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Geography of Opportunity

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About

The Civitas Institute is a community of scholars committed to exploring the ideas that sustain free societies and enable individuals to flourish.

Founded in 2022, the Civitas Institute draws its name from The University of Texas at Austin's motto, *Disciplina Praesidium Civitatis*—a condensed Latin rendering of Mirabeau Lamar's conviction that a "cultivated mind is the guardian genius of democracy." It's a fitting origin: Civitas is built on the idea that intellectual life and civic life are inseparable—and that a free society depends on both.

That conviction shapes our work. We are committed to the study of political thought, constitutionalism, economic dynamism, and the ideas that sustain a free society.



About the authors

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Michael Lind is the author of more than a dozen books on American history, politics, economics, and foreign policy, including *The New Class War*. A co-founder of New America, a nonpartisan think tank, Lind has been an editor or contributor at *Harper's Magazine*, *The New Yorker*, *The New Republic*, and *UnHerd*, and has taught at Harvard, Johns Hopkins, and the University of Texas.

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Introduction



Introduction

The migration of people and businesses has continually rewoven America's national fabric; this process has been part of our story even before the revolution. People and firms now move to suburbs, exurbs, and even small towns. Urban cores struggle to create economic opportunities for their residents while most new business concentrates elsewhere.

These trends contradict the long prevailing notion that dense inner cities are destined to dominate the future. Numerous forces have undermined this premise. One is the rise of remote workers, who now account for more than three times the number of those who commute to work by transit. Expensive new urban rail transit projects have not increased the share of commuting by transit in nearly all cases.

Urban cores have not died, but urbanism's trajectory is clearly shifting. Great legacy cities like New York will survive, but it is the communities on the suburban periphery, planned new cities, and restored small cities that are shaping the American future more than ever. Many of these new residential and commercial areas are not traditional "cities," as epitomized by Manhattan, Paris, or London.

But the urban landscape is always changing; it is not eternally fixed.

The decline of the legacy city has produced two revival strategies: the amenity city and the progressive city. The amenity city's policymakers accept the loss of most working- and middle-class families and most industries to specialize in luxury services and entertainment attractive to the affluent and well-educated.

The progressive city is more ideological; it hopes to serve as a model of a new civilization based on renewable energy; alternatives to auto-mobility; social engineering to promote "equity" among races, genders, and classes; and, in some

versions, a Marxist-Leninist variant of democratic socialism.

The gentrified amenity city and the ideologically driven progressive version are likely to be stuck with declining population and business shares. Technology is rapidly allowing for mass dispersion, which vindicates Frank Lloyd Wright's prediction that in the future "the city should be everywhere and nowhere."

People, not academic or planning models, will ultimately determine the shape of American urbanism. Rather than resisting popular choices, a wiser approach would be to focus on what Americans want and how best to help them find their own geography of opportunity. This requires, as an epochal shift demands, appropriate infrastructure and innovative governance. We need a bold yet realistic vision of a new kind of natural, urban form for this century—the decentralized OPPORTUNITY city.

To grow, the dispersed opportunity city will require a focus on boosting broad-based economic growth, greater efficiency, and, most importantly, a commitment to respect the vast majority's basic desires.

Part One

The Great Dispersion



Much of the media tends to ignore facts on the ground but looking at demographic and economic realities is the best guide to seeing how and where Americans want to live. Three contending visions vie to define the future of our urban landscape: the legacy city, the progressive city, and the dispersed city. It is the dispersed city, we believe, that offers the best opportunities to most Americans.

The Legacy City: A gradual decline from commanding heights

In 1969, the visionary architectural critic Eugene Raskin observed:

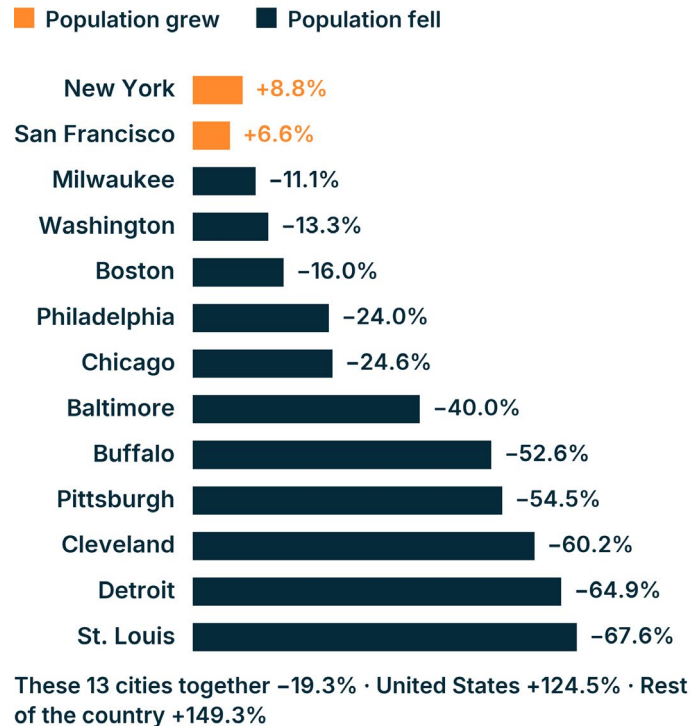
In short, today's technology makes it possible for you to live anywhere you want to.... Today it can be truthfully said that you can, if you like, sally forth into the wilderness and take with you every convenience and amenity the city has to offer. And leave the city itself behind.

Over a half century later, Raskin's observations have become ever more apt, as what we refer to as "legacy cities"—dense urban core municipalities like New York, San Francisco, and Chicago—are losing their primacy. These still-spectacular agglomerations from before the automobile's ascendance, retain advantages in such things as walkability, cultural activities and as first places for new immigrants. Post-World War II suburbs, however, that are highly oriented around automobiles and have lower population densities, have virtually surrounded these larger cities.

Indeed, New York and San Francisco excepted, all the densest cities in 1950 have experienced precipitous population decline. In some cases, like those of Pittsburgh, St. Louis, Detroit, and Cleveland, population has declined over 50%. This is part of an epochal shift away from the highly concentrated urban centers that geographer Jean Gottman has described as the "transactional city."

Most of America's densest big cities are smaller now than in 1950

Change in population, 1950–2025. Cities over 500,000 with densities above 10,000 per square mile in 1950



Derived from US Census Bureau data

Figure 1

Core cities have been losing their share of metropolitan residents for decades. According to a recent M.I.T. study, suburbs and exurbs constitute roughly 80% of the nation's metropolitan population, while barely 8% live in the urban core. Even most millennials, who tend to be mobile and are often portrayed as immutably attracted to dense environments, are heading to the suburbs, particularly as they start—albeit belatedly—families.

This trend has accelerated since the pandemic and the increase in remote work. Demographer Wendell Cox notes that from 2020–2024, the urban core counties lost 3,259,000 net domestic migrants, which was three times the rate of loss in the previous decade. The census reports that since 2020, growth has shifted to peripheral areas that are twenty miles or more from the central core, while areas within ten miles declined markedly, as the table below illustrates. Indeed, Brookings notes that



a small, and likely brief, post-pandemic recovery in large-metro populations reversed in 2024

Growth in the fastest-growing places has moved further out

Population change, by miles from city hall

■ 2018–19 ■ 2022–23

Up to 10



10 to 20



20 to 30



30 to 40



40 to 60



60 or more



Beyond 20 miles: 39% of growth in 2018–19, 50% in 2022–23

Source: US Census Bureau Vintage 2019 and 2023 Population Estimates; authors' calculations

Figure 2

Jobs have also been moving to the periphery and have been since the 1950s. From 2002 to 2022, between 80% and 90% of all employment growth in the United States was outside C.B.D.s.

Nearly three quarters of metropolitan jobs are outside the core city

Share of employment, 58 major metropolitan areas, 2025



Derived from County Business Patterns, US Census Bureau

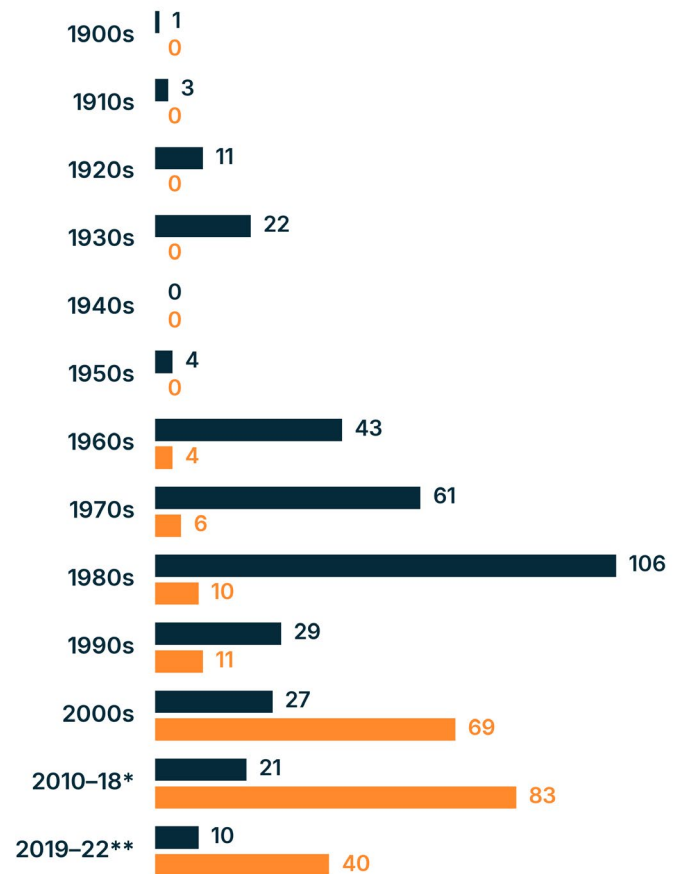
Figure 3

The office economy is in clear decline. Both office occupancy and the construction of new office space have declined since the turn of the century. In 1919, before the pandemic, construction of skyscrapers (buildings more than 150 meters or approximately forty stories tall) was one-third the rate of 1985 and half that of 2000. New U.S. office skyscraper construction has plummeted from 106 in the 1990s, to 27 in the 2000s, to a projected 10 since 2019.

Skyscrapers: from offices to homes

Number completed in the United States, by decade

■ Office ■ Residential



Statista, September 2018. *actual to 2018 **2019–22 forecast

Figure 4

Celebrated downtowns like Seattle, Portland, San Francisco, Boston, and Chicago have suffered in recent years. Office vacancy rates of over 20% or higher, have led to massive reductions in their assessed value. In some cases, they are selling at 90% lower than their former prices in a nationwide fire



sale. As an asset class, office properties generally have performed more poorly than retail, industrial, and residential assets.

“Zombie office space” continues to plague even New York, one of America’s greatest cities. Taxes, regulations, and crime are pushing financial firms, the lodestone of Manhattan’s economy, to places such as Dallas-Fort Worth. Suburban locations dominate these regions. Since 2020, the states that legacy cities dominate, including New York, California, and Massachusetts, have experienced a job decline, while Texas, Florida, Tennessee, the Carolinas, and Alabama have been among the winners. Overall, since the millennium, these states have seen their incomes rise 40% faster than traditionally progressive areas.

The Legacy City: future prospects

The future seems likely to accelerate this de-clustering trend. Technological breakthroughs, notes a recent Bain study, allow for work to disperse at previously unseen levels. High-density locales may still have advantages for certain industries, but most workers are in lower-density areas. This is not just an American trend, but a worldwide phenomenon.

The jobs in finance and professional and business services that are a downtown’s historic strengths are particularly suited to embrace remote or hybrid working. This dispersion has a deleterious effect, particularly for the many entry-level workers who migrate to big cities with traditional opportunity expectations. Despite outbursts from elite C.E.O.s and even the White House, and from the use of surveillance and financial incentives to dragoon people back to their cubicles, the shift continues strong and appeals particularly to more seasoned employees who often seek less expensive housing. Increasingly a “remote work culture” is successfully vying with traditional office culture in terms of productivity, although there is some concern

about the emotional and career challenges that particularly younger employees face because of remote work.

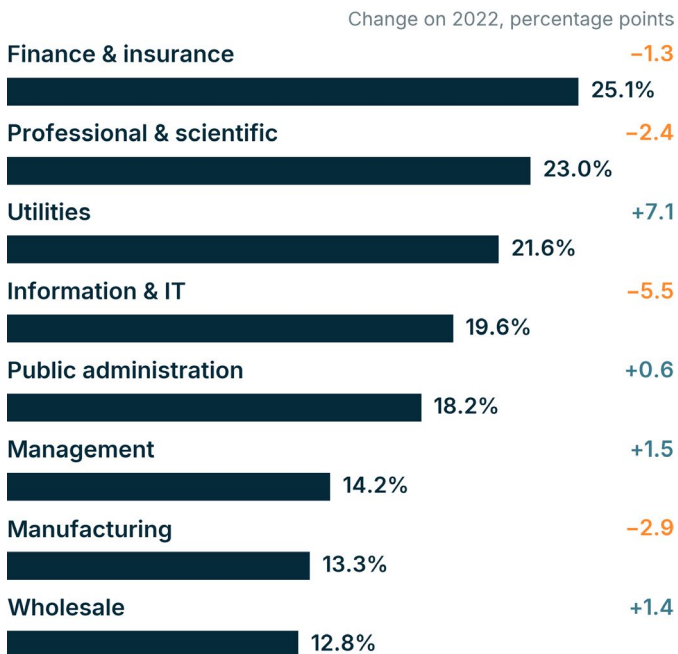
A University of Chicago study suggests that up to one-third of the overall workforce and up to 50% of employees in Silicon Valley-generated jobs could move to online work. Remote work, which was rising before the pandemic but has greatly expanded since, allows professionals to live ever further away from their place of employment. This trend has grown since and after the pandemic. This comes on the heels of a decade of change which has seen a once very egalitarian region become increasingly divided between the very rich and an increasingly struggling middle and working class, notes a recent Joint Silicon Valley study. The top 0.001% of Silicon Valley households hold more wealth than the bottom 50%.

Even hybrid systems, where workers come in two to three days a week, create a crisis for downtowns, as they often mean that certain days, notably Friday, have empty offices, which drastically affects local businesses. The remote trend extends even to big multinationals, notes the *Financial Times*, which plan to reduce their office footprint by 10% to 20% in the coming years.



Finance and professional services lead on remote work — but most sectors are slipping back

Share of new US job postings allowing remote or hybrid work, 2023, by NAICS sector



Source: Hansen et al., Remote Work across Jobs, Companies and Space, NBER 2023, via WFH Map

Figure 5

Workers largely embrace a more flexible approach. According to a Conference Board survey, work from home, whether full time or in a hybrid model, also addresses issues that are especially important to millennials, such as work-life balance.

The Amenity City

The most alluring cities, such as New York, will have a future in the emerging geography, but it will not be a dominant one. Their new role will be less central in running the economy. Instead, they will function uniquely as places of “concourse and rendezvous,” which H.G. Wells predicted well over a century ago. Favored places with evident attractions, like Manhattan and San Francisco, could feasibly sustain themselves as education, entertainment, and media centers.

But their employment in such high-value activities as finance and information appear

to be stagnating as these jobs move to dispersed suburbs in Texas and Florida. *City Journal* recently demonstrated that increasingly places like New York do not provide middle-class workers with many opportunities, which is a task at which they once excelled. Meanwhile Texas has replaced both California and New York as the primary locale for large companies.

The Amenity City: The Future of the Core?



“a bazaar, a great gallery of shops and places of concourse and rendezvous.” -H.G. Wells - description of urban centers in the future

For particularly the most attractive core cities, the greatest asset lies in providing a hub for young professionals, globe-trotting elites, and cultural creators. In New York, for example, while the overall population has declined, the number of ultra-wealthy residents has continued to grow. Increasingly, global cities like New York, London, Paris, Tokyo, and Miami serve as showcases for luxury brands such as LVMH, which continue to invest heavily in these markets. Even landmarks like Rockefeller Center are actively reinventing themselves as destinations for recreation, tourism, and



the arts. Other more stressed cities, like Philadelphia, increasingly also see arts as critical to reviving their fortunes.

This new “amenity city” would appeal mostly to younger, often single, as well as childless households, who are attracted by proximity to culture and live entertainment. A market clearly exists. Office towers have become increasingly anachronistic, but the number of residential high-rises, of which there were just eleven in the 1990s, have soared to eighty-three in the last decade and a projected forty more since 2019. There is also much greater effort now to transform office buildings, whether in New York or Los Angeles, into residential units. High-net-worth individuals and educated young professionals’ preferences now sustain many core urban areas. Downtown Chicago and its surrounding neighborhoods, for example, continue to grow to record levels although the core economy lags. In Manhattan, even in the wake of Mamdani’s election, prices continue to climb and elite areas like Madison Avenue and Soho thrive. In fact, even as Gotham’s overall population has declined, the number of super-rich is growing. When ranking the best places for wealthy people, the big winners include places like New York City, Boston, and San Francisco.

The Progressive City

This “amenity” form of urban growth is ascendant among urban progressives who oppose gentrification. As the new progressives take power in more cities—notably Portland, Seattle, Chicago, Washington, D.C., and Los Angeles—they tend to embrace policies that restrict law enforcement, allow for public camping, and further tax businesses and wealthy individuals. Today these people are more mobile. As Richard Florida points out, this group’s mobility has been made easier because “digital technology enables them to live in one place and keep their businesses in another.”

New York Mayor Zohran Mamdani’s drive to tax wealthy people with second or third residences reflects the new progressives’ fundamental economic approach. Amid the growing cost of living crisis, the socialist ascent augurs a possible American turn towards radical collectivism, at least in the urban cores and states that these cities dominate. Yet we already know that previous redistribution approaches in large cities have failed to improve conditions, even though their spending rose by an adjusted 18% over the past decade.

Today’s progressives should not be confused with the “sewer socialists” that arose in the last century, notably in Milwaukee, Reading, Schenectady, and Flint, as well as New York. In the twenties, thirties, and beyond, these reformers promoted real world socialism, favored economic growth, and did not talk of seizing the means of production. Mamdani’s brand of leftist politics is not social democracy as Sweden practiced until recent decades, where a dynamic export-oriented economy financed the welfare state.

Unlike traditional socialists, the new progressive base does not come from the working class, but from credentialed young people faced with a toxic combination of prohibitive costs and limited opportunity. Critically, rather than trying to boost economic growth, progressives focus on redistribution. Prominent socialist economists have recently stated plainly that they embrace a “no growth” economic model, at least for Western countries. The United Nations also embraces that position. This program seeks to spread resources through the provision of annual income, health care, and rental subsidies.

Progressives still embrace expanding public housing, something that even sympathetic observers note has largely failed, leaving many people in dangerous, blighted residences. Defunding law enforcement, another progressive priority, makes compelling cities like New York less

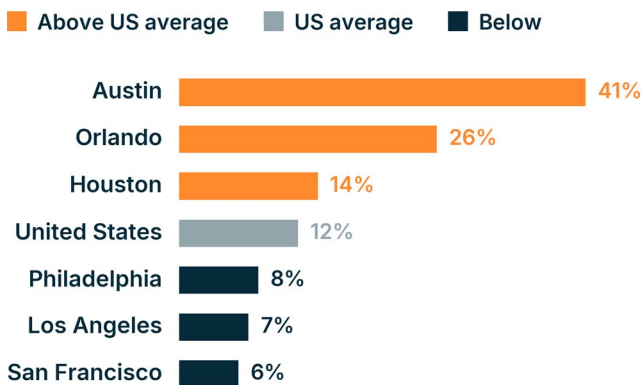


hospitable to both businesses and ambitious individuals, particularly those over 30.

Unless new progressives entirely fill Washington, D.C. with politicians who embrace their priorities, progressive cities seem likely to struggle in the future, particularly in terms of jobs and incomes. Overall, these cities face significant budgetary challenges and continue to spend money in ways that do not stimulate growth and opportunities. Some may end up dependent on federal bailouts in the coming years.

Sunbelt metros added jobs three times faster than the national average

Change in average annual employment, 2015–2025



Source: Quarterly Census of Employment and Wages, Bureau of Labor Statistics

Figure 6

Their planning strategies center on densification to make cities more affordable. Yet the evidence shows that many of the states such policies dominate—New York, New Jersey, and California—are those where more people must work an extra twenty-five days a year to pay for a 2007 living standard. In contrast, the easiest places to maintain the 2007 levels with fewer extra hours are in the South or the Plains.

Progressives make things tough on anyone who wants to live in a single-family house or own a car. They use bike lanes and street closures to pressure urban residents to give up their cars. In the neo-progressive vision, people should walk in pedestrian “fifteen-minute cities” or take mass transit, while

high-speed passenger rail will connect dense conurbations. To combat climate change, carbon-free, renewable energy sources, including windmills, solar panels, and hydropower, will provide power for most, if not all, of the progressive urban utopia.

Progressive urbanists have proselytized this vision with posters and videos showing happy people on urban bikes on foot or on bicycles, while high-speed trains in the distance whoosh past windmills and high-rises. But as attractive as these images may seem on paper, this vision is unlikely ever to get much past the blueprint stage.

The rise of the dispersed city

When taxes rise to ever greater heights, and social contagion affects downtown workers, the result is to encourage businesses to move further away from the urban core, often to the periphery. Historian Robert Bruegmann notes that this has happened despite the steady opposition from journalists and intellectuals, who consistently have decried suburban “sprawl,” seeing it not as a reflection of the market, or a reaction to urban disorder, but a government-led process that “forced” people into the suburbs.

Urban historian Lewis Mumford described suburbs as “a dissolute landscape,” “a twilight zone,” neither urban nor rural. Like many critics of suburbia, Mumford saw the suburbanite as stuck in dormitory communities, with hours wasted on transit or the car. He never envisioned that suburbs would evolve into their own places, with their own economies and civic culture.

During the 2008 financial crisis, widespread media accounts suggested, among other things, that the exurbs would become “the next slums.” The *New York Times* even suggested how to carve up the suburban carcass, with some envisioning that suburban three-car garages would be “subdivided into rental units with street front



cafés, shops and other local businesses,” while abandoned pools would become skateboard parks.

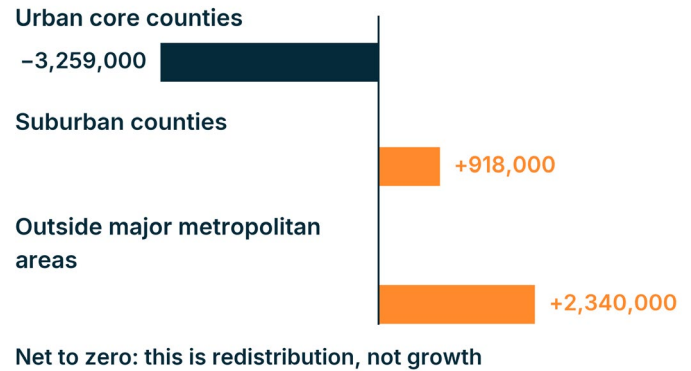
The periphery was also roundly blamed for everything from class segregation to environmental damage, and even to the decline of the American dream. Prominent Harvard economist Edward Glaeser, and, until recently, urbanist Richard Florida maintain that cities continue to provide unique (in Glaeser’s words) “engines of innovation” as they have since the time of Socrates. Mid-2010s books like *The End of Suburbs* were widely greeted as prophetic. Even today, as the shift to suburbia has accelerated, elements of the intelligentsia still widely embrace this notion.

It should be obvious by now that these views have passed their sell-by date. The evident cause of dispersion lies in a simple concept: consumer preferences. Pew Research, for example, found that most Americans opt for larger houses and less density, particularly among middle aged people. The exurbs now constitute today’s “boomtowns,” something Part Three of this report will revisit.

Americans have long embraced lower densities. By 2001, fewer than 10% of Americans wanted to live in big cities, while the vast majority preferred suburbs, small cities, and towns. Twenty years later, the numbers were roughly the same, with only 9% preferring a big city. Through the first four years of this decade, the urban core counties lost 3,259,000 net domestic migrants, which is three times the rate of loss in the last decade.

Urban core counties lost 3.3 million people to the rest of the country

Net domestic migration, major metropolitan areas by state and DC, 2021–2024



Derived from US Census Bureau data

Figure 7

Today the action is in the periphery. Regions that have attracted the newest residents and built the most homes tend to be in sunbelt metros dominated by sprawling suburbs. Critically, suburbs are now the epicenter of American tech development and even dominate new patents. Tech’s leading hotbeds—Silicon Valley, Boston’s Route 128, the southern California Technopolis, suburban Seattle (home of Microsoft), and the Austin periphery—are all in peripheral areas.

Outside a narrow band of high-income residents, the economic incentives to stay in the big city have declined. Moving out of the core cities used to mean a downgrade in earnings, but now, as Brookings Institution scholar Mark Muro has noted, salaries across the nineteen-state “American Heartland” region, essentially the territory between the Appalachians and the Rockies, are above the national average.

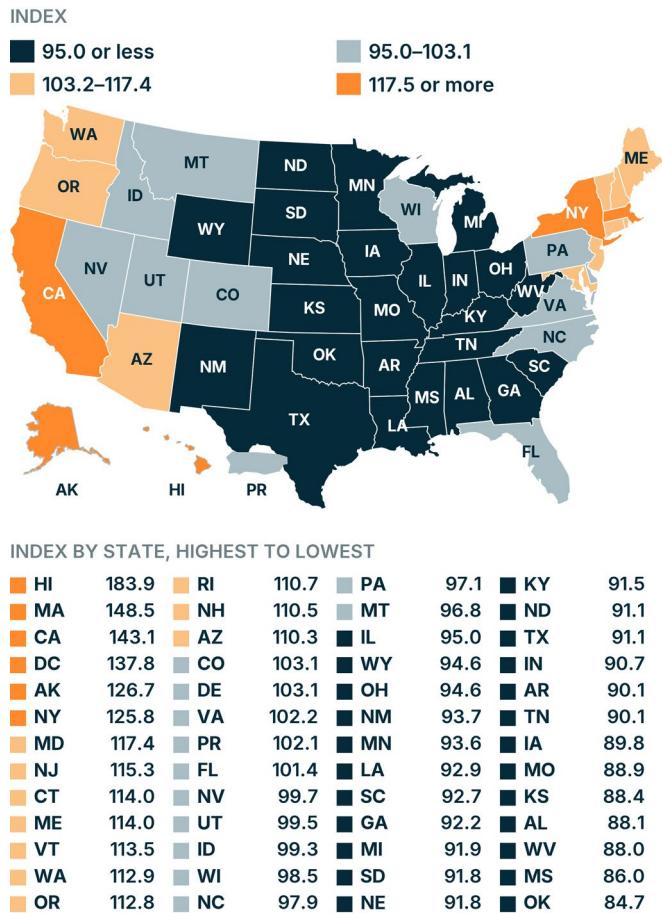
Another study found that of the ten areas with the highest cost-adjusted incomes, eight are in the heartland. In contrast, those with the lowest adjusted incomes were entirely on the ocean coasts. The cost of living is lowest in the South and Midwest, and the highest costs of living are in California and nearby states as well as the Northeast Corridor from Washington to Boston. Not



surprisingly, the South is now the only region in the country that is still growing.

Living costs are highest in the Northeast, California and Hawaii

Cost of living index, 2025 annual average. US average = 100



Source: Missouri Economic Research & Information Center (MERIC), Composite Cost of Living Index, 2025

Figure 8

The periphery still appeals to younger people, particularly as they marry and start families. Even before the pandemic, two-thirds of millennials favored suburbs as their preferred residence. Educated millennials, now well into their thirties and forties, are migrating from the larger coastal metros to the suburb-dominated sunbelt, including smaller cities. A similar pattern seems to be evolving among Generation Z, the successor generation.

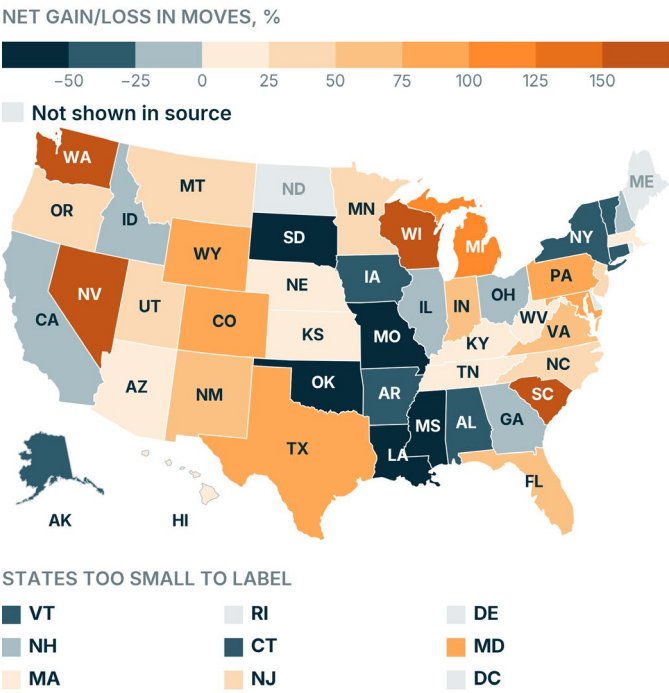
In a poll taken in early 2026, roughly half of Massachusetts residents said they have considered leaving the state. Similarly, one-third of New York residents already plan to leave within the next five years while four in

ten Californians and half of Illinois residents feel the same. In the end, the traditional urban states seem to be losing out, even to “hillbilly states” like Alabama, Arkansas, and Oklahoma, and even to such perennial laggards as West Virginia and Mississippi. By 2050, according to the most recent projections, Texas is on track to surpass California in population, which became the nation’s largest in 1960.

Meanwhile, the fast-growing counties that are home to most planned communities gained mightily among those earning over \$75,000, and especially those between the ages of 30 and 44, as we will discuss in Part Three. Young people, notes economist Gary Becker, are critical to an innovative economy. In the U.S., more of them are likely to settle, at least as they age, in the interior.

Brain drain and brain gain: where college graduates moved in 2023

Net gain or loss of college-educated movers, by state, as a share of moves



Source: Annual Social and Economic Supplement (ASEC), Current Population Survey,

Figure 9

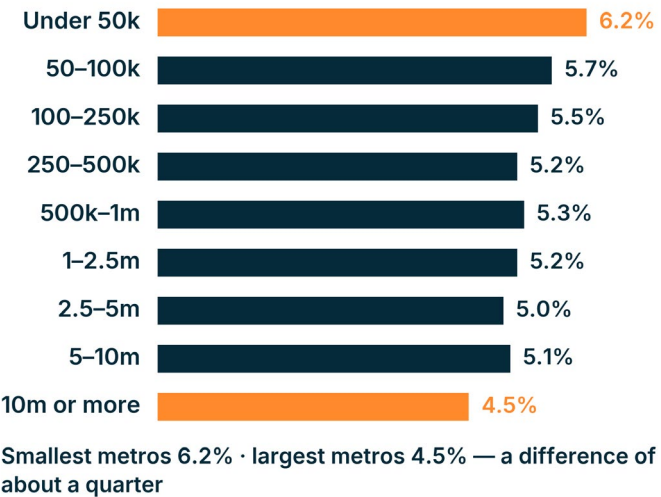


Dispersed communities are also the nation’s nurseries. Large cities are becoming more oriented towards single people, who are more left-leaning and tend to have fewer children. This reprises some dynamics of the 1950s and 1960s, when suburbs drove the “baby boom” as families were able to buy affordable houses distant from the central core.

Overall, the highest birth rates have been occurring in the less densely urbanized states like the Dakotas, Alaska, Iowa, and Texas, while the lowest are clustered in the Northeast, California, and the Pacific Northwest. The lowest general fertility rates are in metro San Jose; Los Angeles; Providence; Seattle; Austin; Boston; St. Louis; Salt Lake City; Greenville, SC; and Tucson. The San Jose rate is 38.6 per 1,000 women of childbearing age. America’s future, then, lies outside the largest core urban areas, and increasingly in smaller towns and cities.

Birth rates fall as metropolitan areas get bigger

Share of women aged 15–50 with a birth in the past year, 2023, by metro population



Derived from US Census Bureau data

Figure 9

The surprising shift to smaller cities and towns

Perhaps nothing more reflects the dispersionary trend than smaller cities’ revival. For the first time since the

nineteenth century, smaller communities are again growing faster than the large metropolitan areas. The rise of living costs in the great metropolitan areas in parts of Florida and even parts of Texas partially accelerated this trend. Even traditionally affordable areas like Columbus, Ohio have experienced higher housing costs, which discourages further migration.

Increasingly, migration flows are shifting to more affordable states. Arkansas, the Carolinas, Alabama, and Oklahoma are dominating the ranks of the fastest-growing states. Overall, in 2025, the South was the only region to gain both population and babies. Given the country’s otherwise stagnant population, this increase is significant. The lowest birth rates are found mostly in West Coast and Northeastern states. If current trends continue, by 2050, the South will account for some 40% of the U.S. population, which is more than twice the share of the Midwest and Northeast.

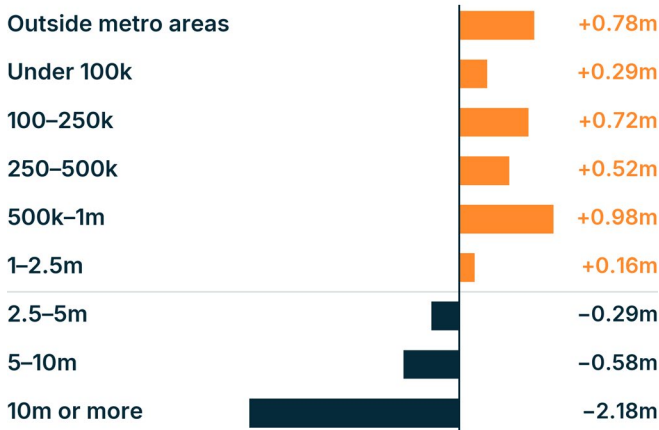
This is where much of the nation’s new single-family product tends to be built. An analysis of Census Bureau data finds a stark turnaround from 2010–15, when all categories of metros with fewer than 250,000 residents suffered net out-migration, with migration shifting towards smaller metros outside the Northeast and the West Coast.

The most recent data shows that the three largest population categories all lost net domestic migrants over the decade’s first five years. At the same time, all population categories below 2.5 million gained net domestic migrants. The greatest increase was in the 500,000 to 999,000 categories, and the second largest gain was *outside* the metropolitan areas.

Labour markets above 2.5 million are the only ones losing people

Net domestic migration, 2020–2025, by labour market (CBSA) population, millions

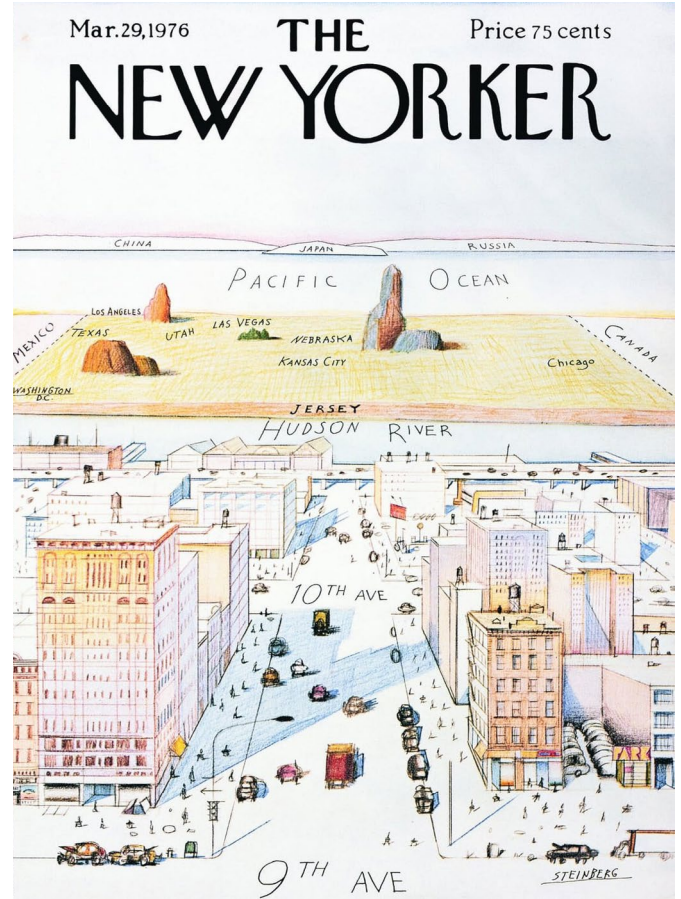
Net gain Net loss



Markets above 2.5m lost 3.05m people; everywhere smaller gained 3.45m

Derived from US Census Bureau data.

Figure 11



As with the suburbs, the revival of small-town and rural America refutes the common media coverage. In a 2018 article asking, “Can rural America be saved?” the *New York Times* reported that small cities and towns, particularly in the middle of the country, were “getting old” and facing “relentless economic decline.” The famous *New Yorker* magazine cover showing much of civilization ending at the Hudson River save for Chicago, Washington, D.C., and then the West Coast reflected a mindset that, while formerly relevant, makes little sense in the dispersionary era.

Two decades ago, the Fargo, North Dakota downtown was dull and largely derelict. Now it boasts loft apartments, a fine boutique hotel and a panoply of cultural attractions, including art studios and dance venues. Between 2010 and 2025, 21,000 net domestic migrants have moved to its metropolitan area. By comparison, Minneapolis–St. Paul, the largest nearby major metropolitan area, lost 33,000 net domestic migrants over the same period. The Minneapolis–St. Paul metropolitan area is thirteen times larger than Fargo’s.



Fargo gained migrants while Minneapolis–St. Paul lost them

Net domestic migration, 2010–2024



Derived from US Census Bureau data

Figure 12

Some of this reflects economic changes. Fargo, for example, became home to Great Plains Software, a company Microsoft later bought. Huntsville, Alabama, another example, has experienced strong growth because of its longstanding connection to the U.S. space program. Huntsville also recently took the center for the U.S. Space Command from its previous base in Colorado. Huntsville has also seen growth in advanced services and biotechnology in recent years.

Traditional manufacturing-oriented communities in the Midwest and parts of the South have also seen new growth. Grand Rapids, Michigan is the fastest-growing large metropolitan area for manufacturing jobs since 2009. It has added 35,000 jobs during that time. In 2000, the Grand Rapids area ranked seventh among metros for millennial population growth, according to a recent study. The metro has been cited as having one of the nation's highest millennial home ownership rates.

Dispersion as the solution to the housing crisis

Housing accounts for about 88% of the difference in the cost of living between expensive big city areas and the national average. This cost has transformed the geography of opportunity. Most Americans of all generations and political persuasions favor single-family houses in lower-density neighborhoods.

Housing is two thirds of the extra cost of living in expensive metros

Share of the excess cost of living over the national average, metropolitan areas above the national average, 2021



65.5%

Housing

■ Goods 23.2% ■ Utilities 9.4% ■ Services 1.9%

Estimated from BEA Regional Price Parities, 2021

Figure 13

When homes in Los Angeles were affordable, people opted for them. Some disparage even the notion of home ownership, calling it “a weapon of white supremacy,” but three in five young people identify homeownership as an essential part of the American dream, even though housing affordability stands at its lowest level in thirty years.

Progressives, city planners, and their media echoes maintain that squeezing more apartments and condos into existing big cities will increase urban housing affordability. But policies that restrict peripheral growth in favor of increased densities do not lower prices, as is sometimes suggested. In fact, U.S. data suggests a positive correlation between greater density and housing costs. It is overwhelmingly *outside* the urban core, and generally furthest from it, that the chance of ownership becomes real.

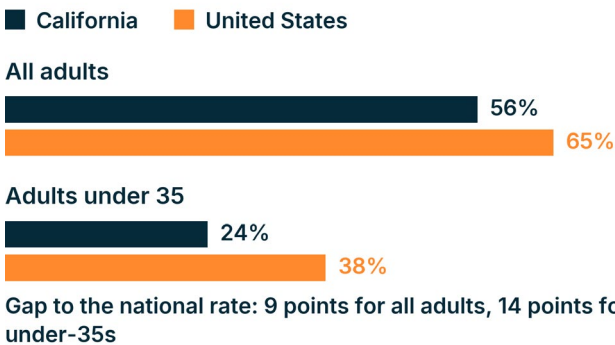
California provides a compelling case study. Recent reforms promote inner city densification, something the press widely celebrates, while regulations remain aimed at stopping suburban development. This approach has not helped keep housing costs down; a California home's median cost is 2.5 times the median cost of a home in the rest of the country. California also has the second lowest homeownership rate in the nation at 56% (New York's is the lowest, at 54%), well



below the national average and particularly poor for younger people.

California's homeownership gap is widest among under-35s

Homeownership rate, California and the United States, 2023



Source: US Census Bureau, Housing Vacancies and Homeownership (CPS/HVS); American Community Survey 2023

Figure 14

What kind of country do we want?

These policies, which stress growth in blue-collar industries and are more respectful of consumer market demand, provide a potential antidote to ever greater concentration of wealth and corporate power or, in response, a greater embrace of socialism. At least until recently the managerial upper-middle class has flourished, and the gap between them and those below them has grown. These strata, notes one observer, live “in different neighbourhoods, different schools, different horizons.”

Dispersion, re-industrialization, and restructuring government are essential if we wish to create an era of opportunity for most Americans. In the United States over the past decade, the proportion of real estate wealth held by middle- and working-class owners fell substantially, while that controlled by the wealthy grew from under 20% to over 28%. In the last decade, high-income households enjoyed 71% of all housing gains, while the shares of middle- and lower-income families declined precipitously. The proportion of land owned by the nation's one hundred largest private

landowners grew nearly 50% between 2007 and 2017.

A tenth of the U.S. economy is comprised of industries where four firms dominate more than two-thirds of the market, with finance and information technology now among the most concentrated.¹⁰ The financial sector illustrates this trend particularly well. According to a recent study by the Federal Reserve Bank of Minneapolis, concentration of insured deposit funding among the top four commercial banks in the United States rose from 15% in 1984 to 44% in 2018, a roughly threefold increase.

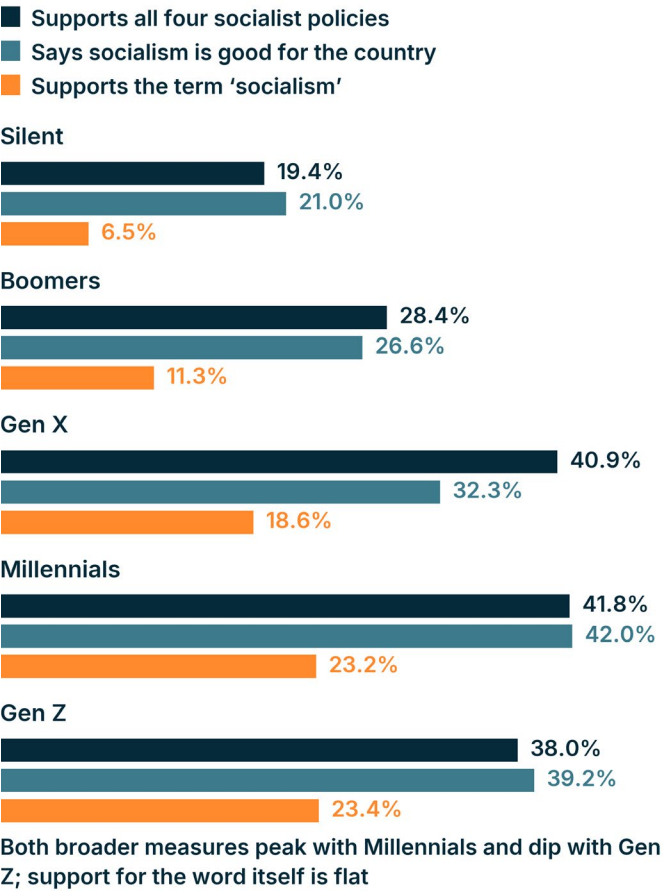
Springtime for socialism?

These conditions are ideal for the rising socialist movement. As the old German theorist would have expected, if people—especially the young—have difficulty buying property or launching a successful career, it undermines their faith in the market system. According to one poll, 62% of Americans under thirty have a positive view of socialism, while a full third now even back the more authoritarian communist alternative.



Support for socialism is far higher among younger generations

Share of US adults agreeing, by generation



Source: Cato Institute 2025 Fiscal Policy Poll (Release II) Figure 15

These views can best be addressed not by blindly favoring the status quo, but by finding ways to expand opportunity. In addition to the housing crisis, barely half of all people under 30, according to one survey, have full-time jobs. Many young men find themselves in economies with few options for high-paid work, and many simply drop out of the workforce.

Ironically, some news organizations still rank population areas with slow, little, or no growth as better places to live. A recent CNBC survey, for example, concentrated on such things as labor laws, laws on reproduction, health care, and inclusionary policies. States like Maine, Massachusetts, Minnesota and Hawaii, ranked highly, while states like Tennessee that are growing and

gaining migrants, were ranked near the bottom.

Clearly, many media outlets do not believe that growth is good. But people and companies are still flocking to places that CNBC may consider hellholes, or at least gauche. What people want is not necessarily the policy agenda slow-growing states favor, but those policies—in housing, taxes, and regulation—that support broad-based economic growth. This is essential not only to our economic health but to our political system. In the end, we have two options if we do not wish to continue towards ever-widening wealth gaps: we can either lay the foundation for a future collectivist surge or find ways to expand the geography of opportunity. As Benjamin Friedman has argued, there’s been a long-standing connection between economic growth and social and political progress.

This paper argues that far too little emphasis is placed on growth, particularly on policies that allow the vast majority to feel the benefits. A city strategy that relies largely on transfers from the very rich is unlikely to promote upward mobility as effectively as support for the liberal market system does, particularly as those efforts tend to drive some of the wealthiest taxpayers to other states, even if they retain pieds-à-terre in the progressive urban areas. We should focus on broad-based wealth creation not just in the economy, but also through education and housing policy.

Building the Opportunity City

Housing policies in major metropolitan areas should allow the organic expansion of their urban footprints. A recently published analysis demonstrated that even a small increase in peripheral development would produce three to six times the number of new homes, something far more practical for most people than densifying urban cores. Far from an undesirable blight, even densification advocates now concede

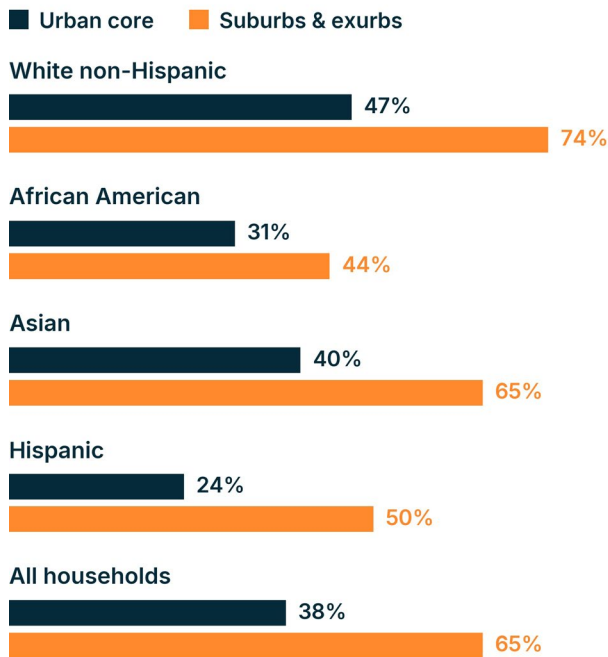


that “sprawl” is an important strategy for producing affordable housing in a form people desire.

government should help citizens achieve their aspirations, rather than insisting that their desires are wrong.

Home ownership is higher in suburbs and exurbs for every group

Share of households owning their home, 53 US major metropolitan areas, 2015–19



Source: City Sector Model based on American Community Survey, 2015–19 **Figure 16**

Like the legacy city before it, with its trains, high-rise offices, and massive public spaces, the decentralized opportunity city will require shifts in such things as infrastructure investments and housing, and new ways to govern. As America decentralizes, we need a policy environment that is less top-down and closer to the public. The following papers will spell out the kind of changes that creating a more workable, just, and successful future will require.

So instead of throwing up obstacles to contemporary trends in doomed attempts to freeze change or impose unpopular urban forms by fiat, government, particularly at the local level, should focus on ways to remove barriers to needed development, and fund relevant infrastructure, including schools, parks and power systems. In a democracy,

Part Two

Geography of Opportunity



Jobs and education in the merging opportunity city

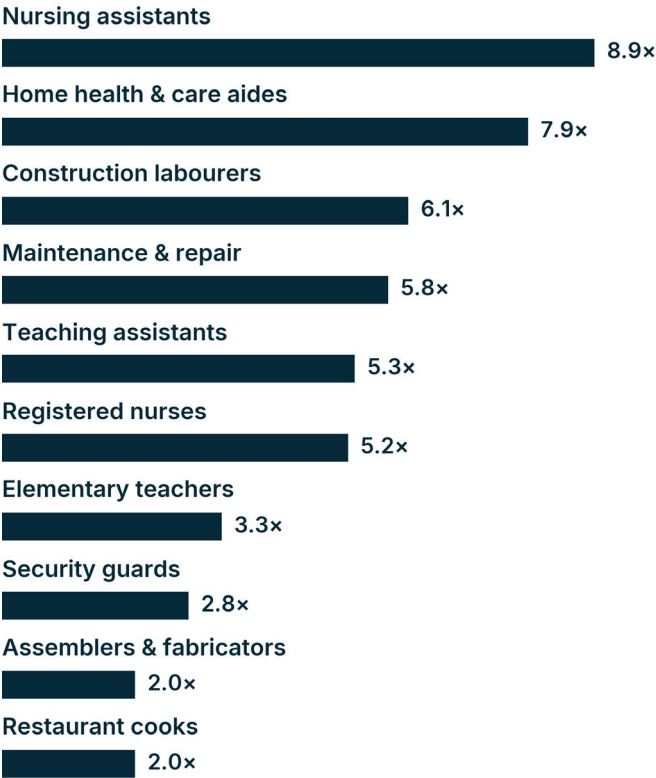
In the new, dispersion-defined economy, we may also see a shift in both economic drivers and population. Hardware and health care are the two main industries most likely to drive this new economy. The partial on-shoring of industry, driven by national security considerations as well as national growth strategy, may lead to increases in manufacturing-related jobs and skilled trades.

Today, the service sector accounts for nearly 80% of the American workforce. Manufacturing is unlikely to change that proportion radically, given automation’s potential to eliminate factory, warehouse, and freight transportation jobs, even while it creates some new ones. What will change is the composition of the service sector in which most Americans will work: AI may eliminate many white-collar clerical, professional, administrative, financial, and academic jobs.

In the new configuration, we can expect “high touch” jobs resistant to automation or robotic replacement to grow as a share of all jobs. Of these high-touch, human-provided jobs, the most important will be health related services. Other opportunities, such as artisan-based retail, construction, assemblers, maintenance, and cooks may also become more prominent. Some jobs may simply be too expensive to automate.

Automating care work costs many times what the job pays

Annual cost to automate as a multiple of the annual median wage, top 10 US occupations



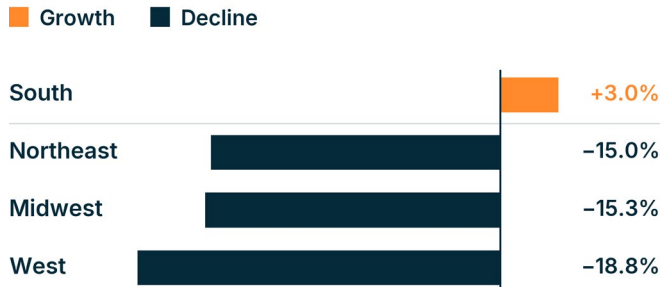
Source: Planera analysis, June 2026, using BLS wage data and automation vendor pricing Figure 17

As more people migrate to new jobs on the periphery, the focus for both job training and education will necessarily increasingly take place in these more affordable and spacious areas, which are also experiencing many of the most impressive gains in educational achievement and computer literacy. Overall growth in numbers of college students will be predominately in the South, which is projected to gain population well into 2050, even as the Northeast and Midwest lose population. Declining fertility rates will drive this shift.



Only the South will have more high school graduates in 2041

Projected change in the number of high school graduates, 2041 against 2023



Western Interstate Commission for Higher Education report, "Knocking at the College Door"

Figure 18

Opportunity in the post-AI world

The shift away from white-collar office jobs and back to domestic manufacturing and personal services marks the end of the idyll of a post-industrial economy. In the AI-era, countries cannot thrive without producing tangible goods or providing jobs. But the fantasy that they could has had deleterious effects on the American economy. Between 2000 and 2007, the U.S. hemorrhaged 3.4 million manufacturing jobs, about 20% of its total, and lost a further 1.5 million manufacturing jobs between 2007 and 2016. From 2004 to 2017, the U.S. share of world manufacturing shrank from 15% to 10%, while reliance on Chinese imports doubled, even as Japan's and Germany's reliance on Chinese goods shrank.

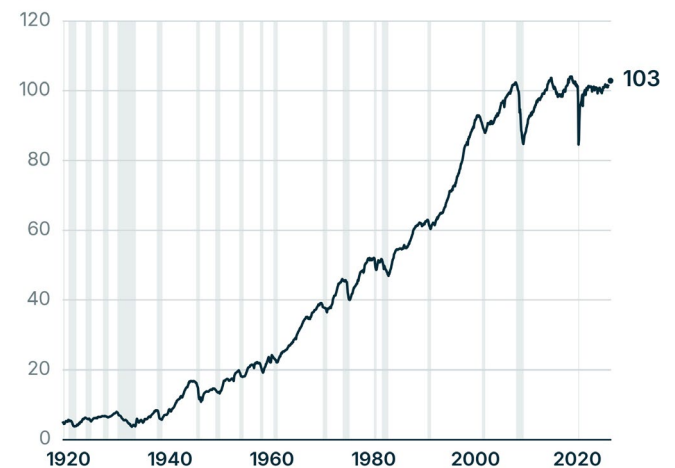
During that same period, software jobs, once considered the road to a certain future, have dried up. Economist Gad Levanon notes that overall software employment is now down to 2017 levels. Few would have expected that result a decade or two earlier. Had previous growth patterns remained steady, that sector would now include 250,000 more jobs.

In contrast, there is now growth in jobs making material goods. This is not an explosion in growth, but it is improved productivity in these jobs. According to a 2020 Kearney study, in 2019, for the first

time in a decade, the percentage of imported manufactured goods fell. They have fallen again recently, in part due to tariffs.

US industrial production is more than twenty times its 1919 level

Industrial production, total index, 2017 = 100. Shaded bands are US recessions



Source: Board of Governors of the Federal Reserve System, via FRED (INDPRO); NBER recession dates (USREC)

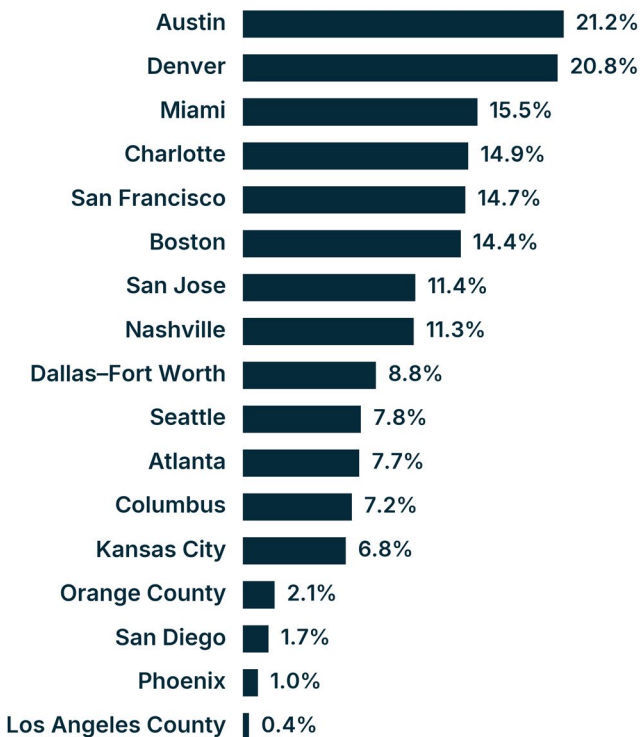
Figure 19

Cities like Miami, Charlotte, and Knoxville, none of them historically associated with industry, have seen the most robust industrial growth from 2015. Although greater New York showed impressive gains, the nation's long time industrial leaders, cities like Los Angeles, San Jose, and Seattle, suffered a marked decline.



Austin and Denver led growth in advanced industry jobs after Covid

Change in advanced industry employment, Q1 2021 to Q3 2023

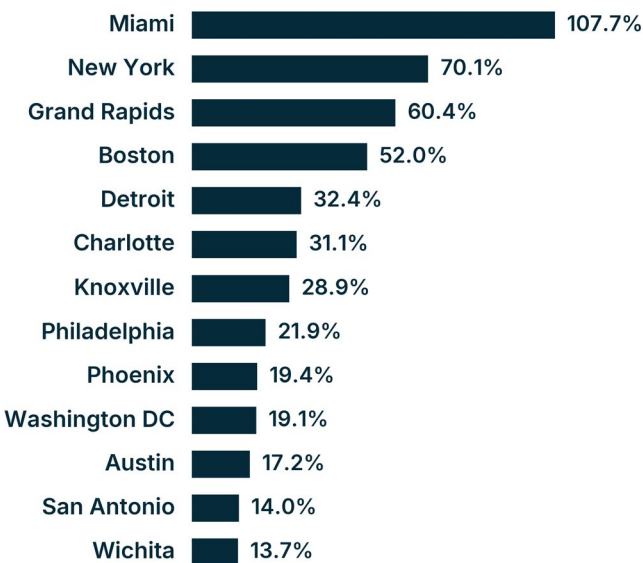


Source: Quarterly Census of Employment and Wages

Figure 20

Miami and New York led manufacturing job growth since 2014

Change in manufacturing employment, 2014–2025, among the top 50 metros by manufacturing employment



Source: Occupational Employment and Wage Statistics, BLS

Figure 21

The new industrial paradigm

Things are changing even within tech. Firms specializing in space and defense are on the upswing. “Hardware,” notes *The Wall Street Journal*’s James Meigs, “is back.” High-tech firms are increasingly applying technology to actual things, whether in the form of crewed rockets like Artemis and Space X, or on Ukrainian and Middle Eastern battlefields. The space industry’s resurgence, led by Elon Musk and NASA, in some ways returns America to its traditional identity as a real-world builder and innovator.

There is enormous potential here. Space industry global revenues are up tenfold since the early 2000s. The World Economic Forum projects that “by 2035, the space economy is set to reach \$1.8 trillion, up from \$630 billion in 2023 and averaging a growth rate of 9 percent per annum—a figure significantly above the growth rate of global GDP.”

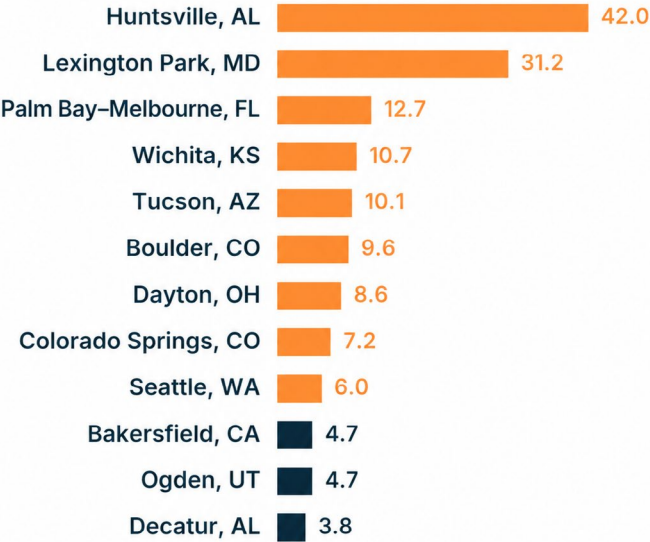
Building spaceships is not like developing algorithms. High-flying firms like Anduril, Palantir, and Space X use software to build actual gizmos that could both protect the country and enrich its people. These firms still rely on human skills from engineering to fabrication and assembly. “People are shifting to harder tech,” suggests El Segundo-based Varda Aerospace co-founder Delian Asparouhov, “There is an aerospace renaissance. This can’t be done with AI—you need people to build spaceships. It’s paradigm shift.”

Much of this growth will continue to flow to such traditional aerospace hubs as Southern California, San Jose, and Seattle, but the greatest per capita concentrations will include Huntsville, Melbourne, Florida, Wichita, and Tucson. The future suggests even greater dispersion; the largest new investments in aerospace have been in cities like Berkeley, Missouri; Fort Smith, Arkansas; Dayton, Ohio; Oklahoma City; and distant exurbs such as Mojave, California.



Huntsville and Lexington Park dominate aerospace engineering employment

Location quotient of aerospace engineering employment, May 2025. National average = 1

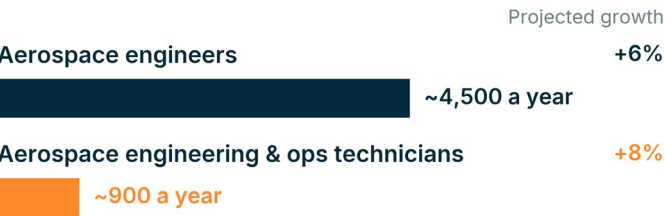


A further 23 metros sit between 1.1 and 3.8 times the national average

Bureau of Labor Statistics, Occupational Employment and Wage Statistics Figure 22

Aerospace engineers grow more slowly but offer far more openings

Projected annual job openings and growth rate, 2024-34



Aerospace engineers

- Commercial spaceflight expansion
- Small satellite viability
- Drone proliferation across sectors
- Fuel-efficient aircraft redesign

Aerospace engineering & operations technicians

- Increased accessibility to space
- Integration of computer & electronic instruments
- Advancements in hybrid-electric aircraft

Industrial Sage U.S. Manufacturing Investment Tracker Figure 23

Changes in the Employment Horizon

Counterintuitively, the rise of artificial intelligence could hasten a return to industrial values. A growing cadre of entrepreneurs see the future not in apps, video games, and social media, but in using tactile skills to perform tasks that AI cannot easily replace. The new technology is displacing the tech world’s former stars, the software writers, who are proving vulnerable to what economists refer to as “skills-based technological change.”

AI-generated scripts threaten even many “creative jobs,” including acting, writing, and journalism. AI programs can already outperform most college graduates in analytical abilities and basic writing or computation, and they can generate pictures, music, and poetry. We may be on the brink of a period that, as one study suggests, could bring “an unprecedented wave of displacement of mental labourers.” Right now, America seems “no country for young grads.”

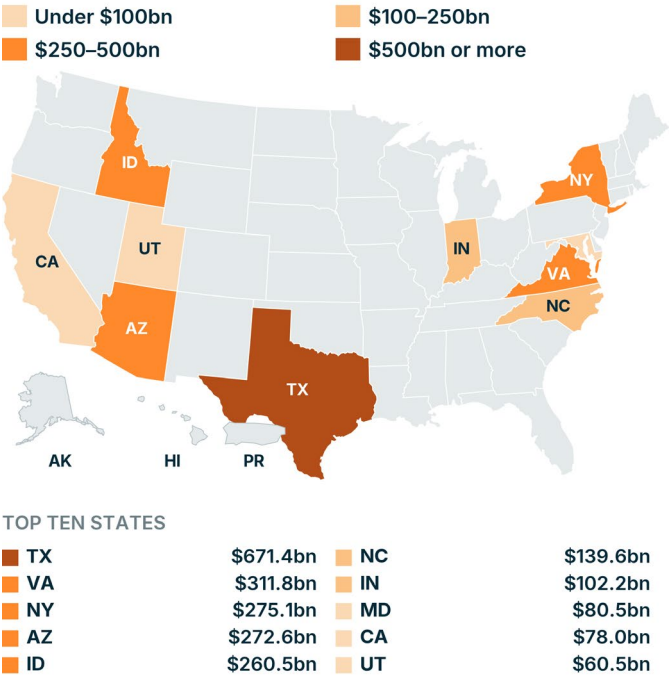
Yet even as the soft tech world recedes, traditional manufacturing-oriented communities in the vast hinterland are benefiting from re-shoring businesses and foreign investment. Indiana, Wisconsin, Michigan, Iowa, and Ohio as well as the more recently industrialized southern states such as Alabama, Arkansas, Mississippi, Tennessee, and Kentucky, dominate the list of states with the highest concentrations of industrial jobs. Many of these states also lead in new industrial investment, which is a key harbinger of future growth.



Ten states hold the published manufacturing investment total

Announced manufacturing investment since 2025, projects of \$50m and above. Grey states are outside the published top ten

ANNOUNCED INVESTMENT

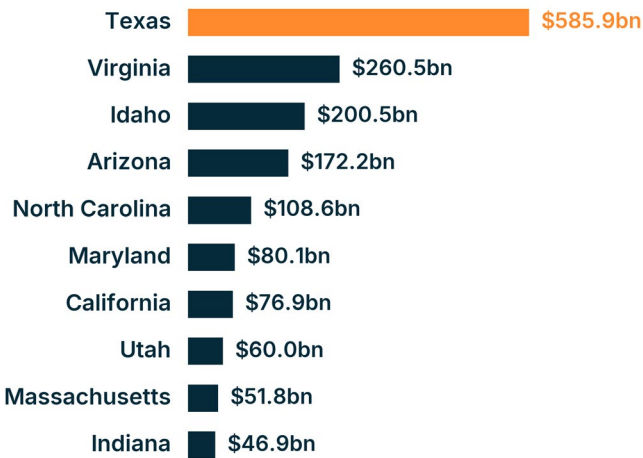


Source: IndustrialSage US Manufacturing Investment Tracker, 24 August 2026 (CC BY 4.0). Only the top ten states are published. Multi-state projects are counted in full against every state named, so these totals overlap

Figure 24

Texas has attracted more than twice the manufacturing investment of any other state

Announced manufacturing investment by state, 2025



Source: Industrial Sage manufacturing investment tracker

Figure 25

In the old Midwest, lower costs as well as their skilled work forces are powering job growth. Rustbelt regions are especially

well positioned here. The authors of “*The Smartest Places on Earth: Why Rustbelts are the Emerging Hotspots of Global Innovation*” write that self-driving cars, wearable devices, smart grid, and smart farming are all best developed in regions with a legacy of industrial expertise.

It is unlikely that manufacturing will become the prime source of new jobs directly, but it will act as a stimulus for the overall economy. Even though employment has remained relatively flat, manufacturing output has risen significantly in the past year and also over the longer term.

Manufacturing’s importance stems from the far higher multiplier effect it has on employment than jobs in the domestic service sector do, although high end business services also drive employment gains. According to one study, each new job in manufacturing creates 0.4 new jobs in other trade industries and 0.9 jobs in the local service sector, including retail and restaurants. In contrast, the multiplier effect on employment is low in the domestic service sector, with each public sector job creating only 0.25 additional jobs. Manufacturing’s disproportionate contribution to both productivity growth and job growth explains why, with the exception of a few tax havens and petro-states, the world’s richest and most developed countries tend to be manufacturing economies, rather than countries whose economies depend on services like tourism or commodity exports like agriculture and minerals.

AI and the skilled trades

Roughly thirty-five million Americans work in the trades. Software or robots are unlikely to replace plumbers and movers in the foreseeable future. It turns out that the future of work for many Americans may be less about analytical skills than about fixing and building things. The big opportunities now lie in building data centers, which

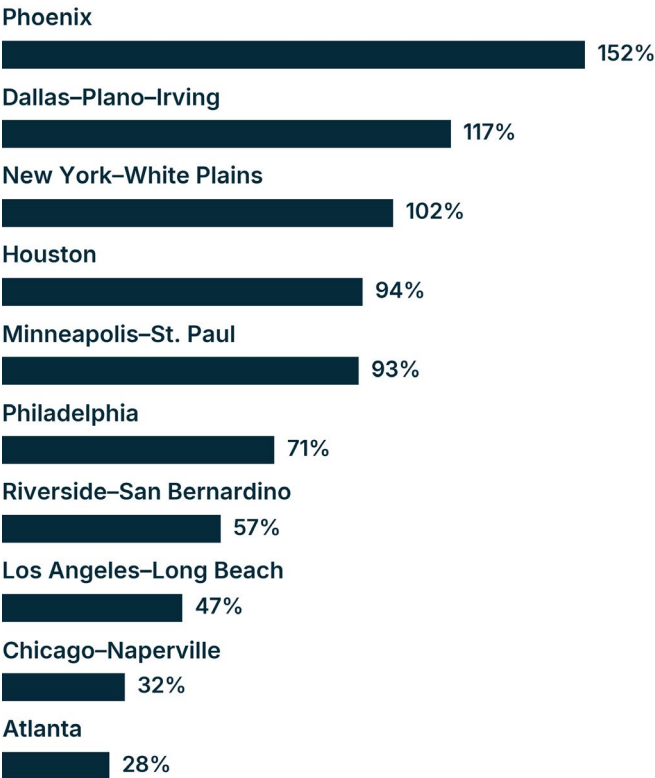


requires skilled tradespeople, as opposed to digital engineering. Remarkably Meta, the digital economy’s exemplar, has opened a center for practical skill training; the project’s first iteration, one focused on fiber installation, received 35,000 applications for one thousand openings.

Even as demand for some skilled trades is likely to grow, automation may eliminate other blue-collar jobs. In 2022, the highest percentages of skilled trade workers were found in transportation and material moving (39%) and production (25%). These jobs, which constitute 64% of all skilled trades jobs, may be vulnerable to technological innovations like self-driving trucks and robot warehouse forklifts. Skilled trade jobs may be more difficult to eliminate in construction and extraction (18% in 2022), installation, maintenance, and repair (17% in 2022), and farming, forestry, and fishing (1%).

Phoenix and Dallas more than doubled their blue collar workforce

Change in blue collar employment, 2014–2025, ten fastest-growing large markets



Source: Occupational Employment and Wage Statistics, BLS Figure 26

[Palantir’s Alex Karp](#) notes that the future job market favors either the extreme tech whizzes (at least until the machines catch up) or occupations difficult to replace with robots. AI entrepreneur Rony Abovitz suggests that the “sophisticated, technically capable blue-collar worker” could be among AI’s biggest winners. This is not so much a return to assembly line drudgery, but to advanced manufacturing jobs that are growing even as some traditional industrial employment may decline.

The AI era’s changing workforce

One of AI’s most profound implications is its effect on education. In the past, having one, two, or even three degrees was seen as a ticket to a good job. But just having a degree is not sufficient, and by some analyses, more degrees may not be as useful in an era when AI can perform many tasks more efficiently. Even major employers are de-emphasizing academic credentials in favor of practical skills, experience, and practical problem solving.

In the emerging AI economy, even practiced “geeks” are vulnerable to what economists refer to as “skills based technological change.” Despite big tech companies’ soaring profits, AI programming tools have been widely tied to massive layoffs, including at companies like Amazon, Intel, Meta, and Microsoft. Even startups like Block, a fintech run by Twitter co-founder Jack Dorsey, have recently laid off many employees. In the first three months of 2026, there were 52,000 tech layoffs, up 40% from 2025. Walmart now projects that AI also will accelerate the loss of some blue-collar jobs such as warehouse workers. M.I.T. predicts at least 10% of all U.S. jobs are at risk overall. But at least in the short run, the pain will be greater in places like Silicon Valley, which is the epicenter of AI development. A recent study by Joint Venture Silicon Valley predicts that AI threatens upwards of 400,000 jobs in the area. So too does it threaten those

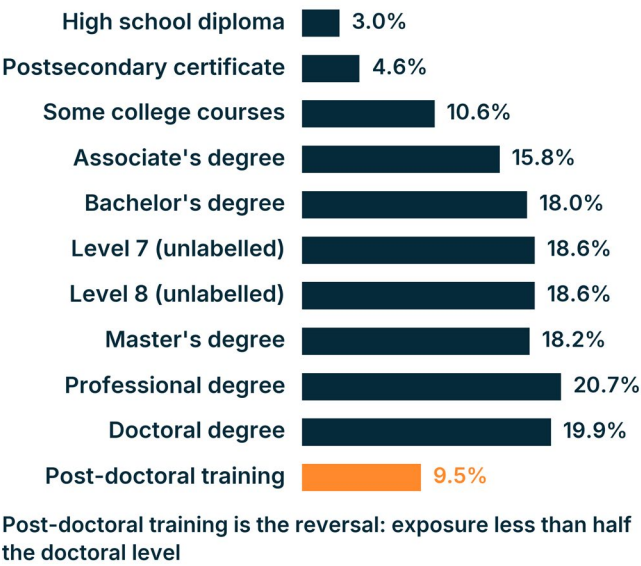


occupations built to service tech elites’ marketing, accountancy, and legal needs.

San Francisco and San Jose are suffering the nation’s biggest employment declines in these fields. This pattern is also spreading to the broader professional classes. Employment in most business service fields such as publishing, marketing, educational services, and content creation have either flatlined or declined. Goldman Sachs, for example, now claims that AI reduces office jobs far faster than new ones can be generated. In a recent survey, two-thirds of business leaders suggested ChatGPT will lead to large layoffs of white-collar workers over the next five years.

Exposure to LLMs rises with education, then collapses beyond doctoral level

Share of jobs affected by large language models, by typical education level required



Source: US Bureau of Labor Statistics, via Forrester. Values measured from the published chart, which carried no data labels **Figure 27**

Revising the education system

The education system has been slow to adjust to these realities. Today corporate leaders in firms like Amazon and Walmart are forced to look more to specific training programs rather than rely on the colleges and universities for workforce development.

Much of this reflects academia’s ideological indoctrination and lower standards. At Harvard, 60% of grades are As compared to 25% two decades ago.” This is occurring even as students enter college less academically prepared than in the past. A report from the University of California revealed that increasing numbers of students require instruction in mathematics at the high school and even elementary level.

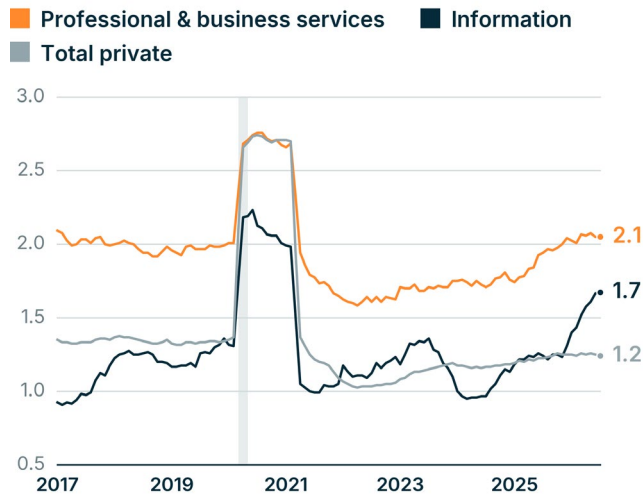
A recent N.I.H. paper asserts that college students increasingly suffer from “brain rot” that affects their cognitive abilities. Employers report that recent graduates are short on critical thinking skills. Gallup reports that overall, the percentage of Americans who express “a great deal of confidence” in education has fallen in the past decade from 60% to 40%.

This decline has occurred during a decades-long, massive increase in college enrollment, which increased almost 80% between 1970 and 2010. The mass production of liberal arts majors in particular, which is a source of employment for academics, seems oddly removed from basic reality. America may be running low on skilled workers, doctors, medical technicians, and aerospace engineers, but it faces no such problem with post-modernist English professors. There are very few new jobs in academia, particularly at the tenure level. Fields like history, English, and philosophy, which were captured by the ideological left, are losing the most students.



Layoff rates in professional services and information are climbing again

Layoffs and discharges rate, 12-month moving average. Shaded band is the 2020 recession

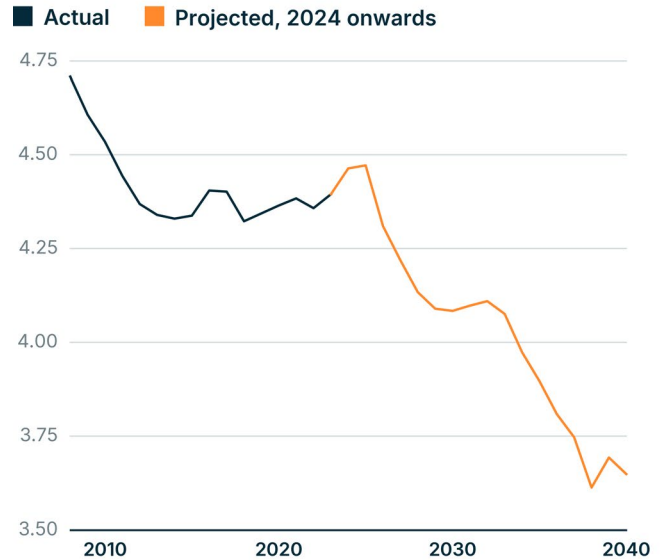


Source: Job Openings and Labor Turnover Survey, BLS, via FRED (JTU540099LDR, JTU5100LDR, JTU1000LDR) **Figure 28**

In contrast, though they face D.E.I. pressures, less radicalized fields like business, engineering, and hard sciences generally offer more promise both for students and society. But for many young people, going to a trade school or simply entering the workforce is a more likely and better option. This paradigm will also decline as the number of 17-year-olds continues to drop.

The number of 17-year-olds peaks in 2025, then falls for fifteen years

Estimated number of 17-year-olds in the United States at the start of each school year, millions



A fall of about 820,000 from the 2025 peak — down 18% by 2040

Source: US Census Bureau, via The Chronicle. Projections based on 2023 population data and exclude immigration. **Figure 29**

Young people and their families are increasingly looking towards skills-based, career alternatives. Since 2010, undergraduate enrollment has dropped from 18.1 million to 15.4 million, and the percentage of B.A.s headed to graduate school has fallen precipitously over the past two decades. Over the past decade, five hundred U.S. private schools have closed, which is three times the closure rate of the previous decade, and another four hundred or more will shutter their doors over the next decade.

A recent Gates Foundation study suggested decreasing interest among those under 30 in four-year college degrees and greater interest in trade schools, particularly at a time when many skilled jobs remain unfilled, is a sentiment most parents share. The proportion of young people attending vocational schools has grown by 16% in 2023 to the highest level since 2018. This marks a major attitudinal shift. Americans have more faith in two-year colleges, where over 40% of undergraduates are enrolled, than in four-year schools.



This is a well-advised shift towards tactile skills. According to the Federal Reserve Bank of New York, even among those who finish university, more than 40% of recent graduates aged 22 to 27 are underemployed, meaning they are working in jobs that do not require their degree. These young people, who include industrial workers and entrepreneurs, are on the front lines of creating what could evolve into an American “industrial commons.”

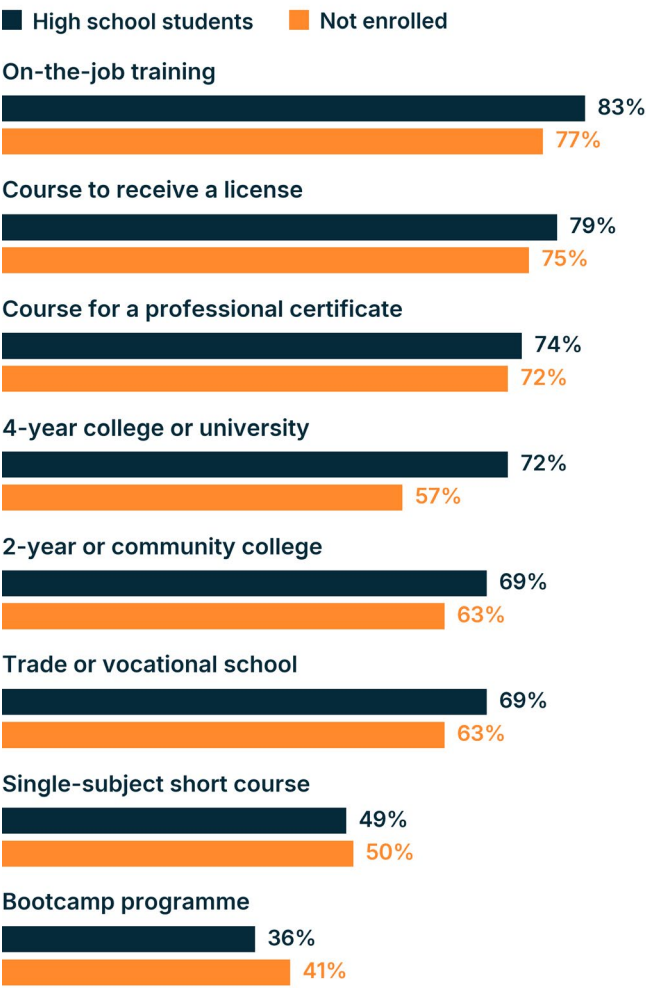
The growing need for practical skills

Arvind Kaushal, leader of the manufacturing practice at Booz & Company, estimates that there will be some 600,000 new manufacturing jobs opened in this decade. Part of the problem is an aging workforce: the proportion of the skilled manufacturing workforce over the age of fifty-five has doubled in the last ten years, and 50% of the active workers are above the age of forty-five.

These realities are changing the attitudes of both younger people and their parents. One recent survey found that roughly 83% of Gen Z, including 90% of those who already hold college degrees, feel that learning a skilled trade can be a better pathway to economic security than college. Even as college enrollment has fallen a full 11% in the past decade, enrollment in trade schools has grown by 10%. During the same period, the percentage of elite college bachelors going to graduate school has plummeted.

Teenagers rate on-the-job training and licences above a four-year degree

Share rating each option excellent or good value, 2023 survey



Source: Gates Foundation, Value of Education and Training Opportunities, 2023 **Figure 30**

Colleges can continue to play an important educational role by stressing practical skills such as industrial, chemical, or civil engineering that are critical to the production of goods. The five fastest-growing fields for engineers are in biomedical, petroleum, and civil engineering.

Meeting the new demand

The shifting employment landscape requires a new focus on practical skills. When Ford recently opened for five thousand mechanic jobs, some paying \$160,000, they struggled to find takers. Navy Secretary John Phelan notes that there is an unmet demand for such workers, but the jobs must more than what they would make at an Amazon warehouse, retail store, or restaurant.

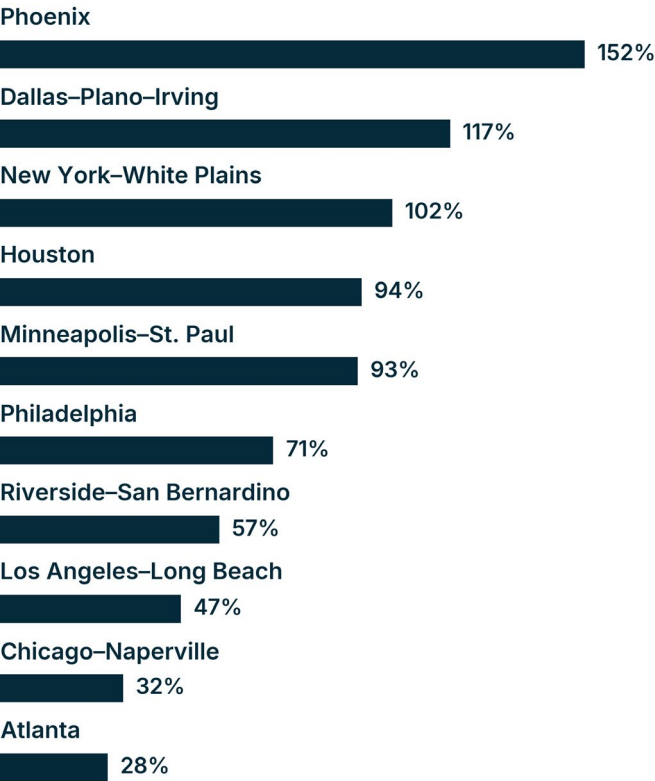


Some states are rising to the challenge. Ohio, where new plants are growing in numbers second only to Texas, concern over worker training and recruitment has led to a proliferation of training programs. Kentucky, Nebraska, and Tennessee also have developed flexible training programs modeled on the successful approach European countries like Germany, Sweden, and Denmark have employed.

The shift to a material economy could accelerate the demographic trends discussed in Part One. The blue-collar workers who operate these new facilities have good reason to seek their futures in the smaller or peripheral communities that offer them the best chance of achieving a middle-class standard of living.

Phoenix and Dallas more than doubled their blue collar workforce

Change in blue collar employment, 2014–2025, ten fastest-growing large markets



In contrast, traditional big manufacturing metros like Los Angeles and San Jose are among the worst for blue-collar workers and increasingly lag even states like Mississippi and Alabama in terms of educational results. The high cost of living, which high taxes and regulation exacerbate, have been squeezing out smaller industries and other businesses that offer working class employment in these traditional manufacturing states. A *New York Times* survey of the best places for good jobs for workers without four-year degrees identified cities like Toledo, Ohio; Anchorage, Alaska; Des Moines, Iowa; and Birmingham, Alabama among the best eight regions.

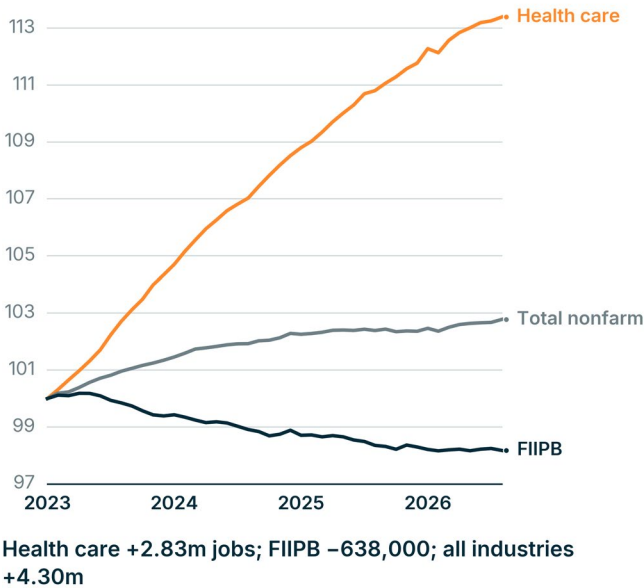
Service sector jobs: from “learn to code” to “learn to care”

Most Americans will continue to work in the service sector. Fears of mass unemployment in a jobs apocalypse are likely to be unfounded, but there will be real and wrenching changes in service sector employment. The most important change will be the long-term rise of health care and elder care. Two trends will cause this: the U.S. and other low-fertility nations’ aging populations, and the falling costs of many medical goods and services that may make them accessible to people with lower and lower incomes.



Health care is pulling US employment up while professional services falls

Employment, January 2023 = 100. FIIPB is finance, information and professional & business services



Source: Current Employment Statistics, BLS, via FRED Figure 32

In 2024, total factor fertility (T.F.R.) in the U.S. sank to a record low of 1.62 births per woman in a lifetime. Absent an unprecedented and unlikely expansion of native fertility or a politically unthinkable increase in mass immigration, the result of this trend will be that the elderly will make up an increasing share of the U.S. population in the rest of this century, while the proportion that is young will decline. In itself, population aging need not be a problem, particularly if medical advances can extend the period of active and healthy life for all Americans. But even with new technology assisting, a growing share of the population will need family caregivers or paid workers to provide personal care. At the same time, the health care share of the U.S. economy will grow, because the elderly disproportionately consume it.

The growing importance of health care in the service sector is already reflected in current jobs statistics. According to the Bureau of Labor Statistics, the category of “home health and personal care aides” between 2024 and 2034 is projected to add nearly

740,000 jobs, which is nearly three times as many as each of the next three categories: software developers (267,700), stockers and order fillers (235,000), and fast food and counter workers (233,200). The latter three jobs are more vulnerable to automation, so the disproportionate share of health and home care jobs among all new jobs will likely increase over time.

Healthcare leads on both the rate and the scale of projected growth

Projected change in employment by industry sector, 2024–34. All industries +3.1%



Bureau of Labor Statistics (BLS), Occupational Outlook Handbook Figure 33

Hospitals are already the sixth largest U.S. employers. Twelve percent of the American workforce is employed in ambulatory care services, hospitals, and nursing or residential care institutions. That percentage is higher than the share of the American workforce in manufacturing (8%).



Downtown office towers of transactional cities filled with floor after floor of clerical workers and managers were a symbol that characterized the mid-twentieth century. By the mid-twenty-first century, medical complexes like the Texas Medical Center in Houston, nicknamed “the medical mini-city,” may be the symbol of the new, dominant, service sector economy. The Texas Medical Center employs more than 100,000 people, receives ten million patients a year, and boasts the world’s highest concentration of clinical and biomedical research facilities. To meet the area’s shift to outer suburbs, the Medical Center is busily building another huge medical complex in the region’s distant western reaches.

The emerging health care economy shares two characteristics with the resurgent hardware economy in the traded goods sector. First, many if not most new health care jobs are likely to require on-the-job training and skills certification rather than traditional four-year- college degrees. Additionally, like the hardware sector, the health care sector is poised for growth in the low-density urban periphery. New hospitals, urgent care clinics, and medical offices will often be located outside of dense urban areas in the suburbs and exurbs, where most Americans will live and where real estate and operating costs are cheaper. Already former shopping malls, big box retail stores, and office buildings in American suburbs are being repurposed as medical centers.

In Nashville, for example, One Hundred Oaks Mall has been converted into a “medical mall,” occupied in part by Vanderbilt University Medical Center. Dover, Delaware has converted Blue Hen Mall into a medical and government services center, while Pennsylvania Main Line Health has converted 32,000 square feet of Exton Square Mall into an ambulatory care and M.R.I. center. In the Redbird suburb of Dallas, the UT Southwestern Medical Center is an anchor tenant on the site of a former Sears store in The Shops at Redbird. Columbus, Indiana has combined two of the growth industries in the service sector of the AI-influenced future—health care and amenity

and recreation. There, the former Fair Oaks Mall has been transformed into Nexus Park, where Columbus Regional Health shares space with shopping and dining options, a recreation center, and walking trails.

A new infrastructure and governing philosophy

Neither the emerging hardware or health care economies are likely to locate to the great legacy cities, or even to the most elite metropolitan areas, but to the periphery’s new geography of opportunity. Achieving this goal will require new approaches to infrastructure and governance and the continued production of housing that can keep living costs affordable.

Policies created during the first industrial revolution and later by the rise of the digital sector cannot meet our future social and economic needs. As the economy changes and people disperse, we need a whole new approach to how we house, govern, and imagine our cities.

Part Three

Making The Opportunity City



“A great city is not to be confounded with a populous one.”

Aristotle

Progressive urbanists peddle a familiar vision of their ideal city of the future. It is dense, filled with high-rise neighborhoods where people walk or ride bicycles or buses. In the distance, high-speed passenger trains whiz past white windmills and solar panel clusters that generate the city’s clean energy. No one privately owns a car, and fossil fuels have been eliminated. The urban planners, academics, journalists, and non-profit advocacy groups who belong to the school of progressive urbanism promote variants of this utopian vision with evangelical fervor.



As we showed in Part One, this utopian vision stands at odds with long-standing and continuing social trends driven by decisions families and businesses are making. Urban density has been trending down for years. As we discuss below, rather than lowering prices, imposing density on cities and towns achieves the opposite effect. Big cities, for the most part, are losing residents

to domestic migration because they no longer serve people’s needs or meet their aspirations.

Opportunity cities will be those that meet not the challenges from half a century ago, but the challenges of the *next* half century. Developments in technology, combined with economic trends and ordinary workers and homeowners’ preferences, ensure that the future landscape will be more decentralized, more suburban, and more exurban, and even more small town-based than it is today. We can also hope that opportunity cities will develop the infrastructures appropriate for the next urban era.

Housing the opportunity city

One of the most daunting immediate challenges is how we will house our future population. Governments’ equally important challenge is how to create a regulatory environment that promotes housing development. Governments that are open to meeting market demands, like those in Texas, differ markedly from those that impose restrictions on the development that most Americans are choosing, that is, single-family homes, located largely in suburban, exurban, and small-town environments, including on the far outskirts of New York. In many cases, land costs, which regulations often increase, is the primary factor influencing Americans decision to move out of cities.

Along with inflation, young Americans rank housing as their top financial concern. They worry about attaining the foundations of middle-class life, which includes spacious and affordable housing. A March 2025 Institute for Family Studies report, *Homes For Young Families: A Pro-Family Housing Agenda*, found that since 1970, the share of young adults who own their home has declined from 50% to around 25-30%. The best hope for many of them lies with inheritance. This may be reasonable for the offspring of the upper-middle class, who



own up to \$35 trillion in home equity, but not ideal for all others.

Each generation owns less at the same age than the one before

US homeownership rate by birth decade, by current age

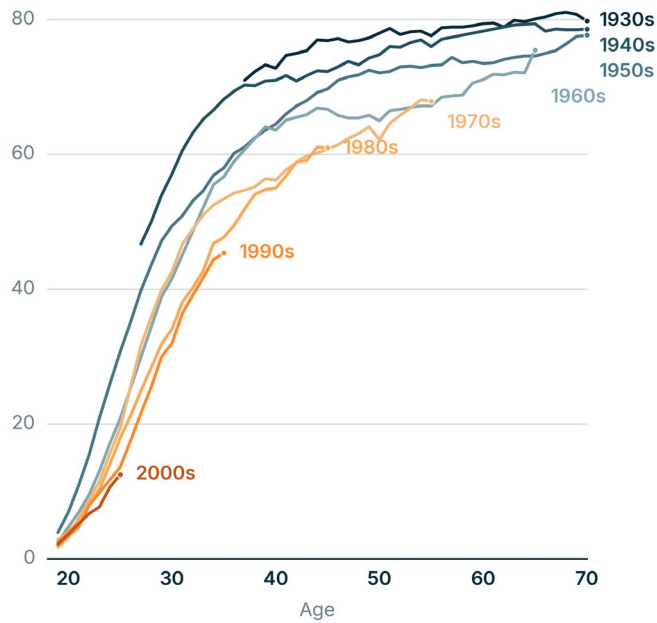


Chart after @ryanradia. Source: author's calculations from the Current Population Survey ASEC 1976–2025 via IPUMS-CPS.

Figure 34

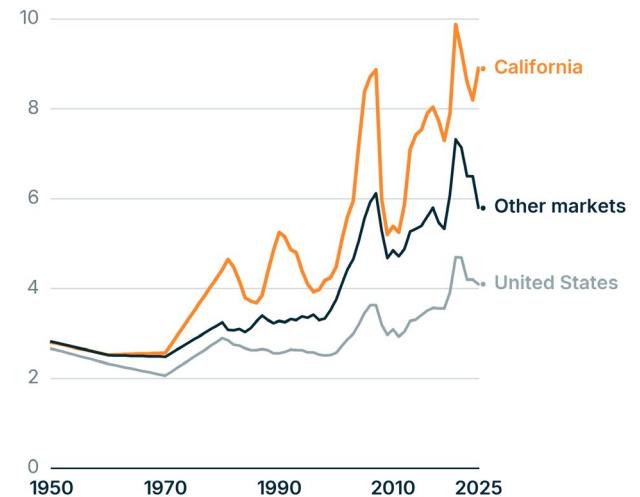
Some libertarians propose ending zoning, thus giving developers free rein in historically lower-density neighborhoods, as a solution. This is unpopular even in California, where, according to a poll by former Obama campaign pollster David Binder, a large majority opposed legislation Governor Newsom signed in 2021 that effectively banned single-family zoning in much of the state. Some also openly support movements by Wall Street firms such as Blackstone and U.K.'s Lloyds Bank to buy homes in hot markets and turn them into rentals, thus boosting home prices and laying the foundations for what they claim will be a future “rentership” society.

This density-first approach, however, does not lower prices, as is sometimes suggested. In fact, U.S. data suggests a positive correlation between greater density and housing costs. Among fifty-three major

metros, those with *more* single-family housing and *larger* lot sizes (key indicators of *lower* density) have substantially better housing affordability. One recent study found the median income family in highly regulated San Jose or San Francisco would need 125 years (150 in Los Angeles) to save for a down payment on a median priced new home in those cities; in Atlanta and Houston, the figure is twelve years.

California house prices have risen from under three times income to nearly nine

Median multiple: median house price divided by median household income



California peaked at 9.9 times income in 2021, against 4.7 nationally

Derived from Census Bureau, Harvard University and Demographia.

Figure 35

As in so many areas, the essential problem lies in the disconnect between public preference and progressive policy mantras. Despite recent reforms, regulations in California remain aimed at curtailing suburban development. In fact, despite the 97% of Californians who commute by car, legislation added new penalties for areas where driving is the predominant mode of transport. Not surprisingly, California has the second-lowest homeownership rate in the nation at 56% (at 54%, New York's is the lowest). These policies are particularly destructive for young people's aspirations.

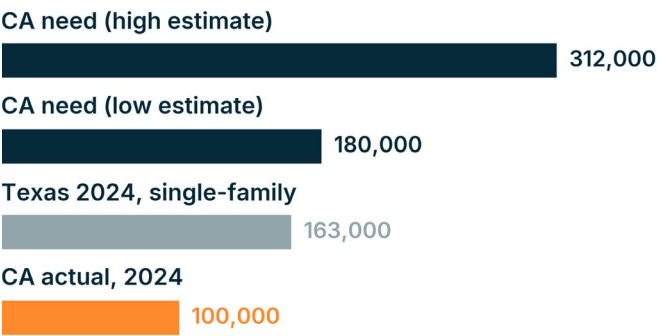
In contrast, states like Texas where building is less regulated function far more freely.



Prices certainly might rise with demand, but when production grows rapidly, as it has in places like Phoenix, Austin, and Dallas, they also inevitably decrease when supply becomes too robust. This lowers prices for both buyers and renters. New Zealand, once an ultra-expensive locale, recently applied similarly liberal land policies with comparable results.

California builds about a third of the homes it says it needs

Annual housing production and estimated need



A shortfall of 80,000 to 212,000 homes a year

Source: California Department of Housing and Community Development, 2025 Statewide Housing Plan; Texas Real Estate Research Center, Texas A&M University

Figure 32
Figure 36

If the government allows it, technology could also contribute to affordability. Unlike most other industries, home-building has made few innovations since the 1950s. More affordable, manufactured, and modular homes, perhaps eventually constructed by AI-enabled robots, could reduce costs. According to a 2019 McKinsey & Company report, modular housing has the potential to speed up construction by up to 50%. An even more promising technology may be the use of 3-D printers to build new homes at far lower prices.

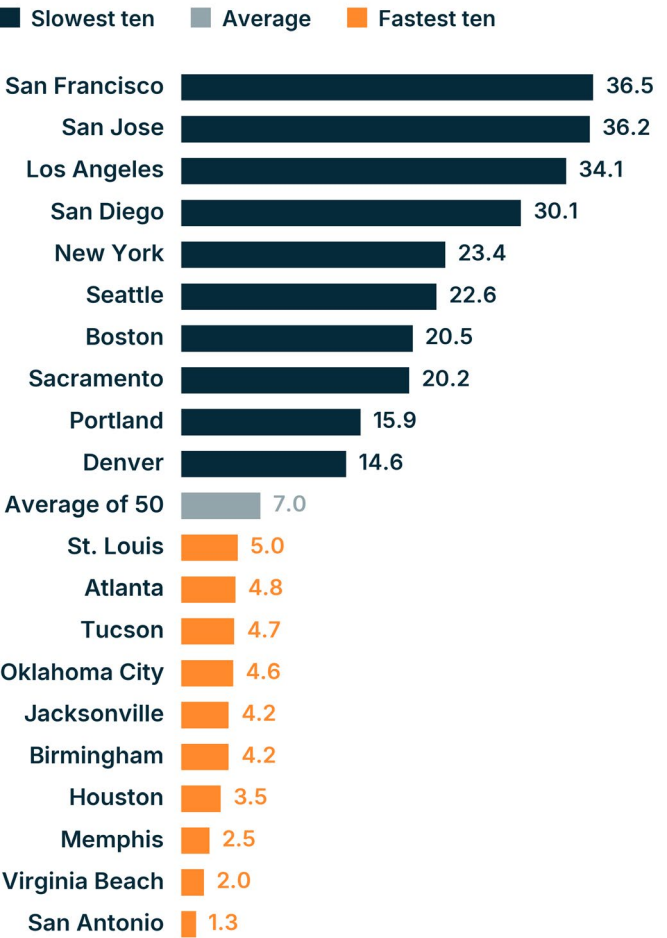
The social and political costs of poor housing policy

Addressing the housing crisis is a prerequisite for restoring upward mobility, particularly for the young. In 1950, more than half of 30-year-olds were married and

owned their own homes; by some estimates, that figure is now barely one in eight. Simply put, every generation born between the 1930s and 1960s has achieved close to 80% homeownership in the U.S., but those born in or after the 1970s are lagging. Goldman Sachs expects this situation to worsen in coming years.

Saving a deposit takes 36 years in San Francisco and 1.3 in San Antonio

Years of saving required for a down payment. The ten slowest and ten fastest of 50 major markets



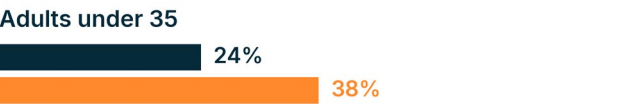
Source: National Association of Realtors. ¹

Figure 37



California’s homeownership gap is widest among under-35s

Homeownership rate, California and the United States, 2023



Gap to the national rate: 9 points for all adults, 14 points for under-35s

Source: US Census Bureau, Housing Vacancies and Homeownership (CPS/HVS); American Community Survey 2023

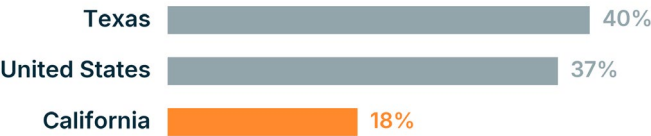
Figure 38

The housing crisis also undermines the future of the family. In the U.S., a new Institute for Family Studies analysis of 2020 Census data found that one in six women were “child-free” by the time they reached the end of their childbearing years, up from one in ten in 1980. Indeed, the share of U.S. adults aged 25–54 without partners has risen from 29% in 1990 to 38% in 2019. Expanded home ownership could prove one way to boost sagging fertility.

Unless we address this fertility decline, it suggests a troubling future. Marriage is a key element of success that leads to higher incomes, lower child poverty, and higher fertility rates. Dropping marriage and fertility rates could reduce demand for such things as houses and accelerate economic decline. Economist Gary Becker notes that, over time, the dearth of young people could also undermine our innovative economy, which we already see happening in East Asia and Europe’s slowdowns.

Only 18% of California households can afford the median home

Share of households able to afford the median-priced home, 2025



Texas households are twice as likely as Californian ones to afford their state’s median home

Source: California Association of Realtors, Q4 2025 Traditional Housing Affordability Index; National Association of Realtors, 2025

Figure 39

The Great Dispersion described in Part One could play a critical role in counteracting these troubling demographic trends. As we pointed out, as legacy cities become more single-orientated and left-leaning, far fewer children are born there. The highest birth rates are in cities and towns with fewer than 250,000 residents.

None of this suggests we favor a one-size-fits all model of housing and neighborhood structure. There is room for far-flung exurbs and dense, walkable communities alike. Instead of favoring one option, public policy should focus on the basics and let American families and firms expand as their market preferences and social needs require.

Work location

Progressive urbanists are as mistaken about the future of work and workplaces as they are about energy and transportation. New urbanists envision high-density, car-less utopias filled with happy, attractive people strolling and bicycling in tree-lined streets and parks in the shadow of tall buildings and distant high-speed passenger trains. But where do these people work?

In the late twentieth and early twenty-first centuries, a small number of “superstar” cities with highly developed metropolitan areas experienced a renaissance in their



urban cores. Mainstream Americans did not drive it. Instead, three groups powered this gentrification: rich people who wanted to live in prestigious urban locations among other rich people; the two classes of their retainers—menial servants and service workers—who were disproportionately immigrants from other countries; and college-educated professionals, many of whom had family wealth and connections.

Meanwhile, many working-class and middle-class people, including immigrants, migrated to cheaper suburbs in the same metro area or from high-cost states like California and New York to states like Texas and Florida with lower taxes and cheaper real estate. The native-born poor of these superstar cities often remained because local welfare systems that provided housing, food, and income locked them in. What remained of the middle class tended to be public sector employees, teachers, police, and first responders who enjoyed enough wealth to afford housing in exurbia or even a neighboring state.

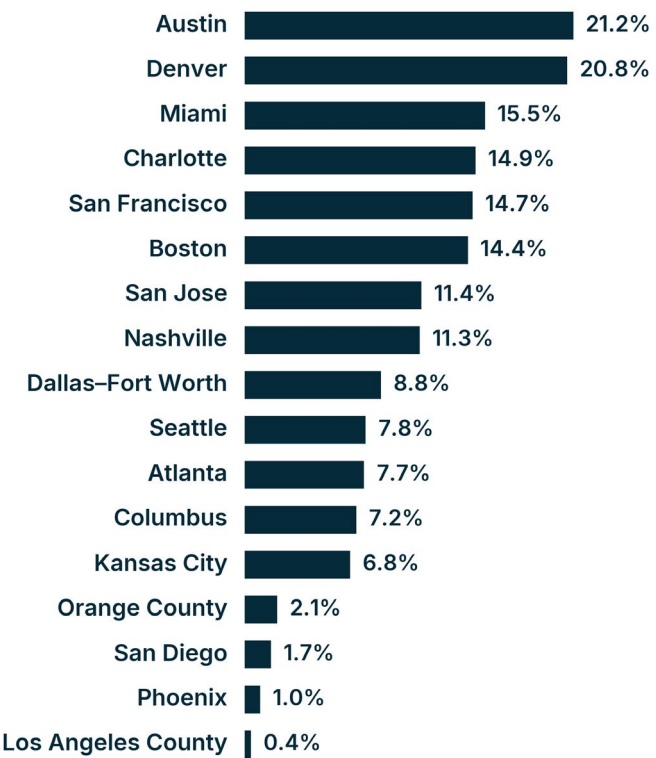
Superstar cities depend on the steady inflow of these three populations—the rich, the low-wage immigrants who perform menial jobs, and college-educated professionals. That inflow is now in danger of diminishing. Progressive Democrats enjoy one-party control of most large American cities, and their enthusiasm for wealth taxes on the rich is driving billionaires to other cities and states. As they leave, they take much of the urban tax base with them. AI-driven shifts, as discussed in Part Two, will accelerate these trends.

It seems likely that most “jobs of the future” will be found in low-density areas outside of CBDs. New industrial structures like data centers and logistics and manufacturing facilities tend to be located in suburbs or rural areas with low real estate costs. Opposition to data centers is growing; in the future, it may only be feasible to build them in remote areas and only with strong

incentives. As discussed in Part Two, the jobs of the future will be different from those that drove the legacy cities’ ascendancy. According to the Bureau of Labor Statistics, the traditional clerical office jobs that powered the legacy city will not be the biggest demand for new jobs between 2024 and 2034.

Austin and Denver led growth in advanced industry jobs after Covid

Change in advanced industry employment, Q1 2021 to Q3 2023



Source: Quarterly Census of Employment and Wages Figure 40

At the same time, many managers and professionals will be able to work remotely or in suburban offices closer to their home, making spending fortunes on downtown office space an unnecessary expenditure for firms. Similarly, passenger rail and mass transit will remain insignificant in the U.S in part due to rising perceptions that they are unsafe, making any material increase in patronage unlikely. UCLA researcher Anastasia Loukaitou-Sideris has found that fear of crime and harassment can result in potential patronage avoiding transit altogether.”



Airports—also morally questionable among greens and progressives—will remain important for passenger travel and freight transportation. Urban theorist John D. Kasarda’s “aerotropolis” envisions new residential and commercial areas growing up around them. Unlike the utopia of progressive urbanism, the real infrastructure of the future will serve most Americans’ economic interests and lifestyle preferences.

King car

We must consider prevailing demographic and economic shifts when deciding the best future transportation investments. The U.S. population is continually churning; mass transit is not an effective substitute for large numbers of commute trips. The chart below, derived from University of Minnesota data, illustrates this. Overall, among fifty large U.S. metro areas, the average commuter can reach nearly one hundred times as many jobs in thirty minutes by car than by transit. Autos—and future autonomous vehicles—offer the great advantage of allowing drivers to park their cars within walking distance anywhere in the metro area. This is impossible for many destinations when using transit.

Working from home more than doubled while driving alone fell

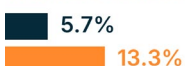
Share of US workers by means of travel to work

■ 2019 ■ 2024

Drive alone



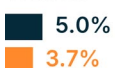
Work from home



Car pool



Transit



Derived from University of Minnesota data

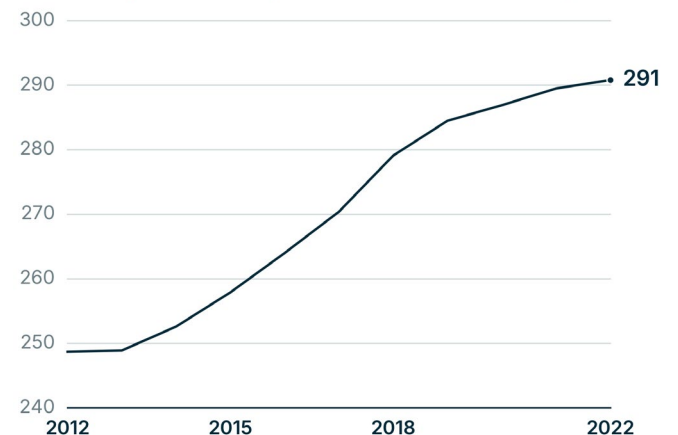
Figure 41

The progressive urbanist vision also misunderstands freight and passenger transportation. It has been a century since the auto enabled the replacement of most forms of fixed-rail freight and personal transportation. Electric batteries may eventually replace internal combustion engines, and smart, self-driving trucks and cars may become the norm, but for now, autos offer superior flexibility of point-to-point travel.

Meanwhile, the half-century histrionic urban ideologues have spent denouncing “sprawl” has failed to discourage private car ownership and usage in the U.S. More than 90% of American households own at least one vehicle. According to the U.S. Census Bureau, no more than 4% of Americans commute by public mass transit in any form, including buses.

The US vehicle fleet has grown by 42 million since 2012

Cars and light trucks in operation in the United States, millions



Source: Hedges & Company. Figures for 2021 and 2022 are projections

Figure 42

Personal cars vastly increase the geographic range in which individuals can choose among stores, schools, recreational opportunities, and jobs. Access to individual car use is particularly important for low-income people whose employment often requires them to travel to areas the fixed-route public transportation systems does not cover. Overall, in most places, the transit systems critical to dense urbanism are in poor shape. Remote work’s rise has further devastated



them.

Some older metro areas, notably New York, with one of the world's largest central business districts, still need transit at a large scale. Overall, however, transit market share has been sliding downhill for a generation. Newer, faster growing metros such as Dallas-Fort Worth, Houston, Denver, Seattle, Portland, Miami, and Charlotte, have been attempting to lure significant shares of transit commuters, but even passionate transit advocates have acknowledged that these efforts have failed abysmally.

Perhaps most shocking has been the consistent underperformance of transit in both Los Angeles and the San Francisco area, both of which have high density and significant office concentrations in and around their central core. According to the Eno Foundation, Los Angeles has spent at least \$20 billion on 125 miles of urban rail projects (subways and light rail), while changing commuting patterns very little. The L.A. system has failed to increase the share of riders that rode the bus-only system three decades ago.

Extraordinary markets like New York aside, mass transit was already stagnating or declining in many cities even before the pandemic. In cutting edge Austin, the transit market share is under 7% and the city's plans to boost this to 50% seems highly unlikely, in part do the growth in ride share and particularly autonomous taxis.

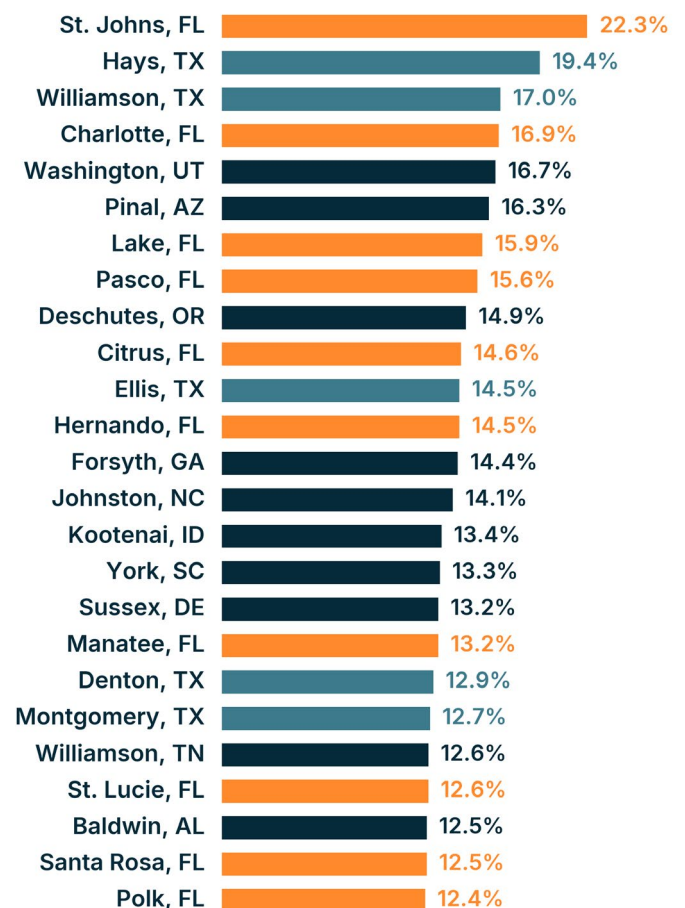
Building where the growth is going

The creation of new cities has a long history that dates to the "garden cities" ideal of Britain's Ebenezer Howard. The New Deal's progressive visionaries made numerous attempts to build new cities in the countryside that would allow people to live and work in a semi-rural environment. Today private corporations carry out much of this work, rather than the government, and the cities of the future are already here, and include some of the most successful and fastest-growing places that are virtually

all in the exurbs. The population in the fifty highest growth counties grew at 7.5 times the rate of the other more than 3,100 counties from 2015 to 2020. Moreover, the highest growth counties (including county equivalents) had 1.8 million net domestic migrants. Virtually all the fastest-growing fifty counties in the country are suburban, exurban, or within about two hours of these areas.

Florida and Texas hold 15 of the 25 fastest-growing counties

Population growth from net domestic migration, 2015–2020.
Florida counties in orange, Texas in teal



Derived from Census Bureau population estimates

Figure 43

A British study found that people who live in suburbs report higher levels of happiness than those who live in dense urban areas or in the countryside. Studies in the U.S. confirm this: people in suburbs or rural areas tend to be happier than urban core dwellers. Most Zoomers and Millennials are already prefer living in the suburbs to dense cities.



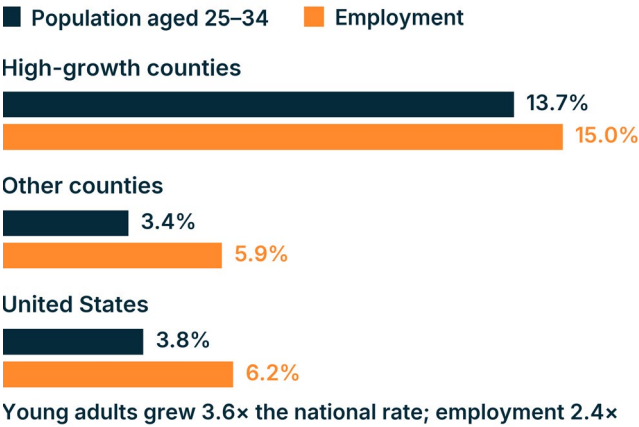
This contrasts with new urbanists’ assertion that the nation’s now largest generation had little interest in returning to the cul-de-sacs of their youth and would reverse the decades old pattern of suburban dispersal.

Even before the pandemic, observers noted that even distant suburbs were evolving into a kind of “hipsturbia,” with innovative retail, restaurants, and cultural amenities. Robert Shottenstein, C.E.O. of Columbus-based builder [M/I Homes, Inc.](#), with projects in the Midwest, Southeast, and Texas argued: “This is a flight to safety and security. The millennials are getting older and they are transitioning as the start families.” Overall, the population growth among 25–34-year-olds in the highest growth counties easily beats the national rate. From 2015 to 2019, these counties had an increase of 12.8% in 25-34 households. This is 3.8 times the 3.4% growth rate in the other counties.

The highest growth counties also have a far higher school age children per household than the nation (0.66 compared to 0.43 for the other counties). These areas are also increasingly popular with minorities, who make up a large share of new buyers. Preferences are particularly marked among Latinos, now by far the largest share of new Americans.

High-growth counties outpaced the nation on both young adults and jobs

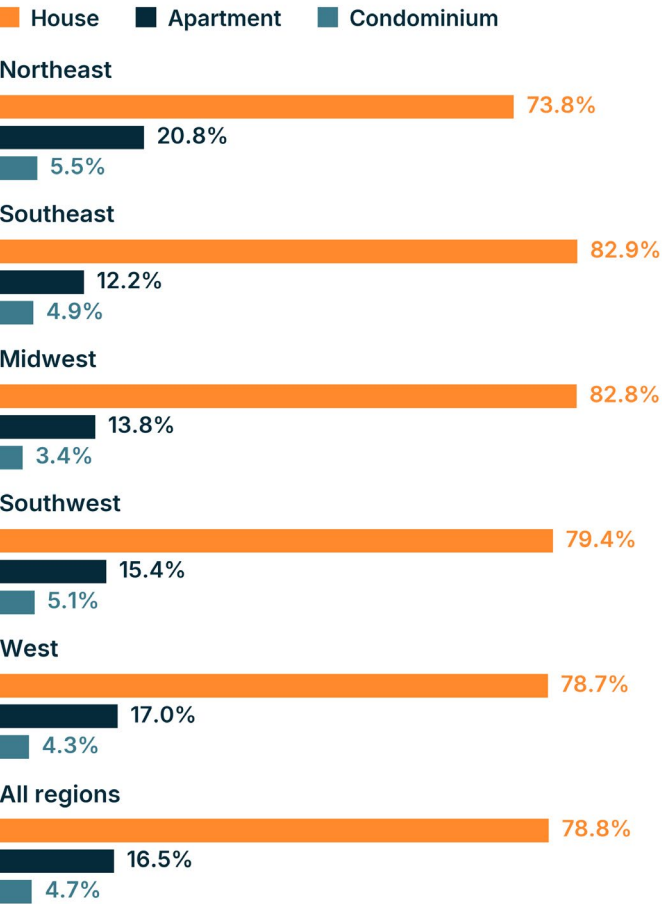
Growth 2015–2019, high-growth counties against all others and the national rate



Derived from Census Bureau population estimates and Bureau of Labor Statistics data Figure 44

Around four in five want a house, not a flat, for their next move

Type of home wanted for next move, by region of residence (n=759)



Source: survey of Latino housing preferences (n=759) Figure 45



Three quarters or more of every group's households live in suburbs and exurbs

Share of households living in suburbs and exurbs, 53 US major metropolitan areas, 2015–19



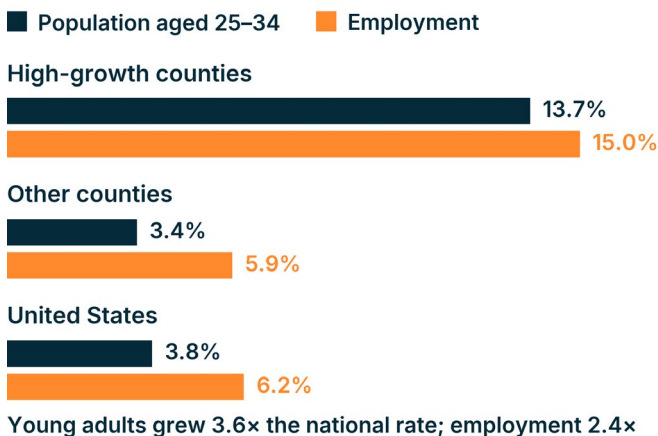
Source: City Sector Model based on American Community Survey 2015–2019. Values measured from the source chart, which carried no data labels

Figure 46

Exurban communities—like Irvine, the Woodlands, and New Albany—represent the epicenter of the economic future. Fast growing counties, home to most planned communities, significantly increased their population of people earning over \$75,000. This cohort is avidly seeking single family homes. The places favored by the foreign born, who comprise 14% of the total population, include the mostly suburban sunbelt metros, such as Miami, Houston, and Dallas-Ft. Worth.

High-growth counties outpaced the nation on both young adults and jobs

Growth 2015–2019, high-growth counties against all others and the national rate



Derived from Census Bureau population estimates and Bureau of Labor Statistics data

Figure 47

Infrastructure for the emerging urban future

These expanding workplaces and work patterns will require expanded infrastructure. The most important commercial and residential infrastructure will continue to be highways, roads, and streets in three patterns: crossroads, cul-de-sacs, and beltways.

Crossroads

Most new hospitals, factories, and warehouses will be built at the crossroads of major highways and other traffic arteries. Factories and warehouses will benefit from access to highways, rail and air freight nodes, and seaports or inland waterways. Shopping centers and entertainment centers are also likely to be located at crossroads locations, although these may decline in importance with factory- or warehouse-to-home delivery.

Cul-de-sacs

The progressive urbanist housing dream of dense, mixed-use, pedestrian villages is as doomed as fantasies about a revival of passenger rail and the end of fossil fuels. Mixed-used zoning, or the abolition of zoning altogether, is unattractive in a country where nine out of ten households have access to a car.

This process could accelerate with the rise of self-driving vehicles that are helpful for servicing an aging population. For their part, developers prefer layouts with cul-de-sacs and long, curving streets to square grid patterns, because the costs of installing infrastructure like sewer and asphalt and the amount of asphalt needed is much less.

Beltways

As the locations of industry, commerce, and housing are decentralized further, many jurisdictions will build new beltways and ring roads around expanded metro areas, as a time-saving alternative to hub-and-spoke road systems with arteries connecting separate suburbs and exurbs with dwindling



central business districts. The new Grand Parkway (state highway 99) is now open for 120 miles in the Houston metropolitan area, with another fifty miles under development. The route will be a near loop, with a less than ten mile gap. A new forty-six mile bypass (the Outer Loop or First Coast Expressway) on the west side of Jacksonville is now open for thirty-three miles and will be completed by 2032.

Progressive urbanists lament the replacement of older grids of streets, but the pattern changed because of consumer demand, not some secret conspiracy of oil or automobile companies. According to one survey, 78% of recent and prospective home buyers would prefer “a home on a cul-de-sac or other street design with limited traffic flow.” Another survey found that home buyers are willing to pay up to 20% more to buy a house on a cul-de-sac.

The energy imperative

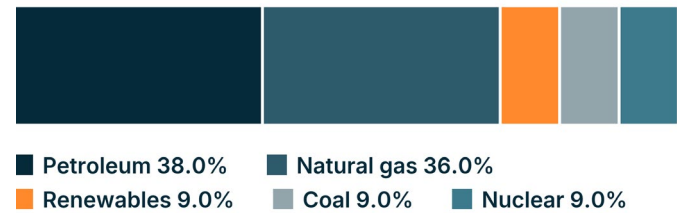
Building the new America will also require energy, which is the basis of modern industrial civilization and infrastructure. A “green transition” from primarily fossil-fuel powered economies to economies powered primarily by “clean” renewable energy sources like solar, wind, hydropower, and biomass, is not going to happen in this century, if ever. Despite both wind and solar power’s growth, we are far from the end of our fossil fuel reliance. In most major economies, fossil fuels account for somewhere between 70% and 87% of all energy use. This is true not only of the United States but China, Germany, Japan, and India.

In 2024, 82% of U.S. energy came from fossil fuels, including petroleum (38%), natural gas (36%), and coal (8%). Nuclear energy provided 9%, which is around the same percentage as all renewable energy combined. And 58% of renewable energy came from burning biomass like ethanol and wood, with wind and solar and hydro power each accounting for only a negligible

amount. The global pattern is similar: fossil fuels account for 82% of global energy in 2023.

Fossil fuels still supply 83% of US primary energy

US primary energy consumption by source, 2023. Total 93.59 quadrillion British thermal units



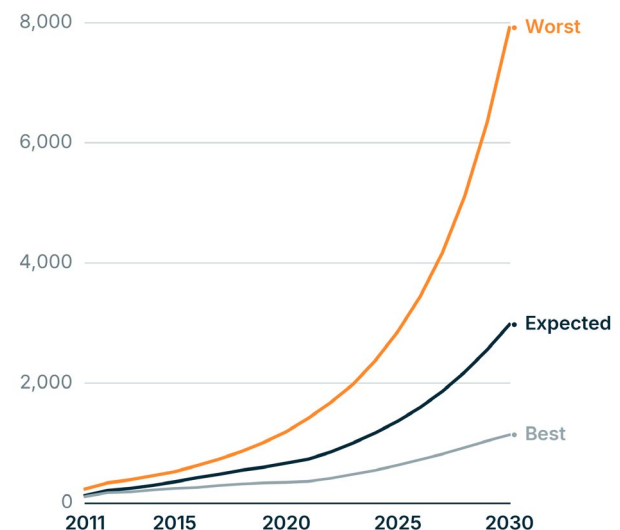
Source: US Energy Information Administration, Monthly Energy Review, April 2024.

Figure 48

Future energy demand is expected to surge, both here and globally. Energy-intensive data centers, part of the AI revolution, are likely to massively increase the demand for cheap and reliable electricity in the next few years.

Data center electricity use could grow sevenfold by 2030 on the worst case

Global data center electricity consumption, terawatt hours



2030 range: 1,137 TWh best case to 7,933 TWh worst

Figure 49

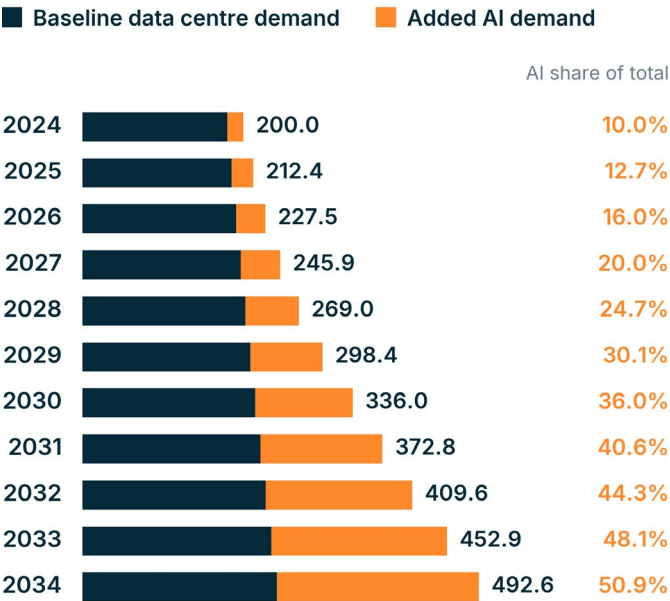
Natural gas and nuclear energy are likely to be tomorrow’s primary power source, with intermittent, weather-dependent sources like windmills and solar panels playing a supporting role. But whatever



form it takes, the electrical grid’s build-out is unlikely to resemble renewable-only advocates’ 1970s-vintage fantasy, in which solar panels on rooftops and electric car batteries contribute electricity to urban grids connected by great numbers of cross-country high-voltage power lines that cut through farms and rural communities.

AI will account for over half of US data centre power by 2034

US data centre electricity demand, terawatt hours



Total demand rises 2.5× by 2034; AI demand rises 12.5×

Source: projection of US data centre electricity demand through 2034 Figure 50

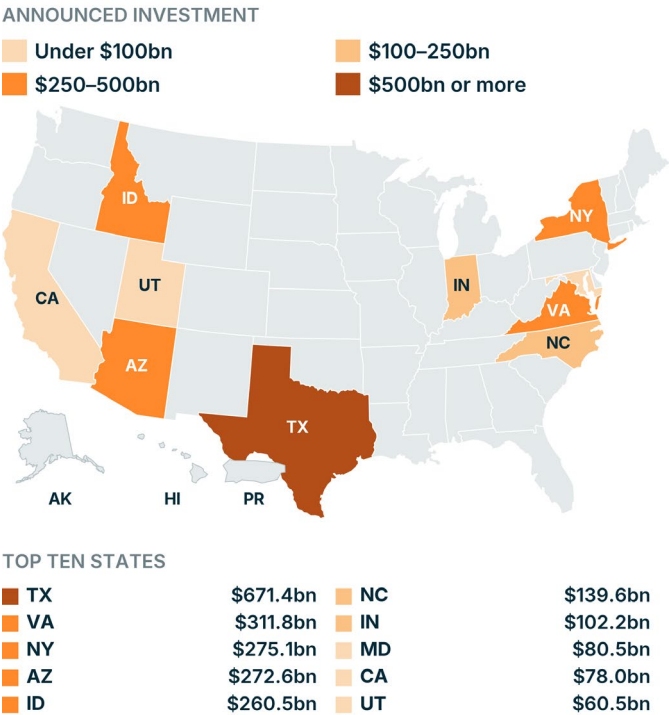
Projection based on a composite analysis of 2024 data center load forecasts by the Electric Power Research Institute (EPRI), Goldman Sachs Global Investment Research, and the International Energy Agency (IEA), extrapolated through 2034.

Notwithstanding the improvements AI and other digital technologies will develop over the next several years, tomorrow’s energy infrastructure is likely to be an evolutionary development of today’s pattern: natural gas pipelines and electric grids. The varied electricity costs in places that emphasize reliable renewables over more conventional forms prove the case for a nuclear and gas

strategy. Today’s highest electricity costs are in “green” places like Germany, Denmark, the U.K., and California. The lowest costs, in contrast, are in U.S. states that rely on fossil fuels, hydro, and nuclear.

Ten states hold the published manufacturing investment total

Announced manufacturing investment since 2025, projects of \$50m and above. Grey states are outside the published top ten



Source: IndustrialSage US Manufacturing Investment Tracker, 24 August 2026 (CC BY 4.0). Only the top ten states are published. Multi-state projects are counted in full against every state named, so these totals overlap Figure 51

Reordering government to create opportunity

Reforming housing and infrastructure requires a government that is responsive and closer to the average voter. This means reversing the centralization trend that has emerged over the past few decades. Herbert Croly’s 1909 book, *The Promise of American Life*, helped define progressivism beyond the old Jacksonian and populist ideas; Progressivism, he argued, had fundamentally reshaped American life, not by the Constitution’s monarchism but by the



disinterested ministering of poet-leaders, experts, and social scientists.

The New Deal embraced this idea, and the needs of the time perhaps made that embrace necessary. Contemporary critics however, many of them agrarians, rightly perceived that the culture of big business, big government, and big labor, all presided over by cognitive elites, would prove intrusive. The federal government performs certain necessary functions, like controlling the border, national defense, and interstate commerce, but localities are more responsive and efficient for others, such as education, law enforcement, and roadbuilding.

States should follow progressive Justice Louis Brandeis's advice and "serve as a laboratory" of democracy rather than as supplicants to the imperial center in Washington. President Bill Clinton later adopted this approach and praised both liberal and conservative governors' pragmatic responses to key social and economic issues. Such state-level responses, he correctly noted, were critical in a country as complex and diverse as ours.

One method of promoting decentralization of decision-making to the state and local levels could be a return to President Richard Nixon's plan for federal revenue sharing. The basic principle was to push decision making and federal funding down to the local level. A combination of deficit hawks and progressive N.G.O. authoritarians who wanted to micromanage all federal aid to states and cities destroyed Nixon's proposal.

Local Government Size and Efficiency

Extensive research, including reports from Pennsylvania, New York, Ohio and Illinois, shows that smaller, local, general-purpose governments (cities, towns, and townships) tend to spend less money, tax their residents at a lower rate, and borrow less money per capita than larger governments. In Pennsylvania, for example, local general

government expenditures per capita are highest by far in the two largest cities, Philadelphia and Pittsburgh. Only 16% of Pennsylvania's population combined live in those cities, but they account for 31% of all the state's municipal spending.

Research finds a positive relationship between government size, population, and expenditures per capita. Larger jurisdictions spend more money and there is a similar relationship between government size and long-term debt per capita. Proposals to merge or abolish smaller governments rest on a "bigger-is-better" assumption. Historically, the opposite has occurred: merging governments increases costs. In a larger jurisdiction, each voter's influence shrinks, while well-organized and well-financed interest groups, which typically lobby for increased spending, gain a more advantageous arena. Local democracy's check on that pressure is often overlooked in the merger discussion.

Re-imaging democracy from the grassroots

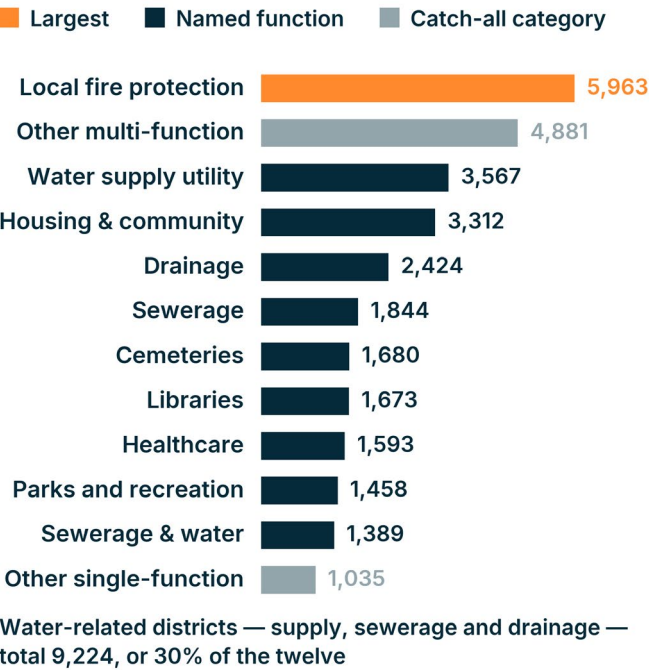
Simply shifting responsibility to the states is not sufficient, because they too can prove inefficient, anti-local, and anti-democratic. Important infrastructure like major roads and utility grids should be large county or regional agencies' responsibility. Many of the U.S.'s greatest infrastructure achievements, like the Golden Gate Bridge, were commissioned locally, through a public special district that hired private firms, and were completed ahead of schedule and under budget.

In 2022, there was a record high of such districts—39,262—that covered a wide range of functions. Some serve multiple purposes, but most tend to specialize in providing a particular utility or service such as fire and emergency services, water and sewage supply, drainage, libraries, and parks and recreation. There could also be special districts to promote space-related industries, mostly well out on the periphery.



Fire protection is the single most common type of special district

Number of US special districts by function, twelve most common types



Derived from Census of Governments Figure 52

Local general-purpose governments have increasingly been transferring their former functions to special purpose districts. This raises the question: what purpose do cities and counties serve in the twenty-first century? In much of the United States, the distance a horse could travel in a day determined county size. That distance, around thirty miles, ensured that rural residents could reach the county seat on horseback or by carriage easily. This makes the average U.S. county around 1000 square miles.

In some cases, governments may well consider having special districts to handle discrete functions like energy, water, and roads. But in many cases huge conurbations like New York City’s population of eight and a half million is around fourteen times larger than the population of Wyoming, the least populous state in the Union, which has fewer than 600,000 inhabitants. Its population is comparable to that of the entire nation of

Switzerland and larger than the populations of Laos, Denmark, and Ireland.

In 1898, New York City was formed by consolidating the formerly independent entities of Manhattan, Brooklyn, Queens, the Bronx, and Staten Island. Progressives in the 1900s believed that metropolitan consolidation would lead to efficient and nonpartisan government, but that hope largely proved to be a mirage.

Downsizing the scale of governance fits with population dispersion and fosters smaller, more efficient, and more responsive government. In his 1967 presidential address to the American Political Science Association, the eminent political scientist Robert Dahl proposed the division of metro areas into federations of self-governing areas with 50,000 to 200,000 residents, which would be small enough for meaningful civic participation yet still large enough to enjoy economies of scale.

There have been movements in Los Angeles and other large cities to secede and become independent municipalities. Concurrently, many smaller cities with similar demographics have proven far more capable of producing public goods like nice parks, paved streets, and better law enforcement.

As the ongoing decentralization of production, work, and housing increases, we can envision a future in which webs of specialized districts and smaller, more cohesive units of government prove more responsive to individuals and businesses’ spontaneous choices.

People also prefer governments to be closer to them. A 2023 poll found far higher levels of trust for state and particularly local governments as opposed to the federal level. This seems particularly marked among younger people. “Millennials are on a completely different page than most politicians in Washington, D.C.,” notes pollster [John Della Volpe](#), “This is a more cynical generation when it comes to political institutions.”



The decades-long rush to centralize power, people and economics have become an invitation to interminable conflict. This is true on both the national and state level. There is little point in trying to force common ground between Portland and the small towns in conservative eastern Oregon, or harmonizing California and Mississippi. We need to maintain certain basic standards, largely to protect individual and property rights, but decentralization offers the promise of more democratic and responsive governance.

In future decades, we could do well to erect more localized and specialized structures that are more congruent with local sentiments and needs. This is a traditional American strength. Alexis de Tocqueville observed that only through civic association are “the habits of self-government” acquired. Democratic citizenship is most keenly felt in local venues, and it is there where we can most successfully build an American future aligned with our Founders’ ideals.



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