Development Trends Along Transit

Regional growth near high frequency transit in the Twin Cities

2019 Report

Metro Transit

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Executive Summary

The Twin Cities continue to grow. According to the Metropolitan Council, the region gained 225,000 new residents between 2010 and 2017 and it is expected to gain another 384,000 residents by the year 2030. Where these residents choose to live and work will have a meaningful impact on the region. Infill development located 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 2018, 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 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 $12 billion in development has been permitted near high frequency transit in the last 15 years[1].

This includes projects that have been completed since being permitted, and ongoing projects. $8.1 billion of that development permit value is located within one half-mile of an LRT station, $3.1 billion is located within a half-mile of a BRT station, and $3.3 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 34.5% 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 29,000 multifamily units along high frequency transit, and another $8.2 billion in development value near high frequency transit. Nearly 50% of the planned development for the region is mixed use (commercial and residential uses in the same development) and 80% 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.

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

PERMITTED Development Highlights:

- **$12 billion** in development has been permitted along high frequency transit. This represents 35.4% of regional development.
  - **$8.1 billion** near LRT stations
  - **$3.1 billion** near BRT stations
  - **$3.3 billion** near high frequency local bus
- **27,950** multifamily units have been permitted near high frequency transit. This represents 40% of multifamily units in the region.
  - **17,868** units near LRT stations
  - **4,891** units near BRT stations
  - **8,663** units near high frequency local bus
- **35.4%** of regional development has occurred along high frequency transit.
  - **43%** multifamily development
  - **39%** commercial development
  - **29%** public and institutional development
  - **7.3%** industrial development

PLANNED Development Highlights:

- **$8.2 billion** in development is planned along high frequency transit. This represents 60% of the development planned in the region.
  - **$5.1 billion** near LRT stations
  - **$4.6 billion** near BRT stations
- **29,000** multifamily units along high frequency transit. This represents 44% of the units planned in the region.
  - **10%** of the units along high frequency transit are anticipated to be affordable units.
  - **15,000** multifamily units near LRT stations
  - **14,000** multifamily units near BRT stations
  - **54%** of multifamily units as part of a mixed use development
- **Nearly 50%** of planned development in the region is mixed use.
  - **80%** near high frequency transit
  - Roughly **50%** 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. Past *Development Trends Along Transit* reports have only included high frequency Light Rail Transit (LRT) and Bus Rapid Transit (BRT) transitways, which make up the METRO network[2]. This year, high frequency local bus routes have been included alongside transitways 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 5 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 report.

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 report, 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

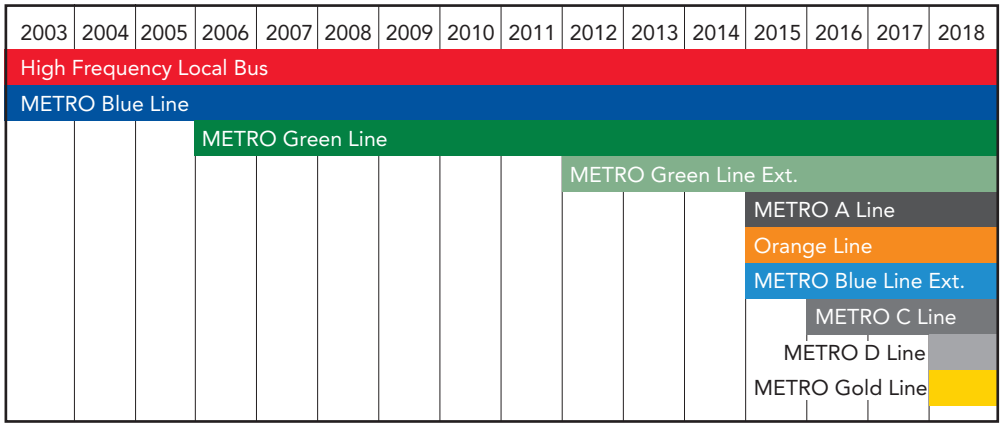
This report includes data beginning in 2003 for commercial, public/institutional, and industrial development, and beginning in 2009 for multifamily residential development. As in past years, developments are assigned to a transitway only when permitted or planned after a certain point in the transitway 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.

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.



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 $34 billion in permitted development value since 2003, with over $14 billion in permit value for commercial developments alone. Over the same period, nearly $12 billion has been permitted near high frequency transit, representing more than 35% 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 does appear to have 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 2018, permits worth $1.8 billion were issued for developments near transit (40% of regional development). Within transit corridors, 68% of the permitted value for developments is occurring near LRT stations, including nearly 18,000 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:

- **$11.9 billion** in development has been permitted along high frequency transit. This represents 35.4% of regional development.
  - **$8.1 billion** near LRT stations
  - **$3.1 billion** near BRT stations
  - **$3.3 billion** near high frequency local bus
- **27,950** multifamily units have been permitted near high frequency transit. This represents 40% of multifamily units in the region.
  - **17,868** units near LRT stations
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  - **43%** multifamily development
  - **39%** commercial development
  - **29%** public and institutional development
  - **7.3%** industrial development

Multifamily Residential

Permits were issued for $864 million in multifamily development along high frequency transit in 2018. This represents a 50% increase in permit value from 2017 and the largest volume of development by permit value since 2009, which was the first year these data were collected. The developments permitted in 2018 alone will contribute 4,386 new housing units to the region. In particular, the number of units near BRT stations increased from 642 units in 2017 to 1,683 units in 2018, with a total 2018 permit value of $351 million.

Since 2009 over 27,000 multifamily units and $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, 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 over $4 billion in permit value between 2009 and 2018, with townhomes carrying the next highest total permit value at just under $22 million. 64% of the permit value for MF5 developments near high frequency transit occurred near LRT, with high frequency local bus serving 32% of the permit value for MF5 developments. 48% of the permit value for townhomes occurred in areas served by high frequency transit occurred near LRT service. Thus, most townhomes and MF5 developments near transit are along LRT lines, while the majority of 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 ($200,811,070) and the Blue Line ($210,654,296) 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%
Total	**27,950**	**$4,268,748,855**	**43.2%**	

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

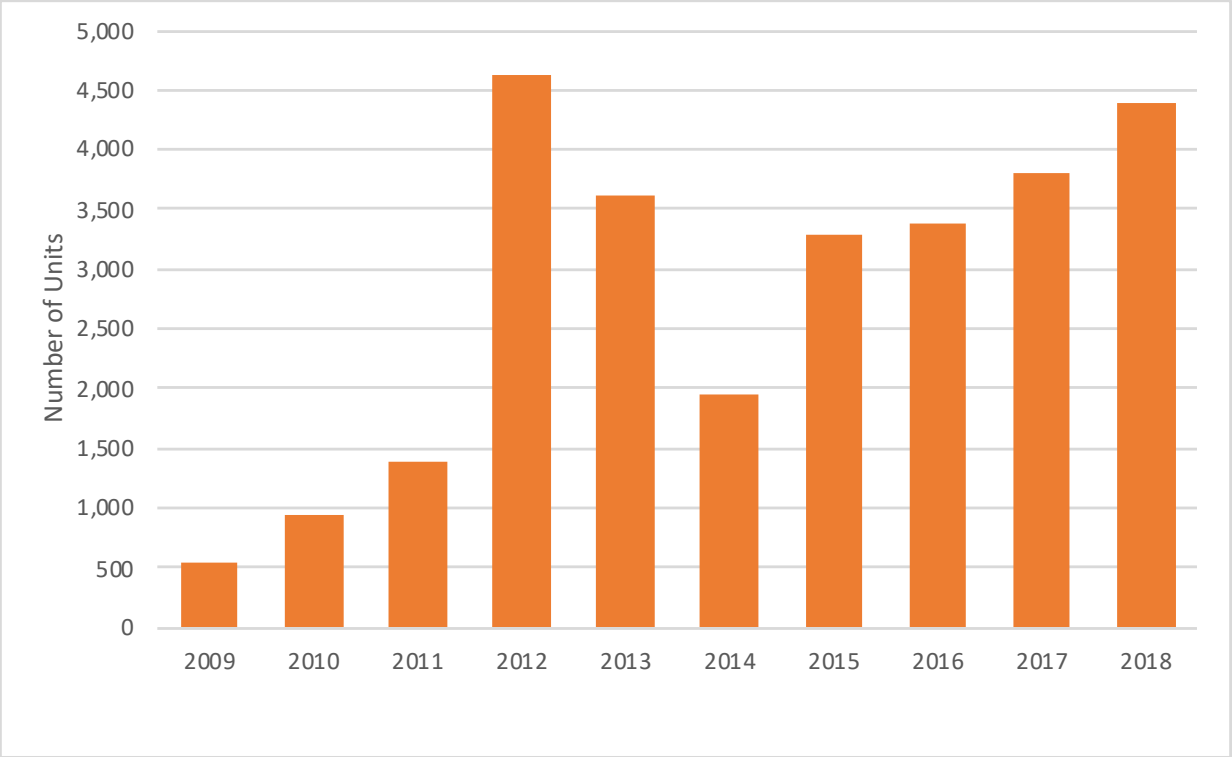


Chart 3: Permitted Multifamily near High Frequency Transit by Permit Value yearly total

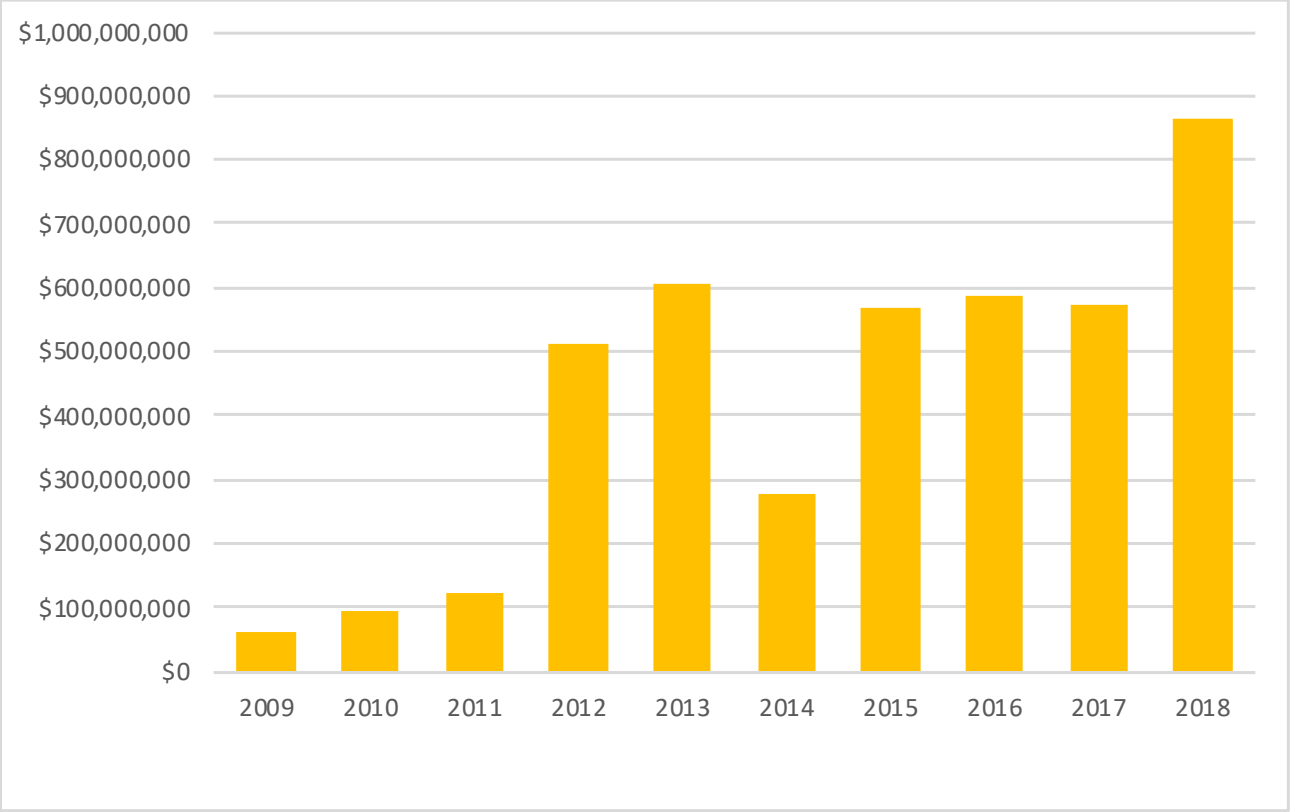
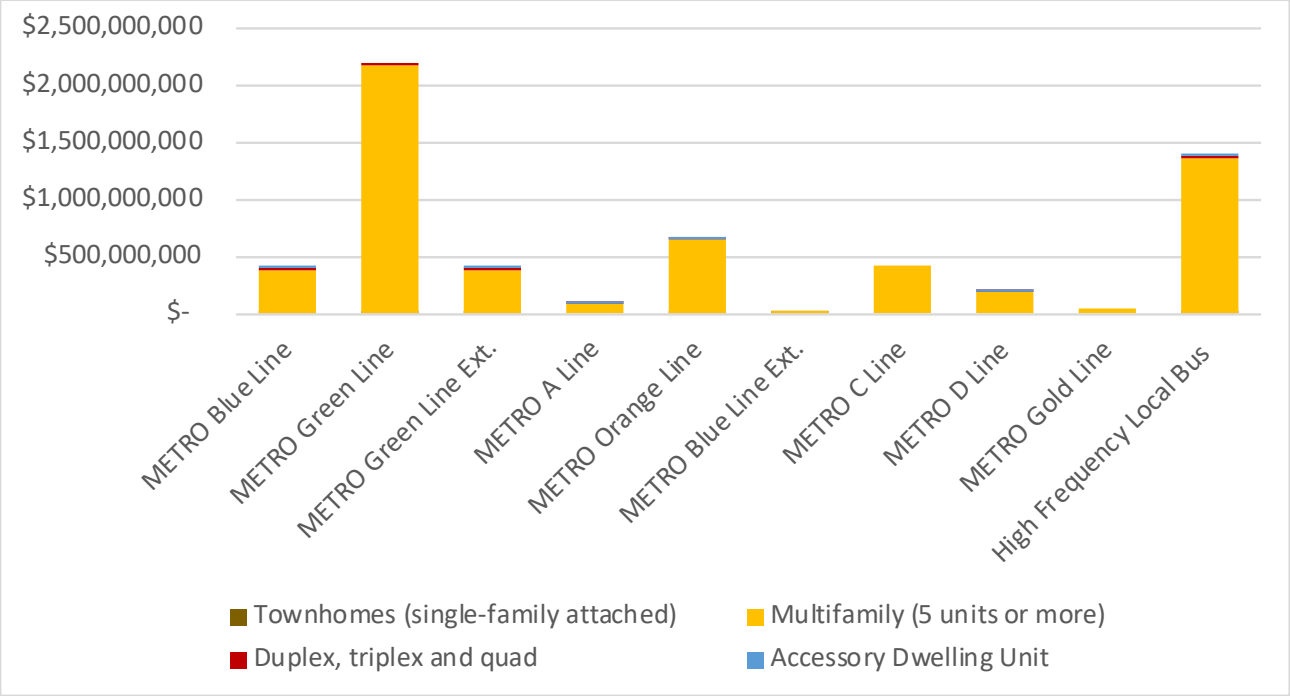
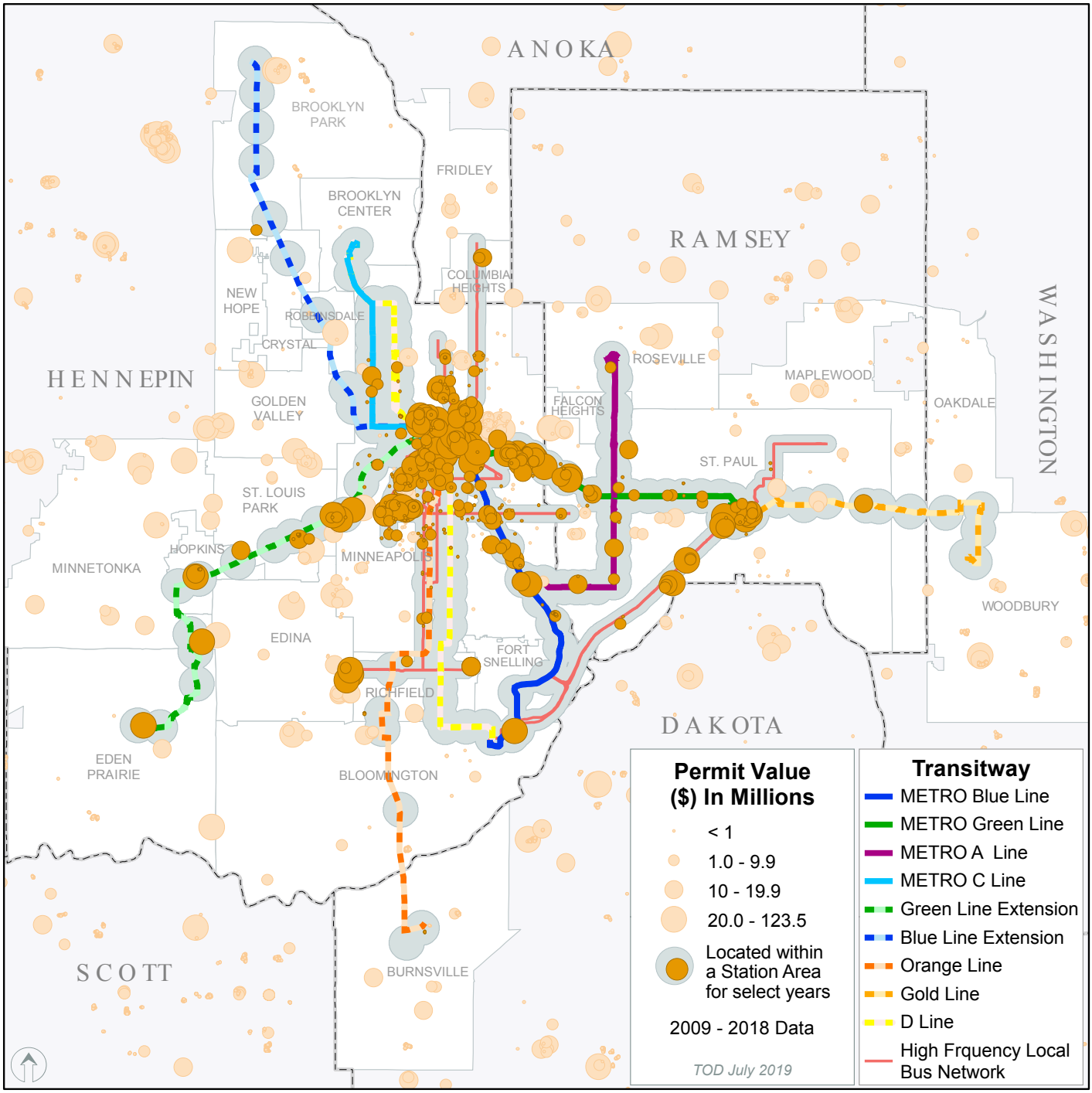


Chart 4: Permitted Multifamily Units near High Frequency Transit by Type and Transit Route[4]



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

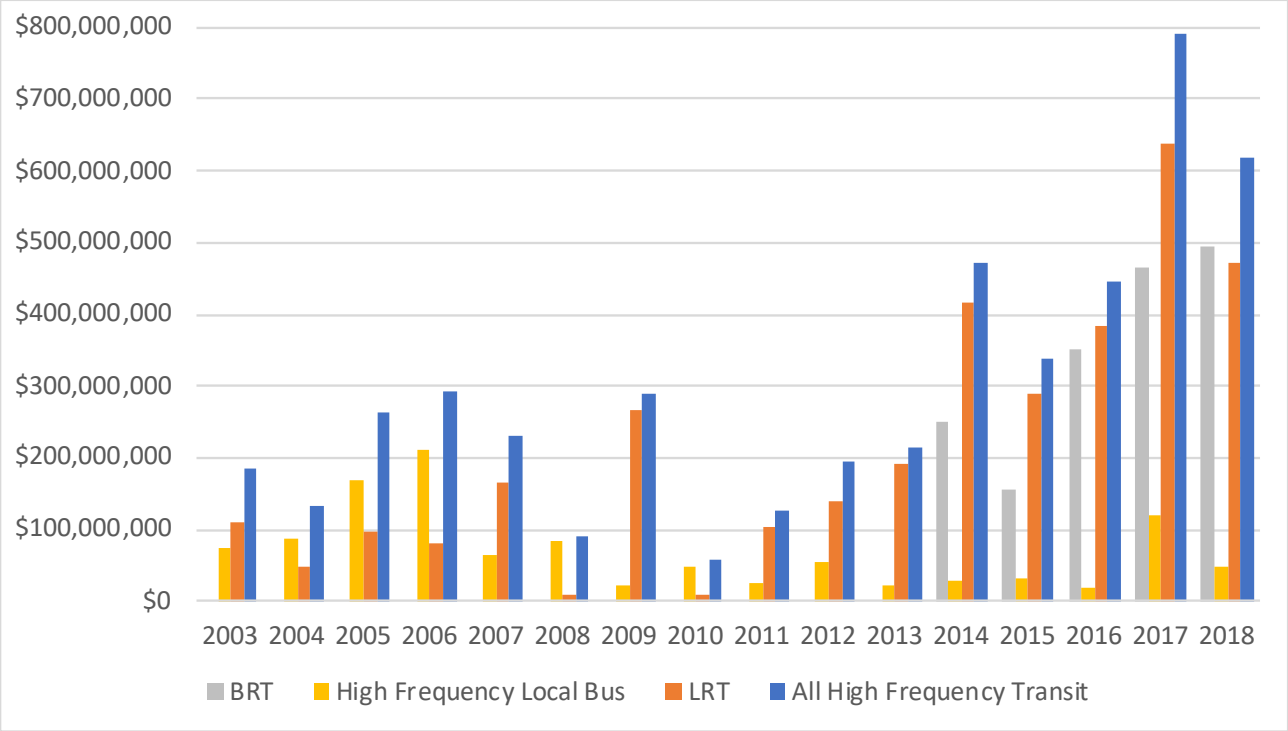
In 2018, commercial development permit value for all high frequency transit exceeded $600 million. This represents 43% of the commercial development that occurred in the entire region. $367 million was permitted just along the D Line in 2018. The general trend remains positive for both regional commercial development value and commercial development near high frequency transit, with value steadily increasing from 2010 to 2018.

Over $5.5 billion in commercial development has occurred within areas served by high frequency transit since 2003, a total which represents nearly 40% 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 over $2.3 billion each in permit value attributed to the Blue Line and the Green Line. This increase over the $3.7 billion in commercial development covered by the 2018 version of this report is due in part to the addition of new transit lines and high frequency local bus service, with high frequency local bus service alone supporting an additional $1.1 billion.

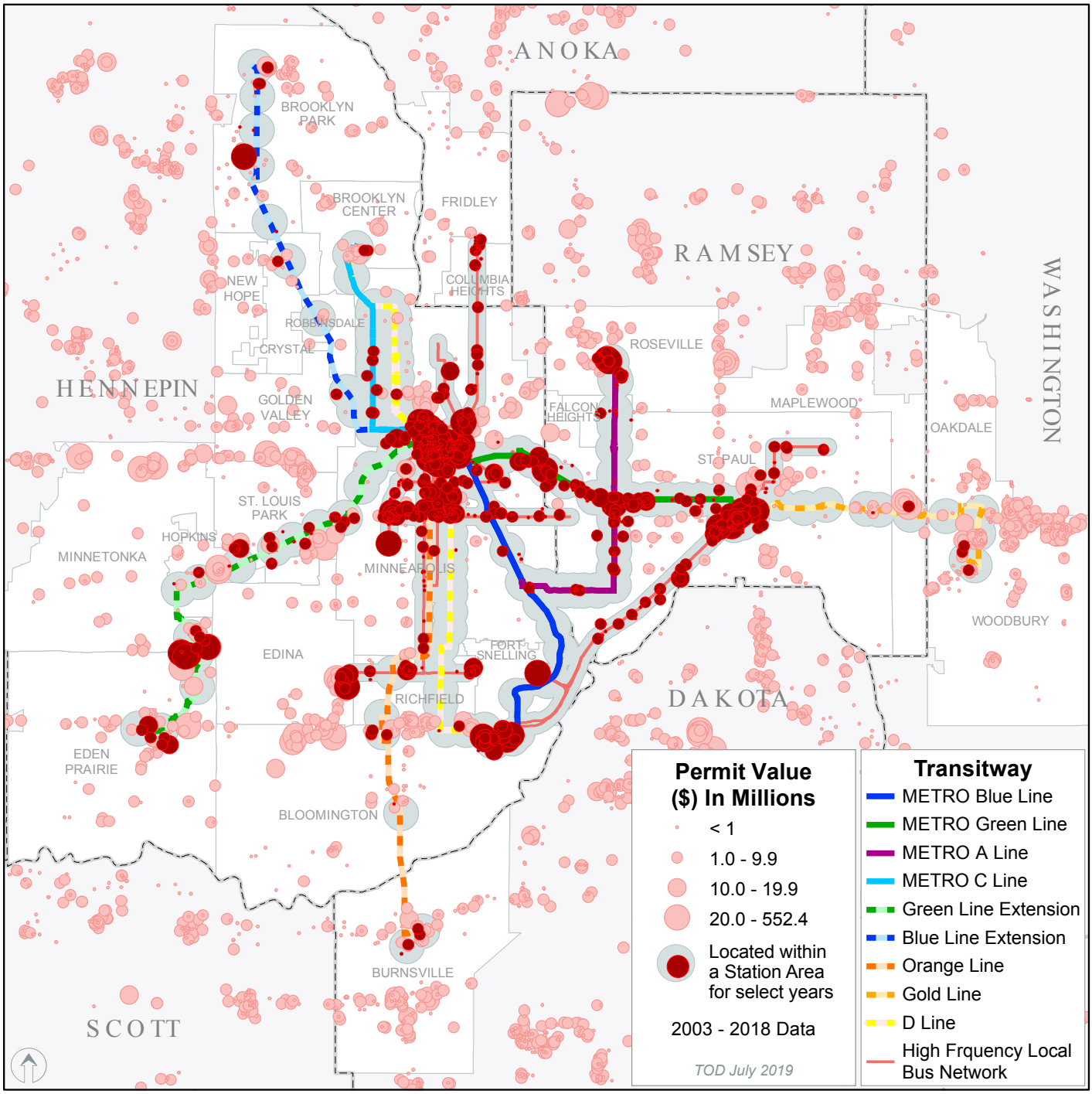
As might be expected with commercial development, permits and permit value cluster near established commercial corridors. Areas served by high frequency transit contain 39% of the region's commercial development, with those commercial corridors near high frequency transit containing both the highest 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



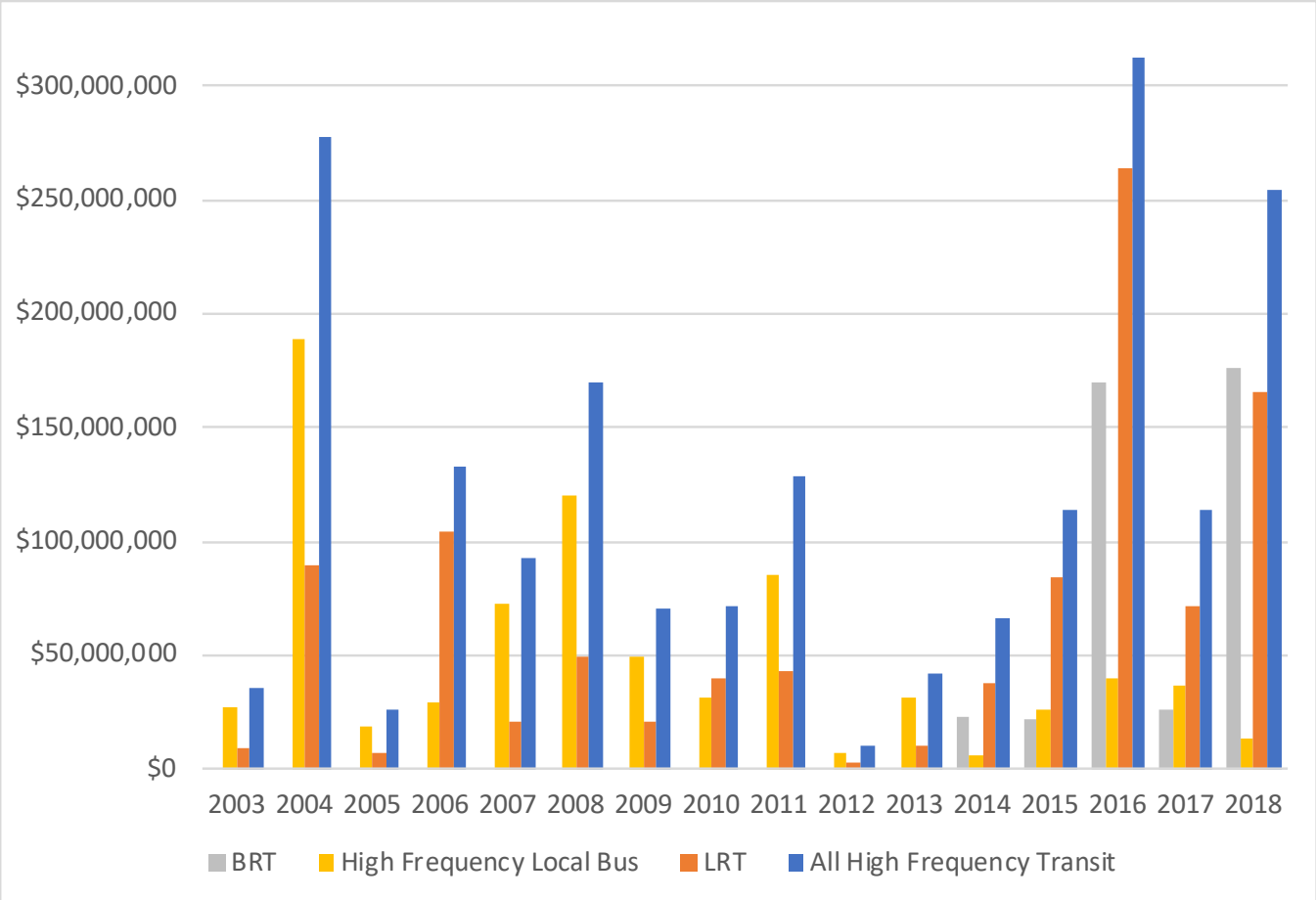
Commercial development continues the trend of clusters near established urban cores and along transit corridors, as shown in Map 2. High value development permits can be seen within both downtowns, the Uptown neighborhood, and near Mall of America. Commercial development not yet served by high frequency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

Public and Institutional

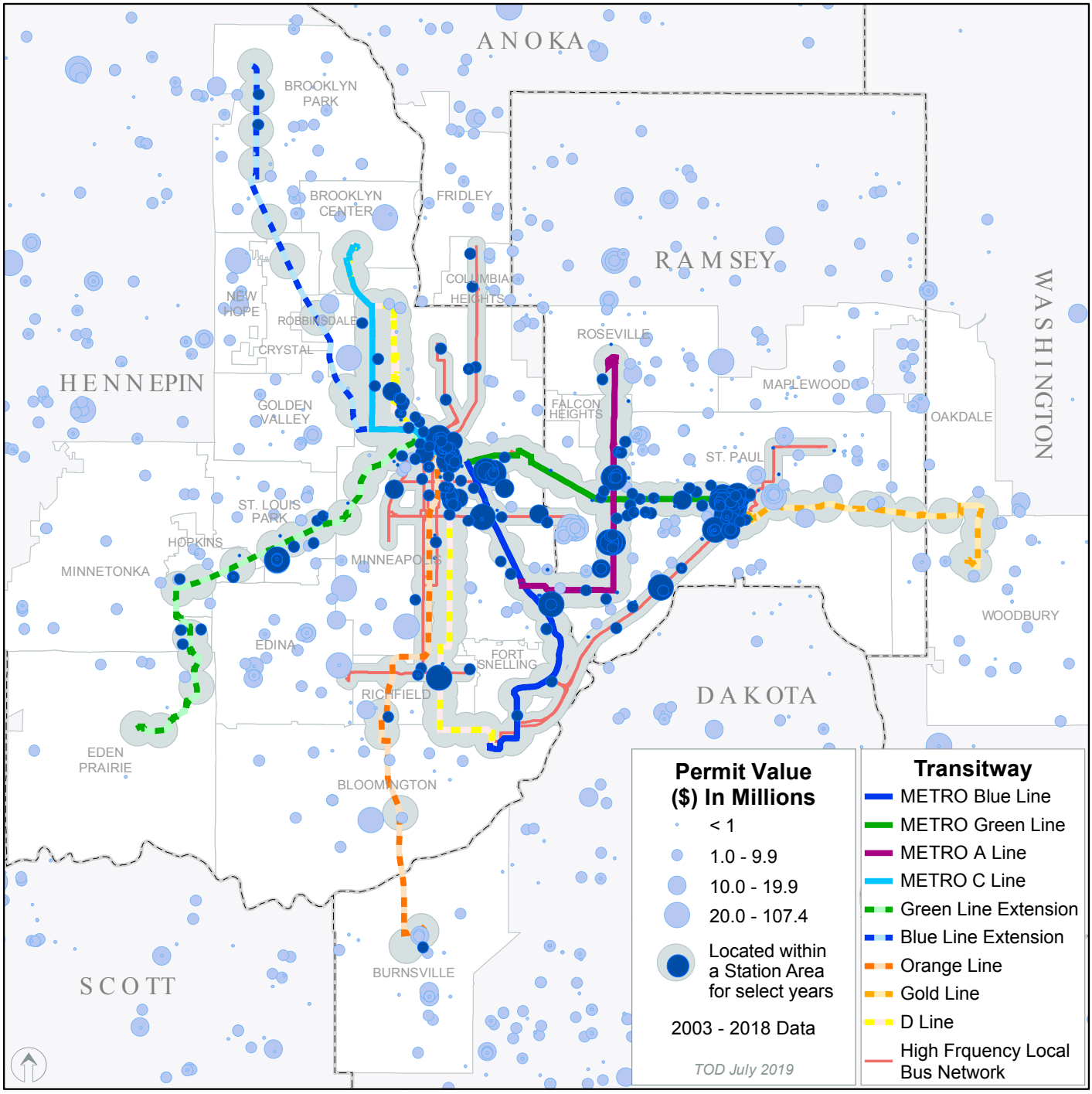
Accessibility to public and institutional developments such as government buildings, hospitals, parks and schools is an important consideration in determining their location. Placing such developments near transit fosters equity by increasing accessibility to the important community services that these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

Over 29% of the region's public and institutional development has occurred near high frequency transit since 2003, with just under $2 billion in permit value. In 2018, public and institutional investments near transit totaled $254 million, a 123% increase over 2017. Although it is more difficult to identify any general trends in public and institutional development – development has mostly varied between $10 million and $170 million per year since 2003, with no perceivable upwards or downwards trend – 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. 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



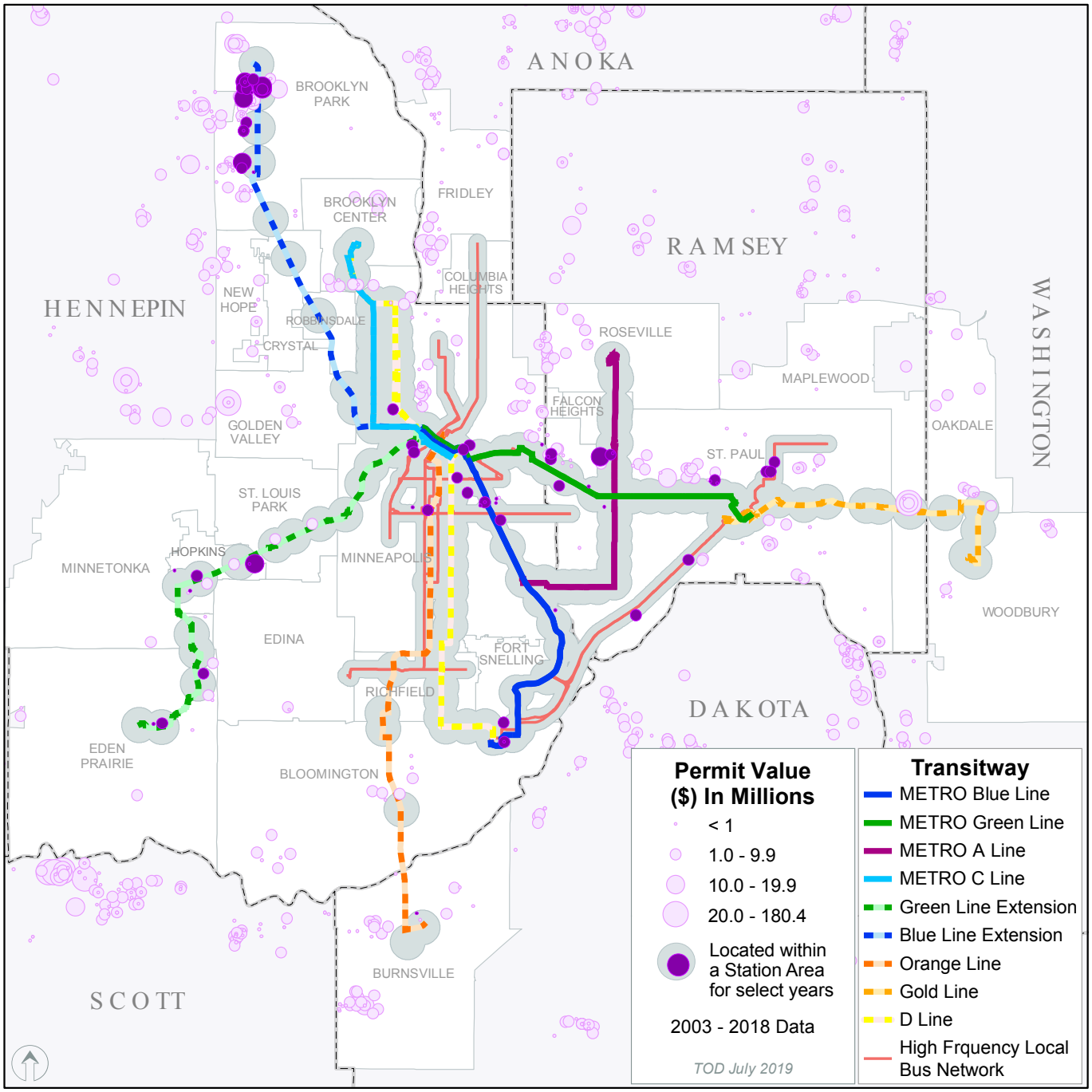
Although there are fewer public and institutional developments than commercial or residential developments generally, Map 3 shows clustering near both established transitways and planned transitways.

Industrial

From 2014 to 2017, industrial development permits occurred almost exclusively along the Blue Line Extension or the Green Line Extension as shown in Chart 7; 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 2003, 7.3% 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 Transitway[5]

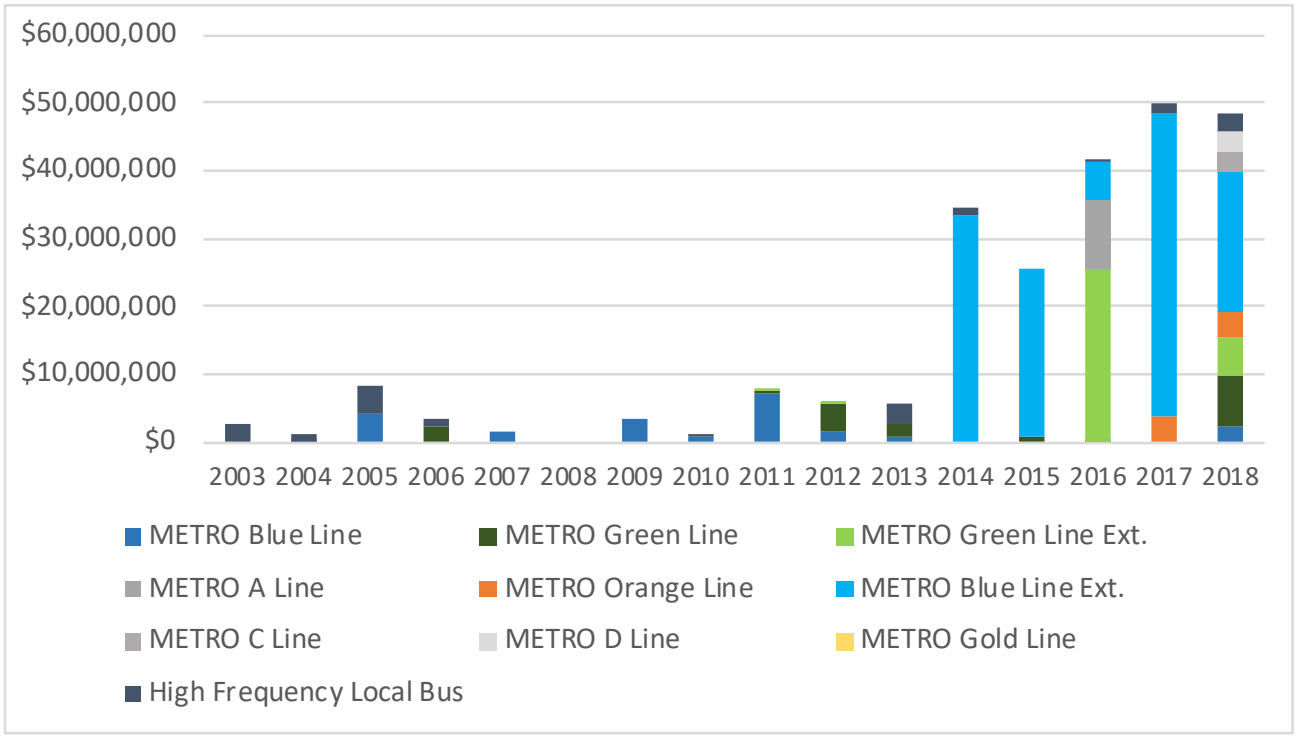
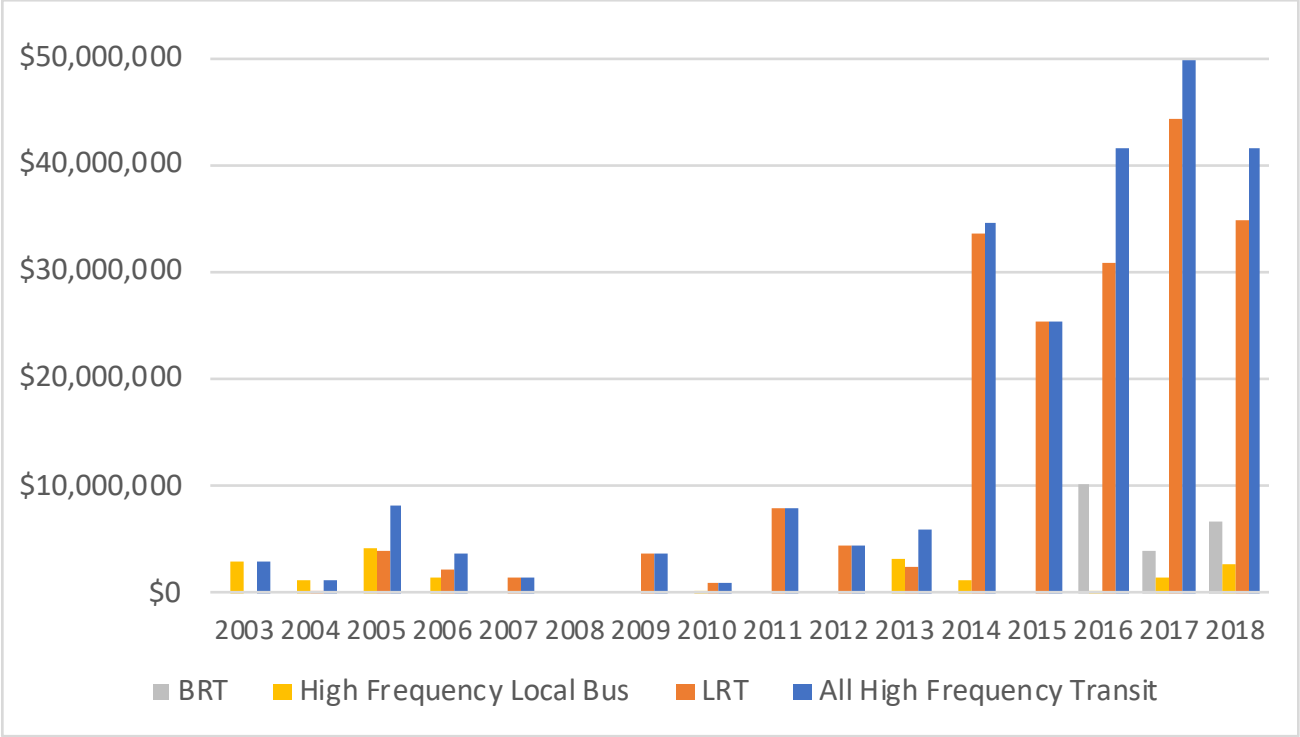


Chart 8: Industrial Permit Value near High Frequency Transit by Year

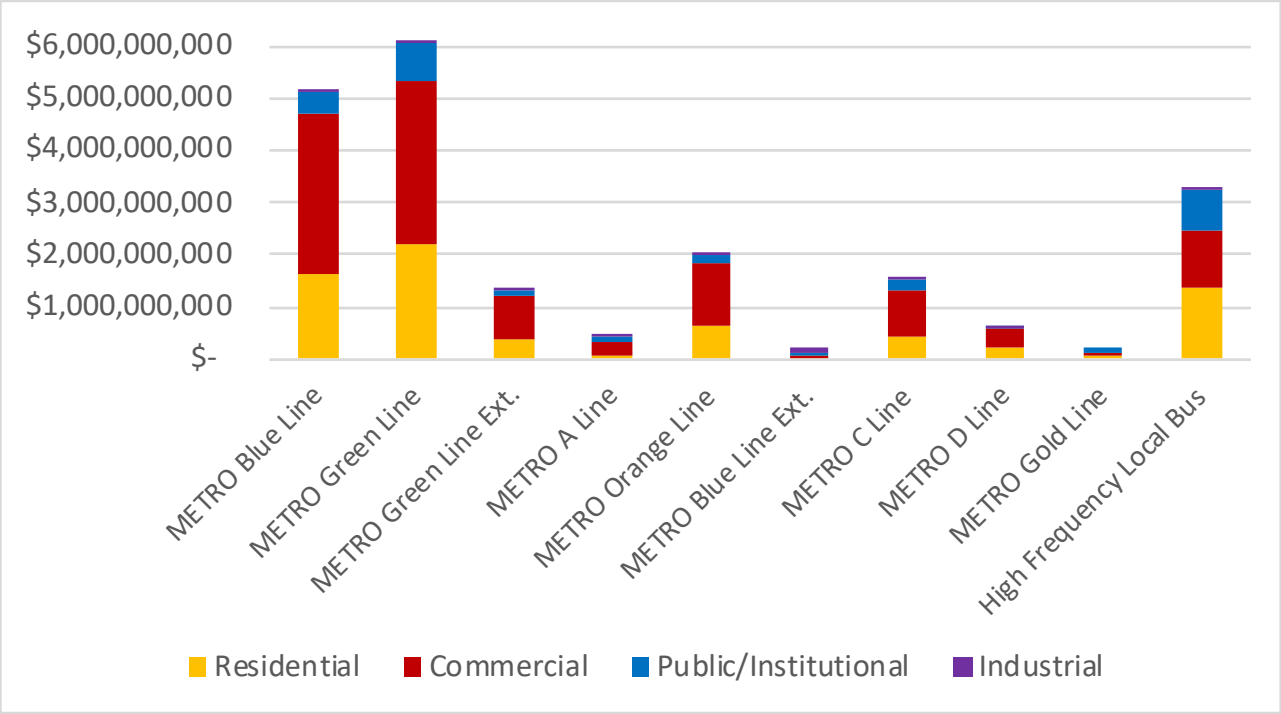


5 Due to the nature of the data, permits are reported for each relevant line – value may be double-counted and should be used only to indicate share by line.

Permitted Development by Transitway and High Frequency Local Bus

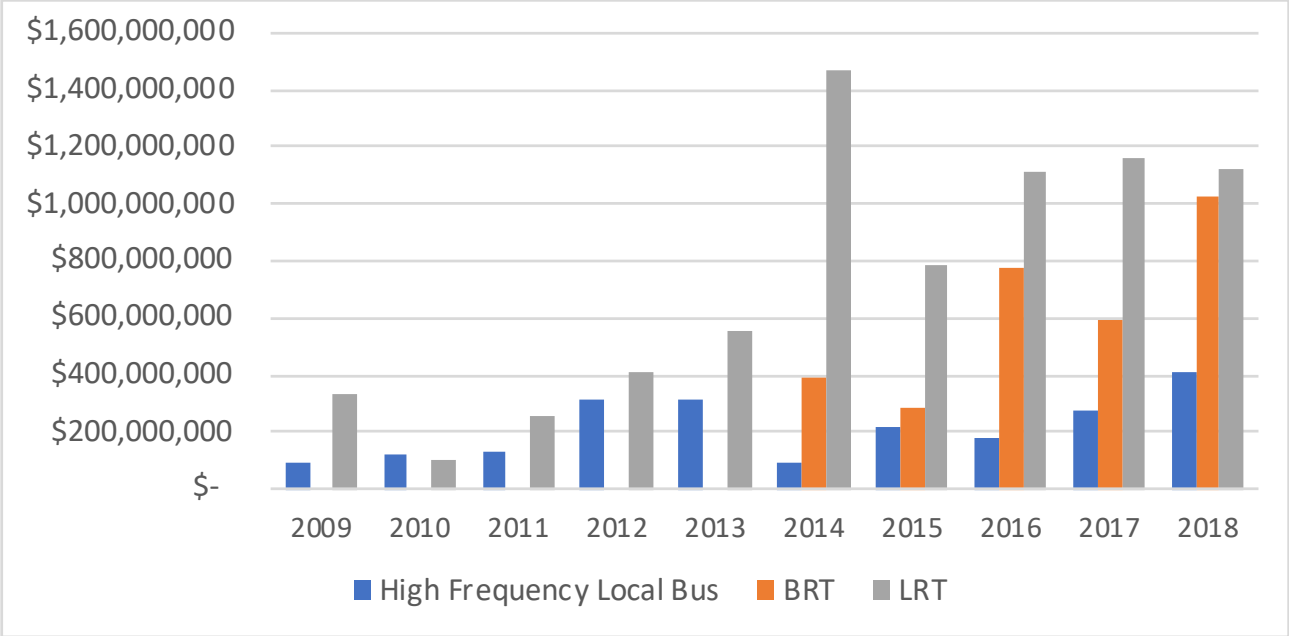
Of the nearly $12 billion in development being permitted near high frequency transit, 68% is served by LRT, 26% by BRT, and 26% by high frequency local bus. The well-established Blue Line and Green Line LRT serve 43% and 51% of development value near transit respectively. As shown in chart 9, commercial 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 2009-2018; Commercial, Public/Institutional, Industrial 2003-2018)[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 includes the nearly $800 million construction of 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 2018.

Chart 11: Share of Downtown Minneapolis High Frequency Transit Permitted Development[7]

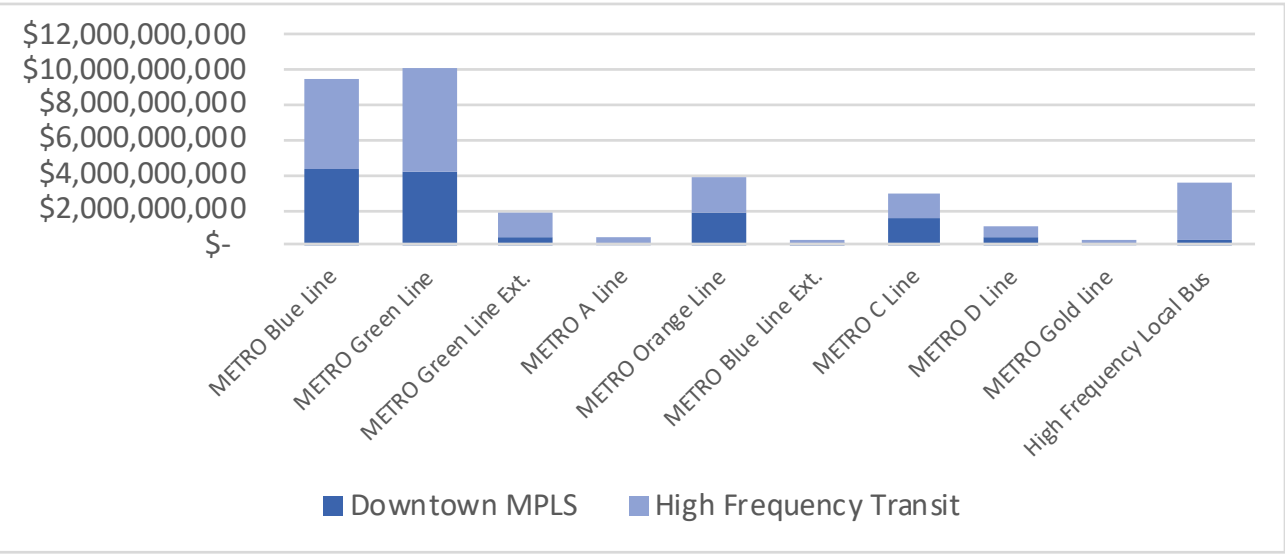


Chart 11 shows the share of development located near high frequency transit contained within the downtown core of Minneapolis. Although other commercial corridors, notably downtown St. Paul and the area around Mall of America, do display concentrations of development activity, the downtown core of Minneapolis is unique within the region for both its transit density and its development. In particular, the section of overlapping Blue Line and Green Line LRT has seen significant development activity and value, while the addition of the C Line and other high frequency transit options to the downtown core continues to support transit oriented development. As other transit lines mature, it is possible that the share of development near transit in downtown Minneapolis will even out, with other lines and other commercial corridors taking on a higher share of the development.

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

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 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 percentages of development have located near high frequency transit:

- Residential: 43.2%
- Commercial: 39%
- Public/Institutional: 29.2%
- Industrial: 7.3%
- Total: 35.4%

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 Saint 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 A).

Chart 12: Development Type near High Frequency Transit by Transit Mode

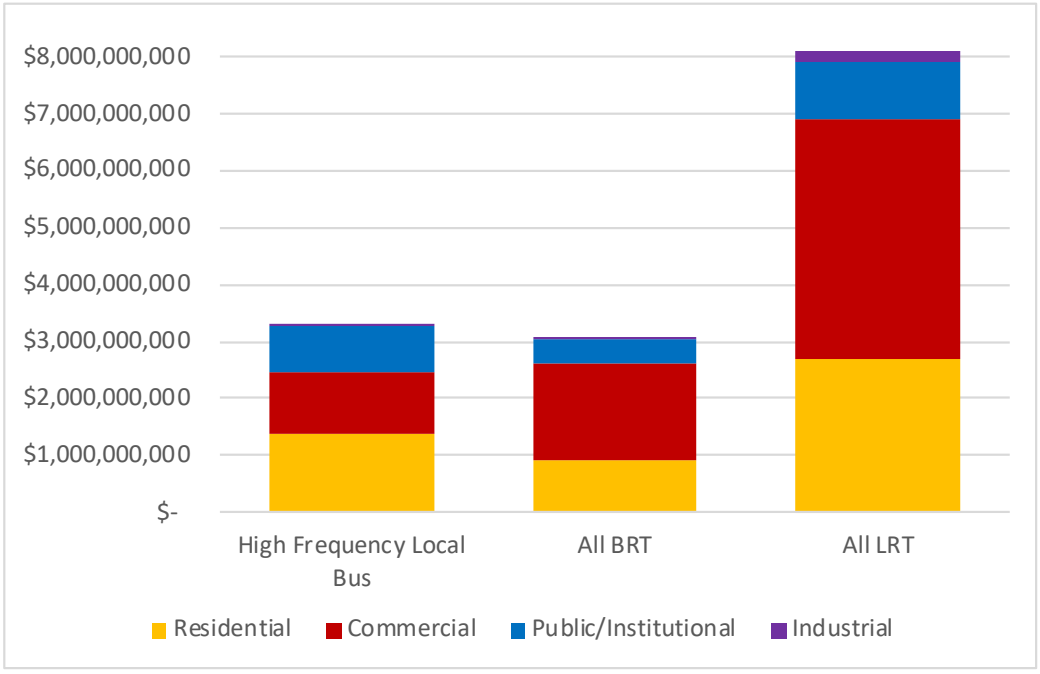


Chart 13: Permitted Development Value occuring near High Frequency Transit over time

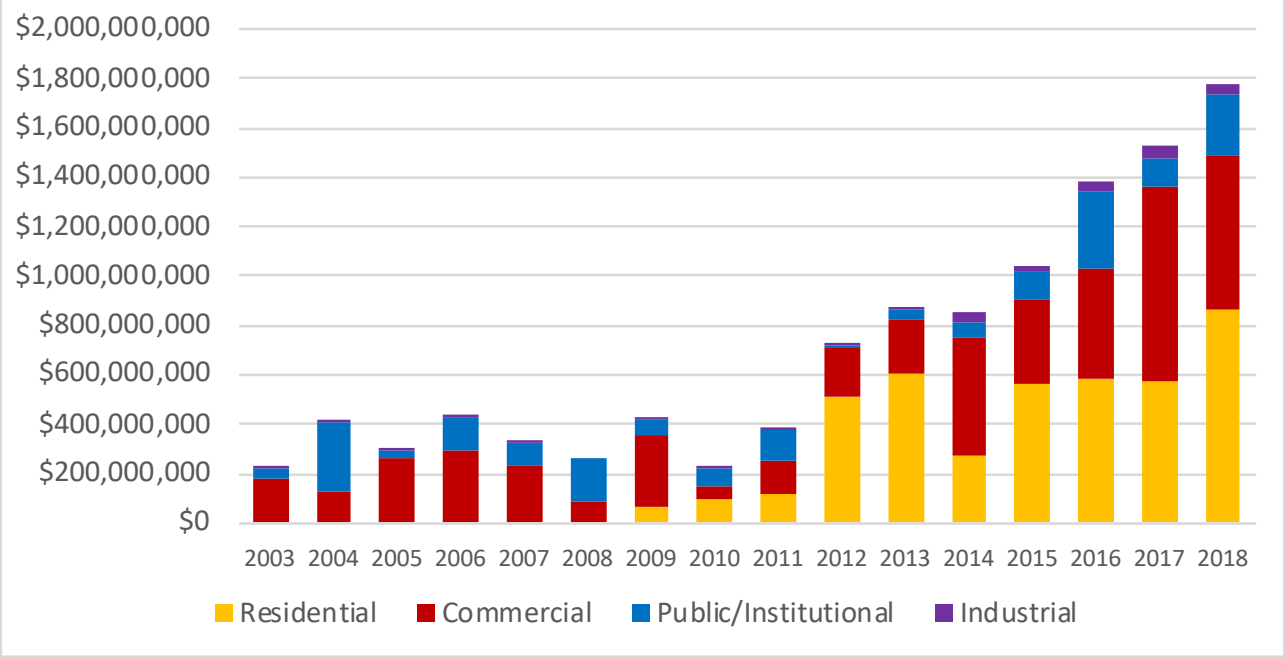


Chart 14: Percentage of Permitted Development near High Frequency Transit (all years)

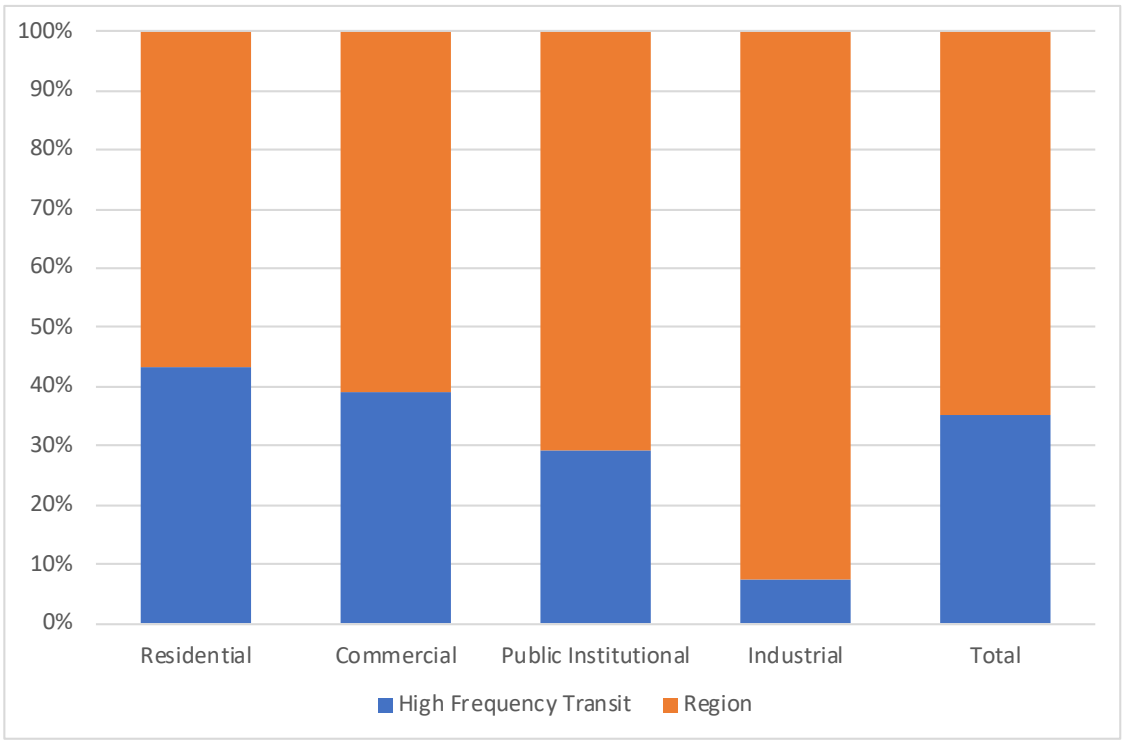
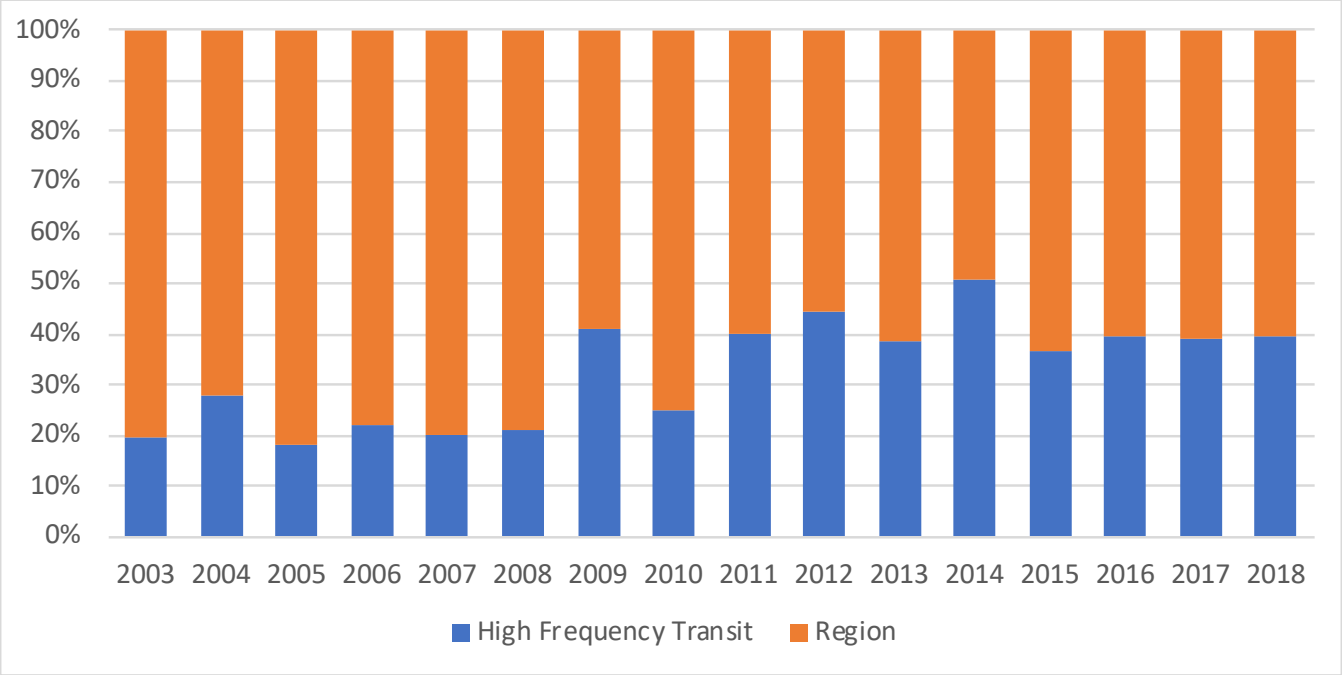


Chart 15: Percentage of Regional Development Served by High Frequency Transit per year



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. Last year 40% 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:

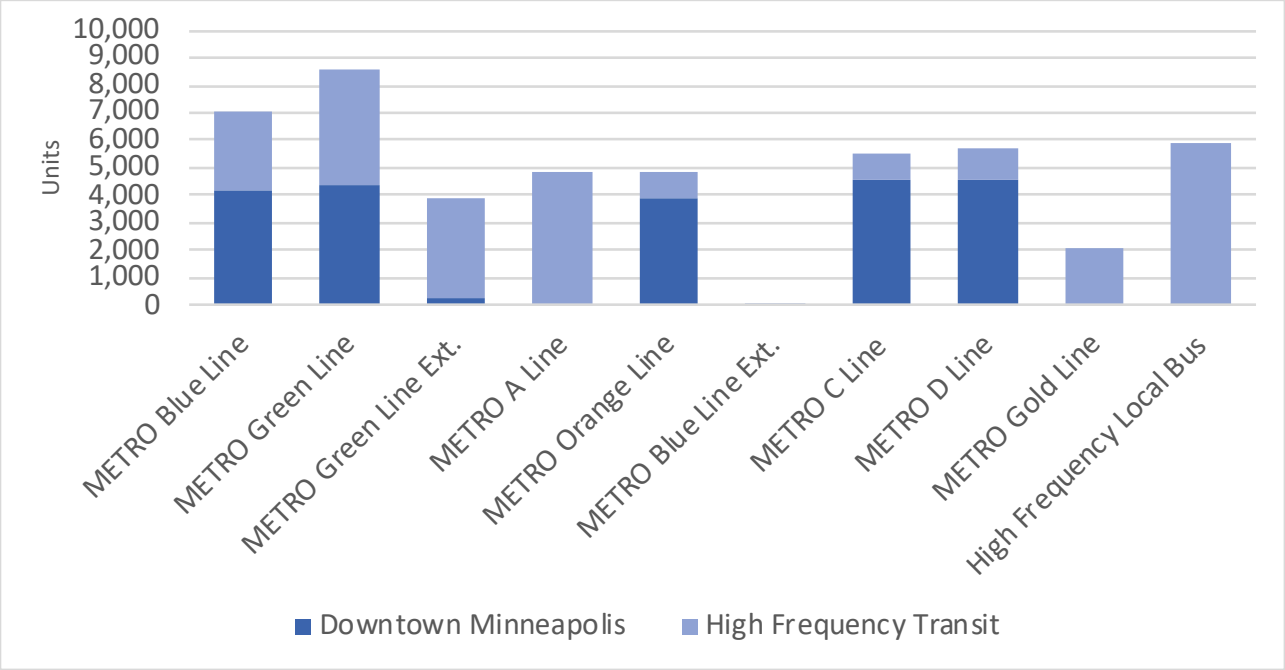
- $8.2 billion in development is planned along high frequency transit. This represents 60% of the development planned in the region.
  - **$5.1 billion** in development near LRT stations
  - **$4.6 billion** in development near BRT stations
- 29.000 multifamily units are currently planned along high frequency transit. This represents 44% of the units planned in the region.
  - **10%** units near LRT stations
  - **4,891** units near BRT stations
  - **8,663** units near high frequency local bus
- Nearly 50% of planned development in the region is mixed use. **80%** of mixed use development is near high frequency transit.
- Roughly 50% of commercial, residential and public and institutional development is planned near high frequency transit.

Planned Multifamily Residential

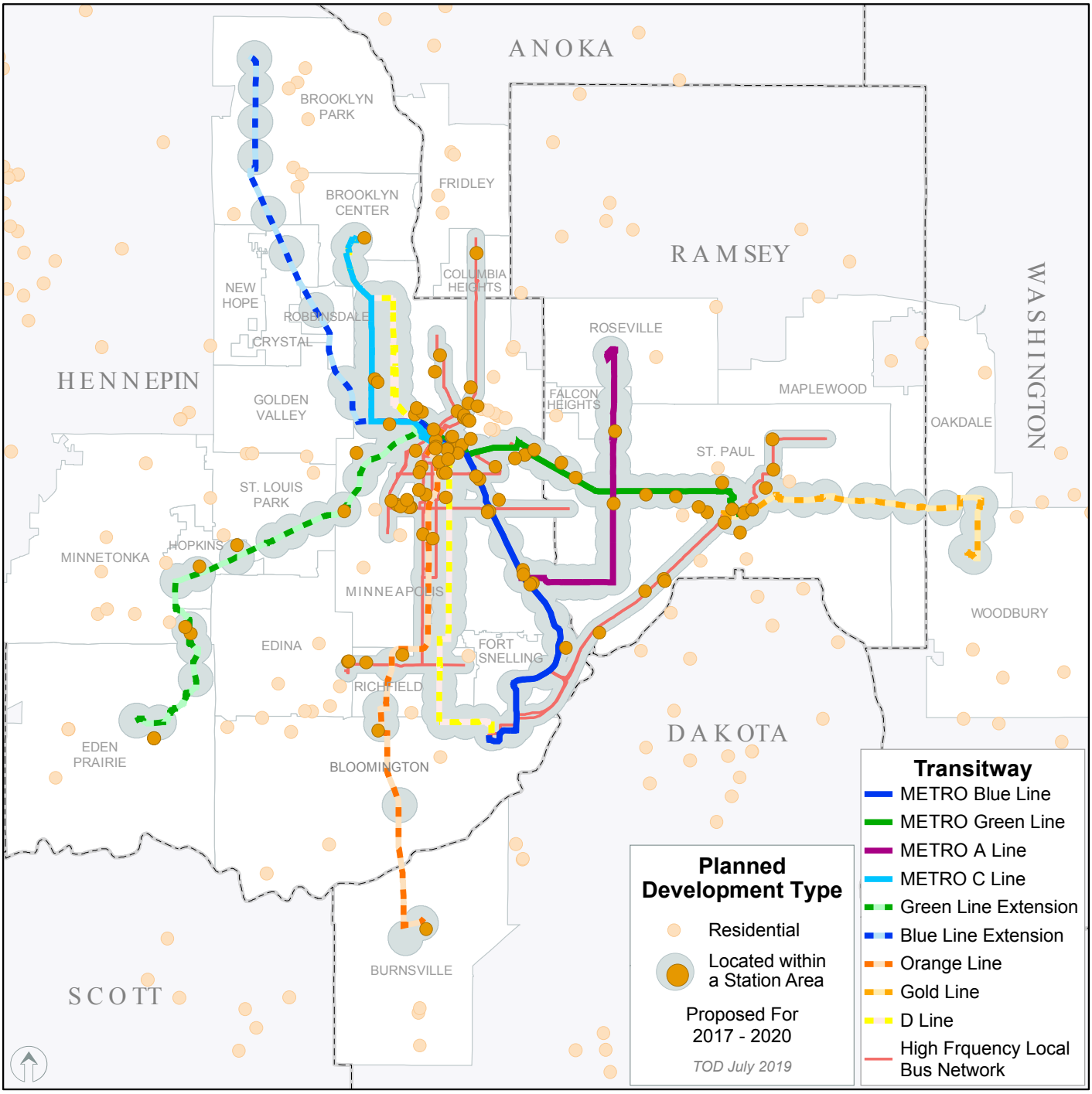
Over 29,000 multifamily units are currently planned along high frequency transit. This represents 44% of the units that are planned for the region. Ten percent of the units planned along high frequency are anticipated to be affordable thus far. 15,000 units are planned near LRT stations and 14,000 units 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.

Chart 16 shows planned multifamily units by transitway. As can be seen 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 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. 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 16: Planned Multifamily Units near High Frequency Transit



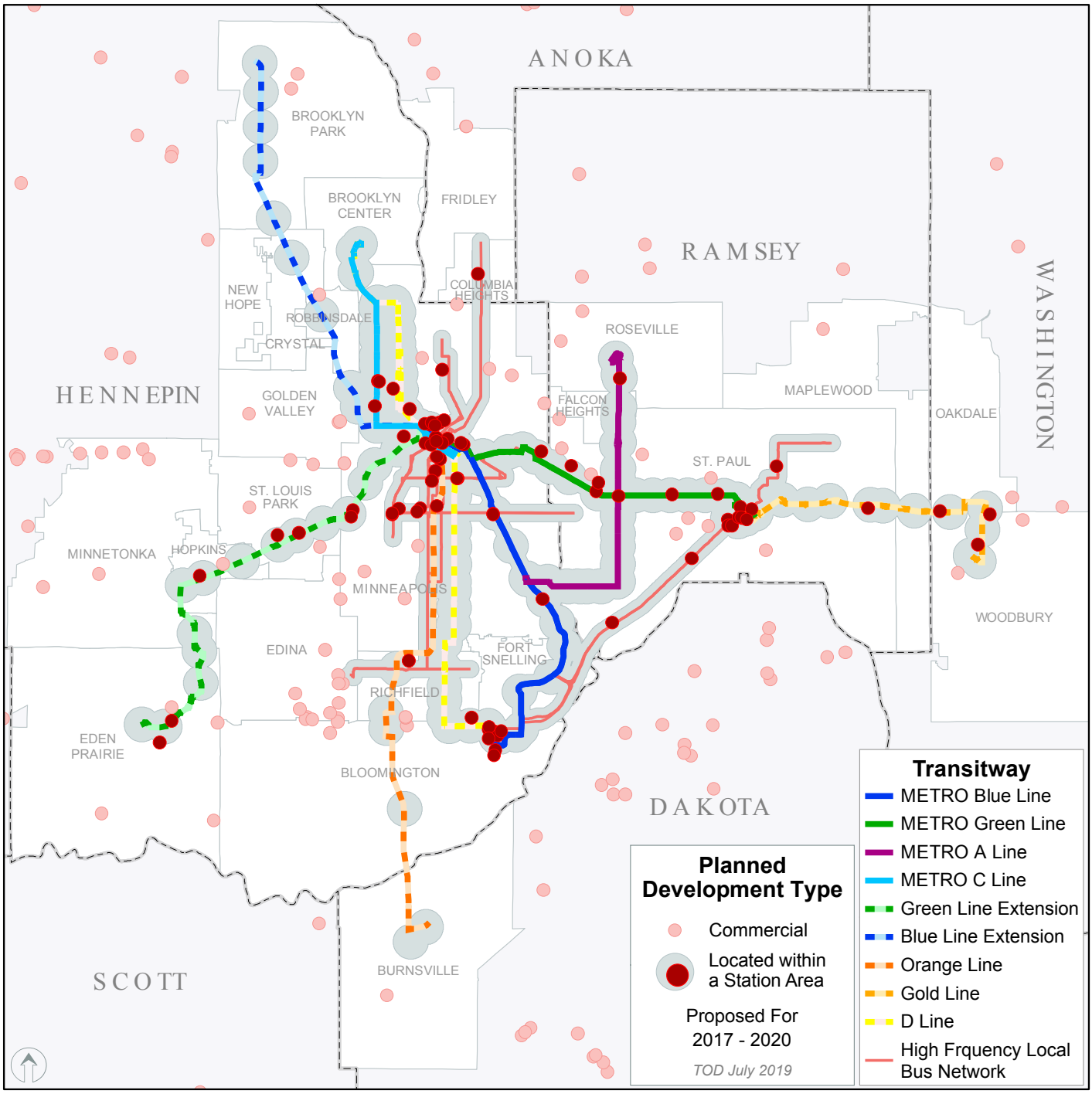
Map 5: Planned Multifamily Development



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 Univerity of Minnesota and in downtown St. Paul.

Commercial

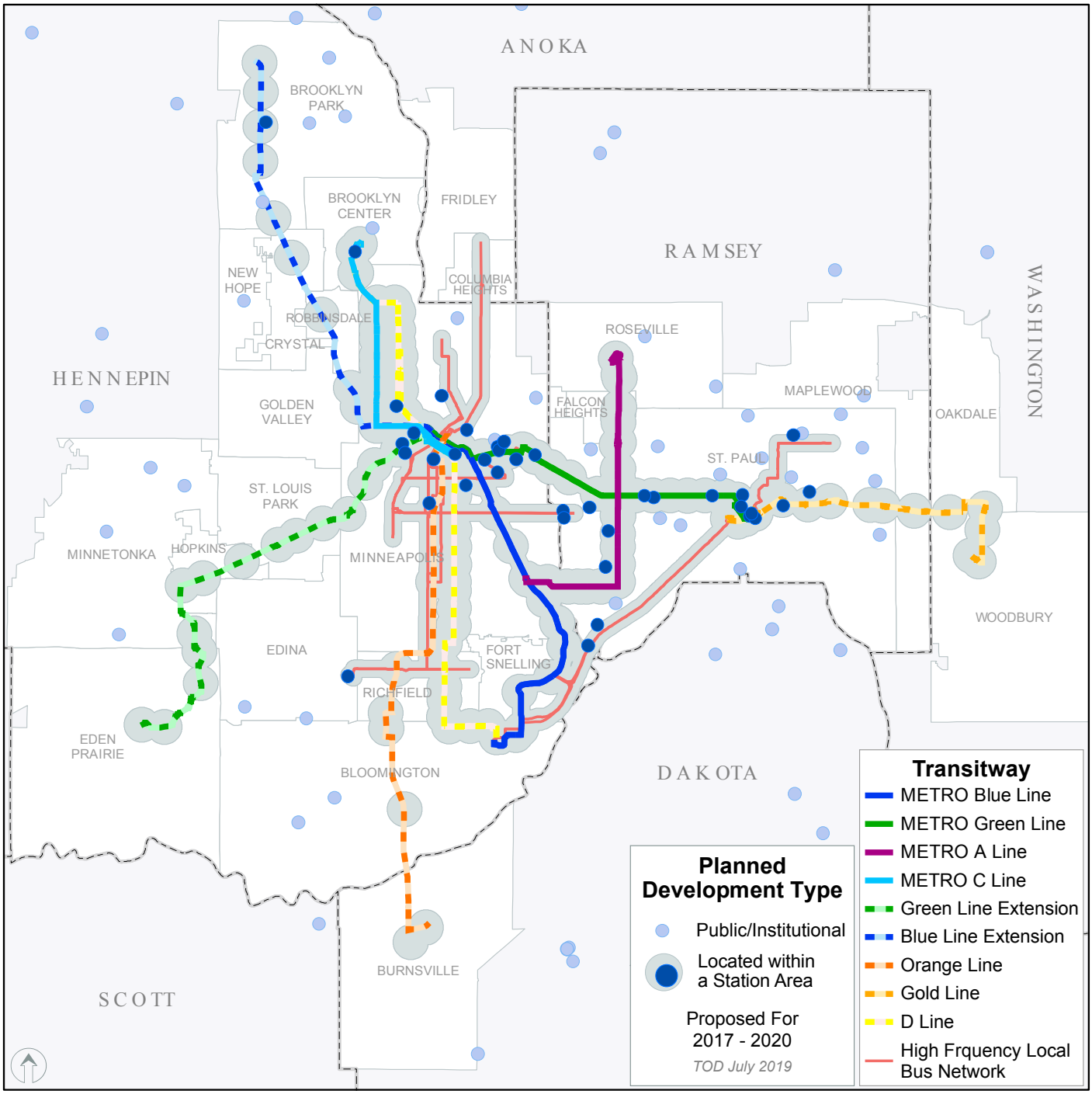
Map 6: Planned Commercial Development



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 the Mall of America.

Public and Institutional

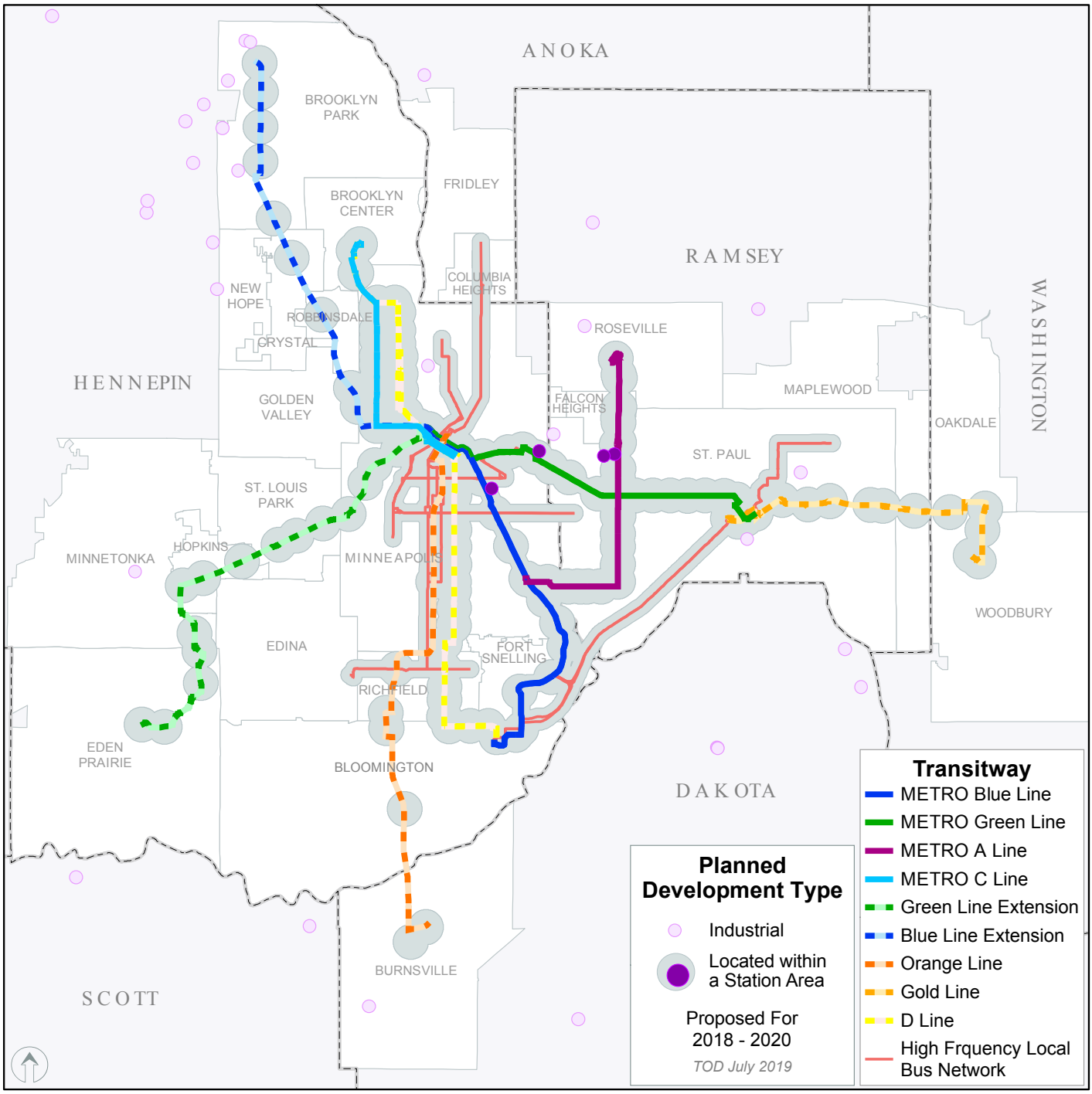
Map 7: Planned Public and Institutional Development



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

Industrial

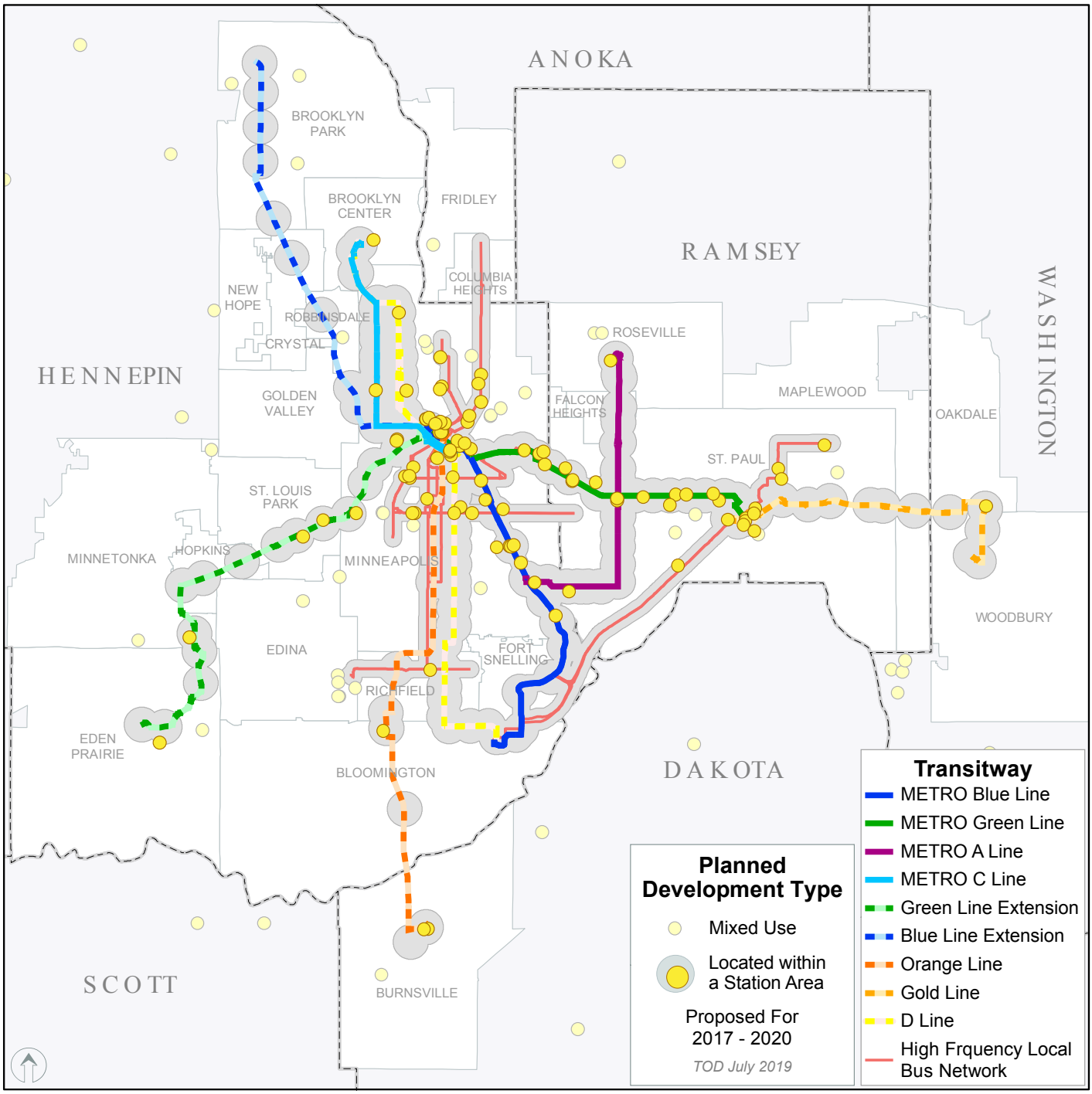
Map 8: Planned Industrial Development



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



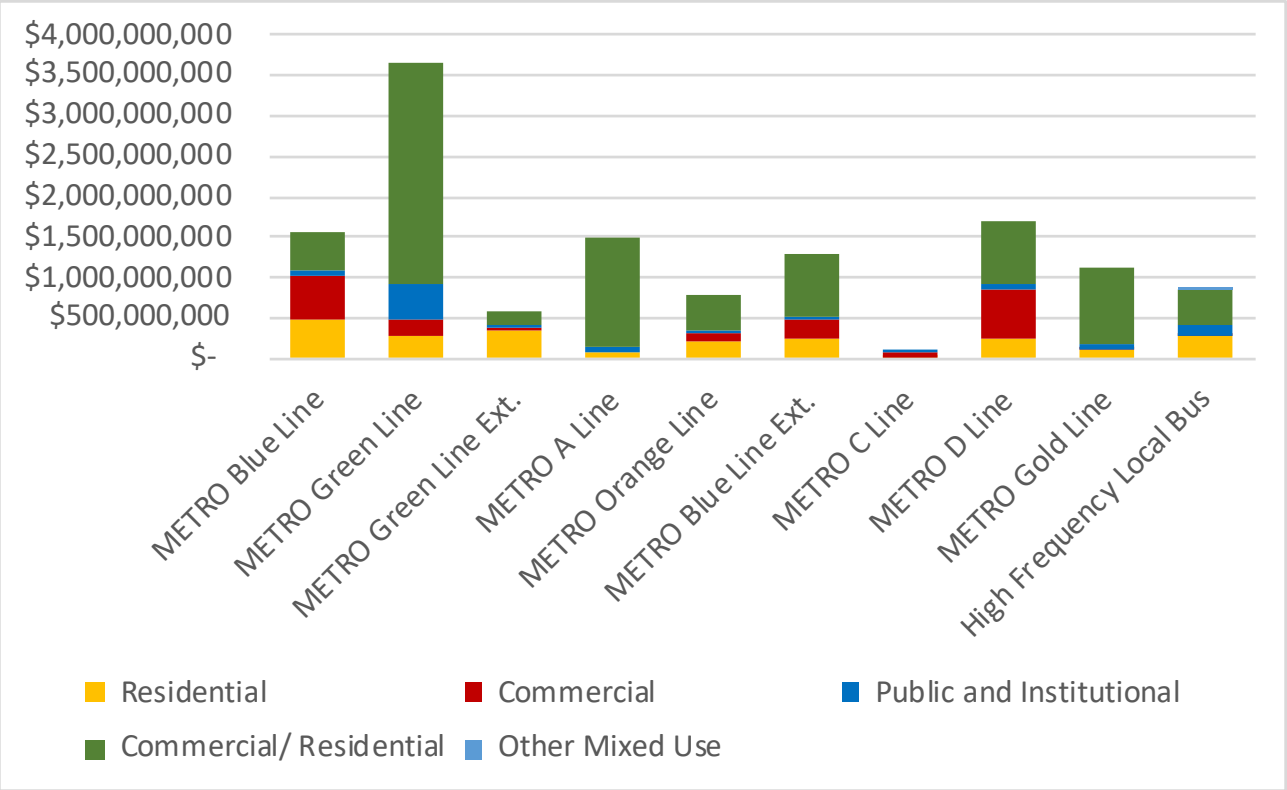
Map 9 shows the locations of planned mixed use development across the region. Over 80% of mixed use development is planned near high frequncy transit. Over 99% of the mixed use development is a blend of commercial and residential development. Mixed use development is not clustered in the same way that 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 Met Council has identified over $12 billion in planned development. Of that, $8 billion (63%) is planned near high frequency transit. $4.8 billion in development is planned near LRT stations. $4.5 billion in development is planned near BRT stations. Some of these developments are planned in areas served by both LRT and BRT.

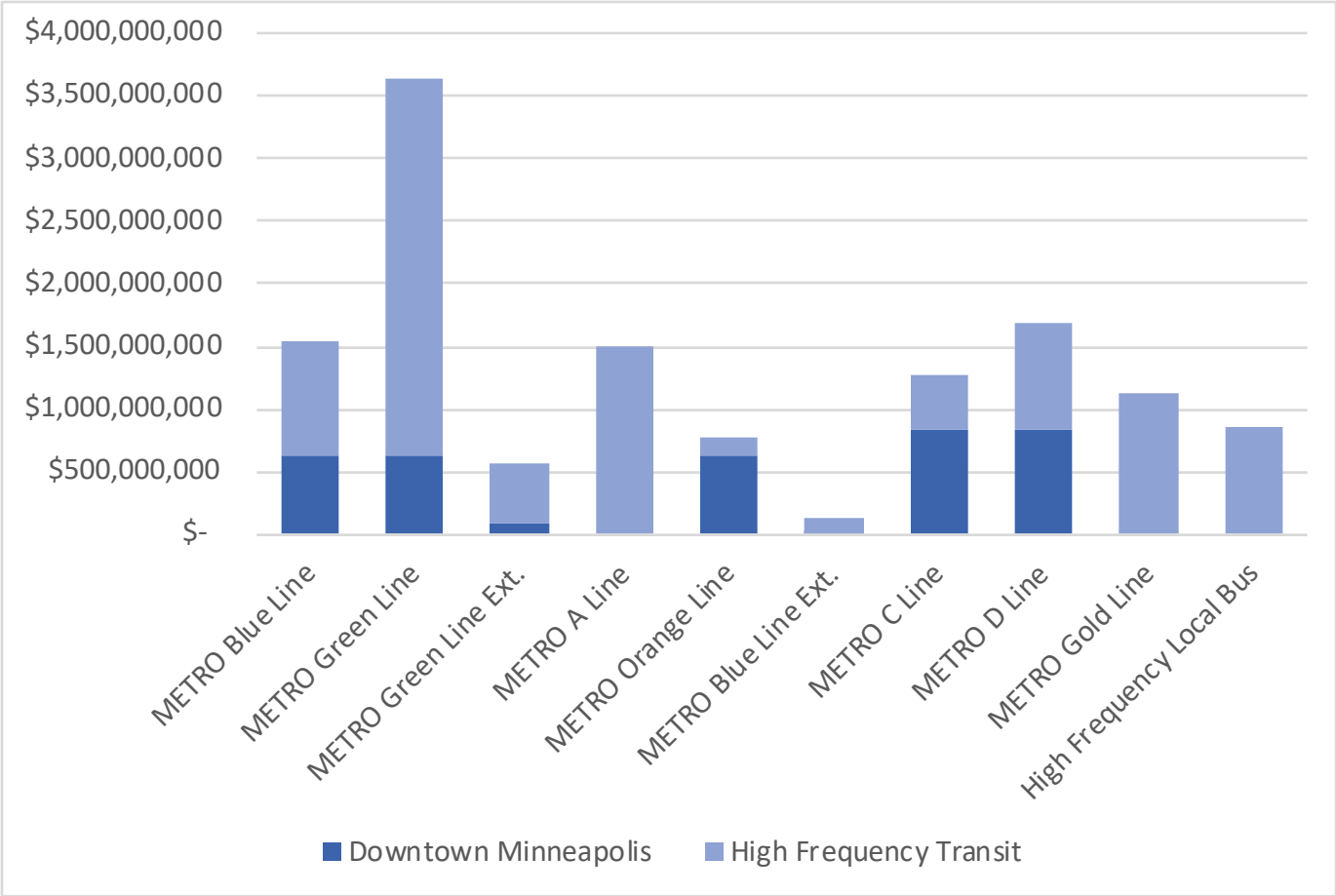
Chart 17 shows the value of development by type that is planned for each transitway. The majority of this development is commercial/residential, which means that it combines commercial and residential uses. Of the planned development, more than $3.5 billion is planned along the Green Line, which is more than twice the development that has been planned along the other transitways. Nonetheless, more than $1 billion each in development has been planned along the A Line, D Line, Gold Line and Blue Line extension.

Chart 17: Value of Planned Development by Transitway[8]



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

Chart 18: Value of Planned Development by Transitway in Downtown[9]



As shown in Chart 18, 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 over $3.5 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.

80% of mixed use development is planned near high frequency transit. Roughly 50% of commercial, residential and 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 4 industrial developments that are planned near high frequency transit, but no estimate of development value is available for these developments.

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

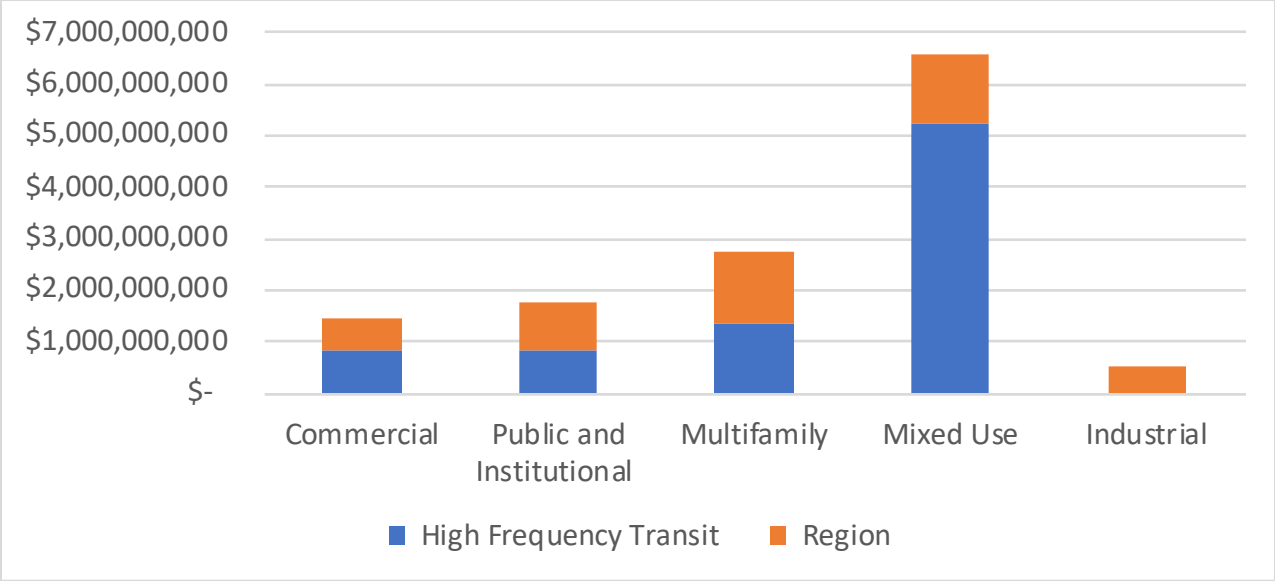
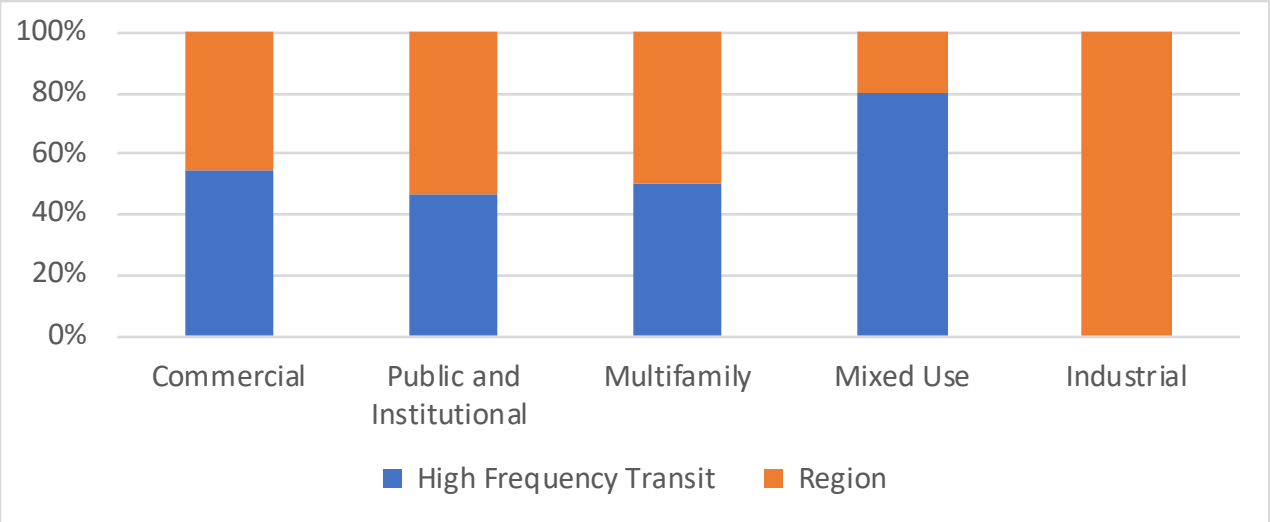


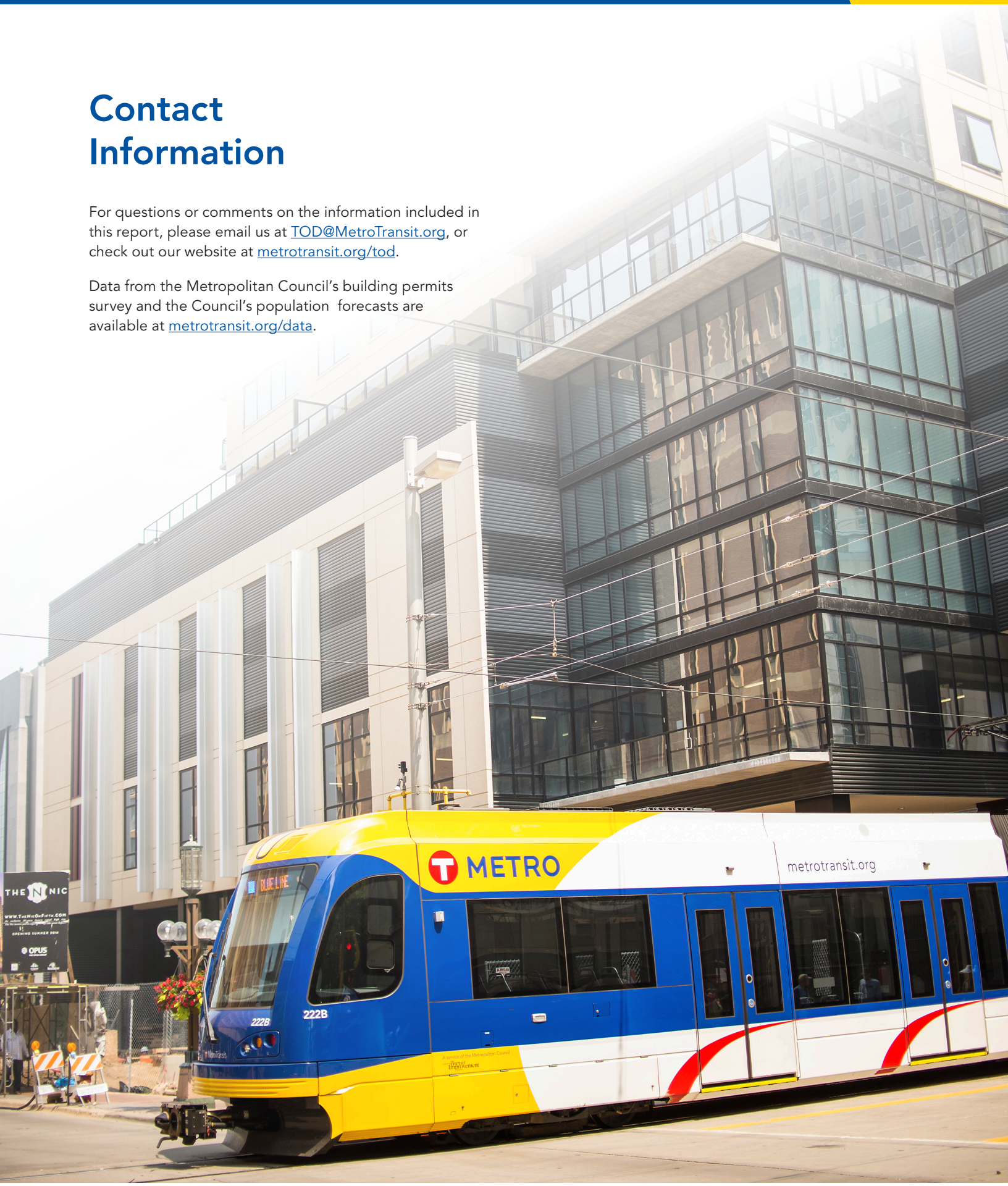
Chart 20: Share of Planned Development near High Frequency Transit by Development Type



Contact Information

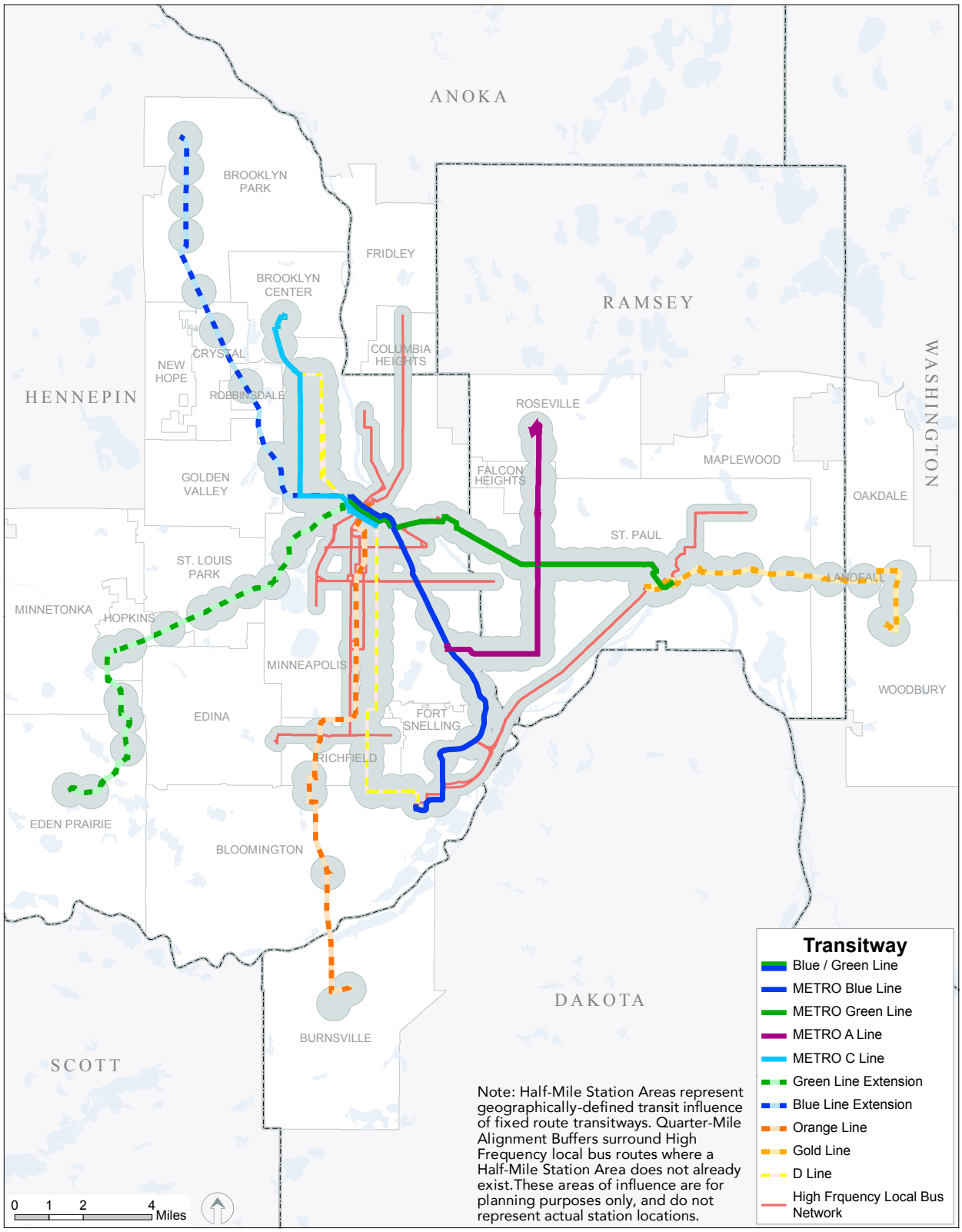
For questions or comments on the information included in this report, please email us at TOD@MetroTransit.org, or check out our website at metrotransit.org/tod.

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

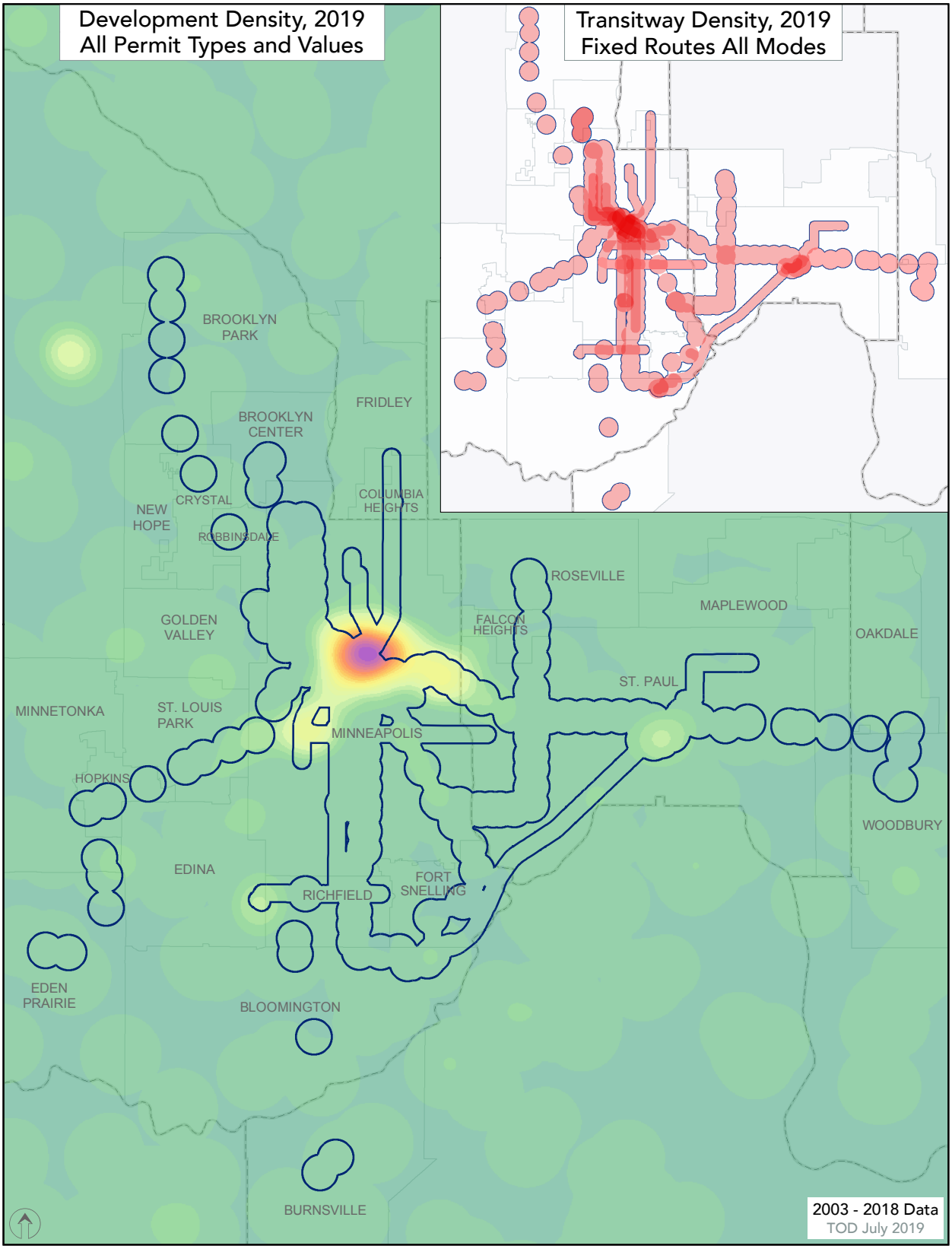


Appendix A – High Frequency Transit Map

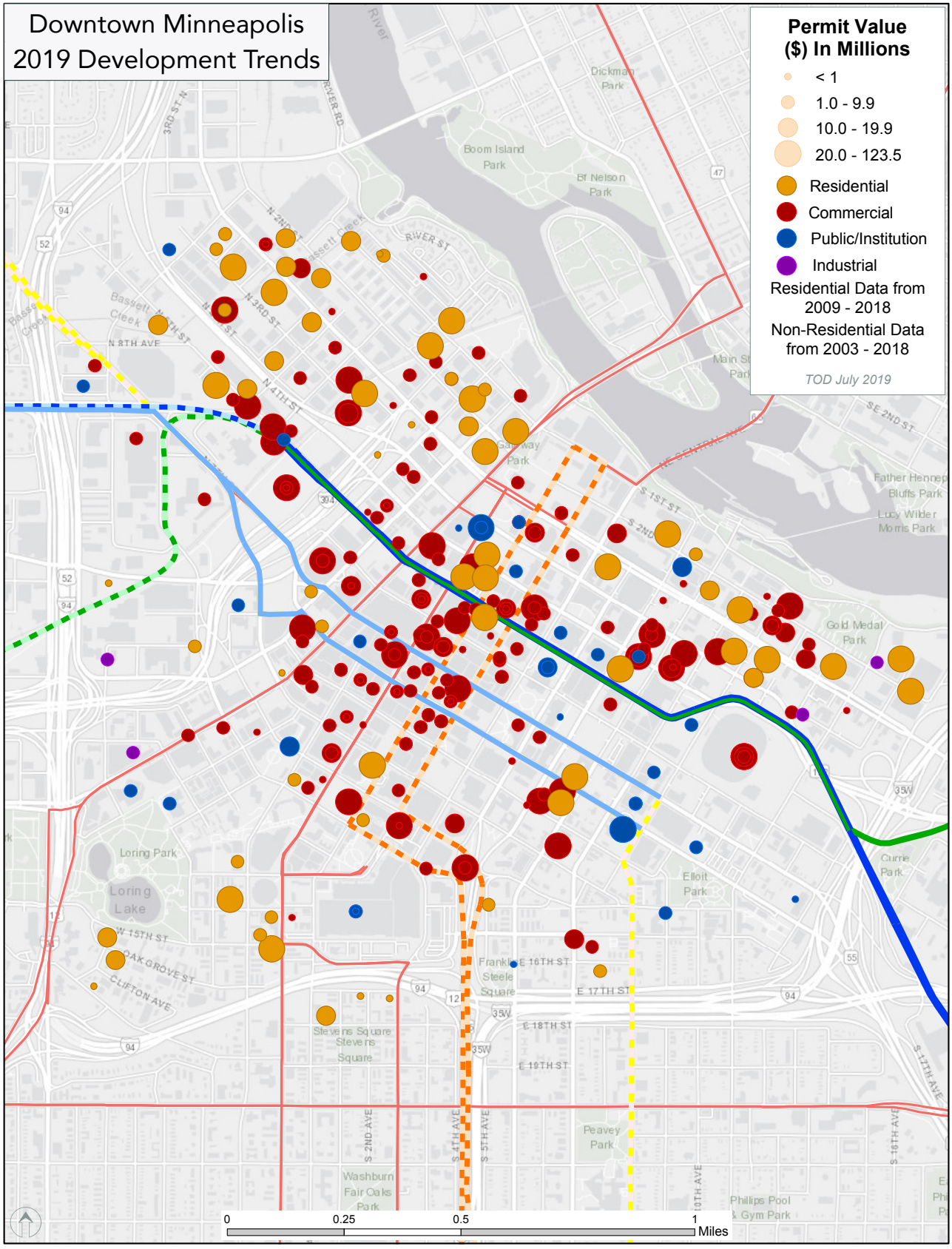
Half-Mile Station Areas and Quarter-Mile Alignment Areas; 2019



Appendix B – Value Density Map



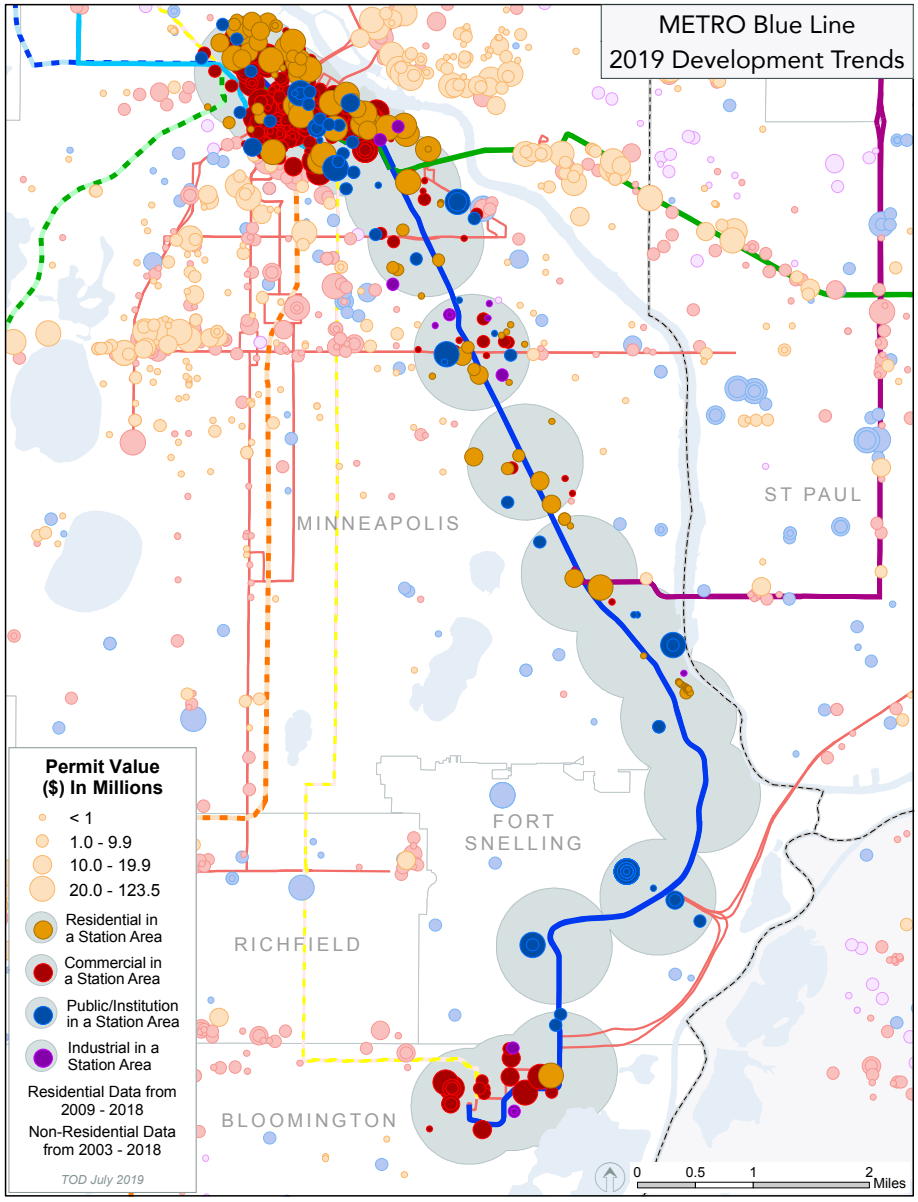
Appendix C – Downtown Minneapolis



Appendix D – Development by Transitway

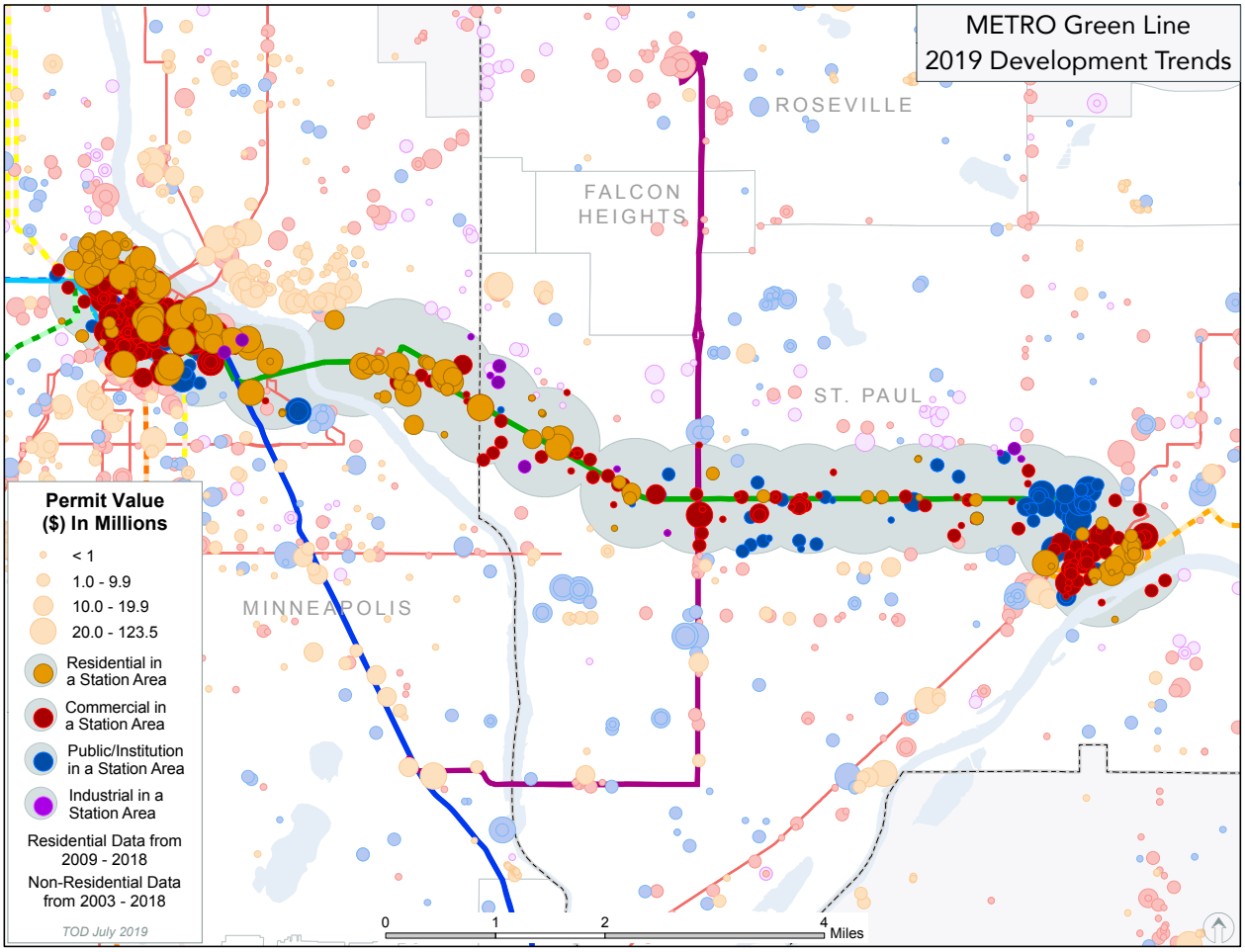
METRO Blue Line

Development Types	Permitted Development	Planned Development
Residential (Units)	9,100	7,000
Residential (Value)	$1,612,000,000	$478,000,000
Commercial (Value)	$2,300,000,000	$562,000,000
Public/Institutional (Value)	$436,000,000	$54,000,000
Industrial	$22,000,000	N/A
Mixed Use (Value)	N/A	$455,000,000
Total (Value)	$4,370,000,000	$1,550,000,000



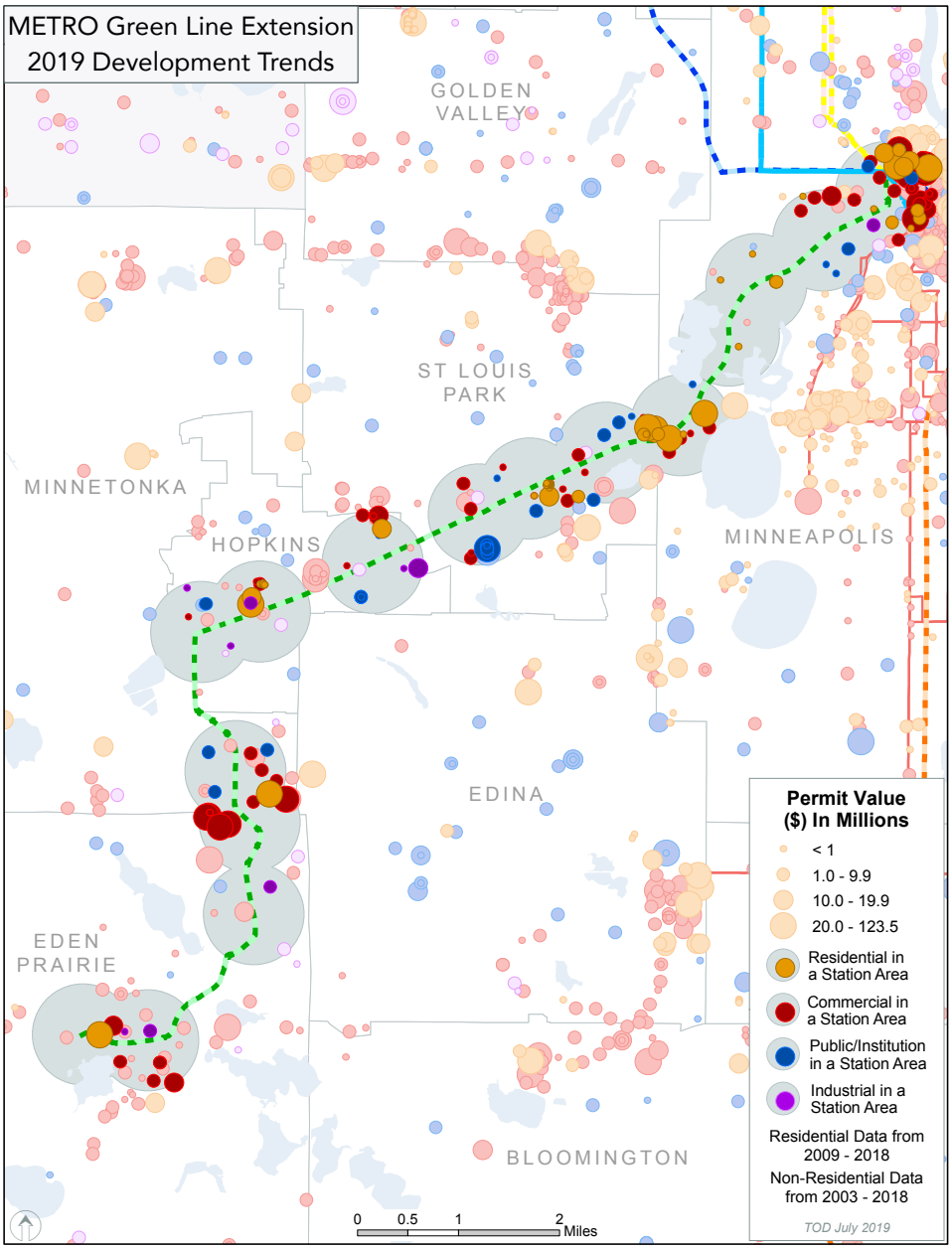
METRO Green Line

Development Types	Permitted Development	Planned Development
Residential (Units)	14,000	8,600
Residential (Value)	$2,182,000,000	$289,000,000
Commercial (Value)	$2,400,000,000	$188,000,000
Public/Institutional (Value)	$729,000,000	$430,00,000
Industrial	$17,000,000	N/A
Mixed Use (Value)	N/A	$2,732,000,000
Total (Value)	$5,328,000,000	$3,638,000,000



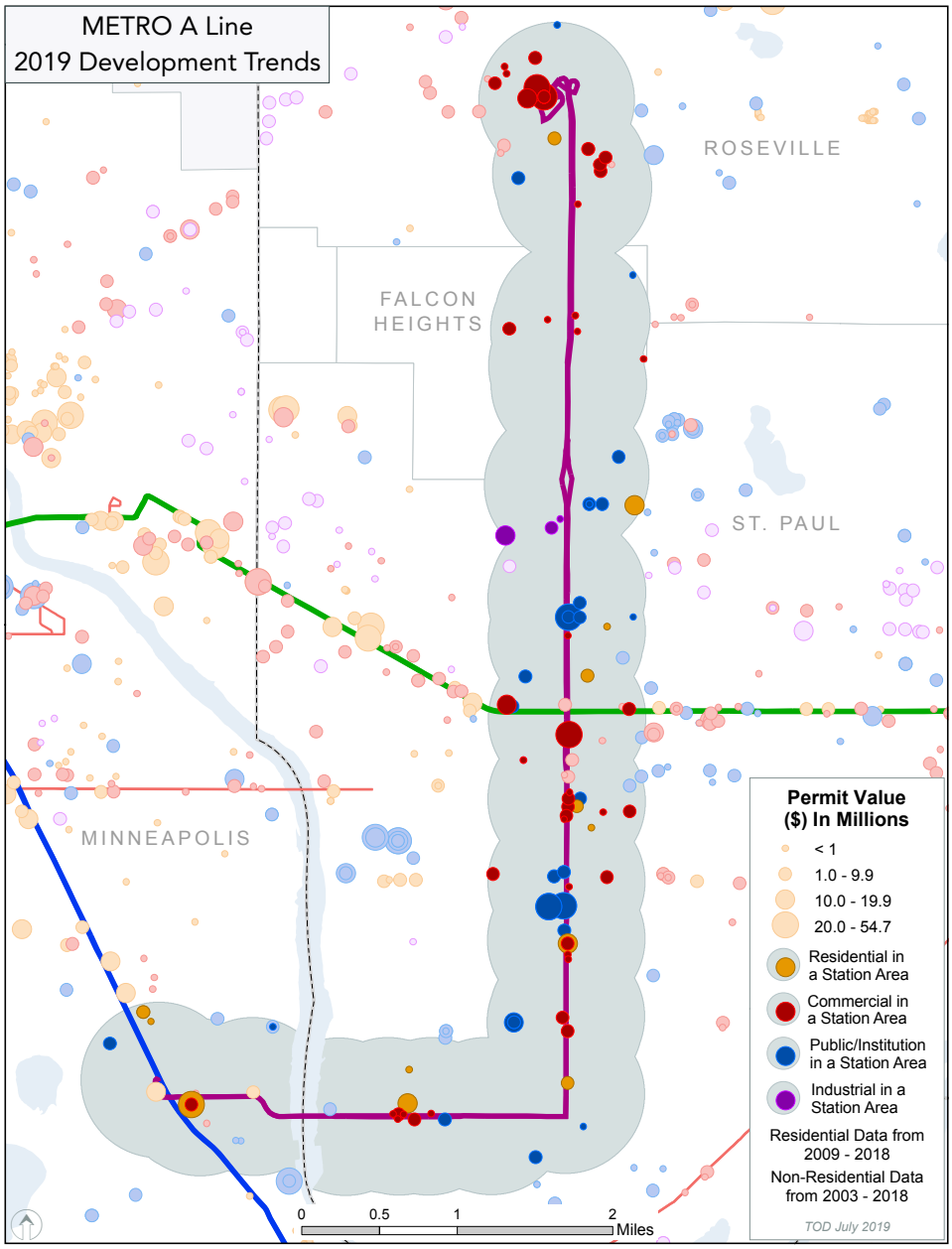
METRO Green Line Extension

Development Types	Permitted Development	Planned Development
Residential (Units)	3,100	3,900
Residential (Value)	$394,000,000	$347,000,000
Commercial (Value)	$800,000,000	$30,000,000
Public/Institutional (Value)	$121,000,000	$51,000,000
Industrial	$32,000,000	N/A
Mixed Use (Value)	N/A	$150,000,000
Total (Value)	$1,347,000,000	$578,000,000



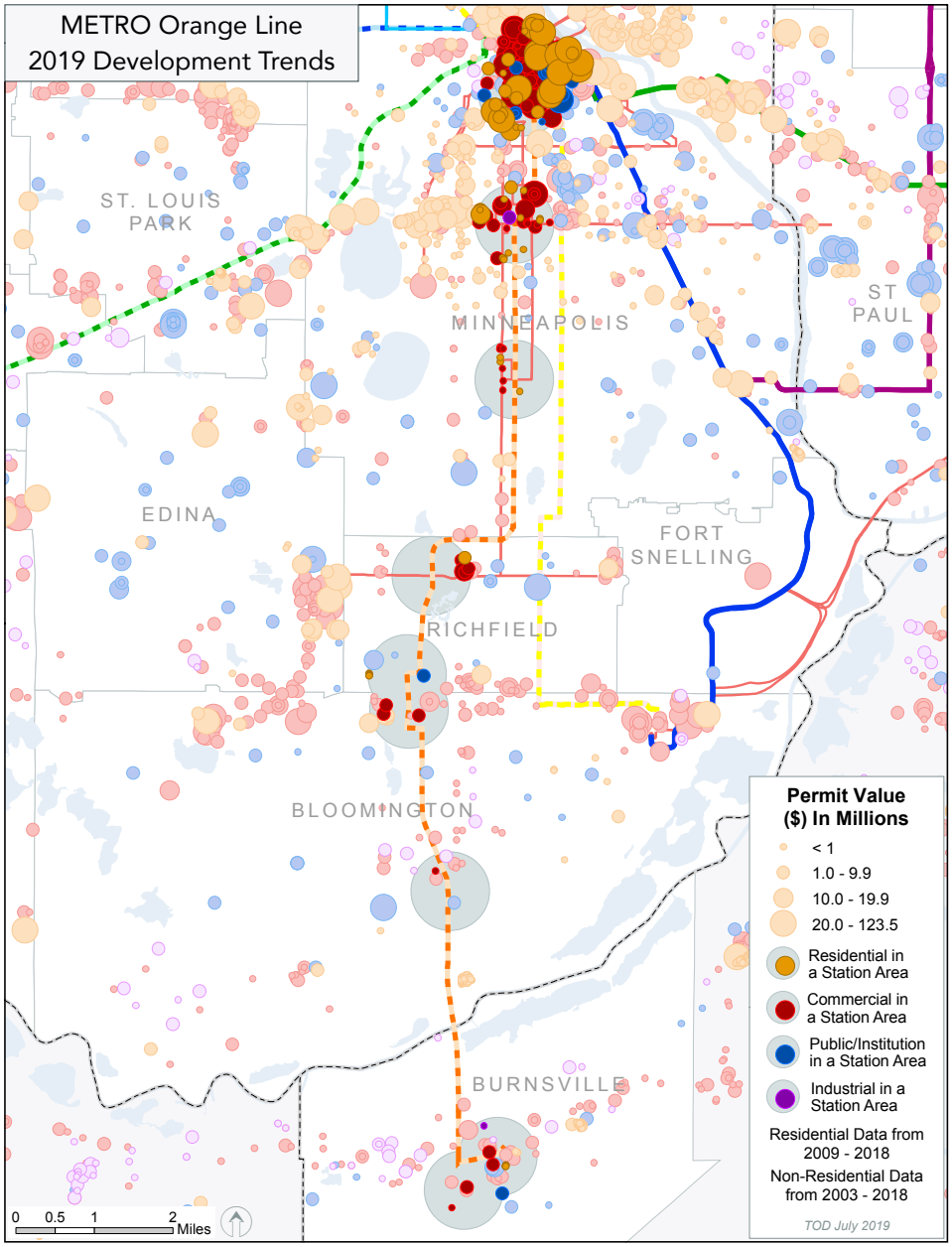
METRO A Line

Development Types	Permitted Development	Planned Development
Residential (Units)	700	4900
Residential (Value)	$82,000,000	$86,000,000
Commercial (Value)	$267,000,000	$0
Public/Institutional (Value)	$89,000,000	$62,000,000
Industrial	$10,300,000	N/A
Mixed Use (Value)	N/A	$1,360,000,000
Total (Value)	$448,300,000	$1,508,000,000



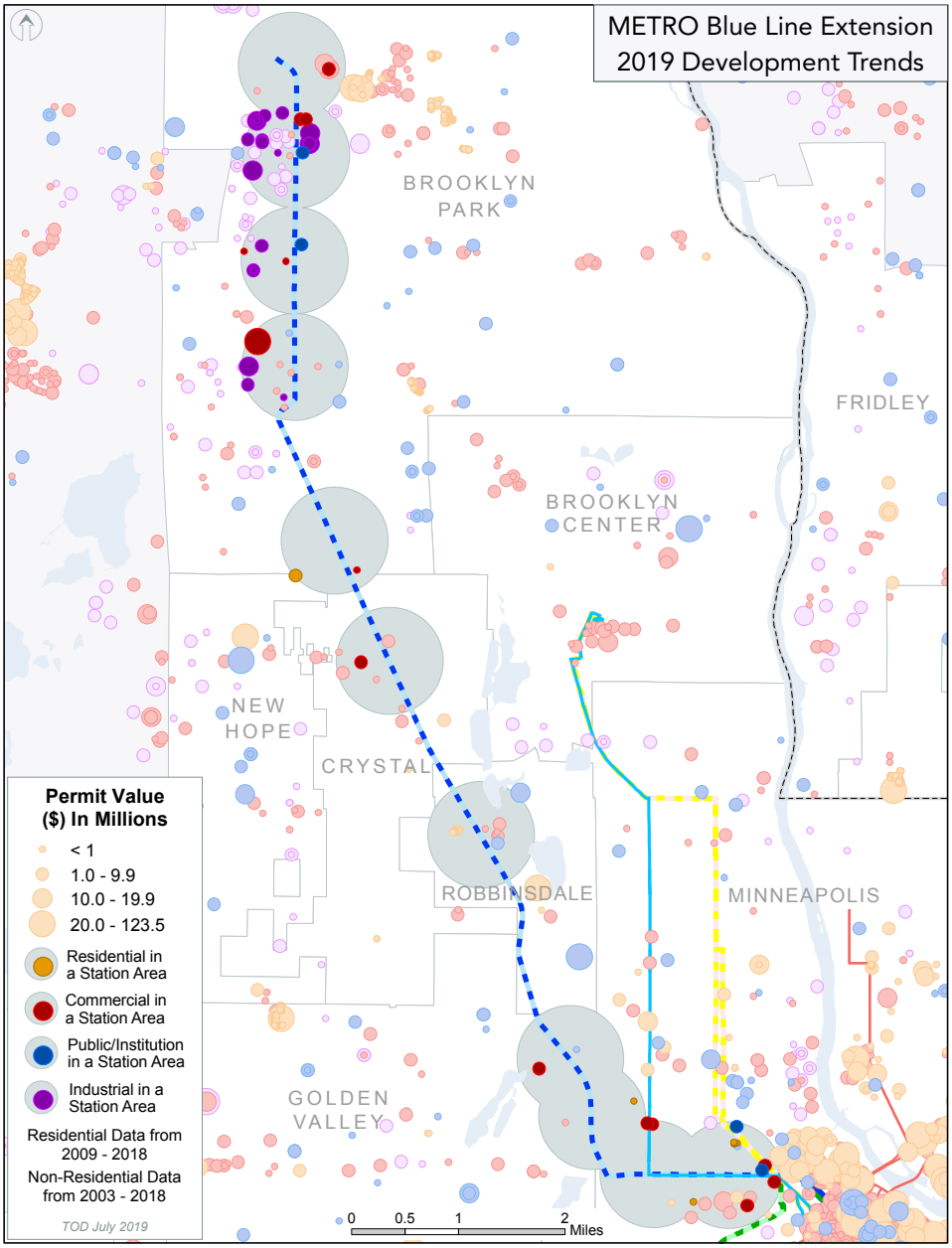
METRO Orange Line

Development Types	Permitted Development	Planned Development
Residential (Units)	3,400	4,800
Residential (Value)	$649,000,000	$209,000,000
Commercial (Value)	$1,168,000,000	$115,000,000
Public/Institutional (Value)	$198,000,000	$20,500,000
Industrial	$7,800,000	N/A
Mixed Use (Value)	N/A	$433,000,000
Total (Value)	$2,022,800,000	$778,000,000



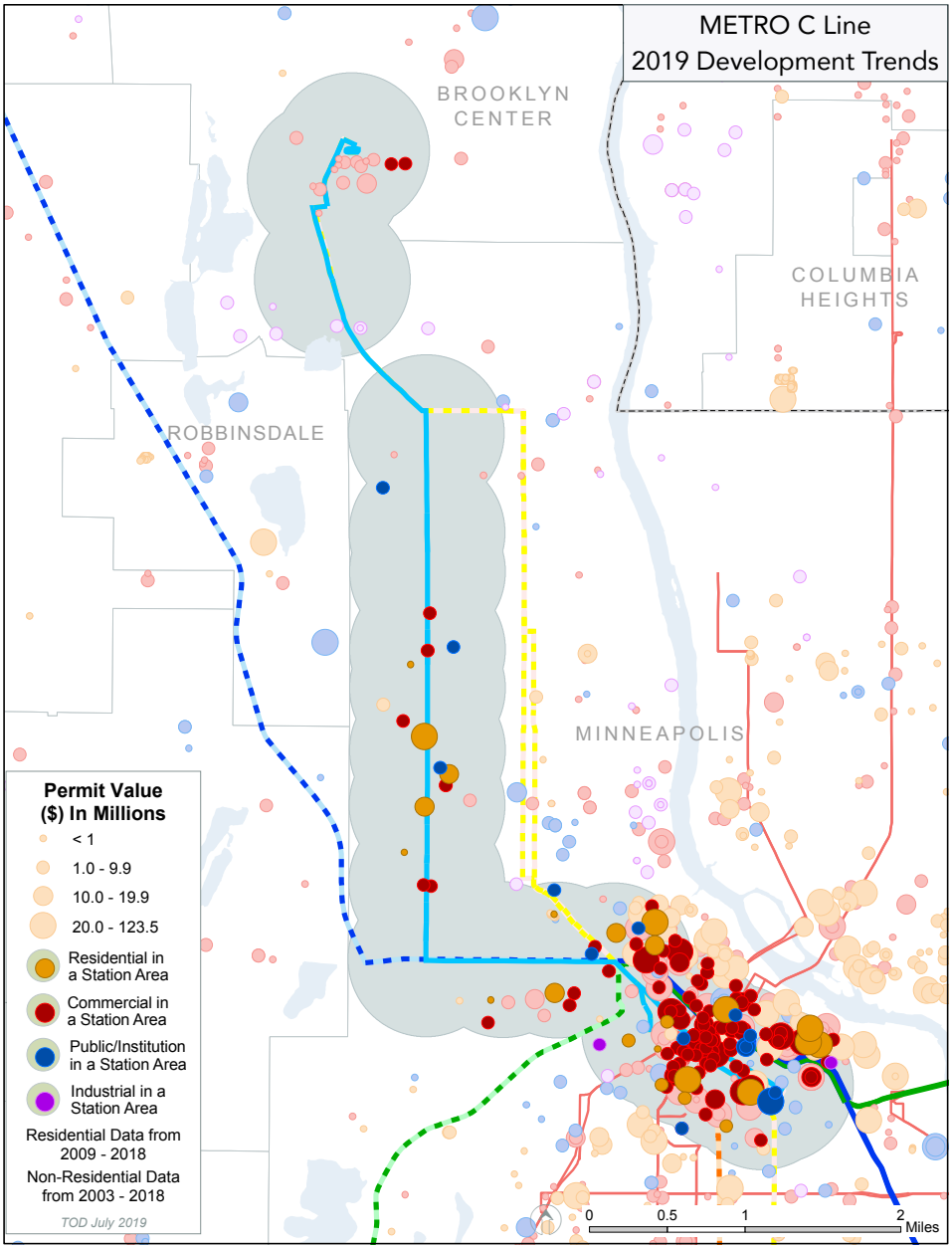
METRO Blue Line Extension

Development Types	Permitted Development	Planned Development
Residential (Units)	83	92
Residential (Value)	$11,370,000	$28,000,000
Commercial (Value)	$73,000,000	$39,000,000
Public/Institutional (Value)	$15,000,000	$59,000,000
Industrial	$128,000,000	N/A
Mixed Use (Value)	N/A	$0
Total (Value)	$227,370,000	$125,000,000



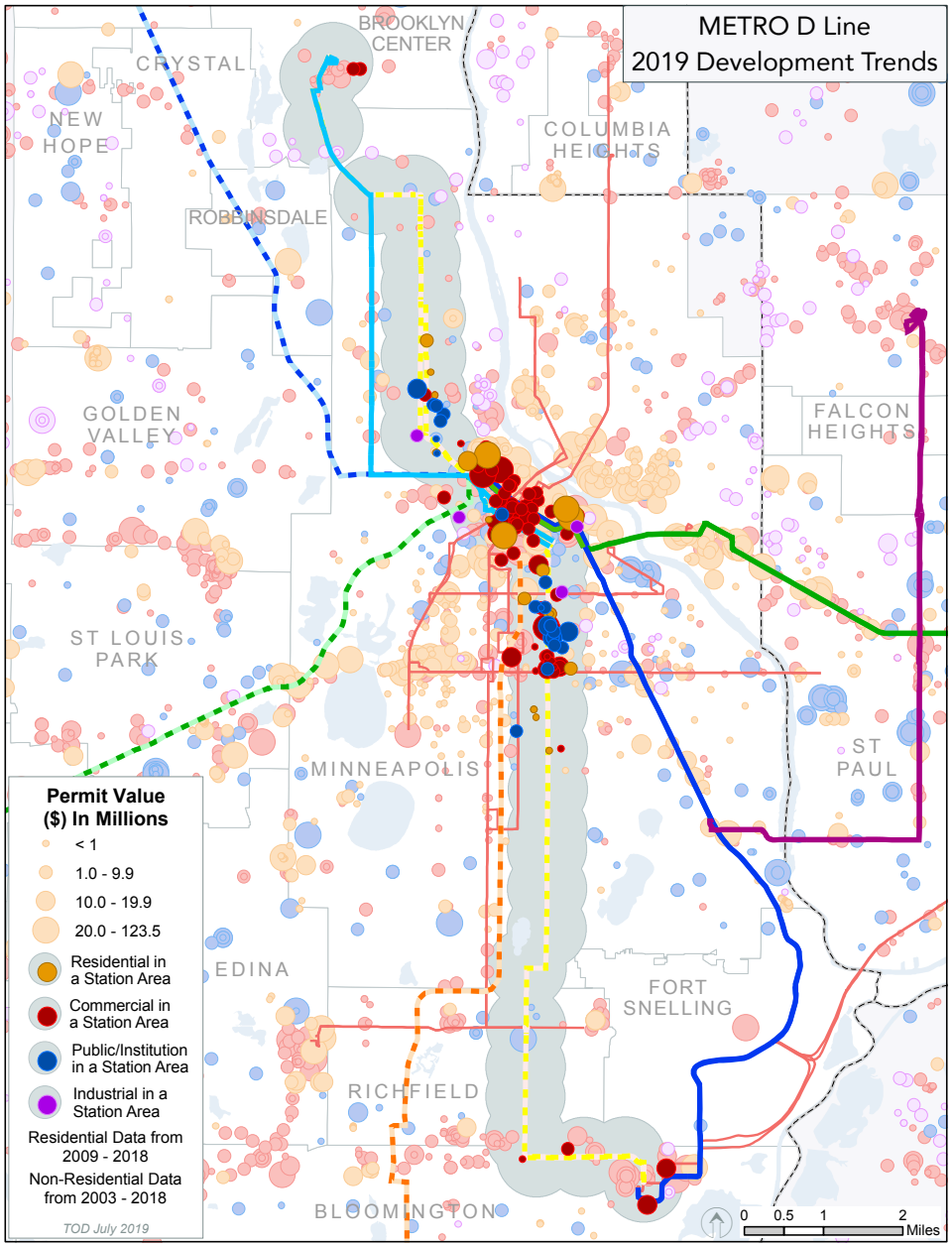
METRO C Line

Development Types	Permitted Development	Planned Development
Residential (Units)	1,900	5,500
Residential (Value)	$429,000,000	$260,000,000
Commercial (Value)	$896,000,000	$232,000,000
Public/Institutional (Value)	$187,000,000	$28,000,000
Industrial	$3,000,000	N/A
Mixed Use (Value)	N/A	$762,000,000
Total (Value)	$1,515,000,000	$1,282,000,000



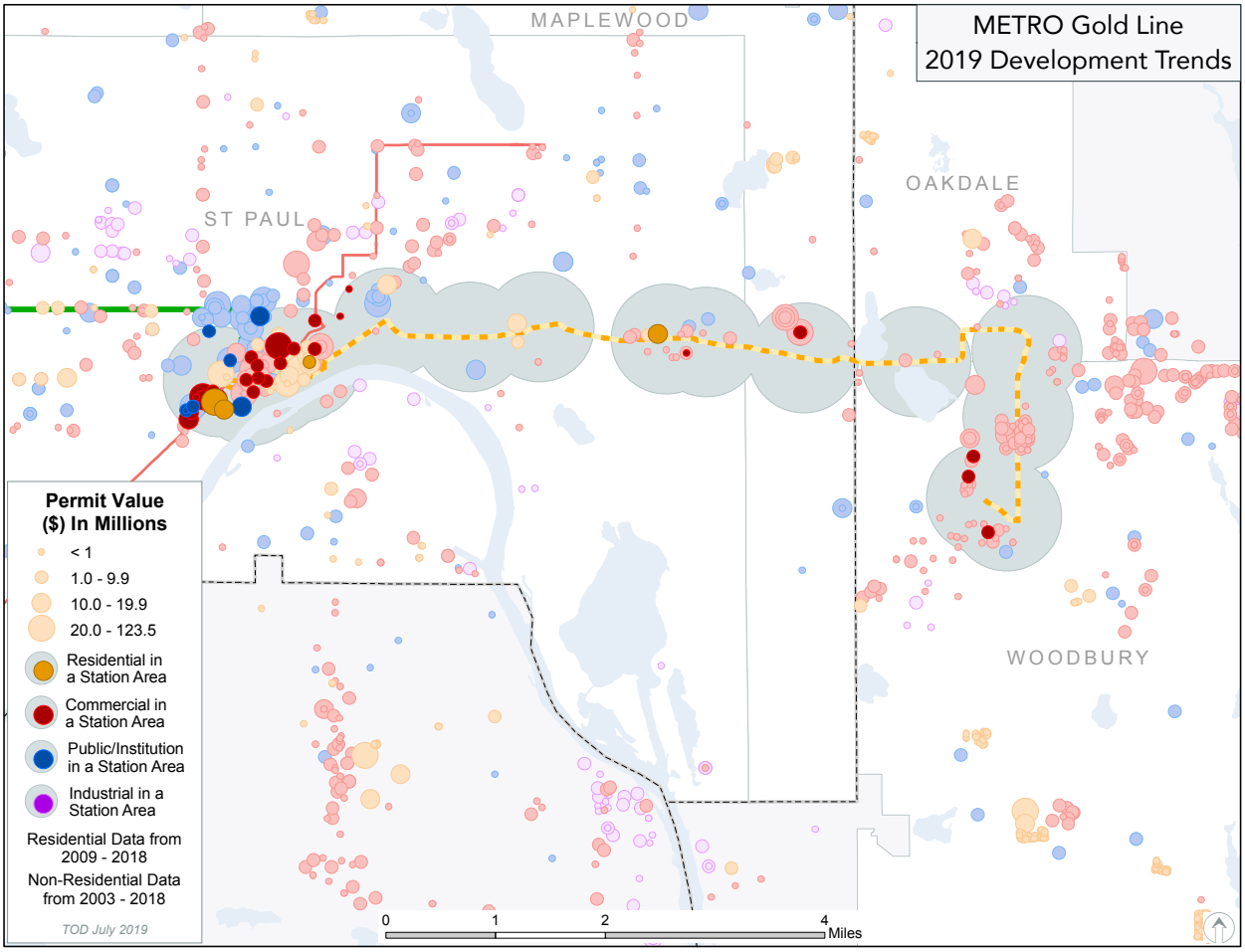
METRO D Line

Development Types	Permitted Development	Planned Development
Residential (Units)	714	5,700
Residential (Value)	$202,000,000	$233,000,000
Commercial (Value)	$367,000,000	$630,000,000
Public/Institutional (Value)	$32,000,000	$68,000,000
Industrial	$3,000,000	N/A
Mixed Use (Value)	N/A	$762,000,000
Total (Value)	$604,000,000	$1,693,000,000



METRO Gold Line

Development Types	Permitted Development	Planned Development
Residential (Units)	340	2,100
Residential (Value)	$41,000,000	$85,000,000
Commercial (Value)	$83,000,000	$25,000,000
Public/Institutional (Value)	$87,000,000	$60,000,000
Industrial	$0	N/A
Mixed Use (Value)	N/A	$959,000,000
Total (Value)	$211,000,000	$1,128,000,000



Notes

Metro Transit