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Chapter 1

INTRODUCTION AND OVERVIEW

Forest Park is the centerpiece of the St. Louis region. Through its diverse cultural institutions, amenities, natural features, and events, it serves and brings together St. Louisans and visitors of all ages, races, socioeconomic backgrounds, and lifestyles. Though the main goal of the Forest Park Great Streets planning process is to establish a plan for improved access and connectivity to, from, and within the park, there is a need to understand how to enhance the user experience and better align the park with development patterns in surrounding neighborhoods.
INTRODUCTION AND OVERVIEW

Forest Park is more than just a city park—it provides a backdrop for the collective identity, culture, history and diversity of the St. Louis region.

Forest Park’s 13 million annual visitors represent a remarkable cross-section of the greater St. Louis community, including residents and visitors from all walks of life, ages, and socioeconomic backgrounds. The park is, in many ways, the centerpiece of the region that truly binds the community together. Given the breadth and affordability of its service offerings, programming, and amenities, there is not a “typical” Forest Park visitor, which makes planning for its future complex.

The number of annual visitors to Forest Park rivals that of Griffith Park in Los Angeles and Golden Gate Park in San Francisco, making it one of the most visited urban parks in the United States. Much of Forest Park’s recent success can be attributed to the commendable efforts by Forest Park Forever and City of St. Louis, as their continual investment, maintenance, and program expansion has enabled the park to preserve its natural environment while keeping pace with contemporary needs. Without a doubt, Forest Park is a tremendous success story, but given its immeasurable value to the St. Louis community, there are still opportunities for enhancing and broadening the park experience.

In the context of regional economic competitiveness and the goal of attracting and retaining a talented workforce, Forest Park plays a supporting role by providing cultural institutions, family activities, recreational facilities, a pristine natural environment, and vibrant public spaces, all grounded in the unique history of the place itself. Very few communities in the United States provide such a rich amenity that can be shared and enjoyed by all. Without a doubt, Forest Park increases the marketability and competitiveness of the St. Louis region.
One of the driving purposes of the Forest Park Great Streets Plan is understanding the challenges related to accessibility to, from, and within the park. Part of this endeavor is understanding why people come to the park, how their experience could be improved, and how to better align the park with neighboring land use patterns and development.

In some ways, Forest Park has become a victim of its own success—vehicular traffic, congestion, and pedestrian access to the park from surrounding areas continue to present challenges, especially in the peak summer months with tens of thousands of visitors entering, circulating, and exiting the park on a daily basis. There is a need to better understand why people come to the park, how they get there, and how the park can be programmed to better accommodate their needs.

Forest Park is a premier regional destination, but it is also not an island unto itself—its influence extends into the adjacent neighborhoods. The marketability and value of new development in these nearby areas is enhanced by the presence of Forest Park and pedestrian access and views into the park are key contributors to real estate value. Thus, Forest Park must not only provide amenities for its direct visitors, but also complement its neighbors.

Development Strategies was commissioned by East-West Gateway Council of Governments as part of a multidisciplinary team, led by Design Workshop, to gain a better understanding of development and land use patterns on the park’s periphery as well as visitation patterns within the park to inform future strategies for better accommodating access to, within, and from the park. The purpose of this report is to support the Forest Park Great Streets planning process by documenting the existing market conditions related to 1) local demographics and neighborhoods, 2) retail and employment districts, 3) future and planned development, and 4) the park user experience and spending potential.

REPORT SUMMARY

DEMOGRAPHICS/NEIGHBORHOODS: The neighborhoods surrounding Forest Park are diverse in terms of housing value, architecture, character, and marketability. Some neighborhoods, including the Central West End, Clayton, and University City are thriving, while others are seeing property values rise, including Dogtown and Skinker-DeBaliviere. Over the last 10 to 15 years, considerable new investment has taken place in these neighborhoods, given increasing demand for authentic, historic urban neighborhoods and presence of Forest Park.

DISTRICTS: A diverse range of retail districts and clusters are found within walking distance of the park, including cafes, niche retail, neighborhood bars, upscale restaurants, and grocery stores. Two of the region’s top employers and attractors of new talent to the region, Washington University and BJC Healthcare, are located just northwest and southwest of the park, respectively. Employees, visitors, and students offer a potential market for expanded amenities and programming within and outside of the park. However, wide roadways at the park’s edge often create a physical and psychological boundaries between the park and these destinations.

DEVELOPMENT: Over the last 10 years, the Central West End has been the site of nearly all of the higher-density residential development in the region. A number of high-profile projects are planned or underway, including a 36-story residential tower at Kingshighway and Lindell Boulevard. There are limited development sites near the park, but the former Forest Park Hospital site (owned by the St. Louis Zoo) to the south and Forest Park-DeBaliviere Metrolink Station parking lot to the north will be the two most influential and critical development sites moving forward.

PARK EXPERIENCE: Approximately, 13 million visitors come to Forest Park annually, with peak attendance in the summer months representing approximately 40 percent of annual visitors. Based on the total spending potential of park users, these visitors could support nearly 150,000 square feet of retail. Given seasonal visitation patterns, an additional 286,000 square feet of retail in the park could be supported by nearby residents, students, and workers.
INTRODUCTION AND SCOPE

REGIONAL CONTEXT

ST. LOUIS COUNTY
CITY OF ST. LOUIS
DOWNTOWN CLAYTON
WASHINGTON UNIVERSITY
CENTRAL WEST END / BARNES JEWISH HOSPITAL / CORTEX
ST. LOUIS UNIVERSITY
TOWER GROVE PARK / MISSOURI BOTANICAL GARDEN
DOWNTOWN ST. LOUIS
Chapter 2

DEMOGRAPHICS / NEIGHBORHOODS

Population growth and considerable investment in many of the neighborhoods around Forest Park over the last 10 to 15 years has positively influenced, and will continue to influence, the success of the park and its anchor institutions. Though housing values vary considerably among the surrounding neighborhoods, as a whole, most areas are either thriving or emerging with a well-occupied housing stock and increasing demand for these well-located urban neighborhoods.
DEMOGRAPHICS

Despite decades-long population decline in the city of St. Louis and relatively slow regional growth, the neighborhoods surrounding Forest Park are performing very well, adding residents and growing in housing value.

Since 2000, the city of St. Louis has lost nearly 30,000 residents, decreasing in population by more than nine percent. Most of the population loss occurred from 2000 to 2010 and the city population has been relatively stable since 2010. The St. Louis region as a whole has grown by just under six percent since 2000, well below the national population growth of 15 percent.

Despite these broader trends, the areas around Forest Park represent some of the most desirable and highly-valued residential communities in the region. Since 2010, the population within one-half mile of Forest Park grew by 2.9 percent, more than double the regional average. Additionally, given the strong institutional presence of CORTEX, BJC Healthcare, and Washington University, 67 percent of residents have at least a bachelor’s degree, more than double the regional average of 33 percent. This shows that these park-adjacent communities are especially attractive to a talented workforce.

Overall, employment and population density within a half-mile of the park are higher than the citywide averages. This density is reflected in the building stock, with higher concentrations of mid- and high-rise apartment buildings, as well as by the unique mixed-use character of the surrounding neighborhoods and districts. Population density within a half-mile of the park is nearly twice that of the city, and with hundreds of new residential units coming online in the next few years, density will continue to increase.

There are nearly 40,000 employees working within a half-mile of the Forest Park representing 15 percent of the total jobs in the city (although a small portion of these jobs stretch into St. Louis County just west of Forest Park). Approximately half of these jobs are in healthcare, which tend to pay significantly higher-than-average wages.

Median housing values within a half-mile of the park are nearly twice the citywide median and are significantly higher than median values in St. Louis County and the region. Though the presence of Forest Park is not directly responsible for higher property values, it is certainly a contributing factor and greatly enhances marketability. However, the distribution of values within the half-mile area varies significantly—median housing values in the areas to the west comprising of areas of Clayton and University City and portions of Central West End to the northeast are significantly higher than the neighborhoods to the north and south.
### DEMOGRAPHICS / NEIGHBORHOODS

#### Areas within 1/2 mile of

<table>
<thead>
<tr>
<th></th>
<th>Forest Park</th>
<th>St. Louis City</th>
<th>St. Louis County</th>
<th>St. Louis MSA</th>
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</thead>
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<td>2.9%</td>
<td>-0.2%</td>
<td>0.3%</td>
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</tr>
<tr>
<td>% WITH AT LEAST A BACHELOR'S DEGREE</td>
<td>67%</td>
<td>43%</td>
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<td>EMPLOYMENT DENSTY (jobs per square mile)</td>
<td>10,600</td>
<td>4,100</td>
<td>1,400</td>
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Source: Esri, 2016
NEIGHBORHOODS

Forest Park anchors a diverse collection of neighborhoods offering distinct architectural characteristics, land uses, and socioeconomic compositions.

Neighborhoods bordering Forest Park vary significantly, though each shares close proximity to area employment centers, easy access from surrounding highways, and favorable real estate and demographic indicators relative to the city overall. Though population loss in the city of St. Louis is well-documented—and persistent—the central corridor has been the site of much of the redevelopment activity within the city over the past several decades.

The distinctive nature of these areas is immediately visible. The historic mansions of the Central West End and DeBaliviere Place are very distinct from the Dogtown bungalows of the 1920s and 1930s. Similarly, the modern apartments and offices of the Highlands stand in stark relief to the rehabilitated duplexes and four-family buildings of The Grove. This diversity is reflected equally in terms of land uses. Institutional anchors such as BJC and Washington University occupy or control large portions of the real estate east and west of Forest Park, while residential uses are predominant to the north and south. Retail is scattered in each direction, and includes a mix of walkable commercial districts and automobile-oriented strip development.

Individually addressing the neighborhoods surrounding the park highlights their unique identities while providing context to guide future land use and development strategies. Their diversity provides a snapshot of St. Louis as a whole, and contributes to Forest Park’s simultaneous roles as neighborhood park, cultural center, and tourist attraction.
CENTRAL WEST END

Despite citywide population decline of more than eight percent since 2000, the Central West End continues to thrive, growing four percent over the same period. The neighborhood is perhaps the city’s most dynamic. The campus of BJC occupies a large portion of the western edge of the neighborhood, while Euclid Avenue anchors the highly walkable concentration of restaurants, bars, and local retailers. Residential uses include a combination of upscale rentals and large single-family homes concentrated in the Central West End’s northern and eastern sections. Much of the recent development activity in the city has been located within the neighborhood, including four high-end apartment properties and several prominent first-floor retailers.

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THE GROVE

The Grove has grown incrementally—but steadily—since the 1990s, and is anchored by a thriving commercial district along Manchester Avenue between Kingshighway and Vandeventer Avenue. After significant population loss and disinvestment throughout much of the middle of the past century, redevelopment of the neighborhood was championed by a number of LGBT-friendly bars and night clubs. Additional commercial and retail users followed, and the rehabilitation of storefronts and homes in the area became increasingly visible over the past decade. Though built in large part on the grassroots urban redevelopment efforts of a number of neighborhood organizations, the neighborhood benefitted from the institutional support of the Washington University Medical Center Redevelopment Corporation.

<table>
<thead>
<tr>
<th>Population</th>
<th>Pop. Change (2010-2016)</th>
<th>Median HH Income</th>
<th>Median Housing Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>6,000</td>
<td>-0.2%</td>
<td>$40,700</td>
<td>$342,000</td>
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<table>
<thead>
<tr>
<th>Population</th>
<th>Pop. Change (2010-2016)</th>
<th>Median HH Income</th>
<th>Median Housing Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>3,100</td>
<td>7.4%</td>
<td>$31,300</td>
<td>$134,700</td>
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</tbody>
</table>
HIGHLANDS
Originally the site of the Checkerdome Arena, the area south of the park between Oakview Place and Highland Drive was redeveloped as a mixed-use campus of modern apartments, office space, and first floor retail between 2005 and 2015. Immediately to the east, the campus of St. Louis Community College Forest Park occupies much of the former Forest Park Highlands amusement park site, followed by the St. Louis Science Center and St. Louis University High School at the neighborhood’s eastern edge. The mixed institutional and commercial nature of the northern portion of the neighborhood borders a small pocket of residential development that occupies the central area that eventually transitions to industrial uses along Manchester Avenue to the south.

<table>
<thead>
<tr>
<th></th>
<th>POPULATION</th>
<th>POP. CHANGE (2010-2016)</th>
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<td>HIGHLANDS</td>
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<td>31.8%</td>
<td>$44,400</td>
<td>$147,100</td>
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DOGTOWN
Located south of the park, the area known as Dogtown consists of the three city neighborhoods of Hi-Pointe, Clayton-Tamm, and Franz Park. The neighborhood is predominantly residential and includes a large number of bungalows built in the 1920s and 1930s as well as small duplexes and apartment buildings. Local retailers, bars, and restaurants are concentrated near the intersection of Clayton and Tamm avenues, while commercial uses are located along Hampton Avenue. Residents of the area include a wide socioeconomic mix of singles, families, and long-term senior residents. Dogtown has excellent access to regional employment centers such as Clayton, the BJC campus, and Downtown St. Louis, and the affordable housing stock is particularly attractive to young families.

<table>
<thead>
<tr>
<th></th>
<th>POPULATION</th>
<th>POP. CHANGE (2010-2016)</th>
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<th>MEDIAN HOUSING VALUE</th>
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<tr>
<td>DOGTOWN</td>
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<td>$48,200</td>
<td>$144,200</td>
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</table>
DEMUN
Demun straddles the boundary between the city and county of St. Louis and is defined in large part by the presence of Washington University. Most of the institution’s 15,000 students and 14,000 staff are concentrated on the 120-acre main campus located between Skinker and Big Bend boulevards at the northern edge of the neighborhood. Other institutional uses in the area include Fontbonne University and Concordia Seminary, while commercial uses are concentrated along Clayton Road to the south. Historic, expansive, single-family homes positioned along tree-lined residential streets occupy most of the central portion of the neighborhood, while condos and apartments are concentrated near DeMun Avenue. The Delmar Loop commercial district is located near the area’s northern edge.

<table>
<thead>
<tr>
<th>11,800</th>
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<th>$467,500</th>
</tr>
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<tr>
<td>POPULATION</td>
<td>POP. CHANGE (2010-2016)</td>
<td>MEDIAN HH INCOME</td>
<td>MEDIAN HOUSING VALUE</td>
</tr>
</tbody>
</table>

SKINKER DEBALIVIERE
Skinker DeBaliviere bounds the northwest corner of the park between its namesakes of Skinker Boulevard and DeBaliviere Avenue. Non-residential uses are limited, and the Blue Line of the Metrolink system roughly bisects the neighborhoods diagonally between Forest Park Parkway in the southeast to Delmar Boulevard to the north, while Metro’s bus depot occupies more than ten acres of the neighborhood’s northeast corner. Homes are more modest than those in DeBaliviere Place, but two-story brick homes constructed in the early 1900s are most common.

<table>
<thead>
<tr>
<th>3,800</th>
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<th>$41,600</th>
<th>$248,900</th>
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<tbody>
<tr>
<td>POPULATION</td>
<td>POP. CHANGE (2010-2016)</td>
<td>MEDIAN HH INCOME</td>
<td>MEDIAN HOUSING VALUE</td>
</tr>
</tbody>
</table>
DEBALIVIERE PLACE

Forming a portion of the northern border of the park between DeBaliviere Avenue and Union Boulevard, DeBaliviere Place includes a large number of stately historic homes similar to the neighboring Central West End. Gated streets are common, and single-family residences along the landscaped boulevards of Kingsbury Place and Washington Terrace have recently sold for $700,000 or more. Several condominium buildings form the southern boundary of the neighborhood, while a small amount of retail, a private high school, and mixed commercial uses are located along the western boundary separating DeBaliviere Place from Skinker DeBaliviere.

<table>
<thead>
<tr>
<th></th>
<th>POPULATION 2016</th>
<th>POPULATION CHANGE 2010-2016</th>
<th>MEDIAN HOUSEHOLD INCOME</th>
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<tr>
<td>Central West End</td>
<td>14,800</td>
<td>2.0%</td>
<td>$40,700</td>
<td>$342,000</td>
</tr>
<tr>
<td>The Grove</td>
<td>3,100</td>
<td>7.4%</td>
<td>$31,300</td>
<td>$134,700</td>
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<td>Highlands</td>
<td>1,100</td>
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<tr>
<td>Dogtown</td>
<td>6,000</td>
<td>-0.2%</td>
<td>$48,200</td>
<td>$144,200</td>
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<tr>
<td>Demun</td>
<td>11,800</td>
<td>0.1%</td>
<td>$59,000</td>
<td>$467,500</td>
</tr>
<tr>
<td>Skinker DeBaliviere</td>
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<td>-0.9%</td>
<td>$41,600</td>
<td>$248,900</td>
</tr>
<tr>
<td>DeBaliviere Place</td>
<td>3,600</td>
<td>5.0%</td>
<td>$49,800</td>
<td>$189,800</td>
</tr>
</tbody>
</table>

Source: Esri, 2016
Chapter 3

DISTRICTS

As activity within the surrounding commercial and employment districts continue to grow, physical connections to the park are hindered by the generation of additional pedestrian and automobile traffic. Though additional activity can complicate park access, the relationship between the park and the surrounding areas is ultimately mutually beneficial, creating a network of retail, offices, and institutions within the neighborhoods, complemented by high-quality public space in the park. Ultimately, the goal of the Great Streets process is to improve the connectivity, circulation, and accessibility of the park to improve the experiences of visitors to Forest Park and nearby destinations.
DISTRICTS

INTRODUCTION

The presence of activity nodes surrounding the park can put distinct strains on the surrounding roadway infrastructure. Two of the largest employers in the region maintain their primary campuses adjacent to the park—BJC Healthcare to the east and Washington University to the west—ensuring a steady stream of commuters passing in and around the park throughout the week. At the same time, a mix of walkable commercial corridors, neighborhood retail nodes, and auto-centric strip development have grown, declined, and re-emerged over the past century, combining weekend shoppers with Forest Park visitors along surrounding streets.

There is a two-way relationship between the park and these districts, as growth on either side impacts connectivity to the opposite. During peak weekend hours, heavy traffic along Hampton Avenue, Kingshighway, and Skinker Boulevard can significantly slow accessibility to retail development in these areas. At present, parking within the park is relatively abundant, and few visitors use alternative transit modes. Although congestion can be a positive sign signaling the vitality of a neighborhood, the easy circulation of people and goods is key to maximizing the commercial potential of any district.

The park itself is a key link in the Central Corridor that stretches from Downtown St. Louis to Clayton, and it benefits from its proximity to traditional institutional anchors such as BJC, Washington University, and St. Louis Community College, as well as the burgeoning Cortex innovation district. Employees in these centers define the weekday experience around the park. Nearly 30,000 commute in and out of the areas surrounding Forest Park each day, while the institutions themselves attract an even larger number of visitors that patronize nearby businesses and travel along surrounding roadways.

We have provided a brief overview of these districts in the following chapter, highlighting the characteristics that make each unique while assessing how they interact with the park and the surrounding roadways.
RETAIL

Difficulty accessing quality retail development defines the current park user experience as pedestrian access to nearby retail districts and clusters are generally cut off by arterial roads, and rail lines.

Though nearly two million square feet of retail space is contained within a number of distinct nodes proximate to Forest Park, current access routes funnel park users toward a small handful of retail destinations. Because most visitors arrive by car, auto-centric developments along Hampton Avenue and Clayton Road are the most heavily trafficked. While better-quality, walkable commercial districts in the Delmar Loop, Central West End, and The Grove have performed well in recent years, difficulty accessing Forest Park directly from these areas creates a physical barrier between retail and park experiences. In turn, park users have very limited retail opportunities within and adjacent to the park without again leaving by car.

This character distinction—auto-centric retail uses compared to more traditional, urban, walkable neighborhood centers and districts—is useful in organizing the larger competitive retail environment. Retail development momentum to the east, and, to a lesser degree, the northwest, will impact development opportunities for key sites around the park’s periphery and interior. Finally, easing access—both pedestrian and transit—will be key to leveraging these economic opportunities.
CENTRAL WEST END

Retail in the Central West End is largely concentrated along Euclid Avenue and around Maryland Plaza. Though some local retail storefronts are located throughout the neighborhood, bars and restaurants are predominant. Current average lease rates are the highest of the areas near the park—more than $20 per square foot—and less than three percent of the current inventory of 700,000 square feet is vacant.

The highly desirable residential real estate in the neighborhood creates a built-in market of upper-middle and upper-class consumers. Upscale restaurants are common, as well as niche uses such as furniture store specializing in modern imports and a boutique pet store. The presence of the BJC campus, which includes more than 10,000 daily employees as well as patients and visitors, creates a complimentary daytime retail demand pool. The city’s only Whole Foods is located on the ground floor of the Orion apartment development, and the region’s first Shake Shack is slated to be completed in 2017 in the first floor of the newly-built Euclid.
DISTRICTS

DELMAR LOOP

The Loop commercial district stretches about 0.75 mile from Rosedale Avenue in St. Louis to Kingsland Avenue in neighboring University City. Originally the turn around point for the street car line, The Loop is one of the region’s most visible entertainment districts, and includes several concert venues as well as numerous bars and restaurants. Retailers along the corridor include a mix of boutique clothing stores, bookstores, and record stores.

The area is popular among students at nearby Washington University, while prominent venues such as The Pageant and Tivoli Theatre attract regional visitors throughout the week. Though conditions in The Loop deteriorated from the 1960s through the 1990s, targeted redevelopment efforts in the early 2000s sought to reposition the corridor as an entertainment destination. This has manifested itself most recently in the nearly-completed Loop Trolley, a two-mile street car line running between Delmar and Forest Park reminiscent of its early 1900s namesake.

<table>
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<td>AVERAGE RATE / SQ. FT.</td>
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</table>
THE GROVE

The stretch of Manchester Avenue between Kingshighway and Vandeventer Avenue forms a walkable commercial district anchoring the larger Grove neighborhood. A diverse collection of bars and restaurants lining the corridor are mixed with service-oriented commercial uses and office space occupied by community development agencies and design firms. Retail rents in the area remain relatively affordable—around $9.50 per square foot, on average—signaling additional opportunity for growth.

The Grove’s proximity to Forest Park and the Central West End is matched by its closeness to the popular South St. Louis neighborhoods of Tower Grove and Shaw. This allows the district to leverage a large retail market that captures much of the city’s limited population growth. The LGBT-friendly reputation of The Grove has become integral to its identity over the past two decades, while deliberate placemaking and marketing efforts have created a unique district with discernable character and boundaries.

266,500 RETAIL TOTAL SQ.FT.
5.1% VACANCY RATE
$9.50 AVERAGE RATE / SQ. FT.
HI-POINTE
A small neighborhood retail node along the western boundary of Dogtown includes the historic Hi-Pointe movie theater, several restaurants, and the Cheshire Hotel. The intersection of McCausland Avenue, Clayton Road, and Oakland Avenue generates significant vehicular traffic, making the area difficult to navigate for pedestrians. While the Hi-Pointe is immediately southwest of the park, Interstate 64 creates a physical boundary making direct access from one to the other essentially impossible.

DOG TOWN
Retail uses in Dogtown are centered on the intersection of Clayton and Tamm avenues about two blocks south of Interstate 64 and two blocks west of Hampton Avenue. The early 1900s brick storefronts retain much of their century-old character, and commercial spaces are fully occupied by a mix of bars, restaurants, and local services. Dogtown remained insulated from the worst periods of urban disinvestment in the city, and commercial building stock has been well-maintained for many years, supported by the stability, density, and walkability of the surrounding residential neighborhoods.

DE BALIVIERE
Retail uses along DeBaliviere Avenue vary significant in terms of quality and character. Streetfront retail facing the DeBaliviere Metrolink Station quickly turns to more auto-oriented uses moving north including a dialysis center and strip retail set back behind surface parking. Retail vacancy of seven percent and median retail lease rates of $12 per square foot are in part due to the dated design and poor construction quality in the area. However, slowly improving conditions north of the park could support future redevelopment opportunities at key sites.

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<tr>
<th>District</th>
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<th>Vacancy Rate</th>
<th>Average Rate / Sq. Ft.</th>
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<td>DE BALIVIERE</td>
<td>38,500</td>
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HIGHLANDS
Retail uses in the Highlands are located on the ground floor of the office buildings that emerged on the site in the mid-2000s. Though somewhat institutional in appearance, an eclectic mix of a coffee shop, yoga studio, and Jimmy John’s sandwich shop serve the residents of the adjacent apartment communities as well as employees of the surrounding offices and neighboring St. Louis Community College.

SKINKER STATION
A small node of mixed-use retail occupies the northeast corner of the intersection of Skinker Boulevard and Forest Park Parkway adjacent the Metrolink’s Skinker Station. The building includes the popular Kayak’s Coffee, and two small restaurants on the ground floor, with the second and third floors occupied by offices of Washington University. Though the node is only a block from Forest Park, its location to the northwest is relatively far from the park’s highest-trafficked areas, and generally not within walking distance for most park visitors.

DEMUN
A small neighborhood commercial node is located along DeMun Avenue between Northwood and Southwood avenues. Storefronts face Concordia Park—part of the Concordia Seminary campus—while the 1920s building stock is well-occupied for both commercial and residential uses. A pocket park, narrow streets with on-street parking, and abundant sidewalk seating of bars and restaurants along the two-block stretch create an attractive and walkable environment.

<table>
<thead>
<tr>
<th>RETAIL TOTAL SQ.FT.</th>
<th>VACANCY RATE</th>
<th>AVERAGE RATE / SQ. FT.</th>
</tr>
</thead>
<tbody>
<tr>
<td>6,100</td>
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</table>

<table>
<thead>
<tr>
<th>RETAIL TOTAL SQ.FT.</th>
<th>VACANCY RATE</th>
<th>AVERAGE RATE / SQ. FT.</th>
</tr>
</thead>
<tbody>
<tr>
<td>18,000</td>
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<table>
<thead>
<tr>
<th>RETAIL TOTAL SQ.FT.</th>
<th>VACANCY RATE</th>
<th>AVERAGE RATE / SQ. FT.</th>
</tr>
</thead>
<tbody>
<tr>
<td>31,000</td>
<td>N/A</td>
<td>$30.00</td>
</tr>
</tbody>
</table>
**DISTRICTS**

**CLAYTON ROAD**
Similar to Hampton Avenue, auto-oriented uses dominate the portion of Clayton Road stretching from the park’s edge to Big Bend Boulevard. The St. Mary’s Hospital complex occupies two blocks on the southern side of the route, while a large retail center anchored by Schnucks serves a diverse market including portion of Clayton, Richmond Heights, and St. Louis.

**HAMPTON AVENUE**
Forest Park’s primary gateway is defined by auto-oriented commercial development lining Hampton Avenue. Fast food, gas stations, liquor stores, and car dealerships are all present, and the six-lane roadway carries significant traffic during rush hour and weekends. Hampton Avenue’s role as a primary thoroughfare and the high acquisition costs of sites in the corridor limit redevelopment opportunities.

<table>
<thead>
<tr>
<th>District</th>
<th>Total Square Foot</th>
<th>Vacancy Rate</th>
<th>Average Rate / Sq. Ft.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central West End</td>
<td>520,100</td>
<td>2.9%</td>
<td>$26.70</td>
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<tr>
<td>Delmar Loop</td>
<td>465,500</td>
<td>3.7%</td>
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<tr>
<td>The Grove</td>
<td>266,500</td>
<td>5.1%</td>
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<tr>
<td>Hi-Pointe</td>
<td>37,300</td>
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<tr>
<td>Dogtown</td>
<td>76,200</td>
<td>3.3%</td>
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<tr>
<td>DeBaliviere</td>
<td>38,500</td>
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<td>$16.00</td>
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<td>Highlands</td>
<td>6,100</td>
<td>N/A</td>
<td>$18.50</td>
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<tr>
<td>Skinker Station</td>
<td>18,000</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Demun</td>
<td>31,000</td>
<td>N/A</td>
<td>$30.00</td>
</tr>
<tr>
<td>Clayton Road</td>
<td>330,400</td>
<td>1.5%</td>
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<tr>
<td>Hampton Avenue</td>
<td>62,200</td>
<td>N/A</td>
<td>$10.00</td>
</tr>
</tbody>
</table>

EMPLOYMENT

About 28,000 daily non-retail employees work in five distinct centers surrounding the park. This creates a large captive market for potential development along Forest Park’s periphery, and maintains vibrancy and density throughout the week.

Three of the St. Louis region’s five largest employers maintain some presence in the neighborhoods surrounding the park, including the primary employment centers for BJC Healthcare and Washington University. Often, Forest Park’s main role is a thoroughfare along the daily commute, or in the worst cases, a free parking lot. While there are inevitable restrictions upon workday schedules that limit the ability of some employees to visit the park before, after, or during the workday, facilitating access between these employment nodes and the park itself is key. Forest Park can offer a quiet mid-day respite from work, or a destination for lunch or after-hours events. Though at times underutilized, the green space of Forest Park provides indirect benefits to employers in the area that cannot be matched by suburban office parks or Downtown office buildings.
WASHINGTON UNIVERSITY IN ST. LOUIS

The 169-acre Danforth Campus of Washington University in St. Louis is the institution’s primary campus, home to the majority of the student body, and the bulk of academic programs. Washington University’s north campus is located at Rosedale Avenue and Delmar Boulevard and houses a variety of additional administrative functions.

Free public parking in Forest Park is a popular alternative to paying for on-campus parking, and a combination of students and staff utilize Lagoon Drive as a thoroughfare to campus. The easy pedestrian linkage between the western edge of the park and Washington University’s campus leads to market potential for some development types, though much of this space adjacent to the campus within the park is occupied by the Probstein Golf Course.

BARNES JEWISH CHRISTIAN HEALTHCARE (BJC)

About half of all non-retail workers in the areas surrounding the park are employed by BJC, with most immediately across Kingshighway in the BJC medical complex. Though these employees have the greatest potential to engage with the park, the nature of their work affects this ability significantly. Administrative staff could likely access new development in the eastern portions of the park during a lunch break or after working hours. Most medical positions, however—doctors, nurses, and technicians—often lack the freedom to leave facilities during working hours, or work non-traditional 12 hour shifts. Nonetheless, a large captive market of nearly 15,000 employees as well as countless patients and visitors could provide significant support for new commercial and retail uses.

Total employees
4,500
Types of employees
Education, Non-profit

Total employees
15,000
Types of employees
Healthcare, Technology
CORTEX

In 2002, Cortex was founded by a partnership of Washington University, Saint Louis University, the University of Missouri-St. Louis, and the Missouri Botanical Garden with an initial investment of $29 million. The goal was to leverage the development potential of the St. Louis region’s major higher educational, research, and health care institutions. Today, Cortex is an internationally recognized urban, mixed-use center of research, innovation, and business growth that adds both jobs and wealth to the St. Louis region. Since its inception, Cortex has completed or has under construction 1.6 million square feet of new and rehabilitated space totaling $500 million of investment, generating 3,800 new jobs in the district. Though just under a mile from Forest Park, Cortex is still very much within its sphere of influence given the linkage via Clayton Road.

ST. LOUIS COMMUNITY COLLEGE (STLCC)

St. Louis Community College Forest Park is the state’s largest provider of health technology training, offering 13 medical programs and certifications. In addition to about 1,000 faculty and staff, the Forest Park location boasts a total enrollment of just over 8,000 students.

Although students and faculty at the community college can see the park from campus, the campus is cut off from the park by Interstate 64. Students who wish to access the park from campus must travel west to Hampton or east to the pedestrian underpass near the Science Center in order to cross the highway—a significant

HIGHLANDS

The offices at the Highlands include a variety of financial, marketing, and real estate firms, while a mix of commercial and retail users occupy some first floor spaces. The western building was constructed in 2001 during the initial redevelopment phase of the site, while a second building to the east followed in 2008.

Though employees in this area are located near Forest Park’s southern boundary—particularly the Central Fields/sports fields and, to a lesser extent, the Jewel Box—lack of immediate access points funnels potential visitors towards the highly trafficked Hampton entrance via car.
Chapter 4

DEVELOPMENT TRENDS

The future of Forest Park and the adjacent communities are very much linked—Central West End continues to attract new investment and higher-density development, while redevelopment efforts along DeBaliviere Avenue and Delmar Boulevard could potentially create a new front door to the park. Though disparities in income persist in adjacent communities, as a whole, these areas still represent some of the most desirable neighborhoods in the region and should continue to flourish moving forward.
DEVELOPMENT TRENDS

NEIGHBORHOOD TRENDS

The St. Louis region has recently experienced a significant uptick in multi-family construction, much of which has occurred within the neighborhoods proximate to the park. The region is projected to continue to see increasing mixed-use, urban development with many more projects currently in the pipeline. Additionally, key institutions nearby have undertaken large-scale capital improvement projects.

According to Marcus and Millichap, the St. Louis region added about 1,600 new apartment units in 2016, with an additional 2,500 units scheduled for completion this year. The city has captured a significant share of this development, issuing permits for nearly 1,000 multi-family units last year, a ten-year high. Specifically, five major apartment complexes, totaling 563 units, are under current construction, while the 217-unit Citizen Park in the Central West End was also recently completed.

Notably, several “premier” projects have emerged, which include unique design premiums and/or high-end first floor retail tenants. Properties such as One Hundred (100 North Kingshighway) will profoundly alter the surrounding built environment, introducing a combination of height and modern architectural elements that are currently absent from the market, while The Orion and The Euclid have added premium retail tenants such as Whole Foods and Shake Shack. Proximity to the park is undoubtedly a key amenity for these developments, which are able to achieve residential rents of more than $2.50 per square foot—well above the market average. Forest Park is central to these neighborhoods’ marketability, and essentially all new multifamily construction in the city over the past several years has occurred within a mile of its boundaries.

KEY DEVELOPMENT SITES

St. Luke’s Hospital Site
Though several proposals have been made, the most visible redevelopment effort at the former St. Luke’s Hospital site has been the “Delmar Divine”, a mixed-use development that will include 180,000 square feet of office space for area non-profits as well as 160 apartments and ground floor retail space. The $90 million proposal is a joint effort between Clayco, Washington University, and former Build-A-Bear CEO Maxine Clark.

Forest Park-DeBaliviere MetroLink Site
As one of the most heavily-utilized stations within the MetroLink system, the existing Metro-owned parking lot and adjacent properties at the Forest Park-DeBaliviere station represent one of the region’s best opportunities for Transit Oriented Development (TOD). The six parcels vary in size, though all are less than two acres and most are less than one acre. Two parcels are owned by Metro and are improved with surface parking and a bus drop-off circle, while the four remaining parcels are under separate private ownership.

Former Forest Park Hospital Site
The St. Louis Zoo acquired the 13.5-acre site of the former Forest Park Hospital in 2012 with plans to expand parking and establish a “South Campus” including an educational center, research and laboratory space, exhibit area, and commercial space. A seven-story parking structure was retained, while remaining hospital buildings were demolished.

Drury Development Site
Drury Development Corporation acquired 15 residential parcels along the eastern edge of Kingshighway near the Interstate 64 interchange in 2014, and is now seeking to demolish the corner building along Oakland Avenue. Though details are not confirmed, this is likely the most recent step in long-standing efforts to develop a new hotel at the site. Various iterations of the project have emerged over the past decade, with the original pre-recession design including two 16-story hotel buildings housing 690 guest rooms.
RECENT/PLANNED MULTI-FAMILY DEVELOPMENT

West End City Apartments is a modern 82-unit expansion to the historic Congress, Senate, and Westmoreland apartments located along Union Boulevard near Forest Park Parkway. Common area amenities were expanded, including a pool and fitness center.

100 N. Kingshighway is a planned 36-story, 305-unit apartment tower to be located immediately east of the Park. Designed by Studio Gang, the building will be the tallest in the Central West End and its scalloped design is a distinct, modern departure from nearby structures.

Citizen Park developed by Opus, will be a 12-story building with 217 studio, one, and two-bedroom apartments, as well as two floors of penthouse apartments, and ground-level retail.

The Orion is a recently-completed seven-story building that includes 177 one-, two-, and three-bedroom apartments and a Whole Foods Market on the ground floor.

The Euclid is located directly across from The Orion, and is being developed by Koman Group. When completed in summer 2017, the project will include 72 apartments over 12,000 square feet of office space and street level retail (including St. Louis’ first Shake Shack location).

Aventura at Forest Park was completed in late 2013 offering 150 units and marketed heavily to medical professionals and students at the nearby Washington University School of Medicine. Its low-rise suburban design is atypical given its urban location near the northern edge of The Grove.

Gateway Lofts will add 56 units on the southwest corner of Manchester and Newstead Avenues in the western edge of the Grove, directly across from the Urban Chestnut brewery.

Encore at Forest Park is the third and final residential phase of The Highlands development along the Highway 40 corridor. It will include 246 one-, two-, and three-bedroom units and is located within a larger mixed-use development including a hotel, retail, and office space.

RECENT/PLANNED CAPITAL IMPROVEMENTS

Washington University Medical Center
The long-term Campus Renewal Project is a $1 billion renovation and construction investment targeting all three of the center’s component institutions. This includes significant expansion to current patient service areas—including a new inpatient tower and clinical expansion for the cancer center—as well as the opening of a new administrative office building.

Shriner’s Hospital
The new $50 million, 90,000 square foot Shriner’s Hospital opened in mid-2015 and overlooks Interstate 64 near Clayton and Newstead avenues. The three-story facility includes 12 inpatient beds as well as guest rooms for families.

Washington University Danforth Campus East End Expansion
Focusing on portions of the Danforth Campus east of Brookings Halls, planned expansion efforts will include three new academic buildings, two new multi-use facilities, an underground parking garage, and expanded green space. Surface parking lots currently occupy much of the expansion area, which faces Skinker Boulevard near the park’s northwest corner.
DEVELOPMENT TRENDS

RECENT AND PLANNED DEVELOPMENT

KEY DEVELOPMENT SITES
1. FORMER ST. LUKE’S HOSPITAL
2. FOREST PARK-DEBALIVIERE METROLINK STATION AREA
3. FORMER FOREST PARK HOSPITAL
4. DRURY DEVELOPMENT SITE

MULTI-FAMILY DEVELOPMENT
5. WEST END CITY APARTMENTS 82 units
6. 100 N. KINGSHIGHWAY 306 units
7. CITIZEN PARK 217 units
8. THE ORION 177 units
9. THE EUCLID 72 units
10. AVENTURA AT FOREST PARK 150 units
11. GATEWAY LOFTS 56 units
12. ENCORE AT FOREST PARK 246 units

CAPITAL IMPROVEMENT/EXPANSION
13. WASHINGTON UNIVERSITY MEDICAL CENTER
14. SHRINER’S CHILDREN’S HOSPITAL
15. WASHINGTON UNIVERSITY DANFORTH CAMPUS EAST END EXPANSION
Chapter 5

PARK EXPERIENCE

Visitors to Forest Park in many ways represent a cross-section of the city, county, and regional population. People of all backgrounds come to the park for a variety of reasons from sports tournaments to festivals to art openings to enjoying family amenities like the St. Louis Zoo or St. Louis Science Center. There is no single “market” for Forest Park and planning for the future needs of the park requires a deeper understanding of the park users and their experience. In other words, who are they, where are they coming from, and why do they come to the park? Given Forest Park’s prominence as a regional destination and amenity, there is also a need to understand why certain segments of the regional population do not visit the park and identify barriers related to accessibility, gaps in programming, services, and amenities in the park, or simply lack of interest.
PARK EXPERIENCE

INTRODUCTION

In order to plan for Forest Park’s future, there is a need to gain a better understanding of its current users and their experience. The programming of the park is extensive, attracting a wide range of users, but in the spirit of the 1995 Forest Park Master Plan’s call for “a total park experience,” the purpose of the following analysis is to understand visitation patterns to the park to inform how the experience could be potentially enhanced or expanded. Accessibility, connectivity, and mobility to, from, and within the park is the driving force behind the Forest Park Great Streets planning process, but the following section aims to identify types of users and their spending patterns to identify market potential for expanding retail, concessions, and other commercial activity within the park.

This chapter is divided into four distinct study areas: 1) the user, 2) their experience, 3) their spending potential, and 4) the amount of square footage of retail that this potential spending could support. Understanding how the estimated 13 million visitors spend their money, or could spend their money if the right offerings were provided, is dependent on the type of user and purpose of visit. Without survey data on specific spending patterns, it is assumed that, on average, spending preferences are linked to activity and purpose of visit. For example, someone coming to a performance at The Muny will have different spending patterns and potential than a family visiting the St. Louis Zoo. The following analysis makes reasonable assumptions based on spending, where data is available, and general regional trends, although more comprehensive data gathering is encouraged to inform future planning efforts.
Given its breadth of service offerings and programming, the estimated 13 million annual visitors to Forest Park include a wide range of demographic and socioeconomic backgrounds. Individuals, couples, friends, teammates, colleagues, and families come for a variety of reasons. Though some of the partner institutions track visitation patterns, there is little data available to help inform the demographic profile of park users; however, based on the attractions and activities within the park, assumptions can be made regarding “user segments” and their spending patterns. The following user segments are not intended to be mutually exclusive—they should be viewed as general visitor categories as a way to inform future planning efforts and understand demand for certain service offerings. It is recognized that visitors to the park may (and are encouraged to) make multiple stops, and thus, transcending many of these categories.

Previous zip code analyses also informed these user profiles. Maps of patrons and users of the park institutions and partners are available in the Appendix based on 2014 data, which represents the most current data available.

**ARcS & CuLTuRAl ATTENDEES**

Based on zip code data of St. Louis Art Museum members and attendees to The Muny, the largest concentrations of arts supporters in the region come from the Central Corridor and more affluent areas of West St. Louis County. Though arts patrons can include a wide range of age groups and demographic profiles, in general, patrons tend to be older with higher levels of educational attainment and household income. These groups also tend to spend more per outing than other Forest Park users.

**FRIENDS, FaMILIES & YOUTH**

The St. Louis Zoo, St. Louis Science Centers, and Missouri History Museum are three of the top visitor destinations in the St. Louis region, and based on zip code analysis, visitors cover a much broader portion of the region. These attractions are also a significant draw for out-of-town visitors. Because of the free admission to these institutions, they are a primary draw for families and youth from a wide-range of socioeconomic backgrounds given their affordability.

Live Theater Attendees
Museum Patrons
Art Opening Attendees

Zoo Patrons
Science Center Patrons
Missouri History Museum Patrons
Students and Youth
SPECIAL EVENT & FESTIVAL ATTENDEES

Special event and festival attendees represent one of the most diverse groups of Forest Park visitors. Events include parades, festivals, road races, concerts, and fireworks displays that attract individuals, couples, groups, and families of all ages. Understanding visitation patterns and user groups is dependent on the type of event. Some events such as the Great St Louis Balloon Glow and St. Patricks’ Day parade attract a wide range of age groups and families, while events like LouFest tend to attract Millennials and youth. There is little to no data available to inform visitation patterns of these attendees beyond aggregate event estimates.

SPORTS PARTICIPANTS & ACTIVE LIFESTYLES

Opportunities for team sports and exercise take up the largest footprint in Forest Park, including golf courses, tennis courts, ball fields, and paths and trails. Based on aggregate attendance estimates, those participating in team sports and active lifestyles are likely the largest user group in the park. This group primarily consists of adult users, but the ball fields and tennis courts also have youth league participation. Though zip code data is unavailable for these groups, it can be assumed that the majority live within a reasonable distance of the park and likely use the park at a higher frequency than other groups.

THE RECREATION & RELAXATION CROWD

Essentially, “all other users” of the park fall into this category, which consists of picnickers, strollers, hikers, and people who want to sit back and relax. Also included in this group are people who come to the park for dining at the Boathouse or seasonal recreational activities like the Steinberg Skating Rink. This group also includes a very wide range of age groups and socioeconomic backgrounds.

Individuals/Couples
Groups
Families
Youth

Golfers
Tennis Players
Sports Teams
Runners
Cyclists

Picnickers
Strollers
Sightseers
Diners
Hikers/Nature Enthusiasts
Experience

Forest Park attracts approximately 13 million visitors annually. The 10 anchor institutions and partners in Forest Park track attendance, which represents just under six million of these visitors. City of St Louis oversees permitting of park events and festivals, which attracted an estimated 941,000 visitors in 2016. Understanding the visitation patterns of the remaining six million visitors is more challenging without specific survey data. Historically, total visitation counts have been based on traffic volume and not necessary counts of joggers, cyclists, and picnickers. However, given the lack of alternative sources, the following breakdown of visitors per “experience” is based on the best available data and reasonable assumptions.

Arts & Cultural Institutions

The St. Louis Art Museum (SLAM) is one of the region’s premiere cultural attractions and the $130 million expansion of its East Building in 2013 (aka “Modern Wing”) has led to a recent increase in annual attendance. This expansion represented one of the largest single capital investments at Forest Park institution in the park’s history. The Muny is a 11,000-seat amphitheater with performances running from late-May to early-July.

Family & Educational Attractions

Over one-third of the visitors to Forest Park come for its family and educational attractions, including the St. Louis Zoo, St. Louis Science Center, and Missouri History Museum. The St. Louis Zoo is often ranked as the top visitor attraction in the region and is one of the only zoos in the country with free admission.

831,000 Visitors

St. Louis Art Museum (476,000)
The MUNY (355,000)

4,641,000 Visitors

St. Louis Zoo (3,170,000)
St. Louis Science Center (974,000)
Missouri History Museum (497,000)
PARK EXPERIENCE

SPECIAL EVENT & FESTIVALS

In addition to events hosted by the anchor institutions, there are dozens of events in Forest Park throughout the year attracting hundreds of thousands of visitors. These events include road races and walks, music festivals and concerts, movies, parades, and sports that are administered by the city of St. Louis Department of Parks, Recreation, and Forestry, though the events themselves are typically managed by a third-party. In 2016, these events and festivals attracted just under 900,000 attendees. Approximately one-third of these visitors attended two multi-day events that included the Balloon Glow and Great St. Louis Balloon Race (180,000 attendees) and Fair St. Louis and Fireworks (150,000 attendees).

ACTIVE RECREATIONAL ACTIVITIES & SPORTS

It is assumed that of the more than six million estimated visitors not included in the visitor counts of the anchor institutions/partners or events/festivals, approximately two-thirds engage in physical activity including team sports such as softball, baseball, cross country, and rugby as well as running, rollerblading or cycling. When including the visitor counts at Probstin Golf Course, Highlands Golf-Tennis, and Dwight Davis Tennis Center, there is an estimated 4,304,000 visitors that engage in active recreation. It is assumed that peak attendance is seasonal with a higher proportion of visitors in spring, summer, and early autumn.

PASSIVE RECREATIONAL ACTIVITIES

Of the more than six million estimated visitors not included in the visitor counts of the anchor institutions/partners or events/festivals, it is assumed that approximately one-third engage in passive recreational activities such as hiking, birdwatching, strolling, and picnicking. Additionally, the seasonal recreational visitors to the Boathouse (134,000) and Steinberg Skating Rink (70,000) brings the total estimated number of passive recreational visitors to more than 2,281,000, or just under 18 percent of all visitors to the park. Similar to active recreational visitors, those engaged in passive recreational activities have peak attendance in the spring, summer, and early autumn.

941,000 VISITORS
Great Forest Park Balloon Race (180,000)
Fair St. Louis/Fireworks (150,000)
St. Louis World’s Fare (90,000)
St. Louis Earth Day (70,000)

4,304,000 VISITORS
Golf/Tennis (150,000)
Sports, Running, Cycling (4,154,000)*
*DS estimate

2,281,000 VISITORS
Boathouse (134,000)
Steinberg Skating Rink (70,000)
Picnics, walking, sightseeing (2,077,000)*
*DS estimate
Forest Park has a number of food, beverage, and other retail amenities throughout the park, primarily located at the partner institutions. Revenues generated by food, beverage, and concessions sales are generally used to support operations, and thus, any expansion of retail amenities must ensure that it complements existing offerings (as opposed to pulling spending from elsewhere). This is especially important since general admission to the primary institutions is free and on-site concession revenue is a major contributor to operations. For example, in 2015, over 60 percent of operating revenues at the St. Louis Zoo were from food, beverage, gift shop, and other concessions.

The following analysis is intended to quantify the amount of spending potential for each of the users/experiences at the park. This does not represent what is actually spent, but what average visitors would be willing to spend during their visit to Forest Park if the right type of retail amenity was available. To the extent possible, the following assumptions are based on previous studies and reported concessions spending data; however, given data limitations, some assumptions should be considered reasonable and conservative based on qualitative information.

**SPENDING POTENTIAL**

**ARTS & CULTURAL INSTITUTIONS**

Based on numerous studies and attendance pattern analysis, arts patrons tend to come from more affluent households, and thus, have greater spending potential per outing. According to a study from the Americans for the Arts, arts patrons in St. Louis spend, on average, roughly $16.75 per person on food, beverage, and concessions, per outing, which includes performances, events, and openings. Most of the spending is on dining before or after an event and patrons tend to prefer quality, experience, and niche over affordability.

**Per person spending: $16.75**

**FAMILY & EDUCATIONAL ATTRACTIONS**

Per person spending on food, beverage, and concessions at the anchor family and educational institutions varies: St. Louis Zoo ($4.50 per person), St. Louis Science Center ($0.40), and Missouri History Museum (no data). Since these represent affordable family attractions, the spending potential is lower for these patrons. Additionally, on-site spending for the zoo is critical to support operations, so any expanded concessions would not be targeted to these user groups. However, to support this analysis, it is assumed that the average person spends $3.00 per visit, not including parking and other spending on special exhibits.

**Per person spending: $3.00**
PARK EXPERIENCE

SPECIAL EVENT & FESTIVALS

Since special events tend to be operated through third-party companies and organizations, concessions spending data is not available; however, it can be assumed that concessions spending is contained within the event itself and the revenues are used to support marketing, promoting, operations, and other aspects of the event. In some cases, proceeds are directed towards charitable organizations or derived for other fundraising efforts. With this in mind, it is assumed that the spending potential for event and festival goers is generally zero.

ACTIVE RECREATIONAL ACTIVITIES & SPORTS

Spending patterns vary depending on activity. Golf typically generates the most retail spending of sports participants, since food and beverage tend to be associated with the outing. Concessions spending at the Probstein Golf Course and Highlands Golf and Tennis Center average roughly $19.00 per person, although this average is somewhat skewed by special events and weddings, which tend to generate higher per person spending. Sports teams, joggers, cyclists, and other active creational participants generally do not spend money per outing, but it would be reasonable to assume that, on average, they would be willing to spend $2.00 per person on water, coffee, or other concessions, if available.

N/A

Golf/Tennis: $15.00
Other active recreation: $2.00

Boathouse: $15.00
Steinberg: $3.00
Other passive recreation: $1.00

PASSIVE RECREATIONAL ACTIVITIES

Generally, those attending picnics bring their food, although they still offer some limited spending potential. The Boathouse averages roughly $15 per person in food and beverage sales, although with 134,000 annual attendees, this only represents approximately one percent of all Forest Park visitors. At the same time, the Boathouse also represents the spending potential of patrons to a destination and experiential dining amenity in the park. All other passive users of the park, primarily people walking or sightseeing, offer some limited spending potential estimated at $1.00 per person per visit.
Based on visitation patterns and average spending assumptions, Forest Park visitors provide just over approximately $44 million in spending potential annually. Some of this spending is currently being captured by existing food, beverage, and concessions options within the park; however, there is also leakage, in which visitors must spend money outside of the park since certain service offerings are unavailable. Therefore, the following analysis is intended to quantify how much total square footage of space could be supported if it were provided inside of the park; however, specific types of retail and programming would be dependent on market segment and user preferences.

Based on industry standards, retail establishments typically require at least $300 of annual spending per square foot of space to support operations and profitability; therefore, Forest Park visitors could support just under 150,000 square feet of retail space. Of this 150,000 square feet of demand, certain retail types would be better positioned depending on user segment. Again, this analysis does not imply that adding 150,000 square feet of retail space would be appropriate, but that there is enough purchasing power to support this space.

**ARTS & CULTURAL INSTITUTIONS**

Arts and cultural attendees could support approximately 46,000 square feet of retail. These attendees typically have a higher willingness to pay for food and beverage and have preferences for quality and uniqueness. Dining and retail options should be experiential and associated with the outing as opposed to convenience. Given their purchasing power, there is considerable opportunity for retail expansion targeting these visitors.

<table>
<thead>
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<th>Spending Potential: $13.9 million</th>
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</thead>
<tbody>
<tr>
<td>Space Support: 46,000 SF</td>
</tr>
<tr>
<td>Retail preferences: Quality, niche, experiential</td>
</tr>
</tbody>
</table>

**FAMILY & EDUCATIONAL ATTRACTIONS**

The spending potential for family visits are primarily captured by the St. Louis Zoo, St. Louis Science Center, and Missouri History Museum generally consisting of fast food concessions and gift shop purchases. Given these importance of concession revenues to support operations, especially for the St. Louis Zoo, any future retail expansion in Forest Park should not directly compete and existing on-site concessions amenities.

<table>
<thead>
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<th>Spending Potential: $13.9 million</th>
</tr>
</thead>
<tbody>
<tr>
<td>Space Support: 46,000 SF</td>
</tr>
<tr>
<td>Retail preferences: Affordable, familiar</td>
</tr>
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</table>
PARK EXPERIENCE

SPECIAL EVENT & FESTIVALS

Though event and festival attendees spend considerable amounts on food and beverage during their visit, this spending is typically contained within the event itself and does not lend itself to supporting additional retail beyond event grounds. Though some events, such as races, may offer some retail support, the infrequency and temporary nature of these events foes not lend to supporting permanent retail.

ACTIVE RECREATIONAL ACTIVITIES & SPORTS

Though spending on concessions and retail for these visitors is relatively low on a per person basis, in aggregate, there is considerable purchasing power for fast, simple, and functional amenities such as vending machines, snack bars, or beverages, but also apparel and gear for supporting sports activities such as t-shirts, yoga mats, headphones, or sunscreen. Given the health conscious nature of these visitors, there are potential opportunities for supporting healthy lifestyles, including fresh food, granola bars, or juice.

PASSIVE RECREATIONAL ACTIVITIES

This group include a wide range of users with different needs and preferences. Generally, picnickers bring their own food and beverage, but there could be opportunities to supplement with additional packaged food options. Additionally, those seasonal visitors to the Boathouse have more purchasing power, since this is a food and beverage destination. Overall, the passive recreational visitors could support approximately 15,000 square feet of retail space.

<table>
<thead>
<tr>
<th>Spending Potential</th>
<th>Space Support</th>
<th>Retail preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>Varies by event</td>
</tr>
<tr>
<td>$10.6 million</td>
<td>35,000 SF</td>
<td>Fast, simple, functional</td>
</tr>
<tr>
<td>$4.3 million</td>
<td>14,000 SF</td>
<td>Fast, simple, functional</td>
</tr>
</tbody>
</table>
RETAIL AND CONCESSIONS

In order to inform future planning efforts related to retail expansion in Forest Park, it is important to recognize that certain portions of the park are currently well-served by retail amenities and concessions. In many cases, however, the on-site amenities directly serve patrons of the institution and have less curb appeal or are less welcoming to a broader universe of park visitors. For example, retail and concessions amenities at the St. Louis Zoo are primarily positioned for zoo visitors. While the anchor institutions and park partners would certainly support expanded foot traffic and patronage of their retail, concessions, and restaurants, access and parking, in many ways, is a primary deterrent.

In general, the Boathouse and Forest Perk Café at the Forest Park Visitor Center are the only amenities that cater towards a general audience, from visitors to the anchor institutions to those coming for active and passive recreational activities; however, visitors to the Boathouse represent only one percent of total Forest Park visitors annually implying that there are opportunities to better position existing retail at the park or expand service offerings to capture a larger share of visitor spending.

Since on-site spending at each of the existing food, beverage, and concessions offerings at the anchor institutions or park partners directly supports their operations, it is critical that any expansion of future retail offerings 1) expands offerings within the park, 2) captures a larger share of demand, and 3) does not directly complete with existing concessions offerings.
EXISTING CONCESSIONS

1. ST. LOUIS ZOO
VARIOUS CONCESSIONS

2. ST. LOUIS ART MUSEUM
PANORAMA AND CAFE

3. PROBSTEIN GOLF COURSE
RUTHIE’S BAR AND GRILL

4. MISSOURI HISTORY MUSEUM
BIXBY’S

5. VISITOR’S CENTER
FOREST PARK CAFE

6. BOATHOUSE FOREST PARK

7. SOUTH COMFORT STATION
CONCESSION (UNDER CONSTRUCTION)

8. ST. LOUIS SCIENCE CENTER
VARIOUS CONCESSIONS

9. HIGHLANDS GOLF & TENNIS
KEAGANS’S RESTAURANT

SEASONAL/UNDERUTILIZED STRUCTURES

10. COMFORT STATION

11. CABANNE HOUSE

12. FOREST PARK HATCHERY

13. STEINBERG SKATING RINK

DEVELOPMENT STRATEGIES
SEASONAL ATTENDANCE

Based on monthly attendance reporting from the park partners and institutions and special event and festival schedule from the city of St. Louis, it is assumed that active and passive recreational visitors follow similar attendance patterns with the highest proportion of visitors in the summer months. Based on these assumptions, approximately 40 percent of all Forest park visitors come from June through August. In June and July, the St. Louis Zoo alone attracts nearly a million visitors. Overall, July is the busiest month of the year with more than two million total visitors.
SPATIAL ATTENDANCE

Mapping the annual attendance of the park partners and anchor institutions shows which portions of Forest Park are “weighted” putting a strain on road networks and circulation patterns. The southwest and central portions of the park have the highest concentrations of visitors, whereas the northeast section has less activity given the lack of anchor institution and most of the visitors to the southeast section are on the south side of Interstate 64 at the St. Louis Science Center or seasonal during winter at the Steinberg Skating Rink.

There is no data available to inform how active and passive recreational visitors are distributed throughout the park. The paths and trails on the park periphery tend to carry the most foot and bicycle traffic, and the Central Fields, Aviation Fields, and Softball Fields tend to have the most team sport activity, whose participants likely put vehicular pressure on the Hampton Avenue entrance.
PEAK USAGE AND SECONDARY SUPPORT

In order for current and future retail businesses to remain competitive throughout the entire year, there is a need to draw demand from secondary sources of support, which include nearby residents, workers, and students. It can be assumed that a large proportion of their current retail spending occurs in nearby retail districts, including The Loop and Central West End; however, these groups provide a considerable amount of potential buying power that could support additional retail amenities in the park, if strategically positioned. Given the lack of reliable data, these estimates should be considered understated since they do not include the spending potential of patients and visitors to the BJC campus.

PARK VISITORS

As presented in the Seasonal Attendance analysis, estimated visitation to Forest Park varies significantly throughout the year with peak attendance in July with more than two million estimated visitors. Conversely, attendance during winter months averages under 500,000 per month. The estimated retail support of just under 140,000 square feet annually by Forest Park visitors assumes equal distribution of spending throughout the year; therefore, it should be recognized that some retail establishments may struggle with sales during the slower winter season and ramp up during summer. For example, based on food and beverage sales at the Boathouse, more than half of annual revenues were generated from May through August and revenues during the month of May were more than six times revenues generated in the month of January.

RESIDENTS

There are approximately 15,000 residents living within a one-half mile of Forest Park. Though pedestrian access to the park varies depending on neighborhood, the following analysis demonstrates potential buying power of these residents assuming they could easily access the park and there were attractive retail options that satisfied consumer preferences. Based on consumer spending data from Esri, these residents in aggregate spend approximately $33.6 million annually at food and beverage establishment, which based on an estimated $300 of retail spending per square foot, results in an estimated 112,000 square feet of retail.

EMPLOYEES

The daily spending by the local workforce also presents an opportunity to include strategically positioned retail tenants serving this demand segment. In this context, strategically positioned retail includes both retail offerings and location within the park. According to Esri, there are approximately 12,000 jobs within a half-mile of the park. Assuming average weekly spending of $20 on lunch, coffee, and other daily provisions, this results in the annual spending of $12.4 million by the local workforce, which supports approximately 41,000 square feet.

STUDENTS

According to a survey from College Board, college students spend an average of $2,100 annually on “other expenses” which excludes tuition, room and board, books and supplies, and transportation costs. In other words, this spending generally includes dining and other retail expenses. Based on this data, the 14,000 students at Washington University and estimated 5,000 full-time St. Louis Community College Forest Park spend an estimated $40 million annually on other retail expenses, which supports approximately 133,000 square feet.
## CONCLUSIONS: RETAIL SUPPORT

<table>
<thead>
<tr>
<th></th>
<th>PRIMARY SUPPORT</th>
<th>SECONDARY SUPPORT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PARK VISITORS</strong></td>
<td>13 Million Forest Park Visitors</td>
<td>142,000 Square Feet</td>
</tr>
<tr>
<td><strong>RESIDENTS</strong></td>
<td>15,000 Residents within 1/2 mile</td>
<td>112,000 Square Feet</td>
</tr>
<tr>
<td><strong>EMPLOYEES</strong></td>
<td>12,000 within 1/2 mile</td>
<td>41,000 Square Feet</td>
</tr>
<tr>
<td><strong>STUDENTS</strong></td>
<td>19,000 within 1/2 mile</td>
<td>133,000 Square Feet</td>
</tr>
</tbody>
</table>
ACKNOWLEDGMENTS

Matthew Wetli, Project Director
Brian Licari, Project Manager
Jake Narup, Junior Project Manager
Megan Hinrichsen, Art Director
Jill Mead, GIS and Spatial Analyst
Andrew Stanislav, Market Analyst and Graphic Designer
APPENDIX

- FOREST PARK INSTITUTION MEMBERS BY ZIP CODE (2014)
- NEIGHBORHOODS MAP & SUMMARY DATA
- SURROUNDING RETAIL DISTRICTS MAP & SUMMARY DATA
- SURROUNDING EMPLOYMENT DISTRICTS MAP & SUMMARY DATA
- DEMOGRAPHIC MAPS
FOREST PARK INSTITUTION MEMBERS BY ZIP CODE (2014)

ST. LOUIS ART MUSEUM

SCIENCE CENTER

ST. LOUIS ZOO

THE MUNY

HISTORY MUSEUM

DATA SOURCE

These maps show the home zip codes each institution’s members. Forest Park Forever collected this data in 2014 from records maintained by each organization. Overall, Zoo members are the most dispersed throughout the region, while History Museum members are the most concentrated.
## NEIGHBORHOODS

<table>
<thead>
<tr>
<th>Neighborhood</th>
<th>Population</th>
<th>Population Change 2010-2016</th>
<th>Median Household Income</th>
<th>Median Housing Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central West End</td>
<td>14,800</td>
<td>2.0%</td>
<td>$40,700</td>
<td>$342,000</td>
</tr>
<tr>
<td>The Grove</td>
<td>3,100</td>
<td>7.4%</td>
<td>$31,300</td>
<td>$134,700</td>
</tr>
<tr>
<td>Highlands</td>
<td>1,100</td>
<td>31.8%</td>
<td>$44,400</td>
<td>$147,100</td>
</tr>
<tr>
<td>Dogtown</td>
<td>6,000</td>
<td>-0.2%</td>
<td>$48,200</td>
<td>$144,200</td>
</tr>
<tr>
<td>Demun</td>
<td>11,800</td>
<td>0.1%</td>
<td>$59,000</td>
<td>$467,500</td>
</tr>
<tr>
<td>Skinker-DeBaliviere</td>
<td>3,800</td>
<td>-0.9%</td>
<td>$41,600</td>
<td>$248,900</td>
</tr>
<tr>
<td>DeBaliviere Place</td>
<td>3,600</td>
<td>5.0%</td>
<td>$49,800</td>
<td>$189,800</td>
</tr>
</tbody>
</table>

Source: Esri, 2016
## SURROUNDING RETAIL DISTRICTS

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Delmar Loop</td>
<td>465,500</td>
<td>3.7%</td>
<td>$30.00</td>
</tr>
<tr>
<td>2</td>
<td>Skinker Station</td>
<td>18,000</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>3</td>
<td>Demun</td>
<td>31,000</td>
<td>N/A</td>
<td>$30.00</td>
</tr>
<tr>
<td>4</td>
<td>Clayton Road</td>
<td>330,400</td>
<td>1.5%</td>
<td>$30.00</td>
</tr>
<tr>
<td>5</td>
<td>Hi-Pointe</td>
<td>37,300</td>
<td>N/A</td>
<td>$19.00</td>
</tr>
<tr>
<td>6</td>
<td>Dogtown</td>
<td>76,200</td>
<td>3.3%</td>
<td>$14.40</td>
</tr>
<tr>
<td>7</td>
<td>Hampton Avenue</td>
<td>62,200</td>
<td>N/A</td>
<td>$10.00</td>
</tr>
<tr>
<td>8</td>
<td>Highlands</td>
<td>6,100</td>
<td>N/A</td>
<td>$18.50</td>
</tr>
<tr>
<td>9</td>
<td>The Grove</td>
<td>266,500</td>
<td>5.1%</td>
<td>$9.50</td>
</tr>
<tr>
<td>10</td>
<td>Central West End</td>
<td>520,100</td>
<td>2.9%</td>
<td>$26.70</td>
</tr>
<tr>
<td>11</td>
<td>DeBaliviere</td>
<td>38,500</td>
<td>6.5%</td>
<td>$16.00</td>
</tr>
</tbody>
</table>

Source: CoStar, 2016
<table>
<thead>
<tr>
<th>EMPLOYER</th>
<th>TOTAL EMPLOYEES</th>
<th>TYPE OF EMPLOYEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Washington University North Campus</td>
<td>300</td>
<td>Administration</td>
</tr>
<tr>
<td>2 Washington University Danforth Campus</td>
<td>4,200</td>
<td>Education, Non-profit</td>
</tr>
<tr>
<td>3 St. Mary’s Hospital</td>
<td>2,100</td>
<td>Healthcare</td>
</tr>
<tr>
<td>4 Highlands</td>
<td>800</td>
<td>Professional Services</td>
</tr>
<tr>
<td>6 St. Louis Community College</td>
<td>1,000</td>
<td>Education</td>
</tr>
<tr>
<td>7 Barnes Jewish Hospital</td>
<td>15,000</td>
<td>Healthcare, Technology</td>
</tr>
<tr>
<td>8 Cortex</td>
<td>3,800</td>
<td>Technology, Healthcare, Startups</td>
</tr>
</tbody>
</table>

Source: Development Strategies, 2016
POPULATION DENSITY (2010)
_U.S. Census, 2010_

The densest population concentrations are found to the north and east of
the park, particularly along DeBaliviere, in the apartments of DeBaliviere
Place, and in the Central West End—areas where apartments
predominate. The least dense area near the park is the industrial area of
Kings Oak, to the south and east of the park.

CHANGE IN POPULATION 2000-2016
_ESRI, 2016_

Around the park, the areas of greatest population growth include the
Central West End (the site of a handful of new large multifamily projects)
and the Cheltenham neighborhood (site of the Highlands development).
Other areas of population growth include parts of Clayton to the west and
the West End and Visitation Park to the north.
EMPLOYMENT DENSITY (2015)  
*ESRI, 2016*

The most prominent center of employment activity is by far the Central West End-BJC Complex at the eastern edge of the park, which employs thousands of workers affiliated with the hospitals and medical schools, as well as the numerous retailers. Washington University’s Danforth Campus is the second greatest employment concentration.

MEDIAN HOUSEHOLD INCOME (2015)  
*ESRI, 2016*

Households with the highest median annual earnings are predominantly found to the west of the park in Clayton and University City. Neighborhoods to the north of the park, such as Visitation Park and Academy, have the lowest median household earnings, as does part of the Forest Park Southwest neighborhood.