



Development Trends Along Transit

Regional growth near high frequency
transit in the Twin Cities

2020 Report

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Executive Summary

The Twin Cities continue to grow. According to the Metropolitan Council 2019 Regional Forecast, the region gained 313,000 new residents between 2011 and 2020 and it is expected to gain another 485,000 residents by 2040. Where these residents choose to live and work will have a meaningful impact on the region. Infill development along high frequency transit can use existing infrastructure, maximizing community investments and supporting walkable, sustainable communities. Strategic development along existing and planned high frequency transit corridors can help ensure the Twin Cities don't just grow – they thrive.

Metro Transit's high frequency network is the backbone of transit service in the Twin Cities region. It provides frequent and reliable service that can satisfy travel needs throughout the day on weekdays and weekends. By estimating the total amount of development that has occurred along high frequency transit corridors between 2003 and 2019, and considering the potential for future development, this report provides insight into how the region's transit corridors support transit oriented development (TOD), and to gauge the value that developers and residents place on transit.

Using data from the Metropolitan Council's Annual Building Permit Survey, this report explores trends in multifamily residential development since 2009, as well as commercial, public and institutional, and industrial development since 2003. Just under \$14 billion in development has been permitted near high frequency transit in the last 17 years.¹ This includes projects that have been completed since being permitted, and ongoing projects. Of that \$14 billion,

\$9.2 billion is located within one half-mile of a light rail transit (LRT) station, \$4.1 billion is located within a half-mile of a bus rapid transit (BRT) station, and \$3.6 billion is served by high frequency local bus routes outside areas with direct LRT or BRT service. All told, the permitted value of development within transit corridors represents 35.5% of the development that has been permitted for the region as a whole, on just 3% of the region's land area.

The Metropolitan Council monitors news media and other sources to build an index of planned development for the region – these data can be used to estimate future development, though not all planned developments will be completed. The region's planned developments show the potential for an additional 35,000 multifamily units along high frequency transit, and another \$8.9 billion in development value near high frequency transit. Sixty-two percent of the planned development for the region is mixed use (commercial and residential uses in the same development) and 76% of that mixed use development is planned near high frequency transit.

These data do not show that good transit causes the growing percentage of development occurring along high frequency transit corridors. The trends revealed by this report do suggest that development near high frequency transit has been highly successful, with more development being located near high frequency transit every year.

Although produced in 2020, this report only includes data up to 2019 and thus does not address the impact of the COVID-19 pandemic on regional development.

¹ Permit Value does not include land value, which is often included in estimates of development value.

PERMITTED Development Highlights:

- \$13.8 billion in development has been permitted along high frequency transit. This represents 35.5% of regional development.
 - \$9.2 billion near LRT stations
 - \$4.1 billion near BRT stations
 - \$3.6 billion near high frequency local bus
- 34,200 multifamily units have been permitted near high frequency transit. This represents 40% of multifamily units in the region.
 - 20,500 units near LRT stations
 - 7,800 units near BRT stations
 - 13,300 units near high frequency local bus
- 35.5% of regional development has occurred along high frequency transit.
 - 43% multifamily development
 - 39% commercial development
 - 29% public and institutional development
 - 7% industrial development

PLANNED Development Highlights:

- \$8.9 billion in development is planned along high frequency transit. This represents 68% of the development planned in the region.
 - \$5.6 billion near LRT stations
 - \$4.9 billion near BRT stations
- 35,000 multifamily units along high frequency transit. This represents 43% of the units planned in the region.
 - 19,000 multifamily units near LRT stations
 - 17,000 multifamily units near BRT stations
 - 60% of multifamily units as part of a mixed-use development
- Nearly 62% of planned development in the region is mixed use.
 - 76% near high frequency transit
 - Roughly 70% of commercial, residential and public and institutional development near high frequency transit

Scope of Report

Transitways

This report focuses on development that has been planned or permitted within areas served by high frequency transit in the Twin Cities metropolitan region. High frequency transit includes not only the frequency Light Rail Transit (LRT) and Bus Rapid Transit (BRT) transitways, which make up the METRO network, but also certain local bus routes which operate every 15 minutes or less.² Including high frequency local bus routes allows this report to more fully explore the regional transit system as a network.

High Frequency Transit: The Metro Transit high frequency network consists of local bus, Bus Rapid Transit and light rail lines that operate every 15 minutes or less on weekdays between 6 a.m. and 7 p.m., as well as on Saturdays between 9 a.m. and 6 p.m. A map of the Metro Transit High Frequency Network is in Appendix A.³

Development Along Transit

For the purposes of this report, any development that occurs within a half-mile of a transitway station (LRT or BRT) or within one-quarter mile of a high frequency local bus route is considered to be along transit.

Development along transit is evaluated at three different scales: region-wide, system-type and route. The region-wide scale looks at development that has occurred anywhere in the entire high frequency transit system. No development permit is counted more than once at the region-wide scale. The system-type scale looks at

development that has occurred near any LRT station, any BRT station or any high frequency local bus route. If a development is located near an LRT station and a BRT station, it is attributed to both transitways. However, development is only attributed to the high frequency local bus route if it is not otherwise served by LRT or BRT. The route level analysis looks at development that has occurred along each transitway individually. If a development occurs near more than one transitway, it is included in the development totals for both transitways.

Types of Development

This report looks at four categories of development: multifamily residential, commercial, public and institutional, and industrial. The section on planned development also includes a mixed-use category, which includes some combination of these four development types. However, 99% of mixed-use development is a combination of commercial and residential uses.

Multifamily Residential: Residential developments that consist of two or more units in one building. This includes accessory dwelling units (ADUs), townhomes, duplexes, triplexes, fourplexes, any development with five or more units, and any conversion which results in an increased number of units. Remodels of an existing residential development are excluded.

Commercial: A broad category of development that includes office, retail, restaurant, hotel and other business

developments. The dollar value associated with converting or remodeling existing commercial space is counted in this study.

Public and Institutional: Land uses that do not fit into the commercial, industrial or residential categories. These generally consist of government buildings, hospitals, parks and public recreation facilities, religious buildings, and educational facilities. Transportation projects such as roads and transit facilities are excluded from this study, as are utilities and other public works projects. Finally, development associated with MSP International Airport is excluded due to the substantively different nature of such developments.

Industrial: Industrial developments include those engaged in production, processing, assembly, manufacturing, distribution and other such handling of goods and materials. These uses may create disturbances for nearby developments, but also tend to generate jobs.

2 All LRT and BRT lines included in this report are part of the METRO network, however the METRO brand name will not be used within the text of the report in order to support legibility.
3 Northstar and Red Line do not meet the threshold for high frequency transit. As commuter rail and highway BRT respectively, these lines operate with headways exceeding 15 minutes.

Time Frame

This report includes data beginning in 2003 for commercial, public/institutional, and industrial development, and beginning in 2009 for multifamily residential development. As in past years, developments are assigned to a transitway only when permitted or planned after a certain point in the transitway planning process. In order for a development to be counted along a high frequency transitway, the building permit for that development must be issued after a transitway has reached the following point in the planning process:

- A New Starts project enters project development
- A Small Starts project enters project development
- An arterial BRT project has a Council-approved station plan

The planning of the existing high frequency local bus routes precedes available development data so no cutoff date is applied to these routes. The high frequency transit routes included in this study and the timeframe applied to each route is shown below. Given limitations of the data provided, the timeframe is applied by year.

Where a development is served by a transitway as well as by high frequency bus, the development has been attributed only to the transitway.

In August 2020, the Metropolitan Council and Hennepin County announced that the alignment of the METRO Blue Line Extension would no longer be using approximately eight miles of freight railroad property, as initially planned. The project is currently advancing with the identification of a community supported alternative route. Given that the permitted and planned developments included in this report (up to 2019) would have been assuming the previously approved route for the Blue Line Extension, no change has been made to the analysis of that transitway for this update.

As a final note, in some cases high frequency transitways are built in areas that were previously only served by high frequency local bus. In these cases, any development in the area prior to the year of inclusion for the transitway has been included in the high frequency local bus category. Any development in the area after the date of inclusion for the transitway has been counted towards the transitway.

| 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|--------------------------|------|------|------------------|------|------|------|------|------|-----------------------|------|--------------|-------------|----------------------|--------------|--------------|-----------------|
| High Frequency Local Bus | | | | | | | | | | | | | | | | |
| METRO Blue Line | | | | | | | | | | | | | | | | |
| | | | METRO Green Line | | | | | | | | | | | | | |
| | | | | | | | | | METRO Green Line Ext. | | | | | | | |
| | | | | | | | | | | | METRO A Line | | | | | |
| | | | | | | | | | | | | Orange Line | | | | |
| | | | | | | | | | | | | | METRO Blue Line Ext. | | | |
| | | | | | | | | | | | | | | METRO C Line | | |
| | | | | | | | | | | | | | | | METRO D Line | |
| | | | | | | | | | | | | | | | | METRO Gold Line |

Sources and Statistics

The permit data represented in this report are drawn from the Metropolitan Council’s Annual Building Permit Survey. These data are provided to the Metropolitan Council by the region’s municipalities. Data that was not provided by municipalities will not be reflected in this report. It is important to note that permitted value is not equivalent to development value. Among other differences, permit value excludes land value. Actual development value in the region will exceed the cumulative permit values provided in this report.

Data on planned developments have been drawn from the Council’s Development Tracker. This database draws its information primarily from news media and thus does not have the same level of accuracy as the building permit data. The Development Tracker is periodically checked against the data collected through the Annual Building Permit Survey to ensure that no developments are double counted. Not all planned developments will be completed, and some planned developments may not be captured by the media. Further, not all developments advertise the value or size of a planned development. Nevertheless, keeping track of planned development

does provide a glimpse of what may be built along high frequency transit in coming years. Any analysis of total planned development includes only those developments where a development value or number of planned units has been provided. The maps of planned development

include all developments for which an address has been identified. Unlike the values recorded in the permit data, the values provided for planned development are an estimate of total development value.

Regional Development Trends

The Twin Cities metropolitan region has seen nearly \$39 billion in permitted development value since 2003, with more than \$15 billion in permit value for commercial developments alone. Over the same period, nearly \$14 billion has been permitted near high frequency transit, representing 35.5% of the region’s development value on just 3% of the region’s land. Development for the region as a whole has been increasing, although the 2008 recession interrupted that positive trend to some degree. Development permit values near high frequency transit hit a low point in 2010 – since 2010, development near transit has expanded for all development types. In 2019, permits worth \$1.8 billion were issued for developments near transit (36.5% of regional development). Within transit corridors, 67% of the permitted value for developments is occurring near LRT stations, including nearly 20,500 multifamily residential units. Throughout the region, investment in development has been increasing since 2003 – the permit data suggest that the overall share of development occurring near high frequency transit has also been increasing.

PERMITTED Development Highlights:

- **\$13.8 billion** in development has been permitted along high frequency transit. This represents 35.5% of regional development.
 - \$9.2 billion near LRT stations
 - \$4.1 billion near BRT stations
 - \$3.6 billion near high frequency local bus
- **34,200 multifamily units** have been permitted near high frequency transit. This represents 40% of multifamily units in the region.
 - 20,500 units near LRT stations
 - 7,800 units near BRT stations
 - 13,300 units near high frequency local bus
- **35.5% of regional development** has occurred along high frequency transit.
 - 43% multifamily development
 - 39% commercial development
 - 29% public and institutional development
 - 7% industrial development



Multifamily Residential

Permits were issued for \$1.2 billion in multifamily development along high frequency transit in 2019. This represents a 34% increase in permit value from 2018 and the largest volume of development by permit value since 2009, which was the first year these data were collected. The developments permitted in 2019 alone will contribute 6,500 new housing units to the region. In particular, the number of units near BRT stations in 2019 increased by 78% to just under 3,000 permitted units. The high number of units near BRT stations continues a trend from 2018, when units near BRT nearly doubled. Only high frequency local bus routes saw a reduction in the number of units being permitted nearby in 2019 (1,660 units compared to 1,730 in 2018).

Since 2009 more than 34,000 multifamily units and \$5.4 billion in permit value has been located near high frequency transit. This represents 43% of the multifamily development that has occurred in the region over that time. In other words, more than 40% of multifamily development has occurred on just the 3% of regional acreage served by high frequency transit.

Ninety-nine percent of residential developments occurring near high frequency transit are multifamily developments with five or more units (MF5), as distinguished from the other multifamily housing types considered in this report. MF5 developments near transit represent \$5.4 billion in permit value between 2009 and 2019, with townhomes carrying the next highest total permit value at over \$25 million. While most MF5 developments near transit are along LRT lines (61%), the majority of townhomes, duplexes, triplexes, and quads and ADUs are located near high frequency local bus routes.

2012 saw an unusually high percentage of residential development occurring along high frequency transit, with 59% of the units and 62% of the value for the region in that year, as shown in Table 1. Both the Green Line (\$200,800,000) and the Blue Line (\$210,650,000) had total permit values exceeding \$200 million in 2012, while high frequency local bus saw over \$250 million in residential development permit value.



Table 1: High Frequency Transit Share of Regional Residential Development

| Year | Units | Permit Value | % of Region Units | % of Region Permit Value |
|--------------|---------------|------------------------|-------------------|--------------------------|
| 2009 | 544 | \$62,421,676 | 25.1% | 27.7% |
| 2010 | 950 | \$93,362,624 | 29.0% | 28.0% |
| 2011 | 1,398 | \$123,580,901 | 34.5% | 38.5% |
| 2012 | 4,618 | \$511,893,249 | 59.0% | 62.0% |
| 2013 | 3,616 | \$608,217,713 | 45.9% | 50.2% |
| 2014 | 1,962 | \$277,538,961 | 30.6% | 32.5% |
| 2015 | 3,300 | \$566,979,633 | 42.0% | 46.0% |
| 2016 | 3,375 | \$587,405,883 | 37.3% | 41.9% |
| 2017 | 3,801 | \$573,663,158 | 37.5% | 40.9% |
| 2018 | 4,386 | \$863,685,057 | 37.7% | 41.8% |
| 2019 | 6,539 | \$1,148,997,406 | 43.9% | 43.3% |
| Total | 34,174 | \$5,410,646,137 | 40.3% | 43% |

Chart 2: Permitted Multifamily near High Frequency Transit by Units over Time

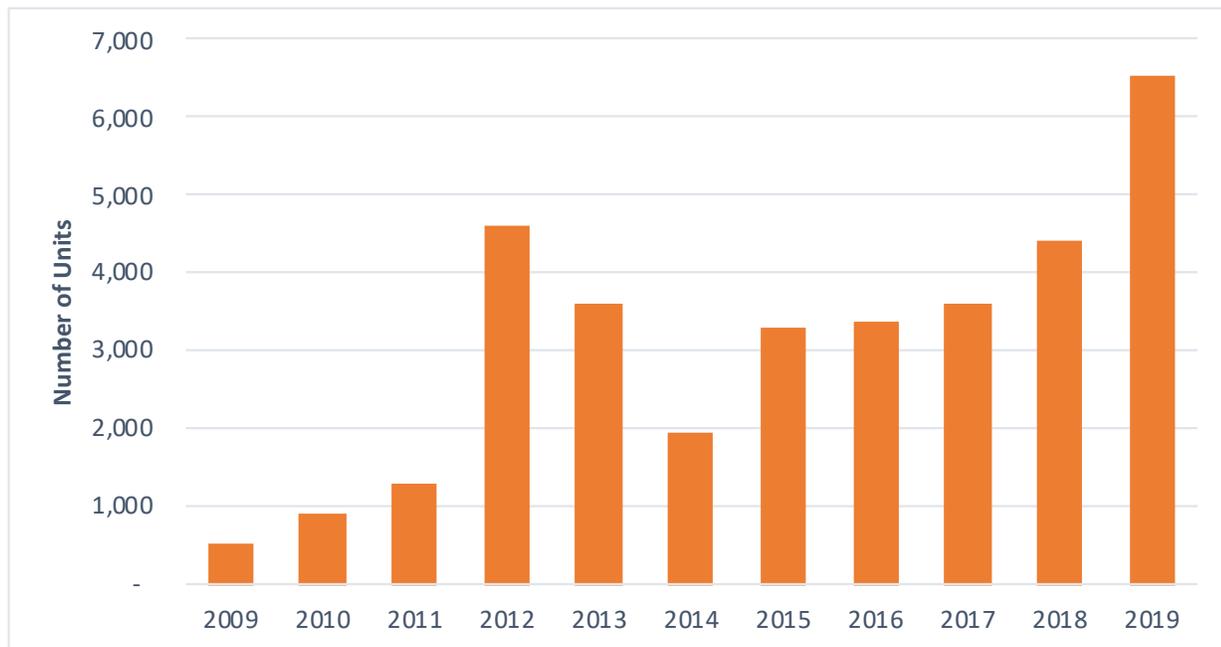


Chart 3: Permitted Multifamily near High Frequency Transit by Permit Value yearly total

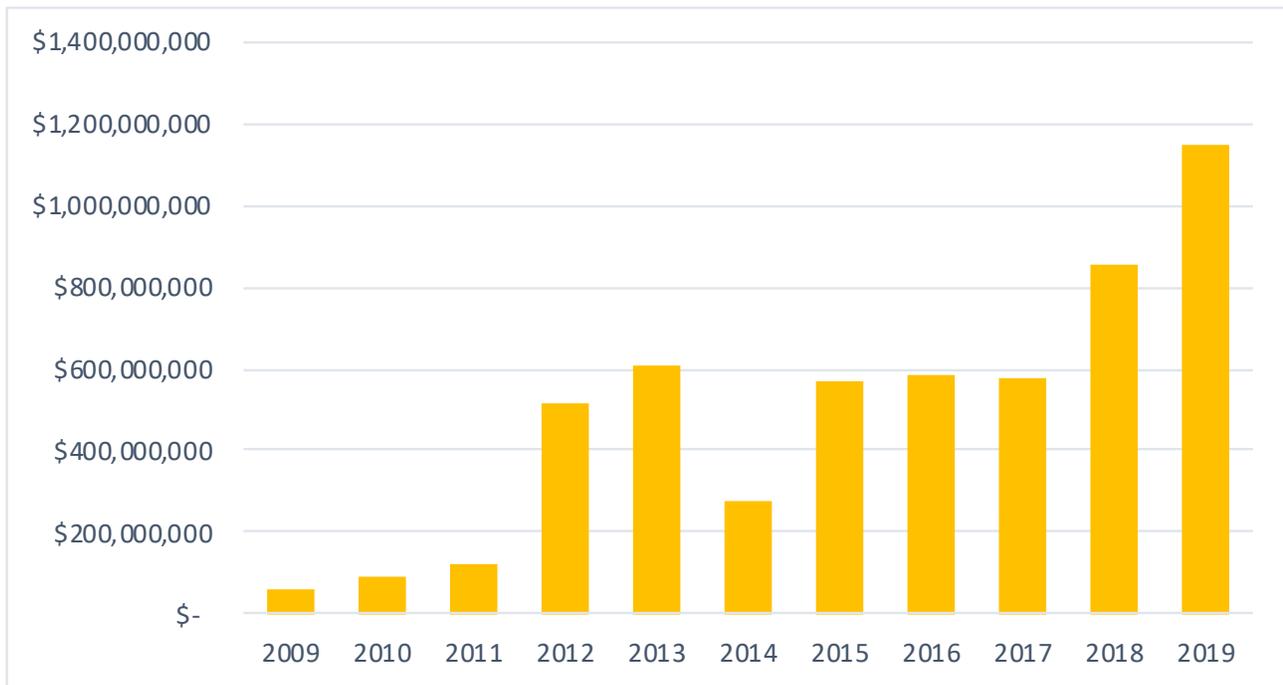
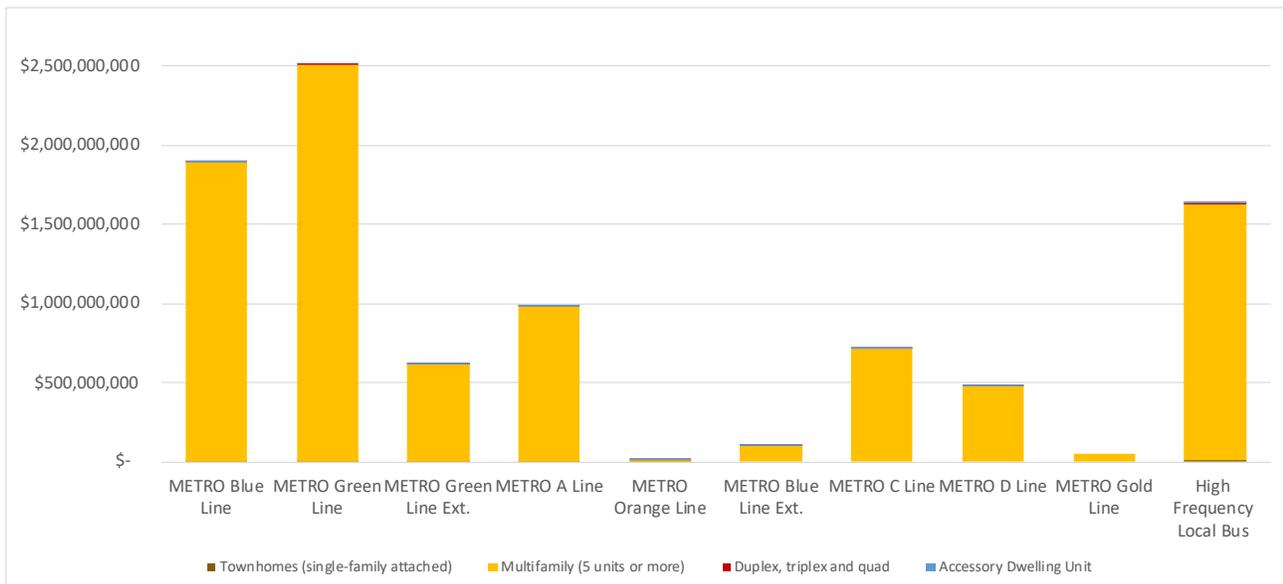
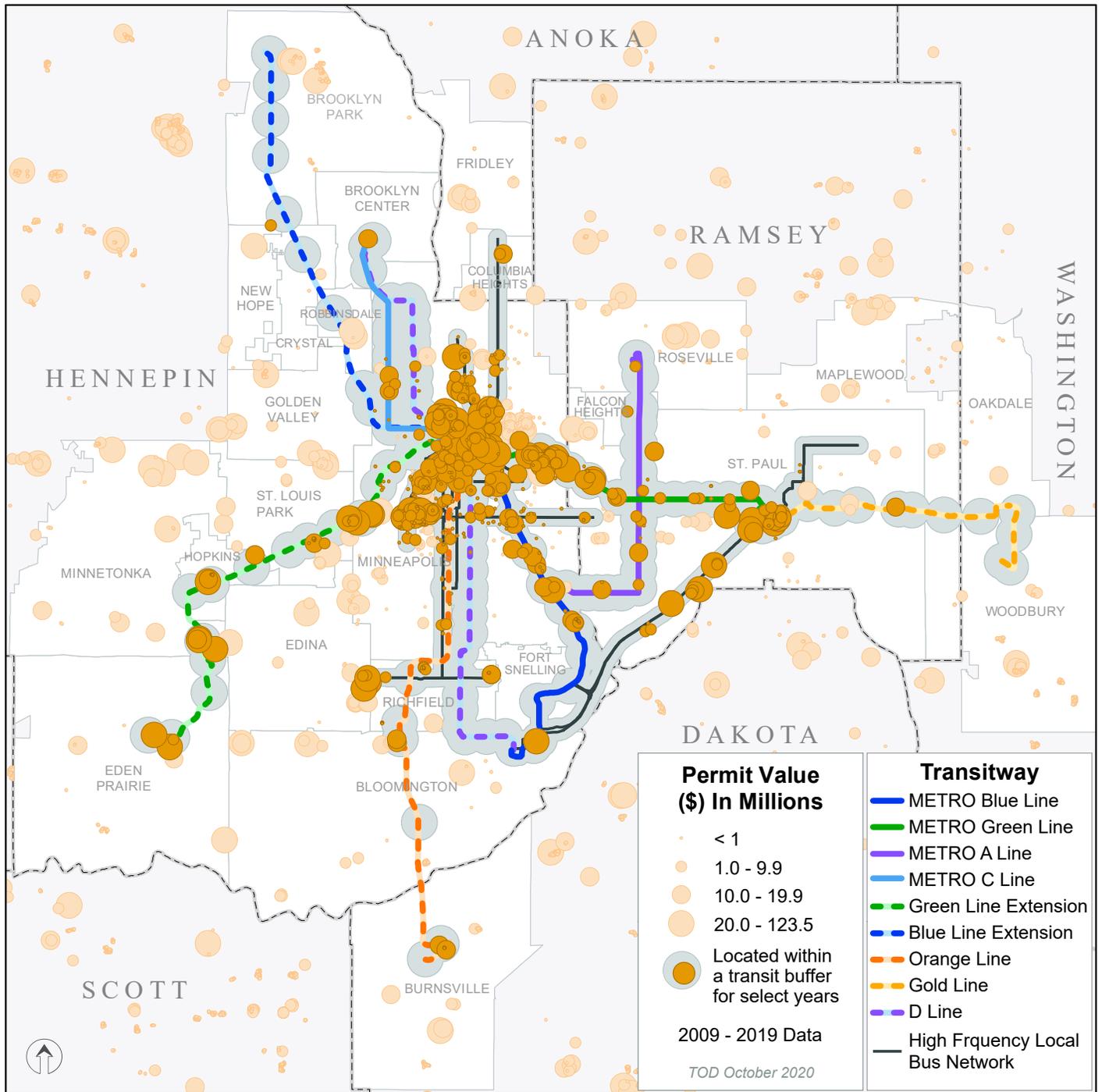


Chart 4: Permitted Multifamily Units near High Frequency Transit by Type and Transit Route⁴



4 Due to the nature of the data, permits are reported for each relevant line – value may be double-counted and should be used only to indicate share by line.

Map 1: Multifamily Residential Development near High Frequency Transit



Map 1 shows the expected concentration of residential developments near urban cores. However, noticeable clusters of multifamily developments also occur along the Green Line between Minneapolis and St. Paul, along the Blue Line through south Minneapolis, and along other high frequency transitways.

Commercial

2019 saw a reduction in permit value for commercial developments near high frequency transitways at just under \$422 million, compared to over \$624 million in 2018, which was also down from the 2017 high of nearly \$800 million. Commercial development near high frequency transit still represented 37% of the permit value for the region. A drop in commercial development near both the A Line and the Gold Line might have contributed to 2019's lower number, while the Blue Line Extension saw zero new permits.

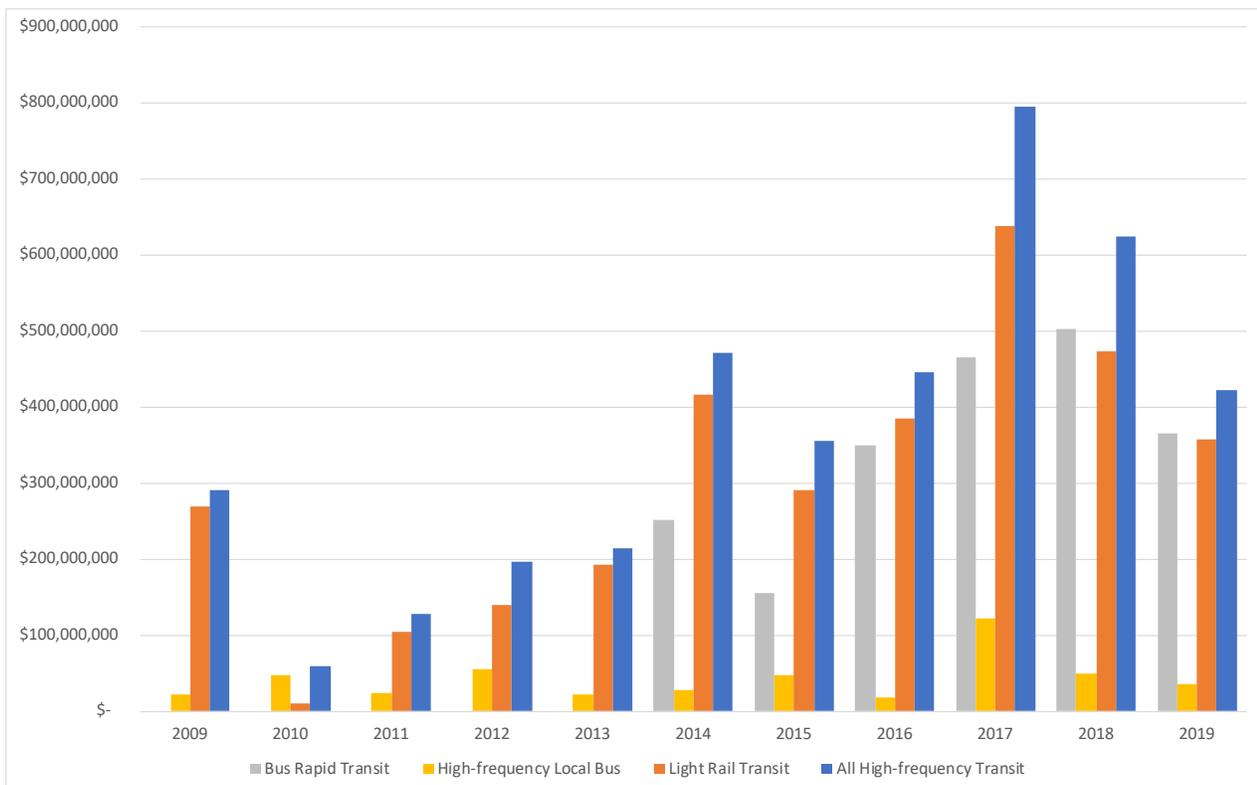
Over \$5.9 billion in commercial development has occurred within areas served by high frequency transit since 2003, a total which represents 41% of the region's total permit value for commercial development. Just under 30% of the region's commercial development by permit value has occurred near LRT lines, with more than \$2.6 billion each in permit value attributed to the Blue Line and the Green Line. The Orange Line has seen \$1.5 billion in development since the tracking began in 2014, while the C Line has seen \$1.2 billion in permit value since 2016. Thus, although commercial development in the region generally has fallen since a peak in 2017, the share of commercial development near high frequency transit remains consistently near or above 40%.

As might be expected with commercial development, permits and permit value cluster near established

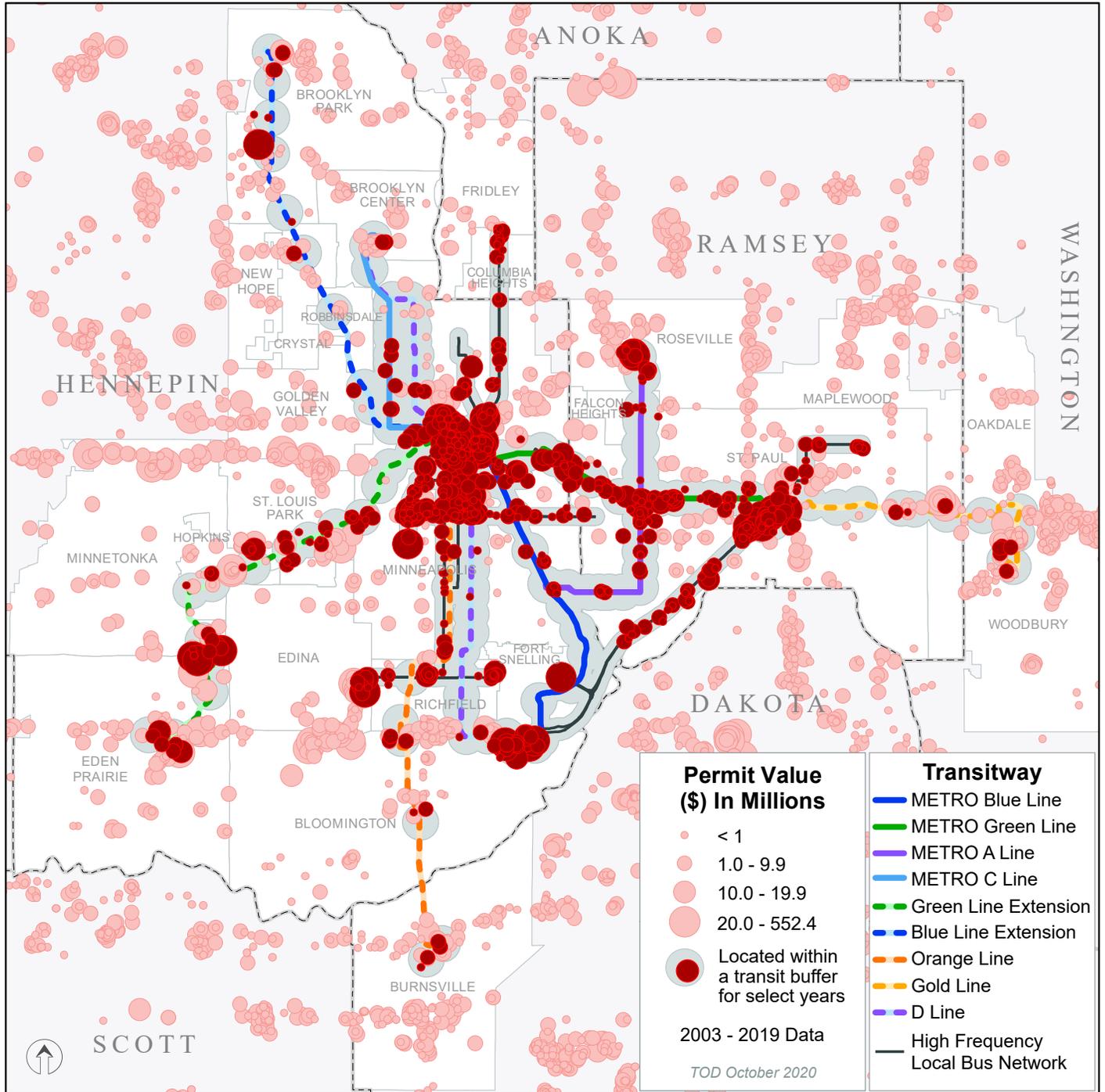
commercial corridors. Areas served by high frequency transit contain 3% of the region's commercial development, with those commercial corridors near high frequency transit containing both the highest concentration of development and the highest permit values. As more high frequency transit lines have been added to the region, the proportion of commercial development occurring within high frequency transit corridors has also grown. Although this report cannot draw concrete conclusions regarding causation, it is possible that the continued success of early developments along lines like the Blue and Green LRT has increased confidence in the tangible benefits offered by siting commercial developments near transit.

The nearly \$800 million construction of U.S. Bank Stadium is removed from Chart 5 below as it turned 2014 into an outlier, though these permits have been included in the regional analysis. Further investments in U.S. Bank Stadium since its initial construction have been included in the following chart, given that these continued investments might indicate the continued value and success of a transit-connected sports stadium. Of particular note is the nearly \$3 million spent on the plaza outside the stadium in 2017, which included investment in pedestrian, bicyclist, and transit-related amenities.

Chart 5: Permitted Commercial Development near High Frequency Transit over Time



Map 2: Commercial Development near High Frequency Transit



Commercial development continues the trend of clusters near established urban cores and along transit corridors, as shown in Map 2. High value development permits can be seen within both downtowns, the Uptown neighborhood, and near Mall of America. Commercial development not yet served by high frequency transit can be seen to follow clear commercial corridors, providing clear possibilities for the expansion of the high frequency transit system.

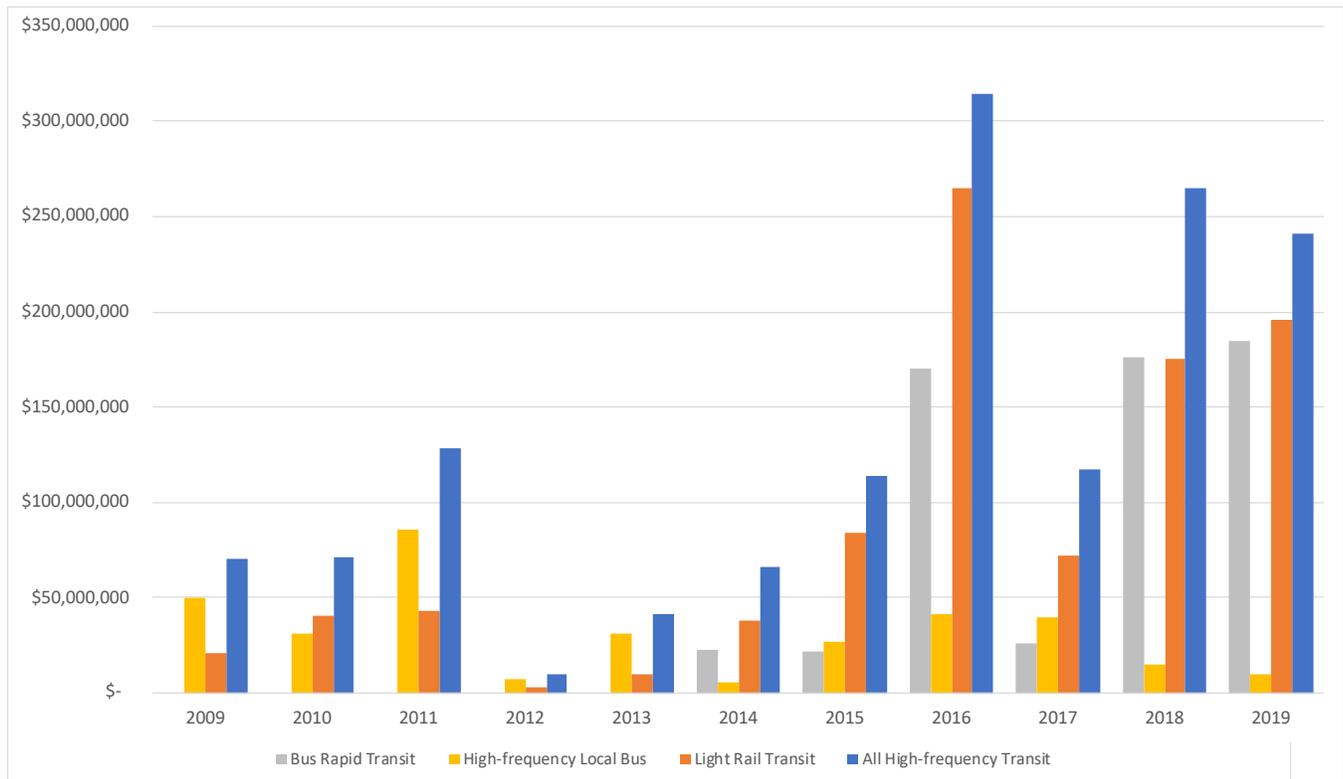
Public and Institutional

Access to public and institutional developments such as government buildings, hospitals, parks, and schools is an important consideration in determining their location. Placing such developments near transit fosters equity by increasing accessibility to the important community services that these land uses provide.

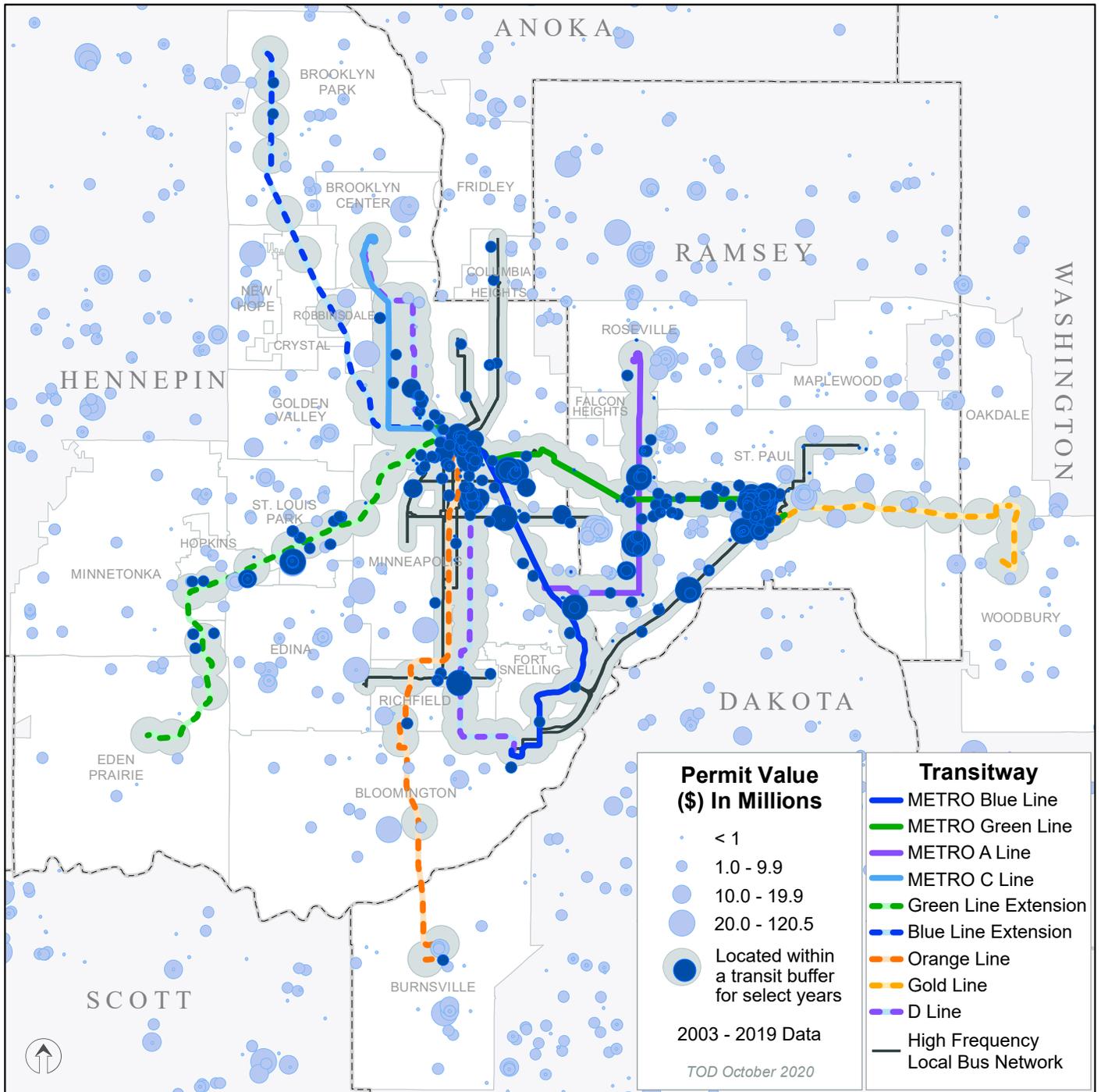
More than 29% of the region’s public and institutional development has occurred near high frequency transit since 2003, with over \$2 billion in permit value. In 2018, public and institutional investments near transit totaled \$264 million, a 123% increase over 2017. That total fell to

\$240 million in 2019, accounting for 28% of the regional public and institutional value. Although it is more difficult to identify any general trends in public and institutional development, it should be noted that the permit value for public and industrial developments near high frequency transit has consistently increased at a higher rate from year to year since 2003 than in the region generally. In addition, in 2016, 2018, and 2019 permit value near transit exceeded \$240 million. 2016 is an outlier with over \$313 million in public and institutional development, due to high value additions at Hennepin County Medical Center, Augsburg University, and a remodel of the Minnesota State Capitol.

Chart 6: Public and Institutional Permit Value near High Frequency Transit by Year



Map 3: Public and Institutional Development near High Frequency Transit



Although there are fewer public and institutional developments than commercial or residential developments generally, Map 3 shows clustering near both established transitways and planned transitways.

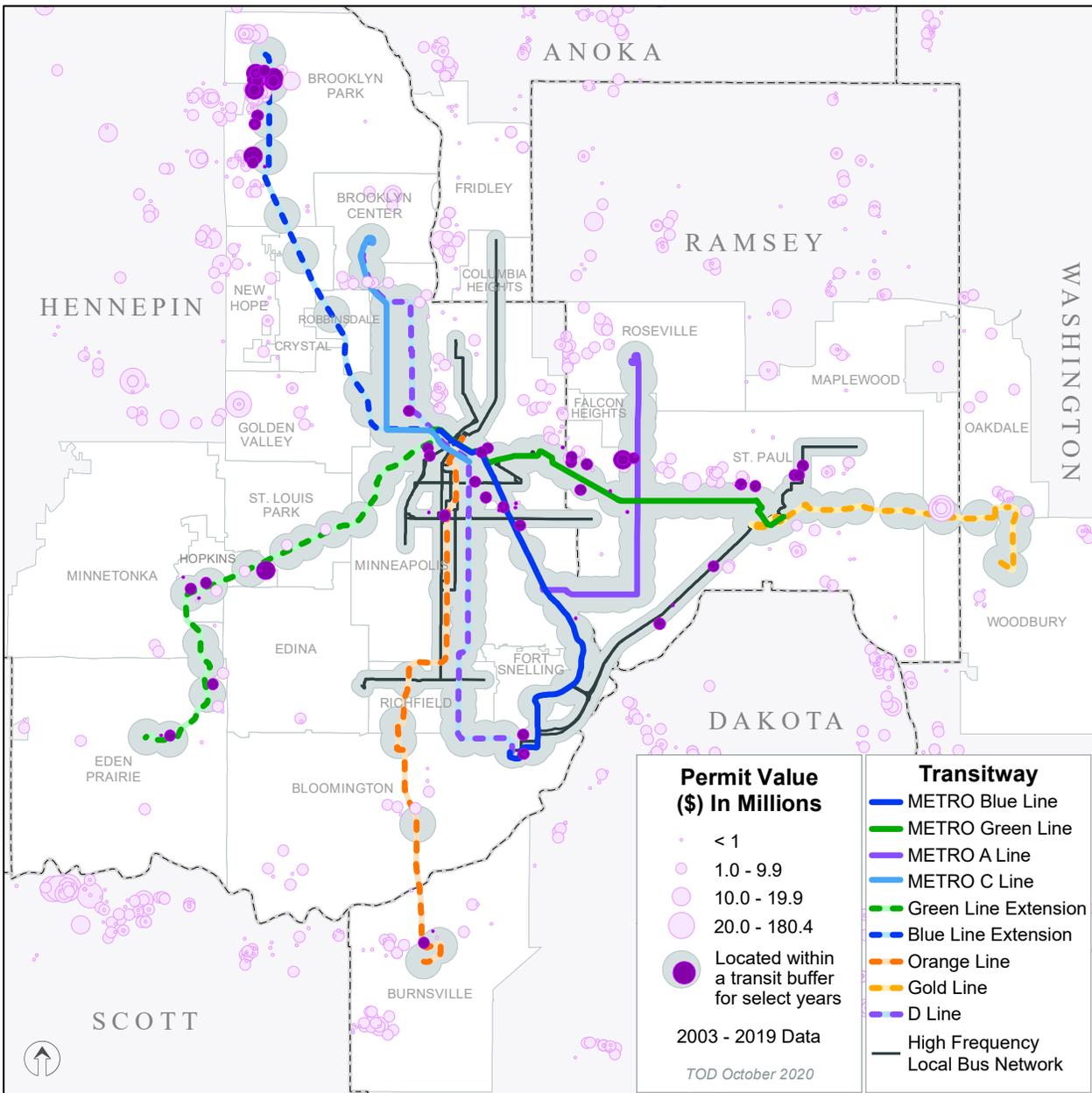
Industrial

In 2019, the share of industrial development near high frequency transit dropped steeply, from 12% to 5%, ending a five-year period of higher development value near high frequency transit lines. From 2014 to 2017, industrial development permits occurred almost exclusively along the Blue Line Extension or the Green Line Extension; during the same period the permit value for industrial developments along high frequency transit has generally increased steadily. Industrial development served by high frequency transit reached its highest share of regional development in 2016 at 16.3% (just under \$50

million). Since 203, 7.1% of industrial development has occurred within the 3% of regional land area near high frequency transit.

It is possible that the addition of the Blue Line Extension and the Green Line Extension will lead to a continued increase in the industrial development value located within transitways. These two LRT extensions pass through areas more suited to industrial land use, allowing transit riders to connect to jobs.

Map 4: Industrial Development near High Frequency Transit



Map 4 shows the high value investments in industrial developments occurring near the Blue Line Extension and the Green Line Extension.

Chart 7: Industrial Permit Value near High Frequency Transit by Transitway⁵

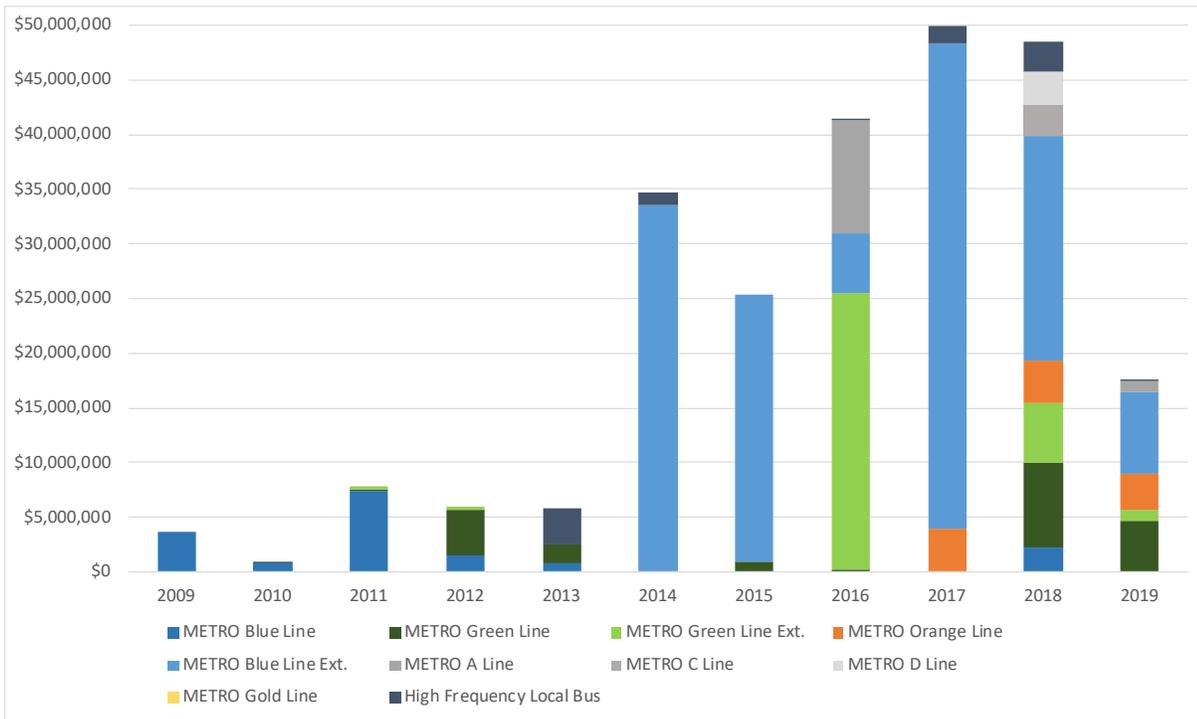
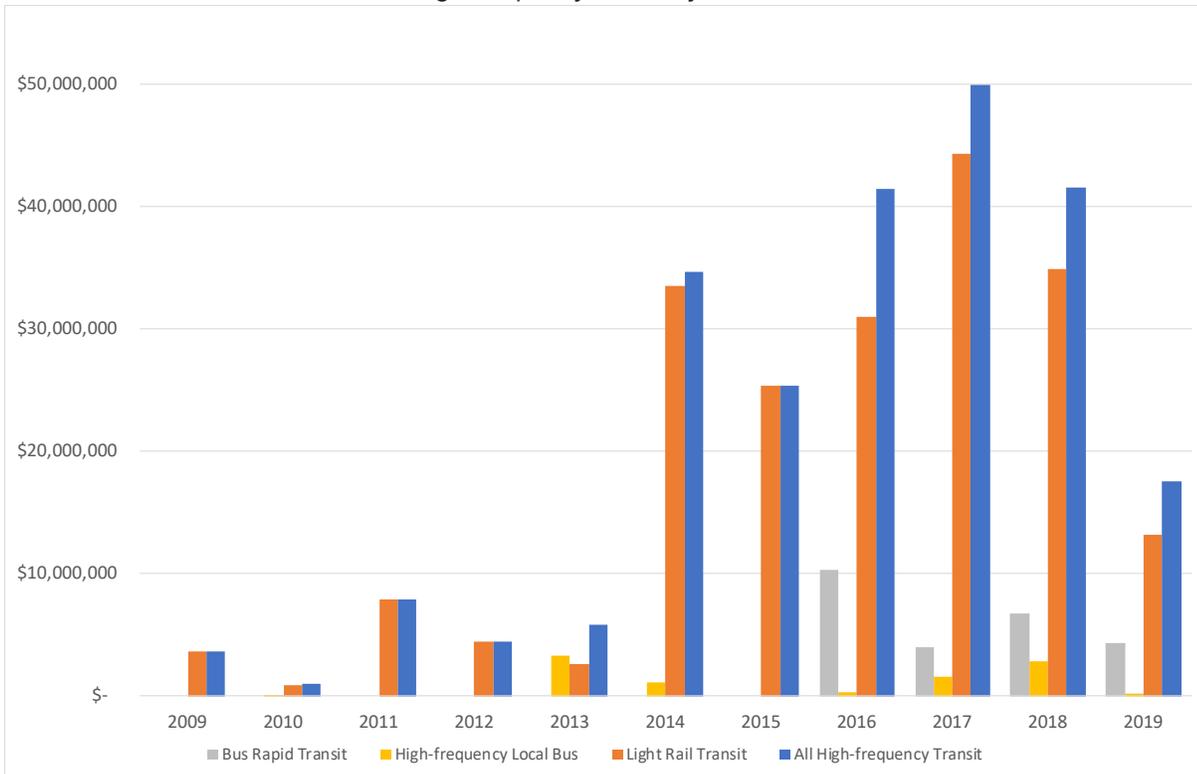


Chart 8: Industrial Permit Value near High Frequency Transit by Year



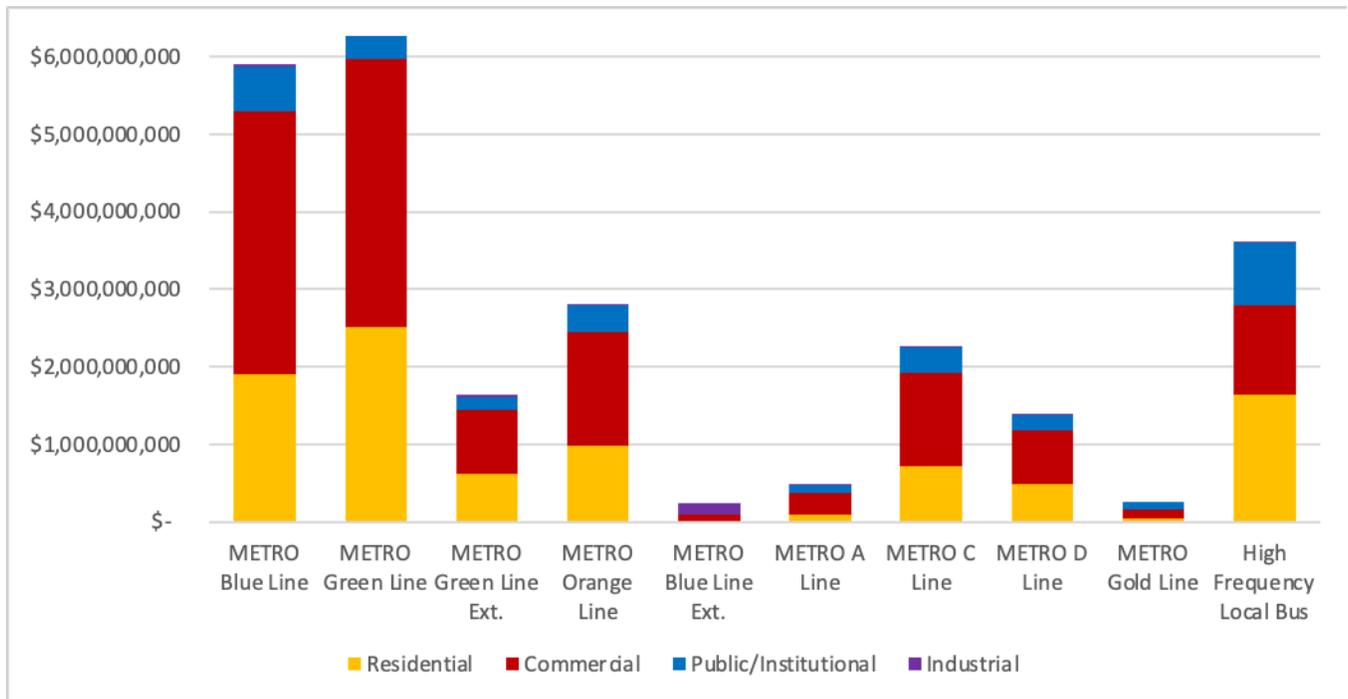
⁵ Due to the nature of the data, permits are reported for each relevant line – value may be double-counted and should be used only to indicate share by line.

Permitted Development by Transitway and High Frequency Local Bus

Of the \$13.8 billion in development being permitted near high frequency transit, 67% is served by LRT, 30% by BRT, and 26% by high frequency local bus. The well-established Blue and Green LRT lines serve 43% and 50% of development value within transit respectively. As shown in Chart 9, commercial development makes up the largest share of most Twin Cities high frequency transit

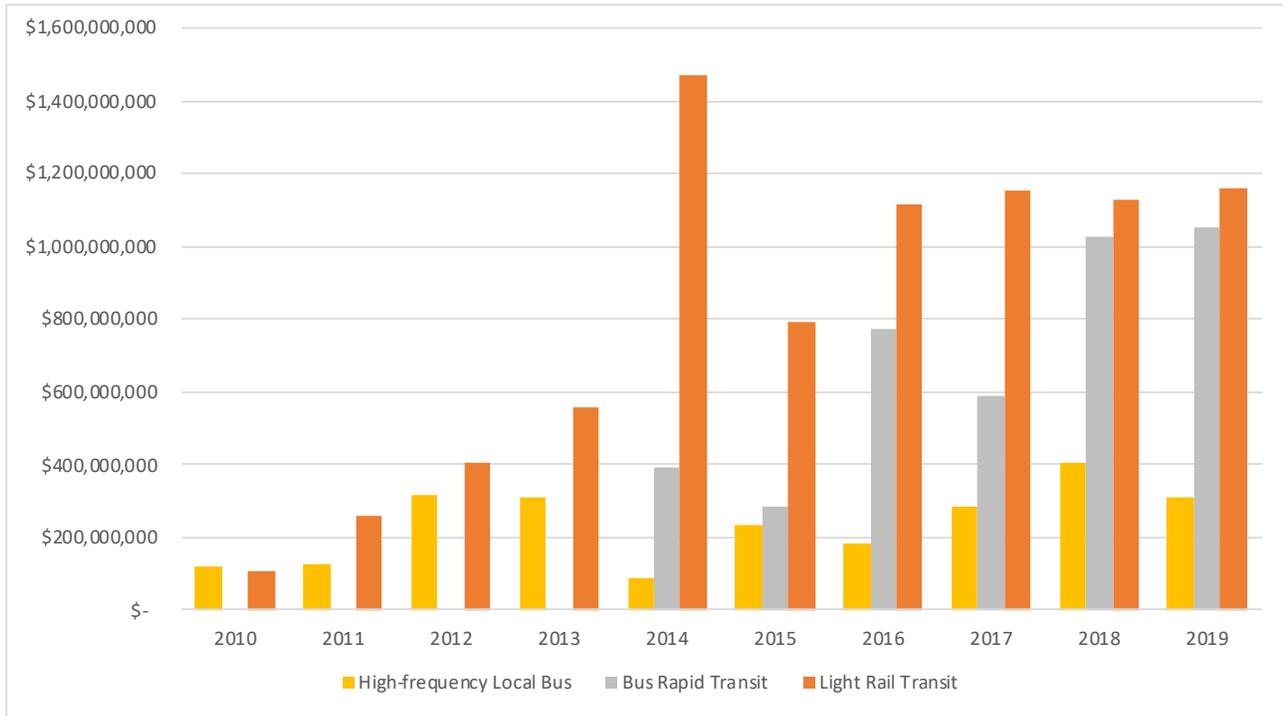
development, with residential a close second. Transit lines which are operational have generated the most permit value, though development values along each transitway are generally increasing, as seen in Chart 10, which shows development value over time by transit mode.

Chart 9: Permitted Development Value by Transitway (Residential 2009-2019; Commercial, Public/Institutional, Industrial 2003-2019)⁶



⁶ Permits are reported for each line – value may be double-counted.

Chart 10: Permitted Development Value near High Frequency Transit by Transit Mode Over Time



In Chart 10, the \$1.5 billion in permit value located near LRT for 2014 includes the nearly \$800 million construction of the U.S. Bank Stadium. Even considering only the remaining \$703 million in permit value for 2014, the data suggest that permitted development near high frequency transit has been increasing steadily, with development near BRT stations rapidly growing to nearly match development near LRT in 2019.

Percentage of Regional Development (Seven-County) served by high frequency transit

The area served directly by high frequency transit is just 3% of the region's total land area but contains more than 35% of the region's permitted development value. The areas served by light rail transit alone represent 30% of the permitted development value on just 1.2% of the region's land area. As more development locates near high frequency transit, the benefits of living and working near high frequency transit increase, which encourages more development to locate near high frequency transit.

When developments are categorized by type, we find that the following percentages of development have located near high frequency transit:

- Residential: 43%
- Commercial: 39%
- Public/Institutional: 29%
- Industrial: 7%
- Total: 35.5%

The following charts show permitted development value by transit mode, time, and the share of regional development value served by transit. In the first few years permit data was collected, roughly 20% of regional development

was located near high frequency transit. In recent years, around 40% of regional development has occurred near high frequency transit. Compare the gradual increase in regional share over time to the increase in permit value over time – although the share of development served by transit in the Twin Cities region is increasing slowly, the value of development served by transit has increased markedly over the same period, even putting aside the late addition of residential permit value data.

Although development is occurring throughout the Twin Cities metropolitan region – as shown in the maps throughout this report – the greatest concentration of permit value clearly lies within the central business district of Minneapolis, as shown in the Permit Value Density Map. Other development cores like downtown St. Paul, the Uptown neighborhood of Minneapolis, and the University of Minnesota are also locations of intense development activity.

These permit value hotspots correlate with areas of increased transit density, where more than one high frequency transit route is available (see transit density inset in Appendix B).

Chart 11: Development Type near High Frequency Transit by Transit Mode

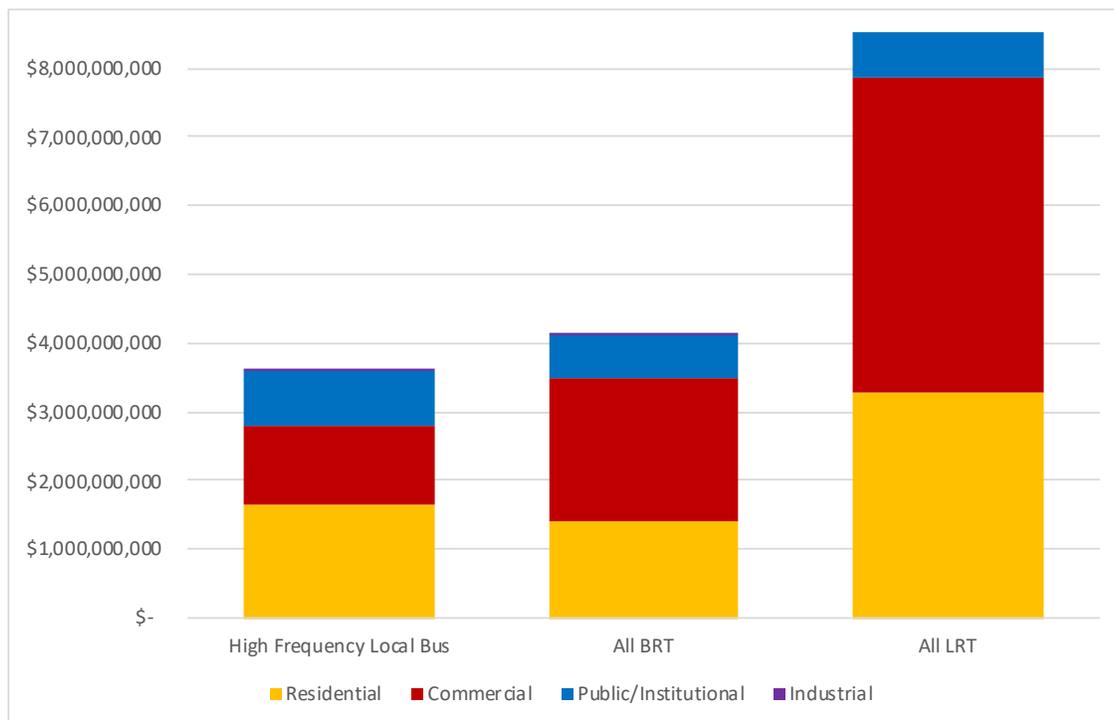


Chart 12: Permitted Development Value occurring near High Frequency Transit over time

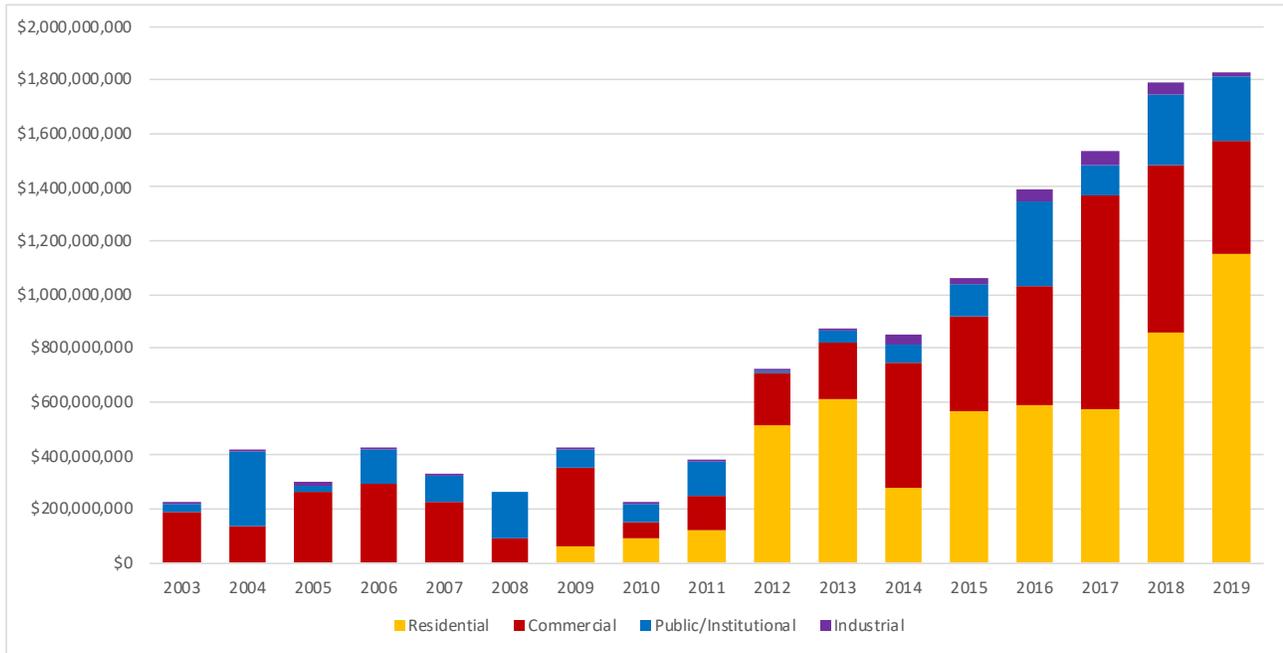


Chart 13: Percentage of Permitted Development near High Frequency Transit (all years)

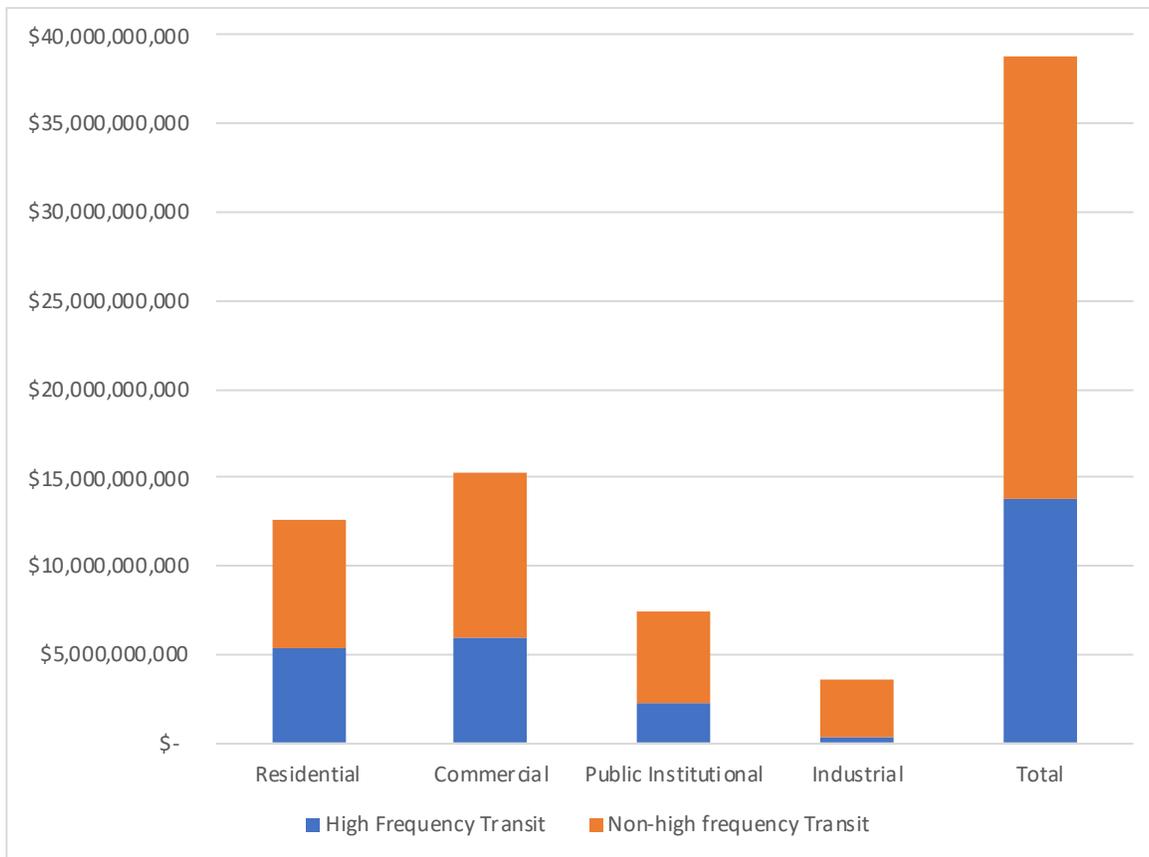
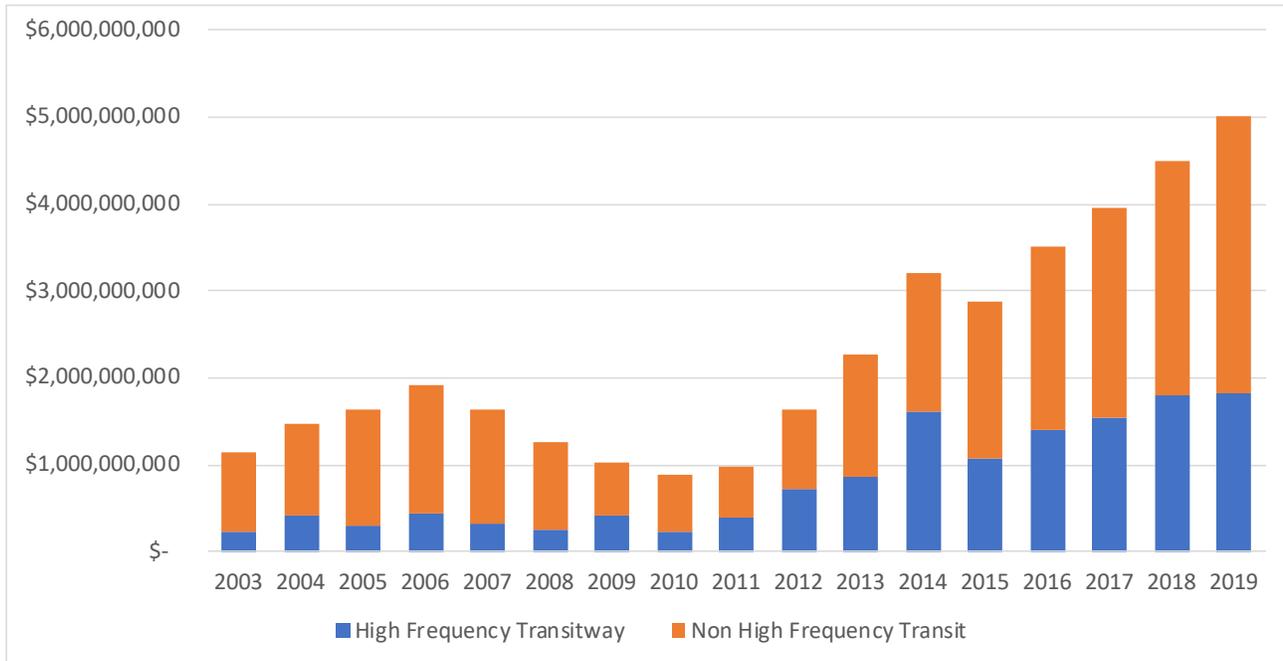


Chart 14: Share of Regional Development Served by High Frequency Transit per year



Planned Development

Over the past decade, development has increasingly located along high frequency transit. In 2003, the first year this data was collected, less than 20% of regional development occurred near high frequency transit. In 2019 36% of regional development occurred near high frequency transit. Looking forward, the Council has identified \$8.2 billion in development that is planned near high frequency transit. This represents over 60% of the planned development in the region. Most dramatically, 80% of all mixed-use development (mostly commercial/residential) is planned near high frequency transit.

PLANNED Development Highlights:

- \$8.9 billion in development is planned along high frequency transit. This represents 60% of the development planned in the region.
 - \$5.9 billion in development near LRT stations
 - \$4.9 billion in development near BRT stations
- 35,000 multifamily units are currently planned along high frequency transit. This represents 43% of the units planned in the region.
 - 19,000 units are planned near LRT stations
 - 17,000 units are planned near BRT stations
 - 60% are planned as part of a mixed-use development
- Nearly 55% of planned development in the region is mixed use. 76% of mixed use development is near high frequency transit.
- Just under 70% of commercial, residential and public and institutional development is planned near high frequency transit



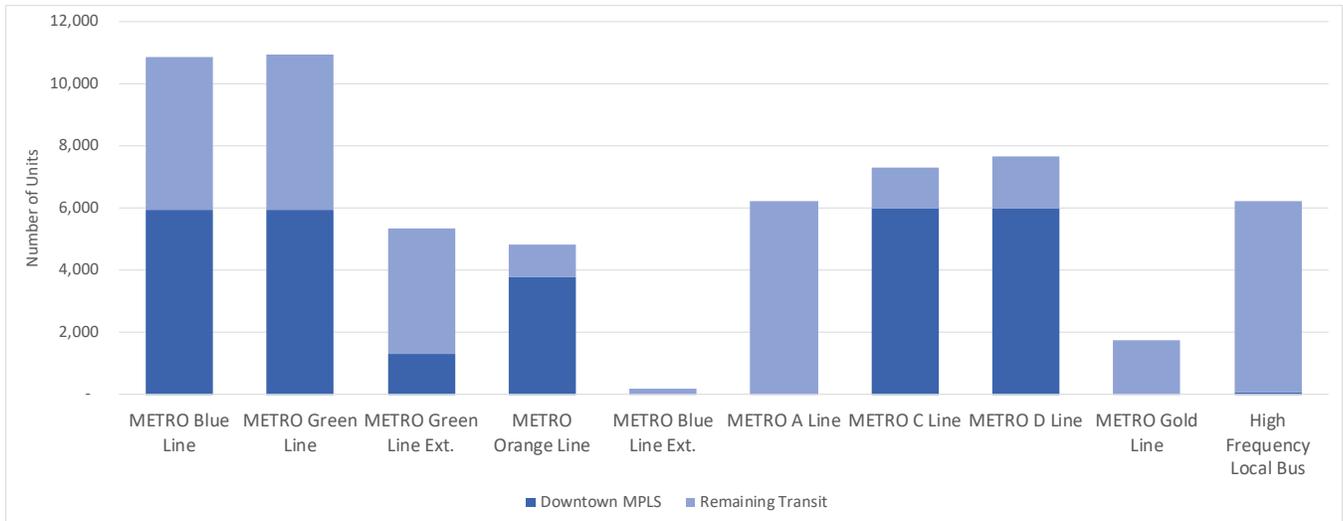
Planned Multifamily Residential

More than 29,000 multifamily units are currently planned along high frequency transit. This represents 43% of the units that are planned for the region. 19,500 units are planned near LRT stations and 17,000 units are planned near BRT stations. Some of these units are planned near both LRT and BRT. Over half of the multifamily units planned along high frequency transit are planned as part of a mixed-use development.

As depicted in the chart below, the Green Line and Blue Line are expected to see the most residential development.

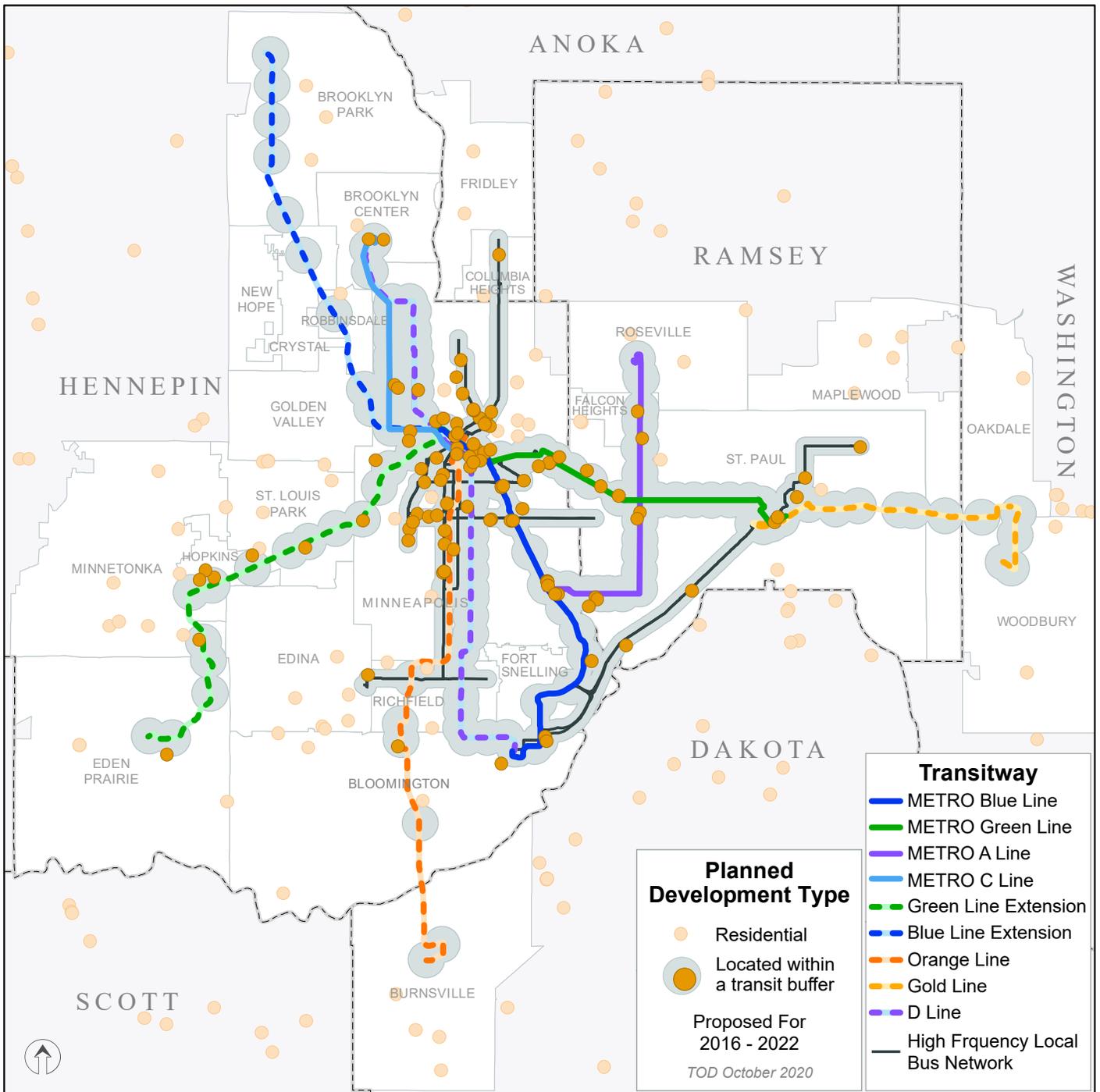
However, significant development is also planned along the BRT routes, high frequency local bus routes and the Green Line Extension. Based on the projects currently planned within the region, downtown Minneapolis will continue to receive a significant share of the residential units for the region (18%). This trend fits well with established density and land use patterns, and the continued support of the high frequency transit system. As other transit lines outside the downtown core become operational, other residential areas will likely take on an increased share of the region's development.

Chart 15: Planned Multifamily Units near High Frequency Transit⁷



⁷ Permits are reported for each line – value may be double-counted.

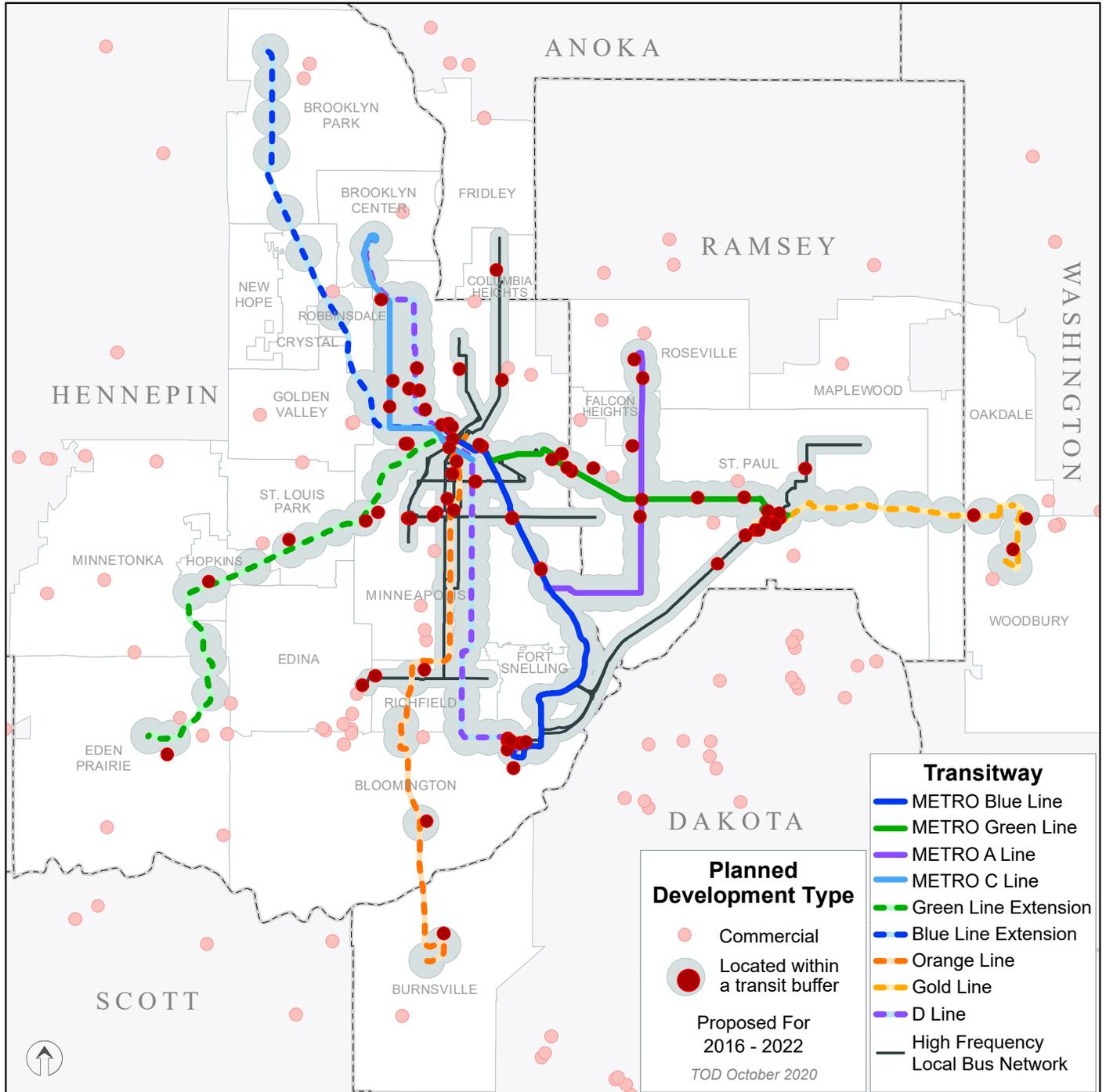
Map 5: Planned Multifamily Development



Map 5 shows the locations of planned multifamily development across the region. Because not all developers advertise the number of units or the value of the development, the map does not scale the development by size. As is evident from the map, residential developments are clustered most intensely around downtown Minneapolis. Residential clusters can also be found in Uptown Minneapolis, around the University of Minnesota and in downtown St. Paul.

Commercial

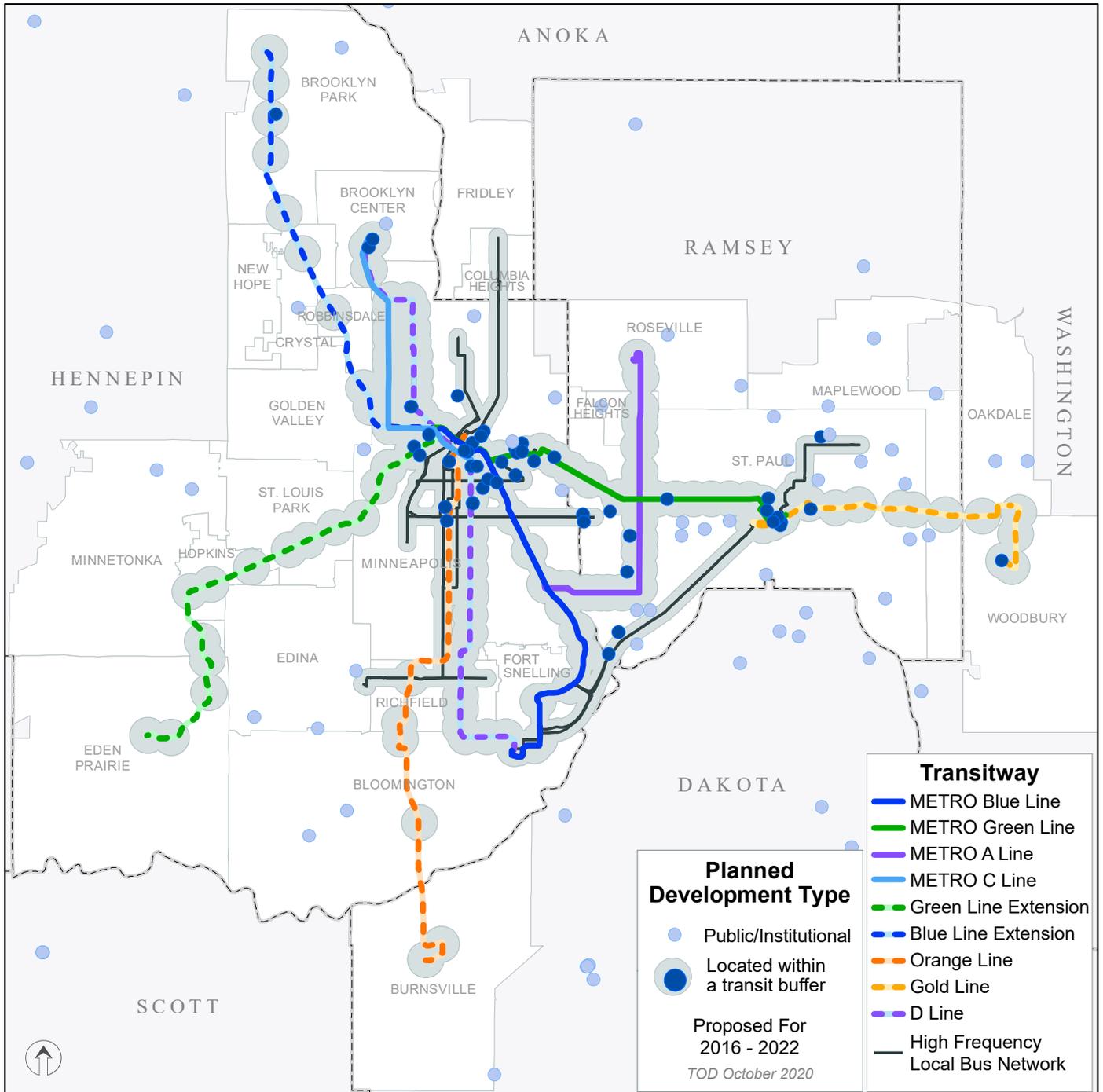
Map 6: Planned Commercial Development



Map 6 shows the locations of planned commercial development across the region. As is evident from the map, commercial developments are clustered most intensely around downtown Minneapolis. Commercial clusters can also be found in downtown St. Paul and in Bloomington around Mall of America.

Public and Institutional

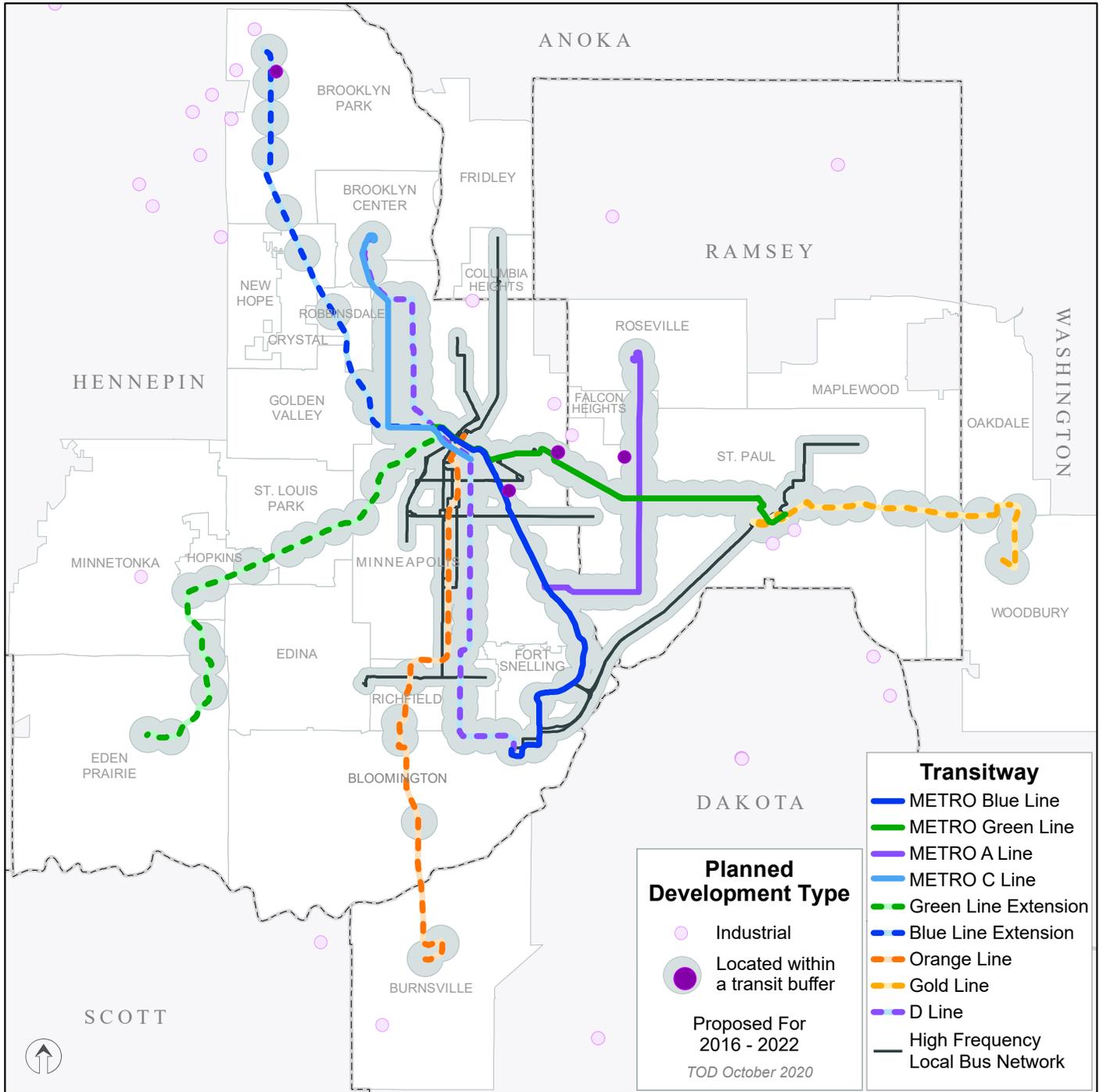
Map 7: Planned Public and Institutional Development



Map 7 shows the locations of planned public and institutional development across the region. No trends are immediately apparent from the map.

Industrial

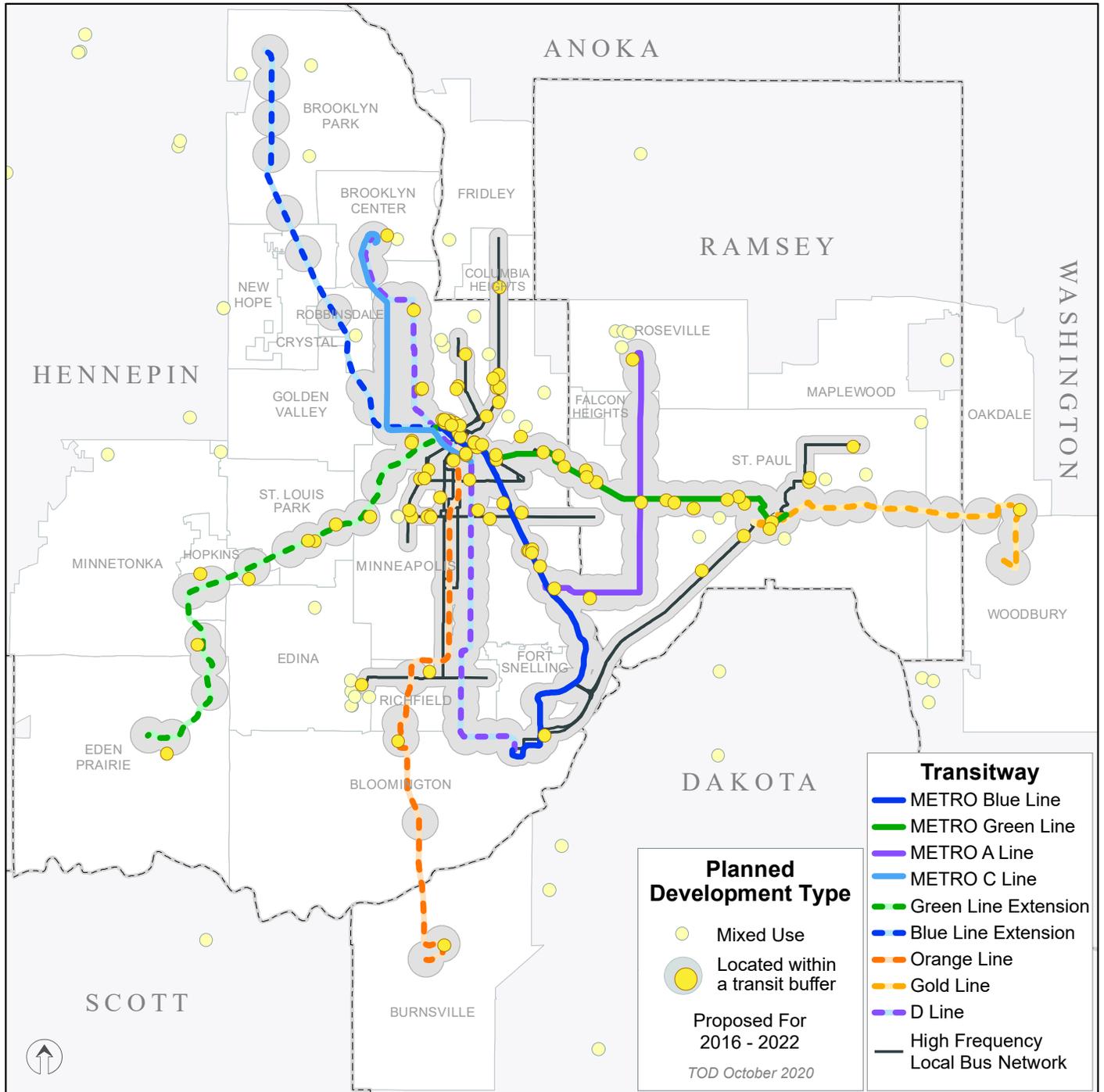
Map 8: Planned Industrial Development



Map 8 shows the locations of planned industrial development across the region. No trends are immediately apparent from the map.

Mixed Use

Map 9: Planned Mixed Use Development



Nearly 80% of mixed use development is planned near high frequency transit (Map 9). More than 99% of the mixed-use development is a blend of commercial and residential development. Mixed-use development is not clustered in the same way that residential or commercial specific development is clustered. Still, mixed-use developments are clearly planned along the Green and Blue lines and in areas served by high frequency transit.

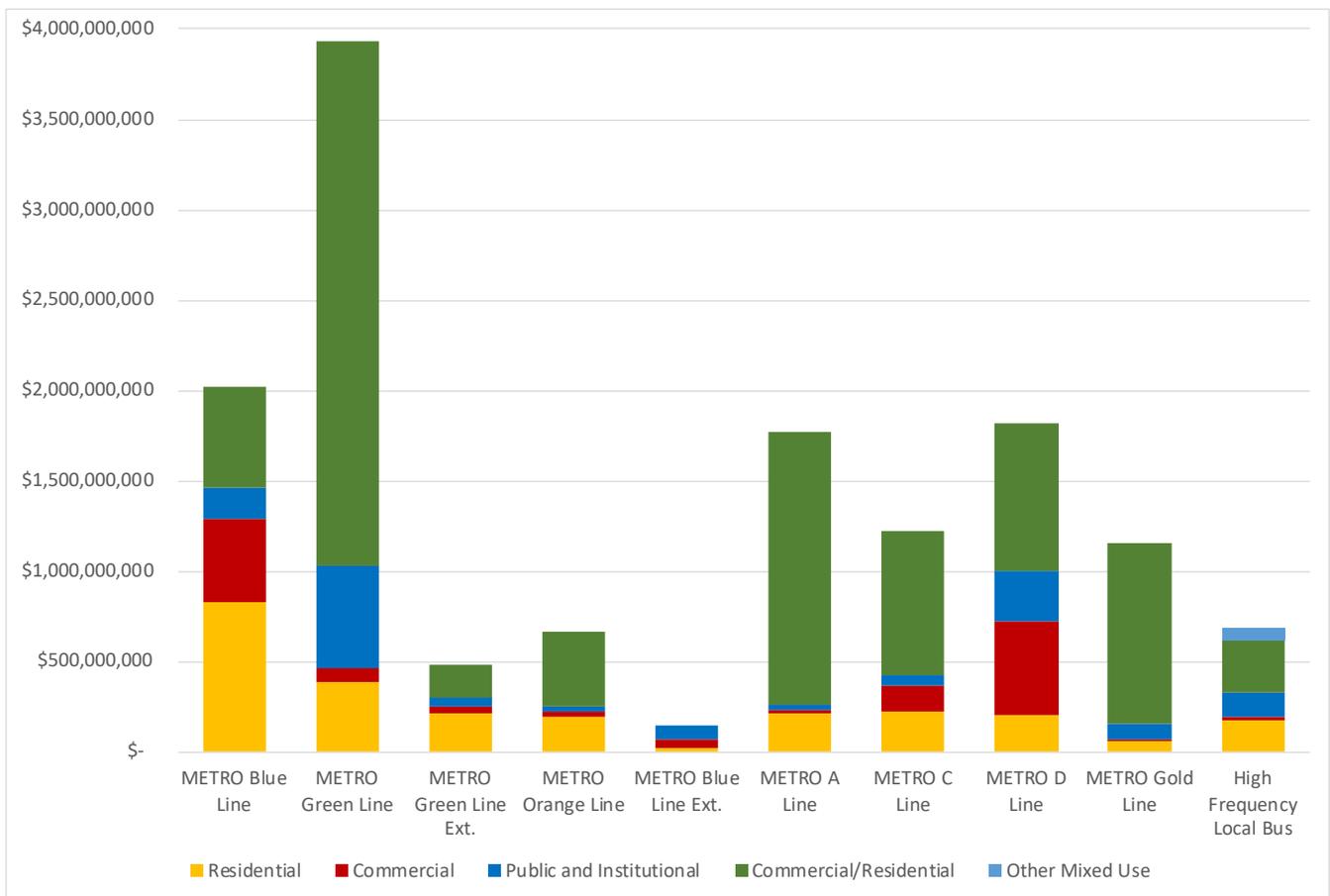
Planned Development by Transitway and High Frequency Local Bus

The Council has identified over \$13 billion in planned development. Of that, \$8.9 billion (68%) is planned near high frequency transit. \$5.6 billion in development is planned near LRT stations. \$4.9 billion in development is planned near BRT stations. Some of these developments are planned in areas served by both LRT and BRT.

development, more than \$3.9 billion is planned along the Green Line, which is nearly twice the development that has been planned along other high frequency transitways. Nonetheless, more than \$1 billion each in development has been planned along the Blue Line, A Line, C Line, D Line, and Gold Line.

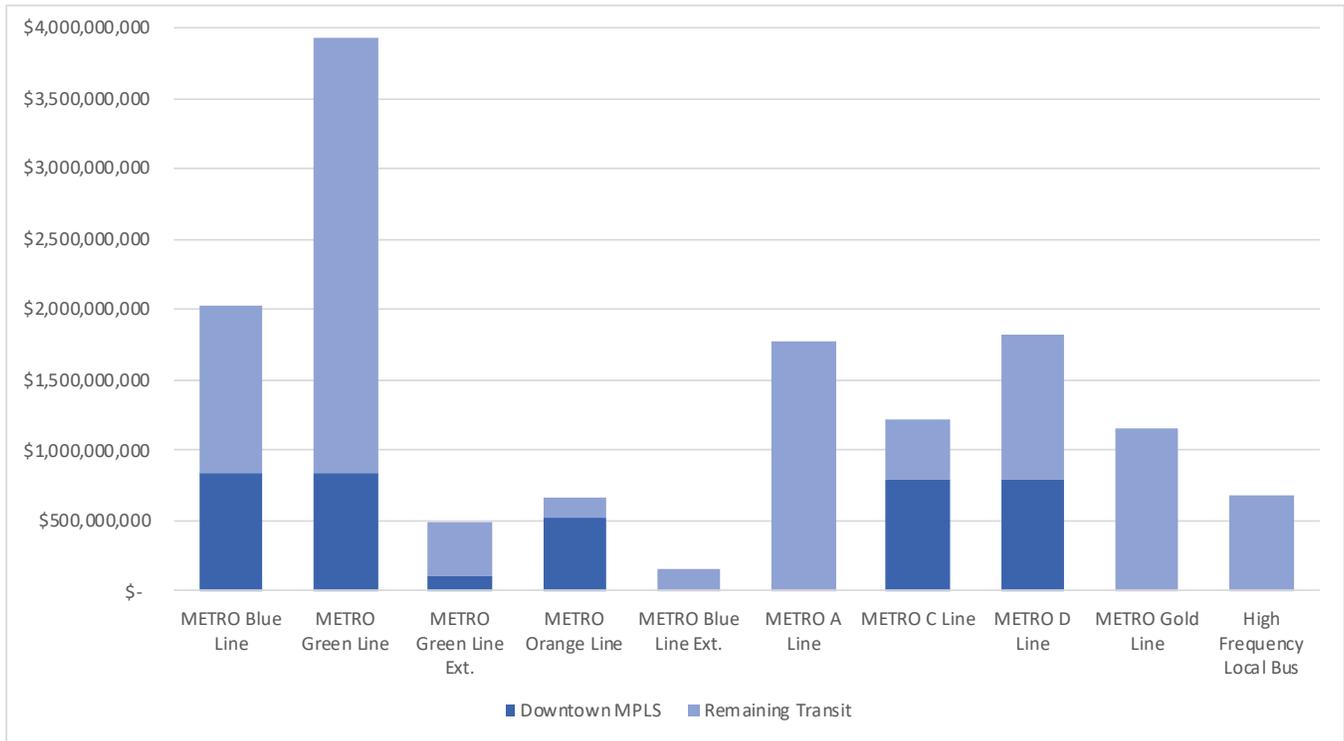
Chart 16 shows the value of development by type that is planned for each transitway. The majority of this development is commercial/residential, which means that it combines commercial and residential uses. Of the planned

Chart 16: Value of Planned Development by Transitway⁸



8 Permits are reported for each line – value may be double-counted.

Chart 17: Value of Planned Development by Transitway in Downtown⁹



As shown in Chart 17, when all development types are considered it becomes clear that areas outside the downtown Minneapolis core are also anticipating development investments along transit. The Green Line in particular is anticipating adding nearly \$4 billion in development value thus far, with the majority of that development planned outside downtown Minneapolis.

⁹ Permits are reported for each line – value may be double-counted.

Percentage of Planned Development (Seven-County) served by high frequency transit

Chart 18 shows the value of planned development near high frequency transit by development type relative to the region. As can be seen in this chart, mixed use development accounts for nearly half of all planned development. Most of these mixed-use developments are a blend of commercial and residential development. Chart 19 shows the share of planned development near high frequency transit by type relative to the region. For context, the areas served by high frequency transit represent just 3% of total acreage in the region. Seventy-six percent of

mixed-use development is planned near high frequency transit. Roughly 76% of commercial, 53% of residential and 63% of public and institutional development is planned near high frequency transit. 100% of industrial development (by value) is currently planned outside areas served by high frequency transit. Map 8 does identify four industrial developments that are planned near high frequency transit, but no estimate of development value is available for these developments.

Chart 18: Value of Planned Development near High Frequency Transit by Development Type

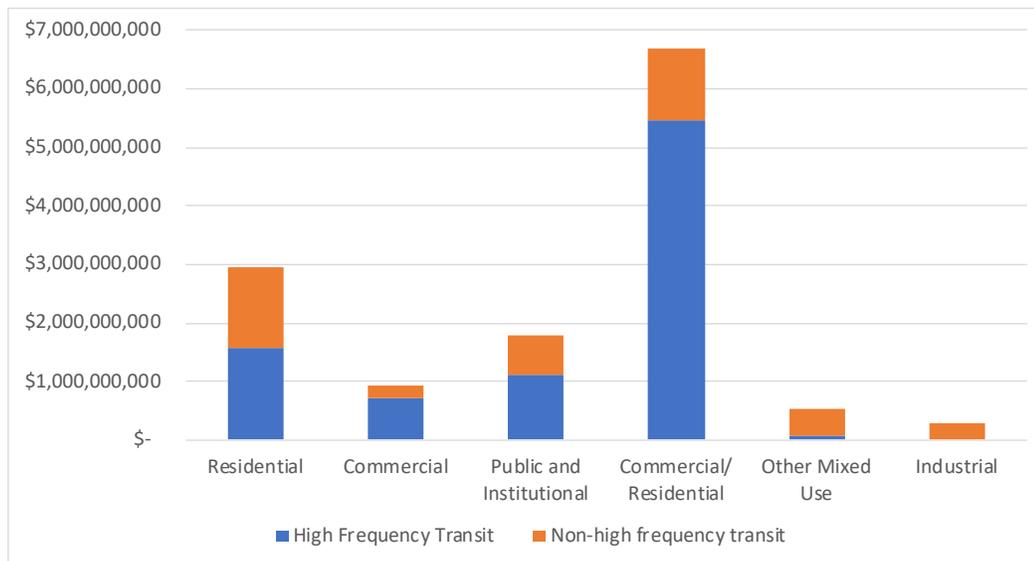
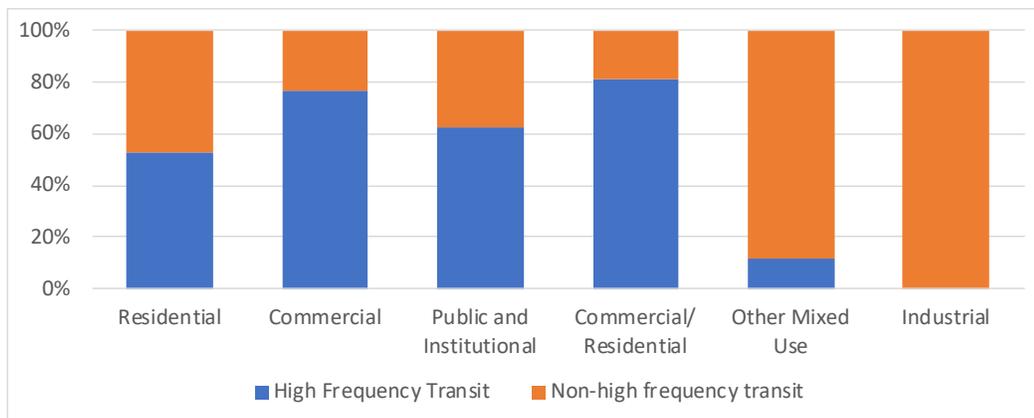


Chart 19: Share of Planned Development near High Frequency Transit by Development Type



Contact Information

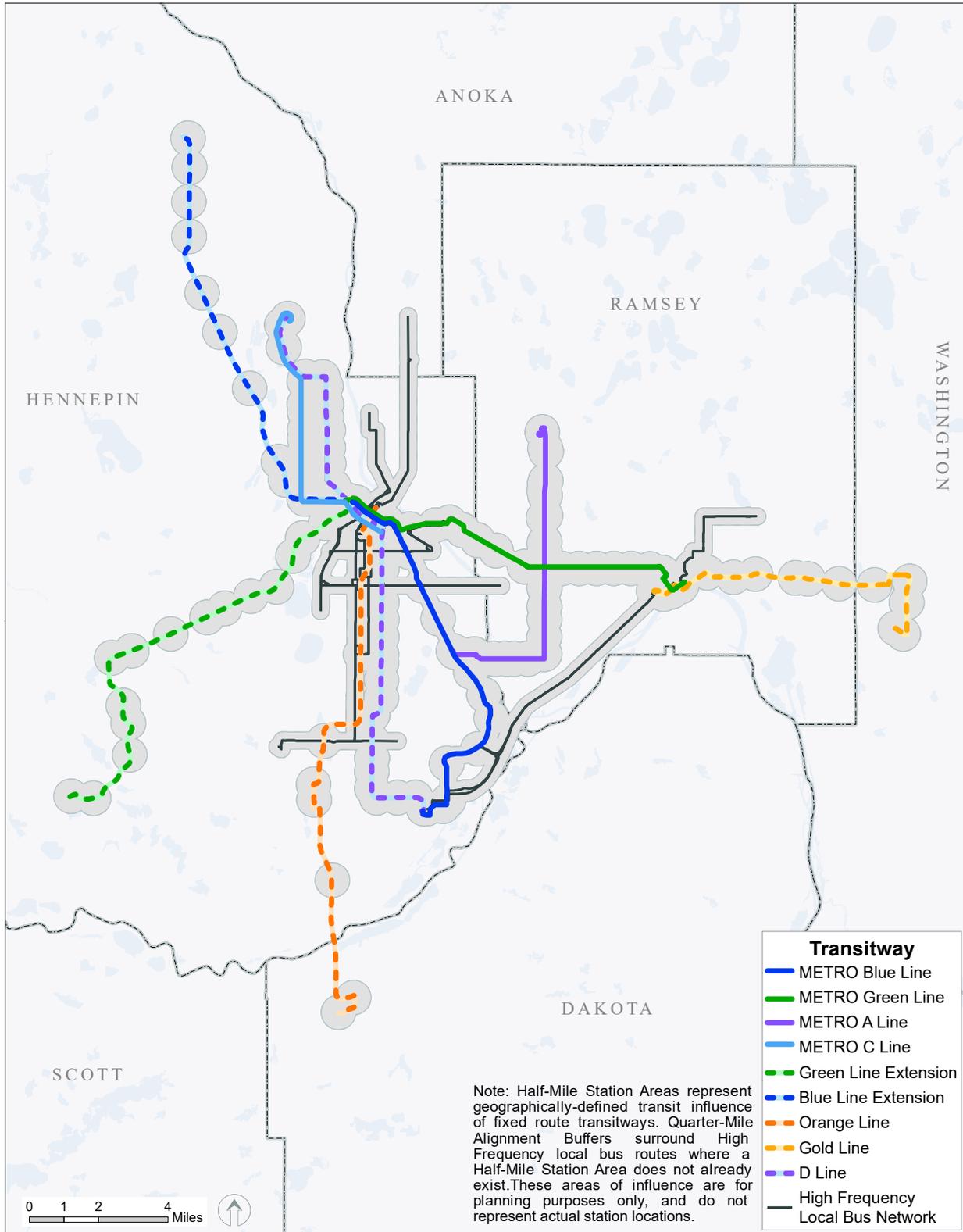
For questions or comments on the information included in this report, please email us at TOD@MetroTransit.org, or check out our website at metrotransit.org/tod.

Data from the Metropolitan Council's building permits survey and the Council's population forecasts are available at metrotransit.org/data.

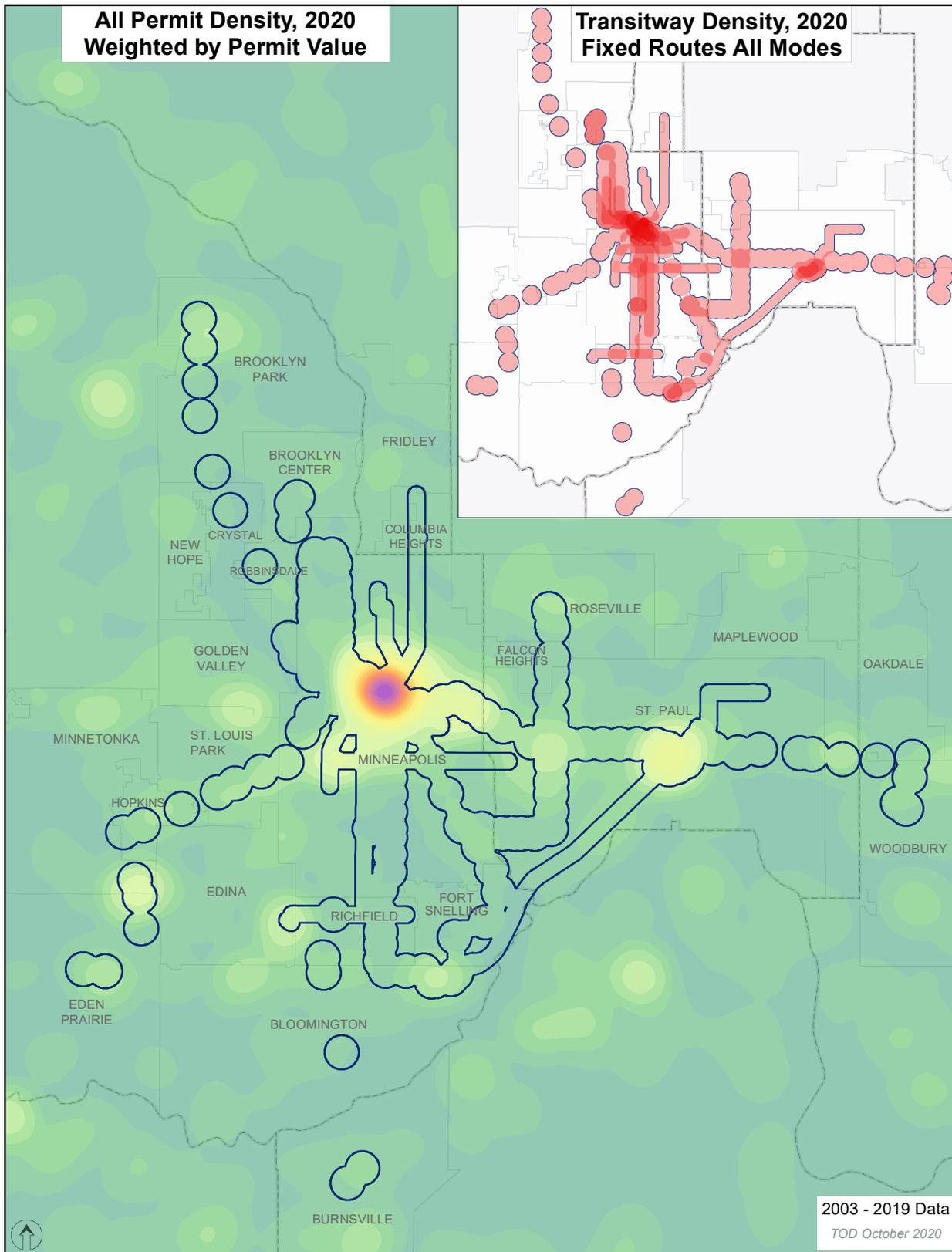


Appendix A – High Frequency Transit Map

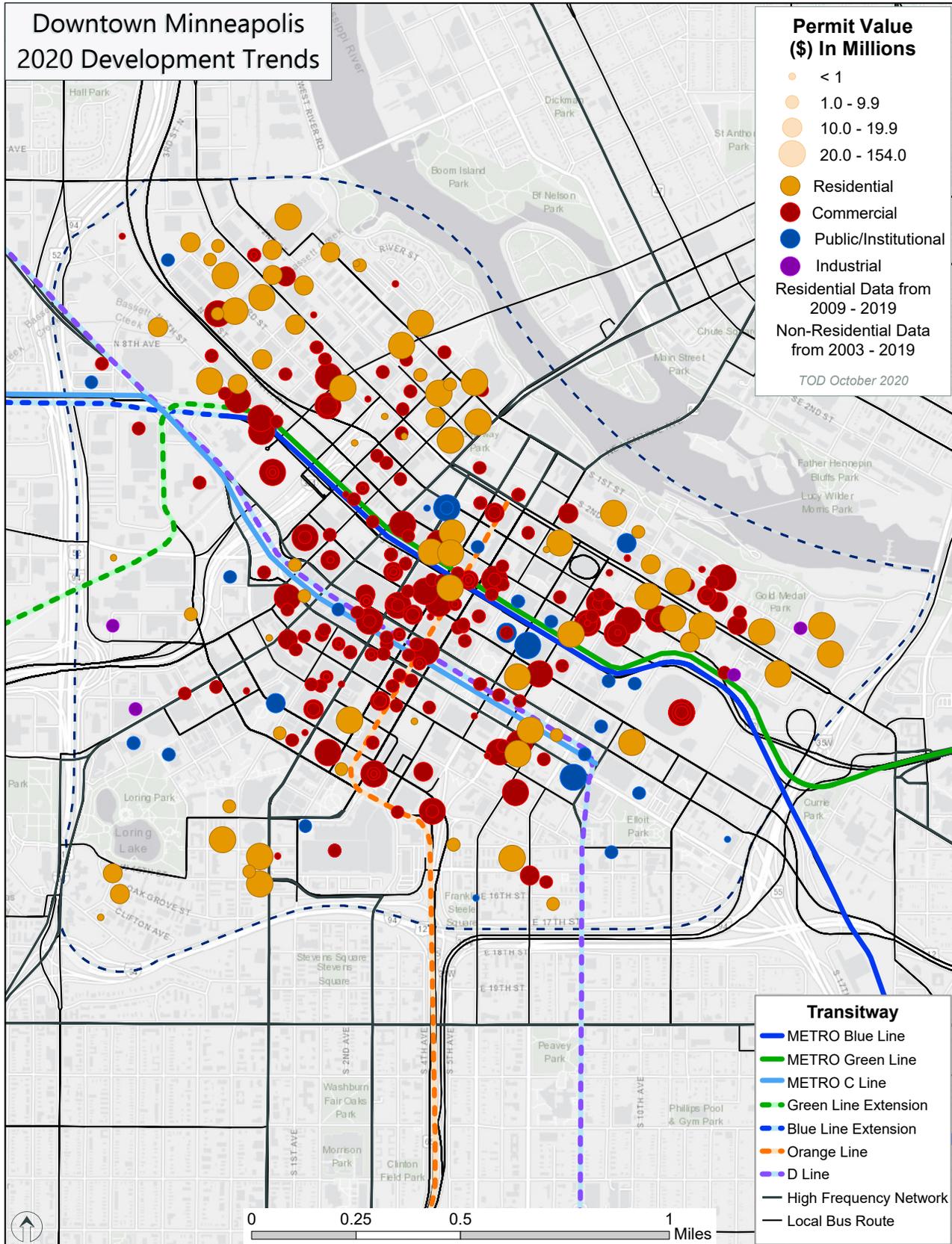
Half-Mile Station Areas and Quarter-Mile Alignment Areas



Appendix B – Value Density Map



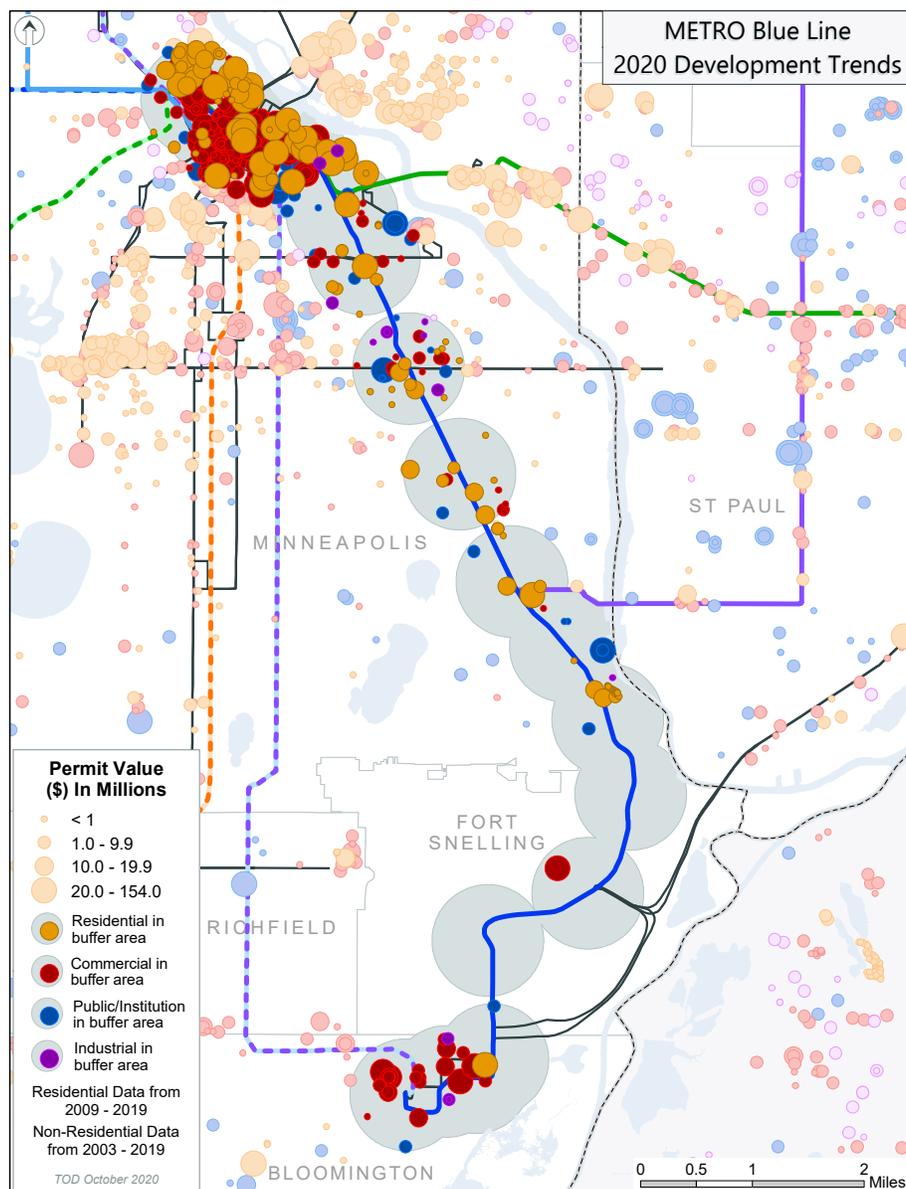
Appendix C – Downtown Minneapolis



Appendix D – Development by Transitway

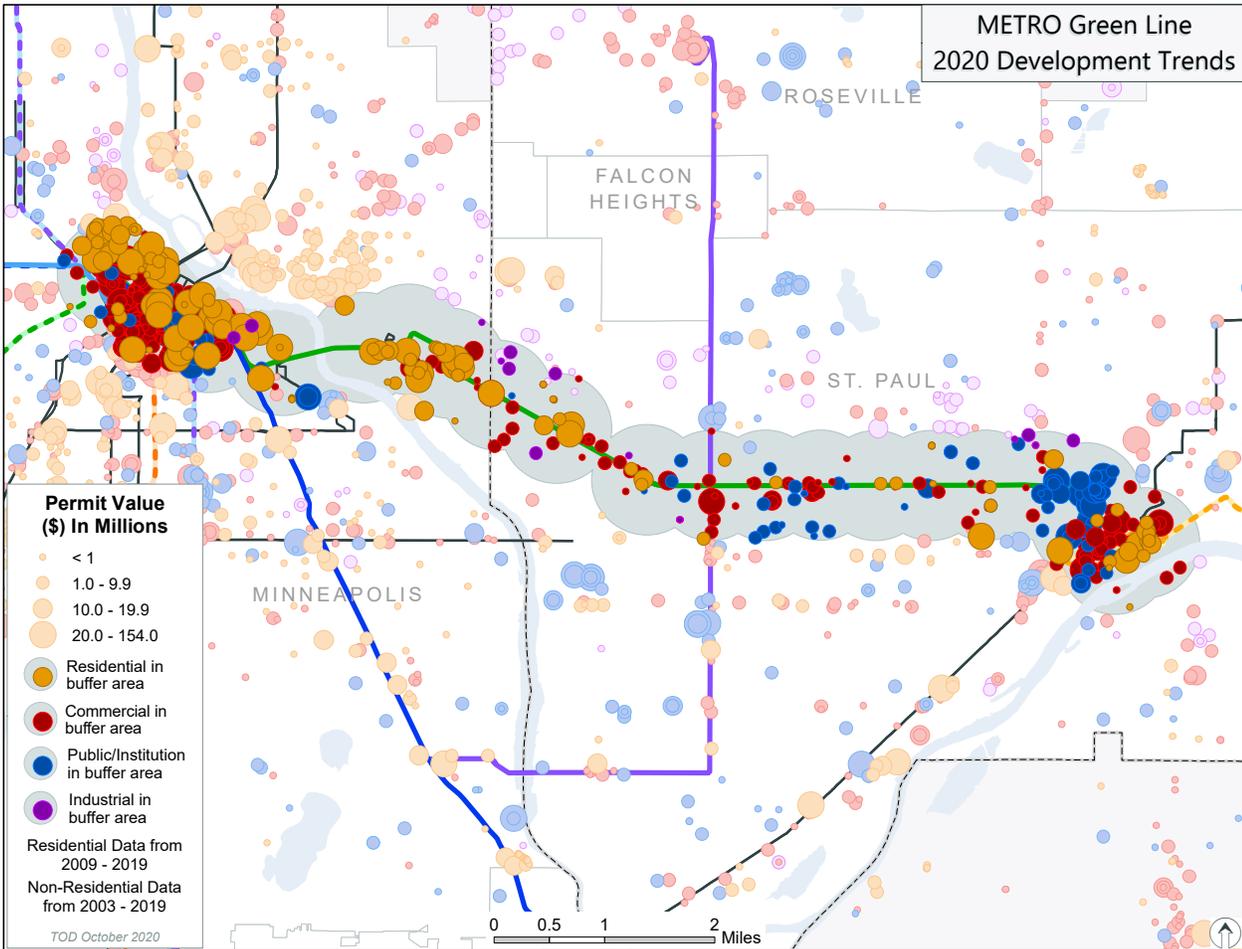
METRO Blue Line

| Development Types | Permitted Development | Planned Development |
|------------------------------|-----------------------|---------------------|
| Residential (Units) | 10,422 | 10,861 |
| Residential (Value) | \$1,898,101,522 | \$828,958,000 |
| Commercial (Value) | \$3,394,256,868 | \$462,000,000 |
| Public/Institutional (Value) | \$582,108,895 | \$176,000,000 |
| Industrial | \$21,921,930 | N/A |
| Mixed Use (Value) | N/A | \$552,900,000 |
| Total (Value) | \$5,896,389,215 | \$2,019,858,000 |



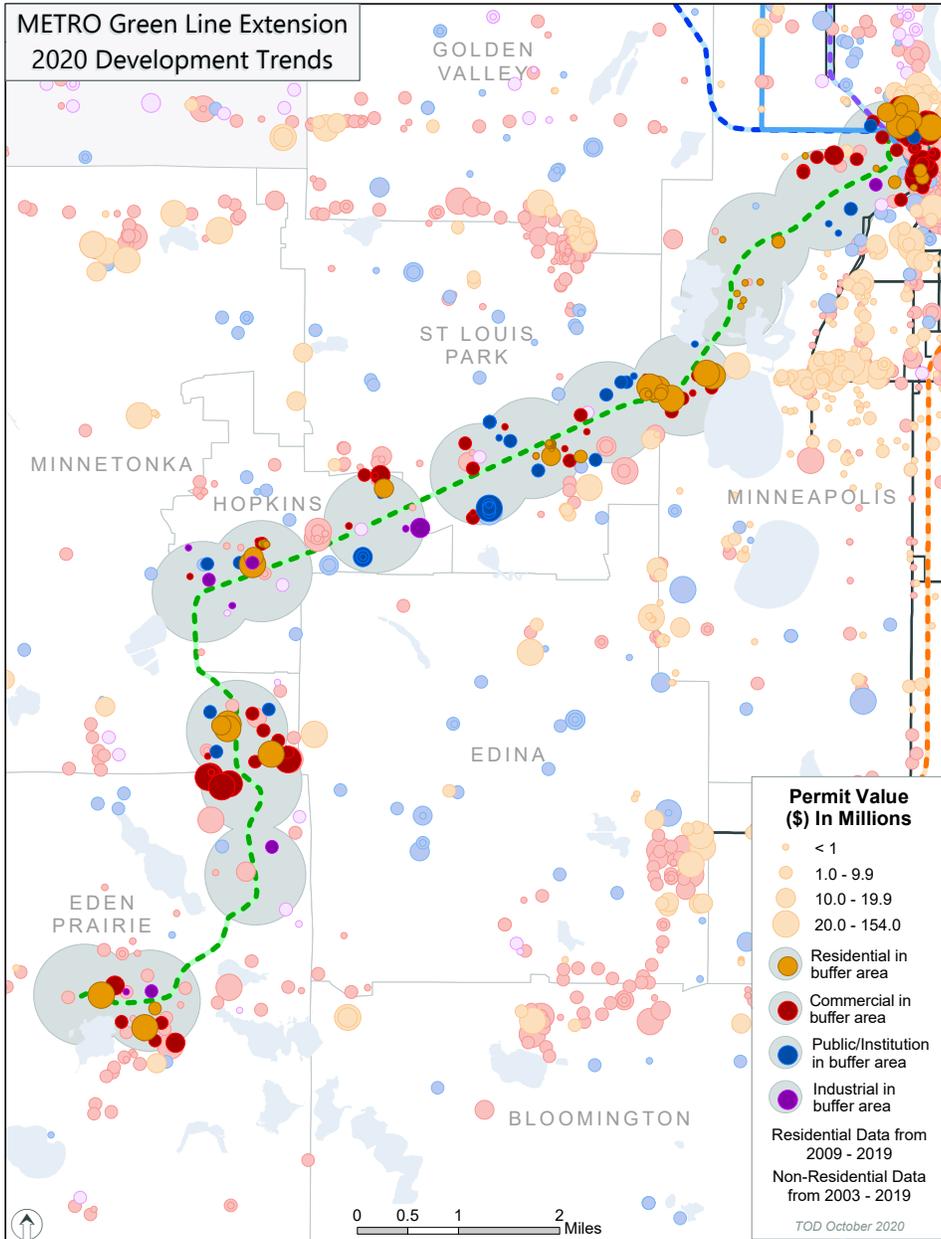
METRO Green Line

| Development Types | Permitted Development | Planned Development |
|------------------------------|-----------------------|---------------------|
| Residential (Units) | 15,176 | 10,951 |
| Residential (Value) | \$2,511,790,136 | \$387,400,000 |
| Commercial (Value) | \$3,462,260,869 | \$75,700,000 |
| Public/Institutional (Value) | \$887,074,492 | \$568,100,000 |
| Industrial | \$21,930,695 | N/A |
| Mixed Use (Value) | N/A | \$2,897,800,000 |
| Total (Value) | \$6,883,056,192 | \$3,929,000,000 |



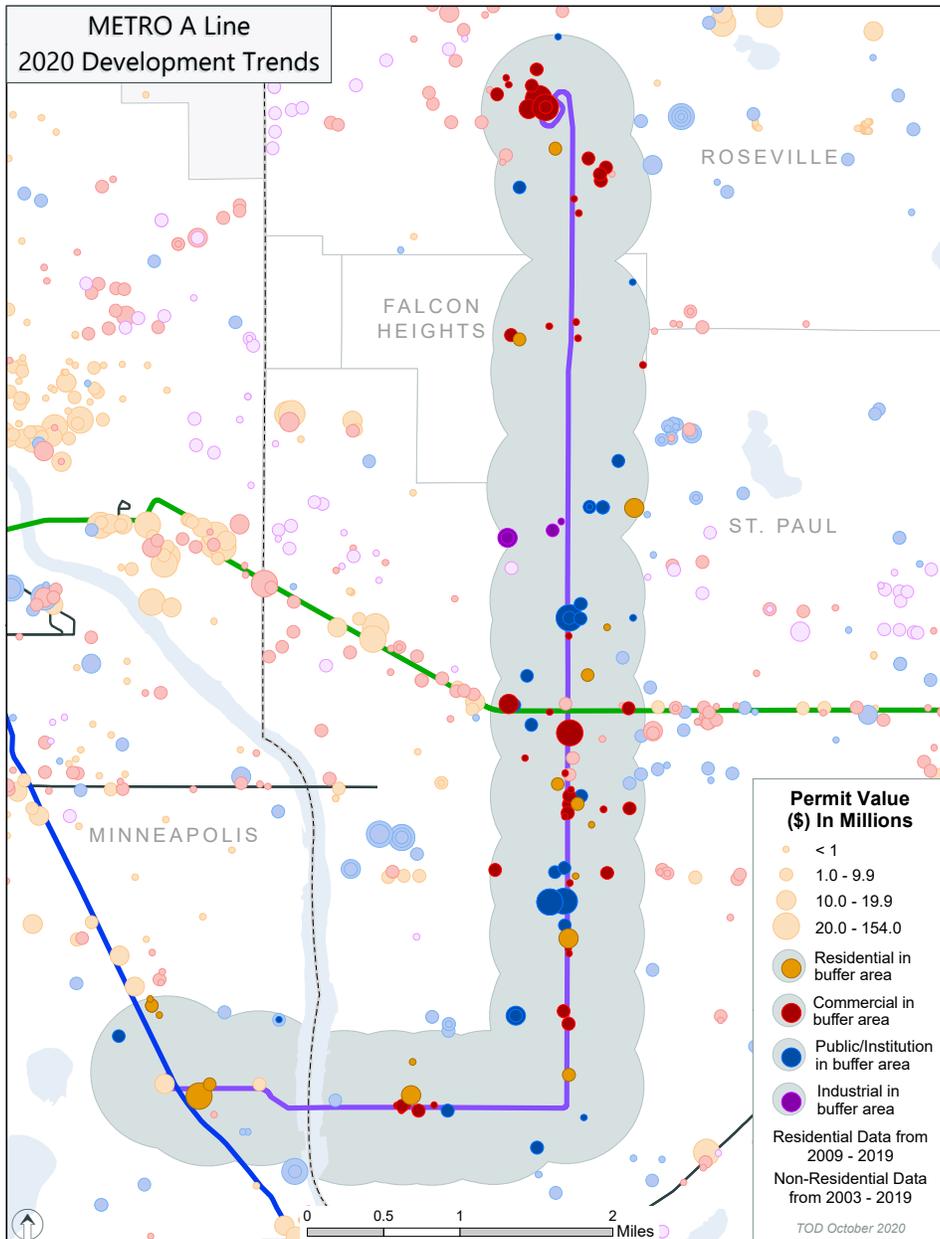
METRO Green Line Extension

| Development Types | Permitted Development | Planned Development |
|------------------------------|-----------------------|---------------------|
| Residential (Units) | 4,166 | 5,335 |
| Residential (Value) | \$621,391,820 | \$212,200,000 |
| Commercial (Value) | \$824,638,780 | \$39,000,000 |
| Public/Institutional (Value) | \$163,296,739 | \$51,000,000 |
| Industrial | \$32,550,819 | N/A |
| Mixed Use (Value) | N/A | \$184,100,000 |
| Total (Value) | \$1,641,878,158 | \$578,000,000 |



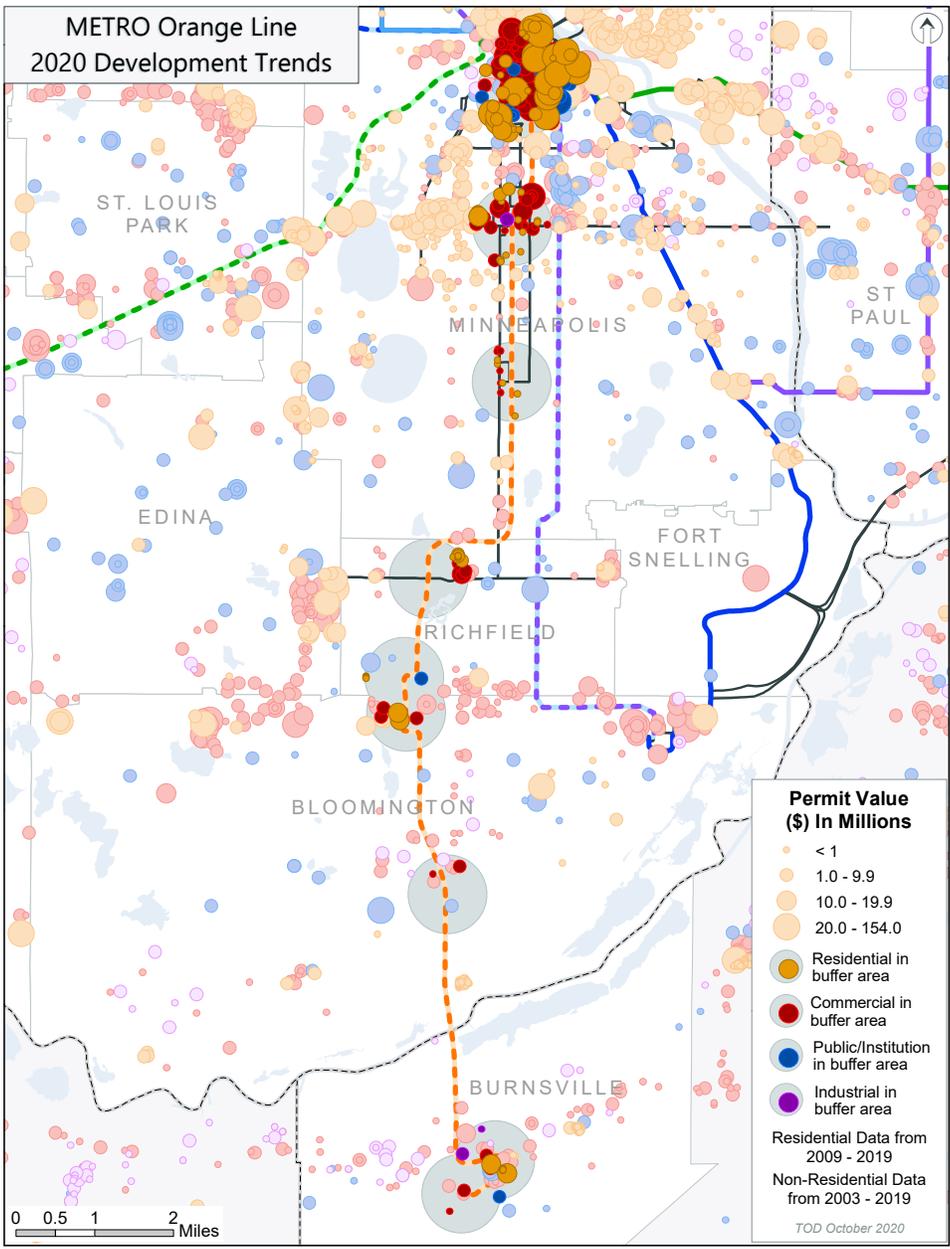
METRO A Line

| Development Types | Permitted Development | Planned Development |
|------------------------------|-----------------------|---------------------|
| Residential (Units) | 1,184 | 6,238 |
| Residential (Value) | \$98,886,345 | \$211,400,000 |
| Commercial (Value) | \$277,725,417 | \$27,000,000 |
| Public/Institutional (Value) | \$92,694,085 | \$23,500,000 |
| Industrial | \$11,321,000 | N/A |
| Mixed Use (Value) | N/A | \$1,510,000,000 |
| Total (Value) | \$480,626,847 | \$1,771,900,000 |



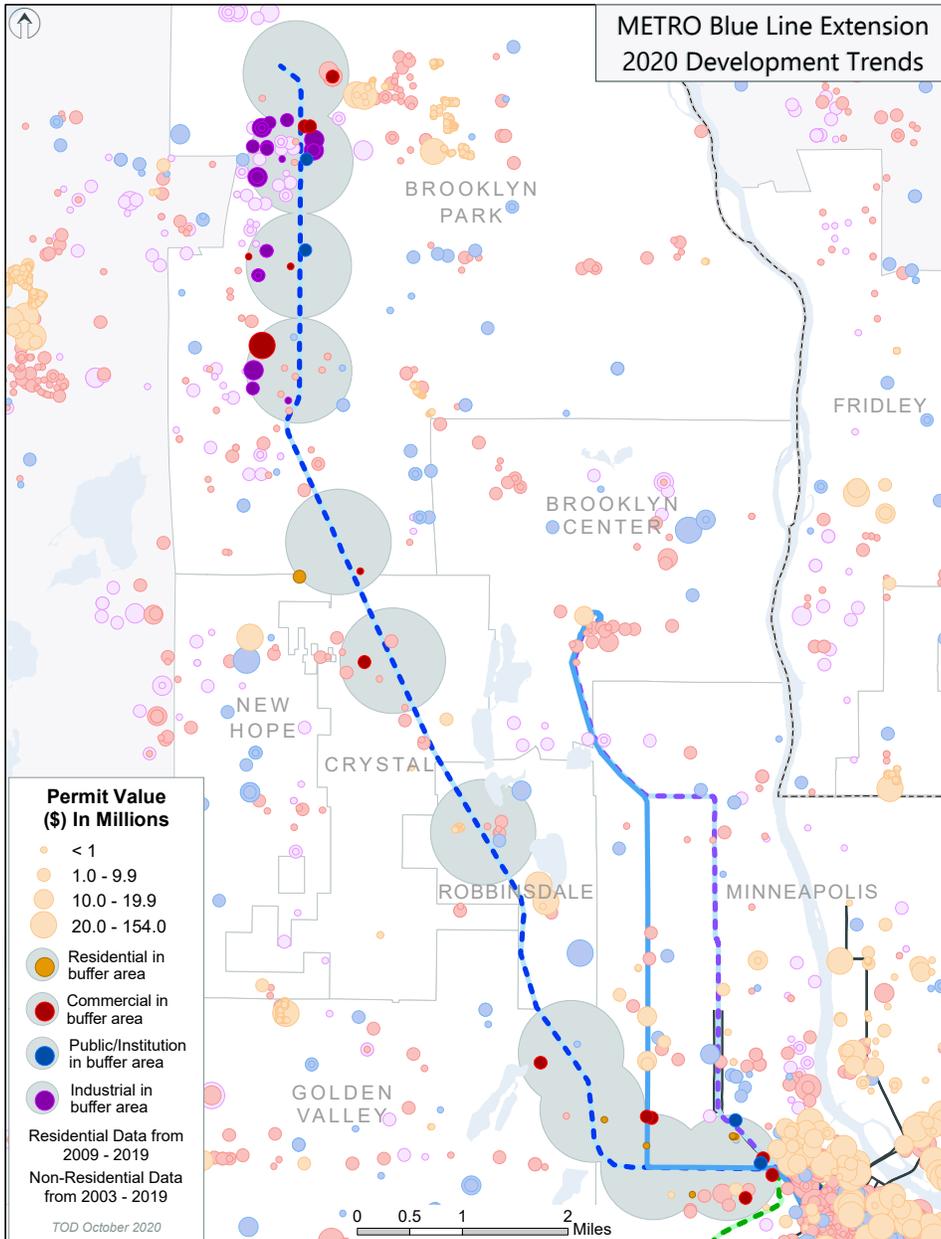
METRO Orange Line

| Development Types | Permitted Development | Planned Development |
|------------------------------|-----------------------|---------------------|
| Residential (Units) | 5,290 | 4,831 |
| Residential (Value) | \$980,963,165 | \$198,400,000 |
| Commercial (Value) | \$1,461,350,561 | \$23,100,000 |
| Public/Institutional (Value) | \$341,902,018 | \$32,000,000 |
| Industrial | \$11,029,671 | N/A |
| Mixed Use (Value) | N/A | \$412,000,000 |
| Total (Value) | \$2,795,245,415 | \$665,500,000 |



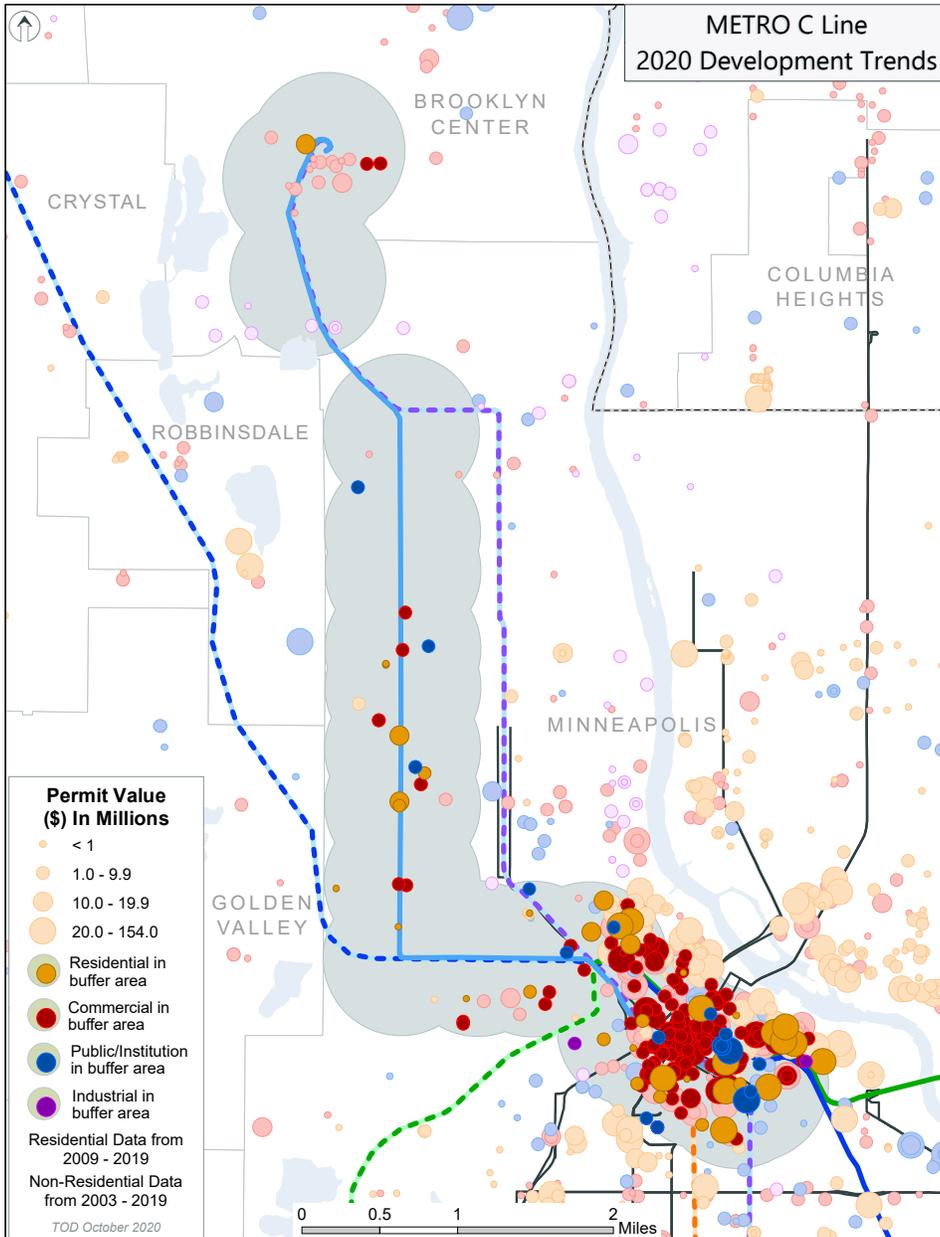
METRO Blue Line Extension

| Development Types | Permitted Development | Planned Development |
|------------------------------|-----------------------|---------------------|
| Residential (Units) | 85 | 187 |
| Residential (Value) | \$12,017,736 | \$27,791,912 |
| Commercial (Value) | \$72,705,582 | \$39,000,000 |
| Public/Institutional (Value) | \$15,012,307 | \$85,000,000 |
| Industrial | \$135,769,452 | N/A |
| Mixed Use (Value) | N/A | \$0 |
| Total (Value) | \$235,505,077 | \$151,791,912 |



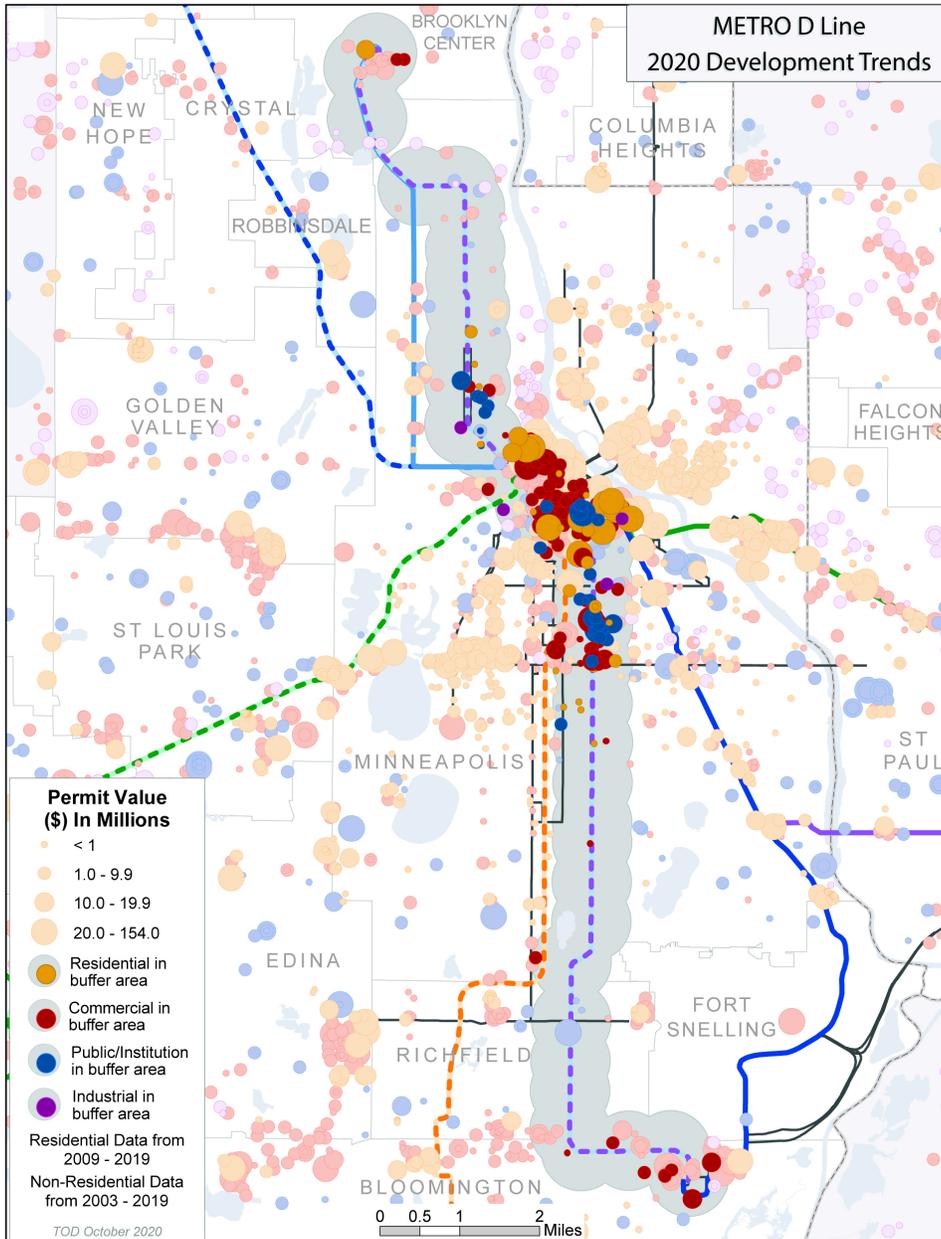
METRO C Line

| Development Types | Permitted Development | Planned Development |
|------------------------------|-----------------------|---------------------|
| Residential (Units) | 3,339 | 7,304 |
| Residential (Value) | \$715,134,935 | \$221,491,912 |
| Commercial (Value) | \$1,204,241,073 | \$151,000,000 |
| Public/Institutional (Value) | \$330,454,536 | \$54,370,000 |
| Industrial | \$2,921,105 | N/A |
| Mixed Use (Value) | N/A | \$794,000,000 |
| Total (Value) | \$2,252,751,649 | \$1,220,861,912 |



METRO D Line

| Development Types | Permitted Development | Planned Development |
|------------------------------|-----------------------|---------------------|
| Residential (Units) | 2,121 | 7,651 |
| Residential (Value) | \$481,991,392 | \$205,500,000 |
| Commercial (Value) | \$688,796,315 | \$523,200,000 |
| Public/Institutional (Value) | \$202,908,093 | \$278,370,000 |
| Industrial | \$2,921,105 | N/A |
| Mixed Use (Value) | N/A | \$808,000,000 |
| Total (Value) | \$1,376,616,905 | \$1,815,070,000 |



METRO Gold Line

| Development Types | Permitted Development | Planned Development |
|------------------------------|-----------------------|---------------------|
| Residential (Units) | 433 | 1,753 |
| Residential (Value) | \$50,678,514 | \$65,000,000 |
| Commercial (Value) | \$113,676,905 | \$4,000,000 |
| Public/Institutional (Value) | \$96,546,518 | \$86,700,000 |
| Industrial | \$0 | N/A |
| Mixed Use (Value) | N/A | \$1,000,000,000 |
| Total (Value) | \$260,901,937 | \$1,155,700,000 |

