

I-64 PEL Study

COMMUNITY ASSESSMENT BASELINE

Economic and Market Scan, People & Neighborhood Assessment

May 2022



Contents

Community Assessment Framework

03

Introduction to Study Area

05

Market & Economy

09

People & Neighborhoods

37

An aerial photograph of a city grid, likely Chicago, with a blue overlay. Four horizontal bars are positioned on the left side, each containing a title. The top bar is dark blue with white text. The other three bars are light blue with dark blue text. The background shows a dense urban landscape with streets, buildings, and some green spaces.

Community Assessment Framework

Introduction to Study Area

Market & Economy

People & Neighborhoods

COMMUNITY ASSESSMENT FRAMEWORK

ANALYSIS APPROACH

Economy & Market

Regional and Local Economic Trends
Industry Clusters
Jobs & Wages
Real Estate Market Trends
Economic Development
Economic Competitiveness

People & Neighborhoods

Population & Household Trends
Demographic Overview
Housing Trends & Affordability
Transportation Equity

- Neighborhood Assessment
- Vulnerable Populations

An aerial photograph of a city grid, likely Chicago, with a blue color overlay. The image shows a dense network of streets, buildings, and some green spaces. Overlaid on the image are four horizontal bars with white text, each with a dark blue end. The text reads: 'Community Assessment Framework', 'Introduction to Study Area', 'Market & Economy', and 'People & Neighborhoods'.

Community Assessment Framework

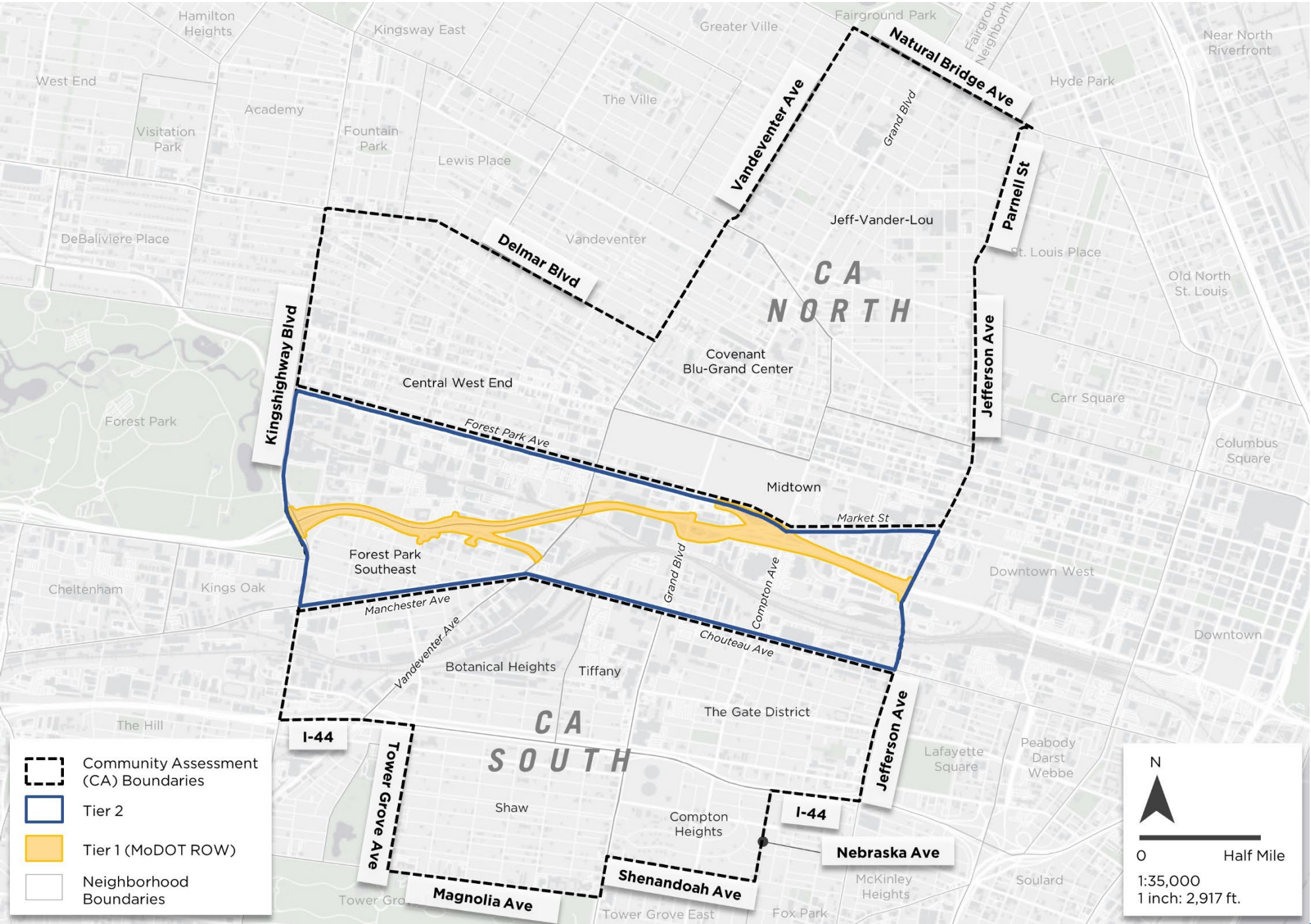
Introduction to Study Area

Market & Economy

People & Neighborhoods

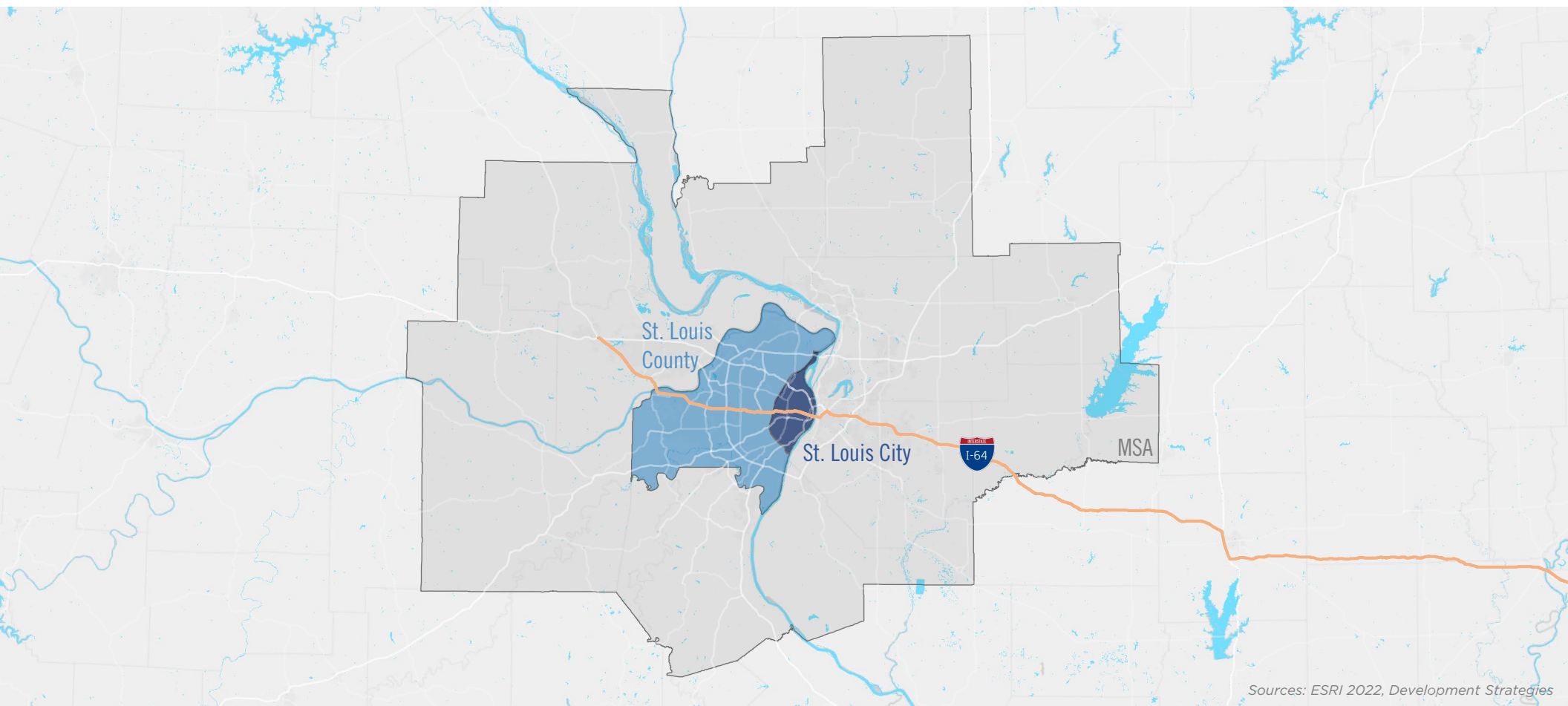
INTRODUCTION TO STUDY AREA

STUDY AREA BOUNDARIES



INTRODUCTION TO STUDY AREA

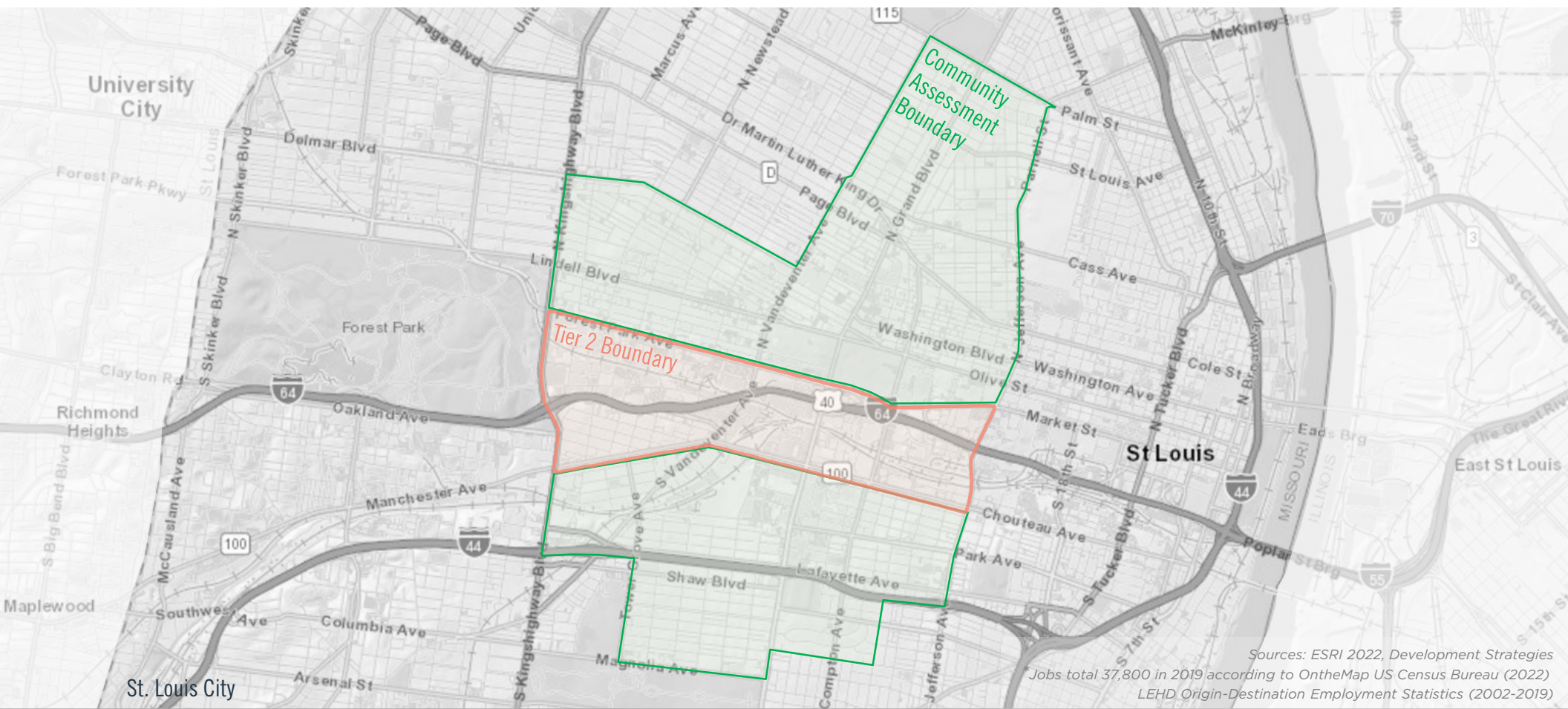
KEY METRICS – REGION, ADJOINING COUNTY, CITY



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



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

An aerial photograph of a city grid, likely Chicago, with a blue color overlay. The image shows a dense network of streets, buildings, and some green spaces. Overlaid on the image are four horizontal bars with text, each having a white background and a dark blue border on the right side.

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

1.20



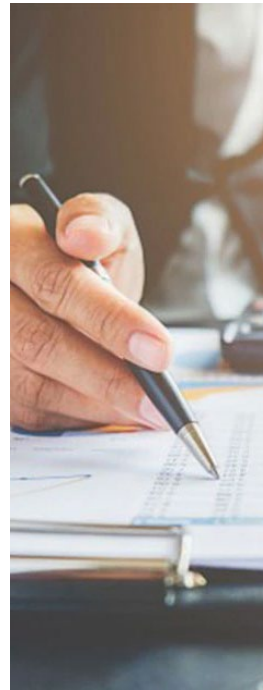
Manufacturing

1.18



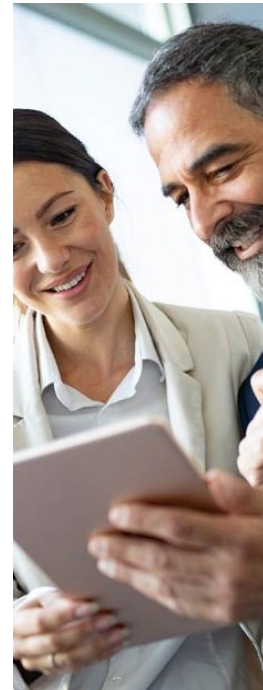
Arts,
Entertainment,
& Recreation

1.13



Finance &
Insurance

1.10



Management of
Companies

1.10



Healthcare &
Social
Assistance

1.05



Educational
Services

1.02

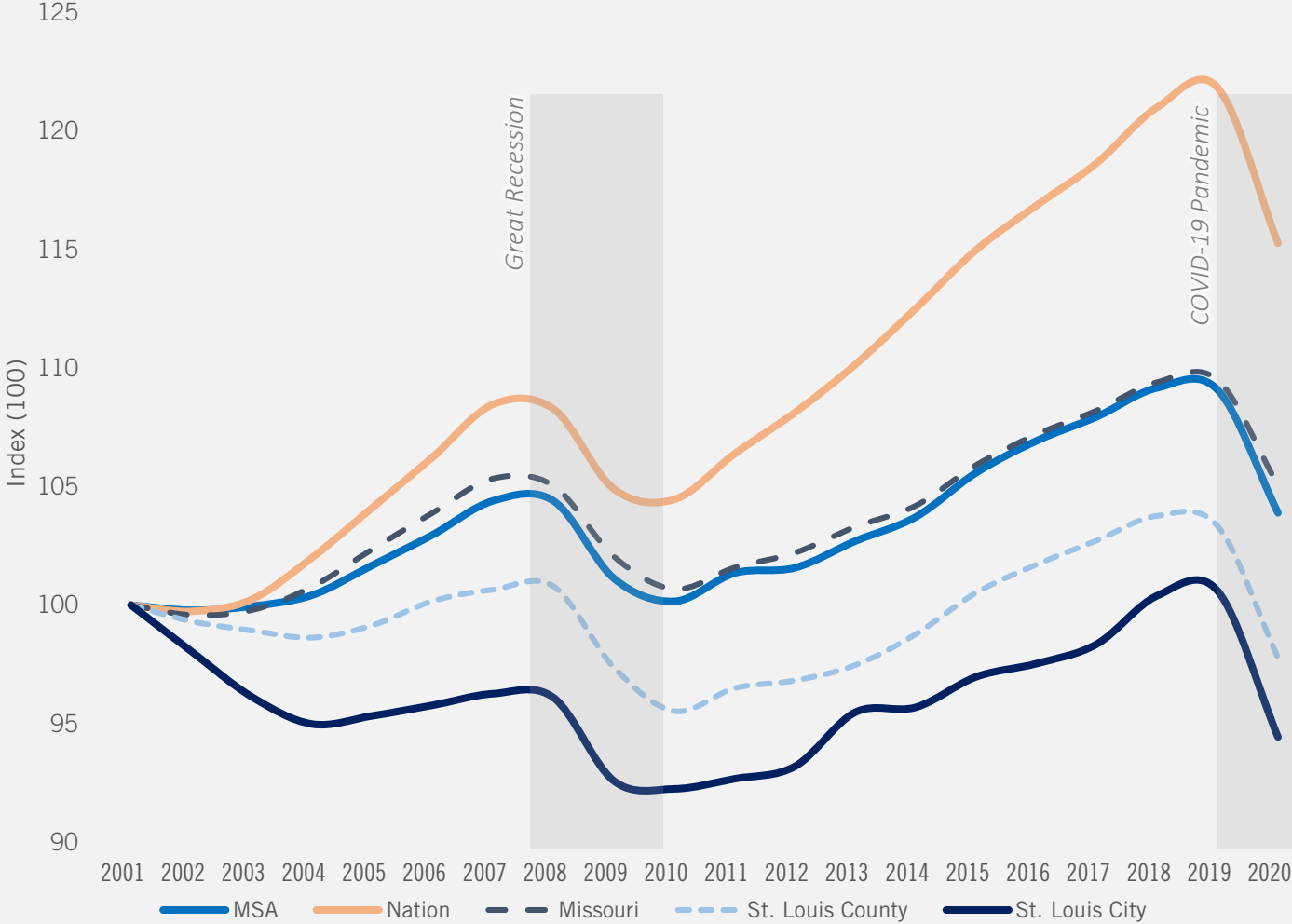
Based on location quotient, the St. Louis regional economy is **well-diversified with no significant concentrations** (or deficiencies) in employment by sector. The sectors with the highest relative concentrations of employment compares to the national average are Transportation and Warehousing and Manufacturing. 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%

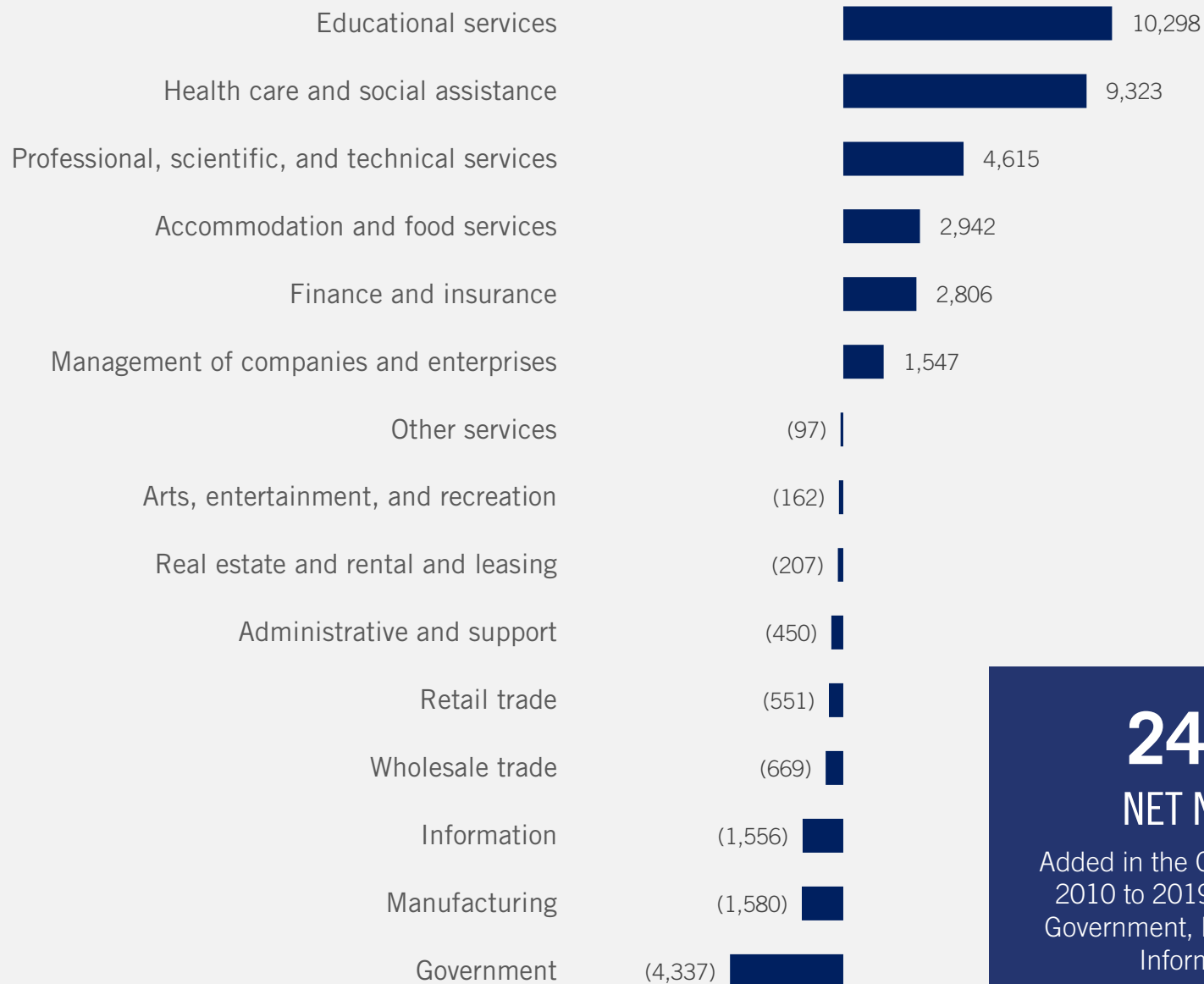
REGIONAL ECONOMY

EMPLOYMENT TRENDS BY SECTOR – CITY OF ST. LOUIS

Change in Employment, 2010-2019

City of St. Louis

Source: BEA



24,000
NET NEW JOBS

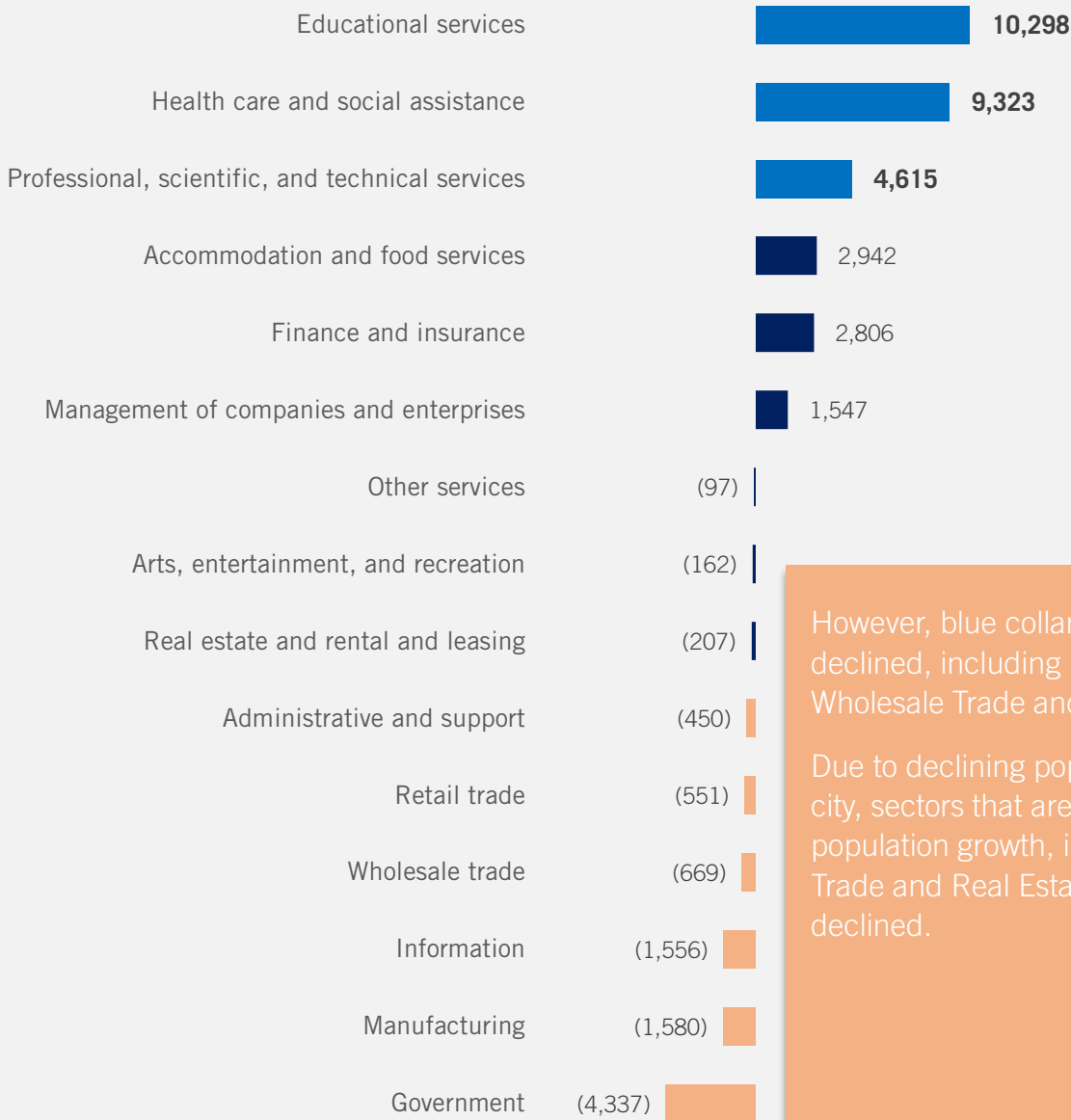
Added in the City of St. Louis from
2010 to 2019, despite losses of
Government, Manufacturing, and
Information jobs.

REGIONAL ECONOMY

EMPLOYMENT TRENDS BY SECTOR – CITY OF ST. LOUIS

Change in Employment, 2010-2019

City of St. Louis
Source: BEA



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

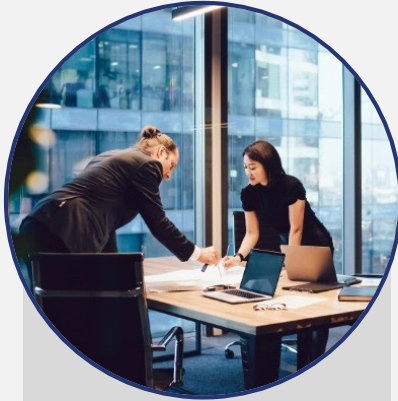
Professional & Technical Services
26% City | 23% National

Healthcare Services
21% City | 21% National

REGIONAL ECONOMY

REGIONAL GROWTH CLUSTERS

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.



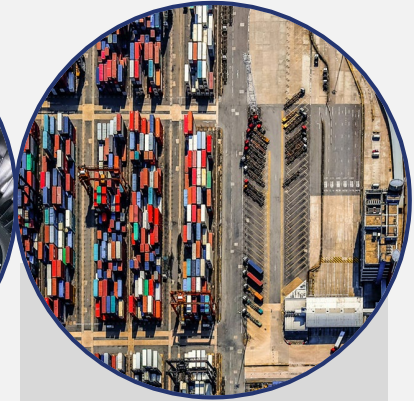
ADVANCED MANUFACTURING & PRODUCTION

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

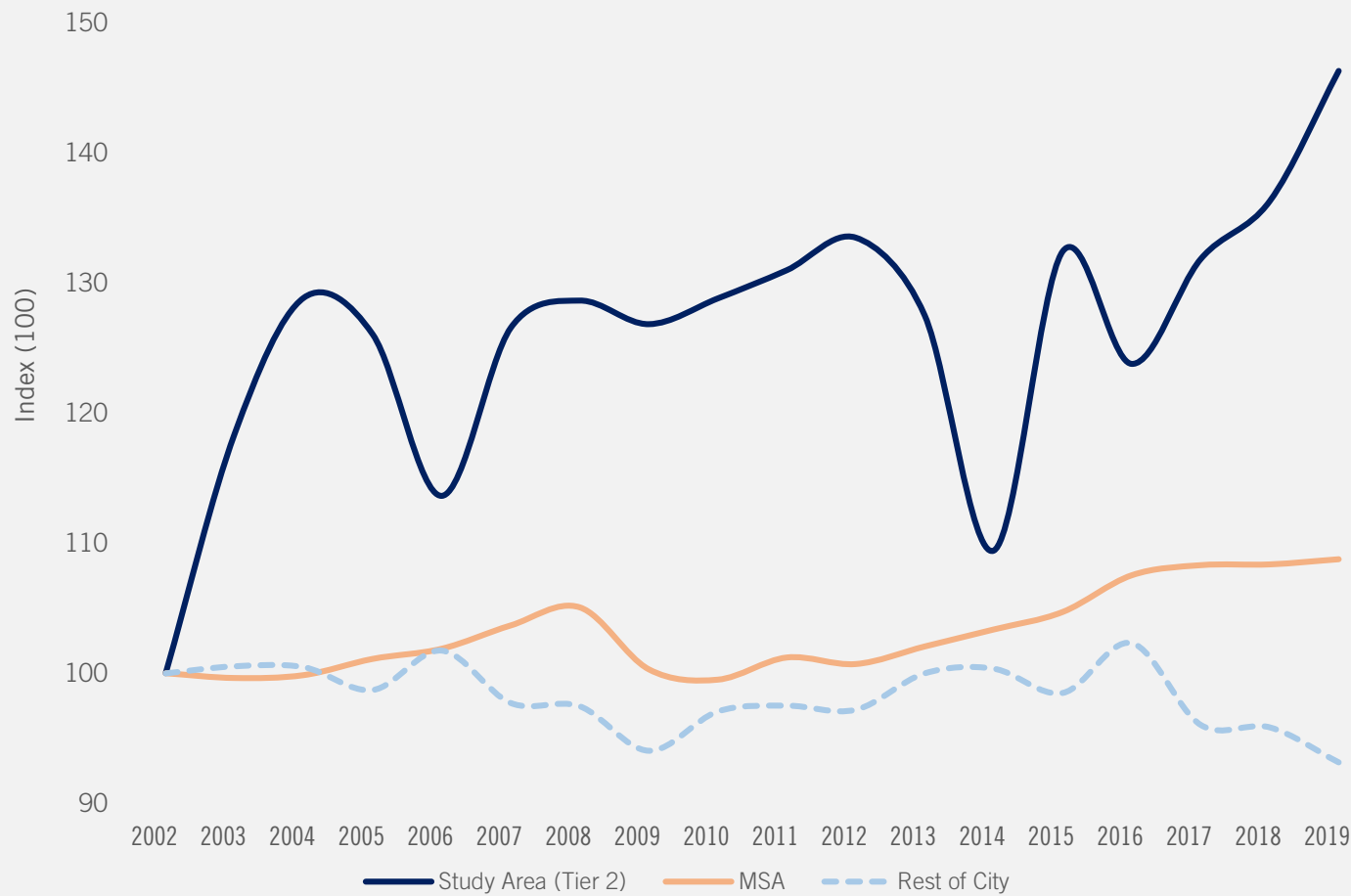
People & Neighborhoods

Study Area Economic Trends

STUDY AREA ECONOMIC TRENDS

EMPLOYMENT TRENDS – TIER 2 STUDY AREA

Relative Employment Change
2002-2019
Source: OnTheMap



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.



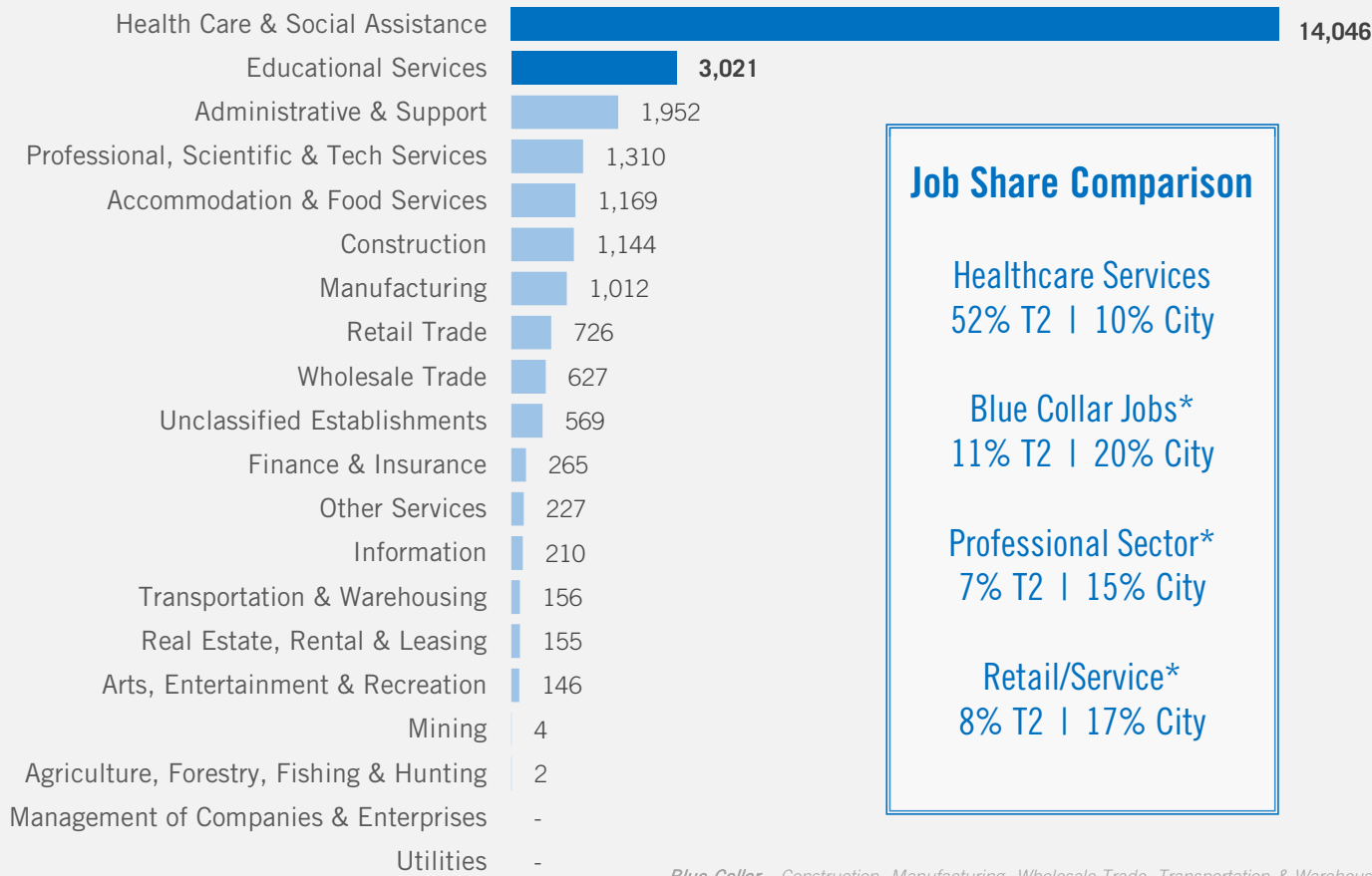
TIER 2
RELATIVE EMPLOYMENT GROWTH
2002-19 **47%**

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



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

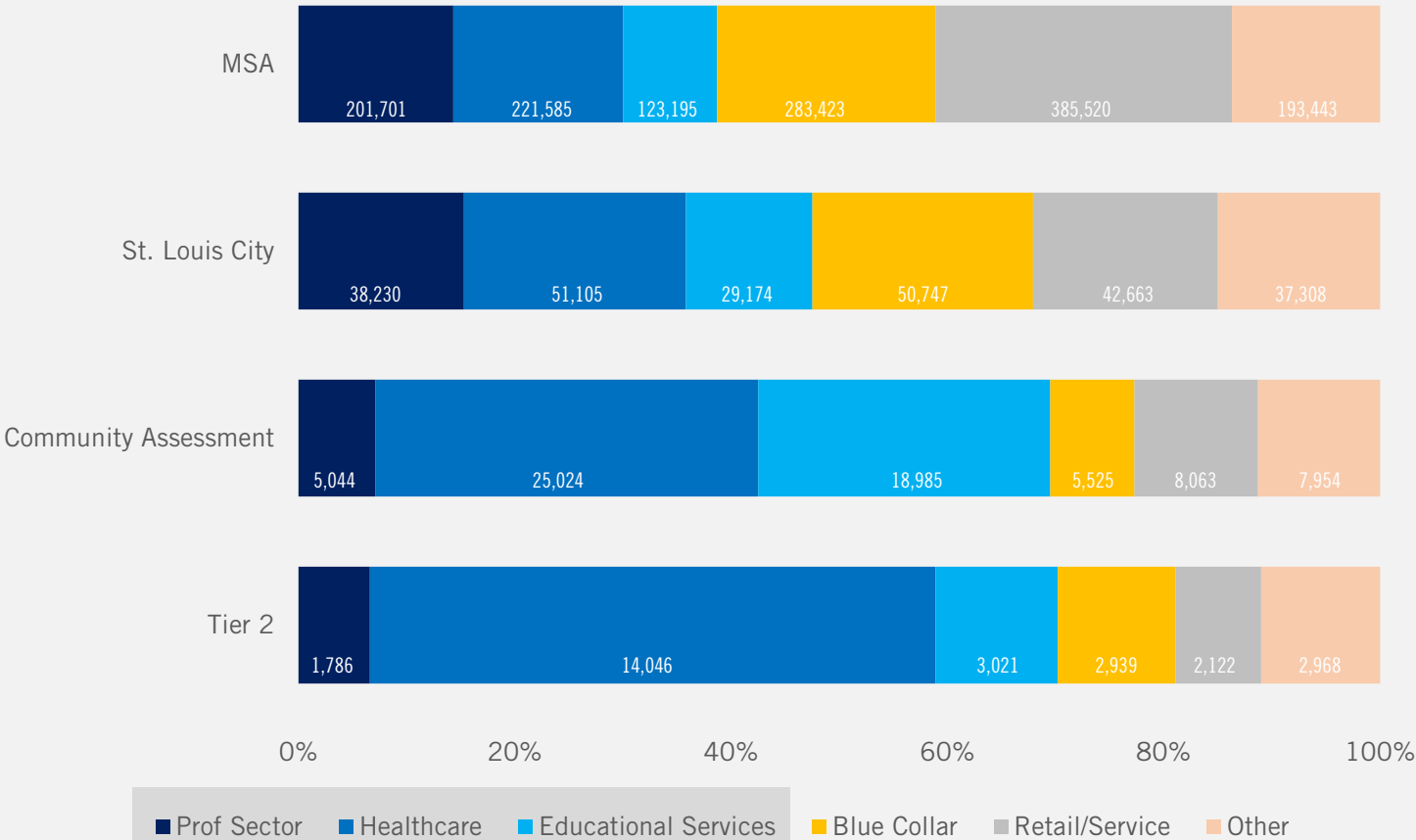
STUDY AREA ECONOMIC TRENDS

SECTOR ANALYSIS

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



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.

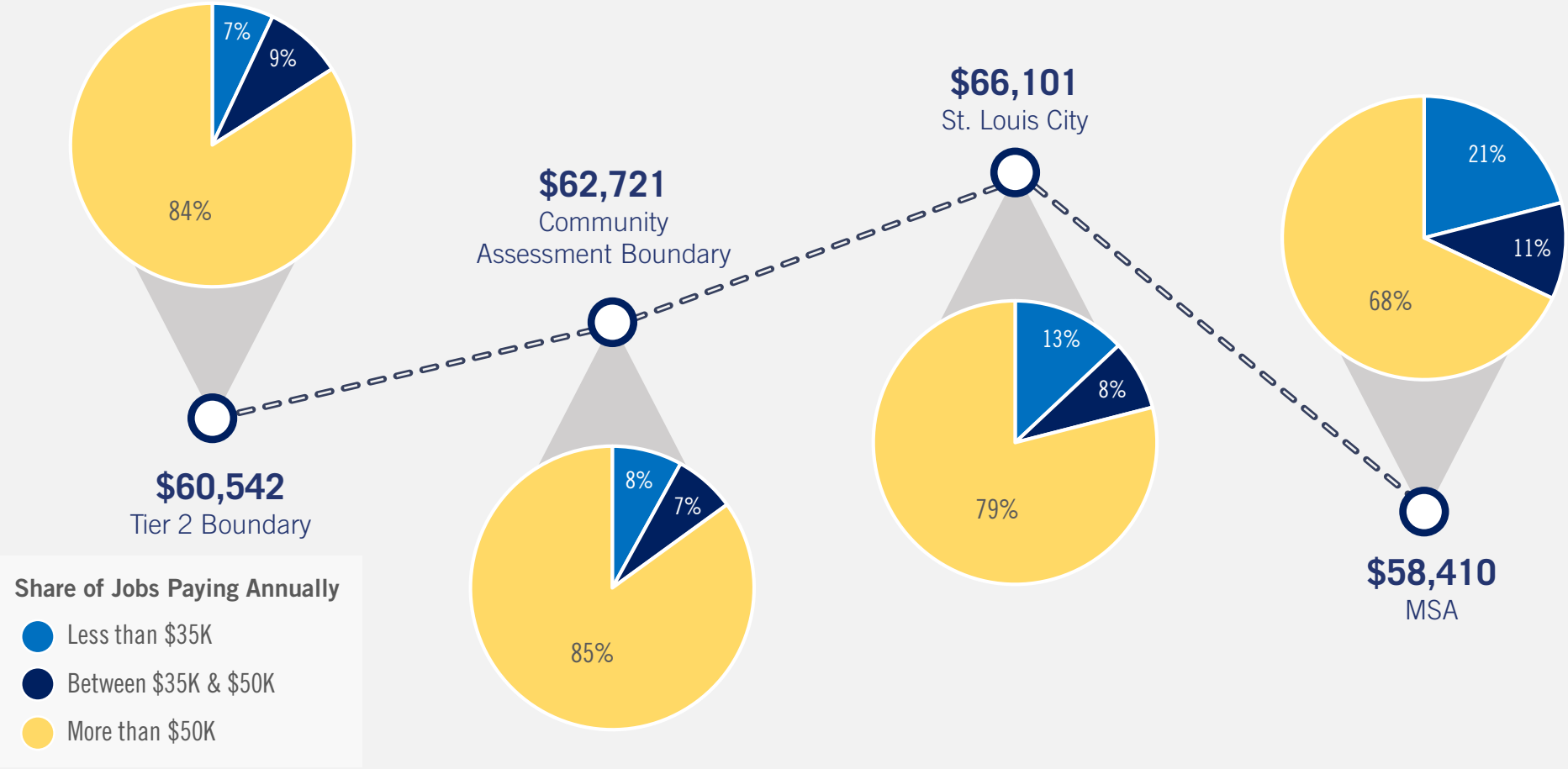
While the study area has some industrial land uses concentrated along the rail corridor, it continues to experience a shift from a Blue Collar workforce to a knowledge-based workforce. Most industrial real estate growth, especially for logistics and warehousing, has occurred in lower density areas of the region.

STUDY AREA ECONOMIC TRENDS

EMPLOYMENT BY INCOME

Average Wage

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

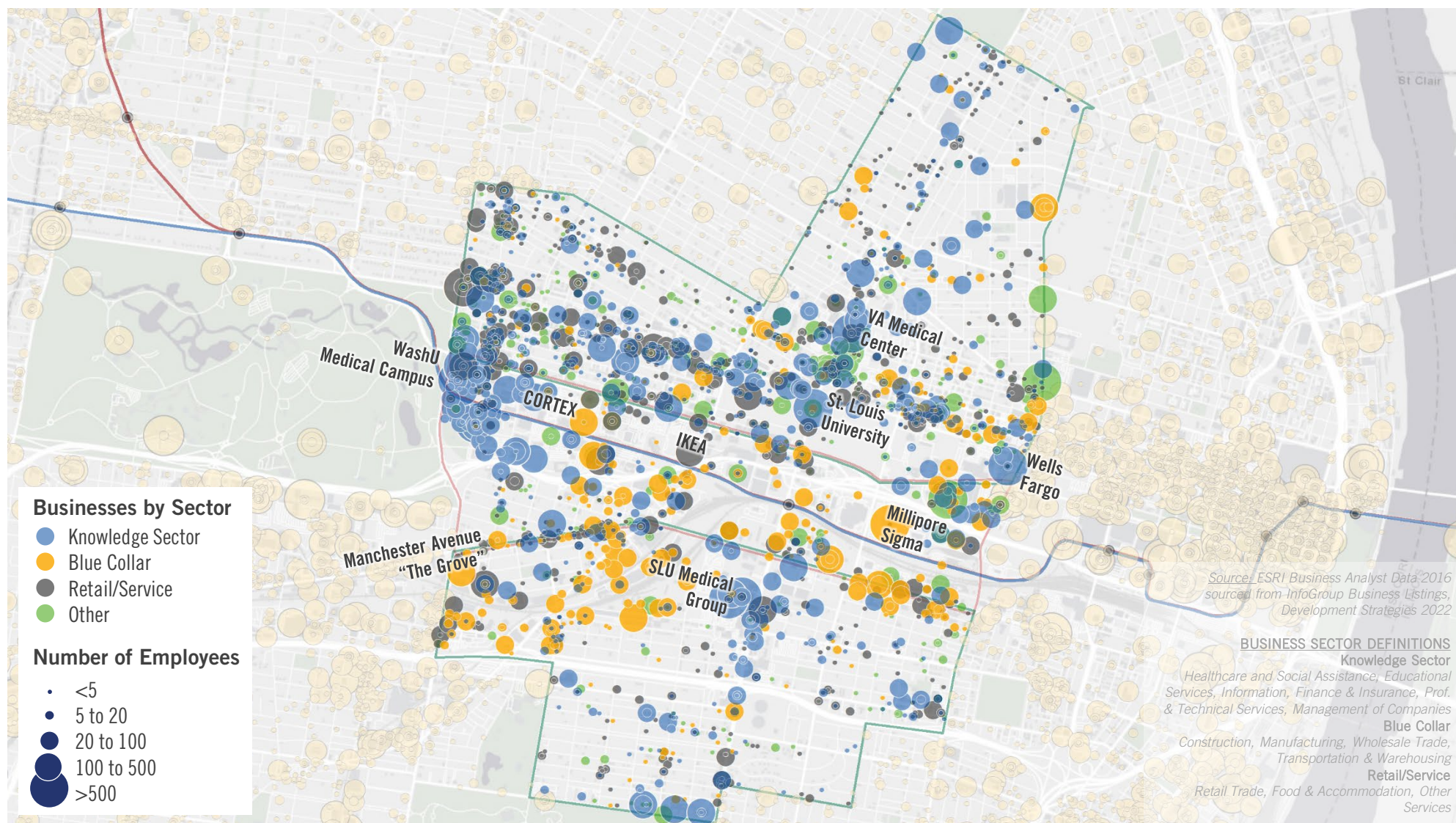


Based on distribution of employment by sector and average wages by sector, the average wage for workers in Tier 2 is just over \$60,500, which is slightly below the city average, but higher than the regional average. More importantly, there is a much higher proportion of jobs that pay more than \$50,000 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



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 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 to 14+)
\$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

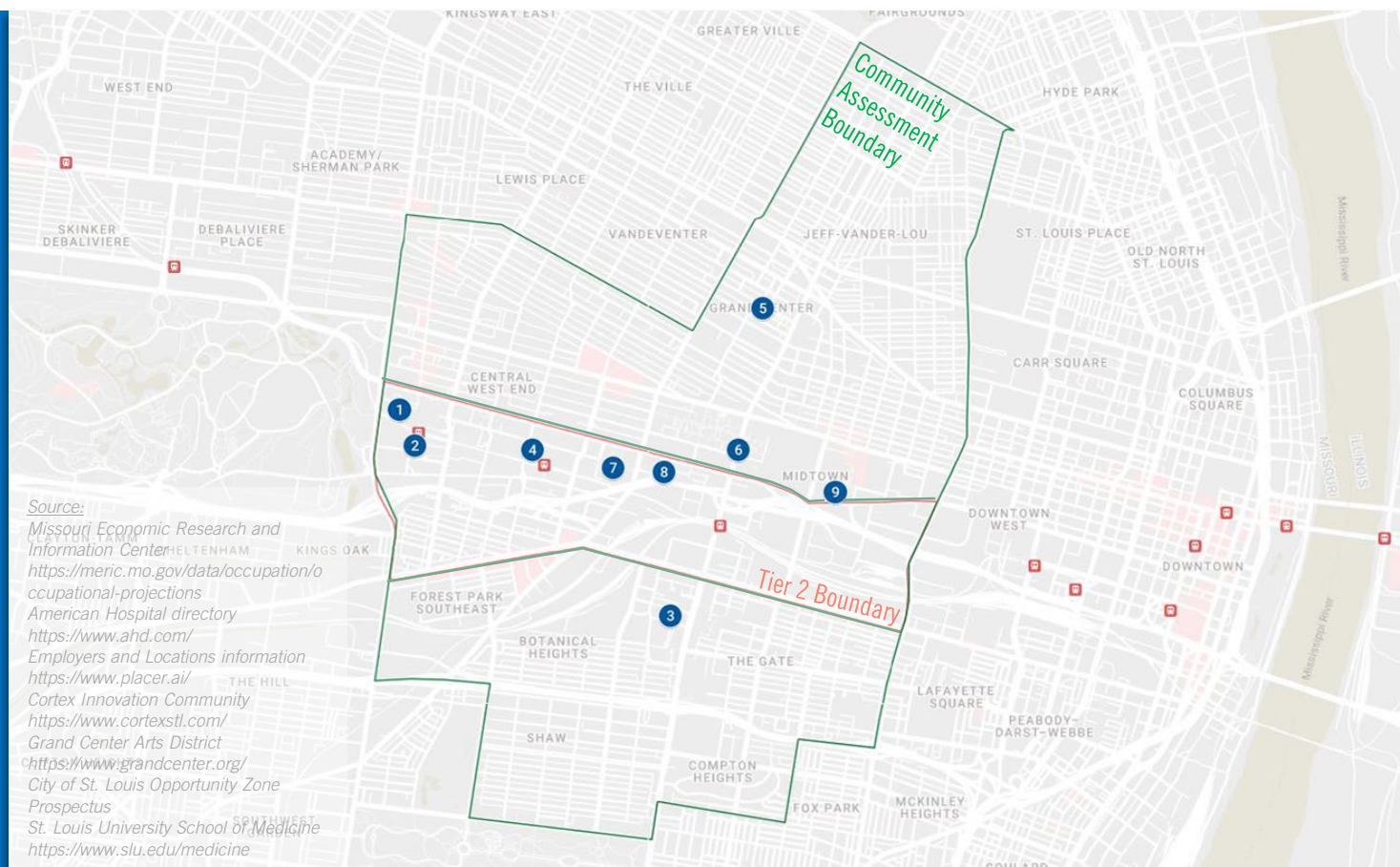
Visits: 103,700
Visitors: 94,900
Employees: 400
Store Square Footage: 380,000
Annual Revenue: \$100 million

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



STUDY AREA ECONOMIC TRENDS

COMMUTING PATTERNS

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

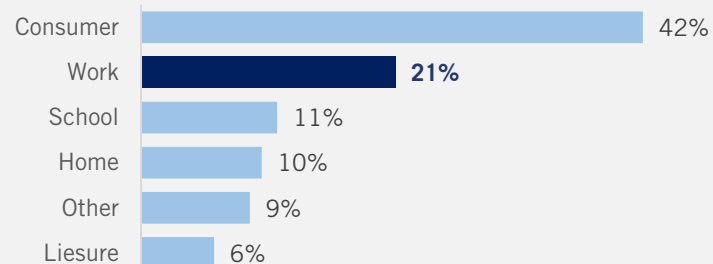
live and work within this boundary

Source:
U.S. Census Bureau,
(OntheMap) LEHD Origin-Destination Employment Statistics (2002-2019)

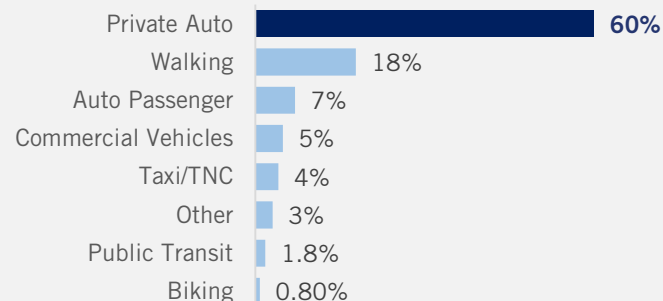
- Interstates
- Metrolink Routes
- Bus Routes

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

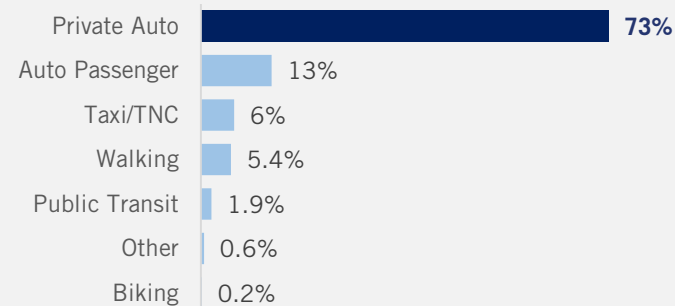
Trip Purpose



Mode Share for all Trips



Mode Share for Work Trips



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

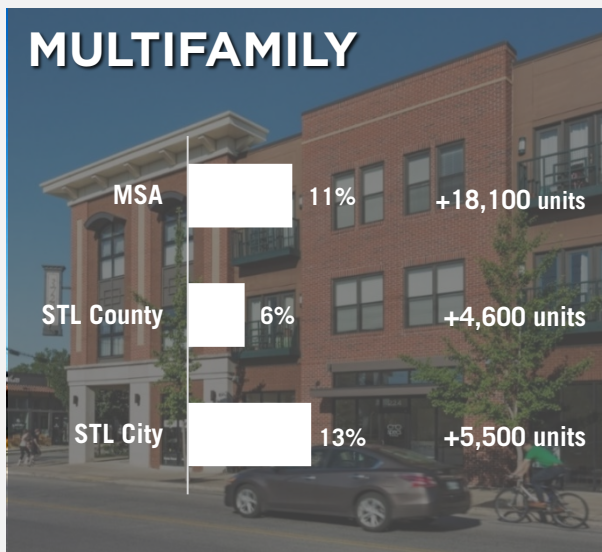
Real Estate Market Overview

REGIONAL REAL ESTATE OVERVIEW

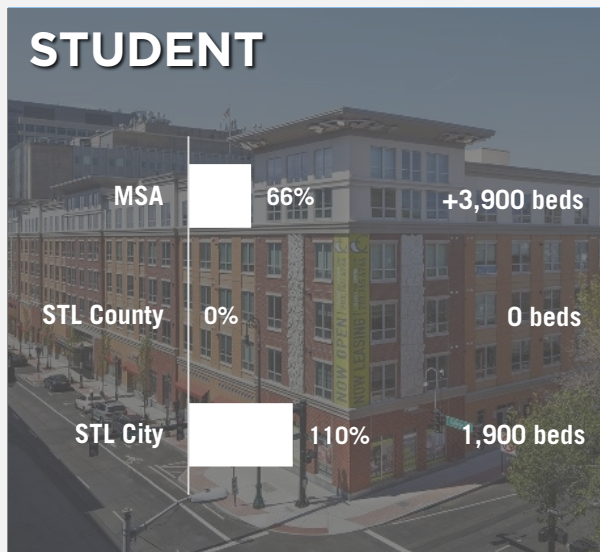
NEW DEVELOPMENT SINCE 2010

SINCE 2010

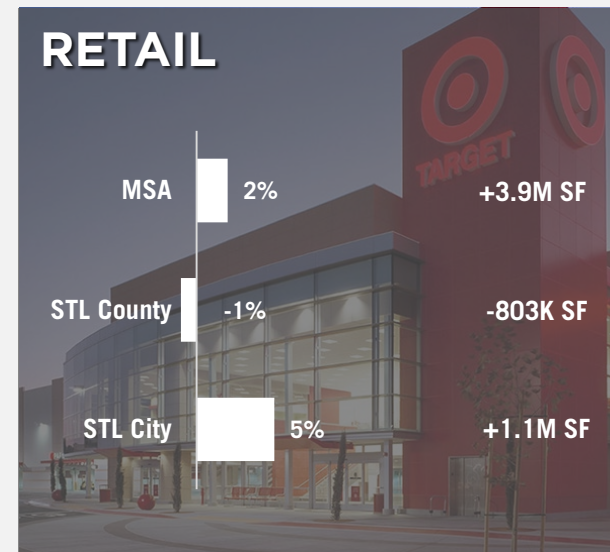
MULTIFAMILY



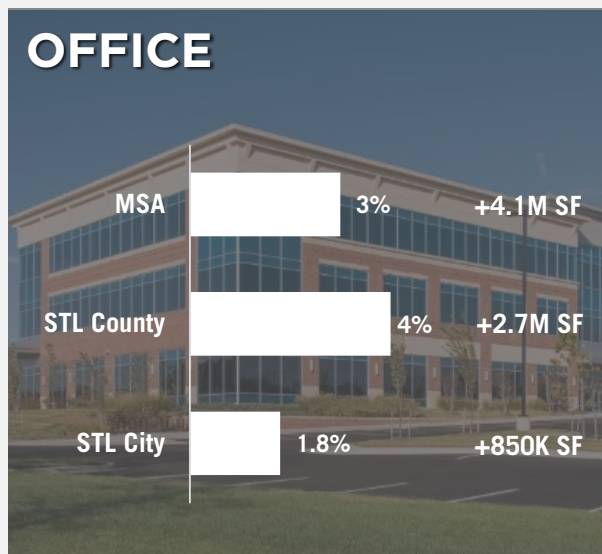
STUDENT



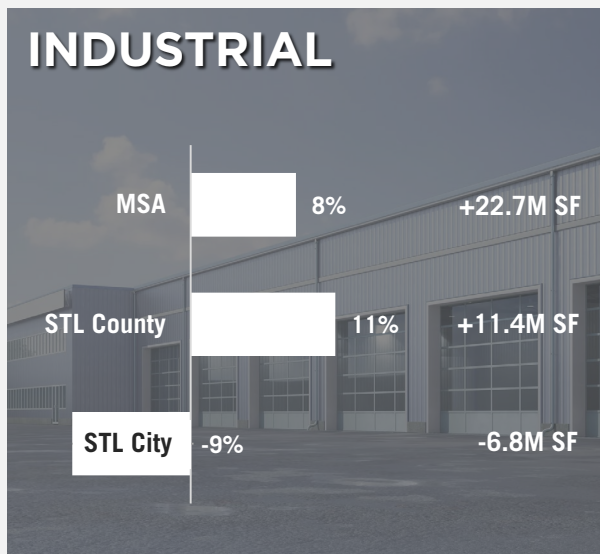
RETAIL



OFFICE



INDUSTRIAL



HOSPITALITY



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.

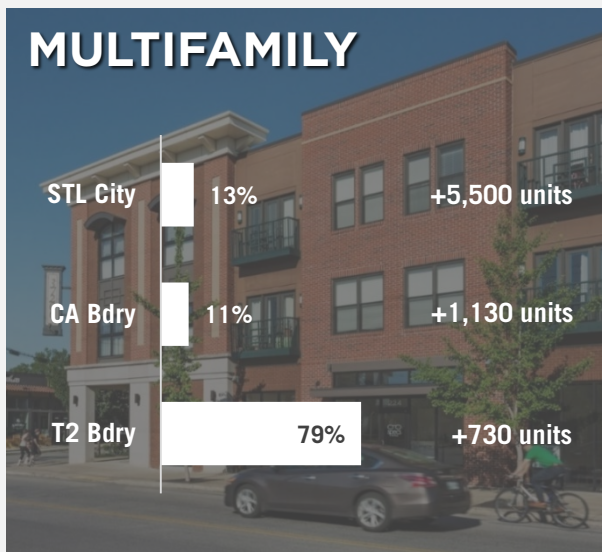
Source: CoStar 2022

LOCAL REAL ESTATE OVERVIEW

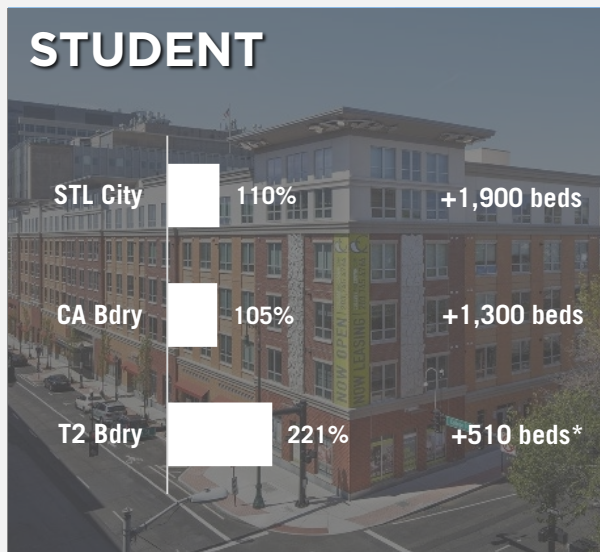
NEW DEVELOPMENT SINCE 2010: STUDY AREAS

SINCE 2010

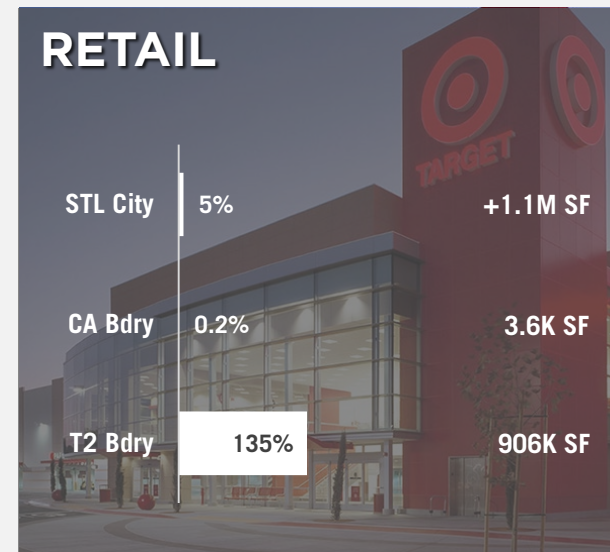
MULTIFAMILY



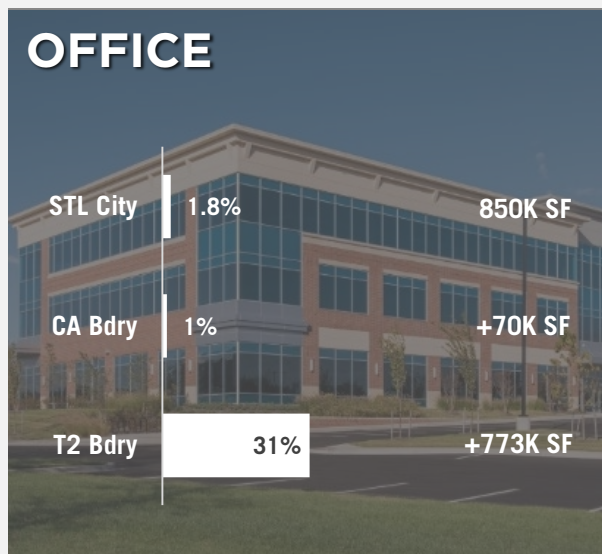
STUDENT



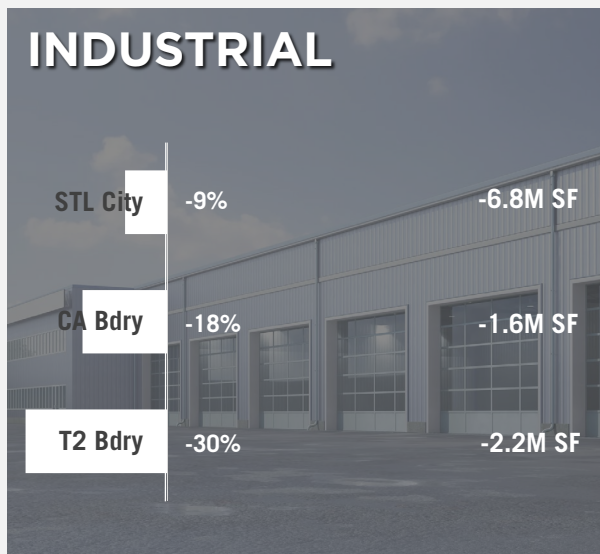
RETAIL



OFFICE



INDUSTRIAL



HOSPITALITY



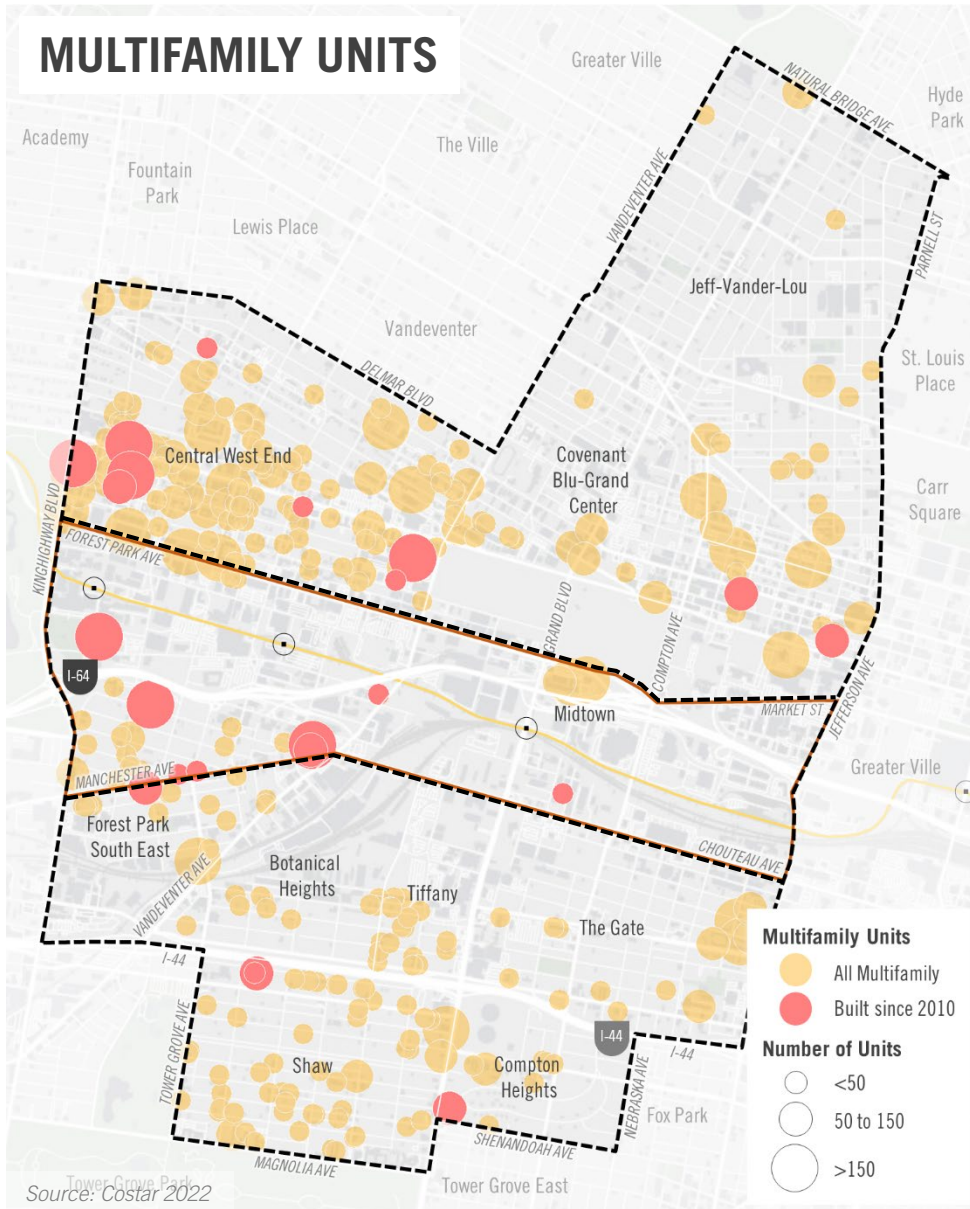
A third of the new multifamily units, 95 percent of the new student beds, and all of the new office supply added since 2010 in the city are located within the study areas. The Tier 2 Study Area delivered more than 900,000 square feet of retail (around 80 percent of the city's new retail supply), which 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

REGIONAL REAL ESTATE OVERVIEW

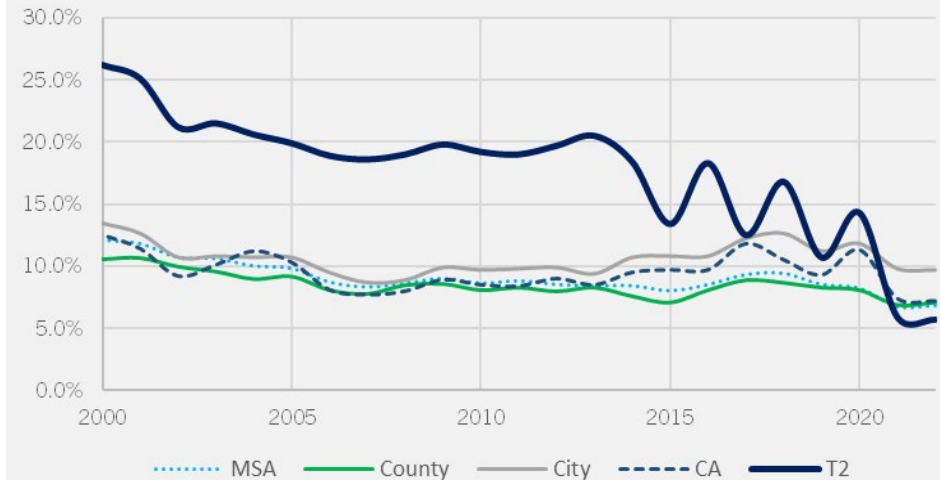
MULTIFAMILY TRENDS

MULTIFAMILY UNITS



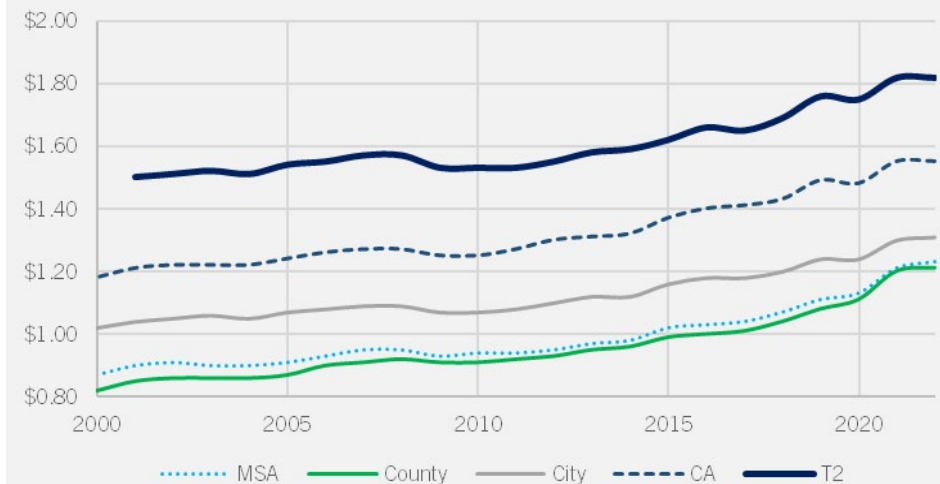
Vacancy Rate

Source: Costar



Effective Rent PSF

Source: Costar

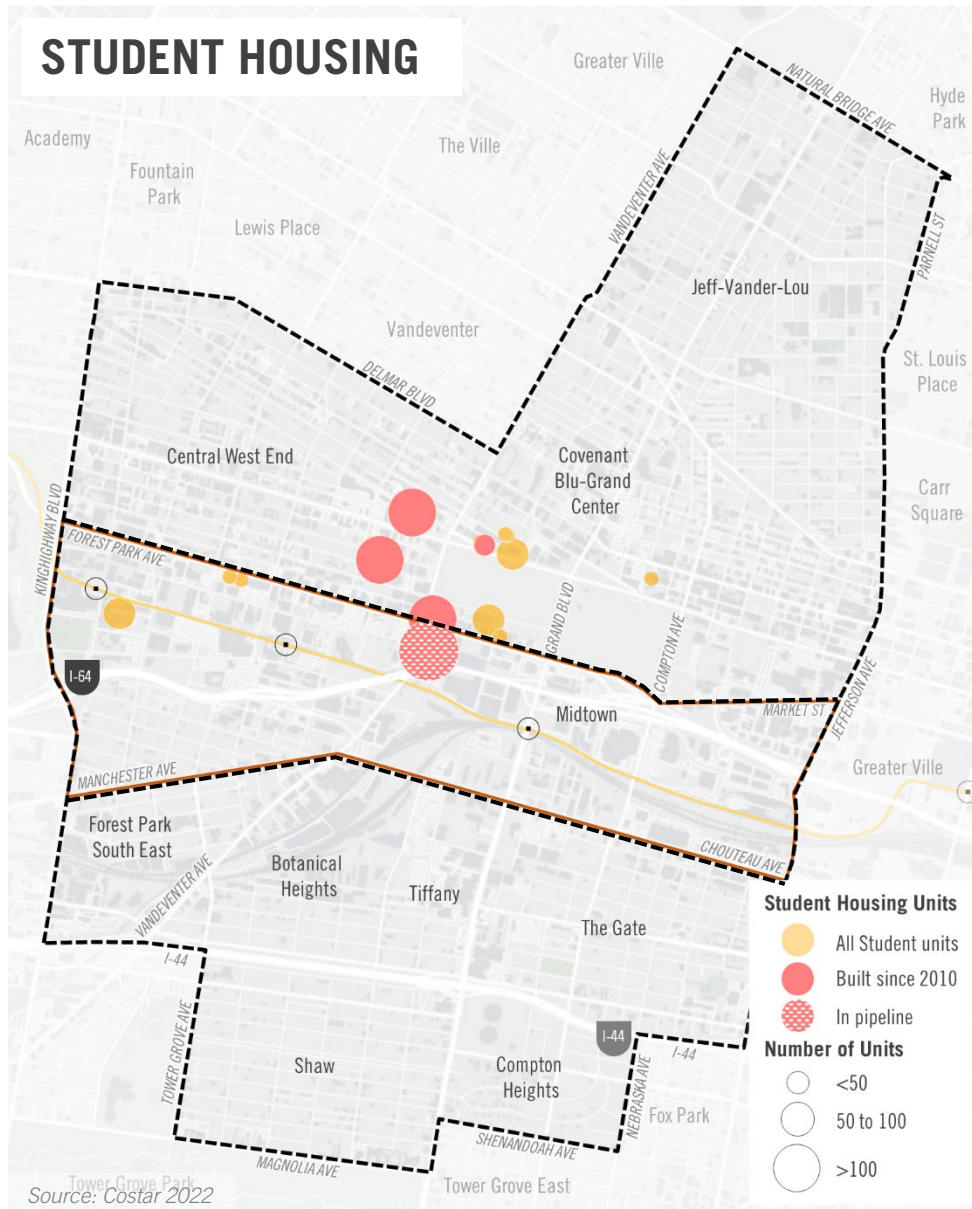


The Multifamily market is strong in the Tier 2 Study Area as demonstrated by lower vacancy rates and higher rents than the citywide averages. Vacancy in the study area has decreased significantly in the last few years as demand has increased for centralized and higher-quality housing in areas with high 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

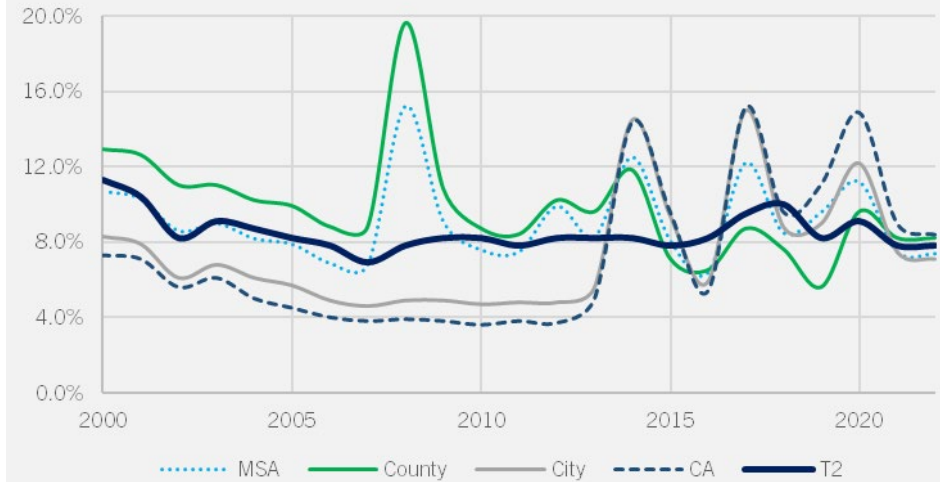
STUDENT HOUSING TRENDS

STUDENT HOUSING



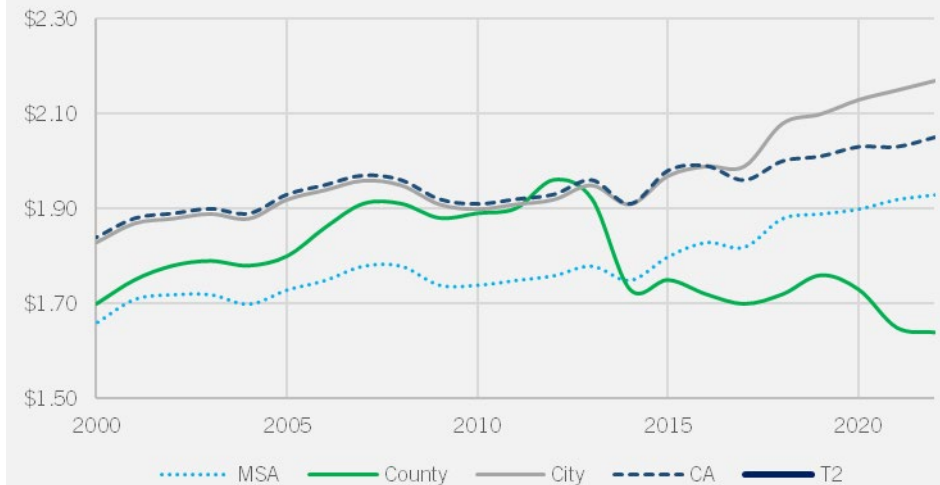
Vacancy Rate

Source: Costar



Effective Rent PSF

Source: Costar

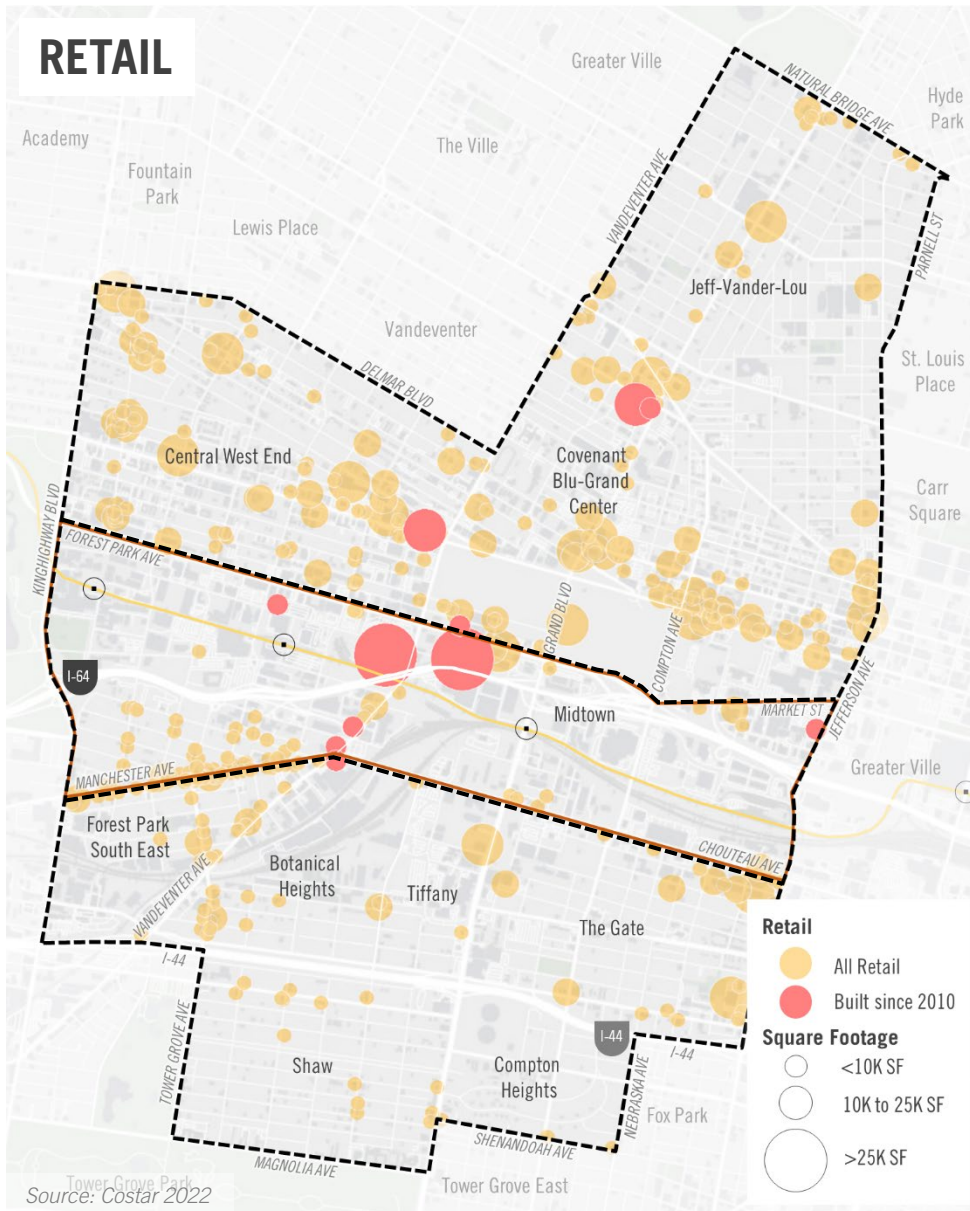


Given the presence of St. Louis University, student housing development has been strong in and around the Tier 2 Study Area with four new properties delivered since 2010 and one property in the pipeline.

REGIONAL REAL ESTATE OVERVIEW

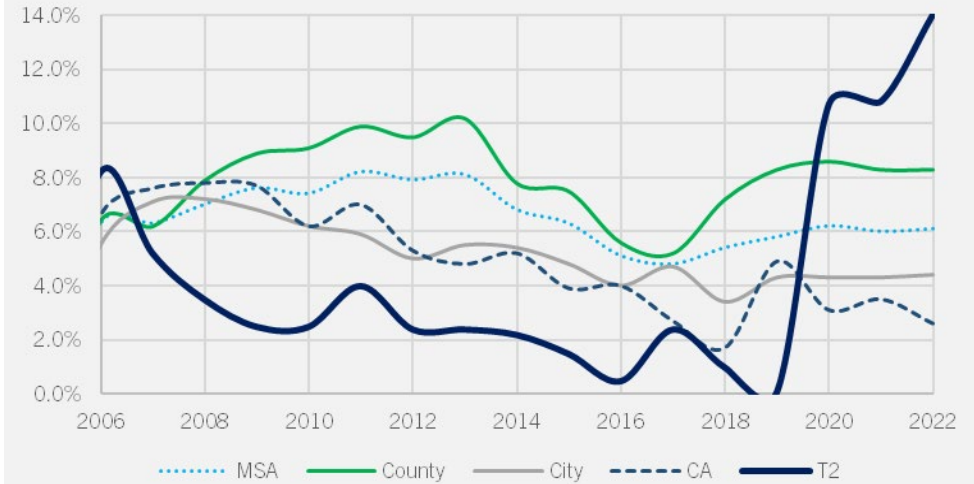
RETAIL TRENDS

RETAIL



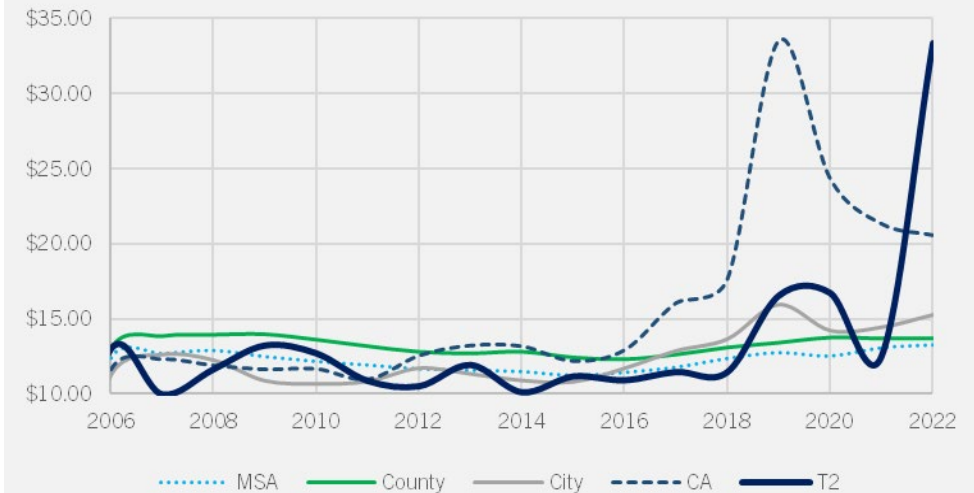
Vacancy Rate

Source: Costar



Gross Rent PSF

Source: Costar

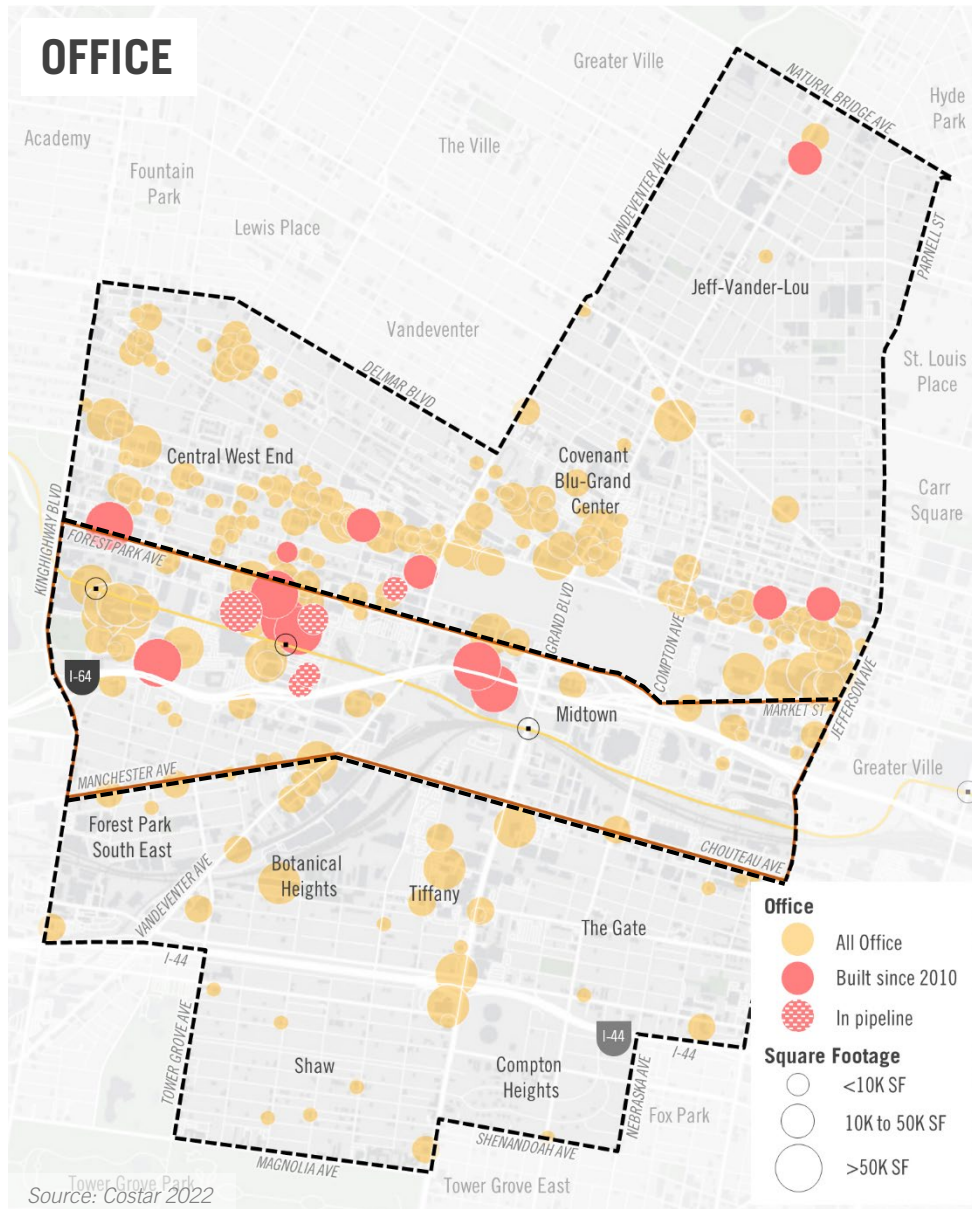


Retail vacancy increased significantly in the Tier 2 Study area given the recently delivered Foundry that has had slow absorption given the COVID-19 pandemic's impacts on the retail market. This development also impacted average gross rents with the property achieving some of the highest rents in the region.

REGIONAL REAL ESTATE OVERVIEW

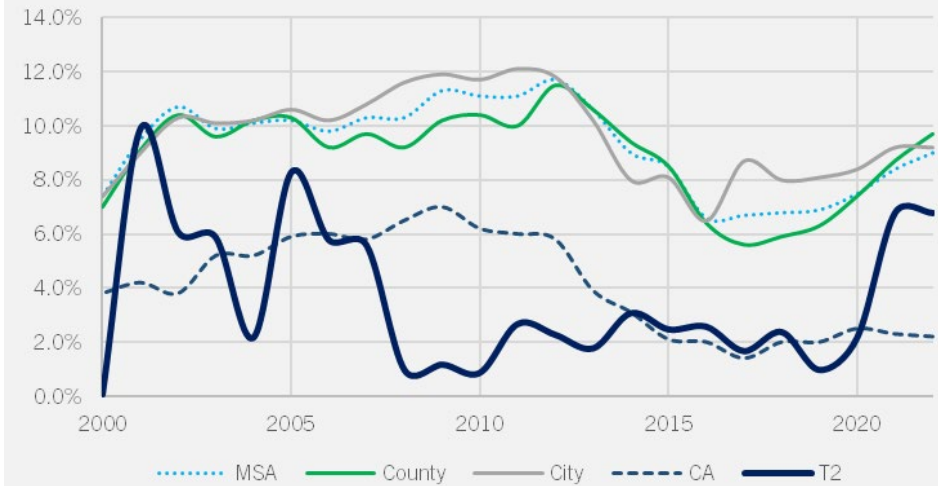
OFFICE TRENDS

OFFICE



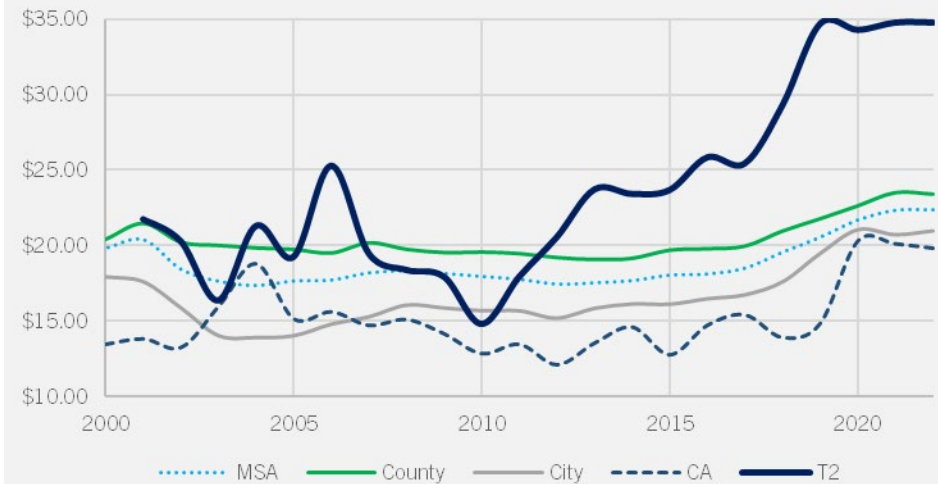
Vacancy Rate

Source: Costar



Gross Rent PSF

Source: Costar

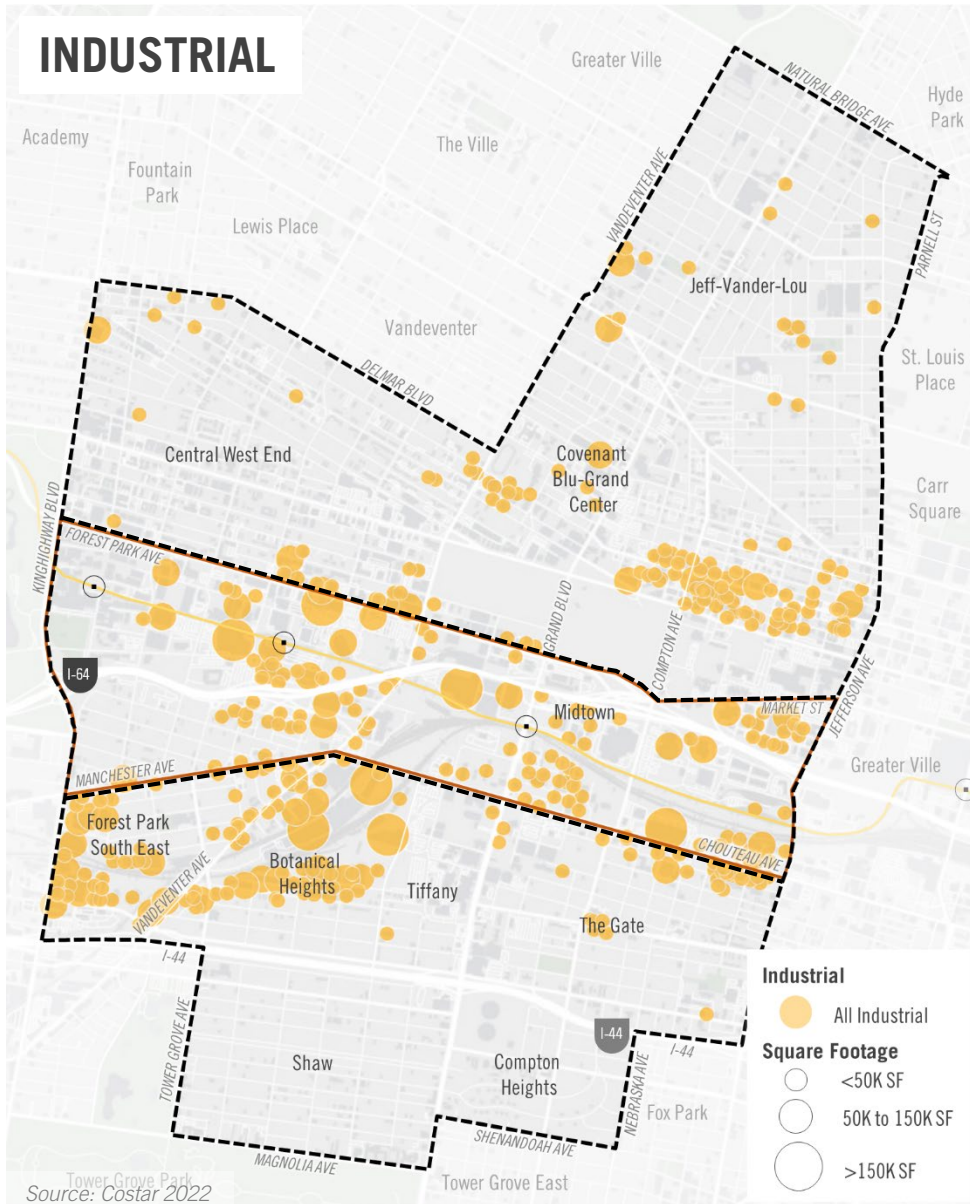


Since 2010, almost all of the city's office development activity has been in the Tier 2 Study Area with significant activity in CORTEX and Washington University Medical Campus. This new supply has led to an increase in average vacancy, but a significant increase in gross rents that are significantly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

REGIONAL REAL ESTATE OVERVIEW

INDUSTRIAL TRENDS

INDUSTRIAL



Vacancy Rate

Source: Costar



All Service Rent PSF

Source: Costar

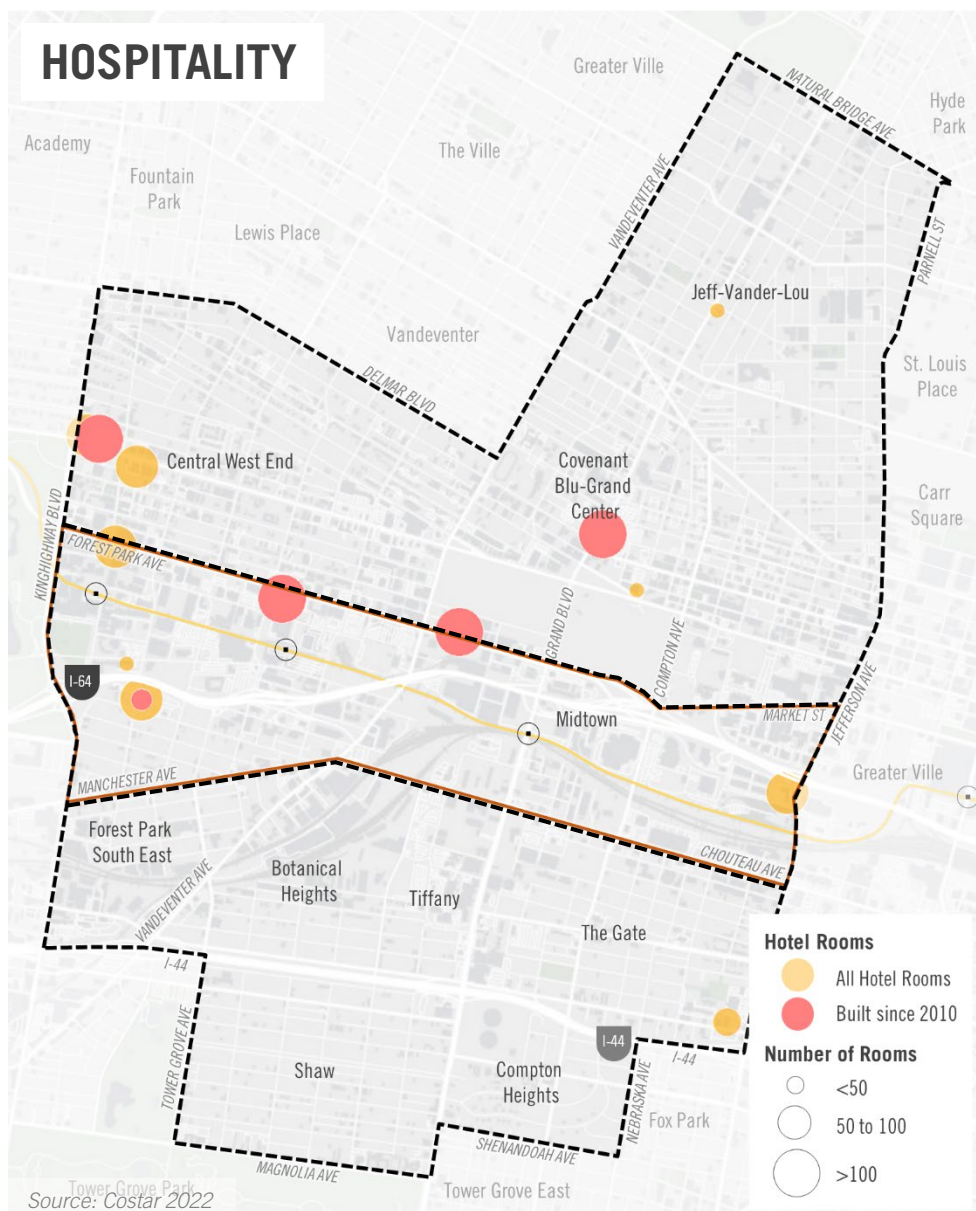


While the study areas contain a large supply of industrial space, there has been no industrial development activity since 2010 and the newest supply in the region has been in lower density areas that are more supportive of the real estate specifications for transportation, warehousing, and logistics. 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.

REGIONAL REAL ESTATE OVERVIEW

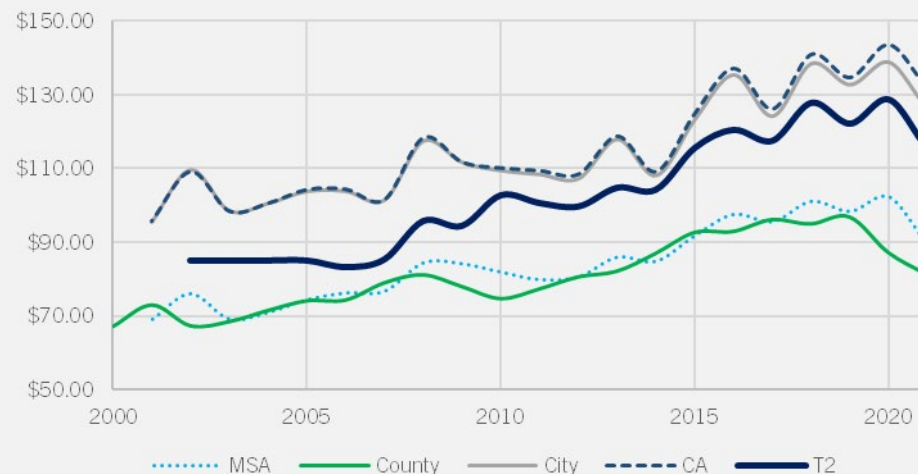
HOSPITALITY TRENDS

HOSPITALITY



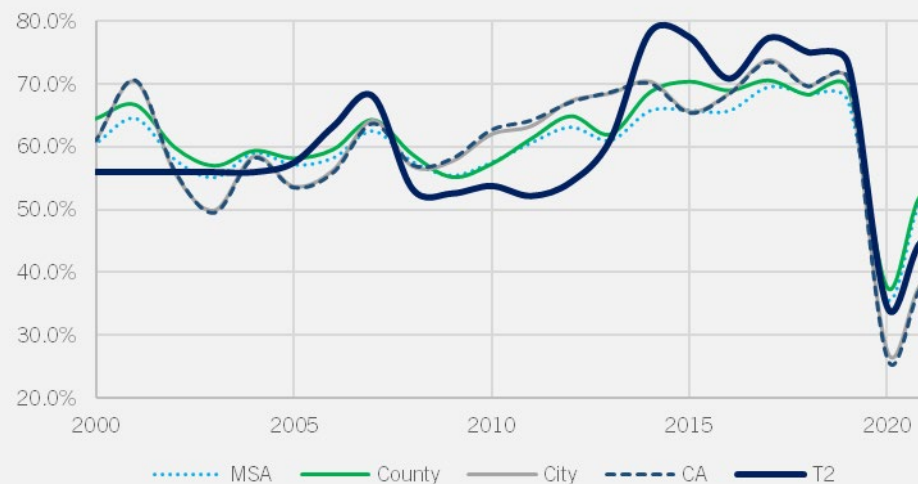
Average Daily Rate (ADR)

Source: Costar



Occupancy Rate

Source: Costar



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

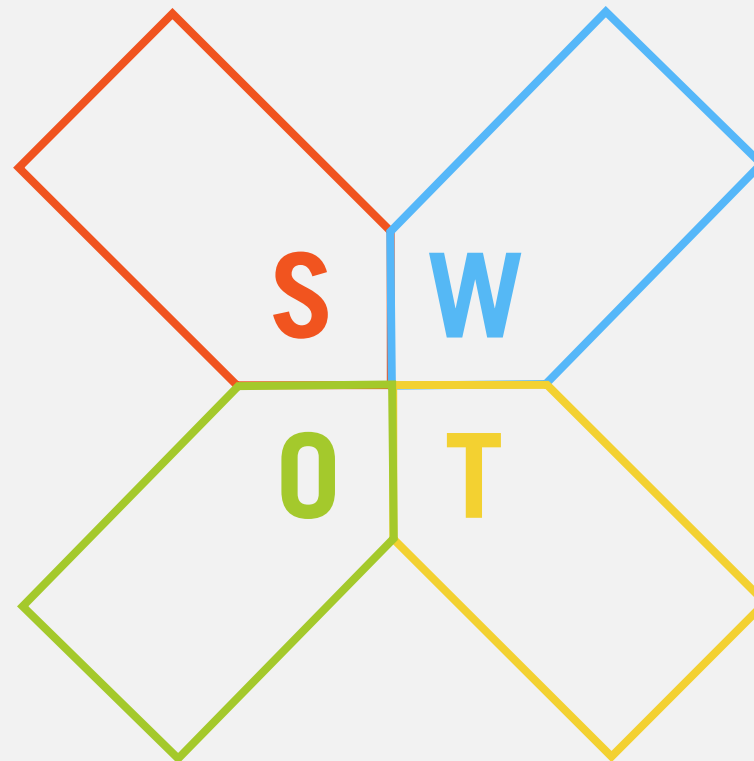
REAL ESTATE SWOT ANALYSIS

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

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



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

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

An aerial photograph of a city grid, likely Chicago, with a blue overlay. The overlay consists of several horizontal bars of varying shades of blue, some containing white text. The text includes 'Community Assessment Framework', 'Introduction to Study Area', 'Market & Economy', 'People & Neighborhoods', and a large 'Economic Development' box on the right.

Community Assessment Framework

Introduction to Study Area

Market & Economy

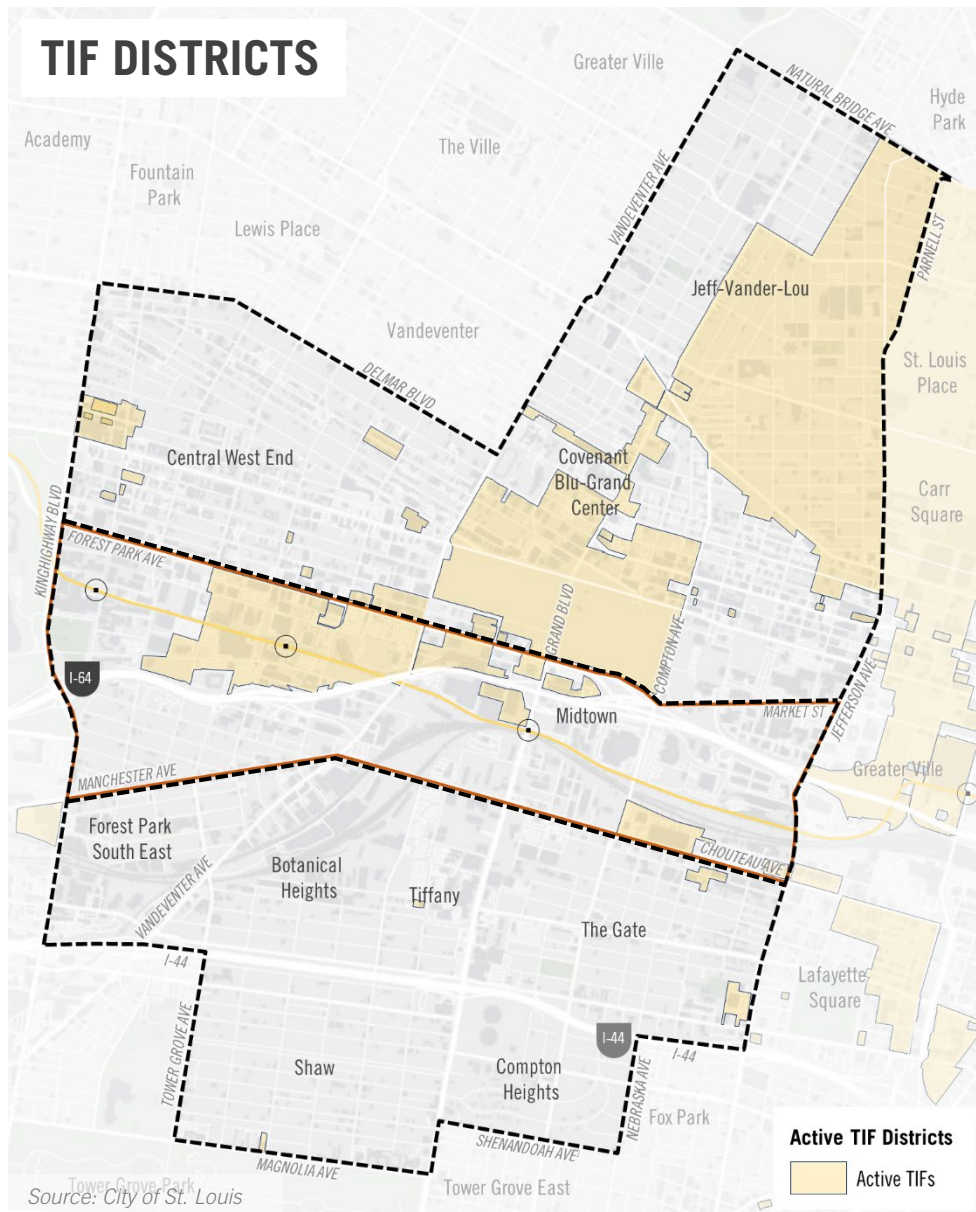
People & Neighborhoods

**Economic
Development**

ECONOMIC DEVELOPMENT

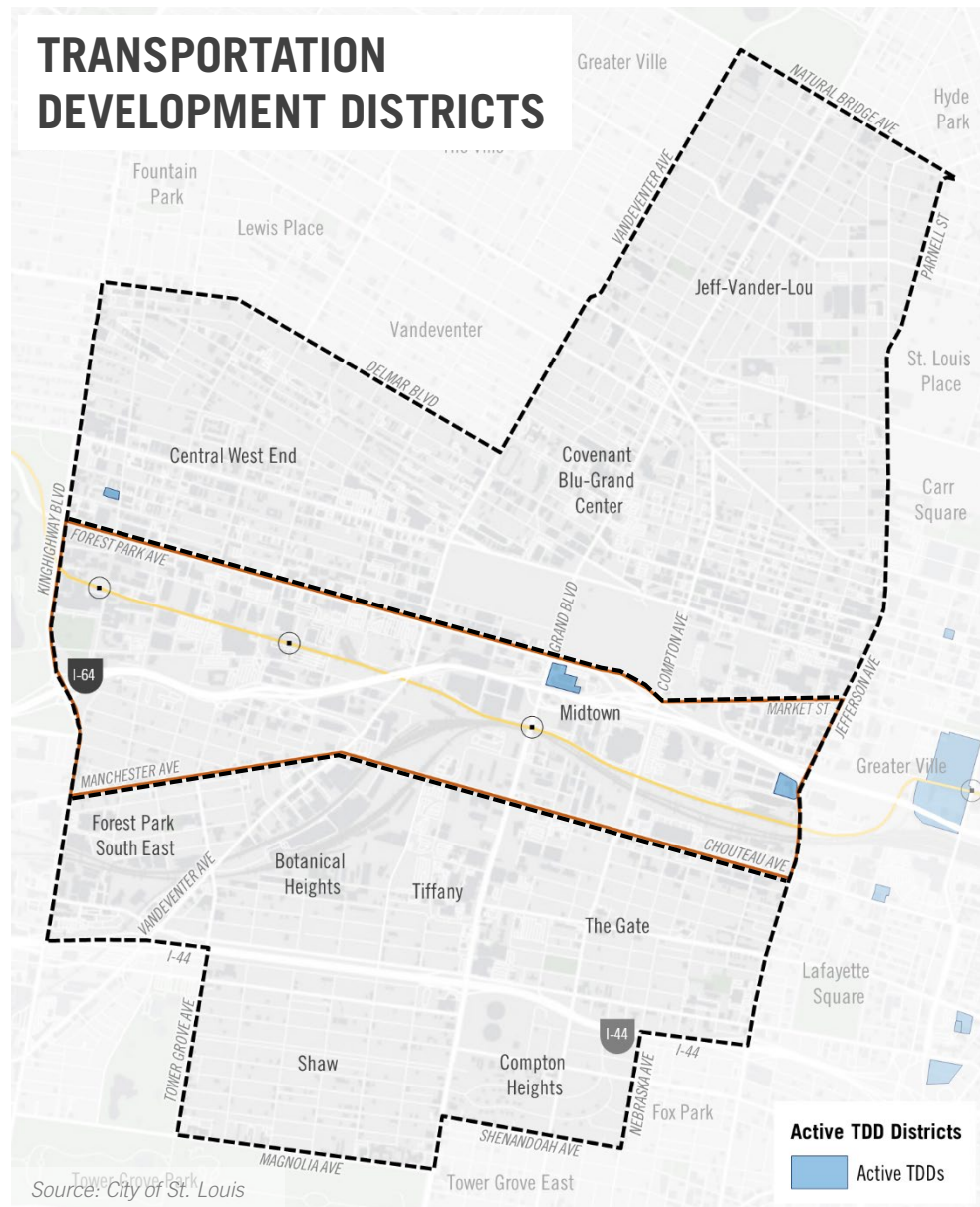
TAX INCREMENT FINANCING (TIF) AND TRANSPORTATION DEVELOPMENT (TDD) DISTRICTS

TIF DISTRICTS



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.

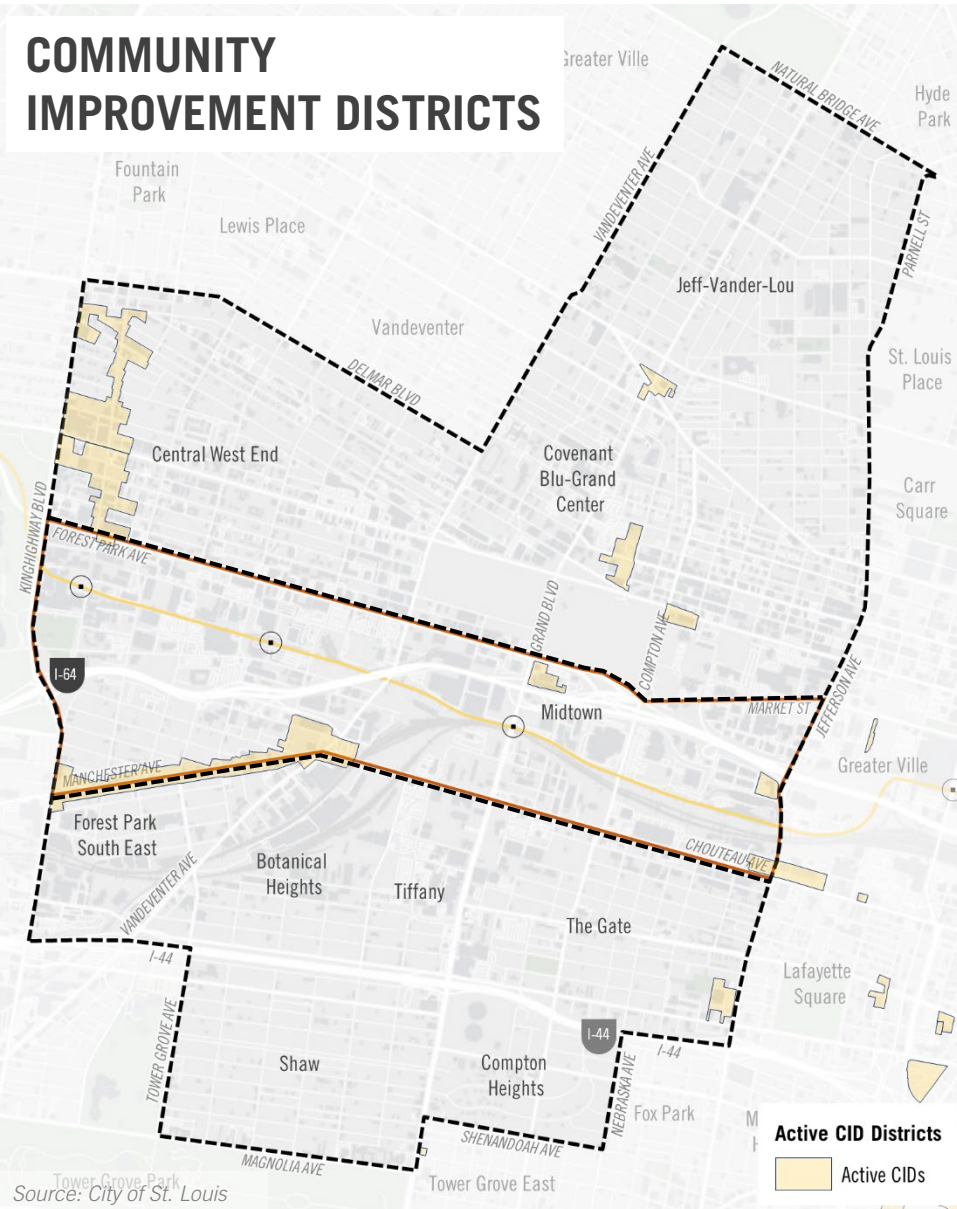
TRANSPORTATION DEVELOPMENT DISTRICTS



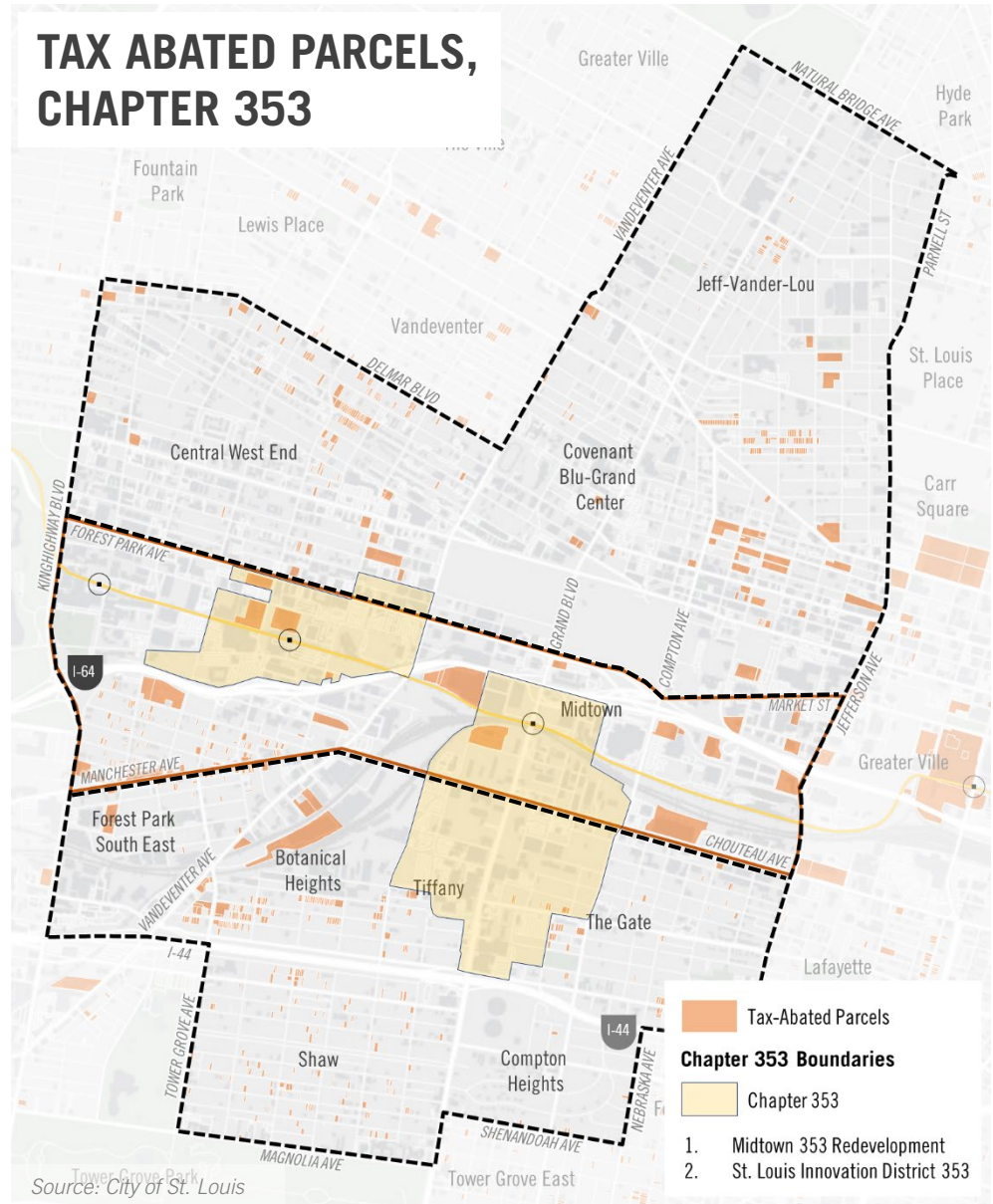
TDD has been used in a limited amount in the project area, but has served to provide funding for needed transportation-related upgrades to attract redevelopment. Additional use of TDD to provide a funding mechanism for additional redevelopment is likely in the future, and that new growth will likely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

ECONOMIC DEVELOPMENT

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



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 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.

An aerial photograph of a city, likely Chicago, showing a dense grid of streets and buildings. The image is overlaid with four horizontal bars of different colors (white, light blue, white, dark blue) containing text. The text is arranged vertically from top to bottom: 'Community Assessment Framework', 'Introduction to Study Area', 'Market & Economy', and 'People & Neighborhoods'.

Community Assessment Framework

Introduction to Study Area

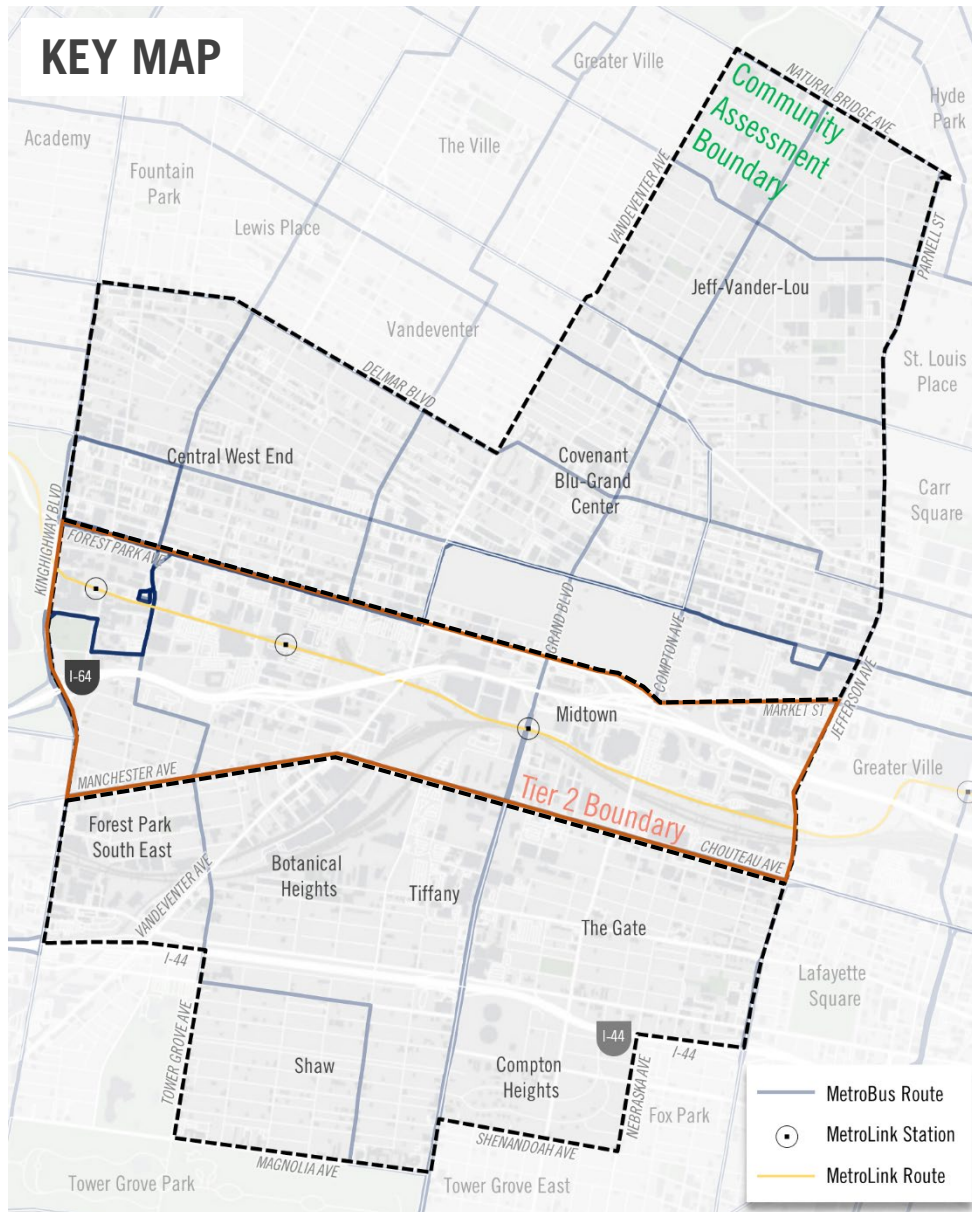
Market & Economy

People & Neighborhoods

PEOPLE & NEIGHBORHOODS

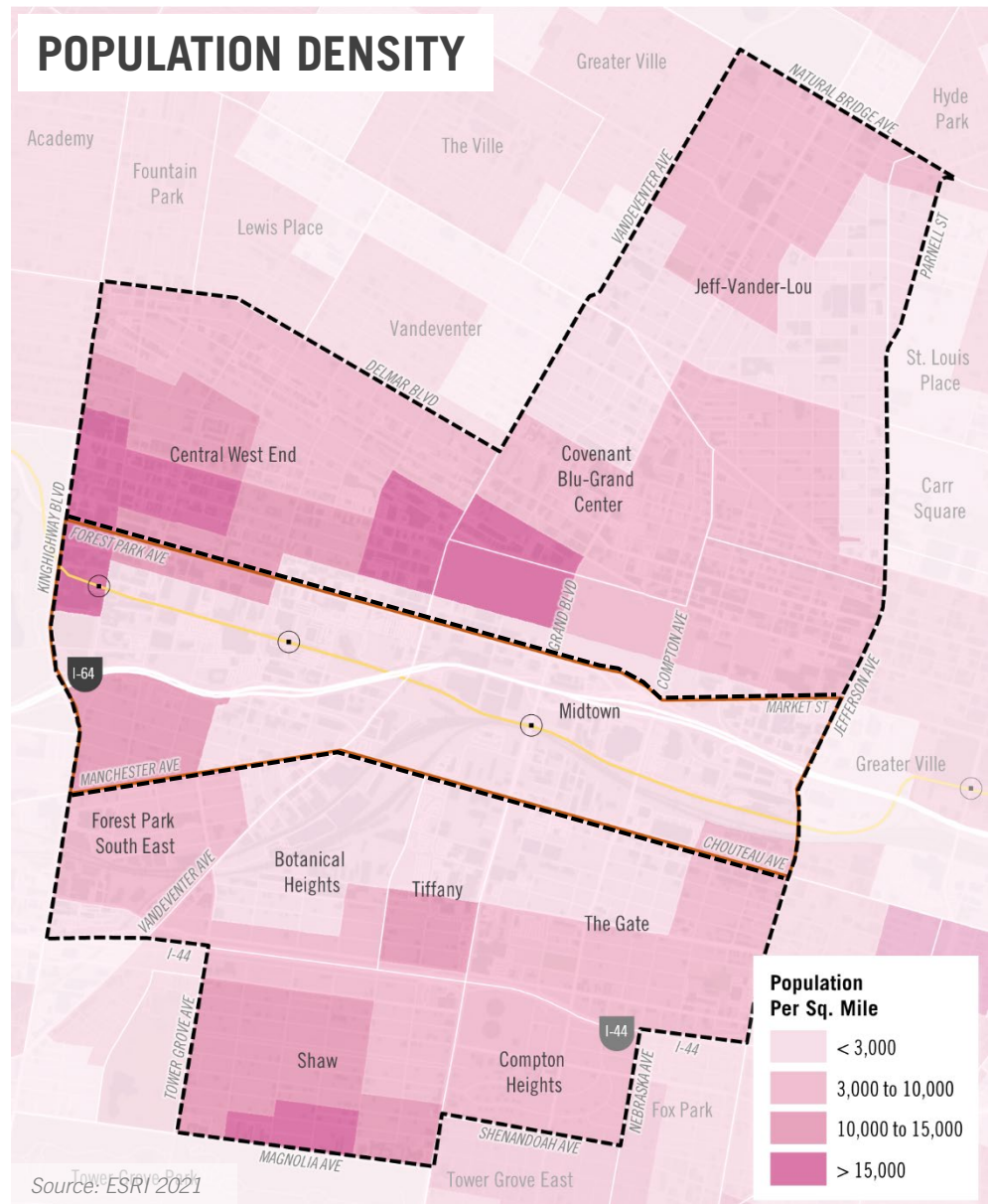
POPULATION DENSITY

KEY MAP



The Tier 2 Study Area is part of 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

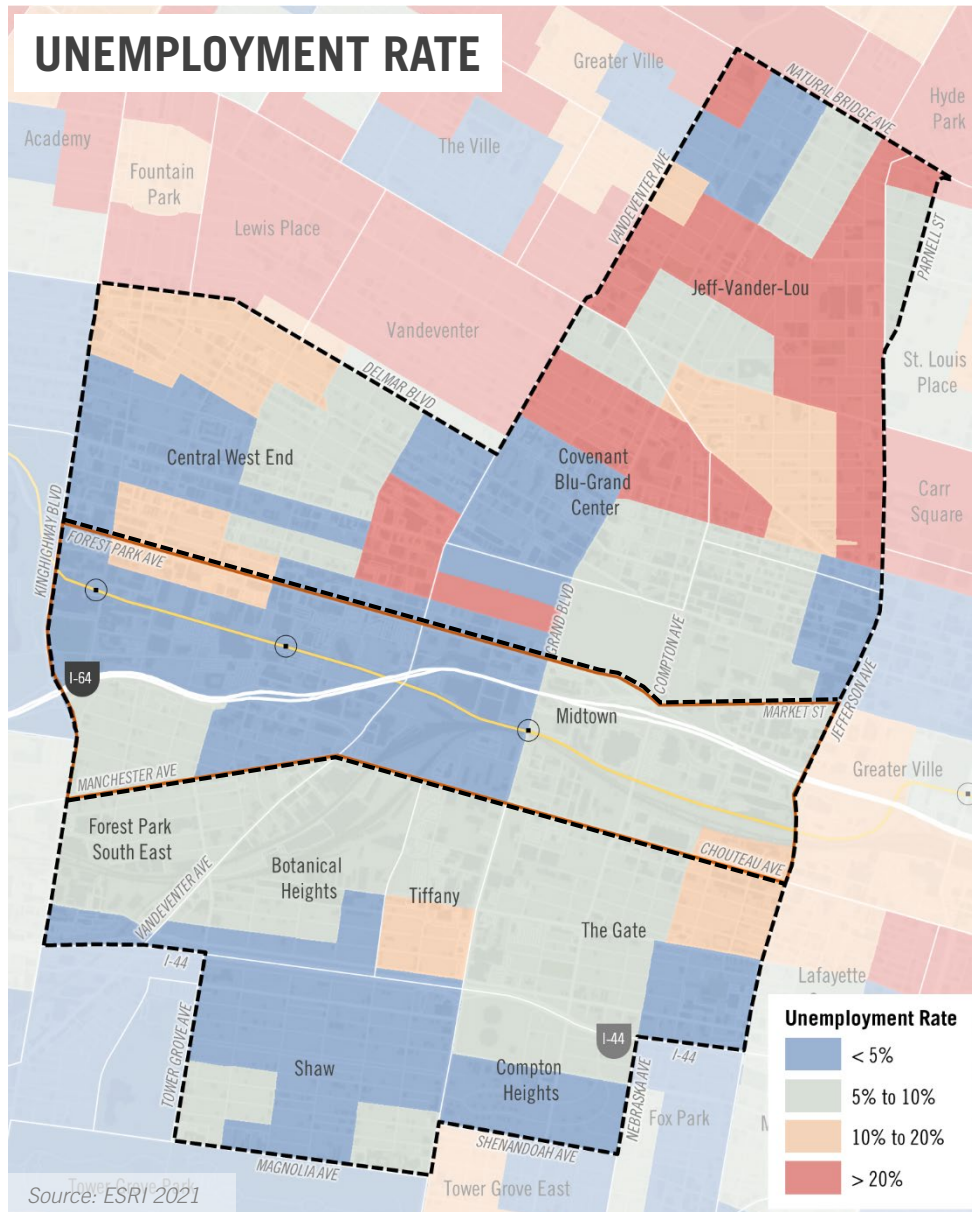


Population density is relatively high in the Central West End just north of the Tier 2 Study Area. The study area has a low population density since it is primarily commercial and industrial.

PEOPLE & NEIGHBORHOODS

UNEMPLOYMENT RATE & CRIME RATE

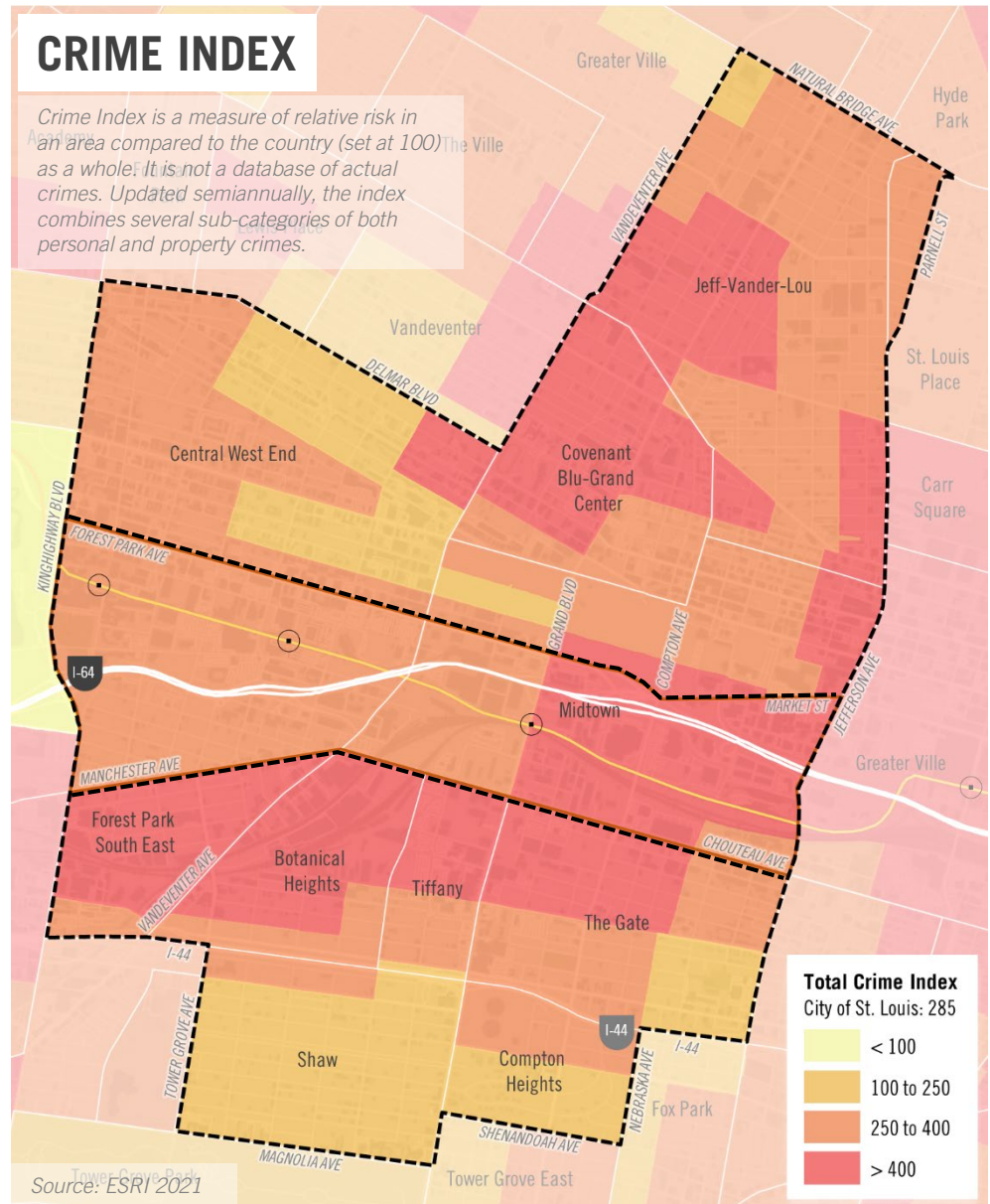
UNEMPLOYMENT RATE



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.



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

© ESRI, 2021

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

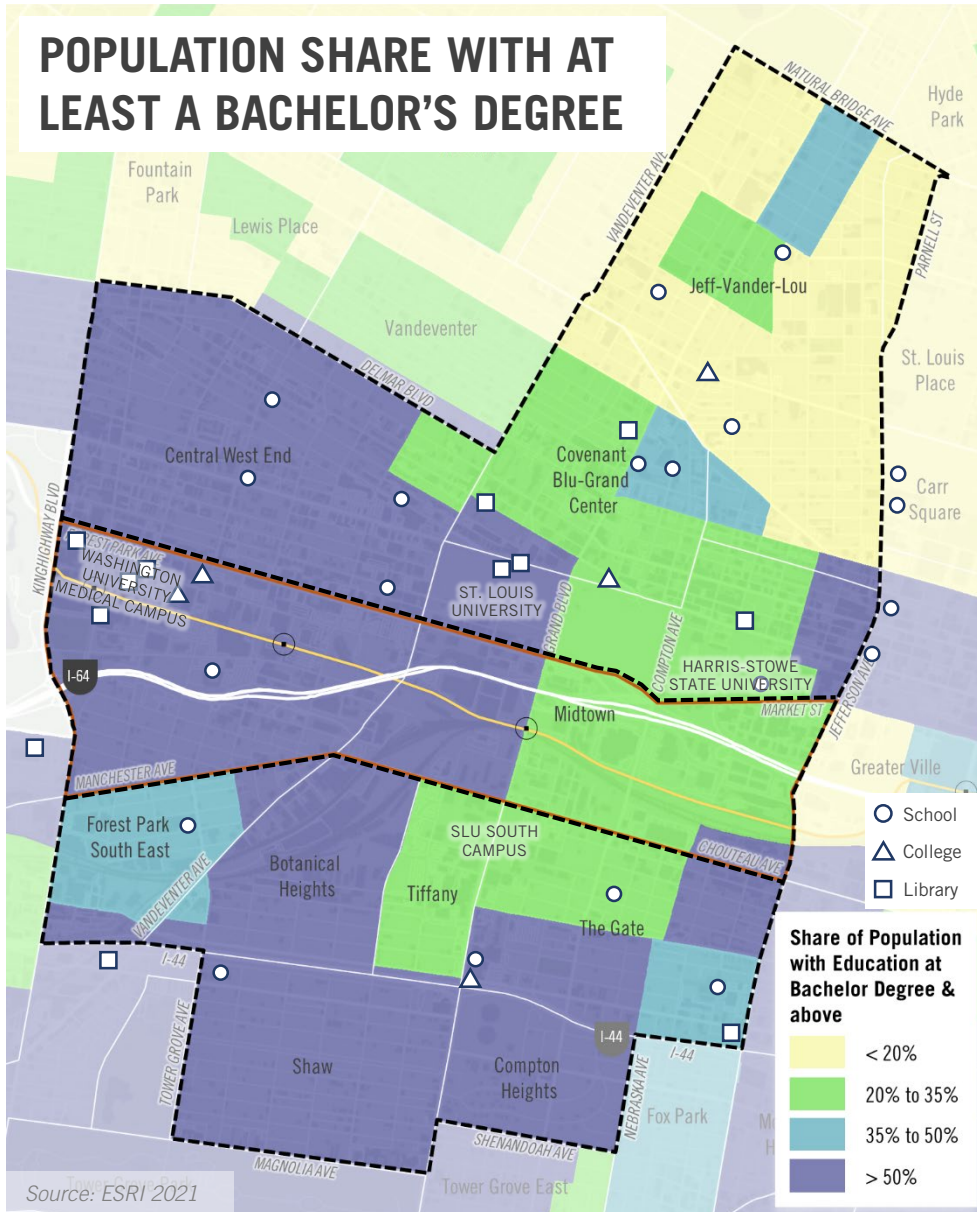
© ESRI, 2021

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.

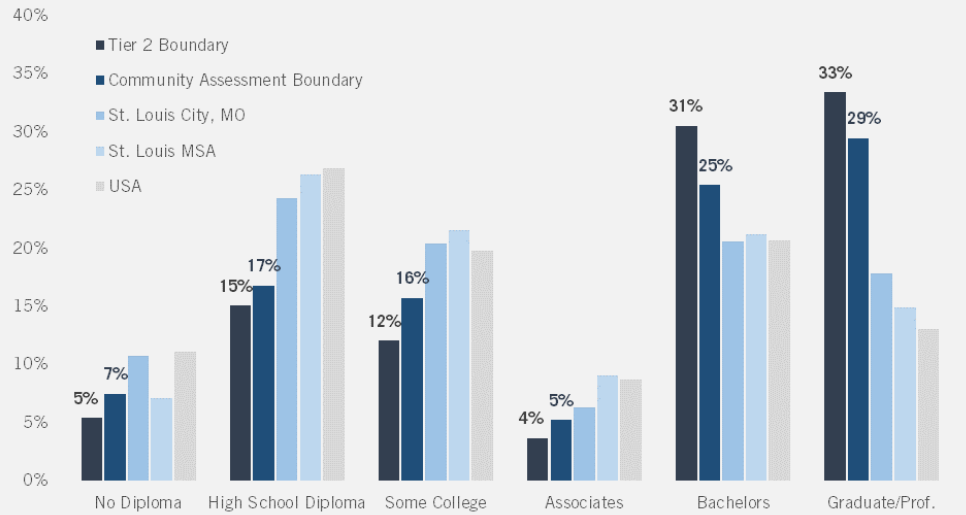
DEMOGRAPHICS: PEOPLE & HOUSEHOLDS

EDUCATIONAL ATTAINMENT

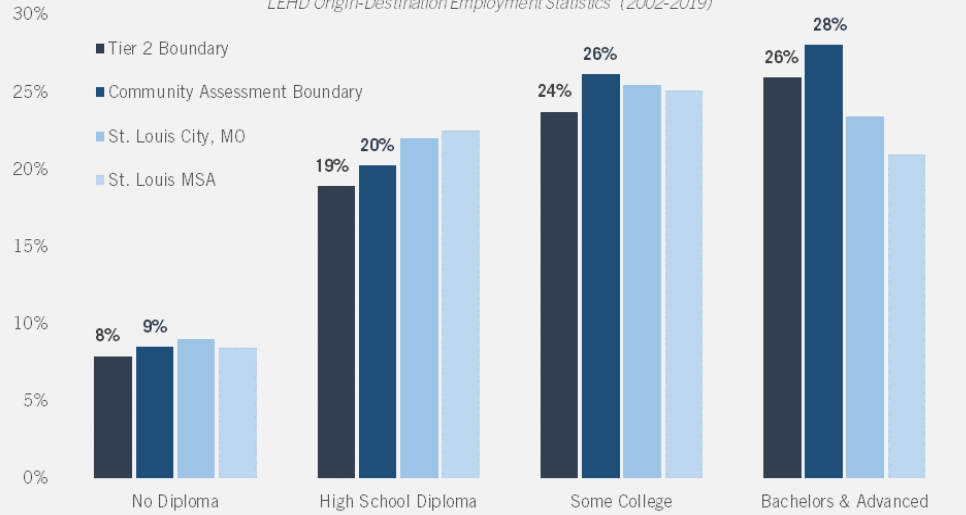
POPULATION SHARE WITH AT LEAST A BACHELOR'S DEGREE



Educational Attainment of Residents, 2021
Source: ESRI



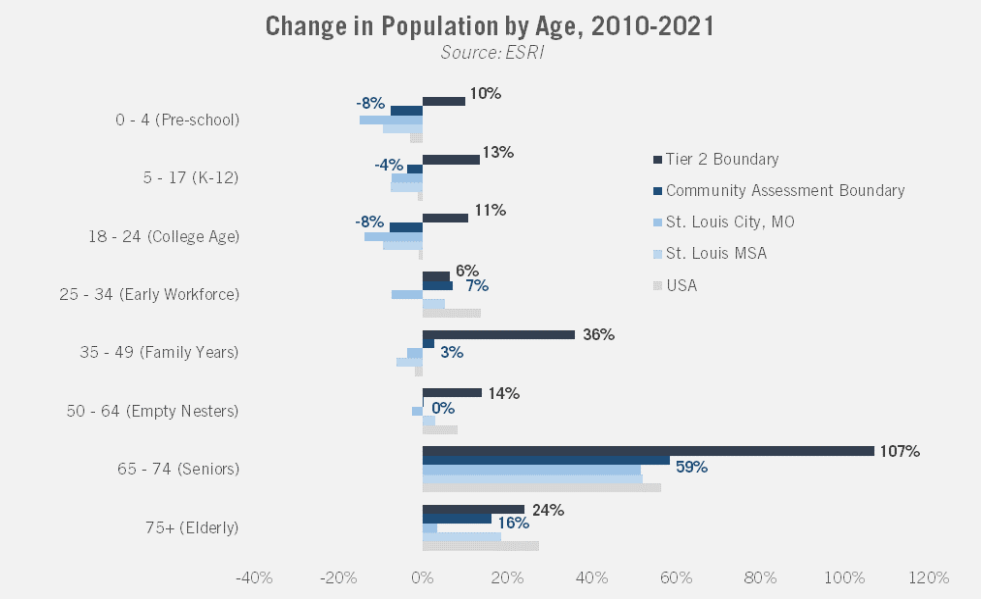
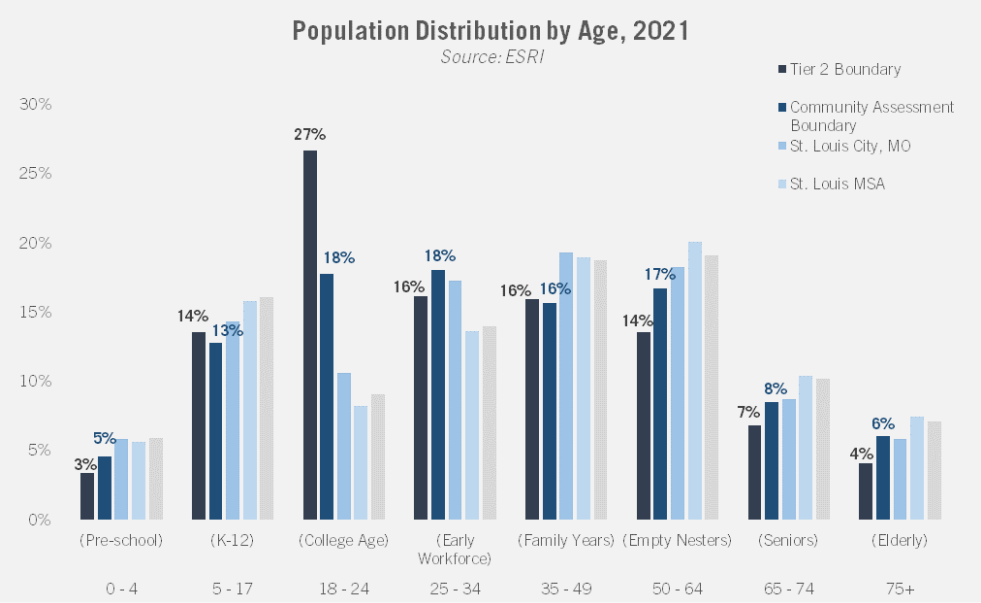
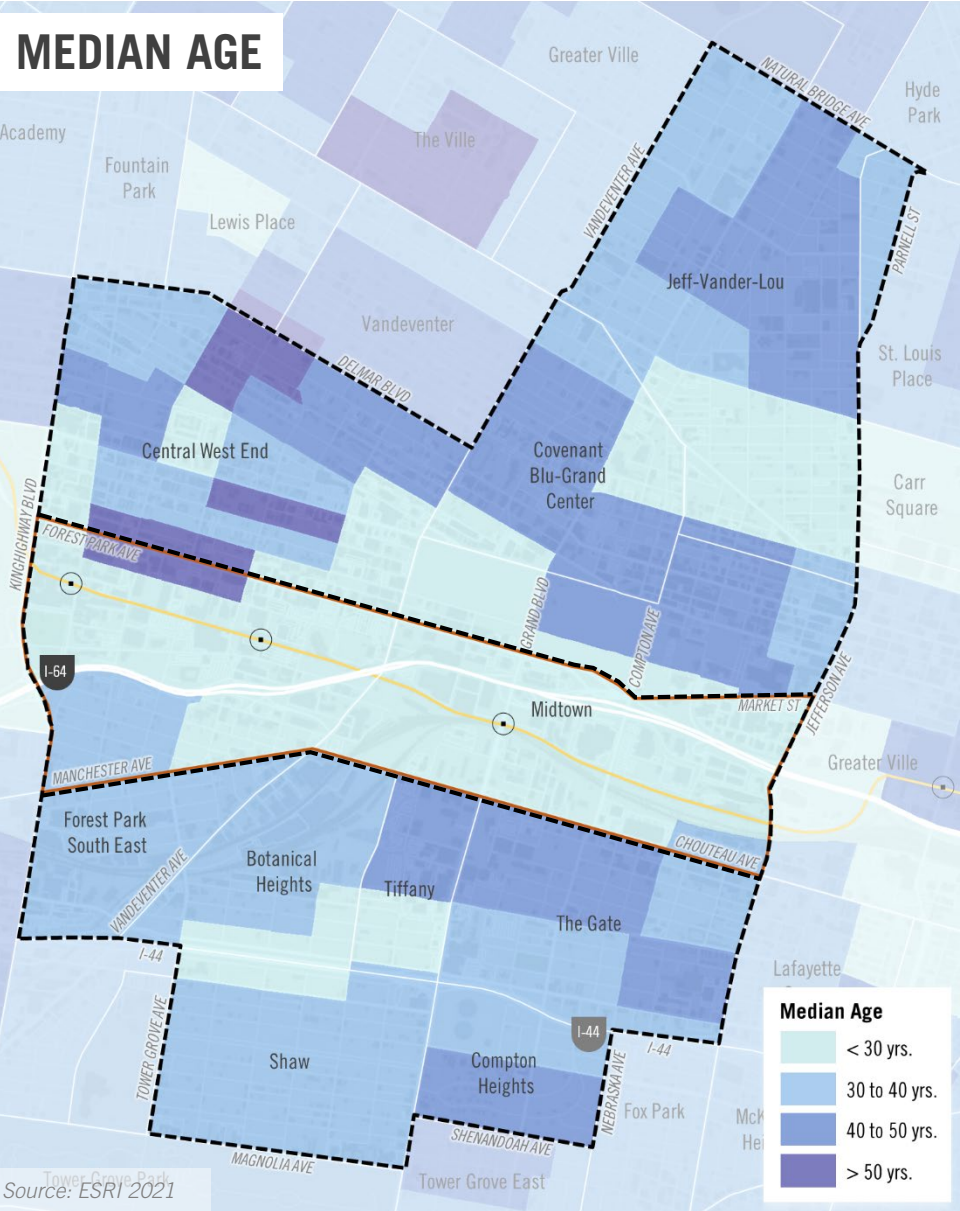
Educational Attainment for Jobs in Study Area, 2019
Source: US Census Bureau (OntheMap),
LEHD Origin-Destination Employment Statistics (2002-2019)



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

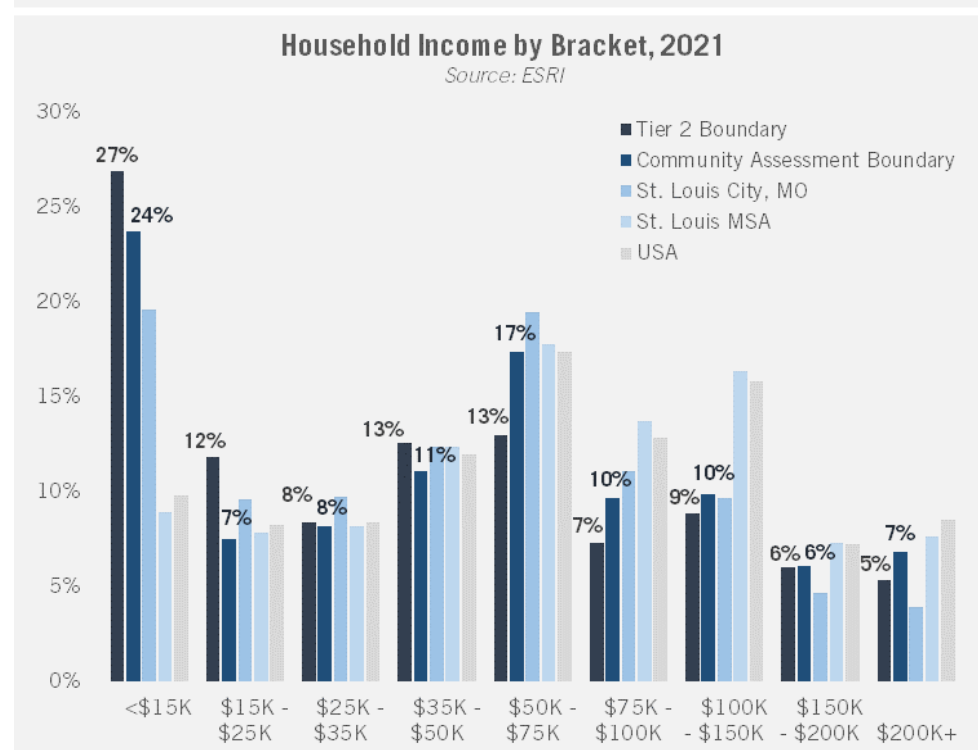
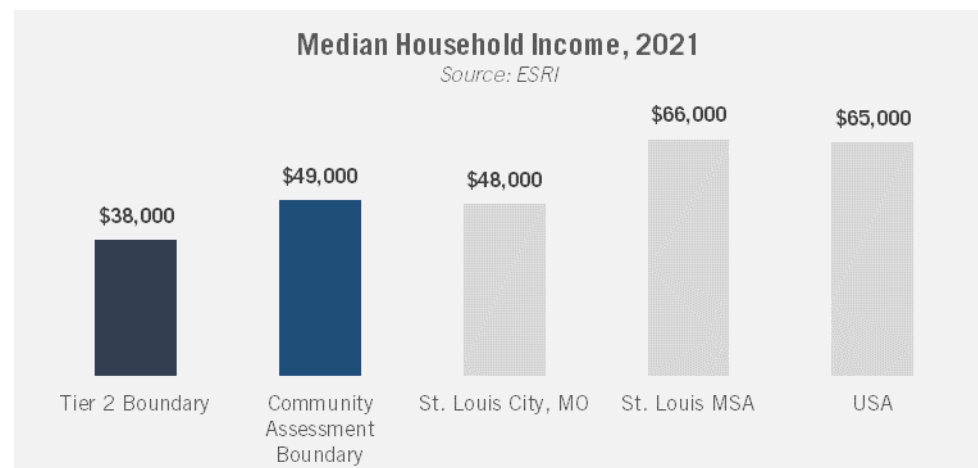
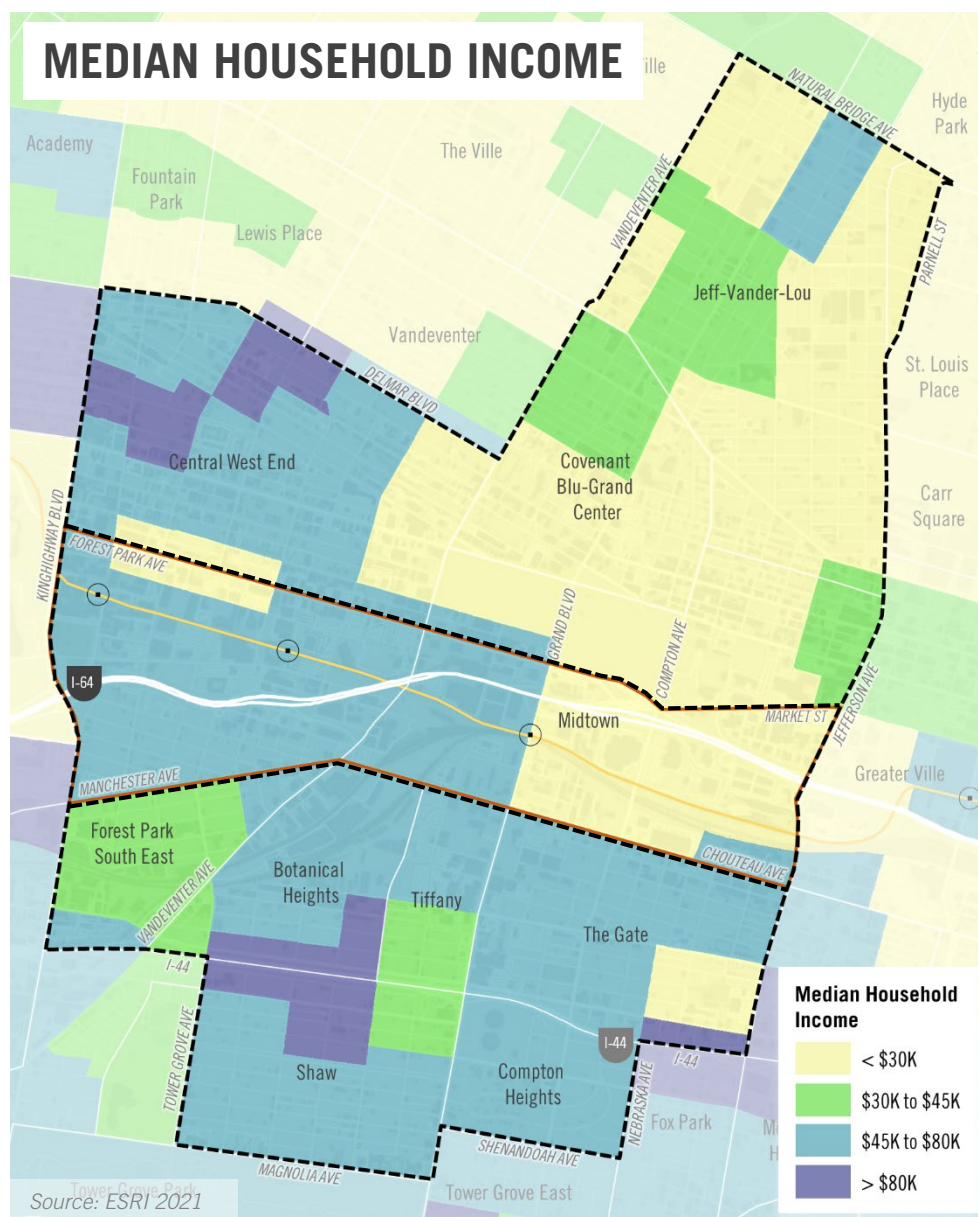
AGE OF RESIDENTS



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.

DEMOGRAPHICS: PEOPLE & HOUSEHOLDS

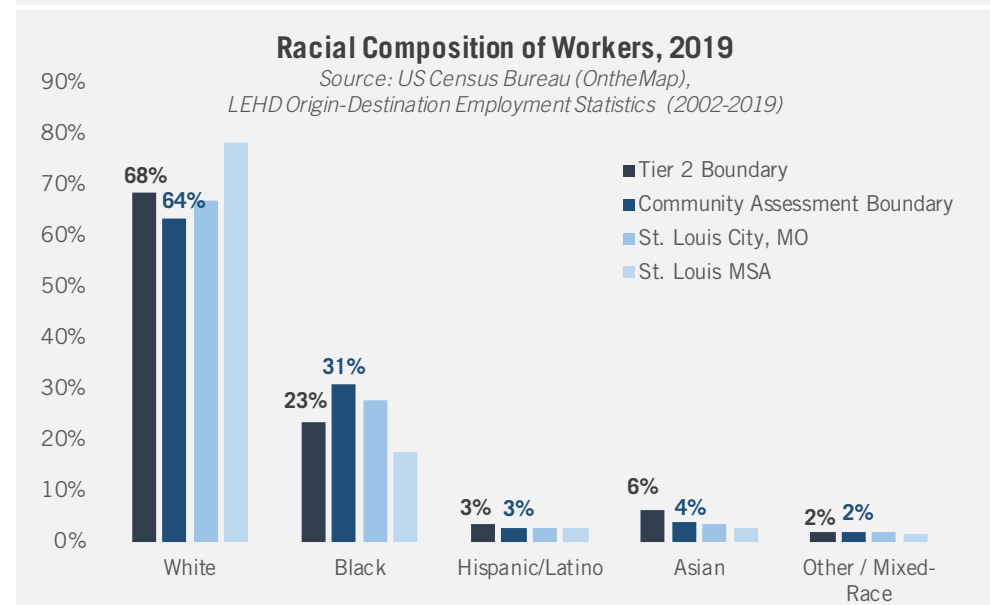
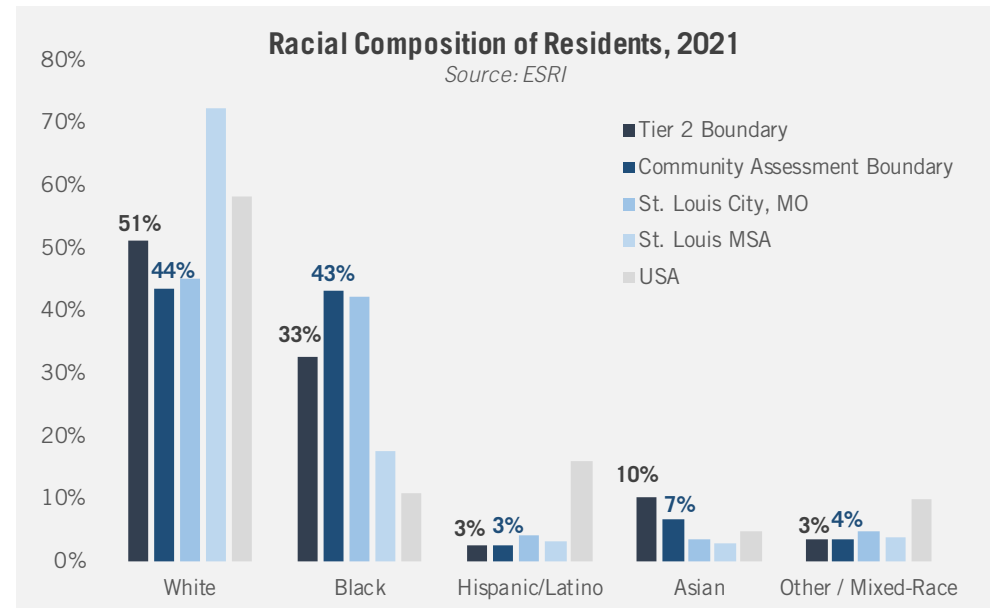
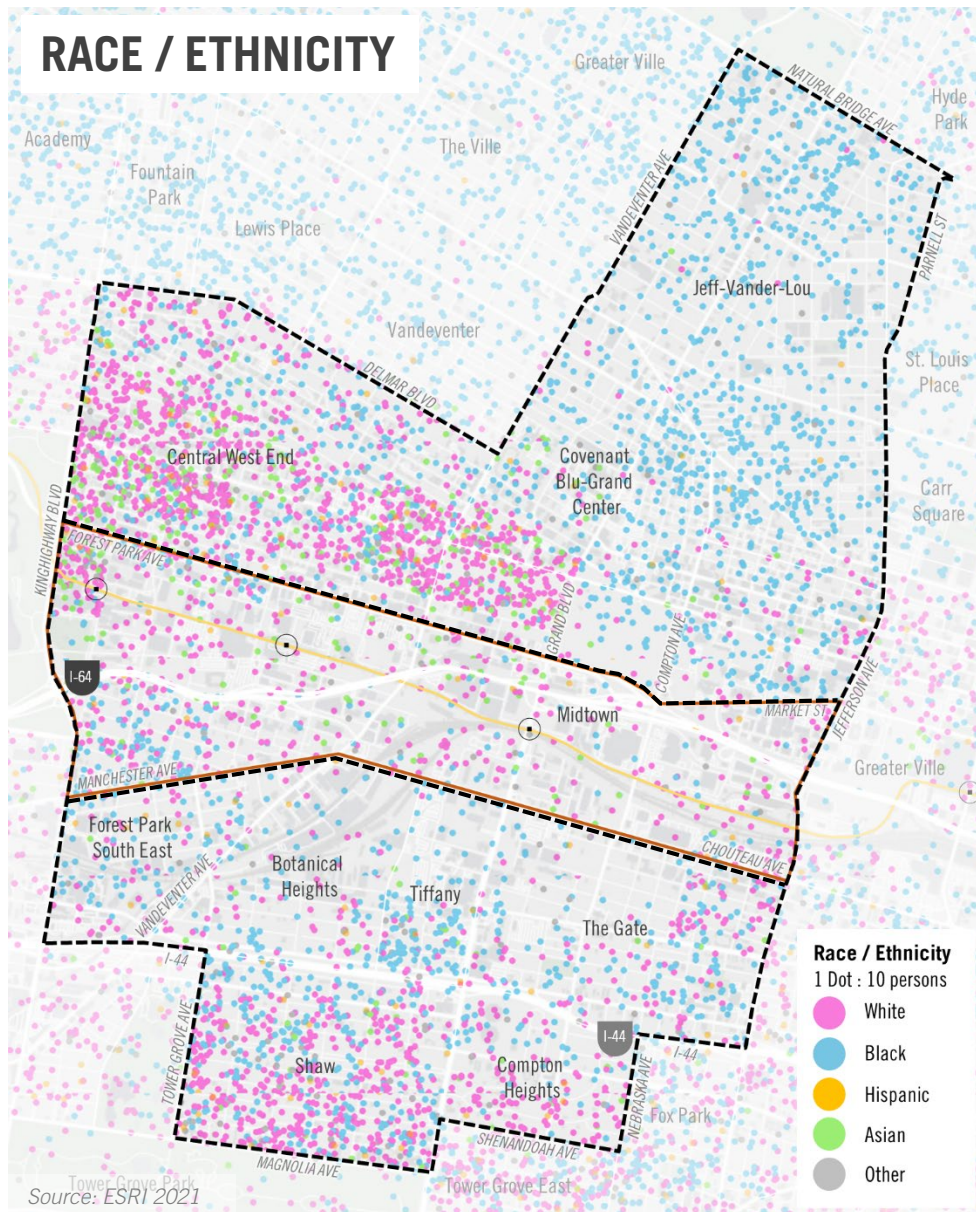
INCOME OF RESIDENTS



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.

DEMOGRAPHICS: PEOPLE & HOUSEHOLDS

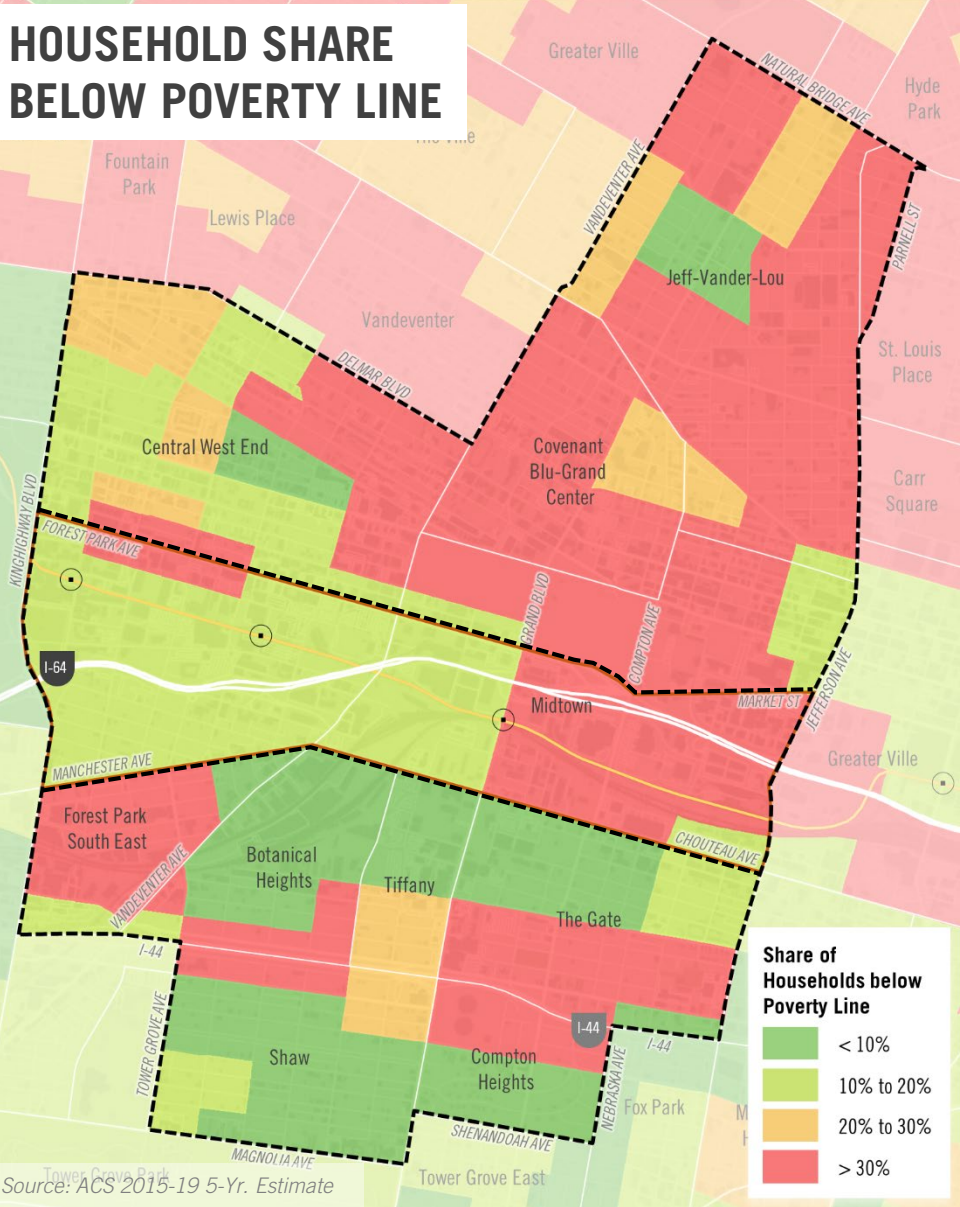
RACE / ETHNICITY



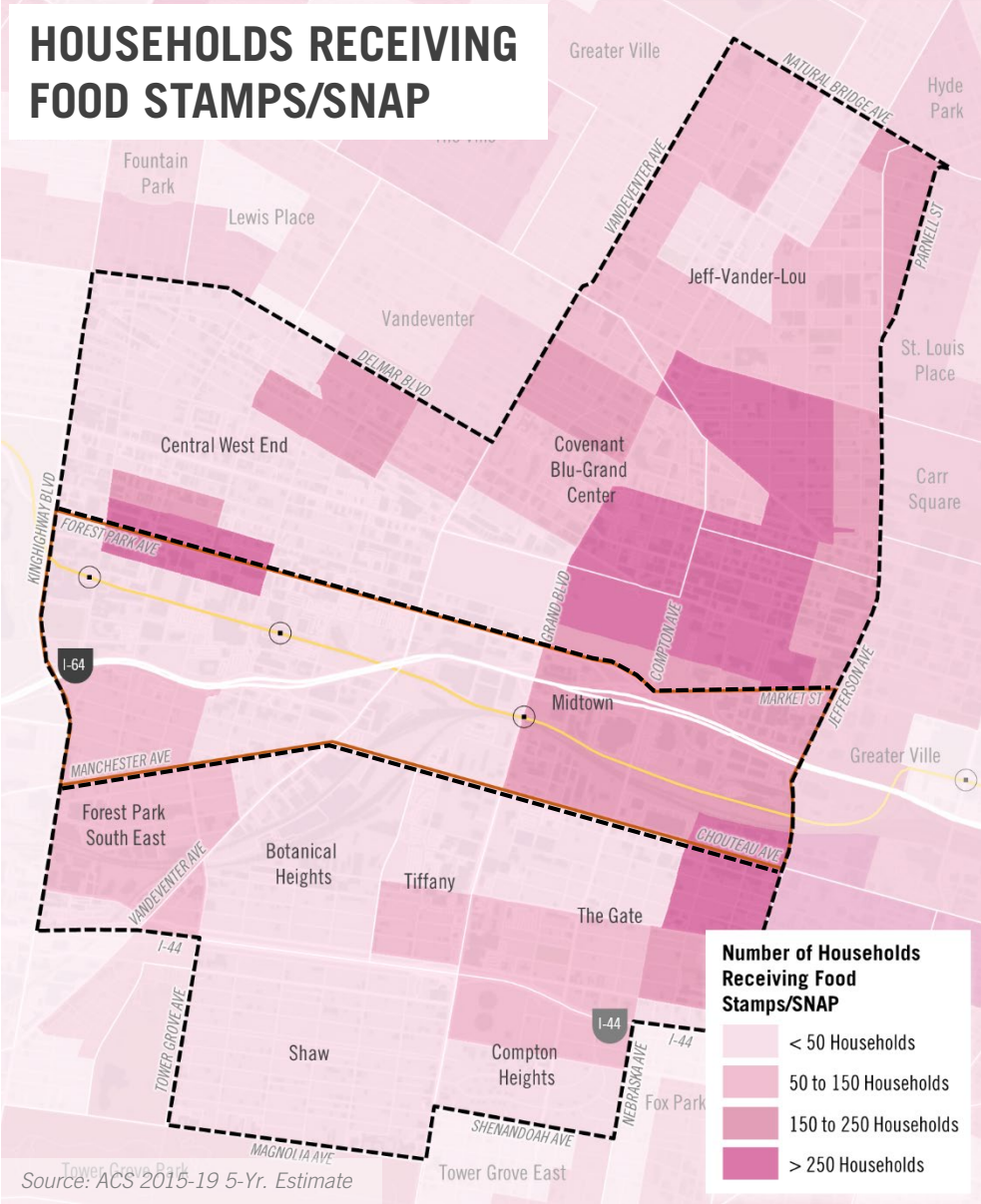
Overall racial composition in the Tier 2 Study Area and Community Assessment Boundary is similar to the city. But within the Community Assessment Boundary, there is greater diversity within neighborhoods. While Central West End and Shaw neighborhoods have relatively large White populations, there is 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



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.

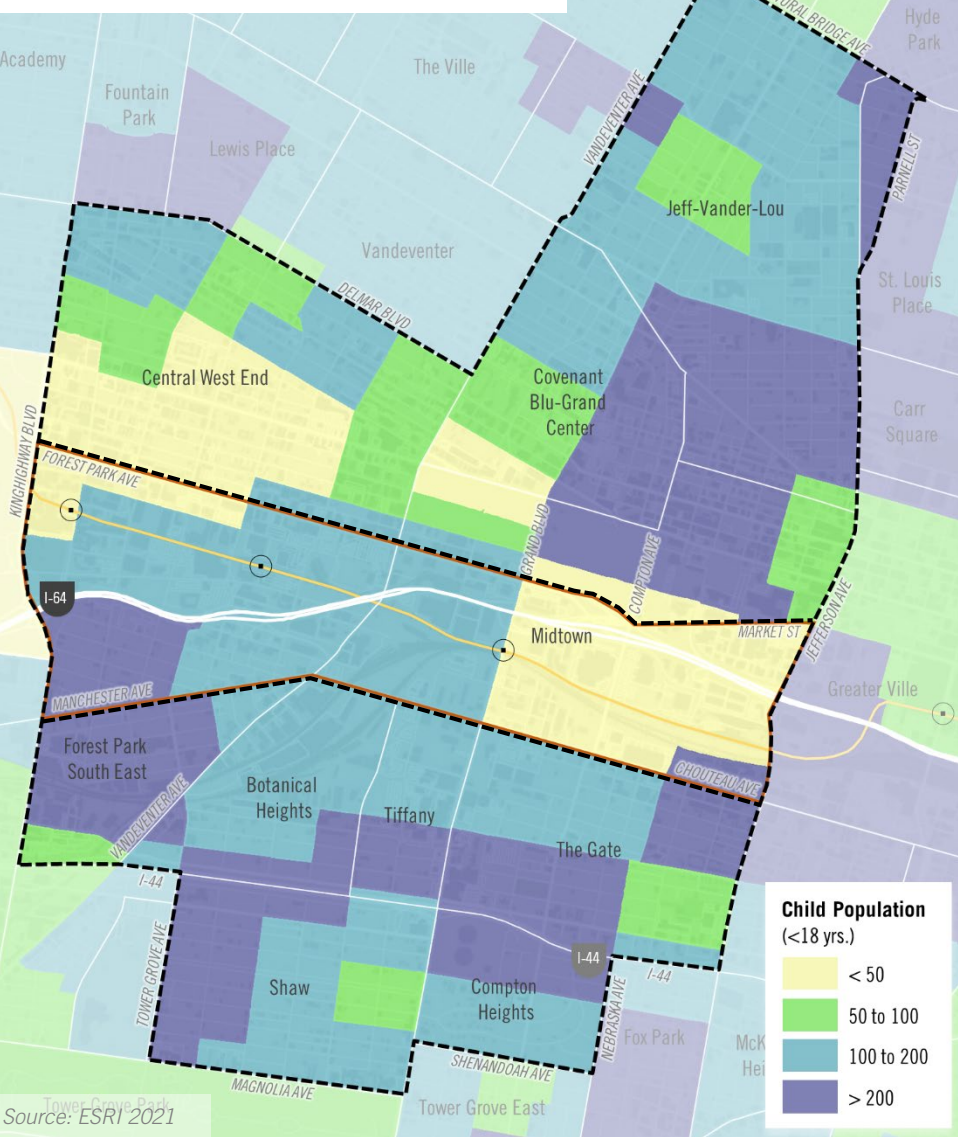


Areas with higher numbers of households receiving food stamps are generally consistent with the distribution of households living below the poverty line.

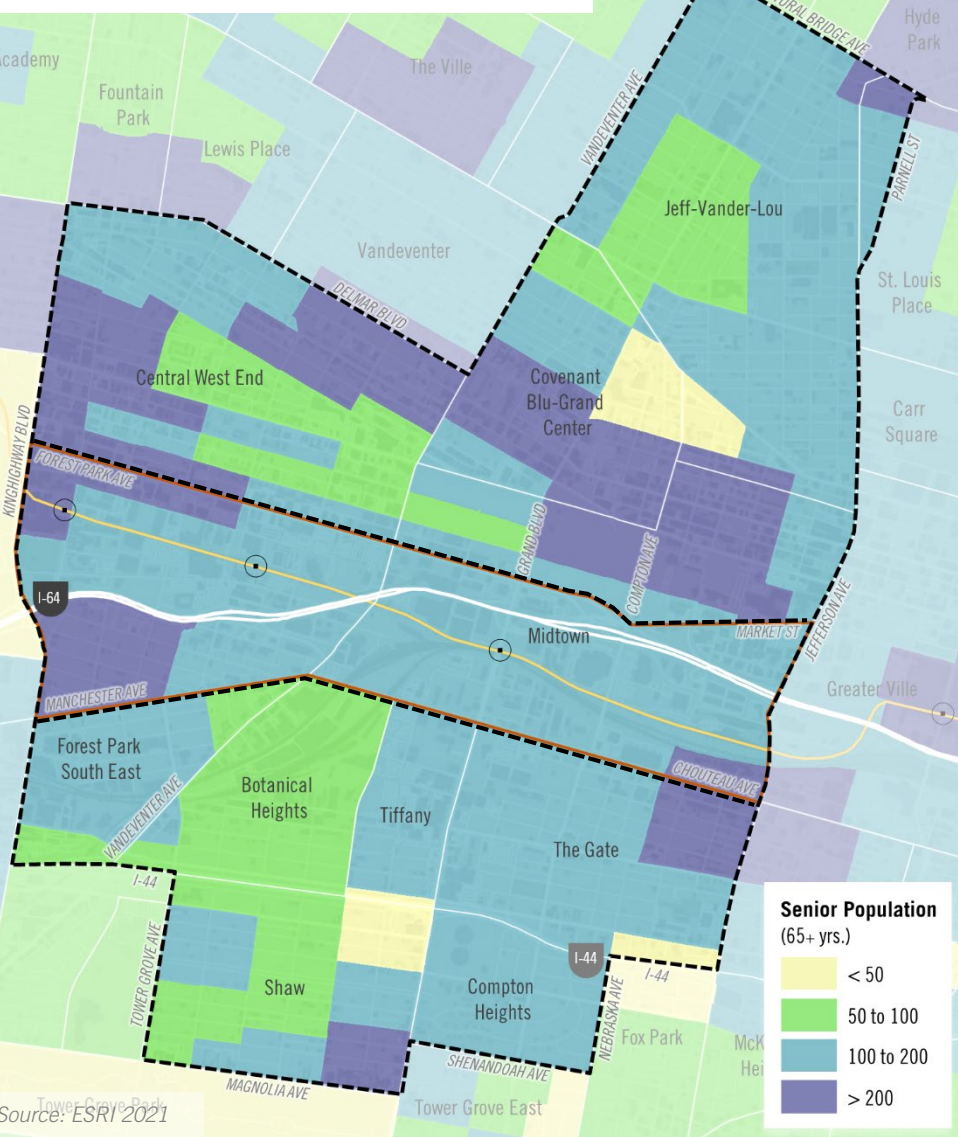
DEMOGRAPHICS: PEOPLE & HOUSEHOLDS

POPULATION OF CHILDREN AND SENIORS

CHILD POPULATION (<18 YRS.)



SENIOR POPULATION (65+ YRS.)



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.

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.

An aerial photograph of a city grid, likely Chicago, with a blue overlay. The overlay consists of several horizontal bars of varying shades of blue, each containing text. The text is white and bold. The background shows a dense urban landscape with streets, buildings, and some green spaces.

Community Assessment Framework

Introduction to Study Area

Market & Economy

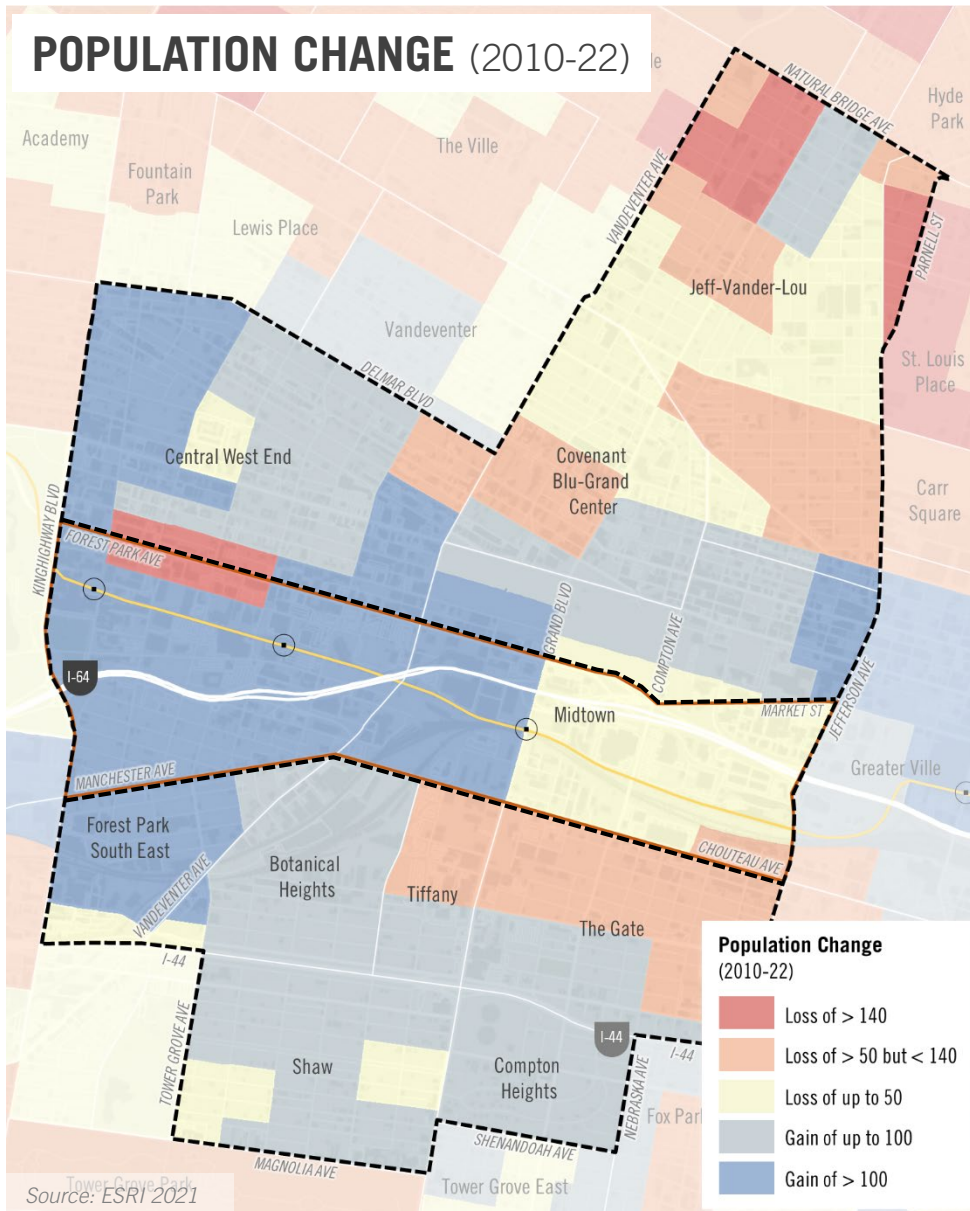
People & Neighborhoods

Housing Overview

HOUSING OVERVIEW

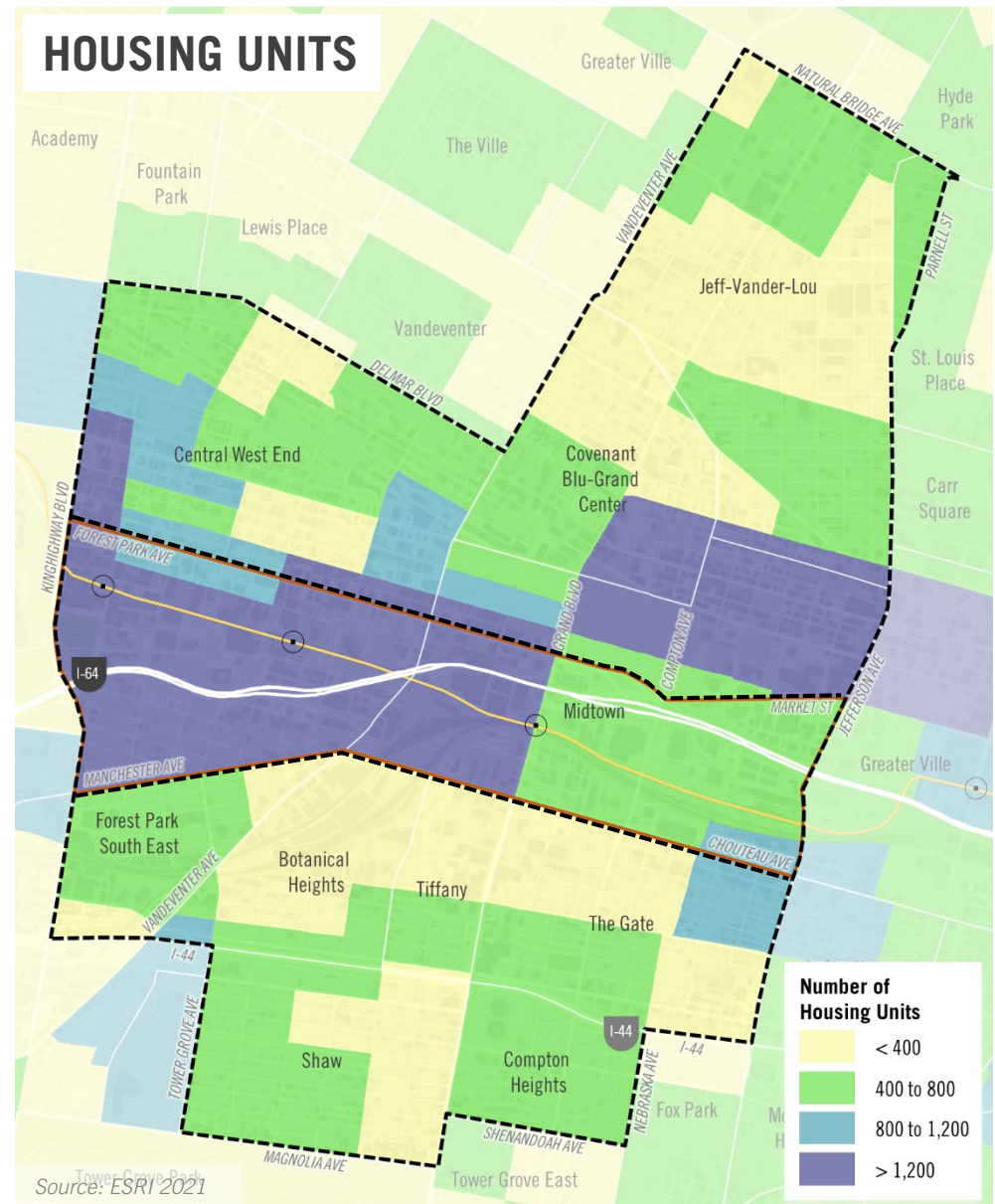
POPULATION CHANGE & HOUSING UNITS

POPULATION CHANGE (2010-22)



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



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%

© ESRI, 2021

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%

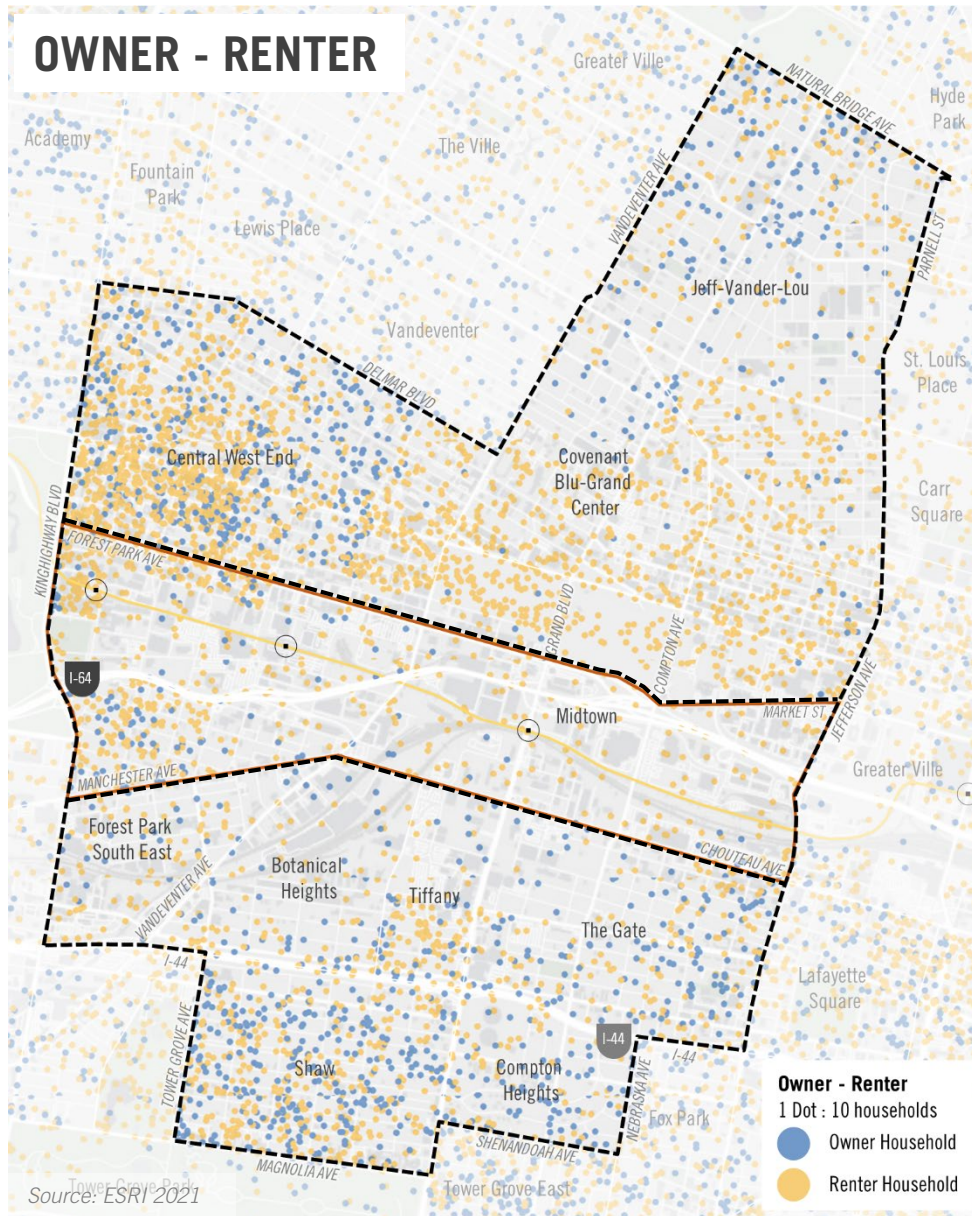
© ESRI, 2021

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

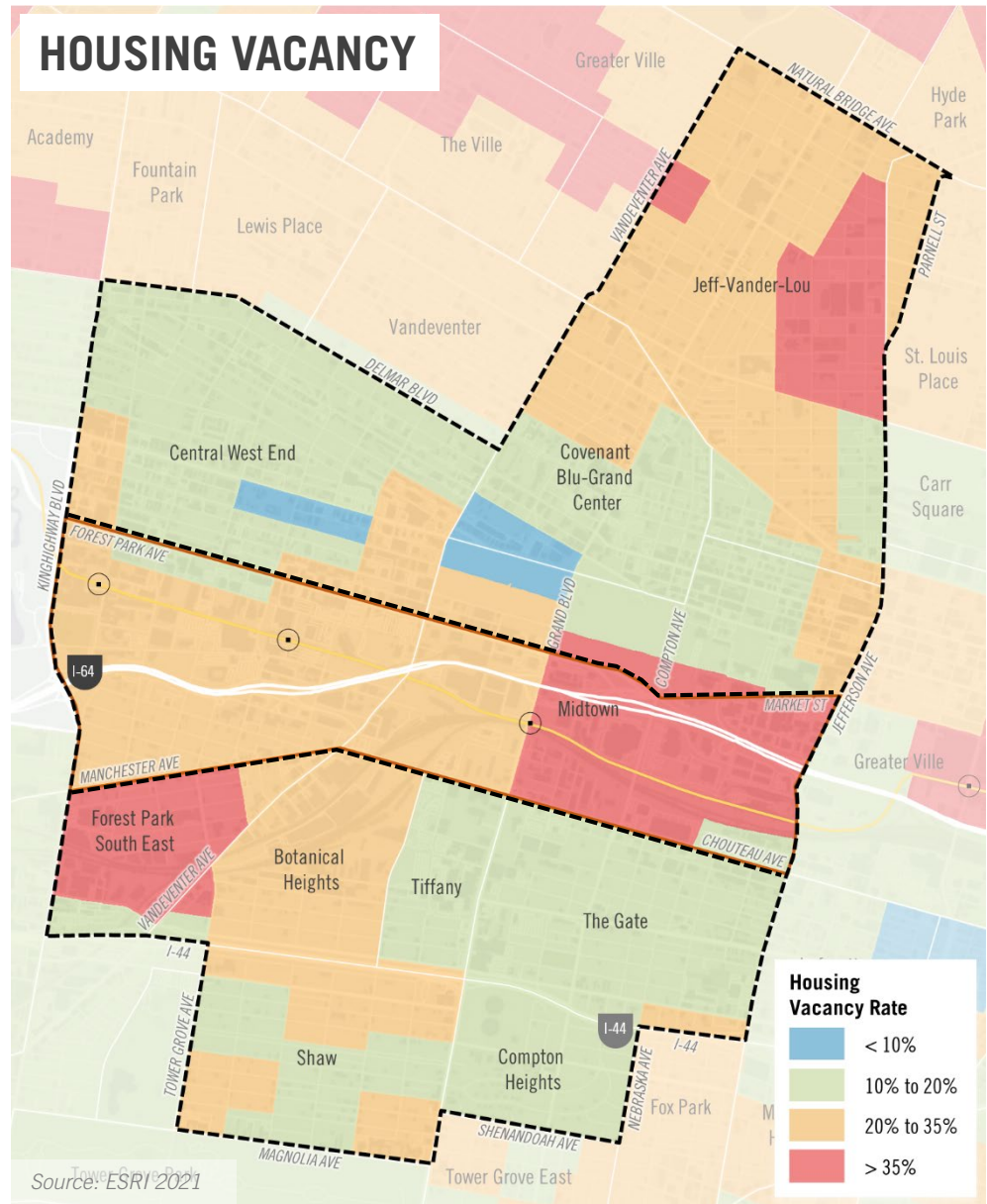
OWNER-RENTER & VACANCY

OWNER - RENTER



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

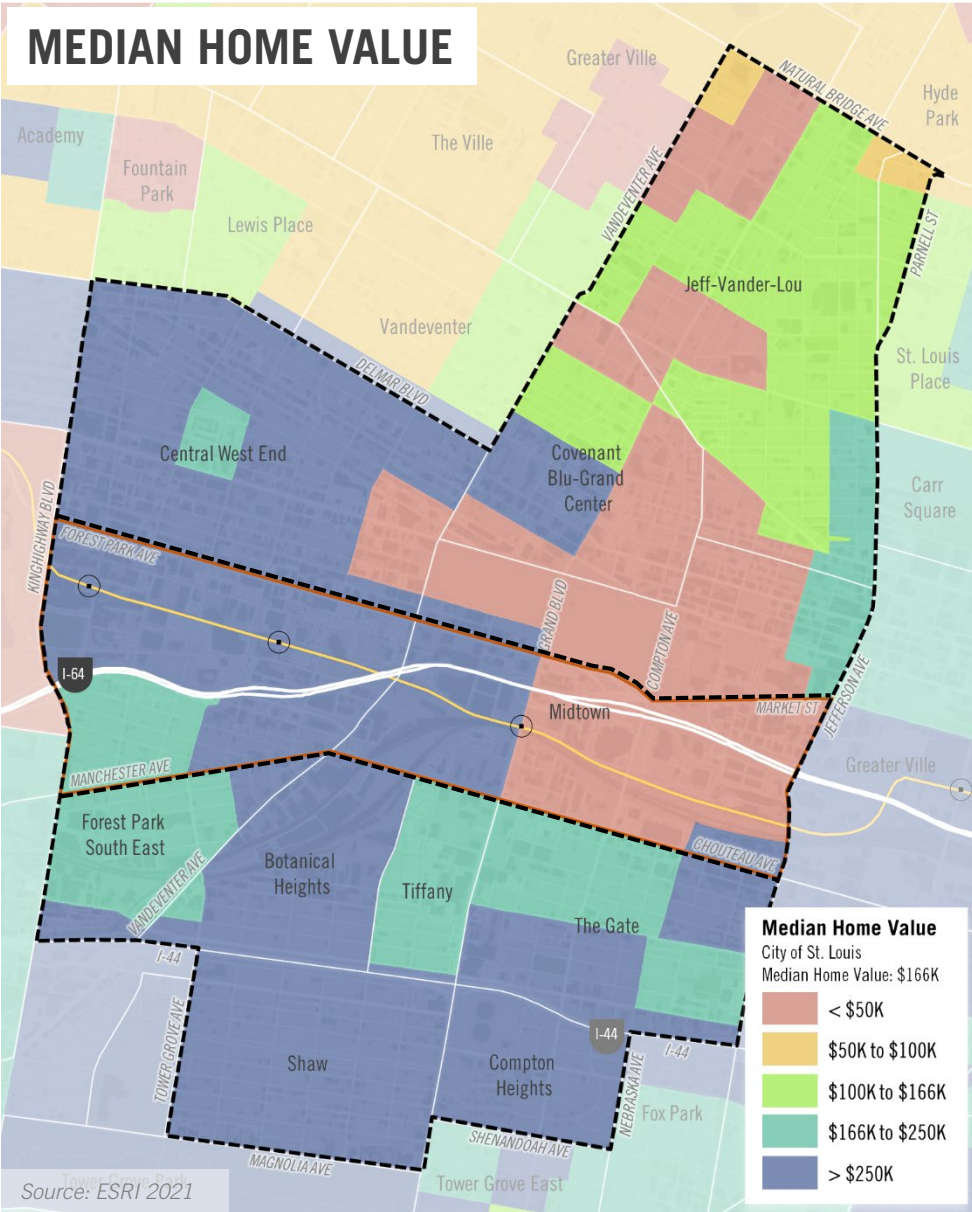


The high vacancy rate in Forest Park South East can be attributed to decades of disinvestment, with the housing stock needing substantial rehabilitation to be marketable. Midtown's high vacancy rate is skewed by its primarily industrial and institutional land uses and sizable renter population.

HOUSING OVERVIEW

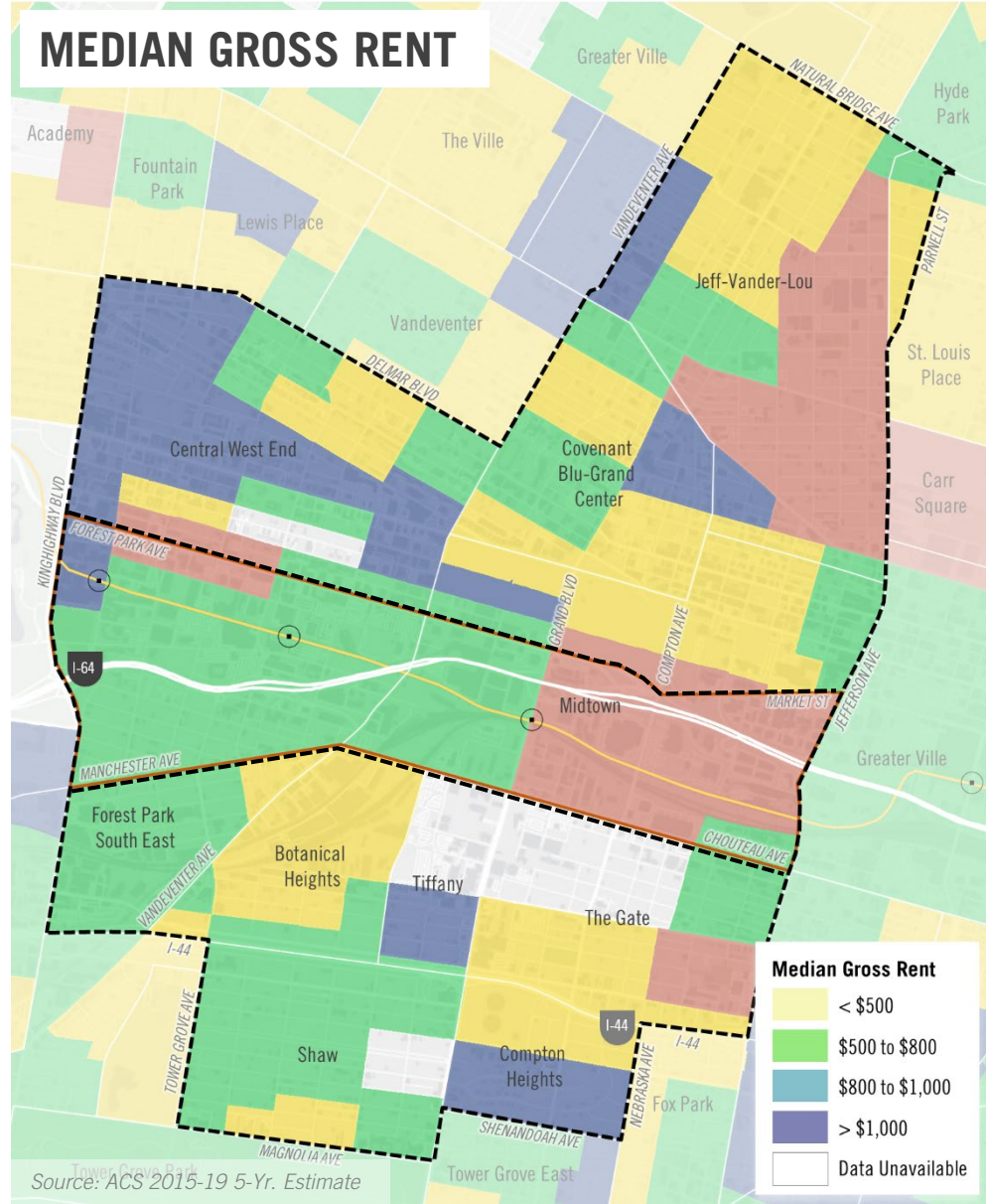
HOME VALUE & RENT

MEDIAN HOME VALUE



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

MEDIAN GROSS RENT

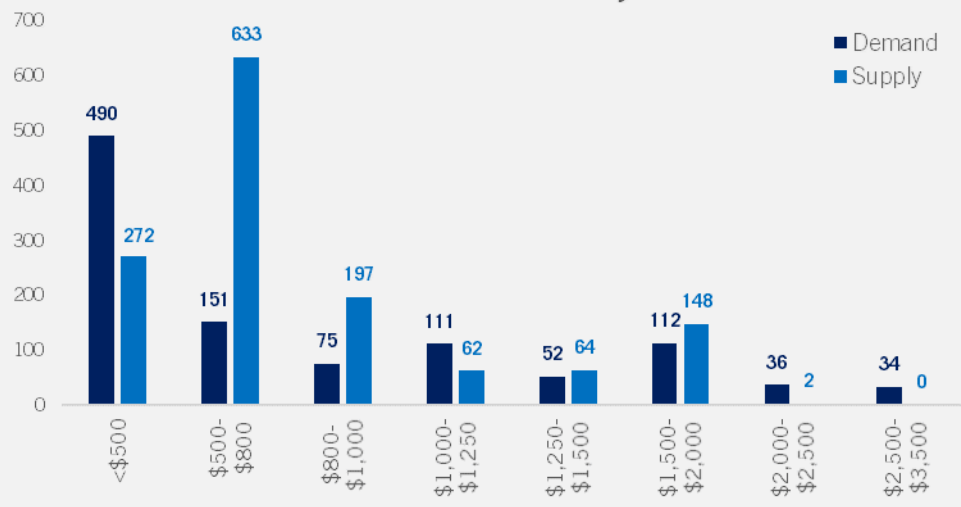


Median gross rents are somewhat consistent with home value with Central West End and Compton Heights achieving the highest rents.

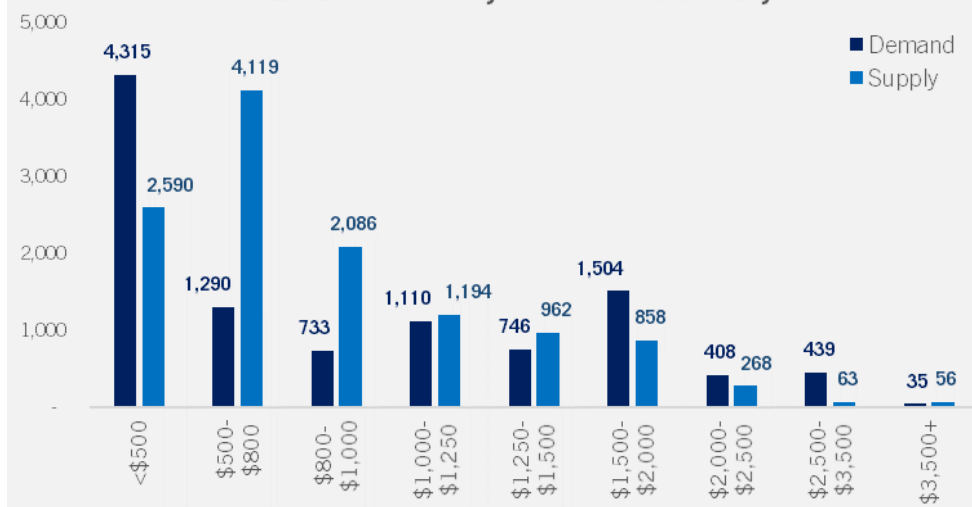
HOUSING OVERVIEW

HOUSING AFFORDABILITY AND VALUE

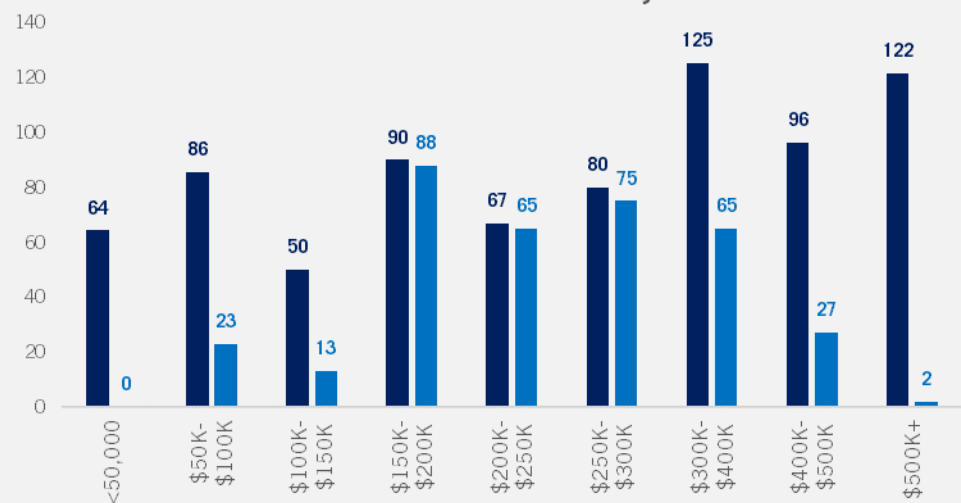
Rental - Tier 2 Boundary



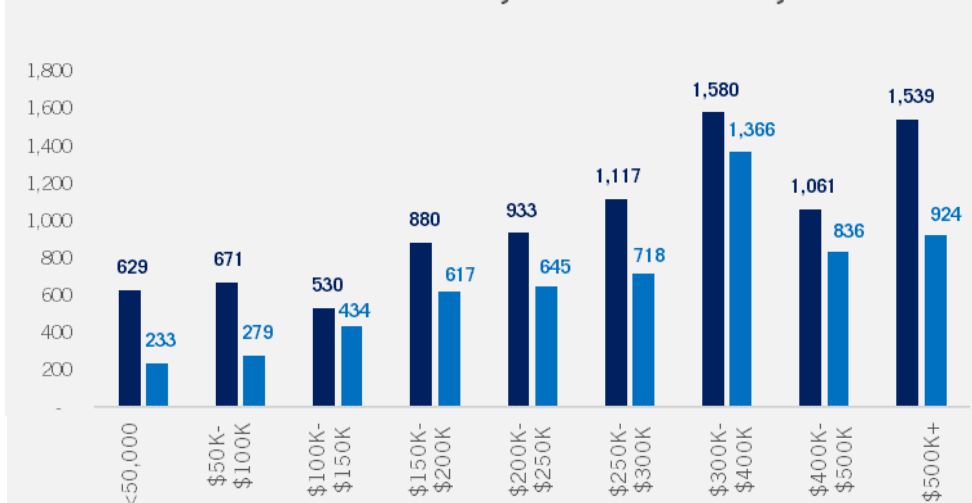
Rental - Community Assessment Boundary



For-Sale - Tier 2 Boundary



For-Sale - Community Assessment Boundary



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.

An aerial photograph of a city grid, likely Chicago, with a blue overlay. The overlay consists of several horizontal bars of varying shades of blue, each containing text. The text is white and bold. The background shows a dense urban landscape with streets, buildings, and some green spaces.

Community Assessment Framework

Introduction to Study Area

Market & Economy

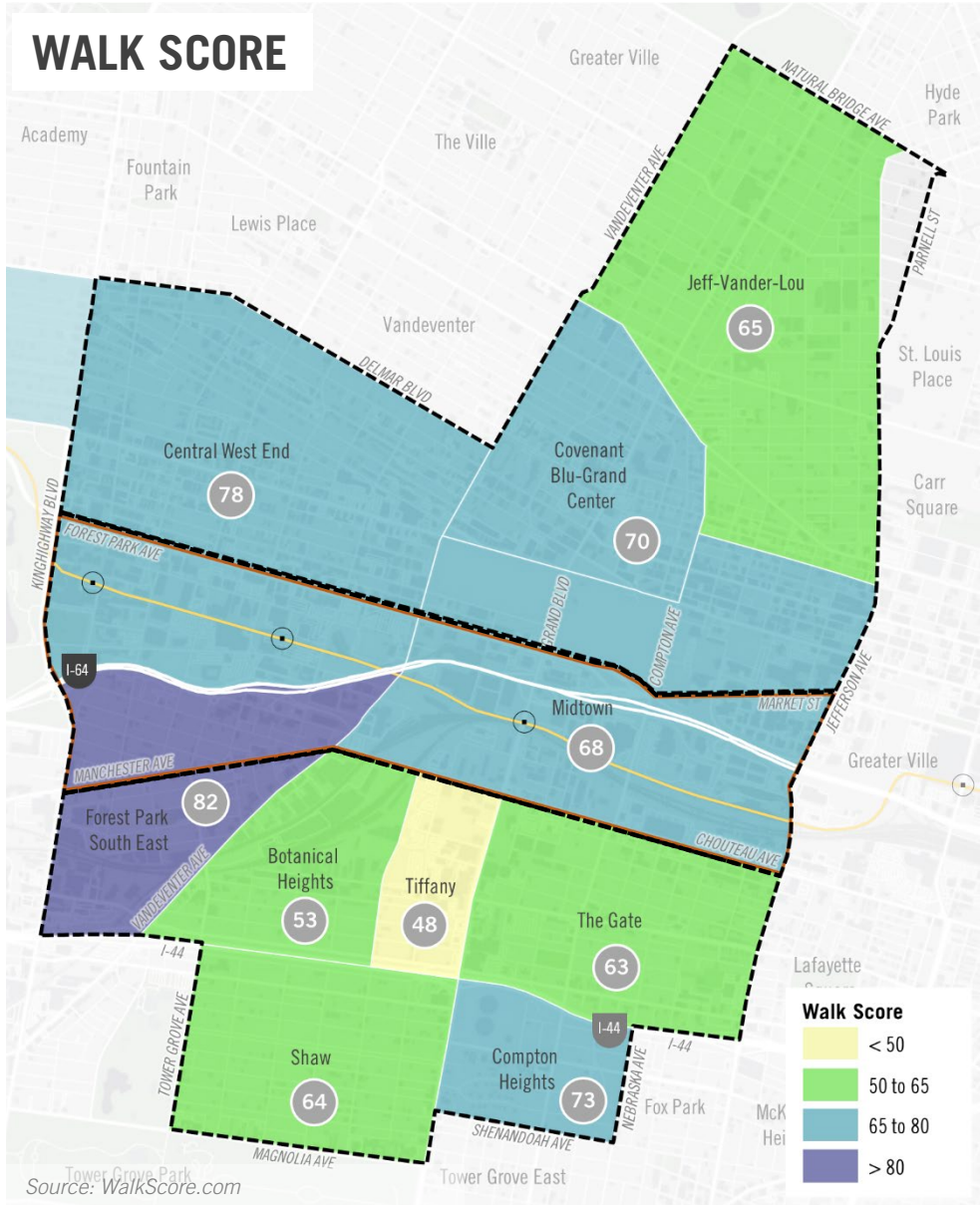
People & Neighborhoods

Transportation Equity

TRANSPORTATION EQUITY

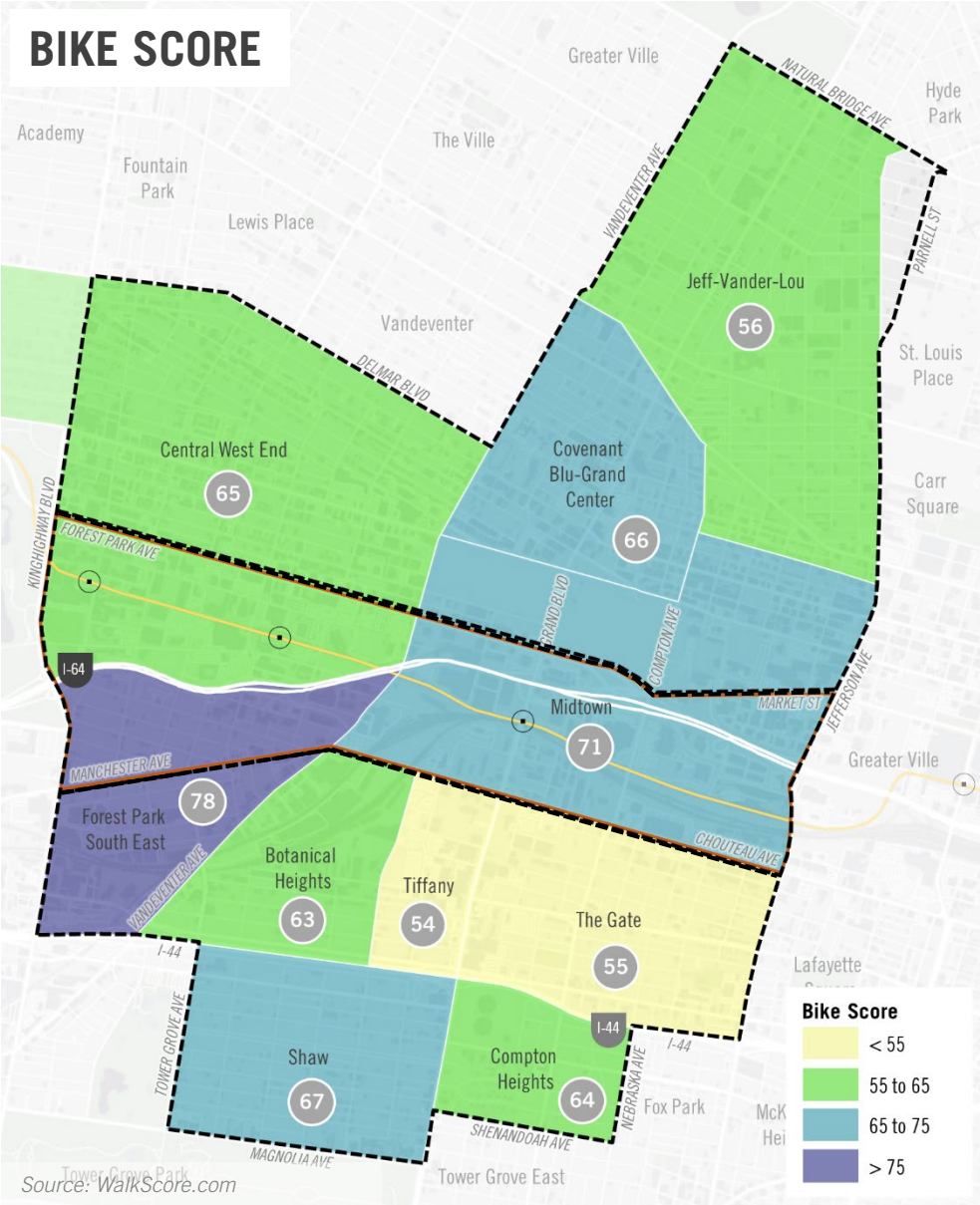
NEIGHBORHOOD WALK SCORE AND BIKE SCORE

WALK SCORE



The walkability of neighborhoods — which considers availability of infrastructure, connectivity, accessibility, and quality of the built environment — varies across the study area.

BIKE SCORE

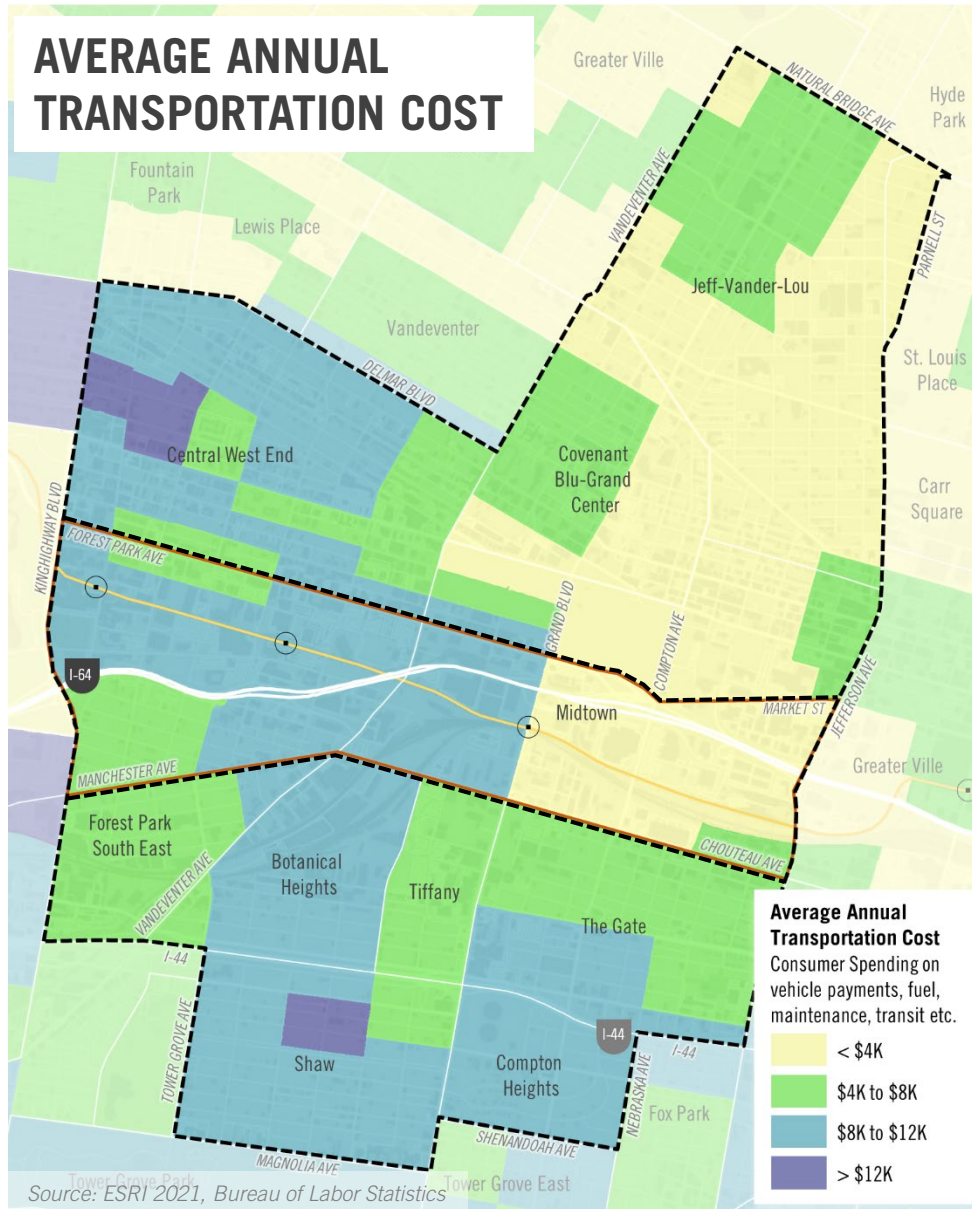


With several projects proposed in the study area, scores measuring active transportation are poised to improve in the coming years.

TRANSPORTATION EQUITY

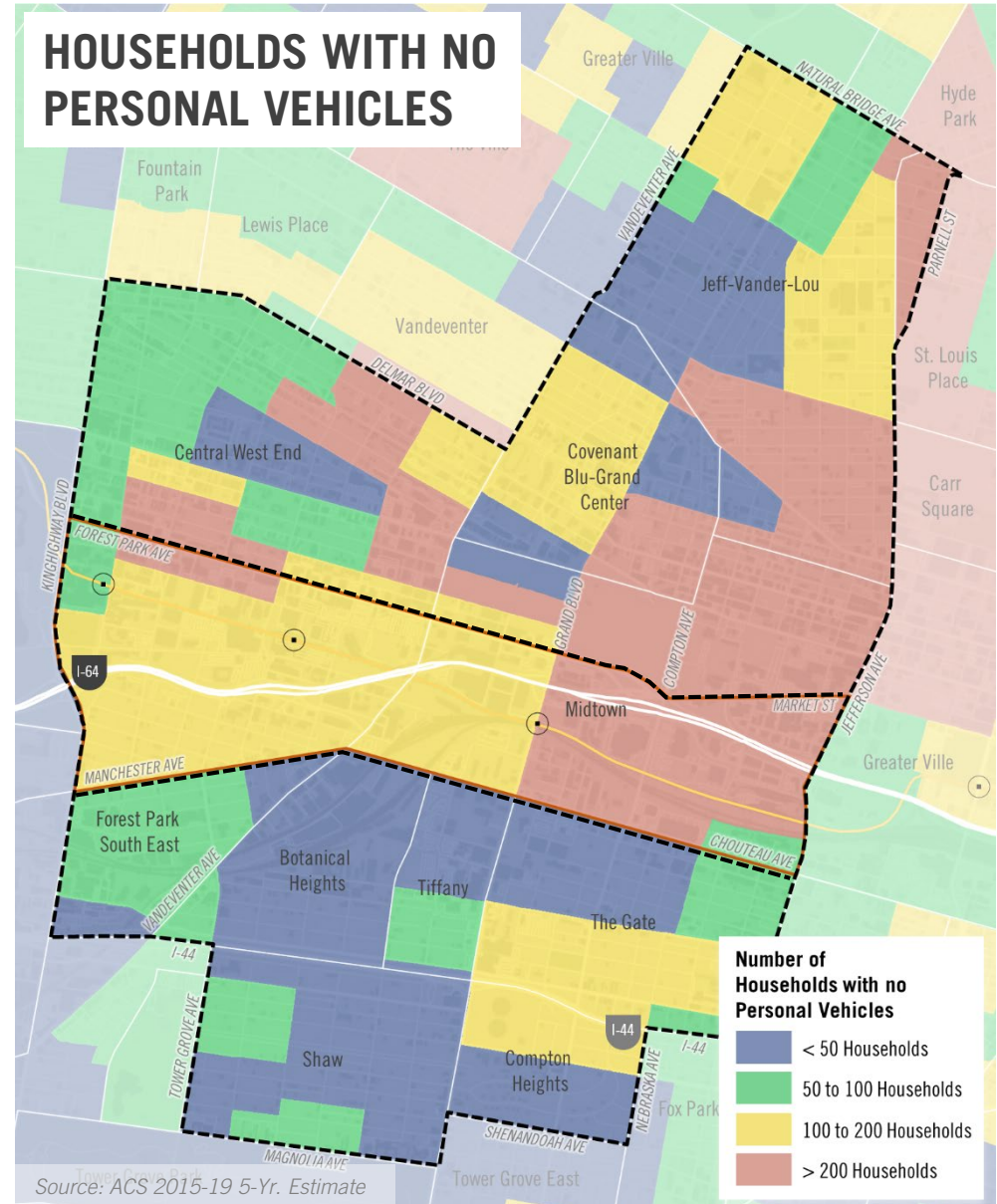
ANNUAL TRANSPORTATION COST & HOUSEHOLDS WITH NO PERSONAL VEHICLES

AVERAGE ANNUAL TRANSPORTATION COST



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

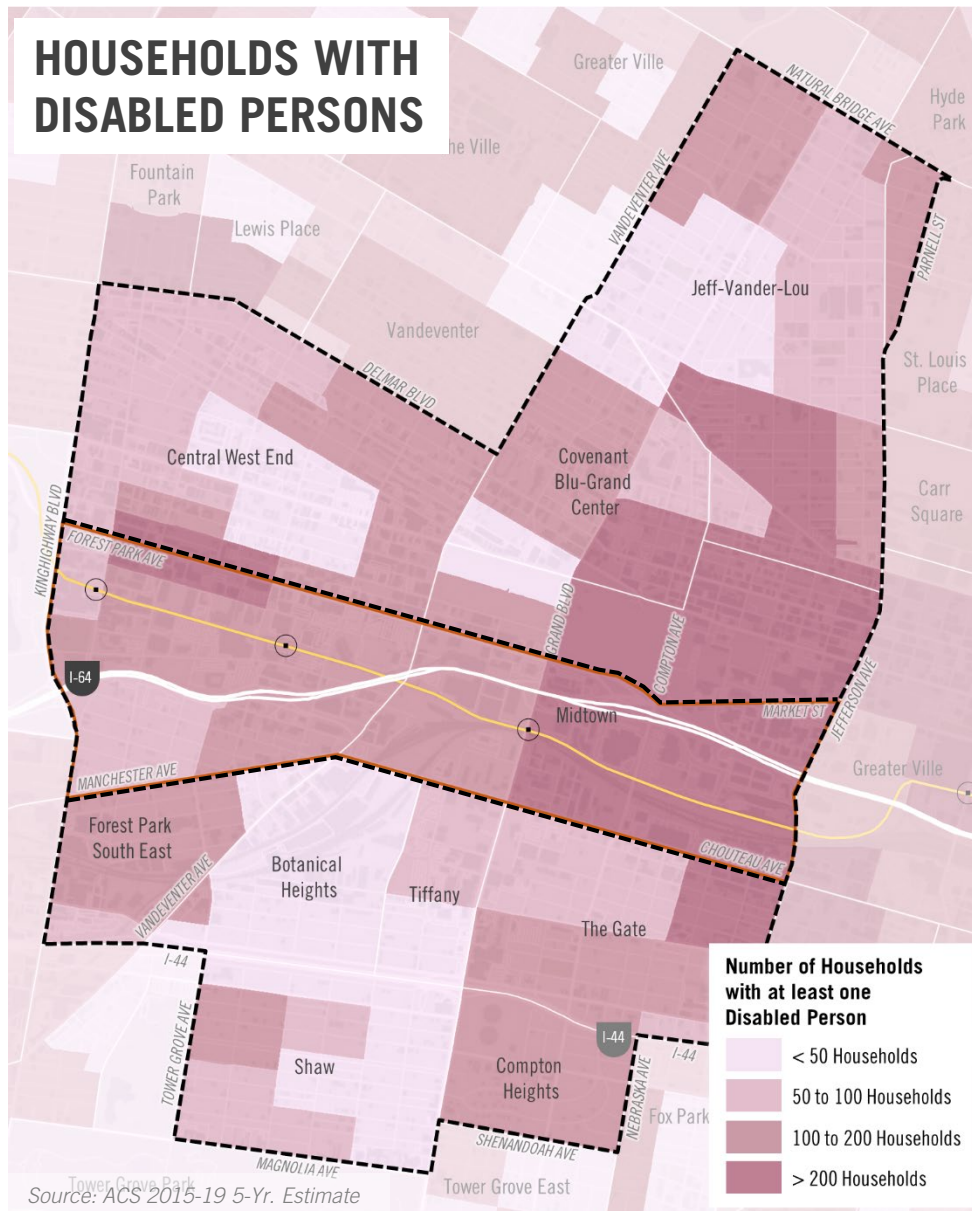


There is a larger concentration of households without a vehicle in the east and northeast portions of the Community Assessment Area given the student population and weaker socio-economic conditions.

TRANSPORTATION EQUITY

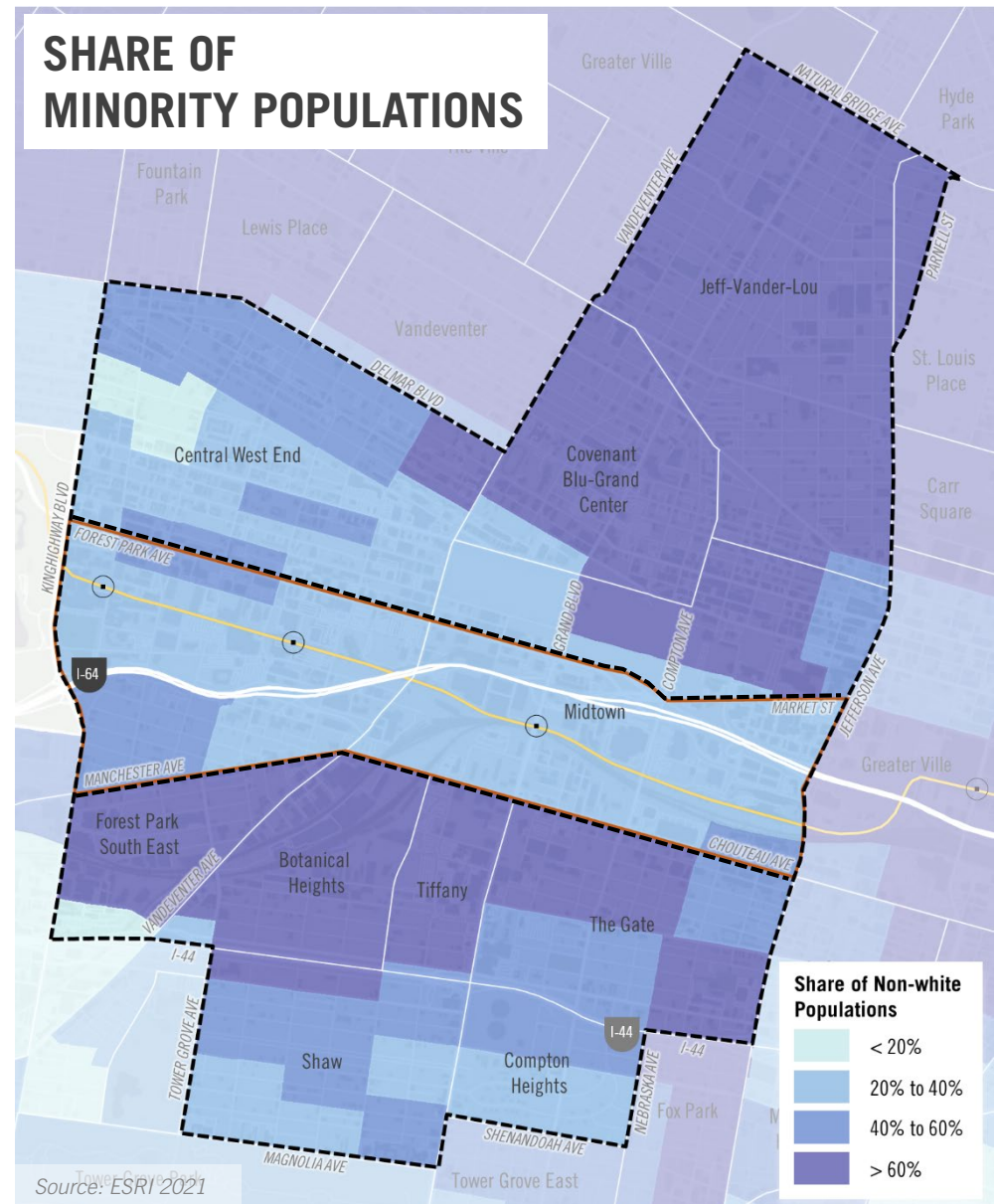
HOUSEHOLDS WITH DISABLED PERSONS & MINORITY POPULATIONS

HOUSEHOLDS WITH DISABLED PERSONS



The distribution of households with disabled persons is generally consistent with the distribution of persons aged 65 and older.

SHARE OF MINORITY POPULATIONS

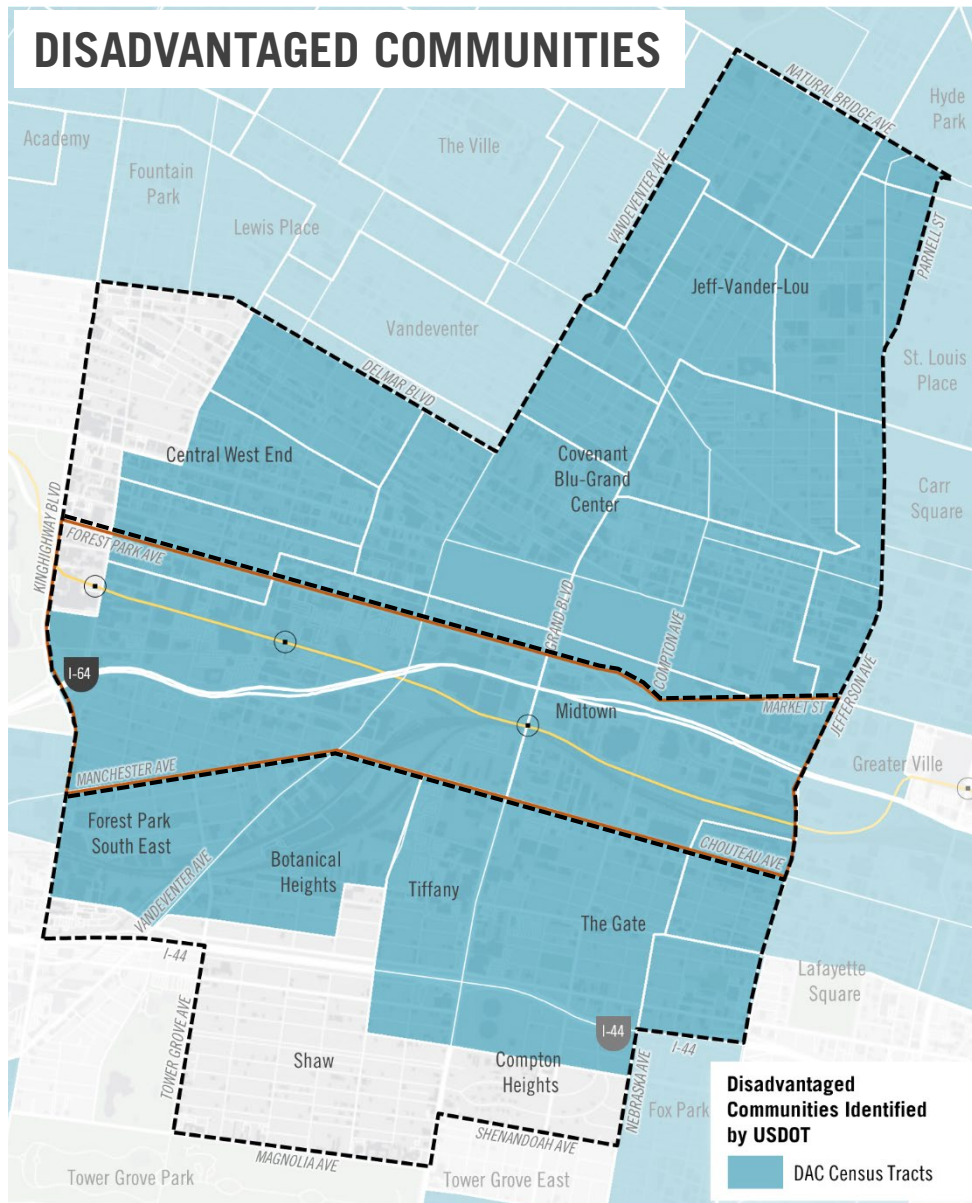


The Tier 2 Study Area and Central West End have relatively low non-white populations with higher concentrations to the south and around Covenant Blu-Grand Center and Jeff-Vander-Lou.

TRANSPORTATION EQUITY

USDOT DEFINED 'DISADVANTAGED COMMUNITIES' (DAC)

DISADVANTAGED COMMUNITIES



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).

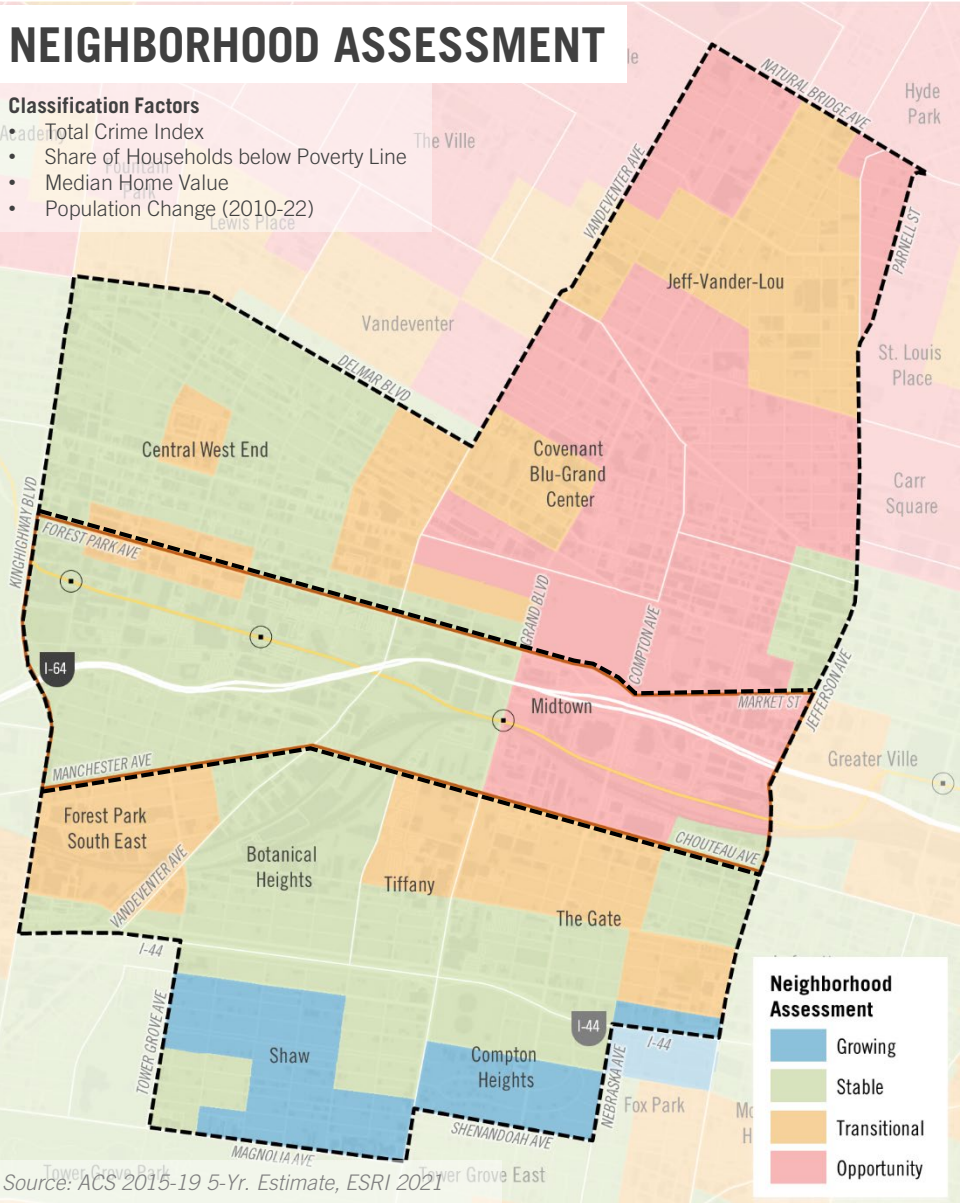
TRANSPORTATION EQUITY

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

TRANSPORTATION EQUITY

COMPOSITE INDICATORS: NEIGHBORHOOD ASSESSMENT



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		Total Crime Index	
(1)	>\$250K	(1)	<100
(2)	\$166K to \$250K	(2)	100 to 250
(3)	\$100K to \$166K	(3)	250 to 400
(4)	\$50K to \$100K	(4)	>400
(5)	<\$50K		
Population Change (2010-22)		Household Share below Poverty Line	
(1)	Gain of >100	(1)	<10%
(2)	Gain of up to 100	(2)	10% to 20%
(3)	Loss of up to 50	(3)	20% to 30%
(4)	Loss of >50 but <140	(4)	>30%
(5)	Loss of >140		

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.

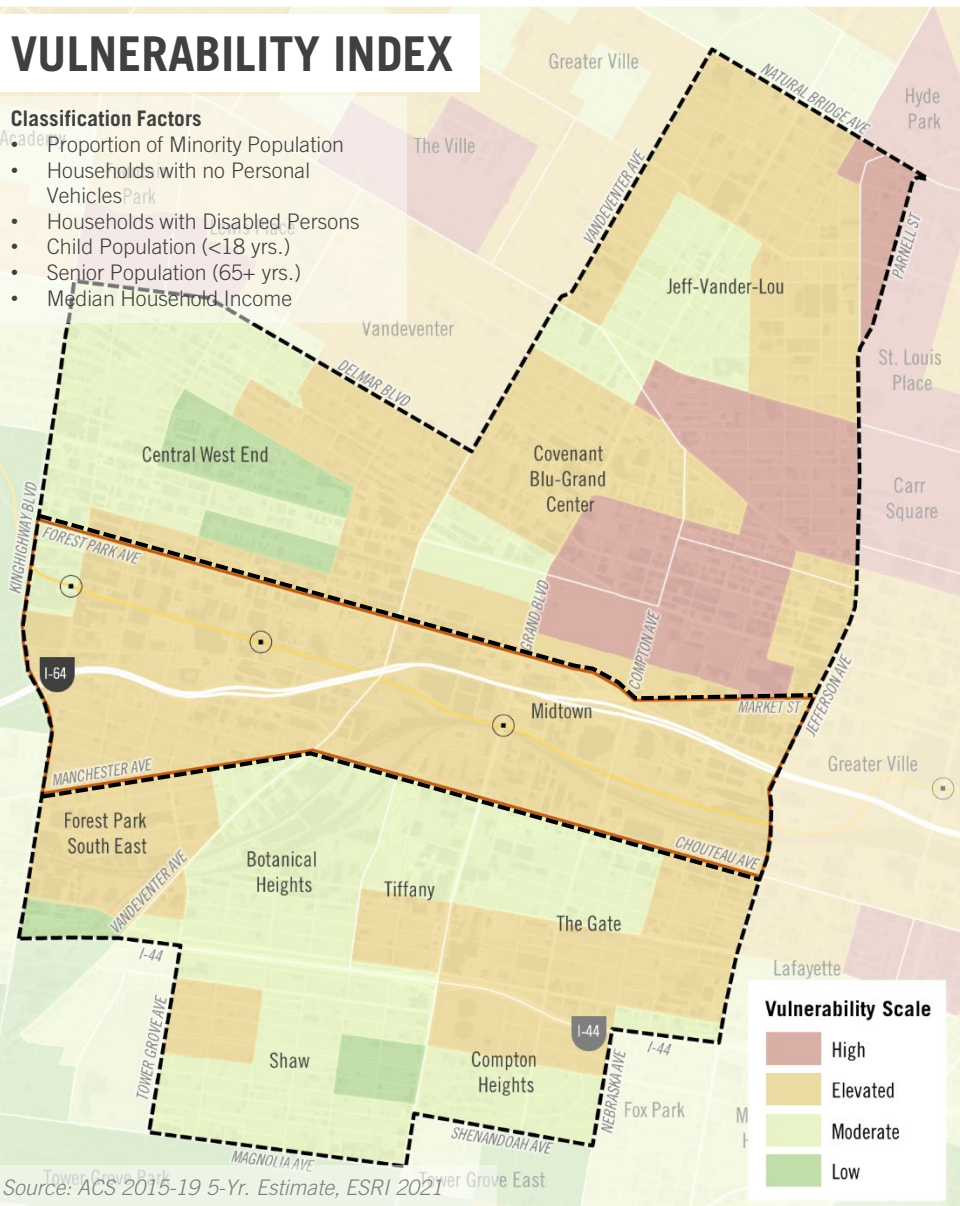
TRANSPORTATION EQUITY

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 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

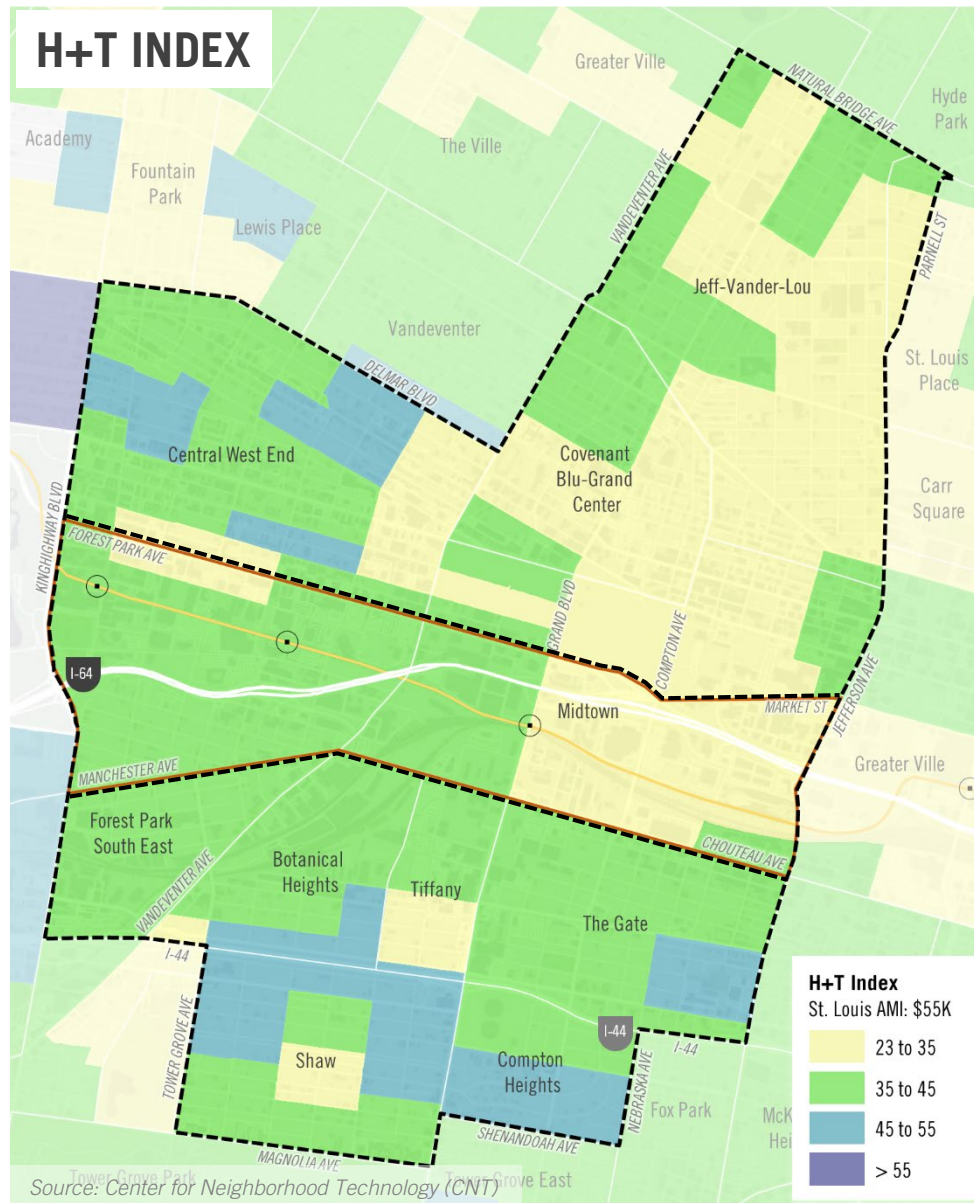
- (1) <50
- (2) 50 to 100
- (3) 100 to 200
- (4) >200

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



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.

An aerial photograph of a city, likely Chicago, showing a dense grid of streets and buildings. The image is overlaid with a semi-transparent blue filter. In the lower right corner, there is a dark blue rectangular box containing white text. The text reads "North - South" on the first line and "Travel Patterns" on the second line.

North - South Travel Patterns

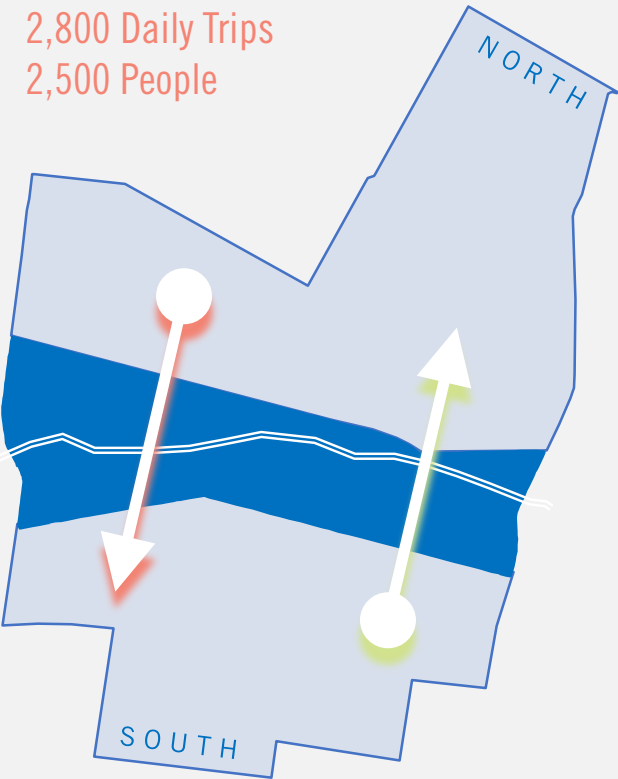
TRAVEL PATTERNS

NORTH – SOUTH TRIPS ON A TYPICAL WEEKDAY

NORTH – SOUTH TRIPS TYPICAL WEEKDAY

CA NORTH -> CA SOUTH

2,800 Daily Trips
2,500 People

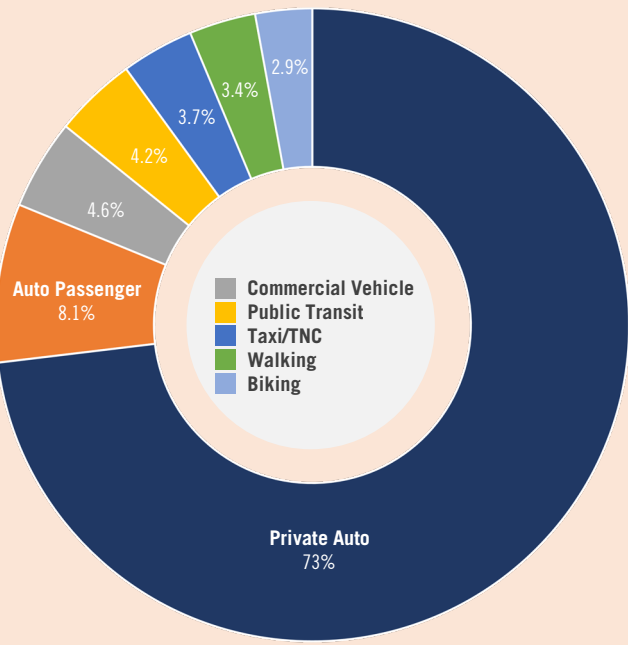


CA SOUTH -> CA NORTH
2,900 Daily Trips
2,600 People

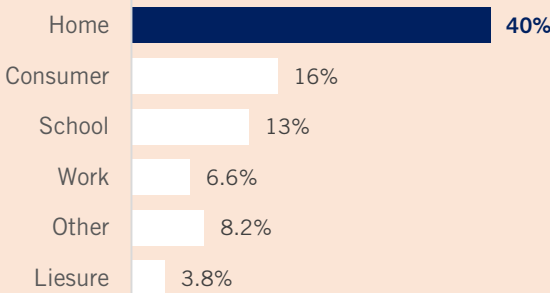
Source: REPLICA, 2021

CA NORTH -> CA SOUTH

Travel Mode

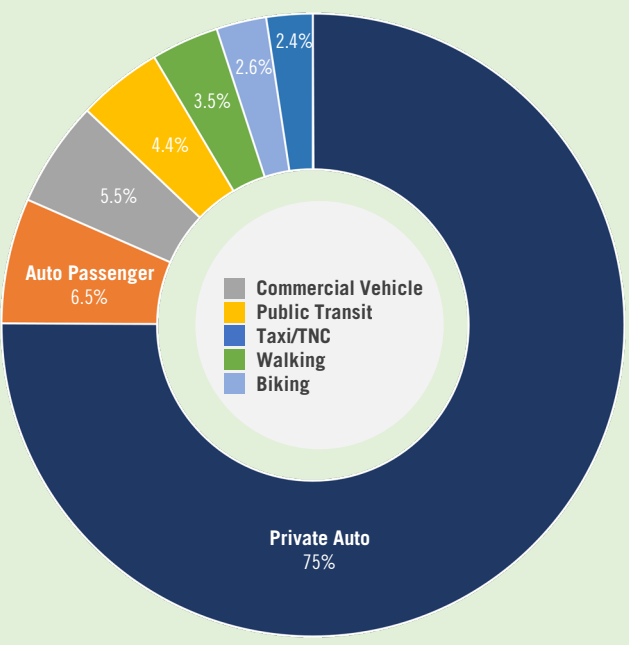


Trip Purpose

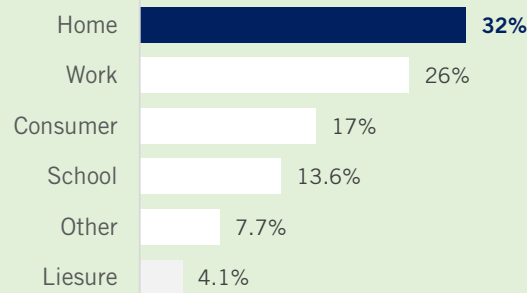


CA SOUTH -> CA NORTH

Travel Mode



Trip Purpose

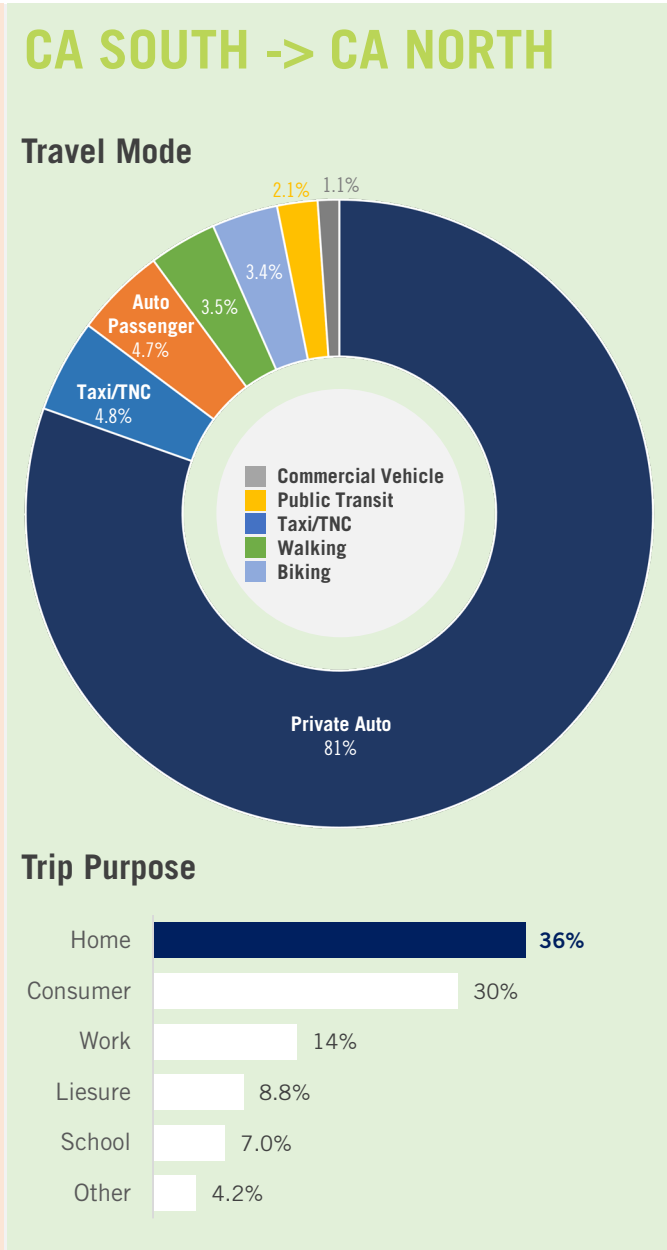
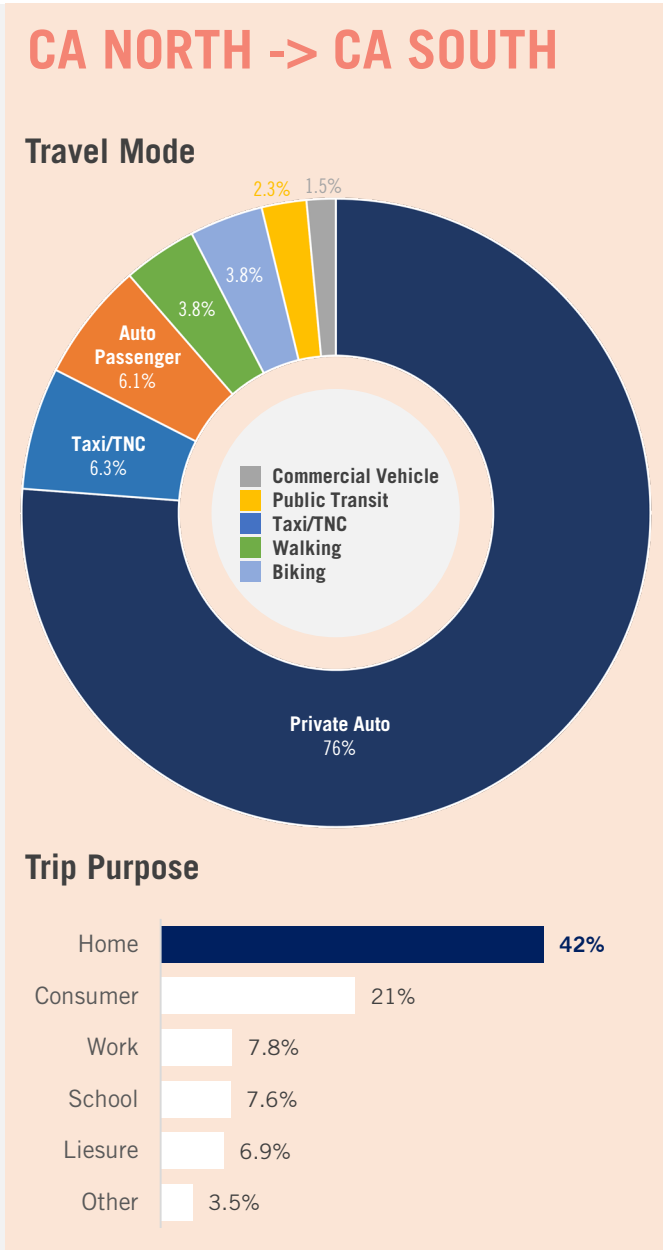
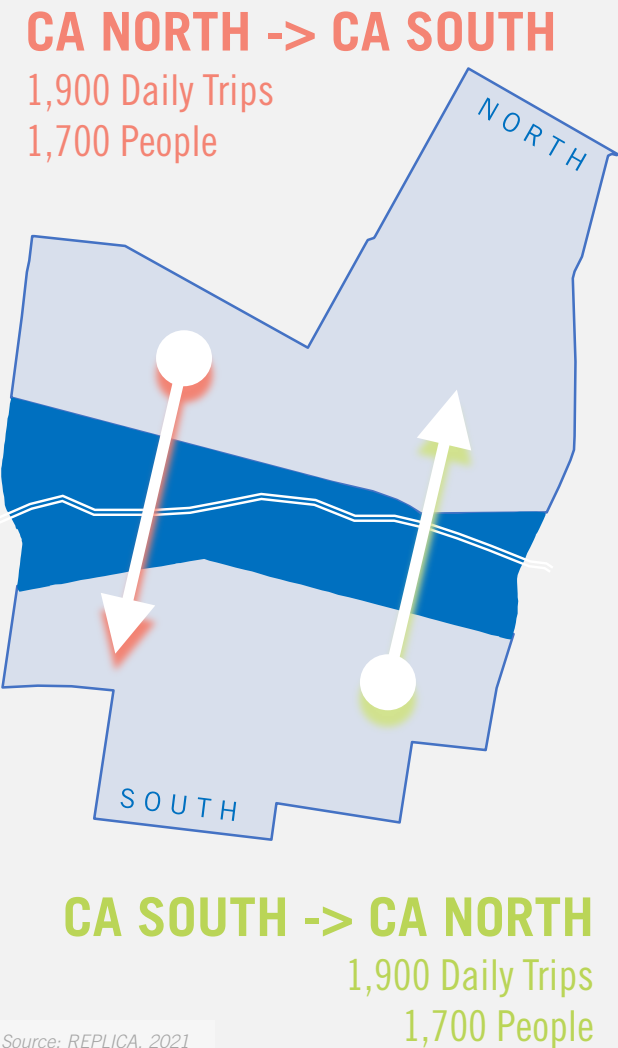


On a typical weekday, trips between the north and south neighborhoods are dominated by private auto, and biking and walking combine for just over 6 percent of the trips.

TRAVEL PATTERNS

NORTH – SOUTH TRIPS ON A TYPICAL WEEKEND

NORTH – SOUTH TRIPS TYPICAL WEEKEND



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.