



June 2010

# TECHNICAL APPENDIX

Downtown Clayton Master Plan Update and Retail Strategy

FINAL DRAFT



**DOWNTOWN CLAYTON MASTER PLAN UPDATE AND RETAIL STRATEGY**

**Appendix**

1. Memoranda – Sasaki Associates and Economics at AECOM
  - Public Meeting Feedback (Sasaki)
  - Market Report (Economics at AECOM)
  - Summary of Zoning Regulations (Sasaki)
2. Presentations – Sasaki Associates
  - January Public Meeting
  - March Public Meeting
3. Downtown Clayton Action Plan – Sasaki Associates



**1. MEMORANDA**



date January 21, 2010  
to Clayton Team  
cc  
from  
project name Clayton CBD Master Plan  
project # 94425.00  
subject Community Meeting Feedback by District

Following a presentation by the consultant team, the attendees (seated at tables of 6-8 people) were asked to discuss the following questions for each of the 6 districts and then present their comments to the others.

*Discussion Questions*

1. *Does each of the principles resonate for the district?*
2. *Are we missing any principles?*
3. *Are there additional development opportunities to consider?*

The following summarizes the key points raised by each table, which were presented by a spokesperson from each table.

**TABLE 1**

**North Central**

- Agreement with overall strategy
- Concerns about traffic impacts of proposed reduction in lanes (reducing from four lanes to two lanes)
- Dining along North Central Street, especially outdoor dining, should be encouraged
- Concerns about traffic moving from Maryland Avenue to Forsyth Boulevard

**Forsyth Village**

- Agreement with the TOD concept, especially on South Forsyth, development here could include: residential, office, plaza, east gateway to the city, possibly work of public art
- Buildings to west of Famous Bar parking, on the north side of Forsyth should not to impede on neighborhood
- East of Hanley Road is good area for future development

**Park View**

- Agreement with developing park and moving the tennis courts, potential for better sense of place
- Traffic calming needed along Carondelete and Bonhomme
- Brentwood is currently difficult to cross

- Ideas for Shaw Park include: a restaurant that will draw people to park (e.g. Shake Shack), a market, and festivals
- Shaw Park should be a civic area

#### **Central Station**

- Potential for a movie theater near Metro (would take advantage of existing parking garage)
- Streetscape improvement needed in this area
- Potential for TOD / high rise / high density development.
- Suggestion to develop the parcels across from County Center for high rise apartments

#### **Maryland Gateway**

- Development here will depend on Brown Shoe
- Extend two storey buildings on Maryland between Brentwood and Forsyth

#### **Meramec Gateway**

- Opportunities to restore hotel, remodel, or redevelop office and build (much needed) residential
- Need for more diverse residential options
- Boutique hotel could go in this area

### **TABLE 2**

#### **North Central**

- Agreed with broadening walks for outdoor dining, easier movement / shopping
- Keep North Central a retail / restaurant corridor
- Concern about deliveries to restaurants, delivery management

#### **Forsyth Village**

- Walking on Hanley Road is difficult, could be more pedestrian friendly
- Public Space is good, see 'City Garden' downtown (for art / kid friendly design)
- Need a public space

#### **Central Station**

- Difficult to get to, somewhat isolated, not sure residential will be successful here
- Skepticism about putting residential here

#### **Park View**

- Keep park quiet, keep it for primarily Clayton residents (not regional festivals)
- Moving tennis courts is good, opportunity to use park with benches, places to 'hang out'
- Events in the park (Taste of Clayton, Jazz Festival) are difficult, may not be the best place for regional events
- High rise on Brentwood exists already

#### **Maryland Gateway**

- Good opportunity for gateway, for future retail

#### **Meramec Gateway**

- Great spot for more affordable housing for younger professionals

### **TABLE 3**

*General: Expressed gratitude to City of Clayton for this public meeting / process*

#### **North Central**

- Agreed with widening the sidewalks on North Central
- Redevelopment of pedestrian area, is an opportunity to increase revenue



- Potential to extend area of streetscape improvements, possibly with focus on Forsyth as well, at one of the corners
- Possible roundabout to calm traffic on Forsyth
- Current memorial (by the Police building) would be difficult to move
- Temporary kiosks are already used in proposed plaza area during the summer months

#### **Forsyth Village**

- Agreed with the concepts
- Lots of traffic around the Ritz-Carleton, opportunity to expand this area and pull activity into the city
- Wash U ownership could make it difficult to develop the area

#### **Central Station**

- No comments

#### **Park View**

- Agreed with moving the tennis courts
- Opportunity for a Shake Shack in the park
- Ice rink is underutilized most of the year, opportunity for restaurants (e.g. Rockefeller Center)
- More of a gateway along Brentwood would be great
- Brentwood traffic is a challenge

#### **Maryland Gateway**

- Not sure what else to do with Brown Shoe area

#### **Meramec Gateway**

- City encouraging movement / development here

### **TABLE 4**

#### **North Central**

- Agreed with pedestrianization of North Central Street
- Concerns about bus shelter / waiting area
- Need more parking
- Not an appealing area for housing

#### **Forsyth Village**

- Agreed with the TOD concept
- Expressed skepticism that Wash U would move forward with any development
- Potential to swap land with Wash U
- Need to accommodate parking
- Agreed with the civic space/plaza idea, could be an urban oasis like Taylor Park
- Concern about Forsyth traffic
- Shuttle needed to connect the Village with North Central, long walk

#### **Central Station**

- Parking lot often full
- Potential for trolley to connect to North Central area
- Not sure about what type of housing (or about appeal of housing ) in this area

#### **Park View**

- Agreed with moving the courts, which are currently a barrier for entry
- Need something to draw people to the park, e.g. amphitheater
- Need an organization like 'Shaw Park Forever'
- Shaw Park is a 'diamond in the rough'

- Concerns about traffic on Brentwood, light timing is an issue, crossing is an issue
- What about the Shaw Park Master Plan from several years ago? ... Not considered?

#### **Maryland Gateway**

- Further away
- No other comments

#### **Meramec Gateway**

- Resident(s) would like a bakery and gas station here
- Currently there is little retail
- Long walk to downtown
- Market exists for rental housing for young professionals (e.g. Clayton on Park)

### **TABLE 5**

#### **North Central**

- Agreed strongly with expanding the sidewalks along North Central Avenue
- Concerns about restricting traffic
- Alleys are well used for parking, but need more lighting / signage
- Agreed with the plaza concept

#### **Forsyth Village**

- Agreed with existing development plans, should move forward with those plans
- Wash U may hold on to property (lower priority)

#### **Central Station**

- Same thoughts as already mentioned by other tables

#### **Park View**

- Agree with moving tennis courts
- Agreed with making the park more of a destination for events
- Agreed with taller buildings along the park, if there is a market for them

#### **Maryland Gateway**

- Maryland Avenue is lower priority for CBD development
- Focus first on building out the core downtown area
- Concerns about residential adjacencies in this area

#### **Meramec Gateway**

- Opportunity to purchase and rehab apartment buildings is limited by monthly fees (175-200 condo)
- High condo fees make condominiums unaffordable for young people
- People would like to live in this area
- Lots of opportunity for residential along Meramec Avenue

### **TABLE 6**

#### **North Central**

- Agreed with sidewalk extension
- Concerns about traffic / delivery... could there be a middle lane?
- Okay with other concepts

#### **Forsyth Village**

- Far from downtown
- Traffic on Hanley is a barrier for connecting to Forsyth Village
- Difficult to get to from North Central

**Central Station**

- Reopen park, closed portion of road
- Keep Police Building here

**Park View**

- Police station on park is not best use of a park-side real estate
- Traffic along Brentwood traffic is an issue, should be slowed
- Shaw Park as more of a community park, not a Millennium Park with large weekly events
- Proposed a natural amphitheater, rather than a large constructed one

**Maryland Gateway**

- Agreed with the principles
- Characterized the area as more of a driving destination
- Difficult to connect Maryland Gateway with the CBD

**Meramec Gateway**

- Agreed with principles
- Needs renovation, Meramec is a 'dead' street
- Hard to connect to CBD

**TABLE 7**

**General Comments**

- Need for Trolley to connect areas
- Critical concentration of retail is needed in the CBD
- Need for signature retail / anchor retail (e.g. Library Limited)
- Need to extend retail hours





Market Report

**Clayton Downtown Master Plan**

Submitted to

**Sasaki**

**Watertown, Massachusetts**

On Behalf of

**The City of Clayton**

**Clayton, Missouri**

Submitted by

**Economics at AECOM (formerly ERA)**

**May 2010**

**Project No. 18443**

## **GENERAL LIMITING CONDITIONS**

Every reasonable effort has been made to ensure that the data contained in this report are accurate as of the date of this study; however, factors exist that are outside the control of AECOM and that may affect the estimates and/or projections noted herein. This study is based on estimates, assumptions and other information developed by AECOM from its independent research effort, general knowledge of the industry, and information provided by and consultations with the client and the client's representatives. No responsibility is assumed for inaccuracies in reporting by the client, the client's agent and representatives, or any other data source used in preparing or presenting this study.

This report is based on information that was current as of January 2010 and AECOM has not undertaken any update of its research effort since such date.

Because future events and circumstances, many of which are not known as of the date of this study, may affect the estimates contained therein, no warranty or representation is made by AECOM that any of the projected values or results contained in this study will actually be achieved.

Possession of this study does not carry with it the right of publication thereof or to use the name of "AECOM" or "Economics Research Associates" in any manner without first obtaining the prior written consent of AECOM. No abstracting, excerpting or summarization of this study may be made without first obtaining the prior written consent of AECOM. Further, AECOM has served solely in the capacity of consultant and has not rendered any expert opinions. This report is not to be used in conjunction with any public or private offering of securities, debt, equity, or other similar purpose where it may be relied upon to any degree by any person other than the client, nor is any third party entitled to rely upon this report, without first obtaining the prior written consent of AECOM. This study may not be used for purposes other than that for which it is prepared or for which prior written consent has first been obtained from AECOM. Any changes made to the study, or any use of the study not specifically prescribed under agreement between the parties or otherwise expressly approved by AECOM, shall be at the sole risk of the party making such changes or adopting such use.

This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.

## Project Overview

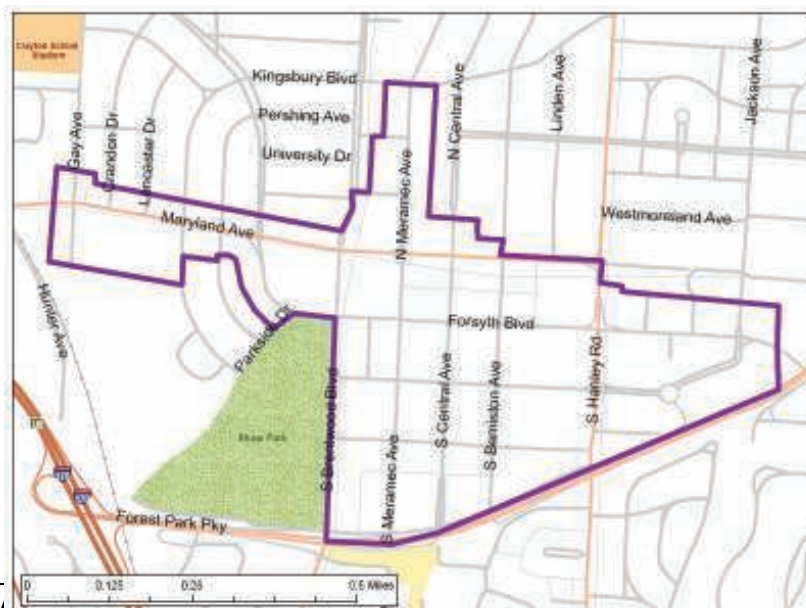
AECOM was engaged by Sasaki, through their contract with the City of Clayton, to perform economic and market analysis for the Central Business District (CBD) portion of the Business District Master Plan. This will be an update to the previous plan, completed approximately 15 years ago. AECOM's tasks as a part of this effort include:

- Collection and analysis of demographic and economic overview data for Clayton, St. Louis County, and the metro area, to understand the breadth of the available market for retail and services and the City's position within the region
- An overview of retail, office, and residential real estate market performance and activity, to place the CBD in a competitive context, and gauge its overall potential in these markets
- An inventory of downtown retail and consumer services space, with estimated square footage
- An assessment of the retail demand potential, with quantity and type, identifying gaps where the CBD can accommodate demand

In addition, AECOM will use the results of the analysis along with experience in similar plans to recommend retail clusters, identify potential sites for new retail, advise on potential tenants to fill illustrated gaps, and highlight potential barriers to development and strategies to overcome these barriers and enhance development.

The study focuses on the CBD, which is shown in the map in Figure 1, keeping in mind the larger local and regional context in which Clayton and the CBD functions.

**Figure 1: Clayton CBD Study Area**



## **Demographic and Economic Overview**

To better understand the market for real estate in Clayton, AECOM began by examining demographic and economic characteristics at several geographic levels: the Clayton CBD, the City of Clayton, St. Louis County, the St. Louis Metropolitan Statistical Area (MSA), and the nation as a whole. Viewing Clayton and the study area in comparison to these other geographies highlights its competitive context for the development of new residential and commercial real estate. AECOM started the analysis with population and household growth trends, age patterns, household income data, and county-to-county migration data to understand the origin of new households to St. Louis County. Additionally, AECOM examined industry employment statistics both to understand the County's economic snapshot as a whole and to understand the potential for future office space.

Demographic data was compiled using demographic forecasting services such as ESRI Business Analyst, Woods and Poole forecasting service, the U.S. Census Bureau, the Bureau of Labor Statistics, and other private and government data sources. Select tables and figures are included within the text with all applicable data in an appendix. All data tables are footnoted with their source information.

### **Population and Households**

In the City of Clayton, there are 15,453 residents living in 5,220 households, with an average household size of 2.96 people. While the City gained population at a rate of approximately 2 percent annually between 2000 and 2009, in the next five years, there is a projected population loss of approximately 200 people, or an overall five-year loss of 0.27 percent. While the lack of substantial growth will hinder growth-based development in Clayton, a comparison of the City with St. Louis County as a whole shows it losing a smaller share of population. The County lost population from 2000 to 2009 and is expected to do so between 2009 and 2014 as well.



**Table 1: Population and Household Data**

<b>Population</b>					
	<b>2000</b>	<b>2009</b>	<b>2014</b>	<b>00-'09 CAGR</b>	<b>09-'14 CAGR</b>
Clayton	12,825	15,453	15,246	2.09%	-0.27%
St. Louis County	1,016,315	1,002,250	991,496	-0.15%	-0.22%
St. Louis MSA	2,698,687	2,850,518	2,920,927	0.61%	0.49%
USA	278,049,507	306,109,789	320,322,004	1.07%	0.91%

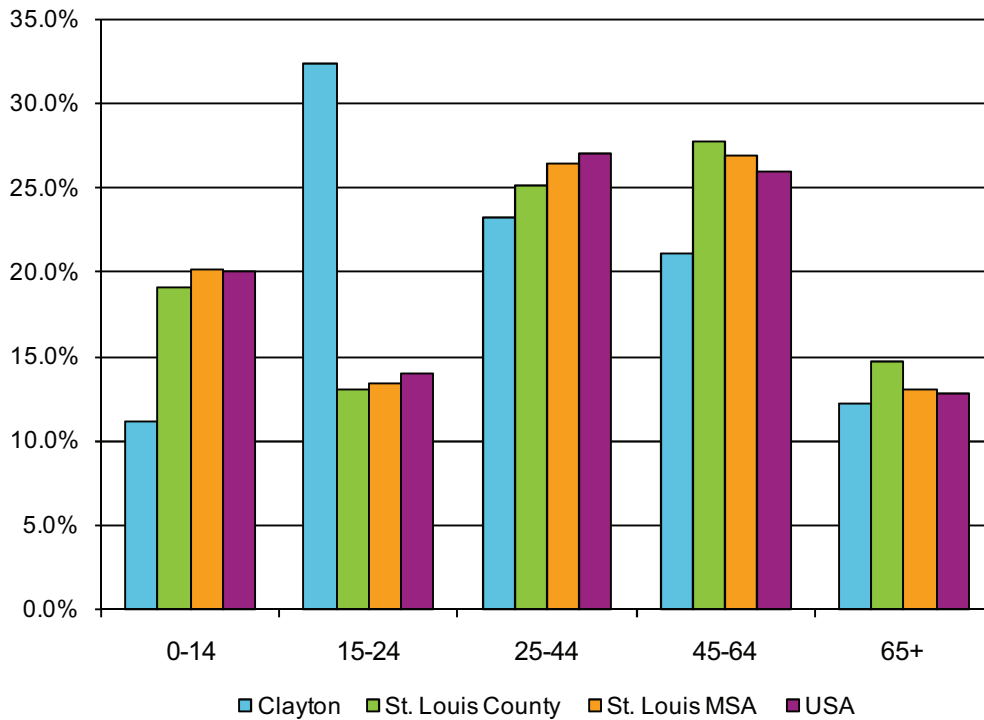
<b>Households</b>					
	<b>2000</b>	<b>2009</b>	<b>2014</b>	<b>00-'09 CAGR</b>	<b>09-'14 CAGR</b>
Clayton	5,370	5,220	5,141	-0.31%	-0.30%
St. Louis County	404,312	406,446	404,486	0.06%	-0.10%
St. Louis MSA	1,048,279	1,120,241	1,152,348	0.74%	0.57%
USA	104,281,646	115,219,232	120,757,470	1.11%	0.94%

Source: ESRI Business Analyst, 2008; AECOM 2010.

## Age

The population of the City of Clayton is slightly younger than the County and region. The median age in 2009 was 36.7, whereas the median age in the County was 39.6 and 37.8 in the MSA. Though Clayton has a smaller share of population in the 0-14 age group than the MSA and nation, the City's greater share of 15 to 24 year olds gives it a younger overall age profile, as shown in Figure 2.

**Figure 2: Population by Age, 2009**



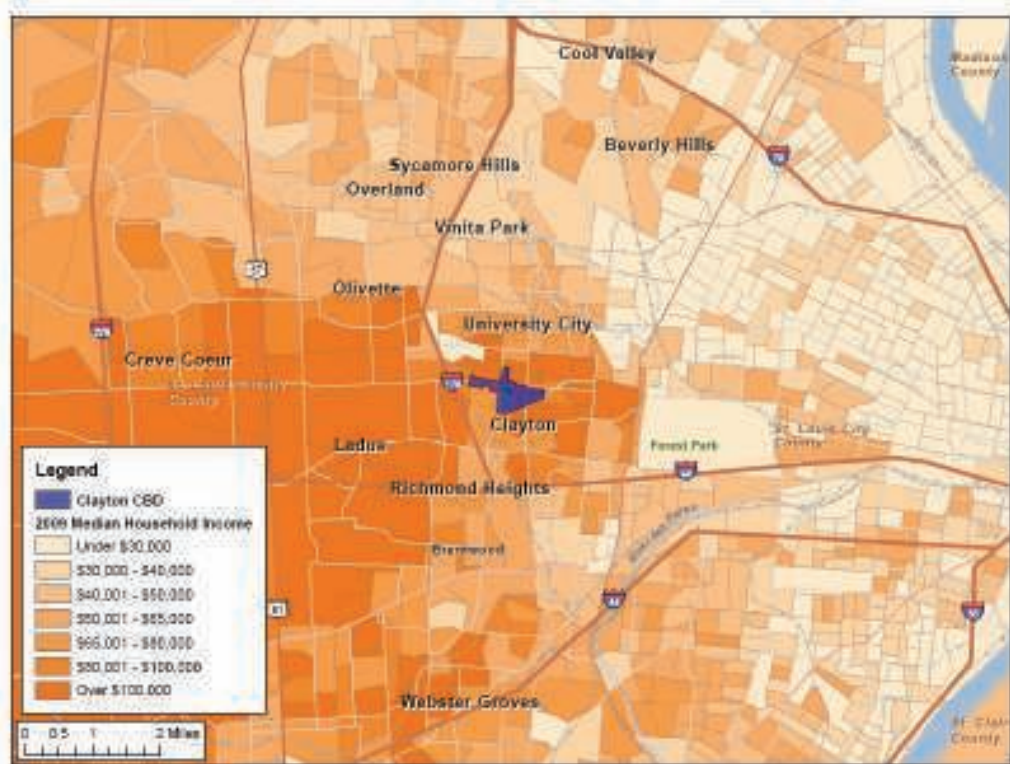
Source: ESRI; AECOM, 2010

In the next five years, through 2014, the City’s 65 and over age group will expand by about 160 persons, an 8 percent increase while other age groups are losing population. This is reflected in a slight increase in the share of population that is expected to be in this age group, growing from 12.2 percent of the population to 13.4 percent. While this is a slight share increase, it does indicate the increasing need for new services to meet a changing population.

### Household Income

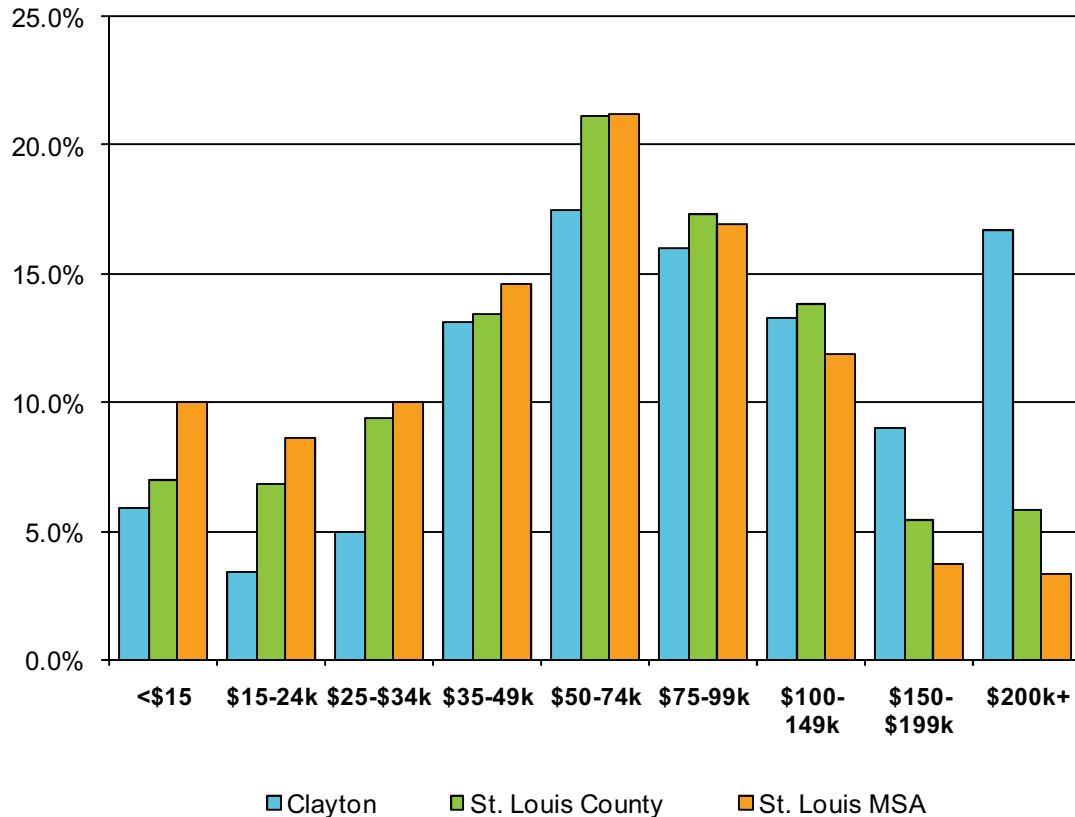
Clayton is known as one of the more affluent suburbs in the St. Louis area, and this is reflected in the income profile of its resident households, as well as in the map showing median household income by Census block group (Figure 3.) The affluent households in the immediate area provide support for retailers, restaurants, and service businesses.

**Figure 3: 2009 Median Household Incomes by Block Group**



The City's 2009 median household income of \$81,300 is significantly higher than the County's at \$65,600, the MSA's at \$57,900, and the nation's at \$54,700. The higher income of area residents indicates a generally higher amount of disposable income available for the purchases of goods and services. The City has a greater share of its households earning over \$200,000 annually than the surrounding area, as shown in Figure 4.

**Figure 4: Households by Household Income, 2009**



Source: ESRI; AECOM, 2009.

From 2000 to 2009, the median household income in Clayton increased from \$64,300 to its current level, an annual increase of 2.6 percent. Households are expected to become increasingly affluent in the next five years as well, though incomes are projected to increase at half the previous rate (or about 1 percent annually) to \$87,500. That rate of growth is consistent with the surrounding County, and at a slightly faster pace than the MSA and nation.

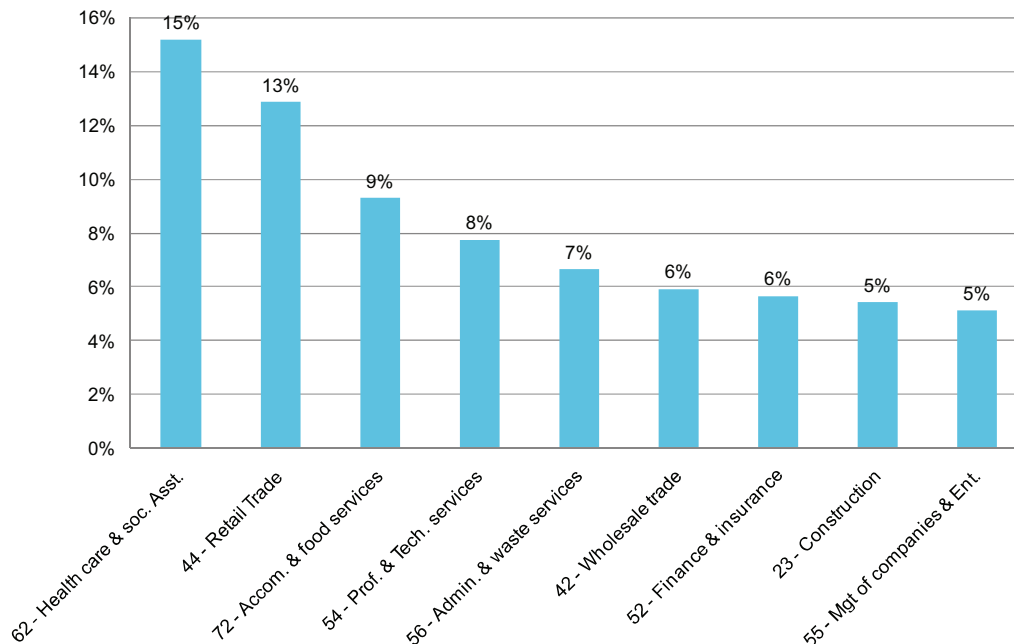
The greatest gains in households is expected to be in the category with the largest share of households (the '\$75,000 to \$99,000' range), which is projected to gain approximately 90 households, an 11 percent increase, and in the 'over \$200,000' range, with an increase of 59 households. This is a similar pattern to St. Louis County, which will have 10,600 new households in the \$75,000 to \$99,000 range and 1,500 new households in the over \$200,000 range. The County is also expected to gain 3 percent additional households in the \$100,000 to \$149,000 category and 5 percent more households in the \$150,000 to \$199,000 category.

## Educational Attainment and Employment

The City's strong income profile shown above is the result of the high paying jobs of its residents. In 2009, 92 percent of its employed residents held white collar jobs, 22 percent in management and 47 percent in professions. The City's residents are also highly educated, with 72 percent holding at least a bachelors degree. By comparison, only 27 percent of U.S. residents have received a 4-year college degree. Similarly, the MSA and County have lower educational attainment levels. MSA residents follow the nationwide average, with 27 percent having at least a college degree, while there are 39 percent of County residents achieving a 4 year degree. Put another way, though the City of Clayton represents only 1.5 percent of the County population, it has 2.4 percent of its college graduates. The occupations of the residents of the surrounding areas reflect the lower educational attainment level; 72 percent of County residents work white collar jobs, and 63 percent of MSA residents do.

These profiles of Clayton correspond to the characteristics of an attractive location for retailers and for employers; Clayton has been successful in attracting and retaining high-income employers, but has not sustained its fair share of retail offerings at the same level. Employment data for St. Louis County from the Missouri Economic Research and Information Center (MERIC) shows concentrations of employment in healthcare, retail, accommodation and food services, and professional services. The greater concentrations in professional services, finance and insurance, and management of companies and enterprises indicate concentrations of office-using industries.

**Figure 5: St. Louis County Industries with the Greatest Share of Private Employment, 2009**



The MERIC data shows a general trend toward a decrease in overall employment, from a total private employment of 558,400 in 2004 to 520,000 in 2009. The industries that are not following this trend are Health Care and Social Assistance, Management of Companies and Enterprises, and Professional and Technical Services. Again, the trend of these industries increasing indicates a positive trend for office development in Clayton.

**Table 2: St. Louis County Industries with the Greatest Growth and Loss, 2004-2009**

Fastest Growing Industries	2004	2005	2006	2007	2008	2009	2009	
							CAGR 2004-2009	Share of Private Emp
<b>2-Digit Level</b>								
22 - Utilities	715	654	747	854	940	1,003	7%	0%
62 - Health care and social assistance	69,685	70,892	75,301	76,150	77,882	78,885	3%	15%
55 - Management of companies and enterprises	25,394	26,543	27,715	27,220	27,555	26,629	1%	5%
54 - Professional and technical services	39,162	41,196	41,680	40,950	41,242	40,256	1%	8%
<b>3-Digit Level</b>								
519 - Other Information Services	16	15	17	171	210	197	65.22%	0%
515 - Broadcasting (except Internet)	600	517	536	1,244	1,268	1,553	20.95%	0%
525 - Funds, Trusts & Other Financial Vehicles	191	204	210	270	302	320	10.87%	0%
115 - Agriculture and forestry support activit	84	78	71	92	140	123	7.93%	0%
221 - Utilities	715	654	747	854	940	1,003	7.00%	0%
454 - Nonstore Retailers	1,830	1,982	2,245	2,411	2,515	2,423	5.77%	0%
523 - Financial Investment & Related Activity	3,726	3,886	4,029	4,231	4,557	4,691	4.71%	1%
622 - Hospitals	23,698	24,090	26,224	26,508	27,221	27,680	3.16%	5%
624 - Social Assistance	7,856	8,092	8,488	8,551	9,034	9,157	3.11%	2%
623 - Nursing and Residential Care Facilities	12,657	12,368	13,117	13,214	13,862	14,200	2.33%	3%
517 - Telecommunications	7,113	7,272	8,220	8,088	7,317	7,912	2.15%	2%
<b>2-Digit Industries Losing Employment</b>								
61 - Educational services	19,540	20,452	21,236	12,250	12,568	12,514	-8.53%	2%
23 - Construction	35,360	35,101	35,893	36,217	34,932	28,303	-4.35%	5%
48 - Transportation and Warehousing	19,902	19,429	18,827	NA	18,865	17,526	-2.51%	3%
81 - Other services, except public administra	21,065	20,478	20,574	20,131	19,850	19,017	-2.02%	4%
44 - Retail Trade	74,021	74,829	73,204	72,836	71,147	66,926	-2.00%	13%

Source: Missouri Economic Research and Information Center, Using Data from the Bureau of Labor Statistics Quarterly Census of Employment and Wages; AECOM, 2009

Looking ahead, MERIC only provides industry projections at the MSA level. It projects that by 2016, there will be 1.13 million employees in the MSA, a 12,000 employee increase over 2006. At the 3-digit level, the industries with the greatest numeric increase of employees include many of the faster growing industries in St. Louis County. These include: Religious, Grantmaking, Civic, Professional, and Similar Organizations; Education Employment (private + state + local); Food Services and Drinking Places; Securities, Commodity Contracts, and Other Financial Investments and Related

Activities; Professional, Scientific, and Technical Services; Hospital Employment; Ambulatory Health Care Services; Specialty Trade Contractors; Local Government, Excluding Education and Hospitals; Nursing and Residential Care Facilities; Merchant Wholesalers, Durable Goods; and Amusement, Gambling, and Recreation Industries.

Because these projections are not available for the County or local level, AECOM uses data from Woods and Poole, which provides employment projections for every county nationwide. Because of the variation in how the data is compiled (such as in counting non-employer—or self-employed—employees), the data differs from MERIC’s data, but indicates the overall trends of the economy. The data are only available for major industry categories. Between 2009 and 2025, Woods and Poole projects an increase of 169,100 jobs, with the greatest increase in the Services sector.

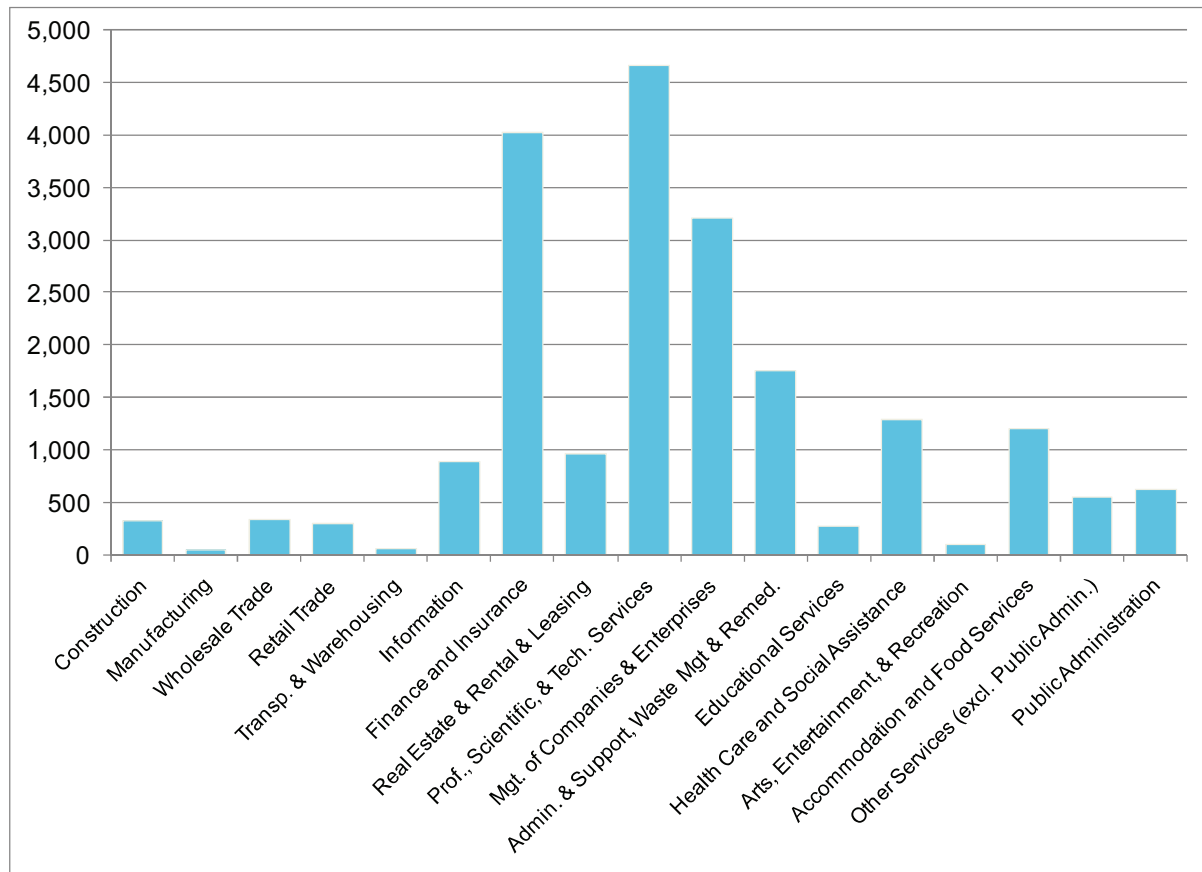
**Table 3: St. Louis County Employment Trends and Projections**

	St. Louis County					
	2000	2005	2009	2015	2020	2025
Mining and Construction	46,328	44,333	47,153	51,347	54,816	58,266
Manufacturing	87,504	72,279	72,207	71,920	71,532	71,027
Transport, Comm & Public Utilities	51,546	46,341	49,540	54,500	58,771	63,156
Wholesale and Retail Trade	180,973	184,603	191,056	200,515	208,186	215,652
Finance, Insurance & Real Estate	76,317	82,523	87,500	95,028	101,360	107,746
Services	277,287	290,238	312,304	346,104	375,002	404,631
Federal Civilian and Military Governments	10,012	9,632	9,814	10,080	10,292	10,491
State And Local Government	50,040	51,588	53,488	56,354	58,760	61,188
<b>Total</b>	<b>780,007</b>	<b>781,537</b>	<b>823,062</b>	<b>885,848</b>	<b>938,719</b>	<b>992,157</b>

Note: Includes part-time and self employed.  
 Source: Woods and Poole; AECOM, 2009

To get a better idea of the quantity and types of employees in the Clayton CBD, AECOM used the U.S. Census Bureau’s Longitudinal Employment Dynamics “On the Map” tool. Mapping the CBD study area indicates a total of just over 20,000 jobs in the CBD. It should be noted that the City of Clayton cites 35,000 persons employed in the CBD on the “Clayton Statistics” on the City’s web site. This discrepancy could be due to the Census counting only “primary jobs,” (meaning if someone has more than one job, it is the job that provides the most money)—or other methodological differences. The distribution by industry is shown in Figure 6. The concentrations in finance, professional services, and management echo the St. Louis County data and illustrate Clayton’s office cluster.

**Figure 6: Clayton CBD Employment by Industry**



## County-to County Migration

Household relocations are at the core of residential demand and can also indicate the relative health of the local economy and attractiveness of the area to new residents. While new households most directly impact residential growth, it follows that places desirable for new residents are desirable for new businesses. To better understand the quantity of households moving into St. Louis County who might be potential source markets for new residents in Clayton, AECOM reviewed IRS county-to-county migration data. This data set provides year-to-year changes in where households file their income tax returns. While this data does not conclude the exact number of people relocating, it is a useful proxy to understand broader geographic trends in population movement and the relative quantity of households moving to or from a location.

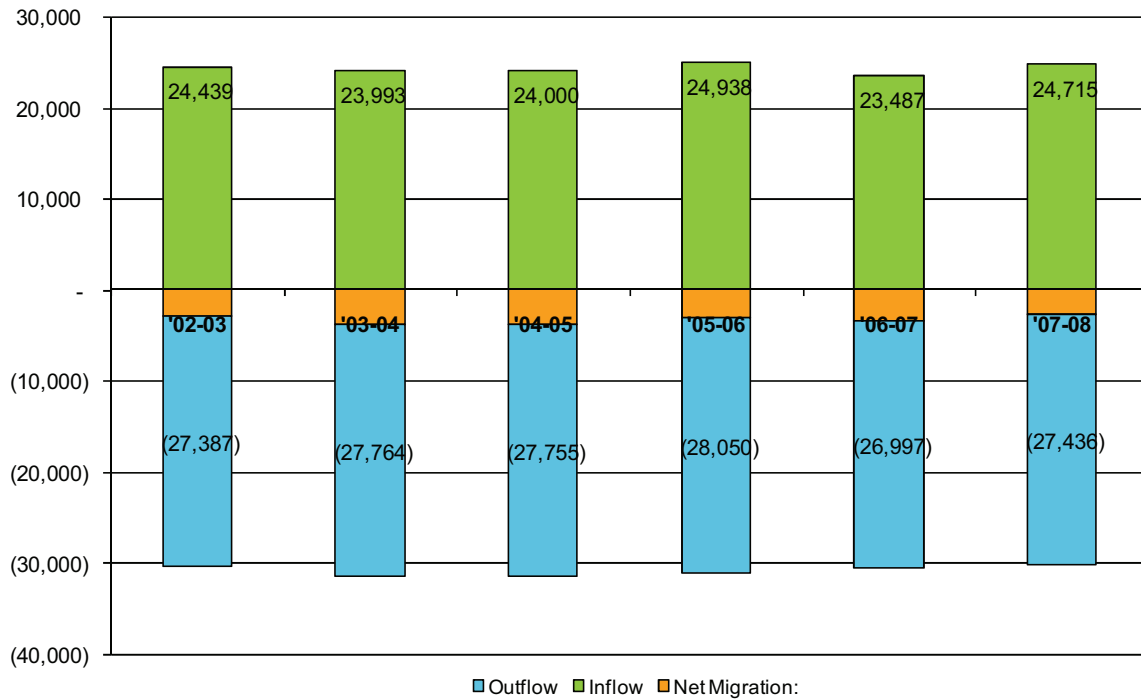
IRS migration data indicate that approximately 24,700 households relocated to St. Louis County in 2008. The highest number of households relocated from within the region, primarily from the City of



St. Louis; St. Charles County, Missouri; Jefferson County, Missouri; St. Clair County, Illinois; and Madison County, Illinois.

While some households moved to the County, others moved out. The County experienced an annual net loss of roughly 2,700 households in 2008. This was lower than the four years previous which had net outward migration of over 3,000 households annually. The average net out migration was 3,300 from 2001 to 2008. This suggests that any increases in population are from new household generation within the existing population.

**Figure 7: Net Household Migration, St. Louis County, 2002 to 2008**



Source: IRS Statistics of Income; ERA AECOM, 2009.

## **Real Estate Market Overview and Assessment**

AECOM conducted an analysis of real estate market data for the Clayton area for residential, office, and retail markets. This data will inform and influence AECOM's assessment of the residential and office markets and the retail market demand analysis.

### **Non-Retail Uses**

#### **Residential**

##### ***Key Demand and Location Characteristics***

The key variables for demand for new residential space is a supply of new residents, from an increase in overall number of households (which could be triggered by growth in an age demographic with young professionals moving into their own homes), from households moving from one area to another (in-migration), a likely scenario in Clayton because of the high quality of the public schools, or from internal market "churn," which refers to residents deciding to move from one house to another house in the same area.

An area's suitability for residential development depends upon many factors, which are many of the same factors individual households consider when purchasing or renting a home including:

- Proximity to places of employment
- Good access to roads/transit (though not typically on major thoroughfares)
- School quality and proximity (for households with school age children, in particular)
- Quality of life considerations such as an acceptable noise level, distance from undesirable uses, crime levels, etc.
- Access to area amenities such as parks and recreation facilities, retail and services, etc.

To evaluate the residential market, the analysis evaluates housing units, occupancy, and building permit census statistics, as well as listings of existing housing in Clayton and property tax assessment data.

##### ***Housing Units and Tenure***

Housing units in the City of Clayton are approximately evenly divided between owners and renters. There are approximately 725 vacant residential units in the City, for an 11 percent vacancy rate, which is twice that of the County and higher than the MSA, but only slightly higher than the nation as a whole. This is likely due to a higher proportion of renters (leaving a "frictional" vacancy as units are vacated and re-leased) and new housing units that have been under development, along with the nationwide downturn in the housing market. The number of vacant units is expected to climb

modestly in all jurisdictions in the next five years. The total number of housing units in the City is expected to remain relatively stable between 2009 and 2014.

**Table 4: Housing and Housing Tenure Data, 2000-2014**

	Owner-Occupied Housing Units				
	2000	2009	2014	00-'09 CAGR	09-'14 CAGR
Clayton	2,961	2,823	2,790	-0.53%	-0.24%
St. Louis County	299,591	299,517	297,372	0.00%	-0.14%
St. Louis MSA	751,363	803,883	829,541	0.75%	0.63%
USA	69,050,962	76,285,206	80,925,041	1.11%	1.19%

	Renter-Occupied Housing Units				
	2000	2009	2014	00-'09 CAGR	09-'14 CAGR
Clayton	2,405	2,401	2,349	-0.02%	-0.44%
St. Louis County	104,666	106,970	107,457	0.24%	0.09%
St. Louis MSA	296,919	315,589	323,098	0.68%	0.47%
USA	35,269,811	38,921,024	39,781,333	1.10%	0.44%

	Vacant Housing Units				
	2000	2009	2014	00-'09 CAGR	09-'14 CAGR
Clayton	480	725	809	4.69%	2.21%
St. Louis County	19,492	30,126	34,211	4.96%	2.58%
St. Louis MSA	84,996	121,763	129,496	4.07%	1.24%
USA	10,191,601	14,530,515	15,531,069	4.02%	1.34%

	Total Housing Units				
	2000	2009	2014	00-'09 CAGR	09-'14 CAGR
Clayton	5,846	5,950	5,948	0.20%	-0.01%
St. Louis County	423,749	436,613	439,041	0.33%	0.11%
St. Louis MSA	1,133,277	1,241,235	1,282,134	1.02%	0.65%
USA	114,512,374	129,736,745	136,237,443	1.40%	0.98%

Source: ESRI Business Analyst, 2008; AECOM 2010.

**Permits**

Perhaps not surprisingly, new residential development in Clayton has favored multifamily housing. There have been a total of 450 permits for new multifamily units in the last 10 years, and 121 for new single family units. Peak years had over 100 multifamily units permitted, but the average is 45 units annually. Of all building permits issued in Clayton, 79 percent were multifamily. In this regard, Clayton's development snapshot contrasts with St. Louis County's, in which the majority of homes

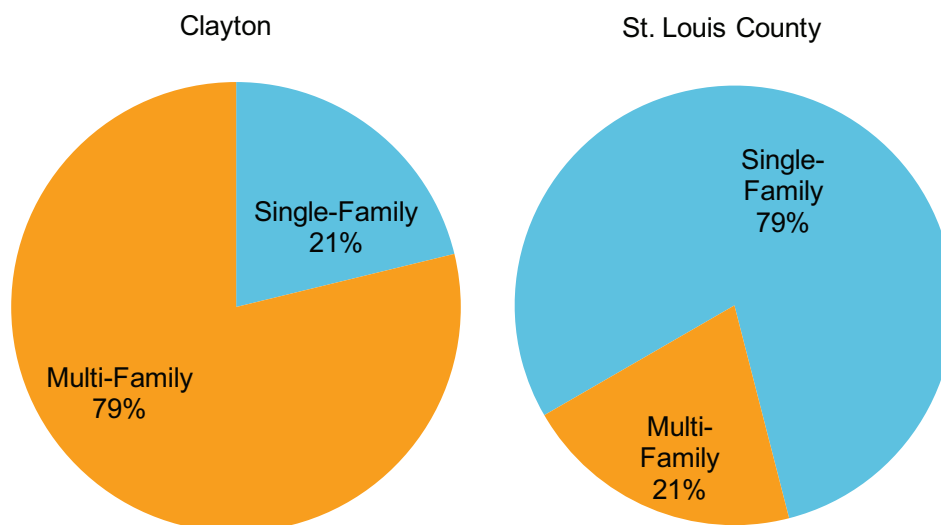
constructed are single-family. The trend toward multifamily housing may also reflect the relatively high land costs as well as the limited amount of undeveloped land within the City limits.

**Table 5: Permit Activity, 1999-2008**

	<b>Clayton</b>		<b>St. Louis County</b>		<b>St. Louis MSA</b>	
	Single-Family	Multi-Family	Single-Family	Multi-Family	Single-Family	Multi-Family
1999	15	0	2,209	673	10,591	2,149
2000	17	22	1,993	698	9,639	2,669
2001	6	110	1,868	586	10,060	1,968
2002	9	27	1,673	507	11,302	3,041
2003	14	6	1,969	288	12,489	2,581
2004	14	123	2,147	478	13,472	2,248
2005	15	32	0	386	0	2,144
2006	10	86	1,431	0	10,138	0
2007	14	44	1,234	224	8,207	2,196
2008	7	0	620	105	4,656	1,079
<b>Total</b>	<b>121</b>	<b>450</b>	<b>15,144</b>	<b>3,945</b>	<b>90,554</b>	<b>20,075</b>
<b>1999 - 2008 Avg Annl</b>	<b>12</b>	<b>45</b>	<b>1,514</b>	<b>395</b>	<b>9,055</b>	<b>2,008</b>
<b>1999-2003</b>						
Total Permitted Units	61	165	9,712	2,752	54,081	12,408
Average Annual	12	33	1,942	550	10,816	2,482
<b>2004-2008</b>						
Total Permitted Units	60	285	5,432	1,193	36,473	7,667
Average Annual	12	57	1,086	239	7,295	1,533

Source: US Census Bureau; AECOM, 2009

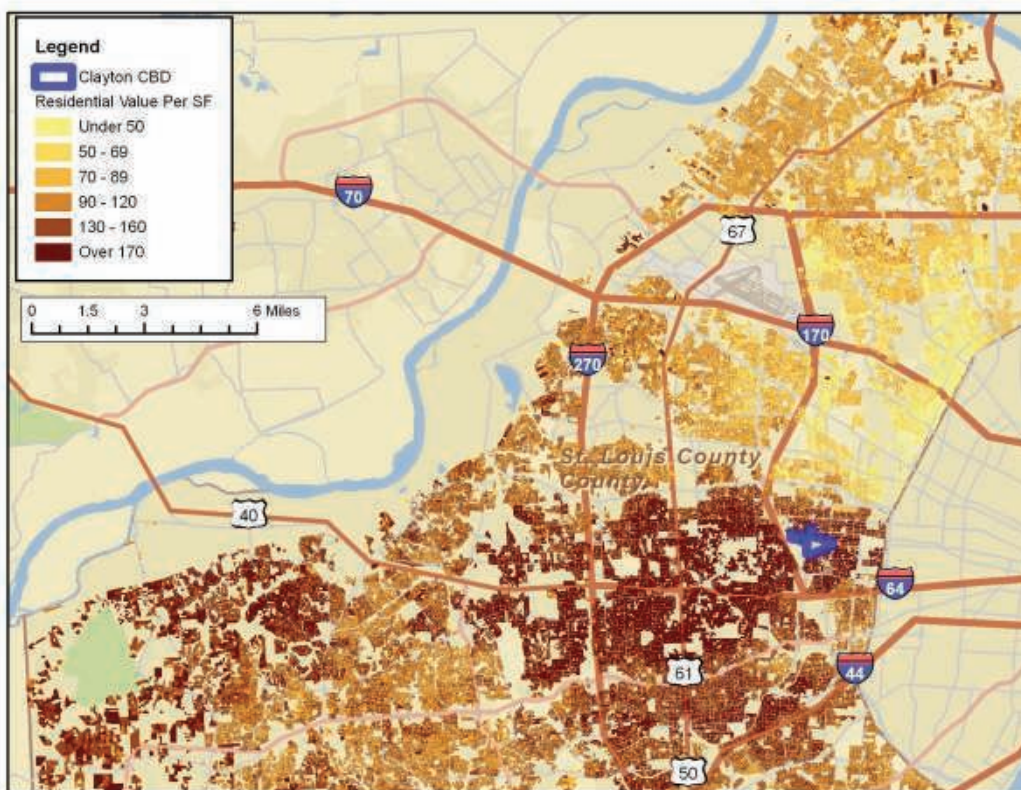
**Figure 8: Distribution of Residential Building Permits by Type**



**Assessed Values**

Using St. Louis County parcel data, AECOM created a map of total property values (the County’s estimate of market rate values) by residential square foot for residential property in the County. This map, shown in Figure 9, shows Clayton’s proximity to high residential values in the central and south of the County. Clearly, Clayton, and the suburbs going west, are highly desirable neighborhoods, as illustrated by the high market values.

**Figure 9: St. Louis County Housing Values Per Square Foot**



**Overall Demand Assessment and Planning Considerations**

The CBD of Clayton has not traditionally been a residential area, while the area around it is highly desirable as residential neighborhoods. While planning for housing is not the primary consideration for the CBD, which is likely to remain a workplace and retail center, it is important to leave open the possibility of some housing options for young professionals and others who want the feel of downtown living. Having residential options will also reinforce existing and planned retail by creating a captive market. The most competitive locations for residential would be adjoining Shaw Park, near existing retail clusters, and close to the MetroLink transit stations (over the longer term, as ridership increases and the value of proximity to transit is recognized).

## **Office**

### ***Key Demand and Location Characteristics***

Demand for new office or industrial space is affected by an increase in employment in users of the space, and the replacement of existing unsuitable space. Office and industrial buildings tend to cluster, depending on the types of use. Many users—such as law offices, government offices, accounting firms—tend to prefer downtown/central business district locations, because they offer both a high “profile” as well as a network of professionals and clients. In some office sectors, there is a symbiotic relationship between companies, and having each other within the same geographic area lends efficiency to operations. Central business districts and other clusters tend to emerge and be in demand from office users because they offer access via public transit or car to a pool of qualified workers, visibility to users and clients of the space, and access to other services. Other office and workplace concentrations may cluster around government centers and universities.

### ***Overall Office Market Assessment***

To evaluate the office market and to assess its future potential in the Clayton CBD, in addition to employment growth data shown in the demographic and economic overview above, AECOM reviewed office market performance data from CoStar, as well as other available local data. This data illustrates key metrics such as supply (in square feet), occupancy rates, rents, and absorption. To compare the Clayton CBD to other areas, AECOM examined the data for the Study Area, the Clayton Submarket (as defined by CoStar), St. Louis County, the St. Louis MSA, and the CoStar submarkets of Kirkwood/Frontenac, Brentwood/Maplewood, Crewe Coeur, and St. Louis CBD. A summary of the key data points for the third quarter of 2009 is shown in Table 6.

Downtown Clayton is a proven office concentration in the St. Louis market. The Clayton Submarket represents 8 percent of the MSA space, and the Clayton CBD represents 6 percent. The recent vacancy rates in downtown Clayton are lower than for the MSA and for most other nearby submarkets overall, indicating the resilience of the local office market. Additionally, the Clayton market has a higher sustained office rent level than many other submarkets in the greater St. Louis area.

**Table 6: Area Office Market Performance, Third Quarter 2009**

Summary Data - 3Q						
Submarket / County	Number of Buildings	Total RBA /1	Share of MSA	Vacancy Rate /2	Total Vacancy Incl. Sublet	Direct Average Rate
Study Area	114	6,942,872	5.8%	8.2%	8.8%	\$23.24/fs
Clayton Submarket	194	9,965,768	8.3%	9.7%	10.2%	\$23.46/fs
St. Louis County	2,007	61,636,273	51.4%	10.1%	10.7%	\$19.66/fs
Kirkwood/Frontenac Submarket	122	1,901,158	1.6%	7.4%	7.4%	\$21.48/fs
Brentwood/Maplewood Submarket	188	1,904,812	1.6%	12.3%	12.3%	\$18.39/fs
Crewe Coeur Office Submarket	158	3,989,830	3.3%	11.9%	12.3%	\$16.11/fs
St. Louis CBD Office Submarket	205	25,646,976	21.4%	12.8%	13.3%	\$16.87/fs
St. Louis MSA	4,855	119,956,631	100.0%	11.1%	11.6%	\$18.09/fs

1/ Rentable Building Area  
2/ Does not include Sublet Vacancy

Source: CoStar Property; AECOM, December 2009

**Overall Demand Assessment and Planning Considerations**

Demand for new office space is dependent upon growth in new employment, which translates to new users of office space. Office workers use different types of office space depending on local market characteristics and the type of business. To assess the overall market, AECOM examined employment projections by industry for St. Louis County from Woods and Poole from 2009 to 2014 and from 2014 to 2020. Because not all industry sectors utilize office space equally, AECOM applied average ratios of office users per employment sector to determine how many new employees would actually occupy office space. A square feet per employee factor is applied to determine how new office-using employment translates into office space (typically 225 square feet per private sector employee). Office replacement and frictional vacancy factors are added to account for tenant “churn” in the marketplace. This analysis suggests an average annual County-wide demand of almost 1.3 million square feet of office space (see Table 7 on the following page).

**Table 7: Estimated Countywide Office Demand, 2009-2020**

Employment Sector	% Office Users /1	Total Demand for New Space (SF)		Avg. Ann'l 2009-2020
		2009-2015	2014-2020	
Mining	10%	1,215	1,485	245.5
Construction	20%	154,980	184,455	30,857.7
Manufacturing	20%	(10,125)	(20,250)	(2,761.4)
Trans./Comm./Public Utilities	70%	649,058	804,825	132,171.1
Wholesale Trade	30%	170,168	190,823	32,817.3
Retail Trade	30%	363,150	432,135	72,298.6
Finance/Insurance/Real Estate	90%	1,269,270	1,537,380	255,150.0
Services	50%	3,161,588	3,891,938	641,229.5
Government	70%	28,980	32,918	5,627.0
<b>Demand From New Employment:</b>		<b>5,788,283</b>	<b>7,055,707</b>	<b>1,167,635</b>
Plus Vacancy Adjustment: /2		289,414	352,785	58,382
Plus Cumulative Replacement Demand: /3		289,414	352,785	58,382
<b>TOTAL DEMAND (In 000s of Sq. Ft.):</b>		<b>6,367,000</b>	<b>7,761,000</b>	<b>1,284,000</b>

1/ Reflects office-using employees in each employment sector

2/ This allows for a 5% frictional vacancy rate in new space delivered to the market

3/ This represents new space required by existing businesses to replace obsolete or otherwise unusable space. This is assumed to represent 5% of total implied demand

Source: Woods & Poole, Inc; AECOM, 2009

According to CoStar, the County's average annual absorption from 2000 to 2009's was 407,033 square feet, indicating a lower demand than the employment numbers indicate. To allow for this, AECOM has used the median demand between the employment numbers and historic market demand as represented by absorption.

**Table 8: Range of St. Louis County Office Demand Potential**

Year	Historic Market Demand /1	Median	Employment - based Demand
2009-2015	2,442,000	4,404,500	6,367,000
2015-2020	2,035,000	4,898,000	7,761,000
<b>Total 2009 - 2020 (In Sq. Ft.):</b>	<b>4,477,000</b>	<b>9,302,500</b>	<b>14,128,000</b>
<b>Average Annual (Rounded)</b>	<b>407,000</b>	<b>845,500</b>	<b>1,284,000</b>

(1) Based on average annual absorption of office space in St. Louis County.

Source: CoStar Property; Woods and Poole, 2007; AECOM, 2009

The Clayton CBD currently has 11 percent of the County's office space. If it maintains this share, it could have potential demand for up to 141,000 square feet annually between 2009 and 2020.



AECOM notes that Clayton's CBD has steadily been losing share since 2003 at a rate of approximately 0.1 percent annually. This may be a result of limited supply of new Class A space, and while this small reduction is not dramatic enough to have a large impact on demand, we considered it an indication that a more conservative estimate of projected annual office absorption should be used. Given this consideration and that the CBD's historic average absorption has been 57,000 square feet per year, AECOM would recommend that, for Master Planning purposes, estimated annual absorption of between 50,000 and 80,000 square feet is a more realistic assumption. As speculative office space within the past 6-7 years has usually been built in buildings sized between 150,000 and 200,000 gross square feet, this suggests that downtown Clayton should plan for a new building approximately every two to three years based on market demand and building efficiencies. Of course, build-to-suit and corporate relocations or expansions may vary from the average size described above.

## **Retail**

### **Key Demand and Location Characteristics**

In general, the need for new retailers and retail space is determined by an increase in new households and/or an increase in income, and the share of that income available for retail spending. Though the success of a location for retail depends on the type of retail, the basic location factors for any retail are:

- Accessibility
- Visibility
- Proximity to other retail
- Location of competition

Classification of retail happens at the store, shopping center, and cluster or district level. Individual retail stores are classified into various store types, based upon their merchandise, format and size, and their trade areas. Within each type of shopping area, individual retailers' trade areas can vary. Convenience retail and restaurants rely on an easily accessible customer base and include stores such as supermarkets, drug stores, and limited service restaurants. These stores benefit from proximity to their customers. For example, shoppers looking for groceries, except in special instances, will typically go to the closest store or the store on their route home from work. The trade area of convenience retail is often smaller than for comparison-shopping stores (which include department stores, apparel stores, hobby, book and music stores) and full-service restaurants, both of which tend to attract a specific range of age and income levels. These stores need a critical mass

of similar retail to be able to draw from a wider trade area. Often, retail and dining uses cluster together to benefit from proximity to each others' customers and the ability to draw customers from further distances/larger trade areas -- such as a large regional mall with nearby power centers drawing customers from a larger trade area than would a smaller, neighborhood-scaled strip center. These types of retailers benefit from economies of agglomeration by drawing additional customers for each other. As an example, someone shopping for antiques, home goods and furniture will go to an area where there are several antique, home goods and furniture stores from which to choose.

Individual stores can locate in downtown areas, along shopping streets in commercial districts, in shopping centers, in freestanding retail buildings, and in in-line locations such as street level retail in a downtown or urban neighborhood commercial district. Districts and clusters of shopping centers and freestanding retail are also classified by their size, trade area characteristics, and mix of store types. Shopping centers are also classified according to their size and location characteristics, most commonly using definitions established by the International Council of Shopping Centers (ICSC). The major types of shopping centers are:

**Regional and Superregional Shopping Centers:** Regional shopping centers contain between 400,000 and 800,000 square feet of shopping space. Superregional centers are larger, with over 800,000 square feet of space. The space in both types of centers is mostly dedicated to full-line department stores, fashion apparel stores, and other GAFO (General Merchandise, Apparel, Furniture, and Other retailers) stores. The tenants in these regional shopping centers are usually full-credit tenants and nationally-recognized names. A regional shopping center's primary trade area—or where it gets between 60 to 80 percent of its sales—typically covers 5 to 15 miles—and superregional centers can span to 25 miles or more depending on the region. Though most typically enclosed malls, recent trends have created open-air centers following this format.

**Community Shopping Centers:** Community shopping centers contain between 100,000-350,000 square feet of retail space, and their trade areas typically extend three to six miles. They serve a smaller population than do regional shopping centers. These can contain supermarkets and other convenience-focused retailers or be "power centers" with big and small-box retailers such as Best Buy and Home Depot. They are often found clustered near regional centers.

**Neighborhood Shopping Centers:** Neighborhood shopping centers are between 30,000 and 150,000 square feet in size and as their name implies, they serve the local neighborhood, up to three miles. They usually have a supermarket or drug store as their anchor store. Smaller centers can be a collection of service retail such as barber shops and dry cleaners and small restaurants or convenience stores.

These descriptions are useful for downtown Clayton, not because the CBD is a shopping center in the traditional sense, but because the Clayton CBD is surrounded by some of the bigger shopping center concentrations in the St. Louis market.

### **Retail Clusters and Districts**

Downtown retail and street level/mixed use retail in city neighborhoods can follow characteristics of the shopping centers above—serving customers ranging from being a regional attraction to serving the daily needs of nearby residents. A **regional shopping area** usually contains a regional shopping center, or it could contain an assortment of smaller centers or individual retailers which are able to pull from a wide area. On the other hand, **neighborhood and convenience clusters** have smaller shopping centers and a more limited assortment of shops, catering to nearby residents. Certain clusters of retail could also be classified as **specialty districts**, drawing customers from a wide trade area—though perhaps not having as large a capture rate as a regional shopping center would. These areas can focus on a particular type of retail (i.e. an antiques district, a gallery district, a “restaurant row” or “arts district”) or an entertainment cluster/destination. These areas often feature independent and local retailers, especially in the “other” category of “General Merchandise, Apparel, Furniture, and Other” (GAFO), selling books, music, stationery, jewelry, and other miscellaneous goods. Specialty retail districts often include a large number of restaurants as a percentage of the total retail mix; Clayton’s restaurant cluster on Central Avenue is an example of a successful dining district.

Healthy retail markets offer a variety of retail types and specialty clusters. Retail clusters of different sizes work symbiotically for mutual success. Smaller neighborhood centers can benefit from the increased traffic a larger center provides, but it is more challenging to address clustering if property ownership or site control is not centralized. If coordinated and managed effectively, central business districts can “fill in gaps” in undersupplied categories of retail; the rents are often lower, property owners can provide attractive incentives for older buildings because their previous investments have been amortized, and the customer base is already in place. Attracting new retailers can increase the possibility of the benefits of agglomeration from the larger trade area, as well.

### **Existing Retail Inventory Overview**

#### **Regional**

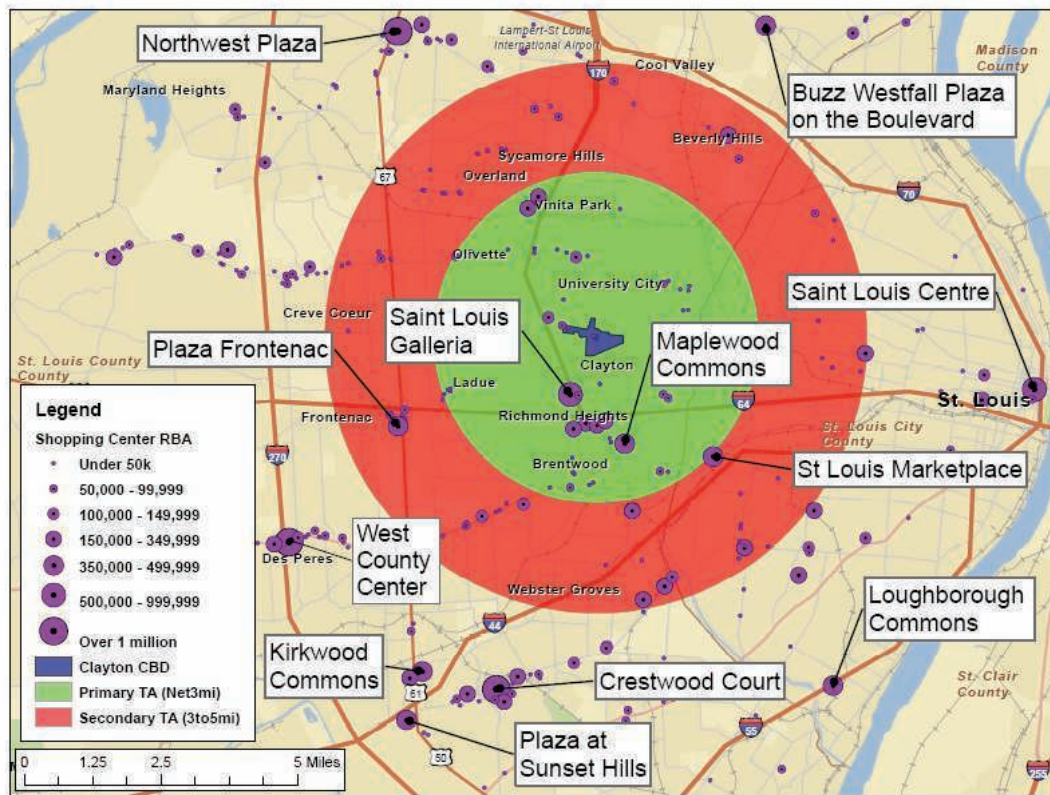
AECOM was told in stakeholder interviews that Clayton’s surrounding area is saturated with retail supply. Clayton is situated among some of the St. Louis area’s strongest retail centers. It is a part of what CoStar calls the Mid-County retail market, the largest of all submarkets in the region, with a 10 percent share of the MSA. Most of the retail growth in the St. Louis area is occurring on the metropolitan area’s fringe. There have not been many major retail projects delivered or under construction recently in the St. Louis market. During the fourth quarter 2009, a total of 93,800 square

feet was completed in the greater St. Louis market, totaling 691,400 in the year as a whole. Of the 176,100 square feet of retail space reported as 'under construction', none was in Clayton's submarket. Most construction activity is happening in suburbs further out, such as in St. Charles County and in the East Illinois markets. The planned projects are not large ones; average project size was under 20,000 square feet each.

According to CoStar, within a 10-mile radius of the Clayton CBD, there are currently three planned retail projects, all of which are 35,000 square feet or under. One is in Maryland Heights, one in University City, and one in St. Louis. Rents for these spaces are listed at between \$16 and \$24 per square foot triple net.

The map below shows shopping centers near Clayton, with those having a rentable building area (RBA) of 350,000 or over labeled. These are shown with the identified trade areas (to be discussed later in this report). Shopping centers of 350,000 square feet or more typically reflect major power centers or sub-regional malls. Significant nearby centers are discussed in more detail below.

**Figure 10: Shopping Centers Near Clayton**



**St. Louis Galleria:** This 900,000 square foot center is the closest regional mall to the Clayton CBD. It is anchored by Macy’s and Dillards, with Nordstrom scheduled to become the Galleria’s third anchor department store in 2011, replacing the former Lord and Taylor. The Galleria includes many top in-line retail tenants. Between the Galleria and the Clayton CBD, the first phase (one block long) of the Boulevard project was developed to include St. Louis’ first Crate & Barrel store and several destination chain-based restaurants; future phases are planned to provide additional ‘lifestyle’ tenants in the Boulevard’s “Main Street”-type setting.

**Maplewood Commons:** This ‘big-box’ oriented power center was built on 51 acre site at Hanley Road south of I-64/US 40 has a 142,000 square foot Walmart, a 138,000 square foot Sam’s Club, and a 135,000 square foot Lowe’s Home Improvement. The center totals 443,000 square feet, with an additional 28,000 square feet of accompanying small stores, a gas station, and two restaurant outparcels.

**Plaza Frontenac:** Though smaller than most regional malls at 440,000 square feet, the Plaza Frontenac is recognized as the ‘top tier’ retail offering in the greater St. Louis area, and has unique-

to- the-market, high-end retailers including the state’s only Neiman-Marcus, Louis Vuitton Store, Tiffany & Co. and the area’s only Saks Fifth Avenue.

### CBD Inventory

AECOM conducted a site visit and inventory over a two-day period in December to estimate the quantity, location, and type of existing retail in the Clayton CBD as well as its context to other uses and the surrounding area. The inventory analysis provides both quantitative and qualitative data to inform inputs to the retail demand model as well as direction for the retail strategy going forward, to identify current strengths and gaps that need to be filled.

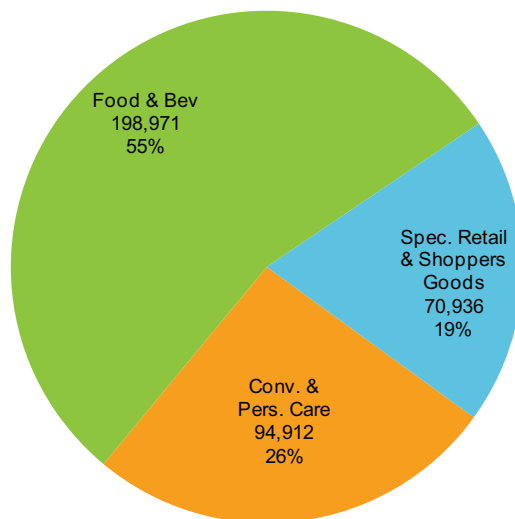
After gathering tenant data and square footage information on the ground, the data was added to property data from the St. Louis County property database and Clayton building footprint files to display the supply visually using GIS mapping software. These maps highlight existing clusters of different retail types that will likely provide a springboard for additional retail development, as well as reveal missed opportunities. The distribution of retail across the CBD is shown in the map in Figure 11. Maps of all the individual planning areas in more detail are attached as an appendix.

**Figure 11: Map of Clayton CBD Retail**



Overall, the inventory documented a total of 159 retail and services businesses comprising 463,300 square feet of space, including the public lobby area of Clayton’s many banks and a number of financial service providers (stock brokerage companies). Banks and financial services comprise over 20% of total square footage, a significant number relative to most central business districts. If this space is excluded, there is 364,500 square feet of retail, dining and other consumer service businesses. The greatest concentration of retail space is in the “North Central” planning area (area surrounding the intersection of North Central and Forsyth), which is particularly well concentrated with restaurants. The total CBD-wide distribution of space is shown in Figure 12. Food and Beverage -- comprised of full service restaurants, limited service cafes and carry-out food service such as coffee shops, bakeries and gelato and other specialty food stores -- represent the greatest amount of total square footage at about 199,000 square feet, or approximately 55 percent of all Clayton CBD retail space (excluding banks and financial services). The remainder of space is split between convenience and personal care and consumer service businesses (95,000 square feet) and specialty retail and shoppers goods stores (71,000 square feet).

**Figure 12: Percent of Clayton CBD Retail Space by Type**



While this amount of total retail space can be considered significant and represents more retail space than in typical urban sub-district, AECOM also noted that Clayton’s retail is not concentrated into one area, nor are the sub-areas (the Central Avenue restaurant district, the Maryland Avenue shops and the retail cluster at Carondelet Circle) are not well linked, nor is there a sense of retail continuity along the Clayton CBD’s blocks that would tie the three areas together.

## Retail Performance

Similar to the office market analysis above, AECOM used data from CoStar to analyze the local market conditions. CoStar’s data contained 21 buildings in the CBD with 641,654 square feet. (A note of caution, this square footage likely contains some office space, and AECOM’s inventory as reported above will give a more concrete sense of actual retail space in the CBD. However, as absorption and rents are tracked by leasing activity by use, these are reliable indicators.) At \$18.34 per square foot, triple net, the direct average rents in the CBD were higher than the submarket, county, and MSA as a whole. Vacancy is also extremely low at 2.6 percent, versus between 7 and 9 for the surrounding areas. Typically, individual projects and markets can have a frictional vacancy of about 7 percent as tenants move in and out of space and as new retail space is leased.

**Table 9: Retail Market Existing Conditions, 3Q 2009**

Submarket / County	Summary Data - 3Q					
	Number of Buildings	Total RBA /1	Share of MSA	Vacancy Rate /2	Total Vacancy Incl. Sublet	Direct Average Rate
Study Area	21	641,654	0.5%	2.6%	2.6%	\$18.34/nnn
Mid County Submarket	654	14,098,259	10.1%	7.0%	7.3%	\$17.49/nnn
St. Louis County	2,917	68,588,031	49.2%	8.7%	8.9%	\$13.65/nnn
St. Louis MSA	7,351	139,494,733	100.0%	8.8%	9.1%	\$12.89/nnn

1/ Rentable Building Area

2/ Does not include Sublet Vacancy

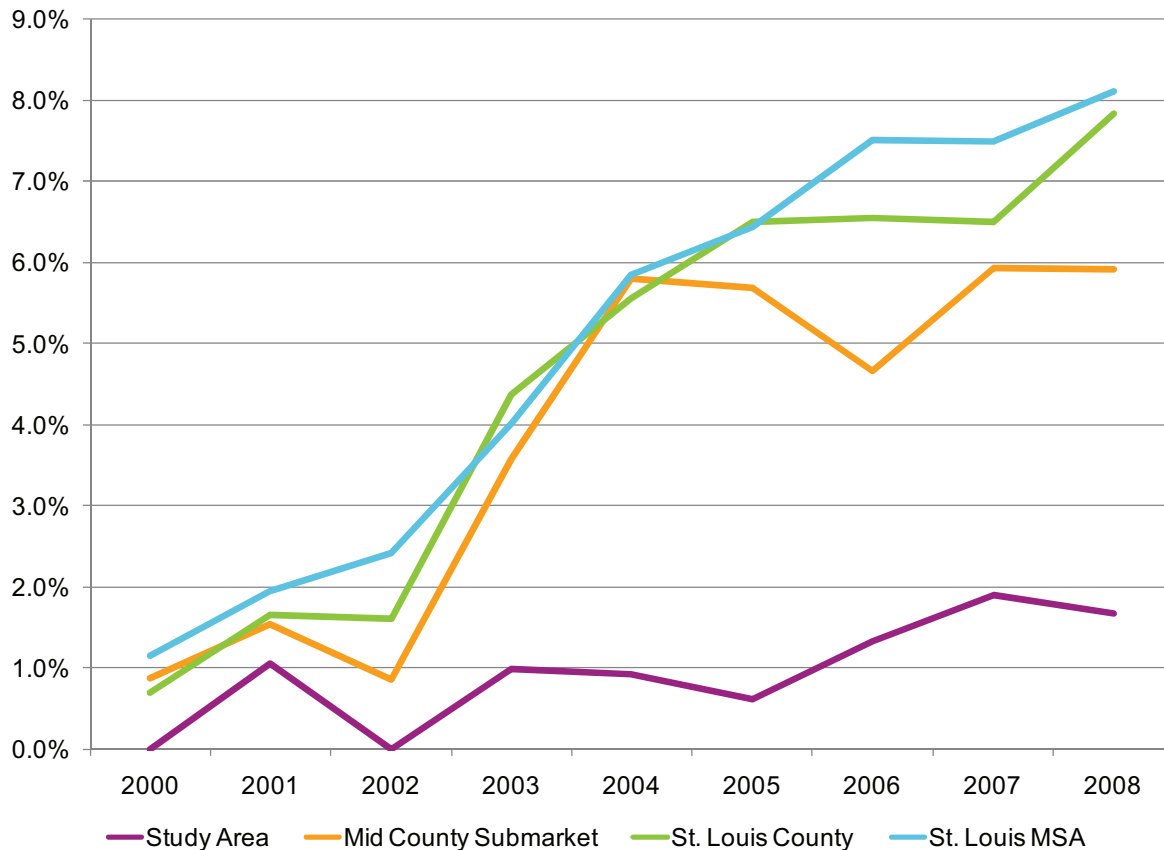
3/ \$0 in an area typically reveals no data, probably from a lack of transactions in that particular quarter/year

Source: CoStar Property; AECOM, December 2009

The data from CoStar shows that the Clayton CBD has had a significantly lower vacancy rate than its submarket (the “Mid County” submarket), St. Louis County, and the MSA as a whole. In all of these areas, vacancy rates climbed from 2000 to 2008, as illustrated in Figure 13



**Figure 13: Retail Vacancy Rate, 2000-2008**



## Retail Demand Analysis

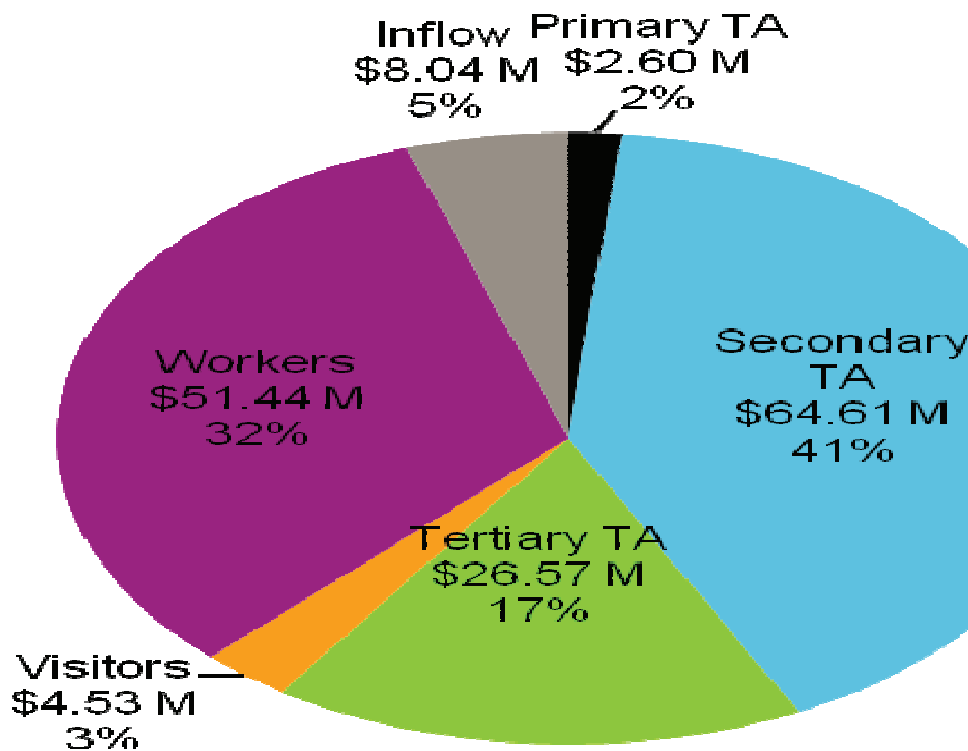
Retail location is mostly driven by good access and visibility to readily accessible market segments, such as residents/households, employees, and tourists and visitors. Retailers also tend to concentrate near other retailers to enhance their visibility and access to potential customers. Retail is directly supported by increases in overall area income and spending, which can be influenced either by household growth or by increases in household income—as these increase, so does overall spending power. Clayton’s position among St. Louis’s most affluent suburbs has attracted many retailers to it and the surrounding area.

AECOM has assessed the potential demand for retail space in the next five years. Retail is a use that changes rapidly to respond to trends and customers’ needs. As a result, projecting further out than five years gives less than reliable results. It is possible, however, to look out at a slightly longer range using the current trajectory as a target, and using this outlook to inform the strategy in the period up to ten years out.

To determine the amount of supportable square footage in the Clayton CBD, AECOM assessed the retail expenditures of likely sources of demand, including trade area residents, area visitors, and daytime employees.

Data sources for spending patterns of these various markets included data service ESRI Business Analyst, to assess trade area households and their spending; the International Council of Shopping Centers' (ICSC) *Office Worker Spending Patterns* survey for daytime employees; the Missouri Department of Tourism and the Travel Industry Association for travelers; and AECOM's experience from past retail studies.

The chart below illustrates the sources of demand for retail in downtown Clayton.



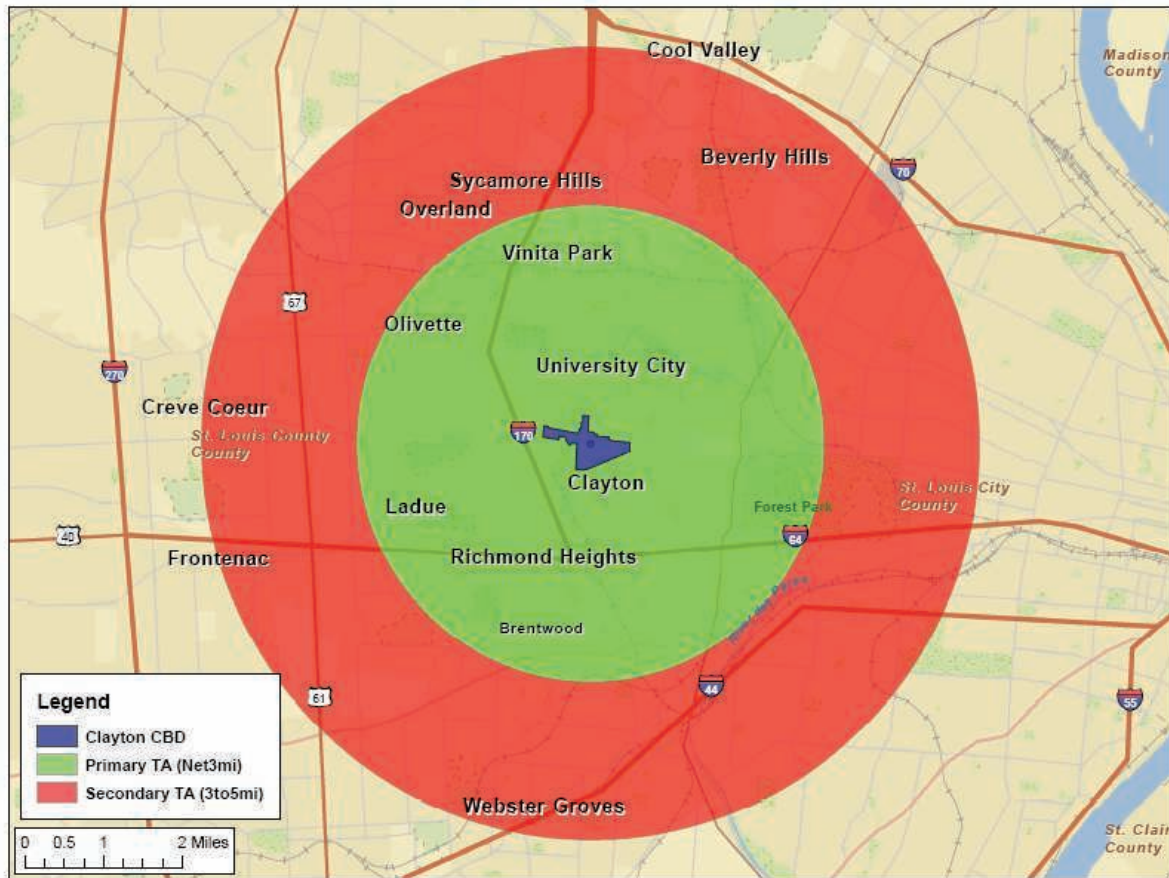
The key findings illustrated on the chart is that office workers represent almost a full third of retail demand; they are in downtown Clayton daily and, if their needs are met, can present a stable base for retail growth. Resident demand will primarily be generated by the Primary (at 2% of the total) and Secondary (at 41% of the total) trade area markets. Visitor spending (including both business and leisure visitor markets) is projected to represent approximately the same amount (at an estimated 3% of the total) of market support as the Clayton resident market. Both the Inflow and Tertiary Trade Area markets will help sustain Clayton's established reputation as a destination dining district.

## **Residential Trade Areas**

The ability of any retailer or shopping center to attract customers relies on a variety of factors including competition, geographic and topographic considerations, demographics and other non-quantifiable characteristics of customer behavior. These affect the retail trade area, or the area from which most of the customers will come to a shopping center or retail area.

AECOM used three residential trade areas for this analysis. The first is the Clayton CBD (shown in dark blue), using the defined Master Plan study area boundary. The primary trade area is shown in green and is a ring that reaches up to three miles from the center of the CBD. While the geometry of the three mile ring is a circle, AECOM notes that the demographic characteristics and potential spending power of the resident market vary significantly within the 3 mile radius. The secondary trade area used is a two-mile wide ring located outside the 0-3 mile primary trade area (net of the CBD Master Plan study area households), and is shown in red as a 3-5 mile ring. Due to proximity to Clayton's residents and the increase in competitive retail within the secondary trade area, AECOM suggests that most of the residential retail expenditures in Clayton will come from the primary trade areas, with sales from the secondary area most likely drawn by Clayton's restaurant cluster.

Figure 14: Clayton CBD Retail Trade Areas



In the Clayton CBD, ESRI data indicates that there were 1,636 people in 332 households in 2009, representing a slight increase from 2000. The per capita income was just under \$40,000, significantly higher than the U.S. per capita income of \$28,600. The secondary and tertiary trade areas have on average contracted slightly each year. Because there are areas of both lower and higher income households in these trade areas, the per capita and median household incomes are lower than in the CBD. As a result of this, the average household expenditure on the included expenditure categories in the CBD is double that of the average expenditure in the tertiary trade area.

	Primary	Secondary	Tertiary	Total
<b>Population</b>				
2000	1,629	114,559	201,974	318,162
2009	1,636	111,199	197,127	309,962
2014	1,636	109,428	194,974	306,038
Annual Growth Rate 2000-2009	0.1%	-0.6%	-0.5%	-0.5%
Projected Annual Growth Rate 2009-2014	0.0%	-0.3%	-0.2%	-0.3%
<b>Households</b>				
2000	324	50,491	87,291	138,106
2009	332	49,655	85,952	135,939
2014	332	49,095	85,401	134,828
Annual Growth Rate 2000-2009	0.5%	-0.3%	-0.3%	-0.3%
Projected Annual Growth Rate 2009-2014	0.0%	-0.2%	-0.1%	-0.2%
<b>2009 Income Profile</b>				
Per Capita Income	\$39,967	\$36,859	\$28,884	n/a
Median Household	\$85,981	\$54,737	\$47,196	n/a
% of Total Households Earning \$75,000 or above	43.10%	21.50%	15.10%	n/a
2009 Average Household Retail Expenditure /1	\$ 31,513	\$ 18,983	\$ 15,344	n/a

1/ Includes the following retail categories: Food and Non Alcoholic Beverages at home, Prescription Drugs, Nonprescription Drugs, Personal Care Products, Alcoholic Beverages, Apparel, Computer Hardware/Software, Audio and Video Equipment, Household Textiles, Furniture, Floor Coverings, Major Appliances, Housewares, Small Appliances, Housekeeping Supplies, Pets, Toys and Games, Sports/Recreation/Exercise Equipment, Photo Equipment and Supplies, Reading, and Food Away From Home. Avg. U.S. Household Expenditures in these categories equal approx. \$17,000/year.

Source: ESRI, 2009; AECOM, January 2010

#### Table 10: Retail Trade Area Demographics

AECOM distributed expenditures by retail category, according to ESRI data, into retail store types using ratios derived from the U.S. Economic Census produced by the Census Bureau. The captured daytime expenditures of employees living within the residential trade area (shown in the section below) were netted out of the trade area expenditures, as shown in Table 11.

**Table 11: Net Trade Area Expenditures**

	2014 Net Resident Spending		
	Primary	Secondary	Tertiary
Food & beverage stores	\$ 2,918,905	\$ 260,483,259	\$ 369,376,126
Health & personal care stores	\$ 471,568	\$ 40,942,756	\$ 60,050,264
<b>Convenience Stores</b>	<b>\$ 3,390,473</b>	<b>\$ 301,426,015</b>	<b>\$ 429,426,390</b>
General merchandise stores	\$ 2,392,728	\$ 213,208,805	\$ 299,564,787
Clothing & clothing accessories stores	\$ 1,144,564	\$ 103,110,410	\$ 142,448,726
Sporting goods, hobby, book, & music stores	\$ 310,940	\$ 27,668,066	\$ 38,661,854
Furniture & home furnishings stores	\$ 385,161	\$ 34,404,681	\$ 46,958,636
Electronics & appliance stores	\$ 494,869	\$ 44,454,384	\$ 62,195,507
Miscellaneous store retailers	\$ 207,861	\$ 18,588,355	\$ 25,999,890
<b>Shoppers Goods Stores</b>	<b>\$ 4,936,121</b>	<b>\$ 441,434,701</b>	<b>\$ 615,829,399</b>
Full Service	\$ 1,140,123	\$ 105,614,869	\$ 278,584,169
Limited Service	\$ 826,801	\$ 77,565,298	\$ 109,443,246
	<b>\$ 1,966,924</b>	<b>\$ 183,180,167</b>	<b>\$ 388,027,415</b>
<b>Total</b>	<b>\$ 10,293,519</b>	<b>\$ 926,040,882</b>	<b>\$ 1,433,283,205</b>

Source: ESRI; AECOM, January 2010

AECOM then applied a capture rate—or the share of total resident expenditures that could potentially be captured as CBD store sales—to each of the trade areas. AECOM estimated capture rates for each store type based on the CBD’s competitive strengths and the proximity to competitive supply. Applying the capture rates to the total expenditures by store type from all available markets results in the supportable sales for the site, as shown in Table 12.

**Table 12: Captured Resident Trade Area Expenditures**

	Capture Rates			
	Primary	Secondary	Tertiary	
Food & beverage stores	50%	10%	1%	
Health & personal care stores	50%	5%	1%	
General merchandise stores	5%	5%	1%	
Clothing & clothing accessories stores	10%	5%	1%	
Sporting goods, hobby, book, & music stores	10%	5%	1%	
Furniture & home furnishings stores	10%	5%	1%	
Electronics & appliance stores	10%	5%	1%	
Miscellaneous store retailers	10%	5%	1%	
Full Service	25%	10%	5%	
Limited Service	30%	5%	2%	
Captured Spending				
	Primary	Secondary	Tertiary	Total--All Residential Markets
Food & beverage stores	\$1,459,452	\$26,048,326	\$3,693,761	\$31,201,539
Health & personal care stores	\$235,784	\$2,047,138	\$600,503	\$2,883,424
<b>Convenience Stores</b>	<b>\$1,695,236</b>	<b>\$28,095,464</b>	<b>\$4,294,264</b>	<b>\$34,084,964</b>
General merchandise stores	\$119,636	\$10,660,440	\$2,995,648	\$13,775,725
Clothing & clothing accessories stores	\$114,456	\$5,155,520	\$1,424,487	\$6,694,464
Sporting goods, hobby, book, & music stores	\$31,094	\$1,383,403	\$386,619	\$1,801,116
Furniture & home furnishings stores	\$38,516	\$1,720,234	\$469,586	\$2,228,336
Electronics & appliance stores	\$49,487	\$2,222,719	\$621,955	\$2,894,161
Miscellaneous store retailers	\$20,786	\$929,418	\$259,999	\$1,210,203
<b>Shoppers Goods Stores</b>	<b>\$373,976</b>	<b>\$22,071,735</b>	<b>\$6,158,294</b>	<b>\$28,604,005</b>
Full Service	\$285,031	\$10,561,487	\$13,929,208	\$24,775,726
Limited Service	\$248,040	\$3,878,265	\$2,188,865	\$6,315,170
<b>Restaurants</b>	<b>\$533,071</b>	<b>\$14,439,752</b>	<b>\$16,118,073</b>	<b>\$31,090,896</b>
<b>Total Potential Sales</b>	<b>\$2,602,283</b>	<b>\$64,606,951</b>	<b>\$26,570,631</b>	<b>\$93,779,865</b>

Source: ESRI Business Analyst; AECOM, January 2010

To this, AECOM added expenditures by daytime employees and visitors. These spending estimates are explained below.

## Employees

AECOM estimated area employees using the U.S. Census's Longitudinal Employer-Household Dynamics data. According to this data, in a one-mile radius of the site, there were approximately 20,000 employees as of 2008. According to the City's statistics, there are 35,000 employees, and as such, AECOM has used the higher number for retail projections. AECOM has used the Census data

for share of employees living in each trade area. This data indicate that 0.3 percent of CBD employees live in the CBD, 12 percent live in the Secondary Trade Area, and 11.2 percent live in the Tertiary Trade Area. These employees' daytime expenditures will be removed from the trade area spending.

To estimate what these workers spend, AECOM used data collected by the International Council of Shopping Centers (ICSC). The ICSC conducted a study in 2003 to gauge what typical office workers spend annually during the working day. AECOM adjusted these for inflation to 2009 dollars and used the amount the survey found as being spent "closer to work." Additionally, an important finding of the ICSC's study was that though workers are often more likely to shop closer to home than work, "superior retail opportunities can shift this balance—in markets with strong retail, nearly 40 percent of non-grocery shopping trips are made closer to work, versus only 24 percent among those working in areas with weaker retail opportunities."<sup>1</sup> So, in other words, if high quality retail choices are made available, more of the area office workers' spending could be captured within the Clayton CBD.

ERA distributed the ICSC survey spending categories into the retail store types being examined. These estimates are based on general observations regarding worker spending patterns. The total estimated employee spending as well as what could be captured in the CBD is shown in Table 13.

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<sup>1</sup> International Council of Shopping Centers, *Office Worker Retail Spending Patterns*, 2004, p. 3.



**Table 13: Estimated CBD Employee Retail Spending**

	Per Employee Spending-- Total	Per Employee Spending Closer to Work	2009 Downtown Clayton Employee Spending	2014 Downtown Clayton Employee Spending	Capture Rate	2014 Captured Spending
<b>Convenience Retail</b>						
Food & beverage stores	\$1,312	\$446	\$15,615,935	\$16,017,488	40%	\$6,406,995
Health & personal care stores	\$1,312	\$446	\$15,615,935	\$16,017,488	40%	\$6,406,995
	<b>\$2,625</b>	<b>\$892</b>	<b>\$31,231,871</b>	<b>\$32,034,976</b>		<b>\$12,813,990</b>
<b>Shoppers Goods Retail</b>						
General merchandise stores	\$1,574	\$535	\$18,736,343	\$19,218,135	5%	\$960,907
Clothing & clothing accessories stores	\$754	\$256	\$8,973,358	\$9,204,102	10%	\$920,410
Sporting goods, hobby, book, & music stores	\$205	\$70	\$2,434,828	\$2,497,438	5%	\$124,872
Furniture & home furnishings stores	\$253	\$86	\$3,016,014	\$3,093,569	5%	\$154,678
Electronics & appliance stores	\$326	\$111	\$3,875,087	\$3,974,733	5%	\$198,737
Miscellaneous store retailers	\$137	\$47	\$1,627,662	\$1,669,517	5%	\$83,476
	<b>\$3,249</b>	<b>\$1,105</b>	<b>\$38,663,294</b>	<b>\$39,657,493</b>		<b>\$2,443,080</b>
<b>Restaurants</b>						
Full-Service	\$1,356	\$930	\$32,550,612	\$33,387,628	50%	\$16,693,814
Limited-Service	\$977	\$835	\$29,238,609	\$29,990,459	65%	\$19,493,799
	<b>\$2,333</b>	<b>\$1,765</b>	<b>\$61,789,221</b>	<b>\$63,378,087</b>		<b>\$36,187,612</b>

1/ City of Clayton CBD Employment Estimate. Census Longitudnal Employment Data suggests approximately 22,000.

2/ Census Longitudnal Employment Patterns, "On the Map," 2008

3/ Based on International Council of Shopping Centers Office Worker Spending Patterns, 2007, adjusted for inflation to 2009 dollars

Source: As Noted; AECOM, January 2010

## Visitors

Because more specific data was not available, AECOM has approached finding the most likely visitor base for retail in the CBD by examining hotel rooms within the CBD, which according to Smith Travel Research total 841. Based on our experience in other markets and using average room occupancy levels in 2009, AECOM has applied nationwide average business and leisure visitor spending patterns and typical occupancy numbers to estimate the total number of hotel-based visitors as well as their likely spending potentials.

With an average occupancy of 60 percent, an average party size of 1.5 persons, and an average length of stay of 2.5 days, the number of visitors staying at these hotels is projected to be approximately 111,000 annually. To this, AECOM has added an estimated one guest per resident presumed to be visiting with friends and family (known in the tourism industry as VFR's for "Visiting Friends and Relatives"). In total, this equals an estimated 126,000 (rounded) visitors to the Clayton CBD.

**Table 14: Estimated CBD Overnight Visitation**

Hotel Rooms /1	841
Occupancy /2	60%
Days Per Year	365
Persons Per Party /2	1.5
Avg Length of Trip/ 2	2.5
Hotel Overnight Visitors	111,000
Visiting Friends and Family /3	15,246
<b>Total Visitors</b>	<b>126,246</b>

1/ Smith Travel Research

2/ AECOM used best guess estimates based on industry experience of competitive supply and visitation in similar areas.

3/ Estimating 1 visitor per resident of Clayton in 2014

Source: Missouri Department of Tourism; as noted; AECOM, January 2010

AECOM used data from a study for the Missouri Department of Tourism to estimate visitor expenditures. Using the ratio of non-lodging expenditures to lodging expenditures suggested by this study and applying to an estimated average daily rate of \$175 to estimate non-lodging spending. These were distributed among retail store types using reasonable estimates. Then, a capture rate was applied to estimate the percentage of total expenditures that could represent sales within the CBD. These are shown in Table 15 on the following page.

**Table 15: Estimated CBD Visitor Spending**

		Clayton Share of CBD, based on an est.		
		Non Lodging	ADR	
Per Night Hotel Expenditures (ADR) /1	\$175			
Expenditures Per Trip /2	\$856			
Expenditures Per Person Per Day	\$81			
<b>Expenditures by Category /2</b>	<b>Share</b>	<b>\$ Per Day</b>	<b>Share of CBD, based on an est.</b>	<b>ADR</b>
Lodging	24%	\$19	0%	\$175
Meals/Food/Groceries	19%	\$15	24%	\$56
Entertainment	11%	\$9	14%	\$32
Shopping	20%	\$16	26%	\$60
Transportation	14%	\$12	19%	\$43
Attractions	7%	\$6	10%	\$22
Other	5%	\$4	7%	\$16
<b>Total</b>	<b>100%</b>	<b>\$81</b>		<b>\$404</b>
		Potential CBD Capture Rate		
<b>Expenditures by Store Type</b>	<b>Per Visitor</b>	<b>Total</b>	<b>Potential CBD Capture Rate</b>	<b>Potential CBD Sales</b>
<b>Convenience</b>				
Food & beverage stores /3	\$3	\$352,590	40.0%	\$141,036
Health & personal care stores /3	\$15	\$1,933,702	40.0%	\$773,481
	<b>\$18</b>	<b>\$2,286,292</b>		<b>\$914,517</b>
<b>Other Retail</b>				
General merchandise stores /3	\$8	\$966,851	5.0%	\$48,343
Clothing & clothing accessories stores /3	\$11	\$1,450,277	10.0%	\$145,028
Sporting goods, hobby, book, & music stores	\$8	\$966,851	5.0%	\$48,343
Furniture & home furnishings stores /3	\$8	\$966,851	5.0%	\$48,343
Electronics & appliance stores /3	\$8	\$966,851	5.0%	\$48,343
Miscellaneous store retailers /3	\$19	\$2,417,128	10.0%	\$241,713
	<b>\$61</b>	<b>\$7,734,808</b>		<b>\$580,111</b>
<b>Eating and Drinking</b>				
Full-Service /3	\$41	\$5,233,414	30.0%	\$1,570,024
Limited-Service /3	\$39	\$4,880,824	30.0%	\$1,464,247
	<b>\$80</b>	<b>\$10,114,238</b>		<b>\$3,034,271</b>
<b>Total</b>	<b>\$159</b>	<b>\$20,135,338</b>		<b>\$4,528,899</b>

1/ AECOM used best guess estimates based on industry experience of competitive supply and visitation in similar areas.

2/ Source: Strategic Marketing & Research, Inc., CY08 Ad & PR Effectiveness Study

3/ Food & beverage stores estimated to be 5% of meals expenditures; health & personal care stores estimated to be 20% of shopping expenditures; general merchandise stores estimated to be 10% of shopping expenditures; clothing stores estimated to be 15% of shopping expenditures; sporting goods stores, etc., furniture stores, electronics stores, each estimated to be 10% of shopping expenditures; miscellaneous stores estimated to be 25% of shopping expenditures; full service restaurants estimated to be 25% of entertainment and 50% of meals expenditures; and limited service restaurants estimated to be 25% of entertainment and 45% of meal expenditures.

Source: Missouri Department of Tourism; as noted; AECOM, January 2010

## Supportable Retail Demand

To gauge the total supportable retail space in Clayton's CBD, AECOM added the potential sales from each of the markets. The supportable sales were then augmented by an inflow factor to account for sales from residents outside of the defined trade areas, for pass-through traffic, and for day visitors. This inflow number would account for those shoppers who might dine in Clayton after a trip to the Galleria, or who might travel from outside the 'normal' trade radius because they want to visit a one-of-a-kind business in downtown Clayton.

**Table 16: Total Captured Spending from All Markets, Plus Inflow, 2014**

	Residential Trade Areas	Visitors	Employees	Total Captured Sales From All Markets	Inflow Rate	Total Spending
Food & beverage stores	\$31,201,539	\$141,036	\$6,406,995	\$37,749,571	1%	\$38,127,000
Health & personal care stores	\$2,883,424	\$773,481	\$6,406,995	\$10,063,901	1%	\$10,165,000
<b>Convenience Stores</b>	<b>\$34,084,964</b>	<b>\$914,517</b>	<b>\$12,813,990</b>	<b>\$47,813,471</b>		<b>\$48,292,000</b>
General merchandise stores	\$13,775,725	\$48,343	\$960,907	\$14,784,974	1%	\$14,933,000
Clothing & clothing accessories stores	\$6,694,464	\$145,028	\$920,410	\$7,759,902	3%	\$7,954,000
Sporting goods, hobby, book, & music stores	\$1,801,116	\$48,343	\$124,872	\$1,974,330	1%	\$1,994,000
Furniture & home furnishings stores	\$2,228,336	\$48,343	\$154,678	\$2,431,357	5%	\$2,553,000
Electronics & appliance stores	\$2,894,161	\$48,343	\$198,737	\$3,141,240	1%	\$3,173,000
Miscellaneous store retailers	\$1,210,203	\$241,713	\$83,476	\$1,535,391	1%	\$1,551,000
<b>Shoppers Goods Stores</b>	<b>\$28,604,005</b>	<b>\$580,111</b>	<b>\$2,443,080</b>	<b>\$31,627,195</b>		<b>\$32,158,000</b>
Full Service	\$24,775,726	\$1,570,024	\$16,693,814	\$43,039,564	10%	\$47,344,000
Limited Service	\$6,315,170	\$1,464,247	\$19,493,799	\$27,273,216	10%	\$30,001,000
	<b>\$31,090,896</b>	<b>\$3,034,271</b>	<b>\$36,187,612</b>	<b>\$70,312,780</b>		<b>\$77,345,000</b>
<b>Total</b>	<b>\$93,779,865</b>	<b>\$4,528,899</b>	<b>\$51,444,682</b>	<b>\$149,753,446</b>		<b>\$157,795,000</b>

Source: AECOM, January 2010

To arrive at the supportable square footage from the available sales, AECOM applied a range of average productivity rates, based upon published sources such as ULI's *Dollars and Cents of Shopping Centers*. These were tempered by knowledge of area retail rents and industry experience. Applying these productivity rates resulted in a total demand for 2014 of between 346,300 and 410,300 square feet of retail space (see Table 17).

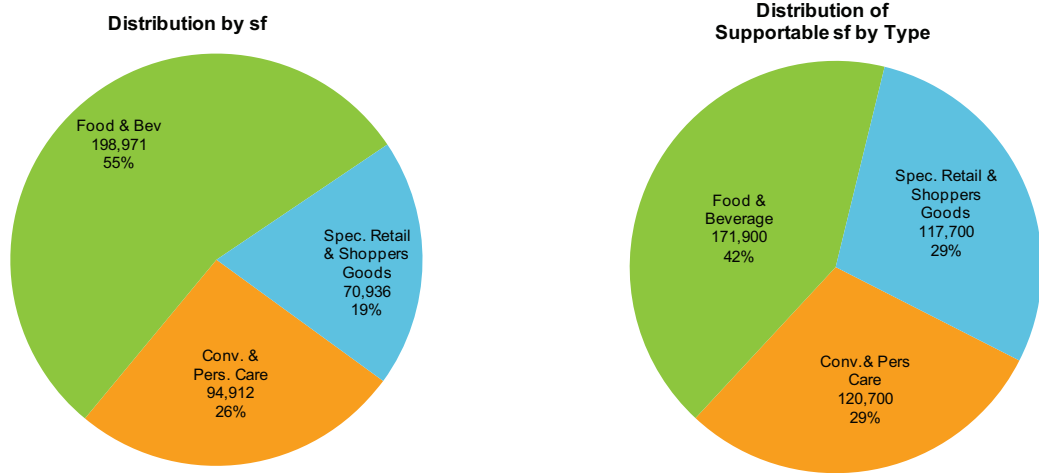
**Table 17: Estimated Supportable Square Feet, 2014**

	2014 Sales	Productivity Rate		Supportable SF	
		Low	High		
Food & beverage stores	\$38,127,000	\$400	\$450	95,300	84,700
Health & personal care stores	\$10,165,000	\$400	\$600	25,400	16,900
<b>Convenience Stores</b>	<b>\$48,292,000</b>			<b>120,700</b>	<b>101,600</b>
General merchandise stores	\$14,933,000	\$250	\$300	59,700	49,800
Clothing & clothing accessories stores	\$7,954,000	\$300	\$350	26,500	22,700
Sporting goods, hobby, book, & music stores	\$1,994,000	\$250	\$300	8,000	6,600
Furniture & home furnishings stores	\$2,553,000	\$250	\$300	10,200	8,500
Electronics & appliance stores	\$3,173,000	\$450	\$550	7,100	5,800
Miscellaneous store retailers	\$1,551,000	\$250	\$300	6,200	5,200
<b>Shoppers Goods Stores</b>	<b>\$32,158,000</b>			<b>117,700</b>	<b>98,600</b>
Full Service	\$47,344,000	\$450	\$550	105,200	86,100
Limited Service	\$30,001,000	\$450	\$500	66,700	60,000
	<b>\$77,345,000</b>			<b>171,900</b>	<b>146,100</b>
<b>Total</b>	<b>\$157,795,000</b>			<b>410,300</b>	<b>346,300</b>
<b>Range of Supportable SF</b>		<b>346,300 - 410,300 square feet</b>			

Source: AECOM, January 2010

Because AECOM's inventory of existing space revealed 364,500 square feet of existing space (excluding financial services), this suggests a selected amount of incremental retail space and additional demand. However, it is possible that much of the existing space is not achieving the productivity levels used in the analysis, which could mean there is a greater net demand for retail. Additionally, comparing demand for retail space by type against the amount of existing retail space by category reveals additional demand for convenience and personal care stores and other retail stores, as shown in Figure 15. A strict reading of the tables might suggest that Clayton has "too much" restaurant space; however, AECOM suggests that the additional restaurant space beyond the "natural" market confirms that the restaurants in Clayton's CBD are a successful draw from the larger market, both in the distance traveled to reach Clayton as well as in the frequency of visitation for dining. The city doesn't have too much dining, but rather, not enough specialty and consumer service retail to balance the demand created by the dining district.

**Figure 15: Comparison of Existing Clayton CBD Retail Space Distribution by Type With Projected Supportable**



**Space**

## Appendix

### Data Sources

AECOM used a wide variety of data sources for this analysis. In addition to data provided by the Client, AECOM used data from:

- **ESRI** is the worldwide leader in geographical information system (GIS) mapping and data linkage. ERA used ESRI ARC/GIS database of US Census-based demographic data. ESRI also creates annual estimates and five-year projections based on the latest available information from federal, state and local government, and academic and private sources. They take into account major developments—such as base closures, major new employers, and other nationwide and regional trends. ESRI Tapestry segmentation data divides US households into 65 segments based on demographic variables such as age, income, home value, occupation, household type, education, and other consumer behavior characteristics. Using the demographic data, we segmented the market groups by income, tenure, unit preference, locational preference, and those with housing preferences for the traditional neighborhood development product types.;
- **Costar** is a national source for commercial real estate information such as comprehensive property details, including building location, class, zoning, available space, asking rents and sales prices, ownership type, vacancy rate, maximum contiguous space, typical floor size, year built, elevators, core factor, parking and contact information. CoStar also offers property analytics, including vacancy and rental rate trends, sales and loan information, assessment data, and other information. This information is collected on the ground and by information given to CoStar by building owners and managers;
- **Woods & Poole Economics, Inc.** is an independent firm that specializes in long-term county economic and demographic projections. Woods & Poole's database for every county in the U.S. contains projections through 2030 for more than 900 variables. Each year Woods & Poole updates the projections with new historical data. Woods & Poole has been making county projections since 1983;
- **Smith Travel Research (STR)**, is the leading database of hotel market and performance data. Each month STR collects performance data on over 24,500 hotels representing more than 2.9 million rooms. This data comes from chain headquarters, management companies, owners, and directly from independent hotels. The data are audited for accuracy and checked

for adherence to the STR reporting guidelines. STR also collects daily performance data from over 20,000 hotels each week.

- **Interviews.** AECOM also conducted interviews with developers, managers, real estate brokers and others active in Clayton in order to confirm data collected by secondary sources and gain supplemental market perspective.



## Data Tables



**Appendix Table 1: Demographic Overview**  
**Clayton Downtown Retail Analysis**

	Clayton					St. Louis County				
	2000	2009	2014	00-'08 CAGR	08-'13 CAGR	2000	2009	2014	00-'08 CAGR	08-'13 CAGR
<b>Population</b>	12,825	15,453	15,246	2.09%	-0.27%	1,016,315	1,002,250	991,496	-0.15%	-0.22%
<b>Households</b>	5,370	5,220	5,141	-0.31%	-0.30%	404,312	406,446	404,486	0.06%	-0.10%
<b>Avg. HH Size</b>	2.09	2.06	2.05	-0.16%	-0.10%	2.47	2.42	2.40	-0.23%	-0.17%
<b>Race</b>										
White	84.9%	76.1%	72.8%	-1.21%	-0.88%	76.8%	73.4%	71.4%	-0.50%	-0.55%
Black	7.8%	9.8%	10.8%	2.57%	1.96%	19.0%	21.0%	22.1%	1.12%	1.03%
American Indian, Eskimo	0.1%	0.1%	0.1%	0.00%	0.00%	0.2%	0.2%	0.2%	0.00%	0.00%
Asian, Pacific Islander	5.7%	8.0%	9.7%	3.84%	3.93%	2.2%	3.4%	4.2%	4.96%	4.32%
Other	1.5%	6.1%	6.4%	16.87%	0.96%	1.8%	2.0%	2.2%	1.18%	1.92%
Hispanic 1/	1.5%	2.6%	3.0%	6.30%	2.90%	1.4%	1.9%	2.2%	3.45%	2.98%
<b>Median HH Income</b>	\$64,308	\$81,255	\$85,471	2.63%	1.02%	\$50,554	\$65,621	\$69,113	2.94%	1.04%
<b>Average HH Income</b>	\$112,812	\$130,346	\$141,513	1.62%	1.66%	\$68,436	\$85,713	\$90,294	2.53%	1.05%
<b>Owner-Occupied HUs</b>	2,961	2,823	2,790	-0.53%	-0.24%	299,591	299,517	297,372	0.00%	-0.14%
<b>Renter-Occupied HUs</b>	2,405	2,401	2,349	-0.02%	-0.44%	104,666	106,970	107,457	0.24%	0.09%
<b>Vacant Housing Units</b>	480	725	809	4.69%	2.21%	19,492	30,126	34,211	4.96%	2.58%
	<b>St. Louis MSA</b>					<b>USA</b>				
	2000	2009	2014	00-'08 CAGR	08-'13 CAGR	2000	2009	2014	00-'08 CAGR	08-'13 CAGR
<b>Population</b>	2,698,687	2,850,518	2,920,927	0.61%	0.49%	278,049,507	306,109,789	320,322,004	1.07%	0.91%
<b>Households</b>	1,048,279	1,120,241	1,152,348	0.74%	0.57%	104,281,646	115,219,232	120,757,470	1.11%	0.94%
<b>Avg. HH Size</b>	2.52	2.49	2.49	-0.13%	0.00%	2.59	2.59	2.59	0.00%	0.00%
<b>Race</b>										
White	78.9%	77.2%	76.3%	-0.24%	-0.23%	75.3%	72.2%	70.5%	-0.47%	-0.48%
Black	17.7%	18.5%	18.8%	0.49%	0.32%	12.4%	12.8%	12.9%	0.35%	0.16%
American Indian, Eskimo	0.2%	0.2%	0.3%	0.00%	8.45%	0.8%	0.9%	0.9%	1.32%	0.00%
Asian, Pacific Islander	1.4%	2.0%	2.4%	4.04%	3.71%	3.6%	4.5%	5.0%	2.51%	2.13%
Other	1.7%	2.0%	2.2%	1.82%	1.92%	7.8%	9.7%	10.7%	2.45%	1.98%
Hispanic 1/	1.5%	2.0%	2.3%	3.25%	2.83%	12.5%	15.7%	17.5%	2.56%	2.19%
<b>Median HH Income</b>	\$44,035	\$57,853	\$59,820	3.08%	0.67%	\$42,148	\$54,710	\$56,927	2.94%	0.80%
<b>Average HH Income</b>	\$57,004	\$71,959	\$75,000	2.62%	0.83%	\$56,645	\$71,446	\$74,485	2.61%	0.84%
<b>Owner-Occupied HUs</b>	751,363	803,883	829,541	0.75%	0.63%	69,050,962	76,285,206	80,925,041	1.11%	1.19%
<b>Renter-Occupied HUs</b>	296,919	315,589	323,098	0.68%	0.47%	35,269,811	38,921,024	39,781,333	1.10%	0.44%
<b>Vacant Housing Units</b>	84,996	121,763	129,496	4.07%	1.24%	10,191,601	14,530,515	15,531,069	4.02%	1.34%

1/ Hispanic origin is a subset of other race categories



Appendix Table 2: Population by Age  
Clayton Downtown Retail Analysis

Clayton								St. Louis County							
Age	2000	% of Total	2009	% of Total	2014	% of Total	% Change	2000	% of Total	2009	% of Total	2014	% of Total	% Change	
0-14	2,014	15.7%	1,715	11.1%	1,631	10.7%	-4.9%	211,394	20.8%	191,430	19.1%	188,384	19.0%	-1.6%	
15-24	1,924	15.0%	5,007	32.4%	4,894	32.1%	-2.2%	129,072	12.7%	130,293	13.0%	123,937	12.5%	-4.9%	
25-44	4,142	32.3%	3,601	23.3%	3,522	23.1%	-2.2%	293,715	28.9%	252,567	25.2%	248,865	25.1%	-1.5%	
45-64	2,886	22.5%	3,261	21.1%	3,156	20.7%	-3.2%	238,834	23.5%	278,626	27.8%	270,678	27.3%	-2.9%	
65+	1,834	14.3%	1,885	12.2%	2,043	13.4%	8.4%	142,284	14.0%	147,331	14.7%	159,631	16.1%	8.3%	
<b>TOTAL:</b>	<b>12,825</b>		<b>15,453</b>		<b>15,247</b>		<b>-1.3%</b>	<b>1,016,315</b>		<b>1,002,250</b>		<b>991,496</b>		<b>-1.1%</b>	

St. Louis MSA								USA							
Age	2000	% of Total	2009	% of Total	2014	% of Total	% Change	2000	% of Total	2009	% of Total	2014	% of Total	% Change	
0-14	582,916	21.6%	575,805	20.2%	587,106	20.1%	2.0%	59,502,594	21.4%	61,528,068	20.1%	64,705,045	20.2%	5.2%	
15-24	358,925	13.3%	381,969	13.4%	373,879	12.8%	-2.1%	38,648,881	13.9%	42,855,370	14.0%	43,563,793	13.6%	1.7%	
25-44	806,907	29.9%	752,537	26.4%	762,362	26.1%	1.3%	83,970,951	30.2%	82,649,643	27.0%	84,565,009	26.4%	2.3%	
45-64	596,410	22.1%	766,789	26.9%	776,967	26.6%	1.3%	61,170,892	22.0%	79,588,545	26.0%	82,643,077	25.8%	3.8%	
65+	348,131	12.9%	373,418	13.1%	420,613	14.4%	12.6%	34,478,139	12.4%	39,182,053	12.8%	45,165,403	14.1%	15.3%	
<b>TOTAL:</b>	<b>2,698,687</b>		<b>2,850,518</b>		<b>2,920,927</b>		<b>2.5%</b>	<b>278,049,507</b>		<b>306,109,789</b>		<b>320,322,004</b>		<b>4.6%</b>	

Note: Numbers may not add due to rounding  
Source: ESRI Business Analyst; AECOM, 2009

Appendix Table 2: Population by Age  
Clayton Downtown Retail Analysis

Clayton								St. Louis County							
Age	2000	% of Total	2009	% of Total	2014	% of Total	% Change	2000	% of Total	2009	% of Total	2014	% of Total	% Change	
Age 0 - 4	487	3.8%	448	2.9%	442	2.9%	-1.3%	64,028	6.3%	61,137	6.1%	60,481	6.1%	-1.1%	
Age 5 - 9	693	5.4%	572	3.7%	549	3.6%	-4.0%	72,158	7.1%	64,144	6.4%	62,464	6.3%	-2.6%	
Age 10 - 14	834	6.5%	695	4.5%	640	4.2%	-7.9%	75,207	7.4%	66,149	6.6%	65,439	6.6%	-1.1%	
Age 15 - 19	923	7.2%	2,859	18.5%	2,760	18.1%	-3.5%	71,142	7.0%	69,155	6.9%	63,456	6.4%	-8.2%	
Age 20 - 24	1,000	7.8%	2,148	13.9%	2,135	14.0%	-0.6%	57,930	5.7%	61,137	6.1%	60,481	6.1%	-1.1%	
Age 25 - 34	2,116	16.5%	1,901	12.3%	2,013	13.2%	5.9%	128,056	12.6%	120,270	12.0%	125,920	12.7%	4.7%	
Age 35 - 44	2,026	15.8%	1,700	11.0%	1,509	9.9%	-11.2%	165,659	16.3%	132,297	13.2%	122,946	12.4%	-7.1%	
Age 45 - 54	1,885	14.7%	1,901	12.3%	1,723	11.3%	-9.4%	146,349	14.4%	156,351	15.6%	139,801	14.1%	-10.6%	
Age 55 - 64	1,000	7.8%	1,360	8.8%	1,433	9.4%	5.4%	92,485	9.1%	122,275	12.2%	130,877	13.2%	7.0%	
Age 65 - 74	834	6.5%	804	5.2%	991	6.5%	23.3%	73,175	7.2%	71,160	7.1%	86,260	8.7%	21.2%	
Age 75 - 84	680	5.3%	649	4.2%	625	4.1%	-3.7%	50,816	5.0%	52,117	5.2%	48,583	4.9%	-6.8%	
Age 85+	321	2.5%	433	2.8%	427	2.8%	-1.3%	18,294	1.8%	24,054	2.4%	24,787	2.5%	3.0%	
<b>Total</b>	<b>12,825</b>		<b>15,453</b>		<b>15,247</b>		<b>-1.3%</b>	<b>1,016,315</b>		<b>1,002,250</b>		<b>991,496</b>		<b>-1.1%</b>	

St. Louis MSA								USA							
Age	2000	% of Total	2009	% of Total	2014	% of Total	% Change	2000	% of Total	2009	% of Total	2014	% of Total	% Change	
Age 0 - 4	178,113	6.6%	190,985	6.7%	192,781	6.6%	0.9%	18,907,366	6.8%	20,815,466	6.8%	21,781,896	6.8%	4.6%	
Age 5 - 9	199,703	7.4%	190,985	6.7%	195,702	6.7%	2.5%	20,297,614	7.3%	20,509,356	6.7%	21,461,574	6.7%	4.6%	
Age 10 - 14	205,100	7.6%	193,835	6.8%	198,623	6.8%	2.5%	20,297,614	7.3%	20,203,246	6.6%	21,461,574	6.7%	6.2%	
Age 15 - 19	197,004	7.3%	199,536	7.0%	189,860	6.5%	-4.8%	20,019,565	7.2%	21,733,795	7.1%	21,141,252	6.6%	-2.7%	
Age 20 - 24	161,921	6.0%	182,433	6.4%	184,018	6.3%	0.9%	18,629,317	6.7%	21,121,575	6.9%	22,422,540	7.0%	6.2%	
Age 25 - 34	358,925	13.3%	364,866	12.8%	385,562	13.2%	5.7%	39,483,030	14.2%	40,712,602	13.3%	43,563,793	13.6%	7.0%	
Age 35 - 44	447,982	16.6%	387,670	12.9%	376,800	12.9%	-2.8%	44,487,921	16.0%	41,937,041	13.7%	41,001,217	12.8%	-2.2%	
Age 45 - 54	364,323	13.5%	438,980	15.4%	406,009	13.9%	-7.5%	37,258,634	13.4%	44,692,029	14.6%	43,243,471	13.5%	-3.2%	
Age 55 - 64	232,087	8.6%	327,810	11.5%	370,958	12.7%	13.2%	23,912,258	8.6%	34,896,516	11.4%	39,399,606	12.3%	12.9%	
Age 65 - 74	183,511	6.8%	188,134	6.6%	233,674	8.0%	24.2%	18,073,218	6.5%	20,203,246	6.6%	25,625,760	8.0%	26.8%	
Age 75 - 84	121,441	4.5%	128,273	4.5%	125,600	4.3%	-2.1%	12,234,178	4.4%	13,162,721	4.3%	13,453,524	4.2%	2.2%	
Age 85+	43,179	1.6%	57,010	2.0%	61,339	2.1%	7.6%	4,170,743	1.5%	5,816,086	1.9%	6,086,118	1.9%	4.6%	
<b>Total</b>	<b>2,698,687</b>		<b>2,850,518</b>		<b>2,920,927</b>		<b>2.5%</b>	<b>278,049,507</b>		<b>306,109,789</b>		<b>320,322,004</b>		<b>4.6%</b>	

Note: Numbers may not add due to rounding  
Source: ESRI Business Analyst; AECOM, 2009



**Appendix Table 3: Household Income Characteristics**  
**Clayton Downtown Retail Analysis**

Household Income	Clayton							St. Louis County						
	2000	% of Total	2009	% of Total	2014	% of Total	'08-'13 % Change	2000	% of Total	2009	% of Total	2014	% of Total	'08-'13 % Change
< \$25,000	712	13%	485	9%	458	9%	-5.7%	84,563	21%	56,090	14%	54,201	13%	-3.4%
\$25,000 - \$49,999	1,301	25%	1,279	25%	828	16%	-35.3%	114,908	28%	115,431	28%	83,324	21%	-27.8%
<b>Subtotal: Under \$50,000:</b>	<b>2,013</b>		<b>1,764</b>		<b>1,285</b>		<b>-27.2%</b>	<b>199,471</b>		<b>171,520</b>		<b>137,525</b>		<b>-19.8%</b>
\$50,000 - \$74,999	951	18%	914	18%	828	16%	-9.4%	85,372	21%	85,760	21%	80,088	20%	-6.6%
\$75,000 - \$99,999	441	8%	835	16%	925	18%	10.8%	48,553	12%	70,315	17%	80,897	20%	15.0%
<b>Subtotal: \$50,000-\$99,999:</b>	<b>1,391</b>		<b>1,749</b>		<b>1,753</b>		<b>0.3%</b>	<b>133,925</b>		<b>156,075</b>		<b>160,985</b>		<b>3.1%</b>
\$100,000 - \$149,999	738	14%	694	13%	694	14%	0.0%	42,079	10%	56,090	14%	57,841	14%	3.1%
\$150,000 +	1,168	22%	1,342	26%	1,414	28%	5.4%	28,727	7%	45,522	11%	48,134	12%	5.7%
<b>Subtotal: \$100,000-\$150,000+:</b>	<b>1,907</b>		<b>2,036</b>		<b>2,108</b>		<b>3.5%</b>	<b>70,806</b>		<b>101,612</b>		<b>105,975</b>		<b>4.3%</b>
<b>TOTAL:</b>	<b>5,311</b>		<b>5,220</b>		<b>5,141</b>		<b>-1.5%</b>	<b>404,607</b>		<b>406,446</b>		<b>404,486</b>		<b>-0.5%</b>

Household Income	St. Louis MSA							USA						
	2000	% of Total	2009	% of Total	2014	% of Total	'08-'13 % Change	2000	% of Total	2009	% of Total	2014	% of Total	'08-'13 % Change
< \$25,000	276,989	26%	208,363	19%	202,812	18%	-2.7%	29,945,548	29%	24,080,584	21%	23,668,243	20%	-1.7%
\$25,000 - \$49,999	311,612	30%	332,709	30%	258,124	22%	-22.4%	30,571,587	29%	33,758,905	29%	27,773,959	23%	-17.7%
<b>Subtotal: Under \$50,000:</b>	<b>588,601</b>		<b>541,073</b>		<b>460,936</b>		<b>-14.8%</b>	<b>60,517,136</b>		<b>57,839,489</b>		<b>51,442,202</b>		<b>-11.1%</b>
\$50,000 - \$74,999	220,332	21%	237,489	21%	253,515	22%	6.7%	20,346,278	20%	24,541,456	21%	27,170,177	23%	10.7%
\$75,000 - \$99,999	115,412	11%	189,319	17%	202,812	18%	7.1%	10,642,669	10%	16,245,753	14%	17,630,426	15%	8.5%
<b>Subtotal: \$50,000-\$99,999:</b>	<b>335,744</b>		<b>426,809</b>		<b>456,327</b>		<b>6.9%</b>	<b>30,988,947</b>		<b>40,787,209</b>		<b>44,800,603</b>		<b>9.8%</b>
\$100,000 - \$149,999	80,788	8%	133,308	12%	149,804	13%	12.4%	8,034,171	8%	13,480,518	12%	14,611,518	12%	8.4%
\$150,000 +	43,017	4%	78,416	7%	84,121	7%	7.3%	4,799,635	5%	8,641,358	8%	9,660,507	8%	11.8%
<b>Subtotal: \$100,000-\$150,000+:</b>	<b>123,806</b>		<b>211,724</b>		<b>233,925</b>		<b>10.5%</b>	<b>12,833,806</b>		<b>22,121,876</b>		<b>24,272,025</b>		<b>9.7%</b>
<b>TOTAL:</b>	<b>1,049,200</b>		<b>1,120,233</b>		<b>1,152,340</b>		<b>2.9%</b>	<b>104,339,889</b>		<b>115,218,105</b>		<b>120,756,343</b>		<b>4.8%</b>

Note: Numbers may not add due to rounding

Source: ESRI Business Analyst; AECOM, 2009

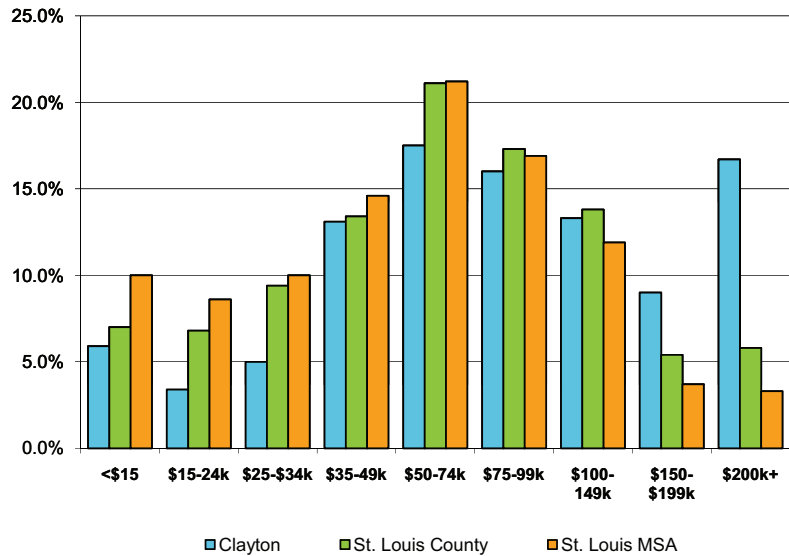


**Appendix Table 4: Detailed 2008 Households by Household Income**  
**Clayton Downtown Retail Analysis**

	Clayton		St. Louis County		St. Louis MSA	
	#	%	#	%	#	%
< \$15,000	308	5.9%	28,451	7.0%	112,023	10.0%
\$15,000 - \$24,999	177	3.4%	27,638	6.8%	96,340	8.6%
\$25,000 - \$34,999	261	5.0%	38,206	9.4%	112,023	10.0%
\$35,000 - \$49,999	684	13.1%	54,464	13.4%	163,554	14.6%
\$50,000 - \$74,999	914	17.5%	85,760	21.1%	237,489	21.2%
\$75,000 - \$99,999	835	16.0%	70,315	17.3%	189,319	16.9%
\$100,000 - \$149,999	694	13.3%	56,090	13.8%	133,308	11.9%
\$150,000 - \$199,999	470	9.0%	21,948	5.4%	41,449	3.7%
\$200,000 +	872	16.7%	23,574	5.8%	36,968	3.3%

Source: ESRI Business Analyst; AECOM, 2009

**Appendix Figure 1: Share of Households by Household Income**  
**Clayton Downtown Retail Analysis**



Source: ESRI; AECOM, 2009.



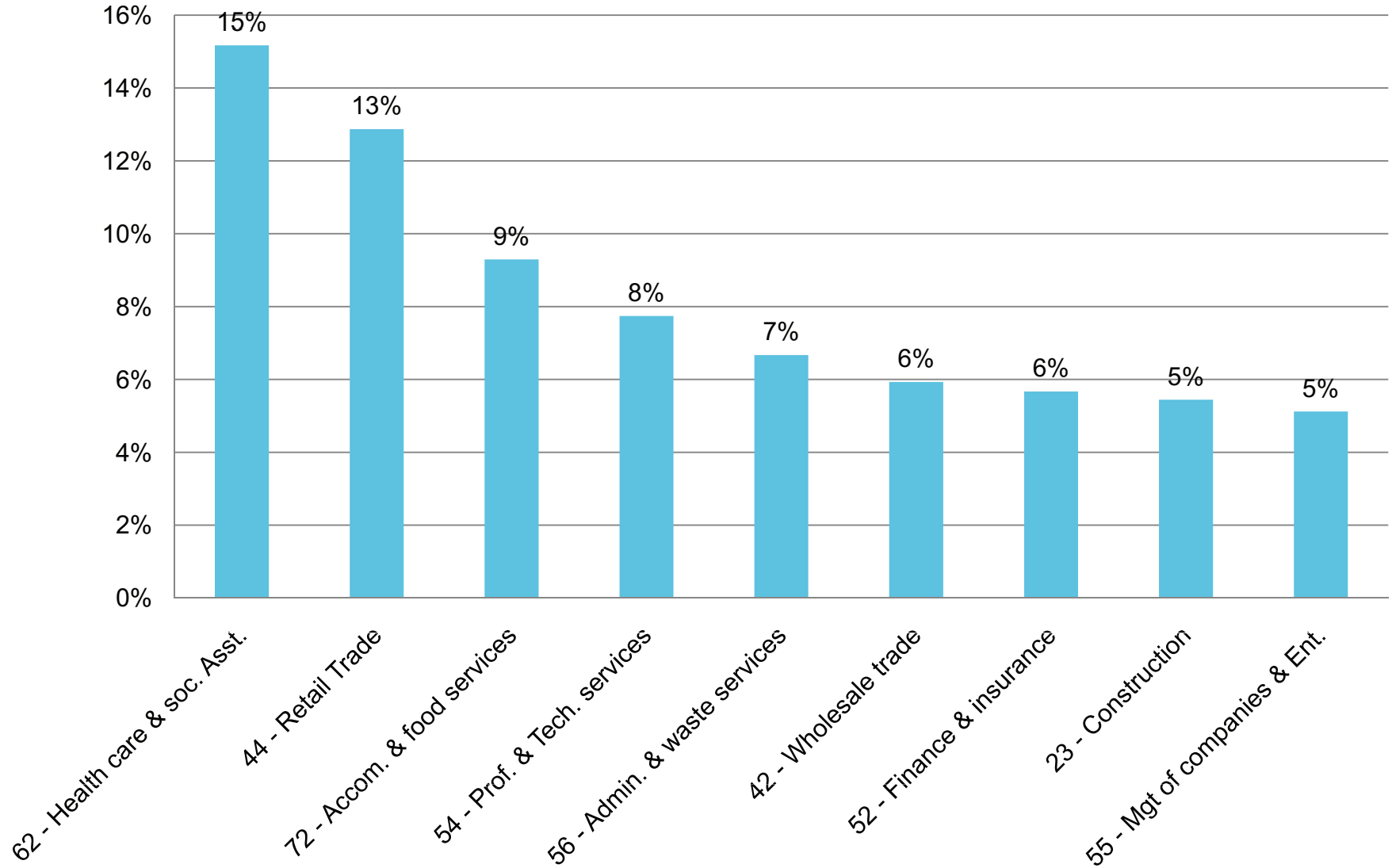
**Appendix Table 5: Employment Projections**  
**Clayton Downtown Retail Analysis**

	St. Louis County					
	2000	2005	2009	2015	2020	2025
Mining and Construction	46,328	44,333	47,153	51,347	54,816	58,266
Manufacturing	87,504	72,279	72,207	71,920	71,532	71,027
Transport, Comm & Public Utilities	51,546	46,341	49,540	54,500	58,771	63,156
Wholesale and Retail Trade	180,973	184,603	191,056	200,515	208,186	215,652
Finance, Insurance & Real Estate	76,317	82,523	87,500	95,028	101,360	107,746
Services	277,287	290,238	312,304	346,104	375,002	404,631
Federal Civilian and Military Governments	10,012	9,632	9,814	10,080	10,292	10,491
State And Local Government	50,040	51,588	53,488	56,354	58,760	61,188
<b>Total</b>	<b>780,007</b>	<b>781,537</b>	<b>823,062</b>	<b>885,848</b>	<b>938,719</b>	<b>992,157</b>

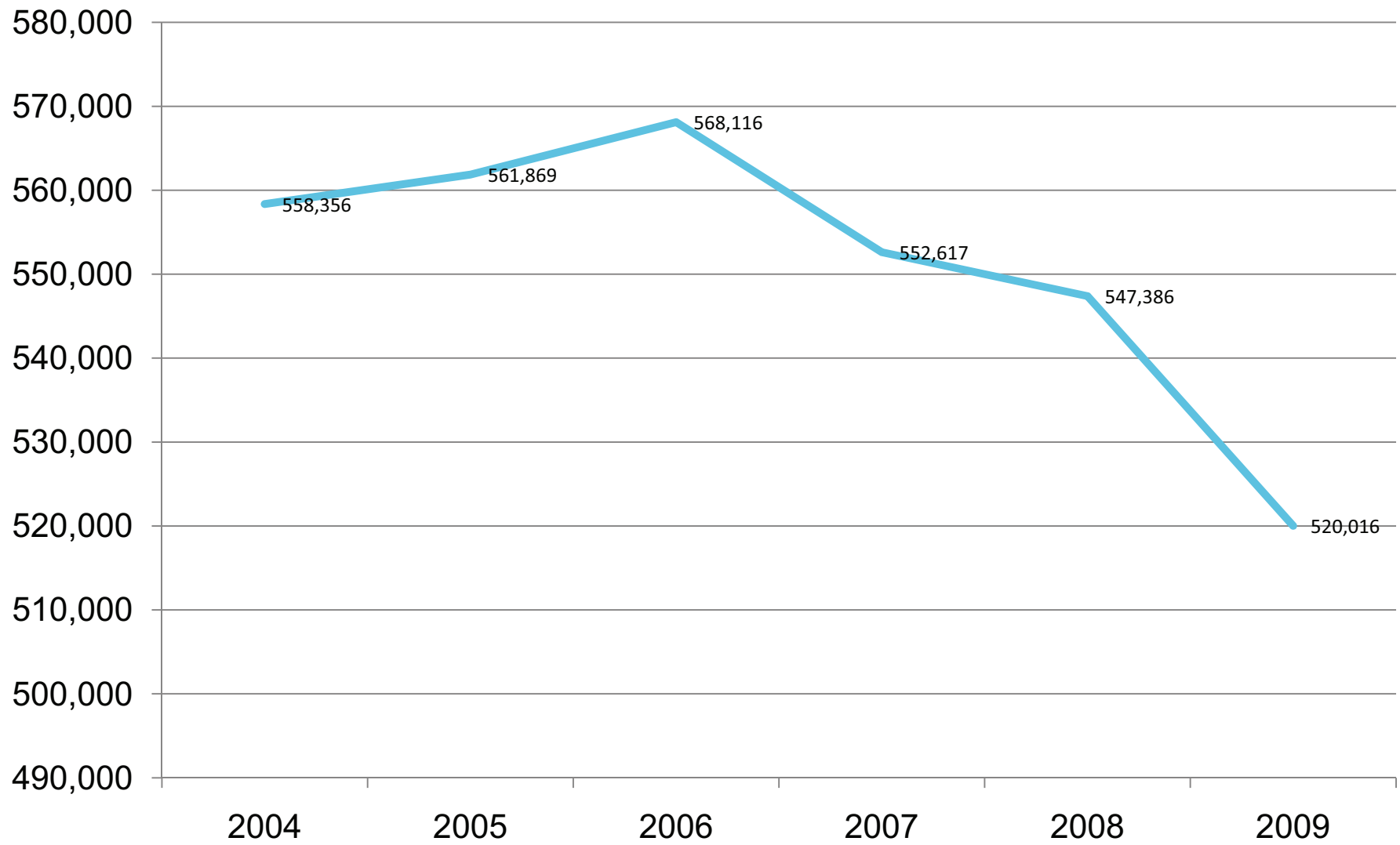
Note: Includes part-time and self employed.

Source: Woods and Poole; AECOM, 2009

**Appendix Figure 2:  
St. Louis County 2-Digit Industry Sectors with Greatest Share, 2009**



**Appendix Figure 3: St. Louis County Total Private Employment**







**Appendix Table 6: St. Louis County Fastest Growing and Shrinking Industries, 2004-2009**  
**Clayton Downtown Retail Analysis**

	2004	2005	2006	2007	2008	2009	CAGR 2004- 2009	2009 Share of Private Emp
<b>Fastest Growing Industries</b>								
<b>2-Digit Level</b>								
22 - Utilities	715	654	747	854	940	1,003	7%	0%
62 - Health care and social assistance	69,685	70,892	75,301	76,150	77,882	78,885	3%	15%
55 - Management of companies and enterprises	25,394	26,543	27,715	27,220	27,555	26,629	1%	5%
54 - Professional and technical services	39,162	41,196	41,680	40,950	41,242	40,256	1%	8%
<b>3-Digit Level</b>								
519 - Other Information Services	16	15	17	171	210	197	65.22%	0%
515 - Broadcasting (except Internet)	600	517	536	1,244	1,268	1,553	20.95%	0%
525 - Funds, Trusts & Other Financial Vehicles	191	204	210	270	302	320	10.87%	0%
115 - Agriculture and forestry support activit	84	78	71	92	140	123	7.93%	0%
221 - Utilities	715	654	747	854	940	1,003	7.00%	0%
454 - Nonstore Retailers	1,830	1,982	2,245	2,411	2,515	2,423	5.77%	0%
523 - Financial Investment & Related Activity	3,726	3,886	4,029	4,231	4,557	4,691	4.71%	1%
622 - Hospitals	23,698	24,090	26,224	26,508	27,221	27,680	3.16%	5%
624 - Social Assistance	7,856	8,092	8,488	8,551	9,034	9,157	3.11%	2%
623 - Nursing and Residential Care Facilities	12,657	12,368	13,117	13,214	13,862	14,200	2.33%	3%
517 - Telecommunications	7,113	7,272	8,220	8,088	7,317	7,912	2.15%	2%

	2004	2005	2006	2007	2008	2009	CAGR 2004- 2009	2009 Share of Total Private Employment
<b>2-Digit Industries Losing Employment</b>								
61 - Educational services	19,540	20,452	21,236	12,250	12,568	12,514	-8.53%	2%
23 - Construction	35,360	35,101	35,893	36,217	34,932	28,303	-4.35%	5%
48 - Transportation and Warehousing	19,902	19,429	18,827	NA	18,865	17,526	-2.51%	3%
81 - Other services, except public administra	21,065	20,478	20,574	20,131	19,850	19,017	-2.02%	4%
44 - Retail Trade	74,021	74,829	73,204	72,836	71,147	66,926	-2.00%	13%

Source: Missouri Economic Research and Information Center, Using Data from the Bureau of Labor Statistics Quarterly Census of Employment and Wages; AECOM, 2009



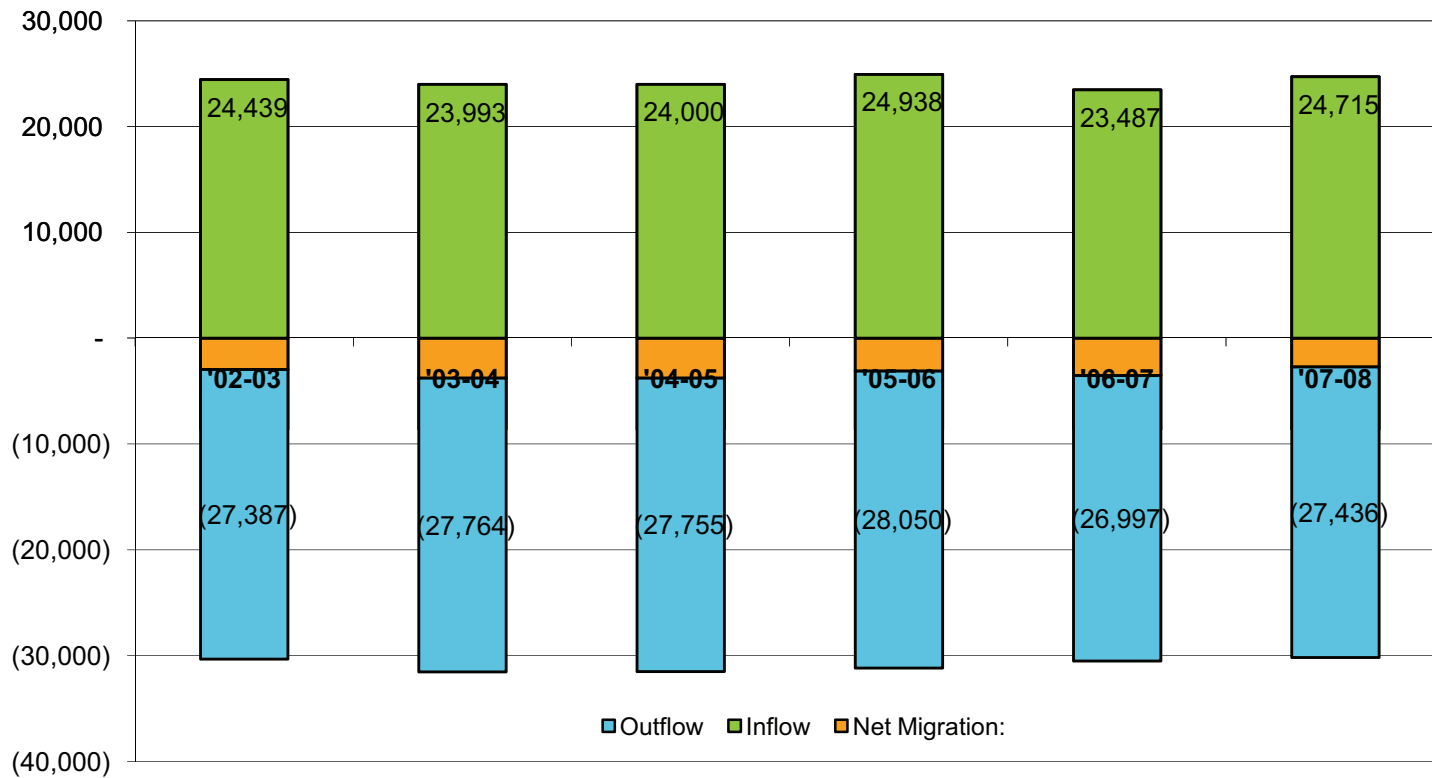
**Appendix Table 7: Summary of Net Migration, 2001-2007**  
*Clayton Downtown Retail Analysis*

	<b>01-'02</b>	<b>'02-03</b>	<b>'03-04</b>	<b>'04-05</b>	<b>'05-06</b>	<b>'06-07</b>	<b>'07-08</b>	<b>TOTAL</b>
Inflow	25,338	24,439	23,993	24,000	24,938	23,487	24,715	145,572
Outflow	(27,867)	(27,387)	(27,764)	(27,755)	(28,050)	(26,997)	(27,436)	(165,389)
<b>Net Migration:</b>	<b>(2,529)</b>	<b>(2,948)</b>	<b>(3,771)</b>	<b>(3,755)</b>	<b>(3,112)</b>	<b>(3,510)</b>	<b>(2,721)</b>	<b>(19,817)</b>

Source: IRS Statistics of Income; AECOM, 2009



**Appendix Figure 4: Net Migration (Households) for St. Louis County  
Clayton Downtown Retail Analysis**



Source: IRS Statistics of Income; ERA AECOM, 2009.

**Appendix Table 8: Top Counties for Migration to St. Louis County**  
**Clayton Downtown Retail Analysis**

Source County	Rank	Household In-Migration							Total	
		'00-'01	'01-'02	'02-'03	'03-'04	'04-'05	'05-'06	06-'07	Avg Annual	#
St. Louis City, MO	1	8,043	7,539	7,638	7,869	7,924	7,430	7,806	7,750	54,249
St. Charles County, MO	2	2,215	2,067	2,127	2,148	2,298	2,188	2,365	2,201	15,408
Jefferson County, MO	3	1,813	1,893	1,835	1,754	1,868	1,858	1,962	1,855	12,983
St. Clair County, IL	4	539	508	545	490	470	489	542	512	3,583
Madison County, IL	5	568	483	449	515	501	471	537	503	3,524
Franklin County, MO	6	409	385	412	388	444	423	390	407	2,851
Cook County, IL	7	370	367	377	343	358	323	347	355	2,485
Boone County, MO	8	273	253	272	275	293	318	307	284	1,991
Los Angeles County, CA	9	167	188	183	193	146	179	150	172	1,206
Greene County, MO	11	205	163	152	169	156	170	167	169	1,182
Cape Girardeau County, MO	12	148	155	132	149	146	140	137	144	1,007
Johnson County, KS	13	162	136	146	149	136	122	109	137	960
Maricopa County, AZ	14	139	138	123	122	118	99	124	123	863
Lincoln County, MO	15	118	83	111	105	139	108	119	112	783
San Diego County, CA	16	115	135	105	96	104	97	102	108	754
St. Francois County, MO	17	108	117	82	82	113	102	119	103	723
Harris County, TX	18	123	116	102	103	94	84	92	102	714
Monroe County, IL	19	85	75	88	85	111	89	106	91	639
Dallas County, TX	20	104	98	82	96	86	94	89	93	649
<b>Total</b>		<b>15,704</b>	<b>14,899</b>	<b>14,961</b>	<b>15,131</b>	<b>15,505</b>	<b>14,784</b>	<b>15,570</b>	<b>12,998</b>	<b>90,984</b>
<b>% of Total In-Migration</b>		<b>62.0%</b>	<b>61.0%</b>	<b>62.4%</b>	<b>63.0%</b>	<b>62.2%</b>	<b>62.9%</b>	<b>63.0%</b>	<b>53.2%</b>	<b>53.2%</b>
<b>Top 20 Counties</b>		<b>15,704</b>	<b>14,899</b>	<b>14,961</b>	<b>15,131</b>	<b>15,505</b>	<b>14,784</b>	<b>15,570</b>	<b>15,222</b>	<b>106,554</b>
<b>Other Counties &amp; Foreign</b>		<b>9,634</b>	<b>9,540</b>	<b>9,032</b>	<b>8,869</b>	<b>9,433</b>	<b>8,703</b>	<b>9,145</b>	<b>9,194</b>	<b>64,356</b>
<b>Total In-Migration</b>		<b>25,338</b>	<b>24,439</b>	<b>23,993</b>	<b>24,000</b>	<b>24,938</b>	<b>23,487</b>	<b>24,715</b>	<b>24,416</b>	<b>170,910</b>

Source: IRS Statistics of Income; AECOM, 2009



**Appendix Table 9: Top States for Migration to St. Louis County**  
**Clayton Downtown Retail Analysis**

Source State	Rank	Household In-Migration							Total	
		'00-'01	'01-'02	'02-'03	'03-'04	'04-'05	'05-'06	06-'07	Avg Annual	#
Missouri	1	14,358	13,651	13,748	13,838	14,436	13,692	14,453	14,025	98,176
Illinois	2	2,201	2,053	2,114	2,074	2,081	1,996	2,187	2,101	14,706
California	3	587	647	618	577	560	532	521	577	4,042
Texas	4	542	461	412	442	400	373	439	438	3,069
Florida	5	395	397	359	390	408	375	384	387	2,708
Kansas	6	253	204	226	217	187	188	168	206	1,443
Colorado	7	224	230	210	181	169	185	160	194	1,359
Michigan	8	151	168	222	157	157	172	247	182	1,274
Ohio	9	148	196	116	156	163	180	163	160	1,122
Georgia	10	171	199	152	165	128	161	125	157	1,101
<b>Total</b>		<b>19,030</b>	<b>18,206</b>	<b>18,177</b>	<b>18,197</b>	<b>18,689</b>	<b>17,854</b>	<b>18,847</b>	<b>15,736</b>	<b>110,153</b>
<b>% of Total In-Migration</b>		<b>75.1%</b>	<b>74.5%</b>	<b>75.8%</b>	<b>75.8%</b>	<b>74.9%</b>	<b>76.0%</b>	<b>76.3%</b>	<b>64.5%</b>	<b>64.5%</b>
<b>Total In-Migration from Top 10 States</b>		<b>19,030</b>	<b>18,206</b>	<b>18,177</b>	<b>18,197</b>	<b>18,689</b>	<b>17,854</b>	<b>18,847</b>	<b>18,429</b>	<b>129,000</b>
<b>Migration from Other States and Foreign</b>		<b>6,308</b>	<b>6,233</b>	<b>5,816</b>	<b>5,803</b>	<b>6,249</b>	<b>5,633</b>	<b>5,868</b>	<b>5,987</b>	<b>41,910</b>
<b>Total In-Migration</b>		<b>25,338</b>	<b>24,439</b>	<b>23,993</b>	<b>24,000</b>	<b>24,938</b>	<b>23,487</b>	<b>24,715</b>	<b>24,416</b>	<b>170,910</b>

Source: IRS Statistics of Income; AECOM, 2009



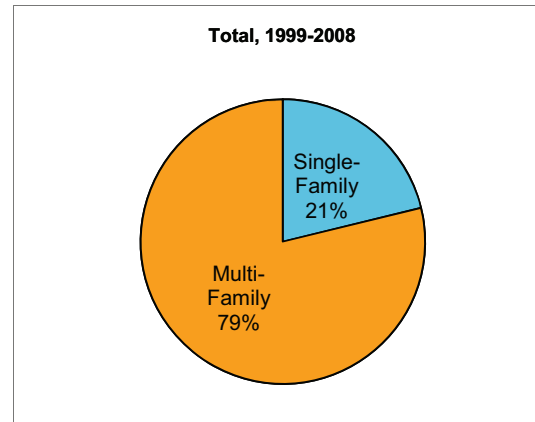
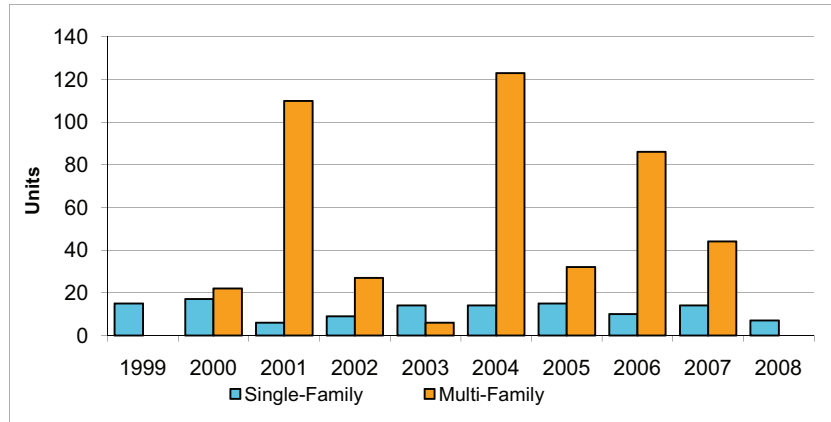
**Appendix Table 10: Building Permit Data, 1999-2008**  
**Clayton Downtown Retail Analysis**

	<u>Clayton</u>		<u>St. Louis County</u>		<u>St. Louis MSA</u>	
	Single-Family	Multi-Family	Single-Family	Multi-Family	Single-Family	Multi-Family
1999	15	0	2,209	673	10,591	2,149
2000	17	22	1,993	698	9,639	2,669
2001	6	110	1,868	586	10,060	1,968
2002	9	27	1,673	507	11,302	3,041
2003	14	6	1,969	288	12,489	2,581
2004	14	123	2,147	478	13,472	2,248
2005	15	32	0	386	0	2,144
2006	10	86	1,431	0	10,138	0
2007	14	44	1,234	224	8,207	2,196
2008	7	0	620	105	4,656	1,079
<b>Total</b>	<b>121</b>	<b>450</b>	<b>15,144</b>	<b>3,945</b>	<b>90,554</b>	<b>20,075</b>
<b>1999 - 2008 Avg Annl</b>	<b>12</b>	<b>45</b>	<b>1,514</b>	<b>395</b>	<b>9,055</b>	<b>2,008</b>
<b>1999-2003</b>						
Total Permitted Units	61	165	9,712	2,752	54,081	12,408
Average Annual	12	33	1,942	550	10,816	2,482
<b>2004-2008</b>						
Total Permitted Units	60	285	5,432	1,193	36,473	7,667
Average Annual	12	57	1,086	239	7,295	1,533

Source: US Census Bureau; AECOM, 2009

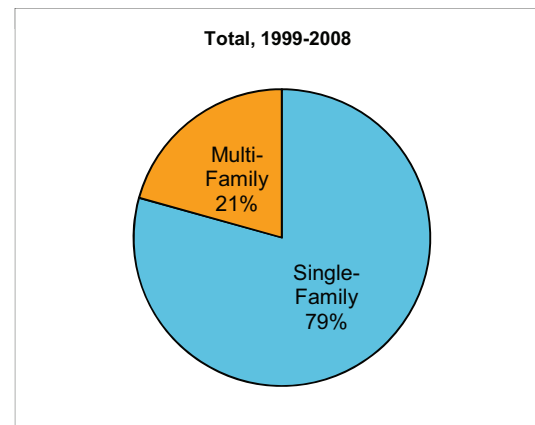
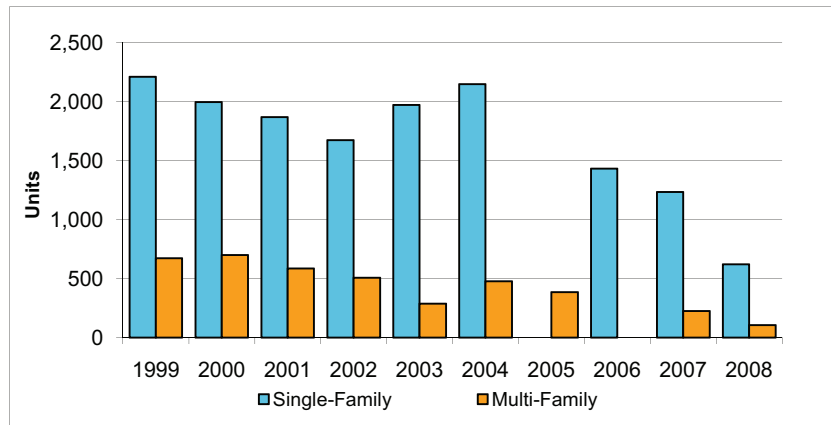


**Appendix Figure 5: City of Clayton Residential Building Permits by Type, 1999-2008**  
*Clayton Downtown Retail Analysis*



Source: Census Bureau, as reported on US Department of Housing and Urban Development, SOCDs; AECOM, 2009

**Appendix Figure 6: St. Louis County Residential Building Permits by Type, 1999-2008**  
*Clayton Downtown Retail Analysis*



Source: Census Bureau, as reported on US Department of Housing and Urban Development, SOCDs; AECOM, 2009



**Appendix Table 11: St. Louis County Employment Based Office Demand  
Clayton Downtown Retail Analysis**

Employment Sector	% Office Users /1	Total Demand for New Space (SF)		Avg. Ann'l 2009-2020
		2009-2015	2015-2020	
Mining	10%	1,215	1,485	245.5
Construction	20%	154,980	184,455	30,857.7
Manufacturing	20%	(10,125)	(20,250)	(2,761.4)
Trans./Comm./Public Utilities	70%	649,058	804,825	132,171.1
Wholesale Trade	30%	170,168	190,823	32,817.3
Retail Trade	30%	363,150	432,135	72,298.6
Finance/Insurance/Real Estate	90%	1,269,270	1,537,380	255,150.0
Services	50%	3,161,588	3,891,938	641,229.5
Government	70%	28,980	32,918	5,627.0
<b>Demand From New Employment:</b>		<b>5,788,283</b>	<b>7,055,707</b>	<b>1,167,635</b>
Plus Vacancy Adjustment: /2		289,414	352,785	58,382
Plus Cumulative Replacement Demand: /3		289,414	352,785	58,382
<b>TOTAL DEMAND (In 000s of Sq. Ft.):</b>		<b>6,367,000</b>	<b>7,761,000</b>	<b>1,284,000</b>

1/ Reflects office-using employees in each employment sector

2/ This allows for a 5% frictional vacancy rate in new space delivered to the market

3/ This represents new space required by existing businesses to replace obsolete or otherwise unusable space. This is assumed to represent 5% of total implied demand

Source: Woods & Poole, Inc; AECOM, 2009





**Appendix Table 12: Clayton CBD Trade Area Demographics**  
**Clayton CBD Retail Analysis**  
**City of Clayton, MO**

	Primary	Secondary	Tertiary	Total
<b>Population</b>				
2000	1,629	114,559	201,974	318,162
2009	1,636	111,199	197,127	309,962
2014	1,636	109,428	194,974	306,038
Annual Growth Rate 2000-2009	0.1%	-0.6%	-0.5%	-0.5%
Projected Annual Growth Rate 2009-2014	0.0%	-0.3%	-0.2%	-0.3%
<b>Households</b>				
2000	324	50,491	87,291	138,106
2009	332	49,655	85,952	135,939
2014	332	49,095	85,401	134,828
Annual Growth Rate 2000-2009	0.5%	-0.3%	-0.3%	-0.3%
Projected Annual Growth Rate 2009-2014	0.0%	-0.2%	-0.1%	-0.2%
<b>2009 Income Profile</b>				
Per Capita Income	\$39,967	\$36,859	\$28,884	n/a
Median Household	\$85,981	\$54,737	\$47,196	n/a
% of Total Households Earning \$75,000 or above	43.10%	21.50%	15.10%	n/a
<b>2009 Average Household Retail Expenditure /1</b>	<b>\$ 31,513</b>	<b>\$ 18,983</b>	<b>\$ 15,344</b>	<b>n/a</b>

1/ Includes the following retail categories: Food and Non Alcoholic Beverages at home, Prescription Drugs, Nonprescription Drugs, Personal Care Products, Alcoholic Beverages, Apparel, Computer Hardware/Software, Audio and Video Equipment, Household Textiles, Furniture, Floor Coverings, Major Appliances, Housewares, Small Appliances, Housekeeping Supplies, Pets, Toys and Games, Sports/Recreation/Exercise Equipment, Photo Equipment and Supplies, Reading, and Food Away From Home. Avg. U.S. Household Expenditures in these categories equal approx. \$17,000/year.

Source: ESRI, 2009; AECOM, January 2010



**Appendix Table 13: 2009 Clayton CBD Retail Supply and Estimated Sales**  
**Clayton CBD Retail Analysis**  
**City of Clayton, MO**

	Existing SF	Est Sales Productivity	Est Sales	Primary & Secondary Residential TA Estimated Existing Capture			Tertiary Residential TA Estimated Existing Capture		
				70% of Total CBD sales	2009 Total Primary and Secondary TA Spending	Est. Existing CBD Capture of Primary & Secondary TA Spending	20% of Total CBD Sales	2009 Total Tertiary TA Spending	Est. Existing CBD Capture of Tertiary TA Spending
Convenience/Personal Care	94,912	\$200	\$18,982,434	\$13,287,704	\$306,006,831	4%	\$4,745,609	\$430,143,470	1%
Specialty Retail/Shoppers Goods	70,936	\$200	\$14,187,183	\$9,931,028	\$446,954,286	2%	\$3,546,796	\$615,747,780	1%
Food and Beverage	198,971	\$200	\$39,794,202	\$27,855,941	\$184,137,062	15%	\$9,948,550	\$387,689,705	3%
<b>Total</b>	<b>364,819</b>		<b>\$72,963,818</b>	<b>\$51,074,673</b>	<b>\$937,098,179</b>	<b>5%</b>	<b>\$18,240,955</b>	<b>\$1,433,580,954</b>	<b>1%</b>

Source: ESRI Business Analyst AECOM, January 2010



**Appendix Table 14: 2014 Estimated CBD Potential Retail Capture Rates by Market  
Clayton CBD Retail Analysis  
City of Clayton, MO**

	<u>Visitors</u>	<u>Employees</u>	<u>Residential Trade Areas</u>			<u>Inflow</u>
			<u>Primary</u>	<u>Secondary</u>	<u>Tertiary</u>	
<b>Convenience</b>						
Food & beverage stores	40.0%	40.0%	50.0%	10.0%	1.0%	1.0%
Health & personal care stores	40.0%	40.0%	50.0%	5.0%	1.0%	1.0%
<b>Shoppers Goods</b>						
General merchandise stores	5.0%	5.0%	5.0%	5.0%	1.0%	1.0%
Clothing & clothing accessories stores	10.0%	10.0%	10.0%	5.0%	1.0%	2.5%
Sporting goods, hobby, book, & music stores	5.0%	5.0%	10.0%	5.0%	1.0%	1.0%
Furniture & home furnishings stores	5.0%	5.0%	10.0%	5.0%	1.0%	5.0%
Electronics & appliance stores	5.0%	5.0%	10.0%	5.0%	1.0%	1.0%
Miscellaneous store retailers	10.0%	5.0%	10.0%	5.0%	1.0%	1.0%
<b><u>Eating and Drinking</u></b>						
Full-Service	30.0%	50.0%	25.0%	10.0%	5.0%	10.0%
Limited-Service	30.0%	65.0%	30.0%	5.0%	2.0%	10.0%



**Appendix Table 15: 2014 Est. Retail Productivity Rates by Store Type  
Clayton CBD Retail Analysis  
City of Clayton, MO**

<b>Sales Per SF</b>	<b>Low</b>	<b>High</b>	<b>Median</b>
<b>Convenience</b>			
Food & beverage stores	\$400	\$450	\$425
Health & personal care stores	\$400	\$600	\$500
<b>Shoppers Goods</b>			
General merchandise stores	\$250	\$300	\$275
Clothing & clothing accessories stores	\$300	\$350	\$325
Sporting goods, hobby, book, & music stores	\$250	\$300	\$275
Furniture & home furnishings stores	\$250	\$300	\$275
Electronics & appliance stores	\$450	\$550	\$500
Miscellaneous store retailers	\$250	\$300	\$275
<b>Eating and Drinking</b>			
Full-Service	\$450	\$550	\$500
Limited-Service	\$450	\$500	\$475
<b>Avg (not weighted)</b>	<b>\$336</b>	<b>\$409</b>	<b>\$373</b>

Source: Urban Land Institute 2008 Dollars and Cents of Shopping Centers; AECOM, January 2010



**Appendix Table 16: Est. Clayton CBD Employee Spending**  
**Clayton CBD Retail Analysis**  
**City of Clayton, MO**

	<u>2009</u>	<u>2014</u>
Employees within Study Area/ 1	35,000	35,900
Employment Growth Rate/New Employees	0.500%	

<b>Share of Employee Sales from Residents in: /2</b>		
Primary Trade Area (CBD)	0.3%	0.3%
Secondary Trade Area (0-3 mi, net of CBD)	12.0%	12.0%
Tertiary Trade Area (3-5 mi)	11.2%	11%

<b>Per Employee Spending /3</b>	<b>Closer to the</b>	
	<b>Total</b>	<b>Office</b>
Lunch	\$1,576	\$1,576
Shoppers Goods	\$3,249	\$1,105
Convenience Goods	\$2,625	\$892
Dinner/Drinks	\$757	\$189
<b>Total Annual Estimated Spending Per Employee</b>	<b>\$8,207</b>	<b>\$3,762</b>

	<b>Per Employee Spending-- Total</b>	<b>Per Employee Spending Closer to Work</b>	<b>2009</b>		<b>2014</b>	
			<b>Downtown Clayton Employee Spending</b>	<b>Downtown Clayton Employee Spending</b>	<b>Capture Rate</b>	<b>2014 Captured Spending</b>
<b>Convenience Retail</b>						
Food & beverage stores	\$1,312	\$446	\$15,615,935	\$16,017,488	40%	\$6,406,995
Health & personal care stores	\$1,312	\$446	\$15,615,935	\$16,017,488	40%	\$6,406,995
	<b>\$2,625</b>	<b>\$892</b>	<b>\$31,231,871</b>	<b>\$32,034,976</b>		<b>\$12,813,990</b>
<b>Shoppers Goods Retail</b>						
General merchandise stores	\$1,574	\$535	\$18,736,343	\$19,218,135	5%	\$960,907
Clothing & clothing accessories stores	\$754	\$256	\$8,973,358	\$9,204,102	10%	\$920,410
Sporting goods, hobby, book, & music stores	\$205	\$70	\$2,434,828	\$2,497,438	5%	\$124,872
Furniture & home furnishings stores	\$253	\$86	\$3,016,014	\$3,093,569	5%	\$154,678
Electronics & appliance stores	\$326	\$111	\$3,875,087	\$3,974,733	5%	\$198,737
Miscellaneous store retailers	\$137	\$47	\$1,627,662	\$1,669,517	5%	\$83,476
	<b>\$3,249</b>	<b>\$1,105</b>	<b>\$38,663,294</b>	<b>\$39,657,493</b>		<b>\$2,443,080</b>
<b>Restaurants</b>						
Full-Service	\$1,356	\$930	\$32,550,612	\$33,387,628	50%	\$16,693,814
Limited-Service	\$977	\$835	\$29,238,609	\$29,990,459	65%	\$19,493,799
	<b>\$2,333</b>	<b>\$1,765</b>	<b>\$61,789,221</b>	<b>\$63,378,087</b>		<b>\$36,187,612</b>

1/ City of Clayton CBD Employment Estimate. Census Longitudnal Employment Data suggests approximately 22,000.

2/ Census Longitudnal Employment Patterns, "On the Map," 2008

3/ Based on International Council of Shopping Centers Office Worker Spending Patterns, 2007, adjusted for inflation to 2009 dollars

Source: As Noted; AECOM, January 2010



**Appendix Table 17: Est. Clayton CBD Visitor Spending**  
**Clayton CBD Retail Analysis**  
**City of Clayton, MO**

Hotel Rooms	841
Occupancy /1	60%
Days Per Year	365
Persons Per Party /1	1.5
Avg Length of Trip/ 1	2.5
Hotel Overnight Visitors	111,000
Visiting Friends and Family /2	15,246
Total Visitors	126,246

Per Night Hotel Expenditures (ADR) /1 \$175

Expenditures by Category	In-State	Out-of-State	Share of		Share of Non Lodging	Est. Per
			Out of State	\$ Per Day		Person Clayton CBD
Lodging	\$180	\$203	24%	\$19	0%	\$175
Meals/Food/Groceries	\$128	\$159	19%	\$15	24%	\$56
Entertainment	\$59	\$91	11%	\$9	14%	\$32
Shopping	\$139	\$172	20%	\$16	26%	\$60
Transportation	\$96	\$122	14%	\$12	19%	\$43
Attractions	\$51	\$63	7%	\$6	10%	\$22
Other	\$58	\$46	5%	\$4	7%	\$16
<b>Total</b>	<b>\$712</b>	<b>\$856</b>	<b>100%</b>	<b>\$81</b>		<b>\$404</b>
<b>Per-person/Per-day</b>	<b>\$71</b>	<b>\$81</b>				

Source: Strategic Marketing & Research, Inc., CY08 Ad & PR Effectiveness Study

Retail Store Type	Entertainment		Rest		Shopping		Total	
	%	\$	%	\$	%	\$	Per Visitor	Total
<b>Convenience</b>								
Food & beverage stores	0%	\$0	5%	\$3	0%	\$0	\$3	\$352,590
Health & personal care stores	0%	\$0	0%	\$0	20%	\$15	\$15	\$1,933,702
							<b>\$18</b>	<b>\$2,286,292</b>
<b>Other Retail</b>								
General merchandise stores	0%	\$0	0%	\$0	10%	\$8	\$8	\$966,851
Clothing & clothing accessories stores	0%	\$0	0%	\$0	15%	\$11	\$11	\$1,450,277
Sporting goods, hobby, book, & music stores	0%	\$0	0%	\$0	10%	\$8	\$8	\$966,851
Furniture & home furnishings stores	0%	\$0	0%	\$0	10%	\$8	\$8	\$966,851
Electronics & appliance stores	0%	\$0	0%	\$0	10%	\$8	\$8	\$966,851
Miscellaneous store retailers	0%	\$0	0%	\$0	25%	\$19	\$19	\$2,417,128
							<b>\$61</b>	<b>\$7,734,808</b>
<b>Eating and Drinking</b>								
Full-Service	25%	\$14	50%	\$28	0%	\$0	\$41	\$5,233,414
Limited-Service	25%	\$14	45%	\$25	0%	\$0	\$39	\$4,880,824
							<b>\$80</b>	<b>\$10,114,238</b>
<b>Total</b>		<b>\$54</b>		<b>\$56</b>		<b>\$77</b>	<b>\$159</b>	<b>\$20,135,338</b>

1/ AECOM used best guess estimates based on industry experience of competitive supply and visitation in similar areas.

2/ Estimating 1 visitor per resident of Clayton in 2014

Source: Missouri Department of Tourism; as noted: AECOM, January 2010



**Appendix Table 18: 2014 Total Resident Market Spending by Trade Area**  
**Clayton CBD Retail Analysis**  
**City of Clayton, MO**

	2014		
	Primary	Secondary	Tertiary
Food & beverage stores	\$ 2,938,126	\$ 261,252,098	\$ 370,093,710
Health & personal care stores	\$ 490,789	\$ 41,711,595	\$ 60,767,847
<b>Convenience Stores</b>	<b>\$ 3,428,915</b>	<b>\$ 302,963,694</b>	<b>\$ 430,861,557</b>
General merchandise stores	\$ 2,395,610	\$ 213,324,114	\$ 299,672,408
Clothing & clothing accessories stores	\$ 1,147,325	\$ 103,220,859	\$ 142,551,812
Sporting goods, hobby, book, & music stores	\$ 311,315	\$ 27,683,050	\$ 38,675,840
Furniture & home furnishings stores	\$ 385,625	\$ 34,423,243	\$ 46,975,960
Electronics & appliance stores	\$ 495,465	\$ 44,478,232	\$ 62,217,765
Miscellaneous store retailers	\$ 208,111	\$ 18,598,372	\$ 26,009,239
<b>Shoppers Goods Stores</b>	<b>\$ 4,943,451</b>	<b>\$ 441,727,870</b>	<b>\$ 616,103,024</b>
Full Service	\$ 1,190,204	\$ 107,618,127	\$ 280,453,876
Limited Service	\$ 885,283	\$ 79,904,553	\$ 111,626,552
	<b>\$ 2,075,487</b>	<b>\$ 187,522,680</b>	<b>\$ 392,080,428</b>
<b>Total</b>	<b>\$ 10,447,853</b>	<b>\$ 932,214,244</b>	<b>\$ 1,439,045,009</b>

	2014 Employee Spending By Resident Trade Area		
	Primary	Secondary	Tertiary
Food & beverage stores	\$ 19,221	\$ 768,839	\$ 717,583
Health & personal care stores	\$ 19,221	\$ 768,839	\$ 717,583
<b>Convenience Stores</b>	<b>\$ 38,442</b>	<b>\$ 1,537,679</b>	<b>\$ 1,435,167</b>
General merchandise stores	\$ 2,883	\$ 115,309	\$ 107,622
Clothing & clothing accessories stores	\$ 2,761	\$ 110,449	\$ 103,086
Sporting goods, hobby, book, & music stores	\$ 375	\$ 14,985	\$ 13,986
Furniture & home furnishings stores	\$ 464	\$ 18,561	\$ 17,324
Electronics & appliance stores	\$ 596	\$ 23,848	\$ 22,259
Miscellaneous store retailers	\$ 250	\$ 10,017	\$ 9,349
<b>Shoppers Goods Stores</b>	<b>\$ 7,329</b>	<b>\$ 293,170</b>	<b>\$ 273,625</b>
Full Service	\$ 50,081	\$ 2,003,258	\$ 1,869,707
Limited Service	\$ 58,481	\$ 2,339,256	\$ 2,183,305
	<b>\$ 108,563</b>	<b>\$ 4,342,513</b>	<b>\$ 4,053,013</b>
<b>Total</b>	<b>\$ 154,334</b>	<b>\$ 6,173,362</b>	<b>\$ 5,761,804</b>

	2014 Net Resident Spending		
	Primary	Secondary	Tertiary
Food & beverage stores	\$ 2,918,905	\$ 260,483,259	\$ 369,376,126
Health & personal care stores	\$ 471,568	\$ 40,942,756	\$ 60,050,264
<b>Convenience Stores</b>	<b>\$ 3,390,473</b>	<b>\$ 301,426,015</b>	<b>\$ 429,426,390</b>
General merchandise stores	\$ 2,392,728	\$ 213,208,805	\$ 299,564,787
Clothing & clothing accessories stores	\$ 1,144,564	\$ 103,110,410	\$ 142,448,726
Sporting goods, hobby, book, & music stores	\$ 310,940	\$ 27,668,066	\$ 38,661,854
Furniture & home furnishings stores	\$ 385,161	\$ 34,404,681	\$ 46,958,636
Electronics & appliance stores	\$ 494,869	\$ 44,454,384	\$ 62,195,507
Miscellaneous store retailers	\$ 207,861	\$ 18,588,355	\$ 25,999,890
<b>Shoppers Goods Stores</b>	<b>\$ 4,936,121</b>	<b>\$ 441,434,701</b>	<b>\$ 615,829,399</b>
Full Service	\$ 1,140,123	\$ 105,614,869	\$ 278,584,169
Limited Service	\$ 826,801	\$ 77,565,298	\$ 109,443,246
	<b>\$ 1,966,924</b>	<b>\$ 183,180,167</b>	<b>\$ 388,027,415</b>
<b>Total</b>	<b>\$ 10,293,519</b>	<b>\$ 926,040,882</b>	<b>\$ 1,433,283,205</b>

Source: ESRI; AECOM, January 2010



**Appendix Table 19: 2014 Estimated Potential Captured Resident Market Spending**  
**Clayton CBD Retail Analysis**  
**City of Clayton, MO**

	2014 Spending		
	Primary	Secondary	Tertiary
Food & beverage stores	\$ 2,918,905	\$ 260,483,259	\$ 369,376,126
Health & personal care stores	\$ 471,568	\$ 40,942,756	\$ 60,050,264
<b>Convenience Stores</b>	<b>\$ 3,390,473</b>	<b>\$ 301,426,015</b>	<b>\$ 429,426,390</b>
General merchandise stores	\$ 2,392,728	\$ 213,208,805	\$ 299,564,787
Clothing & clothing accessories stores	\$ 1,144,564	\$ 103,110,410	\$ 142,448,726
Sporting goods, hobby, book, & music stores	\$ 310,940	\$ 27,668,066	\$ 38,661,854
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Electronics & appliance stores	\$ 494,869	\$ 44,454,384	\$ 62,195,507
Miscellaneous store retailers	\$ 207,861	\$ 18,588,355	\$ 25,999,890
<b>Shoppers Goods Stores</b>	<b>\$ 4,936,121</b>	<b>\$ 441,434,701</b>	<b>\$ 615,829,399</b>
Full Service	\$ 1,140,123	\$ 105,614,869	\$ 278,584,169
Limited Service	\$ 826,801	\$ 77,565,298	\$ 109,443,246
	<b>\$ 1,966,924</b>	<b>\$ 183,180,167</b>	<b>\$ 388,027,415</b>
<b>Total</b>	<b>\$ 10,293,519</b>	<b>\$ 926,040,882</b>	<b>\$ 1,433,283,205</b>

	Capture Rates		
	Primary	Secondary	Tertiary
Food & beverage stores	50%	10%	1%
Health & personal care stores	50%	5%	1%
General merchandise stores	5%	5%	1%
Clothing & clothing accessories stores	10%	5%	1%
Sporting goods, hobby, book, & music stores	10%	5%	1%
Furniture & home furnishings stores	10%	5%	1%
Electronics & appliance stores	10%	5%	1%
Miscellaneous store retailers	10%	5%	1%
Full Service	25%	10%	5%
Limited Service	30%	5%	2%

	Captured Spending			Total--All Residential Markets
	Primary	Secondary	Tertiary	
Food & beverage stores	\$1,459,452	\$26,048,326	\$3,693,761	\$31,201,539
Health & personal care stores	\$235,784	\$2,047,138	\$600,503	\$2,883,424
<b>Convenience Stores</b>	<b>\$1,695,236</b>	<b>\$28,095,464</b>	<b>\$4,294,264</b>	<b>\$34,084,964</b>
General merchandise stores	\$119,636	\$10,660,440	\$2,995,648	\$13,775,725
Clothing & clothing accessories stores	\$114,456	\$5,155,520	\$1,424,487	\$6,694,464
Sporting goods, hobby, book, & music stores	\$31,094	\$1,383,403	\$386,619	\$1,801,116
Furniture & home furnishings stores	\$38,516	\$1,720,234	\$469,586	\$2,228,336
Electronics & appliance stores	\$49,487	\$2,222,719	\$621,955	\$2,894,161
Miscellaneous store retailers	\$20,786	\$929,418	\$259,999	\$1,210,203
<b>Shoppers Goods Stores</b>	<b>\$373,976</b>	<b>\$22,071,735</b>	<b>\$6,158,294</b>	<b>\$28,604,005</b>
Full Service	\$285,031	\$10,561,487	\$13,929,208	\$24,775,726
Limited Service	\$248,040	\$3,878,265	\$2,188,865	\$6,315,170
<b>Restaurants</b>	<b>\$533,071</b>	<b>\$14,439,752</b>	<b>\$16,118,073</b>	<b>\$31,090,896</b>
<b>Total Potential Sales</b>	<b>\$2,602,283</b>	<b>\$64,606,951</b>	<b>\$26,570,631</b>	<b>\$93,779,865</b>

Source: ESRI Business Analyst; AECOM, January 2010





**Appendix Table 19: 2014 Estimated Potential Captured Resident Market Spending  
Clayton CBD Retail Analysis  
City of Clayton, MO**

	Residential Trade			Total Captured Sales
	Areas	Visitors	Employees	From All Markets
Food & beverage stores	\$31,201,539	\$141,036	\$6,406,995	\$37,749,571
Health & personal care stores	\$2,883,424	\$773,481	\$6,406,995	\$10,063,901
<b>Convenience Stores</b>	<b>\$34,084,964</b>	<b>\$914,517</b>	<b>\$12,813,990</b>	<b>\$47,813,471</b>
General merchandise stores	\$13,775,725	\$48,343	\$960,907	\$14,784,974
Clothing & clothing accessories stores	\$6,694,464	\$145,028	\$920,410	\$7,759,902
Sporting goods, hobby, book, & music stores	\$1,801,116	\$48,343	\$124,872	\$1,974,330
Furniture & home furnishings stores	\$2,228,336	\$48,343	\$154,678	\$2,431,357
Electronics & appliance stores	\$2,894,161	\$48,343	\$198,737	\$3,141,240
Miscellaneous store retailers	\$1,210,203	\$241,713	\$83,476	\$1,535,391
<b>Shoppers Goods Stores</b>	<b>\$28,604,005</b>	<b>\$580,111</b>	<b>\$2,443,080</b>	<b>\$31,627,195</b>
Full Service	\$24,775,726	\$1,570,024	\$16,693,814	\$43,039,564
Limited Service	\$6,315,170	\$1,464,247	\$19,493,799	\$27,273,216
	<b>\$31,090,896</b>	<b>\$3,034,271</b>	<b>\$36,187,612</b>	<b>\$70,312,780</b>
<b>Total</b>	<b>\$93,779,865</b>	<b>\$4,528,899</b>	<b>\$51,444,682</b>	<b>\$149,753,446</b>

Source: AECOM, January 2010



**Appendix Table 20: 2014 Total Estimated Potential Captured Spending Plus Inflow  
Clayton CBD Retail Analysis  
City of Clayton, MO**

	2014 Captured Spending	Inflow Rate	Total Spending
Food & beverage stores	\$37,749,571	1%	\$38,127,000
Health & personal care stores	\$10,063,901	1%	\$10,165,000
<b>Convenience Stores</b>	<b>\$47,813,471</b>		<b>\$48,292,000</b>
General merchandise stores	\$14,784,974	1%	\$14,933,000
Clothing & clothing accessories stores	\$7,759,902	3%	\$7,954,000
Sporting goods, hobby, book, & music stores	\$1,974,330	1%	\$1,994,000
Furniture & home furnishings stores	\$2,431,357	5%	\$2,553,000
Electronics & appliance stores	\$3,141,240	1%	\$3,173,000
Miscellaneous store retailers	\$1,535,391	1%	\$1,551,000
<b>Shoppers Goods Stores</b>	<b>\$31,627,195</b>		<b>\$32,158,000</b>
Full Service	\$43,039,564	10%	\$47,344,000
Limited Service	\$27,273,216	10%	\$30,001,000
	<b>\$70,312,780</b>		<b>\$77,345,000</b>
<b>Total</b>	<b>\$149,753,446</b>		<b>\$157,795,000</b>



**Appendix Table 21: 2014 Estimated Supportable Square Feet  
Clayton CBD Retail Analysis  
City of Clayton, MO**

	2014 Sales	Productivity Rate		Supportable SF	
		Low	High		
Food & beverage stores	\$38,127,000	\$400	\$450	95,300	84,700
Health & personal care stores	\$10,165,000	\$400	\$600	25,400	16,900
<b>Convenience Stores</b>	<b>\$48,292,000</b>			<b>120,700</b>	<b>101,600</b>
General merchandise stores	\$14,933,000	\$250	\$300	59,700	49,800
Clothing & clothing accessories stores	\$7,954,000	\$300	\$350	26,500	22,700
Sporting goods, hobby, book, & music stores	\$1,994,000	\$250	\$300	8,000	6,600
Furniture & home furnishings stores	\$2,553,000	\$250	\$300	10,200	8,500
Electronics & appliance stores	\$3,173,000	\$450	\$550	7,100	5,800
Miscellaneous store retailers	\$1,551,000	\$250	\$300	6,200	5,200
<b>Shoppers Goods Stores</b>	<b>\$32,158,000</b>			<b>117,700</b>	<b>98,600</b>
Full Service	\$47,344,000	\$450	\$550	105,200	86,100
Limited Service	\$30,001,000	\$450	\$500	66,700	60,000
	<b>\$77,345,000</b>			<b>171,900</b>	<b>146,100</b>
<b>Total</b>	<b>\$157,795,000</b>			<b>410,300</b>	<b>346,300</b>

<b>Range of Supportable SF</b>	<b>346,300 - 410,300 square feet</b>
--------------------------------	--------------------------------------

Source: AECOM, January 2010



**Appendix Table 22: Clayton Downtown Retail Supply by Area**

<b>District Name</b>	<b>Businesses</b>	<b>Total Retail SF w/ Banks</b>	<b>Total Retail SF w/o Banks</b>	<b>% of Total SF</b>	<b>% of Total Retail (w/o Banks)</b>
Maryland Gateway	22	29,360	29,360	6.34%	8.05%
Park View	16	100,567	59,938	21.71%	16.44%
Meramec Gateway	7	12,941	7,734	2.79%	2.12%
North Central	66	148,952	119,808	32.15%	32.87%
Central	11	67,687	64,021	14.61%	17.56%
East Village	37	103,749	83,658	22.40%	22.95%
<b>Total</b>	<b>159</b>	<b>463,256</b>	<b>364,519</b>	<b>100.00%</b>	<b>100.00%</b>

Source: AECOM, 2010



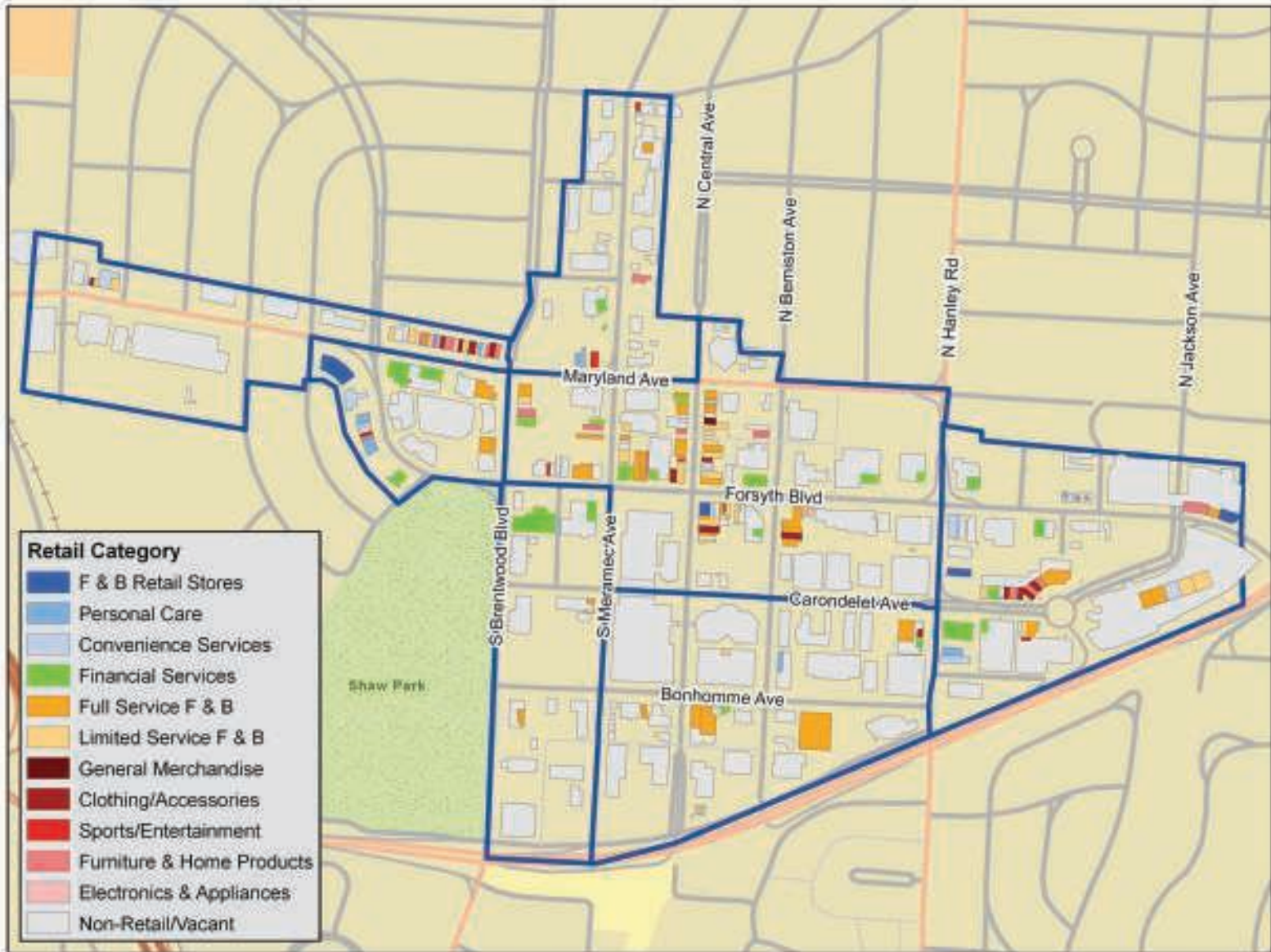
**Appendix Table 23: Benchmarking of Clayton with Comparable/Relevant Downtown Examples**

City	Metropolitan Area	Est.DT DU's	Estimated DT Residents	Est. DT Office Pop	Metro Area Population	City Pop.	Avg Ann'l MSA HH Income	Avg Ann'l City HH Income	Estimated DT Retail SF	Downtown Office SF	Est. DT Hotel Rooms
<b>Clayton</b>	<b>St Louis MO</b>	<b>379</b>	<b>1,636</b>	<b>35,000</b>	<b>2,850,518</b>	<b>15,453</b>	<b>\$ 71,959</b>	<b>\$ 130,346</b>	<b>364,819</b>	<b>6,942,872</b>	<b>841</b>
Bellevue	Seattle WA	2,750	6,050	53,000	3,428,566	118,000	\$ 86,819	\$ 77,466	3,693,000	8,667,000	815
Buckhead	Atlanta GA	22,000	41,800	115,000	5,543,990	493,028	\$ 87,730	\$ 121,000	4,200,000	23,000,000	5,300
Bethesda	Washington DC	3,000	5,700		5,448,329	56,852	\$ 105,008	\$ 169,333	2,788,404	8,068,325	1,555
Palo Alto	San Francisco CA			21,200	6,436,964	59,681	\$ 83,209	\$ 183,630	1,100,000	5,300,000	458
Cherry Creek	Denver CO	2,300	5,050		2,552,104	21,567	\$ 88,347	\$ 70,092	1,300,000	2,557,871	505
Evanston	Chicago IL	3,990	5,187		9,756,941	59,681	\$ 83,654	\$ 183,630	707,000	2,537,726	749
Highland Park	Chicago IL	1,680	3,527		9,756,941	28,174	\$ 83,654	\$ 120,688	890,000	846,001	149
Reston	Washington DC	1,150	2,000	30,000	5,448,329	58,947	\$ 105,008	\$ 134,550	1,700,000	6,000,000	650

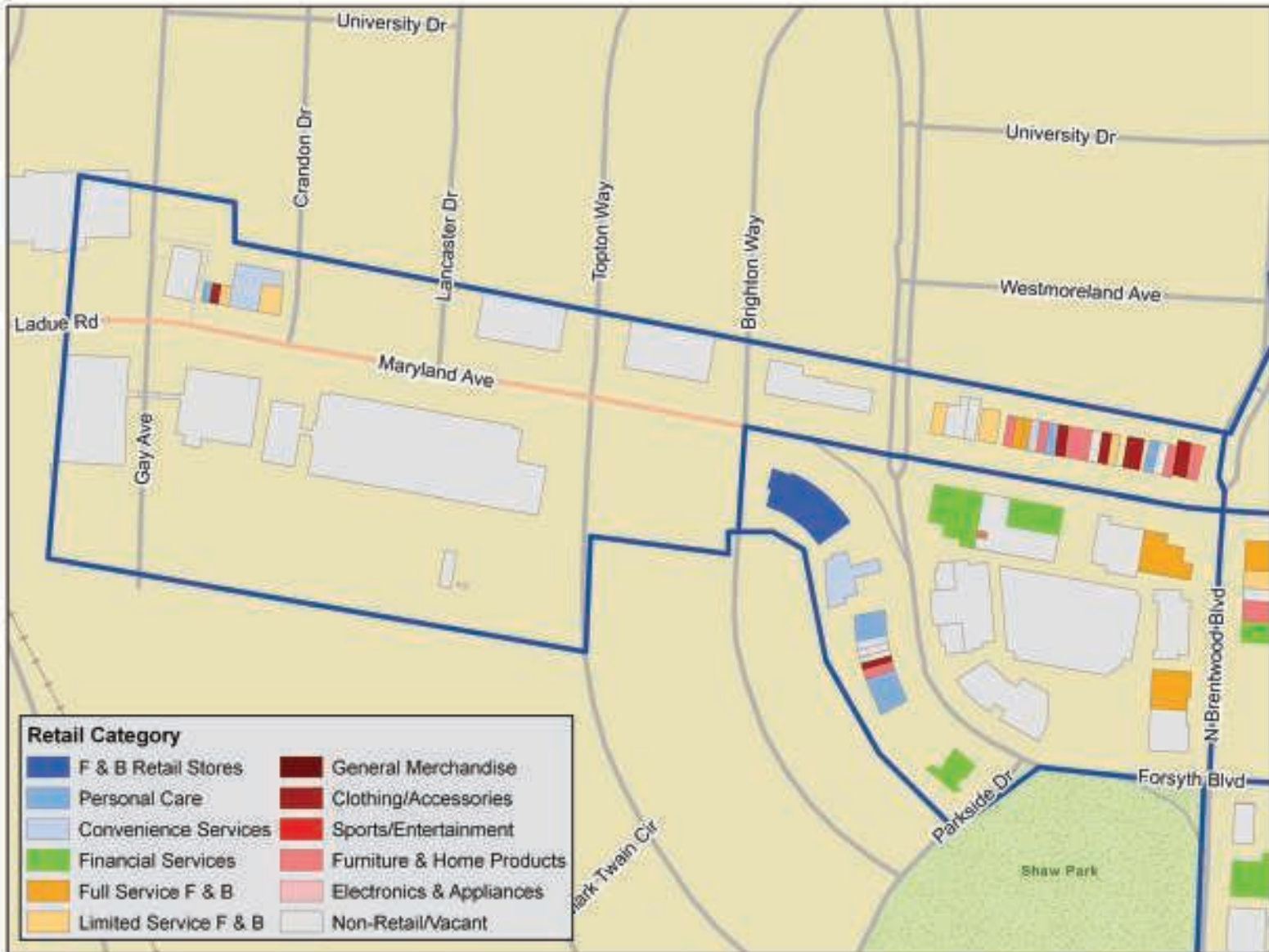
Source: AECOM, 2010

## Maps

# Clayton CBD Retail Supply

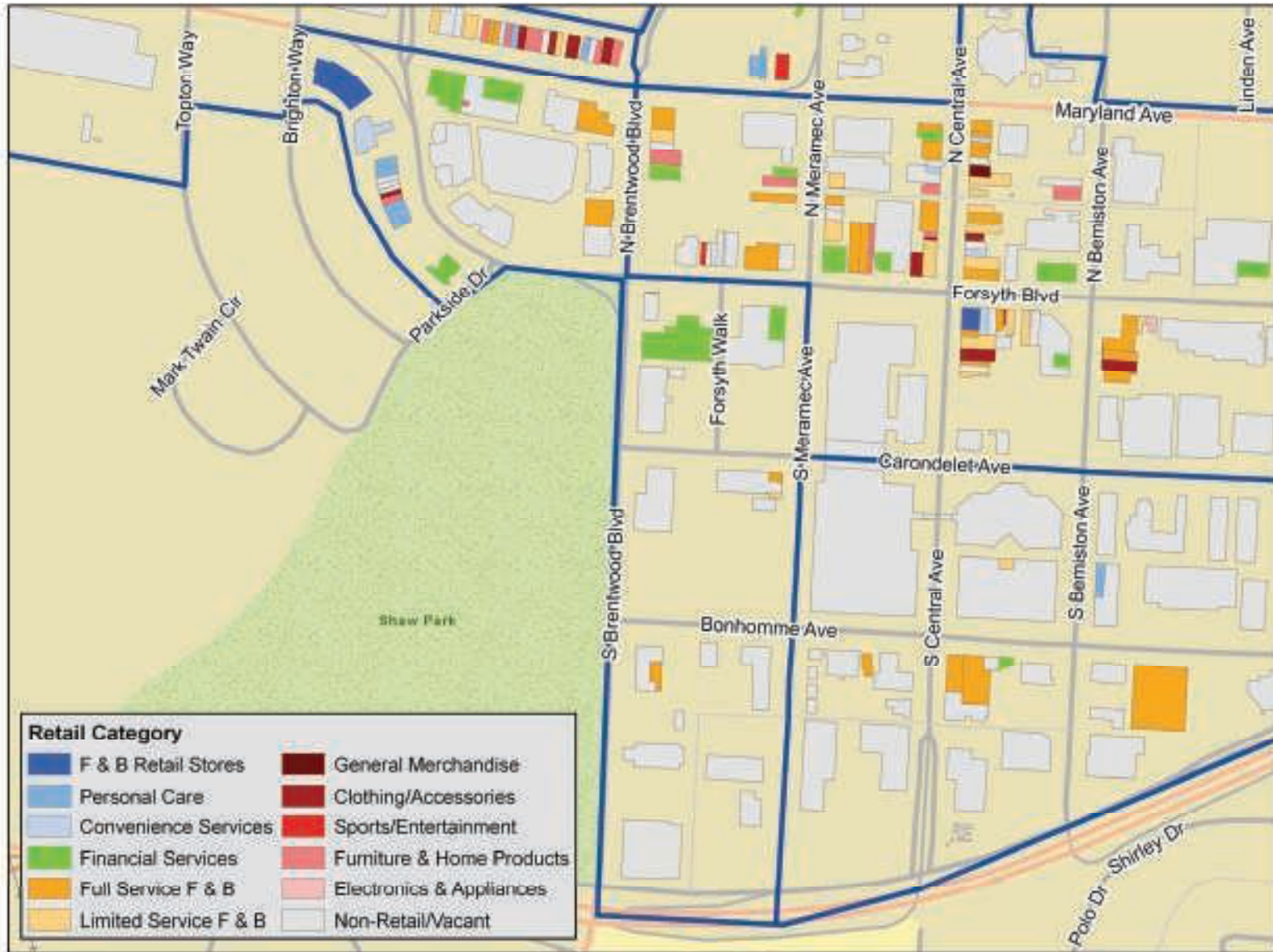


# Maryland Gateway Retail

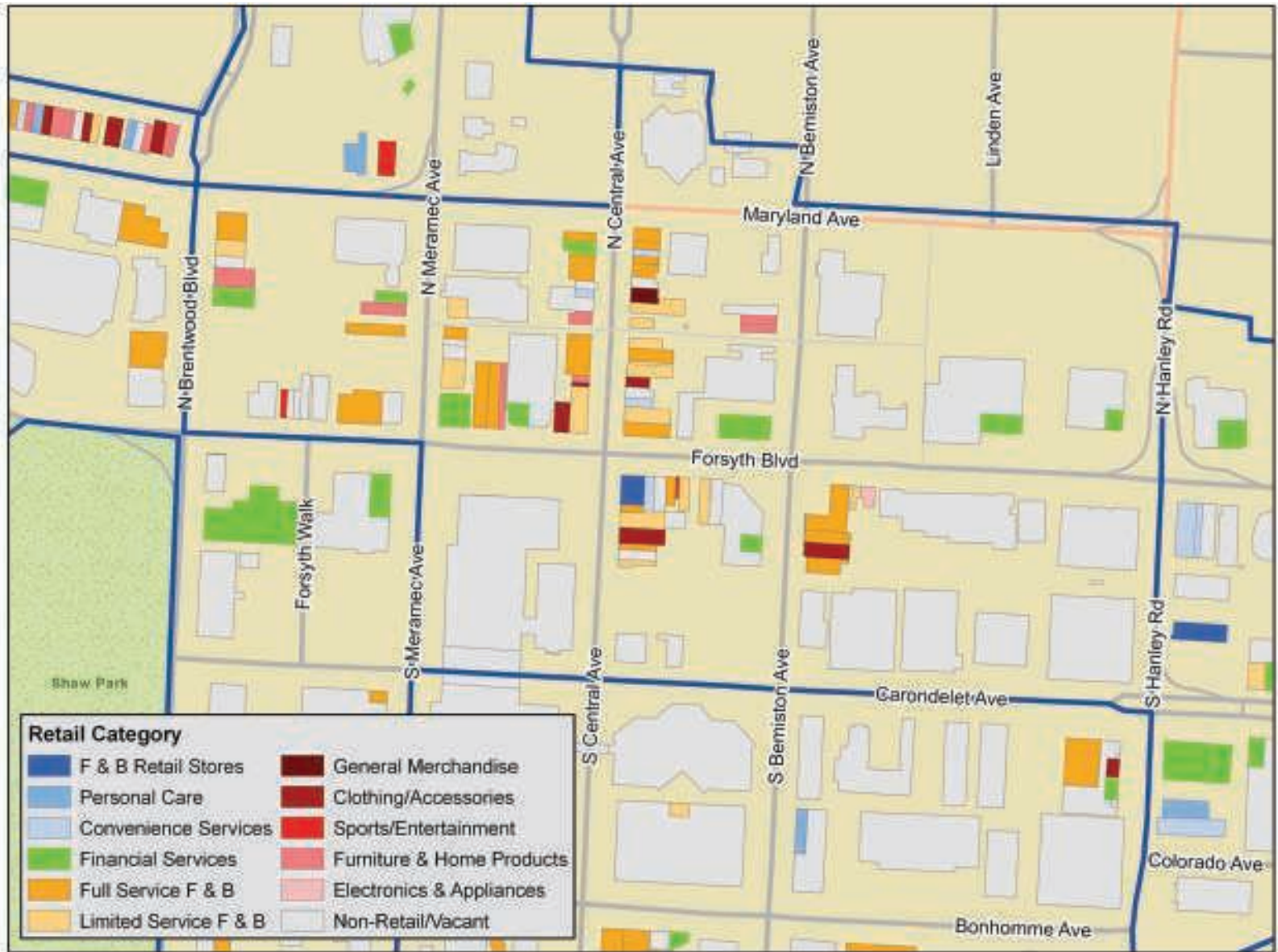




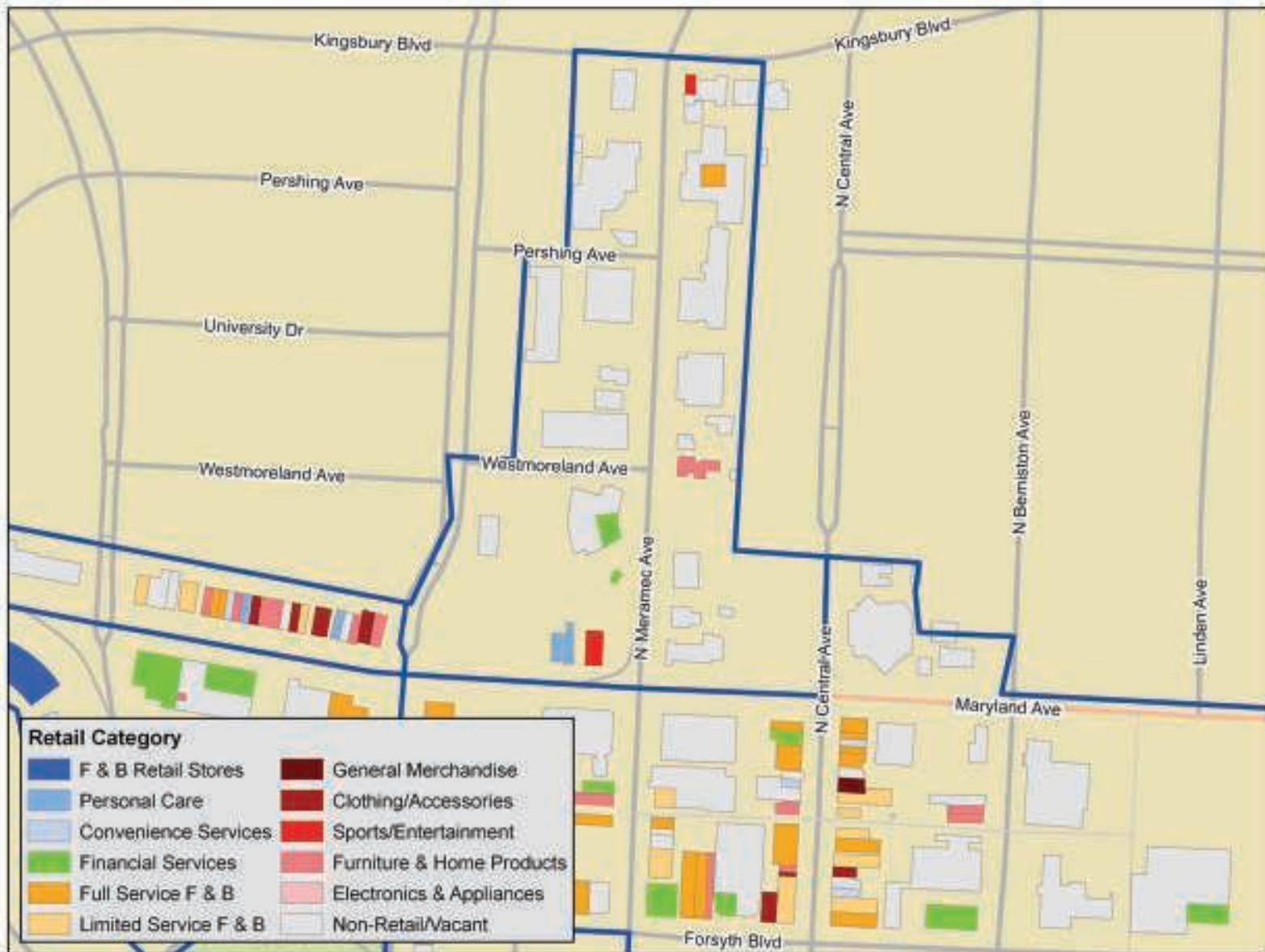
# Park View Retail



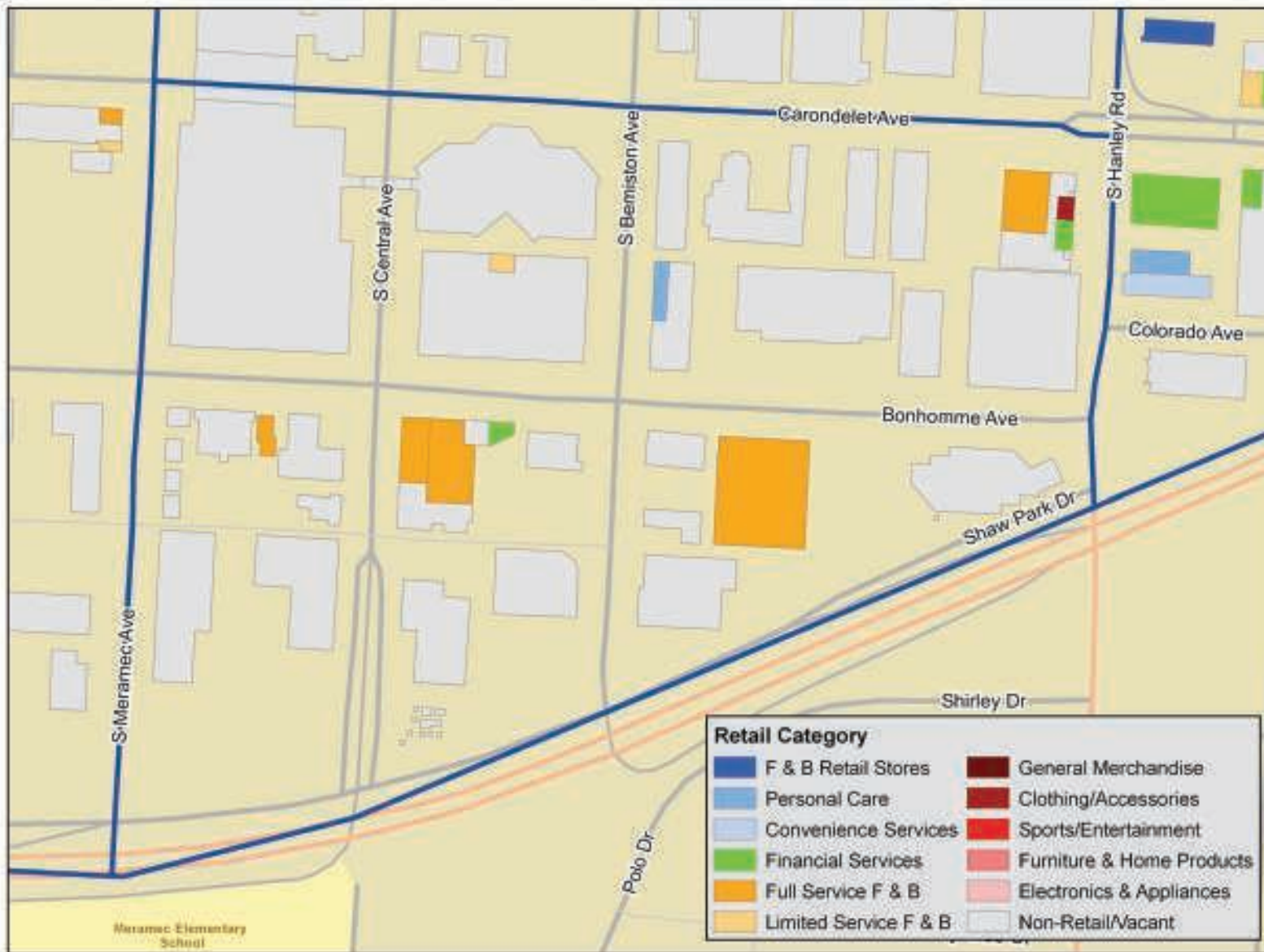
## North Central Retail



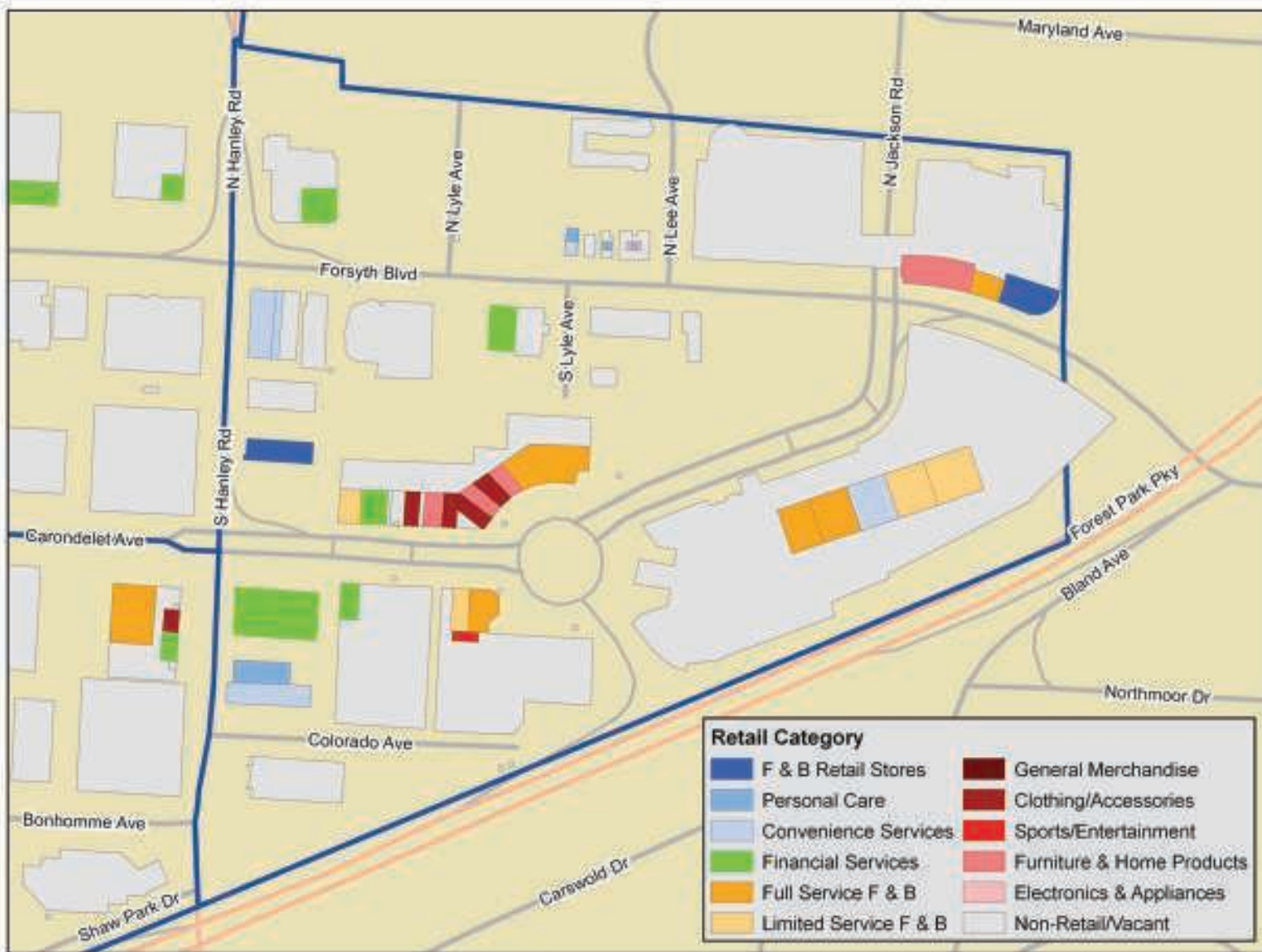
## Meramec Gateway Retail



# Central Retail



## East Village Retail





date **8 December 2009**

to **Clayton team**

from **Steve Wilson**

project name **Clayton CBD Master Plan**

project # **94425.00**

subject **Zoning Memo**

## **Downtown Clayton**

### **Summary of Zoning Regulations**

The areas included in Clayton CBD Master Plan study area contain nine base zoning districts, four overlay zones, eight planned unit developments, and one special development district. Combined these create a complex patchwork pattern of land-use regulations that allows, on the one hand, for a more nuanced response to individual development proposals; but on the other hand, creates a condition where the development controls are hard to predict. This summary highlights the intent and key requirements of each district.

The following list describes all the zoning categories located within the study area.

### **Basic Zones**

- "R-2" Single-Family Dwelling District
- "R-4" Low Density Multiple-Family Dwelling District
- "R-7" High Density Multiple-Family Dwelling District
- "C-1" Neighborhood Commercial District
- "C-2" General Commercial District
- "HDC" High Density Commercial District
- "S-1" Service District

### **Overlay Districts**

- Downtown Core Overlay
- CBD Core Overlay
- Clayton Plaza Overlay
- Central Station Overlay
- Forsyth Station Overlay
- "OD" Overlay District

### **Development Districts**

- "PUD" Planned Unit Development District
- "SDD" Special Development District

**BASIC ZONES- COMMERCIAL DISTRICTS <sup>1</sup>**

**HDC High Density Commercial District**

The High Density Commercial District is designed to accommodate high density office and commercial uses within the central business district. It does not allow for residential uses except for those that are a part of a mixed use development. This is the primary district for the CBD, extending from Brentwood Avenue to the Forsyth Station, and from Maryland Avenue to Forest Parkway.

**C-2 General Commercial District**

The "C-2" General Commercial District is designed to accommodate a variety of general commercial activities outside the Central Business District. The "C-2" Commercial District restricts the effects of intensification thereby maintaining the quality of life in established neighborhoods. The C-2 Districts are located along three of the primary approaches to the CBD including Maryland Avenue, Meramec Avenue, and the segment of Forsyth Boulevard east of N. Hanley Road.

**C-1 Neighborhood Commercial District**

The "C-1" Neighborhood Commercial District is the most restrictive commercial district intended to provide a variety of goods and services within a pedestrian friendly commercial environment, compatible to adjacent residential areas, thereby maintaining the quality of life in established neighborhoods. The C-1 District is located on the north side of Maryland Avenue and the southwest side of Forsyth Boulevard, west of Brentwood Boulevard.

**S-1 Service District**

The purpose of the "S-1" Service District is to provide a business environment conducive for economic growth. The City of Clayton accomplishes this goal through regulating the use of commercial property. The S-1 District is located west of the CBD on a thin sliver of land located between Gay Avenue and the western city boundary line.

<b>Allowable Commercial Uses</b>	<b>HDC</b>	<b>C-2</b>	<b>C-1</b>	<b>S-1</b>
Art gallery or studio.	P	P	P	P

---

<sup>1</sup> Section 405, Code of Ordinances of the City of Clayton



<b>Allowable Commercial Uses</b>	<b>HDC</b>	<b>C-2</b>	<b>C-1</b>	<b>S-1</b>
Bakeries	P	P	P	P
Banks and other financial institutions.	P	P	P	P
Dry cleaning and dyeing establishment.	P	P	P	P
Laundry shop	P	P	P	P
Medical or dental clinic.	P	P	P	P
Telephone exchange building.	P	P	P	P
Offices--business or professional	P	P	P	P
Parking lots and multi-level parking structures.	P	P	P	P
Pharmacies.	P	P	P	P
Place of religious worship.	P	P	P	P
Recreation building or structure or grounds.		P	P	P
Retail establishments.	P	P	P	P
Academy (including dancing, painting, theater, karate and similar disciplines).	C	C	C	C
Automobile agencies.	C	C	C	C
Banquet facilities.		C	C	
Car wash establishments.		C	C	C
Catering establishment.	C	C	C	C
Day care, preschool	C	C	C	C
Detached multi-unit housing/multiple structures on a single lot				
Drive-through establishments for financial institutions.		C	C	C
Drug rehabilitation facilities.				C
Funeral homes		C	C	
Gasoline and oil service stations		C	C	P
Grocery stores.	C	C	C	C
Health clubs		C	C	
Hospital			C	C
Hotel		C	C	C
Institution.		C	C	C
Lodge hall or club.		C	C	P
Microbreweries.		C	C	
Mixed-use buildings including residential		C	C	C
Nursery or greenhouse.				P
Nursing and convalescent home.		C	C	
Public buildings erected or used by the City, County, State or Federal Government.	C	C	C	C
Research or testing laboratory.				P
Restaurants (including carry-out, self-seating and full-service) and prepared food dispensing uses.	C	C	C	C
Schools for business, professional and technical training		C	C	C

<b>Allowable Commercial Uses</b>	<b>HDC</b>	<b>C-2</b>	<b>C-1</b>	<b>S-1</b>
Theaters, both live performance and movies.		C	C	C
Utility or utility station.	C	C	C	C

#### **Dimensional Requirements for Commercial Districts**

	<b>HDC</b>	<b>C-2</b>	<b>C-1</b>	<b>S-1</b>
Max Height	None	3 stories or 45'	2 stories or 35'	4 stories or 70'
Max Lot Coverage	60% of buildable area for buildings over 3 stories	-	-	-
Max FAR	3.0	-	-	-
Min Lot Width	50'	50'	50'	-
Minimum DU Size	5,000 sf single-family; 2,500 sf two-family; 750 sf multi-family	5,000 sf single-family; 2,500 sf two-family; 750 sf multi-family	-	-
Maxi Impervious Coverage	45% front yard setback, 55% total lot	45% front yard setback, 55% total lot	45% front yard setback, 55% total lot	-
Front Yard Setback*	10'	20% lot depth, min 30' up to 60'	30% lot depth, min 30' up to 60'	10'
Alternate Front Yard Setback	In line with average building frontage along the block	In line with average building frontage along the block	In line with average building frontage along the block	-
Rear Yard Setback	-	20% lot depth, min 30' up to 50'	30% lot depth, min 30' up to 50'	-
Side Yard Setback*	-	10% lot width, min 5' up to 15'	10% lot width, min 6' up to 15'	-

## RESIDENTIAL DISTRICTS <sup>2</sup>

### R-7 High Density Multiple Family Dwelling District

The "R-7" High Density Multiple-Family Dwelling District allows for the densest level of residential land use, and for non-residential land uses which provide services to the residential district on a conditional use permit basis. The R-7 District covers a half city block facing Shaw Park on the south west corner of the CBD

### R-4 Medium Density Multiple Family Dwelling District

The "R-4" Low Density Multiple-Family Dwelling District is intended to allow single-family, two-family and low density multi-family dwellings. This district also allows for non-residential land uses which provide services to the residential district on a conditional use permit basis.

### R-2 Single Family Dwelling District

The "R-2" Single-Family Dwelling District is intended to allow single-family residential use but at a slightly higher density than the "R-1" zoning district. This district also allows for non-residential land uses which provide services to the residential district on a conditional use permit basis. The R-2 areas within the CBD do not actually contain residential uses, but rather are used to limit land uses to public buildings and parks, including Shaw Park, Center Clayton, and Clayton High School.

Permitted Uses in Residential Districts	R-2	R-4	R-7
Group homes for the handicap	P	P	P
Home occupations	P	P	P
Parks and playgrounds.	P	P	P
Place of religious worship (minimum 1 acre parcel for new facilities)	P	P	P
Residential--single-family dwellings.	P	P	P
Residential--two-family dwellings.		P	P
Residential--multi-family dwellings.		P	P
Colleges and universities	C	C	C
Community buildings, recreation facilities, recreation fields	C	C	C

<sup>2</sup> Section 405, Code of Ordinances of the City of Clayton

<b>Permitted Uses in Residential Districts</b>	<b>R-2</b>	<b>R-4</b>	<b>R-7</b>
Day care, preschool	C	C	C
Detached multi-unit housing/multiple structures on a single lot		C	C
Lodge hall or club.		C	C
Medical or dental clinic.	C	C	
Parking lots and multi-level parking within 500 feet of any Commercial or Service District	C	C	C
Public and private elementary, middle and secondary schools	C	C	
Public buildings erected or used by any department of the City, County, State or Federal Government.	C	C	C
Restaurants (including carry-out, self-seating and full-service)			C

P= Permitted, C= Conditional Permit

#### **Dimensional Requirements for Residential Districts**

	<b>R-7</b>	<b>R-4</b>
Max Height	None	3 stories or 45'
Max Lot Coverage	60% of buildable area for buildings over 3 stories	-
Max FAR	4*	-
Min Lot Width	50'	50'
Minimum DU Size	5,000 sf single-family; 2,500 sf two-family; 750 sf multi-family	5,000 sf single-family; 2,500 sf two-family; 750 sf multi-family
Maxi Impervious Coverage	45% front yard setback, 55% total lot	45% front yard setback, 55% total lot
Front Yard Setback	25% lot depth, min 30' up to 60' **	20% lot depth, min 30' up to 60'
Alternate Front Yard Setback	In line with average building frontage along the block	In line with average building frontage along the block
Rear Yard Setback	25% lot depth, min 30' up to 50'	20% lot depth, min 30' up to 50'
Side Yard Setback	10% lot width, min 12' up to 20' **	10% lot width, min 5' up to 15'

\* R-7 Open Space Bonus. Where a portion of the buildable area is devoted to open space, additional floor area equal to eight (8) times the open space contained within the buildable area shall be permitted.

\*\* No off-street parking facilities will be allowed within required front and side yard areas except as provided by a conditional use permit.

**OVERLAY DISTRICTS**

Overlay zoning districts are adopted for specific areas to address subjects that require special treatment in light of historic and/or topographic features, existing land use circumstances within and near the district, geographical characteristics and/or sound zoning policies. They supersede or supplement, as applicable, the regulations of the base zoning districts. There are five overlay districts designated within the Central Business District.

**Central Business District Core Overlay District <sup>3</sup>**

The Central Business District Core Overlay District applies to selected blocks in the High Density Commercial District which have been targeted to remain pedestrian friendly retail centers. The area encompassed in the CBD Overlay District is the historic and current heart of commercial and service activities in the City of Clayton. The main reason for the continued vitality and integrity of the area is that the buildings in this area are "pedestrian friendly" structures and human in scale. The CBD Core Overlay District will preserve the ambience of this section of the Central Business District. The purpose of these regulations is to:

- Promote structures that have sidewalk frontage suitable for smaller retail and service activities;
- Stimulate designs that minimize scale and mass as perceived from the sidewalk;
- Avoid regimentation and visual uniformity along the sidewalk frontage;
- Encourage harmonious architecture which preserves the essential character of the district via variations in entrance size, setback, height, etc.; creation of varied sidewalk windows and display areas through the use of facade materials and design, which lend both visual and textural distinction.
- Design buildings to encourage pedestrian activity by use of ground level retail shops and store fronts.

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<sup>3</sup> Chapter 410: Overlay and Urban Design Zoning Districts, Code of Ordinances of the City of Clayton

***Dimensional Requirements***

- The maximum floor area ratio (FAR) is 1.5. The maximum floor areas may be modified subject to the provisions and requirements of the planned unit development process.
- The maximum allowable building height is 4 stories, not to exceed 45 feet.
- For buildings permitted to exceed the maximum height through the planned unit development process, a 10 foot step-back (upper story building setback) is required beginning at the third story level or 30 feet above grade, whichever is less.
- No front yard setback required.
- Rear yard setback is fifteen 15 feet.
- No side setback required except where a lot abuts a dwelling district, where least five feet shall is required. For buildings in excess of 2½ stories an additional 10 foot step-back (upper story building setback) shall be provided beginning at the third story level or thirty feet above grade, whichever is less.

***Parking Requirements***

Parking requirements are same as underlying zoning (HDC).

**Downtown Core Overlay Zoning District <sup>4</sup>**

Similar to the CBD Core Overlay Zoning District, the Downtown Core Overlay Zoning District is intended to maintain a "pedestrian friendly" setting, but allows for additional height with step-back provisions. In order to maintain this area as "pedestrian friendly", structures must be human in scale. Building mass, density and frontage variations should create a visually attractive and inviting streetscape within the urban context. The purpose of these regulations is to:

- Promote structures that have sidewalk frontage suitable for smaller retail and service activities;
- Stimulate designs that minimize scale and mass as perceived from the sidewalk;
- Avoid regimentation and visual uniformity along the sidewalk frontage;

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<sup>4</sup> Chapter 410: Overlay and Urban Design Zoning Districts, Code of Ordinances of the City of Clayton

- Encourage harmonious architecture, which preserves the essential character of the district by variations in entrance size, setback, height and the use of creative and varied sidewalk window and display; and
- Design buildings which use facade materials that are distinctive.

***Permitted Uses***

The uses permitted are the same as the base zoning district. All ground floor uses must be retail in nature, but may include personal care services, dry cleaning facilities, food and beverage service uses, consumer service offices (limited to financial institutions including banks, savings and loans and credit unions, real estate offices and travel agencies) or governmental offices within the district.

***Dimensional Requirements***

- The maximum floor area ratio (FAR) is 3.0. The maximum floor areas may be modified subject to the provisions and requirements of the planned unit development process.
- The maximum allowable building height is 7 stories, not to exceed 90 feet.
- No minimum front yard setback required.
- For buildings in excess of 2 ½ stories height, an additional 10 foot step-back (upper story building setback) is required at the third (3rd) story level or 30 feet above grade, whichever is less.
- Rear yard setback is fifteen feet.
- No side yard setbacks required except where a lot abuts a dwelling district, a side yard of at least 5 feet is required. For buildings in excess of 2½ stories but not exceeding four 4 stories in height, an additional 10 foot step-back is required beginning at the third story level or 30 feet above grade, whichever is less.

***Parking Requirements***

Parking requirements are same as underlying zoning (HDC).

### **Central Station and Forsyth Station TOD Overlay<sup>56</sup>**

The transit-oriented development (TOD) Overlay District is intended to encourage sustainable development by emphasizing public transit and pedestrian accessibility. This is done by reducing parking requirements in order to allow for more economically productive use of land—typically in the form of high-density, mixed-use development—in close proximity to MetroLink stations. Clayton has two TOD Overlay Districts: one at the Central Avenue MetroLink Station and another at the Forsyth MetroLink Station.

Key components include:

- Higher density development (no maximum FAR in most areas, some areas with minimum FAR).
- Flexible off-street parking requirements, depending on a professional parking study clearly demonstrating need levels.
- Relief of height restrictions while requiring building step-backs in some areas.
- Minimum front yard setbacks to encourage greater sidewalk widths.
- Absence of auto-focused land uses such as service stations and car washes.
- Expectation of green building certification, linkages between the development and the transit station, and green space/urban gathering areas.

### ***Permitted Uses***

The uses permitted are the same as the base zoning district, with the following restrictions to certain auto-related uses:

- Service stations (prohibited)
- Car washes (prohibited)
- Automobile agencies (conditional)
- Surface parking lots and garages without ground floor retail (conditional)

Within the Forsyth TOD Overlay District all buildings fronting Forsyth Boulevard or Hanley Road must contain first floor retail.

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<sup>5</sup> Board of Aldermen Meeting Minutes, The City Of Clayton, January 13, 2009

<sup>6</sup> Article XII.I Transit Oriented Development Overlay District--Central Avenue Station (Attachment A) and Article XII.II Transit Oriented Development Overlay District--Forsyth Station (Attachment B) in Chapter 410: Overlay and Urban Design Zoning Districts, Code of Ordinances of the City of Clayton



***Dimensional Requirements***

- Central Avenue Station:
  - No maximum building height.
  - No maximum FAR, except on east side of Brentwood Boulevard (underlying R-7 zone), where FAR must conform to base zoning.
  - Setback requirements are the same as for underlying zoning, except the front yard setback must be a minimum of 10 feet.
- Forsyth Station:
  - No maximum building height on south side of Forsyth Boulevard between Lyle Avenue and the eastern city limit. In the remainder of the district, height must be in compliance with base zoning regulations (unless modified by a SDD or PUD) and step-backs of tall buildings are encouraged.
  - Minimum FAR of 3.0 (and no maximum FAR) for areas on south side of Forsyth Boulevard between Lyle Avenue and eastern city limit. Areas along the north side of Forsyth Boulevard and the south side of Forsyth from Lyle to Hanley must conform to underlying zoning unless modified by a SDD or PUD.
  - Setback requirements are the same as for underlying zoning, except the front yard setback must be a minimum of 10 feet.

***Parking Requirements***

There are no minimum parking requirements for TOD Overlay Districts. Instead, requirements are at the discretion of the Plan Commission and the Board of Aldermen based on a professional parking study substantiating the developer's stated parking need.

**PUD AND SDD****Planned Unit Development <sup>7</sup>**

"The Planned Unit Development are a distinct zoning classification established to provide flexibility for unified land development by waiving certain zoning requirements in exchange for public benefit. Their intent is to encourage the efficient use of land resources and promote innovation in planning, and building. PUD's require that the applicant have control of the property and oftentimes requires a traffic study, shadow study, and conceptual review by the Plan Commission.

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<sup>7</sup> SECTION 405.1360, Code of Ordinances of the City of Clayton

**Residential** planned unit development is appropriate where a residential development project is proposed on a lot at least thirty thousand (30,000) square feet in size and is unable to meet the established zoning criteria due to unusual circumstances in size, configuration or particular design features. The planned unit development process provides the flexibility needed to encourage innovative medium and large-scale residential development that is consistent to neighborhood character.

**Commercial** planned unit development is appropriate where a proposed commercial development project exceeds fifty thousand (50,000) square feet in size and is unable to meet the established zoning criteria due to unusual circumstances in size, configuration or particular design features. Commercial planned unit developments are intended to encourage the efficient use of land and resources, promoting greater efficiency in public and utility services, encouraging innovation in the planning and building of all types of development."

For example, the Crescent Project, as a part of the Clayton Plaza Overlay, was required to secure a PUD in order to increase their allowable floor area ratio, from 3.0 to 3.36. In exchange, it requires a mix of residential and retail uses, a limit of 72 condominium units and 26,000 square feet of retail, and the building was limited to nine stories and 390,000 sf.

#### **Special Development District**

The special development district is a zoning amendment intended to provide a method of consideration for a multi-phased development in a unified land plan that will improve the quality of the subject properties and have a beneficial effect on adjacent areas. It requires the submittal of a Special Development Plan that describes the various components of the project and its phasing.

The SDD allows for the waivers of certain requirements of the zoning regulations in exchange for certain public benefits such as extraordinary landscaping, architectural distinction and significance, extensive use of high quality building materials that would add significant value to the property and benefit adjacent properties, provision of new public infrastructure, provisions for affordable housing, and LEED certification from the U.S. Green Building Council.

In 2001, the City approved a comprehensive amendment to the Zoning Ordinance that eliminated the SDD and substituted the PUD, but then reinstated in 2008 to better accommodate large multi-phased projects. As part of the ruling, the Centene Plaza SDD, was approved, and is currently the only SDD project designated in the CBD. Due to market conditions, the applicant is requesting the City consider a range of height and square footage between 17 stories (263 feet in height) and 21 stories (313 feet in height) and an adjustment in parking for the structure to correlate with the final height and square footage, but not less than 852 spaces.<sup>8</sup>

OFF-STREET PARKING REQUIREMENTS- ALL DISTRICTS <sup>9</sup>	
Multiple Family Dwellings*	2 sp /unit
School **	2 sp /classroom
Hospital/ Nursing home **	1 sp /4 beds
Auditoriums, sports arenas, churches or temples **	1 sp /5 seats
Theaters **	1 sp /4 seats
Community center, library, museum **	1 sp / 300 gsf [3.3 sp/ 1000 gsf]
Hotel or motel **	.75 sp /room (plus required parking for other commercial uses)
Medical office buildings **	1 sp /200 gsf [5 sp /1,000 gsf]
Commercial, business, office, service and industrial buildings **	1 sp /300 gsf [3.3 sp/ 1,000 gsf]
Mixed-use developments **	Sum of requirements for various use or based on traffic study
Restaurants **	
Restaurants located in CBD, < 3,000 gsf excluding storage	Off-street exempt
Restaurants > 3,000 gsf excluding storage	.6 sp /seat on pro-rated % percent for increment above 3,000 gsf [ranges from approximately 4-10 sp/ 1,000 gsf]
Cafeterias in office buildings	Off-street exempt
Restaurants located in office	Expanded restaurant area allowed after 6 PM and on

<sup>8</sup> City of Clayton, Board of Alderman Meeting Minutes, September 7, 2005

<sup>9</sup> SECTION 405.3620: Off-Street Parking Requirements, Code of Ordinances of the City of Clayton (Edited for the sake of brevity.)

OFF-STREET PARKING REQUIREMENTS- ALL DISTRICTS <sup>9</sup>	
buildings < 150,000 gsf	weekends. Use .6 sp /seat for available spaces on-site or leased within 500'
Restaurants located in office buildings > 150,000 gsf	Off-street exempt
Restaurants located in hotels	Off-street exempt

\* Residential parking must be located on-site.

\*\* Parking for all other uses can be located within 500' walking distance of building.

LOADING REQUIREMENTS - ON-SITE <sup>10</sup> (Edited for the sake of brevity.)	
Retail and Service	1 sp / first 10,000 gsf + 1 sp / next 15,000 gsf + 1 sp / next 40,000 gsf
Office	1 sp / first 10,000 gsf + 1 sp / next 50,000 gsf; maximum 5 sp required
Hotel	2 sp /first 100 rooms + 1 sp / next 100 rooms; maximum 4 sp required

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<sup>10</sup> SECTION 405.3660: Loading Requirements, Code of Ordinances of the City of Clayton