

The Last Five Years: Population Growth in the Twin Cities region since 2010

Key findings

Each year, the Research team at Metropolitan Council 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 to estimate both people living in housing units and people living in group quarters (such as people living in nursing homes and college dorms), arriving at an annual estimate of total population for cities and townships across the region.

Our focus	How has the Twin Cities region's population changed since 2010?	Where has population growth occurred in the region since 2010?	How does our population growth compare with other metro areas?
Our findings	<p>The Twin Cities region's population now exceeds 3 million. The region has added almost 156,000 people since 2010, a 5.5% increase. New housing development has not kept pace with new residents, however. The 2015 population estimates confirm our region is on track for the 2020 forecast.</p> <p style="text-align: right;">Pages 2 & 5</p>	<p>Nearly one-third of the region's overall population growth between 2010 and 2015 occurred in the cities of Minneapolis and Saint Paul.</p> <p>Suburban Edge communities such as Blaine and Woodbury also grew considerably since 2010, each with population growth rates over 8%.</p> <p style="text-align: right;">Page 3</p>	<p>Overall, the U.S. population as a whole increased by about 4% between 2010 and 2015. Much of this growth occurred in large metropolitan areas. Our 16-county Twin Cities metro grew more quickly than New York and Chicago but less quickly than peer regions like Denver, Portland and Seattle.</p> <p style="text-align: right;">Page 5</p>

Population growth outpaced new housing development

We estimate the Twin Cities region's total population was about 3,005,000 on April 1, 2015. This is an increase of almost 156,000 people since 2010 (Figure 2). About two-thirds of this population increase was "natural growth," that is, the number of people born was greater than the number of people who died. Another third of our region's population growth between 2010 and 2015 was from net migration (more people moving to the region than leaving it), mostly people from outside the United States moving to the region.

FIGURE 1. METROPOLITAN COUNCIL'S 2015 POPULATION ESTIMATES

	Census April 1, 2010	Estimated April 1, 2015	Change 2010-2015	Percent change 2010-2015
Population	2,849,567	3,005,419	155,852	5.5%
Households	1,117,749	1,176,655	58,906	5.3%
Housing units	1,186,986	1,230,273	43,287	3.6%

Source: Metropolitan Council's 2015 Population Estimates. The final estimates are available at metro council.org/populationestimates and in our Community Profiles at metro council.org/data.

In 2015, the Twin Cities region had 1,176,600 households, up almost 59,000 since 2010. During the same five years, however, new residential development added housing units for just 43,000 new households. The remaining 16,000 new households occupied existing housing, drawing down vacancy rates of the existing housing supply.

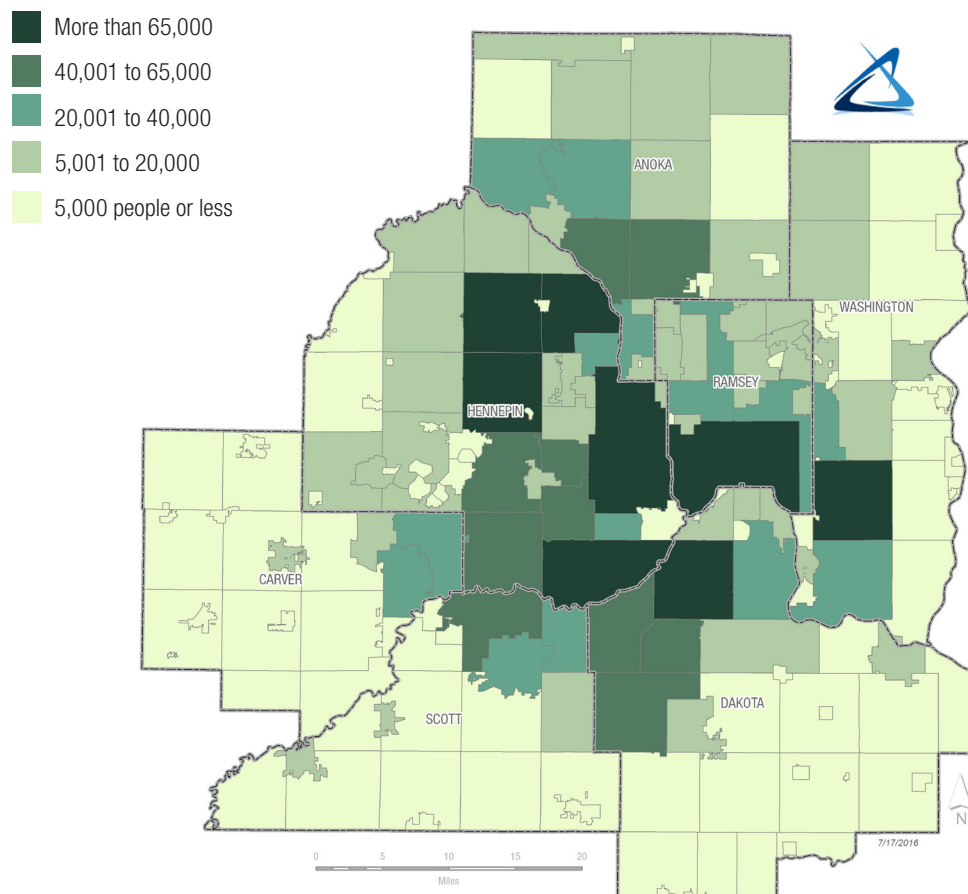
This increased demand for new and existing housing is good news for those selling homes and for the real estate industry. On the other hand, low vacancy and few available homes mean higher housing costs for homebuyers and renters. The region's estimated vacancy rate for all housing types in 2015 was 4.4%, down from 5.8% in 2010. Among cities and townships with at least 10,000 housing units, estimated vacancy rates are lowest—and housing markets are tightest—in Shoreview (2.3%), Eagan (2.5%), Coon Rapids (2.5%), and Savage (2.5%).

Over a third of overall population growth occurred in and around the region's two central cities

Minneapolis and Saint Paul have led the region in population growth since 2010 (Figure 3). In five years, Minneapolis's population increased by almost 30,000, bringing its total population to 412,500—the highest it has been since the 1970s. Saint Paul added nearly 15,300 people between 2010 and 2015, bringing its population to 300,350—also the highest since the 1970s. The growing population in the two central cities reflects both an increased preference for walkable, amenity-rich neighborhoods and new residential construction along the METRO Green Line (the recently opened light rail route connecting Minneapolis and Saint Paul).

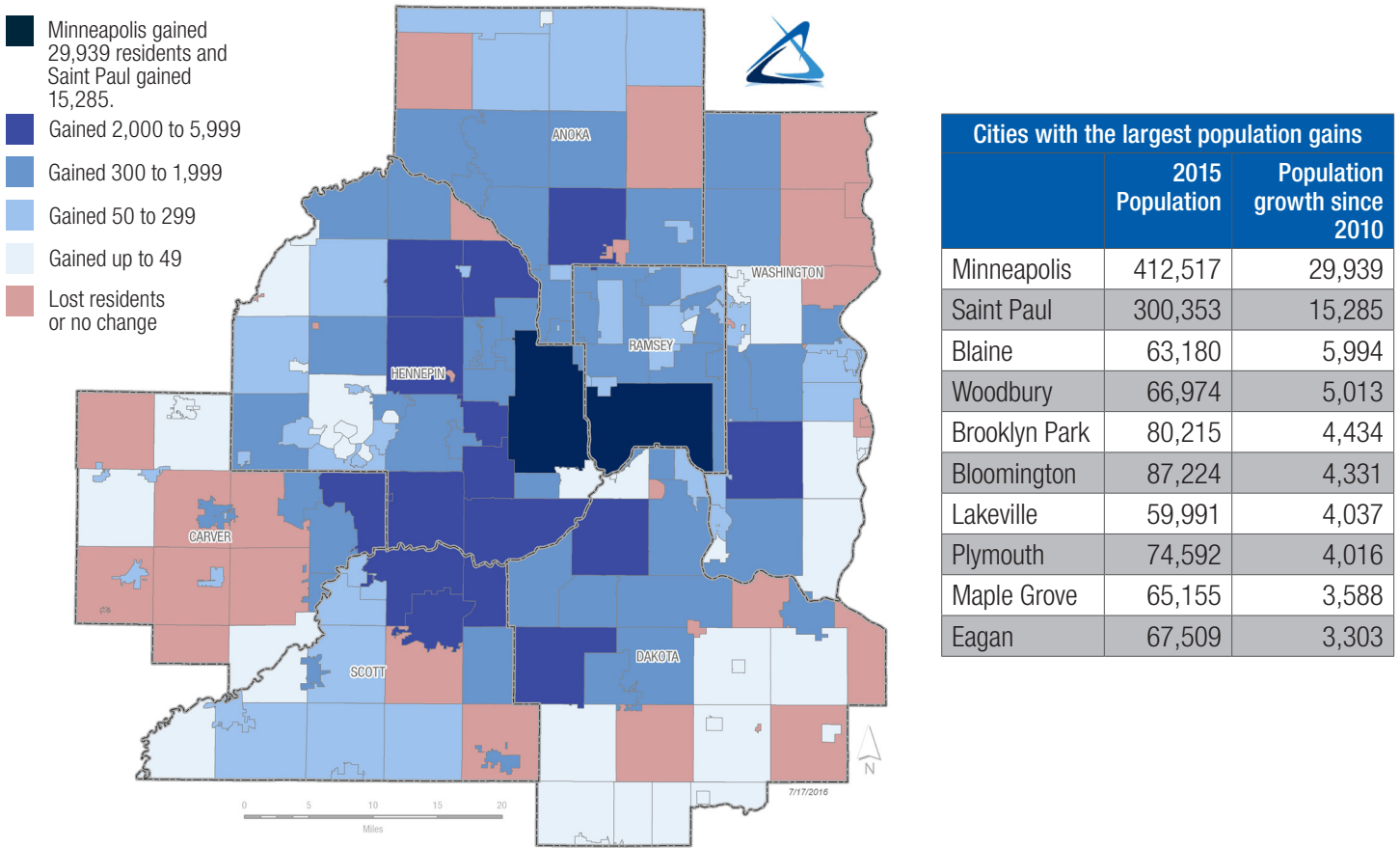
In percentage terms, other cities had a larger increase. For example, Blaine's population increased by 10.5% between 2010 and 2015 while Woodbury's population increased by 8.1%.

FIGURE 2. TOTAL POPULATION BASED ON 2015 ESTIMATES BY CITY AND TOWNSHIP



Source: Metropolitan Council's 2015 Population Estimates. The final estimates are available at metro council.org/populationestimates and in our Community Profiles at metro council.org/data.

FIGURE 3. POPULATION CHANGE BETWEEN 2010 AND 2015 BASED ON ESTIMATES

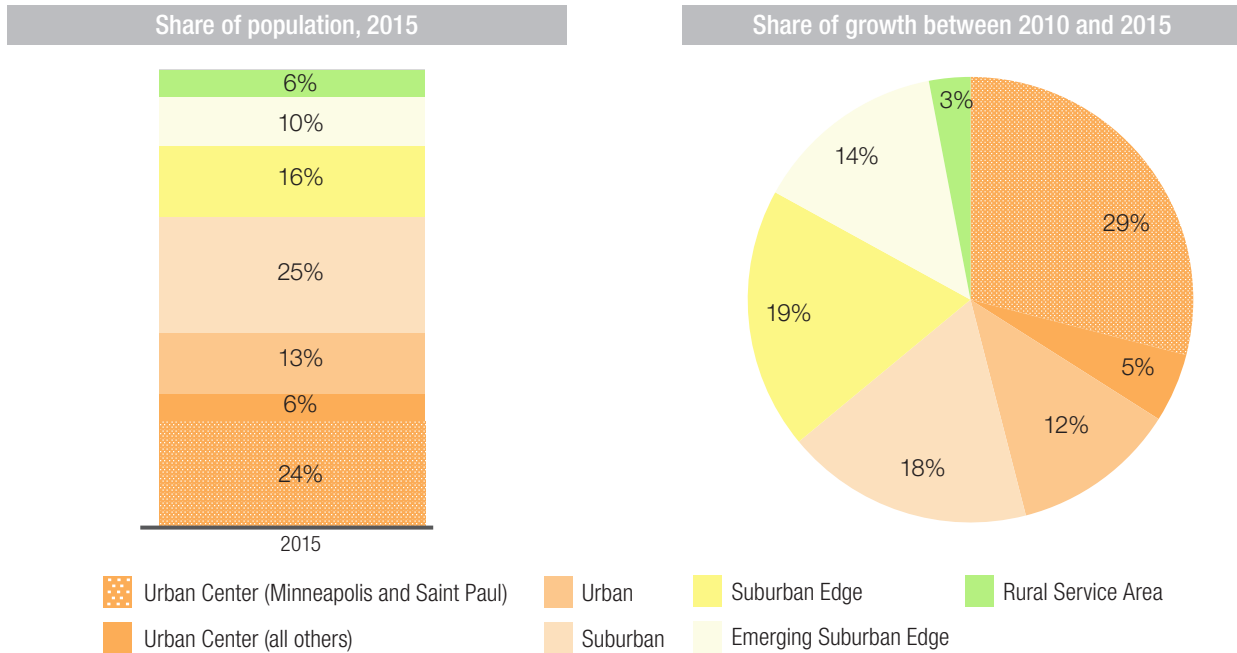


Source: Metropolitan Council's 2015 Population Estimates. The final estimates are available at metro council.org/populationestimates and in our Community Profiles at metro council.org/data.

Together, Minneapolis and Saint Paul accounted for 29% of the region's population growth since 2010 (Figure 4). Other cities with a *Thrive MSP 2040* Community Designation of Urban Center (generally the oldest suburbs) accounted for 5% of the region's population growth since 2010. Leading growth in the other Urban Center cities is St. Louis Park with an increase of 3,104. Among Urban communities (the suburbs that developed after World War II), which saw 12% of the region's growth, Bloomington (+4,331) and Edina (+2,825) added the most new residents. Population change in other Community Designations is as follows:

- Suburban cities—generally suburbs that saw their peak development years in the 1980s and early 1990s—constituted 18% of the region's growth. Growth leaders in this category are Brooklyn Park (+4,434), Eagan (+3,303), and Savage (+3,113).
- Suburban Edge communities—those with more developable land—accounted for 19% of the region's population increase. Cities in this category include Blaine (+5,994) and Woodbury (+5,013). Among Emerging Suburban Edge communities, which captured 14% of the region's growth, growth leaders were Prior Lake (+2,253) and Chanhassen (+2,242).
- As a group, communities in the Rural Service Area, including Rural Centers, accounted for 3% of the region's growth since 2010. Jordan (+680), Ham Lake (+477), and Elko New Market (+445) added the most new residents.

FIGURE 4. POPULATION CHANGE BY COMMUNITY DESIGNATION



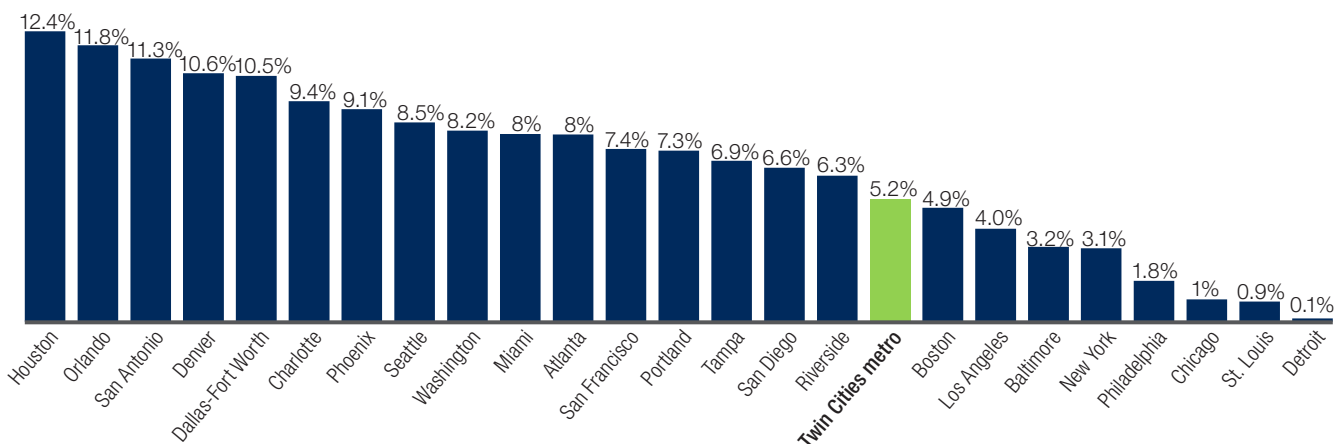
Source: U.S. Census Bureau, Decennial Census, 2010 and Metropolitan Council's 2015 Population Estimates. The final estimates are available at metro council.org/populationestimates and in our Community Profiles at metro council.org/data.

Population growth in the Twin Cities is on par with other major metro areas

Council research estimates population, households, and housing units for the seven-county Twin Cities region; the U.S. Census Bureau provides estimates for all counties and metropolitan statistical areas in the country. According to Census Bureau estimates:

- The United States as a whole added 12.7 million people between 2010 and 2015 (4.1% growth).
- The majority of this population increase was located in the nation's largest 25 metropolitan areas, which added 7.4 million people (5.8% growth) between 2010 and 2015.
- The Minneapolis-St. Paul-Bloomington metropolitan statistical area added nearly 176,000 people between 2010 and 2015, an increase of 5.2%. This growth rate is higher than the national rate but about average for the nation's 25 largest metropolitan areas (Figure 5).
- Our metropolitan area grew more quickly than some older, more established metropolitan areas like Boston, New York, and Chicago, but slower than peer regions like Denver, Seattle, and Portland.

FIGURE 5. POPULATION GROWTH OF LARGE U.S. METROS BETWEEN 2010 AND 2015

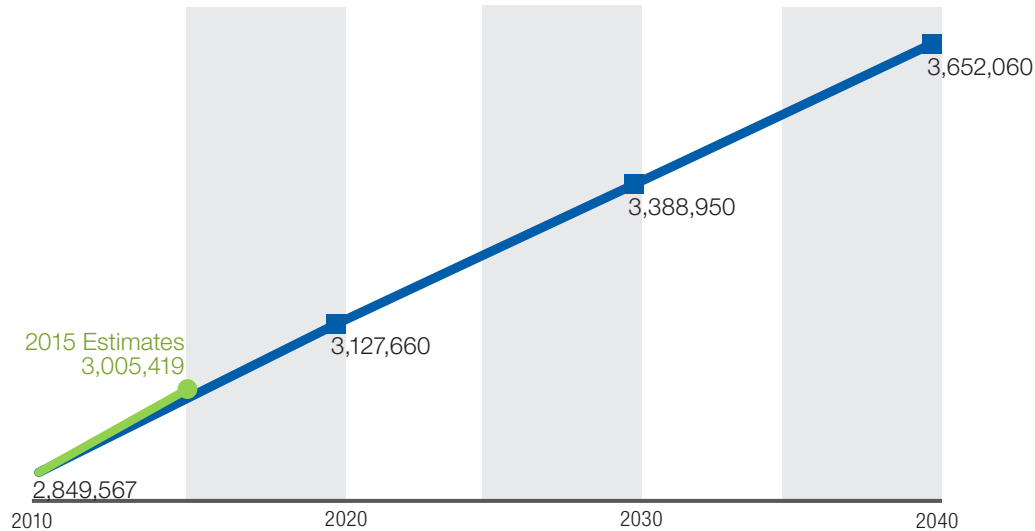


Source: U.S. Census Bureau, Population Estimates, 2015.

The region is on track with forecasted growth

In 2014, we released long-range forecasts for 2020, 2030, and 2040 showing continuing growth throughout the coming decades. According to our 2015 estimates, our region's growth since 2010 has slightly outpaced forecasted growth (Figure 6). The population increase may slow in the coming years if the economy weakens, but after adding more than 155,000 residents in the first half of this decade, the region needs only 122,000 more residents in the second half to reach the 2020 forecast of 3,127,660 residents.

FIGURE 6. TWIN CITIES REGIONAL FORECASTS AND 2015 POPULATION ESTIMATES



Source: U.S. Census Bureau, Decennial Census, 2010; Metropolitan Council's 2015 Population Estimates, and Metropolitan Council Regional Forecast. The final estimates are available at metro council.org/populationestimates and in our Community Profiles at metro council.org/data. The latest forecast is available at metro council.org/forecasts.

About our population estimates

Each year, the Research team at Metropolitan Council estimates the population and households of each city and township in the Twin Cities region. We do this by tracking housing units in detail: we count newly built residential units, housing demolitions and housing units created from former commercial uses. We also track the number of people living in group quarters (such as nursing homes and college dorms).

Once we arrive at a number of housing units, we then use the U.S. Census Bureau's American Community Survey to estimate: 1) the likely occupancy rate of these housing units (households), and 2) the number of people living in them (population in households). The final population estimate includes both people living in housing units and people living in group quarters.

Generally, a city or township's population increases if:

- new housing is added;
- housing vacancy decreases; and/or
- the number of people living in a typical household increases

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