



# CLAYTON TOMORROW 2040

Plan Commission adoption Resolution passed June 3, 2024  
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## EXISTING CONDITIONS REPORT

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City of Clayton Comprehensive Plan

# CONTENTS

## INTRODUCTION

Introduction

Past Plan Review

## EXISTING CONDITIONS

Demographics

Land Use

Residential

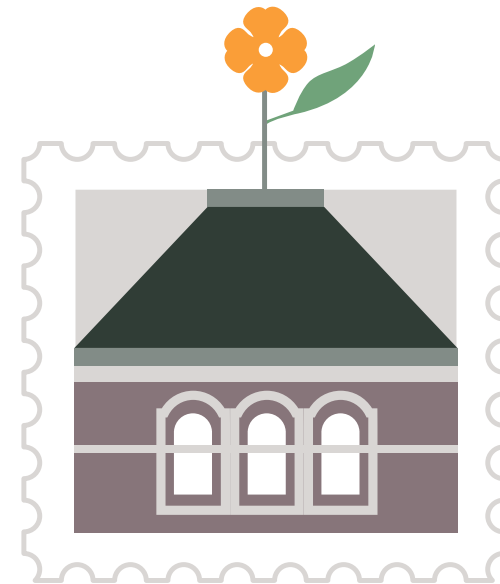
Commercial

Greenspace & the Environment

Institutional

Parking

Transportation



# CLAYTON TOMORROW 2040



# INTRODUCTION

## About the City

Clayton is an inner-ring suburb located just west of the City of St. Louis and is the seat of government for St. Louis County. The community is bounded by University City to the north, Ladue to the west, Richmond Heights to the south, and the City of St. Louis to the east. Interstate 170 runs through the western portion of the community. Other major roadways include principal arterials Forest Park Parkway, Hanley Road, and Brentwood Boulevard, and Big Bend Boulevard and Forsyth Boulevard, considered minor arterials. The City is located in the Central Corridor of St. Louis County and includes a robust Downtown that is a regional job center. Discussed further in this analysis, the City also includes several additional commercial nodes, ranging from small-scale neighborhood commercial on DeMun to large-scale commercial activity in Downtown. Land in the community is highly desirable due to the quality of housing, highly ranked school district, and regional proximity. Measuring just 2.5 square miles in land area, the City is considered a small-sized municipality in the St. Louis region, home to just over 17,000 residents. That being said, the services and amenities in the City rank highly and provide services, jobs, and amenities to the broader region.

For the purposes of this work, many of the statistics regarding Clayton have been compared to the adjacent 5-counties including St. Louis City, St. Louis County, St. Charles County, Jefferson County, and Franklin County, collectively referred to as the 5-County Region.

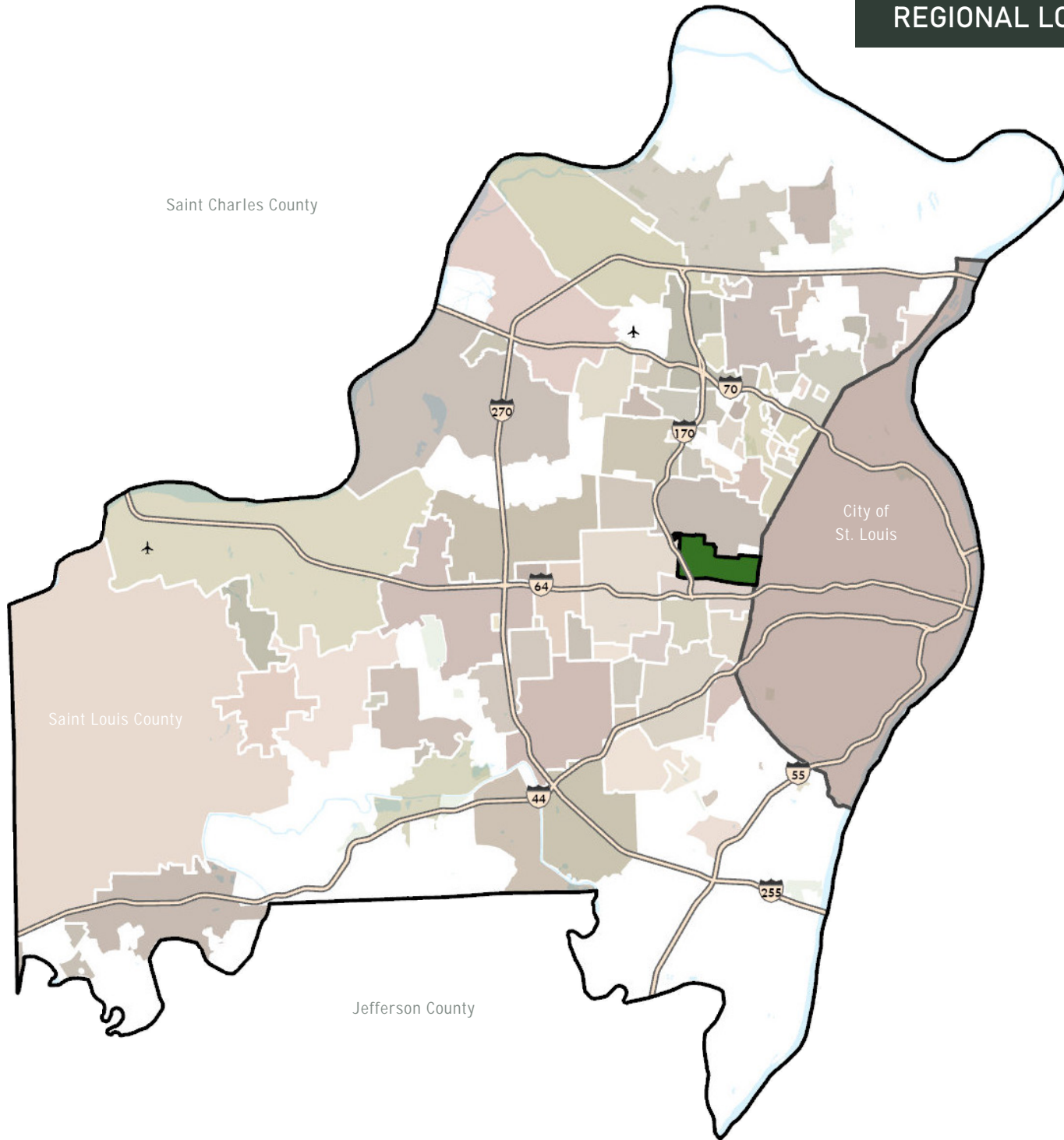
## Purpose of the Report

The Community Analysis report provides a review of baseline information about the City of Clayton. The review of the City's land uses, residential and commercial market, and community assets provides insight into the overall health of the City and will set the stage for the rest of the Comprehensive Plan process.

## City History

The City of Clayton was formally incorporated in 1913 by an approval of voters. In the two decades prior to its incorporation, population began moving west, out of the City of St. Louis, for more space and new housing. Clayton's open land and proximity to the City made it an attractive place for new residents. Between 1920 and 1935, the City grew rapidly, and significant development began. Clayton transitioned from a sleepy suburb of the City to a booming area with thousands of residents and a growing business environment. At this point, the Central Business District was established, and Downtown Clayton began its development. The City has continued to grow and today is a fully built-out community surrounded by adjacent municipalities.





# EXISTING PLANS

## 1958 Master Plan

The 1958 Master Plan for the City of Clayton was produced by Harland Bartholomew and Associates, one of the leading authorities on city planning in the mid-twentieth century. Harland Bartholomew was the first full-time planner employed by a US city and went on to have a thriving consulting practice.

The 1958 Master Plan identifies the City as primarily residential in nature, though acknowledges that the community has a central business district that is substantially larger than typical for its population and land area. The importance of county growth is noted, as Clayton is the county-seat.

The plan establishes the following principles:

- *The residential character of the City must be preserved, with no material change in population densities;*
- *Sound development of the central business district should be encouraged within the area heretofore zoned for that purpose;*
- *An adequate major street system is necessary in order to expedite traffic flow and to reduce a minimum vehicular movements through residential areas;*
- *Bypass routes are essential around the City and around the central business district;*
- *Additional parking facilities are necessary to maintain the health of the central business district in competition with other shopping center developments;*

- *Physical improvements should be so planned as to protect and preserve the greatest measure of usefulness of the fine educational institutions and recreation facilities within the City;*
- *Coordination of the planning proposals of adjacent municipalities is essential to a successful program of accomplishment; and*
- *Zoning regulations of the City, although now reasonably modern, should conform to the best current standards and terminology so as to promote orderly growth and development under simple administrative and enforcement procedures.*

The plan acknowledges the presence of transit, but defers to the importance of automobiles.

*“Even though Clayton has better transit service than most local suburban communities, it is used by comparatively few customers. The transit study being conducted by the Metropolitan Committee should indicate methods of improving local transit service, but it will probably be many years before any substantial relief is afforded. Consequently, this’ study must be primarily based upon access by autos.” (pg. 42)*

Consequently, there is significant discussion of traffic and parking concerns. As is consistent with the time of production, there was no public engagement conducted as part of this planning process.



### 1967 Revised Central Area Plan

Also prepared by Harland Bartholomew and Associates, the 1967 Revised Central Area Plan focuses on the Central Business District of Clayton. This plan has two major objectives:

- *To provide a new heart for Clayton in the area around the Courthouse by a two-level arrangement of streets and parking areas and a new complex of public and private buildings, tentatively called the “County Plaza” in this report.*
- *To provide for the needed traffic capacity by fully utilizing the existing streets, this is to be accomplished by: a system of synchronized, computer directed, traffic signals, one-way operation of the majority of the streets, and a few strategically located street improvements.*

The plan also calls for the creation of a large two-level pedestrian plazas that would connect a variety of buildings in the area between Maryland Avenue and Carondelet Avenue and between Meramec Avenue and Central Avenue.

Unlike the 1958 plan, this plan did engage the public through a series of surveys. A questionnaire was sent to Clayton-based employees. In addition, a postcard survey was sent to customers of the Downtown area and interviews of visitors were conducted at the Courthouse. Overall, much of the engagement and resulting plan focused on automobiles and parking.

### 1975 Master Plan

The 1975 Master Plan was a departure from the plans conducted previously, with a more holistic view of the community and its assets. This plan identified six principal goals, several of which were focused on the environment, community services, and a balanced transportation system.

The plan focused on 11 areas of the community including both commercial and residential areas, each with their own character.

Implementation recommendations included:

- *The adoption of a Capital Improvement Program*
- *Street improvements to main thoroughfares*
- *Increasing parking availability in key areas*
- *Adding new parks and community facilities*
- *Updating the zoning ordinance for flexibility*

### 1989 Update to the Master Plan

The 1989 Master Plan update relies on the same six principal goals as the 1975 plan, but provides updated implementation steps. These remain consistent with the recommendations of the previous plan and are simply the relevant steps to continue implementation.

Additional engagement was conducted including a resident survey, employee survey, pedestrian survey, and interviews with current business owners.



### 1993 Central Business Districts Master Plan

The 1993 Central Business Districts Master Plan focused on the four major business districts including the Central Business District (CBD), Clayton Road, Hanley/Wydown, and DeMun. The plan also identifies 17 Action Areas. These concentrations of commercial or civic uses are identified as secondary business districts.

Five key components are included as “Vision Components” for a successful CBD in the future including, creating a retail and mixed-use core, the Forsyth Corridor, the County Government Center, MetroLink, and residential development.

Relevant strategies to assist plan implementation include:

- *Creating an office environment that is distinguished from Downtown St. Louis*
- *Creating a Redevelopment Committee that will focus on incentives and downtown development review*
- *Limited use of redevelopment incentives*
- *The creation of a Retail/Mixed Use Core Overlay Zoning District to guide and manage downtown development*
- *Increased streetscape and beautification in Downtown*
- *Formation of a Merchants Association to assist with the promotion and growth of the Downtown retail environment*

### 2010 Master Plan Update

The 2010 Master Plan Update provides a revised Downtown Master Plan and recommendations regarding the retail environment in Downtown Clayton. The plan organizes the area into six districts and is focused on a variety of elements. These elements include:

- *Retail growth in areas with active streets*
- *New connections on Central Ave and Forsyth Blvd.*
- *Creation of new iconic civic spaces*
- *Establishing connections to Shaw Park to capitalize on the views from Downtown buildings*
- *Encouraging Downtown residential growth*
- *Developing safe linkages to adjacent neighborhoods*

### 2012 C The Future Plan

This plan was designed to be a community-based strategic plan, intended to represent the community’s vision for Clayton. Fifty stakeholders participated in the planning process using a model called “Search Conference”. The process resulted in the final plan elements including:

- *Exceptional City Services.*
- *Livable Community*
- *Strategic Relationships*
- *Economic Development and Vibrant Downtown*





### 2015 Housing Study

The 2015 Housing Study reviewed the housing supply and demand within the City. The study concluded that there is a lack of multi-family rental products within the City and that the majority of existing products are historic rehab apartments. New multi-family rental was found to be quite limited. According to the demand analysis included in this study, there is significant demand for new units.

### 2015 Parking Study

The 2015 Parking Study was conducted by Walker Parking Consultant and includes a parking needs assessment including a demand and supply analysis, review of parking alternatives, and recommendations related to parking policies.

The study finds that there are significant parking space vacancies in the Downtown area during typical peak weekday business hours, weekday evenings, and weekends. In total, more than 15,000 parking spaces were identified. Given that parking demand is driven by office workers, during evening and weekends, occupancy rates are significantly lower with only about 14% of parking occupied. The study acknowledges the occasional difficulty of finding parking in the central part of Downtown, which could speak to the need for an additional parking structure in the area. Even with projected growth and development, the study concludes that additional parking supply is not needed and instead, recommends a series of next steps, including:

- *Updating the parking requirements for businesses based on business-type and current availability of nearby parking*
- *Facilitating more shared parking arrangements between private businesses*
- *Encouraging employees to park in off-street garages or lots to leave on-street parking for visitors*

### 2020 Economic Development Strategic Plan

The 2020 Plan seeks to guide the City in fostering additional economic growth. The plan provides a baseline update to demographic data, outlines a plan to create a more supportive business environment, identifies potential barriers, and describes a vision for the City's success.

The plan notes current assets and opportunities including a vibrant and pedestrian-friendly Downtown, expanding retail and dining environments, and continued investment in the arts. Risks and challenges noted include a perception of crime in the region, the overall small-size of the City itself, a perceived lack of parking, and infrastructure strain. The plan identifies several specific goals for the future including:

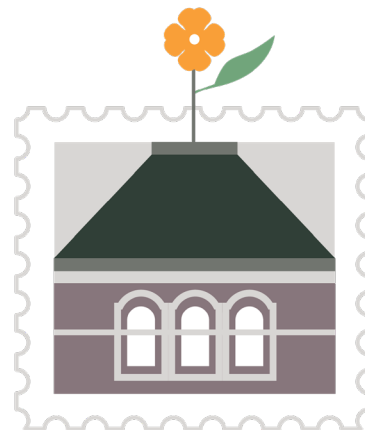
- *Decreasing the office vacancy rate from 5.3% to 5%*
- *Increasing citizen satisfaction from 91% to 95%*
- *Diversification of downtown retail*
- *Create a unique and strong identity for each neighborhood*
- *Enhance existing greenspace*
- *Increase rates of transportation use other than driving alone*



The City of Clayton has a strong history of planning in the community. From their 1958 plan by one of the nation's most prolific planners to more recent efforts to plan intentionally for the community, the City has shown a commitment to the value of planning. The past planning efforts reveal several themes, including:

- importance of the residential character
- focus on the regional location as an asset
- creating a robust mix of uses in Downtown
- strong City services and community assets

As the City enters their **Clayton Tomorrow: 2040 Comprehensive Plan** process, the learnings from past planning efforts will be an important component of ensuring this plan is rooted in the past, but planning for the future.



**CLAYTON  
TOMORROW**  
2040



# DEMOGRAPHICS

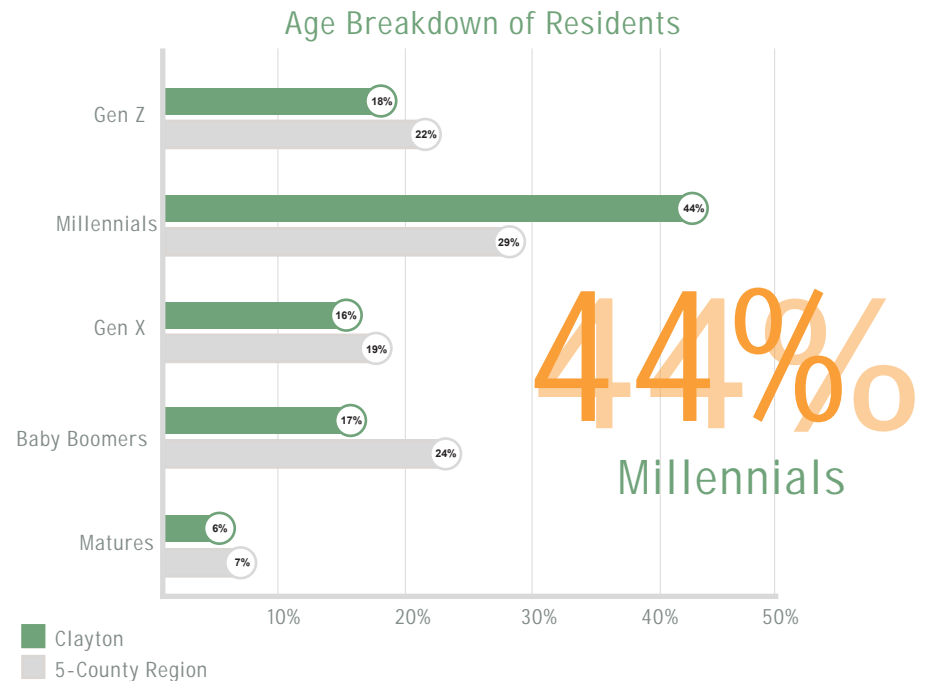
## Population

Since the City's incorporation in 1913, significant changes have occurred. With a growing population, increasing development in Clayton and in surrounding communities, and trends nationwide, the population demographics in the City of Clayton have shifted. What follows is a review of key demographic characteristics of the City's population, along with an analysis of how this impacts the community's current and future plans.

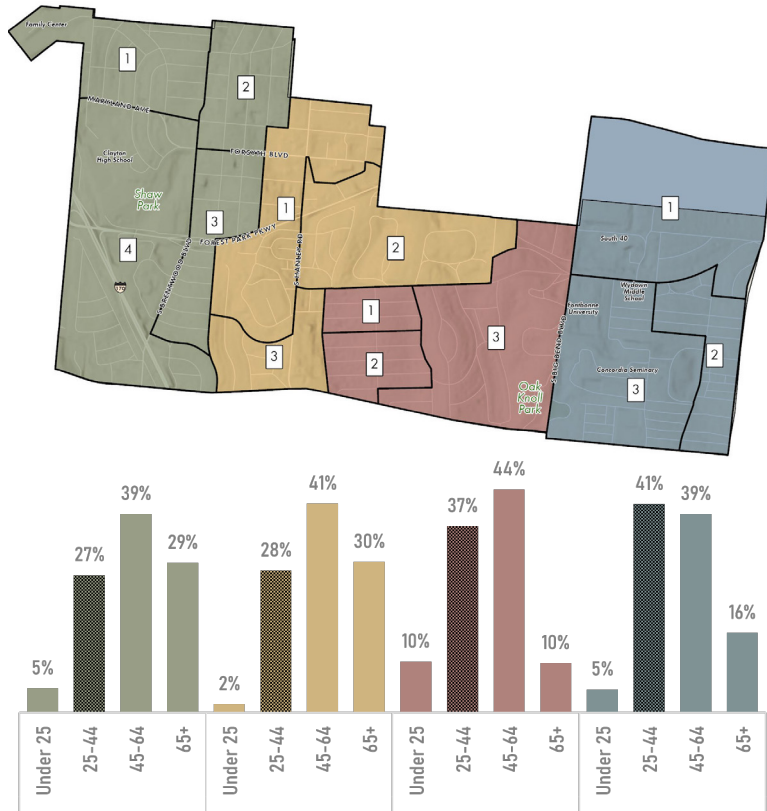
According to the US Census, the 2020 population in the City of Clayton was 17,355. While the City only added about 1,200 residents, this reflects an increase of 7.7% since 2010. In the same time period, the 5-County Region added 43,000, or an increase of only 2.17%. Over half of the additional residents in Clayton were added to the Downtown area, where significant development has occurred. The population increase reflects strong growth in the City and speaks to the desirability of the City overall, particularly as compared to other communities in the region.

## Age

The City's population breakdown is skewed heavily toward Millennials, classified as those born between 1981 and 1996. Today, this population is between the ages of 27 and 42 and represents 44% of the City's population. This is significantly higher than the 5-County Region where Millennial population makes up less than a third of the overall population. For all other age groups, the City of Clayton has a lesser percentage than the region overall. To understand this significant Millennial population, additional analysis was conducted.



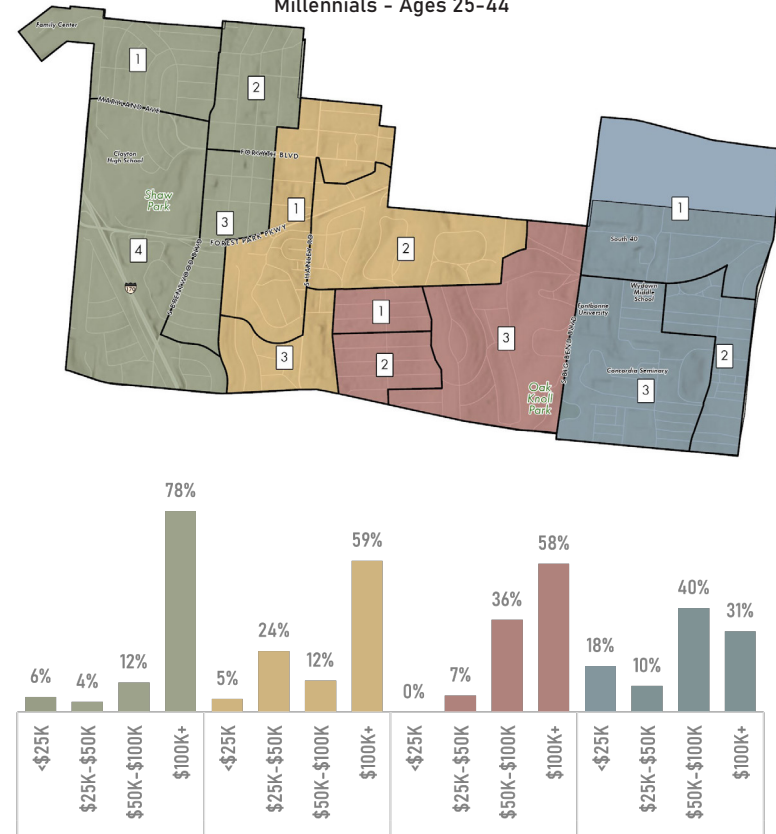
## Age Breakdown of Residents



The map and chart above depict resident age in Clayton broken down by Census tract and block group. West Clayton has the lowest percentage of householders between the ages of 25 and 44. East Clayton has the highest percentage of householders between the ages of 25 and 44. More specific demographics can be analyzed about this age group, between ages 25-44, as it largely aligns with the Millennial age group as classified above.

## Income Breakdown of Residents

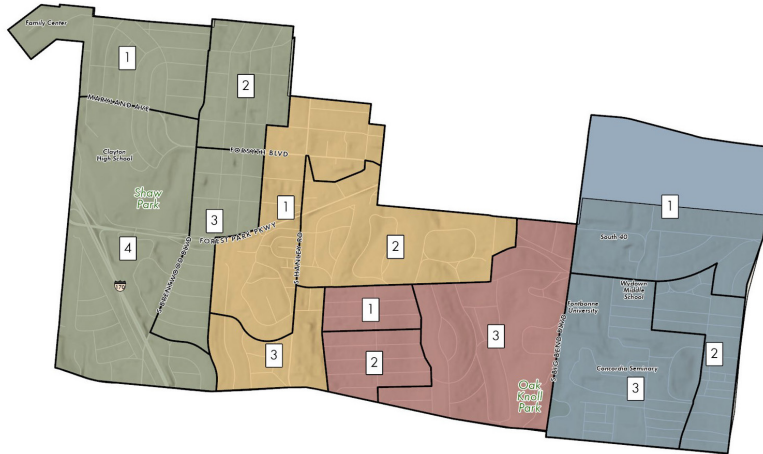
### Millennials - Ages 25-44



The map above displays income of the residents between the age of 25 and 44. As the data displays, Millennials living in West Clayton tend to have higher incomes, on average, than Millennials in other census tracts. Millennials who live in East Clayton have lower household incomes, on average, than Millennials in other census tracts.

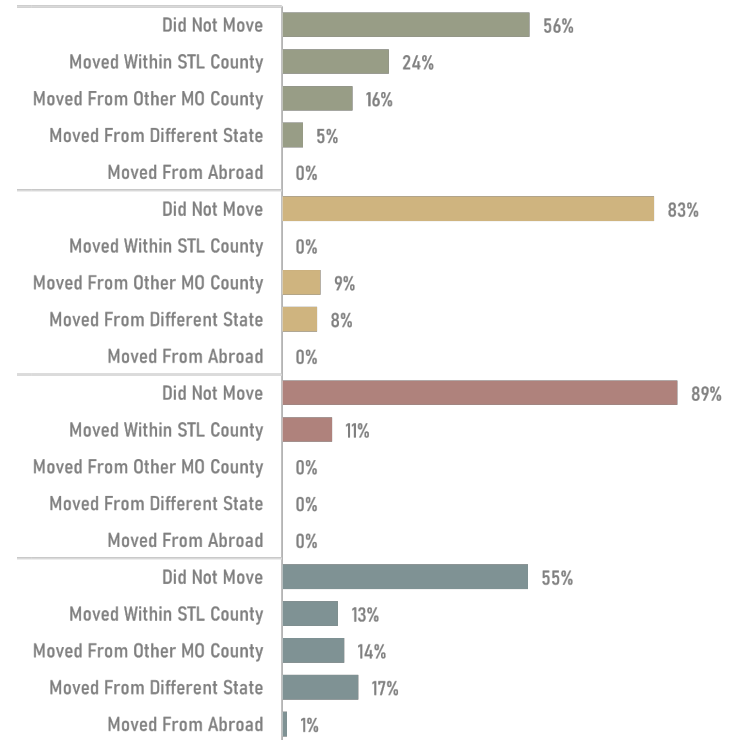


## Resident Mobility Millennials - Ages 25-44

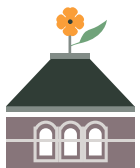


The map above and chart to the right depict resident mobility of the Millennial age group. Residents in the western part of the community have greater mobility, especially from St. Louis County and other Missouri communities. Greater mobility, especially from other states, is seen in the eastern part of the community, near the higher-education campuses. The middle portion of the community, depicted in yellow and red, has very little mobility, with more than 80% of residents indicating they did not move.

This analysis of mobility has land use implications, as residents with higher mobility tend to be looking for less permanent housing options and may defer to rental options as opposed to a more permanent homeownership situation.

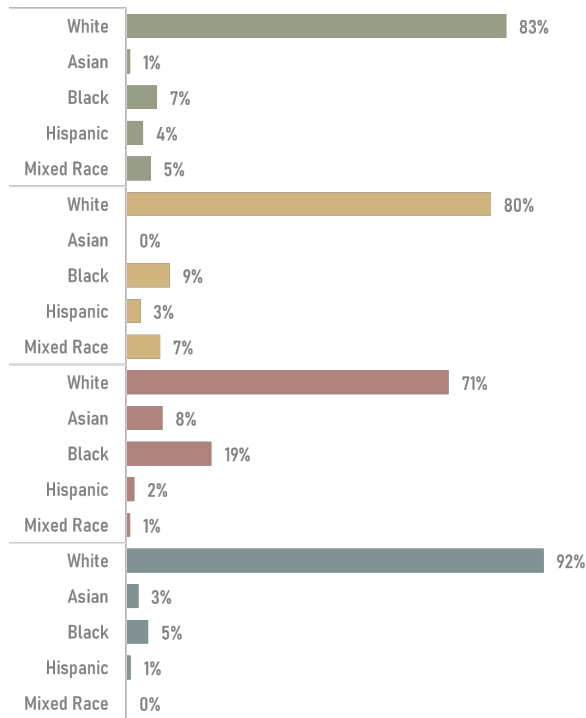


Downtown Clayton

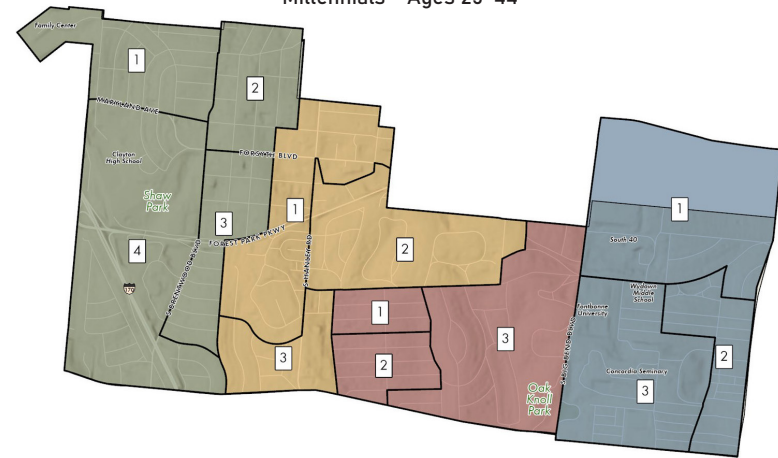


Census Tract 2164.02, shown in red below and to the right, has the highest percentage of nonwhite Millennial residents. The eastern part of the community is home to the highest percentage of white Millennial residents. This portion also has the highest percentage of mobility and lowest income.

Race of Householder  
Millennials - Ages 25-44



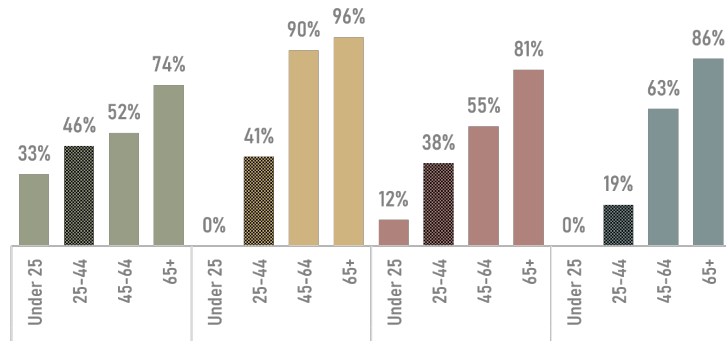
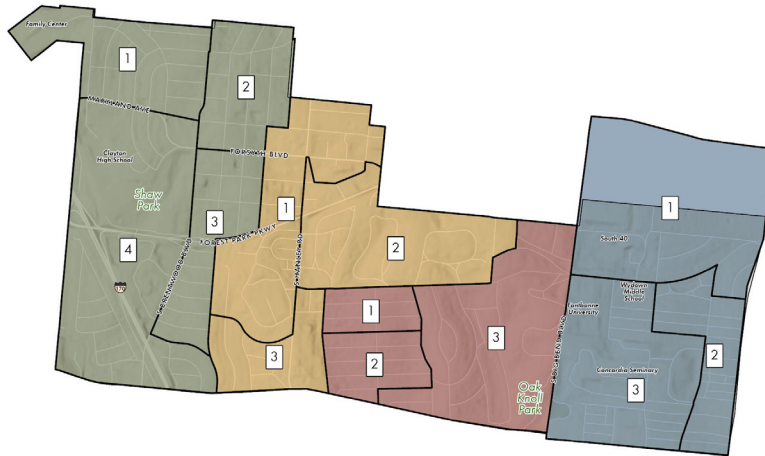
Race of Householder  
Millennials - Ages 25-44



The jail population, located at the St. Louis County Jail in block group 3 of Census tract 2165 (shown in green), is also a demographic to consider when parsing out the Millennial age group. According to the US Department of Justice, in 2020, inmates ages 18 to 34 accounted for 53% of the jail population, while inmates age 55 or older made up 7%. The exact age breakdown of inmates at the St. Louis County Jail not known, but given the high population of those categorized as Millennials, it is likely that this demographic further impacts the demographics of those in this block group. Additional analysis of the jail population is included later in this report.



## Resident Homeownership Millennials - Ages 25-44



When considering homeownership, west Clayton has the highest percentage of homeowners between the ages of 25 and 44. East Clayton has the lowest percentage of homeowners between the ages of 25 and 44. This is consistent with the other demographics found in east Clayton, where residents are more likely to have lower incomes and be more mobile.

## Student Population

To further understand the age breakdown in Clayton, further analysis of the Gen Z population was conducted. Today, the Gen Z population is between the age of 9 and 24 years old. This group encompasses both the school-aged child population, but also the undergraduate population. A portion of the graduate student population may also fall in this age group. To understand the impact that the higher-education campuses in Clayton have on the age demographics, a review of existing residential inventory on these campuses was conducted:

- *Washington University* - ~3,000 students
- *Fontbonne University* - ~135 students
- *Concordia Seminary* - ~210 students

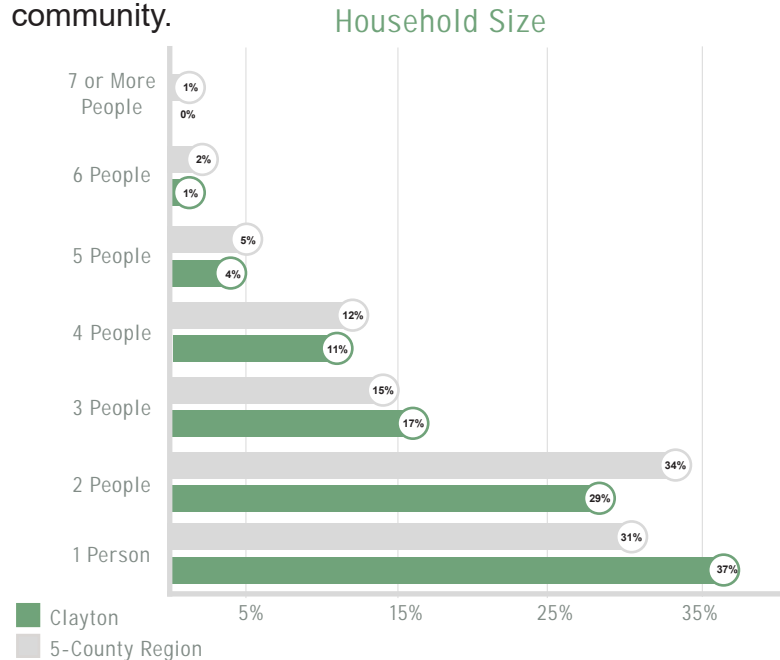
These estimates account for about 3,300 students living on campuses within Clayton. Other students affiliated with the three campuses are also likely to live in Clayton in off-campus housing. The majority of these students are classified as Gen Z. Census Data cites 3,910 as the population between 18-24 enrolled in school. These students could be living in Clayton and enrolled at other area schools, not within Clayton. With this population being transient, a number is impossible to pinpoint, though it appears between 3,300 and 4,000 undergraduate students live in the City of Clayton.





## Family Structure

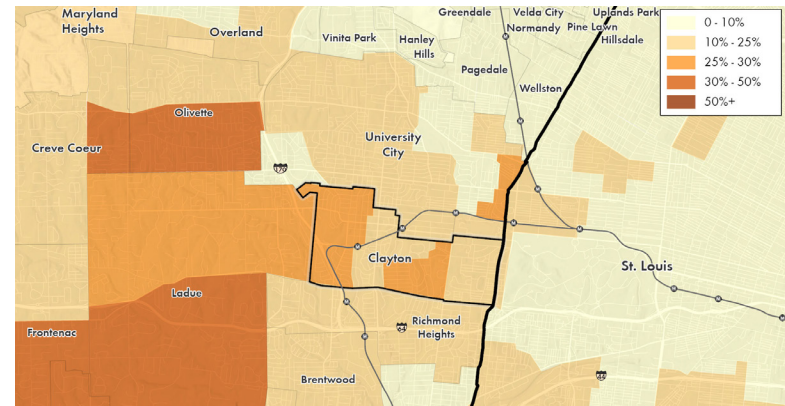
Considering the way that people in Clayton live is an important aspect of understanding the population. The structure of a family-unit or other arrangement impacts the real estate needs of residents in the community, whether it be number of bedrooms or style of unit. It also begins to create a better picture of who lives in the community.



Clayton has a unique household breakdown, with 37% of the population living in a one-person household. This is higher than that of the 5-County Region. The converse is true for two-person households, where Clayton has just 29% of the population living in this arrangement, while that number is five percentage

points higher in the broader area. Statistics are similar for households greater in size. Overall, the City has an average household size of 2.2 people.

When considering households that do or do not have children, the City has a significant share of households made up of a married couple with children. As the map below displays, married couples with children are most likely to live in two of the City's four census tracts: in the western portion of the community west of Bemiston Avenue and Meramec Avenue or in the neighborhoods between Wydown Boulevard and Clayton Road just west of Big Bend Boulevard. These two neighborhoods are characterized by larger, single-family homes and a

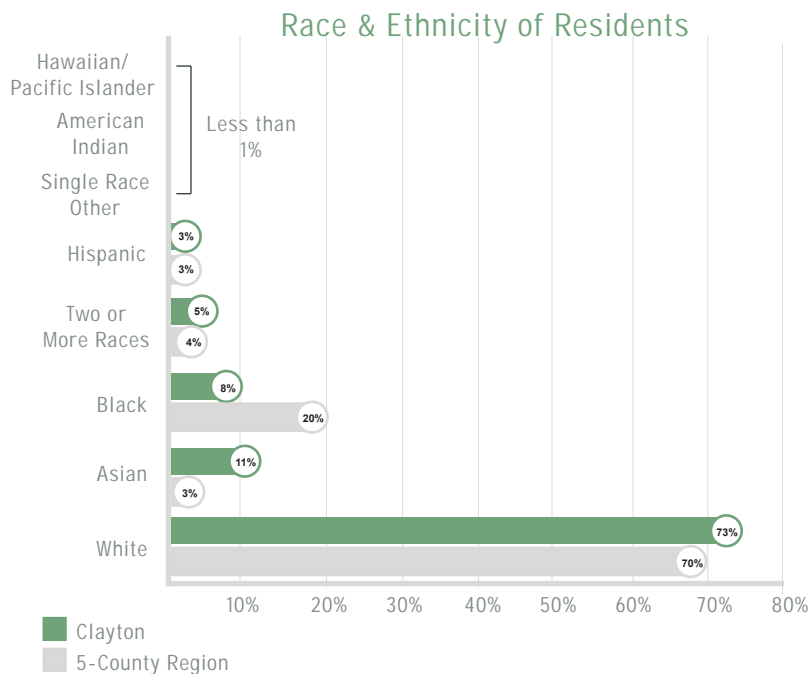


When considering living arrangements for adults over 18, 57% of these adults in Clayton are living with a spouse, as opposed to living alone, as an adult child with family, or another arrangement. This is nearly 10% higher than that of the 5-County Region. This is consistent with the family-friendly appeal of Clayton, with quality schools and a wide variety of amenities.



## Race & Ethnicity

The City of Clayton is approximately as diverse in terms of race and ethnicity as the 5-County Region, with about a third of the population identifying as a minority. While the City has a relatively similar percentage of minority population as compared to the broader region, the breakdown of that minority population is quite different. The 5-County Region is nearly 20% Black. In Clayton, only 7.7% of the population is Black. That being said, the City is more than 10% Asian, which is three times higher than the broader area.



Interestingly, the City's foreign-born residents comprise 12% of the population, significantly higher than the surrounding area. More than 2,000 of the City's

residents were born outside of the United States. Consistent with the larger percentage of Asian residents and higher number of foreign-born population than the regional average, when considering language spoken at home, the City has a lower representation of English than the 5-County Region and a significantly higher percentage of Asian-Pacific Islander language, at more than 8%.

## Disability

Based on a review of US Census data, the residents living in Clayton that have some sort of disability accounts for about 6% of the population or about 1,000 residents. These residents indicate they are living with some sort of disability of varying impact.

- 1.3% of residents have a Self-Care Disability
- 2.8% of residents have an Independent Living Difficulty
- 2.4% of residents have an Ambulatory Difficulty
- 0.9% of residents have a Vision Difficulty
- 1.8% of residents have a Hearing Difficulty
- 3% of residents have a Cognitive Difficulty

A self-care disability indicates these residents are able to live on their own. Those with independent living difficulty have a disability that makes living alone hard. Ambulatory difficulty is defined as those residents who have difficulty walking. Other Clayton residents are living with a disability impacting their sight, hearing, or cognitive abilities. Many of these disabilities overlap and have a varying degree of impact on one's ability to easily live in the City.



## Income

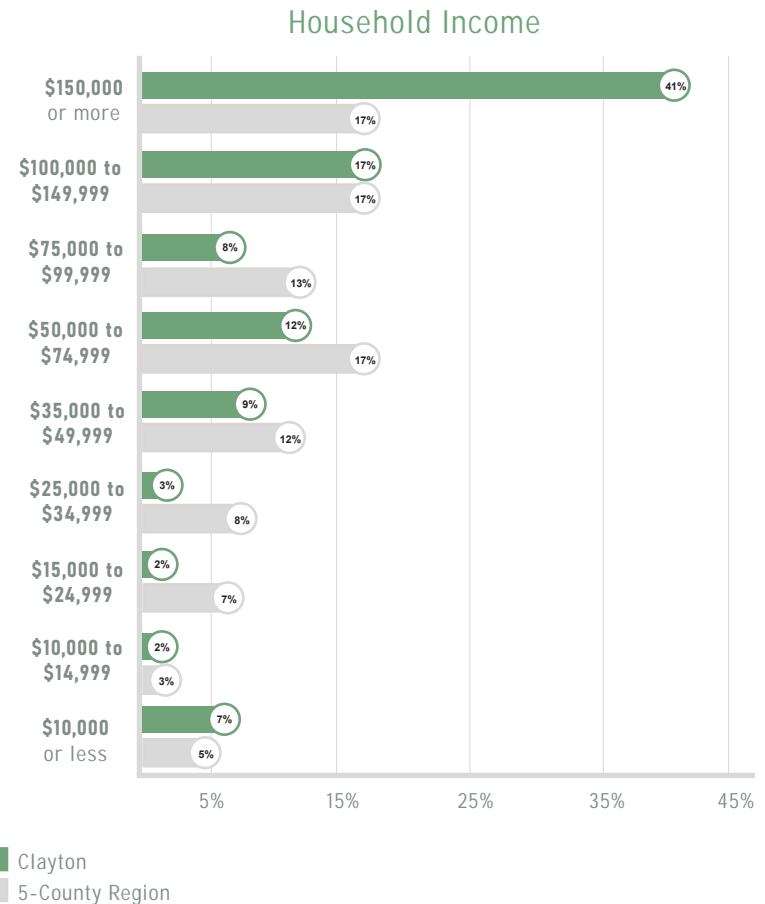
The City of Clayton is home to residents with a wide variety of household incomes. The City has a significant number of students making little to no income, representing a large proportion of residents. On the other end, the City has a very high median income relative to neighboring communities. The median household income in Clayton is \$117,593, significantly higher than that of the 5-County Region, which is \$79,204.

Income has also grown at a faster rate in the City, reflecting a growing gap between the median income in the City as compared to the area overall.

As the chart depicts, for some income categories, residents in the City of Clayton mirror those of the neighboring counties. For others though, there is a clear discrepancy. Because of the large number of students living in Clayton, the City sees a larger percentage of residents making less than \$10,000 per year. That is offset by the more than 40% of households making \$150,000 or more.

The City of Clayton has about half the population of low to moderate income residents as the nearby region. This metric is defined by the US Department of Housing and Urban Development and means those residents with an income that is less than 80% of the local area median income. A significant portion of this population

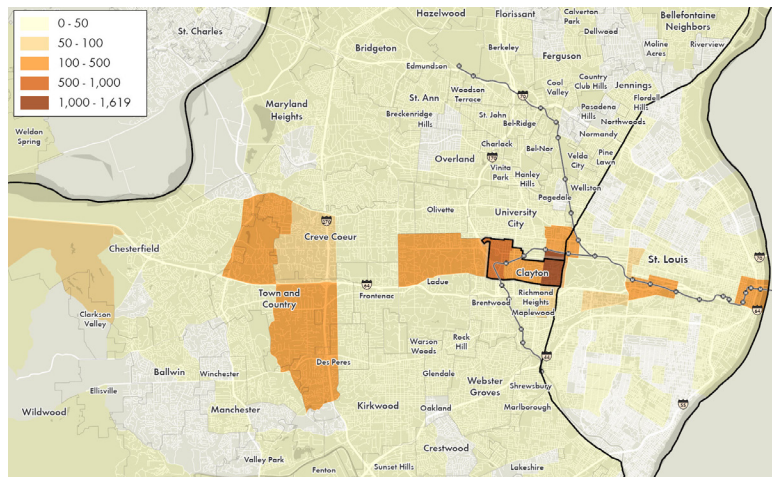
in Clayton is comprised of the students living on one of the higher-education campuses in Clayton or in nearby housing. This population is making little to no income. Similarly, the population housed in the County Jail in Clayton would have no income, further contributing to this.



## Work & Education

According to the US Census, Clayton has just over 7,000 residents that make up their working population over the age of 16. This represents a 54% labor participation rate. In other words, of residents over the age of 16, just over half are working. The map below displays where these residents travel for work each day. There is a concentration of residents working in the City of Clayton, which includes both those going to offices and those that might work from their homes. Given the low number of residents that both live and work in the community, many of these working residents travel outside of the City for work.

Concentrations are visible in Downtown St. Louis and in the Cortex Innovation District and BJC Medical



Center areas in the City of St. Louis. Both of these areas are accessible via MetroLink, directly from Downtown Clayton. Other concentrations are visible in the mid-county areas just west of Clayton, home to several corporate headquarters and significant hospital and healthcare facilities.

Residents in Clayton have attained significantly higher percentages of higher education degrees than the surrounding area. In fact, nearly 80% of residents in Clayton over 25 have a bachelor's degree or higher. This number is less than half for the 5-County St. Louis Region. Overall, Clayton has a very well educated population that, interestingly, has a lower labor participation rate than the region. Nearly 40% of people in this age group have a degree in Science or Engineering. Despite this though, less than 10% of them are employed in a STEM field.

The City of Clayton is located in the center of the St. Louis Region and likely benefits from this convenience, both as a place to visit and as a home for the working population of the community. Residents have easy access to several major job centers, providing a level of convenience that even non-working members of the community likely benefit from.



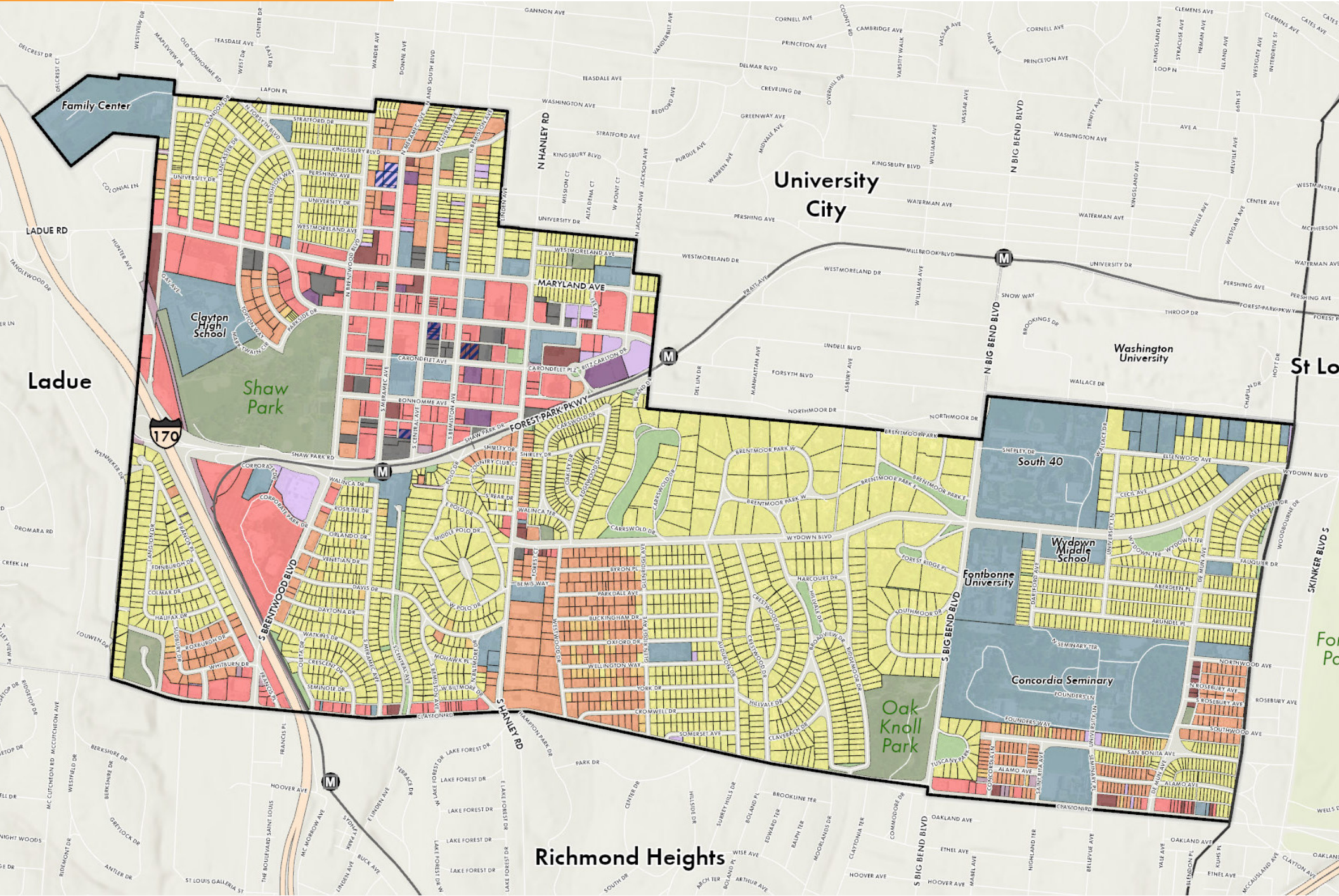


# LAND USE



# EXISTING LAND USE

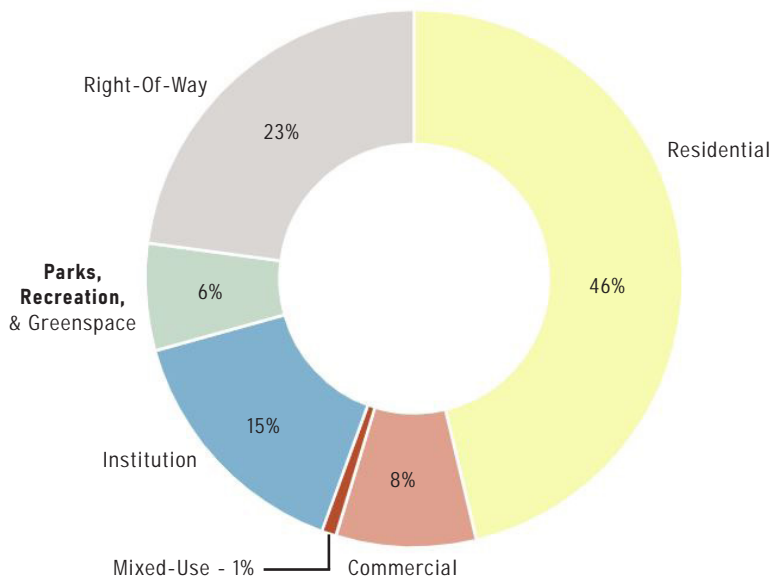
- Single-Family
- Duplex / Townhome
- Multi-Family
- Commercial
- Greenspace
- Hospitality
- Mixed-Use
- Institution
- Parks & Recreation
- Parking
- Utility
- Vacant
- Parcel in Progress of Redevelopment



In Clayton, the built environment is stable, with no additional room for growth. That being said, due to market factors, the community has experienced significant construction in recent years, replacing previous buildings with new, often changing the land use and impacting the built environment in several key areas.

Today, the land use environment is mixed, with a variety of uses across the community. The map on the previous page depicts the detailed land use breakdown as of August 2023. This map also displays parcels in progress of redevelopment, indicating land use changes are in process.

Existing Land Use Breakdown in Clayton



**Residential** land uses cover 729.8 acres in the City, or 46% of all land. This includes single-family homes on larger lots as well as large, multi-unit residential buildings.

**Commercial** land uses cover 133 acres or just 8% of land in Clayton. These land uses are scattered throughout the community in several commercial districts of varying size and character.

**Mixed-Use** covers 13.8 acres, or 1% of all land in Clayton. A growing typology, the City’s mixed-use land is concentrated in Downtown and key commercial corridors and typically includes retail on the first floor and residential or office uses above.

**Institutional** land covers 238 acres of 15% of the City of Clayton. These land uses include large campuses such as Washington University, Concordia Seminary, Fontbonne, and Clayton High School as well as smaller land uses such as religious institutions.

**Parks, Recreation, & Greenspace** land uses cover 101.6 acres or about 6% of land in Clayton and includes large and small parks, trails, and other informal greenspaces.

**Right-of-Way** includes streets, highways, railroads, and other easements and accounts for 361 acres or 23% of all land in Clayton.



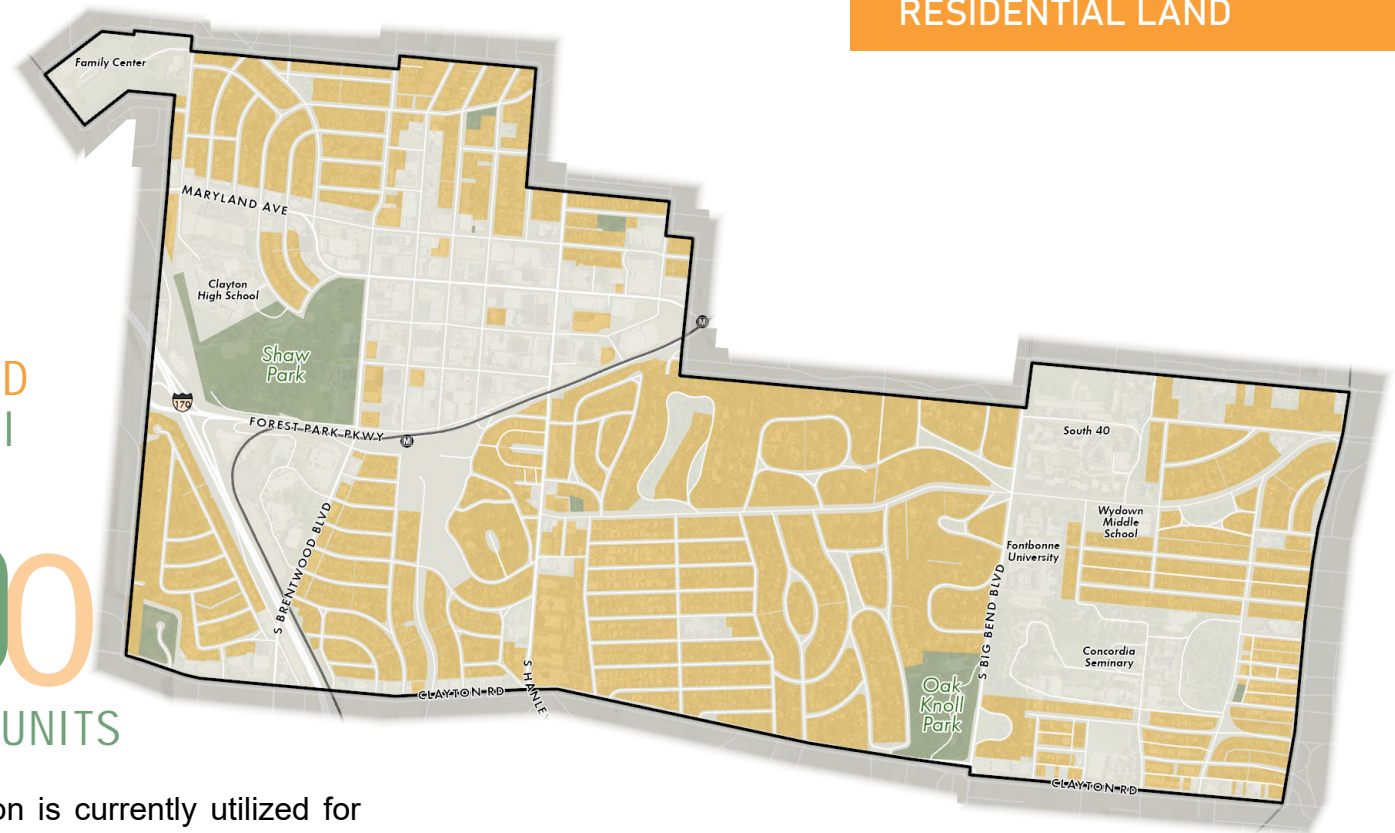


»»» RESIDENTIAL



46% OF LAND  
used for residential

6,000 HOUSING UNITS



About 46% of land in Clayton is currently utilized for residential purposes, supporting just over 6,000 housing units. While 82% of residential land in Clayton is used for single-family detached housing, this only accounts for 34% of Clayton's housing stock. This discrepancy in land coverage and unit mix can be attributed to the larger lot sizes of many of the homes in Clayton, as well as the number of mid-sized and large multi-family buildings located in the City. Additionally, 56% of Clayton's housing units are owner occupied compared to 69% of housing units in the 5-county region are owner occupied.

Overall, the City's housing stock is older, more expensive, and consists of more multi-unit buildings than the surrounding 5-County Region. Despite having a median home value of \$683,400, more than three times higher than the region's median home value, Clayton has a similar percentage of cost-burdened households at 27%.

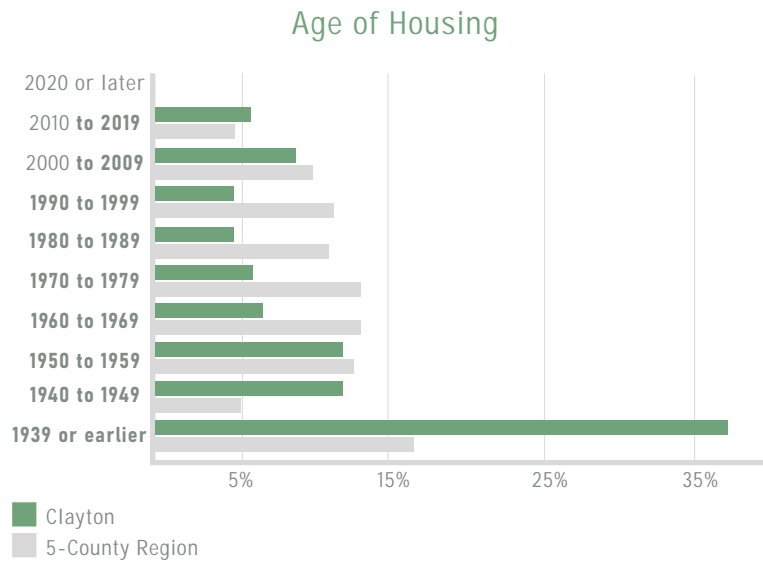
The map above highlights residential land use in Clayton, which is well distributed throughout the City.



# Housing Stock

## Age of Housing Stock

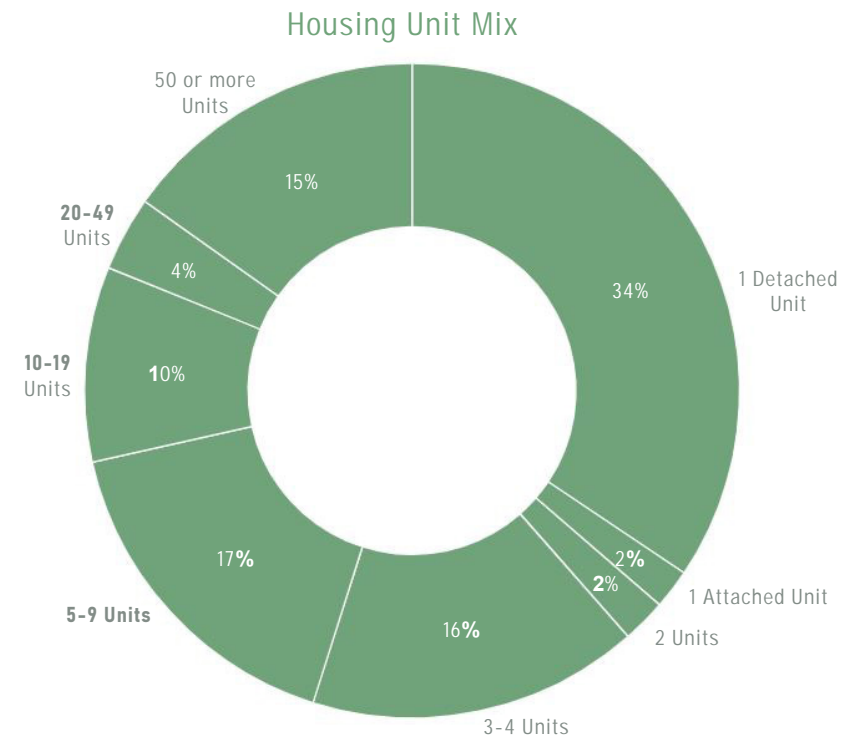
The 5-county region as a whole has a lot of older housing stock, having only seen 15% of its housing units built since 2000. Clayton has a similar distribution of housing units built since 2000, but its housing stock is heavily concentrated in housing built prior to 1939 (37%). The chart below compares the distribution of housing units by year they were built in Clayton and the 5-County region.



## Unit Mix

While 82% of Clayton’s residential land is utilized for single-family housing, Clayton’s housing stock is

relatively diverse. Single-family detached housing makes up 34% of Clayton’s housing units, and 15% of Clayton’s housing units are in large multi-family buildings consisting of 50 or more units. The other half of Clayton’s housing stock are located within mid-sized residential buildings, often referred to as “missing middle housing.” This distribution of housing types allows Clayton to accommodate residents with a variety of lifestyles and housing preferences. The chart below shows the breakdown of housing units by building size in Clayton.



Clayton's housing stock also offers a variety of options for residents in terms of number of bedrooms. 38% of Clayton's housing units have two bedrooms, and another 23% are three-bedroom units. Compared to the 5-County Region, Clayton has a larger percentage of units with one or two bedrooms.



### Senior Housing

The City of Clayton has about 365 units of senior housing in facilities offering independent living, assisted living, or memory care. The majority of these units are part of Clarendale Clayton, which was built in 2021 and provides all three types of senior housing and care.

### Senior Housing Inventory

Property Name	Address	Type	Year Built	# of Units
Clarendale Clayton	7651 Clayton Rd	Independent Living	2021	195
Clarendale Clayton	7651 Clayton Rd	Assisted Living	2021	66
Clarendale Clayton	7651 Clayton Rd	Memory Care	2021	20
Bethesda Barclay House	230 S Brentwood Blvd	Independent Living	1971	84

As discussed previously, the City is home to about 1,000 residents with some kind of disability. In addition, 6% of residents are over 75, accounting for approximately 1,000 residents. These numbers likely reflect an overlap and some residents that do not require senior housing due to age or ability, but the current 365 units of senior housing supply may not be suitable for the current population.



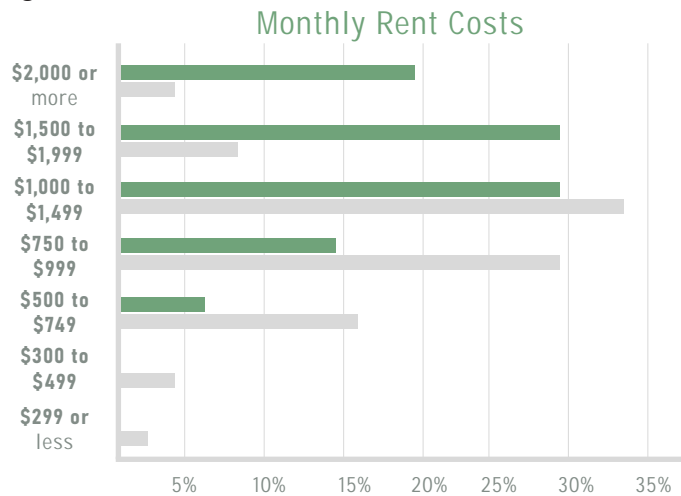
Clarendale Clayton



# Housing Affordability

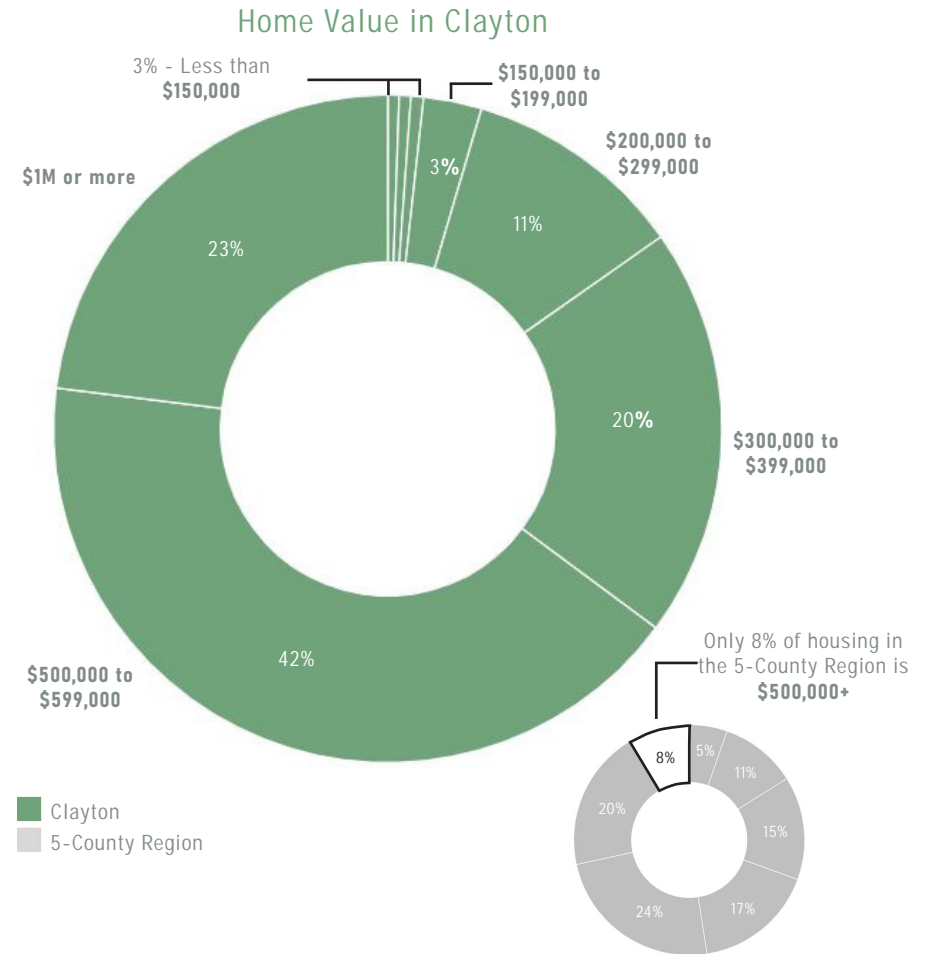
## Housing Costs

The cost of housing in Clayton is significantly higher than in the 5-County Region. The median rent in Clayton is \$1,490, compared to \$1,053 regionally. This discrepancy can largely be attributed to the fact that 49% of renter households pay \$1,500 or more on rent in Clayton, compared to just 12% of renter households in the 5-County Region. The graph below compares the rent costs for households in Clayton and the 5-County region.



The median home value in Clayton is \$683,400, more than three times the median home value of \$222,843 in the 5-County Region. Nearly two-thirds (65%) of homes in Clayton are valued at \$500,000 or more. This

is a stark contrast to the 5-County region where only 9% of homes have that valuation. Only 4% of homes in Clayton have a value under \$200,000. The chart below shows the distribution of homes by value in Clayton and the 5-county region.

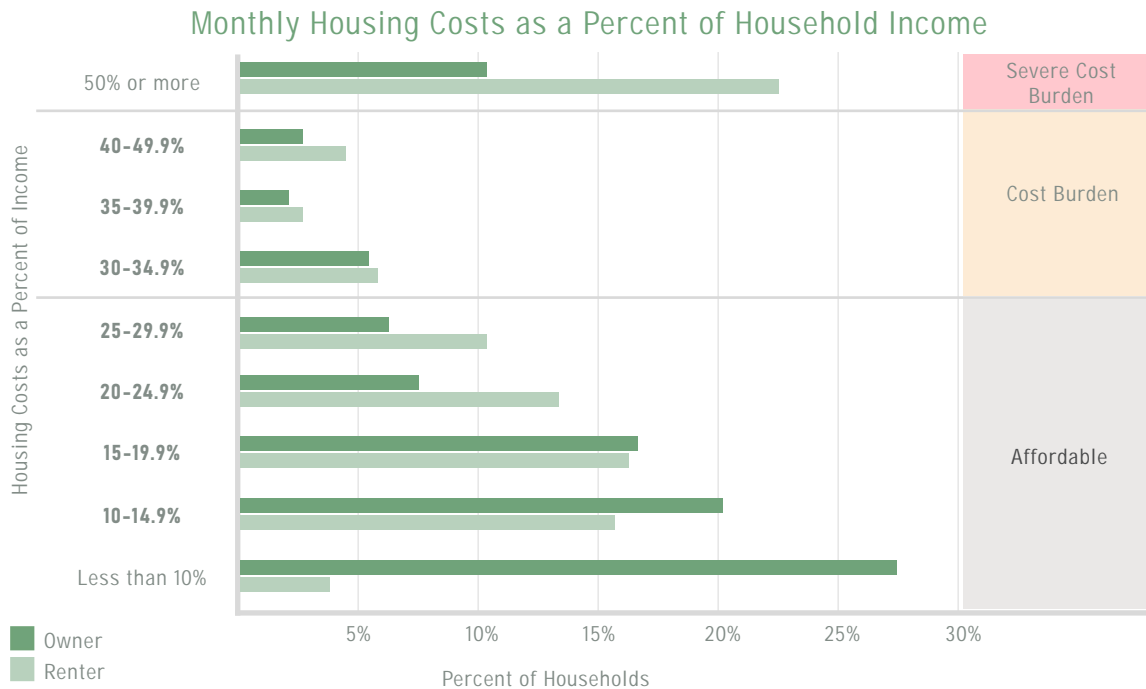


### Cost-Burdened Households

A common measure of the affordability of housing in a region looks at how much households are spending on their housing expenses relative to their income. It is recommended that households spend no more than 30% of household income on housing costs. As a result, a household is defined as being housing cost burdened if they spend more than 30% of household income on housing costs. This could include rent, mortgage payments, utilities, insurance, real estate taxes, and other housing expenses or fees. Severe housing cost burden is defined as spending more than 50% of household income on housing costs.

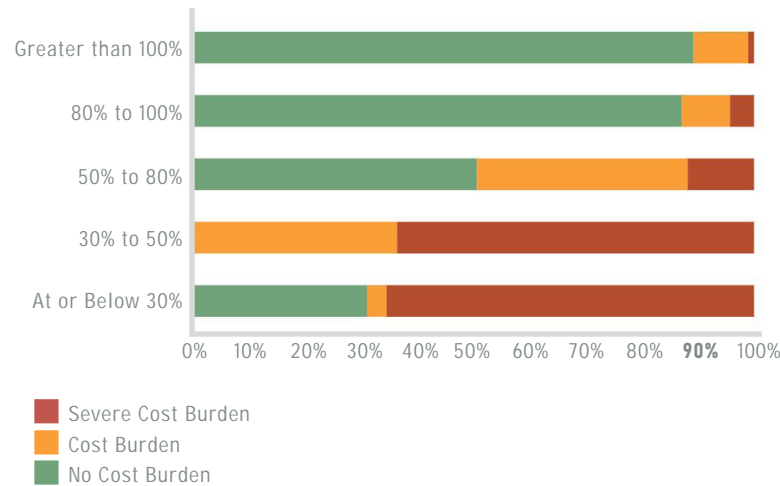
About 27% of residents in Clayton are housing cost burdened. Despite the high cost of housing in Clayton, this percentage is similar to the 5-County Region where 26% of residents are cost burdened.

Renters in Clayton spend a higher percentage of their income on housing costs than homeowners and as a result are more likely to be cost burdened. 23% of renters in Clayton are severely cost burdened, and 14% are cost burdened. In contrast, only 10% of homeowners are severely cost burdened, and 10% are cost burdened.



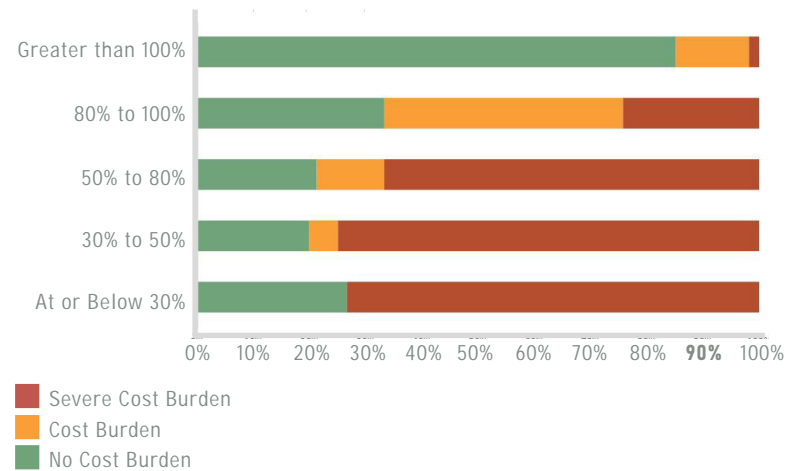
Housing cost burden disproportionately affects the lowest earning households in Clayton. The figures below show the percent of owner and renter households with housing cost burden and severe housing cost burden across different income brackets relative to the HUD Area Median Family Income (HAMFI). In 2019, HAMFI for the STL, MO-IL Metropolitan Area was \$81,300. Households earning less than 50% of HAMFI experience the highest rates of severe cost burden, while fewer households earning at or above HAMFI experience cost burden.

Percent of Renter Households with Housing Cost Burden by Level of Income



While an overall higher proportion of renter households are housing cost burdened than homeowners, housing cost burden disproportionately affects moderate-income owner households relative to moderate-income renter households. 67% of owner households earning between 50% and 80% of HAMFI are severely cost burdened compared to just 12% of renter households in that same income bracket. Similarly, 24% of owner households earning between 80% and 100% of HAMFI are severely cost burdened compared to just 4% of renter households. This difference in cost burden for renters and owners is the result of housing costs associated with home ownership, in particular mortgage payments on high-value homes, are on average higher in Clayton than typical rental rates.

Percent of Owner Households with Housing Cost Burden by Level of Income



The chart below displays the income necessary to afford different levels of housing costs. The median rent for Clayton is \$1,490 which requires a median annual household income of more than \$60,000 to not be cost burdened. In addition, monthly mortgage payments on a home valued at the City's median of \$683,400, would be around \$3,750. In order to afford a mortgage

payment of this size, a household would need to earn more than \$150,000 annually. Additional costs would also factor into a household's cost burden beyond the rent or mortgage payments, such as utilities, insurance, condo association fees, and taxes, further increasing the income necessary to be able to afford housing in Clayton.

Cost Burden by Household Income & Monthly Housing Cost

	\$10,000	\$15,000	\$25,000	\$35,000	\$50,000	\$75,000	\$100,000	\$150,000	\$200,000	\$250,000	\$300,000
\$250	30.0%	20.0%	12.0%	8.6%	6.0%	4.0%	3.0%	2.0%	1.5%	1.2%	1.0%
\$500	60.0%	40.0%	24.0%	17.1%	12.0%	8.0%	6.0%	4.0%	3.0%	2.4%	2.0%
\$750	90.0%	60.0%	36.0%	25.7%	18.0%	12.0%	9.0%	6.0%	4.5%	3.6%	3.0%
\$1,000	120.0%	80.0%	48.0%	34.3%	24.0%	16.0%	12.0%	8.0%	6.0%	4.8%	4.0%
\$1,250	150.0%	100.0%	60.0%	42.9%	30.0%	20.0%	15.0%	10.0%	7.5%	6.0%	5.0%
\$1,500	180.0%	120.0%	72.0%	51.4%	36.0%	24.0%	18.0%	12.0%	9.0%	7.2%	6.0%
\$1,750	210.0%	140.0%	84.0%	60.0%	42.0%	28.0%	21.0%	14.0%	10.5%	8.4%	7.0%
\$2,000	240.0%	160.0%	96.0%	68.6%	48.0%	32.0%	24.0%	16.0%	12.0%	9.6%	8.0%
\$2,250	270.0%	180.0%	108.0%	77.1%	54.0%	36.0%	27.0%	18.0%	13.5%	10.8%	9.0%
\$2,500	300.0%	200.0%	120.0%	85.7%	60.0%	40.0%	30.0%	20.0%	15.0%	12.0%	10.0%
\$2,750	330.0%	220.0%	132.0%	94.3%	66.0%	44.0%	33.0%	22.0%	16.5%	13.2%	11.0%
\$3,000	360.0%	240.0%	144.0%	102.9%	72.0%	48.0%	36.0%	24.0%	18.0%	14.4%	12.0%
\$3,250	390.0%	260.0%	156.0%	111.4%	78.0%	52.0%	39.0%	26.0%	19.5%	15.6%	13.0%
\$3,500	420.0%	280.0%	168.0%	120.0%	84.0%	56.0%	42.0%	28.0%	21.0%	16.8%	14.0%
\$3,750	450.0%	300.0%	180.0%	128.6%	90.0%	60.0%	45.0%	30.0%	22.5%	18.0%	15.0%
\$4,000	480.0%	320.0%	192.0%	137.1%	96.0%	64.0%	48.0%	32.0%	24.0%	19.2%	16.0%
\$4,250	510.0%	340.0%	204.0%	145.7%	102.0%	68.0%	51.0%	34.0%	25.5%	20.4%	17.0%
\$4,500	540.0%	360.0%	216.0%	154.3%	108.0%	72.0%	54.0%	36.0%	27.0%	21.6%	18.0%
\$4,750	570.0%	380.0%	228.0%	162.9%	114.0%	76.0%	57.0%	38.0%	28.5%	22.8%	19.0%
\$5,000	600.0%	400.0%	240.0%	171.4%	120.0%	80.0%	60.0%	40.0%	30.0%	24.0%	20.0%
\$5,250	630.0%	420.0%	252.0%	180.0%	126.0%	84.0%	63.0%	42.0%	31.5%	25.2%	21.0%
\$5,500	660.0%	440.0%	264.0%	188.6%	132.0%	88.0%	66.0%	44.0%	33.0%	26.4%	22.0%
\$5,750	690.0%	460.0%	276.0%	197.1%	138.0%	92.0%	69.0%	46.0%	34.5%	27.6%	23.0%
\$6,000	720.0%	480.0%	288.0%	205.7%	144.0%	96.0%	72.0%	48.0%	36.0%	28.8%	24.0%

■ Cost Burden  
■ Severe Cost Burden

  Median Household Income

55%

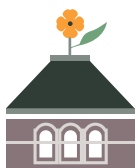
of renters in Clayton earn less than \$75,000

37%

Median Rent

of homeowners in Clayton earn less than \$150,000

Est. Mortgage Payments on Median Home Value



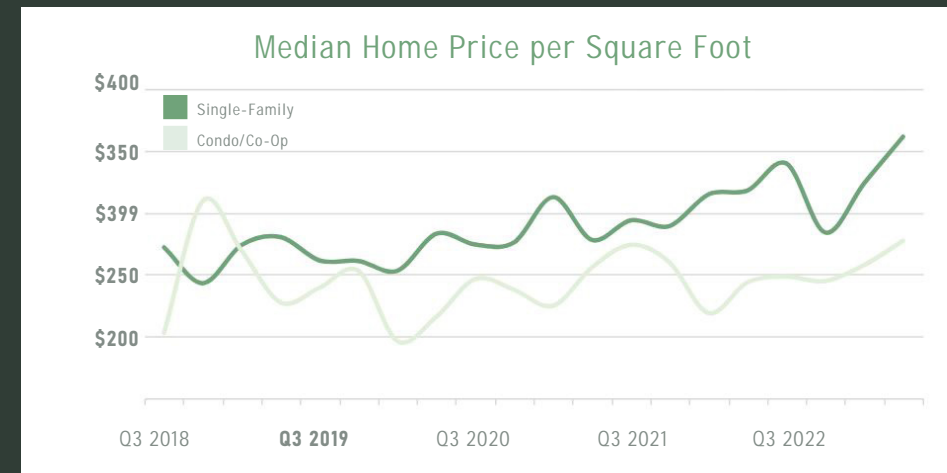
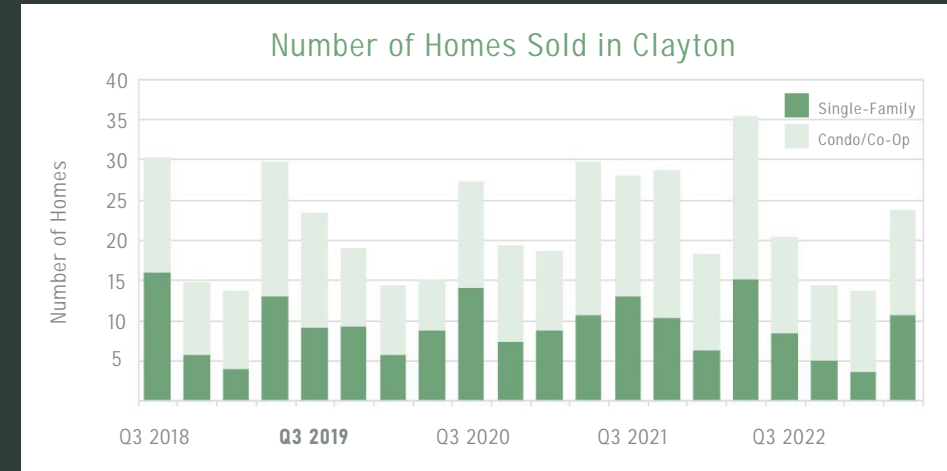
# Housing Market

## For-Sale Housing Market

The for-sale housing market in Clayton has been very active over the last five years, averaging 104 home sales and 141 condominium or co-op sales annually. The median single-family home price in Clayton is approximately \$1.2M and \$430,000 for a condominium or co-op. Sale prices per square foot changed minimally in 2019 and 2020 but have since grown between 7% and 9% annually for single-family homes. Condominium and co-op sale price trends have been more irregular. The median length of time a home will spend on the market in Clayton is 50 days. The following table shows the annual numbers of homes sold, median home price, and median price per square foot for single-family and condominium/co-op homes. The graphs to the right show the quarterly trends for the number of homes sold and the sale price per square foot over the last five years.

Annual Single-family and Condo/Co-Op Sales

Year	Homes Sold		Median Home Price		Median Price PSF	
	Single-Family	Condo/Co-Op	Single-Family	Condo/Co-Op	Single-Family	Condo/Co-Op
2018	76	84	\$904,332	\$461,421	\$260	\$255
2019	106	151	\$823,950	\$413,366	\$269	\$247
2020	107	121	\$831,083	\$343,638	\$272	\$224
2021	128	187	\$887,000	\$415,000	\$294	\$254
2022	104	161	\$987,708	\$402,033	\$314	\$239





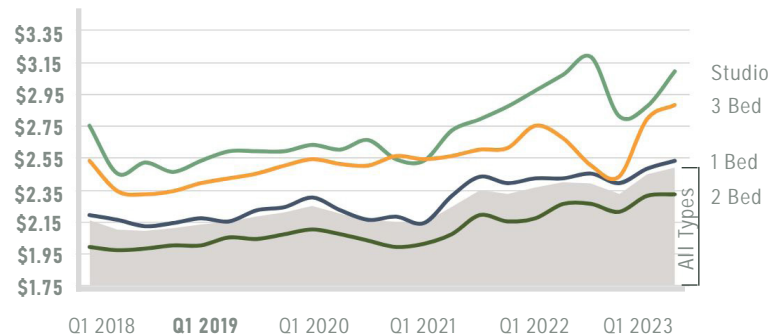
## Rental Housing Market

The rental market in Clayton has seen growth in rental rates and a decline in vacancy over the past five years. Rent per square foot has grown on average 3% per year across all unit types. Rent per square foot of rental units by the number of bedrooms is summarized annually in table below and visualized quarterly in the chart that follows.

Annual Rent per Square Foot

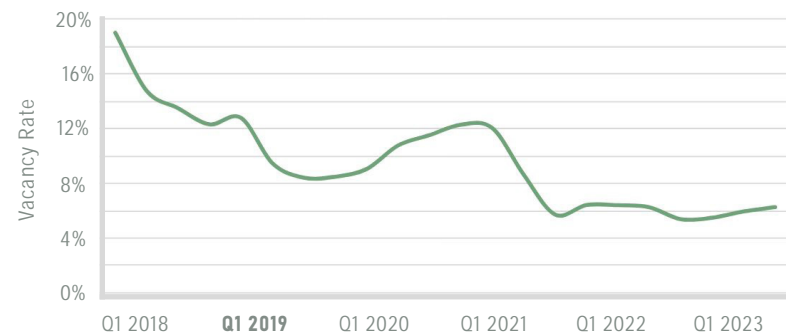
Year	Studio	1 Bed	2 Bed	3 Bed
2018	\$2.55	\$2.15	\$1.99	\$2.38
2019	\$2.58	\$2.20	\$2.04	\$2.44
2020	\$2.61	\$2.22	\$2.05	\$2.53
2021	\$2.73	\$2.32	\$2.11	\$2.58
2022	\$3.01	\$2.42	\$2.23	\$2.59
2023	\$2.98	\$2.51	\$2.32	\$2.84

Rent per Square Foot by Number of Bedrooms



The stabilized vacancy rate of rental units in Clayton has declined over the past 5 years, except for a jump in vacancy in 2020 during the height of the COVID-19 pandemic. By the first quarter of 2021, vacancy was declining and dropped below pre-COVID levels in Q3 2021. The graph below shows the quarterly stabilized vacancy rate over the past five years.

Stabilized Vacancy Rate of Rental Units



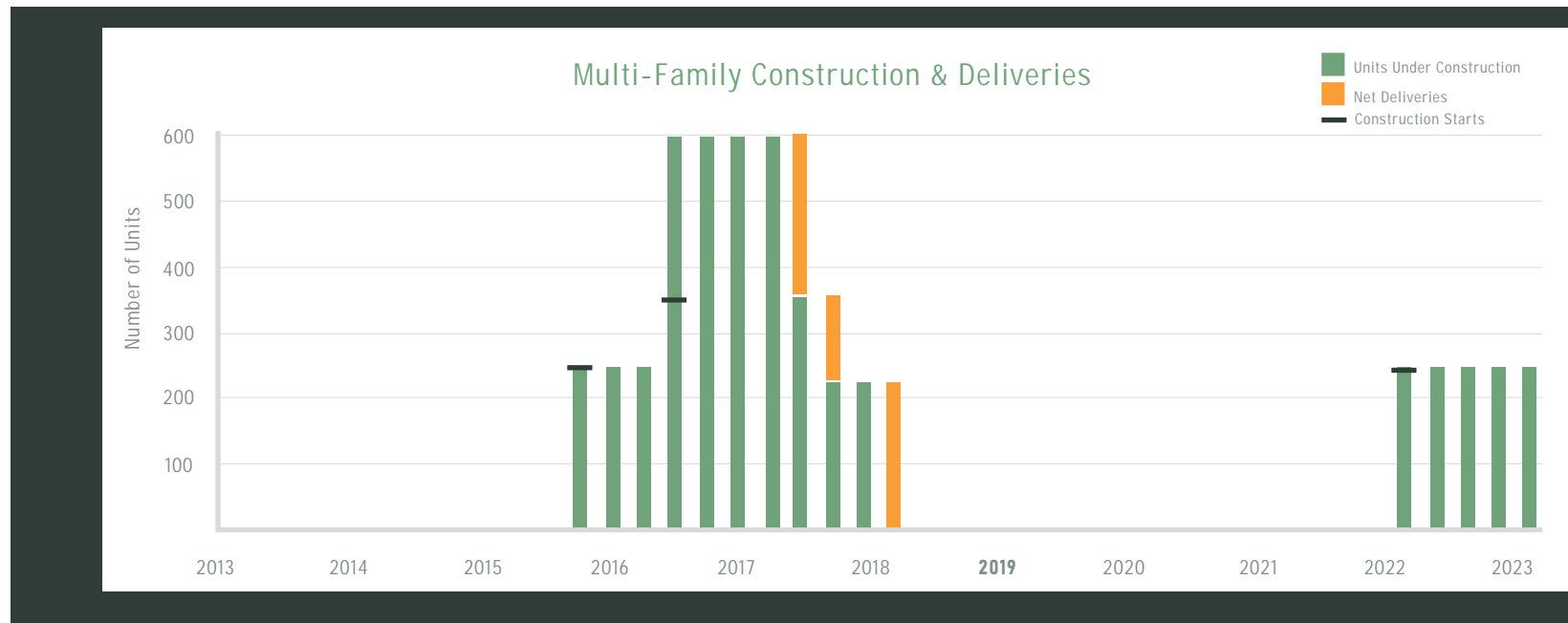
## Housing Production

Clayton's housing market continues to see growth with recently completed, under construction, and proposed developments. The table that follows outlines these developments, which includes 598 units built since 2017, 237 currently under construction, and another 698 proposed. The chart on the following page shows the multi-family construction trends since 2013.



## Recent & Proposed Multi-Family Development

Address	Property Name	Status	Year Built / Est. Completion	Number of Units
25-45 N Central Ave	Ceylon	Recent Development	2018	120
8500 Maryland Ave	The Barton	Recent Development	2018	228
212 S Meramec Ave	Two Twelve Clayton	Recent Development	2017	250
9 N Bemiston Ave	Bemiston Place	Under Construction	2024	237
111 S Meramac Ave	-	Proposed	2025	299
50 S Bemiston Ave	-	Proposed	2025	254
201 N Meramec Ave	-	Proposed	2026	145



## Regional Comparison

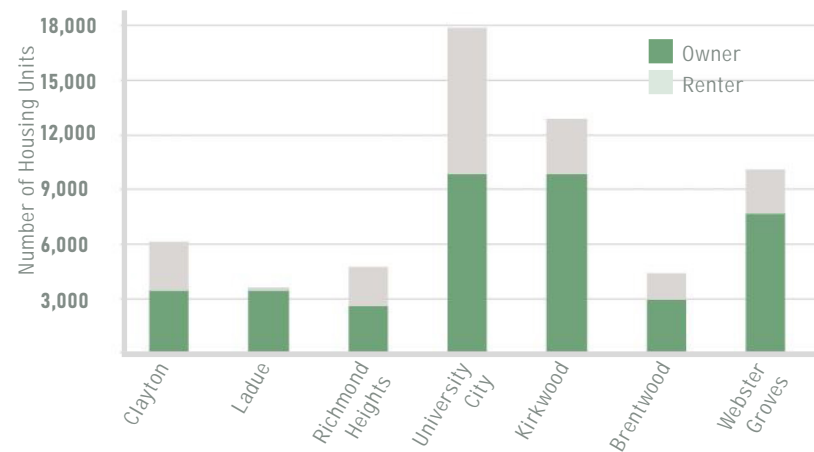
The comparison of current housing conditions to the 5-County Region is useful to understand how Clayton’s housing stock and market fits into the region. However, it is also useful to consider housing trends on a smaller scale by comparing Clayton to some of its neighboring communities and peer cities. These communities are not intended to be peers to Clayton in every aspect, as some may have more similarity in their single-family housing stock, and others may be more comparable when considering multi-family housing. Rather, these comparisons help to better understand what housing options exist in these nearby communities to better understand how Clayton’s residential market compares when it comes to individual resident choices.

### Housing Stock

The City of Clayton’s rests in the middle of many of its neighbors regarding number of housing units in each community. Ladue, Richmond Heights, and Brentwood all have fewer housing units than Clayton, while University City, Kirkwood, and Webster Groves have significantly more. With regards to housing tenure, Clayton’s mix of renter-occupied and owner-occupied housing is similar to that of Richmond Heights and University City, with owner-occupied housing making up about 55 to 56% of housing units. In contrast, 96% of housing units in Ladue are owner-occupied. Kirkwood and Webster Groves each have just over three-quarters

of their housing units as owner-occupied (77% and 76% respectively), and just over two-thirds (67%) of homes in Brentwood are owner-occupied.

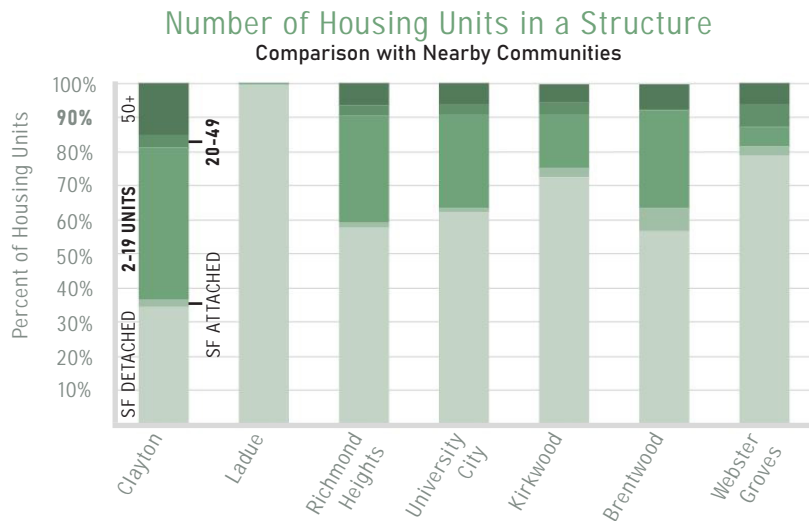
Owner and Renter Occupied Housing Units  
Comparison with Nearby Communities



While the median age of Clayton’s housing stock was significantly older than that of the 5-County region, Clayton’s housing is similar in age to many of its surrounding communities. The median year built for homes in Clayton is 1951, the same as University City and Webster Groves. Richmond Heights has older housing stock, on average, with a median year built of 1943, while Kirkwood had a median year built of 1962. The following figure displays the comparison of median year built for Clayton and its neighboring communities.

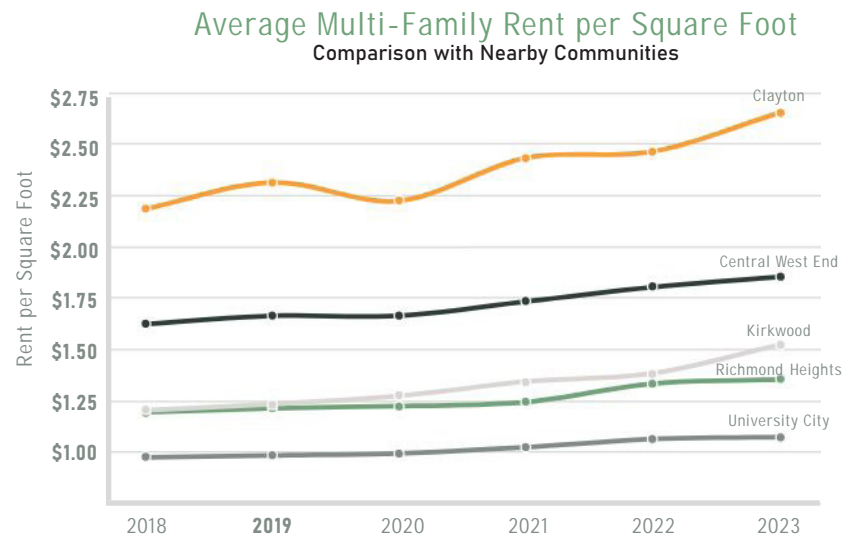


Clayton housing stock is well distributed across differing typologies and levels of density. Just 36% of Clayton’s housing is single-family attached or detached housing, a stark contrast from neighboring communities which ranged from 57% in Brentwood to 100% in Ladue. Small-scale multi-family buildings of 2 to 19 units make up 45% of Clayton’s housing stock and are also relatively well represented among most of Clayton’s neighboring communities, ranging from 16% in Kirkwood to 31% in Richmond Heights. Only Ladue (0%) and Webster Groves (6%) have very limited units of these types. Clayton has significantly more mid-scale and large-scale multi-family units in buildings with more than 20 units than its peers, amounting to 19% of its housing stock. The following table shows the distribution of housing units by the number of units in the building across the nearby communities.



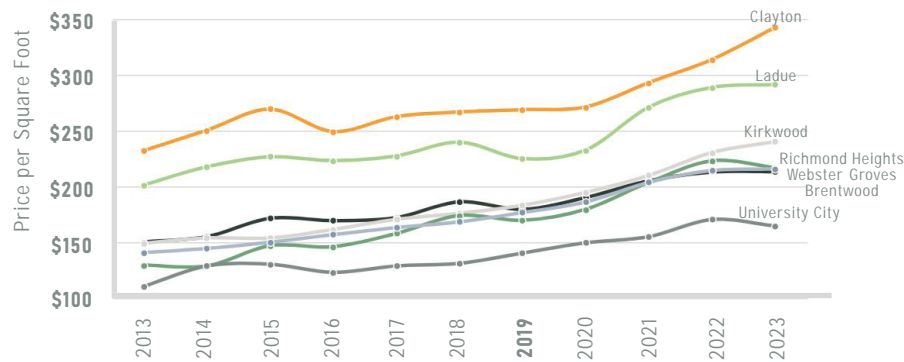
## Rent and Housing Costs

Rental rates in multi-family buildings in Clayton are significantly higher than in other nearby communities, currently averaging about \$2.65 per square foot. In contrast, as shown in the graph that follows, multi-family units in the Central West End in the City of St. Louis average \$1.85 per square foot. Multi-family rental rates in other communities range from \$1.07 in University City to \$1.52 in Kirkwood.



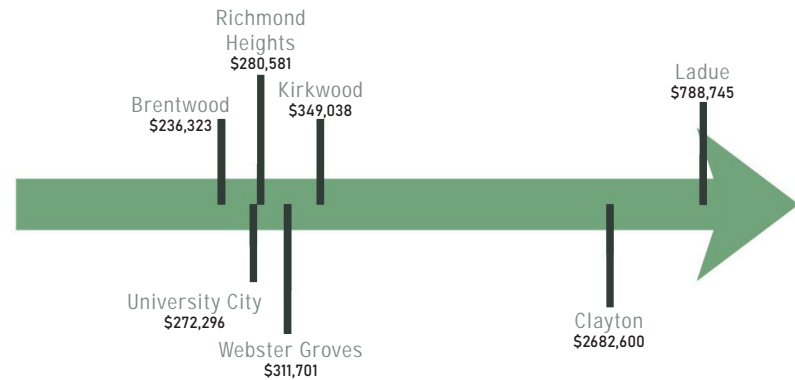
Single-family housing sale prices in Clayton average \$343 per square foot and have been steadily climbing over the last few years. This far exceeds the sale price of all other peer communities, as shown in the following table. Ladue has the second-highest median sale price of \$292 per square foot, while University City has the lowest at \$165 per square foot. The remaining communities have similar sale prices in the range of \$214 to \$241 per square foot. Unsurprisingly, this high sale price also translates to a high median home value of \$682,600.

Median Single-family Home Price per Square Foot  
Comparison with Nearby Communities



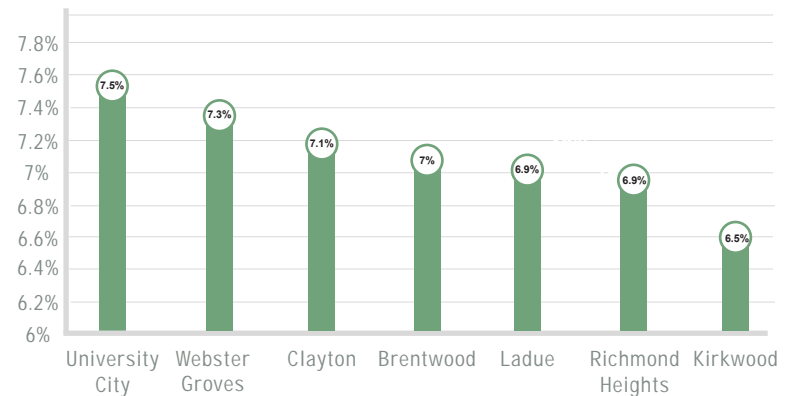
As shown in next chart, this median home value is second only to Ladue, which despite having a lower price per square foot, likely has higher home values due to having larger homes.

Median Home Value  
Comparison with Nearby Communities



Clayton has the third highest residential property tax rate of its neighboring communities. These tax rates can serve as an additional barrier to affordability. For homeowners, these taxes serve as an additional annual expense. For renters, these taxes may be passed through to tenants by landlords in the form of increased rents.

2022 Residential Tax Rate



## Housing Cost Burden

Despite the fact that Clayton has significantly higher rents than its peers, a greater proportion of renters in Webster Groves, Kirkwood, and University City are cost burdened or severely cost burdened than in Clayton. Richmond Heights and Brentwood are more affordable. Since cost burden is a function of both housing costs and income, Clayton's high rental costs appear to be better supported by the higher income of its residents than some of the neighboring communities.

renters who are **COST BURDENED OR SEVERELY COST BURDENED**

**32%** in Richmond Heights

**46%** in Webster Groves

**42%** in Kirkwood

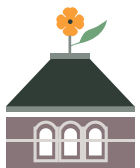
**39%** in University City

**29%** in Brentwood

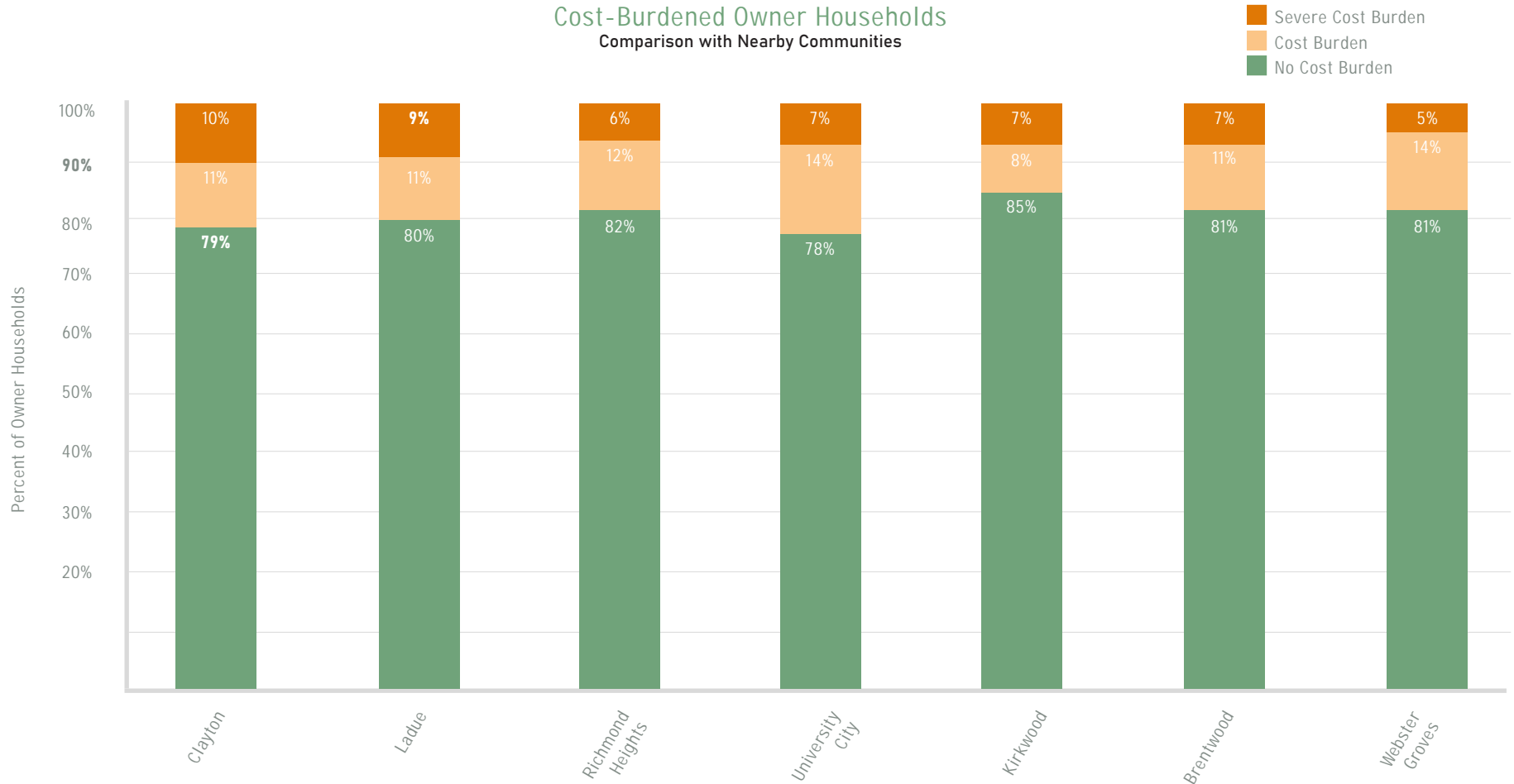
**36%** IN CLAYTON



Ceylon (Apartments.com), Historic Multi-Family (Zillow)



### Cost-Burdened Owner Households Comparison with Nearby Communities



In contrast to its renter households, 79% of Clayton’s homeowners are not housing cost burdened. However, as shown in the table on the following page, compared to the neighboring communities, this is actually a lower percentage than all but University City (78%). Additionally, Clayton has the highest percent of severely cost-burdened households (10%), with Ladue falling just behind at 9%, and the remaining communities ranging from 5% to 7% severely cost-burdened households.

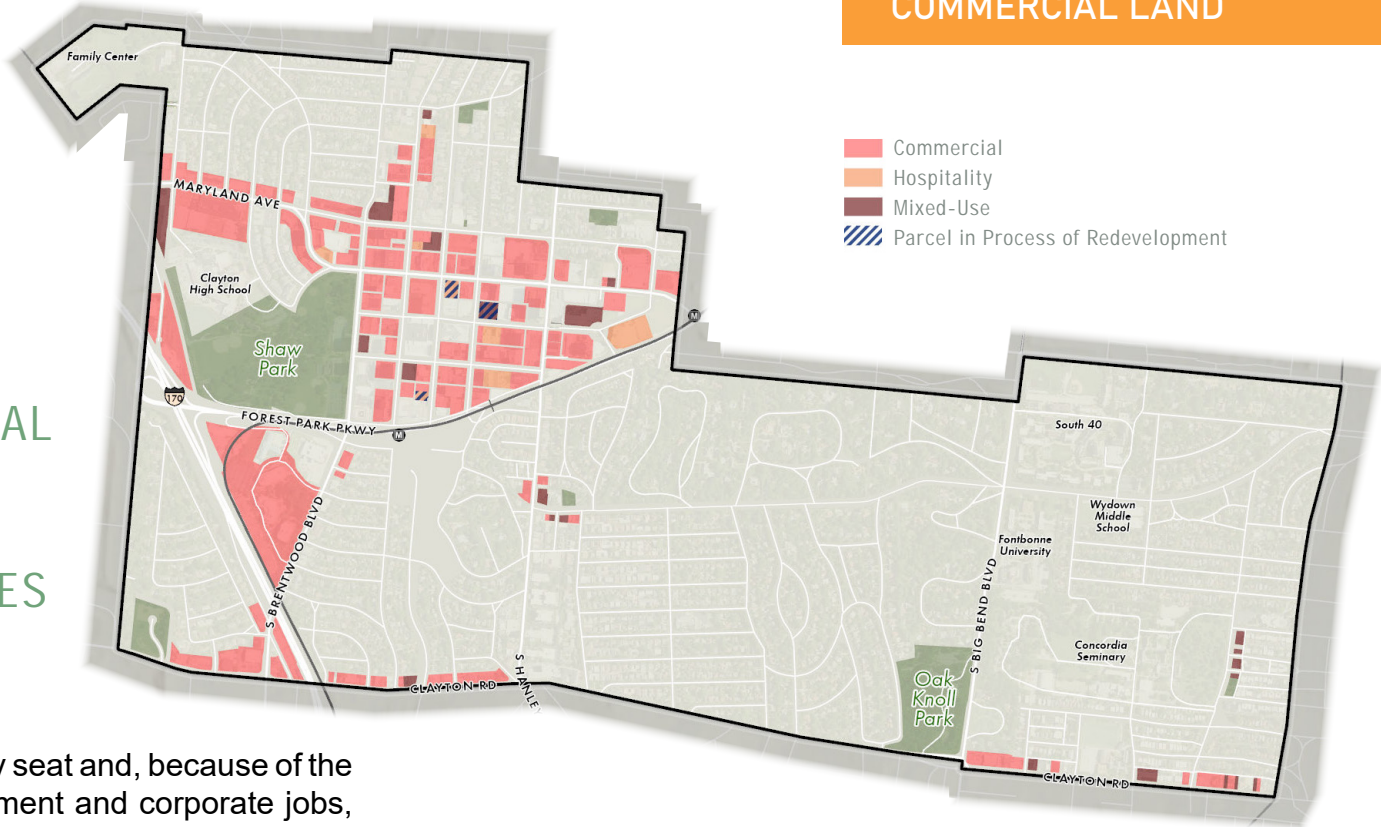


»» COMMERCIAL





8% OF LAND used for COMMERCIAL  
1333 ACRES



Clayton is the St. Louis County seat and, because of the concentration of both government and corporate jobs, serves as a second downtown for the St. Louis region. The area is home to large companies such as Centene, Enterprise Holdings and Commerce Bank, as well as a number of unique, local independent businesses. Because of this, the commercial real estate market has a significant influence on both the City of Clayton and the larger region.

In 1952, the City rezoned the area that is now Downtown Clayton, allowing for larger commercial and retail businesses. A few years later, the City got rid of the building height requirements on new buildings which ushered in several years of significant construction. Today, Downtown maintains a mix of commercial

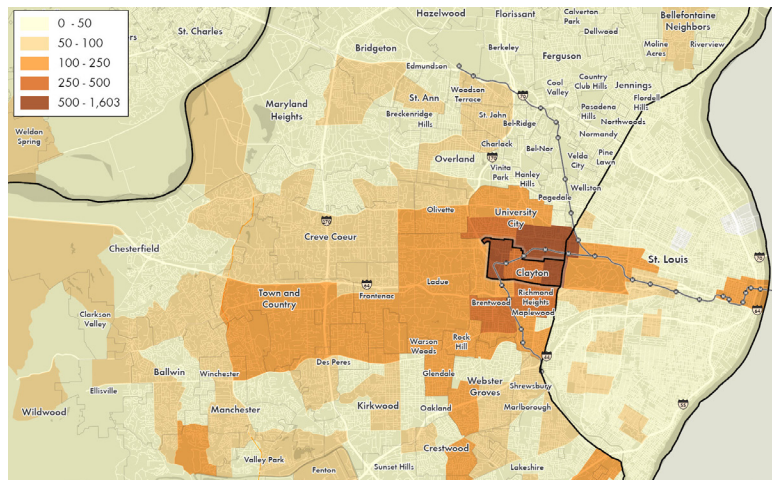
buildings, from one or two story historic brick buildings to modern glass skyscrapers.

### EMPLOYMENT

In 2020, approximately 34,300 people worked in Clayton, a one percent increase from 2015. While the COVID-19 pandemic impacted the area significantly after 2020, it remains a significant job center in the region. As a result, this analysis uses 2020 baseline figures as well as comparison figures to understand the post-pandemic market.



Because of Clayton's position as the County seat and center of much of the corporate life in the St. Louis Region, the community brings in significantly more workers than the population itself supports. As a result, the Clayton workforce largely lives outside of the City. In 2020, 98% of Clayton workers lived outside of the City while only two percent of workers lived in Clayton. The map below displays where workers in Clayton come from each day.



### Clayton Activity Patterns – Effects of the Pandemic

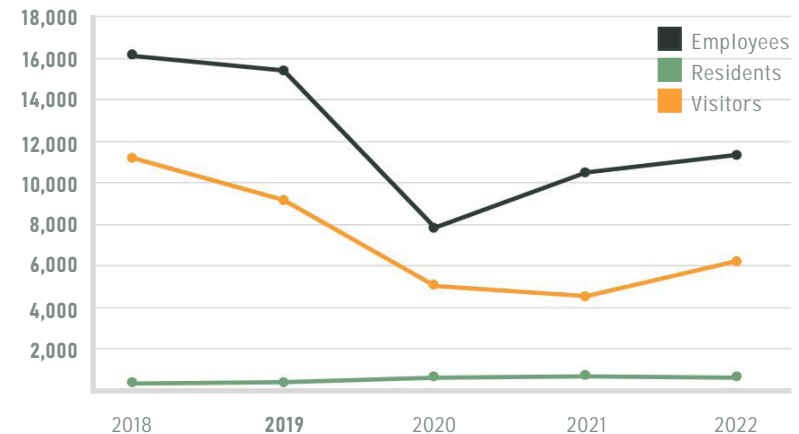
The most recent US Census data on job location dates from 2020, and the emergence of remote and hybrid work arrangements has shifted the location where employees perform work. While more recent data may show that Clayton remains the home site for the same number of workers, a percentage of these

workers may not commute to Clayton daily to fulfill their job responsibilities. This has important implications for office vacancy, as businesses may decrease their office footprint as a result, and also for the retail, restaurant, and service sectors that serve this population.

Data from Placer.AI was used to gain insight into the effects of widespread office and retail closures due to the COVID-19 pandemic. Prior to the pandemic, in 2019, foot traffic counts in the Clayton Central Business District averaged about 25,000 daily visits, with about 62% attributed to non-employee/non-resident visitors, 37% employees, and 1% residents.

In 2020, the number of overall visits dropped by 46%, with large decreases in visitors and employees, but a slight increase in foot traffic from residents. These

Average Daily Visits by Year to Central Business District by Visit Purpose



numbers have increased somewhat since then; however, foot traffic remains low when compared to pre-pandemic years. In 2022, foot traffic from visitors was 73% that of 2019. Non-employee/non-resident foot traffic was 73% as high, employee foot traffic was 68% as high, but foot traffic from residents continued to grow, and was 66% greater than it was pre-pandemic.

It will be important for the City of Clayton to continue watching this trend as pandemic recovery continues and work-from-home arrangements continue to shift.

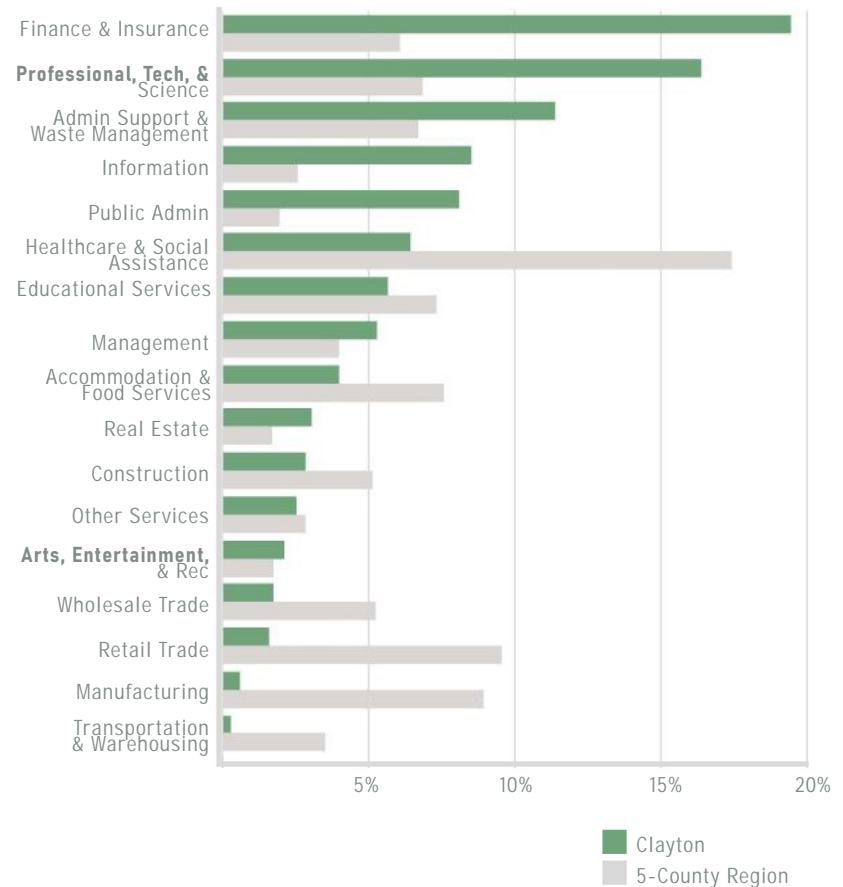
## ECONOMY

The Clayton economy is characterized by a high concentration of professional service jobs, notably jobs in the finance, insurance, technology, science, and information industries. The vast majority of these jobs exist in Downtown Clayton, where office buildings house thousands of workers. Over four in ten (44.4%) jobs in Clayton are in these professional sectors, compared to 15.6% in the St. Louis region. Administrative support accounts for an additional 11% of jobs, compared to 6.7% in the region. Clayton’s role as the county seat is reflected in the higher concentration of jobs in the public sector (8.1% of jobs, compared to 2% of jobs in the region).

Some industries with high representation in the 5-County Region, such as healthcare and social assistance or manufacturing, have a much lower concentration of

jobs in Clayton. This is supported by the land use environment, which supports high-density job uses and lacks space for manufacturing businesses or large hospital campuses.

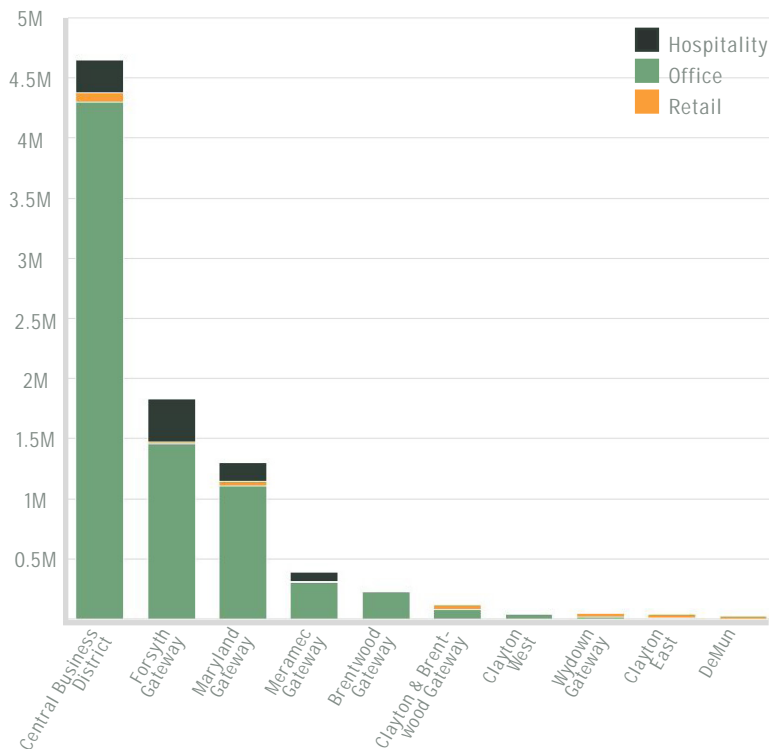
Jobs by Industry



# BUSINESS DISTRICTS

Clayton can be divided into ten business districts, where visitors, residents, and the regional workforce can access a mix of job opportunities, shopping, restaurants, services, and visitor accommodations. These ten districts are shown on the map on the following page, and the total square footage of commercial space by type is shown in the table.

Total Square Feet of Commercial Space  
by Business District



The largest business district is the Central Business District, which contains 4.5 million square feet of office, retail, and hotel space. Office space makes up over 4.3 million square feet of the CBD’s total space and it is one of the region’s largest employment concentrations. Forsyth Gateway, immediately to the east of the CBD, is the second largest business district, with over 1.4 million square feet of office space and a small amount of retail space. Maryland Gateway, to the west of the CBD, is the third largest, with 1.2 million square feet of office, retail, and hotel space. The largest business districts in terms of retail space are the CBD (77,000 square feet), and the Clayton & Brentwood Gateway (41,500 square feet).

As the diagram on the following page displays, visitation varies widely in the various commercial areas across the City. The Central Business District has seen the highest average monthly visitation since January of 2017, at 627,000 with a peak of 942,000 in October of 2018. This dropped to under 200,000 in April of 2020, but has returned to 623,000 as of June 2023. The lowest visitation is in the DeMun area at just 19,000. That being said, the DeMun area has bounced back the strongest, at 96% of the highest monthly visitation since 2017 and the June 2023 visitation at more than 30,000. Most areas are between 65-75% of peak visitation as of June 2023.

*Data was unavailable for the Brentwood Gateway Business District.*



**Maryland Gateway**  
 avg monthly visitation - 102k  
 peak visitation - October '18 | 140k  
 current - 71% of peak

**Meramec Gateway**  
 avg monthly visitation - 37k  
 peak visitation - September '18 | 56k  
 current - 74% of peak

**Central Business District**  
 avg monthly visitation - 627k  
 peak visitation - October '18 | 943k  
 current - 66% of peak

**Forsyth Gateway**  
 avg monthly visitation - 111k  
 peak visitation - August '18 | 174k  
 current - 55% of peak

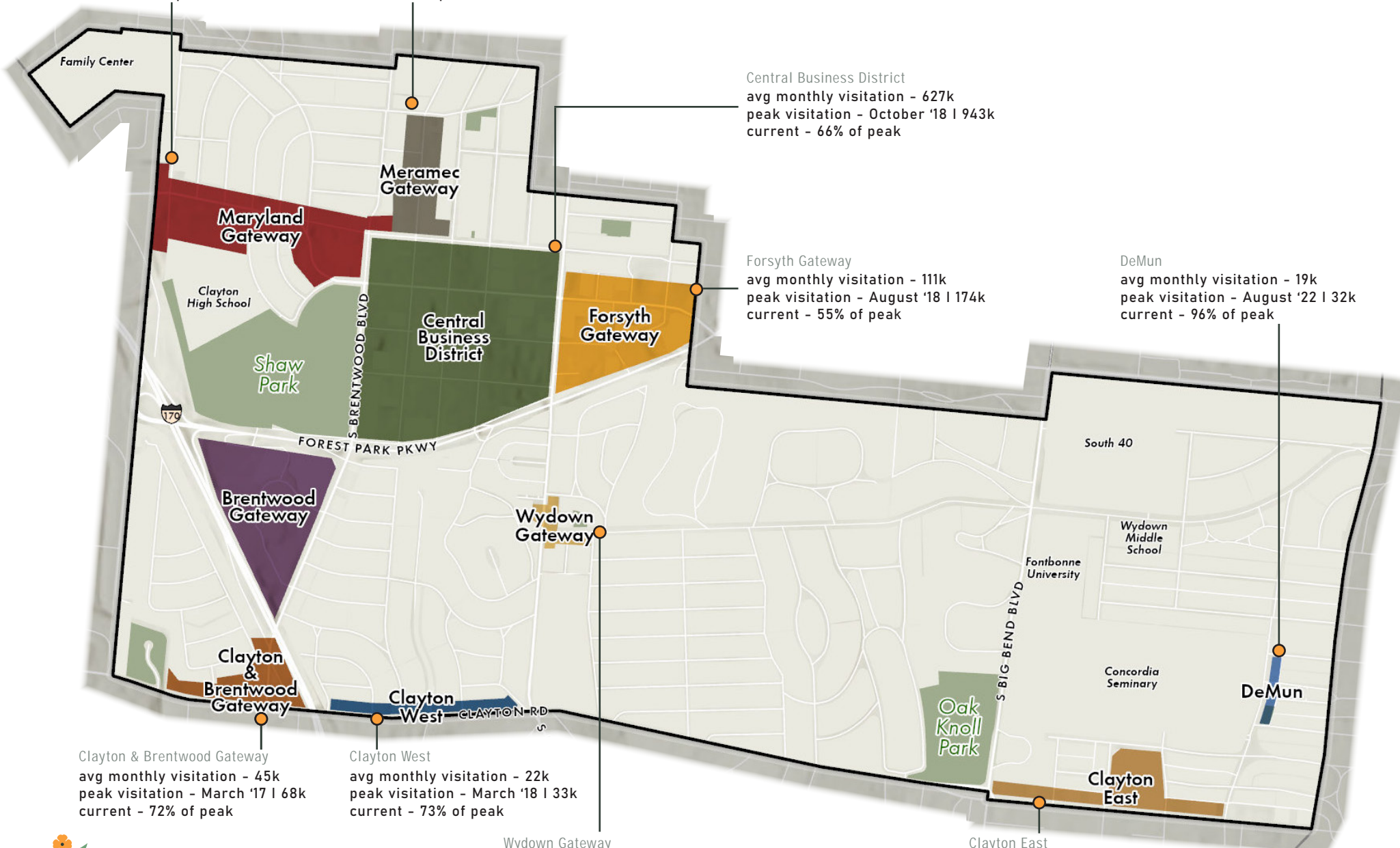
**DeMun**  
 avg monthly visitation - 19k  
 peak visitation - August '22 | 32k  
 current - 96% of peak

**Clayton & Brentwood Gateway**  
 avg monthly visitation - 45k  
 peak visitation - March '17 | 68k  
 current - 72% of peak

**Clayton West**  
 avg monthly visitation - 22k  
 peak visitation - March '18 | 33k  
 current - 73% of peak

**Wydown Gateway**  
 avg monthly visitation - 24k  
 peak visitation - January '19 | 37k  
 current - 63% of peak

**Clayton East**  
 avg monthly visitation - 43k  
 peak visitation - September '22 | 63k  
 current - 78% of peak



# COMMERCIAL MARKET

## Office

Clayton is home to approximately 7,242,100 square feet of office space. Eleven of the largest office buildings in Clayton are listed below, with their size, major tenants, year built, occupancy, and asking rent.

The high proportion of professional service jobs in Clayton is both a result and driver of the office market in Clayton. However, office-based jobs were also the most affected by pandemic shifts in work location, particularly the large increase in remote working arrangements. This trend has affected downtowns nationally, who have struggled to backfill vacancies in office and retail space that once served a large daytime employee population.

Building	Major Tenants	Size	Year Built	Year Renovated	Occupancy	Asking Rent
Centene Plaza C	Bank of America Mortgage, Rubin Brown	662,500	2019	-	78%	\$42.50
Forsyth Pointe / Emerson Tower & Clayton Tower	Emerson Electric, Commerce Bank	550,000	2023	-	100%	Unk.
Centene Plaza	Centene, Armstrong Teasdale	500,000	2010	-	99%	Unk.
Pierre Laclede Center (7733 Forsyth)	Morgan Stanley, Wipfli, Harbour Group	362,100	1970	2008	77%	\$23.50 - \$32.00
Hanley Corporate Tower	Ascension, Wash. University, BDO	360,500	1986	-	91%	\$25.00 - \$32.00
The Plaza in Clayton	Olin Corporation, JAMS	340,500	2001	-	46%	\$38.75
Regions Centre	Buckingham Strategic Wealth, Regions Financial Corp.	337,000	1986	1994	89%	Unk.
PNC Center	Carmody Macdonald, PNC Bank	301,600	1985	1998	88%	\$29.50
Pierre Laclede Center (7701 Forsyth)	Lathrop GPM, St. Louis Trust	217,700	1964	2008	57%	\$32.00
8235 Forsyth Blvd	Apex Oil Company	217,600	1999	-	84%	Unk.
Clayton Corporate Park I	Enterprise (HQ)	210,700	1990	-	100%	Unk.

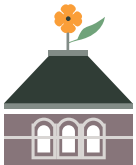
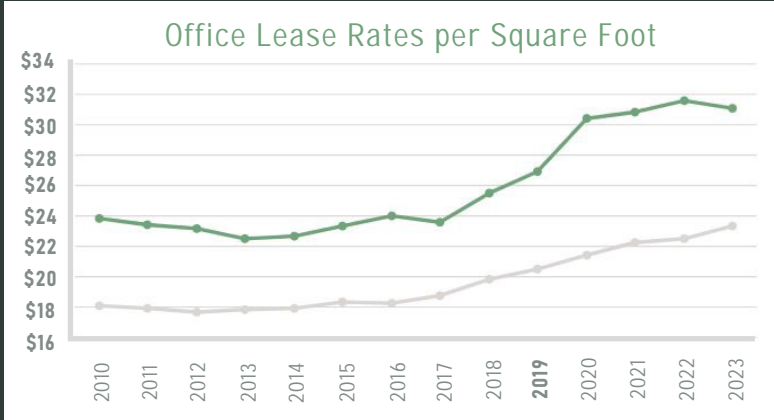
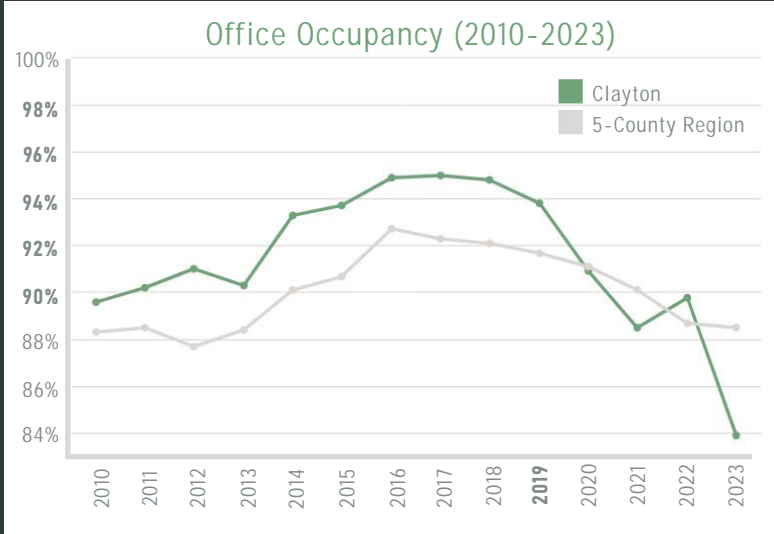


The weighted average occupancy of Clayton's eleven largest office buildings, which total over 4 million square feet of space, is currently 83.9 percent, with just over 650,000 available square feet in July 2023. This is similar to the overall office occupancy rate in Clayton, which was 84 percent as of June 2023.

Traditionally, Clayton has enjoyed higher office occupancy than the 5-County Region, as shown in the table. Office occupancy peaked in Clayton in 2017, at 95 percent. In 2019, Centene Plaza C was completed and added over 650,000 square feet of office space, which increased the office inventory in Clayton by 9 percent. From 2019 to 2021, occupancy decreased from 94 percent to 89 percent before increasing slightly. However, in 2022, Centene announced that it was decreasing its regional office footprint by about one million square feet, which included a large portion of its space in its Clayton buildings. This, along with other office closures, resulted in a decrease in office occupancy to 84 percent in 2023.

Clayton has also commanded higher lease rates for office properties, likely due to the quality of the location as well as the overall higher quality of buildings. Sixty one percent of office square feet in Clayton are located in Class A buildings, compared to 33 percent in the 5-County Region. On average, office lease rates have ranged between \$6.00 and \$8.00 more per square foot in Clayton than the regional average. The opening of Centene Plaza C in 2019 added 662,500 additional

square feet of Class A space to the Clayton market, increasing the average lease rate in the City. In 2023, the average lease rate per square foot in Clayton was \$31.10, compared to \$23.35 in the region.

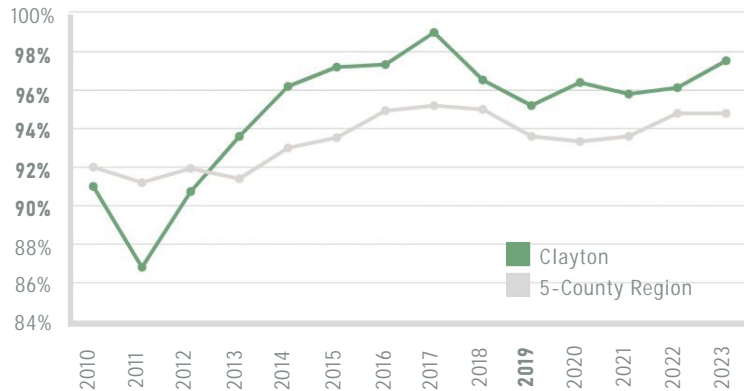


## Retail

Clayton is home to about 355,000 square feet of retail space. The majority of this retail space consists of small storefront spaces in historic retail buildings or on the ground floor of buildings in the CBD. Types of retail prevalent in nearby communities, such as strip retail, big box stores, and malls, are largely absent in Clayton.

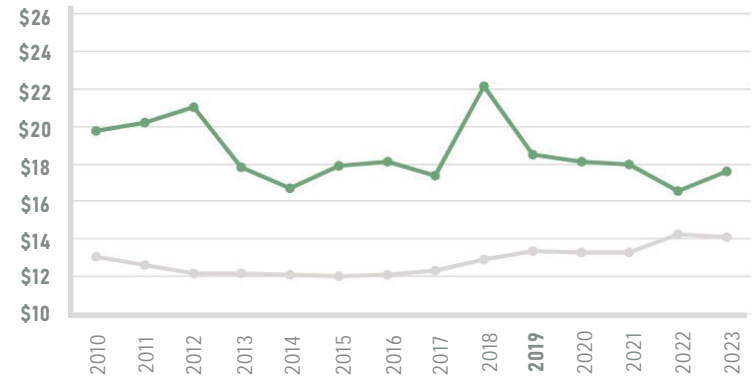
Overall, retail occupancy is higher in Clayton than in the 5-County Region. One exception was in 2011, when Borders closed their 53,000 square foot location in a former department store building. Since 2013, retail occupancy would be considered high, with occupancy generally exceeding 95 percent. During this time, the inventory of retail space in Clayton has been generally stable. The City lost approximately 22,000 square feet of retail space between 2020 and 2021.

Retail Occupancy (2010-2023)



Like office, retail spaces lease at a premium compared to the 5-County Region. Since 2010, lease rates per square foot have been, on average, \$5.75 higher per square foot than within the 5-County region.

Retail Lease Rates per Square Foot



Overall, the retail market would be considered healthy, with high occupancy, and with lease rates that indicate that retailers are willing to pay a premium to locate in the City. Despite the drop in foot traffic from increases in remote work, retail space in Clayton remains in high demand. This is likely because there is broad demand for Clayton's restaurants, retailers, coffee shops, and other businesses from demographics in addition to the professional workforce that has been able to sustain business during the downturn.





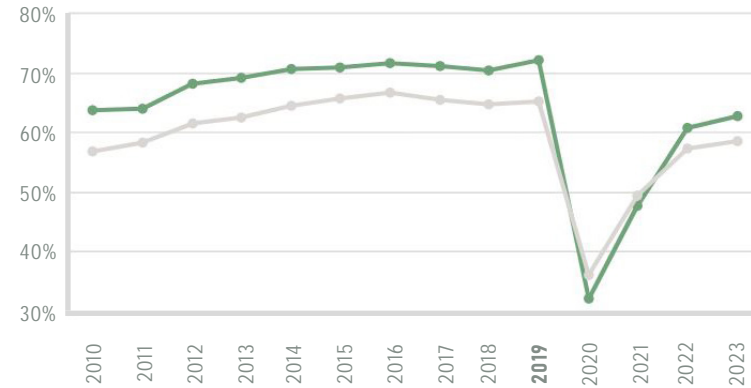
## Hotel

There are 1,117 hotel rooms in Clayton in six hotel properties. A seventh, a 245-room property, is currently proposed.

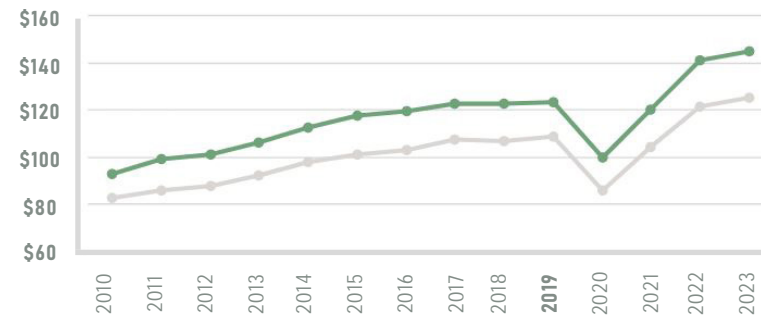
The Clayton hotel market compares favorably to the 5-County Region in terms of average daily rate and occupancy. On average, hotel rooms in Clayton command about \$15 more per night than the regional average. However, it should also be noted that all of Clayton's hotels falls into the "upper midscale" or higher quality range, which also influences daily rates. However, occupancy rates show that, despite this price premium, visitors find the City to be an attractive place to stay. On average, Clayton hotels have had occupancy rates 4 percent higher than the regional average since 2010.

The hotel business was seriously disrupted in 2020 and 2021, and though traveling has resumed, Clayton and the 5-County Region have not yet attained occupancy levels on par with pre-pandemic levels. As of June 2023, Clayton's average occupancy was 63 percent, compared with 72 percent in 2019. However, with the addition of new rooms, if occupancy remains at 63 percent for the remainder of the year, the total number of room nights stays in 2023 will be the highest they have been during the 2010-2023 period.

Hotel Occupancy (2010-2023)



Average Daily Rate per Hotel Room



Clayton Plaza Hotel



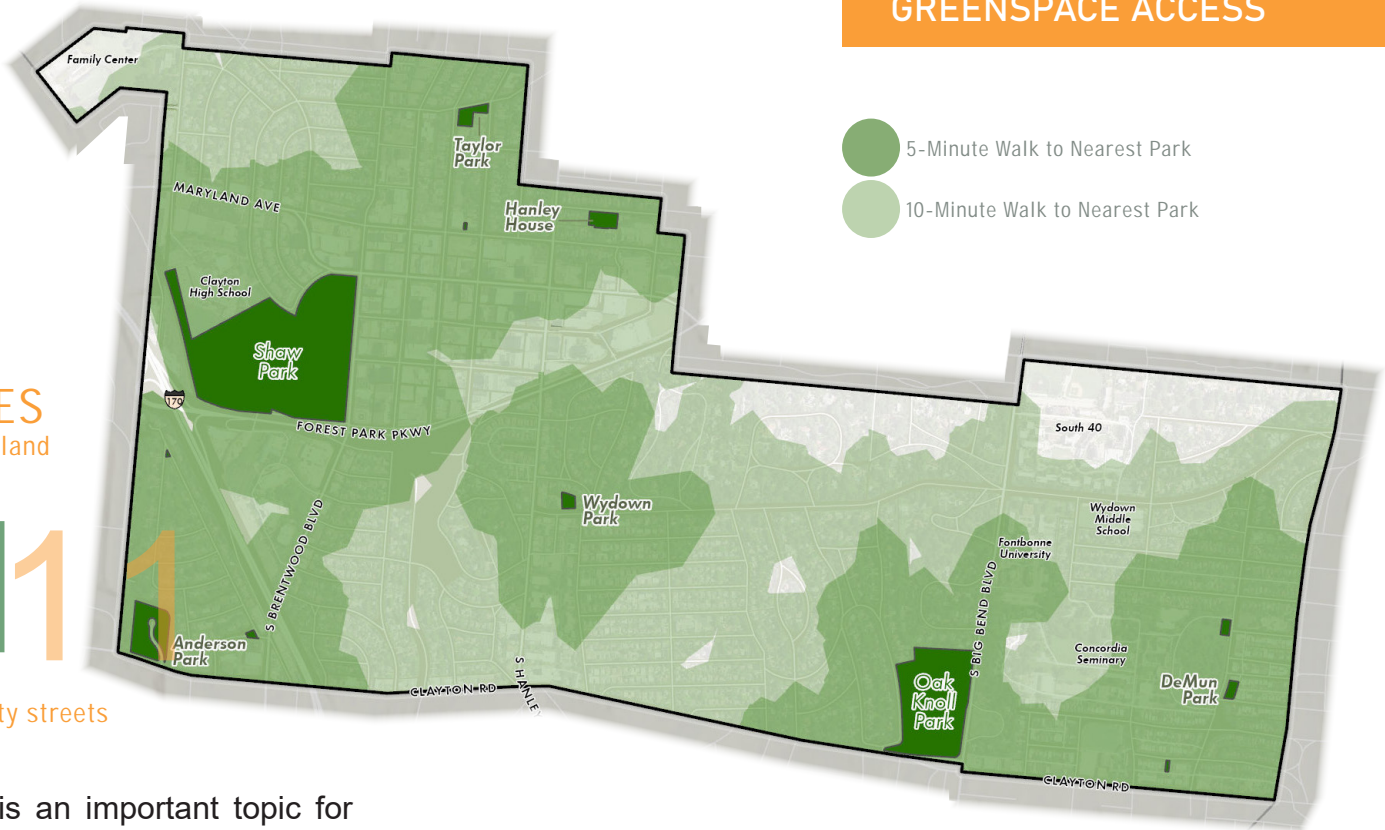
A person wearing a bright blue long-sleeved shirt and black shorts is running away from the camera on a dirt path. The path is bordered by lush green grass and a dense line of trees with vibrant green leaves. To the right of the path is a paved road with a yellow curb, where several cars are visible in the distance. The scene is captured in a soft, natural light, suggesting a pleasant day for outdoor activity.

»»» GREENSPACE &  
THE ENVIRONMENT

122 PARKS

79.88 ACRES of park land

10,211 TREES on city streets



- 5-Minute Walk to Nearest Park
- 10-Minute Walk to Nearest Park

Environmental sustainability is an important topic for the City of Clayton and its residents. With significant access to greenspace and a focus on high quality parks and recreation assets, the City has continued to excel in this area. Today, the City is home to 12 parks, 79.8 acres of park land, about 1,700 trees located in parks, and about 8,300 trees on City streets. In addition, the Centennial Greenway connection from Shaw Park provides direct access to the regional trail system. As the map above displays, nearly all residents in Clayton have access to a park within a 10-minute walk, and many have a greenspace within 5-minutes.

In addition to physical assets, the City has a variety of initiatives aimed toward creating a more sustainable and natural environment. On the following pages is a review of the natural resources within and impacting the Clayton. In addition, a review of the community’s hazard risk and resiliency has been conducted. This data provides a baseline understanding of greenspace and the environmental assets and constraints impacting the City and its residents.



# Natural Resources & Greenspace Assets

## Parks & Greenspace

### Shaw Park

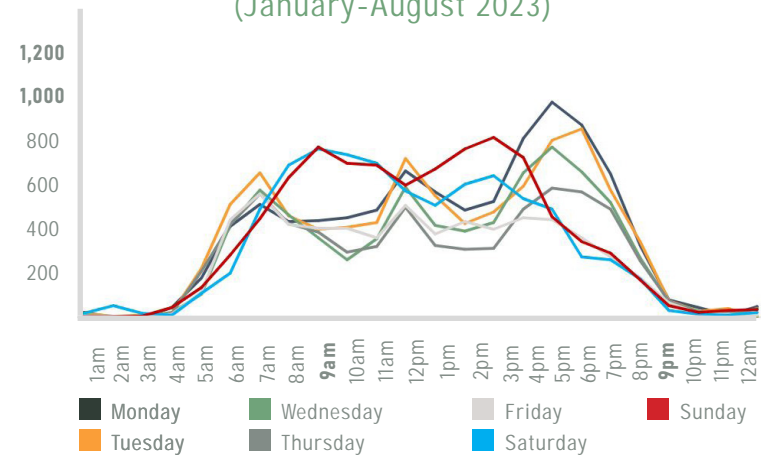
Shaw Park is Clayton’s largest park, occupying the area just west of Brentwood Boulevard and bound by Forest Park Parkway to the south. As the City’s oldest park, it includes significant greenspace and mature trees, providing welcoming spaces to residents and visitors. In addition, the Park includes significant amenities including rentable spaces such as Chapman Plaza, the Enterprise Holdings Pavilion, as well as small picnic spaces. Treetop Playground and Sensory Garden provide inclusive spaces to enjoy. The Park is also home to recreational facilities including the Aquatic Center, an outdoor ice-skating rink, tennis courts, baseball fields, and sand volleyball courts. The Park is located adjacent to busy Downtown Clayton and is home to a Centennial Greenway trailhead, connecting the park north to Olive.

### Centennial Greenway

The Centennial Greenway links Clayton, University City, Ladue, and Lafayette with an off-street connection for bicyclists and pedestrians. The greenway begins at Shaw Park and stretches north for 2-miles adjacent to I-170, to Olive Boulevard. Managed by Great Rivers

Greenway, the connector provides a safe connection for Clayton residents, from Shaw Park to adjacent communities. From January to mid-August of 2023, the greenway saw more than 70,000 visits. The graph below shows usage by day of the week and time of day and displays trends in the early morning and evening rush hour during the week and a more consistent daytime usage on weekends.

Visitation at the Centennial Greenway at Shaw Park (January-August 2023)

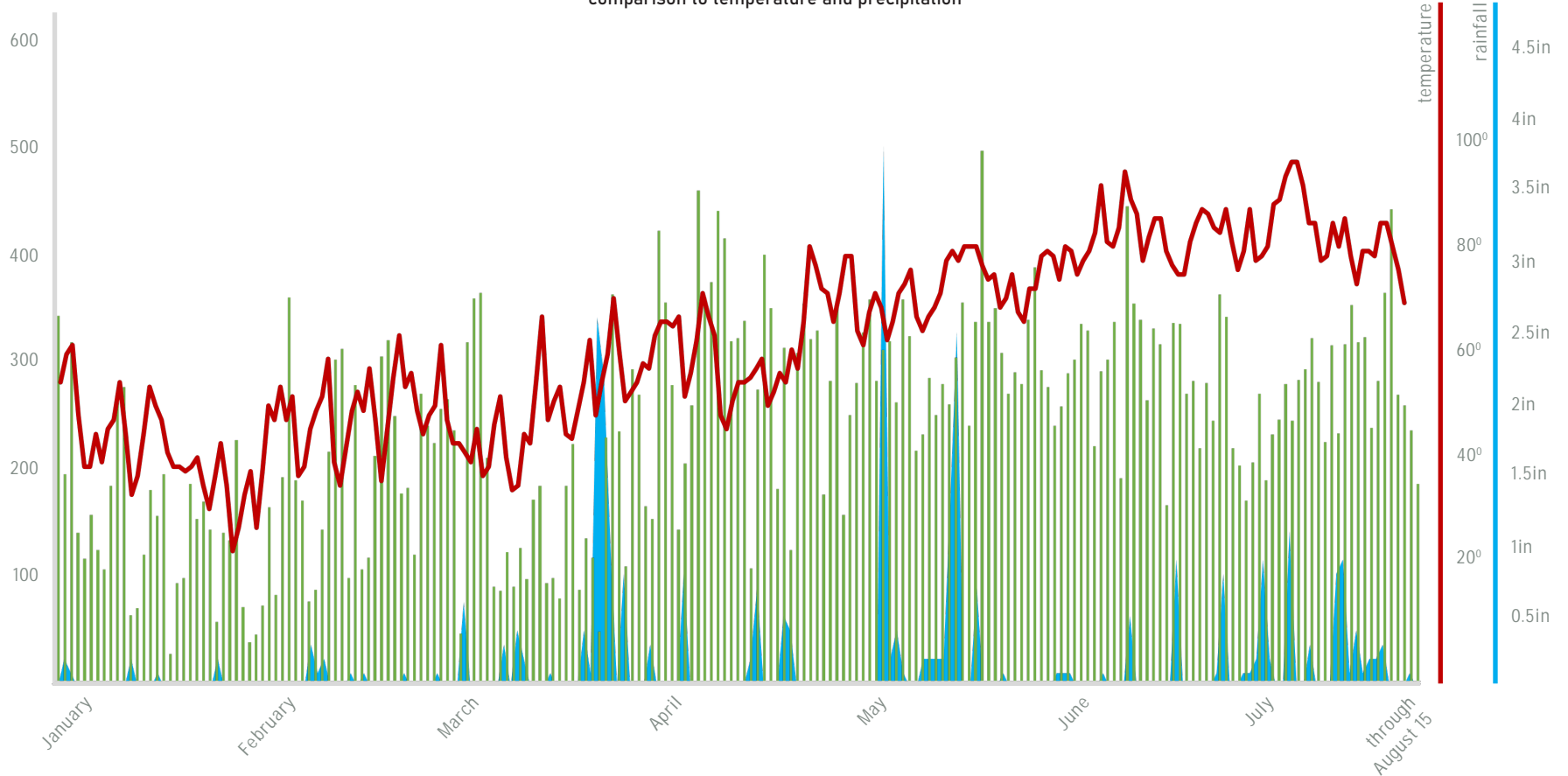


### Oak Knoll Park

Oak Knoll Park is located at the southern edge of Clayton at the corner of Clayton Road and Big Bend Boulevard. The park includes over 14 acres of park space and includes picnic sites, a large playground, restrooms, and large pond. In addition, the park includes a half-mile walking path. Two stone buildings are located within the park, now home to the Greater St. Louis Community Foundation and the Clayton Early Childhood Center.



### Visitation at the Centennial Greenway at Shaw Park (January-August 2023) comparison to temperature and precipitation



The graph above depicts daily visits to the Centennial Greenway at Shaw Park (shown in green) as they compare to the recorded weather in 2023. As this chart makes clear, there is an increase in visitation during the summer and the temperature does not seem to impact usage. Rainfall, shown in blue appears to impact usage in a seasonal manner, with a clear impact on daily visits in the Spring, though day-to-day trends do not appear impacted by rain events.



### **Other Parks**

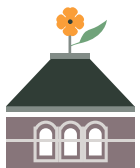
Other parks in Clayton include Anderson Park, which includes a dog park, Clayshire Park, Concordia Park, Taylor Park, Whitburn Park, Wydown Park, and Henry Wright Park. Other small scale neighborhood parks include DeMun Park and Hanley Park, both of which include restrooms, picnic tables, and a Little Library. In addition, the City is currently in the process of creating a new park next to the St. Louis County Mid-County Library Branch. Remembrance Park on Maryland Avenue will be completed soon.

### **Watersheds**

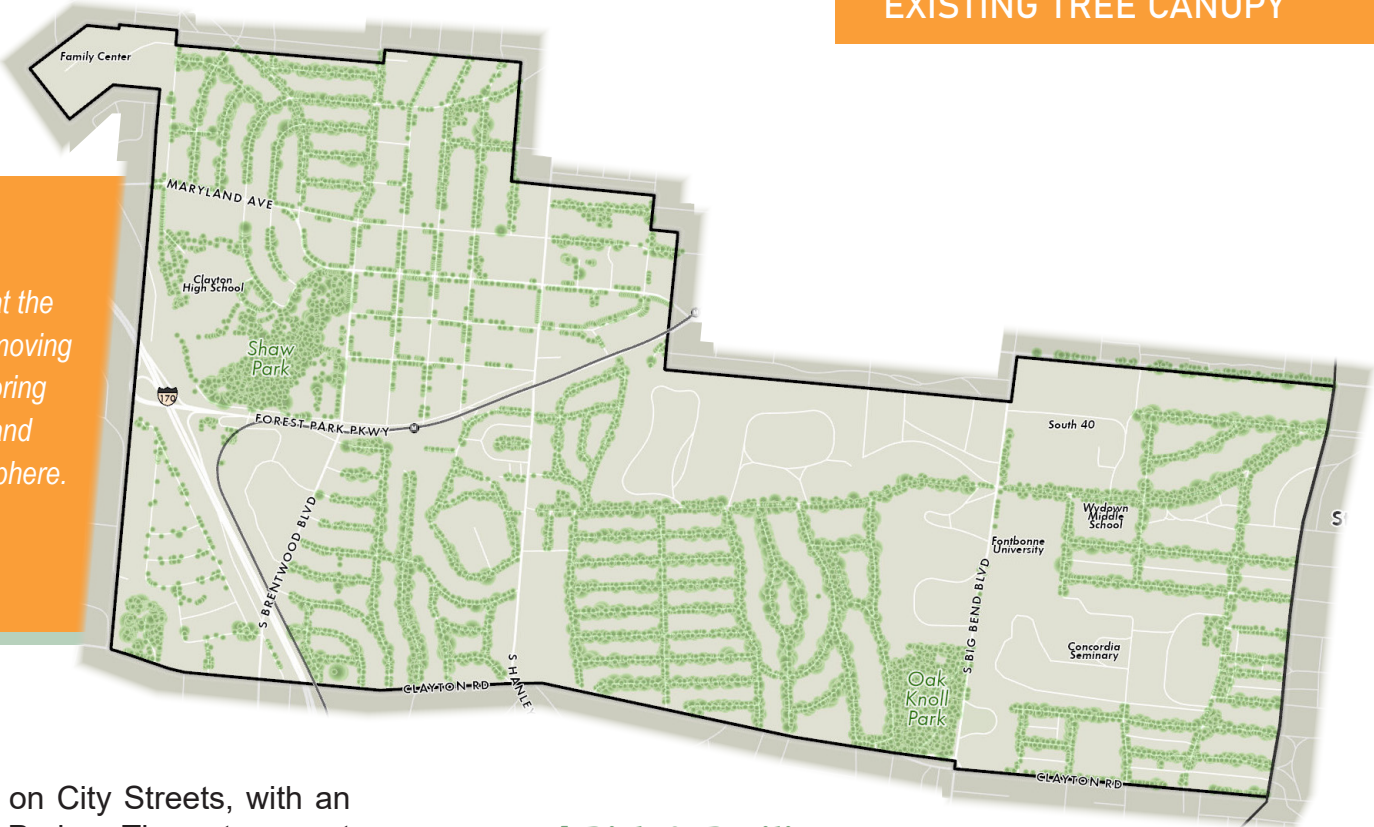
Watersheds are the boundaries that determine which stream and river rainwater will drain to. Clayton straddles two watersheds: the University City Branch of the River Des Peres and the Deer Creek Watershed. There are essentially no streams within the City of Clayton, but water will eventually run off from impervious surfaces such as buildings, parking lots, and roadways into storm sewers, which empty into streams and rivers. Both the stormwater and sanitary sewer systems in Clayton are managed by the Metropolitan St. Louis Sewer District. The amount of pavement in the City, discussed elsewhere in this report, has a significant impact on this runoff and the eventual impact on watersheds.



DeMun Park, Henry Wright Park



As trees grow, they help combat the impacts of climate change by removing carbon dioxide from the air, storing carbon in the trees and soil, and releasing oxygen into the atmosphere.  
Arbor Day Foundation



Trees

Over 8,300 trees are located on City Streets, with an additional 1,700 trees in City Parks. These trees not only add to the greenspace and beauty of the City, but increase the shade coverage and reduce greenhouse gas emissions.

Water

The City of Clayton provides residents access to clean water through Missouri American Water. In 2022, the community used 853,198,896 gallons. This reflects a small increase from the past two years.

Hazard Risk & Resiliency

According to FEMA’s Hazard Risk and Resiliency Scoring framework, St. Louis County is less susceptible, on average, to environmental hazards and better equipped to respond to them. Weather and climate related risks, such as heat waves and severe weather, are the principal risks facing the County. Earthquakes are also at an above-average risk because of the presence of the New Madrid fault.

31.66 ENVIRONMENTAL HAZARD NATIONAL RISK INDEX SCORE, ST. LOUIS COUNTY

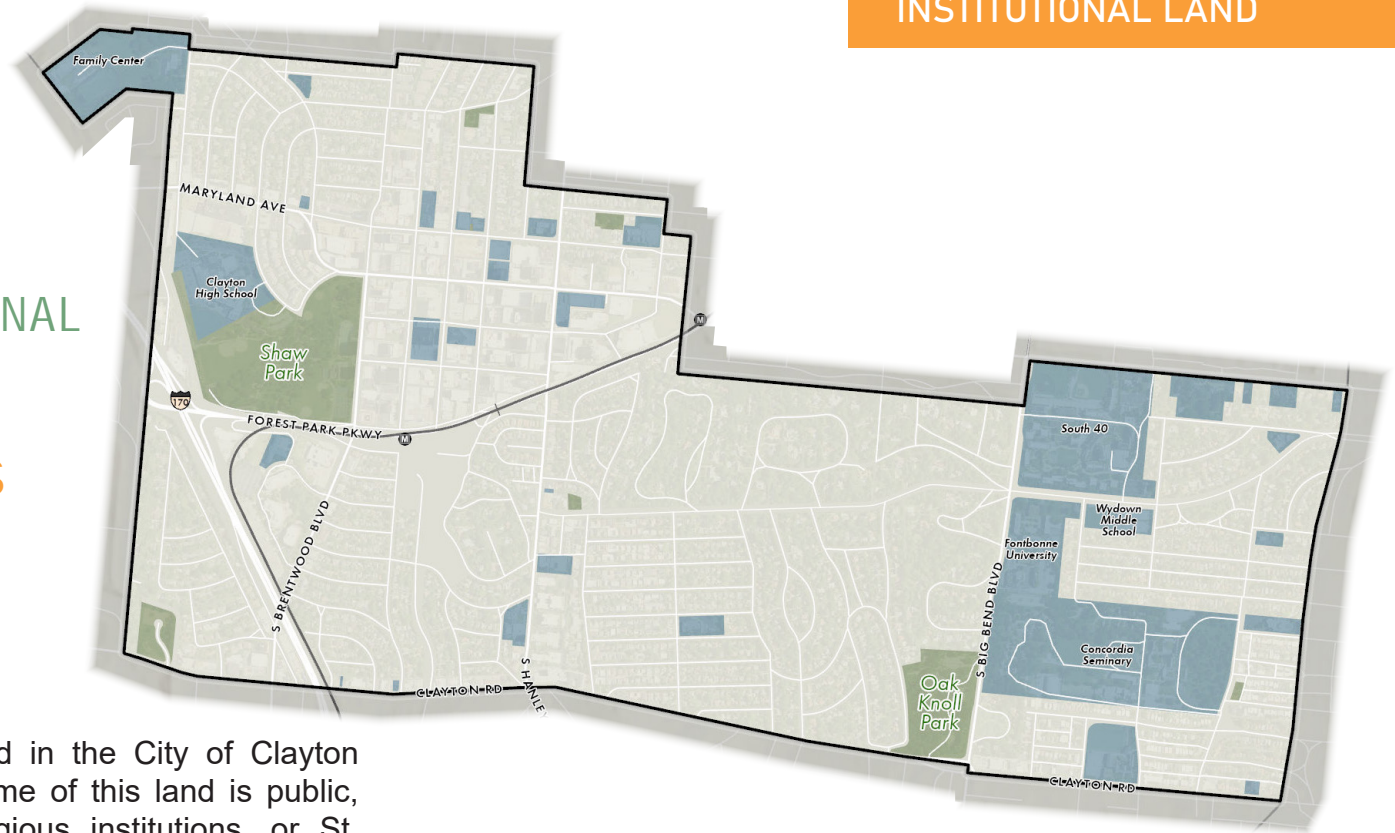


»»» INSTITUTIONAL





15%  
of all land in Clayton  
IS INSTITUTIONAL  
accounting for  
2,388 ACRES



A significant amount of land in the City of Clayton is institutionally owned. Some of this land is public, such as area schools, religious institutions, or St. Louis County government buildings. Other land, like the South 40 Campus of Washington University or Concordia Seminary operates differently.

Over 30% of the land in Clayton east of Big Bend Boulevard. is used for institutional purposes, with the vast majority as higher education. Washington University, Fontbonne University, and Concordia Seminary all have significant campuses in this area and occupy much of the land fronting Big Bend. Residential areas are tucked just to the east.

Another significant institutional user is the Clayton School District, which includes Clayton High School, Gay Field and the Family Center, Wydown Middle School, and several elementary schools. Several religious institutions and City and County Buildings occupy other land in the City.

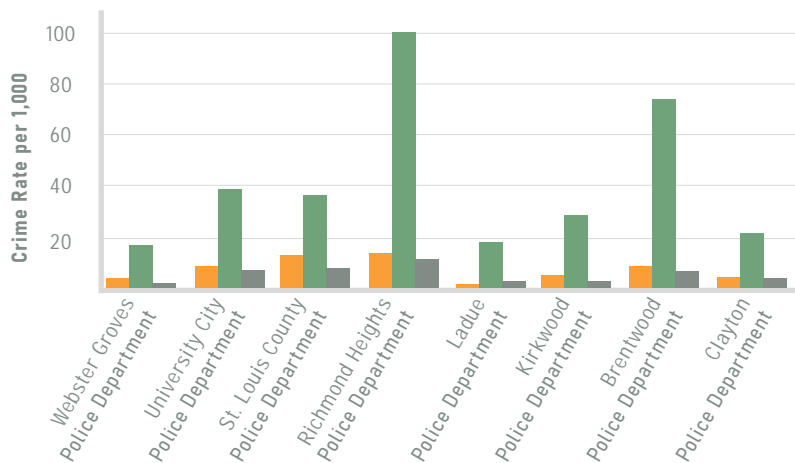
Institutional land uses are very stable, often providing services or amenities to the broader community. This is the case for many of the users in Clayton. That being, most institutional land uses do not pay property taxes, impacting the revenue potential of Clayton.



# PUBLIC SAFETY

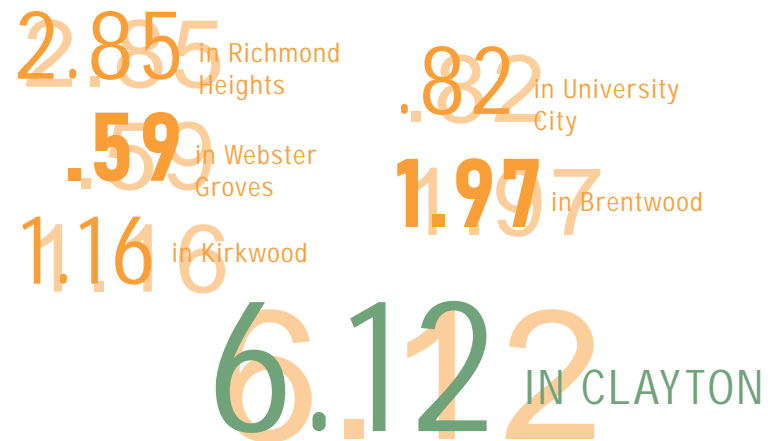
The City of Clayton has a low crime rate relative to nearby communities. In 2022, the crime rate in Clayton was 29.6 per 1,000 people. Seventy three percent of these crimes were property crimes. The figure below shows how the overall crime rate in Clayton compares with nearby cities. Only Ladue and Webster Groves had crime rates that were overall lower than Clayton. Kirkwood also had lower rates of crimes against person and society than Clayton.

**Crime Rate per 1,000 People**  
by Police Department & Offense Type  
Comparison with Nearby Communities



To further investigate crime rates in Clayton as compared to nearby communities, an analysis of location of crime was conducted. When considering the crime rate in residents or homes, Clayton is lower than all comparison geographies. Similarly, in Commercial buildings, Clayton's rate is on par with that of Kirkwood, Ladue, St. Louis County, and Webster Groves. Brentwood and Richmond Heights see significantly higher crime rates, likely due to the high amount of commercial land use both communities have. Things like shoplifting would be counted in this category and therefore increase the numbers significantly. For crimes taking places on roads and parking lots, Clayton falls below Brentwood, Richmond Heights, St. Louis County, and University City, but has a slightly higher rate than Kirkwood, Ladue, and Webster Groves.

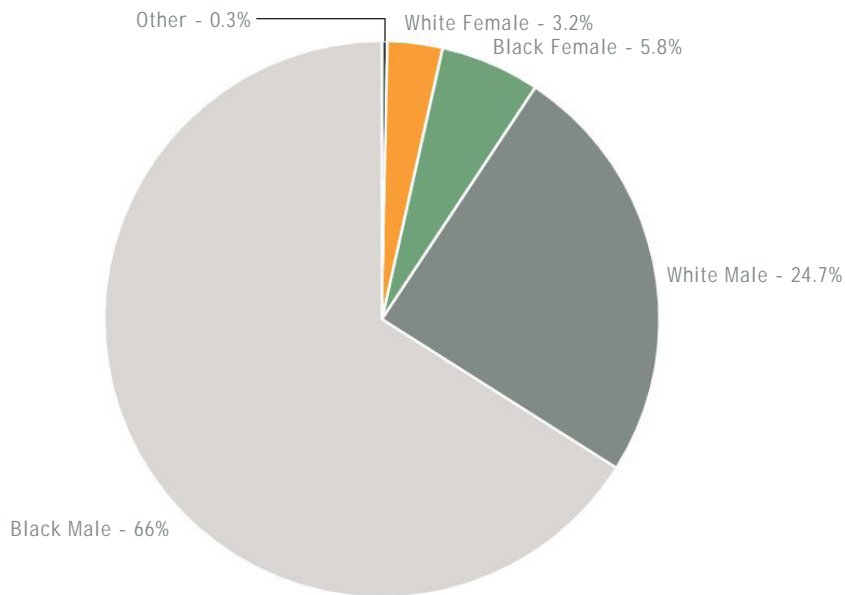
Clayton's crime rate only far exceeds its peers in crimes occurring in government or public buildings, primarily due to crimes occurring within the St. Louis County Jail.



### St. Louis County Jail

The St. Louis County Jail is located within Clayton and currently has a total capacity of 1,250 people. The average daily population of the jail in August 2023 was 1,009 people. The jail population declined during the COVID-19 pandemic as a result of additional regulations regarding density of inmates. This is consistent with national trends. Following the restrictions on density being lifted, the jail population has steadily increased. However, the jail's current population still remains below pre-pandemic levels. Over the last twelve months, the average length of stay in the jail was 69 days.

### St. Louis County Jail Population Demographics



St. Louis County Justice Services



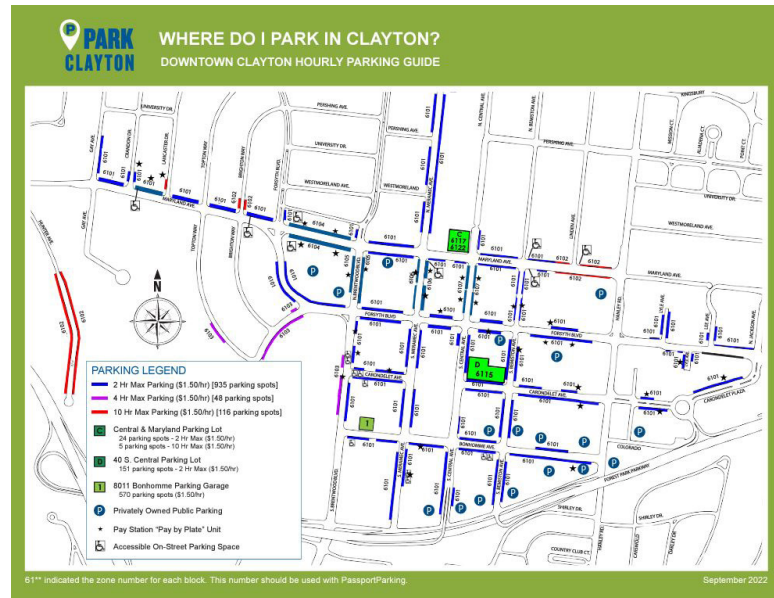


»»» PARKING

## Parking Inventory

Clayton has a significant amount of parking located on private lots, in garages, and on public streets. The 2015 Parking Study identified more than 15,000 available spaces.

In Downtown Clayton and other commercial districts of the City, paid street parking is available for visitors. This parking is \$1.50 per hour and paid through pay stations, meters, or the PassportParking app. Length of time allowed varies by area, with some parts of Downtown allowing 2-hours or less and others up to 10-hours. This parking is free after 5pm and on weekends.



Elsewhere, private lots and garages provide significant parking inventory for workers and visitors, particularly in Downtown Clayton. Given that parking demand is driven by office workers, during evening and weekends, occupancy rates are significantly lower. Despite this, there is consistent feedback from residents and visitors that parking could be more convenient or easier to locate.

The 2015 Parking Study found that there are significant parking space vacancies in the Downtown area during typical peak weekday business hours, weekday evenings, and weekends.

In residential areas, Clayton offers a Residential Parking Program to ensure that residents are afforded the first opportunity to utilize on-street parking spaces in the immediate vicinity of the homes. This program registers resident vehicles and allows for unrestricted street parking in certain areas.

## Parking Regulations

Currently, parking requirements vary by use, with some requirements indicating a number by use or size and other calculated using floor area ratios and number of floors. The Parking Study recommended updating the parking requirements for businesses based on business-type and current available parking nearby. Additional analysis of parking assets, needs, and regulatory changes will be conducted.





# TRANSPORTATION

9.5 million square feet OF PAVEMENT

72% of pavement MAINTAINED BY THE CITY OF CLAYTON



Transportation planning is a key component of Clayton’s comprehensive plan, as it affects the mobility, accessibility, safety, and quality of life of the residents and visitors of the City. The transportation system in Clayton consists of various modes, such as roads, sidewalks, trails, transit, and bicycle facilities, that serve different travel needs and preferences.

## Transportation Assets

### Roadways

As the map above displays, the City of Clayton includes a connected street grid in the Downtown area, significant major roadways throughout the community, and a suburban-style roadway network for much of the residential area.

There is nearly 10 million square feet of roadway pavement in the City of Clayton. This pavement is owned and maintained by a variety of groups including:

- 71.7% - City of Clayton
- 18.3% - St. Louis County
- 5.7% - Private
- 4.2% - Missouri Department of Transportation (MODOT)
- 0.1% - Clayton School District



“  
Sidewalks provide many benefits including safety, mobility, and healthier communities.  
US Department of Transportation  
”



**Sidewalks and Curb Ramps**

As the map above displays, the City has a robust network of sidewalks across the community. Where the City of Clayton owns the roadways, sidewalks and ADA curb ramps nearly always exist. These areas include Downtown and adjacent neighborhoods to the north, Davis Place south of Forest Park Parkway between Brentwood and Hanley, in the Moorlands south of Wydown and east of Hanley, and in the DeMun neighborhood.

There are noticeable pockets of Clayton that do not have sidewalks or ADA curb ramps. Southmoore, Forest Ridge, Fauquier Dr, and Alexander Dr are private streets, but do include sidewalks, though not always

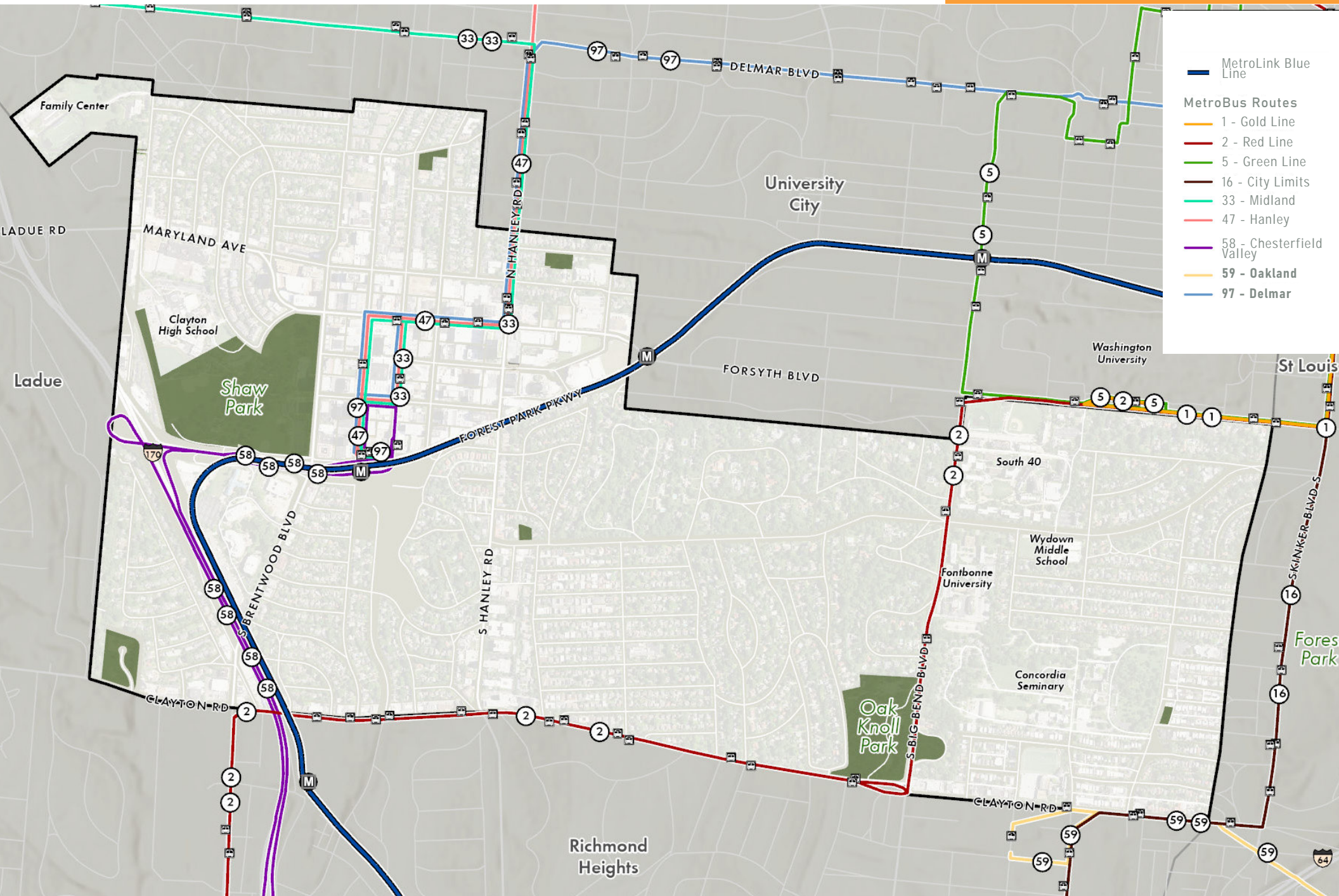
a complete network. Major roadways that intersect these private streets such as Big Bend and Wydown do include ADA curb ramps.

With large institutional parcels and greenspace also occupying significant space in Clayton, the sidewalk network is not shown on the map above. Much of these areas include walking paths and private pedestrian connections to surrounding areas, though not visible on the map.





# EXISTING TRANSIT ACCESS



## Public Transportation

Clayton is relatively well served by the region's public transit system, within a MetroLink light rail station and multiple bus routes.

The MetroLink Blue Line passes through the City, continuing west from Washington University's campus and stopping just east of the City boundary at the Forsyth Station. The line then continues south through the City, stopping at the Clayton Station, adjacent to Forest Park Parkway between Meramac and S. Central on the southern edge of Downtown. The train provides both eastbound and westbound service with headways of 20-minutes during most operating hours. The Blue Line continues south to neighboring communities, ending at Shrewsbury-Landsdowne and east where it meets the Red Line and continues to either the Airport or Fairview Heights.

In addition to MetroLink, the City is also serviced by the regional MetroBus system, providing additional transit connections.

Transit usage in the City of Clayton is very low. Residents are unlikely to use the transit system for regular use and, instead, utilize the Clayton or Forest Park MetroLink stations for a direct route to Downtown St. Louis for recreation. Given the accessibility though, it is a significant asset for the City of Clayton and there is an opportunity for increased usage in the future.



## Moving Around Clayton

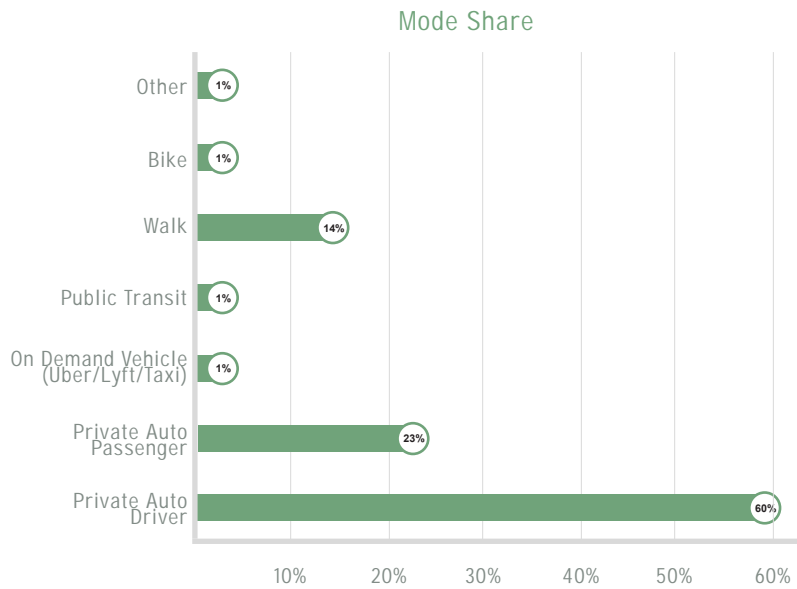
Travel demand patterns play a crucial role in understanding how people move within and around the City of Clayton. This information is obtained from an activity-based travel demand model called Replica. Clayton is part of a larger transportation system, and this model helps us analyze and predict how individuals travel to, from, and within the City. The data provided by Replica includes valuable insights about the mode of transportation used for trips, the length of each journey, and the purpose behind these trips. By studying these patterns, we can gain a better understanding of the transportation needs and preferences of the community in Clayton.

On a typical weekday, most people are traveling inside and outside of the City of Clayton. Only about 12% of trips happen solely within the Clayton.



## Mode Share

While most trips in Clayton are made by people driving a car, over 15% of the daily trips are made by those walking, biking, or taking transit. Walking represents the largest mode share of the non auto-mobile options, at nearly 14% of all trips.

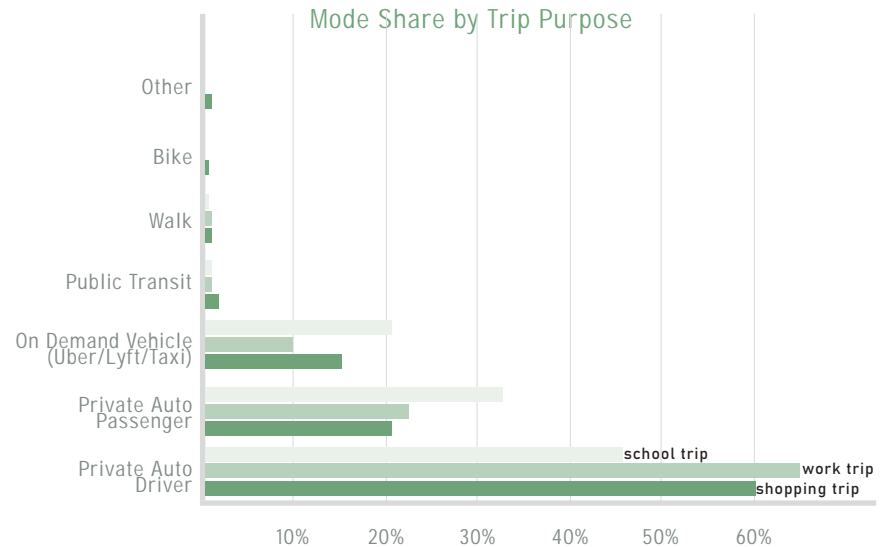


To drill down on this even more, an analysis of mode share was completed, separating the information out by trip purpose. Looking at work trips, 87% of users are traveling in an automobile, 10% of users indicate they walk, 1.3% take public transit, and less than 1% bikes.

When considering trips where the primary purpose is shopping, these numbers breakdown slightly differently.

While travelers still heavily defer to automobiles for shopping trips, the numbers are slightly more balanced with about 80% using a car and 16% walking.

This split is even more balanced when looking at trips where the primary purpose is school. In this case, more than 20% are walking. This is logical given the proximity schools typically have to residential areas, even more so when adding the undergraduate population living in Clayton and likely walking to campus each day.



### Travel Distance

It tends to be more difficult to make longer trips by walking, biking, and taking transit, since these modes are often slower. But for shorter trips, those under 3 miles, these modes are more practical.

When looking at distance traveled, the median distance for all trips is 4.7 miles. Unsurprisingly, work trips have the largest trip distance. Because Clayton is located in the center of a larger region, people that live in Clayton often travel to other communities for work. On average, work trips are 7.2 miles. Social activities also have a longer than average trip distance at 5.6 miles. In contrast, recreation, school, eating, and shopping trips have a shorter than average length.

A significant number of trips are under 3 miles, yet 3 in 5 of these trips are made by driving a car, being a passenger in a car, or using an On Demand Vehicle like Uber or Lyft. These trips have significant impacts.

**39,700** DAILY VEHICLE MILES from short car trips

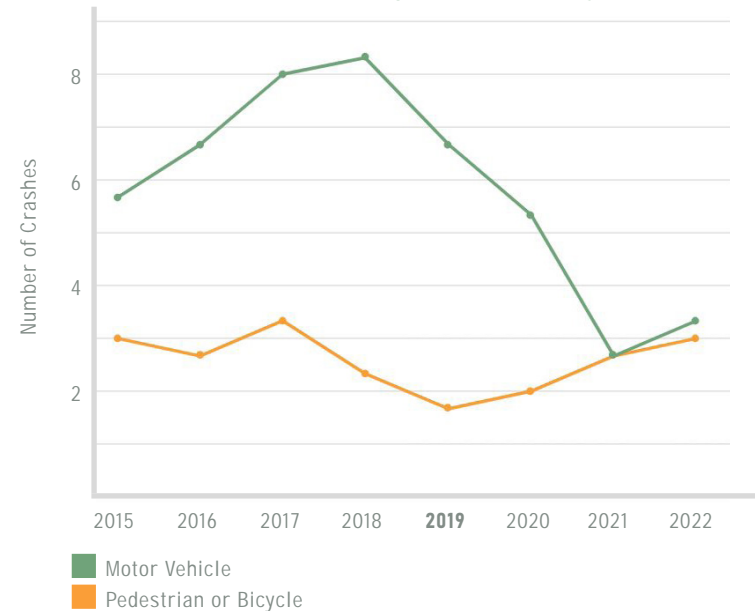
**6,389** TONS OF CO2 annual co2 emissions from short car trips



### Safety

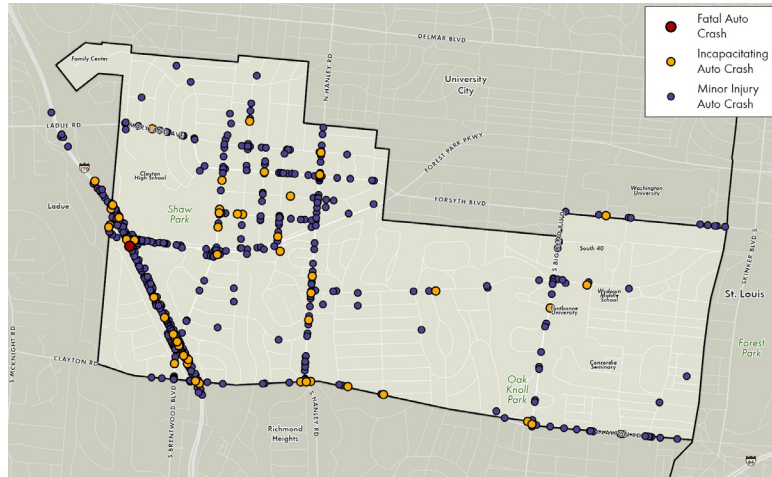
There have been 83 fatal or incapacitating (“serious injury”) crashes in the City of Clayton between 2013-2022, according to data from MODOT. While crash totals tend to vary from year to year, the 3-year moving trend between 2015 and 2022 shows an increase in bicycle and pedestrian crashes in recent years. As car safety and technology has improved, motor vehicle trends in Clayton have also improved.

Fatal or Incapacitating Crash Trends by Mode



Including all crash types for the same reporting period, MODOT records indicate 1,093 crashes occurred in the City of Clayton. Given severity of crash and injury, it is estimated these incidents cost over \$231 million.

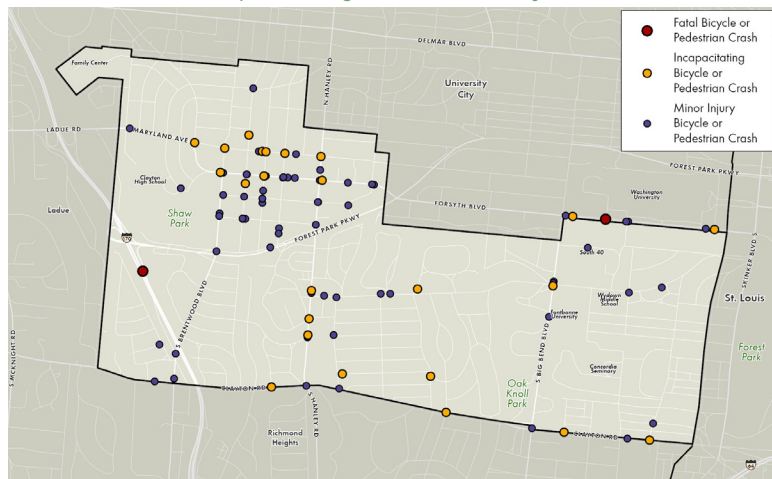
### Fatal or Incapacitating Automobile Crashes



The maps to the left analyze important transportation safety data. The first map depicts the location of fatal, incapacitating injury, and non-incapacitating injury or “minor” injury crashes over the past 10 years from both automobile and pedestrian and bicyclist crashes. Roadways not managed or controlled by the City of Clayton, including I-170, are identified.

Motor-vehicle accidents are concentrated on I-170 and major roadways in the community, most of which are not owned by the City of Clayton so control of roadway changes or speed is limited. The only fatal automobile accident in the past 10 years occurred on I-170. A review of the Downtown area in particular found that there were quite a few incapacitating and minor injury crashes on Clayton-owned streets. The Brentwood Boulevard and Bonhomme Avenue intersection and surrounding area in particular was the site of five incapacitating injury crashes, a noticeable concentration. Very few automobile accidents were reported on the City’s smaller residential streets.

### Fatal or Incapacitating Pedestrian/Bicyclist Crashes



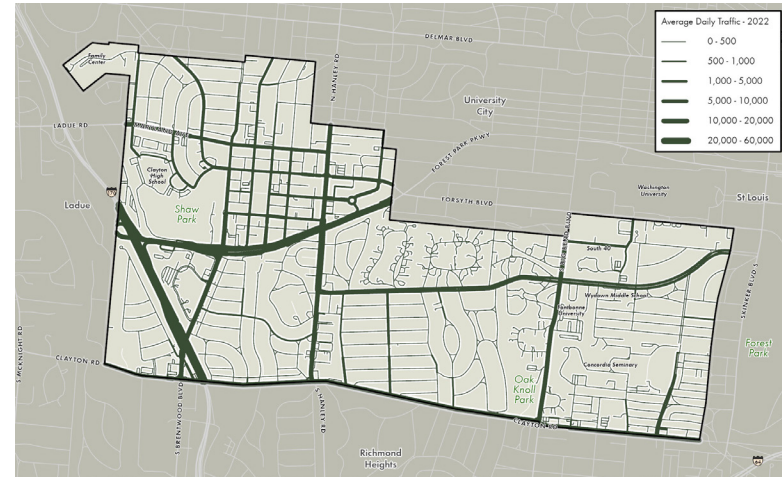
When considering bike and pedestrian safety, a review of crashes involving a person on foot or bike was conducted. This found two fatal injuries over the past ten years: one involving a pedestrian on I-170 and the other on Forsyth Boulevard adjacent to Washington University’s campus. A concentration of incapacitating injury crashes is visible in Downtown Clayton, particularly on Forsyth Boulevard and Maryland Avenue between Brentwood Boulevard and Hanley Road.



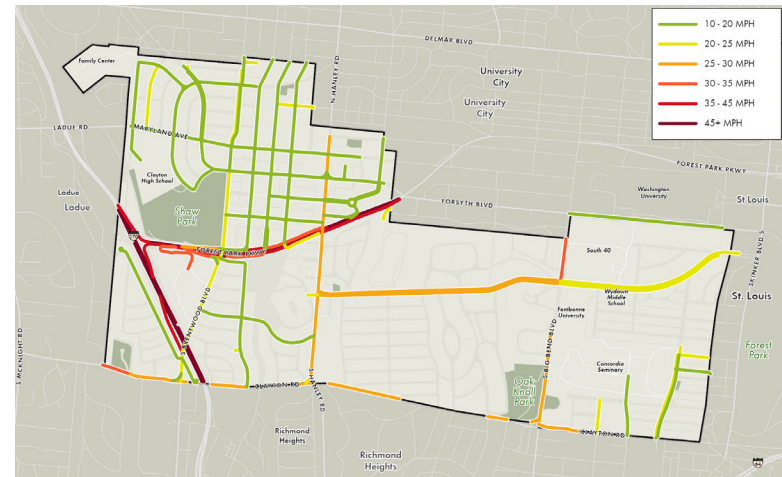
The map to the right depicts 2022 traffic volumes (Average Daily Traffic) for all roads in the City of Clayton. Most roads in Clayton have fewer than 10,000 vehicles per day. Hanley Road, Big Bend Boulevard, and Brentwood Boulevard, all serve between 10,000-20,000 vehicles per day. Unsurprisingly, the I-170 corridor that touches the western part of the community and Forest Park Parkway see the largest traffic counts of all roadways in the City.

The map below displays the roadway speed. Speed is an important factor in safety outcomes on most roadways, especially for people walking or biking. The map shows the observed Free Flow Speed in 2022 on major roads in Clayton. The Free Flow Speed is equivalent to the 66th percentile speed during off-peak hours. The marked speed limit on the elevated section of Forest Park Parkway that runs adjacent to Downtown Clayton is 40 miles per hour. As the map indicates, the free flow speed on this stretch in both directions is significantly higher than the marked speed limit. Elsewhere in the community, free flow speeds are generally close to the marked speed limits. The free flow speed in most of Downtown is below 20 miles per hour, considered relatively safe for pedestrian and cyclist areas. Major roadways including Big Bend, Hanley Road, and Clayton Road have speeds of close to 30 miles per hour.

Average Daily Traffic



Free Flow Speeds



According to the National Highway Traffic Safety Administration, every 10 mile per hour increase in speed doubles pedestrian mortality rates. For example, from 25 to 35 miles per hour, the mortality rate increases from 4.4% to 10.5%. Given this, it is important to assess both roadway speed and the built environment where automobile and pedestrian conflicts are likely to occur.



People moving through various parts of Clayton



## Conclusion

Understanding the existing conditions in the City of Clayton is an important part of any Comprehensive Plan process. While the data collection and analysis will continue throughout the Comprehensive Plan process, this document represents a point-in-time look at the community and helps to provide the baseline information needed to plan from. The Comprehensive Planning process will continue through Spring of 2024 and continue to build upon this information.



Downtown Clayton

