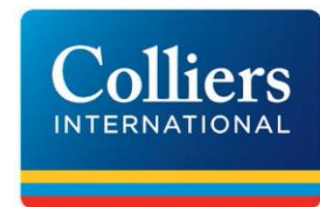




University City Economic Development Strategy

Task Force Meeting #2

June 4, 2020



AGENDA

- Welcome
- Overview and Schedule
- Assessment and Market Analysis Overview
 - SWOT Analysis
 - Cluster Analysis
 - Task Force Survey/Comments
- Discussion and Questions
 - Business Programs
- Upcoming Schedule
- Other Items



ECONOMIC DEVELOPMENT
STRATEGY

PLANNING TEAM



Stephen Ibendahl
Project Manager



Beth Noonan
*Economic
Strategy*



Alison Gray
*Market and
Demographic
Analysis*



Jacqueline Davis-
Wellington
*Economic
Strategy*

Other Team Members
Laura Linn
Graphics and Planning

Katie McLaughlin
Planning

Overview of Task Force

The background image is a blue-tinted photograph of a university campus. On the left, there is a tall, octagonal stone tower with a lion sculpture on top. To the right, there is a large, ornate building with a dome and arched windows. The scene is set against a backdrop of trees and a cloudy sky.

ROLE OF TASK FORCE

- **“Ad-Hoc” Advisory Committee**
 - Sounding board for the planning team.
 - A shared strategy.
- **Representatives from across the City**
 - Chosen by City Council and Mayor.
- **Meeting 5 Times During Process**



Overview and Schedule

The background image is a blue-tinted photograph of a university campus. On the left, there is a tall, octagonal stone tower with a lion sculpture on top. To the right, there is a large, ornate building with a dome and arched windows. The scene is set against a backdrop of trees and a clear sky.



ECONOMIC DEVELOPMENT
STRATEGY

Schedule

1

Economic and Market Assessment

- Project kickoff
- Stakeholder and focus group meetings
- Assessment, benchmarking & evaluation
- Market & industry cluster analysis

Deliverable: Assessment and Market Analysis Report

December - March 2020

2

Draft Economic Development Strategy

- Neighborhood economic nodes (place-based growth strategy)
- Draft recommendations & best practices
- Follow-up stakeholder meetings
- **Community Open House**

Deliverable: Draft Economic Development Strategy

April - July 2020

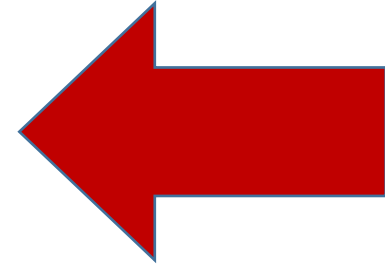
3

Final Economic Development Strategy and Adoption

- Refinement of recommendations and best practices
- Implementation strategies and metrics
- Adoption of plan

Deliverable: Final Economic Development Strategy

July - October 2020





Schedule

Schedule

1

Economic and Market Assessment

- Project kickoff
- Stakeholder and focus group meetings
- Assessment, benchmarking & evaluation
- Market & industry cluster analysis

Deliverable: Assessment and Market Analysis Report

December - June 2020

Task Force Meeting #3
(Place-Making): Early July

2

Draft Economic Development Strategy

- Neighborhood economic nodes (place-based growth strategy)
- Draft recommendations & best practices
- Follow-up stakeholder meetings
- **Community Open House**

Deliverable: Draft Economic Development Strategy

June - September 2020

Task Force Meeting #4
(Draft Strategies and Recommendations): Late Aug

Community Open House:
September (TBD)

3

Final Economic Development Strategy and Adoption

- Refinement of recommendations and best practices
- Implementation strategies and metrics
- Adoption of plan

Deliverable: Final Economic Development Strategy

Sept - November 2020

Draft Economic Development Strategy: Sept / Oct (TBD)

Stakeholder Meetings

The background image is a blue-tinted photograph of a university campus. In the foreground on the left is a tall, square stone tower with a lion statue perched on its roof. To the right, a large, ornate building with a prominent dome and arched windows is visible. The scene is set against a backdrop of trees and a clear sky.



ECONOMIC DEVELOPMENT
STRATEGY

STAKEHOLDER MEETINGS

**February thru Early
March**

- **Initial goal of 15-20 meetings.**
- **Ended up with 30 meetings.**





ECONOMIC DEVELOPMENT
STRATEGY

STAKEHOLDER MEETINGS

Jonathan Browne, Novus Companies

Capacity (Jenny Fritz, Kathryn Love)

Paulette Carr, Councilmember

Stacy Clay, Councilmember

Terry Crow, Mayor

Tim Cusick, Councilmember

Charles Deutsch, The Gatesworth

Sam Estep, Task Force Member and Saratoga Capital Group

Nina Ganci, SKIF International

Mary Gorman, Property Owner (and tenants: Clarity Salon & Spa, Ivy Grace

Boutique, Subterranean Books, Three Kings Pub, The Wizards Wagon)

Jeff Hales, Councilmember

Deborah Henderson, Midwest Association of Farmers Markets

Stacey Hudson, CORE Facility Services

Bill Krenn, Winco Windows

Arthur Krichevsky, Kismet Pharmacy

Natasha Kwan, Task Force Member and Small Business Owner

Loop Special Business District Board

Steve McMahon, Councilmember

Sean Mullins, Asian American Chamber of Commerce

John Simanowitz, Integrity

Bwayne Smotherson, Councilmember and Task Force Member

Steve Stone, Property Owner

Kevin Taylor, Task Force Member

Ty Thornhill, Desco Group

Max Tsai, Gourmet Soy Foods

University City School District (Susan Hill, Clay Ware)

Dan Wald, Rodan Management

Washington University (Mary Campbell, Stephen Condrin, Jodie Lloyd, JoAnna Schooler)

Jeff Weintrop, Silver Lady



DELIVERABLE: ASSESSMENT AND MARKET ANALYSIS REPORT

Part 1 – Narrative

- SWOT Analysis
- Market and Industry Cluster Analysis
- Economic Development Ecosystem
- Municipal Economic Capacity and Tools
- Macro Economic Trends

Part 2 – Data

- Demographics
- Tapestry Report
- Market and Industry Clusters
- Commercial Real Estate
- Activity Hubs
- Residential Real Estate
- Development Notes
- Market Indicators
- Opportunity Atlas

Assessment and Market Analysis

- SWOT

Strengths

Weaknesses / Threats

Opportunities



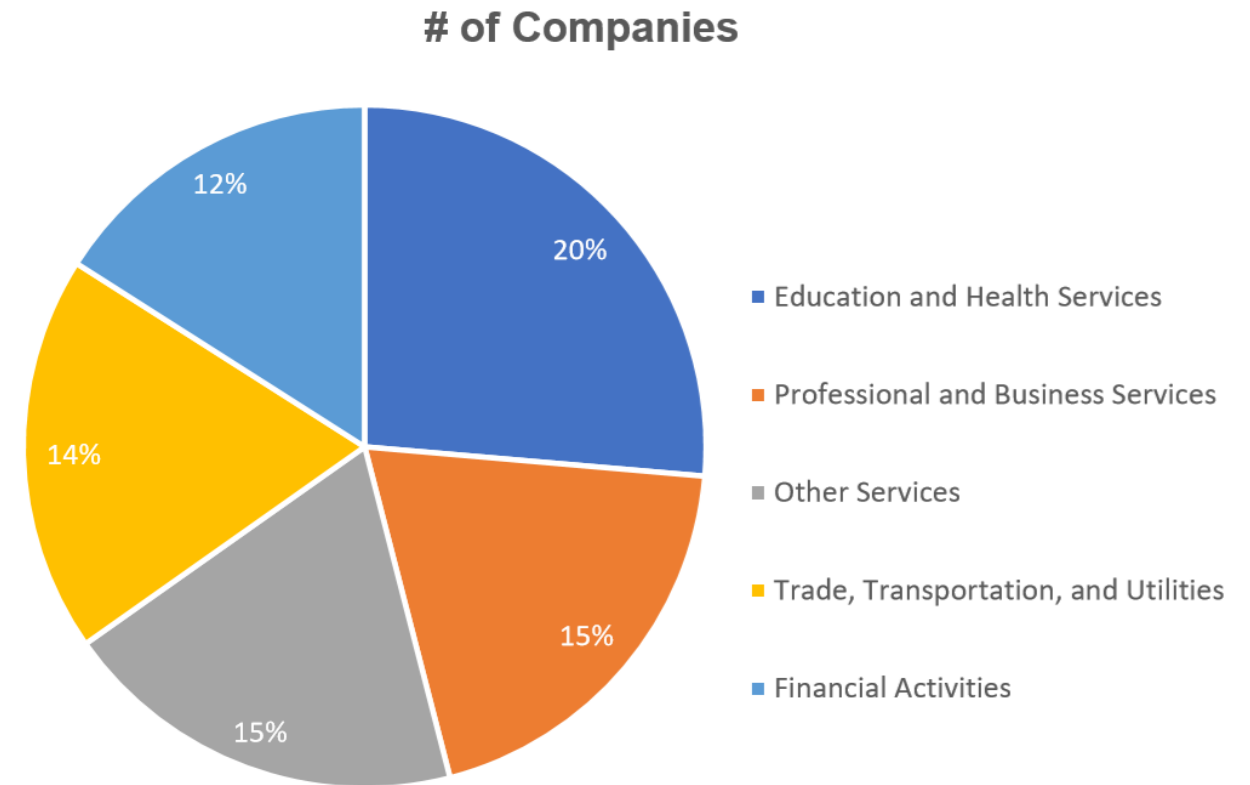
STRENGTHS

- Existing Diversity of Businesses
- Iconic Delmar Loop
- Authenticity
- Central Location
- Entry Level Opportunities
- Growing Tech Cluster
- Destination Retail, Dining, and Entertainment
- Proactive City Planning
- Professional Economic Development Staff
- Effective Economic Development Tools
- Career Centered School District
- Strong Community
- Community Support
- Washington University Spending Impact
- Quality of Life Amenities



STRENGTHS: EXISTING DIVERSITY OF BUSINESSES

Diverse, multi-sector base of businesses (light industrial/manufacturing; office; and retail, dining and entertainment) that stabilize the City and provide opportunities for economic growth.





STRENGTHS: DELMAR LOOP

Iconic Delmar Loop designated as one of the Ten Great Streets in America that attracts regional and national tourists and serves as an important “brand” for University City.





STRENGTHS: AUTHENTICITY

Walkable, authentic neighborhood centered community with appealing historic architecture, parks, neighborhood commercial offerings with proximity to cultural and community assets in University City (e.g., COCA, the Pageant, CASA, art galleries, Craft Alliance) and the City of St. Louis (Forest Park).





STRENGTHS: CENTRAL LOCATION

Central location with excellent accessibility for both visitors and workers by highways/roadways and public transportation, including Metrolink station that provides regional access.



STRENGTHS: ENTRY LEVEL OPPORTUNITIES

Concentration of large employers in senior care/nursing homes as well as light industrial/manufacturing that provide accessible, entry level job opportunities.

2019

Employer	Employees
The Gatesworth	589
University City School District	588
City of University City	305
Wiese	225
Winco Window Company LLC	190
Cintas	167
Schnucks	150
Blueberry Hill	70
Capacity	70
Integrity	40



STRENGTHS: GROWING TECH CLUSTER

Growing tech cluster that provide quality, high paying jobs that will attract employees from across the region and country and provide a core of patrons for local shops and restaurants/entertainment and who can be advocates for the community.





STRENGTHS: DESTINATION RETAIL, DINING, AND ENTERTAINMENT

Destination retail, dining, and entertainment areas that have grown organically, e.g., the Loop and the International Corridor, and help to differentiate University City from other local communities and area dining and entertainment districts.





STRENGTHS: PROACTIVE CITY PLANNING

City proactively pursues planning efforts and analysis that will provide them with a solid foundation for strategic decision-making.



ECONOMIC DEVELOPMENT
STRATEGY

STRENGTHS: PROFESSIONAL ECONOMIC DEVELOPMENT STAFF

Professional and highly qualified
City staff member dedicated to
economic development.



STRENGTHS: EFFECTIVE ECONOMIC DEVELOPMENT TOOLS

City effectively uses economic development tools to promote development and reinvestment, including 353 Urban Redevelopment Corporations, Land Clearance for Redevelopment Authority, Tax Increment Financing and EDRST which provides a pool of funds for economic development.



ECONOMIC DEVELOPMENT
STRATEGY

STRENGTHS: CAREER CENTERED SCHOOL DISTRICT

School district committed to developing a range of career planning and workforce development programs for students and adults by partnering with the City and local businesses, including a construction training program and pathways to entrepreneurship.

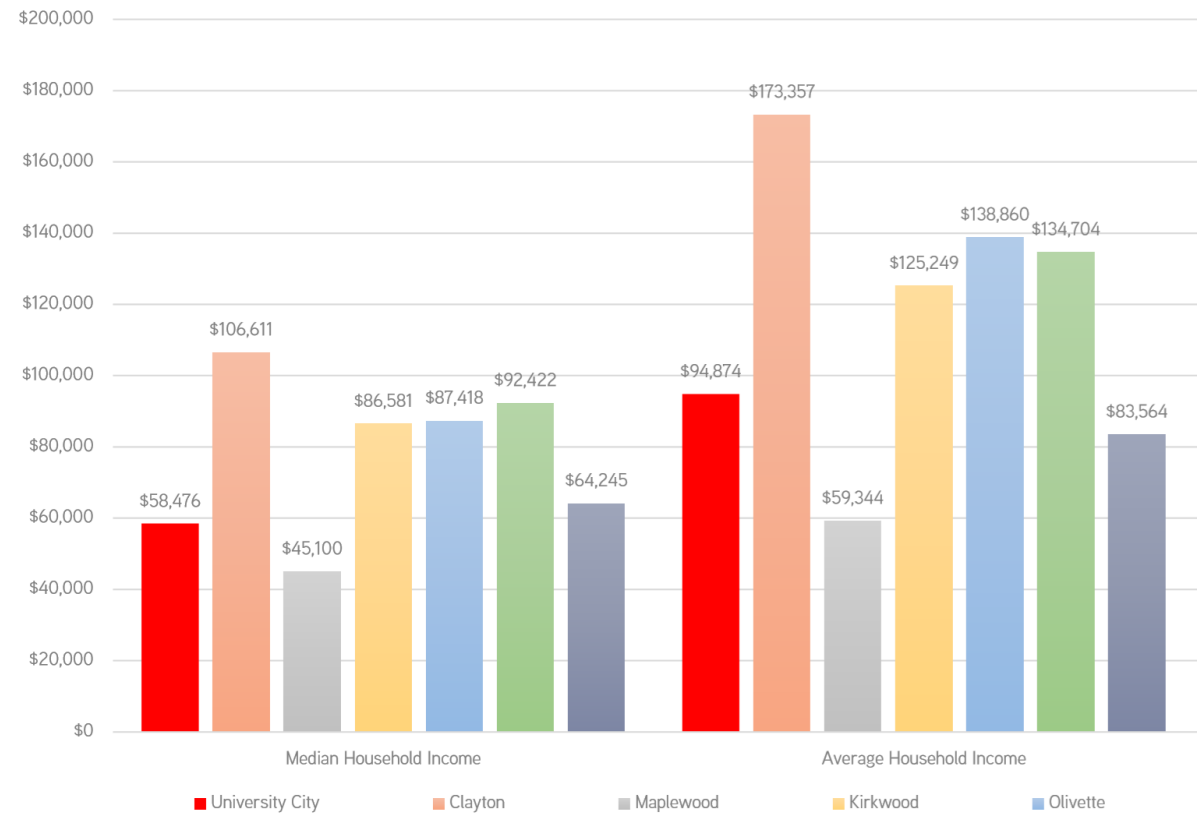




STRENGTHS: STRONG COMMUNITY

Overall well-educated and strong middle- and upper-income community with significant engagement by residents, businesses and institutions that are committed to the future of the City.

Household by Income (Forecast 2019)





STRENGTHS: COMMUNITY SUPPORT

Diverse residential and business community that supports and promotes a range of retail offerings and provides a broader pool of people who would be interested in living, working and playing in the community (potential employees).



ECONOMIC DEVELOPMENT
STRATEGY

STRENGTHS: WASHINGTON UNIVERSITY SPENDING IMPACT

Buying power of Washington University students, faculty and staff, alumni and other visitors to the university.



STRENGTHS: QUALITY OF LIFE AMENITIES

Recreational and greenspace amenities, including community center, golf course, parks and access to the regional Great Rivers Greenway biking and pedestrian greenway system. Lively arts and entertainment scene.





WEAKNESSES AND THREATS

- Loop has Lost its Luster
- Lack of Collaboration between City and Washington University
- Loss of Property Tax Revenues
- Uncertainty of I170-Olive Redevelopment Area
- Loss of Chamber
- Increased Vacancies and Increased Rents
- Perceptions that the City is too Loop Centric
- Lack of Business Community Voice
- Olive Redevelopment Challenges
- Age of Building Stock
- Olive Divide



WEAKNESSES AND THREATS: LOOP HAS LOST ITS LUSTER

- Increased competition (Grove, the East Loop, Maplewood, etc).
- Uncertainty regarding the future of the Loop Trolley.
- Volunteer-based management and operation of the Loop Special Business District undermines its impact and ability to capitalize on opportunities for growth.
- Perceptions of safety.
- Perceive lack of events and marketing.
- Limited parking creates a barrier for increasing local visitors/patrons to the Loop.



WEAKNESSES AND THREATS: LACK OF COLLABORATION BETWEEN CITY AND WASHINGTON UNIVERSITY

Lack of communication and collaboration between University City and Washington University results in misunderstandings and potentially missed opportunities for mutually beneficial partnerships.



WEAKNESSES AND THREATS: LOSS OF PROPERTY TAX REVENUES

Loss of property tax revenues from Washington University and other non-profit property ownership negatively affects City and school district revenues and the City's ability to provide high quality services and offer quality education.



WEAKNESSES AND THREATS: UNCERTAINTY OF I170-OLIVE REDEVELOPMENT AREA

Potential impact of the Novus development on existing businesses in the development's footprint creates uncertainty, which could lead to loss of businesses.



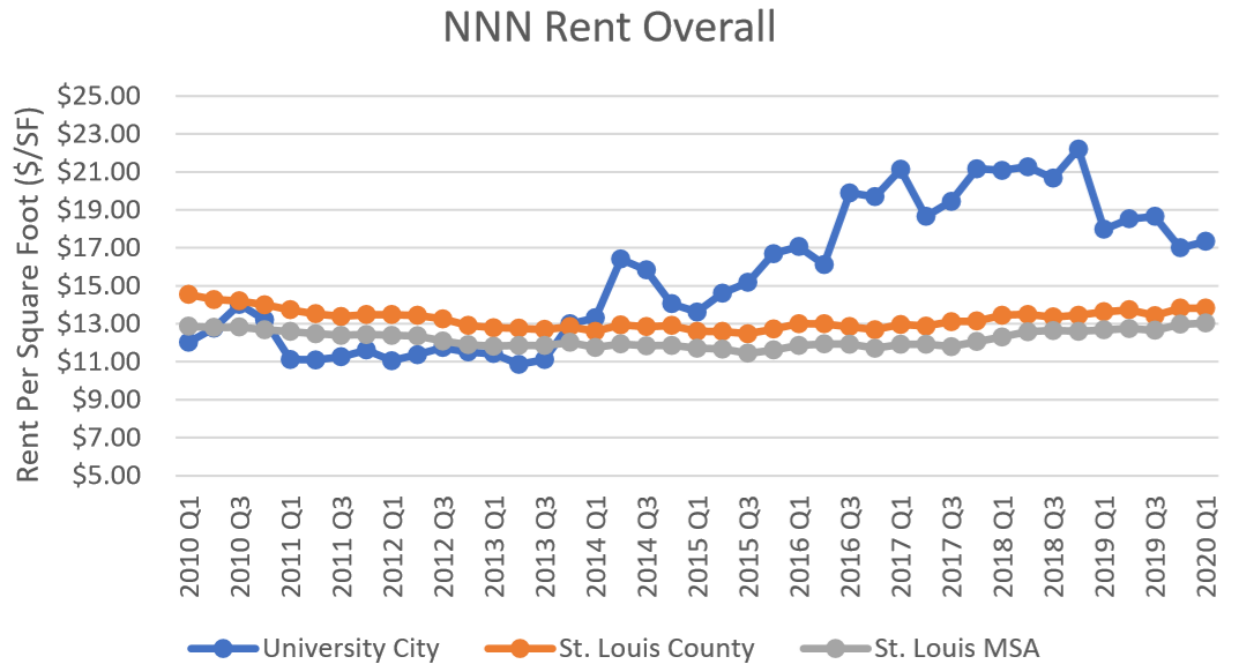
WEAKNESSES AND THREATS: LOSS OF CHAMBER

Dissolution of local of chamber of commerce eliminated vehicle for businesses outside of the Loop to engage in networking, business development and advocacy that strengthens local firms and elevates the community's profile as a place to live, work and play.



WEAKNESSES AND THREATS: INCREASED VACANCIES AND INCREASED RENTS

Vacancy rates for retail in University City have increased over the last year, while rental rates remain well above the rates for both St. Louis County and the St. Louis MSA creating a barrier to attracting and retaining small businesses in the community.





WEAKNESSES AND THREATS: PERCEPTIONS THAT THE CITY IS TOO LOOP CENTRIC

Business sector perceptions that City and Council are too Loop-centric, leaving businesses in the rest of the community feeling that they are not supported.



WEAKNESSES AND THREATS: LACK OF BUSINESS COMMUNITY VOICE

Absence of a clear feedback loop by which local firms can communicate with City departments about ways to improve municipal processes and policies that affect business operations (e.g., permitting, inspections, planning decisions, policing etc.).



WEAKNESSES AND THREATS: OLIVE REDEVELOPMENT CHALLENGES

Small, shallow commercial parcels on Olive restrict development opportunities of this major commercial corridor.



WEAKNESSES AND THREATS: AGE AND AVAILABILITY OF BUILDING STOCK

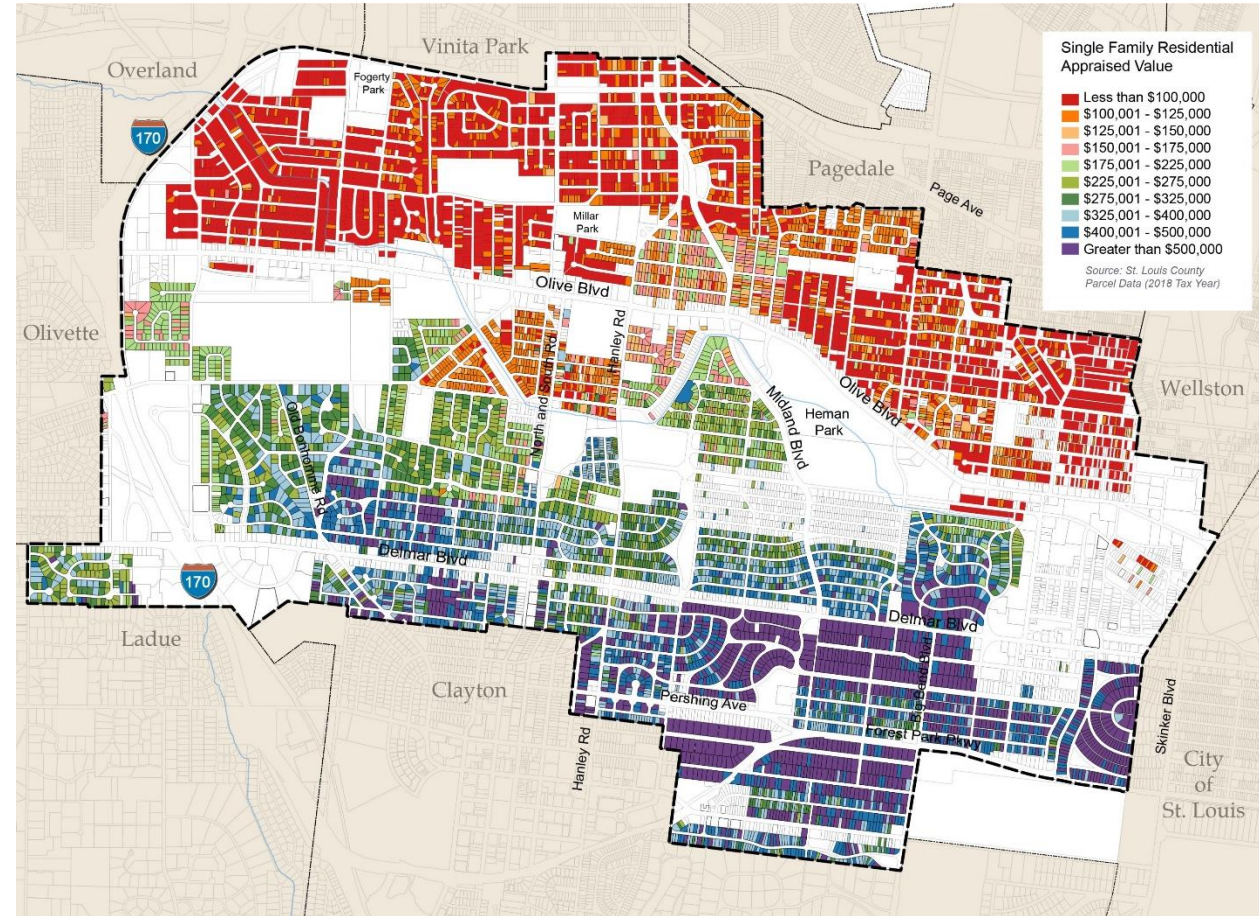
Age and maintenance of commercial building stock in various locations in the City (76.52% of commercial buildings built prior to 1980, with the largest percentage buildings having been constructed between 1941 and 1960 (29.28%)) along with the limited amount of office space may hinder City's ability to attract higher quality professional businesses and retail tenants.

Decade Built	% of Total SF
1900 - 1920	9.29%
1921-1940	15.02%
1941-1960	29.28%
1961-1980	22.93%
1981-2000	12.24%
2001-2010	2.50%
2011-2020	8.74%



WEAKNESSES AND THREATS: OLIVE DIVIDE

While overall household incomes and housing values compare favorable to neighboring communities, there is a distinct difference in incomes and housing values north of Olive.





OPPORTUNITIES

- Technology Sector
- I170-Olive Redevelopment
- Improving University City Entries
- Chamber of Commerce
- Increased Collaboration with Washington University
- Foster Small Business Development
- Keeping the Loop a Top Ten Street
- International District
- New Office Development
- City Marketing
- Skilling Up the Workforce
- Expansion of Industrial/Light Manufacturing



OPPORTUNITIES

Technology Sector

Fostering growth of small but committed technology cluster helps ensure a more diverse economic base that could attract new residents who are well-educated and affluent and who can support other local businesses and the retail/dining/entertainment outlets in the Loop and other parts of the City.

I170-Olive Redevelopment

Novus development has potential to significantly impact the Olive corridor positively by injecting new businesses and economic activity into the west end of the city; generate a pool of resources that can be beneficially reinvested in residential areas along the Olive corridor; and will provide new revenues that support City operations.



OPPORTUNITIES

Improving University City Entries

Improving key intersections and “entry-points” into the City through transportation/streetscape improvements would create a sense of place that helps brand University City and enhance its unique identity.

Chamber of Commerce

Reinstituting a city-wide chamber of commerce that helps local businesses network, encourages a stronger business climate, provides the City with an outlet for communicating with businesses and creates a vehicle for unified business promotion.



OPPORTUNITIES

Increased Collaboration with Washington University

Increasing dialogue and forming a collaborative and consistent working relationship with Washington University would provide the City with the opportunity to address concerns about the university's economic impact on the City and lay the groundwork for developing policies that leverage the University's presence.

Keeping the Loop a Top Ten Street

Supporting active efforts by the Loop Special Business District and property owners to revitalize and re-invest in the Loop creates an opportunity to ensure that it remains a top ten American street. Managing and operating City assets in the Loop in a business-friendly manner that contributes and aligns with revitalization efforts is an important role for the City.



OPPORTUNITIES

International District

The International District is a unique asset that has grown organically in the City. It is the kind of “happy accident” that could position the City through strategic marketing and place-making to capitalize and promote the community’s ethnic diversity, broaden and elevate this brand and create economic opportunity primarily for small businesses.

New Office Development

Low office vacancy rates and relatively high rents when compared with St. Louis County and St. Louis MSA rates suggest opportunity for new office development that would provide opportunities for existing office users to grow in place and for attracting other new businesses to the community.



OPPORTUNITIES

City Marketing

Leveraging new stand-alone economic development website with messaging that highlights the benefits of doing business and living in University City.

Branding and marketing different commercial areas of the City.

Skilling Up the Workforce

Efforts by the University School District to enhance skills and career development for student and adult residents may be leveraged to improve economic opportunity for residents. Program alignment with local businesses may support workforce needs.



OPPORTUNITIES

Expansion of Industrial / Light Manufacturing

As a land locked and developed community, open dialogue with neighboring communities about opportunities for collaboration and partnership that promote expansion of existing industrial/light manufacturing areas may help retain and grow businesses that provide quality jobs.




Assessment and Market Analysis

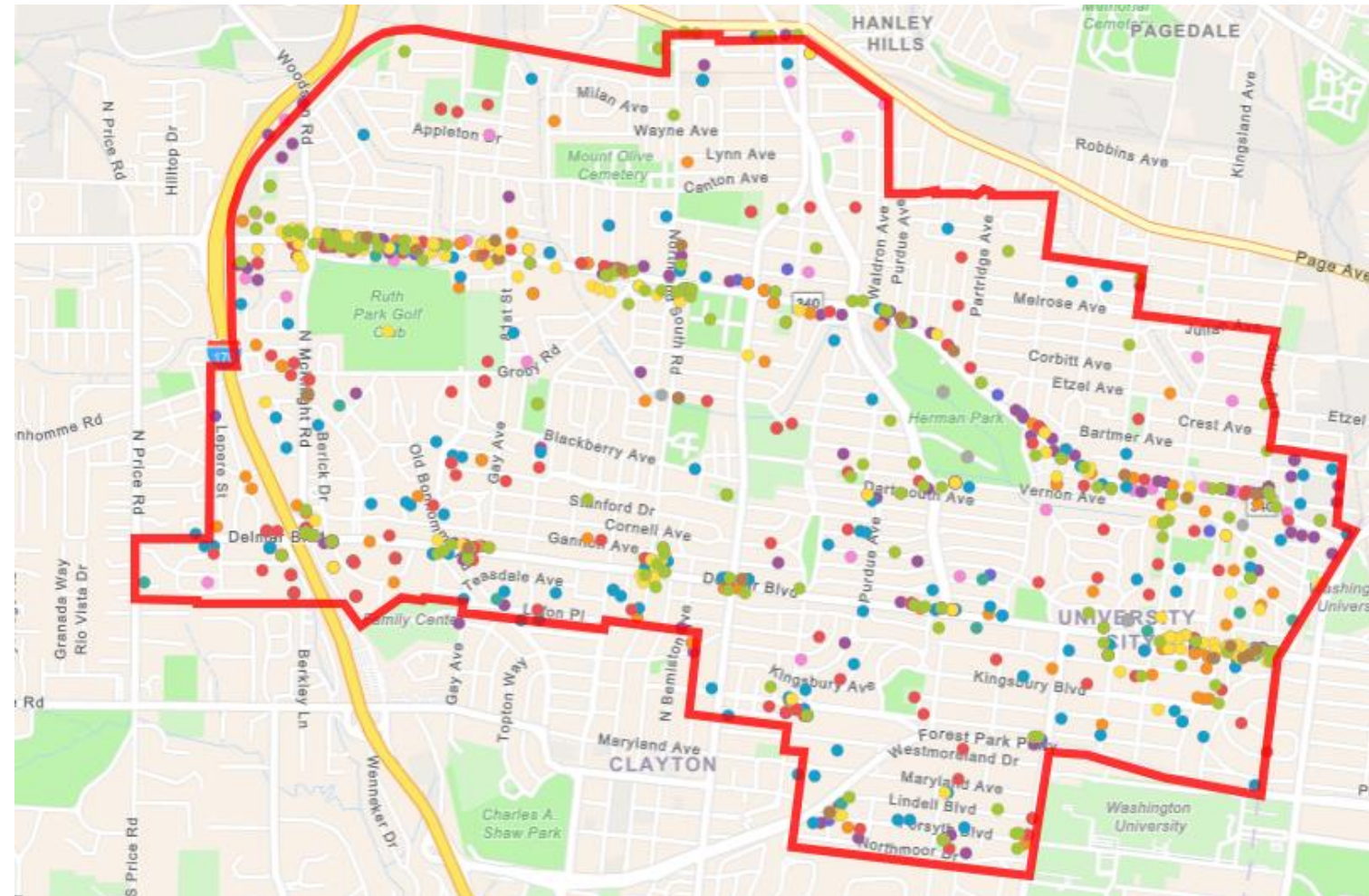
- Cluster Analysis

Market & Industry Clusters

Business Analysis – Companies by NAICS Supersector

MAP KEY

	Construction
	Education and Health Services
	Financial Activities
	Information
	Leisure and Hospitality
	Manufacturing
	Other Services
	Professional and Business Services
	Trade, Transportation, and Utilities
	Unclassified Establishments



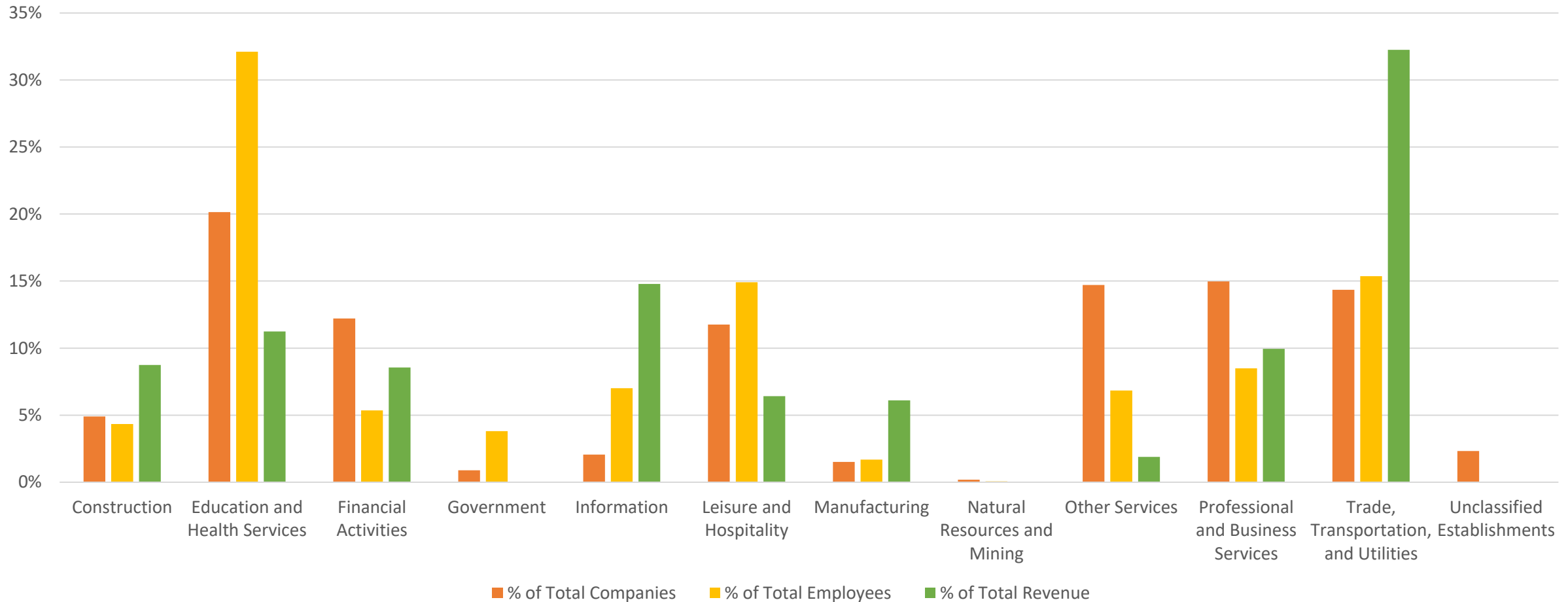


ECONOMIC DEVELOPMENT
STRATEGY

Market & Industry Clusters

Largest Industries – Top Industries by NAICS Supersector

University City – Top Industries by NAICS Supersector





ECONOMIC DEVELOPMENT
STRATEGY

Market & Industry Clusters

Largest Industries – Top Industries by NAICS Supersector

University City – Top Industries by NAICS Supersector

# of Companies	
NAICS Supersector	% of Companies
Education and Health Services	20.14%
Professional and Business Services	14.97%
Other Services	14.71%
Trade, Transportation, and Utilities	14.35%
Financial Activities	12.21%
Leisure and Hospitality	11.76%
Construction	4.90%
Unclassified Establishments	2.32%
Information	2.05%
Manufacturing	1.52%
Government	0.89%
Natural Resources and Mining	0.18%

# of Employees	
NAICS Supersector	% of Companies
Education and Health Services	32.12%
Trade, Transportation, and Utilities	15.36%
Leisure and Hospitality	14.91%
Professional and Business Services	8.49%
Information	7.02%
Other Services	6.84%
Financial Activities	5.36%
Construction	4.34%
Government	3.80%
Manufacturing	1.68%
Natural Resources and Mining	0.06%
Unclassified Establishments	0.03%

Revenue	
NAICS Supersector	% of Companies
Trade, Transportation, and Utilities	32.26%
Information	14.79%
Education and Health Services	11.25%
Professional and Business Services	9.95%
Construction	8.75%
Financial Activities	8.56%
Leisure and Hospitality	6.42%
Manufacturing	6.10%
Other Services	1.89%
Natural Resources and Mining	0.03%
Unclassified Establishments	0.01%
Government	0.00%



ECONOMIC DEVELOPMENT
STRATEGY

Market & Industry Clusters

Largest Employers

2019

Employer	Employees	Note	% Change From 2018
The Gatesworth	589	Includes The Gatesworth & McKnight Place	51.03%
University City School District	588		-28.12%
City of University City	305		-35.11%
Wiese	225		125.00%
Winco Window Company LLC	190		18.75%
Cintas	167		19.29%
Schnucks	150		Not in 2018 List
Blueberry Hill	70		Not in 2018 List
Capacity	70	Business owner previously Answers	Not in 2018 List
Integrity	40		Not in 2018 List

2018

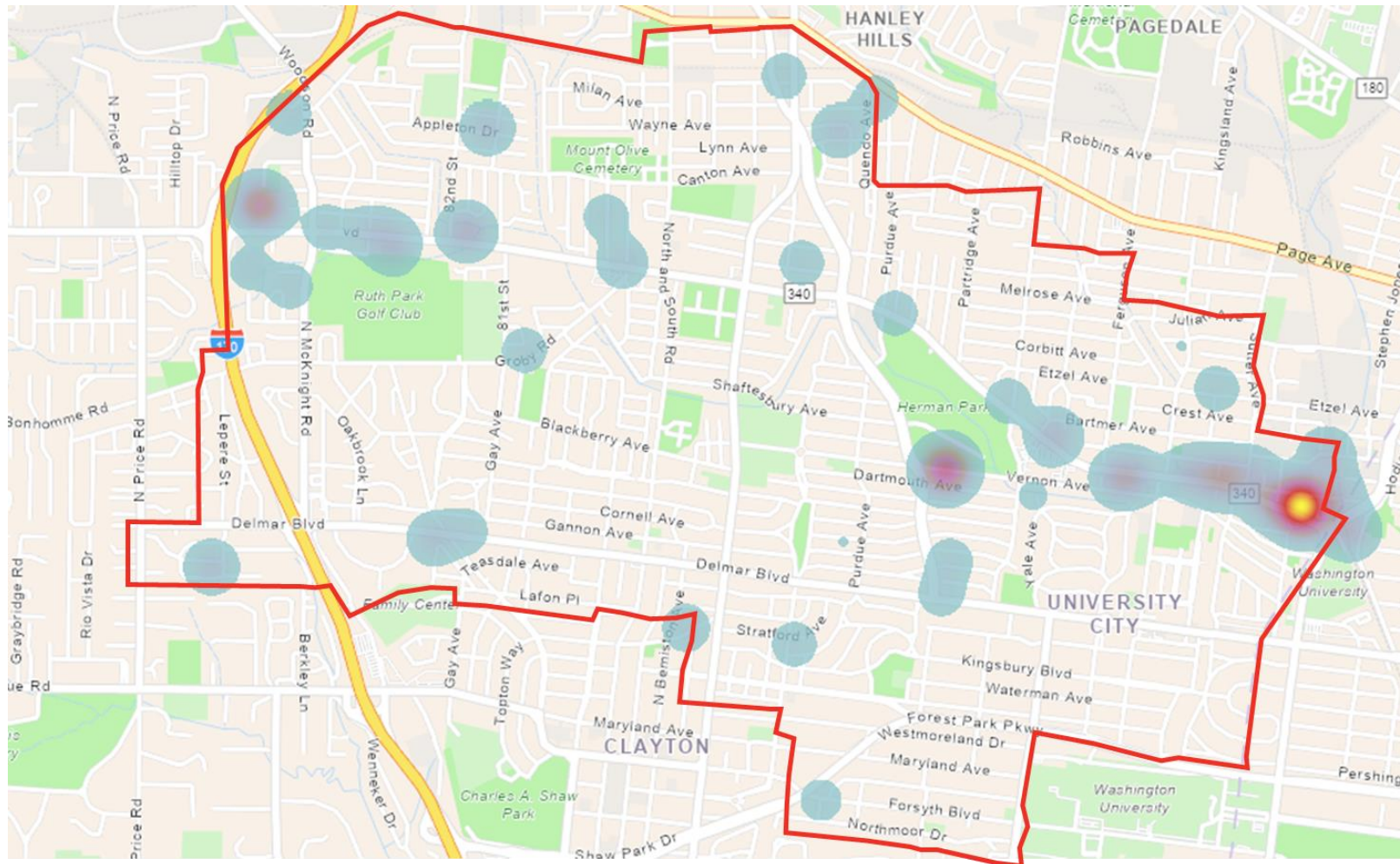
Employer	Employees	Type of Business	% of Total Employment
University City School District	818	School District	12.44%
City of University City	470	Local Government	7.15%
Gatesworth Community	240	Retirement/Independent Living/Nursing Community	3.65%
Victor's Home Care LLC	200	Home Care Services	3.04%
Winco Window Company LLC	160	Winco Window Company LLC	2.43%
Aging Well Healthcare LLC	155	Medical/Non-Medical Services	2.36%
McKnight Place Extended Care	150	Retirement/Independent Living/Nursing Community	2.28%
Cintas	140	Uniform Supply	2.13%
Answer Corporation	137	Technological Services	2.08%
Wiese USA Inc	100	Industrial Truck Sales and Leasing	1.52%



ECONOMIC DEVELOPMENT
STRATEGY

Market & Industry Clusters

Construction by Location Employee Size

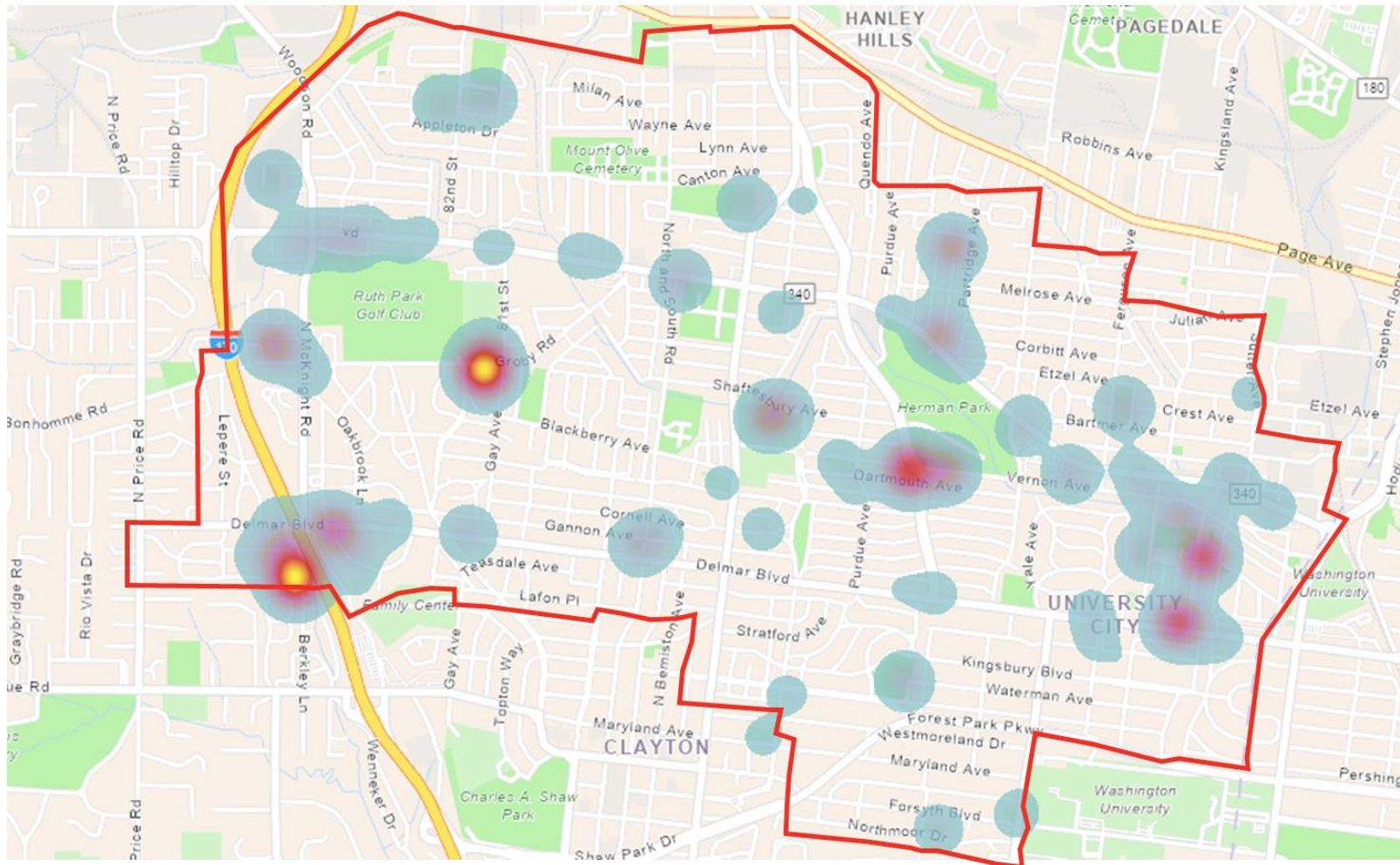




ECONOMIC DEVELOPMENT
STRATEGY

Market & Industry Clusters

Education & Health Services by Location Employee Size

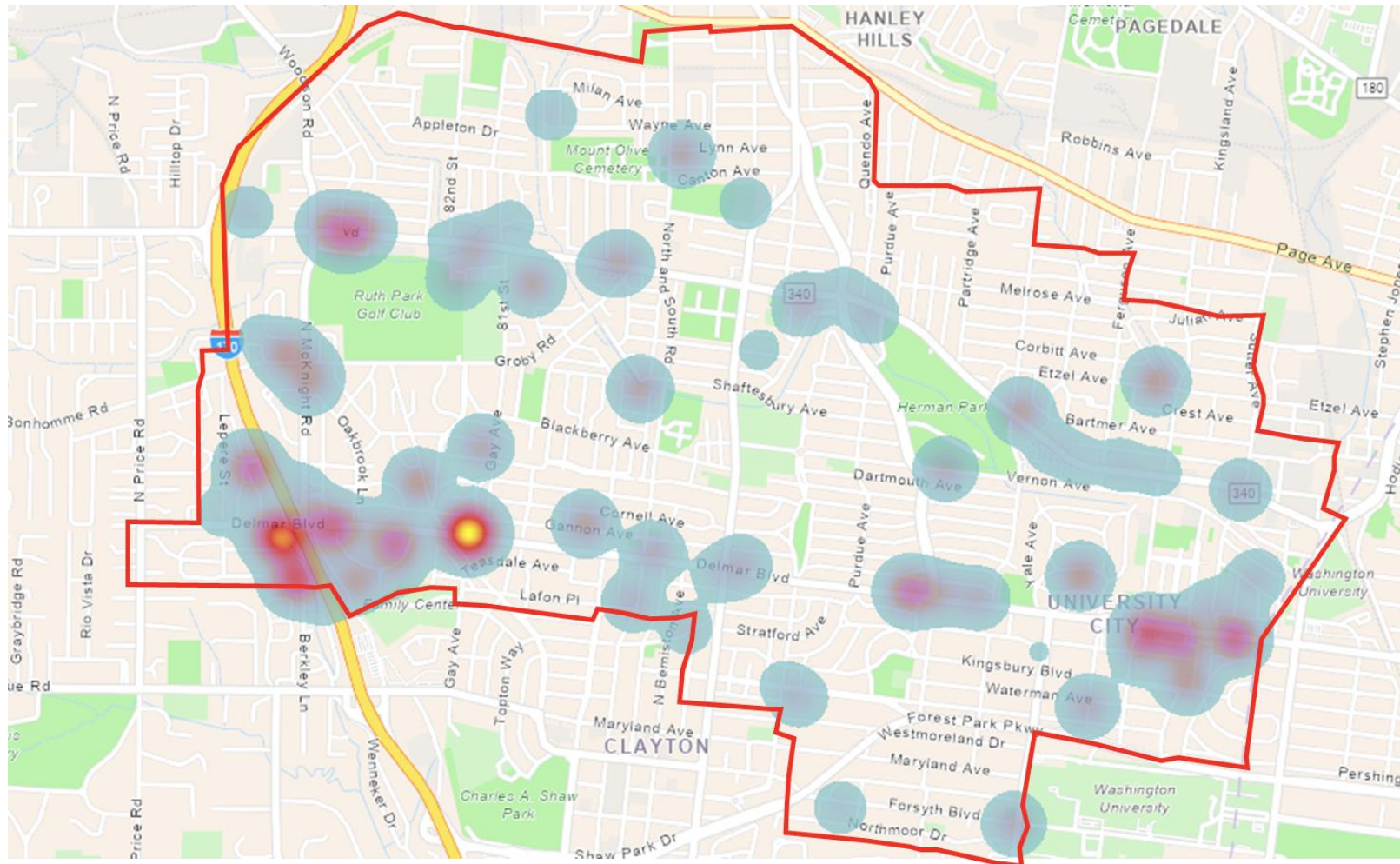




ECONOMIC DEVELOPMENT
STRATEGY

Market & Industry Clusters

Financial Activities by Location Employee Size

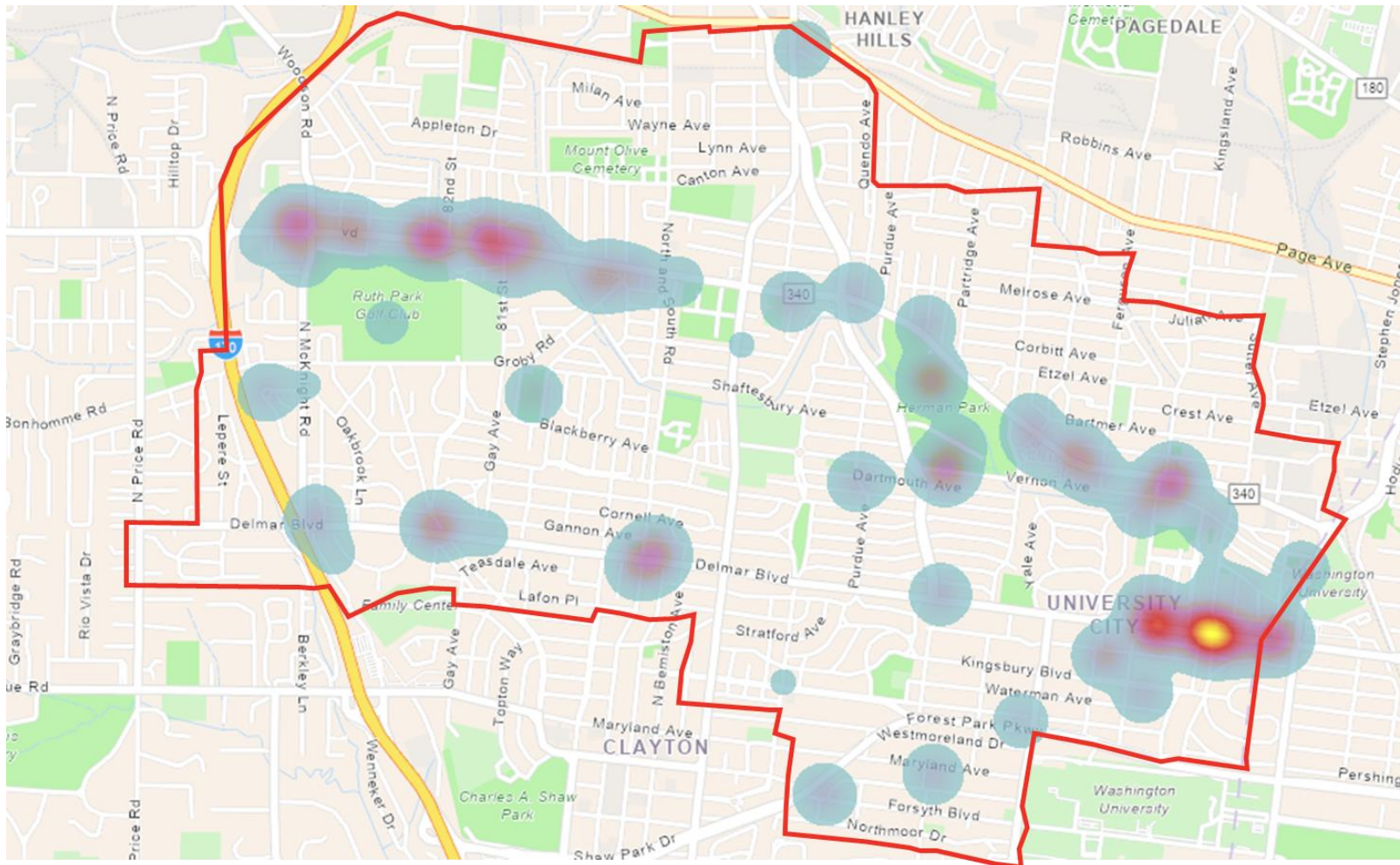




ECONOMIC DEVELOPMENT
STRATEGY

Market & Industry Clusters

Leisure & Hospitality by Location Employee Size

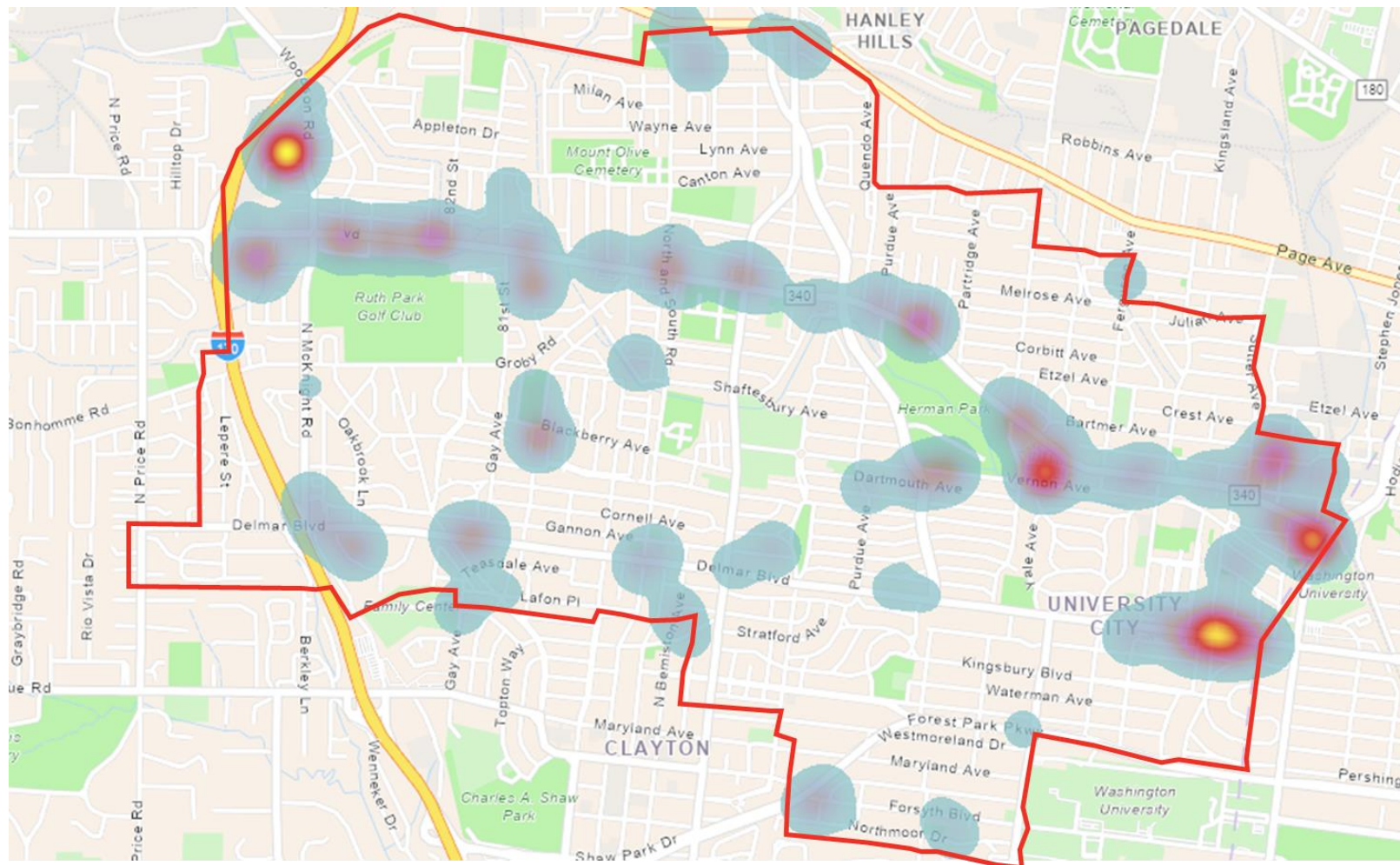




ECONOMIC DEVELOPMENT
STRATEGY

Market & Industry Clusters

Trade, Transportation & Utilities by Location Employee Size

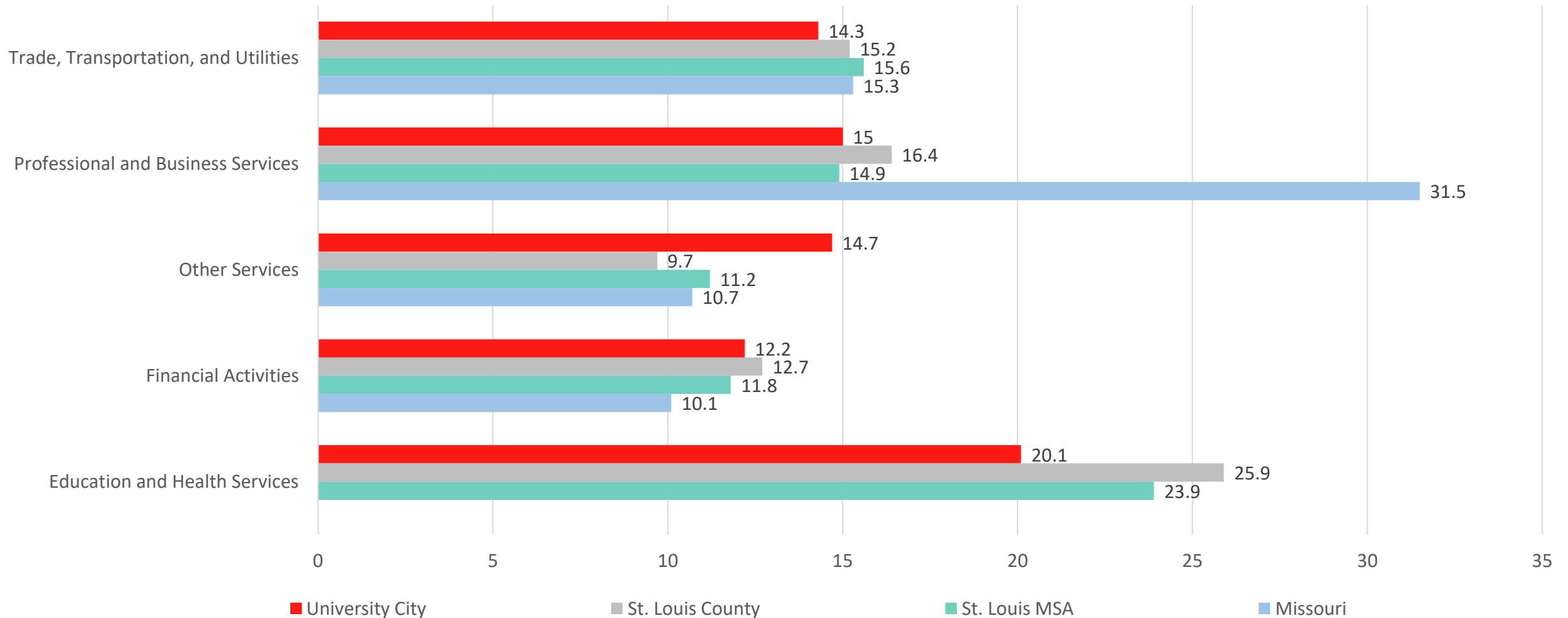




ECONOMIC DEVELOPMENT
STRATEGY

Market & Industry Clusters

Regional Comparison – Top Supersectors (# of Companies)



Task Force Survey

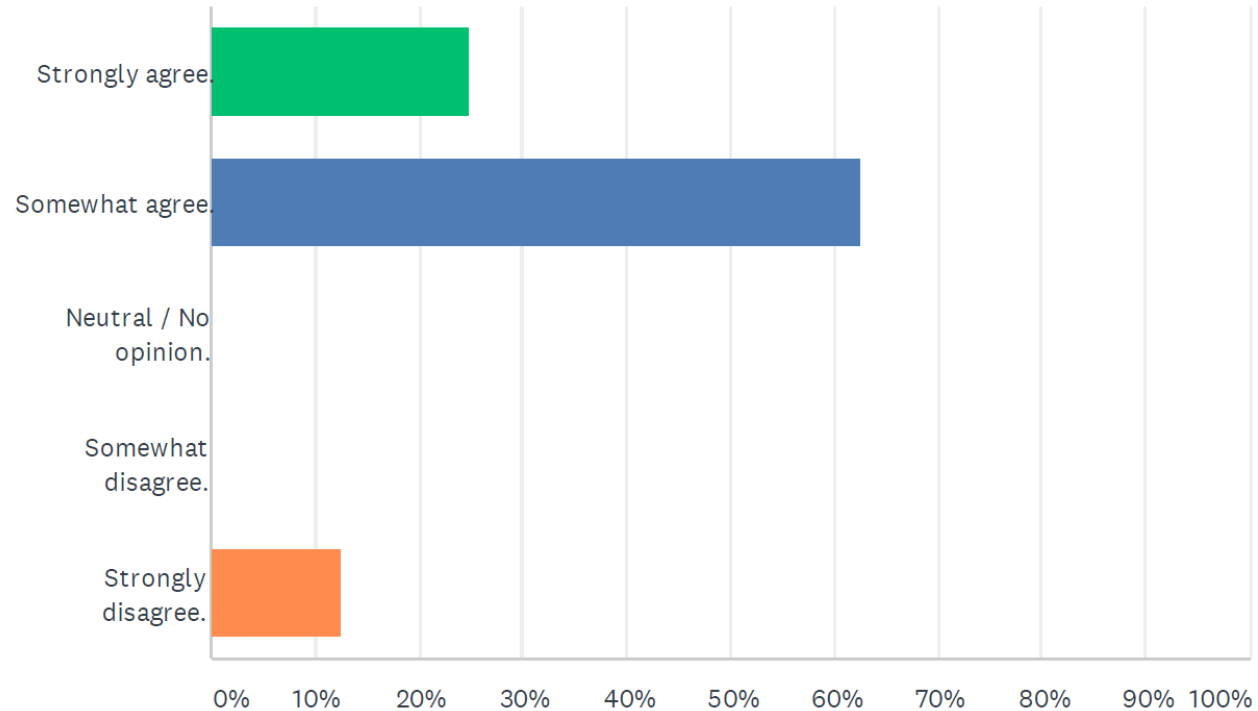
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TASK FORCE SURVEY

Q1 After reviewing the Assessment and Market Analysis report, how strongly do you agree with the Strengths described in the SWOT analysis?

Answered: 8 Skipped: 0

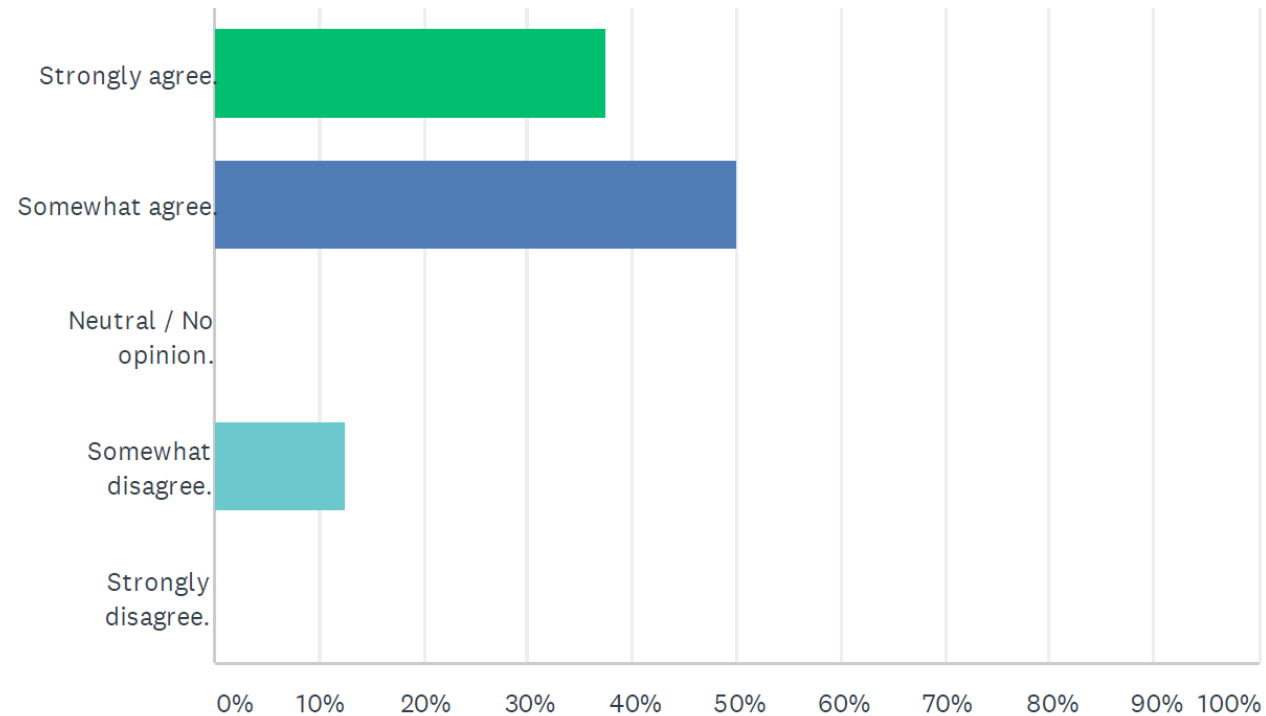




TASK FORCE SURVEY

Q2 After reviewing the Assessment and Market Analysis report, how strongly do you agree with the Weaknesses / Threats described in the SWOT analysis?

Answered: 8 Skipped: 0

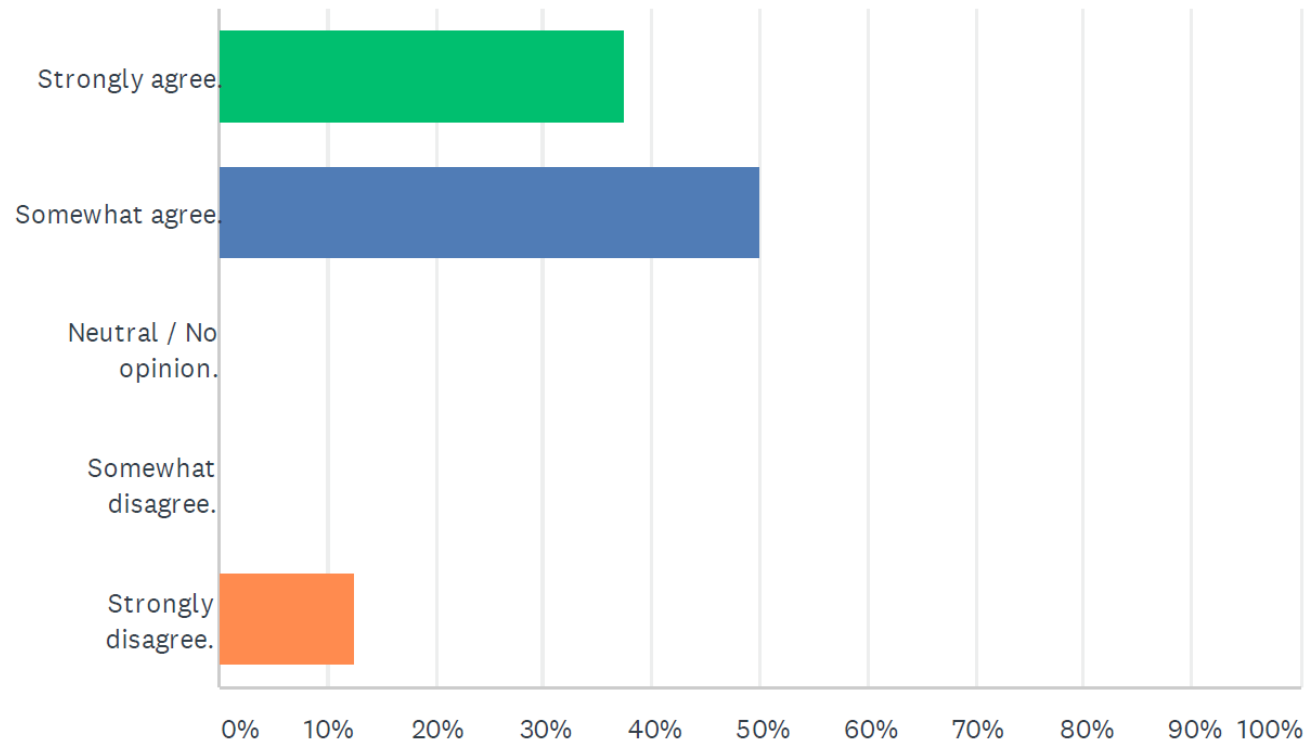




TASK FORCE SURVEY

Q3 After reviewing the Assessment and Market Analysis report, how strongly do you agree with the Opportunities described in the SWOT analysis?

Answered: 8 Skipped: 0



The background of the slide is a blue-tinted photograph of a university campus. On the left, there is a tall, square stone tower with a lion sculpture on top. To the right, there is a large, ornate building with a prominent dome. The text is overlaid on this background.

Discussion / Questions

Feedback on Business Programs

Upcoming Schedule

- Task Force Meeting #3: *(Tentative)* July 9th??
- Task Force Meeting #4: Late August
- Community Open House: September (TBD)

Thank You!

