

Central West End



2016 Neighborhood Profile



Washington University Medical Center

A partnership between BJC HealthCare and Washington University in St. Louis

Central West End

Neighborhood Introduction

The Central West End neighborhood, or CWE, is one of the region's most sought after communities. Located adjacent to the award-winning Forest Park, this 112 block area contains some of Saint Louis' most regal historic architecture and presents one of the most



dense urban environments in the Midwest. With over 15,000 residents and 36,000 employees, the American Planning Association selected the CWE as one of America's Top Ten Great Neighborhoods in 2014.

The neighborhood is home to the Washington University Medical Center (WUMC) and Cortex Innovation Community, which together make up the second largest employment center in the region. This complex is home to world class patient care, research, teaching and innovation facilities which attract over 4 million visitors per year.



The Central West End is St. Louis' premiere 24 hour mixed-use transit friendly neighborhood. The Euclid Avenue Entertainment District is home to many of the region's trendiest restaurants, bars, boutiques and shops. The emerging Sarah Street corridor is home to neighborhood-level and regional retail centers, cafes, and a burgeoning tech scene. Planning is currently underway to transform Duncan Avenue in the Cortex-WUMC area into a thriving mixed-use district to serve the growing population of knowledge workers and residents.



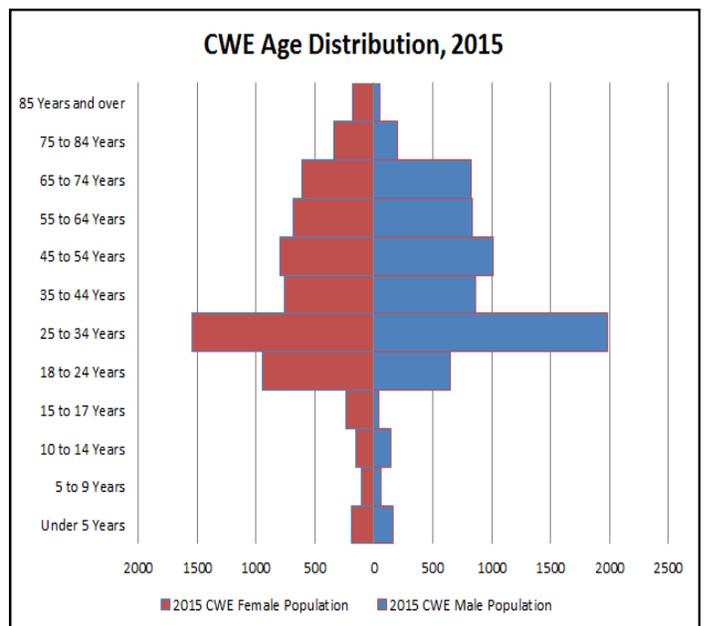
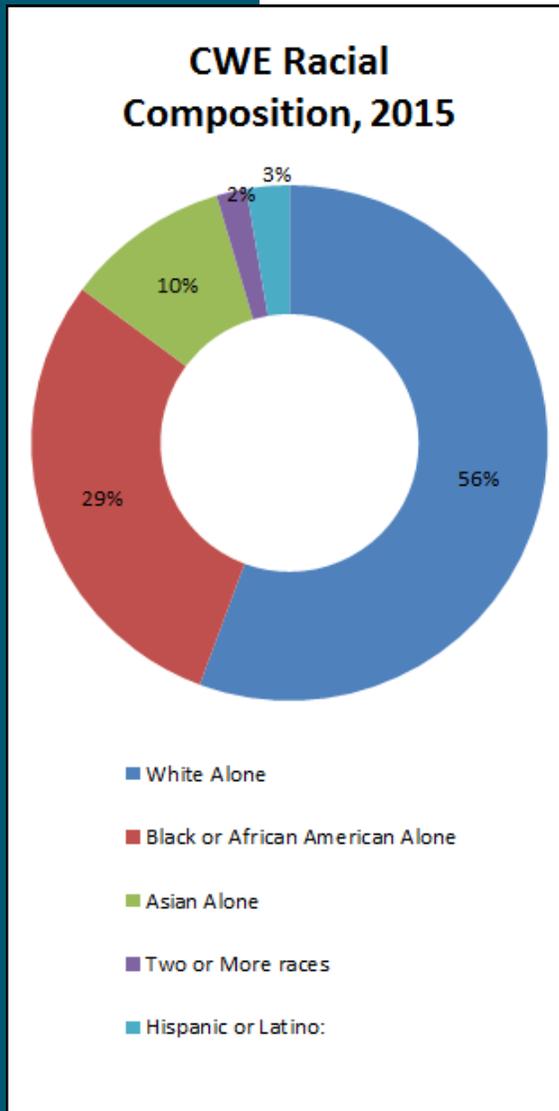
Development within the neighborhood has reached new heights. Over the past ten years, Cortex and the Washington University Medical Center have experienced a total investment of \$1.133 billion in development. BJC Health Care is in Phase One of a \$1.2 billion dollar Campus Renewal Program that is transforming the skyline of the medical center. In addition, Washington University School of Medicine and the St. Louis College of Pharmacy are both undertaking major building projects to enhance their facilities. Meanwhile, the Cortex Innovation Community has grown to over 200 companies and is building hundreds of thousands of square feet of new innovation space.

Residential construction throughout the neighborhood is booming, where \$459 million in private development has occurred over the past decade. As of the first quarter of 2016, over a thousand new units are coming on line or in the latter stage of planning. The impact has been enormous. The value of building permits throughout the neighborhood is greater than the rest of the region collectively.



Central West End

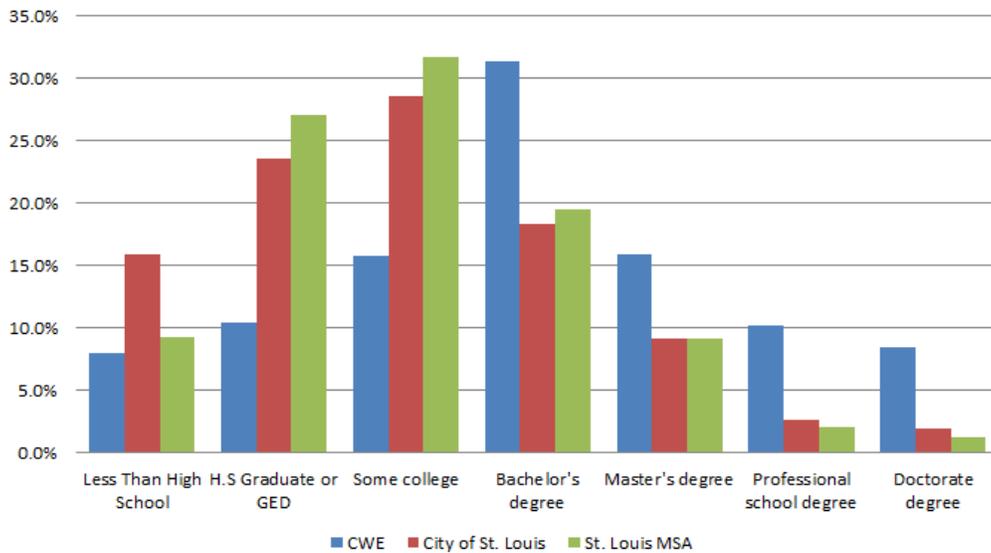
Demographics



- The Central West End had an estimated 14,471 residents in 2010. Population density was 7,656 residents per square mile.
- In 2015, the Central West End had a median family household income of \$99,087, greater than the median family household income of the St. Louis metro area at \$70,718.*
- The median age of CWE residents was 37.9yrs in 2015, older than the City of St. Louis median age at 34.6yrs and younger than the St. Louis MSA median age at 38.7 years.*

*based on Census tract level data in 2015 ACS. Census tracts do not conform to exact neighborhood boundaries and, in the ACS, include a significant margin of error

CWE Educational Attainment Population 25 years and older, 2015



| | 1 mile radius | 3 mile radius | 5 mile radius |
|--|---------------|---------------|---------------|
| Households | 9,922 | 70,540 | 169,861 |
| Households with Income above \$40k per year | 3,902 | 22,819 | 63,764 |
| Households with Income above \$50k per year | 3,007 | 16,610 | 47,589 |
| Households with Income above \$60k per year | 2,489 | 12,359 | 35,800 |
| Households with Income above \$100k per year | 1,254 | 4,865 | 13,987 |

66%

66% of CWE residents above the age of 25 had a Bachelor's degree or higher level of education in 2015. This was over twice the rate of the St. Louis metro area at 32%

34%

34% of CWE residents above the age of 25 have earned a Master's, Professional, or Doctoral degree. This is nearly 3x the rate of the St. Louis metro area at 12%

Central West End

Development Summary

**\$459
million**
*Investment in
commercial and
residential
development in
the CWE
since 2005*

**\$1.133
billion**
*Investment in
WUMC/Cortex
facility
expansion since
2005*

The Central West End has seen an impressive amount of investment of both private and public dollars over the past decade, building off the neighborhood's historic character, major institutional partners, and enviable location to create one of the strongest real estate submarkets in the St. Louis region.

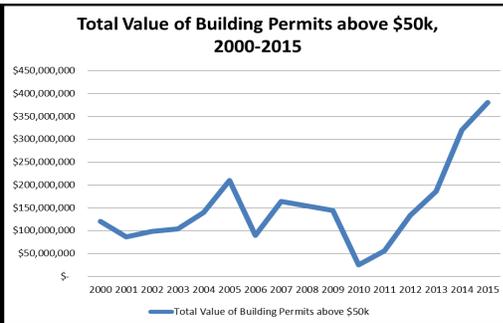
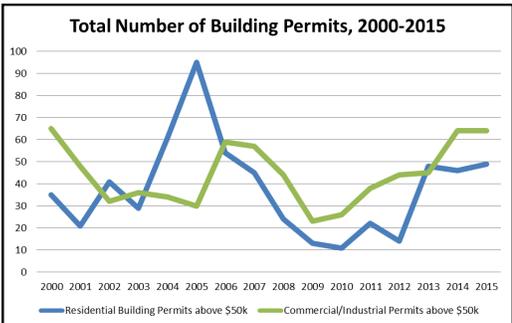
While the global financial crisis and recession of the last decade caused a downturn in the real estate market throughout the country, the key public and private institutions working in the Central West End utilized this time to plan and launch their next phases of major investment and expansion. As the institutions within the Washington University Medical Center and Cortex have begun implementing multi-billion dollar facility expansions to strengthen their local, national, and global impact in the fields of healthcare and technology, they have set off a wave of major commercial and residential development in the surrounding Central West End neighborhood.

Recently completed and underway major facility expansions in the WUMC Campus and Cortex include:

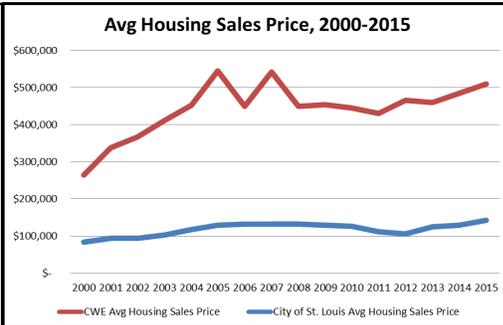
Barnes-Jewish Hospital north campus
St. Louis Children's Hospital expansion
WUSM McKinley Avenue Research Building
WUSM Environmental Health and Safety Building
WUSM Mid Campus Center
WUSM TAB Extension
St. Louis College of Pharmacy
Shriners Hospital for Children
TechShop St. Louis
Cortex Commons
@4240 Duncan
CIC@CET



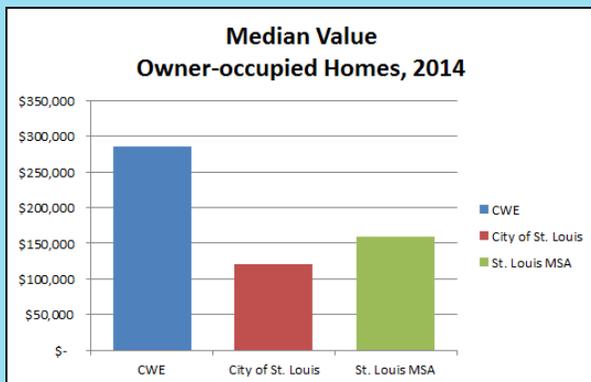
Since 2009, large scale building permits for new commercial and residential construction and rehab have increased year over year, returning to and even exceeding pre-recession levels of building activity in the CWE. Notably however, the investment value of recent construction projects in the CWE dwarfs the value of pre-recession projects, introducing a sub-market for residential and commercial development unseen in the City of St. Louis in decades.



In 2015, there were 85 home sales in the Central West End, with an average sale price of \$509,385, as home sales & prices have been climbing since 2009.



In 2014, the median owner-occupied home value in the CWE was \$285,900, nearly twice the median home value in the St. Louis region.



Central West End

DEVELOPMENT SUMMARY 2005—PRESENT

Current Neighborhood Development

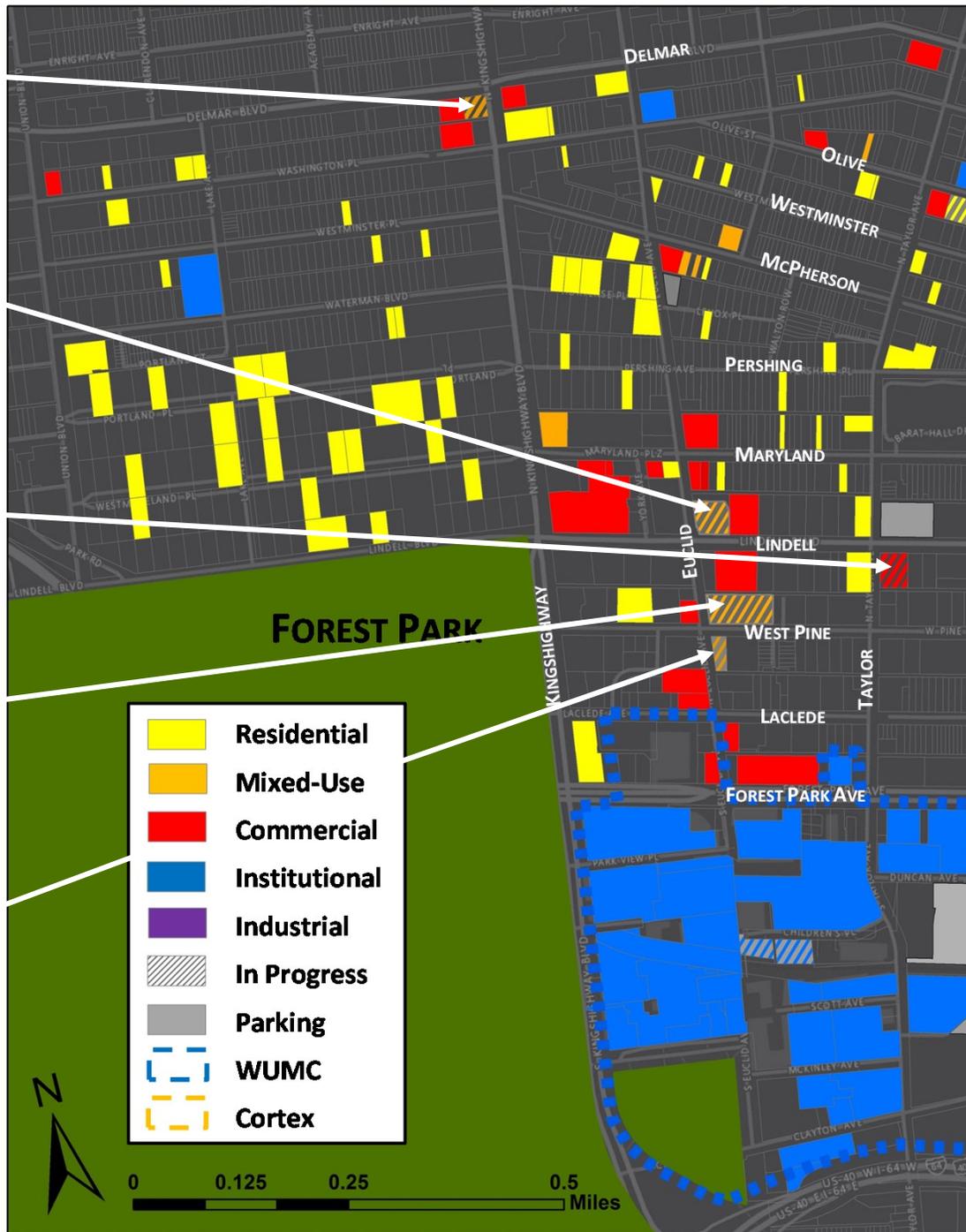
\$10M
Euclid Plaza
 Mixed-Use
 FL 1: Office/Retail
 FL 2-6: 87 Units

\$68M
4643 Lindell
 Mixed-Use
 12 Stories
 10k SF Ground FL Retail
 217 Units

\$9M
Optimist
 Commercial
 Renovation
 32,000 Square Feet

\$72M
The Orion
 Mixed-Use
 FL 1: Whole Foods
 FL 2-7: 177 Units

\$31M
32 Euclid
 Mixed-Use
 FL 1: 11K SF Retail
 FL 2: 10K SF Office
 FL 3-6: 60 Units





4528 Olive
Mixed-Use
 FL 1: 3K SF Commercial
 FL 2-4: 33 Units
\$6.5M

Alliance Petro
Mixed-Use
 Commercial
 FL 1: Office/Gas Station
\$1.5M

4101 West Pine
Mixed-Use
 13 Town-homes
 Planning Phase
\$5M

The Piazza
Residential
 4 Stories
 88 Units
\$7M

4101 Laclede
Mixed-Use
 Ground FL Retail
 53 Condos
 Planning Phase
\$16M

East of Cortex
Mixed-Use Development
 Rehab of Fed. Mogul Site
 14 Acres
 Planning Phase
\$232M

WU MC Washington University Medical Center
 Redevelopment Corporation

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Central West End

Employment Summary



Photo courtesy of Washington University School of Medicine in St. Louis

With over 34,000 jobs, the CWE is the region's second largest employment hub, behind only Downtown Saint Louis. Total employment in the CWE grew by 3,155 jobs between 2006 and 2014. At the center of this growth in employment are Cortex and the Washington University Medical Center.

34,032

Number of jobs located within the Central West End in 2014

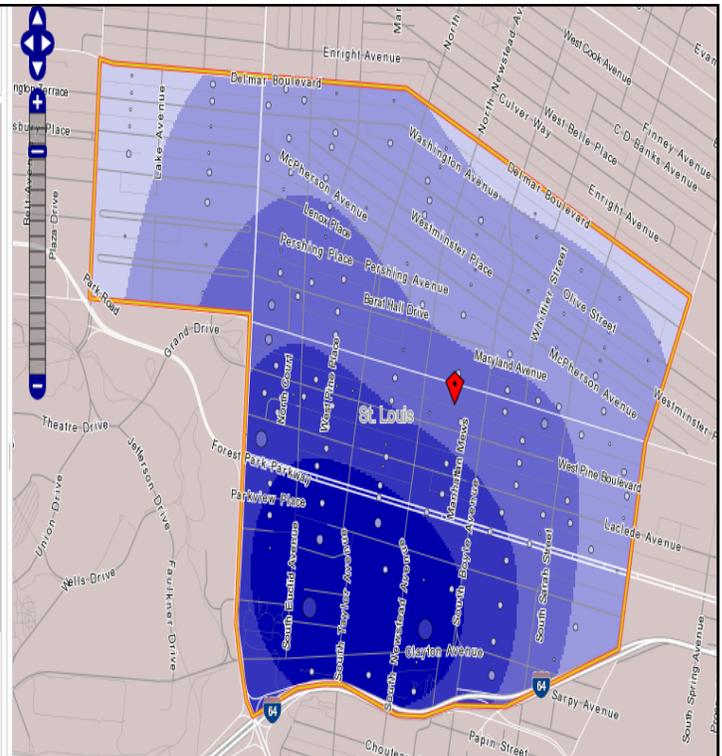
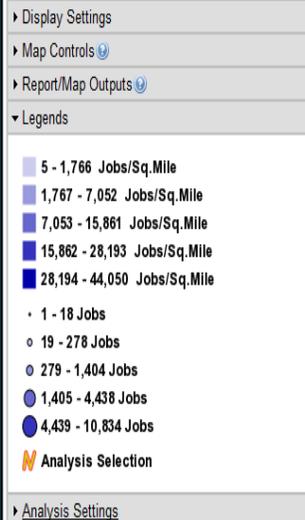
#2

The CWE stands as the 2nd largest employment center in the St. Louis region, behind only Downtown St. Louis

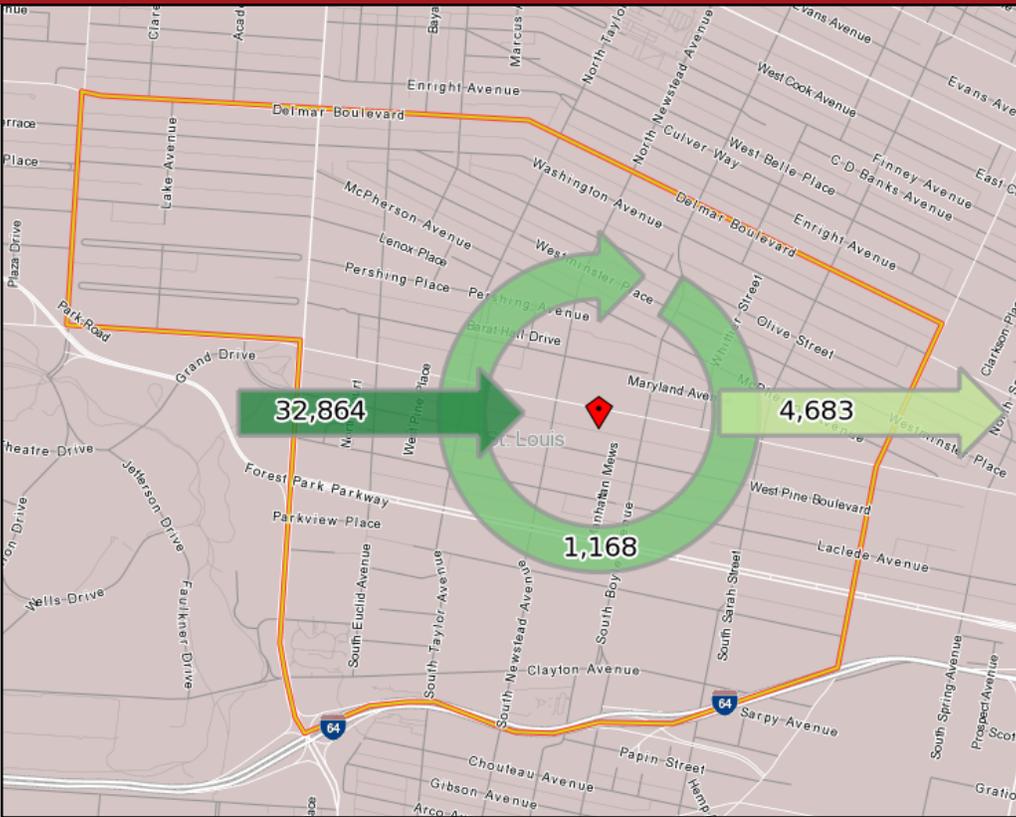
3,155

Net jobs added in the Central West End between the years 2006 to 2014

2014 Employment Density Central West End neighborhood



2014 Employment Inflow/Outflow



◇ Each day in 2014, 32,864 people commuted to work in the CWE from elsewhere in the St. Louis region

◇ 4,683 CWE residents commuted outside of the neighborhood for work

◇ 1,168 CWE residents lived and worked within the neighborhood

◇ The CWE had the largest percentage and total number of residents that lived and worked within its boundaries of any neighborhood in the St. Louis region



Washington University Medical Center

Together, the world class medical institutions of BJC Healthcare, St. Louis College of Pharmacy, and Washington University School of Medicine employ over 21,000 health professionals in the CWE at WUMC.

Cortex

The Cortex Innovation Community is home to over 200 firms, employing over 3,600 innovators in bioscience and technology research, development, and commercialization. Cortex hosts 5 Innovation Centers, including TechShop.

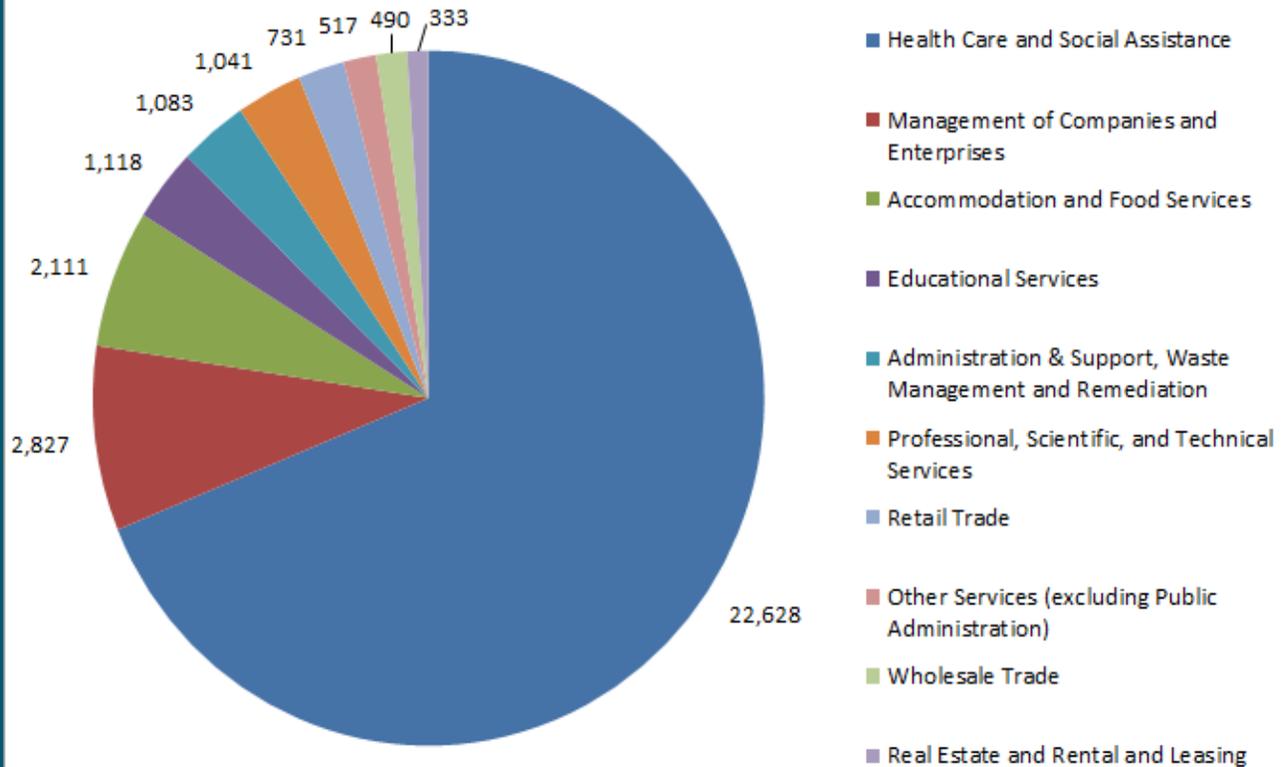


Photo courtesy of Cortex

Central West End

Employment Summary

Top Ten Economic Sectors by Employment, Central West End, 2014



67%

Of jobs in the CWE were in the Healthcare and Social Services sector

49%

Of jobs in the CWE earned an annual wage or salary above \$40k per year

78%

Increase in the number of jobs earning over \$40k per year from 2006 to 2014

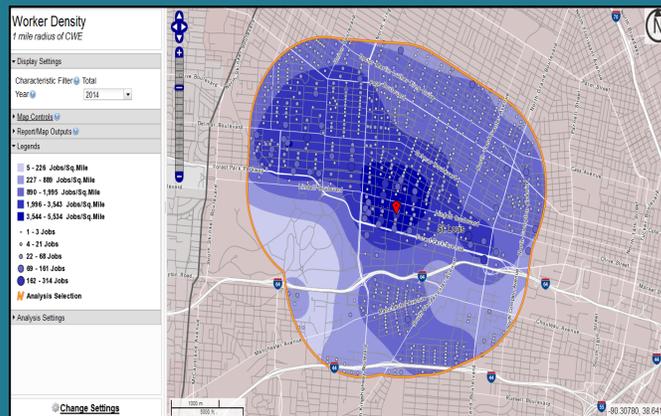
Total Jobs by Earning per Job, 2006 and 2014



Within 1 mile of the Central West End

While job growth is booming in the Central West End, part of the reason for that growth is the strength of the market surrounding the neighborhood:

- ◇ There were 65,840 jobs located within 1 mile of the CWE in 2014
- ◇ 3,796 residents lived and worked within 1 mile of the CWE. 15,014 residents travelled outside of the area for employment.
- ◇ 45.5% of the jobs located within 1 mile of the CWE earned more than \$40k per year
- ◇ 32.4% of employed residents in this area earned over \$40k per year
- ◇ 23% of employed residents age 30 or older had at least a Bachelor's degree level of education, better than regional average



Neighborhood Resident Labor Force Profile 2014

5,851

Total Employed Residents in the Central West End

2,980

Employed residents aged 30 to 54

2,874

Employed residents earning more than \$40k per year

31%

Of employed residents age 30 or older have a Bachelor's degree or higher level of education

Central West End

Community Infrastructure

What is Community Infrastructure?

Community Infrastructure includes the entities, partnerships and programs that serve as the long-term implementer, guardian, or funder of important neighborhood services, programs and projects. A great deal of the success of the Central West End neighborhood can be attributed to its rich and hardy community infrastructure. In the CWE, there are a host of community organizations and programs supporting the long-term viability of the neighborhood.

Special Business Districts:

The neighborhood is home to six special business districts (SBDs) that collect a local property tax used to enhance safety & security, beautification and public improvements throughout the neighborhood. Collectively these districts expend \$1.1 million on these activities annually. Currently, these districts cover about one third of the neighborhood. Efforts are currently underway for an additional SBD to cover the remainder of the neighborhood. These entities are governed by a local board of property and business owners as well as residents appointed by the mayor.

Community Improvement Districts:

The neighborhood is home to two community improvement districts (CIDs) located along Euclid Avenue. These districts, which collect a local sales tax, focus on marketing, public improvements, beautification and safety of the area. Collectively they expend \$1.1 million dollars annually on these activities. Efforts are currently underway to create addition districts along other commercial corridors within the neighborhood. These districts are governed by boards of property and business owners appointed by the mayor.

Neighborhood Organizations: The Central West End has a very involved resident population. The neighborhood is home to several neighborhood organizations. These volunteer based groups serve at the grassroots level providing critical feedback and ownership of a wide array of decisions about development, safety, public improvement, community services and beautification. These entities have been critical in ensuring that the community engagement process within the neighborhood stays consistent with and representative of the area’s needs.

Safety and Security: The neighborhood has one of the most sophisticated and innovative safety infrastructures in the region. In 2008, the special business districts, community improvement districts and Washington University Medical Center came together to create the Central West End Neighborhood Security Initiative.

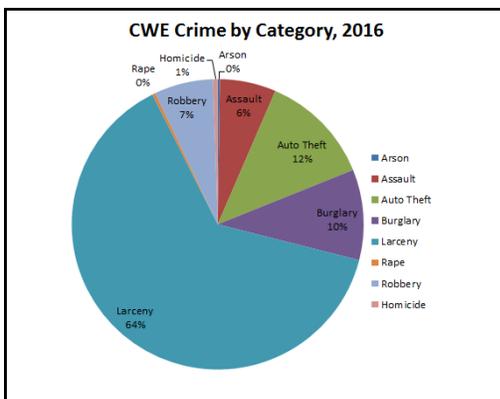
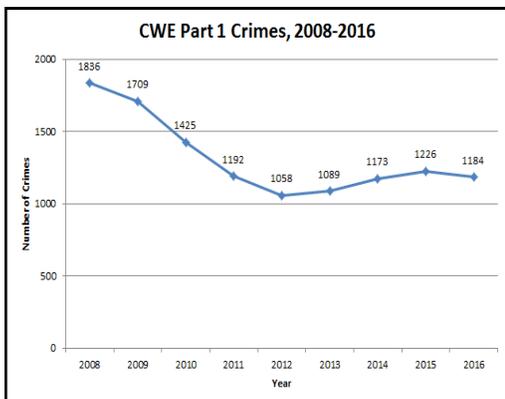
This new non-profit, governed by a board of its member institutions has pooled the collective resources of the community to reduce crime, enhance public safety and engage in innovative programming to ensure the long-term stabilization of the community. The CWE NSI coordinates off-duty security patrols throughout the neighborhood, implements a Court Advocacy program to ensure community input on sentencing and administers the Neighborhood Ownership Model to engage community residents around safety and security. The NSI recently installed security cameras in key areas throughout the neighborhood with plans for expansion of the program. All of this has resulted in overall crime reduction better than citywide averages since the inception of the CWE NSI.



Community Development:

The Central West End is also served by Park Central Development Corporation, which acts in a city-manager role for the community, handling the planning and implementation of:

- public improvements
- marketing
- comprehensive planning activities

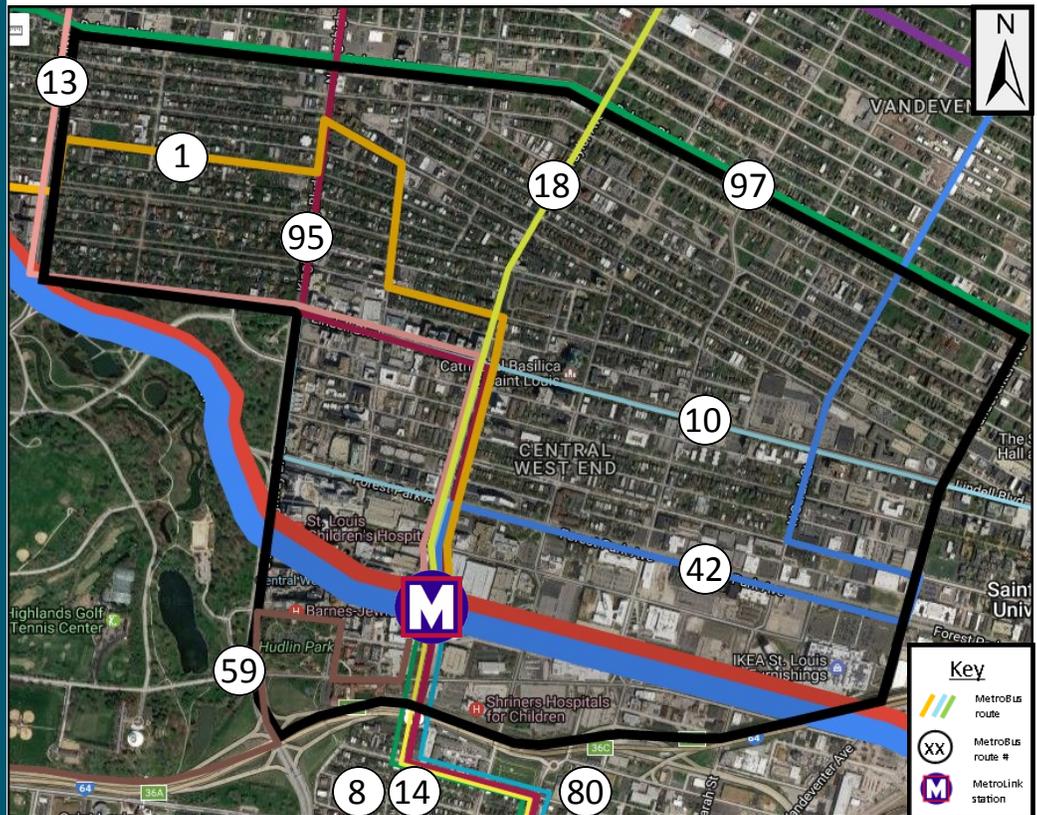


Central West End

Transportation

Located in the Central Corridor of the St. Louis region, the Central West End is highly accessible and prominently visible. Interstate 64 forms the southern border of the neighborhood, carrying over 120,000 vehicles per day, while Metro brings thousands of transit riders through the Central West End each day.

In 2013-2014, three overpasses above Interstate 64 were reconstructed and an additional interstate interchange was created to improve highway access into the neighborhood.



The neighborhood is served by transit better than perhaps anywhere in the region with light rail service from the Red and Blue MetroLink lines as well as 11 MetroBus lines, including the #1, #8, #10, #13, #14, #18, #42, #59, #80, #95, and #97 buses, many of which are routed through the Central West End MetroLink Station in the WUMC Campus. An additional MetroLink Station has been financed for construction at Boyle near Clayton Avenue to serve the growing Cortex Innovation Community, which is set to open in 2018.

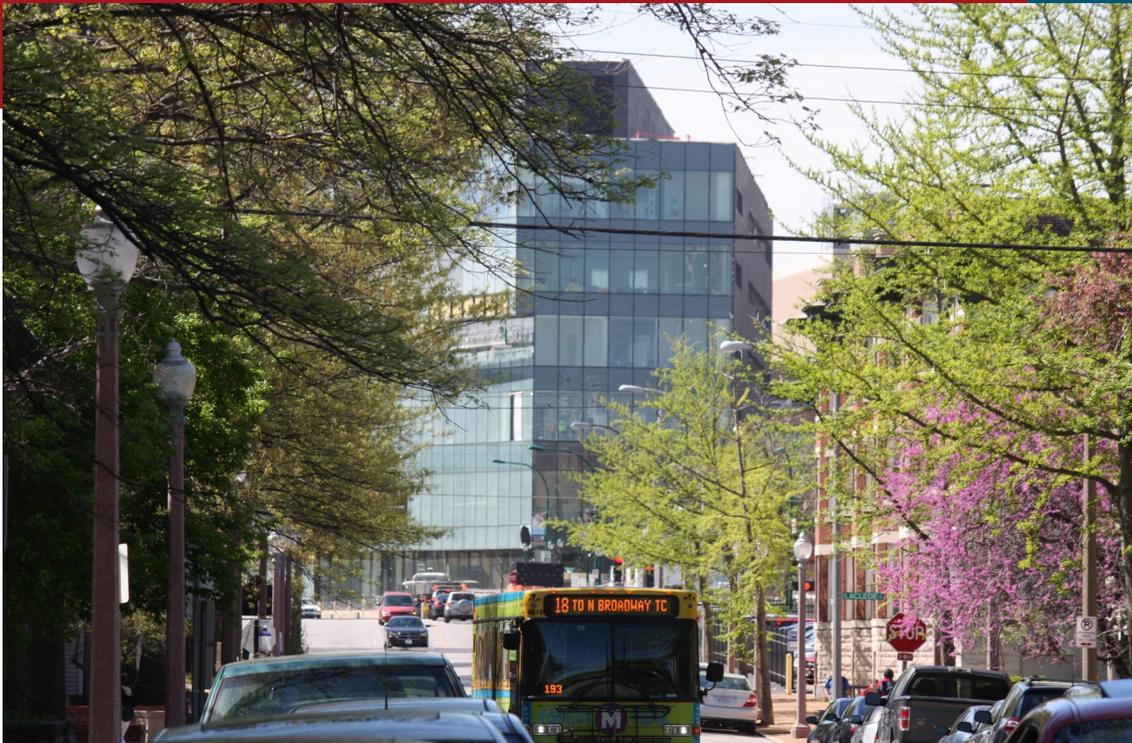


Data Sources

- 2010 U.S. Census
- 2014 5year American Community Survey (ACS)
- Geo St. Louis
- Park Central Development– Central West End Development Committee
- 2006 and 2014 U.S. Longitudinal Employer-Housing Dynamics survey
- St. Louis Metropolitan Police Department

Central West End

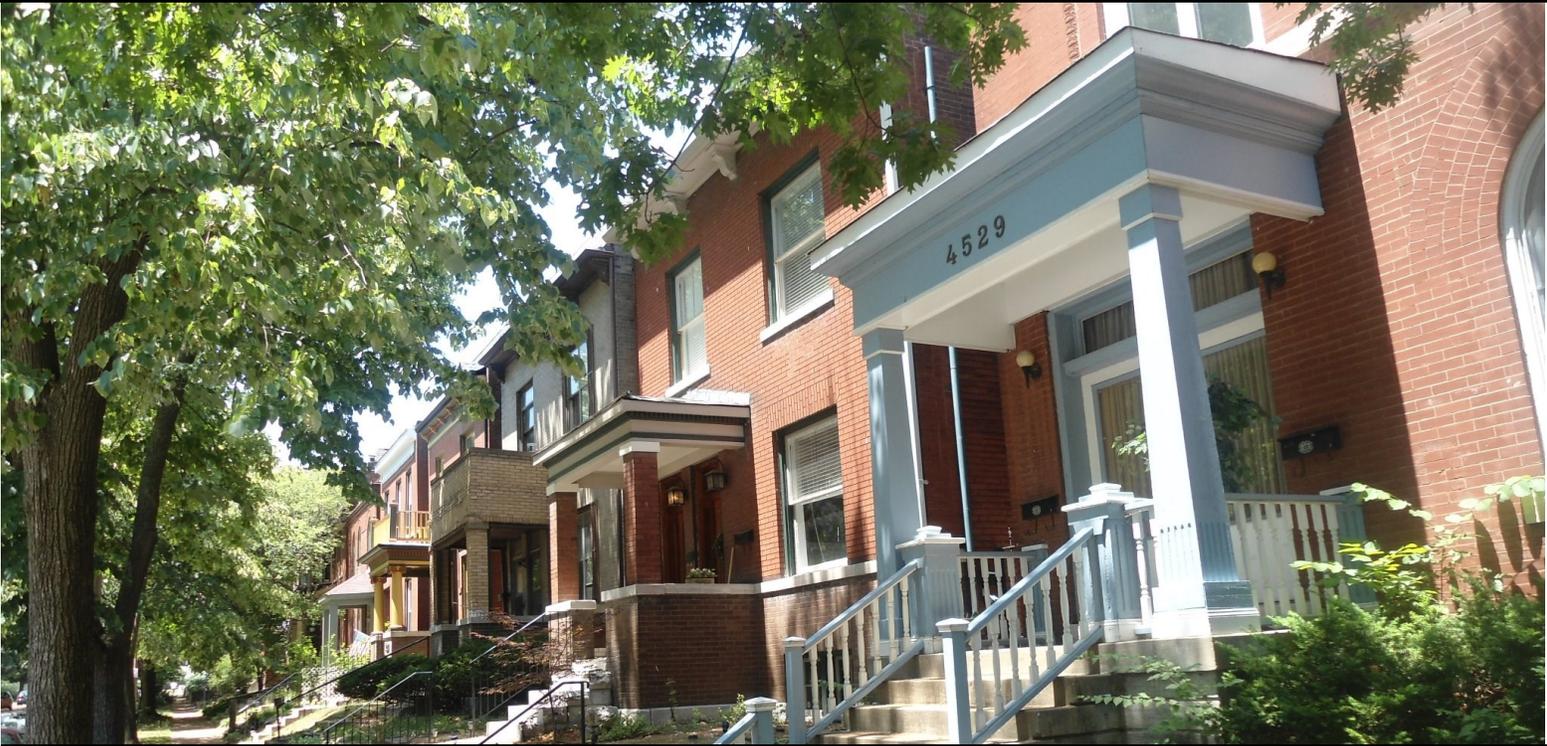






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