

Mountain Megs:

Growth, Planning, Governance and Prosperity

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Metropolitan Policy Program
at BROOKINGS

Mountain Megas

I Context: Why look at the West?

II Mega-trends

III Emerging challenges and opportunities

IV Future growth in the Megapolitan West



Blueprint for American Prosperity
Unlocking the potential of a metropolitan future



Mountain *Megas*

America's Newest Metropolitan Places and a Federal Partnership to Help Them Prosper



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a BROOKINGS

Some of the data
in this talk is
from the 2008
Mountain Mega
report from the
Brookings
Institution

The next round
of this research
starts summer
2009



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The Context



Turmoil in the housing sector

Massive House Price
Depreciation in Las
Vegas and Phoenix.
Prices Peak in 2006.

Foreclosure Rates High
in Las Vegas, Phoenix,
and Denver.



Existential threat of climate change

America's carbon footprint is expanding



America just keeps growing

U.S. Census Projections 2000 Census Baseline

Year	High* Series	Mid* Series
2000	275	275
2010	311	300
2030	391	351
2050	553	404
2070	749	464
2090	1,017	534

Look for my article
“American
Demographics--
2109 in the May
2009 issue of
Planning. The
article looks ahead
to a century of
population growth

* In Millions



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Why the West?

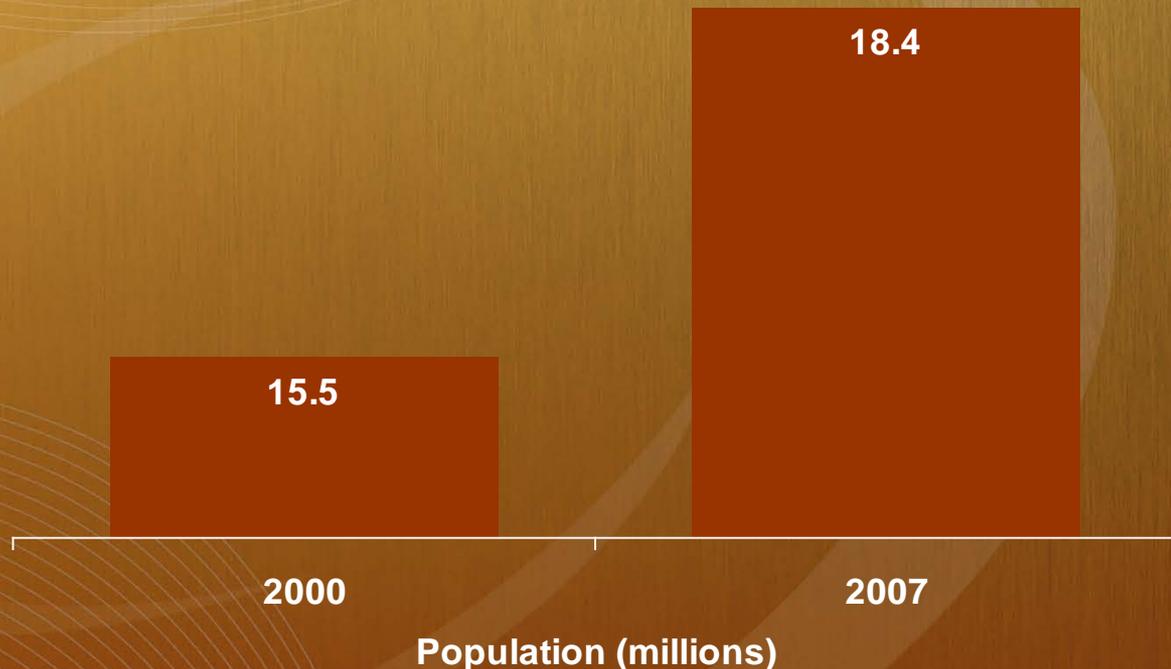


The Western Boom Continues in this Decade

Rapid change is enveloping the American West

Five state region grew by 19 percent from 2000 to 2007

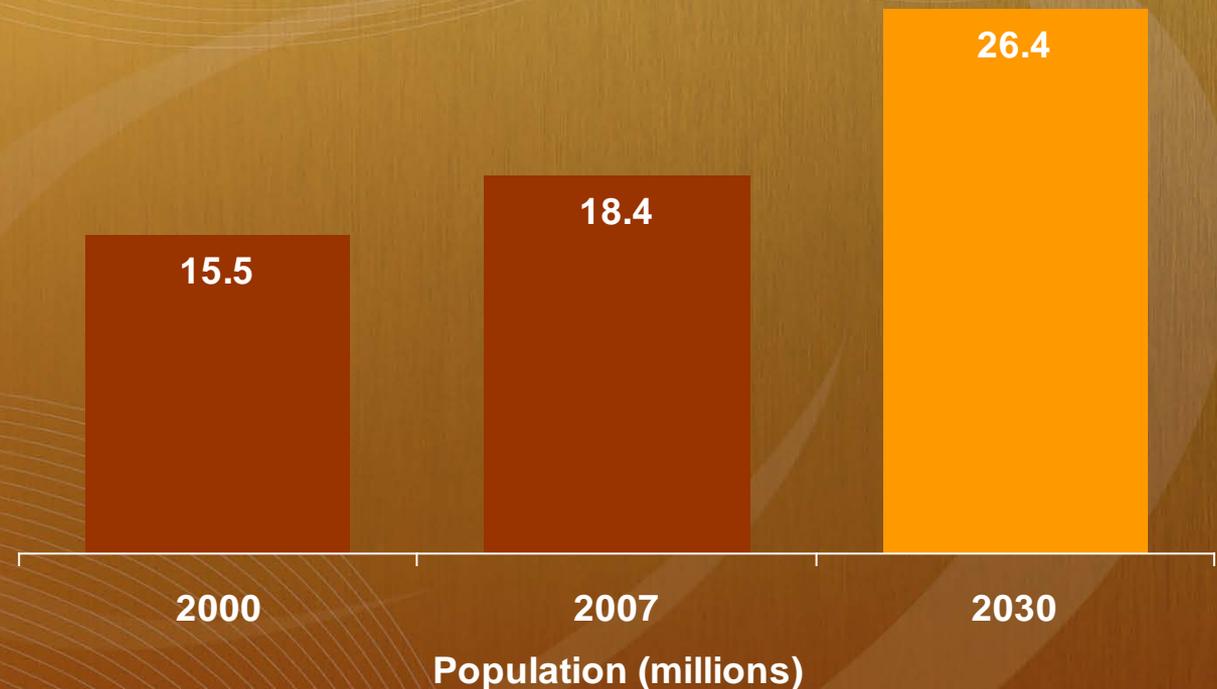
Captured 14 percent of the nation's growth



This Boom will Continue for Decades

By 2030, the Intermountain West will gain another 13 percent of the nation's growth

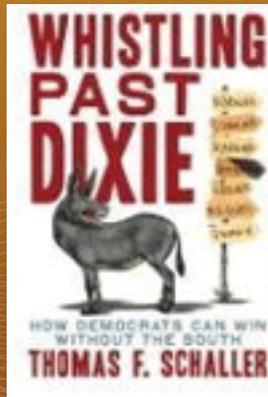
Arizona will have more residents than Michigan and be on its way to surpassing Ohio by 2050



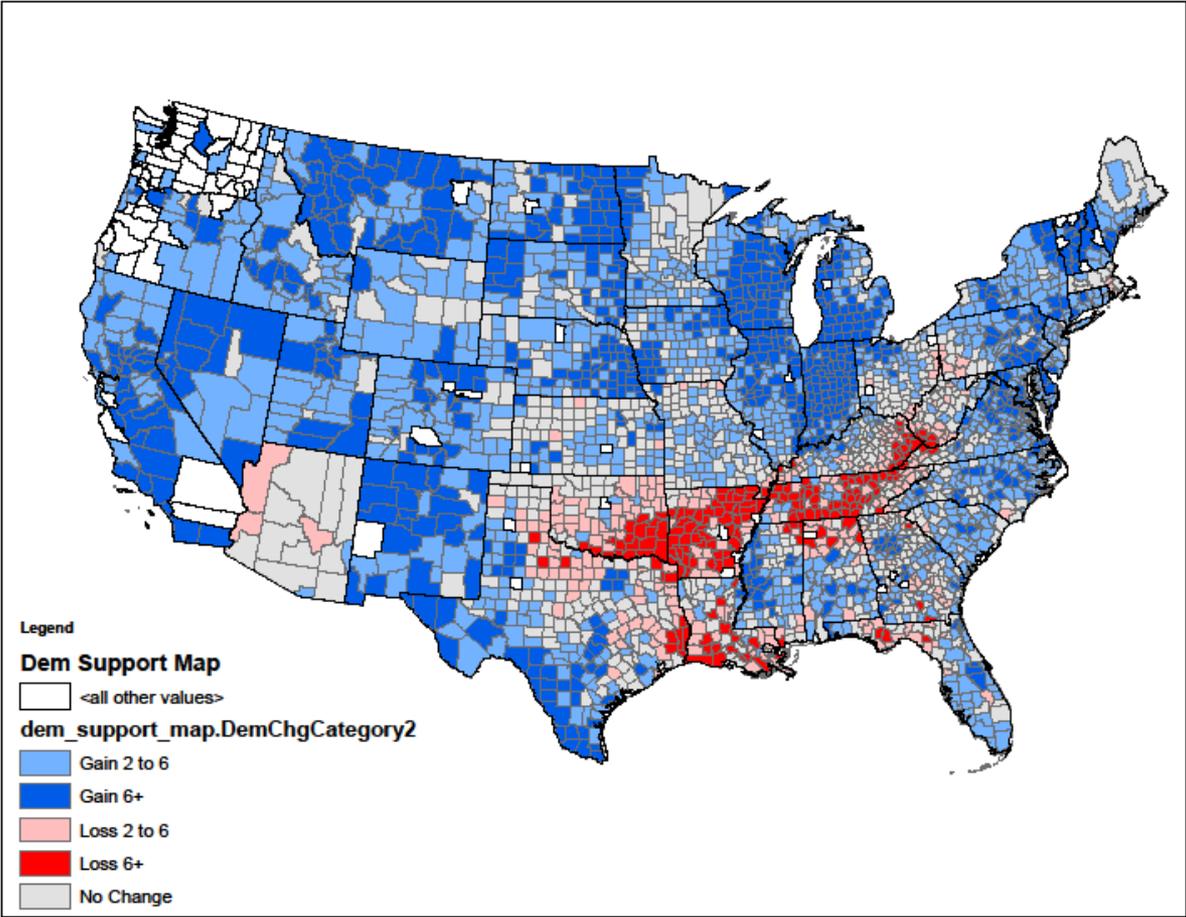
The West is the New Political Battleground

A new assertiveness and new politics make the Intermountain West central beyond 2008

- Increasingly contested
- Three Former Red States—Colorado, Nevada, and New Mexico are Now Blue States. Will Arizona be Next?



USA Today--Democratic Gain/Loss in 2008



Mountain Megas

I Context: Why look at the West?

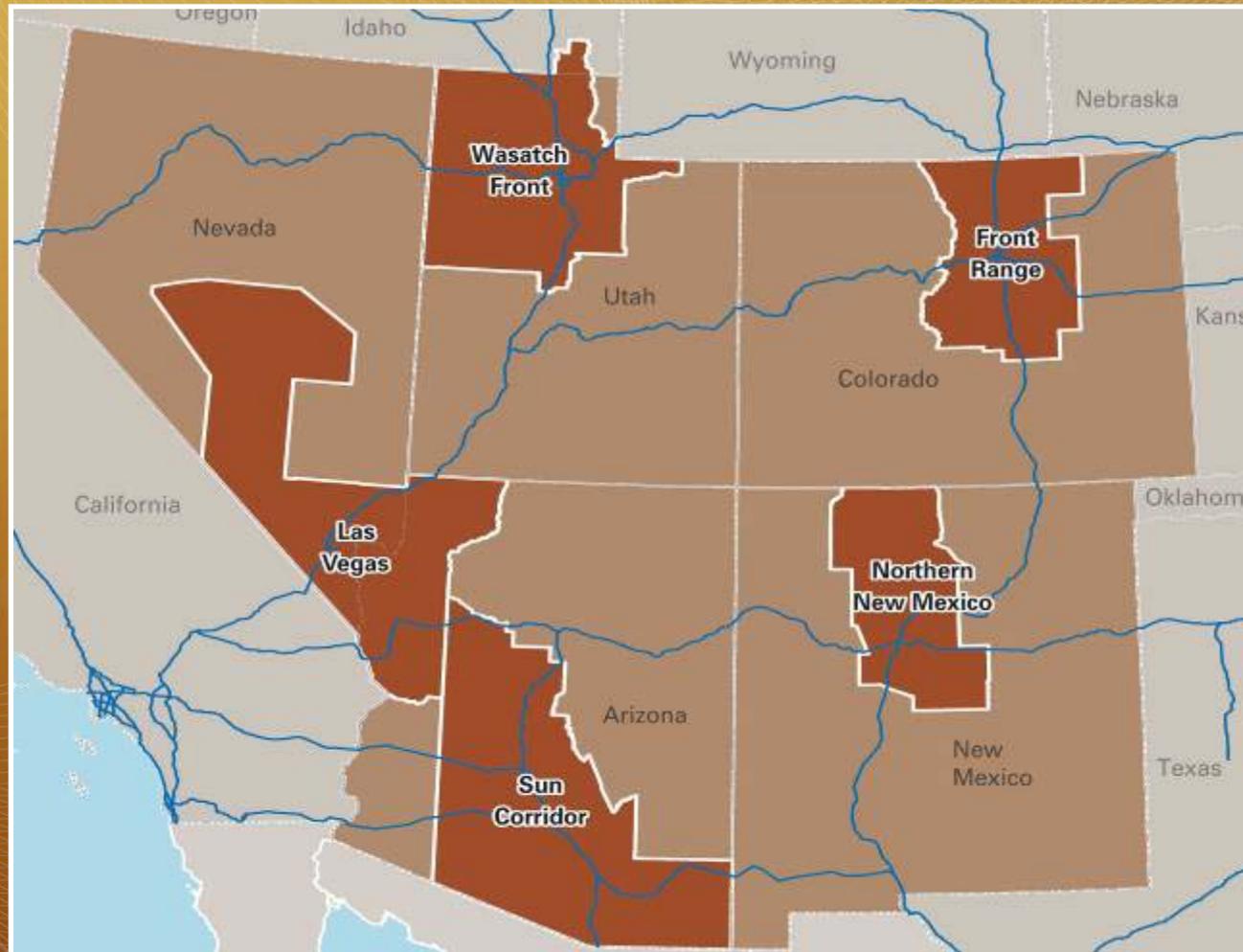
II Mountain Mega-trends

III Emerging challenges and opportunities

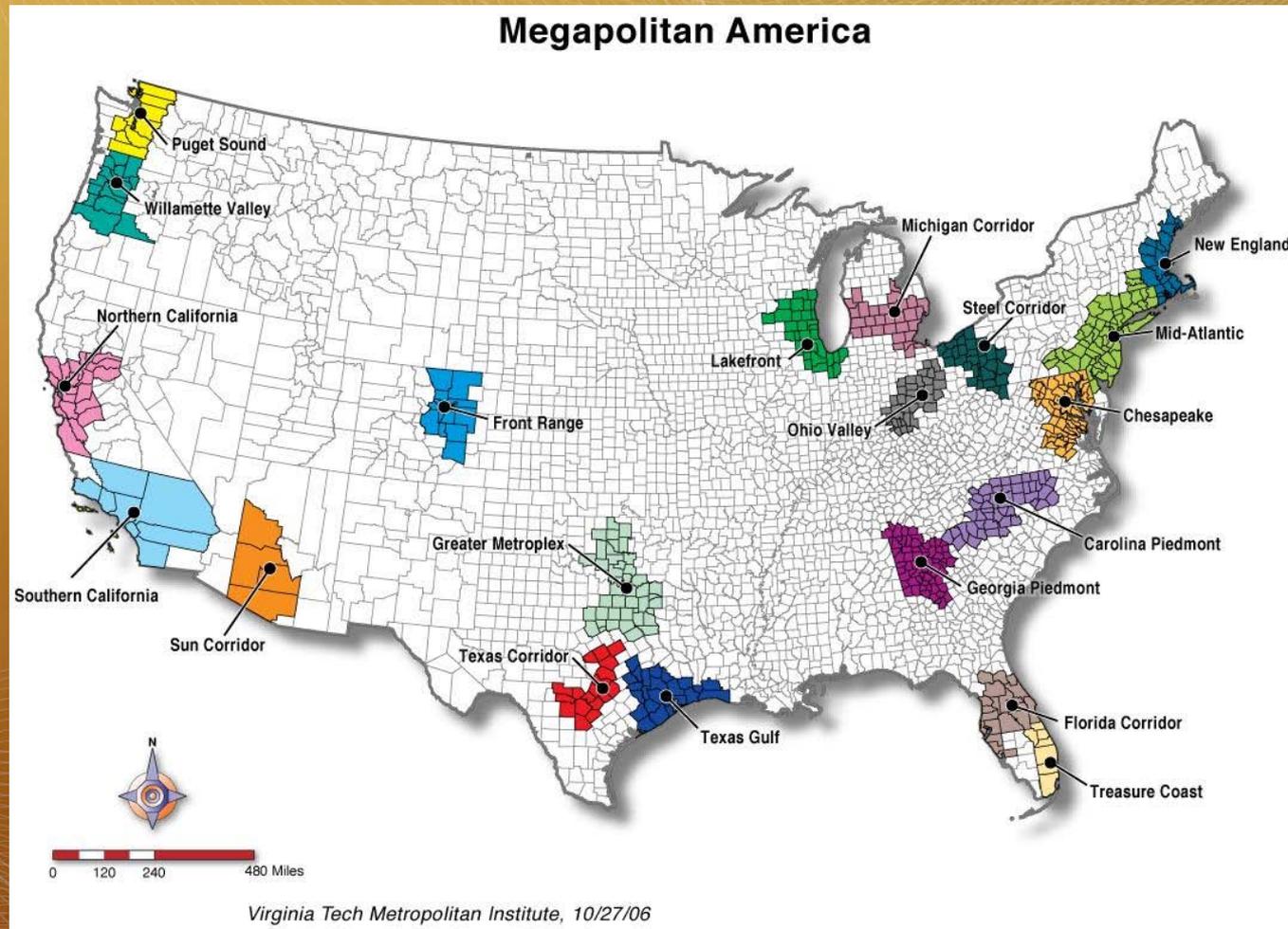
IV Future growth in the Megapolitan West



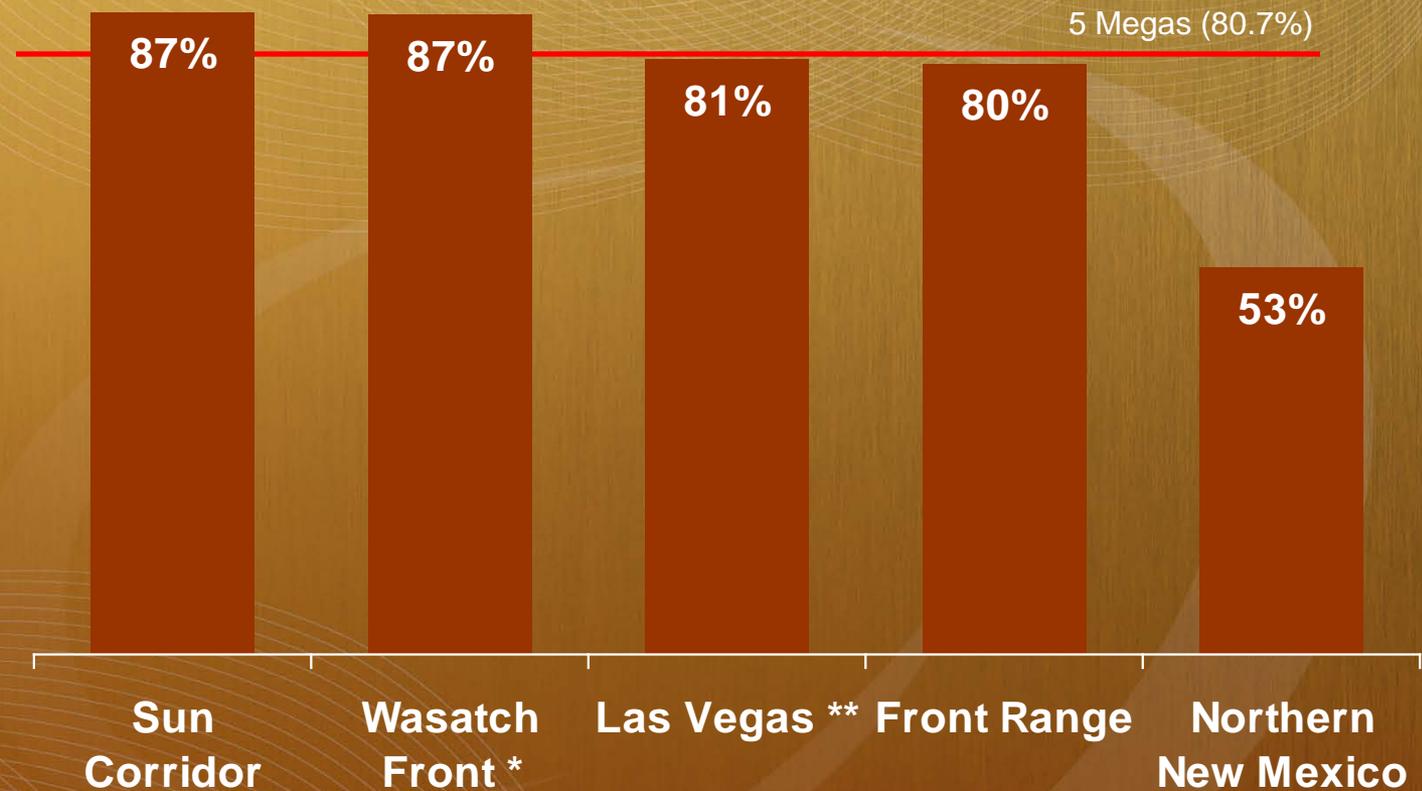
The 2008 Brookingsreport identified five megapolitans in the Intermountain West



The Front Range and Sun Corridor are two of twenty U.S. “megapolitan areas”



As a group, the Mountain megas represent four-fifths of the five states' population



Mega share of state population, 2007

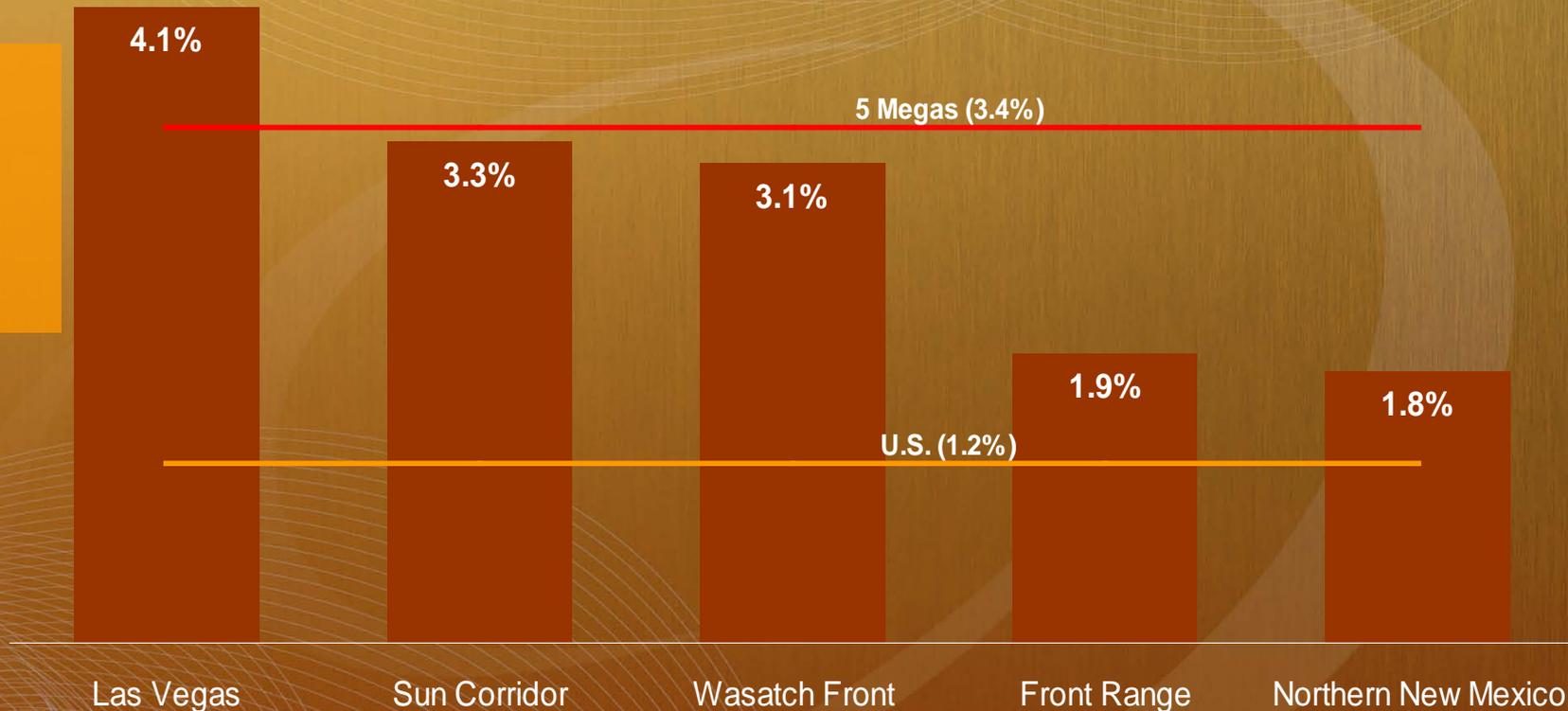
*Number excludes portion of mega in Idaho
**Number excludes portion of mega in Arizona

Source: Census Population Estimates

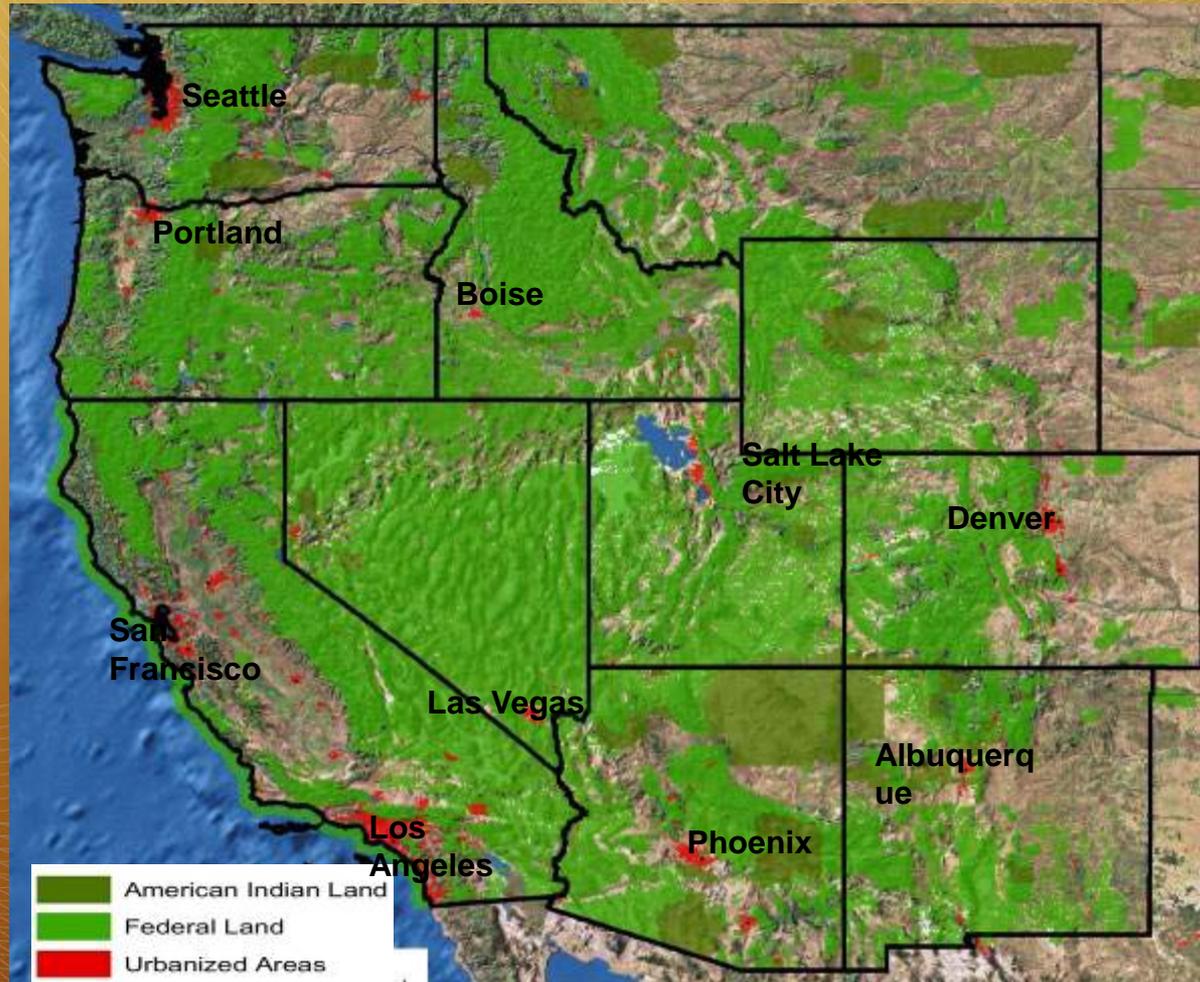
The Mountain megas grew far faster than the national average

...and captured 13 percent of the nation's growth from 2000 to 2007

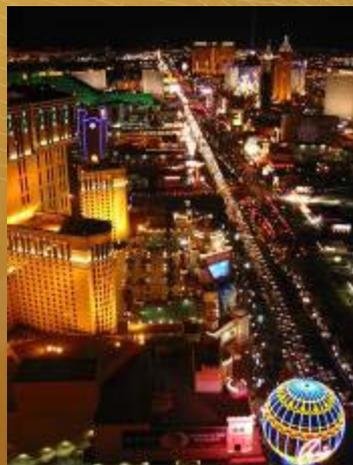
Annual population change, 2000 to 2007



The Mountain megas are highly bounded, often by public land



Fully 86 percent of Mountain mega residents live at urban densities



Mountain Megas

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Infrastructure

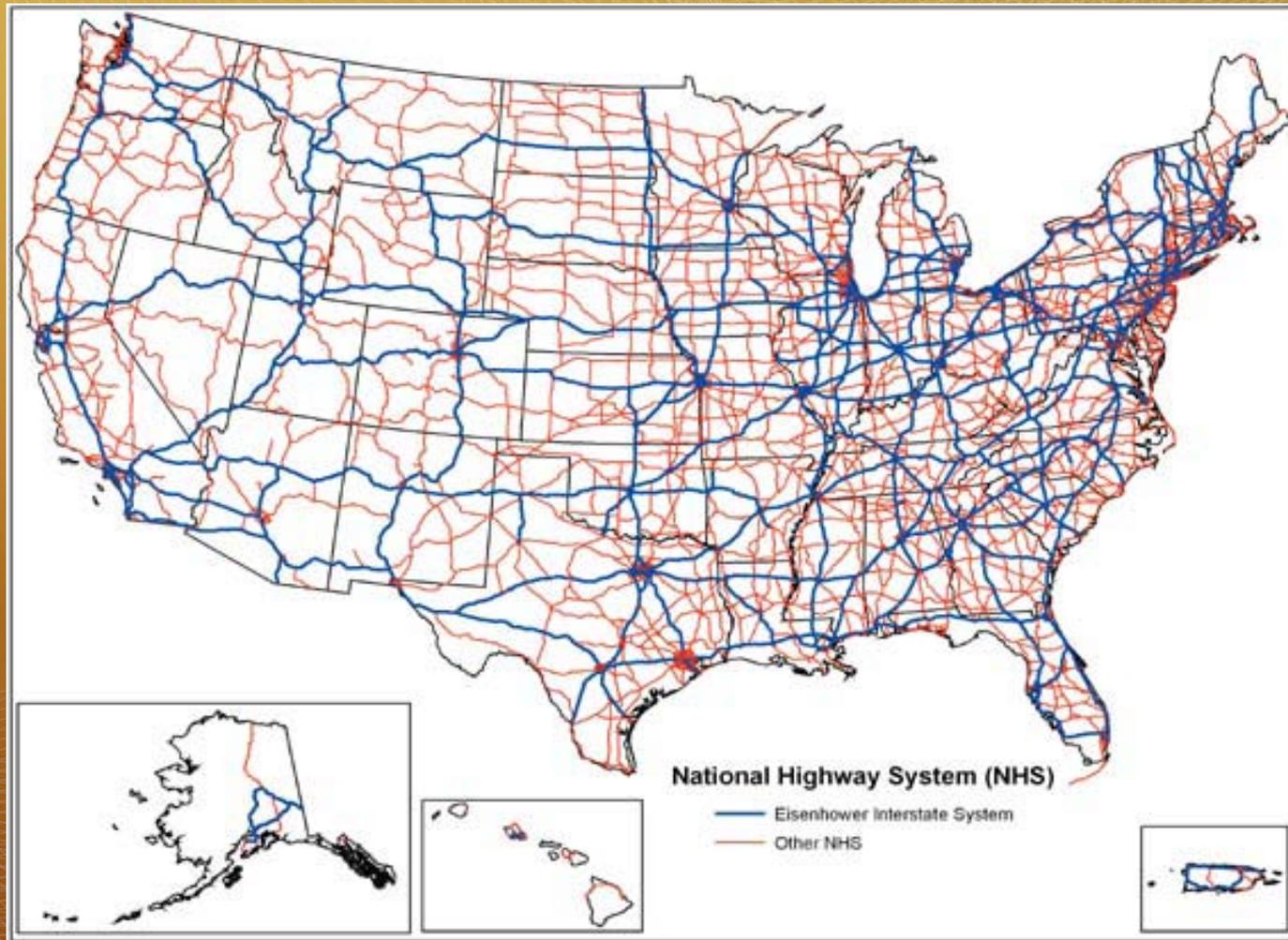
Innovation

Human Capital

Quality Places



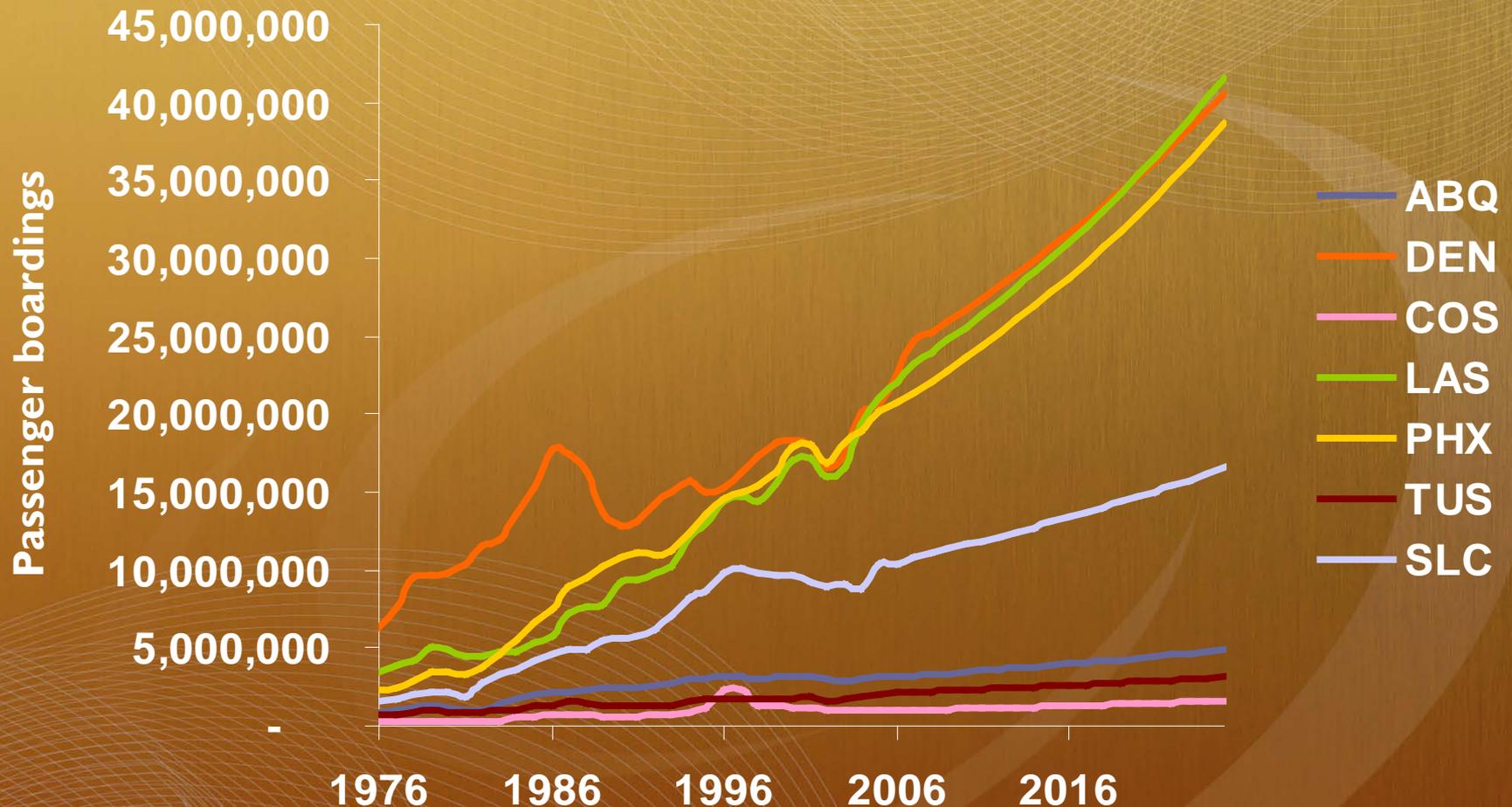
Given their newness, the Mountain megas are undersupplied with Interstates



The Mountain megas are also undersupplied with intercity rail



Passenger boardings at Las Vegas, Denver, and Phoenix are expected to skyrocket



Total TOD Investment Zones in the Intermountain West by 2010

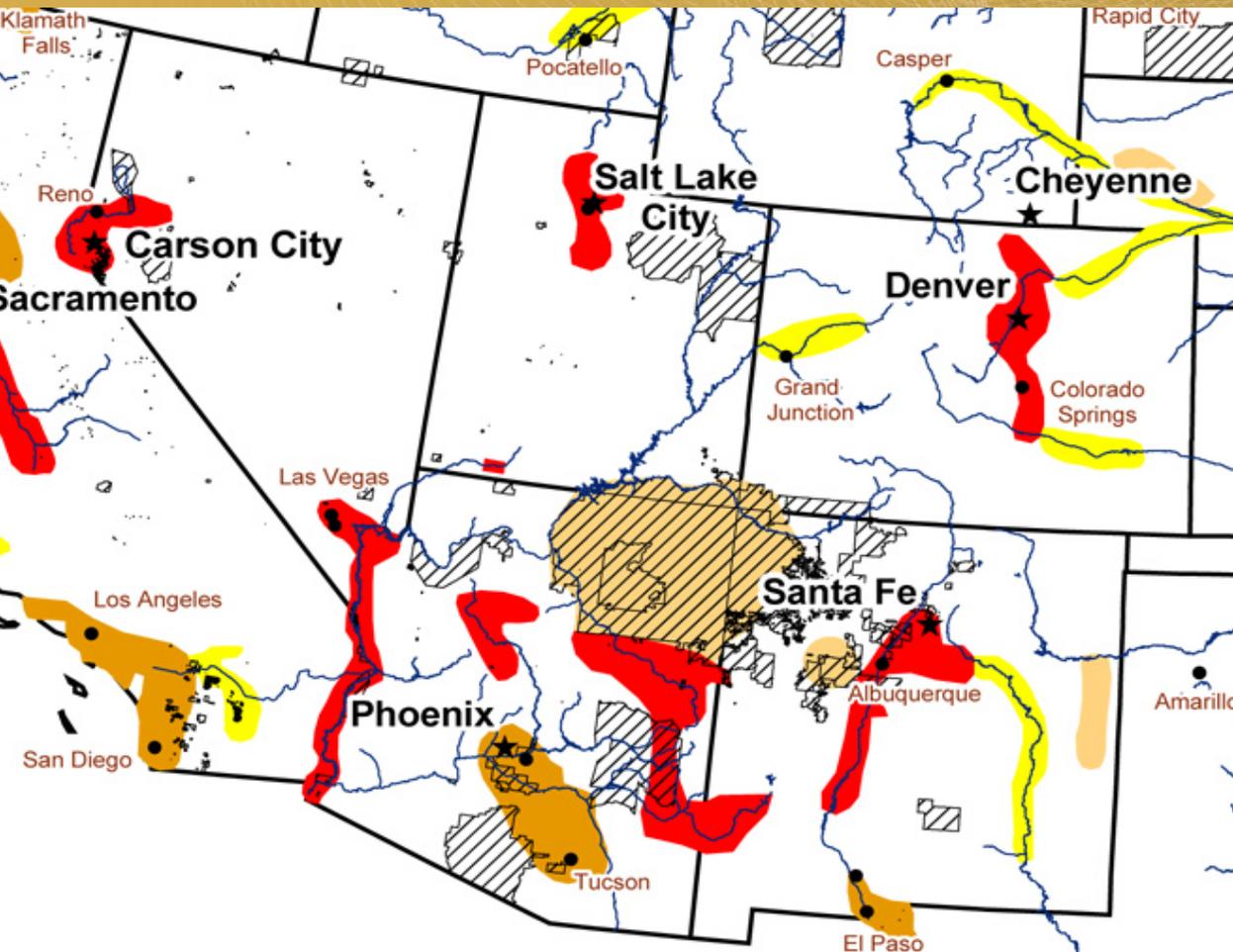
City	# of Stations	Sq. Miles
Denver	59	68.7
Las Vegas	15	17.5
Phoenix	27	31.4
Salt Lake	25	29.1
Sum	126	146.8



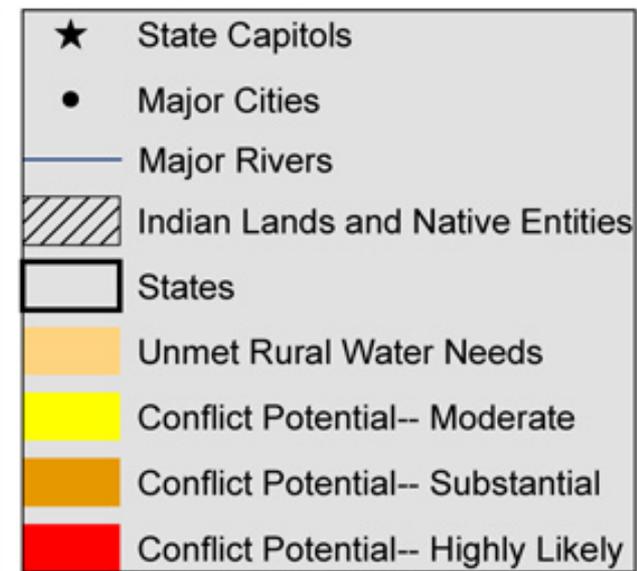
The Intermountain West could become the nation's alternative energy breadbasket



Climate change may exacerbate water conflict in an already arid region



I am currently working on a book on water policy in the “wet and dry” sunbelts for the MacArthur Foundation



Infrastructure

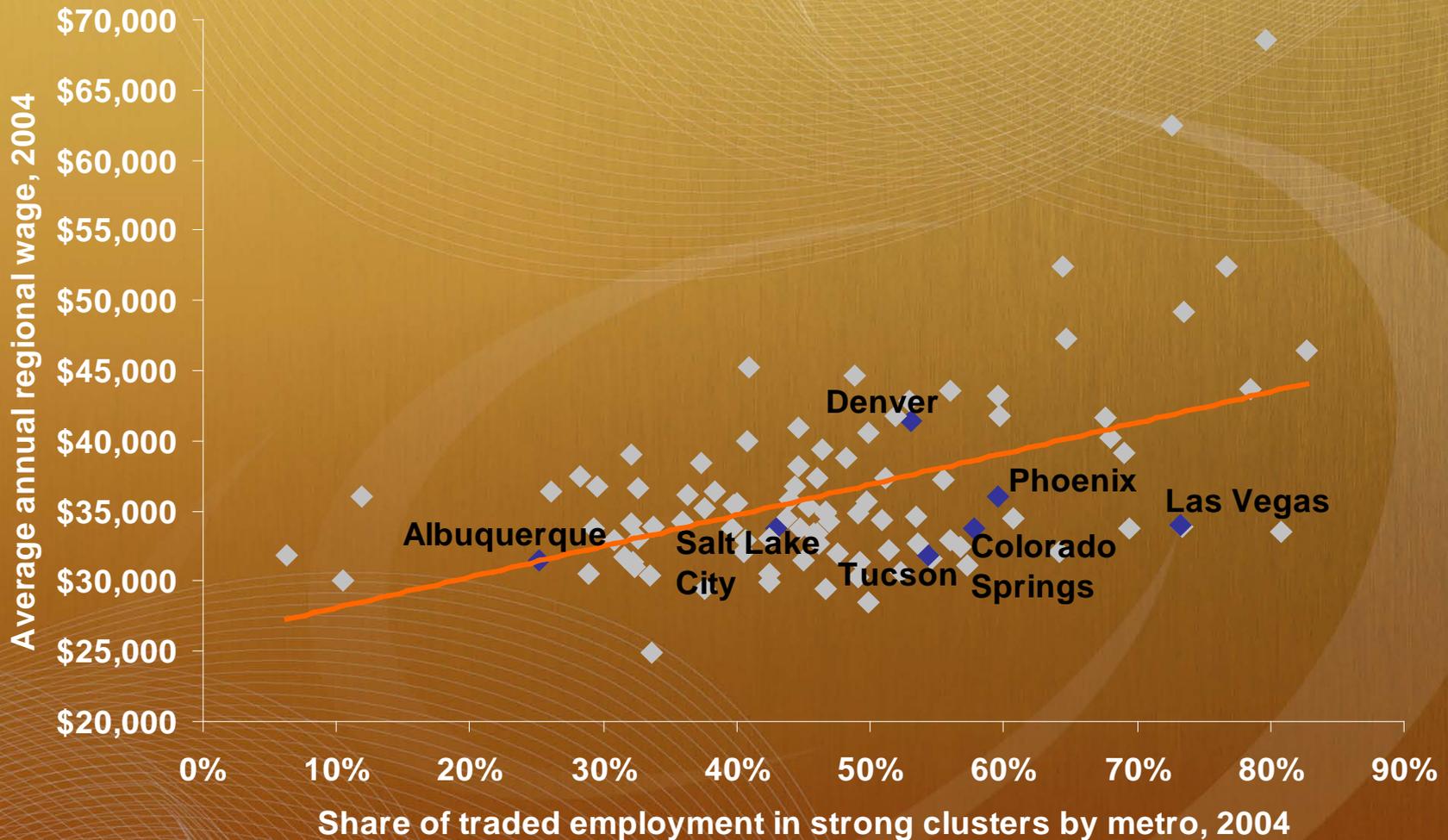
Innovation

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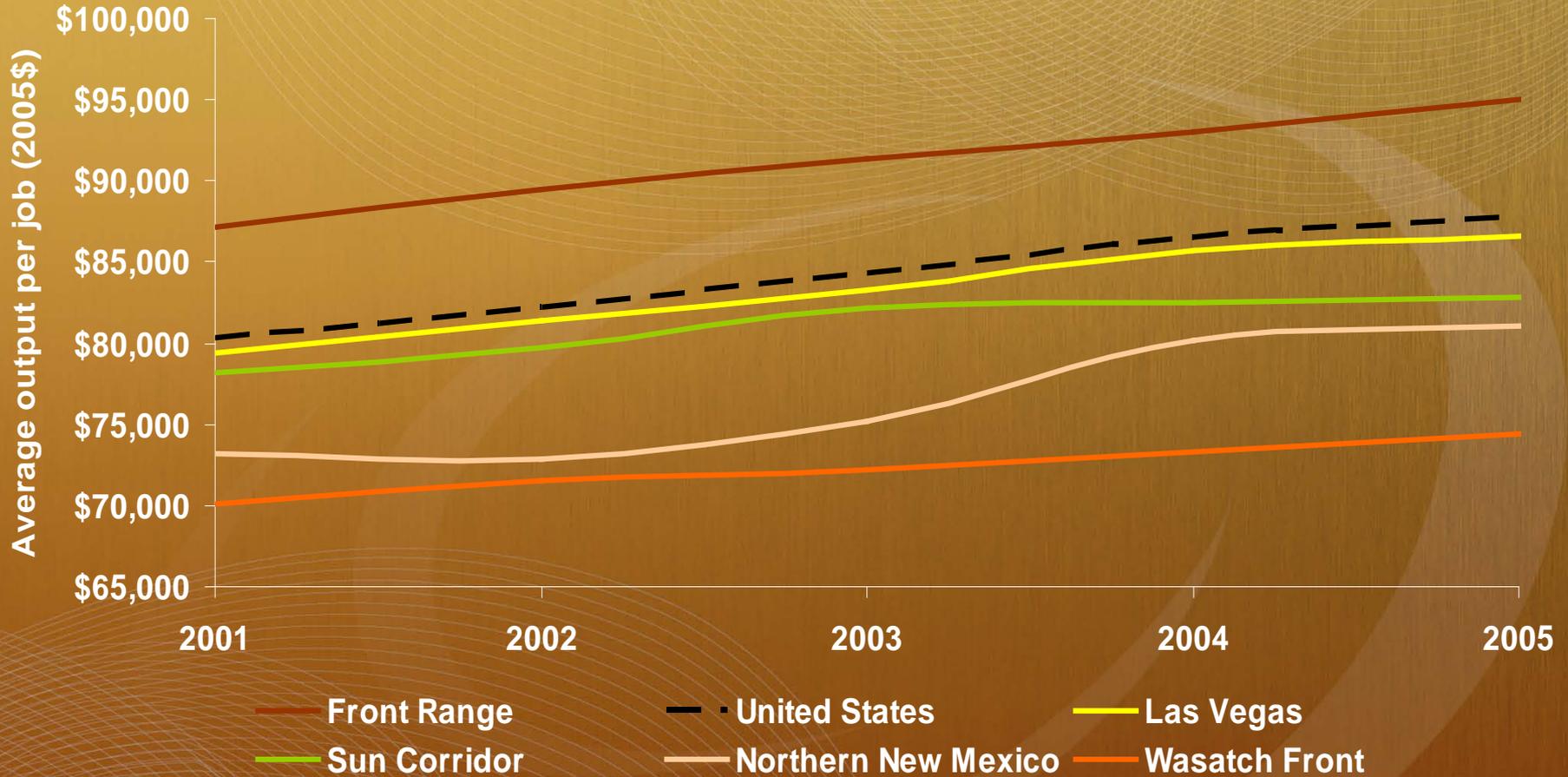
Quality Places



Many metros are underperforming as generators of high wages—but not Denver



Labor productivity trails the national average in all megas, except in the Front Range



Infrastructure

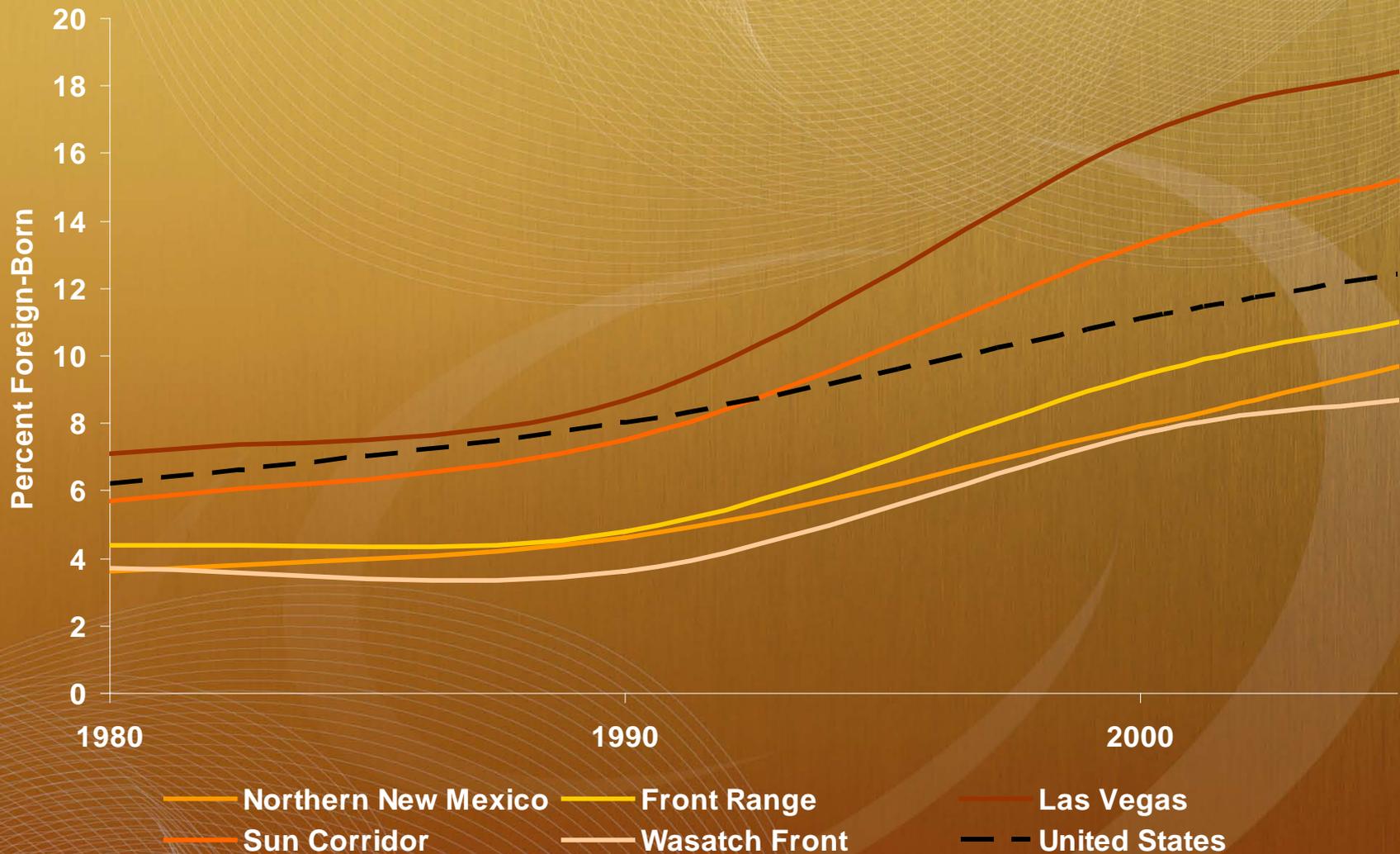
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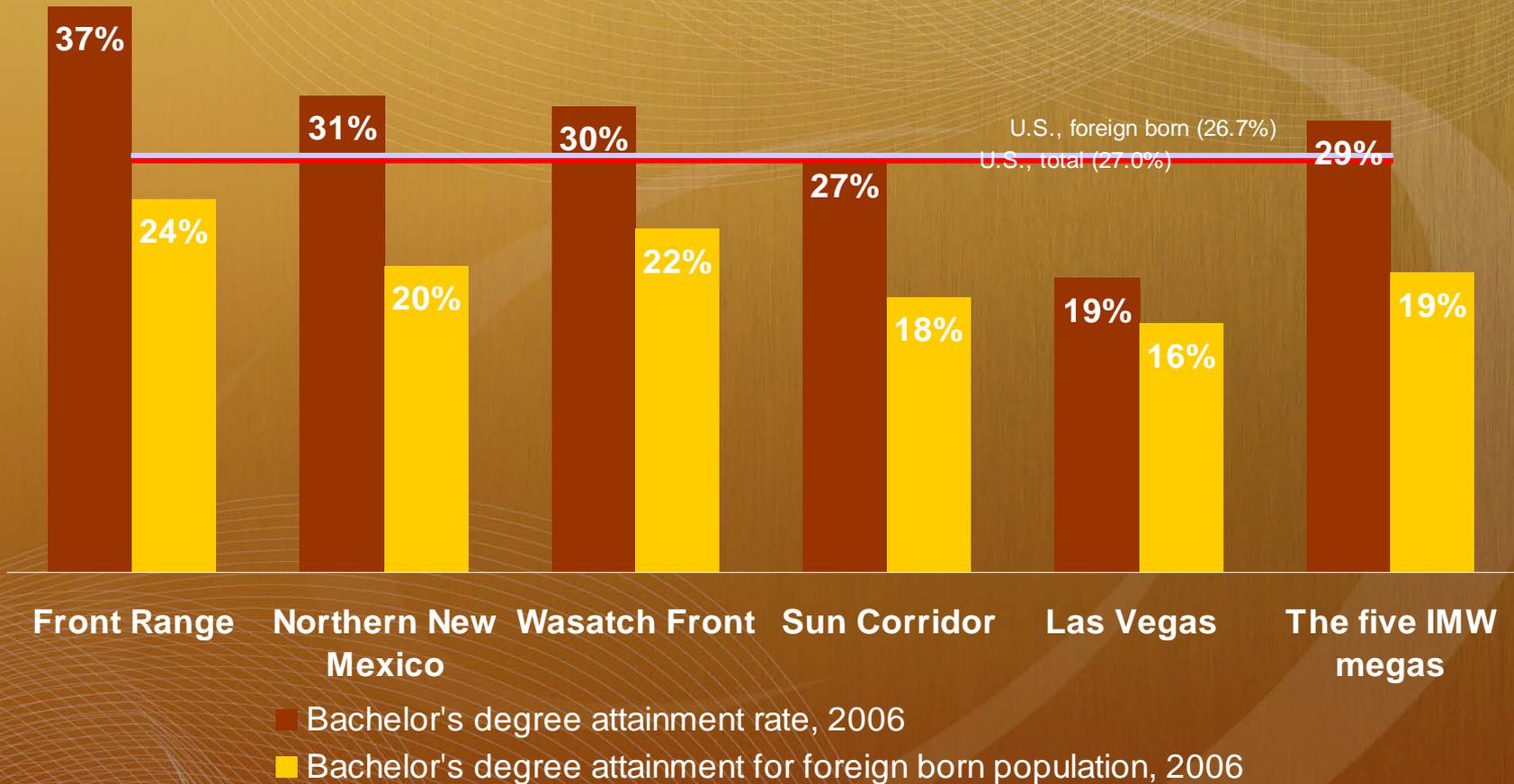
Quality Places



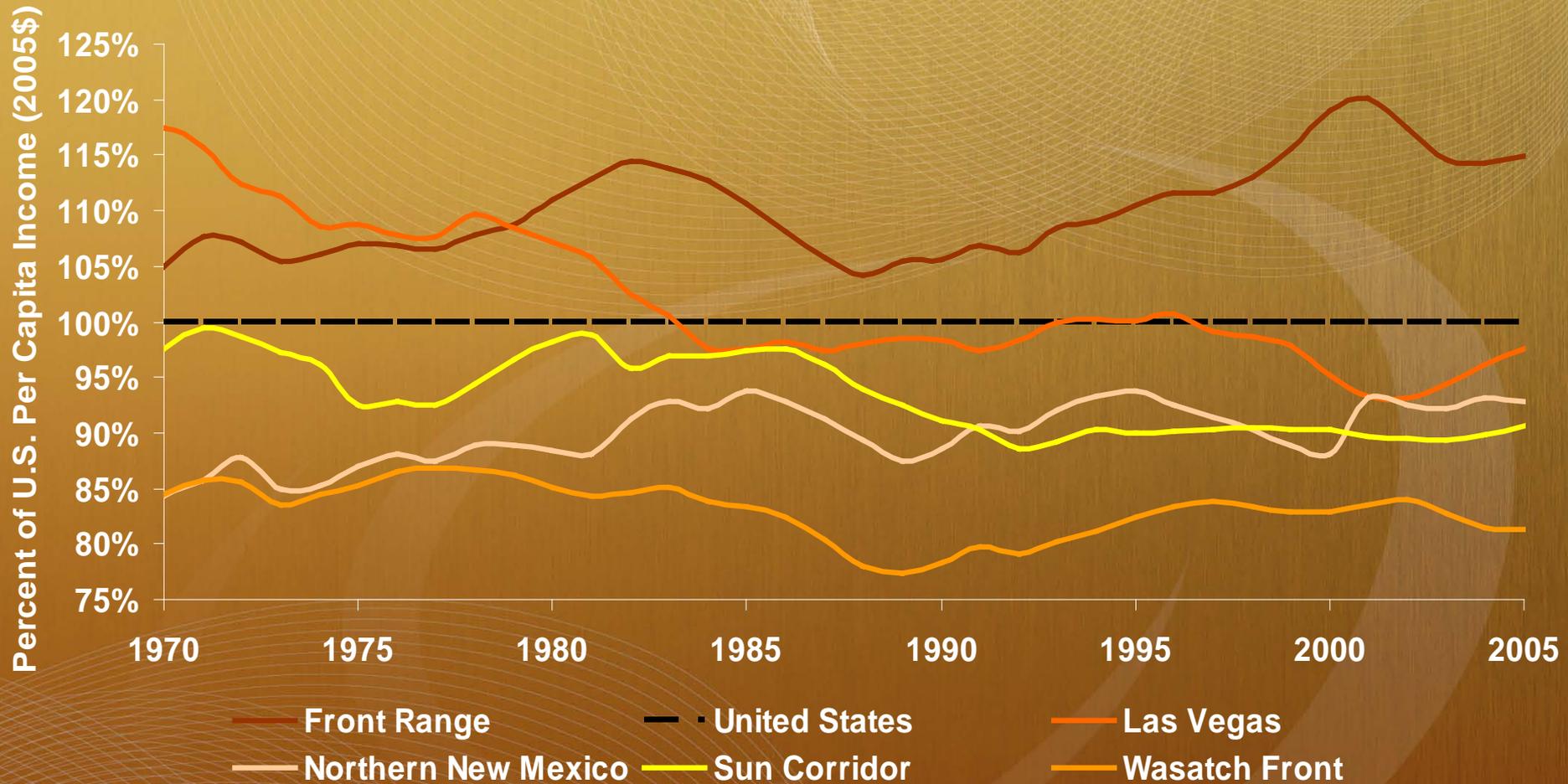
Immigration is increasing the share of foreign-born residents



Immigrants have less education than the full population—But the Front Range leads



Per capita income also trails the national average, except in the Front Range



The region's metros are not as globally connected as other U.S. metros—But Denver is in the lead

Selected metros ranked according to Global Network Connectivity Score

Metro	Global Network Connectivity Rank
Miami	5
Atlanta	6
Dallas	9
Houston	10
Denver	12
Portland, OR	18
Indianapolis	21
Kansas City	22
Phoenix	25
Las Vegas	36

The Front Range is the Intermountain West's most globally integrated mega

Global Integration Zones of the Intermountain West

Rank	Mega	Top 30 GNC Rank (1)	Top Global Airport (2)	Top Linked Airport (3)	Export Value (4)	Per Capita Exports (5)
1	Front Range	12	7	--	8.5	\$ 2,235
2	Sun Corridor	25	8	--	14.2	\$ 2,647
3	Las Vegas	36	5	9	1.1	\$ 497
4	Wasatch Front	--	19	--	6.7	\$ 3,003
5	Northern N.M.	--	--	--	2.3	\$ 2,257

Notes: (1) GNC score measures integration in the global producer service economy. London GNC score = 1.00. Source: Taylor, Peter J and Robert E Lang. 2005. "U.S. Cities in the 'World City Network'." Washington: Brookings Institution. (2) Top 30 ranked world airport based on traffic movements in 2006 (take offs and landings per year). Source: Airports Council International. 2007. "Annual Traffic Data." (www.aci.aero/cda/aci_common/display/main/aci_content07_c.jsp?zn=aci&cp=1-5-54_666_2__ [April 2, 2008]). (3) U.S. rank based on analysis of connectivity to the global airport matrix. Source: Witlox, Fred and Ben Derudder. 2007. "Airline Passenger Flows through Cities: Some New Evidence." In Taylor, Derudder and Saey, eds., Cities in Globalization: Practices, Policies and Theories. London: Routledge. (4) Figures are in billions of dollars in 2006 and are based on the ZIP code entered on export declarations. Source: International Trade Administration. 2006. "Metro Exports Value." (www.ita.doc.gov/td/industry/otea/metro/Reports/2006/mv_value06.html [April 2, 2008]). (5) Per capita figure derived from dividing export figure (4) by 2006 megapolitan population.



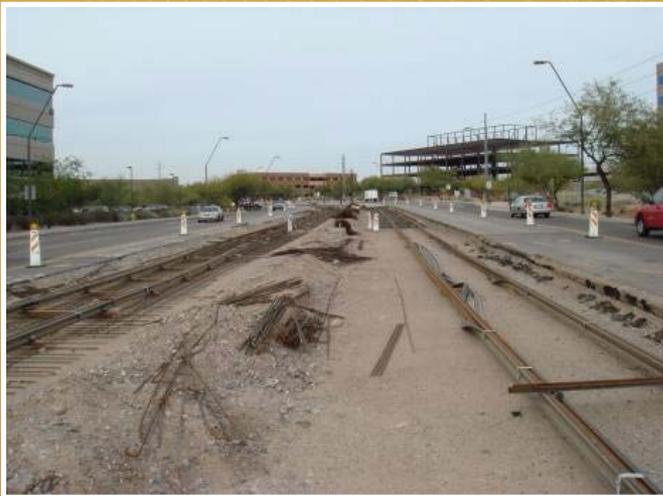
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Transit is underdeveloped but there's a rail boom in the Mountain megas



There is relatively high density development—but no mixing of uses which depresses urban vitality



Mountain Megas

I

Context

II

Mega-trends

III

Emerging challenges and opportunities

IV

Projected growth in the West



Front Range Growth to 2040

Front Range

Population Growth, 2000-2040 (in thousands)

County	2000	2005	2010	2015	2020	2025	2030	2035	2040	Change
Larimer	253	276	306	336	368	399	431	463	495	96%
Boulder	294	311	335	360	385	410	435	461	487	65%
Broomfield (not in data set)										#DIV/0!
Weld	183	227	253	268	284	299	315	331	348	90%
Adams	366	418	469	514	559	605	651	698	745	104%
Arapahoe	492	527	574	623	673	723	774	825	877	78%
Denver	556	566	593	602	611	621	630	640	649	17%
Elbert	20	22	25	28	31	35	38	42	45	126%
El Paso	519	568	616	665	715	765	816	867	919	77%
Douglas	180	246	311	377	443	511	578	646	715	297%
Teller	21	21	23	26	29	32	35	38	40	96%
Park	15	17	18	20	22	24	26	28	30	101%
Jefferson	528	526	540	553	568	583	597	612	627	19%
Clear Creek	9	9	9	10	11	12	13	14	14	55%
Gilpin	5	5	6	6	7	8	9	10	11	129%
Metro	3,442	3,740	4,078	4,388	4,705	5,027	5,350	5,675	6,002	74%

Source: Woods and Poole, 2008



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Las Vegas Growth to 2040

Las Vegas

Population Growth, 2000-2040 (in thousands)

County	2000	2005	2010	2015	2020	2025	2030	2035	2040	Change
Nye	33	40	46	51	55	60	64	69	74	124%
Clark	1,393	1,709	1,984	2,236	2,494	2,754	3,017	3,281	3,548	155%
Mohave	156	185	213	242	272	303	333	363	394	152%
Metro	1,583	1,934	2,243	2,529	2,821	3,117	3,415	3,714	4,016	154%

Source: Woods and Poole, 2008



Northern New Mexico Growth to 2040

Northern New Mexico Population Growth, 2000-2040 (in thousands)

County	2000	2005	2010	2015	2020	2025	2030	2035	2040	Change
Rio Arriba	41	41	43	47	51	54	58	62	66	60%
Taos	30	31	33	37	40	43	46	50	53	76%
Los Alamos	18	19	19	20	20	21	22	22	23	27%
Sandoval	91	106	128	146	163	181	198	215	233	155%
Sante Fe	130	140	152	167	183	199	215	231	247	90%
Bernalillo	557	608	652	692	733	775	817	860	903	62%
Valencia + Cibola	92	96	105	117	129	140	152	163	175	90%
Torrance	17	17	17	19	20	22	23	25	26	55%
Metro	977	1,056	1,151	1,244	1,339	1,435	1,531	1,628	1,726	77%

Source: Woods and Poole, 2008



Sun Corridor Growth to 2040

Sun Corridor

Population Growth, 2000-2040 (in thousands)

County	2000	2005	2010	2015	2020	2025	2030	2035	2040	Change
Yavapai	169	198	230	260	289	319	350	380	410	143%
Maricopa	3,098	3,647	4,122	4,530	4,946	5,366	5,788	6,212	6,639	114%
Pinal	181	237	322	360	398	437	475	514	553	205%
Pima	849	927	1,025	1,123	1,223	1,325	1,426	1,528	1,631	92%
Santa Cruz	39	41	45	49	54	58	62	66	71	83%
Cochise	118	126	136	150	164	178	192	206	220	87%
Metro	4,453	5,175	5,880	6,472	7,074	7,682	8,293	8,907	9,524	114%

Source: Woods and Poole, 2008



Wasatch Front Growth to 2040

Wasatch Front

Population Growth, 2000-2040 (in thousands)

County	2000	2005	2010	2015	2020	2025	2030	2035	2040	Change
Franklin	11	12	13	14	14	15	16	17	18	61%
Cache	92	105	122	142	163	184	205	225	246	167%
Weber	197	214	229	241	254	267	281	295	309	57%
Morgan	7	8	9	9	10	11	12	12	13	85%
Davis	240	270	311	350	389	428	468	507	546	127%
Summit	30	35	39	45	51	56	62	68	74	146%
Salt Lake	901	964	1,057	1,138	1,222	1,308	1,395	1,483	1,572	74%
Wasatch	15	19	23	27	32	36	40	44	48	213%
Utah	372	455	531	610	689	768	847	925	1,004	170%
Juab	8	9	10	12	13	15	16	17	19	128%
Tooele	42	50	61	72	83	93	104	114	125	200%
Box Elder	43	46	50	53	57	61	65	68	72	69%
Metro	1,959	2,186	2,455	2,714	2,977	3,242	3,509	3,777	4,046	107%

Source: Woods and Poole, 2008



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Bottom line

- The IMW Megacities grow from nearly 16 million in 2010 to over 25 million by 2040
- The IMW Megacities had nearly 12.5 million residents in 2000.
- Thus the region's Megacities double between 2000 and 2040.
- This growth outpaces the US—Which is a fast growing nation
- Are we ready?



For More Information

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www.brookings.edu/metro/intermountain_west.aspx



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