

**HOUSING AND ECONOMIC COMPARISONS**

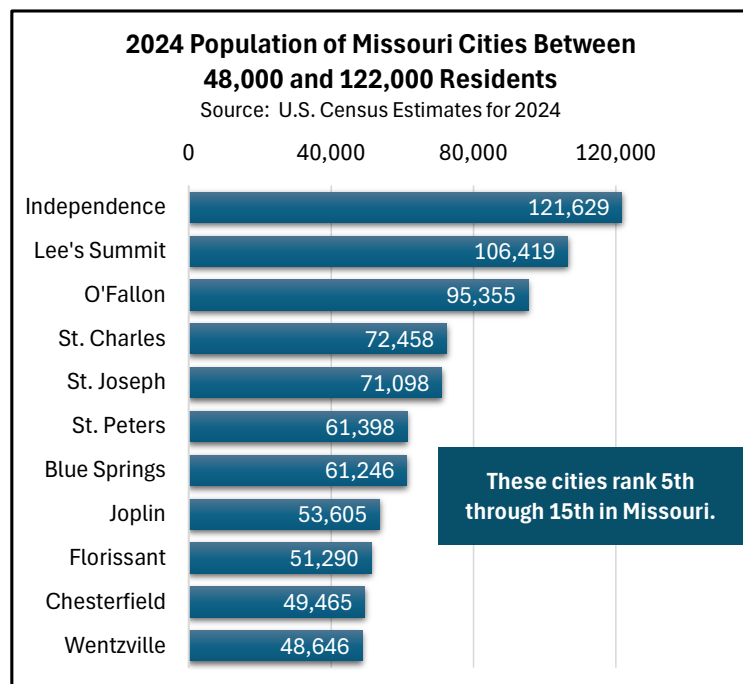
The following questions arose from joint meeting of Wentzville’s Board of Aldermen and it’s Planning and Zoning Commission:

What’s the split between residential, commercial, and industrial? Is there any information/metric about what successful communities between 50,000 and 100,000 population have as a split between these 3 broad categories? We have had several requests in the recent past to rezone commercial and industrial ground to residential. The 84% residential statistic seemed out of whack with other compared other cities. Is there a reason for this or should we take a closer look at what I driving this metric?

For ease of data collection and comparison, let’s just look at Missouri cities in the requested population range. It turns out that there are no precise break points at 50,000 and 100,000, so the 11 cities in the state that come close, while still including Wentzville, are shown on the graph.<sup>1</sup> Wentzville is the 15<sup>th</sup> most populated city in the state at not quite 50,000 residents as of mid-2024. But it could be at 50,000 by now!

Not shown are recent growth rates, to the degree that growth rates are indicative of changes in housing types and other land use factors.

Generally, however, Wentzville is a relatively rapidly growing city not unlike Lee’s Summit and Blue Springs in the Kansas City area. Within St. Charles County, the cities of St. Charles, St. Peters, and O’Fallon continue to grow but currently at very slow rates, though O’Fallon seems to be in an annexation mood. Independence, St. Joseph, Joplin, and Florissant have very stable populations. Chesterfield is no longer a fast-growing city, although it



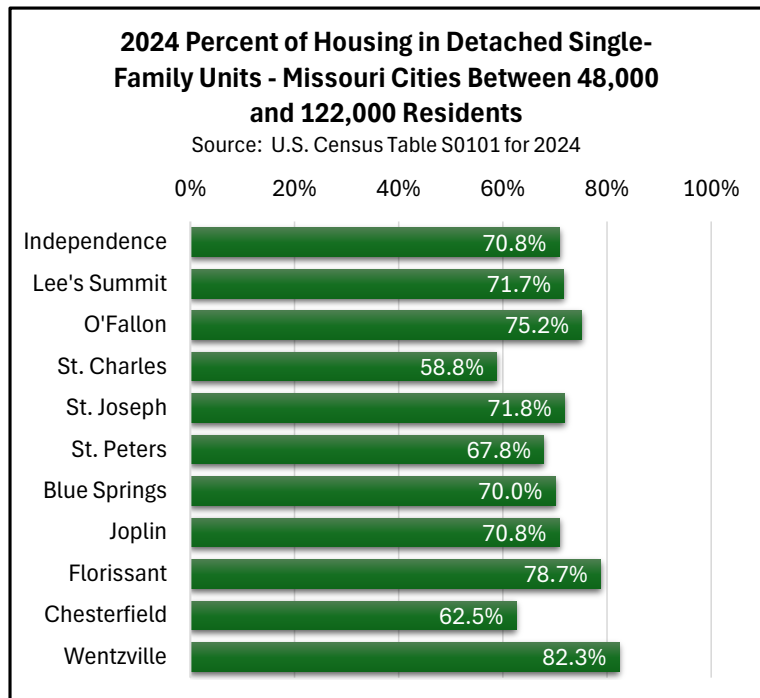
<sup>1</sup> These cities rank 5<sup>th</sup> through 15<sup>th</sup>, as shown. First is Kansas City with a population of 516,000 as of mid-2024, followed by St. Louis (280,000), Springfield (171,600), and Columbia (130,900). Independence was included on the graph because it is effectively a suburb of Kansas City. Wentzville ranks 15<sup>th</sup>, as shown, followed by Jefferson City (42,600) and Cape Girardeau (40,800).

reflects some large-scale land use shifts with the recent development of Chesterfield Valley and the current redevelopment of the Chesterfield Mall site.

All that said, the next graph indicates the extent of single-family, detached housing in each of these 11 cities. There is a broad range in terms of share of housing.

Wentzville leads the pack with over 82% single-family detached housing.

This actually is not surprising since expanding suburbs focus almost exclusively on such housing as they initially grow. Thus, over time, Wentzville might expect to create a higher share of non-single-family detached units as the city matures—perhaps, like its peers, dropping into the range of 70 percent single-family detached in the next couple of decades.



St. Peters and Chesterfield have reached below that threshold virtually by design. Each has long pursued a more diverse housing stock to attract and retain a wider range of household types, policies which remain evident today in the redevelopment of Chesterfield Mall's location and recent efforts in St. Peters to create denser housing in its core, policies which will likely extend into eventual redevelopment of the Mid-Rivers Mall site, based on draft ideas in the city's current land use planning process.

Shifting to shares of residential, commercial, and industrial land in each city, the bad news is that there is no comprehensive database for the amount of land devoted to various land uses. Instead, the following graphs rely on the distribution of jobs in each city that generally fit into these land use categories, with the addition of an office classification.

The first graph (red bars) shows the share of jobs in each of the 11 cities that are in "commercial" land uses.<sup>2</sup> It is apparent that there is a wide range, from as low as 16 percent in Chesterfield to a high of 43 percent in Florissant. In some ways, the low percent in Chesterfield can be surprising given the amount of retail space in the city, but keep in mind that Chesterfield has some 54,700 jobs in its borders, the largest share of which are in the city's

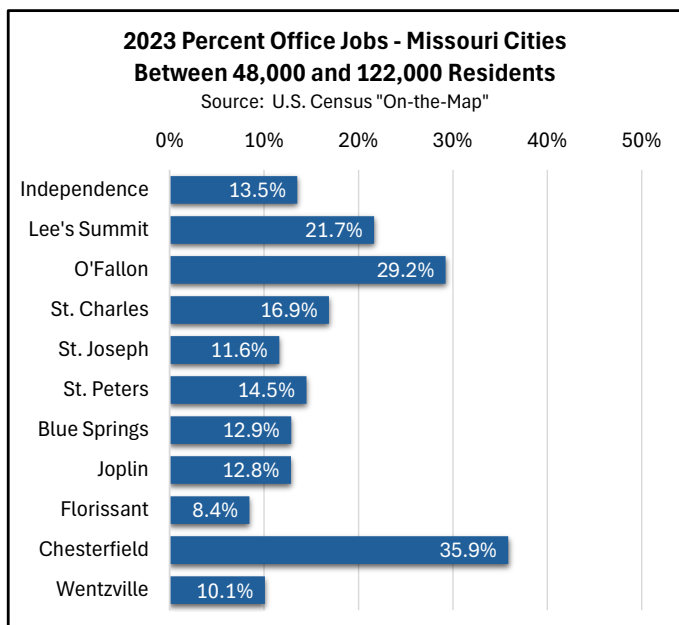
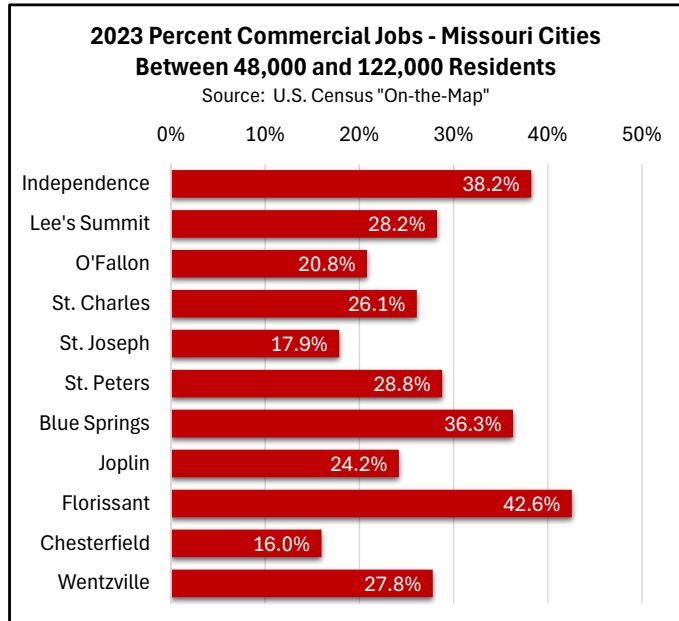
<sup>2</sup> In this case, jobs in retail sales, restaurants, and overnight lodging.

many office buildings. Florissant, on the other hand, has just 13,600 jobs where commercial jobs are almost the highest share (“all other” actually wins out slightly).<sup>3</sup>

The message seems to be that the share of commercial jobs and, by extension, commercial land, varies widely depending on the other economic strengths or weaknesses of particular cities.

The next graph (blue bars) is indicative of the amount of jobs and land devoted to the office sector.<sup>4</sup> Here, Chesterfield dominates with major strengths in corporate headquarters. Other than O’Fallon and, possibly, Lee’s Summit, office jobs are relatively small components of the economies of the subject cities. Presumably, this means low shares of land devoted to office buildings.<sup>5</sup> The office market is clearly not a huge factor in Wentzville—yet?—which ranks 10<sup>th</sup> of the 11 cities in office-related jobs.

Finally, the next graph (gray bars) illustrates the scale of industrial jobs in each city.<sup>6</sup>



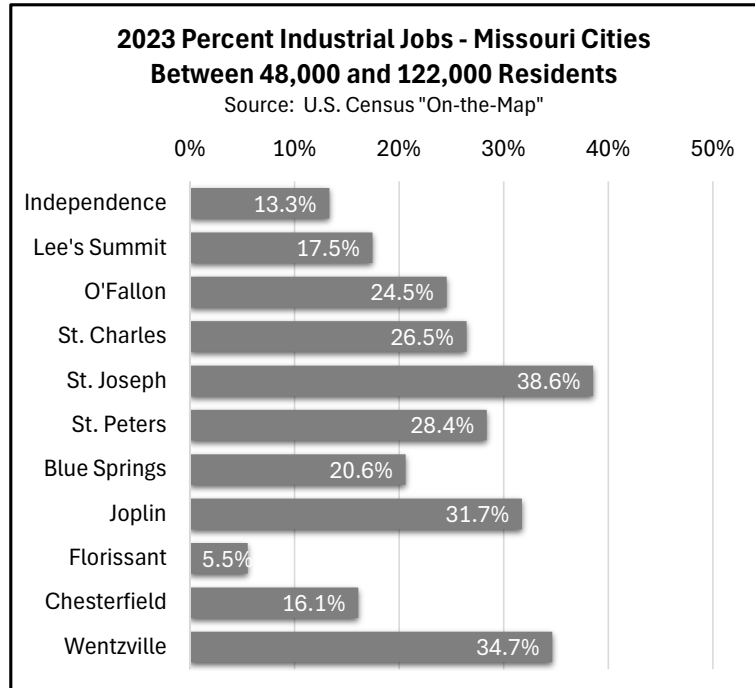
<sup>3</sup> All Other includes the economic sectors of arts and entertainment; health care and social assistance; agriculture; public administration; and other non-public services.

<sup>4</sup> Includes jobs in the following major sectors: information; finance and insurance; real estate and rental and leasing; professional, scientific, and technical services; management of companies and enterprises; and administration and support, waste management and remediation.

<sup>5</sup> Again, keep in mind these are observations generalized from job data, not land use data. For instance, many office jobs are found in otherwise retail locations.

<sup>6</sup> The industrial category includes the economic sectors of utilities; construction; manufacturing; wholesale trade; and transportation and warehousing.

From an employment and, probably, a land use perspective, Wentzville is an industrial city. Over a third of the jobs in Wentzville are considered industrial. Only St. Joseph, long an industrial center in northwest Missouri, has a higher share of industrial jobs, though Joplin is not far behind. But St. Joe has only 18 percent of jobs in commercial sectors compared to Wentzville's almost 28 percent. Wentzville might actually be a better-balanced economy than the much older St. Joseph. St. Joe has only about 11 percent office jobs, very close to Wentzville's ten percent.



Florissant, in St. Louis County, has only a very small share of industrial jobs but a very large share of commercial jobs. This does not mean, however, that there is a dearth in industrial jobs or land in Northwest St. Louis County. Florissant's neighbors of Bridgeton and Hazelwood, for instance, have high concentrations of industrial land and jobs. As it turns out, Florissant is more of the commercial, though not office, center of Northwest County while Hazelwood and Bridgeton make up the industrial concentration. Maryland Heights makes up a huge component of the office market. Taken together, these four cities with a combined balance of economic sectors and, presumably, land uses have a population of about 115,200, just under Independence.

This latter point is crucial. Not each city needs to have a consistent balance in housing, economics, or land uses. Some cities specialize in ways that others do not, yet nearby cities can rely on one another for a collection of diverse housing, economic, and land use alternatives that serve a larger "hinterland" of urban and suburban lifestyles.