

# Metropolitan Council's local forecasts to 2050

Todd Graham, Principal Forecaster



September 18, 2024

[metro council.org/forecasts/](https://metro council.org/forecasts/)

# Agenda

1. Why we forecast
2. Recap of progress to now
3. Highlights of the local forecasts
4. Participation of local governments and the public



# Why we forecast



## Long-range forecasts of population, jobs

Provide a shared foundation for coordinated planning, systems and services

- Regional systems and services are scaled to meet forecasted demand
- Local plans, infrastructure, services respond to the same forecasts
- Coordination with partner agencies

Maintained, updated to inform planning

Authorized by *MN Statutes* 473.146 and 473.859

# Recap of progress to now





# Updated regional forecast to 2050

	2010	2020	2023	2030	2040	2050
Employment	1,541,000	1,581,000	1,763,000	1,802,000	1,895,000	2,074,000
Households	1,118,000	1,240,000	1,288,000	1,350,000	1,450,000	1,564,000
Average HH size	2.50	2.50	2.46	2.44	2.40	2.39
Population	2,850,000	3,163,000	3,222,000	3,364,000	3,555,000	3,820,000
Population Growth	207,000	313,000	—	201,000	191,000	265,000

Source: 2010 – 2023: US Bureau of Labor Statistics (BLS), US Census Bureau, Metropolitan Council;  
2024 – 2050: Metropolitan Council's regional forecast (2023)

# From macro-level to local: Our local land use model



## Regional totals from the macro model are allocated to specific places

### UrbanSim model

- Analyzes, represents, and projects where growth will happen
- This future projection involves extrapolation of behaviors, trends, patterns
- Accounts for the competition between places

*Specifically,* UrbanSim simulates real estate dynamics, with submodels that handle the projection of

- Real estate supply (new development) for 12 real estate types
- Location choice behavior for household types and industry types

# From macro-level to local: Numbers for every city and zone



## Local forecasts at [metro council.org/forecasts](https://metro council.org/forecasts)

- City- and township-level results
  - Excel workbook format
  - Also interactive webmap at [metro council.org/forecasts](https://metro council.org/forecasts)
- Transportation Analysis Zone tabulations
  - Will be published to MN GEO in September
- **Preliminary** Local Forecasts (version 1) published Jan. 2024
  - Informal local government comments during Jan.– Feb.
- **Proposed** Local Forecasts (version 2) online now
  - Formal process, meaning Council takes action at end
  - Public hearing open Aug. 15 – Oct. 7

# Proposed Local Forecasts, ver. 2

## Updated info and improvements

- Update certain predictor data: local planned land use capacities
  - The effect in the modelscape: more permissive allowances for redevelopment, intensity on mixeduse land in fully developed locations
- Update system characteristics: Fiscally Constrained Scenario transportation modeling; cumulative accessibility is calculated from travel demand model runs in May-June 2024
  - The effect in the modelscape: boost propensity for new housing closer to employment, OR new/expanded worksite closer to housing, OR both
- Reflect known developments, in right places, thru Dec. 2023
  - The effect in the modelscape: refocusing development toward currently “hot” locations



# Proposed Local Forecasts, ver. 2

## Updated info and improvements (continued)

- More explicit future (to 2050) housing mix
- Projection improvement of population per household
- Post-model development limits for:
  - Agricultural communities
  - Places in White Bear Lake-shed, subject to Court-ordered groundwater use limits

## Not changed

- Regional population and employment totals are unchanged from the regional forecast presented to the Council in 2023
  - A forecast boost to any given place means forecast offsets in other places

# Highlights of the local forecasts

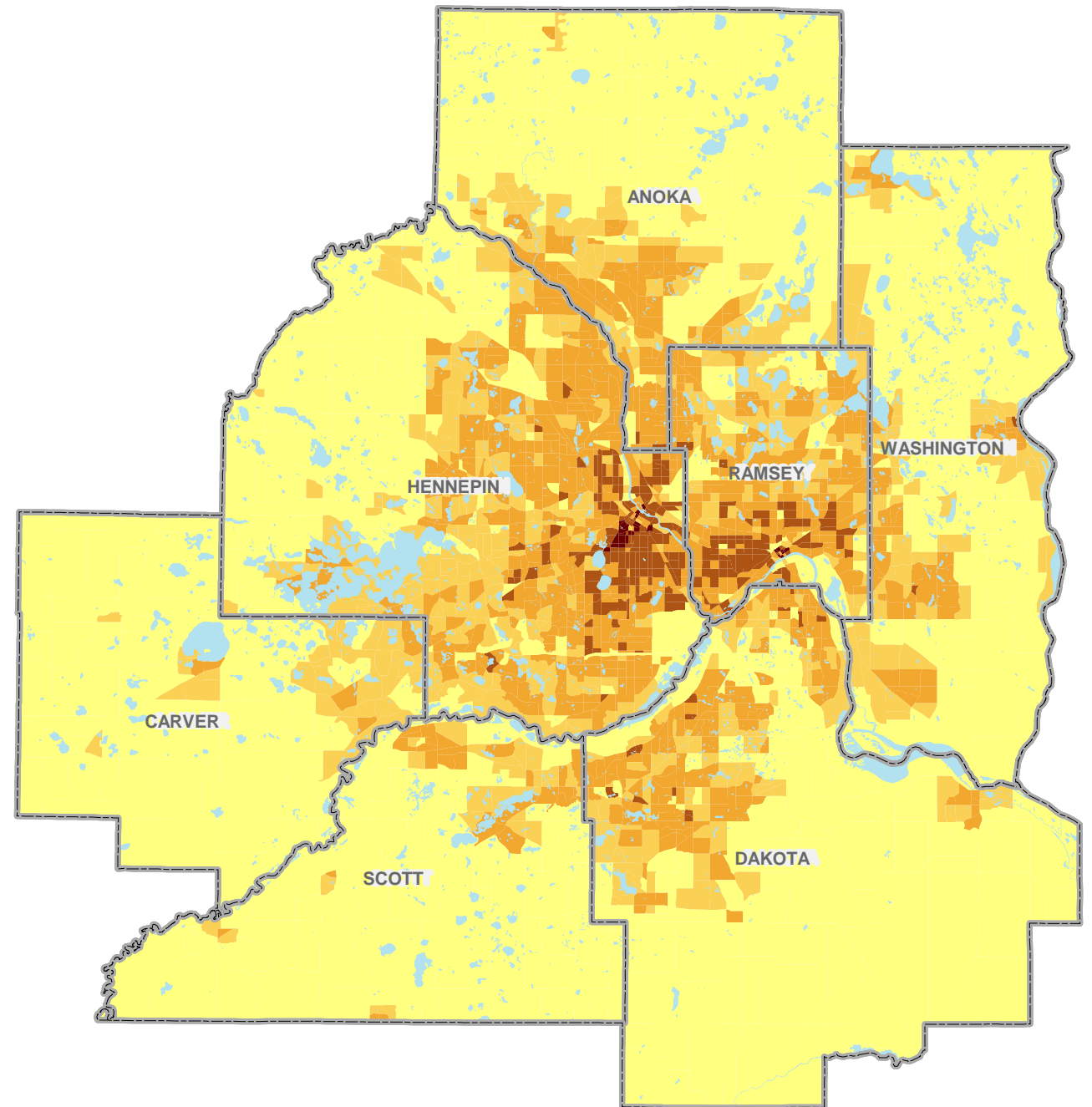
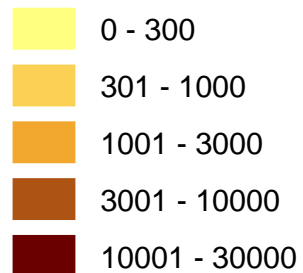




# Households in 2020

- 1,239,500 households in 2020
- 3,163,100 population
- A full range of community types
- More suburban in composition than most peer major metros

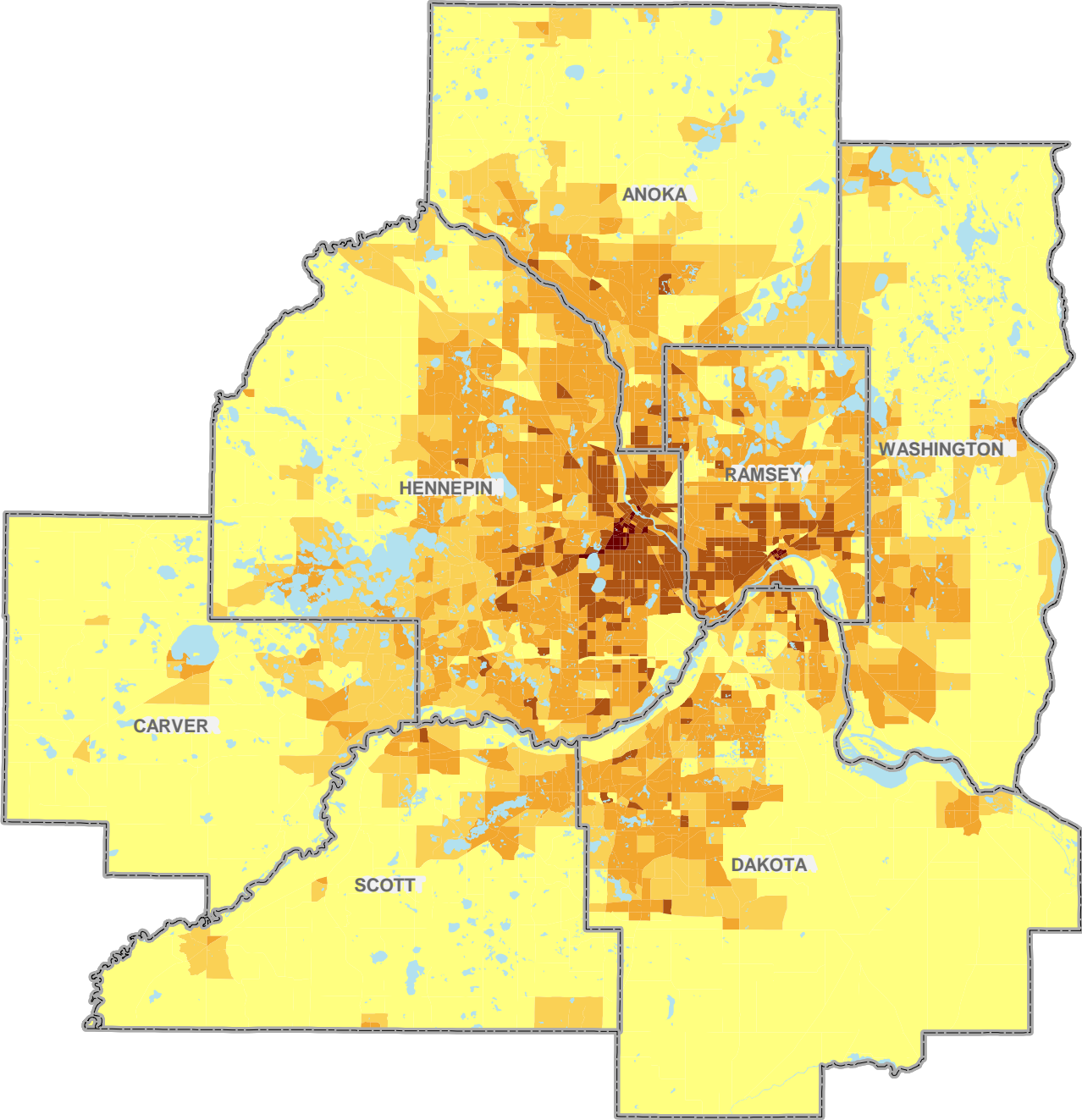
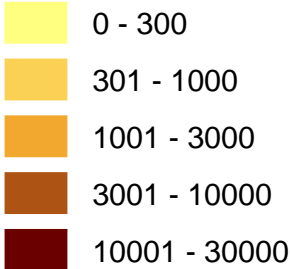
**total\_households / Square\_Miles**



# Households in 2050

- Metro region to add +324,000 households by 2050
- Outward growth around the suburban edges
- Existing suburbs are filling in
- Substantial intensification and redevelopment in urban centers

total\_households / Square\_Miles

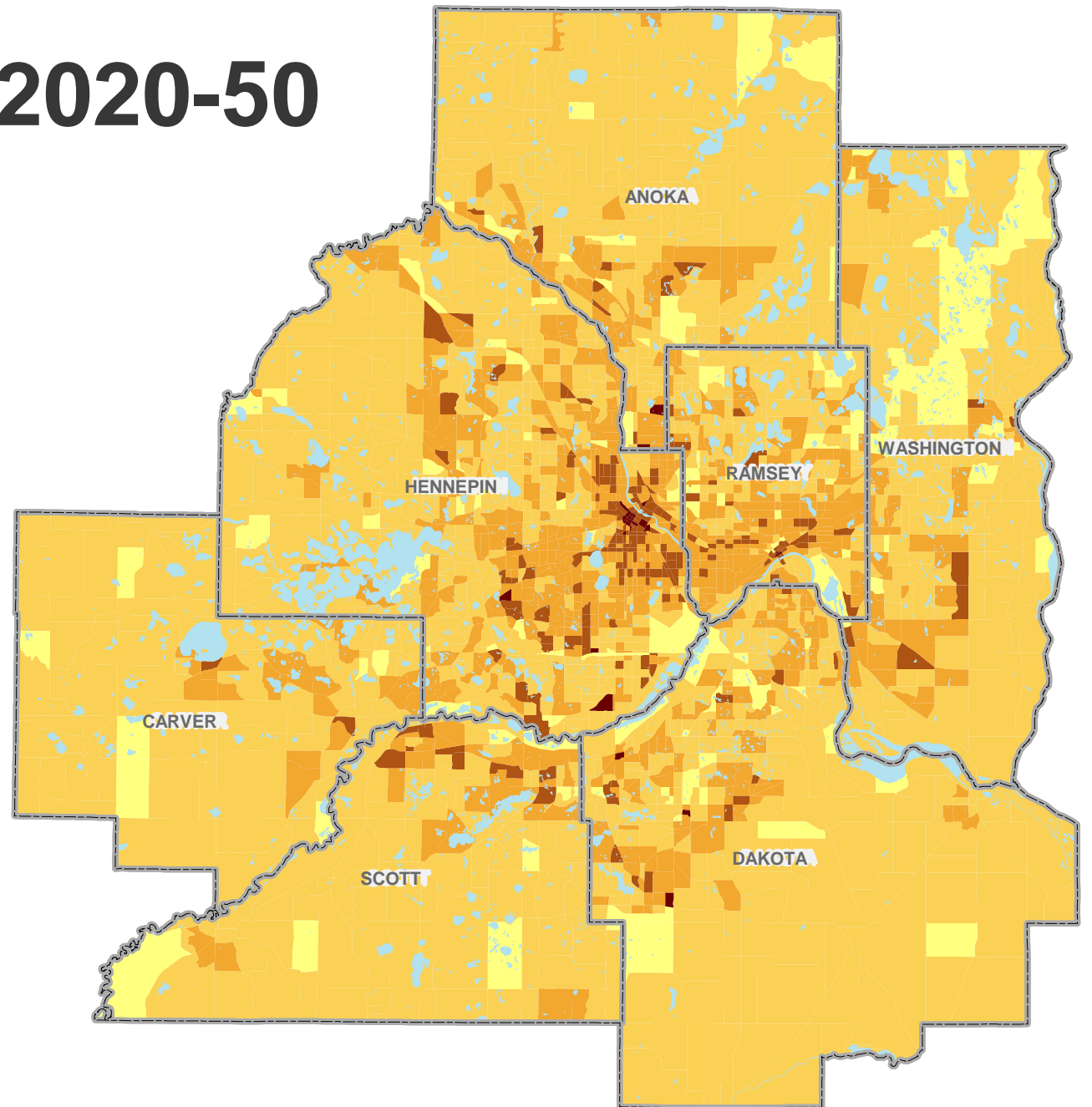
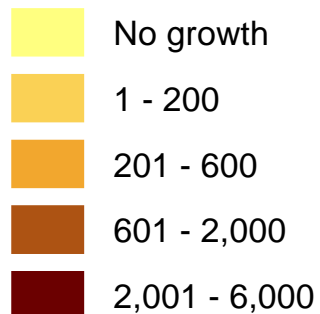




# Households growth, 2020-50

- Metro region to add +324,000 households by 2050
- Outward growth around the suburban edges
- Existing suburbs are filling in
- Substantial intensification and redevelopment in urban centers

total\_households / sq\_miles



# Local forecast summary: households



## Growth happens in local, specific places

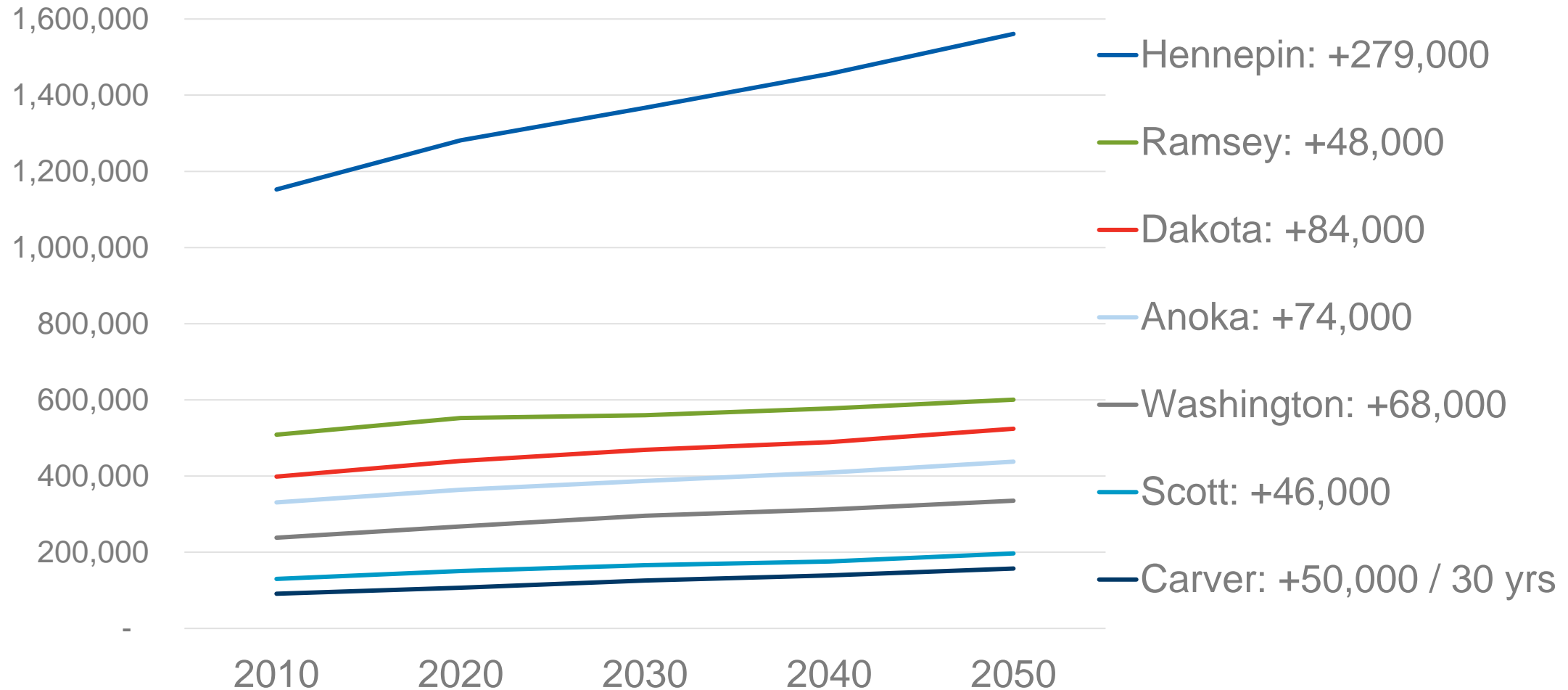
Adding 324,000 households over 30 years – where?

Our model is designed to produce a probable, middle-of-the-road answer

- 33% of the net growth in urban centers and urban communities
- 41% in suburban and suburban edge
- 20% in emerging suburban edge
- 6% in rural communities
- This pattern is +4 points more urban and -4 points less rural than currently used forecast (*Thrive MSP 2040* forecast)



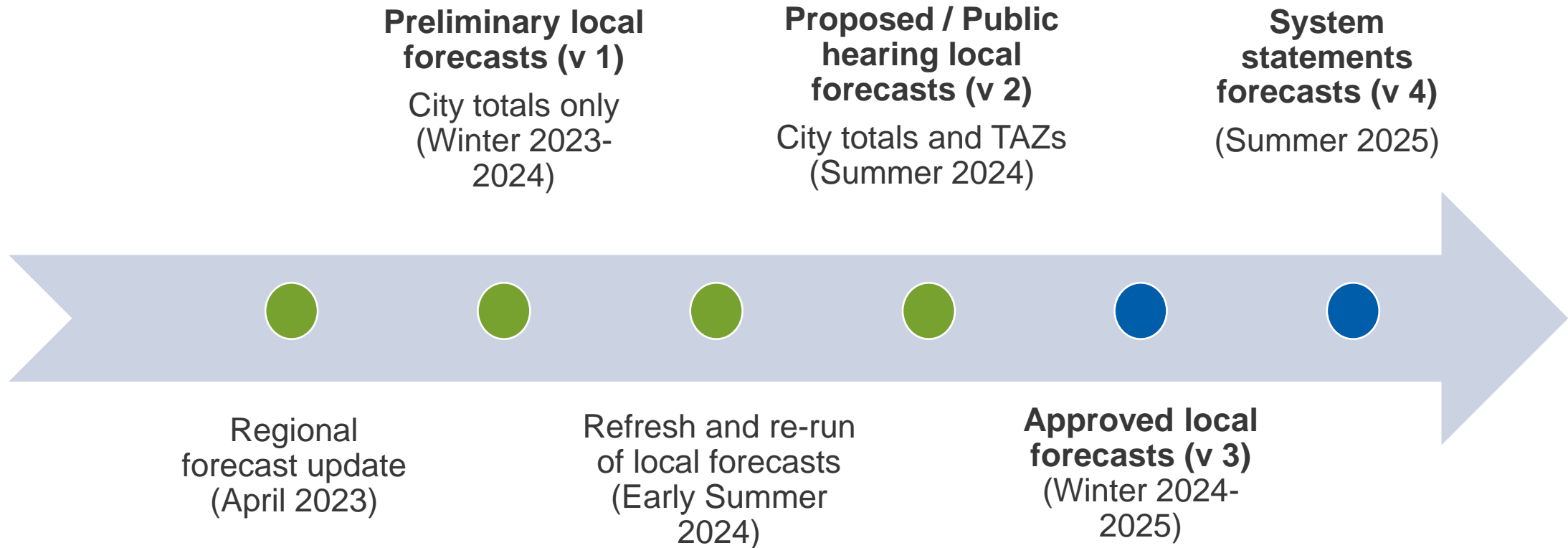
# Population growth to 2050, by county



# Participation of local governments and the public



# Forecast timeline parallels the *Imagine 2050* timeline





# Validation and improvement

## Input that will be most useful to us

- comments on the reasonableness of metrowide patterns
- comments on the reasonableness of local results
- validation or substitution of our data inputs and assumptions, including:
  - inventories of major proposed developments
  - local land use plan maps for 2050
  - local land policies not otherwise apparent in land plan data

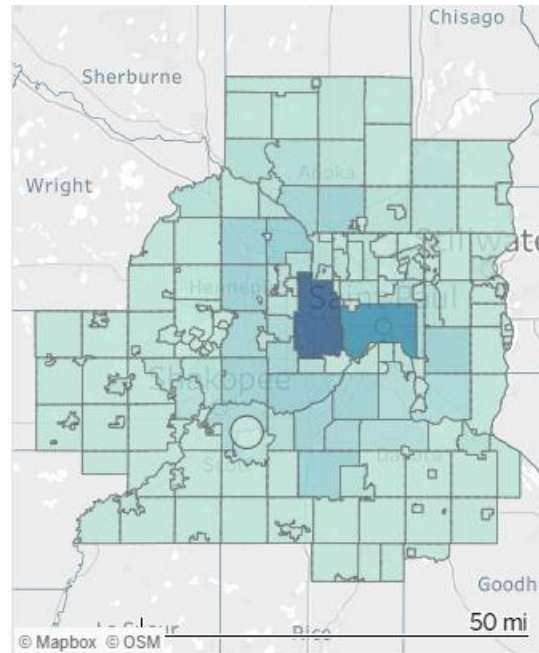
Visit [metro council.org/forecasts](https://metro council.org/forecasts)

Comment [engage.metro council.org/regional-vision-values-goals](https://engage.metro council.org/regional-vision-values-goals)

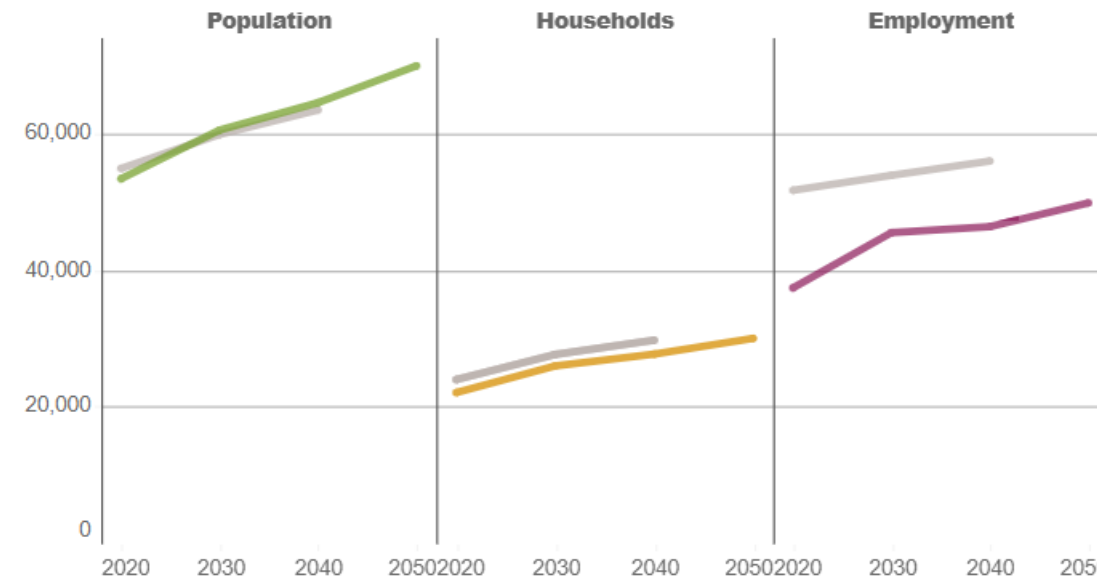
**Explore and comment on proposed local forecasts to 2050**

**Select geographic level**  
 Cities and townships

**Select city or township**  
 Use "all" to reset selections  
 Edina



**Edina**



**Map: Forecast topic**  
 Population

**Map: Forecast year**  
 2050

**Map: Thrive MSP 2040 or Imagine 2050**  
 Imagine 2050

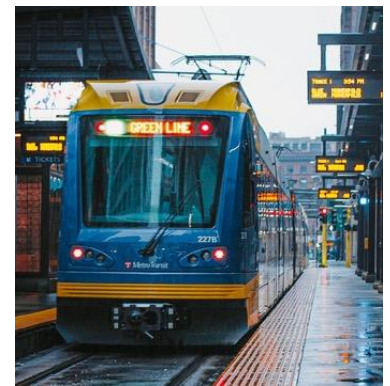
**View forecast data as**  
 Chart

Imagine 2050 (green square)  
 Thrive MSP 2040 (grey square)

Visit [metrocouncil.org/forecasts](https://metrocouncil.org/forecasts)

# Multiple opportunities for adjustments

Jan. – Feb. 29, 2024	<p>Review and comment on <b>Preliminary Local Forecasts v. 1</b></p> <ul style="list-style-type: none"> <li>Includes population, households, employment for counties, cities, townships</li> </ul>
Aug. 15 – Oct. 7, 2024	<p>Review and comment on <b>Proposed Local Forecasts v. 2</b></p> <ul style="list-style-type: none"> <li>Includes population, households, employment for counties, cities, townships and Transportation Analysis Zones</li> <li>Part of public comment period for <i>Imagine 2050</i></li> </ul>
Sept. – Dec. 2025	<p>Review and comment on <b>System Statement Local Forecasts</b></p> <ul style="list-style-type: none"> <li>Includes population, households, employment for counties, cities, townships, subcity sewer-service areas and policy areas</li> <li>Part of appeals period for System Statements</li> </ul>
2026 – 2028*	<p>Preparation and review of Comprehensive Plan Updates</p> <ul style="list-style-type: none"> <li>Met Council and local governments can agree to local forecast revisions as expectations and plans evolve</li> </ul>
2026 – 2034	<p>Preparation and review of Plan Amendments</p> <ul style="list-style-type: none"> <li>Met Council and local governments can agree to local forecast revisions as expectations and plans evolve</li> </ul>





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