2050 Control Totals
Net Migration By Age 2007-2013 based on 1-yr ACS Data

- Net migration total = 32,752
But employment change over this period = 0

Is migration related to employment any more?
Land Use Changes in Future Scenarios
Product Preferences Will Change over Time

Distribution of Kansas City’s Population

<table>
<thead>
<tr>
<th>Year</th>
<th>Student Housing</th>
<th>Rental Housing</th>
<th>Rent as Couple / Buy Condo</th>
<th>Young Family Own</th>
<th>Mature Family Own</th>
<th>Empty Nester Downsize Own</th>
<th>Buy/Rent Retirement Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>Millennials</td>
<td>Millennials</td>
<td>Millennials</td>
<td>Gen X</td>
<td>Baby Boomers</td>
<td>Baby Boomers</td>
<td>Eisenhewors Baby Boomers</td>
</tr>
<tr>
<td>2020</td>
<td>Gen Z</td>
<td>Millennials</td>
<td>Gen Z</td>
<td>Gen X</td>
<td>Baby Boomers</td>
<td>Baby Boomers</td>
<td>Eisenhewors Baby Boomers</td>
</tr>
<tr>
<td>2025</td>
<td>Gen Z</td>
<td>Gen Z</td>
<td>Gen Z</td>
<td>Gen X</td>
<td>Baby Boomers</td>
<td>Baby Boomers</td>
<td>Baby Boomers</td>
</tr>
<tr>
<td>2030</td>
<td>Gen Z</td>
<td>Gen Z</td>
<td>Gen Z</td>
<td>Gen X</td>
<td>Baby Boomers</td>
<td>Baby Boomers</td>
<td>Baby Boomers</td>
</tr>
</tbody>
</table>

NOTE: “Top 50 MSAs – Population Distribution” represents the age distribution of all MSAs examined, applied to Kansas City’s overall population

Source: RCLCO; ESRI Business Analyst

Housing in the Evolving American Suburb: Kansas City | January, 2018
Housing in the Evolving American Suburb
The Kansas City Story

Prepared for ULI Kansas City  |  January 24, 2018
Scenario Planning

Positioning the Kansas City region for success
Driving forces

We’re living in a time of great change, driven by forces largely beyond our control.

- Rapidly emerging new technologies
- Climate change — more weather extremes
- Globalization of our regional economy
- Shifting demographics
How can we stay on track to achieve our vision of vibrant, connected and green region? How can we take advantage of the opportunities, and limit the difficulties, these forces create?
Technical Forecast Committee list of forces for consideration

- Increasing automation
- Internet of things
- Autonomous and connected vehicles
- Health technologies
- Clean energy technologies
- Extreme weather
- Urban heat islands
- Scarcity of clean water
- Species extinction
- Age structure
- Diversity
- Poverty
- Net migration
- Globalization
- Geopolitical instability
- Domestic energy production
- Income inequality
- Free-agent economy
- Resource constraints
- Macroeconomic instability
Extreme weather
Increasing automation
Free-agent economy
Species extinction
Scarcity of clean water
SPPC – High Likelihood and Significance
SPPC – High Likelihood and Significance

Increase in income inequality
Fewer workers to support retirees

SPPC – High Likelihood and Significance
Fewer low-to-medium-skill jobs
Increase in extreme weather
Climate increases infrastructure cost.
SPPC - Potential "Blind Spots"
New global middle class creates higher growth.

Dramatic increase in human lifespans.

SPPC - Potential "Blind Spots"
Cleaner/cheaper travel

Increase in worker productivity

SPPC - Potential "Blind Spots"
TTPC - High Likelihood and Significance
Fewer workers to support retirees
TTPC - High Likelihood and Significance

Increase in income inequality
TTPC - High Likelihood and Significance

Contract workers increase
Decline of home/auto ownership

TTPC - High Likelihood and Significance
Tech changes
Parking demands
Growth promotes reinvestment
Less efficient development
Resource constraints
More urban heat islands
Tech changes Parking demands

TTPC - Potential "Blind Spots"

Likelihood

Significance

0 2 4 6 8 10

0 2 4 6 8 10

0 2 4 6 8 10
<table>
<thead>
<tr>
<th>Top impacts</th>
<th>Most likely</th>
<th>Most significant</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CLIMATE CHANGE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase in extreme weather</td>
<td>☀</td>
<td>☀</td>
</tr>
<tr>
<td>Higher energy costs</td>
<td>☀</td>
<td></td>
</tr>
<tr>
<td>Greater impact on low-income residents</td>
<td>☀</td>
<td>☀</td>
</tr>
<tr>
<td>More prevalent disease and illnesses related to heat</td>
<td>☀</td>
<td></td>
</tr>
<tr>
<td>** DEMOGRAPHIC CHANGE **</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fewer working adults to support retiree benefits</td>
<td>☀</td>
<td>☀</td>
</tr>
<tr>
<td>Competition for resources between ages and races</td>
<td>☀</td>
<td>☀</td>
</tr>
<tr>
<td>Demand for transportation choices</td>
<td>☀</td>
<td></td>
</tr>
<tr>
<td>Labor shortages and rising unemployment</td>
<td>☀</td>
<td></td>
</tr>
<tr>
<td><strong>ECONOMIC CHANGES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase in income inequality</td>
<td>☀</td>
<td>☀</td>
</tr>
<tr>
<td>Contract workers make employment more unpredictable</td>
<td>☀</td>
<td>☀</td>
</tr>
<tr>
<td>More frequent and severe boom/bust cycles</td>
<td>☀</td>
<td>☀</td>
</tr>
<tr>
<td><strong>TECHNOLOGICAL CHANGES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fewer low- to medium-skill jobs</td>
<td>☀</td>
<td>☀</td>
</tr>
<tr>
<td>Increasing role of data requires new ways to use, store and manage it</td>
<td>☀</td>
<td></td>
</tr>
<tr>
<td>Highly automated vehicles reduce traffic fatalities and injuries</td>
<td>☀</td>
<td>☀</td>
</tr>
<tr>
<td>Widening of the digital divide</td>
<td>☀</td>
<td></td>
</tr>
</tbody>
</table>
Policy Goals

**Economic vitality** - Support an innovative, competitive 21st-century economy.

**Placemaking** - Coordinate investments along region’s centers and corridors as a means to create vibrant places and strengthen the quality of the region.

**Equity** - Ensure all people have the opportunity to thrive.

**Provide Choices** - Expand affordable and accessible options in order to better connect residents and visitors to jobs and services.

**Safety and security** - Improve safety and security for all in residents and visitors to the region.

**System condition** - Ensure public investments are maintained in good condition.

**System performance** - Manage existing systems to achieve reliable and efficient performance and maximize the value of existing investments.

**Public health** - Facilitate healthy, active living.

**Environment** - Protect and restore our region’s natural resources (land, water and air) through proactive environmental stewardship.

**Climate change and energy use** - Decrease the use of fossil fuels through reduced travel demand, technology advancements and a transition to renewable energy sources.
What kind of land use changes can we expect to see?

What would be most helpful to achieve our goals?
Future of Retail

• Nordstrom/Oak Park and Independence Center in the news
• eCommerce/Internet sales
• Re-uses of Excess Retail Space, Excess Parking
  • Mixed use? Multifamily? Last mile distribution hubs?
• Transportation/Goods Movement — How many trips are for shopping?
• Equity Impacts/Digital Divide/Access to Payment Media
• Waste (packing materials)
• Workforce — How many jobs are in retail?
Activity Center Update
Updated Activity Centers

http://arcg.is/2mjeLzi
Place Types
Population-based Place Types

4 groups, 7 variables

Variables:
• 2000-2010 household change
• Total households
• Year built 1995
• Mean income
• Density of residential units
• Sum of workers
• Median race of head of household
Employment-Based Place Types

Variables considered for grouping tracts by common characteristics

- Employment by tract
- Employment by tract, per acre
- Employment change (2002-2010)
- Variables from UrbanSim (race, value, age, sector, tenure, ratio of jobs to households, recent movers, cars, year built)
- % minority population
- Change in vacancy rate
- Change in persons per household
- Household income
- High-income job hot spots and cold spots
- Educational attainment
- English proficiency
- Proximity to highway ramps
- Proximity to high-income job clusters
- Proximity to high-income household clusters
- Walkability + intensity of development
Options for employment data to use in employment-based place types

2002-2010 Employment Change

2010-2015 Employment Change
Options for employment data to use in employment-based place types

2002-2010 Employment Change per Acre

2010-2015 Employment Change per Acre
Preliminary place types based on employment per acre (2010)
Capacity Data Development
Legend

Land Use Edits 2018

Existing + Planned Land Use

Land Use/Future Land Use
- Residential SF Medium
- Right-of-Way
- Residential SF Low
- Residential SF Very Low
- Public/Semipublic Low
- Residential SF High
- Commercial Low
- Residential MF Medium
- Residential MF High
- Office Low
- Indust./Bus. Park Low
- Mixed Use High
- Railroad Right-of-Way
- Education Low
- Residential MF Low
- Residential MF Low-Med
- Hotel/Motel 1
- Parking
- Office High
- Residential SF Large Lot
- Residential SF Rural Policy
- Residential SF Urban Fringe
- Commercial High
Plan for review of development project data