

2. PRESENTATIONS

CLAYTON CBD MASTER PLAN UPDATE AND RETAIL STRATEGY



The CBD needs to evolve with demographic trends and market demands to stay competitive.

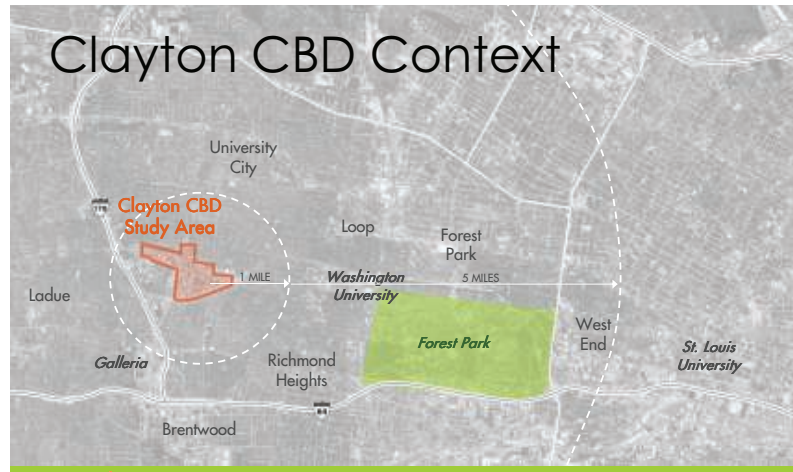
Agenda

- CBD Goals and Context
- CBD Analysis
 - Market Conditions
 - Urban Design Conditions
- CBD Concepts / Urban Design Ideas
- Discussion
- Next Steps

Goals of the plan

- 1 Implement Vision 2013 goals
- 2 Anticipate future development
- 3 Create a retail and marketing plan
- 4 Update 1993 CBD Master Plan

Clayton CBD Context



What is Clayton CBD...

- 35,000 people are employed in the CBD
- 16,500 people live within a mile of downtown Clayton, population size is stable (2000 census, projected through 2012)
- 318,000 people live within five miles, population is shrinking (2000 census, projected through 2012)

Year	Pop. (1 mile)	Pop. (5 miles)
1990 (census)	15,450	353,014
2000 (census)	16,299	324,111
2007 (estimate)	16,446	317,961
2012 (projection)	16,331	312,452

- Population is highly educated 34% of adults have a bachelor's degree; an additional 36% of adults also have an advanced degree (2007)
- Population is primarily employed in white collar jobs 24% employed in management, business and financial services; 45% in professional services, 22% in sales and offices (2007)

What we heard...

RETAIL:

- **Over supply** of retail in the County.
- **Competition** with destination malls and "Big Box" sites.
- Is **fragmented**, spread out and lacks clear image (not a retail destination).
- CBD is a **strong dining** destination.
- Many retail spaces not well suited for contemporary demands.
- Too many banks at street level.

What we heard...

RESIDENTIAL:

- Opportunity for **market rate multi-family rental** housing for entry level professionals.
- Opportunity for **empty nester** and senior housing.
- **Amenities** include MetroLink, Shaw Park, dining venues, great schools and public services.
- High **land cost**, limited **parcel availability**, and lack of **public incentives** are rental housing constraints.

What we heard...

OFFICE:

- Strong **office and corporate location** and market (public & private)
- High office rents and land values; low vacancy rates.
- **Difficult to assemble sites** suitable for 23,000-27,000 gsf floorplates.
- Required street level retail may be **counterproductive** to CBD retail concentration strategy.

HOSPITALITY:

- Established hospitality destination

What we heard...

STREETScape:

- Many wide, auto-oriented streets that are **not pedestrian friendly**.
- Many sidewalks are narrow and do not support pedestrian activities and outdoor dining.
- **Lack of iconic small-scale civic space**.
- Unfriendly pedestrian connections to Shaw Park (across S. Brentwood).

What we heard...

TRAFFIC & PARKING:

- Existing **street grid** distributes traffic well.
- Short "rush hour"; satisfactory AM/PM peak hour level of service.
- Off-street parking is **well supplied**; on-street parking in high demand.
- Off-street parking can be difficult to find and is not "shared".
- **MetroLink is underutilized**.
- Late evening "flashing" traffic lights inconsistent with urban image.
- Hanley/Forsyth and Brentwood/Forsyth "free right turns" are unnecessary.

What we heard...

ZONING:

- Complex, "patchwork" zoning, with too many zones and districts: 9 base districts, 4 overlay districts, 8 PUDs and 1 Special District.
- Need to refine dimensional and transitional density standards

CBD/NEIGHBORHOODS:

- Strong neighborhoods that resist tall buildings at edge of CBD.
- Strong school system that requires financial resources.

Retail Market Demand

Demand Analysis Process

- Identify sources of demand—"markets"
- Assess spending potential of markets by retail category and store type
- Determine the portion of this spending that could potentially be spent in the CBD "capture rate"
- Use average retail productivities (sales/sf) to estimate the amount of supportable sf.
- Assess demand for major retail store types:
 - Convenience—Food and Beverage Stores & Drug/Personal Care Stores
 - Shoppers Goods—General Merchandise, Apparel, Sporting Goods, Hobby, Book, & Music Stores, Furniture/Home Furnishings, Electronics, Miscellaneous
 - Eating and Drinking—Quick Service and Full Service Restaurants

Retail Market Demand

Sources of Demand

Sources of demand= those who could potentially shop and dine in the CBD

- Area Residents
- CBD Visitors—overnight hotel guests and visiting friends and family
- CBD Employees
- Others from outside these markets ("Inflow" markets)

Retail Market Demand

Resident Markets

- "Primary Trade Area"—CBD
- "Secondary Trade Area": 0-3 mi. radius net of CBD
- "Tertiary Trade Area": 3-5 mi radius



Retail Market Demand

Resident Expenditures

- Data on expenditure by category by ESRI (data service), filtered through expenditure by store data by the Economic Census.

	Primary (\$Millions)	Secondary (\$Millions)	Tertiary (\$Millions)
Food & beverage stores	2.94	261.25	370.09
Health & personal care stores	0.49	41.71	60.77
Subtotal: Convenience	3.43	302.96	430.86
General merchandise stores	2.40	213.32	299.67
Clothing & clothing accessories stores	1.15	103.22	142.55
Sporting goods, hobby, book, & music stores	0.31	27.68	38.68
Furniture & home furnishings stores	0.39	34.42	46.98
Electronics & appliance stores	0.50	44.48	62.22
Miscellaneous store retailers	0.21	18.60	26.01
Subtotal Shoppers Goods	4.94	441.73	616.10
Full Service	1.19	107.62	280.45
Limited Service	0.89	79.90	111.63
Subtotal Food and Beverage	2.08	187.52	392.08
Total	10.45	932.21	1,439.05

Retail Market Demand

Other Markets

- Visitors
 - Hotel visitors=(841 CBD rooms * est. 60% occupancy * 365 days/yr *1.5 (persons/room)) / 2.5 days/visitor = 111,000 visitors
 - Visiting family and friends (VFR's) = 1 person per Clayton resident = 15,246 per year
 - Estimated 126,250 visitors annually to CBD
- Office workers
 - City of Clayton estimates 35,000 employees in CBD

Retail Market Demand

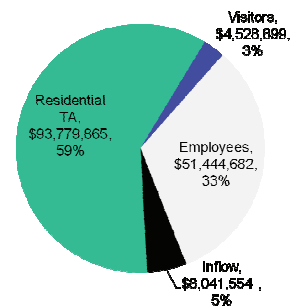
Other Markets

- Visitors spend approx. \$20 M total, \$159 average per visitor on defined retail categories (based on adjusted statewide averages)
- 35,000 employees spend a total of \$63.4 M annually on the retail categories (based on averages from the ICSC)

Retail Market Demand

Capture

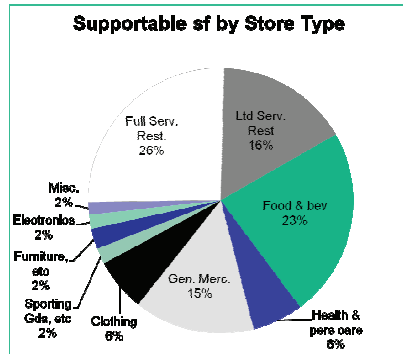
- Capture rate varies by market and retail type
- Total of \$157.8 million in potential captured spending
- Residential market is makes up approx. 2/3rds of support



Retail Market Demand

Supportable sf

- Sales/sf productivity rates range from \$250 to \$600, depending on store type
- Total potential sales divided by sales productivity levels equal supportable sf range
- Total supportable: 346,000- 410,000 sf (vs. 364,500 existing retail sf w/o banks)



Downtown Retail Inventory

- Inventory completed by AECOM Economics in December, 2010
- 159 Total Retail Businesses (including Banks and Financial Svcs)
- 463, 250 sf (±) in all Categories of Occupied Space (including banks and financial services)
- Without financial services (21% of total space), the total amount of retail in downtown Clayton is 364,520 (±) sf
- Estimated 1,980 sf of vacant retail space in December 2009

Downtown Inventory

- Four Categories/Eleven Subcategories of Occupied Retail Space:
 - **Convenience Retail** – Grocery Stores, Food and Beverage Stores
 - **Convenience Retail** – Personal Care
 - **Convenience Retail** – Convenience-based Consumer Services
 - **Banks and Financial Services**
 - **Food & Beverage** – Full-service
 - **Food & Beverage** – Limited Service
 - **Specialty Retail** – General Merchandise
 - **Specialty Retail** – Clothing and Accessories
 - **Specialty Retail** – Furniture and Home Accessories
 - **Specialty Retail** – Miscellaneous Retail

Downtown Retail Inventory

- Retail Clusters along Maryland Avenue and at Central Avenue & Forsyth, and in new development along Carondelet at the Circle.
- Other retail is scattered throughout downtown Clayton in stand-alone commercial structures, as part of Mixed-Use and commercial strips

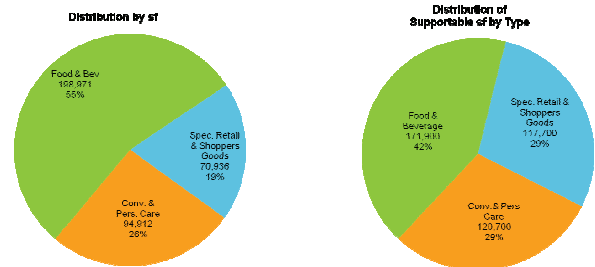


Market Conclusions

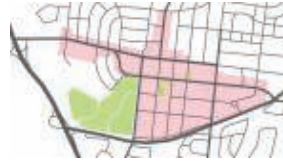
- In 2014, Downtown Clayton is projected to have unmet market demand supporting an additional 13,500 to 45,500 sf of retail space in addition to existing retail (not including sf of banks and financial institutions)
- The total supportable could be considered 'conservative', as "investment-grade" retail sales productivity levels were used
- The supply vs. unmet demand by category is illustrated on the chart which follows
- While there is 'theoretically' more F & B than the base markets 'support', this is a major attraction to downtown Clayton, and can be increased if average required sales productivities are slightly reduced. F & B is also a powerful attractor of **inflow markets**. Both specialty and convenience retail categories can support additional sf and stores

Existing vs. Supportable sf

Comparison of Existing retail supply (on left) vs. Supportable sf (on right)

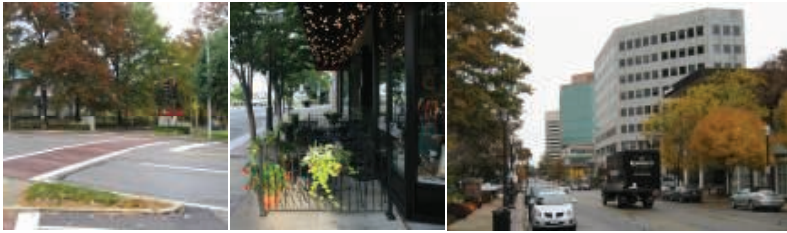


CBD Analysis

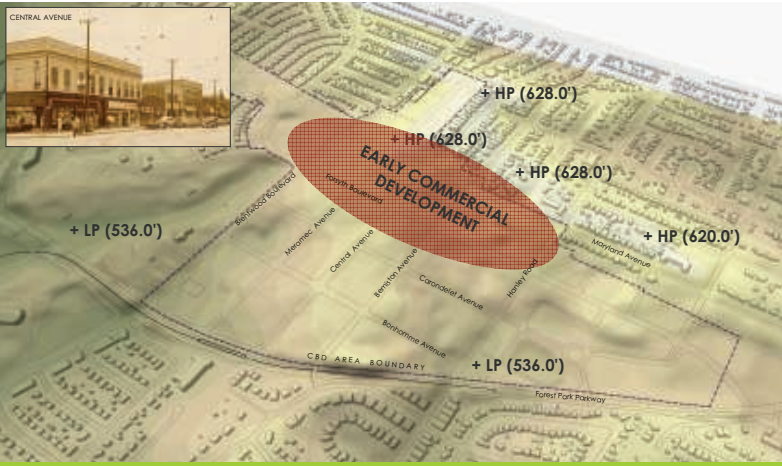


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Topography



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Topography



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Connections to Neighborhoods and Street Grid



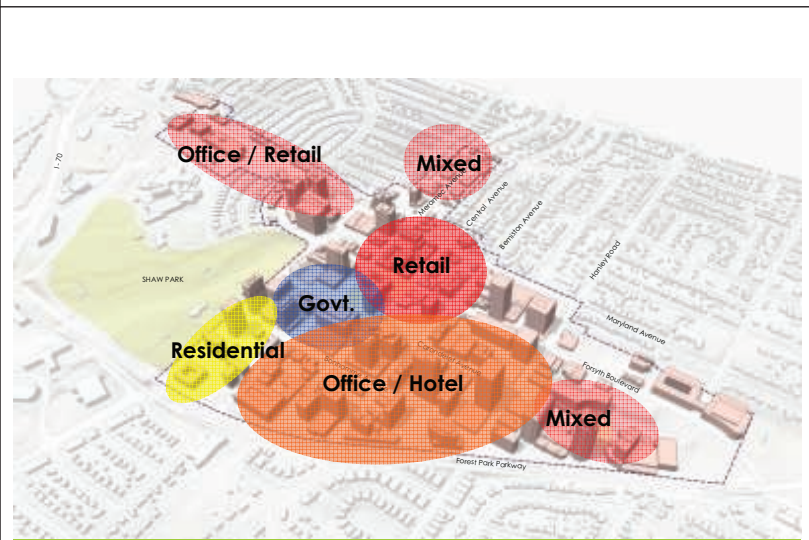
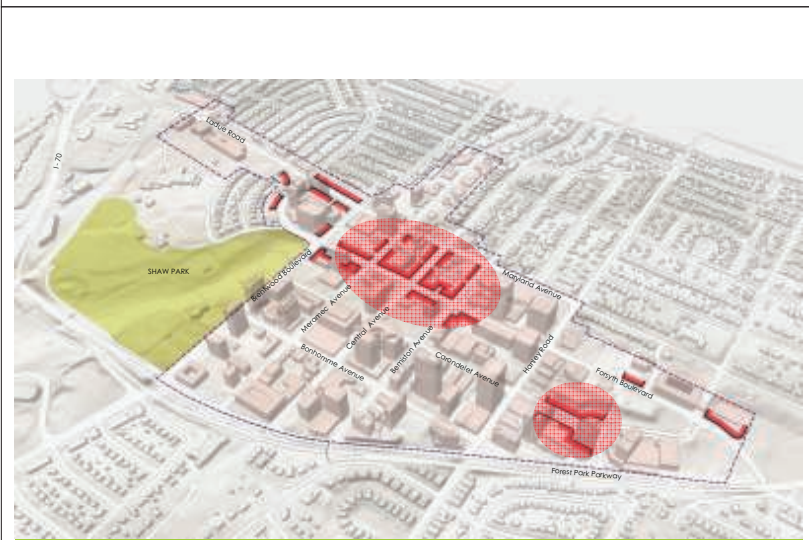
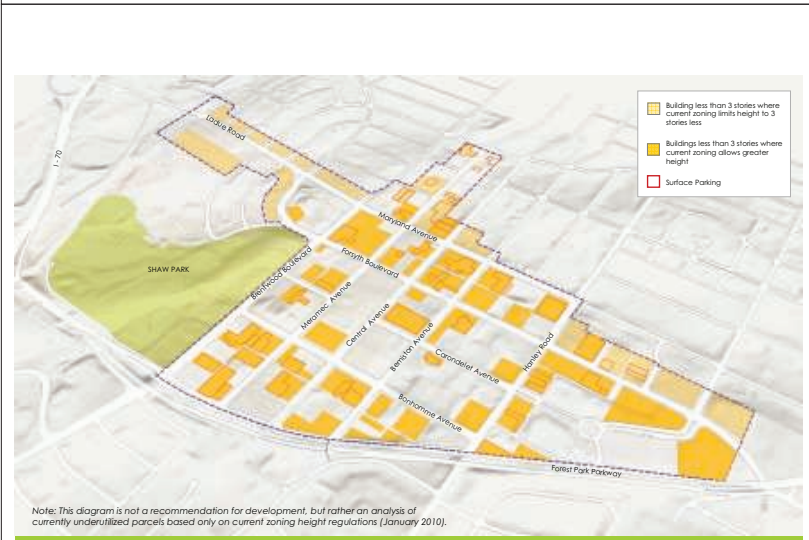
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Access from Surrounding Communities



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Public Parking Access

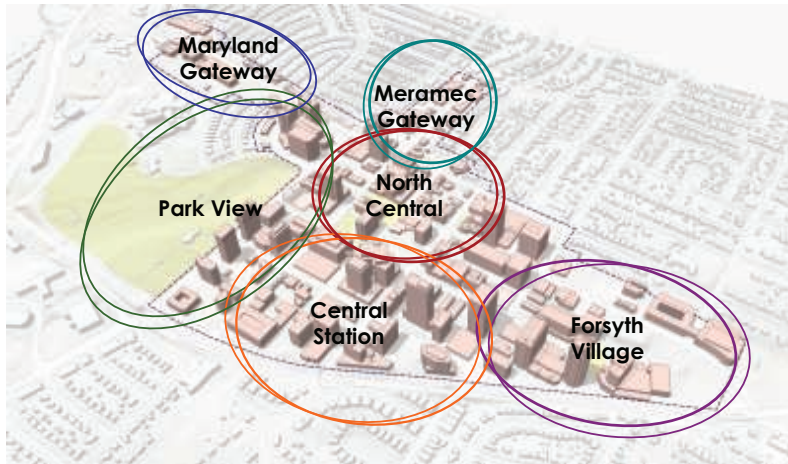


Downtown Clayton Inventory

Summary by Subdistrict

District Name	Businesses	Total Retail SF w/ Banks	Total Retail SF w/o Banks	% of Total SF	% of Total Retail (w/o Banks)
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 Station	11	67,687	64,021	14.61%	17.56%
Forsyth Village	37	103,749	83,658	22.40%	22.95%
Total	159	463,256	364,519	100.00%	100.00%

Source: AECOM Economics



NORTH CENTRAL



- Largest concentration of retail and food service, 1/3 of entire CBD
- Strong restaurant and bar focus creates evening destination cluster
- Bank/financial institution cluster is largest in CBD (12)



NORTH CENTRAL



- Grow at a **pedestrian scale**, with fine-grained development, **active streets** and **walkable commercial** areas.
- Preserve established **restaurant** cluster.
- Create **civic place** for focus, identity and events.
- Promote **infill** development at appropriate scale.



NORTH CENTRAL



NORTH CENTRAL



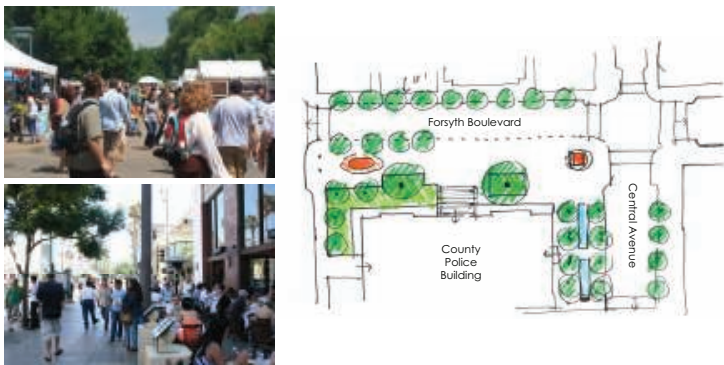
NORTH CENTRAL – Central Avenue Existing Conditions



NORTH CENTRAL – Central Avenue Proposed Conditions



NORTH CENTRAL – Proposed Plaza



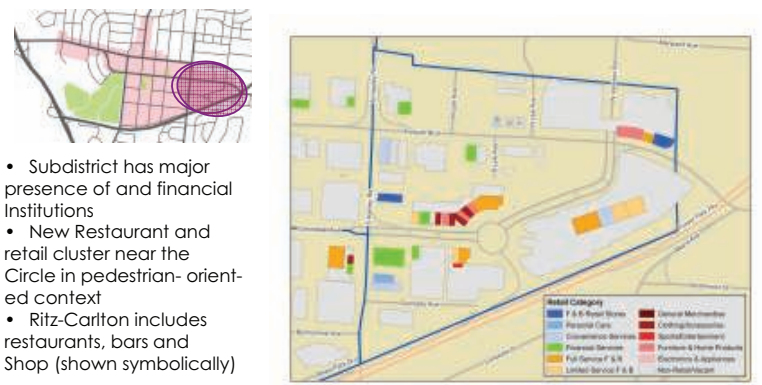
NORTH CENTRAL – Proposed Plaza



NORTH CENTRAL



FORSYTH VILLAGE

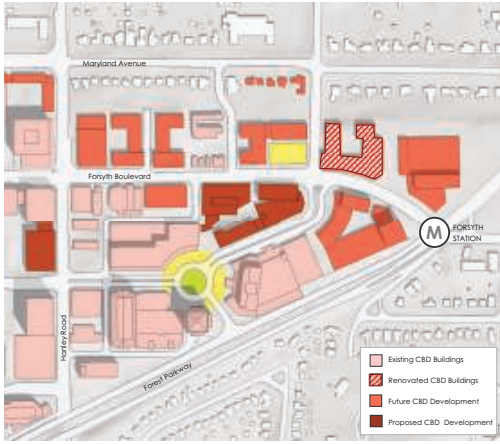


- Subdistrict has major presence of and financial Institutions
- New Restaurant and retail cluster near the Circle in pedestrian-oriented context
- Ritz-Carlton includes restaurants, bars and Shop (shown symbolically)

FORSYTH VILLAGE



- Build on established **retail** and **office** developments.
- Take advantage of adjacent **transit station**.
- Anchor the **eastern gateway** to the Clayton CBD.



FORSYTH VILLAGE



FORSYTH VILLAGE



FORSYTH VILLAGE



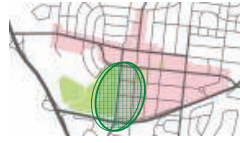
PARK VIEW



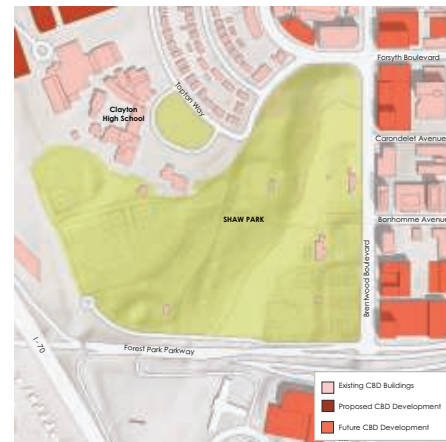
- Limited retail presence in this sub-district (5 banks & financial institutions, a few restaurants and consumer services)
- Straub's is the largest specialty food business in the study area
- Terrain and buildings are impediments to retail infill



PARK VIEW



- Update park for broader range of activities.
- Activate park by introducing **kiosks, cafes** and small **restaurants**.
- Create space for **festivals and large events**.
- Allow **taller buildings** to take advantage of **views** across Shaw Park.



PARK VIEW



Millennium Park, Chicago



Central Park, New York



Schenley Plaza, Pittsburgh



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Park View: Existing Conditions



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Park View: Proposed Conditions



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Park View: Future Conditions

PARK VIEW



Bryant Park, NY



Philadelphia, PA



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PARK VIEW



Addison, TX



Millennium Park, Chicago



Schenley Plaza, Pittsburgh



Bryant Park, New York



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CENTRAL STATION



- Office and government Uses are dominant; little retail presence apparent in this sub-district
- Large catering space in Sheraton Hotel shown symbolically

CENTRAL STATION



- Encourage **transit-oriented development** around the Clayton **MetroLink** station.
- Increase nighttime and weekend activity by adding **infill housing**.
- Redevelopment of **office**, small scale park spaces, improved streetscape.

CENTRAL STATION



CENTRAL STATION



CENTRAL STATION



MARYLAND GATEWAY



- Includes service cluster at edge of study area and Maryland Avenue shopping Block
- Combination of casual dining, specialty retail, personal services and two vacancies

MARYLAND GATEWAY



- Extend **urban** character along Maryland Ave.
- Maintain small **retail** establishments along **street edge**.
- Mix **housing and retail** to smooth **transition** to residential areas.



MARYLAND GATEWAY



MARYLAND GATEWAY - existing



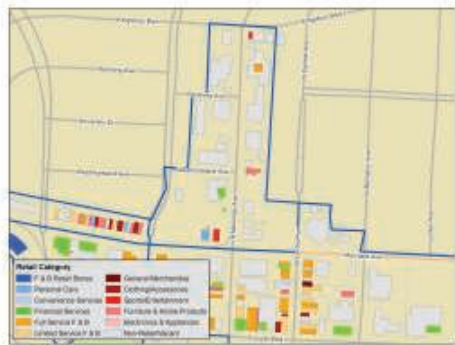
MARYLAND GATEWAY - proposed



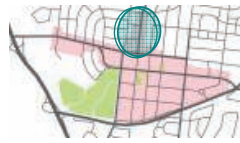
MERAMEC GATEWAY



- Limited retail offerings along Meramec Avenue
- Restaurant in Daniele Hotel shown symbolically
- Multiple infill opportunities
- Retail presence not really apparent until cross Maryland Avenue



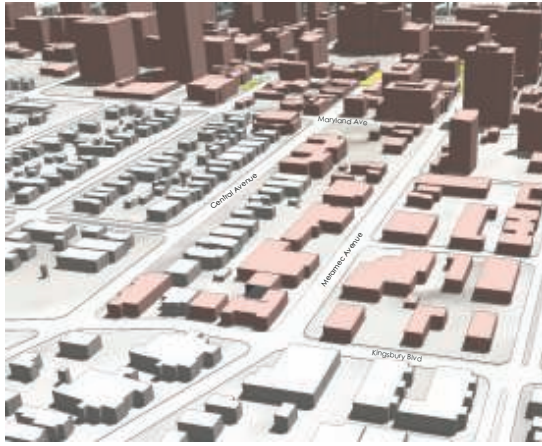
MERAMEC GATEWAY



- **Infill** development with **mixed use** and **housing** for young professionals.
- Create sense of arrival and downtown **identity**.

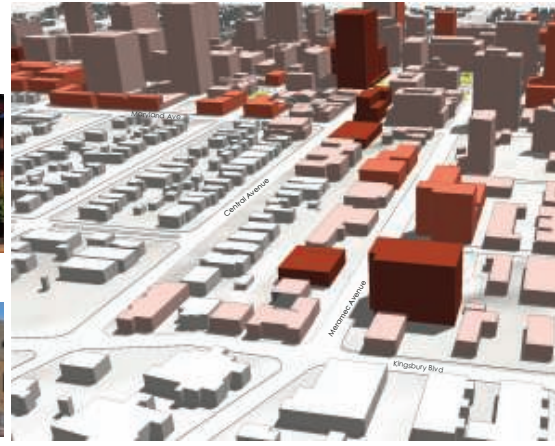


MERAMEC GATEWAY



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MERAMEC GATEWAY



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IDENTITY & WAYFINDING



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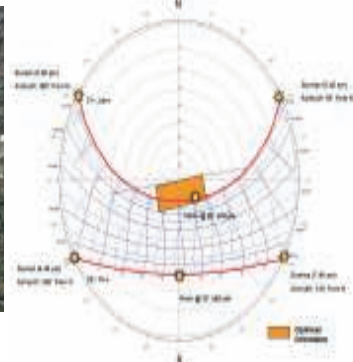
Gateways to the CBD

IDENTITY & WAYFINDING



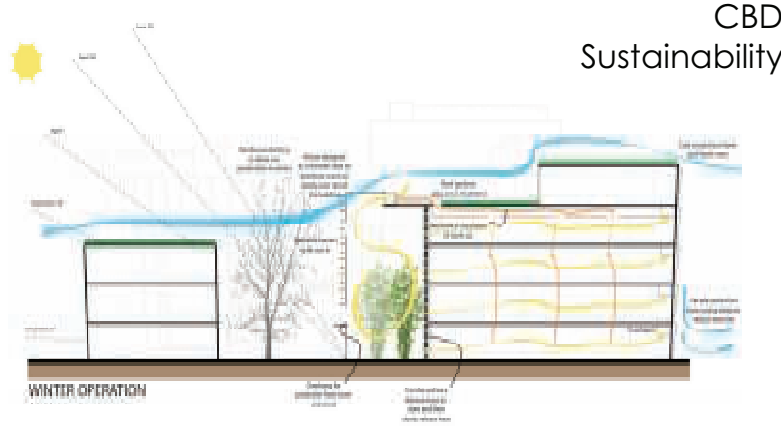
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Clayton CBD Sustainability



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CBD Sustainability



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CBD Sustainability



CBD Sustainability



Green Roof in Boston, Ma

Clayton 2010



Clayton 2020



Clayton 2020



Table Discussion

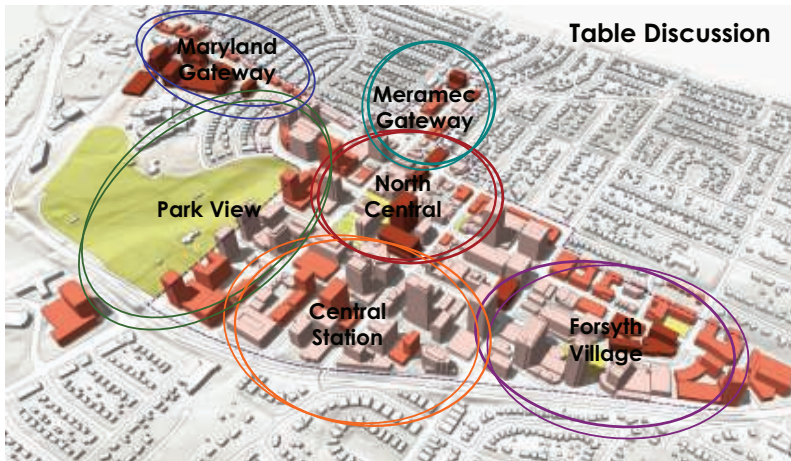


Table Discussion

For each of the 6 Districts:

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