

# Did We CONNECT Our Future?

## A Look Back at Land Use



CONNECT Our Future is one of the most comprehensive regional efforts to date, aimed at building relationships across our region, reaching consensus on shared values and goals and developing strategies to achieve those goals. The results included a regional growth framework, a vision for how our region should grow to align resources and efforts across the 14 counties. The following is a five-year review of that plan, with the goal of highlighting data and local and regional successes for the purpose of informing our future priorities.

Conditions were evaluated based on empirical data collected from secondary sources and stakeholder interviews with local planning officials held throughout the region for the period between 2010 and 2018. Some of the information collected demonstrated a direct connection to the regional effort, while other information determined if the actions of local governments, advocacy groups, private businesses, etc. combined to positively influence one or more broad goals from CONNECT Our Future.

## POPULATION AND EMPLOYMENT GROWTH, 2010 TO 2018

The study area for CONNECT Our Future grew in population every decade for the last 100 years, nearly doubling or tripling U.S. growth rates during the housing boom between 2000 and 2008. Following the Great Recession, population and employment growth slowed to ten-year lows in 2010 and 2011. However, a continued economic recovery and increased migration to the Sun Belt in the decade that followed influenced a new population and employment boom in the region, pushing Charlotte to the 15th most populous city in the U.S. for 2019.



Vibrant Communities – Robust Region

Both Concord and Huntersville grew in total population by more than 20% in the last decade and officials for other cities, towns and counties throughout the region reported significant population and employment growth. A building frenzy to provide new homes, schools, offices, restaurants, shopping centers, etc. occurred in new or expanding population and employment centers to keep up with demand. Competition for housing in some areas increased sales prices or rents to the point that some portions of the region are faced a significant shortage of affordable homes.

Base year population and employment data (socioeconomic data) for the region represented in the Metrolina Regional Travel Demand Model (MRM) was reviewed to document trends between 2010 and 2018. Data for Anson County, the only county outside of the MRM study area, was collected from the North Carolina Statewide Travel Demand Model for the period between 2011 and 2020.

*Demographic information for the article was summarized from the CONNECT Our Future Regional Scan Document (2013) or Annual Estimates of Resident Population for Incorporated Places of 50,000 or More Ranked (2019) from the U.S. Census Bureau. Both are available from Centralina Regional Council and provide detailed demographic data and rankings for the region.*

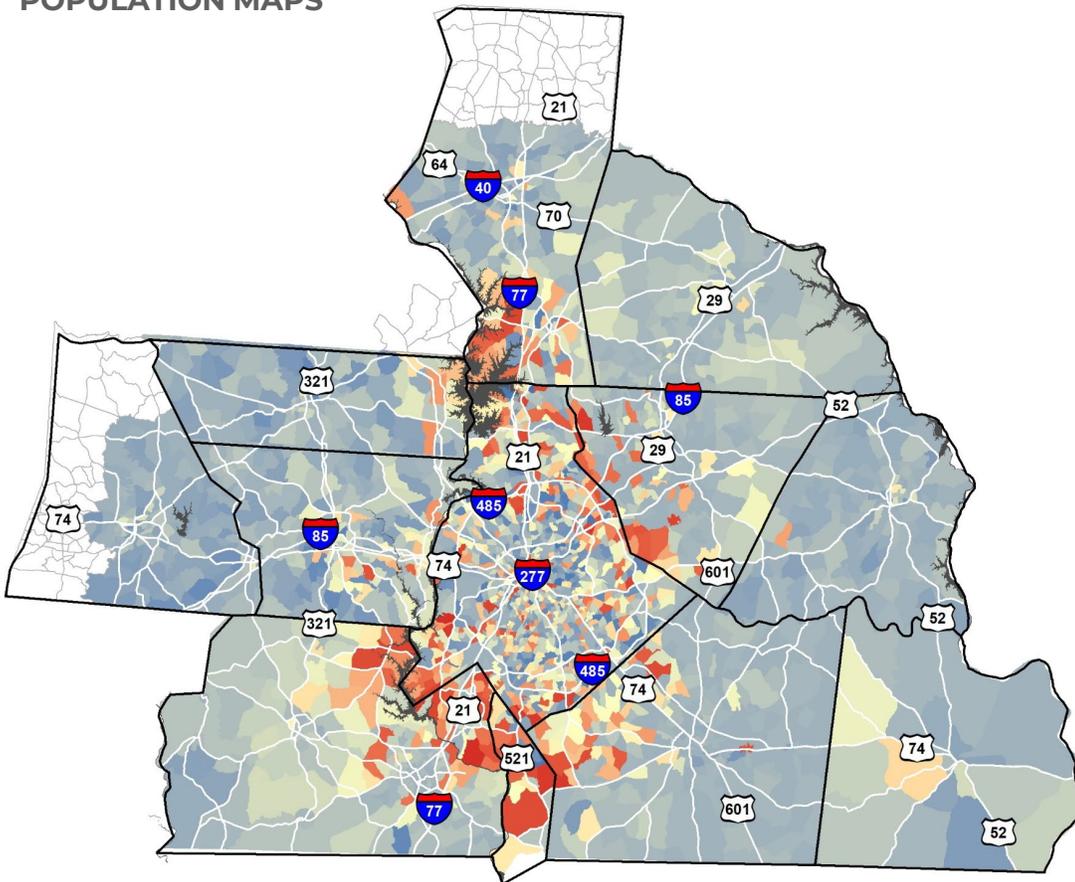
## POPULATION

Speaking regionally, total population grew by 394,057 between 2010 and 2018. The distribution of new population in the region was generally focused on Mecklenburg County and the areas immediately adjacent to it in the nearby counties. Uptown Charlotte, the CATS Blue Line Corridor, the North Carolina-South Carolina State Line, Lake Norman, Lake Wylie, larger cities and suburbanizing areas of unincorporated counties all grew over the last decade. The map below displays the change in population between 2010 and 2018 for the region. An inset map of Central Charlotte displays population changes in Uptown Charlotte and the CATS Blue Line Corridor for the same period.

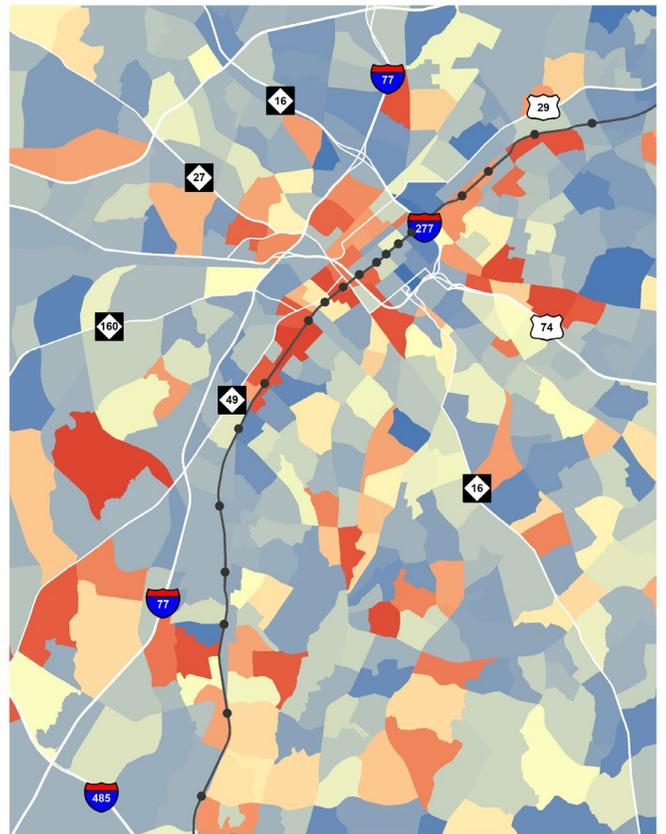
County in the Region	 Household Change	 Population Change	 Employee Change
Anson County	6%	4%	7%
Cabarrus County	17%	18%	18%
Cleveland County	35%	31%	53%
Gaston County	7%	6%	32%
Iredell County	17%	17%	46%
Lancaster County	61%	52%	262%
Lincoln County	9%	4%	24%
Mecklenburg County	28%	22%	33%
Rowan County	5%	5%	7%
Stanly County	4%	4%	8%
Union County	15%	15%	36%
York County	23%	22%	18%

Source: Metrolina Regional Model Socioeconomic Data, 2010 and 2018 (All Counties Except Anson) and North Carolina Statewide Travel Demand Model Socioeconomic Data, 2011 and 2020 (Anson County)

# POPULATION MAPS

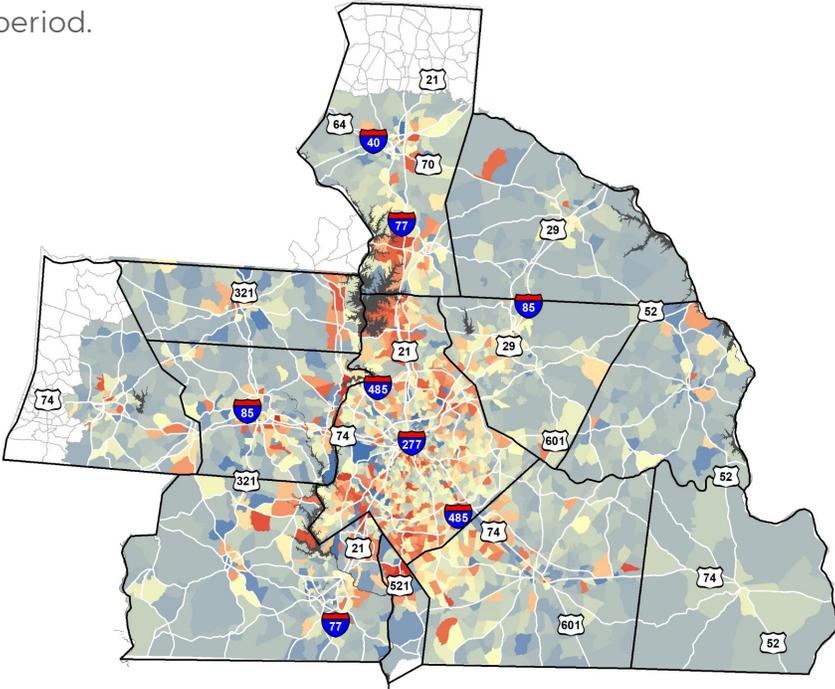


The two maps illustrate gains and losses in population for the region during the nine-year period between 2010 and 2018 using data from the Metrolina Regional Travel Demand Model or the North Carolina Statewide Travel Demand Model (Note: Data for Anson County represents conditions reported for 2011 and 2020 because of data limitations).

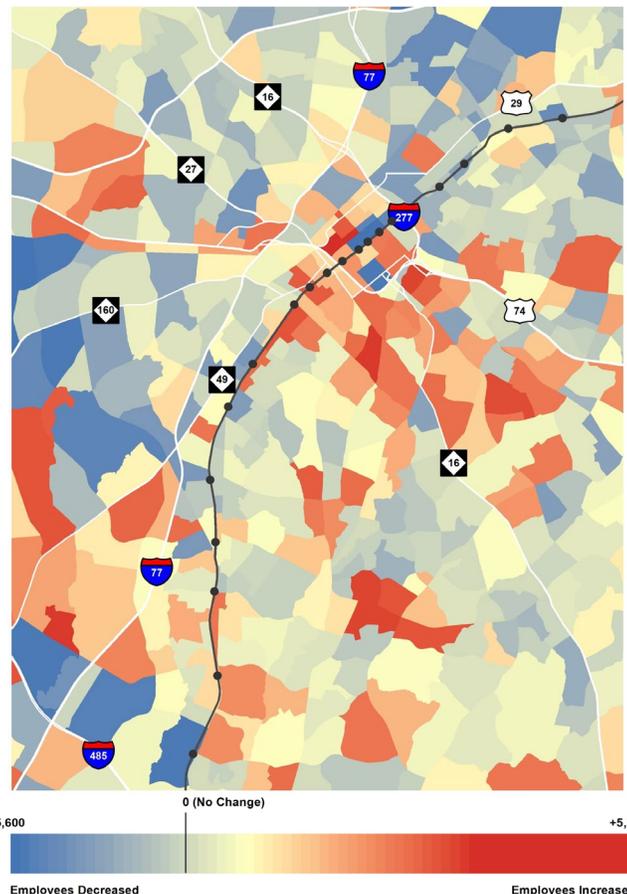


## EMPLOYMENT

Total employment in the region grew by 377,454 between 2010 and 2018. The distribution of new employees compared to population was more dispersed as a region and focused on multiple employment centers or transportation corridors in each county. The map below displays the change in employees between 2010 and 2018 for the region. An inset map of Central Charlotte displays employment changes in Uptown Charlotte and the CATS Blue Line Corridor for the same period.



*The two maps illustrate gains and losses in employees for the region during the nine-year period between 2010 and 2018 using data from the Metrolina Regional Travel Demand Model or the North Carolina Statewide Travel Demand Model (Note: Data for Anson County represents conditions reported for 2011 and 2020 because of data limitations).*

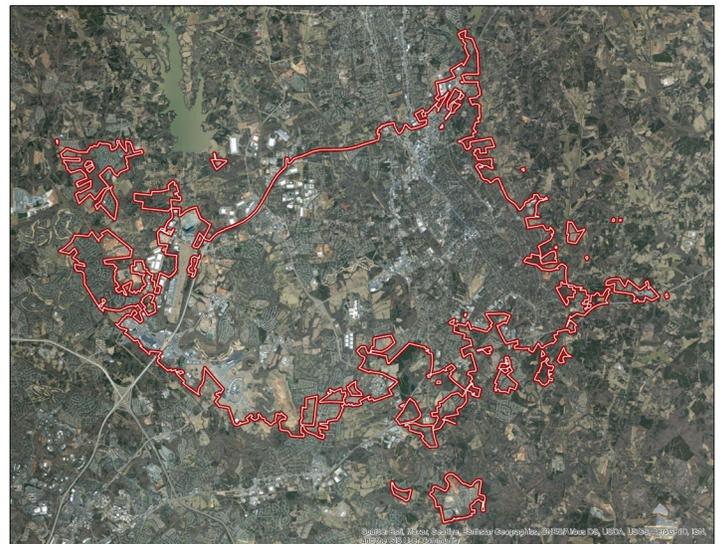


## LAND CONSUMPTION FOR NEW DEVELOPMENT, 2012 to 2018

One indicator for where growth is going in the region relies on development status surveys that were completed in 2012, 2015 and 2018. For each survey effort, regional organizations and their local government partners assigned development status categories — open space, agriculture, developed, undeveloped, infill development opportunity or redevelopment opportunity — to parcels in the study area using aerial photography, property appraiser data and topic-specific GIS data available for the different jurisdictions (e.g., farmland or conservation land inventories). Data was reviewed with cities, towns and counties in the region and adjustments made to more accurately reflect development conditions for the snapshots in time. The effort and coordination to code development status in the region were massive. Nearly 1,000,000 parcels were coded each time for the different development status surveys based on the study area assumed for the individual time periods. More information about development status and the methodology used to record it in the region is summarized in the Metrolina Region CommunityViz Initiative Data Summary Document, v. 2.0 prepared by Centralina Regional Council and their partners.

Speaking regionally, approximately 2% of the study area (68.01 square miles) was consumed for new development between 2012 and 2018, which equates to a total footprint equal to the size of Concord, North Carolina. The most significant change to development status for the time period — the reassignment of a

parcel's development status to one different than the previous category — occurred in Mecklenburg County, whereby approximately 11% of the total land area (60.50 square miles) was recoded developed (from something else) over the period of the three surveys. Approximately one-half of the land consumed for new development in Mecklenburg County was previously identified as either an infill development or redevelopment opportunity — meaning new buildings were placed next to existing building on the same lot (infill development) or existing buildings were removed and replaced with new buildings that were typically taller or occupied a larger portion of the lot (redevelopment). The other half of land consumed in Mecklenburg County to accommodate new development was previously vacant.

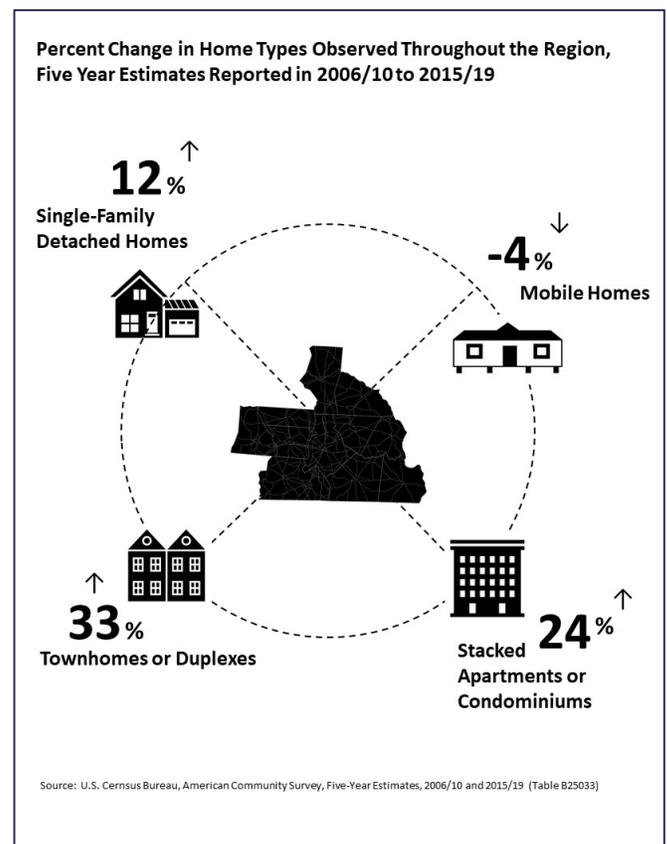


*The total land area consumed to accommodate the footprint for new development in the region between 2012 and 2018 reached the size of Concord, North Carolina.*

Counties adjacent to Mecklenburg also observed an increase in the amount of land developed over the same time period. In these areas, the majority of new developed land occurred as greenfield development, which means the land was previously vacant before the change was recorded. Approximately 1% to 7% of the total land area in the adjacent counties changed from undeveloped to developed status between 2012 and 2018. Far less of the development in the adjacent counties was an infill development or redevelopment opportunity compared to Mecklenburg County. Much of the change for the adjacent counties occurred in areas that expanded the development footprint outward from existing town or city limits.

## RECENT TRENDS FOR HOME CHOICES

A summary of occupied dwelling units by structure type from the U.S. Census Bureau's American Community Survey (ACS) provided a snapshot of home choices for residents living in the region. Five-year estimates for two periods — 2006/10 and 2015/19 — were used to capture conditions similar to those presented for population and employment estimates in the region. Five-year data (as opposed to one-year data) was used to evaluate conditions for the full 12-county region — Iredell, Mecklenburg, Union, Gaston, Cleveland, Lincoln, Cabarrus, Rowan, Anson, Stanly, York and Lancaster — and minimize potential data sampling errors from the ACS that could skew some of the findings and trends reported.



Speaking regionally, most residents lived in single-family detached homes between 2006/10 and 2015/19, followed by stacked apartments or condominiums, mobile homes and townhomes or duplexes. The rank order of occupied home categories for the region did not change over the time period. However, trends observed between the two time periods demonstrate changing home preferences for some residents. The percent change in total number of occupied units by housing type for the decade (compared internally within each housing type category) for both townhomes or duplexes (33% increase) and stacked apartments or condominiums (24% increase) grew faster than single-family detached homes (13% increase). The number of mobile homes in the region decreased by 4% for the same time period.

County-level reporting for the ACS occupied homes data shows “hotspots” in the region for changing home preferences. Mecklenburg County observed nearly an equal amount of new single-family detached homes (28,314) and new stacked apartments or condominiums (27,503) over the decade. Counties adjacent to Mecklenburg observed significant increases in the number of single-family detached homes for the same time period; however, townhomes or duplexes generally registered the largest increase in percent change of all the home categories reported between 2006/10 and 2015/19. York and Lancaster Counties in South Carolina observed tremendous growth over the decade in three home categories: single-family detached, stacked apartment or condominium and townhome or duplex. Edge counties in North Carolina — Cleveland, Rowan, Stanly and Anson — reported modest increases in the number of occupied housing units for the time period. Most were categorized as single-family detached homes.

## **CHANGING DEVELOPMENT PREFERENCES IN ADOPTED LAND USE PLANS, 2012 TO 2018**

Another indicator for how the region is growing relied on different future land use (place type) surveys completed in 2012, 2015 and 2018. For each effort, regional organizations and their local government partners assigned future land use categories — thirty-one different categories representing preferred development types, locations, patterns and intensities in the region — to parcels in the study area using adopted comprehensive plans or zoning ordinances for the different jurisdictions. Data was reviewed and updated using the same process described for development status.

The 31 future land use (place type) categories used for the three surveys of the region were simplified into eight-character areas for this article: open space, rural living, suburban neighborhoods, suburban centers, walkable neighborhoods, walkable activity centers, special places and a category for areas where

data was not available. Speaking regionally, land categorized as rural living in the region increased by 6% between 2012 and 2018. In some communities, the change to rural living recognized an overabundance of the suburban neighborhood character area in previous plans, which could encourage low-density, decentralized growth patterns (sprawl) that is more expensive and less efficient to serve in the future while land remained available to build suburban neighborhoods closer to existing centers and inside existing service areas.

# 29

*Number of different comprehensive plans, land use plans or small area plans that were created or updated in the region since CONNECT Our Future was completed in 2015.*

In other communities, there was a decrease in the amount of rural living areas over the three surveys as communities struggled with solutions to accommodate future growth and development. Some jurisdictions in the region implemented a development vision and policies that supported new walkable, mixed-use activity centers and neighborhoods. Others advocated for more suburban development patterns and intensities as citizens pushed back against development density because of concerns for traffic congestion or school overcrowding.

## **KEY TAKEAWAYS FROM LOOKING BACK ON GROWTH AND DEVELOPMENT IN THE REGION**

The data collected for our look back on growth and development in the CONNECT region confirmed a lot of the stories told by elected leaders and local planning officials. Both population and employment increased throughout the region — and dramatically in Mecklenburg County and the adjacent counties — to levels where some rural areas quickly become suburban, and some suburban areas quickly become urban. The building frenzy to meet increased population and employment demands led to conversations in the community about highest and best land uses for specific areas, acceptable minimum or maximum building densities, losses or gains to community character influenced by new development, affordable housing needs, development potential around transit stations and available infrastructure capacity to meet increased demands.

Land consumed for new development between 2012 and 2018 increased in area to a size matching the footprint of Concord, North

Carolina. Some communities expanded their footprint to accommodate new single-use, low-density suburban development patterns at or near the edges of town or city limits. Other communities directed new development to existing or emerging walkable, mixed-use activity centers and transit corridors. Rising land values in some areas of the region reached levels that made infill development and redevelopment activities more realistic. And, while single-family detached homes still dominate the region, the percent change in townhomes or duplexes and stacked apartments or condominiums increased faster than single-family detached homes through the decade. Communities are also updating their land development plans and in many cases reversing a common trend of the past by limiting the land identified for low-density, single-family residential development and instead categorizing it as rural living to force a more intentional conversation about growth in a previously underdeveloped area.