



Madison County Government  
Planning and Development Department

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Date: June 26, 2015

To: Scott Hanson, City of Edwardsville  
David Coody, Village of Glen Carbon

From: Matt Brandmeyer, Madison County P&D Administrator *MB*

Re: Review of Demographic Trends

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**This is the first in a series of memos that will look at demographics, development patterns, future housing demand, potential revisions to the I-55 map and development regulations, and future steps.**

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As a follow-up to the March public hearings, I have reviewed the demographics section of the market and economic analysis in the I-55 Corridor Transportation and Growth Management Plan and compared figures with recent studies. The purpose of this effort is to determine if the projections in the I-55 Corridor Plan remain on track or if figures need to be updated. As you know, demographics are one of the primary drivers in determining market trends and future land use; this being the case, it is paramount that we continually review data for the I-55 planning area and make adjustments accordingly.

**I-55 Corridor Plan, Chapter 3: Market & Economic Analysis**

The "Market & Economic Analysis" is Chapter 3 of the I-55 Corridor Plan adopted in 2006. The chapter includes an economic analysis, demographic and household income shifts, projections and assumptions, household projections, housing unit projections, and land demand. The demographic component focuses on locational shifts, rate of growth, and household size.

The market analysis primarily focuses on growth rates. It shows that from 1990 to 2000, Madison County's population grew by 3.9%, Edwardsville grew by 43.2%, and Glen Carbon grew by 35%. The plan notes that one of the biggest factors in the growth experienced by Edwardsville and Glen Carbon is people moving from the "river cities" to "bluff communities" in search of newer housing and better schools. In 2000, the two communities had a combined population of 31,314.

The plan considers three (3) scenarios for projecting growth in Edwardsville and Glen Carbon using "Aggressive" (3%), "Average" (2.5%), and "Moderate" (2.2%) annual rates of growth. Between the two communities, population is projected to grow an aggressive 61,900, an average 57,700, or a moderate 53,800 people by 2025.

Another aspect explored in the market analysis is household size. In 2000 the gross population per household, or average household size, was 2.69 people in Edwardsville and 2.60 in Glen Carbon. According to national trends, average household size is trending downward from an average of 2.66 in 2000 to 2.54 in 2024. According to the plan, this downward trend is evident in the Edwardsville and Glen Carbon communities.

### **Recent Demographic & Economic Analyses**

Since the adoption of the 2006 plan, each of the partner communities has taken the opportunity to review demographics within each of their jurisdictions. This was necessary since the recession has had a long lasting impact on housing and growth and the 2010 census provides more current numbers.

#### **Madison County**

Upon the release of 2010 census data, the Madison County Planning & Development Department completed a demographic and economic profile. The profile includes sections on population growth, age, education, households, and employment.

The profile revealed the continuing shift in population from river cities to bluff cities from 2000 to 2010. While Edwardsville and Glen Carbon grew 42% and 59% respectively from 1990 to 2010, Alton lost 16% of its population and Granite City lost 13% during the same time period. Edwardsville grew to 24,293, and Glen Carbon grew to 12,934 for a combined population of 37,227 people.

From 1980 to 2010, all older population groups gained population while younger groups lost population. The population of the 65 and over category increased by 31% in Madison County. The 45-54 group increased by 51% and 55-64 by 27%. The 20-24 and 25-34 groups lost 9% and 7% respectively, and the under 18 group lost 13%.

The older age categories have progressively increased. There are no big dips or dives; the categories have grown evenly over the past thirty (30) years, reflective of an aging population as the baby boomers near retirement age.

In the younger age categories, which primarily include families, the trends haven't been as even, and there has been recent improvement. The 20-24 population has increased by 18% from 2000 to 2010. On the other hand, the under 18 population has dropped by 5% within the same timeframe.

The populations of Edwardsville and Glen Carbon are respectively 11% and 14% 65 and older with median ages of 30.6 and 36.7. The under 18 age group comprises 21% and 23% of the population. The latest national figures for the 65 and older group is 14.1% and 23.3% for those under 18.

#### **City of Edwardsville**

In 2010, the City of Edwardsville adopted a new Comprehensive Plan. Section 2 of the plan provides a brief synopsis of population trends and projections. The figures show that the city grew nearly 4% annually from 1990 to 2000 and 2.23% annually from 2000 to 2007 (upon the completion of a special

census). The plan states that the 4% growth can be attributed to the annexation of SIU-E along with campus housing.

The plan takes into consideration the residential building boom of the 2000's and the recession by stating that a 2.23% annual growth rate cannot be expected for years to come. A range of annual growth rates were developed for the plan based on the number of new homes and tempered by potable water capacity. The low end is .80% annual growth rate, and the high end is 2.15%. With these figures, the range of projected population in 2025 is between 28,940 and 36,770. In the middle at 1.7% annual growth, the 2025 population would be 33,961.

### **Village of Glen Carbon**

In 2015, the Village of Glen Carbon adopted an update to their Comprehensive Plan. The effort was an update to the 2008 plan and was undertaken to consider current conditions, which have changed since the original plan's adoption. The demographic component of the plan considers population changes, age, household size, income, and projections among other items.

In the age section, the plan states that the median age is 35.6 years old which is slightly higher than the state average of 34.7. Madison County's median age is 36.9 years old.

The plan considers two (2) scenarios for growth projections and only forecasts to 2020. The current population is between 13,250 and 14,000 people, and the projected 2020 population is between 14,000 and 16,000 people.

### **Demographic and Market Drivers**

Besides the ever important rate of growth, the force that will drive the market for the next thirty (30) or forty (40) years is the aging Baby Boomer generation and the sheer numbers of the Millennial generation.

The Baby Boomer generation includes people born between 1946 and 1964. With approximately seventy-five (75) million babies born in the US after World War II, the Boomers were the most expansive generation in US history. They have been the driving force behind the economy for the last fifty (50) years. They are now at retirement age, and they're generally living longer. As a result, the population over the age of 65 will double by 2050. Today it is approximately 43.1 million people. By 2050 it will rise to 83.7 million people. There will be more 80- to 90-year olds in 2050 than there are over the age of 65 today.

One of the best resources I've encountered to gain an understanding of this trend is "An Aging Nation: The Older Population in the United State," which was issued in May 2014 by the US Census Bureau.

As the Baby Boomers retire, the Millennials are emerging. The Millennial population, which includes those born between 1980 and 2004, is now bigger than the Baby Boomer generation. Even though the recession has slowed their progress, they are entering the workforce, beginning to buy homes, and starting families. They account for one-third of the US workforce and have become the biggest population in the workforce, overtaking Generation X in 2013. Similar to the Baby Boomers, the Millennials will drive the market for the next fifty (50) years.

## Conclusion

The I-55 planning process began in 2003, continues through 2015, and will continue thereafter. It is important that partner communities regularly examine market trends to understand inputs and determine if the plan requires change.

During the 2003 I-55 planning process, the focus was on the rate of growth, largely due to the building boom of the early to mid-2000's. Planners paid less attention to other demographic elements, including age and household size, because these elements primarily remained unchanged for many years. Consequently, the rate of growth was the primary determinant, and many other factors were less relevant. During this time, as throughout the country, suburban cities like Edwardsville and Glen Carbon were experiencing unprecedented growth, and cities adjusted by developing land use policies to address resulting growth pressures.

By 2008, the recession completely halted the building boom, and for a few years, new home construction languished. It was also during this time that the 2010 census figures were released, revealing the extent of the Millennial generation and their potential impact on housing. As a result, the focus for planners has transitioned from rate of growth to other demographic factors.

Over the last few years, subdivision development and new home permits are again beginning to pick-up steam. As a result of the recession and its impact on the housing market, planners are no longer fixated on growth rate. It remains a key part of land use planning, but it is no longer the primary focus. The key demographic forces being discussed as part of the national conversation on housing markets are as follows:

- Aging Population – the number of people aged 65 and older will double within thirty (30) years.
- Emergence of the Millennials – the 15-30 age group is the single largest generation in US history.
- Transitioning Household Size and Fewer Families – between empty-nesters, retiring Baby Boomers and the continuing (although delayed) emergence of Millennials, household composition is in transition.

The challenge for Edwardsville and Glen Carbon will be to understand these forces and their implications to ensure that land use policies, including the I-55 plan, remain on track.