

ARC's 2014 Population Estimates: Steady as She Goes

August 2014

Atlanta Regional Commission

For more information, contact:

mcarnathan@atlantaregional.com

Population Estimates: Recent History

	1970	1980	1990	2000	2010	2013	2014	Average Annual Change 2010-2014	Average Annual Change 1990-2010
Atlanta Region	1,500,823	1,896,182	2,557,800	3,429,379	4,107,750	4,219,600	4,272,300	41,138	77,498
Cherokee	31,059	51,699	91,000	141,903	214,346	223,300	227,500	3,289	6,167
Clayton	98,126	150,357	184,100	236,517	259,424	263,700	264,700	1,319	3,766
Cobb	196,793	297,718	453,400	607,751	688,078	707,500	717,100	7,256	11,734
DeKalb	415,387	483,024	553,800	665,865	691,893	706,600	712,900	5,252	6,905
Douglas	28,659	54,573	71,700	92,174	132,403	134,700	136,000	899	3,035
Fayette	11,364	29,043	62,800	91,263	106,567	108,200	109,500	733	2,188
Fulton	605,210	589,904	670,800	816,006	920,581	945,400	958,100	9,380	12,489
Gwinnett	72,349	166,808	356,500	588,448	805,321	832,200	844,100	9,695	22,441
Henry	23,724	36,309	59,200	119,341	203,922	211,300	214,500	2,645	7,236
Rockdale	18,152	36,747	54,500	70,111	85,215	86,700	87,900	671	1,536
City of Atlanta	495,039	424,922	415,200	416,474	420,003	422,800	426,900	1,724	240

The 10-county Atlanta region has averaged some 41,000 new residents each year since 2010, which is dramatically lower than the annual growth experienced between 1990 and 2010. **Over the past year (April 1, 2013 and April 1, 2014), however, the region added 52,700 new residents. This year-over-year change is the largest single-year growth since the Great Recession.** Between 2010 and 2013, the region averaged 37,300 new residents each year, so population growth is on the upswing.

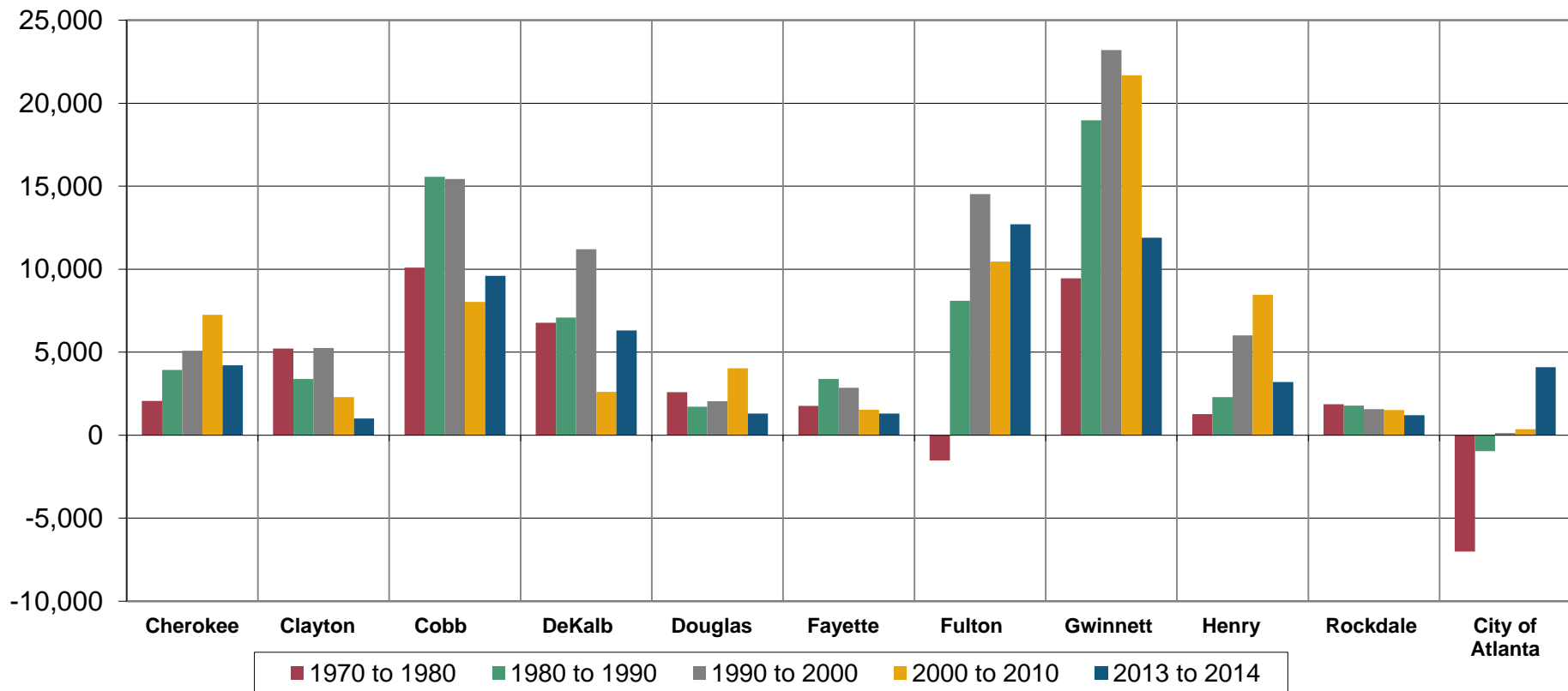
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With the economy improving and jobs more plentiful, **population growth has rebounded somewhat, but growth still lags the booming years of the 1990s and 2000s.** Since 2010, **Gwinnett County has led the region in average annual growth, adding 9,700 new residents each year.** This growth, as in all jurisdictions except the City of Atlanta, is well below the average annual change experienced between 1990 and 2010. As for last year, Fulton added the most new residents, up 12,700, then Gwinnett (+11,900), Cobb (+9,600) and DeKalb (+6,300).

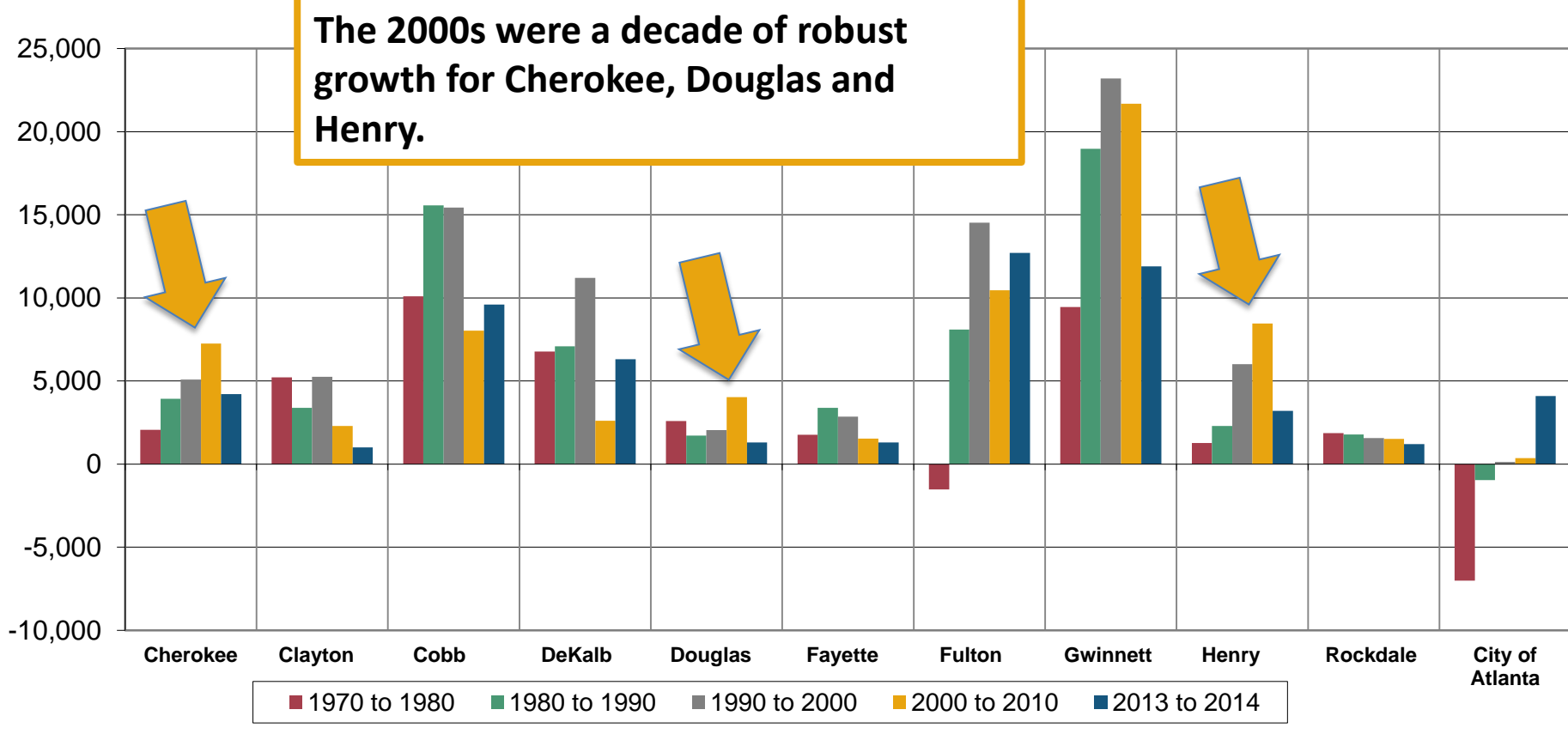


Population Estimates: Recent History



Similar to the table on the previous slide, this chart shows how each county and the City of Atlanta has grown over the past 40 years. As you can see, each county “took off” at different points of time. Generally speaking, though, the more rural counties of Cherokee, Douglas and Henry experienced their booms last decade, while the more urban counties closer to the core had their booms during the 1990s

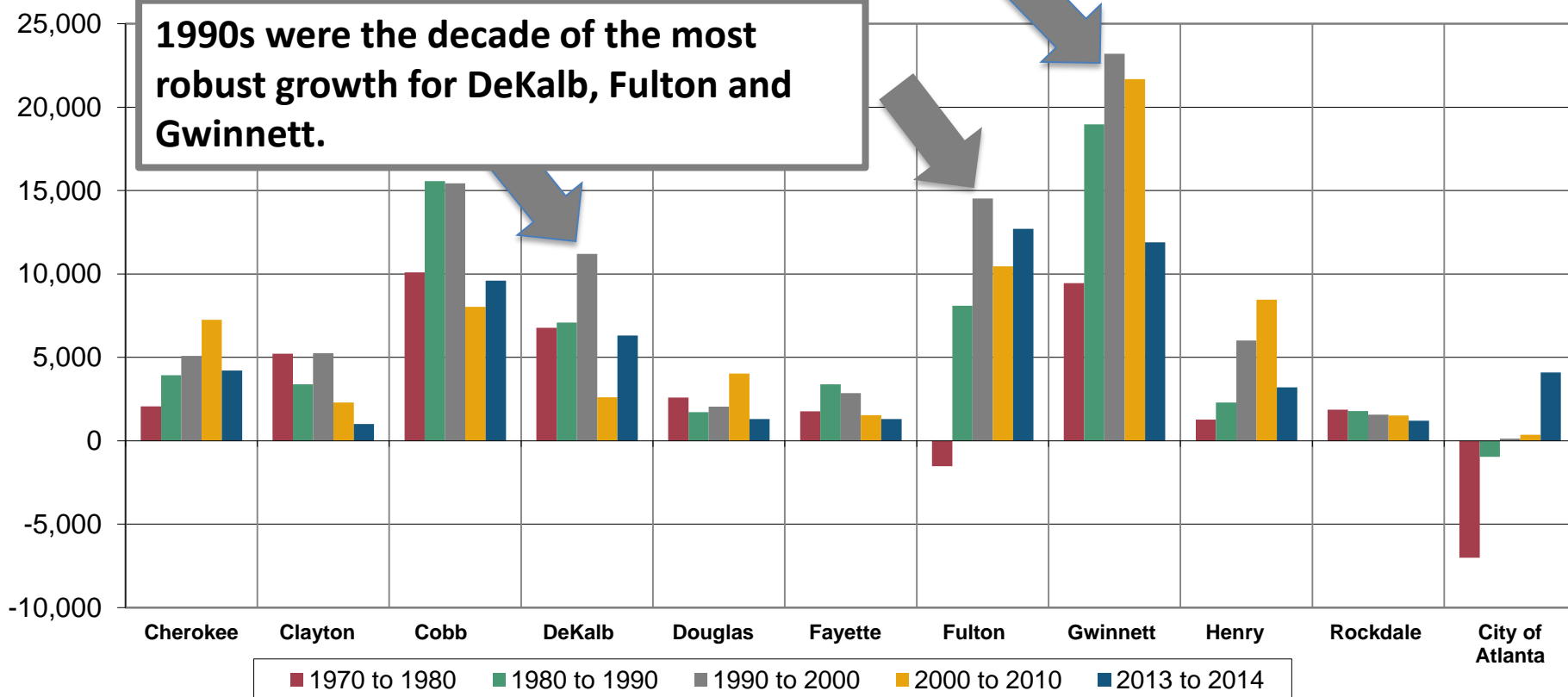
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Source: ARC Population Estimates Program

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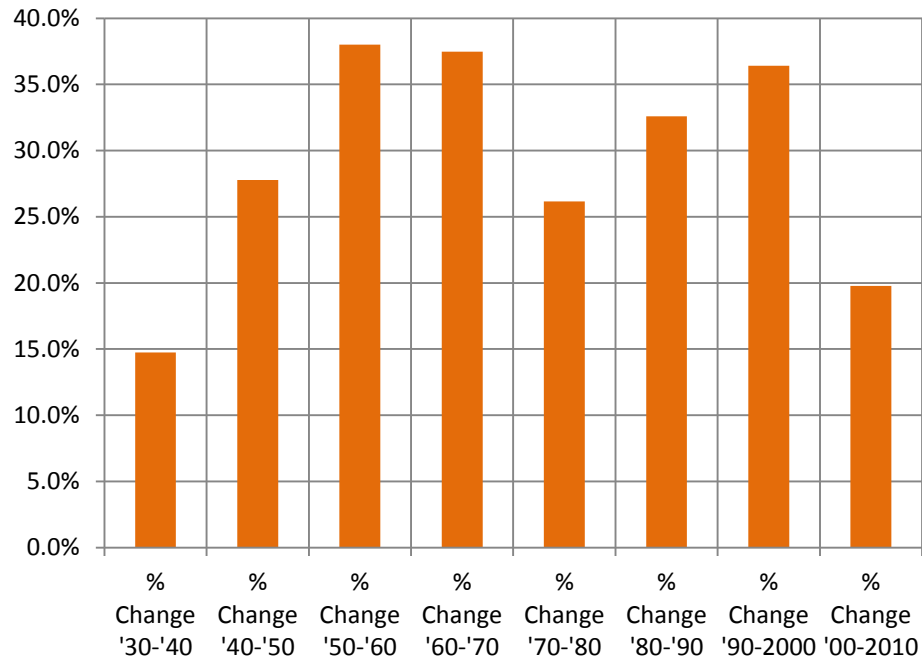


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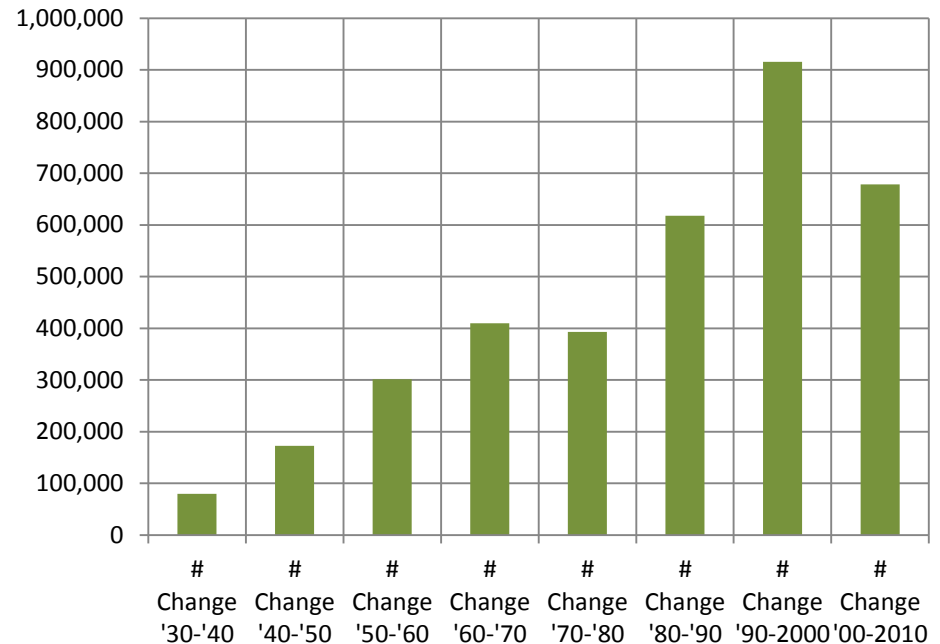
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Population Growth Through the Decades

Percent Change by Decade: 10-County ARC



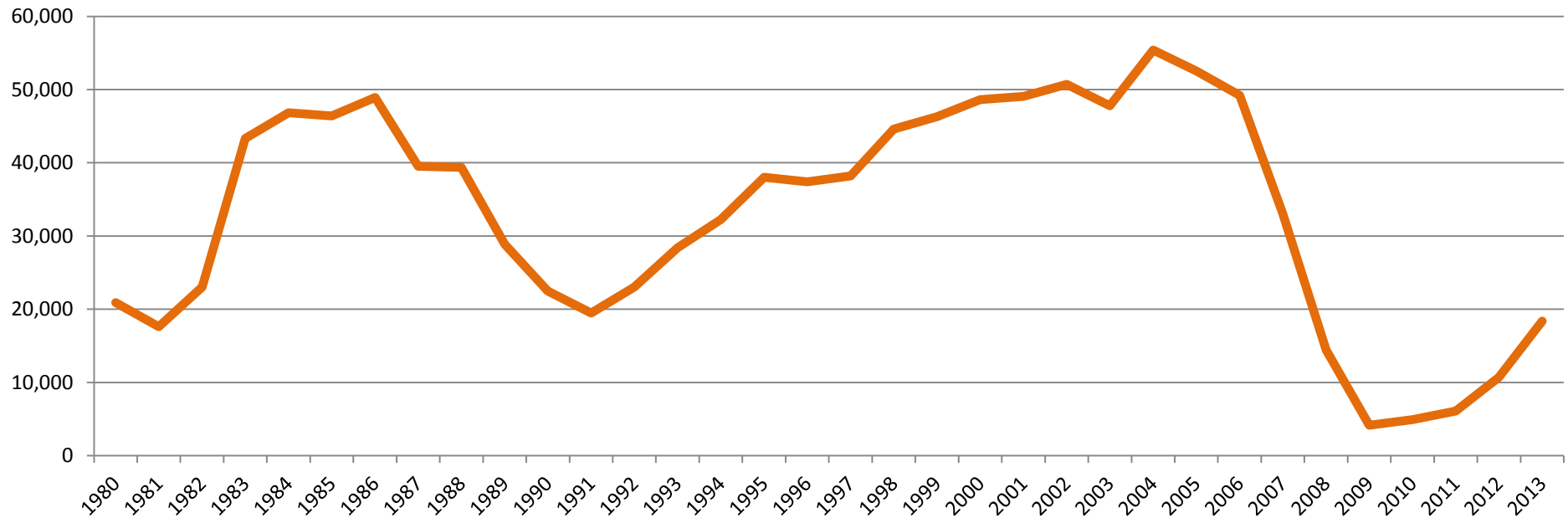
Raw Change by Decade: 10-County ARC



The 1990s were booming, as the 10-county Atlanta region added more than 900,000 new residents during the decade, by far the largest net gain in population when compared to other decades spanning back to the 1930s. On a percentage basis, however, the 1950s had the largest gains, with the region growing by some 38 percent between 1950 and 1960.

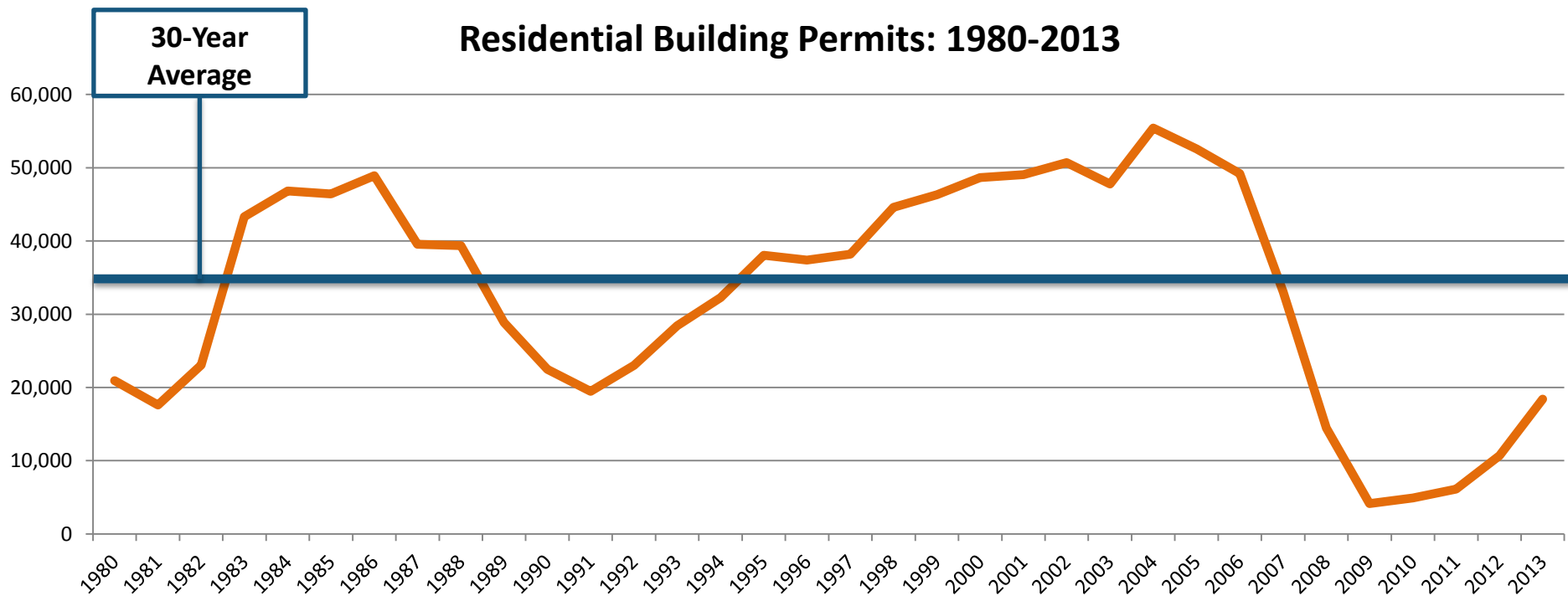
Building Permits Still Low Compared To Historical Average

Residential Building Permits: 1980 - 2013



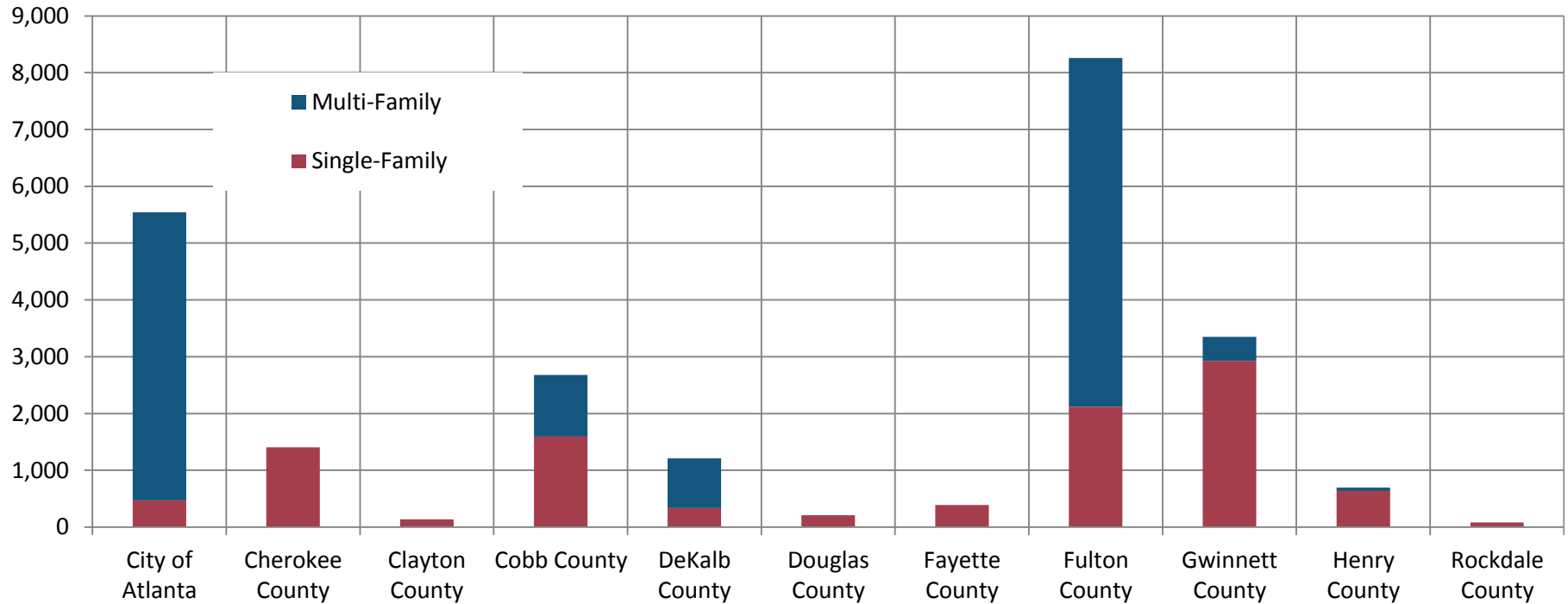
While ARC looks at several sources of data in developing our annual population estimates, examining building permit activity is a primary input. The lagging building permit activity of the last few years helps explain why population growth has been so sluggish. **But, in 2013, there were 18,400 new building permits in the 10-county region, which was 5,500 higher than the number permitted in 2012. As building permit activity ticks back up, so does population growth.**

Building Permits Still Low Compared To Historical Average



But, despite the increase last year, building permit activity is still at near-record lows. Between 1980 and 2012, the 10-county Atlanta region averaged 35,000 residential permits each year. In 2013, that number was 18,400, almost half of the 30-year average. So while last year's population growth of 52,700 new residents was the highest annual increase since the Great Recession, that growth is less than half of what the region experienced in the late 1990s and early 2000s.

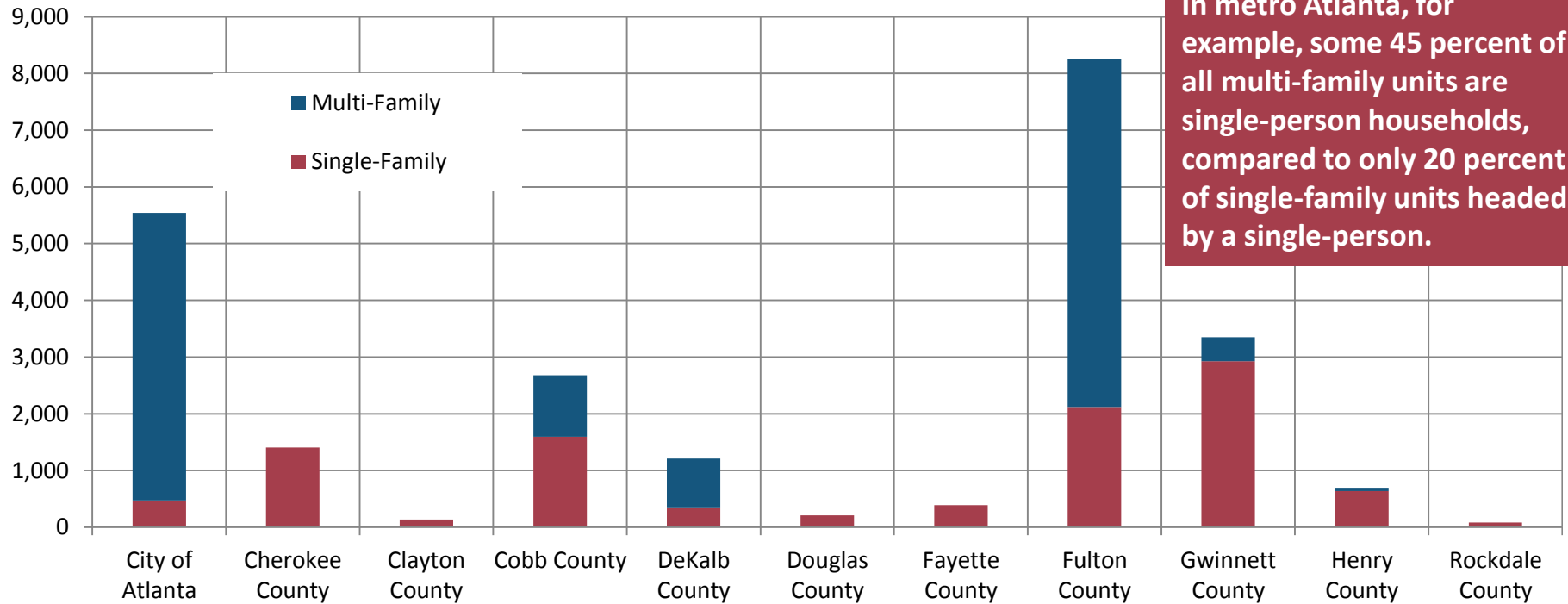
Building Permits by Jurisdiction, 2013



In addition to looking at overall residential permit activity, **we also look at the type of unit permitted. Multi-family units have smaller household sizes and higher vacancy rates than do single-family homes.** So, in Fulton County (which includes the City of Atlanta totals), for example, the vast majority of new units permitted were multi-family. In contrast, the vast majority of new units permitted in Gwinnett were single-family. Thus, even though Fulton permitted more than twice the number of units last year than did Gwinnett, (8,300 to 3,300), Fulton gained only 800 more new residents than did Gwinnett because of the large differences in household sizes between single-family and multi-family units.



Building Permits by Jurisdiction, 2013



In metro Atlanta, for example, some 45 percent of all multi-family units are single-person households, compared to only 20 percent of single-family units headed by a single-person.

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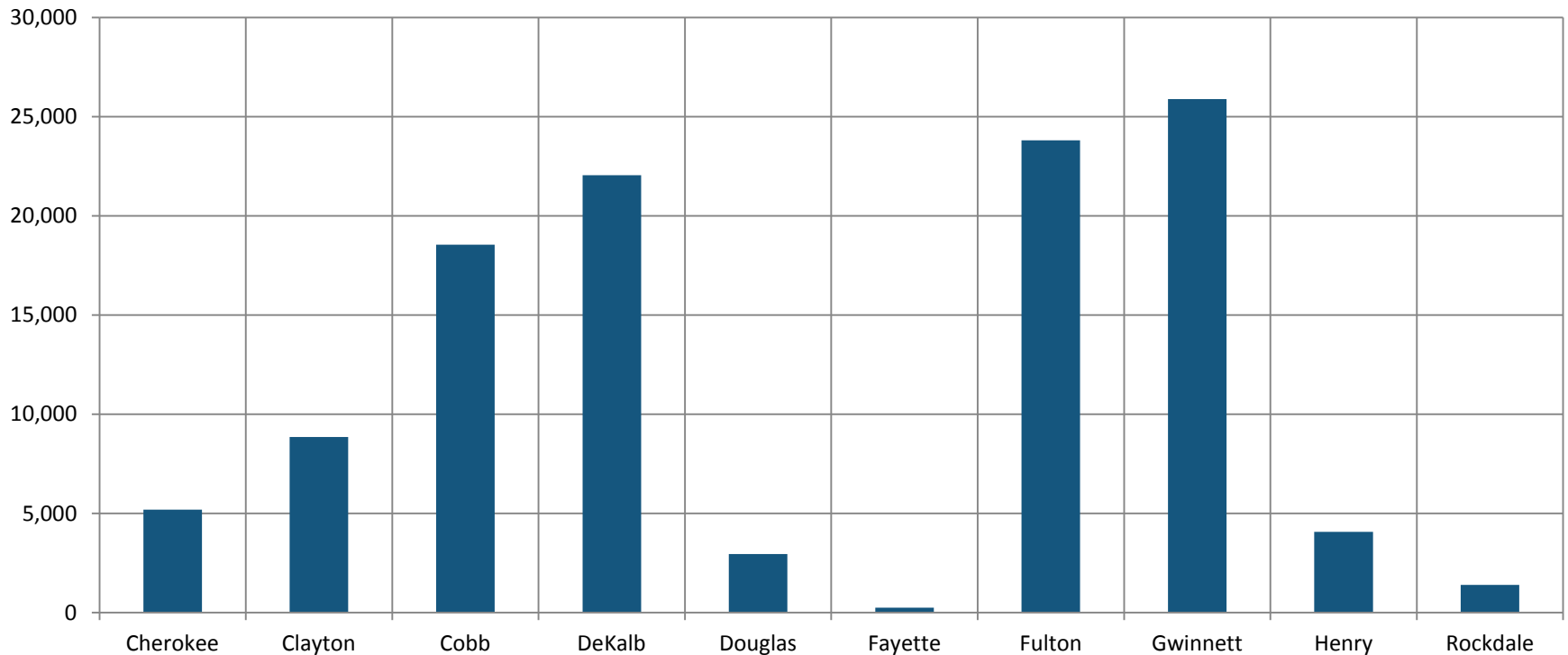
More Occupied Residences, Fewer Vacancies = Better Population Growth

County	Occupied Residences, 2013 (Q1)	Occupied Residences, 2014 (Q1)	Change in Occupied Residences, 2013-2014
Cherokee	97,280	98,168	888
Clayton	120,636	121,125	489
Cobb	315,785	317,952	2,167
DeKalb	341,012	342,358	1,346
Douglas	59,929	59,997	68
Fayette	45,595	45,762	167
Fulton	487,751	489,491	1,740
Gwinnett	337,895	339,715	1,820
Henry	91,089	91,257	168
Rockdale	36,973	37,021	48
Total, ARC 10-Counties	1,933,945	1,942,846	8,901

	Vacant Residences, 2013 (Q1)	Vacant Residences, 2014 (Q1)	Change in Vacant Residences, 2013-2014
Cherokee	2,474	2,185	(289)
Clayton	7,762	7,439	(323)
Cobb	10,685	9,510	(1,175)
DeKalb	14,388	12,935	(1,453)
Douglas	2,427	2,232	(195)
Fayette	1,160	1,025	(135)
Fulton	23,654	22,339	(1,315)
Gwinnett	7,836	6,668	(1,168)
Henry	2,953	2,991	38
Rockdale	1,568	1,369	(199)
Total, ARC 10-Counties	74,907	68,693	(6,214)

In addition to building permits, ARC looks at several other sources of data that serve as an additional “check” to the annual population estimates. **One such check is assessing occupancy and vacancy status of the existing housing stock, using U.S. Postal Service (USPS) data.** The USPS data is hard to interpret, because they employ three classifications to characterize residences: Occupied, Vacant and “No-Stat.” As can be seen by the tables above, there are more occupied residences and fewer vacancies this year when compared to last, which translates into more robust population growth. But each county has thousands of residences with the “no-stat” tag, which, according to USPS, could mean either a large number of long-term vacancies, or a high amount of new construction. But, when combined with other sources of data used, the increase in occupied residences and decrease in vacancies translates into decent population growth.

Natural Increase (Births minus Deaths), 2010-2013



Looking at natural increase is another “check” ARC employs to develop annual population estimates. Population grows in two ways – natural increase and in-migration. ARC looks at building permits as a proxy for in-migration (with the assumption that new residents need a place to live). For natural increase, ARC looks at recent trends in births and deaths. **As the chart shows, Gwinnett and Fulton have had the largest natural increases between 2010-2013.** As these two counties have also seen the largest increases in building permit activity, they have the highest population growth estimates. DeKalb County, too, has seen a large natural increase since 2010, but since building permit activity is sluggish in DeKalb, practically all of its growth is coming from natural increases, rather than from in-migration.