

Market Analysis and Feasibility Study

DECEMBER 2022

*Report from the Planning Team
(12/16/2022)*



Acknowledgments

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Thank you to everyone who was involved in the process. Special thank you to the Saint Louis Zoo for hosting the two public forums, Black Jack Fire Protection District and Zion United Church of Christ for hosting small group discussions, and St. Louis County Councilwoman Shalonda Webb.

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Scope of the Market Analysis and Feasibility Study

Evaluation of Land Use Scenarios

Six land use scenarios were initially developed for analysis. Based on the initial market analysis and input from the community, three land use scenarios were chosen for final analysis.

While this report recommends one preferred land use scenario, the result may have included two to three land use scenarios that reflect community feedback, are commercially viable, and provide an acceptable return on public investment.

The feasibility study will position the St. Louis County Port Authority to issue a new request for proposals for the redevelopment of the site.

Robust Community Engagement

Community engagement was a very important part of this process. Engagement included:

- An advisory committee that included community members worked with the planning team to dive deep into the market analysis and develop principles of preferred development.
- A series of focused neighborhood conversations in small groups.
- Two public forums.

Development Principles

The planning team worked with the advisory committee and the community in developing a set of "development principles." These principles will help inform future development proposals and development standards to ensure community expectations are met.

What is a Market Analysis and Feasibility Study

A market analysis evaluates what land uses are commercially feasible given the existing market conditions. The market analysis examines many factors, including current land use; recent or planned development; economic growth sectors in St. Louis County and the St. Louis region; demographic and housing data, trends, and projections; and market area supply and demand.

A key challenge with a market analysis is that the economy is never static, especially in 2022. For example, mortgage rates in 2022 have doubled. Inflation has driven up construction costs and other segments of the economy. Many national economists are predicting a possible recession in 2023. Therefore, this report's data, information, and price points reflect the best available data at that particular time to evaluate the land use scenarios.

Outline of this Report

This report includes three parts.

- Part 1: Includes the preferred and alternative land use recommendations, a concise overview of the site, and the development principles.
- Part 2: A chronological process of the land use evaluation and community engagement starting with the six initial land use scenarios and progressing to the final three land use scenarios.
- Part 3: The full market analysis and research data.

Community Engagement

The Market Analysis and Feasibility Study included a robust community engagement process. Highlights of engagement included:

- A 20-person Advisory Committee made up of neighborhood organizations, institutions, residents, and other key stakeholders.
- Twelve (12) small group discussions in late April through early June.
- Two (2) pop-up events at the North County Recreation Center.
- Two (2) public forums with over 200 attendees per forum.
- Three (3) small group listening sessions in early October.
- A dedicated project website with over 4,400 unique visitors.
- Regular e-blasts. Over 500 sign-ups for the e-blast from the project website.

A community driven, market based approach.

WEBSITE OVER 4,400 UNIQUE VISITORS!

Click Here to Sign Up to be Emailed with Project Updates

RECENT SCHEDULE

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

UPCOMING SCHEDULE

- April: Advisory Committee Meeting #2

Goals of the Study

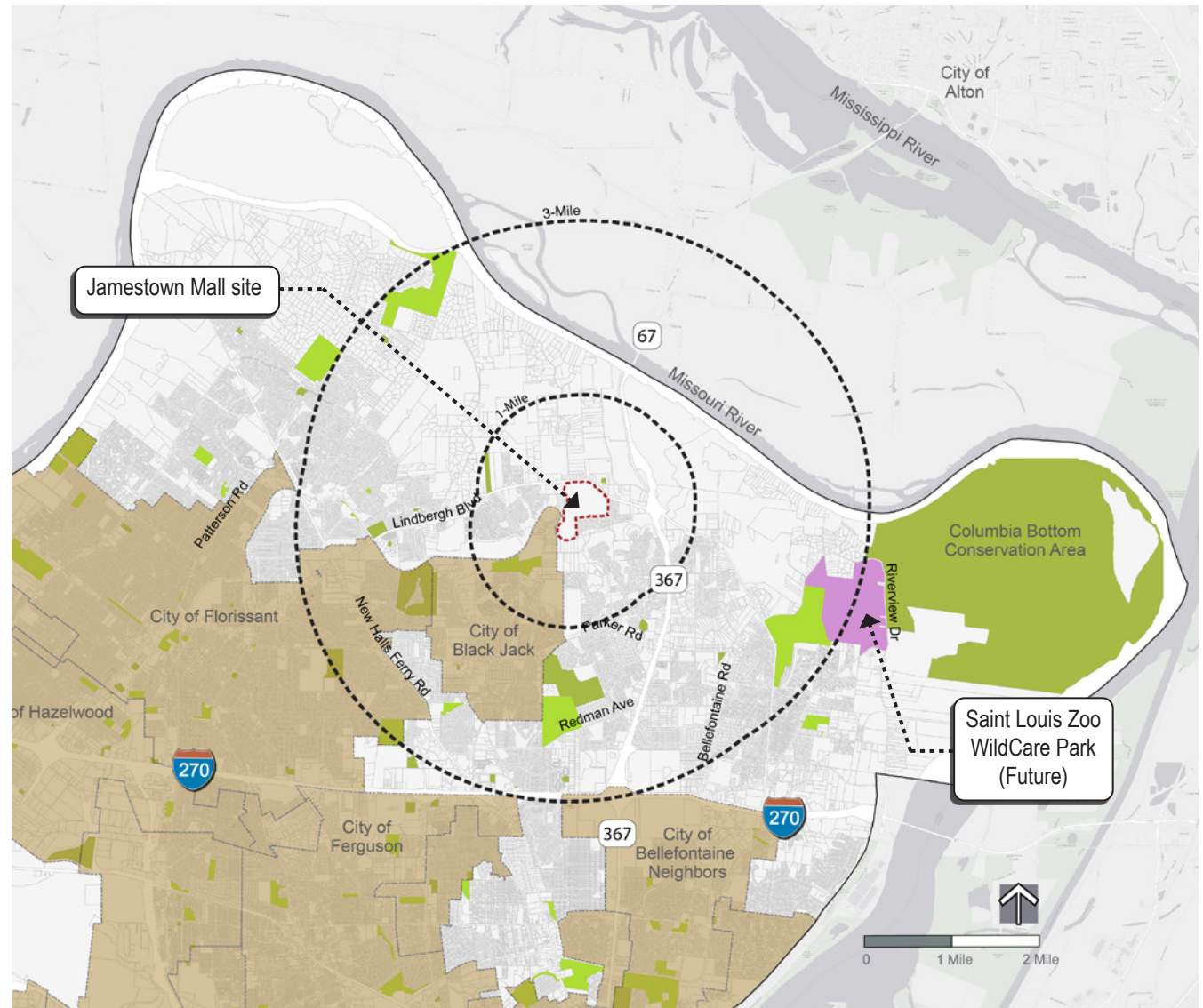


Context

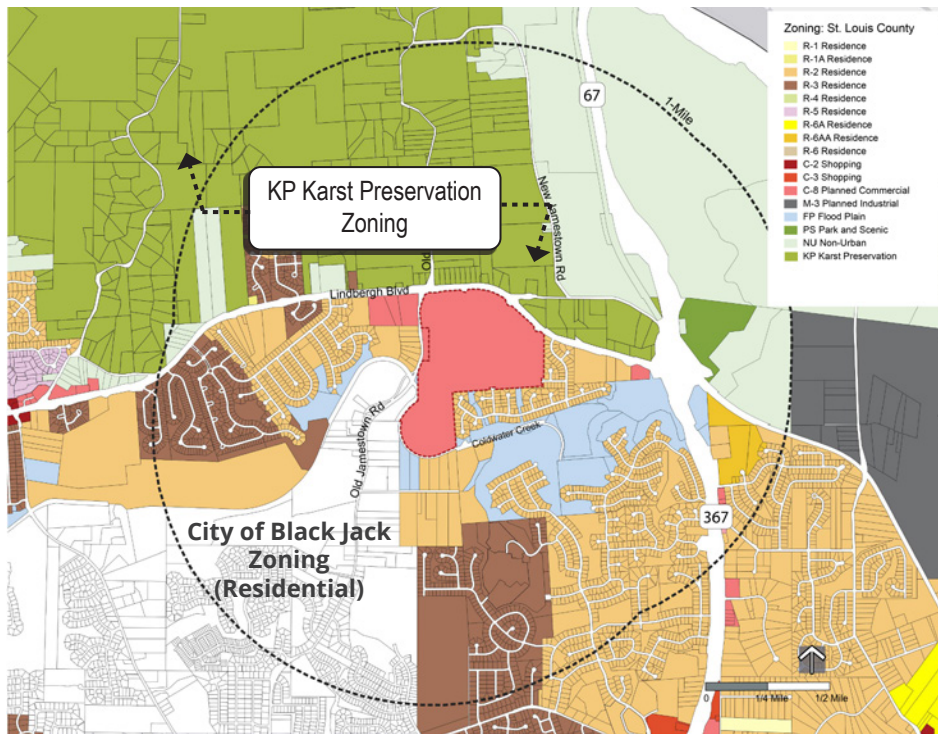
The Jamestown Mall site is located in unincorporated north St. Louis County. The site is adjacent to the City of Black Jack.

The site is near the future Saint Louis Zoo WildCare Park, which is targeted to open in 2027 (see additional information in this section).

Part 3 of this report includes details regarding surrounding land uses. The following pages include important pieces of information regarding zoning and site conditions.



EXISTING ZONING



The existing Jamestown Mall site is zoned C-8 "Planned Commercial."

The south side of Lindbergh Boulevard is primarily residential zoning. On the north side of Lindbergh Boulevard is KP 'Karst Preservation.'

'Karst Preservation' zoning seeks to preserve the karst geology in its natural state while allowing development at an intensity that can be accommodated within the constraints of the geological features of this unique area. Thus, any new development north of Lindbergh will have significant limitations. While the 'Karst Preservation' zoning limits potential expansion opportunities for many development scenarios for the Jamestown Mall site, the existing agriculture land north of Lindbergh is a potential strength for the AgTech Annex scenario, as described later in this report.

Rezoning

The Jamestown Mall site is currently zoned C-8 Planned Commercial District. The C-8 Ordinance governing the Jamestown Mall site only permits a retail shopping mall. In order to change the permitted uses in the C-8 District, or rezone the property to another zoning district, a new Public Hearing before the St. Louis County Planning Commission will be necessary.

According to the St. Louis County Department of Planning, the overall zoning process typically takes 4-6 months, starting with the submission of an application, survey and legal description of the property, and a preliminary site development plan. Once the application is accepted by the Department of Planning, the petition is scheduled for Public Hearing.

The St. Louis Planning Commission does not take action at the Public Hearing. Subsequent to the meeting, the Planning Department staff prepare a detailed information report with a recommendation. The recommendation is presented to the Commission at an Executive Meeting, typically the first Monday of the month following the Public Hearing. The Planning Commission votes to accept, reverse, or modify the staff's recommendation. At a subsequent Executive Session, the Commission votes to forward their Letter of Recommendation to the full County Council. The letter of recommendation includes the report, comments from other reviewing agencies, the preliminary site plan, and detailed conditions of development. All of the Planning Commission Executive Meetings/Sessions are open to the public and included on the County Public Notices webpage. The County Council will usually see the petition on their agenda at four consecutive Tuesday meetings for the following actions:

- Receive and file the Planning Commission's Letter of Recommendation
- Introduce a bill for the rezoning
- Perfect the bill
- Finally pass the legislation

Once the County Executive signs the ordinance, the rezoning is effective. Only then can the petitioner begin the permitting process. The Planning Department is involved in the review and approval of the Site Development Plan, which must adhere to the conditions of development adopted by the Council. The approved Site Development Plan is required in order for the developer to pull permits, which are issued by the County Department of Transportation and Public Works.

Recommended Land Use: Ag-Food Technology Campus

Of the three final scenarios evaluated by not only the consulting team but also by the Advisory Committee and the public at large, the Ag-Food Technology Campus scenario clearly emerged as the preferred direction for the Jamestown Mall site.

Benefits of the Jamestown Ag-Food Technology Campus include:

- Opportunities for expansion space to support the growing regional AgTech/Ag-Food sector. In particular, the site has the potential for lower-cost greenhouses as well as test plots without the need to travel greater distances into the rural areas of the metro area.
- Leveraging existing agriculture land north of Lindbergh Boulevard.
- Opportunity for North St. Louis County to align with the Greater St. Louis Jobs Plan.

Opportunities For Expansion Space To Support The Growing Regional AgTech/Ag-Food Sector

Life, Physical, and Social Science occupations which numbered 7,526 in 2020 and are projected to increase to 8,209 in the St. Louis region by 2030, a growth rate of 9.1 percent. Total jobs in the St. Louis region are projected to increase by 7.3 percent over the decade, indicating that the science occupations will expand more rapidly than the regional average while food and soil scientists will increase more rapidly than general science occupations.

The numbers are not immense, but they are important in a region that has specialized in plant sciences almost from the founding of St. Louis. The evolution of this economic sector most recently manifested its strength with the creation of the Donald Danforth Plant Science Center in 1998. The Danforth Center attracted hundreds of scientists and



related employees to St. Louis and eventually led to the rebranding of a 600-acre area including and adjacent to the Danforth Center called “39 North,” so named because St. Louis straddles the Earth’s 39th parallel which effectively bisects the most productive agricultural lands around the world.

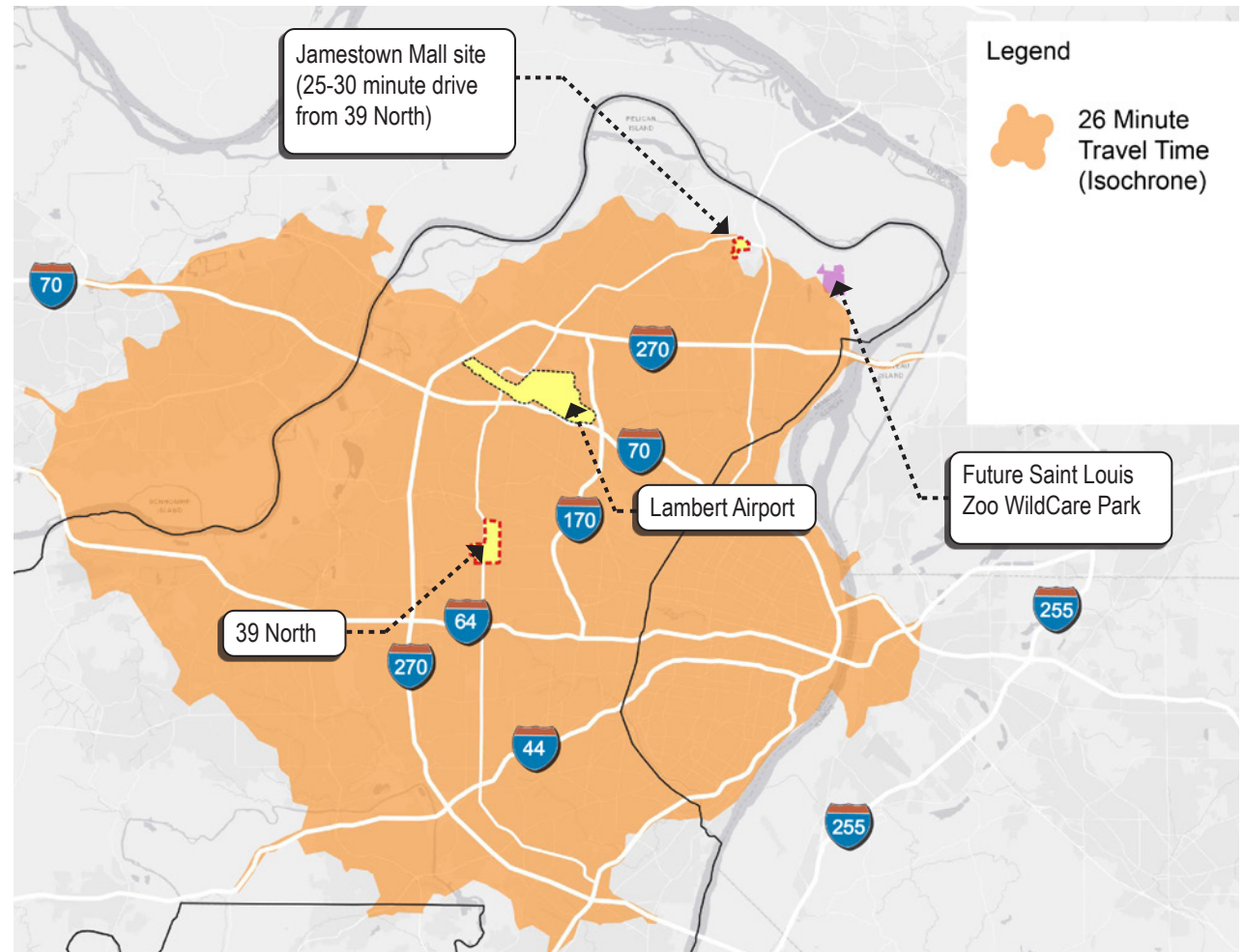
The Jamestown Mall site can address two critical needs for 39 North and the AgTech/Ag-Food sector.

1. Space for Additional Development: The bulk of the 39 North properties are industrial in nature, having been part of a large and very successful industrial park created in the 1960s.¹ There is very little available land for additional development, such as greenhouses, let alone for test plots, though the existing buildings should be suitable for conversion to other agricultural industry purposes, including commercial production as well as research and office space. Moreover, the greenhouses presently in operation at 39 North are said to be equipped with high value technological features which require rents that lower-cost researchers are unwilling or unable to afford.

¹ This would not be said of the specific Danforth Center and nearby buildings which are office and research facilities, designed and built as such.

2. Lower Cost Real Estate: The 39 North properties are relatively expensive in real estate terms. They are located in a highly desirable suburban setting with excellent access and visibility. Many needs of the ag-food tech industry presently point to low-value greenhouses and small test plots, if not also fermentation facilities. Early indications are that such needs cannot be economically met at 39 North, while Jamestown Mall, once the existing buildings are cleared, offers potentially substantial real estate cost savings.²

² Based on analysis of quarterly “market reports” from three commercial real estate firms in metro St. Louis (Newmark Zimmer, Gershman, and Jones Lang LaSalle), office rents in West County (broad location of 39 North) are 32 percent higher than in North County, industrial rents are 46 percent higher, and retail rents are double those in North County.



Historic Growth of the AgTech/Ag-Food Sector

Other indicators of the strength of the agricultural industry and scientific jobs in St. Louis provide larger numbers and impressive growth rates over the long run. The U.S. Bureau of Economic Analysis (BEA) publishes county and metropolitan-level jobs by major economic sector every year in a database initiated in 1969 and presently extending to 2021. Prior to 2001, the data relied on the old Standard Industrial Classification (SIC) system, then switched to the North American Industrial Classification System (NAICS). Many of the economic sectors cannot be compared over that entire timeframe because some were “added”³ when NAICS became the standard.

A good example is what used to be called the *agricultural services, forestry, and fishing* sector within SIC from 1969 to 2000. After 2000, this sector became *forestry, fishing, and related activities*, dropping the agricultural services component which became part of another sector. Still, that pre-2001 sector in metropolitan St. Louis indicates how important the agricultural services industry was in the metro area.

Between 1969 and 2000, metropolitan jobs in agricultural services, forestry, and fishing increased from 2,740 to 11,915, a 287 percent increase in 31 years, or about 11 percent growth per year. In the U.S. as a whole, the average was nine percent per year. Total employment in the metro area over that time increased by an average of just 1.5 percent per year. *Agricultural services, forestry, and fishing* jobs tripled their share of all jobs in the metro area from 0.24 percent in 1969 to 0.73 percent in 2000.

While that sector cannot be traced from 2001 to 2021, a “new” sector was defined in the NAICS that has much relevance for the research and technology focus of Jamestown Mall’s third scenario: *Professional, scientific, and technical services*. The St. Louis metro area had 99,950 jobs in that sector in 2001, increasing to 119,185 by 2021, an average of one percent per year. In comparison, all jobs in the metro area increased by just 0.4 percent per year.

Unfortunately, St. Louis did not keep up with the nation as a whole. *Professional, scientific, and technical services* jobs in the U.S. grew at a rate of 2.2 percent per year (just over double the St. Louis rate) while all jobs increased an average of 1.1 percent per year—also over double St. Louis.

3) Perhaps a better word might be “disaggregated” because the SIC system effectively lumped many sectors together while NAICS pulled them out as significant sectors of their own.

The better news, however, is that *professional, scientific, and technical services* jobs in St. Louis gained a larger share of all metro area jobs over the two decades, from 6.1 percent in 2001 to 6.7 percent in 2021. Such jobs in the entire U.S. increased from 6.2 percent to 7.4 percent of all jobs.

Within St. Louis County alone, *professional, scientific, and technical services jobs* increased from 7.7 percent of all county jobs to 8.0 percent between 2001 and 2021. These jobs in St. Louis County represented 53 percent of all *professional, scientific, and technical services* jobs in the metro area.⁴

4) While there was an increase in numbers of professional, scientific, and technical services jobs in the county, this was actually a decline in the share of metro area jobs in this sector from 60 percent in 2001. Meanwhile, professional, scientific, and technical services jobs in the City of St. Louis increased their share from 16 percent of all metro area jobs in this sector to 20 percent.

Projections of Growth of the AgTech/Ag-Food Sector

The Missouri Economic Research and Information Center (MERIC)⁵ provides estimates and projections of employment in a wide range of economic sectors and occupations for the St. Louis region.⁶ The latest available is for the decade of 2020 to 2030.⁷ Three occupational categories (of 749) best represent the AgTech/Ag-Food sector:⁸

1. Food scientists and technologists who numbered 89 in the St. Louis region in 2020 with projections to 98 by 2030, a 10.1 percent growth rate.
2. Soil and plant scientists who numbered 154 in the St. Louis region in 2020 with projections to 171 by 2030, an 11.0 percent growth rate.
3. Biochemists and biophysicists who numbered 109 in the St. Louis region in 2020 with projections to 113 by 2030, a 3.7 percent increase.

Notwithstanding this projected job growth analysis, an AgTech/Ag-Food development will not likely create a great many jobs on site at the Jamestown Mall site. The industry isn't all that large and it depends more on land and facilities for growing plants than on intense employment. Most jobs would be highly skilled, but likely not in large numbers. In some ways, however, this can contribute to the relative serenity of residential life in North County, particularly around the mall site. There can be important economic development without substantial commuting or other commercial traffic.

5) A component of the Missouri state government's Department of Economic Development.

6) Defined by MERIC for statistical purposes as the City of St. Louis and the counties of St. Louis, St. Charles, Franklin, and Jefferson.

7) Similar projections for the United States as a whole extend to 2031 at present.

8) These do not represent support occupations, such as administrative or management jobs, only those apparently directly involved in agricultural research.

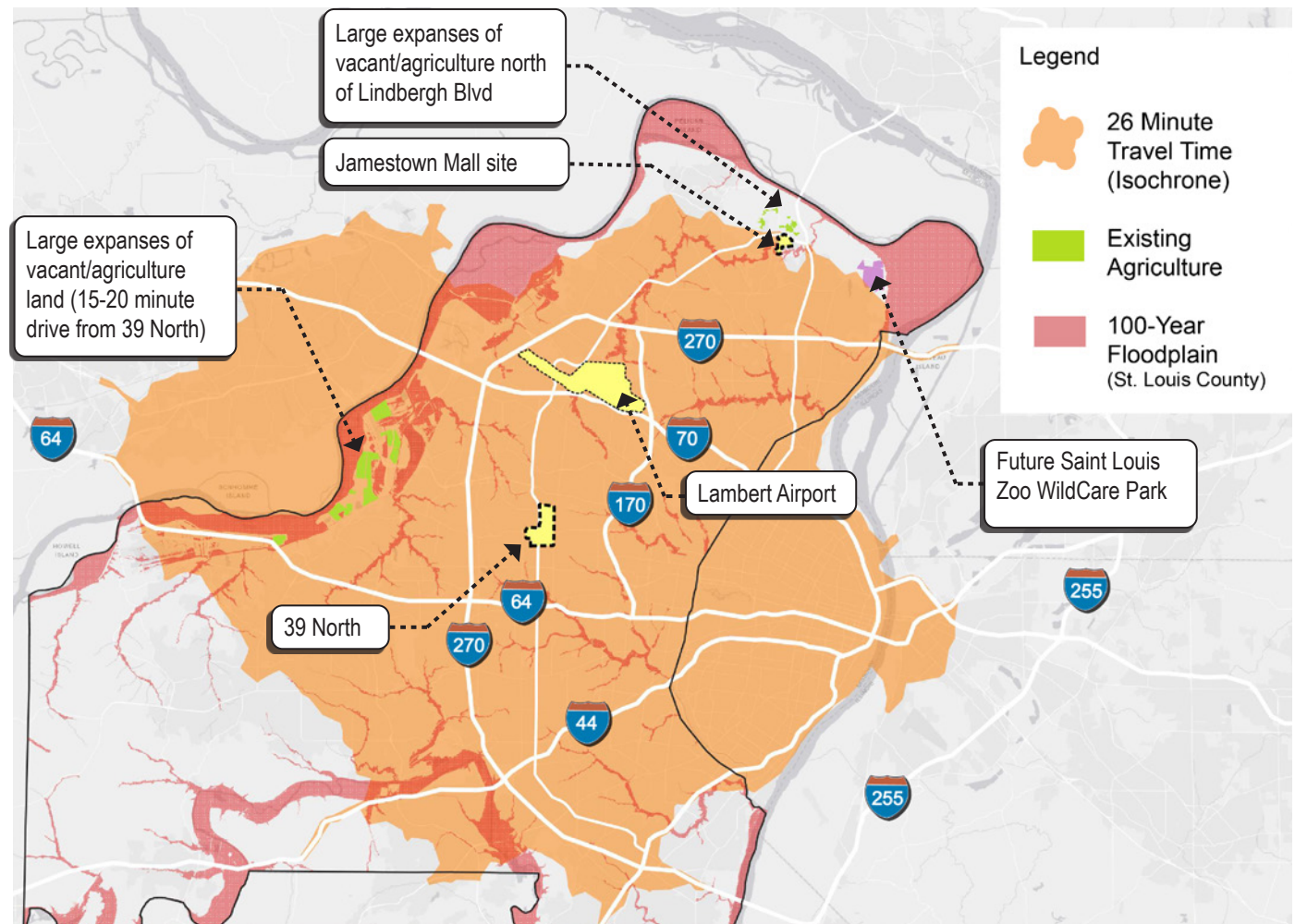
Leveraging Existing Agriculture Land North Of Lindbergh Boulevard

St. Louis County is largely built out, with limited large tracts of vacant (or agriculture) land that could be used for test plots or other complementary uses for the AgTech/Ag-Food sector.

The map on this page shows two areas of vacant/agriculture land not in the 100-year floodplain.

Large expanses of vacant/agriculture land exist in the Chesterfield Bottoms / Howard Bend area (approximately a 15-20 minute drive from 39 North). However, this area has been under increased development pressure in recent years.

North of the Jamestown Mall site, there are over 140 acres of vacant/agriculture land. Much of the land is already farmed. However, 140 acres is likely a conservative estimate. The actual amount of agriculture land is likely over 200 acres. This area is unlikely to receive development pressure because of the Karst Preservation zoning that places restrictions on development.

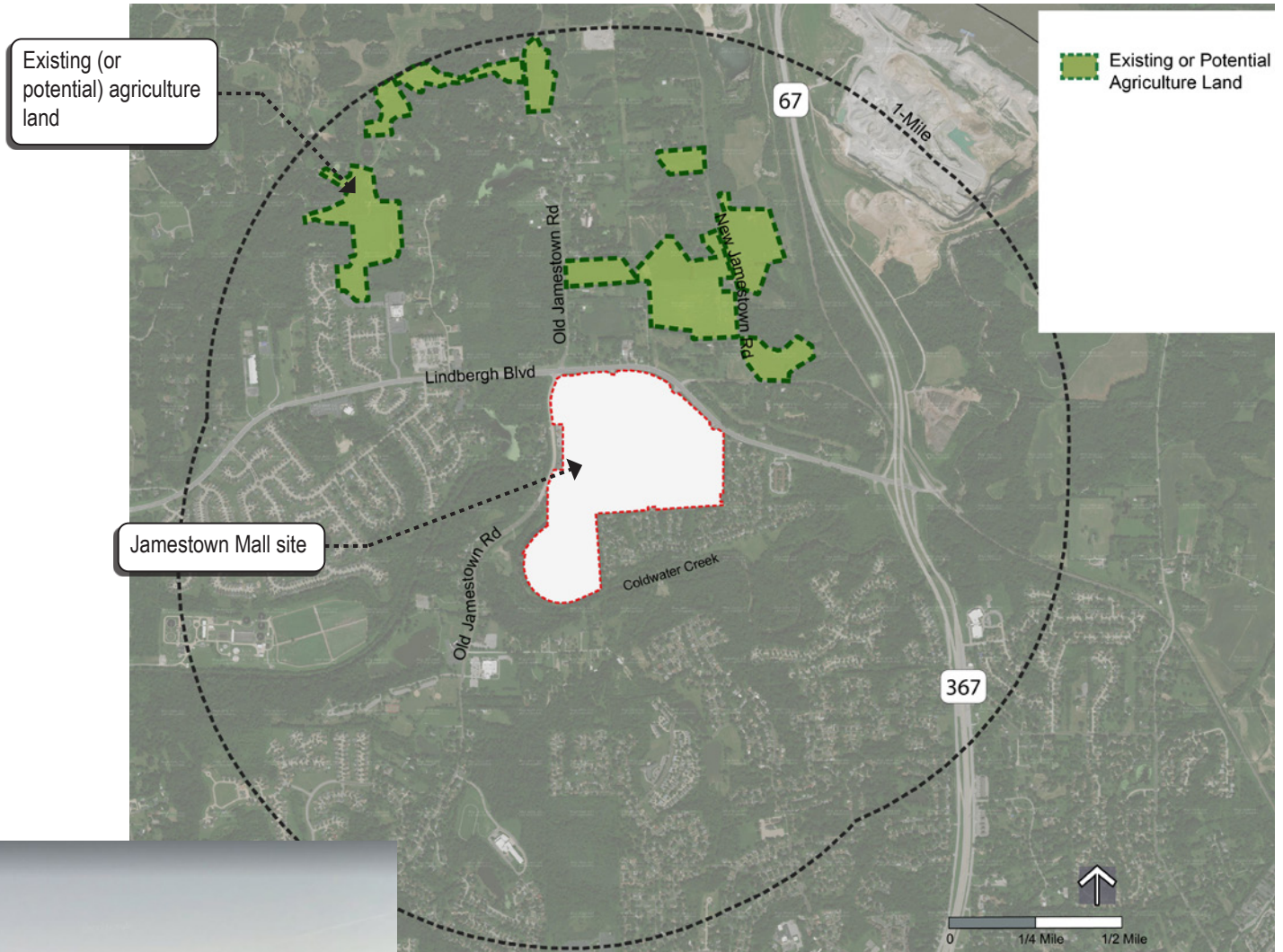


Nearby Existing Agriculture to the Jamestown Mall Site

The map on this page shows existing (or potential) agriculture land within one mile of the Jamestown Mall site.

Much of the land within one mile of the Jamestown Mall site is undeveloped (37% of the land use is classified as vacant/agriculture). However, not all this land is suitable for agriculture. Some of the land is wooded, has steep topography, or has other limitations.

The land highlighted on the map (existing agriculture or potential) totals approximately 140 acres. Much of the land is already farmed. However, 140 acres is likely a conservative estimate. The actual amount of agriculture land is likely over 200 acres.



Left: Existing agriculture land along New Jamestown Road near the Jamestown Mall site.

Opportunity for North St. Louis County to align with the Greater St. Louis 2030 Jobs Plan

Released in 2021, the 'STL 2030 Jobs Plan' provides a 10-year roadmap for boosting economic growth, increasing the number of quality, living-wage jobs, and reducing racial disparities in employment and wealth-generation to boost opportunities for all. The plan is the first metro-wide jobs plan in a decade for St. Louis' 15-county region.

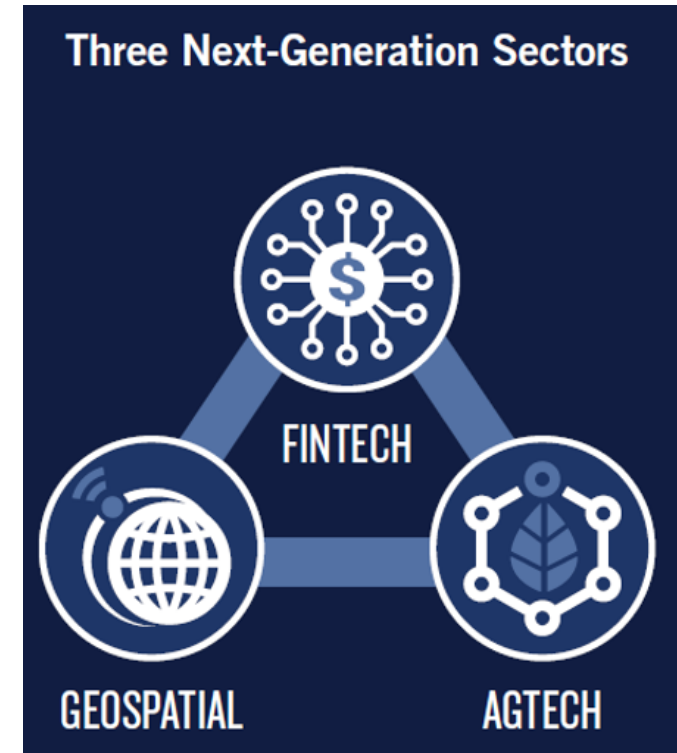
The Ag-Food Technology Campus can align with the 'STL 2020 Jobs Plan' in two key ways:

- AgTech is a Next-Generation Sector
- Advancing Racial Equity

AgTech is a Next-Generation Sector

AgTech is identified in the Jobs Plan as a Next-Generation Sector, along with FinTech (Financial) and Geospatial, to make St. Louis Metro a hub for next-generation industries and technologies.

Positioning the Jamestown Mall site to be part of the St. Louis region's AgTech ecosystem goes beyond just individual jobs on the site. Along with other upcoming North St. Louis County investments like the Saint Louis Zoo WildCare Park, the Jamestown Ag-Food Technology Campus will elevate the perception and brand of North County.

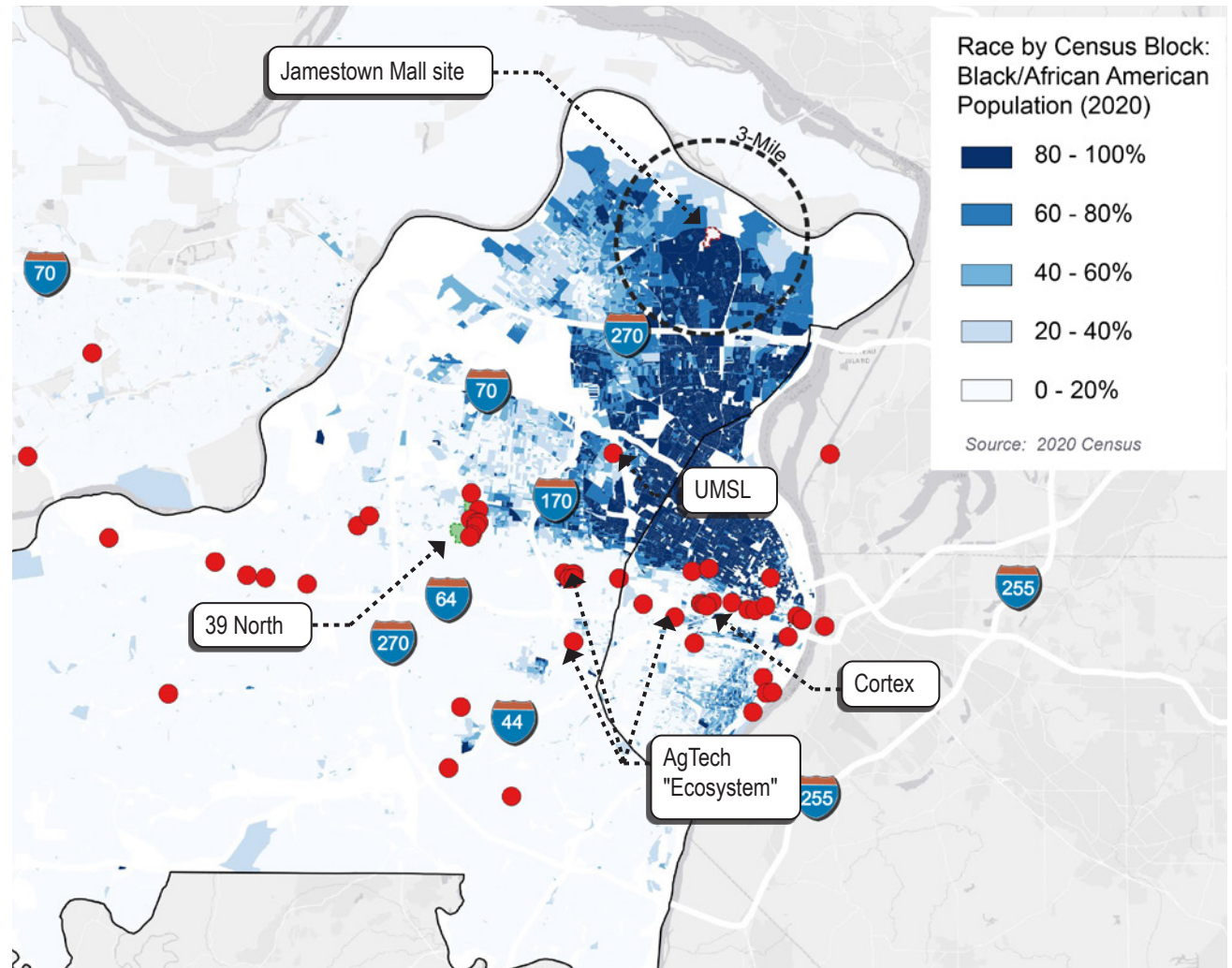


Advancing Racial Equity

Advancing racial equity and social justice is a key element of the Jobs Plan. While the Jobs Plan focuses on the City of St. Louis, the Ag-Food Technology Campus will help extend the goals of the Jobs Plan to an area of the St. Louis region that has seen increased diversity over the last two decades.

The map on this page highlights the existing AgTech "ecosystem" (businesses and organizations in AgTech/Ag-Food) overlaid on a race map of St. Louis County. As the map shows, much of the AgTech "ecosystem" is currently along the Interstate 64 corridor.

An Ag-Food Technology Campus at the Jamestown Mall site will extend equitable investment in a highly diverse area of St. Louis County.





PREFERRED LAND USE AG-FOOD TECHNOLOGY CAMPUS



WHAT'S INVOLVED

- Emphasis on expansion space for agriculture technologies and production facilities for growing firms from St. Louis regional AgTech centers.
- In addition to agriculture focus, remain open to research and technology opportunities outside of agriculture that can expand regional opportunities.
- Opportunity for high productivity agriculture facilities utilizing advanced technology in food growth relatively close to population centers.
- Renewable energy (solar) to provide electricity (or partially offset).

BENEFITS

- AgTech is a major St. Louis regional economic sector.
- Strong indications of a regional need for additional space for the AgTech sector.
- New science emerging from established companies.
- Spaces/facilities need varies, but could include:
 - Greenhouses
 - Test plots
 - Precision Fermentation
 - Lower-cost facility spaces
- Central location in U.S. agricultural belt.
- While onsite jobs may be limited, the site could play an important role in the regional economy.
 - Close to skilled labor force
 - Close to research centers
 - Close to international airport
 - Less expensive land
- Agriculture land north of Lindbergh Blvd could support and benefit from this scenario.
 - Land is out of flood plain
 - Otherwise limited development potential

KEY STATS

- Hi-Tech Large Scale Green House
- Precision Fermentation Facility
- Greenhouses
- Lower-cost Facilities
- Field Test Plots
- Solar Energy
- Annex Front Door with Office/ Job Training, Neighborhood grocery/retail, Community open space



PREFERRED LAND USE AG-FOOD TECHNOLOGY CAMPUS



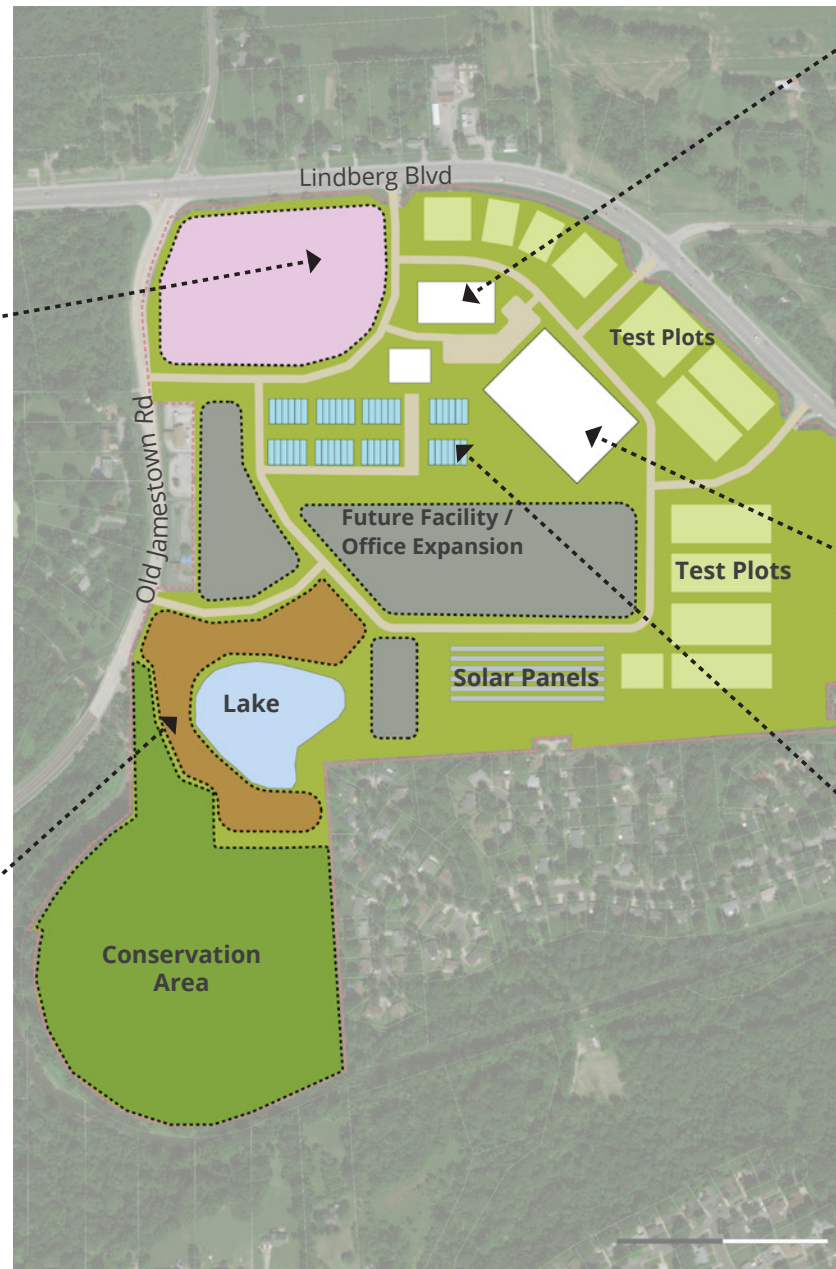
CONCEPT DIAGRAM

The concept diagram is not a "master plan". It is meant to convey the scale of land uses and potential development principles of the scenario. This is just one example of the potential location of uses on the site.

Annex "Front Door"



Conference / Special Events Center



Precision Fermentation Facility



Test Plots



Hi-Tech Large Scale Greenhouse

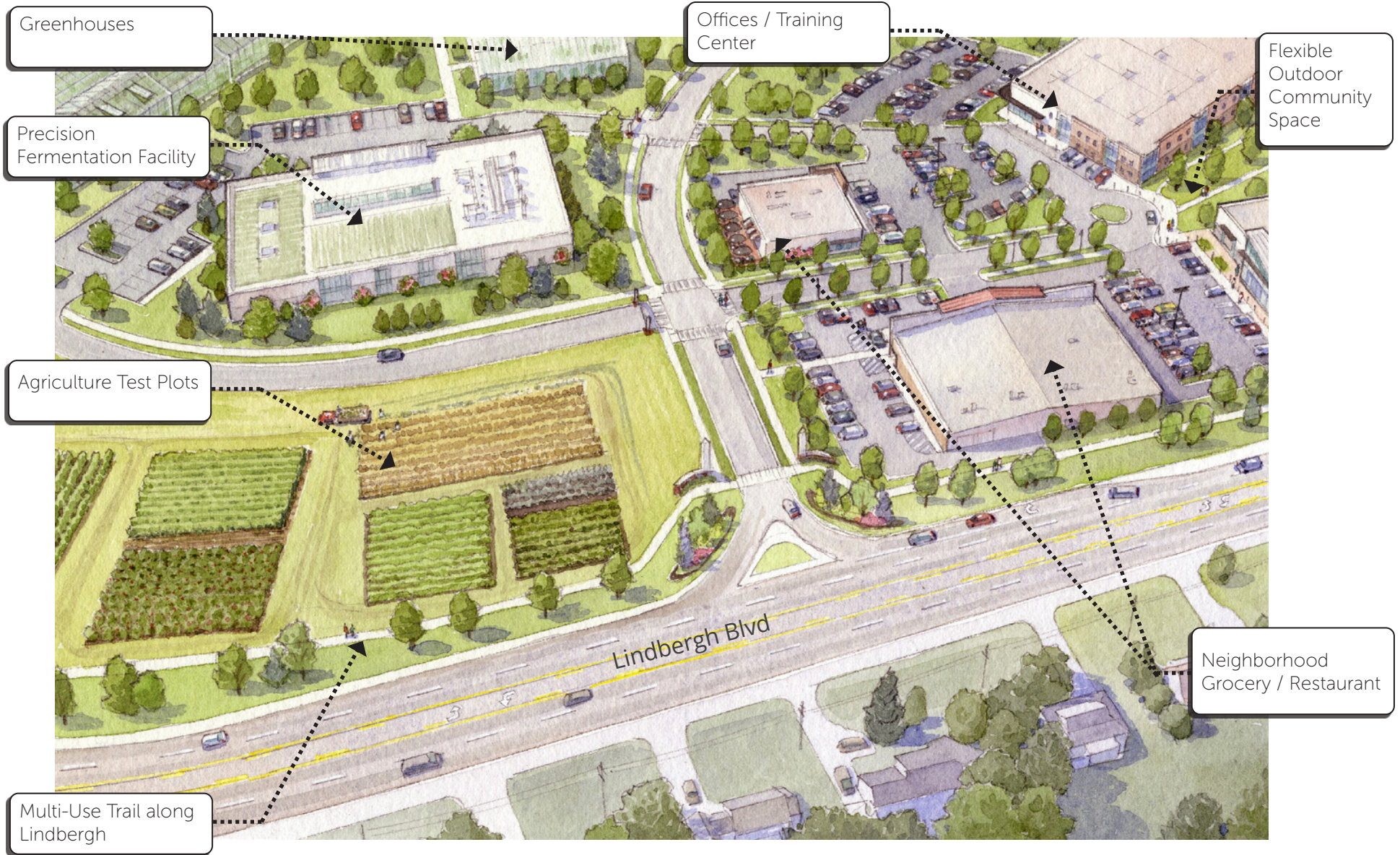


Greenhouses / Growing Hoops





PREFERRED LAND USE AG-FOOD TECHNOLOGY CAMPUS



Note: The above sketch is only a "concept" meant to convey an example of development to help visualize the land uses and potential development principles as part of the scenario.

Branding

"Ag-Food Technology Campus" is just a working title for now. Much the same way that "Agriculture and Energy Technologies Annex" or "AgTech Annex" was a working title during the evaluation of the land use scenarios.

However, branding of the Ag-Food Technology Campus will be necessary as the site development moves forward. Alignment with the regional AgTech/Ag-Food ecosystem will elevate the site and north St. Louis County. Therefore, branding is an essential component.



*Above are just working
examples of potential branding*

Ag-Food Technology Campus: Implementation

After this Market Analysis and Feasibility Study, the St. Louis County Port Authority intended to issue a request for proposals (RFP) for the site based on the recommendations of this report. The Ag-Food Technology Campus, however, does not lend itself to a traditional developer RFP process. Instead, examples of innovation/technology hubs tend to be a mix of public and private partnerships with a combination of for-sale and for-lease real estate.

The success of this Market Analysis and Feasibility Study has positioned the site to be part of an essential regional economic sector. For the first time in over a decade, there is strong community support for the direction and future of the Jamestown Mall site. The Ag-Food Technology Campus is a forward-thinking economic development opportunity for north St. Louis County that would further elevate the area along with other recent investments, such as the Saint Louis Zoo's WildCare Park.

AgTech is a "Next-Generation" economic sector for the St. Louis region. In many ways, this is a positive for the Jamestown Mall site. There is an opportunity to be part of the growing momentum and demand for AgTech/Ag-Food investments in the St. Louis region. However, the downside of being a "Next-Generation" sector is that the market demand is not fully realized, at least as part of a linear site development process. There are also limitations to traditional market data to support "Next-Generation" sectors. (Case in point are the recent specialized studies examining the demand for innovation "step-up" space and the demand for a regional specialized fermentation facility.) Much of the market demand is presently based on limited, but illuminating, data and much anecdotal information gleaned from area professionals and economic development advocates.

"For the first time in over a decade, there is strong community support for the direction and future of the Jamestown Mall site."

While the St. Louis County Port Authority could immediately issue an RFP based on the preferred land use scenario (Ag-Food Technology Campus), there are sufficient uncertainties with the AgTech/Ag-Food scenario that it is unlikely that a current RFP will result in an acceptable proposal for the entire site.

Thus, this report recommends the following procedure to initiate the implementation of the Ag-Food Technology Campus scenario.

Complete the Demolition

Complete the demolition of the existing mall and prepare the entire site as an obvious development opportunity. A greenfield site will show progress to the community and greatly increase the marketability of the site moving forward.

Initiate an "Exploration Window"

Initiate a 24-to-30 month "exploration window" to more fully determine reasonable parameters and financial expectations of the scenario:

- Sponsor or co-lead a "Regional AgTech working group" consisting of economic development organizations serving all or parts of the metropolitan area, workforce and educational organizations training people in ag/tech skills and management, and selected businesses and entrepreneurs in the industry. (The November meeting of such organizations at the St. Louis Economic Development Partnership was a start.) Given the potential national and international impact of this scenario, Greater St. Louis, Inc. and/or the Missouri Partnership could be co-leaders of the working group.
- Create a data-driven and consensus-driven master plan for the site, once again including community input. Residents of north St. Louis County have broadly agreed that this is the preferred scenario, but they did so without a more specific master plan. Only about 100-110 acres of the site's 142 acres are realistically available for new development in light of the conservation area defined by Cold Water Creek. Still, the AgTech/Ag-Food scenario may not require all 100-110 acres, so other compatible uses should be considered (e.g., senior housing, village-scale retail center).

- Include prospective real estate developers as independent experts to inform the planning process. This will ensure that market potential and financial considerations are realistic. Do not include developers, however, on oversight or planning committees. Keep them at arms-length to preserve their objectivity for eventual RFP responses.

Additional Site Testing

Conduct testing for radioactive contamination. Areas of development on the Jamestown Mall site are well away from Coldwater Creek's floodplain. However, recent conflicting findings at Jana Elementary School of radioactive contamination have created uncertainty about any property adjacent to or near Coldwater Creek. Researchers with the firm Boston Chemical Data Corporation found "entirely unacceptable" contamination levels at Jana Elementary school in samples collected in August 2022. However, the U.S. Army Corps of Engineers St. Louis District issued a preliminary finding in November 2022 that showed no presence of radioactive material above the expected range of background levels (the level of radioactivity Mother Nature already provides) at Jana Elementary school. The Jamestown Mall site should be tested to ease any uncertainty or perceptions of the site.

Issue a Developer Request for Proposals (RFP)

Issue a developer Request for Proposals (RFP) based on the master plan. With sufficient input from experienced developers during the planning process, the RFP should be explicit enough to encourage competitive responses.

Retain Site Control

Retain Port Authority control of the site through the exploration window period.

- Assure residents in north St. Louis County that there is and will be consistent oversight of the property by an entity with strong links to St. Louis County government and the range of economic and workforce development entities that should and will be involved.
- Assure that the actions and planning during the exploration window remain consistent with the economic development goals of the Partnership and citizens of North County and with the findings of the current study.

Ensure Socio-Economic Benefits

Analyze a variety of techniques to provide public-sector support to assure developer success that also contributes to the socio-economic benefits of the region, the county, and especially North County. Techniques might include, though not necessarily be limited to:

- Provide the site free of charge to the winning development team to reduce its upfront costs. (This will necessarily eliminate direct cost-recovery for the Port Authority based on expenditures related to the site.)
- Evaluate financial incentives that could be applied to the development of the site and/or to occupant businesses on the site that improve private sector rates of return. Such incentives could include, but not be limited to:
 - ◊ Property tax abatement
 - ◊ Tax increment financing
 - ◊ Sales tax reductions for construction materials
 - ◊ Income tax credits
 - ◊ Workforce training programs or credits
 - ◊ Retention of employee state withholding taxes

Continue to Generate Local Interest in the Scenario and the Site

- Support schools to teach ag-tech and food growing programs.
- Support collegiate research that reinforces the advanced technology in growing food.
- Sponsor community gardens and related programs that demonstrate the importance and skills in agricultural research as well as techniques for preparing food for human consumption.

Promotion and Marketing

Take the current study “on the road” to widely promote that transformation of Jamestown Mall is actively underway, but that input is still being sought for a promising economic development scenario. Sustain top-of-mind interest in the site.

- Maintain an active website, updating with newsworthy accomplishments, meetings, and presentations.
- Make presentations to and participate in meetings with a wide range of professional, community, workforce, educational, and political organizations (among others), including formal presentations to the St. Louis County Council and, possibly, to relevant committees of the Missouri General Assembly. Keep everyone fully, but gently, informed. Continue to reinforce the groundwork for possible future legislative, financial, and community support.
- Create an email list of interested parties for routine (monthly, quarterly) direct communication about progress with the site, its planning, and its accomplishments. This list should include the news media.
- Meet with news media representatives to generate stories about the site, its potential, and its partners. Work with the Saint Louis Zoo’s WildCare Park, surrounding cities, chambers of commerce, and other North County institutions and businesses to prepare joint stories to submit for news media publication.

Alternative Land Use:

Senior (55+) Residential with Agri-Living

Given some important circumstances of the housing market in North St. Louis County, such as housing ages, sizes, and relative values, an “easy” solution to the redevelopment of Jamestown Mall could be the creation of newer housing to potentially increase the number of higher quality options for North County residents. New housing might also be a catalyst to attract additional population to North County, which has experienced slight population declines in the last decade.

Public comments during the study period mitigate against a recommendation for “general” housing, however. There is concern that existing housing could be abandoned in favor of new housing in light of no net population growth on the horizon. This could result in more vacancies in older subdivisions leading to conditions of blight. Also, there is concern about owner-occupied housing converting to rental housing over time. (However, as shown in the market research in Part 3, newer housing with higher price points in north St. Louis County has kept very high owner-occupancy rates.)

There is an additional market challenge regarding “general” housing. Increased construction costs have pushed the price point of new single-family housing to the margins of what the north St. Louis County market will support.

Even with the concerns listed above, the residential scenarios received a substantial amount of favorability from the community. Thus, this report recommends a senior (55+) residential development with agri-living as an alternative land use if the AgTech/Ag-Food Technology Campus is not implemented.

Benefits of the Senior (55+) Agri-Living Residential include:

- Community perspective: More open to senior focused residential.
- Better alignment with market demand with a focus on growing senior population.
- Opportunities for retail/commercial amenities.
- Agri-Living can be a market differentiator.



Community Perspective: More Open To Senior Focused Residential

There is a willingness expressed by the public to support more housing for senior citizens, if only to provide opportunities for elderly residents to remain in North County as their housing needs and physical/ mental capabilities change. Higher density housing for aging citizens is acceptable among the public. New and lower maintenance homes of greater density (units per acre) than prevalent elsewhere in North County could support “aging in place” without violating the general public’s concerns about additional housing. Existing homes occupied by senior citizens can be marketed toward younger families without the need for more single-family homes.

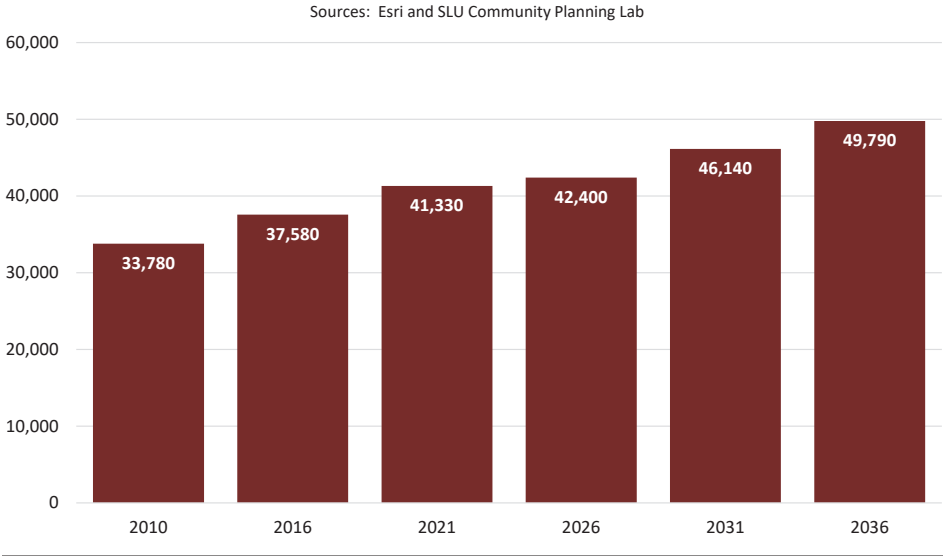
Alignment With Growing Senior Population

The senior population is on the rise in North County, though this growth will be concentrated in “older” seniors for the next 15 years or so. These people are part of the post-World War II Baby Boom generation. The Boomers were followed by a smaller cohort.

While the population in general is not increasing in St. Louis County or North County, the population of older adults is increasing. Using a cohort-survival methodology, the number of north St. Louis County residents over the age of 55 is projected to increase from about 41,330 in 2021 to 49,790 in 2031, a jump of more than 20 percent.

This growth will be uneven by age cohort, however. As the baby boomer generation ages, so will the number of people over the age of 70. But smaller cohorts behind the baby boomers will result in declining numbers of people in North County between 55 and 70. Thus, the greatest housing need (opportunity?) is centered on the very old, who are also least likely to be able to maintain their current homes.

TOTAL SENIOR POPULATION: 2010 TO 2036 NORTH ST. LOUIS COUNTY



Above: The total senior population is projected to reach nearly 50,000 in North County by 2036, from just over 40,000 in 2021. This would be a 20.5% increase in 15 years. While equivalent projections for the entire North County population are not available, U.S. Census projections indicate that America’s total population will increase at only about half that rate.

Opportunities For Retail/Commercial Amenities

This scenario would also include a “village-scale” commercial center (best located on Lindbergh Boulevard as a re-branded entryway to the site) that is walkable from the senior housing with charming boutique shops and dining places. Walkability is important to minimize the number of on-site vehicle trips while encouraging healthy exercise among the senior residents. The commercial center would also welcome shoppers and diners from throughout North County and the region. Their vehicles, however, would not need to enter the senior housing neighborhoods.

That said, the prospective market for additional retail and dining options in North County is questionable. To date, retail and dining sales in the four zip codes that comprise almost all of North County north of I-270 are about 70 percent higher than the buying power of those zip codes would otherwise indicate. That is, North County retailing (mostly concentrated along Lindbergh Boulevard in Florissant and Hazelwood) is a major net attractor of consumers from other parts of the region—most probably from south of I-270. Attracting more shopping and dining establishments would be difficult in an already over-built environment.

Agri-Living Can be a Market Differentiator

The scenario envisions a combination of senior living with “agri-living” that could be a market differentiator for the residential community. Agri-living residential communities are focused around working farms and/or community gardens. Residents find agri-living communities attractive because of their rural character, farm-to-table aspects, available open space, and amenities.

The twenty-plus acres of outlots at the Jamestown Mall site could serve as the primary area for the working farm. In addition, a potential customer for the working farm could be the nearby Saint Louis Zoo's WildCare Park, which could lend the agri-living development additional branding and cachet.

This alternative scenario goes further with outdoor recreation and exercise. A trail system through the Jamestown Mall site would inspire longer walks, particularly if the trail is lined with natural plantings and interesting architecture of on-site buildings.



Senior (55+) Agri-Living Precedent: Chickahominy Falls

Chickahominy Falls near Richmond, Virginia, is an example of a senior (55+) agri-living residential development. The overall development is approximately 180 acres with a 10-acre working farm. Key amenities include:

- Event space (The Barn) with demonstration kitchen
- Community clubhouse
- Walking trails
- Fishing pond
- Conservation areas

The working farm is privately owned and operated, separate from the community homeowner association (HOA). Residential housing includes a mix of single-family homes, villas, and townhomes. A low (or no) maintenance lifestyle is a key selling point along with nature, health, and wellness as part of the agri-community concept.

Right: Master Plan of Chickahominy Falls



Incentives

An important challenge, of course, is the well-known “gap” between today’s costs to construct and provide senior housing and the ability of the market to afford the necessary prices and rents. Construction costs for good quality housing almost certainly exceed the ability to pay in lower-middle income areas like North County.¹ This lower-middle income dilemma has fueled the extraordinary amount of “institutional buying” of single-family homes in North County in recent years by large real estate firms. These homes are typically upgraded lightly, then rented to households who would like to purchase but whose resources cannot generate sufficient down payments that qualify for mortgage loans. Renting becomes a good alternative for families wanting the benefits of single-family housing, but an increase in renters also means fewer on-site investors (i.e., homeowners) in the neighborhoods.² These income challenges could well extend to senior housing on the Jamestown Mall site.

Thus, some kind of development subsidy or incentive is likely to be required to support the senior housing alternative. Incentives could take the form of a land donation where parts of the Jamestown Mall site, after clearance, are effectively given to senior housing developers, thus reducing their overall costs and reducing the need for higher prices and rents. Maximum reutilization of existing infrastructure on site (on the surface and underground) could also reduce development costs. There are also housing support payment programs for qualifying households than can be directed to the seniors themselves in addition to incentives to the developer(s).

1) This is a challenge in countless communities throughout the United States and even in the St. Louis metropolitan area. North County is not unique in this regard.

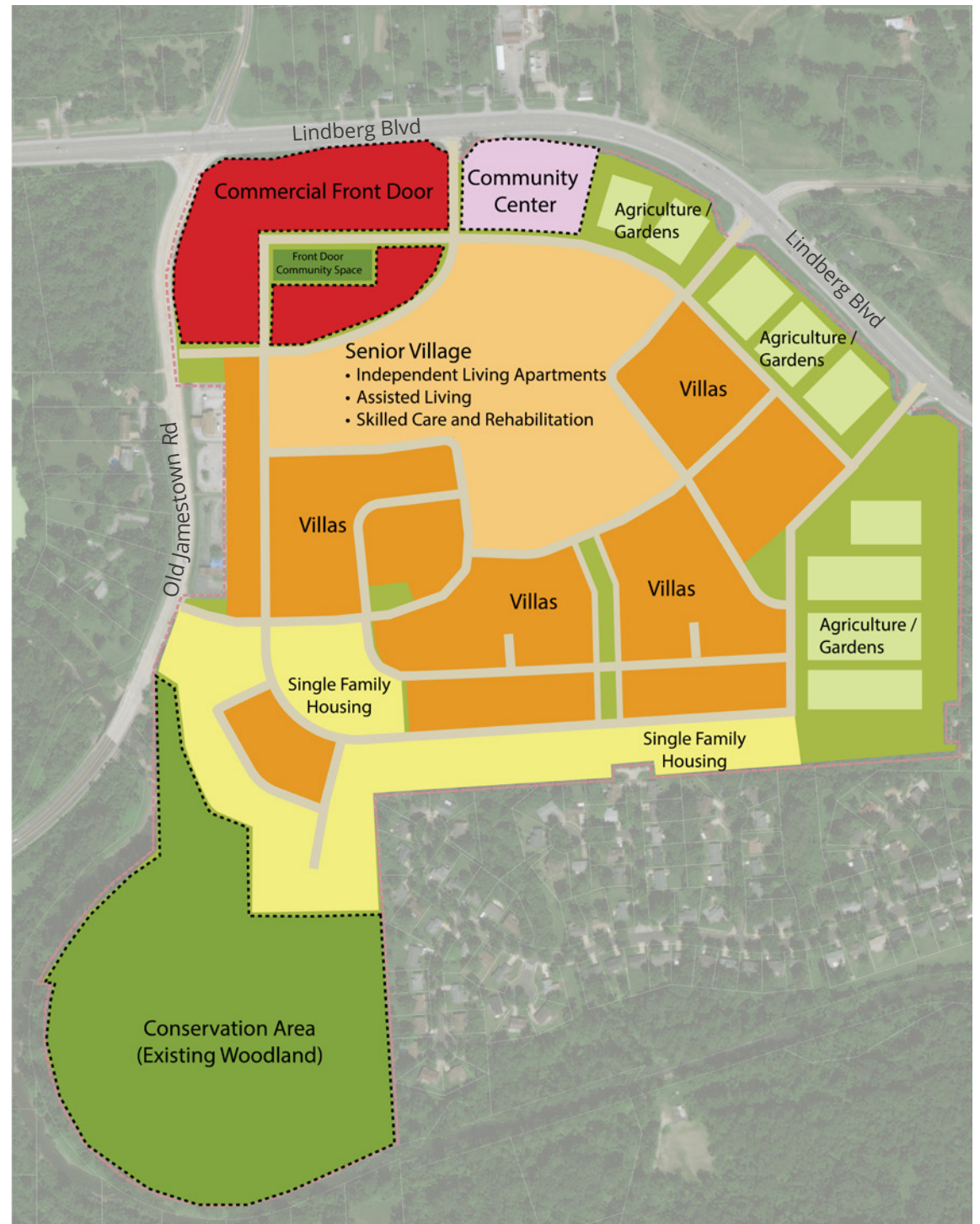
2) North St. Louis County appears to be the most intensive concentration of this “institutional” invasion in the metro area, but it is a phenomenon taking place in virtually every metro area of the U.S.

Of course, the donation of land by the current owner of the Jamestown Mall site would mean no direct recovery of costs that have been and yet-to-be committed to the site. This is an outcome that the St. Louis County Port Authority and the St. Louis Economic Development Partnership must address in the context of larger forces and needs. Returning the site to the property tax rolls is an indirect cost recovery for county government and overlapping taxing districts. Eliminating future costs is another “saving.” There may also be indirect benefits to St. Louis County government from added retail sales taxes, utilities franchise taxes, business licenses, etc.

Senior (55+) Residential with Agri-Living

CONCEPT DIAGRAM

The concept diagram is not a "master plan". It is meant to convey the scale of land uses and potential development principles of the scenario. This is just one example of the potential location of uses on the site.



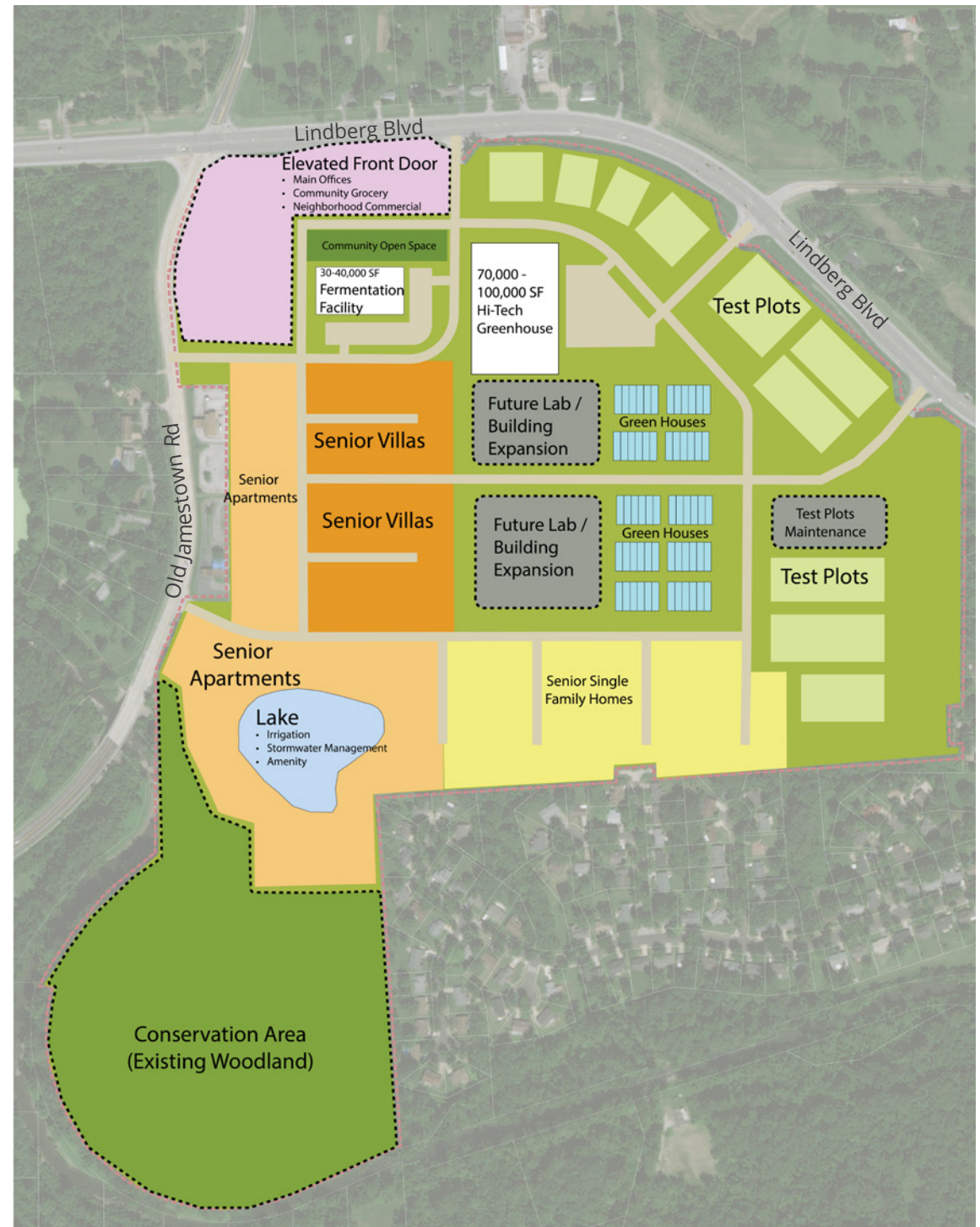
Senior (55+) Residential with AgTech/Ag-Food Technology Campus

CONCEPT DIAGRAM

The concept diagram is not a "master plan". It is meant to convey the scale of land uses and potential development principles of the scenario. This is just one example of the potential location of uses on the site.

This concept diagram explores combining the preferred land use (AgTech/Ag-Food Technology Campus) with senior housing. A benefit of this approach is the potential for faster build-out of the site.

However, the drawback of utilizing a substantial area of the AgTech/Ag-Food Technology Campus for senior housing is that it limits the available acreage for the expansion of AgTech/Ag-Food facilities.



What We Heard

Below is a summary of key themes heard from the community during the small group meetings, public forums, and comment forms.

Opinions Vary Based on Distance from the Site

The distance someone lived from the site impacted their opinions on scenarios. The farther away someone lived, typically, they were more open to the various scenario options. However, the closer they were to the site, the more concerns there were, especially regarding the logistics centers (as part of the first six land use scenarios).

For the final three scenarios, residents who lived closer to the site greatly preferred the AgTech Annex scenario compared to all respondents.

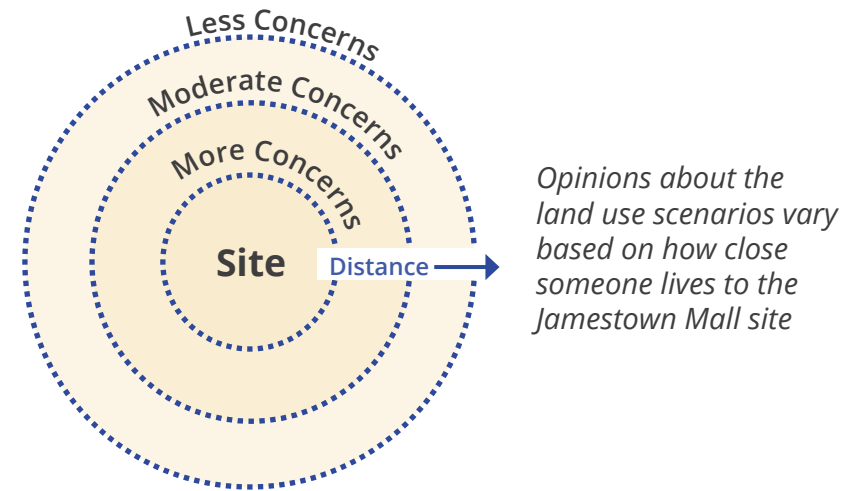
Openness to Learning More

Especially during the initial evaluation of the first six land use scenarios, there was great openness to learning more about the scenarios. This openness reflected the significant percentage of survey respondents who picked “neutral” when asked, “how do you view each scenario in terms of favorability.” The planning team also heard this in small group discussions. Attendees asked great questions to learn more about the different scenarios.

However, the openness was not universal. Some residents had strong opinions about specific scenarios (or aspects of certain scenarios), but overall most residents were open to learning more about the strengths and weaknesses of the scenarios.

Excitement to See Progress

Residents felt some planning fatigue when the planning process started in early Spring 2022. There was also frustration about the lack of progress on the site. However, when news broke later in the Spring about funding for demolition and the sight of workers doing remediation work at the Mall, there was visible excitement among residents that progress was finally happening.



The Tension of “Clean Slate” vs. “Swift Redevelopment”

There were mixed opinions in the community about having a clean greenfield (post-demolition) and swift redevelopment of the site. Much of the surrounding area, especially north of Lindbergh, is almost rural in character, with a scattering of agricultural fields, open space, and low-density residential. Therefore, many residents would be content to have a greenfield (or other passive use) of the site. However, many residents also expressed the desire to quickly have meaningful development and reuse of the site.

“Wants” versus Market Demand

A key finding of the market analysis showed that retail viability for the site was very low due to several factors. The market analysis showed that existing retail competition in North County (primarily the Lindbergh corridor in Florissant), lack of population density near the site, and overall trends in retail meant that new retail on the site was not commercially viable. While most residents understood the retail challenges for the site, many residents still had a wish list of desired retail, including Trader Joe’s, Whole Foods, and Costco (among others).

Many community comments asked for a “Streets of St. Charles” type of development. Unfortunately, the market demand for the scale of commercial development similar to the “Streets of St. Charles” isn’t realistic for the Jamestown Mall site. However, many qualities of a “Streets of St. Charles” (walkability, programming, and quality architecture) could be part of future development at the Jamestown Mall site.

Desire for Community

A consistent theme throughout the small group discussions, public forums, and comments was the desire for community. Ideas from residents on how community could be achieved significantly varied, ranging from physical elements (community center, community open space, etc.) to programming (events, opportunities for families, etc.)

“Elevate” North County

The term “elevate North County” heard in the small group discussions and comments captured a broader sentiment among many residents. Residents would like to see north St. Louis County have the same amenities and resources as other parts of St. Louis County and the region. The future Saint Louis Zoo WildCare Park is an excellent example of “elevating” North County. WildCare Park will be a huge investment and a significant tourist attraction.

While the Jamestown Mall site is a different context, residents want a land use that further elevates the perception of North County.

Concern About Future Vacancy

The vacant Mall has been a community eyesore for many years. Residents were very concerned about future developments (buildings) becoming vacant in ten to fifteen years. Many residents prefer a more conservative development approach, such as keeping a greenfield in the short-term, to ensure long-term, viable development.

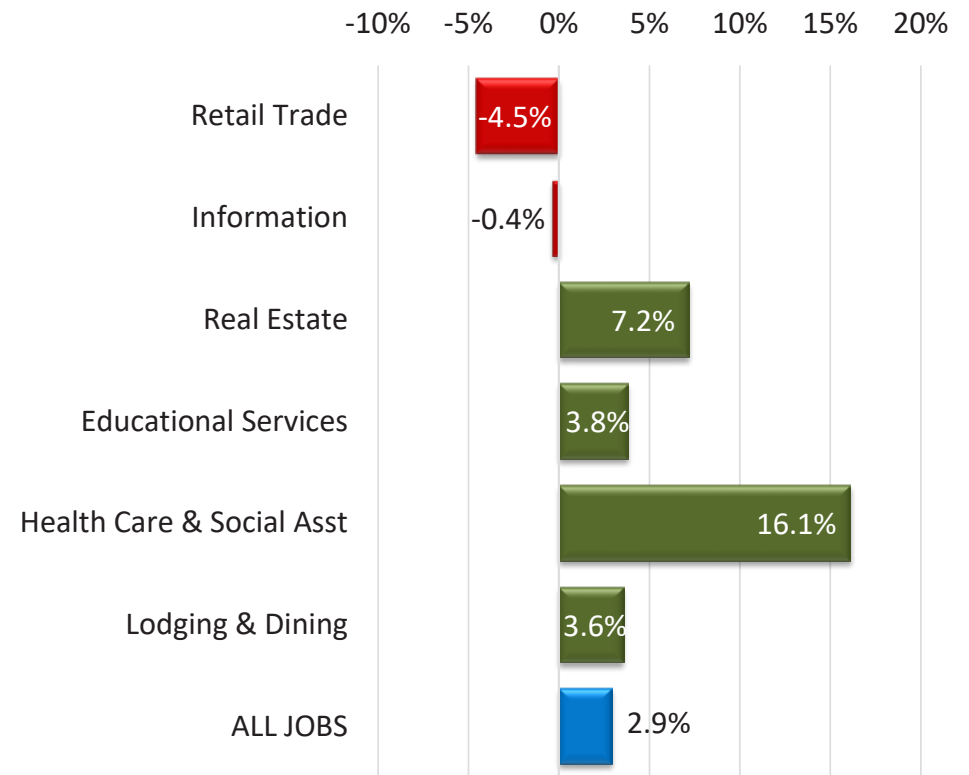
ST. LOUIS REGIONAL EMPLOYMENT PROJECTIONS 2018 TO 2028: SECTORS WITH CURRENT STRENGTHS IN NORTH ST. LOUIS COUNTY

Again, retail jobs are projected to decline in the St. Louis region by 4.5% over ten years, a factor which would sharply impact North County. Productivity gains, as projected at the national level, however, would like result in sharply increased retail sales in North County.

Other strong sectors in today's North County should see above average growth rates in the St. Louis area, other than the information sector. Information, however, is projected to see a 35.8% increase in national output as technology and automation replace many jobs.

St. Louis Region Job Growth in Strong Sectors of North St. Louis County, 2018-2028

Source: Missouri Economic Research & Information Center (MERIC)

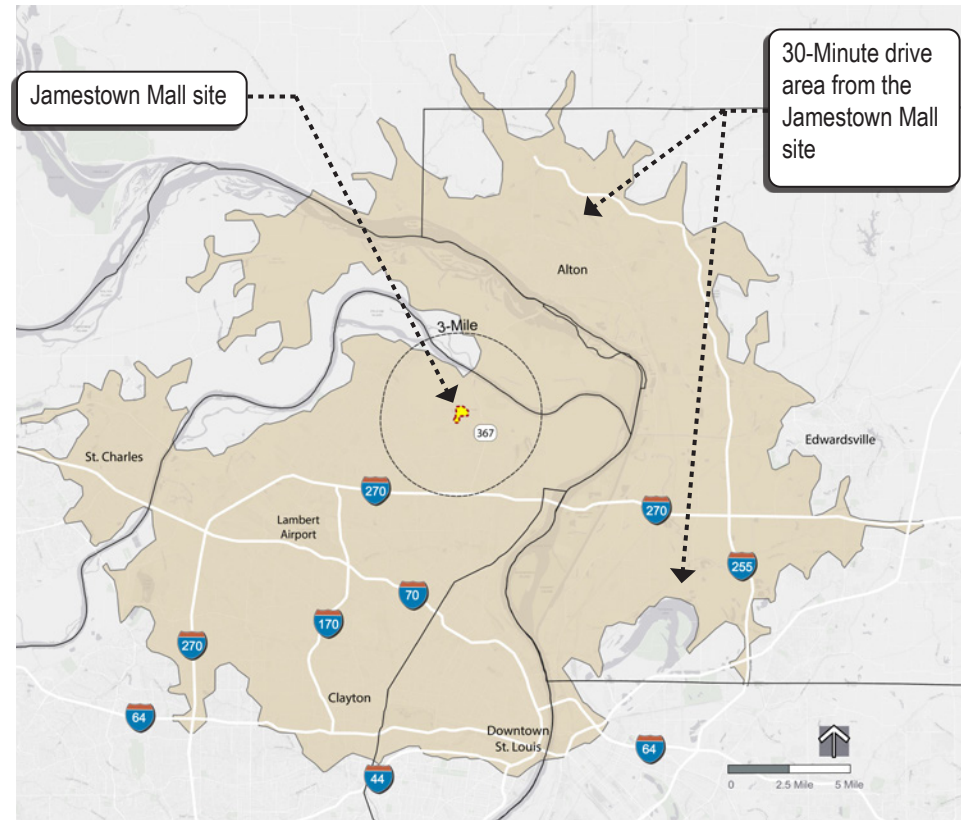


JOBS BY INDUSTRY SECTOR WITHIN 30-MINUTE DRIVE OF JAMESTOWN MALL SITE

Industry Sector (Top Ten Sectors by Number of Jobs)	Count	Share
Health Care and Social Assistance	122,346	18.6%
Manufacturing	57,273	8.7%
Administration & Support, Waste Management and Remediation	55,161	8.4%
Accommodation and Food Services	52,462	8.0%
Professional, Scientific, and Technical Services	45,398	6.9%
Retail Trade	44,233	6.7%
Educational Services	41,068	6.2%
Finance and Insurance	39,846	6.1%
Wholesale Trade	33,976	5.2%

Source: 2019 Census 'On the Map'

The above table shows the top ten industry sectors by the number of jobs within a 30-minute drive of the Jamestown Mall site. The following pages include maps of job locations of each of the industry sectors.



Base Map

CONCLUSIONS: JOB GROWTH IN NORTH COUNTY

North St. Louis County, here defined as north of I-270, is well positioned to capture more of the employment and economic growth projected for the St. Louis area. It is centrally located in the region between east and west, but it suffers from a lack of centrality north to south. Thus, the strongest location for future growth is most likely along the I 270 corridor which enables fast access to all parts of the region for the movement of goods and workers.

But growth in the St. Louis area is projected to be sluggish, absent substantial economic development initiatives. This is a somewhat national challenge, too, with job growth rates slowing down over the next decade or so. But St. Louis could be slower than that. Thus, competition for added job growth in the region and in the nation will become more intense.

The Jamestown Mall site is not all that well positioned to compete strongly in this environment. It is not served directly by the interstate highway network and it has a relatively low population and workforce density nearby. **Still, it is a large site in Missouri's largest county and economic region. Targeting unique opportunities suitable to North County but also with national markets will could very well attract a substantial number of high value businesses and jobs.**

SENIOR HOUSING MARKET: OVERVIEW

The senior population is on the rise in North County, though this growth will be concentrated in “older” seniors for the next 15 years or so. These people are part of the post-World War II Baby Boom generation. The Boomers were followed by a smaller cohort.

As time passes, Boomers who were of the “younger senior” groups (55 to 69) will be replaced by a shrinking number of younger seniors. Meanwhile, the Boomers will increase in age, boosting the number of “older seniors” (70 and above) even as younger seniors decline.

And most of these older seniors will be women.

St. Louis County as a whole also faces these important demographic changes. Facilities and services for a growing population of aging seniors will be necessary. This will include more housing options that cater to those being less mobile as well as to those becoming infirm. More leisure spaces and walking (good exercise!) trails will be in demand as the aging seniors retire from full time work.

Market-based opportunities will expand to home health care services, lower grocery demands (seniors eat less!), but higher drug store demands. Seniors are not clothing shoppers like younger generations, but they need comfortable clothes and, especially comfortable shoes. They may eat out at restaurants less often, too, but seniors also tend to eat earlier than the rest of the population for dinner. Restaurants that can accommodate early diners and later diners could enjoy more revenue. Portions would be smaller, though seniors like “doggie bags” for additional meals at home.

Along with attention to health care will be demands for attention to wellness care—staying fit to minimize chances for illness, extend life, and enhance quality of life. This should be a boon to gyms and related exercise facilities, but perhaps also for dance studios where greater socialization can accompany good exercise. Community senior centers will be necessary, as will more methods for non-driving vehicular movement, such as taxi cabs, on-demand transport, and even golf carts for short trips.

A cohort-survival method for projecting population applies an expected death rate¹ to an age cohort (in this case, five-year cohorts) to estimate how many of the people in that cohort who are alive today are likely to be alive in five years.

For North County, the calculations start with the 2026 projection of population by age cohort (separately for males and females) as provided by Esri. These numbers are adjusted downward through 2036 using U.S.A. death rates by age group as of 2019 (published by Statista in 2022).

This method does not account for “move-ins” to North County, or “move-outs” by these age groups, however. For instance, if a senior housing development was built at Jamestown Mall, this might attract seniors from outside North County as well as those presently living in North County.

Such in-and-out movement might change the overall population numbers.

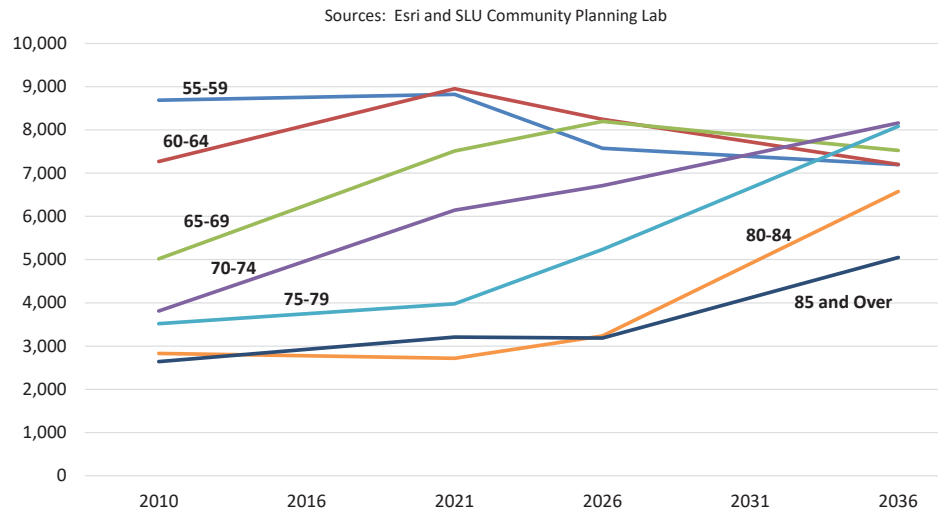
Esri estimates that there were 41,330 residents of North County over the age of 55 in 2021. This represented almost one-third (32.7%) of all the population in North County (126,280).

By 2026, Esri projects that the senior population will expand to 42,400, or 33.6% of the North County population. Seniors would increase by 2.6% between 2021 and 2026, while the total population would remain virtually the same (126,290).

Cohort survival projections by the Community Planning Lab indicate that North County seniors would increase by another 8.8% between 2026 and 2031, then another 7.9% between 2031 and 2036. The senior population would be about 49,790 in 2036, up from 41,330 in 2021. Separate projections of the total population to 2036 were not computed.

¹) Birth rates would be applied to estimate new entrants to the population, but this analysis focuses solely on seniors, so birth rates are not applicable.

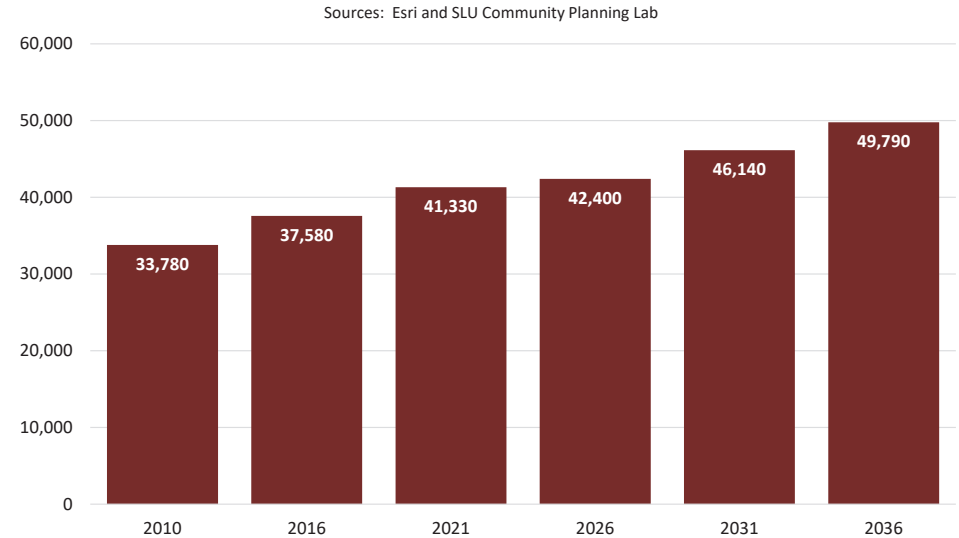
SENIOR POPULATIONS BY AGE GROUP: 2010 TO 2036 NORTH ST. LOUIS COUNTY



The aging Baby Boom generation looms large in these projections. Senior age groups that will be 70 years or older in the coming years are expected to increase in number in North County by 2036. Younger senior numbers will decline. The net effect, however, is growth in senior residents.

The oldest surviving Baby Boomers will be 90 in 2036, the youngest 72.

TOTAL SENIOR POPULATION: 2010 TO 2036 NORTH ST. LOUIS COUNTY

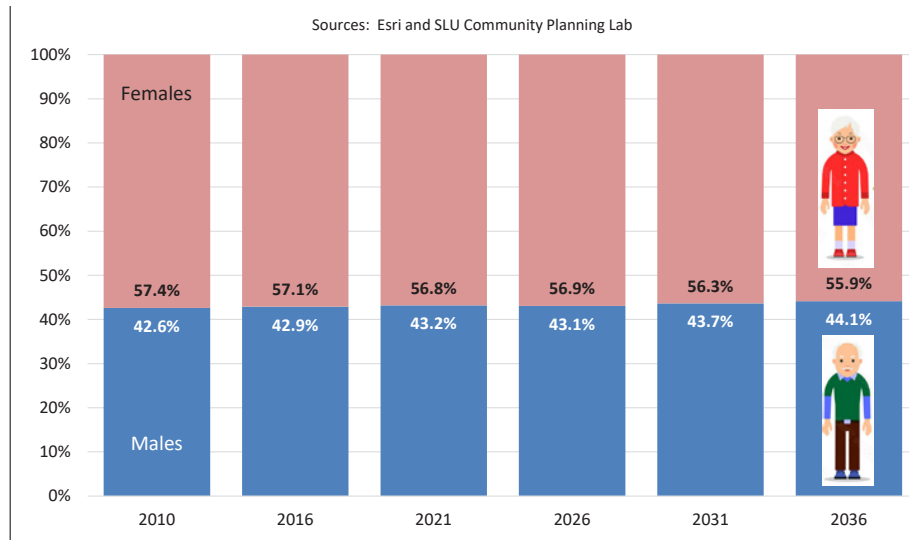


The total senior population is projected to reach nearly 50,000 in North County by 2036, from just over 40,000 in 2021.

This would be a 20.5% increase in 15 years. While equivalent projections for the entire North County population are not available, U.S. Census projections indicate that America's total population will increase at only about half that rate.

SENIOR POPULATIONS BY SEX: 2010 TO 2036

NORTH ST. LOUIS COUNTY

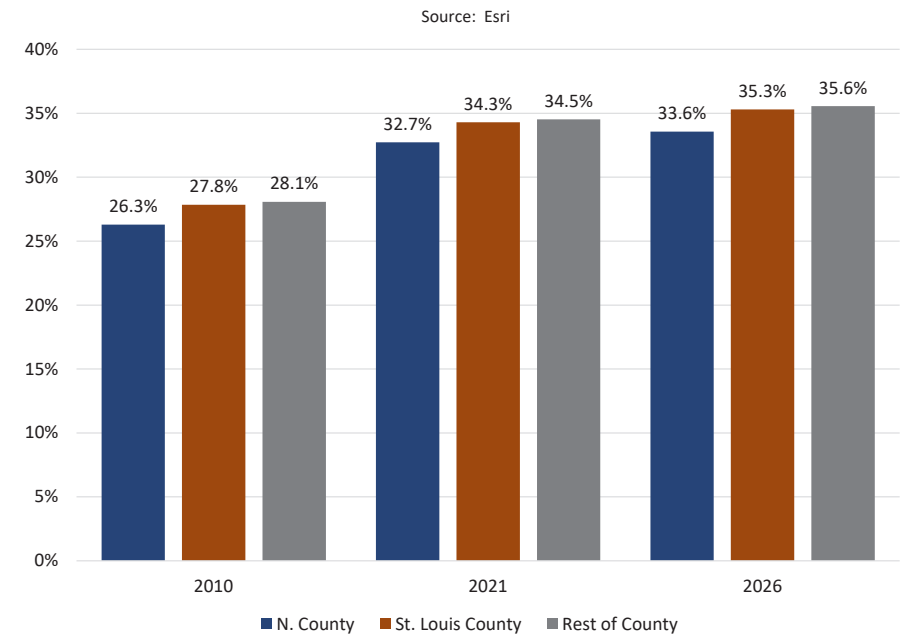


Senior women in North County already greatly outnumber the men by a ratio of 56.8% to 43.2% as of 2021.

This ratio is not projected to change substantially by 2036, although the men will gain a slightly larger share of the senior population.

SENIOR POPULATION AS PERCENT OF TOTAL POPULATION

NORTH ST. LOUIS COUNTY AND ST. LOUIS COUNTY AS A WHOLE



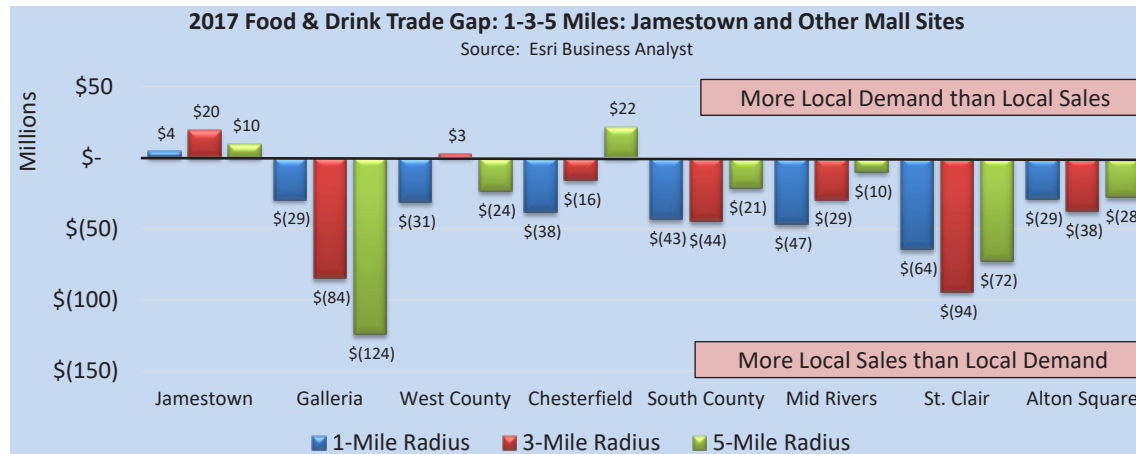
While senior populations are on the rise in North County, their percentages are still lower, as a share of total population, than in the rest of St. Louis County.

In 2021, seniors made up 26.3% of the North County population, but 28.1% in the rest of the county (that is, excluding North County).

By 2026, the share of seniors in the county will generally increase, but North County will still have a slightly smaller percentage than the rest of the county.

Keep in mind, of course, that, in Jamestown Mall's case, retailing is quite heavily dominated by the City of Florissant, and most of that is along Lindbergh Boulevard not far west of Jamestown. This concentration of retail spreads further into Hazelwood along Lindbergh and is certainly reinforced here and there along I 270. Florissant benefits from about twice as much retail sales than its own population can support. Much of North County is dependent, therefore, on the many convenient retail offerings of Florissant and Lindbergh Boulevard, but none of those offerings are in regional malls.

FOOD AND DRINK: DEMAND AND SUPPLY GAP: 2017

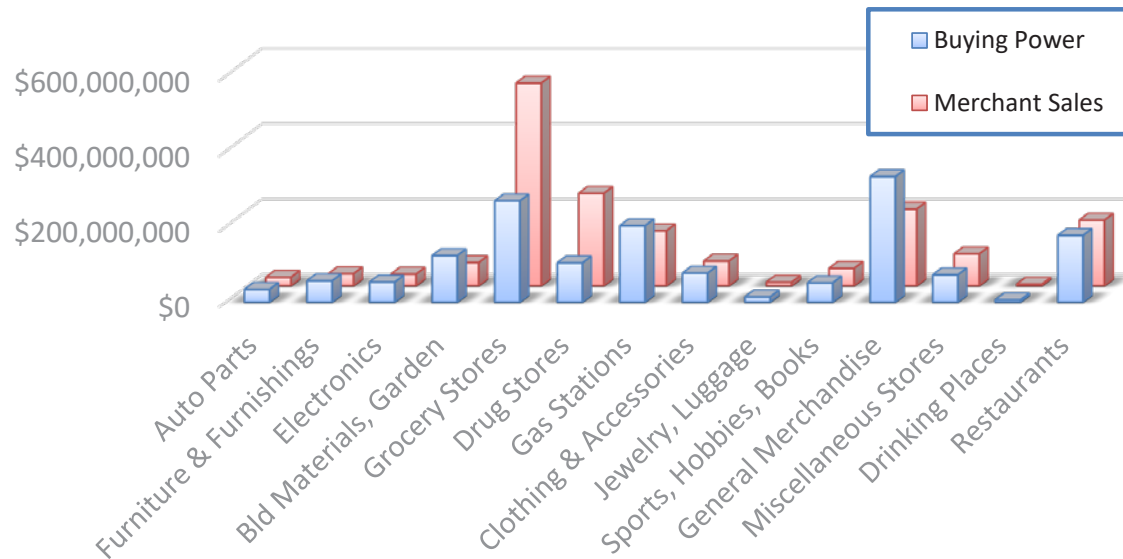


Much the same is true for the food and drink markets (restaurants and bars, not food and drink at home). These areas that are centered on regional malls have no economic need for additional places to eat and drink. An important exception, though at a relatively small scale, is Jamestown Mall. All three radii could support more dining and drinking experiences. As it is, some of the demand from this area must now spend its money outside the radii.

NORTH COUNTY IS NOT DEVOID OF RETAIL OPTIONS

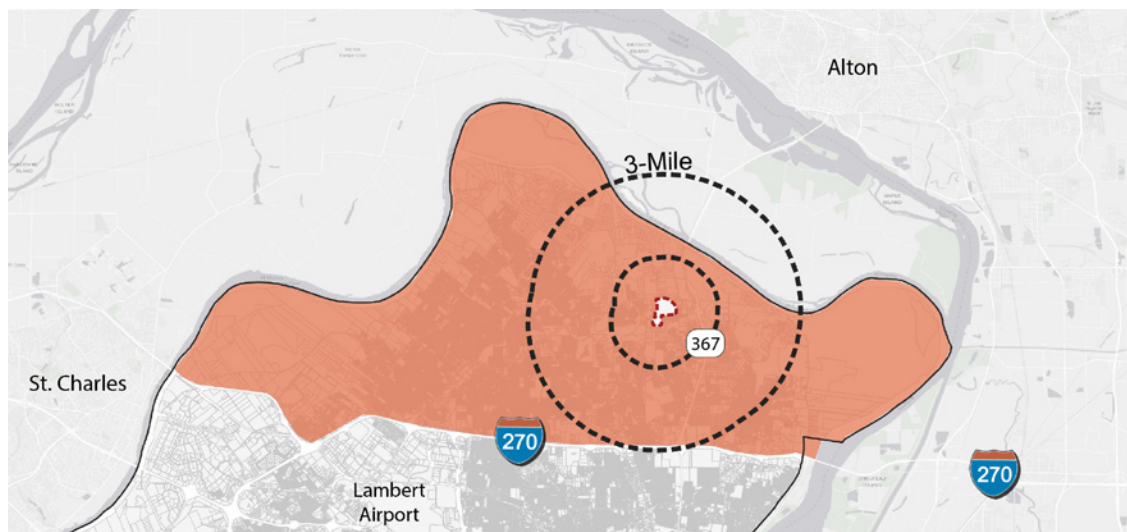
Annual Retail Buying Power & Sales, North St. Louis County

Source: Esri

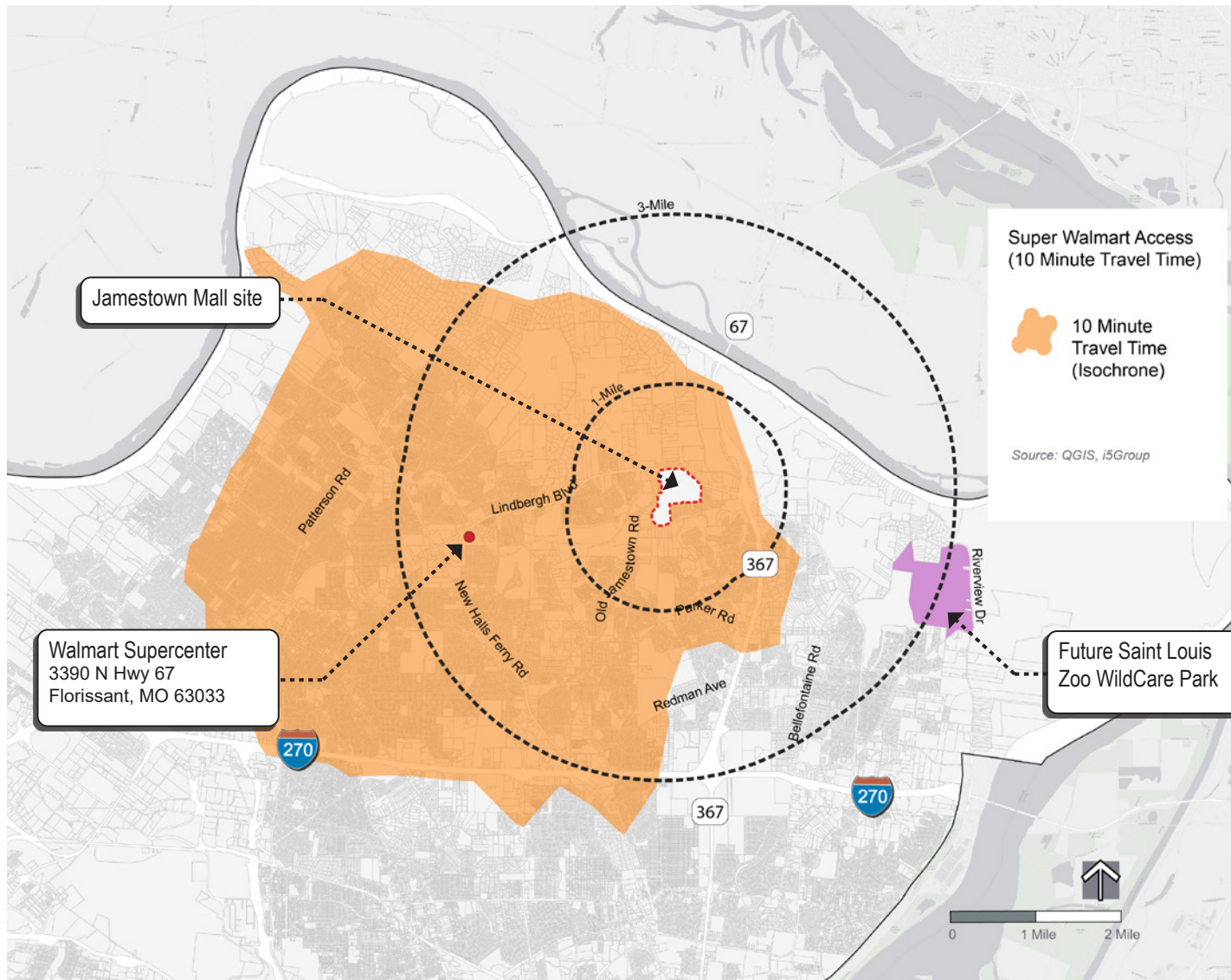


Despite no nearby “mall,” North County (shown here north of I-270) has no shortage of retail stores, but there is room for more eating and drinking places. Again using 2017 data, retail sales in North County exceeded household demand from North County residents by some \$450 million, enough to support almost 100 retailers at average sales-per-store. That is, the equivalent of 100 average stores are supported by non-North County shoppers.

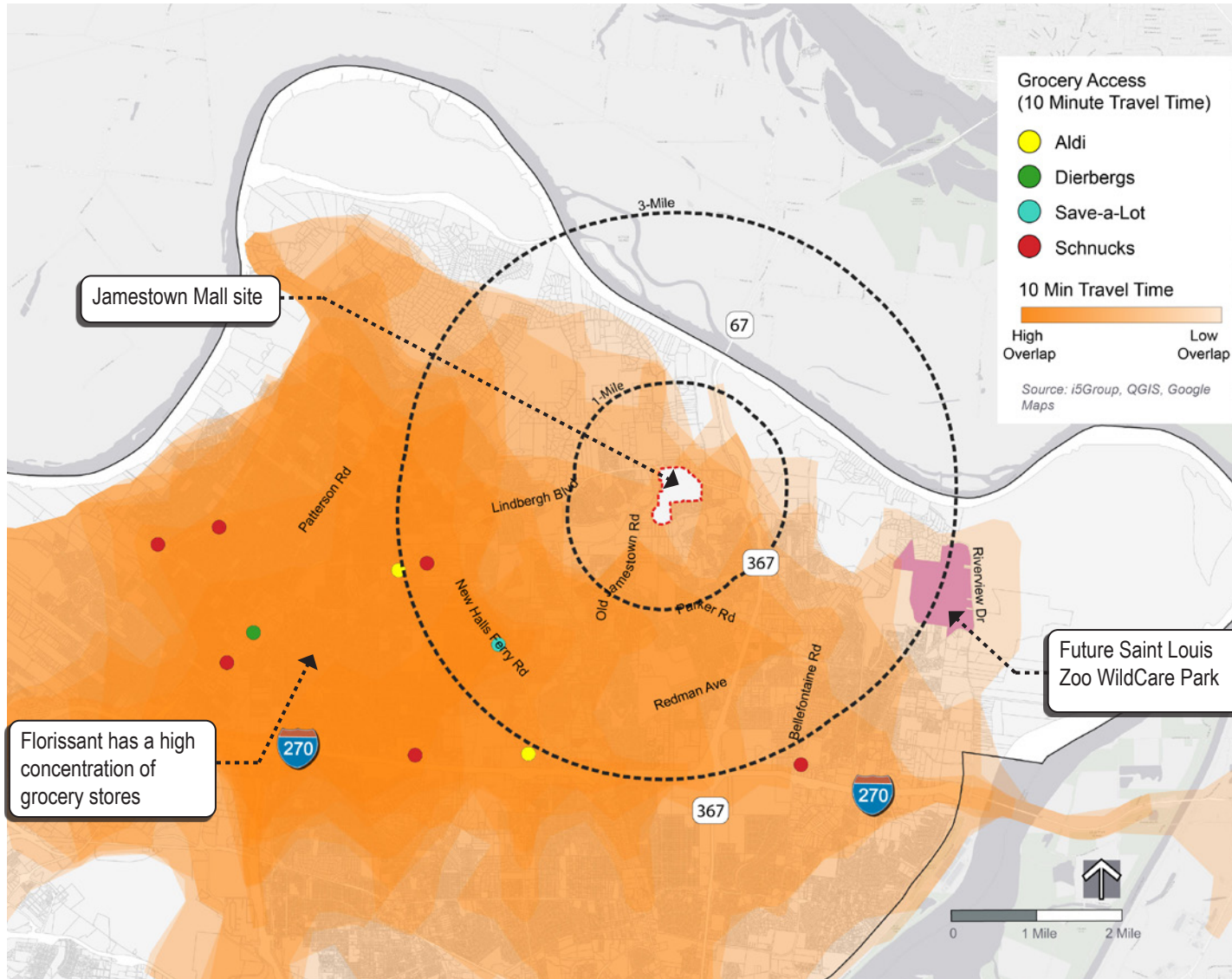
Demand exceeds sales, however, for eating and drinking places by the equivalent of about ten additional establishments.



WALMART: 10 MINUTE DRIVE TIME AREA



EXISTING GROCERY STORES: 10 MINUTE DRIVE TIME AREA



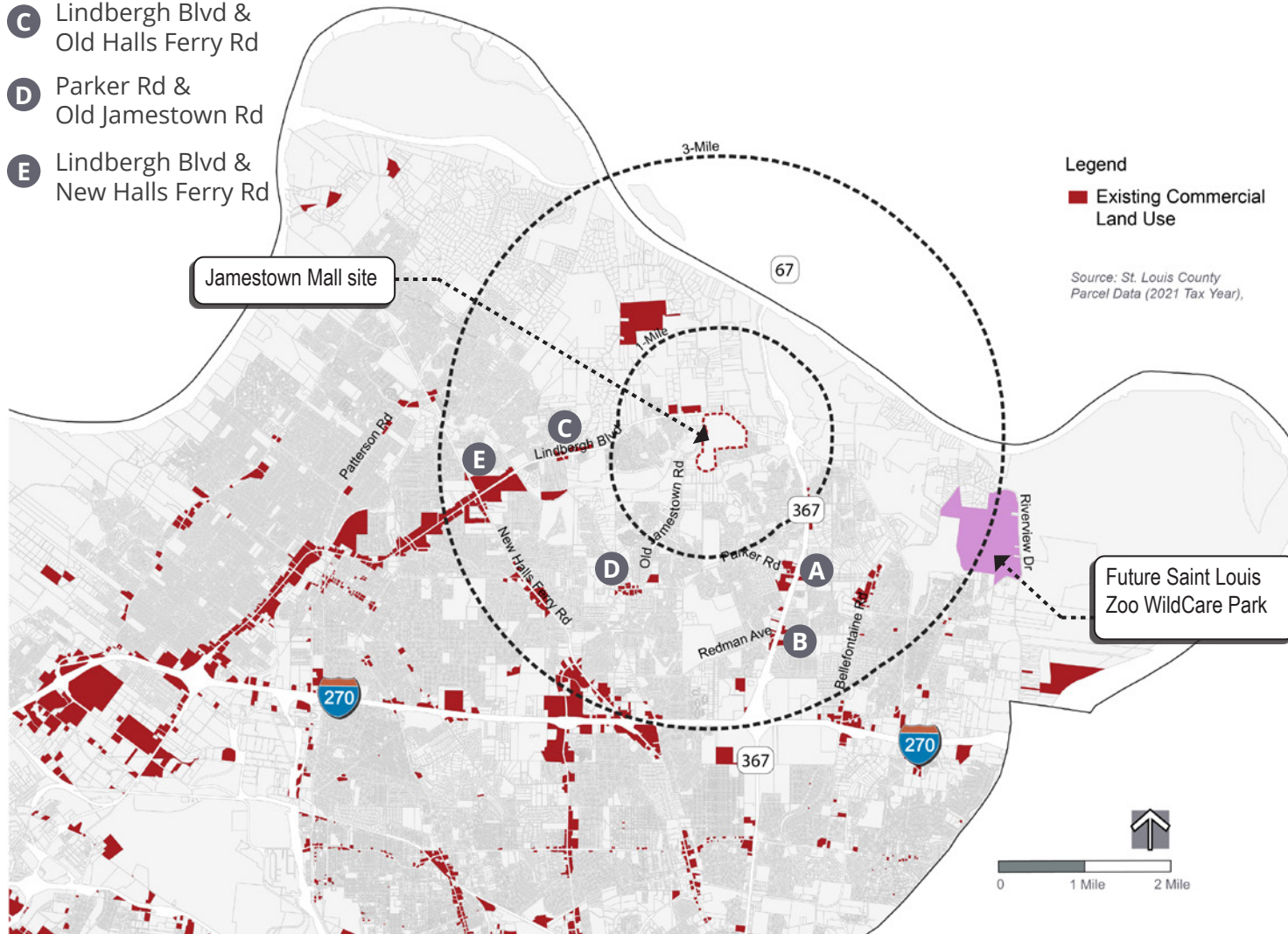
The map on this page shows major grocery stores north of I-270 and the 10-minute drive area to each store.

While Florissant has a high concentration of grocery stores, there are no major grocery stores north of New Halls Ferry Road and Redman Avenue. These areas are mostly within a 10-minute drive of a store, but have more limited options than compared to other parts of north county. In addition, walkable or transit options are especially limited.

This map only includes traditional stand alone grocery stores. It does not include other retail outlets (such as the Walmart Supercenter and Target in Florissant) that carry groceries.

EXISTING COMMERCIAL AREAS: EVALUATION OF DEVELOPMENT OPPORTUNITIES

- A** Hwy 367 & Parker Rd
- B** Hwy 367 & Redman Rd
- C** Lindbergh Blvd & Old Halls Ferry Rd
- D** Parker Rd & Old Jamestown Rd
- E** Lindbergh Blvd & New Halls Ferry Rd



The Jamestown Mall site is not the only opportunity area for retail and commercial development. There are many existing commercial nodes in north St. Louis County.

The following pages examine five of the closest commercial nodes to the Jamestown Mall site for opportunities for new development. The categories of opportunities include:

- Available Building Space
- Site Ready
- Greenfields
- Demolition or Rehabilitation

The two existing commercial nodes along Highway 367 include **over 25 acres of potential development opportunity.**

EXISTING COMMERCIAL AREAS: OPPORTUNITY AREA DEFINITIONS

Available Building Space

Available vacant building space.



Site Ready

Out parcel or other vacant parcel within or near an existing development. Current grading (topography) for development and assumed to be site ready.



Greenfields

Nearby greenfields (vacant) likely suitable for development based on existing aerial photographs and topography. Utilities, ownership, and other factors are unknown.



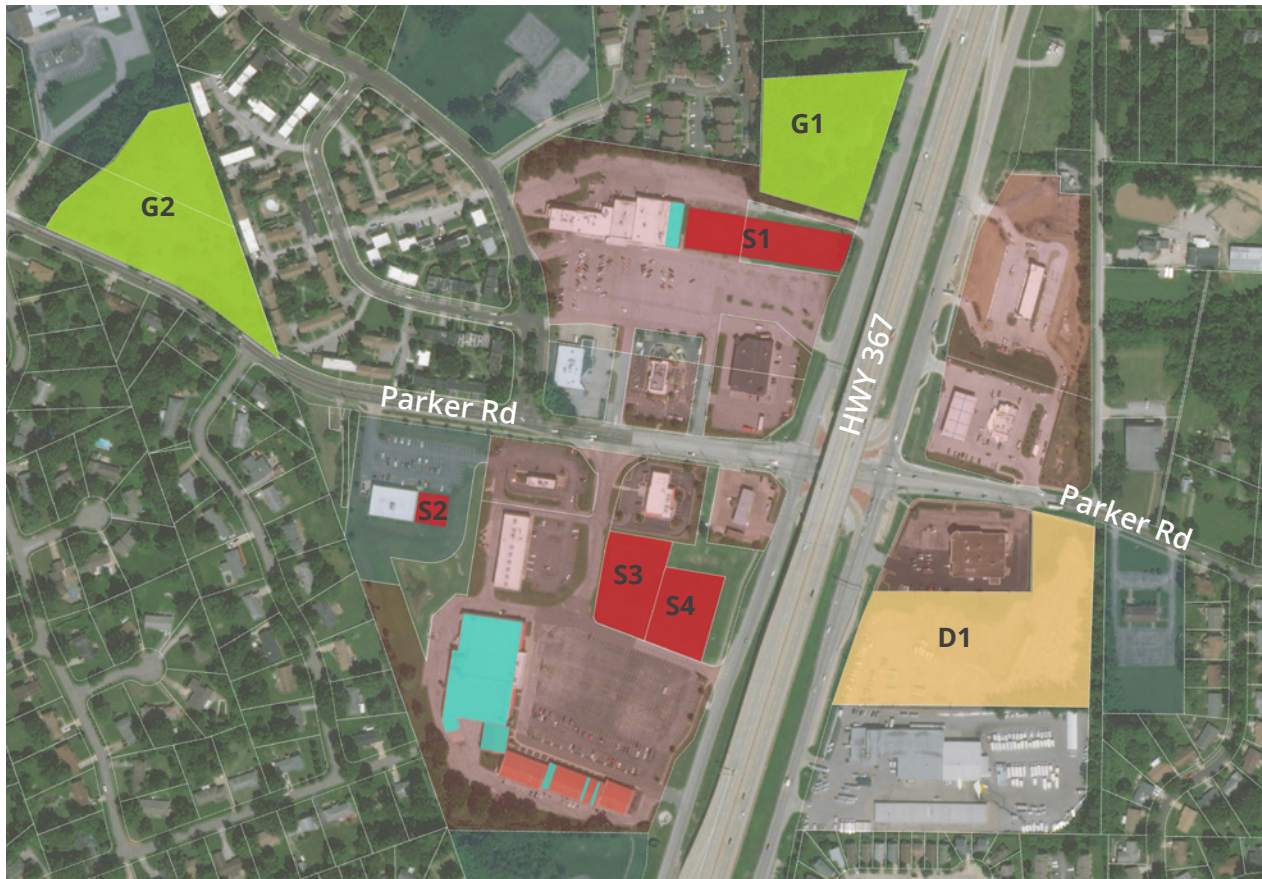
Demolition or Rehabilitation

Existing buildings or remains of past development will require demolition or extensive rehabilitation.



A. HWY 367 & PARKER ROAD: OPPORTUNITY AREAS

■ Available Building Space	■ Site Ready	■ Greenfields
<u>Large-Medium Box</u> 50,000 SF <u>Small</u> 1,200 SF 900 SF 1,800 SF 2,400 SF 1,200 SF 1,200 SF 5,040 SF	S1: 1.1 acre S2: 0.2 acre S3: 1.0 acre S4: 0.8 acre ■ Demolition or Rehabilitation D1: 5.3 acre	G1: 2.8 acre G2: 3.9 acre
Total Building Space: 63,740 SF	Total Acreage: 15.1 acres	



Accounting, Tax Preparation, and Bookkeeping
Jackson Hewitt

Auto
Carwash

Beauty
Hair Salon
Kings's Beauty
May's Nails

Check Cashing/Loans
Check 'n Go

Gas Stations
Quicktrip
Gas Station

Financial
Bank of America

General Merchandise
Dollar General
Family Dollar

Health Care
Advance Surgical Care
Fresenius Medical Care
VA Outpatient Clinic
Washington University
Dialysis

Health Retail
CVS Pharmacy
Walgreens

Restaurants
Casual
Imo's Pizza
Moma Elayne's Kitchen
Rookies Bar & Grill

Fast Food
China King
China Wok
St. Louis Fish and Chicken
McDonalds
Subway
Taco Bell

Storage/Moving
UHaul

Wireless Communications
Phone Stop

B. HWY 367 & REDMAN ROAD: OPPORTUNITY AREAS

■ Available Building Space
 ■ Site Ready
 ■ Greenfields

G1: 2.5 acre

■ Demolition or Rehabilitation

D1: 2.7 acre

D2: 0.7 acre

D3: 0.6 acre

D4: 0.9 acre

D5: 1.6 acre

D6: 0.7 acre

D7: 1.9 acre

Total Acreage: 11.6 acres

Auto

Auto Sales 1

Auto Maintenance 1

Auto Maintenance 2

Beauty

Nail Salon

Daycare

Daycare 1

Daycare 2

Office

Office 1

Office 2

Misc Retail

Bait and Tackle

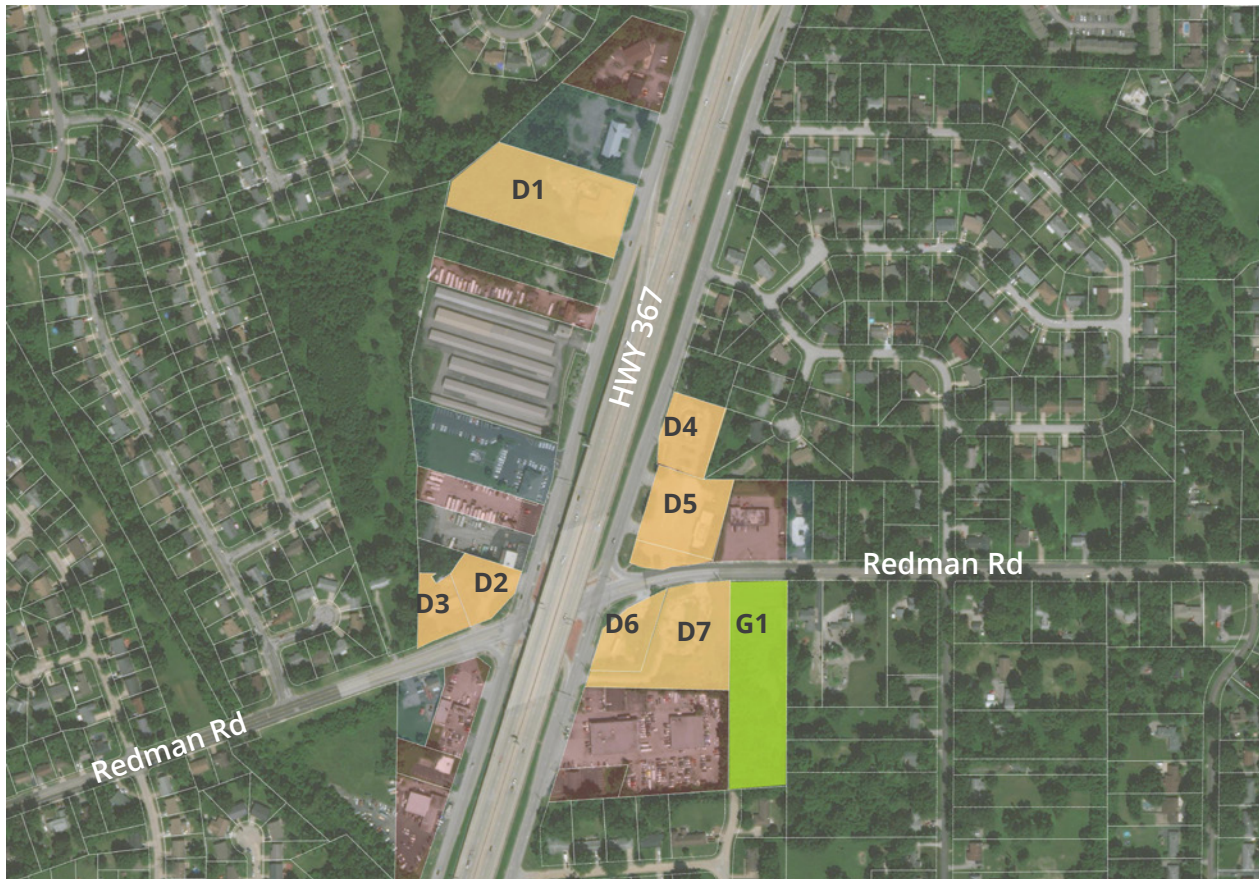
Storage/Moving

Storage Units

RV Storage

Other

St. Louis County Police



C. LINDBERGH BLVD & OLD HALLS FERRY : OPPORTUNITY AREAS

Available Building Space Site Ready Greenfields

G1: 1.4 acre

Demolition or Rehabilitation

D1: 2.7 acre

Total Acreage: 4.1 acres



Civic

St. Louis County Library
(Jamestown Bluff
Branch)

Auto

CarX

Beauty

Barber

Daycare

Kids Zone

Financial

First Bank

Gas Stations

BP

Mobile on the Run

Office

Office 1

(home health care)

Office 2 (accounting)

Office 3 (accounting,
insurance, home health
care, other)

Misc Retail

Dog Grooming and
Training

Healthcare

Dentistry 1

Dentistry 2

Dentistry 3

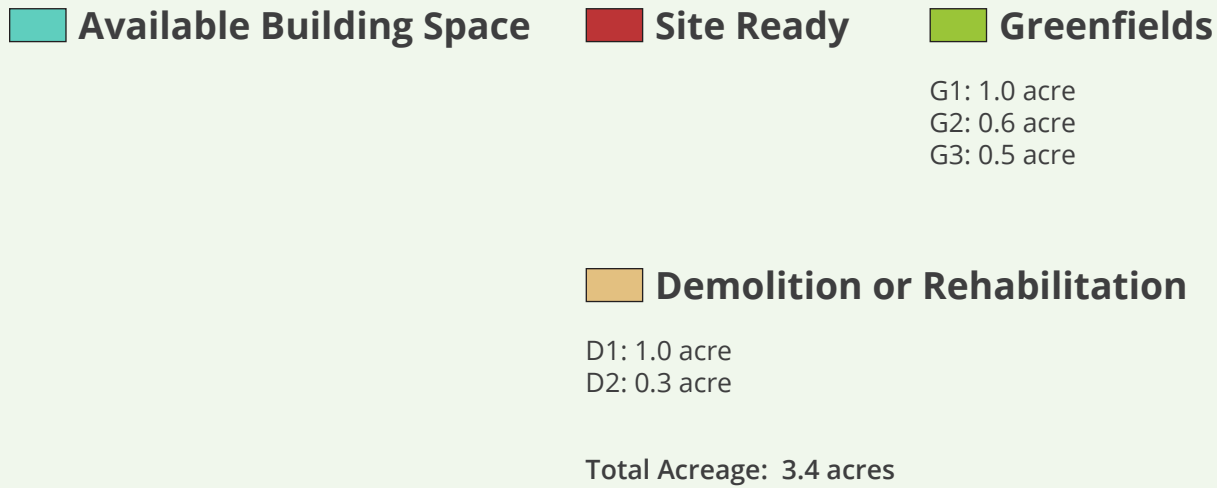
Orthodontics

Restaurants

Casual

Kitty's Corner

D. PARKER RD & OLD JAMESTOWN RD : OPPORTUNITY AREAS



Civic
Black Jack City Hall
Fire Station

Auto
Transmission Repair

Beauty
Barber 1
Barber 2
Nails
Salon

Contractors
Electrical and Home
Repair

Daycare
Daycare 1

General Merchandise
Family Dollar

Office
Office 1
Office 2
Office 3
Office 4
Home Health Care

Misc Retail
Cleaners 1
Cleaner 2
Florist
Lawn Mower Shop
Liquor Store

Health Retail
Walgreens

Restaurants
Fast Food
Dominoes

Casual
Meyer's Country
Cottage
Pizzeria

Other
Dance Studio

E. LINDBERGH BLVD & NEW HALLS FERRY RD: OPPORTUNITY AREAS

■ Available Building Space ■ Site Ready ■ Greenfields

Large-Medium Box
B1: 117,000 SF
B2: 30,000 SF

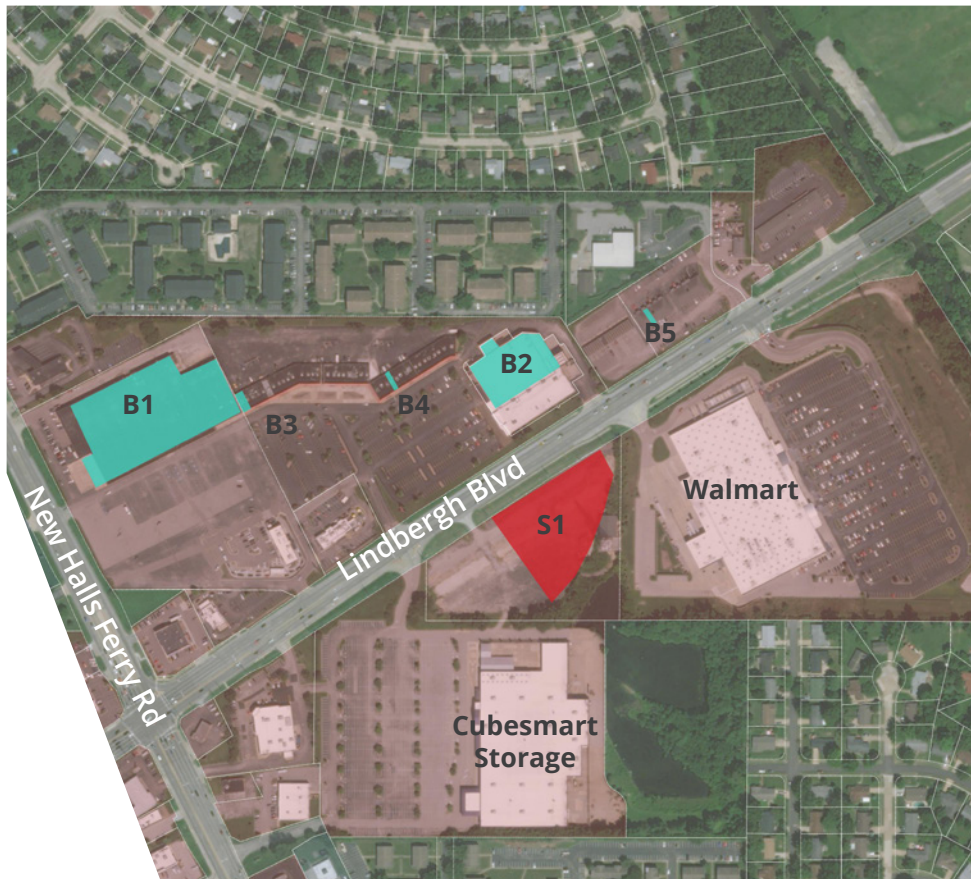
Small
B3: 2,280 SF
B4: 900 SF
B5: 1,000 SF

S1: 2 acres
(approx, site still
under development)

■ Demolition or Rehabilitation

Total Building Space: 151,180 SF

Total Acreage: 2 acres



Check Cashing/Loans
LoanMaster

DayCare
Mary Margaret Daycare
& Learning Center

Financial
Bank of America
FCB Bank

Fitness
Planet Fitness
SDO Fitness

General Merchandise
Dollar Tree
Walmart Supercenter

Health Care
Urgent Care

Health Retail
Walgreens

Misc Retail
A&C Wine and Spirits
CBD Kratom
The Cave Anime Outlet &
Smoke Shop
Cross Keys Vacuum
Design It
Leidos Cleaners

Office
Event Visions
State Farm
Edward Jones
Eagle Group Realtors
Healthcare Solutions
People Ready
Regional Finance

Pets
Pet Planet (grooming)

Restaurants
Casual
Cecil Whittaker's Pizza

Catering
One Dish Wonders

Coffee/Cafe
Creations Smoothie

Fast Food
Burger King
Chik-fil-A
McDonalds
ModPizza
New York Grill
Old St. Louis Chop
Suey

Storage/Moving
Cubesmart Storage

Auto
AutoZone
Club Car Wash
Discount Tire
Imported Car Repair
The Pit Crew
Take 5 Oil Change
Self Service Car Wash

Bakery
LaPatisserie

Beauty
Angie's Pro Nails
Barber Beauty
Favour Barbor
Maxi Beauty
Mean Streak Hair
Salon
Sid's Eyebrow
Threading
Studio Cutz Salon
Studio 6 Salon
VCLABEL Beauty Bar
Waxtician Studios

RETAIL ENTREPRENEURIAL OPPORTUNITIES: FINAL THREE LAND USE SCENARIOS

This section explores a local and small business development and tenanting strategies and provides additional detail for a development strategy targeting small and local businesses. Case studies provide additional context for how the strategy could manifest in similar neighborhood conditions.

Considering the market opportunity to support additional food and beverage (F&B) retailers and the racial makeup of North County, Black-owned restaurants are likely the most opportune category to meet unmet demand in the community. However, restaurants are one of the most capital-intensive and risky businesses in the retail industry.

Potentially a destination dining strategy can align entrepreneurial endeavors with the ability to capture a geographically expansive audience. Particularly because there remains a challenge in attracting customers from dense neighborhoods further west. But to ensure sales potential, the scenario selected should provide a breadth of customers on-site to overcome the lack of residential density nearby.

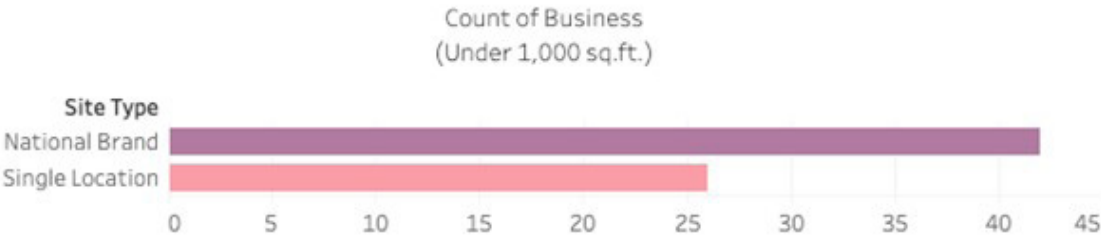
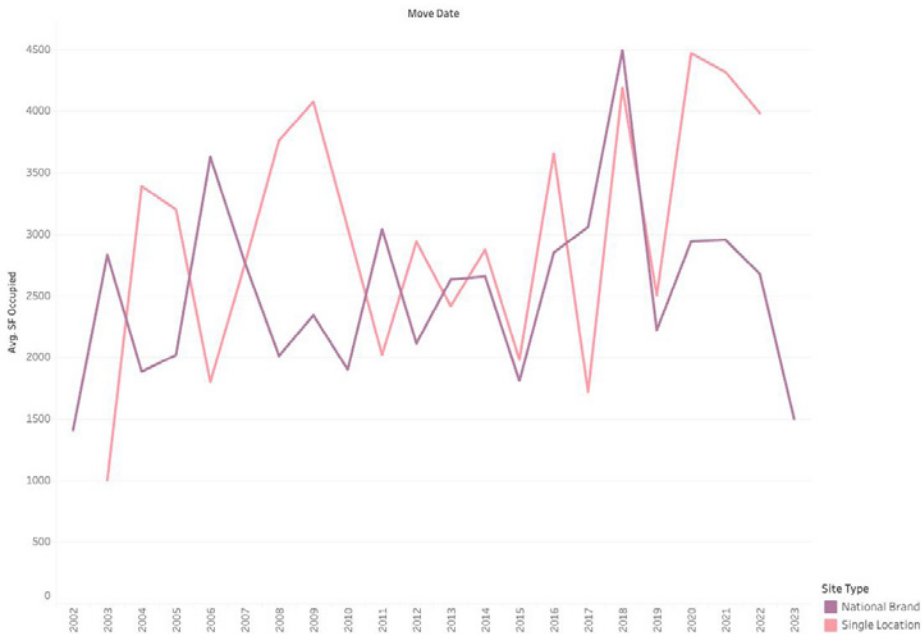
The physical design of retail development matters, as independent businesses without an established customer base must win over new customers. Siting the retail space adjacent to essential community amenities (such as playgrounds, amphitheaters, and dog parks) can promote additional market opportunities. Identify a ladder of vending opportunities can provide more retail space at a lower cost for the entrepreneur and aligned programming could support revenue generation for all businesses on-site and a desirable neighborhood for the residential and office population. (e.g., farmers' market and food trucks for special event days, brick-and-mortar, kitchen incubator, etc.)

Food & Beverage Establishment Square Footage Leased

Analysis conducted by the larger consulting revealed that smaller spaces were largely occupied across North County. Building upon this finding and the food and beverage strategy outlined in the previous memorandum, the &Access team analyzed national and local food and beverage tenants’ average occupancy across the region.

The chart to the right demonstrates that leases executed by national and local businesses were comparable in average size. Single location food and beverage businesses across the region occupied approximately 500 square feet more space than national brands (3,217 and 2,702, respectively). This finding further illustrates the demand for smaller spaces. Our team assumes national brands are likely able to demonstrate space efficiencies through honed prototypical designs while single location businesses occupy spaces available.

It remains undetermined if tenants would readily occupy micro spaces (less than 1,000 square feet), if more were available. Data demonstrates that businesses (both national brands and single location businesses) occupy spaces smaller than 1,000 square feet (see chart below). As such, it will be a sound investment for a development team to explore a range of small retail space square footages that are attractive to both national and local businesses.



Local Retailers & Restaurateurs Strategy: Jamestown Green Estates

The on-site residential population provides for an immediate customer to collocated retailers and can help to guarantee a portion of the revenue required for operations.

Pair development with programming to bring people on-site. Consider aligning development with the specific brand of the development – a focus on solar energy and/or agriculture. Focus on agriculture will have more opportunities for tenant alignment, for example:

- Full-service restaurant with an on-site small-scale farm to source produced for menu items
- Alcoholic beverage manufacturer such as a brewery or distillery
- Seasonal farmers market
- Small scale grocer with locally sourced goods
- Open space for recreation

Case Study: Civano New Town

This 270-acre New Urbanist neighborhood with adjacent 55-acre “town center” is co-located in Tucson, AZ. The Town Center includes an activity center/meeting hall, live/work residences, light industrial manufacturing buildings, medical office, complex, and a gas station. Retail on-site includes:

There are 650 high-efficiency homes, many with carriage homes. Thirty-five percent (35%) of the space is open with a mix of natural desert, landscaped parks, sport fields, community gardens, and paths and trails.

The tenant mix showcases the limited ability to support retail in edge conditions like Jamestown Mall.



Civano Tenant Mix

- Food & Beverage: Our Sweet Lil' Cakery
- Shopping: The Drizzy Lizard Gift Shop
- Salons: Painless Permanent Makeup & Prayer, Path to Wellness Massage, Bella Body
- Professional Office: Al Nichols Engineering Incs, Civano Eyecare, Bridge Group

More at: <https://www.terrain.org/2019/unsprawl/civano/>



Local Retailers & Restaurateurs Strategy: Jamestown Village

Ensure retailers offer goods and services aligned with the 15-hour user base:

- Coffee, sundries, etc. for morning
- Quick bite food and drink businesses for lunch and dinner meal periods
- A full-service restaurants for dinner service
- Limited shopping and fitness

Consider developing neighborhood amenities (e.g., parks, public space, community centers) adjacent to storefronts and ensuring they are open to the larger community to ensure local businesses can be exposed to incidental customers.

Identify a ladder of vending opportunities to provide more retail space at a lower cost and align programming (e.g., farmers' market and food trucks for special event days, brick-and-mortar, kitchen incubator, etc.).

Explore the opportunity to offer emerging businesses partnership opportunities with corporate office tenants for catering.

Case Study: Serenbe, GA

Located in Fulton County, GA (in Metro Atlanta), Serenbe is a community that's intended to connect people to nature and to each other. Each of Serenbe's hamlets have complementary commercial centers focused on the elements of a well-lived life: arts for inspiration, agriculture for nourishment, health for wellbeing, play for a joy-filled life, and education for awareness.

Fresh food is another of Serenbe's natural assets, with a 25-acre organic farm, seasonal Saturday Farmer's Market, thriving CSA program and edible landscaping, including blueberry bushes along paths and sidewalks.

Year-round cultural events include outdoor performances from Terminus Modern Ballet, regional theatre, film series, culinary workshops and festivals, music events, and lectures, boutique shopping, art galleries, wellness services and trail riding, plus visiting artists in residence with classes, dinners and talks.

Serenbe offers a more robust tenant mix that aligns with a greater density on-site in comparison to Civano. The diversity of users at Serenby and its brand as a destination contribute to a range of revenue producing opportunities for its businesses. The businesses align with the brand of the development project, creating a unique opportunity that attracts customers time and time again. Note, this mix is more than what is recommended on-site, as Serenbe offers a hotel, educational facilities, and other attractions.

Source: Serenbe's website (<https://www.serenbe.com/>)



Serenbe Tenant mix:

- Arts: Art Farm, Chatt Hills Gallery, Paint Space
- Education: Acton at Serenby, Biophilic Institute. Camp Serenbe
- Food & Beverage: Bamboo Juices, Blue Eyed Daisy Bakeshop, The Farmhouse, Halsa, The Hill
- Grocery + Sundries: General Store, The Wine Shop at Serenbe, Serenbe Farms (CSA Program + Small Scale Farm)
- Lodging: The Inn at Serenbe, Portal
- Shopping: The Ballog, Forage & Flower Botanical Design Studio, Pro Bike Repair, Resource, Hamlin, Hills & Hamlets Bookshop, Honeycomb Consignment, SustainAble Home Goods, Typo Market
- Salons: Chai Vegan Spa & Salon, Creek Retreat, Proper Hair Salon, Spa at Serenbe
- Gym/Fitness: Egoscue of Atlanta, Gym & Indoor Cycling Studio, The Stables at Serenbe, Studio 13 Pilates, Serenbe Swim Club, Serenbe Trail Riding, Serenbe Yoga + Bodyworks
- Professional Office: Serenbe Real Estate, Center for Positive Change, Chiropractic at Serenbe, Collier Animal Hospital, Dental Wellness at Serenbe, Essential Wellness 360, Flourish Pediatrics, Land Plus Associates, Nygren Placemaking, Planning & Design, Precision Performance & Physical Therapy, Serenbe Development



Local Retailers & Restaurateurs Strategy: Agriculture And Energy Technology Annex

Pair annex development with programming to bring people on-site. Consider aligning development with the specific brand of the development – a focus on solar energy and/or agriculture. Focus on agriculture will have more opportunities for tenant alignment, for example:

- Alcoholic beverage manufacturer (e.g., brewery/distillery)
- Farmers' market
- Farm-to-table full-service restaurant

Case Study: Comus Inn, Dickerson, MD

Offering unequaled panoramic views, sweeping landscapes and historic charm, the Inn is located on 5.26 stunning acres at the base of Sugarloaf Mountain in Montgomery County, Maryland. With sprawling park-like grounds, The Comus Inn provides ample exploration and play opportunities for adults and children alike.

Promising accessible farm-to-table cuisine, The Comus Inn has welcomed Chef Sammy D as its Culinary Director. Featuring a world-class chef led restaurant, a craft beer garden, and a unique marketplace, all of our food & beverage offerings are created with a focus on a local approach. While our hope is that you always enjoy your time with us, our true goal is that you also leave The Comus Inn with fun memories of spending time with family & friends.

Although the density surrounding Comus Inn site is less than what is planned as the Agricultural and Energy Technology Annex, we recommend a similar tenant mix to contribute to serve neighborhood and on-site users food and beverage needs. Pairing a restaurant and alcoholic beverage manufacturing facility with a stellar public space will encourage visitors to return routinely.

Tenant Mix:

- Full-service restaurant
- Craft beer garden
- Unique marketplace

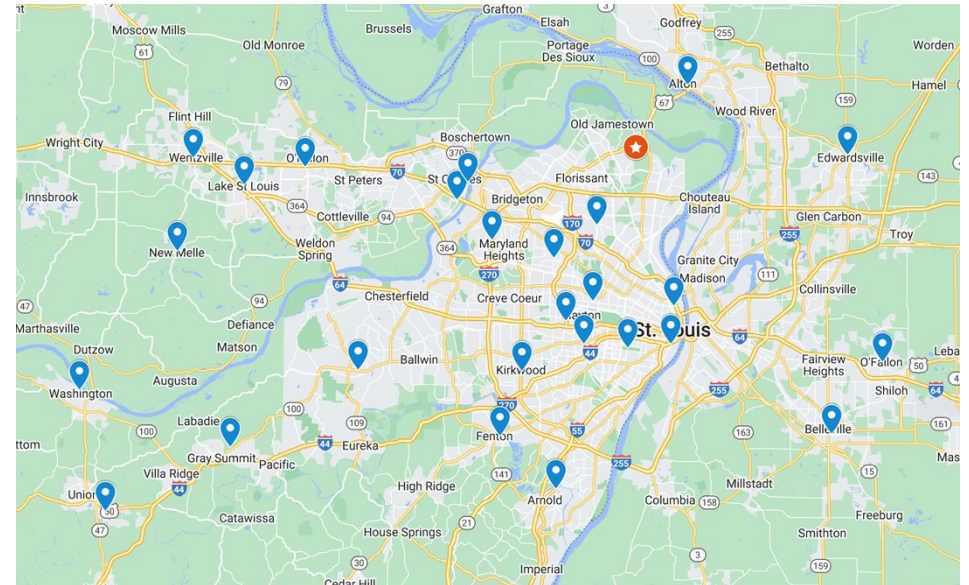
Source: <https://www.thecomusinn.com/>



Gap in North County Farmers' Markets

According to desk research conducted by the &Access team, there is a gap in farmers' markets offered north of I-70 in North County (see map this page – Jamestown Mall site identified by a red star icon). A farmers' market can complement the range of grocery stores located in nearby neighborhoods and our team recommends a farmers' market with both fresh produce purveyors and artisans to provide sales opportunities for small businesses interested in the local North County market. (Source: &Access; *St. Louis Magazine*, *St. Louis Sprout's Farmers' Market Guide*)

To facilitate this opportunity, consider both a permanent structure to provide shade and limit the need for the vendors to provide tents (left image below) or use uniform tenants to allow for vendors table merchandising strategy to speak for their brands and products (right image below).



Local Retailers & Restaurateurs Strategy: Conclusions

Small businesses, especially those in the food and beverage category, can serve a unique value add to the Jamestown Mall redevelopment regardless of typology. Food unifies communities across the globe and could do so for the North County residents. Access holds its recommendation to provide a range of opportunities for local businesses through vendor, mobile, and brick-and-mortar retailing.

Notably, there is a unique opportunity to produce and sale food and/or beverages on-site, a branding opportunity to attract customers from across the region. However, there are zoning implications of commercial sales of food produced on site and strategies for municipalities to take to facilitate this activity from temporary farm stands and community gardens to farm stands. Ensuring by-right establishment of these type of opportunities will help developers create projects as vibrant as Serenbe, Comus Inn, and Civano.

Regardless of the scenario pursued, our team recommends aligning retail along Lindbergh Blvd and, secondarily, Old Jamestown Road to capture the most sales opportunities. This recommendation conflicts with a couple of the above case studies' site, as retail is internal to the properties – a new urbanist approach to development.

Part 3: Section 6

UTILITY AND ROADWAY

The planning team reached out to the various utilities and agencies that impact the Jamestown Mall site for initial responses for the six potential land use scenarios.

UTILITY RESPONSES:

1. THE METROPOLITAN ST. LOUIS SEWER DISTRICT

Email Response From Mr. Eugene Johnson, P.E. (5/4/2022) States:

“Sanitary and Storm sewers’ are available within the Jamestown mall property. The site drains into the Coldwater Pump Station (06F4-059S). During the plan review and permitting process, the additional sanitary flows will be calculated, and the pump station will have to be analyzed with the additional flow to determine if the pumps will have to be upgraded and/or the 24-hour emergency storage increased. If pump station improvements are necessary, they will be considered part of the development and paid for by the developer.”

2. THE MISSOURI AMERICAN WATER COMPANY

Email Response from Mr. Matthew Lueders (6/2/2022) States:

“The former Jamestown Mall property is bordered by a 20-inch main along Lindbergh at Old Jamestown Road on the northwest corner of the property. The typical service pressure is between 95-psi and 110-psi. The mains in the surrounding area are distribution mains targeting residential services and residential fire flow rates. There is a 6-inch and 8-inch main to the west of Jamestown mall and a 12-inch main to the east at the termination of our distribution network.

Regarding capacity, we can provide adequate flow for each of the proposed development types from the 20-inch main which is well connected to our North WTP. Once more is known about the potential development, we can discuss specifics for layout, typical demands, and available fire flow rates.”

3. SPIRE ENERGY:

Email Response from Mr. Nick Eggert (5/9/2022) States:

“Following the demo of the mall and the abandonment of our facilities within the area, we’ll have 8” Intermediate Pressure mains along both Old Jamestown Rd and Lindbergh Blvd that should have sufficient capacity for the potential developments. Mike Langan would oversee small commercial developments, Pat Bloomfield would oversee large commercial developments, and CG Covey would oversee any residential.”

4. AMEREN:

Email Response from Mr. Zak Kaller, Career Engineer, Gateway Division (5/10/2022) States:

“Any of the new developments listed would require the relocation of Ameren facilities on the north side of the Jamestown Mall property. Ameren underground facilities are in easement and the relocation costs would be reimbursable.

In addition, All line extensions will be made according to the rules in effect and approved by the Missouri Public Service Commission per Ameren Missouri’s rate filing at the time of the service extension. Cost estimates for providing the requested service which may include an amount the developer must pay prior to construction, will be determined upon confirmation of the specific project requirements.”

5. AT&T:

Email Response from Ms. Tonya Wells (5/10/2022) States:

“AT&T has copper cables that currently feed Jamestown Mall. There are no fiber optic lines in the old mall property. there are fiber optic cables along Lindbergh that can be brought into the Jamestown area based on what development option is decided. There are some manholes along the perimeter of the old mall. Our infrastructure will need to be reinforced and upgraded with fiber after demolition. I can issue a project to remove the old copper cable from the existing building if that is needed soon.”

6. CHARTER / SPECTRUM:

Email Response from Mr. Kerin Miller, MBA, MA (5/16/2022) States:

“We are in good shape to serve almost anything in this area. While we don’t have any service on the grounds right now, but we serve the surrounding homes and are able to service this site’s future development.”

RESPONSES REGARDING ROAD CAPACITY:

1. MODOT

Email Response from Mr. Van Gluzman – Area Traffic Engineer, (5/5/2022) States:

“Currently there are two operating signals in front of the property: Old Jamestown and Robins Mill. The other two entrances, currently unsignalized, used to be signalized as late as 10 years ago. current roadway infrastructure could be adequate. The existing signal at Robbins Mill dates to 1994 and the one at Old Jamestown Is not that much newer and would likely need replacement.”

2. ST. LOUIS COUNTY DEPARTMENT OF TRANSPORTATION:

Email Response from Mr. Glenn Henninger, Assistant Division Manager, Planning & Programming, Division of Project Development (6/2/2022) States:

“Existing road network supported the Mall in its hay-day. We do not anticipate the need for major roadway network upgrades. However, when uses are pinned down more, a traffic study will determine locations of possible needed spot improvements.

The immediate area has also grown in residential use. Multi-modal improvements to the area roadway network should be considered, but major widening such as addition of thru driving lanes is not anticipated.”

3. BLACK-JACK FIRE DISTRICT:

Email Response from Ms. Demetria Peebles (6/1/2022) indicates that Fire Chief Corbin is on Vacation and will Respond upon his return the week of 6/6/2022.