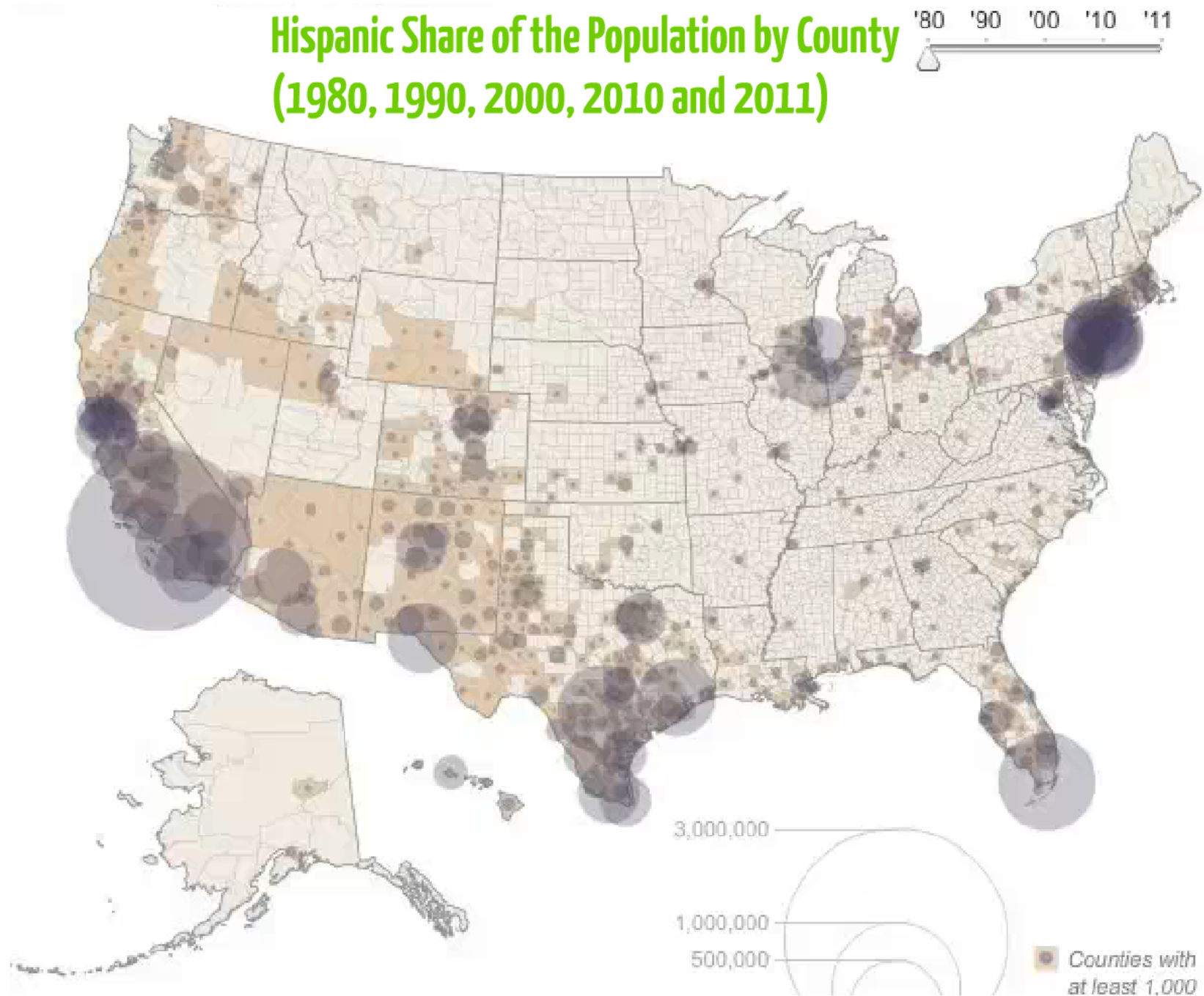


# Pennsylvania at a Glance:

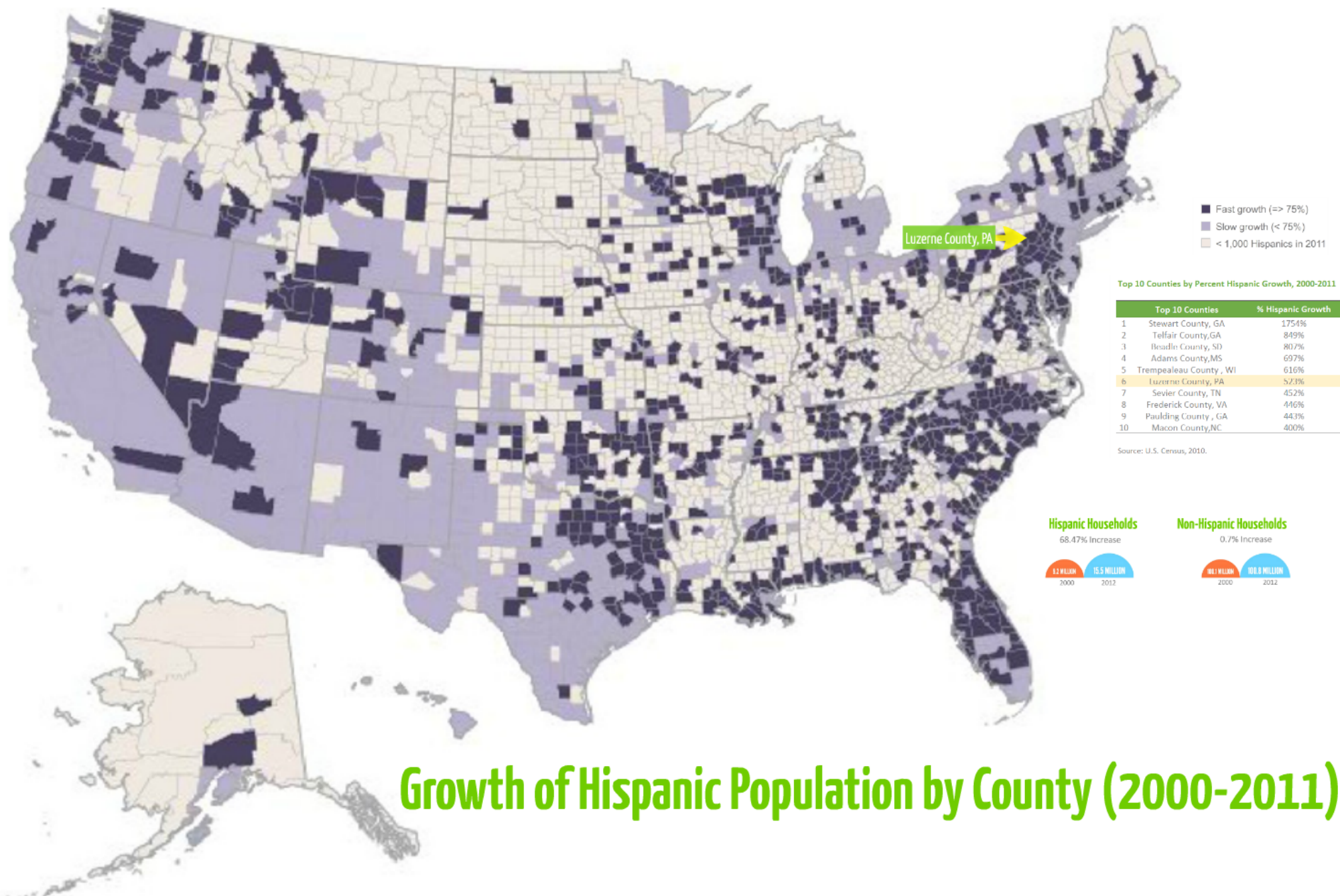
## Hispanic Population

POPULATION	750,000
PERCENT OF STATE POPULATION	6%
MEDIAN AGE	25 years
MEDIAN ANNUAL PERSONAL EARNINGS, 16+	\$20,000
POVERTY RATE, 17 AND YOUNGER	45%
WITHOUT HEALTH INSURANCE	22%
PERCENT HOMEOWNERSHIP	42%
PERCENT OF ALL K-12 STUDENT	9%

## Hispanic Share of the Population by County (1980, 1990, 2000, 2010 and 2011)



Source: Pew Research Center, Census Bureau





A map of Pennsylvania showing its counties. The counties are colored based on two criteria: Hispanic growth from 2000 to 2011 and the number of Hispanics in 2011. Dark purple indicates fast growth (>= 75%), medium purple indicates slow growth (< 75%), and light tan indicates fewer than 1,000 Hispanics in 2011. Luzerne County is highlighted with a green box and a yellow arrow pointing to it.

Luzerne County, PA

- Fast growth ( $\geq 75\%$ )
- Slow growth ( $< 75\%$ )
- $< 1,000$  Hispanics in 2011

### Top 10 Counties by Percent Hispanic Growth, 2000-2011

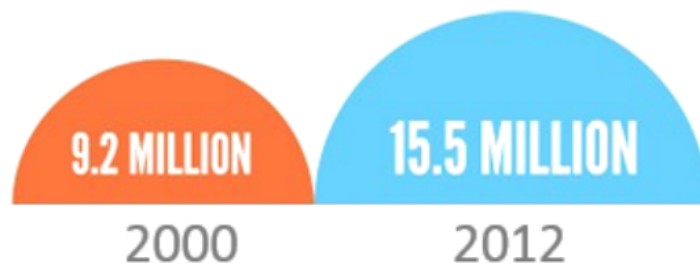
	Top 10 Counties	% Hispanic Growth
1	Stewart County, GA	1754%
2	Telfair County, GA	849%
3	Beadle County, SD	807%
4	Adams County, MS	697%
5	Trempealeau County, WI	616%
6	Luzerne County, PA	523%
7	Sevier County, TN	452%
8	Frederick County, VA	446%
9	Paulding County, GA	443%
10	Macon County, NC	400%

Source: U.S. Census, 2010.



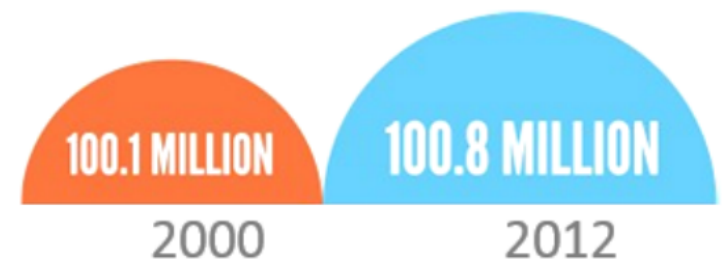
## Hispanic Households

68.47% Increase

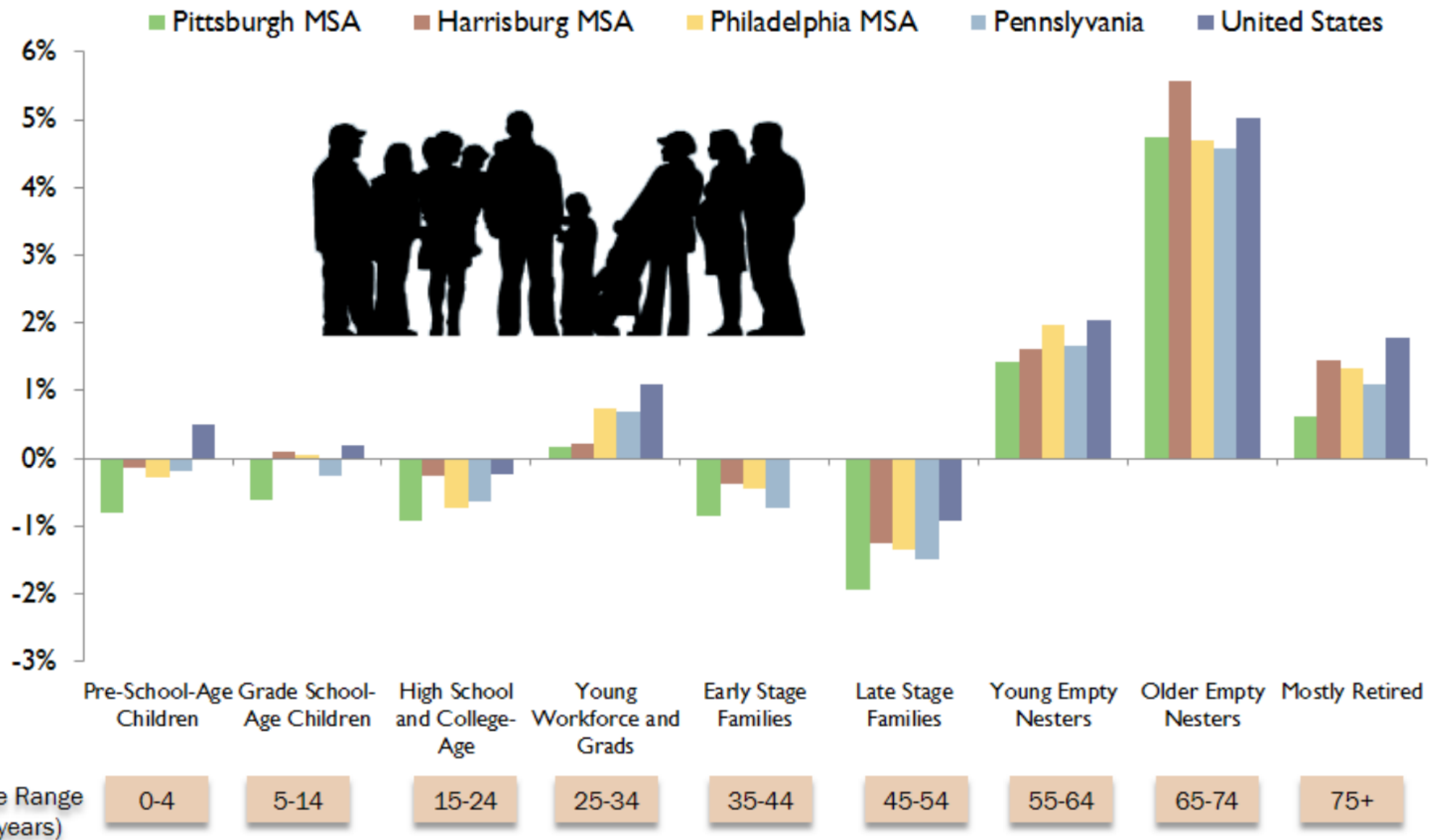


## Non-Hispanic Households

0.7% Increase

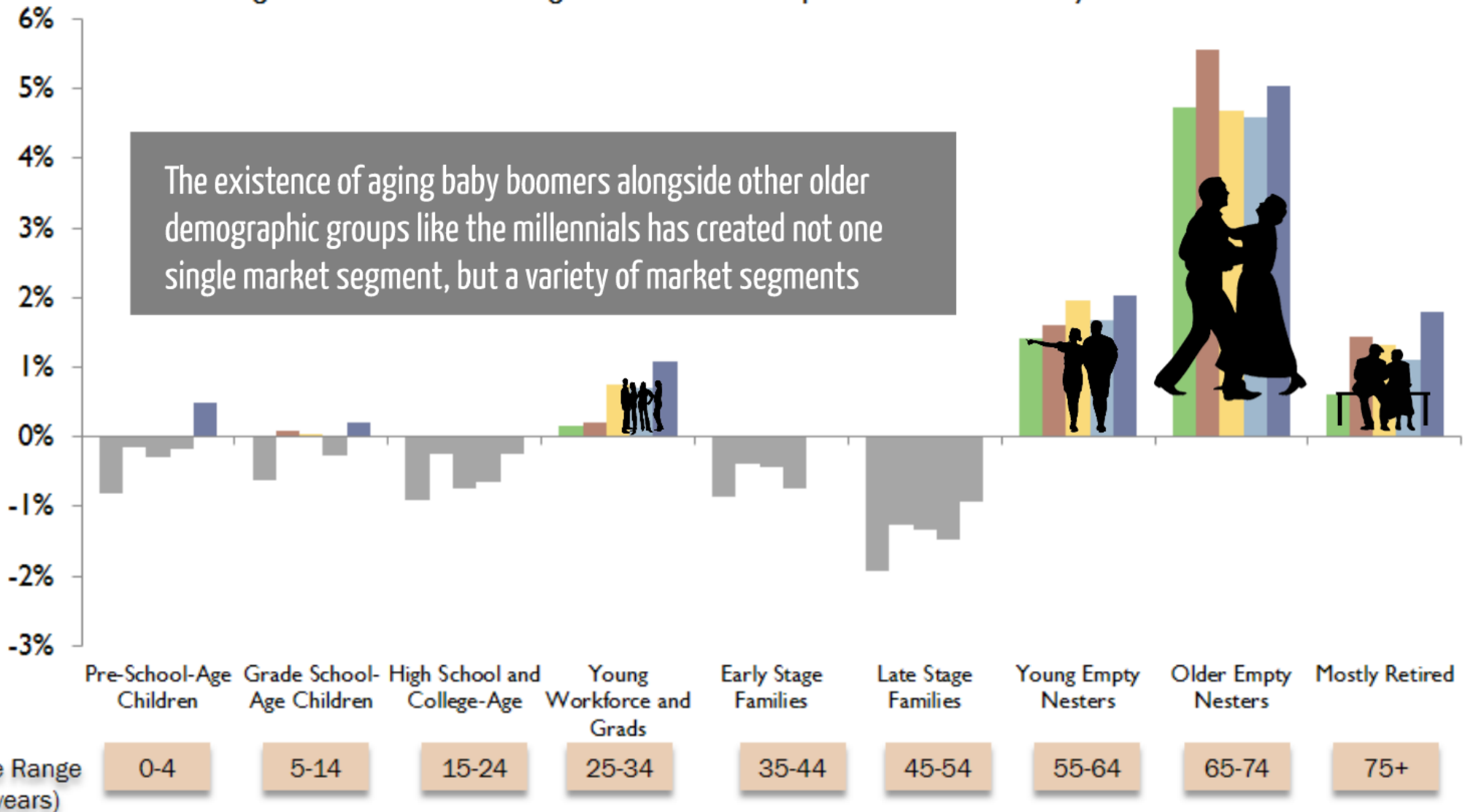


### Age Cohort Changes by Annualized Percentage Change, 2010-2018



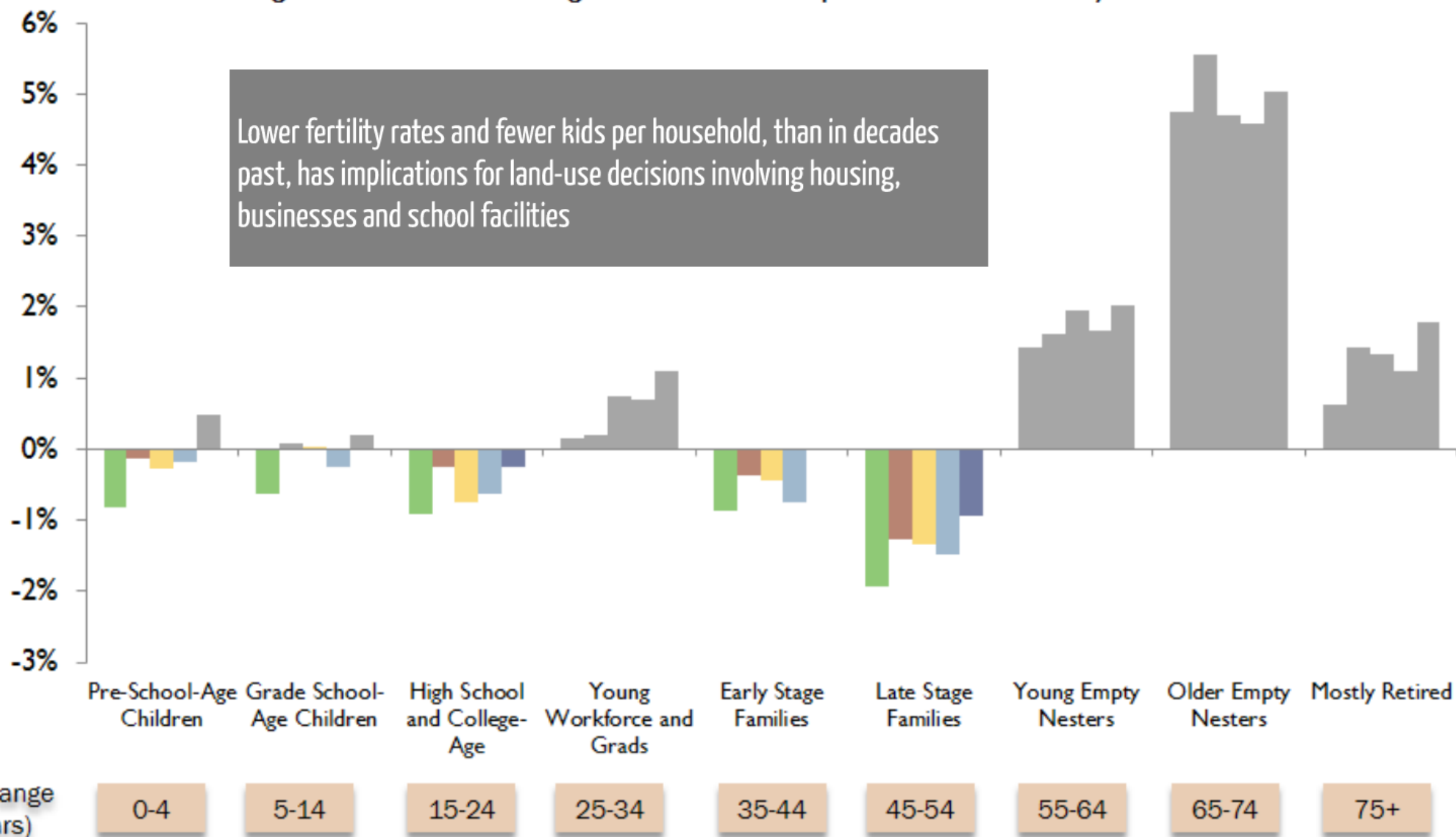
## Age Cohort Changes by Annualized Percentage Change, 2010-2018

■ Pittsburgh MSA
 ■ Harrisburg MSA
 ■ Philadelphia MSA
 ■ Pennsylvania
 ■ United States



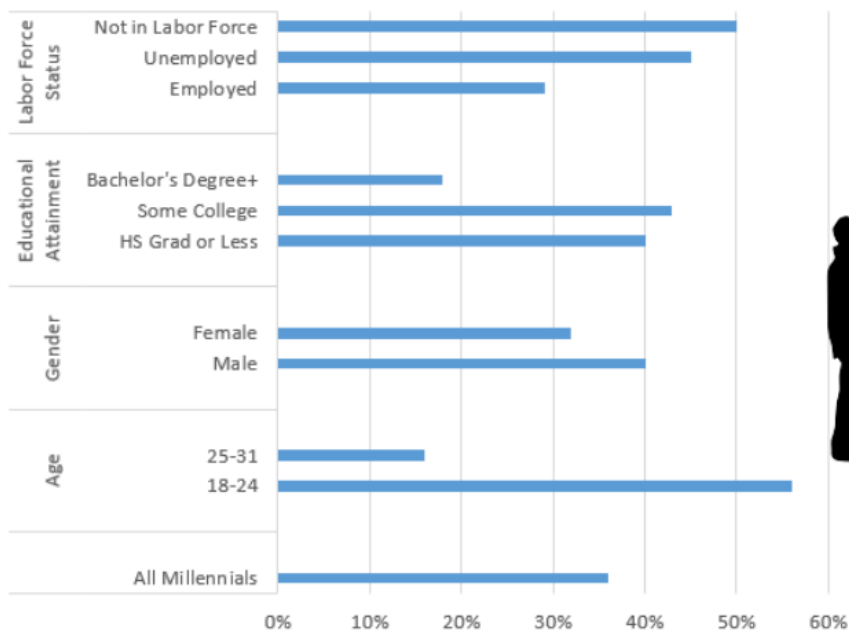
## Age Cohort Changes by Annualized Percentage Change, 2010-2018

Pittsburgh MSA Harrisburg MSA Philadelphia MSA Pennsylvania United States



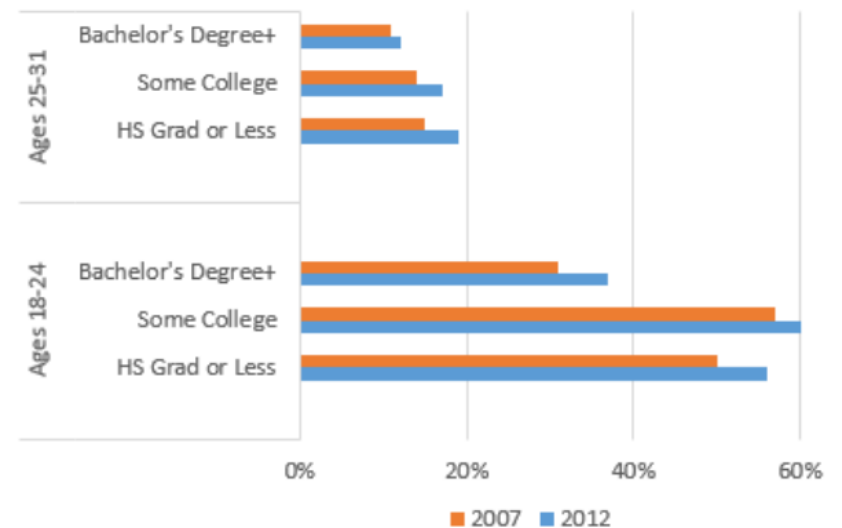
## Millennials Living at Home (2012)

Percent of adults age 18 to 31 living at the home of their parents



## Increase in Living at Home Concentrated among Less-educated Young Adults (2007 and 2012)

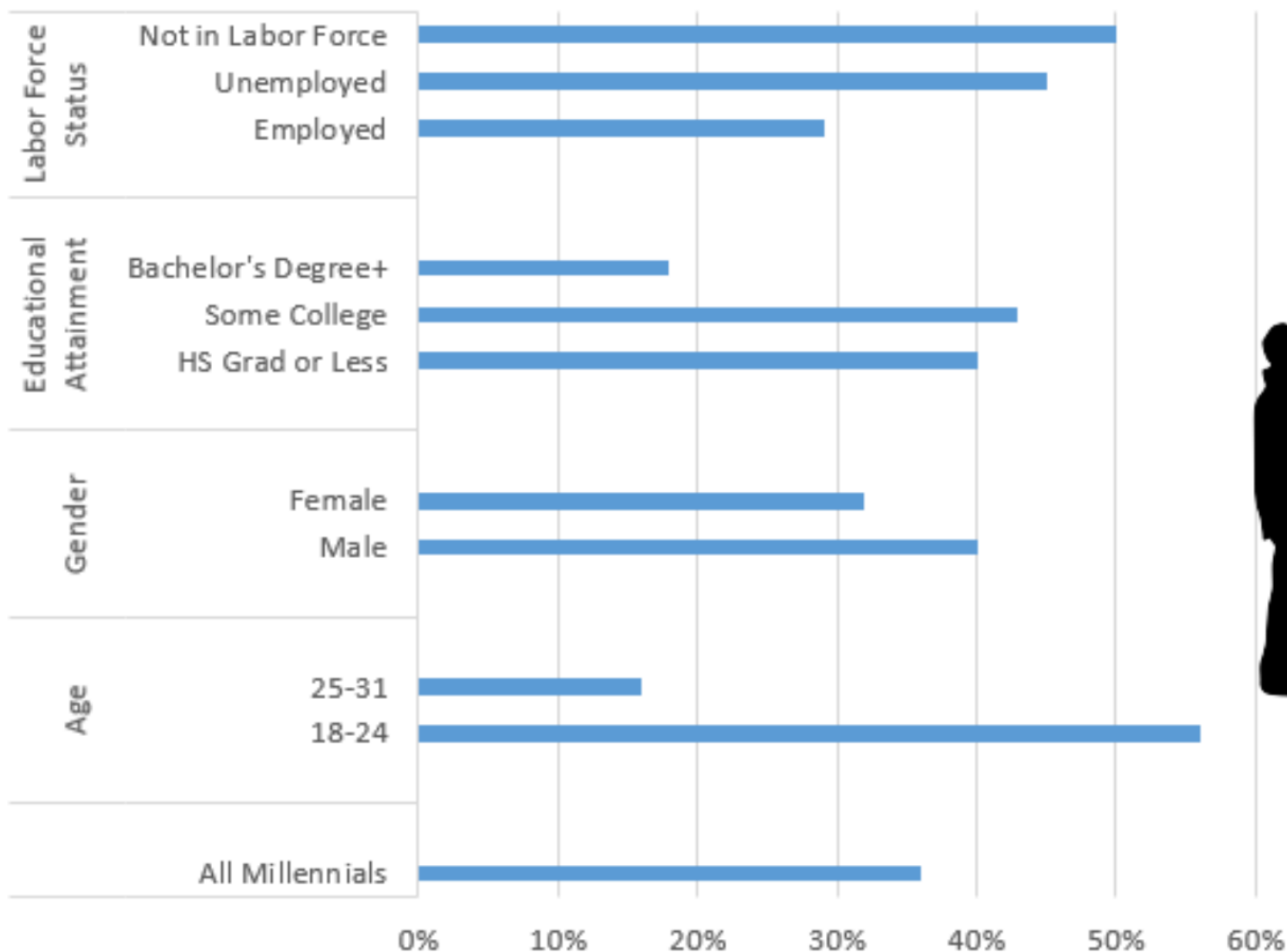
Percent living at home of parents(s)





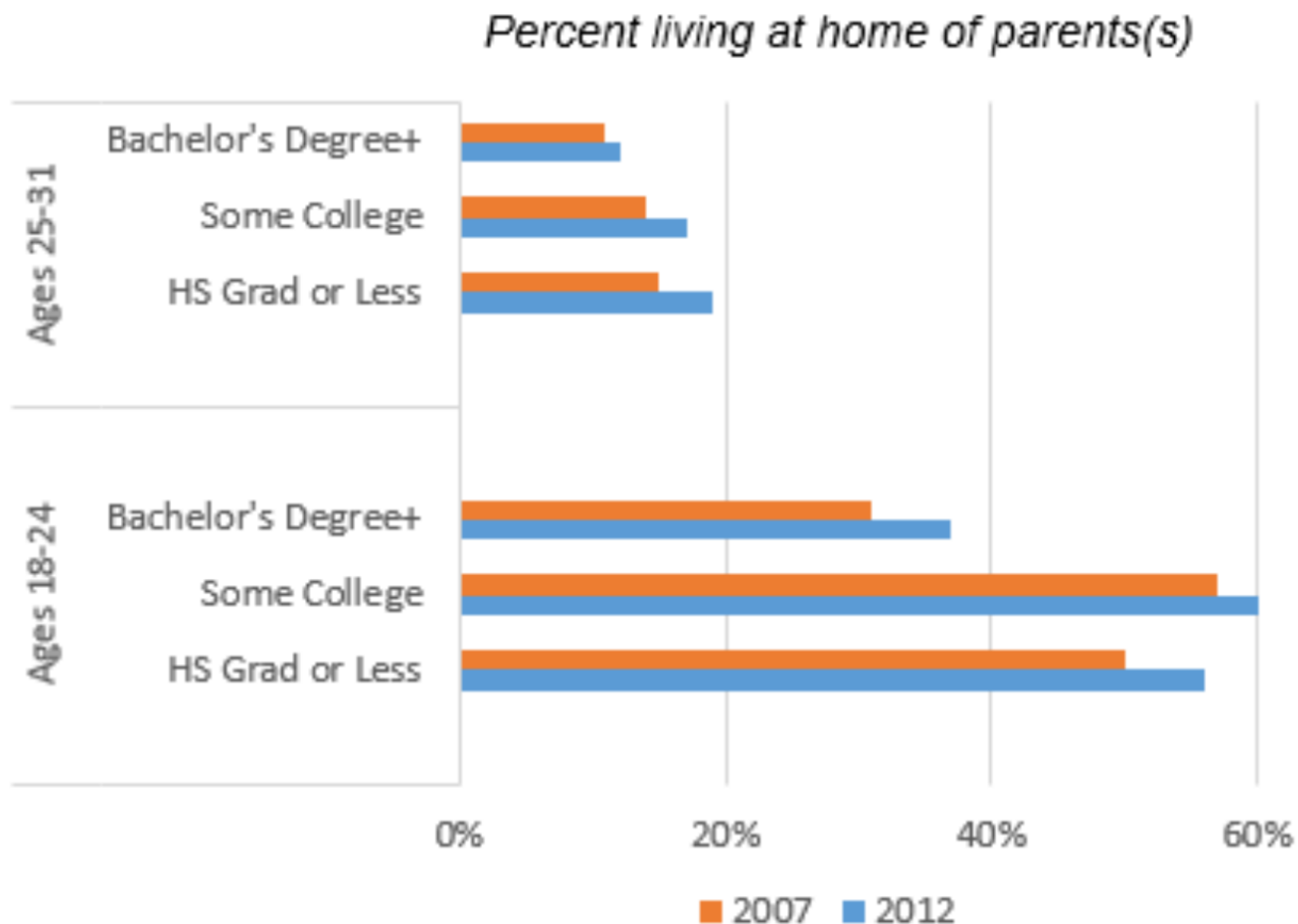
# Millennials Living at Home (2012)

*Percent of adults age 18 to 31 living at the home of their parents*



Source: Pew Research Center. 2012

# Increase in Living at Home Concentrated among Less-educated Young Adults (2007 and 2012)



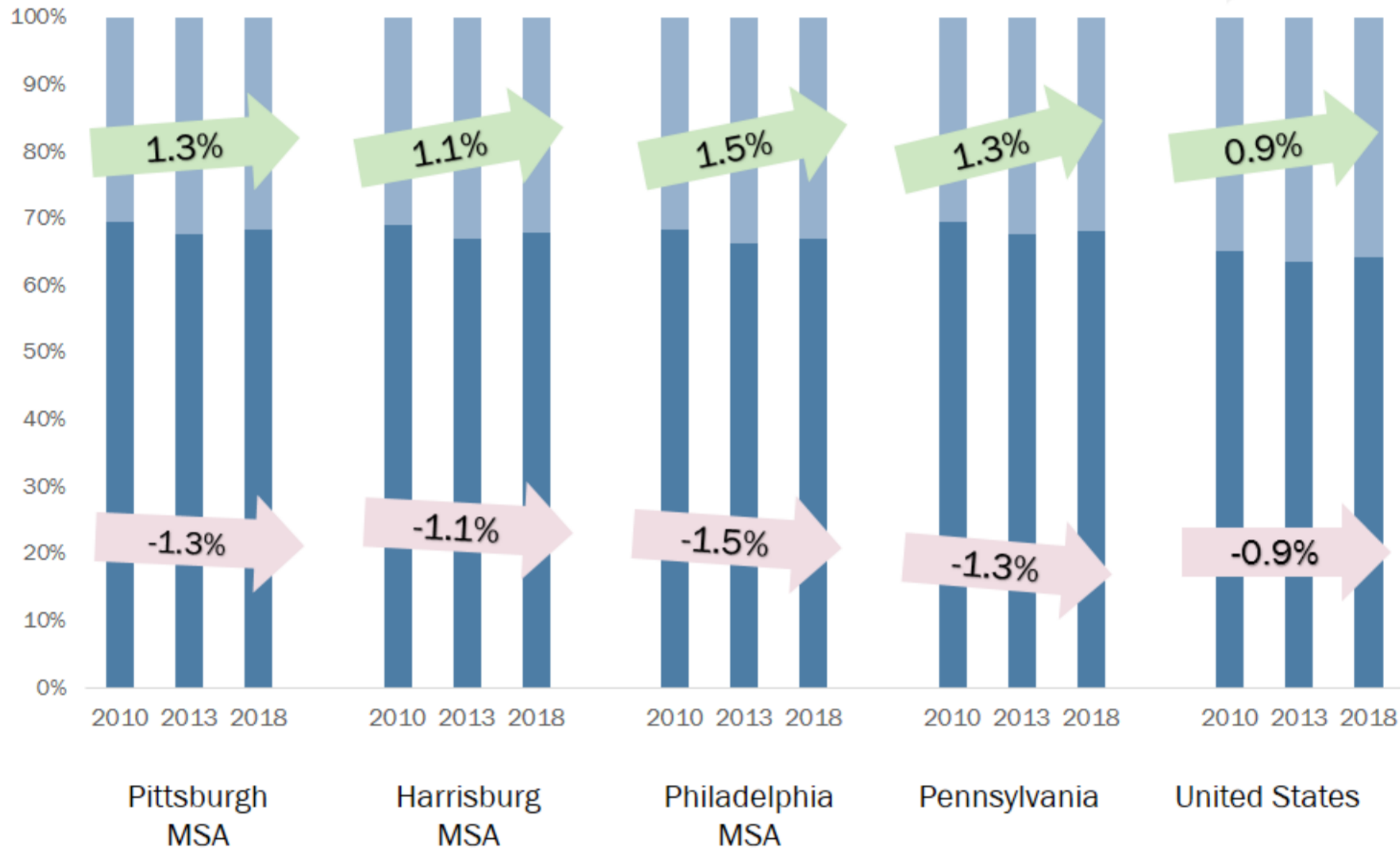


## Housing Tenure by Geography, 2010-2018

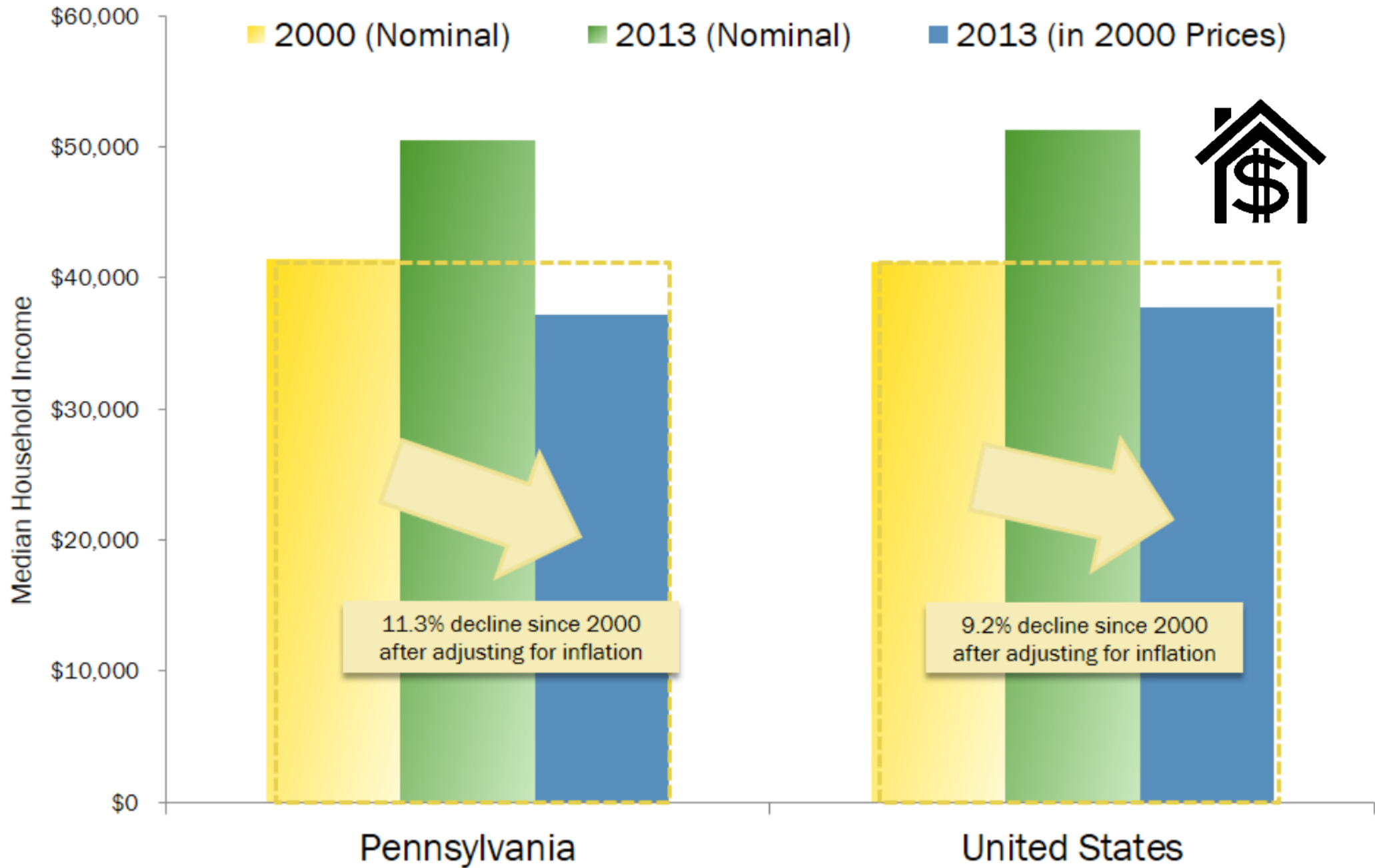
Owner-Occupied

Renter-Occupied

% Change

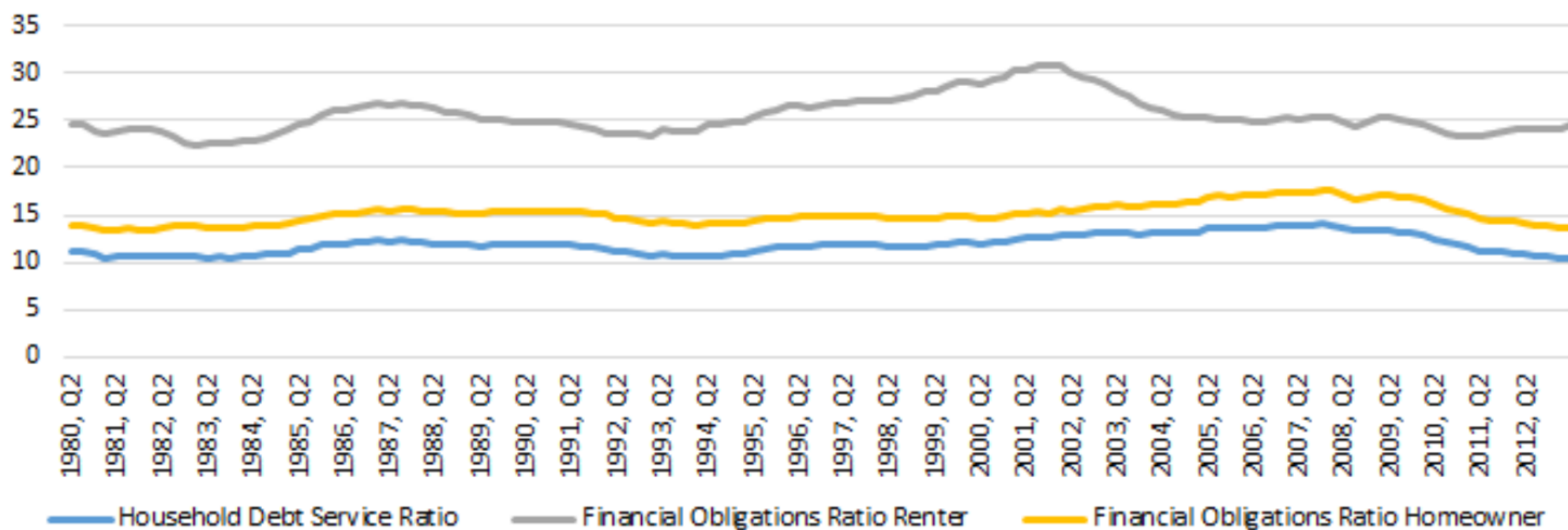


## Median Household Income Comparison



In short, consumers, who represent nearly 70-percent of U.S. Gross Domestic Product, are all but tapped out financially.

## Household Debt Service and Financial Obligations Ratios



Source: Federal Reserve, 2013.





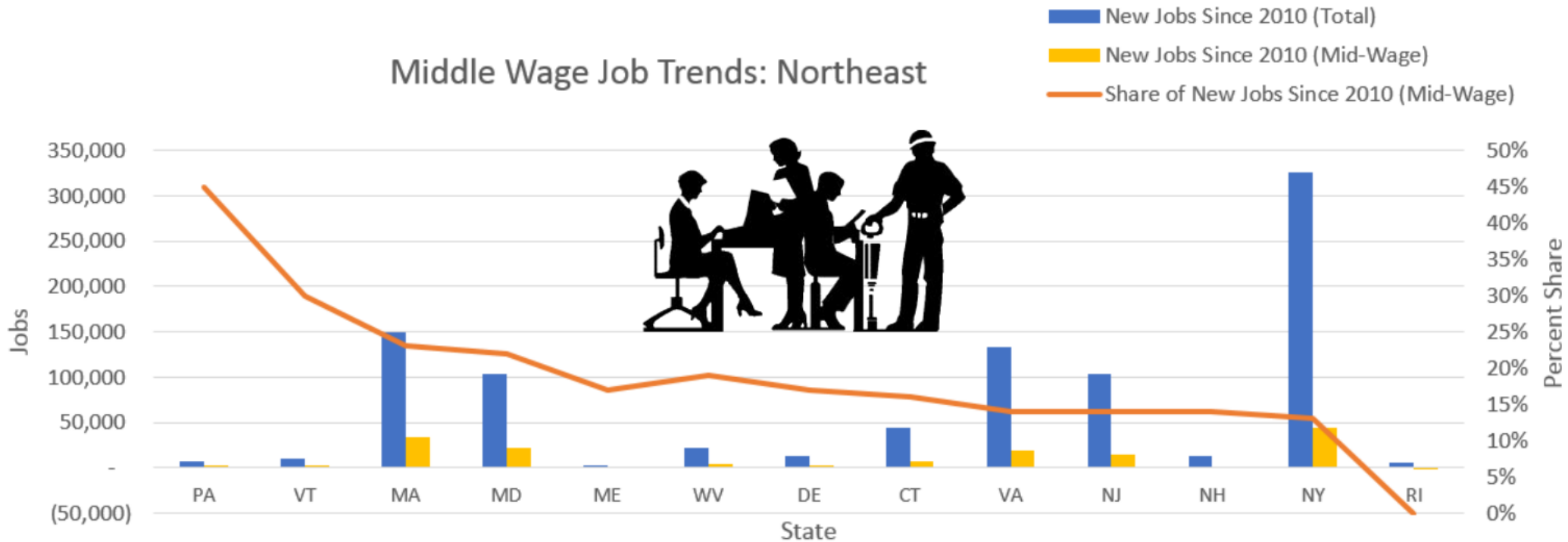
- Labor Force
- Top Industries
- Average Wage
- Growth Trends

# Jobs

# Job Trends

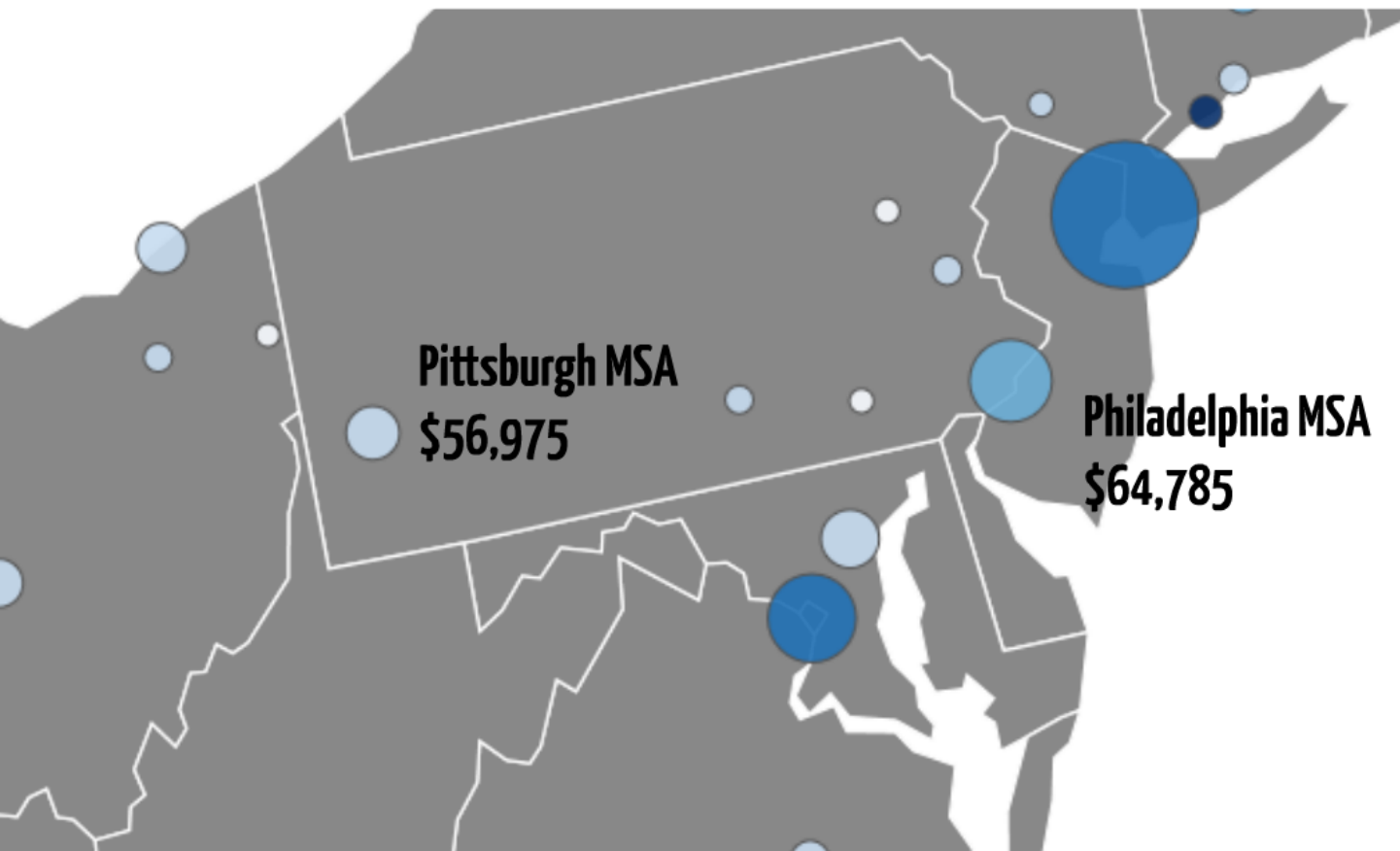
From 2010 to 2013, Pennsylvania gained approximately 7,600 new jobs, of which approximately 45 percent (3,400 jobs) were considered mid wage jobs-- the highest percent share for all northeastern states.

## Middle Wage Job Trends: Northeast



Source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker

## Average Earnings per Job (2013)



Data source: QCEW Employees, Non-QCEW Employees & Self-Employed - EMSI 2013.3 Class of Worker

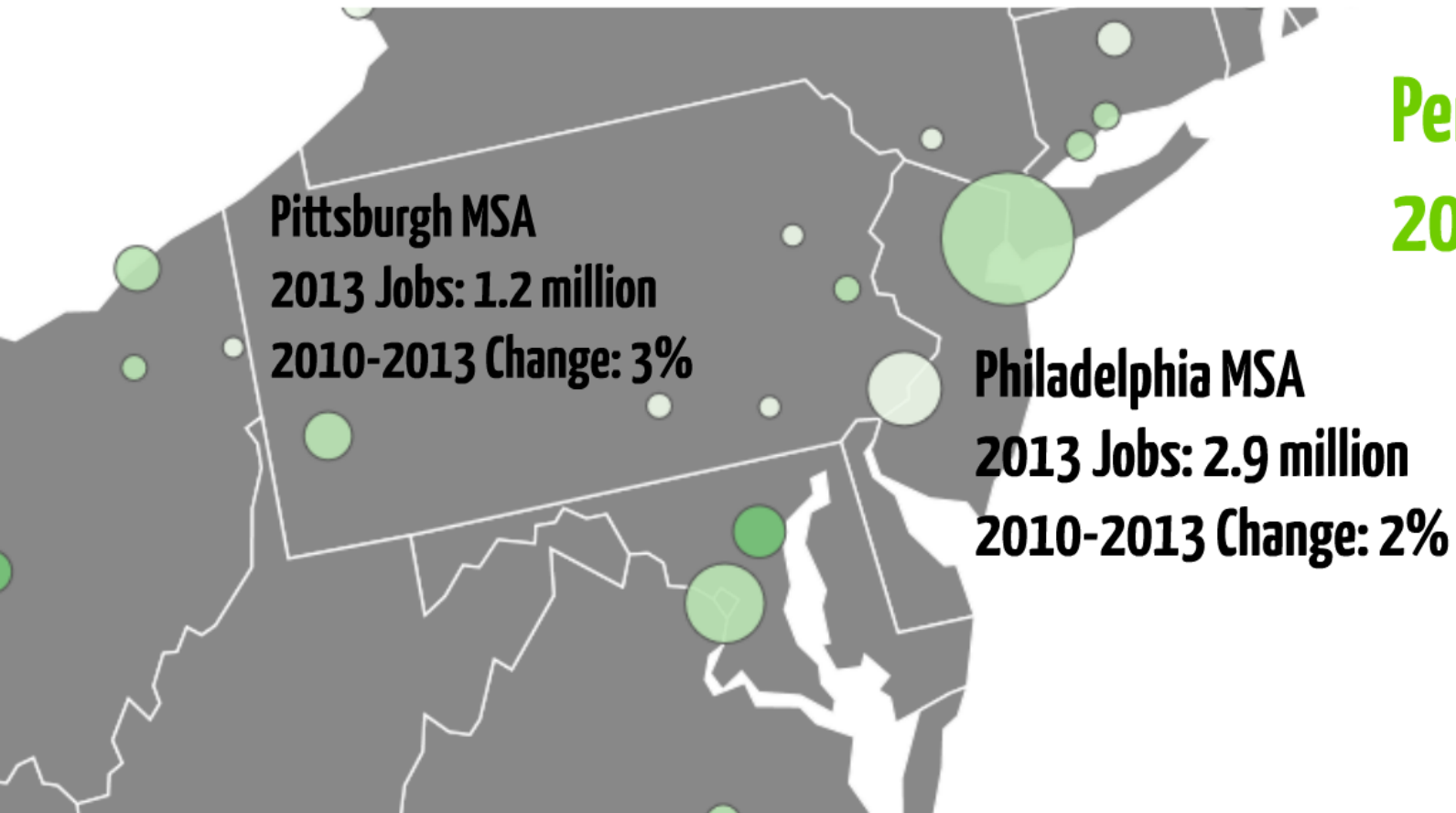
### AVERAGE EARNINGS PER JOB (2013)



### JOBS 2013



## Percentage Change 2010-2013



Data source: QCEW Employees,  
Non-QCEW Employees & Self-  
Employed - EMSI 2013.3 Class of  
Worker

% CHANGE 2010 - 2013



0

12

JOB'S 2013



211,928

9,251,962

The background of the slide is a blurred map showing green spaces and grey lines representing roads or rivers. Overlaid on the left side of the map is a solid blue silhouette of a city skyline with several buildings of varying heights.

# Housing

## Housing Trends

- Location (urban vs suburban, proximity to amenities)
- Size (bedrooms, sq.ft.)
- Type
- Tenure

# Life-Style Oriented and Inter-Generational

“Seniors of today, especially the Boomers, do not want to be isolated.

Baby Boomers at Home in Trendy Urban Condos





# Millennials Don't Want Your House

Young adults are averse to taking on more debt; experts say they could become 'career renters.'





## Smaller is Better

More U.S. cities are embracing tiny apartments to house the boom in single residents.



# Hispanics to Shape Future Housing Demand

## Major Reason to Buy a Home

56

Percent of Hispanics  
consider buying a  
home a symbol  
of success

VS.

Percent of  
All Americans

32

66

Percent of Hispanics  
buy a home to be  
closer to work, family,  
and friends.

VS.

55

Percent of  
all Americans



## The Rise of Walkable Urban Places

The next real estate cycle will be defined by the rise of Walkable Urban Places (WalkUPs) and the fall of sprawl development.

(Christopher Leinberger, Center for Real Estate and Urban Analysis)

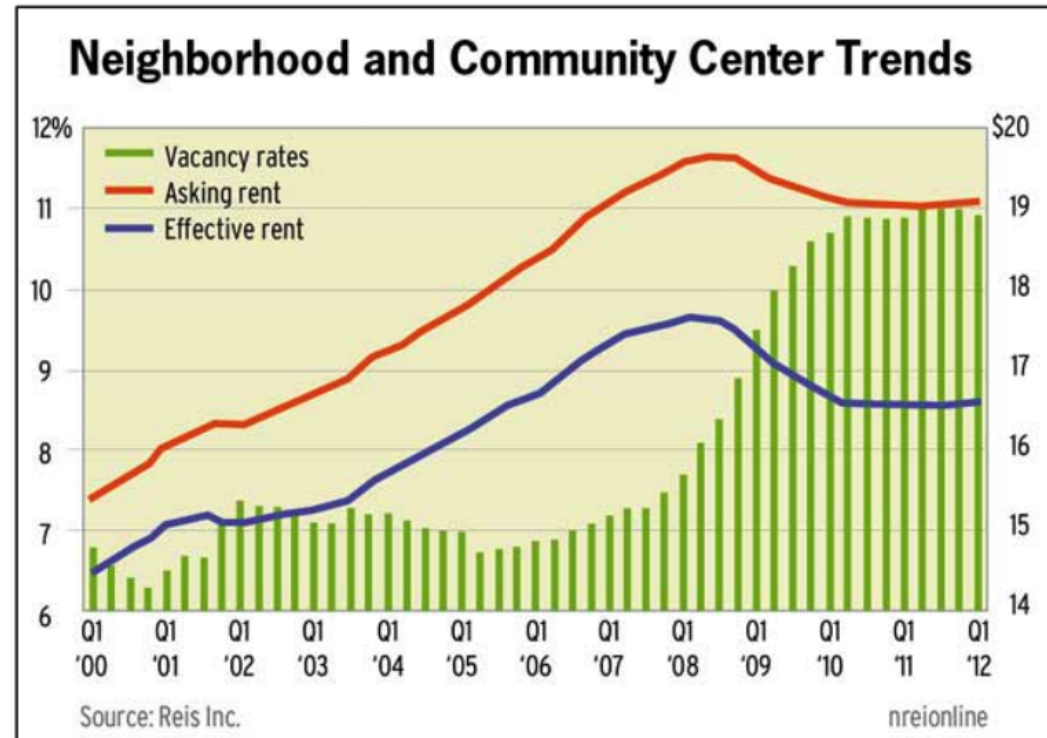
The background of the slide features silhouettes of a woman, a child, and a stroller against a blue sky. At the bottom, there is a horizontal strip showing a map of a city area with green spaces and roads.

# Retail

- Consumer expenditures
- Vacancy rates and rents
- Trends by Type (regional vs neighborhood)
- Cultural preferences

# The Death of the American Shopping Mall

"This declining retailer health of American malls and shopping centers in the form of very high vacancy rates and sluggish rents is an indicator that supply exceeds demand..."



## Purchase Power and Preferences

Hispanic households have purchase preferences that influence shopping habits for housing, and goods and services.

- Focus on family-oriented events
- Early adopters of technology and social media for shopping and entertainment
- Cook more frequently at home



Source: Univision, 2013



4WARD  
PLANNING<sup>TM</sup>



Economic

**So what?**



Social

Fiscal

Environmental



# Residential Land Use Implications

- Suburban areas need to allow for mixed-income, inter-generational housing near urban amenities means allowing for infill opportunities at higher densities (in-law suites)
- Urban areas need to permit for higher density, smaller housing options (micro-units)

"The future of American planning and public policy will be geared to meeting the needs of households without children."

-Arthur C. Nelson, Reshaping Metropolitan America, 2013.



# Retail-Led Development is a Thing of the Past

- Many retail shopping centers and regional malls will need to be repurposed.
- Zoning needs to permit for a mixed of uses within retail centers.
- In suburban communities obsolescent shopping centers could become new town centers.



# Pay Attention to Technology!

Rise of technology's role in business means less office space per worker.

Heard of "Show Rooming?"