What's driving all this change?
Socio-demographics

Mark Bradley, RSG
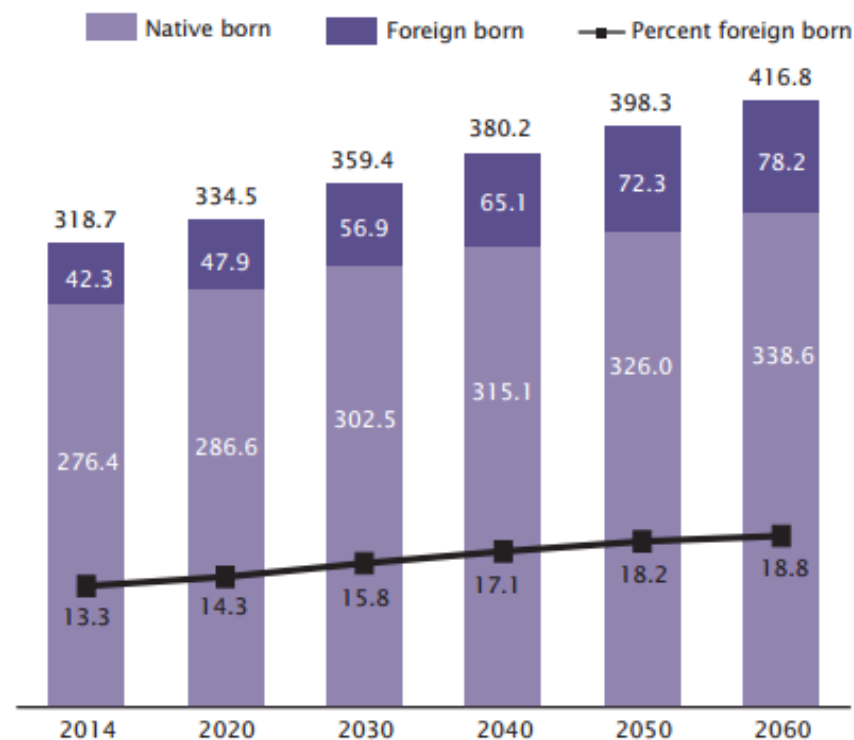
The Next 100 Million

Trends, Uncertainties

- US population growing at higher rate than rest of world's developed nations

- For transportation planning, national totals are not that interesting…

- Which sectors will be growing? (age, employment, income, etc.)

- Who will be living where?

U.S. Population by Nativity: 2014 to 2060
(Population in millions)

Legend: Native born | Foreign born | Percent foreign born

Year	Total	Foreign born	Native born	Percent foreign born
2014	318.7	42.3	276.4	13.3
2020	334.5	47.9	286.6	14.3
2030	359.4	56.9	302.5	15.8
2040	380.2	65.1	315.1	17.1
2050	398.3	72.3	326.0	18.2
2060	416.8	78.2	338.6	18.8

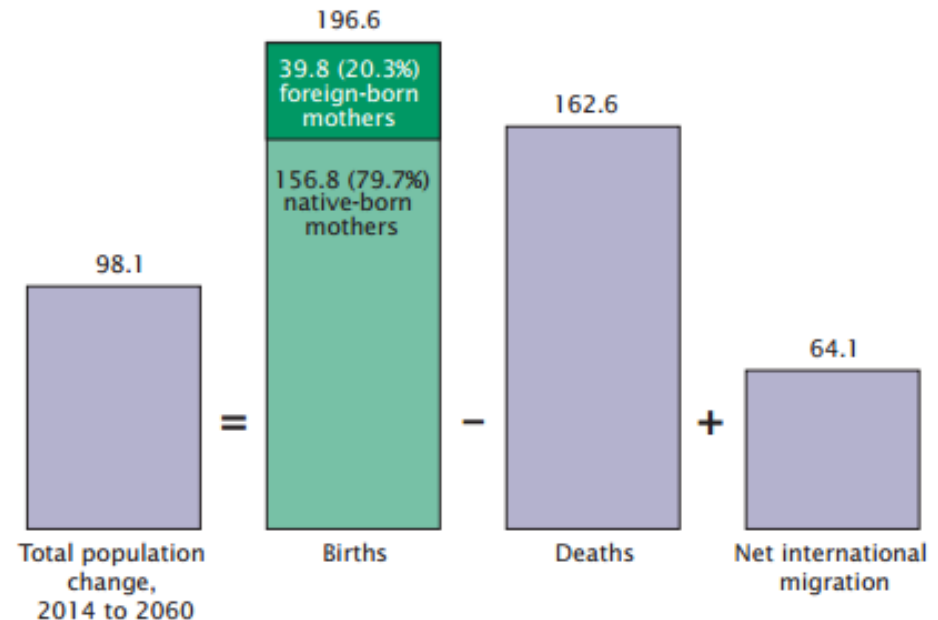Source: U.S. Census Bureau, 2014 National Projections.

Sources of population growth

Trends, Uncertainties

- Projected growth....
  - one third "natural",
  - two thirds from net international migration

- But, immigration rates depend on a lot of things....
  - National economies
  - Climate change
  - Geopolitics

Numeric Change in Population and Components of Population Change: 2014–2060
(In millions)

196.6

39.8 (20.3%) foreign-born mothers

156.8 (79.7%) native-born mothers

162.6

98.1

64.1

= − +

Total population change, 2014 to 2060 | Births | Deaths | Net international migration
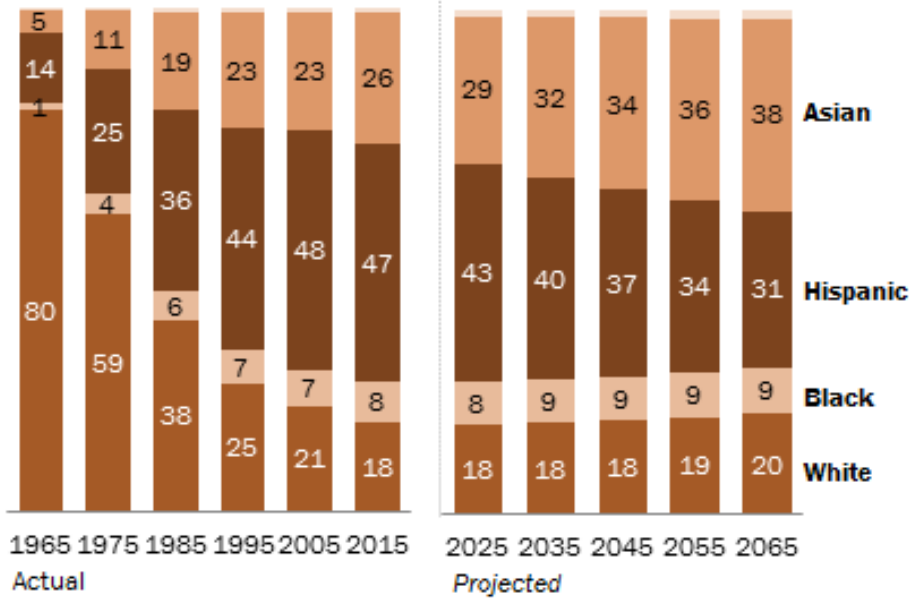
Source: U.S. Census Bureau, 2014 National Projections.

What will the immigrant population look like?

FIGURE 5

Asians Projected to Become the Largest Immigrant Group, Surpassing Hispanics

% of immigrant population

1965 1975 1985 1995 2005 2015
Actual

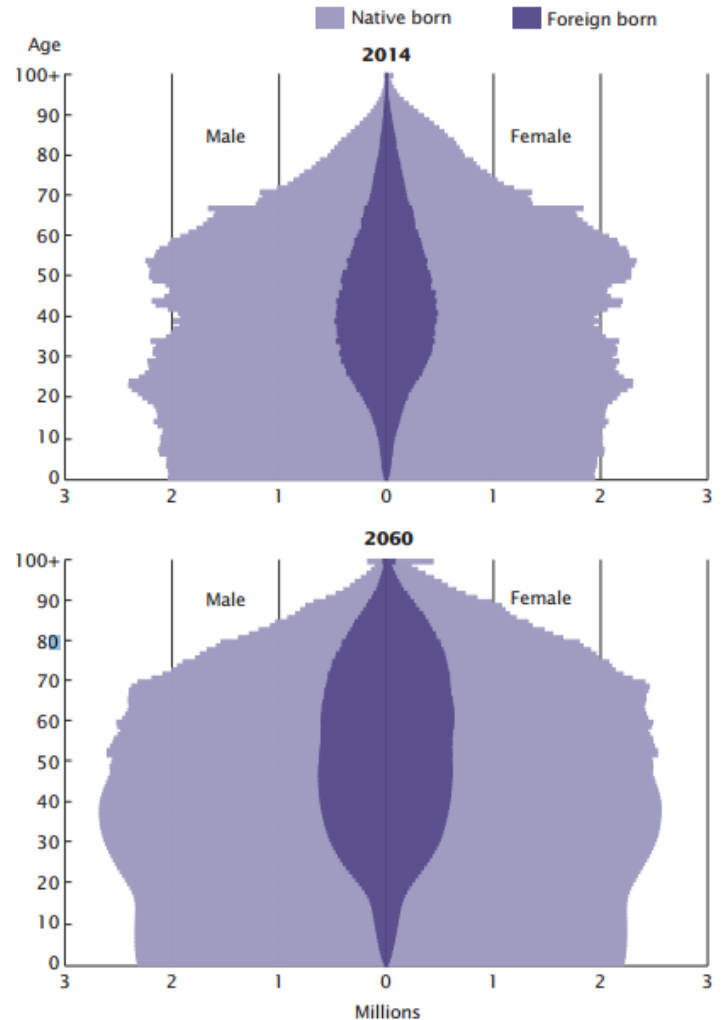2025 2035 2045 2055 2065
Projected

Note: Whites, blacks and Asians include only single-race non-Hispanics. Asians include Pacific Islanders. Hispanics are of any race. Other races shown but not labeled.

Source: Pew Research Center estimates for 1965-2015 based on adjusted census data; Pew Research Center projections for 2025-2065
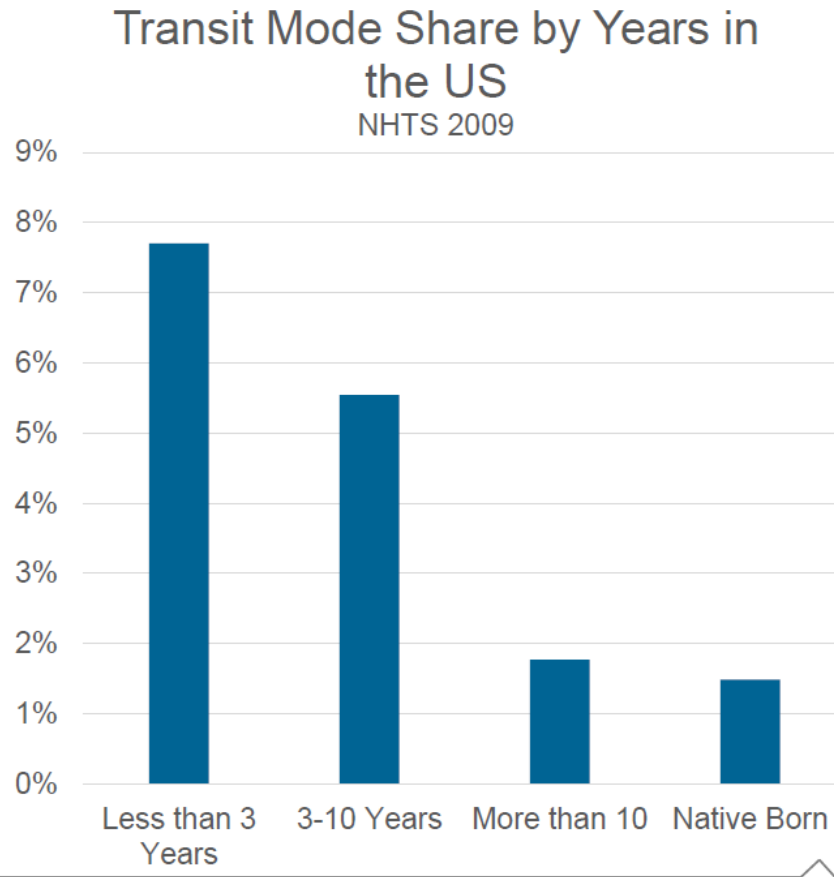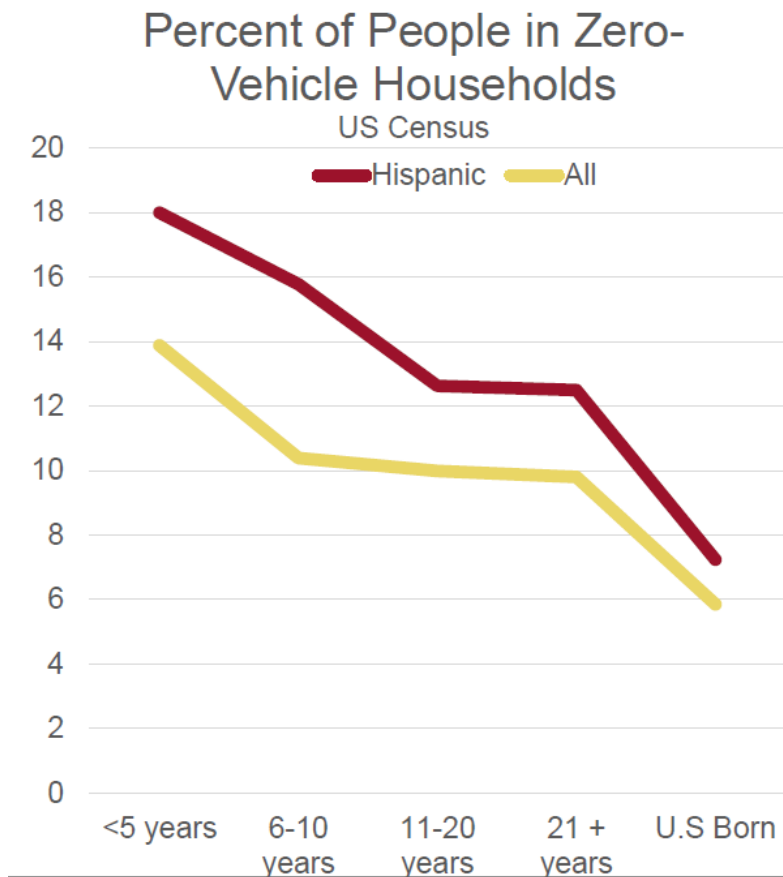
PEW RESEARCH CENTER

Age and Sex Structure of the Population by Nativity: 2014 and 2060

Source: U.S. Census Bureau, 2014 National Projections.

New immigrants are less likely to own a vehicle and more likely to use transit. "Acculturation" appears to occur within a decade or two:


Percent of People in Zero-Vehicle Households
US Census
— Hispanic — All

Transit Mode Share by Years in the US
NHTS 2009

"Browning" of America

Trends, Uncertainties

- White, non-Hispanic share of US population declining
- Majority of America's children are of color

- Varies a great deal by region

- Influenced by immigration / emigration (highly uncertain), also birth and death rates of existing residents (less uncertain)

The changing face of America, 1965–2065

% of the total population
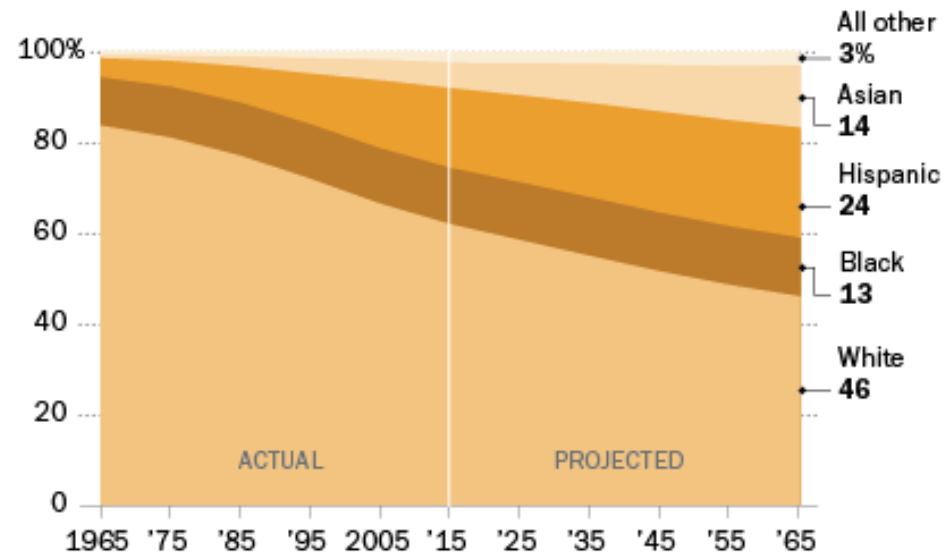
Note: Whites, blacks and Asians include only single-race non-Hispanics; Asians include Pacific Islanders. Hispanics can be of any race.
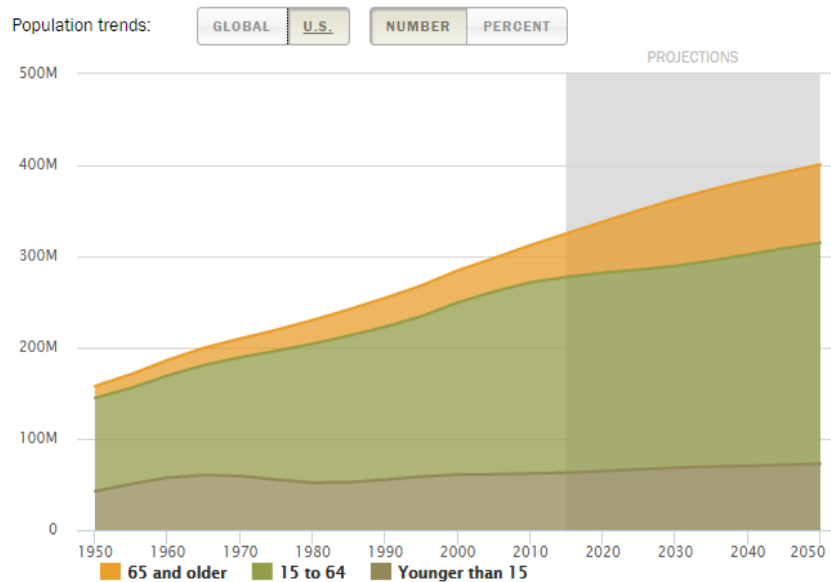Source: Pew Research Center 2015 report, "Modern Immigration Wave Brings 59 Million to US, Driving Population Growth and Change Through 2065"

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"Graying" of America
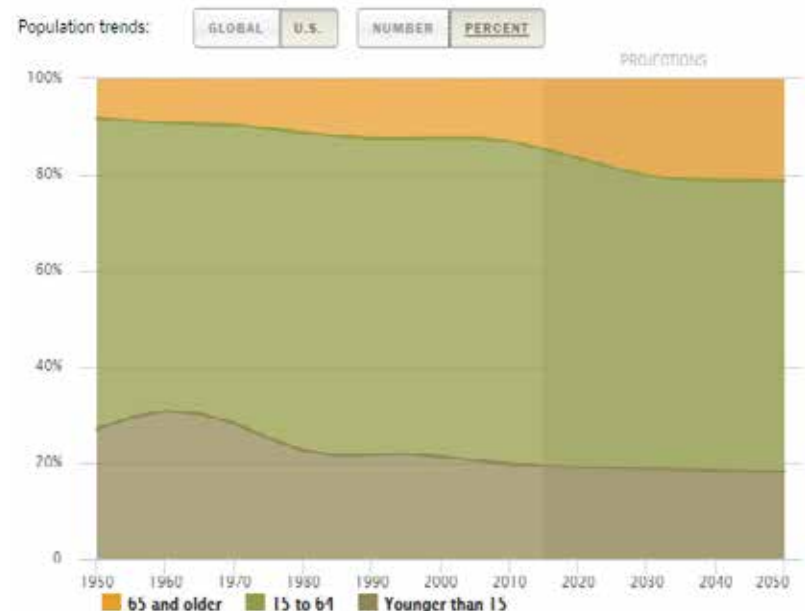
Trends, Uncertainties

- Significant increase in population age 65+ due to Baby Boomers
- Levels off, until Millennials hit 65?

Source: United Nations, Department of Economic and Social Affairs, World Population Prospects: 2012 Revision, June 2013

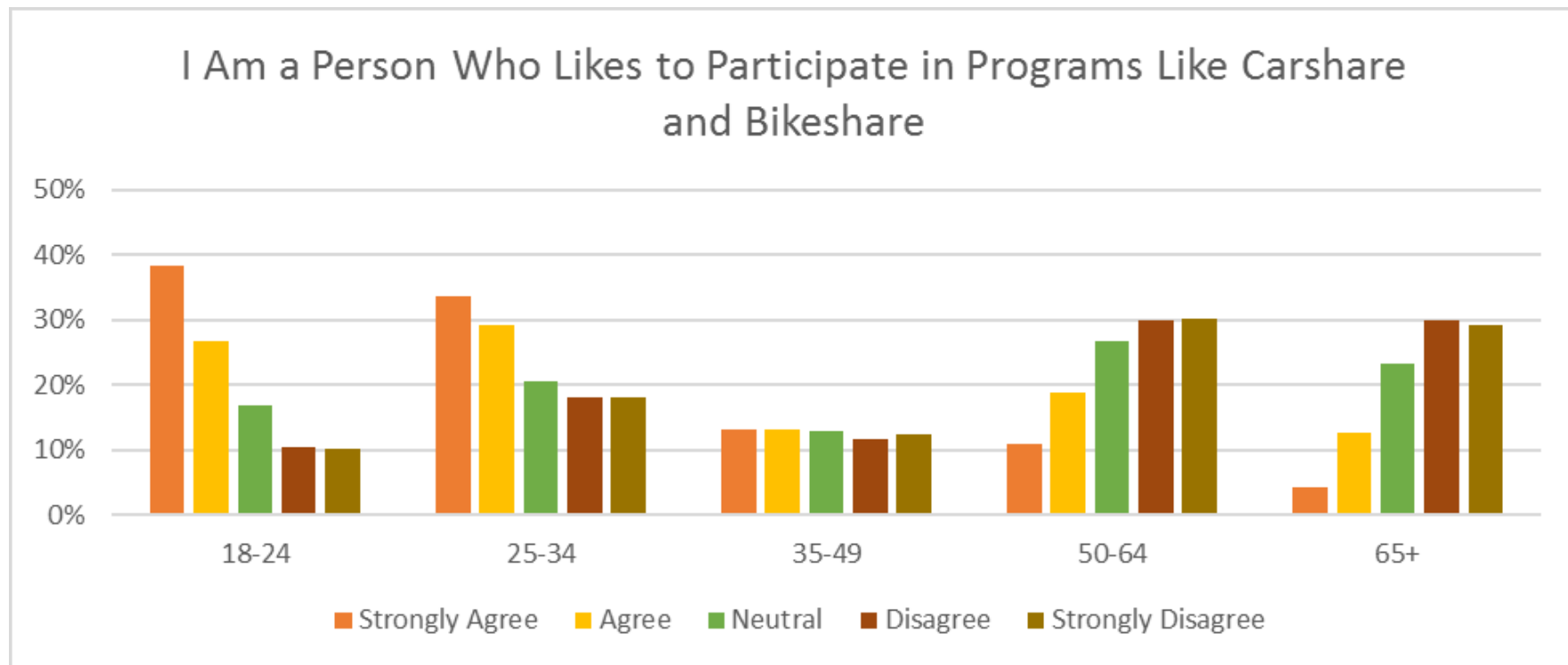Source: United Nations, Department of Economic and Social Affairs, World Population Prospects: 2012 Revision, June 2013

Attitude toward car and bike sharing are very different by age group

I Am a Person Who Likes to Participate in Programs Like Carshare and Bikeshare

Legend: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree

Source: RSG survey data

Generation C 😎

Trends, Uncertainties

- Gen C = hyperlinked
- Spend entire lives connected with digital devices
- What will be the influences on travel behavior?

Changing American Workforce

Trends, Uncertainties

- Labor-force participation rate declining, but average retirement age increasing
- Workforce is growing older and more diverse
- Future trends will depend on the supply of jobs and who will have the needed skills

- Could vary a great deal by region

Civilian Labor Force by Age *(Millions)*
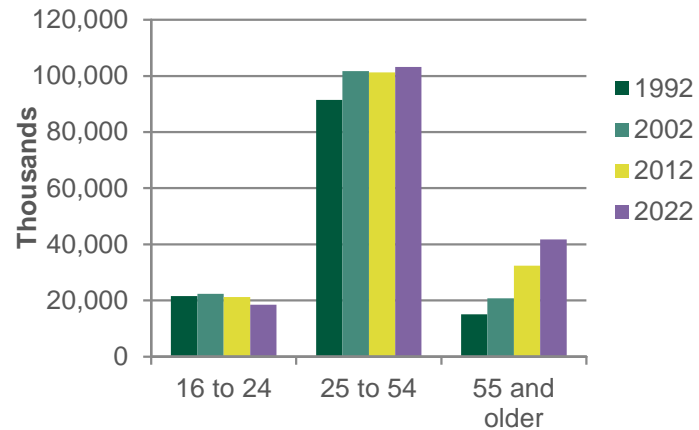

Source: BLS, Monthly Labor Review, December 2013; Toossi, M. December 2013. "Labor Force Projections to 2022: The Labor Force Participation Rate Continues to Fall." Monthly Labor Review. U.S. Department of Labor, Bureau of Labor Statistics. http://www.bls.gov/opub/mlr/2013/article/pdf/labor-force-projections-to-2022-the-labor-force-participation-rate-continues-to-fall.pdf

Trends Toward Larger Metro Areas

- Metro regions with population > 5 million have grown most
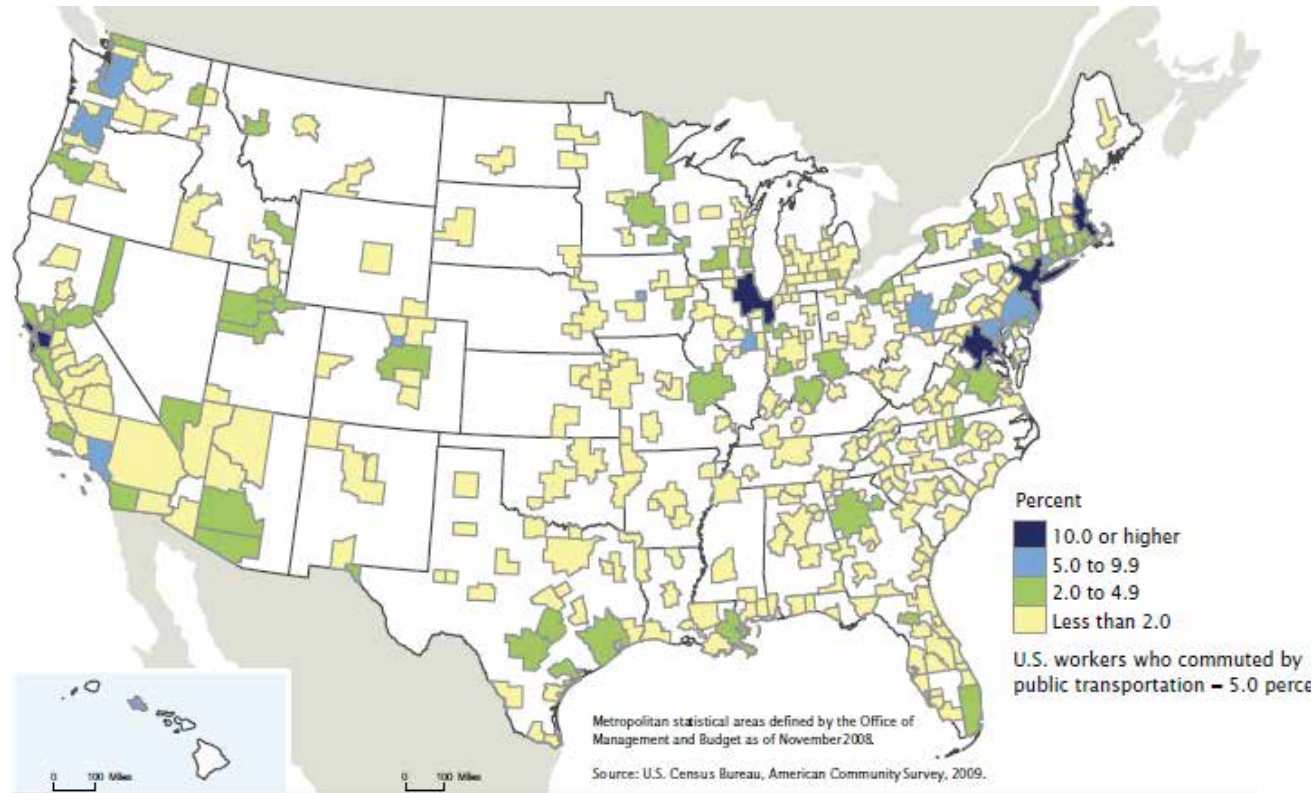- Top 22 areas (2.5 million +) account for 44% of total population
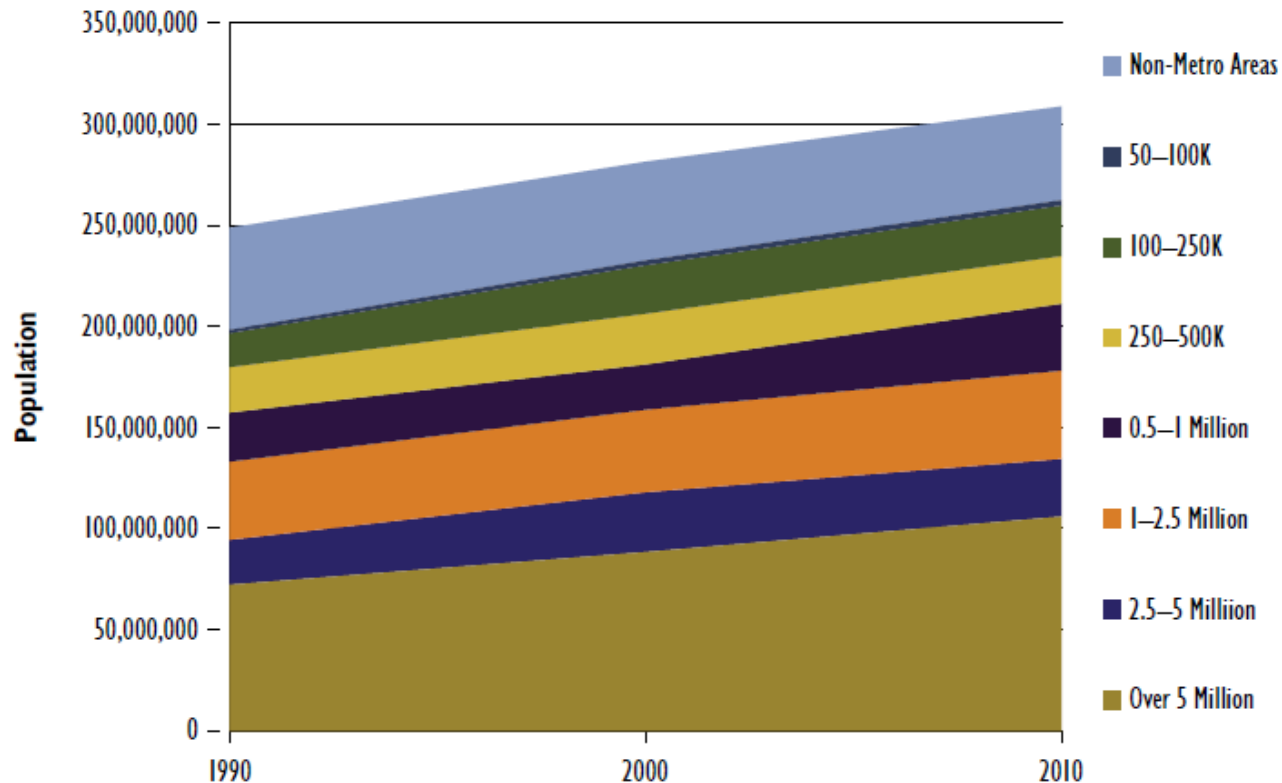
Source: US Census Bureau, taken from Commuting in America IV Brief 4

Highest growth rates in Southeast and Southwest

Region	# Metro Areas	Population (mil)		Population (mil)		Transit Work Share
		1990	2010	Increase	%	
Northeast + Mid-Atlantic	6	41.5	50.7	9.2	22%	12%
Southeast	9	14.7	26.1	11.4	**78%**	**2%**
Midwest	11	30.2	36	5.8	19%	3%
Southwest	8	17.4	28	10.6	**61%**	**3%**
Northwest + West	6	28.4	38.5	10.1	36%	7%
All	40	132.2	179.3	47.1	36%	

Percent
- 10.0 or higher
- 5.0 to 9.9
- 2.0 to 4.9
- Less than 2.0

U.S. workers who commuted by public transportation – 5.0 perce[nt]

Metropolitan statistical areas defined by the Office of Management and Budget as of November 2008.

Source: U.S. Census Bureau, American Community Survey, 2009.

Source: US Census Bureau, taken from Commuting in America IV Brief 4, and 2009 ACS

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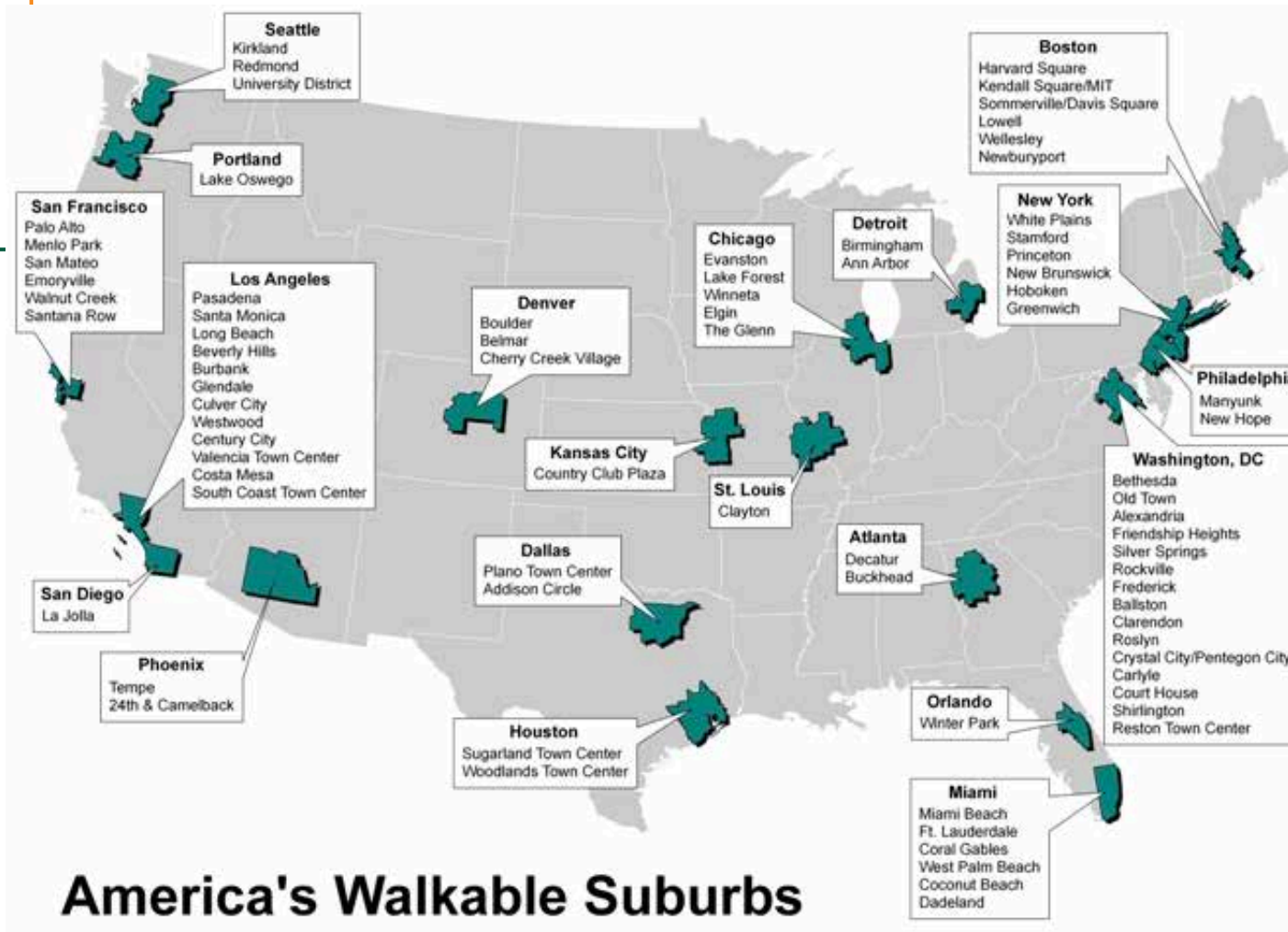
(Sub)urbanization of America

- Metro areas contain 85% of all population (~ 50% in 1950)
- Suburban areas contain about 71% of all Metro population (~25% in 1950)
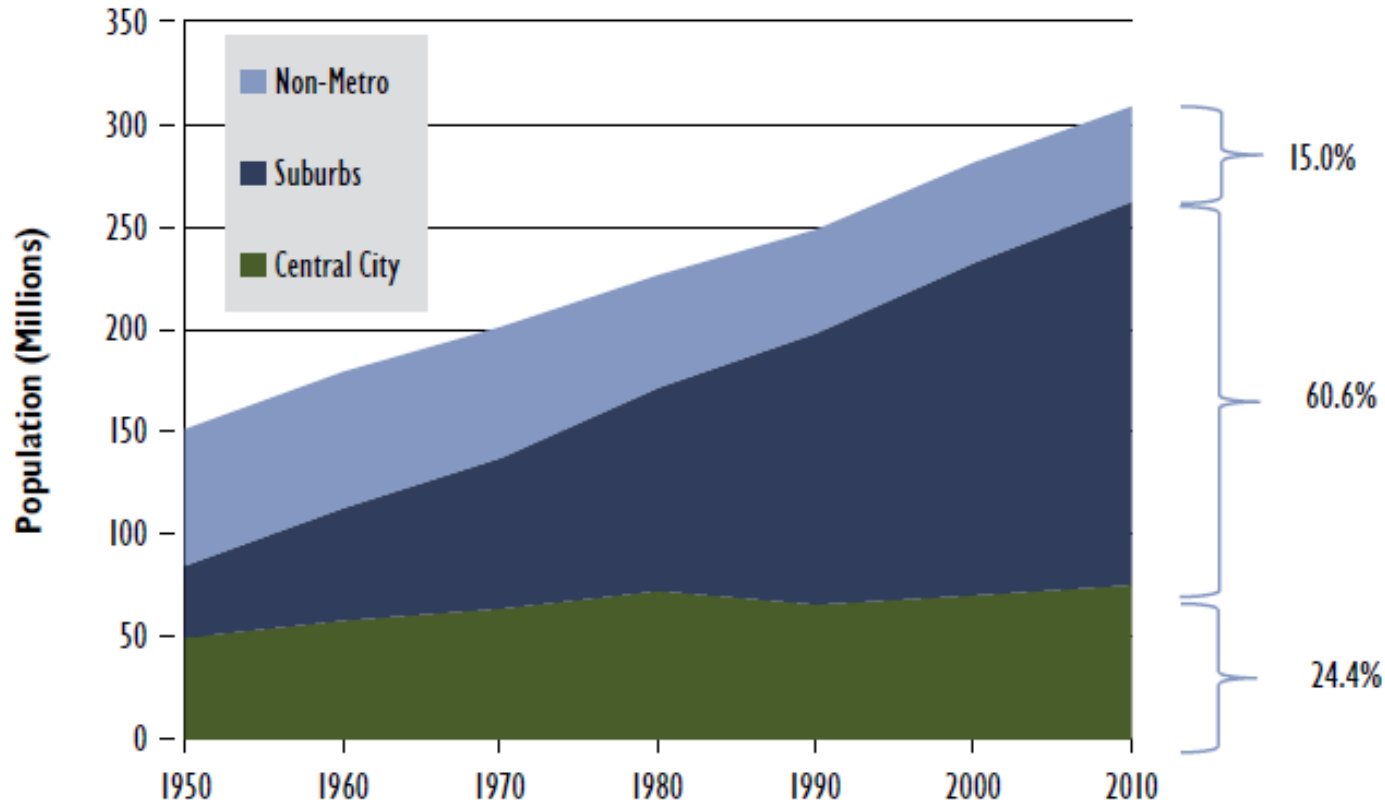
Source: US Census Bureau, taken from Commuting in America IV Brief 4

Blurring City and Suburb

- Both cities and suburbs home to employers and residences

- Inner-ring suburbs having density changes similar to center city

- What will be the demand and supply for different types of neighborhoods?

Seattle
Kirkland
Redmond
University District

Portland
Lake Oswego

San Francisco
Palo Alto
Menlo Park
San Mateo
Emoryville
Walnut Creek
Santana Row

Los Angeles
Pasadena
Santa Monica
Long Beach
Beverly Hills
Burbank
Glendale
Culver City
Westwood
Century City
Valencia Town Center
Costa Mesa
South Coast Town Center

San Diego
La Jolla

Phoenix
Tempe
24th & Camelback

Denver
Boulder
Belmar
Cherry Creek Village

Kansas City
Country Club Plaza

Dallas
Plano Town Center
Addison Circle

Houston
Sugarland Town Center
Woodlands Town Center

St. Louis
Clayton

Chicago
Evanston
Lake Forest
Winneta
Elgin
The Glenn

Detroit
Birmingham
Ann Arbor

Atlanta
Decatur
Buckhead

Orlando
Winter Park

Miami
Miami Beach
Ft. Lauderdale
Coral Gables
West Palm Beach
Coconut Beach
Dadeland

Boston
Harvard Square
Kendall Square/MIT
Sommerville/Davis Square
Lowell
Wellesley
Newburyport

New York
White Plains
Stamford
Princeton
New Brunswick
Hoboken
Greenwich

Philadelphia
Manyunk
New Hope

Washington, DC
Bethesda
Old Town
Alexandria
Friendship Heights
Silver Springs
Rockville
Frederick
Ballston
Clarendon
Roslyn
Crystal City/Pentegon City
Carlyle
Court House
Shirlington
Reston Town Center

America's Walkable Suburbs

Map by Zara Matheson, Martin Prosperity Institute

Data Source:
http://www.brookings.edu/papers/2007/1128_walkableurbanisim_leinberger.aspx

The Distribution of Income

- Around 1980, income growth stopped in the lowest two income quintiles
- Around 2000, income growth stopped in the middle quintile also
- What will these curves look like as we leave the Great Recession behind?
- What will happen in specific regions?

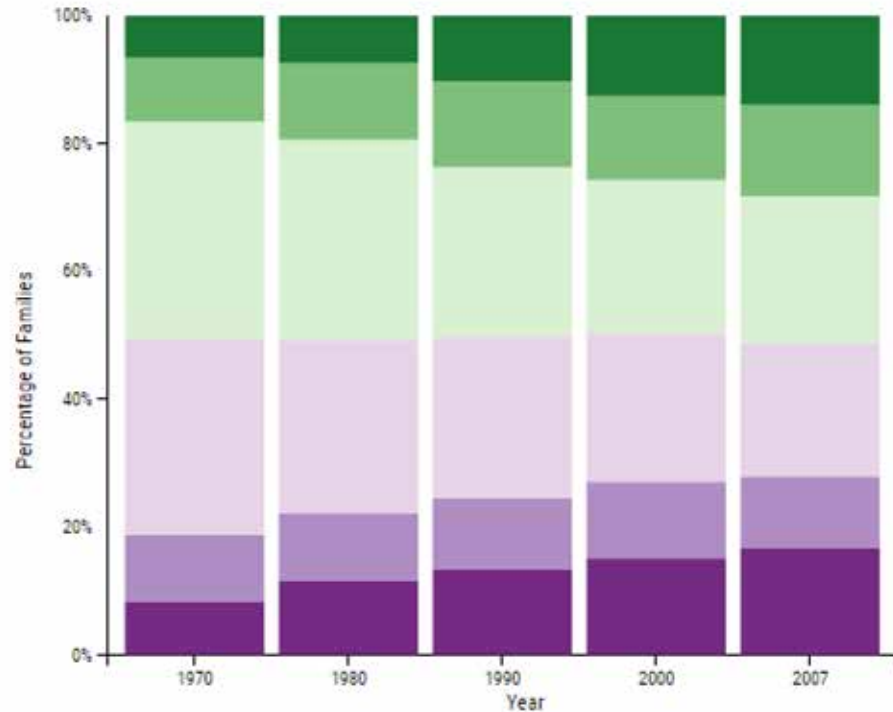Upper Limit of Bottom Family Income Quintile, Upper Limit of Second Family Income Quintile , Upper Limit of Middle Family Income Quintile , Upper Limit of Fourth Family Income Quintile

80th percentile
60th percentile
40th percentile
20th percentile
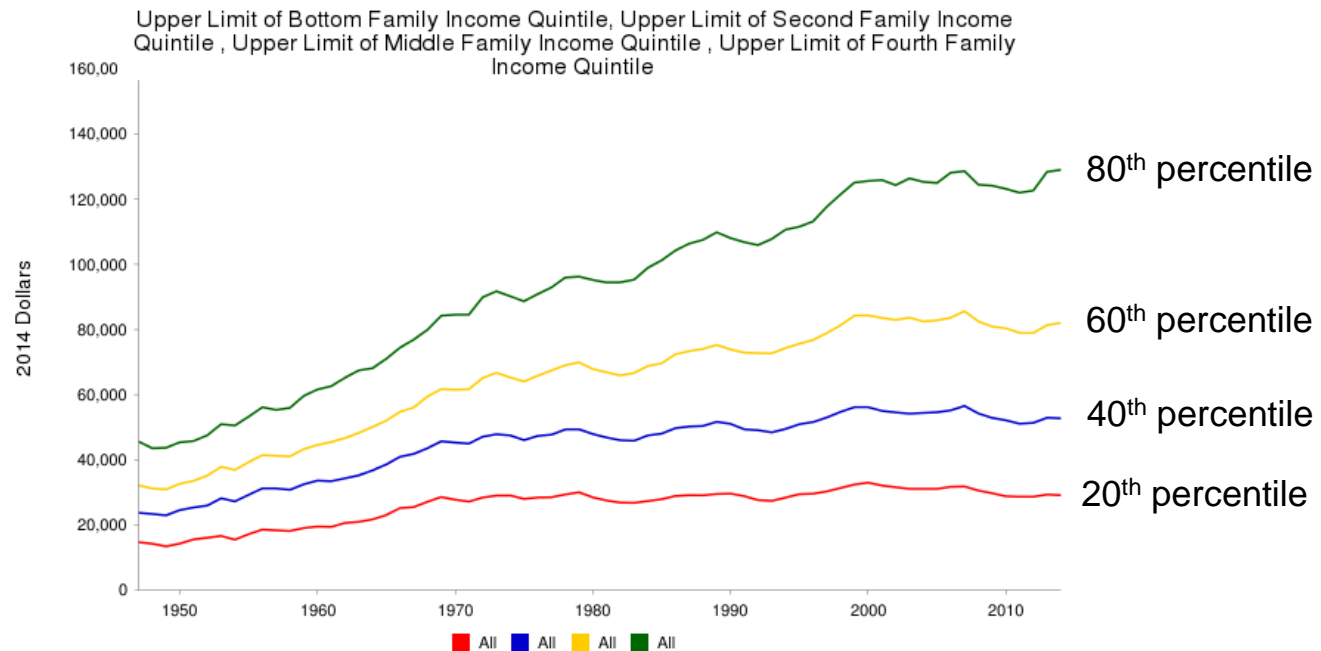
Source: U.S. Census Bureau

Distribution of income by geography…. Increasing segregation, fewer middle-class neighborhoods

Neighborhood Median Income Level

| Poor (<67% of Metro Median) | Low Income (67-80% of Metro Median) | Low-Middle Income (80-100% of Metro Median) | High-Middle Income (100-125% of Metro Median) | High Income (125-150% of Metro Median) | Affluent (150% of Metro Median) |

Percentage of Families Living in High-, Middle-, and Low-Income Neighborhoods

Metropolitan Areas with Population > 500,000, 1970-2007

Increasing segregation by income- Portland

Neighborhood Median Income Level

Poor	Low Income	Low-Middle Income	High-Middle Income	High Income	Affluent
(<67% of Metro Median)	(67-80% of Metro Median)	(80-100% of Metro Median)	(100-125% of Metro Median)	(125-150% of Metro Median)	(150% of Metro Median)

Neighborhood Income Composition
Portland-Vancouver-Beaverton, OR-WA, 1970
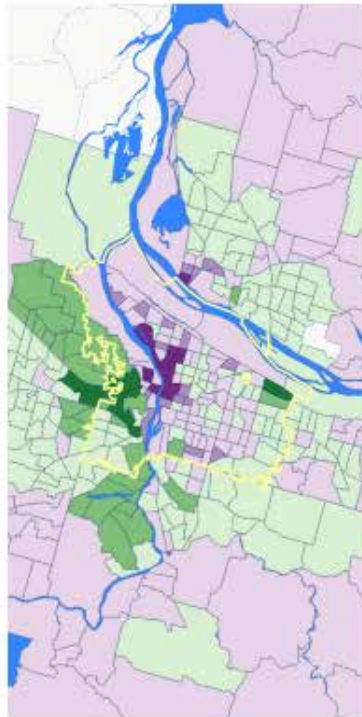
Percentage of Families Living in High-, Middle-, and Low-Income Neighborhoods
Portland-Vancouver-Beaverton, OR-WA 1970-2007
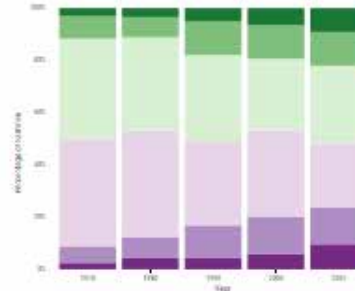
Increasing segregation by income- Portland (2)

Neighborhood Income Compos...
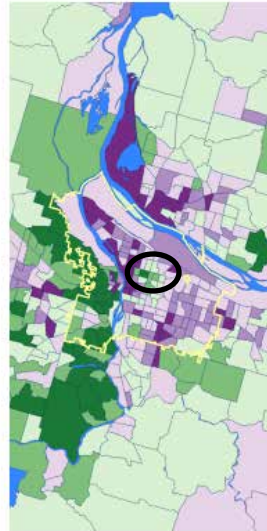Portland-Vancouver-Beaverton,
WA, 1970
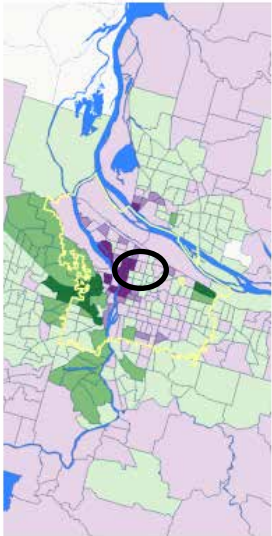
Neighborhood Income Composi...
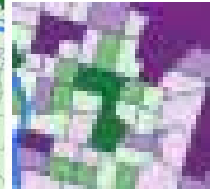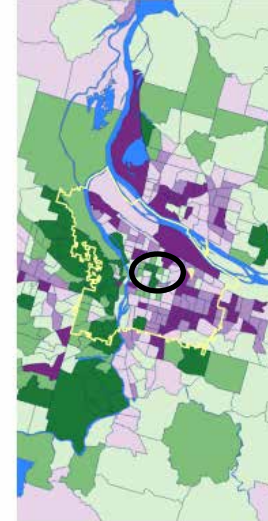Portland-Vancouver-Beaverton, (
WA, 1980
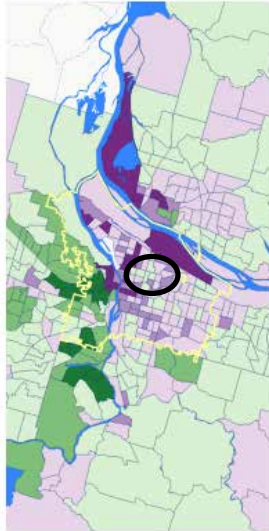
Neighborhood Income Compos...
Portland-Vancouver-Beaverton
WA, 1990

Neighborhood Income Composit...
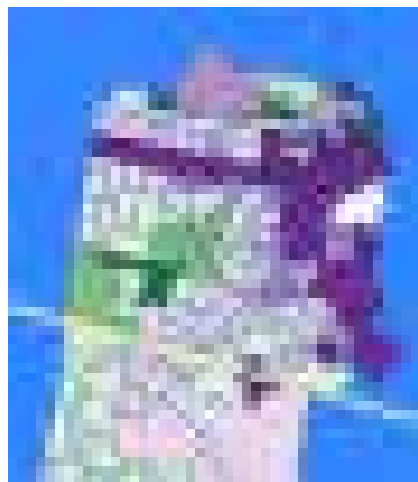Portland-Vancouver-Beaverton, (
WA, 2000

Neighborhood Income Compositio...
Portland-Vancouver-Beaverton, OR
WA, 2007

TRB Scenario Planning Conference 2016

Not only segregation – also gentrification

City of San Francisco

1970

2007

2050?

More recessions?

More segregation?

More gentrification?

Sea level rise?

None of the above?