A Strategic Assessment of St. Louis: Growth and Equity

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St. Louis Growth and Equity Analysis

- Review success of the St. Louis region and City compared to 14 peer regions on growth and equity
- 2016 and change over time 2000-2016
- Data analyzed on three scales:
  - MSA
  - City
  - Corridors within the City of St. Louis
St. Louis Growth and Equity Analysis

Focused on demographic indicators for growth and equity:

- Population
- Educational Attainment
- Educational Attainment for White and African American
- Per Capita Income
- Per Capita Income Differential between White and African-American
Regions

- Atlanta
- Baltimore
- Chicago
- Cincinnati
- Cleveland
- Columbus
- Denver
- Detroit
- Indianapolis
- Kansas City
- Milwaukee
- Minneapolis
- Nashville
- Pittsburgh
St. Louis Region

St. Louis Metropolitan Statistical Area 2010

Note: The portion of the City of Sullivan in Crawford County, Missouri, is legally part of the St. Louis, MO-IL MSA, though not shown on this map.

Source: U.S. Census Bureau
St. Louis Region (2016)

- Population: 2,803,449
- Racial Composition: 74.2% White, 18.2% Black, 2.9% Hispanic, 4.8% Other (Asian, Pacific Island, Native American)
- % Population 18-34: 22.6%
- % Population over 25 with a Bachelors or Higher: 32.6%
- Per Capita Income: $31,322
- Per Capita Income by Race: White: $33,267; Black: $18,261
- White/Black Income Ratio: 91.3%
- Median House Value: $159,500
- Median Monthly Housing Costs: $943
STL Region (2016) - Population

<table>
<thead>
<tr>
<th>City</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milwaukee</td>
<td>1,571,730</td>
</tr>
<tr>
<td>Nashville</td>
<td>1,794,570</td>
</tr>
<tr>
<td>Indianapolis</td>
<td>1,968,768</td>
</tr>
<tr>
<td>Columbus</td>
<td>1,995,004</td>
</tr>
<tr>
<td>Cleveland</td>
<td>2,061,630</td>
</tr>
<tr>
<td>Kansas City</td>
<td>2,070,147</td>
</tr>
<tr>
<td>Cincinatti</td>
<td>2,146,410</td>
</tr>
<tr>
<td>Pittsburgh</td>
<td>2,354,926</td>
</tr>
<tr>
<td>Denver</td>
<td>2,752,056</td>
</tr>
<tr>
<td>Baltimore</td>
<td>2,780,873</td>
</tr>
<tr>
<td>St. Louis</td>
<td>2,803,449</td>
</tr>
<tr>
<td>Minneapolis</td>
<td>3,488,436</td>
</tr>
<tr>
<td>Detroit</td>
<td>4,296,731</td>
</tr>
<tr>
<td>Atlanta</td>
<td>5,612,777</td>
</tr>
<tr>
<td>Chicago</td>
<td>9,528,396</td>
</tr>
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</table>
STL Region (2016) – Race/Ethnicity

<table>
<thead>
<tr>
<th>Location</th>
<th>Other</th>
<th>Hispanic</th>
<th>Black</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pittsburgh</td>
<td>1.6%</td>
<td>9.7%</td>
<td>6.8%</td>
<td>86.1%</td>
</tr>
<tr>
<td>Cincinnati</td>
<td>2.9%</td>
<td>7.6%</td>
<td>5.6%</td>
<td>80.4%</td>
</tr>
<tr>
<td>Minneapolis</td>
<td>4.5%</td>
<td>2.9%</td>
<td>5.1%</td>
<td>77.1%</td>
</tr>
<tr>
<td>Columbus</td>
<td>3.8%</td>
<td>14.7%</td>
<td>18.2%</td>
<td>74.7%</td>
</tr>
<tr>
<td>St. Louis</td>
<td>8.1%</td>
<td>1.6%</td>
<td>14.7%</td>
<td>74.2%</td>
</tr>
<tr>
<td>Indianapolis</td>
<td>4.8%</td>
<td>6.4%</td>
<td>3.3%</td>
<td>73.8%</td>
</tr>
<tr>
<td>Kansas City</td>
<td>3.3%</td>
<td>3.7%</td>
<td>8.7%</td>
<td>73.3%</td>
</tr>
<tr>
<td>Nashville</td>
<td>5.0%</td>
<td>6.8%</td>
<td>12.4%</td>
<td>73.2%</td>
</tr>
<tr>
<td>Cleveland</td>
<td>4.3%</td>
<td>5.3%</td>
<td>15.1%</td>
<td>70.7%</td>
</tr>
<tr>
<td>Milwaukee</td>
<td>5.9%</td>
<td>10.2%</td>
<td>16.4%</td>
<td>67.6%</td>
</tr>
<tr>
<td>Detroit</td>
<td>6.4%</td>
<td>4.2%</td>
<td>22.3%</td>
<td>67.1%</td>
</tr>
<tr>
<td>Denver</td>
<td>6.9%</td>
<td>22.8%</td>
<td>5.4%</td>
<td>58.1%</td>
</tr>
<tr>
<td>Baltimore</td>
<td>8.0%</td>
<td>5.3%</td>
<td>28.6%</td>
<td>53.7%</td>
</tr>
<tr>
<td>Chicago</td>
<td>8.1%</td>
<td>21.6%</td>
<td>16.6%</td>
<td>32.9%</td>
</tr>
<tr>
<td>Atlanta</td>
<td>7.8%</td>
<td>10.4%</td>
<td>32.9%</td>
<td>48.8%</td>
</tr>
<tr>
<td>United States</td>
<td>8.6%</td>
<td>17.3%</td>
<td>12.3%</td>
<td>62.0%</td>
</tr>
</tbody>
</table>

Shown by largest percent White for comparison

Other: Asian, Island Pacific, Native American, Two or more races
STL Region (2016) – White* Per Capita Income

* White Alone, Not Hispanic or Latino
STL Region (2016) – Black* Per Capita Income

* Black or African American Alone
STL Region (2016) – Per Capita Income Ratio

The percent difference between white and black per capita incomes

- Nashville: 62%
- Indianapolis: 75%
- Baltimore: 76%
- Columbus: 76%
- Pittsburgh: 77%
- Atlanta: 81%
- Cincinnati: 82%
- Detroit: 84%
- Denver: 89%
- Kansas City: 92%
- St. Louis: 97%
- Cleveland: 102%
- Chicago: 115%
- Minneapolis: 140%
- Milwaukee: 145%
- U.S.: 77%
St. Louis Region, Change Over Time (2000-2016)

- Population: Grew by 5.9%

- Change in Race/Ethnicity: Very slight increases in white and black populations. Doubled the % population of Hispanic, although still a small percent (2.9%) of the overall population.

- % Population Age 18-34: No significant change in % of population aged 18-34

- Educational Attainment: In 2000, 25% of the population over 25 with a Bachelors or Higher, in 2016 the % increased to 32.6%.

- Per Capita Income: Decrease by 3.6% (2016 adjusted)

- Per Capita Income by Race: White: Increase by 2.7%, Black: Decrease by 6.8% (2016 adjusted)

- Change in White/Black PCI Ratio: 23% Increase in the PCI gap
St Louis Region: (2000-2016) - % Change in Per Capita Income
(In 2016 Adjusted Dollars)

-16.1%
-15.1%
-11.9%
-8.4%
-6.6%
-6.4%
-6.3%
-5.7%
-4.9%
-4.3%
-3.2%
-0.7%
5.2%
6.0%
6.2%

-16.1% Detroit
-15.1% Atlanta
-11.9% Indianapolis
-8.4% Cleveland
-6.6% Columbus
-6.4% Cincinnati
-6.3% Milwaukee
-5.7% Nashville
-4.9% Chicago
-4.3% Denver
-3.2% Minneapolis
-0.7% St. Louis
5.2% U.S.
St Louis Region: (2000-2016) - % Change in White* Per Capita Income (In 2016 Adjusted Dollars)

-14.5%
-8.6%
-7.6%
-5.1%
-2.8%
-2.5%
-2.4%
-1.5%
0.2%
0.5%
2.0%
2.7%
7.6%
9.4%
11.4%

U.S. -0.9%

Kansas City
Baltimore
Pittsburgh
St. Louis
Minneapolis
Denver
Chicago
Milwaukee
Cincinnati
Columbus
Nashville
Cleveland
Indianapolis
Atlanta
Detroit

White alone, not including Hispanic
<table>
<thead>
<tr>
<th>City</th>
<th>% Change</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>-3.4%</td>
<td></td>
</tr>
<tr>
<td>St. Louis</td>
<td>-6.8%</td>
<td></td>
</tr>
<tr>
<td>Kansas City</td>
<td>-3.6%</td>
<td></td>
</tr>
<tr>
<td>Detroit</td>
<td>-10.8%</td>
<td></td>
</tr>
<tr>
<td>Milwaukee</td>
<td>-11.6%</td>
<td></td>
</tr>
<tr>
<td>Atlanta</td>
<td>-14.9%</td>
<td></td>
</tr>
<tr>
<td>Denver</td>
<td>-15.0%</td>
<td></td>
</tr>
<tr>
<td>Cincinnati</td>
<td>-17.4%</td>
<td></td>
</tr>
<tr>
<td>Minneapolis</td>
<td>-18.0%</td>
<td></td>
</tr>
<tr>
<td>Pittsburgh</td>
<td>-18.0%</td>
<td></td>
</tr>
<tr>
<td>Baltimore</td>
<td>-20.4%</td>
<td></td>
</tr>
<tr>
<td>Indianapolis</td>
<td>-20.0%</td>
<td></td>
</tr>
</tbody>
</table>

Black alone, not including Hispanic
St Louis Region: (2000-2016) - % Change in the Ratio Between White PCI and Black PCI (In 2016 Adjusted Dollars)

- U.S.: 6%
- Nashville: -4%
- Baltimore: -1%
- Atlanta: 6%
- Chicago: 12%
- Milwaukee: 16%
- Detroit: 18%
- Pittsburgh: 21%
- St. Louis: 23%
- Cincinnati: 29%
- Cleveland: 34%
- Denver: 35%
- Indianapolis: 35%
- Kansas City: 39%
- Minneapolis: 39%
- Columbus: 42%
St. Louis City (2016)

- Population: 316,030
- Racial Composition: White: 42.7%, Black: 47.8%, Hispanic: 3.9%, Other: 5.5%
- % Population Age 18-34: 30%
- % Population over 25 with a Bachelors or Higher: 33%
- Per Capita Income: $26,040
- Per Capita Income by Race: White: $37,617; Black: $15,930
- Difference between White and Black Per Capita Income: 136.1%
- Median House Value: $123,780
- Median Monthly Housing Costs: $810
The City of St. Louis represents 11.3% of the St. Louis Region's population.
St. Louis City (2016) – Racial Composition

- **White**
  - Comparison: 64.4% to 42.7%
- **Black**
  - Comparison: 8.7% to 12.3%
- **Hispanic**
  - Comparison: 24.0% to 27.6%
- **Other**
  - Comparison: 6.4% to 17.3%

Other: Asian, American Indian, Pacific Islander, Two or More Races

Shown by largest percent White for comparison

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Other: Asian, American Indian, Pacific Islander, Two or More Races
St. Louis City (2016) - Per Capita Income

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>Per Capita Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Atlanta</td>
<td>$39,608</td>
</tr>
<tr>
<td>2</td>
<td>Denver</td>
<td>$37,488</td>
</tr>
<tr>
<td>3</td>
<td>Minneapolis</td>
<td>$34,288</td>
</tr>
<tr>
<td>4</td>
<td>Chicago</td>
<td>$31,582</td>
</tr>
<tr>
<td>5</td>
<td>Nashville</td>
<td>$30,128</td>
</tr>
<tr>
<td>6</td>
<td>Pittsburgh</td>
<td>$29,892</td>
</tr>
<tr>
<td>7</td>
<td>Kansas City</td>
<td>$29,190</td>
</tr>
<tr>
<td>8</td>
<td>Baltimore</td>
<td>$29,190</td>
</tr>
<tr>
<td>9</td>
<td>Cincinnati</td>
<td>$27,775</td>
</tr>
<tr>
<td>10</td>
<td>Columbus</td>
<td>$26,395</td>
</tr>
<tr>
<td>11</td>
<td>St. Louis</td>
<td>$26,040</td>
</tr>
<tr>
<td>12</td>
<td>Indianapolis</td>
<td>$26,040</td>
</tr>
<tr>
<td>13</td>
<td>Milwaukee</td>
<td>$25,692</td>
</tr>
<tr>
<td>14</td>
<td>Cleveland</td>
<td>$21,121</td>
</tr>
<tr>
<td>15</td>
<td>Detroit</td>
<td>$18,432</td>
</tr>
<tr>
<td>16</td>
<td>Detroit</td>
<td>$15,933</td>
</tr>
<tr>
<td>17</td>
<td>U.S.</td>
<td>$29,829</td>
</tr>
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</table>
St. Louis City (2016) – White* Per Capita Income

<table>
<thead>
<tr>
<th>City</th>
<th>Per Capita Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlanta</td>
<td>$68,269</td>
</tr>
<tr>
<td>Baltimore</td>
<td>$44,194</td>
</tr>
<tr>
<td>Minneapolis</td>
<td>$43,529</td>
</tr>
<tr>
<td>Chicago</td>
<td>$42,989</td>
</tr>
<tr>
<td>Denver</td>
<td>$41,943</td>
</tr>
<tr>
<td>St. Louis</td>
<td>$37,617</td>
</tr>
<tr>
<td>Cincinnati</td>
<td>$36,629</td>
</tr>
<tr>
<td>Kansas City</td>
<td>$35,935</td>
</tr>
<tr>
<td>Nashville</td>
<td>$35,713</td>
</tr>
<tr>
<td>Pittsburgh</td>
<td>$35,281</td>
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<tr>
<td>Columbus</td>
<td>$31,218</td>
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<td>Indianapolis</td>
<td>$30,968</td>
</tr>
<tr>
<td>Milwaukee</td>
<td>$28,636</td>
</tr>
<tr>
<td>Cleveland</td>
<td>$24,924</td>
</tr>
<tr>
<td>Detroit</td>
<td>$19,329</td>
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</tbody>
</table>
| U.S.        | $35,457           

White only, Hispanic not Included
St. Louis City (2016) – Per Capita Income Ratio

The percent difference between white and black per capita incomes
St. Louis City, Change Over Time, 2000-2016

- Population: 9.2% population loss
- Racial Composition: Decline in both white and black populations with very slight increases in Hispanic, Asian, Island Pacific, and two or more races
- Population shift: 14.5% increase in 18-34 year olds as a percentage of total population
- Education: In 2000, 19.1% of the population over 25 had a Bachelors Degree or more, in 2016, 33% of the City’s population over 25 had a Bachelors Degree or more
- Per Capita Income: 9.6% increase
- Per Capita Income by Race: 13.7% increase in white PCI, 5.3% decrease in black PCI
- Income Gap: 53.9% increase in the difference between white PCI and black PCI between 2000-2016
St. Louis City (2000-2016) - % Change in Population

-28.2% Detroit
-18.7% Cleveland
-10.0% Cincinnati
-9.2% St. Louis
-8.7% Pittsburgh
-6.3% Chicago
-4.6% Baltimore
0.3% Milwaukee
5.8% Minneapolis
6.8% Kansas City
8.3% Indianapolis
9.6% Atlanta
17.6% Columbus
18.0% Nashville
19.6% Denver
13.2% U.S.
<table>
<thead>
<tr>
<th>City</th>
<th>% Change in Per Capita Income (In 2016 Adjusted Dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>-4.1%</td>
</tr>
<tr>
<td>Baltimore</td>
<td>10.9%</td>
</tr>
<tr>
<td>St. Louis</td>
<td>9.6%</td>
</tr>
<tr>
<td>Pittsburgh</td>
<td>7.7%</td>
</tr>
<tr>
<td>Chicago</td>
<td>6.1%</td>
</tr>
<tr>
<td>Denver</td>
<td>5.4%</td>
</tr>
<tr>
<td>Atlanta</td>
<td>4.2%</td>
</tr>
<tr>
<td>Minneapolis</td>
<td>2.5%</td>
</tr>
<tr>
<td>Kansas City</td>
<td>-4.7%</td>
</tr>
<tr>
<td>Nashville</td>
<td>-7.2%</td>
</tr>
<tr>
<td>Cincinnati</td>
<td>-9.1%</td>
</tr>
<tr>
<td>Milwaukee</td>
<td>-11.5%</td>
</tr>
<tr>
<td>Columbus</td>
<td>-12.5%</td>
</tr>
<tr>
<td>Cleveland</td>
<td>-12.6%</td>
</tr>
<tr>
<td>Indianapolis</td>
<td>-19.5%</td>
</tr>
<tr>
<td>Detroit</td>
<td>-26.6%</td>
</tr>
</tbody>
</table>
St. Louis City (2000-2016) - % Change in White* Per Capita Income (In 2016 Adjusted Dollars)

-24.4%  Detroit
-14.1%  Indianapolis
-8.4%   Atlanta
-8.3%   Milwaukee
-7.7%   Columbus
-7.0%   Cleveland
-6.8%   Nashville
-3.6%   Cincinnati
-3.5%   Denver
-3.0%   Kansas City
-0.1%   Chicago
  3.1%   Minneapolis
  9.7%   Pittsburgh
 16.8%   St. Louis
 19.2%   Baltimore
  0.1%   U.S.
St. Louis City (2000-2016) - % Change in Black* Per Capita Income (In 2016 Adjusted Dollars)

-27.2%  
-21.2%  
-19.7%  
-18.7%  
-18.3%  
-16.8%  
-11.0%  
-9.9%  
-8.2%  
-6.8%  
-5.5%  
-4.0%  
-3.4%  
0.2%  
2.1%  
3.8%  
4.0%  
5.5%  
6.8%  
8.2%  
11.0%  
16.8%  
18.3%  
18.7%  
19.7%  
21.2%  
27.2%  

Detroit  
Indianapolis  
Cleveland  
Columbus  
Atlanta  
Chicago  
Minneapolis  
Baltimore  
Pittsburgh  
Nashville  
St. Louis  
U.S.
Data analyzed by census tract and grouped into five “Districts” of the City of St. Louis:

1. North City
2. North Central Corridor
3. Central Corridor
4. South Central Corridor
5. South City
Racial Composition by District, 2016

Central Corridor: 22,731 White, 22,001 Other
North Central Corridor: 28,121 White, 5,727 Other
South Central Corridor: 8,745 White, 14,266 Other
North City Tracts: 1,499 White, 1,408 Other, 1,817 Other
South City Tracts: 48,732 White, 38,079 Other, 12,230 Other

Note, Hispanic not analyzed separate, included in White or Other
Percent Change in Population by District, 2000-2016

- Central Corridor: 34.1%
- North Central Corridor: -11.7%
- South Central Corridor: -21.8%
- North City Tracts: -35.3%
- South City Tracts: -8.5%
Percent Change in Racial Groups by District, 2000-2016

North Central Corridor:
- White: 41.9%
- Black: -6.3%
- Other: 48.1%
- Percent Change: -11.3%

South Central Corridor:
- White: 32.3%
- Black: -30.7%
- Other: 37.8%
- Percent Change: -14.3%

Central Corridor:
- White: 18.6%
- Black: 18.6%
- Other: 18.6%
- Percent Change: 18.6%

North City Tracts:
- White: 0.4%
- Black: -14.3%
- Other: 18.6%
- Percent Change: -5.3%

South City Tracts:
- White: 22.3%
- Black: -8.3%
- Other: 18.6%
- Percent Change: 18.6%

Other: Asian, Island Pacific, Native American, Two or more races
Per Capita Income and % Change, (2016 USD), 2000-2016

<table>
<thead>
<tr>
<th>Tracts</th>
<th>2000</th>
<th>2016</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Corridor</td>
<td>$29,957</td>
<td>$33,863</td>
<td>13.0%</td>
</tr>
<tr>
<td>North Central Corridor</td>
<td>$18,554</td>
<td>$18,826</td>
<td>1.46%</td>
</tr>
<tr>
<td>South Central Corridor</td>
<td>$25,856</td>
<td>$35,179</td>
<td>36.0%</td>
</tr>
<tr>
<td>North City Tracts</td>
<td>$17,615</td>
<td>$14,749</td>
<td>-16%</td>
</tr>
<tr>
<td>South City Tracts</td>
<td>$25,066</td>
<td>$26,401</td>
<td>5.3%</td>
</tr>
</tbody>
</table>
Regional Conclusions

- Per capita income is average and housing costs are lower than average compared to peer regions. Leads to higher real wage.
- Incomes declined much less from 2000-2016 than in most regions
- Population growing very slowly. A 5.9% population growth and during the same time the U.S. saw a 13.2% population increase.
- Large gaps between black and white per capita incomes that grew between 2000-2016
City Conclusions

- Per Capita Income is below average
- Dramatic and growing difference in black and white per capita incomes
- Continue to lose population, albeit slowly
- All growth occurring in the Central Corridor
- Large geographic area in North St. Louis of greater than 50,000 residents whose economic condition is very poor and getting poorer
Opportunities and Conclusions

• PCI and cost of living data argues that St. Louis is an attractive place to live and should be an attractive place for firms to locate.

• The central corridor of the City is becoming a magnet for the white college educated 18-34 year olds.

• Slow population growth in region and city suggest St. Louis is becoming a less important region, with a weaker ability to attract national amenities and airline hubs.

• Sharp gaps in per capita income by race are morally indefensible, lower long-term economic growth, and set the stage for large-scale social disruption.