Stadium Village/University Avenue Spring 2011 Survey

1. What is your role in the area? (check all that apply)

	Response Percent	Response Count
Resident	23.4%	105
Student	15.6%	70
Employee	**61.6%**	**276**
Visitor or Customer	22.5%	101
Property owner/landlord	8.7%	39
Business owner	4.5%	20
Other (please specify)	5.6%	25
	answered question	**448**
	skipped question	**0**

2. What characteristics of the area are most important to you? (check all that apply)

	Response Percent	Response Count
Access to U of M campus	**75.2%**	**336**
Access to job/workplace	54.8%	245
Central location in city/region	34.2%	153
Availability of retail/services	49.2%	220
Sense of community/good place to live	43.2%	193
Recreational/entertainment opportunities	30.6%	137
Quality housing options	23.3%	104
Mass transit options	58.4%	261
Access to customers	14.3%	64
Ability to walk/bike around area	66.2%	296
Friends/family live nearby	12.1%	54
Cultural/educational opportunities	32.9%	147
Sustainable/green living	36.9%	165
Access to highways	36.2%	162
Other (please specify)	7.2%	32
	answered question	**447**
	skipped question	**1**

3. What are some of the biggest challenges facing the area? (check all that apply)

	Response Percent	Response Count
Not enough parking	**59.6%**	**266**
Lack of quality places for walking/bicycling	33.4%	149
Lack of parks or other public spaces	29.1%	130
Not enough or wrong mix of retail/services	36.3%	162
Lack of ownership or sense of community	20.2%	90
Livability: noise, litter, unruly behavior	24.4%	109
Traffic safety	42.8%	191
Traffic congestion	58.1%	259
Property maintenance problems	14.8%	66
Public safety/crime	35.0%	156
Rapid change/high turnover	10.1%	45
Lack of good housing options	9.9%	44
Other (please specify)	10.3%	46
	answered question	**446**
	skipped question	**2**

4. In the future, what would you like to see more of in this area? (check all that apply)

	Response Percent	Response Count
New housing	16.0%	71
Retail/services	54.4%	241
Public spaces/parks	47.6%	211
Parking	51.9%	230
Bicycle and pedestrian connections	**62.5%**	**277**
Other (please specify)	13.8%	61
	answered question	**443**
	skipped question	**5**

5. How do you typically travel in the area? (check all that apply)

	Response Percent	Response Count
Drive alone	**62.6%**	**276**
Carpool/car sharing	19.5%	86
Bus	42.4%	187
Bicycle	26.3%	116
Walk	51.2%	226
Other (please specify)	3.4%	15
	answered question	**441**
	skipped question	**7**

6. If you drive here, how far are you willing to walk/bike from where you park to your destination?

	Response Percent	Response Count
1 block	8.7%	33
2 blocks	25.1%	95
3-4 blocks	**31.9%**	**121**
5+ blocks	22.7%	86
Other (please specify)	11.6%	44
	answered question	**379**
	skipped question	**69**

7. What will you most likely do if your current parking arrangement(s) are disrupted by LRT?

	Response Percent	Response Count
No change	**26.8%**	**109**
Reduce your frequency of travel to the area	24.1%	98
Rely more on alternative transportation mode (bike, bus, etc.)	24.6%	100
Continue to drive and make new parking arrangements	24.4%	99
	answered question	**406**
	skipped question	**42**

8. If you decide to drive to the area after LRT is implemented, where do you think you'll park?

	Response Percent	Response Count
University of Minnesota parking facility	**53.6%**	**200**
Privately-owned parking facility	13.7%	51
On-street parking	32.7%	122
	answered question	**373**
	skipped question	**75**

9. University of Minnesota parking facilities that permit public/visitor parking charge $1.25 per hour at meters and between $3 and $12 in ramps (depending on the length of time parked). Are these rates suitable for your parking needs?

	Response Percent	Response Count
Yes	45.8%	189
No	**54.2%**	**224**
	answered question	**413**
	skipped question	**35**

10. If new housing is built in the area, please describe for whom the housing should be constructed. (check all that apply)

	Response Percent	Response Count
Doesn't matter/anyone	30.2%	129
Owners	28.8%	123
Renters	25.5%	109
Students	45.2%	193
Families	26.5%	113
Young professionals	**49.2%**	**210**
Empty nesters	17.1%	73
Seniors	23.2%	99
Low income households	12.9%	55
Other (please specify)	7.5%	32
	answered question	**427**
	skipped question	**21**

11. What sort of development would you like to see more of in the area? (check all that apply)

	Response Percent	Response Count
Grocery/supermarket	**81.8%**	**346**
Clothing/accessories	20.3%	86
Personal services	16.3%	69
Hardware/home improvement	24.1%	102
Quick service restaurant	18.0%	76
Sit down restaurant	39.5%	167
Coffee shop/bakery	33.3%	141
Restaurant/coffee shop outdoor seating	45.6%	193
Entertainment/bars	17.0%	72
Financial services	5.2%	22
General merchandise store	39.2%	166
Industrial/office park	6.4%	27
Other (please specify)	13.5%	57
	answered question	**423**
	skipped question	**25**

12. What barriers to new development exist in the area? (check all that apply)

	Response Percent	Response Count
High cost of land	41.7%	161
Unwilling sellers	13.2%	51
Regulatory requirements	19.4%	75
Lack of large sites	28.2%	109
Insufficient public infrastructure	18.4%	71
Quality of surrounding development	28.2%	109
Financing	18.9%	73
Lack of parking	**67.1%**	**259**
Traffic patterns	52.8%	204
Other (please specify)	15.8%	61
	answered question	**386**
	skipped question	**62**

13. Please provide any additional comments here.

	Response Count
	103
answered question	**103**
skipped question	**345**

Stadium Village/University Avenue Parking and Transportation Study

Phase 1: Draft Technical Report

May 18,2011

BIKO ASSOCIATES INCORPORATED

Introduction:

This technical report presents findings from Phase 1 of the Stadium Village/University Avenue Parking and Transportation Study. Phase 1 activities included:

- Field scoping and inventory to quantify existing parking supply and assess parking behavior and characteristics
- Review of previous plans and studies on parking and transportation
- Interviews with individual stakeholders and stakeholder groups

Background and Purpose:

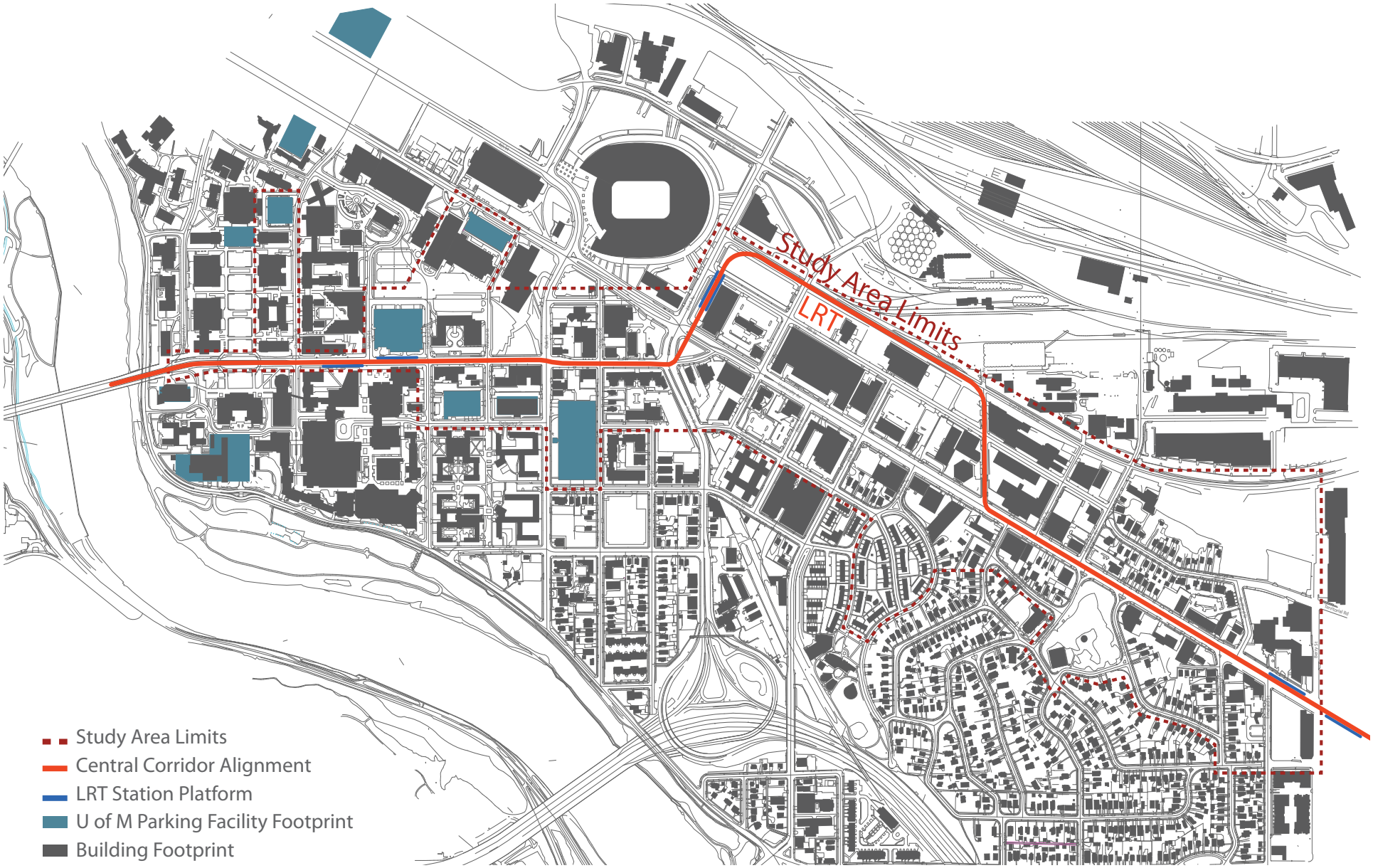
Background:

As illustrated on the page, the study area for this project is largely within the City of Minneapolis but extends just east beyond the Minneapolis/Saint Paul border. The study area includes four Central Corridor Light Rail Transit (CCLRT) stations, which are, from east to west:

- Westgate Station, on University Avenue between Curfew and Emerald Streets
- 29th Avenue Station, on 29th Avenue between University Avenue and 4th Street
- Stadium Village Station, on 23rd Avenue between 4th Street and University Avenue
- East Bank Station, on Washington Avenue between Harvard and Church Streets

Although the Westgate Station is in the City of Saint Paul, the westbound station platform terminates at Emerald Street (the border between Saint Paul and Minneapolis). Because of this proximity to Minneapolis, its associated parking and transportation issues will affect Minneapolis.

The CCLRT alignment will impact existing parking and traffic operations throughout the study area. One of the design goals for the LRT alignment was to leave the number of existing general (moving) traffic lanes unaffected. Therefore, the alignment's design (which includes two LRT tracks within a semi-protected right-of-way) requires the elimination of existing on-street parking spaces in order to maintain four general traffic lanes on University Avenue and two lanes on 29th and Washington Avenues. In addition, the design includes a barrier that will prevent motorists from crossing the tracks (accomplishing U-turns and left-turns) at uncontrolled locations. Compared to the existing condition where motorists can accomplish U-turns and left-turns almost anywhere along the affected streets, the future condition will only permit these turns to be made at signalized intersections.
These two, post-LRT physical conditions (the elimination of on-street parking and the prohibition of U-turns and left-turns at unsignalized intersections) are the major reasons the Stadium Village/University Avenue Parking and Transportation Study was commissioned. At the same time, it was recognized that even today there are parking and transportation issues within the study area. The study area is home to the University of Minnesota, with almost 52,000 students and nearly 17,100 employees. The campus itself is an urban setting, which shares the study area with a compact and densely developed mix of uses including commercial offices, retail establishments, institutional uses, and residential neighborhoods. Finally, the two major streets serving the study area, Washington and University Avenues, either directly or indirectly provide access to some of the region's largest trip generators. Beyond providing access to jobs, educational services, businesses, and residences, these two streets have regional significance by virtue of their geographic locations and functional classifications. Washington Avenue is one of the bridges over the Mississippi River, and University Avenue is US Highway 52 in the vicinity of Stadium Village. Both streets are "A" Minor Arterial relievers in the Twin Cities Metropolitan Highway Plan, and, therefore, carry significant through traffic volumes.


Study Area Limits
LRT
Study Area Limits
Central Corridor Alignment
LRT Station Platform
U of M Parking Facility Footprint
Building Footprint

Purpose:

The Stadium Village/University Avenue Parking and Transportation Study was commissioned to address three purposes. The first is to look at the short-term to address existing parking issues in order to maximize the efficiency of existing supplies of public and private parking in the area. Measures of efficiency for this study are defined as "layout and utilization."

The second purpose is to address parking in the future, under a long-term scenario where LRT implementation will result in: a) the almost total elimination of on-street parking on University, 23rd, 29th, and Washington Avenues and b) reduced U-turn and left-turn opportunities. This purpose includes development of approaches to both: a) ensure/increase utilization of LRT and other non-auto modes of travel and b) reconfigure parking facilities so that those who must drive/park can do so efficiently. The third purpose applies to both the existing and future conditions but is mostly focused on the long-term. This purpose is to provide guidance on infrastructure and traffic circulation improvements that will facilitate:

- safe and efficient accessibility to/from parking supplies
- safety and efficiency of the overall transportation system serving the area

Recommendations developed for the second and third purposes will be incorporated in the Stadium Village Station Area Plan, a planning document that will be jointly prepared by the City of Minneapolis, Hennepin County, and the University of Minnesota. The Station Area Plan will proactively position the public and private sectors to optimize benefits from LRT implementation and operations and minimize potentially negative impacts.

Study Area:

Study Area Definition

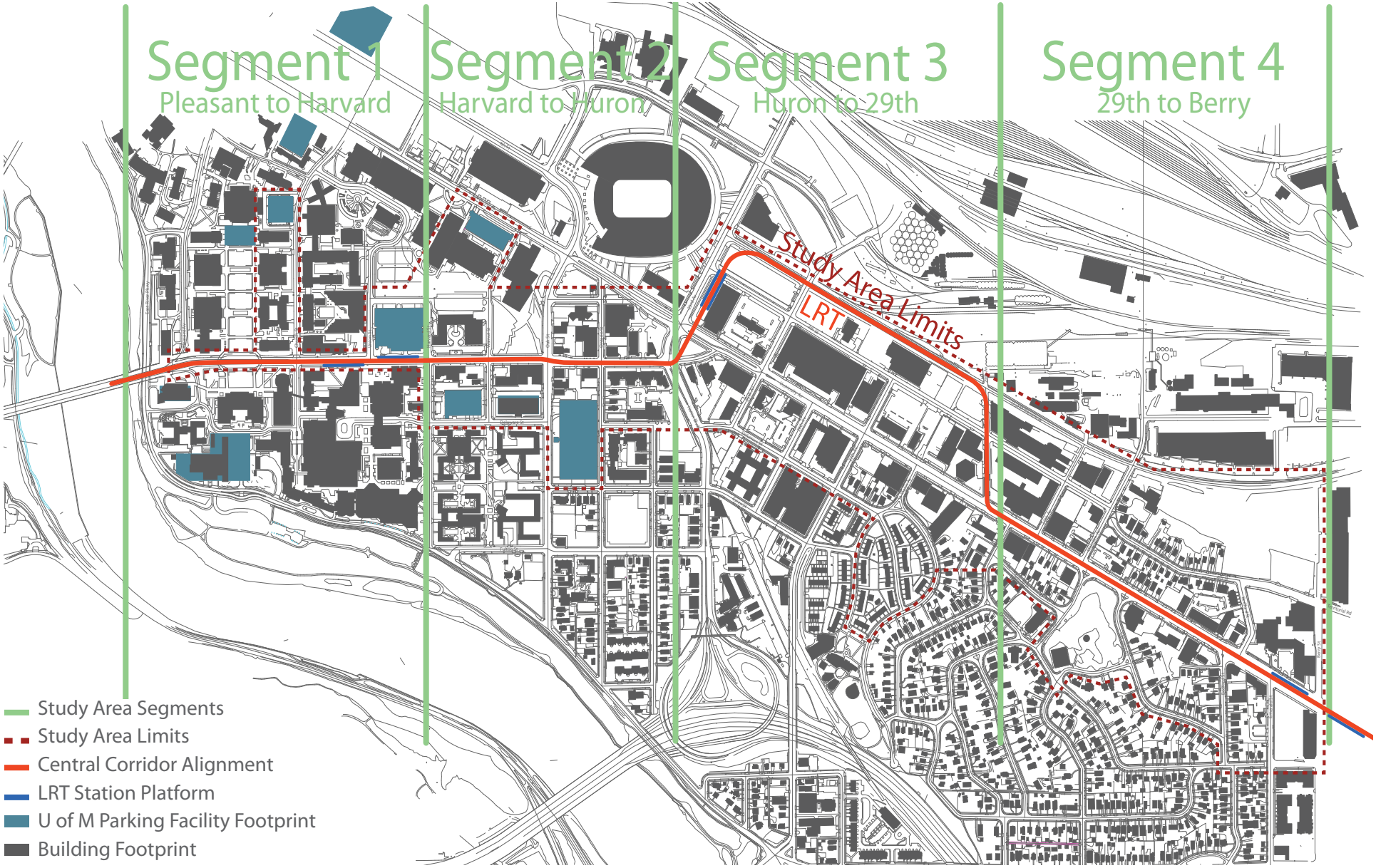
The definition of the project study area was informed by a number of factors. Among these were:

- the CCLRT alignment design, which will require the elimination of on-street parking and the elimination of U-turns and left-turns at uncontrolled locations along impacted streets
- discussions with stakeholders (residents, business owners/operators, and University of Minnesota Parking and Transportation Services) to understand existing parking and transportation issues as well as those anticipated to occur with LRT implementation
- inventory of land use destinations
- research and discussions with the project's Technical Advisory Committee (TAC) on the locations and extent of future parking supply reductions, existing parking demand, existing parking markets, and parking behavior that is dependent on factors such as cost, trip purpose and intended duration of parking, distance between the parking supply and the destination, characteristics of the pedestrian environment between the parking supply and the parker's destination, etc.
- locations where excess parking capacity may be found, within a reasonable walk distance from destinations

The study area is shown to extend east to west from Berry Street in Saint Paul to the Pleasant Street on the western edge of the University of Minnesota's East Bank Campus. The northern border of the study area is the University of Minnesota Transitway from Berry Street to 23rd Avenue. West of 23rd Avenue, the northern border is generally Beacon Street. The southern study area boundary is generally one block off University Avenue, following Delaware and Essex Streets and, moving toward the western edge of the campus, East River Parkway.

Study Area Segments:

The study area was divided into four segments based on the physical location of CCLRT tracks and stations and an assessment of land use types and expected travel/parking behavior. From west to east, the four study area segments are:



Segment 1 — Pleasant to Harvard Street:

The CCLRT tracks in Segment 1 will be in the center of Washington Avenue, and the East Bank Station will be constructed as staggered (or split side) platforms on either side of Union Street. Land use within this segment consists of University of Minnesota classroom buildings, lecture halls, and the student union building. There are three University of Minnesota parking facilities in Segment 1 that provide hourly parking for "Transients" (visitors to the Stadium Village Area and/or non-contract parkers). These are the Church Street Garage (CSG) and Washington Avenue Ramp (WAR) on the north side of Washington Avenue and the East River Road Garage (ERRG) on the south side. The CSG has 237 stalls for transients, the WAR has 571 stalls, and the ERRG has 500.

Segment 2 — Harvard to Huron Street:

On-street, metered parking is currently permitted along Washington Avenue, between Harvard and Huron Streets in Segment 2. With implementation of LRT, where the tracks will be located in the center of Washington Avenue, all on-street parking will be eliminated. Land use within Segment 2 includes the Radisson Hotel and the McNamara Alumni Center on the north side of Washington Avenue, between Harvard and Oak Streets. Remaining uses within this segment consist of residential (Dinnaken House, a student housing development) on the south side of Washington Avenue and commercial/retail on both sides of Washington Avenue.

Metered parking is provided in a plaza-like, off-street parking lot in front of the Radisson Hotel on the north side of Washington Avenue. Dinnaken House provides on-site parking for its tenants, and while many of the commercial/retail uses do not have off-street parking lots, some do have small, off-street parking lots along the side or to the rear of buildings.

University of Minnesota parking facilities in Segment 2 that accommodate transient parkers are the University Avenue Ramp (UAR) with 145 transient stalls and the Oak Street Ramp (OSR) with 350 transient stalls.

Segment 3 — Huron Street to 29th Avenue:

The CCLRT tracks in Segment 3 will be along the east side 23rd Avenue, along the south side of the University of Minnesota Transitway, and in the center of 29th Avenue. The Stadium Village Station, which will be constructed as side-by-side platforms, will be located on 23rd Avenue between 4th Street and University Avenue. The 29th Avenue Station will be constructed as a single center platform on 29th Avenue between 4th Street and University Avenue. As a result of LRT implementation, on-street parking, which is currently permitted on the west side of 29th Avenue, will be eliminated.

The University of Minnesota/TCF Bank Stadium, recently constructed at the intersection of 23rd Avenue and the University of Minnesota Transitway, is the dominant land use within Segment 3. University of Minnesota surface parking lots surround the stadium on its northeast side. One of the surface lots is the Gopher (GOPH) lot, which provides 55 stalls for transient parkers.

Segment 3 further includes uses with front doors on 4th Street and backdoors on the Transitway. These uses include University of Minnesota research facilities such as the Thompson Center for Environmental Management and the Mast Laboratories; University Landcare Facilities and Operations Building; and the University Business Center. Mixed in with these University of Minnesota uses are privately owned industrial businesses, which also front on 4th Street.

Located at the eastern end of Segment 3, where 29th Avenue intersects 4th Street, are more industrial uses that extend along 4th Street to the east. A privately owned, surface parking lot is located in the northwest quadrant of the 29th Avenue/4th Street intersection, and the University Plaza office building (and its associated parking ramp) are located on the west side of 29th Avenue between 4th Street and University Avenue.

On-street parking is permitted along the west side of 29th Avenue between 4th Street and University Avenue.

Segment 4 — 29th Avenue to Berry Street:

The LRT tracks will operate in the center of University Avenue within Segment 4, which will result in the elimination of all on-street parking except for two locations where parking bays will be constructed. These two locations are on the north and south sides of University Avenue between Clarence and Bedford Streets.

Land use within Segment 4 includes a mix of residential (once single family homes that were converted to student-oriented, multi-unit homes on both sides of University Avenue and a condominium development on the south side), single family and duplex residential in the Prospect Park neighborhood on the south side of University Avenue, and commercial/retail and institutional uses that front both sides of University Avenue. The predominant use along both sides of University Avenue is commercial/retail; some of which is located in large developments like the Prospect Pak Business Center, the Teamsters' Building, and Tierney Brothers. The large commercial/retail developments provide on-site parking that appears to be adequately sized to meet demand.
The smaller commercial/retail developments, such as the Textile Center, either have small off-street parking lots or none at all. In either case, these establishments rely on on-street parking to meet some or all of their parking demand.

The M-Flats condominium development on the south side of University provides on-site parking for its residents. The student-oriented, multi-family residential uses along the north and south sides of University Avenue have driveways off University Avenue, and residents park their cars in the driveways, on the front lawns, and in on-street spaces on University Avenue. Parking in the Prospect Park neighborhood is accommodated both on-street and in private, residential driveways.

Field Scoping & Inventory:

Findings from the field scoping and inventory are presented by study area segment in this section of the report. Tables 1 through 4, which follow in this section of the report, detail on-street and off-street parking supplies within the study area. The on-street supplies described in the tables only include those parking spaces that are along the LRT alignment. The off-street supplies only include those spaces that are available for public parking. The term "public" refers to spaces reserved for transient parkers at University of Minnesota parking facilities and public parking spaces that are provided for in association with a building, such as a commercial office or retail building. The table does not include off-street, private parking; i.e., off-street parking spaces that are reserved for residents of student housing facility or condominium, employees of a business, or loading operations.

Segment 1 — Pleasant to Harvard

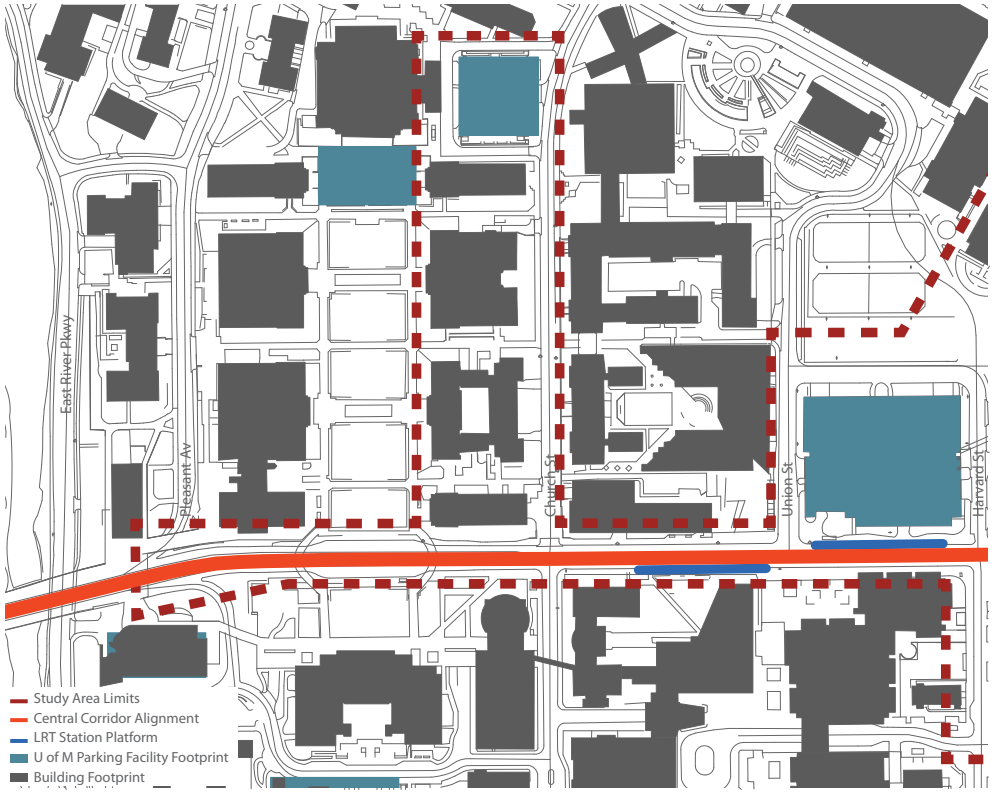


Table 1: Segment 1 Parking Supply Inventory

	On-Street		Off-Street	
Location	Existing	Post-LRT Implementation	Existing	Post LRT Implementation
North side of Washington: Pleasant to Church	0	0	237	237
South side of Washington: Pleasant to Church	0	0	500	500
North side of Washington: Church to Union	0	0	0	0
South side of Washington: Church to Union	0	0	0	0
North side of Washington: Union to Harvard	0	0	571	571
South side of Washington: Union to Harvard	0	0	0	0
Total	0	0	1308	1308

Source: Biko Associates Inc., May 18, 2011

As shown in Table 1, there are no on-street parking spaces along Washington Avenue in Segment 1, and the total number of off-street parking stalls available to the public in Segment 1 is 1,308. These spaces are available for transient parkers in three University of Minnesota parking facilities. As LRT implementation will not impact off-street parking in Segment 1, there will be no reduction in parking supply in this segment access between the three University of Minnesota Parking facilities and Washington Avenue, however, will no longer be permitted once LRT is implemented.

Segment 2 — Harvard to Huron

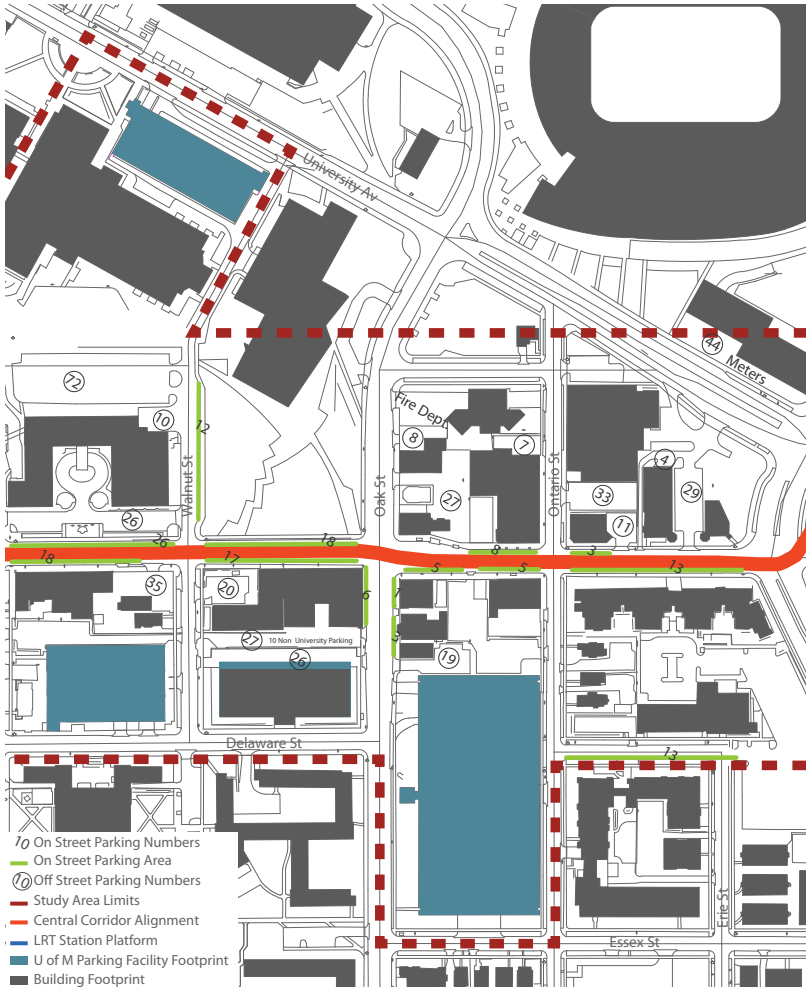


Table 2: Segment 2 Parking Supply Inventory

	On-Street		Off-Street	
Location	Existing	Post-LRT Implementation	Existing	Post LRT Implementation
North side of Washington: Harvard to Walnut	26	0	253	253
South side of Washington: Harvard to Walnut	18	0	35	35
North side of Washington: Walnut to Oak	18	0	0	0
South side of Washington: Walnut to Oak	17	0	30	30
North side of Washington: Oak to Ontario	8	0	42	42
South side of Washington: Oak to Ontario	10	0	369	369
North side of Washington: Ontario to Huron	3	0	73	73
South side of Washington: Ontario to Huron	13	0	0	0
East side of Oak: Washington to Delaware	4	4	-	-
West side of Oak: Washington to Delaware	6	6	-	-
East side of Walnut: Washington to Beacon	12	12	-	-
Total	135	22	802	802

Source: Biko Associates Inc., May 18, 2011

Segment 2 — Harvard to Huron

The LRT alignment design will require the elimination of all on-street parking in Segment 2 and the elimination of automobile traffic between Pleasant and Harvard Streets. Motorists will be allowed to drive on Washington Avenue east of Harvard Street, but driving across the tracks will not be permitted. One hundred-thirty-five (135) on-street parking spaces were inventoried along Washington Avenue and the north/south cross streets in segment 2, and all of these will be eliminated. Twenty-two on-street spaces along the north/south streets will remain available.

The inventory of off-street stalls found there is a total of 802 stalls in Segment 2, and none of this supply will be reduced by LRT implementation. Of this total 495 University of Minnesota stalls, designated for transient parkers, are located in two parking ramps. In addition, there are 307 stalls in 14, small lots. Each of the 14 lots is a private lot where stalls are available for public use, except the lot in the alley behind Sally's where 16 of the 26 stalls are reserved for University of Minnesota use.

Direct accessibility between the off-street lots and Washington Avenue will be affected by LRT implementation. Circuitous routing will be required to access the two University of Minnesota ramps in Segment 2 and two of the 14 surface lots, which currently have a driveway on Washington Avenue.

Segment 3 — Huron to 29th

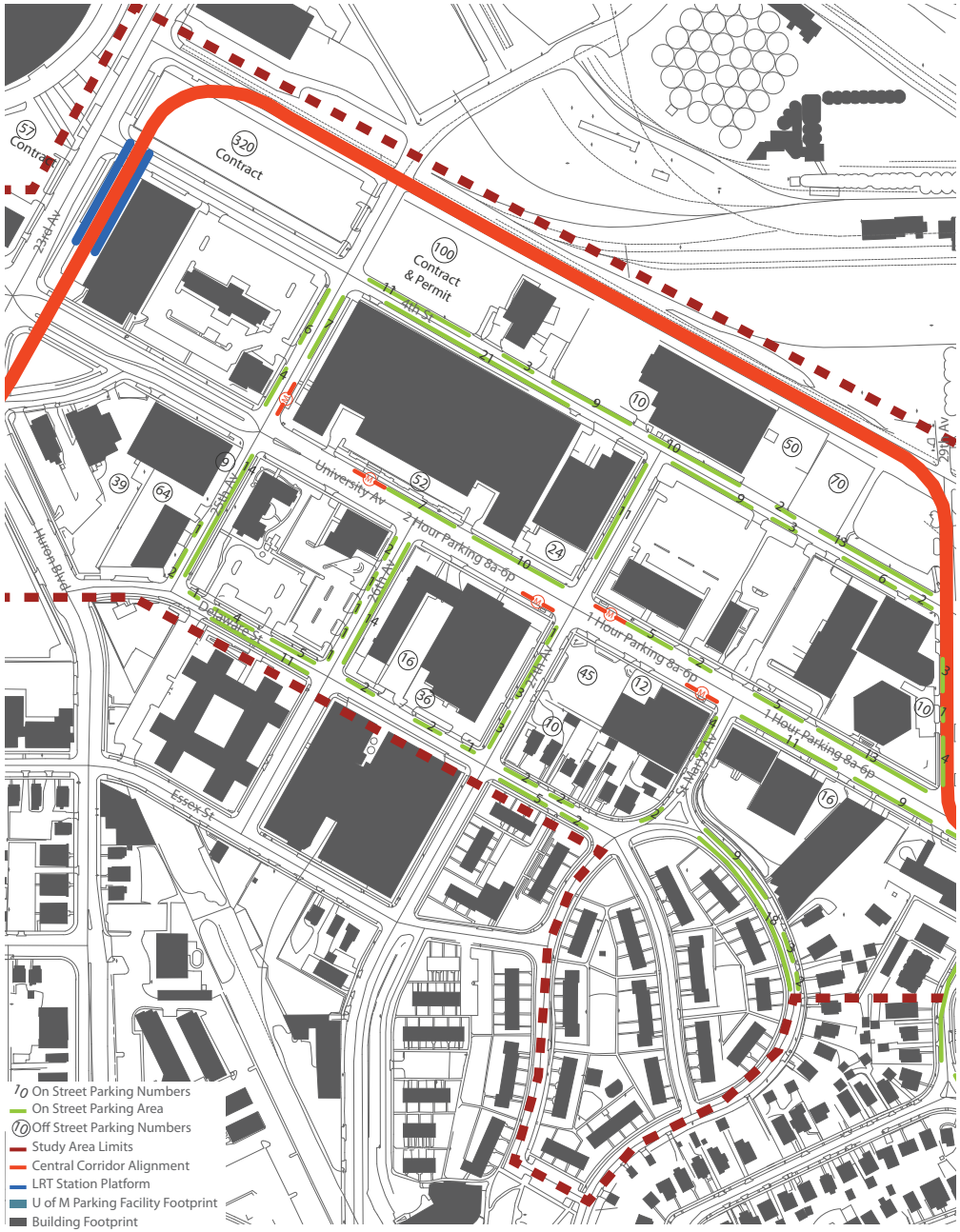


Table 3: Segment 3 Parking Supply Inventory

	On-Street		Off-Street	
Location	Existing	Post-LRT Implementation	Existing	Post LRT Implementation
North side of University: 23rd to 25th	0	0	320 Contract	320 Contract
South side of University: Huron to 25th	0	0	112	112
North side of University: 25th to 27th	17	17	186	186
South side of University: 25th to 26th	0	0	0	0
South side of University: 26th to 27th	0	0	52	52
North side of University: 27th to 29th	25	25	230	230
South side of University: 27th to St. Marys	0	0	67	67
Southside of University: St. Marys to Arthur	24	24	16	16
East side of 25th Avenue: 4th to University	7	7	-	-
West side of 25th Avenue: 4th to University	6	6	-	-
East side of 25th Avenue: University to Delaware	14	14	-	-
West side of 25th Avenue: University to Delaware	3	3	-	-
North side of 4th Street: 25th to 27th	23	23	-	-
South side of 4th Street: 25th to 27th	21	21	-	-
North side of 4th Street: 27th to 29th	25	25	-	-
South side of 4th Street: 27th to 29th	20	20	-	-
East side of 26th Avenue: University to Delaware	14	14	-	-
West side of 26th Avenue: University to Delaware	6	6	-	-
West side of 27th Avenue: University to Delaware	7	7	-	-
West side of 27th Avenue: University to 4th	11	11	-	-
St. Marys Avenue:	6	6	-	-
West side of 29th Avenue: University to 4th	8	0	-	-
Total	237	229	983	983

Source: Biko Associates Inc., May 18, 2011

Segment 3 — Huron Street to 29th Avenue

The LRT tracks will run along the eastern side of 23rd Avenue and along the south side of the University of Minnesota Transitway. As a result, on-street parking within this segment of the study area will not be as severely impacted as it will be others. Eight of 237 on-street parking spaces will be eliminated as a result of LRT implementation.

As shown in Table 3, none of the off-street parking supply, which is all contract parking, will be affected by LRT.

Segment 4 — 29th to Berry

Table 4: Segment 4 Parking Supply Inventory

	On-Street		Off-Street	
Location	Existing	Post-LRT Implementation	Existing	Post LRT Implementation
North side of University: 29th to Arthur	3	0	52	52
South side of University: 29th to Arthur	4	0	0	0
North side of University: Arthur to 30th	9	0	13	13
South side of University: Arthur to 30th	8	0	29	29
North side of University: 30th to Malcolm	8	0	74	74
South side of University: 30th to Malcolm	8	0	24	24
North side of University: Malcolm to Clarence	6	0	31	31
South side of University: Malcolm to Clarence	5	0	0	0
North side of University: Clarence to Bedford	19	5	97	97
South side of University: Clarence to Bedford	15	10	94	94
North side of University: Bedford to Eustis	0	0	122	122
South side of University: Bedford to Eustis	0	0	84	84
North side of University: Eustis to Berry	0	0	75	75
South side of University: Eustis to Berry	0	0	0	0
Total	85	15	695	695

Source: Biko Associates Inc., May 18, 2011

Segment 4 ---- 29th Avenue to Berry Street

The inventory showed that there are 85 on-street parking spaces along University Avenue in Segment 4. As shown in Table 4, these are all within the City of Minneapolis. All but 15 of these will be eliminated when LRT is implemented.

Also within segment 4 are 695 off-street parking stalls. None of these will be eliminated with LRT implementation, although convenient access between University Avenue and the off-street parking facilities will be less convenient than it is today. The off-street stalls are located in parking facilities that are generally not open for all-day public use. Instead, they are associated with a specific building or land use. Therefore, it would not be acceptable to use these off-street facilities, without making prior arrangements with property owners/managers, to absorb demand that will be lost when LRT is implemented and 70 on-street spaces are eliminated.

Memorandum

Bonestroo

2335 Highway 36 W
St. Paul, MN 55113

Tel 651-636-4600
Fax 651-636-1311

www.bonestroo.com

To: Andrew Gillett, Haila Maze, Monique MacKenzie	Project: Stadium Village Market Study	Date: 06-01-2011
From: Jay Demma	Client: Hennepin County, City of Minneapolis, University of Minnesota	
Re: Assumptions Used in Retail Calculations and Forecasts		File No.: 001964-11004-0

Methodology for Calculating Retail Potential

Generalized Approach

		Persons
(times)	x	Per Capita Income
(equals)	=	Aggregate Income
(times)	x	Proportion of Spending per Consumer Category
(equals)	=	Total Dollars Spent
(times)	x	Proportion Spent within Study Area
(equals)	=	Total Dollars Spent within Study Area
(divide)	/	Average Sales per Square Foot
(equals)	=	Total Supportable Square Feet
(less)	-	Existing Retail Space
(equals)	=	Additonal Supportable Retail Square Feet

Primary sources of demand come from four types of persons:

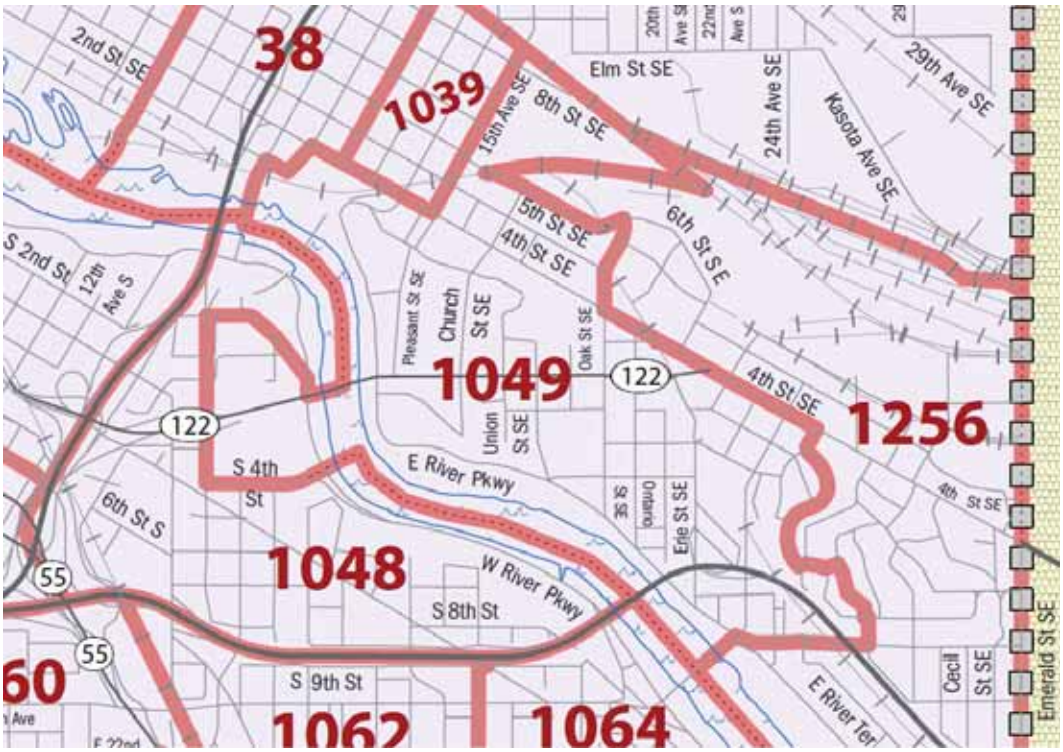
1) Residents who live within or nearby the study area
2) Employees who work within or nearby the study area
3) Students who do not live in the study area but visit on a regular basis to attend classes or other school-related activities
4) Other visitors, which would primarily consist of persons visiting the University hospital or related medical facilities, University sporting events, and other similar destination purposes

Resident Assumptions

Population in 2010

Based on US Census figures for Census Tract 1049 (formerly 1040), which generally corresponds to the Stadium Village station area. Although portions of Tract 1256 would also include the Stadium Village station area, the populated portions of the tract are well east of Stadium Village and would be more oriented to Prospect Park and the 29th Avenue station area.

2010 Census Tract Boundaries



Population in 2020

Population growth forecasts were based on findings from Maxfield Research's Comprehensive Housing Analysis for the University District. On page 8, Table D1 of that report, it shows that for the Prospect Park neighborhood, as defined by its formal City of Minneapolis boundaries, which includes most of the residential portion of Stadium Village, the area is forecasted to grow anywhere from 910 persons (low estimate) to 1,720 persons (high estimate) between 2010 and 2020, depending on the availability of sites for new housing development. Therefore, a similar method of using a low, medium, and high estimate was utilized in this analysis as well.

Income

Income is per capita and broken down by age group based on 2005-2009 ACS data, which is the most recent US Census data available on income.

Adjustments were made for the 18-24 age group (i.e., students) because their spending potential is not directly related to their income since many parents continue to financially support students, especially during their undergraduate years. Therefore, student spending was adjusted to be 137% of income. This was based on a 2006 Student Monitor survey of 1,200 students at 100 different college campuses, which found that 41% of a typical student budget consists of family assistance.

Consumer Spending

Because not all income is spent on consumer goods and services, we used the Consumer Expenditure Survey (CES) prepared by the US Department of Labor's Bureau of Labor Statistics to estimate how much income is spent on consumer goods and services broken down by consumer categories and age group. The spending categories tracked by the CES that most closely correspond to retail and other commercial uses include the following:

- Food at Home (i.e., grocery)
- Food Away from Home (i.e., bars and restaurants)
- Alcoholic Beverages (i.e., liquor stores)
- Housekeeping Supplies
- Household Furnishings
- Apparel
- Drugs & Medical Supplies
- Entertainment (excl fees)
- Personal Care Products and Services
- Tobacco

Leakage

The vast majority of a person's consumer spending typically occurs close to where they live. However, some residents regularly spend dollars outside of their immediate neighborhood because of normal life routines, such as work, recreation, travel, or other activities. The amount of spending that occurs outside of a person's neighborhood is described as "leakage." Because the Stadium Village area is a highly dense urban environment populated mostly with students, many of which do not have cars, leakage is low relative to other neighborhoods.

Unfortunately, there is no ideal data set with which to accurately measure leakage. Nonetheless, we have tried to estimate the proportion of resident spending that would likely occur outside of the immediate Stadium Village neighborhood taking into consideration the prevalence of car ownership and the overall affluence (or lack thereof) of residents. The following are assumptions regarding what proportion of resident spending would likely occur outside of the immediate neighborhood:

- Food at Home 5%
- Food Away from Home 25%
- Alcoholic Beverages 10%
- Housekeeping Supplies 0%
- Household Furnishings 0%
- Apparel 10%
- Drugs & Medical Supplies 15%
- Entertainment (excl fees) 10%
- Personal Care Products and Services 15%
- Tobacco 25%

Please keep in mind that these proportions do not necessarily reflect spending that occurs outside of the immediate neighborhood because residents are forced to shop elsewhere due to a lack of retail options. We do not account for this because we want to gauge in some manner how much retail could be supported through localized spending if the need were being met.

Seasonality

We've also tried to account for the impact of the seasonal school schedule on student spending. Therefore, we have modified the overall spending potential of Stadium Village residents downward by 15%. Although the standard school year is approximately nine months, we chose to limit the downward impact of spending because not all residents of the Stadium Village are students nor do all students only live in the area for nine months.

Supportable Square Footages

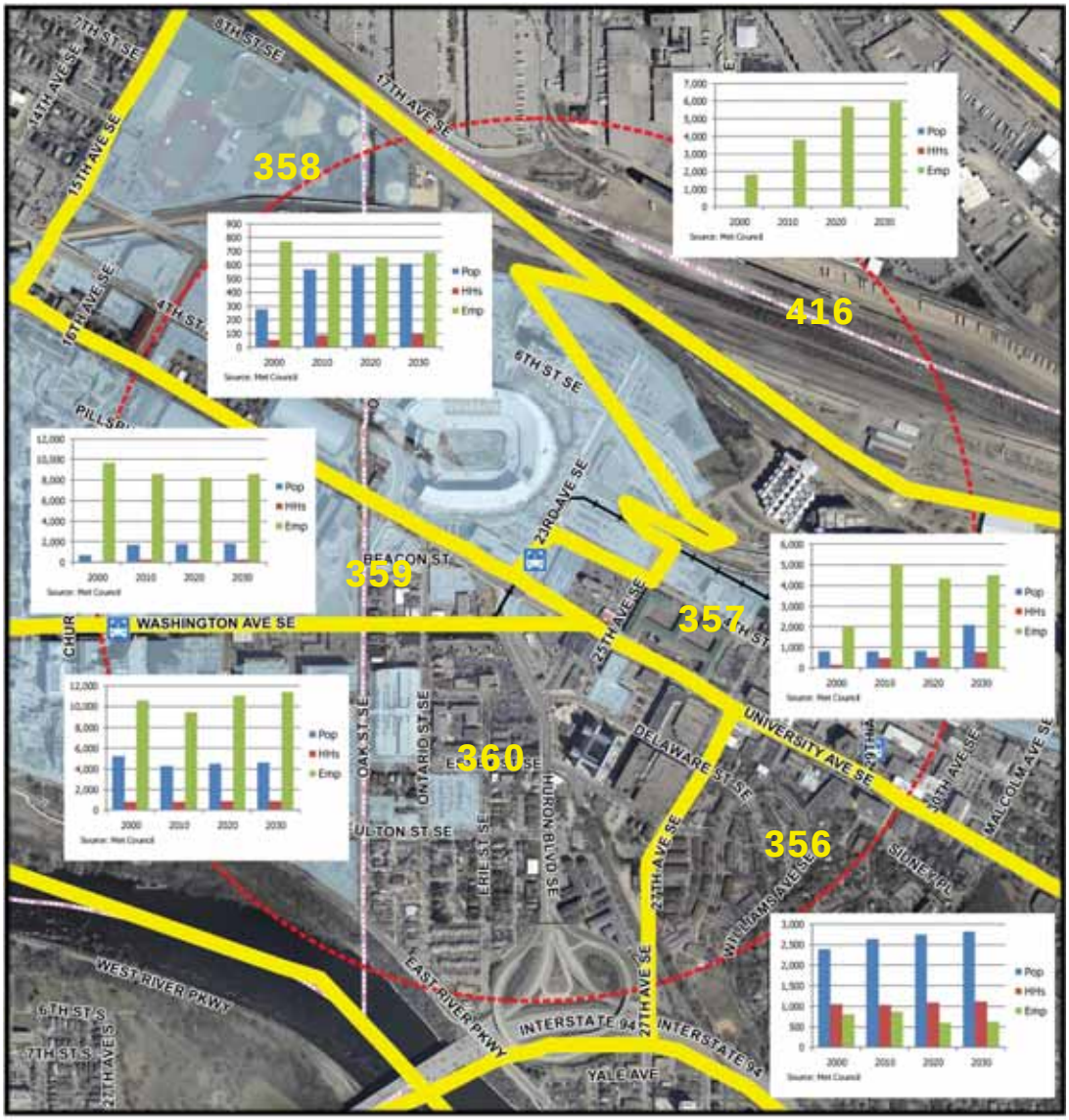
Total expenditures for each spending category were translated into square footages based on the Urban Land Institute's survey of shopping centers, which provides average sales amount per square foot for a variety of different retail store types. The following are the average retail sales per square foot used in this analysis. (Some adjustments were made to account for the fact that the Stadium Village area does not always correspond directly to a typical shopping center format.)

- Food at Home $350/sf
- Food Away from Home $275/sf
- Alcoholic Beverages $325/sf
- Housekeeping Supplies $200/sf
- Household Furnishings $150/sf
- Apparel $225/sf
- Drugs & Medical Supplies $400/sf
- Entertainment (excl fees) $150/sf
- Personal Care Products and Services $300/sf
- Tobacco $1,000/sf

Employee Assumptions

Number of Employees 2010

Employee counts are based on Met Council TAZ figures for districts 357, 358, 359, and 360. Districts 359 and 360 were considered to be entirely within the Stadium Village area. However, TAZ districts 357 and 358 are much more oriented toward the 29th station area. However, their eastern ends are clearly influenced by Stadium Village. Therefore, 20% of the employment figures for 357 and 358 are attributed to Stadium Village. Corroborating these figures are data from the University of Minnesota, which indicates that there are approximately 11,100 full and part-time University of Minnesota employees on the East Bank (excluding student employees).



Metropolitan Council Forecasted Growth by Traffic Analysis Zone (TAZ)

N W E S

800 0 800 Feet

Central Corridor LRT Stations
Central Corridor LRT line
Half Mile from Statium Village Station
Neighborhood Boundary
Taffic Analysis Zone (TAZ) Boundary
University Property

April 26, 2011

Bonestroo

I:\1964\1964110040\GIS\Projects\growth trends.mxd

Number of Employees 2020

Similar to resident figures, we have estimated a low, medium, and high forecast for the number of 2020 employees. Net new employee growth in the Stadium Village area is assumed to come from two primary sources:

1) The proposed U of M Ambulatory Care Center (ACC)
2) Build out of the Bio-Medical Research District north and east of TCF stadium

Although no immediate plans or funding is in place for the ACC, we have assumed it will be operating by 2020. Based on an interview with Russ Williams of the University of Minnesota Medical Center, Fairview, we have assumed the ACC will result in a net growth of 400 employees.

Based on current funding and development trends, the University predicts that as many as 700 new employees may be added through 2020 in the Bio-Medical Research District. Assuming this is an upward limit to the potential growth over the next 10 years, we have adjusted it to reflect a low, medium, and high range of growth as follows:

- Low: 300 new employees
- Medium: 500 new employees
- High: 700 new employees

It should be noted, though, that these employee figures only represent a fraction of the total employment potential in the district at final build-out, which may likely take many years or even decades. According to the East Gateway District Master Plan, the Bio-Medical Research District could have a total build out of anywhere from 2,800,000 to 4,000,000 square feet of laboratory, office, and associated research space. At 500 square feet per worker, this could potentially be as many as 5,600 to 8,000 new employees.

Income

It is assumed that income associated with employees is equal to the 7-County Metro Area average per capita income, which is $42,159. Please note that the University is checking possible data sources on average salaries to better reflect actual per capita incomes in the area.

Consumer Spending

Similar to the resident population, consumer spending by employees is based on the most recent (2008) Consumer Expenditure Survey (CES). However, for employees much of their spending in the Stadium Village area is restricted to certain kinds of goods and services because they spend the majority of their retail and services dollar outside of the Stadium Village area. For example, we have assumed that as much as 30% of an employee's Food Away from Home budget might be spent near their workplace in Stadium Village. Below is the proportion we assumed for each consumer spending category:

- Food at Home 5%
- Food Away from Home 30%
- Alcoholic Beverages 15%
- Housekeeping Supplies 0%
- Household Furnishings 0%
- Apparel 10%
- Drugs & Medical Supplies 20%
- Entertainment (excl fees) 5%
- Personal Care Products and Services 10%
- Tobacco 30%

Seasonality

We assume there is no appreciable seasonality to spending by workers.

Non-Resident Student Assumptions

Number of Non-Resident Students in 2010

According to the University of Minnesota, there are approximately 32,000 students whose primary area of study focuses them on the East Bank campus. However, we need to subtract out those East Bank students more focused toward Dinkytown as well as students who live in the Stadium Village area. Because there is no accurate means to quantify Dinkytown focused students versus Stadium Village focused students, we have simply halved the number to 16,000. Also, there are approximately 7,700 persons living in Tract 1049 between the ages of 18-24. We have assumed that 6,000 of these persons are students, which would live a net non-resident student population focused on Stadium Village at 10,000.

Number of Non-Residents Students in 2020

According to the University of Minnesota, enrollment is projected to remain flat into the foreseeable future. Therefore, we have estimated that the number of non-residents students who regularly visit Stadium Village to remain unchanged in 2020.

Income

It is assumed that the per capita income of non-resident students is the same as resident students.

Consumer Spending

For non-resident students the proportion of spending by category is assumed as follows (please see Employee Assumptions for additional explanation):

- Food at Home 5%
- Food Away from Home 25%
- Alcoholic Beverages 10%
- Housekeeping Supplies 0%
- Household Furnishings 0%
- Apparel 10%
- Drugs & Medical Supplies 20%
- Entertainment (excl fees) 20%
- Personal Care Products and Services 10%
- Tobacco 20%

Seasonality

Similar to students who live in the area, we've also tried to account for the impact of the seasonal school schedule on spending. Therefore, we have modified the overall spending potential of non-resident students downward by 25% to reflect the standard nine month school year.

Visitor Assumptions

Number of Visitors in 2010

Visitors consist of persons going to the University of Minnesota medical facilities, attendees of sporting events and other cultural attractions, as well as persons conducting routine business with the University. Given the capacities of the sporting and cultural venues on campus and the frequency of events, visitorship has the potential to approach 1,000,000 persons per year or about 3,000 visitors per day averaged across an entire year. The University's medical facilities account for another 2,000 visitors per day. And, finally, we estimate that another 1,000 visitors are due to any number of reasons. This is based on University findings that suggest there are 80,000 persons who travel to the campus on a typical day. Therefore, after accounting for students, faculty, staff, and visitors of the medical facilities, we arrived at 1,000 additional visitors.

Number of Visitors in 2020

We have assumed that visitorship related to existing facilities will remain constant through 2020. However, two new activities in the Stadium Village area will increase visitorship. First, the ACC will increase visitorship by 300 persons per day. Second, the LRT will also allow new visitors to come to the Stadium Village area, and these are estimated as follows:

- Low: 500 per day
- Medium: 1,000 per day
- High: 1,500 per day

Income

It is assumed that income associated with visitors is equal to the 7-County Metro Area average per capita income, which is $42,159.

Expenditures

For visitors the proportion of spending by category is assumed as follows (please see Employee Assumptions for additional explanation):

- Food at Home 0%
- Food Away from Home 50%
- Alcoholic Beverages 0%
- Housekeeping Supplies 0%
- Household Furnishings 0%
- Apparel 5%
- Drugs & Medical Supplies 5%
- Entertainment (excl fees) 5%
- Personal Care Products and Services 2%
- Tobacco 1%

Glossary of Terms

Food at home: refers to the total expenditures for food at grocery stores (or other food stores) and food prepared by the consumer unit on trips. It excludes the purchase of nonfood items.

Food away from home: includes all meals (breakfast and brunch, lunch, dinner and snacks and nonalcoholic beverages) including tips at fast food, take-out, delivery, concession stands, buffet and cafeteria, at full-service restaurants, and at vending machines and mobile vendors. Also included are board (including at school), meals as pay, special catered affairs, such as weddings, bar mitzvahs, and confirmations, school lunches, and meals away from home on trips.

Alcoholic beverages: refers to off-sale liquor purchases as opposed to liquor purchases made in bars and restaurants.

Housekeeping supplies: includes laundry and cleaning supplies, cleaning and toilet tissues, stationery supplies, postage, delivery services, miscellaneous household products, and lawn and garden supplies.

Household furnishings: includes textiles, furniture, floor coverings, major appliances, small appliances, and miscellaneous household equipment, such as luggage, lamps, light fixtures, window coverings, clocks, hand and power tools, telephones and accessories, computers and computer hardware for home use, computer software and accessories for home use, calculators, business equipment for home use, floral arrangements and house plants, closet and storage items, other household decorative items, outdoor equipment, smoke alarms, and other small miscellaneous furnishings.

Apparel: includes coats, jackets, clothing, jewelry and footware.

Drugs and medical supplies: includes nonprescription and prescription drugs, vitamins, topicals and dressings, antiseptics, bandages, cotton, first aid kits, contraceptives, syringes, ice bags, thermometers, sun lamps, vaporizers, heating pads, medical appliances (such as braces, canes, crutches, walkers, eyeglasses, and hearing aids), and rental and repair of medical equipment.

Personal care products and services: includes products for the hair, oral hygiene products, shaving needs, cosmetics and bath products, electric personal care appliances, other personal care products, and personal care services for males and females.

Entertainment (excluding fees): includes television, radio, other miscellaneous sound equipment, pets, toys, hobbies, playground equipment, and other entertainment equipment and services, such as indoor exercise equipment, bicycles, trailers, purchase and rental of motorized campers and other recreational vehicles, camping equipment, hunting and fishing equipment, sports equipment (winter, water, and other), boats, boat motors and boat trailers, rental of boats, landing and docking fees, rental and repair of sports equipment, photographic equipment and supplies (film and film processing), photographer fees, repair and rental of photo equipment, fireworks, and pinball and electronic video games.

Tobacco: includes cigarettes, cigars, snuff, loose smoking tobacco, chewing tobacco, and smoking accessories (such as cigarette or cigar holders, pipes, flints, lighters, and pipe cleaners).

TAZ (Traffic Analysis Zone): a geographic area defined for purposes of transportation planning. It is a unit of geography that is used to measure households and employment in order to determine likely trip generations.