2012 Strategic Plan

Analyzing the Setting
State of the County
Budget Narrative
2008 Strategy Assessment

Telling the Story
Briefing papers
Story in pictures
Community narratives

Listening to the Public
Citizen Survey
Policy Roundtables

Crafting the Strategy
Multiple Participants
A Changing America
2010 Census

Population Shifts

Immigration

Aging Population

Changing Households
Regional Development Pattern

Source: East-West Gateway
WHO WE ARE
Population Change

% Change
2000 - 2010

Council Districts, 2012
Population Change 2000-2010
-79% - -20%
-19% - 0%
1% - 10%
11% - 20%
21% - 33%

St. Louis County
Race

Racial Breakdown

Percent of Population

**African-American**
- 0% - 10%
- 11% - 25%
- 26% - 50%
- 51% - 75%
- Over 75%

White  Black  Other

Council Districts, 2012

St. Louis County
Median Age

Age Breakdown
St. Louis County

- 15% <10
- 12% 10-29
- 26% 30-44
- 29% 45-64
- 18% 65+

Boomers

Millennials

St. Louis County
Median Age: 39.9
Changing Households

- Families with Children*
  - Under 25%
  - 25% to 33%
  - 33% to 40%
  - Above 50%

- Single Parent Families*
  - Below 10%
  - 10% - 25%
  - 25% - 50%
  - Above 50%
Educational Attainment

4-Year Degree or More

Percent of Adults

- STLCO
- MSA
- MO
- US

Map showing distribution of educational attainment by council districts, 2012.

Bachelors Degree or more
- 2% - 17%
- 18% - 32%
- 33% - 49%
- 50% - 65%
- 66% - 82%
Median Income

Median HH Income

- $48,000
- $49,000
- $50,000
- $51,000
- $52,000
- $53,000
- $54,000
- $55,000
- $56,000
- $57,000
- $58,000

Median Household Income

- Under $35,000
- $35,000 - $49,000
- $50,000 - $69,999
- $70,000 - $89,999
- $90,000 - $166,000

Council Districts, 2012

St. Louis County
Population Below Poverty

Persons Below Poverty

Percent of Population

0% 2% 4% 6% 8% 10% 12% 14% 16%

STLCO MSA MO US

Population Below Poverty

- Population Below Poverty
  - 35% - 49%
  - 25% - 34%
  - 15% - 24%
  - 8% - 14%
  - 0% - 7%

St. Louis County
Where We Live
Decade Housing Built

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<th>Decade</th>
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St. Louis County
Total Appraised Value

- >500k
- 200k-500k
- 150k-200k
- 100k-150k
- 75k-100k
- 50k-75k
- <50k

St. Louis County
Smaller & Older Housing

Older than 1960
Smaller than 1200 sq. ft.

Appraised Value

St. Louis County
**Housing Sales**

**Monthly Median Sales Prices 2006-2012**

- **Jan 2007**: $177,450
- **June 2007**: $142,500
- **January 2012**: $90,500
- **June 2011**: $133,250

2012 Q1: 2,704 sales (near 2008 level)

Source: St. Louis Association of Realtors
Foreclosures

St. Louis County Foreclosures 1998 - 2011

Foreclosure Rate 2010 & 2011

Council Districts, 2012

- Single Family Foreclosure
  - 0% - 0.8%
  - 0.9% - 1.4%
  - 1.5% - 2.3%
  - 2.4% - 3.7%
  - 3.8% - 6%

St. Louis County
St. Louis Metropolitan Area Percentage of Employment Base

1,246,655 Total Jobs In MSA

- 45%
- 27%
- 18%
- 10%

St. Louis County Jobs: 564,322

St. Louis County
St. Charles County
St. Louis City
Other MSA
Regional Commute to St. Louis County Jobs

St. Charles County: 343,395
St. Louis City: 71,785
St. Louis County: 48,135
Jefferson County: 11,115
Franklin County: 17,830
Madison County: 12,200
St. Clair County: 58,330
St. Louis County: 3,425
Monroe County: 11,115
Employment Density

- Jobs Per Square Mile
  - 0 - 822
  - 823 - 2,958
  - 2,959 - 6,738
  - 6,739 - 14,627
  - 14,628 - 27,610
  - 27,611 - 41,908
St. Louis County Jobs
2001 - 2010

Q3 2011: 564,322 jobs

- STLCO
- STLCITY
- StCharlesCO
Unemployment Rate Comparison

- St. Louis County
- St. Louis MSA
- Missouri
- USA
Dominant Industry Sectors

Share of Employment by Industry, Q3 2011

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

0% 5% 10% 15% 20% 25%

STLCO MO

St. Louis County
Rebounding Industries

Change in Employment by Industry 2010 – Q3 2011

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

-4% -3% -2% -1% 0% 1% 2% 3% 4%
Population and Jobs

- Job Retention & Attraction = People Retention & Attraction
- Immigration as the new driver of growth

Aging Boomers

- Moving, retiring, downsizing, spending less
- Seeking smaller homes, walkable places, amenities & services

Young Millenials

- Staying home longer, marrying later, embracing diversity, wired 24/7
- Seeking jobs, urban neighborhoods, rentals, walkable places, amenities & transit
Policy Implications

Aging Homes & Changing Housing Market
- More options, effective tools, & resources needed to address rehabilitation, demolition, new construction, foreclosures

Energy Policies and Practices
- Rising energy costs will shape where jobs and people locate

Retail Rightsizing
- As aging Boomers spend less and Millennials buy on the internet, bricks-and-mortar retail will be impacted
St. Louis County

reimagine

Louis County

Engine

Region

Reinvent

Future

Retool

Revitalize

Work

Rethink

Economic

Core

Respond

Live

Readjust