TECHNICAL MEMORANDUM
COMMUNITY ASSESSMENT BASELINE

Prepared for: Missouri Department of Transportation

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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

Regional and Local Economic Trends *(pages 10-23)*

Industry Clusters *(pages 11, 13-15, 18-21)*

Jobs and Wages *(pages 12-14, 17-21)*

Economic Competitiveness *(pages 15, 17-19, 22-23)*

Real Estate Market Trends *(pages 25-33)*

Economic Development *(pages 35-36)*

PEOPLE AND NEIGHBORHOODS

People and Household Trends *(pages 37 to 49)*

Demographic Overview *(pages 44 to 49)*

Housing Trends and Affordability *(pages 50 to 57)*

Transportation Equity *(pages 58 to 66)*

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
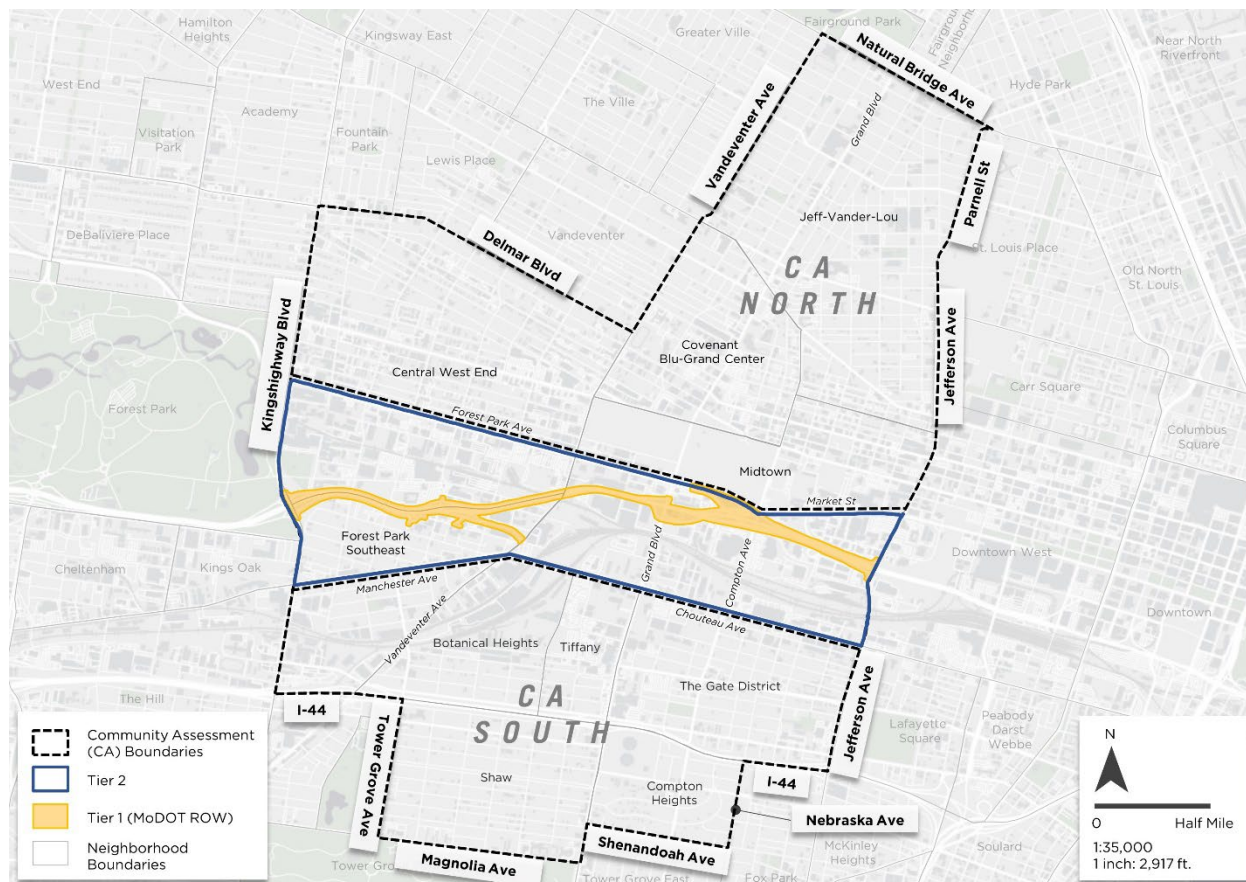
- Tiffany
- The Gate District
- Shaw
- Compton Heights

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)*

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[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