Appendix G.1
Technical Memorandum Community Assessment Baseline

TECHNICAL MEMORANDUM
COMMUNITY ASSESSMENT BASELINE

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Project: Future64: Communities » Transportation » Together
Kingshighway to Jefferson

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INTRODUCTION

This Future64 Community Assessment Technical Memorandum provides a thorough understanding of the place and the people living in and around the I-64 corridor study area. It will inform the development of the Future64 project Purpose and Need and development and evaluation of alternatives for the Future64 Planning and Environmental Linkages (PEL) study process.

BACKGROUND

Investment in improvements along I-64 has the potential to create positive social impact beyond the economic impact of construction spending and opportunities for real estate development. Such community benefits include improved access to jobs; improved neighborhood connectivity and improvements in the public realm that can enhance the marketability of redevelopment sites within the Future64 corridor; and improved access to regional multimodal transportation networks, including transit, greenways, and bicycle and pedestrian infrastructure. It is important to understand these social and market benefits in combination with the broader economic impacts that support community goals toward equity, environmental sustainability, and quality of place and life. Addressing these benefits is also a crucial component—a priority—for U.S. Department of Transportation (USDOT) discretionary grant funding programs like Rebuilding American Infrastructure with Sustainability and Equity (RAISE).

COMMUNITY ASSESSMENT FRAMEWORK

The Community Assessment Baseline is intended to provide a thorough understanding of the place and the people living in and around the I-64 corridor study area. In this memo, place is both the neighborhoods where people live, and the commercial districts and corridors where people work, shop, and recreate. Place is defined by the neighborhood boundaries; commercial and office clusters; and institutional, employment, and entertainment anchors. These distinct

places are populated by the people who live and work in the area and visit every day—people with unique characteristics, needs, and desires for the future of I-64.

The "place" for the Future64 PEL study is St. Louis' Midtown, one of the most rapidly changing areas in St. Louis (the City), and the surrounding neighborhoods. The economy and market conditions, as well as land use and development characteristics, provide context for the physical form, connectivity, public realm, and redevelopment potential within a defined area. Looking at demographic variables, including age, income, educational attainment, and physical ability, provides a lens to explore equity in mobility and access to opportunity.

The Community Assessment Baseline is a unique element of the Future64 PEL study. It goes beyond a traditional transportation study to include analysis of characteristics such as industry clusters, jobs and wages, and affordable housing to more fully understand the people and households who currently work and live within and around the study area, and might reasonably be expected to in the near future. This more diverse, deeper understanding of the economy, market, people, and neighborhood context provides in-depth insight into why people travel to, from and through the study area. Combined with community input and the study's technical traffic and transportation data, this community assessment baseline will help inform the Future 64 project Purpose and Need and the development of transportation alternatives to meet other study goals. It will also inform high-level screening criteria related to the economic, social and equity, and connectivity impacts and benefits of the transportation improvements under consideration.

MEMO ORGANIZATION

This Community Assessment Baseline consists of the technical memo and a comprehensive set of supplemental maps, data, and graphics. The technical memo highlights the key findings of the economic, real estate, people, and neighborhood analyses. The supplemental material is a comprehensive set of data that can provide additional insights. To assist the reader in the review of the supplemental material, page numbers in the supplemental material are provided in the technical memo as cross references—for example: (*page x*).

Following the Introduction to the Study Area *(pages 5-8)*, the rest of the Community Assessment Baseline is organized into two main sections—Economy and Market *(pages 9-36)*, and People and Neighborhoods *(pages 37-69)*. Each section details the key data points and characteristics around each of the topics.

MARKET AND ECONOMY

PEOPLE AND NEIGHBORHOODS

COMMUNITY ASSESSMENT BASELINE STUDY AREA

The limits for the Community Assessment Baseline are different than those of the Future64 PEL study. The I-64 study area is banded by Kingshighway Blvd to the west and Jefferson Ave to the east, and Forest Park Ave to the north and Route 100 (Chouteau Ave/Manchester Ave) to the south. The study area is broken into two tiers. The Tier 1 limits are defined as the area between Kingshighway Blvd and Jefferson Ave specific to the interstate system and contained within MoDOT right-of-way. The Tier 2 limits encompass a broader area where transportation improvements would be considered, as they provide greater connectivity and permeability with the I-64 corridor. The Tier 2 limits are Market Street and Forest Park Avenue to the north, and Chouteau Avenue and Manchester Avenue to the south.

For the Community Assessment (CA), a broader study area (not inclusive of the Tier 2 study area) was established that incorporates several of the neighborhoods north and south of the I-64 study area. The neighborhoods below represent the areas where people live and work immediately surrounding I-64. *(page 6)*

- Jeff Vander Lou
- Covenant Blu-Grand Center
- Central West End
- Midtown
- Forest Park Southeast
- Botanical Heights

STUDY AREA BOUNDARIES
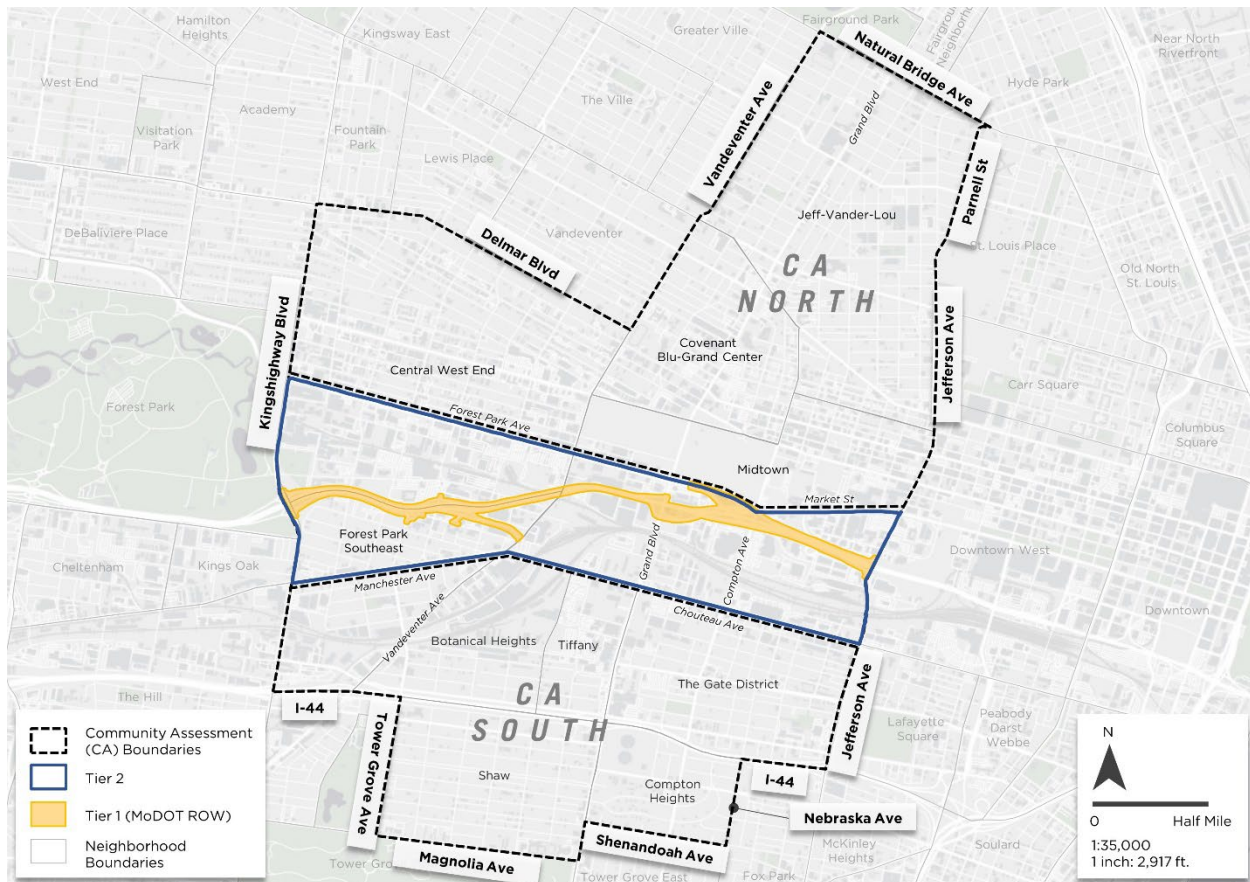
- Tiffany
- The Gate District
- Shaw
- Compton Heights

RATIONALE FOR COMMUNITY ASSESSMENT AREA

The CA area is the primary analysis area for the CA, with most data and analysis being conducted here, or at boundaries dictated by available data geographies. This boundary was defined with the intention to ensure equitable transportation options in the future, to both residents and commuters travelling to and through the Tier 2 limits and neighborhoods. The CA area was established considering local commuting patterns, adjacent neighborhoods as defined by the City of St. Louis, and how residents of these neighborhoods access the I-64 corridor, or traverse north-south across the corridor, especially along Grand Blvd – one of St. Louis' busiest north-south thoroughfares.

KEY METRICS

In a region of 2.8 million people, the City of St. Louis has roughly 11 percent of the region's population, with 309,000 people. While the region has experienced 2 percent growth since 2010, the City has lost just over 3 percent of its population. (*page 7*)

The Future64 CA area has 42,100 people, or nearly 14 percent of the City's population. And while the City has lost population in the last decade, the CA area has grown by just over 3 percent. With 57,600 jobs, the CA area has 23 percent of all jobs within the City. At $49,300, the median household income for the CA area is also slightly higher than the City average of $48,000. (*page 8*)

MARKET AND ECONOMY

REGIONAL ECONOMIC OVERVIEW

The St. Louis regional economy is well-diversified and has experienced modest growth in the last 10 years. While total employment in the City of St. Louis is lower than in 2000, growth in Educational Services; Health Care and Social Assistance; and Professional, Scientific and Technical Services has helped diversify the local economy as it shifts away from a manufacturing employment base to more talent-driven knowledge-based sectors.

Key Industry Sectors

Based on location quotient, which is the distribution of regional employment by sector compared to the national distribution of employment by sector (a location quotient above 1.0 indicates a higher-than-average regional concentration of employment), the St. Louis regional economy is well-diversified with no significant concentrations (or deficiencies) in employment by sector. The sectors with the highest relative concentrations of employment include Transportation and Warehousing (1.20), Manufacturing (1.18), and Arts, Entertainment and Recreation (1.13). The region also has average concentrations of employment in Finance and Insurance (1.10), Management of Companies (1.10), and Healthcare (1.05). (*page 11*)

Employment Trends

Prior to the COVID-19 pandemic, economic growth in the St. Louis Metropolitan Statistical Area (MSA) had been relatively slow from 2010 to 2019 with total employment growth of 8.9 percent. This is considerably slower than the national growth rate of 16.9 percent, but generally consistent with statewide economic growth. Total employment growth in the City of St. Louis also followed regional trends during this 10-year time period. The City was more adversely impacted by the economic shutdowns from the pandemic with total employment losses of 6.1 percent from 2019 to 2020, compared to losses of 4.8 percent in the region and 5.4 percent nationally. The City of St. Louis has had stagnant economic growth dating back to 2001—total employment of just under 274,000 jobs in 2020 is lower than total employment of just under 290,000 jobs in 2001. (*page 12*)

Sector Analysis

From 2010 to 2019, despite losses of Government, Manufacturing, and Information jobs, the City of St. Louis added just over 24,000 net new jobs. Job growth in the City was in three of the

top "core" knowledge-based sectors—Educational Services (+10,300 jobs); Health Care and Social Assistance (+9,300 jobs); and Professional, Scientific and Technical Services (+4,600 jobs), which is consistent with national trends. The growth in Educational Services jobs can be attributed to employment growth at local institutions of higher learning, including St. Louis University, but also from a reclassification of jobs at Washington University's medical campus located in the City. Creating opportunities to accommodate knowledge-based sector job growth will be critical to the City and regional economy. *(pages 13, 14)*

Regional Growth Clusters

Greater St. Louis Inc.'s *STL 2030 Jobs Plan* identified five target clusters with the highest potential to drive the regional economy. Given the presence of CORTEX and BJC-Washington University Medical Campus, the Tier 2 Study Area is positioned to facilitate growth in two of these clusters—Advanced Business Services and Biomedical and Health Services. *(page 15)*

ECONOMIC TRENDS

Anchored by CORTEX, BJC-Washington University Medical Campus, and St. Louis University, the CA area continues to drive regional growth in innovation and entrepreneurship, technology, educational services, and healthcare jobs.

Employment Trends

Despite some of the economic challenges of the City, employment growth in the Tier 2 Study Area has exceeded City and regional employment growth. In fact, employment growth has declined in the City outside of the Tier 2 Study Area boundaries. According to OnTheMap, from 2010 to 2019, Tier 2 Study Area added just under 4,300 jobs for an increase of around 14 percent, while the MSA experienced employment growth of 9 percent and the reaming areas of the City outside of the Tier 2 Study Area had a decrease of 4 percent. *(page 17)*

Sector Trends

According to ESRI, the Tier 2 Study Area has nearly 27,000 employees representing nearly 11 percent of City employment. Most of these jobs (52 percent) are in Health Care and Social Assistance given the presence of the BJC-Washington University Medical Campus. There is also a concentration of Educational Services jobs (3,021); Administrative Support jobs (1,952); and Professional, Scientific, and Technical Services jobs (1,310) that could be attributed to the medical infrastructure, as well as CORTEX. *(page 18)*

Knowledge-Based Sectors

More than 70 percent of the jobs in the Tier 2 Study Area are in the knowledge-based sectors of Healthcare and Educational Services jobs as well as Professional sectors (Finance and Insurance; Management of Companies; Information; and Professional, Scientific and Technical Services), compared to a regional share of just under 39 percent. This demonstrates the competitive positioning of the study area as a regional hub of "new economy" jobs that are growing nationally and are drivers for regional talent attraction. *(page 19)*

Employment by Income

Based on distribution of employment by sector and average wages by sector, the average wage for workers in Tier 2 is just over $60,500, which is slightly below the City average, but higher than the regional average. More importantly, there is a much higher proportion of jobs that pay more than $50,000 annually in Tier 2 (84 percent) compared to 79 percent in the City and only 68 percent in the region. Only 7 percent of the jobs in Tier 2 pay less than $35,000, which can be attributed to the relatively low share of food service and retail jobs compared to the regional average. By comparison, 13 percent of the jobs in the City and 21 percent of the jobs in the region pay less than $35,000. *(page 20)*

Employment Distribution

The highest concentrations of employment are in and around the BJC-Washington University Medical Campus on the west side of the CA area. The center portion of the study area includes CORTEX, which has an estimated 6,000 workers with plans for expansion. East of Cortex is Ikea with 400 workers and the St. Louis University campus with university staff and its adjacent retail uses. There are concentrations of retail jobs along the Manchester Avenue ("The Grove") and Forest Park Avenue corridors, as well as Grand Center to the north. On the far eastern end of the study area is the Wells Fargo campus. *(pages 21, 22)*

Commuting Patterns

Ninety-nine percent of the workers in the Tier 2 Study Area and ninety-five percent of the workers in the CA area commute into these study areas, which can be attributed to the lack of local housing for the workforce. When considering the residents living within the CA area who work, 11 percent of them live and work in the CA area; emphasizing the importance of transit, and local pedestrian and bicycle connectivity. *(page 23)*

MARKET OVERVIEW

Regional Real Estate Trends

Despite the City losing population since 2010, 5,500 multifamily housing units have been constructed in the City contributing to 30 percent of the new regional supply and outpacing development in St. Louis County. Retail was strong in the City, adding 1.1 million square feet for an increase of 5 percent, outpacing growth in the region. The City lost a large share of its industrial building stock (6.6 million square feet) due to redevelopment activity. Office development continues to be stronger in suburban areas of St. Louis and St. Charles Counties, while the City's supply increased by only 0.3 percent (850,000 square feet constructed). *(page 25)*

Study Area Real Estate Trends

The Central Corridor that stretches roughly from downtown St. Louis to Forest Park along I-64 has seen tremendous growth and development over the past 20 years. With the support of Washington University, BJC Healthcare, St. Louis University, the City of St. Louis, and private developers, there has been substantial investment in the area. New businesses, especially those focusing on biotechnology, have been attracted to the new office and research facilities in proximity to major research institutions. Private developers have constructed over 1,800

multifamily units and around 1,800 student housing beds within the boundaries of the CA area and Tier 2 study area since 2010, to house workers and students. Development continues to occur, ranging from investments in new hospital infrastructure to private mixed-use development. *(pages 26-32)*

Multifamily Housing

The multifamily housing market is strong in the Tier 2 Study Area with vacancy rates lower than, and effective rents higher than, the Citywide and regional averages. Vacancy in the CA area has decreased significantly in the last few years as demand has increased for centralized and higher-quality housing in areas with high walkability. Of the 5,500 multi-family units delivered in the city since 2010, 1,130 or around 20 percent of this new supply is located within the CA area. Together with Tier 2, new supply totals over 1,800 units – a third of the city's new multifamily units since 2010. Most of these new multifamily housing supply has been constructed in the western portion of the CA area in Central West End and Forest Park Southeast.

Student Housing

Given the presence of St. Louis University, student housing development has been strong in and around the Tier 2 Study Area with four new properties constructed since 2010 and one property in the pipeline. Since 2010, around 1,300 new student beds have been added in the CA area – more than two-thirds of the city's new supply.

Retail

Tier 2 Study Area has had more than 900,000 square feet of retail constructed since 2010, which can be attributed to Ikea opening in 2014 and City Foundry opening in 2021. Retail vacancy increased significantly with the recently opened City Foundry that has had slow absorption given the COVID-19 pandemic's impacts on the retail market. This development also impacted average gross rents, with the property having some of the highest rents in the region.

Office

Since 2010, almost all the City's office development activity has been in the Tier 2 Study Area with significant activity in CORTEX and the Washington University Medical Campus. This new supply has led to an increase in average vacancy, but an increase in gross rents that are significantly above the regional average.

Industrial

While the CA area contains a large supply of industrial space, there has been no industrial development activity since 2010. Generally, the newest supply in the region has occurred in lower density areas that are more supportive of businesses transportation, warehousing, and logistics needs. Additionally, given the CA area's marketability for multifamily, hospitality, office, and retail uses, this has limited the market feasibility for industrial development. Moving forward, the industrial supply will likely continue to decline for adaptive reuse redevelopment opportunities.

Hotel

There have been several new hotels with a total of 760 rooms constructed in the CA area since 2010. Occupancy rate and average daily rate trends for the entire hotel supply have been generally consistent with the Citywide average.

Stakeholder Interviews

Development Strategies held multiple interviews with a range of real estate professionals familiar with the CA area. These interviews included discussions about current and future projects within and nearby the CA study area, impressions of how infrastructure is currently functioning in the CA area and how it could be improved, and the general impression of the development process within St. Louis. These conversations, in addition to the market and economic analysis, helped support the following Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis. *(page 33)*

SWOT Analysis

Strengths	Weaknesses
• Concentration of biotechnology-focused businesses will continue to attract new talent/businesses to the project area • Proximity to major educational and research institutions will attract students/faculty to live in the area • Availability of light-rail public transportation allows workers and residents easier access to employment, entertainment, and residential amenities	• A perception by developers that the City of St. Louis' shift in strategy to focus incentives elsewhere in the city may slow new development within the project area • A negative perception of St. Louis as a place to live may dissuade individuals and families from relocating to the area
Opportunities	**Threats**
• Ample developable sites remain within—and nearby—the project area • While national developers may be wary of investing in St. Louis, there exists a local development community that has proven a commitment to investing in the City of St. Louis and rehabilitating formerly blighted and contaminated sites • Pipeline of highly educated graduates to be employed at or live near the project area	• Continued investment in new development to the west of St. Louis threatens to move the 'center' of the region out of the City, stealing new businesses and residents • Changes in working patterns—partly due to the recent pandemic—may somewhat reduce the need for dedicated office space or residential space adjacent to employment centers • Increased competition from other cities (Kansas City, Chicago, Indianapolis, Nashville and beyond) may attract new businesses that would have otherwise chosen St. Louis • Adjustments to economic incentive programs (TIF, CID, TDD, etc.) may reduce the amount of assistance available to developers, rendering future projects financially infeasible.

ECONOMIC COMPETITIVENESS

Key Success Factors

The Tier 2 Study Area is essential for supporting regional economic development efforts given its diversified employment base in growing knowledge-based sectors, multimodal accessibility, and central urban location. The role of I-64 is also critical to its success—it provides vehicular accessibility to the regional labor force. However, creating and maintaining seamless connections across I-64 that link pedestrians, cyclists, and automobiles to and from employment opportunities, housing, retail, and recreational opportunities will be necessary for the area's livability.

The competitiveness of the study area is supported by the following success factors:

- **Central location.** Tier 2 Study Area is centrally located in St. Louis' Central Corridor that stretches from downtown St. Louis west to Forest Park. This area that includes the Tier 2 Study Area contains approximately 150,000 jobs, or around 60 percent of the jobs in the City. While employment is generally decentralized in the St. Louis region with 1.4 million jobs spread over a 15-county area, the Tier 2 study area has the highest employment density in the region with around 16,000 jobs per square mile, compared to the city's 3,800 jobs per square mile.

- **Employment growth.** Within the City, from 2010 to 2019, the largest net gains in employment by sector have been Educational Services; Healthcare and Social Assistance; Professional, Scientific, and Technical Services; and Finance and Insurance. All are key knowledge-based sectors that are growing nationally. The Tier 2 Study Area has also experienced considerable growth in these sectors and is critical to continuing to position the region for future economic growth and competitiveness.

- **Regional economic development alignment.** As part of the regional economic growth strategy (*STL 2030 Jobs Plan*), two of the key growth clusters are Advanced Business Services, which includes finance, insurance, and information technology, and Biomedical and Health Services. Both of these clusters have a strong institutional presence in the Tier 2 Study Area with Washington University Medical Campus, CORTEX, and BioSTL's BioGenerator. These three institutions, in addition to Washington University and St. Louis University, are positioned to drive high-growth innovation and entrepreneurship in the region.

- **Higher wages.** Based on average wage by sector, the Tier 2 Study Area has a much higher proportion of higher wage jobs compared to the City and the regional average and provides more paths to upward mobility. These types of jobs are also very attractive to talented and mobile workers.

- **Value of Forest Park.** While just beyond the Tier 2 Study Area, Forest Park is the recreational and cultural anchor for the entire region and has considerable value to

nearby residents and employers. It plays a vital role in attracting talent to the region, as well as promotion of health and wellness.

- **Accessibility and walkability.** With 96 percent of the workforce commuting into the Tier 2 Study Area, I-64 is critical to providing vehicular access and maintaining connectivity to adjacent neighborhoods. Tier 2 Study Area is unique in that it includes residential neighborhoods, a burgeoning main street retail district with dozens of locally owned businesses along Manchester Avenue, and a dense concentration of well-paid, knowledge-based jobs. North-south bike, pedestrian, and vehicular connectivity across I-64 will be critical to the long-term viability and competitiveness of the area. Seamless connections between housing and employment opportunities will support future investment in the neighborhoods.

The Study Area is also served by three MetroLink Stations, including Central West End Station, the busiest in the network in terms of average daily ridership. The CORTEX Station, built in 2018, was designed to alleviate platform congestion at the Central West End Station and provide direct access to CORTEX. This station further enhances the market potential for new mixed-use development.

Special Taxing Jurisdictions

There are numerous individual special taxing jurisdictions within the study area, ranging from individual parcel tax abatement to multi-acre Tax Increment Financing projects. The following highlights key projects within the area. *(page 35, 36)*

Tax Increment Financing

Tax Increment Financing, or TIF, is utilized to encourage redevelopment of blighted areas by capturing a portion of the new tax revenues generated by redevelopment. These monies are used to offset development costs over the lifetime of the project. Within the Study Area there is a handful of TIF districts—shown in Table 1. For example, Cortex, one of the oldest districts, was started to redevelop a large area into a biosciences research area and mixed-use residential neighborhood. To date, multiple phases of the redevelopment have been finished, and the area boasts significant growth over the last decade. Similarly, the City Foundry, Armory District, and 374 S. Grand projects also use TIF to help offset the costs of renovating older buildings, many of which had significant environmental issues.

Table 1. TIF Districts in the CA Area

Project Name	Acres	Use	Status
Cortex	167	Office/Bio Sciences/Mixed-Use	Multiple phases open; additional phases under construction or available for development.
City Foundry	18.7	Mixed-Use Residential/Office	Phase I open; Phase II in development

The Armory District	8.9	Entertainment/Mixed-Use Residential	Under Construction
374 S. Grand	5.95	Mixed-Use Residential	Complete
Chouteau Compton Industrial Center	20.1	Industrial/Retail	Unknown

Transportation Development District

Transportation Development Districts, or TDDs, are used to fund the construction of transportation related improvements. Generally, these are funded through an additional sales tax of up to 1.0 percent, special assessment, property tax, or toll. TDDs are often overlaid with a TIF and/or CID. The TDDs in the CA area are shown in Table 2.

Table 2. TTDs in the CA Area

Project Name	Acreage	Use	Status
212 S. Grand TDD	4.51	Mixed-Use Residential	Complete
Residence Inn Downtown TDD	3.14	Hospitality	Complete

Community Improvement District

Like a TDD, Community Improvement Districts, or CIDs, generate revenues through a sales tax, special assessment, or property tax. These revenues are used to fund a wide range or improvements within the TDD borders—ranging from pedestrian plazas to special events. If an area is deemed 'blighted' per Missouri Statutes, CID may also be used to fund the cost of demolition or structure renovations. The CIDs in the CA Area are shown in Table 3.

Table 3. CIDs in the CA Area

Project Name	Acres	Use	Status
212 S. Grand CID	4.51	Mixed-Use Residential	Complete
Residence Inn Downtown CID	3.14	Hospitality	Complete
Chouteau Crossing CID	9.73	Industrial/Training	Complete

Chapter 353 Redevelopment Area

Chapter 353 of the Revised Statutes of Missouri allows for real property tax abatement within blighted areas. St. Louis University established the large Midtown 353 area to address and have

control over the long-term redevelopment of the area. While the university owns some of the property within the area, many of the privately held parcels that will be developed in the future will likely seek property tax abatement through the Midtown 353. To date, multiple projects have been completed or are ongoing within the area. The Chapter 353 Redevelopment Area in the CA Areas is shown in Table 4.

Table 4. Chapter 353 Redevelopment Areas in the CA Area

Project Name	Acres	Use	Status
Midtown 353	350	Mixed-Use	Ongoing; Substantial parcels available for redevelopment

Real Estate Implications on Commercial Corridors

The Study Area has seen tremendous growth over the past decade, and projects continue to flourish in the area, despite the recent pandemic and sharp increase in construction costs. Phase II of the City Foundry project is underway, and construction is ongoing at the Armory District project, both located near Interstate 64. The Edwin, located near the corner of Grand and Chouteau Aves, is in development, and additional mixed-use development is underway at the Steelcote lofts.

Based on conversations with local real estate professionals, substantial redevelopment is highly likely to occur on key surface street corridors within the next 10 to 20 years. Large, developable parcels are available or already under developer control along Grand, Manchester, and Vandeventer Aves.

Taken as a whole, these ongoing development projects, combined with the expected future growth in the area, will continue to evolve the Study Area from a light-industrial corridor to a dense residential neighborhood.

PEOPLE AND NEIGHBORHOODS

COMMUNITY ASSESSMENT AREA SNAPSHOT

While the CA area has 42,100 people living in it, there are only 4,300 people living within the Tier 2 study area. This is due to its primarily commercial and industrial nature, and is reflected in a relatively low population density. As one moves north and south away from the I-64 corridor, the population density increases, with relatively high population density in the Central West End, the northern portion of Forest Park Southeast, and the Shaw neighborhood.

Unemployment rates are relatively low in and around the Tier 2 study area but increase significantly as one moves north within the CA area, in and around the Jeff Vander Lou neighborhood. These unemployment rates are reflected in other socioeconomic conditions, such as educational attainment, income, and poverty rate.

The Crime Index[i] scores are relatively high in block groups throughout the CA area, especially in the neighborhoods just south of the Tier 2 study area, further north into the Covenant Blu-Grand Center and Jeff Vander Lou neighborhoods.

NEIGHBORHOOD DEMOGRAPHICS

With the influx of new development within the Tier 2 study area over the past 10 years, the population growth rate of nearly 19 percent far exceeds the regional average. The average household size is smaller than the City average, given the concentration of students, singles, couples, and households without children. *(page 41)*

Looking at a high-level neighborhood comparison, Forest Park Southeast grew in population by more than 32 percent since 2010, one of the fastest growing neighborhoods in the City. Central West End has also experienced strong growth, while Grand Center experienced a slight population decline. Outside of the growth in Forest Park Southeast, population growth south of I-64 has been slower than areas to the north. Household sizes in these southern neighborhoods are more consistent, or even slightly higher, than the City average. *(page 42, 43)*

Educational Attainment

The western portions of the study area, including the neighborhoods immediately to the north and south, have higher concentrations of highly educated individuals. The areas to the east have lower levels of educational attainment but are consistent with the regional average. The neighborhoods to the far north of the CA area have a significantly lower share of population with a bachelor's degree or higher, showing a mismatch between the population living there and the educational requirement of the jobs within the study area. *(page 44)*

Age of Residents

The CA area has a relatively large college-age population (27 percent) given the presence of St. Louis University and the proximity of Washington University and Harris-Stowe State University. From 2010 to 2021, the Tier 2 study area had a large increase in its population age 65 and older, as well as increases in younger adult households, possibly attributed to the continued reinvestment in the Forest Park Southeast and Central West End neighborhoods. *(page 45)*

Income of Residents

While the median household income for the CA area ($49,000) is slightly higher than that of the City ($48,000), there is considerable variation and disparity throughout the CA area. While areas to the south of the Tier 2 boundary and just north in the Central West End generally have incomes comparable to, or even above, the regional median of $66,000, households to the east and northeast generally have incomes below $30,000. This can be attributed to the large student population and weaker market conditions in the Jeff Vander Lou and Covenant Blu-Grand Center neighborhoods. *(page 46)*

Race and Ethnicity

Racial composition in the Tier 2 study area and the CA area is similar to the City. Within the CA area, however, the Central West End and Shaw neighborhoods have relatively large white populations, while the areas to the north in and around Grand Center and Jeff Vander Lou are predominantly Black. *(page 47)*

Household Poverty

Concentrations of poverty vary throughout the CA area, with pockets of high concentrations of poverty both north and south. Generally, poverty levels are significantly higher and concentrated in the areas to the north around Covenant Blu-Grand Center and Jeff Vander Lou neighborhoods. When looking at households that receive food stamps/SNAP (Supplemental Nutrition Assistance Program), a slightly clearer picture emerges, as this data would generally exclude lower-income college students, and therefore better isolate traditional households living below the poverty line. *(page 48)*

Population of Children and Seniors

There are more children living in the northeast and southern portions of the CA area, whereas the Central West End and Midtown have relatively few children. This is in contrast to the higher concentrations of senior adults (age 65+) living in the Central West End and portions of the Covenant Blu-Grand Center and Midtown neighborhoods. *(page 49)*

HOUSING OVERVIEW

Population Change and Housing Units

Since 2010, population increased in most of the northwest, west, and southwest portions of the CA area, while the east and southeast portions had little to no increase, due in large part to the lack of new residential development. This is in contrast to the neighborhoods to the far north that experienced relatively greater population loss.

Housing density is higher in the western portions of the Tier 2 study area and in Central West End, due to a greater concentration of multifamily residences. Likewise, the areas just to the northeast of the Tier 2 study area have a higher housing density, reflecting the presence of multifamily housing aimed at students. *(page 51)*

Housing Composition

The Tier 2 study area has just over 2,500 housing units, adding more than 500 net new units since 2010, representing nearly 30 percent of the new housing in the CA area. The Tier 2 area

has a much higher proportion of multifamily units (56 percent) compared to the City (25 percent) and region (13 percent), and a higher share of renter-occupied units (81 percent).

Median housing values in Central West End ($378,000), Shaw ($313,000) and Compton Heights ($382,000) are significantly higher than the other neighborhoods and the City median ($166,000). Development activity has been strong in Central West End and Forest Park Southeast, adding approximately 1,200 and 660 new units, respectively. There has been limited new development in the neighborhoods to the south given the lack of larger-scale, development-ready parcels. *(page 52- 54)*

Owner-Renter and Vacancy

There is a significantly high concentration of renter-occupied housing north of the Tier 2 study area. The vacancy rate varies throughout the CA area. Midtown's high vacancy rate is skewed by its primarily industrial and institutional land uses and sizable renter population (94 percent renter-occupied units). The vast majority of the housing stock here consists of two housing towers (Midtown 300 and Council Tower Senior Apartments) and student housing. The relatively high vacancy rate in Forest Park South East can be attributed to decades of disinvestment in the neighborhood, and though some reinvestment activity has taken place in recent years, including new market rate infill housing development, many structures still need substantial rehabilitation. *(page 55)*

Home Value and Rent

Median home values are significantly higher in the northwest, west, and southwest portions of the CA area. While median gross rents vary widely throughout the CA area, they are somewhat consistent with home values in Central West End and Compton Heights. *(page 56)*

Housing Affordability

A high-level housing affordability analysis was conducted for the CA area and the Tier 2 study area. Housing demand is based on what a household could afford in terms of rent or purchase price, based on household income and a maximum of 30 percent of income being spent on housing (over 30 percent is considered housing cost burdened).

The demand analysis shows considerable demand for "deeply affordable" housing—with rents below $500 per month, and requiring direct subsidy to support— as well as demand at the mid-level (rents between $1,500 to $2,000). Demand for for-sale housing is considerable across the affordability spectrum, from affordable (less than $50,000) to luxury market rate (over $500,000).

The supply analysis is based on distribution of housing by value or rent. There is significant mismatch between demand and supply for affordable rental units, with an undersupply of deeply affordable (subsidized) units, and an oversupply of more moderately affordable rental units. This data suggests that lower-income renters are likely living in the more expensive housing, and are thus cost burdened (i.e., paying more than 30 percent of their household income on housing). On the for-sale side, there is a significant undersupply of housing across the affordability spectrum. *(page 57)*

TRANSPORTATION EQUITY

Transportation Costs and Vehicle Availability

Average annual transportation cost is determined by annual consumer spending on vehicle payments, fuel, maintenance, transit costs, etc. The distribution of transportation costs is generally consistent with the distribution of median household income, for example, higher-income households spend more on transportation. Conversely, lower-income households that may rely more on transit as their primary means for transportation may have lower overall transportation costs, although this is not an indication of the share of household income spent on transportation.

Data about households with no personal vehicle indicates the concentration of a transit-dependent population. There is a larger concentration of households without a vehicle in the east and northeast portions of the CA area, given in large part to the student population and weaker socioeconomic conditions. *(page 59)*

Households with Disabled Persons

The U.S. Census considers that someone has a disability if they have any one of six disability types: difficulty with hearing, vision, cognitive, ambulatory, self-care, and independent living. Within the CA area, the distribution of households with disabled persons (at least one disability) is generally consistent with the distribution of persons aged 65 and older. *(page 60)*

Share of Minority Population

Share of minority population is considered as the share of all non-white populations. The Tier 2 study area and Central West End have relatively high percentage of white populations. There are higher concentrations of minority populations (greater than 60 percent) immediately south of the Tier 2 study area, and further north around Covenant Blu-Grand Center and Jeff Vander-Lou. *(page 60)*

Various Methodologies for Understanding Transportation Equity

Beyond some of the key data points that are often considered when looking at transportation systems through an equity lens, there are various methodologies and composite indices that strive to bring in multiple social, economic, environmental, and public health factors as they relate to transportation access, mobility, safety, and access to opportunity. These include the following:

- The **USDOT defined Disadvantaged Communities (DAC)** considers 22 key indicators that are collected at the census tract level and grouped into six categories of transportation disadvantage. *(page 61)* With the exception of Shaw, Compton Heights, and Central West End, the entire CA area consists of USDOT-designated Disadvantaged Communities.

- The **Neighborhood Assessment** *(page 63)* looks at crime, poverty, home values, and population change as a way to understand the trajectory of neighborhoods, and the need and capacity for improvement. The Neighborhood Assessment creates an index and then

categorizes areas as Opportunity, Transitional, Stable, or Growing as a way to provide a quick snapshot of areas that might benefit from transportation investments that support greater community reinvestment.

- The **Vulnerability Index** *(page 64)* is a composite indicator focused on characteristics of people and households that may make individual mobility and accessibility a particular challenge, and that should be looked at to help ensure transportation investments benefit those that need it most. The index uses factors such as minority population, households without a personal vehicle, households with at least one disabled person, households with children or seniors, and household income. The Vulnerability Index provides a snapshot of where populations might benefit from greater investments in quality, safe, multimodal infrastructure.

- The **Housing and Transportation Affordability Index**, from the Center for Neighborhood Technology, comprehensively considers the true affordability of a place. *(page 65)* The index provides an expanded view of affordability, one that combines housing and transportation costs, and sets the benchmark at no more than 45 percent of household income. Using a variety of neighborhood and household characteristics to create the index, it offers a view of housing and transportation affordability, beyond the basic housing cost burden. It is important to consider this index in the context of the community and other available indices to draw the appropriate conclusions. For example, just because areas such as Midtown, Covenant Blu-Grand Center, and Jeff Vander Lou have low Housing and Transportation Affordability Index values does not mean they do not need ongoing multimodal transportation investments. It may mean that these more affordable neighborhoods need continued investment in transit and other pedestrian improvements as a means for keeping overall costs within a more affordable range.

- WalkScore and BikeScore *(page 66)* considers a variety of factors—such as availability of bicycle and pedestrian infrastructure, connectivity of infrastructure, accessibility (points of access to the infrastructure), the number and density of community destinations available along the infrastructure, and the quality of the built environment—to establish a score for neighborhoods. While walkability and bikeability vary across the CA area, several proposed projects will improve these active transportation scores in coming years.

TRAVEL PATTERNS

Travel patterns were analyzed using REPLICA data, which allows for analysis of mobility using cell phone data. Analysis was focused on understanding the trips that start and end in the neighborhoods north and south of the Future64 corridor, in order to assess connectivity and the need for permeability within the study area. While private auto trips, including auto trips with passengers, dominate the trips through the CA area, walking and biking trips account for between 6-7 percent of the trips taken. This not only shows a current desire for active transportation, but an opportunity to increase this share if infrastructure improvements can enhance the connectivity, safety, and accessibility for walkers and cyclists across I-64. *(pages 68 and 69)*

---

[i] Crime Index is a measure of relative risk in an area compared to the country (set at 100) as a whole. It is not a database of actual crimes. Updated semiannually, the index combines several sub-categories of both personal and property crimes.
Source: ESRI, 2021.
Methodology: https://appliedgeographic.com/wp-content/uploads/2021/11/AGS-CrimeRisk-Methodology-2021B.pdf

Appendix G.2
Economic and Market Scan, People & Neighborhood Assessment

I-64 PEL Study
COMMUNITY ASSESSMENT BASELINE

**Economic and Market Scan,
People & Neighborhood Assessment**
May 2022

FUTURE 64
COMMUNITY.
TRANSPORTATION.
TOGETHER.

KINGSHIGHWAY TO JEFFERSON

DEVELOPMENTSTRATEGIES®

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People & Neighborhoods

Economy & Market

People & Neighborhoods

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Transportation Equity

- Neighborhood Assessment

- Vulnerable Populations

Community Assessment Framework

Introduction to Study Area

Market & Economy

People & Neighborhoods

Legend:
- Community Assessment (CA) Boundaries
- Tier 2
- Tier 1 (MoDOT ROW)
- Neighborhood Boundaries

N

0 — Half Mile

1:35,000
1 inch: 2,917 ft.

INTRODUCTION TO STUDY AREA
KEY METRICS – REGION, ADJOINING COUNTY, CITY

St. Louis County

St. Louis City

I-64

MSA

Sources: ESRI 2022, Development Strategies
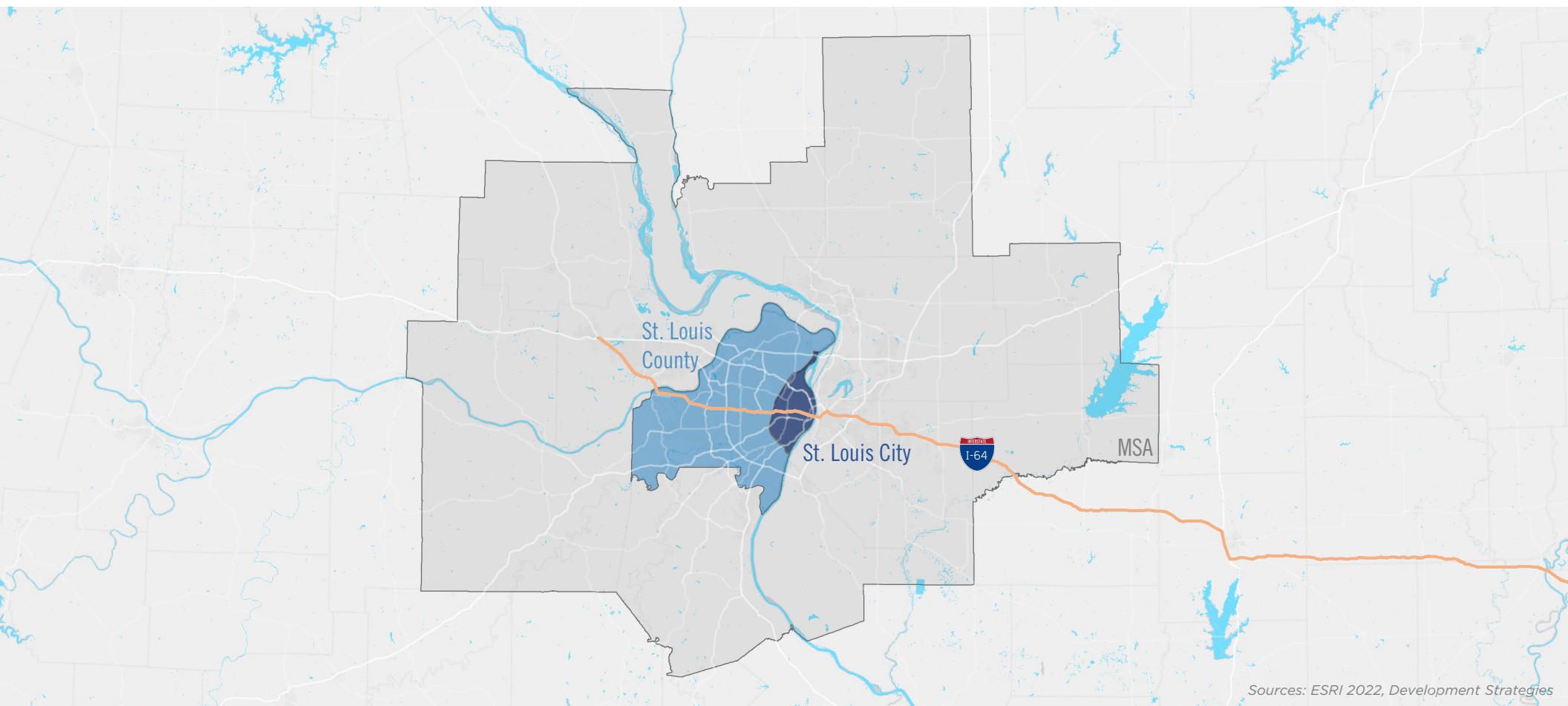
KEY METRICS	ST. LOUIS MSA	ST. LOUIS COUNTY	ST. LOUIS CITY
Population	2,843,000	997,500	309,000
Employment	1,409,000	628,000	249,000
Population Growth (2010-21)	2.0%	(0.2%)	(3.2%)
Median Household Income	$65,900	$70,000	$48,000
Total Households	1,274,000	444,500	176,000

INTRODUCTION TO STUDY AREA
KEY METRICS – CITY, COMMUNITY ASSESSMENT BOUNDARY, TIER 2 BOUNDARY

Sources: ESRI 2022, Development Strategies
*Jobs total 37,800 in 2019 according to OntheMap US Census Bureau (2022)
LEHD Origin-Destination Employment Statistics (2002-2019)

KEY METRICS	ST. LOUIS CITY	COMMUNITY ASSESSMENT BDRY	TIER 2 BDRY
Population	309,000	42,100	4,300
Employment	249,000	57,600	26,900*
Population Growth (2010-21)	(3.2%)	3.3%	18.7%
Median Household Income	$48,000	$49,300	$37,700
Total Households	176,000	24,300	2,500

8

Community Assessment Framework

Introduction to Study Area

Market & Economy

People & Neighborhoods

Community Assessment Framework
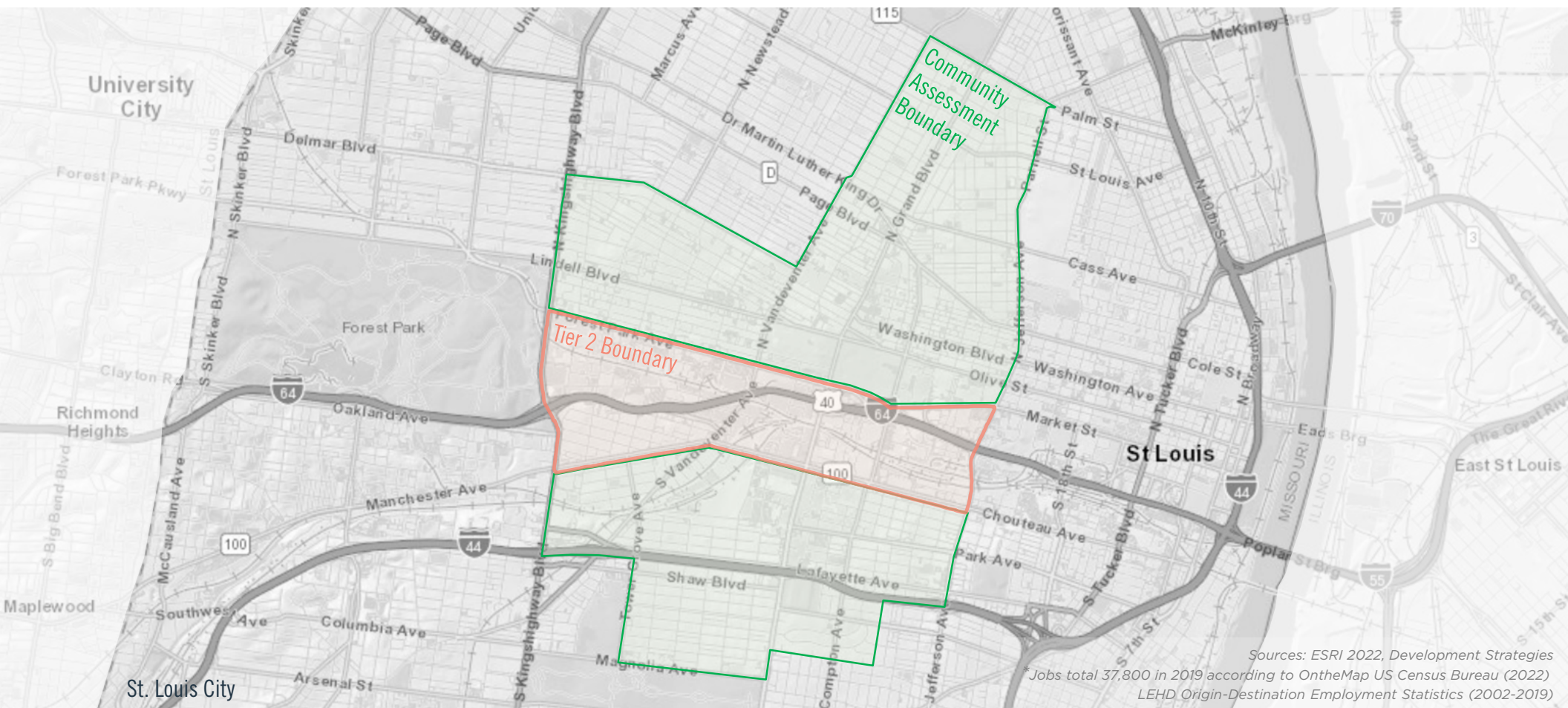
Introduction to Study Area

Market & Economy

People & Neighborhoods

Regional Economic Overview

REGIONAL ECONOMY
KEY INDUSTRY SECTORS

LOCATION QUOTIENT, ST. LOUIS MSA, 2021
Compared to National Employment Distribution
US Average = 1.0
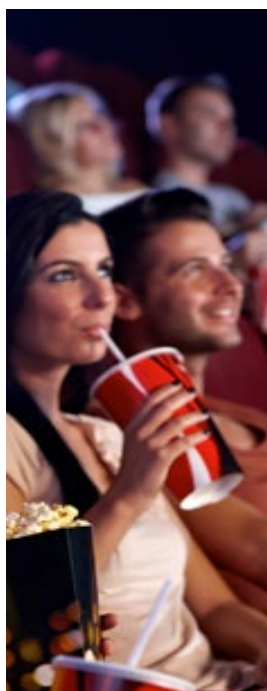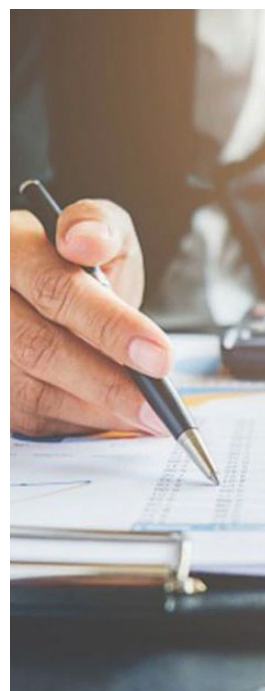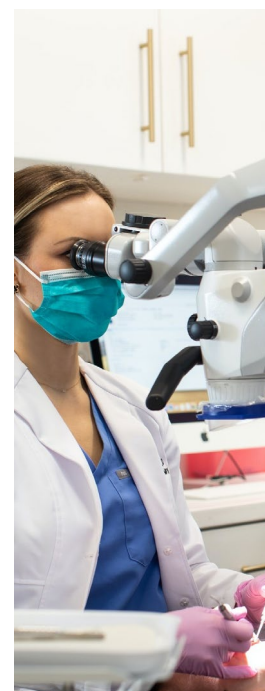
Transportation & Warehousing	Manufacturing	Arts, Entertainment, & Recreation	Finance & Insurance	Management of Companies	Healthcare & Social Assistance	Educational Services
1.20	1.18	1.13	1.10	1.10	1.05	1.02

Based on location quotient, the St. Louis regional economy is **well-diversified with no significant concentrations** (or deficiencies) in employment by sector. The sectors with the highest relative concentrations of employment compares to the national average are Transportation and Warehousing and Manufacturing. The region also has an above average concentration of Finance and Insurance, Management of Companies, and Healthcare jobs.

REGIONAL ECONOMY
EMPLOYMENT TRENDS

Relative Employment Change, 2001-2020
Source: BEA
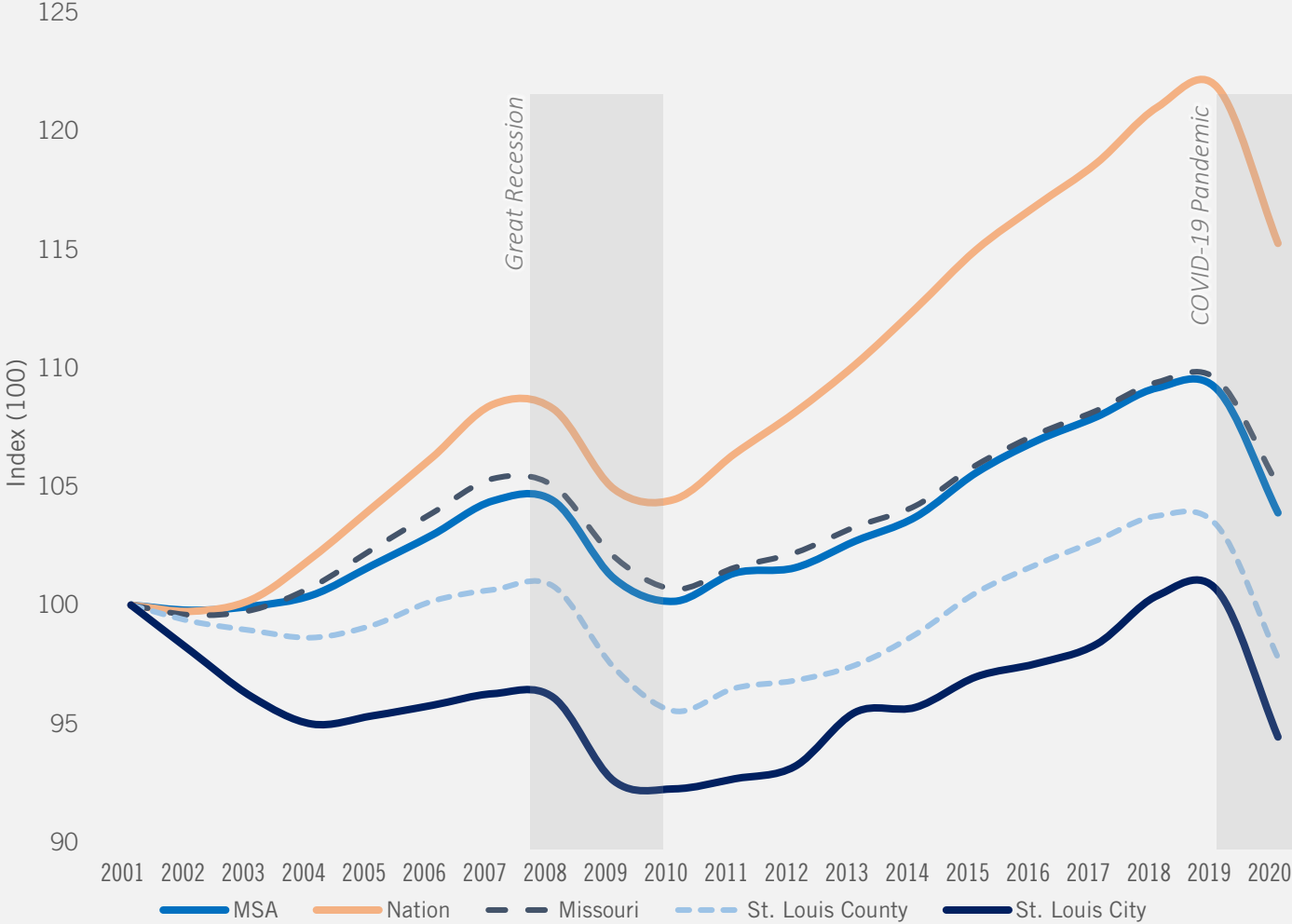
Prior to the COVID-19 pandemic, economic growth in the St. Louis MSA had been relatively slow from 2010 to 2019 with total employment growth of 8.9 percent. This is considerably slower than the national growth rate of 16.9 percent, but generally consistent with statewide economic growth.

Total employment growth in the city of St. Louis also followed regional trends during this time period, although the city was more adversely impacted by the pandemic. The city lost 6.1 percent of total employment from 2019 to 2020, compared to losses of 4.8 percent in the region and 5.4 percent nationally.

	Pre-Recession 2001-2008	Recession 2008-2010	Post-Recession 2011-2019	COVID-19 2019-2020
St. Louis City	**-3.9%**	**-4.0%**	**8.5%**	**-6.1%**
St. Louis County	0.8%	-5.2%	7.1%	-5.4%
St. Louis MSA	4.4%	-4.1%	7.6%	-4.8%
Missouri	5.0%	-4.1%	7.8%	-4.1%
United States	8.3%	-3.5%	14.5%	-5.4%

Change in Employment, 2010-2019
City of St. Louis
Source: BEA

Sector	Change
Educational services	10,298
Health care and social assistance	9,323
Professional, scientific, and technical services	4,615
Accommodation and food services	2,942
Finance and insurance	2,806
Management of companies and enterprises	1,547
Other services	(97)
Arts, entertainment, and recreation	(162)
Real estate and rental and leasing	(207)
Administrative and support	(450)
Retail trade	(551)
Wholesale trade	(669)
Information	(1,556)
Manufacturing	(1,580)
Government	(4,337)

24,000
NET NEW JOBS

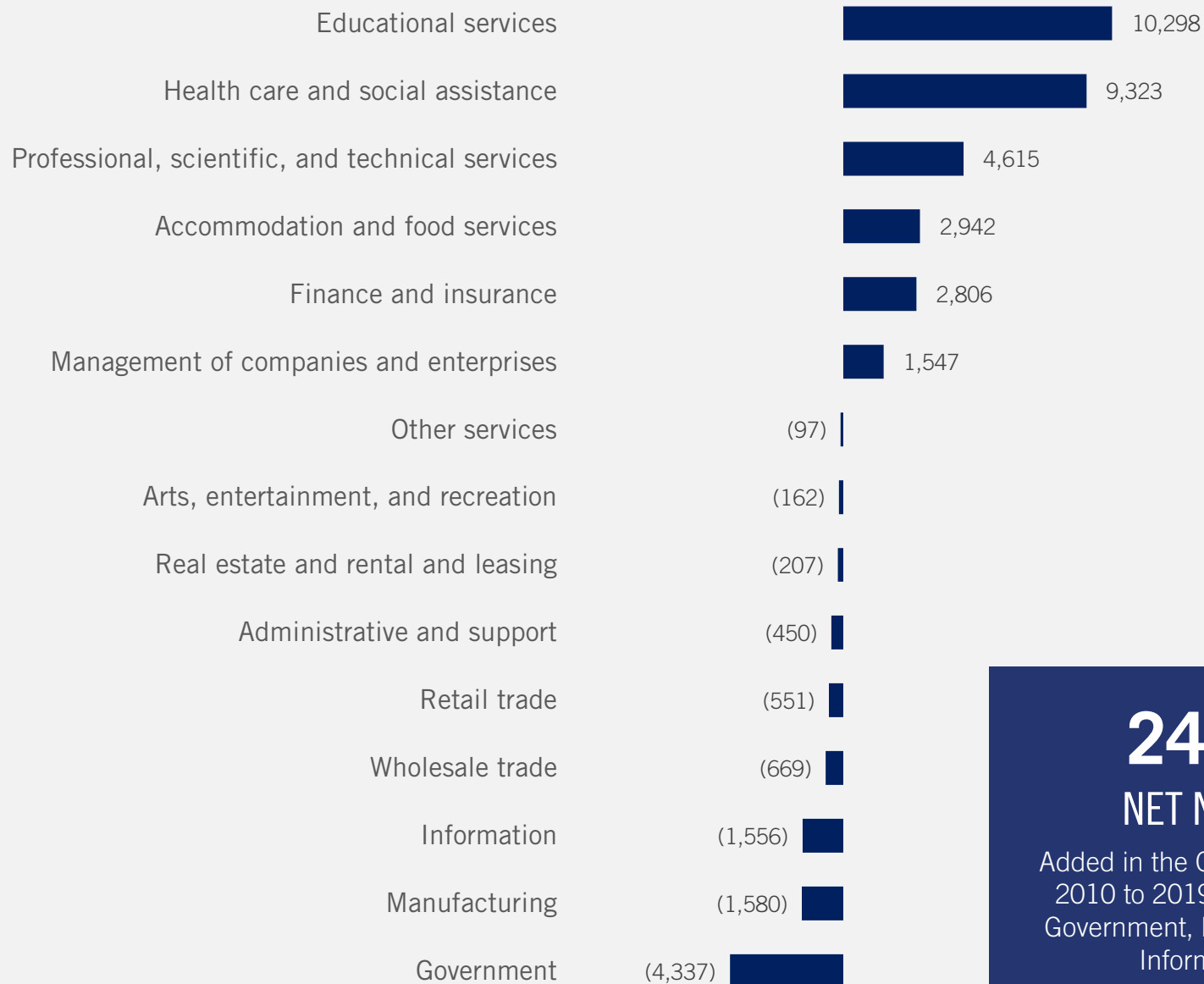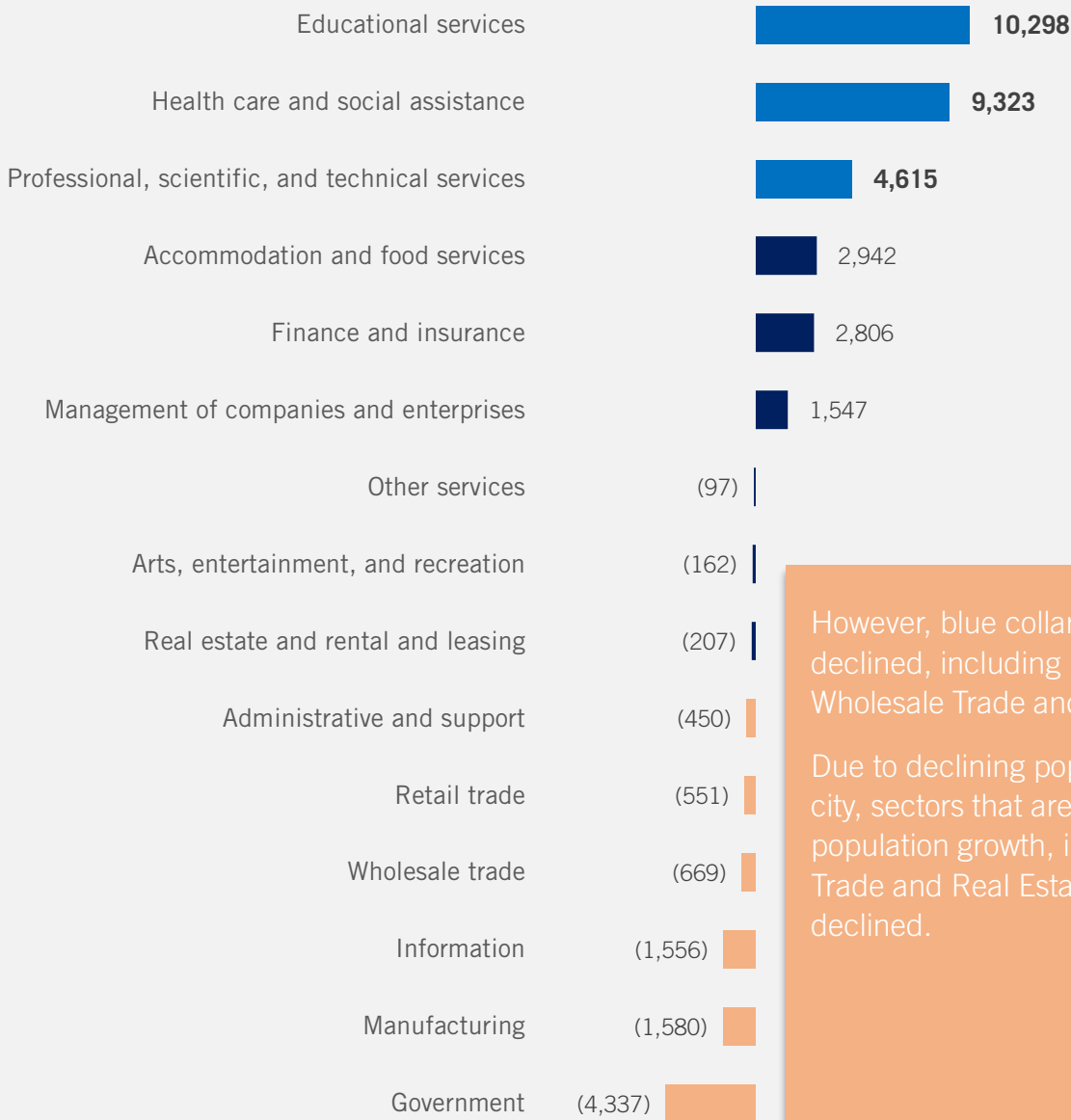Added in the City of St. Louis from 2010 to 2019, despite losses of Government, Manufacturing, and Information jobs.

REGIONAL ECONOMY
EMPLOYMENT TRENDS BY SECTOR – CITY OF ST. LOUIS

Change in Employment, 2010-2019
City of St. Louis
Source: BEA

Sector	Change
Educational services	10,298
Health care and social assistance	9,323
Professional, scientific, and technical services	4,615
Accommodation and food services	2,942
Finance and insurance	2,806
Management of companies and enterprises	1,547
Other services	(97)
Arts, entertainment, and recreation	(162)
Real estate and rental and leasing	(207)
Administrative and support	(450)
Retail trade	(551)
Wholesale trade	(669)
Information	(1,556)
Manufacturing	(1,580)
Government	(4,337)

CORE KNOWLEDGE SECTORS

Job growth in the city was in three of the top "core" knowledge sectors—Education, Healthcare, and Professional/Scientific services. The growth in Educational service jobs could be attributed to employment growth at local institutions, including St. Louis University, but also from a reclassification of jobs at Washington University's medical campus.

Generally, knowledge sector employment growth in the city has followed national trends.

However, blue collar jobs have declined, including Manufacturing, Wholesale Trade and Construction.

Due to declining population in the city, sectors that are driven by population growth, including Retail Trade and Real Estate have declined.

Growth Rate 2010-2019
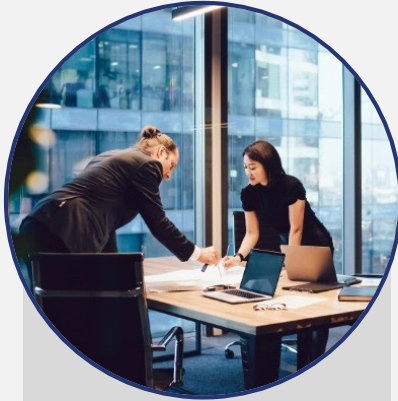
Educational Services
80% City | 20% National

Professional & Technical Services
26% City | 23% National

Healthcare Services
21% City | 21% National

THE ST. LOUIS METRO IS HOME TO
FIVE STRONG CLUSTERS
THAT HAVE POTENTIAL TO DRIVE GROWTH IN THE FUTURE

ADVANCED BUSINESS SERVICES

A large finance and insurance sector with both retail-banking and investment services. This cluster benefits from close connections to the IT and software industry that advance the growing fintech ecosystem in the metro.

BIOMEDICAL AND HEALTH SERVICES

An advanced biomedical and pharmaceutical cluster that benefits from proximity to medical institutions and bioscience / agtech startups that use technology to create new products and services.

ADVANCED MANUFACTURING & PRODUCTION

A broad cluster of small-scale production and manufacturing. This cluster includes advanced software engineering, manufacturing, consumer products and food production.

AEROSPACE AUTOMOTIVE & DEFENSE

Anchored by Boeing and GM advanced manufacturing plants, this cluster gives the metro an edge in large-scale manufacturing, servicing and advanced production of defense technology.
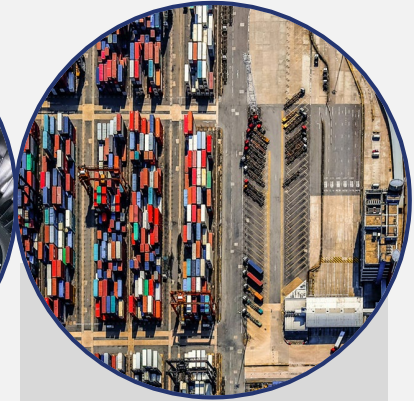
TRANSPORTATION AND LOGISTICS

This cluster serves the metro's industries as well as global multimodal freight movement. It is growing and creating jobs that pay well.

Greater St. Louis Inc.'s STL 2030 Jobs Plan identified five target clusters with the most potential to drive the regional economy. Given the presence of CORTEX and Washington University Medical Campus, the Study Area is positioned to facilitate growth in two of these clusters: Advanced Business Services and Biomedical and Health Services

Source: The STL 2030 Jobs Plan, New Localism Associates, 2021

Community Assessment Framework

Introduction to Study Area

Market & Economy

People & Neighborhoods

Study Area Economic Trends

STUDY AREA ECONOMIC TRENDS
EMPLOYMENT TRENDS – TIER 2 STUDY AREA

Relative Employment Change
2002-2019
Source: OnTheMap

Index (100)

150 — 140 — 130 — 120 — 110 — 100 — 90

2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

—— Study Area (Tier 2) —— MSA - - - Rest of City
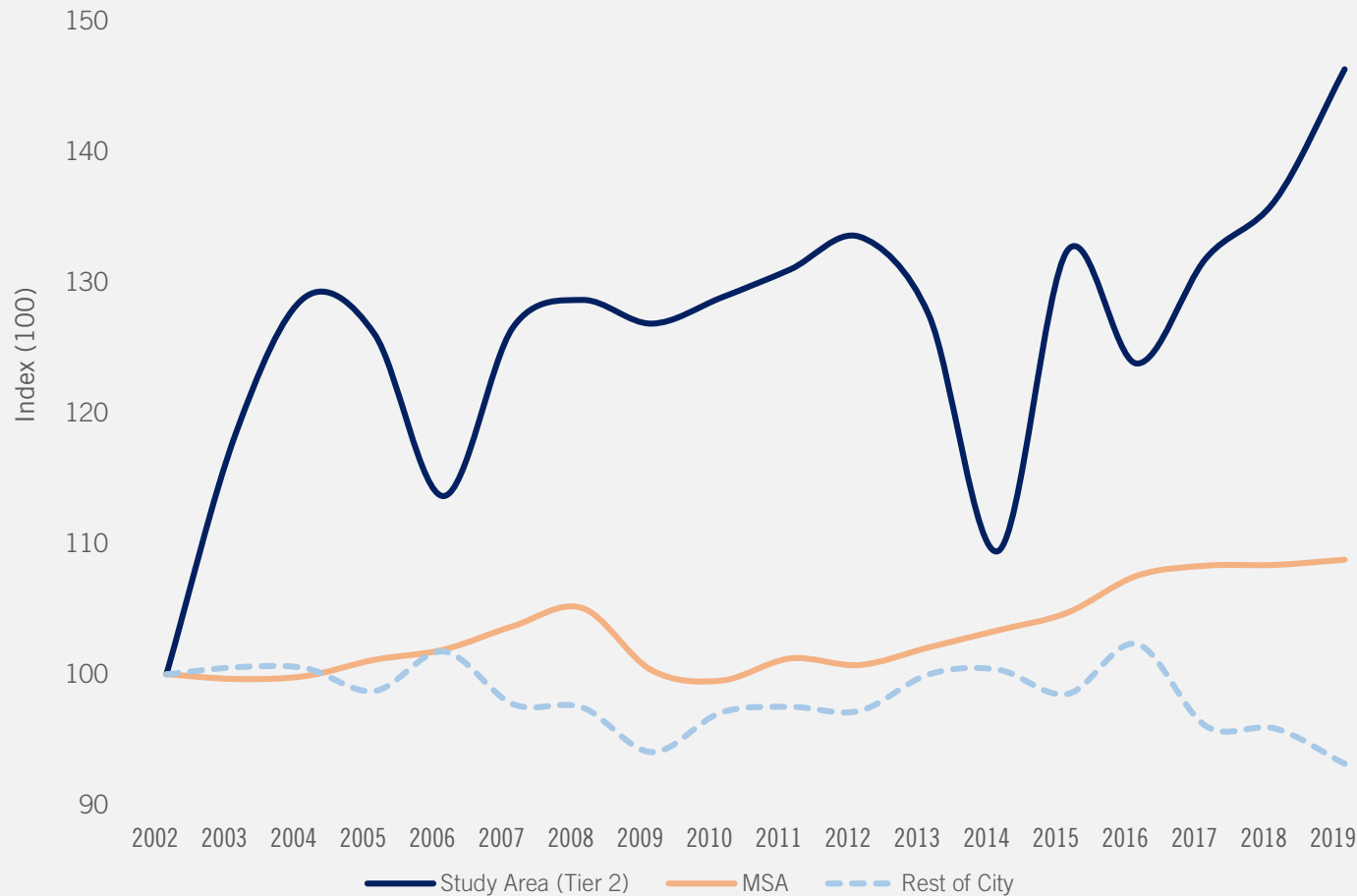
As presented previously, employment growth in the city been relatively slow and has been outpaced by regional employment growth. Most of the new office, industrial, and retail development in the region over the last 10 to 20 years has been out side of the city boundaries.

Despite the citywide economic challenges, employment growth in the Tier 2 Study Area has exceeded citywide and regional employment growth. In fact, employment growth has declined in the city outside of the Tier 2 Study Area boundaries. According to OnTheMap, from 2010 to 2019, Tier 2 Study Area has added just under 4,300 jobs for an increase of around 14 percent, while the MSA experienced employment growth of nine percent and the reaming areas of the city outside of the Study Area had a decrease of four percent.

TIER 2
RELATIVE EMPLOYMENT GROWTH

2002-19 **47**%

VS **9**% IN THE REGION **-7**% REST OF CITY

STUDY AREA ECONOMIC TRENDS
EMPLOYMENT BY SECTOR – TIER 2 STUDY AREA

Employment by Sector, 2022
Tier 2 Study Area
Source: ESRI

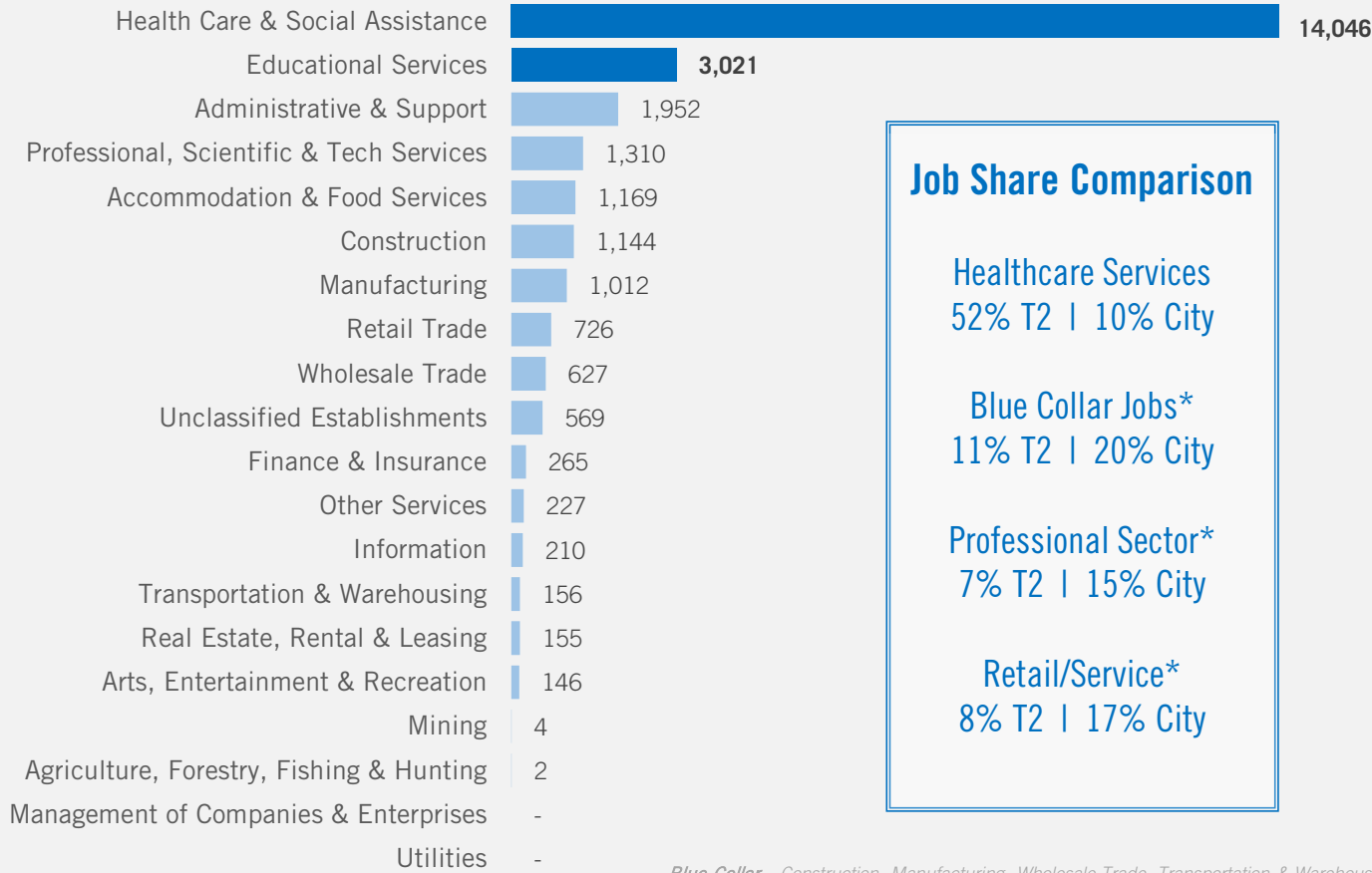| Sector	Jobs
Health Care & Social Assistance	14,046
Educational Services	3,021
Administrative & Support	1,952
Professional, Scientific & Tech Services	1,310
Accommodation & Food Services	1,169
Construction	1,144
Manufacturing	1,012
Retail Trade	726
Wholesale Trade	627
Unclassified Establishments	569
Finance & Insurance	265
Other Services	227
Information	210
Transportation & Warehousing	156
Real Estate, Rental & Leasing	155
Arts, Entertainment & Recreation	146
Mining	4
Agriculture, Forestry, Fishing & Hunting	2
Management of Companies & Enterprises	-
Utilities	-

Job Share Comparison

Healthcare Services
52% T2 | 10% City

Blue Collar Jobs*
11% T2 | 20% City

Professional Sector*
7% T2 | 15% City

Retail/Service*
8% T2 | 17% City

Blue Collar – Construction, Manufacturing, Wholesale Trade, Transportation & Warehousing
Professional – Information, Finance & Insurance, Prof. & Technical Services, Management
Retail/Service – Retail Trade, Food & Accommodation, Other Services

According to ESRI, the Tier 2 Study Area has nearly 27,000 employees representing nearly 11 percent of citywide employment. The majority (52 percent) of these jobs are in Health Care and Social Assistance given the presence of the Washington University Medical Campus.

There is also a concentration of Educational Services jobs (3,021), Administrative Support jobs (1,952) and Professional, Scientific, and Technical Services jobs (1,310) that could be attributed to the medical infrastructure as well as CORTEX.

In addition to these professional sector jobs, the Tier 2 Study Area economy is relatively diverse and includes nearly 3,000 blue collar sector jobs in Construction, Manufacturing, and Wholesale Trade.

TIER 2 BOUNDARY HAS

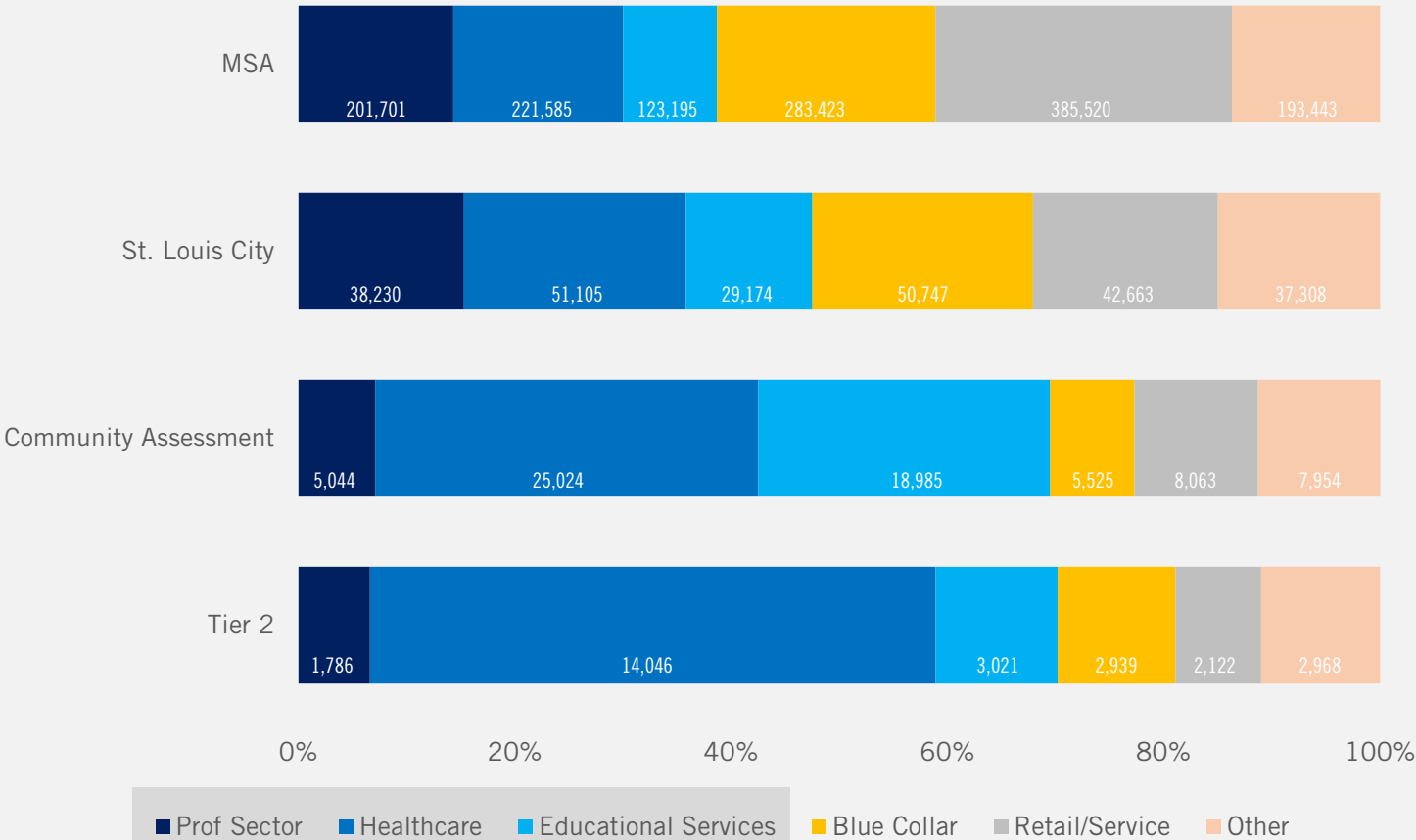**57**% OF THE HEALTHCARE JOBS IN THE CITY

10% OF THE HEALTHCARE JOBS IN THE REGION

THE TIER 2 STUDY AREA IS A
REGIONAL HUB OF "NEW ECONOMY" JOBS
THAT ARE GROWING NATIONALLY

Employment Share by Area 2021
Source: ESRI 2021

Area	Prof Sector	Healthcare	Educational Services	Blue Collar	Retail/Service	Other
MSA	201,701	221,585	123,195	283,423	385,520	193,443
St. Louis City	38,230	51,105	29,174	50,747	42,663	37,308
Community Assessment	5,044	25,024	18,985	5,525	8,063	7,954
Tier 2	1,786	14,046	3,021	2,939	2,122	2,968

■ Prof Sector ■ Healthcare ■ Educational Services ■ Blue Collar ■ Retail/Service ■ Other

KNOWLEDGE SECTOR

BUSINESS SECTOR DEFINITIONS
Knowledge Sector
Healthcare and Social Assistance, Educational Services, Information, Finance & Insurance, Prof. & Technical Services, Management of Companies
Blue Collar
Construction, Manufacturing, Wholesale Trade, Transportation & Warehousing
Retail/Service
Retail Trade, Food & Accommodation, Other Services

When considering Professional Sectors, Healthcare, and Educational Services jobs, more than 70 percent of the jobs in the study area are "knowledge sector" jobs compared to a regional share of just under 39 percent. This demonstrates the competitive positioning of the study area as a regional hub of "new economy" jobs that are growing nationally.
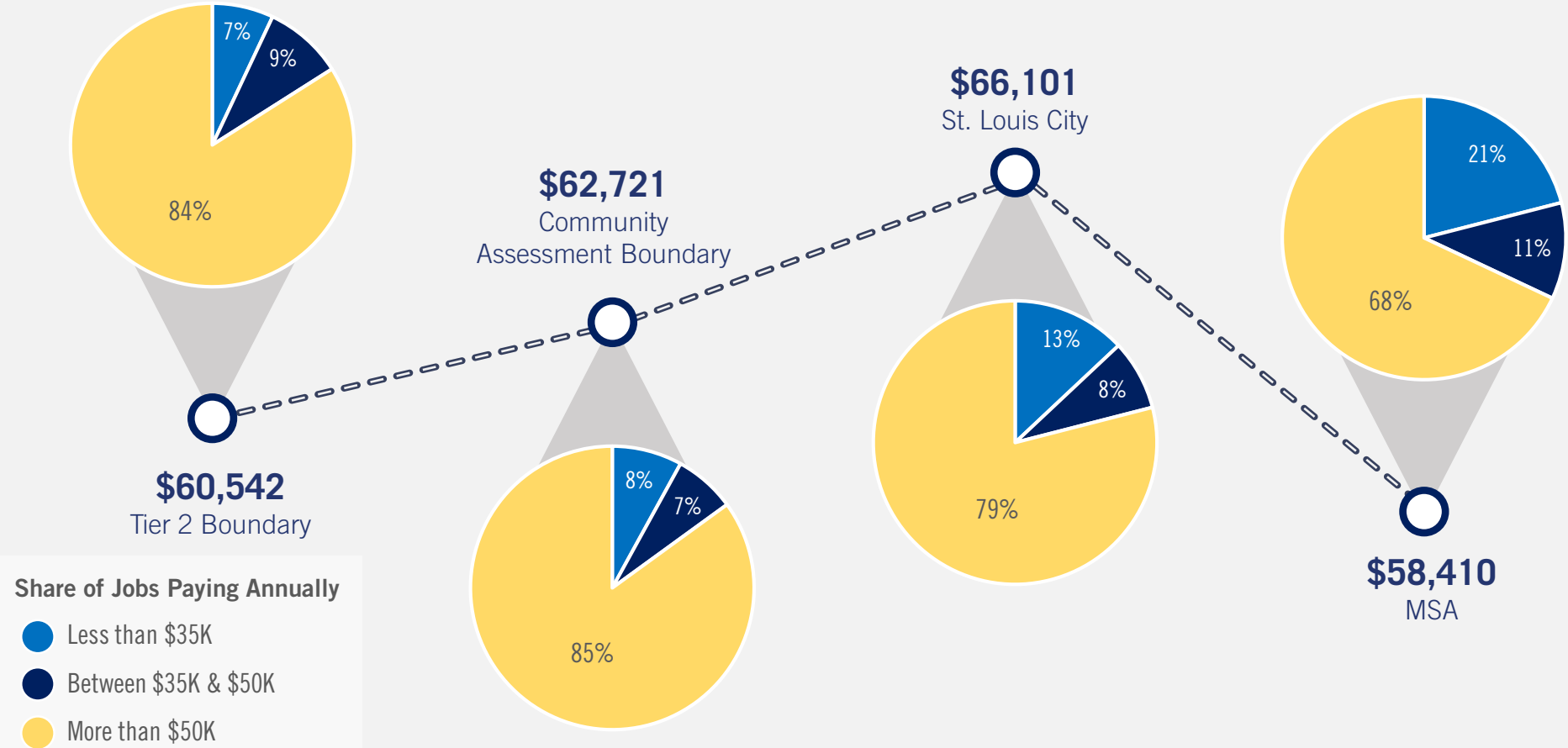
While the study area has some industrial land uses concentrated along the rail corridor, it continues to experience a shift from a Blue Collar workforce to a knowledge-based workforce. Most industrial real estate growth, especially for logistics and warehousing, has occurred in lower density areas of the region.

STUDY AREA ECONOMIC TRENDS
EMPLOYMENT BY INCOME

Average Wage
Source: ESRI 2021, QCEW by Industry 2020 (MERIC)

$60,542
Tier 2 Boundary

7%
9%
84%

$62,721
Community
Assessment Boundary

8%
7%
85%

$66,101
St. Louis City

13%
8%
79%

$58,410
MSA

21%
11%
68%

Share of Jobs Paying Annually
- Less than $35K
- Between $35K & $50K
- More than $50K

Based on distribution of employment by sector and average wages by sector, the average wage for workers in Tier 2 is just over $60,500, which is slightly below the city average, but higher than the regional average. More importantly, there is a much higher proportion of jobs that pay more than $50,000 annually in Tier 1 (84 percent) compared to 79 percent in the city and only 68 percent in the region.

Only seven percent of the jobs in Tier 1 pay less than $35,000, which can be attributed to the relatively low share of food service and retail jobs compared to the regional average. By comparison, 13 percent of the jobs in the city and 21 percent of the jobs in the region pay less than $35,000.

STUDY AREA ECONOMIC TRENDS
EMPLOYMENT DISTRIBUTION

Businesses by Sector
- ● Knowledge Sector
- ● Blue Collar
- ● Retail/Service
- ● Other

Number of Employees
- · <5
- ● 5 to 20
- ● 20 to 100
- ● 100 to 500
- ● >500

Map labels: WashU Medical Campus · CORTEX · IKEA · VA Medical Center · St. Louis University · Wells Fargo · Millipore Sigma · Manchester Avenue "The Grove" · SLU Medical Group · St Clair

Source: ESRI Business Analyst Data 2016 sourced from InfoGroup Business Listings, Development Strategies 2022

BUSINESS SECTOR DEFINITIONS
Knowledge Sector
Healthcare and Social Assistance, Educational Services, Information, Finance & Insurance, Prof. & Technical Services, Management of Companies
Blue Collar
Construction, Manufacturing, Wholesale Trade, Transportation & Warehousing
Retail/Service
Retail Trade, Food & Accommodation, Other Services

The highest concentrations of employment are in and around the Washington University Medical Campus on the west side of the study area that include the BJC Medical Center. There are also a concentrations of retail jobs along the Manchester Avenue ("The Grove") and Forest Park avenue corridors.

The center portions of the study area include CORTEX which has an estimated 6,000 workers with plans for expansion.

East of Cortex is Ikea with 400 workers and the St. Louis University campus that includes university staff and its environs that include complementary retail uses.

STUDY AREA ECONOMIC TRENDS
KEY REGIONAL ANCHORS

1. BJC Healthcare

Visits: 434,000
Visitors: 178,400
Bed Count: 1,275
Employees: 9,200
Patient Revenue: $6.5 Billion
Non-Patient Revenue: $154 Million
Total Revenue: $6.7 Billion
Total Patient Days: 346, 400

2. WashU Medical School & Center

Visits: 629,400
Visitors: 239,700
Bed Count: 2,040
Patient/hospital revenues: $1.6 Billion
Other revenue: $300 Million
Tuition & fees Revenues: $452 Million
Employees: 21,000
Students: 1,350
Faculty: 2,630

3. SSM Health St. Louis University Hospital

Beds: 365 (adding 316 patient rooms with an investment of $550 Million)
Total Patient Revenue: $2.6 Billion
Students: 700
Faculty: 550
Residents: 550

4. Companies in Cortex

200-acre hub of business, innovation, and technology
Expansion to 4 million+ square feet of new rehabilitated facilities
425 Companies (Expansion to 600+)
11 Innovation Centers/Activators (Expansion to14+)
$950 million in leveraged investments in neighborhood retail and residential development
Employees: 6,000
Permanent Jobs Created: 15,000
Revenue Generated: $40 Million
Economic output to St Louis: $2.1 Billion
30-year TIF revenues projected: $775 Million

5. Grand Center

Landmark Destination for arts and culture
60+ Arts and Cultural organizations
16 theaters
12, 000 theater seats
17 museums/galleries
10 music venues
18 event space rentals
22 bars/restaurants
4 religious institutions
2 Hotels
Nearly 2 million patrons filter the area annually
Annual Revenue: $1.2 Million

6. St. Louis University

Student Population: 13,300
Academic Staff: 2,270
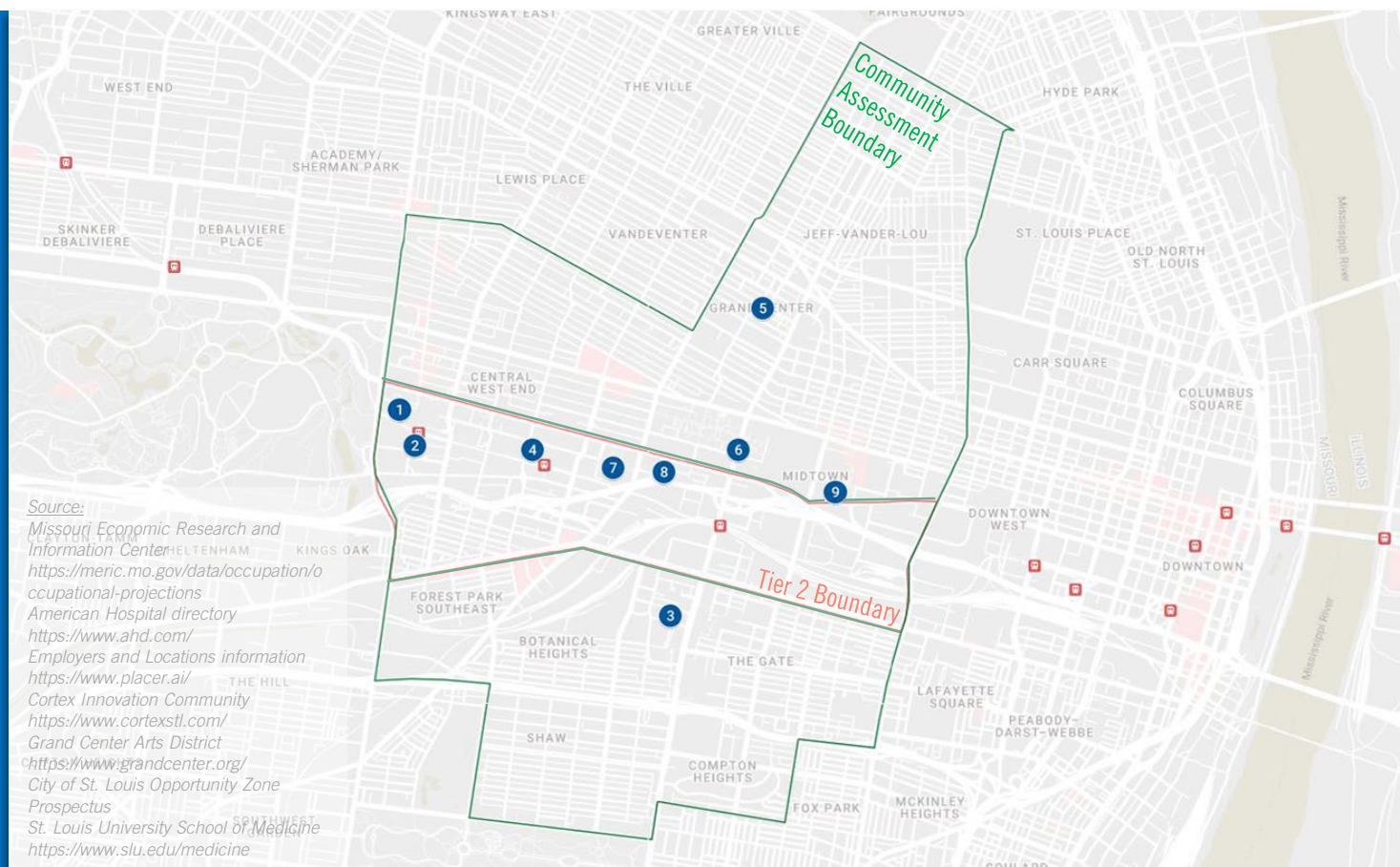Administrative Staff: 6,000
Revenue: $775 Million

7. IKEA

Visits: 103,700
Visitors: 94,900
Employees: 400
Store Square Footage: 380,000
Annual Revenue: $100 million

8. City Foundry

Weekly Visitors: 62,000
Restaurants: 11 kitchens
Square Footage: 300,000
400 Seats

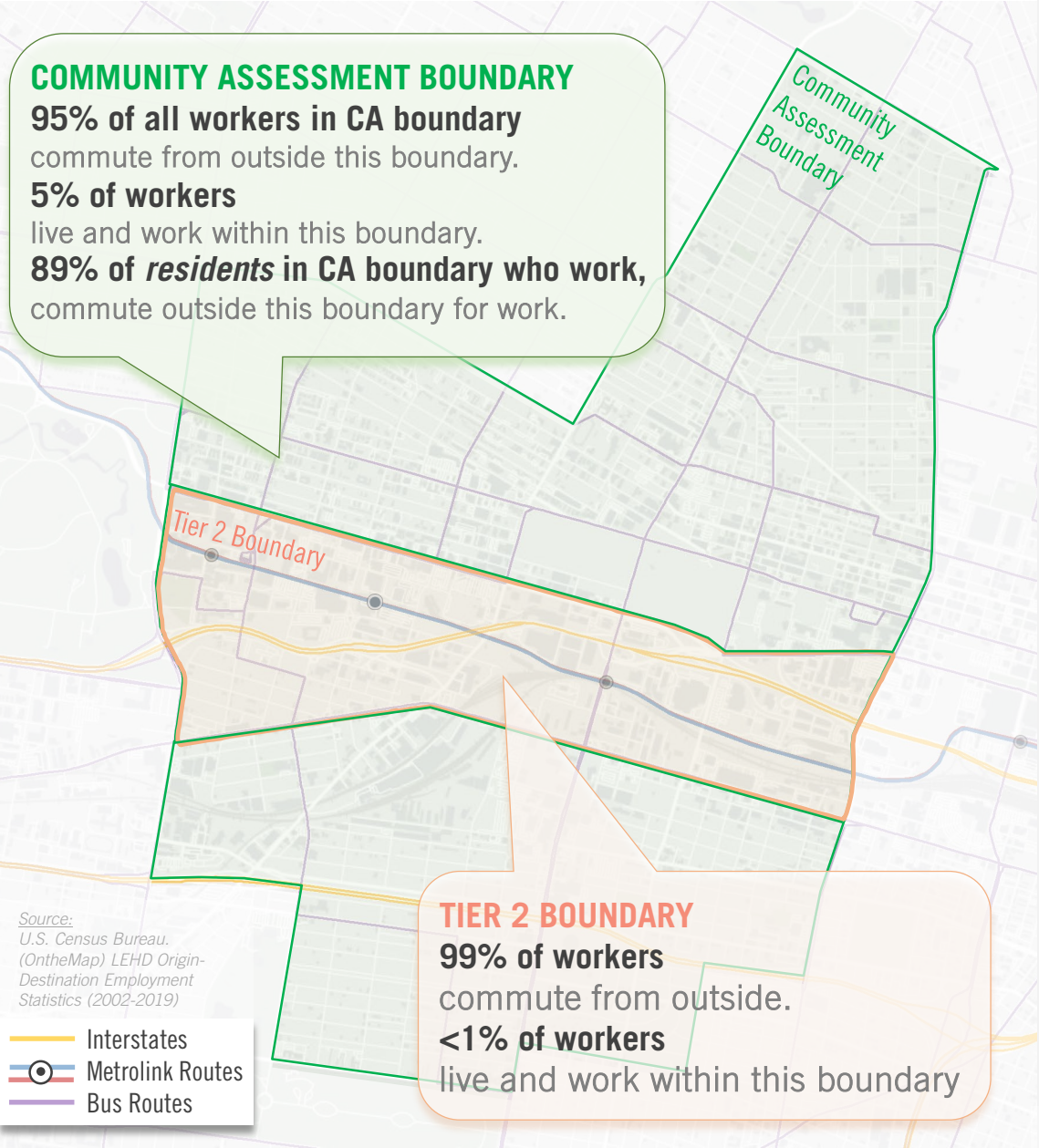## 9. Harris Stowe State University

Students: 1,630
Faculty: 367
Visits: 26,000
Visitors: 7,500
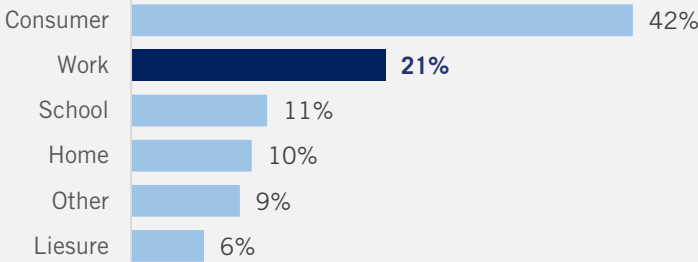Endowment Revenue: $1.4 Million
Annual Revenue: $60 Million

Source:
Missouri Economic Research and Information Center
https://meric.mo.gov/data/occupation/occupational-projections
American Hospital directory
https://www.ahd.com/
Employers and Locations information
https://www.placer.ai/
Cortex Innovation Community
https://www.cortexstl.com/
Grand Center Arts District
https://www.grandcenter.org/
City of St. Louis Opportunity Zone Prospectus
St. Louis University School of Medicine
https://www.slu.edu/medicine

COMMUNITY ASSESSMENT BOUNDARY

95% of all workers in CA boundary commute from outside this boundary.

5% of workers live and work within this boundary.

89% of *residents* in CA boundary who work, commute outside this boundary for work.

Community Assessment Boundary

Tier 2 Boundary

TIER 2 BOUNDARY

99% of workers commute from outside.

<1% of workers live and work within this boundary

Source:
U.S. Census Bureau. (OntheMap) LEHD Origin-Destination Employment Statistics (2002-2019)
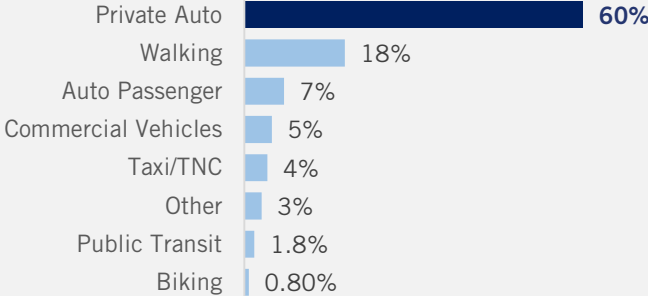
Legend:
— Interstates
— Metrolink Routes
— Bus Routes

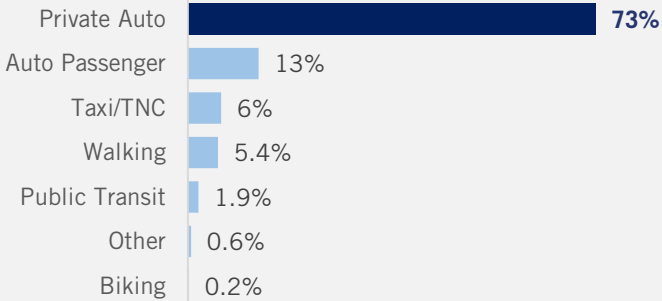*On a typical workday, **~63K trips** are made by **~40K people** with **Tier 2 boundary** as destination*

Trip Purpose

Consumer	42%
Work	21%
School	11%
Home	10%
Other	9%
Liesure	6%

Mode Share for all Trips

Private Auto	60%
Walking	18%
Auto Passenger	7%
Commercial Vehicles	5%
Taxi/TNC	4%
Other	3%
Public Transit	1.8%
Biking	0.80%

Mode Share for Work Trips

Private Auto	73%
Auto Passenger	13%
Taxi/TNC	6%
Walking	5.4%
Public Transit	1.9%
Other	0.6%
Biking	0.2%

Source: REPLICA, 2021

99 percent of the workforce in Tier 2 commute into the area, which can be attributed to the lack of housing stock to meet the needs of the workforce—future housing development will create more opportunities for commuters to walk/bike to work.

Community Assessment Framework

Introduction to Study Area
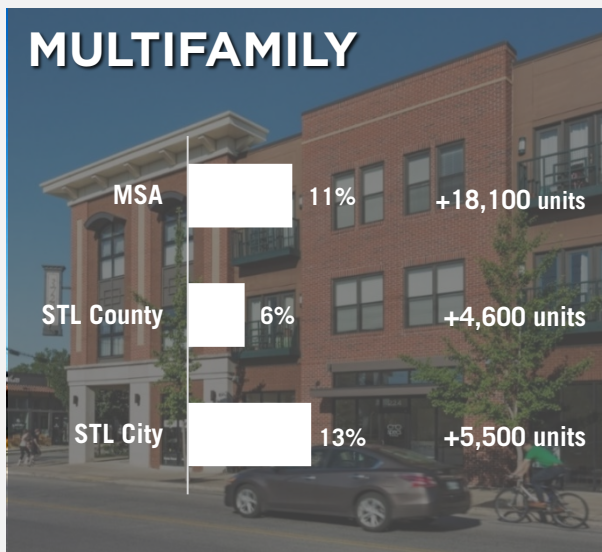
Market & Economy

People & Neighborhoods

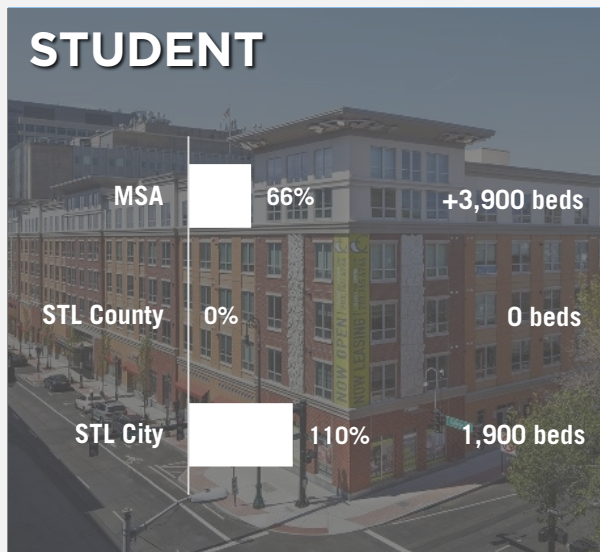# Real Estate Market Overview

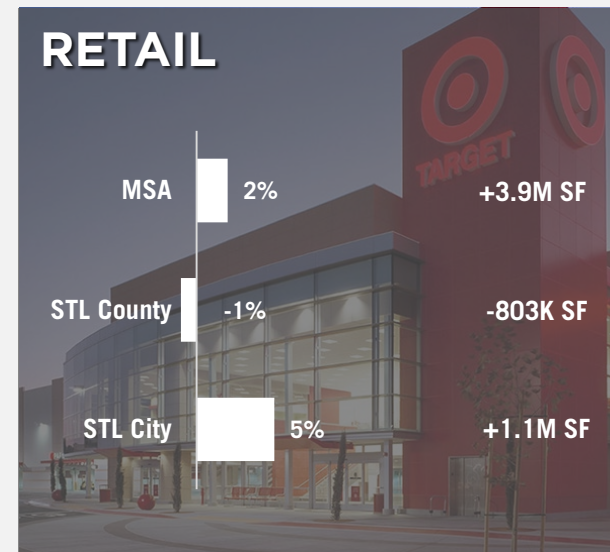# REGIONAL REAL ESTATE OVERVIEW
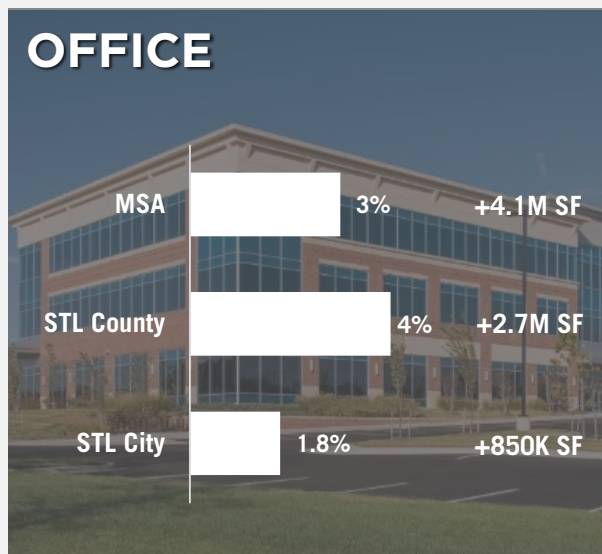## NEW DEVELOPMENT SINCE 2010

SINCE 2010

MULTIFAMILY
MSA	11%	+18,100 units
STL County	6%	+4,600 units
STL City	13%	+5,500 units

STUDENT
MSA	66%	+3,900 beds
STL County	0%	0 beds
STL City	110%	1,900 beds

RETAIL
MSA	2%	+3.9M SF
STL County	-1%	-803K SF
STL City	5%	+1.1M SF

OFFICE
MSA	3%	+4.1M SF
STL County	4%	+2.7M SF
STL City	1.8%	+850K SF

INDUSTRIAL
MSA	8%	+22.7M SF
STL County	11%	+11.4M SF
STL City	-9%	-6.8M SF

HOSPITALITY
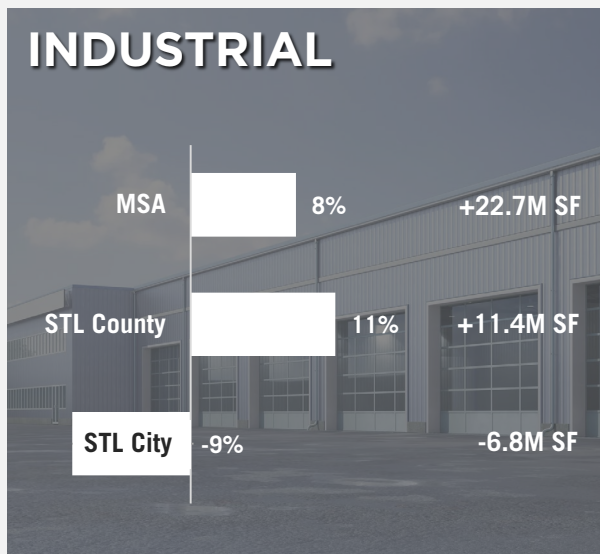|		
MSA	9%	+3,400 rooms
STL County	6%	+1,025 rooms
STL City	13%	+1,200 rooms

Despite the city losing population, 5,500 multi-family housing units have been delivered in the city since 2010, contributing to 30 percent of the new regional supply and outpacing development in the county. Retail and hotel development were strong in the city adding 1.1 million square feet and 1,200 rooms, respectively. The city lost a large share of its industrial building stock due to redevelopment activity. Office development in the city has been relatively limited.
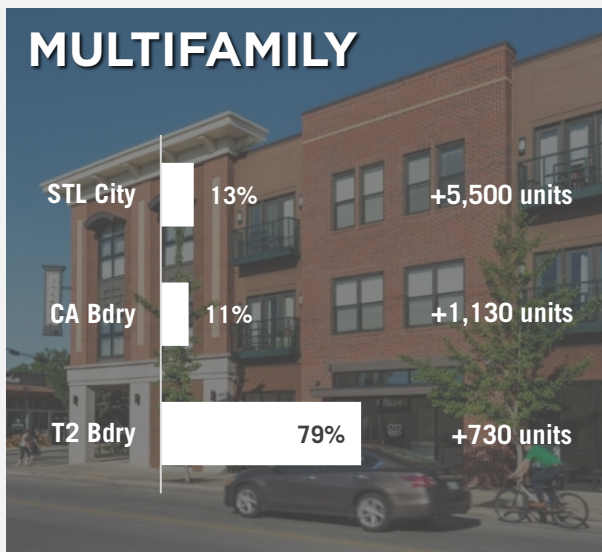
Source: CoStar 2022
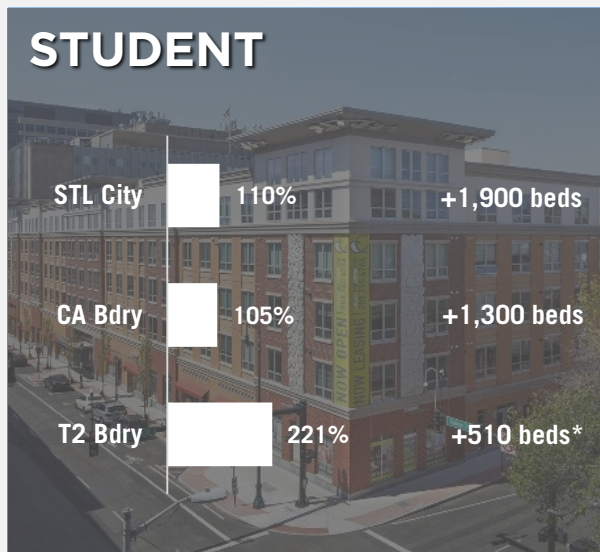
LOCAL REAL ESTATE OVERVIEW
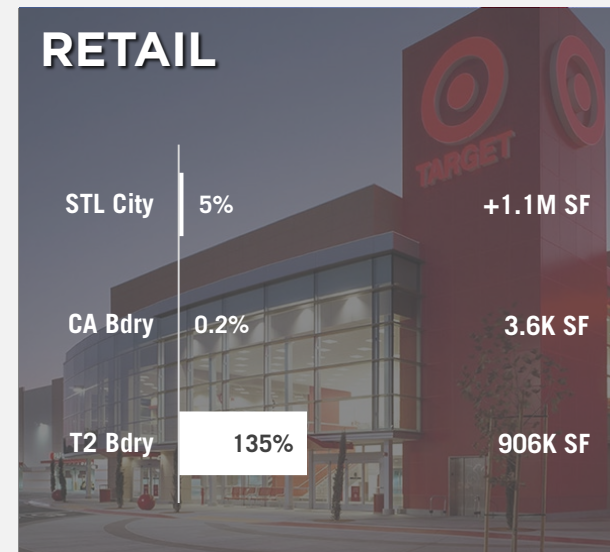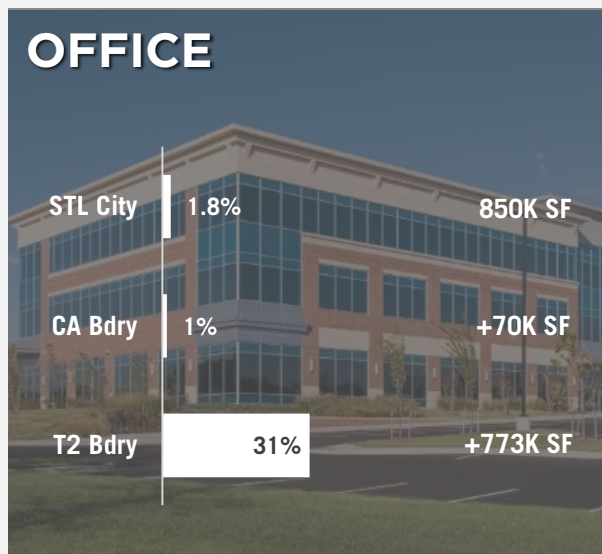## NEW DEVELOPMENT SINCE 2010: STUDY AREAS
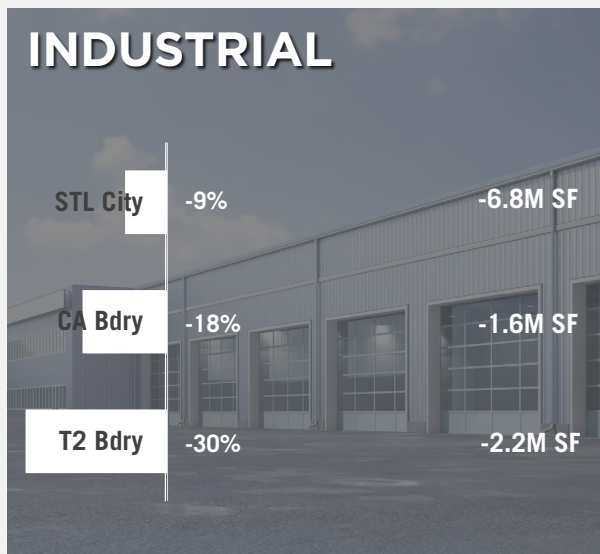
SINCE 2010

MULTIFAMILY

STL City	13%	+5,500 units
CA Bdry	11%	+1,130 units
T2 Bdry	79%	+730 units

STUDENT

STL City	110%	+1,900 beds
CA Bdry	105%	+1,300 beds
T2 Bdry	221%	+510 beds*

RETAIL

STL City	5%	+1.1M SF
CA Bdry	0.2%	3.6K SF
T2 Bdry	135%	906K SF

OFFICE

STL City	1.8%	850K SF
CA Bdry	1%	+70K SF
T2 Bdry	31%	+773K SF

INDUSTRIAL

STL City	-9%	-6.8M SF
CA Bdry	-18%	-1.6M SF
T2 Bdry	-30%	-2.2M SF

HOSPITALITY

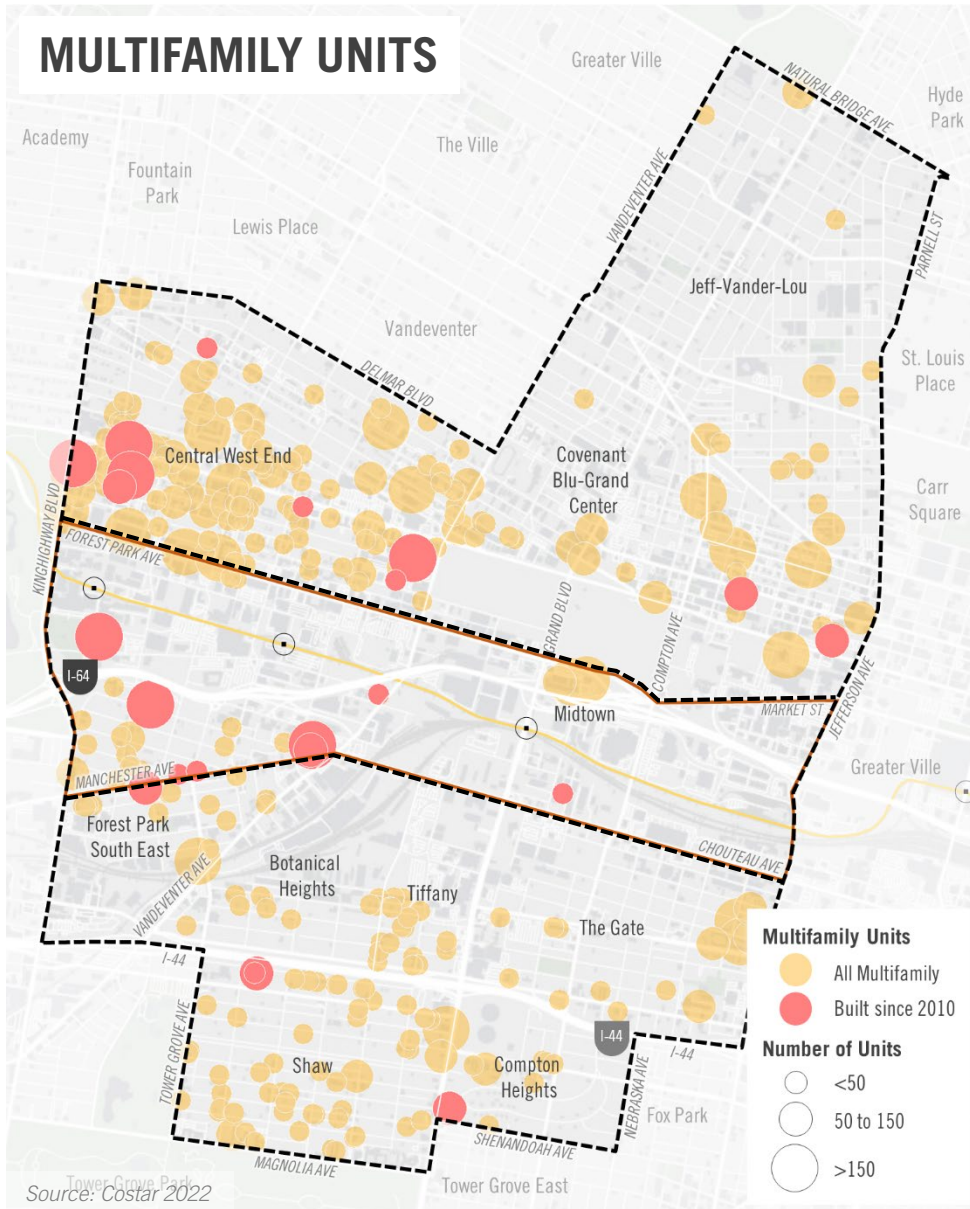|		
STL City	13%	+1,200 rooms
CA Bdry	88%	+520 rooms
T2 Bdry	58%	+240 rooms

A third of the new multifamily units, 95 percent of the new student beds, and all of the new office supply added since 2010 in the city are located within the study areas. The Tier 2 Study Area delivered more than 900,000 square feet of retail (around 80 percent of the city's new retail supply), which can be attributed to IKEA opening in 2014 and Foundry opening in 2021. The study areas lost industrial supply, since no new space was delivered and vacant end-of-life properties were redeveloped into multi-family or other commercial uses.

*510 beds in pipeline
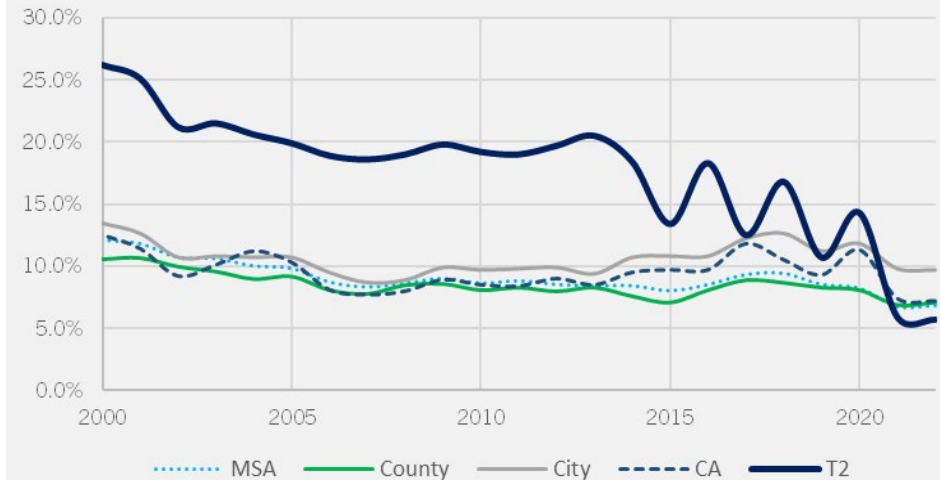Source: CoStar 2022

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REGIONAL REAL ESTATE OVERVIEW
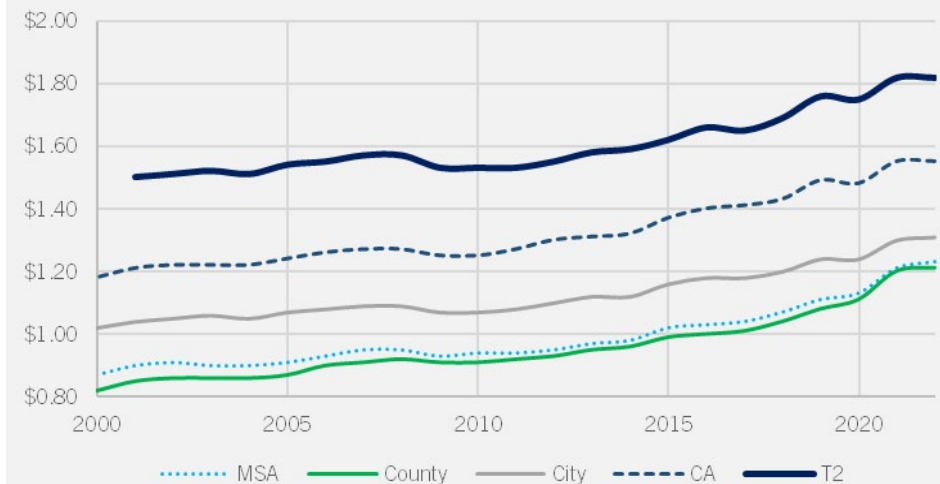## MULTIFAMILY TRENDS

MULTIFAMILY UNITS

Source: Costar 2022

Multifamily Units
- ● All Multifamily
- ● Built since 2010

Number of Units
- ○ <50
- ○ 50 to 150
- ○ >150

Vacancy Rate
Source: Costar

Legend: MSA · County · City · CA · T2

Effective Rent PSF
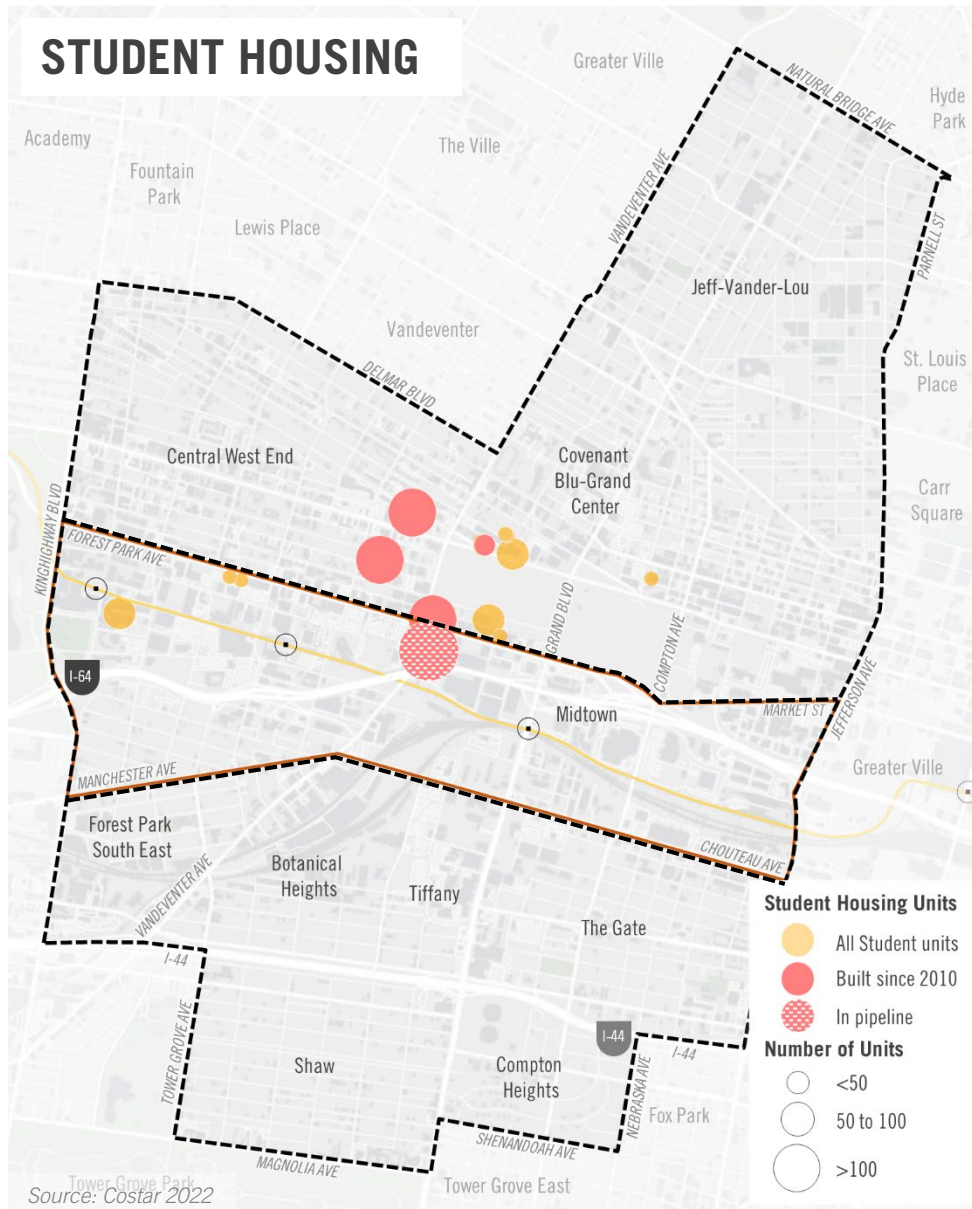*Source: Costar*

Legend: MSA · County · City · CA · T2

The Multifamily market is strong in the Tier 2 Study Area as demonstrated by lower vacancy rates and higher rents than the citywide averages. Vacancy in the study area has decreased significantly in the last few years as demand has increased for centralized and higher-quality housing in areas with high walkability. Most of the new multifamily supply has been delivered in the western portion of the Community Assessment Area in Central West End and Forest Park Southeast.
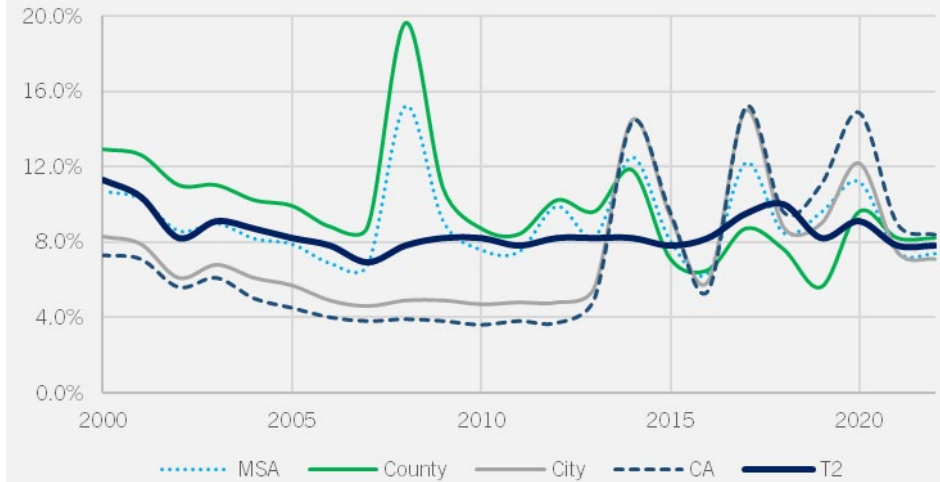
REGIONAL REAL ESTATE OVERVIEW
STUDENT HOUSING TRENDS

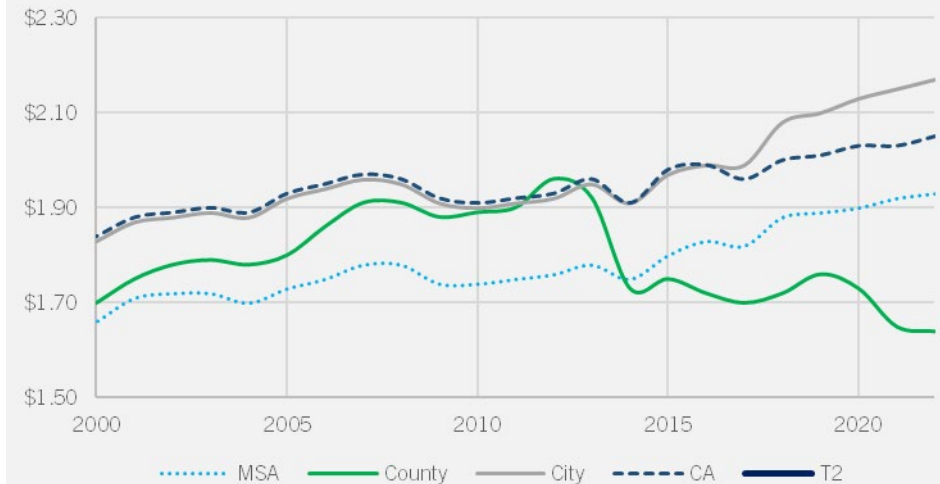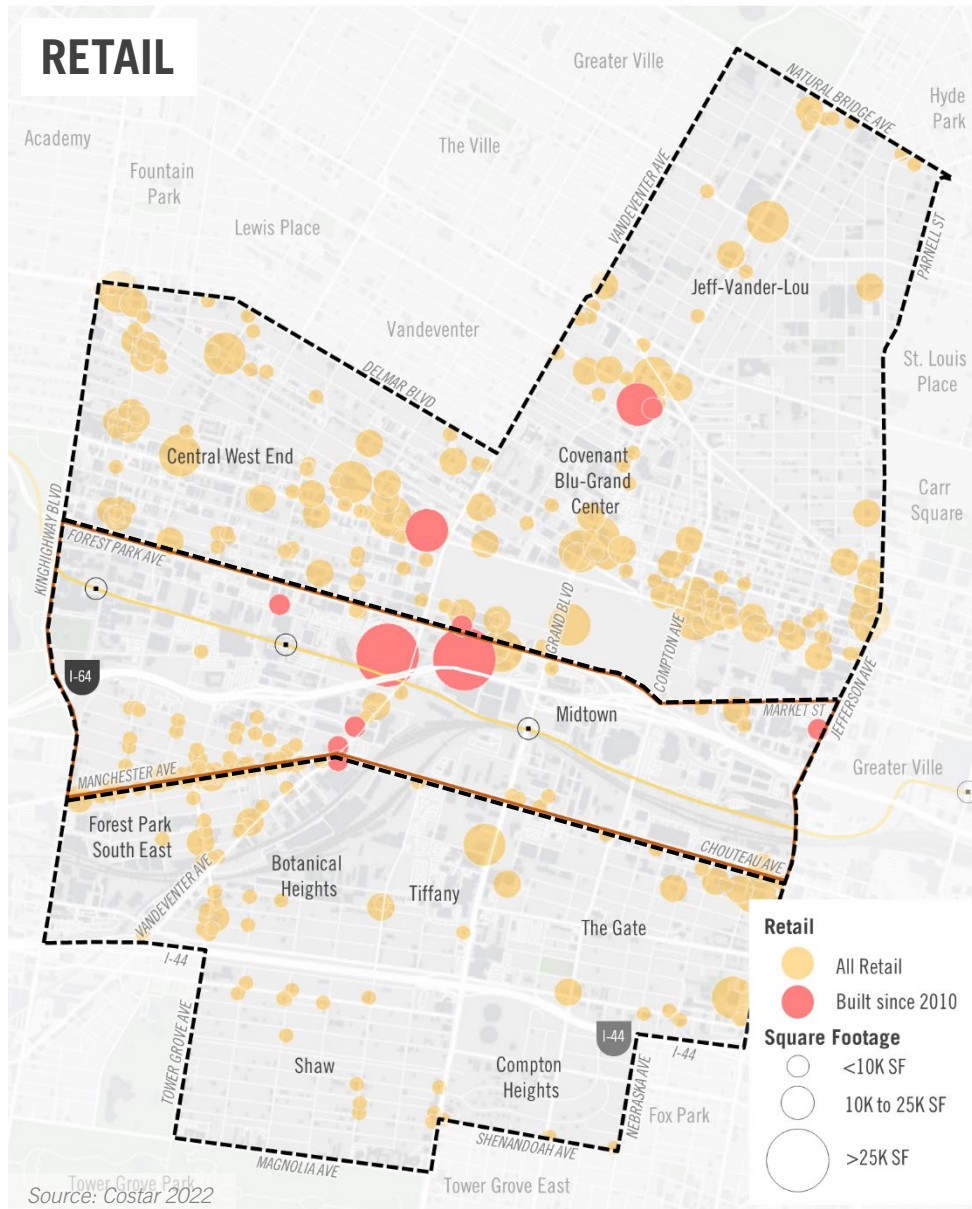Source: Costar 2022

Given the presence of St. Louis University, student housing development has been strong in and around the Tier 2 Study Area with four new properties delivered since 2010 and one property in the pipeline.

REGIONAL REAL ESTATE OVERVIEW
RETAIL TRENDS

RETAIL

Source: Costar 2022

Retail
- All Retail
- Built since 2010

Square Footage
- <10K SF
- 10K to 25K SF
- >25K SF

Vacancy Rate
Source: Costar

······ MSA —— County —— City ----- CA —— T2

Gross Rent PSF
Source: Costar
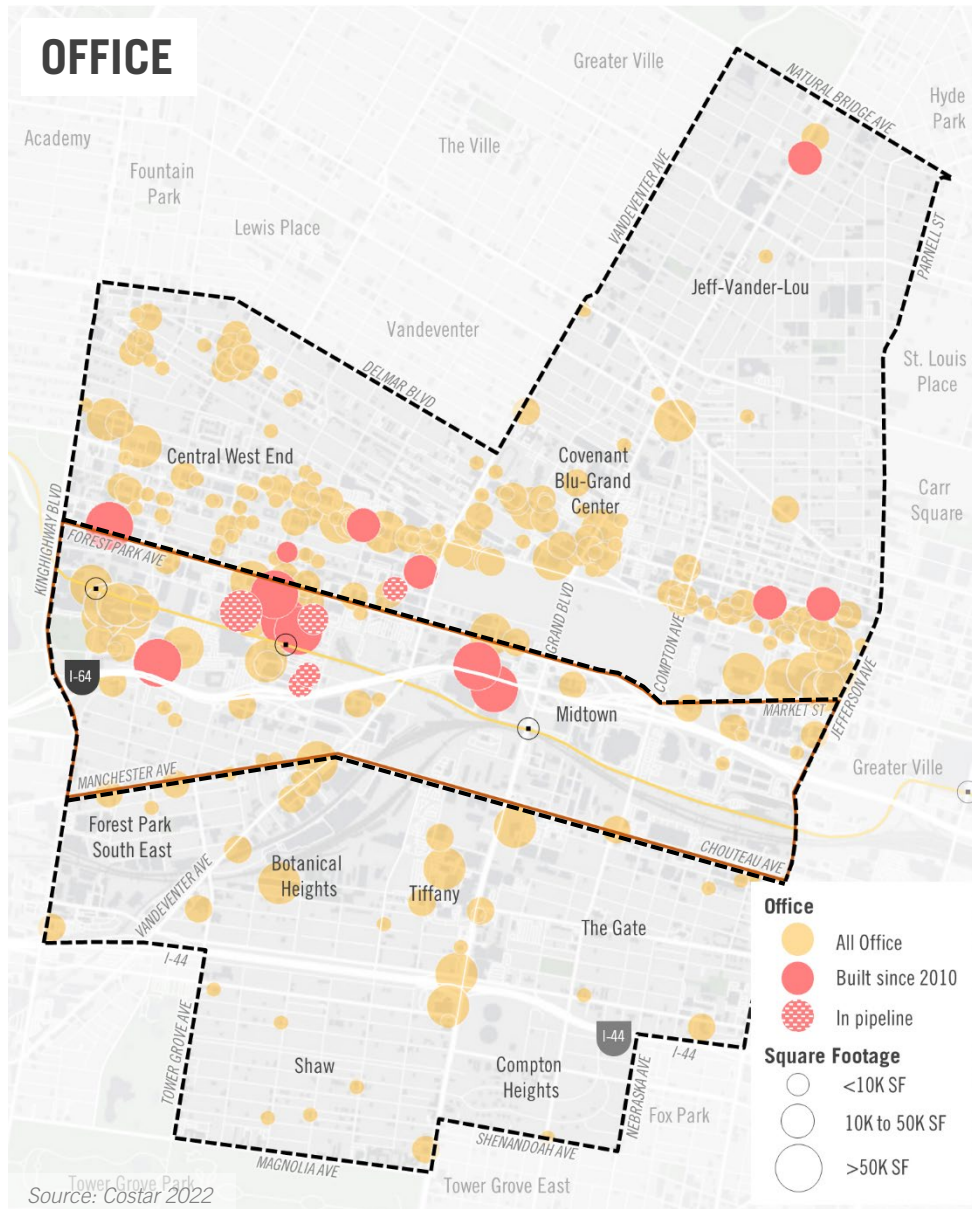
······ MSA —— County —— City ----- CA —— T2
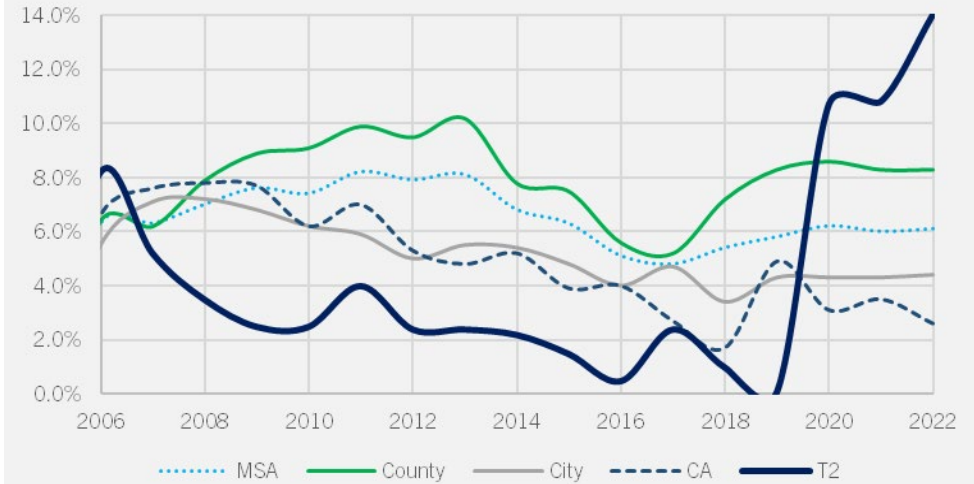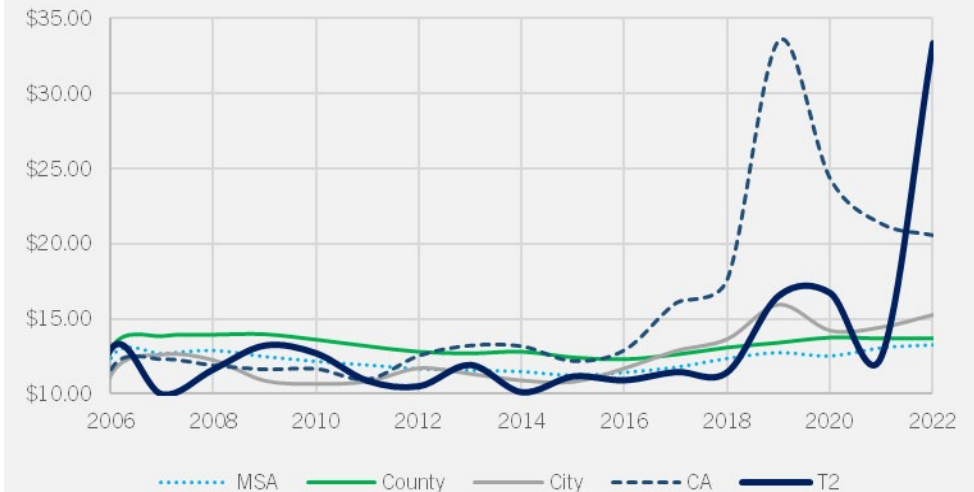
Retail vacancy increased significantly in the Tier 2 Study area given the recently delivered Foundry that has had slow absorption given the COVID-19 pandemic's impacts on the retail market. This development also impacted average gross rents with the property achieving some of the highest rents in the region.

REGIONAL REAL ESTATE OVERVIEW
OFFICE TRENDS

OFFICE

Source: Costar 2022

Office
- All Office
- Built since 2010
- In pipeline

Square Footage
- <10K SF
- 10K to 50K SF
- >50K SF

Vacancy Rate
Source: Costar

Legend: MSA · County · City · CA · T2

Gross Rent PSF
Source: Costar

Legend: MSA · County · City · CA · T2
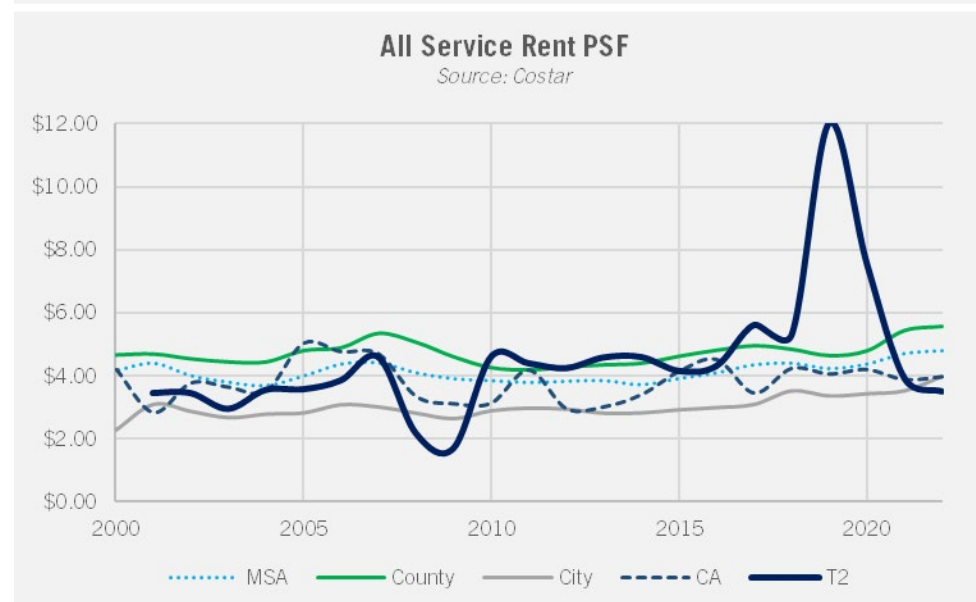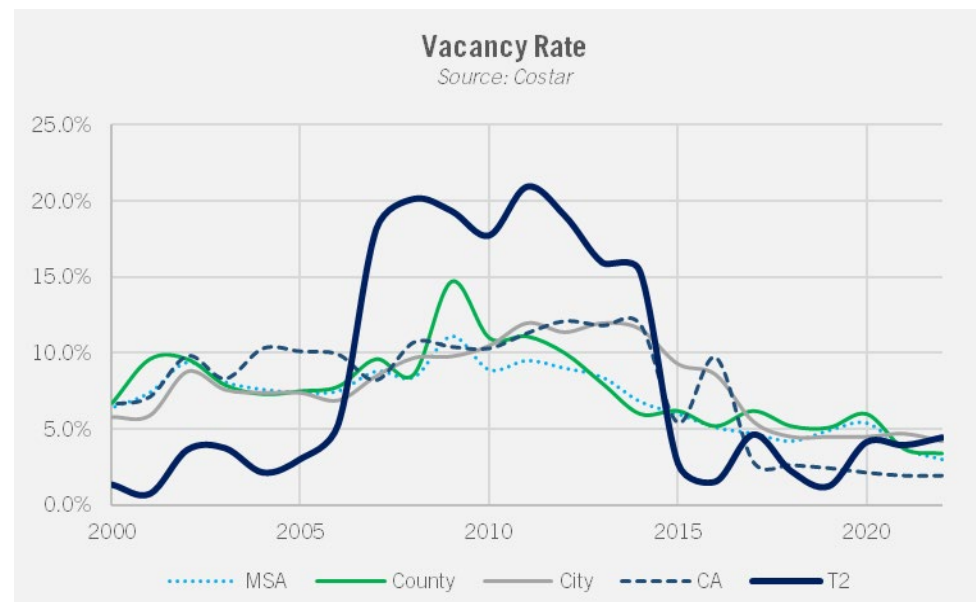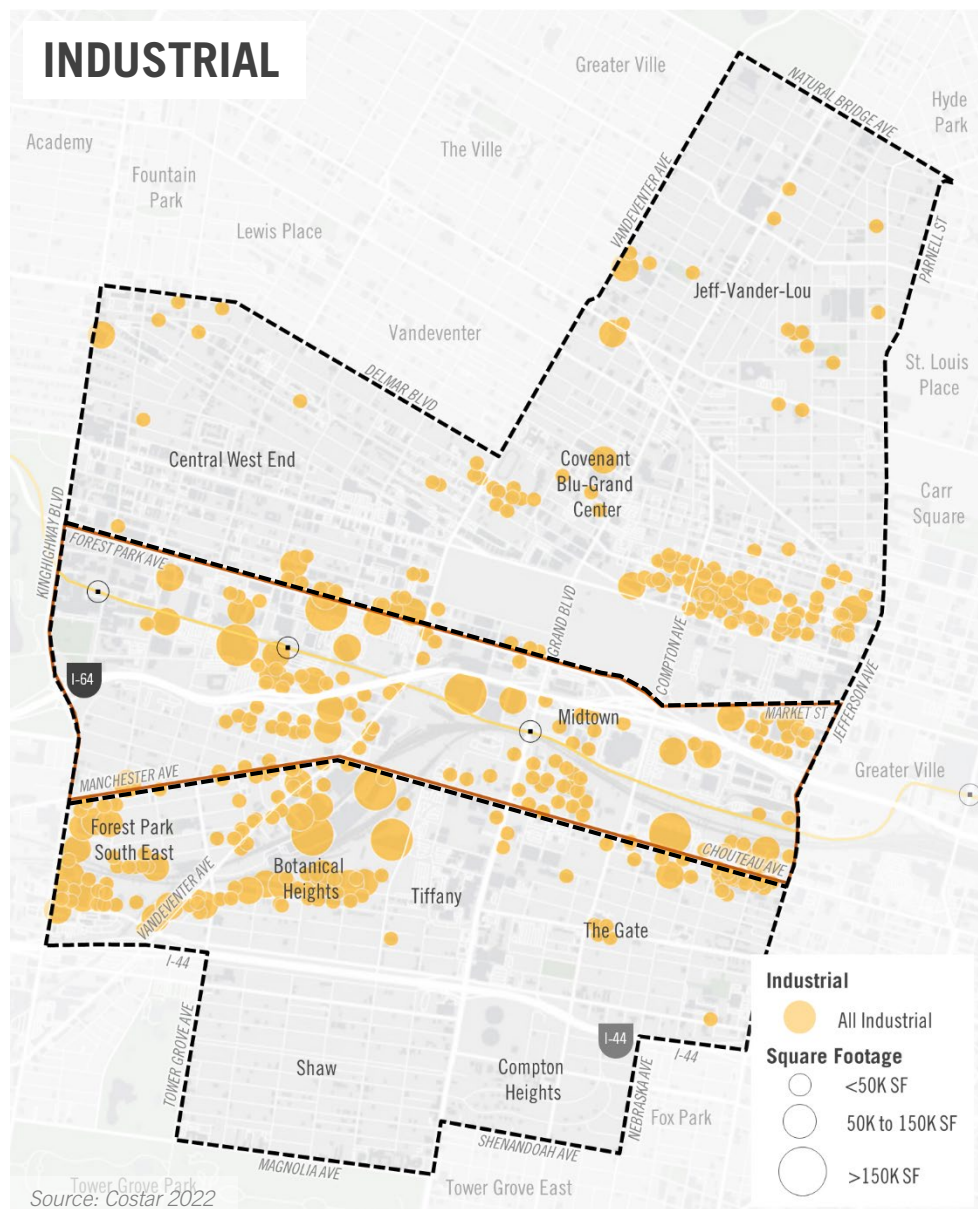
Since 2010, almost all of the city's office development activity has been in the Tier 2 Study Area with significant activity in CORTEX and Washington University Medical Campus. This new supply has led to an increase in average vacancy, but a significant increase in gross rents that are significantly above the regional average.

INDUSTRIAL

Source: Costar 2022

Vacancy Rate
Source: Costar

Legend: MSA · County · City · CA · T2

All Service Rent PSF
Source: Costar

Legend: MSA · County · City · CA · T2

Industrial
- All Industrial

Square Footage
- ○ <50K SF
- ○ 50K to 150K SF
- ○ >150K SF

While the study areas contain a large supply of industrial space, there has been no industrial development activity since 2010 and the newest supply in the region has been in lower density areas that are more supportive of the real estate specifications for transportation, warehousing, and logistics. Additionally, given the areas' high marketability for multi-family, hospitality, office, and retail uses, this has limited the market feasibility for industrial. Moving forward, the industrial supply will likely continue to shrink for adaptive reuse redevelopment opportunities.

HOSPITALITY
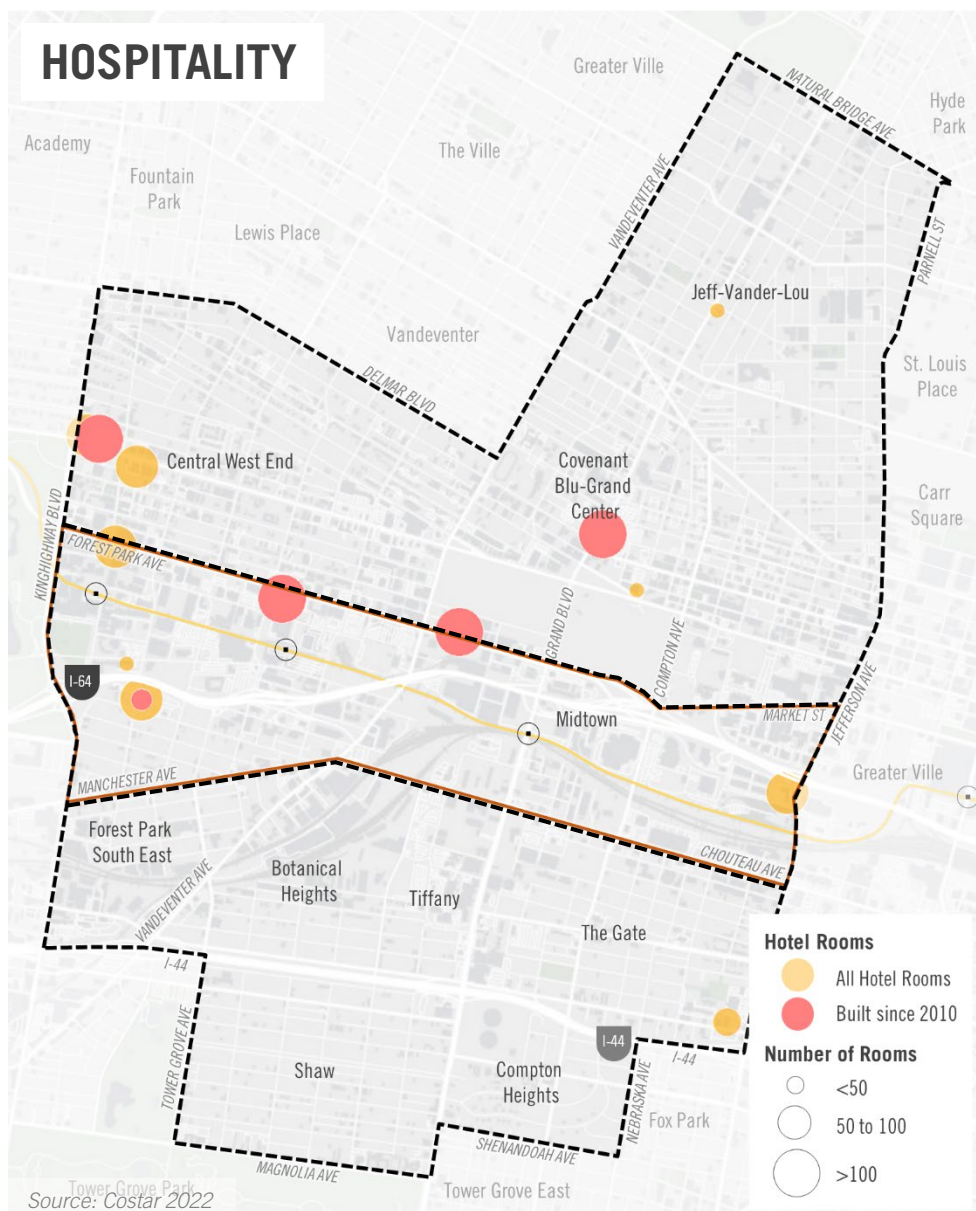
Source: Costar 2022

Average Daily Rate (ADR)
Source: Costar

Legend: MSA, County, City, CA, T2

Occupancy Rate
Source: Costar

Legend: MSA, County, City, CA, T2
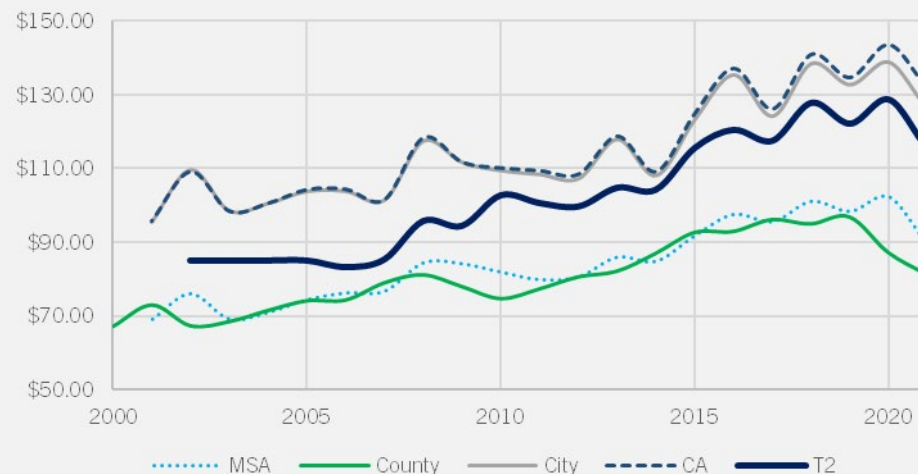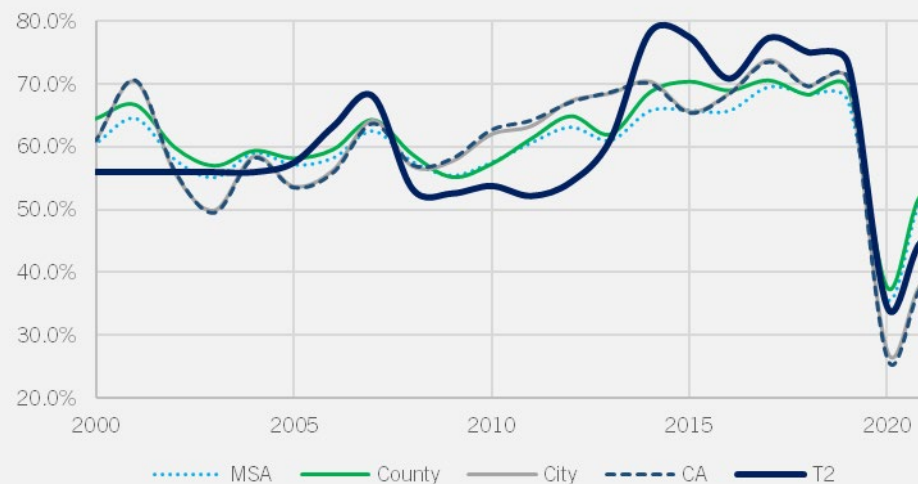
There have been several new hotels delivered (about 760 additional rooms) in the study areas since 2010, constituting around 64 percent of the city's new added rooms. Occupancy rate and average daily rate trends for the entire hotel supply have been generally consistent with the citywide average.

REGIONAL REAL ESTATE OVERVIEW
REAL ESTATE SWOT ANALYSIS

STRENGTHS

- Concentration of biotechnology-focused businesses will continue to attract new talent/businesses to the project area
- Proximity to major educational and research institutions will attract students/faculty to live
- Availability of light-rail public transportation allows workers and residents easier access to employment, entertainment, or residential amenities

WEAKNESSES

- A perception by developers that the City of St. Louis' shift in strategy to focus incentives elsewhere in the city may slow new development within the project area
- A negative perception of St. Louis as a place to live may dissuade individuals and families from relocating to the area

OPPORTUNITIES

- Ample developable sites remain within—and nearby—the project area
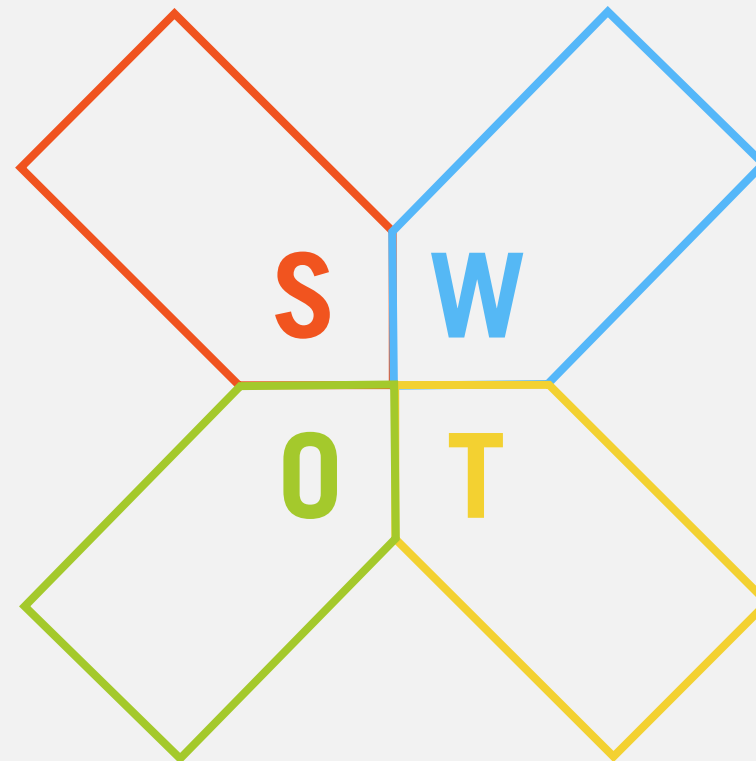- While national developers may be wary of investing in St. Louis, there Exists a local development community that has proven a commitment to investing in the City of St. Louis and rehabilitating formerly blighted and contaminated sites
- Pipeline of highly-educated graduates to be employed at or live near the project area

THREATS

- Continued investment in new development to the west of St. Louis threatens to move the 'center' of the region out of the City, stealing new businesses and residents
- Changes in working patterns—partly due to the recent pandemic—may somewhat reduce the need for dedicated office space or residential space adjacent to employment centers
- Increased competition from other cities (Kansas City, Chicago, Indianapolis, Nashville and beyond) may attract new businesses that would have otherwise chosen St. Louis
- Adjustments to economic incentive programs (TIF, CID, TDD, etc.) may reduce the amount of assistance available to developers, rendering future projects financially infeasible

S W O T

Community Assessment Framework

Introduction to Study Area

Market & Economy

People & Neighborhoods

Economic Development

ECONOMIC DEVELOPMENT
TAX INCREMENT FINANCING (TIF) AND TRANSPORTATION DEVELOPMENT (TDD) DISTRICTS

TIF DISTRICTS

Source: City of St. Louis

Active TIF Districts
☐ Active TIFs
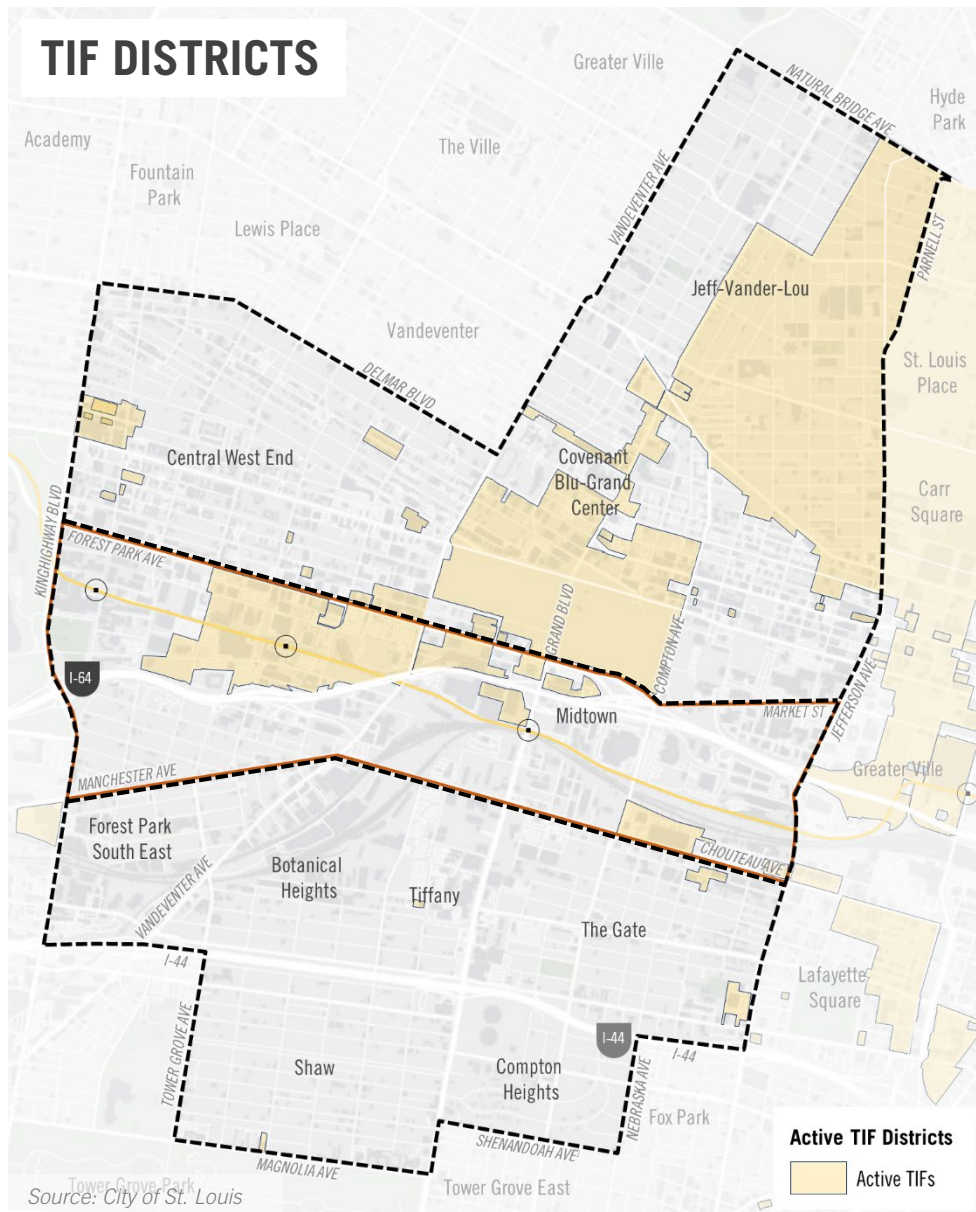
TIF has been utilized in large portions of the project area, most notably around Cortex and the Jeff-Vander-Lou areas. This has encouraged significant redevelopment to attract a wide range of users, and more growth is planned for the future, which will likely increase vehicular and pedestrian traffic.

TRANSPORTATION DEVELOPMENT DISTRICTS

Source: City of St. Louis

Active TDD Districts
☐ Active TDDs
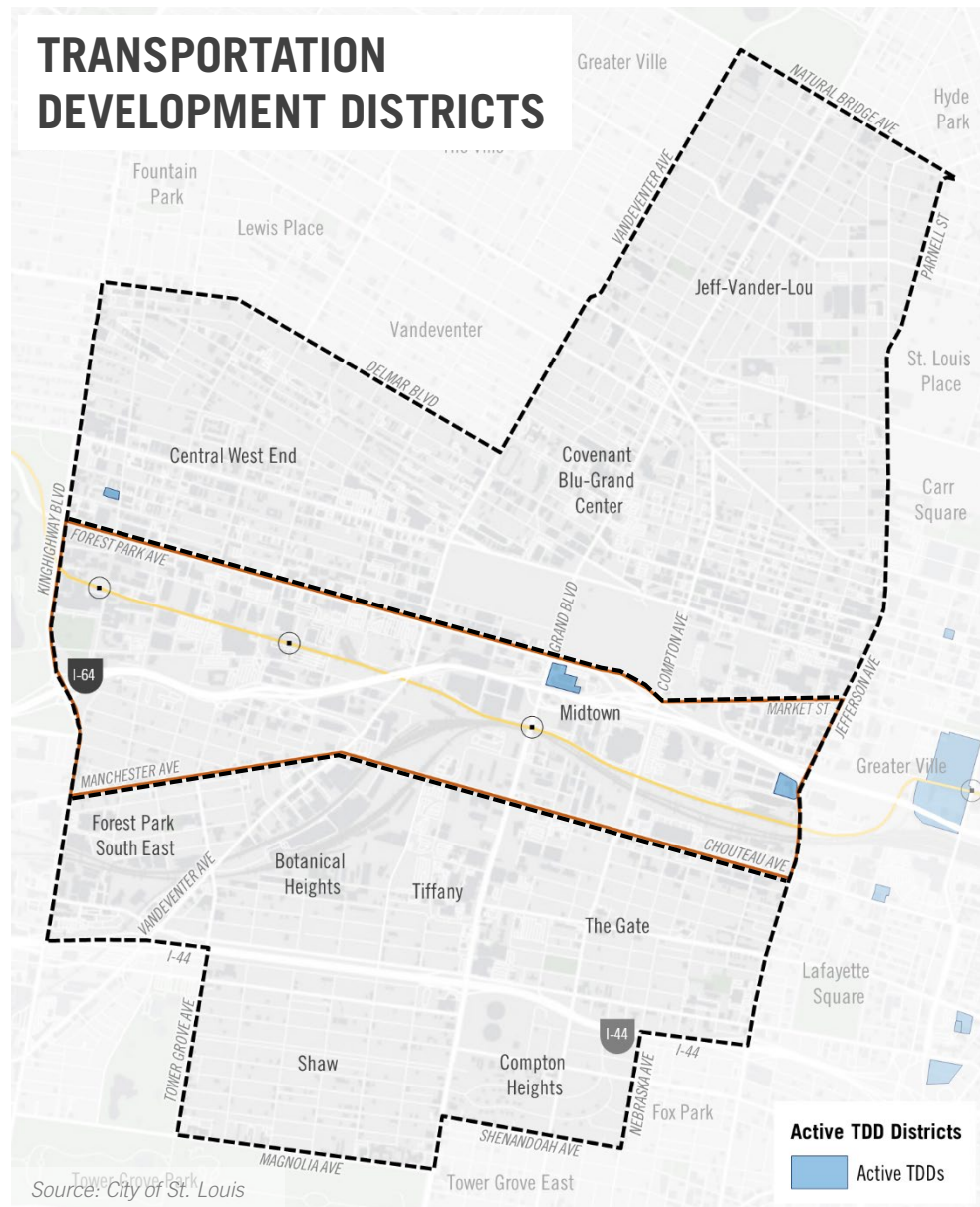
TDD has been used in a limited amount in the project area, but has served to provide funding for needed transportation-related upgrades to attract redevelopment. Additional use of TDD to provide a funding mechanism for additional redevelopment is likely in the future, and that new growth will likely cause an increase in vehicular and pedestrian traffic.

ECONOMIC DEVELOPMENT
COMMUNITY IMPROVEMENT (CID) DISTRICTS, TAX ABATED PARCELS AND CHAPTER 353 DISTRICTS

COMMUNITY IMPROVEMENT DISTRICTS

Source: City of St. Louis

Active CID Districts
Active CIDs
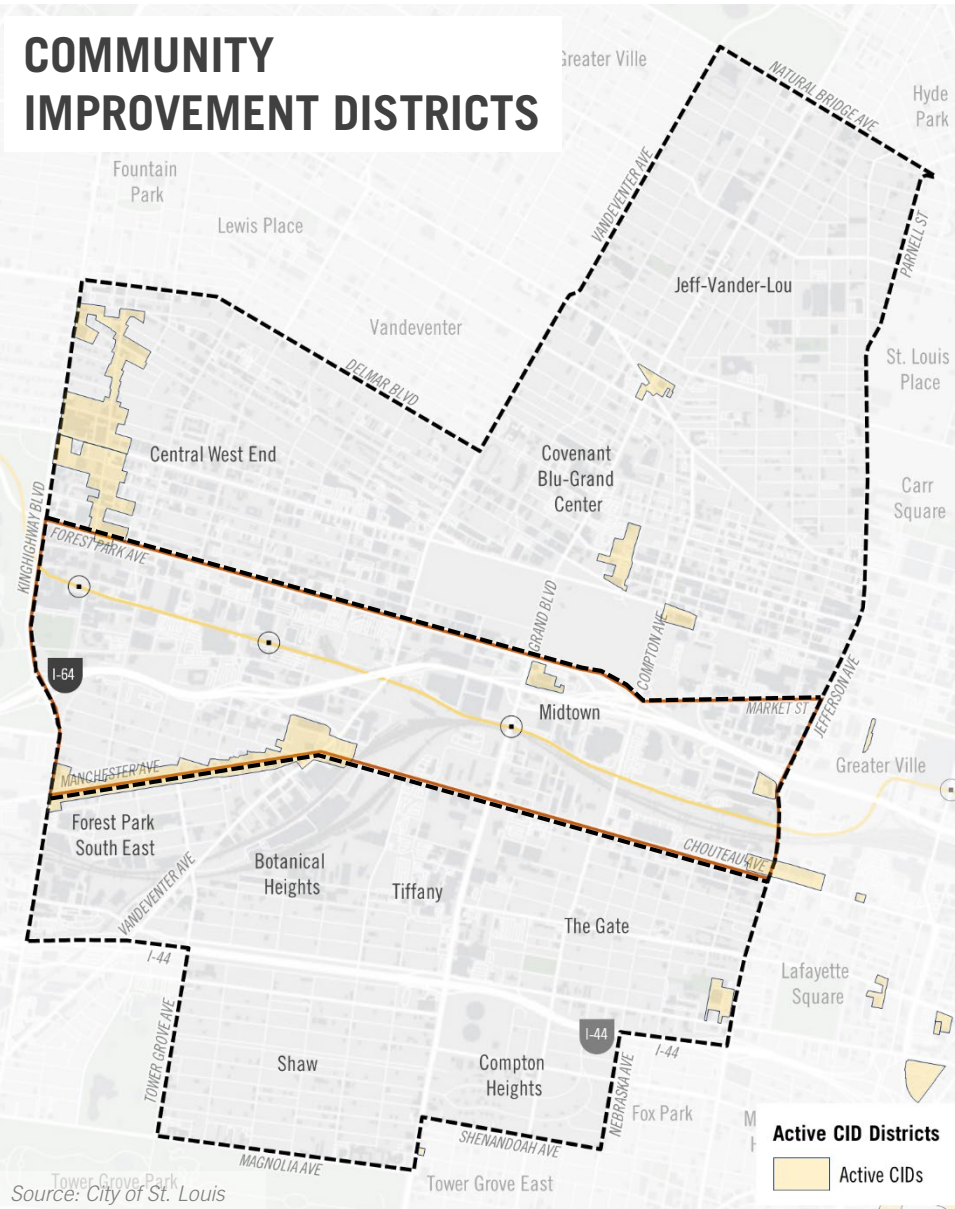
CID has been used in targeted locations to improve the physical characteristics of those areas in order to lure new residents, business, and in many cases grow those areas into retail and entertainment destinations. This has resulted in an increase in traffic in certain CID boundaries.

TAX ABATED PARCELS, CHAPTER 353

Source: City of St. Louis

Tax-Abated Parcels

Chapter 353 Boundaries
Chapter 353

1. Midtown 353 Redevelopment
2. St. Louis Innovation District 353
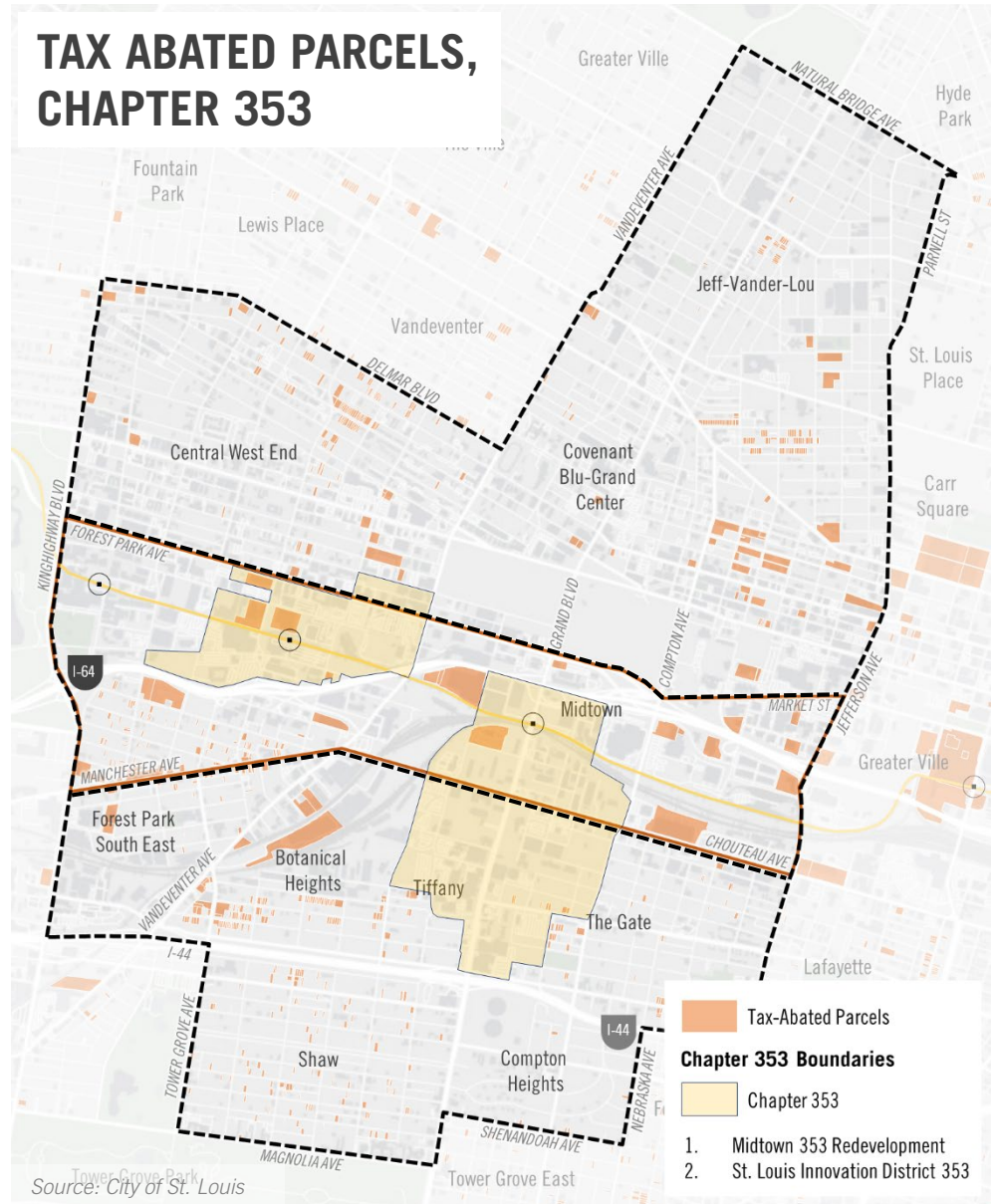
Tax abatement and Chapter 353 have been used throughout the area to encourage redevelopment, efficient use of existing building stock, and attract new residents and businesses to the area, thus increasing overall traffic in the area.

Community Assessment Framework

Introduction to Study Area

Market & Economy

People & Neighborhoods

PEOPLE & NEIGHBORHOODS
POPULATION DENSITY

KEY MAP

Community Assessment Boundary

Tier 2 Boundary

- —— MetroBus Route
- ⊙ MetroLink Station
- —— MetroLink Route

POPULATION DENSITY

Source: ESRI 2021

Population Per Sq. Mile
- < 3,000
- 3,000 to 10,000
- 10,000 to 15,000
- > 15,000
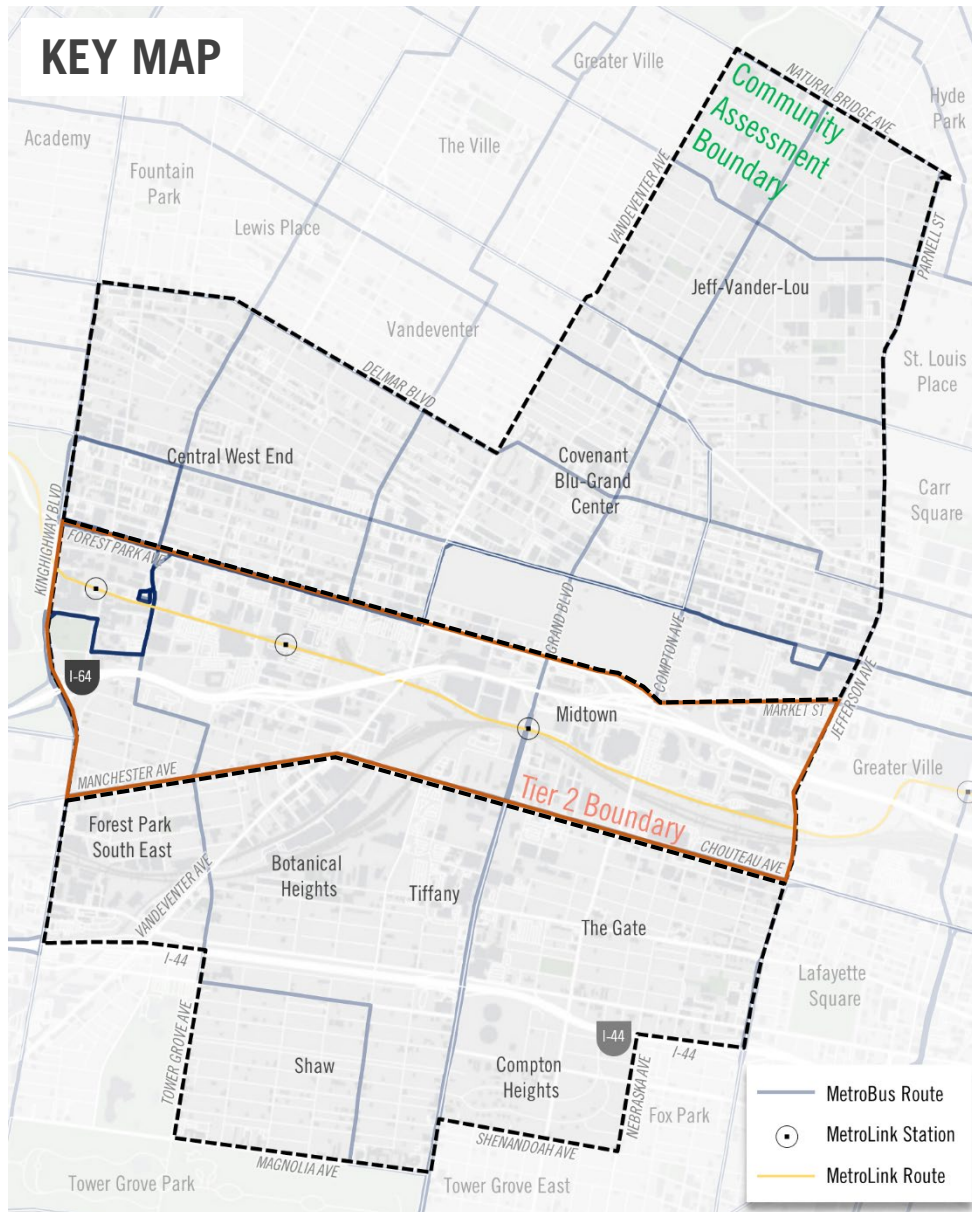
The Tier 2 Study Area is part if the City of St. Louis' Central Corridor bound by Kingshighway to the west, Manchester and Chouteau avenues to the south, Jefferson Avenue to the east, and Forest Park Avenue to the north.
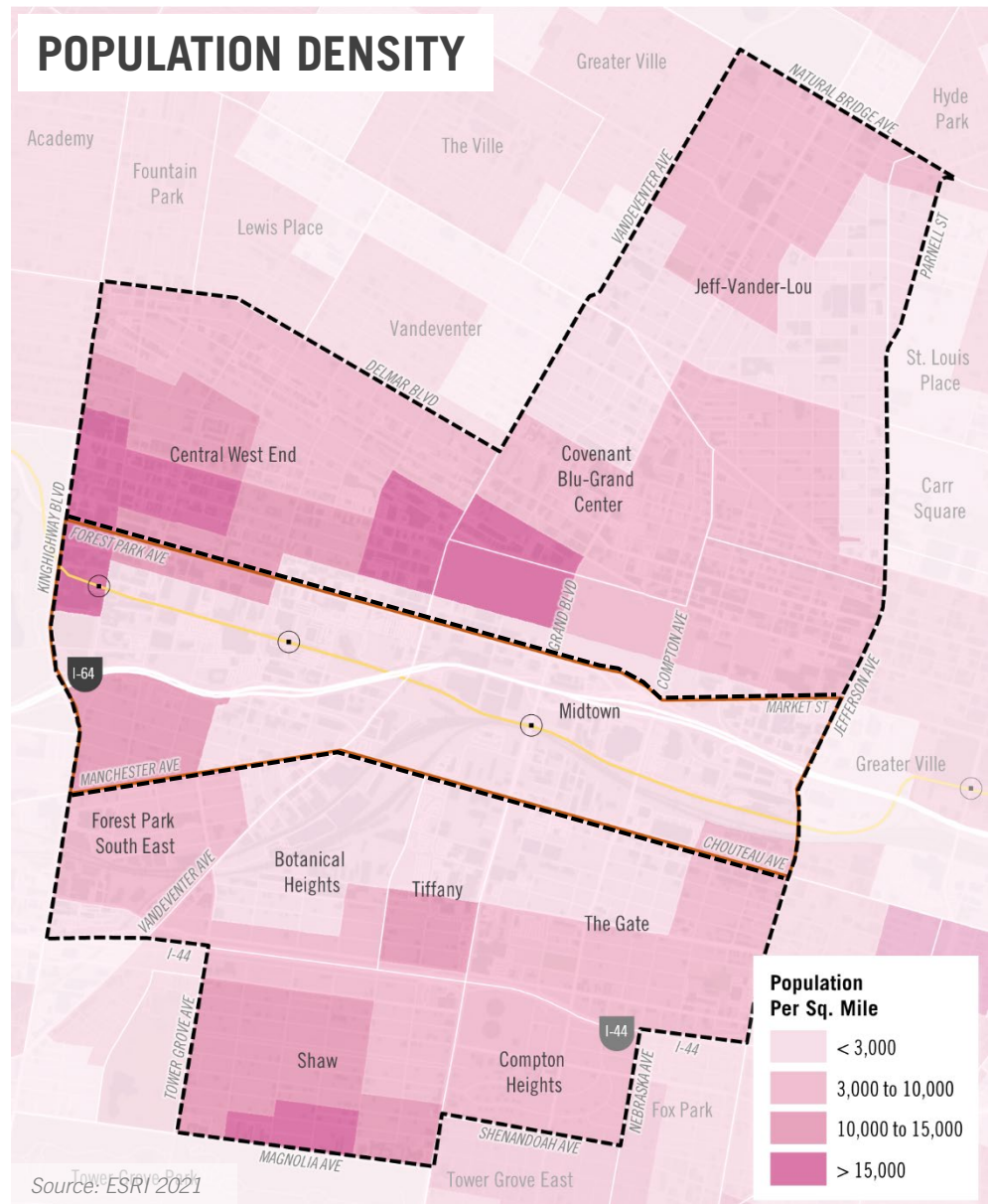
Population density is relatively high in the Central West End just north of the Tier 2 Study Area. The study area has a low population density since it is primarily commercial and industrial.

PEOPLE & NEIGHBORHOODS
UNEMPLOYMENT RATE & CRIME RATE

UNEMPLOYMENT RATE

Greater Ville

Hyde Park

Academy

The Ville

NATURAL BRIDGE AVE

Fountain Park

Lewis Place

VANDEVENTER AVE

Jeff-Vander-Lou

PARNELL ST

Vandeventer

DELMAR BLVD

St. Louis Place

Central West End

Covenant Blu-Grand Center

Carr Square

KINGHIGHWAY BLVD

FOREST PARK AVE

GRAND BLVD

COMPTON AVE

I-64

Midtown

MARKET ST

JEFFERSON AVE

MANCHESTER AVE

Greater Ville

Forest Park South East

VANDEVENTER AVE

Botanical Heights

Tiffany

The Gate

CHOUTEAU AVE

I-44

Lafayette

Unemployment Rate

	< 5%
	5% to 10%
	10% to 20%
	> 20%

Shaw

Compton Heights

TOWER GROVE AVE

NEBRASKA AVE

I-44

Fox Park

MAGNOLIA AVE

SHENANDOAH AVE

Tower Grove East

Source: ESRI 2021

Unemployment rates are relatively low in the and around the study area, but are significantly higher in and around Jeff-Vander-Lou neighborhood given weaker socio-economic conditions.

CRIME INDEX

Crime Index is a measure of relative risk in an area compared to the country (set at 100) as a whole. It is not a database of actual crimes. Updated semiannually, the index combines several sub-categories of both personal and property crimes.

Greater Ville

Hyde Park

Academy

The Ville

NATURAL BRIDGE AVE

VANDEVENTER AVE

Jeff-Vander-Lou

PARNELL ST

Vandeventer

DELMAR BLVD

St. Louis Place

Central West End

Covenant Blu-Grand Center

Carr Square

KINGHIGHWAY BLVD

FOREST PARK AVE

GRAND BLVD

COMPTON AVE

I-64

Midtown

MARKET ST

JEFFERSON AVE

MANCHESTER AVE

Greater Ville

Forest Park South East

VANDEVENTER AVE

Botanical Heights

Tiffany

The Gate

CHOUTEAU AVE

I-44

Shaw

Compton Heights

TOWER GROVE AVE

NEBRASKA AVE

I-44

Fox Park

MAGNOLIA AVE

SHENANDOAH AVE

Tower Grove East

Total Crime Index
City of St. Louis: 285

	< 100
	100 to 250
	250 to 400
	> 400

Source: ESRI 2021

Crime Index scores are relatively high in the neighborhoods immediately south of the study area and further north in Jeff-Vander-Lou. This can be attributed to socio-economic conditions and larger concentrations of commercial properties.

Community Assessment Framework

Introduction to Study Area

Market & Economy

People & Neighborhoods

Demographics: People & Households

DEMOGRAPHICS: PEOPLE & HOUSEHOLDS
POPULATION AND HOUSEHOLD COMPOSITION: STUDY AREAS

POPULATION AND HOUSEHOLD COMPOSITION

Description	Tier 2 Boundary	Community Assessment Boundary	St. Louis City, MO	St. Louis MSA	Missouri	USA
Population						
2026 Projection	4,874	42,659	303,000	2,878,100	6,382,800	345,887,500
2021 Estimate	4,279	42,115	309,000	2,843,300	6,250,000	333,934,100
2010 Census	3,605	40,762	319,200	2,787,700	5,988,900	308,745,500
2000 Census	3,438	42,849	348,000	2,675,000	5,595,000	281,422,000
Annual Change 2021-2026	2.6%	0.3%	-0.4%	0.2%	0.4%	0.7%
Total Change 2000-2010	4.9%	-4.9%	-8.3%	4.2%	7.0%	9.7%
Annual Change 2010-2021	1.5%	0.3%	-0.3%	0.2%	0.4%	0.7%
Total Change (2010-2021)	18.7%	3.3%	-3.2%	2.0%	4.4%	8.2%
Net Change (2010-2021)	674	1,353	-10,200	55,600	261,100	25,188,600
Households						
2021 Estimate	1,862	19,647	140,064	1,142,310	2,497,270	126,470,675
2010 Census	1,462	18,652	142,024	1,109,665	2,375,611	116,716,292
2000 Census	1,696	18,529	147,042	1,039,873	2,194,594	105,480,101
Annual Growth 2021-2026	3.4%	0.5%	-0.3%	0.3%	0.5%	0.7%
Annual Growth 2010-2021	2.2%	0.5%	-0.1%	0.3%	0.4%	0.7%
Households by Size (2015 - 2019)						
One-Person	58%	55%	45%	30%	29%	28%
Two-Person	32%	29%	31%	34%	36%	34%
Three-Person	4%	8%	11%	15%	15%	16%
Four-Person	6%	5%	7%	12%	12%	13%
Five-Person	0%	2%	3%	5%	5%	6%
Six-Person	0%	1%	1%	2%	2%	2%
Seven-Person +	0%	1%	1%	1%	1%	1%
Average Household Size						
2026 Projection	1.82	1.89	2.11	2.44	2.43	2.58
2021 Estimate	1.84	1.90	2.12	2.44	2.43	2.58
2010 Census	1.85	1.92	2.16	2.46	2.45	2.58

© ESRI, 2021

Because of the influx of new investment in the study area over the last 10 years, the total population growth rate of 18.7 percent has far exceeded the regional average. Average household sizes are lower than the regional average given the concentration of students, singles, couples, and smaller professional households, many without children.

DEMOGRAPHICS: PEOPLE & HOUSEHOLDS
POPULATION AND HOUSEHOLD COMPOSITION: NEIGHBORHOODS

POPULATION AND HOUSEHOLD COMPOSITION

Description	Central West End	Forest Park SE	Midtown	Covenant Blu-Grand Center	Jeff-Vander-Lou	St. Louis City, MO
Population						
2026 Projection	14,582	4,179	6,343	3,600	5,100	303,000
2021 Estimate	13,996	3,863	5,839	3,500	5,300	309,000
2010 Census	12,883	2,918	5,652	3,600	5,700	319,200
2000 Census	12,548	3,468	4,041	4,000	6,000	348,000
Annual Change 2021-2026	0.8%	1.6%	1.7%	0.6%	-0.8%	-0.4%
Total Change 2000-2010	2.7%	-15.9%	39.9%	-10.0%	-5.0%	-8.3%
Annual Change 2010-2021	0.7%	2.5%	0.3%	-0.1%	-0.6%	-0.3%
Total Change (2010-2021)	8.6%	32.4%	3.3%	-2.8%	-7.0%	-3.2%
Net Change (2010-2021)	1,113	945	187	-100	-400	-10,200
Households						
2021 Estimate	8,594	1,831	1,382	1,452	2,139	140,064
2010 Census	7,900	1,342	1,187	1,499	2,265	142,024
2000 Census	7,728	1,323	1,267	1,411	2,478	147,042
Annual Growth 2021-2026	1.0%	2.2%	3.4%	0.5%	-0.7%	-0.3%
Annual Growth 2010-2021	0.8%	2.8%	1.4%	-0.3%	-0.5%	-0.1%
Households by Size (2015 - 2019)						
One-Person	63%	48%	76%	56%	55%	45%
Two-Person	28%	38%	17%	26%	17%	31%
Three-Person	6%	6%	2%	9%	10%	11%
Four-Person	2%	8%	3%	6%	8%	7%
Five-Person	1%	0%	0%	1%	6%	3%
Six-Person	0%	0%	0%	0%	1%	1%
Seven-Person +	0%	0%	1%	2%	3%	1%
Average Household Size						
2026 Projection	1.44	1.92	2.39	1.95	2.38	2.11
2021 Estimate	1.44	1.96	2.46	1.98	2.39	2.12
2010 Census	1.43	2.01	2.52	1.92	2.41	2.16

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Forest Park Southeast's population grew by more than 32 percent from 2010 to 2021, one of the fastest growing neighborhoods in the region. Central West End has also experienced strong growth, while Grand Center experienced a slight population decline given the lack of investment and development activity.

DEMOGRAPHICS: PEOPLE & HOUSEHOLDS
POPULATION AND HOUSEHOLD COMPOSITION: NEIGHBORHOODS

POPULATION AND HOUSEHOLD COMPOSITION

Description	Botanical Heights	Tiffany	The Gate	Shaw	Compton Heights	St. Louis City, MO
Population						
2026 Projection	1,120	1,085	3,218	6,900	1,500	303,000
2021 Estimate	1,118	1,096	3,276	7,000	1,400	309,000
2010 Census	1,037	1,060	3,456	6,800	1,300	319,200
2000 Census	1,598	1,300	3,498	8,000	1,000	348,000
Annual Change 2021-2026	0.0%	-0.2%	-0.4%	-0.3%	1.4%	-0.4%
Total Change 2000-2010	-35.1%	-18.5%	-1.2%	-15.0%	30.0%	-8.3%
Annual Change 2010-2021	0.7%	0.3%	-0.5%	0.2%	0.6%	-0.3%
Total Change (2010-2021)	7.8%	3.4%	-5.2%	2.9%	7.7%	-3.2%
Net Change (2010-2021)	81	36	-180	200	100	-10,200
Households						
2021 Estimate	422	472	1,479	3,062	676	140,064
2010 Census	383	449	1,532	2,939	618	142,024
2000 Census	471	495	1,340	3,156	554	147,042
Annual Growth 2021-2026	0.1%	-0.2%	-0.3%	-0.2%	0.8%	-0.3%
Annual Growth 2010-2021	0.9%	0.5%	-0.3%	0.4%	0.8%	-0.1%
Households by Size (2015 - 2019)						
One-Person	49%	17%	44%	43%	38%	45%
Two-Person	34%	49%	30%	34%	46%	31%
Three-Person	3%	12%	16%	8%	7%	11%
Four-Person	10%	9%	7%	7%	9%	7%
Five-Person	2%	5%	0%	6%	0%	3%
Six-Person	2%	8%	3%	1%	1%	1%
Seven-Person +	0%	0%	0%	0%	0%	1%
Average Household Size						
2026 Projection	2.64	2.31	2.12	2.18	2.04	2.11
2021 Estimate	2.65	2.31	2.13	2.19	2.04	2.12
2010 Census	2.71	2.35	2.17	2.23	2.08	2.16

© ESRI, 2021

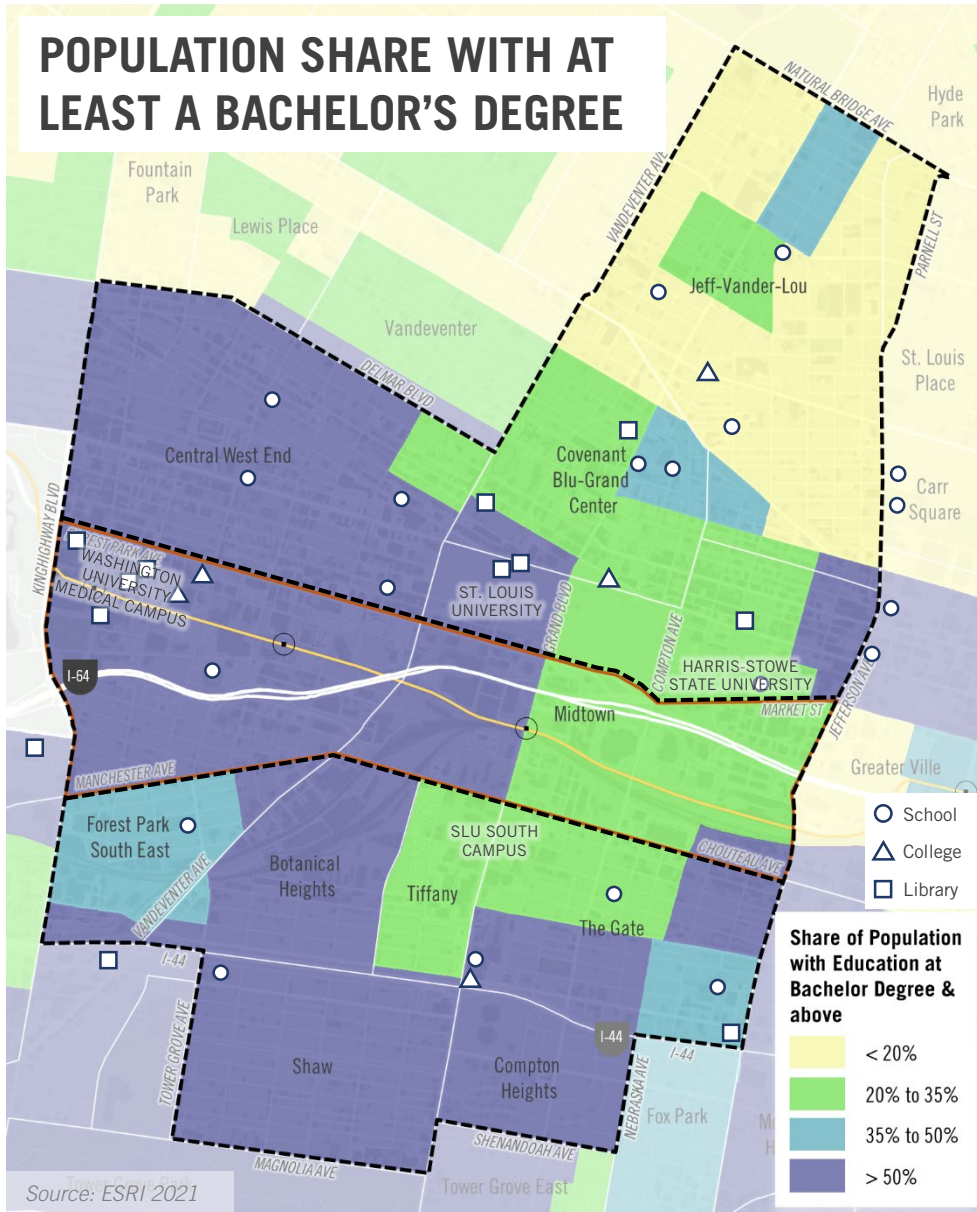Population growth in the areas south of I-64 has been slower than the areas to the north for a variety of reasons, including: lack of readily developable parcels, overall marketability of existing units, and overall lower density of residential development. Household sizes in these neighborhoods are more consistent with the regional average given the single-family housing stock and larger unit sizes.
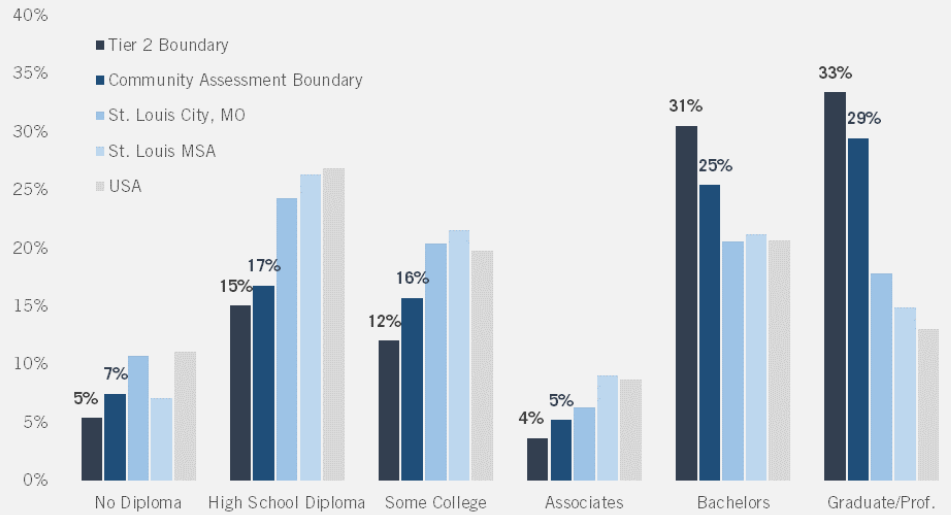
POPULATION SHARE WITH AT LEAST A BACHELOR'S DEGREE

Source: ESRI 2021

Share of Population with Education at Bachelor Degree & above
- < 20%
- 20% to 35%
- 35% to 50%
- > 50%

○ School
△ College
□ Library

Educational Attainment of Residents, 2021
Source: ESRI

Legend:
- Tier 2 Boundary
- Community Assessment Boundary
- St. Louis City, MO
- St. Louis MSA
- USA

	No Diploma	High School Diploma	Some College	Associates	Bachelors	Graduate/Prof.
Tier 2 Boundary	5%	15%	12%	4%	31%	33%
Community Assessment Boundary	7%	17%	16%	5%	25%	29%

Educational Attainment for Jobs in Study Area, 2019
Source: US Census Bureau (OntheMap), LEHD Origin-Destination Employment Statistics (2002-2019)

Legend:
- Tier 2 Boundary
- Community Assessment Boundary
- St. Louis City, MO
- St. Louis MSA

	No Diploma	High School Diploma	Some College	Bachelors & Advanced
Tier 2 Boundary	8%	19%	24%	26%
Community Assessment Boundary	9%	20%	26%	28%
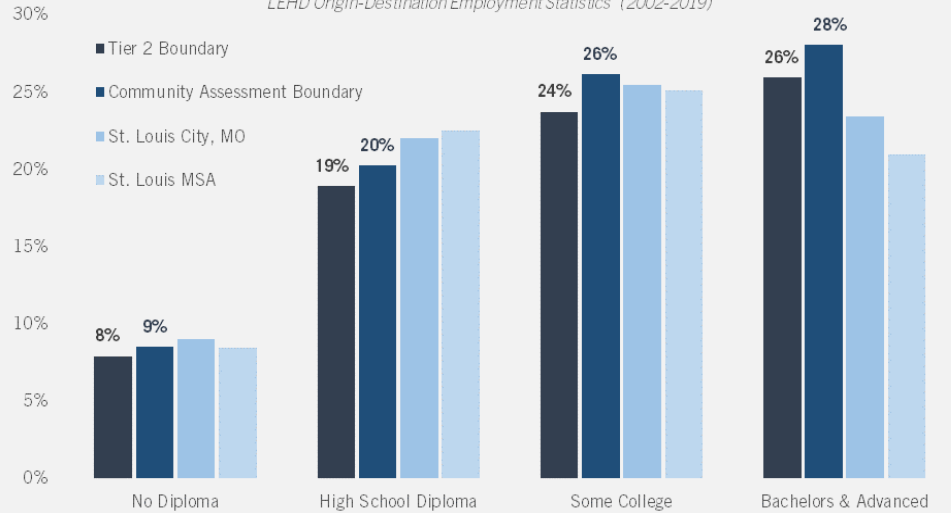
The western portions of the study area, including the neighborhoods to the north and south have higher concentrations of highly-educated individuals. The areas to the east have lower levels of educational attainment, but are consistent with the regional average.

DEMOGRAPHICS: PEOPLE & HOUSEHOLDS
AGE OF RESIDENTS

MEDIAN AGE

Median Age
- < 30 yrs.
- 30 to 40 yrs.
- 40 to 50 yrs.
- > 50 yrs.

Source: ESRI 2021

Population Distribution by Age, 2021
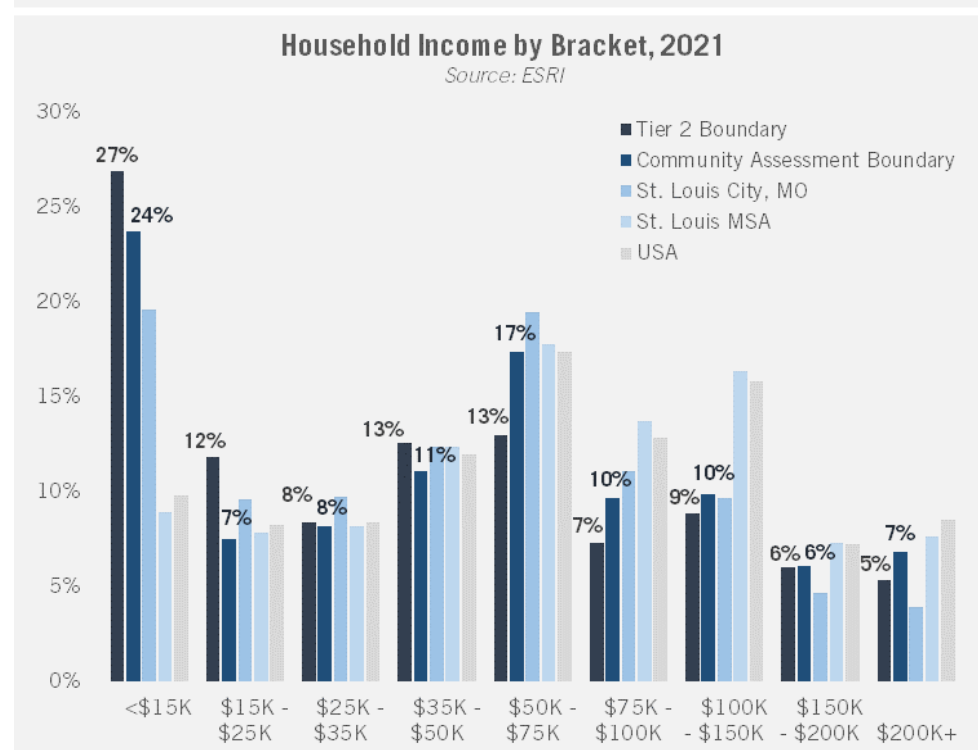*Source: ESRI*

Legend:
- Tier 2 Boundary
- Community Assessment Boundary
- St. Louis City, MO
- St. Louis MSA

Change in Population by Age, 2010-2021
Source: ESRI

Legend:
- Tier 2 Boundary
- Community Assessment Boundary
- St. Louis City, MO
- St. Louis MSA
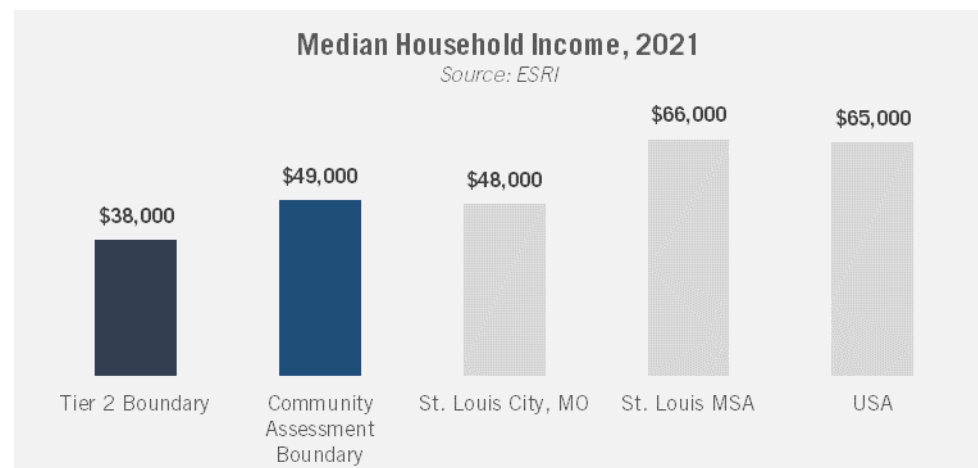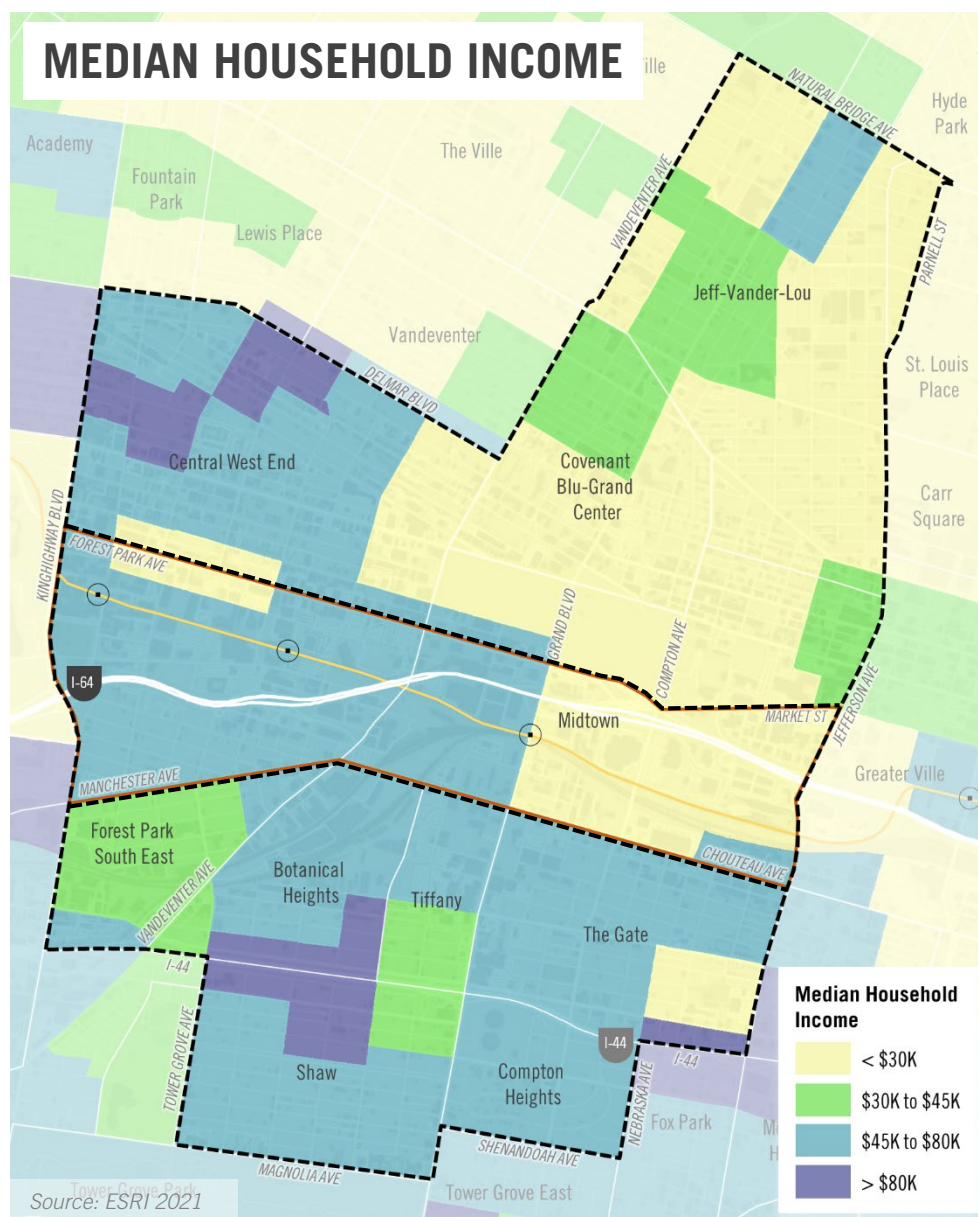- USA
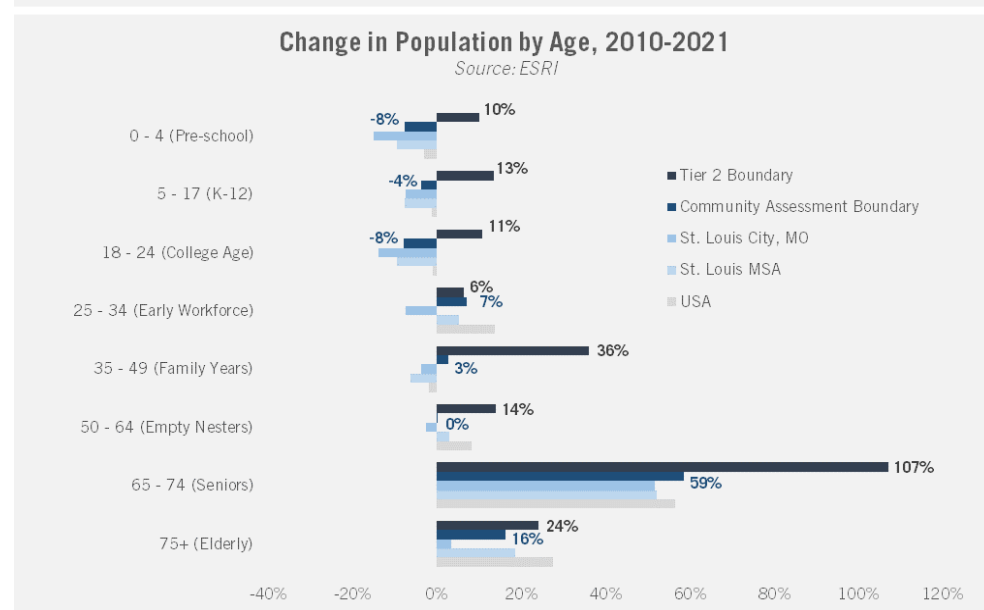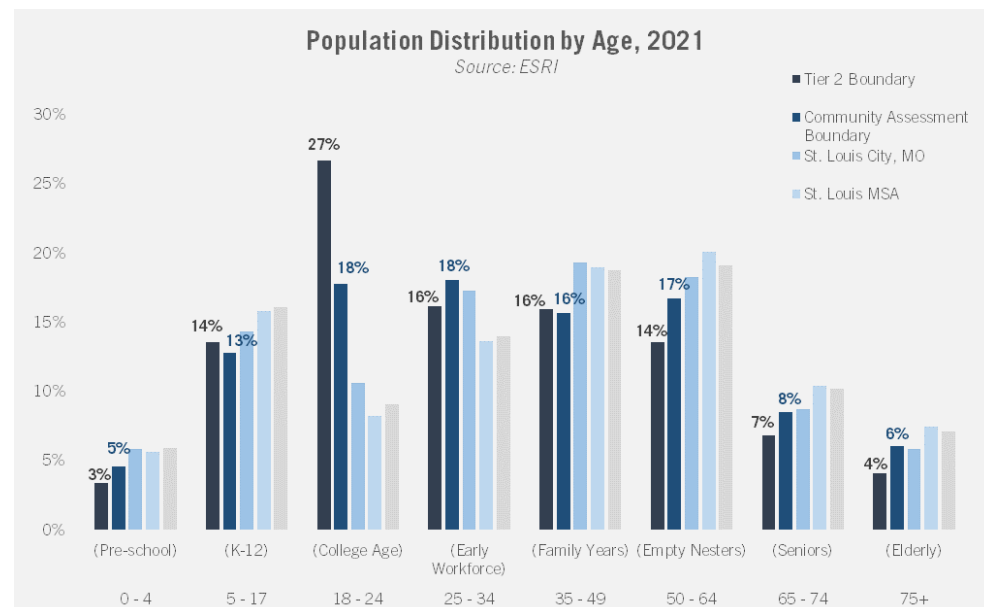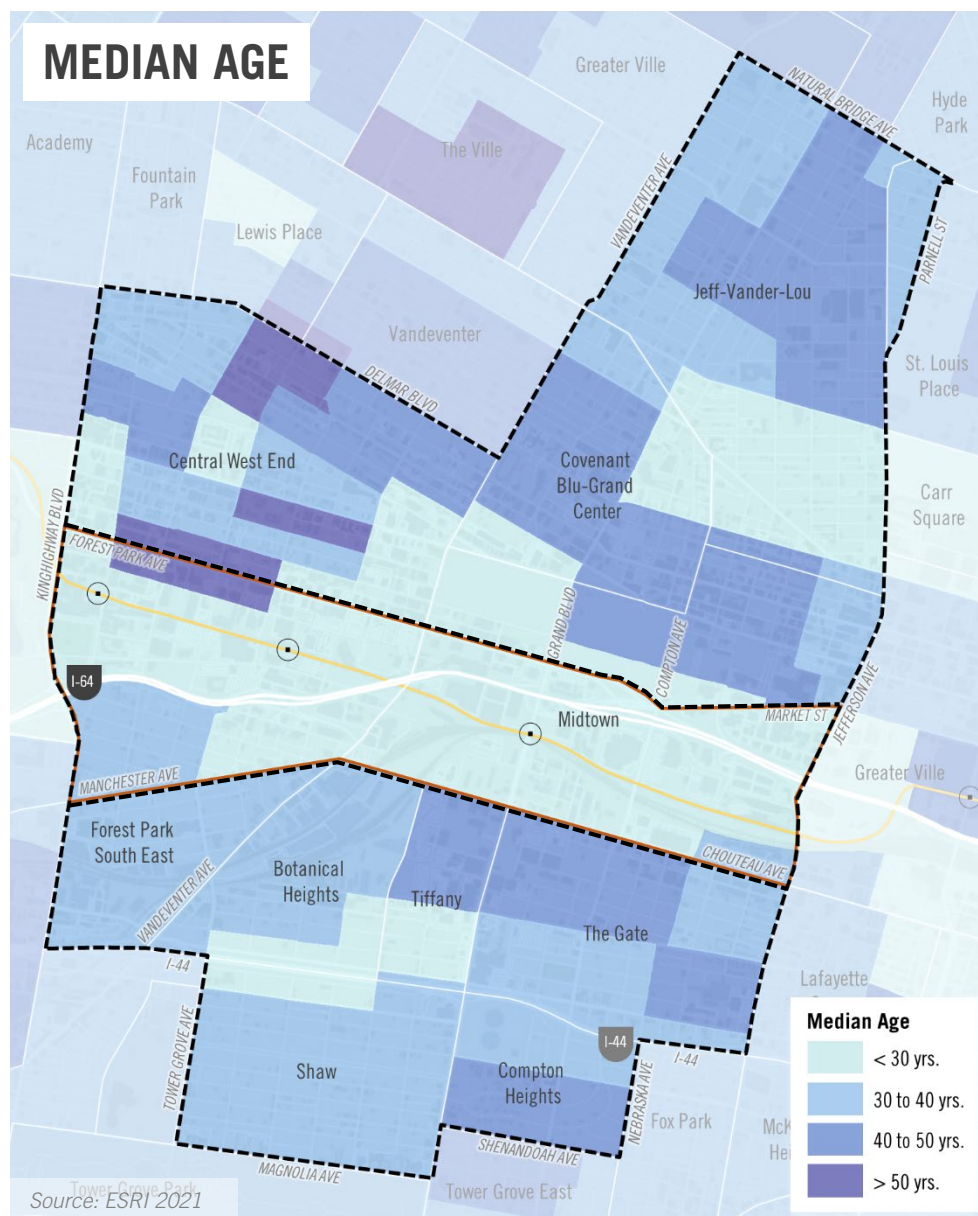
The Community Assessment Boundary has a relatively large college aged population (27 percent) given the presence of St. Louis University. Between 2010 and 2021, the Tier 2 Study Area had a large increase in its 65 and older population. The increase in younger households can be attributed to continued reinvestment in Forest Park South East and Central West End.

MEDIAN HOUSEHOLD INCOME

Median Household Income
- < $30K
- $30K to $45K
- $45K to $80K
- > $80K

Source: ESRI 2021

Median Household Income, 2021
Source: ESRI

	Amount
Tier 2 Boundary	$38,000
Community Assessment Boundary	$49,000
St. Louis City, MO	$48,000
St. Louis MSA	$66,000
USA	$65,000

Household Income by Bracket, 2021
Source: ESRI

Legend:
- Tier 2 Boundary
- Community Assessment Boundary
- St. Louis City, MO
- St. Louis MSA
- USA
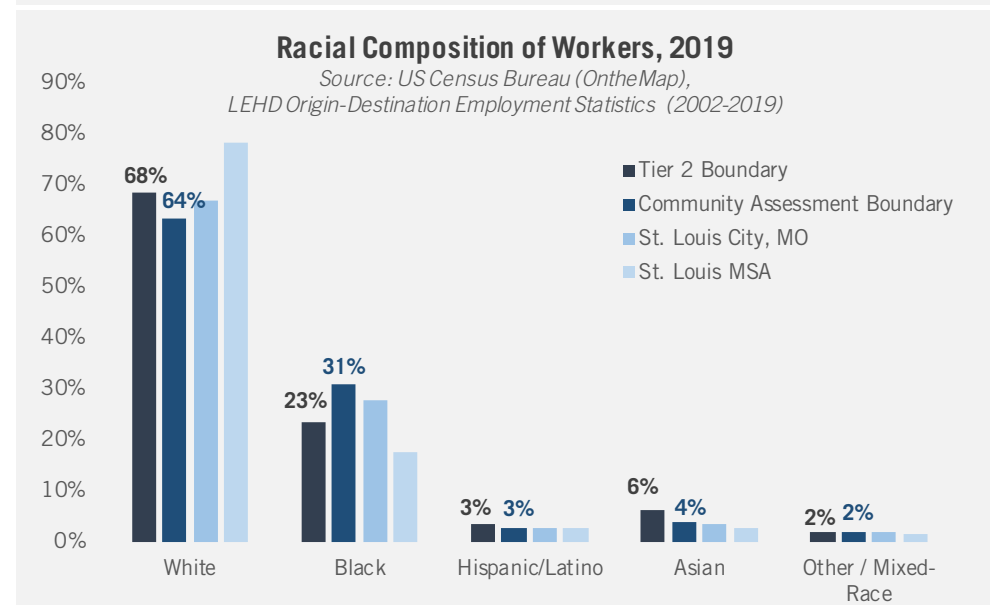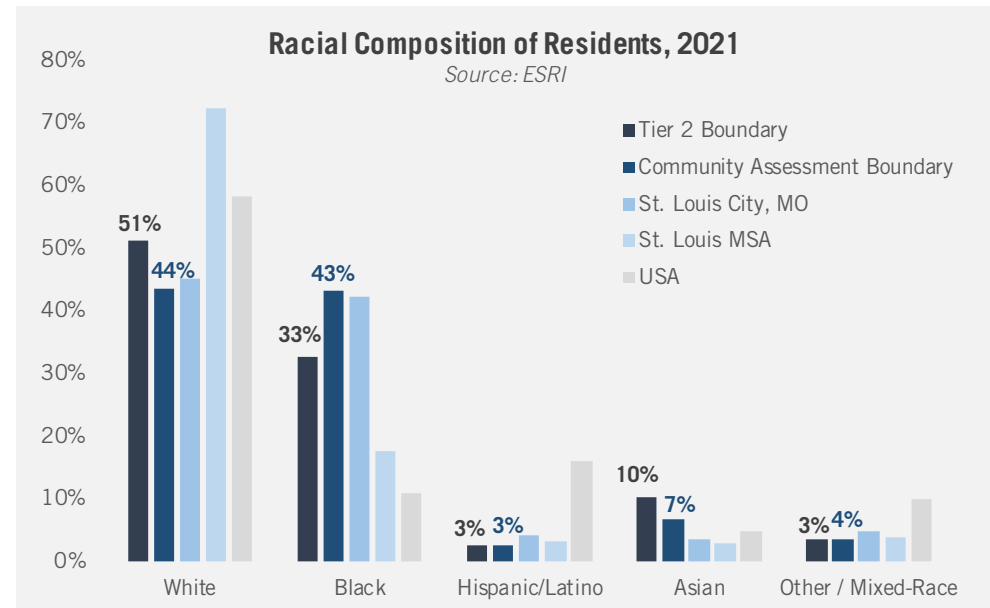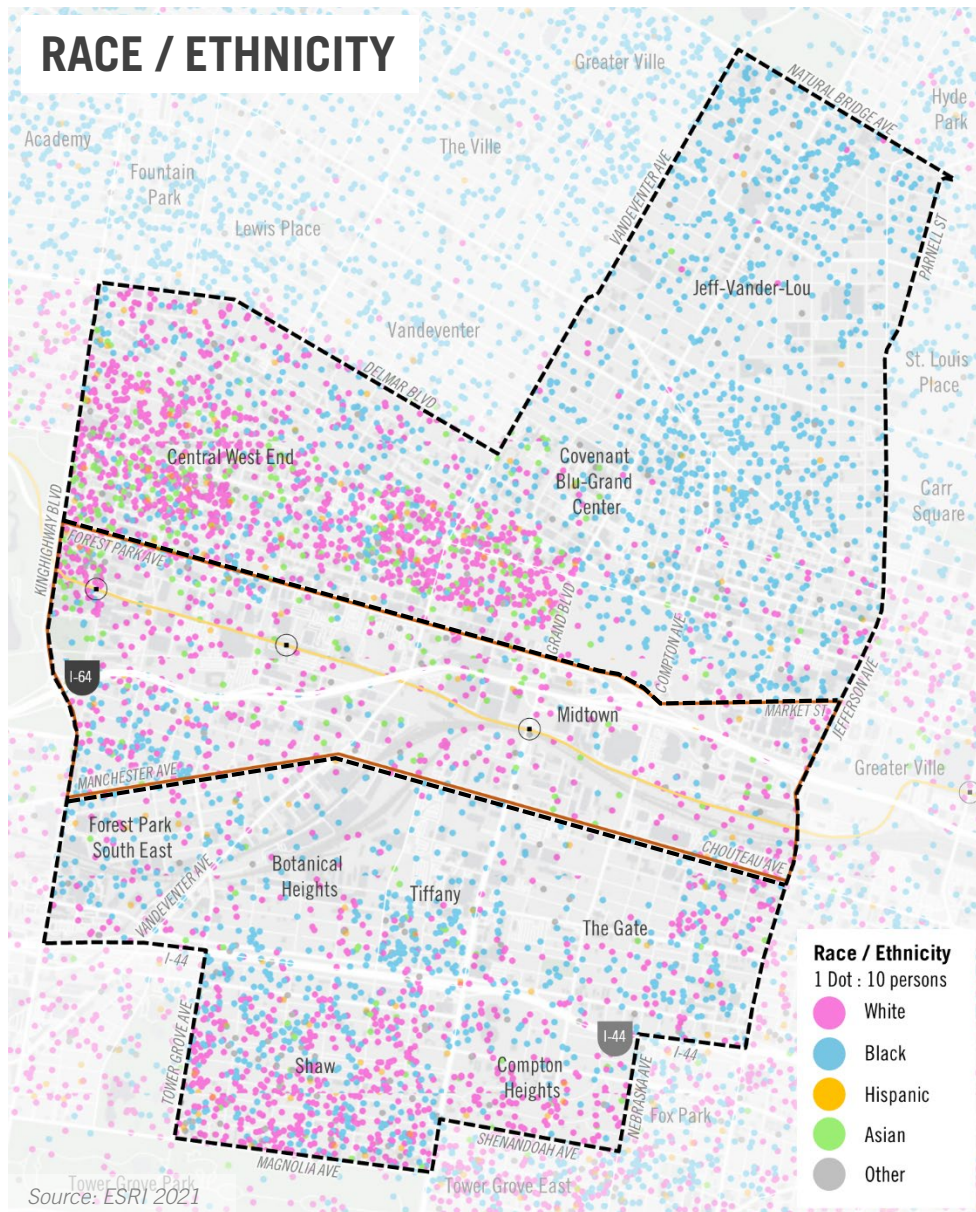
While households in the areas south of the Tier 2 Study Area and just north in Central West End generally have incomes comparable to, or above, the regional median, households living in the areas to the north and northeast generally have incomes below $30,000. This can be attributed to the large student population and weaker market conditions in Jeff-Vander-Lou.

RACE / ETHNICITY

Racial Composition of Residents, 2021
Source: ESRI

Legend:
- Tier 2 Boundary
- Community Assessment Boundary
- St. Louis City, MO
- St. Louis MSA
- USA

White: 51%, 44%
Black: 33%, 43%
Hispanic/Latino: 3%, 3%
Asian: 10%, 7%
Other / Mixed-Race: 3%, 4%

Racial Composition of Workers, 2019
Source: US Census Bureau (OntheMap),
LEHD Origin-Destination Employment Statistics (2002-2019)

Legend:
- Tier 2 Boundary
- Community Assessment Boundary
- St. Louis City, MO
- St. Louis MSA

White: 68%, 64%
Black: 23%, 31%
Hispanic/Latino: 3%, 3%
Asian: 6%, 4%
Other / Mixed-Race: 2%, 2%

Race / Ethnicity
1 Dot : 10 persons
- White
- Black
- Hispanic
- Asian
- Other

Source: ESRI 2021
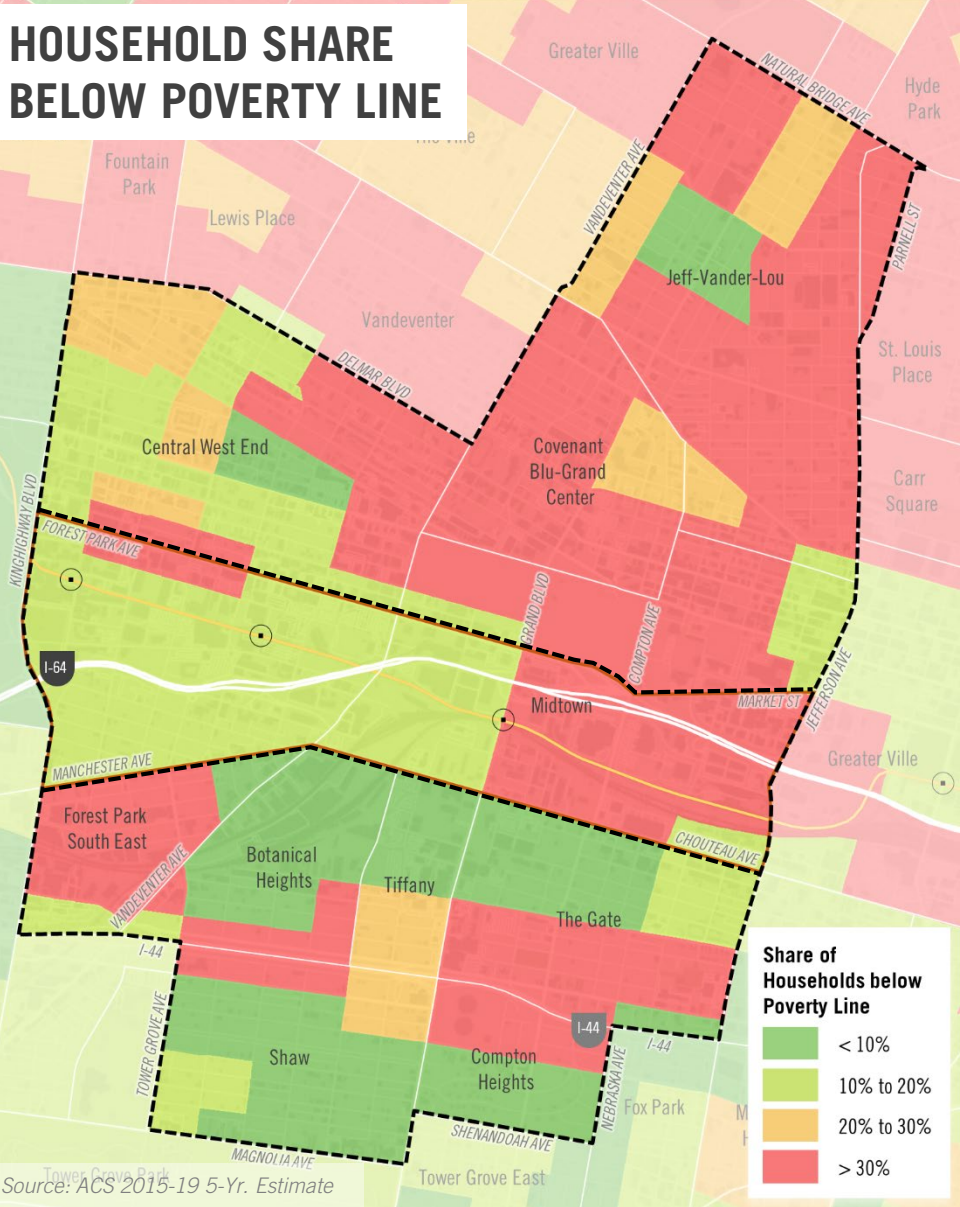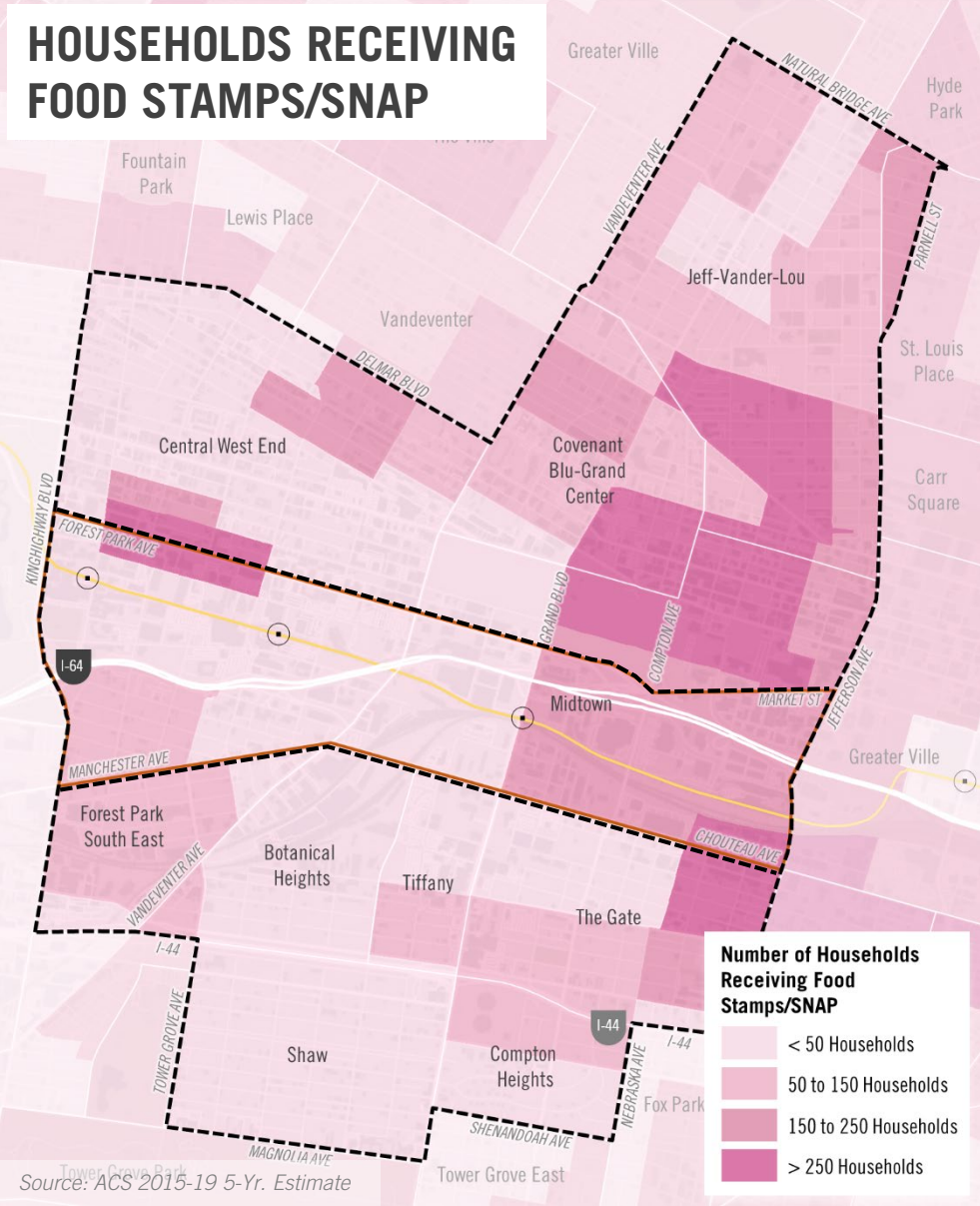
Overall racial composition in the Tier 2 Study Area and Community Assessment Boundary is similar to the city. But within the Community Assessment Boundary, there is greater diversity within neighborhoods. While Central West End and Shaw neighborhoods have relatively large White populations, there is a greater share of diversity. Areas to the north in and around Grand Center and Jeff-Vander-Lou are predominantly Black.

DEMOGRAPHICS: PEOPLE & HOUSEHOLDS
HOUSEHOLDS BELOW POVERTY LINE AND IN NEED OF ASSISTANCE

HOUSEHOLD SHARE BELOW POVERTY LINE

Share of Households below Poverty Line
- < 10%
- 10% to 20%
- 20% to 30%
- > 30%

Source: ACS 2015-19 5-Yr. Estimate

Poverty levels are significantly higher in the areas to the north in and around Covenant Blu-Grand Center and Jeff-Vander-Lou, as well as, along I-44 and the southern parts of Forest Park South East.

HOUSEHOLDS RECEIVING FOOD STAMPS/SNAP

Number of Households Receiving Food Stamps/SNAP
- < 50 Households
- 50 to 150 Households
- 150 to 250 Households
- > 250 Households

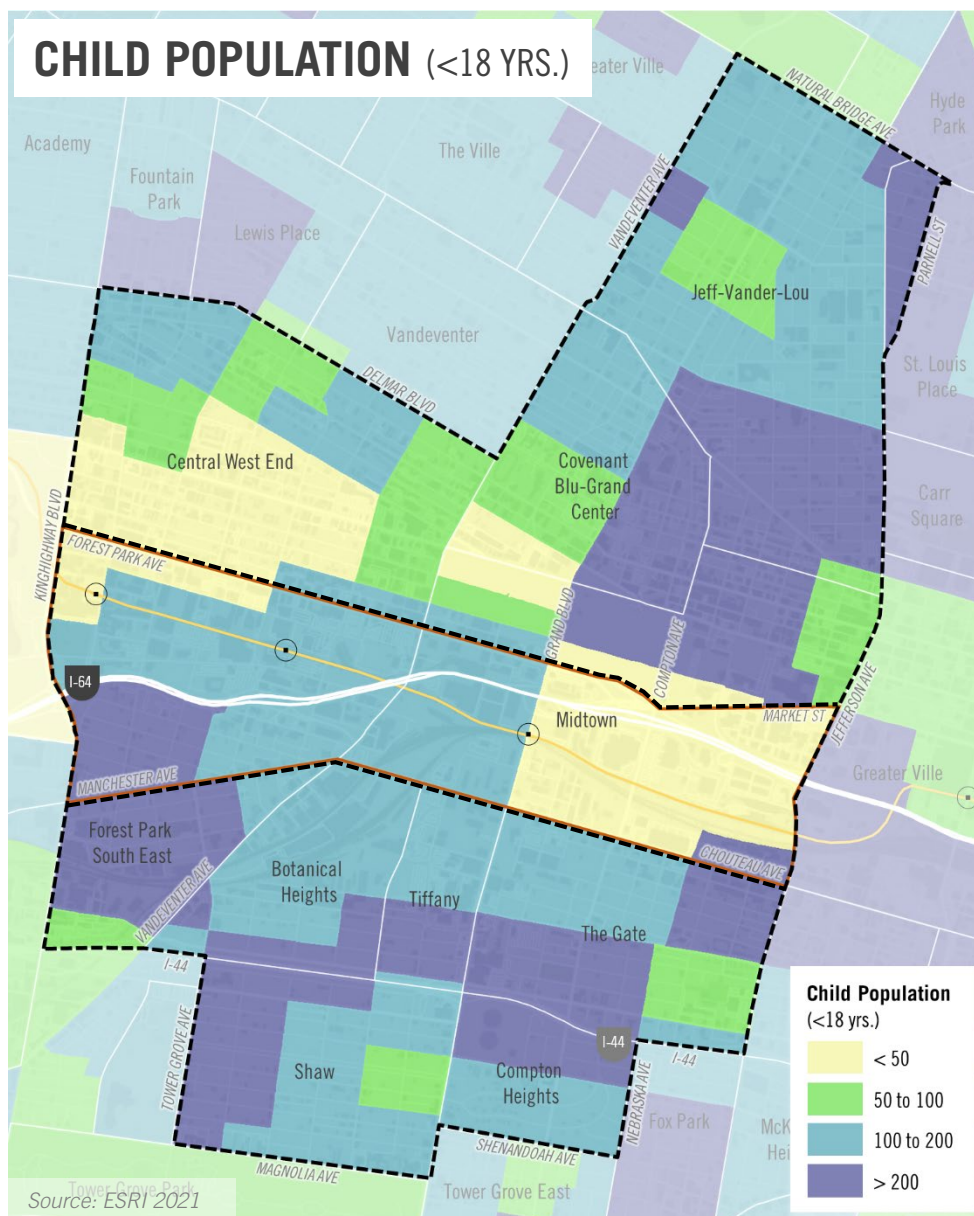*Source: ACS 2015-19 5-Yr. Estimate*

Areas with higher numbers of households receiving food stamps are generally consistent with the distribution of households living below the poverty line.

DEMOGRAPHICS: PEOPLE & HOUSEHOLDS
POPULATION OF CHILDREN AND SENIORS

CHILD POPULATION (<18 YRS.)

Child Population
(<18 yrs.)
- < 50
- 50 to 100
- 100 to 200
- > 200

Source: ESRI 2021

There are large concentrations of children in northeast and southern portions of the Community Assessment, whereas Central West End and Midtown have relatively few children.

SENIOR POPULATION (65+ YRS.)

Senior Population
(65+ yrs.)
- < 50
- 50 to 100
- 100 to 200
- > 200

Source: ESRI 2021
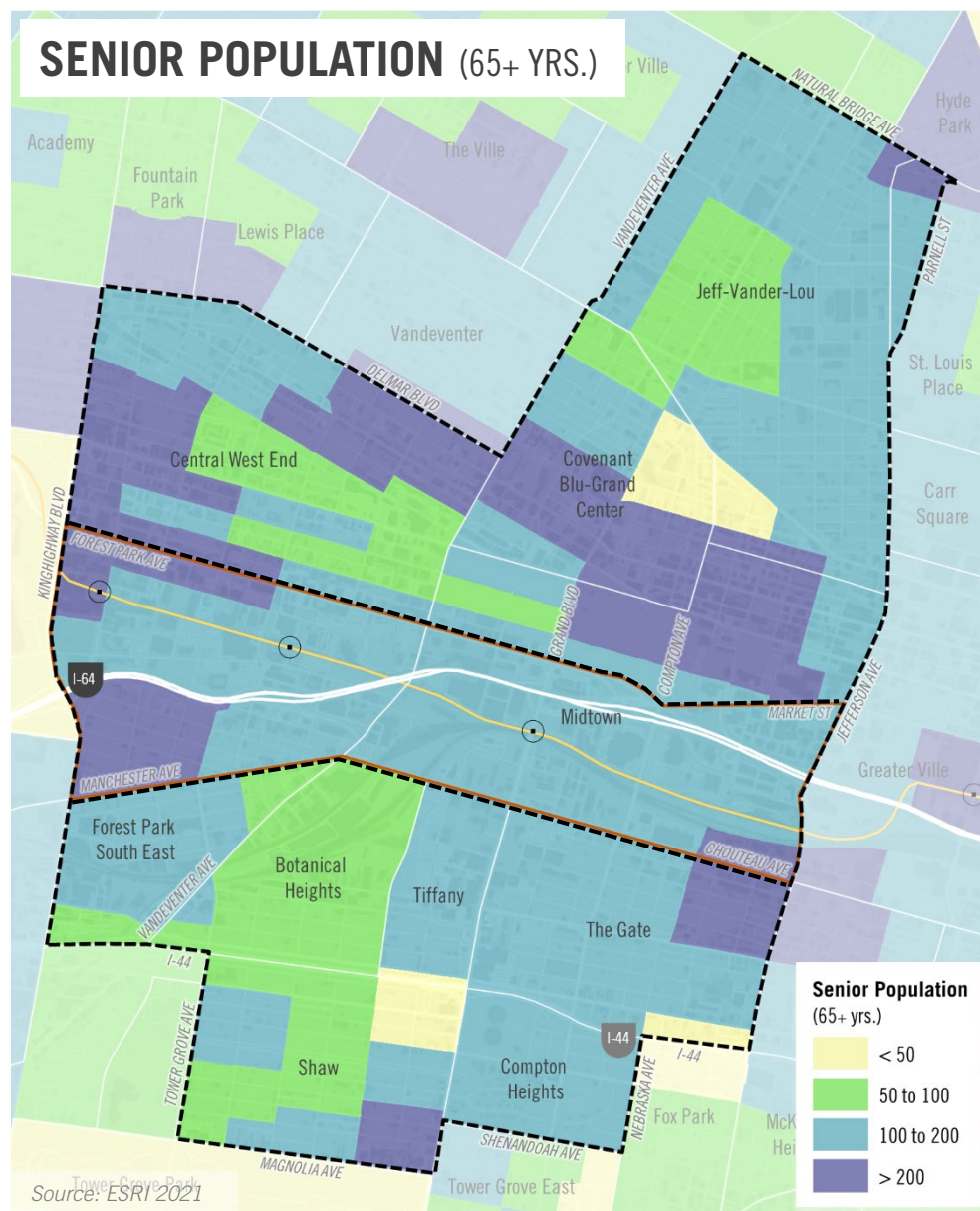
There is a larger senior population throughout the Community Assessment Area with higher concentrations in and around Central West End and Covenant Blue-Grand Center.

Community Assessment Framework
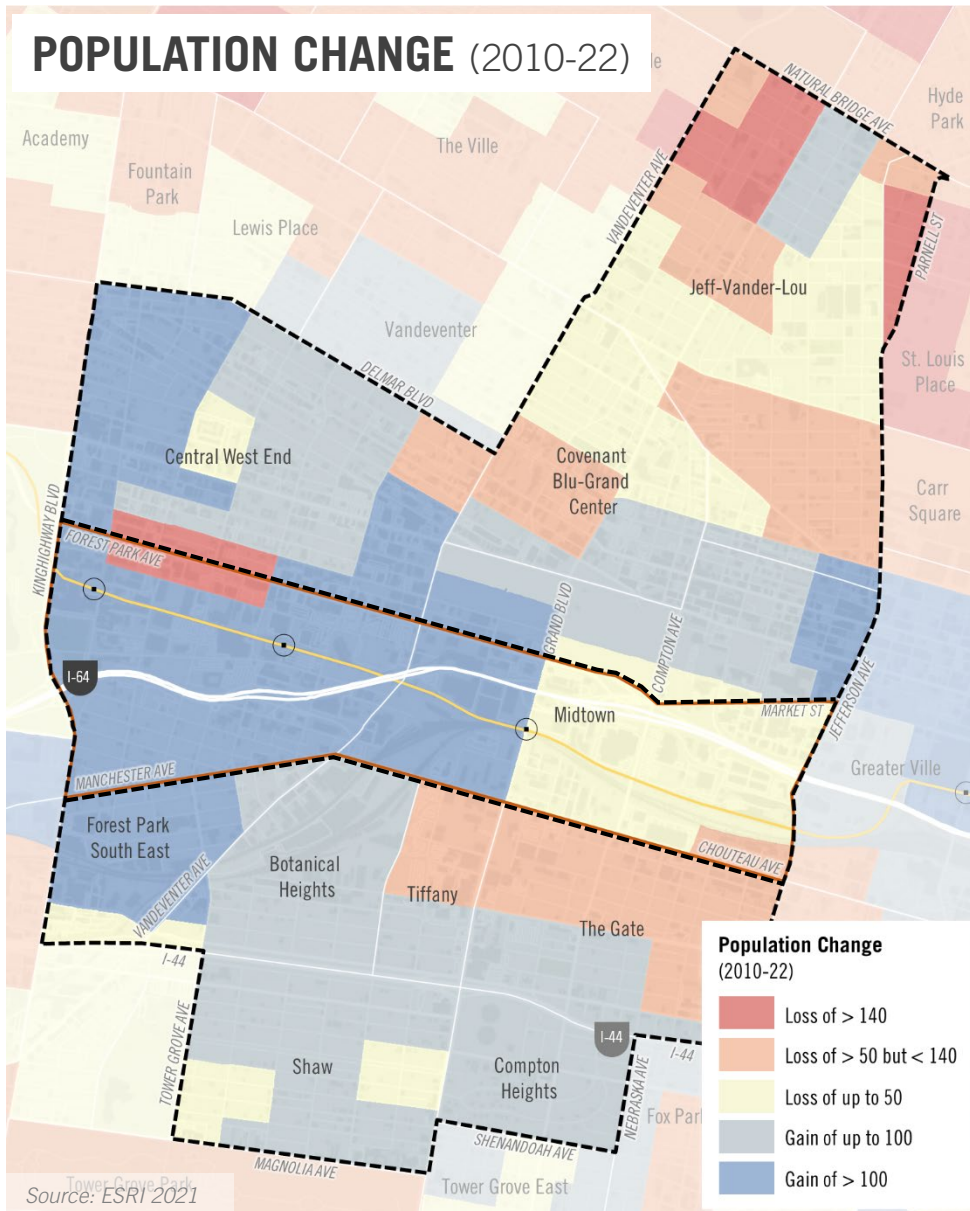
Introduction to Study Area

Market & Economy

People & Neighborhoods

Housing Overview

HOUSING OVERVIEW
POPULATION CHANGE & HOUSING UNITS

POPULATION CHANGE (2010-22)

Population Change (2010-22)
- Loss of > 140
- Loss of > 50 but < 140
- Loss of up to 50
- Gain of up to 100
- Gain of > 100

Source: ESRI 2021

Since 2010, population increased in most of the northwest, west, and southwest portions of the Community Assessment Area, while the east and southeast portions had little to no increases given the lack of new residential development.

HOUSING UNITS
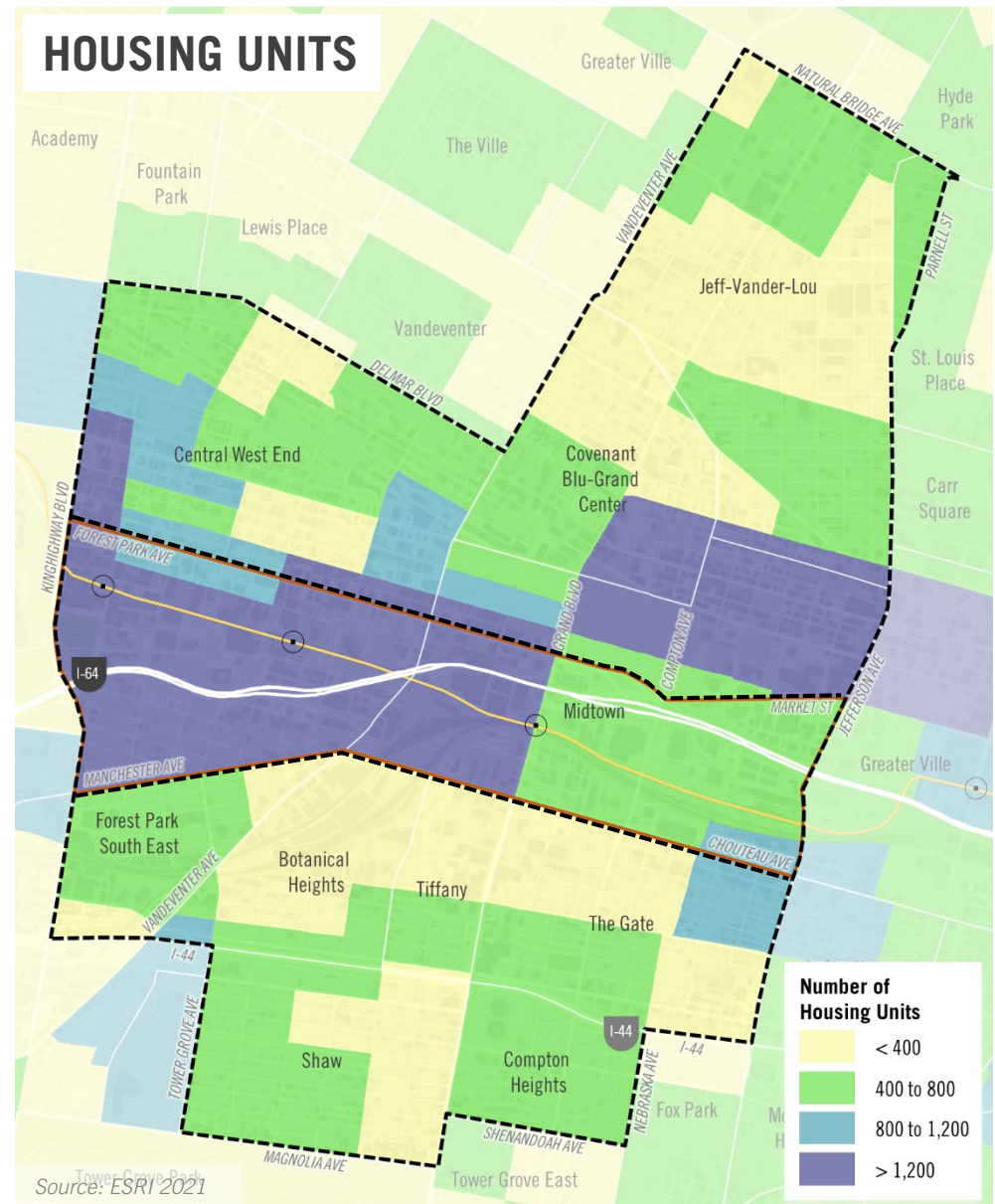
Number of Housing Units
- < 400
- 400 to 800
- 800 to 1,200
- > 1,200

Source: ESRI 2021

Housing density is higher in the western portions of the Tier 2 Study Area and in Central West End.

HOUSING OVERVIEW
HOUSING COMPOSITION: STUDY AREAS

HOUSING COMPOSITION

Description	Tier 2 Boundary	Community Assessment Boundary	St. Louis City, MO	St. Louis MSA	Missouri	USA
Total Housing Units (2021)	2,512	24,326	175,958	1,273,801	2,873,544	142,853,336
Total Housing Units (2010)	1,986	22,474	175,951	1,225,205	2,712,729	131,704,730
Net Change	526	1,852	7	48,596	160,815	11,148,606
% Change	26.5%	8.2%	0.0%	4.0%	5.9%	8.5%
Occupied Housing Units (2021)	1,862	19,647	140,064	1,142,310	2,497,270	126,470,675
Occupancy Rate	74%	81%	80%	90%	87%	89%
Vacancy Rate	26%	19%	20%	10%	13%	11%
Total Vacant Units	482	3,779	28,572	117,918	327,003	14,503,870
Housing Units by Units in Structure (2015-2019)						
1, Detached	17%	22%	43%	70%	70%	62%
1, Attached	4%	5%	3%	4%	3%	6%
2 to 4 Unit	22%	21%	29%	9%	8%	8%
Smaller-scale Multi-family (5-19 units)	6%	14%	9%	8%	7%	9%
Larger-scale Multi-family (20+ units)	50%	38%	16%	5%	5%	9%
Households by Household Type (2015 - 2019)						
Family Households	30%	35%	46%	64%	64%	65%
Non-Family Households	70%	65%	54%	36%	36%	35%
Median Housing Value (2021)	$242,000	$307,000	$166,000	$208,000	$184,000	$264,000
Percent Renter Occupied Units						
2021	81%	69%	54%	29%	32%	35%
2010	76%	70%	55%	29%	31%	35%
Change in renter-occupied (2010-2021)	34.1%	7.4%	-1.6%	4.0%	7.0%	9.5%
Percent Owner Occupied Units						
2021	19%	31%	46%	71%	68%	65%
2010	24%	30%	45%	71%	69%	65%
Change in owner-occupied (2010-2021)	2.2%	10.1%	2.0%	4.0%	5.5%	7.9%

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The Tier 2 Study area has just over 2,500 housing units, adding more than 500 net new units since 2010. The area has a much higher proportion of multi-family units (56 percent) compared to the city (25 percent) and region (13 percent) and a higher share of renter-occupied units (81 percent).

HOUSING OVERVIEW
HOUSING COMPOSITION: NEIGHBORHOODS

HOUSING COMPOSITION

Description	Central West End	Forest Park SE	Midtown	Covenant Blu-Grand Center	Jeff-Vander-Lou	St. Louis City, MO
Total Housing Units (2021)	10,380	2,532	1,823	1,644	2,951	175,958
Total Housing Units (2010)	9,162	1,871	1,514	1,663	3,084	175,951
Net Change	1,218	661	309	-19	-133	7
% Change	13.3%	35.3%	20.4%	-1.1%	-4.3%	0.0%
Occupied Housing Units (2021)	8,594	1,831	1,382	1,452	2,139	140,064
Occupancy Rate	83%	72%	76%	88%	72%	80%
Vacancy Rate	17%	28%	24%	12%	28%	20%
Total Vacant Units	1,479	507	334	170	589	28,572
Housing Units by Units in Structure (2015-2019)						
1, Detached	11%	31%	4%	10%	29%	43%
1, Attached	4%	6%	2%	9%	3%	3%
2 to 4 Unit	8%	32%	12%	17%	39%	29%
Smaller-scale Multi-family (5-19 units)	14%	7%	12%	16%	8%	9%
Larger-scale Multi-family (20+ units)	63%	23%	69%	48%	21%	16%
Households by Household Type (2015 - 2019)						
Family Households	22%	43%	19%	32%	53%	46%
Non-Family Households	78%	57%	81%	68%	47%	54%
Median Housing Value (2021)	$378,000	$237,000	$277,000	$113,000	$102,000	$166,000
Percent Renter Occupied Units						
2021	74%	73%	94%	93%	70%	54%
2010	74%	65%	93%	93%	71%	55%
Change in renter-occupied (2010-2021)	13.6%	53.2%	21.5%	-1.5%	-6.3%	-1.6%
Percent Owner Occupied Units						
2021	26%	27%	6%	7%	30%	46%
2010	26%	35%	7%	7%	29%	45%
Change in owner-occupied (2010-2021)	12.3%	2.5%	5.9%	4.1%	0.6%	2.0%

© ESRI, 2021

Median housing values in Central West End ($378,000) are significantly higher than the other study areas and city median ($166,000). Development activity has been strong in Central West End and Forest Park Southeast adding approximately 1,200 and 660 new units, respectively. The city's housing stock, on the other hand, generally did not experience a significant net increase given increasing vacancy in other parts of the city.

HOUSING OVERVIEW
HOUSING COMPOSITION: NEIGHBORHOODS

HOUSING COMPOSITION

| Description	Botanical Heights	Tiffany	The Gate	Shaw	Compton Heights	St. Louis City, MO
Total Housing Units (2021)	590	565	1,706	3,841	808	175,958
Total Housing Units (2010)	530	531	1,744	3,633	728	175,951
Net Change	60	34	-38	208	80	7
% Change	11.3%	6.4%	-2.2%	5.7%	11.0%	0.0%
Occupied Housing Units (2021)	422	472	1,479	3,062	676	140,064
Occupancy Rate	72%	84%	87%	80%	84%	80%
Vacancy Rate	28%	16%	13%	20%	16%	20%
Total Vacant Units	120	78	197	621	110	28,572
Housing Units by Units in Structure (2015-2019)						
1, Detached	34%	19%	39%	35%	54%	43%
1, Attached	5%	3%	12%	3%	1%	3%
2 to 4 Unit	53%	42%	12%	40%	7%	29%
Smaller-scale Multi-family (5-19 units)	6%	35%	17%	14%	15%	9%
Larger-scale Multi-family (20+ units)	2%	0%	19%	8%	22%	16%
Households by Household Type (2015 - 2019)						
Family Households	55%	55%	45%	48%	48%	46%
Non-Family Households	45%	45%	55%	52%	52%	54%
Median Housing Value (2021)	$291,000	$190,000	$260,000	$313,000	$382,000	$166,000
Percent Renter Occupied Units						
2021	60%	72%	49%	52%	43%	54%
2010	62%	74%	52%	55%	46%	55%
Change in renter-occupied (2010-2021)	7.4%	3.7%	-6.7%	0.6%	3.6%	-1.6%
Percent Owner Occupied Units						
2021	40%	28%	51%	48%	57%	46%
2010	38%	26%	48%	45%	54%	45%
Change in owner-occupied (2010-2021)	17.9%	14.1%	2.6%	11.9%	17.3%	2.0%

© ESRI, 2021

Housing values in the neighborhoods to the south are higher than the citywide median and Shaw and Compton Heights have values comparable to Central West End. There has been limited new development in these neighborhoods given the lack of larger-scale development-ready parcels.

HOUSING OVERVIEW
OWNER-RENTER & VACANCY

OWNER - RENTER

Owner - Renter
1 Dot : 10 households
- Owner Household
- Renter Household

Source: ESRI 2021
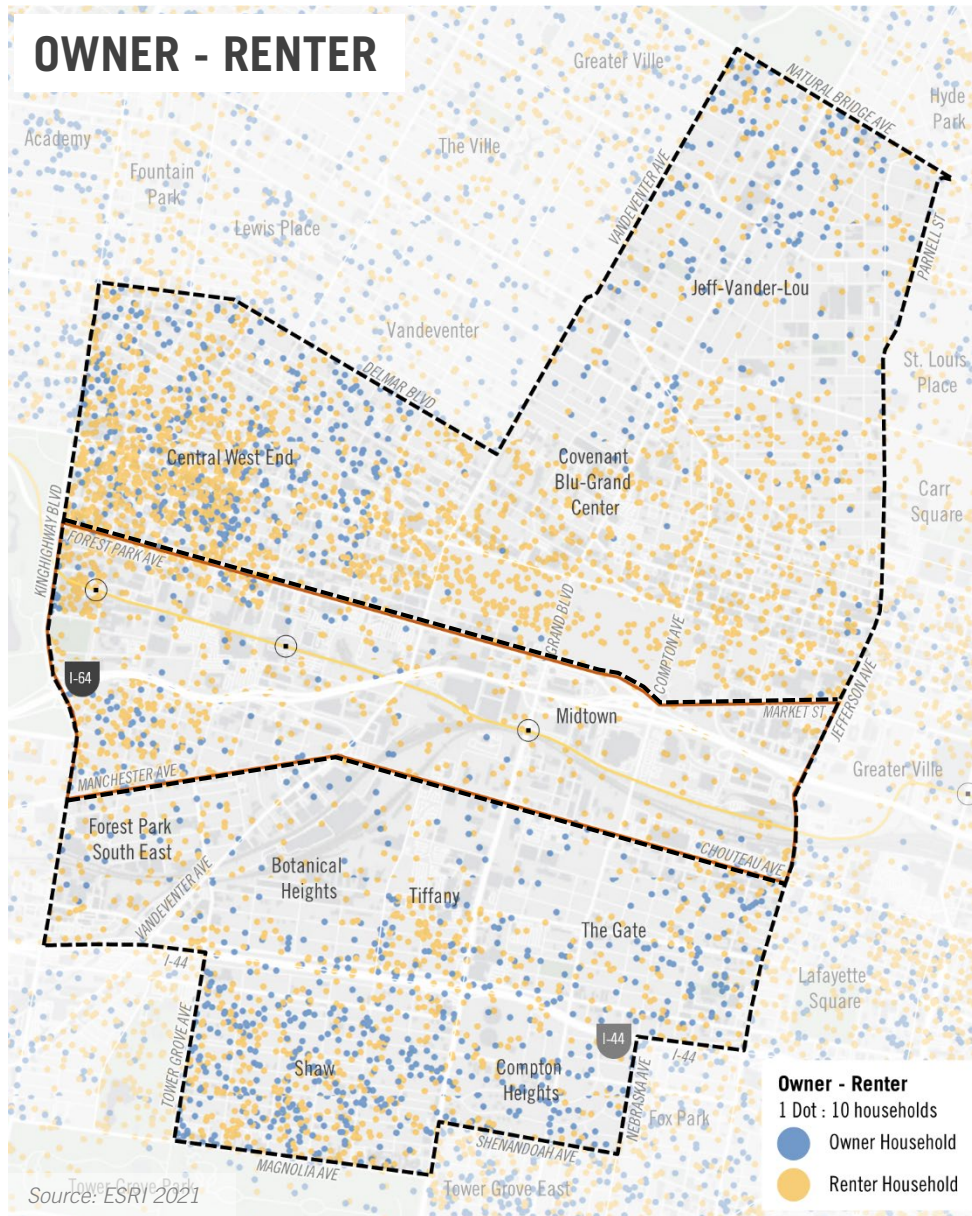
There is a high concentration of renter-occupied housing north of the Tier 2 Study Area, whereas the area to the south has a higher concentration of owner-occupied housing.
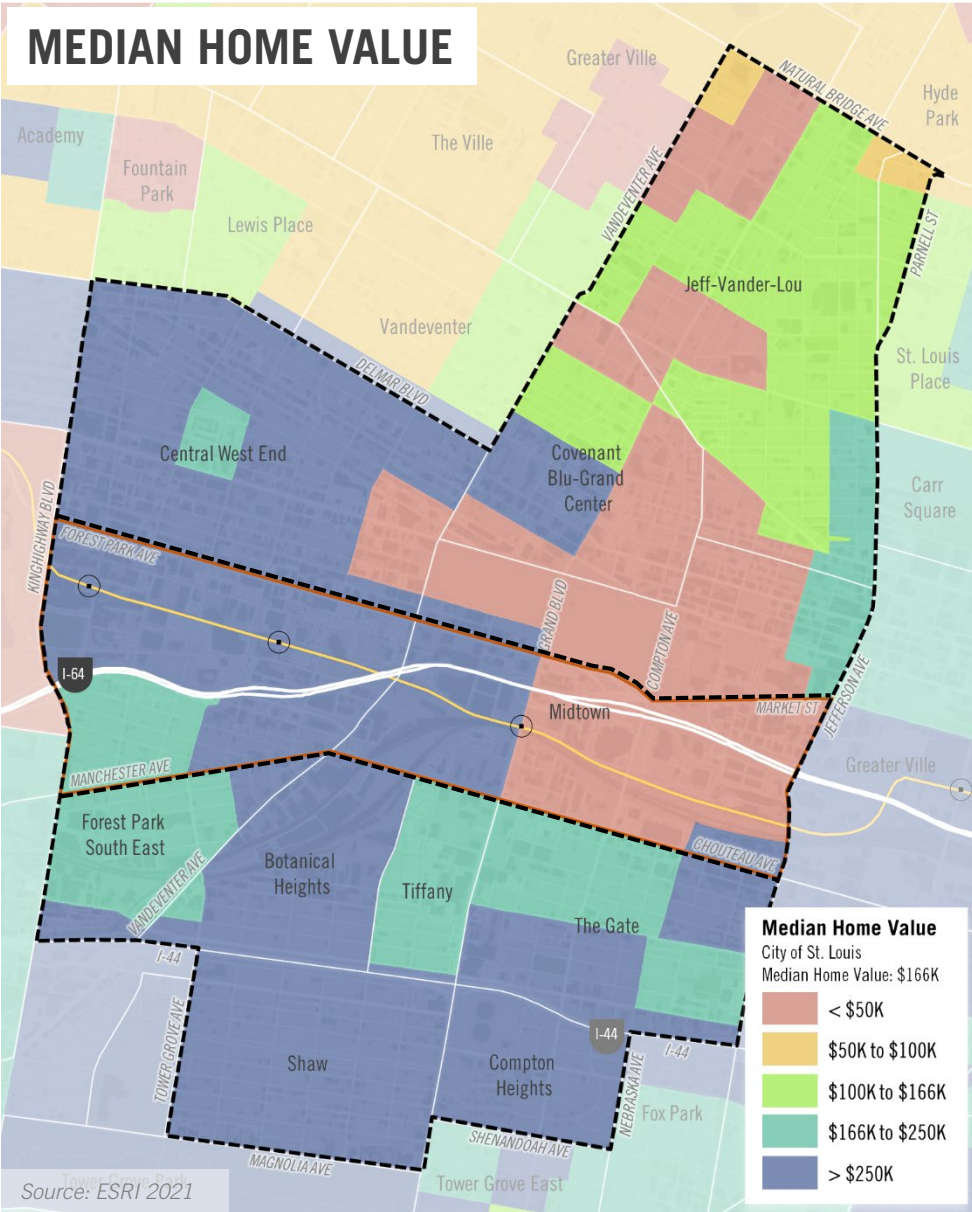
HOUSING VACANCY

Housing Vacancy Rate
- < 10%
- 10% to 20%
- 20% to 35%
- > 35%

Source: ESRI 2021
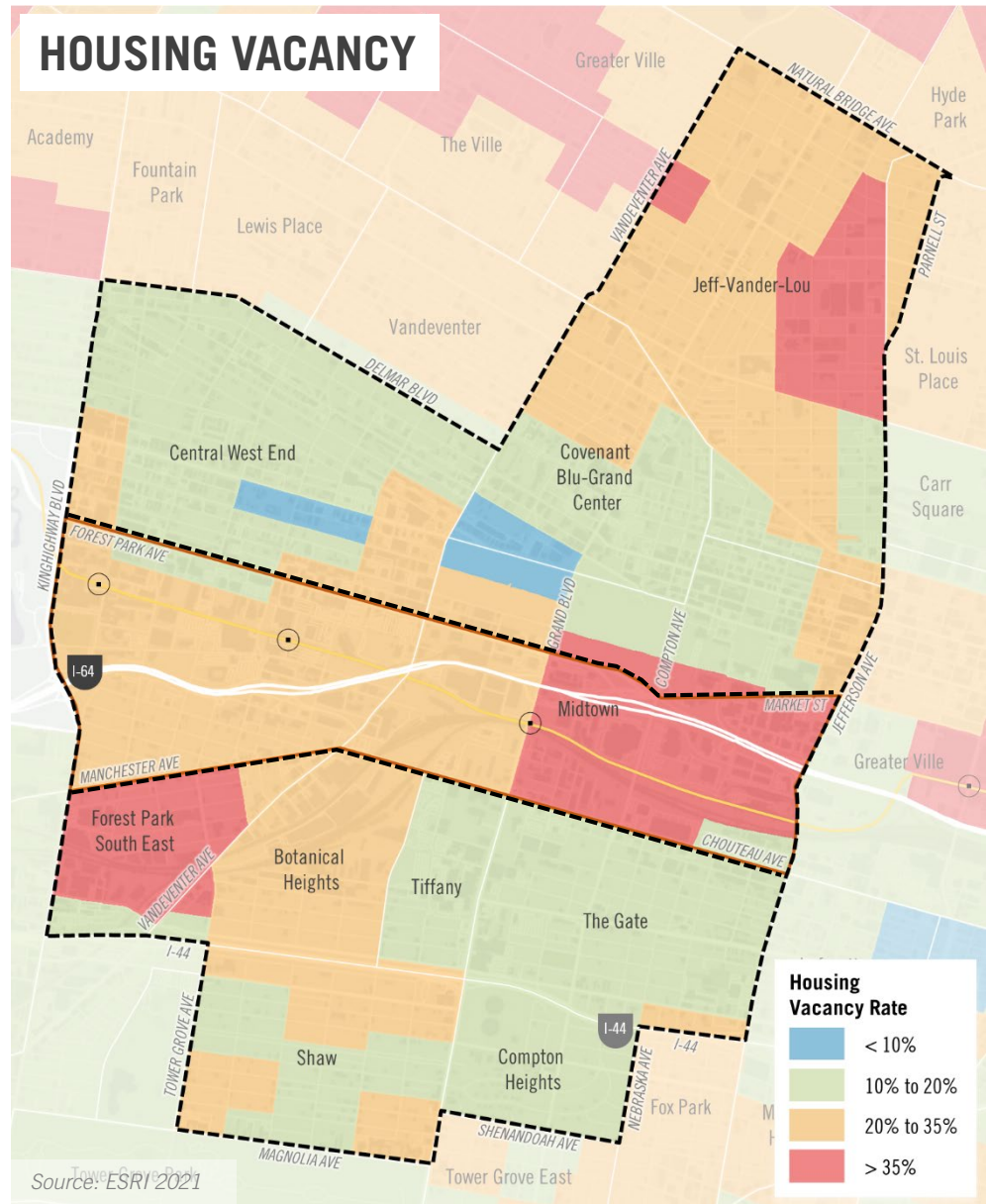
The high vacancy rate in Forest Park South East can be attributed to decades of disinvestment, with the housing stock needing substantial rehabilitation to be marketable. Midtown's high vacancy rate is skewed by its primarily industrial and institutional land uses and sizable renter population.
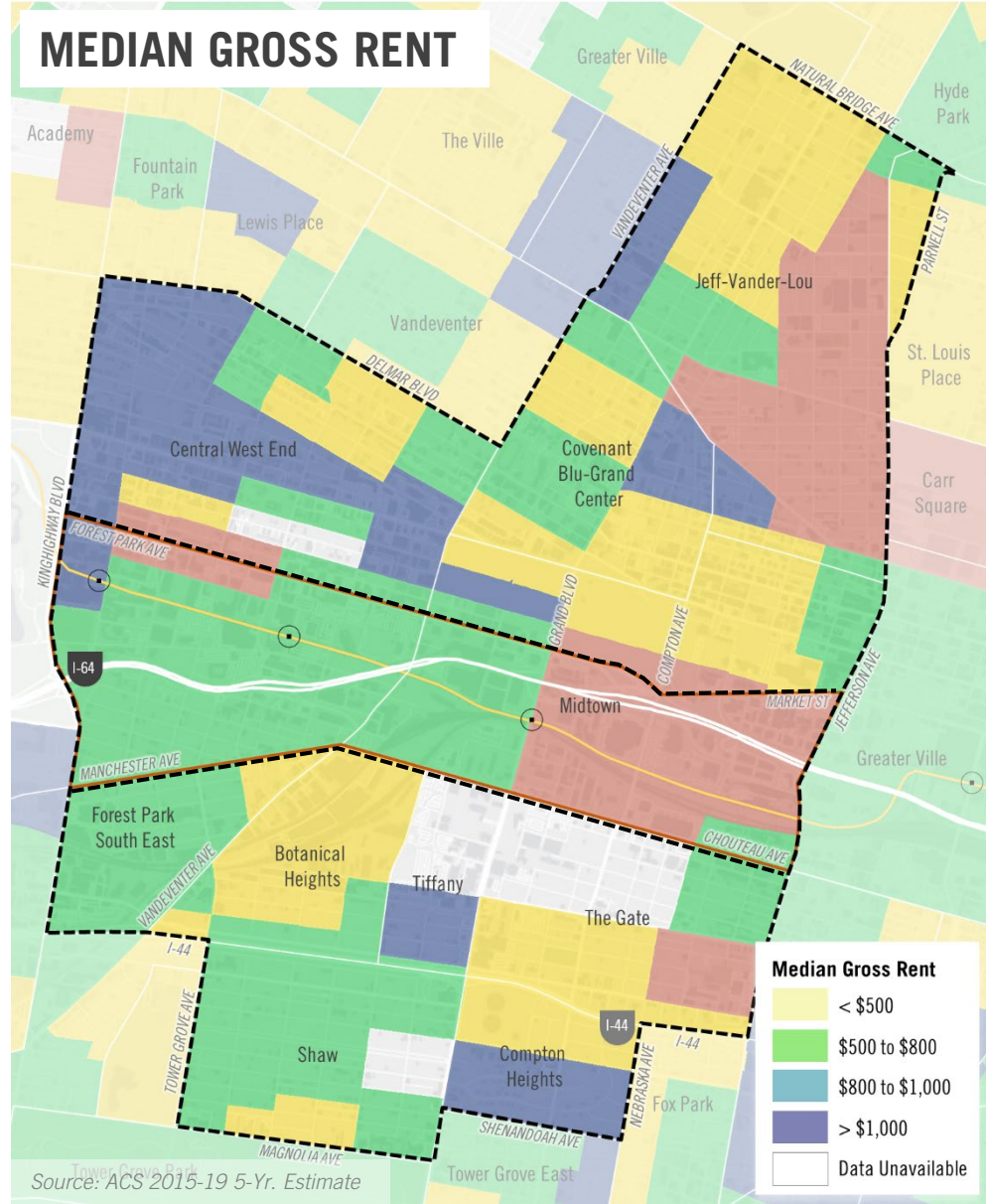
HOUSING OVERVIEW
HOME VALUE & RENT

MEDIAN HOME VALUE

Median Home Value
City of St. Louis
Median Home Value: $166K

- < $50K
- $50K to $100K
- $100K to $166K
- $166K to $250K
- > $250K

Source: ESRI 2021

Median home values are significantly higher in the northwest, west, and southwest portions of the Community Assessment Area.

MEDIAN GROSS RENT

Median Gross Rent

- < $500
- $500 to $800
- $800 to $1,000
- > $1,000
- Data Unavailable

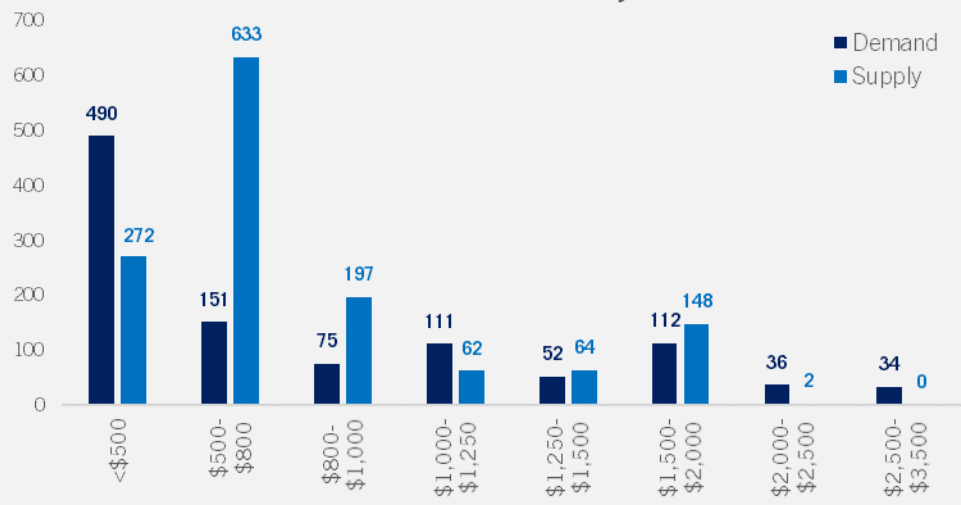*Source: ACS 2015-19 5-Yr. Estimate*

Median gross rents are somewhat consistent with home value with Central West End and Compton Heights achieving the highest rents.

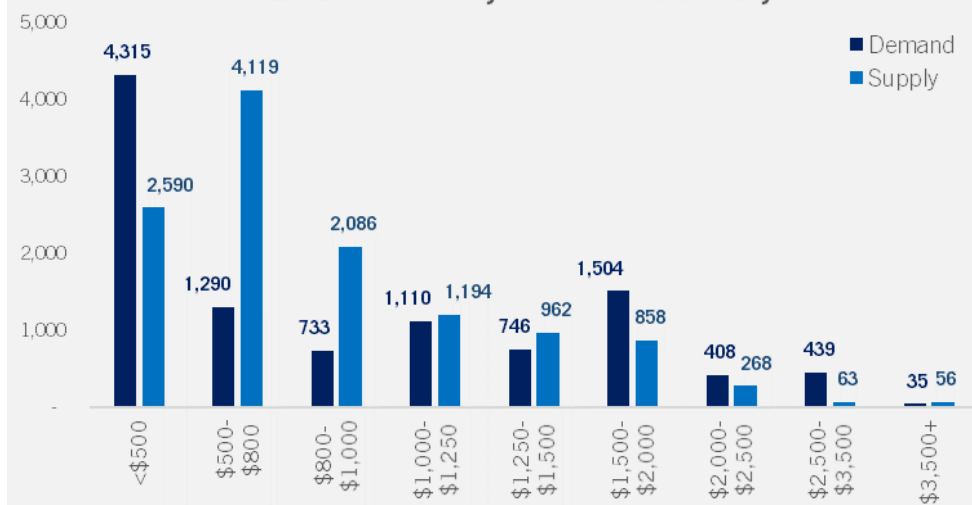# HOUSING OVERVIEW
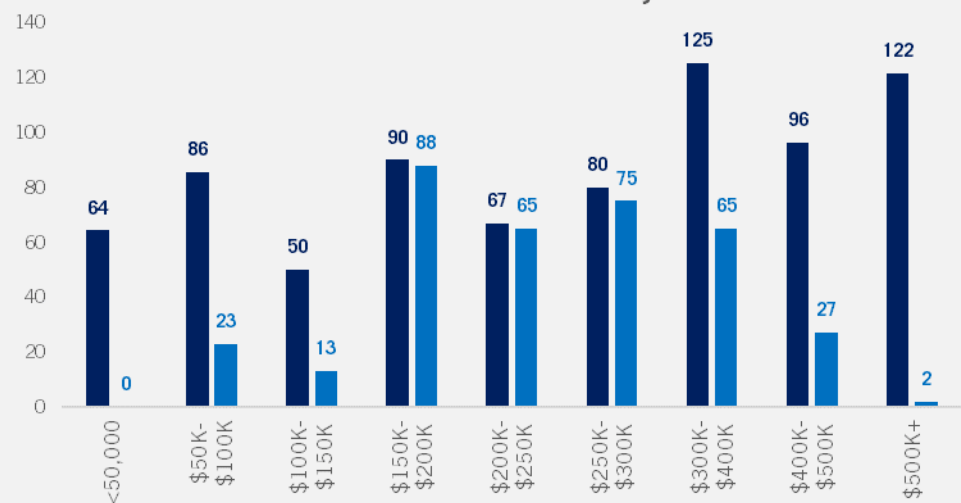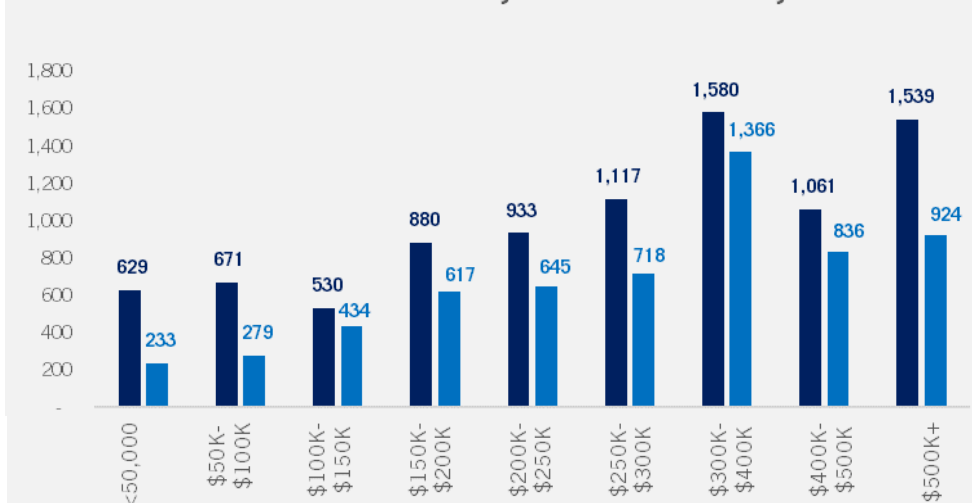## HOUSING AFFORDABILITY AND VALUE

Rental - Tier 2 Boundary

■ Demand
■ Supply

Rent Range	Demand	Supply
<$500	490	272
$500-$800	151	633
$800-$1,000	75	197
$1,000-$1,250	111	62
$1,250-$1,500	52	64
$1,500-$2,000	112	148
$2,000-$2,500	36	2
$2,500-$3,500	34	0

Rental - Community Assessment Boundary

■ Demand
■ Supply

Rent Range	Demand	Supply
<$500	4,315	2,590
$500-$800	1,290	4,119
$800-$1,000	733	2,086
$1,000-$1,250	1,110	1,194
$1,250-$1,500	746	962
$1,500-$2,000	1,504	858
$2,000-$2,500	408	268
$2,500-$3,500	439	63
$3,500+	35	56

For-Sale - Tier 2 Boundary

Price Range	Demand	Supply
<50,000	64	0
$50K-$100K	86	23
$100K-$150K	50	13
$150K-$200K	90	88
$200K-$250K	67	65
$250K-$300K	80	75
$300K-$400K	125	65
$400K-$500K	96	27
$500K+	122	2

For-Sale - Community Assessment Boundary

Price Range	Demand	Supply
<50,000	629	233
$50K-$100K	671	279
$100K-$150K	530	434
$150K-$200K	880	617
$200K-$250K	933	645
$250K-$300K	1,117	718
$300K-$400K	1,580	1,366
$400K-$500K	1,061	836
$500K+	1,539	924

Source: Development Strategies 2022

Source: Development Strategies 2022

Supply is based on distribution of housing by value or rent according to ESRI.
Demand is based on what a household could afford in terms of rent or purchase price based on household income.

Community Assessment Framework

Introduction to Study Area

Market & Economy

People & Neighborhoods
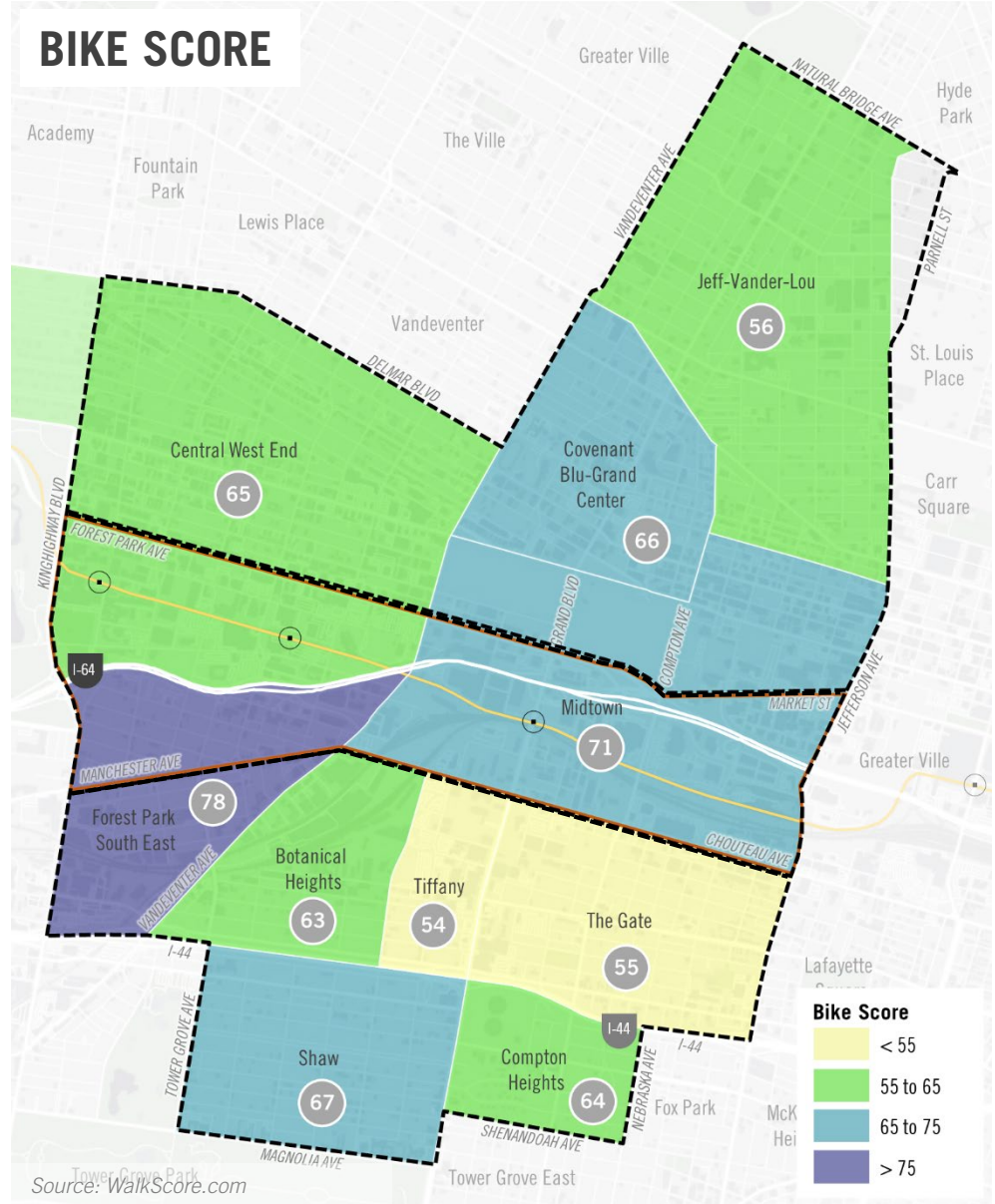
Transportation
Equity

TRANSPORTATION EQUITY
NEIGHBORHOOD WALK SCORE AND BIKE SCORE

WALK SCORE

Jeff-Vander-Lou **65**

Central West End **78**

Covenant Blu-Grand Center **70**

Midtown **68**

Forest Park South East **82**

Botanical Heights **53**

Tiffany **48**

The Gate **63**

Shaw **64**

Compton Heights **73**

Source: WalkScore.com

Walk Score
- < 50
- 50 to 65
- 65 to 80
- > 80
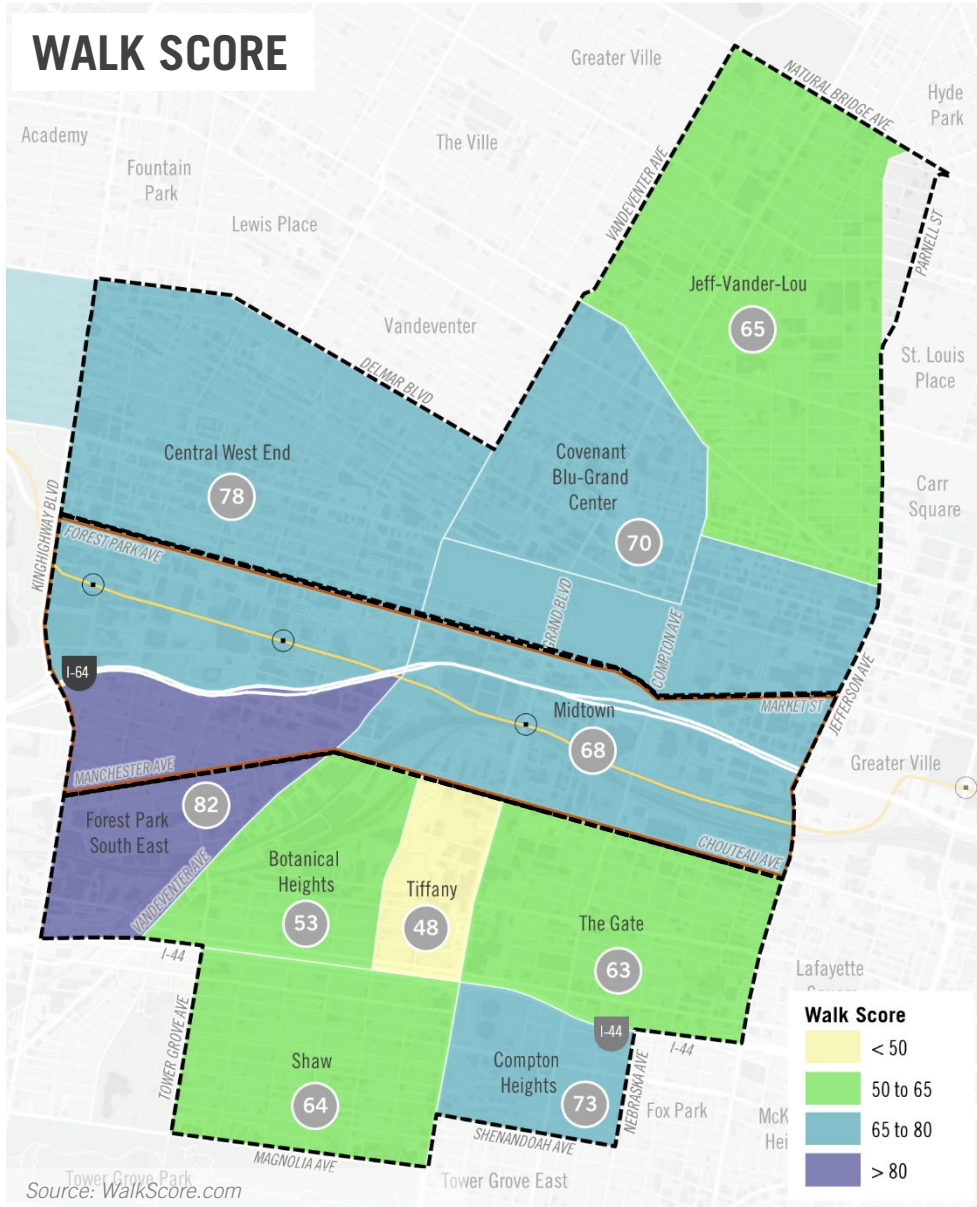
The walkability of neighborhoods — which considers availability of infrastructure, connectivity, accessibility, and quality of the built environment — varies across the study area.

BIKE SCORE

Jeff-Vander-Lou **56**

Central West End **65**

Covenant Blu-Grand Center **66**

Midtown **71**

Forest Park South East **78**

Botanical Heights **63**

Tiffany **54**

The Gate **55**

Shaw **67**

Compton Heights **64**

Source: WalkScore.com

Bike Score
- < 55
- 55 to 65
- 65 to 75
- > 75

With several projects proposed in the study area, scores measuring active transportation are poised to improve in the coming years.
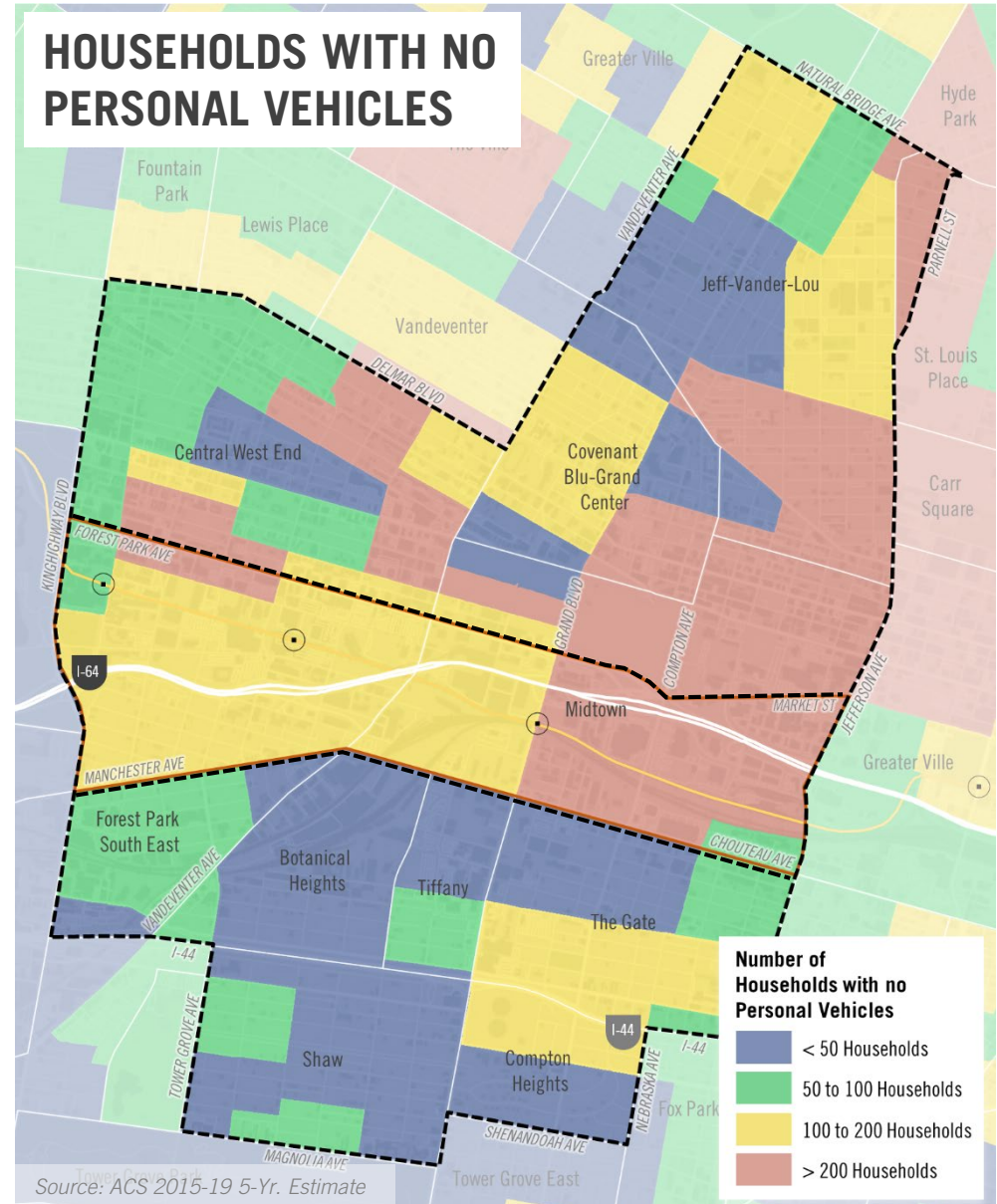
TRANSPORTATION EQUITY
ANNUAL TRANSPORTATION COST & HOUSEHOLDS WITH NO PERSONAL VEHICLES

AVERAGE ANNUAL TRANSPORTATION COST

Average Annual Transportation Cost
Consumer Spending on vehicle payments, fuel, maintenance, transit etc.

- < $4K
- $4K to $8K
- $8K to $12K
- > $12K

Source: ESRI 2021, Bureau of Labor Statistics
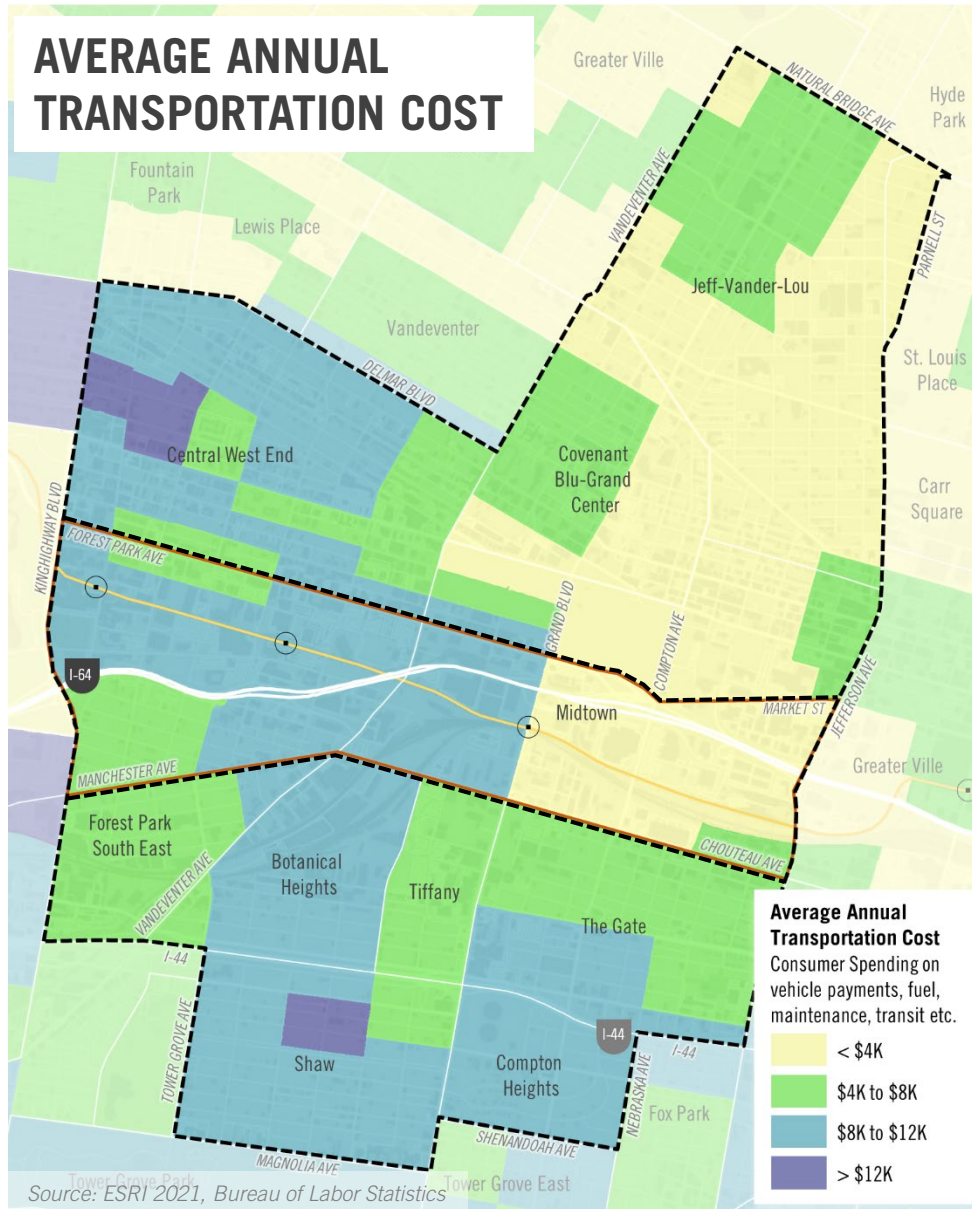
Distribution of housing transportation costs are generally consistent with the distribution of median household income (e.g. higher-income households spend more on transportation).

HOUSEHOLDS WITH NO PERSONAL VEHICLES

Number of Households with no Personal Vehicles

- < 50 Households
- 50 to 100 Households
- 100 to 200 Households
- > 200 Households

Source: ACS 2015-19 5-Yr. Estimate

There is a larger concentration of households without a vehicle in the east and northeast portions of the Community Assessment Area given the student population and weaker socio-economic conditions.

TRANSPORTATION EQUITY
HOUSEHOLDS WITH DISABLED PERSONS & MINORITY POPULATIONS

HOUSEHOLDS WITH DISABLED PERSONS

Number of Households with at least one Disabled Person

- < 50 Households
- 50 to 100 Households
- 100 to 200 Households
- > 200 Households

Source: ACS 2015-19 5-Yr. Estimate
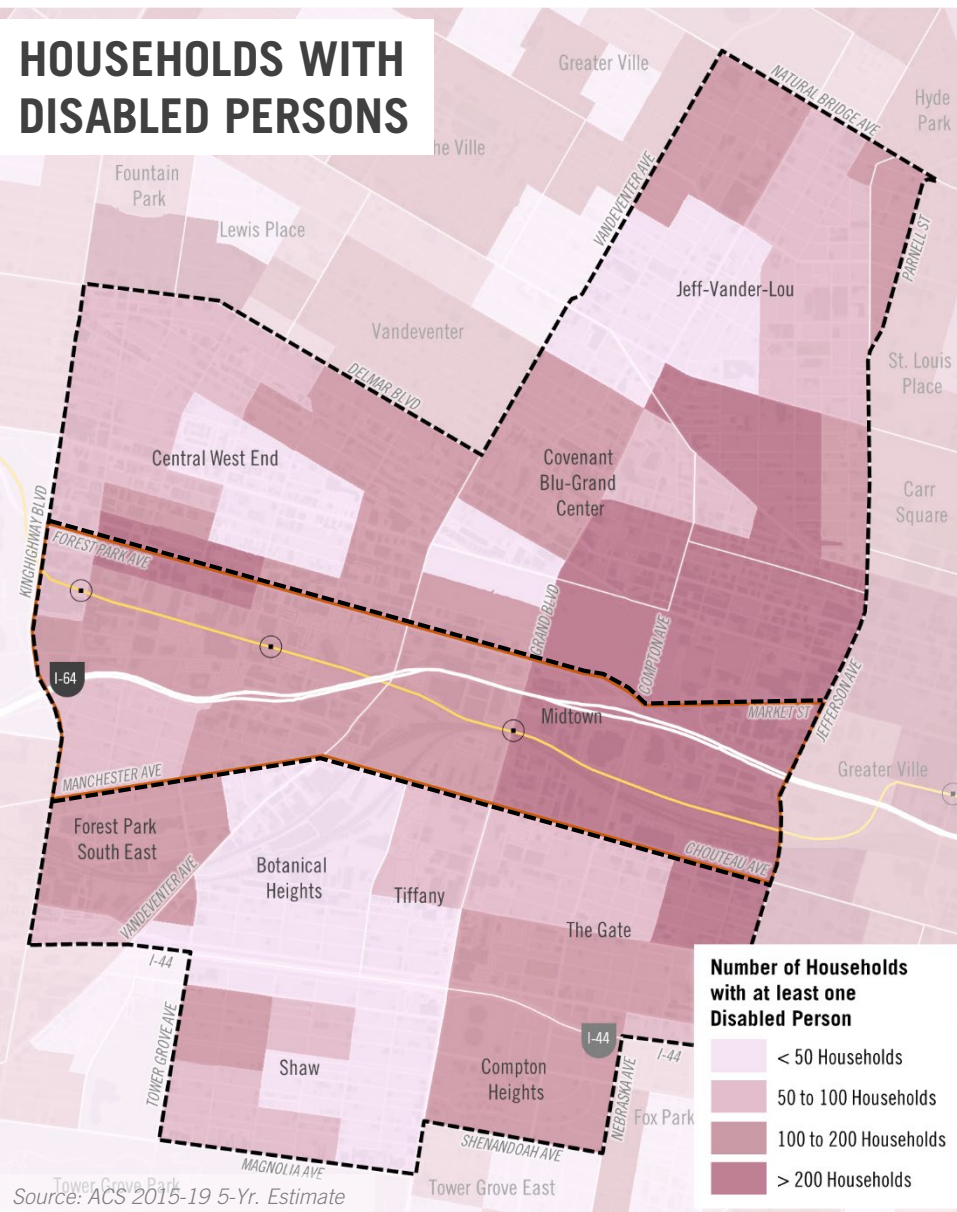
The distribution of households with disabled persons is generally consistent with the distribution of persons aged 65 and older.


SHARE OF MINORITY POPULATIONS

Share of Non-white Populations

- < 20%
- 20% to 40%
- 40% to 60%
- > 60%

Source: ESRI 2021
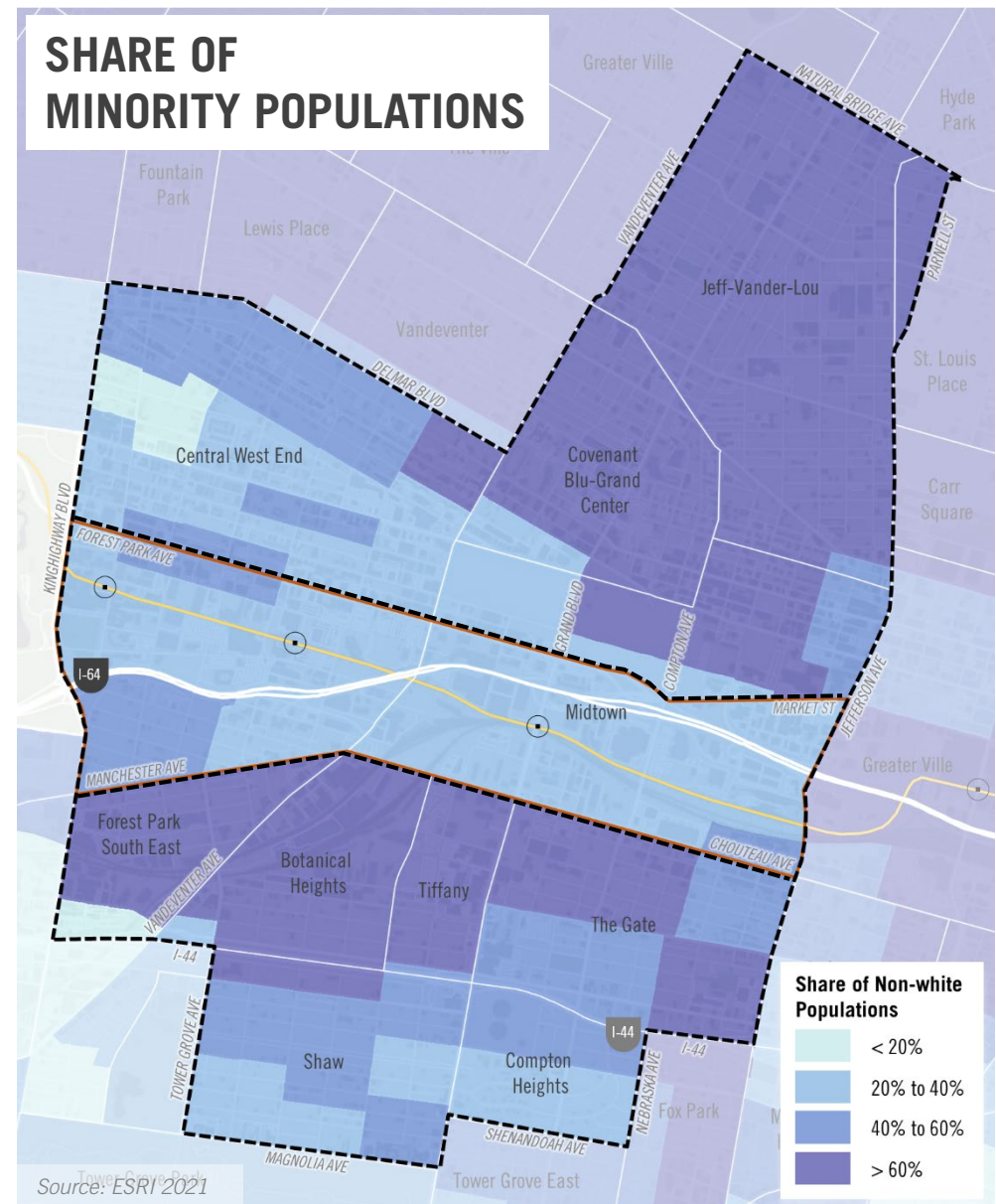
The Tier 2 Study Area and Central West End have relatively low non-white populations with higher concentrations to the south and around Covenant Blu-Grand Center and Jeff-Vander-Lou.

TRANSPORTATION EQUITY
USDOT DEFINED 'DISADVANTAGED COMMUNITIES' (DAC)

DISADVANTAGED COMMUNITIES

Disadvantaged Communities Identified by USDOT
- DAC Census Tracts
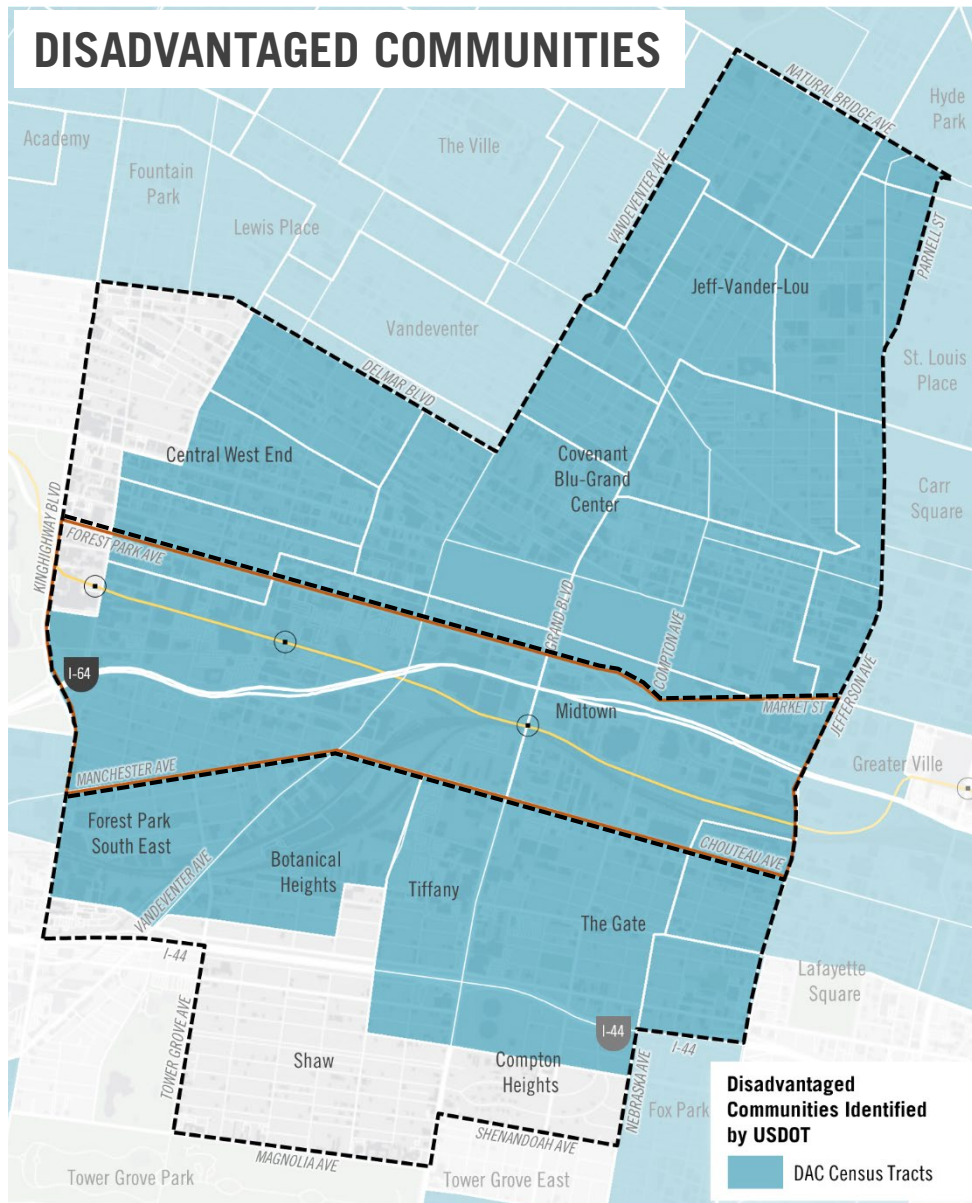
The DOT DACs have been developed using data for 22 indicators collected at the census tract level and grouped into six (6) categories of transportation disadvantage. The numbers in parenthesis show how many indicators fall in that category:

- **Transportation access disadvantage** identifies communities and places that spend more, and take longer, to get where they need to go. (4)

- **Health disadvantage** identifies communities based on variables associated with adverse health outcomes, disability, as well as environmental exposures. (3)

- **Environmental disadvantage** identifies communities with disproportionately high levels of certain air pollutants and high potential presence of lead-based paint in housing units. (6)

- **Economic disadvantage** identifies areas and populations with high poverty, low wealth, lack of local jobs, low homeownership, low educational attainment, and high inequality. (7)

- **Resilience disadvantage** identifies communities vulnerable to hazards caused by climate change. (1)

- **Social disadvantage** identifies communities with a shared history of discrimination, or other forms of disadvantage that warrant consideration along with each/any of the above measures. (1)

With the exception of portions of Shaw, Compton Heights, and Central West End, the entire Community Assessment Area consists of USDOT designated Disadvantaged Communities (DACs).

TRANSPORTATION EQUITY
UNDERLYING INDICATORS IN DOT DEFINITION OF DISADVANTAGED COMMUNITIES

| Variable	Description
>30 min commute	Percent of total population with a drive time to employment greater than or equal to 30 minutes
No Vehicle	Percent of total population with no vehicle(s) available
Walkability	A composite index of economic and built environment characteristics representing the extent to which the location is supportive to walking
Transportation Burden	Transportation Costs % Income for the Regional Typical Household
Population 65 and older	Percent of total population over age 64
Uninsured	Percent of population without health insurance
Disability	Percent of the non-institutionalized population with any disability
Homes Built Before 1960	Percent of housing units built before 1960 (lead paint indicator)
Diesel	EJ Index for Diesel particulate matter level in air
Cancer	EJ Index for Air toxics cancer risk
Traffic Proximity	EJ Index for Traffic proximity and volume
PM25	EJ Index for PM2.5 level in air
Ozone	Ozone level in air
Less HS Education	Percent of total population, age 25 and older, whose reported education is short of a high school diploma
Renters	Proportion of occupied housing units not occupied by property owners
Unemployment	Percent of civilian labor force reported as unemployed
GINI Index	Endemic inequality
Low Income	Percent of total population reported at or below area median income
Poverty	Percent of population below Federal Poverty Level
Housing Costs	Housing Costs % Income for the Regional Typical Household
Climate Hazards	Expected annual loss of life (fatalities and injuries) from 18 climate hazards
Linguistic Isolation	Percent of households (interpreted as individuals) in linguistic isolation

NEIGHBORHOOD ASSESSMENT

Classification Factors
- Total Crime Index
- Share of Households below Poverty Line
- Median Home Value
- Population Change (2010-22)

Neighborhood Assessment
- Growing
- Stable
- Transitional
- Opportunity
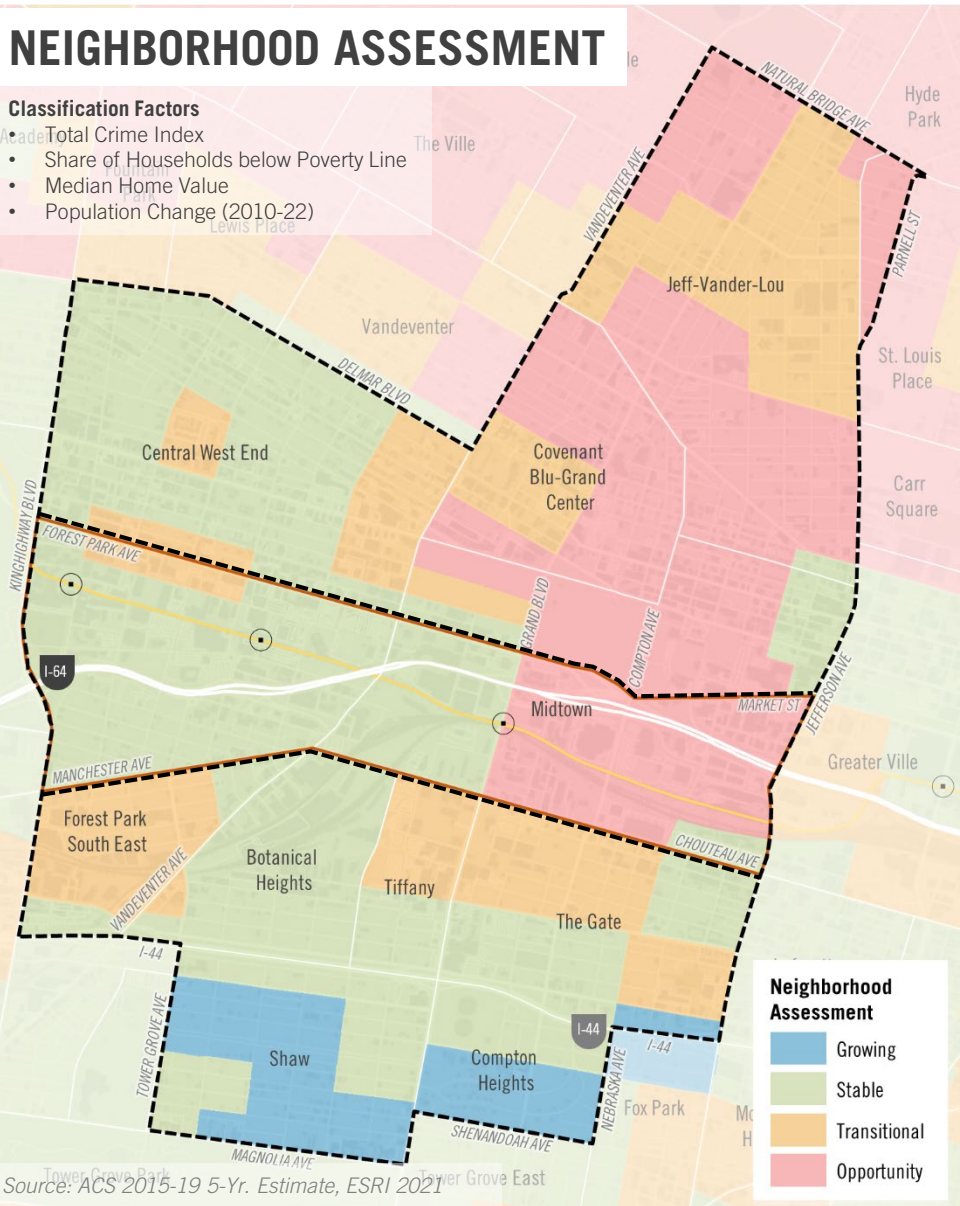
Source: ACS 2015-19 5-Yr. Estimate, ESRI 2021

Growing: Areas that has higher than average home price appreciation and demand, with positive socioeconomic indicators.

Stable: Areas that support market-driven developments and do not show signs of widespread disinvestment.

Transitional: Areas that have started to experience market-driven reinvestment, bust still require people-based, public realm, and catalytic investments to fully stabilize.

Opportunity: Areas facing complex challenges and in need of multi-faceted stabilization efforts, including investment in infrastructure, the public realm, and reinvestment in vacant lands and buildings.

Methodology

The composite map is created from additive scores of four factors that capture quality of life, households, and recent economic prospects. The categorization is based on the following scoring results:

Median Home Value
(1) >$250K
(2) $166K to $250K
(3) $100K to $166K
(4) $50K to $100K
(5) <$50K

Total Crime Index
(1) <100
(2) 100 to 250
(3) 250 to 400
(4) >400

Population Change (2010-22)
(1) Gain of >100
(2) Gain of up to 100
(3) Loss of up to 50
(4) Loss of >50 but <140
(5) Loss of >140

Household Share below Poverty Line
(1) <10%
(2) 10% to 20%
(3) 20% to 30%
(4) >30%

Category	Overall Score
Growing	4 to 6
Stable	7 to 10
Transitional	11 to 13
Opportunity	14 to 17

Generally, the areas to the west, northwest, and southwest are stable with Forest Park Southeast and portions of Central West end are transitional. The areas to the east and northeast are considered opportunity areas and in need of reinvestment.
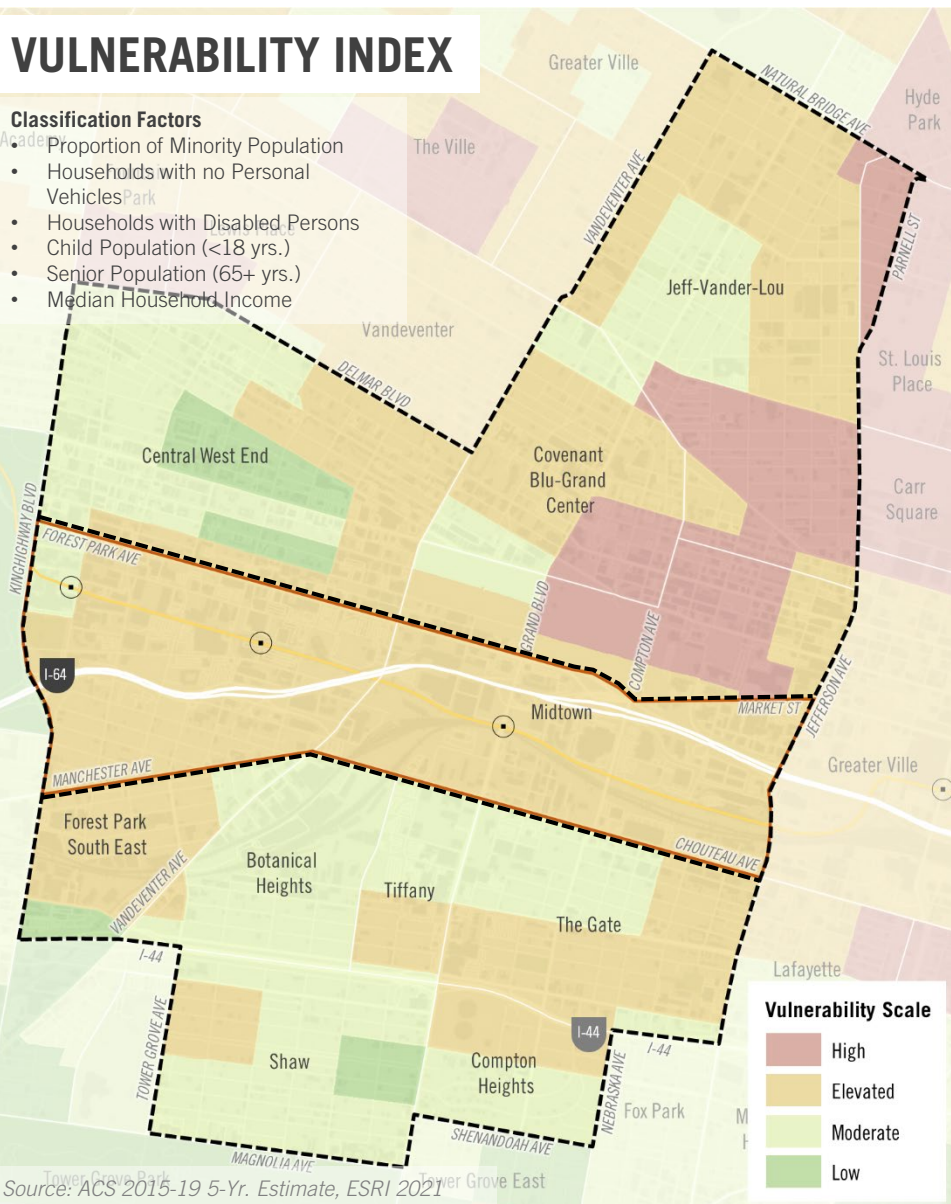
TRANSPORTATION EQUITY
COMPOSITE INDICATORS: VULNERABILITY INDEX

VULNERABILITY INDEX

Classification Factors
- Proportion of Minority Population
- Households with no Personal Vehicles
- Households with Disabled Persons
- Child Population (<18 yrs.)
- Senior Population (65+ yrs.)
- Median Household Income

Vulnerability Scale
- High
- Elevated
- Moderate
- Low

Source: ACS 2015-19 5-Yr. Estimate, ESRI 2021

Vulnerability Index

The composite map is created from additive scores of six factors that capture populations that have historically been under-represented in transportation investments, or have higher dependence on public investments in transportation because of their income, age or disability.

The categorization is based on the following scoring results:

Share of Minority Population
(1)   <20%
(2)   20% to 40%
(3)   40% to 60%
(4)   >60%

Number of Households with no Personal Vehicles
(1)   <50 Households
(2)   50 to 100 Households
(3)   100 to 200 Households
(4)   >200 Households

Median Household Income
(1)   >$80K
(2) $45K to $80K
(3) $30K to $45K
(4)   <$30K

Number of Households with at least one Disabled Person
(1)   <50 Households
(2)   50 to 100 Households
(3)   100 to 200 Households
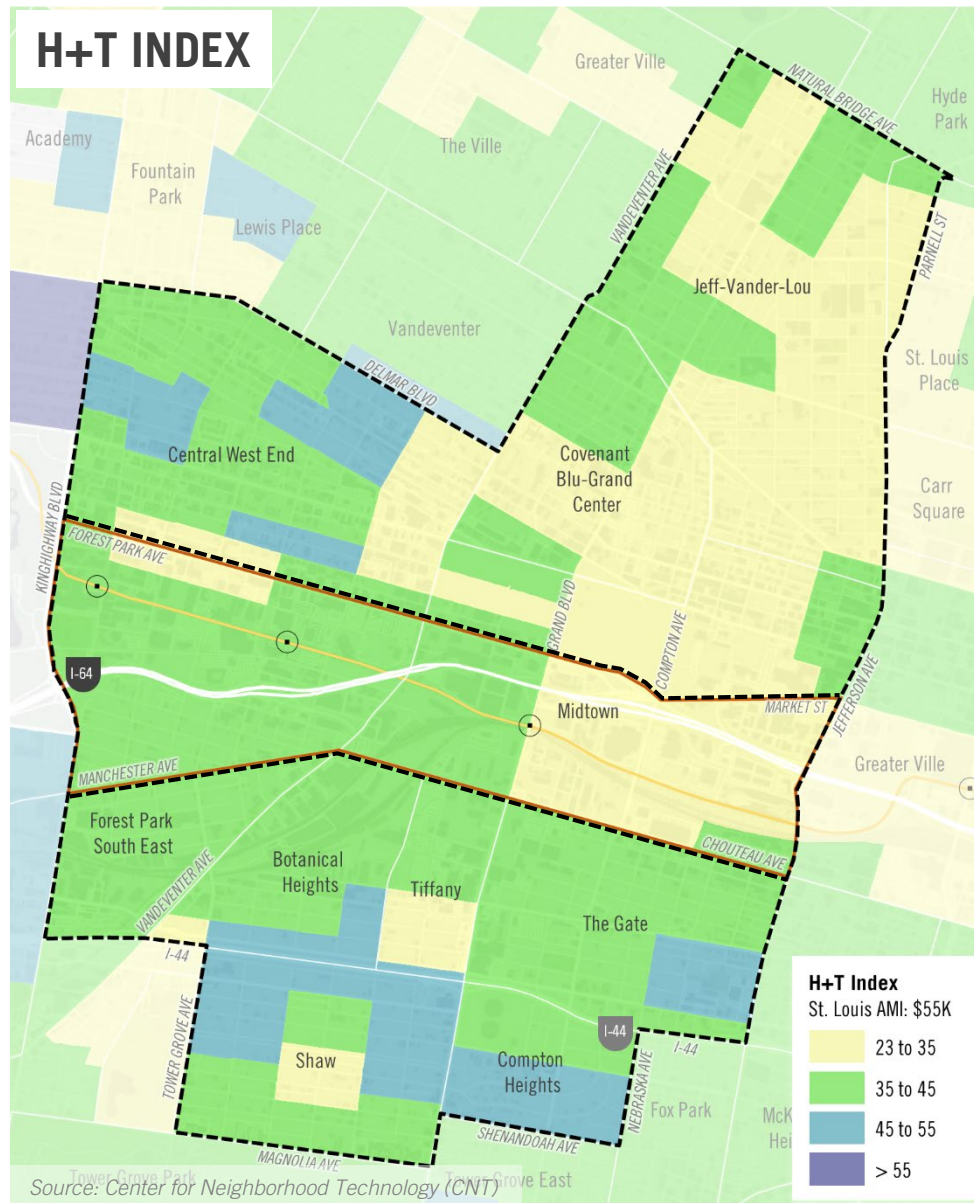(4)   >200 Households

Senior Population Count
(1)   <50
(2)   50 to 100
(3)   100 to 200
(4)   >200

Child Population Count
(1)   <50
(2)   50 to 100
(3)   100 to 200
(4)   >200

Scale	Overall Score
High	21 to 24
Elevated	16 to 20
Moderate	12 to 15
Low	8 to 11

Given socio-economic conditions around Covenant Blu-Grand Center and continued development pressures, the area has elevated to high vulnerability indices.

TRANSPORTATION EQUITY
HOUSING AND TRANSPORTATION (H+T) AFFORDABILITY INDEX

H+T INDEX

H+T Index
St. Louis AMI: $55K

- 23 to 35
- 35 to 45
- 45 to 55
- > 55

Source: Center for Neighborhood Technology (CNT)

The Center for Neighborhood Technology's Housing and Transportation (H+T) Affordability Index provides a more comprehensive way of thinking about the true affordability of place - offering an expanded view of affordability, one that combines housing and transportation costs and sets the benchmark at no more than **45%** of household income.

Methodology

The Total Transportation Cost is arrived at by using key Neighborhood and Household Characteristics, combined with auto ownership, and auto and public transit usage data for the 2015 ACS and 2014 Longitudinal Employer-Household Dynamics Data. Metrics used:

Neighborhood Characteristics
- Gross Density
- Regional Household Intensity
- Fraction of Single-Family Detached Housing
- Block Density
- Employment Access Index
- Employment Mic Index
- Transit Connectivity index
- Transit Access Shed & Jobs
- Average Available Transit Trips per Week

Household Characteristics
- Median Household Income
- Average Commuters per Household
- Average Household Size

Given higher housing costs and population density in Central West End and neighborhoods south of the Tier 2 Study Area, there is a higher number of cost-burdened households in these areas compared to the areas around Covenant Blu Grand Center and Jeff-Vander-Lou.

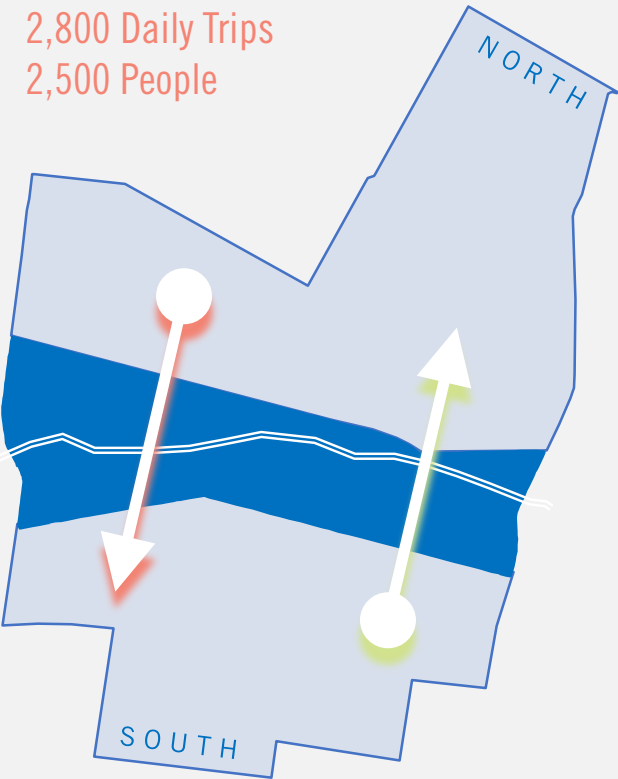# North - South
Travel Patterns

TRAVEL PATTERNS
NORTH – SOUTH TRIPS ON A TYPICAL WEEKDAY

NORTH – SOUTH TRIPS
TYPICAL WEEKDAY

CA NORTH -> CA SOUTH
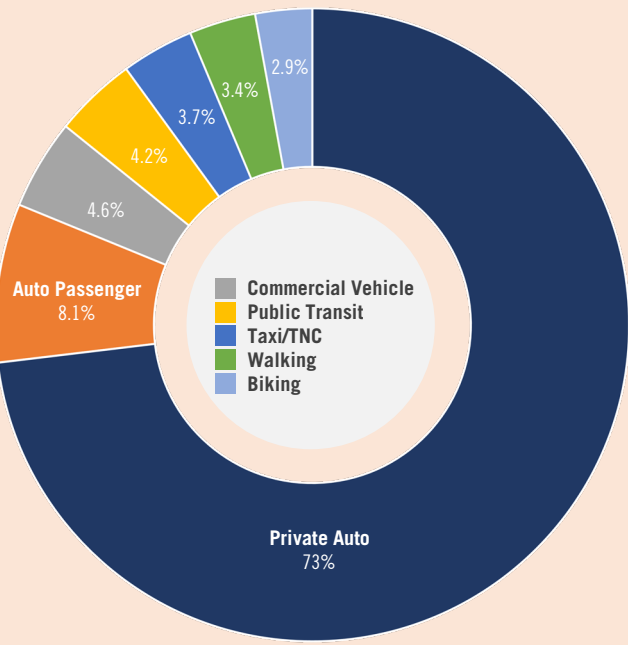2,800 Daily Trips
2,500 People

NORTH

SOUTH
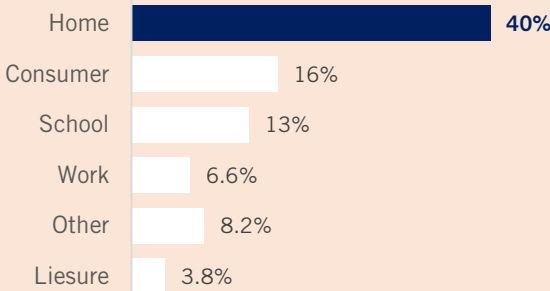
CA SOUTH -> CA NORTH
2,900 Daily Trips
2,600 People
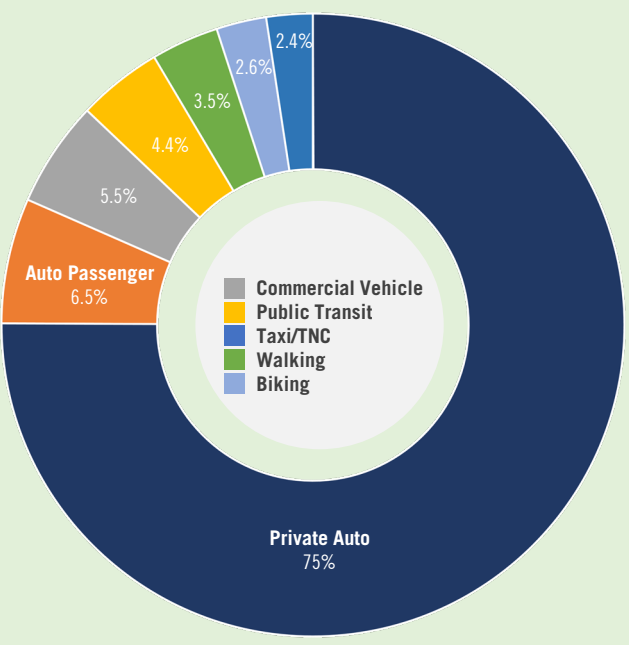
CA NORTH -> CA SOUTH

Travel Mode

- 2.9%
- 3.4%
- 3.7%
- 4.2%
- 4.6%
- Auto Passenger 8.1%
- Private Auto 73%

Legend:
- Commercial Vehicle
- Public Transit
- Taxi/TNC
- Walking
- Biking

Trip Purpose

Purpose	Percent
Home	**40%**
Consumer	16%
School	13%
Work	6.6%
Other	8.2%
Liesure	3.8%

CA SOUTH -> CA NORTH

Travel Mode

- 2.4%
- 2.6%
- 3.5%
- 4.4%
- 5.5%
- Auto Passenger 6.5%
- Private Auto 75%

Legend:
- Commercial Vehicle
- Public Transit
- Taxi/TNC
- Walking
- Biking

Trip Purpose

Purpose	Percent
Home	**32%**
Work	26%
Consumer	17%
School	13.6%
Other	7.7%
Liesure	4.1%
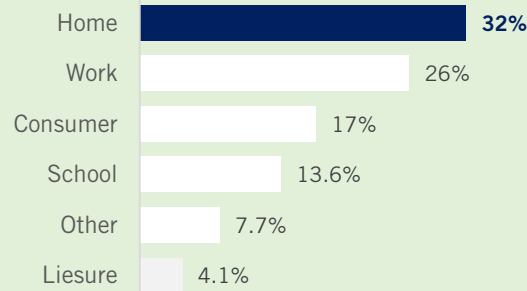
On a typical weekday, trips between the north and south neighborhoods are dominated by private auto, and biking and walking combine for just over 6 percent of the trips.
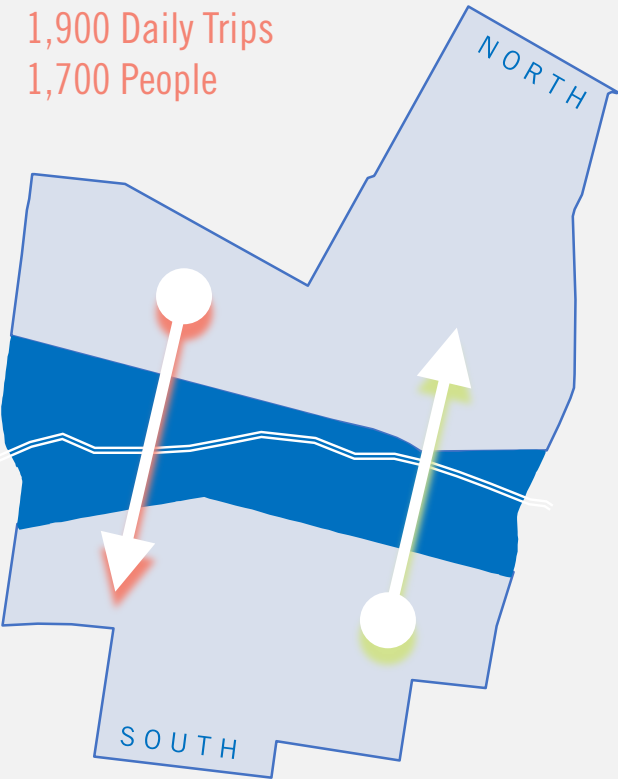
TRAVEL PATTERNS

NORTH – SOUTH TRIPS ON A TYPICAL WEEKEND

NORTH – SOUTH TRIPS
TYPICAL WEEKEND

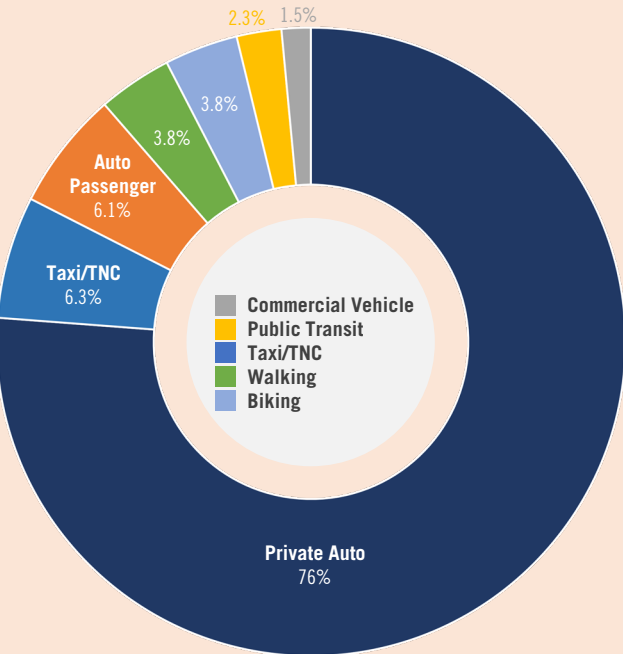**CA NORTH -> CA SOUTH**
1,900 Daily Trips
1,700 People

NORTH

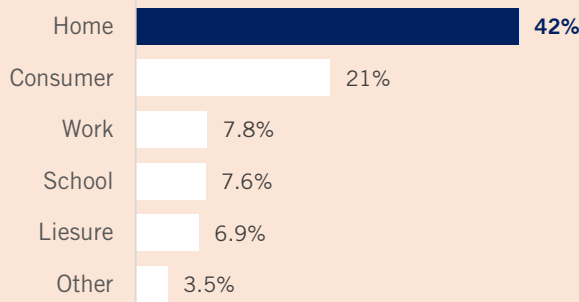SOUTH

CA SOUTH -> CA NORTH
1,900 Daily Trips
1,700 People
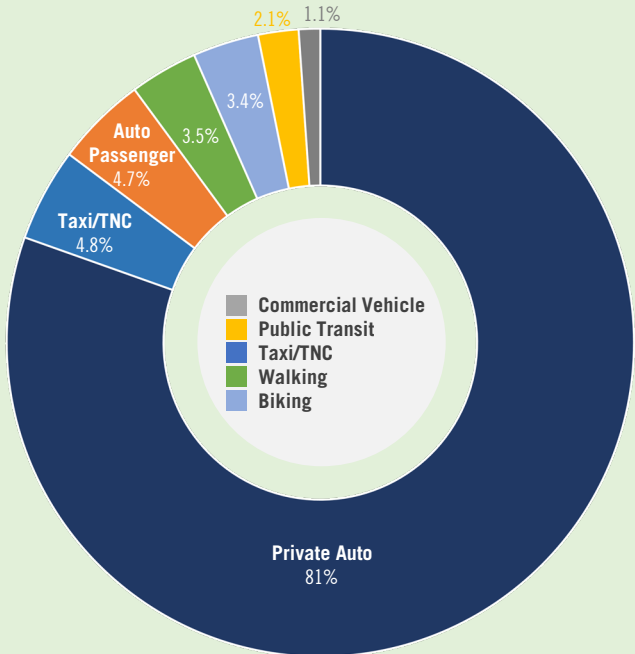
CA NORTH -> CA SOUTH

Travel Mode

2.3%   1.5%
3.8%
3.8%
Auto Passenger 6.1%
Taxi/TNC 6.3%

Commercial Vehicle
Public Transit
Taxi/TNC
Walking
Biking

Private Auto
76%

Trip Purpose

Home	**42%**
Consumer	21%
Work	7.8%
School	7.6%
Liesure	6.9%
Other	3.5%

CA SOUTH -> CA NORTH

Travel Mode

2.1%   1.1%
3.4%
3.5%
Auto Passenger 4.7%
Taxi/TNC 4.8%

Commercial Vehicle
Public Transit
Taxi/TNC
Walking
Biking

Private Auto
81%

Trip Purpose

Home	**36%**
Consumer	30%
Work	14%
Liesure	8.8%
School	7.0%
Other	4.2%
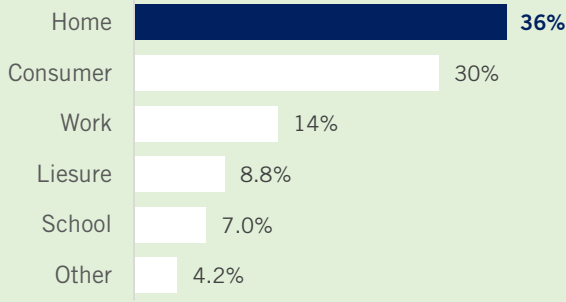
While private auto trips still dominate for a typical weekend day, and actually increase in their share of trips, the share of biking and walking trips also increases slightly to just over 7 percent.