

# Research and Data Services Overview

5/1/2019

Presenting to Committee of the Whole



# Mission and Vision (in development)

## Mission

*We advance a better Twin Cities region for all by delivering trusted, useful information to planners, service providers, policymakers, and our communities.*

## Vision

*We imagine equitable policy, planning, service, and investment decisions at the regional and local level that result in tangible benefits and opportunities for all residents of our region. We see our skills, creativity, and platforms as resources that further shared understanding about regional issues that matter.*

# Research: Informing the Region

- **Forecasts of population, households, and jobs**
  - Inform regional planning, transportation modeling, local comprehensive plans, and more
- **Population estimates (Minn. Stat. 473.24)**
  - Allocate local government aid, local street aid, and calculate fiscal disparities. Also widely used in general research and analysis internally and externally
- **Construction, affordable housing, and land use**
  - Where is new construction occurring (residential and non-residential)? How is the land being used? How much affordable housing is added each year (Minn. Stat. 473.254)

# Research: Informing the Region

- **Parks Research**

- How many people visit the regional parks and trails (Minn. Stats. §§ 85.53 and 473.351)? Who are they? What are the barriers to usage?

- **Climate Research**

- What are the greenhouse gas emissions for the region and communities? What are the most effective planning strategies to reduce emissions and increase resiliency to climate change?

- **Data Science**

- Harnessing vast new sources of data and innovative analytics methods to generate new insights, deliver state-of-the-art online data visualization and apps

# Research: Informing the Region

- **Research on key topics of regional importance**
  - Racial inequities
  - Affordable housing and housing market analysis
  - Demographic and neighborhood change
  - Economic competitiveness
- **More qualitative research**
- **Bringing community wisdom into our work**
- **Connection to action**

# How we share research findings and data

Available at <https://metro council.org/data>

**PLAYFEATURES**  
Research on the Twin Cities Regional Parks & Trails  
July 2018

**2017 Regional Parks System Annual Use Estimate**

**METROSTATS**  
Exploring regional issues that matter  
August 2018

**What a difference a rate makes: population growth, housing production, and vacancy in the Twin Cities region since 2010**

Introduction and key findings

- An estimated 58.3 million visits in 2017, followed by 54.0 million in 2016. Most of this growth was in spring and summer visits.
- One regional park (Above and Beyond) and Minnesota River Greenway were the most visited parks in 2017.
- With over seven million visits, Minneapolis was the most visited city in 2017, followed by St. Paul.

## Reports

**Our findings**

- The region's population is nearing 3.1 million. The region has added almost 225,000 residents since 2010, an increase of 7.9%. There was notable population growth in Urban Center and Suburban Edge communities. In contrast, however, these gains are less impressive: the region's growth is slightly below our peer metros' average.
- The region's housing production has not kept pace with population growth, resulting in a housing production shortfall behind only San Francisco and Atlanta. Recent data show the region's housing production is now on the upswing, but lowering the vacancy rate to "healthy" levels will require a substantial increase in production.
- "Healthy" vacancy rates—often cited as 5%—mean housing costs largely follow inflation. Low vacancy rates can result in rapidly rising rents. With a rental vacancy rate under 5% since late 2014, rents have grown three times faster than if they followed inflation since 2010. This amounts to about \$155 more per month, on average.

**We have more people (and they need housing)**

We estimate the Twin Cities region's total population was 3,075,563 on April 1, 2017, which is about 225,000 more residents than the region had in 2010 (Figure 1). Two-thirds of this population increase has come from "natural growth" (births outpacing deaths), and the remaining third is the result of net migration (more people moved into the region than moved out of it, primarily from outside the U.S.). This population growth translates to 83,100 households added region-wide since 2010. Over the same period, the region added about 63,604 housing units. Taken together, it's clear that the region's overall household growth considerably outpaced its housing production (7.4% versus 5.4%, respectively). As a result, about 20,000 new households occupied units within the existing housing supply, drawing down the region's vacancy rate to record lows.

So what does this growth mean for the Twin Cities region? We explore the implications in the following pages.

**FIGURE 1. 2017 POPULATION ESTIMATES**

	Census April 1, 2010	Estimated April 1, 2017	Change 2010-2017	Percent change 2010-2017
Population	2,849,567	3,075,563	225,996	7.9%
Households	1,117,749	1,200,840	83,091	7.4%
Housing units	1,186,986	1,250,590	63,604	5.4%

**REGIONAL PARKS TRAFFIC PATTERNS**

**COMMUNITY PROFILES**

Community Profile for Hennepin County

Each chart in the Community Profiles can be saved in JPEG, PNG or PDF formats or printed as a standalone page. To save as an image, right-click on the chart and select a format option. Once the "capturing data" process is over, review the saved charts on the CHART EXPORTS tab. Click the "save" button for any chart export listing you wish to save. Please note that the data source is not included in the export.

Please Contact Us by Clicking Here

Select another area:  
Hennepin County

OVERVIEW PEOPLE ECONOMY AND JOB HOUSING

Housing Type  
Housing Units Permitted  
New Affordable Housing

**VISUALIZING REGIONAL RACIAL DISPARITIES**

Exploring economic disparities by race and ethnicity in U.S. metros

The Community Development Research team has produced an annual analysis of disparities by race and ethnicity on key economic measures since 2013. The findings of this research are largely consistent: While the 16-county Twin Cities metro area continues to rank highly among other U.S. metros for our impressive employment and homeownership rates and low poverty rate. However, the Twin Cities metro also has the nation's largest disparities between white residents and residents of color in these measures.

Despite gains for some groups on some measures, there have been no notable changes in this overall pattern. This underscores the persistence of racial and ethnic disparities in the Twin Cities metro, and their potential to further

## Interactive, online tools and dashboards

**TRENDS BY RACE & ETHNICITY**

Despite gains for some groups on some measures, most metros show disparities between white residents and residents of color in these four economic measures.

Notice that gaps differ by metro, by group, and by measure.

**Employment rate**

**Homeownership rate**

**METROPOLITAN COUNCIL**

# Our services: reach out to us!

- Self-service data tools
- Data tutorials and workshops
- Custom data requests
- Custom research requests
- Email [research@metc.state.mn.us](mailto:research@metc.state.mn.us)

# Community Profiles

- Access key information and trends about the Twin Cities region or any city, county, or township
- Data on population, employment, income and poverty, housing, commuting, land use, and development
- Great resource today, and currently planning overhaul
- Available at <https://stats.metc.state.mn.us/profile/>



# Community Profiles

Choose area from dropdown or click on the map

Select Area  Select an area from the dropdown list or click on map

View text list of profiles

Twin Cities Region (7-county)

<https://stats.metc.state.mn.us/profile/>



# Community Profiles

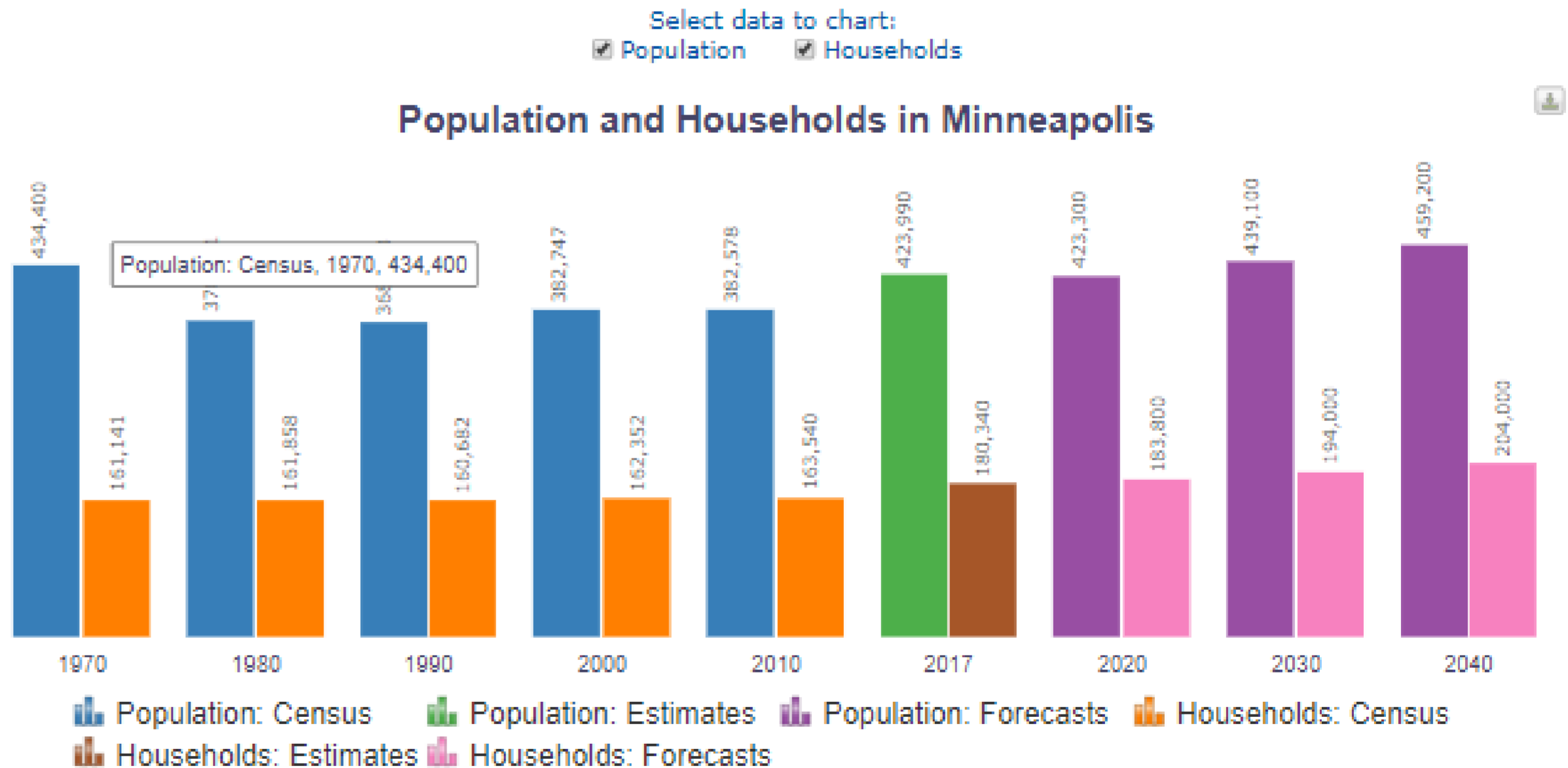
Choose tab for topic of interest

Select another area:  
Minneapolis

<https://stats.metc.state.mn.us/profile/detail.aspx?c=02395345>  
COPY PROFILE URL TO CLIPBOARD

OVERVIEW PEOPLE ECONOMY AND JOBS INCOME AND POVERTY HOUSING COMMUTING LAND USE AND DEVELOPMENT CHART EXPORTS

Population/Households (Historic, Current, and Forecasts)  
Population by Age and Gender  
Highest Level of Education  
Household Type  
Average Household Size  
Population by Race and Ethnicity



Click a population column for the mix of population in households and population in group quarters (not available for forecast years).

# Download Data

CENSUS, FORECASTS & ESTIMATES

REPORTS & VISUAL RESOURCES

COMMUNITY PROFILES

DOWNLOAD DATA

## DOWNLOAD DATA

### Download Tabular Data

Access US Census data or data provided by the Metropolitan Council for the Twin Cities region overall, or counties or communities within the seven-county metro.

#### Select a datasource to download

- Affordable housing construction
- Building permits, residential
- Demographic, economic, and commuting characteristics from the U.S. Census Bureau
- Employment forecasts
- Housing choice vouchers
- Industry type
- Land use, regional planned (Updated quarterly)
- Population and household estimates
- Price of existing home sales
- Travel time to selected destinations, estimated peak-hour
- Building permits, commercial, industrial and public
- Commuting data
- Employment
- Housing affordability estimates
- Housing stock
- Land use inventory
- Manufactured home parks
- Population and household forecasts
- Publicly subsidized housing
- Wages

#### Select a geographic level for the data:

- Community (City and Township)
- Totals for the seven-county region
- County
- All Station Areas

NEXT

[https://stats.metc.state.mn.us/data\\_download/dd\\_start.aspx/](https://stats.metc.state.mn.us/data_download/dd_start.aspx/)

# Interactive dashboards

## VISUALIZING REGIONAL RACIAL DISPARITIES

### Exploring economic disparities by race and ethnicity in U.S. metros

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Despite gains for some groups on some measures, there have been no notable changes in this overall pattern. This underscores the persistence of racial and ethnic disparities in the Twin Cities metro, and their potential to further undermine the region's prosperity and economic competitiveness.

This interactive tool is an invitation to the region's stakeholders to explore this metro-area data in new ways to inform strategies and solutions toward advancing equity and eliminating racial and ethnic disparities.

< 1 2 3 >

Use icons to select topic



Compare the Twin Cities metro to either group

25 most populous metros

Greater MSP peer regions

How do metro rankings change over time?

2017



<https://metro council.org/visualizedisparities>

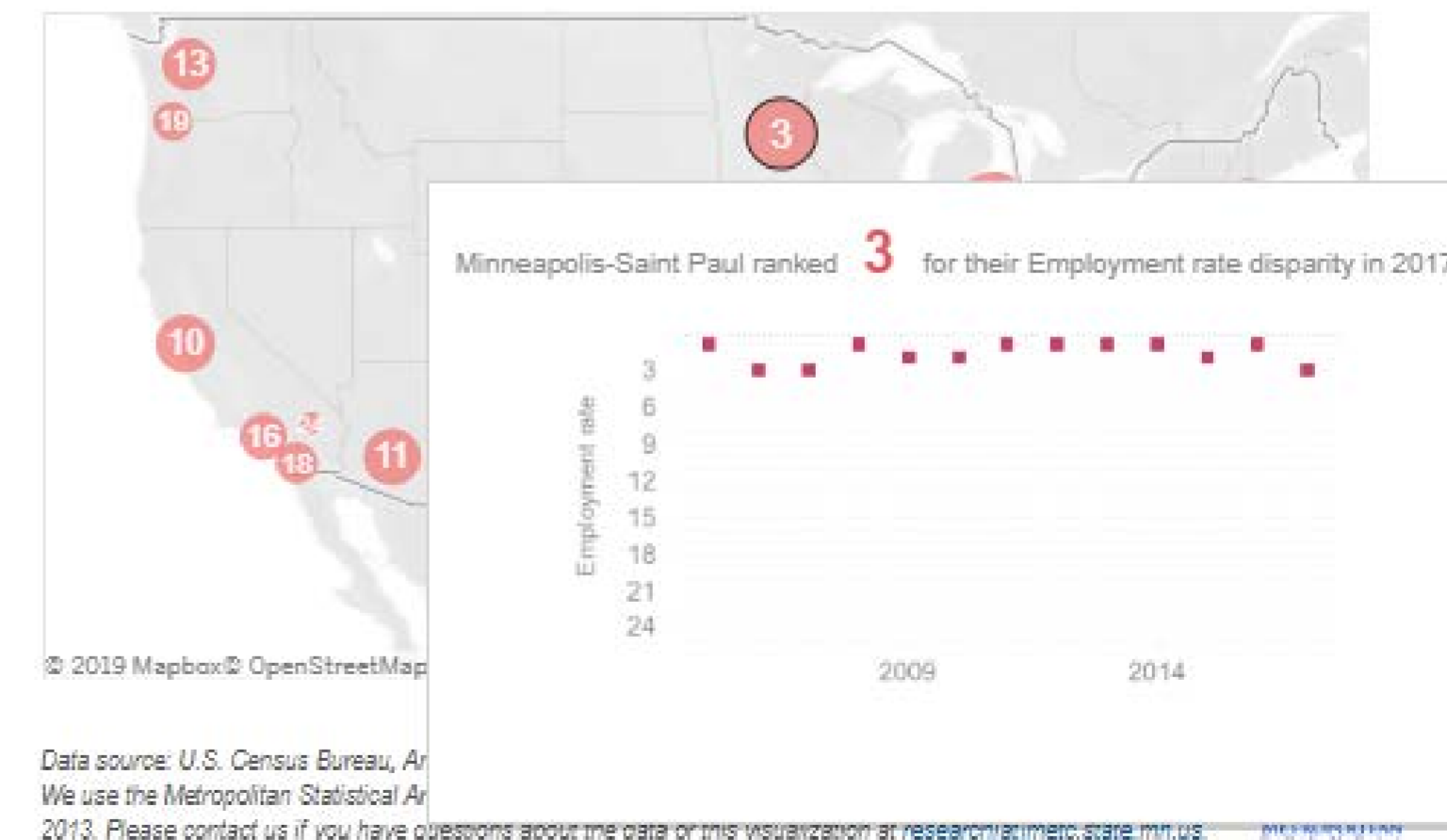
### REGIONAL PROSPERITY

The map below ranks metros based on the topic area selected (1=best)



### REGIONAL DISPARITIES

The map below ranks metros' disparities between white residents and residents of color based on the topic select (1=largest/worst)



# Interactive dashboards

## VISUALIZING REGIONAL RACIAL DISPARITIES

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Select one or more metros (in green) from the map (Use CTRL + click for multiple selections)



Select at least one group (below) to chart trends by metro

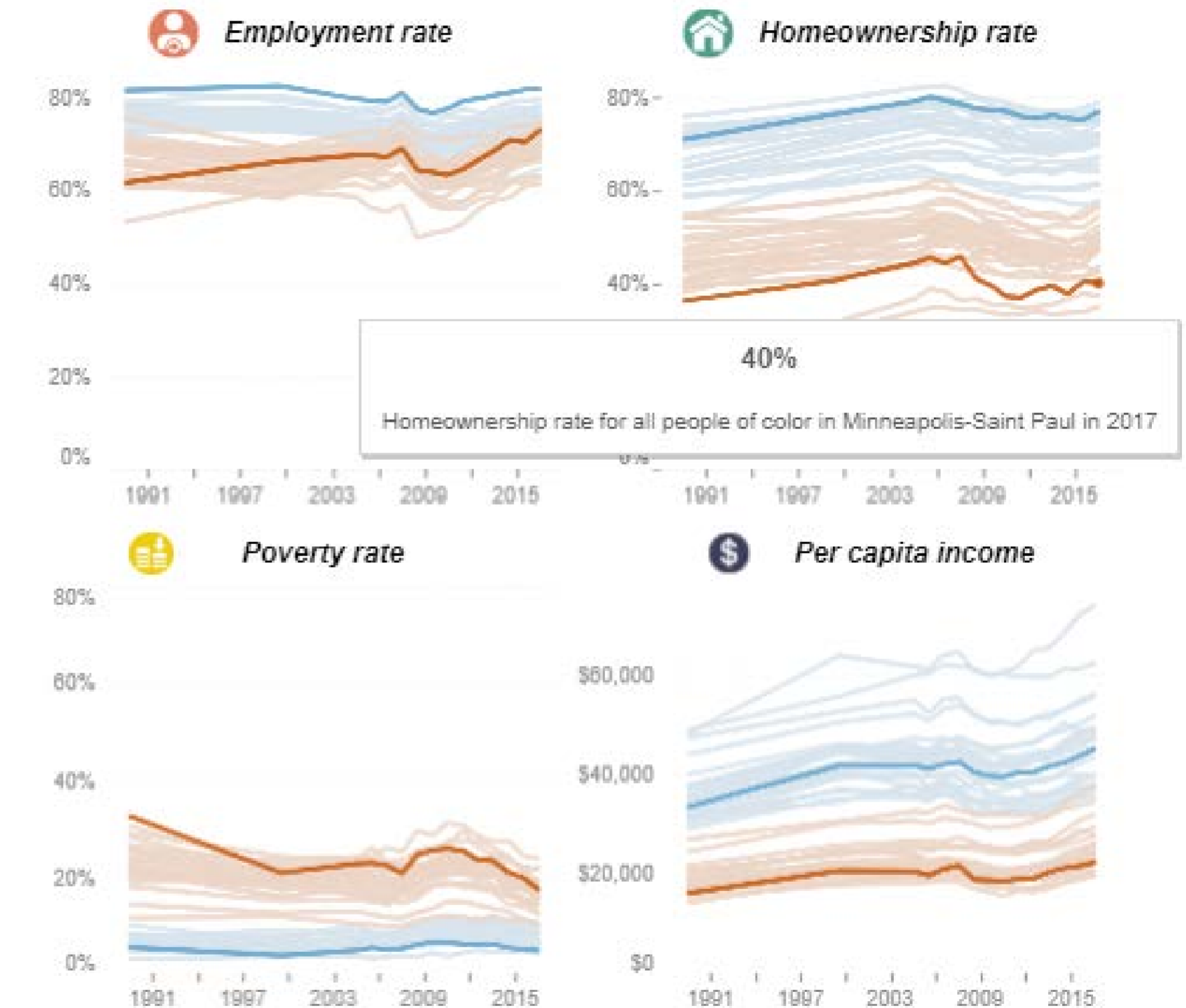
(Multiple values)

- All people of color
- American Indian
- Asian/Pacific Islander
- Black
- Latinx
- White, non-Latinx

### TRENDS BY RACE & ETHNICITY

Despite gains for some groups on some measures, most metros show disparities between white residents and residents of color in these four economic measures.

Notice that gaps differ by metro, by group, and by measure.



Data source: U.S. Census Bureau, American Community Survey One-Year Estimates; 1990, 2000, and 2005-2017. We use the Metropolitan Statistical Areas ("metros") as defined by the U.S. Office of Management and Budget in 2013. Please contact us if you have questions about the data or this visualization at [research@metro.state.mn.us](mailto:research@metro.state.mn.us)



<https://metro council.org/visualizedisparities>

# Interactive dashboards

## VISUALIZING REGIONAL RACIAL DISPARITIES

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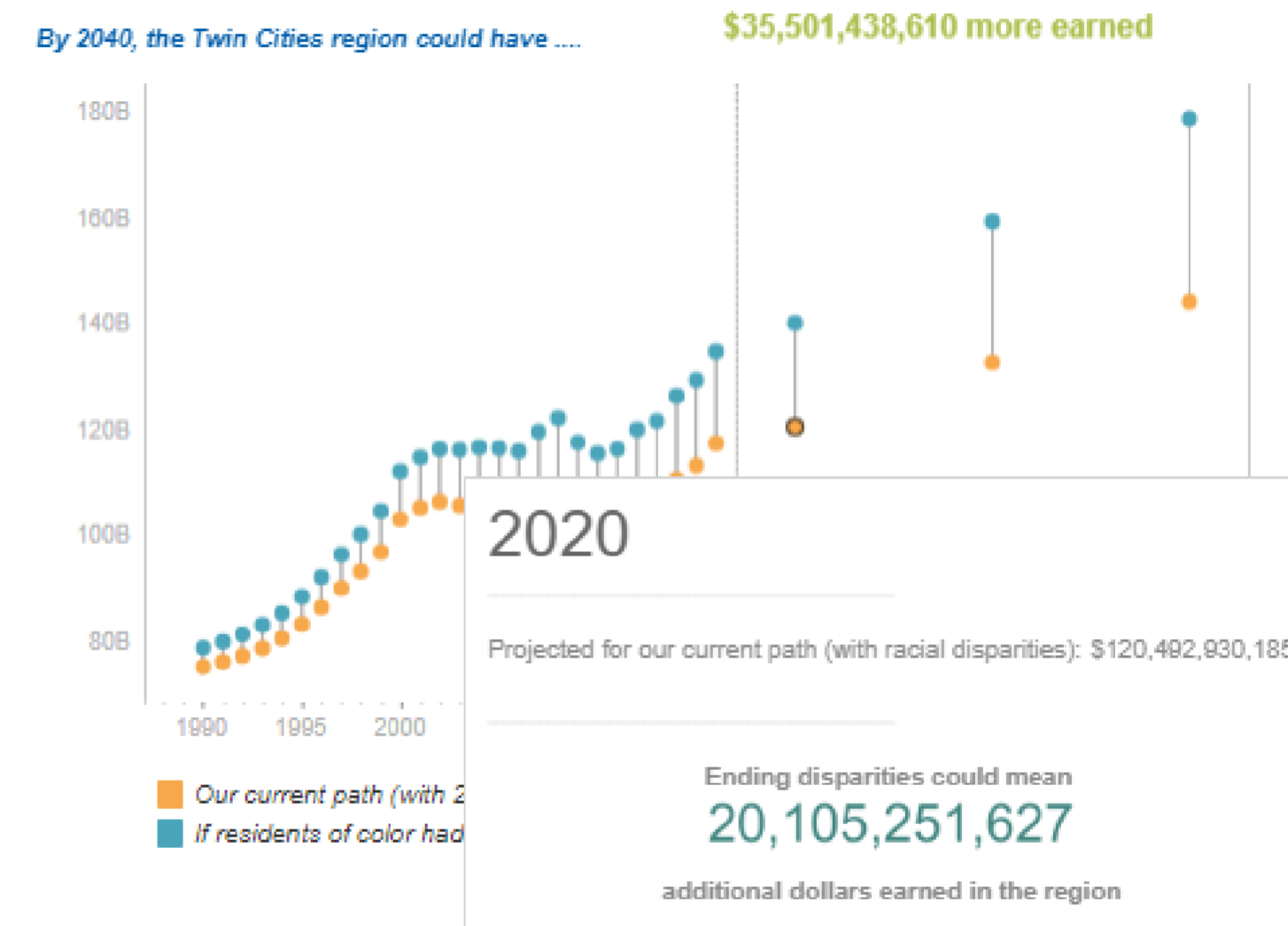


<https://metro council.org/visualizedisparities>

### OUR FUTURE, OUR CHOICES

The seven-county Twin Cities region will become more racially and ethnically diverse by 2040. This will either compound the challenges should existing racial disparities continue or create considerable opportunities, should they be eliminated.

The Twin Cities region does not have to miss these opportunities:

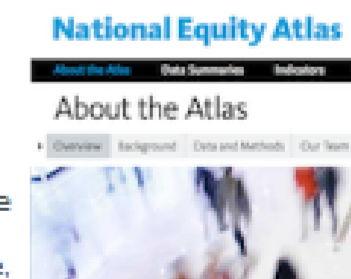


The Council, our partners, and many other regional and national stakeholders are dedicated to finding solutions that effectively address racial disparities. Explore the links below to learn more.

The **Center for Economic Inclusion** is the nation's first organization dedicated exclusively to advancing inclusive growth to achieve regional prosperity, located right here in the Twin Cities region.



The **National Equity Atlas** is a first-of-its-kind data and policy tool for the community leaders and policymakers who are working to build a new economy that is equitable, resilient, and prosperous.



The **Make It. MSP.** Professionals of Color Team at **Greater MSP** is exploring how to develop and scale cross-sector regional solutions to improve the retention rates of professionals of color in the Minneapolis-



As the regional policy-making body, planning agency, and provider of essential services for the region, the **Metropolitan Council** has a role in advancing equity.



# Interactive dashboards

## THRIVE INDICATOR DASHBOARD

Assessing the region's progress on Thrive's outcomes and strategies

Thrive MSP 2040 Indicators—summarized in this interactive dashboard—serve as a foundation for continuous improvement, public accountability, and dialogue between the Council and our partners and stakeholders. We will update these indicators annually and use the insights that emerge to guide future decisions, including adjusting policies and priorities as needed to more effectively advance our shared regional vision.

Explore indicators by *Thrive MSP 2040* outcome



The Thrive logo (above) will bring you back to this page.

With *Thrive MSP 2040*, the Council adopted an outcome-orientation to regional policy, focusing on policies that demonstrably improve our region. This shared, strategic vision is expressed through five outcomes—Stewardship, Prosperity, Equity, Livability, and Sustainability. Together, they reinforce and support one another to produce greater benefits than any single outcome alone.

Thrive indicators allow us to ask and discuss key questions, such as

- + What do the indicators tell us about the state of the region and the Council's policies?
- + Which policies are working well?
- + How might we revise our policies where performance is falling short of expectations?

Learn more about *Thrive MSP 2040*, available at <https://metro council.org>.

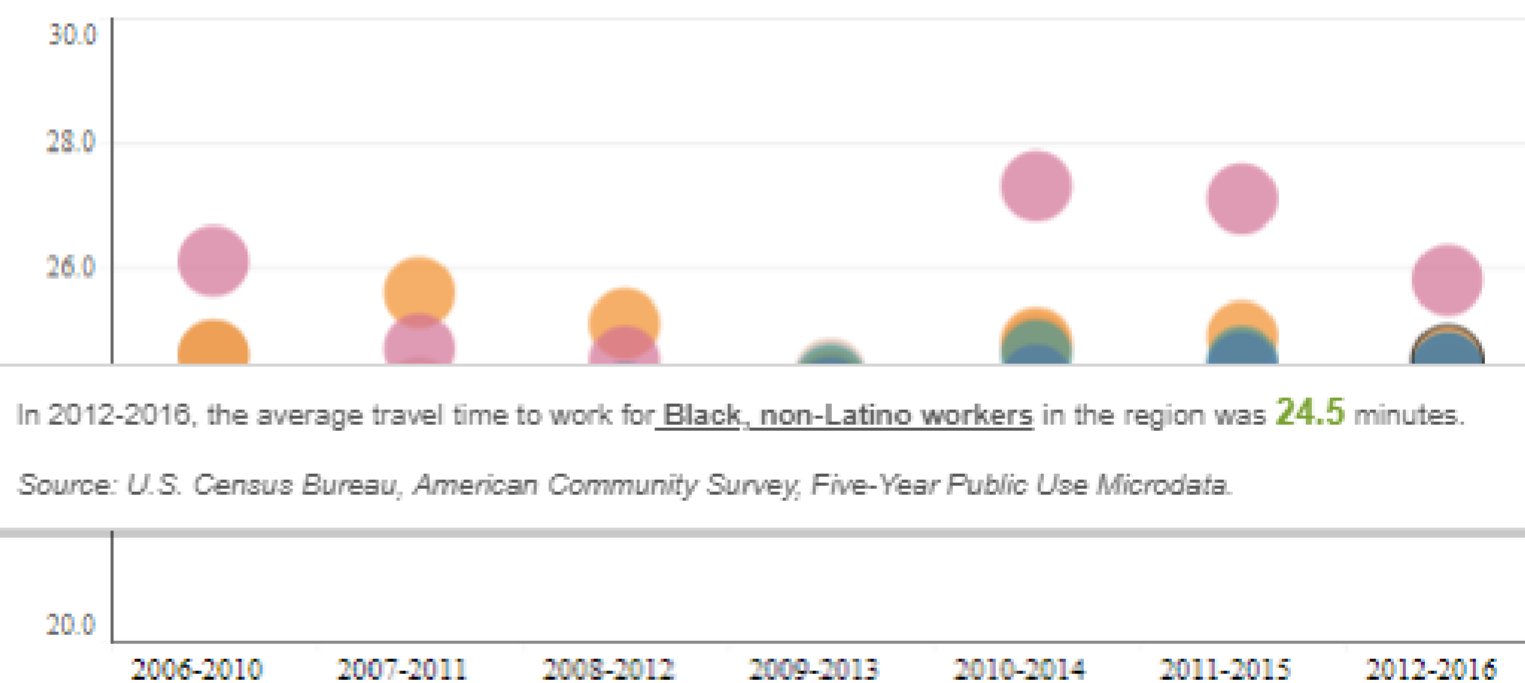
## LIVABILITY

Select a **Livability** indicator

- Affordable housing as a share of new residential construction
- Average number of jobs reachable by 30-minutes transit
- Average travel time to work
- Share of commuters that drive who travel less than 20 minutes to work
- Share of commutes via walk, bike, rideshare, or transit
- Share of households experiencing housing cost burden
- Share of the region with housing options
- Share of transit stations with housing options
- Vehicle Miles Traveled per capita (daily)
- Visits to regional parks and trails per capita



Average travel time to work



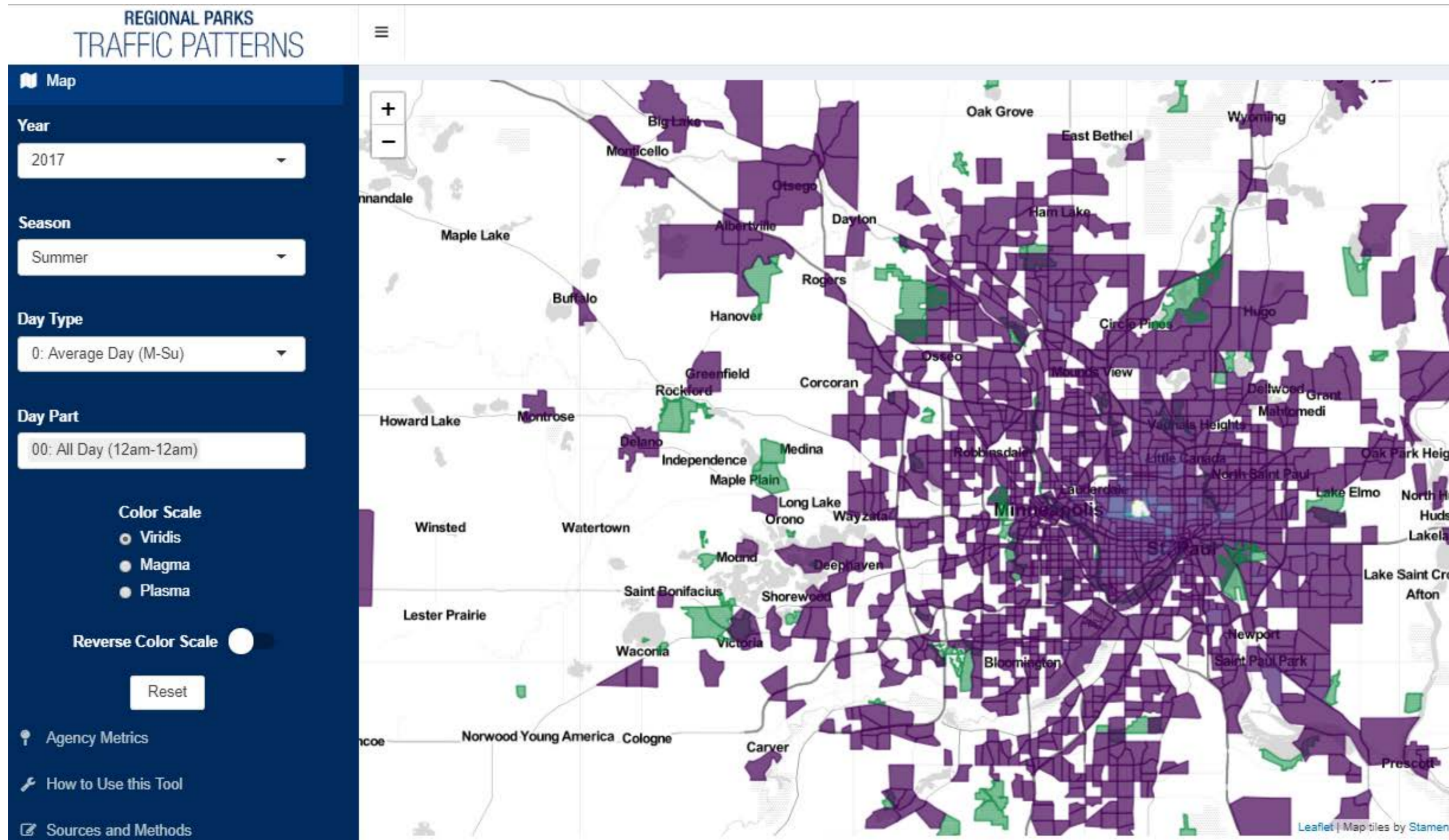
In 2012-2016, the average travel time to work for **Black, non-Latino workers** in the region was **24.5** minutes.

Source: U.S. Census Bureau, American Community Survey, Five-Year Public Use Microdata.

- all
- Black, non-Latino
- White, non-Latino
- American Indian, non-Latino
- Latino

# Custom planning apps

## Visualizing travel to regional parks





# Reports



## What a difference a rate makes: population growth, housing production, and vacancy in the Twin Cities region since 2010

### Introduction and key findings

Each year, the Council's research team estimates the population and households of each city and township in the Twin Cities region. We track housing units in detail, then use data from the U.S. Census Bureau's American Community Survey, the U.S. Postal Service, and our own surveys to estimate people living in housing units, and people living in group quarters (such as people living in nursing homes and college dorms). With this information, we arrive at an annual estimate of total population for cities and townships in the region.<sup>1</sup>

Our focus	How has the region's population changed since 2010?	Has population growth impacted the region's housing market?	Why does an overall low vacancy rate matter?
Our findings	The region's population is nearing 3.1 million. The region has added almost 226,000 residents since 2010, an increase of 7.9%. There was notable population growth in Urban Center and Suburban Edge communities. In context, however, these gains are less impressive: the region's growth is slightly below our peer metros' average.	The region's housing production has not kept pace with population growth, resulting in a housing production shortfall behind only San Francisco and Atlanta. Recent data show the region's housing production is now on the upswing, but lowering the vacancy rate to "healthy" levels will require a substantial increase in production.	"Healthy" vacancy rates—often cited as 5%—mean housing costs largely follow inflation. Low vacancy rates can result in rapidly rising costs. With a rental vacancy rate under 5% since late 2014, rents have grown three times faster than if they followed inflation since 2010. This amounts to about \$155 more per month, on average.

### We have more people (and they need housing)

We estimate the Twin Cities region's total population was 3,075,563 on April 1, 2017, which is about 226,000 more residents than the region had in 2010 (Figure 1). Two-thirds of this population increase has come from "natural growth" (births outpacing deaths), and the remaining third is the result of net migration (more people moved into the region than moved out of it, primarily from outside the U.S.). This population growth translates to 83,100 households added region-wide since 2010. Over the same period, the region added about 63,604 housing units. Taken together, it's clear that the region's overall household growth considerably outpaced its housing production (7.4% versus 5.4%, respectively). As a result, about 20,000 new households occupied units within the existing housing supply, drawing down the region's vacancy rate to record lows.

So what does this growth mean for the Twin Cities region? We explore the implications in the following pages.

FIGURE 1. 2017 POPULATION ESTIMATES

	Census April 1, 2010	Estimated April 1, 2017	Change 2010-2017	Percent change 2010-2017
Population	2,849,567	3,075,563	225,996	7.9%
Households	1,117,749	1,200,840	83,091	7.4%
Housing units	1,186,986	1,250,590	63,604	5.4%

Source: Metropolitan Council's 2017 Population Estimates. The first estimates are available at [metrocount.org/updates/population](http://metrocount.org/updates/population) and in our Community Profiles at [metrocount.org](http://metrocount.org).

## At a Loss: Affordable Housing Production in 2017

Each year the research team at Metropolitan Council asks cities and townships across the Twin Cities region about their residential construction projects and whether these new housing units are affordable to low-income households. We use the term 'affordable' to describe housing units that low-income households can pay for with up to (but not more than) 30% of their monthly income. Metropolitan Council considers low-income households to be those with incomes at or below 60% Area Median Income (AMI), relative to household size. (Area Median Income is a measure calculated annually by the U.S. Department of Housing and Urban Development.)<sup>1</sup> For example, a family of four with an income of \$51,480 (60% AMI) would be considered a low-income household. A unit affordable to that household would include a three-bedroom apartment with a monthly rent of \$1,410 or less.

By tracking the price point of residential housing production we can better understand the landscape of housing options for the region's current and future households and assess strategies against stated policy goals.

Key Findings
<ul style="list-style-type: none"> <li>Region-wide housing cost burden fell for the sixth consecutive year in 2017. However, the region's low-income households, who currently reside in every city and township across the region, remained disproportionately cost-burdened in 2017.</li> <li>One in every eight new units added to the region's housing stock was affordable in 2017, a total of 1,731 units. Nearly 9,000 new affordable units have been added to the region's housing stock since 2011, far below the 32,570 new affordable units needed between 2011 and 2020 to keep pace with household growth.</li> <li>The predominant housing type of new affordable housing continues to be multifamily rental units at 96% in 2017. Affordable single family homes and affordable townhome production hit a new low in 2017.</li> <li>Losses of affordable units are more difficult to track and measure than production. However, known or estimated losses in even narrow segments of the affordable housing market show that the region has likely lost more affordable units than it has produced since 2011.</li> </ul>



**Five Lake Marsh, Prior Lake**  
A 68-unit workforce housing development with one-, two-, and three-bedroom units affordable to households with incomes at 30% AMI and 50% AMI. The project was funded by the Scott County Community Development Agency and Minnesota Housing allocated a million dollars in Low Income Housing Tax Credits.



**Downtown View, Minneapolis**  
In partnership with Project for Public Living (PPL), YouthLink has created a 48-unit development for young adults (ages 18-24) who are experiencing homelessness and have incomes below 30% AMI. Minnesota Affordable Housing Trust Fund, Metropolitan Council, Hennepin County, were among the funders.

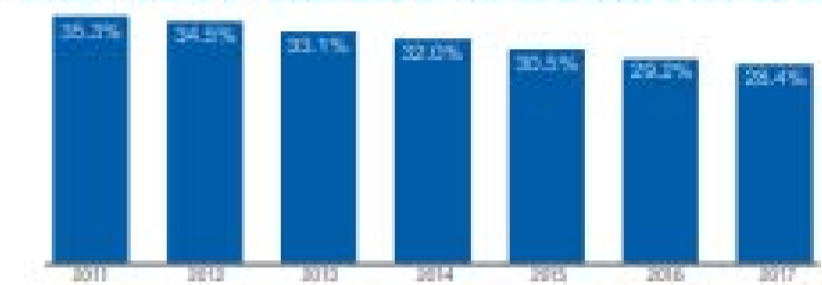


**Greenway Terrace, Ramsey**  
Acor's 54-unit project in the city's 300-year-old mixed-use downtown development (The OOR). Two blocks from the Northern corridor, this project has units affordable to households with incomes at 30% AMI and 50% AMI. Funders included the city, Metropolitan Council, Anoka County, and Minnesota Housing.

## Housing cost-burden rates reveal a sustained demand for new affordable housing everywhere

Housing cost burden—households that pay more than 30% of their income on housing costs—fell for the sixth consecutive year in 2017 (Figure 1). This an encouraging trend. When people can't find housing they can afford, the effects are far-reaching and they're often forced to make trade-offs between paying their rent or mortgage and other daily essentials like food, medical care, and transportation. Although the cost-burden rate among the region's households is down overall, nearly 327,000 households (28.4%) experienced housing cost burden in 2017. Cost-burden rates have fallen across the region, but not everywhere: 19 cities and townships showed an increase or no change in their share of cost-burdened households between 2011 and 2017.<sup>2</sup>

FIGURE 1. SHARE OF HOUSEHOLDS EXPERIENCING HOUSING COST BURDEN

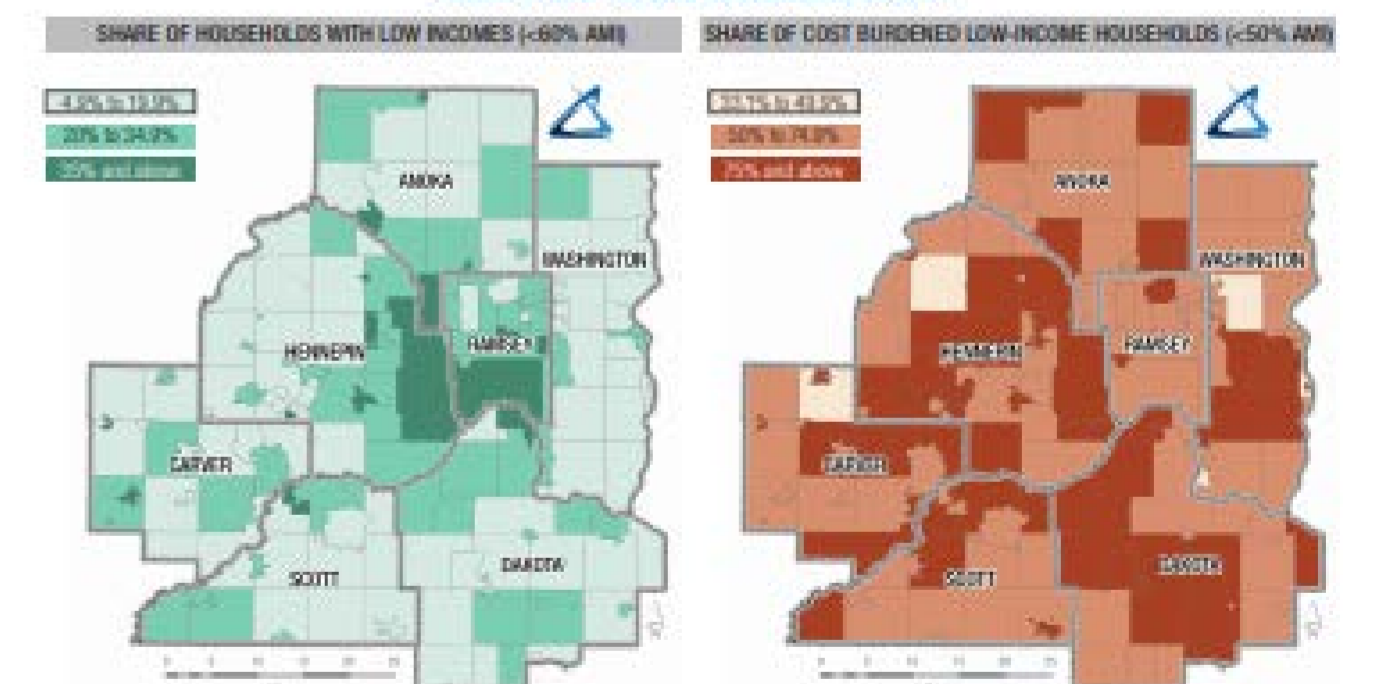


Source: U.S. Census Bureau, American Community Survey Five Year Estimates.

High-level trends (like Figure 1) tend to cloud realities on the ground, however. The region's low-income households are disproportionately housing cost burdened. For example, the rate of cost burden among households with incomes below 50% of Area Median Income (AMI) was 77.9% in 2017—nearly triple the overall rate of 28.4%. In fact, the lowest observed rate of cost burden among low-income households in any of the region's cities or townships was 33% (Figure 2, right).

These aren't new or particularly surprising findings but we've presented them here to underscore a broader point: low-income households live in every city and township in the region (Figure 2, left) and the vast majority experience housing cost burden (Figure 2, right). All cities and townships have cause to engage in the affordable housing discussion and have a role to play in expanding housing choice for the region's residents.

FIGURE 2. LOW-INCOME HOUSEHOLDS IN 2017



Source: Metropolitan Council's Housing Affordability Estimates, 2017.

Source: Metropolitan Council's Housing Affordability Estimates, 2017; U.S. Census Bureau, American Community Survey One Year Estimates, 2017.

## Some upcoming and current projects

- Reframing areas of concentrated poverty (June)
- 2018 Population estimates (July)
- Greenhouse gas inventory and scenario planning tools (iterative releases)
- Parks visitation using cell phone GPS data (May-June)
- Community profiles 2.0 (December)
- Redrawing of census tracts and block groups (May)
- Update to visualizing regional racial disparities dashboard
- Update to Thrive indicators dashboard (October)
- Economic competitiveness dashboard (November)
- 2020 parks visitor study planning (December)
- Suburban neighborhood change (August)
- Many more

# Metropolitan Council's Forecasts Program

5/1/2019

Presenting to Committee of the Whole



# Why we forecast

- Forecasts provide a reference as region and local governments prepare plans
- Plans “addressing areas and populations to be served, the levels, distribution, and staging of services” (*Minn. Stat. 473.146*)
  - Regional systems and services are scaled to meet forecasted demand
  - Local plans, infrastructure, services respond to the same forecasts
  - Broad set of audiences and users

# Forecast models toolkit

**Regional economic model system** for region-level employment and population

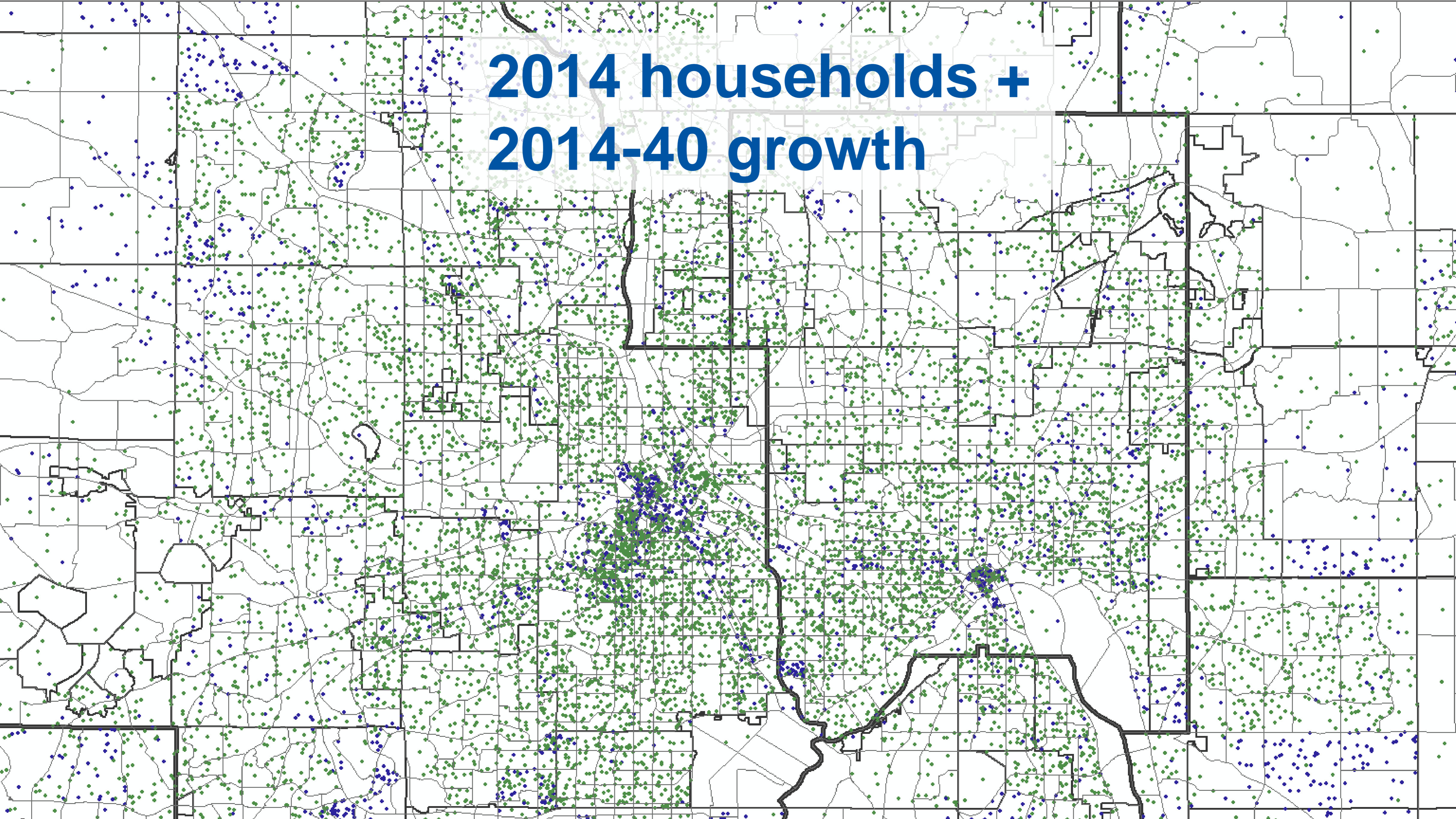
**Land use model system** for location of future land use, local households and employment

**Travel demand model system** for future network conditions and accessibility measures, accounting for connection of places

# Met Council's local land use model

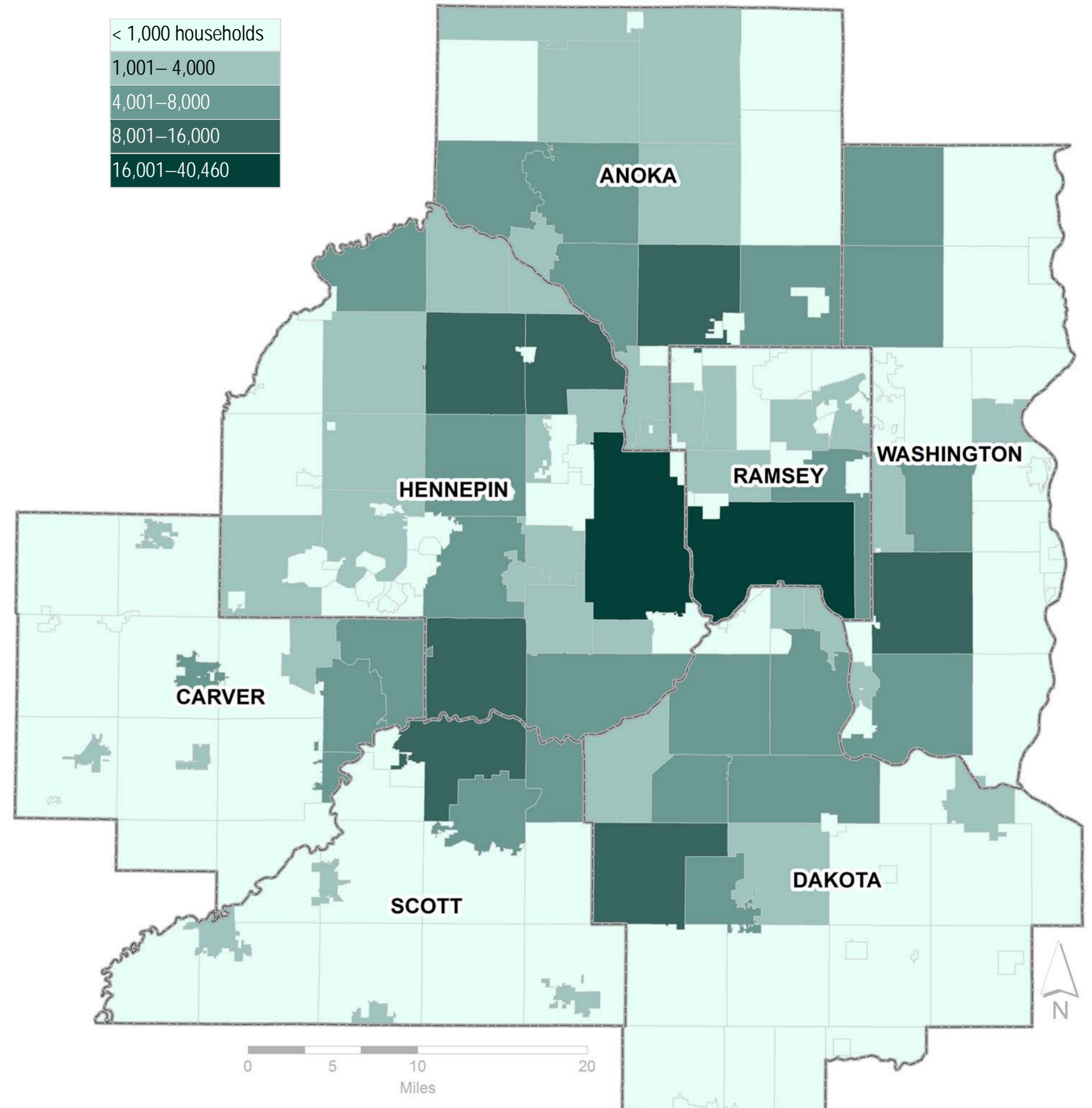
- *Where will we add 495,000 jobs and 419,000 households?*
- **Modeling the dynamics of location choice**
  - **Neighborhood choices:** *What locations best suit preferences of households and employers?*
  - **Supply of real estate:** *What locations are viable to developers?  
Policies and planning controls set the envelope*
  - **It's an economic model:** *Location decisions mediated by real estate prices, market constraints*

# 2014 households + 2014-40 growth



# Forecast results: Households growth

- The region will gain 419,000 households over 30 years
- Expect growth in all parts of the metro urban services area

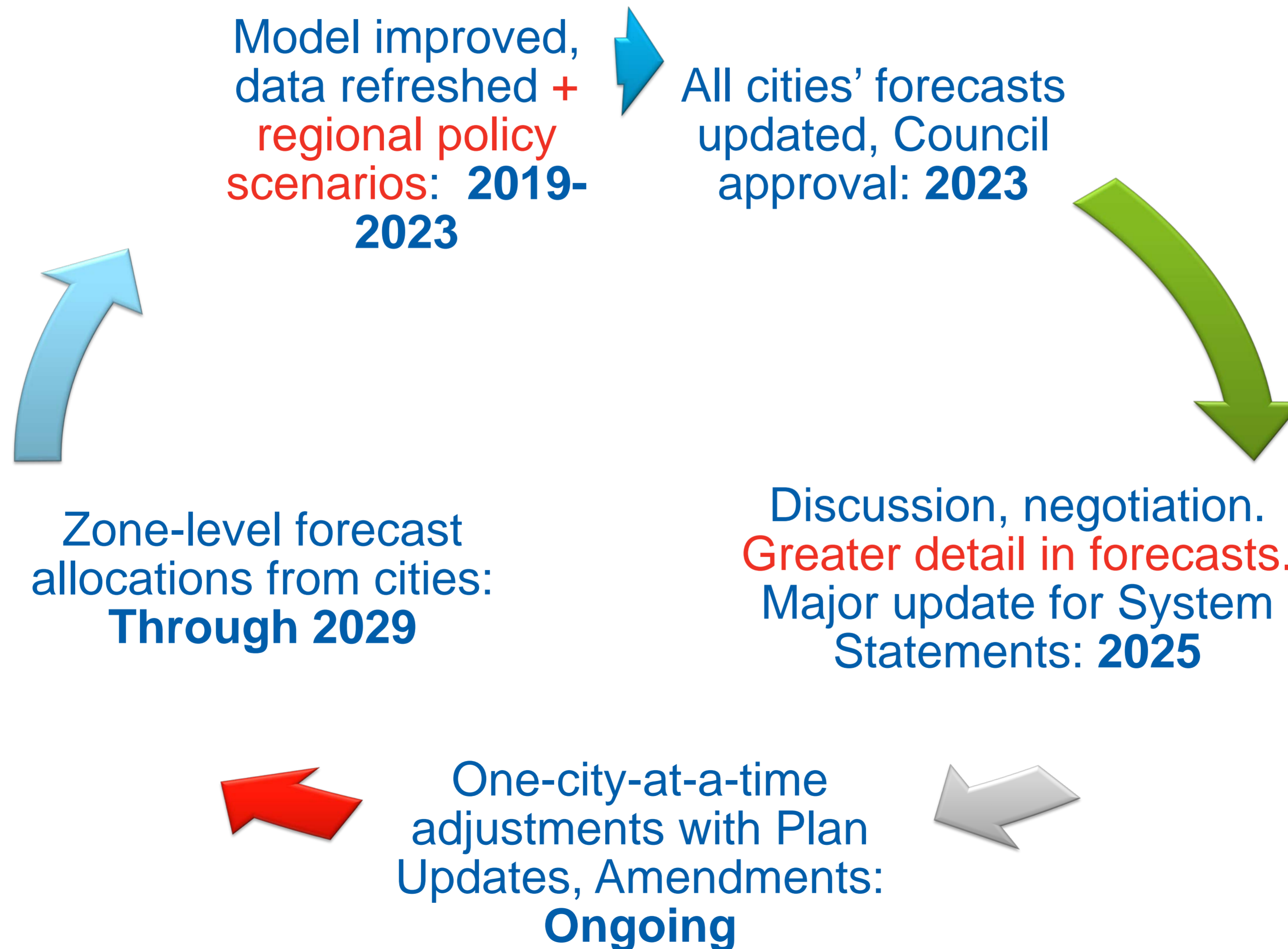




# Managing the forecasts

- Local forecasts are approved by Council action – at start of the planning cycle, and ongoing
- Zone forecasts are more locally granular
  - Zone forecasts initially from land use model
  - Adjusted to fit with community totals
  - Ultimately replaced by local government-provided TAZ allocations, consistent with land planning and staging
- Forecasts can be changed
  - We have processes to manage the community forecasts and zone forecasts, and to enforce consistency

# Managing the forecasts: Into the next cycle



# Forecasts in reviewing local plans

- Forecasts consistently presented throughout
- Allocation of forecasts to TAZs
  - Accurate math, reasonable, consistent with planned land use
- Sewer-serviced subtotal (and unserviced) fits with expectations and MUSA
- Local capacity greater-than-or-equal-to the forecast
  - Numbers of acres X middle of density range
  - Considering both new land and redevelopment areas

# Engaging with local governments

- Met Council requires local land use plans be consistent with the Council's forecasts
  - Cities can achieve consistency by adjusting land uses, or future development staging, or intensity
  - Met Council is receptive to adjusting local forecasts *if needed*
- Our goals for the forecast program:
  - The forecasts represent well-reasoned expectations about the future
  - Met Council and local planners working from the same numbers

# More information

- 2040 forecasts for cities and townships: [metro council.org/forecasts/](https://metro council.org/forecasts/)
- 2040 forecasts for transportation analysis zones (TAZs): [gisdata.mn.gov/dataset?q=taz+forecast](https://gisdata.mn.gov/dataset?q=taz+forecast)

# Research and Data Services Overview

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Presenting to Committee of the Whole

