Reality Check 2050

Envisioning our region's growth

June 4, 2013

ULI Reality Check

A collaborative regional visioning process of the Urban Land Institute

Metro Charlotte is a Great Region

CHANGES
AHEAD

“The best way to predict the future is to create it yourself”

Abraham Lincoln

Regional Visioning

Over the last 15 years, regional visioning has emerged as an important tool in developing regional consensus.

- Envision Utah
- Sacramento Blueprint
- Metropolis Chicago 2020
- Richmond Reality Check

It is about our children

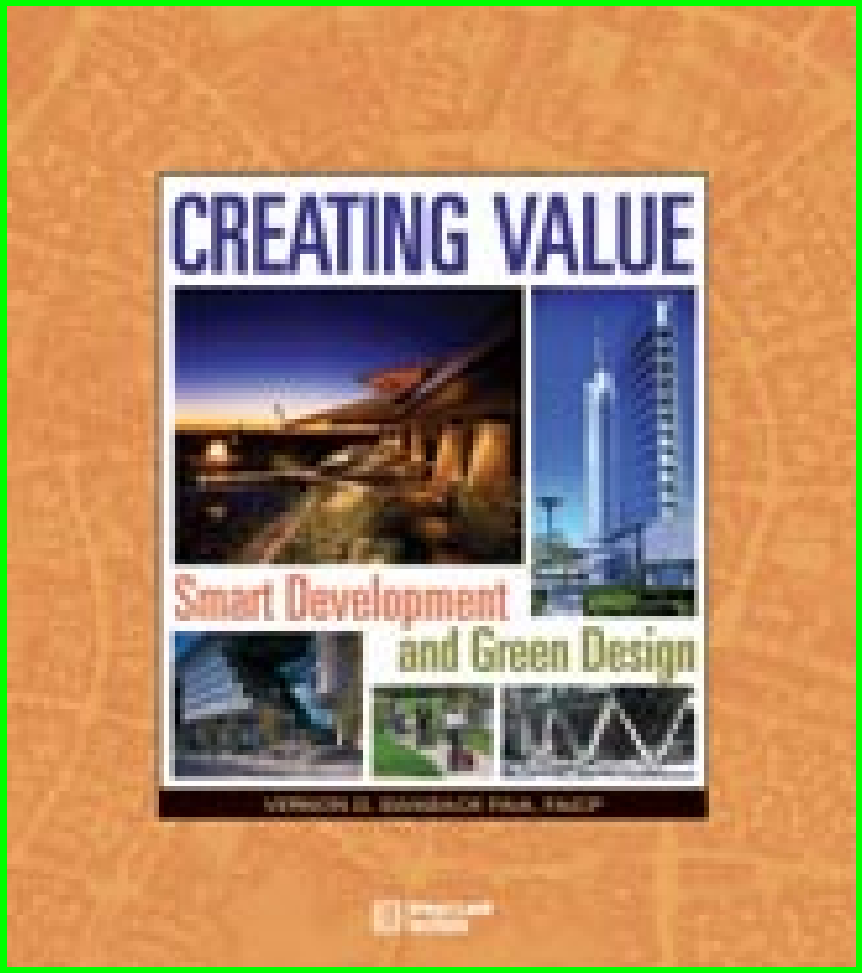
It’s about balance

“Conservation is a state of harmony between man and nature.”

Aldo Leopold

It’s About Win-Win Solutions

- Healthy Environment
- Vigorous Economy
- Vibrant Community



Sustainability = more than technology

- At its most basic, “sustainable” means enduring.

- Sustainable communities are places of enduring value.

Regional Problems Require Regional Solutions

Air Pollution

Traffic Congestion

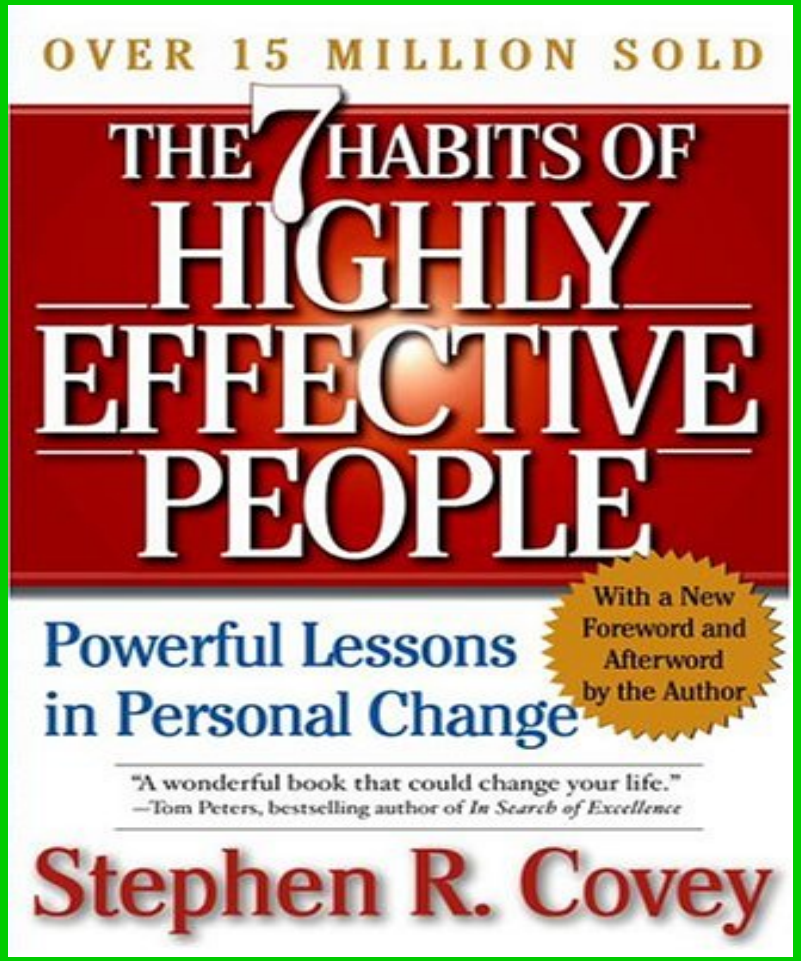
Loss of Green Space

Water Pollution

Keys to Regional Visioning

Working Together

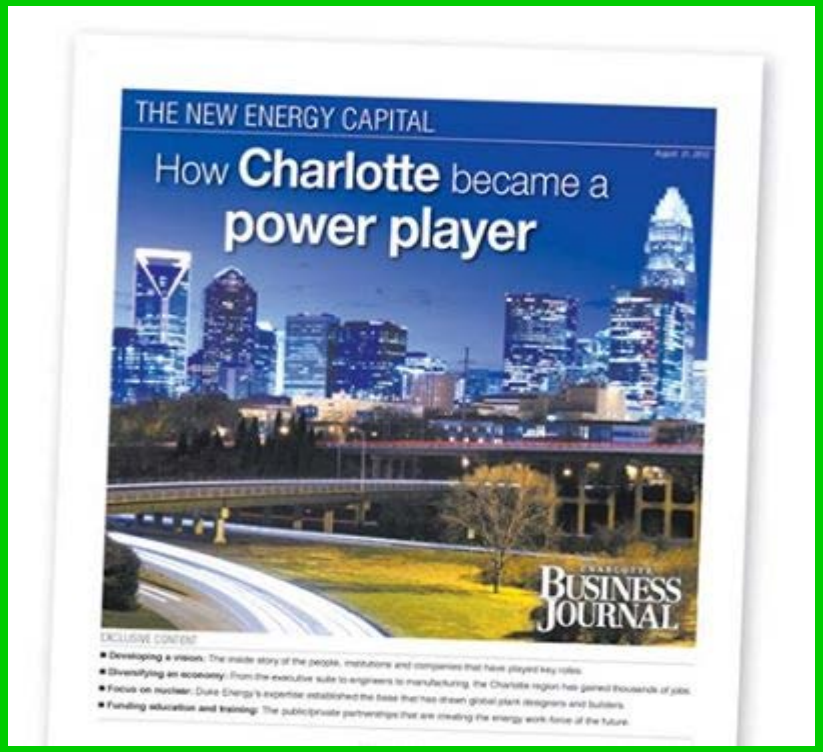
Regional Cooperation



- Begin with the end in mind
- Think win/win
- Seek first to understand and then to be understood

Visioning is About Choices

Should we try to recruit new industry?



Should we try to expand existing businesses?

Visioning is About Choices

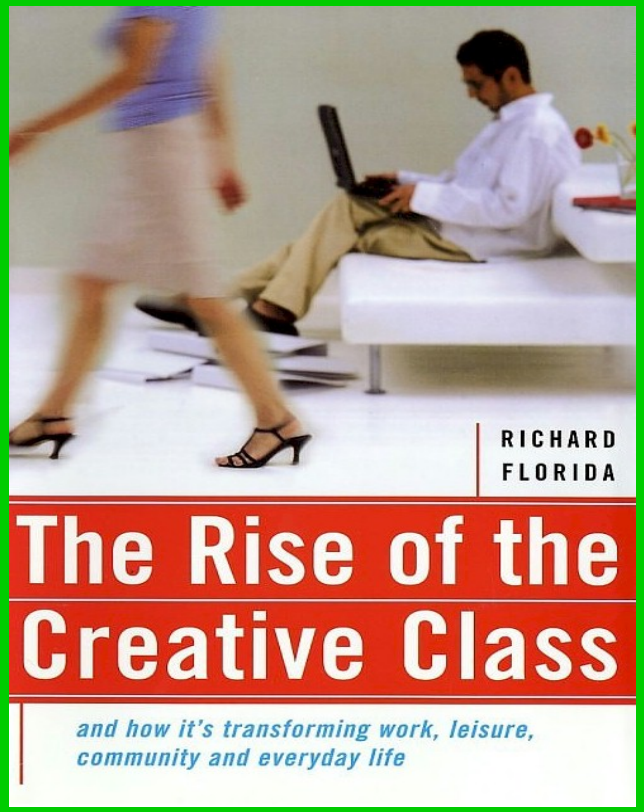
Should we continue to spread out?

Should we grow more compactly?

You can build a region centered around the automobile

You can build a region that provides transportation options & choices

Global Competitiveness

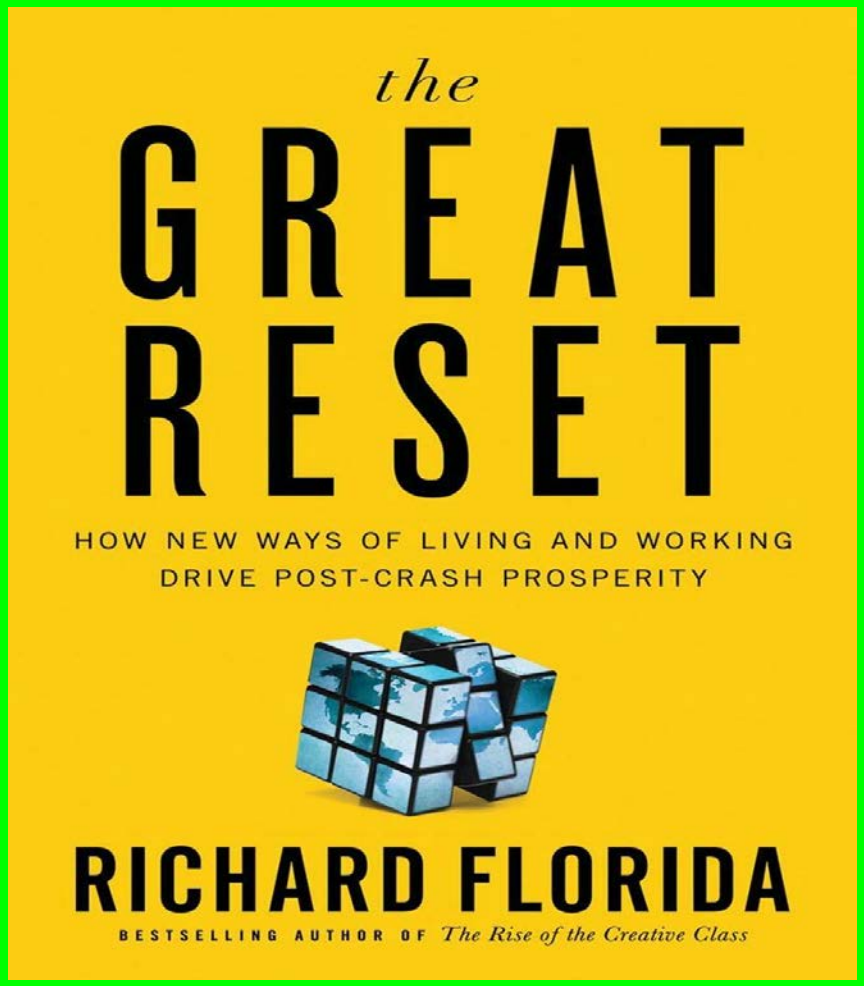


- Regions compete in the new global economy
- Quality of life matters (cool places to live, work and play)
- But so does world class infrastructure
- Mobility, Amenities and Sustainability

Why Visioning Now?

- Economic changes
- Population Growth
- Demographic changes
- Infrastructure Deficit
- New technologies
- Haphazard Land use
- Market Trends
- Changing consumer attitudes

How will the Crash Reshape America?



- "How we live, work, shop and get around will change."
- "Communities that embrace the future will prosper. Those that do not will decline."

Economic Development

20th Century Model

- Public sector leadership
- Shotgun recruitment strategy
- Low cost positioning
- Cheap labor
- Key infrastructure = roads
- Focus on what you don't have
- Driven by transactions

21st Century model

- Public/Private Partnerships
- Laser recruitment strategy
- High value positioning
- Highly trained talent
- Key infrastructure = education
- Focus on what you do have
- Driven by an overall vision

“Communities and regions are in a global competition to attract and retain a talented workforce. Increasingly these talented workers are choosing where they want to live first and figuring out their job situations later.”

CEO’s for Cities, Segmentation Study, 2006

Population Growth

- 100 Million New US Residents by 2050
- 435,000 new Area residents by 2035
- 1 million+ New Units Per Year
- Demographic shifts and Immigration
- Decline of Traditional Households

Demographic Shifts

- Baby Boomers and Retirees – 80 million
- Immigrants – 40 million
- Millennials (18 to 32 year olds) – 85 million
- Single person households - 27 million
- 75 % of American households do not have school age children
- By 2025, 33% of all households will be a single person

Technological Changes

- “The Death of Distance”
- People can do business anywhere
- Most new jobs are in small and medium sized businesses
- Health care & education
- Industrial recruitment is a small part of new economy

Haphazard Land Use

Large Lot Subdivisions

Strip Commercial

Growth Trends Reinforce Driving

Infrastructure Deficit

I-35 Bridge Collapse Minneapolis

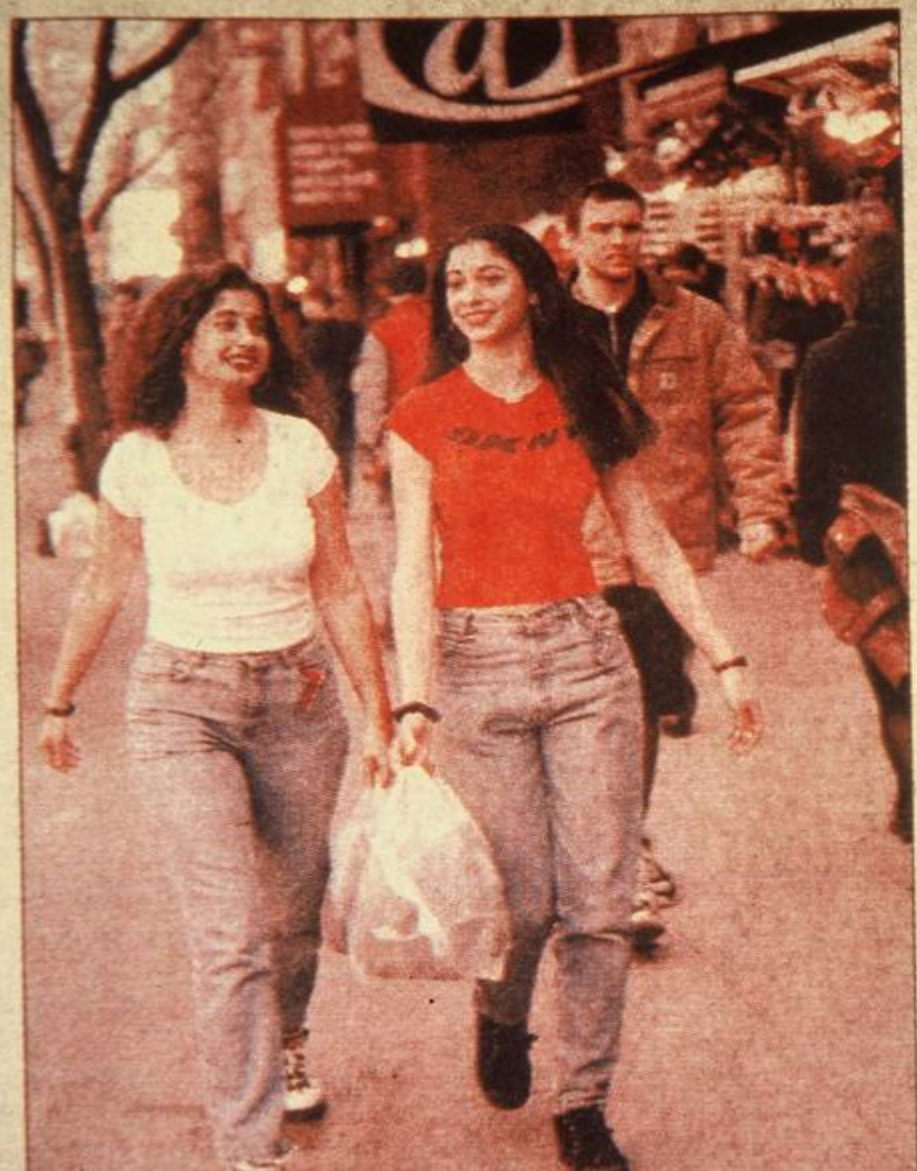
- US needs over $2 trillion for repairs and upgrades to roads, bridges & other infrastructure
- Fed. State &local government spend less than half this amount
- Federal Gas tax hasn’t been raised since 1993
- US is falling behind our global competitors

Market Trends

- “It is becoming clear that homebuilders old one-size fits all marketing and product approach will not work for buyer groups whose interests & borrowing requirements differ widely, not only from buyers of the recent past, but also from each other.”

- Source: Builder Magazine, July 2009

Consumer attitudes are changing



COVER STORY

Malls are like, totally uncool, say hip teens

The bigger question for retailers is, will parents follow their offspring?

By Bruce Horovitz
USA TODAY

The future of retailing in America may all come down to where Jessica Pfeifer shops. There's one place it's not: the mall.

Anyplace *but* the mall.

For this 18-year-old high school senior and her 15-year-old sister, Andrea, the mall has become entirely uncool. Most malls are filled with cubicles that all sell similar stuff. And many teens get the heebie-jeebies being followed around by walkie-talkie wielding security guards and suspicious store clerks who keep flashing them evil eyes.

The Pfeifer sisters live in Manhattan and used to take the train to regional malls. Now they and their friends who live

Saving Landmarks

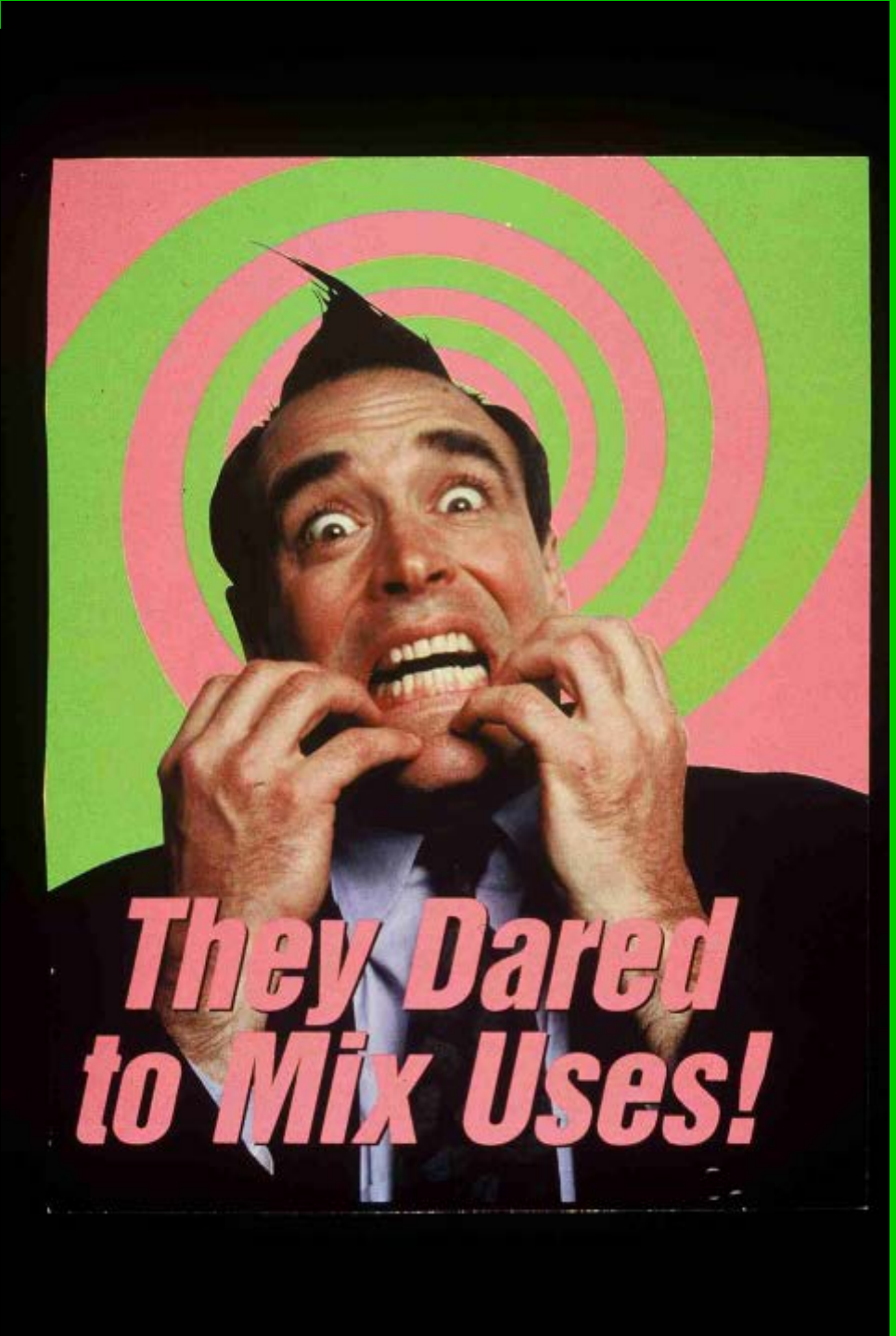
Losing Landscape

Cleaning-Up Our Air & Water

Losing Our Sense of Place

The Patterns of Development

- Where you put development
- How you arrange development
- What development looks like



- How we arrange development

We Can Have This:

Spread Out
Single Use
Drivable Only

Or This!

Wal-Mart, Tysons Corner, VA
Walmart
Walmart

Dairy Queen
Dairy Queen

Americans say they don't like 2 Things

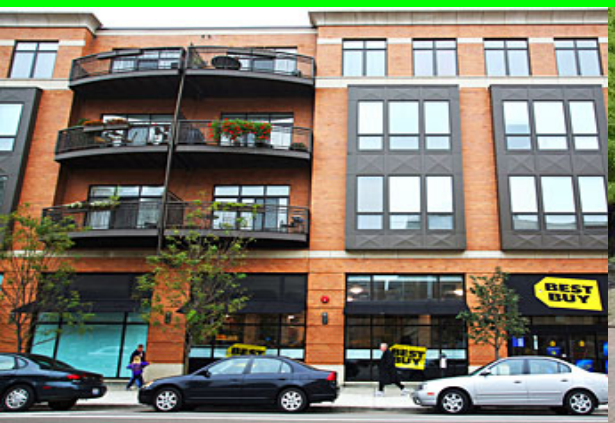
- To much sprawl

- To much density

Compact: Can Be Attractive & Valuable

Keys to Walkable Communities

- High Quality Design
- Access to Green Space
- Amenities
- More choices in ways to get around
- High Density only in clearly defined areas



Compact design should come with compensating amenities.

Sidewalks

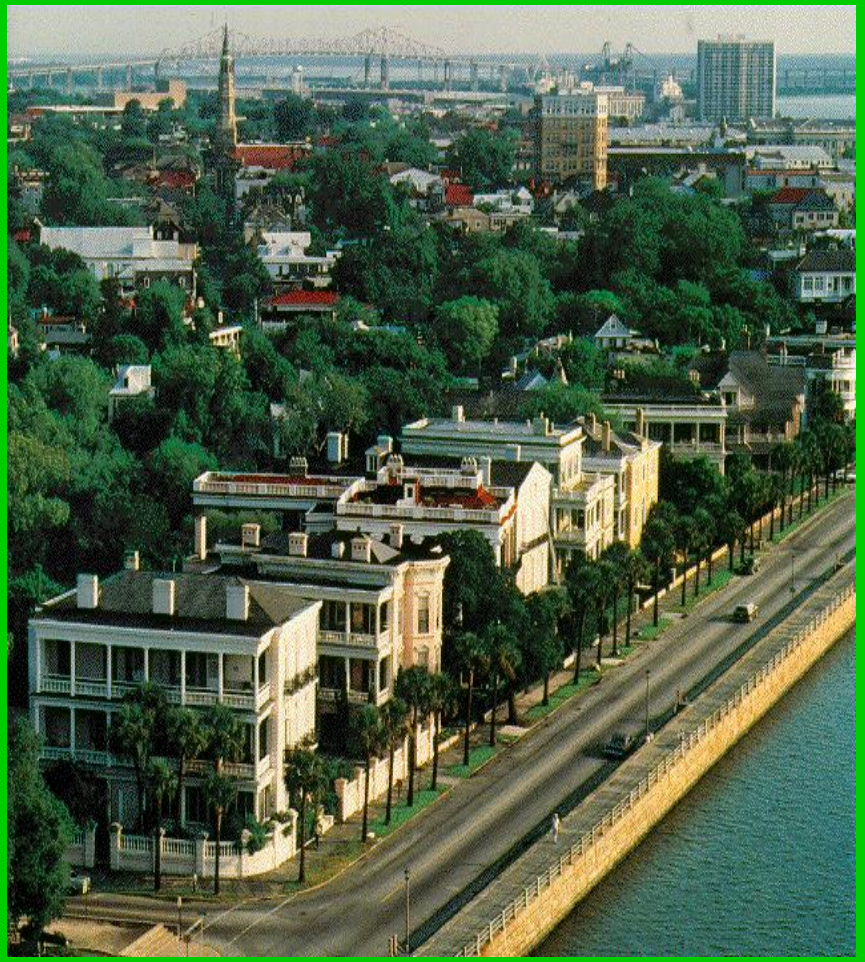
Green space

Parks

Bike paths

Density Comparisons

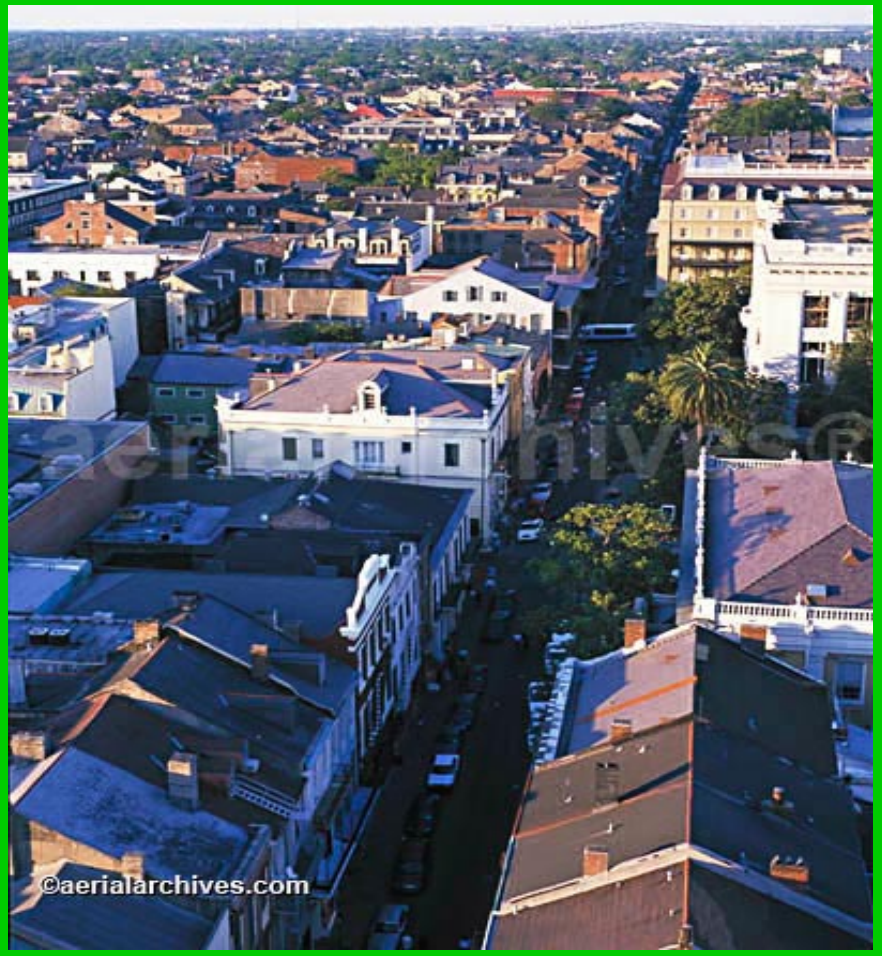
Sun City, AZ – 5.0 units per acre



Charleston, SC – 8.3 units per acre

Density does not demand high rises

Las Vegas, 37.4 Units per acre



New Orleans, 38.9 units per acre

As we grow our communities we must also green our communities

Minneapolis Park System

Metro St. Louis Greenway Plan

How Do We Green A Region?

Street Trees

Green Parking Lots

Green Roofs

Greenways

How Do You Green A Region?

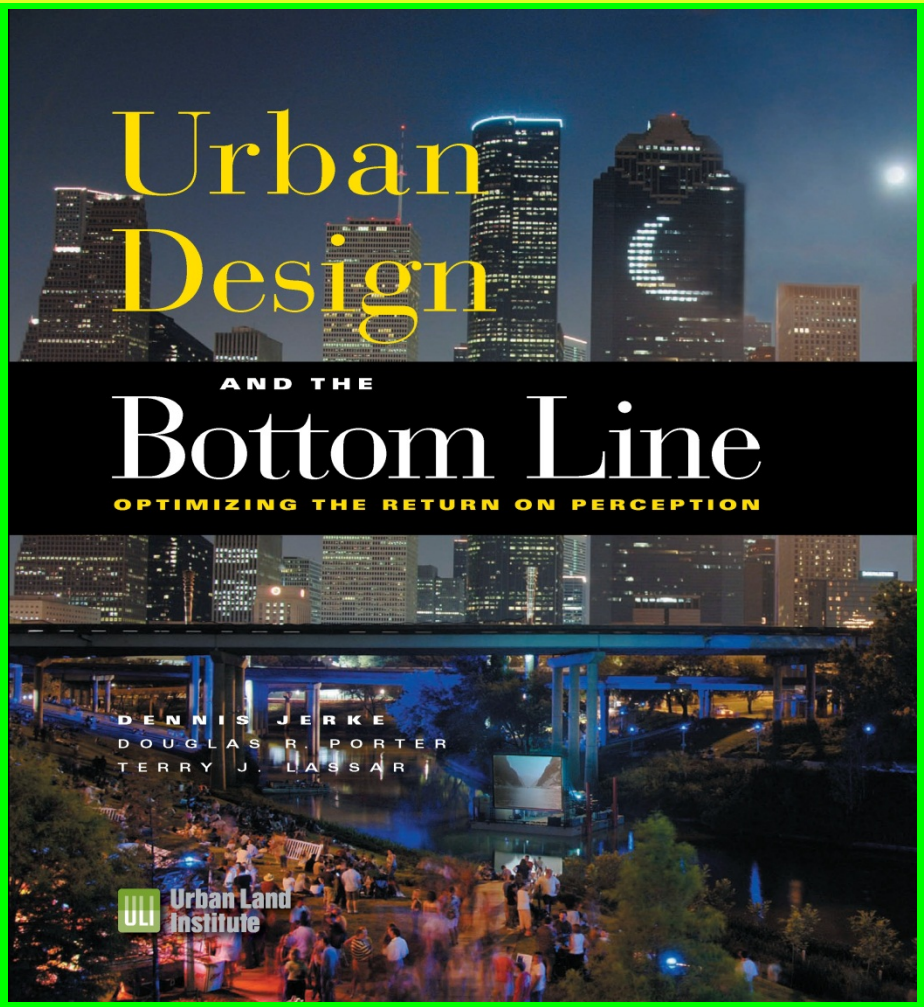
Green Sound Walls

Community Gardens

Rain Gardens

Regional parks

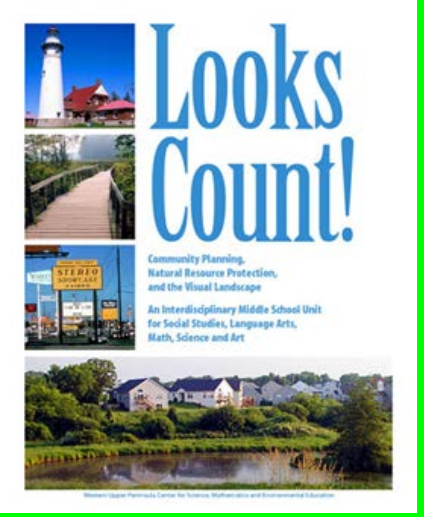
Green Space & Property Values



- "The relationship between rising property values and green spaces is well documented."
- "Some studies find as much as a 15 to 30 % increase in the value of properties adjacent to parks and open space."

What does development look like?

MIDFIELD
CITY LIMIT
76
Salem
Phone
SPE I
E
E N
Marlboro
AND OTHER CIGARETTES
SOLD HERE

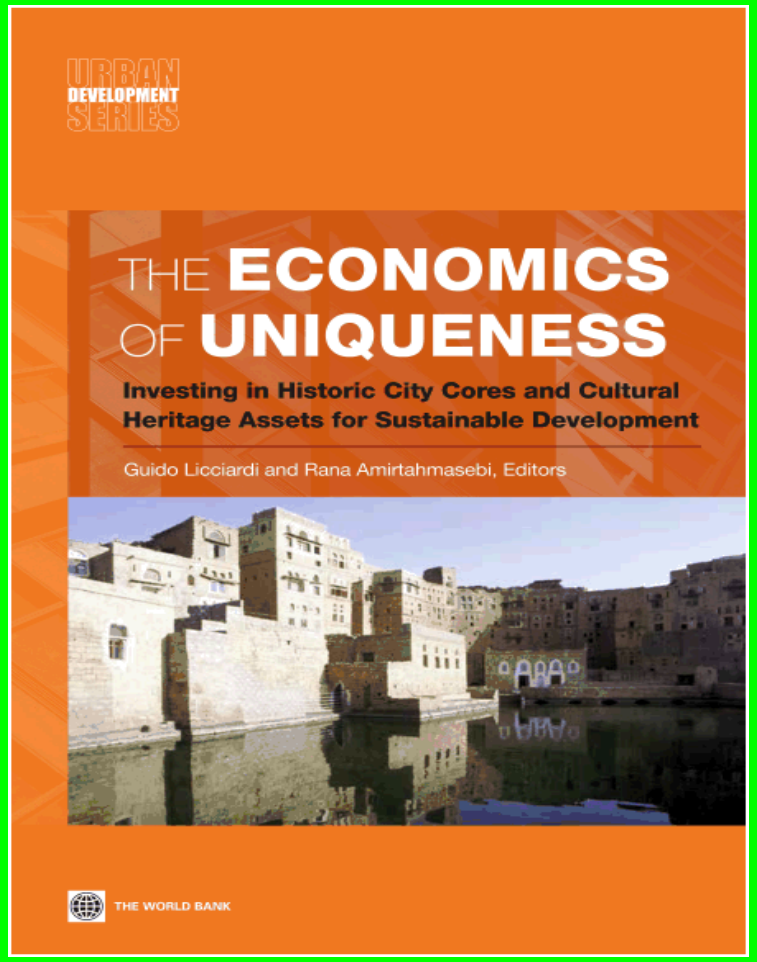


COMMUNITY IMAGE
IS CRITICAL
TO ECONOMIC VITALITY
AND QUALITY OF LIFE

“We take stock of a city like we take stock of a man. The clothes or appearance are the externals by which we judge.”

- Mark Twain

Distinctiveness has value!



- "Sameness is a minus, not a plus in today's world."
- "If you can't differentiate your community or region, you will have no competitive advantage."

Secrets of Successful Communities & Regions

1. Develop a shared vision for the future
2. Inventory regional & local assets
3. Build plans around the enhancement of assets
4. Use education, incentives, partnerships, and voluntary initiatives, not just regulation
5. Cooperate for mutual benefit
6. Pick and choose among development proposals
7. Consider community character as well as ecology and economics
8. Have strong leaders and committed citizens

Most Polluted City

Model for Community Revitalization

Inventory Assets

- Natural Resources
- Cultural Resources
- Human Resources
- Economic Resources
- Educational Resources

Sometimes the Assets are Obvious

Sometimes They Are Not Obvious

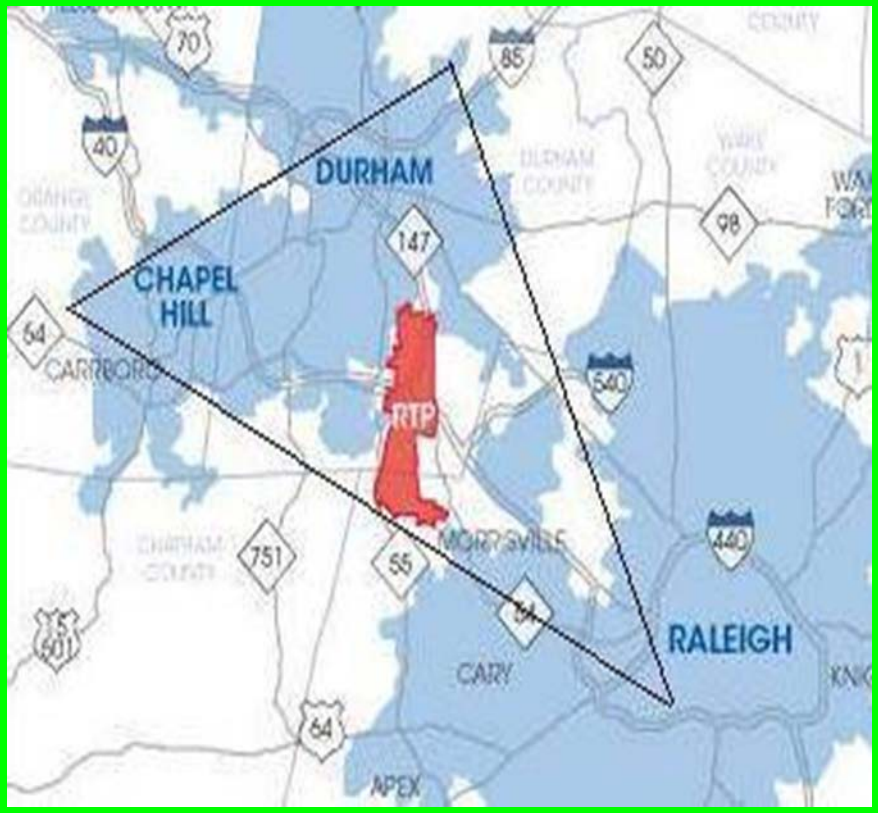
Explore Beyond Regulation

- Education
- Incentives
- Partnerships
- Voluntary Initiatives

Why Do We Educate?

Why Should We Use Incentives?

Successful Regions Cooperate for Mutual Benefit



Research Triangle, NC

Fast Tracks Transit, Metro Denver

SUCCESSFUL COMMUNITIES PICK AND CHOOSE AMONG DEVELOPMENT PROPOSALS

Two Suburbs – 2 Approaches

Rockville, MD

1 story
Lots of parking in front of building

Bethesda, MD

3 stories
No parking in front of building

Which one is more profitable?

Rockville Pike

1 Way to get here:

- Drive your car

Downtown Bethesda

4 Ways to get here

- Drive your car
- Take Metro
- Ride your bike
- Walk

"People stay longer, spend more money and come back more often to places that attract their affection."

Source: *Urban Design and the Bottom Line*, ULI, 2009

Hometown Heroes

“Never doubt that a small group of committed individuals can change the world. Indeed, it is the only thing that ever has”

-Margaret Mead

It’s Not Always Easy

Leadership is important
But often unappreciated

“Apart from sanitation, medicine, education, wine, public order, roads, irrigation, public health and a freshwater system, what have the Romans ever done for us?”

Monty Python’s, Life of Brian

A Final Thought

Vision counts, but implementation is priceless!

THANK YOU!