

Advisory Committee Meeting #2

APRIL 12, 2022



MARKET ANALYSIS
AND FEASIBILITY STUDY

Agenda

- A. Schedule
- B. Upcoming Community Engagement
- C. Background Economic Data
- D. Roll-Out of the Initial Six Land Use Scenarios
- E. Questions and Discussion
- E. Development Principles (Take Home Exercise)
- F. Other Items
- G. Next Steps

Meet the Planning Team



Project Manager



Market Analysis &
Economic Development



Local Business &
Entrepreneur Strategies



Community Engagement



Utilities, Infrastructure,
& Capital Improvements

Upcoming Engagement



SMALL GROUP MEETINGS



PUBLIC FORUM #1



POP-UP EVENTS

Small Group Meetings

LATE APRIL - MAY

8-12 Meetings

10-15 Attendees per meeting

WORKING LIST

Subdivisions near site (4-5 meetings)

Fox Manor Subdivision

Old Jamestown Association

Spanish Lake Neighborhood Association

Spanish Lake CDC

Youth and Young Adults

Business Owners



**SMALL GROUP
MEETINGS**

Pop-Up Events

SPRING/SUMMER

Two Events

WORKING LIST

Old Jamestown Market



POP-UP
EVENTS

Public Forum #1

JUNE

Date and location TBD
(Likely the week of June 27th)

AGENDA

Review and feedback on the six land use scenarios.

Development principles.



**PUBLIC
FORUM #1**

Plan Website and E-Blasts

LOOK FOR UPCOMING WELCOME E-BLAST

Imagine
JAMESTOWN MALL
REDEVELOPMENT

Home Documents Background FAQs

JAMESTOWN MALL MARKET ANALYSIS AND FEASIBILITY STUDY

A community driven, market based approach.

The St. Louis County Port Authority is conducting a Market Analysis and Feasibility Study in 2022 that combines a comprehensive market analysis of a wide range of realistic redevelopment scenarios with extensive community engagement. The purpose of the Jamestown Mall Market Analysis and Feasibility Study is to evaluate the feasibility of potential redevelopment opportunities that are commercially feasible and align with the needs and desires of the surrounding community.

[CLICK HERE TO SIGN UP TO BE EMAILED WITH PROJECT UPDATES](#)

Goals of the Study

- Evaluation of Land Use Scenarios
- Robust Community Engagement
- Development Principles

RECENT SCHEDULE

- February: Study Kickoff
- March 23rd: Advisory Committee Meeting #1

UPCOMING SCHEDULE

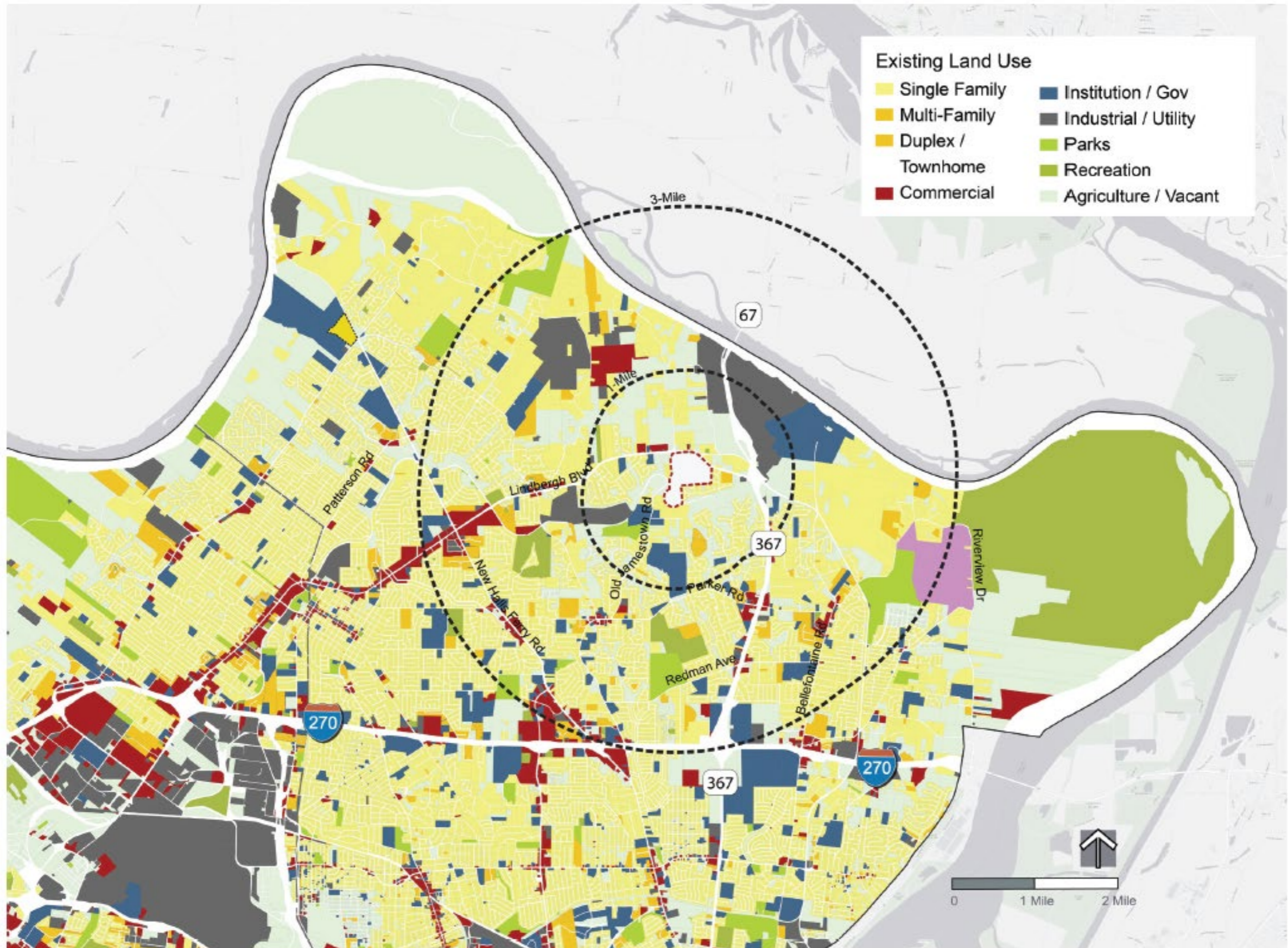
- April: Advisory Committee Meeting #2
- Late April/May: Focus Group Meetings
- June: Public Forum #1

WWW.IMAGINEJAMESTOWNMALL.COM

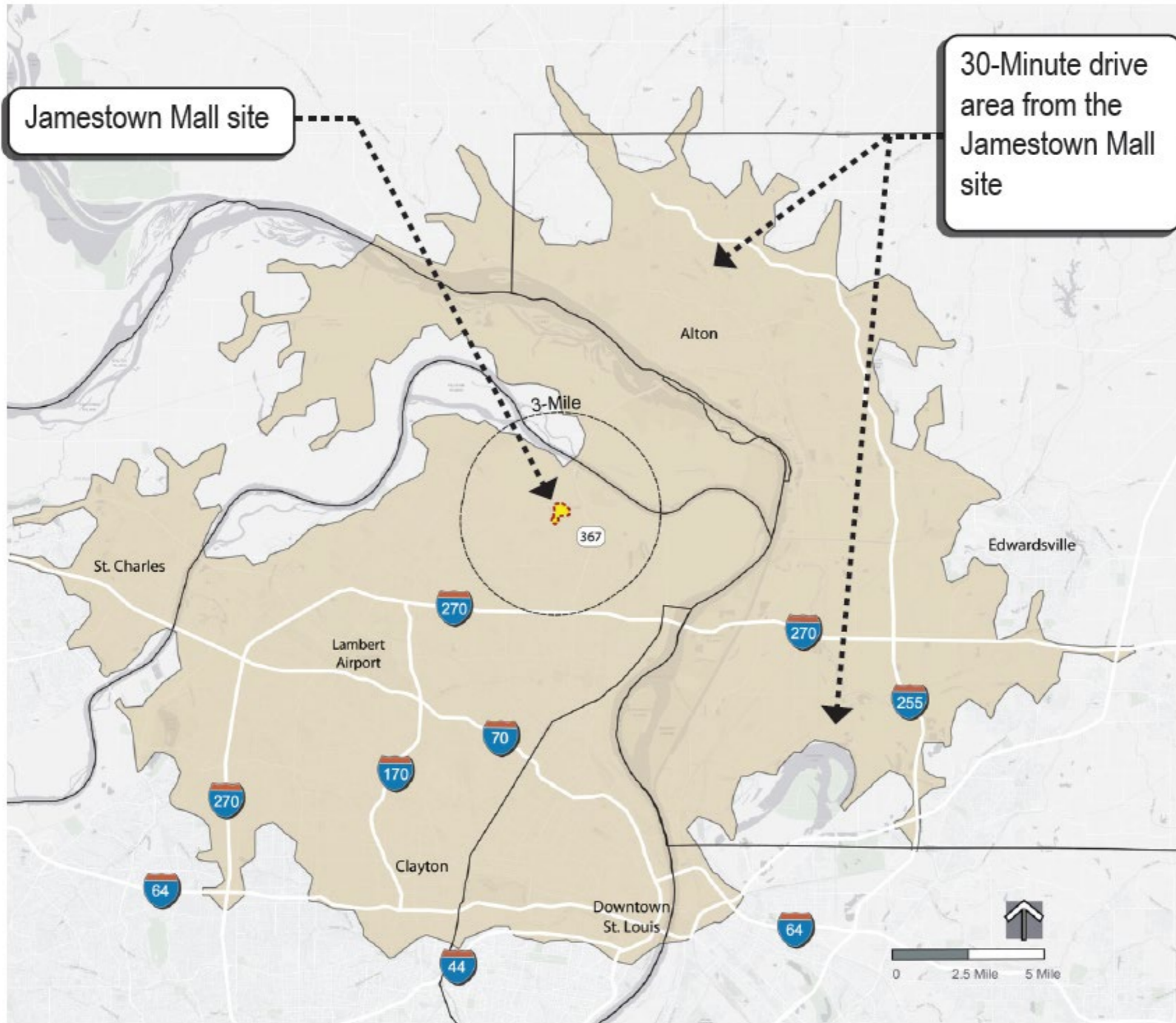
Overview of Site



Overview of Site

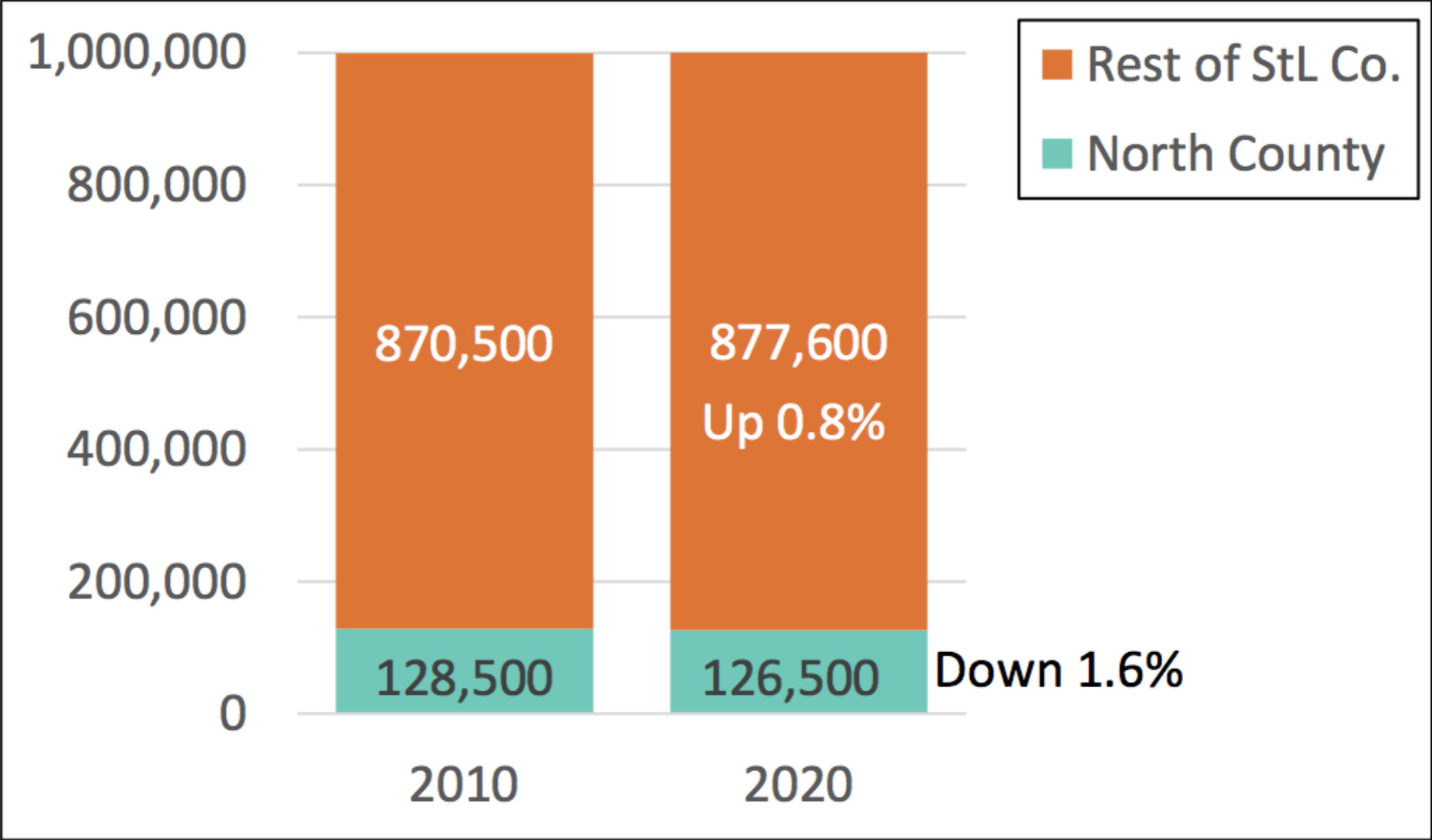


Overview of Site



Background Socio-Economic Data

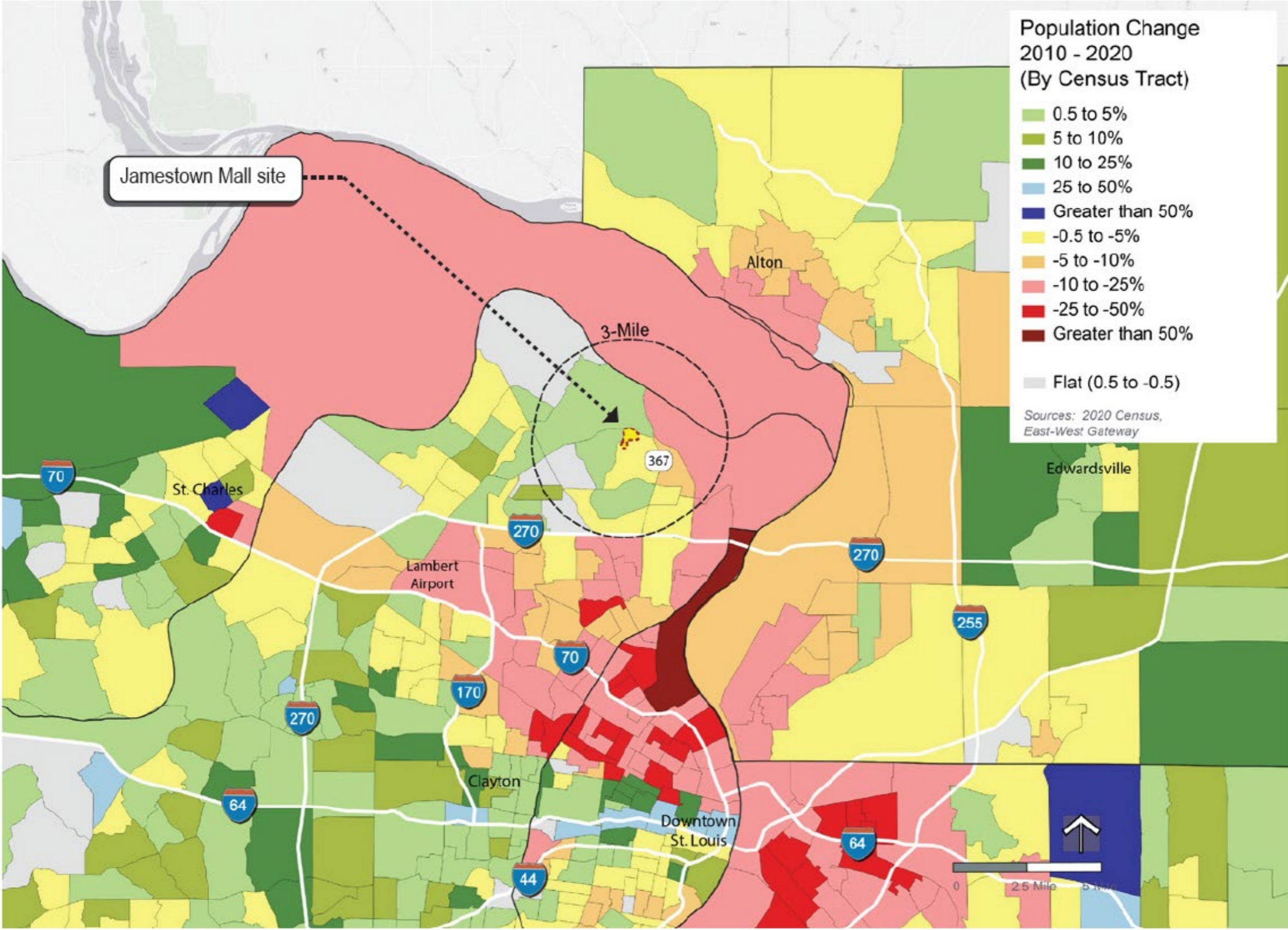
Population 2010 to 2020



NORTH COUNTY VS. REST OF ST. LOUIS COUNTY

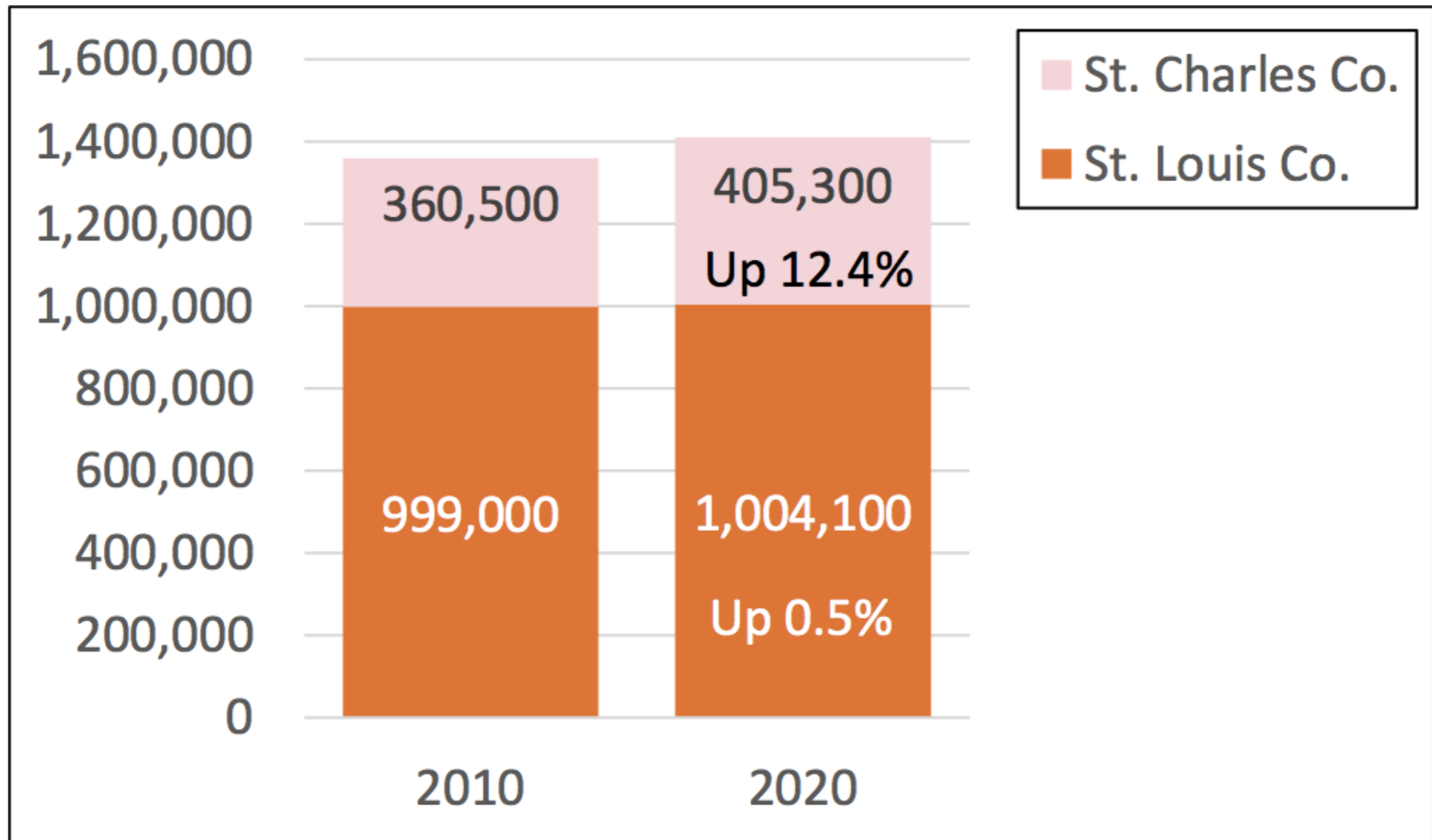
Background Socio-Economic Data

Population 2010 to 2020



Background Socio-Economic Data

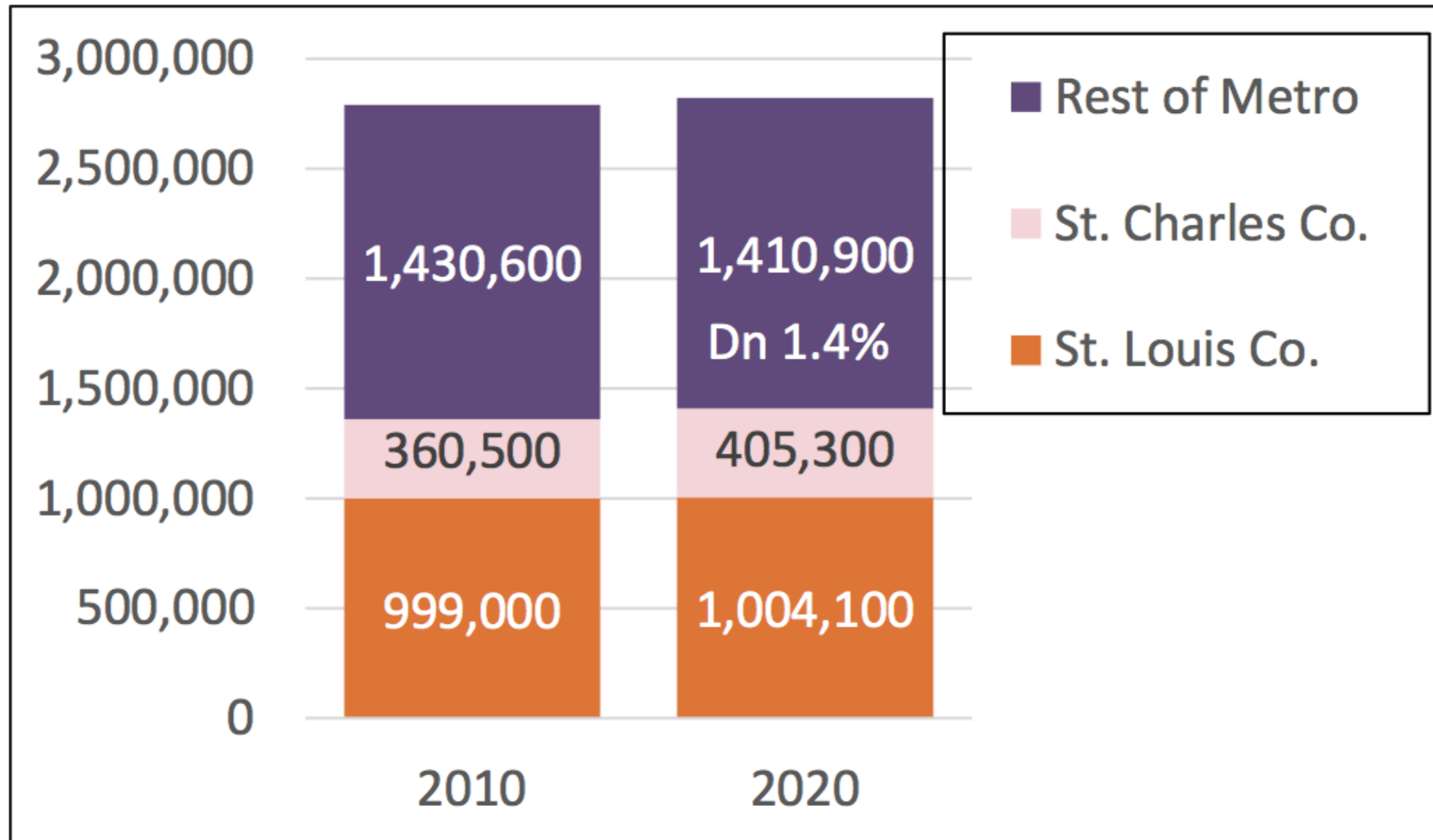
Population 2010 to 2020



ST. LOUIS COUNTY VS. ST. CHARLES COUNTY

Background Socio-Economic Data

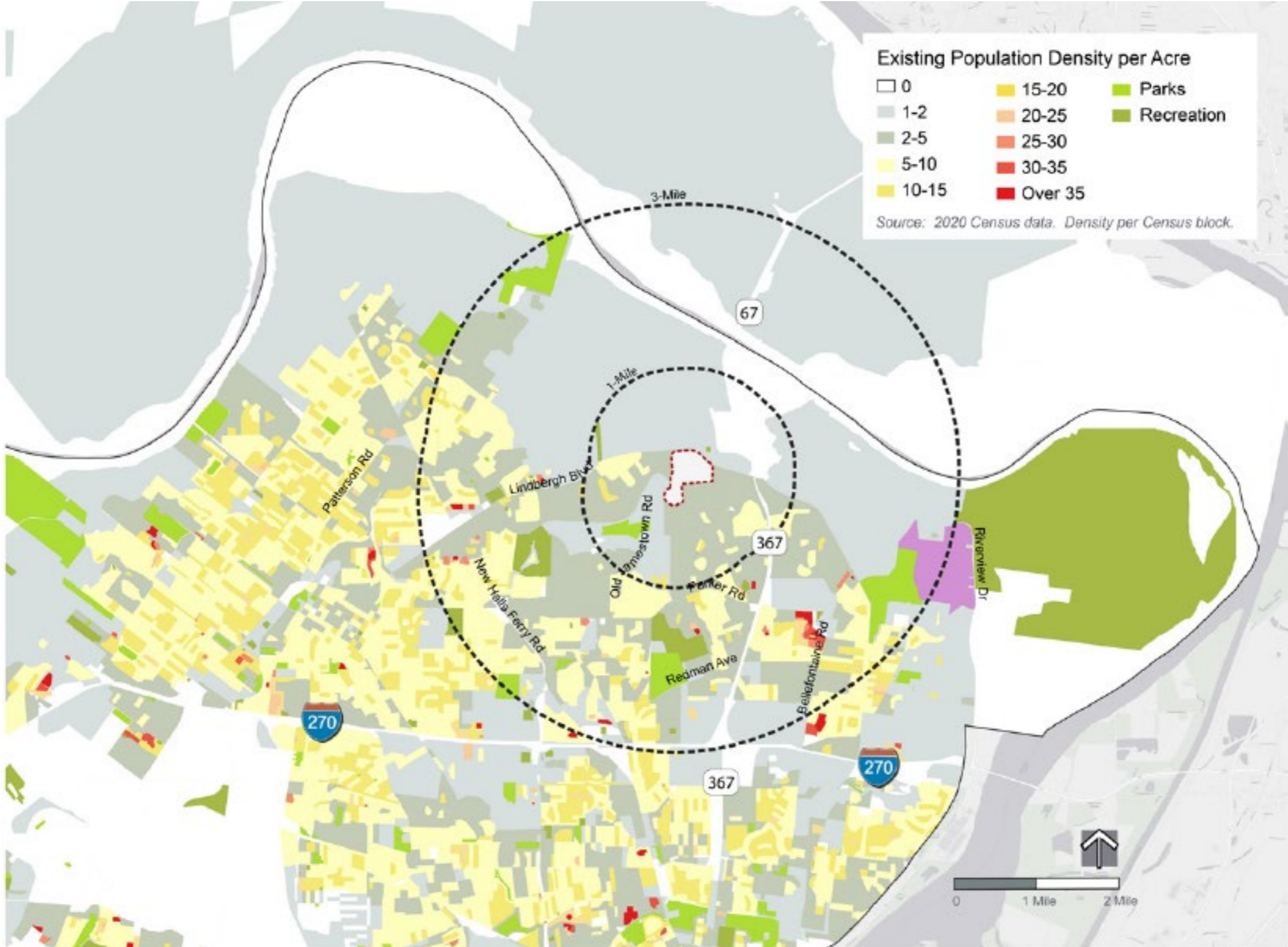
Population 2010 to 2020



ST. LOUIS COUNTY AND ST. CHARLES COUNTY
VS. REST OF METROPOLITAN AREA

Background Socio-Economic Data

Population Density



Background Socio-Economic Data

Population 2010 to 2020

ST. LOUIS METROPOLITAN AREA VS. UNITED STATES



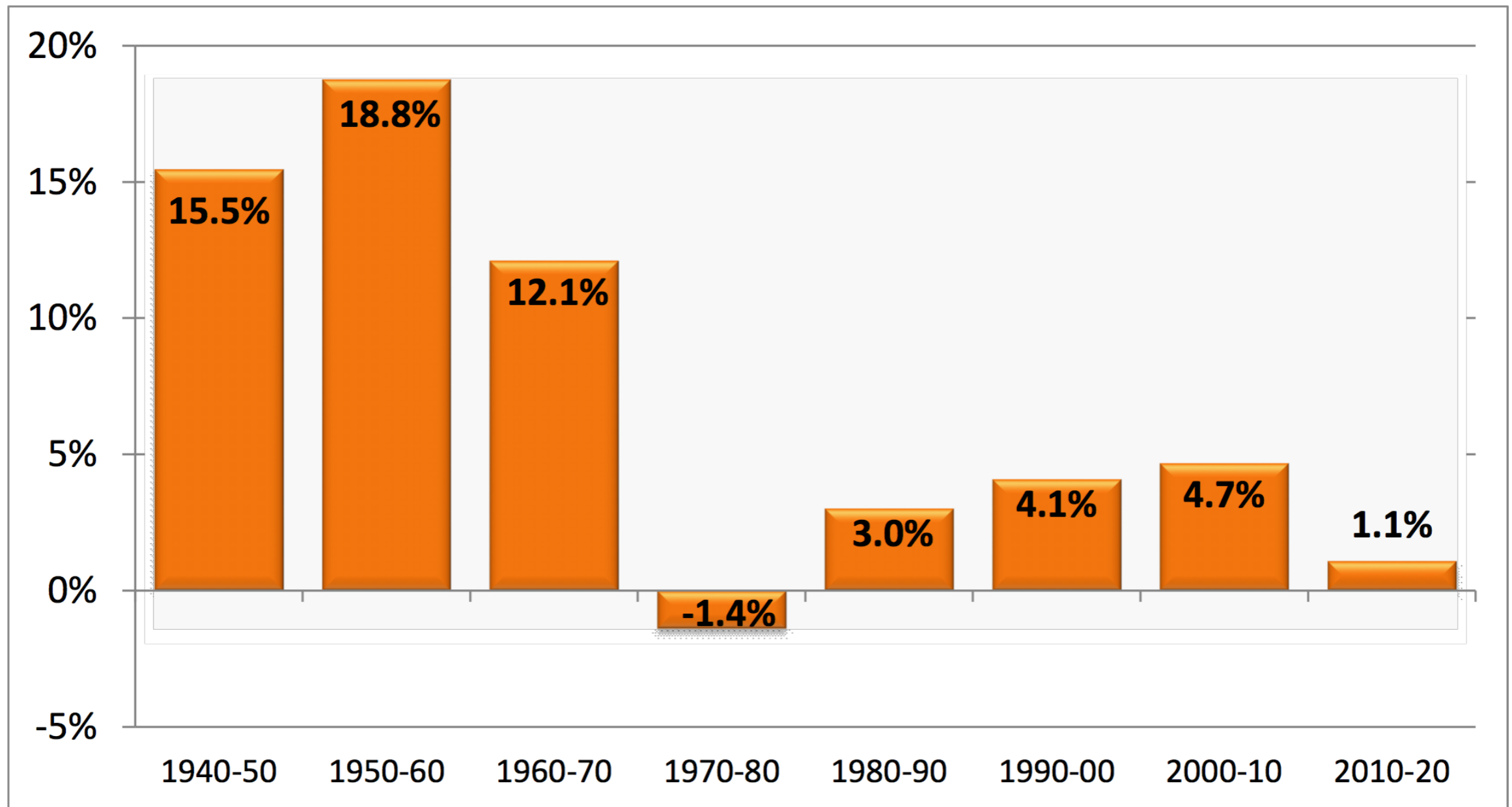
St. Louis Metro



United States

Background Socio-Economic Data

Population Growth Rates 1940 to 2020



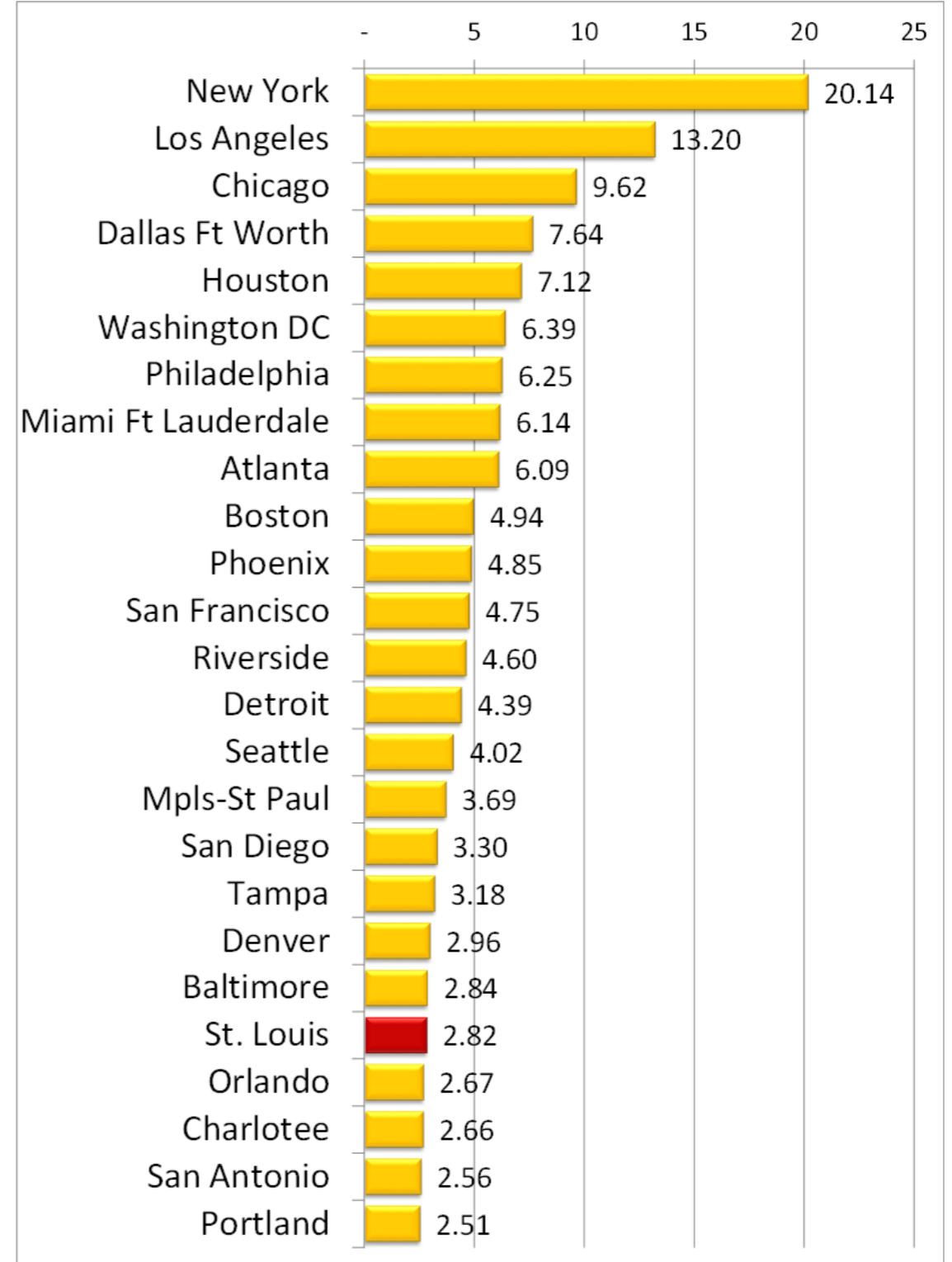
ST. LOUIS METROPOLITAN AREA

Background Socio-Economic Data

25 Largest Metropolitan Areas in USA

(millions of residents)

St. Louis is 21st

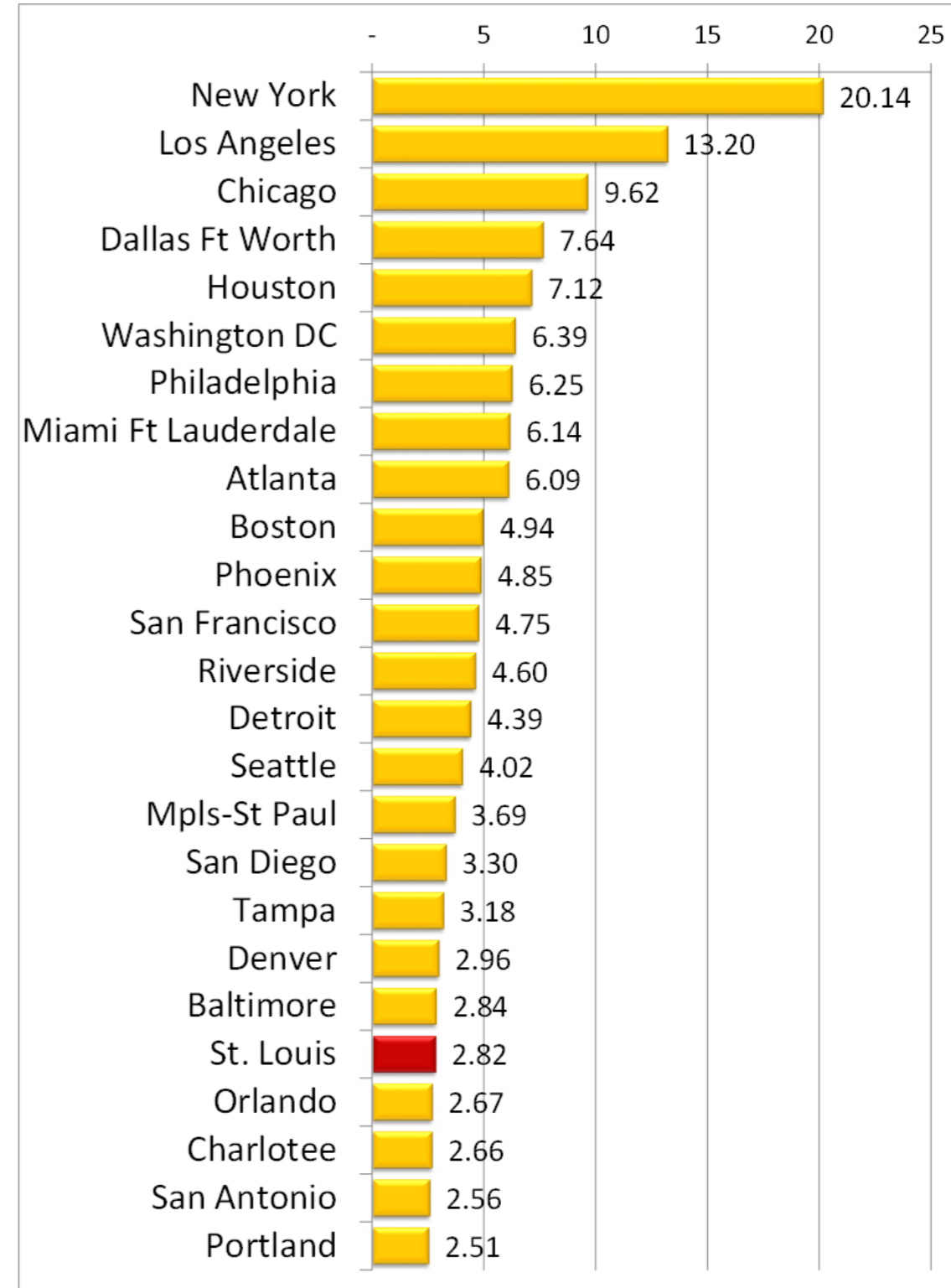


Background Socio-Economic Data

25 Largest Metropolitan Areas in USA

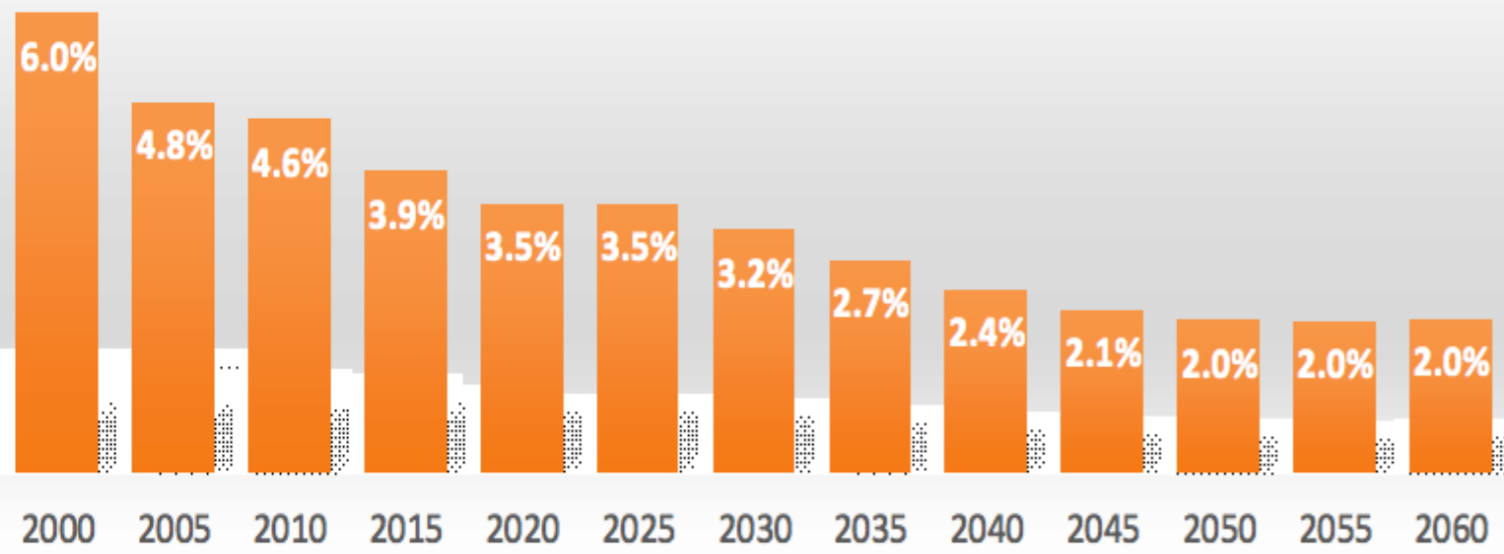
(millions of residents)

St. Louis is 21st



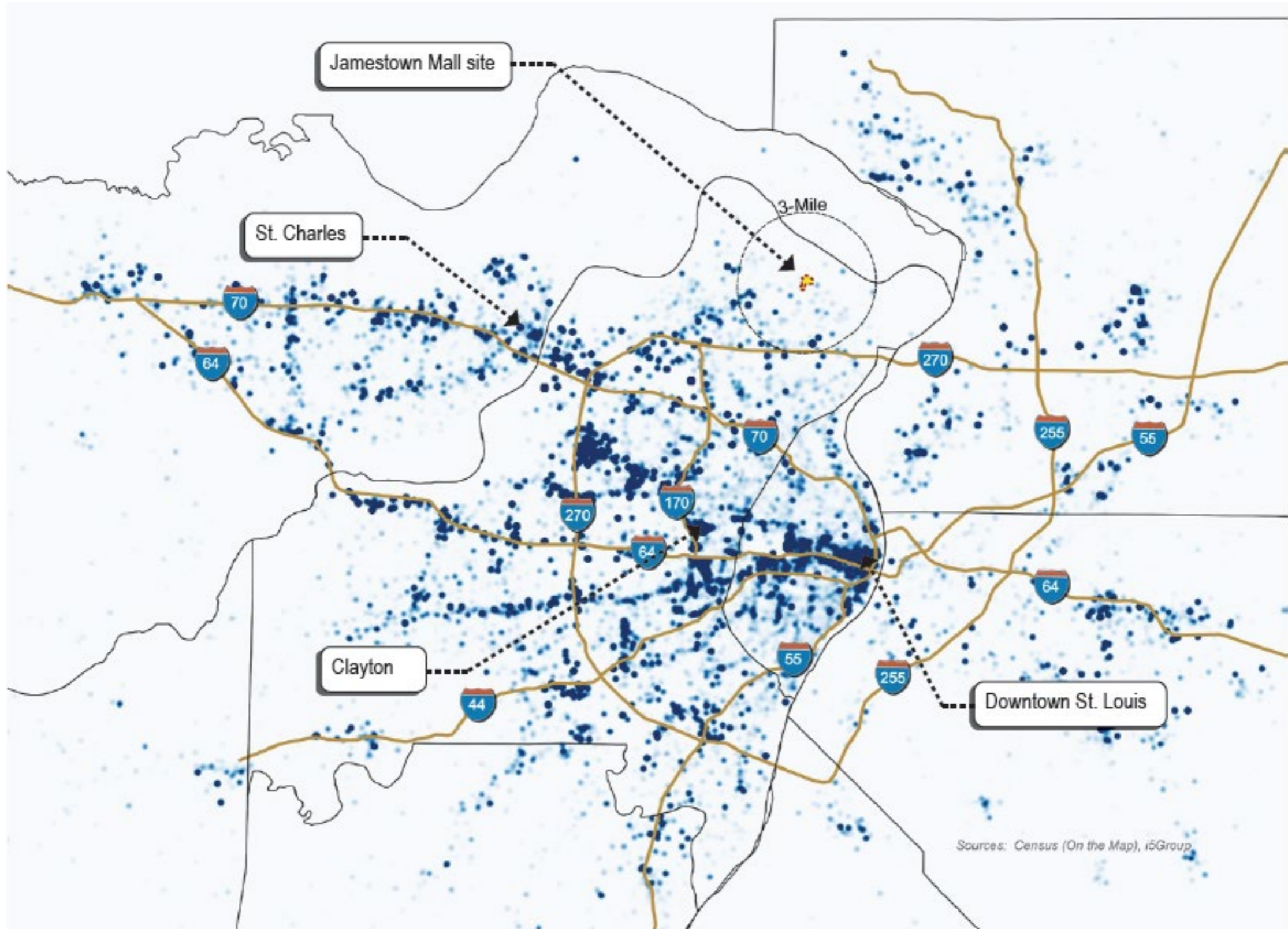
U.S. Population Projected 5-Year Change Rates 2000 to 2060

Source: U.S. Census Bureau



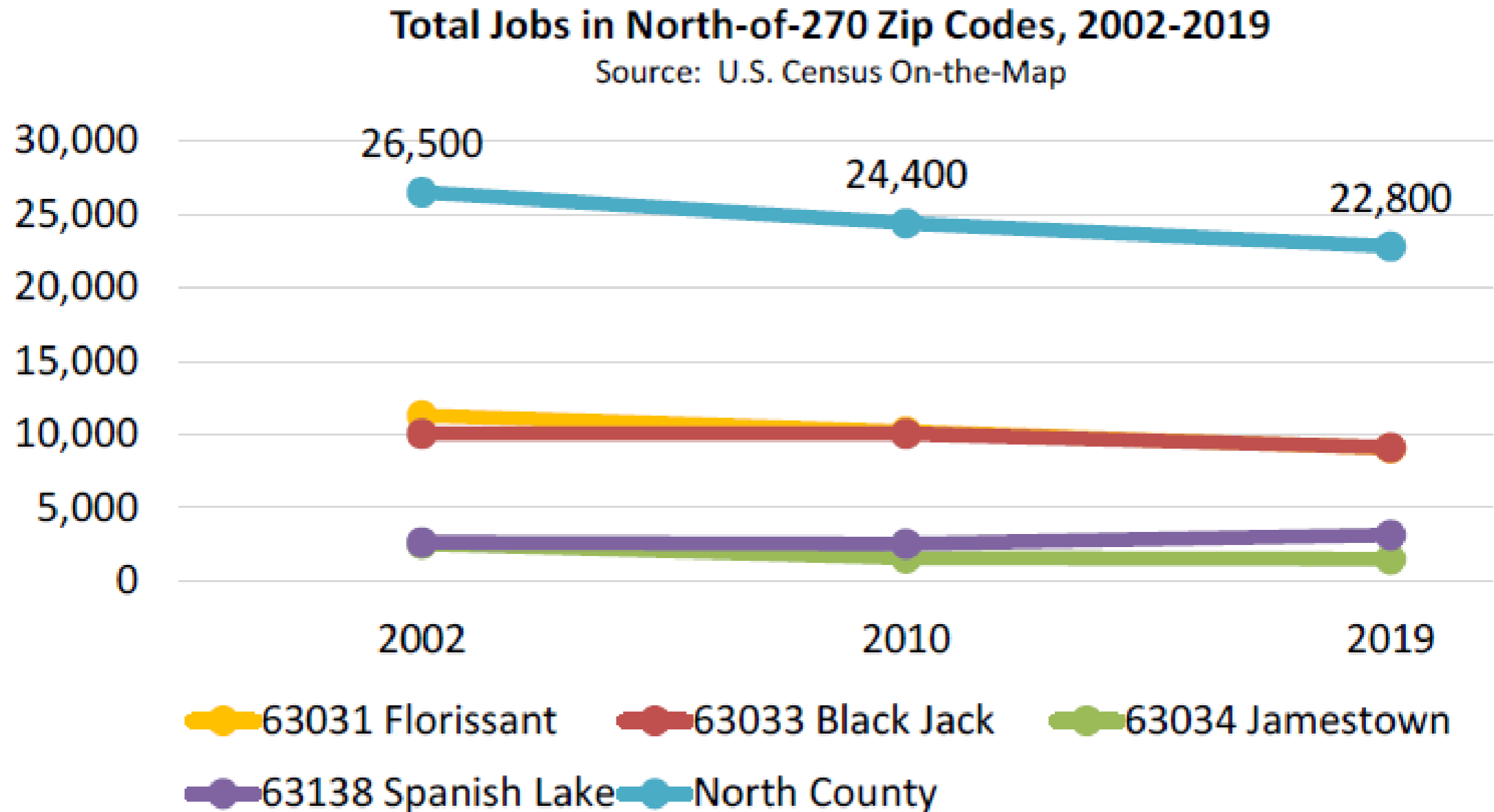
Background Socio-Economic Data

Job Centers



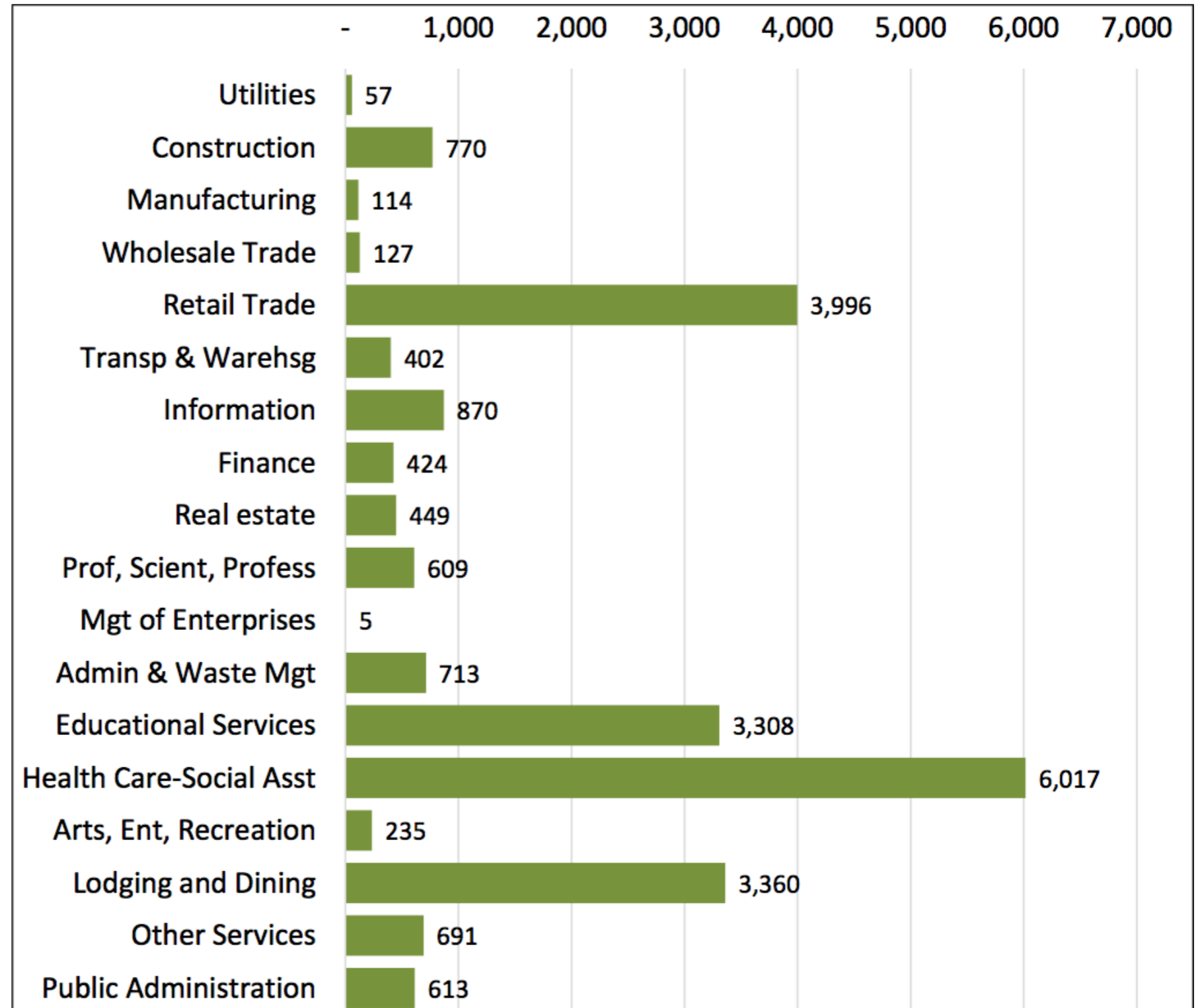
Background Socio-Economic Data

Jobs in North County 2002-2019



Background Socio-Economic Data

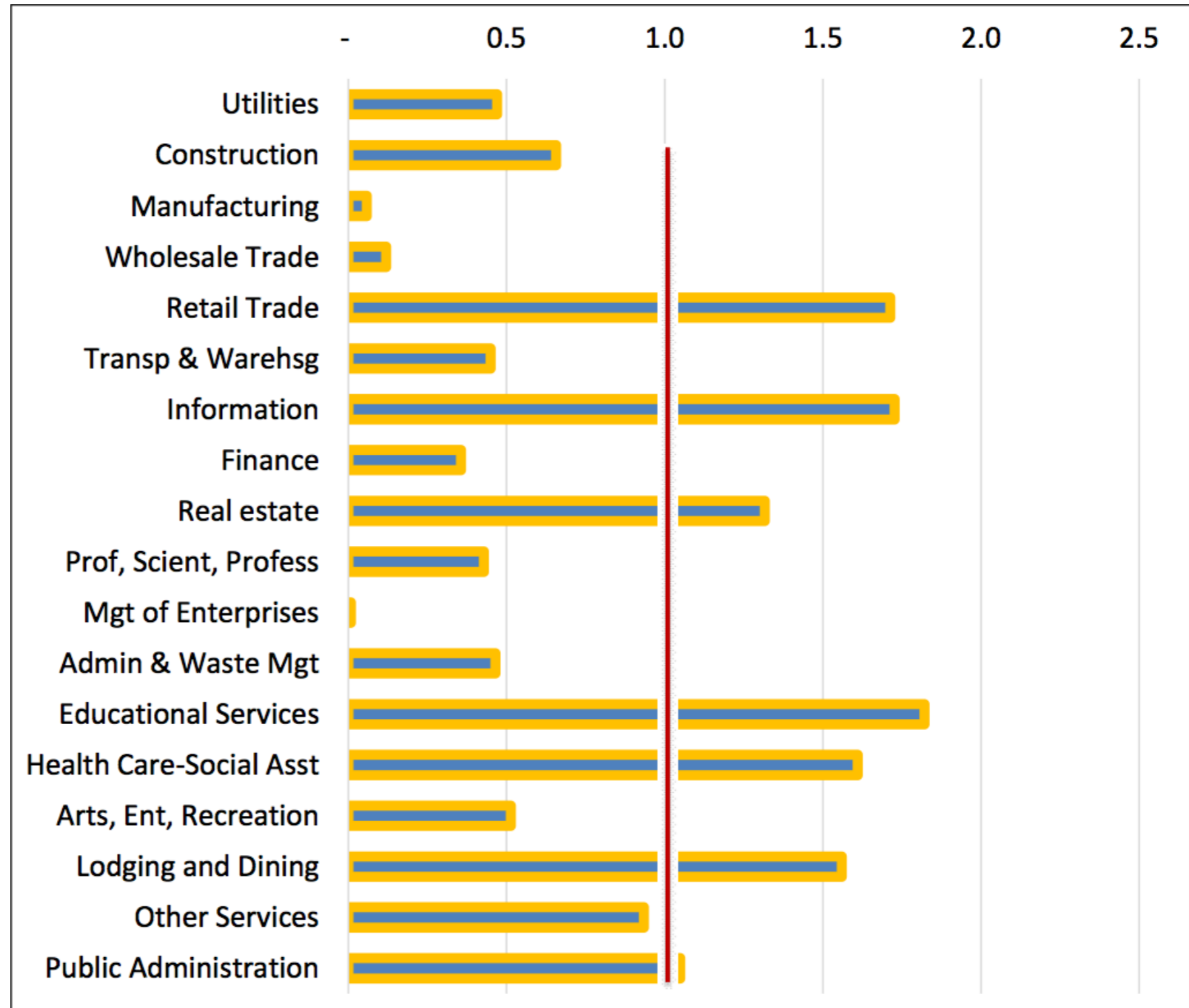
Jobs in North County 2019



Background Socio-Economic Data

Job Location Quotients, 2019

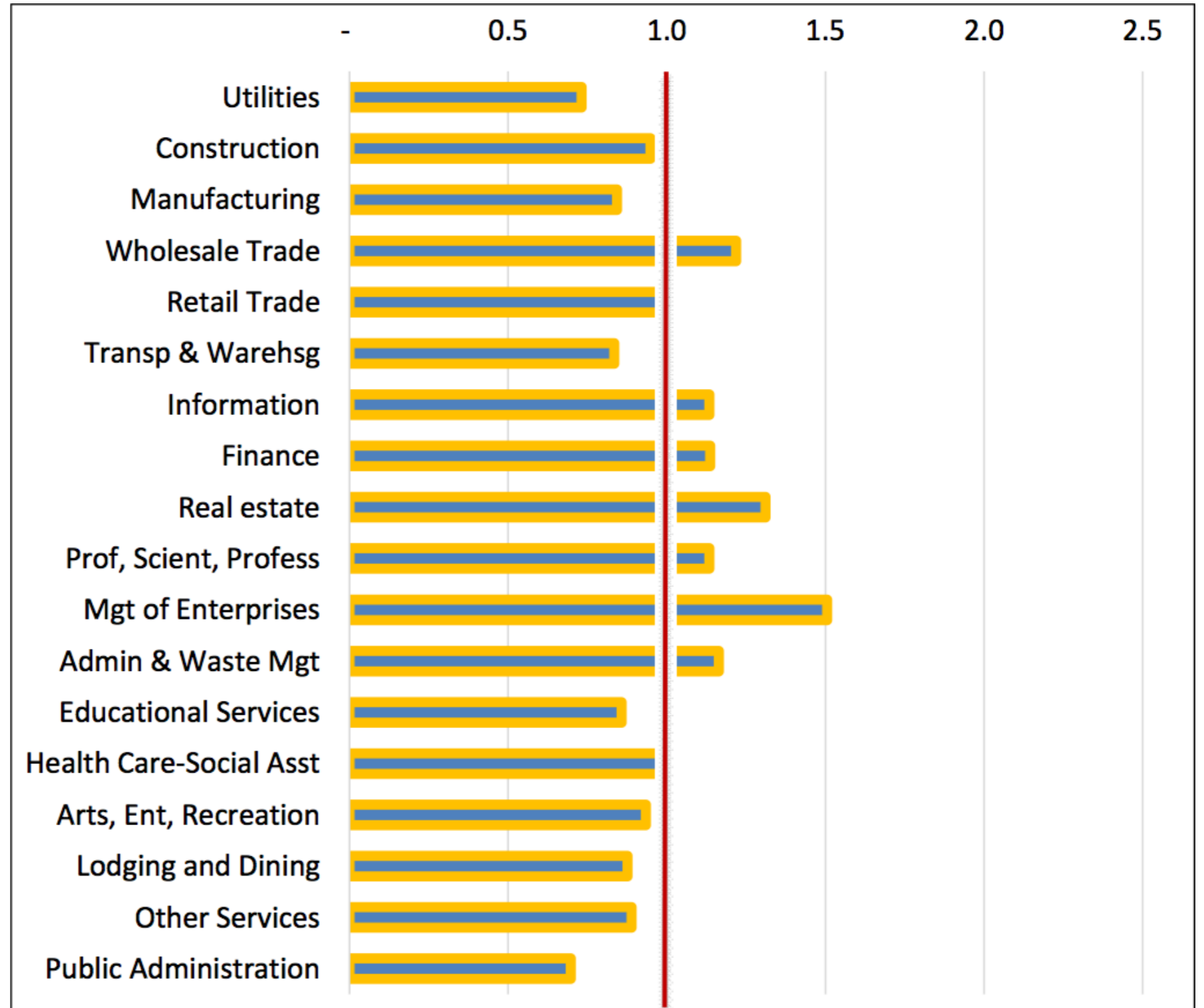
NORTH COUNTY VS.
ST. LOUIS METRO AREA



Background Socio-Economic Data

Job Location Quotients, 2019

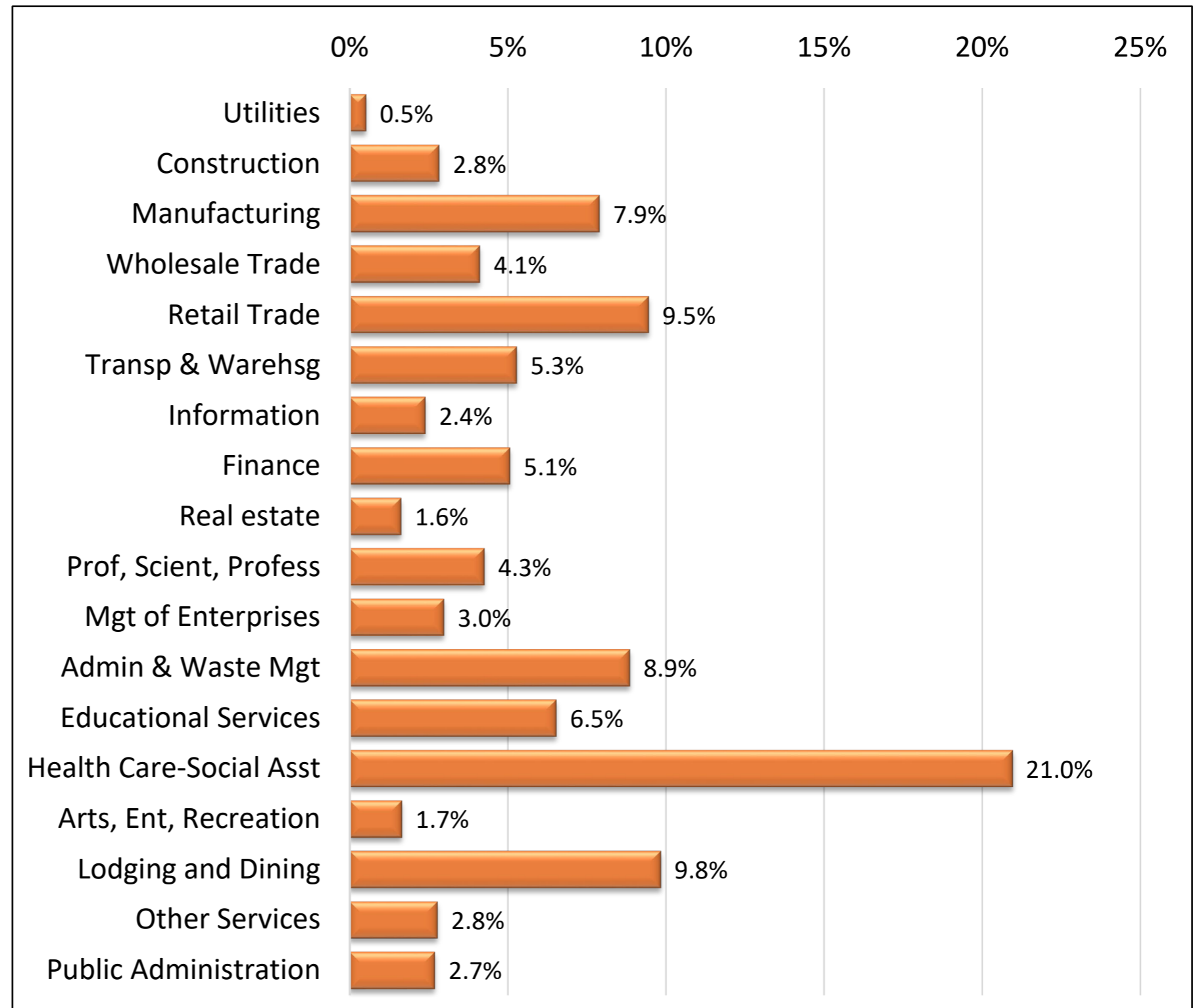
ST. LOUIS COUNTY VS.
ST. LOUIS METRO AREA



Background Socio-Economic Data

Employed North County Residents by Sector of Employment, 2019:

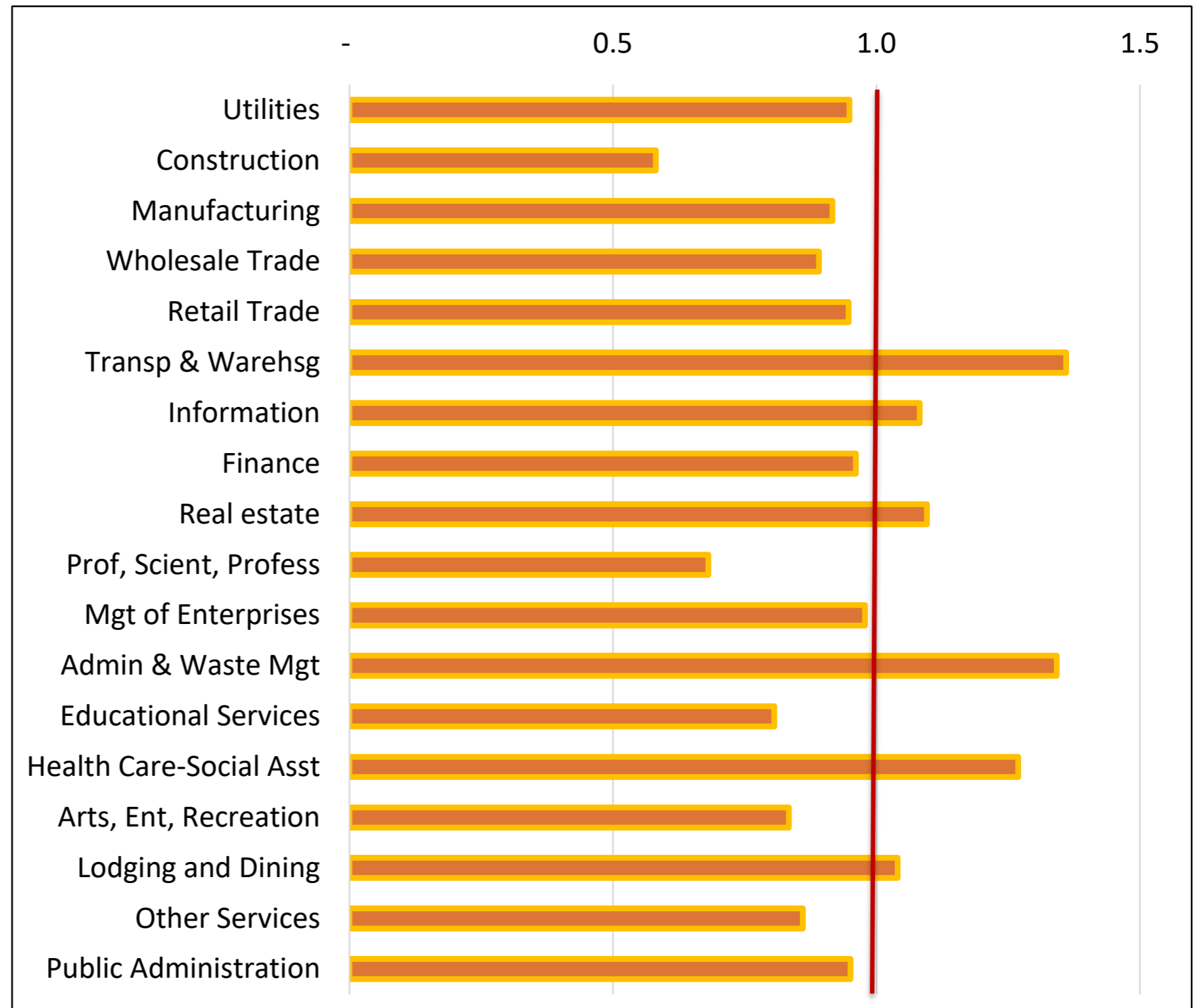
Percent of Employed Residents



Background Socio-Economic Data

Resident Worker Job Location Quotients, 2019

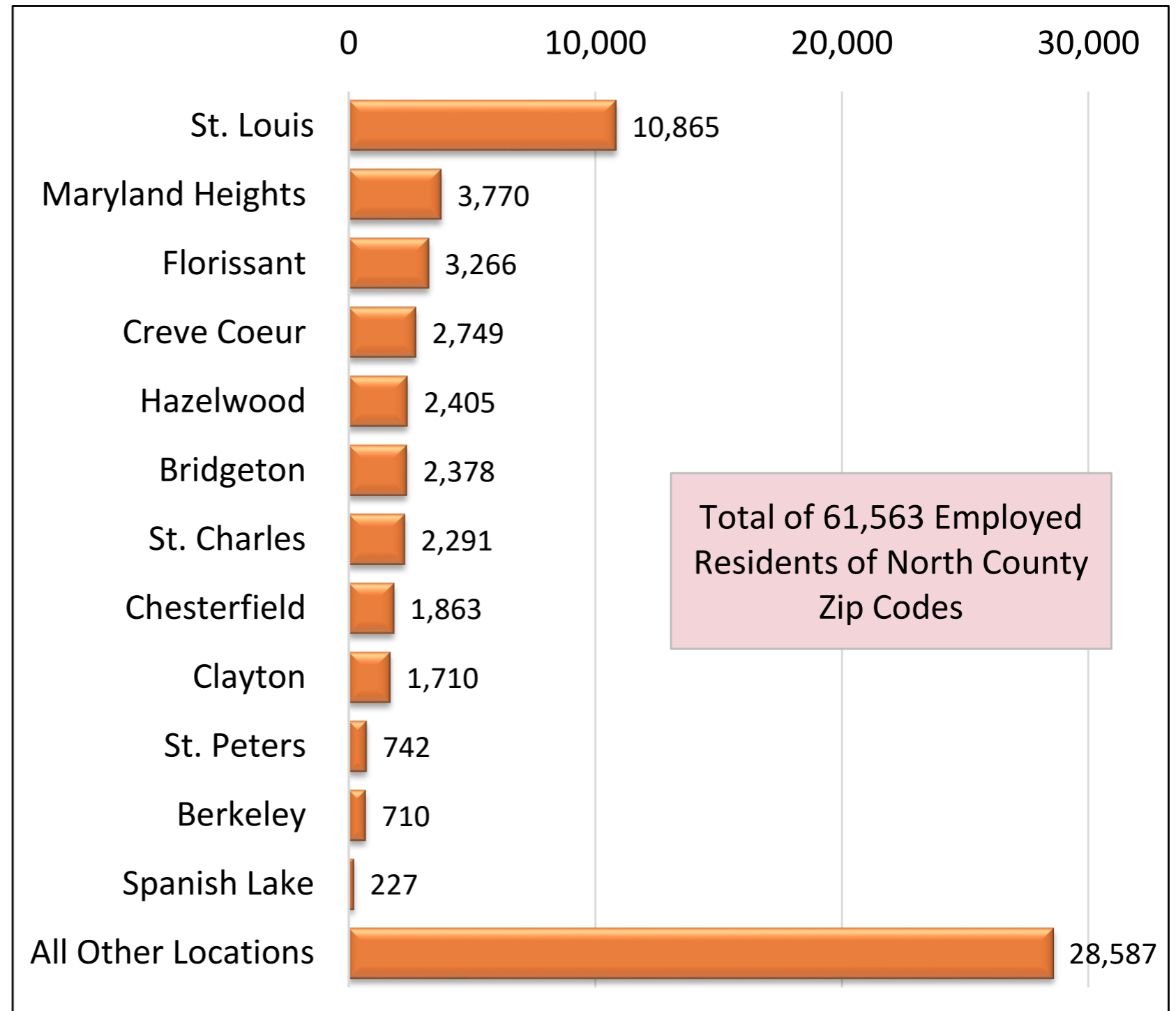
NORTH COUNTY VS.
ST. LOUIS METRO AREA



Background Socio-Economic Data

Work Destinations of Employed North County Residents, 2019

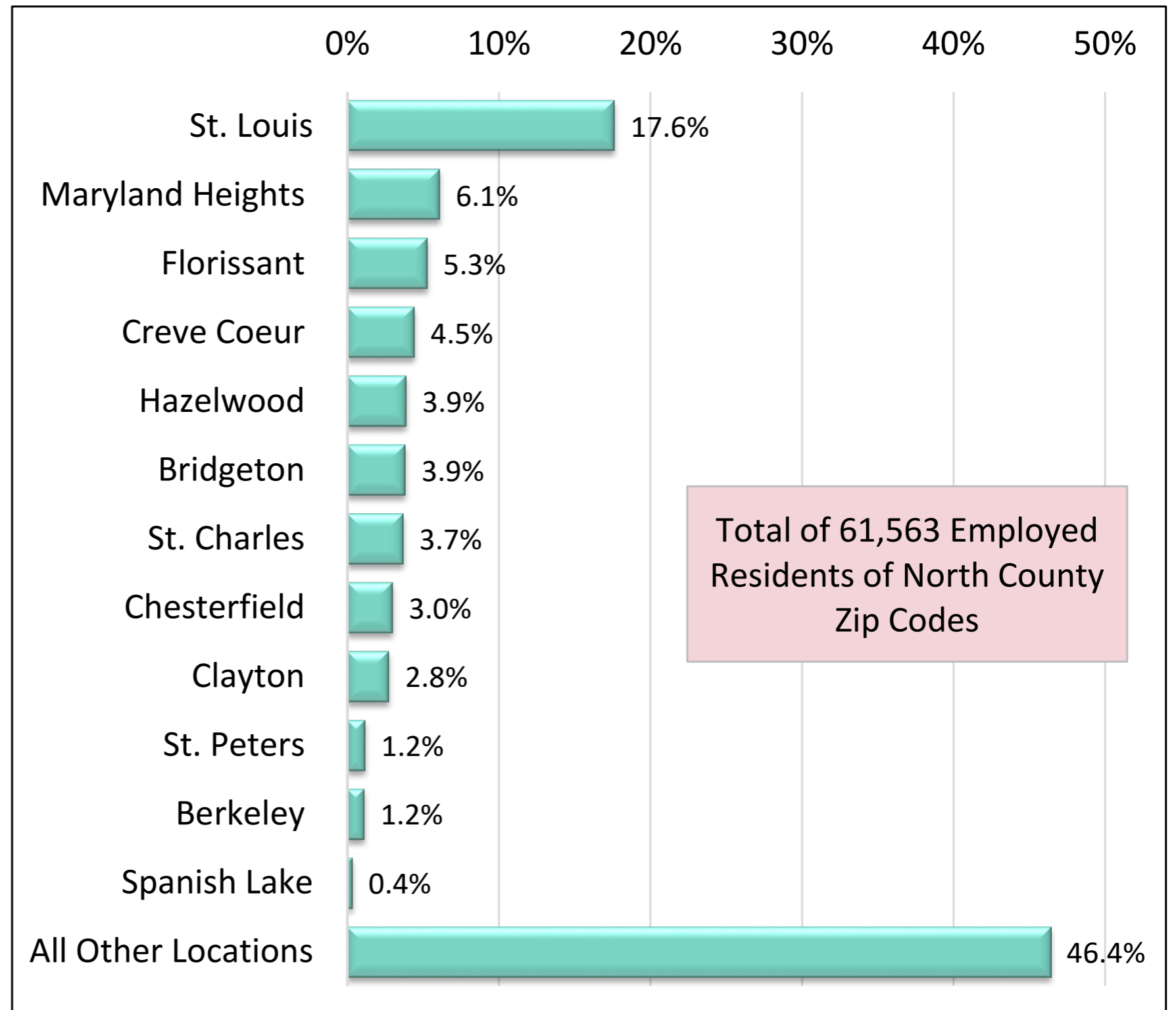
Number of Employed Residents



Background Socio-Economic Data

Work Destinations of Employed North County Residents, 2019:

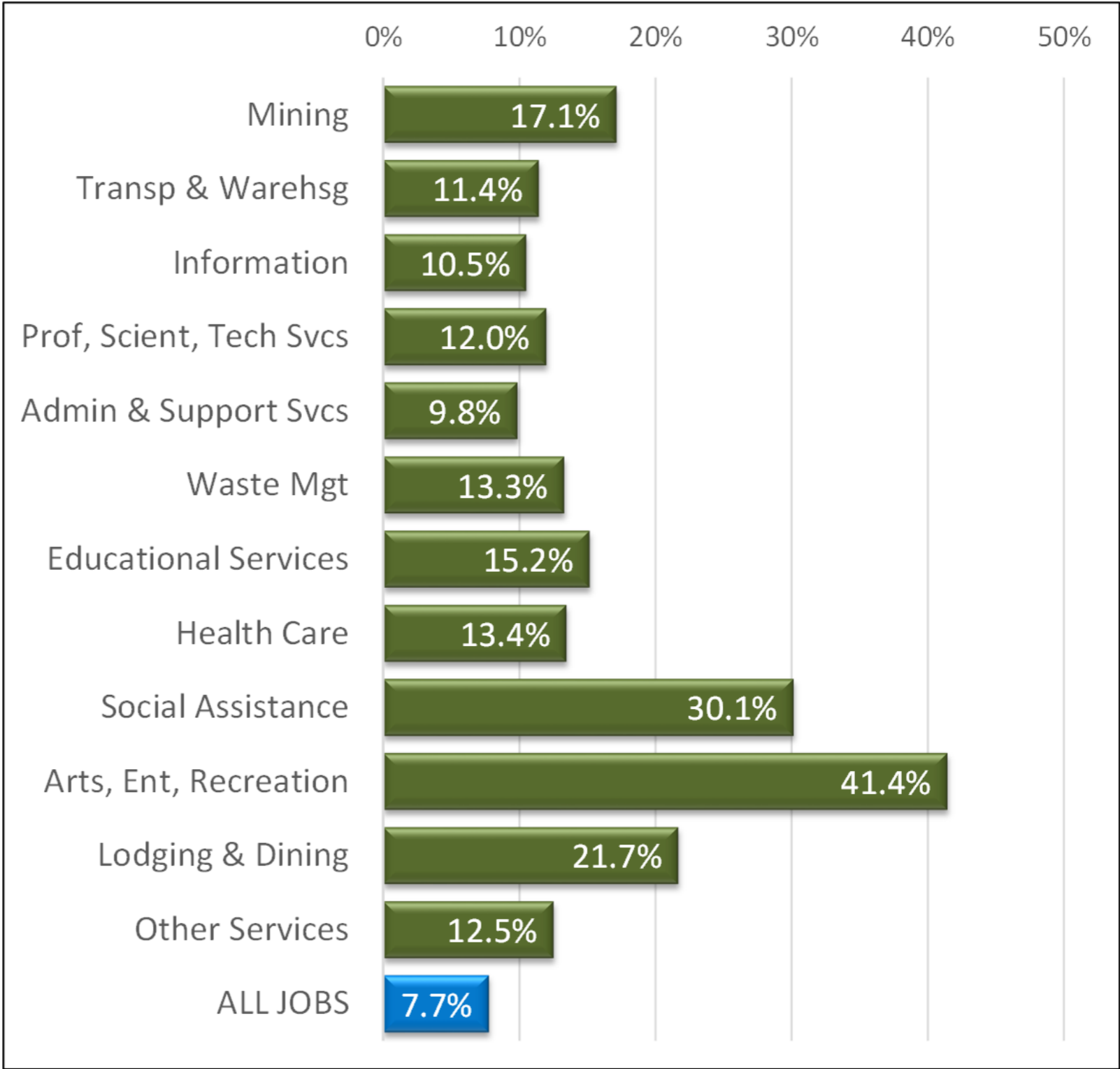
Percent of Employed Residents



Background Socio-Economic Data

USA JOB SECTORS PROJECTED TO INCREASE FASTER THAN U.S. AVERAGE

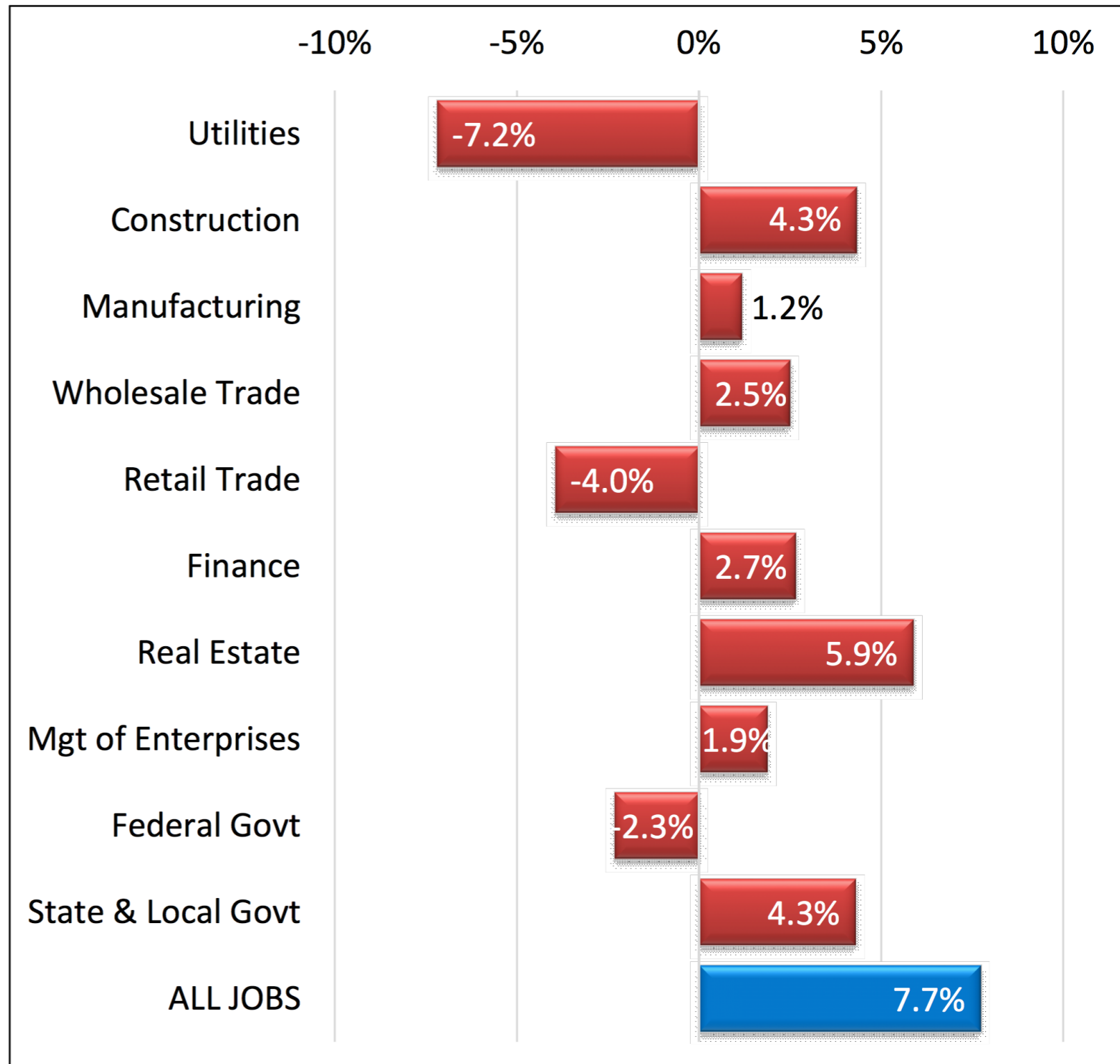
2020 TO 2030



Background Socio-Economic Data

USA JOB SECTORS PROJECTED TO INCREASE SLOWER THAN U.S. AVERAGE

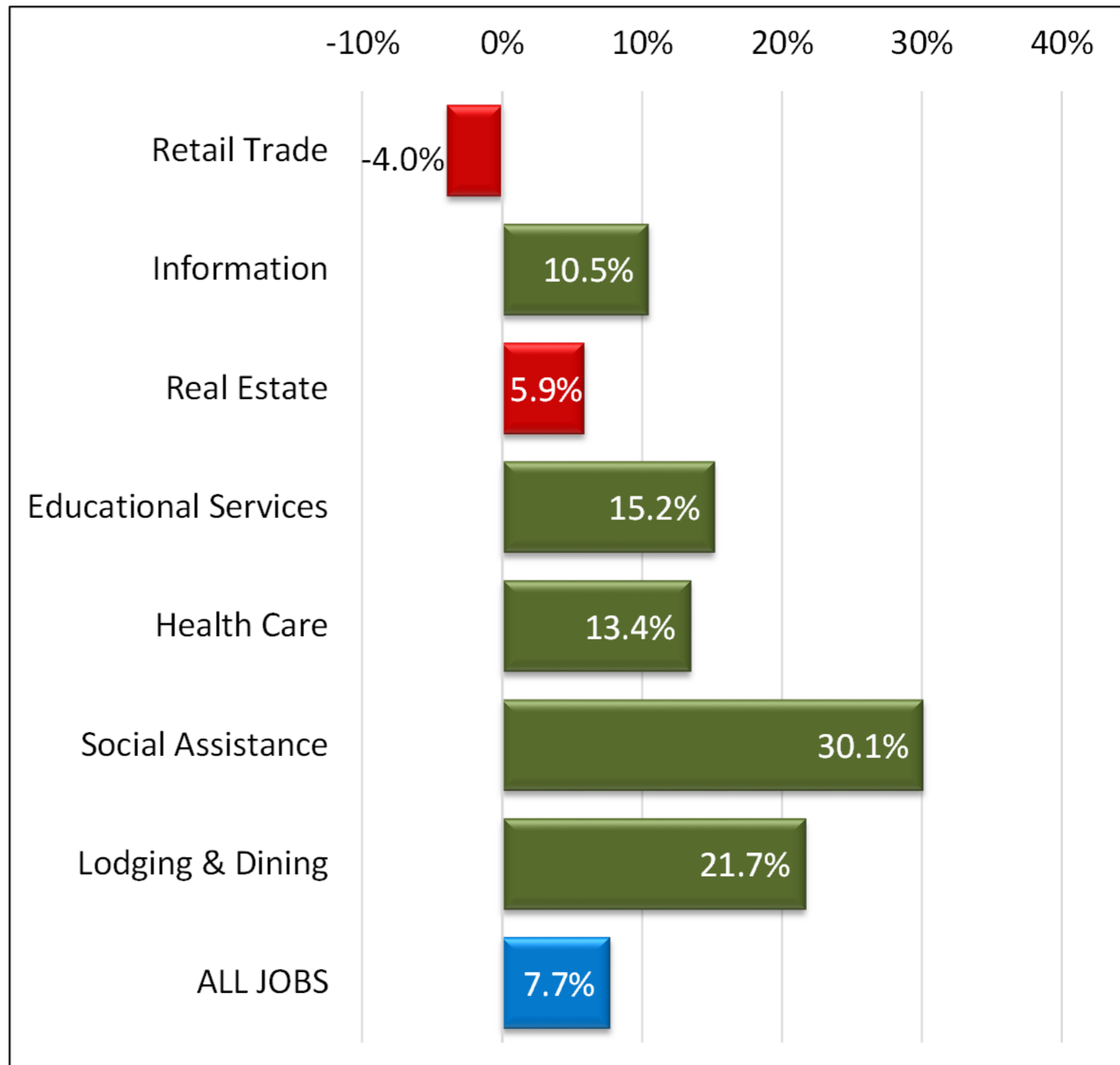
2020 TO 2030



Background Socio-Economic Data

USA JOB GROWTH IN STRONG SECTORS OF NORTH COUNTY

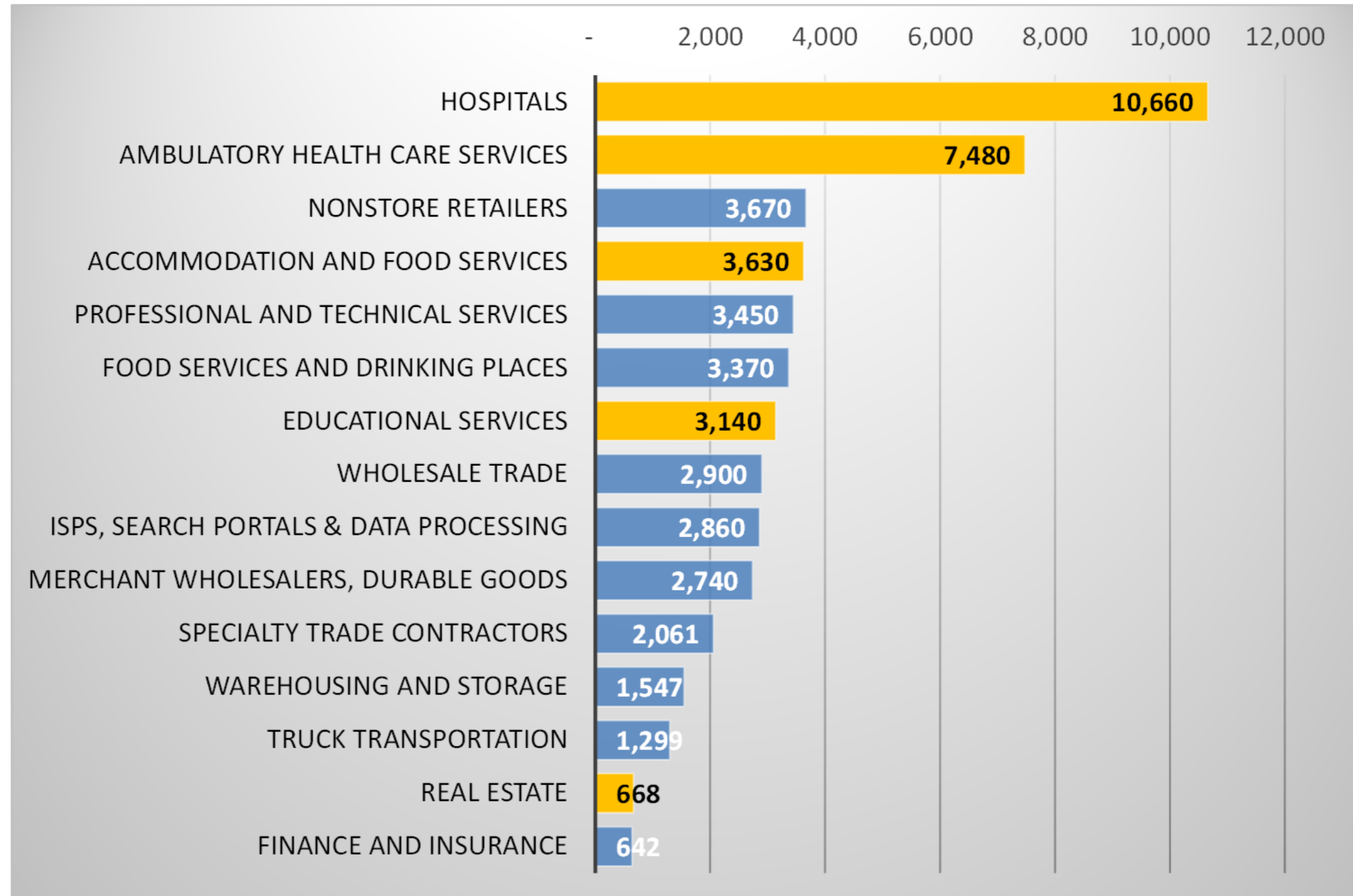
2020 TO 2030



Background Socio-Economic Data

METRO ST. LOUISIS SECTORS ADDING THE MOST JOBS

2018 TO 2028



Background Socio-Economic Data

METRO ST. LOUIS MANUFACTURING JOB CHANGES

2018 TO 2028

US MANUFACTURING JOBS 2020-2030

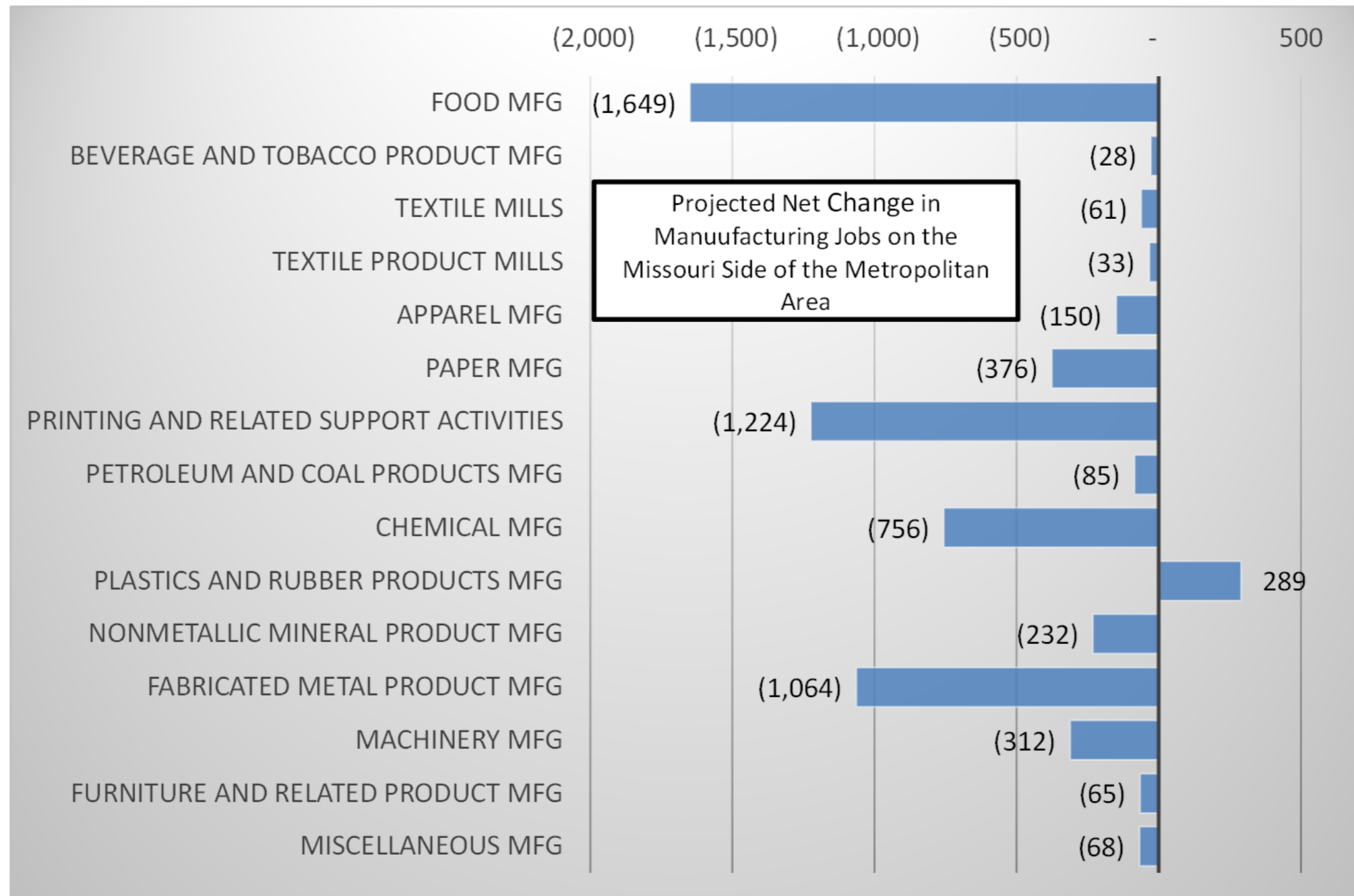
UP 1.2%

MANUFACTURING OUTPUT 2020-2030

UP 19.3%

USA OUTPUT

UP 24.1%



Background Socio-Economic Data

Setting the Stage for the Initial Land Use Scenarios

Population growth, generally, is slowing down

- St. Louis area is not in a significant growth cohort
- Housing production will also be challenged
- Retail demand will stagnate generally; perhaps decline in North County
- But, Jamestown Mall offers a lot of land for new housing and attracting population to St. Louis County and to North County

Jamestown Mall is not “top of mind” for economic development of metro St. Louis

- On the fringes
- But 142 acres is very attractive for economic development
- Many job growth sectors are favored in North County

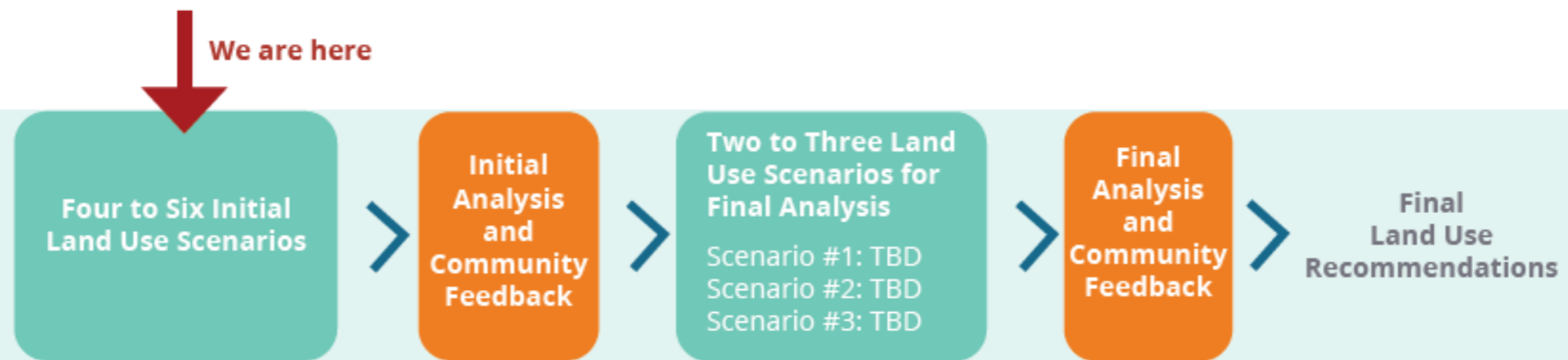
Stakeholder Conversations

Setting the Stage for the Initial Land Use Scenarios

Conversations with Economic Development Stakeholders

- Missouri Partnership
- Greater St. Louis, Inc.
- Ameren
- North County, Inc.
- Gundaker Commercial
- Chapman Ventures, LLC
- St. Louis Economic Development Partnership
- St. Louis County Department of Planning

Approach



Between now and the community forum in June, initial analysis of the scenarios will take place.

INITIAL ANALYSIS

The preliminary analysis and evaluation for the six scenarios will be based on:

- Regional Economic Trends
- Regional Business And Employment Concentrations
- Demographic And Population Trends
- Housing Trends
- Labor Force Needs
- Place-Making Opportunities
- Job And Local Business Creation
- Return On Public Investment
- Existing And Potential Changes In Zoning
- Transportation And Parking
- Existing Utilities
- Market Area Supply For Each Use
- Market Area Demand For Each Use

COMMUNITY FEEDBACK

The planning team will begin conversations with the community about the scenarios.

Small Group Meetings

8-12 small group meetings starting in late April with subdivisions, neighborhood organizations and other groups. Ten to fifteen attendees per meeting to allow for a robust, thorough group discussion.

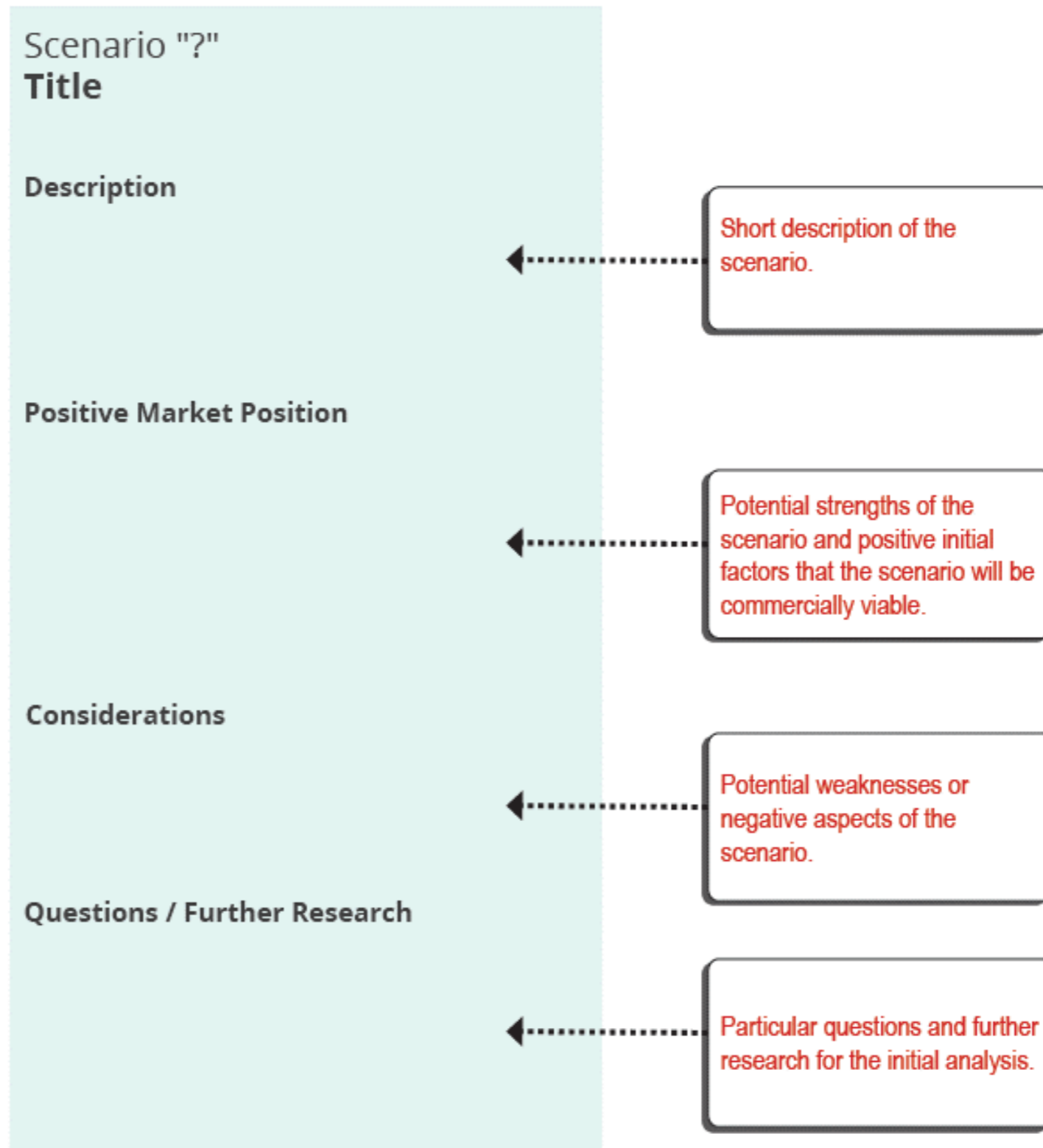


Public Forum #1

Open house style forum for the whole community in June to review and provide feedback on the initial scenarios.



Format of Land Use Scenarios Descriptions



Land Use Scenarios

Scenario "A"

JAMESTOWN ACRES ESTATES

Description

Large scale subdivision or set of subdivisions of “middle housing” affordable to middle and working class households. Senior housing component. Village-scale retail shops and restaurants.

Positive Market Position

High quality, new housing in suburban format for up-and-coming households and seniors; replacement for older North County housing. A competitive product when compared to new housing in St. Charles County and Metro East.

Considerations

Extremely sluggish regional net population growth, could leave older North County housing (that is less attractive to modern home-buyers) behind.

Questions / Further Research

- Opportunity for mix of uses, including some neighborhood retail. Percentages to be determined.
- Could the residential mix include multi-family. Mix of for-sale and rental.

Scenario "B"

NORTH LINDBERGH CORPORATE CAMPUS

Description

Corporate campus with office buildings, parking, and amenities. Major corporation or two attracted to or expanding in greater St. Louis.

Positive Market Position

Available “inventory” of large land area for regional economic developers; high value opportunity for St. Louis County; the number one strongest economic sector in metro St. Louis is “management of businesses and enterprises.” St. Louis is a headquarters town—build on that strength.

Considerations

Corporate candidates for site few and far between, long wait for development, and persistent holding costs.

Questions / Further Research

- Opportunity for complementary mix of uses including neighborhood retail, small business space.

Scenario "C"

NORTH LINDBERGH COMMERCE HUB

Description

Advanced high tech manufacturing (clean) and/or data center. High quality and higher paying jobs. Draw on large metropolitan labor force as well as academic and corporate research.

Positive Market Position

Growing demand from center of USA. Competitive strength of greater St. Louis, including ongoing tech skill upgrades of the metro labor force (e.g., LaunchCode). Expansion space for companies graduating from incubators. Available electric power.

Considerations

Regional competition, site constraints, zoning changes may open door to less desirable uses. Traditionally, data centers are not huge employers.

Questions / Further Research

- Narrowing down the potential type of manufacturing.

Land Use Scenarios

Scenario "D" **NORTH LINDBERGH LOGISTICS CENTER**

Description

Warehousing and distribution center with trucking for movement of goods into and out of greater St. Louis and a large part of the Midwest.

Positive Market Position

Growing demand from center of USA. Competitive geographical strength of greater St. Louis. Previous interest from developer.

Considerations

Competition from, particularly, Metro East. Truck traffic. Some distance from interstate highways. No railroad adjacency. Community concerns.

Questions / Further Research

- Saturation of the regional logistics market.
- Lower quality, lower paying jobs.
- Compatibility with current land uses.

Scenario "E" **CENTER FOR CRITICAL TECHNOLOGIES**

Description

Research park with consortium of area universities (like UMSL) with concentrations of research, development, post-docs, etc., on cutting edge technologies outside the bio-ag sectors.

Positive Market Position

Expansion space for Cortex and other incubator graduates. Tech skills advancing rapidly in greater St. Louis with LaunchCode, STEM programs at universities. Increased opportunity to retain technological advances in St. Louis.

Considerations

Potential overlap with other regional centers such as Cortex or 39 North. Likely a long wait for full development and persistent holding costs.

Questions / Further Research

- Scale of growth prospects. How big is the market potential?

Scenario "F" **GREEN ACRES AG AND ENERGY CENTER**

Description

Intensive outdoor and indoor farming of high value food products; alternative energy field (wind and solar); testing sites for commercialized bio-ag technologies.

Positive Market Position

Growing demand from center of USA. Competitive strength of greater St. Louis in USA agriculture heartland. Supportive infrastructure for ag entrepreneurs in St. Louis (Helix, Danforth, Cortex). Alternative to California and foreign nations for high value food products. Available electric power. Ample local water/irrigation sources.

Considerations

Not many jobs. Some jobs high quality, high paying; some entry-level jobs, low paying. Not high value land uses. Tax status—commercial or agricultural.

Questions / Further Research

- Compete with California, etc.
- Reduced transportation costs to markets.

Not Making the Cut (Honorable Mentions)

THE SHOPPES AT JAMESTOWNE

Description

Large scale retail complex anchored by big boxes and national brands.

Reasons for Not Making the Cut

Saturated North County retail supply, unserved by interstate highway, lack of adjacent population.

SPORTS 'N' SHOWS PARK

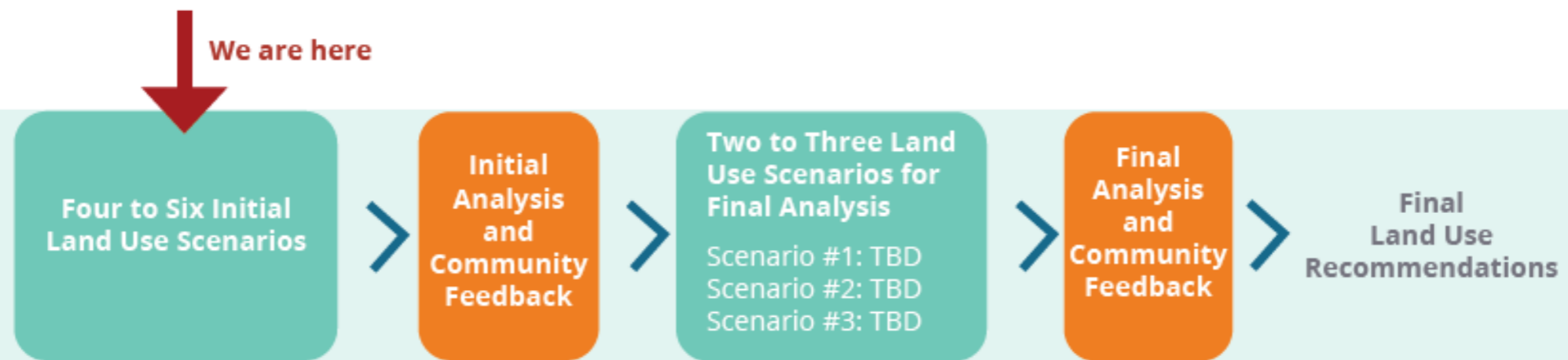
Description

High quality sports and outdoor recreation complex.

Reasons for Not Making the Cut

There are many similar places in the St. Louis region.

Approach



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INITIAL ANALYSIS

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Public Forum #1

Open house style forum for the whole community in June to review and provide feedback on the initial scenarios.



Questions / Discussion

The roll-day today is just a brief summary of each scenario. Between now and the Public Forum (June), we'll be doing the initial analysis and evaluation. However, what are your initial impressions:

What do you like about the scenarios?

What concerns do you have?

We've listed some items for questions/further research. What questions/further research would you like to see?

Development Principles (Take Home Exercise)

What other Development Principles are important to you?

Working list:

- Place-Making Opportunities
 - Architecture (Aesthetics)
 - Walkability
 - Community Space
- Job Creation
- Return on Public Investment
- Local Business Creation



Next Steps

- **Advisory Committee Bios**
- **Look for Advisory Committee feedback form:**
 - Scenarios Comments
 - Development Principles
- **Small Group Meetings**
- **Next Advisory Committee Meeting**
 - TBD. In Person. Mid-Late May (Potentially Tuesday, May 24th)

THANK YOU!