Tracking New Jersey's Development Patterns

New NJ DEP Land Use Data for Better Analysis, Planning & Conservation

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New Jersey Future
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Our mission:

- Revitalize cities
- Preserve open space
- Keep housing affordable
- Encourage transportation choices
Development and Preservation
Development and Preservation, 1986 to 2015

Development and preservation are both taking more NJ land off the market.

1986:
- Developed: 25.8%
- Still developable: 41.2%
- Preserved / constrained: 33.1%

1986-1995:
- Developed: 0.5%
- Still developable in 2015: 13.7%
- 1995-2007: 12.6%
- 2007-2015: 6.7%

1986-2015:
- Developed: 8.6%
- Developed 1995-2007: 4.0%
- Developed 2007-2015: 0.8%

Already developed in 1986: 25.8%
Already preserved / constrained in 1986: 33.1%
Development and Preservation, 1986 to 2015

Development and preservation are both taking more NJ land off the market.

1986:
- Still developable: 41.2%
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2015:
- Still developable: 13.7%
- Developed: 33.4%
- Preserved/Constrained: 52.9%
New Jersey is approaching full build-out, but not as rapidly as it was 20 years ago.
Rate of Land Development vs. Population Growth Rate

New population growth has been less land-hungry since 2007.
Since 2007, land development has decreased dramatically while NJ continues to absorb new population growth. Where did the new residents go, that they used so little land?
REDEVELOPMENT
Prior to 2007, municipalities that were already at least 90 percent built-out were mostly stagnant or actually losing population. But built-out places have dominated growth since the Great Recession.
Redevelopment Is The New Normal

Residential COs Issued in Built-Out (≥ 90%) Municipalities as % of State Total, 2000-2007 vs. 2008-2018

From 2000 to 2007, a little over 1/3 of residential building activity took place in built-out places. From 2008 to 2018, it was nearly 2/3.

23% of the dark blue is just Newark and Jersey City alone (vs 19% for ’08–’18)
THANKS, MILLENNIALS!
(AND GENX)
Millennials Moving Into Town

How the Great Reset Has Already Changed America

In the wake of the recession, cities and suburbs are being hived into giant city-states, with millions of people and billions -- even trillions -- of dollars of business rents.

The Downtown Renaissance Extends Its Reach

As U.S. downtowns are coming back, even in the Northeast, so are the rest of center cities.

Millennials don’t want to buy baby boomers’ sprawling, multi-bedroom homes, and it’s creating a major problem in the real-estate market.

No McMansions for Millennials

Here’s what Generation Y doesn’t want: formal living rooms, seeker bauhaus, dependence on a car.

In other words, they don’t want their parents’ homes.

From Ikea to Zipcar to Walmart, Advertisers Follow Consumers into Metropolitan Areas

Decades ago, people left cities for the suburbs to raise families and to live the American dream. Now we’re seeing “bright flight,” younger, educated Americans reversing the trend seen in their parents’ and grandparents’ generations.
Believe the hype: Millennials love compact, walkable urbanism

<table>
<thead>
<tr>
<th># of smart growth metrics on which muni scores well</th>
<th># of munis in category</th>
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Millennials are 25% more prevalent than statewide in municipalities scoring well on all 3 smart-growth metrics, and are less prevalent than statewide everywhere else.
% of pop age 22 to 34

- 13.0% or less
- 13.1% to 14.6%
- 14.7% to 16.3%
- 16.4% (NJ) to 17.9%
- 18.0% to 19.7%
- 19.8% or more

# of smart-growth metrics scoring well

- 0
- 1
- 2
- 3
Density History

Back to the Future
percentage of NJ's population living at various densities, 1930 to 2018

De-densification

- 1950 – 1980: suburbanization of population
- 1980 – early 2000s: suburbanization of jobs and the rise of the exurbs
- post-2008: the return of walkable urbanism
SMART GROWTH
SAVES LAND
## Dominant Land Cover (Non-Water)

(percent of total land area)

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<tr>
<th>county</th>
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Counties sorted in descending order of 2015 URBAN percent [not shown]
Plurality Land Use by Municipality

1986
25 newly URBAN

1995
13 newly URBAN

2007
7 newly URBAN

2015

Smart Growth Saves Land

NEW JERSEY FUTURE

AGRICULTURE
FOREST
URBAN
WETLANDS
PINELANDS BOUNDARY
Northeast Corridor and Monmouth County now mostly urbanized

Development of farmland and wetlands in central Jersey (E Hunterdon, S Somerset, N Mercer, S Middlesex), Philly exurbs (N Gloucester, Evesham Twp, N Burlington)

Some farmland reverting to forest in the Highlands and Sourlands (Hunterdon, Warren, Hopewell Twp in Mercer)

Little change in northern Highlands, except along I-80 in Morris

Very little change in Pinelands, and only at the edges
Recap:

- Remaining supply of developable land is shrinking fast
- Build-out is coming, as much (if not more) due to preservation/regulation as to new development
- “Redevelopment is the new normal”
- Redevelopment (and smart growth more generally) saves open space – and the Pinelands plan has worked
Thank you!

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