Excensus Tracking Data

How it differs from Typical Comprehensive Plan Data

- Collection of residential information spanning 4 years (2004-07) and the full 7-County Metro Area
- Household-level demographics, housing usage history & turnover patterns (1,065,000 profiled addresses)
- Counts (95% Coverage) - not estimates
- Parcel based – can be rolled up to almost any area
- Shows household change and housing usage flows.
Why Track Demographic Change?

Demographic mix to maintain a sustainable community should include:

- Diversity of ages
- Diversity of incomes
- Mobility – turnover and household moves – help to provide the availability of housing choice
- Retention – housing choice that includes options so that cities can retain households throughout their life cycles.
Metro Area Householder Ages

Twin Cities 7-County Area Householder Ages
Distribution of Households by Householder Age (2007)
(Data set covers 1,065,654 households in 2007*)
Source: Excensus LLC

Median Householder Age in 2007 was 48 years

* The Metropolitan Council's 2007 household estimate is 1,121,535.
Four Important Metro Area Themes

1. Migration of Young Households - from Minneapolis into the first-ring suburbs.
4. Households choice in housing throughout the region – Life cycles & housing diversity
First Theme:

Migration of Minneapolis Households to First Ring Suburbs
Young Base of Minneapolis Households & Suburban Hennepin County is Older

Minneapolis Householder Ages
Distribution of Households by Householder Age (2007)
(Data set covers 146,661 households in 2007*)
Source: Excensus LLC

Suburban Hennepin County Householder Ages
Distribution of Households by Householder Age (2007)
(Data set covers 306,128 households in 2007*)
Source: Excensus LLC

* The Metropolitan Council’s 2007 household estimate is 167,667.

* The Metropolitan Council’s 2007 household estimate is 314,898.
Most Younger Households In Rental Housing

Minneapolis' Home Owners and Renters
Homestead Status by Householder Age (2007)
(Data set covers 146,661 households*)
Source: Excensus LLC

Homeowners comprise 50.0% of all households and 28.0% of households under the age of 35.

Owners (73,326)
Renters (73,335)

% Homeowners:
28.0% < 25
56.6% 25-34
64.3% 35-44
68.8% 45+ 85+

* The Metropolitan Council's 2007 household estimate is 167,367.
Minneapolis HH Migration (2004-07)
Richfield is a First-Ring Destination

Richfield Householder Ages
Distribution of Households by Householder Age (2007)
(Data set covers 14,790 households in 2007*)
Source: Excensus LLC

Median Householder Age in 2007 was 48 years

% of All Households:
- Under Age 35: 22.1%
- Age 35 to 54: 40.4%
- Age 55 to 74: 24.2%
- Age 75+: 13.3%

* The Metropolitan Council's 2007 household estimate is 14,974.
Richfield Foreclosure (‘07-’08)

Richfield Homes in Foreclosure (1/2007 to 9/2008)
(Foreclosures by affordability* of home and age of householder)
(Data set covers 275 dwellings)
Source: Hennepin County and Excensus LLC

* Affordability measure based on the Metropolitan Council’s 2007 definition.
Incomes Appear to Be Holding


Source: Minnesota Department of Revenue (Median Federal Adjusted Gross Income as reported by Individual tax return – Tax year 2003 and 2006). Data is summarized by Census Block Group.
First Ring Suburbs is a market for younger households moving to owner-occupied single family housing.

Burst of New Student Enrollment (under age 4)

Also, there is a growing number of children living in rental townhomes & apartments.

Are these housing types able to accommodate young households – Do they have the amenities?
Second Theme:

Migration to the Southern Counties – Attracting Move-Up Households
Dakota County’s Incoming HHs (2004-07)
Dakota County Mix of Owned SFD and SFA

Affordability of Owned SF Housing in Dakota County (2007)
Affordability based on Metro Council's 2007 Threshold of $207,800
(Data set covers 112,897 Single Family, Owner-Occupied Dwellings)
Source: Excensus LLC

29.3% of all Owner-Occupied SF Homes were Affordable in 2007

Not Affordable ($207,800+)
(79,803)

Affordable (Less Than $207,800)
(33,094)

SF Detached (71,744)

SF Attached (8,059)

SF Detached (13,197)

SF Attached (19,897)

% of All Homeowners in Affordable SFD and % in SFA Housing:
14.9% / 37.0%  9.9% / 13.4%  11.2% / 16.0%  25.2% / 22.3%
Trends/Issues

- Affordability – younger households
- Full Range of Choices – more important move up and older households – different choices
- Access to jobs
- Transportation Options
Third Theme:

Household Turnover and Aging in Place – How does this Impacts Housing Choice?
Turnover of Homeowners 45+
Retention of SFD Household Moves (‘04-07)
Low turnover, low retention rates could be a result of not having a *Full Range of Housing Choices*

- Lack of attractive downsizing options – reduces turnover
- Social service push to keep older households in homes
- Destabilizing school enrollment levels
- Fewer opportunities for incoming younger households
- Changing needs for local city services
- Commercial market - realign to accommodate aging
-Increase in deferred housing maintenance
Fourth Theme:

Life Cycle Housing Choices Occuring with Changing Household Needs
Lifecycle and Lifestyle Choices

- There is clear evidence that households are choosing new housing types
  - This is occurring all across the metro area
- Households under age 35 are transitioning from rental housing (apartments) to single family existing housing or new single family attached
- SFD still majority housing choice for ages 35-54 (move up housing)
- Households 55+ tend to move from SFD to SFA
- Rental is a housing choice across all household ages
  - Many reasons - incomes, jobs, lifestyle, transition
## Lifecycle and Lifestyle Choices

<table>
<thead>
<tr>
<th>2004 - 2007 Moves</th>
<th>Total</th>
<th>LT Age 35</th>
<th>Age 35-54</th>
<th>Age 55-74</th>
<th>Age 75+</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Household Move-ins</strong></td>
<td>148,913</td>
<td>61,848</td>
<td>62,431</td>
<td>20,310</td>
<td>4,324</td>
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<tr>
<td>Distribution by Age</td>
<td>100%</td>
<td>42%</td>
<td>42%</td>
<td>14%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Moves to Owner-Occ. Housing</strong></td>
<td>103,498</td>
<td>41,394</td>
<td>47,257</td>
<td>13,403</td>
<td>1,444</td>
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<tr>
<td>Pct. Of All HH Moves</td>
<td>70%</td>
<td>67%</td>
<td>76%</td>
<td>66%</td>
<td>33%</td>
</tr>
<tr>
<td>* To Owned SF Detached</td>
<td>80,310</td>
<td>32,740</td>
<td>38,447</td>
<td>8,349</td>
<td>774</td>
</tr>
<tr>
<td>Pct. Of Owner-occ. Moves</td>
<td>78%</td>
<td>79%</td>
<td>81%</td>
<td>62%</td>
<td>54%</td>
</tr>
<tr>
<td>- From SFD Home</td>
<td>39,575</td>
<td>11,324</td>
<td>22,845</td>
<td>5,025</td>
<td>381</td>
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<tr>
<td>Pct. Of moves to SFD</td>
<td>49%</td>
<td>35%</td>
<td>59%</td>
<td>60%</td>
<td>49%</td>
</tr>
<tr>
<td>* To Owned SF Attached</td>
<td>23,188</td>
<td>8,654</td>
<td>8,810</td>
<td>5,054</td>
<td>670</td>
</tr>
<tr>
<td>Pct. Of Owner-occ. Moves</td>
<td>22%</td>
<td>21%</td>
<td>19%</td>
<td>38%</td>
<td>46%</td>
</tr>
<tr>
<td>- From SFD Home</td>
<td>7,893</td>
<td>1,401</td>
<td>3,237</td>
<td>2,817</td>
<td>438</td>
</tr>
<tr>
<td>Pct. of moves to SFA</td>
<td>34%</td>
<td>16%</td>
<td>37%</td>
<td>56%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Source: Excensus LLC

**All Metro Household Moves That Began and Ended in the 7-County Area (2004 to 2007)**
Conclusion

What are the success factors in achieving a full range of housing choices?
Full Range of Housing Choices

- Mix of housing to support diverse population across all age segments
- Sufficient turnover to permit regeneration of younger age segments
- Diverse workforce to meet regional employment demand in close proximity to where people live - close proximity to transportation options
- Connectivity will become more important – less driving, closer to amenities
What Next?

- Tie data to tools & strategies
  - June 15 program
- Educate through ULI MN/RCM Tool Box

What are you seeing in your city?