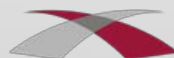


THE METROPOLIS OF INDIANA

WHAT IS INDIANA'S FUTURE?

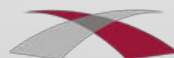
- The inter-related future of people, places and organizations
- Status quo is not an option
- What am I going to do?
 - Information / intuition
 - Describe the data / issues behind the maps
 - Different geographies
 - Arts Amenities and rural Indiana
 - Thoughts going forward



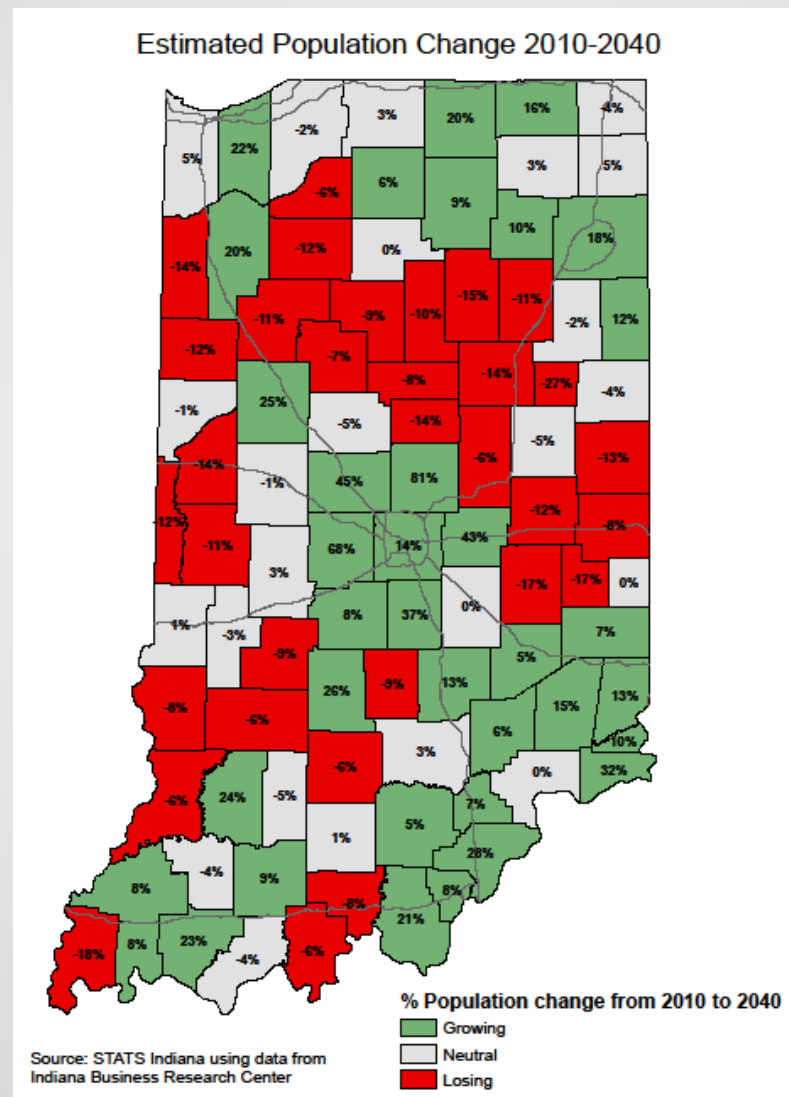
THE MIDWEST AND INDIANA

SOME PERSPECTIVE

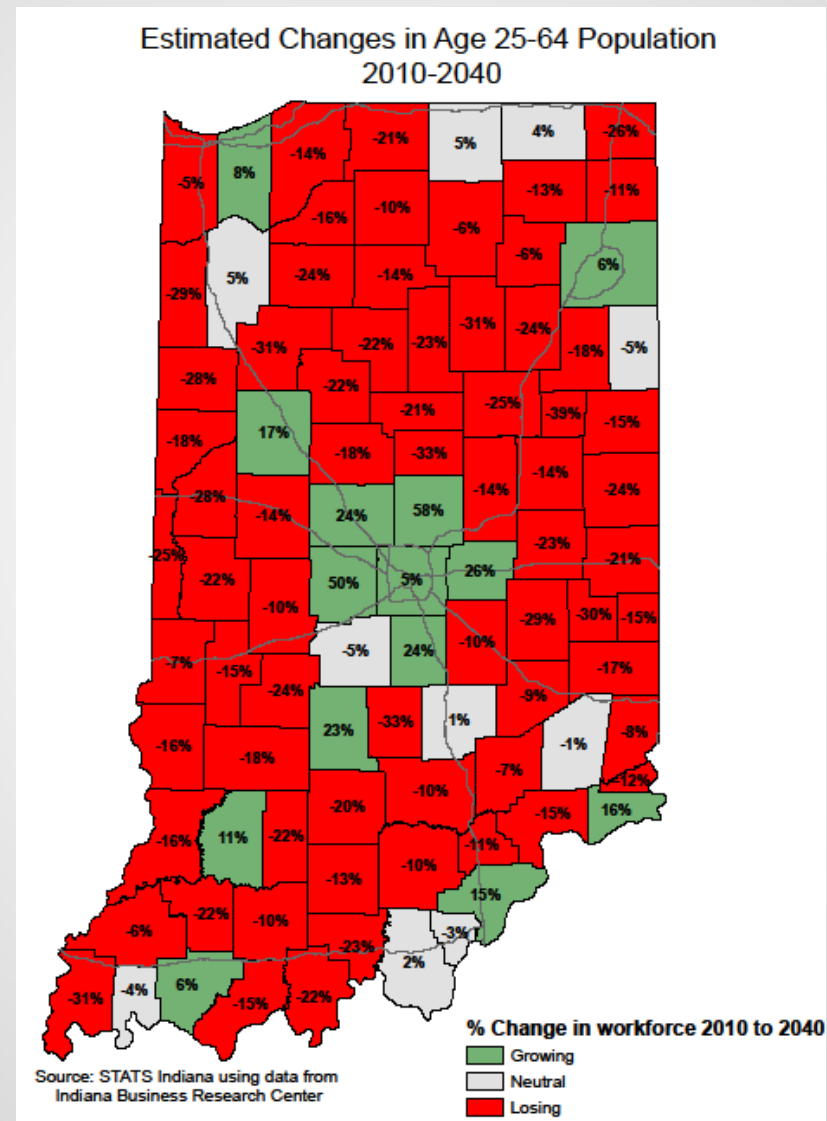
- Population change 2000 to 2030
 - Iowa 48th 1%
 - Ohio 47th 1.7%
 - Michigan 40th 7.6%
 - Illinois 39th 8.2%
 - Indiana 31st 12%
 - Kentucky 30th 12.7%
 - Wisconsin 28th 14.7%
 - US 29.2%



POPULATION CHANGE 2010 TO 2040

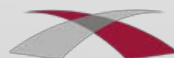


WORKFORCE CHANGE 2010 TO 2040

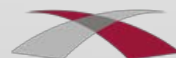
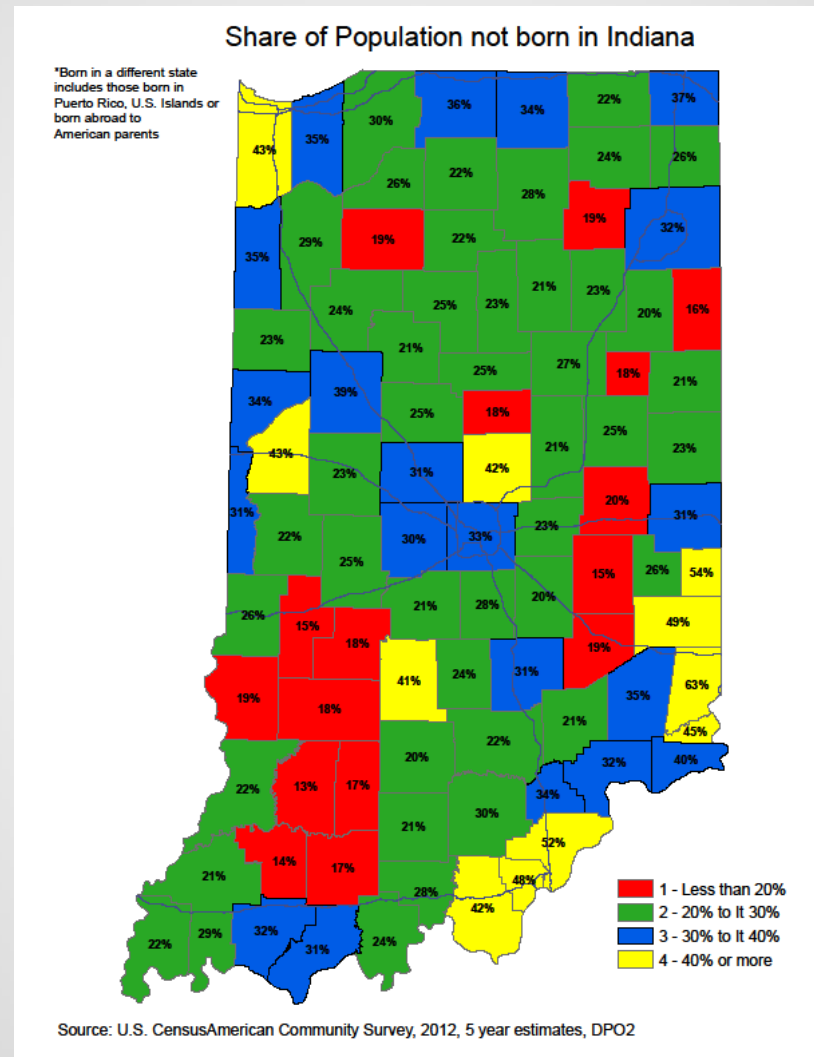


SPATIAL INTER-DEPENDENCIES

- Source of growth
 - Metro Indy
 - In 2010 net from Indiana into metro Indy of 20,000 households
 - IN 2010 net out of state into metro Indy migration of minus 2,000 households
 - Rural Indiana
 - 288,421 more seniors
 - -240,691 non-seniors



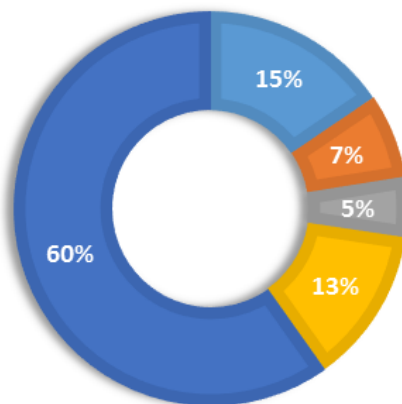
METROPOLIS OF INDIANA IN MIGRATION



WHO LIVES IN URBAN INDIANA

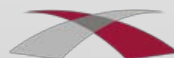
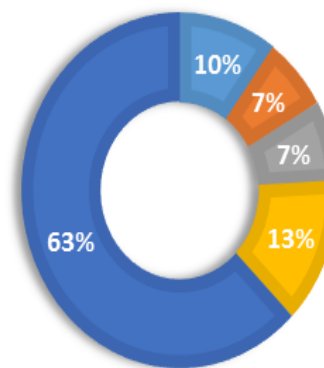
WHERE ARE NEW URBAN RESIDENTS MOVING FROM?

■ Rural Indiana ■ Midsize Indiana
■ Suburban Indianapolis ■ Urban Indiana
■ Other U.S. States

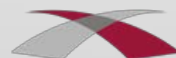
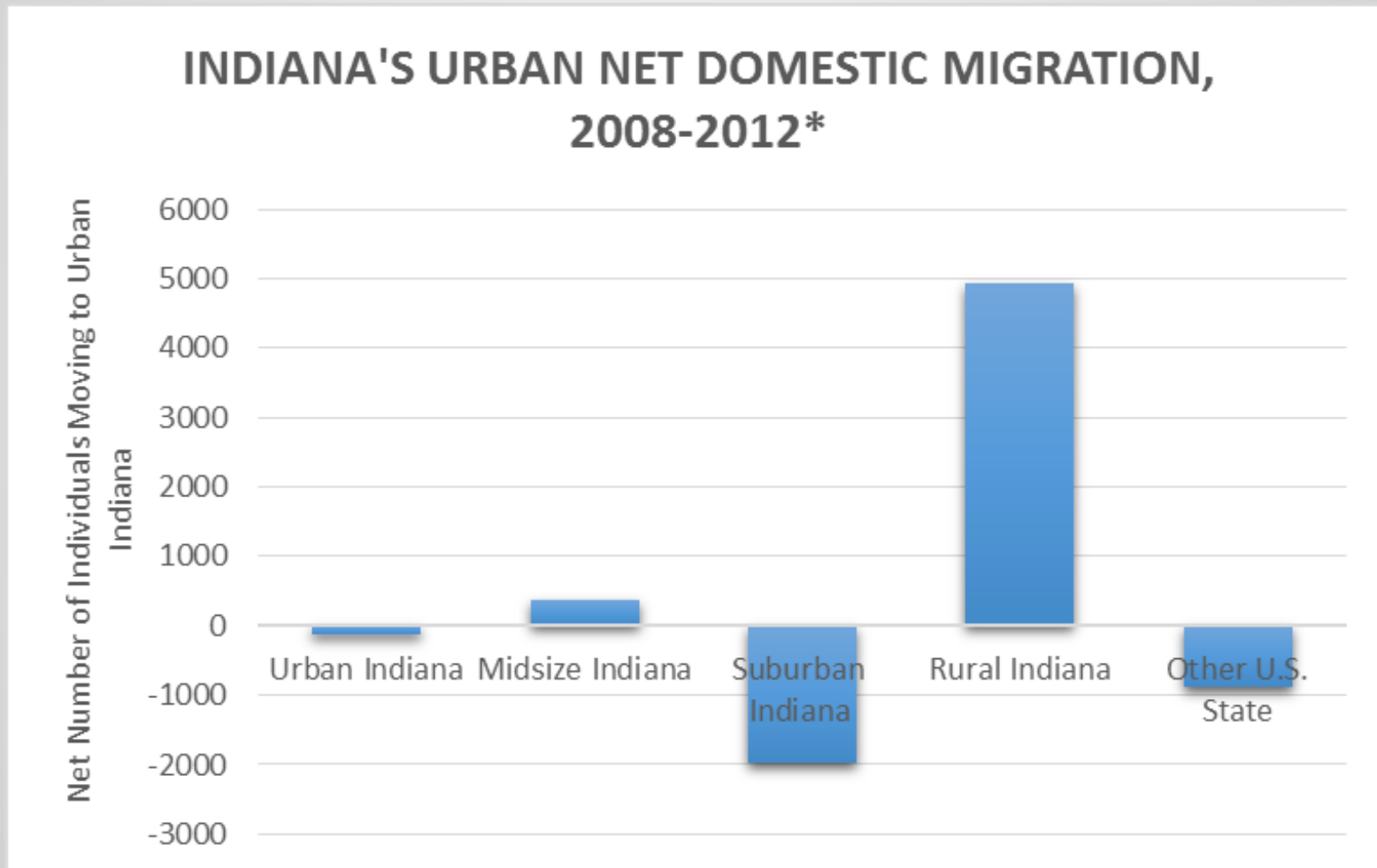


WHERE ARE URBAN RESIDENTS MOVING TO?

■ Rural Indiana ■ Midsize Indiana
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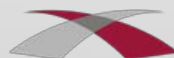


NET URBAN MIGRATION



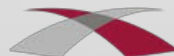
WHO LIVES IN CENTRAL INDIANA

- 67% born in Indiana
- 11% born in other Midwest (IN16%)
- 7% born in another country
- 9% South
- 3% Northeast
- 3% West



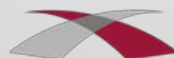
WHO IS MOVING TO MARION COUNTY (IRS)

- Source of growth
 - 7,653 in from other 49 states
 - 13,599 rest of Indiana
- Net
 - -1,153 from other 49 states
 - 798 from rest of Indiana



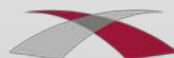
WHO IS MOVING TO HAMILTON COUNTY (IRS)

- Source of growth
 - Hamilton County
 - 6,765 in from other 49 states
 - 5,907 in from Marion County
 - 4,552 rest of Indiana
 - Net
 - 798 from other 49 states
 - 1,757 from Marion County
 - 1,042 from rest of Indiana

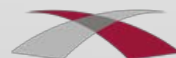
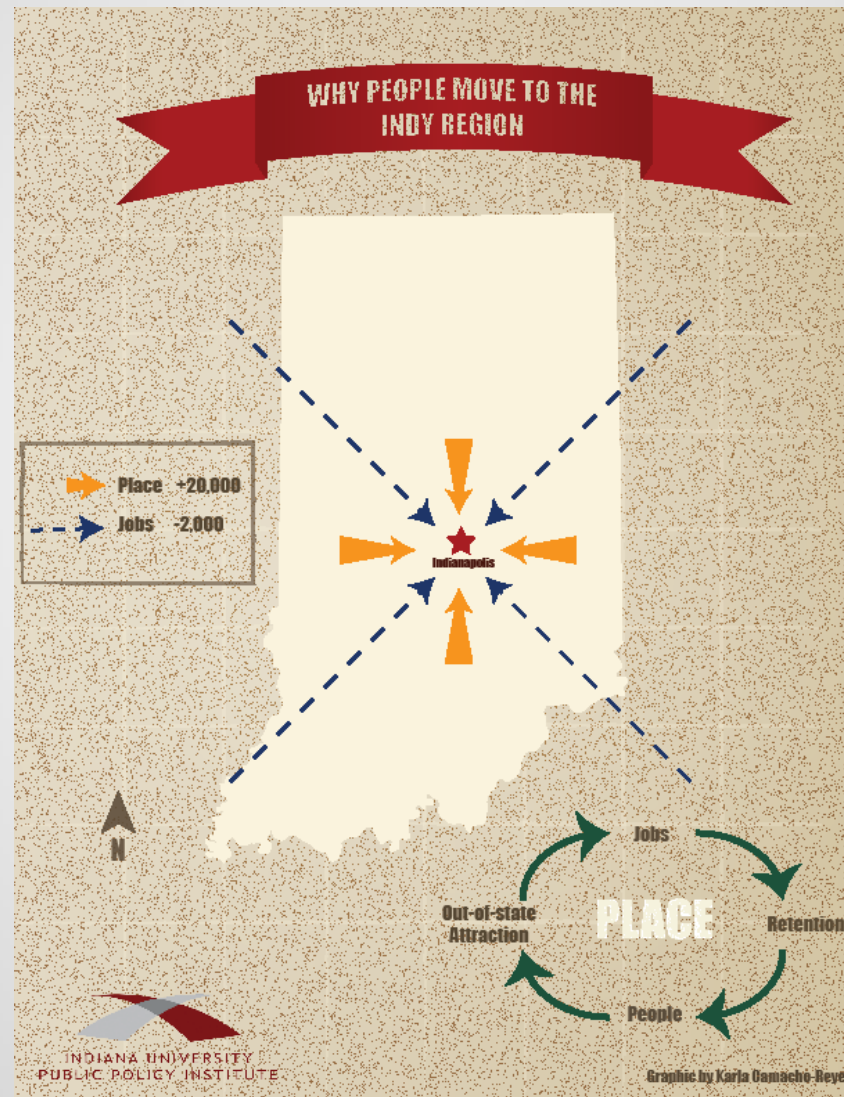


WHO IS MOVING TO BROWN COUNTY (IRS)

- Source of growth
 - 86 in from other 49 states
 - 68 in from Johnson County
 - 58 in from Batholomew
 - 48 in from Marion County
 - 53 Monroe County
 - 23 from Morgan
- Net
 - -35 total
 - -3 from other 49 states
 - -7 from Marion County
 - -20 from Johnson

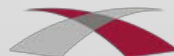


WHY PEOPLE MOVE TO CENTRAL INDIANA



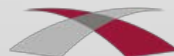
RURAL/SMALL TOWNS

- Supply exceeds demand
 - People vote with their feet
- Some will thrive
 - Within metro gravity
 - Near an interstate
 - Unique physical/natural amenity
 - Unique art/culture/historic amenity
 - Proximate to university



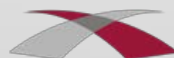
RURAL/SMALL TOWNS

- Risk factors
 - Lack of gravity / critical mass
 - Ag challenge
- Way forward
 - Find gravity
 - Manufacturing
 - Immigration???
 - Walkable, bikeable towns
 - Arts / culture
 - Tourism
 - Quality of life
 - employment



ARTS / AMENITIES CHALLENGE

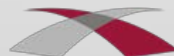
- Scale
 - We want arts and culture
 - Don't consume daily
 - How big of market to support
- Sport similar but levels of subsidy much different
- Rural v urban characteristics
 - Rural – Salt of Earth, Rustbelt Traditions
 - TV / radio / chains / walmart
 - Metro – Aspiring Young Families, Sophisticated Squires
 - Live performances / apps / bike trails / brew pubs / foodies
- The chicken v egg conundrum



YOU ARE NOT ALONE

RISK FACTORS OTHER PLACES

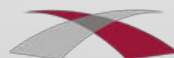
- All places
 - Outmigration and aging population
 - 4 major metros but only one core city
 - Image
 - Too small of an economy / not the right jobs
 - Cost versus value
- Metros
 - Tax exempt properties / regional amenities
 - Drew's theory of relativity / size matters
 - Depends on rural Indiana for growth
 - Compete cooperate



REASONS FOR OPTIMISM

MARKET BASED APPROACH

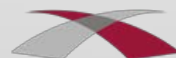
- Maximize opportunity / mitigate risks
 - Downtown Indianapolis (city, region, state)
 - Within Central Indiana
 - Millennials / boomers (key people)
 - Authentic urbanism / new urbanism
 - Across Indiana
 - Clusters - innovate, produce, and ship



CHANGE IS INEVITABLE

STATUS QUO POLICY IS UNACCEPTABLE

- The traditional status quo approach
 - Change - ignore and hope it goes away
 - Organization – my mission, my resources, my staff, my contribution
- A new approach
 - Embrace change – accelerate the good, mitigate the bad
 - Collaborate
 - Across sectors, causes, places, and organizations
 - Not a zero sum game
- Arts, Amenities and a commitment to quality/value
 - Link to creativity in population and in the workplace
 - Role in quality of life / lifestyle
- We all thrive or we all don't



FINAL THOUGHTS

- Why do people move here?
 - Job or family
 - from or to small town Indiana it's destination
- Grow jobs attract people nice places retain people
 - Innovate, produce and ship
- Authentic urbanism - millennials and boomers
- Tradition, stability and family
 - We've got to own it
 - And add inclusivity, innovation, creativity ..
- Millennial incubator
- Our niche
 - Cool, convenient, connected (people and place), and affordable

