City of Saint Paul Market Watch Report

A Summary of Development, Economic, and Demographic Trends in the Capital City

Volume 7: Spring 2016

SAINT PAUL

The Most Livable City in America

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Seventh Semi-Annual Market Watch Report

The purpose of this report is to summarize the ways that Saint Paul is influenced by a constantly changing social and economic landscape. Saint Paul Market Watch is published semi-annually, and the indicators featured will continue to evolve to best capture the changes occurring within the city. The data presented in this report are sourced from a number of organizations, including the U.S. Census Bureau, the Minnesota Department of Employment and Economic Development, and various executive departments of the City of Saint Paul. Much of this data has not been previously reported to the public, although some may be available through other sources.

This issue builds on the information presented in previous editions by continuing to analyze trends in three important measures of city growth and development. Three major categories of data are organized according to color:

1. Building and Development (Orange)
2. Employment (Olive)
3. Demographics (Light Blue)

Consolidating this information in a single report provides a clearer, more understandable view of activity occurring within our city. Every stakeholder in the city, including the Mayor and City Council, residents, developers, workers, visitors, and businesses are more able to understand a wide variety of trends important to personal, social, and economic decisions. This report is designed to achieve a wide range of goals:

- Provide a rich source of information for everyone in the community
- Demonstrate policy outcomes in order to foster transparency and accountability for policy decisions
- Guide future decisions and policies
- Foster civic and community pride

Your suggestions, comments, or questions are welcome. Please contact Jake Reilly at jake.reilly@ci.stpaul.mn.us or 651-266-6618.

Jonathan Sage-Martinson
Department Director
jonathan.sage-martinson@ci.stpaul.mn.us
651-266-6565

Project Coordinator:
Jake Reilly
Senior Planner
jake.reilly@ci.stpaul.mn.us
651-266-6618

Research and Design:
Vincent Ferguson
Research Intern

City of Saint Paul, Department of Planning & Economic Development (PED)

25 W. 4th St., Suite 1300 Saint Paul, MN 55102

Building and Development

- Building and development activity in the city remains strong. More than $560 million in permits were issued during 2015. This is the highest dollar amount in the past seven years, surpassing the previous record set in 2014. The total number of permits per year has decreased slightly since 2013. However, 50 building permits worth more than $1 million were issued in 2015, more than double last year's total of 18 permits.

Housing

- While the number of building permits for single-family homes has remained steady in the past few years, the combined value of those permits is steadily increasing year over year. Yearly foreclosures have decreased by nearly 80% since 2008. The number of vacant buildings and total building demolitions show similar downward trends.

Employment and Wages

- Unemployment has dropped to 3.2% for the last quarter of 2015, and a 3.8% average for 2015 (down from the 5.3% average for 2014). The number of jobs in the city continues to increase over previous years.

Demographics

- Demographic data shows that Saint Paul's population has become more racially and ethnically diverse since 2009.
- The percentage of residents with a college or graduate degree continues to grow moderately, while the percentage of residents who have obtained a high school diploma declines moderately.
- Poverty rates in Saint Paul continue to increase. Communities of color are experiencing poverty at a greater rate than populations that identify as white.

The summary below shows directional trends for the year of 2015. Arrows indicate the relative direction of change compared to previous years while colors indicate whether these changes can be considered positive or negative for Saint Paul.

Positive trends in both directions represent changes that are generally good for the city, while negative trends represent detrimental changes. Some trends are characterized as neutral because the change is neither good nor bad for the city or its residents.

Building and Development

Total value of building permits

- $565.5 million

Total Number of permits

- 4,727

New Buildings

- 496

Projects over $1 million

- 50

Single-family Permits

- 1,360

New construction value

- $17.6 million

Addition Value

- $10.4 million

Remodel value

- $20.8 million

Demolitions

- 191 Total
  - 29 Commercial
  - 162 Residential

Foreclosures

- 465

Vacant buildings

- 846

Trends	Positive	Negative	Neutral
Increasing			
Decreasing			
Little or no change			

EMPLOYMENT AND WAGES*

Unemployment rate: 3.2% ▼

- Total employment: 148,319* ▲
- Total labor force: 153,160* ▲

Total jobs: 177,010 ▲

- Total +1.6% ▲
- Private +1.9% ▲
- Government: +0.3% ▲

Average weekly wages: $1,060 ▲

- +2.7% increase ▲

Trends	Positive	Negative	Neutral
Increasing	▲	▲	▲
Decreasing	▼	▼	▼
Little or no change			◀▶

*Statistics are based on data for the period from December 2014 through December 2015.

DEMOGRAPHICS*

Demographic changes 2005 to 2014

- Age groups with large population gains: ***20-24 years and 60-64 years***
- Age groups with large population losses: ***80+ years***

Poverty Rate

- Population below 50% of poverty level: 9.6%
- Population below 100% of povery level: 22.9%
- Population below 150% of poverty level: 34.0%

Race and Ethnicity

- Proportion of Asian, Black/African American, Latino/Hispanic populations
- Proportion of White population

Educational Attainment

- College educated residents
- Residents with high school diploma or less

Trends	Positive	Negative	Neutral
Increasing			
Decreasing			
Little or no change			

*Demographic estimates (unless otherwise noted) are based on two non-overlapping, American Community Survey 5-year Estimates: 2005-2009 and 2010-2014. This data is more accurate than 1-year estimates for examining demographic trends, and is the most current data available.

Please note that this differs from the 3-year estimates used in previous editions of Market Watch. Since the American Community Survey discontinued 3-year estimates after 2013, the 5-year estimates provide a more accurate basis for comparison and demographic trends.

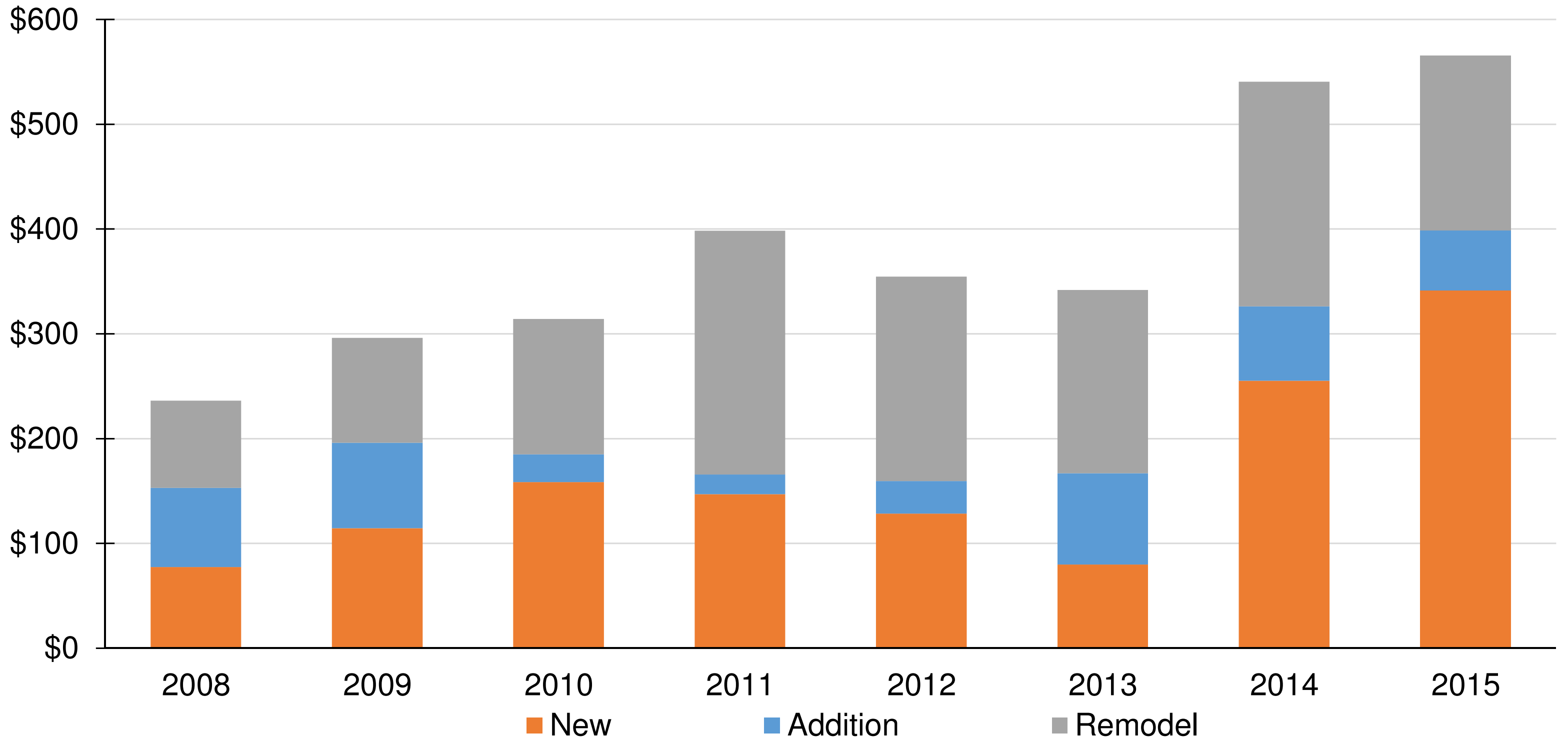
Value of Permits Over $50,000

Building permit value represents the cost of labor and materials for a construction project. Contractors must apply for permits before beginning construction, and typically before hiring construction workers. As a result, building permits are often an indicator of future trends in the rest of the economy. In 2015, new construction permits totaled $341.5 million, exceeding last year's total by more than $80 million. This is also the first year since 2010 that the majority of permit value came from new construction projects.

Table 1 - Combined total value of building permits in millons (2015 $)

Year	2008	2009	2010	2011	2012	2013	2014	2015
New	$77.5 M	$114.5 M	$158.5 M	$146.9 M	$128.4 M	$79.9 M	$255.3 M	$341.5 M
Addition	$75.4 M	$81.6 M	$26.5 M	$18.7 M	$31.1 M	$87.0 M	$71.0 M	$57.1 M
Remodel	$83.4 M	$100.2 M	$129.3 M	$232.7 M	$195.1 M	$175.0 M	$214.3 M	$167.0 M
Total Value	$236.3 M	$296.2 M	$314.3 M	$398.4 M	$354.6 M	$341.9 M	$540.6 M	$565.5 M

Figure 1 - Combined total value of building permits in millons, by type of permit (2015 $)

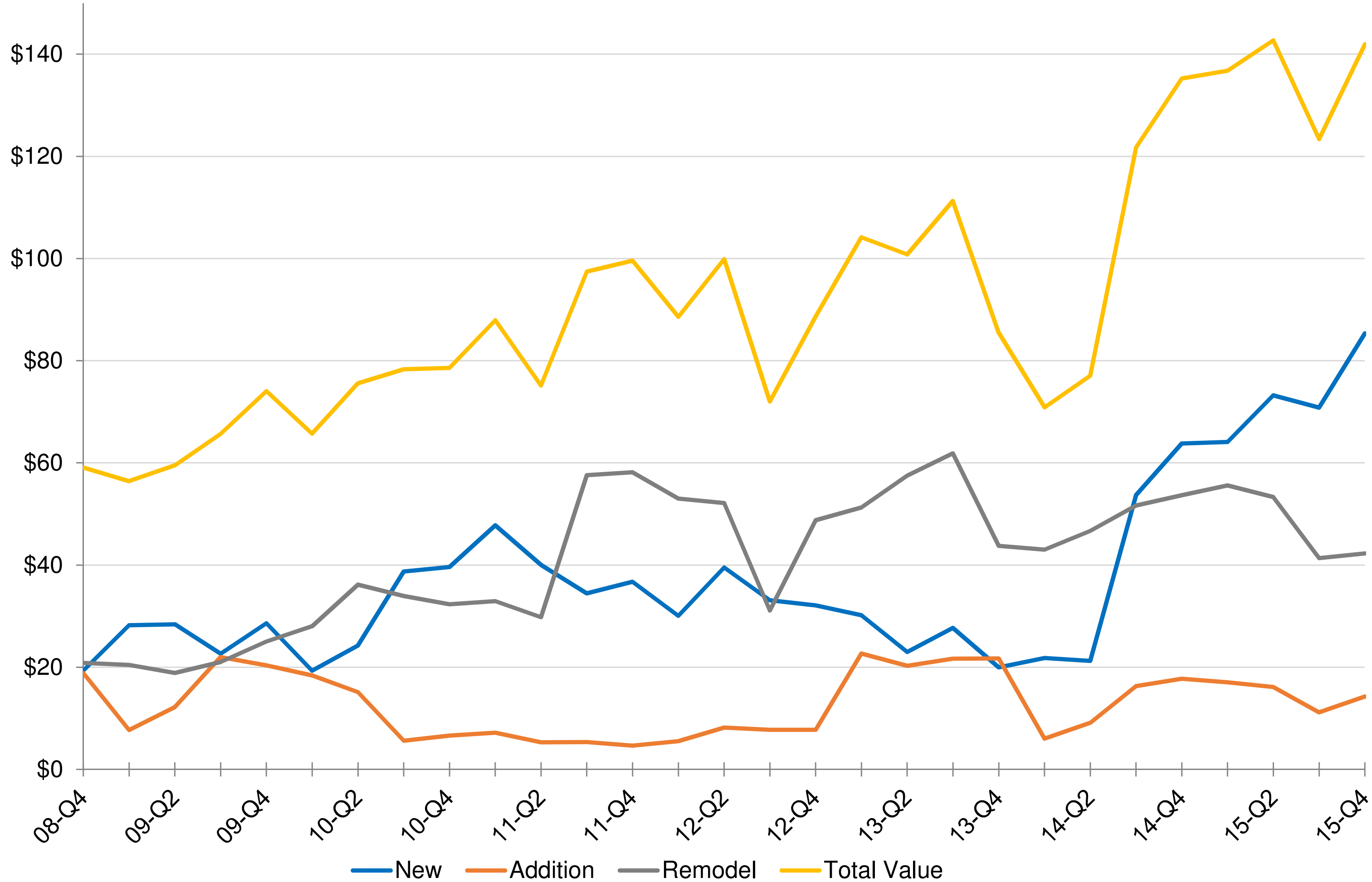


Permit value is the total permit value for permits issued. Since some projects take multiple years to complete, some projects still under construction were excluded. Further, the individual permit value may be lower than the total project cost.

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

The figure below depicts the trends in the total value of permits issued each year. As of Q4 2015, the rolling annual averages show that an average of $141.9 million in permits was issued each quarter over the past 12 months. This year ended with a total value of new permits substantially greater than previous years, while addition and remodel permits have decreased slightly since 2014. The positive trend in new construction since 2014 can perhaps be attributed to an overall strengthening of the economy as well as the opening of the Green Line in June of that year. New construction along the line includes CHS field, varied affordable housing developments, and streetscape upgrades, among others.

Figure 2 - Combined total value of select building permits, rolling annual average* (2015 $ in millions)



*The “rolling annual average” puts quarterly fluctuations in context with long term trends. Fluctuations are usually the result of temporarily elevated building activity, or because of large single-project permits within a particular quarter. Seasonality may also impact these figures.

Permit value is the total permit value for permits issued. Since some projects take multiple years to complete, some projects still under construction were excluded. Further, the individual permit value may be lower than the total project cost.

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development

Value of Permits Over $50,000

The total number of building permits issued each year in Saint Paul has remained close to 5,000 since 2009. The total number of permits issued for new construction in 2014 was the highest in the past seven years, and that total remained nearly as high in 2015. Although the total number of all types of permits is less than in recent years, the value of those permits has increased. Table 3 through Table 5, on the subsequent pages, break down these totals and highlight a few more interesting trends.

Table 2 - Number of building permits in Saint Paul, annual totals

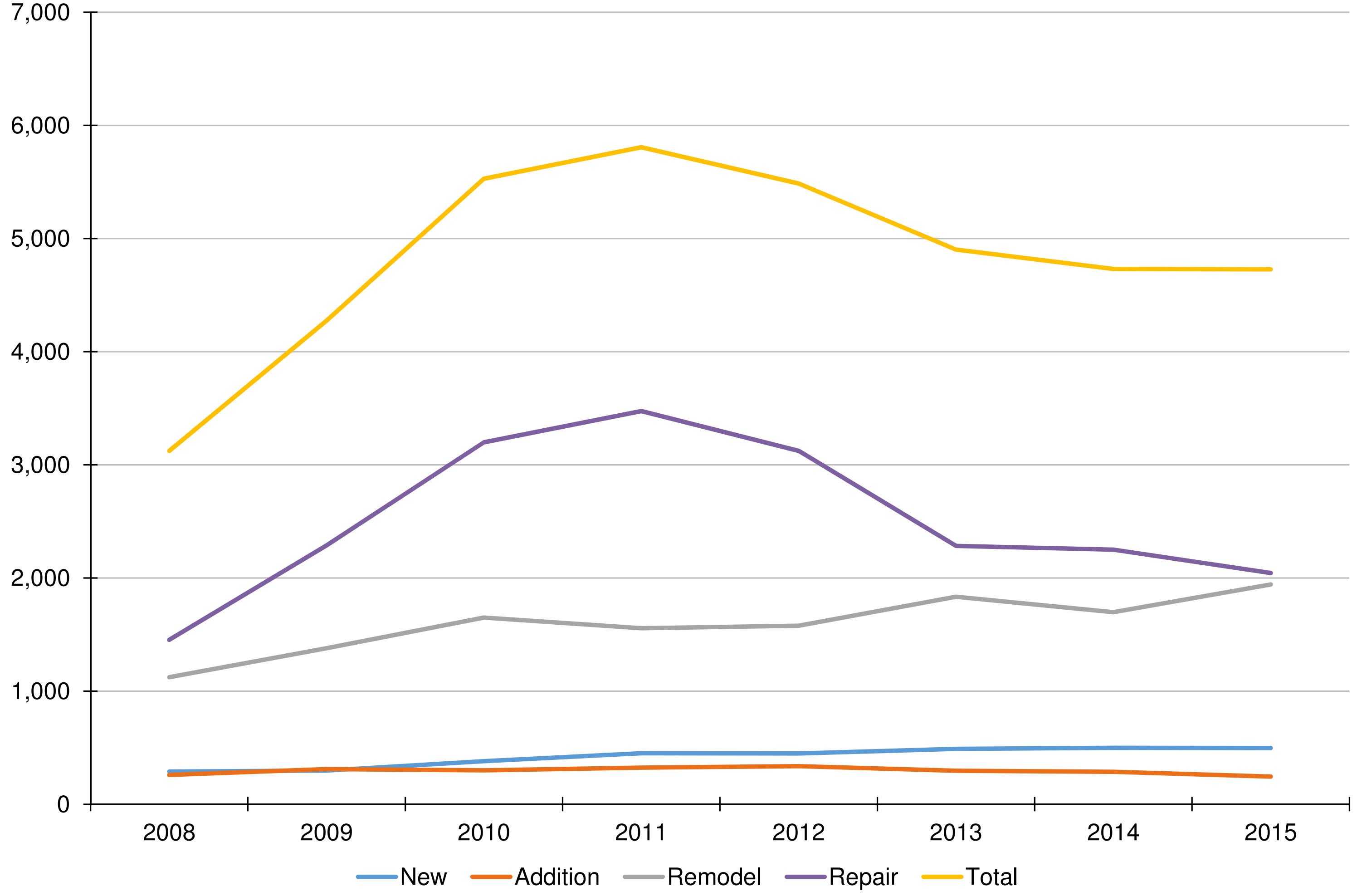
Year	2008	2009	2010	2011	2012	2013	2014	2015
New	288	297	380	451	448	489	499	496
Addition	259	310	300	324	337	296	286	244
Remodel	1,123	1,379	1,649	1,556	1,577	1,834	1,697	1,943
Repair	1,452	2,287	3,198	3,475	3,123	2,283	2,249	2,044
Total Number	3,122	4,273	5,527	5,806	5,485	4,902	4,731	4,727

Note: Permit value and number totals for past years may vary between this and past reports. This is due to an additional effort to eliminate duplicate permits in the Spring 2014 report. There are certain instances in which a permit record for a building is reported twice due to the necessity of obtaining a building permit for various types of work: electrical, plumbing, etc. In addition, 44 permits associated with LRT facility development between 2010 and 2012 were eliminated from this analysis.

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

The figure below graphically depicts trends in the number of permits issued each year. The number of permits have declined since their peak in the first quarter of 2012, but have remained steady through 2014 and 2015.

Figure 3 - Number of select building permits, annual totals



Note: Permit value and number totals for past years may vary between this and past reports. This is due to an additional effort to eliminate duplicate permits in the Spring 2014 report. There are certain instances in which a permit record for a building shows up twice due to the necessity of obtaining a building permit for various types of work: electrical, plumbing, etc. In addition, 44 permits associated with LRT facility development between 2010 and 2012 were eliminated from this analysis.

Permit value is the total permit value for permits issued. Since some projects take multiple years to complete, some projects still under construction were excluded. Further, the individual permit value may be lower than the total project cost.

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

Major Construction Projects

The City's Department of Safety and Inspections (DSI) issued 104 permits for new buildings in the first half of 2015. Since some projects require multiple permits, this total does not necessarily mean that 104 individual buildings were permitted. 2015 was a record year for residential construction, with more new residential units permitted in 2015 than in the previous five years combined. Some of these new single-family homes were constructed through the Inspiring Communities program. The City's Housing and Redevelopment Authority has worked to construct new homes through this program since 2010.

Table 3 - New building permits exceeding $50,000 (2015 $)

Year	2008	2009	2010	2011	2012	2013	2014	2015
Residential	22	22	19	25	43	47	67	71
Single-Family Home	15	14	17	23	32	43	61	56
Duplex	2	0	2	1	0	0	3	1
Multi-Unit	7	8	0	1	11	4	3	14
Units	449	348	0	44	382	224	98	1,040
Mixed Comm/Res	0	0	2	2	3	2	2	3
Units	0	0	108	60	435	348	318	627
Accessory Structure	7	9	13	12	16	17	11	8
Non-Residential	28	14	25	26	23	17	30	22
Commercial	25	9	11	16	17	14	18	14
Institutional	3	5	14	10	6	3	12	8
Totals*	**55**	**45**	**59**	**65**	**85**	**83**	**110**	**104**

*Dataset includes building permits for "New" buildings with the status of "Active/Issued," "Inspected," or "Finaled," indicating active or completed construction activity. Some projects may have permits pulled in one year, with construction continuing into the next year. Particularly large and complex projects may have multiple permits pulled for one construction project. As a result, these tallies do not represent an exact count of unique buildings permitted in any given year.

"Accessory Structure" could include Antenna, Carport, Garage, Shed, Pool-In Ground, Pool-Above Ground, Tower, Tank, Gazebo, or Other Accessory Structure

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

Table 4 lists new construction projects with at least one permit with a value greater than or equal to $1 million. During 2015, 20 new projects were issued at least one permit worth $1 million or more. As the table shows, eight of these permits were for mixed-use commercial/residential and multifamily residential construction projects. The remaining are a mix of institutional, commercial, and single-family residential construction.

Table 4 - New construction permits worth $1 million or more (2015 $)

Address	Project Name	Building Type	Permit value	Units
1575 Selby Ave	Whole Foods	Commercial	$4,695,633	
1761 University Ave W	Saint Paul YMCA	Commercial	$11,850,000	
200 7th St W	Hampden Hotel*	Commercial	$13,353,336	
353 7th St W	Regional Labor Headquarters	Commercial	$1,494,699	
50 Chester St	CHS, Inc. Warehouse	Commercial	$3,000,000	
661 Lasalle St	Office Building*	Commercial	$1,239,860	
1533 Dayton Ave	Primrose School	Institutional	$2,189,236	
295 Phalen Blvd	Health Partners Neuroscience Center*	Institutional	$51,589,761	
690 Birmingham St	Twin Cities Academy	Institutional	$11,897,521	
95 University Ave W	State Capitol Office Building*	Institutional	$23,952,614	
202 7th St W	West 7th Apartments*	Mixed (Commercial/ Residential)	$25,409,885	190
2700 University Ave W	City Limits Apartments	Mixed (Commercial/ Residential)	$37,273,368	246
1125 Hamline Ave N	Clubhouse and Apartments*	Residential (Multi-Fam)	$1,195,759	7
1305 Madison St	Madison Street Studio Apartments	Residential (Multi-Fam)	$4,185,317	53
1949 University Ave W	Prior Crossing Youth Housing	Residential (Multi-Fam)	$7,127,847	44
2140 Grand Ave	West Grand Avenue Apartments	Residential (Multi-Fam)	$3,138,868	14
411 Main St	Dorothy Day Center*	Residential (Multi-Fam)	$28,539,000	193
750 Otto Ave	Victoria Park Apartments*	Residential (Multi-Fam)	$20,331,207	197
142 Mississippi River Blvd N	New Home	Single Family Dwelling	$1,706,817	1
420 Mississippi River Blvd S	New Home	Single Family Dwelling	$2,208,823	1

*These projects all had multiple permits worth at least $1,000,000.

Permit value is the total permit value for permits issued only in 2015. Since some projects take multiple years to complete, some projects still under construction were excluded. Further, the individual permit value above may be lower than the total project cost.

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

Major Construction Projects

Table 5 lists building pemits for other types of construction including additions, remodels, and repairs. This list demonstrates the variety of projects located throughout the city. In 2015, 30 projects in Saint Paul were issued million-dollar permits, doubling last year's total of 15.

Table 5 - Recent construction projects over $1 million (2015 $)

Address	Description	Building Type	Activity	Permit value
10 7th St W	Children's Museum	Commercial	Addition	$13,471,271
10 River Park Plaza	Comcast Building	Commercial	Remodel	$2,530,106
1065 Phalen Blvd	Beacon Bluff Business Center	Commercial	Remodel	$1,022,542
1133 Rankin St	Exterior Remodel	Commercial	Remodel	$2,484,925
1301 L'Orient St	Metro Mechanical Contractors	Commercial	Remodel	$4,042,428
161 St Anthony Ave	Sweetwater Grill & Bar & Banquet	Commercial	Remodel	$3,413,635
17 7th Place W	Palace Theater	Commercial	Remodel	$1,506,015
180 Kellogg Blvd E	US Post Office	Commercial	Remodel	$16,332,650
1800 Ames Ave	Academia Cesar Chavez	Institutional	Addition	$3,705,067
200 University Ave E	Gillette Children's Hospital	Institutional	Remodel	$1,292,161
205 Wabasha St S	HealthPartners St Paul Clinic	Commercial	Remodel	$3,110,986
2080 Ford Pkwy	Target	Commercial	Remodel	$1,414,850
209 Page St W	Baker Recreation Center	Institutional	Addition	$1,676,056
225 Smith Ave N	John Nasseff Neuroscience Specialty Clinic	Institutional	Remodel	$1,420,682
235 Marshall Ave	St Paul College	Institutional	Remodel	$1,197,800
261 Chester St	FedEx Ship Center	Commercial	Remodel	$1,543,407
30 7th St E	Wells Fargo Place	Commercial	Remodel	$1,594,346
305 St Peter St	World Architects & Engineers	Commercial	Remodel	$1,178,560
333 Smith Ave N	United Hospital	Institutional	Remodel	$6,424,828
345 Smith Ave N	Children's Hospital	Institutional	Remodel	$1,553,240
354 Wabasha St N	American Burger Bar	Commercial	Remodel	$1,160,000
380 St Peter St	Lawson Commons	Commercial	Remodel	$1,693,992
400 Western Ave N	Sunlight Senior Living	Commercial	Addition	$2,200,000
543 James Ave	Premier Storage LLC	Commercial	Remodel	$2,510,026
59 10th St W	Saint Joseph's Hospital Parking Ramp	Institutional	Repair	$1,180,000
640 Jackson St	Regions Hospital	Institutional	Remodel	$1,100,448
700 Snelling Ave S	Gloria Dei Lutheran Church	Institutional	Repair	$1,359,180
701 Barge Channel Rd	Hawkins, Inc. Terminal 2	Commercial	Addition	$1,992,932
75 Rev Dr Martin Luther King Jr Blvd	State Capitol Building	Institutional	Remodel	$2,989,398
781 Palace Ave	Palace Recreation Center	Institutional	Addition	$2,820,593

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

The total value of single-family home permits demonstrates increased investment in building, improving, and renovating single-family homes in Saint Paul. While new permit values took a slight dip in the third quarter of 2015, this year's total value of single family home permits ($48.8 mil) remains higher than any previous year since 2009.

Figure 4 - Value of select single-family home permits, rolling annual average* (2015 $)

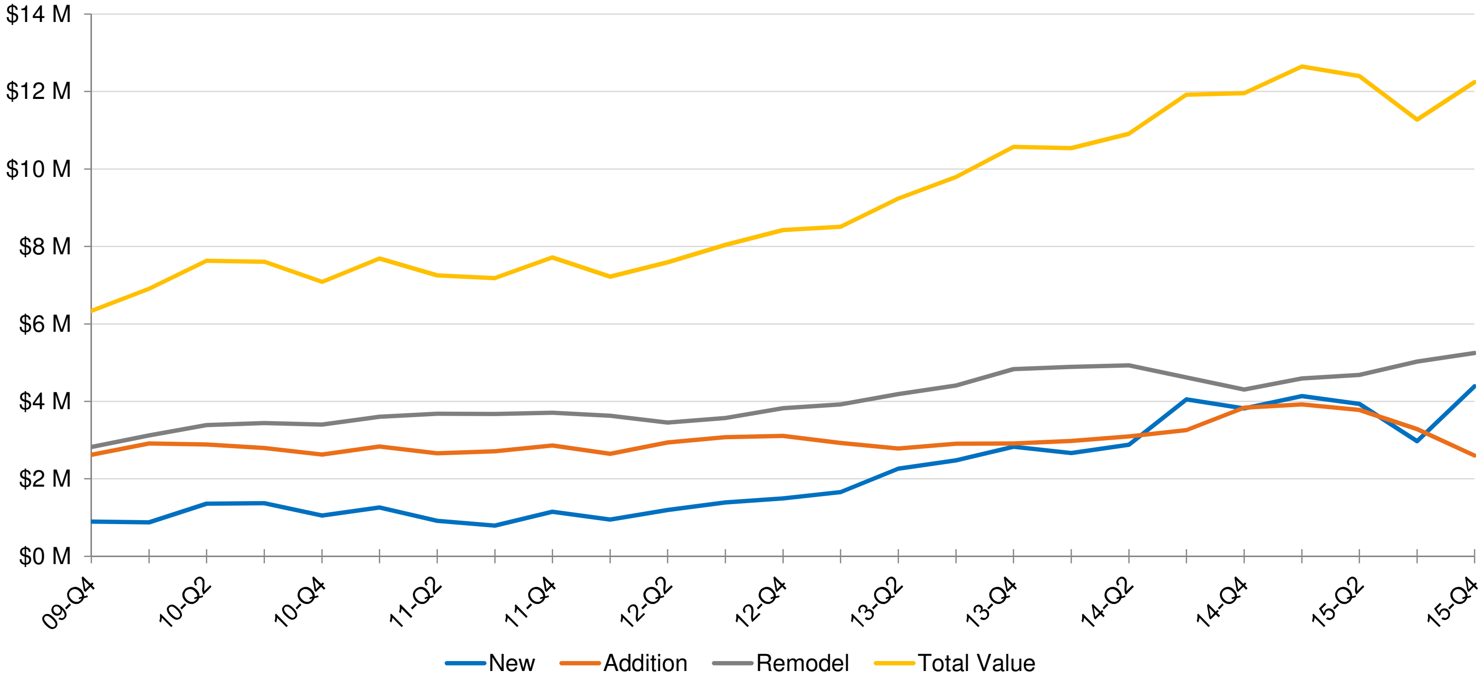


Table 6 - Total Annual Value of Select Permits for Single-Family Homes, in millions (2015 $)

Year	2009	2010	2011	2012	2013	2014	2015
New	$3.6	$4.2	$4.6	$6.0	$11.3	$15.3	$17.6
Addition	$10.7	$10.5	$11.4	$12.4	$11.6	$15.4	$10.4
Remodel	$12.8	$13.6	$14.8	$15.3	$19.3	$17.0	$20.8
Total Value	**$27.1**	**$28.3**	**$30.9**	**$33.7**	**$42.3**	**$47.7**	**$48.8**

*The "rolling annual average" puts quarterly fluctuations in context with long term trends. Fluctuations are usually the result of temporarily elevated building activity, or because of large single-project permits within a particular quarter. Seasonality may also impact these figures.

Permit value is the total permit value for permits issued. Since some projects take multiple years to complete, some projects still under construction were excluded. Further, the individual permit value may be lower than the total project cost.

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

The total number of addition, remodel, and new building permits issued for single-family homes has been increasing since 2009. The large increase in total permits issued is primarily due to an increase in the number of permits issued for remodel projects; remodeling permits continue to dominate the total number of single-family home construction permits.

Figure 5 - Total number of single-family home permits, 2009 - 2015

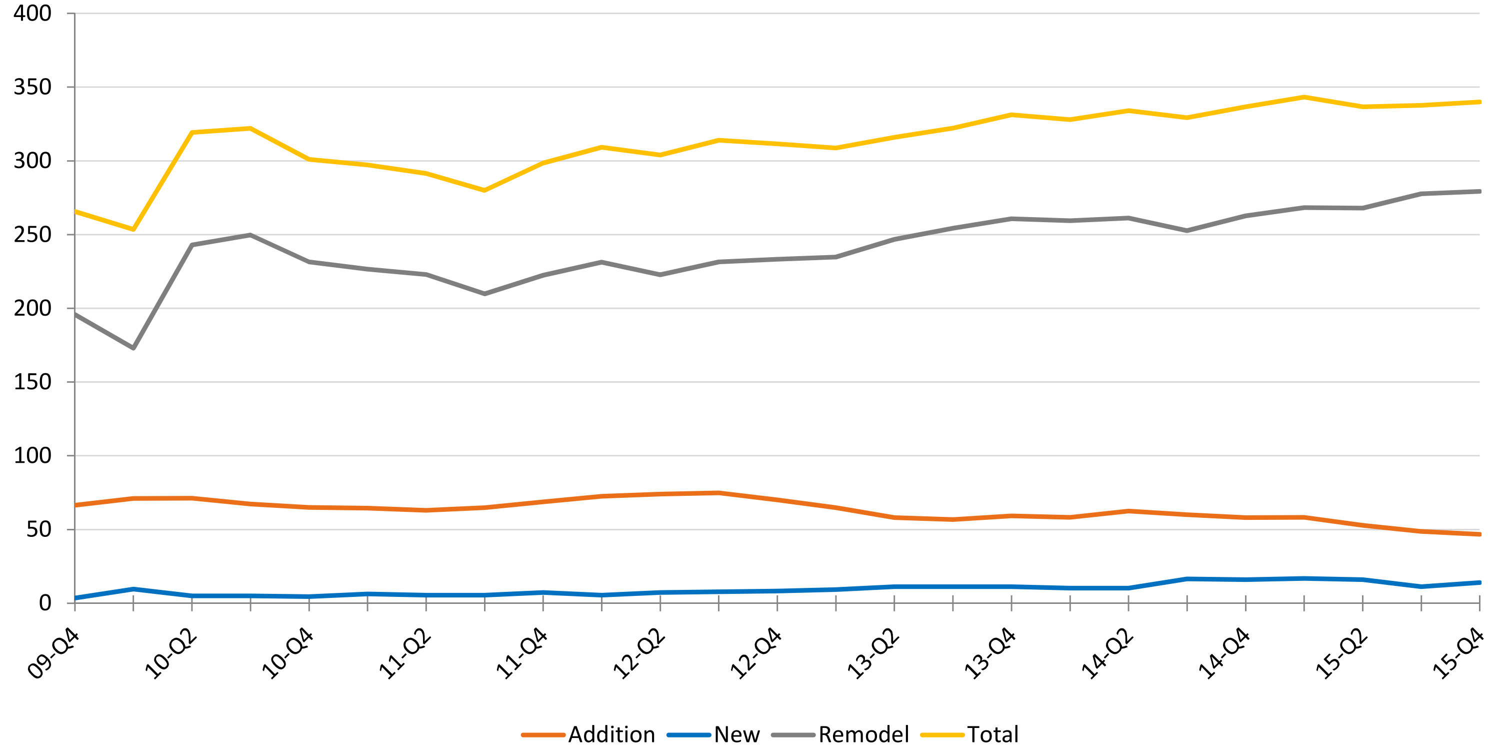


Table 7 - Total number of Select Permits for Single Family Homes

Year	2009	2010	2011	2012	2013	2014	2015
Addition	14	18	29	33	45	64	187
New	266	260	275	280	237	232	56
Remodel	783	926	890	933	1,043	1,038	1,117
Total	**1,063**	**1,204**	**1,194**	**1,246**	**1,325**	**1,334**	**1,360**

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

Thirteen major multi-family residential construction projects were issued permits worth more than $1 million in 2015. The projects with the highest issued permit values include the new City Limits Apartments on University Ave., and the new Waters of Highland Park assisted living building on Snelling Ave. Several other substantial remodel and repair projects are occuring throughout the city.

Table 8 - Current active or completed residential construction projects over $1 million (2015 $)

Address	Project Name	Building Type	Activity	Permit value	# of Units
1925 Norfolk Ave	Saint Mary's Home	Multi-Family	Addition	$8,171,022	129
2700 University Ave W	2700 University	Commercial/ Residential	New	$37,273,368	248
202 7th St W	Oxbō	Commercial/ Residential	New	$25,409,885	190
411 Main St	Dorothy Day	Multi-Family	New	$28,539,000	193
750 Otto Ave	Victoria Park Apartments	Multi-Family	New	$20,331,207	197
1949 University Ave W	Prior Crossing	Multi-Family	New	$7,127,847	44
1305 Madison St	Madison Street Studio Apts	Multi-Family	New	$4,185,317	53
2140 W Grand Ave	West Grand Ave Apartments	Multi-Family	New	$3,138,868	14
1125 Hamline Ave N	Park Pointe	Multi-Family	New	$1,195,759	7
420 Mississippi River Blvd S	New Home	Single Family Dwelling	New	$2,208,823	1
142 Mississippi River Blvd N	New Home	Single Family Dwelling	New	$1,706,817	1
1247 St Anthony Ave	Skyline Towers	Multi-Family	Repair	$7,065,014	505
250 6th St E	Cosmopolitan on Mears Park	Multi-Family	Repair	$2,077,808	255

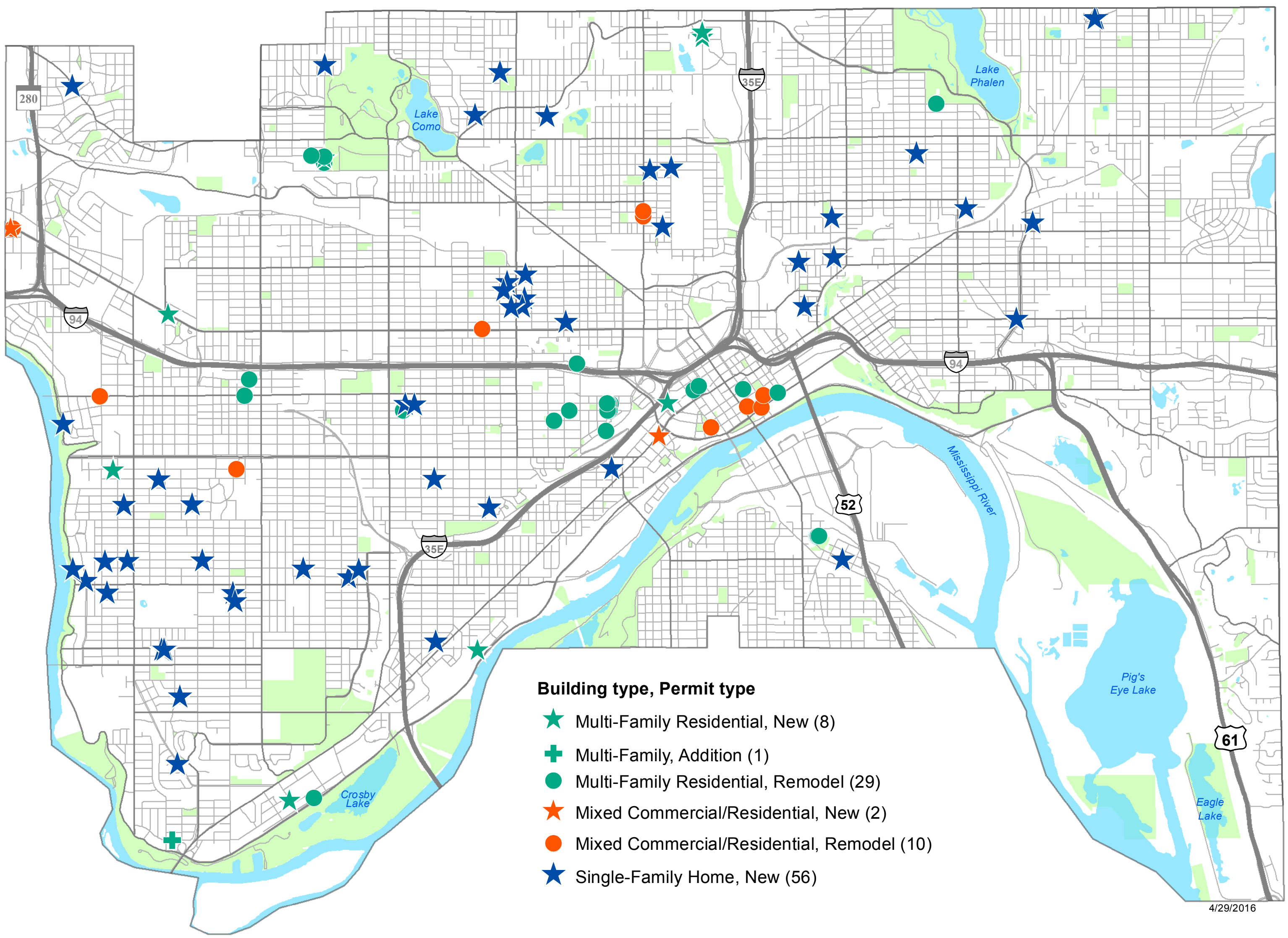
Since some projects take multiple years to complete, some projects still under construction were excluded. Further, the individual permit value may be lower than the total project cost. Some projects under construction in 2015 were issued permits in previous years, at an earlier stage in the development process. Permit value stated in the table represents the total value of individual permits issued in 2015 with individual value over $1 million. For example, if a project has one permit for $8 million and one permit for $1 million, the total permit value would be $9 million. Smaller permits for these projects are not included in the totals.

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

Residential Construction

This map shows the location of permits worth at least $50,000 for new construction, additions, and remodeling of multi-family and mixed-use residential buildings, as well as permits for new single-family homes. Of these permits 12 are worth more than $1 million in value.

Figure 6 - Location of selected new, addition, and remodel permits worth at least $50,000 (2015 $)



Source: Saint Paul Department of Safety and Inspections, mapped by Saint Paul Planning and Economic Development.

A total of 191 demolition permits were issued in 2015. More than 80% of permits were issued to demolish residential buildings or residential accessory structures. The split between the two was about even with 44% of permits for demolishing residential accessory structures and 41% going to demolish residential buildings. Table 9 lists the number of demolitions across the city dating back to 2009. Figure 7 on the following page shows the locations of residential and commercial demolitions across the city.

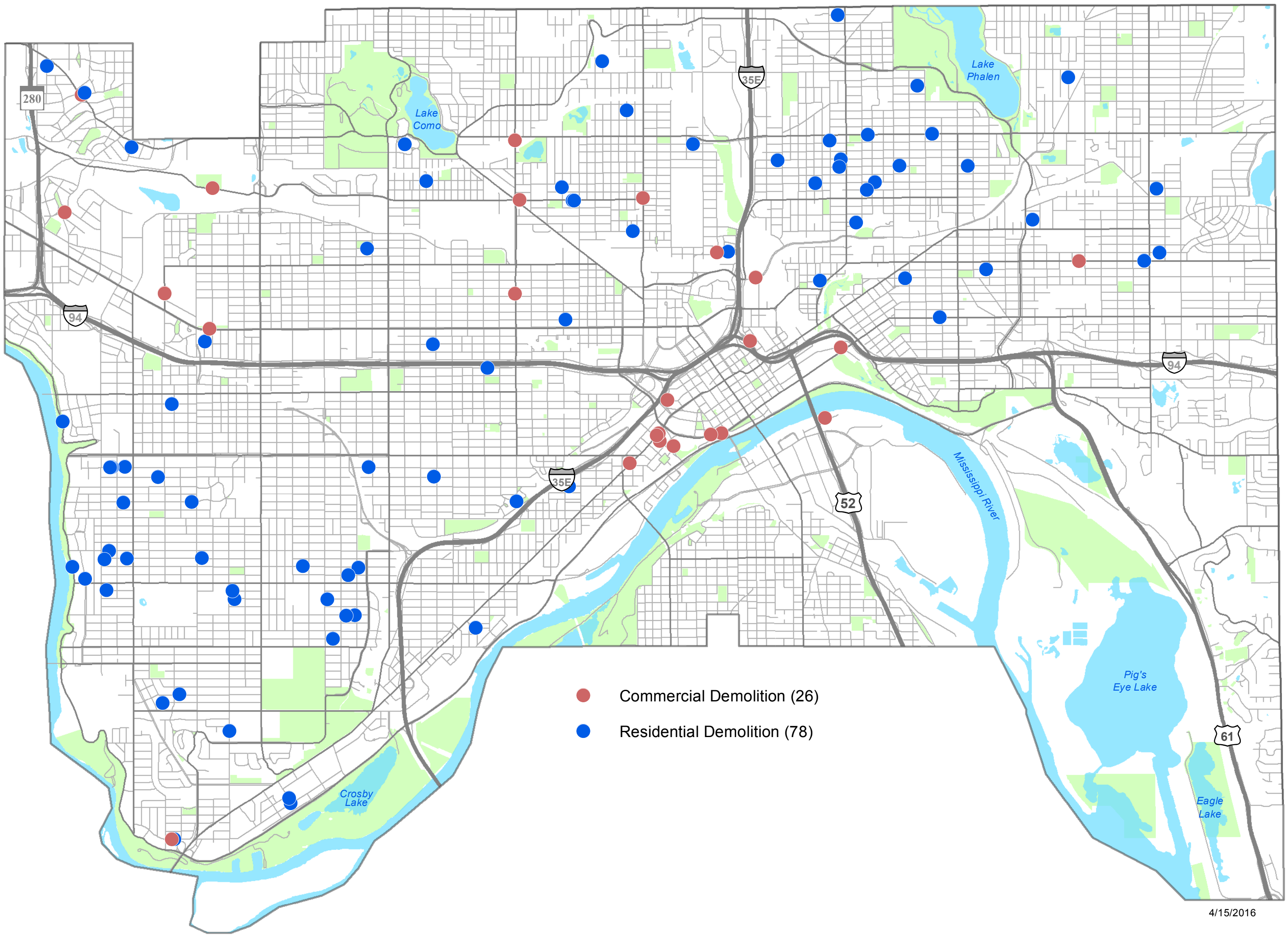
The data in Table 9 includes all four types of demolitions reported by the Department of Safety and Inspections: (1) Residential, (2) Residential Accessory Structures, (3) Commercial, and (4) Commercial Accessory Structures. Figure 7 shows only the 104 demolition permits for Residential and Commercial properties, and excludes all demolition permits for accessory structures.

Table 9 - Number of demolitions per year 2009 - 2015

Year	2009	2010	2011	2012	2013	2014	2015
Commercial	36	37	51	36	32	30	29
Residential	176	151	262	199	151	143	162
Total Demolitions	**212**	**188**	**313**	**235**	**183**	**173**	**191**

Source: Saint Paul Department of Safety and Inspections, compiled by Saint Paul Planning and Economic Development.

Figure 7 - Locations of building demolitions, 2015



Source: Saint Paul Department of Safety and Inspections, mapped by Saint Paul Planning and Economic Development.

Foreclosure rates continued to fall in 2015 following significant decreases since the peak in 2008. 2015 was the first year since the recession with fewer than 500 foreclosures in the city. Figure 8 illustrates the past and current trends of foreclosures in Saint Paul: the foreclosure rate has decreased since mid-2010. Figure 9 on the next page illustrates the locations of foreclosures in 2015. These foreclosed properties are spread throughout the city, but are more densely concentrated in northeastern parts of the city, in the West Side neighborhood (south of the Mississippi River), north of University Avenue, and the West Seventh neighborhood. Highland Park and Macalester-Grovelend in southwestern Saint Paul continue to experience relatively few foreclosures.

Figure 8 - Foreclosure tally, rolling annual average, 2008-2015

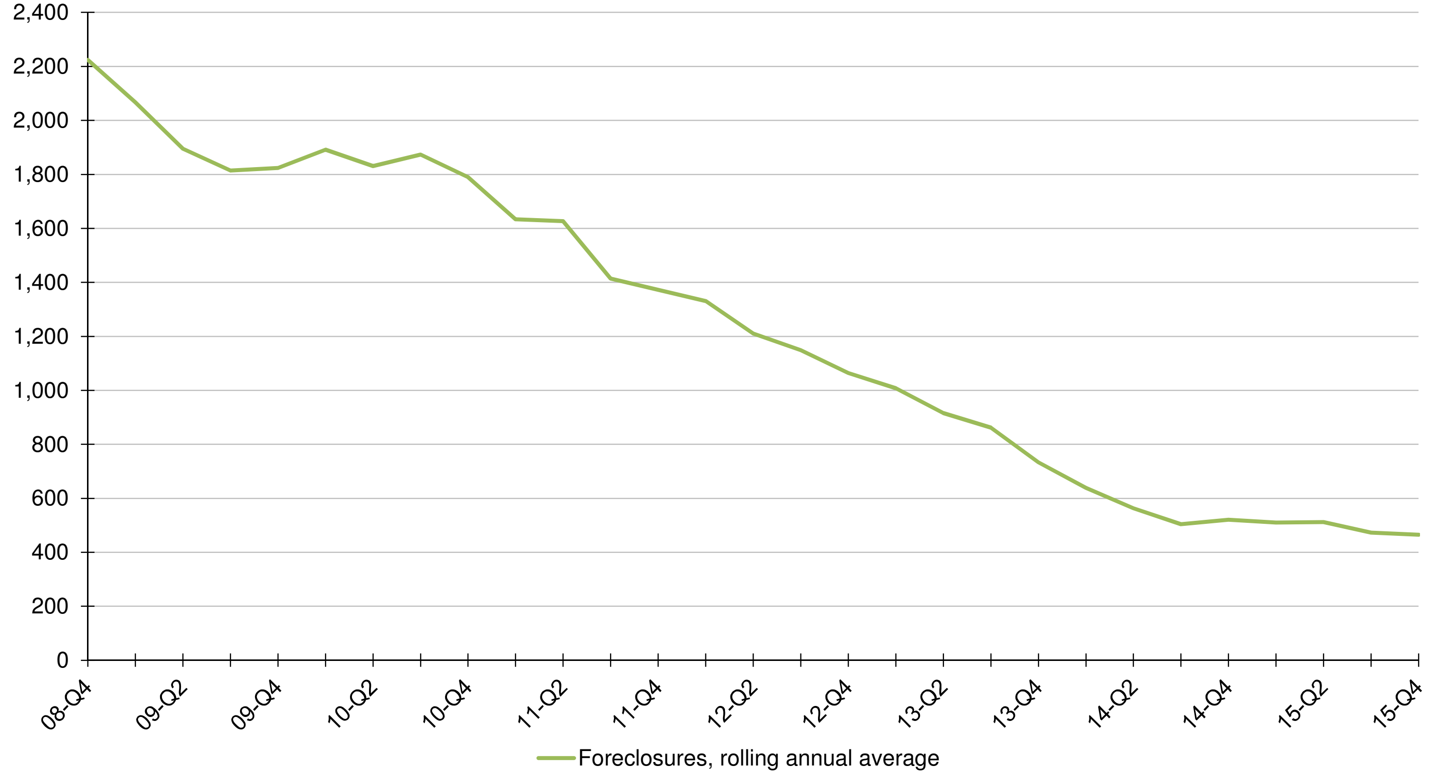
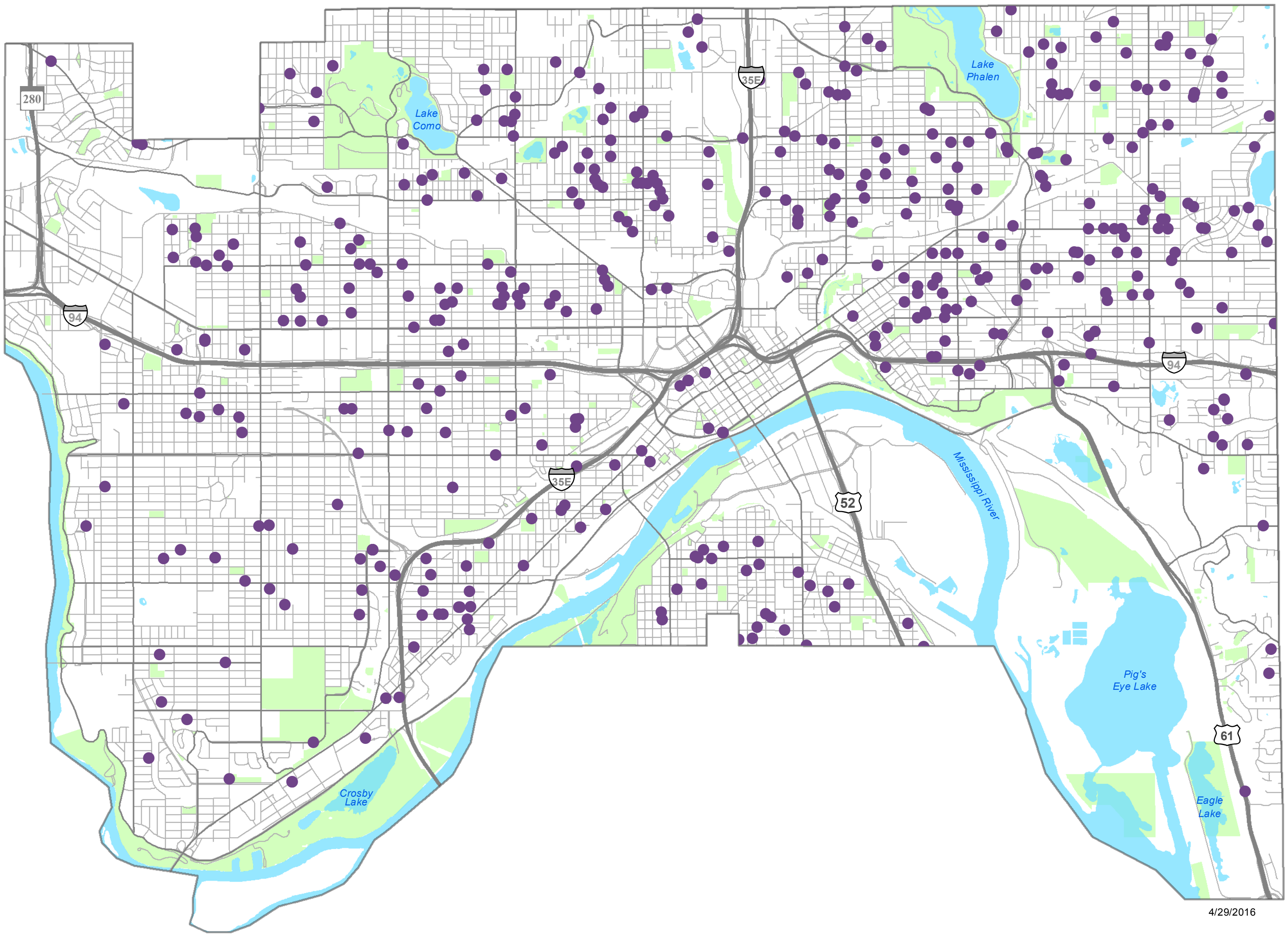


Table 10 - Total number of foreclosures - 2008-2015

Year	2008	2009	2010	2011	2012	2013	2014	2015
Foreclosures	2,224	1,824	1,790	1,372	1,064	733	521	465

Sources: Ramsey County Sheriff's Office, data compiled by Saint Paul Planning and Economic Development.

Figure 9 - Locations of foreclosed properties, 2015



Source: Ramsey County Sheriff's Office, mapped by Saint Paul Planning and Economic Development.

The number of registered vacant buildings in Saint Paul fell by 51% between 2009 and 2015. Because data limitations prevent City staff from collecting highly accurate point-in-time tallies for vacant buildings, the data presented below may not be completely precise. Figure 11 on the next page shows the location of vacant buildings in Saint Paul as of December 31, 2015. The map indicates some concentrations of vacant buildings north of Interstate 94, mostly clustered on either side of Interstate 35E. Smaller concentrations of vacant buildings are shown in the West Seventh and West Side neighborhoods. The Inspiring Communities program is one effort by the Saint Paul Housing and Redevelopment Authority designed to reduce the number of vacant and underutilized buildings, and spur additional investment in these neighborhoods.

Figure 10 - Number of Registered Vacant Buildings

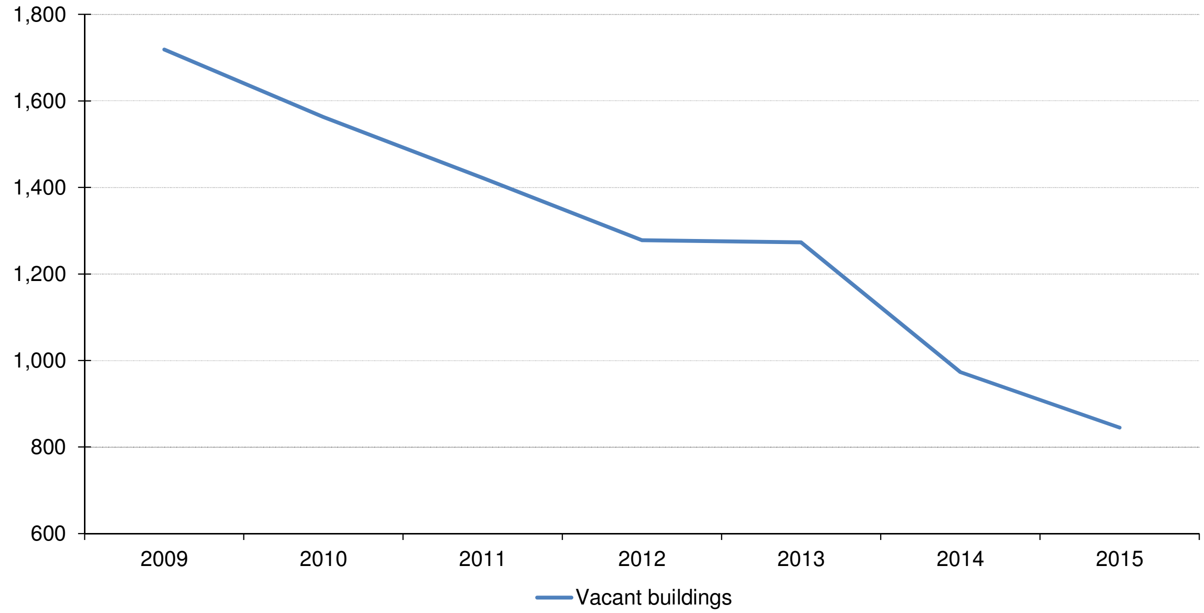


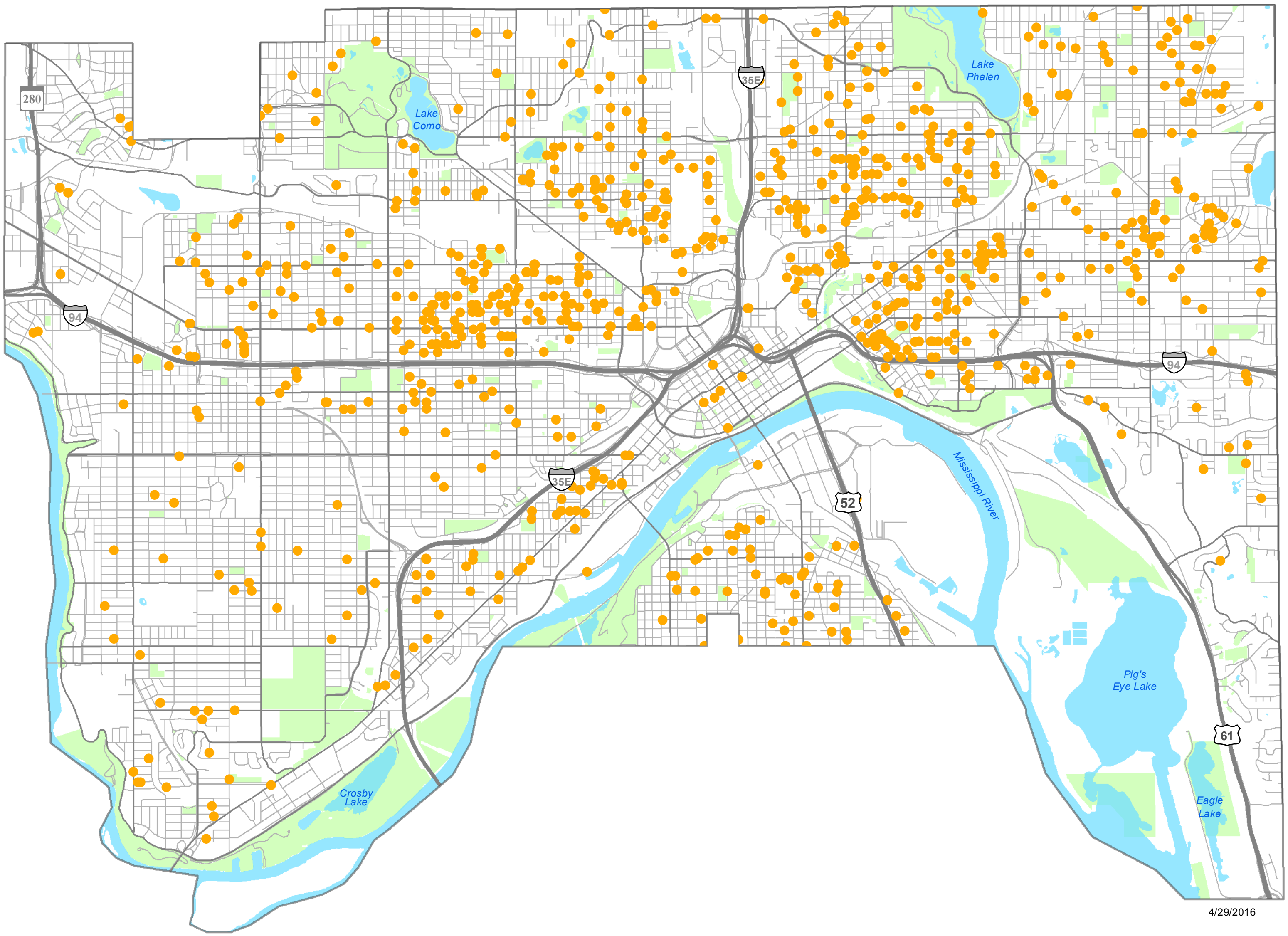
Table 11 - Total number of Vacant Buildings - 2009-2015

Year	2009	2010	2011	2012	2013	2014	2015	Change 2009-2015
Number of Vacant Buildings	1,719	1,563	1,422	1,278	1,273	973	845	-873 (-51%)

Note: The City of Saint Paul has ordinances regulating vacant and unoccupied structures, and requires property owners to register these buildings with the Department of Safety and Inspections. A Registered Vacant Building is defined as an unoccupied building that meets one or more of the following criteria: unsecured; secured by other than normal means; a dangerous structure; condemned; has multiple housing or building code violations; condemned and illegally occupied; or has been unoccupied for a period of time longer than one year, during which time an enforcement officer has issued an order to correct nuisance conditions.

Source: Saint Paul Department of Safety and Inspections, data compiled by Saint Paul Planning and Economic Development.

Figure 11 - Locations of vacant buildings, 2015



Source: Saint Paul Department of Safety and Inspections, mapped by Saint Paul Planning and Economic Development.

Employment is measured as the number of Saint Paul residents who are currently employed, regardless of whether those residents work in Saint Paul or in another city. This is different from the analysis of jobs on the following pages, which measures the number of people who work in the city, regardless of where they live. In the past year, employment in Saint Paul has continued to grow. In the fourth quarter of 2015, nearly 3,000 more residents were employed than at the same time last year.

Table 12 - Labor force, employment, and unemployment

	14-Q4	15-Q1	15-Q2	15-Q3	15-Q4
Saint Paul - Not seasonally adjusted					
Labor Force	150,532	152,317	154,891	154,738	153,160
Employment	145,471	146,053	148,810	148,739	148,319
Unemployment Rate	3.4%	4.1%	3.9%	3.9%	3.2%
Metro - Not seasonally adjusted					
Labor Force	1,716,443	1,639,637	1,664,591	1,661,645	1,647,940
Employment	1,663,861	1,576,660	1,606,398	1,605,620	1,601,282
Unemployment Rate	3.1%	3.8%	3.5%	3.4%	2.8%
Saint Paul - Rolling Annual Average*					
Labor Force	148,798	150,130	151,753	153,120	153,777
Employment	142,223	143,905	145,718	147,268	147,980
Unemployment Rate	4.4%	4.1%	4.0%	3.8%	3.8%
Metro - Rolling Annual Average					
Labor Force	1,699,727	1,702,734	1,707,856	1,670,579	1,653,453
Employment	1,634,519	1,640,690	1,646,838	1,613,135	1,597,490
Unemployment Rate	3.8%	3.6%	3.6%	3.4%	3.4%

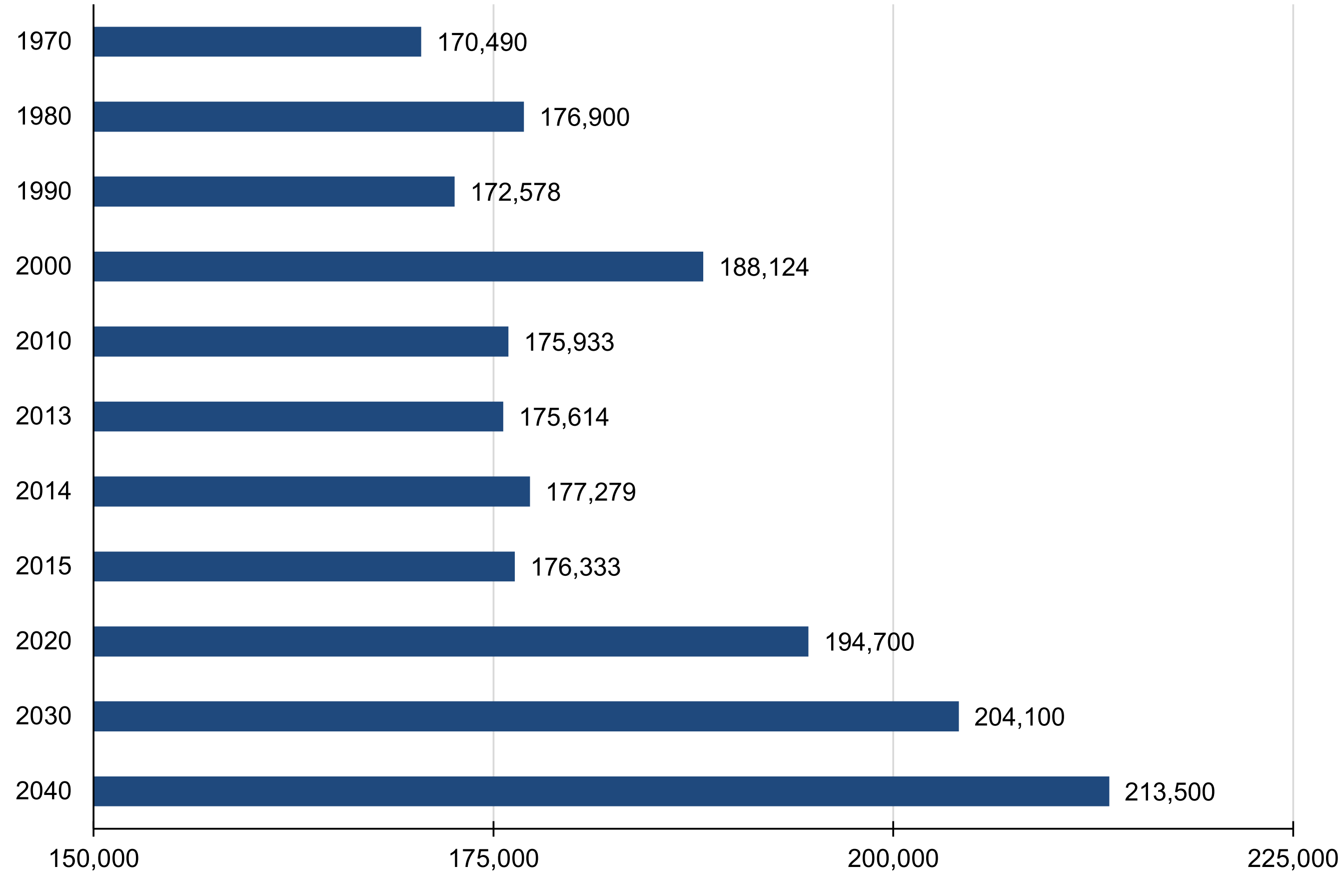
*Although seasonally adjusted data is not available for Saint Paul, the rolling average of the past 12 months of employment data helps to account for seasonal fluctuation in employment. For example, the rolling average unemployment rate for Saint Paul in 15-Q2 is 4.0%, which means that the average unemployment rate for the period of 14-Q3 to 15-Q2 is 4.0%.

Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development.

Employment Forecasts

The number of employed residents in Saint Paul is the total number of city residents who are employed regardless of the location of their job. The current total number of employed residents in Saint Paul is estimated to be 176,333—slightly fewer than last year. While employment has remained steady after dropping from the city's peak in 2000, the Metropolitan Council estimates that Saint Paul will surpass that peak number by 2020. The Metropolitan Council's forecasts predict that Saint Paul will add more than 27,000 jobs by 2030 (16% growth).

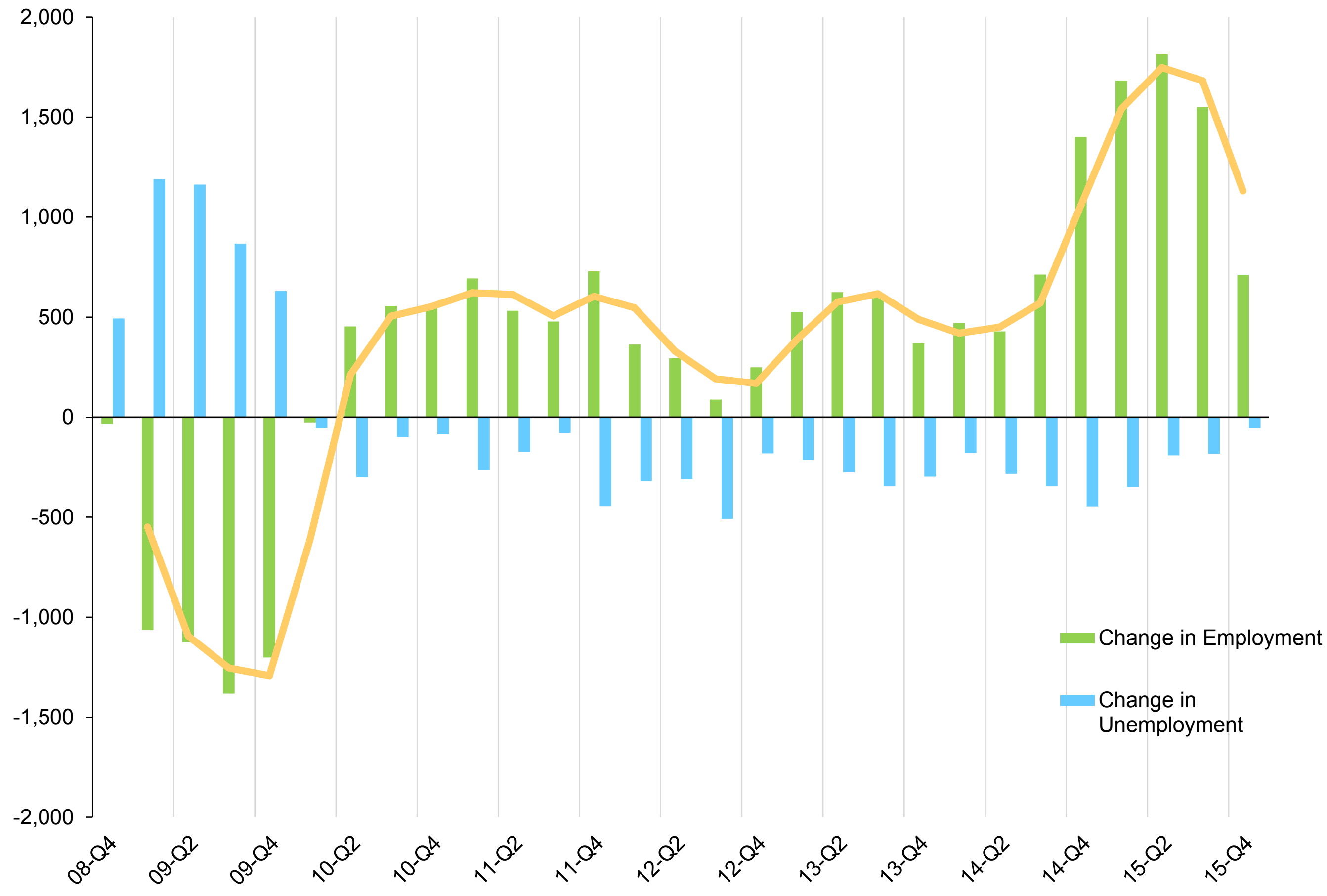
Figure 12 - Employed residents in Saint Paul and forecasted changes



Source: Historic data for 1970 through 2010 from the Metropolitan Council; 2014 and 2015 data based on 2nd quarter DEED QCEW estimates; forecasted population data for 2020 through 2040 from the Metropolitan Council's 2040 adopted forecasts.

The labor force is the total number of residents in Saint Paul who are either employed, or unemployed and actively seeking employment. Figure 13 shows steady employment growth since 2010, making up for large losses experienced during the height of the recession in 2008. The graph also shows that employment rose rapidly and then fell over the course of 2015. However, current employment is still higher than at any time since 2008.

Figure 13 - Changes in Saint Paul employment, unemployment, and labor force trend line*

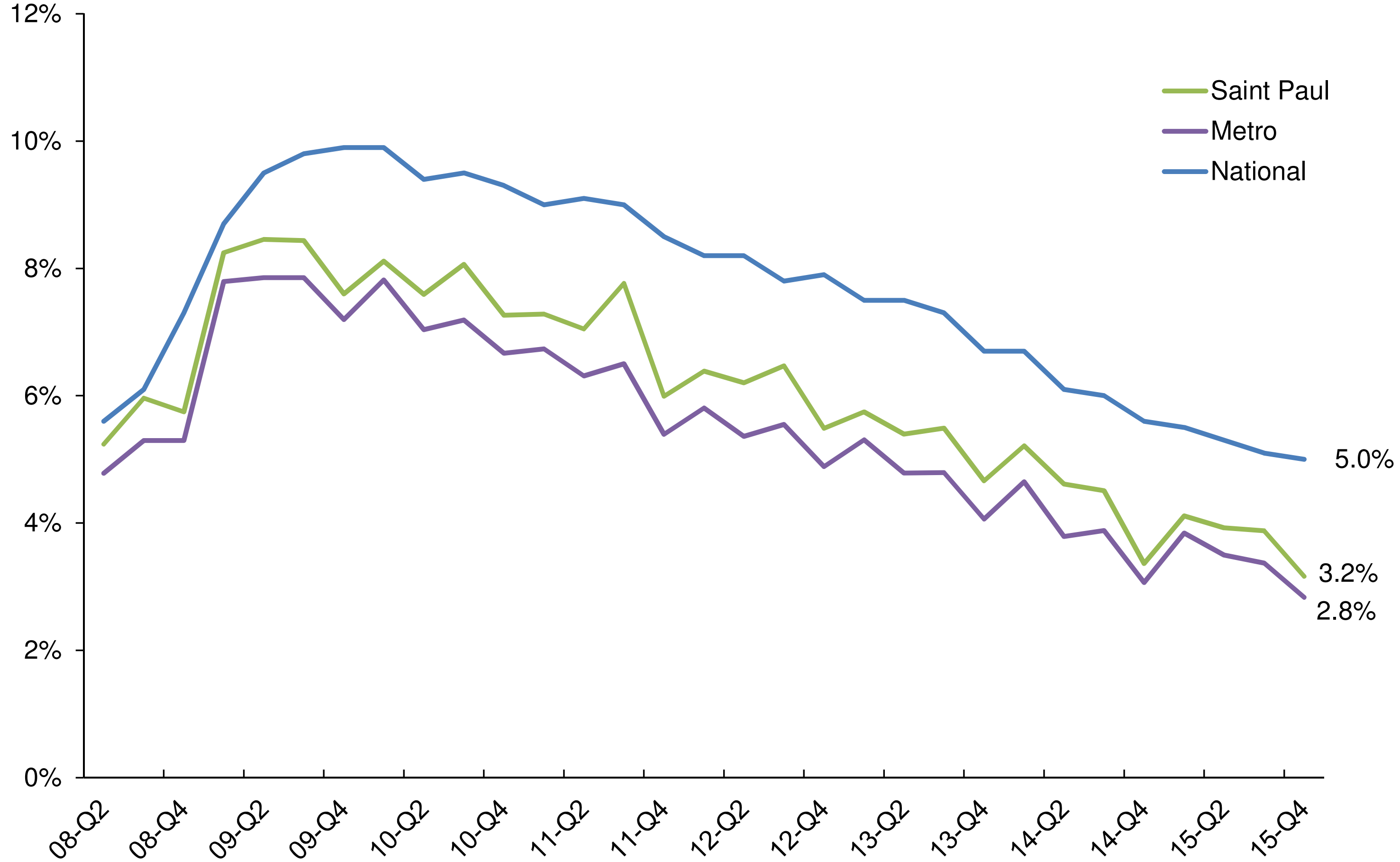


*Changes in the labor force are based on a rolling annual average.

Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development.

Saint Paul's unemployment rate continues to improve steadily. Figure 14 shows an unemployment rate of 3.2% for the fourth quarter of 2015, compared with 3.4% one year prior. Metro area unemployment showed a similar trend to Saint Paul, dropping from 3.1% for 14-Q4 to 2.8% in 15-Q4.

Figure 14 - Unemployment rate, not seasonally adjusted



Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development.

Table 13 shows the total number of jobs located within the city of Saint Paul. The table also details job trends for private and government sector jobs. Small seasonal fluctuations are evident in the data presented below. These figures do not necessarily reflect long-term changes in the city's economy, but instead show how local job availability changes from season to season.

Table 13 - All jobs in Saint Paul, 2014-2015

	'14-Q3	'14-Q4	'15-Q1	'15-Q2	'15-Q3
Total Jobs in Saint Paul	177,140	179,754	176,272	180,042	179,897
Private Jobs	142,233	142,992	139,525	142,948	144,419
Change from Prev Qtr	2,221	759	-3,467	3,423	1,471
Total Government Jobs	34,906	36,762	36,747	37,093	35,478
Change from Prev Qtr	-2,092	1,856	-15	346	-1,615
Local Government Jobs*	14,519	16,194	16,162	16,566	14,919
Change from Prev Qtr	-3,223	1,675	-32	404	-1,647
State Government Jobs	17,698	17,843	17,863	17,786	17,802
Change from Prev Qtr	1,169	145	20	-77	16
Federal Government Jobs	2,688	2,724	2,721	2,741	2,756
Change from Prev Qtr	-38	36	-3	20	15

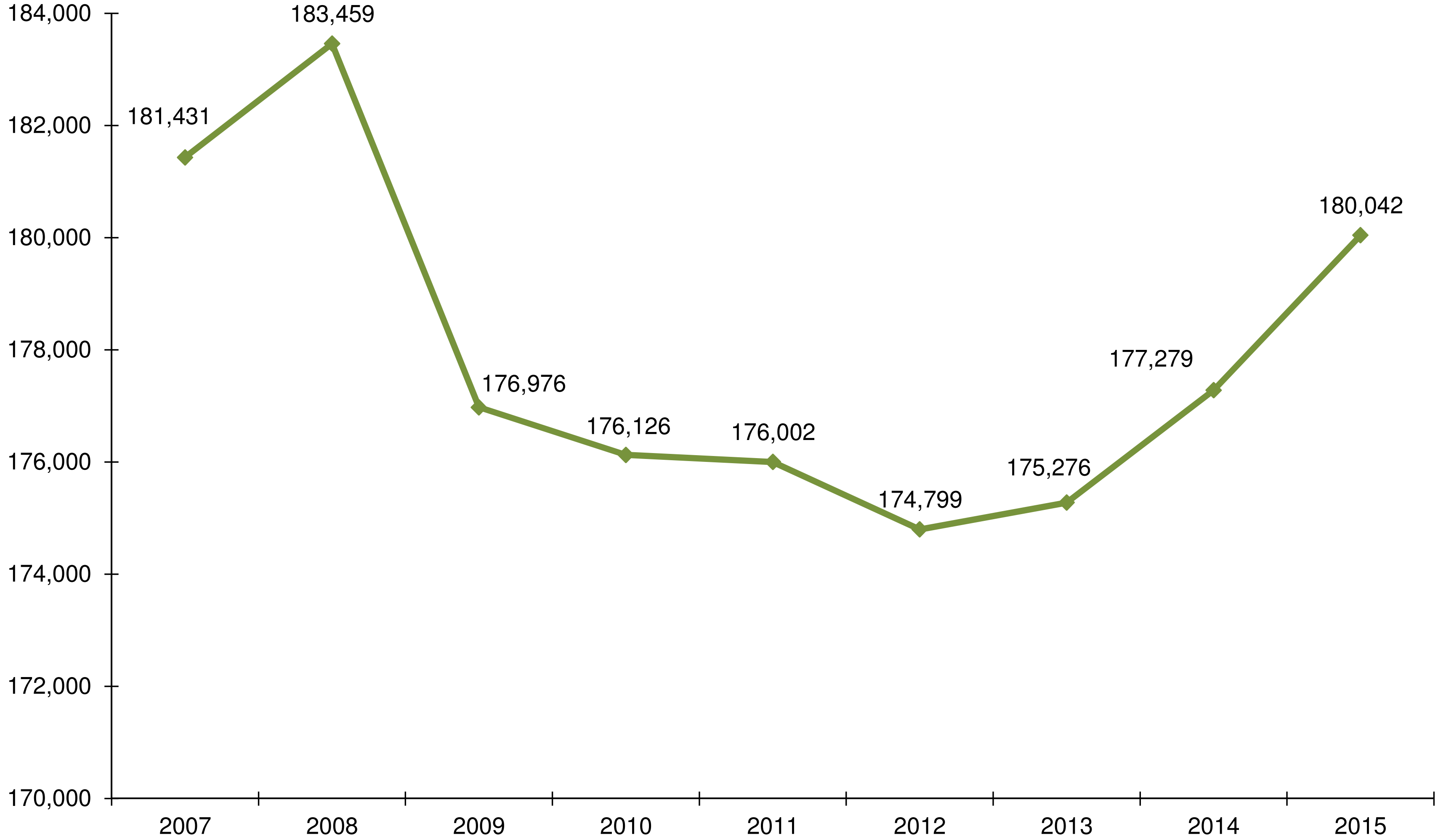
*Local Government includes city, county, and school district employees. There is a yearly pattern of decreases in employment numbers between quarters 2 and 3 due to the transition out of temporary summer employees.

Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development.

Annual Job Trends

Figure 15 shows the total number of jobs located in Saint Paul for the years 2007-2015. The graph shows a large drop in job totals between 2008 and 2009, reflecting the worst downward trend of the recession. Since then, job totals have stabilized and have rebounded significantly through 2015.

Figure 15 - All jobs in Saint Paul, 2007-2015



Jobs indicates the number of positions within the city of St. Paul, regardless of which city the employee lives in. Total jobs statistics are based on second quarter estimates, which tend to be relatively predictive of the annual average.

Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development.

The tables below compare the number of jobs in the city, broken down by public and private sector. The most recent data show modest increases in private jobs and a very small increase in government sector jobs. The private sector gained more than 2,000 jobs from 2014 to 2015, while the government sector remained steady and gained 95 jobs.

Table 14 - Changes in private and government sector jobs, 14-Q2 to 15-Q2

	Numerical Change	Percent Change
Total, All Sectors	2,763	1.56%
Private Sector	2,667	1.90%
Government Sector	95	0.26%

Table 15 - Change in jobs by type of government, 14-Q2 to 15-Q2

	Numerical Change	Percent Change
Federal Government	15	0.55%
State Government	44	0.25%
Local Government*	37	0.22%

*Local Government includes city, county, and school district employees.

Sector employment statistics are based on second quarter estimates, which tend to be relatively predictive of the annual average.

Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development.

Sectors that gained the most jobs

Over the five year period from 2011 to 2015, nine industry sectors experienced growth. Growth rates larger than 6% can be categorized as steady to significant while growth rates below 6% can be categorized as modest. The Construction and Professional, Scientific, and Technical Services sectors grew significantly over the five years, suggesting a continued rebound from the recession in those industries. The growth in construction jobs also matches the continued increases in building permits. Growth in the Health Care and Social Assistance sector continues the trend of strong growth reported in previous issues of Market Watch.

Table 16 - Employment totals by industry sector, and changes 2011-2015

Industry Sector	2011	2012	2013	2014	2015	% Change '11-'15
Construction	4,324	4,025	4,656	5,268	5,586	29.2%
Professional, Scientific, and Technical Services	6,832	7,100	7,039	7,876	7,788	14.0%
Health Care and Social Assistance	38,822	38,944	40,569	41,328	42,887	10.5%
Wholesale Trade	4,873	4,831	4,883	5,144	5,341	9.6%
Public Administration	21,875	21,802	22,157	22,888	23,111	5.7%
Retail Trade	9,216	9,303	9,600	9,642	9,732	5.6%
Accommodation and Food Services	11,291	10,230	10,781	11,287	11,823	4.7%
Educational Services	17,463	17,717	18,394	18,022	18,075	3.5%
Utilities	906	878	955	944	923	1.9%

Employment statistics for the Construction sector are based on second quarter estimates of a summation of total employment within the Construction-related subsectors reported (Construction of Buildings, Specialty Trade Contractors, and Heavy and Civil Engineering Construction) as sector totals are not available for every year detailed in Table 16. All other estimates are based on second quarter estimates for the sector listed. Second quarter estimates tend to be relatively predictive of the annual average.

See Appendix 1 for Industry Sector definitions.

Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development

Sectors that lost the most jobs

The sectors in the following table are those that showed the greatest reduction in jobs over the past five years. Table 17 reveals that employment numbers in some sectors, including arts, entertainment, finance, and insurance, appear to fluctuate frequently during the five year period. This suggests that recent losses may not necessarily reflect long-term trends.

Table 17 - Employment totals by industry sector, and changes 2011-2015

Industry Sector	2011	2012	2013	2014	2015	% Change '11-'15
Administrative and Support and Waste Management and Remediation Services	11,341	11,424	9,300	8,828	8,761	-22.9%
Transportation and Warehousing	3,656	3,859	3,347	3,300	3,277	-10.4%
Real Estate and Rental and Leasing	2,669	2,505	2,430	2,393	2,407	-9.8%
Manufacturing	8,412	7,869	7,626	7,837	7,923	-5.8%
Management of Companies and Enterprises	4,361	4,665	4,156	4,091	4,161	-4.6%
Arts, Entertainment, and Recreation	4,285	4,192	3,893	4,069	4,153	-3.1%
Other Services (except Public Administration)	6,584	6,676	6,595	6,726	6,445	-1.4%
Finance and Insurance	12,343	12,142	12,355	12,344	12,239	-0.8%

Employment estimates are based on second quarter estimates for the sector listed. Second quarter estimates tend to be relatively predictive of the annual average.

See Appendix 1 for Industry Sector definitions.

Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development.

Average Weekly Wages

The average weekly wage in Saint Paul during the second quarter of 2015 was $1,060, an increase of $28 since 2014. This indicates that wages in the city are relatively stable. Figure 16 shows that this trend is fairly consistent with state and metro-level changes over the past year. The graph also shows a general trend of wage increases since early 2012.

Figure 16 - Average weekly wages, 2009-2015 (2015 $)

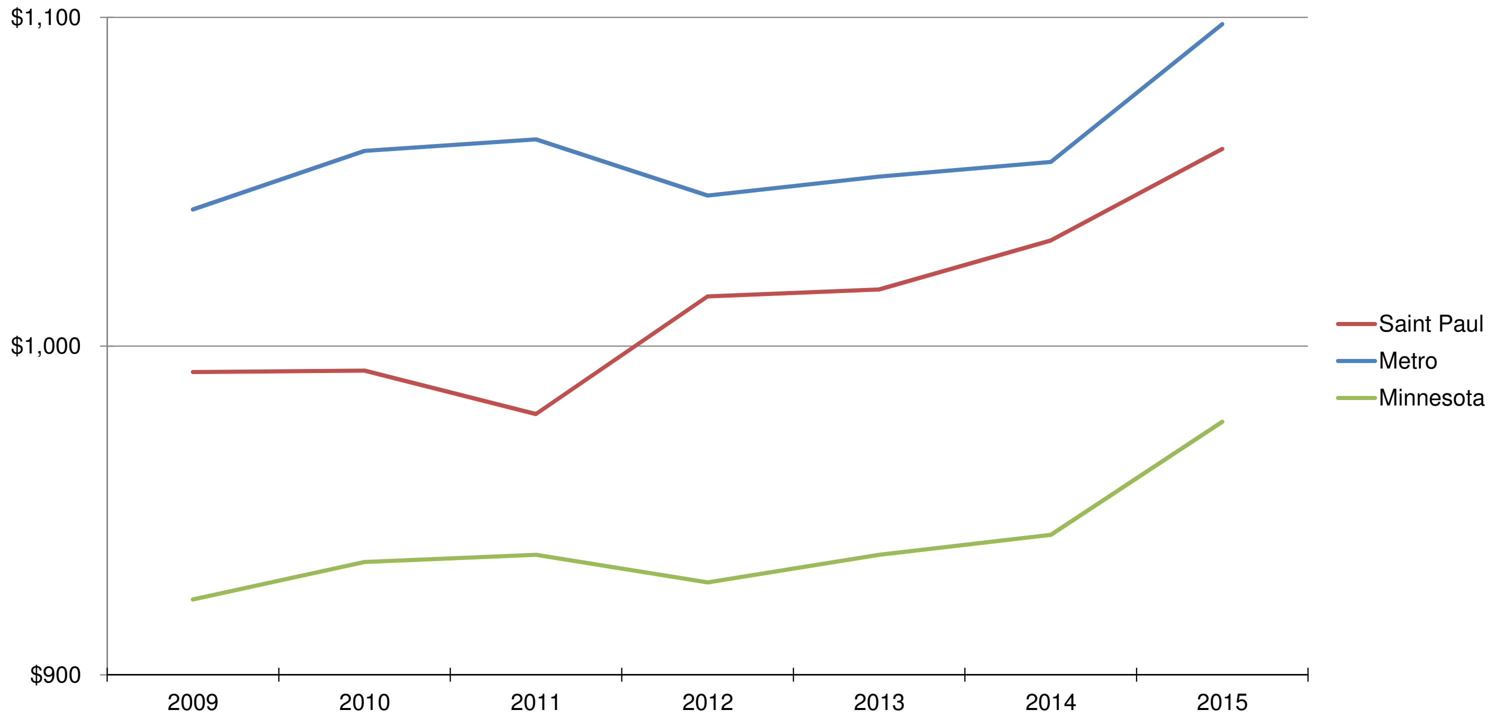


Table 18 - Average weekly wages, 2009-2015 (2015 $)

Average Weekly Wages								Change in Wages	
Year	2009	2010	2011	2012	2013	2014	2015	2009-2015	2014-2015
Saint Paul	$992	$993	$979	$1,015	$1,017	$1,032	$1,060	+$68	+$28
Metro	$1,042	$1,059	$1,063	$1,046	$1,052	$1,056	$1,098	+$56	+$42
Minnesota	$923	$934	$937	$928	$937	$943	$977	+$54	+$34

Weekly wages are based on the second quarter averages for each year, which tend to be representarive of trends. Inflation is calculated according to 2nd-half 2015 CPI-U, U.S. Bureau of Labor Statistics.

Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development.

Saint Paul employees saw mixed changes in wages in the sectors that reported wage data for 2014 and 2015. Overall, weekly wages increased by an average of $28. Major changes according to industry sector are summarized below. Wages in Saint Paul declined in four sectors: Construction; Management of Companies and Enterprises; Manufacturing; and Other Services (except Public Administration). Wage decreases may be correlated with increases in hiring*. Weekly wage data for some industry sectors were suppressed, and thus are not included in the table below.

Table 19 - Average weekly wages by industry sector, 2014-2015 (2015 $)

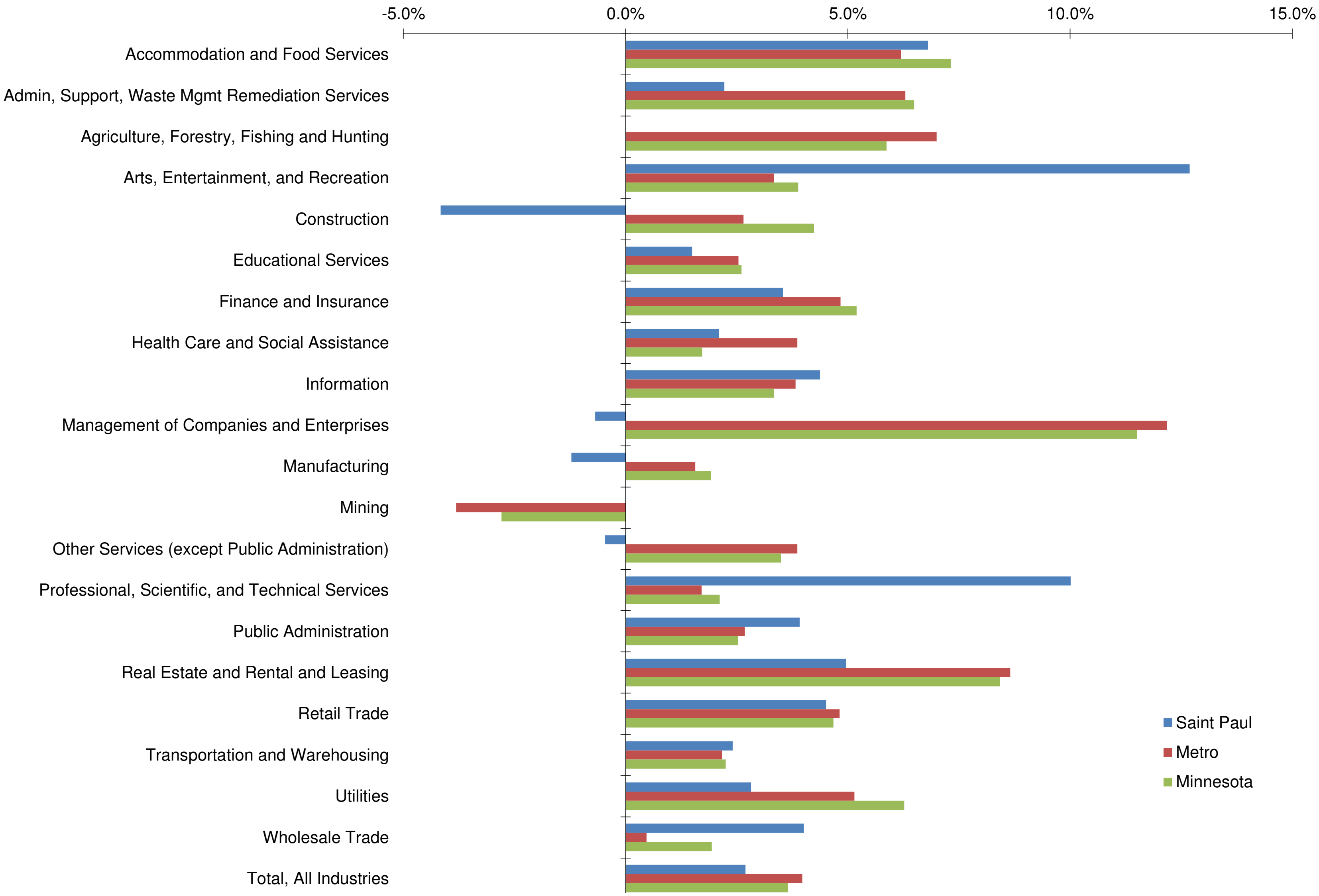
Industry Group	2014	2015	Change 14-Q2 to15-Q2	% Change 14-Q2 to 15-Q2
Accommodation and Food Services	$347	$371	$24	6.8%
Admin Support, Waste Mgmt, Remediation	$515	$526	$11	2.2%
Arts, Entertainment, and Recreation	$704	$793	$89	12.7%
Construction	$1,425	$1,366	-$59	-4.2%
Educational Services	$1,073	$1,089	$16	1.5%
Finance and Insurance	$1,565	$1,620	$55	3.5%
Health Care and Social Assistance	$921	$940	$19	2.1%
Information	$1,255	$1,310	$55	4.4%
Management of Companies and Enterprises	$1,907	$1,894	-$13	-0.7%
Manufacturing	$1,301	$1,285	-$16	-1.2%
Other Services (except Public Administration)	$749	$746	-$3	-0.5%
Professional, Scientific, and Technical Services	$1,446	$1,591	$145	10.0%
Public Administration	$1,248	$1,297	$49	3.9%
Real Estate and Rental and Leasing	$802	$842	$40	5.0%
Retail Trade	$520	$543	$23	4.5%
Transportation and Warehousing	$929	$951	$22	2.4%
Utilities	$1,915	$1,969	$54	2.8%
Wholesale Trade	$1,159	$1,205	$46	4.0%
Total, All Industries	$1,032	$1,060	$28	2.7%

*When new employees are hired for entry-level positions and replace higher-wage retirees, the average wage for that sector may go down.

Source: Minnesota Department of Employment and Economic Development, compiled by Saint Paul Planning and Economic Development.

The figure below graphically compares changes in wages by industry sector in Saint Paul, the Twin Cities Metropolitan Area, and Minnesota as a whole. Actual wages are reported in Table 19 on the previous page.

Figure 17 - Percent change in wages by industry, 14-Q2 TO 15-Q2 (2015 $)

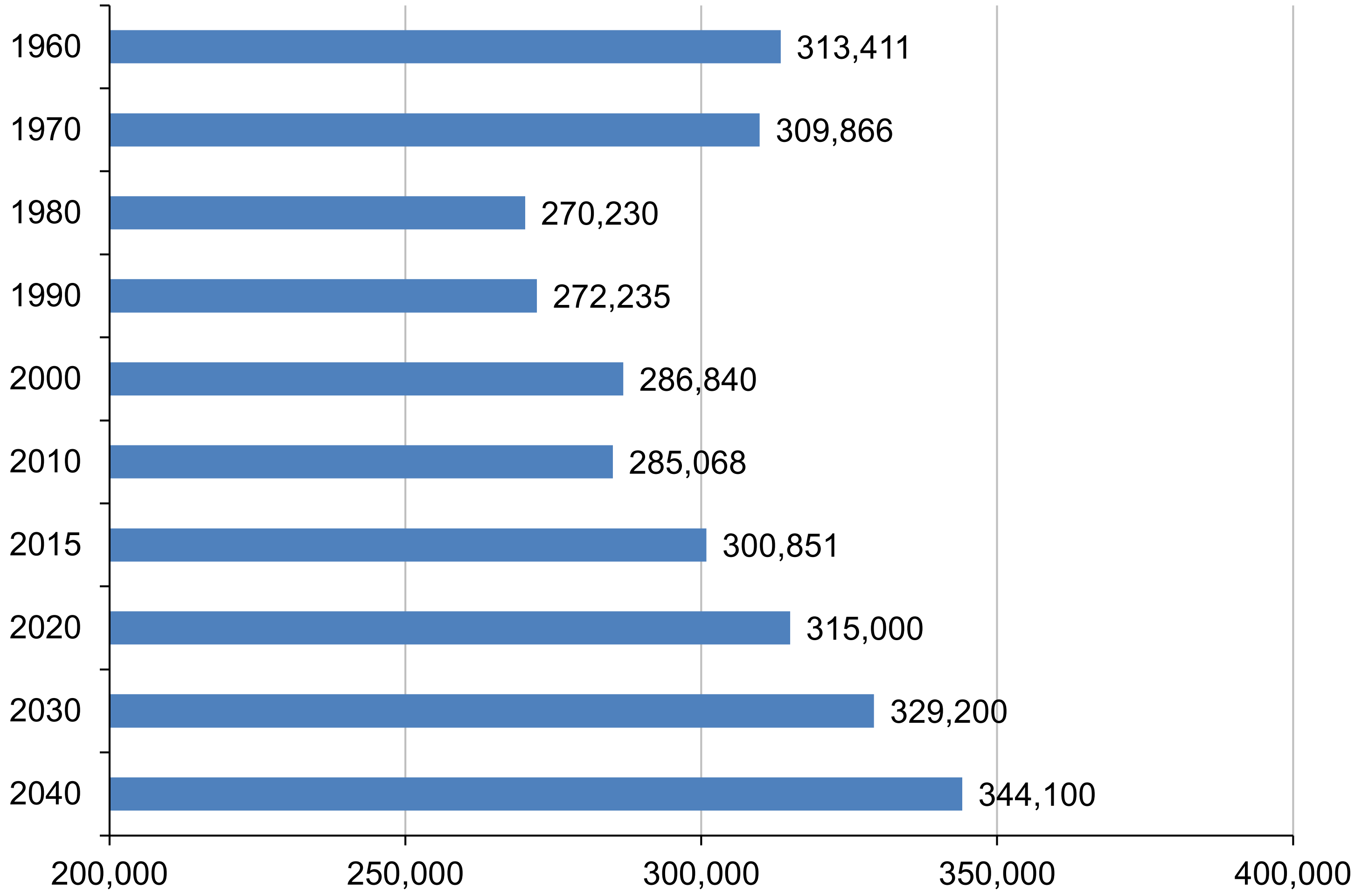


While wages in construction declined in St. Paul between 2014 and 2015, workers in the city were still making more than their metro area and statewide counterparts. Even after the deline in 2015, construction workers in St. Paul made $1,366 per week on average compared to $1,223 and $1,107 per week for workers in the metro area and larger state, respectively.

Source: Minnesota Department of Employment and Economic Development - Quarterly Census of Employment and Wages.

The Metropolitan Council's forecasts indicate that Saint Paul will gain approximately 50,000 residents (18% increase) by 2040.The most recent available estimate of the city's population is 300,353, representing an estimated increase of more than 15,000 residents since 2010.
Continued population growth is consistent with this recent trend and future growth is expected to surpass the city's historical population peak of 313,000 residents in 1960.

Figure 18 - Saint Paul population and forecasted changes



Source: Historic population counts from U.S. Census Bureau Decennial Census; 2015 population from U.S. Census Bureau, Population Estimates Program; Forecasted population data from the Metropolitan Council's 2040 adopted forecasts.

Table 20 summarizes population estimates by age during two non-overlapping American Community Survey 5-year estimates. Changes for key population groups are summarized and displayed in a graph on the next page.

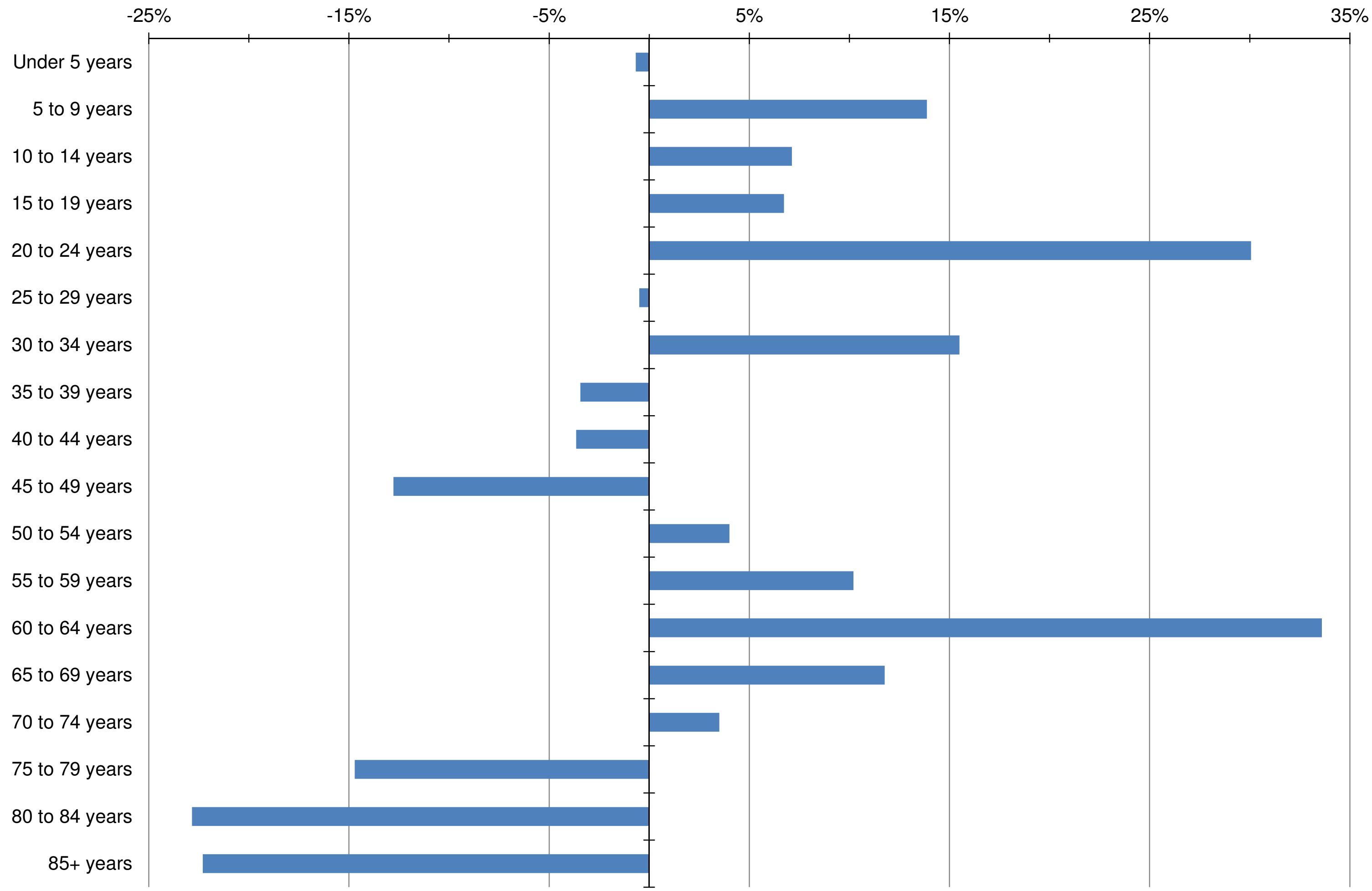
Table 20 - Population by age, Saint Paul, 2005-2009 and 2010-2014

Age Group	'05-'09	'10-'14	% Change '05-'09 to '10-'14
Under 5 years	22,543	22,392	-0.67%
5 to 9 years	17,941	20,429	+13.87%
10 to 14 years	18,085	19,375	+7.13%
15 to 19 years	20,966	21,867	+4.30%
20 to 24 years	10,935	11,527	+5.41%
25 to 29 years	27,381	27,245	-0.50%
30 to 34 years	20,463	23,635	+15.50%
35 to 39 years	19,158	18,499	-3.44%
40 to 44 years	18,051	17,392	-3.65%
45 to 49 years	19,413	16,933	-12.77%
50 to 54 years	17,887	18,604	+4.01%
55 to 59 years	15,214	16,766	+10.20%
60 to 64 years	9,748	14,246	+46.14%
65 to 69 years	6,811	8,386	+23.12%
70 to 74 years	5,709	5,909	+3.50%
75 to 79 years	5,037	4,296	-14.71%
80 to 84 years	4,593	3,544	-22.84%
85+ years	5,188	4,031	-22.30%
Total Population	**278,342**	**291,728**	**+4.81%**

Source: U.S. Census Bureau, 2005-2009 and 2010-2014 American Community Survey 5-Year Estimates. The American Community Survey is a random sample survey of residents used to produce estimates on a more frequent basis than the Decennial Census.

Some key trends of note are the increasing population between the ages of 50 and 74 (increase of 8,542 residents), as well as increases in the population aged 20 to 34 (increase of 7,061 residents). During this time period, Saint Paul also saw a decline in the population of residents between 35 and 49 years old, and over 75 years of age.

Figure 19 - Changes in age cohorts, 2005-2009 to 2010-2014

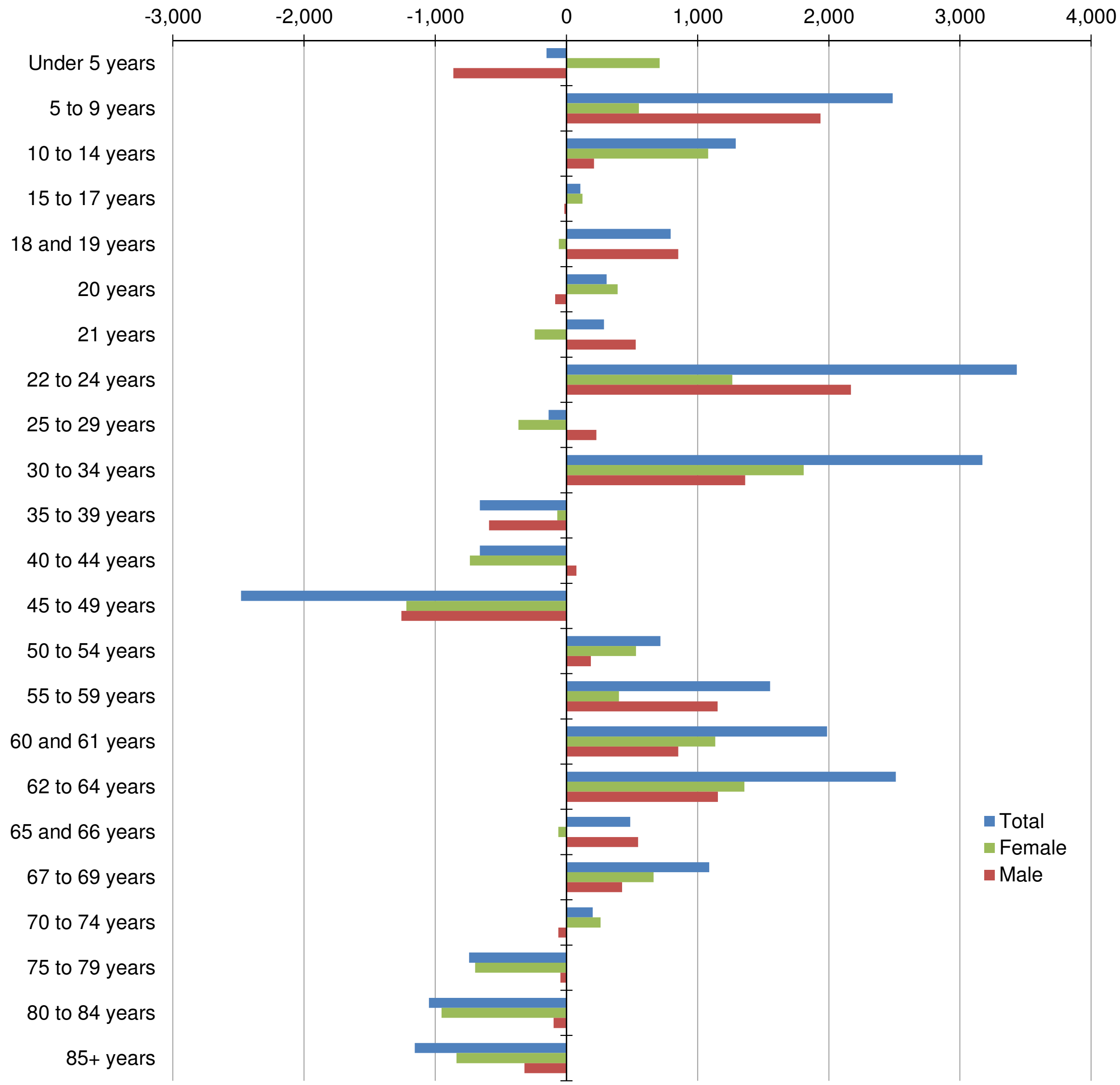


Source: U.S. Census Bureau, 2005-2009 and 2010-2014 American Community Survey 5-Year Estimates

Population by Age and Sex

This table illustrates the changes in age cohorts by sex. Most of the decrease in the population 70 years old and older were female (likely due to the higher proportion of females who live to be older than 70, compared to males). In contrast, males accounted for a majority of increases in ages 5 to 9 and ages 22 to 24. In the population under 5 years old, the number of females increased while the number of males decreased, resulting in a slight reduction in the total.

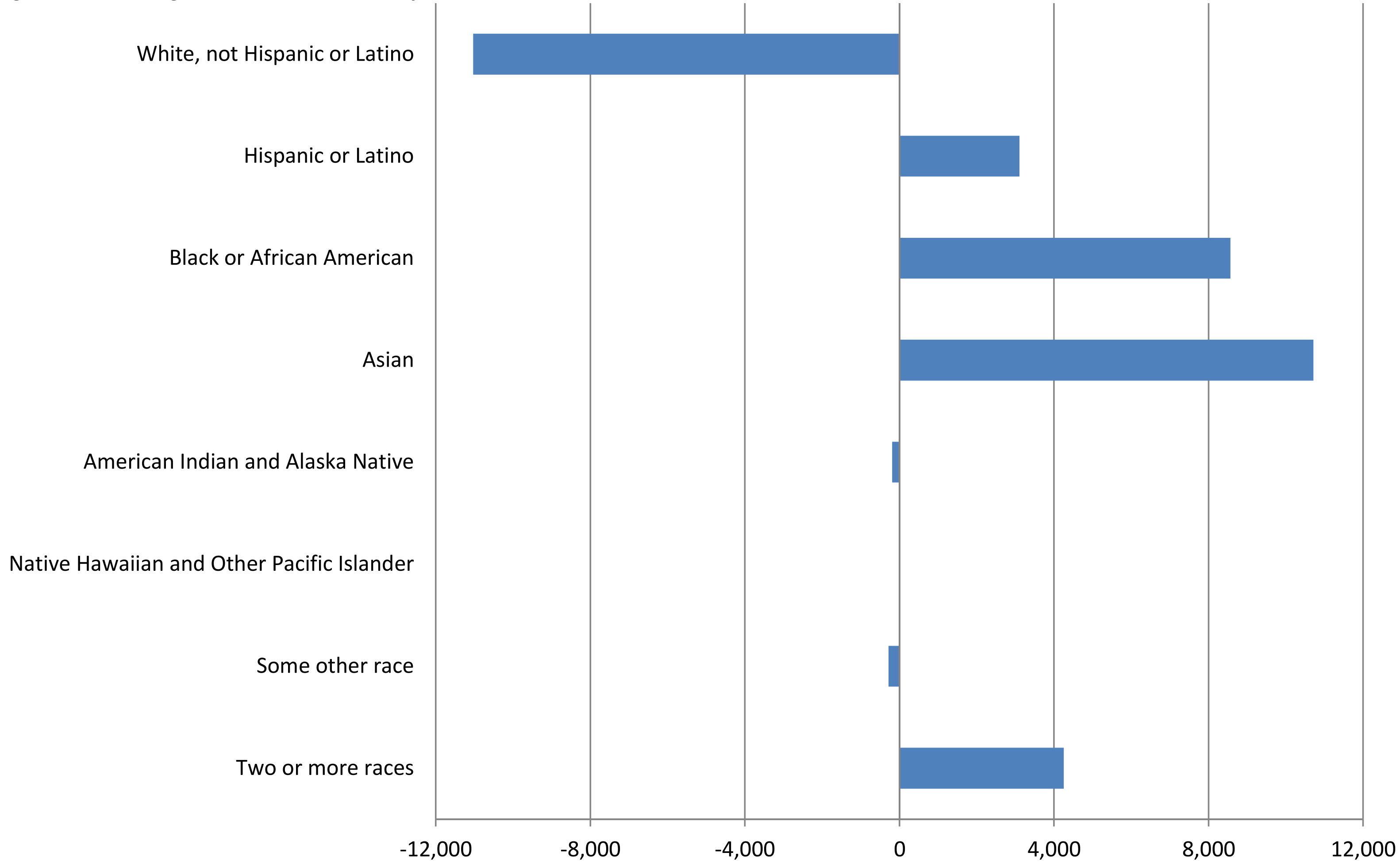
Figure 20 - Changes in age cohorts by sex, 2005-2009 to 2010-2014



Source: U.S. Census Bureau, 2005-2009 and 2010-2014 American Community Survey 5-Year Estimates

The figure below illustrates Saint Paul's changing demographics. The population of Black/African American, Hispanic, Asian, and multi-racial residents has increased, while the population of White, non-Hispanic residents decreased over the same period of time. These changes suggest that city residents are becoming increasingly diverse.

Figure 21 - Changes in race and ethnicity of Saint Paul residents, 2005-2009 to 2010-2014



Source: U.S. Census Bureau, 2005-2009 and 2010-2014 American Community Survey 5-Year Estimates

As of the release of the 2014 5-Year American Community Survey estimates, roughly 34% of the population of Saint Paul lives at or below 150% of the poverty level. The percentage of residents with incomes below 50% of the federal poverty level appears relatively stable between the time periods ‘05-‘09 and ‘10-‘14. However, the percentage of residents at every other poverty level has increased over the same time period. For reference, Table 22 lists the annual income at each poverty level for a single-person household and for a family of four.

Figure 22 - Changes in poverty rates over time

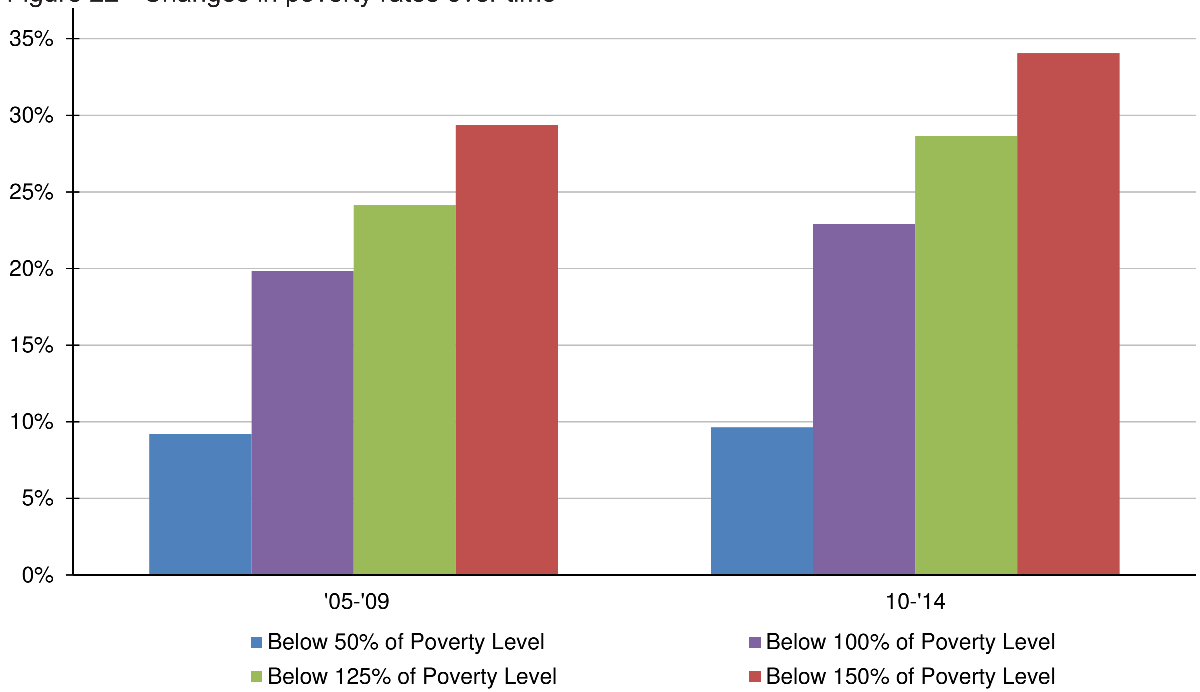


Table 21 - Saint Paul poverty rates, 2005-2009 to 2010-2014

Indicator	2005-2009	2010-2014	% Change ‘05-’09 to ‘10-‘14
Below 50% of Poverty Level	9.2%	9.6%	0.4%
Below 100% of Poverty Level	19.8%	22.9%	3.1%
Below 125% of Poverty Level	24.1%	28.6%	4.5%
Below 150% of Poverty Level	29.4%	34.0%	4.7%

Table 22 - Income at Federal Poverty Level (2014 $)

Indicator	Single person	Family of four
50% of Poverty Level	$5,835	$11,925
100% of Poverty Level	$11,670	$23,850
125% of Poverty Level	$14,588	$29,813
150% of Poverty Level	$17,505	$35,775

Source: U.S. Census Bureau, 2005-2009 and 2010-2014 American Community Survey 5-Year Estimates; US Department of Health and Human Services, Federal Register, Poverty Guidelines

The table below describes the poverty rate in different communities in Saint Paul at different points in time. The growing poverty rates in communities of color are particularly significant. Targeted policies and interventions will likely be necessary to address this issue, and to achieve the vision stated by Mayor Christopher Coleman's administration: "That Saint Paul will be a city where race does not predetermine opportunities in education, employment, housing, health and safety."

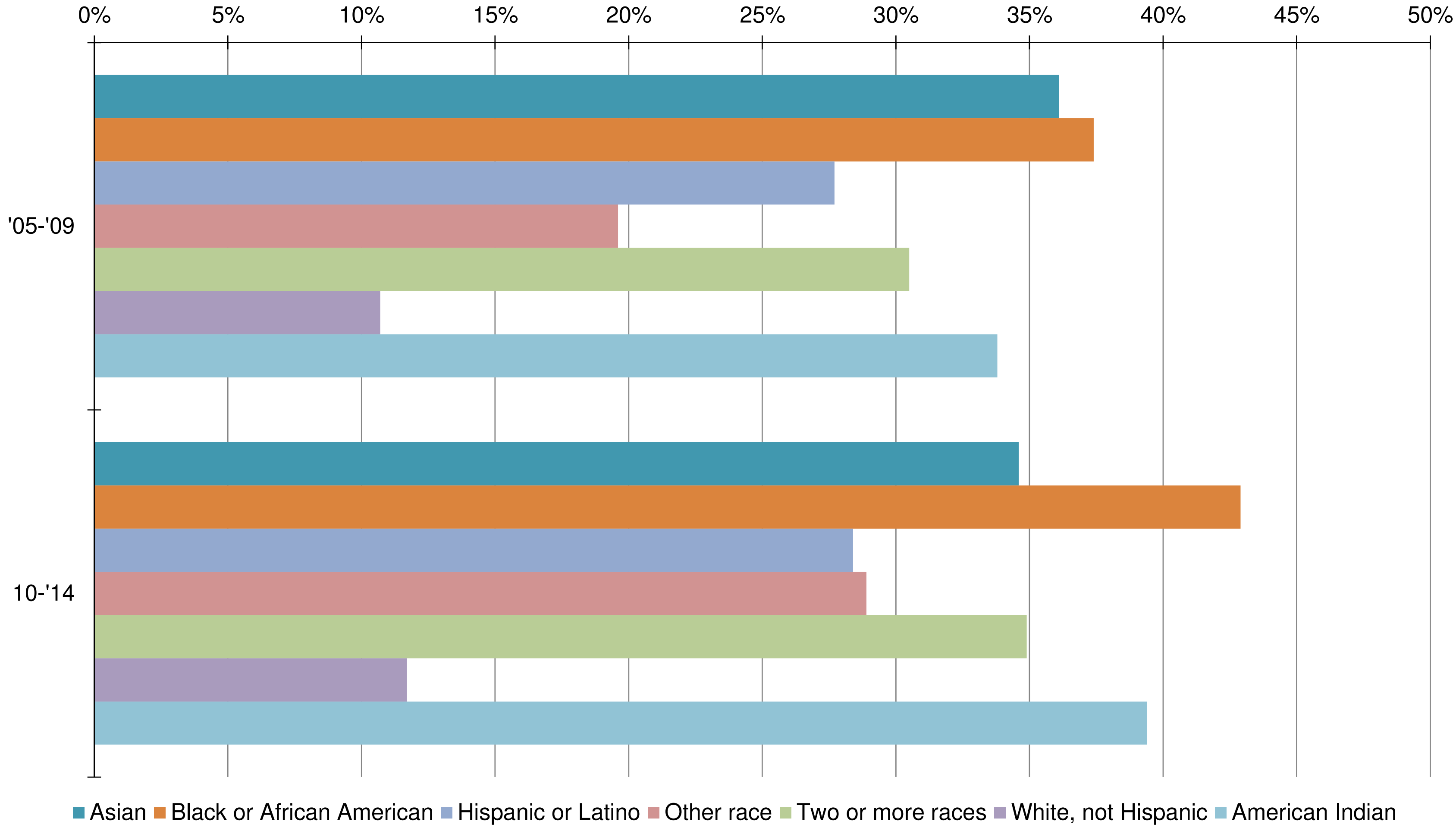
Table 23 - Saint Paul poverty rates by race over time

Race	2005 - 2009	2010 - 2014	Change '05-'09 to '09-'14
American Indian	33.8%	39.4%	+5.6%
Asian	36.1%	34.6%	-1.5%
Black or African American	37.4%	42.9%	+5.5%
Hispanic or Latino	27.7%	28.4%	+0.7%
Other race	19.6%	28.9%	+9.3%
Two or more races	30.5%	34.9%	+4.4%
White, not Hispanic	10.7%	11.7%	+1.0%

Source: U.S. Census Bureau, 2005-2009 and 2010-2014 American Community Survey 5-Year Estimates

The figure below graphically depicts the concentration of poverty in communities of color presented on the previous page. The chart shows that Saint Paul's residents of color are significantly more likely to be impoverished than white residents.

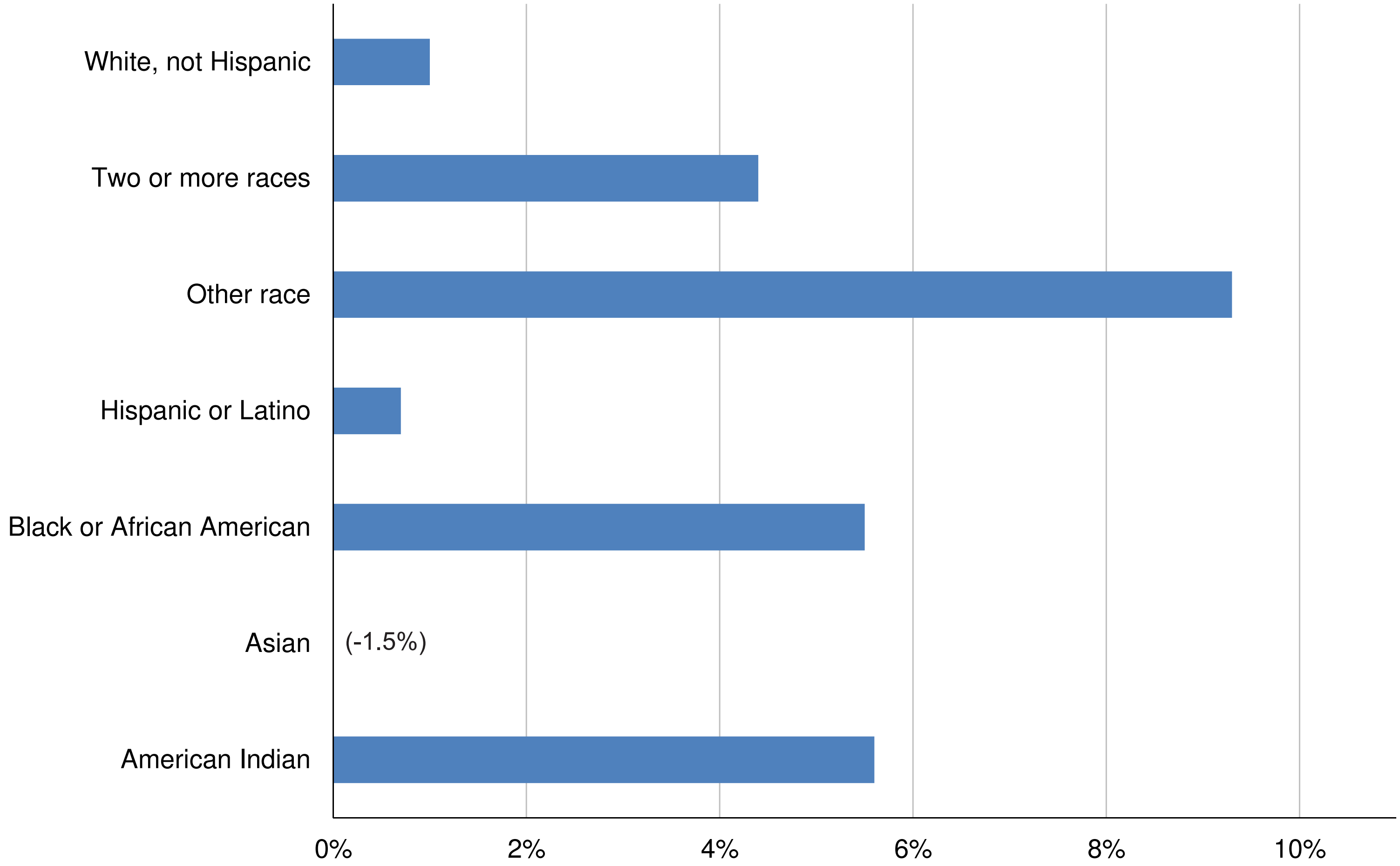
Figure 23 - Changes in poverty rates by ethnicity over time



Source: U.S. Census Bureau, 2005-2009, 2010-2014 American Community Survey 5-Year Estimates

The figure below describes the changes in poverty levels by race and ethnicity. In the past five years, poverty levels have increased significantly among communities of color, with the exception of Hispanic or Latino and Asian residents.

Figure 24 - Changes in poverty rates by ethnicity, 2005-2009 to 2010-2014



Source: U.S. Census Bureau, 2005-2009 and 2010-2014 American Community Survey 5-Year Estimates

Poverty by Age

Unfortunately, poverty is more likely to affect young residents than adults and senior citizens. This outcome is also likely associated with several other factors, including educational attainment, family size, and race/ethnicity. Regardless, future policies should attempt to prevent and remedy the imbalance of poverty in Saint Paul.

Figure 25 - Poverty rates by age

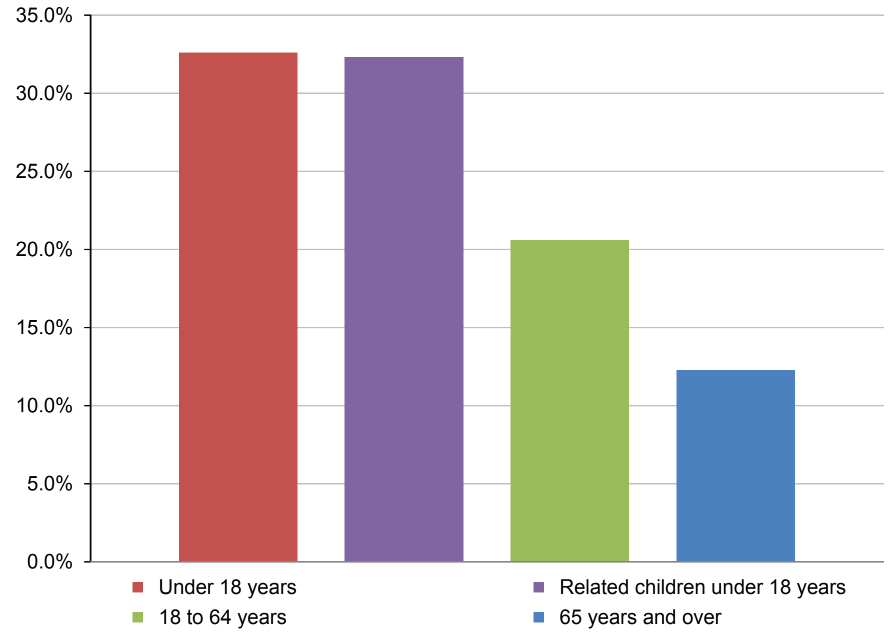


Table 24 - Poverty rates by age

AGE	Total Population	Number in Poverty	Percentage of total
Under 18 years	72,733	23,701	32.6%
Related children under 18 years	72,372	23,340	32.3%
18 to 64 years	185,957	38,317	20.6%
65 years and over	25,255	3,117	12.3%

Source: U.S. Census Bureau, 2010-2014 American Community Survey 5-Year Estimates

The percentage of residents in Saint Paul with high levels of education (Graduate/Professional and Bachelor's degrees) has increased since the 2005-2009 estimates. However, the percentage of residents with lower levels of education has also increased moderately.

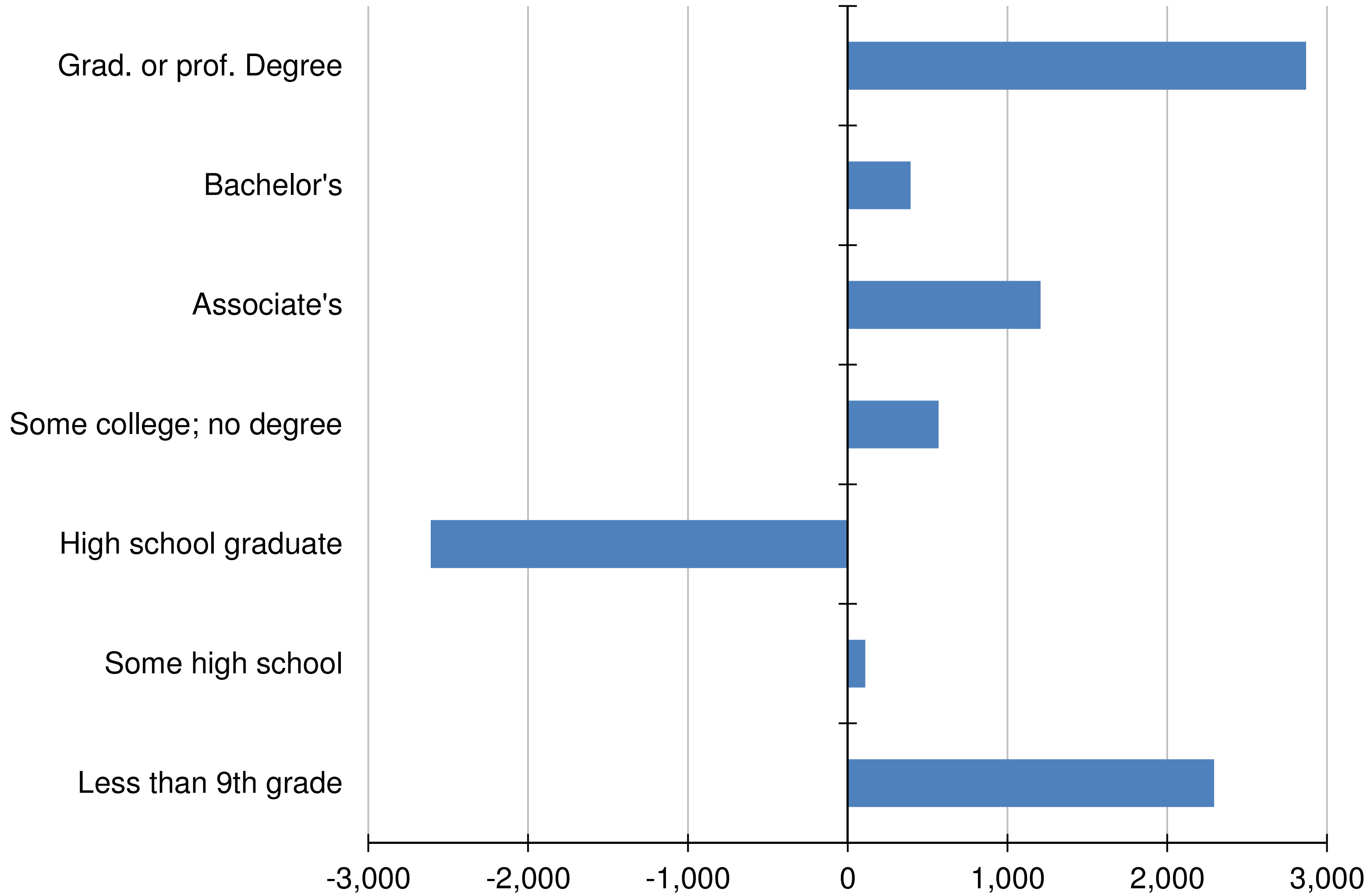
Table 25 - Educational attainment, residents older than 25 years, 2005-2009 to 2010-2014

Education Level	**'05-'09** Total (%)	**'10-'14** Total (%)
Population 25 years and over	174,653	179,486
Graduate or professional degree	25,848 (14.8%)	28,718 (16.0%)
Bachelor's degree	40,170 (23.0%)	40,564 (22.6%)
Associate's degree	11,177 (6.4%)	12,385 (6.9%)
Some college, no degree	33,533 (19.2%)	34,102 (19.0%)
High school graduate	41,916 (24.0%)	39,307 (21.9%)
Some high school, no diploma	10,479 (6.0%)	10,590 (5.9%)
No high school	11,527 (6.6%)	13,820 (7.7%)
Percent high school graduate or higher	152,646 (87.4%)	155,076 (86.4%)
Percent bachelor's degree or higher	66,018 (37.8%)	69,282 (38.6%)

Source: U.S. Census Bureau, 2005-2009 and 2010-2014 American Community Survey 5-Year Estimates

The figure below illustrates the changing number of residents at each level of education from 2005-2009 to 2010-2014. Saint Paul continues to build on its reputation as a city with a highly educated population.

Figure 26 - Change in educational attainment, residents older than 25 years, 2005-2009 to 2010-2014



Source: U.S. Census Bureau, 2005-2009 and 2010-2014 American Community Survey 5-Year Estimates

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Your suggestions, comments, or questions are welcome. Please contact Jake Reilly at jake.reilly@ci.stpaul.mn.us or 651-266-6618.

Jonathan Sage-Martinson
Department Director
jonathan.sage-martinson@ci.stpaul.mn.us
651-266-6565

Project Coordinator:
Jake Reilly
Senior Planner
jake.reilly@ci.stpaul.mn.us
651-266-6618

Research and Design:
Vincent Ferguson
Research Intern

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City of Saint Paul, Department of Planning & Economic Development (PED)
25 W. 4th St., Suite 1300 Saint Paul, MN 55102

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Department of Planning & Economic Development
25 W. 4th St., Suite 1300 Saint Paul, MN 55102