

## **Appendix C**

**ECONOMIC POSITION OF THE  
CITY OF ST. LOUIS AND  
DOWNTOWN ST. LOUIS  
WITHIN  
METROPOLITAN ST. LOUIS  
AND POTENTIALS FOR DOWNTOWN REAL ESTATE DEVELOPMENT  
1990-2005**

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## Metropolitan and Sub-Area Employment Trends and Projections, 1991-2005

Metropolitan St. Louis, consisting of 12 counties in Missouri and Illinois—including the City of St. Louis—employed 1,168,400 people (non-agricultural jobs) in 1991. This was a year which included substantial defense industry downsizing and was in the early throes of a national recession.

By 1997, however, employment had grown substantially to 1,284,800, or up about 10 percent. Projections by the State of Missouri in cooperation with the State of Illinois, indicate further employment growth to 1,385,000 in the year 2005, up another 7.8 percent.

Thus, employment is growing and will continue to do so. But the pace of growth is projected to slow in the coming years.

St. Louis Metropolitan Area			
Geographic Areas of the Metro Area	1991	1997	2005
Entire Metro Area	1,168,400	1,284,800	1,385,000
Metro East/Illinois	199,800	238,800	277,000
Metro West/Missouri	968,600	1,046,000	1,148,600
St. Louis County	562,700	620,400	675,200
Manchester/S.W.	55,700	61,800	67,500
South	60,700	69,100	77,400
Clayton/Mid-County	128,700	140,500	150,900
Airport/North	105,400	99,400	111,400
Far North	23,100	26,500	29,000
Bridgeton/N.W.	70,600	77,400	81,000
Olive/Westport	90,000	112,000	118,200
Chesterfield/Hwy 40	28,500	33,700	39,800
City of St. Louis	270,400	255,600	227,400
DOWNTOWN	92,400	88,100	83,300
Remainder of City	178,000	167,500	136,000
Remainder of Metro West	135,500	170,000	246,000

Sources: Missouri Division of Employment Security, St. Louis County Department of Planning, St. Louis Downtown Partnership, Development Strategies.

Within this overall growth pattern, there are numerous internal shifts occurring. Key among them has been and may continue to be declines in the number of jobs in the City of St. Louis, including the downtown area. While downtown job counts are, at best, good estimates, it is clear that the job trends are negative—barring future actions to bolster the downtown and city as more favorable locations for employing establishments.

The shifts, however, suggest that job *declines* will be generally isolated in the City itself. In the various areas shown on the above table, all are expected to increase in employment, including many of the older and more settled parts of St. Louis County. St. Louis County continues to be the principal location of jobs in the region (48 percent of all metro jobs are in the County). Continued growth in the County is attributable to its excellent location and infrastructure and the diversity of high quality locations coupled with aggressive economic development actions.

Likewise, job growth in Metro East is projected. Superior infrastructure systems, principally in the form of highways, make Metro East a strong contender for capturing regional growth. In the same way, the "collar counties" of Metro West have advantages encouraging job growth. Most importantly, these include

residential growth which far outpaces the rest of the region (including Metro East) and, therefore, encourages employers to follow.

**Demographic Trends**

The St. Louis metropolitan area has experienced only modest population gains over the past several years. In fact, population growth rates trail employment growth rates as a higher and higher proportion of the population has been finding jobs. Based on local estimates and projections, the regional population increased from 2,493,600 in 1990 to 2,576,500 in 1998, for an overall growth rate of 4.4 percent (while employment increased about 10 percent between 1990 and 1997 alone). During this period, natural increase has been the chief cause of population increase while the region has experienced net out-migration of existing residents. This latter factor, however, has diminished over the decade such that there has actually been very slight in-migration since about 1994 although the net effect since 1990 is still negative.

**Table 2  
Population Of The St. Louis Metropolitan Area, 1980-2000**

Jurisdiction	Census 1980	Census 1990	Estimate 1998	Forecast 2000
St. Louis City	453,100	396,700	351,000	341,300
St. Louis County	973,900	993,500	1,010,500	1,014,000
St. Charles County	144,100	212,900	266,900	281,500
Jefferson County	146,200	171,400	192,600	196,700
Franklin County	71,200	80,600	90,500	93,000
Lincoln County	22,200	28,900	34,500	36,700
Warren County	14,900	19,500	23,600	24,800
Sullivan in Crawford Co.		1,000	1,200	1,300
<b>METRO WEST</b>	<b>1,825,600</b>	<b>1,904,500</b>	<b>1,970,800</b>	<b>1,989,300</b>
Clinton County	32,600	33,900	35,500	35,900
Jersey County	20,500	20,500	21,600	22,200
Madison County	247,700	249,200	256,600	258,300
Monroe County	20,100	22,400	25,700	27,400
St. Clair County	267,500	262,900	266,300	269,000
<b>METRO EAST</b>	<b>588,400</b>	<b>588,900</b>	<b>605,700</b>	<b>612,800</b>
<b>METRO AREA</b>	<b>2,414,000</b>	<b>2,493,400</b>	<b>2,576,500</b>	<b>2,602,100</b>

Source: St. Louis Metropolitan Census Committee, Population Estimates Subcommittee, of the St. Louis Chapter of the American Statistical Association.

Despite slow population growth, the St. Louis area is experiencing substantial intra-regional shifts in population. Most of the gains are occurring to the west and south of the City of St. Louis, particularly in St. Charles County but also in Jefferson and St. Louis Counties. These three counties, in fact, accounted for 111 percent of the net growth in the region between 1990 and 1998.

The City of St. Louis, on the other hand, lost 45,700 residents between 1990 and 1998 (down 11.5%), the only county-level jurisdiction to lose population, and was clearly the source of much of the population shifting to the outlying counties. Some of the difficulty in projecting potential *employment* growth for the City, therefore, lies partly in the inability of the City to retain a resident population base.

Still, there are only two counties in the region which are "net job gainers" every day: St. Louis County and the City of St. Louis. Latest available cross-tabulated figures for these two are for 1995 when St. Louis County had 39,300 *more* jobs located within its borders than it had residents with jobs. The City of St. Louis had 112,500 *more* jobs than residents with jobs. In short, the other counties are "net bedroom communities" while St. Louis City and County are the major job centers relative to their populations.

Thus, the City of St. Louis is able to retain a strong job/economic base even in the face of population and employment decline. Whether this can continue has to be raised as an important issue, however, given the rate of both population and job declines in the City of St. Louis.

### **Strongest Historic Employment Growth Sectors for Metropolitan St. Louis**

Before embarking on a projection of the employment and floor area growth potentials for downtown St. Louis, it is important to understand which sectors of the economy create the most jobs for the regional/metropolitan economy and whether these sectors represent significant sources of future growth, especially for downtown. The tables in this section, however, reflect only the Missouri portion of the metropolitan area due to limited availability of county-level SIC data (Illinois county data and SIC-based data are very hard to obtain in a timely manner). Thus, the term *metropolitan* in the following analysis refers only to the six counties and the City of St. Louis in Missouri.

Table 3 highlights the 30 sectors (based on 3-digit Standard Industrial Classification Codes) which showed the greatest *increase in number of jobs* in the metropolitan area between 1990 and 1997. Together, these 30 sectors added over 91,500 jobs to the Missouri/metropolitan economy during a period when only 60,100 net jobs were added. All other sectors, therefore, accounted for a net loss of some 31,300 jobs.

Leading the list of thirty is the *amusement and recreation* sector, adding nearly 8,650 jobs. This is a sector bolstered primarily by the emergence of the gaming industry in greater St. Louis since 1990. In Missouri alone, there are three key locations for gaming boats: downtown St. Louis, Maryland Heights in northwest St. Louis County, and the City of St. Charles. (There are also two boats in Illinois—Alton and East St. Louis.)

*Private elementary and secondary schools* was also a major growth sector, adding about 8,400 jobs. *Personnel supply services* (such as temporary agencies) and *computer and data processing services* round out the top four with about 8,000 and 6,600 additional jobs each.

At the bottom of the list, but still with strong growth are *commercial banks*, which have a major presence in Downtown St. Louis, and *services to dwellings and other buildings*, again a sector which can have a major importance for downtown where many large buildings need routine maintenance.

**Table 3**  
**Strongest Historic Growth Sectors - St. Louis Metro Area, 1990-1997**

Missouri Portion of Metro Area					
Top 30 by Numerical Job Growth - Metro Area					
SIC	Sector Description	Metro Area (Missouri Side Only)			
		1990	1997	Job Growth	Pct. Growth
All	Total Jobs	986,456	1,046,565	60,109	6.1%
799	Misc. Amusement & Recreation Services	12,374	21,020	8,646	69.9%
821	Elementary & Secondary Schools (Pvt.)	24,713	33,121	8,408	34.0%
736	Personnel Supply Services	17,915	25,942	8,027	44.8%
737	Computer & Data Proc. Svcs.	7,459	14,050	6,591	88.4%
581	Eating & Drinking Places	65,865	71,449	5,584	8.5%
874	Management & Public Relations	4,414	9,584	5,170	117.1%
822	College and Universities	19,208	23,866	4,658	24.3%
451	Air Transportation, Scheduled	10,378	14,957	4,579	44.1%
808	Home Health Care Services	2,828	6,607	3,779	133.6%
809	Health & Allied Services, Nec	2,111	4,943	2,832	134.2%
621	Security Brokers & Dealers	5,169	7,869	2,700	52.2%
801	Offices of Physicians	10,769	13,073	2,304	21.4%
836	Residential Care	5,432	7,692	2,260	41.6%
835	Child Day Care Services	3,676	5,906	2,230	60.7%
805	Nursing & Personal Care Facilities	14,140	16,200	2,060	14.6%
871	Engineering & Architectural Services	7,216	9,065	1,849	25.6%
832	Individual & Family Social Services	4,696	6,460	1,764	37.6%
751	Auto Rentals, Leasing W/O Drivers	1,791	3,505	1,714	95.7%
804	Offices Of Other Health Practitioners	2,404	4,067	1,663	69.2%
173	Electrical Work	4,518	6,114	1,596	35.3%
632	Medical Service & Health Insurance	2,473	4,040	1,567	63.4%
596	Nonstore Retailers	1,437	2,879	1,442	100.3%
531	Department Stores	23,327	24,768	1,441	6.2%
922	Public Order and Safety	9,919	11,223	1,304	13.1%
738	Miscellaneous Business Services	12,049	13,332	1,283	10.6%
171	Plumbing, Heating, Air Conditioning	6,634	7,901	1,267	19.1%
162	Heavy Construction, Ex Highways	2,232	3,443	1,211	54.3%
175	Carpentering & Flooring	2,453	3,663	1,210	49.3%
602	Commercial Banks	12,300	13,509	1,209	9.8%
734	Services To Dwellings & Other Bldgs.	9,166	10,332	1,166	12.7%
	Total, top 30	309,066	400,580	91,514	29.6%
	All other sectors	677,390	645,985	-31,405	-4.6%

Sources: Missouri Division of Employment Security and Development Strategies.

There is a number of sectors on the above list which may not have important relevance for attracting downtown businesses. These include, for instance, the construction industry sectors of *heavy construction, electrical work, carpentering and flooring, and plumbing, heating, and air conditioning*. Such firms tend to need larger sites for equipment storage in not-so-dense locations. Likewise, some of the social and health service sectors might be inappropriate but, given these sectors' needs for office/clinic space and the diversity of downtown employment and residential populations, such sectors may, indeed, be attracted to a downtown location. It is interesting, also, that elementary and secondary schools are on

the list as well as colleges and universities. A potential theme for downtown St. Louis is to be a center of education. If there is growth in these sectors, downtown might be able to capture an important share.

Next, we shift to the City's performance in these top 30 sectors (Table 4). Despite major job losses in the City between 1990 and 1997 of almost 24,000, these particular sectors, when taken as a whole, have proven to be assets for the City as well as the region. Of the 30 sectors, 23 showed job growth in the City with net job gains among all 30 of almost 11,300.

**Table 4**  
**Strongest Historic Growth Sectors - St. Louis Metro Area, 1990-1997**

City of St. Louis Numbers within Metro Area Rankings

Top 30 by Numerical Job Growth - Metro Area

SIC	Sector Description	St. Louis City			
		1990	1997	Job Growth	Pct. Growth
All	Total Jobs	279,466	255,623	(23,843)	-8.5%
799	Misc. Amusement & Recreation Services	1,099	2,863	1,764	160.5%
821	Elementary & Secondary Schools	3,670	5,398	1,728	47.1%
736	Personnel Supply Services	3,512	4,833	1,321	37.6%
737	Computer & Data Proc. Svcs.	612	1,076	464	75.8%
581	Eating & Drinking Places	15,170	13,635	(1,535)	-10.1%
874	Management & Public Relations	1,105	1,313	208	18.8%
822	College and Universities	5,285	6,044	759	14.4%
451	Air Transportation, Scheduled	146	1,759	1,613	1104.8%
808	Home Health Care Services	764	545	(219)	-28.7%
809	Health & Allied Services, Nec	548	1,635	1,087	198.4%
621	Security Brokers & Dealers	2,684	3,903	1,219	45.4%
801	Offices of Physicians	1,923	2,136	213	11.1%
836	Residential Care	1,037	1,254	217	20.9%
835	Child Day Care Services	533	1,156	623	116.9%
805	Nursing & Personal Care Facilities	3,038	3,121	83	2.7%
871	Engineering & Architectural Services	1,805	1,992	187	10.4%
832	Individual & Family Social Services	2,472	2,865	393	15.9%
751	Auto Rentals, Leasing W/O Drivers	128	116	(12)	-9.4%
804	Offices Of Other Health Practitioners	282	262	(20)	-7.1%
173	Electrical Work	1,394	1,583	189	13.6%
632	Medical Service & Health Insurance	1,654	1,457	(197)	-11.9%
596	Nonstore Retailers	274	355	81	29.6%
531	Department Stores	3,744	3,900	156	4.2%
922	Public Order and Safety	4,338	4,662	324	7.5%
738	Miscellaneous Business Services	3,942	4,172	230	5.8%
171	Plumbing, Heating, Air Conditioning	1,423	1,078	(345)	-24.2%
162	Heavy Construction, Ex Highways	214	181	(33)	-15.4%
175	Carpentering & Flooring	237	376	139	58.6%
602	Commercial Banks	6,075	6,918	843	13.9%
734	Services To Dwellings & Other Bldgs.	4,759	4,539	(220)	-4.6%
	Total, top 30	73,867	85,127	11,260	15.2%
	All other sectors	205,599	170,496	-35,103	-17.1%

Sources: Missouri Division of Employment Security and Development Strategies.

This means, of course, that all other sectors—which, on net, lost jobs throughout the region—lost in the city, a net loss, in fact, of some 35,100 jobs from the city alone. Thus, the top 30 for the region are

potentially "bright stars" also for the city but it may take more than working within these promising sectors to substantially improve the prospects for City growth.

Chief among the gainers in the City are *amusement and recreation services*, adding 1,764 jobs (again, gaming, but also job gains can be attributed to the TWA Dome and Kiel Center, both of which began downtown operations since 1990). The City also benefited in the *air transportation* sector when it attracted TWA's headquarters and added a net of 1,759 jobs in the City.

Another strong gainer for the City was the *security brokers* sector, adding 1,219 jobs. Large and internationally successful firms like A.G. Edwards contribute most to this growth and are very important sectors for downtown St. Louis. The strength of the national economy and, in particular, the stock markets also contribute to this growth.

Thus, the City has been sharing, although not proportionally, in the region's growth in the 30 sectors that added the most jobs during the 1990s. Of the overall metropolitan gain, St. Louis City captured 12.3 percent. Unfortunately, the City's share of all jobs in the Missouri part of the metro area is closer to 25 percent, so the City is not gaining its "fair share" of such growth.

It is also important to note that the net job loss from all other sectors in the City (down 35,100) exceeded the net job loss for the metro area as a whole (down 31,400). Projections for future growth and job capture, therefore, are handicapped by these recent and powerful trends.

#### **Strongest Historic Employment Growth Rates for Metropolitan St. Louis**

While the above analysis covered those sectors with the strongest *number* of job gains, it is also important to look at those sectors with the fastest *rates* of gain—or percentage changes between 1990 and 1997. Table 5 lists the top 30 *growth rate* sectors for the Missouri part of the metropolitan area. These are not necessarily the same as the previous list.

Together, these 30 fastest growth rate sectors had a weighted rate of gain of 94.4 percent between 1990 and 1997 in the metro area compared to an overall growth rate of 6.1 percent for all jobs. This means that all other sectors of the economy grew at a net rate of just 2.1 percent. These top 30 growth rate sectors added two thirds of all net job growth in the region with 40,750 new jobs of the total net gain of 60,100 jobs. Keep in mind, however, that the top 30 sectors for *numerical* gain added over 91,000 jobs so some of the fastest *rates* do not necessarily translate to the largest numerical increases.

Leading the fastest growers is a manufacturing sector, *costume jewelry*, which grew by 619 percent between 1990 and 1997. This industry, however, had only 31 jobs in 1990 and grew to 223 jobs in 1997. Still, while this is a small manufacturing sector, it should not be discounted for a potential downtown presence. There are many functional downtown manufacturing locations, particularly for small and fast-growing businesses which may not require huge amounts of space. The costume jewelry industry may well be one of these which requires relatively smaller machinery for making relatively small articles.

Second on the list of the fastest growth rates in the *motion picture distribution* sector, growing 463 percent. Again, however, this is a relatively small sector. The third fastest growing sector is *logging camps and contractors* but this, too, is a very small sector and not one to count heavily on given the nature of the work and natural resources required.

Biggest job gainers in the most rapidly growing sectors include *computer and data processing services* (growing 88% and adding 6,600 jobs), *amusement and recreation services* (up 70% and 8,650 jobs), *management and public relations* (up 117% and 5,200 jobs), *home health care services* (up 134% and 2,800 jobs), and *health and allied services* (up 134% and 2,800 jobs). All of these also show up on the sectors with the largest job gains. All also have potential for adding rationally to the downtown employment base with some qualification regarding the health industry jobs—although there is no reason not to attempt to attract health industry employers to a more diversified downtown economy.

**Table 5  
Strongest Historic Growth Sectors - St. Louis Metro Area, 1990-1997**

Missouri Portion of the Metro Area					
Top 30 by Percent Job Growth - Metro Area					
SIC	Sector Description	Metro Area (Missouri Side Only)			
		1990	1997	Job Growth	Pct. Growth
All	Total Jobs	986,456	1,046,565	60,109	6.1%
396	Costume Jewelry & Novelties	31	223	192	619.4%
782	Motion Picture Distribution & Services	62	349	287	462.9%
241	Logging Camps & Contractors	2	10	8	400.0%
654	Title Abstract Officers	67	267	200	298.5%
704	Organization Hotels & Lodging Places	9	31	22	244.4%
207	Fats & Oils	113	380	267	236.3%
379	Misc. Transportation Equip.	12	36	24	200.0%
829	Schools & Educational Services, nec	534	1596	1,062	198.9%
628	Security & Commodity Services	415	1001	586	141.2%
809	Health & Allied Services, Nec	2111	4943	2,832	134.2%
808	Home Health Care Services	2828	6607	3,779	133.6%
225	Knitting Mills	3	7	4	133.3%
874	Management & Public Relations	4414	9584	5,170	117.1%
473	Freight Transportation Arrangement	633	1344	711	112.3%
512	Drugs, Proprietaries, & Sundries	925	1948	1,023	110.6%
549	Misc. Food Stores	228	466	238	104.4%
253	Public Building & Related Furniture	566	1138	572	101.1%
596	Nonstore Retailers	1437	2879	1,442	100.3%
751	Auto Rentals, Leasing W/O Drivers	1791	3505	1,714	95.7%
794	Commercial Sports	656	1281	625	95.3%
961	Gov't Admin. Of Economic Programs	226	437	211	93.4%
329	Misc. Nonmetallic Mineral Prods.	163	313	150	92.0%
737	Computer & Data Proc. Svcs.	7459	14050	6,591	88.4%
639	Insurance Carriers, Nec	30	56	26	86.7%
552	Motor Vehicle Dealers (Used Only)	432	784	352	81.5%
415	School Buses	1444	2527	1,083	75.0%
965	Regulation of Misc. Business	364	623	259	71.2%
546	Retail Bakeries	1428	2439	1,011	70.8%
799	Misc. Amusement & Recreation Services	12374	21020	8,646	69.9%
804	Offices Of Other Health Practitioners	2404	4067	1,663	69.2%
	Total, top 30	43,161	83,911	40,750	94.4%
	All other sectors	943,295	962,654	19,359	2.1%

Sources: Missouri Division of Employment Security and Development Strategies.

Table 6 lists the same sectors as above but for job changes within the City of St. Louis. These top 30 sectors for the region added 80.2 percent more jobs in the City despite net job losses overall of 8.5 percent. This means that all other sectors declined by almost 11 percent in the City. The top 30 sectors with the highest rates of regional growth added 5,946 jobs to the City of St. Louis in the face of net job losses of 23,800. In other words, these fast growing sectors have proven to be important not only to the region but also to the City as it attempts to stabilize its job base.

**Table 6**  
**Strongest Historic Growth Sectors - St. Louis Metro Area, 1990-1997**

City of St. Louis Growth Rates within Metro Area Rankings  
 Top 30 by Percent Job Growth - Metro Area

SIC	Sector Description	St. Louis City			
		1990	1997	Job Growth	Pct. Growth
All	Total Jobs	279,466	255,623	(23,843)	-8.5%
396	Costume Jewelry & Novelties	4	4	-	0.0%
782	Motion Picture Distribution & Services	44	67	23	52.3%
241	Logging Camps & Contractors	0	0	-	na
654	Title Abstract Officers	7	10	3	42.9%
704	Organization Hotels & Lodging Places	1	11	10	1000.0%
207	Fats & Oils Manufacturing	98	317	219	223.5%
379	Misc. Transportation Equip. Mfg.	0	0	-	na
829	Private Schools & Educational Svcs, NEC	59	367	308	522.0%
628	Security & Commodity Services	33	201	168	509.1%
809	Health & Allied Services, Nec	548	1635	1,087	198.4%
808	Home Health Care Services	764	545	(219)	-28.7%
225	Knitting Mills	3	7	4	133.3%
874	Management & Public Relations	1105	1313	208	18.8%
473	Freight Transportation Arrangement	169	271	102	60.4%
512	Drugs, Proprietaries, & Sundries	157	453	296	188.5%
549	Misc. Food Stores	48	29	(19)	-39.6%
253	Public Building & Related Furniture	0	0	-	na
596	Nonstore Retailers	274	355	81	29.6%
751	Auto Rentals, Leasing W/O Drivers	128	116	(12)	-9.4%
794	Commercial Sports	554	943	389	70.2%
961	Gov't Admin. Of Economic Programs	180	376	196	108.9%
329	Misc. Nonmetallic Mineral Prods.	59	25	(34)	-57.6%
737	Computer & Data Proc. Svcs.	612	1076	464	75.8%
639	Insurance Carriers, Nec	0	0	-	na
552	Motor Vehicle Dealers (Used Only)	113	136	23	20.4%
415	School Buses	578	1471	893	154.5%
965	Regulation of Misc. Business	179	228	49	27.4%
546	Retail Bakeries	314	277	(37)	-11.8%
799	Misc. Amusement & Recreation Services	1099	2863	1,764	160.5%
804	Offices Of Other Health Practitioners	282	262	(20)	-7.1%
	Total, top 30	7,412	13,358	5,946	80.2%
	All other sectors	272,054	242,265	-29,789	-10.9%

Sources: Missouri Division of Employment Security and Development Strategies.

Among the most rapidly growing sectors in the City is a familiar list: *amusement and recreation services, health and allied services, computer and data processing services, and private schools and educational services.* Added to the highest rate of gain for the City, however, is *school bus transportation services* which, while down the list for the metropolitan area, added 893 jobs in the City for a 155 percent job gain. This may be attributable to expansion of the desegregation busing program.

## Projections of Numerical Job Growth in the Metropolitan Area

Projections by the States of Missouri and Illinois for the entire 12-county metropolitan area were summarized earlier but Table 7 breaks them down for the top 30 sectors for future expected growth, in the Missouri part of the region only, for comparison with the immediately preceding tables. These projections were made for the period 1994 to 2005 but Development Strategies adjusted the figures to represent 1997 to 2005 jobs gains in order to pick up where the earlier tables ended.

The top 30 sectors in terms of added numbers of jobs for the 1997-2005 period are expected to add just over 74,100 employed workers to the Missouri part of the region. This would represent an 18.4 percent growth rate compared to an overall growth rate of 10.4 percent for the entire Missouri/metro area. All the other sectors, therefore, would grow by a net amount of 4.9 percent and add 28,450 jobs. The top 30, therefore, represent 72 percent of all projected growth in the region between 1997 and 2005.

Leading the list of numerical job gainers would be *eating and drinking places* which would add almost 8,600 jobs and grow 12 percent. *Personnel supply services* would be the second fastest job gainer, adding almost 6,900 jobs and growing some 26 percent. In third place is *amusement and recreation services*, expected to add almost 6,000 jobs and grow another 28 percent.

All three of the above have strong potential for locating in downtown St. Louis. Clearly, if downtown is to be a place for 24-hour entertainment and recreation, it will need more restaurant workers, temporary and emergency employment workers, and amusement and recreation workers. As these are projected to be strong growth sectors, it behooves downtown to attempt to capture as large a share as possible as downtown St. Louis is positioning itself to be a regional center for entertainment and dining.

Joining *personnel supply services* high on the list is *computer and data processing services* and *miscellaneous business services*. All three of these already have a major presence in the City of St. Louis and, presumably, downtown. Therefore, they are candidates for aggressive attraction to the downtown employment center as downtown positions itself as an even stronger concentration of the region's jobs.

In fact, almost all of the sectors shown on Table 7 can be targeted by downtown St. Louis in order to capture at least a "fair share" of growth. Exceptions might be jobs in *the manufacturing of motors vehicles and equipment* but, because there are industrial development corridors on the fringes of downtown St. Louis, and because greater St. Louis has relatively few firms in the auto equipment supply sector (as opposed to strictly auto assembly), downtown St. Louis can even be made attractive to this growth sector.

Table 8 shifts from projected *numerical* job growth to the projected *rate* of job growth, or percentage change for the period of 1997 to 2005. Here, the top 30 sectors would grow by a weighted average of 28.8 percent compared to the overall growth rate of 10.5 percent. They would add less than half of all net new jobs, however, at 48,900 out of a total of 102,600. This, again, indicates that fast growing sectors aren't always those that add the most jobs.

Still, downtown can be positioned to capture a large portion of this growth. As a center of perhaps the most diverse economic concentration in the region, it can be made very attractive for a wide range of small businesses seeking support services and materials in close proximity and inexpensive spaces to help fuel rapid growth. At the same time, there should be made room downtown for larger enterprises, including those in manufacturing.

**Table 7**  
**Strongest Projected Growth Sectors - St. Louis Metro Area, 1997-2005**

Missouri Portion of the Metro Area

Top 30 by Numerical Job Growth - Metro Area

SIC	Sector Description	Metro Area (Missouri Side Only)			
		1997	2005	Job Growth	Pct. Growth
All	Total Jobs	986,456	1,089,047	102,591	10.4%
581	Eating & Drinking Places	71,449	80,028	8,579	12.0%
736	Personnel Supply Services	25,942	32,794	6,852	26.4%
799	Misc. Amusement & Recreation Services	21,020	26,966	5,946	28.3%
371	Motor Vehicles And Equipment	14,601	19,659	5,058	34.6%
737	Computer & Data Proc. Svcs.	14,050	17,762	3,712	26.4%
738	Miscellaneous Business Services	13,332	16,854	3,522	26.4%
808	Home Health Care Services	6,607	9,671	3,064	46.4%
801	Offices Of Physicians	13,073	16,130	3,057	23.4%
806	Hospitals	49,372	52,250	2,878	5.8%
734	Services To Dwellings & Other Bldgs.	10,332	13,061	2,729	26.4%
805	Nursing & Personal Care Facilities	16,200	18,597	2,397	14.8%
809	Health & Allied Services, Nec	4,943	7,047	2,104	42.6%
874	Management & Public Relations	9,584	11,469	1,885	19.7%
871	Engineering & Architectural Services	9,065	10,848	1,783	19.7%
753	Auto Repair Shops	5,834	7,479	1,645	28.2%
421	Trucking & Courier Services, Ex. Air	14,304	15,907	1,603	11.2%
531	Department Stores	24,768	26,343	1,575	6.4%
621	Security Brokers & Dealers	7,869	9,422	1,553	19.7%
836	Residential Care	7,692	9,205	1,513	19.7%
804	Offices Of Other Health Practitioners	4,067	5,470	1,403	34.5%
701	Hotels, Motels, & Tourist Courts	10,866	12,177	1,311	12.1%
594	Misc. Shopping Goods Stores	7,729	9,020	1,291	16.7%
832	Individual & Family Social Services	6,460	7,730	1,270	19.7%
835	Child Day Care Services	5,906	7,067	1,161	19.7%
811	Legal Services, Total	7,315	8,467	1,152	15.7%
733	Mailing, Repro., Comm. Art, & Steno. Services	4,056	5,128	1,072	26.4%
573	Radio, TV, Computer & Music Stores	3,248	4,291	1,043	32.1%
872	Accounting, Auditing, & Bookkeeping	5,263	6,298	1,035	19.7%
751	Auto Rentals, Leasing W/O Drivers	3,505	4,493	988	28.2%
519	Misc. Nondurable Goods	3,998	4,958	960	24.0%
	Total, top 30	402,450	476,591	74,141	18.4%
	All other sectors	584,006	612,456	28,450	4.9%

Sources: Missouri Division of Employment Security and Development Strategies.

**Table 8  
Strongest Projected Growth Sectors - St. Louis Metro Area, 1997-2005**

Missouri Portion of the Metro Area					
Top 30 by Percent Job Growth - Metro Area					
SIC	Sector Description	Metro Area (Missouri Side Only)			
		1997	2005	Job Growth	Pct. Growth
All	Total Jobs	986,456	1,089,047	102,591	10.4%
478	Misc. Transportation Services	242	365	123	50.8%
241	Logging Camps & Contractors	10	15	5	50.0%
808	Home Health Care Services	6,607	9,671	3,064	46.4%
654	Title Abstract Officers	267	390	123	46.1%
809	Health & Allied Services, Nec	4,943	7,047	2,104	42.6%
473	Freight Transportation Arrangement	1,344	1,857	513	38.2%
865	Political Organizations	27	37	10	37.0%
371	Motor Vehicles And Equipment	14,601	19,659	5,058	34.6%
804	Offices Of Other Health Practitioners	4,067	5,470	1,403	34.5%
769	Misc. Repair Shops & Related Services	1,924	2,547	623	32.4%
573	Radio, Tv, Computer & Music Stores	3,248	4,291	1,043	32.1%
799	Misc. Amusement & Recreation Services	21,020	26,966	5,946	28.3%
751	Auto Rentals, Leasing W/O Drivers	3,505	4,493	988	28.2%
753	Auto Repair Shops	5,834	7,479	1,645	28.2%
754	Auto Services, Ex. Repair	1,879	2,408	529	28.2%
752	Auto Parking	1,000	1,282	282	28.2%
735	Misc. Equipment Rental & Leasing	1,993	2,520	527	26.4%
733	Mailing, Repro., Comm. Art, & Steno. Services	4,056	5,128	1,072	26.4%
737	Computer & Data Proc. Svcs.	14,050	17,762	3,712	26.4%
734	Services To Dwellings & Other Bldgs.	10,332	13,061	2,729	26.4%
738	Miscellaneous Business Services	13,332	16,854	3,522	26.4%
736	Personnel Supply Services	25,942	32,794	6,852	26.4%
732	Consumer Credit Reporting & Collecting	2,184	2,761	577	26.4%
509	Misc. Durable Goods	2,458	3,097	639	26.0%
343	Plumbing & Heating Fixtures, Ex. Electric	93	117	24	25.8%
519	Misc. Nondurable Goods	3,998	4,958	960	24.0%
615	Business Credit Institutions	2,093	2,584	491	23.5%
616	Mortgage Bankers & Brokers	4,021	4,963	942	23.4%
614	Personal Credit Institutions	1,307	1,613	306	23.4%
801	Offices Of Physicians	13,073	16,130	3,057	23.4%
	Total, top 30	169,450	218,319	48,869	28.8%
	All other sectors	817,006	870,728	53,722	6.6%

Sources: Missouri Division of Employment Security and Development Strategies.

### Top Sectors by Location Quotient Compared to the U.S. Economy

The above analysis by economic sector is valuable in describing where the growth is and where it is expected to be. But it doesn't explain which sectors represent particularly strong sectors for the St. Louis region—sectors in which St. Louis has a notable national presence. Table 9, therefore, lists the top 35 sectors by *location quotient*, ranked for 1997. Location quotients show how the percentage of jobs in each sector in the metro area compare to the percentage of all jobs in those sectors for the United States economy as a whole.

**Table 9**  
**Top 35 Sectors by Location Quotients Compared to U.S. Economy**  
 1990 and 1997 for Metro Area and City's Job Share

SIC	Sector Description	Metro LQs (MO Side)		City's Job Share	
		1990	1997	1990	1997
All	Total Jobs	986,456	1,089,047	28.3%	24.4%
821	Elementary & Secondary Schools	5.9	6.4	14.9%	16.3%
372	Aircraft And Parts Manufacturing	5.9	5.3	0.5%	0.6%
208	Beverages Manufacturing	5.0	5.2	80.9%	78.8%
286	Industrial Organic Chemicals Mfg.	5.5	4.6	28.9%	25.5%
358	Refrigeration & Service Mach. Mfg.	4.5	3.7	29.2%	18.3%
279	Printing Trade Services	3.4	3.6	22.8%	14.2%
253	Public Building & Related Furniture Mfg.	1.9	3.0	0.0%	0.0%
602	Commercial Banks	2.1	2.6	49.4%	51.2%
278	Blankbooks & Bookbinding Mfg.	2.6	2.3	37.3%	19.1%
822	Colleges And Universities	2.1	2.3	27.5%	25.3%
284	Soaps, Cleaners, & Toilet Goods Mfg.	2.1	2.2	44.6%	47.7%
502	Furniture & Home Furnishings Distrib.	2.2	2.2	37.8%	28.8%
615	Business Credit Institutions	1.9	2.2	40.9%	3.9%
204	Grain Mill Products Mfg.	2.7	2.2	76.7%	82.2%
415	School Buses Transportation Services	1.4	2.1	40.0%	58.2%
799	Misc. Amusement & Recreation Services	1.9	2.1	8.9%	13.6%
336	Nonferrous Foundries	1.5	2.1	3.5%	1.2%
495	Sanitary Services	2.6	2.1	27.4%	26.9%
444	Water Transportation Of Freight, nec	5.0	2.1	48.0%	61.1%
259	Misc. Furniture & Fixtures Mfg.	2.3	2.1	44.5%	37.2%
275	Commercial Printing	2.1	2.1	29.2%	26.8%
314	Footwear, Ex Rubber Mfg.	3.1	2.1	8.6%	6.5%
285	Paints & Allied Products Mfg.	2.0	2.1	59.7%	49.8%
153	Operative Building Construction	1.5	2.1	1.6%	2.3%
621	Security Brokers & Dealers	1.8	2.1	51.9%	49.6%
751	Auto Rentals, Leasing W/O Drivers	1.1	2.0	7.1%	3.3%
732	Consumer Credit Reporting & Collecting	1.9	2.0	15.8%	10.9%
341	Metal Cans & Shipping Containers Mfg	3.2	1.9	55.0%	28.3%
481	Telephone Communication	1.8	1.9	56.2%	42.0%
616	Mortgage Bankers & Brokers	2.7	1.9	5.5%	2.8%
411	Local & Suburban Transportation	2.6	1.9	76.7%	50.6%
458	Air Transportation Service	1.5	1.8	33.7%	32.3%
283	Drugs Manufacturing	1.7	1.8	38.7%	38.0%
566	Shoe Stores	1.8	1.8	38.3%	31.1%
371	Motor Vehicles and Equipment Mfg.	2.1	1.8	2.9%	3.9%

Source: *Development Strategies*.

On this basis, a location quotient (LQ) of 1.0 means that the proportion of jobs in the St. Louis economy for that sector is the same proportion as in the national economy. LQs greater than 1.0, therefore, indicate sectors where St. Louis has a greater "strength" than the U.S. economy while LQs less than 1.0 indicate sectors where St. Louis is less dominant. Of course, very high numbers, such as those at the top of Table 9, represent sectors where St. Louis is considered a national leader with a measure of a comparative advantage.

Illustrating this last point are four of the five top sectors that are represented in St. Louis by well known companies. *Aircraft manufacturing* has a very high LQ of 5.3 (although down from 5.9 in 1990) and is represented by Boeing Corporation (formerly McDonnell Douglas). *Beverage manufacturing* is a sector

dominated in St. Louis by Anheuser-Busch Companies which controls nearly half of the beer market in the U.S. *Industrial organic chemicals* is represented by such firms as Monsanto and Mallinkrodt while *refrigeration manufacturing* is dominated by Hussman Refrigeration.

These sectors clearly represent the strengths of the St. Louis economy. Interestingly, however, despite four automobile assembly plants in the region, *the motor vehicles manufacturing* sector ranks 35<sup>th</sup> on the list of 35 with a location quotient of 1.8. This LQ so close to 1.0 suggests that St. Louis is represented rather fairly with regard to the auto industry in the nation. Still, this is a sector which garners a lot of attention because there are so few auto equipment *suppliers* in the region even though there are so many assembly plants. Perhaps St. Louis could increase this particular location quotient.

Greater St. Louis is also well known for its number and diversity of private and parochial schools. This economic strength is demonstrated by the leading sector on the location quotient list which is *private elementary and secondary schools* (SIC 821—public schools have an SIC beginning with the number 9) with a very high LQ of 6.4. In fact, this LQ is higher than in 1990, perhaps an indication of some shifts in student populations away from public schools.

While the sectors shown on Table 9 demonstrate where St. Louis has particular comparative advantages in the nation, not all of the sectors might be suitable for downtown locations. A great deal of the manufacturing represented on the list is in well-established sectors which would not consider a downtown location. Still, some of their office headquarters might make such a consideration. Of particular promise may be *commercial banks* (which also showed strong recent growth), *business credit institutions*, *amusement and recreation services* (again dominated recently by gaming if this sector can be built on for more growth), *security brokers and dealers*, and *mortgage bankers and brokers*. Such sectors represent classic downtown business establishments. That they also represent strong location quotients suggests them as good candidates for helping downtown strengthen its identity as the center of one of the nation's top metropolitan economies.

### **Business Clusters with Growth Potential in St. Louis**

Business clusters are groups of economic sectors which, together, form collaborative or competitive relationships in order to increase production efficiency and competitiveness. In 1996, the St. Louis Regional Commerce & Growth Association retained economists at the University of Missouri-St. Louis to determine what key clusters exist in greater St. Louis and whether or not they are growth clusters. This analysis summarizes the resulting report.

Two general types of business clusters were identified:

- Single industry clusters consist of several firms in the same industry. Prominent U.S. examples are the clustering of computer firms in California's Silicon Valley and high technology firms in North Carolina's Research Triangle.
- Cross-industry clusters consist of a central or hub firm (or firms) and several input suppliers who cooperate by sharing information, technological expertise, and/or innovation.

Determination of the best St. Louis clusters followed this simplified methodology:

1. Calculation of employment concentrations into location quotients, as described above.
2. Grouping of individual sectors into preliminary clusters based on input linkages from econometric models.
3. Determination of the importance of the resulting clusters by analyzing employment growth trends and economic multipliers. The multipliers indicate how many times a single dollar expended by that

cluster in the metropolitan economy re-circulates in the metropolitan economy to produce additional income and jobs.

Key growing clusters for St. Louis include:

1. Bio/Medical cluster where annual growth projections for employment average 1.3% and where the economic multiplier is 3.04.
2. Food Processing cluster where annual growth projections for jobs average 0.7% and the multiplier is a large 3.61.
3. Health Services cluster where annual job growth is projected to be 1.6% and the multiplier is 1.52
4. Tourism cluster where annual average job growth would be 2.4% and the multiplier is 1.31.
5. Transportation and Distribution cluster where annual job growth is projected at 1.1% and the multiplier is 2.10.

It is important to point out that the study also found two declining clusters: aerospace/defense and metals manufacturing.

The above list obviously includes a number of the sectors which have been raised consistently in this report as strengths for the St. Louis area. The Food Processing cluster includes such sectors as beverages (e.g., Anheuser-Busch) and grain mill products manufacturing (which is on the top 35 sectors by location quotient). The Health Services cluster includes the several health care sectors listed on most of the previous tables. The Tourism cluster includes jobs in the amusement and recreation sector which is consistently shown as a St. Louis strength.

It is important to note that there are sectors which are critical to this region that are not included in the above list because they do not fit into the above definition of clusters but, nevertheless, are vital to the metropolitan economy. These include, for example, telecommunications, electrical power, and the water and sewer sectors. Clearly, however, none of the growth clusters could adequately exist without these latter clusters so the potential always exists to bolster the regional and downtown economy from these "support clusters" as well.

#### **Visitation to the St. Louis Area and to Downtown St. Louis**

The annual American Travel Survey (ATS) by the U.S. Department of Transportation provides an excellent starting point in evaluating the attractiveness of St. Louis as a place to visit. Conducted for about 170 metropolitan areas of the United States, the ATS is indicative of the relative ability of a region to attract visitors. As shown in the above table, metropolitan St. Louis is a "net" gainer with respect to visitors who travel at least 100 miles to get to or depart from St. Louis. All regions have people who leave the region to visit elsewhere, and St. Louis is no exception.

In 1995, in fact, 8,349,000 residents traveled away from St. Louis at least 100 miles. But 9,140,000 people from other places visited St. Louis in the same year, indicating that greater St. Louis gained a net of some 791,000 visitors. And visitors spend money when they travel. The survey indicates that the travel industry is likely to be a "net export" sector for St. Louis, meaning more money is attracted for spending in the region than leaves the region as residents spend their travel dollars in other places.

While reliable statistics on visits to specific parts of the St. Louis area are not available, data from the St. Louis Convention and Visitors Commission (CVC) suggests that downtown is a major benefactor from visitors. As shown on Table 11, 20 major attractions in the region (four are in Metro East, by the way) drew 38.2 million visitors (although many of them are not from out of town). Of these, the downtown attractions (the first seven on the list) attracted 16.0 million, or almost 42 percent of the total.

**Table 10**  
**Household Trips and Person Trips to and from the St. Louis Metropolitan Area, by Selected Trip Characteristics:**  
**1995 (Source: U.S. Department of Transportation, American Travel Survey, 1997).**

Trip characteristics	Household Trips				Person Trips			
	Origin in area		Destination in area		Origin in area		Destination in area	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total	5,590	100.0	6,042	100.0	8,349	100.0	9,140	100.0
Principal means of transportation								
Personal use vehicle	4,145	74.1	4,397	72.8	6,557	78.5	7,215	78.9
Airplane	1,315	23.5	1,473	24.4	1,640	19.6	1,724	18.9
Commercial airplane	1,288	23.0	1,448	24.0	1,607	19.2	1,698	18.6
Bus	109	2.0	136	2.3	118	1.4	158	1.7
Intercity bus	31	0.5	12	0.2	31	0.4	12	0.1
Charter or tour bus	77	1.4	81	1.3	86	1.0	88	1.0
Train	18	0.3	29	0.5	30	0.4	36	0.4
Ship, boat, or ferry	2	--	3	--	4	--	4	--
Other	--	--	3	0.1	--	--	3	--
Round-trip distance								
Less than 300 miles	1,116	20.0	1,991	33.0	1,746	20.9	3,438	37.6
300 to 499 miles	1,312	23.5	780	12.9	2,260	27.1	1,179	12.9
500 to 999 miles	1,493	26.7	1,763	29.2	1,998	23.9	2,580	28.2
1000 to 1999 miles	1,148	20.5	1,113	18.4	1,617	19.4	1,438	15.7
2000 miles or more	521	9.3	395	6.5	727	8.7	505	5.5
Mean (miles)	879	NA	791	NA	843	NA	730	NA
Median (miles)	542	NA	523	NA	508	NA	495	NA
Calendar quarter								
1st quarter	1,056	18.9	1,120	18.5	1,509	18.1	1,920	21.0
2nd quarter	1,533	27.4	1,349	22.3	2,329	27.9	1,965	21.5
3rd quarter	1,725	30.9	2,019	33.4	2,711	32.5	3,115	34.1
4th quarter	1,276	22.8	1,554	25.7	1,800	21.6	2,140	23.4
Main purpose of trip								
Business	1,616	28.9	1,902	31.5	1,806	21.6	2,158	23.6
Pleasure	3,177	56.8	3,016	49.9	5,315	63.7	4,984	54.5
Visit friends or relatives	1,690	30.2	1,693	28.0	2,785	33.4	2,598	28.4
Leisure	1,487	26.6	1,323	21.9	2,530	30.3	2,386	26.1
Rest or relaxation	485	8.7	300	5.0	806	9.7	454	5.0
Sightseeing	222	4.0	268	4.4	449	5.4	699	7.6
Outdoor recreation	487	8.7	124	2.1	808	9.7	219	2.4
Entertainment	253	4.5	358	5.9	411	4.9	593	6.5
Personal business	797	14.3	1,123	18.6	1,228	14.7	1,998	21.9
Other	--	--	--	--	--	--	--	--
Vacation and weekend trips								
Vacation trip	2,602	46.5	2,443	40.4	4,289	51.4	4,110	45.0
Weekend trip	2,638	47.2	2,129	35.2	4,154	49.8	3,225	35.3
1 or 2 nights away from home	1,604	28.7	1,331	22.0	2,484	29.8	1,980	21.7
3 to 5 nights away from home	1,033	18.5	798	13.2	1,670	20.0	1,245	13.6
Travel party type and size								
1 adult, no children under 18	3,464	62.0	3,594	59.5	3,464	41.5	3,594	39.3
2+ adults, no children under 18	1,229	22.0	1,412	23.4	2,436	29.2	2,739	30.0
1 adult, 1+ children under 18	271	4.8	365	6.0	642	7.7	968	10.6
2+ adults, 1+ children under 18	466	8.3	532	8.8	1,621	19.4	1,673	18.3
No adult, 1+ children under 18	161	2.9	139	2.3	187	2.2	166	1.8
Mean trvl. prty. size (hshd. mbrs.)	1.6	NA	1.6	NA	2.1	NA	2.1	NA
Nights away from home								
None	1,032	18.5	2,017	33.4	1,490	17.9	3,329	36.4
1 to 3 nights	3,250	58.1	2,888	47.8	4,912	58.8	4,174	45.7
4 to 7 nights	959	17.2	851	14.1	1,434	17.2	1,202	13.1
8 nights or more	349	6.2	287	4.8	512	6.1	435	4.8
Mean, excluding none (nights)	3.8	NA	3.6	NA	3.6	NA	3.6	NA
Type of lodging at destination								
One or more nights at dest.	4,492	100.0	3,986	100.0	6,767	100.0	5,758	100.0
Friend's or relative's home	1,767	39.3	1,661	41.7	2,763	40.8	2,590	45.0
Hotel, motel, or resort	1,937	43.1	2,078	52.1	2,795	41.3	2,878	50.0
Rntd. cabin, condo, or vac. home	231	5.1	12	0.3	367	5.4	15	0.3
Ownd. cabin, condo, or vac. home	252	5.6	4	0.1	405	6.0	7	0.1
Camper, trailer, recreational vehicle, tent	72	1.6	37	0.9	145	2.1	53	0.9
Other	234	5.2	193	4.8	291	4.3	216	3.8
Nights at destination								
Mean nights at destination	3.6	NA	3.6	NA	3.5	NA	3.6	NA
Friend's or relative's home	4.4	NA	4.1	NA	4.0	NA	4.2	NA
Hotel, motel, or resort	2.7	NA	2.9	NA	2.8	NA	2.7	NA

Trips of 100 miles or more, one way. Excludes travel outside the U.S. Data based on a sample and subject to sampling variability; see documentation. Symbol -- means "rounds to or represents zero." NA means "Not Applicable." NM means "Data are not meaningful or data do not meet publication standards due to high sampling variability." Numbers are in Thousands.

These figures not only demonstrate that greater St. Louis is a net travel destination. They reinforce the critical importance of downtown facilities for attracting and entertaining visitors. While downtown represents a very small portion of the land area of greater St. Louis, it appear to lure as many as 42 percent of all visitors--an amazing proportion. Making downtown as comfortable, convenient, and entertaining as possible greatly benefits not only the downtown itself but also the entire metropolitan area.

St. Louis Union Station	5,000,000	13.1%
Gateway Arch and Old Courthouse	3,550,546	9.3%
St. Louis Cardinals Baseball	2,654,708	6.9%
President Casino	1,900,000	5.0%
St. Louis Public Library	1,524,100	4.0%
St. Louis Blues Hockey	771,133	2.0%
St. Louis Rams Football	599,345	1.6%
Subtotal: Downtown	15,999,832	41.9%
Station Casino St. Charles	5,129,582	13.4%
Casino Queen	4,109,767	10.8%
Alton Belle Casino	2,519,551	6.6%
St. Louis Zoo	2,513,436	6.6%
Six Flags	1,800,000	4.7%
St. Louis Science Center	1,429,678	3.7%
National Shrine of Our Lady of the Snows	900,000	2.4%
Tower Grove Park	800,000	2.1%
Missouri Botanical Garden	723,964	1.9%
Saint Louis Art Museum	645,738	1.7%
Grant's Farm	551,379	1.4%
The Fox Theater	537,806	1.4%
Fairmount Park	537,242	1.4%
Subtotal: Rest of Region	22,198,143	58.1%
<b>TOTAL REGION</b>	<b>38,197,975</b>	<b>100.0%</b>

*Source: St. Louis Convention & Visitors Commission, 1997-98.*

### **Translating Economic Strengths to Commercial Real Estate Demands**

A goal of the above presentation and analysis is to determine how much growth can be projected for downtown St. Louis in order for it to share more-or-less equally in future growth of the metropolitan economy. Past trends, however, should not be used as indicators of the future. If, indeed, past trends were indicative of the future, there would be little need to add to or substantially bolster the quality of the downtown real estate infrastructure. That is, if the employment base of the City of St. Louis and, by extension, downtown St. Louis, is eroding, then adding more and better space would only increase vacancy rates and add to the supply of deteriorating buildings.

At present, for instance, it is estimated that about 8.4 percent of all jobs in the Missouri portion of the metropolitan area are downtown. This is a decrease from about 9.5 percent in 1991 and would decrease further to 7.3 percent by the year 2005 if the trends projected on Table 1 persist. These trends also project that not only would downtown lose market share, it would actually decrease in employment size.

The translation of regional economic growth into improved real estate assets in downtown St. Louis must start with a premise, therefore, that downtown (and maybe the entire City) will be able to capture a stronger share of regional growth, perhaps even increasing downtown's proportion of regional employment. What brings about such a change is multi-faceted and not a purpose of this report; but it will

likely include a combination of economic development initiatives, improvements in the image of downtown as a place to work, live, and recreate, changes in the approach to managing downtown affairs, and creating/improving an upgraded stock of real estate assets.

On a premise that downtown can turn the apparent tide toward fewer jobs in favor of net growth by the year 2005, it is valuable to project the potential implications of such a turnaround on the need for improved real estate assets. The opportunity is there. Between 1997 and 2005, the regional economy is projected to grow at a relatively healthy clip. The Missouri part of the metro area is projected to grow by 9.8 percent between 1997 and 2005 while the entire metro area would grow by some 7.8 percent in terms of numbers of jobs.

Given that downtown held about 9.5 percent of all Missouri/Metro jobs in 1991, the ability of downtown St. Louis to re-attain this standard by 2005 would mean that jobs in the downtown area would increase by 21,000 over 1997 numbers (up 24%) to a total of about 109,000 workers. This is a substantial increase for downtown St. Louis and would require about 2.5 times the growth rate of the Missouri side of the metro area.

#### *Present Downtown Real Estate Inventory*

Based on an extensive survey by the Downtown Partnership in 1997, downtown St. Louis has the an estimate 71,804,000 square feet of floor area in all its buildings, including schools, office structures, retail establishments, churches, museums, etc., as shown on Table 12. About 78.2 percent of this space is actually occupied, however; almost 22 percent is vacant.

Occupancy rates are not evenly distributed, ranging from a high of 100 percent for libraries, museums, recreational facilities, and public spaces to 99 percent for social service structures and churches to a low of just 2.1 percent for what is classified as "Class D" office space. The next lowest occupancy rate is 46.8 percent for loft buildings, indicating that more than half of such space might be available for unique downtown uses such as loft housing, artist studios, small manufacturing operations, and the like. Housing developments are also somewhat poorly occupied at about 78.5 percent, about the average for all floor area downtown.

Known as the greatest concentration of office space in the metropolitan region, offices make up only about a third of all floor area downtown. At over 24 million square feet, however, this actually is the single largest concentration of space (to this could be added almost 1.5 million square feet of government office space and another 210,000 square feet of offices in institutions). While St. Louis County, as a whole, has much more office space at 54.5 million square feet, no similar location in the County matches downtown St. Louis. Clayton/mid-County, for instance, has only about 11.2 million square feet while the largest concentration in the County, at 13.1 million, is along Olive Street and in the West Port area of northwest St. Louis County. Occupancy of downtown's office space, however, is just 78.6 percent while it ranges well above 90 percent throughout St. Louis County and the rest of the region.

Despite this strength in office space, downtown's central location does not give it a special advantage in terms of retail space. Combining a few of the categories on Table 10 (retail, restaurant, auto service), gross retail space downtown totals about 3.2 million square feet. There is more retail space in seven of eight subdistricts of St. Louis County than in downtown St. Louis. In fact, St. Louis County has about as much retail space, 56.8 million square feet, as it has office space, 54.5 million square feet. Retail space downtown totals only about 13 percent of office space.

<b>Table 12</b>			
<b>Total Floor Area in Downtown St. Louis</b>			
Category:	Total Area	Occupied	Occupancy
<b>Business Property</b>			
Auto Service	115,019	81,357	70.7%
Hotel	4,954,639	4,505,322	90.9%
Loft	7,762,449	3,634,041	46.8%
Mfg/warehouse	7,433,869	5,286,276	71.1%
Class A Office	9,672,045	9,275,056	95.9%
Class B Office	7,511,665	6,630,987	88.3%
Class C Office	4,494,843	2,968,065	66.0%
Class D Office	2,392,664	50,699	2.1%
Subtotal: Office	24,071,217	18,924,777	78.6%
Parking	7,695,310	7,476,273	97.2%
Recreation	3,334,598	3,201,988	96.0%
Restaurant	480,401	392,549	81.7%
Retail	2,616,107	1,744,056	66.7%
Social Services	148,569	37,128	25.0%
Transportation	379,580	361,858	95.3%
Utilities	326,600	312,099	95.6%
<b>TOTAL BUSINESS PROPERTY</b>	<b>59,318,358</b>	<b>45,957,725</b>	<b>77.5%</b>
<b>Government Property</b>			
Office	4,591,088	3,403,001	74.1%
Public Service	1,467,597	1,467,597	100.0%
Recreation	163,680	163,680	100.0%
<b>TOTAL GOVERNMENT</b>	<b>6,222,365</b>	<b>5,034,278</b>	<b>80.9%</b>
<b>HOUSING</b>	<b>4,651,493</b>	<b>3,652,552</b>	<b>78.5%</b>
<b>Institutional Property</b>			
Libraries and Museums	195,321	195,321	100.0%
Office	209,573	194,863	93.0%
Recreation	38,802	38,802	100.0%
Schools	591,371	493,076	83.4%
Social Services	213,843	211,706	99.0%
<b>TOTAL INSTITUTIONS</b>	<b>1,248,910</b>	<b>1,133,768</b>	<b>90.8%</b>
<b>Religious Property</b>			
Churches	306,897	304,977	99.4%
Schools	55,944	44,570	79.7%
<b>TOTAL RELIGIOUS</b>	<b>362,841</b>	<b>349,547</b>	<b>96.3%</b>
<b>TOTAL ALL PROPERTIES</b>	<b>71,803,967</b>	<b>56,127,870</b>	<b>78.2%</b>

Source: Downtown Partnership Survey of 1997

### Projecting Potential Office Space Demand in Downtown St. Louis

As noted earlier, trend line projections of employment in downtown St. Louis would probably not lead to a demand for more and improved commercial real estate offerings. On the other hand, if downtown St. Louis begins to re-capture a larger share of the region's employment, the need for space increases as the region's economic strength advances based on employment growth.

Returning to downtown's 1991 capture of all employment in the Missouri part of the metropolitan area could increase downtown jobs from a present 88,100 to about 109,000—or 9.5 percent of the Missouri/metro job base. Using the 56.1 million occupied square feet for all uses as shown on Table 10, this means that every downtown worker represents an average of about 635 square feet of occupied floor area. The tremendous range of downtown buildings, of course, suggests that this is likely a fair average—especially when considering that this includes such buildings as convention and meeting facilities, churches, parking garages, and industrial buildings which tend to have very high average floor areas per employee.

Assuming that this figure of 635 square feet per worker, on a gross basis for occupied space, is a fair representation of the long term average for a place as diverse as downtown St. Louis, an increase in downtown employment from 88,100 to 109,000 would increase the occupancy from 56.1 million square feet to 69.2 million square feet. As it turns out, this increase in occupancy of about 13.1 million square feet would still not reach the total floor area inventory shown on Table 10 of 71.8 million square feet. It would, however, increase the occupancy rate to a very tight 96.4 percent, well above the 78.2 percent at present.

It is not fair to make such assumptions about re-occupancy of existing floor area, of course. Some of the existing inventory, in fact, is already highly occupied (e.g., government facilities, libraries and museums, recreation places, and even Class A office space which is about 96 percent occupied). As downtown grows, it is most likely to experience pressures to add new or vastly improved space rather than to simply re-occupy existing space. Moreover, as shown later, potential housing demand in the downtown area could utilize a substantial portion of the existing loft space and maybe some other older buildings for residential conversion. This would reduce the unused inventory thereby putting pressure on the market to create more space.

Thus, a more realistic, if still relatively gross, projection of the need for additional space would discount the likelihood of reusing certain types of space (e.g., Class D and some Class C office space, loft space which could be converted to housing, and so forth). Dropping all the Class D space, a third of the Class C space, and half of the loft space from consideration for employment growth, for example, would reduce the overhanging inventory from the present 15.7 million square feet to about 8.0 million square feet. Growth in employment to 109,000 by the year 2005 would require an additional 13.2 million square feet, well above this revised, and presently empty, inventory.

Such adjustments suggest that there could be a need, therefore, for around five million square feet of additional floor area in the downtown market if downtown is to be able to compete for additional share of the region's jobs. This number is probably even higher if downtown is to become truly competitive; the inventory of available space in suburban areas is not nearly as high as it is downtown so new real estate products in the suburbs will, in fact, be new. Thus, downtown's older structures would have to compete with new and, presumably, very functional 21<sup>st</sup> century buildings in the suburbs. Being competitive, therefore, may require that even more than five million *new* square feet be created.

When considering an objective of capturing more employment, it is best to first look at downtown's dominant employment purpose: office space. If a goal is to create more new space to become competitive, a great deal more new space will have to be created. Class A office space, for instance, is almost fully occupied at present, with less than 400,000 square feet available, or about four percent vacancy rate—barely enough for a healthy real estate market to be flexible. Class B office space has more capacity at about 900,000 square feet (under 12 percent vacancy) but this, too, would need additional capacity to absorb future growth. At present, one-third of the occupied downtown floor area is in office space. If the potential exists to capture almost 21,000 new jobs at 635 square feet per worker—or 13.2 million square feet—one third of this space should be in office space, or over 4 million square feet.

To remain competitive, therefore, a vast amount of office space needs to be created or sharply upgraded. Four million square feet of office space would represent, more or less, four additional buildings the size of the Metropolitan Square Building. While it would be unwise to predict that this much *new* space is necessary, or even necessary in separate buildings as large as Met Square, this simple approach to

indicating a need to improve downtown's real estate competitiveness clearly suggests that a large amount of new office space will be necessary. Moreover, there is reason to think that a large amount of new office space is feasible when considering regional economic growth projections and the very tight supply of the better quality downtown office space.

The need to create more Class A office supply is further reinforced by recent absorption figures for Class A space in the metropolitan area. According to the St. Louis Chapter of the Society of Industrial and Office Realtors (SIOR), downtown St. Louis absorbed about 98,000 square feet of Class A space in 1997, or about 14 percent of all Class A absorption in the rental component of the region. At the same time, downtown absorbed about 30 percent of all Class B space which was occupied in 1997 (268,000 of 606,000 square feet). Combined, downtown captured 23 percent of these two classes of office demand.

Compared to a goal of capturing 9.5 percent of all jobs in the region, these absorption figures appear strong—suggesting that downtown has the ability to be competitive. But it must capture about 24 percent of the additional regional growth if it is to return to even 1991 capture rates, so the 1997 pace of absorption must continue for several more years at least. But, as noted, downtown is losing its absorbable inventory of space: only 400,000 square feet remain in Class A and 900,000 square feet in Class B. At 1997 absorption rates, these spaces could be completely full within four years—about enough time to build a new office structure and renovate additional existing space.

In short, downtown has reached a point where additions to the real estate inventory are necessary if downtown is to increase its competitiveness with regard to regional economic growth potential. Underutilized sites and buildings must be quickly identified for potential redevelopment and actions initiated to attract development. As noted, this planning should focus on the need for at least 5 million more square feet of new space downtown (to accommodate growth in non-office sectors, as well) and up to 8 million square feet of re-used space. Without such forethought, downtown will continue to become a less dominant center for the metropolitan economy with a commensurate diminishment in its role as the hub of greater St. Louis.

#### **Potential Retail and Restaurant Floor Area Demand**

Potential demand for retail floor area (including both shops and eating/drinking places) in downtown St. Louis emanates from three principal sources: downtown workers, visitors to the downtown area for purposes of attending events or participating in various activities, and residents of the metropolitan area. Based on present employment, visitation, and population, downtown ought to be able to support approximately 2,460,400 square feet of retail floor space, as determined below. In fact, downtown has an inventory of nearly 3.1 million square feet, according to the 1997 survey by the Downtown Partnership. Of that 3.1 million square feet, 2,136,600 was considered occupied by the Partnership.

Thus, downtown can support about 323,800 *more* square feet of retail space than is presently occupied but not as much as is inventoried.

#### **Potential Demand Generated by Downtown Workers**

According to the Downtown Partnership, about 88,100 people are employed in the larger downtown area. Based on previous surveys conducted by Development Strategies in St. Louis and in other large downtowns, we estimate that the average downtown worker would spend \$21.50 per week (1998 dollars) in the downtown area for retail purchases if downtown offered all that it should reasonably be expected to offer in retail settings—and that retailing be reasonably convenient to the relatively short periods of time downtown workers have for eating and shopping.

Using an average of \$245 per square foot for retail sales in a downtown St. Louis environment (source: *The Urban Land Institute's Dollars & Cents of Shopping Centers*, 1997), downtown workers should,

therefore, be able to support approximately 386,600 square feet of retail space over the course of a year (see following table).

#### **Potential Demand Generated by Downtown Visitors**

Visitors come to a downtown environment to enjoy themselves--and spend money. Visitors consist of tourists, athletic spectators, theater goers, conventioners, etc. Visitors, in fact, represent the vast majority of potential retail sales in the downtown area.

Based on summary data available from the St. Louis Convention and Visitors Commission, we estimate that downtown St. Louis attracts about 16,000,000 visitors a year. Also using the same source, we estimate that each of these visitors should be willing to spend an average of \$13.42 per visit for eating and drinking plus another \$13.24 for all other types of retail purchases. Over the course of a year, this would be able to support 1,741,200 square feet of retail space using the same average sales per square foot shown above.

#### **Potential Demand Generated by St. Louis Area Residential Shopping**

The propensity of residents to shop in downtown St. Louis declines with distance between downtown and residential neighborhoods. The following table considers four geographic areas: within one mile, between one and two miles, between two and three miles, and between three and 15 miles. Within this overall 15-mile radius reside an estimated 195,200 people (1997 estimate). This group is estimated to be willing to spend some \$81,461,000 on retail purchases in downtown St. Louis in the course of a year. Again at \$245 per square foot in sales, residents within 15 miles of downtown should be able to support about 332,600 square feet.

#### **Potential for Changes in the Retail Space Inventory**

As noted above, this combined floor area which should be supportable by current numbers of downtown workers and visitors plus area residents is 2,460,400 square feet. This is not to say that downtown is presently capturing all of the necessary sales to justify this supply of floor area, but it points out the *potential*. In fact, the Downtown Partnership's survey indicates that there are just 2,136,600 *occupied* retail square feet in the downtown area. This suggests that downtown is, indeed, failing to capture its potential--by almost 325,000 square feet.

This failure may be attributable to a number of factors which, in this paper, can only be speculated upon. One, clearly, is that downtown is simply failing to attract all the people that it should be able to attract, particularly among nearby residents. Moreover, the kinds of retail goods and services which people would like to buy may not be available or may not be conveniently available. For instance, a great deal of downtown's retail space is "hidden" in office buildings and has little or no face on the street. While office workers might patronize such facilities, visitors to the downtown area would not know that the spaces even existed. Many visitors are also downtown in the evenings and on weekends when most of downtown's retail stores are closed.

The demand potential also excludes any potential growth in the market segments. If downtown can attract more workers, there could be more shopping. If downtown could attract more visitors to more conventions or riverfront attractions or festivals, there could be more shopping. If the City of St. Louis could attract more residents and if residents once again considered downtown as a principal shopping area, there could be more shopping. Furthermore, a more coordinated retail environment with more accessible locations and hours could lead to more sales even within the current shopping base.

These are the challenges which face downtown planners; successful meeting of those challenges can surely lead to more retail sales and more retail floor area.

**Potential Retail Demand Estimate  
DOWNTOWN ST. LOUIS**

**All Retail, including Restaurants**

<b>Downtown Workers</b>	88,100
<i>Potential Annual Spending - Downtown</i>	\$21.50 per week per person
<i>Potential Annual Spending - Downtown</i>	\$1,075 per year per person
Available to be spent	\$94,708,000 per year by all workers
Sales per square foot	\$245 per year
Supportable square feet	386,600 square feet

**Visitors to Downtown St. Louis**

Estimated Visitors	16,000,000 per year
Expenditures for food, per visitor	\$ 13.42
Expenditures for other retail, per visitor	\$ 13.24
Dollars available for retail purchases	\$426,600,000
Sales per square foot	\$245 per year
Supportable square feet	1,741,200 square feet

**Resident Shopping in Downtown**

Population	195,191 within 15 miles
Per Capita Income	\$ 11,672
Total Income	\$ 2,278,180,000
Proportion of Income for Retail Sales	45% blended average
Dollars available for Retail Purchases	\$ 1,031,730,000
Share for Typical Downtown Retail	75%
Dollars Available for Downtown Retail	\$ 773,799,000
Capture Rate for Downtown Spending	11% blended average
Downtown Spending Potential	\$ 81,461,000
Average sales per square foot	\$ 245 per year
Supportable square feet	332,600

**TOTAL RETAIL SPACE POTENTIAL**

Current Retail Space Inventory	2,460,400 square feet
Occupied Retail Space Inventory	3,096,500 square feet
<i>Occupancy Rate</i>	2,136,600 square feet
<b>Potential Added Occupancy</b>	69%
	<b>323,800 square feet</b>

**Potential Housing Unit Demand**

The office market analysis focused on employment growth and the need for floor area to accommodate future growth potential. A separate, although related, component of future growth potential is the housing market. For many years, downtown has been recognized as place where housing is in short supply, particularly for people seeking to living in dense and diverse urban environments. If downtown sets as a goal to become a 24-hour city with added retail and entertainment space as well as office space for "daytime" activity, a substantial increase in the amount and variety of housing is required.

Indeed, two recent studies confirm the opportunities for downtown housing. In 1994, Development Strategies assisted Downtown St. Louis, Inc. (which has since become the Downtown Partnership) in surveying downtown employees about their desire to reside downtown. The study concluded that a

minimum of about 8,000 housing units in four downtown areas could be supported: Laclede's Landing, the Loft District, Cupples Station area, and the Union Station area.

In early 1998, a second study commissioned by St. Louis 2004 confirmed these earlier findings and helped set the stage for strategically developing housing in the downtown area. This study, by Zimmerman-Volk Associates, looked at three of the same areas—Laclede's Landing, the Loft District, and Cupples Station—while switching the focus from Union Station to an area on the south side of downtown around the Eugene Field House. Summarized findings of the Zimmerman-Volk Study are on the following table.

#### **Summary of Zimmerman-Volk Associates Report**

Zimmerman-Volk Associates (ZVA) identified four potential "first wave" sites for market-rate housing (Laclede's Landing, Washington Avenue Loft District, Cupples Station, and the Eugene Field House neighborhood). The four areas do not, however, address site specific development issues such as ownership objectives, site condition and environmental liability, nor financial feasibility. The core premise underlying ZVA's housing strategy is that "to retain existing households, or attract new ones, a city must provide appropriately-located, newly-constructed housing units." (ZVA, p.2 ). The four sites were chosen based on meeting the following criteria:

1. Advantageous adjacency
2. Building/land availability (assumes, for instance, that parking lots are excellent areas for residential construction)
3. Potential for expansion (housing should not be viewed as "stand-alone" project)
4. Anchors/linkages

The target market methodology identified types of households with a typical affinity for city living. The primary "draw" areas for downtown housing markets were defined as St. Louis City and St. Louis, Jefferson, St. Charles and St Clair counties. The report identified a pool of 9,290 urban-oriented households that currently live in these draw areas. ZVA predicts that a capture rate of 10 percent of the potential market—930 households in 1997/98—is quite achievable and that the "four "first wave" housing initiatives could attract up to 469 households a year to Downtown." (ZVA, p. 6).

Table 13 shows the housing market potential for the Downtown Study Area as a whole, and for each of the four "first wave" development areas. Shown is the depth of the potential market for market-rate housing. That is, of the 800,000 households living in St. Louis Metro Market Area, approximately 9,290 households represent the potential market for new housing units in the Downtown St. Louis Study area. Table 13 also shows the residential mixes necessary to capture the potential market. ZVA estimates that a capture rate of 10 percent of the potential market—or 930 households in 1997/98 is quite achievable. Table 14 shows a total of 469 household units, which equals a capture rate of 5 percent, which is significantly below the 10 percent capture rate (930 households) determined by ZVA.

**Table 13**  
**Annual Housing Market Potential For New Construction And Adaptive Re-Use**  
**Downtown St. Louis Study Area**

Area	Apts/ Lofts- Rental	Percent	Apts/ Lofts- For-Sale	Percent	Town- houses	Percent	Single- Family Detach	Percent	Total
STUDY AREA	2,700	29%	1,090	12%	910	10%	4,590	49%	9,290
Laclede's Landing	2,410	57%	990	24%	810	19%	-	-	4,210
Washington Avenue	1,400	71%	560	29%	-	-	-	-	1,960
Cupples Station	1,900	100%	-	-	-	-	-	-	1,900
Eugene Field House	2,700	42%	1,090	17%	910	14%	1,660	26%	6,360
<i>4 Areas</i> <i>TOTAL</i>	<i>8,410</i>		<i>2,640</i>		<i>1,720</i>		<i>1,660</i>		<i>14,430</i>

The above table is a replica of the table in the ZVA report. Italics represent where the table was modified by Development Strategies..

Note: Numbers indicate depth of potential market for new market-rate housing, NOT actual housing demand.

Note: While ZVA notes that the table represents the draw areas for the Downtown Study Area as a whole, and for each of the four "first wave" development areas, it does not fully explain how the four development areas relate to the study area or to each other.

ZVA estimates that the "first wave" of housing initiatives could attract up to 469 household units per year, as shown on Table 14. They also conclude that "significant additional initiatives could move forward, in addition to the 469, and still keep the capture rate around 10 percent (ZVA, p.6). The 469 units represent a 5 percent capture rate of the 9,290 potential households shown in 13.

**Table 14**  
**Forecast Annual "First-Wave" Absorption**

Area	Apts/ Lofts- Rental	Percent	Apts/ Lofts- For-Sale	Percent	Town- houses	Percent	Single- Family Detach	Percent	Total
Laclede's Landing	143	76%	20	11%	24	13%	-	-	187
Washington Ave.	60	71%	24	29%	-	-	-	-	84
Cupples Station	100	100%	-	-	-	-	-	-	100
Eugene Field House	36	37%	20	20%	24	24%	18	18%	98
<b>TOTAL</b>	<b>339</b>		<b>64</b>		<b>48</b>	<b>10%</b>	<b>18</b>	<b>-</b>	<b>469</b>

ZVA recommends that the new market-rate housing be placed within the context of the St. Louis housing market. Potential rent and sale rates are positioned to fit within the affordability range of a significant number of the target households. ZVA predicts that "once the quality of the 'civic realm' is evident, higher rents/prices at sustainable adsorption, should be achievable." (ZVA, p. 9).

<b>Table 15 Laclede's Landing Neighborhood (New Construction)</b>			
Housing Type	Rent/Price Range	Size Range	Rent/Price per sq. ft.
Courtyard Apts (Rental)	\$700-\$1,100/month	750-1,250 sf	\$.88-\$1.06 psf
Mansion Apts (Rental)	\$850-\$1,250/month	800-1,300 sf	\$.96-\$1.06 psf
Mansion Apts (For Sale)	\$130,000-\$175,000	1,250-1,700 sf	\$103-104 psf
Rowhouses	\$110,000-\$155,000	1,100-1,500 sf	\$100-\$104 psf

ZVA's report points to the 11-acre parcel adjacent to Laclede's Landing is an ideal area for the first phases.

<b>Table 16 Washington Avenue Loft District (Adaptive Re-Use/New Construction)</b>			
Housing Type	Rent/Price Range	Size Range	Rent/Price per sq. ft.
Rental Lofts	\$700-\$1,400/month	1,000-2,000 sf	\$.70 psf
For-Sale Lofts (re-use)	\$95,000-\$200,000	1,000-2,500 sf	\$80-\$95 psf
Rental Apts	\$650-\$1,050/month	750-1,250 sf	\$.84-\$1.06 psf
For-Sale Apts (new construction)	\$85,000-\$135,000	900-1,500 sf	\$90-\$94 psf

<b>Table 17 Cupples Station (Adaptive Re-Use/New Construction)</b>			
Housing Type	Rent/Price Range	Size Range	Rent/Price per sq. ft.
Rental Apts (Adaptive Re-Use)	\$500-\$1,200/month	500-1,500 sf	\$.80-\$1.00 psf
Rental Apts (new construction)	\$600-\$1,000/month	750-1,250 sf	\$.80 psf

<b>TABLE 18 EUGENE FIELD HOUSE NEIGHBORHOOD (NEW CONSTRUCTION)</b>			
Housing Type	Rent/Price Range	Size Range	Rent/Price per sq. ft.
Mansion Apts (Rental)	\$800-\$1,200/month	800-1,300 sf	\$.92-\$1.00 psf
Mansion Apts (For Sale)	\$120,000-\$165,000	1,250-1,700 sf	\$96-97 psf
Rowhouses	\$100,000-\$145,000	1,100-1,500 sf	\$96-97 psf
Single-Family Detached	\$150,000-\$195,000	1,500-2,000 sf	\$98-\$100 psf

Densities and lot widths:

- Apartment densities of up to 60 units per acre in new construction should be achievable in five to six-story courtyard buildings.
- Lots widths for the mansion builds should average 55 feet
- Lot widths for single family detached should range between 40 and 60 feet.
- Townhouse lots should average 24 feet, ranging between 20 and 28 feet wide.

**Target Market Descriptions**

ZVA uses a proprietary target market methodology to define housing markets and potential housing markets. The target market populations are derived from the housing preferences and lifestyle characteristics of households in a specific market draw area. For the purpose of the Downtown St. Louis study, ZVA determined a market draw area of 800,000 households in St. Louis City, and St. Louis, St.

Charles, Jefferson and St. Clair counties. The demographic characteristics analyzed include basic demographic data-- income qualifications, age, education level, current median home value, etc. In addition, ZVA also looked at mobility rates and lifestyle patterns to determine what populations would be good targets for urban revitalization and downtown living.

ZVA actually maintains demographic profiles of 36 "target market populations". Not all of the 36 target populations, however, are appropriate for downtown or city living. ZVA's Downtown St. Louis Study shows that the majority of downtown target households come from just nine target populations.

Table 18 contains a summary of which household types (target market populations) have the strongest propensity to live in the Downtown St. Louis Area. The table also shows in which counties these target populations currently. ZVA estimates that approximately 10,720 households have the *potential* to live in Downtown St. Louis. This number decreases to 9,290, however, when the types and mix of housing are incorporated. For more detail on population breakouts by county, see the full report.

Each of the four study areas has three appendix tables in the full report. The first table in each set breakout draw area households with the *potential* to move to the specific area (summarized below on Table 18). The second table in each set explains how the housing tenure (rent/for-sale) breaks out by household (see full report) and the third tables explain how the housing mix (flat/townhouses/single-family) for each area was determined.

Listed below are summary tables for which household types (target market populations) have the strongest propensity to live in each of the four study areas as well as the entire Downtown St. Louis area. These tables highlight the depth of the potential market and are not actual housing demand.

Household Type	St. Louis City	St. Louis County	Jefferson County	St. Charles County	St. Clair County	TOTAL
<b>Empty Nesters</b>	<b>1,010</b>	<b>3,400</b>	<b>70</b>	<b>20</b>	<b>70</b>	<b>4,570</b>
Blue-Collar Button-Downs	50	740	70	10	0	870
Post-War Pioneers	0	750	0	0	10	760
<b>Families</b>	<b>120</b>	<b>1,900</b>	<b>80</b>	<b>230</b>	<b>60</b>	<b>2,390</b>
Unibox Transferees	0	630	0	170	50	850
Full-Nest Suburbanites	0	710	0	30	0	740
<b>Younger Singles and Couples</b>	<b>1,780</b>	<b>1,960</b>	<b>10</b>	<b>10</b>	<b>0</b>	<b>3,760</b>
New Bohemians	830	100	0	0	0	150
Urban Strivers	550	110	0	0	0	660
The VIPS	0	620	0	0	0	620
<b>TOTAL</b>	<b>2,910</b>	<b>7,260</b>	<b>160</b>	<b>260</b>	<b>130</b>	<b>10,720</b>

### **WASHINGTON AVENUE LOFT DISTRICT**

Table 19 highlights which household types (target market populations) have the strongest propensity to live in the Washington Avenue study area. ZVA estimates that approximately 5,450 households have the *potential* to live on Washington Avenue. Factoring in housing type, it indicates that Washington Avenue has an "annual market potential of 1,960 units. ZVA forecasts a "first wave" absorption of 84 units. The majority of the units, 71 percent, would be in the rental loft area and 29 percent would fall under the for-sale loft area.

**Table 19**  
**Draw Area Households With Potential To Move To The Washington Avenue Loft District**

Household Type	St. Louis City	St. Louis County	Jefferson County	St. Charles County	St. Clair County	TOTAL
Empty Nesters	220	2,890	70	10	20	3,210
Blue-Collar Button-Downs	50	740	70	10	0	870
Post-War Pioneers	750	0	0	0	10	760
Families	0	0	0	0	0	0
Younger Singles and Couples	1,130	1,110	0	0	0	2,240
New Bohemians	830	100	0	0	0	930
Urban Strivers						
<b>TOTAL</b>	<b>1,350</b>	<b>4,000</b>	<b>70</b>	<b>10</b>	<b>20</b>	<b>5,450</b>

Note: This reflects potential market and not actual housing demand.

### LACLEDE'S LANDING

Table 20 highlights household types (target market populations) which have the strongest propensity to live in Laclede's Landing. ZVA estimates that approximately 9,140 households have the potential to live in Laclede's Landing. Factoring in housing type, it indicates that Laclede's Landing has an "annual market potential of 4,210 units". ZVA forecasts a "first wave" absorption of 187 units. The majority of the units, 76 percent, would be in the rental apartments and 11 percent would fall under the for-sale apartments and 13% in townhomes.

**Table 20**  
**Draw Area Households With Potential To Move To Laclede's Landing**

Household Type	St. Louis City	St. Louis County	Jefferson County	St. Charles County	St. Clair County	TOTAL
Empty Nesters	1,010	2,870	70	20	60	4,030
Blue-Collar Button-Downs	50	740	70	10	0	870
Post-War Pioneers	0	750	0	0	10	760
Families	120	1,400	0	120	40	1,680
Full-Nest Suburbanites	0	710	0	30	0	740
Unibox Transferees	0	320	0	80	30	430
Younger Singles and Couples						
New Bohemians	830	100	0	0	0	930
Urban Strivers	550	110	0	0	0	660
<b>TOTAL</b>	<b>2,700</b>	<b>6,110</b>	<b>80</b>	<b>150</b>	<b>100</b>	<b>9,140</b>

Note: This reflects potential market and not actual housing demand.

### CUPPLES STATION

Table 21 highlights household types (target market populations) which have the strongest propensity to live in Cupples Station area. ZVA estimates that approximately 6,200 households have the potential to live in Cupples Station. Factoring in housing type, it indicates that Cupples Station has an "annual market potential of 1,900 units". ZVA forecasts a "first wave" absorption of 187 units. The majority of the units, 76 percent, would be in the rental apartments and 11 percent would fall under the for-sale apartments and 13% in townhomes.

**Table 21  
Draw Area Households With Potential To Move To Cupples Station**

Household Type	St. Louis City	St. Louis County	Jefferson County	St. Charles County	St. Clair County	TOTAL
<b>Empty Nesters</b>	880	1,300	70	10	0	2,260
Blue-Collar Button-Downs	50	740	70	10	0	870
Rowhouse retirees	660	20	0	0	0	680
<b>Families</b>	120	60	0	0	0	180
Ethnic Families	120	60	0	0	0	180
<b>Younger Singles and Couples</b>	1,780	1,960	10	10	0	3,760
New Bohemians	830	100	0	0	0	930
Urban Strivers	550	110	0	0	0	660
<b>TOTAL</b>	<b>2,780</b>	<b>3,320</b>	<b>80</b>	<b>20</b>	<b>0</b>	<b>6,200</b>

Note: This reflects potential market and not actual housing demand.

### **EUGENE FIELD HOUSE NEIGHBORHOOD**

Table 22 highlights household types (target market populations) which have the strongest propensity to live in the Eugene Field House area. ZVA estimates that approximately 10,720 households have the potential to live in the Eugene Field house area. Factoring in housing type, it indicates that Eugene Field House has an "annual market potential of 6,360 units". ZVA forecasts a "first wave" absorption of 187 units. The majority of the units, 76 percent, would be in the rental apartments and 11 percent would fall under the for-sale apartments and 13% in townhomes.

**Table 22  
Draw Area Households With Potential To Move To Eugene Field House**

Household Type	St. Louis City	St. Louis County	Jefferson County	St. Charles County	St. Clair County	TOTAL
<b>Empty Nesters</b>	1,010	3,400	70	20	70	4,570
Blue-Collar Button-Downs	50	740	70	10	0	870
Rowhouse retirees	660	20	0	0	0	680
<b>Families</b>	120	1,900	80	230	60	2,390
Unibox Transferees	0	630	0	170	50	850
<b>Younger Singles and Couples</b>	1,780	1,960	10	10	0	3,760
New Bohemians	830	100	0	0	0	150
Urban Strivers	550	110	0	0	0	660
<b>TOTAL</b>	<b>2,910</b>	<b>7,260</b>	<b>160</b>	<b>260</b>	<b>130</b>	<b>10,720</b>

Note: This reflects potential market and not actual housing demand.

**Table 23**

**Target Market Descriptions**

**List of the main target populations that will move into the Downtown Study Area.**

Blue-Collar Button-Downs (county)	Median Age: 47.9, Median Income: \$42,400 Home Owners: 76%, College Educated: 41%	Median Housing value: \$84,500
Full-Nest Suburbanites	Median Age: 43.3 Median Income: \$61,100 Home Owners: 84% College Educated 64%	Median Housing Value: \$138,000
New Bohemian (currently living in City)	Median Age: 31.1 Median Income: \$34,500 Home Owners: 26% College Educated: 68%	Median Housing Value: \$203,200
Post-War-Suburban Pioneers (county)	Median Age: 59.7 Median Income: \$46,000 Home Owners: 75% College Educated 57%	Median Housing Value: \$118,500
Rowhouse Retirees (city)	Median Age: 58.7, Median Income: \$33,600 Home Owners: 44%, College Educated 35%	Median Housing Value: \$124,200
Unibox Transferees	Median Age: 42 Median Income: \$55,200 Home Owner: 72% College Educated: 66%	Median Housing Value: \$135,200
Urban Strivers (city)	Median Age: 35.8 Median Income: \$37,000 Home Owners: 50% College Educated 56%	Median Housing Value: \$146,800
VIPS(currently living in County)	Median Age: 41.9 Median Income: \$59,300 Home Owners: 67% College Educated: 73%	Median Housing Value: \$179,400

**LACLEDE'S LANDING**

**Younger Singles and Couples**

New Bohemian (currently living in City)  
VIPS(currently living in County)

**Empty Nesters and Retirees**

Rowhouse Retirees (city)  
Blue-Collar Button-Downs (county)

**WASHINGTON AVE.**

**Younger Singles and Couples**

New Bohemian (currently living in City)  
VIPS(currently living in County)

**Empty Nesters and Retirees**

Blue-Collar Button-Downs (county)  
Post-War-Suburban Pioneers (county)

**CUPPLES STATION**

**Younger Singles and Couples**

New Bohemian (currently living in City)  
Urban Strivers (city)

**Empty Nesters and Retirees**

Blue-Collar Button-Downs (county)  
Rowhouse Retirees (city)

**EUGENE FIELD HOUSE**

**Younger Singles and Couples**

New Bohemian (currently living in City)  
VIPS(currently living in County)

**Empty Nesters and Retirees**

Blue-Collar Button-Downs (county)  
Post-War-Suburban Pioneers (county)

**Families**

Unibox Transferees  
Full-Nest Suburbanites

## **Appendix D**

### **The 500 Fast Growing Companies Within Metropolitan St. Louis**

**DEVELOPMENT STRATEGIES  
THE CONCORD GROUP**

### Background of Fast 500 List

- A list of St. Louis based companies with outstanding growth in employment, sales and profit from 1989 through 1994. Compiled from Dun & Bradstreet records
- The 500 Fast Growing Companies listed by the RCGA, shows 424 companies located in St. Louis MSA (the remaining 76 companies were either out of business, or not located in the MSA).

### Industry (SIC) Breakdown in Bi-State Metropolitan Area

Percentage	#	Sector	Sic
32%	134	<b>Manufacturing</b>	<b>20-3999</b>
	43	"Advance Mfg" Electronic and other electrical equipment, medical instruments, Industrial machinery	35,36,37,38
10%	41	<b>Transportation</b>	<b>40-4999</b>
22%	91	<b>Wholesale</b>	<b>50-5199</b>
2%	9	<b>Retail Trade</b>	<b>52-5999</b>
9%	36	<b>Finance, Insurance, Real Estate</b>	<b>60-6799</b>
26%	108	<b>Services</b>	<b>70-8999</b>
17%	70	Business Services (64.8% of Services)	73
	30	Business Services--Computer Programming, data processing	737
9%	36	Engineering and Management Services (33.3% of services)	87
.5%	2	Motion Pictures and Casinos (1.9% of services)	78, 7999
		Note: growth from 1989-94 does not include most of the casino in St. Louis area	
1%	5	NO SIC code available for calculation	
100%	424		

### High Technology Industries

- Currently, the City of St. Louis has only 6 fast growing "High Technology" Companies. Of the 6, only one, a computer programming company, is listed in the downtown area.

Percentage	# in City	# in Region	Industries	SIC
22%	3	22	Industrial and commercial machinery/computer equipment	35
10%	2	10	Electronic/electrical equipment/components	36
8%		8	Transportation Equipment	37
3%		3	Measuring, Analyzing and controlling instruments	38
0%			Insurance Carriers	63
4%		4	Drug	283
8%		8	Insurance-Health and Life Insurance	631,632
31%	1	30	Computer Programming/ data processing	737
5%		5	Research, Development and Testing services	873
1%		1	Drugs-Wholesale	5122
7%		7	Engineering Services	8711
100%	6	98		

**Location Breakdown by County:  
Fastest Growing Companies vs. All Companies**

- The City of St. Louis has a higher percentage of fast growing companies than it does overall establishments. The City of St. Louis has 23% of the 500 fast growing companies and 16% of overall total employing units in the St. Louis MSA (MO portion).
- St. Louis County has over 50% of the fast growing companies located in its boundaries. Overall, it has 61% of the employing units in the St. Louis MSA (MO portion).

**Fast Growing Companies by County Compared to  
Total Number Establishments in St. Louis MSA MO Portion**

Fast 500 Breakdown	Fast 500 Companies County	% of Total establishments
11%	48 ILLINOIS	-
1%	3 Clinton	-
0%	1 Jersey	<i>Not available for Illinois Counties</i>
5%	19 Madison	-
1%	2 Monroe	-
5%	23 St. Clair	-
89%	376 MISSOURI	
6%	24 Franklin	4%
2%	9 Jefferson	6%
1%	6 Lincoln	1%
5%	20 St. Charles	10%
23%	97 St. Louis City	16%
51%	217 St. Louis County	61%
1%	3 Warren	1%
100.00%	424	

Source: MO Department of Labor "Report of Employing units for 1997"

**Sub-Area Breakdowns**

- The largest concentration of fast growing companies is in the Olive/Westport area of St. Louis County. Downtown St. Louis ranks 3<sup>rd</sup> largest with 37 companies.
- 
- The Olive/Westport area contains 66 fast growing companies. The largest concentration of industries is the Computer Programming Industry (SIC 737) with 12 companies. These 12 companies represent 40% of the Computer Programming industry. In contrast, Downtown St. Louis has only 3% of this industry.

Overall Breakdown	Breakdown Within county	FAST 500 Companies	Areas	County
16%	30%	66	Olive/Westport	St. Louis County
10%	20%	44	Clayton/MidCounty	St. Louis County
9%	38%	37	Downtown	St. Louis City
8%	16%	35	Bridgeton/Northwest	St. Louis County
7%	30%	29	Remainder of City	St. Louis City
5%	9%	19	Manchester	St. Louis County
4%	8%	17	South County	St. Louis County
4%	16%	16	Central Corridor (63110)	St. Louis City
4%	15%	15	Far North (63147)	St. Louis City
3%	7%	14	Chesterfield	St. Louis County

3%	7%	14	Airport/North	St. Louis County
2%	45%	9	St. Charles	St. Charles County
2%	40%	8	O'Fallon	St. Charles County
1%	2%	4	Far North	St. Louis County
1%	2%	4	Remainder of St. Louis County	St. Louis County
1%	15%	3	St. Peters	St. Charles County
21%	Na	90	Remainder of Region	St. Louis Region
100%		424		

### City of St. Louis

Overall Breakdown	Breakdown Within City	#	Sector	SIC
7%	31%	30	Manufacturing	20-3999
3%	13%	13	Transportation	40-4999
6%	28%	27	Wholesale and Retail Trade	50-5999
1%	6%	6	Finance, Insurance, Real Estate	60-6799
5%	20%	20	Services	70-8999
	1%	1	NO SIC	
		97	TOTAL	

### DOWNTOWN ST. LOUIS (Zipcodes--63101, 63102, 63103, part of 63104 and 63106)

- Downtown St. Louis has 37 fast growing companies. Thirty-eight percent of the fast growing companies are in the services area and 24% are in manufacturing.

%Breakdown	# Companies	Type	SIC
24%	9	Manufacturing	20-3999
3%	1	Transportation	40-4999
19%	7	Wholesale	50-5199
0%	0	Retail Trade	52-5999
16%	6	FIRE	60-6799
38%	14	Services	70-8999
	16%	6 Business Services	73
	5%	2 Motion Picture/Recreation	78.7999
	22%	8 Engineering and Management	87
100%	37	TOTAL	

### St. Louis County

- 117 Fast Growing Companies in St. Louis County

%Breakdown	Within County	# Companies	Type	SIC
11.56%	22.58%	49	Manufacturing	20-3999
3.07%	5.99%	13	Transportation	40-4999
10.85%	21.20%	46	Wholesale	50-5199
0.94%	1.84%	4	Retail Trade	52-5999
6.13%	11.98%	26	FIRE	60-6799
18.63%	36.41%	79	Services	70-8999

6.13%	11.98%	26	Computer Programming	737
1.65%	3.23%	7	Advertising	7311
1.89%	3.69%	8	Misc. Business Services	
1.89%	3.69%	8	Engineering/arch services	871
2.59%	5.07%	11	Management and Business consulting	8741,8742,8748

## Notes

### Background Of Fast 500 List

- A list of St. Louis based companies with outstanding growth in employment, sales and profit from 1989 through 1994. Data compiled from Dun & Bradstreet records.
- The 500 Fast Growing Companies listed by the RCGA, shows 424 companies located in St. Louis Region (the remaining 76 companies were either out of business, or not located in the St. Louis Region).
- 25 companies of the 424 do not provide employment figures.
- 38 companies of the 424 do not provide sales figures.
- 155 companies of the 424 do not provide sales growth rates
- 103 companies of the 424 do not provide employment growth

**DOWNTOWN ST. LOUIS FAST GROWING COMPANIES**

COMPANY	ZIP	SIC	PRODUCT	Est.	(million)			Total	St. Louis	Employ	Employ	Growth
					NetWorth	Sales	Growth					
Adstat, Inc.	63102	7335	Commercial photography	1987	na	\$1.0	67%	27	27	na	93%	
Boatman's Bancshares, Inc.	63166	6022	State commercial banks	1969	\$1,949.3	\$2,294.2	60%	14169	2000	2000	59%	
Bouras Mop Manufacturing Co., Inc.	63104	2392	Mops, floor and dust	1904	\$1.2	\$3.6	50%	55	55	na	na	
Cervantes Convention Center At Americas Center	63101	7389	Trade show arrangement	1977	\$0.4	\$5.5	128%	95	95	na	na	
Crown Products Corporation	63103	3069	Sponge rubber and sponge rubber products	1982	na	\$1.5	0%	23	23	23	53%	
Edison Brothers Apparel Stores, Inc.	63178	5611	Clothing accessories	1972	\$136.5	\$753.3	653%	na	5000	5000	na	
Edwards, A. G., Inc.	63103	6211	Security brokers and dealers	1887	\$881.3	\$1,278.6	36%	10206	2462	2462	17%	
Epic Consulting Group Ltd.	63101	7379	Computer consultants	1990	na	\$2.5	na	47	47	47	83%	
Flagg Steel Co., Inc.	63104	5051	Steel	1971	na	\$8.0	33%	23	23	23	na	
Fleishman-Hilliard, Inc.	63102	8743	Public relations and publicity	1953	\$10.6	\$75.1	45%	703	262	262	18%	
Fleming Corporation	63102	8712	architecture, engineering,	1990	na	\$2.2	na	na	na	na	na	
Flom, Lopata & Co.	63101	8721	Accounting, auditing	1977	\$0.9	\$16.1	47%	24	24	40	60%	
Foodservice Center, Inc.	63104	5142	Packaged frozen goods	1945	\$496.3	\$2,237.6	36%	0	3000	24	83%	
General American Life Insurance Company, Inc.	63166	6311	Life insurance	1984	\$0.8	\$46.8	57%	180	30	30	na	
Hammond Sheet Metal Company, Inc.	63102	5051	Nonferrous metal sheets,	1954	\$0.5	\$35.0	75%	70	70	70	180%	
Independent Dealer Service, Inc.	63103	6411	Insurance agents	1986	na	\$7.1	675%	25	25	25	67%	
Industrial Control Concepts, Inc.	63102	8711	Consulting engineer	1990	na	\$2.2	na	35	35	20	483%	
Legal One, Inc.	63101	7334	Photocopying and duplicating	1990	na	\$2.2	na	325	104	104	na	
Mar-Cone Appliance Parts Co., Inc.	63103	5064	Appliance parts, household	1932	\$3.7	\$52.0	106%	5	2434	20	5%	
Mercantile Bank of Saint Louis National Associate	63166	6021	National commercial banks	1971	\$504.7	\$475.0	34%	375	800	800	23%	
Milnot Company, Inc.	63102	2023	Condensed milk	1993	\$1.0	\$83.0	39%	23	29	29	93%	
National General Insurance Co., Inc.	63166	6331	Property damage insurance	1966	\$25.3	\$26.0	39%	na	21	21	na	
Phoenix Creative Services, Inc.	63101	7336	Graphic arts and design	1989	\$0.2	\$2.4	na	2000	100	100	2000%	
President Casinos, Inc.	63102	7999	Gambling establishment	1992	\$108.9	\$107.0	na	7000	80	80	na	
Ralston Purina International Holding Company, Inc.	63106	2048	Prepared feeds	1942	na	\$1,412.8	na	225	1600	1600	24%	
River City Broadcasting, L.P.	63103	4833	Television broadcasting	1988	\$48.0	\$100.3	199%	22	24	24	47%	
Sigma-Aldrich Corporation	63101	5169	Chemicals, allied products	1975	\$669.0	\$851.1	40%	50	50	50	26%	
Simmons, Durham & Associates, Inc.	63101	7311	Advertising consultant	1985	na	\$33.0	0%	22	22	22	24%	
St. Louis Ostomy Distributors, Inc.	63103	5047	Medical equipment	1983	-\$0.5	\$14.5	78%	24	24	24	67%	
Star Binding Manufacturing Co., Inc.	63103	2241	Bindings, textile	1914	na	\$5.0	na	600	150	150	700%	
Swank Motion Pictures, Inc.	63103	7822	Film rental, motion picture	1992	na	\$0.0	173%	28	28	28	na	
Tabor Plastics Co., Inc.	63104	3089	Injection molding of plastics	1946	\$1.9	\$2.2	32%	42	23	23	150%	
Trendmasters, Inc.	63101	3944	Games, toys	1989	na	\$25.0	na	23	23	23	28%	
Williams Paper Co., Inc.	63103	2653	Corrugated & fiber boxes	1939	na	\$3.0	50%	23	23	23	92%	
Williams, Zane O. Signs & Displays Co., Inc.	63103	2759	Screen printing	1957	na	\$2.0	100%	25	25	25	67%	
Zabrana Engineering, Inc.	63101	8711	Engineering services	1982	\$0.2	\$1.8	260%	38	38	38	138%	
Zipatoni Company, The, Inc.	63101	8743	Sales promotion	1985	\$0.6	\$6.0	114%	38	38	38	138%	

## **Appendix E**

### **ECONOMIC POSITION OF THE CITY OF ST. LOUIS WITHIN METROPOLITAN ST. LOUIS AN EMPLOYMENT ANALYSIS 1990-2005**

### **DEVELOPMENT STRATEGIES THE CONCORD GROUP**

Due to data availability, only jobs located in the Missouri counties of the metropolitan area are included. Data do not allow isolation of sub-county level such as for downtown St. Louis.

**HISTORIC TRENDS 1990 – 1997**
**JOB GROWTH**
**TOP 30 SICs BY NUMERICAL JOB GROWTH IN THE METROPOLITAN AREA**
**REF: TABLE 1 (METRO AREA JOBS)**

➤ Total job growth for Missouri part of metro area:	60,100, up 6.1%
➤ Top 30 sectors job growth:	91,500, up 29.6%
➤ All other sectors had net decline:	(31,400), down 4.6%

**Table 1: Strongest Historic Growth Sectors - St. Louis Metro Area, 1990-1997**

Missouri Portion of Metro Area

Top 30 by Numerical Job Growth - Metro Area

SIC	Sector Description	Metro Area (Missouri Side Only)			
		1990	1997	Job Growth	Pct. Growth
All	Total Jobs	986,456	1,046,565	60,109	6.1%
799	Misc. Amusement & Recreation Services	12,374	21,020	8,646	69.9%
821	Elementary & Secondary Schools	24,713	33,121	8,408	34.0%
736	Personnel Supply Services	17,915	25,942	8,027	44.8%
737	Computer & Data Proc. Svcs.	7,459	14,050	6,591	88.4%
581	Eating & Drinking Places	65,865	71,449	5,584	8.5%
874	Management & Public Relations	4,414	9,584	5,170	117.1%
822	College and Universities	19,208	23,866	4,658	24.3%
451	Air Transportation, Scheduled	10,378	14,957	4,579	44.1%
808	Home Health Care Services	2,828	6,607	3,779	133.6%
809	Health & Allied Services, Nec	2,111	4,943	2,832	134.2%
621	Security Brokers & Dealers	5,169	7,869	2,700	52.2%
801	Offices of Physicians	10,769	13,073	2,304	21.4%
836	Residential Care	5,432	7,692	2,260	41.6%
835	Child Day Care Services	3,676	5,906	2,230	60.7%
805	Nursing & Personal Care Facilities	14,140	16,200	2,060	14.6%
871	Engineering & Architectural Services	7,216	9,065	1,849	25.6%
832	Individual & Family Social Services	4,696	6,460	1,764	37.6%
751	Auto Rentals, Leasing W/O Drivers	1,791	3,505	1,714	95.7%
804	Offices Of Other Health Practitioners	2,404	4,067	1,663	69.2%
173	Electrical Work	4,518	6,114	1,596	35.3%
632	Medical Service & Health Insurance	2,473	4,040	1,567	63.4%
596	Nonstore Retailers	1,437	2,879	1,442	100.3%
531	Department Stores	23,327	24,768	1,441	6.2%
922	Public Order and Safety	9,919	11,223	1,304	13.1%
738	Miscellaneous Business Services	12,049	13,332	1,283	10.6%
171	Plumbing, Heating, Air Conditioning	6,634	7,901	1,267	19.1%
162	Heavy Construction, Ex Highways	2,232	3,443	1,211	54.3%
175	Carpentering & Flooring	2,453	3,663	1,210	49.3%
602	Commercial Banks	12,300	13,509	1,209	9.8%
734	Services To Dwellings & Other Bldgs.	9,166	10,332	1,166	12.7%
	Total, top 30	309,066	400,580	91,514	29.6%
	All other sectors	677,390	645,985	-31,405	-4.6%

**REF. TABLE 2 (CITY OF ST. LOUIS JOBS IN TOP 30 METRO GROWTH SECTORS)**

- Total job *decline* for City of St. Louis: (23,800), down 8.5%
- Top 30 sectors job growth despite 7 sectors losing jobs 11,300, up 15.2%
- All other sectors had net decline: (35,100), down 17.1%
- In seven sectors, city growth was faster than metro growth:
  1. Miscellaneous amusement and recreation services (e.g., stadia and America's Center)
  2. Air transportation services (e.g., TWA's office relocation)
  3. Health and allied services (e.g., medical centers)
  4. Child day care services
  5. Elementary and secondary schools
  6. Carpentering and flooring (construction)
  7. Commercial banks (e.g., big downtown bank headquarters)

**Table 2: Strongest Historic Growth Sectors - St. Louis Metro Area, 1990-1997**

City of St. Louis Numbers within Metro Area Rankings  
 Top 30 by Numerical Job Growth - Metro Area

SIC	Sector Description	St. Louis City			
		1990	1997	Job Growth	Pct. Growth
All	Total Jobs	279,466	255,623	(23,843)	-8.5%
799	Amusement & Recreation Services	1,099	2,863	1,764	160.5%
821	Elementary & Secondary Schools	3,670	5,398	1,728	47.1%
736	Personnel Supply Services	3,512	4,833	1,321	37.6%
737	Computer & Data Proc. Svcs.	612	1,076	464	75.8%
581	Eating & Drinking Places	15,170	13,635	(1,535)	-10.1%
874	Management & Public Relations	1,105	1,313	208	18.8%
822	College and Universities	5,285	6,044	759	14.4%
451	Air Transportation, Scheduled	146	1,759	1,613	1104.8%
808	Home Health Care Services	764	545	(219)	-28.7%
809	Health & Allied Services, Nec	548	1,635	1,087	198.4%
621	Security Brokers & Dealers	2,684	3,903	1,219	45.4%
801	Offices of Physicians	1,923	2,136	213	11.1%
836	Residential Care	1,037	1,254	217	20.9%
835	Child Day Care Services	533	1,156	623	116.9%
805	Nursing & Personal Care Facilities	3,038	3,121	83	2.7%
871	Engineering & Architectural Services	1,805	1,992	187	10.4%
832	Individual & Family Social Services	2,472	2,865	393	15.9%
751	Auto Rentals, Leasing W/O Drivers	128	116	(12)	-9.4%
804	Offices Of Other Health Practitioners	282	262	(20)	-7.1%
173	Electrical Work	1,394	1,583	189	13.6%
632	Medical Service & Health Insurance	1,654	1,457	(197)	-11.9%
596	Nonstore Retailers	274	355	81	29.6%
531	Department Stores	3,744	3,900	156	4.2%
922	Public Order and Safety	4,338	4,662	324	7.5%
738	Miscellaneous Business Services	3,942	4,172	230	5.8%
171	Plumbing, Heating, Air Conditioning	1,423	1,078	(345)	-24.2%
162	Heavy Construction, Ex Highways	214	181	(33)	-15.4%
175	Carpentering & Flooring	237	376	139	58.6%
602	Commercial Banks	6,075	6,918	843	13.9%
734	Services To Bldgs.	4,759	4,539	(220)	-4.6%
	Total, top 30	73,867	85,127	11,260	15.2%
	All other sectors	205,599	170,496	-35,103	-17.1%

**HISTORIC TRENDS 1990 – 1997**
**RATE OF JOB GROWTH (%)**
**TOP 30 SICs BY PERCENT CHANGE IN JOBS IN THE METROPOLITAN AREA**
**REF: TABLE 3 (METRO AREA RATE OF JOB GROWTH)**

➤ Total job growth for Missouri part of metro area:	60,100, up 6.1%
➤ Top 30 sectors job growth:	40,750, up 94.4%
➤ All other sectors net growth:	19,400, up 2.1%

**Table 3: Strongest Historic Growth Sectors - St. Louis Metro Area, 1990-1997**

Missouri Portion of the Metro Area

Top 30 by Percent Job Growth - Metro Area

SIC	Sector Description	Metro Area (Missouri Side Only)			
		1990	1997	Job Growth	Pct. Growth
All	Total Jobs	986,456	1,046,565	60,109	6.1%
396	Costume Jewelry & Novelties	31	223	192	619.4%
782	Motion Picture Distribution, Services	62	349	287	462.9%
241	Logging Camps & Contractors	2	10	8	400.0%
654	Title Abstract Officers	67	267	200	298.5%
704	Organization Hotels & Lodging Places	9	31	22	244.4%
207	Fats & Oils	113	380	267	236.3%
379	Misc. Transportation Equip.	12	36	24	200.0%
829	Schools & Educational Services, nec	534	1596	1,062	198.9%
628	Security & Commodity Services	415	1001	586	141.2%
809	Health & Allied Services, Nec	2111	4943	2,832	134.2%
808	Home Health Care Services	2828	6607	3,779	133.6%
225	Knitting Mills	3	7	4	133.3%
874	Management & Public Relations	4414	9584	5,170	117.1%
473	Freight Transportation Arrangement	633	1344	711	112.3%
512	Drugs, Proprietaries, & Sundries	925	1948	1,023	110.6%
549	Misc. Food Stores	228	466	238	104.4%
253	Public Building & Related Furniture	566	1138	572	101.1%
596	Nonstore Retailers	1437	2879	1,442	100.3%
751	Auto Rentals, Leasing W/O Drivers	1791	3505	1,714	95.7%
794	Commercial Sports	656	1281	625	95.3%
961	Gov't Admin. Of Economic Programs	226	437	211	93.4%
329	Misc. Nonmetallic Mineral Prods.	163	313	150	92.0%
737	Computer & Data Proc. Svcs.	7459	14050	6,591	88.4%
639	Insurance Carriers, Nec	30	56	26	86.7%
552	Motor Vehicle Dealers (Used Only)	432	784	352	81.5%
415	School Buses	1444	2527	1,083	75.0%
965	Regulation of Misc. Business	364	623	259	71.2%
546	Retail Bakeries	1428	2439	1,011	70.8%
799	Amusement & Recreation Services	12374	21020	8,646	69.9%
804	Offices Of Other Health Practitioners	2404	4067	1,663	69.2%
	Total, top 30	43,161	83,911	40,750	94.4%
	All other sectors	943,295	962,654	19,359	2.1%

**REF. TABLE 4 (CITY OF ST. LOUIS JOBS IN TOP 30 METRO GROWTH SECTORS)**

- Total job *decline* for City of St. Louis: (23,800), down 8.5%
- Top 30 sectors job growth despite 7 of these sectors losing jobs 5,950, up 80.2%
- All other sectors had net decline: (29,800), down 10.9%
- In eight sectors, city growth was faster than metro growth:
  1. Organization hotels and lodging places (but only 11 jobs total!)
  2. Schools and educational services, nec
  3. Security and commodity services (e.g., A.G. Edwards)
  4. Health and allied services, nec (e.g., medical centers)
  5. Drugs, proprietaries, sundries warehousing
  6. Government administration of economic development programs
  7. School bus transportation services
  8. Miscellaneous amusement and recreation services (e.g., stadia and America's Center)

*Table 4: Strongest Historic Growth Sectors - St. Louis Metro Area, 1990-1997*

City of St. Louis Growth Rates within Metro Area Rankings  
 Top 30 by Percent Job Growth - Metro Area

SIC	Sector Description	St. Louis City			
		1990	1997	Job Growth	Pct. Growth
All	Total Jobs	279,466	255,623	(23,843)	-8.5%
396	Costume Jewelry & Novelties	4	4	-	0.0%
782	Motion Picture Distribution, Services	44	67	23	52.3%
241	Logging Camps & Contractors	0	0	-	na
654	Title Abstract Officers	7	10	3	42.9%
704	Organization Hotels & Lodging	1	11	10	1000.0%
207	Fats & Oils	98	317	219	223.5%
379	Misc. Transportation Equip.	0	0	-	na
829	Schools & Educational Services NEC	59	367	308	522.0%
628	Security & Commodity Services	33	201	168	509.1%
809	Health & Allied Services, NEC	548	1635	1,087	198.4%
808	Home Health Care Services	764	545	(219)	-28.7%
225	Knitting Mills	3	7	4	133.3%
874	Management & Public Relations	1105	1313	208	18.8%
473	Freight Transportation Arrangement	169	271	102	60.4%
512	Drugs, Proprietaries, & Sundries	157	453	296	188.5%
549	Misc. Food Stores	48	29	(19)	-39.6%
253	Public Building & Related Furniture	0	0	-	na
596	Nonstore Retailers	274	355	81	29.6%
751	Auto Rentals, Leasing W/O Drivers	128	116	(12)	-9.4%
794	Commercial Sports	554	943	389	70.2%
961	Gov't Admin. Of Economic Programs	180	376	196	108.9%
329	Misc. Nonmetallic Mineral Prods.	59	25	(34)	-57.6%
737	Computer & Data Proc. Svcs.	612	1076	464	75.8%
639	Insurance Carriers, Nec	0	0	-	na
552	Motor Vehicle Dealers (Used Only)	113	136	23	20.4%
415	School Buses	578	1471	893	154.5%
965	Regulation of Misc. Business	179	228	49	27.4%
546	Retail Bakeries	314	277	(37)	-11.8%
799	Amusement & Recreation Services	1099	2863	1,764	160.5%
804	Offices Of Other Health Practitioners	282	262	(20)	-7.1%
	Total, top 30	7,412	13,358	5,946	80.2%
	All other sectors	272,054	242,265	-29,789	-10.9%

## TOP 30 SICs BY NUMERICAL JOB GROWTH IN THE METROPOLITAN AREA

## REF: TABLE 5 (METRO AREA JOBS)

➤ Total job growth for Missouri part of metro area:	102,600, up 10.4%
➤ Top 30 sectors job growth:	74,100, up 18.4%
➤ All other sectors had net decline:	28,450, up 4.9%

Note: City/Downtown Projections not available

## NOTABLE SECTORS WITH POTENTIAL FOR DOWNTOWN ST. LOUIS

Eating & Drinking Places	Up 8,579 jobs
Personnel Supply Services	Up 6,852 jobs
Misc. Amusement & Recreation Services	Up 5,946 jobs
Computer & Data Processing Services	Up 3,712 jobs
Miscellaneous Business Services	Up 3,522 jobs
Services To Dwellings & Other Buildings.	Up 2,729 jobs
Management & Public Relations	Up 1,885 jobs
Engineering & Architectural Services	Up 1,783 jobs
Trucking & Courier Services, Ex. Air	Up 1,603 jobs
Department Stores	Up 1,575 jobs
Security Brokers & Dealers	Up 1,553 jobs
Hotels, Motels, & Tourist Courts	Up 1,311 jobs
Misc. Shopping Goods Stores	Up 1,291 jobs
Child Day Care Services	Up 1,161 jobs
Legal Services	Up 1,152 jobs
Mailing, Reproduction, Commercial Art, & Steno. Services	Up 1,072 jobs
Radio, TV, Computer & Music Stores	Up 1,043 jobs
Accounting, Auditing, & Bookkeeping	Up 1,035 jobs
Auto Rentals, Leasing W/O Drivers	Up 988 jobs
Misc. Nondurable Goods Distribution	Up 960 jobs

Total, above, for the Missouri Portion of Region:	49,750 jobs
City of St. Louis has about 25% of MO/Metro jobs (1997):	12,435 jobs
Downtown has about 35% of City jobs (1997):	4,350 more jobs downtown
<i>Assuming consistent proportions</i>	

Grand Total Projected Growth for Missouri Portion of Region:	102,600
Downtown's Overall Growth Potential:	8,975

**Table 5: Strongest Projected Growth Sectors - St. Louis Metro Area, 1997-2005**

Missouri Portion of the Metro Area					
Top 30 by Numerical Job Growth - Metro Area					
SIC	Sector Description	Metro Area (Missouri Side Only)			
		1997	2005	Job Growth	Pct. Growth
All	Total Jobs	986,456	1,089,047	102,591	10.4%
581	Eating & Drinking Places	71,449	80,028	8,579	12.0%
736	Personnel Supply Services	25,942	32,794	6,852	26.4%
799	Misc. Amusement & Recreation Services	21,020	26,966	5,946	28.3%
371	Motor Vehicles And Equipment	14,601	19,659	5,058	34.6%
737	Computer & Data Proc. Svcs.	14,050	17,762	3,712	26.4%
738	Miscellaneous Business Services	13,332	16,854	3,522	26.4%
808	Home Health Care Services	6,607	9,671	3,064	46.4%
801	Offices Of Physicians	13,073	16,130	3,057	23.4%
806	Hospitals	49,372	52,250	2,878	5.8%
734	Services To Dwellings & Other Bldgs.	10,332	13,061	2,729	26.4%
805	Nursing & Personal Care Facilities	16,200	18,597	2,397	14.8%
809	Health & Allied Services, Nec	4,943	7,047	2,104	42.6%
874	Management & Public Relations	9,584	11,469	1,885	19.7%
871	Engineering & Architectural Services	9,065	10,848	1,783	19.7%
753	Auto Repair Shops	5,834	7,479	1,645	28.2%
421	Trucking & Courier Services, Ex. Air	14,304	15,907	1,603	11.2%
531	Department Stores	24,768	26,343	1,575	6.4%
621	Security Brokers & Dealers	7,869	9,422	1,553	19.7%
836	Residential Care	7,692	9,205	1,513	19.7%
804	Offices Of Other Health Practitioners	4,067	5,470	1,403	34.5%
701	Hotels, Motels, & Tourist Courts	10,866	12,177	1,311	12.1%
594	Misc. Shopping Goods Stores	7,729	9,020	1,291	16.7%
832	Individual & Family Social Services	6,460	7,730	1,270	19.7%
835	Child Day Care Services	5,906	7,067	1,161	19.7%
811	Legal Services, Total	7,315	8,467	1,152	15.7%
733	Mailing, Repro., Comm. Art, & Steno. Services	4,056	5,128	1,072	26.4%
573	Radio, TV, Computer & Music Stores	3,248	4,291	1,043	32.1%
872	Accounting, Auditing, & Bookkeeping	5,263	6,298	1,035	19.7%
751	Auto Rentals, Leasing W/O Drivers	3,505	4,493	988	28.2%
519	Misc. Nondurable Goods	3,998	4,958	960	24.0%
	Total, top 30	402,450	476,591	74,141	18.4%
	All other sectors	584,006	612,456	28,450	4.9%

**PROJECTED TRENDS 1997 – 2005**

**RATE OF JOB GROWTH (%)**

**TOP 30 SICs BY PERCENT CHANGE IN JOBS IN THE METROPOLITAN AREA**

**REF: TABLE 6 (METRO AREA RATE OF JOB GROWTH)**

➤ Total job growth for Missouri part of metro area:	102,600, up 10.4%
➤ Top 30 sectors job growth:	48,900, up 28.8%
➤ All other sectors net growth:	53,700, up 6.6%

*Note: City/Downtown Projections not available*

**NOTABLE SECTORS WITH POTENTIAL FOR DOWNTOWN ST. LOUIS**

Title Abstract Officers	Up 123 jobs
Freight Transportation Arrangement	Up 513 jobs
Political Organizations	Up 10 jobs
Radio, TV, Computer & Music Stores	Up 1,043 jobs
Misc. Amusement & Recreation Services	Up 5,946 jobs
Auto Rentals, Leasing W/O Drivers	Up 988 jobs
Auto Parking	Up 282 jobs
Mailing, Reproduction Comm. Art, & Steno. Services	Up 1,072 jobs
Computer & Data Processing Services	Up 3,712 jobs
Services To Dwellings & Other Buildings	Up 2,729 jobs
Miscellaneous Business Services	Up 3,522 jobs
Personnel Supply Services	Up 6,852 jobs
Consumer Credit Reporting & Collecting	Up 577 jobs
Misc. Nondurable Goods Distribution	Up 960 jobs
Business Credit Institutions	Up 491 jobs
Mortgage Bankers & Brokers	Up 942 jobs
Personal Credit Institutions	up 306 jobs

Total, above, for the Missouri Portion of Region:	30,100 jobs
City of St. Louis has about 25% of MO/Metro jobs (1997):	7,525 jobs
Downtown has about 35% of City jobs (1997):	2,630 more jobs downtown
<i>Assuming consistent proportions</i>	

Grand Total Projected Growth for Missouri Portion of Region:	102,600
Downtown's Overall Growth Potential:	8,975

**Table 6: Strongest Projected Growth Sectors - St. Louis Metro Area, 1997-2005**

Missouri Portion of the Metro Area					
Top 30 by Percent Job Growth - Metro Area					
SIC	Sector Description	Metro Area (Missouri Side Only)			
		1997	2005	Job Growth	Pct. Growth
All	Total Jobs	986,456	1,089,047	102,591	10.4%
478	Misc. Transportation Services	242	365	123	50.8%
241	Logging Camps & Contractors	10	15	5	50.0%
808	Home Health Care Services	6,607	9,671	3,064	46.4%
654	Title Abstract Officers	267	390	123	46.1%
809	Health & Allied Services, Nec	4,943	7,047	2,104	42.6%
473	Freight Transportation Arrangement	1,344	1,857	513	38.2%
865	Political Organizations	27	37	10	37.0%
371	Motor Vehicles And Equipment	14,601	19,659	5,058	34.6%
804	Offices Of Other Health Practitioners	4,067	5,470	1,403	34.5%
769	Misc. Repair Shops & Related Services	1,924	2,547	623	32.4%
573	Radio, Tv, Computer & Music Stores	3,248	4,291	1,043	32.1%
799	Misc. Amusement & Recreation Services	21,020	26,966	5,946	28.3%
751	Auto Rentals, Leasing W/O Drivers	3,505	4,493	988	28.2%
753	Auto Repair Shops	5,834	7,479	1,645	28.2%
754	Auto Services, Ex. Repair	1,879	2,408	529	28.2%
752	Auto Parking	1,000	1,282	282	28.2%
735	Misc. Equipment Rental & Leasing	1,993	2,520	527	26.4%
733	Mailing, Repro., Comm. Art, & Steno. Services	4,056	5,128	1,072	26.4%
737	Computer & Data Proc. Svcs.	14,050	17,762	3,712	26.4%
734	Services To Dwellings & Other Bldgs.	10,332	13,061	2,729	26.4%
738	Miscellaneous Business Services	13,332	16,854	3,522	26.4%
736	Personnel Supply Services	25,942	32,794	6,852	26.4%
732	Consumer Credit Reporting & Collecting	2,184	2,761	577	26.4%
509	Misc. Durable Goods	2,458	3,097	639	26.0%
343	Plumbing & Heating Fixtures, Ex. Electric	93	117	24	25.8%
519	Misc. Nondurable Goods	3,998	4,958	960	24.0%
615	Business Credit Institutions	2,093	2,584	491	23.5%
616	Mortgage Bankers & Brokers	4,021	4,963	942	23.4%
614	Personal Credit Institutions	1,307	1,613	306	23.4%
801	Offices Of Physicians	13,073	16,130	3,057	23.4%
	Total, top 30	169,450	218,319	48,869	28.8%
	All other sectors	817,006	870,728	53,722	6.6%

**TOP 35 SICs BY LOCATION QUOTIENT IN THE METROPOLITAN AREA**

**REF: TABLE 7 (METRO AREA LOCATION QUOTIENTS COMPARED TO U.S.)  
1990 AND 1997**

- Total job growth for Missouri part of metro area: 102,600, up 10.4%
- City of St. Louis share: From 28.3% to 24.4%
- Metro St. Louis has strong location quotients (1.8 or greater) concentrated in manufacturing sectors. Of top 35 location quotient SICs, 14 are most appropriate for downtown St. Louis.

*Note: City/Downtown Location Quotients not available*

**NOTABLE SECTORS WITH POTENTIAL FOR DOWNTOWN ST. LOUIS**

<i>Sector</i>	<i>Location Quotient 1990</i>	<i>Location Quotient 1997</i>	<i>City's Share of Jobs, 1990</i>	<i>City's Share of Jobs, 1997</i>
Printing Trade Services	3.4	3.6	22.8%	14.2%
Commercial Banks	2.1	2.6	49.4%	51.2%
Colleges And Universities	2.1	2.3	27.5%	25.3%
Business Credit Institutions	1.9	2.2	40.9%	3.9%
Misc. Amusement & Recreation Services	1.9	2.1	8.9%	13.6%
Commercial Printing	2.1	2.1	29.2%	26.8%
Security Brokers & Dealers	1.8	2.1	51.9%	49.6%
Auto Rentals, Leasing W/O Drivers	1.1	2.0	7.1%	3.3%
Consumer Credit Reporting & Collecting	1.9	2.0	15.8%	10.9%
Telephone Communication	1.8	1.9	56.2%	42.0%
Mortgage Bankers & Brokers	2.7	1.9	5.5%	2.8%
Local & Suburban Transportation	2.6	1.9	76.7%	50.6%
Air Transportation Service	1.5	1.8	33.7%	32.3%
Shoe Stores	1.8	1.8	38.3%	31.1%

**Table 7: Top 35 Sectors by Location Quotients Compared to U.S. Economy**

1990 and 1997 for Metro Area and City's Job Share

SIC	Sector Description	Metro LQs (MO Side)		City's Job Share	
		1990	1997	1990	1997
All	Total Jobs	986,456	1,089,047	28.3%	24.4%
821	Elementary & Secondary Schools	5.9	6.4	14.9%	16.3%
372	Aircraft And Parts Manufacturing	5.9	5.3	0.5%	0.6%
208	Beverages Manufacturing	5.0	5.2	80.9%	78.8%
286	Industrial Organic Chemicals Mfg.	5.5	4.6	28.9%	25.5%
358	Refrigeration & Service Mach. Mfg.	4.5	3.7	29.2%	18.3%
279	Printing Trade Services	3.4	3.6	22.8%	14.2%
253	Public Building & Related Furniture Mfg.	1.9	3.0	0.0%	0.0%
602	Commercial Banks	2.1	2.6	49.4%	51.2%
278	Blankbooks & Bookbinding Mfg.	2.6	2.3	37.3%	19.1%
822	Colleges And Universities	2.1	2.3	27.5%	25.3%
284	Soaps, Cleaners, & Toilet Goods Mfg.	2.1	2.2	44.6%	47.7%
502	Furniture & Home Furnishings Distrib.	2.2	2.2	37.8%	28.8%
615	Business Credit Institutions	1.9	2.2	40.9%	3.9%
204	Grain Mill Products Mfg.	2.7	2.2	76.7%	82.2%
415	School Buses Transportation Services	1.4	2.1	40.0%	58.2%
799	Misc. Amusement & Recreation Services	1.9	2.1	8.9%	13.6%
336	Nonferrous Foundries	1.5	2.1	3.5%	1.2%
495	Sanitary Services	2.6	2.1	27.4%	26.9%
444	Water Transportation Of Freight, nec	5.0	2.1	48.0%	61.1%
259	Misc. Furniture & Fixtures Mfg.	2.3	2.1	44.5%	37.2%
275	Commercial Printing	2.1	2.1	29.2%	26.8%
314	Footwear, Ex Rubber Mfg.	3.1	2.1	8.6%	6.5%
285	Paints & Allied Products Mfg.	2.0	2.1	59.7%	49.8%
153	Operative Building Construction	1.5	2.1	1.6%	2.3%
621	Security Brokers & Dealers	1.8	2.1	51.9%	49.6%
751	Auto Rentals, Leasing W/O Drivers	1.1	2.0	7.1%	3.3%
732	Consumer Credit Reporting & Collecting	1.9	2.0	15.8%	10.9%
341	Metal Cans & Shipping Containers Mfg	3.2	1.9	55.0%	28.3%
481	Telephone Communication	1.8	1.9	56.2%	42.0%
616	Mortgage Bankers & Brokers	2.7	1.9	5.5%	2.8%
411	Local & Suburban Transportation	2.6	1.9	76.7%	50.6%
458	Air Transportation Service	1.5	1.8	33.7%	32.3%
283	Drugs Manufacturing	1.7	1.8	38.7%	38.0%
566	Shoe Stores	1.8	1.8	38.3%	31.1%
371	Motor Vehicles and Equipment Mfg.	2.1	1.8	2.9%	3.9%

## Appendix F Transportation Concepts Spreadsheet and Explanation of Projects

Project Number	OPTIONS:  ELEMENTS:	transportation concepts			
		No change	T-A	T-B	T-C
		EXISTING PLANS, EXISTING STREETS	EXISTING PLANS+NW LINK, EXISTING STREETS	TEAM MODIFIED PLANS, EXISTING STREETS	TEAM MODIFIED PLANS, ADDED ONE-WAYS
1	New I-70 Touchdown --MoDOT				
2	New I-70 Touchdown -- Team				
3	Poplar Bridge/I-44 Plans-- MoDOT				
4	SB I-70 to WB I-64 Connection	none identified	none identified	none identified	none identified
5	Replace I-70 w/Surface St, downtown				
6	Grattan to 18th Connection				
7	22nd Parkway -- City/MoDOT				
8	22nd Parkway -- Team				
9	Jefferson instead of 22nd Parkway				
10	Tucker Improvements				
11	Eads Bridge deck -- BPS				
12	Eads Bridge deck -- Team				
13	9th & 10th 2-way No. of Washington				
14	Market to One-Way (eastbound)				
15	Market as Reduced Two-Way				
16	Add Downtown Shuttle				
17	Transit "Center"				
18	Modify Spruce Ramp -- Multi-Modal				
19	Northwest Link, I-70 to 22nd				
20	Signed Truck Route on Cole				
21	Clean-up Streets, Sidewalks				
22	Manage Street-Use, Parking				
23	Parking: Enforce Zoning for Mkt. Rate				
24	Parking: Subsidy for Retail, Loft				
25	Parking: Add Angle-Parking on Wash.				
26	Pedestrian Improv., Washington				
27	Pedestrian Improv., 8th				
28	Plus One Ped Connection to Arch				
29	Zero Level Ped Connection to Arch				
30	Other Sidewalk Widening				
31	Modify Bus Routes	maybe	maybe	maybe	maybe
32	Priority for N-S MetroLink				
33	Downtown Signal System				
34	MetroLink Access at Old Post Office Area				

Revised: EDAW 18 August 1998

TDA Inc., 11-Jun-98

## Appendix F

### Transportation Concepts Spreadsheet and Explanation of Projects

Three preliminary transportation concepts were developed with differing combinations of improvement projects. These are shown on the previous table as T-A, T-B and T-C. The fourth "No Change" column refers to existing facilities and current plans of the city or the state.

**T-A.** This concept primarily was based on existing streets and existing plans, but added a freeway-type northwest link connecting the 22<sup>nd</sup> Street Parkway and the touchdown of the planned I-70 river crossing.

**T-B.** This concept mostly employed existing streets and other facilities, but modified certain current plans, including the I-70 touchdown and the Eads Bridge.

**T-C.** This is similar to T-B, but added Market to the list of one-way streets (eastbound).

Projects 1 & 2 refer to the current MoDot/IDOT plans for the new I-70 river crossing touchdown and a team-developed alternative connecting to Tucker with considerably fewer structures, and a touchdown point further north.

Project 3 refers to planned improvements on the Poplar Bridge.

Project 4 would provide a southbound I-70 to westbound I-64 connection; however, no project opportunity was identified.

Project 5 would replace the current depressed I-70 with a surface street through downtown St. Louis.

Project 6 refers to the currently planned Grattan Street to 18<sup>th</sup> Street connection.

Projects 7 & 8 refer both to the current city/MoDot plans for a 22<sup>nd</sup> Street parkway north to Delmar, and a team-developed alternative with reduced grade separation and reduced width.

Project 9 refers to the use of Jefferson as an alternative to the 22<sup>nd</sup> Street parkway

Project 10 refers to general traffic improvements to Tucker to serve the modified I-70 touchdown.

Projects 11 & 12 refer to the current BPS plans for the Eads Bridge upper deck and a team-developed alternative with reduced traffic lanes and widened pedestrian/bicycle facilities.

Project 13 refers to changing 9<sup>th</sup> and 10<sup>th</sup> to two-way streets north of Washington as they pass through residential areas.

Projects 14 & 15 made changes to Market, either making Market one-way eastbound or reducing its cross-section as a two-way street.

Project 16 would add a downtown transit shuttle. In concept, this would circulate on Washington, 20<sup>th</sup>, Market, and Memorial Drive.

Project 17 would add a transit center somewhere in the core of downtown. This would be a street-level facility providing more convenient transfers among bus routes.

Project 18 would modify or eliminate the Spruce ramp that is part of the currently planned multi-modal center.

Project 19 would provide a freeway-type northwest link connection between the I-70 touchdowns and the 22<sup>nd</sup> Street parkway.

Project 20 would provide a signed truck route on the existing or improved Cole Street.

Project 21 is a broad effort to clean up downtown pavement and/or sidewalk surfaces, pavement markings, and signing.

Project 22 would improve the management of street use (construction lane closures, for example) and the management of parking.

Projects 23 & 24 would improve enforcement of zoning requirements for market rate development projects, and provide some form of subsidy as an incentive to retail development and loft redevelopment.

Project 25 was illustrative of a concept to provide more parking in downtown by converting some of the unneeded street width to angled parking.

Projects 26 & 27 would make significant pedestrian improvements on Washington and 8<sup>th</sup>, both considered prime pedestrian corridors.

Projects 28 & 29 would improve the pedestrian connection to the Arch, either with an overhead (plus 1) or a surface level pedestrian connection (zero level).

Project 30 refers to other opportunities to improve sidewalk widths. At this point specific projects were not identified.

Project 31 refers to the potential to modify bi-state bus routes which have not yet been modified in response to MetroLink.

Project 32 refers to the objective to give high priority to a downtown north/south MetroLink as the next step after current projects are complete.

Project 33 refers to the already funded program to improve the downtown traffic signal system.

Project 34 refers to improved pedestrian access between the Post Office area and MetroLink. At this time no specific project has been identified.

## Appendix G

### City of St. Louis Downtown Development Action Plan Parking Supply and Occupancy within Core Area

11-May-98  
revised 22-May-98  
2nd revision 13-Jan-99

**Office Core District -- Memorial Dr. to 9th; Washington to Chestnut**

**Lots**

Facility #	Block #	Supply		Spaces Occupied		Utilization
		Public	Private	Public	Private	
24	99	70		70		100%
45	181	62		44		71%
46	182	110		98		89%
54	194	110		83		75%
306	172	89		89		100%

**Garages**

702	6490	1700		1650		97%
704	97	225		203		90%
705	98		142		75	53%
706	101		204		200	98%
709	115	1132		1000		88%
712	129	820		738		90%
713	130	1233		1000		81%
716	164	364		328		90%
717	182		174		151	87%
751	118	1435		1400		98%
752	100	314		314		100%
754	86		300		45	15%
757	119		250		125	50%
767	767	1000		767		77%

Totals	8664	1070	7784	596	86%
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All Spaces	9734		Count	19
			≥90%	9

## Appendix G

### City of St. Louis Downtown Development Action Plan Parking Supply and Occupancy

11-May-98  
revised 22-May-98  
2nd revision 13-Jan-99

#### *Convention Center District --Memorial Dr. to 9th; Cole to Washington*

##### **Lots**

Facility #	Block #	Supply		Spaces Occupied		Utilization
		Public	Private	Public	Private	
23	96		125		78	62%
297	95	125		100		80%
303	120		26		10	38%
20	94		38			

##### **Garages**

701	6489	179		150		
708	121	375		300		80%
711	166	255		200		78%
715	124	928		800		86%
755	137		423		328	78%

Totals		1862	612	1550	416	81%
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All Spaces		2474				
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# Exhibits and Appendices

## I. Exhibits

- **Exhibit 1:** Preliminary Market Driven Product Program City of St. Louis Downtown Development Action Plan
- **Exhibit 2:** Market Assessment of the Study Area St. Louis Downtown Development Action plan
- **Exhibit 3:** Potential Annual Demand for Market Rate Housing St. Louis MSA and Capture Potential for Downtown St. Louis, Annual Average 1997-2002
- **Exhibit 4:** Potential Annual Demand for Industrial Space by Product Segment Based on New Employment Growth and Turnover
- **Exhibit 5:** Potential Demand for Office use Based on Office Using Employment Growth and Turnover St. Louis MSA and Capture Potential for Downtown St. Louis Annual Average 1998-2005

## II. Appendices

- **Appendix A:** Employee Survey Results
- **Appendix B:** Visitor Survey Results
- **Appendix C:** Economic Position of the City of St. Louis and Downtown St. Louis within Metropolitan St. Louis and Potentials for Downtown Real Estate Development 1990-2005
- **Appendix D:** The 500 Fastest Growing Companies within Metropolitan St. Louis
- **Appendix E:** Economic Position of the City of St. Louis within Metropolitan St. Louis: An Employment Analysis 1990-2005
- **Appendix F:** Transportation Concepts Spreadsheet and Explanation of Projects
- **Appendix G:** City of St. Louis Development Action Plan Parking Supply and Occupancy within Core Area
- **Appendix H:** Pedestrian Counts Outside the Downtown Core



## Appendix G

### St. Louis Downtown Master Plan Parking Supply and Occupancy

11-May-98

#### *Busch Stadium District -- Memorial Dr. to 10th; Chestnut to Chouteau*

#### Lots

Facility #	Block #	Supply		Spaces Occupied		Utilization
		Public	Private	Public	Private	
26	107		300		296	99%
34	6469	514		317		62%
40	6464		7		4	57%
41	6466		70		64	91%
61	417	85		10		12%
62	417	28		23		82%
73	426	90		75		83%
74	434	85		85		100%
75	427	461		360		78%

#### Garages

707	6467	2770		2216		80%
710	6464	163		152		93%
721	189		39		39	100%
722	188	2332		2099		90%
758	184	450		421		94%

Totals		6978	416	5758	403	83%
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All Spaces		7394				
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## Appendix G

### St. Louis Downtown Master Plan Parking Supply and Occupancy

11-May-98  
revised 22-May-98  
2nd revision 13-Jan-99

#### *Government District -- 10th to Tucker; Chestnut to US40*

##### **Lots**

Facility #	Block #	Supply		Spaces Occupied		Utilization
		Public	Private	Public	Private	
100	437		190		173	91%
203	206	364		331		91%
204	206	75		75		100%

##### **Garages**

726	205		100			
734	206		26		20	77%
735	436		345		338	98%

Totals		439	661	406	531	94%
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All Spaces		1100				
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## Appendix G

### St. Louis Downtown Master Plan Parking Supply and Occupancy

11-May-98

revised 22-May-98

2nd revision 13-Jan-99

#### *Riverfront/Laclede's Landing*

##### **Lots**

Facility #	Block #	Supply		Spaces Occupied		Utilization
		Public	Private	Public	Private	
1	17	60		23		38%
3	27	61		41		67%
4	25	140		34		24%
5	24	215		100		47%
10	67	88		81		92%
12	66	137		112		82%
181	18	300		17		6%
183	71		53		20	38%
298	18	34		4		12%

##### **Garages**

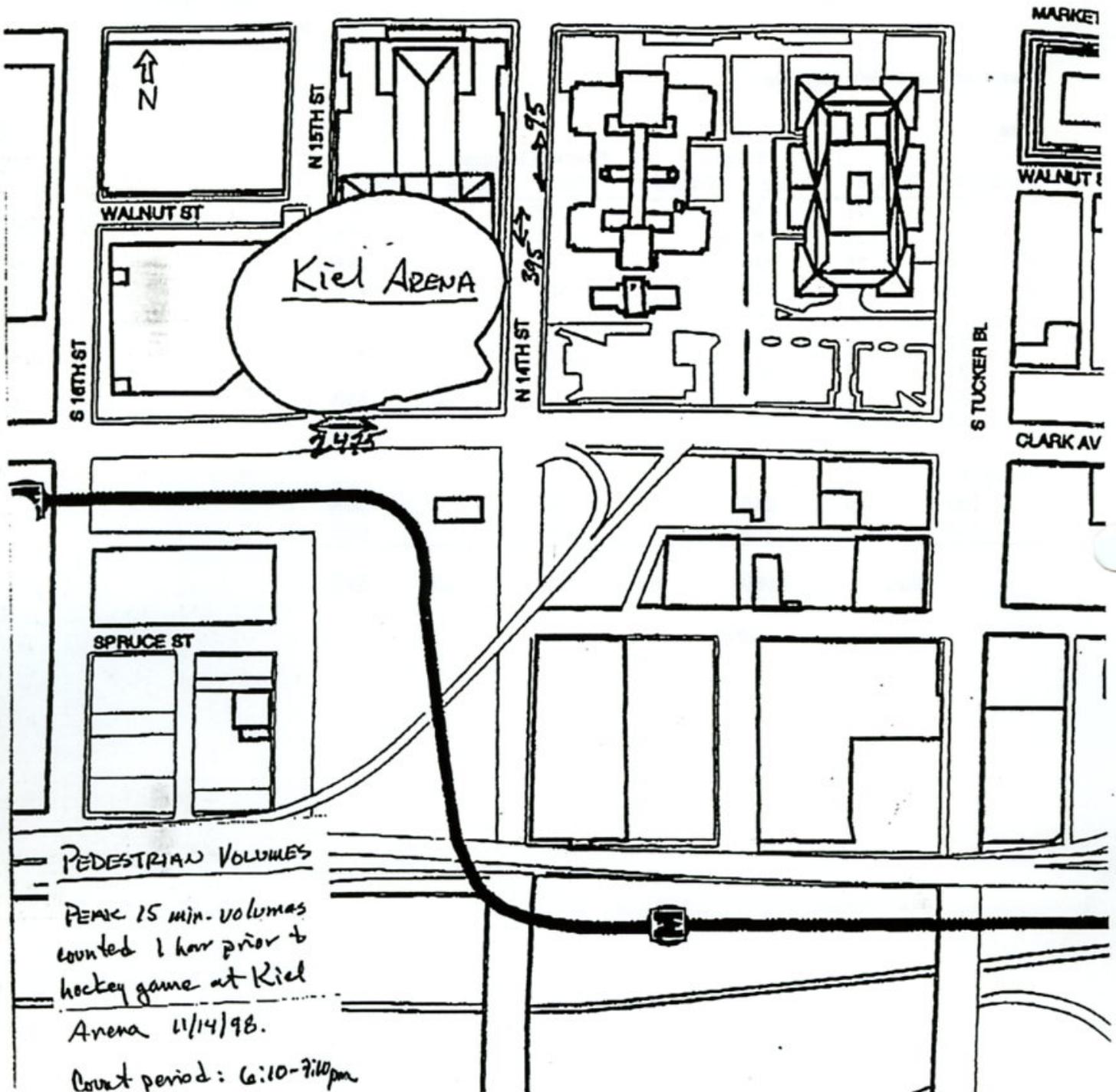
700	15	275		100		36%
753	7000	1250		844		68%

<b>Totals</b>		2560	53	1356	20	53%
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All Spaces            2613

Appendix H  
Pedestrian Counts Outside the Downtown Core

A. Event Counts at Kiel Arena



B. Pedestrian Counts Around Union Station  
(15 minute Pedestrian Volumes Taken at Mid-day)

