2 DEMOGRAPHIC AND EMPLOYMENT CHARACTERISTICS OF STUDY AREA

INTRODUCTION

An understanding of the distribution and density of population and employment is an integral part of the transportation planning process. Demographics such as population, employment, age distribution, and travel behavior all tell a story about the complex travel needs of residents and employees, especially as they relate to the use of potential new transportation alternatives.

The presentation of relevant data in this chapter is based largely on a series of maps and tables that show regional population characteristics, including those with a higher propensity to use public transit or consider an alternative commute mode. The factors help identify a typical commuter in Central Minnesota as an individual who is relatively young (from county to county, about 30 to 40% of the population is in the age 18-44 category), lives in mostly suburban residential developments at the southern end of District 3 where there is some access to regional transit services, has an automobile, and a median household income of more than $48,000 per year.

Although numerous factors influence the demand for public transit, research shows that the density of people, jobs and services are the best three indicators of transit demand. Commuter programs and transportation demand management (TDM) programs can also be most effectively implemented in areas with high concentrations of people, jobs and services, while some programs, such as volunteer driver programs and some regional vanpools can be successful in areas with more dispersed trip ends (at least on one end). This chapter focuses on these indicators and others to provide a profile of demographics and land use in Central Minnesota.

For the purposes of this study, the analysis focuses on commute markets in particular: employment commute markets and college/university trips. However, other markets such as seniors and people with disabilities may have demand for regional travel, so it is important to consider all of the potential regional mobility needs when assessing future service alternatives.

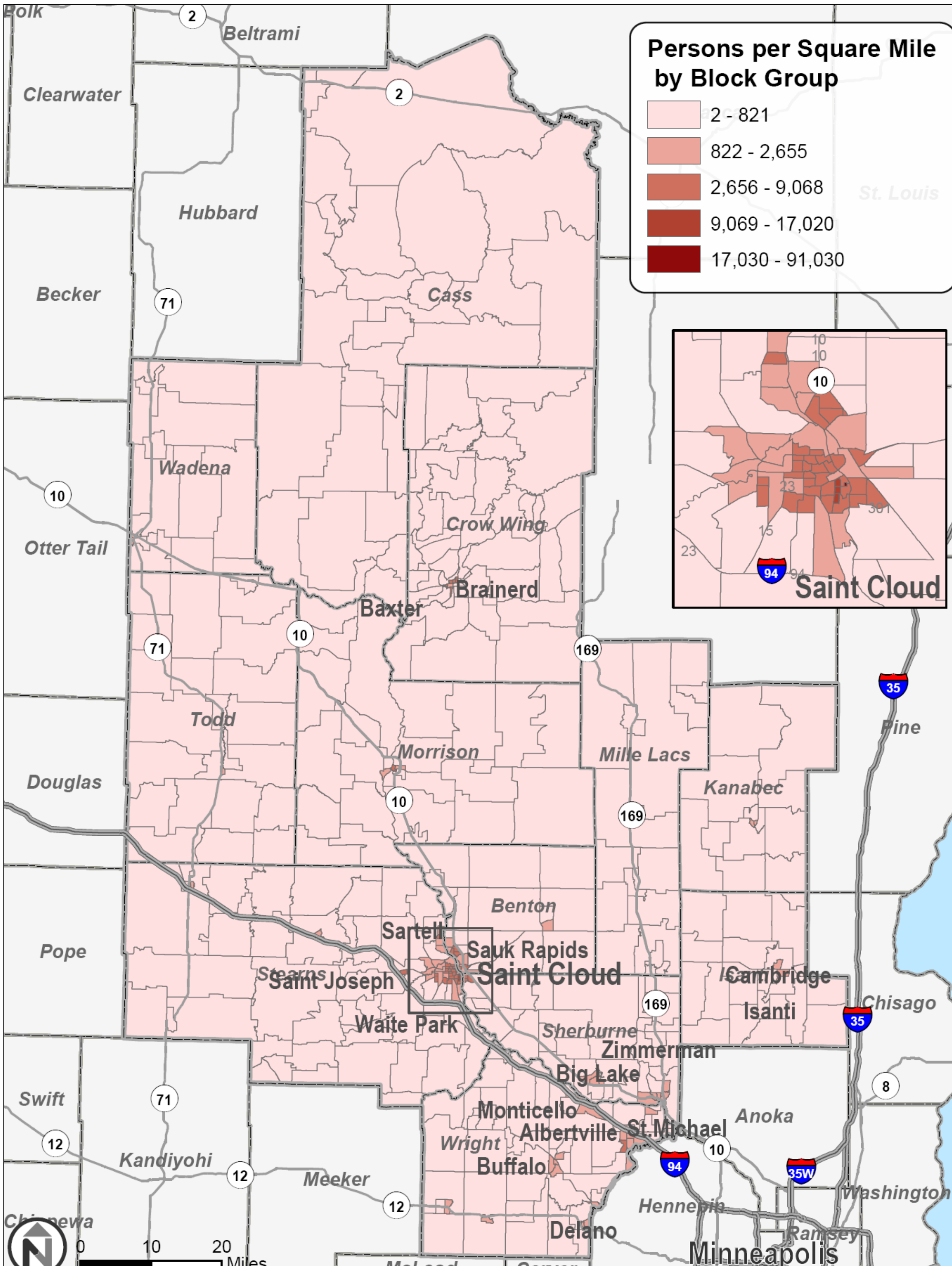
REGIONAL POPULATION CHARACTERISTICS

Population Density and Growth

As the Twin Cities region has grown in the last two decades, growth from the metropolitan region has spread outward into District 3. Rapid population growth occurred in suburban areas, as well as in established cities such as St. Cloud. As shown in Figure 2-1, population density is relatively sparse in many counties, especially those further away from Minneapolis. The highest population densities in the region are in downtown St. Cloud, with other pockets of density in the Brainerd-

Baxter area and Cambridge, as well as many of the outer ring suburbs of Minneapolis – Big Lake, Albertville, and Buffalo.

Figure 2-1 Population Density in District 3



Source:2010 US Census, Nelson\Nygaard

Since 2000, the population in District 3 has grown considerably faster than the rest of the state and nation, with a total growth rate of nearly 29%. Sherburne County, in particular, grew very fast, with a nearly 58% increase in population in the last ten years. Wright County's population grew by over 50%, and Isanti County by 44%. With the exception of Todd and Wadena Counties, all other counties in the district have seen rapid population expansion, with growth rates well above the state average.

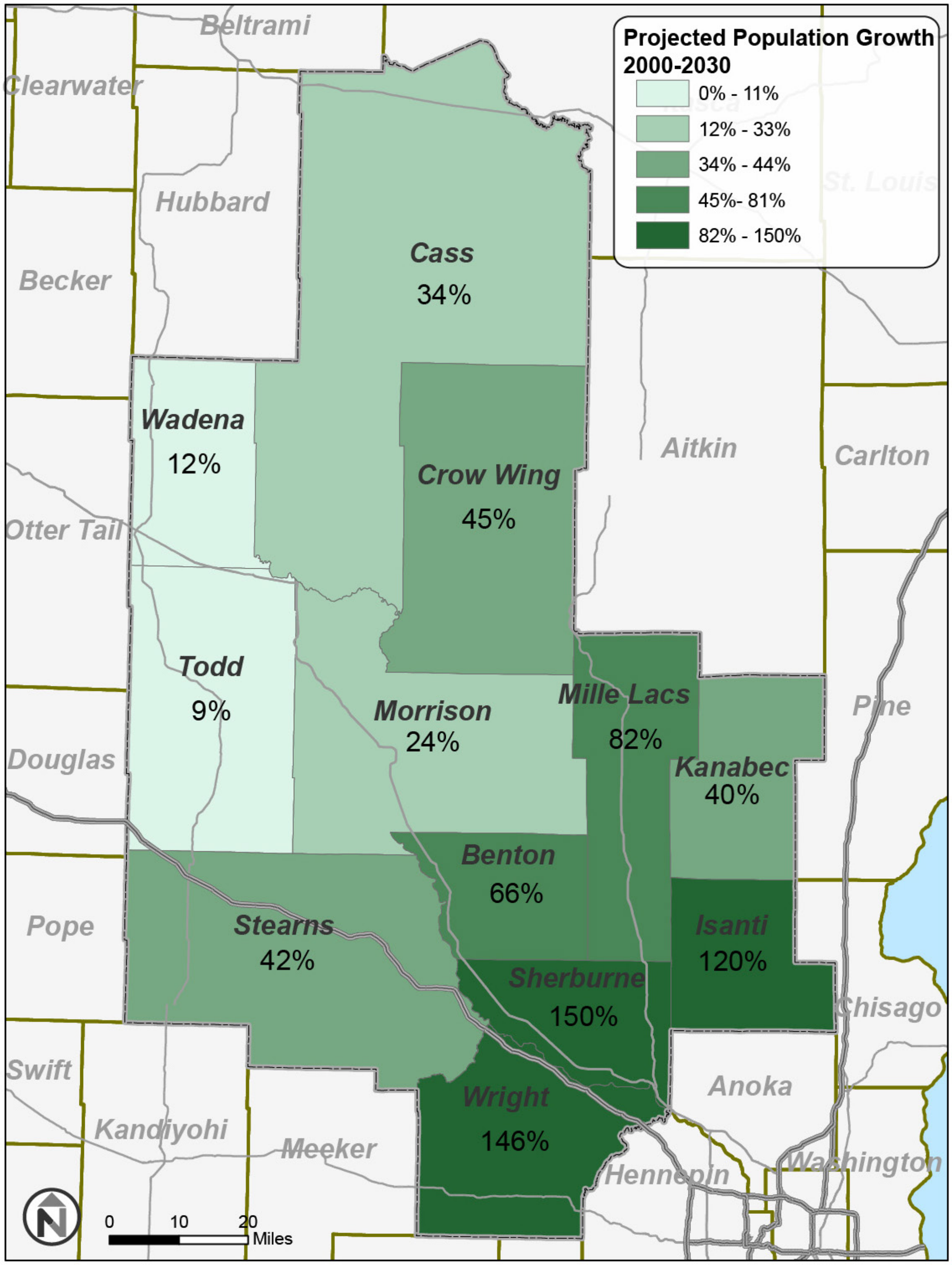
Looking ahead to 2030, Sherburne, Wright, and Isanti Counties are expected to continue to be the fastest growing counties in District 3. The overall population of the district is projected to increase by over 75% by 2030. (See Figures 2-2 and 2-3 for projected population growth in the study area).

Figure 2-2 Rates of Projected Population Growth by County

County	2000	2010	% Increase	2020	% Increase	2030	% Increase	2000-2030
Benton	34,226	43,730	27.8%	51,490	17.7%	56,970	10.6%	66.5%
Cass	27,150	31,040	14.3%	34,500	11.1%	36,250	5.1%	33.5%
Crow Wing	55,099	65,220	18.4%	73,960	13.4%	79,750	7.8%	44.7%
Isanti	31,287	45,080	44.1%	57,710	28.0%	68,770	19.2%	119.8%
Kanabec	14,996	17,560	17.1%	19,710	12.2%	20,970	6.4%	39.8%
Mille Lacs	22,330	29,620	32.6%	35,970	21.4%	40,630	13.0%	82.0%
Morrison	31,712	34,480	8.7%	37,370	8.4%	39,450	5.6%	24.4%
Sherburne	64,417	101,560	57.7%	134,390	32.3%	161,990	20.5%	151.5%
Stearns	133,166	154,220	15.8%	173,520	12.5%	188,760	8.8%	41.7%
Todd	24,426	25,200	3.2%	26,230	4.1%	26,630	1.5%	9.0%
Wadena	13,713	14,110	2.9%	14,830	5.1%	15,300	3.2%	11.6%
Wright	89,986	136,110	51.3%	181,240	33.2%	221,480	22.2%	146.1%
District 3 Total	**542,508**	**697,930**	**28.6%**	**840,920**	**20.5%**	**956,950**	**13.8%**	**76.4%**
Minnesota	**4,919,479**	**5,446,690**	**11%**	**5,943,230**	**9%**	**6,297,960**	**6%**	**28%**

Source: Minnesota State Demographer

Figure 2-3 Projected Population Growth 2000-2030



Data Sources: Minnesota State Demographer

Population Characteristics

Figure 2-4 shows the populations of each county by age group and highlights groups that differ significantly from the regional or state average. Older adults and youth under 18 are typically more likely to use transit services, especially if they are unable to drive. This study examines not only potential transit riders, but the subgroup of commuters, who generally fall between the ages of 18 to 65. Benton, Sherburne, and Stearns Counties all have higher-than-average populations of this age range.

Of particular note are the high percentages of adults age 65 and over in Cass, Crow Wing, Kanabec, Mille Lacs, Morrison, Todd, and Wadena Counties. Wright and Sherburne Counties generally have a younger population, with higher-than-average levels of the youngest age groups, and lower-than-average number of older adults. These statistics may have a slight effect on levels of commuting, if these older adults are retired or if the young populations are already part of the workforce.

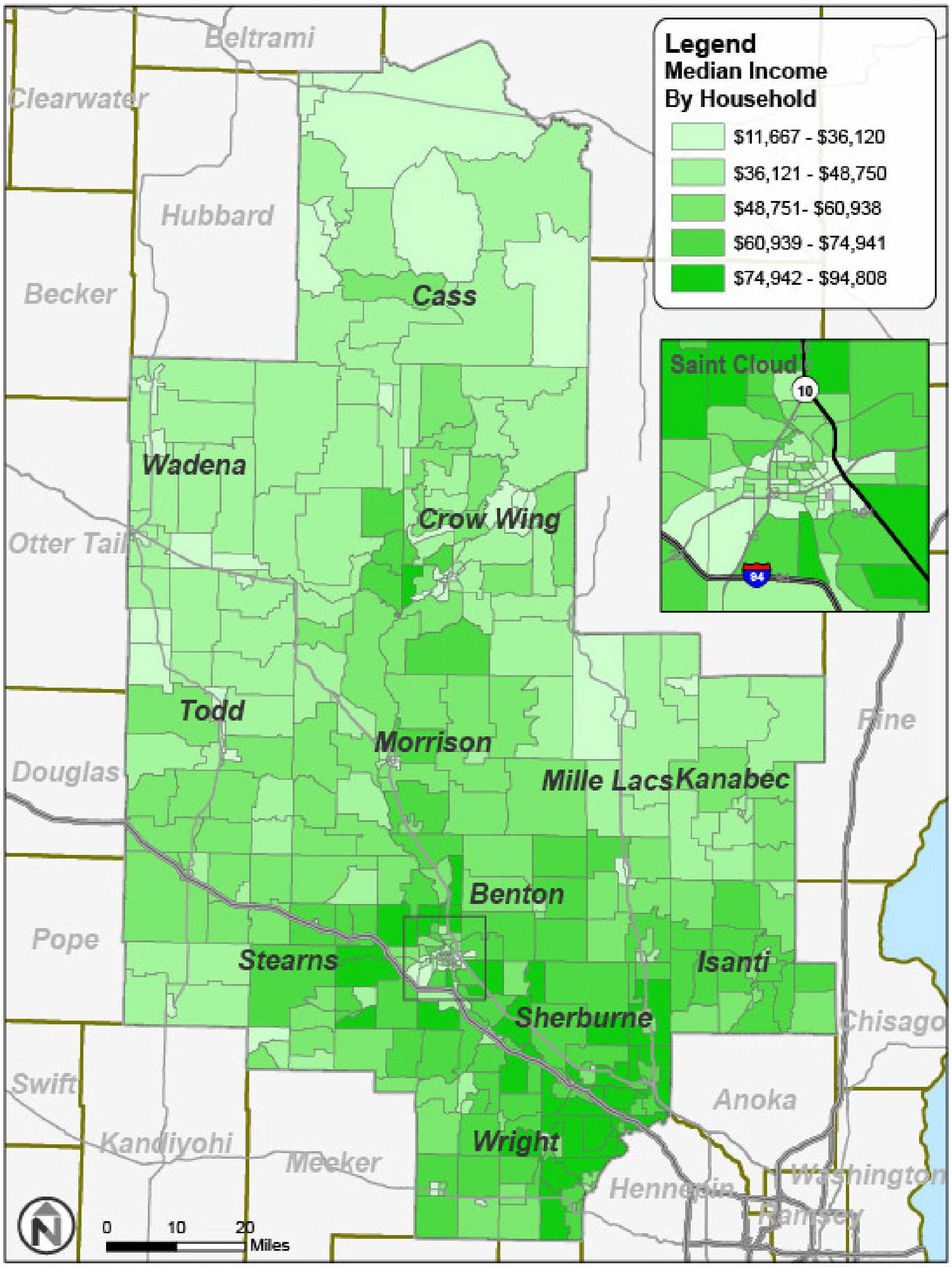
Figure 2-4 Age Groups by County in District 3

Geography	Total Population	Under 18	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 and Over
Benton County	38,451	24.7%	10.7%	15.7%	12.9%	13.8%	10.3%	11.9%
Cass County	28,567	21.7%	6.3%	9.3%	10.3%	15.3%	16.1%	21.1%
Crow Wing County	62,500	23.0%	7.5%	11.4%	11.2%	14.7%	13.7%	18.5%
Isanti County	37,816	25.9%	8.0%	13.0%	13.2%	16.4%	11.2%	12.4%
Kanabec County	16,239	24.0%	6.6%	10.9%	12.0%	16.4%	13.7%	16.4%
Mille Lacs County	26,097	25.3%	7.7%	11.8%	12.4%	15.2%	11.4%	16.1%
Morrison County	33,198	24.6%	7.6%	11.8%	11.7%	15.7%	12.6%	16.0%
Sherburne County	88,499	29.1%	8.5%	14.0%	15.7%	15.1%	9.4%	8.3%
Stearns County	150,642	23.2%	15.6%	13.1%	11.5%	13.9%	10.6%	12.1%
Todd County	24,895	24.9%	7.4%	10.5%	10.7%	15.4%	13.6%	17.4%
Wadena County	13,843	24.0%	7.3%	10.0%	10.5%	14.5%	12.7%	21.1%
Wright County	124,700	30.0%	6.6%	14.0%	15.4%	14.8%	9.6%	9.6%
District 3 Total	**645,447**	**25.7%**	**9.5%**	**12.9%**	**12.9%**	**14.8%**	**11.2%**	**13.0%**
Minnesota	**5,303,925**	**24.2%**	**9.5%**	**13.5%**	**12.8%**	**15.2%**	**11.9%**	**12.9%**

Source:2010 US Census

Households with lower incomes are generally more dependent on transit services than those with higher incomes. The telephone survey results (discussed in Chapter 5), however, show that individuals with incomes of at least $75,000 are more likely to use transit.

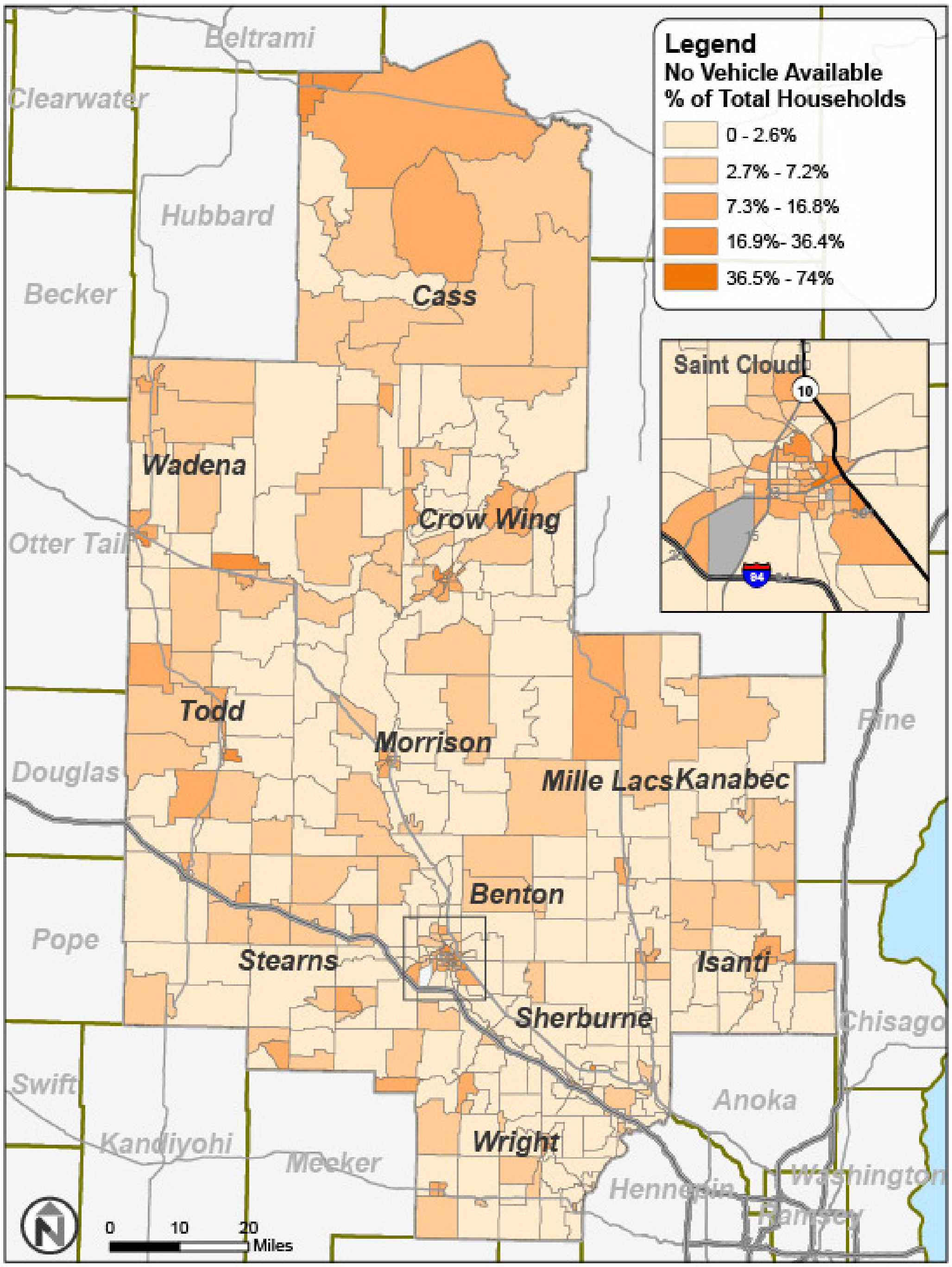
Figure 2-5 Median Income by Block Group



Data Sources: ACS 5-year Data 2005-2009

Figure 2-5 shows the median incomes of each census block group in District 3. Median income is far higher in Wright, Sherburne, and Stearns Counties, closer to the Twin Cities. Central and southwestern St. Cloud are exceptions to the generally higher incomes in Stearns County. High incomes can also be seen north of Brainerd along the Cass and Crow Wing border, and to a lesser degree in Benton and Isanti Counties.

Figure 2-6 Households without a Vehicle by Block Group



Data Sources: ACS 5-year Data 2005-2009

Vehicle ownership shows an inverse pattern, with slightly higher percentages of households without a vehicle in central St. Cloud and the more rural portions of many counties. Rates of households with no vehicle are lower closer to Minneapolis, especially in Wright and Sherburne Counties (See Figure 2-6).

Population in the Labor Force

Benton and Isanti Counties have the highest percentage of workers in the labor force compared to the overall county population. Sherburne and Stearns Counties also have a higher percentage than the district as a whole.

Figure 2-7 Labor Force as Percentage of Total Population

County	Labor Force	% of Total Population
Benton	23,387	60.8%
Cass	14,721	51.5%
Crow Wing	34,856	55.8%
Isanti	21,852	57.8%
Kanabec	8,008	49.3%
Mille Lacs	11,800	45.2%
Morrison	18,345	55.3%
Sherburne	49,552	56.0%
Stearns	85,674	56.9%
Todd	12,797	51.4%
Wadena	6,404	46.3%
Wright	68,417	54.9%
Total District 3	**355,813**	**55.1%**

REGIONAL EMPLOYMENT CHARACTERISTICS

The total average annual employment in District 3 equaled over 230,000 in 2010. Stearns County is home to the highest average annual employment (77,124), with double the number of the next-highest county, Wright, which has 35,045 employees, as shown in Figure 2-8.

Figure 2-8 Employees by County

County	Average Annual Employment
Benton	15,749
Cass	9,697
Crow Wing	27,054
Isanti	10,113
Kanabec	3,577
Mille Lacs	8,882
Morrison	11,102
Sherburne	22,258
Stearns	77,124
Todd	6,038
Wadena	5,633
Wright	35,045
Total District 3	**232,272**

Source: DEED

A majority of the labor force living in District 3 also works in District 3 – 180,000 individuals. An additional 40,000 commute to jobs outside of the district. (See Chapter 6 for a more detailed discussion of commuting patterns.)

Major Employers

The five largest employers in the region are listed in Figure 2-9, each employing over 1,000 people. Three are in St. Cloud, which is also home to the highest numbers of employers in the region. One is in Big Lake, along US 10, and one is in northern Mille Lacs County, on US 169.

Figure 2-9 Five Largest Private Employers

Employer Name	Industry	Address	Town/City	County
Classic Glass & Mirror	Construction	19920 Industrial Drive	Big Lake	Sherburne
Electrolux Home Products	Manufacturing	701 33rd Avenue	St. Cloud	Stearns
Grand Casino Mille Lacs	Lodging	16597 Casino Drive	Onamia	Mille Lacs
JFC, Inc	Misc Offices	4150 2nd Street S	St. Cloud	Stearns
VA Medical Center	Medical	4801 Veterans Drive	St. Cloud	Stearns

Source: MnProspector (DEED)

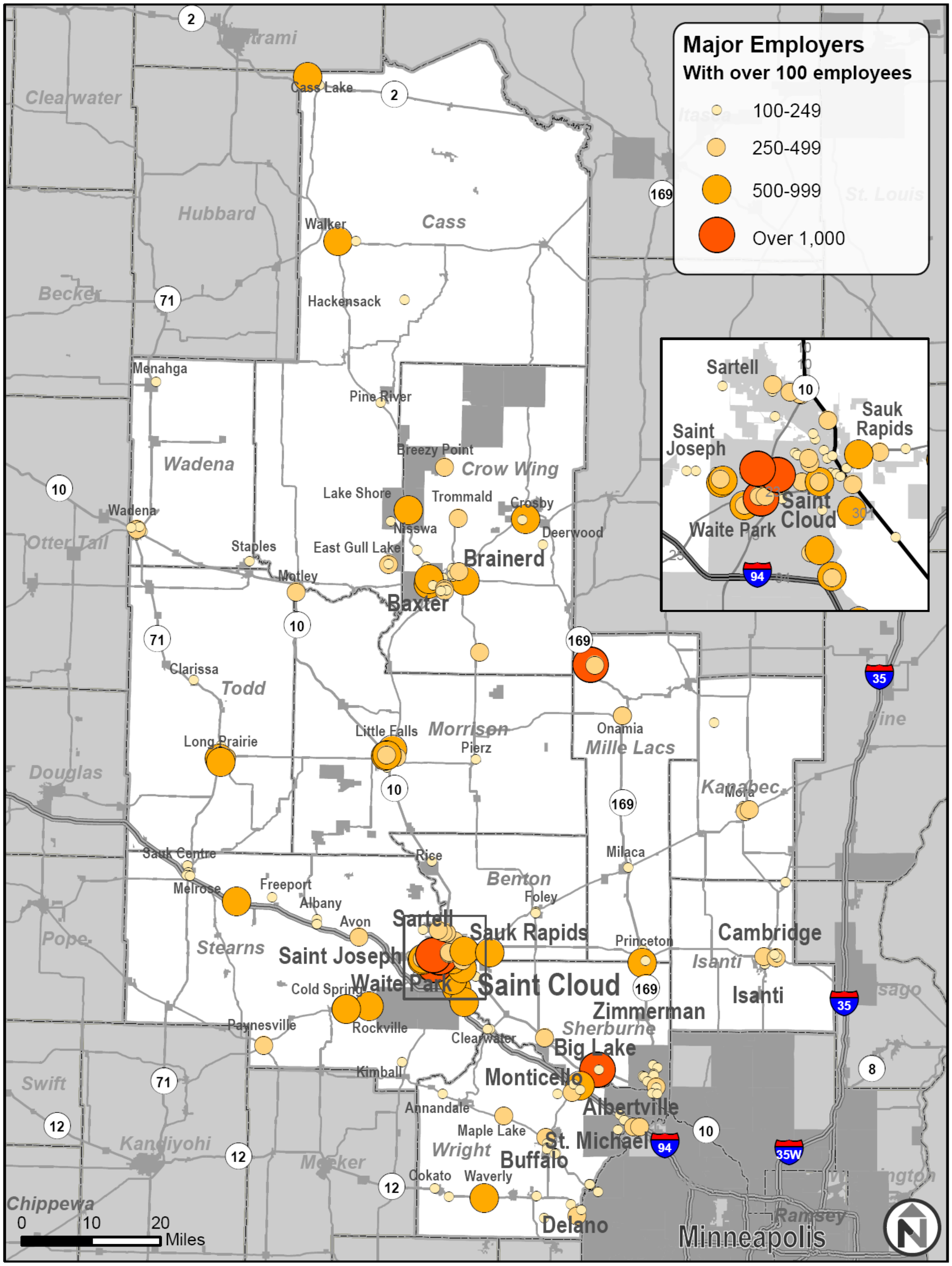
Although public organizations — cities, counties and school districts — are among the largest employers in the study area, over 280 private businesses in District 3 employ 100 employees or more (see Figure 2-10). Stearns County is home to the highest number of large private employers, with 105 of them. Other counties with relatively high numbers of large private employers include Crow Wing (43) and Wright (39). A map of these employers can be seen in Figure 2-11 and a full list is included in Appendix H. Also in the same appendix is a list of the five largest employers in each city or town in the region with over 1,000 residents.

Figure 2-10 Businesses Employing 100 or more Persons

County	Number of Firms Employing 100 or more
Benton	11
Cass	6
Crow Wing	43
Isanti	12
Kanabec	3
Mille Lacs	19
Morrison	12
Sherburne	18
Stearns	105
Todd	9
Wadena	6
Wright	39
Total	**283**

Source: DEED

Figure 2-11 District 3 Major Employers



Data Sources: Minnesota Department of Employment and Economic Development

As the map in Figure 2-11 shows, a majority of employers are situated along major corridors, primarily I-94 and US 10 in the Big Lake-St. Cloud corridor, and along US 10 and MN 371 further north in the Brainerd-Baxter region.

Employment Projections

Despite job losses as a result of the recession, counties in Region 7E and 7w experienced nearly 7% in job growth between 1999 and 2009. Labor force numbers across the country peaked in 2007, and Region 7W experienced the fastest growth up to 2007 and the sharpest decline in employment from the recession.[1] This region, which includes Benton, Sherburne, Stearns, and Wright Counties, is expected to show the strongest job growth in the state in the coming decade. Projections show a 12.9% increase in job growth in these counties. Region 7E, which includes Isanti, Kanabec, and Mille Lacs Counties, is also predicted to see a 12.9% increase in employment. This growth strongly outpaces the state's overall projected increase of 8.7%.

Region 5 employment is expected to increase by 7.9%. Region 5 includes Cass, Crow Wing, Morrison, Todd, and Wadena Counties.

Central Minnesota is expected to grow slightly faster in some sectors compared to the state as a whole, and more slowly in others. Many of the faster growth sectors will require workers to commute during peak hours, though some, such as jobs in the service sector, may not employ workers at traditional shift times. Many service sector positions require evening and weekend hours.

Figure 2-12 Percent Change in Employment 2009-2019

	Central Mn	Minnesota
Management, business, and finance	6.5%	11.1%
Professional	24.7%	33.9%
Service	37.3%	35.5%
Sales	7.2%	5.1%
Office and administrative support	10.2%	7.7%
Farming, fishing, and forestry	-0.9%	0.0%
Construction and extraction	5.6%	5.2%
Installation, maintenance, and repair	3.1%	1.9%
Production	2.1%	-1.9%
Transportation and material moving	4.2%	1.5%

Source: DEED

[1]http://www.positivelyminnesota.com/Data_Publications/Employment_Review_Magazine/May_2011_Edition/Projected_Regional_Employment_Growth,_2009-2019.aspx

COLLEGES AND UNIVERSITIES

Several technical colleges, as well as four-year and graduate education programs have on-campus classes in District 3. Colleges and universities often have the potential for a higher transit ridership base than services designed for the general public, particularly when colleges assess a fee for parking, or when students have limited access to a reliable automobile. Many colleges and universities partner with transit agencies to promote ridership.

The primary colleges in District 3 include the following:

- St. Cloud State University, located St. Cloud. The university is the largest institution in District 3, with approximately 15,000 students.
- St. John's University and the College of St. Benedict are located in the cities of Collegeville and St. Joseph and have nearly 4,000 registered students.
- College of St. Scholastica, with campuses in Brainerd and St. Cloud, serves several hundred students who take classes in these locations.
- St. Cloud Technical College, in St. Cloud, offers technical programs and coursework to nearly 6,000 students.
- Rasmussen College, with a campus in St. Cloud, is a private college that offers bachelor and associate degrees with 500 enrolled students.
- Minnesota School of Business, in Waite Park, offers business and technical career training programs.
- Central Lakes College is a community and technical college with campuses in both Brainerd and Staples, with nearly 6,000 enrolled students between the two campuses.
- Minnesota State Community and Technical College in Wadena has nearly 800 registered students, and offers a number of two-year certificate and technical programs.

DEVELOPMENT CHARACTERISTICS

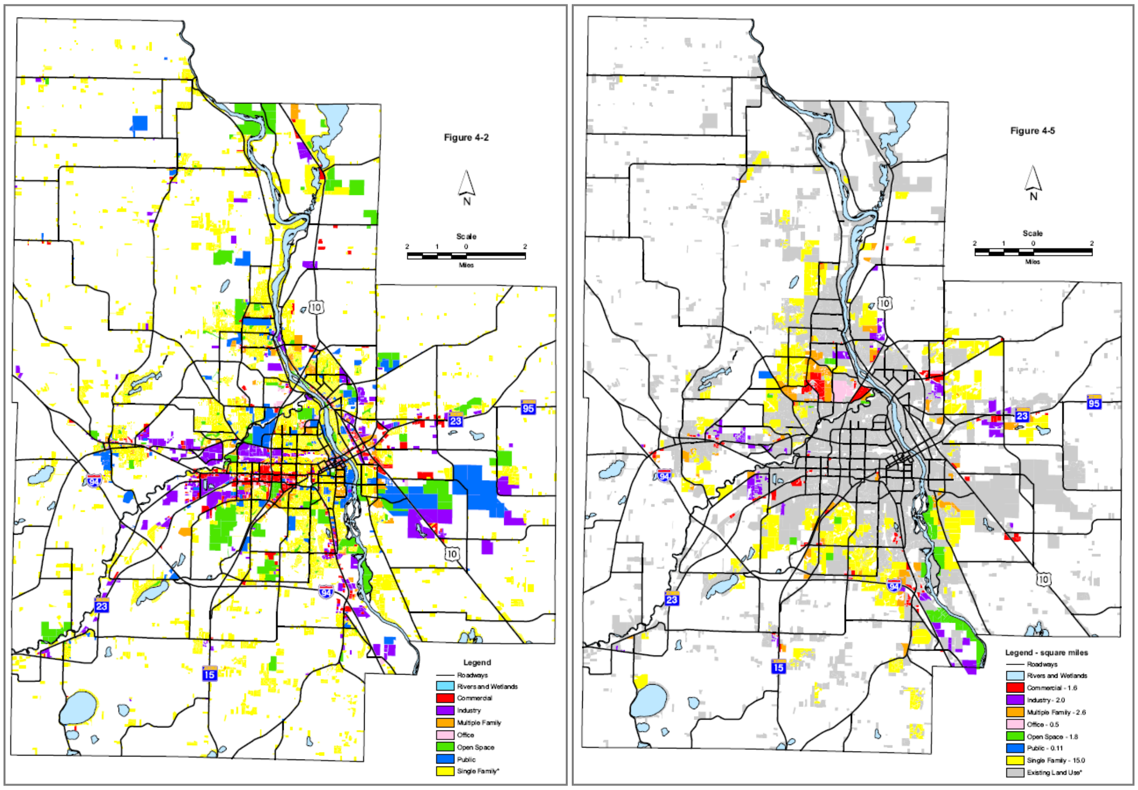
Though development patterns are difficult to project on a region-wide basis, particularly in the strained economy developers are experiencing nationwide, a few indicators point to continued development along major highway corridors.

Most of the information presented in this chapter examines existing conditions in Central Minnesota. While it is important to document existing land uses, it is also important to understand how the area is changing. The St. Cloud Area Planning Organization (APO) recognizes the necessity of constrained land development and alternative transportation options to create density; however, the APO's 2035 Transportation Plan acknowledges the likelihood of increased undeveloped land area in the St. Cloud region.

The APO anticipates an additional 23.7 square miles of developed area in the metropolitan region, 17.6 of which are designated as residential, 2.2 as commercial and office, 2 as industrial, and 1.9 as other.

The projected land uses and built area for 2035 are displayed in Figure 2-13. The 2035 Plan indicates residential (yellow) and industrial (purple) development edging closer to I-94 to the south of the city as well as to MN 23 to the east. Office space development (red) is anticipated to increase primarily across river from Highway 10, northwest of central city. Residential development is also predicted to increase in this area.

Figure 2-13 St. Cloud Area Existing (2005) and Projected (2035) Land Uses



Source: St. Cloud APO 2035 Transportation Plan

A number of communities, as well as the Minnesota Department of Employment and Economic Development (DEED), advertise "shovel ready" areas available for commercial and industrial development. In District 3, five areas are listed for new development:

- Site near both I-94 and MN 25 in Monticello
- Site in Big Lake fronting US 10
- Multiple sites in Alexandria fronting I-94
- Multiple sites in Cambridge within 1 mile of MN 65 and MN 95
- Multiple sites in Brainerd 1/4 mile from MN 371 and MN 210

Though no development is yet slated for these areas, the primary corridors of these sites — I-94, US 10, MN 25, MN 65, MN 95, MN 55, MN 371, and MN 210 — are likely to remain the focus of future development in the region. A few specific projects are noted, including a Super Wal-Mart planned for construction in Princeton, along MN 95, shopping mall redevelopment in Rockford, new manufacturing development on the east side of Wright County, and some potential new residential developments throughout the study area. Based on input from representatives at Regional Development Commissions and in some economic development offices within the study area, it was noted that residential development has significantly slowed in District 3, based primarily on the economic downturn and the large number of home foreclosures, particularly in the counties at the southern end of District 3.

CONCLUSION

Population density in the study area is relatively low. The greatest concentrations of population are in and around St. Cloud, as well as cities at the southern end of the study area, all of which have commute patterns that favor access to the Twin Cities.

Significant population growth is projected primarily in Sherburne, Isanti and Wright Counties, all of which will continue to build "bedroom community" residential developments for people commuting to Minneapolis and St. Paul. Growth is expected to be relatively strong in Benton, Mille Lacs, Crow Wing, and Stearns Counties, which may be the most likely candidates for new or expanded ridesharing and vanpooling within District 3. Many of the more rural counties are seeing stable growth with rapidly increasing senior populations. Interestingly, it is also in some of the most rural portions of the study area where automobile ownership rates are low, suggesting there may be more potential transit users in harder-to-reach areas, but not necessarily for commute needs.

The greatest concentration and diversity of jobs is in Stearns County, with many of those in and around St. Cloud. Both in the St. Cloud area and throughout the study area, most of the major employers are located along major freeways and highways. In District 3, this suggests many of the jobs are relatively accessible to potential transit lines that could be implemented in the future.