



FRAMEWORK ²⁰³⁰
partnering for the future **WORK**

Regional Factbook Briefings

VOLUME 4: **MARKET**

Thursday May 28, 2020

Framework 2030 is an initiative of the
[Central Mississippi River Regional Planning Partnership](#)

To find out more about Framework 2030, please visit:

www.RegionalPlanningPartnership.org/Framework2030

Introduction

- **The following is a briefing from the conditions and trends research for Framework 2030**
- **This presentation is part of a “deep dive” series that will focus on the regional market, interdependence, and land use and growth**

Framework 2030 and COVID-19

These are challenging times for our communities and region. We are working diligently to meet our obligations while protecting everyone. Even as we act on critical current needs, we recognize the need to work together to plan the future. With significant growth and development projected for the region, the [Central Mississippi River Regional Planning Partnership](#) recently launched [Framework 2030](#) -- a collaborative effort to develop our region's first-ever strategic land use and economic development plan.

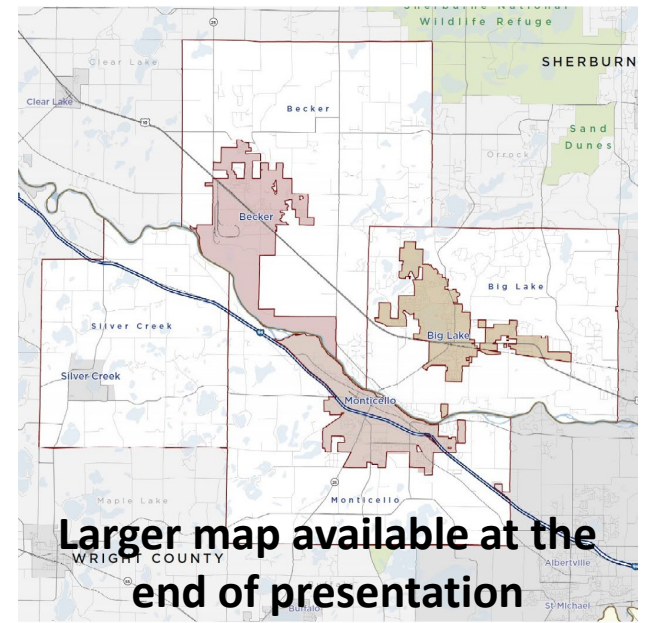
Planning Context

- **There are two research definition areas based on the available data**
- **Regional Planning Area (RPA)**
 - *Most of the available information is at the county level, so the analyses below are for Wright and Sherburne counties.*
- **Focused Planning Area (FPA)**
 - *When possible, analyses will focus on the jurisdictions that are members of the Central Mississippi River Regional Planning Partnership.*

REGIONAL PLANNING AREA



FOCUSED PLANNING AREA



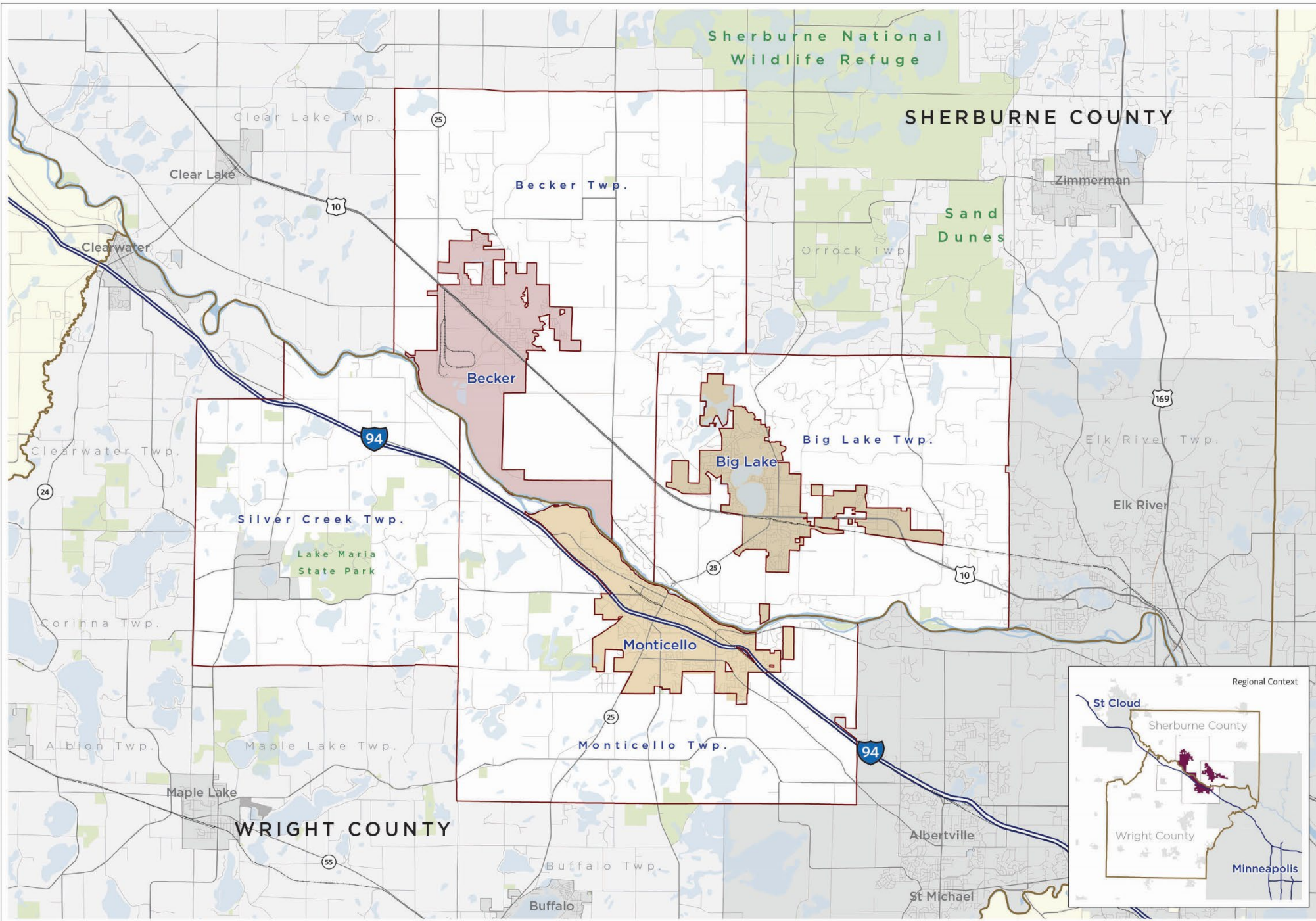
Defining the Market Area

- **The market area can be different than the geography, and typically varies for types of activities such as work, events, and certain types of shopping and dining**
- **Three ways of determining geographic market area:**
 - *Commuting*
 - *Distance / drive-times*
 - *Cell phone location data*

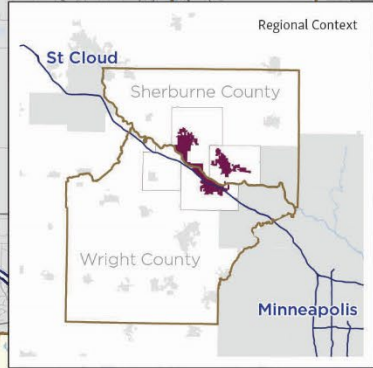
Impact of COVID-19

Understanding the geographic scope of the market area will be useful as you begin the process of economic recovery and contemplate key gateways, marketing efforts, and potential new development opportunities

Focused Planning Area



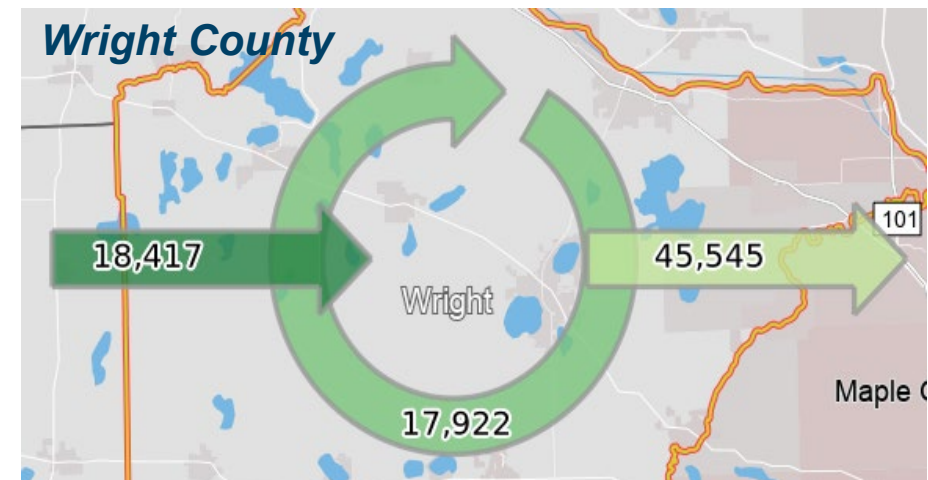
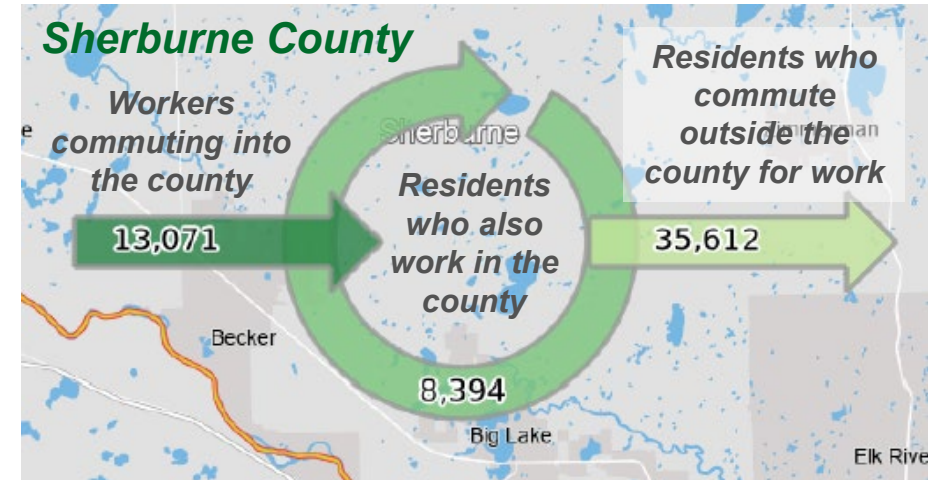
- Participating Townships
- Surrounding Counties
- Other Cities
- Park Land
- Mississippi River
- Open Water
- City of Becker
- City of Monticello
- City of Big Lake
- Interstate
- US Highway
- State Highway

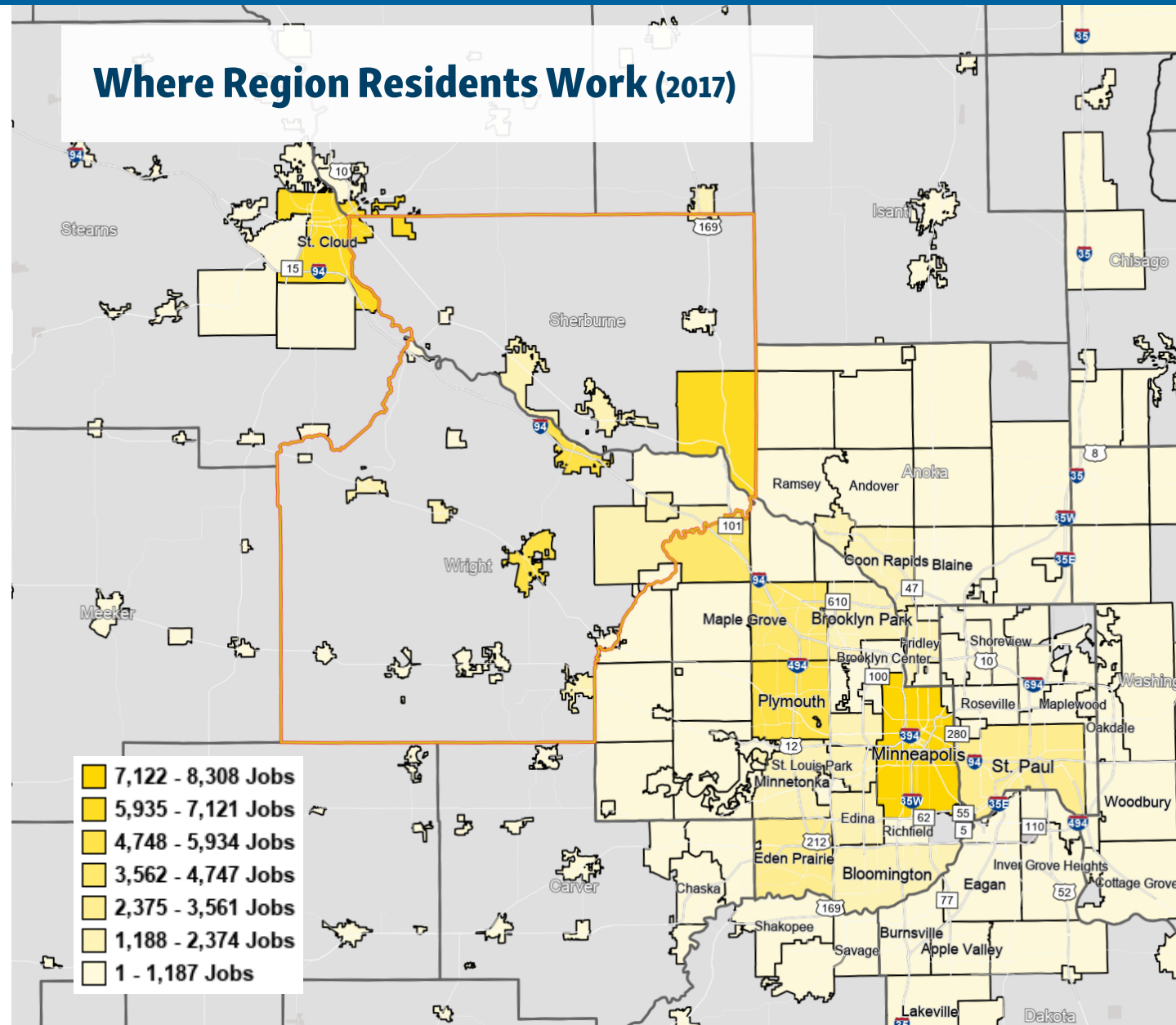
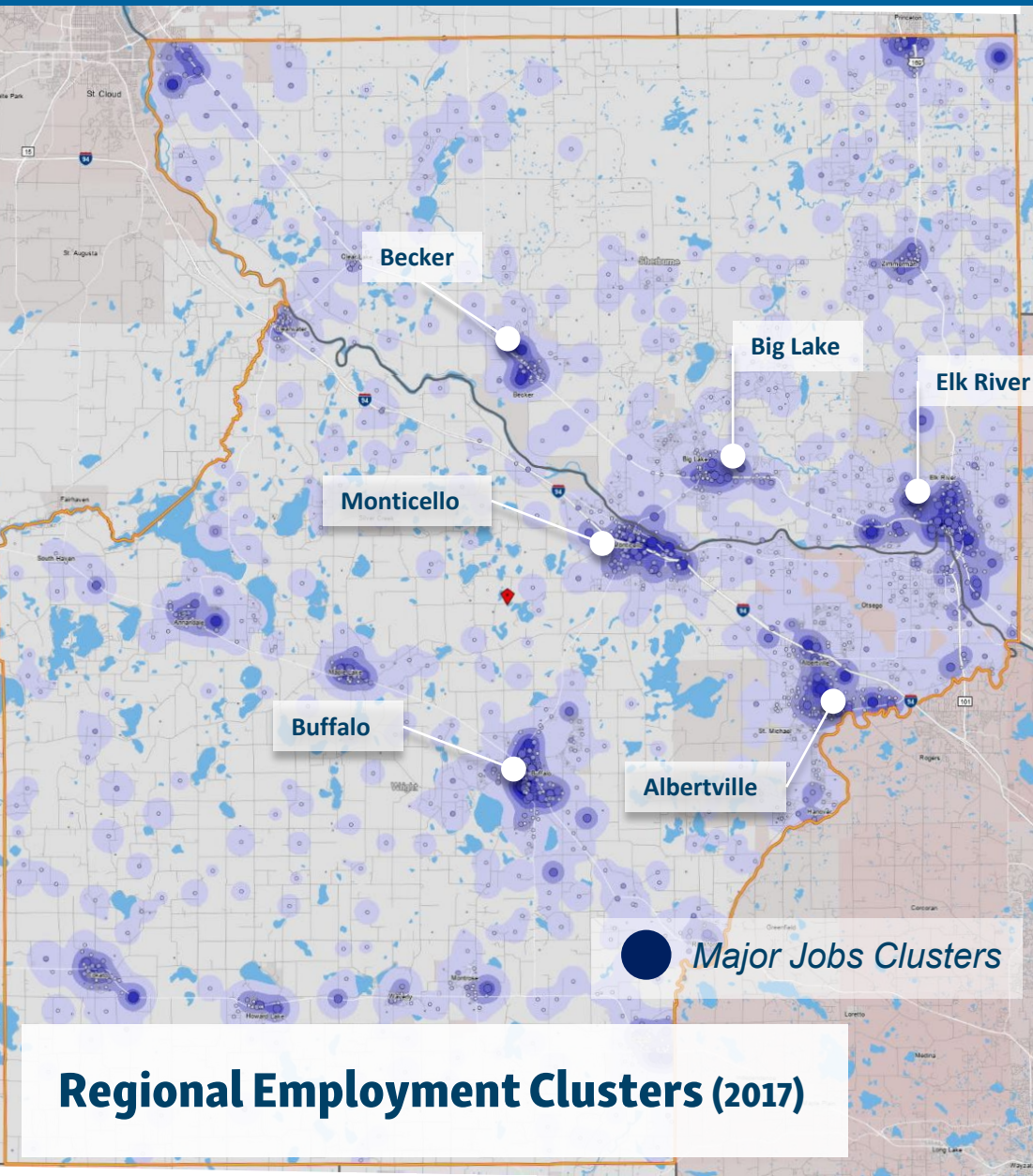


MARKET AREA | Commuter Shed

- **Most regional employees commute in from outside the region, and most regional residents commute to work outside**
- **Job growth particularly in Sherburne has been fueled largely by workers from outside the county**
- **Average commute time ~30 minutes one way, 10 minutes higher than state average**

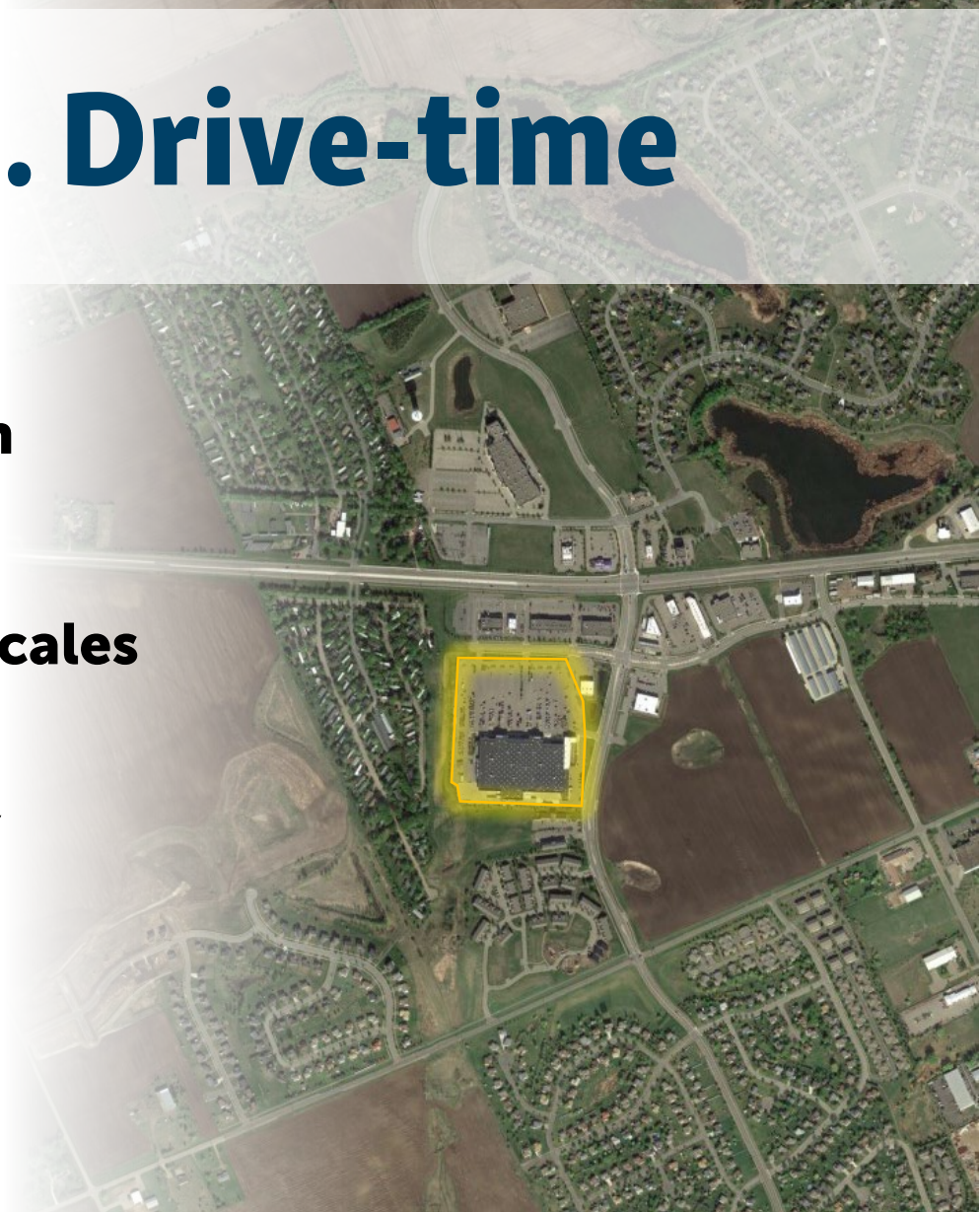
Note: The arrows do not indicate direction of movement

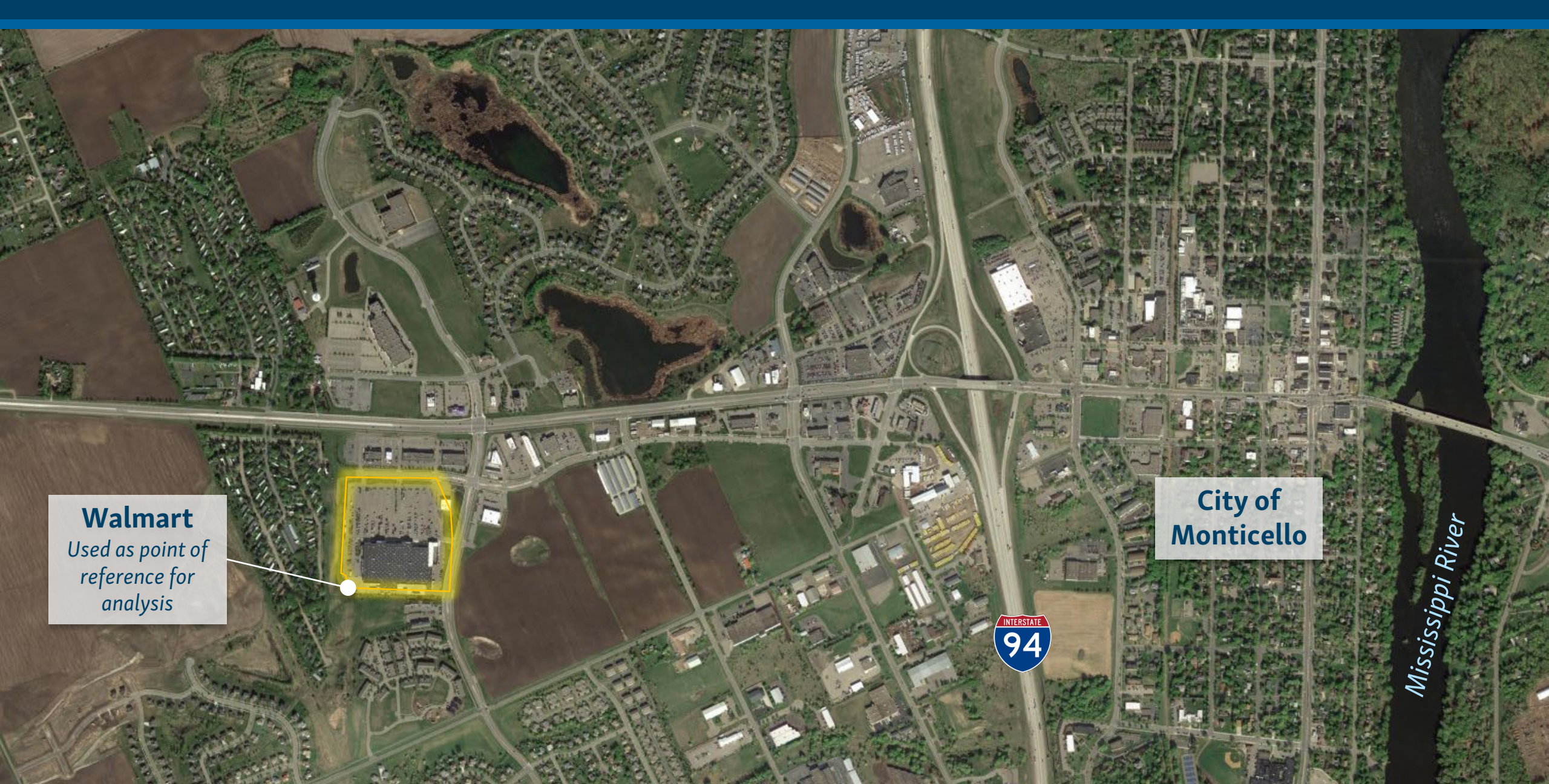




MARKET AREA | Distance vs. Drive-time

- **Distance**: Measured as the radius from a point
- **Drive-time**: Based on a algorithm embedded in mapping software from the point
- **No rules of thumb exist on right measures or scales**
 - *Both approaches have tradeoffs*
 - *Analysis depends on what you want to know and why*
- **This analysis uses the Walmart address in Monticello because of the typical geographic reach of those stores**



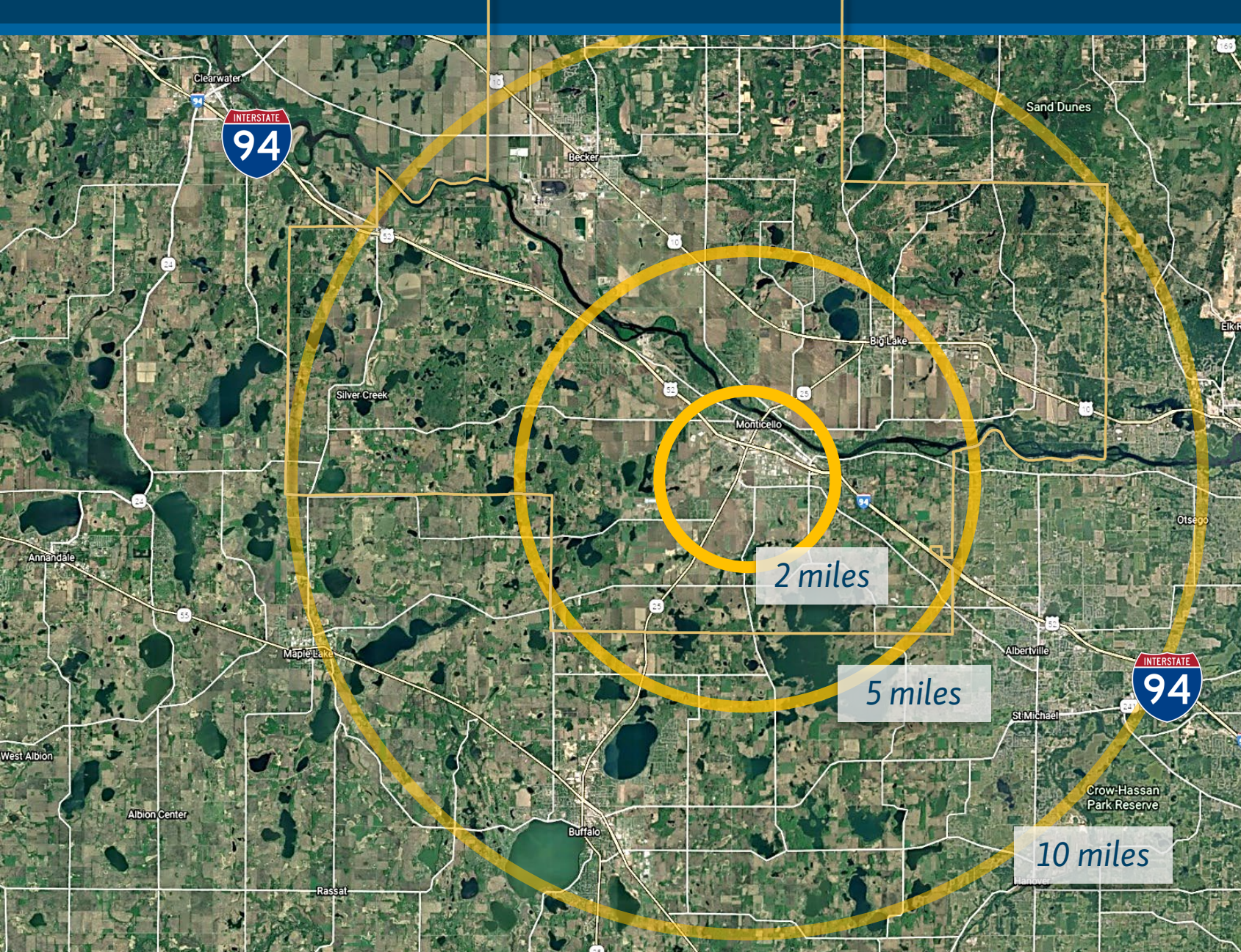


Walmart
Used as point of
reference for
analysis

**City of
Monticello**



Mississippi River



MARKET AREA Distance

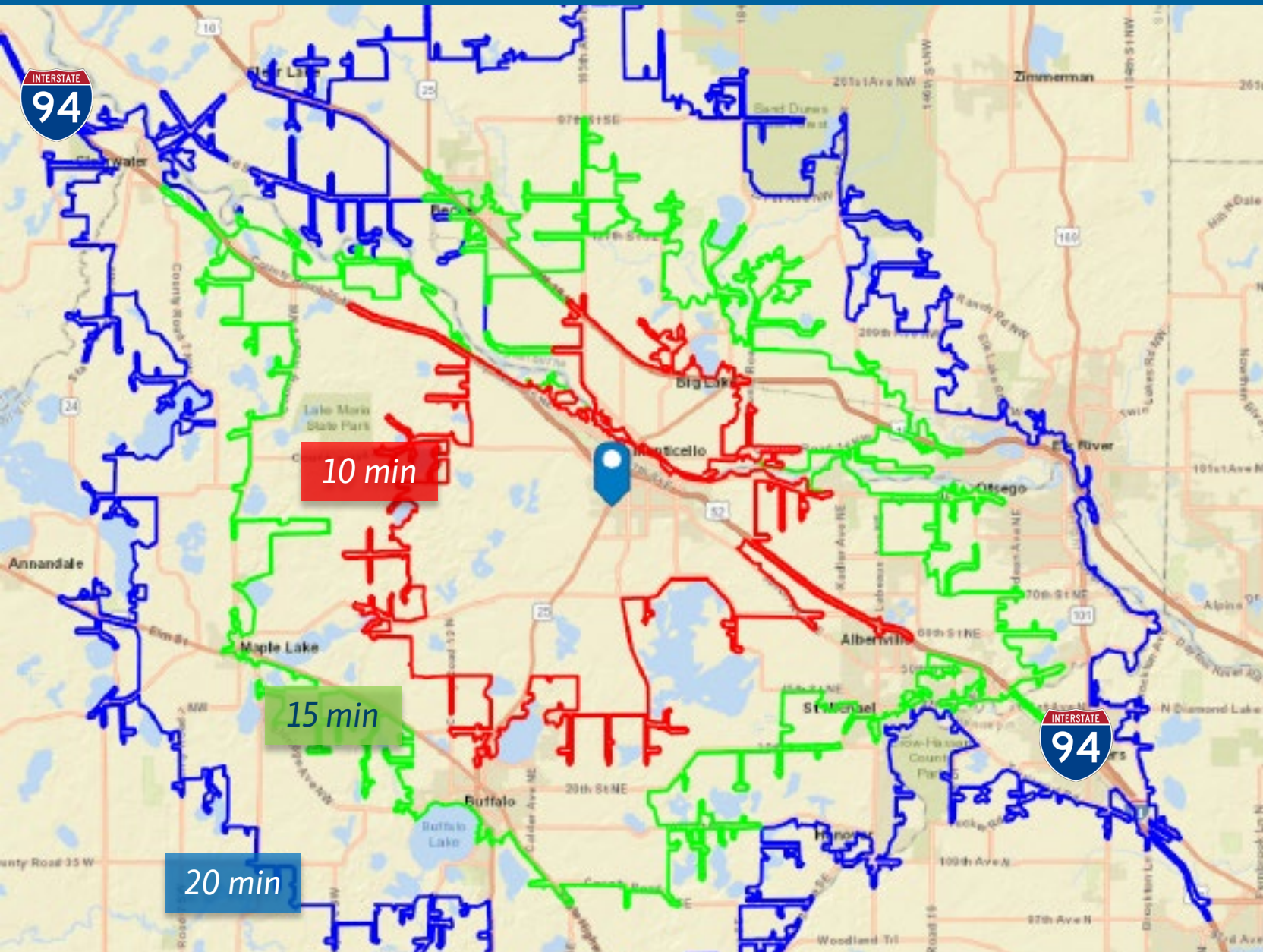
**2-mile Sales Capacity
+\$124M**

Surplus in retail & restaurant sales beyond what the population two miles away can support based on its income capacity

**5-mile Sales Capacity
+\$38M**

Surplus in retail & restaurant sales than the population five miles away

Source: NP calculations based on ESRI datasets



MARKET AREA Drive Time

**10-minute Sales
Capacity**

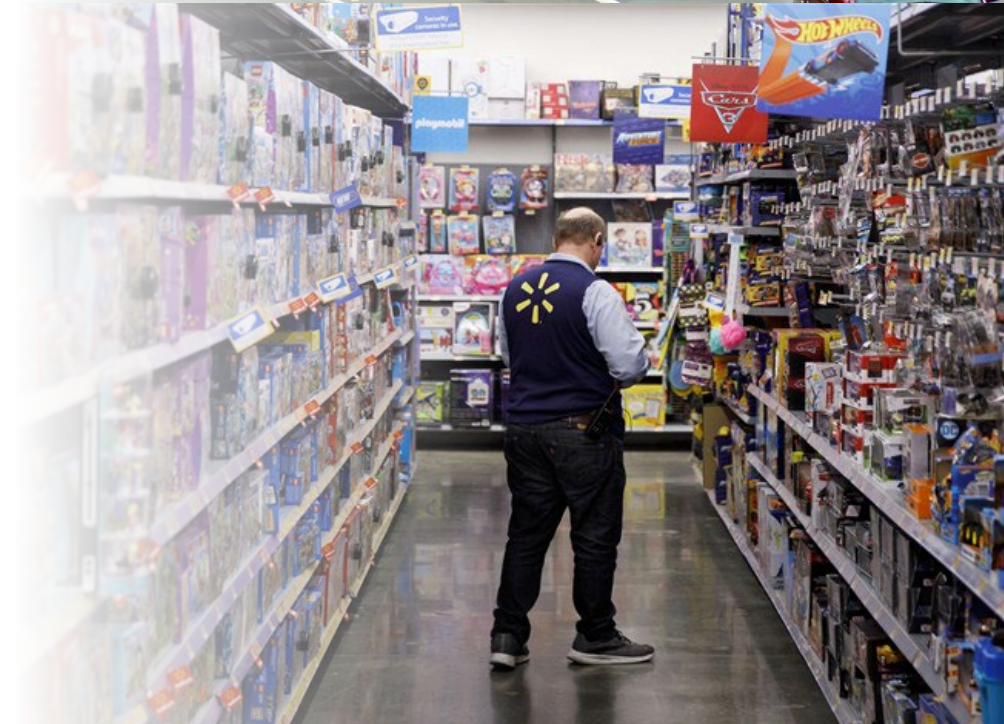
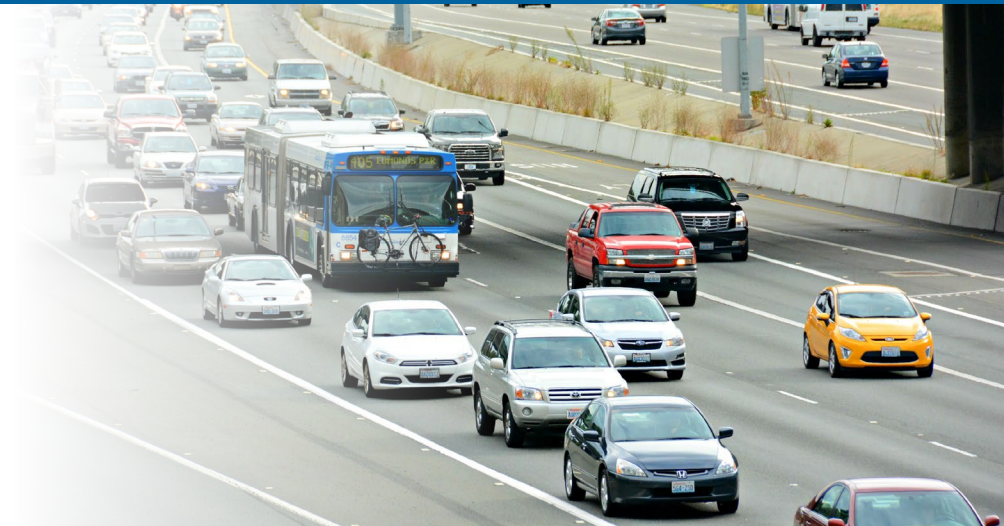
+\$56M

*Surplus of retail & restaurant sales
beyond what the 10-minute drive
time population can support*

Source: NP calculations based on ESRI datasets

So What?

- **No individual community within the planning area has enough population or income to sustain the present level of economic activity on its own**
- **The restaurant and retail base depends on the economic health and viability the broader region**



MARKET AREA | Cell Phone Location Data

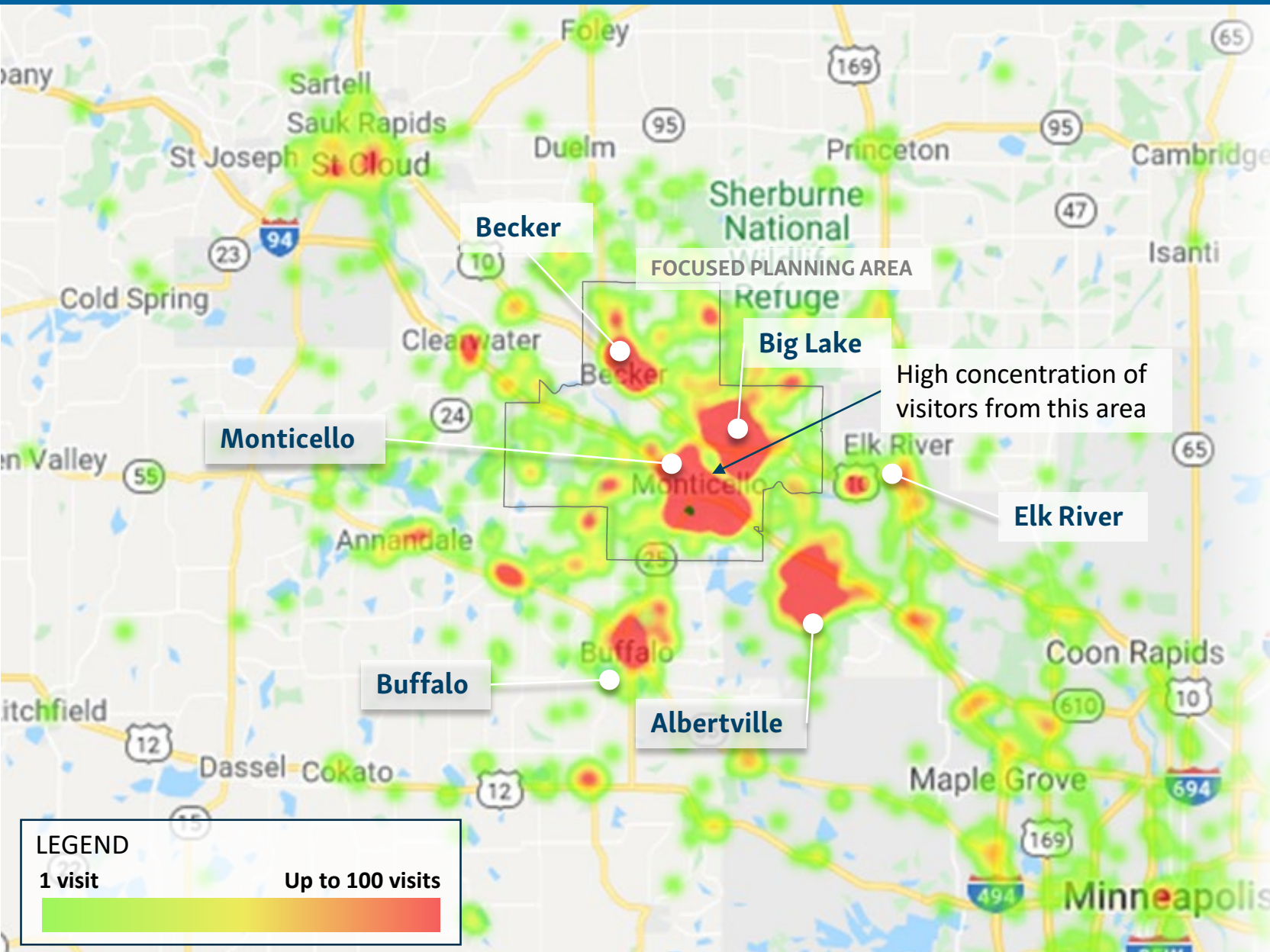
- **Geolocation data gathering process**
 - *Based on pings to cell towers*
 - *Data is anonymous and not downloadable*
 - *Source used (UberMedia) allows for tracking across days, time of day, number of visits, location two hours before arriving*
 - *Planning team simplified the requests for this exercise, explained for each exhibit*
- **This analysis uses the Walmart address in Monticello because of the typical geographic reach of those stores**



MARKET AREA Geolocation

Map shows any visitor at least once over the course of one year to the designated location (Monticello Walmart)

The red spots show the starting locations for visitors



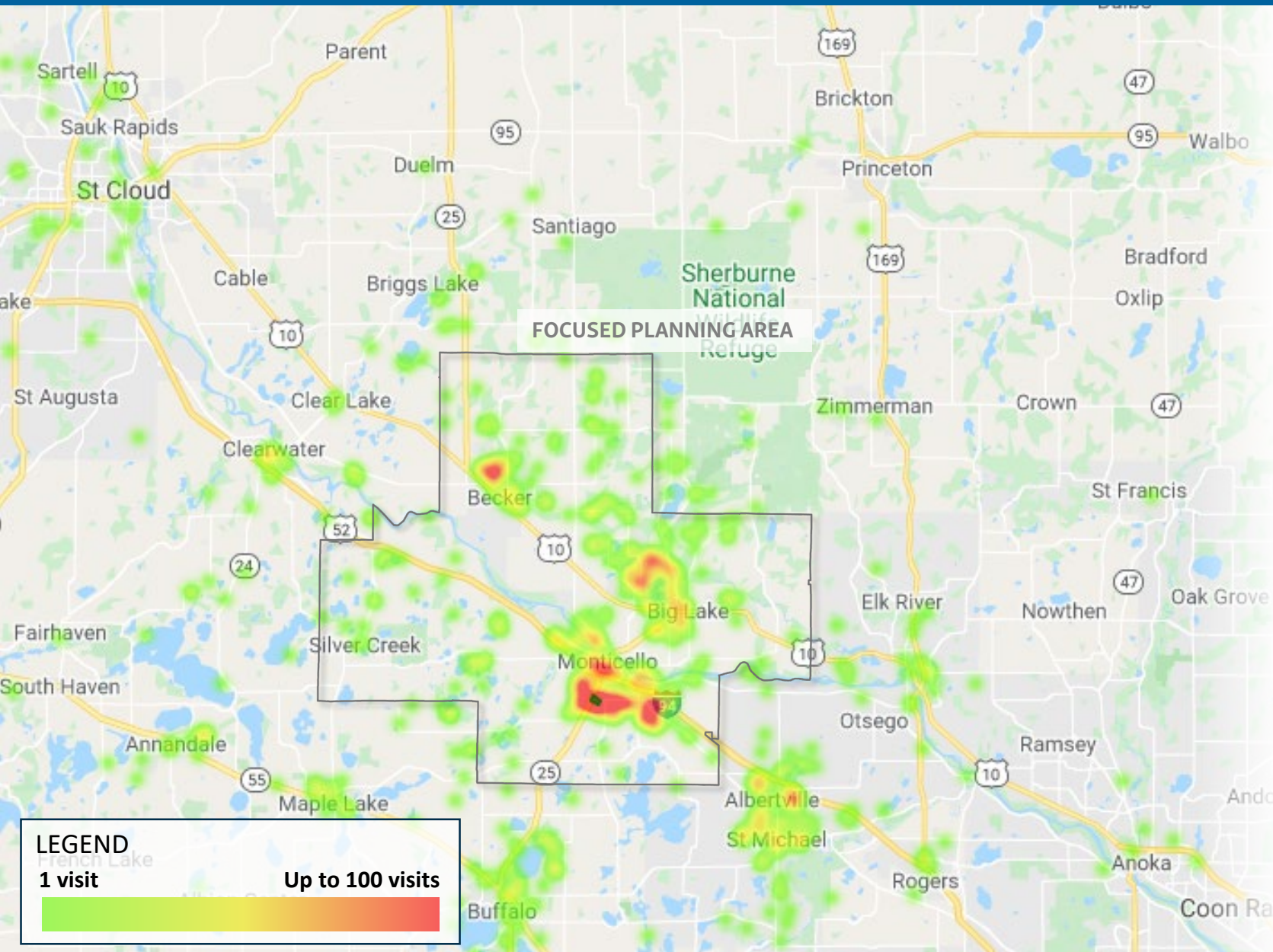
Source: NP calculations based on ESRI datasets

MARKET AREA Geolocation

This map shows any visitor at least once over the course of one month (randomly selected June 1 to July 1 2019) to the designated location (Walmart)

Residents and workers in Partnership communities are important sources of trip generation

Source: NP calculations based on ESRI datasets



MARKET AREA | Optimal Market Geospace

- **This map shows the “optimal geospace” – or the regional market area – based on a proprietary algorithm that looks at distribution and location generation of most visitors**
- **It clearly indicates that the Partnership communities are critical sources of trip generation (and potential customers) to designated location**

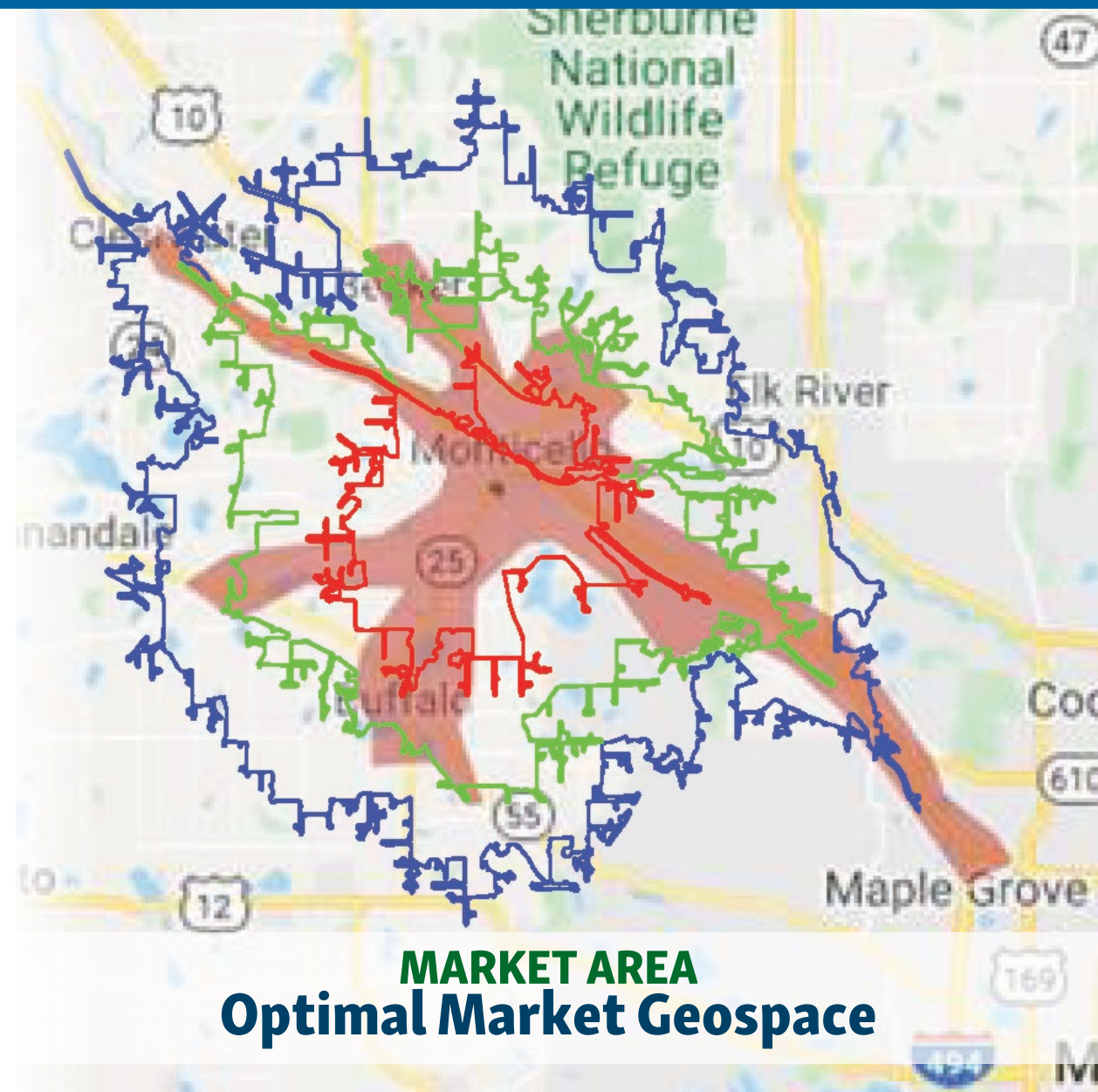


Source: NP data request Vista by UberMedia

Conclusions

While a substantial number of the region's residents work in neighboring counties, and a substantial number of local workers come into the region from outside of it, the retail and restaurant sectors depend on the region's residents for their viability.

If growing the amenity base (and tax base) is desired, it will require thinking about the size of the geographic market, connectivity across the market, and the economic wellbeing of the resident population.



Additional Information

FRAMEWORK ²⁰³⁰
partnering for the future

A little more about FRAMEWORK 2030

- **Our communities anticipate significant growth over the coming decades**
- **There are many dynamic forces (internal and external) that may impact our quality of life, place, and opportunity**
- **We have an opportunity to act and take advantage of this time and energy**



Who's involved?

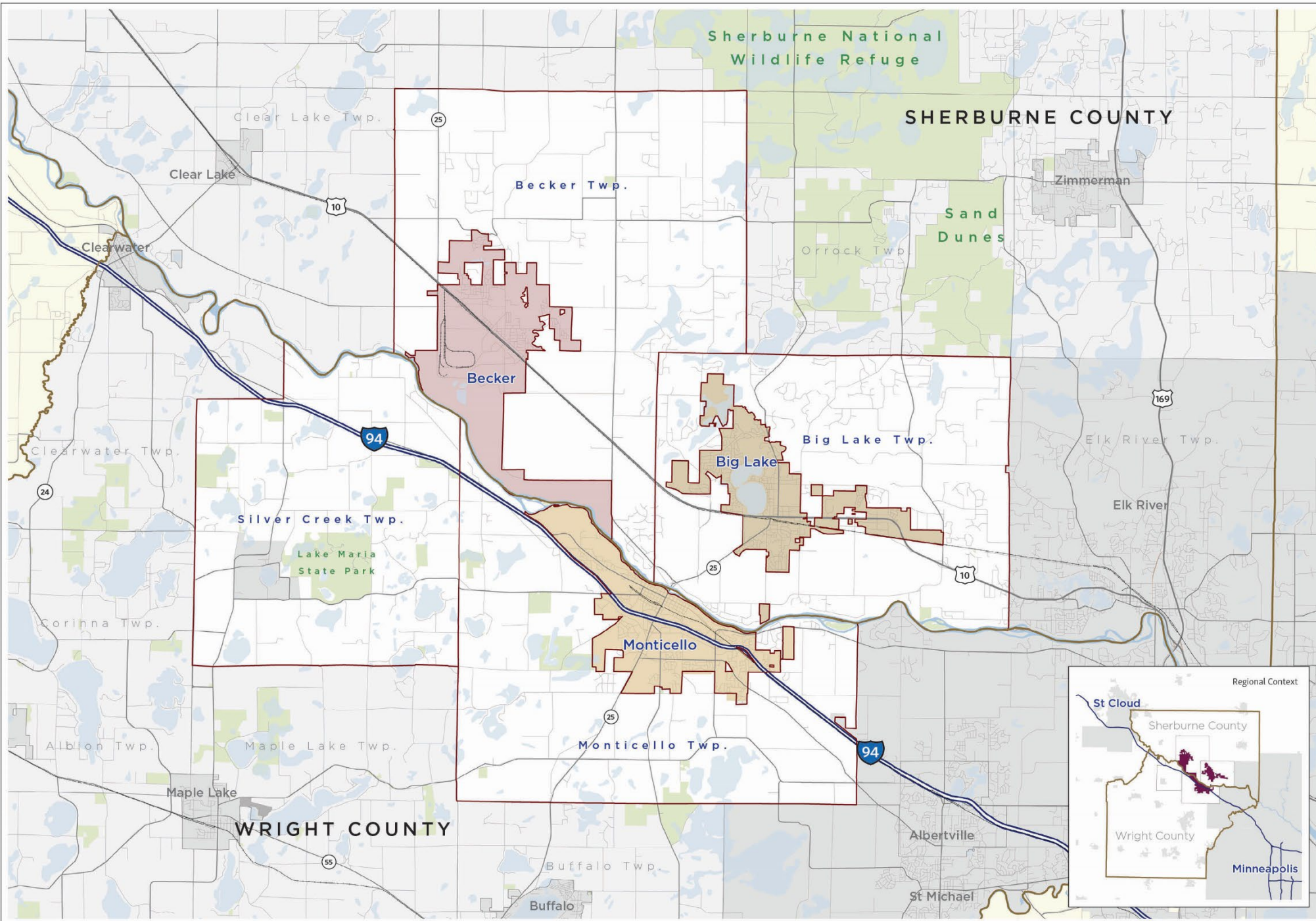
Led by the Central Mississippi River Regional Planning Partnership

- *Cities of Becker, Big Lake, and Monticello; Becker, Silver Creek, Monticello, and Big Lake townships; and Sherburne and Wright counties*
- *Coalition formed in 2016 focused on transportation issues*
- *Partnership's evolving focus on regional challenges and opportunities*



The Planning Area

-  Interstate
-  US Highway
-  State Highway
-  Participating Townships
-  Surrounding Counties
-  Other Cities
-  City of Becker
-  City of Monticello
-  City of Big Lake
-  Park Land
-  Mississippi River
-  Open Water



The Project

- **Four components to the work plan**
 1. *Preparation*
 2. *Engagement*
 3. *Analysis*
 4. *Framework Development*
- **Integrate the intuition of the public and stakeholders with strong technical analysis**

What are the goals for the project?

Through the planning project, the Partnership will work to:

- Reach consensus on major opportunities and choices that benefit the region, and successfully collaborate to maximize benefit and minimize risk;
- Position Partners to be leaders and shape their own futures individually and collectively, and;
- Support connectivity within the region, and between the region and beyond.

PREPARATION

ENGAGEMENT

PLANNING

**COMPONENT 1
Preparation**

Kick-off the project

Develop a strategy for promoting the plan and motivating participation

Create a plan for community engagement

**COMPONENT 3
Technical Analysis**

Research key challenges and opportunities facing the region

**COMPONENT 2
Community Engagement**

Think big about the future of the region and its communities

**COMPONENT 4
Plan Development**

Finalize the Framework action plan

**BIG PICTURE
SPRING 2020**

Get the conversation started and think about our goals for the future

**TESTING THE
DIRECTION
SUMMER 2020**

Affirm our goals and build actions for reaching our goals

**OPEN HOUSE
WINTER 2020**

Identify priorities and implementation strategies



How can you get involved?

- **Access the project website**
www.RegionalPlanningPartnership.org/projects/Framework2030
- **On the website you can ...**
 - *Find out more about the project;*
 - *Share your ideas through a community survey, and;*
 - *Contact the planning team with any questions or ideas.*



FRAMEWORK 2030
partnering for the future

To find out more, please visit:

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