

WHAT IS THE NORTH END VISION PLAN?

The North End Vision Plan is a shared community vision that addresses:

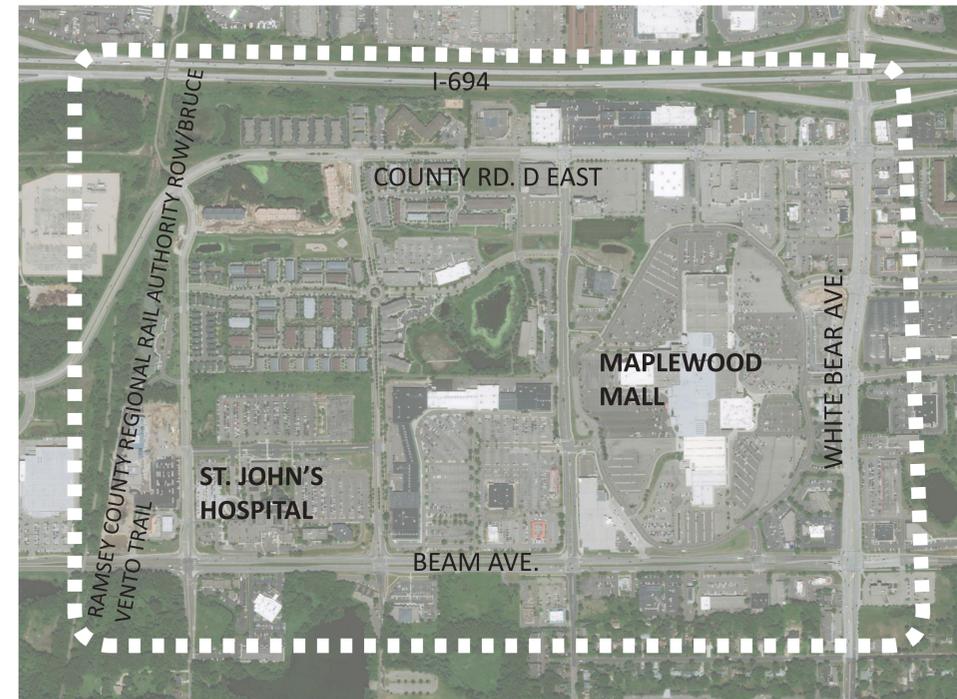
- Short- and long-term opportunities for new development
- New or improved connections between land uses and transit facilities (i.e., Rush Line BRT)
- New or improved public spaces
- Priorities for new investment

What is it for?

- Build on previous plans
- Coordinate with planning of the Rush Line BRT
- Explore new ideas for improving the North End
- Guide the design and location of future planned investments (e.g., road reconstruction, new trails, new development, etc.)
- Help secure project funds
- Create community

How to get involved...

The entire process will employ a very inclusive community engagement effort and we would love for you to participate and be involved. Please make sure to visit the project website for any project announcements and to submit comments at: [insert link to Social PinPoint site].



INTRODUCTION TO THE NORTH END VISION PLAN

MAPLEWOOD NORTH END VISION PLAN

PERKINS+WILL 08/21/2018

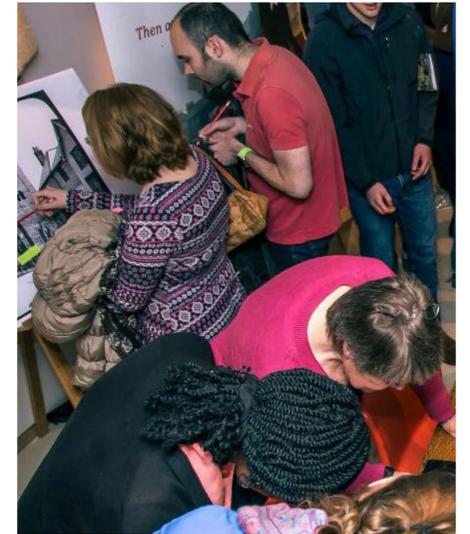
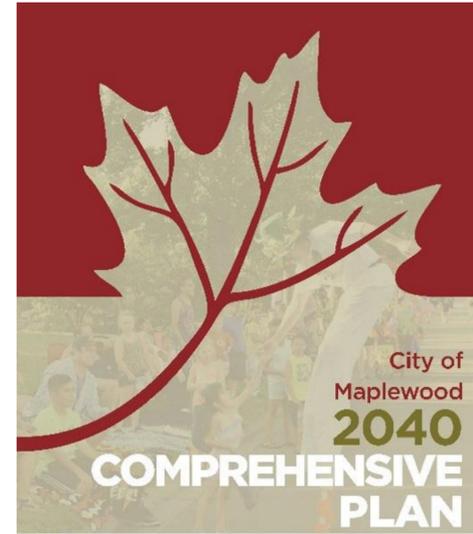
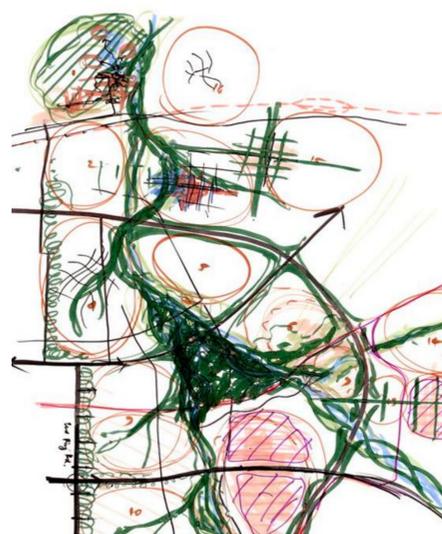
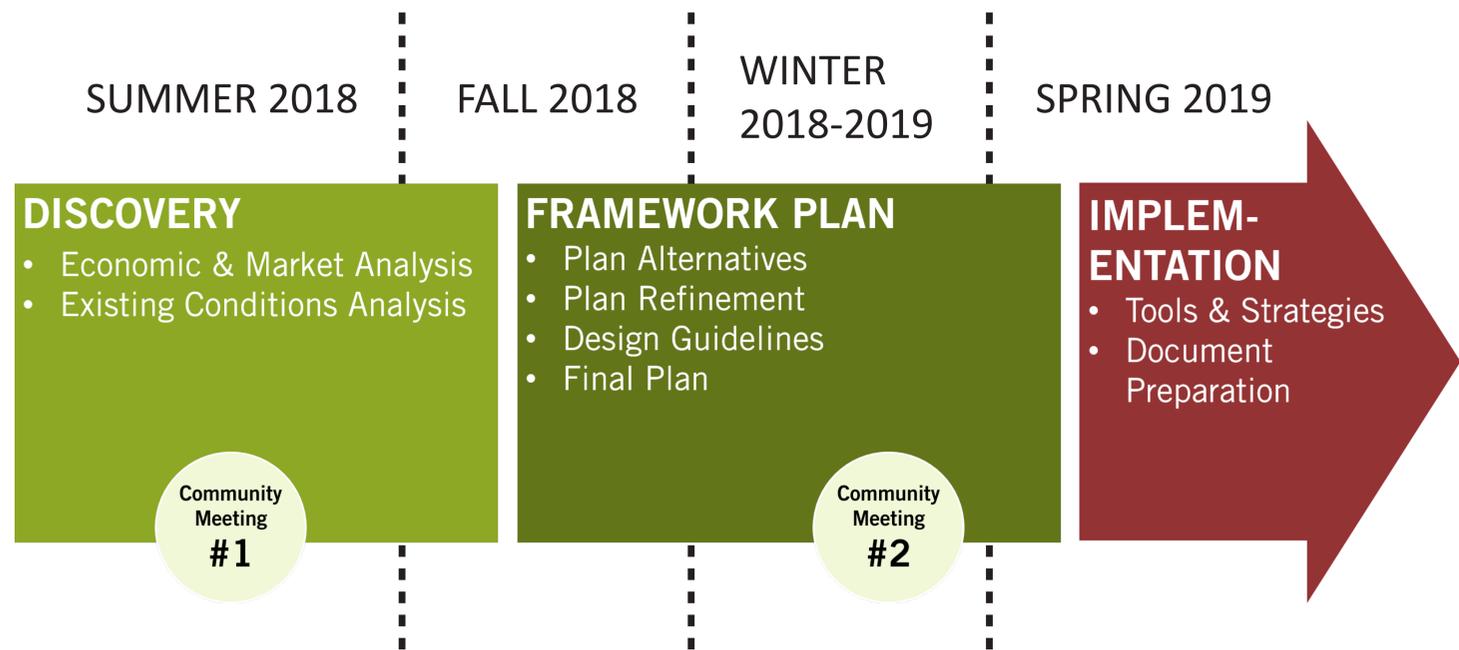
HOW IS THE VISION PLAN PREPARED?

The North End Vision Plan will follow a multiphase process guided by working group made up of stakeholders and other concerned citizens. At every step in the process, the public will be able to weigh in on the plan.

Project Steps:

1. Understand where we are today
2. Build on previous work
3. Gather input
4. Test ideas for change
5. Refine ideas to align with community goals and objectives
6. Create an action plan

PROJECT SCHEDULE



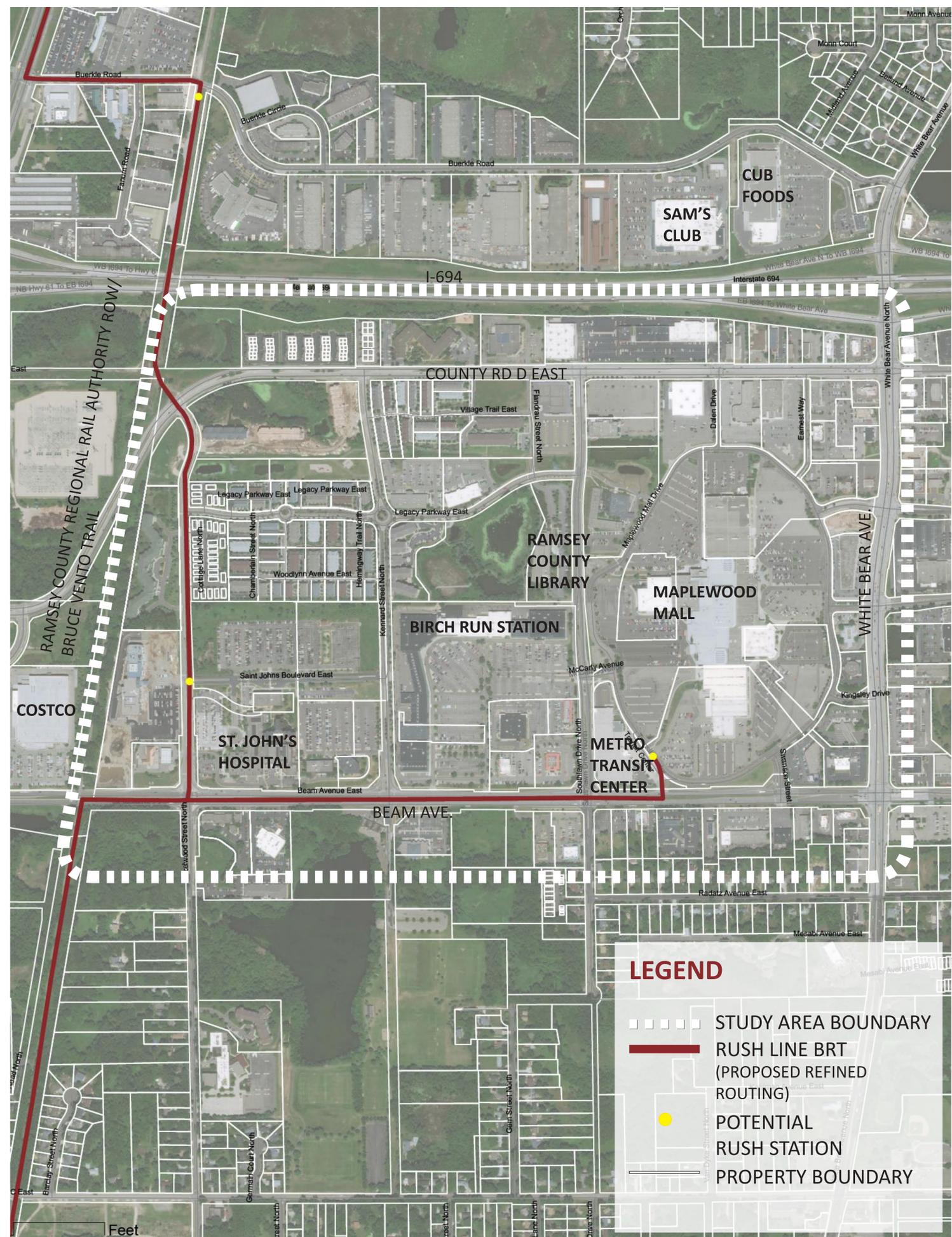
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MAPLEWOOD NORTH END VISION PLAN

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STUDY AREA CHARACTERISTICS

- **400 Acres**
- **1.6 Million Sq. Ft. Retail Space** (another 800,000 Sq. Ft. within 1/4 Mile of Study Area)
- **750,000 Sq. Ft. Healthcare Space** (another 130,000 Sq. Ft. within 1/4 Mile of Study Area)
- **Approximately 1,000 Households**
- **5,000 Jobs** (Another 3,200 Jobs within 1/2 Mile of Study Area)
- **Ramsey County Library**
- **Ramsey County Regional Rail Authority ROW/Bruce Vento Trail**



NORTH END STUDY AREA CHARACTERISTICS

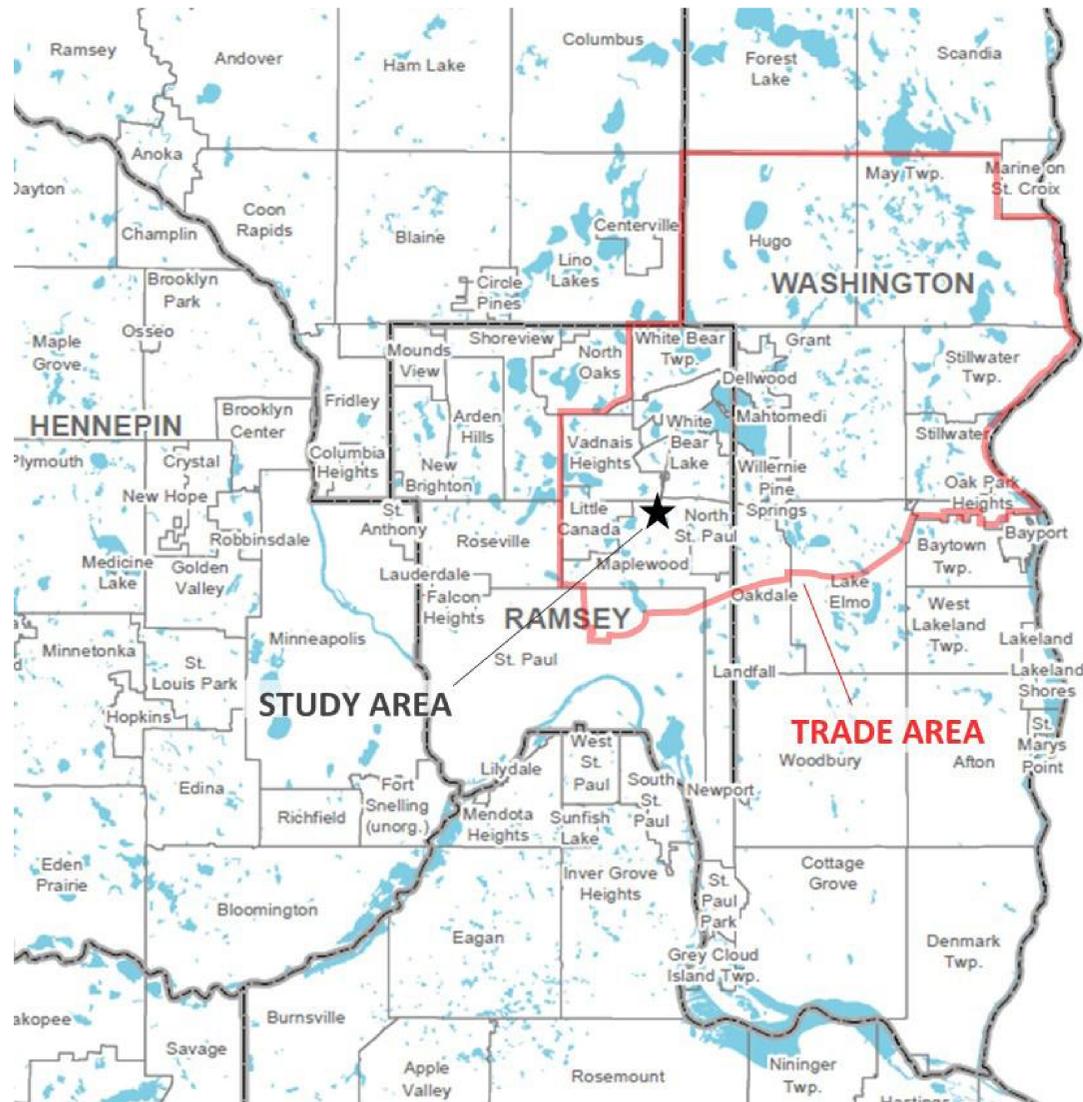
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SOCIO-ECONOMICS

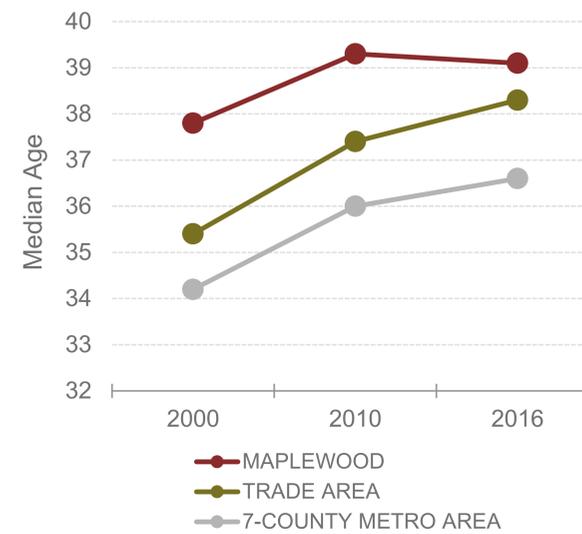
As a major retail and employment district, the North End provides goods and services that meet the needs of people living and working throughout the northeast metro area. Future growth in this part of the metro area will fuel demand for more housing, office space, and new forms of retail. At the same time important demographic trends will influence the type of housing needed and the amount and location of new retail and office development. Of particular note will be the increase in older adults (and similar increases in younger families) and the continued divergence of incomes between age groups. Recent trends indicate that the median income of those under age 45 are not keeping pace with previous generations and those over age 65 are more affluent compared to previous generations.



TRADE AREA FORECASTED GROWTH

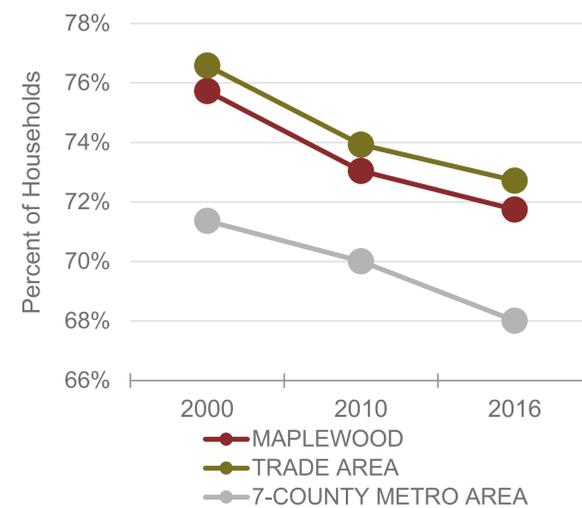
2016 Population = 221,000	2016 Households = 83,000
2040 Population = 253,000	2040 Households = 105,000
Change '16-'40 = +32,000	Change '16-'40 = +22,000
Percent Change = 15%	Percent Change = 26%
Maplewood Chg. = 28%	Maplewood Chg. = 34%
Metro Area Chg. = 25%	Metro Area Chg. = 33%

MEDIAN AGE



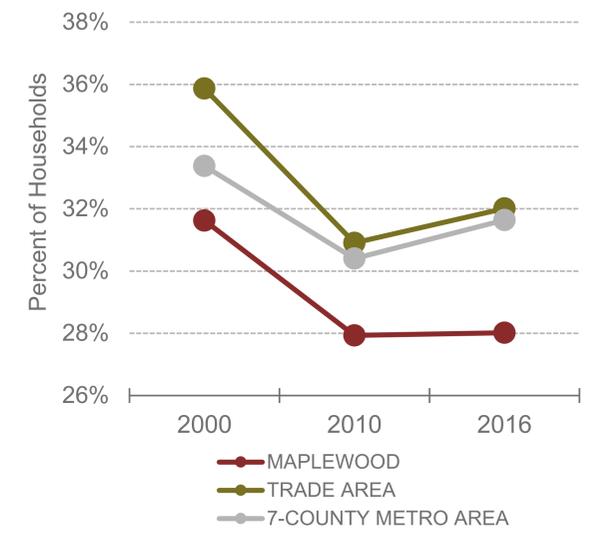
Sources: US Census; Perkins+Will

HOMEOWNERSHIP



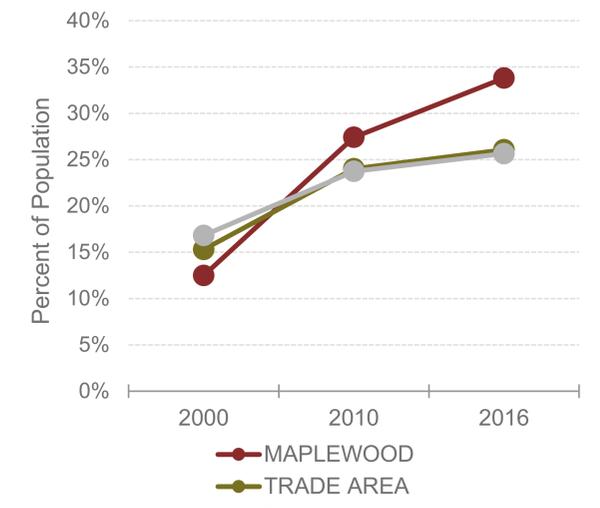
Source: US Census

HOUSEHOLDS WITH CHILDREN



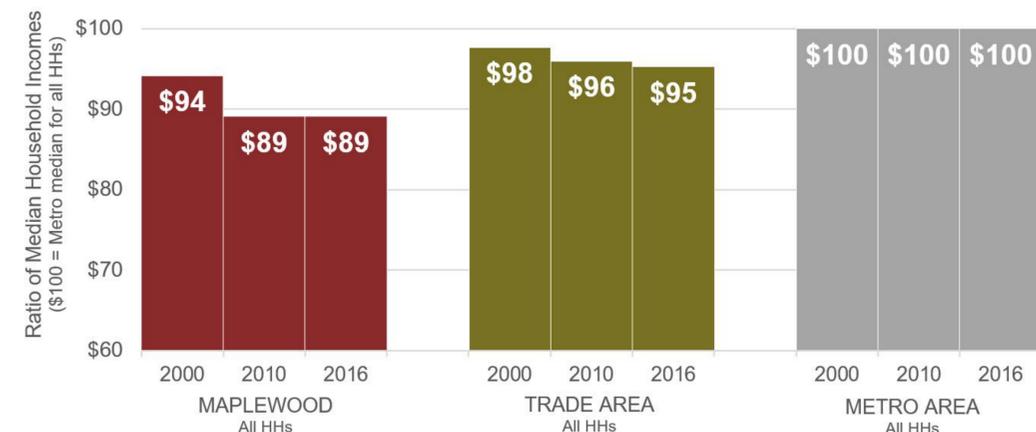
Source: US Census

PERSONS OF COLOR



Source: US Census

CHANGE IN INCOME RELATIVE TO METRO AREA



Sources: US Census; Perkins+Will



MARKET RESEARCH FINDINGS: SOCIO-ECONOMICS

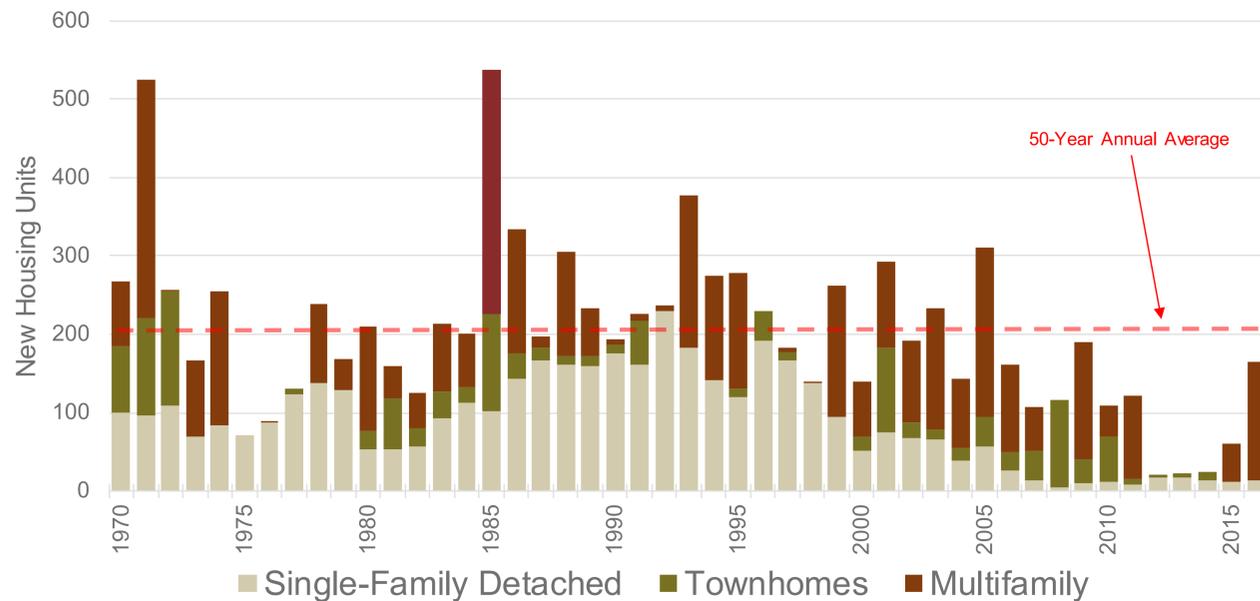
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HOUSING MARKET

The housing market is extremely strong. Vacancies have been dropping and rents/prices have been rising rapidly. This has increased demand for new housing development in the North End (e.g., Conifer Ridge Apartments). Nevertheless, construction of new housing lags well behind historic construction rates. Moreover, the strong market, in the absence of significant new supply, has meant that many households with fixed- or low-incomes are struggling to find housing they can afford. Long-range demographic trends point to future demand for more senior housing and housing for families with children.

MAPLEWOOD RESIDENTIAL DEVELOPMENT BY STRUCTURE TYPE



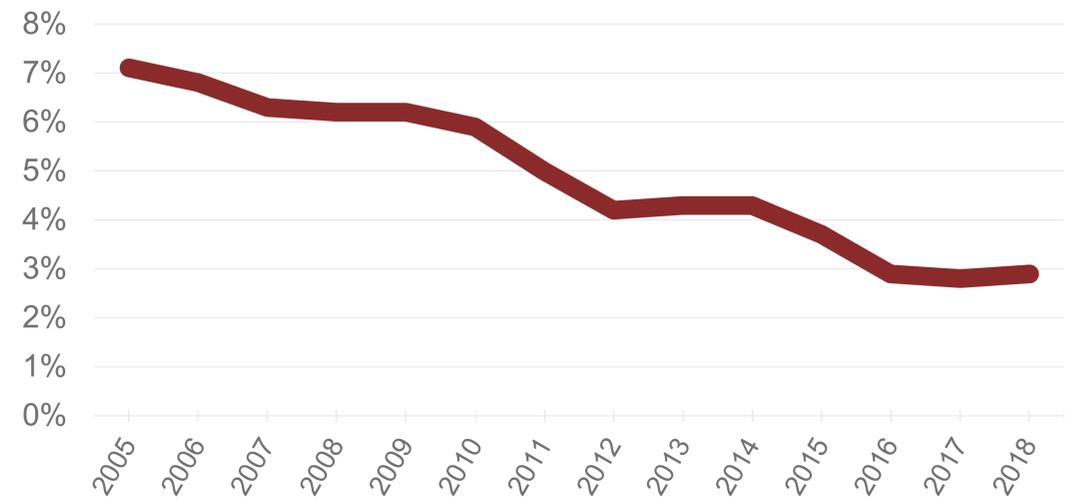
Source: Metropolitan Council

METRO AREA RESIDENTIAL DEVELOPMENT BY STRUCTURE TYPE



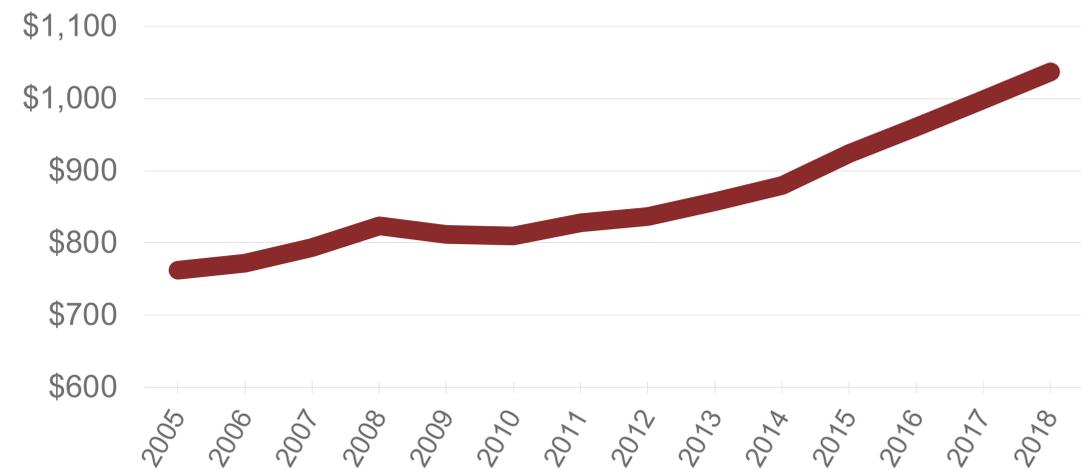
Source: Metropolitan Council

APARTMENT VACANCY RATE: NORTHEAST METRO



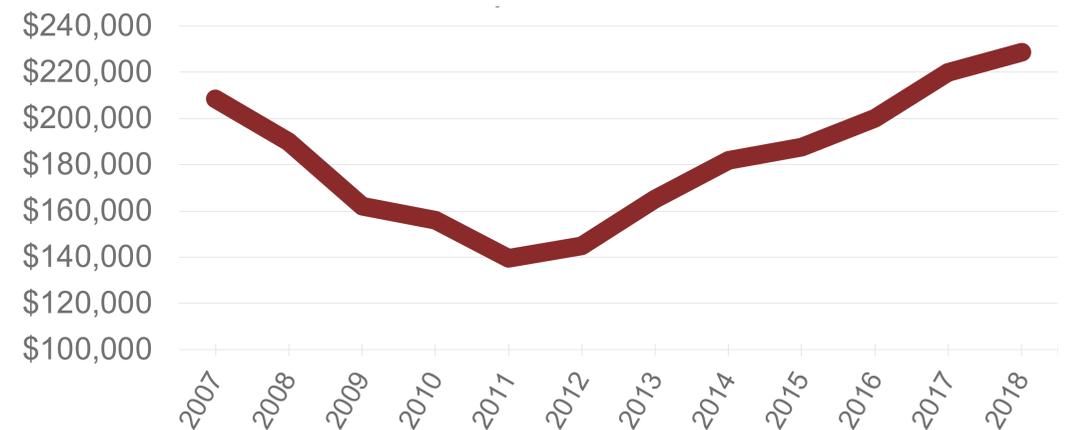
Source: CoStar; Perkins+Will

AVERAGE MONTHLY RENT: NORTHEAST METRO



Source: CoStar; Perkins+Will

MEDIAN HOME SALES PRICE: MAPLEWOOD



Source: St. Paul Area Association of Realtors; Perkins+Will



MARKET RESEARCH FINDINGS: HOUSING MARKET

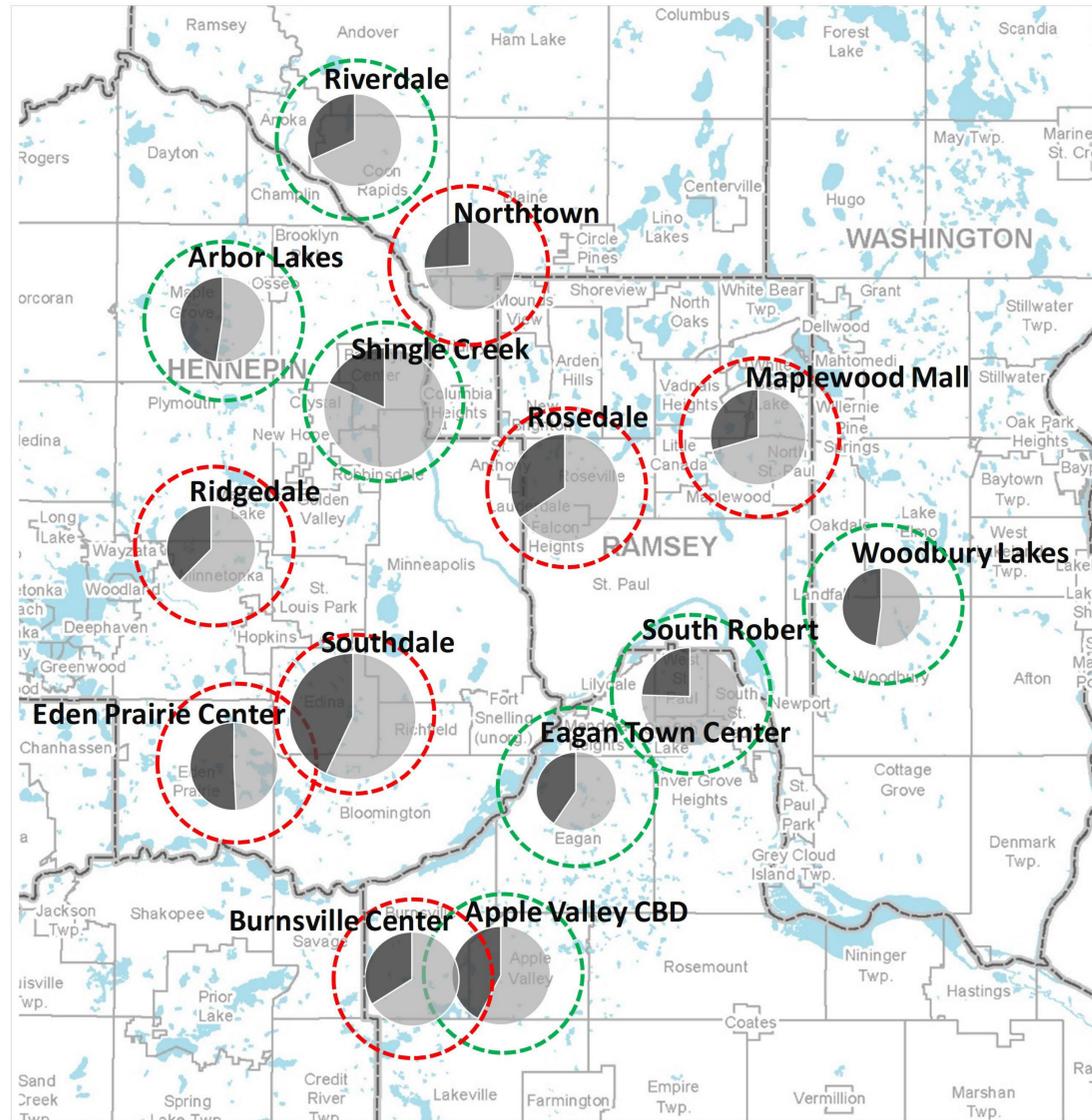
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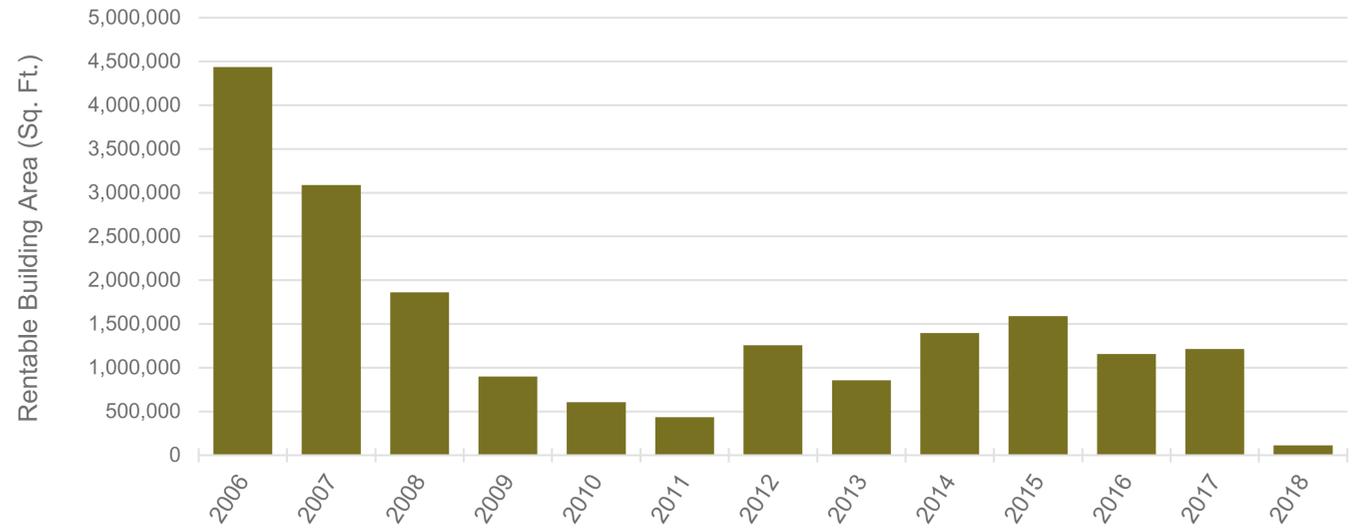
RETAIL MARKET

The North End is a major retail district. However, the retail market is rapidly evolving. Traditional department stores and other large-format retailers are losing market share to on-line retailers. However, locations with a mix of activities and a greater focus on creating an experience for visitors continue to be attractive, especially for newer retail concepts (e.g., group fitness and pet-friendly stores). In order to remain vibrant, many retail areas are shrinking or 'right-sizing' their overall retail space and replacing it with housing and other uses that support greater levels of overall activity.

COMPETITIVE REGIONAL SHOPPING DISTRICTS

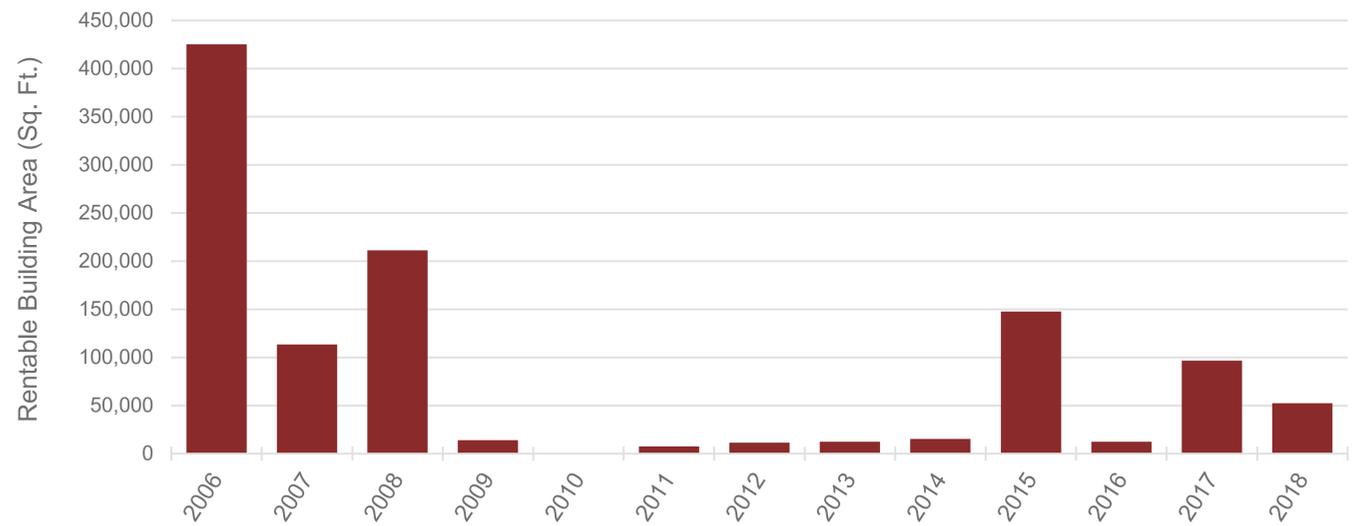


METRO AREA RETAIL CONSTRUCTION



Sources: CoStar; Perkins+Will

COMPETITIVE REGIONAL SHOPPING DISTRICTS



Sources: CoStar; Perkins+Will

ONLINE-RETAIL

Now accounts for **9.5%** of all retail sales, which is up from **4%** in 2009

Source: US Census: E-Stats, E-Commerce Multi-Sector Report



MARKET RESEARCH FINDINGS: RETAIL MARKET

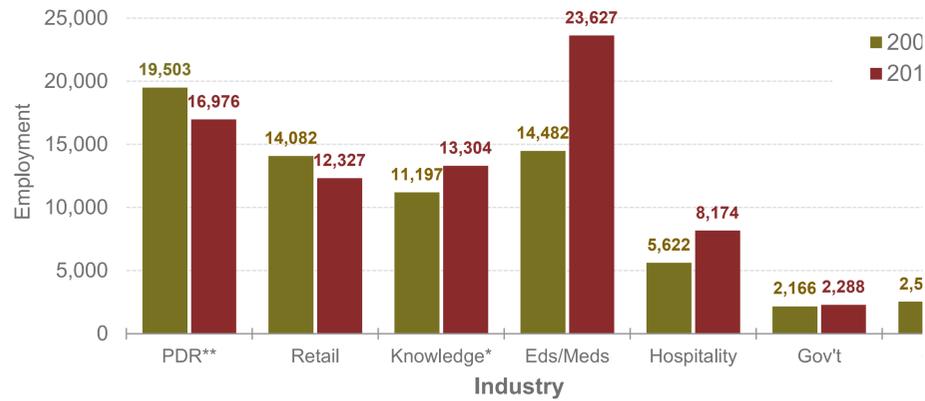
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OFFICE MARKET

The size of the traditional office market in the North End is modest since the area has not historically been a location for headquarters and other large office users. However, St. John's Hospital anchors a medical district in which medical office space is a major component. New medical office development within the past year will satisfy short-term demand for space, but the forecasted growth in the healthcare sector means that additional medical office space will be needed.

METRO AREA FORECASTED EMPLOYMENT GROWTH BY OCCUPATION

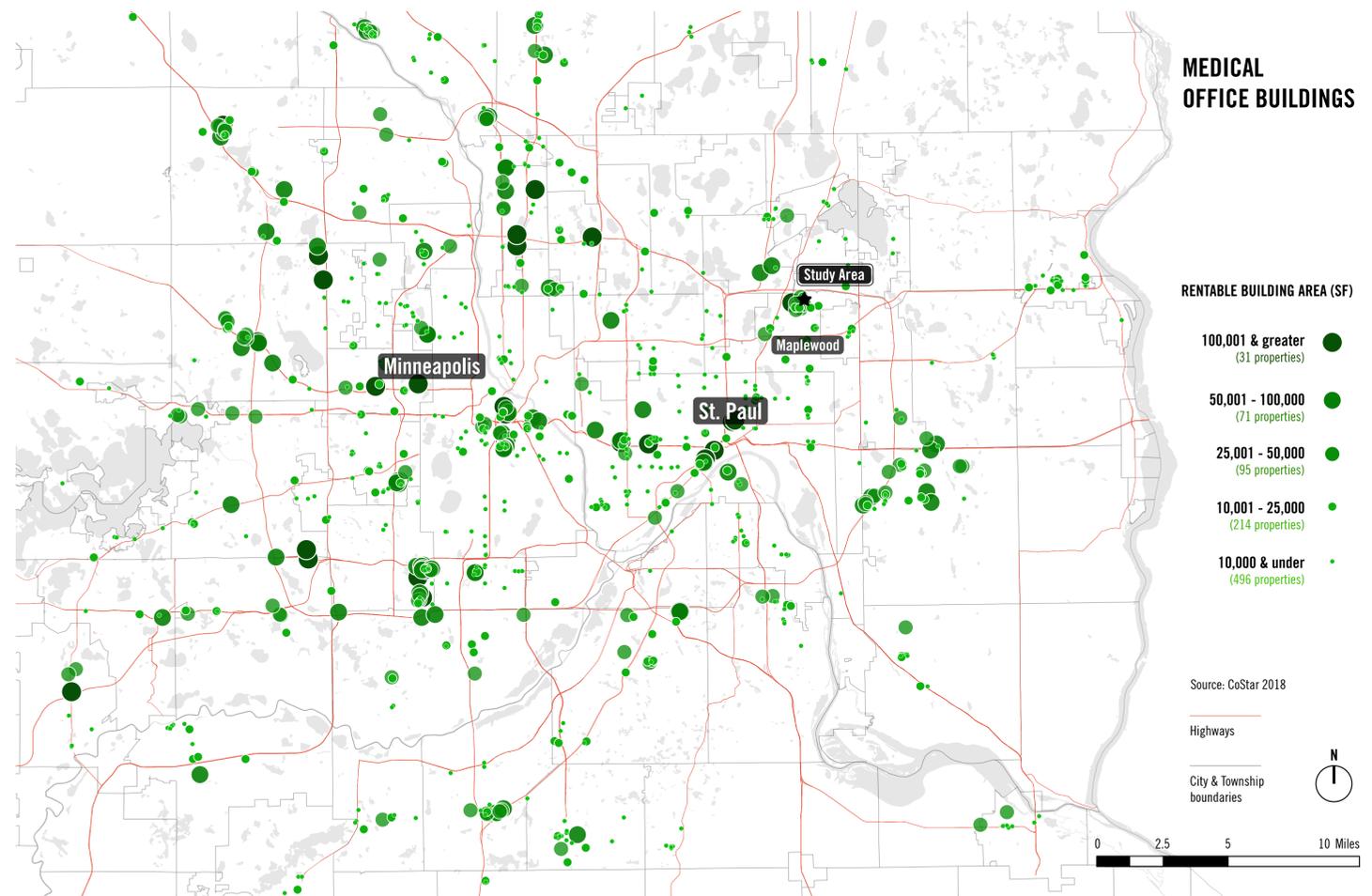
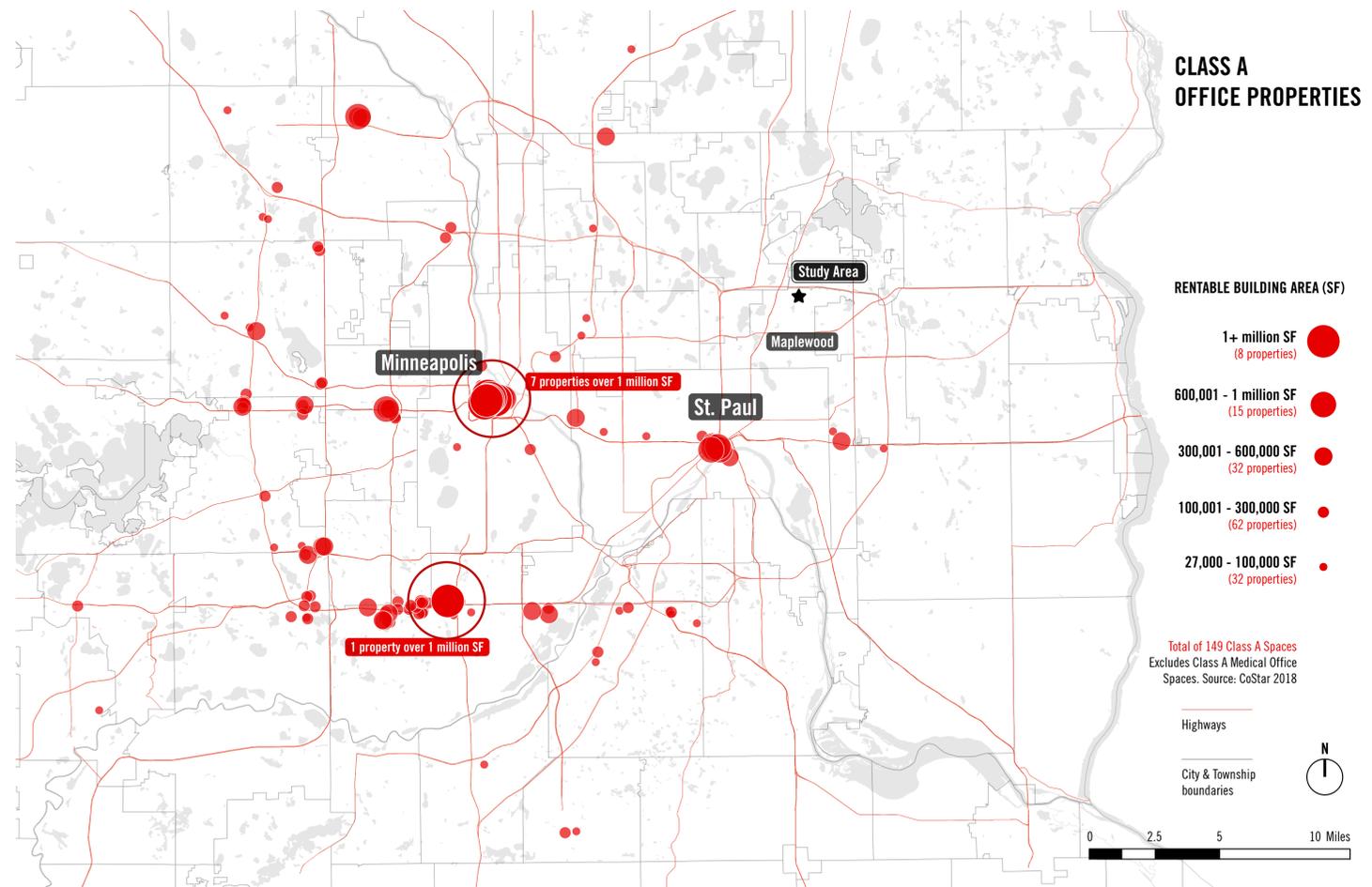


* Knowledge = Consists of "knowledge-based" industry sectors, such as Information, Finance, and Professional Services/Management
 ** PDR = Production, Distribution, and Repair industry sectors (i.e., Manufacturing, Construction, Transportation, Utilities, etc.)

EMPLOYMENT BY INDUSTRY SECTOR NORTHEAST METRO

Occupation Category	2014	2024	# Change	% Change
Business and Financial Operations	131,219	138,652	7,433	5.7%
Computer and Mathematical	76,749	83,663	6,914	9.0%
Management	128,324	134,030	5,706	4.4%
Education, Training, and Library	92,089	95,438	3,349	3.6%
Community and Social Service	33,736	36,966	3,230	9.6%
Legal	16,211	17,173	962	5.9%
Life, Physical, and Social Science	17,035	17,838	803	4.7%
Architecture and Engineering	37,780	38,088	308	0.8%
Office and Administrative Support	271,644	268,364	-3,280	-1.2%
Office Occupations	804,787	830,212	25,425	3.2%
Personal Care and Service	97,232	111,052	13,820	14.2%
Healthcare Practitioners and Technical	90,427	102,741	12,314	13.6%
Healthcare Support	48,132	57,233	9,101	18.9%
Medical/Healthcare Service Occupations	235,791	271,026	35,235	14.9%
Food Preparation and Serving Related	134,928	143,260	8,332	6.2%
Sales and Related	179,497	184,863	5,366	3.0%
Construction and Extraction	58,530	62,833	4,303	7.4%
Building and Grounds Cleaning and Maintenance	57,011	59,147	2,136	3.7%
Installation, Maintenance, and Repair	55,441	56,777	1,336	2.4%
Transportation and Material Moving	98,196	99,145	949	1.0%
Protective Service	29,287	30,014	727	2.5%
Arts, Design, Entertainment, Sports, and Media	36,267	36,750	483	1.3%
Farming, Fishing, and Forestry	2,686	2,294	-392	-14.6%
Production	116,888	112,919	-3,969	-3.4%
Non-Office and Non-Medical	768,731	788,002	19,271	2.5%
Total, All Occupations	1,809,309	1,889,240	79,931	4.4%

Source: Minnesota Department of Employment and Economic Development



MARKET RESEARCH FINDINGS: OFFICE MARKET

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LEGEND

-  STUDY AREA BOUNDARY
-  RUSH LINE BRT
(PROPOSED REFINED ROUTING)
-  POTENTIAL RUSH STATION
-  PROPERTY BOUNDARY



MAPPING EXERCISE

MAPLEWOOD NORTH END VISION PLAN

