

APPENDIX C. Summary of Current ETOD Policy - Data Analysis

Prepared by City staff and Work Group members on November 5, 2019

Background and Definition of Terms:

This analysis applies only to the geographic areas that became eligible for developer benefits as defined by the 2013 City of Chicago TOD ordinance: it compares the areas that had at least one TOD project between 01/01/2016 and 02/06/2019 and the areas that did not. The 17 CTA stations outside the City of Chicago boundary were excluded from the analysis.

Definitions are as follows:

- **TOD Project:** the 150 projects that were approved by the City of Chicago Plan Commission, City of Chicago Committee or Zoning Board of Appeals between 01/01/2016 and 02/06/2019 to utilize the TOD Zoning Code benefits, pursuant to the City's 2013 TOD Ordinance.
- **Areas near CTA rail stations with TOD activity:** A ½ mile radius around CTA rail stations where there was at least one TOD project approved between 01/01/2016 and 02/06/2019.
- **Areas near CTA rail stations without TOD activity:** A ½ mile radius around CTA rail stations where there were no TOD projects approved between 01/01/2016 and 02/06/2019.
- **Areas near Metra rail stations with TOD activity:** A ½ mile radius around Metra rail stations where was at least one TOD project approved between 01/01/2016 and 02/06/2019.
- **Areas near Metra rail stations without TOD activity:** A ½ mile radius around Metra rail stations where there were no TOD projects approved between 01/01/2016 and 02/06/2019.

Shifts by Race and Demographics

Shifts by Race¹:

- At the City level overall, there has been an increase in the White and Latino populations and a decrease in the Black population.²
- Specific to areas that became eligible for TOD developer benefits, overall, white residents have been moving into areas near CTA rail stations with TOD activity, Black residents have been moving out, and Hispanic/Latinx³ residents have seen increases in some areas and decreases in other areas.
- From 2012 to 2017, the Black population decreased in almost all areas where TOD activity occurred near a CTA rail station and increased in areas near CTA rail stations that were eligible for TOD benefits but did not see TOD activity. Over the same time period, the white population increased in almost all areas near CTA rail stations with TOD activity and decreased in areas near CTA rail stations without TOD activity. The exception to this trend is in areas near Orange Line rail stations without TOD activity, which lost black population and gained white population.
- For Metra rail stations, the Black population grew the most in station areas without TOD activity on the Northwest and Southwest sides, while the White population grew the most in station areas with TOD activity on the North and Near West sides.

¹ U.S. Census Bureau 2008-2012 and 2013-2017 American Community Survey

² <https://www.npr.org/local/309/2019/06/12/731822220/chicago-neighborhoods-continue-to-shift-in-size-and-race>

³ Hispanic/Latinx of any race.

- There has been a loss of Hispanic/Latinx population in areas near the CTA Red/Brown Line stations and a gain in areas near some CTA Blue Line stations and Green & Orange Line stations. There is no strong split between areas near CTA rail stations with TOD activity and those without TOD activity.
- Likewise, for Metra rail stations and the Hispanic/Latinx population, there has been a gain in areas near stations on the Northwest/West/Southwest sides and loss in areas near stations on the North/South/Southeast sides. There is no strong split between areas near Metra rail stations with TOD activity and those without TOD activity.

Demographics:

- Areas near CTA and Metra rail stations that are eligible for TOD benefits but have not seen TOD project activity have 40% more minority residents, 23% more low-income residents and 16% more residents with a high school education or less than areas with TOD project activity.⁴

Transportation

Public Transportation:

- Households in areas near CTA and Metra rail stations with TOD project activity have access to more transit routes overall as well as more high-frequency transit routes (defined as buses, trains, or other forms of transit that have an average headway of 15 minutes or less in a 24-hour period) than households in areas without TOD project activity.⁵
- 90% of the CTA rail stations that had an increase in ridership from 2012 to 2018 were in areas with TOD activity.⁶
- As of 2016, in most areas near CTA rail stations with TOD activity and particularly on the North Side, a higher percentage of individuals commute by train and a lower percentage by car than in areas near CTA rail stations without TOD activity; on average, 36.7% commute by car and 25.4% commute by train in areas near CTA rail stations with TOD activity vs. 53.7% commute by car and 10.6% commute by train in areas near CTA stations without TOD activity. In many areas near CTA rail stations without TOD activity, more individuals commute by bus than in those areas with TOD activity (20.4% vs. 12.5%, respectively).⁷

Car Usage:

- A higher percentage of households in areas near CTA and Metra rail stations with TOD activity (23% and 25%, respectively) does not own a car than in areas near CTA and Metra rail stations without TOD activity (18% and 13%, respectively).

Bike Accessibility⁸:

- Based on a spatial analysis of bike lanes and how they intercept with transit stations, areas near CTA rail stations with TOD activity have the most miles of bike lanes compared to areas near CTA rail stations without TOD activity and areas near Metra rail stations with and without TOD activity; however, areas near Metra rail stations with TOD activity have the highest bike lane

⁴ U.S. Census Bureau, 2016 American Community Survey 5-year estimates & CNT's AllTransit™

⁵ CNT's AllTransit™

⁶ CTA

⁷ U.S. Census Bureau 2006-2010 and 2012-2016 American Community Survey

⁸ Chicago Department of Transportation

length per worker, and all areas are similar in length per worker (1.1-1.9 feet of bike length per worker).

- Areas near CTA and Metra rail stations with TOD activity have more bike lanes than areas without TOD activity.

Employment

Transit Access

- Households in areas with TOD project activity have, on average transit access to 1.73 times more jobs than households in areas without TOD project activity (as defined by jobs within 30 minutes on transit).⁹

Jobs

- TOD projects have created 75,533 new jobs.¹⁰
- In a comparison of two communities with high TOD activity (West Loop and Logan Square) and two with little to no TOD activity (Rogers Park and Bronzeville/Oakland/North Kenwood), there was larger growth in construction, retail and accommodations and food services jobs in the high TOD activity areas.¹¹

Housing

Rent:

- From 2012 to 2017, there was a higher percentage increase in rent prices in areas near CTA and Metra rail stations with TOD activity (18% for both) than areas near CTA and Metra rail stations without TOD activity (5% and 6%, respectively) and the city overall (11%).¹²

Evictions:

- From 2012 to 2016, the percentage decrease in the number of completed evictions was larger in areas near CTA and Metra rail stations with TOD activity (-45% and -37%, respectively) than areas near CTA and Metra rail stations without TOD activity (-34% for both) and the city overall (-34%).¹³

Crime

- 91% of TOD developments are in communities where perception of safety is higher than the city average.¹⁴
- From 2012 to 2018, there was not a consistent pattern in changes in crime between areas near CTA and Metra rail stations with TOD activity and areas without TOD activity.¹⁵

⁹ U.S. Census Bureau, 2015 Longitudinal Employer Households Dynamics and CNT's AllTransitTM

¹⁰ Based on 150 approved projects seeking TOD Zoning Code benefits (2016-2018)

¹¹ Illinois Department of Employment Service 2012 and 2018

¹² U.S. Census Bureau 2012 and 2017 American Community Survey

¹³ Eviction Lab, 2012 and 2016

¹⁴ CDPH, Healthy Chicago Survey 2015-2017

¹⁵ Chicago Police Department CLEAR system, 2012 and 2018

Business Activity

- The rate of new businesses opening decreased by 6.5% in areas near CTA and Metra rail stations without TOD activity and increased by 6% in areas with TOD activity from 2011 to 2018.¹⁶
- Areas near CTA and Metra rail stations with TOD activity in the Loop, Near North Side, Near West Side, and Near South Side had the highest number of renovation/addition and new construction permits issued between 2016 and 2018.¹⁷

Parking

- From 2016 to 2018, the number of off-street parking spaces that would have been required to be built under the City's zoning code decreased by 74% in areas near CTA and Metra rail stations with TOD activity, due to developers taking advantage of the parking reduction benefit under the TOD Ordinance.¹⁸

¹⁶ Chicago Department of Business Affairs and Consumer Protection, 2011-2018

¹⁷ Chicago Department of Buildings, 2016-2018

¹⁸ Based on 150 approved projects seeking TOD Zoning Code benefits (2016-2018)