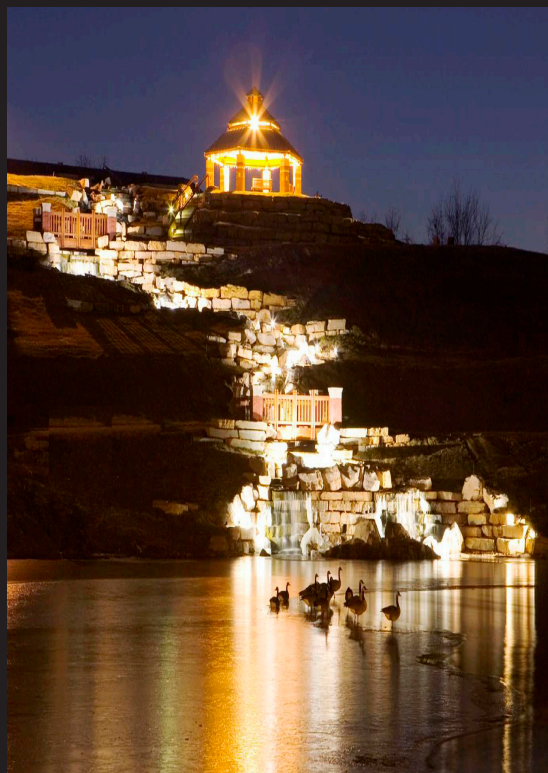




NORTH COUNTY INC.
Regional Development Assoc.



Economic Development Profile: North St. Louis County, Missouri



September 2013

Acknowledgements

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About North County Incorporated

North County Incorporated, Regional Development Association is an economic and community development advocacy organization serving North St. Louis County community since 1977. North County Inc. (NCI) markets the area as a truly great place to live, work, shop, worship, and learn. We actively work to enhance the residential and business climate.

Business, civic and community leaders make up our Board of Directors to assist in our efforts to work on quality of life issues impacting the North County area. We focus on economic development, education, healthcare, infrastructure and transportation needs.

NCI's leadership successfully builds collaborative partnerships to work on regional matters in an effort to create an overall more livable community. We coordinate the resources and efforts of community, civic and business leaders to speak as a unified voice on regional issues.

By connecting people, ideas and resources NCI is a catalyst for the betterment of the area. We welcome you to become more familiar with this exceptional community. More information about North St. Louis County community can be found at NorthStLouisCounty.com.

Historical, recreational and entertainment opportunities around this great community can be found at ExploreNorthStLouisCounty.com.

We encourage you to explore, experience and enjoy North St. Louis County!

www.NorthStLouisCounty.com

Table of Contents

<u>ABOUT NORTH COUNTY INCORPORATED</u>	<u>2</u>
<u>MARKET DATA ON ST. LOUIS REGION</u>	<u>4</u>
<u>EXECUTIVE SUMMARY</u>	<u>5</u>
<u>POPULATION, DEMOGRAPHICS, AND HOUSING</u>	<u>6</u>
<u>ECONOMY</u>	<u>8</u>
<u>LEADING EMPLOYERS</u>	<u>12</u>
<u>TAX RATES</u>	<u>13</u>
<u>RETAIL AND RESTAURANT BUSINESS POTENTIAL</u>	<u>13</u>
<u>EDUCATION</u>	<u>14</u>
<u>HEALTHCARE</u>	<u>14</u>
<u>TRANSPORTATION INFRASTRUCTURE</u>	<u>15</u>
<u>QUALITY OF LIFE</u>	<u>17</u>
<u>APPENDIX 1: NORTH COUNTY MUNICIPALITIES AND ST. LOUIS COUNTY</u>	<u>19</u>
<u>APPENDIX 2: METROPOLITAN COMPARISON, BUSINESS ESTABLISHMENT CHANGE, AND BUSINESS BY ZIP CODE</u>	<u>20</u>

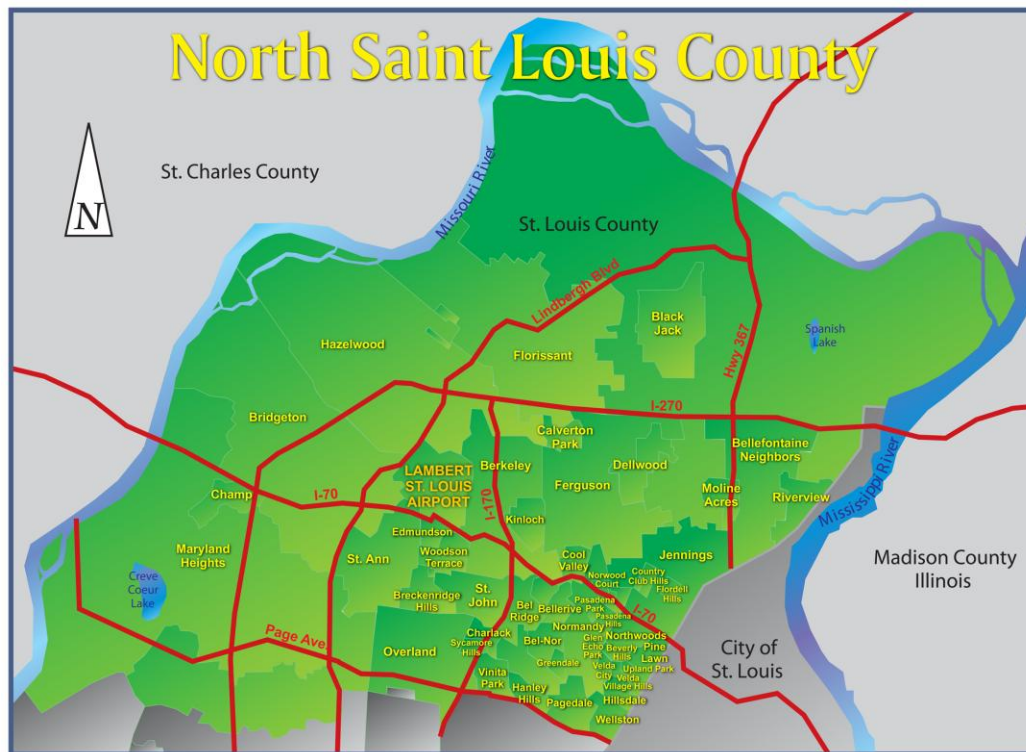
Market Data on St. Louis Region

Population	2.8 million
Households	1.1 million
Business Locations	194,362
Fortune 1000 companies	21
Current Gross Domestic Product	\$129,734 billion
Industry Clusters	<ul style="list-style-type: none"> • Plant and Medical Sciences • Advanced Manufacturing • Information Technology • Transportation and Distribution • Financial Services
Venture Capital Firms	14
Labor Force	1.3 million
Transportation Infrastructure	10,612 miles of roads including 758 miles of the Federal Interstate System
Percent of Adults with Advanced Degrees	11.6
Purchasing Power/Household	\$57,755
Current Gross Domestic Product	\$129,734 billion
Daily Travel Density	33,941
Total Business Headquarters	3,507
Homes affordable to median income	84.6%

Source: East-West Gateway Council of Governments

Executive Summary

North St. Louis County is a vibrant and growing part of the St. Louis Metropolitan area and home to a little over 375,000 residents and over 200 square miles. It is comprised of many dynamic and diverse communities located 15 minutes from the region's main business districts of downtown St. Louis and Clayton. North County is home to Lambert International Airport, higher education institutions, and important aerospace, IT, electrical, and health industries.



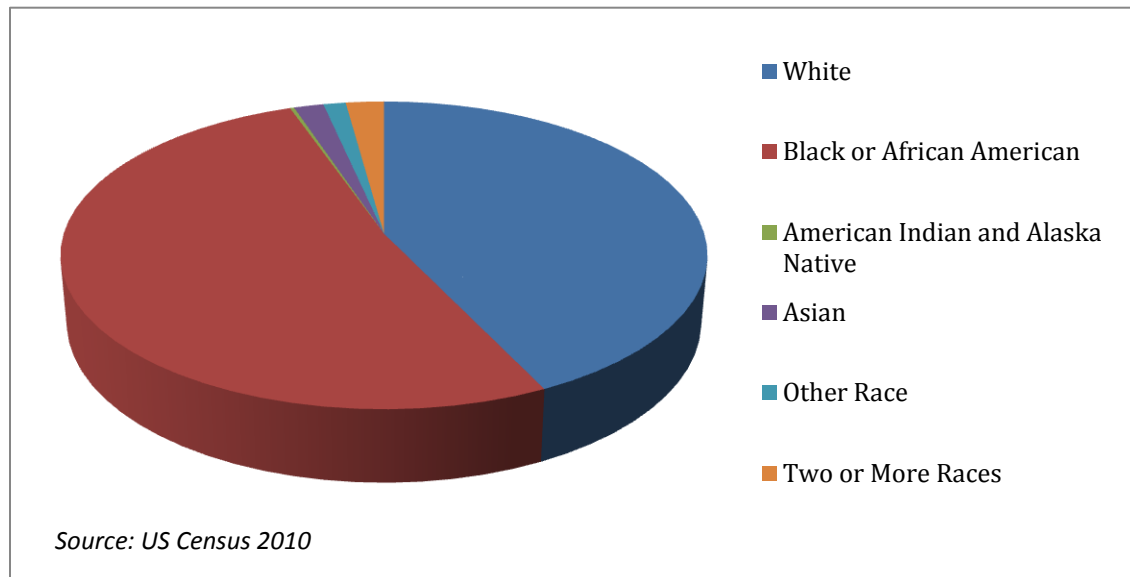
North St. Louis County is a leader in manufacturing employment and has the largest concentration of industrial and warehousing space in the St. Louis region. There is over 4.2 million square feet of manufacturing, research, and warehousing space available for sale or lease. Located at the Earth City Expressway and I-70 are the Earth City, Corporate Woods Business Park, and Riverport developments. At I-70 and I-170, North Park is the corporate headquarters for Express Scripts. There are more than 170,000 jobs in North St. Louis County, with an annual payroll of over \$8.1 billion. Together these centers create one of the largest commercial clusters in St. Louis County and are major centers for distribution and office space.

Population, Demographics, and Housing

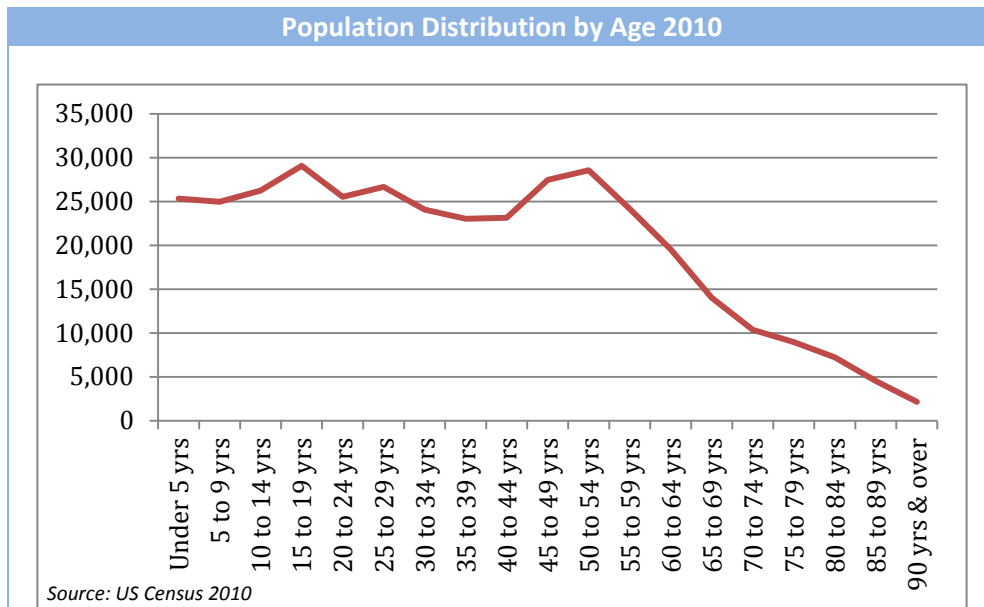
In 2010, North St. Louis County was home to 375,296 residents. There are 46 municipalities in North County as well as unincorporated areas governed by St. Louis County. North County features many vibrant and integrated communities mirroring nationwide trends in diversity. North County includes a diverse and vibrant population of foreign-born residents who account for 3.8 percent of the population.

Population by Race in North St. Louis County 2010

White	Black or African American	American Indian and Alaska Native	Asian	Other Race	Two or More Races
160,573	194,377	878	6,376	4,798	8,185
42.79%	51.79%	0.23%	1.70%	1.28%	2.18%



The median age of residents is 18 years and is well under the national average of 36 years while the overwhelming majority of the population is under the age of 60 years. There are two peaks in the age distribution with one at 50 to 54 years and another at 15 to 19 years, indicating a bulge of youth that will soon be entering the labor force.

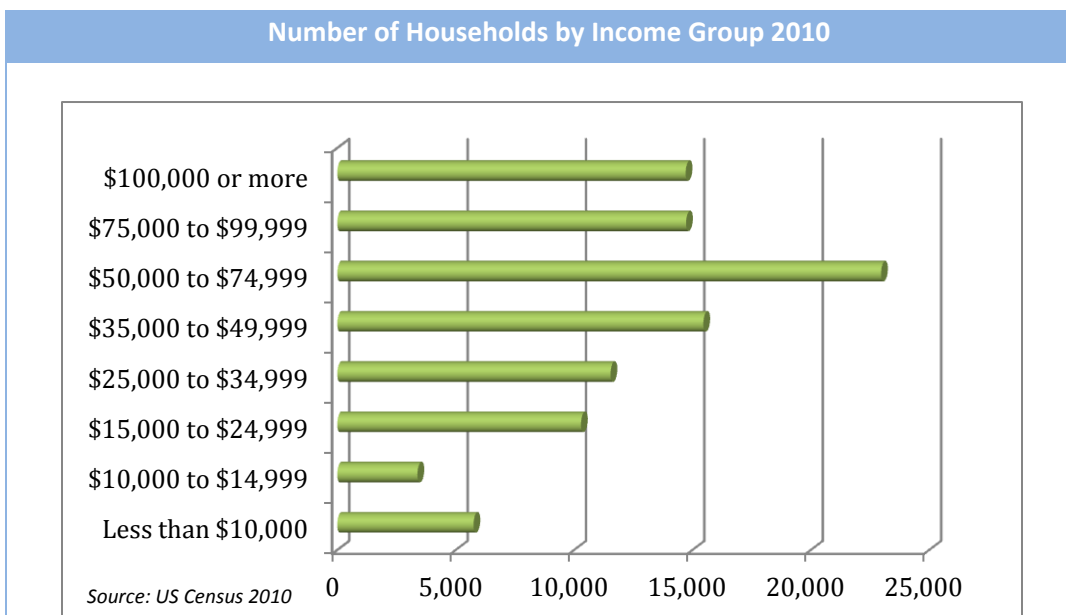


Solid education attainment rates for North St. Louis County make the population competitive in the St. Louis area workforce. When looking at the adult population 85

Education Attainment Rates 2010	
High School Degree or Higher	85%
Associates Degree or Higher	28%

Source: US Census 2010

percent have a high school degree or high school equivalent. This is within one percentage point of the average for the State of Missouri. Looking at higher education, 28 percent of the adult population has obtained a post-secondary degree, a few percentage points below the statewide average of 31 percent.



Median Household Income in North County is \$52,458 and is significantly higher than the median income of \$46,262 for households in all of St. Louis County. This makes the workforce highly competitive among the area labor force. The graph of households by income shows a normal distribution of income across the area. The households in the highest income bracket with over \$100,000 of annual income account for 15 percent of all households.

The number of owner occupied units accounts for 65 percent of all housing units in North County. This is only a few percentage points away from the average numbers for the greater St. Louis region. In conjunction with the high homeownership rates, 76 percent of the housing units are single family as opposed to multi-family.

Owner vs Renter: Total Housing Units

Owner-occupied units	Renter-occupied units
65.4%	34.6%

Source: US Census 2010

Multi and Single Family Housing Units

Single-family units	Multifamily units
129,299	38,880
76.4%	23.0%

Source: US Census 2010

Economy

The civilian labor force in North County stood at 198,698 workers in 2010 with an unemployment rate of 7.2 percent. This rate was

Civilian Labor Force and Unemployment 2010

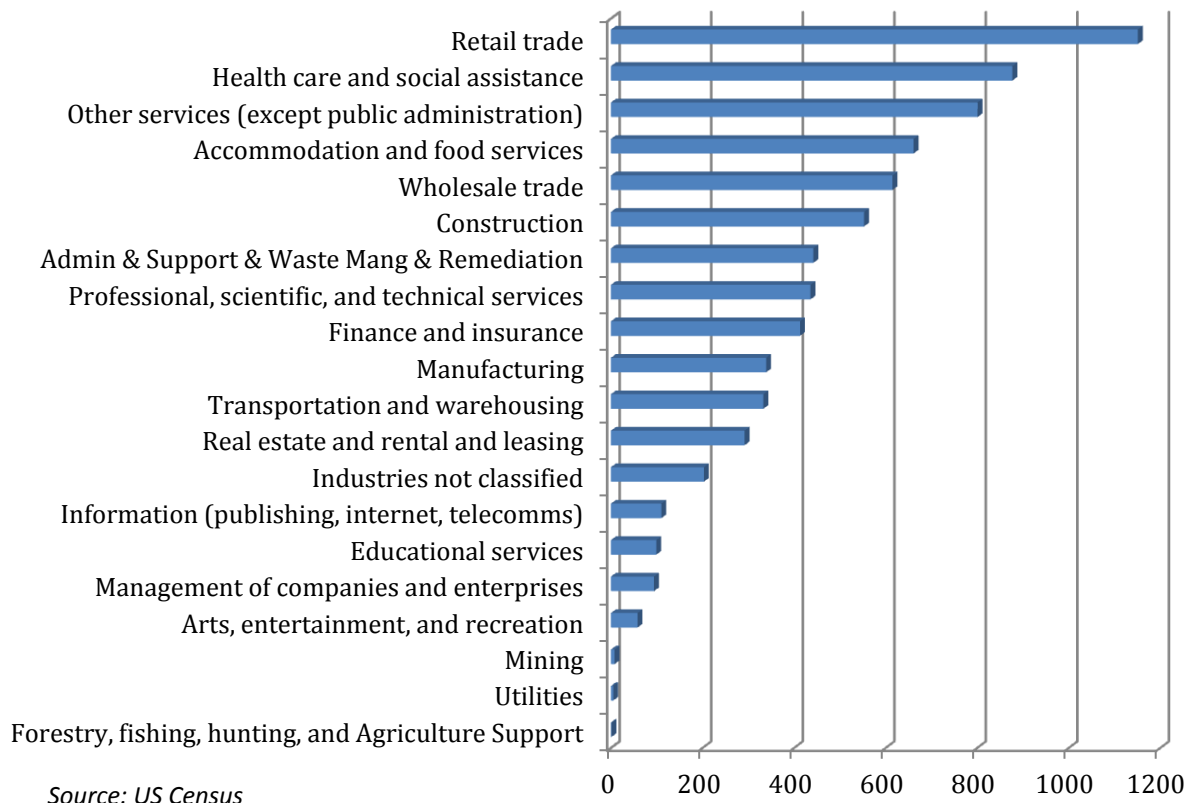
Civilian Labor Force	198,698
Unemployment Rate	7.20%

Source: US Census 2010

significantly lower than the 10.6 percent rate for the St. Louis metropolitan statistical area. The lower unemployment rate is a reflection of the high levels of education attainment and overall competitiveness of the labor force in North County.

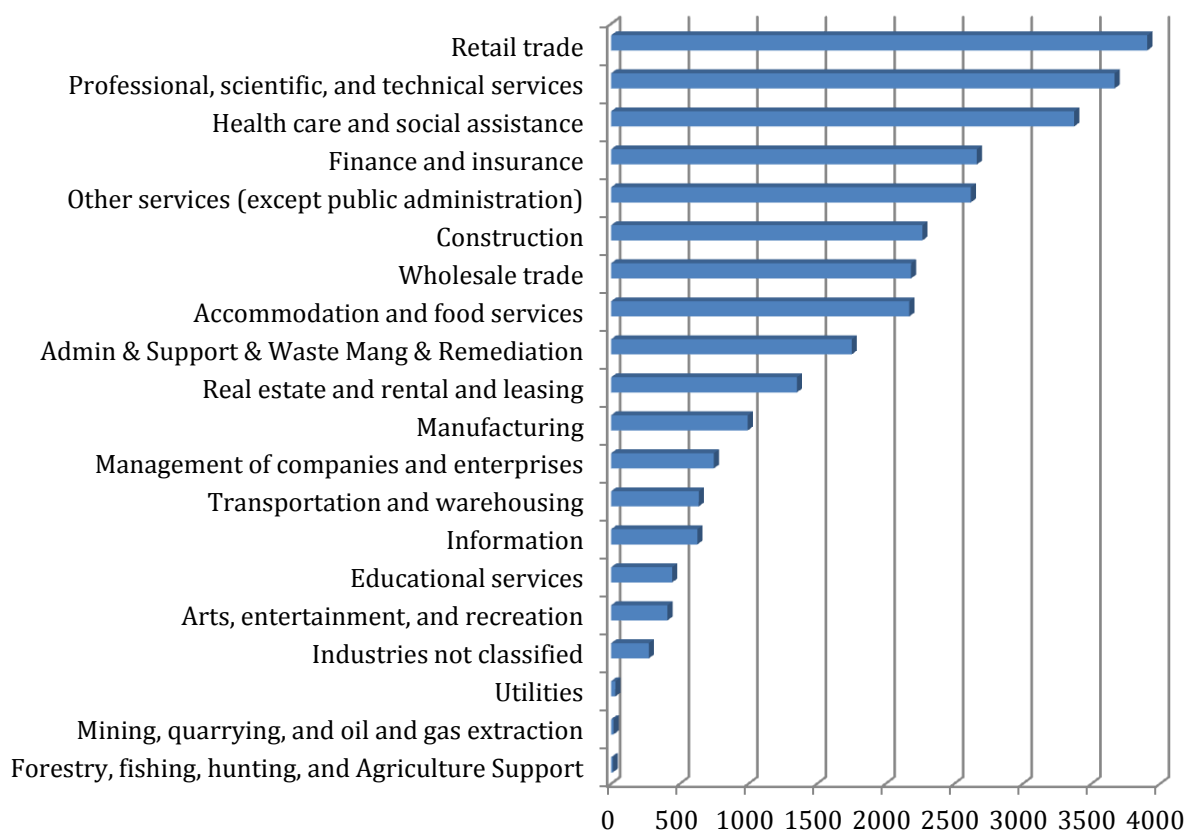
North St. Louis County features a diverse and thriving business community with establishments distributed across several industry sectors. The two largest sectors are retail trade and health care and social assistance, which include services for family, youth, and persons with disability. Despite a clustering of establishments in the above sectors, a strong manufacturing base is being maintained in the region. North County maintains a strong presence of businesses across other sectors, including professional, scientific, and technical services; food services; construction; finance and insurance; transportation and warehousing; and wholesale trade.

North St. Louis County Business Est. by Industry Sector 2009



The top ten industry sectors for the number of establishments for all of St. Louis County is almost identical to the top ten Industries in North County with a few key differences. Variations of note are health care and social assistance is stronger in North County compared to St. Louis County. Manufacturing also is a little stronger in North County and is the 11th largest sector in the county. The county-wide numbers for finance, insurance, and real estate are a little stronger than North County. North County has stronger wholesale trade and other service sectors and are led by retail and health care and social assistance establishments.

St. Louis County Business Establishments by Industry Sector 2009



Source: US Census

In addition to being one of the largest sectors of employment, health care and social assistance was one of the fastest growing sectors posting

North County: Key Industry Growth Sectors 1998-2009

Information	17%
Health care and social assistance	9%
Management of companies and enterprises	8%
Educational services	8%

Source: US Census

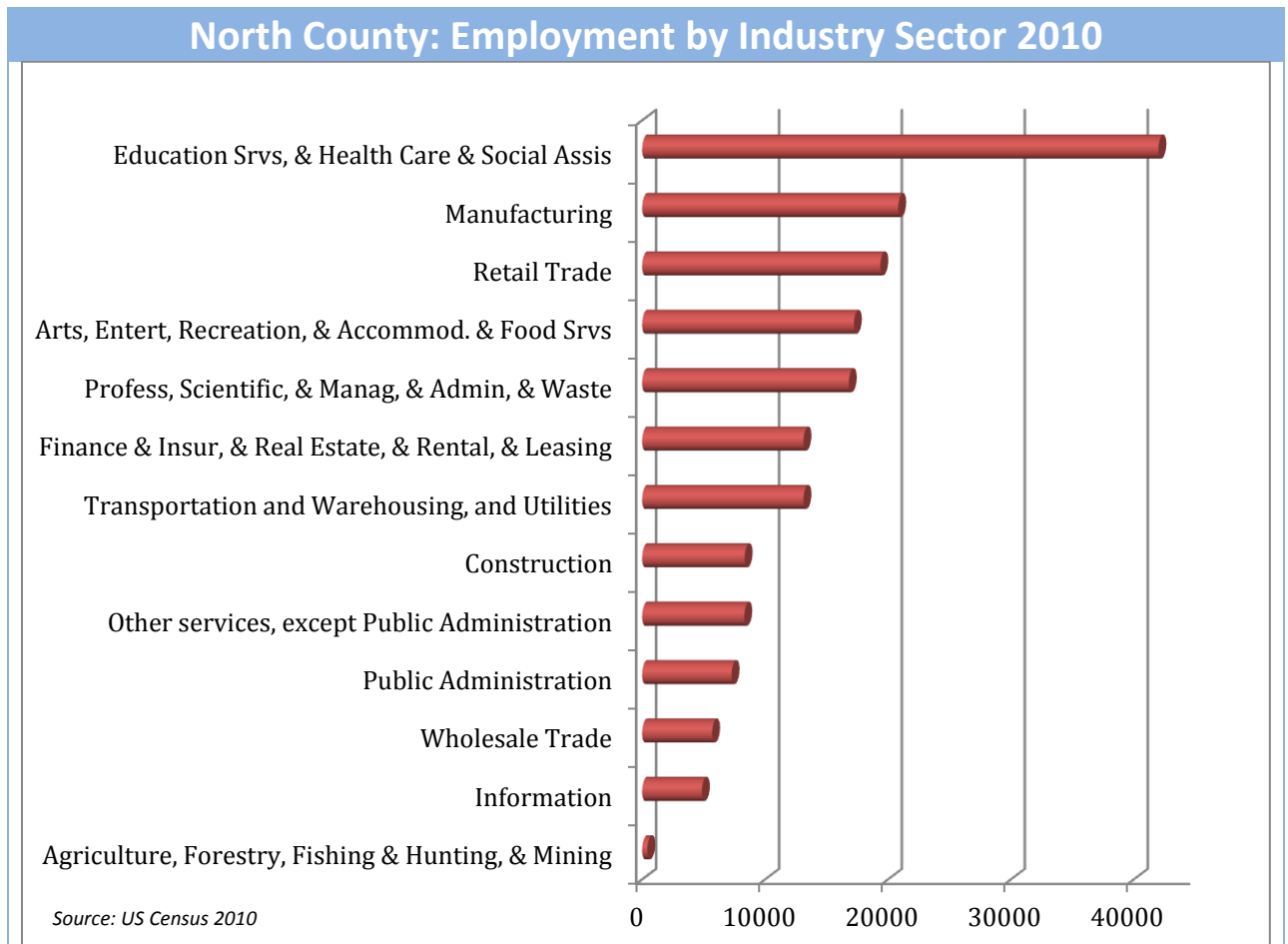
9 percent growth from 1998 through 2009. Although these industries account for a smaller percent of all business establishments, information, management of companies and enterprises, and educational services saw substantial growth in their respective sectors. St. Louis County as a whole had similar high growth ('98-'09) with their top four sectors being: management of companies and enterprises, utilities, information, and education services.

The total annual payroll in North County steadily increased over the ten-year period from 1999 to 2009. About \$8.2 billion in total payroll was paid in 2009, a 29% growth over the eleven-year time period, and was just slightly lower than the 37% growth in payroll for St. Louis County as a whole.

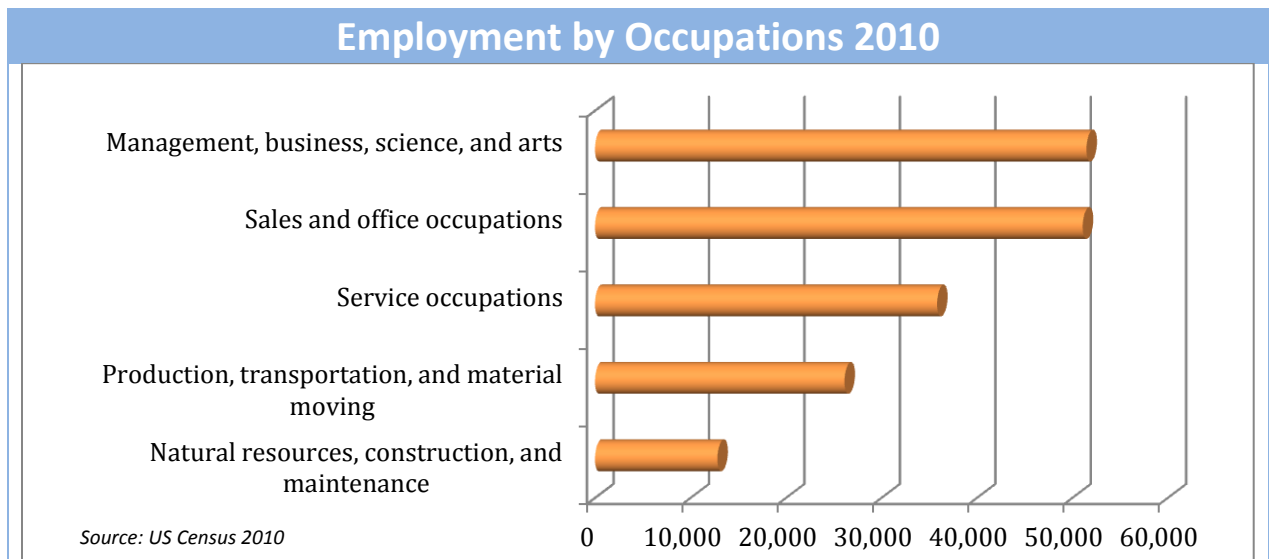
Total Annual Payroll Growth	
Year	Annual Payroll (\$)
1999	6,413,697,000
2003	6,420,256,000
2009	8,242,540,000

Source: US Census

Education services and health care both showed tremendous employment growth from 1998 to 2009; by 2010 these industries employed over 40,000 workers. There also is a broad employment base in manufacturing, anchored by Boeing Defense, Space, and Security Inc. and Emerson Electric Company operations. All other non-agriculture sectors posted significant employment numbers further diversifying workforce employment.



Employment by occupation mirrors the great diversity shown in the employment by industry. Management, business, science, and arts along with sales and office occupations account for 58 percent of employment. Services, production, transportation, and material moving account for the next largest percent of occupations in North County.



Leading Employers

Boeing Defense, Space, and Security and **Emerson Electric Co.** have been mentioned as leading companies in North County. **World Wide Technology** is another leading employer specializing in providing IT services to a broad range of clients. Additional employers of note in the aerospace industry are **Electronics & Space Corporation**, **GKN Aerospace**, and **DRS Technologies**, a supplier of defense electronic systems to government and commercial markets. **Mallinckrodt Pharmaceuticals.**, a \$2.1 billion company, has located its U.S. headquarters in North County. The medical research & services sectors are further represented by **Gallus Biopharmaceuticals LLC**, **BioMerieux**, and **Express Scripts Inc.** Emerson Electric and Express Scripts have located their corporate headquarters in North County. A national leader in customer management services, **Convergys** is also located in North County.



Aerospace Manufacturing Line

Tax Rates

North County also features competitive tax rates. The corporate tax rate for the state of Missouri is 6.5 percent. The law allows for 50 percent of federal tax payments to be deducted while computing taxable income. This creates an effective corporate tax rate of 5.2 percent. Personal property, real estate, and sales tax rates will vary depending on local municipalities. The property tax rates range anywhere from zero to \$1.27. In unincorporated St. Louis County, the base sales tax rate is 6.325 percent.

Retail and Restaurant Business Potential

In 2011, Social Compact Inc. did a study of several neighborhoods in North County to better comprehend unmet demand and the potential for future investments. The neighborhoods and municipalities included in the study were Bellefontaine-Riverview, Ferguson, Florissant, Halls Ferry-Chambers, Jamestown, Jennings, Normandy School District, Overland-Ritenour, Spanish Lake CDP, West Ferguson, and Hazelwood. The numbers for this profile reflect the aggregate of all the neighborhoods above in addition to the overwhelming majority of unincorporated North County.

The retail sector in North County is the third largest for employment and is supported by \$762.5 million in retail spending from outside the area and spent at North County businesses. The same figure for St. Louis City

indicates a retail spending loss of \$615 million in surrounding areas. There is also an additional \$78.2 million spent at North County restaurants and neighborhood apparel establishments. The Normandy, Bellefontaine, and Riverview sub-areas were singled out for unmet retail demand and the capacity to support a substantial expansion in local retail.

Population density for the area averages 4.0 persons per acre while income density per acre is around \$91,000 compared with only \$13,679 per acre for the 16 county St. Louis metropolitan statistical area. The \$49.5 million spent on groceries combined with population density in the area provides residents with excellent grocery service with an average distance of about 1.2 miles to a store.

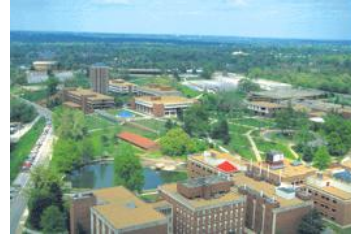
Outside Expenditures-North County

Retail sector	\$762.5 million
Restaurants and neighborhood apparel	\$78.2 million

Source: Social Compact Inc.

Education

Higher education in North St. Louis County is anchored by the University of Missouri-St. Louis, a four-year, public institution. The area is also home to St. Louis Community College-Florissant Valley, a two-year institution which is part of the St. Louis Community College system. In addition to the University of Missouri-St. Louis there are three other four-year universities: St. Louis University, Washington U, and Webster University, which constitute the four largest Universities within St. Louis City and St. Louis County based on enrollment. Together, they offer a wide range of essential degree and research programs for greater St. Louis. This includes many degrees offered in business, math, nursing, optometry, medicine, dentistry, pharmacy, engineering, hard sciences, along with MIS and computer science programs.



University of Missouri-St. Louis

There are seven K-12 public school districts in North St. Louis County along with numerous parochial and private education opportunities. Twelve area schools have received the prestigious Blue Ribbon School designation by the U.S. Department of Education. The State of Missouri has honored the school districts of Ferguson-Florissant, Hazelwood, and Pattonville, with *Distinction in Performance* awards. There are also twelve schools that have been designated gold star schools by the Missouri Department of Education.

Public School Districts

Ferguson-Florissant	Hazelwood	Jennings	Normandy
Pattonville	Ritenour	Riverview Gardens	

Source: North County Inc.

Healthcare

North County is home to Christian Hospital and SSM DePaul Health Center, who have established themselves as award-winning health providers for North County and greater St. Louis. There is also a large selection of other primary health providers in addition to these two hospitals. The area's major health providers have the highest quality staff and facilities that are outfitted with state-of-the-art equipment. SSM Health Care operates DePaul Health Center and is distinguished as the oldest hospital west of the Mississippi River, winning the prestigious Malcolm Baldrige National Quality Award.



SSM DePaul Health Center

Christian Hospital is noted for being ranked near the top in Missouri for overall quality of care. Overall North County providers are noted for a high quality of services in cardiothoracic surgery, oncology, neurosurgery, emergency medicine, orthopedic medicine, urology, pulmonology, gastroenterology and radiology.



Christian Hospital Northeast

Hospital Beds and Revenue

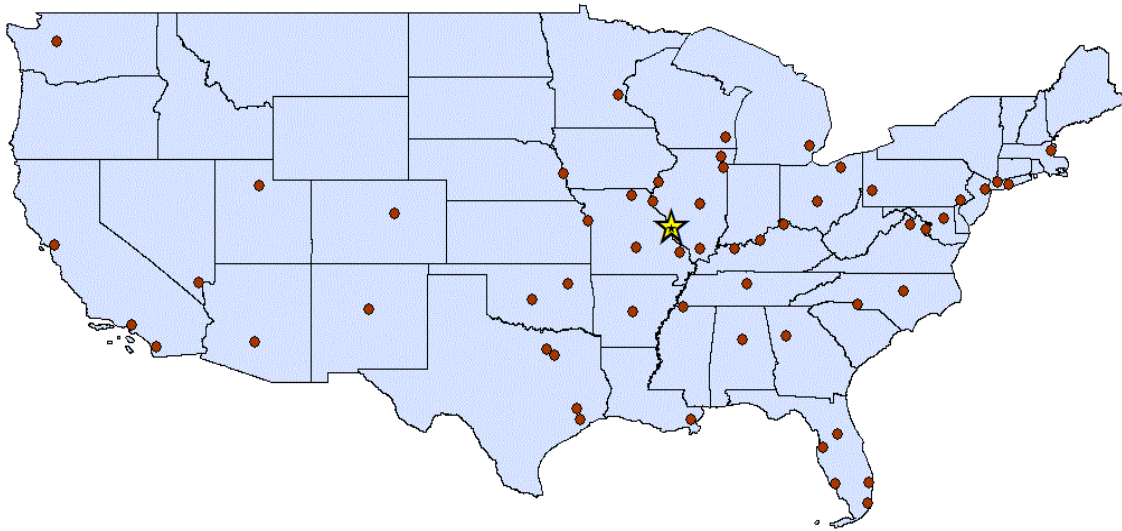
Hospital Name	Staffed Beds	Total Discharges	Patient Days	Gross Patient Revenue
Christian Hospital	460	14,197	71,959	\$720,291
SSM DePaul Health Center	422	22,586	102,719	\$1,002,249

Source: American Hospital Directory

Transportation Infrastructure

North County is home to Lambert-St. Louis International Airport, which has provided the area with commercial air service since 1933. The Airport has two terminals and 88 gates and is home to the St. Louis Foreign-Trade Zone which covers 800 acres of land around the airport. Eleven air carriers provide direct non-stop service to over 50 U.S. destinations with international connections to Toronto, Canada, Punta Cana, Dominican Republic, , and Cancun, Mexico. Lambert Airport is an established aviation hub for St. Louis and the Midwest region. It is currently in the middle of a major terminal renovation to improve service and expand capacity. The Airport has ample on-site as well as off-site parking and is linked to downtown and the Clayton Business districts via Metrolink light rail service.

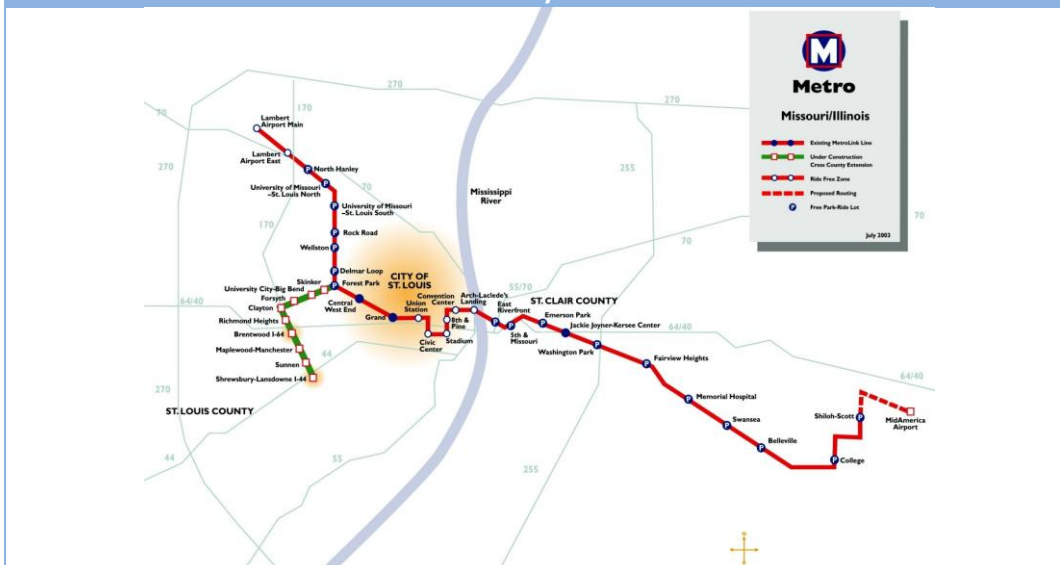
Non-Stop Domestic Air Connections via Lambert Airport



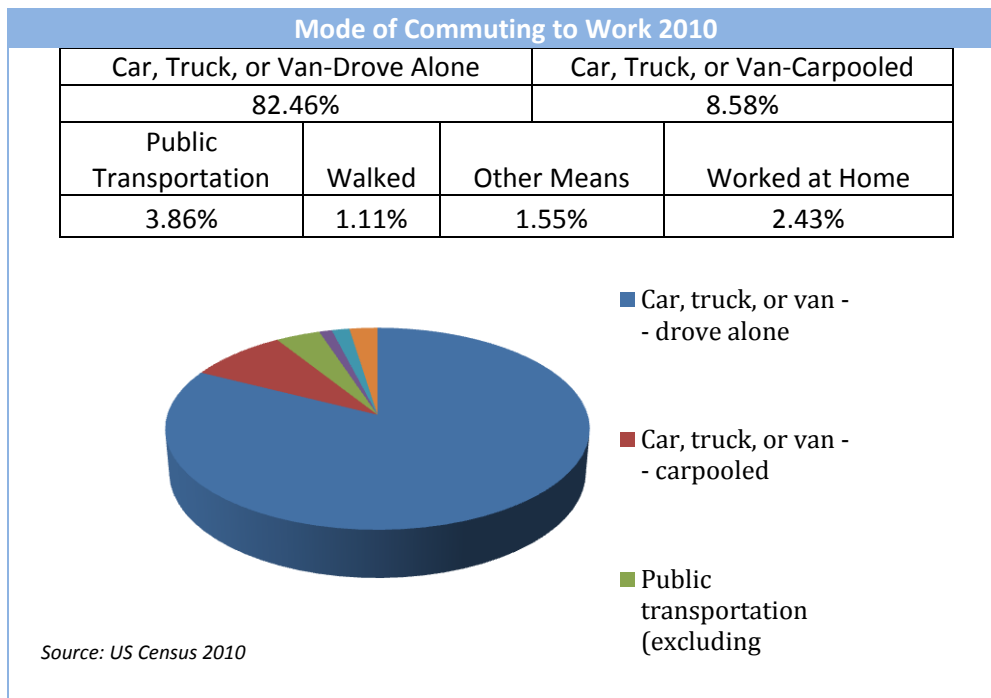
Source: Lambert-St. Louis International Airport

North County is served by three major interstate highways that connect the area to the rest of the greater St. Louis metropolitan area (see map 1). Interstate 70 (I-70) is a transcontinental route that links the area to Downtown St. Louis and St. Charles County. The main ring road around St. Louis is I-270, and is the main by-pass for I-70 traffic traversing thru the St. Louis metropolitan area. The I-270 corridor connects North County with many other suburban employment and population centers around greater St. Louis. Finally, there is I-170 which connects North County to central St. Louis County including the Clayton Business district and Washington University.

Metro Transit System St. Louis



The average travel time to work for North County residents matches the average commute of 24 minutes for the entire St. Louis region. St. Louis Metro Transit provides transit options to the developed areas of North County. Transportation options include dozens of bus routes and a Metrolink rail line that services North County via all of the stations between Wellston and Lambert Airport Main. Metro transit facilities offer connectivity to other areas of St. Louis City and St. Louis County through six park and ride lots located in the North County region. The transit agency is currently investing in a new transit hub with a park and ride facilities that will help create a central transfer center for area buses.



Quality of Life

There are numerous recreational opportunities in North County including 15 county parks, numerous municipal parks, and at the confluence of the Missouri and Mississippi Rivers is the 4,300 acre Columbia Bottom Conservation Area. In addition to the above resources the area features seven golf courses along with several water parks and public swimming pools. St. Louis is situated in a temperate climate zone with cool winters and warm humid summers. This climate makes it ideal for engaging in outdoor activities and taking advantage of the dozens of hiking/biking, walking, and nature trails in the area. This includes walking tours of dozens of historical homes and cemeteries many of which are on the National Register of Historic Places.

Average Monthly Temperatures and Precipitation

Average	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
High Temp(F)	39	44	55	67	76	85	89	88	80	69	55	43
Low Temp(F)	22	26	35	46	56	66	70	68	60	48	37	27
Precipitation (Inches)	2.1	2.3	3.6	3.7	4.1	3.8	3.9	3	3	2.8	3.7	2.9

Source: National Oceanic and Atmospheric Administration

The North County region is also home to several arts, cultural, and entertainment establishments. The art scene is composed of university-sponsored venues like Gallery 210 in addition to several independently run galleries. Restaurants in North County offer a wide selection of both chain and family owned dining establishments. Late-night entertainment is anchored by Westport Plaza, which features a wide selection of clubs, brew pubs, and live comedy and music venues. There are also several performance venues in North County such as the Touhill Performing Arts Center, Verizon Wireless Amphitheater, the Eagan Civic Center and Fischer Theater that offer many live music and theater performances throughout the year. For more details about the plentiful historical, recreational and entertainment venues available in North County, go to ExploreNorthStLouisCounty.com.



Touhill Performing Arts Center

Appendix 1: North County Municipalities and St. Louis County

Bellefontaine Neighbors	Hillsdale
Bellerive	Jennings
Bel-Nor	Kinloch
Bel-Ridge	Maryland Heights
Berkeley	Moline Acres
Beverly Hills	Normandy
Black Jack	Northwoods
Breckenridge Hills	Norwood Court
Bridgeton	Overland
Calverton Park	Pagedale
Champ	Pasadena Hills
Charlack	Pine Lawn
Cool Valley	Riverview
Country Club Hills	St. Ann
Dellwood	St. John
Edmundson	Unincorporated North St. Louis Co.
Ferguson	Uplands Park
Flordell Hills	Velda City
Florissant	Velda Village Hills
Glen Echo Park	Vinita Park
Greendale	Vinita Terrace
Hanley Hills	Wellston
Hazelwood	Woodson Terrace

Appendix 2: Metropolitan Comparison, Business Establishment Change, and Business by Zip Code

Metropolitan Comparison

	North County	St. Charles	St. Louis City
Population	375,000	360,000	319,000
Median income	\$52,458	\$70,331	\$33,652
Single family housing units	129,299	112,000	82,000
Owner-occupied	65%	82%	47%
Paid employees	174,590	115,826	238,347
Payroll	\$8.2 billion	\$3.9 billion	\$11.0 billion
Establishments	7,491	7,954	9,061

Business Establishment Change 1998-2009

Industry Sector	Businesses 2009	Percent Change	Net Change
Retail trade	1,151	-16	-215
Health care and social assistance	877	+9	76
Other services (except public administration)	801	-19	-189
Accommodation and food services	661	-10	-71
Wholesale trade	615	-17	-130
Construction	553	-23	-167
Administrative and support and waste management and remediation services	442	-9	-42
Professional, scientific, and technical services	436	-13	-67
Finance and insurance	413	-5	-24
Manufacturing	339	-22	-96
Transportation and warehousing	333	-1	-2
Real estate and rental and leasing	292	+3	9
Industries not classified	203	+26	161
Information	110	+17	16
Educational services	99	+8	7
Management of companies and enterprises	94	+8	7
Arts, entertainment, and recreation	58	-33	-29

Appendix 2, Continued

Business by Zip Code

		63031		63033		63034	
	Year	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)
	1998	7,978	156,865,000	10,017	166,374,000	2,563	43,461,000
	2003	7,872	186,075,000	8,389	159,562,000	2,798	50,092,000
	2009	7,202	187,449,000	8,374	164,145,000	1,901	47,848,000
		63042		63043		63044	
	Year	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)
	1998	18,243	743,128,000	26,816	963,112,000	26,435	796,864,000
	2003	20,096	930,270,000	29,733	1,347,525,000	26,967	913,599,000
	2009	18,931	777,689,000	26,818	1,330,461,000	25,175	1,074,615,000
		63045		63074		63114	
	Year	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)
	1998	14,029	551,855,000	7,939	129,991,000	13,327	382,097,000
	2003	16,653	762,945,000	5,456	109,024,000	13,785	448,790,000
	2009	16,121	935,666,000	3,674	80,301,000	20,095	896,797,000
		63121		63133		63134	
	Year	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)
	1998	6,123	186,849,000	3,870	138,092,000	34,455	1,252,414,000
	2003	6,470	185,244,000	3,726	139,334,000	14,101	418,999,000
	2009	6,239	359,723,000	2,384	86,385,000	16,341	1,508,795,000
		63135		63136		63137	
	Year	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)
	1998	14,453	63,604,000	11,654	334,058,000	1,752	35,618,000
	2003	3,080	74,418,000	11,161	376,260,000	1,902	44,541,000
	2009	2,406	57,948,000	11,247	435,477,000	1,431	35,026,000
		63138		63140		63145	
	Year	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)	Paid Employees	Annual Payroll (\$)
	1998	2,225	43,038,000	121	3,333,000	11,091	422,944,000
	2003	2,497	54,567,000	163	14,007,000	9,699	205,004,000
	2009	2,166	55,289,000	261	5,239,000	3,824	203,687,000

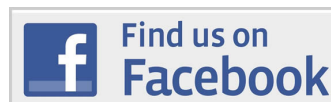


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Your North County Connection to People, Ideas and Resources!