



Development Trends Along Transit

Regional growth near high frequency
transit in the Twin Cities

2021 Report

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Executive Summary

The Twin Cities continue to grow. According to the Metropolitan Council 2021 Regional Forecast, the region gained 333,000 new residents between 2011 and 2020 and it is expected to gain another 818,000 residents by the year 2050. 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 2020, 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 over \$15 billion in development has been permitted near high frequency transit in the last eighteen years.¹ This includes projects that have been completed

since being permitted, and ongoing projects. Of that \$15 billion, \$10.1 billion is located within one half mile of an LRT station, \$5.5 billion is located within a half mile of a BRT station, and \$3.8 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% of the development that has been permitted for the region as a whole, on just 3% of the region's land area. The region's planned developments show the potential for an additional 35,200 multifamily units along high frequency transit, and another \$9.5 billion in development value near high frequency transit.

Preliminary analysis of permit data and of local construction data indicate that the region did experience a drop in development activity due to the COVID-19 pandemic. However, early results suggest that development has been recovering relatively quickly, with construction activity increasing in 2021 both in the region generally and in areas served by high frequency transit. In particular, multifamily residential development near high frequency transit has continued to make up a significant share of construction in 2020-2021. Although the full impact of the pandemic remains to be seen, these early data suggest that development is recovering in the region.

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.

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

PERMITTED Development Highlights:

- \$15 billion in development has been permitted along high frequency transit. This represents 35% of regional development.
 - \$10.1 billion near LRT stations
 - \$5.5 billion near BRT stations
 - \$3.8 billion near high frequency local bus
- 39,200 multifamily units have been permitted near high frequency transit. This represents 39% of multifamily units in the region.
 - 23,755 units near LRT stations
 - 15,600 units near BRT stations
 - 11,700 units near high frequency local bus
- 35% of regional development has occurred along high frequency transit.
 - 41% multifamily development
 - 39% commercial development
 - 28% public and institutional development
 - 7% industrial development

PLANNED Development Highlights:

- \$9.5 billion in development is planned along high frequency transit. This represents 67% of the development planned in the region.
 - \$6.1 billion near LRT stations
 - \$5.4 billion near BRT stations
- 35,200 multifamily units along high frequency transit. This represents 45% of the units planned in the region.
 - 20,000 multifamily units near LRT stations
 - 17,000 multifamily units near BRT stations
 - 56% of multifamily units as part of a mixed-use development
- Nearly 52% of planned development in the region is mixed use.
 - 74% near high frequency transit

Preliminary COVID-19 Impact Analysis

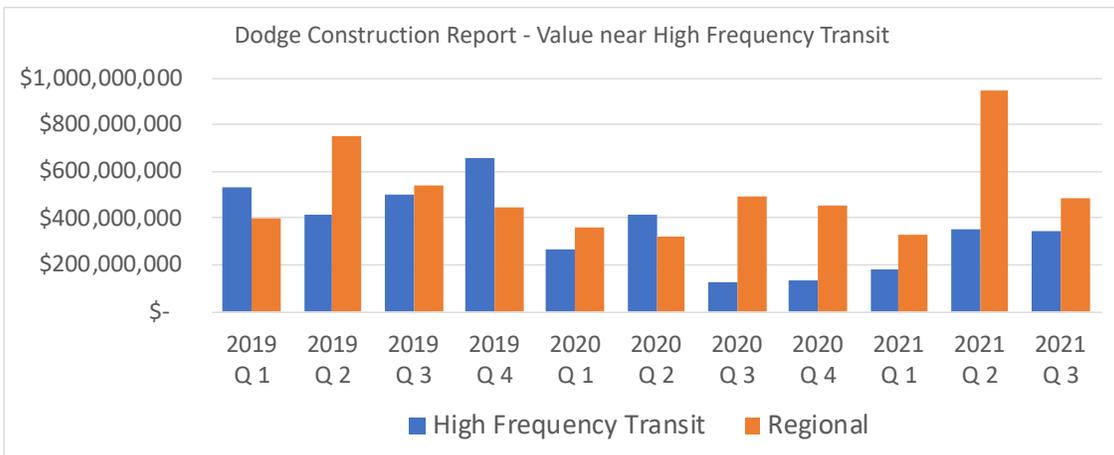
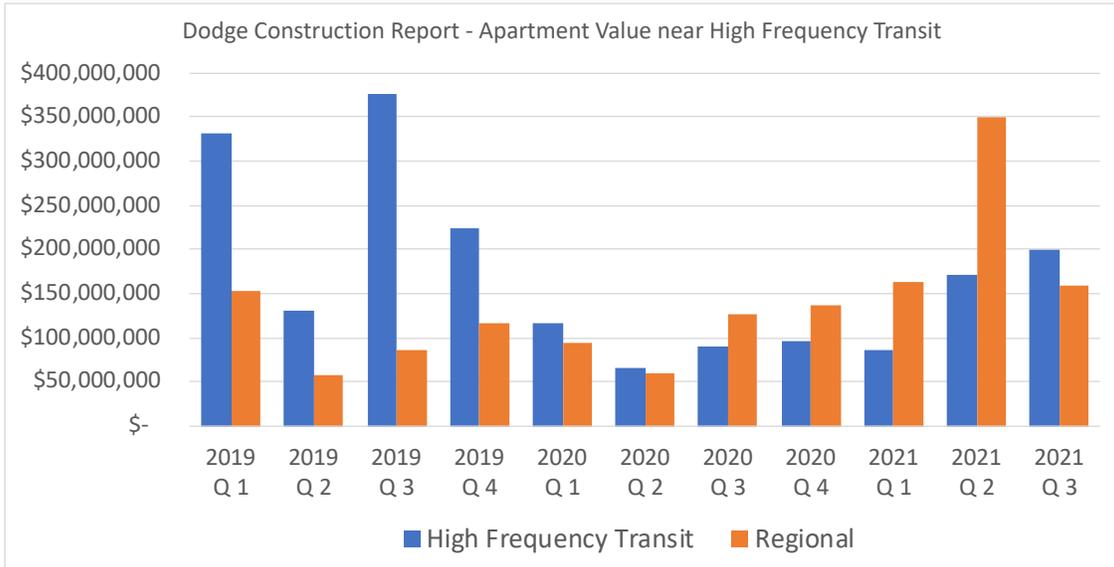
To perform a preliminary impact analysis of the COVID-19 pandemic on regional development trends, this report examined both standard permit data and construction data from Dodge Reports. Given that the COVID-19 pandemic began to cause shutdowns in the Twin Cities region around March 2020, this preliminary analysis includes data from 2019 to establish prior context to any potential pandemic impacts.

Permitted development value fell in 2020, both near high frequency transit (down 33%) and in the region generally (down 19%). Construction data supports this decline, but also suggests some recovery in quarter two of 2020 and more significant recovery in 2021.

As shown below, construction values for “Apartments” dropped in quarter two of 2020 but began to trend

upwards from Q3 2020 to Q3 2021. Apartment value constructed near high frequency transit in 2019 represented 72% of the construction value for the region; though the share of apartment value near high frequency transit dropped in 2020 and 2021, the share remained above 40%. This could indicate that multifamily residential development near high frequency transit has been more resilient through the pandemic, or it could indicate underlying regional trends towards transit oriented development.

While neither permit data nor construction data are adequate to fully understand the impact of the pandemic on development in the Twin Cities, these preliminary trends are promising.



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. Inclusion as a qualifying transitway was not impacted by any COVID-19 related service changes.

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, airports, and other public works projects.

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. For developments occurring in the later half of 2020, it is assumed that projects would have begun prior to the announcement and thus with the original alignment in mind.

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	2020
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 \$43 billion in permitted development value since 2003, with nearly \$16 billion in permit value for commercial developments alone. Over the same period, over \$15 billion has been permitted near high frequency transit, representing 35% of the region's development value on just 3% of the region's land. Development value for the region as a whole has been increasing, although first the 2008 recession and then the beginning of the COVID-19 pandemic in 2020 resulted in slowed development. 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 2020, permits worth \$1.2 billion were issued for developments near transit (30% of regional development). Within transit corridors, 67% of the permitted value for developments is occurring near LRT stations, including over 23,700 multifamily residential units. Although this report does suggest a drop in development during 2020, presumably due to the COVID-19 pandemic, investment in development has still been increasing since 2003 – the permit data suggest that the permit value near high frequency transit has been increasing at a faster rate year-over-year than the region generally.

PERMITTED Development Highlights:

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 - \$10.1 billion near LRT stations
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 - \$3.8 billion near high frequency local bus
- 39,200 multifamily units have been permitted near high frequency transit. This represents 39% of multifamily units in the region.
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 - 28% public and institutional development
 - 7% industrial development



Multifamily Residential

From a high of \$1.2 billion in 2019, development value near high frequency transit dropped to \$715 million in 2020, representing 32% of the region's multifamily development value. 2019 also brought a high of 6,500 units to the region, while 4,800 units were added near high frequency transit in 2020. Multifamily development near LRT and BRT slowed in 2020, while high frequency local bus routes actually added more units in 2020 than in 2019. However, even with a decline in 2020, the share multifamily development value near high frequency transit has continued to grow since the beginning of residential permit data in 2009.

Since 2009 nearly 40,000 multifamily units and \$6.1 billion in permit value has been located near high frequency transit. This represents 42% of the multifamily development that has occurred in the region over that

time. In other words, over 40% of multifamily development has occurred on just the 3% of regional acreage served by high frequency transit.

99% 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 \$6 billion in permit value between 2009 and 2020, with townhomes carrying the next highest total permit value at over \$28 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.



Table 1: Permitted Multifamily 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	28.9%	28.0%
2011	1,400	\$123,580,901	34.2%	38.5%
2012	4,625	\$511,893,249	59.0%	62.0%
2013	3,629	\$608,217,713	46.0%	50.2%
2014	1,959	\$277,291,061	30.5%	32.5%
2015	3,360	\$566,979,633	42.4%	46.0%
2016	3,375	\$587,405,883	37.3%	41.9%
2017	3,801	\$573,663,158	36.5%	39.6%
2018	4,412	\$856,832,833	37.0%	41.3%
2019	6,364	\$1,138,176,002	43.0%	43.1%
2020	4,778	\$714,799,605	33.9%	31.6%
Total	39,197	\$6,114,774,338	39.2%	41.2%

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

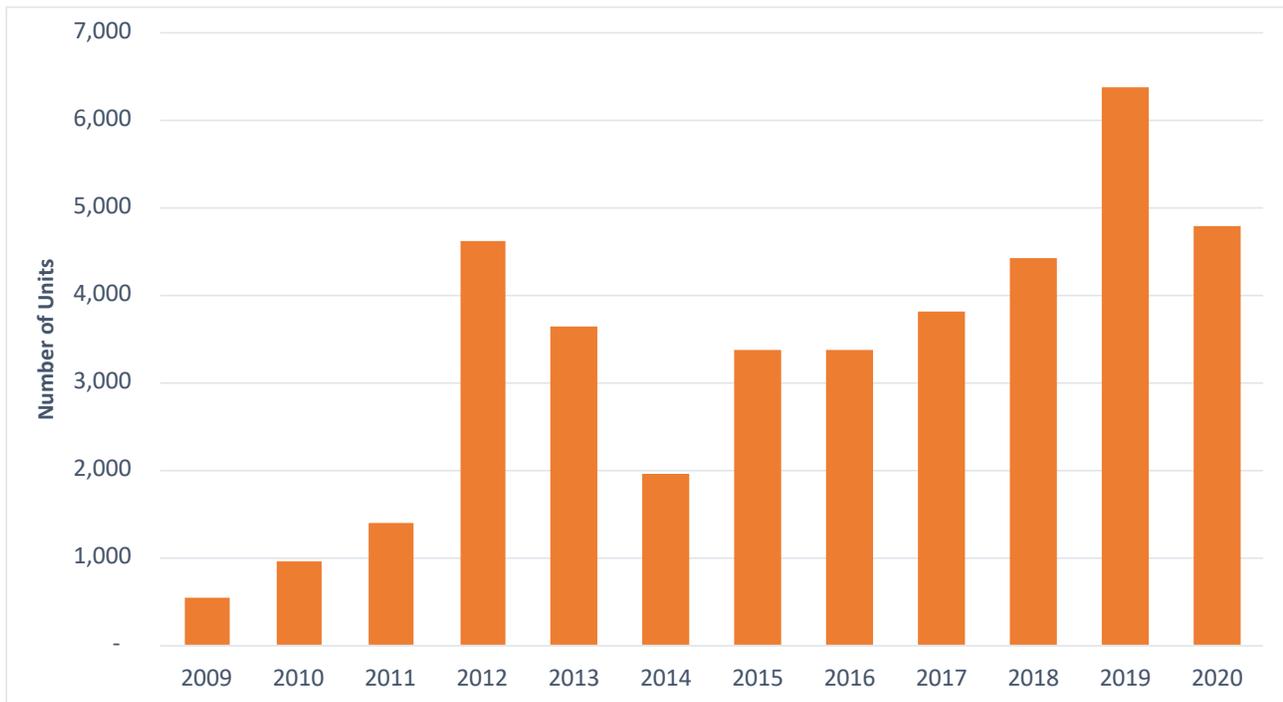


Chart 3: Permitted Multifamily near High Frequency Transit by Permit Value yearly total

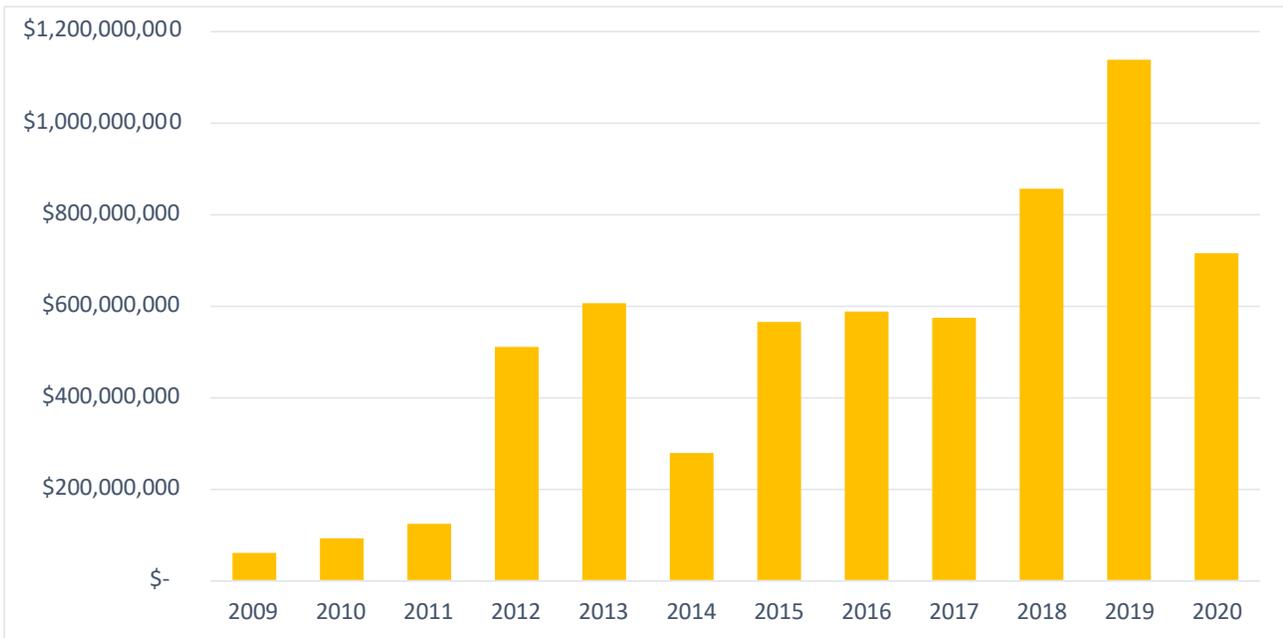
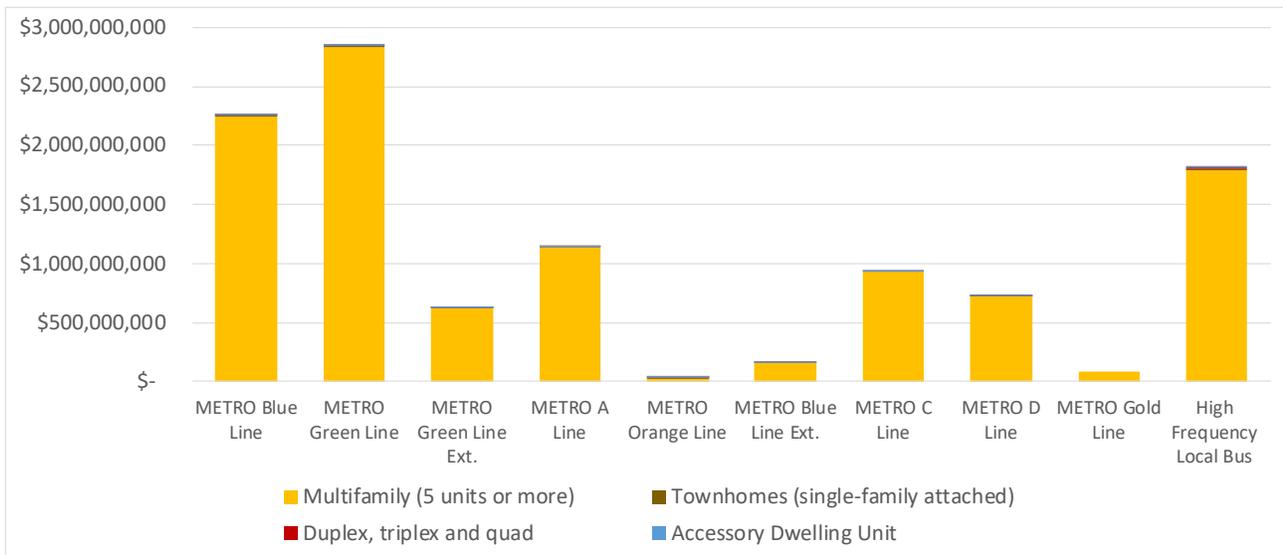
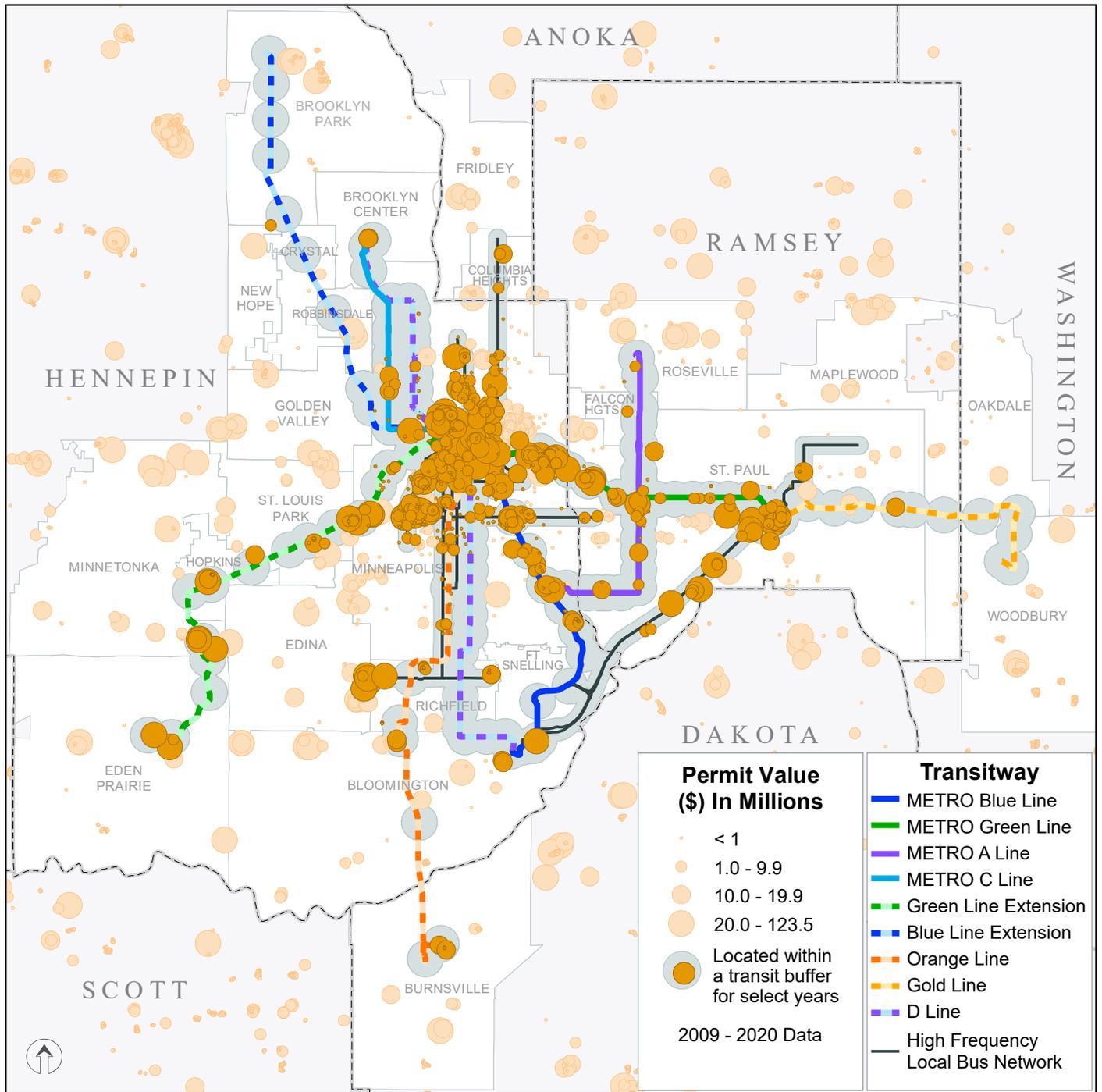


Chart 4: Permitted Multifamily Units near High Frequency Transit by Type and Transit Route⁴



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 established LRT lines (the Green Line and Blue Line) and newer transitways, like the Green Line Extension LRT and the METRO C Line.

Commercial

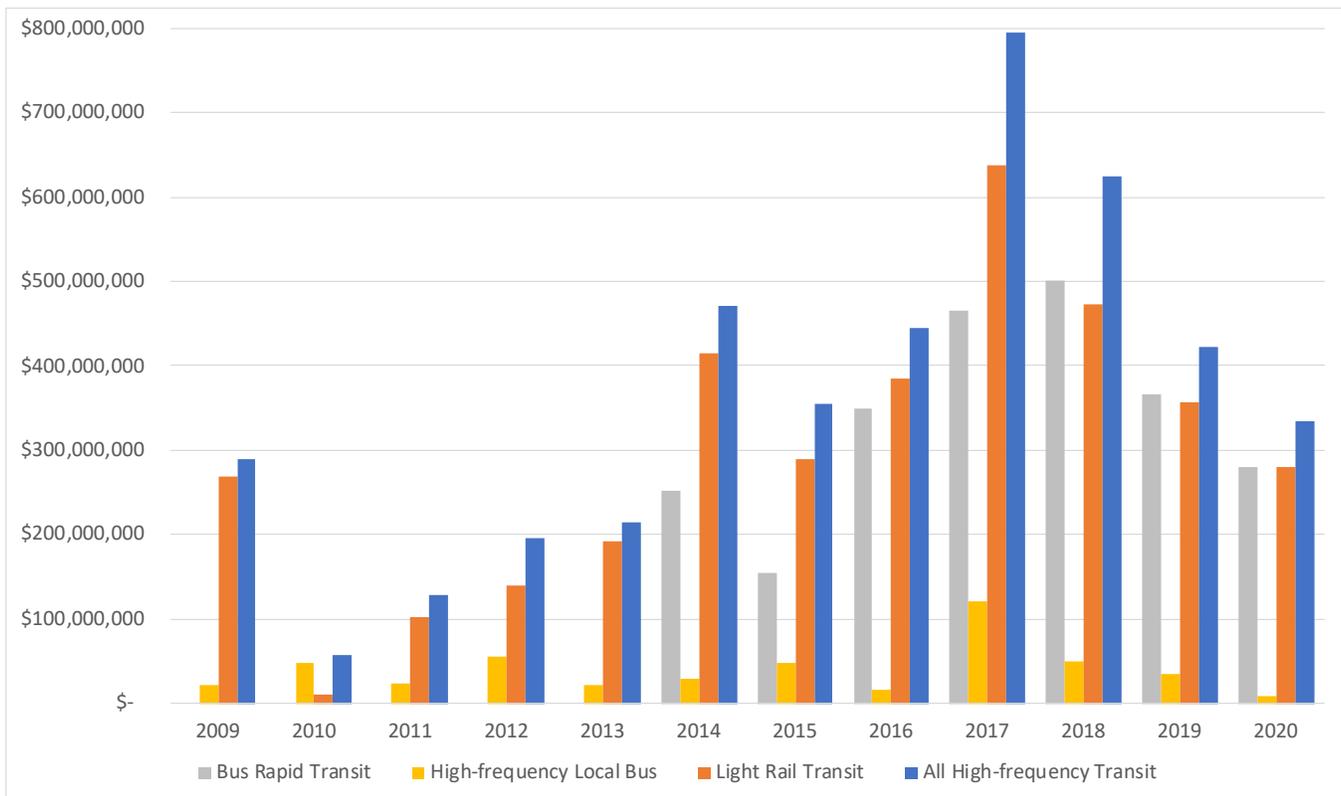
In 2020, regional commercial development value continued a recent negative trend, with commercial permit value declining throughout the region since 2017. Commercial permit value near high frequency transit mirrored the regional trend, with 2020 hitting \$334 million. However, commercial development near high frequency transitways represented 48% of the region’s commercial value, indicating that the market near high frequency transit was perhaps more resilient through the first year of the COVID-19 pandemic.

Nearly \$6.3 billion in commercial development has occurred within areas served by high frequency transit since 2003, a total which represents 39% of the region’s total permit value for commercial development. 30% of the region’s commercial development by permit value has occurred near LRT lines, with over \$3.6 billion each in permit value attributed to the Blue Line and the Green Line. The Orange Line has seen \$1.6 billion in development since the tracking

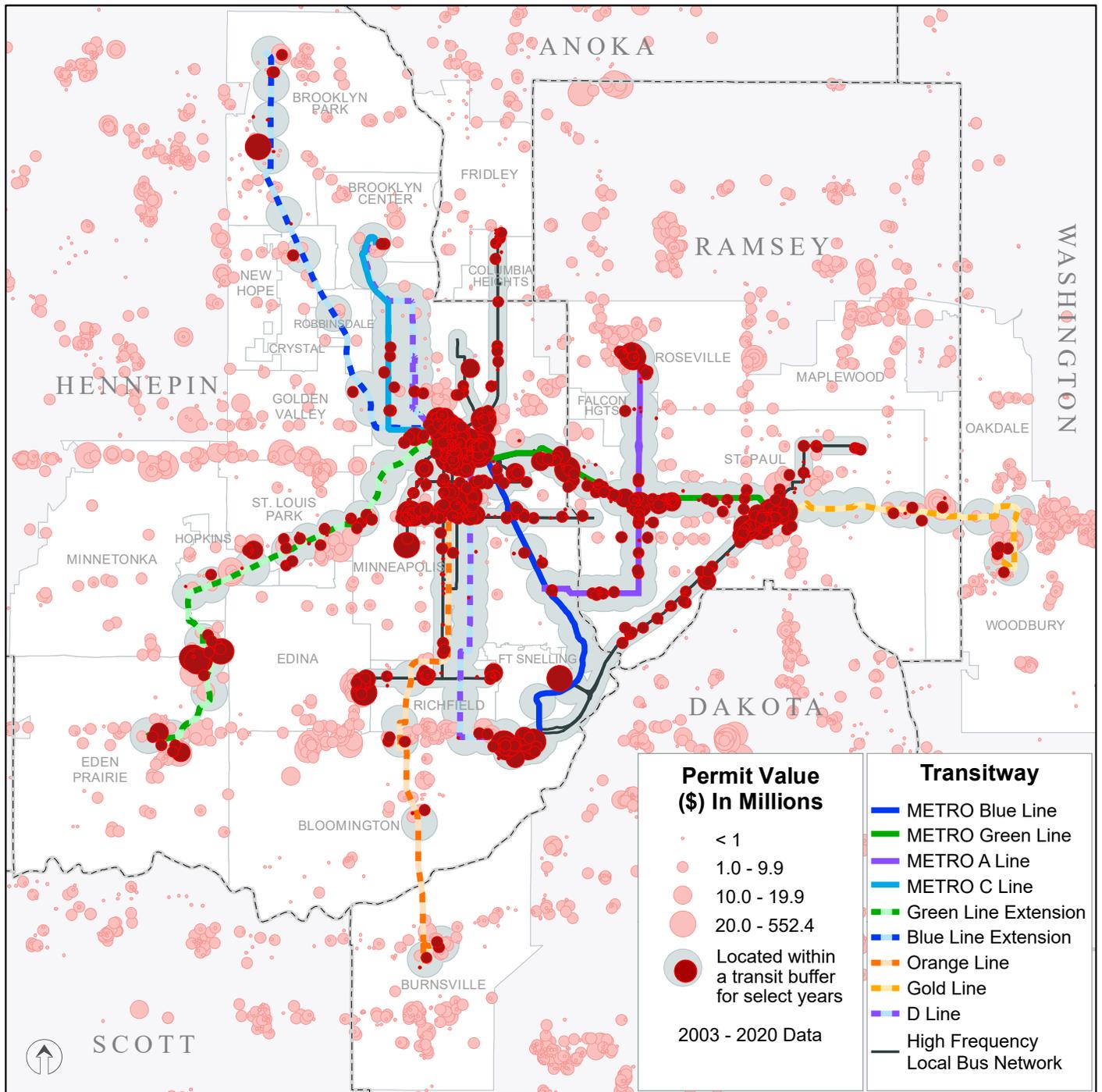
began in 2014, while the C line has seen \$1.4 billion in permit value since 2016. Thus, although commercial development in the region generally has fallen since a peak in 2017, the share of commercial development near high frequency transit remains consistently near or above 40%.

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 the 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 possibilities for the expansion of the high frequency transit system.

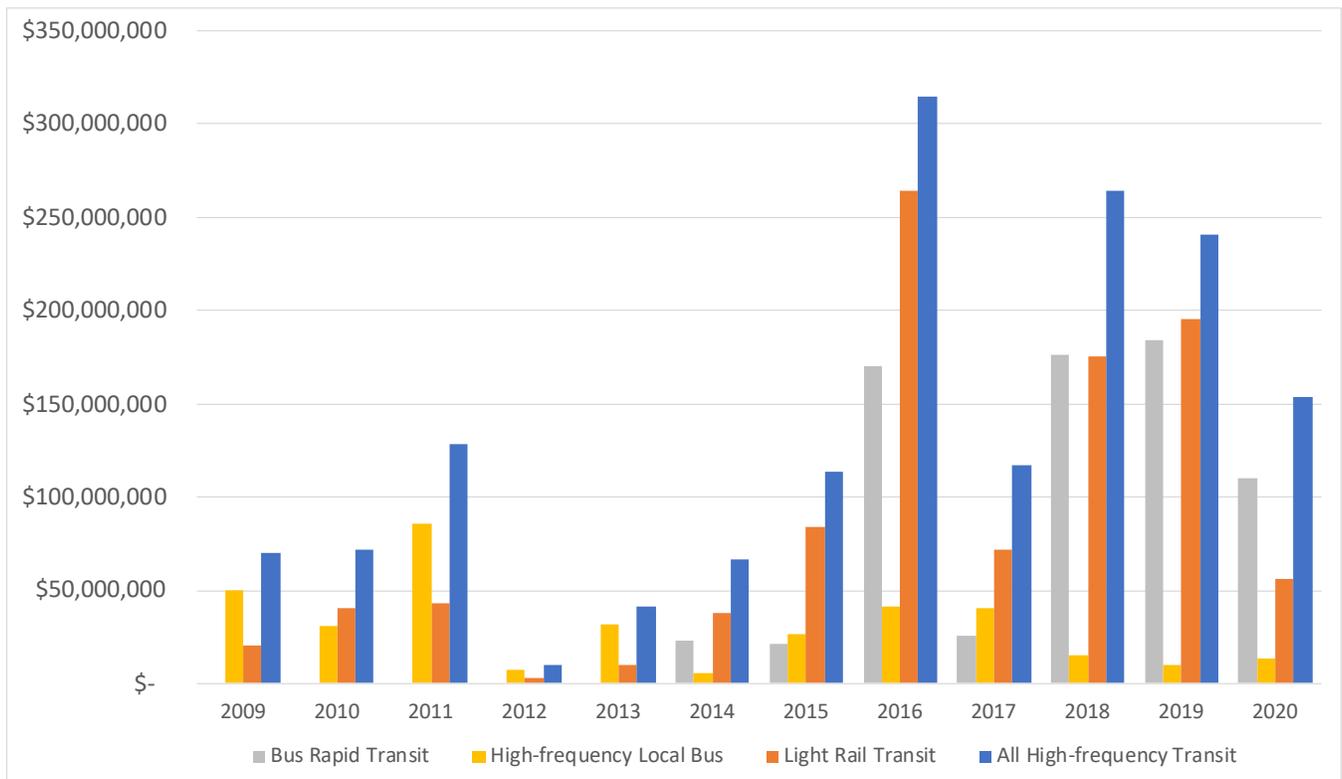
Public and Institutional

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.

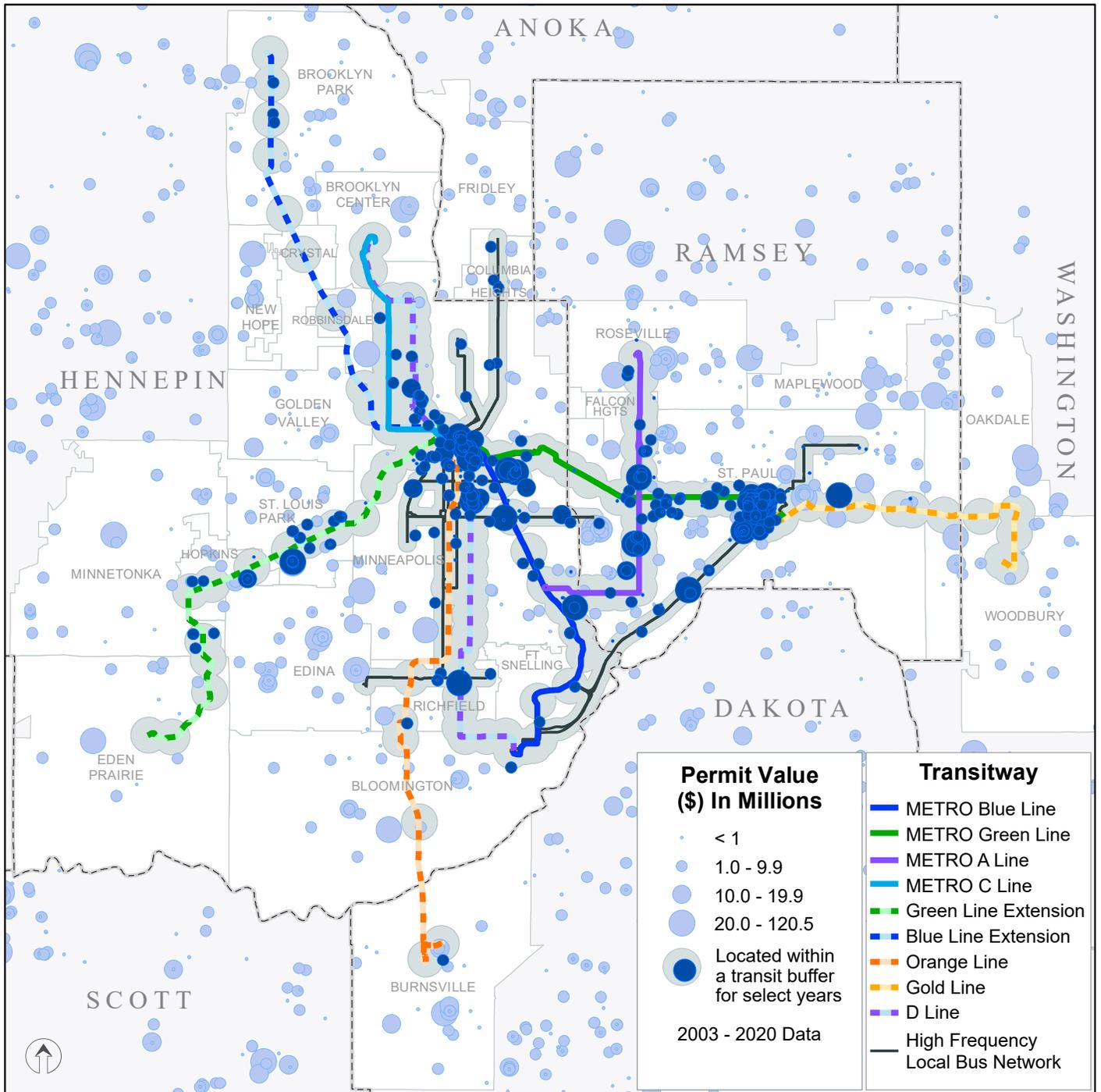
Over 28% of the region's public and institutional development has occurred near high frequency transit

since 2003, with over \$2.3 billion in permit 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 displayed an annual growth rate of 21% since 2003, more than double the 8% annual growth rate of public and institutional development regionally.

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.

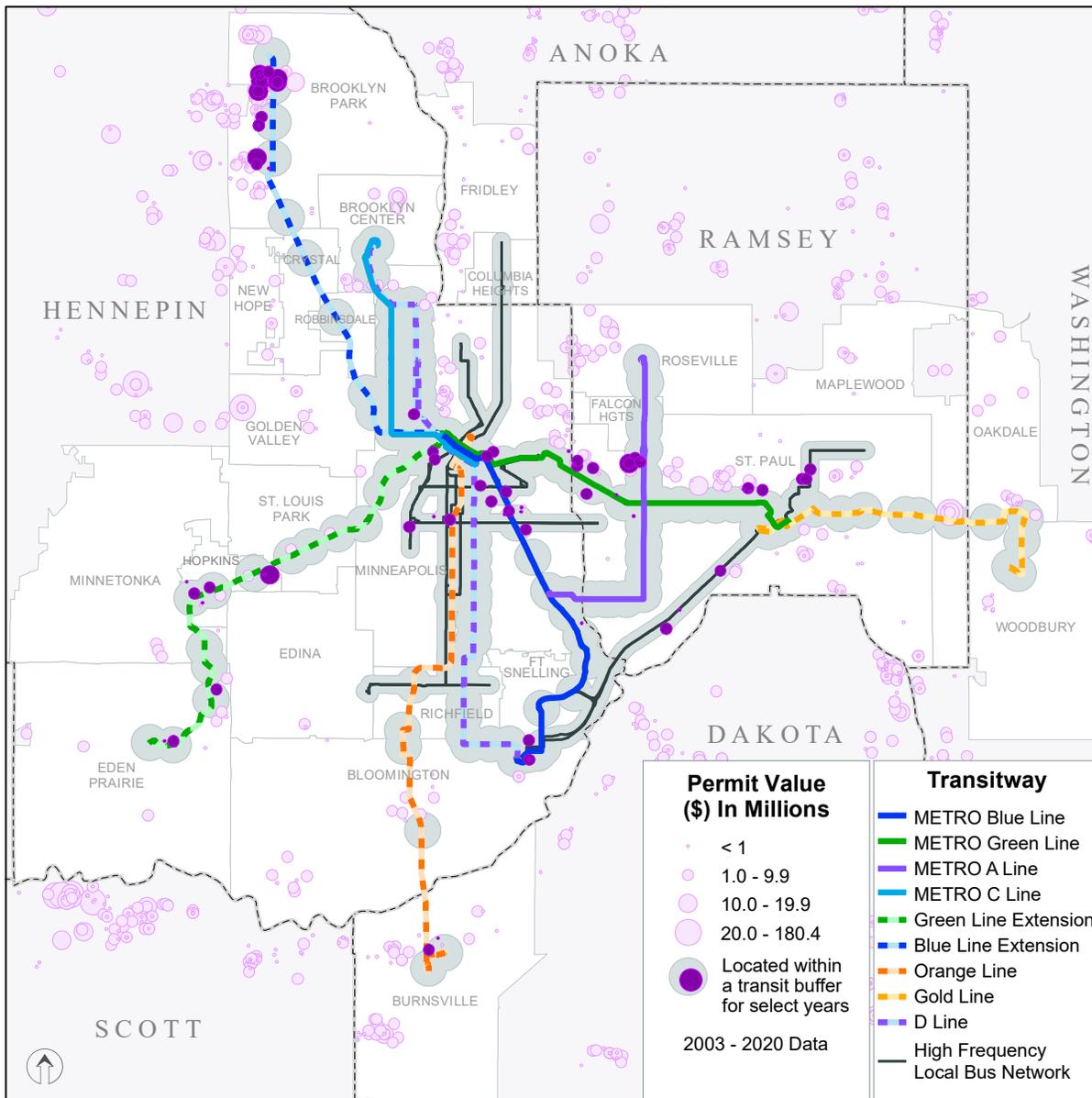
Industrial

In 2019, the share of industrial development near high frequency transit dropped steeply, from 12% to 5%, ending a five-year period of growth near high frequency transit lines. In 2020, the share of industrial development near high frequency transit rose to 6.5%, close to the 7% average share seen since 2003.

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 generally increased steadily. However, it is notable that there were no permits issued in 2020 for industrial development in buffers near the original Blue Line Extension route – this might indicate a pause in development while the Council revisits the alignment or a general shift in development. Given previous interest in industrial development along the Blue Line Extension, hopefully development near the transitway will continue once a new alignment is finalized.

Map 4: Industrial Development near High Frequency Transit



Map 4 shows high value investments in industrial developments occurring near the Blue Line Extension and the Green Line Extension. Although the Metropolitan Council is in the process of revisiting the route for the Blue Line Extension, it is assumed that the northern station areas will remain relatively similar – recent investments in this area will therefore likely still benefit from the final alignment.

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

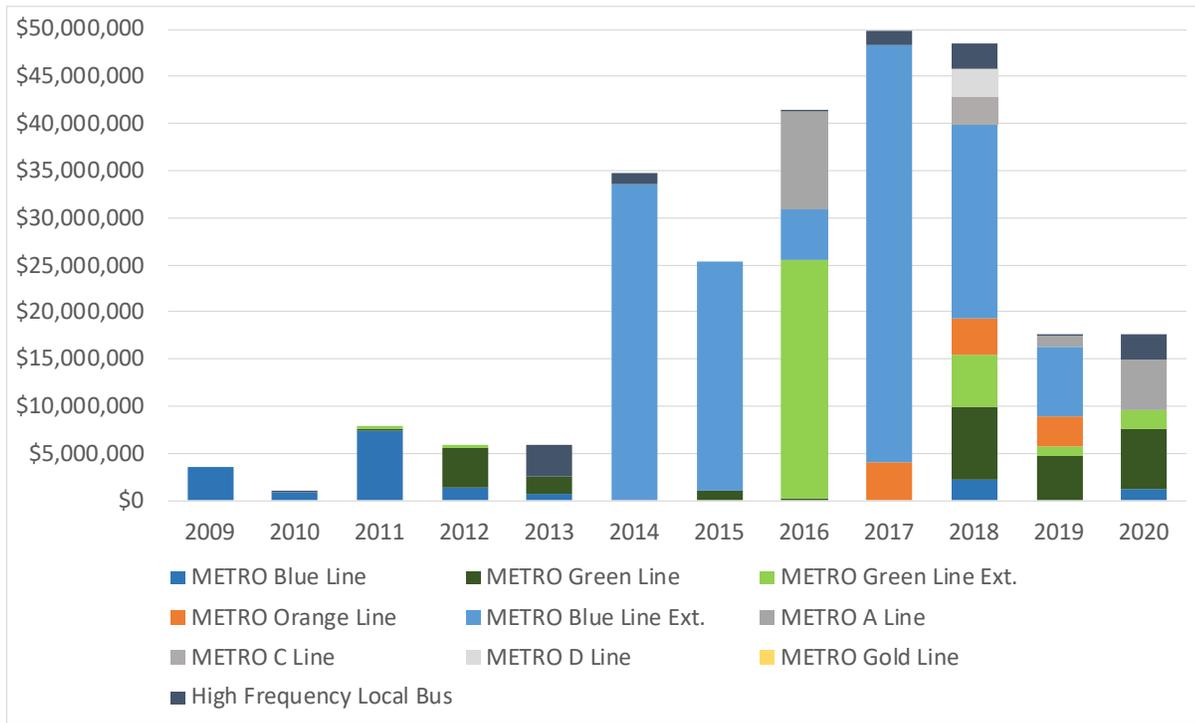
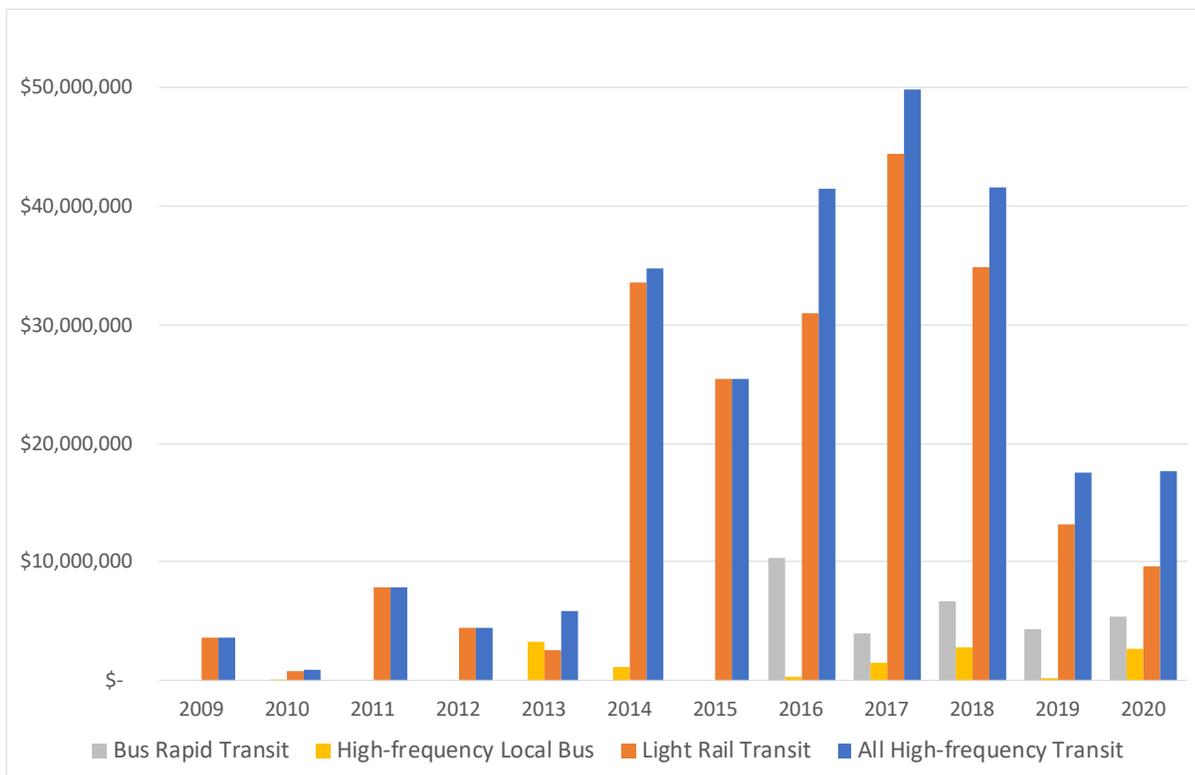


Chart 8: Industrial Permit Value near High Frequency Transit by Year



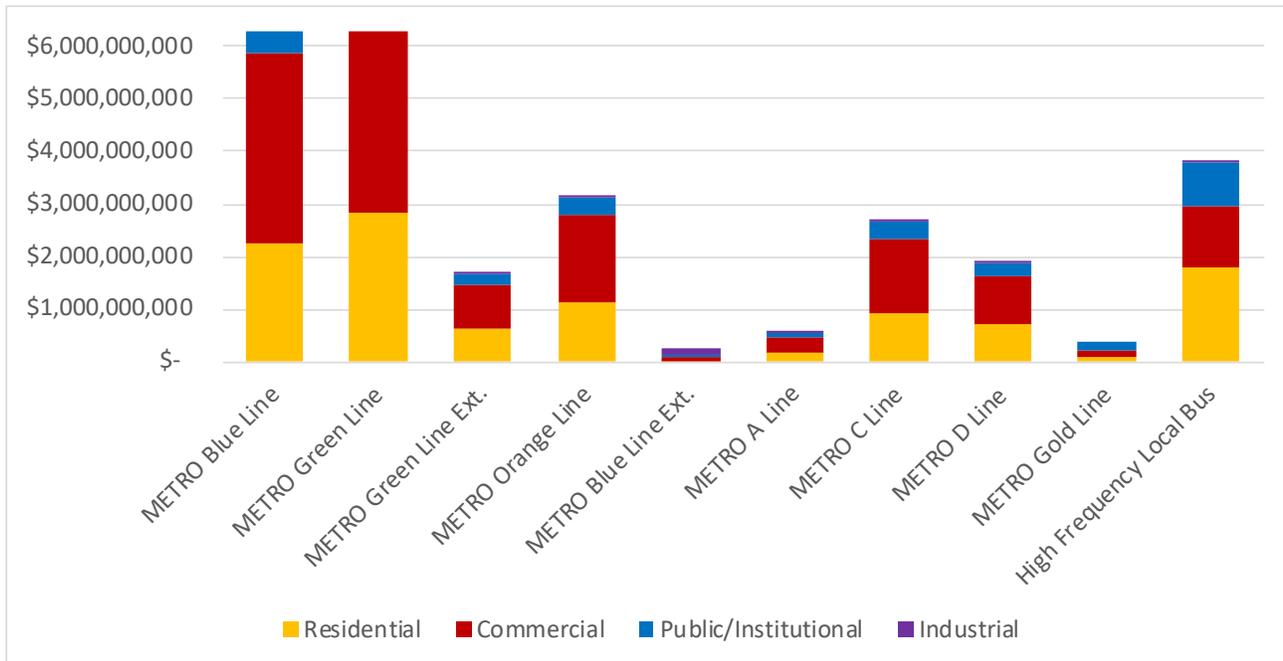
5 Due to the nature of the data, permits are reported for each relevant line – value may be double-counted and should be used only to indicate share by line.

Permitted Development by Transitway and High Frequency Local Bus

Of the \$15 billion in development being permitted near high frequency transit, 67% is served by LRT, 37% by BRT, and 25% by high frequency local bus. The well-established Blue Line and Green Line LRT serve 43% and 50% of development value within transit respectively. Commercial development makes up the largest share of most Twin Cities high frequency transit development (38%), with residential a close second (37%). However, commercial transit lines which are operational have generated the most permit value, though permit values near high frequency

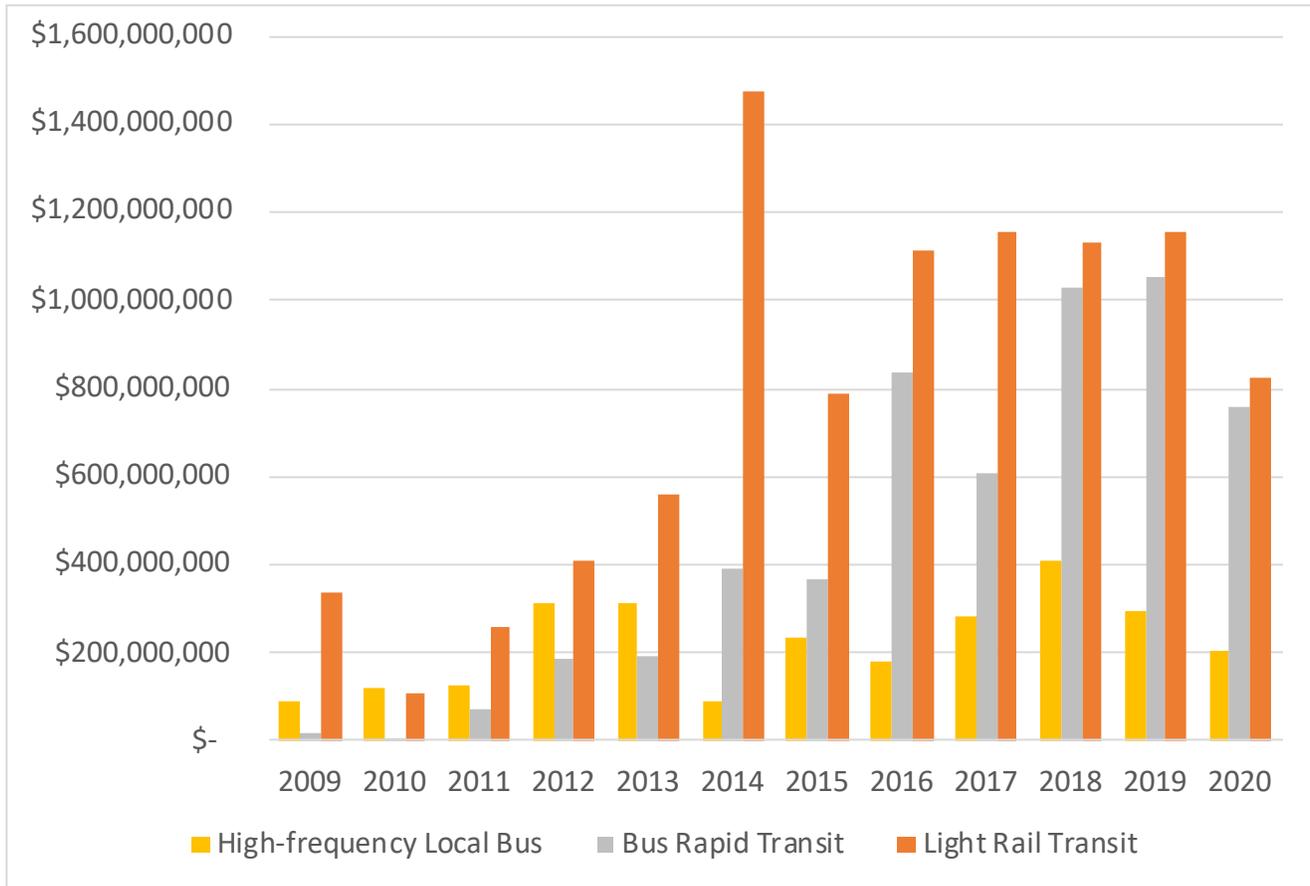
transit have been increasing generally since 2003, as shown in Chart 10. Although most permits have been located near LRT on average, the proportion of permits for projects near BRT has risen steadily, leveling out in 2018 and 2019 at 58% of development near high frequency transit. In 2020, the share of projects near BRT hit a new high of 62%, with 67% of permitted developments near high frequency transit located near LRT.

Chart 9: Permitted Development Value by Transitway (Residential 2009-2020; Commercial, Public/Institutional, Industrial 2003-2020)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 Time⁷



⁷ Includes the nearly \$800 million construction of the U.S. Bank Stadium in 2014.

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 has contained 35% of the region's permitted development value since 2003. The areas served by light rail transit alone represent 24% 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 share of development has located near high frequency transit:

- Residential: 41%
- Commercial: 39%
- Public/Institutional: 28%
- Industrial: 7%
- Total: 35%

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. Although the percent of permit value near high frequency transit dropped to 30% in 2020, permit value near high frequency transit has shown a compound annual growth rate of 26% from 2003-2020, outpacing the region generally at 15%.

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. 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.

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

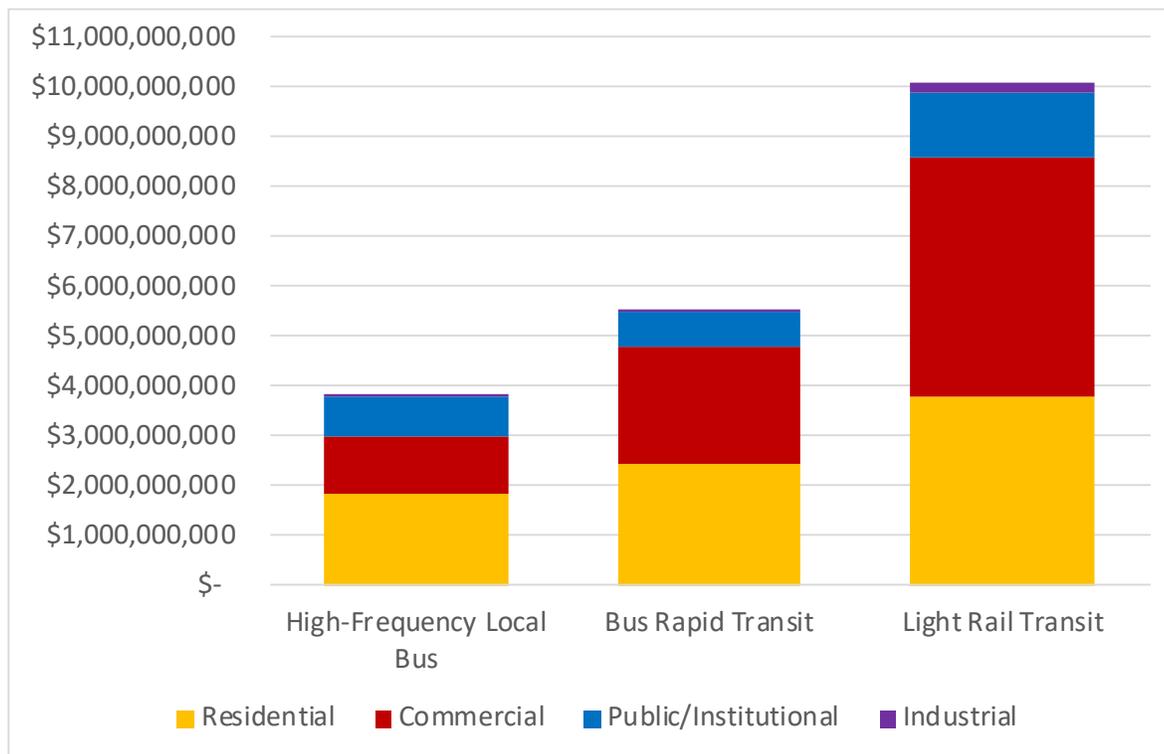


Chart 12: Permitted Development Value occurring near High Frequency Transit over time

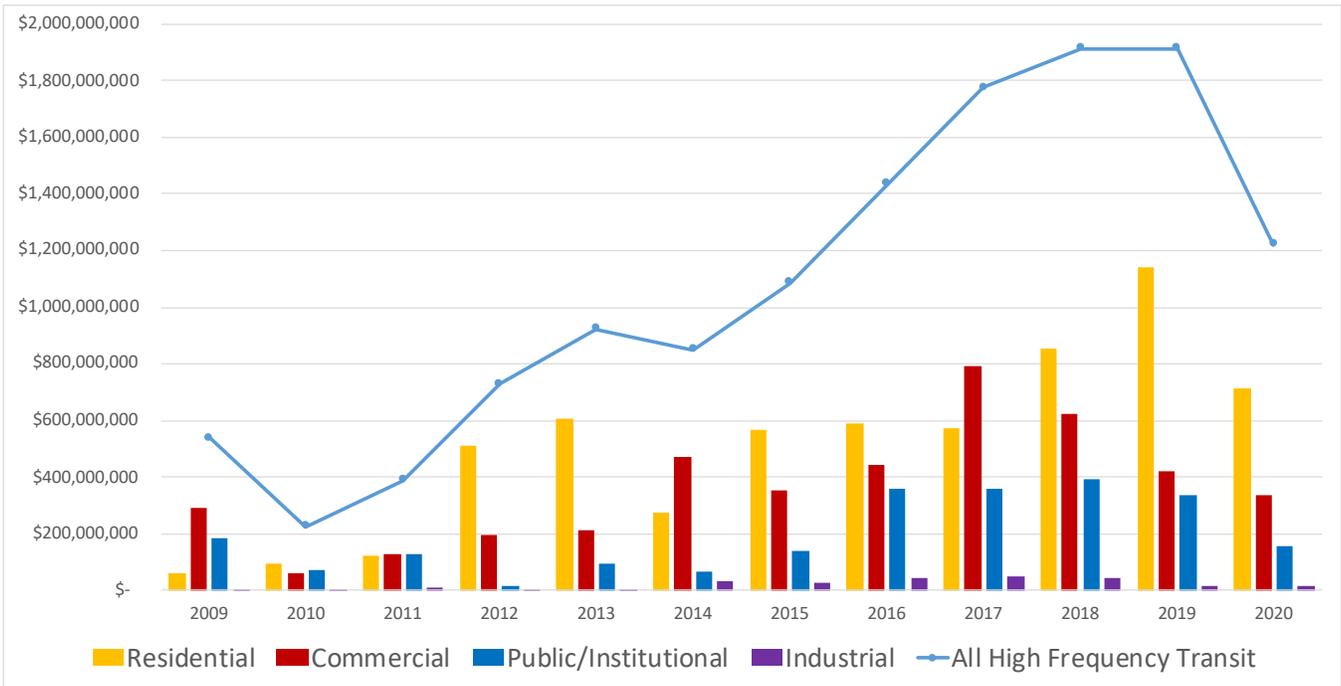


Chart 13: Percentage of Permitted Development near High Frequency Transit (all years)

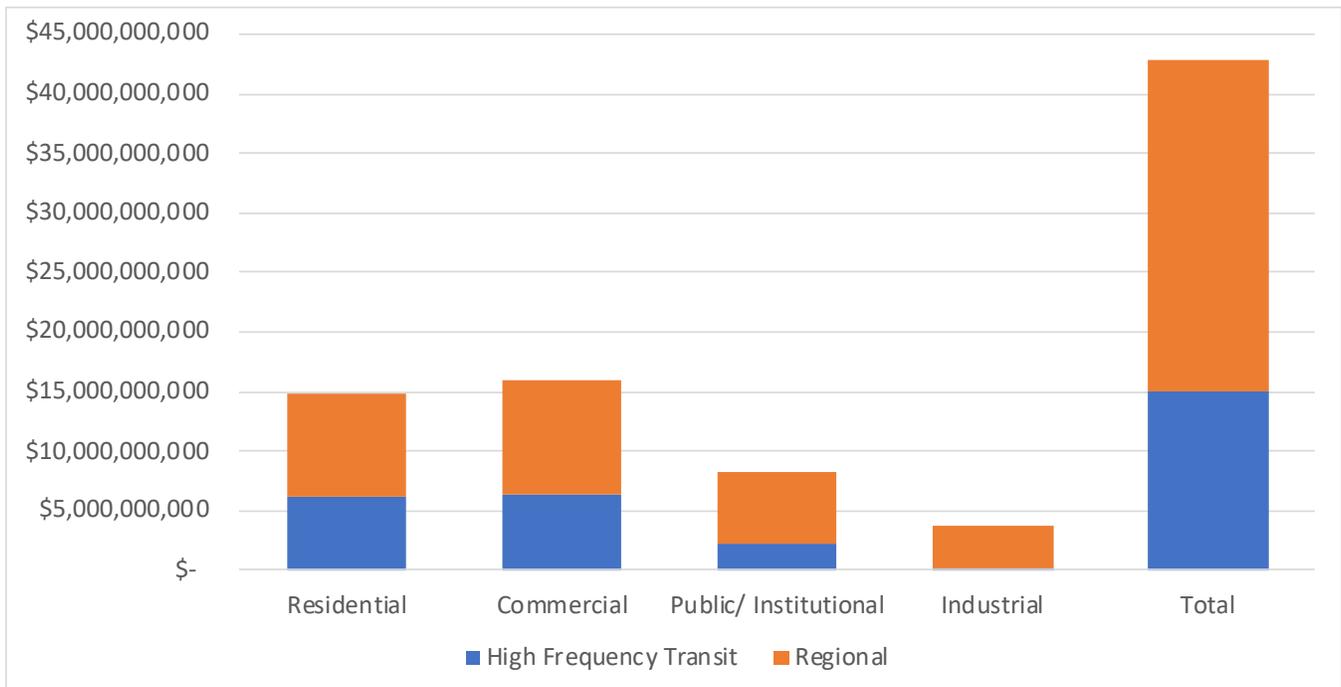
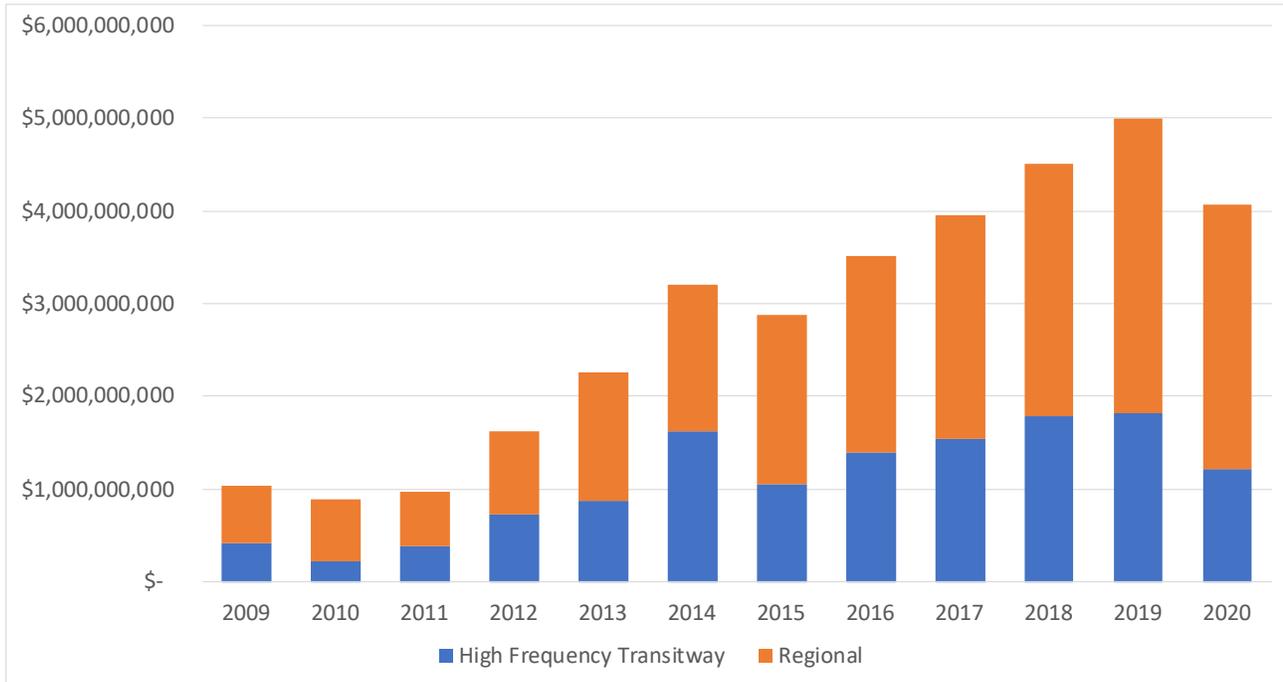


Chart 14: Share of Regional Development Served by High Frequency Transit per year



Planned Development

Over the past decade, development has increasingly located along high frequency transit. From 2003 to 2020, 35% of regional development occurred near high frequency transit. Looking forward, the Council has identified \$9.5 billion in development that have been announced for developments near high frequency transit. This represents 67% of the planned development in the region. Most dramatically, 74% of all mixed-use development (mostly commercial/residential) is planned near high frequency transit.

PLANNED Development Highlights:

- \$9.5 billion in development is planned along high frequency transit. This represents 67% of the development planned in the region.
 - \$6.1 billion in development near LRT stations
 - \$5.4 billion in development near BRT stations
- 35,200 multifamily units are currently planned along high frequency transit. This represents 48% of the units planned in the region.
 - 20,000 units are planned near LRT stations
 - 17,000 units are planned near BRT stations
 - 56% are planned as part of a mixed-use development
- Nearly 52% of planned development in the region is mixed use. 74% of mixed use development is near high frequency transit.



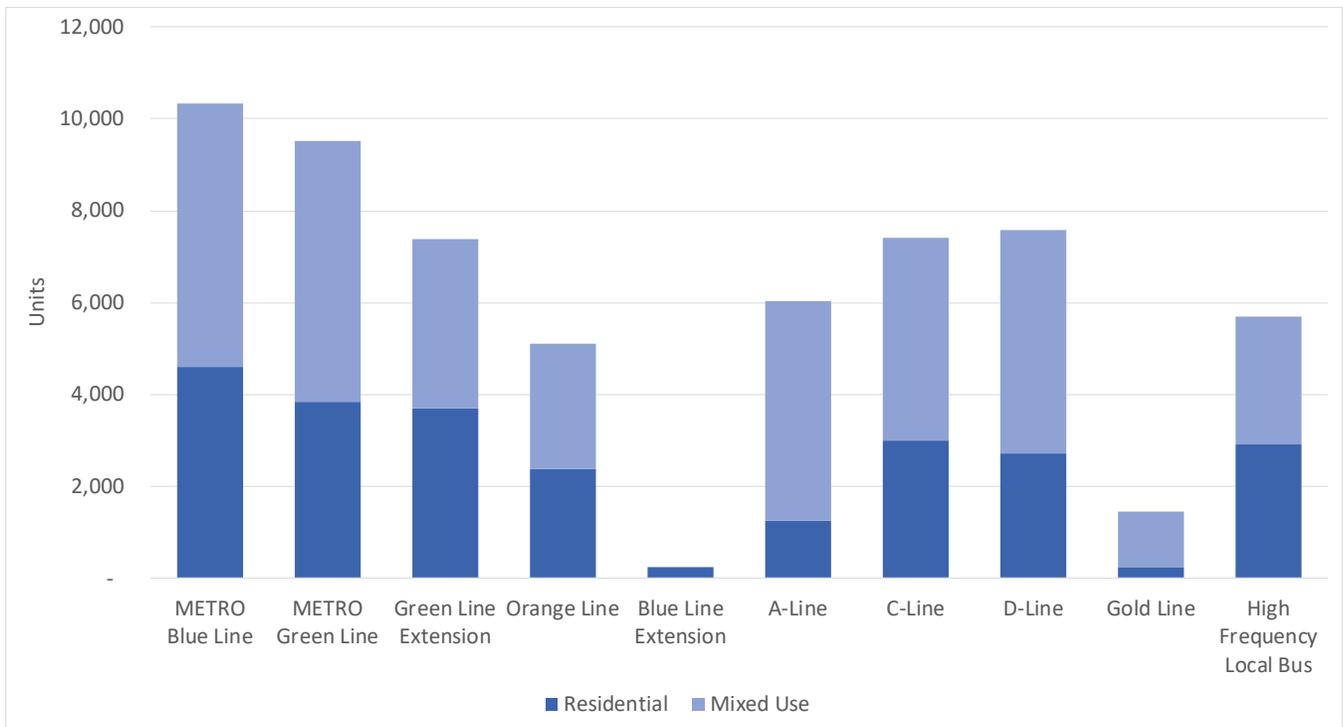
Planned Multifamily Residential

Over 35,000 multifamily units are currently planned along high frequency transit. This represents 45% of the units that are planned for the region. Nearly 20,000 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 (56%). Chart 16 shows the share of announced planned units along high frequency transitways that are part of mixed-use developments.

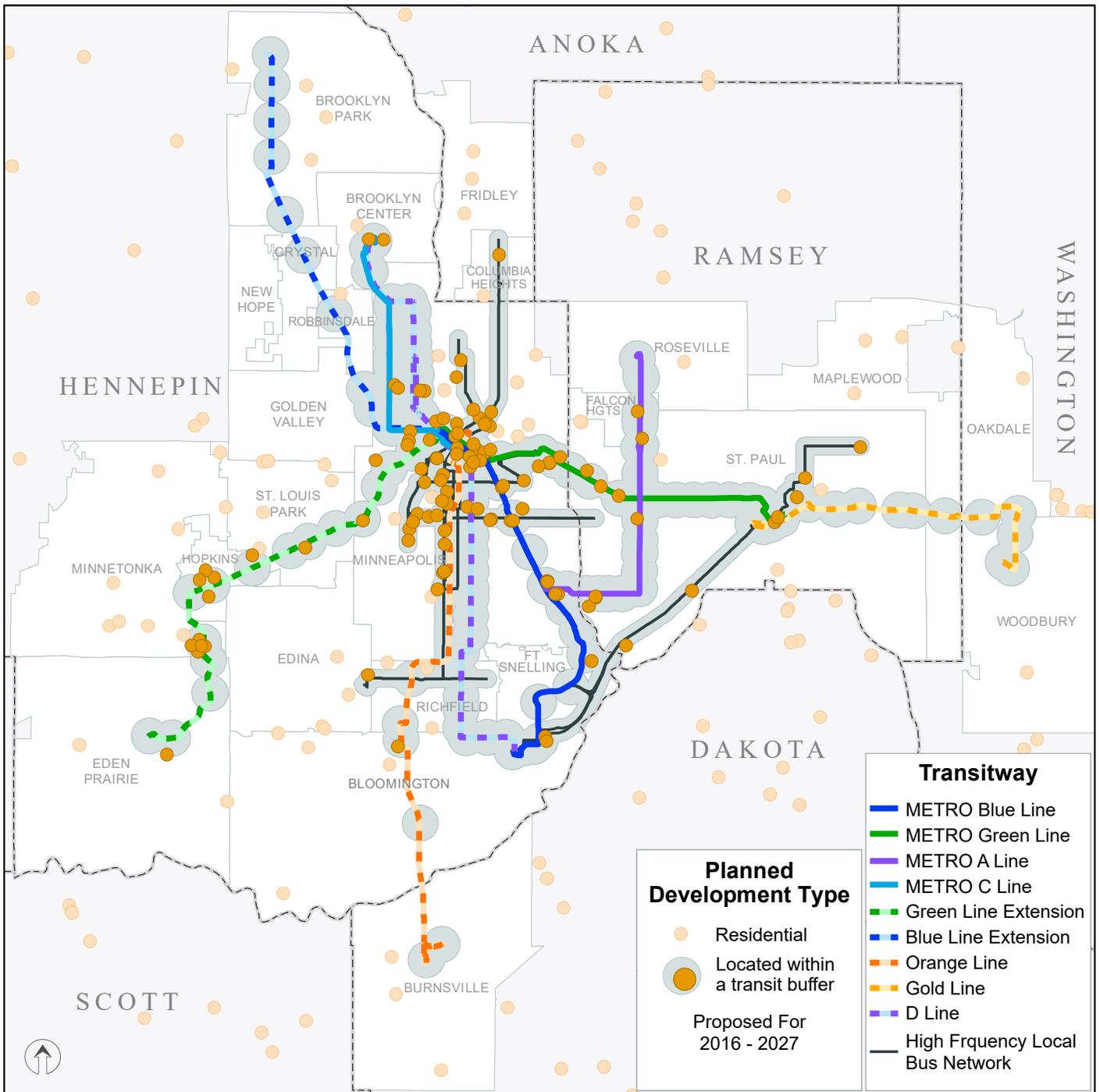
As depicted in the chart below, the Green Line and Blue Line are expected to see the most residential development. However, significant development is also planned along the BRT routes, high frequency local bus routes and the Green Line Extension.

Chart 15: Planned Multifamily Units near High Frequency Transit⁸



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

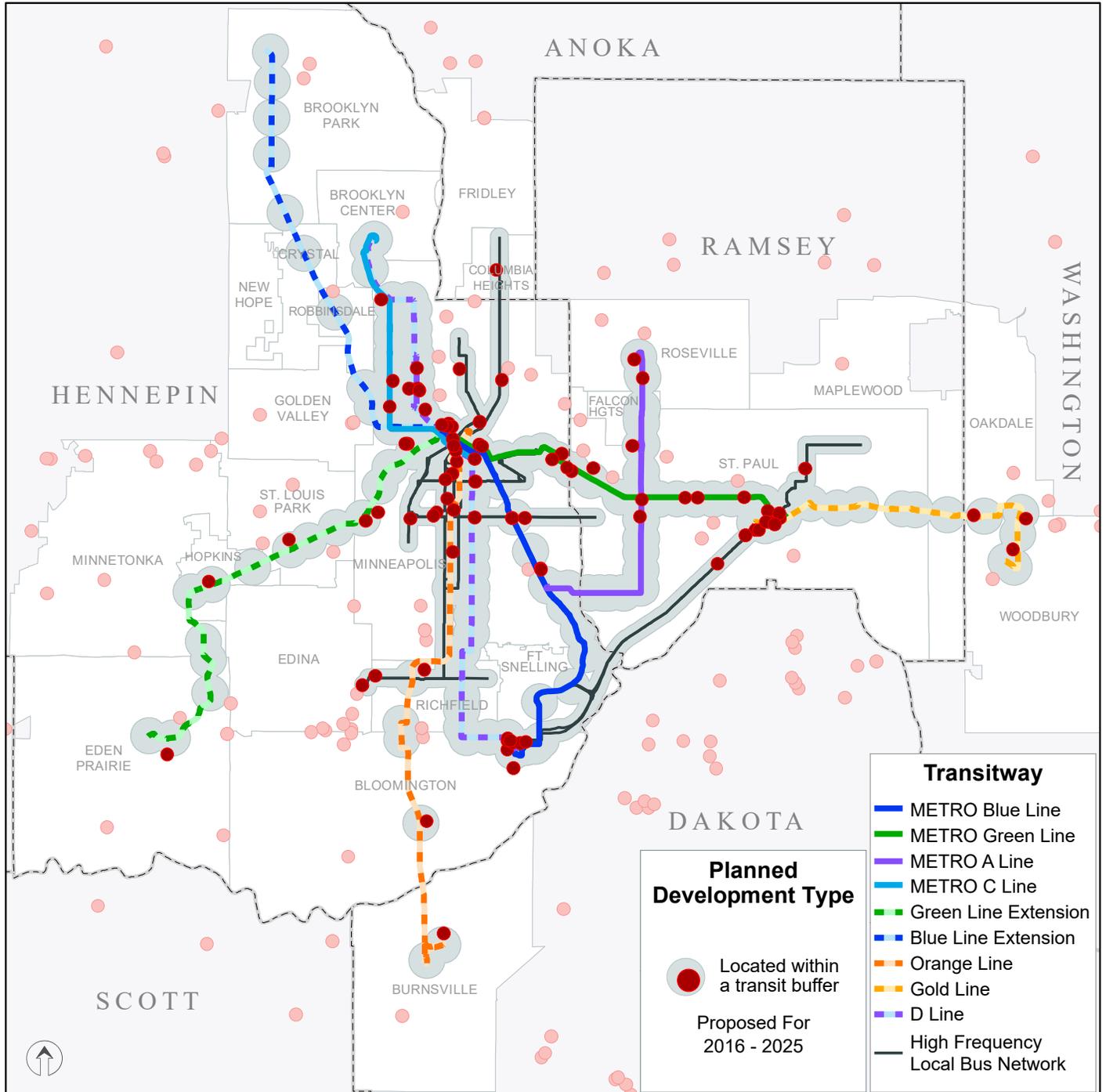
Map 5: Planned Multifamily Development



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, along the new Green Line Extension, and in downtown St. Paul.

Commercial

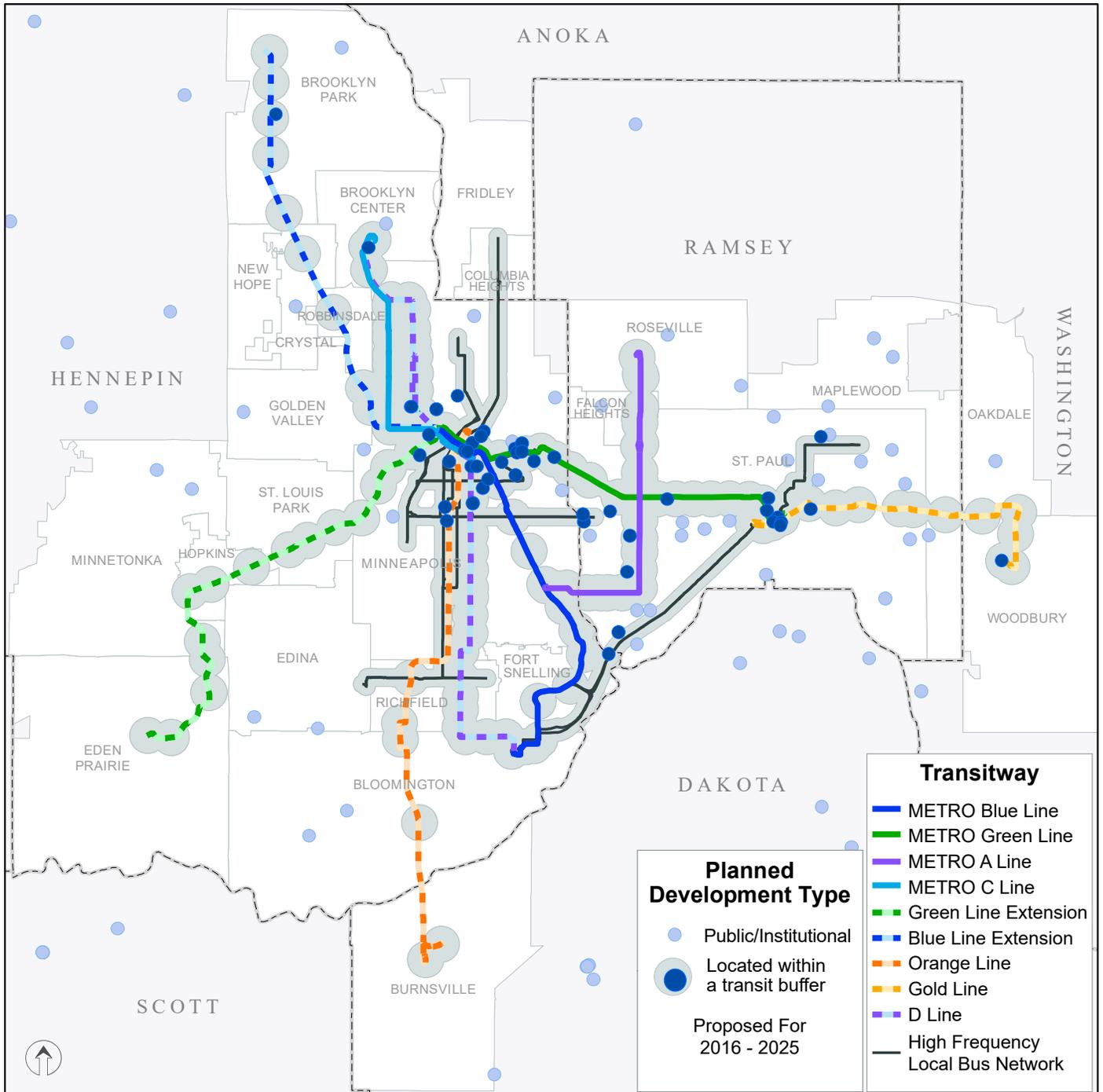
Map 6: Planned Commercial Development



Map 6 shows the locations of planned commercial development across the region. As shown, commercial developments are clustered most intensely around downtown Minneapolis, downtown St. Paul, and in Bloomington around Mall of America.

Public and Institutional

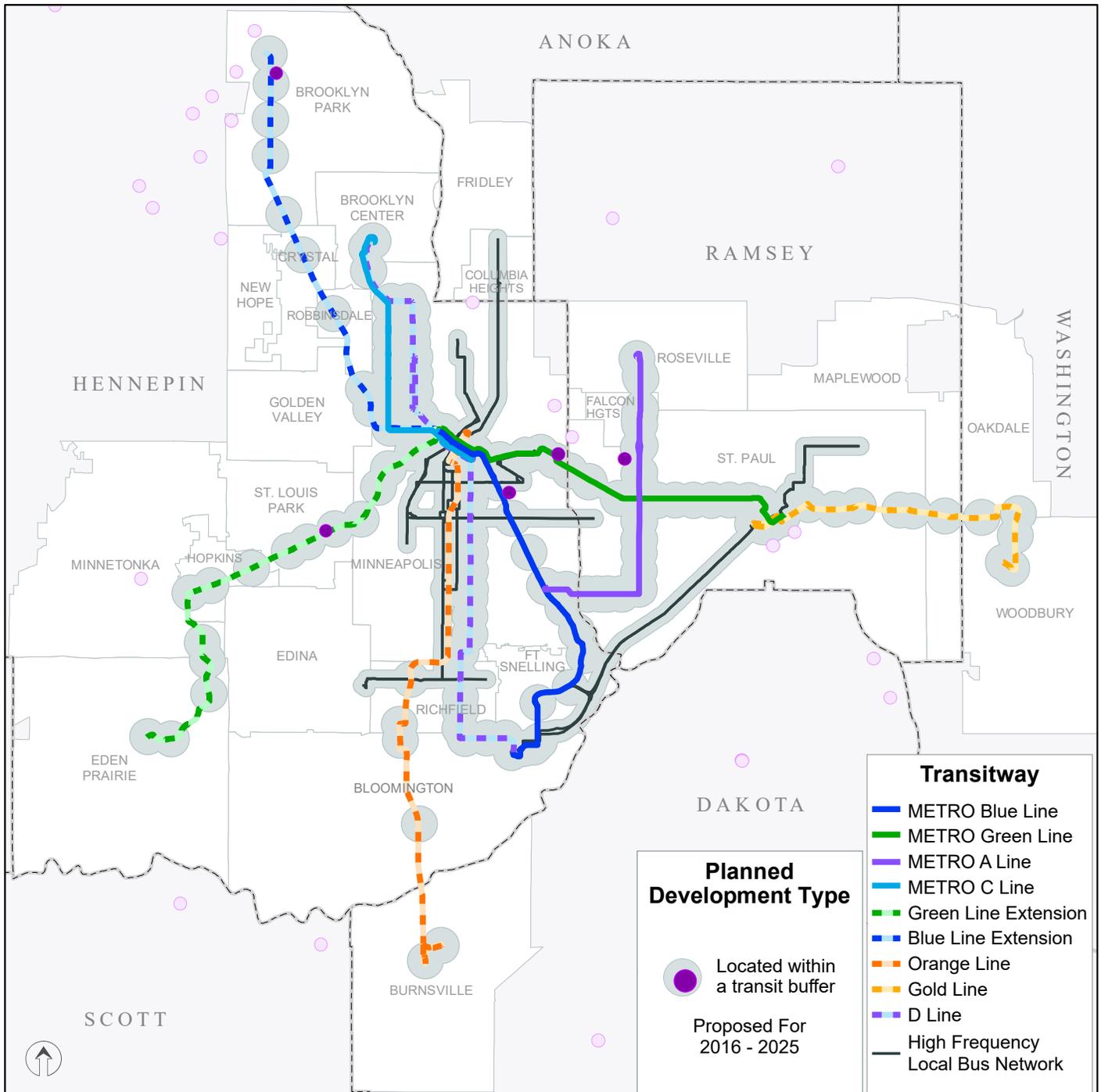
Map 7: Planned Public and Institutional Development



Map 7 shows the locations of planned public and institutional development across the region. Some clustering can be seen near both downtown Minneapolis and downtown St. Paul.

Industrial

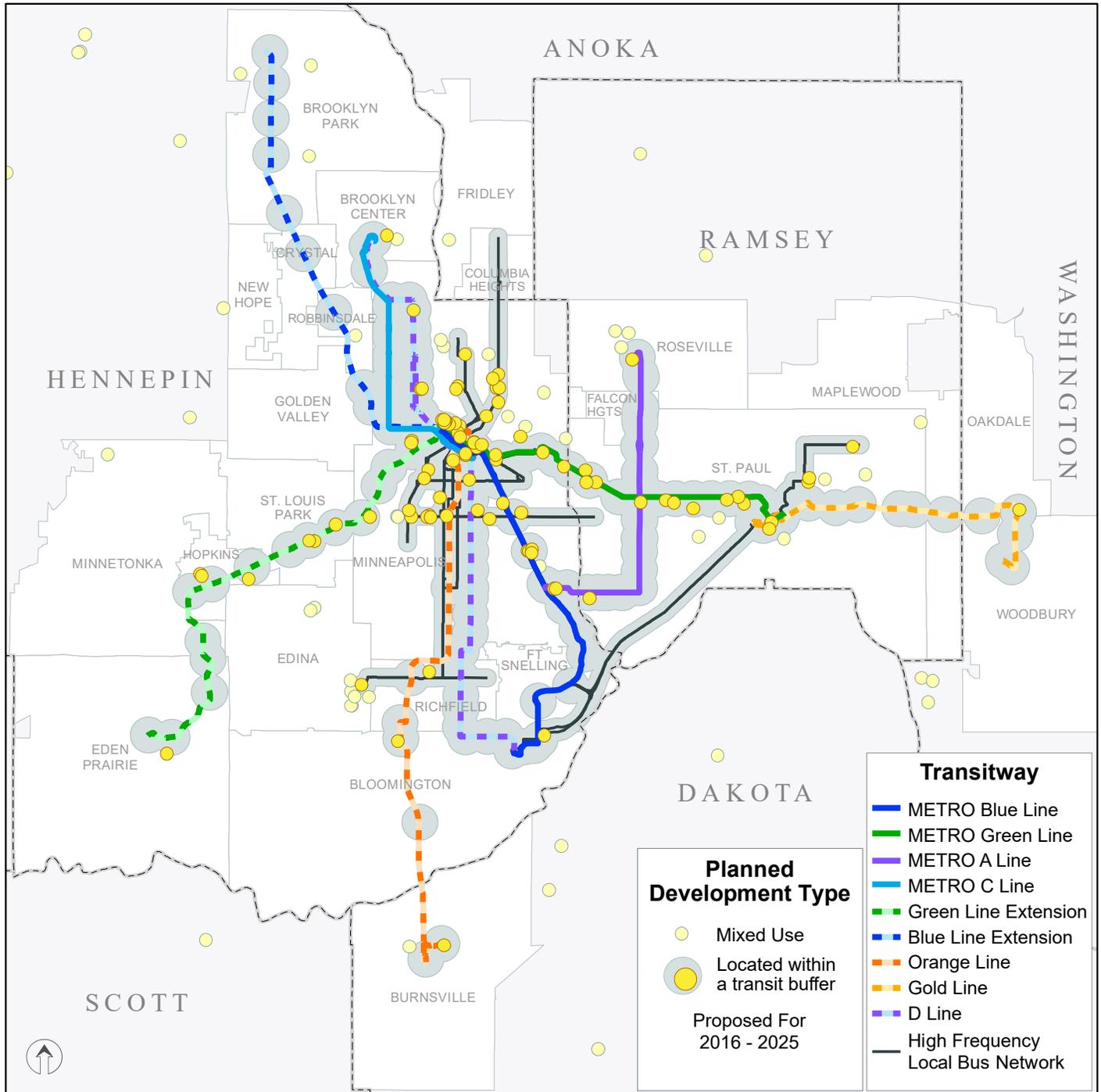
Map 8: Planned Industrial Development



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



74% of mixed use development is planned near high frequency transit (Map 9). Over 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 METRO Green Line and the METRO Blue Line and in areas served by high frequency transit.

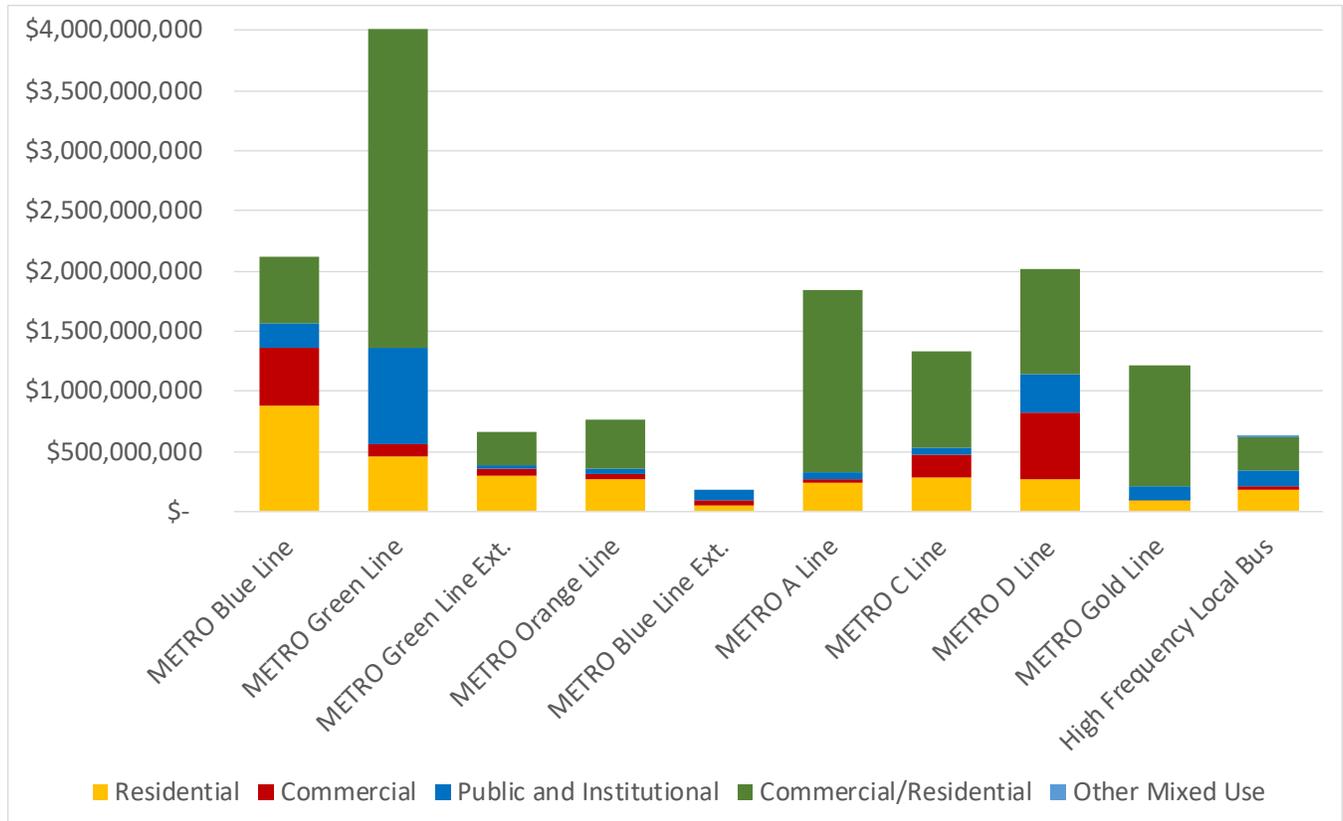
Planned Development by Transitway and High Frequency Local Bus

The Council has identified \$14.3 billion in planned development. Of that, \$9.5 billion (67%) is planned near high frequency transit. \$6.1 billion in development is planned near LRT stations. \$5.4 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 \$4.2 billion is planned along the Green Line, which is nearly twice the development that has been planned along other high frequency transitways. Nonetheless, development worth more than \$1.2 billion each has been planned along the Blue Line, A Line, C Line, D Line, and Gold Line.

Chart 17 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 Transitway⁹



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 more than 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. 74% of mixed-use development is planned near high frequency transit. Roughly 74% of commercial, 60% of residential and 58% of public and institutional development is planned near 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 17: Value of Planned Development near High Frequency Transit by Development Type

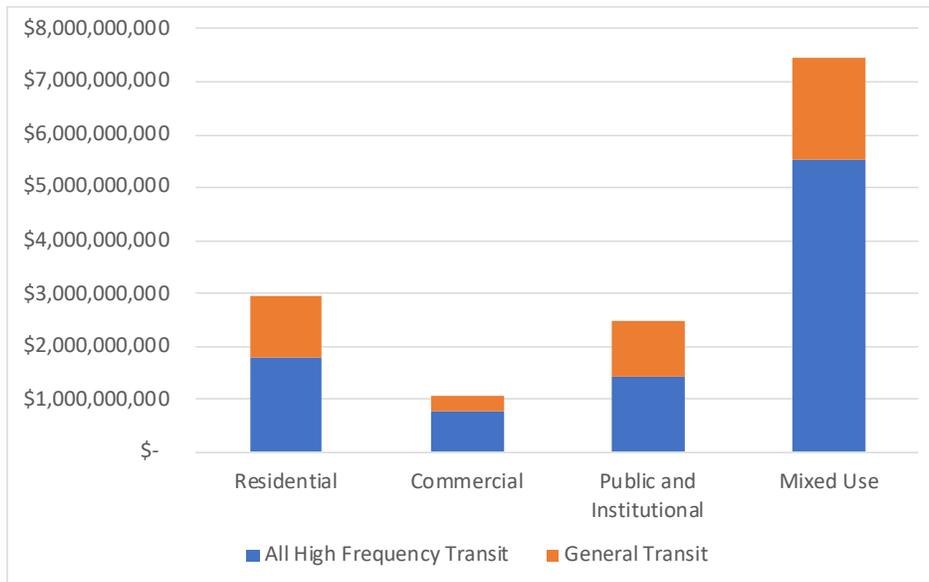
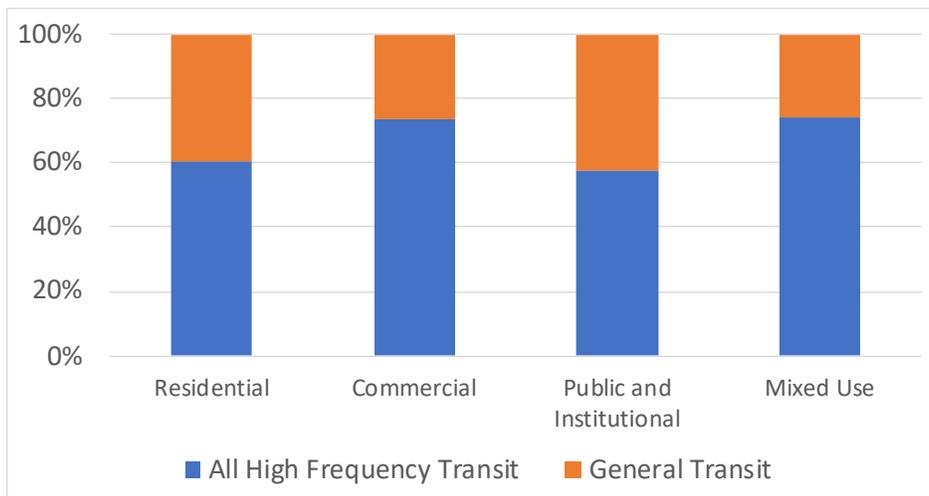


Chart 18: Share of Planned Development near High Frequency Transit by Development Type



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.

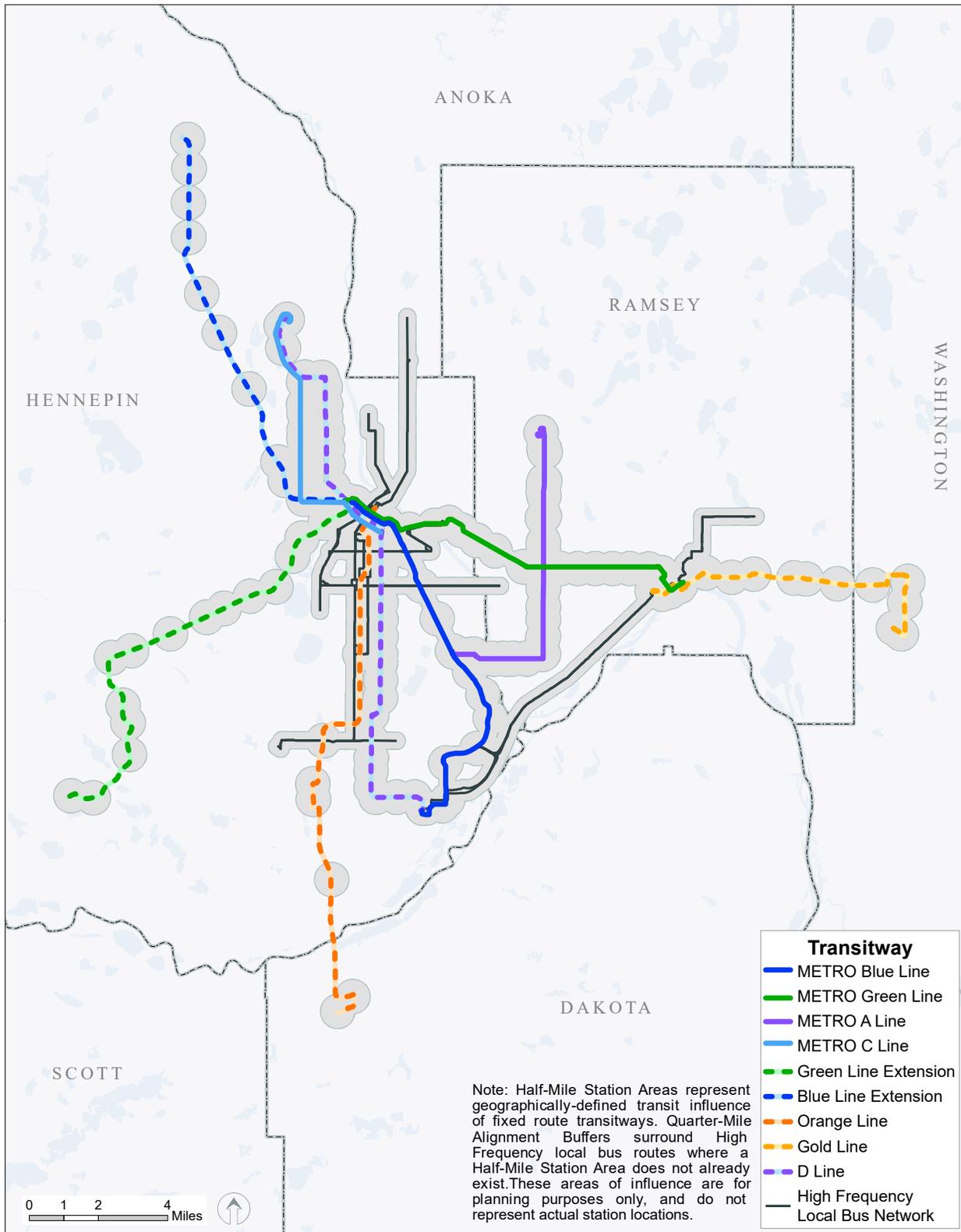
Data from the Metropolitan Council's building permits survey and the Council's population forecasts are available at metrotransit.org/data.



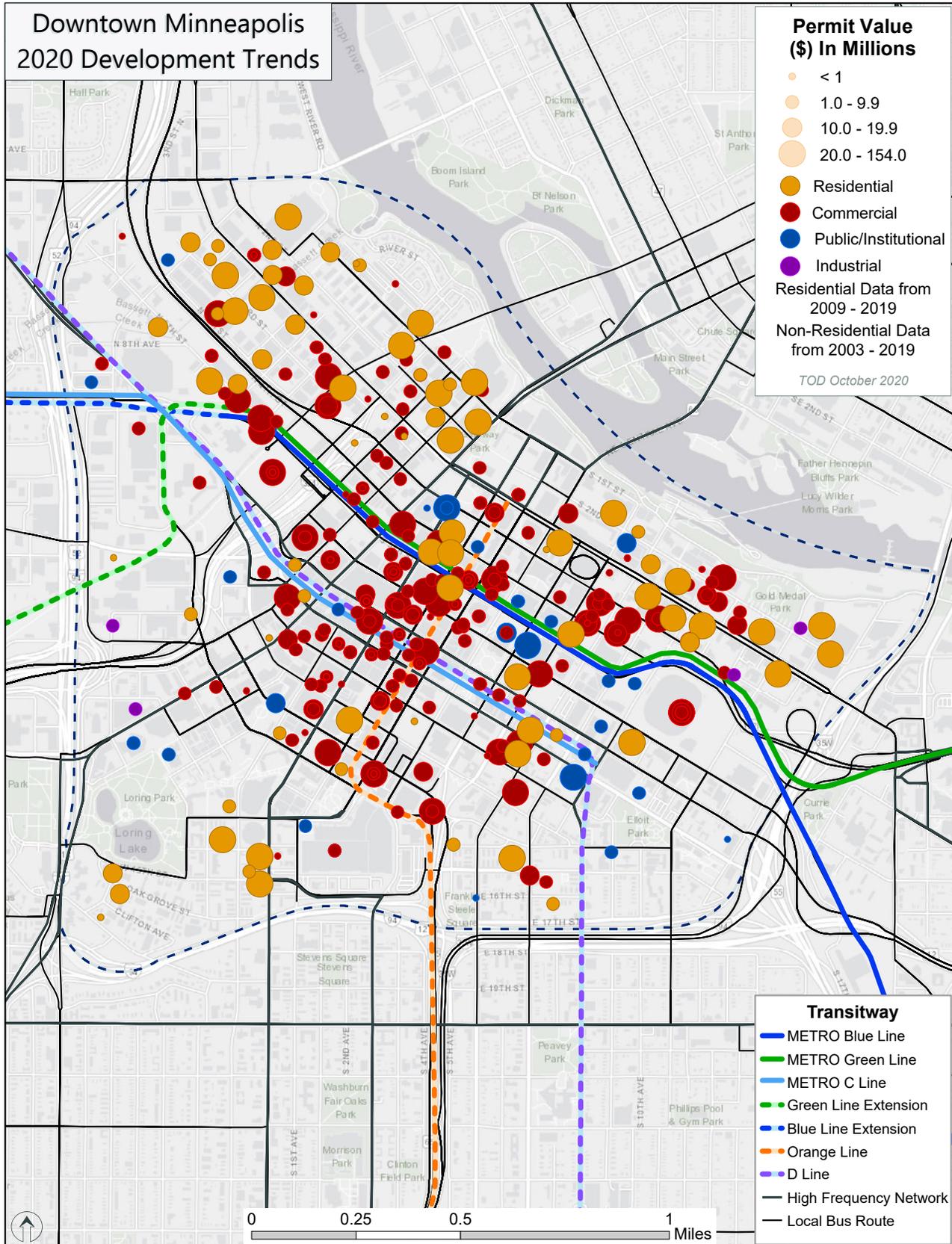


Appendix A – High Frequency Transit Map

Half-Mile Station Areas and Quarter-Mile Alignment Areas



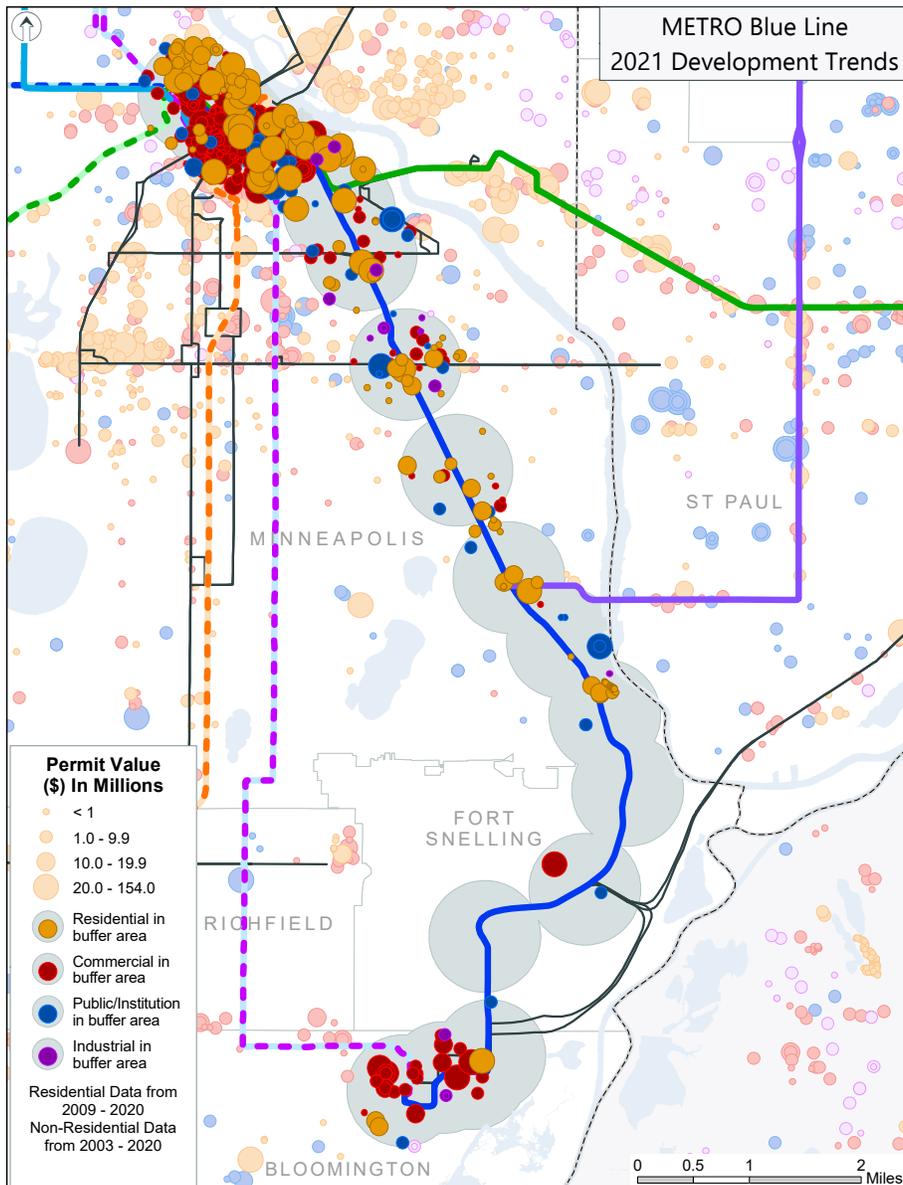
Appendix B – Downtown Minneapolis



Appendix C – Development by Transitway

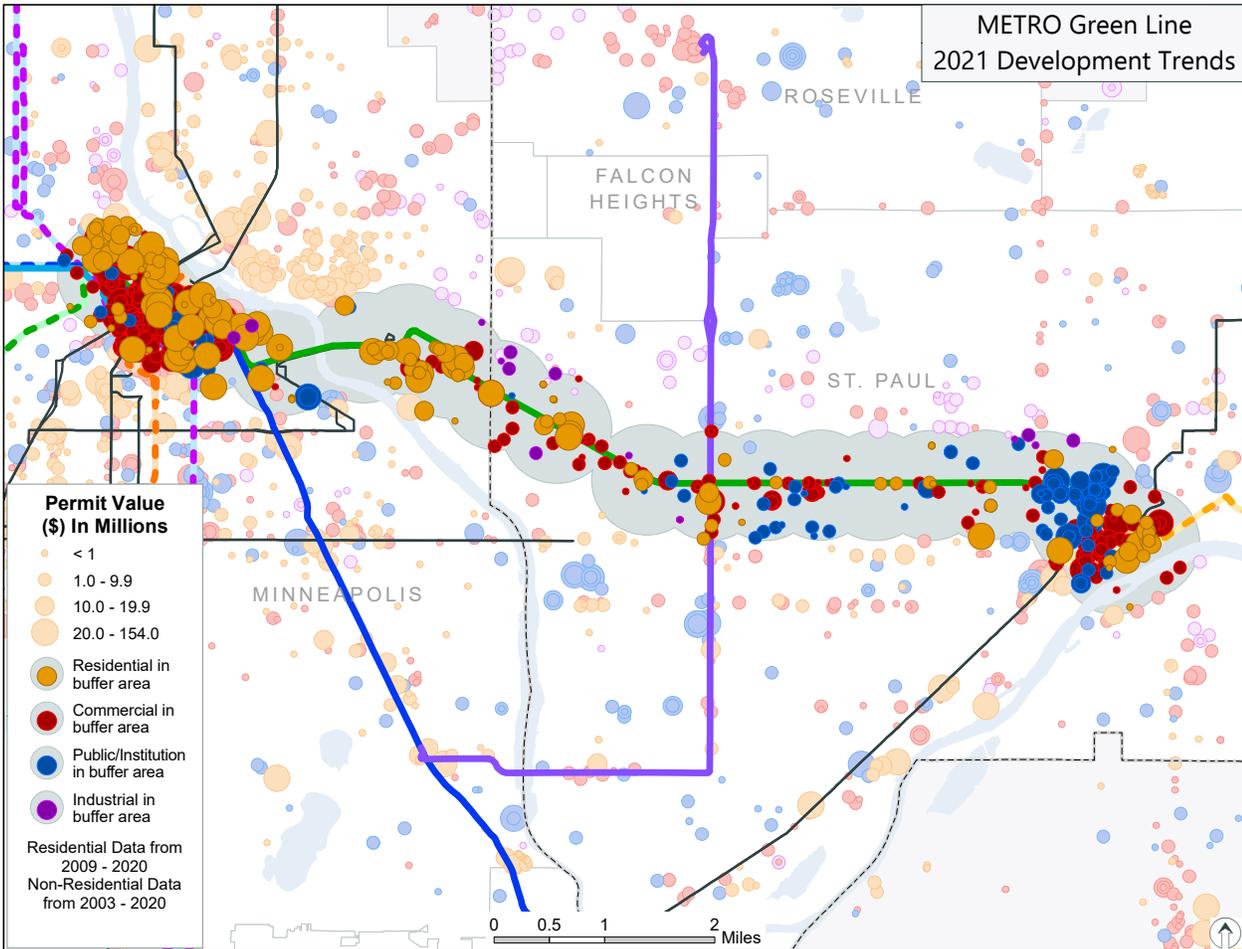
METRO Blue Line

Development Types	Permitted Development	Planned Development
Residential (Units)	12,340	10,503
Residential (Value)	\$2,253,212,283	\$883,158,000
Commercial (Value)	\$3,614,057,083	\$472,000,000
Public/Institutional (Value)	\$593,163,108	\$211,000,000
Industrial	\$23,046,314	N/A
Mixed Use (Value)	N/A	\$552,900,000
Total (Value)	\$6,485,745,626	\$2,119,058,000



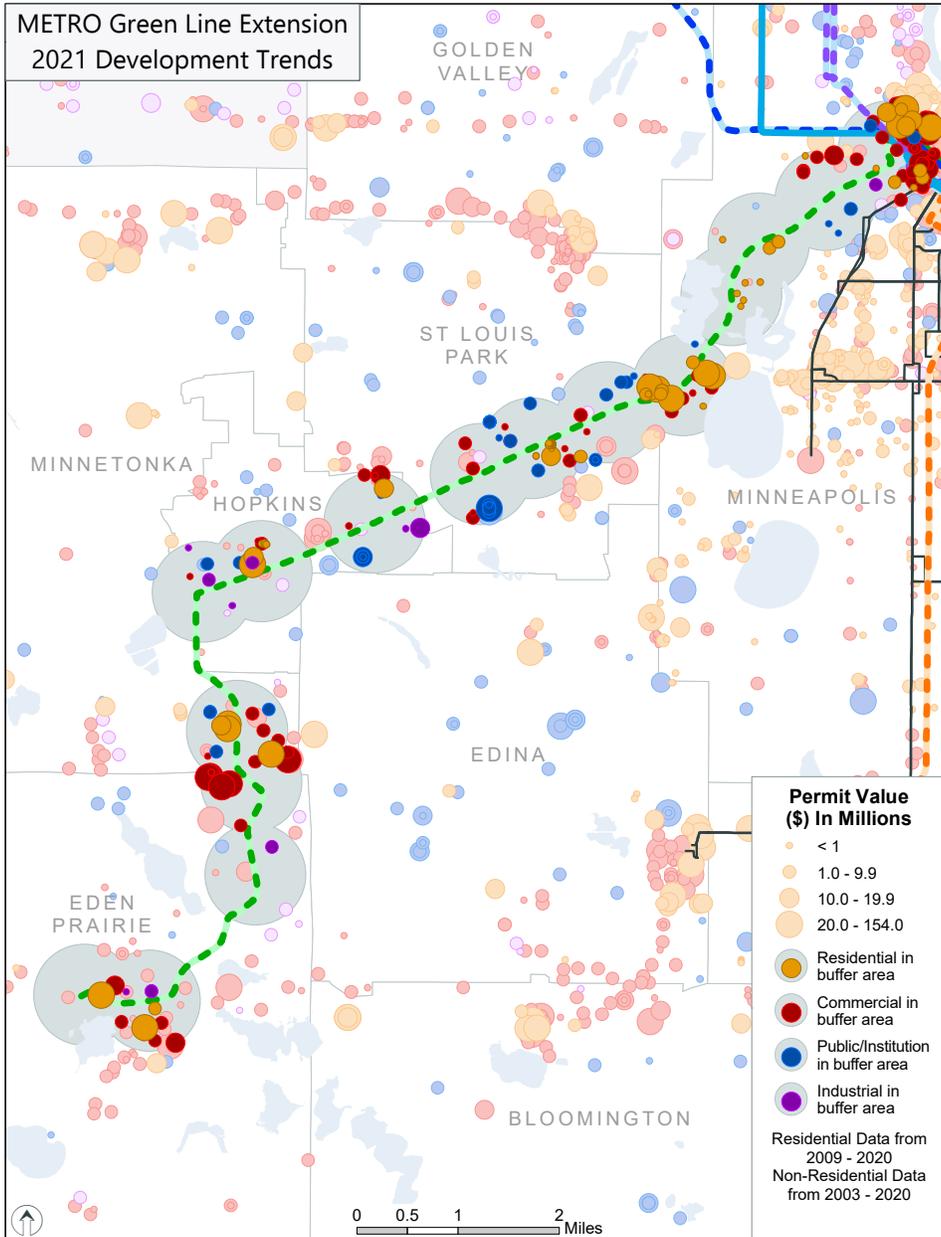
METRO Green Line

Development Types	Permitted Development	Planned Development
Residential (Units)	17,538	9,767
Residential (Value)	\$2,840,015,587	451,053,299
Commercial (Value)	\$3,699,316,168	\$110,700,000
Public/Institutional (Value)	\$921,145,298	\$803,000,000
Industrial	\$28,455,695	N/A
Mixed Use (Value)	N/A	\$2,855,800,000
Total (Value)	\$7,491,199,586	\$4,220,553,299



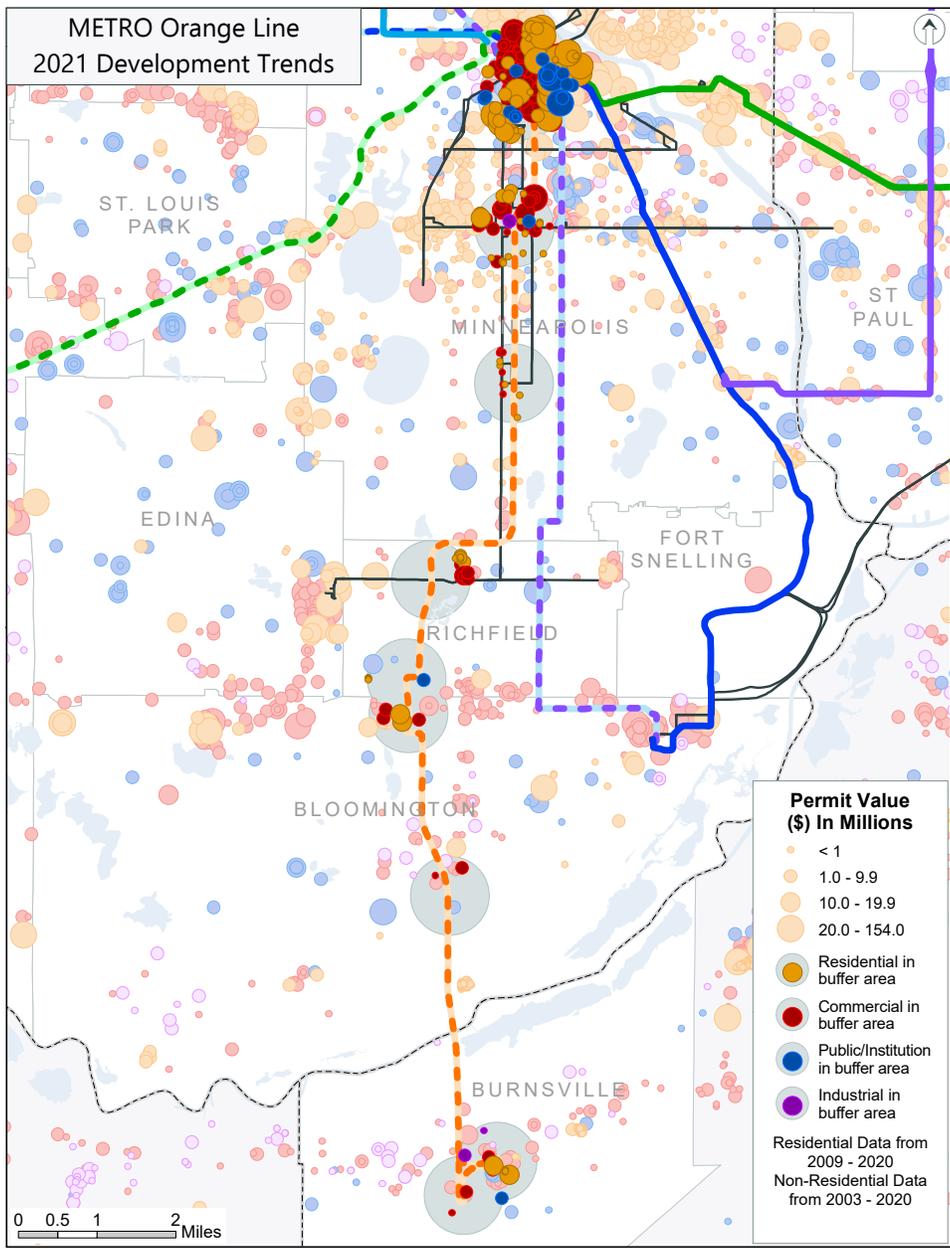
METRO Green Line Extension

Development Types	Permitted Development	Planned Development
Residential (Units)	4,312	7,372
Residential (Value)	\$631,480,002	\$298,600,000
Commercial (Value)	\$851,509,641	\$50,000,000
Public/Institutional (Value)	\$173,761,065	\$40,000,000
Industrial	\$34,493,869	N/A
Mixed Use (Value)	N/A	\$267,600,000
Total (Value)	\$1,691,244,577	\$656,200,000



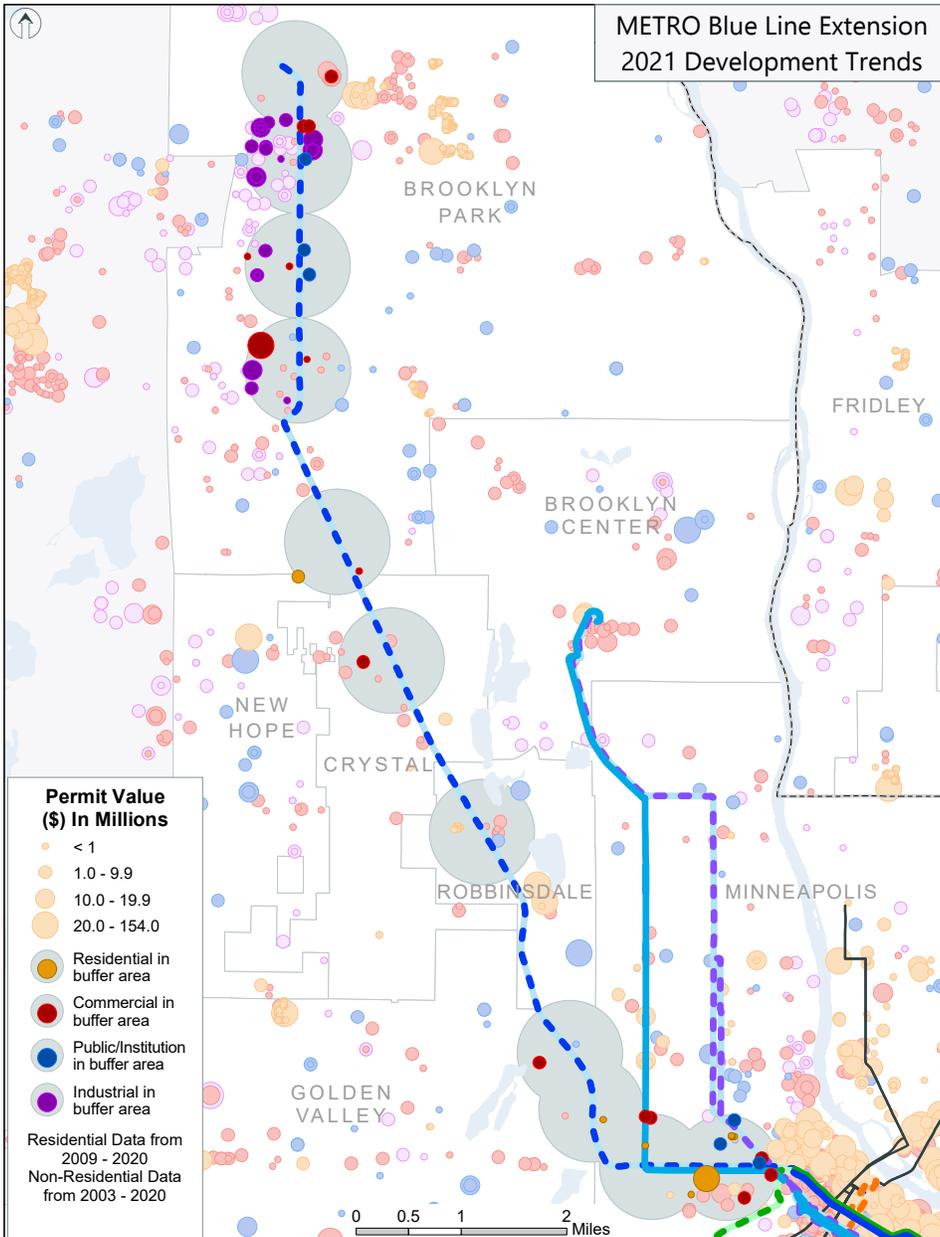
METRO Orange Line

Development Types	Permitted Development	Planned Development
Residential (Units)	6,047	5,233
Residential (Value)	\$1,141,521,870	\$273,300,000
Commercial (Value)	\$1,632,613,820	\$41,100,000
Public/Institutional (Value)	\$350,854,018	\$42,500,000
Industrial	\$11,029,671	N/A
Mixed Use (Value)	N/A	\$412,000,000
Total (Value)	\$3,136,019,379	\$768,900,000



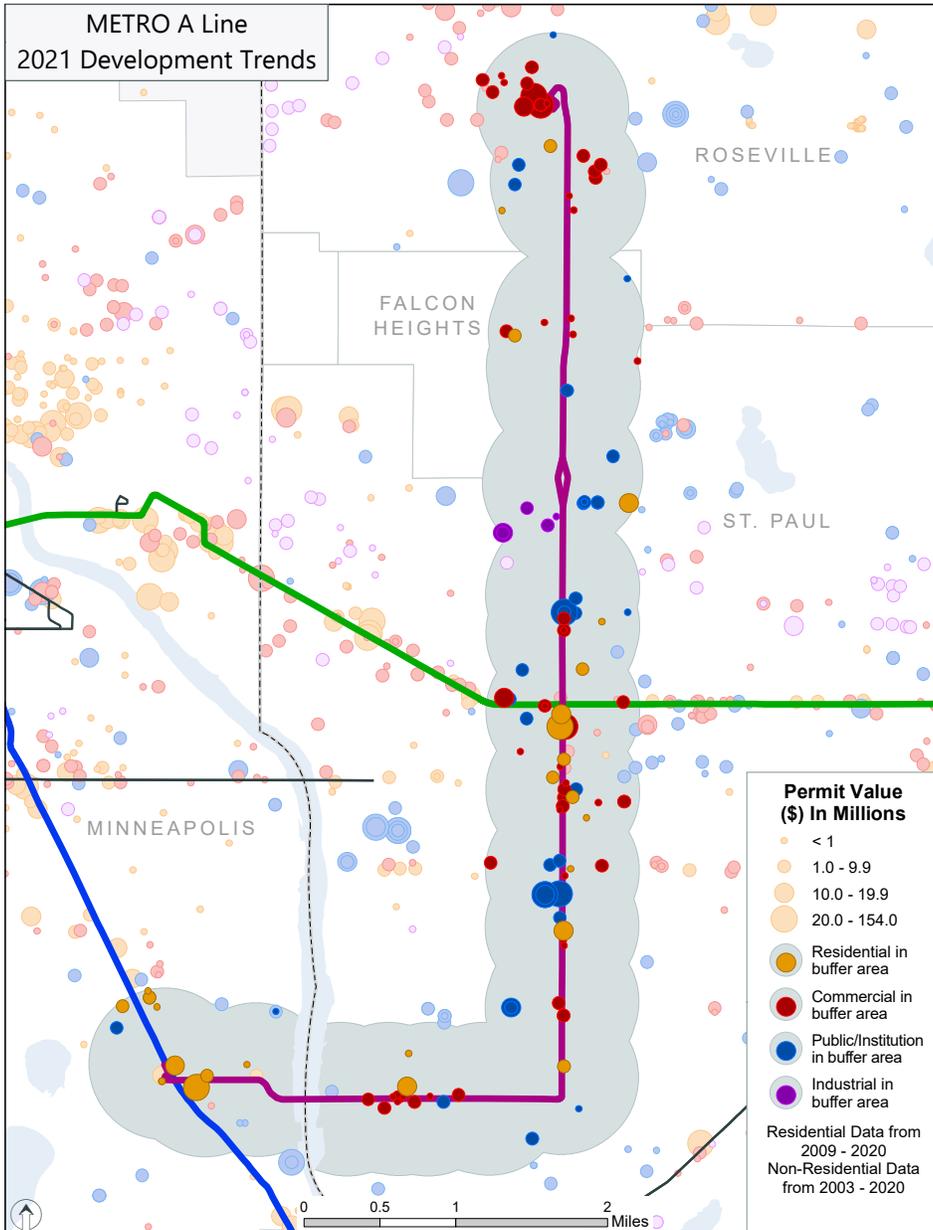
METRO Blue Line Extension

Development Types	Permitted Development	Planned Development
Residential (Units)	178	233
Residential (Value)	\$32,117,736	\$44,191,912
Commercial (Value)	\$72,823,145	\$45,200,000
Public/Institutional (Value)	\$22,069,439	\$85,000,000
Industrial	\$135,769,452	N/A
Mixed Use (Value)	N/A	N/A
Total (Value)	\$262,779,772	\$174,391,912



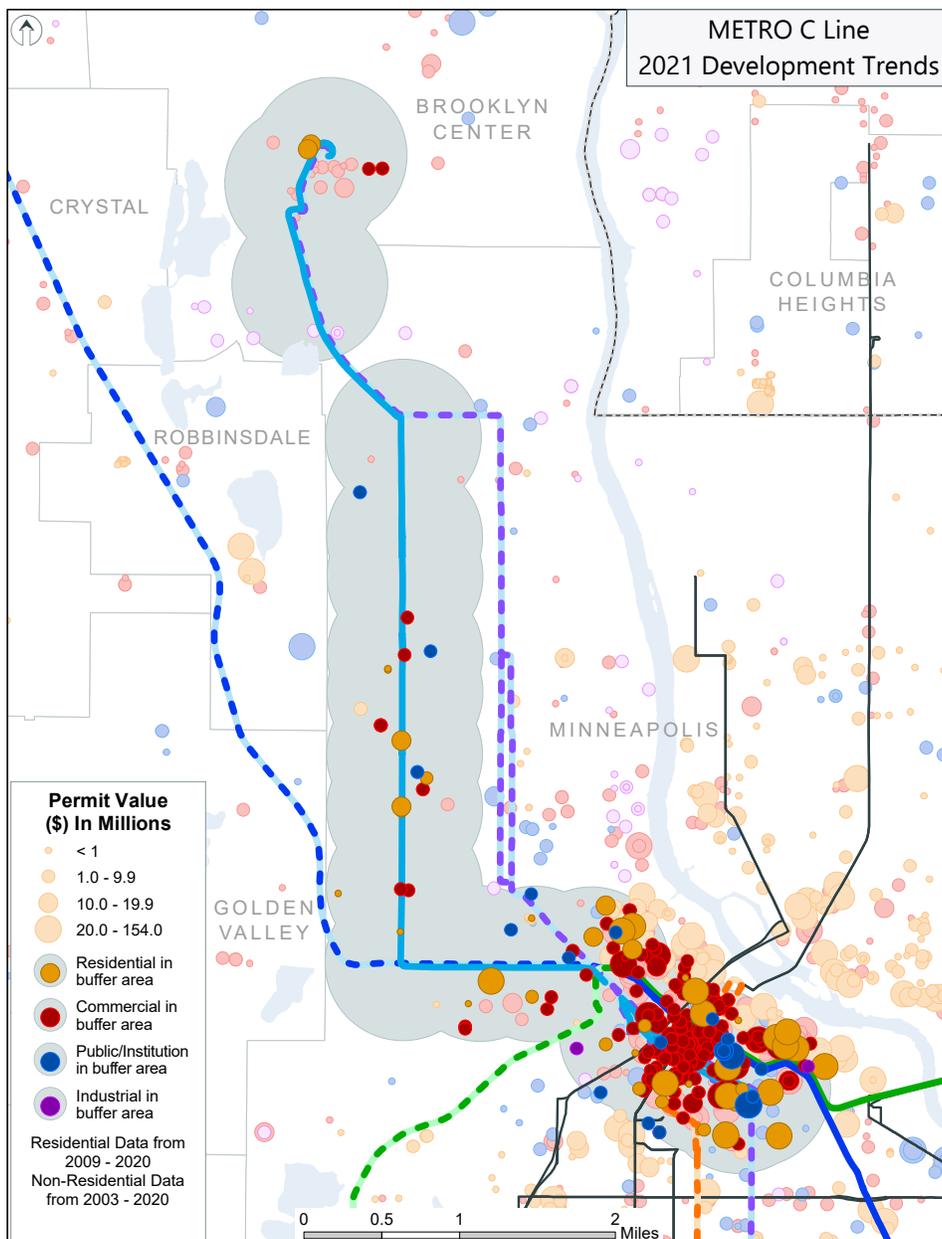
METRO A Line

Development Types	Permitted Development	Planned Development
Residential (Units)	1,322	6,021
Residential (Value)	\$162,245,372	\$245,500,000
Commercial (Value)	\$304,538,937	\$27,000,000
Public/Institutional (Value)	\$103,056,882	\$61,500,000
Industrial	\$16,696,930	N/A
Mixed Use (Value)	N/A	\$1,510,000,000
Total (Value)	\$586,538,121	\$1,844,000,000



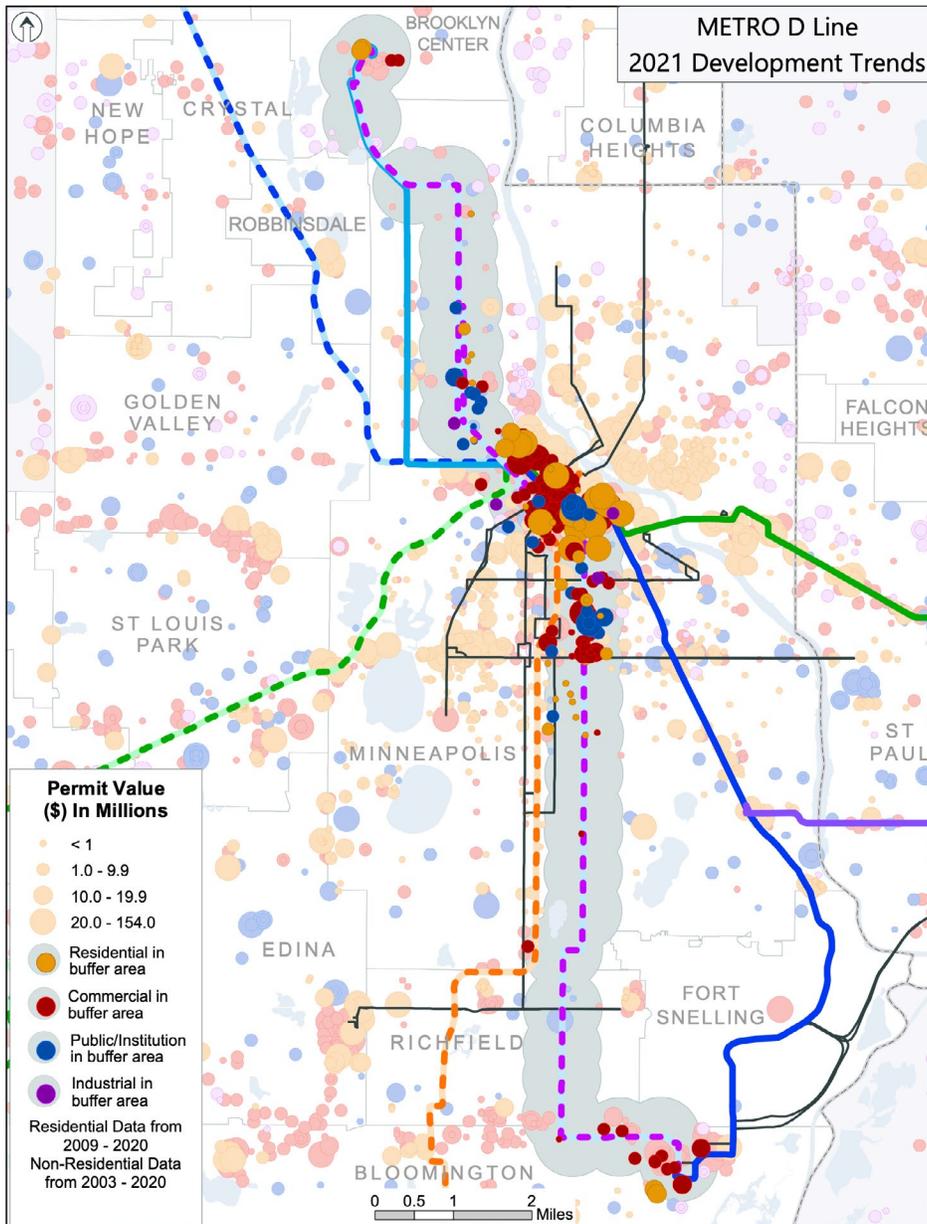
METRO C Line

Development Types	Permitted Development	Planned Development
Residential (Units)	4,465	7,645
Residential (Value)	\$935,363,622	\$289,891,912
Commercial (Value)	\$1,406,681,283	\$180,200,000
Public/Institutional (Value)	\$340,656,536	\$64,870,000
Industrial	\$2,921,105	N/A
Mixed Use (Value)	N/A	\$794,000,000
Total (Value)	\$2,687,889,384	\$1,328,961,912



METRO D Line

Development Types	Permitted Development	Planned Development
Residential (Units)	3,458	7,823
Residential (Value)	\$723,787,845	\$262,100,000
Commercial (Value)	\$904,946,185	\$562,200,000
Public/Institutional (Value)	\$231,485,093	\$323,870,000
Industrial	\$2,921,105	N/A
Mixed Use (Value)	N/A	\$869,600,000
Total (Value)	\$1,865,407,066	\$2,017,770,000



METRO Gold Line

Development Types	Permitted Development	Planned Development
Residential (Units)	711	1,561
Residential (Value)	\$80,309,701	\$86,653,299
Commercial (Value)	\$139,999,451	\$12,000,000
Public/Institutional (Value)	\$167,939,051	\$111,200,000
Industrial	N/A	N/A
Mixed Use (Value)	N/A	\$1,000,000,000
Total (Value)	\$388,248,203	\$1,209,853,299

