
CENTRAL CORRIDOR FUNDERS COLLABORATIVE

Key Outcomes for the Corridor: 2016 Indicators Report

June 2016

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Table of Contents

Introduction.....	1
ACCESS TO AFFORDABLE HOUSING	3
<i>Share of households by income.....</i>	<i>3</i>
<i>New or preserved long-term affordable housing units.....</i>	<i>5</i>
<i>Activities that help low- and moderate-income households stay in their homes.....</i>	<i>7</i>
<i>Change in median assessed value of single family homes.....</i>	<i>9</i>
<i>Median rental rates (Listed two-bedroom housing units)</i>	<i>10</i>
<i>Average housing plus transportation costs as a percentage of household income.....</i>	<i>12</i>
<i>Tenure status for occupied housing units</i>	<i>14</i>
<i>Household mobility</i>	<i>15</i>
<i>Cost-burdened households.....</i>	<i>16</i>
STRONG LOCAL ECONOMY	17
<i>Percentage of businesses by industry type</i>	<i>17</i>
<i>Percentage of businesses by size (number of employees)</i>	<i>19</i>
<i>Percent change in number of jobs</i>	<i>21</i>
<i>Percentage of low- and moderate-income Corridor residents who work within a commute-shed reachable within 45 minutes by public transit*.....</i>	<i>22</i>
VIBRANT, TRANSIT-ORIENTED PLACES	24
<i>Housing units per acre*</i>	<i>24</i>
<i>Average weekday and monthly rail ridership</i>	<i>27</i>
<i>Average Walk Score® in the Central Corridor*</i>	<i>28</i>
<i>Prevalence of Corridor parks and commons</i>	<i>30</i>
DEMOGRAPHIC CONTEXT	32
<i>Median household income.....</i>	<i>32</i>
<i>Population and race/ethnicity</i>	<i>33</i>
<i>Vehicle Ownership.....</i>	<i>35</i>
<i>Household Type.....</i>	<i>36</i>
DATA NOTES.....	37
APPENDIX.....	40
<i>Access to affordable housing</i>	<i>41</i>
<i>Strong local economy.....</i>	<i>43</i>
<i>Vibrant, transit-oriented places</i>	<i>58</i>
<i>Demographic context.....</i>	<i>60</i>

Introduction

The Central Corridor Funders Collaborative (2007 – 2016) was a group of 14 grant-making organizations that have invested in the development of the corridor surrounding Minneapolis-St. Paul’s second light rail line, now known as the Green Line. They invested in this area based on the belief that the new light rail line offered an opportunity to “strengthen the regional economy and make adjacent neighborhoods better places to live and work.” The Funders Collaborative envisioned a corridor that is a place of opportunity for all, where residents and businesses thrive. The Funders Collaborative pursued this vision by working with a variety of organizations, community groups, coalitions, and public agencies to create and implement corridor-wide strategies. These strategies aimed to ensure that adjoining neighborhoods, residents, and businesses all share in the expected benefits resulting from light rail transit (LRT).

The Funders Collaborative promoted learning, so decisions affecting the Corridor were informed and far-sighted; built shared solutions through the creation of corridor-wide strategies and goals; and invested capital through the Catalyst Fund. Through these activities it sought to achieve the following four outcomes in the Central Corridor:

- Access to affordable housing
- Strong local economy
- Vibrant, transit-oriented places
- Effective coordination and collaboration

Tracking outcomes in the Corridor:

To assess progress on these outcomes, the Funders Collaborative has worked with Wilder Research over the past six years to develop, report, and update measures for the desired outcomes. This is the fifth report in a series tracking change along the Corridor. This report, documenting changes in 2015, coincides with the first full calendar year of the light rail’s operation. The accompanying “Central Corridor Tracker” summarizes the more detailed information contained here.

Notes on methods:

Work has included identifying key questions related to the outcomes, determining indicators and data sources, gathering and analyzing data, and reporting results. Indicators were selected not only for their “goodness of fit” with the outcomes, but also with attention to whether they are straightforward to understand or interpret. Additionally, the data source for each indicator needed to be available for small geographic areas (e.g., blocks, block groups, or census tracts) and updated on a relatively timely basis to meet the objective of tracking changes along the corridor. While the intention of this report is to track changes in the same indicators over time, new data sources are continually being developed and have been included in annual updates to this report as appropriate. To guide the data gathering and analysis, each indicator has associated with it a “key question.” These key questions are included at the top of each indicator page, along with the associated outcome.

Throughout the report the indicators are shown for each of six major “segments” of the Corridor. These six segments are closely aligned with sub-market analysis conducted for the Central Corridor Funders Collaborative’s Investment Framework. The segments are: Downtown Minneapolis; University of Minnesota and Environs, which includes the University of Minnesota and Prospect Park; Midway West, comprised of parts of the St. Anthony and Union Park neighborhoods; Midway Central, which includes Hamline University and parts of the Hamline-Midway and Union Park neighborhoods; Midway East, which includes much of Frogtown and Thomas-Dale neighborhoods; and Downtown St. Paul. In addition, most indicators also present comparable data for the cities of Minneapolis and St. Paul combined.

Note that while this report features the most recent data available for each indicator, the dates vary somewhat from indicator to indicator. We refer to the data reported in the 2011 document as “Baseline” and the data in subsequent reports as “Year 2,” “Year 3,” “Year 4,” “Year 5”, and “Year 6” (this year’s report). In some cases both Baseline and Year 2 measures are pre-construction and in other cases they are not. Detail of the source-years, indicator by indicator, can be found in the Appendix. The Appendix also includes maps of the areas covered by this report

The Central Corridor Funders Collaborative was a funder initiative from 2007- June 2016.

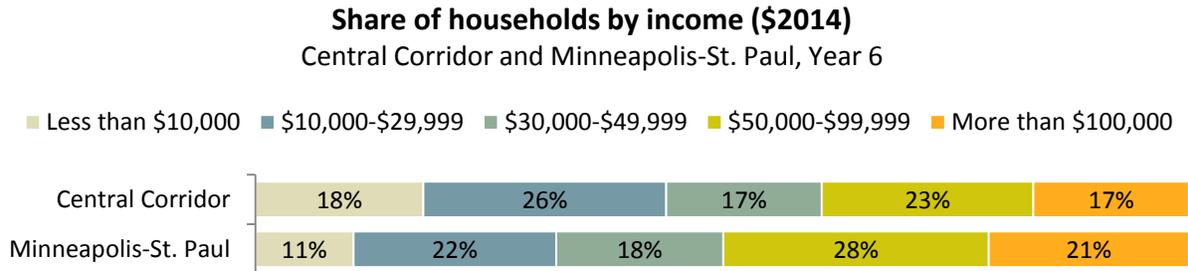
Members included: The Annie E. Casey Foundation · The Bush Foundation · F.R. Bigelow Foundation · Ford Foundation · Jay and Rose Phillips Family Foundation · John S. and James L. Knight Foundation · Living Cities, Inc. · McKnight Foundation · The Minneapolis Foundation · Northwest Area Foundation · Otto Bremer Foundation · The Saint Paul Foundation · Surdna Foundation · Travelers Foundation

Access to affordable housing

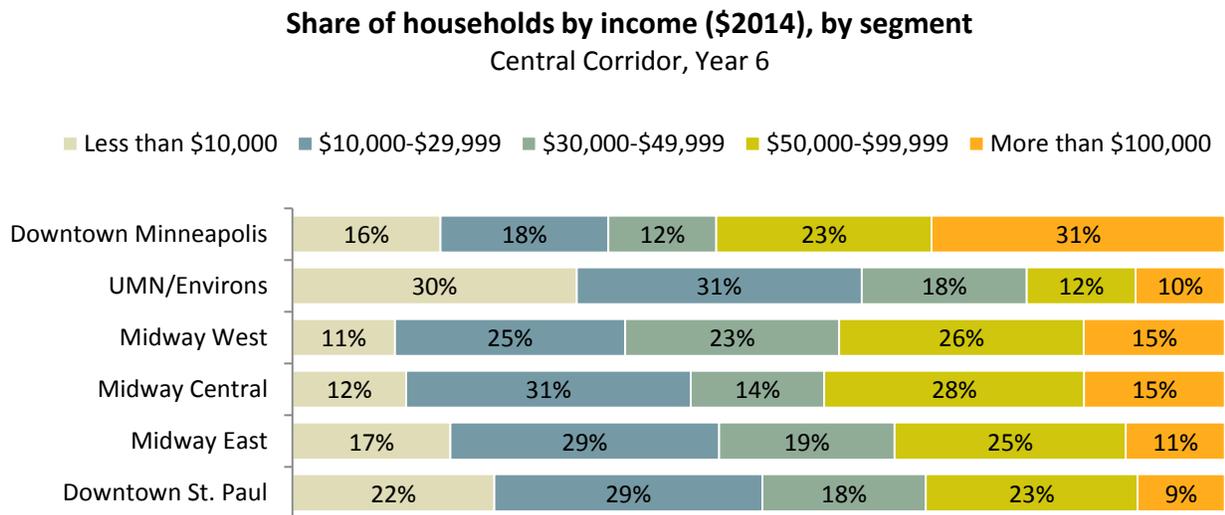
Outcome: Mix of household incomes

Indicator: Share of households by income

Key Question: Are low-income people still able to live near the Central Corridor?



Source: U.S. Census Bureau, American Community Survey 2010-14 5-year estimates.



Note: Income adjusted to 2014 dollars. See Appendix for comparisons with Baseline and data source explanations. Totals may not equal 100 percent due to rounding.

Overall Corridor:

- The Central Corridor continues to host a range of household incomes, including substantial shares at both the high and low end of the income spectrum.
- Although the best available data for tracking income along the Corridor generally is not sensitive to annual changes among these relatively small populations, the mix of incomes has not shown signs of dramatic change over the course of the Tracker reports. The median household income in the Corridor is \$41,762 which is statistically unchanged since the Baseline report.

- Proportionally, the Central Corridor is home to far more low-income households than is the case for Minneapolis and Saint Paul as a whole. Eighteen percent earn less than \$10,000 per year, and another 26 percent of Corridor households earn less than \$30,000 per year.
- The cities of Minneapolis and St. Paul have a slightly larger share in the top of the income category than the Corridor; 21 percent of the households in the two cities earn more than \$100,000, compared with 17 percent of Corridor households.

By Segment:

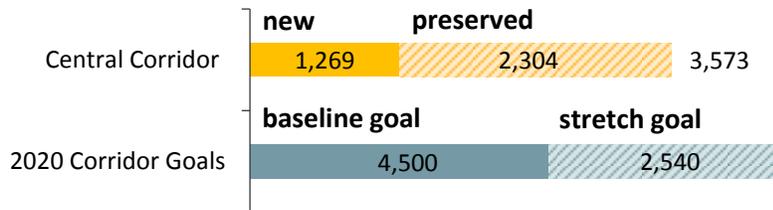
- Again, although the best available data for tracking income along the Corridor generally is not sensitive to annual changes, the mix of incomes within the six segments has not shown signs of shifting dramatically since Baseline.
- Downtown Minneapolis is the highest income segment in the Central Corridor, and the only segment surpassing the combined cities of Minneapolis and St. Paul. Thirty-one percent of Downtown Minneapolis households earn more than \$100,000 per year; this is nearly half (47%) of all highest-income category households in the entire Corridor.
- The neighboring UMN/Environs segment is the lowest income segment in the Corridor, with 61 percent of all households earning less than \$30,000 per year and just ten percent earn more than \$100,000 per year. This is likely a reflection of the large student population as well as the prevalence of subsidized housing in that segment.
- The four remaining segments (Midway West, Midway Central, Midway East, and Downtown St. Paul) share more similarities in income distribution than Downtown Minneapolis and UMN/Environs. Moving east through the four segments, distribution of income shifts and households are more likely to be in the two lowest income categories.

Outcome: Housing with enduring affordability is available to current and future residents

Indicator: New or preserved long-term affordable housing units

Key Question: Are investments being made towards long-term affordable housing options along the Central Corridor?

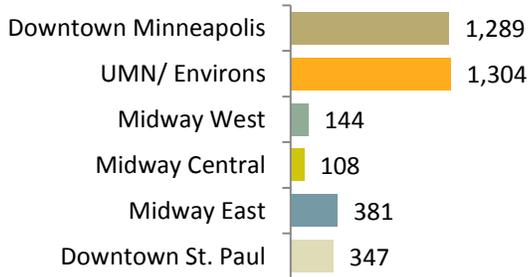
New and preserved affordable units*
Central Corridor unit comparison to Big Picture Project Goals, 2011-2015



Source: The Big Picture Project Progress Report 2016: Wilder Research on behalf of Twin Cities LISC.

*An affordable housing unit is defined by the Metropolitan Council as affordable to a household earning less than or equal to 60% of the Area Median Income.

New and preserved affordable units, by segment*
Central Corridor, 2011 - 2015



Note:

This indicator is drawn from The Big Picture Project Progress Report 2015, which reports progress on the Central Corridor Affordable Housing Coordinated Plan. The Big Picture Project is led by the Twin Cities Local Initiatives Support Corporation (LISC), with involvement from the cities of Minneapolis and St. Paul, and is supported by the Central Corridor Funders Collaborative.

Overall Corridor:

- From 2011 through 2015 financing has been closed on 3,573 new or preserved affordable units along the Corridor, which exceeds the Big Picture Project's original goal by more than 1,000 units, and fulfills nearly 80 percent of the 2020 stretch goal.
- Almost two-thirds of the Corridor total are preserved units, with the number of preserved units growing by more than 500 units from 2014 to 2015. Riverside Plaza, which was completed in 2011, accounts for just over half of all preserved units.
- Approximately 600 new affordable housing units were added to the Corridor housing stock in 2015, nearly doubling the previous year's count.
- The Corridor needs an additional 927 affordable units to be created or preserved over the next five years to meet the stretch goal. That is an average pace of 185 units per year. This seems attainable given that, even when removing the large Riverside Plaza from the count, an average of over 450 units have been produced or rehabilitated along the corridor each of the past five years.
- In addition to the number of units produced or preserved, there are several active projects in the development pipeline, accounting for 1,514 units at the end of 2015. The completion of these units will exceed the stretch goal of 4,500 units. The pipeline count is down from the 1,778 units in 2014; 478 units from last year's pipeline moved to production in 2015.

By Segment:

- Even though no new or preserved units were produced in UMN/Environs in 2015, it still has the largest share of total new and preserved affordable units, mainly due to the 2011 Riverside Plaza preservation project.
- This past year's near 600-new unit gain across the Corridor is attributed to six projects that came online in three separate segments: Downtown St. Paul (phase 1 of Dorothy Day; 193 units), Midway West (Westgate Station; 50 units, and Prior Crossing; 44 units), and Downtown Minneapolis (Mill City Quarter/Abiitan; 301 units, and The Cameron; 44 units).
- A total of 832 units of affordable housing were added in downtown Minneapolis in 2015, more than any other segment. Nearly 500 preserved units were added as part of Aeon's Balmoral renovation, and 345 new units were added through three new construction projects (Mill City Quarter, Mill City Abiitan, and The Cameron).
- There are major pipeline projects planned for all six segments: Dorothy Day Phase II in Downtown St. Paul (166 units); Wilder Square and Jamestown Homes preservation projects in Midway East (136 units and 73 units respectively); Skyline Tower in Midway Central (504 units); Aeon at Vandalia and University in Midway West (130 units), and Glendale Townhomes preservation in UMN/Environs (184 units), and Great River Landing and House of Charity in Downtown Minneapolis (72 and 60 units, respectively).

Outcome: Residents are able to stay in their homes

Indicator: Activities that help low- and moderate-income households stay in their homes

Key Question: Are investments being made towards activities that help residents stay in their homes?

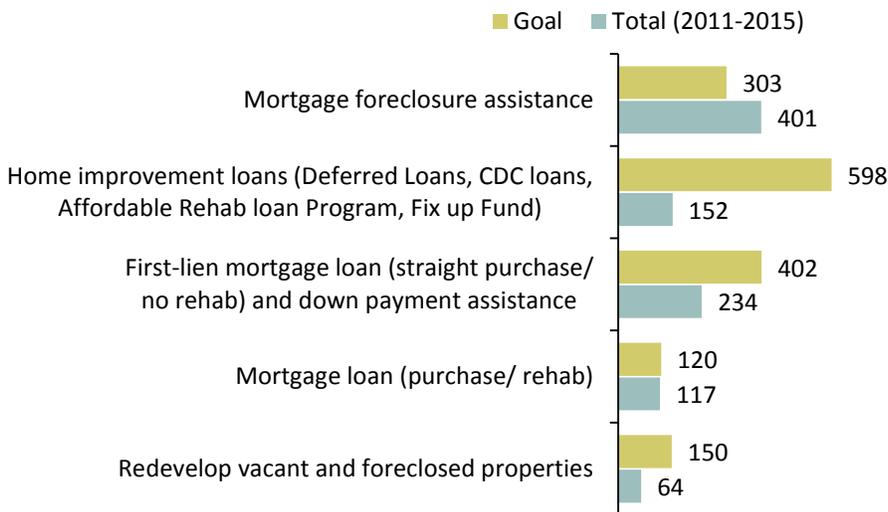
Total households served by Homeownership Assistance Activities

Central Corridor comparison to Big Picture Project Goal, 2011-2015



Homeownership assistance activities for low- and moderate-income households, by type

Central Corridor comparison to Big Picture Project Goal, 2011-2015



Source: Big Picture Project Progress Report 2016. Wilder Research on behalf of Twin Cities LISC.

Note:

The Big Picture Project's second objective is to "stabilize the neighborhood and invest in activities that help low-income people stay in their homes." Working towards this objective, the project established an overall goal to serve 1,573 low- and moderate-income households (primarily in St. Paul) over a ten-year period through a combination of public sector resources.

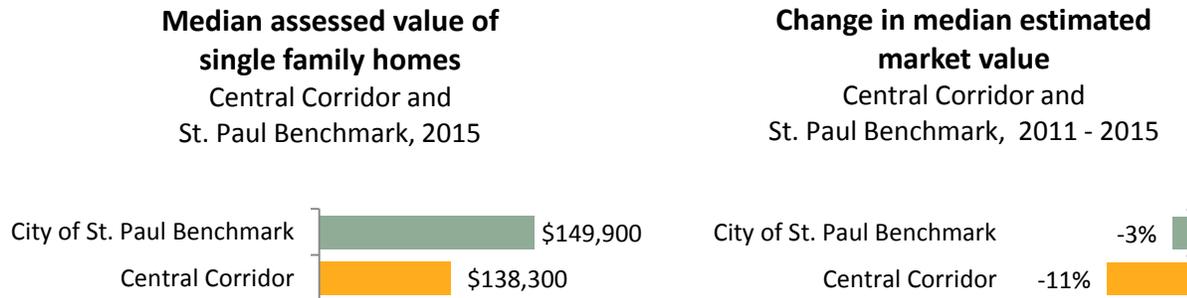
The Big Picture Project service goal is made up of several different programs and services, each with their own goal for service; these programs include mortgage foreclosure prevention, strategies to address vacant and foreclosed properties, home improvement loans including those that would improve energy efficiency, and other investments. This year the Twin Cities Community Land Bank's single-family acquisition, loan, and grant activities were added across all years in the "redevelopment of vacant/foreclosed properties" category. Also note that the federally-funded Neighborhood Stabilization Program, which accounted for most of the activity in this same category between 2011 and 2013 has since ended.

While it is technically possible that one household may have been assisted through two or more of these programs, each "service incident" is counted as assistance to one household for purposes of tracking progress toward the overall goal.

Overall Corridor:

- From 2011-2015, providers have served 968 households in the corridor through the identified stabilization programs and services, including 221 households in 2015.
- Service providers continue to make progress in all five focus areas on an annual basis, but still have ground to cover. Only one area—mortgage foreclosure assistance—has reached the 2020 goal, serving 401 households through 2015. A second area – mortgage loans (straight purchase or rehab) – is three households from reaching its goal.

Outcome: Residents are able to stay in their homes
Indicator: Change in median assessed value of single family homes
Key Question: Is property tax pressure impacting residents' ability to stay in their homes?



Source: Big Picture Project Progress Report 2016. Wilder Research on behalf of Twin Cities LISC.

Note:

We track change in estimated market value as proxy for property tax change, as well as potential pressure to sell. The City of St. Paul was selected as the benchmark for this indicator due to predominance of single family parcels within the St. Paul portion of the Corridor. The Big Picture Project’s reporting has thus far focused on Corridor-wide change. Note that for purposes of comparison, assessed median values are inflated to 2015 dollars.

Overall Corridor:

- Overall, median assessed value of single family homes in the Corridor remains 11 percent below the 2011 Baseline.
- Median assessed home value in the Corridor bottomed out in 2013, and then increased by six percent in 2014. The Corridor’s median assessed home value was stable from 2014 to 2015.
- While median market values were relatively similar for St. Paul and the Corridor at Baseline (approximately \$154,000), the median assessed single family home values for St. Paul now exceeds that of the Corridor by roughly \$11,000.

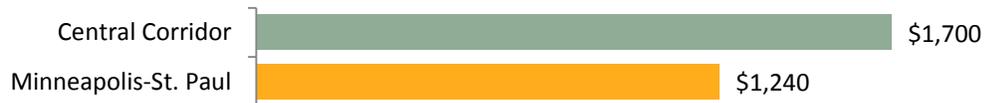
Outcome: Residents are able to stay in their homes

Indicator: Median rental rates (Listed two-bedroom housing units)

Key Question: Are market fluctuations impacting residents' ability to stay in their homes?

Median rental rates for listed, two-bedroom units

Central Corridor and Minneapolis-St. Paul, 2015



Median rental rates for listed two-bedroom units, by segment

Central Corridor, 2015



Source: Big Picture Project Progress Report 2016. Wilder Research on behalf of Twin Cities LISC.

Note:

This indicator is comprised exclusively of advertised rental listings, providing a snapshot of a prospective renter's options when looking for a two-bedroom housing unit at a given point in time; it does not include rental rates or rates of change for existing, occupied units. Rising rates for advertised units does not necessarily indicate that renters along the corridor are being forced out of their current situation by rising rents.

The data are sensitive to fluctuations in the broader housing market, including the impact of new construction. Note that for purposes of comparison, median rental rates are inflated to 2015 dollars.

Overall Corridor:

- The Corridor has seen a dramatic increase in median rental rates for advertised two-bedroom housing units to \$1,700, which reflects an increase of 44 percent over available units at Baseline. This compares to a more modest 24 percent increase for the cities of Minneapolis and St. Paul on the whole.
- Increased advertised rents are driven at least in part by the construction and listing of a number of new higher-end construction projects and luxury conversions in the downtown and university areas.

- High rent units (over \$1,995) make up a growing share of available units on the corridor since Baseline, growing from 16 percent of the market in 2011 to 32 percent in 2015.

By Segment:

Note:

Due to the small number of advertised listings, the Big Picture Project consolidates Downtown Minneapolis and the UMN/Environs segments; the three Midway segments are likewise consolidated.

- Three-quarters of above-median rents are located in the combined Downtown Minneapolis/University of Minnesota Environs, highlighting the construction boom of luxury and “boutique” units downtown (including multiple units at the Ivy and Bridgewater luxury condominium buildings, as well as Velo, Dock St. Flats, and Brunfield in the North Loop neighborhood) and the prevalence of new higher-end student housing development around the University (including Northstar lofts, and Solhaus and Solhaus Tower).
- Downtown St. Paul experienced the largest percentage increase in median advertised rent of all segments (38% from 2011 to 2015). This increase is based on a small subset of relatively high-priced rental units, reflecting a number of new construction and high-end conversions. Rental units include the Penfield, Sibley Park, Mears Park Place, Sibley Park apartments, and the Cosmopolitan Saint Paul.
- Available listings within the Midway segments have also risen over baseline. However, at a median monthly rate of \$1,099, they remain roughly 35 percent below the corridor median, and more than 10 percent below the Minneapolis-St. Paul benchmark.

Outcome: Housing with enduring affordability is available to current and future residents
Indicator: Average housing plus transportation costs as a percentage of household income
Key Question: Is it affordable to live in the Central Corridor?

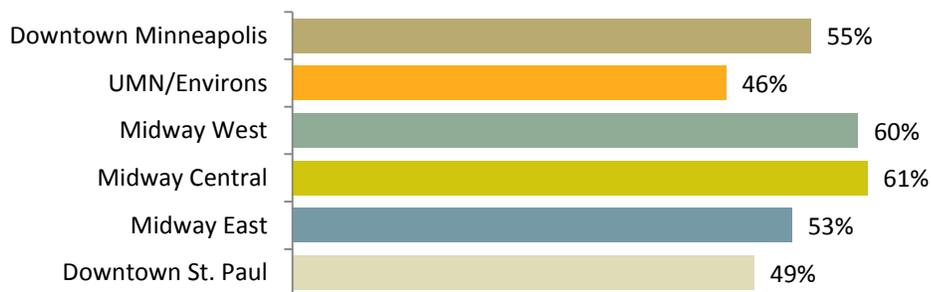
Housing and transportation costs as a percentage of income for low-income households*
 Central Corridor and Minneapolis-St. Paul, Year 5



Source: Housing + Transportation Affordability Index, Center for Neighborhood Technology (CNT), Chicago, IL.

* Low-income households are those making 60 percent of area median income. Area Median Income relates to the median for the Minneapolis-St. Paul Core-Based Statistical Area, as per CNT data and guidance. Results reported in the figure assume an average household size of 2.53 people and 1.24 commuters. **NOTE: this data source is unchanged from Year 5 of the Key Outcomes Report.**

Housing and transportation costs as a percentage of income for low-income households*, by segment
 Central Corridor, Year 5



Note:

A combined housing and transportation cost in excess of 45 percent of income is generally considered unaffordable. At Baseline, estimated housing and transportation costs for low-income households in the Corridor accounted for 44 percent of household income, just below the threshold of affordability.

Overall Corridor:

- According to the Housing and Transportation Affordability Index (H+T), the Corridor is considered unaffordable for lower-income households. For households earning 60 percent or less of area median income (approximately \$40,000), the cost of housing and transportation averaged 53 percent of household income over the 2009-2013 timeframe.
- The Corridor’s H+T cost increase follows that of the Minneapolis-St. Paul metropolitan area, though the metro area is more expensive than the Corridor as a whole or any of its segments.

- It should be noted that many households along the Corridor earn less than 60 percent of the area median income, so while the Corridor may be considered affordable for some lower-income households, it may not be affordable for all lower-income households.

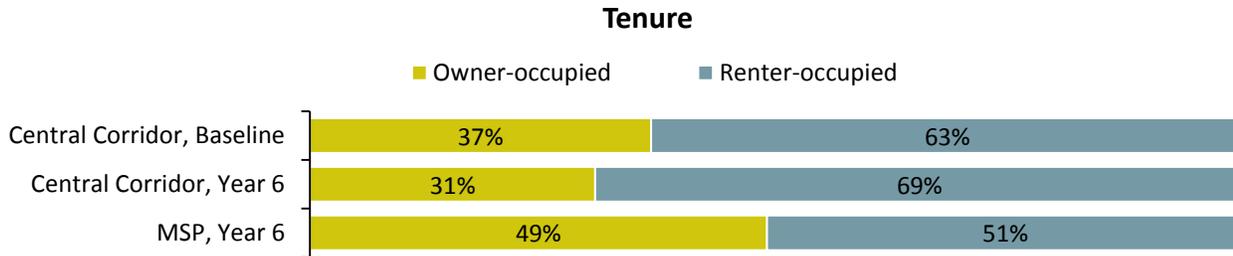
By Segment:

- All Corridor segments exceed H+T's 45 percent affordability threshold. Low-income households in the UMN/Environs spend the least on housing and transportation expenses (46%).
- Location along the Corridor makes a substantial difference in the share of income that is spent on transportation. Low-income households in the Midway segments are estimated to spend more than 20 percent of income on transportation-related expenses, while low-income households in Downtown Minneapolis spend just 16 percent (but spend 39% on housing).
- Estimates suggest that the combined costs of housing and transportation are increasing throughout the Corridor. Three segments—Downtown Minneapolis, Midway West and Midway East—increased by more than 10 percentage points over Baseline.
- Downtown Minneapolis has seen the largest increases in H+T costs, primarily due to increases in housing, while UMN/Environs saw the smallest increases. Transportation cost increases were highest in the Midway Central segment.

Outcome: A mix of owners and renters lives here

Indicator: Tenure status for occupied units

Key Question: Are both owner- and renter-occupied households able to live along the Corridor?

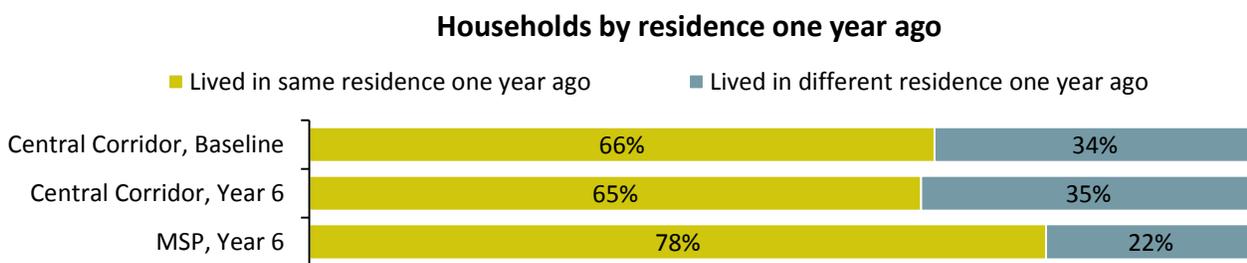
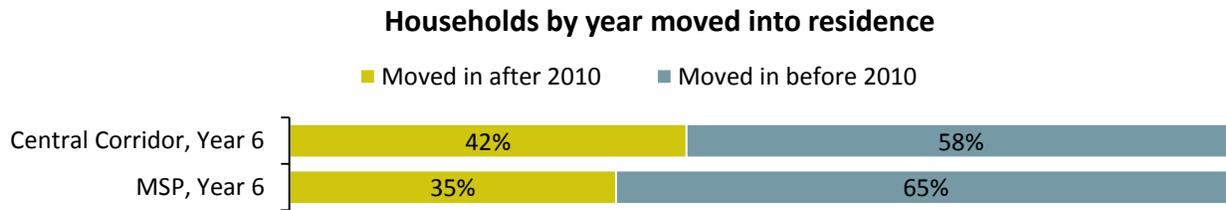


Source: U.S. Census Bureau, American Community Survey, 2005-2009 (Baseline) & 2010-14 (Year 6).

Findings:

- Overall, the Central Corridor has experienced a slight shift toward renter-occupancy since Baseline – as of Year 6, the proportion of households that are renter-occupied has grown by 6 percent. A dramatic shift toward renter-occupancy can be a warning sign of growing displacement of longtime neighborhood residents.
- The Central Corridor is more heavily renter-occupied than Minneapolis and St. Paul combined, with a difference of 18 percentage points between the Central Corridor and MSP.

Outcome: Resident stability is monitored
Indicator: Households by year moved into unit
Key Question: How is household mobility changing relative to Minneapolis-St. Paul?

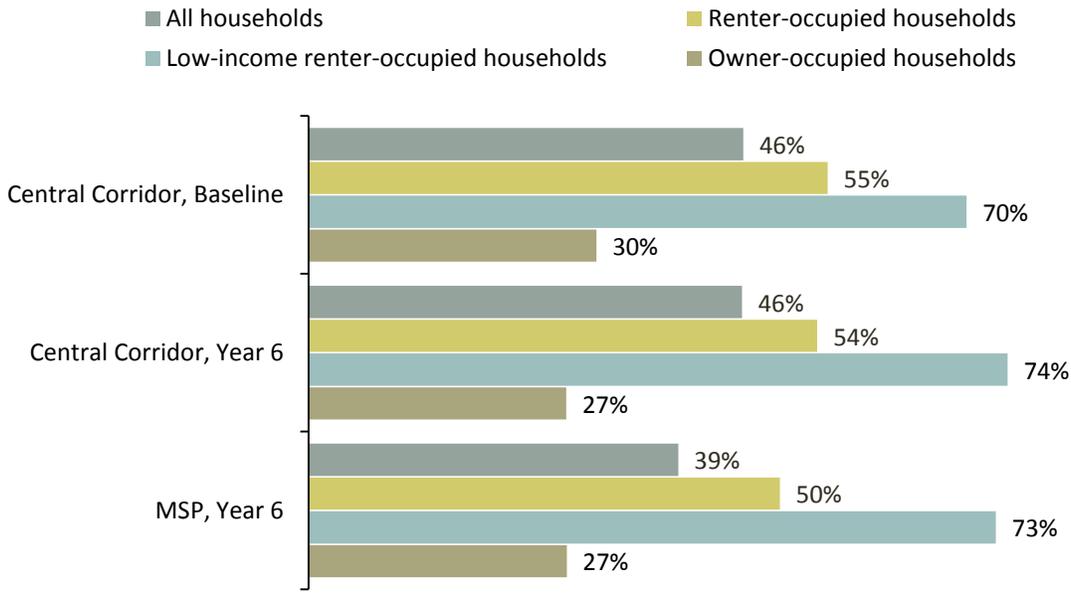


Findings:

- As of Year 6, proportionally more households in the Corridor have moved into their current residence after 2010 than households in Minneapolis-St. Paul combined; that is, on the whole households in the Corridor are more mobile in the medium-term than households in Minneapolis-St. Paul.
- Year-over-year household residence turnover in the Corridor remains consistent with Baseline, but these data suggest that Corridor households are also more mobile in the short-term than households in Minneapolis-St. Paul combined.

Outcome: Cost-burdened households reflect Minneapolis-St. Paul
Indicator: Share of households' income spent on housing, by tenure and income
Key Question: Does housing cost burden differ from Minneapolis-St. Paul?

Share of households paying 30% or more of their income for housing



*Low-income renter-occupied households refer to renter-occupied households with incomes below \$50,000.
 Source: U.S. Census Bureau, American Community Survey, 2005-2009 (baseline) & 2010-14 (Year 6).*

Findings:

- Since Baseline the share of all households paying more than 30% of their income for housing has remained constant; that is, across the board Corridor households are not seeing relief when it comes to the portion of their incomes spent on housing.
- As of Year 6, the share of Corridor households that are housing cost-burdened is more than 5 percentage points higher than for Minneapolis-St. Paul combined.
- In the Corridor, roughly 1 out of every 5 owner-occupied households is cost-burdened; this proportion jumps to nearly 3 out of 4 for low-income (under \$50,000) renter-occupied households.
- Low-income renter-occupied households are struggling outside of the Corridor as well – roughly the same proportion (73%) are cost-burdened in Minneapolis-St. Paul combined.

Strong local economy

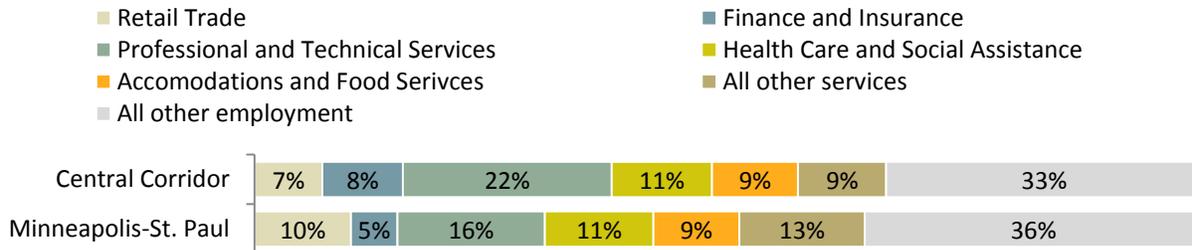
Outcome: Mix of businesses

Indicator: Percentage of businesses by industry type

Key Question: Does the Corridor provide a mix of services for residents?

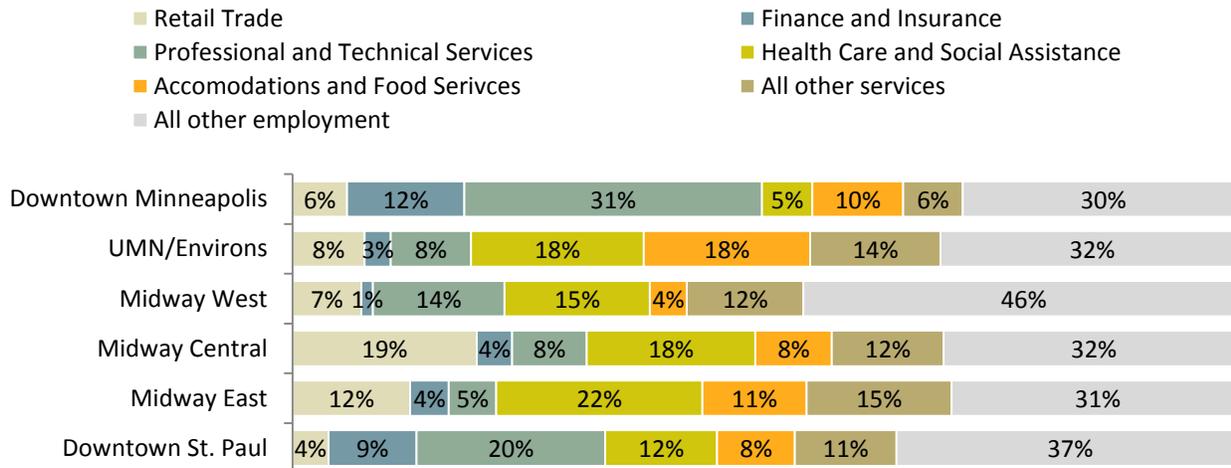
Business establishments by type*

Central Corridor and Minneapolis-St. Paul, Year 6



Business establishments by type,* by segment

Central Corridor, Year 6



Source: Employment data from Minnesota Department of Employment and Economic Development's Quarterly Census of Employment and Wages data as geocoded and compiled by the Metropolitan Council, 2009-2014. Previous years of data are back-revised to account for improved locating of establishments.

*Data by industry only shown for the six largest categories. See Appendix for additional notes and explanation.

Note:

These figures include establishments located in both Downtown Minneapolis and Downtown St. Paul, as well as business changes as far north as Pierce Butler Route and as far south as Selby Avenue.

From Baseline to Year 6, the Corridor has seen a 4 percent net loss of establishments.

Overall Corridor:

- In the sixth year of this report, the mix of business types along the Corridor has changed very little, despite the four percent net loss in establishments during that time.
- Professional and technical services are the single largest category of establishments in the Corridor, comprising 22 percent of all establishments.
- The Corridor has seen a loss of finance and insurance establishments, and small net declines in retail. On the other hand, there have been modest increases in the number of establishments in professional and trade services, health care and social assistance, and accommodations and food services.
- The Corridor's losses in finance and insurance establishments are similar in magnitude for the cities of Minneapolis and St. Paul on the whole; there have been yearly net losses in this establishment type both on the Corridor and across the two cities.
- The Corridor's net gains in professional and technical services establishments is at odds with the trend in the rest of Minneapolis and St. Paul, where more than 100 establishments have been lost between Baseline and Year 6.
- Growth in health care and social assistance establishments in the Corridor has mirrored increases in Minneapolis and St. Paul. Nearly 1 in 3 of the cities' health care and social assistance establishments are located in the Corridor.

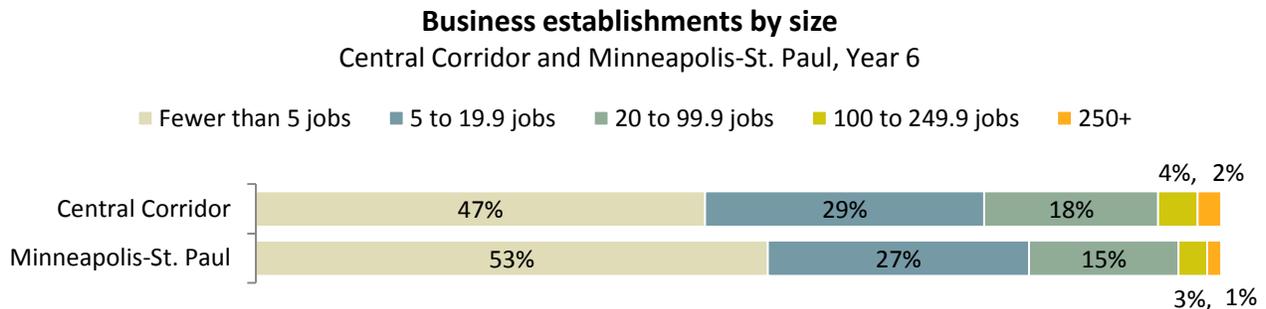
By Segment:

- Among the six segments, the two downtowns continue to have had the largest net losses of establishments from Baseline to Year 6; Downtown St. Paul experienced a loss of 9 percent and Downtown Minneapolis has 3 percent fewer establishments than six years earlier. The largest portion of those losses was among finance and insurance establishments.
- Midway Central saw net a gain in establishments since the Baseline, mainly among retail trade establishments.
- Midway East saw increases in accommodations and food services establishments, and was the only segment to see a net gain in finance and insurance establishments since Baseline.
- By contrast, Midway West, UMN/Environs, and Downtown Minneapolis have seen net losses in establishments of two to three percent since Baseline. The majority of the losses were in finance and insurance as well as professional and trade services.

Outcome: Mix of businesses*

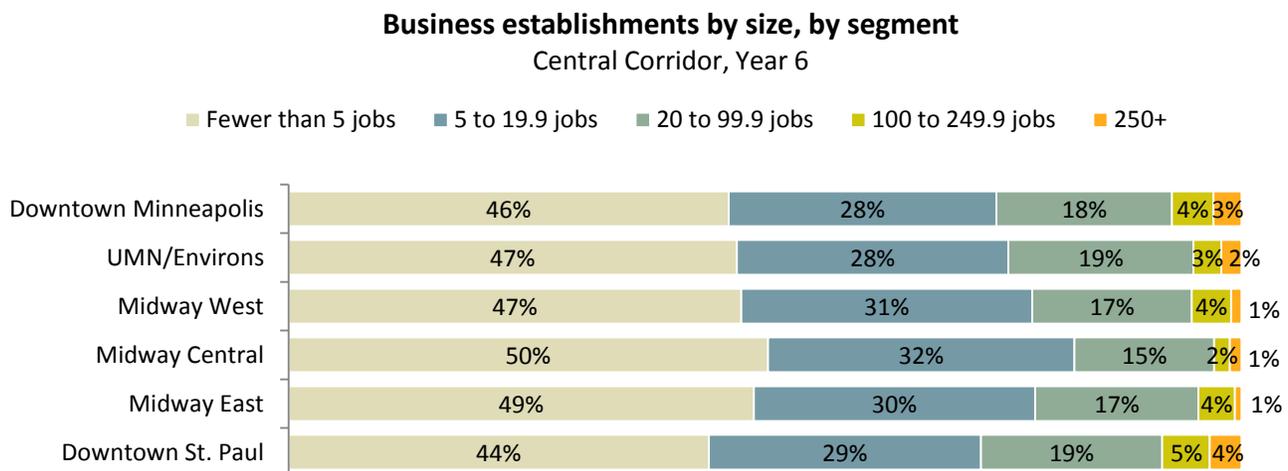
Indicator: Percentage of businesses by size (number of employees)

Key Question: Does the Corridor provide a place for small businesses to thrive?



Source: Employment data from Minnesota Department of Employment and Economic Development's Quarterly Census of Employment and Wages data as geocoded and compiled by the Metropolitan Council, 2009-2014. Previous years of data are back-revised to account for improved locating of establishments.

* See Appendix for additional data, including number of businesses by size, by segment.



Note:

These figures include establishments located in both Downtown Minneapolis and Downtown St. Paul, as well as business changes as far north as Pierce Butler Route and as far south as Selby Avenue.

It is possible that some of the change reported here is due to establishments' fluctuation in employee headcount, shifting them from one size category to another over time.

Overall Corridor:

- From Baseline to Year 6, the Corridor has seen a 4 percent net loss of establishments.
- In Year 6, establishments with fewer than 5 employees continued to see the largest net declines of all size categories; the number of small establishments now has fallen by nine percent since baseline. However, establishments with fewer than 5 employees have declined by four percent region-wide over the same time period, suggesting that challenges facing very small businesses are not specific to the Corridor.
- After a one-year loss of 24 businesses between Year 5 to Year 6 the category of business with 5 to 19 employees is slightly below Baseline.
- The Corridor continues to see a net increase in the number of establishments with 20 to 99 employees, with many of these gains in Downtown Minneapolis. These mid-size businesses make up 18 percent of establishments on the Corridor, a share that has increased since Baseline.

By Segment:

- In Year 6, all but one Corridor segment experienced losses in establishments with fewer than 5 jobs. The exception was Midway Central, which saw an increase in three establishments in this category. Small business declines have been particularly large in the Downtown segments, with Downtown Minneapolis losing 11 percent of businesses with 5 or fewer jobs, and Downtown St. Paul losing 19 percent from Baseline.
- The UMN/Environs segment, which had seen relatively consistent business growth 2009 to 2013, now posts a net loss since Baseline. This is primarily due to a net loss of 13 establishments with fewer than 20 employees.

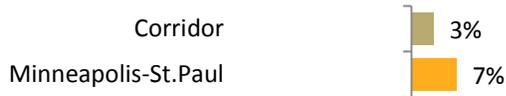
Outcome: Number of jobs on the Corridor is growing

Indicator: Percent change in number of jobs

Key Question: Are employment opportunities along the Corridor growing?

Percent change in jobs

Baseline to Year 6

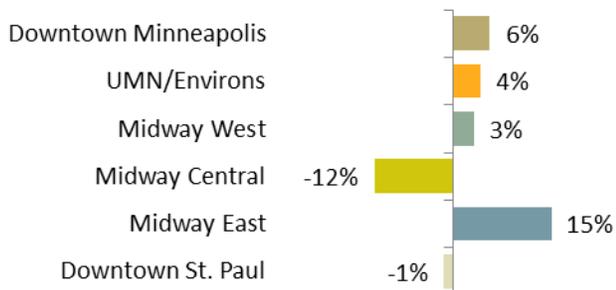


Source: Employment data from Minnesota Department of Employment and Economic Development's Quarterly Census of Employment and Wages data as geocoded and compiled by the Metropolitan Council, 2009-2014. Previous years of data are back-revised to account for improved locating of establishments.

* See Appendix for additional data, including number of jobs

Percent change in jobs

Baseline to Year 6



Note:

These figures include jobs located in both Downtown Minneapolis and Downtown St. Paul, as well as job changes as far north as Pierce Butler Route and as far south as Selby Avenue.

Overall Corridor:

- From Baseline to Year 6, the Corridor has seen a 3 percent net gain in jobs, compared to a net gain of 7 percent in Minneapolis-St. Paul.

By Segment:

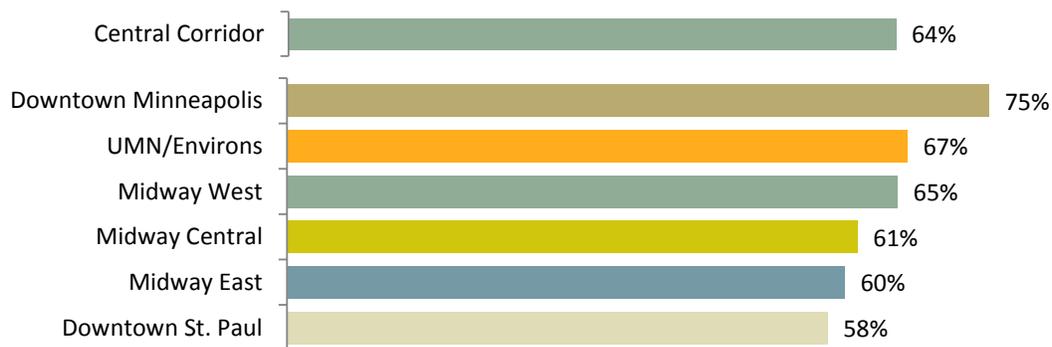
- Since 2009 job growth has been uneven along the Corridor, with strong growth in Downtown Minneapolis (6 percent) and Midway East (15 percent); Midway Central and Downtown St. Paul have seen losses (12 percent and 1 percent, respectively). In the case of Midway Central, these losses primarily took place prior to the opening of the Green Line; the segment lost 800 jobs between 2009 and 2010 alone. Since 2012 the segment has added 300 jobs.

Outcome: Many residents living and working in the Corridor

Indicator: Percentage of low- and moderate-income Corridor residents who work within a commute-shed reachable within 45 minutes by public transit*

Key Question: Does the Corridor light rail provide access to employment for low- and moderate-income residents?

Share of employed low- and moderate-income residents who work in a 45 minute transit commute-shed, by segment
Central Corridor, Year 6



Source: Employment data from Longitudinal Employer-Household Dynamics, U.S. Census Bureau, 2014. Commute-sheds prepared by Chen-Fu Liao, University of Minnesota’s Center for Transportation Studies.

Note: Commute-sheds reflect train and bus schedules and were revised in 2015 to reflect changes to planned bus schedules approved in 2014. Baseline through Year 5 measures were recalculated using the revised commute-sheds.

* “Low- and moderate-income” is defined as workers earning less than \$3,333 per month in 2010 dollars (gross income of approximately \$40,000 annually).

Note:

Changes in this metric owe both to changes in transit schedules as well as changing resident-workplace location patterns; even if transit service improves, the share of residents working within a 45 minute commute shed might not rise, since relationships between the locations of residents’ workplaces and homes are not held constant (e.g., workplaces could relocate, new residents could move in, existing residents could leave, etc.).

Overall Corridor:

- In the Corridor, almost two out of three low- to moderate-income employed residents work within the transit commute-shed (64%). That means that of the 19,000 residents who are employed and earn less than \$3,333 per month, about 12,000 could arrive at their current job within 45 minutes using transit.
- The addition of the Green Line, associated bus route improvements and more frequent transit service has improved access to the share of low- to moderate-income employed residents who work within a 45 minute transit commute shed by approximately 5 percent over baseline.

By Segment:

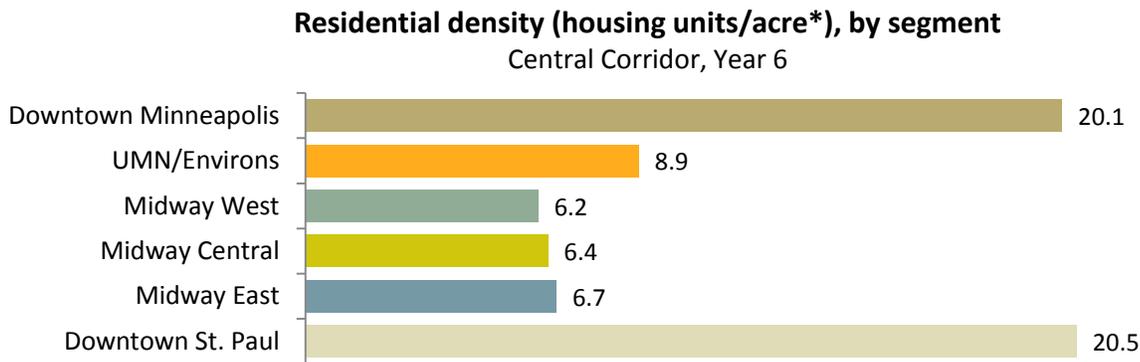
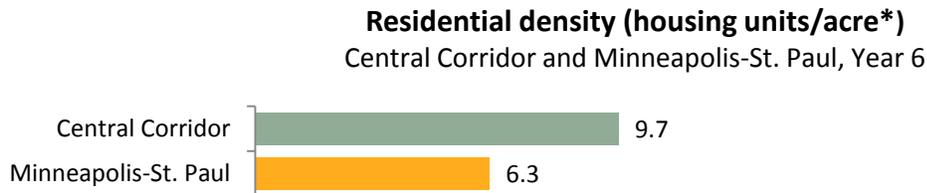
- The train's operation has eased accessibility to jobs for low- to moderate-income workers in all segments except for Downtown St. Paul, which saw a 1-percent decrease in the share of low- to moderate-income residents working within a 45 minute commute shed. All other segments experienced gains this metric, ranging from 3 to 7 percent.
- Residents in the Downtown Minneapolis segment (75%) are the most likely to have access to their job within a 45 minute commute shed, growing by 5 percent over baseline.
- Residents in the Downtown St. Paul are the least likely to have access to their job within the 45 minute transit commute-shed – 58 percent of employed low- to moderate-income residents in this segment are able to reach their current place of work within 45 minutes.

Vibrant, transit-oriented places

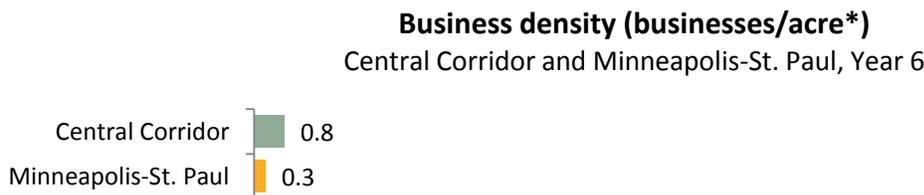
Outcome: Increase in housing units and business addresses (density)

Indicator: Housing units per acre*

Key Question: Are Central Corridor neighborhoods becoming more transit-oriented?



Source: U.S. Census Bureau, 2010 Housing Unit counts provides the baseline figure for housing units. Additional housing units for Years 2-6 figures are based on Metropolitan Council's Residential Permit Survey, 2010-2014. Each year of permit data represents units added in that year – for example, 2014 (Year 6) Residential Permit Survey data provides units added in 2014.



*Calculated using blocks with housing units.

* Employment site by acre as calculated using land acres of census tracts.

Source: Metropolitan Council, Minnesota Department of Employment and Economic Development (DEED).

Housing density, Year 6	Net residential units added since Baseline	Total housing units	Land Acres	Housing Units/Acre
Downtown Minneapolis	2,099	13,029	649	20.1
UMN/ Environs	1,556	7,821	884	8.9
Midway West	178	5,421	877	6.2
Midway Central	(5)	5,066	786	6.4
Midway East	46	9,264	1,390	6.7
Downtown St. Paul	571	6,725	329	20.5
Central Corridor (total)	4,757	47,638	4,914	9.7
Cities of Minneapolis & St. Paul	12,775	311,857	49,844	6.3

Density refers to housing units per land acre. To calculate density, only blocks with at least one housing unit were used.

Source: U.S. Census Bureau, Census 2010. Census 2010 Housing Unit counts provide the baseline figure for housing units. Additional housing units since baseline are based on Metropolitan Council's Residential Permit Survey. It is possible that some of the residential permits were issued before the April 2010 Census.

Overall Corridor:

- From Baseline to Year 6, 4,757 residential units have been added to the Corridor, driving an increase in residential density from 8.9 to 9.7 units per acre. This is a measurable increase in density within a large geographic area. The Corridor is 55 percent more dense than the cities of Minneapolis and St. Paul combined.
- Nearly 90 percent of all residential units added since Baseline were added in Years 4, 5, and 6.
- The cities of Minneapolis and St. Paul have added more than 12,700 units since the Baseline measurement; similar to the corridor, over 85 percent of these were added in Years 4, 5, and 6. This net gain in residential units has similarly resulted in measurable increases in density for the two cities.
- The density of businesses remains higher along the Corridor than the cities of Minneapolis and St. Paul as a whole. However, declines in total number of businesses have led to net density loss from Baseline, falling from 0.9 businesses per acre to 0.8. (For additional details, see appendix A22.)

By Segment:

- The two downtowns are the densest residential segments, and have made notable increases in housing density since the Baseline. Year 6 residential density reflects an additional 2 units per acre in both Downtown Minneapolis and Downtown St. Paul.
- Increases in residential units in the Downtown segments account for 56 percent of all Corridor growth (44% from Downtown Minneapolis, 12% from Downtown St. Paul).
- The University area is seeing the fastest increase in residential units with over a 25 percent increase since Baseline.
- The Midway segments have seen the least development; in fact, due to residential demolitions, Midway Central has seen a small net loss of units.

- Business density in the Corridor is, highest in the two downtown areas, with Midway West the next most-dense area. None of the segments experienced a measureable gain in business density from 2009 to 2014; net losses of businesses in the Downtown segments led to slight decreases in business density during that time, while business density held relatively stable for the other four segments.

Outcome: Strong rail ridership
Indicator: Average weekday and monthly rail ridership
Key Question: Are Central Corridor neighborhoods becoming more transit-oriented?

	Average Weekday Ridership	Average Monthly Ridership*	Total rides
Green Line ridership (January 15 – December 15)	37,400	1,031,931	12,383,173
Projected Green Line ridership	2015: 27,529 2030: 40,936	--	--
<i>Comparison: Blue Line ridership (January – December 2015)</i>	31,471	885,023	10,620,284

*January through December 2015

Source: Metro Transit.

Overall Corridor:

- Since opening in mid-June 2014, the Green Line’s ridership greatly exceeded Metro Transit’s expectations. In its first full year of operation, the line’s average weekday ridership of 37,400 was approximately 35 percent higher than Metro Transit's 2015 weekday projection.
- To reach Metro Transit’s 2030 projection, ridership levels need to grow by roughly 235 weekday riders per year for the next fifteen years.
- At the beginning of 2015 ridership was roughly 800,000/month; this gradually picked up through spring and summer 2015 until peaking at 1,274,199 in October, after which ridership tapered off roughly 100,000 for each of the final two months of 2015.

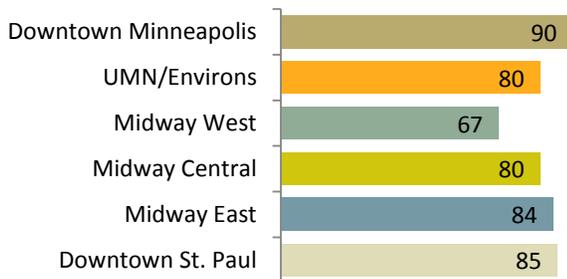
Outcome: Walk friendly

Indicator: Average Walk Score® in the Central Corridor*

Key Question: Are Central Corridor neighborhoods becoming more transit-oriented?

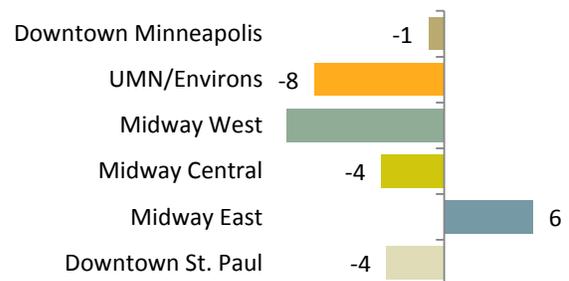
**Average Walk Score,®
by segment**

Central Corridor, Year 6

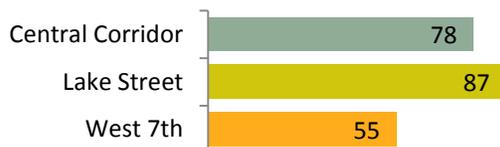


**Change in average Walk Score,®
by segment**

Central Corridor, Baseline to Year 6



**Average Walk Score®
Comparison Corridors, Year 6**



Source: www.WalkScore.com, October 2010- March 2016

*Based upon approximate ½ mile intervals throughout each corridor, primarily at stations or major intersections, but excluding downtown areas.

The Walk Score® is a nationally comparable measurement of walkability at the local level, with scores ranging from 0 (not walkable) to 100 (extremely walkable). The methodology is proprietary, but relies on an analysis of walking routes to nearby amenities. Walk Score® assigns amenities within a quarter mile of a given location the highest possible number of points, and allocates fewer points to more distant amenities. Data inputs include “Google, Education.com, Open Street Map, the U.S. Census, Localeze, and places added by the Walk Score user community.”¹ Therefore, the scores are subject to limitations and changes in those data sources. Additionally, Walk Score® measures the proximity to amenities around a given point, but does not measure things like construction impacts or closed sidewalks.

Within the Central Corridor:

- The Central Corridor’s average Walk Score is 78, a net four point decline since the Baseline report, but still considered “very walkable” post-rail opening.
- Changes in the Walk Score® could be a result of a change in amenities across the Corridor or changes in the way Walk Score® or its data sources classifies a particular establishment.

¹ <https://www.walkscore.com/methodology.shtml> (accessed May 29, 2015).

- As of Year 6, Downtown Minneapolis has continues to have “Walker’s Paradise” status (90-100 points) after regaining it in year 5. Downtown Minneapolis had fallen below a Walk Score of 90 for the three preceding years. “Walker’s Paradise” is Walk Score’s® highest rank, indicating that “daily errands do not require a car.”
- One segment, Midway West, has fallen into the “somewhat walkable” category (50-69 points) this year.
- The remaining four segments score as “very walkable” (70-90 points), where “most errands can be accomplished on foot.”
- Five of the six segments have seen declines in walkability as measured by the Walk Score®, the largest of which was in Midway West, where the Walk Score has fluctuated between 67 and 81 points, ultimately losing 12 points from Baseline to Year 6. Although still “very walkable,” UMN/Environs also experienced a large decline in Walk Score®, falling from a score of 89 at baseline to 80 in Year 6.

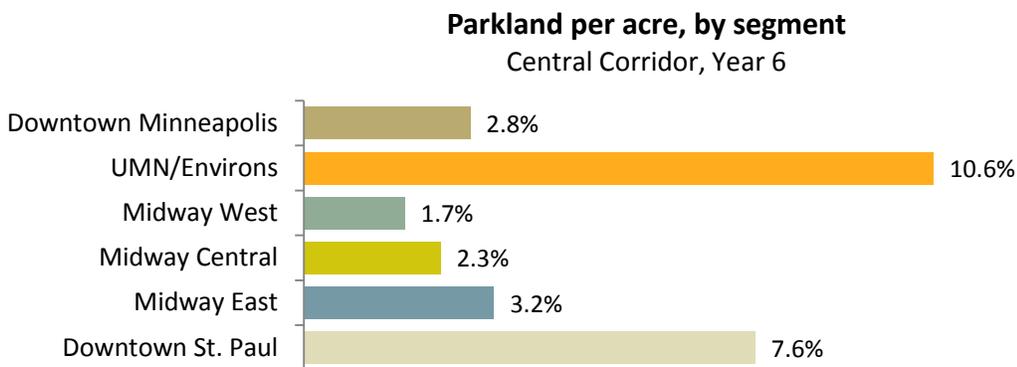
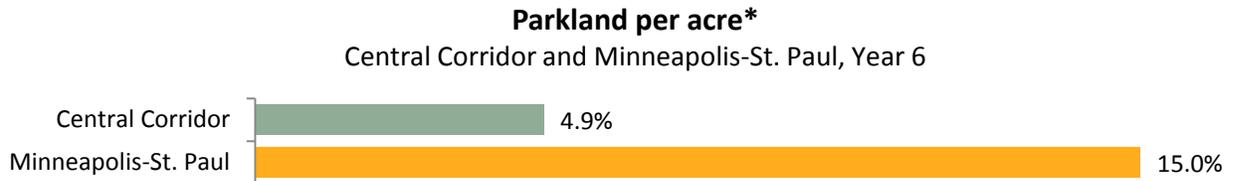
Comparison to other corridors:

- The Central Corridor is slightly less walkable than Minneapolis’ Lake Street Corridor, but continues to be far more walkable than St. Paul’s West 7th Corridor.
- The Central Corridor and the West 7th Corridor have seen comparable declines in walkability since Baseline (5 to 6 points). By contrast, the Lake Street Corridor Walk Score® in Year 6 is quite similar to Baseline.

Outcome: Access to parks and commons

Indicator: Prevalence of Corridor parks and commons

Key Question: Do Central Corridor neighborhood residents and visitors have access to parks and commons?



	Parkland Density (parks/acre)	Parkland Acres per 1,000 households	Number of Parks and POPS*
Central Corridor 2014 (Parks Baseline)	4.7%	10.0	57 parks/ 12 POPS
Central Corridor 2015	4.9%	10.0	58 parks/ 13 POPS
Central Corridor 10-year goal	5.4%	11.5**	2 parks or POPS/annually
Minneapolis benchmark	14.9%	--	--
St. Paul benchmark	15.2%	--	--

* POPS are privately owned public spaces.

** Assuming no growth in households; the goal is 7.1 acres per 1,000 households when factoring in a projected growth of 17,000 households in the corridor. Minneapolis and St. Paul density benchmarks reflect 2013 data.

Source: Trust for Public Land; Greening the Green Line Report, 2015.

Note:

Over the past two years, the Green Line Parks and Commons workgroup, a cross-sector collaborative hosted by the City of Minneapolis, City of St. Paul, and The Trust for Public Land, and funded by the Central Corridor Funders Collaborative, outlined the opportunity to create a Green Line “parks and open space system” geared towards improving access to new parks and open spaces along the corridor. In their 2014 “Greening the Green Line” report, the workgroup argues that green space contributes to an area’s sense of place, and impacts quality of life as well as the overall level of community investment by both residents and businesses.

The Trust for Public Land provided three metrics adapted from the workgroup’s report to be incorporated into the Key Outcomes Report starting in Year 5. These indicators are used to gauge the current amount of parkland along the Corridor and provide goals for future levels, based in part on projected population growth. The focus area comprises up to a half-mile buffer around the Green Line.

Outside of Minneapolis and St. Paul, no other city is known to have developed goals or metrics for the amount of parkland in transit corridors. The workgroup’s report does note that while open space is plentiful across the broader Minneapolis-St. Paul metropolitan area, it is not distributed equitably throughout the region. Neighborhoods along the Corridor have far less parkland than the region as a whole.

The Green Line Parks & Commons work group has set goals of increasing parkland to 5.4 percent of the corridor’s land area over the next 10 years, or reaching 11.5 acres of parkland for every 1,000 residents currently living in the corridor. These goals are based on full development of planned and potential parks within the Corridor.

Overall Corridor:

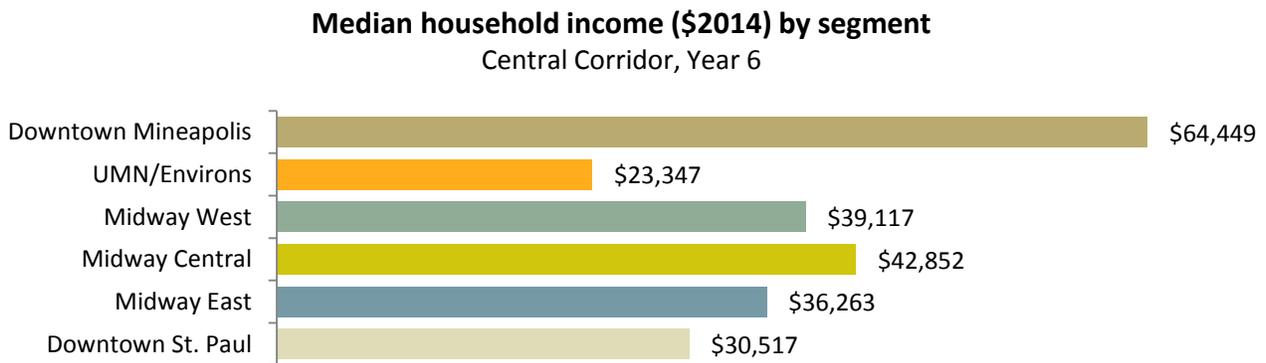
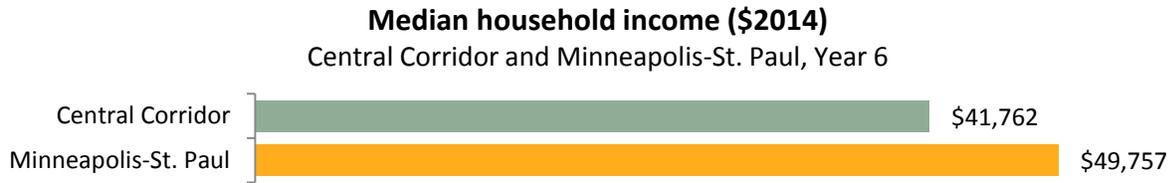
- In 2015, just 4.9 percent of the Corridor’s total acreage was dedicated to parks and commons. This is an increase of 0.2 percentage points over Year 5, but is still less than a third of the comparable share for the cities of Minneapolis and St. Paul as a whole.
- As of Year 6, there are 10 acres of parkland per 1,000 households along the Corridor – this figure remains unchanged from Year 5.
- In addition to measuring acreage, the workgroup also tracks the number of parks and privately-owned public spaces (POPS) on an annual basis. The 2015 count tallied 58 parks and 13 POPS along the corridor, representing an increase of 1 park and 1 pop over last year.

By Segment:

- The percentage of parkland is lowest in the Midway segments (2 to 3 percent of total land area) and highest in the University and Environs (nearly 11 percent) and Downtown St. Paul (8 percent).

Demographic context

Context Measure: **Median household income**



Source: U.S. Census Bureau, American Community Survey 2010-2014 5-year estimates.

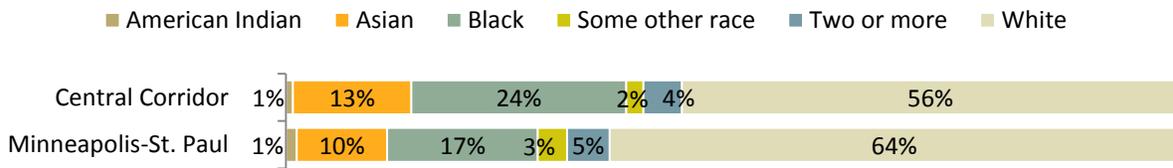
Findings:

- Median household income in the Central Corridor is nearly \$8,000 lower than that of the cities of Minneapolis and St. Paul as a whole.
- According to Census Bureau data, income levels for both the Corridor and the two cities have not changed significantly from Baseline.
- Of all segments, Downtown Minneapolis has the highest median income (\$64,449). Downtown St. Paul’s median income is significantly less (\$30,517).
- UMN/Environs, which has a high concentration of students, has the lowest median household income (\$23,347). The next lowest is Midway East, with a median household income of \$36,263.
- Looking at several of the available data points, we can see relationships with income characteristics in other indicators. For example, while the UMN/Environs segment has the lowest income, they also spend the smallest share of their income on both housing and transportation (46%).

Context Measure: Population and race/ethnicity

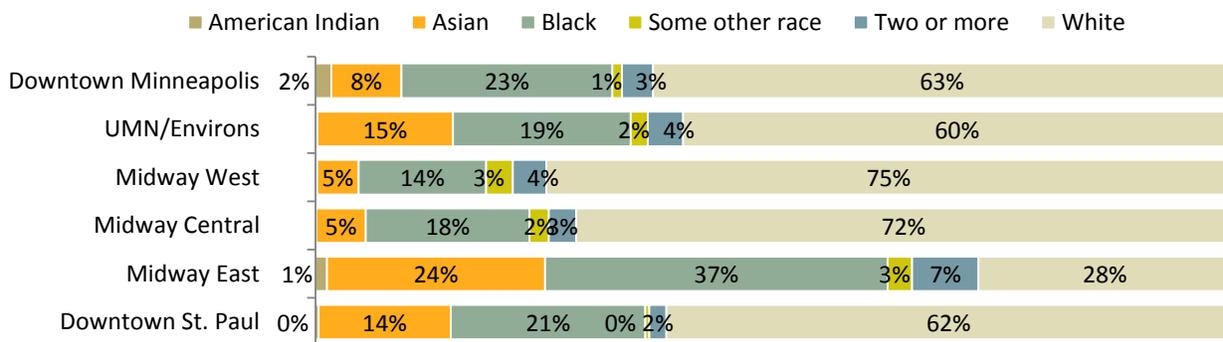
Central Corridor residents by race

Minneapolis-St. Paul and Central Corridor, Year 6



Central Corridor residents by race, by segment

Central Corridor, Year 6



Source: U.S. Census Bureau, American Community Survey, 2010-14.

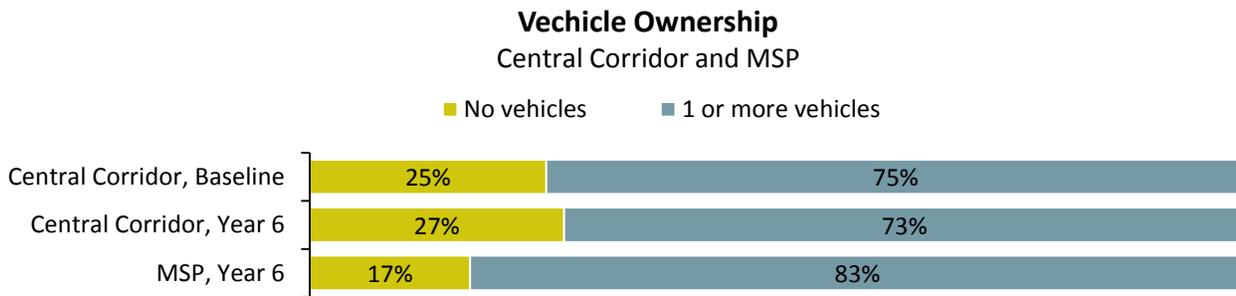
Note: Racial categories shown include residents of Hispanic ethnicity. See Findings below for the share of population that is Hispanic.

Findings:

- Total population along the Central Corridor has grown by 13% between 2010 and 2014, from 94,611 as of the 2010 Census to 107,628 as of 2014 Metropolitan Council estimates.
- Overall, the Corridor is more racially diverse than the cities of Minneapolis and St. Paul as a whole, driven by larger populations of black and Asian residents.
- Since the Baseline report, the Corridor has seen a statistically significant increase in population overall. There have also been statistically significant increases in the numbers of Asian and black or African-American residents. Asian populations grew by 3,500 residents since Baseline, and black or African-American populations grew by 4,000 residents since Baseline. Changes in other racial and ethnic groups since Baseline have not been statistically significant.
- Growth in black or African-American populations has been largest in Midway East (increase of 1,200 residents since Baseline), Downtown Minneapolis (increase of 1,100 residents), and Midway West (increase of 1,000 residents).
- Growth in Asian populations has been largest in Midway East (increase of 1,400 residents), UMN/Environs (increase of 900 residents), and Downtown St. Paul (increase of 500 residents).
- In every segment except Midway East, the majority of residents are white non-Hispanic. In Midway East, residents of color make up three-quarters of population.

- Corridor-wide, Hispanic or Latino residents make up just 5 percent of residents. Hispanics or Latinos make up 10 percent of the cities of Minneapolis and St. Paul as a whole.
- By segment, 7 percent of residents in the Midway East and Central segments are Hispanic or Latino, while Hispanic or Latino residents represent less than 5 percent of residents in the remaining four segments.

Context Measure: Vehicle Ownership

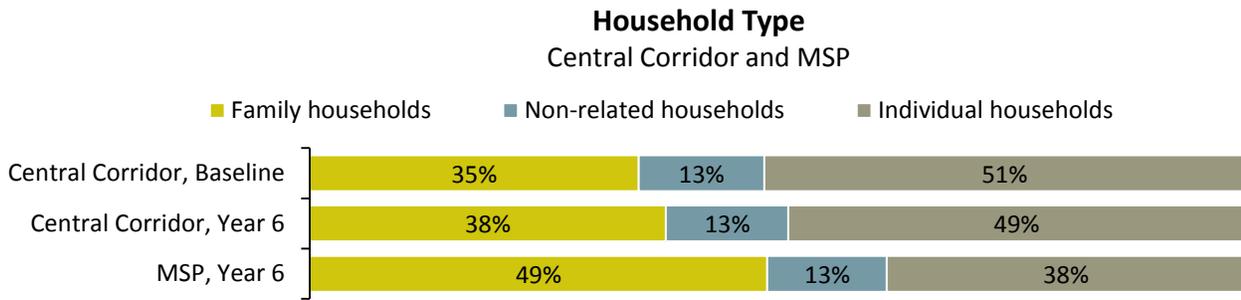


Source: U.S. Census Bureau, American Community Survey, 2005-2009 (Baseline) & 2010-14 (Year 6).

Findings:

- Since Baseline vehicle ownership along the Central Corridor has remained constant.
- Relative to Minneapolis-St. Paul, the Central Corridor has a larger proportion of households with no vehicles available, indicating that the Corridor is indeed more transit-dependent than the two cities combined.

Context Measure: Household Type



Source: U.S. Census Bureau, American Community Survey, 2005-2009 (Baseline) & 2010-14 (Year 6).

Findings:

- Since Baseline household types along the Central Corridor have remained essentially constant
- Relative to Minneapolis-St. Paul, the Central Corridor has a smaller proportion of family households and a larger proportion of individual households – the gap for both household types is 11 percentage points.

Data notes

American Community Survey Data: The U.S. Census Bureau's American Community Survey (ACS) is the source of several indicators used in this report. The ACS program publishes 1-, 3-, and 5-year estimates (although it ceased publication of 3-year estimates after the 2011-2013 sample). This report relies exclusively on 5-year estimates, since they are the only estimates available for areas with fewer than 20,000 residents. To date, the Census Bureau has made six sets of 5-year estimates available: 2005-09, 2006-2010, 2007-11, 2008-12, 2009-13, and 2010-2014.

The ACS program does not collect data from every resident; instead the data are collected through a sample survey. Thus, there is a margin of error associated with each point estimate reported in the survey. The ACS publishes margins of error with a 90 percent confidence interval, or range in which the true value is likely to fall if data were collected from the entire population group in question. For example, if the ACS estimates that 49 percent of the residents in a certain area are female, and reports a margin of error of +/-7 percentage points, one can be 90 percent confident that the actual population percentage lies between 42 and 56 percent. This means that in many instances where point estimates appear to differ, the differences between the two estimates are not statistically significant.

Year 6 represents the first year when two non-overlapping 5-year ACS samples are available (2005-2009 and 2010-2014). As such any changes are now more likely to be statistically significant than in previous years of the report, although large margins of error at the geographic level of analysis still mean that data are unlikely to show statistically significant differences. While it may be difficult to draw year-to-year changes from these numbers, the ACS can be a valuable means of tracking changes that occur along the Corridor over the next several years.

Indicators sourced from ACS are: household income, median household income, total population, and foreign born as a percent of total population. Please contact Wilder Research directly for more information on the margins of error associated with indicators in this report.

Housing + Transportation index: Due to methodological improvements made by the Center for Neighborhood Technology (CNT) to the H+T Index over time, readers cannot make year-to-year comparisons across past years' Tracker and Key Outcome reports. Numbers in this report reflect a backcasted dataset created by CNT specifically to compare the baseline metric and current version of H+T Index. This dataset is also different from that which is on the H+T website. Please contact Wilder Research with additional questions regarding H+T index.

Minnesota Department of Employment and Economic Development's summarized file of the Quarterly Census of Employment and Wages (QCEW): This dataset is a summary of second-quarter employment data by 2014 Census Geography from DEED Quarterly Census of Employment and Wages (QCEW) Employment Data. DEED compiles quarterly counts of employees, employer reporting establishments, and aggregate wages, covered by Unemployment Insurance in Minnesota, as part of a uniform nationwide reporting effort administered in partnership with the U.S. Bureau of Labor Statistics (BLS). DEED publishes data by North American Industry Classification System (NAICS) codes and by 'ownership' (total government, federal government, state government, local government, private). The

original raw data are restricted. Summary data are only available for those geographies where at least three employers exist and no one employer represents 80 percent or more of the total employment.

Data for business establishments with more than 999 employees are not available at the segment scale. Business establishments with “Fewer than 5” employees could technically have less than one employee (one part-time employee, for example). Data from 2009, 2010, 2011, 2012, and 2013 were corrected by DEED and back-revised with improved geo-coding accuracy, more accurate Department of Education data, and additional locating of smaller businesses in Minneapolis and St. Paul. The data in this report reflect the reissued back-data and reflect over 99.8% of all employment in Minneapolis and St. Paul in 2014 (Year 6).

Walk Score®: Walk Score® is a measure of walkability for a single address that uses multiple data sources (such as Google maps) in order to determine access to amenities within a walkable distance (.25-1 mile). For more information, go to www.walkscore.com/methodology.shtml.

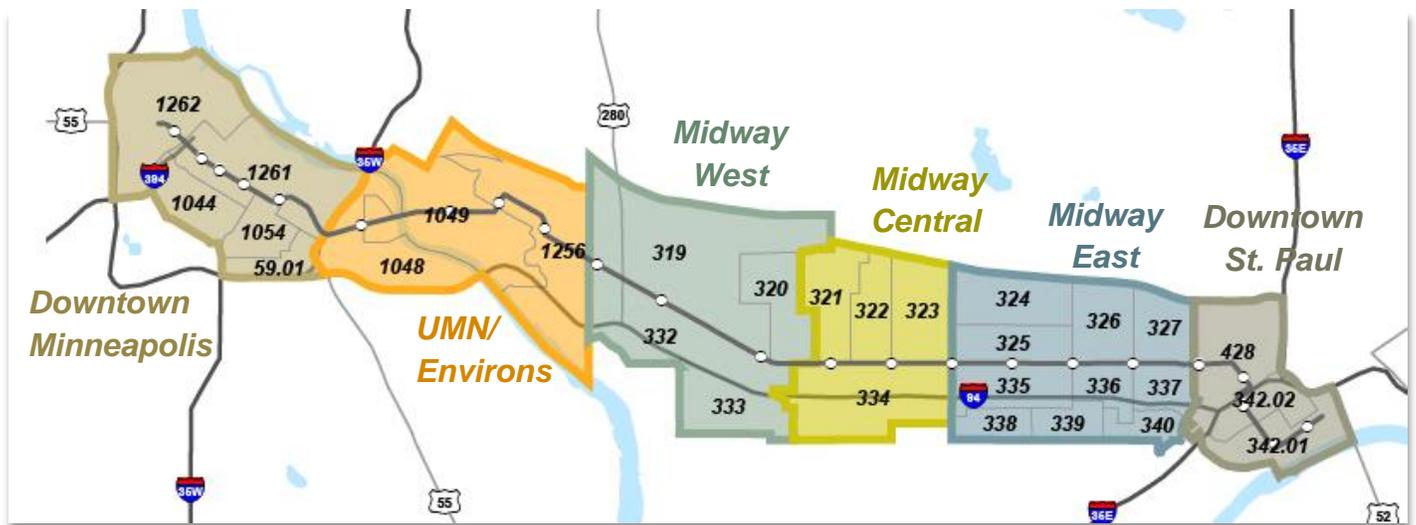
Commute-shed: Commute-sheds have been updated to reflect bus route changes approved by the Metropolitan Council in 2014.

Data timeline:

Indicator number	Measure	Baseline	Year 2	Year 3	Year 4	Year 5	Year 6	Source
1	Household Income	2005-09	2006-10	2007-11	2008-12	2009-13	2010-14	American Community Survey
2	Affordable Units	2011	N/A	N/A	N/A	N/A	2015	City of Minneapolis, City of St. Paul
3	Homeownership stabilization	2011	N/A	N/A	N/A	N/A	2015	Various, see indicator
4	Median estimated single family home market value	2011	N/A	N/A	N/A	N/A	2015	Hennepin and Ramsey County Assessors
5	Median rent	2011	N/A	N/A	N/A	N/A	2015	HousingLink
6	H+T index	2000	2005-09	2005-09	2005-09	2009-13	2009-13	Center for Neighborhood Technologies
7	Tenure	2005-09	N/A	N/A	N/A	N/A	2010-14	American Community Survey
8	Mobility	2005-09	N/A	N/A	N/A	N/A	2010-14	American Community Survey
9	Cost-burdened housing	2006-10	N/A	N/A	N/A	N/A	2010-14	American Community Survey
10	Business establishments & jobs (size/type/density)	2009	2010	2011	2012	2013	2014	MN DEED Via Metropolitan Council
11a.	Commute-shed for employed residents in commute-shed	Projected 2014	same	same	same	2014 (actual)	2014 (actual)	University of Minnesota
11b.	Residents for employed residents in commute-shed	2011	2011	2011	2011	2011	2014	Longitudinal Employer-Household Dynamics – U.S. Census Bureau
12	Business establishments	2009	2010	2011	2012	2013	2014	MN DEED, Via Metropolitan Council
13	Residential units	2010 (Census)	2010	2011	2012	2013	2014	Metropolitan Council, Residential Permit Survey
14	Ridership	N/A	N/A	N/A	N/A	N/A	2015	MetroTransit
15	Walk Score ®	October 2010	October 2011	October 2012	October 2013	March 2015	March 2016	www.walkscore.com
16	Parks and POPS	2014	N/A	N/A	N/A	N/A	2015	Trust for Public Land
17	Median income	2005-09	2006-10	2007-11	2008-12	2009-13	2010-2014	American Community Survey
18 -21	Race, ethnicity, population, household type, vehicle ownership	2005-09	2006-10	2007-11	2008-12	2009-13	2010-2014	American Community Survey

Appendix

CENTRAL CORRIDOR CENSUS TRACTS (2010)



Access to affordable housing

A1. Share of households by income (in 2014 dollars)

Central Corridor and Minneapolis-St. Paul, Year 6

	Central Corridor	Minneapolis-St. Paul
Less than \$10,000	18%	11%
\$10,000-\$29,999	26%	22%
\$30,000-\$49,999	17%	18%
\$50,000-\$99,999	23%	28%
\$100,000+	16%	21%
Total number of households	39,660	279,231

Source: U.S. Census Bureau American Community Survey, 2010-14

A2. Household income (in 2014 dollars), by segment

Central Corridor, Year 6

	Downtown Minneapolis	UMN/ Environs	Midway West	Midway Central	Midway East	Downtown St. Paul
Less than \$10,000	16%	30%	11%	12%	17%	22%
\$10,000-\$29,999	18%	31%	25%	31%	29%	29%
\$30,000-\$49,999	12%	18%	23%	14%	19%	18%
\$50,000-\$99,999	23%	12%	26%	28%	25%	23%
\$100,000+	31%	10%	15%	15%	11%	9%
Total number of households	10,014	5,931	5,139	4,848	8,366	5,662

Source: U.S. Census Bureau American Community Survey, 2010-14

A3. Median household income, by segment

Central Corridor and Minneapolis-St. Paul, Year 6

	Downtown Minneapolis	UMN/ Environs	Midway West	Midway Central	Midway East	Downtown St. Paul	Central Corridor	Minneapolis -St. Paul
In 2014 dollars	\$64,449	\$23,347	\$39,117	\$42,852	\$36,263	\$30,517	\$41,762	\$49,757

Source: U.S. Census Bureau American Community Survey, 2010-14

A4. Housing and transportation costs as a percentage of income for households at 60 percent area median income

Central Corridor and Minneapolis-St. Paul, back revised Baseline and Year 6

	60% of Area Median Income	
	Baseline	Year 6
Downtown Minneapolis	36%	55%
UMN/Environs	44%	46%
Midway West	47%	60%
Midway Central	47%	61%
Midway East	44%	53%
Downtown St. Paul	49%	49%
<hr/>		
Central Corridor	44%	53%
Minneapolis-St. Paul	56%	63%

Source: Housing + Transportation Affordability Index, online at htaindex.cnt.org. Center for Neighborhood Technology, Chicago, IL. (Data available by block group and aggregated to census tracts.)

Notes: Area Median Income relates to the median for the Minneapolis-St. Paul CBSA as per CNT guidance. Results reported in the figure assume an average household size of 2.53 people and 1.24 commuters. Sixty percent of area median income in 2000 Baseline was \$32,582 (2010 dollars) and was \$40,164 for Year 5 (2009-2013 ACS; 2013 dollars). **NOTE:** this data source is unchanged from Year 5 of the Key Outcomes Report.

Strong local economy

A5. Number of businesses, by segment

Central Corridor, 2009-2014

	Businesses					
	2009	2010	2011	2012	2013	2014
Downtown Minneapolis	3,342	3,319	3,343	3,358	3,207	3,274
UMN/Environs	483	485	499	513	466	474
Midway West	912	898	886	901	885	897
Midway Central	449	442	460	465	451	485
Midway East	402	406	410	418	407	420
Downtown St. Paul	1,177	1,144	1,147	1,151	1,092	1,104
Central Corridor	6,765	6,694	6,745	6,806	6,508	6,654
Minneapolis-St. Paul	17,702	17,743	18,001	18,187	17,411	18,119

A6. Share of businesses by industry

Central Corridor, 2009-2014

	NAICS code	Central Corridor	Minneapolis-St. Paul
2009			
Professional and technical services	54	22%	16%
Other services*	81	9%	13%
Health care and social assistance	62	11%	12%
Accommodation and food services	72	9%	9%
Finance and insurance	52	9%	5%
Retail trade	44-45	7%	10%
All other industries**	11, 21, 22, 23, 31-32, 42, 48-49, 51, 53, 55, 56, 61, 71	33%	35%
2010			
Professional and technical services		21%	16%
Other services**		9%	12%
Health care and social assistance		10%	11%
Accommodation and food services		9%	9%
Finance and insurance		9%	6%
Retail trade		7%	10%
All other industries		35%	37%

A6. Share of businesses by industry (continued)

Central Corridor, 2009-2014

	NAICS code*	Central Corridor	Minneapolis- St. Paul
2011			
Professional and technical services	54	22%	16%
Other services*	81	9%	12%
Health care and social assistance	62	10%	11%
Accommodation and food services	72	9%	9%
Finance and insurance	52	9%	6%
Retail trade	44-45	7%	10%
All other industries**	11, 21, 22, 23, 31-32, 42, 48-49, 51, 53, 55, 56, 61, 71	34%	36%
2012			
Professional and technical services		21%	16%
Other services*		9%	12%
Health care and social assistance		10%	11%
Accommodation and food services		9%	9%
Finance and insurance		9%	5%
Retail trade		7%	10%
All other industries**		34%	36%
2013			
Professional and technical services		22%	16%
Other services*		9%	13%
Health care and social assistance		11%	12%
Accommodation and food services		9%	9%
Finance and insurance		9%	5%
Retail trade		7%	10%
All other industries**		34%	36%
2014			
Professional and technical services		22%	16%
Other services*		9%	13%
Health care and social assistance		11%	11%
Accommodation and food services		9%	9%
Finance and insurance		8%	5%
Retail trade		7%	10%
All other industries**		33%	35%

Source: Metropolitan Council summary of MN DEED/QCEW data

*Other services include auto repair, parking garages, beauty salons, grant-making and religious organizations, etc.

**All other industries include: educational services; arts, entertainment and recreation; management; utilities; agriculture; transportation and warehousing; utilities; and mining, oil and gas.

Note: This dataset is a summary of second-quarter, 2014 employment data from DEED Quarterly Census of Employment and Wages (QCEW) Employment Data. DEED compiles quarterly counts of employees, employer reporting establishments, and aggregate wages, covered by Unemployment Insurance in Minnesota, as part of a uniform nationwide reporting effort administered in partnership with the U.S. Bureau of Labor Statistics (BLS). Summary data is only available for those geographies where at least three employers exist and no one employer represents 80 percent or more of the total employment.

A7. Share of businesses by industry, by segment

Central Corridor, 2009-2014

	Dwntwn Mpls	UMN/ Environs	Midway West	Midway Central	Midway East	Dwntwn St. Paul
2009						
Retail trade	6%	9%	7%	18%	13%	4%
Finance and insurance	13%	4%	3%	5%	3%	11%
Professional and technical services	28%	9%	14%	9%	6%	19%
Health care and social assistance	5%	17%	14%	18%	21%	11%
Accommodations and food services	9%	16%	4%	9%	10%	8%
Other services*	6%	12%	11%	12%	15%	11%
All other**	32%	33%	47%	29%	31%	36%
2010						
Retail trade	6%	8%	7%	18%	12%	4%
Finance and insurance	13%	4%	2%	5%	3%	11%
Professional and technical services	29%	10%	14%	10%	6%	19%
Health care and social assistance	5%	17%	14%	18%	23%	11%
Accommodations and food services	9%	16%	4%	8%	9%	8%
Other services*	6%	13%	12%	12%	15%	11%
All other**	32%	33%	47%	30%	32%	36%
2011						
Retail trade	6%	8%	8%	19%	13%	4%
Finance and insurance	13%	4%	1%	5%	3%	11%
Professional and technical services	30%	8%	14%	9%	6%	20%
Health care and social assistance	5%	17%	14%	18%	24%	12%
Accommodations and food services	9%	17%	4%	8%	11%	8%
Other services*	6%	13%	13%	13%	15%	11%
All other**	32%	33%	46%	28%	29%	35%

A7. Share of businesses by industry, by segment (continued)

Central Corridor, 2009-2014

	Dwntwn Mpls	UMN/ Environs	Midway West	Midway Central	Midway East	Dwntwn St. Paul
2012						
Retail trade	6%	8%	7%	19%	11%	4%
Finance and insurance	12%	3%	2%	4%	3%	10%
Professional and technical services	30%	8%	14%	9%	6%	20%
Health care and social assistance	5%	18%	14%	18%	23%	12%
Accommodations and food services	10%	18%	4%	8%	11%	8%
Other services*	6%	13%	12%	12%	14%	10%
All other**	31%	32%	47%	31%	32%	35%
2013						
Retail trade	6%	8%	7%	19%	11%	4%
Finance and insurance	13%	3%	2%	4%	3%	10%
Professional and technical services	31%	8%	13%	9%	6%	20%
Health care and social assistance	5%	19%	15%	18%	22%	12%
Accommodations and food services	9%	17%	4%	8%	11%	8%
Other services*	6%	13%	13%	11%	15%	11%
All other**	30%	32%	47%	31%	32%	36%
2014						
Retail trade	6%	8%	7%	19%	12%	4%
Finance and insurance	12%	3%	1%	4%	4%	9%
Professional and technical services	31%	8%	14%	8%	5%	20%
Health care and social assistance	5%	18%	15%	18%	22%	12%
Accommodations and food services	10%	18%	4%	8%	11%	8%
Other services*	6%	14%	12%	12%	15%	11%
All other**	30%	32%	46%	32%	31%	37%

Source: Metropolitan Council summary of MN DEED/QCEW data

*Other services include auto repair, parking garages, beauty salons, grant-making and religious organizations, etc.

**All other industries include: educational services; arts, entertainment and recreation; management; utilities; agriculture; transportation and warehousing; utilities; and mining, oil and gas.

Note: This dataset is a summary of second-quarter, 2014 employment data from DEED Quarterly Census of Employment and Wages (QCEW) Employment Data. DEED compiles quarterly counts of employees, employer reporting establishments, and aggregate wages, covered by Unemployment Insurance in Minnesota, as part of a uniform nationwide reporting effort administered in partnership with the U.S. Bureau of Labor Statistics (BLS). Summary data is only available for those geographies where at least three employers exist and no one employer represents 80 percent or more of the total employment.

A8. Share of businesses by size

Central Corridor and Minneapolis-St. Paul, 2009-2014

	Central Corridor	Minneapolis-St. Paul
2009	6,765	17,702
Fewer than 5 employees	48%	54%
5 to 19 employees	29%	28%
20 to 99 employees	17%	14%
100 to 249 employees	4%	3%
250+ employees	3%	1%
2010	6,694	17,743
Fewer than 5 employees	48%	54%
5 to 19 employees	29%	28%
20 to 99 employees	17%	14%
100 to 249 employees	4%	3%
250+ employees	2%	1%
2011	6,745	18,001
Fewer than 5 employees	48%	55%
5 to 19 employees	29%	27%
20 to 99 employees	16%	14%
100 to 249 employees	4%	3%
250+ employees	2%	1%
2012	6,806	18,187
Fewer than 5 employees	49%	55%
5 to 19 employees	28%	26%
20 to 99 employees	17%	14%
100 to 249 employees	3%	2%
250+ employees	2%	1%
2013	6,508	17,411
Fewer than 5 employees	46%	52%
5 to 19 employees	30%	28%
20 to 99 employees	18%	16%
100 to 249 employees	4%	3%
250+ employees	2%	2%
2014	6,654	18,119
Fewer than 5 employees	47%	53%
5 to 19 employees	29%	27%
20 to 99 employees	18%	15%
100 to 249 employees	4%	3%
250+ employees	2%	1%

Source: Metropolitan Council summary of MN DEED/QCEW Data

Note: Data for business establishments with more than 999 employees are not available at the segment scale. Business establishments with "Fewer than 5" employees could technically have less than one employee (one part-time employee, for example).

A9. Share of businesses by size, by segment

Central Corridor, 2009-2014

	Dwntwn Mpls	UMN/ Environs	Midway West	Midway Central	Midway East	Dwntwn St. Paul
2009						
Fewer than 5 employees	50%	47%	46%	49%	51%	50%
5 to 19 employees	27%	29%	31%	34%	28%	27%
20 to 99 employees	16%	18%	18%	14%	17%	17%
100 to 249 employees	4%	3%	3%	2%	3%	4%
More than 250	3%	2%	1%	2%	1%	3%
2010						
Fewer than 5 employees	49%	49%	46%	51%	48%	50%
5 to 19 employees	27%	29%	31%	33%	32%	26%
20 to 99 employees	17%	16%	19%	13%	16%	16%
100 to 249 employees	4%	4%	3%	1%	4%	4%
More than 250	3%	2%	1%	1%	1%	3%
2011						
Fewer than 5 employees	49%	47%	48%	52%	52%	51%
5 to 19 employees	27%	31%	31%	34%	28%	25%
20 to 99 employees	16%	16%	17%	12%	16%	17%
100 to 249 employees	4%	3%	3%	2%	3%	4%
More than 250	3%	2%	1%	1%	1%	3%
2012						
Fewer than 5 employees	47%	47%	47%	52%	51%	49%
5 to 19 employees	28%	29%	32%	32%	28%	27%
20 to 99 employees	18%	18%	17%	14%	17%	17%
100 to 249 employees	4%	3%	3%	1%	3%	4%
More than 250	3%	2%	1%	1%	0%	3%
2013						
Fewer than 5 employees	47%	48%	48%	50%	51%	46%
5 to 19 employees	28%	29%	31%	33%	28%	28%
20 to 99 employees	18%	19%	17%	14%	17%	18%
100 to 249 employees	4%	3%	4%	1%	3%	3%
More than 250	3%	2%	1%	1%	1%	4%
2014						
Fewer than 5 employees	46%	45%	47%	50%	49%	44%
5 to 19 employees	28%	47%	31%	32%	30%	29%
20 to 99 employees	18%	28%	17%	15%	17%	19%
100 to 249 employees	4%	19%	4%	2%	4%	5%
More than 250	3%	3%	1%	1%	1%	3%

Source: Metropolitan Council summary of MN DEED/QCEW Data

Note: Data for business establishments with more than 999 employees are not available at the segment scale. Business establishments with "Fewer than 5" employees could technically have less than one employee (one part-time employee, for example).

This dataset is a summary of second-quarter, 2014 employment data from DEED Quarterly Census of Employment and Wages (QCEW) Employment Data. DEED compiles quarterly counts of employees, employer reporting establishments, and aggregate wages, covered by Unemployment Insurance in Minnesota, as part of a uniform nationwide reporting effort administered in partnership with the U.S. Bureau of Labor Statistics (BLS). Summary data is only available for those geographies where at least three employers exist and no one employer represents 80 percent or more of the total employment.

A10. Number of Jobs

Central Corridor, 2009-2014

	Corridor Total	Dwntwn Mpls	UMN/ Environs	Midway West	Midway Central	Midway East	Dwntwn St. Paul	Minneapolis- St. Paul
2009	247,861	127,185	29,714	22,096	9,473	7,744	51,648	447,877
2010	248,306	128,082	29,851	21,585	8,628	8,247	51,914	451,309
2011	249,695	130,890	30,003	20,382	8,347	8,684	51,388	454,453
2012	248,640	132,680	29,708	20,275	8,008	8,533	49,435	459,968
2013	253,626	134,342	30,309	21,861	8,140	8,746	50,227	253,626
2014	256,246	134,337	30,971	22,804	8,333	8,915	50,887	478,804

Source: Metropolitan Council summary of MN DEED/QCEW Data

Note: This dataset is a summary of second-quarter, 2009-2014 employment data from DEED Quarterly Census of Employment and Wages (QCEW) Employment Data. DEED compiles quarterly counts of employees, employer reporting establishments, and aggregate wages, covered by Unemployment Insurance in Minnesota, as part of a uniform nationwide reporting effort administered in partnership with the U.S. Bureau of Labor Statistics (BLS). Summary data is only available for those geographies where at least three employers exist and no one employer represents 80 percent or more of the total employment.

A11. Employed residents working within a 45-minute commute-shed by income group, by segment

Central Corridor, 2014

Employed residents that live in the area	Dwntwn Mpls	UMN/ Environs	Midway West	Midway Central	Midway East	Dwntwn St. Paul	Central Corridor
Low-income workers (less than \$1,250 monthly)	75%	69%	66%	61%	63%	57%	65%
Moderate-income workers (\$1,250-\$3,333 monthly)	75%	65%	65%	61%	58%	59%	63%
High-income workers (More than \$3,333 monthly)	79%	63%	67%	66%	60%	67%	69%
Total employed residents	9,068	4,256	5,041	5,001	9,077	4,159	36,602

Sources: Longitudinal Employer-Household Dynamics, U.S. Census Bureau, 2014; commute-sheds prepared by Chen-Fu Liao, University of Minnesota's Center for Transportation Studies, Winter 2015.

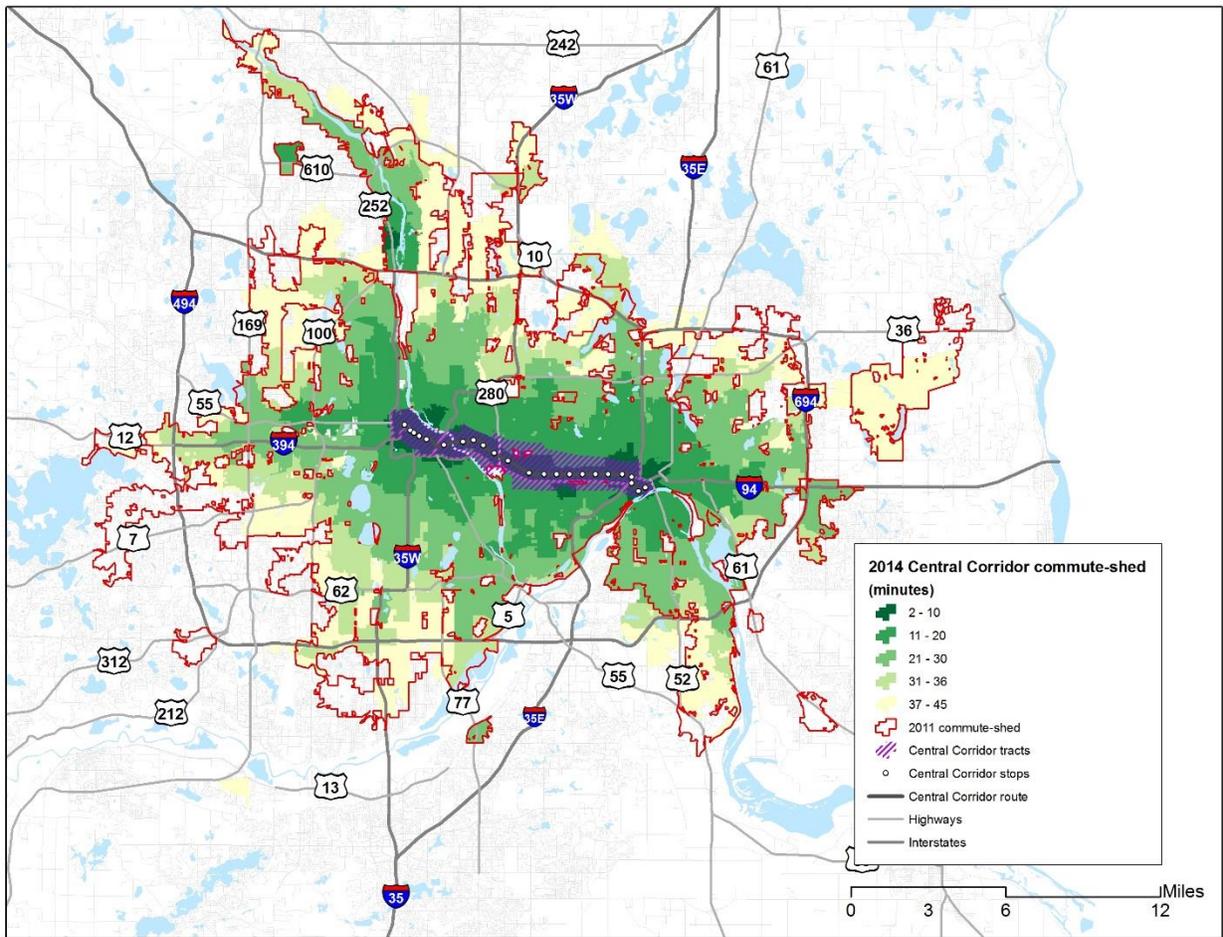
A12. Share of employed low- and moderate-income residents who work within a 45-minute transit commute-shed, by segment

Central Corridor, 2014

	Dwntwn Mpls	UMN/ Environs	Midway West	Midway Central	Midway East	Dwntwn St. Paul	Entire Corridor
Low- and moderate-income workers who live in this area	3,170	2,687	2,605	2,800	6,363	2,114	19,739
Low- and moderate-income workers who live in this area and work in a 45-minute public transit commute-shed	2,385	1,787	1,705	1,712	3,804	1,225	12,618
Share of low-and moderate-income workers who live in this area who work in a 45-minute public transit commute-shed	75%	67%	65%	61%	60%	58%	64%

Sources: Longitudinal Employer-Household Dynamics, U.S. Census Bureau, 2014; commute-sheds prepared by Chen-Fu Liao, University of Minnesota's Center for Transportation Studies, Winter 2015.

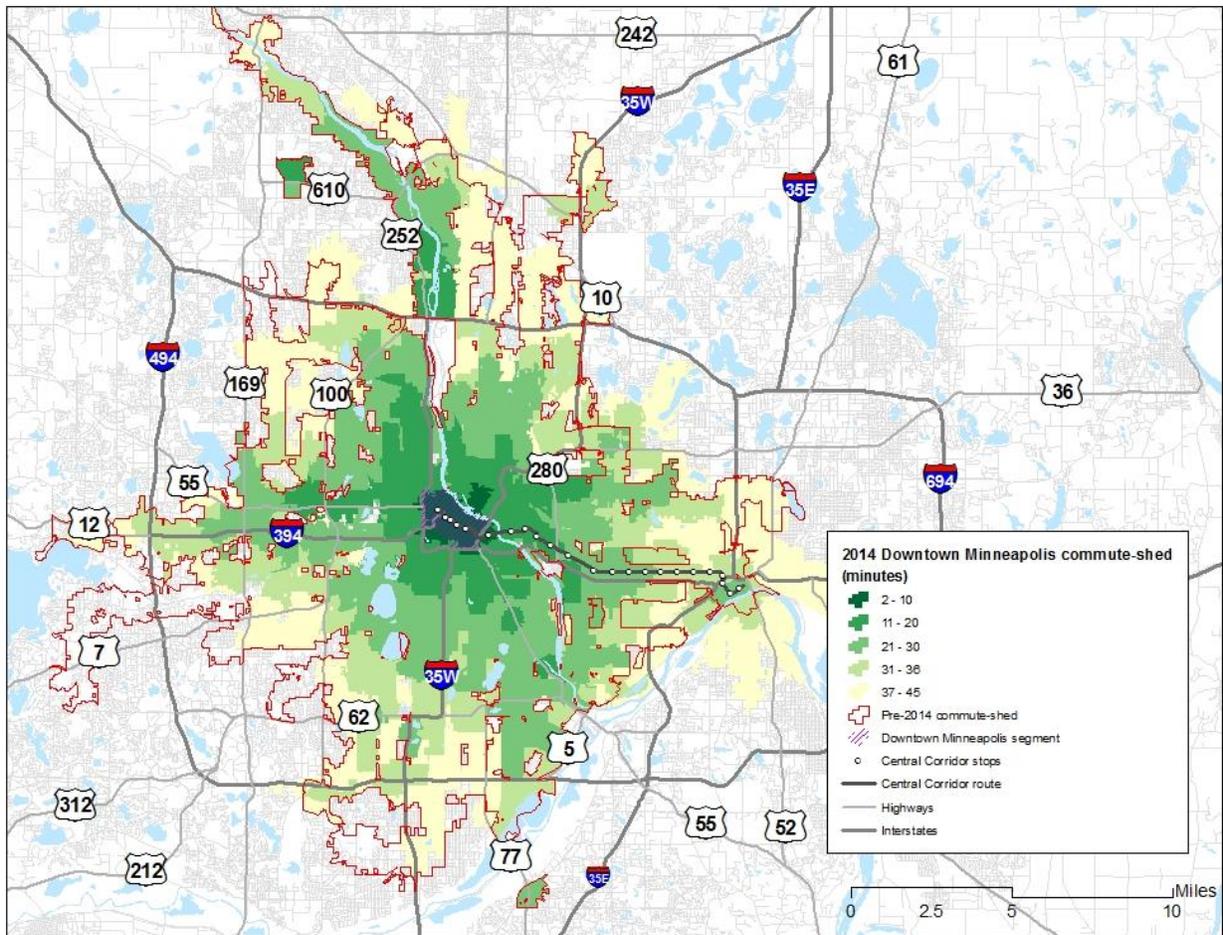
A13. Commute-shed reachable within 45 minutes by transit for residents of the entire Central Corridor
Public transit system in 2014



Sources: Chen-Fu Liao, University of Minnesota's Center for Transportation Studies.

Note: "Reachable by transit" refers to travel permitted by Central Corridor light rail (once operating) and/or up to two transfers by bus.

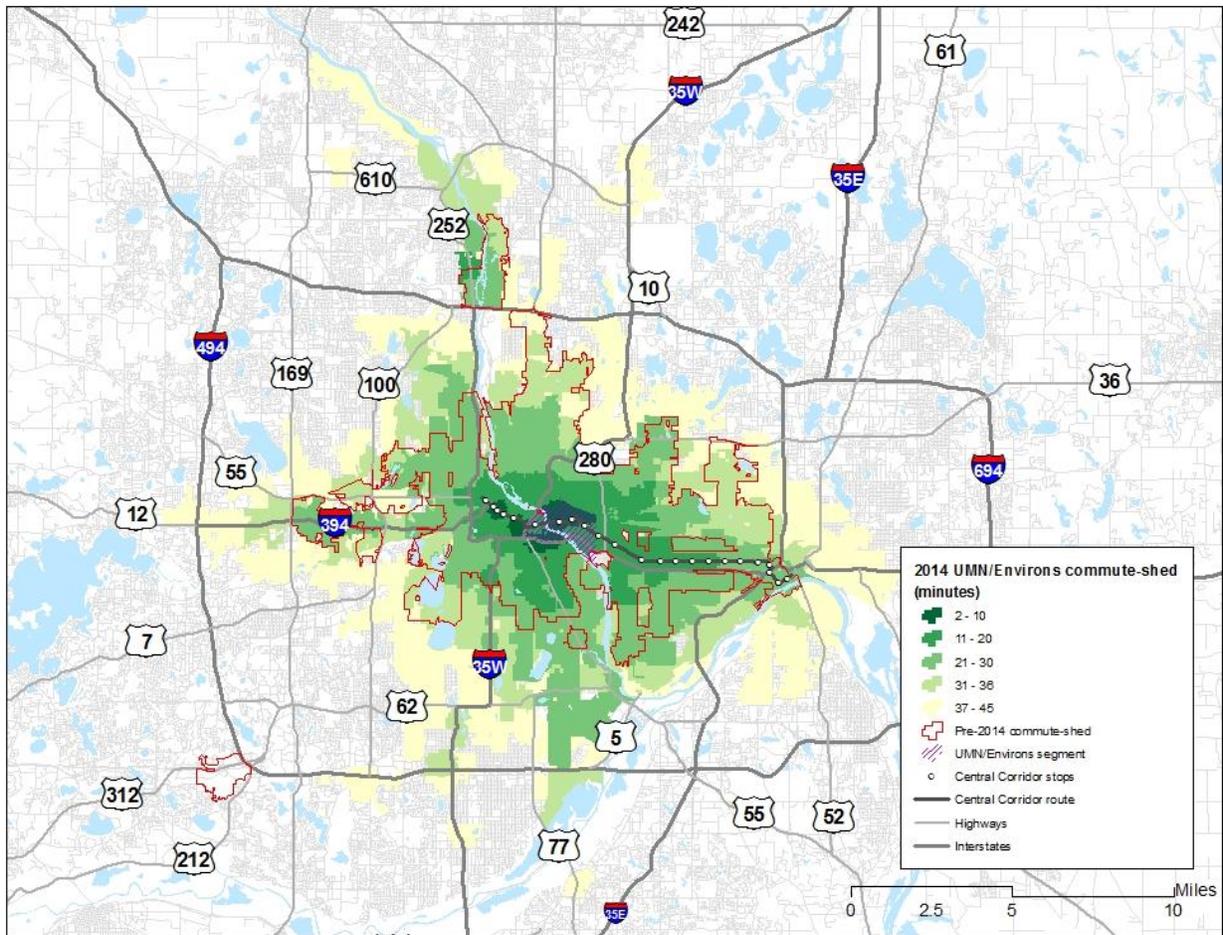
A14. Commute-shed reachable within 45 minutes by transit for residents of the Downtown Minneapolis segment of the Corridor
Public transit system in 2014



Sources: Chen-Fu Liao, University of Minnesota's Center for Transportation Studies.

Note: "Reachable by transit" refers to travel permitted by Central Corridor light rail (once operating) and/or up to two transfers by bus.

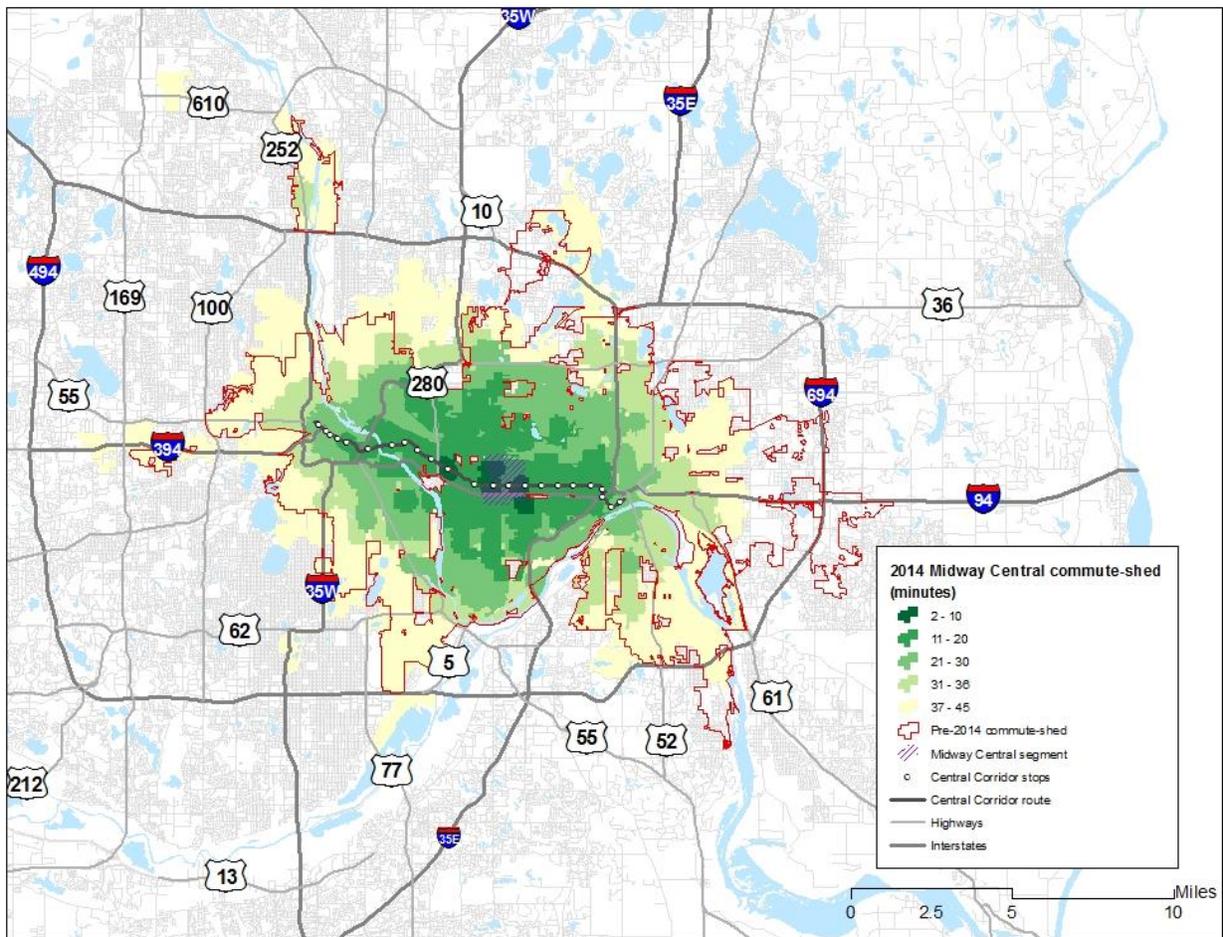
A15. Commute-shed reachable within 45 minutes by transit for residents of the UMN/Environs segment of the Corridor
Public transit system in 2014



Sources: Chen-Fu Liao, University of Minnesota's Center for Transportation Studies.

Note: "Reachable by transit" refers to travel permitted by Central Corridor light rail (once operating) and/or up to two transfers by bus.

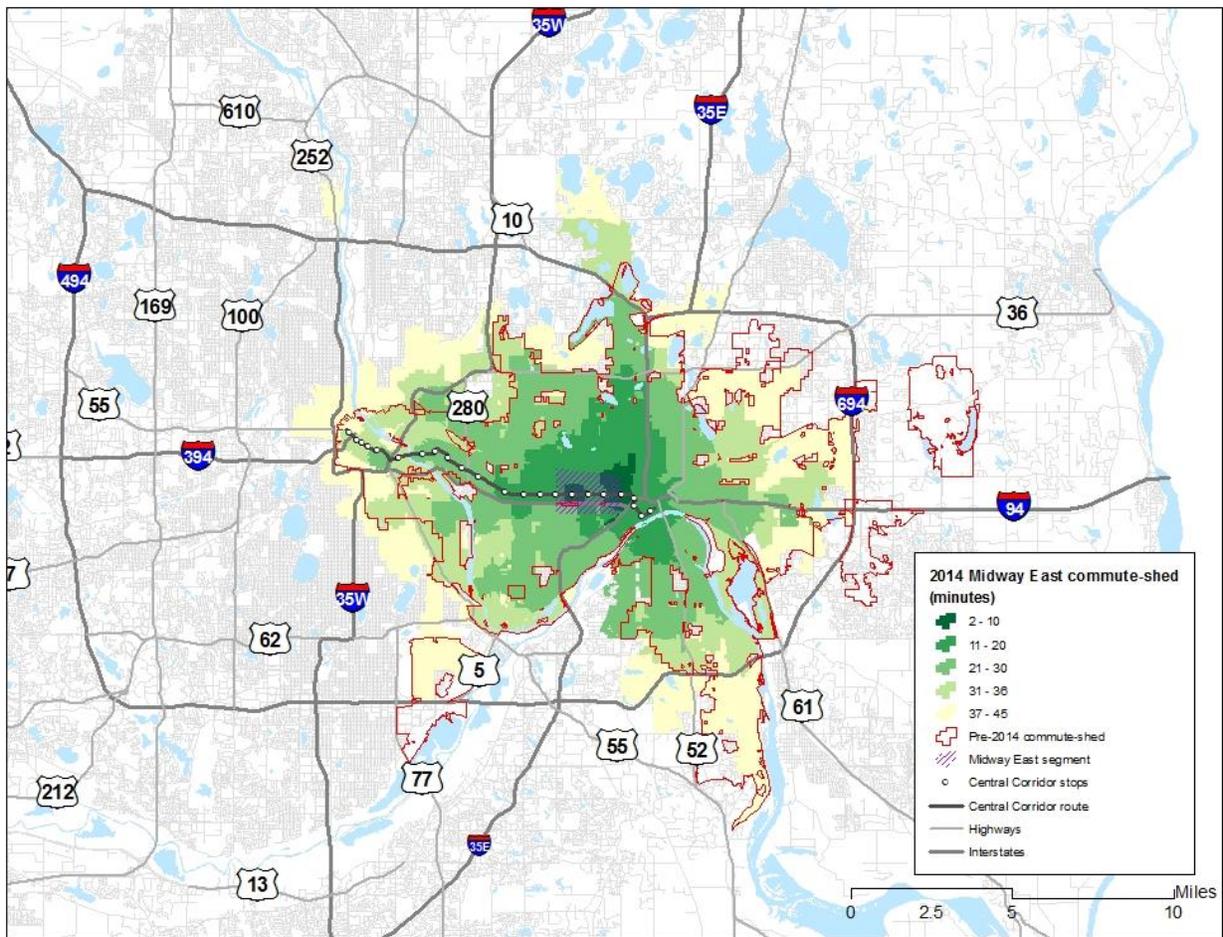
A17. Commute-shed reachable within 45 minutes by transit for residents of the Midway Central segment of the Corridor
Public transit system in 2014



Sources: Chen-Fu Liao, University of Minnesota's Center for Transportation Studies.

Note: "Reachable by transit" refers to travel permitted by Central Corridor light rail (once operating) and/or up to two transfers by bus.

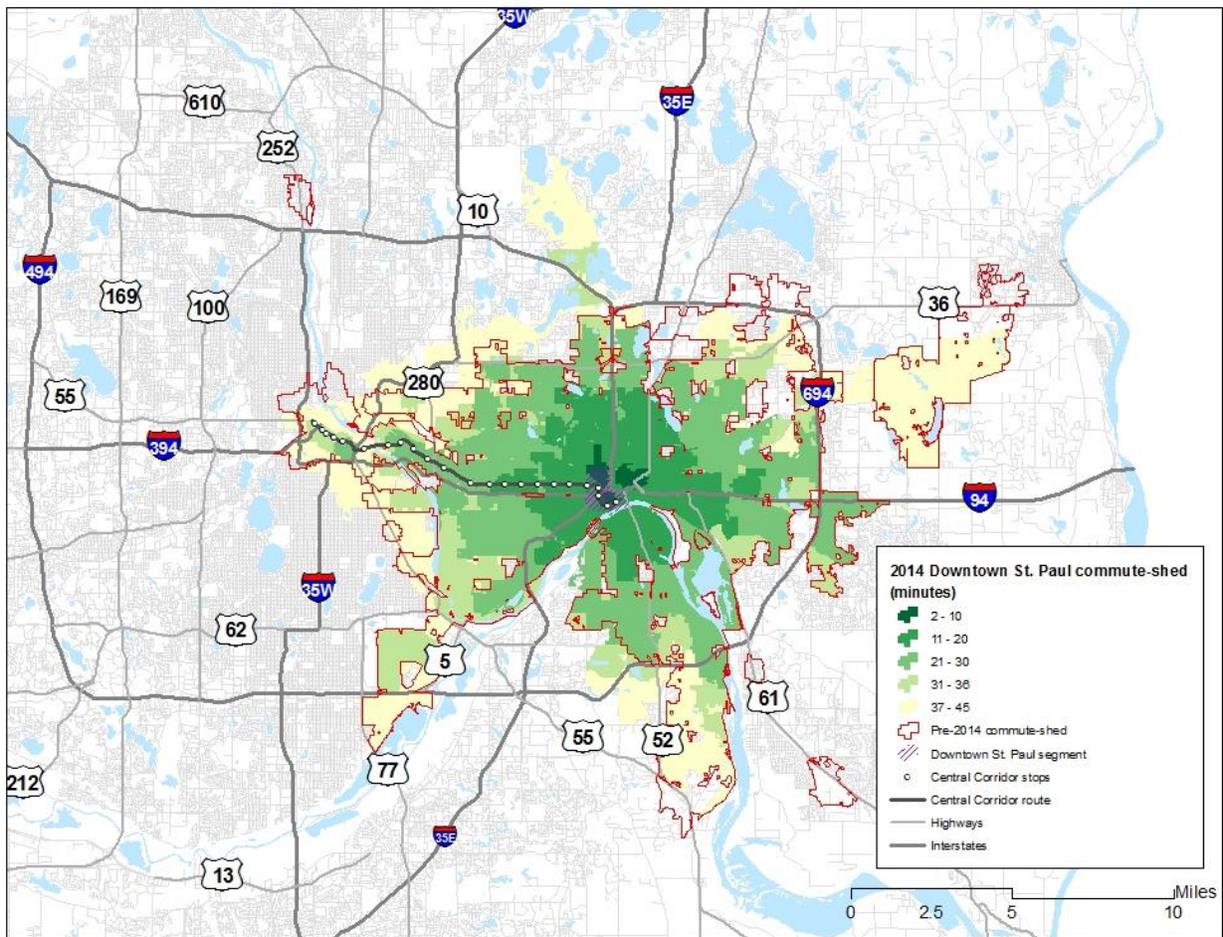
A18. Commute-shed reachable within 45 minutes by transit for residents of the Midway East segment of the Corridor
Public transit system in 2014



Sources: Chen-Fu Liao, University of Minnesota's Center for Transportation Studies.

Note: "Reachable by transit" refers to travel permitted by Central Corridor light rail (once operating) and/or up to two transfers by bus.

A19. Commute-shed reachable within 45 minutes by transit for residents of the Downtown St. Paul segment of the Corridor
Public transit system in 2014



Sources: Chen-Fu Liao, University of Minnesota's Center for Transportation Studies.

Note: "Reachable by transit" refers to travel permitted by Central Corridor light rail (once operating) and/or up to two transfers by bus.

Vibrant, transit-oriented places

A20. Business density, by segment

Central Corridor and Minneapolis-St. Paul, 2009-2013

	Total acres	Businesses						Density					
		2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
Downtown Minneapolis	1,452	3,342	3,319	3,343	3,358	3,207	3,274	2.30	2.29	2.30	2.31	2.21	2.21
UMN/ Environs	1,478	483	485	499	513	466	474	0.33	0.33	0.34	0.35	0.32	0.32
Midway West	1,877	912	898	886	901	885	897	0.49	0.48	0.47	0.48	0.47	0.47
Midway Central	1,189	449	442	460	465	451	485	0.38	0.37	0.39	0.39	0.38	0.38
Midway East	1,668	402	406	410	418	407	420	0.24	0.24	0.25	0.25	0.24	0.24
Downtown St. Paul	792	1,177	1,144	1,147	1,151	1,092	1,104	1.49	1.45	1.45	1.45	1.38	1.38
Central Corridor	7,894	6,765	6,694	6,745	6,806	6,508	6,654	0.86	0.85	0.85	0.86	0.82	0.84
Minneapolis-St. Paul	68,333	17,702	17,743	18,001	18,187	17,411	18,119	0.26	0.26	0.26	0.27	0.25	0.27

Source: Metropolitan Council, Minnesota Department of Employment and Economic Development (DEED).

Note: This dataset is a summary of second-quarter, 2009-2014 employment data from DEED Quarterly Census of Employment and Wages (QCEW) Employment Data. DEED compiles quarterly counts of employees, employer reporting establishments, and aggregate wages, covered by Unemployment Insurance in Minnesota, as part of a uniform nationwide reporting effort administered in partnership with the U.S. Bureau of Labor Statistics (BLS). Summary data is only available for those geographies where at least three employers exist and no one employer represents 80 percent or more of the total employment. 'Density' refers to employment site by acre as calculated using land acres of census tracts.

A21. Average Walk Score®, by segment*

Central Corridor, October 2010-2015

	2010	2011	2012	2013	2014	2015
Downtown Minneapolis	91.0	86.7	86.0	88.7	90.0	89.7
UMN/Environs	89.3	79.8	85.5	85.5	81.0	79.8
Midway West	79.5	77.3	80.8	73.8	67.3	67.0
Midway Central	83.3	79.3	83.7	85.0	79.3	79.7
Midway East	76.0	79.7	79.3	76.3	81.7	83.7
Downtown St. Paul	88.0	83.3	89.3	81.0	84.3	85.0

Source: www.walkscore.com

*100 = highest score

A22. Average Walk Score®, by corridor

October 2010-2015

	2010	2011	2012	2013	2014	2015
Lake Street Corridor	85.7	81.6	82.9	83.3	85.4	87.1
West 7th Corridor	57.9	59.8	61.8	58.7	52.2	55.0
Central Corridor	82.4	78.8	82.2	79.5	77.4	77.5

Source: www.walkscore.com

*100 = highest score

Demographic context

A23. Residents by race/ethnicity and nativity, by segment

Central Corridor, Minneapolis-St. Paul, and Corridor segments 2010-14

	Dwntn MPLS	UMN/ Environs	Midway West	Midway Central	Midway East	Dwntn St. Paul	Central Corridor	Minneapolis- St. Paul
American Indian	2%	0%	0%	0%	1%	0%	1%	1%
Asian	8%	15%	5%	5%	24%	14%	13%	10%
Black	23%	19%	14%	18%	37%	21%	24%	17%
White	63%	60%	75%	72%	28%	62%	56%	64%
Other race	1%	2%	3%	2%	3%	0%	2%	3%
Two or more races	3%	4%	4%	3%	7%	2%	4%	5%
Hispanic (of any race)	3%	3%	5%	7%	7%	3%	5%	10%
Foreign-born	18%	28%	11%	11%	27%	18%	20%	16%
Total	23,539	24,154	8,837	15,082	25,574	10,442	107,628	710,914

Source: race/ethnicity - U.S. Census Bureau, American Community Survey, 2010-14; total population - Metropolitan Council, 2014