

A full-page photograph of a man running on a city street. He is shirtless, wearing dark shorts and running shoes, with a music player on his chest and earbuds. The Gateway Arch is visible in the background under a clear sky.

# HUSTLE

FROM DAY ONE

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## **Letters of Support**





## OFFICE OF THE GOVERNOR

207 STATE HOUSE  
SPRINGFIELD, ILLINOIS 62706

**BRUCE RAUNER**  
GOVERNOR

October 16, 2017

Re: St. Louis MSA Bid for Amazon HQ2

Dear Amazon:

As the Governor of Illinois, I am writing to express my support of the St. Louis MSA bid for HQ2. I believe that this unique site, crossing the beautiful Mississippi River and spanning two states, would be a great home for this exciting next phase of Amazon's remarkable legacy.

Illinois offers a vibrant business community, an educated and skilled workforce, infrastructure that facilitates the seamless movement of goods and people, and strong support for investment and growth.

As one of the largest and most diverse economies in the United States, and the 17<sup>th</sup> largest economy in the world, Illinois draws companies from a diverse range of industries. 37 Fortune 500 companies are headquartered in Illinois.

Our state's culture of ingenuity and innovation attracts the nation's brightest minds. With nearly a fourth of the state's working-age population completing postsecondary education, Illinois is one of the most educated populations in the Midwest. The St. Louis region is also home to one of the largest STEM workforces in the country, with more than 80,000 employed in these highly specialized occupations. Additionally, Scott Air Force Base, located in Illinois just 25 miles east of St. Louis, employs close to 13,000 people and operates state-of-the-art cybersecurity squadrons that are a magnet for IT and cybersecurity talent.

This region, in addition to world-class educational institutions, an exceptional talent pool and access to multiple transportation systems, offers residents a high quality of life. The region boasts multiple museums, parks like the World Heritage Sites at Cahokia Mounds, miles of bi-state bike and nature trails, the St. Louis Symphony, the Missouri Botanical Garden, and Professional and Minor League sports teams including the St. Louis Cardinals (MLB) and the St. Louis Blues (NHL).

With our many great advantages and assets, the Illinois / Greater St. Louis area is a strong option for the location of your second headquarters.

I look forward to working with you and Governor Greitens, along with state officials from Missouri and Illinois, and local partners from across the St. Louis area, to make this project as successful as possible should it move forward.

Sincerely,

A handwritten signature in black ink, reading "Bruce Rauner". The signature is fluid and cursive, with the first name "Bruce" and last name "Rauner" clearly distinguishable.

Bruce Rauner  
Governor, State of Illinois





GOVERNOR OF MISSOURI  
JEFFERSON CITY  
65102

ERIC R. GREITENS  
GOVERNOR

P.O. Box 720  
(573) 751-3222

October 17, 2017

Dear Mr. Bezos:

My entire team and I are excited to welcome you and to work with you to bring HQ2 to Missouri and the Heartland of America!

From our earliest days, Missouri has been the home of explorers, inventors, and innovators who are turning big, bold ideas into reality. We still are today.

Missouri remains a home for doers – people who deliver results.

I will work personally with you, our General Assembly, and our business and civic leaders across the state to welcome Amazon HQ2 to Missouri.

My team fully and equally support the two proposals submitted by our major metropolitan areas, Kansas City and St. Louis. We are proud of both. While each proposal stands on its own, I also encourage you to envision what Amazon could achieve by partnering with us to unleash the combined strength of the entire state of Missouri.

Now, it's time for you to open the next chapter in Amazon's amazing history. Join us in making Amazon stronger and in transforming the heartland of America, together, right here in Missouri.

Sincerely,

A handwritten signature in black ink, appearing to read "Eric R. Greitens".

Eric R. Greitens  
Governor

# United States Senate

WASHINGTON, DC 20510

October 16, 2017

Mr. Jeff Bezos  
Founder and CEO  
Amazon.com, Inc.  
410 Terry Avenue North  
Seattle, WA 98109

Dear Mr. Bezos:

We write today in strong support of Missouri as the site for Amazon's second corporate headquarters, and encourage Amazon to carefully consider the proposals submitted by the Kansas City and St. Louis metropolitan areas.

Missouri has a rich history of fostering technology companies, from telecommunications providers to health technology solutions firms, data networking companies to high-tech supply chain management services, and a plethora of start-ups supported by the Missouri Technology Corporation, a public-private partnership created to foster the growth of new and emerging high-tech companies. In fact, four of the top twelve metro areas with the fastest growing rate of new start-ups in 2014 were in Missouri, including three of the top five.

Investments in transportation infrastructure have made Missouri attractive to innovative businesses. Streetcars, light rail systems, bus rapid transit, bikeshares, and new forms of ride-sharing are making car-free commuting a great way to get to work in Missouri's metropolitan areas. Missouri's extensive highway system makes destinations throughout the Midwest easily accessible. Our rail lines can provide an even smoother ride and connect Missouri with the rest of the country. Missouri's geographically central location makes flights anywhere in or out of the country easy.

Missourians and visitors alike enjoy the many entertainment and cultural activities available across the state. From our professional sports teams, plentiful art and cultural offerings, and outdoor activities, the state offers something for everyone. In many parts of the state, cyclists, joggers, and walkers can take advantage of the 238-mile Katy Trail, which bisects the state and continues to extend to serve more Missourians. Hiking trails make Missouri's many state parks a great getaway from the office.

World-class educational institutions would provide Amazon not only with potential employees and talent, but potential partnerships that can enhance learning and innovation. Missouri's institutions of higher education are perfect partners for internship programs, career training, and joint research ventures.

We believe the Show-Me State has a lot to offer Amazon and we appreciate your careful consideration of Missouri as the home for your next headquarters.

Sincerely,



Claire McCaskill  
United States Senator



Roy Blunt  
United States Senator



October 19, 2017

Amazon  
Office of Economic Development  
c/o Site Manager Golden  
2121 7th Avenue  
Seattle, WA 98121

Dear Site Manager Golden:

We are pleased to present the St. Louis regional proposal for Amazon HQ2.

Located in the epicenter of the country, the proposed River Campus represents the collaborative efforts of the public and private sectors from two states whose images are visible in the reflection of the iconic Arch that sits at the banks of the Mississippi River.

An educated and vastly skilled workforce, prepared at some of the most prestigious universities in the country, is ready to fuel Amazon's growth. The region's labor force of more than 1.3 million is diverse, and a reasonable cost of living means employers can hire well and employees can enjoy a great quality of life. In fact, the quality of the St. Louis labor pool is a primary reason why nine of Missouri's ten Fortune 500 companies are located in St. Louis.

Our outstanding educational and research institutions and their corporate partners are creating pathways for collaboration to ensure maximum impact for students. Through partnerships with start-ups, innovation centers and accelerators, our academic leaders continuously adapt their curriculum offerings to respond to the changing educational demands of our global marketplace.

Another plus –the majority of those who graduate from the region's many colleges and universities, stay in St. Louis. These young professionals can afford to buy a house and still have money to enjoy the region's many amenities. Add to that, minimal traffic, an agreeable climate, world-class cultural experiences – many of them free – and the ability to connect to any location in the country within two to three hours, result in accessibility, convenience and connectivity that is universally appealing.

Forbes honored St. Louis as the 7th Most Affordable City in 2017, and St. Louis is a past recipient of the All American City Award. St. Louis also received the 2017 top ranking from both *Business Insider* and *The Penny Hoarder* as the place where Millennials can best afford to work, live and play.



We embrace our location — with five airports, including the only international one in the region, St. Louis is a connector to the world. By air, road, river and rail, the region provides innovative, multi-modal options for all forms of travel. The infrastructure for the future is already here — autonomous cars, drone deliveries, pedestrian-centered urban areas, and Hyperloop connectors are more than items to check off on a box — they are realistic endeavors that have the ability to originate in St. Louis. Efforts to bring them to fruition have already begun.

Others see what is occurring here. And they are coming — in 2016, the area had the fastest growing foreign born population in the top 25 metro areas. Since 2010, the St. Louis area has experienced a 53 percent population growth in racial minorities, which is contributing to economic growth and increased diversity. Multiple organizations are in place to welcome these newcomers, and as a result, St. Louis has become a cultural melting pot where creative collaboration between diverse groups and individuals occurs every day.

As St. Louisans, we take ownership of our future. We continue to invest, invent, and insist on the highest standards in all that we do.

We are ready for Amazon HQ2 on Day One.

Sincerely,



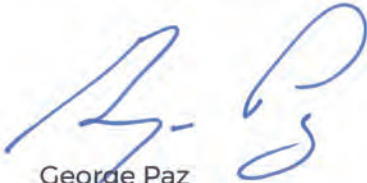
Mark Kern  
Board Chairman  
St. Clair County



Lyda Krewson  
Mayor  
City of St. Louis



Steve Stenger  
County Executive  
St. Louis County



George Paz  
Chairman  
Express Scripts



David Steward  
Founder and Chairman  
World Wide Technology



Mark Wrighton  
Chancellor  
Washington University



# EXECUTIVE SUMMARY









# EXECUTIVE SUMMARY

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St. Louisans are rethinking the way people live, work, educate, and innovate. We are building a region for the future.

Our pitch is simple: Day One /S St. Louis.

More than any other city in North America, St. Louis has the HUSTLE Amazon wants to accelerate its development from Day One. And regional leaders are aligned to support Amazon's vision to control the destiny of HQ2.

St. Louis has the ideal long-term site for HQ2 with endless potential for development on both sides of the Mighty Mississippi: *The River Campus*. Connecting these iconic urban sites is light rail service that runs airport to airport. St. Louis also has the ideal urban site Amazon needs right now with up to 1.1 million square feet available Day One in an existing building: *Amazon Tower*.

No matter your preferred mode of travel, bus, light rail, high-speed train, or futuristic Hyperloop and space travel, St. Louis is building it with an emphasis on bikeable, walkable, and pedestrian-friendly routes. The region's central location makes it easy and fast to get anywhere you want to go.

And we have plenty of flights, too. St. Louis Lambert International Airport (STL) recently made more than \$2 billion in improvements, and has nonstop connections to 72 cities with massive capacity for additional passenger flights and logistic operations. Additionally, the

airport is undergoing an analysis to explore privatization, which provides Amazon with a unique opportunity to inform the long-term development of the region's only international airport in order to better serve the flying public and economic development needs of the region and Amazon.

St. Louis presents an incredible opportunity for Amazon. Our proposal includes a Welcome and Conference Center to host meetings, interview candidates, and message existing and potential customers without ever leaving the airport. This Conference Center would include a hotel and a direct connection to our existing MetroLink light rail system ([www.metrostlouis.org/metrolink/](http://www.metrostlouis.org/metrolink/)) which would allow Amazonians and their guests to travel quickly to our proposed River Campus.

Additionally, our MetroLink connects directly from St. Louis to MidAmerica Airport on the Illinois side of the river. This airport serves both passengers and cargo. And, St. Louis Downtown Airport is just five minutes from the River Campus and is an FBO hub for many Downtown St. Louis businesses plus it's capable of handling large aircrafts such as Boeing 757s or Airbus 300s.

With ample space available to meet your needs, you can move in now and start building Amazon's HQ2 River Campus to your specifications right away. With permitting taking days - not weeks - stellar construction companies, and a regional commitment

to an accelerated time line, your second headquarters is waiting for you on Day One. Next, cost of living. Seattle residents could take a 36 percent pay cut and still enjoy the same standard of living in St. Louis. Food, gas, and housing are all more affordable here. The neighborhood diversity in housing options is one of the best-loved features of living in the region. Numerous housing options exist in a competitive environment to not only meet Amazon employee needs, but at an affordable cost.

Add to that our creative and flexible incentive packages, and the projected billions in cost savings for Amazon to establish and run HQ2 in St. Louis. Move Amazonians to the St. Louis Metro area, hire from the talented tech pool already here, and attract new people to HQ2 while reducing payroll costs from Day One.

Speaking of talent, we've got it. St. Louis is home to world-renowned colleges and universities that attract talented people from across the globe to our region, including Washington University in St. Louis, Southern Illinois University-Edwardsville, Missouri Science & Technology, and St. Louis University. Last year, more than 44,000 students earned certificates and degrees from colleges and universities in the St. Louis Metro area. More than 11,000 of these graduates earned degrees in areas aligned with the needs of Amazon.

Even better for Amazon, our talent pool is full of millennials who love our cost of living, and our obsession with an excellent quality of life. We were recently ranked second for affordability and fourth for millennial happiness by The Penny Hoarder. We're attracting people ages 25-34 with a bachelor's degree at one of the highest rates in the country. Millennials are enjoying all St. Louis has to offer, and they're ready to stay up late, and show up earlier, to work for Amazon, on Day One.

Part of our high quality of life score is due to the culture and lifestyle that St. Louis offers through a popular network of interconnected trails and greenways in Illinois and Missouri, covering everything from urban streets to nature trails. It's also due to our world-class cultural offerings, including the Zoo, the Science Center, the Art Museum, and the country's longest-running and largest outdoor theater, The Muny. They're all within Forest Park, one of the best and the largest urban parks in the country. There's Cahokia Mounds, the pre-Columbian Native American City, the St. Louis Symphony, live

theaters including the Fabulous Fox, Opera Theater, Jazz at the Bistro, and the Black Rep, multiple music and cultural festivals, the Missouri Botanical Garden, and in 2018 the unveiling of the Gateway Arch's four-year, \$380 million renovation.

St. Louis is ideal for families. The abundant cultural attraction and recreation venues offer delightful options for weekends and even staycations. And it's not only livability that is low cost; many of our attractions are free, such as the Zoo, Science Center, Art and History Museums.

Impact is next. The same way Amazon has changed the way the world looks at Seattle, Amazon now has an opportunity to change the way the world looks at St. Louis. Partnering with us to ensure more students in the region enroll in technical degree programs would impact not only the current generation, but generations to come. The vision of a St. Louis Regional Scholarship Program will offer every qualifying high school graduate in the St. Louis metropolitan area access to "gap dollars" to supplement local, state, and federal scholarship and grant sources. Amazon's investment in our education system would be a disruptive force from Day One.

Amazon's passion for innovation is an additional catalytic force for the region to further inspire our already ambitious entrepreneurial community. If you want to make a difference, there's no place more powerful than St. Louis, from Day One.

Finally, there's the Gateway Arch. It's instantly recognizable and an iconic international symbol of big thinking, pioneering spirit and the expansiveness of possibilities around it. It's also an opportunity for Amazon to partner with the community, residents, business leaders, and public officials to build a vision for equity that's bigger than anything anyone has ever accomplished before. That's longterm thinking.

Amazon has built a company based on customer obsession and a commitment to operational excellence. We share those values in St. Louis and want to partner with you to deliver exceptional results.

**St. Louis is ready for  
Amazon on Day One.**



# BUILDING/ SITES

1







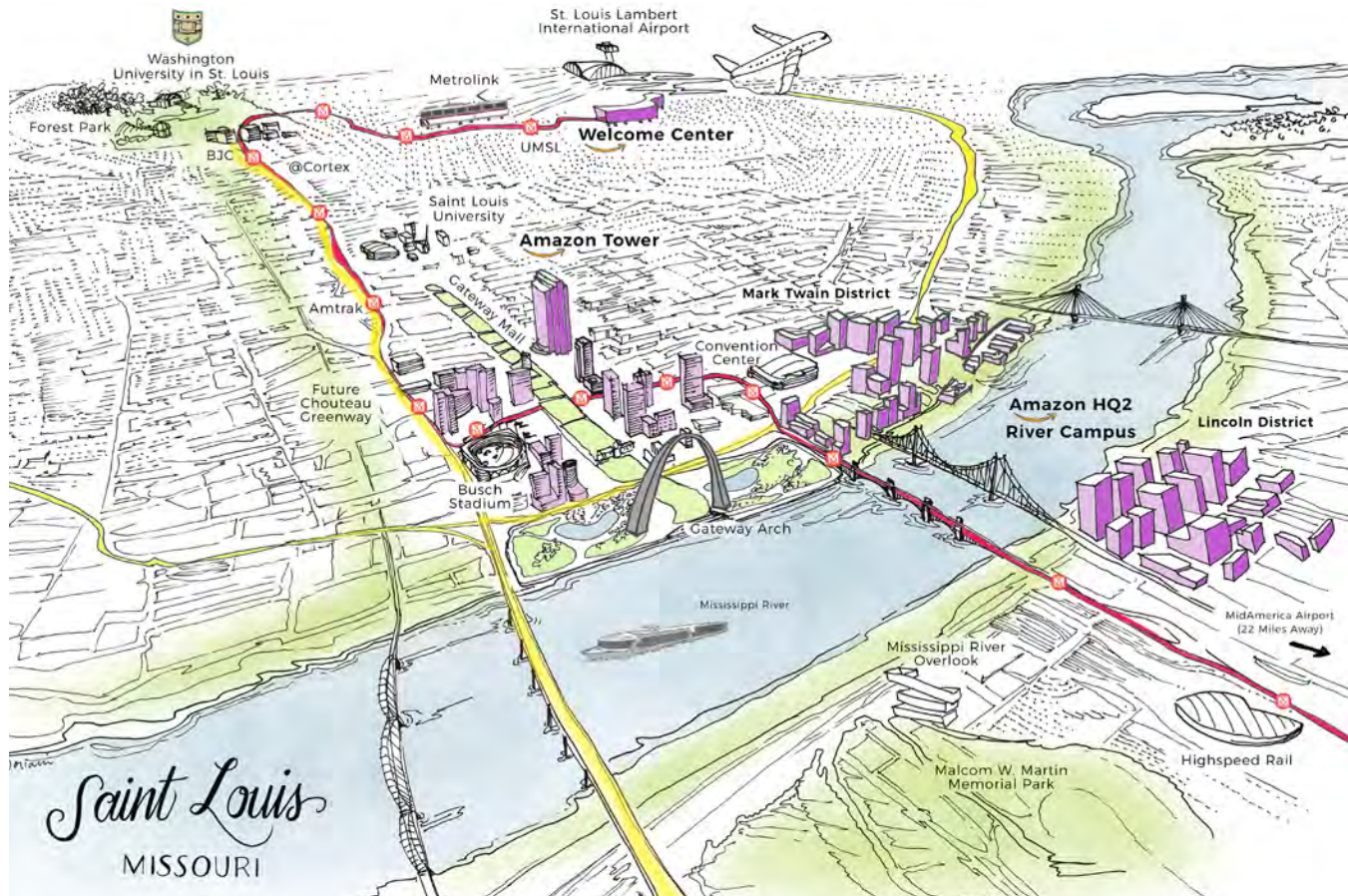
# BUILDING/SITES

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*“Missouri and Illinois are teaming up to present Amazon with a truly unique urban development opportunity in the St. Louis MSA. The St. Louis region is ready to create an efficient intergovernmental organization to serve all of Amazon's needs from Day One.”*

– Bob Clark  
Chairman & CEO, Clayco

# St. Louis is Day One Ready

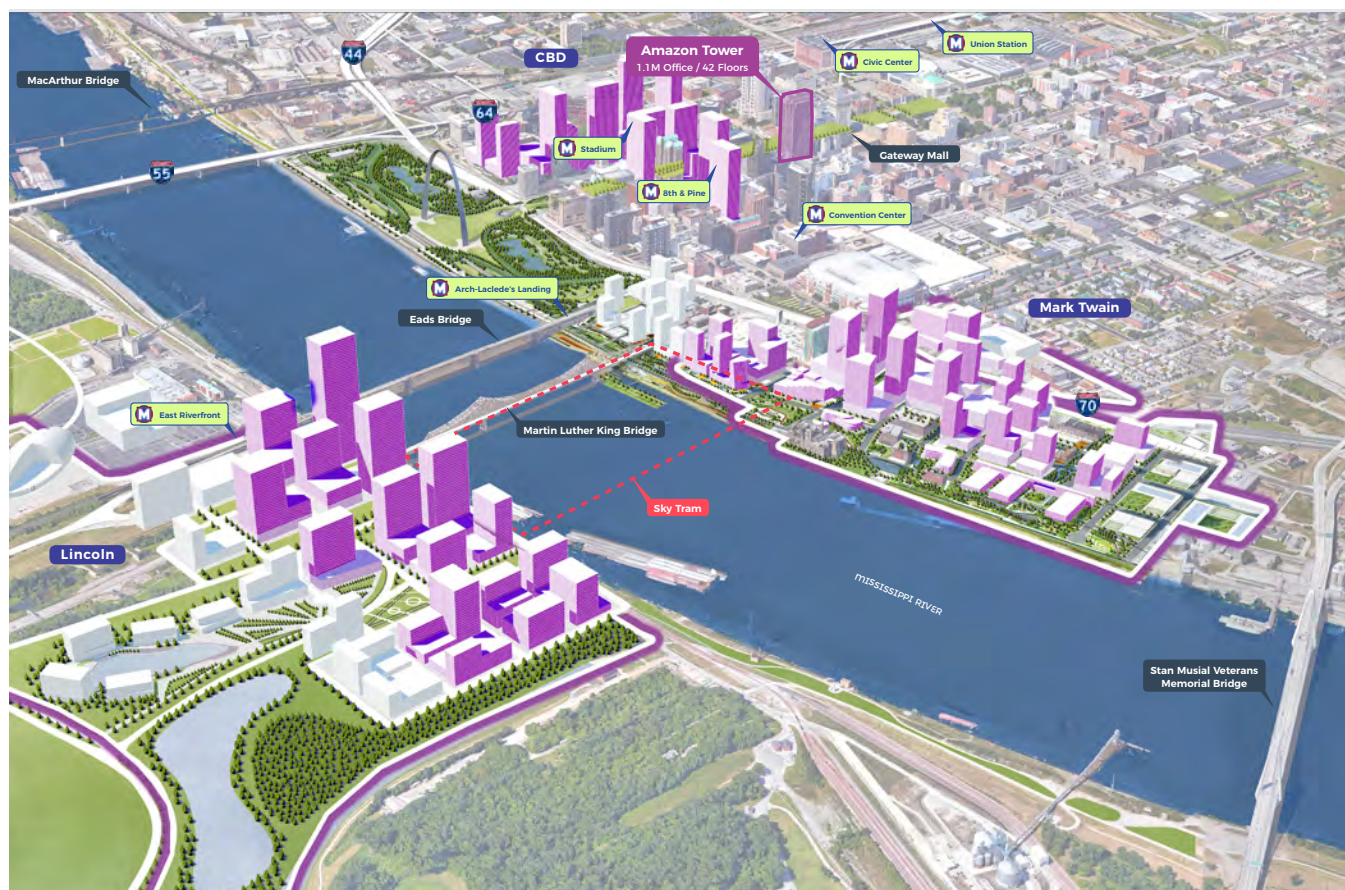


Imagine Amazonians flying into the St. Louis Lambert International Airport, and arriving at the Amazon Conference and Welcome Center, a 215,000-square-foot, world-class conference center. Then imagine them hopping on the light rail system that comes right through the Center and making your way downtown through the University of Missouri, Washington

University, and Saint Louis University stations. Then they arrive at The Amazon Tower, which will serve as swing space during the build-out of the River Campus. The River Campus is over 200 acres of property connected by bridges, MetroLink, the Mississippi River, and a vision for a sky-tram system that can all be delivered by 2019.



## River Campus



The proposed River Campus is comprised of two sites over 100 acres and a Central Business District (CBD) option. The Mark Twain, Lincoln, and CBD are connected by the Mississippi River, two bridges, and light rail. Ongoing expansion of the existing greenways between the sites make this a bikeable and walkable campus of the future.



### Day One: Amazon Tower

The CBD offering is anchored by Amazon Tower, the building located at 909 Chestnut, in St. Louis' downtown urban core. With 1.1 million square feet available by 2019, Amazon Tower has immediate connectivity to: light rail, St. Louis Lambert International Airport, MidAmerica St. Louis Airport, Downtown St. Louis Airport, and the River Campus.

The 909 Chestnut office building is vacant, immediately available for purchase and renovation, and can easily be delivered in 2019 to meet the Phase 1 RFP budget and time schedule requirements.



## The Experience Begins at the Amazon Conference and Welcome Center



View of Amazon Conference and Welcome Center integrated above MetroLink light rail station, and connecting to River Campus.



### Amazon Conference and Welcome Center

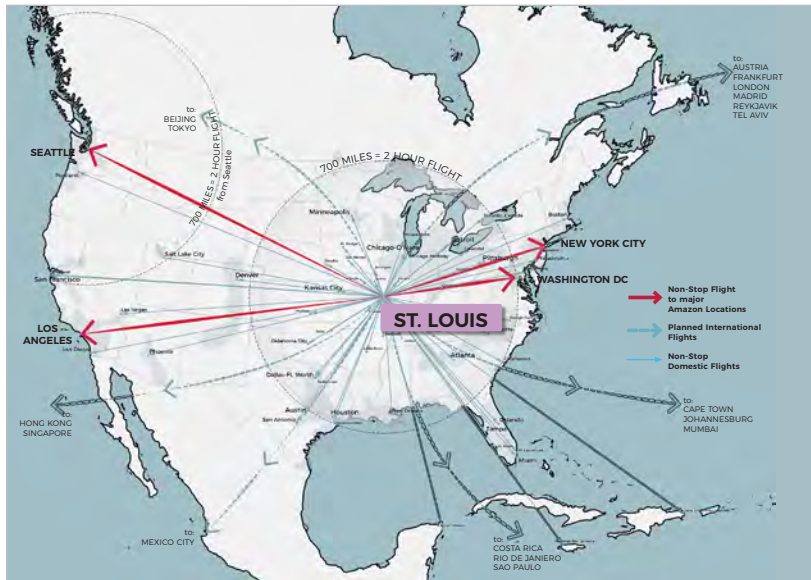
The Day One offering also includes a 215,000-rentable-square-foot Amazon Conference and Welcome Center at Lambert Airport. The Center will serve as an airport hub and transit center for automobile and MetroLink light rail traffic to Amazon Tower and the River Campus. Located at the Southwest Terminal, the Center will include offices, interview, training rooms, and world-class conference center and boardroom facilities.

This pad-ready site at Lambert Airport is controlled by the City of St. Louis and can be made available almost immediately. Because the site is airport property, it would be developed on a long-term land lease with FAA approvals. All due diligence, entitlements, and permits can be obtained to meet the requirements for delivery of the building in 2019<sup>1</sup>.

The Amazon Conference and Welcome Center provide Amazon with the opportunity to greet employees, candidates, guests, and clients at an Amazon-branded hub at Lambert Airport. This state-of-the-art, Amazon-dedicated facility would include a training center, presentation spaces, boardroom and human resources offices, totaling 215,000 rentable square feet along with a 200-key hotel. The Center would provide easy access to the light rail to commute to the proposed River Campus. The Center is also connected to the airport's existing Terminal 2, which can easily be expanded as more gate capacity is required.



<sup>1</sup> A letter of support from the Director of the St. Louis Lambert International Airport is included at the end of this section



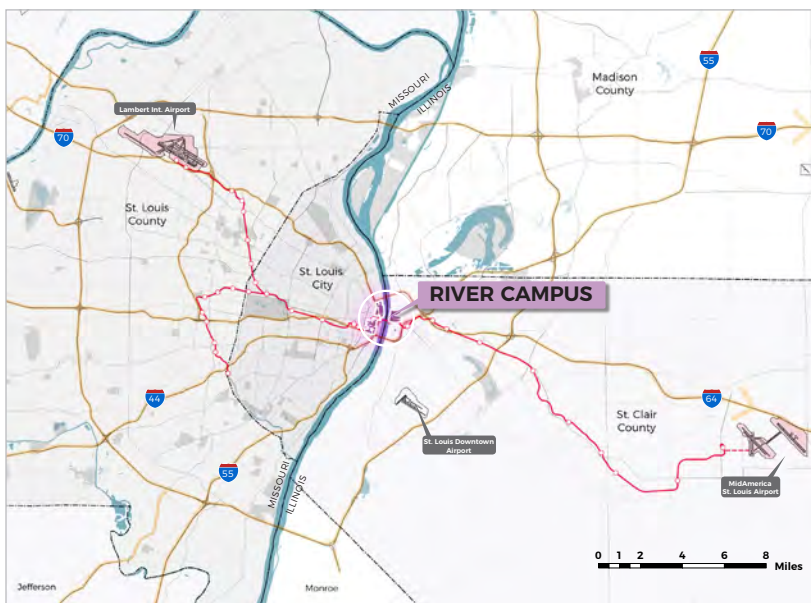
## Perfectly Centered

Located in the Central Standard time zone at the geographic hub of the United States – 500 miles within one-third of the U.S. population, and 1,500 miles within 90 percent of the population – travel time from St. Louis to most major U.S. cities is a mere two to three hours.



## The Crossroads of the U.S.

The St. Louis region is centrally located to recruit top talent from throughout Missouri and Illinois, as well as from nationally ranked colleges and universities in the nearby states of Kansas, Nebraska, Kentucky, Indiana, Arkansas, Iowa, Tennessee, Oklahoma, Wisconsin and beyond. Between 2000 and 2013, the St. Louis region attracted 37,000 people ages 25 – 34 with a bachelor's degree. That is one of the highest rates of millennial attraction in the country reflecting the fact that the St. Louis region is an attractive place to live, work, and play.

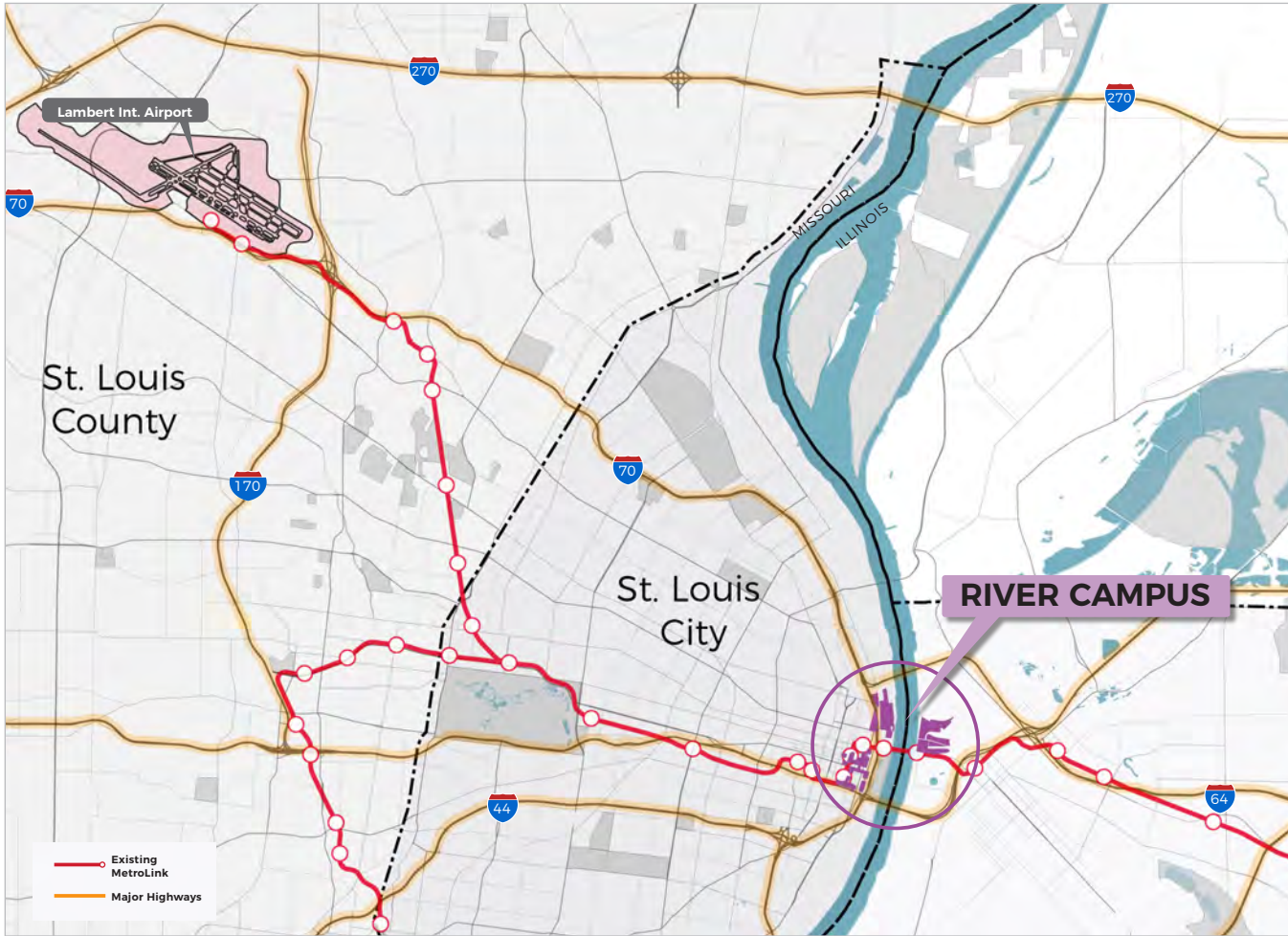


## At the Center of the St. Louis Region

Access to extensive multimodal infrastructure including Amtrak's forthcoming high-speed rail service and Metrolink's 48 miles of light rail, proximity to five interstate systems, five airports, the country's third largest rail hub, and the country's third largest inland port make the River Campus the most centrally located HQ2 site in the United States. The future promises to make the River Campus even more connected to the country as regional leaders explore the viability of a Hyperloop hub in St. Louis.



## River Campus Site Location

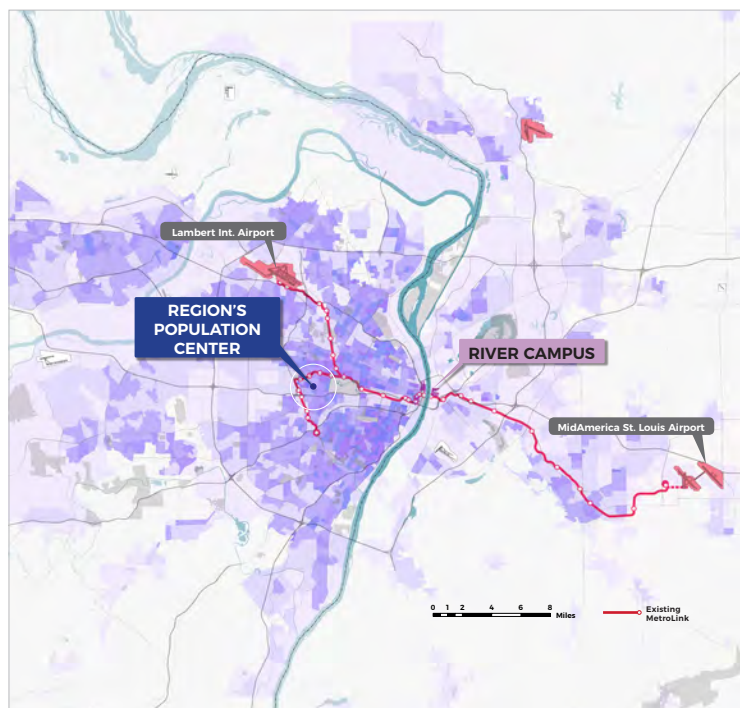


The River Campus Site is centered in our region, located downtown, and connects both sides of the Mississippi River.

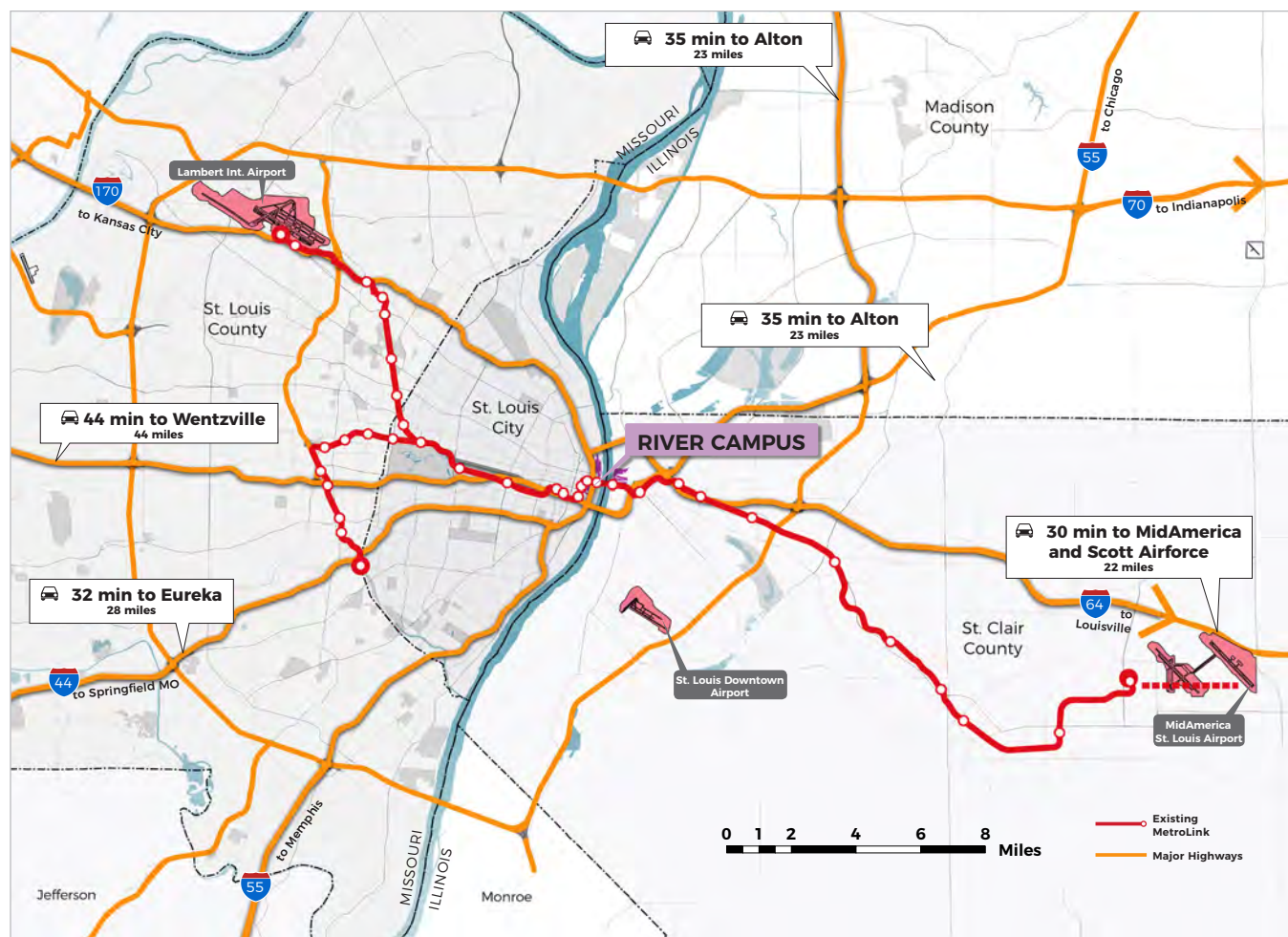
## Proximity to Population Center

St. Louis' footprint in the heart of the Midwest is where more than 2.8 million residents – 750,000 of them millennials – experience a balance of convenience and affordability. The River Campus is in the heart of Downtown St. Louis.

St. Louis has a diverse collection of quality communities, with a rich variety of architecturally distinct neighborhoods and connectedness that is rare in large metro areas. Urban, suburban, small town, and rural lifestyle options are available in the bi-state region, with multiple options for singles and families.



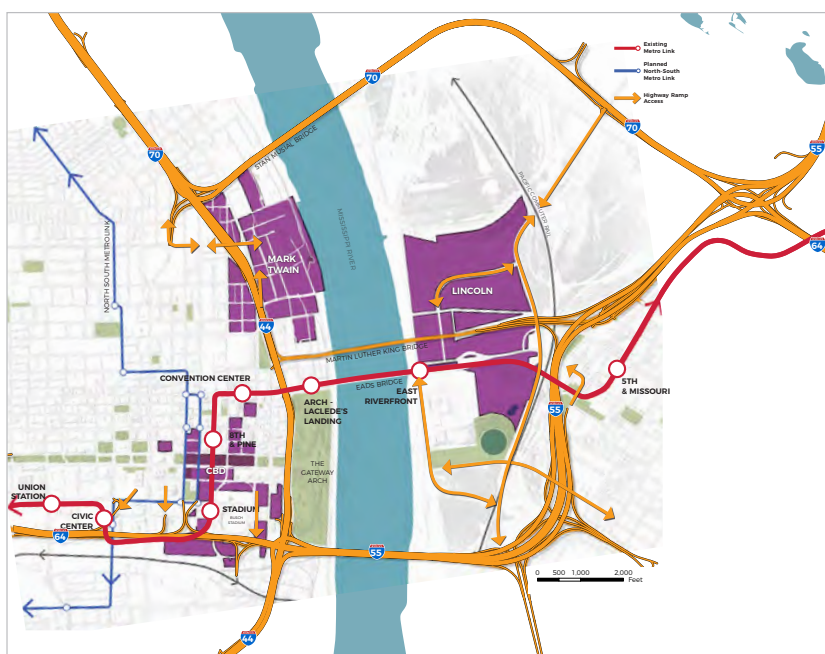
## Proximity to Major Highways, Arterial Roads and Airports



Lambert Airport is a short 18 mile drive on Interstate 70. There are four additional airports in the region including the Downtown St. Louis Airport (5 mile drive to campus) and MidAmerica Airport (26 mile drive to campus).

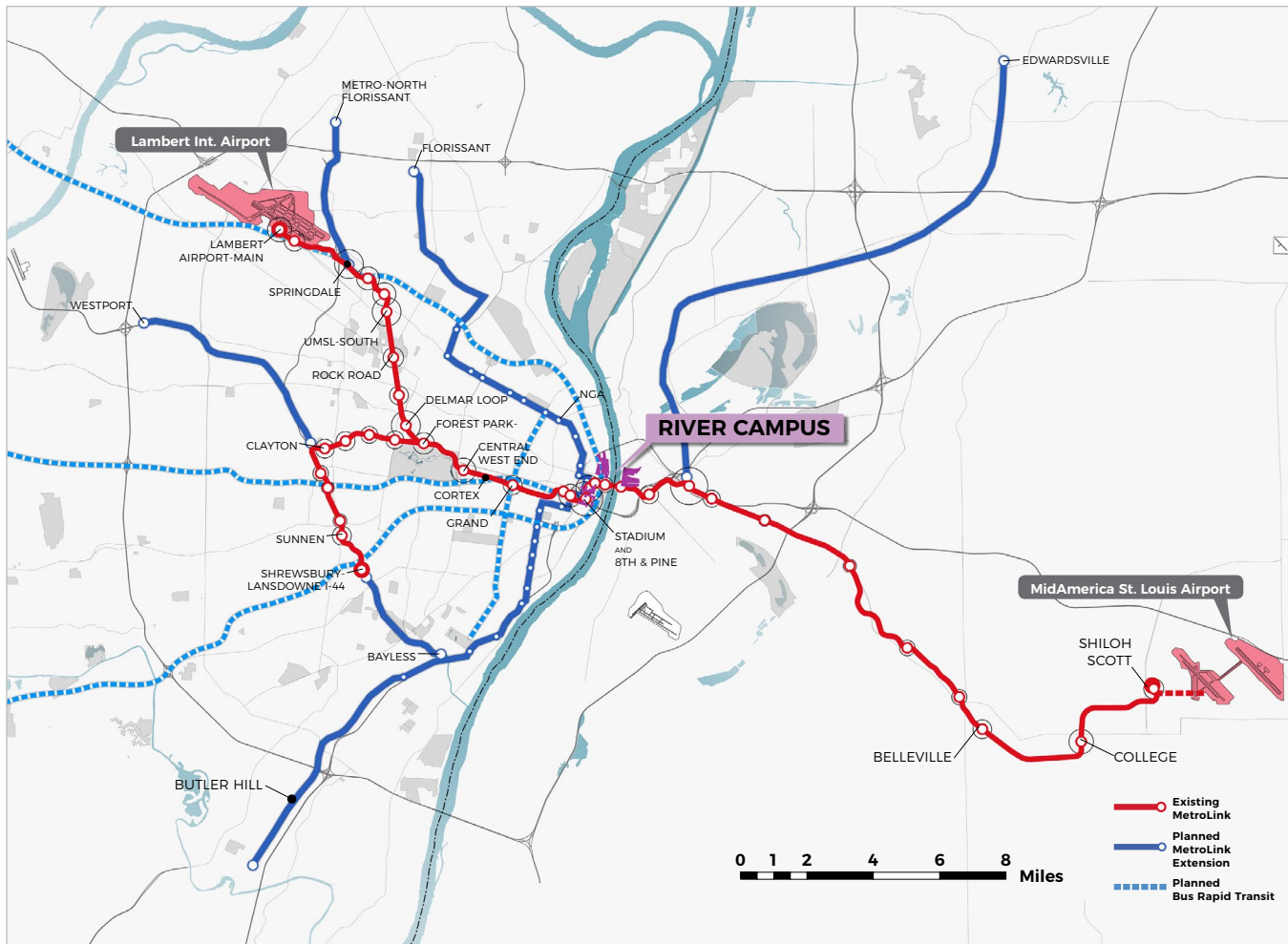
## Proposed Sites Provide Optimal Access to Major Arterial Roads

The central location of the River Campus is easily accessible to and from multiple major arterial highways adjacent to the site.





## Access to Mass Transit – Direct Access To Rail, Train, Subway/Metro, Bus Routes



### Our Regional Transit System

St. Louis is well positioned to provide quality and sustainable transportation options for Amazon's HQ2, now and into the future. Metro operates the St. Louis region's extensive public transportation system, which includes: MetroLink, the region's light rail system; MetroBus, the region's bus system; and Metro Call-A-Ride, a Para transit van system. Metro carried more than 40 million passengers in 2017. It has a fleet of 282 MetroBus vehicles, 50 light rail vehicles and 93 Metro Call-A-Ride vans. Other systems linking up with Metro include Madison County (IL) Transit and St. Charles (MO) Area Transit System.

MetroLink has been called one of the best mass transit systems in the country. The system, buttressed by the region's two largest airports – St. Louis Lambert International Airport and MidAmerica St. Louis Airport – has 46 miles of track and stops at 37 stations between Missouri and Illinois.

The HQ2 CBD Amazon Day One Tower and the River Campus site are connected to existing MetroLink Stations.

### Transit Oriented Development (TOD)

Over 80,000 residential units already exist within a walkable distance of a MetroLink station. Over 4,000 units are currently planned and/or under construction.

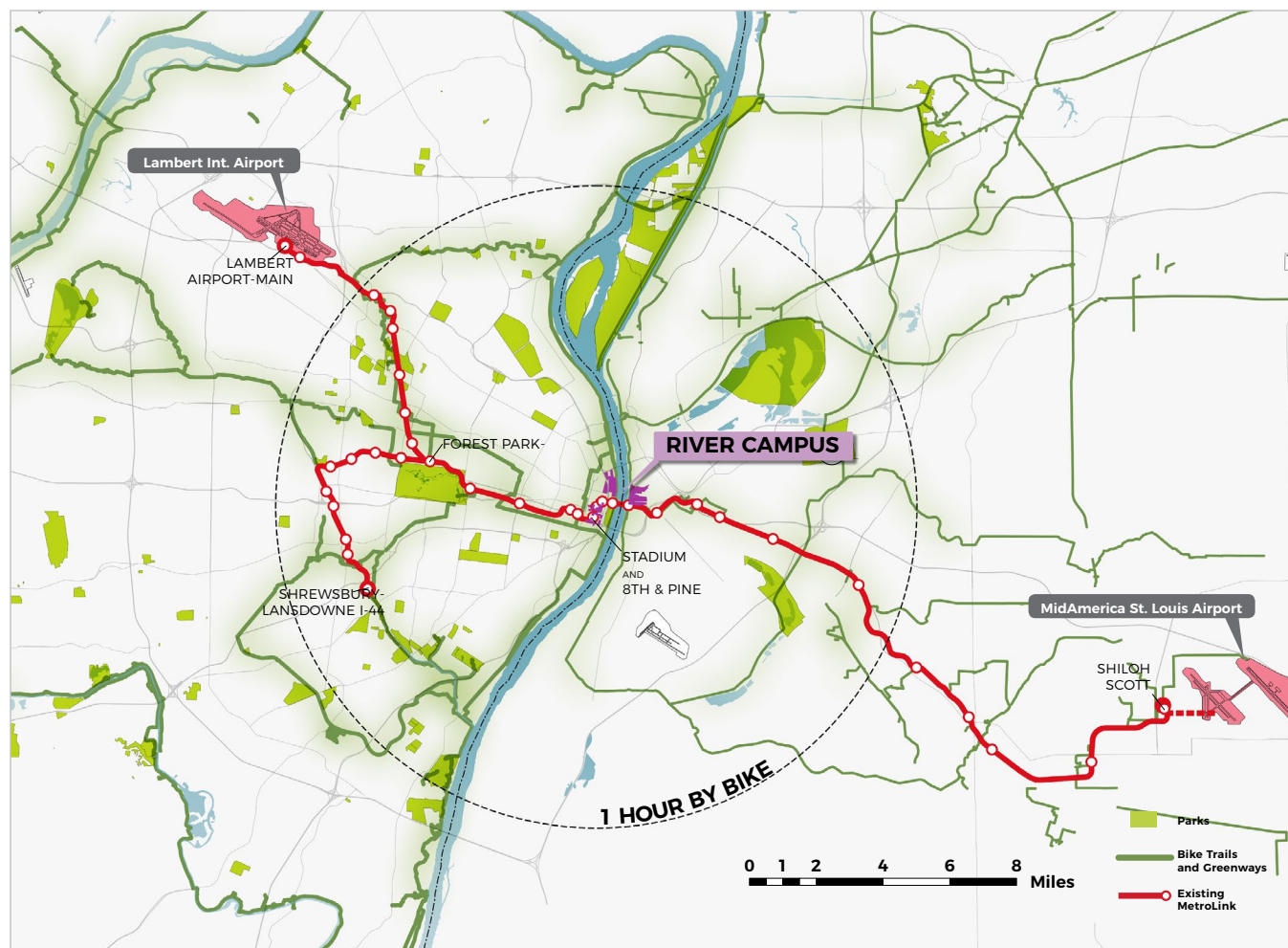
There are available sites for an additional 160,000 future units walkable to MetroLink stations.

There is the combined potential for 240,000 transit oriented residential units walkable to the existing MetroLink stations.

For the full Transit Oriented Development Study, visit: [https://stlouishustle.com/downloads/TOD\\_Study.pdf](https://stlouishustle.com/downloads/TOD_Study.pdf)



## Pedestrian/Commuter Connectivity - Bike & Greenways



**Great Rivers Greenway (GRG)** is a regional (IL & MO) public agency created by a public vote in 2000. That vote created a sales tax that funds the GRG to build, bring to life, and care for the region's network of greenways on both sides of the Mississippi. In 2013, the region dedicated additional funds to parks and greenways, and the GRG became the steward of the local investment in the CityArchRiver Project, the multimillion-dollar transformation of the area surrounding the Gateway Arch.

In 2015, The City of St. Louis and GRG prepared a district-wide master plan for the North Riverfront, as a framework for the redevelopment of this 180-acre site (*full North Riverfront Open Space & Redevelopment Plan* viewed here: [https://stlouishustle.com/downloads/North\\_Riverfront\\_Open\\_Space\\_Redevelopment.pdf](https://stlouishustle.com/downloads/North_Riverfront_Open_Space_Redevelopment.pdf)).

GRG is currently planning to construct the first phase of the Mississippi Greenway Master Plan (*full Master Plan* viewed here: [https://stlouishustle.com/downloads/Mississippi\\_River\\_Greenway.pdf](https://stlouishustle.com/downloads/Mississippi_River_Greenway.pdf)), a 21-acre park and greenway along the North Riverfront, which will connect the Arch grounds to the North Riverfront Trail immediately adjacent to the Mark Twain campus location. Plans include expanded pedestrian, bike, and greenway options extending from Forest Park to the Gateway Arch, and the River Campus site along the CBD campus location.

**Two million people enjoyed the 113 miles of the GRG, and community volunteers gave 10,300 hours to benefit greenways, rivers, creeks, and streams in 2016. St. Louis City, St. Louis County, and St. Charles County, Mo., have collaborated on GRG since its inception in 2000.**

## Pedestrian/Commuter Connectivity – Metro, Bus, Rail, Water

The River Campus provides a walkable and bike-friendly environment with a variety of mobility options.

The site benefits from excellent connectivity at every level due to its central location at the crossroads of our region's arterial highways system.

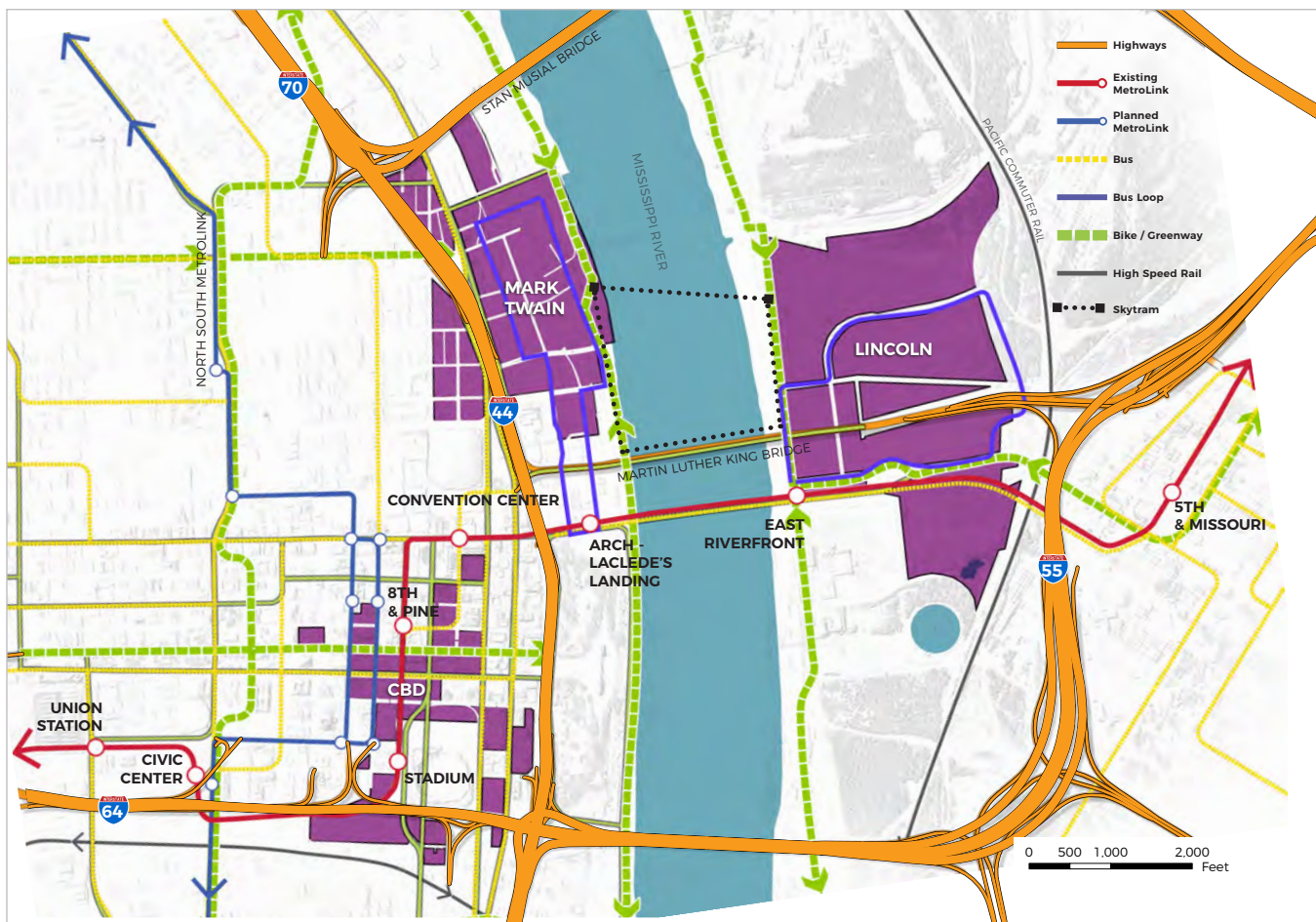
In addition, the River Campus is accessible to multiple MetroLink stations, optimizing convenient access to important regional destinations, including major cultural attractions, neighborhoods, Forest Park, and Lambert Airport.

The River Campus is also connected to our region's many bike trails and greenways, including the North Riverfront and East Levy bikeways. The city and GRG are developing a comprehensive bike and pedestrian system for the entire downtown area including the River Campus.

The River Campus is adjacent to the Jefferson National Expansion Memorial Arch grounds museum, located under the Gateway Arch. The forthcoming Mississippi Greenway Park will connect the River Campus to the Arch grounds and a lush riverfront park. There are similar plans to enhance the Riverfront on the east side.

Within a short walk from the East Riverfront MetroLink station is the proposed high-speed rail station, connecting the St. Louis region to Chicago and Kansas City. There is also an ongoing study to investigate the addition of a Hyperloop connection between Kansas City and St. Louis.

There are multiple vehicular, bike, and pedestrian connections across the river linking the proposed sites. Additional connections envisioned, including a sky-tram, offer new and interesting ways to connect the site.





## River Campus Greenfield Sites & Infill Opportunities – 300+ Acres Shovel-Ready



The River Campus includes both greenfield and infill locations where all of the current property ownership has been identified, and all utility infrastructure for on-site and off-site improvements have been quantified. Sites can be purchased in a land bank, selective demolition, utility relocations and all other work can be completed to make the sites "shovel ready" by mid 2019.

Amazon Tower anchors the Central Business District (CBD) and offers 1.1 million of available square footage Day One. Multiple infill and adjacent sites can provide additional options.

The Mark Twain Parcel in Missouri consists of the former site proposed for the St. Louis Rams NFL stadium. Extensive due diligence, engineering, and design was completed and is immediately available.

The state of Illinois and St. Clair County have provided evidence that the Lincoln Parcel property owners have all been identified and would cooperate with the development of this property as greenfield.

All landowners have been contacted and have confirmed the land is available for purchase and/or lease. To view the landowner letters, please visit: [https://stlouishustle.com/downloads/Ownership\\_Letters.pdf](https://stlouishustle.com/downloads/Ownership_Letters.pdf). This site is ready to build.



Campus Scale Comparison:  
Amazon Seattle to Amazon St. Louis



## Phase 1 (2019)

EXISTING BUILDING OF AT LEAST (500,000-1,000,000 SQUARE FEET) (IN ST. LOUIS \$250,000,000-\$500,000,000)



Amazon Support Amenities

## Phase II Buildings (2019-2023 Build-out)

(1,000,000-2,000,000 SQUARE FEET) (IN ST. LOUIS \$500,000,000-\$1,100,000,000)



Amazon Support Amenities



## Phase III Buildings (2027 Build-out)

(2,000,000-3,000,000 SQUARE FEET) (IN ST. LOUIS \$1,100,000,000-\$1,700,000,000)



Amazon Support Amenities

## Phase IV (Full Build-out)

PHASE IV AND BEYOND WILL GROW ORGANICALLY. AT FULL BUILD-OUT, THE CAMPUS OR PARK MAY EXCEED 8 MILLION SQUARE FEET AND OVER \$5 BILLION IN TOTAL CAPITAL INVESTMENT BEYOND 2027.



Amazon Support Amenities



## Future Vision - The Blueprint for the future of Amazon in St. Louis

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The proposed River Campus offers Amazon a unique opportunity to create a model urban community of the future. St. Louis has assembled an unprecedented amount of property adjacent to downtown core amenities, the world-renowned Gateway Arch, connectivity to multiple light rail stations, and two high-profile riverfront sites on one of the most important waterways on the planet.

The Blueprint for HQ2 in St. Louis leverages this one-of-a-kind offering by scripting a comprehensive, step-by-step development strategy with built-in flexibility that results in a futuristic new riverfront and Central Business District, anchored by Amazon.



### Sustainable Infrastructure

Infrastructure will underpin the quality of life and the efficiency of development within the River Campus plan for current and future generations. The efficient and secure supply of energy and water, the recycling of low-cost wastewaters and solid wastes, and the provision of adequate and safe transportation solutions define the scope of infrastructure for this proposal.

The sustainable design of the River Campus provides opportunities to reduce both the capital costs of infrastructure and the future costs of operation and maintenance.

### On-Site Generation of Energy

Supplying energy for the future needs of the River Campus includes the potential for on-site generation of energy through the use of renewable resources.

#### POSSIBLE ON-SITE RESOURCES



Hydrokinetic Turbine Farms along the Mississippi River



Harvesting Biomass from the Mississippi River



Rooftop Wind Turbines



Rooftop Solar Panels



Local Steam Plant - Combined Heat and Power System



Natural Gas Facilities

### EcoDistrict

We envision HQ2 as part of a new "EcoDistrict." The scale of this redevelopment offers opportunities to optimize energy, water, and waste systems in many more sustainable ways. This also offers the potential to leverage the adjacency of the River Campus to the Mississippi River, and its powerful current, as a resource for innovative power generation.

#### EcoDistricts prioritize<sup>1</sup>:

##### **Place**

Inclusive and vibrant communities, affordable housing, and accessible public spaces.

##### **Prosperity**

Equitable access to quality education and career pathways, inclusive of business startups.

##### **Health + Wellbeing**

Active living based on walkability, equitable access to affordable health care, local fresh food, and strong public safety.

##### **Connectivity**

Effective and equitable multimodal connectivity and a high-quality digital network.

##### **Living Infrastructure**

Healthy soils, water, trees, and wildlife habitat, integrated into the built environment.

##### **Resource Restoration**

Efficient water use, remediated land, and clean, renewable energy production that reduces greenhouse gas emissions.

<sup>1</sup> EcoDistrict Protocol

## River Campus - Mark Twain - Missouri



The Mark Twain site is adjacent to the Mississippi Greenway Park. This urban green space includes innovative new mixed-use buildings that leverage existing assets, including Laclede's Landing, Lumière Place, the Four Seasons Hotel, and a cluster of historic gems. The vision respects the site's industrial past and promotes a sustainable future.





## River Campus - Mark Twain - Missouri

Mississippi Greenway Park



Entrance to Mark Twain Site





## River Campus - Lincoln - Illinois



The Lincoln site takes advantage of a high-profile, greenfield site ready for development. This location features a planned High Speed Rail Station linking the region to Chicago and beyond, a MetroLink station, and a vision for a sky-tram. A riverfront greenway along the Mississippi is part of the region's trail network. The contiguous site is a blank canvas for development.



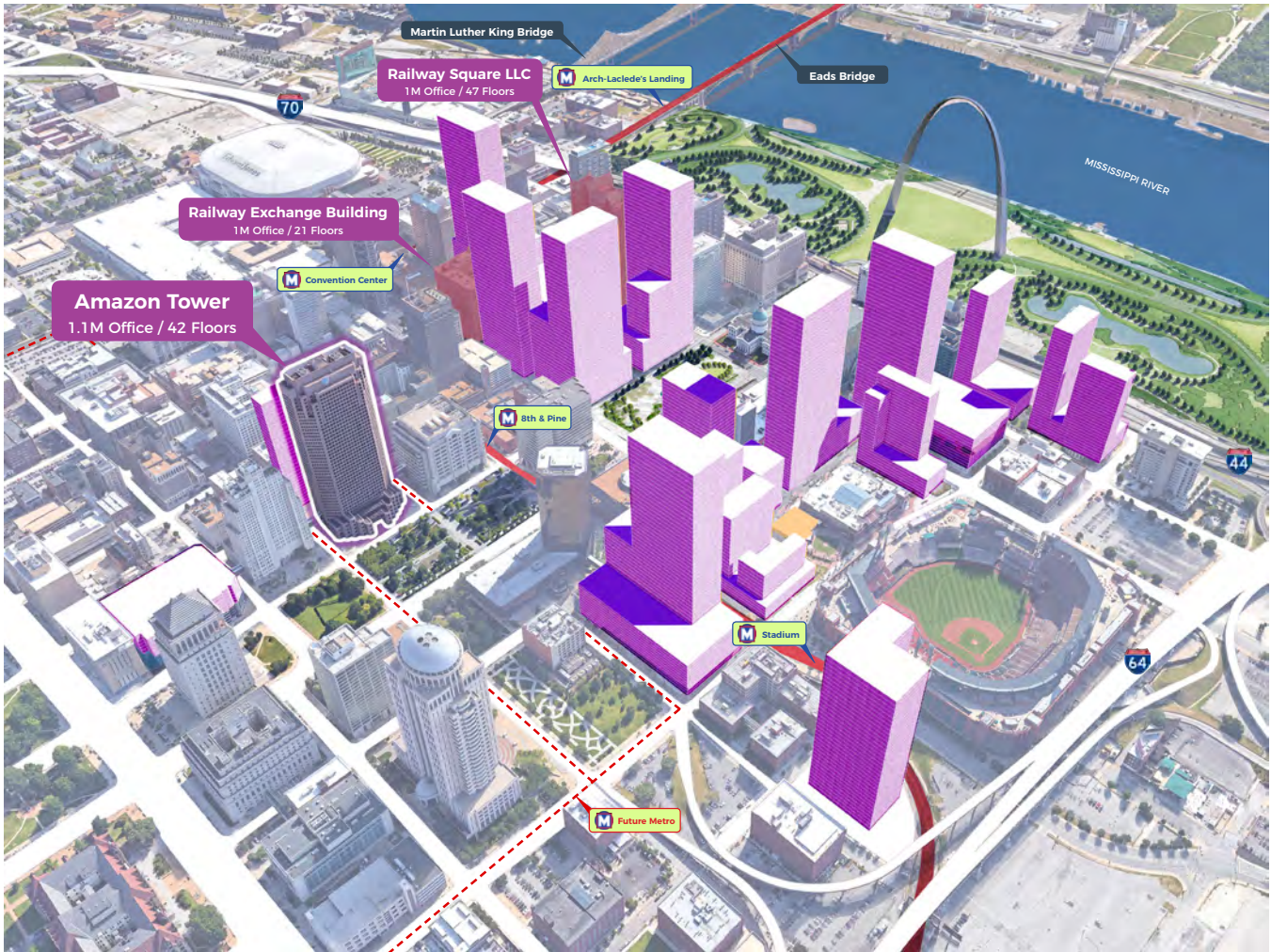


## River Campus - Lincoln - Illinois





## Central Business District (CBD)



The Central Business District (CBD) is anchored by Amazon Tower, and located in the urban core of Downtown St. Louis. This site is adjacent to a sculpture park, hotels, a convention center, retail, and cultural amenities. Amazon Tower overlooks the award-winning Citygarden and the Gateway Mall, a landscape stretching from the Arch, then West to Union Station and beyond. Served by multiple MetroLink stops, incredible sites (that frame views of the Mall and Arch) are available for both new infill development and historic rehabilitation.



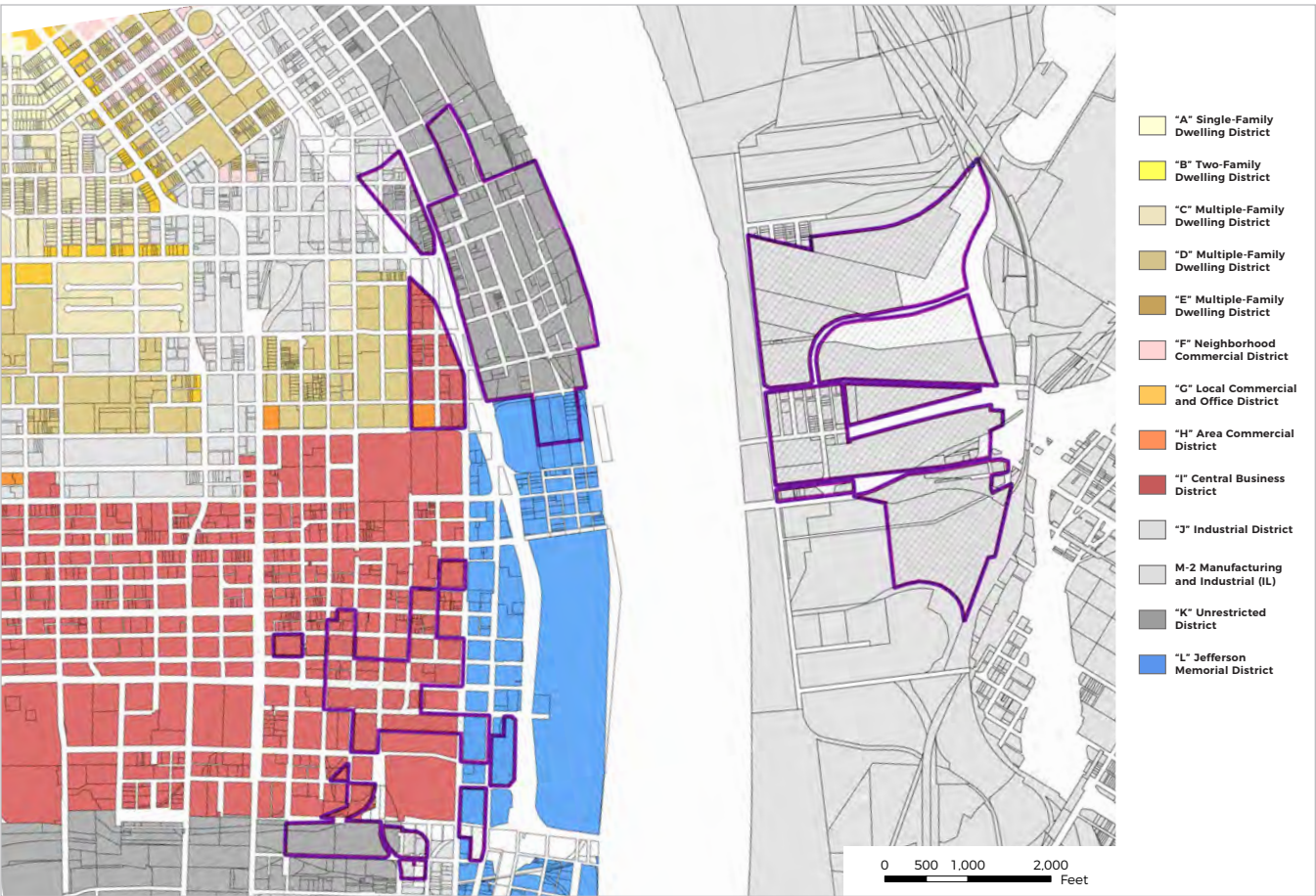


## Central Business District (CBD)



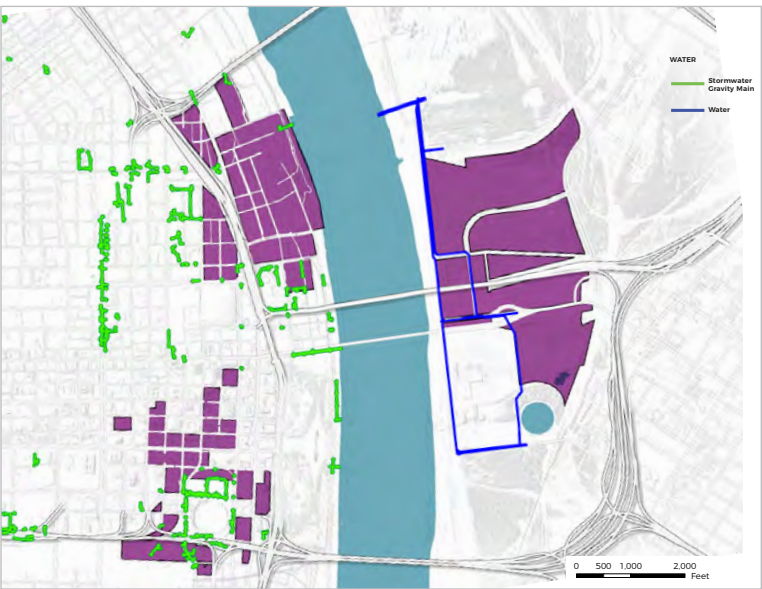


# River Campus Current Zoning



The majority of the site parcels are either already zoned for the needs of Amazon River Campus or are easily and readily adaptable.

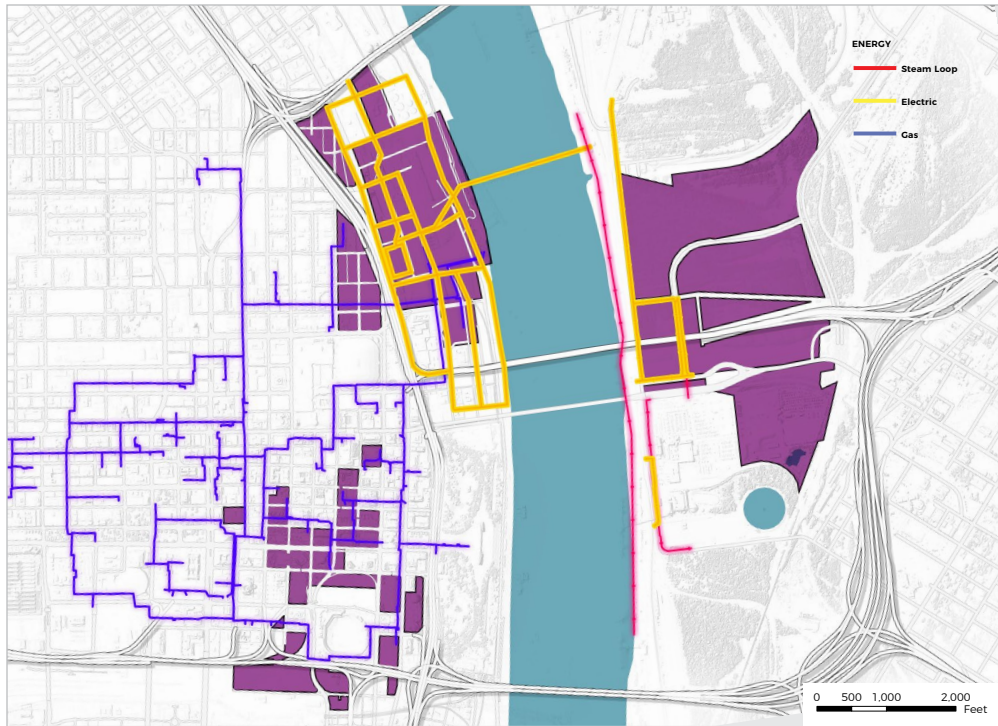
# River Campus Utility Infrastructure - Water



The St. Louis region has access to abundant sources of clean, fresh, inexpensive water. The St. Louis City municipal system supplies the proposed Mark Twain and Amazon Tower sites for HQ2. Missouri-American Water supplies any facilities Amazon may construct in or around St. Louis Lambert International Airport. Both systems are members of the Partnership for Safe Water, an alliance of six drinking-water organizations affiliated with the American Water Works Association. As a result, customer satisfaction ratings for water quality in St. Louis are among the highest in the U.S.



## River Campus Utility Infrastructure - Electric/Gas/Steam Loop Energy System



### Gas

Spire is the natural gas provider for much of the proposed River Campus. Spire would assign a key account manager to Amazon to manage site planning relative to technology, rates, and efficiency standards. The account manager will identify energy opportunities for Amazon, including qualifying rebates for energy efficiency measures, and ensure the Spire system is adequate to service Amazon's HQ2.

### Electric

AmerenUE provides electricity in the St. Louis region and its Missouri subsidiary, Ameren Missouri, offers electric utility rates 19% below national average. Ameren Missouri has an Economic Development and Retention Rider, enabling Ameren to meet or beat any competing energy rate Amazon may consider down to its incremental cost to serve, which varies within the mid thirty dollars per megawatt hour range.

Ameren Missouri recently announced its intent to substantially expand its renewable energy portfolio – particularly from wind and solar sources, which will drive a predictable, low-cost utility rate for years to come as these technologies continue to improve cost efficiency.

In Illinois, electric customers may choose their energy supplier. For point of reference, Ameren Illinois has recently filed for a second consecutive rate decrease with Illinois regulators, and its average industrial rate is \$0.453/kwh, falling well below the national \$0.68/kwh average.

Note that much of the River Campus encompasses areas already served by Spire, with capacity sufficient for Amazon's needs. Spire offers to cost-share the installation of any natural gas infrastructure Amazon may build out. In addition, Spire, a regulated utility, can offer Amazon a special price on its service, with discounts of up to 30% off volumetric gas rates over five years.

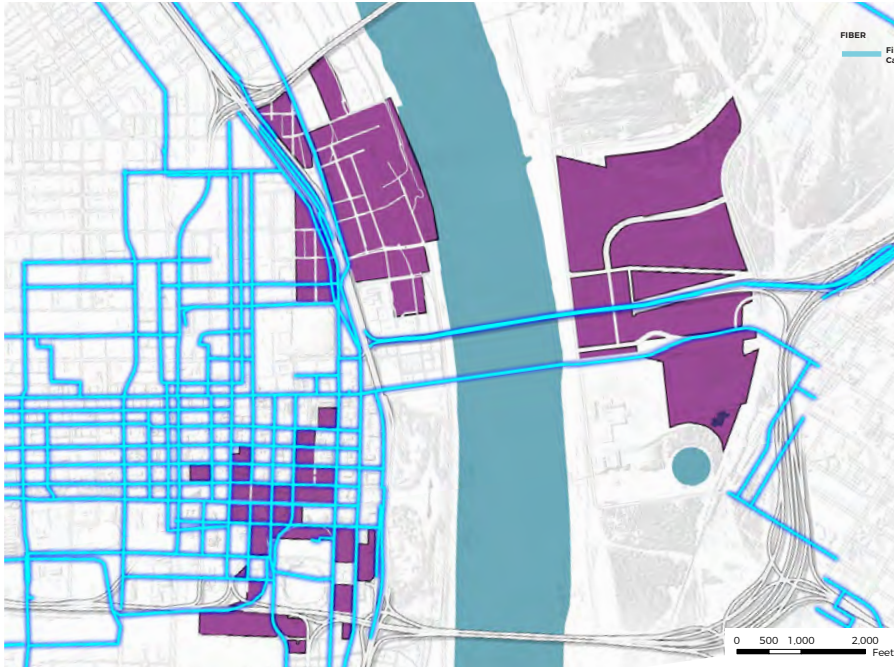
### Steam Loop Energy System

The proposed River Campus is connected to the highly efficient steam loop system. In addition, chilled water service can be provided for air conditioning and other needs should demand arise by Amazon.

The power plant that provides steam into the River Campus is a natural gas-fired cogeneration plant from which steam and electricity are simultaneously generated. The electricity generated by the power plant is sold into the power grids at wholesale, and the resulting steam is distributed to buildings via the steam loop.

The combined steam heat and electric power plant can achieve energy efficiencies above 80%, which is far more efficient than a conventional power-only plant, where two-thirds of the energy content of its fuel is exhausted as heat into oceans, rivers, or the atmosphere.

## River Campus Connectivity – Optimal Fiber Connectivity



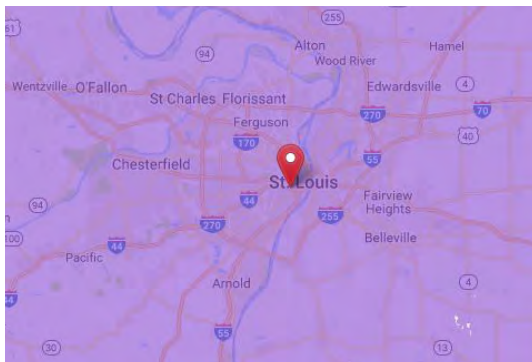
### Regional Network Viability

Greater St. Louis has a long-haul and metropolitan fiber infrastructure collectively established by more than 15 service providers. St. Louis' base fiber optic infrastructure can support any standard business applications, including high bandwidth networks. The St. Louis region possesses a number of key components that can be leveraged to build strong Internet or data connectivity. These include regional internet access points, diverse long-haul routes, and competitive service providers. Additionally, dark fiber is available.

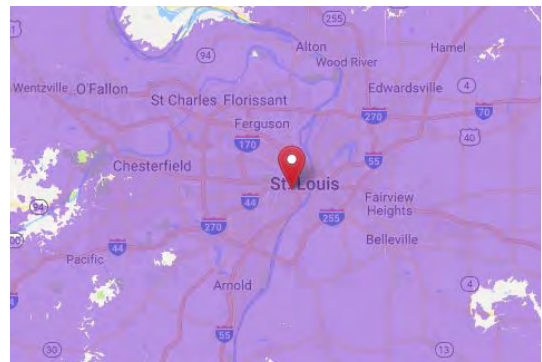
## River Campus Connectivity – Cell Phone Coverage

The entire river campus is covered by multiple cellular services to ensure optimal service.

### AT&T



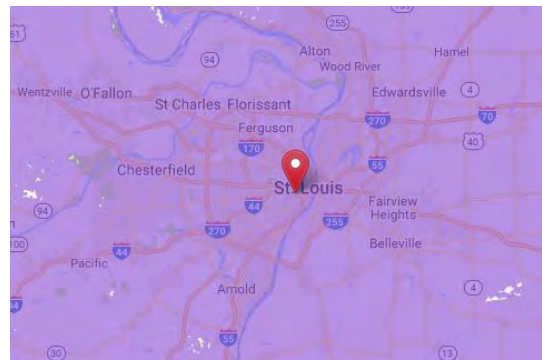
### SPRINT



### T MOBILE



### VERIZON





## River Campus Estimate of Assembly and Development costs

### Mark Twain

The Mark Twain site was recently assembled for the proposed St Louis Rams replacement stadium. Significant research, title study, utilities and all other due diligence was completed to purchase and make the site pad ready for the stadium that was to be delivered by 2021.

It's believed that the property could be assembled quickly and that approximately 100 acres could be purchased for less than \$60 million. About \$14 PSF. All demolition, environmental clean-up, utility relocation including the major Ameren sub-station and high line transmission wires and other costs to make the site 100% pad ready would be less than \$55 million. With engineering and permitting fees the total would be \$120 million or \$28.00 PSF.

### Lincoln

The state of Illinois and St. Clair County has been in extensive talks over the last several years to assemble what would be the Lincoln site.

It is believed the property could be assembled quickly and that approximately 100 acres could be purchased for less than \$8.7 million. About \$1.50 PSF. Illinois authorities recognize and accept the requirement for Amazon to develop this land, they will be mandated to perform all environmental studies and remediation at the sole cost of local Illinois authorities. The levee is part of a 500 year protection project which is completed to the 100 year mark, and the remaining engineering and construction to achieve the 500 year level will be financed by an already approved quarter-cent tax. The Army Corps of Engineers is expected to approve the final plans in 2018. Federal government will subsidize 65 percent of the project and

local authorities will pay 35 percent. The local government has \$69 million in the bank thus far.

All in triple net lease rates for new construction using a 25-year credit tenant lease for a theoretical 800 RSF Class A Office Tower in the proposed River Campus, with 2.2 parking per 1000, would be \$26.00 PSF with annual 2% increases.

### Amazon Tower

The proposed Amazon Tower located at 909 Chestnut is a 1.4 million GSF building that is approximately 30 years old. The building is vacated and ready for development. It can be purchased for \$20 million. The development of the building would require adding parking and overall demolition to shell and core and new interior fit out along with other rehab to make the building Amazon ready and could be completed by mid 2019.

All in triple net lease rates using a 25-year credit tenant lease for Amazon Tower at 909 Chestnut 1,100,000 RSF Class A office tower with 1.2 parking per 1000 (the city is providing additional parking in the incentives) would be \$21.00 PSF with annual 2% increases.

### Amazon Conference and Welcome Center

The Amazon Conference and Welcome Center is being proposed on a site located at the east terminal of St. Louis Lambert Airport. The site would be made available as a very low cost long term land lease.

All in triple net lease rates using a 25-year credit tenant lease for a theoretical NEW 215,000 RSF Amazon Conference and Welcome Center with minimal parking would be \$34.00 PSF with annual 2% increases.



### River Campus Current Parcel & Ownership

All land owners have been contacted and have confirmed that their property is available for purchase and/or lease. To view the landowner letters, please visit: [https://stlouishustle.com/downloads/Ownership\\_Letters.pdf](https://stlouishustle.com/downloads/Ownership_Letters.pdf). These proposed sites for River Campus are ready for development Day One. Ownership of the property is detailed following.

River Campus - Mark Twain Ownership





## MARK TWAIN PARCEL OWNERS

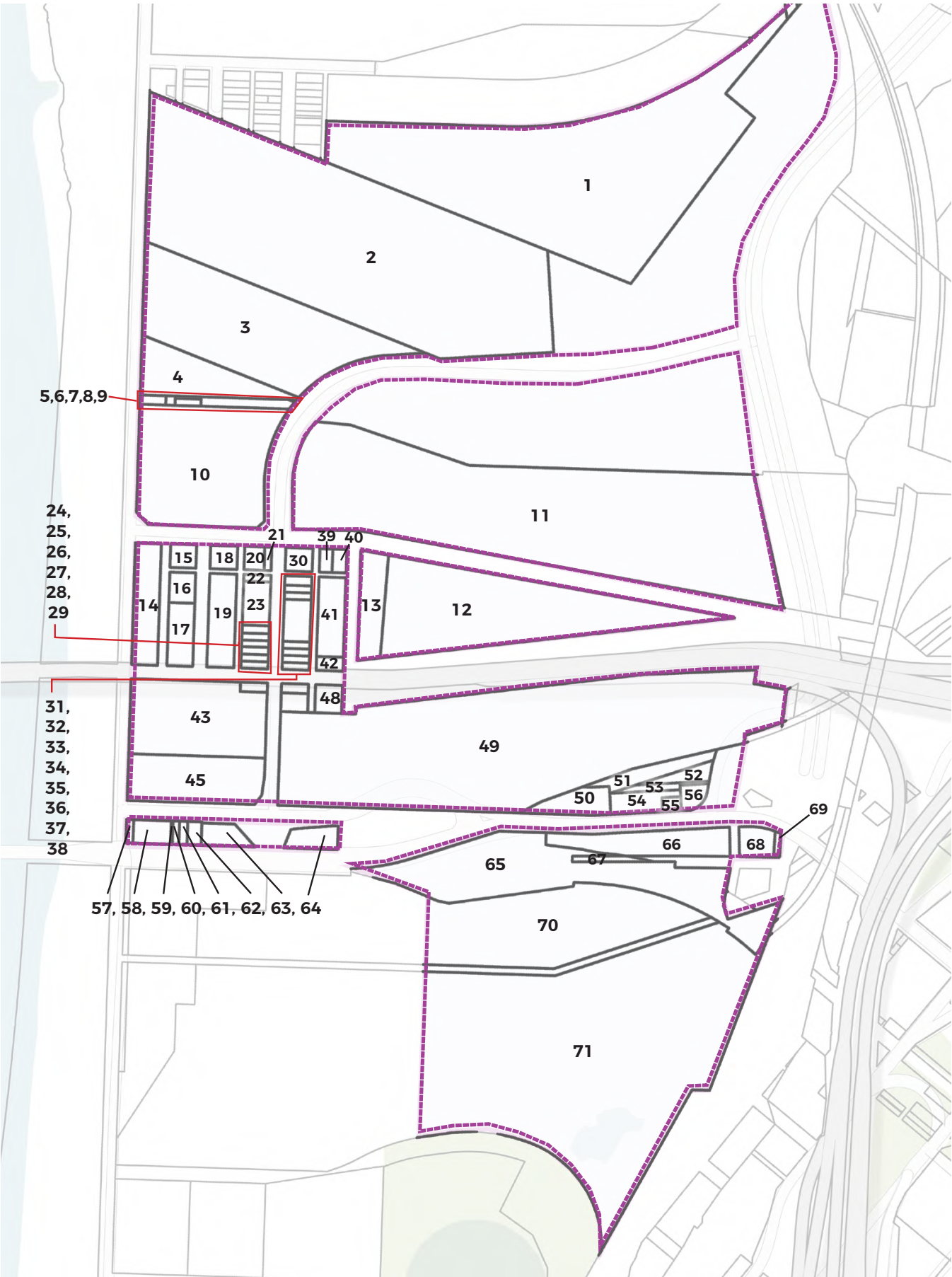
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TEI (ES) LLC	<b>4</b>
TEI (ES) LLC	<b>5</b>
TEI (ES) LLC	<b>6</b>
TEI (ES) LLC	<b>7</b>
CITY OF ST. LOUIS (LCRA)	<b>8</b>
CITY OF ST. LOUIS	<b>9</b>
AL'S RESTAURANT INC	<b>10</b>
ALLIANCE REALTY SERVICES LLC	<b>11</b>
CITY OF ST. LOUIS (LRA)	<b>12</b>
ASHLEY ENERGY LLC	<b>13</b>
NEAL, MARY PAMELA	<b>14</b>
TEI (ES) LLC	<b>15</b>
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MASK, ROSEMARY A TRS	<b>21</b>
MASK, ROSEMARY TRS	<b>22</b>
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T L J COMPANY LLC	<b>24</b>
SAI HOSPITALITY LLC	<b>25</b>
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TRAILER PARTS INC	<b>27</b>
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NORTHSIDE REGENERATION LLC	<b>35</b>
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1255 LEWIS LLC	<b>37</b>
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WILLIAM A KERR FOUNDATION LLC	<b>42</b>
NORTH RIVERSIDE HOLDINGS LLC	<b>43</b>
PRIORITY PROPERTY HOLDING LLC	<b>44</b>
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BARTLETT, GEORGIA M	<b>52</b>
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KINGSTON I LLC	<b>62</b>
NATURES METHANE FARM WORKS LLC	<b>63</b>
UNION ELECTRIC	<b>64</b>
MED VAC INC	<b>65</b>
1520 NORTH BROADWAY LLC	<b>66</b>

EUBANKS STORAGE LLC	<b>67</b>
O'FALLON STREET LLC	<b>68</b>
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O'FALLON STREET LLC	<b>76</b>
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CAMMARTATA, FRANK J & CAROL R	<b>109</b>
STATE OF MISSOURI	<b>110</b>
BDS & COMPANY INC	<b>111</b>
BDS & COMPANY INC	<b>112</b>
BDS & CO INC	<b>113</b>
FLORENCE ENTERPRISES LLC	<b>114</b>
BDS & COMPANY INC	<b>115</b>
BDS & COMPANY INC	<b>116</b>
BDS & COMPANY INC	<b>117</b>
BDS & COMPANY INC	<b>118</b>
GLOBAL INVESTMENT GROUP LLC	<b>119</b>
CARDINAL BLDG MGMT LLC	<b>120</b>
SYDNOR, JOHN J & JEAN M (TRS)	<b>121</b>
BOOJAROO HOLDINGS LLC	<b>122</b>
BOOJAROO HOLDINGS LLC	<b>123</b>
SPRINKLER FITTERS # 268 REDEVEL CORP	<b>124</b>
STATE OF MISSOURI	<b>125</b>
BDS & CO INC	<b>126</b>
HI-PERFORMANCE COATINGS CONSULTANTS	<b>127</b>
WASHINGTON, DAVID B	<b>128</b>
STATE OF MISSOURI	<b>129</b>
EMRIE GROUP LLC	<b>130</b>
EMRIE GROUP LLC	<b>131</b>
HI-PERFORMANCE COATINGS CONSULTANTS	<b>132</b>
OGIER, MARK C	<b>133</b>

GEO LOUIS MAKLA INC	<b>134</b>
LOUGHMORE LLC	<b>135</b>
BIAN, JIANG & RUI B CEN	<b>136</b>
STATE OF MISSOURI	<b>137</b>
OUTDOOR SYSTEMS INC	<b>138</b>
STATE OF MISSOURI	<b>139</b>
STATE OF MISSOURI	<b>140</b>
JOHN BENSON ELECTRIC CO	<b>141</b>
STATE OF MISSOURI	<b>142</b>
CITY OF ST. LOUIS (LRA)	<b>143</b>
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STATE OF MISSOURI	<b>146</b>
HAAG, WILLIAM J III TR	<b>147</b>
SCAUZZO, LELA & MICHAEL J	<b>148</b>
ASHLEY ENERGY LLC	<b>149</b>
VENI VIDI VICI LLC	<b>150</b>
VENI VIDI VICI LLC	<b>151</b>
REESE, ROBERT T & LEVINA M	<b>152</b>
PMJ HOLDINGS LC	<b>153</b>
JUSTINE PETERSEN HOUSING	<b>154</b>
REESE, ROBERT T & LEVINA M	<b>155</b>
HIBDON, WILLIAM T & NANCY E FOX	<b>156</b>
HIBDON, WILLIAM T & NANCY E FOX	<b>157</b>
1416-18 N BROADWAY LLC	<b>158</b>
1416-18 N BROADWAY LLC	<b>159</b>
AQUISITIONS UNLIMITED LLC	<b>160</b>
1428-30 N BROADWAY LLC	<b>161</b>
1428-30 N BROADWAY ST LLC	<b>162</b>
1432 NORTH BROADWAY LLC	<b>163</b>
SHADY JACKS CAFE ON BROADWAY LLC	<b>164</b>
MR CHARLES LLC	<b>165</b>
MR CHARLES LLC	<b>166</b>
SETTLEMOIR, WILLIAM M & ANNE	<b>167</b>
230 CASS AVENUE LLC	<b>168</b>
MERCHANTS BRIDGE TERMINAL R.R. CO	<b>169</b>
MERCHANTS BRIDGE TERMINAL R.R. CO	<b>170</b>
MERCHANTS BRIDGE TERMINAL R.R. CO	<b>171</b>
ST LOUIS MERCHANTS BRIDGE TERM RW CO	<b>172</b>
CITY OF ST. LOUIS	<b>173</b>
TERMINAL R R ASSOCIATION OF ST LOUIS	<b>174</b>
CITY OF ST. LOUIS	<b>175</b>
CITY OF ST. LOUIS	<b>176</b>
CITY OF ST. LOUIS	<b>177</b>
METROPOLITAN PARK & RECREATION DST	<b>178</b>
REINSCH, NORBERT L & LORENE T	<b>179</b>
CITY OF ST. LOUIS	<b>180</b>
METROPOLITAN PARK & RECREATION DST	<b>181</b>
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TRAILNET INC	<b>184</b>
ASHLEY ENERGY LLC	<b>185</b>
TERMINAL RAILROAD ASSOC	<b>186</b>
WIGGINS FERRY CO	<b>187</b>
WIGGINS FERRY COMPANY	<b>188</b>
WIGGINS FERRY CO	<b>189</b>
TERMINAL RAILROAD ASSN OF ST LOUIS	<b>190</b>
CITY OF ST. LOUIS	<b>191</b>
TERMINAL RAILROAD ASSOC	<b>192</b>
TERMINAL RAILROAD ASSOC	<b>193</b>
TERMINAL RAILROAD ASSN	<b>194</b>
WHARF - CITY BLOCK 233 LLC	<b>195</b>
TERMINAL RAILROAD ASSOC	<b>196</b>
ST LOUIS MERCHANTS BRIDGE TR RY CO	<b>197</b>

\*BOLD NUMBER INDICATES RECEIVED OWNERSHIP LETTERS

LETTERS CAN BE VIEWED HERE: [https://stlouishustle.com/downloads/Ownership\\_Letters.pdf](https://stlouishustle.com/downloads/Ownership_Letters.pdf)





## LINCOLN PARCEL OWNERS

NORFOLK & WESTERN RR	<b>1</b>	ERIE B & BRUCE C TOUCHETTE	37
CROSS CO CRIS	<b>2</b>	ERIE B & BRUCE C TOUCHETTE	38
WIGGINS FERRY CO	<b>3</b>	WIGGINS FERRY CO	<b>39</b>
WIGGINS FERRY CO	<b>4</b>	TUJAY INC	40
WIGGINS FERRY CO	<b>5</b>	WIGGINS FERRY CO	<b>41</b>
WIGGINS FERRY CO	<b>6</b>	TUJAY INC	42
WIGGINS FERRY CO	<b>7</b>	PETROLEUM FUEL & TERMINAL CO	<b>43</b>
WIGGINS FERRY CO	<b>8</b>	MID AMERICA REAL ESTATE & DEVE	44
WIGGINS FERRY CO	<b>9</b>	CARGILL INCORPORATED	45
ELAINE CUETO	<b>10</b>	ARROW REALTY INC	46
ELAINE CUETO	<b>11</b>	WIGGINS FERRY CO	<b>47</b>
WIGGINS FERRY CO	<b>12</b>	SCHOOL DISTRICT 189	48
WIGGINS FERRY CO	<b>13</b>	PETROLEUM FUEL & TERMINAL CO	<b>49</b>
WIGGINS FERRY CO	<b>14</b>	BI-STATE DEVEL AGENCY	50
WIGGINS FERRY CO	<b>15</b>	BI-STATE DEVEL AGENCY	51
E J SIERON	16	BI-STATE DEVEL AGENCY	52
WIGGINS FERRY CO	<b>17</b>	BI-STATE DEVEL AGENCY	53
WIGGINS FERRY CO	<b>18</b>	BI-STATE DEVEL AGENCY	54
MID AMERICA REAL ESTATE & DEVE	19	JAMES L ROWE	55
WIGGINS FERRY CO	<b>20</b>	JAMES L ROWE	56
ERIE B & BRUCE C TOUCHETTE	21	GLP MIDWEST PROPERTIES I LLC	<b>57</b>
ERIE B & BRUCE C TOUCHETTE	22	BI-STATE DEVEL AGENCY	58
WIGGINS FERRY CO	<b>23</b>	MCI TELECOMMUNICATIONS CORP	59
ERIE B & BRUCE C TOUCHETTE	24	M C I TELECPMUNICATIONS INC	60
ERIE B & BRUCE C TOUCHETTE	25	MCI TELECOMMUNICATION INC	61
ERIE B & BRUCE C TOUCHETTE	26	CITY OF E ST LOUIS	<b>62</b>
ERIE B & BRUCE C TOUCHETTE	27	BI-STATE DEVEL AGENCY	<b>63</b>
ERIE B & BRUCE C TOUCHETTE	28	BI-STATE DEVEL AGENCY	<b>64</b>
ERIE B & BRUCE C TOUCHETTE	29	BI-STATE DEVEL AGENCY	<b>65</b>
WIGGINS FERRY CO	<b>30</b>	GLP MIDWEST PROPERTIES I LLC	<b>66</b>
TUJAY INC	31	CITY OF E ST LOUIS	<b>67</b>
WIGGINS FERRY CO	32	GLP MIDWEST PROPERTIES I LLC	<b>68</b>
TUJAY INC	33	WIGGINS FERRY CO	<b>69</b>
WIGGINS FERRY CO	34	GLP MIDWEST PROPERTIES I LLC	<b>70</b>
ERIE B & BRUCE C TOUCHETTE	35	GLP MIDWEST PROPERTIES I LLC	<b>71</b>
WIGGINS FERRY CO	36		

\***BOLD** NUMBER INDICATES RECEIVED OWNERSHIP LETTERS

LETTERS CAN BE VIEWED HERE: [https://stlouishustle.com/downloads/Ownership\\_Letters.pdf](https://stlouishustle.com/downloads/Ownership_Letters.pdf)





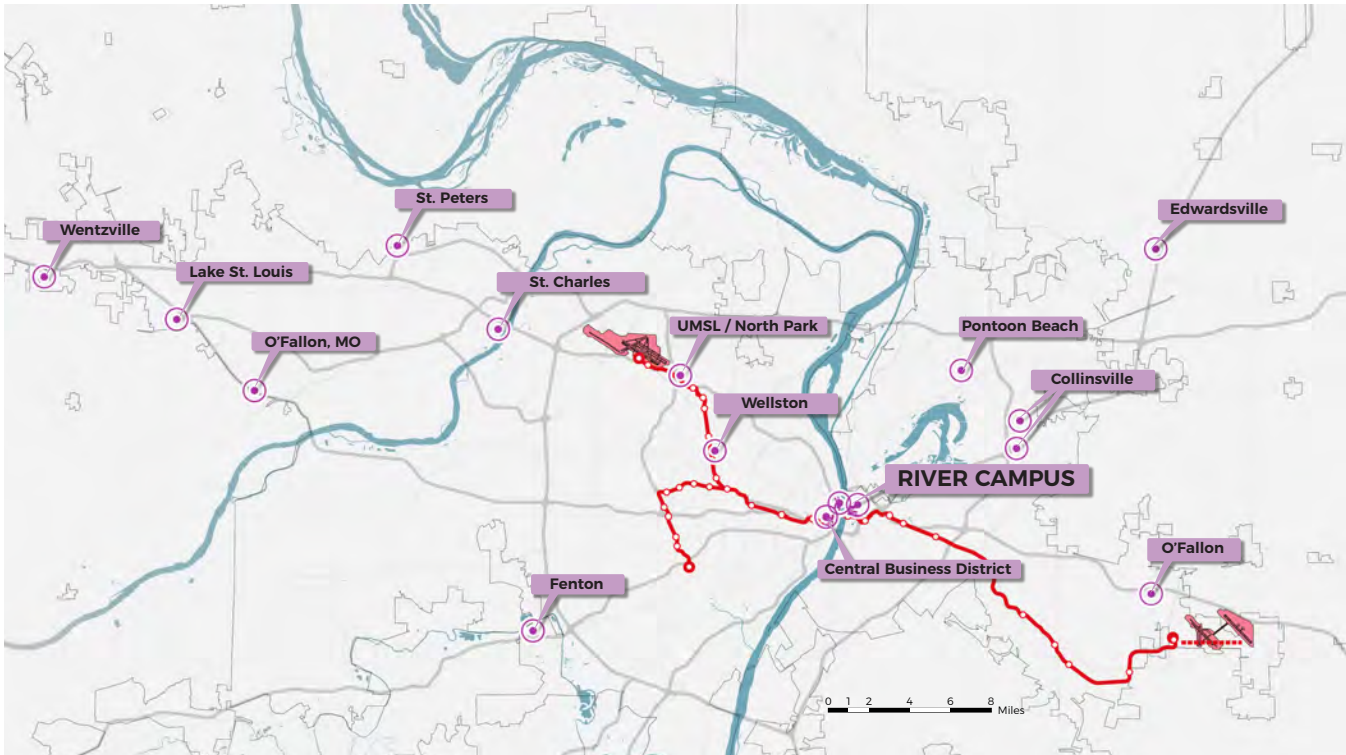
## CITY CENTER-CBD PARCEL OWNERS

STL BOA PLAZA, LLC	<b>1</b>	ST LOUIS SEVENTH & CERRE LLC	<b>33</b>
GATEWAY REGAL HOLDINGS LLC	<b>2</b>	NNN GATEWAY ONE LLC & ETAL	<b>34</b>
STATE OF MISSOURI	<b>3</b>	UGP-KIENER/STADIUM PARKING LLC	<b>35</b>
STATE OF MISSOURI	<b>4</b>	CITY OF ST. LOUIS	<b>36</b>
CITY OF ST. LOUIS MALL	<b>5</b>	CITY OF ST. LOUIS (LCRA)	<b>37</b>
UGP-KIENER/STADIUM PARKING LLC	<b>6</b>	FRISCO ASSOCIATES LP	<b>38</b>
CITY OF ST. LOUIS (LCRA)	<b>7</b>	ST LOUIS PARKING CO	<b>39</b>
HH ST LOUIS RAILWAY LP	<b>8</b>	PINE INVESTMENT COMPANY	<b>40</b>
S & P HOLDINGS LLC	<b>9</b>	PINE INVESTMENT COMPANY	<b>41</b>
HH ST. LOUIS RAILWAY LP	<b>10</b>	US BANK NA TRS	<b>42</b>
TOBER, NEIL TRS	<b>11</b>	CITY OF ST. LOUIS	<b>43</b>
HH ST. LOUIS RAILWAY LP	<b>12</b>	CITY OF ST. LOUIS	<b>44</b>
C A G PROPERTIES LLC	<b>13</b>	CITY OF ST. LOUIS	<b>45</b>
POSLOSKY, KENNETH & LUCILLE M TRS	<b>14</b>	CITY OF ST. LOUIS	<b>46</b>
HH ST LOUIS RAILWAY LP	<b>15</b>	CITY OF ST. LOUIS	<b>47</b>
ANGELOS, JAMES	<b>16</b>	CUPPLES PARKING LLC	<b>48</b>
HH ST LOUIS RAILWAY LP	<b>17</b>	CUPPLES PARKING LLC	<b>49</b>
BERKLEY, JACK & CATHERINE A	<b>18</b>	CITY OF ST. LOUIS (LCRA)	<b>50</b>
HH ST LOUIS RAILWAY LP	<b>19</b>	METROPOLITAN PARK & RECREATION	<b>51</b>
HH ST LOUIS RAILWAY LP	<b>20</b>	BI STATE DEVELOPMENT	<b>52</b>
UGP-KIENER WEST LLC	<b>21</b>	METROPOLITAN PARK & RECREATION	<b>53</b>
CITY OF ST. LOUIS	<b>22</b>	CITY OF ST. LOUIS (LCRA)	<b>54</b>
SOUTHERN REAL ESTATE & FINANCIAL CO	<b>23</b>	CUPPLES 9 SUBTENANT LLC & BI STATE	<b>55</b>
SOUTHWESTERN BELL TELEPHONE	<b>24</b>	BI STATE DEV AGENCY OF MO-IL &	<b>56</b>
RCDA LLC	<b>25</b>	MO HWY COMM	<b>57</b>
KNUCKLE BALL LLC	<b>26</b>	SOUTHWESTERN BELL TELEPHONE	<b>58</b>
BALLPARK PARKING LLC	<b>27</b>	STL MARKET BNK LLC	<b>59</b>
STATE OF MISSOURI	<b>28</b>	BALLPARK VILLAGE HOLDINGS BLOCK	<b>60</b>
BALLPARK PARKING LLC	<b>29</b>	UGP-KIENER/STADIUM PARKING LLC	<b>61</b>
BALLPARK PARKING LLC	<b>30</b>	MVP ST LOUIS CARDINAL LOT	<b>62</b>
ST LOUIS SEVENTH & CERRE LLC	<b>31</b>		
BALLPARK PARKING LLC	<b>32</b>		

**\*BOLD** NUMBER INDICATES RECEIVED OWNERSHIP LETTERS

LETTERS CAN BE VIEWED HERE: [https://stlouishustle.com/downloads/Ownership\\_Letters.pdf](https://stlouishustle.com/downloads/Ownership_Letters.pdf)

## Alternate Amazon HQ2 Potential Sites:



### Central Business District

#### **Site:**

The Central Business District is an assemblage of land, parking structures, and existing buildings that are candidates for demolition and/or renovation. The site is bikable and walkable.

The Central Business District has immediate connectivity on light rail to St. Louis Lambert International Airport and MidAmerica St. Louis Airport.

#### **Transportation:**

*Nearest Interstate:* 4 interstates front the site

*Nearest Four-Lane Highway:* 4 four-lane roads fronts the site

*Nearest Commercial Airport:* St. Louis Lambert International Airport is 18.4 miles (23 minutes)

#### **Utilities:**

*Electrical Distribution:* Ameren

*Natural Gas Distribution:* Spire

*Water:* Missouri American Water

*Sewer:* Metropolitan St. Louis Sewer District

*Local Telecommunications Service:* AT&T, Verizon, Sprint

### Collinsville Site #1, IL

#### **Site:**

Single ownership over 100 acres. Site access is in place; fast-track permitting process in place. Within 30 miles proximity to major population center.

#### **Transportation:**

*Nearest Interstate:* Within 2 miles

*Proximity to major highways and arterial roads:* Within 2 miles

*Nearest Commercial Airport:* St. Louis Lambert International (45 minutes); MidAmerica Airport is 17 miles (22 minutes)

#### **Utilities:**

*Electric:* Ameren IL

*Natural Gas:* Ameren IL

*Water:* Collinsville Water

*Wastewater:* Caseyville Township Sewer District



## Collinsville Site #2, IL

### **Site:**

Single ownership over 100 acres, pad-ready; site access in place.  
Fast-track permitting process in place. Within 30 mile proximity to major population center.

### **Transportation:**

*Nearest Interstate:* Within 2 miles  
*Proximity to major highways and arterial roads:* Within 2 miles  
*Nearest Commercial Airport:* St. Louis Lambert International (45 minutes)

### **Utilities:**

*Electric:* Ameren IL  
*Natural Gas:* Ameren IL  
*Water:* Collinsville Water  
*Wastewater:* Caseyville Township Sewer District

## Edwardsville, IL

### **Site:**

There are two landowners, with commercial and office zoning in place.

### **Transportation:**

*Nearest Interstate:* Within 2 miles  
*Proximity to major highways and arterial roads:* Within 2 miles  
*Nearest Commercial Airport:* St. Louis Lambert International Airport (45 minutes); MidAmerica Airport is 27 miles (37 minutes)

### **Utilities:**

*Electric:* Southwestern Electric Cooperative  
*Natural Gas:* Ameren IL  
*Water:* Edwardsville  
*Wastewater:* Edwardsville

## Fenton, MO

### **Site:**

A former Chrysler plant, now Fenton Logistics Park, with more than 200 acres. All utilities and infrastructure are in place. The site is not on MetroLink but easily accessible to major interstate highways. One land owner; site access is in place; fast-track permitting process in place.

### **Transportation:**

*Nearest Interstate:* Interstate 44 fronts the site  
*Nearest 4-Lane Highway:* a 4-lane road fronts the site  
*Nearest Commercial Airport:* St. Louis Lambert International Airport is 34 miles

### **Utilities:**

*Electrical Distribution:* Ameren  
*Natural Gas Distribution:* Spire  
*Water:* Missouri American Water  
*Sewer:* Metropolitan St. Louis Sewer District  
*Local Telecommunications Service:* AT&T, Verizon, Sprint

## Lake St. Louis, MO

### **Site:**

This site is 233 acres of land controlled by two owners that want to sell the land. There are letters from the owners' real estate brokers attesting to the owners' interest in selling the property. This land can be subdivided if desired. The property is not developed but is serviced by all of the utilities. The city will zone the site so some of the 233 acres can be residential if required.

The sites are currently zoned Highway Commercial and could change within 90 days.

### **Transportation:**

*Nearest Interstate:* Adjacent to Interstate 64  
*Nearest 4-Lane Highway:* Adjacent to MO-364  
*Nearest Commercial Airport:* St. Louis Lambert International Airport is 25 miles (28 minutes) west

### **Utilities:**

*Electrical Distribution:* Cuiver River Electric Cooperative  
*Natural Gas Distribution:* Spire  
*Water:* Public Water and Sewer District #2  
*Sewer:* Duckett Creek Sanitary District and Sewer District #2  
*Local Telecommunications Service:* Charter Communication

## O'Fallon, IL

### **Site:**

100 acres; site access in place. Fast-track permitting in place. All utilities run to the site and are under one owner.

### **Transportation:**

*Nearest Interstate:* Interstate 64 (.3 miles)  
*Proximity to major highways and arterial roads:* Interstate 64 Frontage; serviced by Exits 19 & 21  
*Proximity to mass transit:* Light rail station less than 3 miles from site; bus service on-site  
*Nearest Commercial Airport:* St. Louis Lambert International (28.6 miles); 4 miles to MidAmerica St. Louis Airport (BLV)

**Utilities:**

*Electric:* Ameren IL

*Natural Gas:* Ameren IL

*Water:* O'Fallon Water

*Wastewater:* Caseyville Township Sewer District

## O'Fallon, MO

**Site:**

223.6 acres

**Transportation:**

*Nearest Interstate:* Interstate 64 (.3 miles)

*Nearest 4-Lane Highway:* Highway DD (.3 miles)

*Nearest Commercial Airport:* St. Louis Lambert International (20 miles)

**Utilities:**

*Electrical Distribution:* Cuiver River Electric Cooperative

*Natural Gas Distribution:* Ameren Missouri

*Water:* Alliance Water Resources, Inc., Public Water Supply

*Sewer:* Duckett Creek Sanitary District and Sewer District #2

## Pontoon Beach, IL

**Site:**

The site includes 595 total acres, over 480 developable. The site is level, zoned and Corps permitted. Mixed-use zoning allows for industrial, office and retail.

**Transportation:**

*Nearest Interstate:* Within 2 miles

*Proximity to major highways and arterial roads:* Less than .5 mile to Hwy. 270/Hwy. 111 interchange

*Nearest Commercial Airport:* St. Louis Lambert International (23 miles)

**Utilities:**

*Electric:* Ameren Services

*Gas:* Ameren Services

*Water:* Illinois American Water

*Wastewater:* Madison County Special Services

## St. Charles, MO

**Site:**

Identified as the Bangert Island Development area, this parcel includes 335 acres of Bangert Island, where much remains in its natural, vegetative state. Part of the site is zoned R-2 (less than 5 actual residents on site), remainder is zoned I-2. The city will rezone entire site to the benefit of Amazon. Rezoning will require 60 days.

**Transportation:**

*Nearest Interstate:* Interstate 70 is 1.4 miles away

*Nearest 4-Lane Highway:* MO-364 is 2.6 miles away

*Nearest Commercial Airport:* St. Louis Lambert International Airport is 8 miles (9 minutes)

**Utilities:**

*Electrical Distribution:* Ameren

*Natural Gas Distribution:* Spire

*Water:* City of St. Charles

*Sewer:* City of St. Charles

*Local Telecommunications Service:* Charter Communication

## St. Peters, MO

**Site:**

The site includes 239 acres controlled by two owners – The City of St. Peters owns 61.7 acres and the 370 Levee District owns 177.3 acres. The proposed campus site is a shovel-ready greenfield site.

Land uses in the vicinity of the site include Premier 370 Business Park, across Highway 370 and to the south.

The proposed corporate campus would comply with the existing zoning regulations and would be highly compatible with the existing land use; no special zoning approvals would be required. The city would support the addition of residential units within the Premier 370 development to create a “work-play-live” environment. The city would facilitate the construction of a road/trail network to allow connectivity between facilities – an important feature of a corporate campus.



The adjacent 300-acre park includes a 140-acre recreational lake with fishing and boating, a 5.5-mile walking/biking trail surrounding the lake, and an RV park. The park also features a playground, family picnic areas, a corporate pavilion, sand volleyball, an archery range, and a dog park.

**Transportation:**

*Nearest Interstate:* Interstate 64 (.3 miles)

*Proximity to major highways and arterial roads:* Adjacent to Route 370, which is 1.6 miles from Interstate 70

*Proximity to major arterial roads:* Site connects to Lakeside Park Drive and Salt River Road; both roads connect to Route 370

*Nearest Commercial Airport:* St. Louis Lambert International (13 miles)

**Utilities:**

*Water and Sanitary Sewer:* City of St. Peters

*Stormwater management:* City of St. Peters

*Electric:* Ameren

*Natural Gas:* Spire

*Telephone Service:* AT&T

## University of Missouri/ North Park, MO

**Site:**

The UMSL/NorthPark Campus is immediately east of Lambert Airport and contiguous to the University of Missouri's main campus in St. Louis and the world headquarters of Express Scripts. The land is completely entitled, zoned, and pad-ready, available for immediate commencement of construction. The site is located in St. Louis County, has its own MetroLink station, and is planned and approved for an additional station.

**Transportation:**

*Nearest Interstate:* Interstate 70 fronts the site

*Nearest 4-Lane Highway:* Hanley Road intersects with all arterial roads in North Park

*Nearest Commercial Airport:* St. Louis Lambert International Airport (3.9 miles)

**Utilities:**

*Electrical Distribution:* Ameren

*Natural Gas Distribution:* Spire

*Water:* Missouri American Water

*Sewer:* Metropolitan St. Louis Sewer District

*Local Telecommunications Service:* AT&T, Verizon, Sprint

## Wentzville, MO

**Site:**

The property is 195 acres and will have direct access to the new David Hoekel Parkway (DHP). Beautiful rolling acres fronting I-70 and two adjacent thoroughfares. This site is located in the City of Wentzville, the "Crossroads to the Nation." Great access and visibility for a destination site, or an office or medical campus. Some Interstate 70 frontage, and contiguous to additional 25-acre site with I-70 frontage.

The DHP project is a \$22 million, fully directional interchange, which should be completed by 2020. The project is fully funded. The new interchange will allow direct access to Interstate 70, with indirect access to Interstate 64 through an arterial roadway system (Wilmer Road). The trace is a greenfield site with no known major obstacles to development. In conjunction with the interchange, the tract will have access to both water and wastewater service.

**Transportation:**

*Nearest Interstate:* Interstate 70 is 1.4 miles away

*Nearest 4-Lane Highway:* MO-364 is 2.6 miles away

*Nearest Commercial Airport:* St. Louis Lambert International Airport is 8 miles (9 minutes)

**Utilities:**

*Electrical Distribution:* Ameren

*Natural Gas Distribution:* Spire

*Water:* City of Wentzville

*Sewer:* City of Wentzville

*Local Telecommunications Service:* CenturyLink



**Rhonda Hamm-Niebruegge**  
**DIRECTOR**

October 4, 2017

St. Louis Development Corporation  
1520 Market Street  
St. Louis, Missouri 63103

St. Louis Economic Development Partnership  
7733 Forsyth Boulevard, Suite 2200  
St. Louis, Missouri 63105

Re: Amazon HQ2 – Development of a Welcome and Training Center at the Airport

To Whom It May Concern:

St. Louis Lambert International Airport and its Airport Commissioners are extremely excited to see that St. Louis is submitting a comprehensive proposal to be the location of the Amazon HQ2 project. St. Louis has many great attributes and the St. Louis Lambert International Airport is just one of those attributes.

The Airport controls in excess of 4,000 acres, including property adjoining Terminal 2 and the adjacent garage as depicted in the attached drawings (the "Property"). We believe that a Welcome and Training Center on the Property would present a great opportunity to both Amazon and St. Louis to bring in potential talent from all over the world, conduct interviews, for recruiting and training, and perform other important company functions without leaving the Airport grounds.

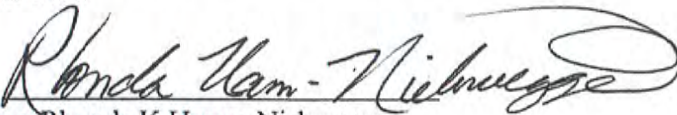
In addition, the Property is immediately adjacent to the Airport station on the Metrolink and would provide easy access to any stop along the 46-mile system including stops in Missouri and Illinois that could become part of the Amazon HQ2 project.

If St. Louis is chosen, the Airport will support the development effort and cooperate with Amazon and others to ensure a successful outcome for all parties and promptly seek any necessary approvals for such development.

Furthermore, the Airport pledges not to disclose Amazon's potential interest in the Property to public forums and with the media, and, upon request from Amazon or the St. Louis Economic Development Partnership, will enter into a mutually agreeable non-disclosure agreement.

Very truly yours,

**ST. LOUIS LAMBERT INTERNATIONAL  
AIRPORT**

By: 

Name: Rhonda K Hamm-Niebruegge

Title: Airport Director and Chairman of the  
Airport Commission



A close-up photograph of a child's face and hand as they eat a large ice cream sandwich. The child is wearing a red, white, and blue striped shirt. The ice cream sandwich has white vanilla ice cream and is covered in colorful sprinkles. The child's hand is holding the sandwich, and their mouth is open, taking a bite. The background is a blurred green field.

# INCENTIVES





# INCENTIVES

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*“I have developed urban innovation districts in three cities and can say, without reservation, that St. Louis is the most innovative, creative and cooperative.”*

– Dennis E. Lower  
President & CEO, Cortex Innovation District

How is St. Louis cost competitive?

From Day One, St. Louis can deliver the lowest overall cost, not only in terms of capital outlay, but also in long-term operating costs to the benefit of Amazon.

When our region’s cost of business is combined with our low cost of living and our comprehensive, innovative incentive programs, St. Louis offers a compelling business case for Amazon’s HQ2.

The value proposition offered by St. Louis includes the region’s general business climate, tax structure, and nontax cost of doing business, all of which multiply the value of the incentive packages.

Moreover, St. Louis is committed to leveraging the economic impact of Amazon HQ2 to catalyze mutually beneficial improvements to our education and transportation infrastructure, including our goal of making St. Louis a hub for the Hyperloop. Such educational improvements provide an opportunity to explore the use of Social Impact Bonds, which would engage public and private investors who seek the dual benefit of fixed-income investments coupled with measurable social impact.

Calculation of Missouri Incentives Offering

“We are on a mission to make Missouri a best-in-class state to do business. We’ve taken bold action, and we’re getting results. Now, Missouri can compete with any state in the nation to win quality jobs for Missouri families, and we compete for every job. This is an exciting opportunity, and we’re fighting to win.”

— Governor Eric Greitens

Missouri Summary

State of Missouri	\$2.429 billion
City of St. Louis	\$1.331 billion
St. Louis County*	\$56.5 million
<b>TOTAL</b>	<b>\$3.82 billion</b>

\*St. Louis County and St. Louis City are geographically adjacent, but separate jurisdictions. The incentives offered from St. Louis County apply to real estate investments in St. Louis County, specifically the proposed Welcome and Conference Center at St. Louis Lambert International Airport. Should Amazon want additional development in St. Louis County, St. Louis County’s incentive package and value would change accordingly.

Calculation of Illinois Incentives Offering

“Illinois offers a vibrant business community. Our state’s culture of ingenuity and innovation attracts the nation’s brightest minds. With nearly a fourth of the state’s working-age population completing postsecondary education, Illinois is one of the most educated populations in the Midwest.”

— Governor Bruce Rauner

Illinois Summary

State of Illinois	\$927 million
St. Clair County	\$700 million
<b>TOTAL</b>	<b>\$1.627 billion</b>

The State of Illinois’ incentives are based on existing programs that do not need new legislation. This estimate can be expanded once project specific information is available. For example, a disadvantaged location would increase the Edge benefit by 25 percent, and remediation and training credits would also be available. These estimates are based on 100 percent of the project being located in Illinois; generally the impact can be proportionately adjusted if split between Illinois and Missouri. The Illinois General Assembly is anticipating additional possible incentives should Amazon HQ2 come to Illinois.



# Incentives Approach

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The public leaders of the 15 counties that comprise the St. Louis MSA are energized by the scale of Amazon's HQ2, and are motivated to develop an economic development package that reflects the scale of the opportunity. Legislative activity required to incentivize Amazon's expansion to the St. Louis metro area is a priority for elected officials in Illinois and Missouri. Conversations are already underway in both states as part of pre-2018 legislative session work.

The proposed River Campus includes 100 acres in Missouri and an additional 100 acres immediately across the Mississippi River in Southwestern Illinois. The proposed Amazon Tower includes 1.1 million of existing square-feet in the Central Business District in Downtown St. Louis. Proposed sites in Missouri would result in combined state and local incentives of an amount greater than \$3.8 billion. Proposed sites in Southwestern Illinois would result in combined state and local incentives of an amount greater than \$1.6 billion.

The proposed River Campus offers Amazon over 100 acres in Missouri and an additional 100 acres across the Mississippi River in Southwestern Illinois. Amazon's HQ2 campus in Missouri would result in combined state and local incentives of an amount greater than \$3.8 billion. Amazon's HQ2 campus in Southwestern Illinois would result in combined state and local incentives of an amount greater than \$1.6 billion.

A development boundary larger than Amazon's HQ2 can be established to capture the direct and indirect value provided by the additional economic activity engendered by the HQ2 project. For example, the River Campus could be included within a larger Innovation District Enterprise Zone.

Amazon, even in the first phase, easily exceeds all eligibility requirements in Missouri and Illinois.

Incentives for HQ2 are flexible in that they are:

- Tied to jobs created and investment made
- Scaled accordingly as expansion occurs and employees are hired from specific

employment pools, and as goals regarding levels of employment are achieved

- Able to be monetized to provide upfront support or year-by-year support
- Focused on important elements of Amazon's operations, such as training and infrastructure development
- Not limited to the Amazon campus

## Incentive Timelines

Timelines, approvals, and required legislation are detailed in the packages provided by Missouri and Illinois.

## Evidence that Missouri and Illinois Can Deliver Incentives

Missouri and St. Louis have a demonstrated track record of success closing transactions to retain automotive jobs at Ford and GM, expanding the Western Headquarters of the National Geospatial Intelligence Agency, and supporting the relocation efforts for Boeing, Bombardier, and Cerner. We address more future needs and timelines in Sections 3 and 4 of this proposal.

Illinois and St. Clair County have a demonstrated track record of attracting business to locate or stay in the State, including major companies such as Zurich North American HQ, Capital One, Conagra, eBay, and three Amazon developments.

## Explanation of Tax Credits

- Tax credits issued in Missouri or Illinois are most often refunded as a direct offset of the holder's corporate income or other tax paid to the state.
- Nonrefundable state tax credits are transferable and can be refunded by selling to another party, usually at a discount. There are ready buyers for state tax credits available at any time.
- Once issued, tax credits may be held for several years, usually three to five years before they sunset.

## Description of the Incentive Offering from The State of Missouri

The following incentives are supported by the Governor and legislative leadership. Please see Missouri's proposal in the Addendum to this section for additional detail.

SOURCE OF INCENTIVE/TYPE - STATE OF MISSOURI	VALUE
<b>Invest Missouri</b> - refundable tax credits to offset capital costs based on an increasing percentage, up to 6.2 percent, of payroll.	\$1.36 billion
<b>Reinvest Missouri</b> - additional refundable tax credits to offset capital costs based on additional .5 percent of payroll for investments in Missouri distressed areas.	\$151.5 million
<b>Missouri Miles4</b> - refundable tax credit equal to 40 percent of contributions to Missouri rural broadband deployment to be used for workforce development	\$100 million
<b>Missouri Talent</b> - workforce recruitment incentive which permits an individual income tax deduction for up to 25,000 employees relocating to Missouri	\$125 million
<b>Next Generation Missouri</b> - refundable tax credit equal to 30 percent of contributions to qualified Missouri STEM projects	\$100 million
<b>Missouri Mutual Partners</b> - capital pool for investments in Missouri infrastructure, entrepreneurship, education and other mutually beneficial public needs, funded by the sale or transfer of refundable tax credits — up to 50 percent may be held in applicant securities.	\$400 million
<b>Missouri HQ</b> - refundable tax credit equal to the cost incurred or tax paid attributable to the repatriation of foreign capital to the US, when used to establish or expand a headquarters in Missouri	\$200 million
<b>TOTAL INCENTIVES FOR STATE OF MISSOURI</b>	<b>\$2.429 billion</b>

## Description of the Incentive Offering from The City of St. Louis

The following incentives are proposed by the City of St. Louis, Mo. Please see additional detail on each of the programs listed below in the Addendum to this section, along with letters of support concerning this package from the City of St. Louis. All incentives are based on 5,000 jobs and one million square-feet. These incentives will scale by a factor of 10 when Amazon has 50,000 employees and 10 million square feet of office space. Earnings tax estimates are based on a base salary of \$100,000. Some of the proposed incentives could take the form of Community Benefit Agreements (CBA).

SOURCE OF INCENTIVE/TYPE - CITY OF ST. LOUIS, MISSOURI	BASE VALUE 5,000 JOBS 1M SQUARE FEET	FULL BUILDOUT 50,000 JOBS 10M SQUARE FEET
<b>Real Property Tax Reduction</b> - at least a 50 percent reduction for the first 15 years for each building	\$36 million	\$360 million
<b>Personal Property Tax Reduction</b> - at least a 50 percent reduction for the life of the assets	\$2.1 million	\$21 million
<b>Education Fund</b> - 20 percent of the Real Estate and Personal Property Taxes paid will be applied to education activities aimed at developing the workforce of the future	\$7.6 million	\$76 million
<b>Sales Tax on Personal Property and Construction Materials</b> - at least a 50 percent reduction in taxes on personal property and construction materials purchased	\$9.7 million	\$97 million
<b>Building Permit Fees</b> - at least a 50 percent reduction	\$0.9 million	\$9 million
<b>Infrastructure Fund</b> - 20 percent of the Sales Tax on Personal Property and Construction Materials and Building Permit Fees paid will be applied to infrastructure and transportation-related improvements	\$1.9 million	\$19 million
<b>Employee Earnings Tax and Employer Payroll Tax Reduction</b> - Rebate to Amazon of at least 50 percent of the 1 percent earnings tax paid by Amazon employees and 50 percent of the 1/2 percent payroll tax paid by Amazon for the first 15 years of operations, and a gradual increase in such taxes over a stated time frame; the rebates shall be at least 75 percent for employees that meet stated "low-to-moderate" income or other specified thresholds or requirements	\$57 million	\$570 million
<b>TOTAL RECURRING INCENTIVES FOR CITY OF ST. LOUIS</b>	<b>\$115.2 million</b>	<b>\$1.152 billion</b>



## Detail Regarding Other Free or Reduced Land Building Costs

The City of St. Louis also proposes numerous one-time, nonrecurring incentives, similar to free land or reduced cost, to encourage Amazon to see immediate benefit in locating HQ2 in the proposed River Campus in the urban core.

SOURCE OF ONE TIME INCENTIVES – CITY OF ST. LOUIS, MISSOURI	VALUE
<b>Provide Amazon Tower</b> (the first building at 909 Chestnut) at a \$20M purchase price, which is dramatically lower than the cost of new construction	\$110 million
<b>Parking for Amazon Tower</b> - City commits to provide at least 1,250 parking spaces within two blocks of the Amazon Tower within 24 months of being selected for HQ2, and to identify alternate parking arrangements along MetroLink routes prior to the availability of additional parking spaces Downtown	\$54 million
<b>Land Bank</b> - the City and its land bank (Land Reutilization Authority or LRA) commit to making a large number of parcels of land available on an affordable basis for housing development by developers identified and approved in a public/private partnership in a manner to be determined	\$15 million
<b>Total of non-recurring incentives</b>	\$179 million
<b>GRAND TOTAL OF RECURRING AND ONE TIME INCENTIVES 50,000 JOBS AND 10M SQUARE FEET</b>	<b>\$1.331 billion</b>

In addition, the City of St. Louis proposes the following incentives to benefit Amazon; however, more information is needed to provide value to Amazon relative to the proposed River Campus.

**Corporate Tax Reduction** - at least a 50 percent reduction for the first 15 years of operations and a gradual increase over a stated timeframe.

**AmerenUE Economic Development Electricity Rate** - meet or exceed any competing rate offered Amazon down to Ameren's incremental cost to serve.

## Description of the Incentive Offering from St. Louis County

The proposed Amazon Welcome and Conference Center at St. Louis Lambert International Airport is located in St. Louis County. As a result, St. Louis County, MO has assembled an incentive package for the construction of a new, 365,000-square-foot combination hotel, office, and conference facility over the existing MetroLink mass transit track at the Southwest Terminal, at an estimated cost of \$380 per square foot.

SOURCE OF INCENTIVE/TYPE – ST. LOUIS COUNTY	VALUE
<b>Real Property Tax Reduction</b> – at least a 50 percent reduction for 15 years	\$49 million
<b>Personal Property Tax Reduction</b> – at least a 50 percent reduction for the life of the property	\$1.7 million
<b>Sales Tax on Personal Property</b> - 100 percent reduction in taxes on personal property purchased	\$1.2 million
<b>Sales Tax on Construction Materials</b> - a 100 percent reduction in taxes on construction materials purchased	\$4.60 million
<b>GRAND TOTAL OF INCENTIVES FOR AMAZON WELCOME AND CONFERENCE CENTER</b>	<b>\$56.5 million</b>

## Description of the Incentive Offering from the State of Illinois & St. Clair County

The following incentives are proposed by the State of Illinois and St. Clair County, IL. Please see additional detail on each of the programs listed below in the Addendum to this section along with a letter of support concerning this package from St. Clair County Board Chair, Mark Kern. All incentives are based on 50,000 jobs and 10 million square-feet. Various business development and incentive programs are available in the State of Illinois (and locally) based on the anticipated economic impact of an applicant. The programs listed below require administrative and/or local approval by the St. Clair County Board and/or East St. Louis City Council.

SOURCE OF INCENTIVE/TYPE - STATE OF ILLINOIS & ST. CLAIR COUNTY	BASED ON 50,000 JOBS 10 M SQUARE FEET
<b>High Impact Business Program (HIB)*</b> - Companies that make a minimum investment of \$12 million in project capital expenditures and create 500 or more full-time jobs in Illinois are eligible. Businesses qualify for an investment tax credit, building material sales tax exemption, and utility tax exemptions.	\$786 million
<b>Edge Redevelopment Zone*</b> - Investment tax credit, .5 percent credit against state income tax for investment in qualified property	\$66 million
<b>Sales Tax Deduction</b> - Exemption on Sales Tax on Building Materials	\$75 million
<b>Job Tax Credit</b> - \$500 per eligible employee hired	\$ in Edge
<b>Remediation Tax Credit</b> - a tax credit equal to 25 percent of the eligible remediation costs	Requires more information from Amazon
<b>Real Property Tax Reduction</b> - at least a 50 percent reduction for 20 years for each building.	\$700 million
<b>GRAND TOTAL FOR 50,000 JOBS AND 10M SQUARE FEET</b>	<b>\$1.627 billion</b>

\* HIB & River Edge incentives cannot be combined; it is one or the other.

Please note that Illinois does not have any personal property tax.

## Initial Cost and Tax Structure

The nonprofit Tax Foundation annually compares tax structures among states and assigns a ranking. In its 2017 report, the Tax Foundation found Missouri to be 15th overall in Business Tax Climate and Illinois to be 23rd overall. In comparison, the Tax Foundation ranked the state of Washington 17th overall. Importantly for Amazon, Missouri is ranked 5th in the nation in corporate income tax structure and 7th in property tax. Illinois compares nearly as favorably in 10th place. Washington State is in 6th place with respect to personal income tax structure. Missouri's personal income tax ranking (28th) does not yet reflect the annual .1 percent phased reduction in personal income tax authorized by the Missouri legislature in 2015, which will be implemented beginning in 2018.

Missouri's corporate income tax rate is a flat 6.25 percent. However, Missouri permits one-half of federal income tax payments to be deducted prior to computing Missouri taxable income, leading to an effective Missouri corporate income tax rate of 5.2 percent. Only income earned in Missouri is taxable in Missouri. To make this determination, Missouri affords two allocation options to the corporation – a three-factor test based on sales, payroll, and property, or a single-factor test based only on sales. Missouri has completely phased out its separate corporate franchise tax, effective with the 2016 tax year. Missouri's personal income tax is \$325 plus a flat six percent of federal adjusted gross income over \$9,000. Beginning in 2018, Missouri will experience an annual percent reduction on personal income tax, down to 5.5 percent.



In Illinois, the corporate income tax rate is 7.75 percent, consisting of a 5.25 percent state income tax and a 2.5 percent personal property tax replacement (lower if the corporation is organized as an S Corp, partnership or trust). As with Missouri, only income earned in Illinois is taxable in Illinois, and Illinois uses a single-factor test based on in-state sales to make this determination. Illinois' personal income tax is 3.75 percent of Illinois taxable income, which is federal taxable income with some state-specific modifications. Illinois retains a corporate franchise tax of .15 percent of paid-in capital, and thereafter, a .1 percent annual tax of paid-in capital, up to two million dollars.

Real property tax on commercial and industrial parcels in the City of St. Louis is assessed on 32 percent of market value. The total tax applied is \$9.9156 per \$100 of assessed valuation. Personal property in the City of St. Louis is assessed on 33 1/3 percent of market value. The total tax applied is \$8.2756 per \$100 of assessed valuation. These taxes fund local public schools, our remarkable zoo and museum district, sheltered workshops for the disabled, community colleges, mental health programs, children's services, and libraries, among other assets.

In St. Clair County, Ill., real property tax on commercial and industrial parcels is assessed on 33 1/3 percent of market value. The total tax applied at the proposed HQ2 site is \$17.0888 per \$100 of assessed valuation. There is no personal property tax assessment in Illinois.

Sales taxes in the City of St. Louis total 9.179 percent. Nearly half of the sales tax rate derives from the State of Missouri's four percent sales tax on most goods. Also of note, within the overall sales tax rate, state and city voters have chosen to tax themselves to fund a number of important causes, such as: environmental conservation efforts (0.125 percent), state parks (0.1 percent), local parks (0.125 percent), regional parks (0.288 percent), public safety (0.5 percent), mass transit (1.0 percent), and more. The City of St. Louis and the State of Missouri impose a use tax of 8.513 percent on goods purchased out of state over an initial \$1,000 exemption limit. There are a number of legislatively enacted sales and use tax exclusions and exemptions that may be applicable to much of what Amazon purchases. A typical large corporation in Missouri experiences a materially lower effective sales/use tax rate compared to the rates identified above.

Sales taxes in St. Clair County, Ill. at the HQ2 site total 8.85 percent. Of that amount, 6.25 percent derives from the State of Illinois sales tax. Additional components of the sales tax come from county and municipal government (0.5 percent & 1.5 percent), the local transit agency (0.25 percent), and regional parks and flood prevention (0.10 percent & 0.25 percent). Illinois imposes a use tax of 6.25 percent on out-of-state purchases.

The City of St. Louis has a low corporate earnings tax, which largely will be rebated under our proposal, equivalent to one percent of net profits earned in the city, a business payroll expense tax equal to 0.5 percent of payroll attributed to work performed in the City, and a graduated business license tax of \$37,500 for employers with 501 or more employees. The City of St. Louis also implements a personal earnings tax equivalent to one percent of earnings accrued in the City for all residents and workers. The payroll and earnings taxes also will be rebated in large part, and since they are deductible, result in a very low impact on an after-tax basis.

## **Ongoing Cost of Doing Business in the St. Louis Region**

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### **Labor Costs**

Moody's Analytics ranks St. Louis as the eighth most cost-effective large U.S. city for businesses. The average tech talent across all classifications (wage for software development, programming, engineering, systems management, etc.), is \$87,174, according to the U.S. Bureau of Labor Statistics. Assuming 60 percent of the anticipated 50,000-person HQ2 labor force will work within a tech classification, and assuming a minimum savings of \$13,000 per job in tech wages for locating in St. Louis, we anticipate Amazon would save over \$390 million annually on salaries compared to Seattle. We believe this number is conservative and critical to the analysis of the St. Louis opportunity.

## Cost of Living

In October, the Federal Reserve Bank of St. Louis released updated statistical information (2015 data) on the cost of living in St. Louis. The Fed indicated St. Louis has the seventh-highest standard of living among the 53 largest U.S. metro areas. Forbes magazine recently reached a similar conclusion, ranking St. Louis #7 among the most affordable U.S. cities in 2017. Simply put, a dollar of personal income goes a long way in St. Louis. Nowhere is this more evident than housing, which is nearly 30 percent below the national average.

Due to our competitive cost of living and our ability to offer employers a strong talent pool for recruiting, several corporate partners have moved Information Technology departments to the St. Louis region, including Boeing, Nestlé Purina, Square, and KPMG. Moreover, our ability to affordably source tech talent is among the strongest reasons offered by the National Geospatial Intelligence Agency (NGA) in its decision to retain over 3,100 jobs and expand its second headquarters in the City of St. Louis. Please see the Letter of Support from the NGA in section 4 regarding their working relationship with the City of St. Louis.

With respect to nontechnical talent, the average wage in St. Louis is \$48,584, fourth lowest among all large U.S. cities. In fact, Foreign Direct Investment magazine recently labeled St. Louis seventh of the top 10 “Large American Cities of the Future” for human resources and talent. The region’s competitive cost of living has resulted in St. Louis attracting approximately 50 percent more of the 2,000 fastest growing private firms in the U.S., as indicated by its proportionate share of the U.S. population. Moreover, several recent publications have identified St. Louis as a strong and growing Midwestern and national hub for new business creation and entrepreneurship, including the respected FiveThirtyEight.com which offers that “St. Louis is the New Startup Frontier.”

## Real Estate

With respect to commercial real estate, a 2017Q2 snapshot of the current market by CBRE shows the average office rental rate per square foot is \$18.66 among all classes in St. Louis. The proposed River Campus Class A space rents will be among the lowest rates of

all major North American cities. Amazon will find real estate acquisition costs in the St. Louis region are a fraction of the costs in other cities.

## Utilities

### Steam

The proposed Amazon Tower has access to a highly efficient steam heating system. In addition, chilled water service can be provided for air-conditioning and other needs should demand be driven by Amazon and/or other customers in the urban core.

The power plant providing steam into the district energy system is a natural gas-fired cogeneration plant from which steam and electricity are simultaneously generated. The electricity generated by the power plant is sold into the power grid at wholesale, and the resulting steam is distributed to buildings via the steam loop.

This energy system is highly efficient and a sustainable way to heat and cool the buildings in the proposed River Campus. The combined steam heat and power plant can achieve energy efficiencies above 80 percent, which is far more efficient than a conventional power-only plant where two-thirds of the energy content of its fuel is exhausted as heat into oceans, rivers, and/or the atmosphere.

### Electric

AmerenUE provides electricity in the St. Louis region and offers electric utility rates 19 percent below the national average. Ameren Missouri has an Economic Development and Retention Rider enabling Ameren to meet or beat any competing energy rate. Please see the letter of support from Ameren at the end of this section.

Ameren Missouri recently announced its intent to embark upon a substantial expansion of its renewable energy portfolio, particularly from wind and solar sources, which will drive a predictable, low-cost utility rate for years to come as these technologies continue to improve cost efficiency.

In Illinois, electric customers may choose their energy supplier. Ameren Illinois has recently filed for a second consecutive rate decrease with Illinois regulators, and its average industrial rate is \$0.453/kwh, falling well below the national \$0.68/kwh average.



## **Gas**

Spire is the natural gas provider for much of the proposed River Campus. Spire will assign Amazon a key account manager to assist with rates and efficiency standards. The account manager will identify energy opportunities for Amazon, including qualifying rebates for energy efficiency measures, and will ensure the Spire system is adequate to service Amazon's HQ2.

Spire offers to cost-share the installation of any natural gas infrastructure Amazon determines is necessary to build out its ideal site. Spire will provide Amazon a special price on its service, which will include discounts up to of 30 percent on Spire's volumetric gas rates, declining over five years.

## **Water**

The St. Louis area has access to abundant sources of clean, fresh water. The St. Louis City municipal system supplies the proposed River Campus. In St. Louis County, Missouri-American Water supplies any facilities Amazon may construct in or around St. Louis Lambert International Airport. Both systems are members of the Partnership for Safe Water, an alliance of six drinking-water organizations affiliated with the American Water Works Association. As a result, St. Louis area customer satisfaction ratings for water quality are among the highest in the US.

## **Additional Potential Sources of Cost-Effective Utility Technologies**

### **Data Center Heat Exchange - Waste Heat Reclamation**

As Amazon already does in Seattle, the River Campus could use existing downtown data centers, built with the ability to reuse excess heat, to redirect and capture emissions from hot aisles for a variety of uses. These potentially could include: combustion air preheating; boiler feed water preheating; load preheating; power generation; and steam generation for use in space heating, water preheating, and transfer to liquid or gaseous process streams.

## **Hydrokinetic Power - In-Stream River Turbines**

Since St. Louis is the confluence of three rivers, including one of the world's major river systems - the Mississippi - it is the perfect location to harness the incredible power potential of water. The proposed River Campus could derive at least part of its electricity from river turbines, or run-of-river power, which produces electricity by diverting river flow through turbines that spin generators. The water is then returned downstream back to the river with no negative effects. The Mississippi has strong year-round water flow, and the potential for cost-effective and zero-carbon electricity production could be significant.

## **Biomass Generation**

The Mississippi also can be a helpful source of energy because of what's in the river. Scrap lumber, forest debris, crop debris, and waste residues can be captured and converted through a drying and burning process into a fuel source for a steam power plant. The proposed River Campus sites on the river are ideal locations for a biomass generation facility.

## **Geothermal**

Geothermal heating and cooling, also referred to as green heat, geoexchange, geothermal heat pumps (GPSs), ground-source heat pumps (GSHPs), and water source heat pumps, are additional technologies that can be integrated into the River Campus. Geothermal technology can save more than 70 percent on heating and cooling bills.

## **Greywater**

St. Louis adheres to the 2009 Uniform Plumbing Code, which only allows for untreated greywater reuse for irrigation, but not for toilet flushing (rainwater can be used for flushing toilets). The proposed River Campus would be an opportunity to push for changes to code to allow for systems similar to Living Machine systems, which treat wastewater for toilet flushing, significantly reducing the water usage in buildings.



**This incentives package  
cannot represent the  
very best we can do  
because:**

- The offerings from the State of Missouri and the State of Illinois cannot favor one location over another within each state; and
- We do not have enough detail about Amazon's real plans to dig deep and investigate every applicable program.

If given the opportunity to advance to the next level, the entire St. Louis regional team will challenge one another and state officials to leverage the competitiveness within our bi-state partnership to develop the most competitive incentive plan designed specifically for HQ2. *We look forward to that opportunity.*







a proposal prepared for

**amazon**

by the



**Department of Economic Development**



# INTRODUCTION

letter from acting director rob dixon

executive summary



## → letter from acting director rob dixon

October 19, 2017

Ms. Holly Sullivan  
Amazon  
Office of Economic Development  
c/o Site Manager Golden  
2121 7th Avenue  
Seattle, WA 98121

Dear Ms. Sullivan:

The State of Missouri is pleased to present these uniquely designed incentives to help welcome Amazon's "HQ2" to our state. The incentives are structured to accomplish four main objectives:

- Assist Amazon with capital costs associated with the location;
- Build a lifelong partnership between Amazon and Missouri to transform America's heartland together, starting with public infrastructure, educational opportunities, and strengthening Amazon's new communities within the state;
- Attract, train and retain top workforce talent; and
- Provide creative solutions directed at Amazon's worldwide business plan, including a means to bring offshore funds back home with minimal tax consequence.

These incentives are designed as straightforward, annually derived benefits using simple calculations and no gimmicks. They are designed to bring Amazon the full value of each dollar. A dollar is a dollar in Missouri. Our incentives have no "gotcha" elements.

Our proposal envisions a strong partnership between the State of Missouri and Amazon, by investing in Amazon's success and presenting unique opportunities for the Company and State to collectively invest in the community's success. We are appreciative of your corporate value and your desire to be an active member of the community in which you reside. There is a tremendous amount of value to be derived with Amazon in America's heartland. And, that value extends both directions. The opportunity is truly transformative, and we would welcome the chance to make it happen together.

As you study our beautiful state and this opportunity, we encourage you to think big. Let's learn and be curious together – Missouri is one of the Midwest's top states for innovation. You can always insist on – and count on – the highest standards in Missouri. Like you, we do more with less, and we invest wisely. The wise investment follows in this proposal. Missouri is ready to earn your trust, and you can count on us to deliver results.

Welcome home, Amazon.



Sincerely,



Robert B. Dixon  
Director

In addition to local incentive proposals, the State of Missouri's incentive proposal consists of up to **\$2.429 billion** over a period of 10 years in support of locating Amazon's HQ2 within Missouri. The package is made up of seven (7) distinct programs that support the four (4) objectives outlined.

It is important that Missouri partner with Amazon to alleviate some of the capital costs that will be incurred as a result of HQ2's location in our state. The **Invest Missouri** program accomplishes that by providing up to **\$1.36 billion** in refundable tax credits.

An additional opportunity exists to offset Amazon's capital costs even more with the **Reinvest Missouri** program. Here, Missouri will add up to **\$151.5 million** of additional refundable tax credits if Amazon chooses to locate its HQ2 facilities in a distressed area of the city.

It is equally important that Missouri partner with Amazon to ensure a consistent, qualified workforce to ensure Amazon's success. Missouri offers three (3) programs to indicate our dedication to a high quality talent pool that meets Amazon's standards of excellence. The programs address Missouri's current outstanding talent, new Missouri talent, and future Missouri talent.

- First, the **Missouri Miles4°** (miles for degrees) program creates an opportunity to secure workforce assistance from the state by investing in rural broadband. Under this unique partnership, Missouri will provide up to **\$100 million** in refundable tax credits directed at flexible training assistance for Amazon employees, paired with Amazon's investments in rural broadband infrastructure across the State. The **Missouri Miles4°** program will not only allow Amazon training assistance now, but will also create an investment in skilled Missourians to meet the company's demands in the future.
- Second, the **Missouri Talent** program will provide up to **\$125 million** in the form of individual income tax deductions for new Amazon employees who relocate to the State to join the company. This attraction tool lowers talented employees' state tax liability and ensures a steady stream of qualified employees as Amazon ramps up employment of its Missouri HQ2 development.
- Third, the **Next Generation Missouri** program focuses its efforts on our most important asset – our children. The **Next Generation Missouri** program will provide Amazon up to **\$100 million** in refundable contribution tax credits in return for Amazon's investments in STEM-focused educational programs for Missouri's youth.

In the spirit of collective success, the **Missouri Mutual Partners** program provides Amazon an incentive of up to **\$400 million** for deposit into a fund, operated by a public board consisting of 2 Amazon appointees, 1 gubernatorial appointee, the director of the Department of Economic Development, and a local government appointee. Half of the \$400 million will be available for direct investment in Amazon securities. The other half will be available for local infrastructure projects as determined by the board, including expansion of public transit, development of research, education and related "centers of excellence", and other projects that continue to create mutual opportunities for success. To further enhance Missouri's thriving entrepreneurial ecosystem, both portions of the board's fund could be used to support investments in qualified Missouri startups.

Lastly, to show our desire to impact Amazon's global business operations, the **Missouri Headquarters** program will provide up to **\$200 million** in refundable tax credits to offset the tax costs of bringing offshore funds home and investing them in Missouri.

The program details, including benefit calculations, are provided herein.





# INVEST MISSOURI

program summary sheet

benefit calculation

## program purpose

Invest Missouri is designed to attract new business to the state by helping offset the capital costs associated with a new location.

## eligible applicants

Businesses proposing 50,000 new jobs in Missouri and investing \$5 billion in facility construction, renovation and equipment purchase.

## eligibility criteria

- Established, successful businesses with a dynamic track record that will provide transformative value to the State and which share the same values of thinking big, lifelong learning and curiosity, highest standards, frugality, trustworthiness and getting results.
- Companies must receive and accept a written proposal from the State of Missouri.

## program benefits

The benefits are performance based, derived as a percentage of annual payroll, and paid to the company annually in the form of refundable tax credits. For each new job created in the state, five (5) years of benefits will apply.

New jobs and related payroll created in Year 1 will earn 2.20% of payroll each year for 5 years.

New jobs and related payroll created in Year 2 will earn 2.70% of payroll each year for 5 years.

New jobs and related payroll created in Year 3 will earn 3.20% of payroll each year for 5 years.

New jobs and related payroll created in Year 4 will earn 3.70% of payroll each year for 5 years.

New jobs and related payroll created in Year 5 will earn 4.20% of payroll each year for 5 years.

New jobs and related payroll created in Year 6 will earn 4.70% of payroll each year for 5 years.

New jobs and related payroll created in Year 7 will earn 5.20% of payroll each year for 5 years.

New jobs and related payroll created in Year 8 will earn 5.70% of payroll each year for 5 years.

New jobs and related payroll created in Year 9 will earn 6.20% of payroll each year for 5 years.

## program limits

The program agreements provide a maximum period in which the jobs may be created. The new jobs assume an annual baseline to ensure job growth. No penalty incurs for attrition, as benefits will reflect any job loss. The maximum cumulative cap under the program is \$1.36B.

## credit attributes (type, value)

The benefit is derived in the form of a refundable, sellable and transferable tax credit which may be applied to State income tax.

## approval procedure

Benefits are considered authorized at the time of the announcement of the company's location in Missouri. Benefits may start accruing at the execution of the program agreement.

## reporting

Annual job creation reports and payroll are provided by the Company to the Department of Economic Development for benefit calculation.

## status regarding legislation

The Missouri General Assembly is expected to consider and approve this benefit via special legislation in January 2018. Such legislation could contain an emergency clause that would authorize the benefit immediately upon the eligible company meeting the program's eligibility criteria.



## benefit calculation:

## assumptions

Statewide Average Wage		Average Annual Starting Wage Benefit Year 1 (as listed on chart) is Total NOIs to submit Total new Jobs Total Capital Investment											\$100,000 State FY 2020 9 50,000 \$5,000,000,000		
		YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10	YEAR 11	YEAR 12	YEAR 13	TOTAL
AVERAGE WAGE - ALL NOIS		\$100,000	\$103,000	\$106,000	\$109,273	\$112,551	\$115,827	\$119,105	\$122,387	\$126,677	\$130,477	\$134,302	\$138,423	\$142,576	
NEW JOBS - NOI#1		2,500	2,500	2,500	2,500	2,500									
NEW PR - NOI#1		\$250,000,000	\$257,500,000	\$265,225,000	\$273,181,750	\$281,377,203									
TAX CREDIT - NOI#1	2.20%	\$5,500,000	\$5,665,000	\$5,834,950	\$6,009,999	\$6,190,298									
TOTAL BENEFITS - NOI#1		\$5,500,000	\$5,665,000	\$5,834,950	\$6,009,999	\$6,190,298									\$29,200,247
NEW JOBS - NOI#2			5,738	5,738	5,738	5,738	5,738								
NEW PR - NOI#2			\$59,104,000	\$608,744,420	\$627,006,753	\$645,816,955	\$665,191,464								
TAX CREDIT - NOI#2	2.70%		\$15,957,278	\$16,436,099	\$16,929,182	\$17,437,058	\$17,980,170								
TOTAL BENEFITS - NOI#2			\$15,957,278	\$16,436,099	\$16,929,182	\$17,437,058	\$17,980,170								\$54,719,887
NEW JOBS - NOI#3				5,738	5,738	5,738	5,738	5,738							
NEW PR - NOI#3				\$608,744,420	\$627,006,753	\$645,816,955	\$665,191,464	\$685,147,208							
TAX CREDIT - NOI#3	3.20%			\$19,479,821	\$20,064,216	\$20,668,143	\$21,286,127	\$21,924,711							\$103,421,018
TOTAL BENEFITS - NOI#3				\$19,479,821	\$20,064,216	\$20,668,143	\$21,286,127	\$21,924,711							
NEW JOBS - NOI#4					5,738	5,738	5,738	5,738	5,738						
NEW PR - NOI#4					\$627,006,753	\$645,816,955	\$665,191,464	\$685,147,208	\$705,701,624						
TAX CREDIT - NOI#4	3.70%				\$23,199,250	\$23,895,227	\$24,612,084	\$25,350,447	\$26,110,960						
TOTAL BENEFITS - NOI#4					\$23,199,250	\$23,895,227	\$24,612,084	\$25,350,447	\$26,110,960						\$123,167,968
NEW JOBS - NOI#5						5,738	5,738	5,738	5,738	5,738					
NEW PR - NOI#5						\$645,816,955	\$665,191,464	\$685,147,208	\$705,701,624	\$726,872,673					
TAX CREDIT - NOI#5	4.20%					\$27,124,312	\$27,938,041	\$28,776,183	\$29,639,468	\$30,528,652					
TOTAL BENEFITS - NOI#5						\$27,124,312	\$27,938,041	\$28,776,183	\$29,639,468	\$30,528,652					\$144,006,657
NEW JOBS - NOI#6							5,738	5,738	5,738	5,738					
NEW PR - NOI#6							\$665,191,464	\$685,147,208	\$705,701,624	\$726,872,673	\$748,678,853				
TAX CREDIT - NOI#6	4.70%						\$31,263,999	\$32,201,919	\$33,167,976	\$34,163,016	\$35,187,906				
TOTAL BENEFITS - NOI#6							\$31,263,999	\$32,201,919	\$33,167,976	\$34,163,016	\$35,187,906				\$165,984,816
NEW JOBS - NOI#7								5,738	5,738	5,738		5,738			
NEW PR - NOI#7								\$685,147,208	\$705,701,624	\$726,872,673	\$748,678,853	\$771,139,218			
TAX CREDIT - NOI#7	5.20%							\$35,627,655	\$36,696,484	\$37,797,279	\$38,931,300	\$40,099,239			
TOTAL BENEFITS - NOI#7								\$35,627,655	\$36,696,484	\$37,797,279	\$38,931,300	\$40,099,239			
NEW JOBS - NOI#8									5,738	5,738			5,738		
NEW PR - NOI#8									\$705,701,624	\$726,872,673	\$748,678,853	\$771,139,218	\$794,273,965		
TAX CREDIT - NOI#8	5.70%								\$40,224,993	\$41,431,742	\$42,674,695	\$43,954,935	\$45,273,584		
TOTAL BENEFITS - NOI#8									\$40,224,993	\$41,431,742	\$42,674,695	\$43,954,935	\$45,273,584		\$213,550,948
NEW JOBS - NOI#9											7334	7334	7334		
NEW PR - NOI#9											\$59,329,080	\$61,108,953	\$62,942,221	\$64,830,488	
TAX CREDIT - NOI#9	6.20%										\$57,601,049	\$59,329,080	\$61,108,953	\$62,942,221	
TOTAL BENEFITS - NOI#9											\$57,601,049	\$59,329,080	\$61,108,953	\$62,942,221	\$305,811,792
TOTAL PROJECT - TAX CREDIT		\$5,500,000	\$21,622,278	\$41,750,871	\$65,202,647	\$85,313,038	\$123,060,421	\$143,880,914	\$165,839,882	\$201,521,838	\$176,122,962	\$145,163,128	\$108,215,595	\$64,830,488	\$1,359,024,360



# REINVEST MISSOURI

program summary sheet

benefit calculation



## program purpose

Reinvest Missouri is designed to incentivize new businesses in the State to develop or renovate facilities in specific distressed areas of the community. The program is an additional incentive applied to companies awarded Invest Missouri funds.

## eligible applicants

Businesses proposing 50,000 new jobs in Missouri and investing \$5 billion in facility construction, renovation and equipment purchase.

## eligibility criteria

- Established, successful businesses with a dynamic track record that will provide transformative value to the State and which share the same values of thinking big, lifelong learning and curiosity, highest standards, frugality, trustworthiness and getting results.
- Companies must receive and accept a written proposal from the State of Missouri.

## program benefits

The benefits are performance based, derived as a percentage of annual payroll, and paid to the company annually in the form of refundable tax credits. For each new job created in the State at a facility which is located inside a defined distressed area, the company may receive an additional 0.5% of payroll for each year for five (5) years.

Total payroll for new employees located at facilities in distressed areas x 0.5% x 5 years.

## program limits

The program agreements provide a maximum period in which the jobs may be created. The new jobs assume an annual baseline to ensure job growth. No penalty incurs for attrition, as benefits will reflect any job loss. The maximum cumulative cap under the program is \$151.5M.

## credit attributes (type, value)

The benefit is derived in the form of a refundable, sellable and transferable tax credit which may be applied to State income tax.

## approval procedure

Benefits are considered authorized at the time of the announcement of the company's location in Missouri. Benefits may start accruing at the execution of the program agreement and confirmation of the location of the facilities inside the defined distressed areas.

## reporting

Annual job creation reports, annual payroll, and facility location are provided by the Company to the Department of Economic Development for benefit calculation.

## status regarding legislation

The Missouri General Assembly is expected to consider and approve this benefit via special legislation in January 2018. Such legislation could contain an emergency clause that would authorize the benefit immediately upon the eligible company meeting the program's eligibility criteria.

benefit calculation:

assumptions

reinvest missouri

Statewide Average Wage		Average Annual Starting Wage Benefit Year 1 (as listed on chart) is										\$100,000	
		Total NOIs to submit										State FY 2020	
		Total new Jobs										9	
		Total Capital Investment										\$5,000,000,000	





# MISSOURI MILES4°

program summary sheet  
benefit calculation

## program purpose

Missouri Miles4° is designed to provide flexible workforce training benefits to eligible companies and connect Missourians in rural parts of the State to educational resources and training opportunities through enhanced broadband infrastructure.

## eligible applicants

Businesses proposing 50,000 new jobs in Missouri and investing \$5 billion in facility construction, renovation and equipment purchase.

## eligibility criteria

- Established, successful businesses with a dynamic track record that will provide transformative value to the State and which share the same values of thinking big, lifelong learning and curiosity, highest standards, frugality, trustworthiness and getting results.
- Companies must receive and accept a written proposal from the State of Missouri.
- Companies shall be eligible to receive refundable tax credits equal to 40% of their contributions (monetary or property) to qualified rural broadband projects.

## program benefits

Refundable tax credits to be used for the company's workforce training programs.

## program limits

The maximum cumulative cap under the program is \$100 million of refundable tax credits.

## credit attributes (type, value)

The benefit is derived in the form of a refundable, sellable and transferable tax credit which may be applied to the eligible company's State income tax. The credits must be used for the company's workforce training programs.

## approval procedure

Eligible companies must propose potential rural broadband contribution recipients to the Department of Economic Development and the Department of Agriculture. Following the Departments' approval of the rural broadband project, the eligible company shall submit evidence of its contribution (including its value) to the Department of Economic Development.

## reporting

Contribution recipients must provide documentation to the Department of Economic Development evidencing how contributed funds were used.

## status regarding legislation

The Missouri General Assembly is expected to consider and approve this benefit via special legislation in January 2018. Such legislation would contain an emergency clause that would authorize the benefit immediately upon the eligible company meeting the program's eligibility criteria.



	2020	2021	2022	2023	2024	2025	2026	2027	2028	TOTAL
AMOUNT OF INVESTMENT IN RURAL BROADBAND	\$12,500,000	\$28,690,000	\$28,690,000	\$28,690,000	\$28,690,000	\$28,690,000	\$28,690,000	\$28,690,000	\$36,670,000	\$250,000,000
BENEFIT AMOUNT	\$5,000,000	\$11,476,000	\$11,476,000	\$11,476,000	\$11,476,000	\$11,476,000	\$11,476,000	\$11,476,000	\$14,668,000	\$100,000,000

Benefit amount equal to 40% of amount of contributions to rural broadband.



# MISSOURI TALENT

program summary sheet

benefit calculation



## program purpose

Missouri Talent is designed to attract out-of-state workforce talent to relocate to Missouri by offering an individual tax deduction to eligible new employees of eligible companies.

## eligible applicants

Businesses proposing 50,000 new jobs in Missouri and investing \$5 billion in facility construction, renovation and equipment purchase.

## eligibility criteria

- Established, successful businesses with a dynamic track record that will provide transformative value to the State and which share the same values of thinking big, lifelong learning and curiosity, highest standards, frugality, trustworthiness and getting results.
- Companies must receive and accept a written proposal from the State of Missouri.
- Eligible new employees must (A) relocate to Missouri from another state, (B) establish domicile in Missouri for at least three (3) consecutive years, and (C) remain employed at the eligible company for at least three (3) consecutive years.

## program benefits

Each eligible new employee shall receive a tax deduction of up to \$5,000. The eligible company may allocate the deduction amount among its eligible new employees as it sees fit, provided that no employee may receive more than one deduction.

## program limits

The benefit is available to a maximum of 25,000 new employees, with a total cumulative benefit cap of \$125M, subject to an annual limit of \$13.9M.

## attributes (type, value)

- The benefit is derived in the form of an individual, non-refundable, non-sellable and non-transferable tax deduction, which may be applied to an eligible new employee's State income tax.
- Eligible new employees must use the deduction within 2 years of receiving it.

## approval procedure

Benefits are considered authorized at the time of the announcement of the company's location in Missouri. Eligible employees can claim the deduction on their individual tax returns.

## reporting

The eligible company shall send a certified list of eligible new employees to the Missouri Department of Revenue annually for the duration of the benefit period.

## status regarding legislation

The Missouri General Assembly is expected to consider and approve this benefit via special legislation in January 2018. Such legislation could contain an emergency clause that would authorize the benefit immediately upon the eligible company meeting the program's eligibility criteria.

	2020	2021	2022	2023	2024	2025	2026	2027	2028	TOTAL
<b>JOBS</b>	2,500	5,738	5,738	5,738	5,738	5,738	5,738	5,738	7,334	50,000
<b>AMOUNT UP TO \$5,000/JOB</b>	\$13,888,888	\$13,888,888	\$13,888,888	\$13,888,888	\$13,888,888	\$13,888,888	\$13,888,888	\$13,888,888	\$13,888,888	\$125,000,000

As an incentive to recruit out-of-state talent, the State of Missouri will allow a tax deduction of up to \$5,000/job for the eligible new jobs up to a maximum of \$13,888,888 each year. The tax deduction must be used by those employees selected by the Company within 2 years of the date of hire.



# NEXT GENERATION MISSOURI

program summary sheet





# next generation missouri

## program purpose

Next Generation Missouri is designed to encourage investment in Missouri's future workforce through STEM-focused educational programs for Missouri's youth.

## eligible applicants

Businesses proposing 50,000 new jobs in Missouri and investing \$5 billion in facility construction, renovation and equipment purchase.

## eligibility criteria

- Established, successful businesses with a dynamic track record that will provide transformative value to the State and which share the same values of thinking big, lifelong learning and curiosity, highest standards, frugality, trustworthiness and getting results.
- Companies must receive and accept a written proposal from the State of Missouri.
- Companies shall be eligible to receive refundable tax credits equal to 30% of their contributions (monetary or property) to qualified STEM projects.

## program benefits

Refundable tax credits.

## program limits

The maximum cumulative cap under the program is \$100 million of refundable tax credits.

## credit attributes (type, value)

The benefit is derived in the form of a refundable, sellable and transferable tax credit which may be applied to the eligible company's State income tax.

## approval procedure

Eligible companies must propose potential STEM projects in partnership with an approved education partner (e.g. local schools, non-profit organizations focused on educational programs) to the Department of Economic Development. Following the Department's approval of the STEM project, the eligible company shall submit evidence of its contribution (including its value) to the Department of Economic Development.

## reporting

Contribution recipients must provide documentation to the Department of Economic Development evidencing how contributed funds were used.

## status regarding legislation

The Missouri General Assembly is expected to consider and approve this benefit via special legislation in January 2018. Such legislation could contain an emergency clause that would authorize the benefit immediately upon the eligible company meeting the program's eligibility criteria.



# MISSOURI MUTUAL PARTNERS

program summary sheet

benefit calculation

## program purpose

Missouri Mutual Partners is a body corporate that may administer up to \$400 million in funding over 10 years to invest in critical infrastructure, education, and other public needs that may indirectly benefit a qualified applicant company. In addition, up to 50% of the funds may be held in marketable securities of the applicant company. The fund may also invest any amount in qualified startup companies associated with the Missouri Technology Corporation.

## eligible applicants

Businesses proposing 50,000 new jobs in Missouri and investing \$5 billion in facility construction, renovation and equipment purchase.

## eligibility criteria

- Established, successful businesses with a dynamic track record that will provide transformative value to the State and which share the same values of thinking big, lifelong learning and curiosity, highest standards, frugality, trustworthiness and getting results.
- Companies must receive and accept a written proposal from the State of Missouri.

## program benefits

The program allows for the creation and incorporation of a body corporate that is headed by two members of the qualified company and three governmental members (one local appointee, one gubernatorial appointee, and the Director of Economic Development) (the "MMP board"). Annual tax credits in the amount of 1.3% of the total employee payroll in the state are distributed to the MMP board. These credits may be sold or transferred for valuable consideration. Up to 50% of the MMP board's total funds may be held (in the name of the board in the form of marketable securities of the applicant. However, any purchase or sale of securities must be authorized by the company's members of the board.

The MMP board may authorize the infrastructure, educational, and other qualified projects payable from the fund. In addition, the MMP board may accept local and private contributions to use for the same purposes.

## program limits

The maximum cumulative funding cap under the program is \$400 million of refundable tax credits. There is no limit to the overall size of the fund itself.

## credit attributes (type, value)

The benefit is derived in the form of a refundable, sellable and transferable tax credit which may be applied to the State income tax.

## approval procedure

Benefits are considered authorized upon the eligible company's announcement and creation of new jobs within Missouri.

## reporting

The MMP board must provide an annual report to the Governor and the General Assembly showing its current holdings and how its funds were used.

## status regarding legislation

The Missouri General Assembly is expected to consider and approve this benefit via special legislation in January 2018. Such legislation could contain an emergency clause that would authorize the benefit immediately upon the eligible company meeting the program's eligibility criteria.



benefit calculation:		assumptions													\$100,000	
Statewide Average Wage		\$46,564													State FY 2020	
Average Annual Starting Wage		Benefit Year 1 (as listed on chart) is													9	
Total NOIs to submit		Total new Jobs													50,000	
Total Capital Investment															\$5,000,000,000	
% BENEFIT	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10	YEAR 11	YEAR 12	YEAR 13	TOTAL		
AVERAGE WAGE - ALL NOIS	\$100,000	\$103,000	\$106,090	\$109,273	\$112,051	\$115,027	\$119,405	\$122,987	\$126,677	\$130,477	\$134,392	\$138,423	\$142,576			
NEW JOBS - NOI#1	2,500	2,500	2,500	2,500	2,500											
NEW PR - NOI#1	\$250,000,000	\$257,500,000	\$265,225,000	\$273,181,750	\$281,377,203											
TAX CREDIT - NOI#1	1.30%	\$3,250,000	\$3,347,500	\$3,447,925	\$3,551,363	\$3,657,904										
TOTAL BENEFITS - NOI#1		\$3,250,000	\$3,447,500	\$3,447,925	\$3,551,363	\$3,657,904								\$17,254,691		
NEW JOBS - NOI#2		5,738	5,738	5,738	5,738	5,738										
NEW PR - NOI#2		\$591,014,000	\$608,744,420	\$627,006,753	\$645,816,955	\$665,191,464										
TAX CREDIT - NOI#2	1.30%	\$7,683,182	\$7,913,677	\$8,151,088	\$8,395,620	\$8,647,489										
TOTAL BENEFITS - NOI#2		\$7,683,182	\$7,913,677	\$8,151,088	\$8,395,620	\$8,647,489								\$40,791,057		
NEW JOBS - NOI#3			5,738	5,738	5,738	5,738	5,738									
NEW PR - NOI#3			\$608,744,420	\$627,006,753	\$645,816,955	\$665,191,464	\$685,147,208									
TAX CREDIT - NOI#3	1.30%		\$7,913,677	\$8,151,088	\$8,395,620	\$8,647,489	\$8,906,914									
TOTAL BENEFITS - NOI#3			\$7,913,677	\$8,151,088	\$8,395,620	\$8,647,489	\$8,906,914							\$42,014,788		
NEW JOBS - NOI#4				5,738	5,738	5,738	5,738	5,738								
NEW PR - NOI#4				\$627,006,753	\$645,816,955	\$665,191,464	\$685,147,208	\$705,701,624								
TAX CREDIT - NOI#4	1.30%			\$8,151,088	\$8,395,620	\$8,647,489	\$8,906,914	\$9,174,121								
TOTAL BENEFITS - NOI#4				\$8,151,088	\$8,395,620	\$8,647,489	\$8,906,914	\$9,174,121						\$43,276,232		
NEW JOBS - NOI#5					5,738	5,738	5,738	5,738	5,738							
NEW PR - NOI#5					\$645,816,955	\$665,191,464	\$685,147,208	\$705,701,624	\$726,872,673							
TAX CREDIT - NOI#5	1.30%				\$8,395,620	\$8,647,489	\$8,906,914	\$9,174,121	\$9,449,345							
TOTAL BENEFITS - NOI#5					\$8,395,620	\$8,647,489	\$8,906,914	\$9,174,121	\$9,449,345					\$44,273,489		
NEW JOBS - NOI#6						5,738	5,738	5,738	5,738	5,738						
NEW PR - NOI#6						\$665,191,464	\$685,147,208	\$705,701,624	\$726,872,673	\$748,678,853						
TAX CREDIT - NOI#6	1.30%					\$8,647,489	\$8,906,914	\$9,174,121	\$9,449,345	\$9,732,025						
TOTAL BENEFITS - NOI#6						\$8,647,489	\$8,906,914	\$9,174,121	\$9,449,345	\$9,732,025				\$45,910,694		
NEW JOBS - NOI#7							5,738	5,738	5,738	5,738	5,738					
NEW PR - NOI#7							\$685,147,208	\$705,701,624	\$726,872,673	\$748,678,853	\$771,139,218					
TAX CREDIT - NOI#7	1.30%						\$8,906,914	\$9,174,121	\$9,449,345	\$9,732,025	\$10,024,810					
TOTAL BENEFITS - NOI#7							\$8,906,914	\$9,174,121	\$9,449,345	\$9,732,025	\$10,024,810			\$47,288,014		
NEW JOBS - NOI#8								5,738	5,738	5,738	5,738	5,738				
NEW PR - NOI#8							\$705,701,624	\$726,872,673	\$748,678,853	\$771,139,218	\$794,273,395					
TAX CREDIT - NOI#8	1.30%						\$9,174,121	\$9,449,345	\$9,732,025	\$10,024,810	\$10,325,554					
TOTAL BENEFITS - NOI#8							\$9,174,121	\$9,449,345	\$9,732,025	\$10,024,810	\$10,325,554			\$48,706,655		
NEW JOBS - NOI#9									5,738	5,738	5,738	5,738	7334			
NEW PR - NOI#9									\$929,049,178	\$956,920,653	\$985,628,273	\$1,015,197,121	\$1,045,653,034			
TAX CREDIT - NOI#9	1.30%								\$12,077,639	\$12,439,968	\$12,813,168	\$13,197,563	\$13,593,489			
TOTAL BENEFITS - NOI#9									\$12,077,639	\$12,439,968	\$12,813,168	\$13,197,563	\$13,593,489	\$94,121,827		
TOTAL PROJECT TAX CREDIT		\$3,250,000	\$11,030,692	\$19,275,280	\$28,004,626	\$37,240,385	\$44,534,669	\$45,870,606	\$49,575,018	\$41,639,444	\$32,662,787	\$23,523,117	\$15,593,489	\$393,938,448		



# MISSOURI HEADQUARTERS

program summary sheet

benefit calculation

## program purpose

The Missouri Headquarters program is designed to offset up to \$200 million in incidental costs and tax consequences associated with the repatriation of offshore capital to be utilized in the construction of a qualified applicant's headquarters or expenditures for personal and real property.

## eligible applicants

Businesses proposing 50,000 new jobs in Missouri and investing \$5 billion in facility construction, renovation and equipment purchase.

## eligibility criteria

- Established, successful businesses with a dynamic track record that will provide transformative value to the State and which share the same values of thinking big, lifelong learning and curiosity, highest standards, frugality, trustworthiness and getting results.
- Companies must receive and accept a written proposal from the State of Missouri.

## program benefits

The program allows for a rebate in the form of refundable tax credits for capital that is repatriated to Missouri for the purposes of establishing or expanding the headquarters of a qualified applicant. Other incidental costs attributable to the access of capital for use in headquarters construction may qualify under the program, including debt service for loans that are collateralized by foreign capital.

The amount of tax credits is equal to cost incurred or tax paid attributable to the repatriated capital investment.

## program limits

The maximum cumulative cap under the program is \$200 million of refundable tax credits, with an annual limit of \$50 million. Eligible costs from one year may be carried forward and claimed within 4 years.

## credit attributes (type, value)

The benefit is derived in the form of a refundable, sellable and transferable tax credit which may be applied to the eligible company's State income tax.

## approval procedure

Benefits are considered authorized at the time of the announcement of the company's location in Missouri.

## reporting

To receive the benefits, the qualified applicant must provide the Department of Revenue with evidence of tax payment associated with the repatriation of foreign capital and demonstrate that the capital is held by a state-chartered institution.

## status regarding legislation

The Missouri General Assembly is expected to consider and approve this benefit via special legislation in January 2018. Such legislation could contain an emergency clause that would authorize the benefit immediately upon the eligible company meeting the program's eligibility criteria.



	AMOUNT OF OVERSEAS FUNDS DEPOSITED AND EXPENDED IN MO	ESTIMATED AMOUNT OF TAX CREDIT TO OFFSET OTHER STATE TAX LIABILITY	MAXIMUM/YEAR BENEFIT
2020	\$1,000,000,000	\$50,000,000	\$50,000,000
2021	\$1,000,000,000	\$50,000,000	\$50,000,000
2022	\$1,000,000,000	\$50,000,000	\$50,000,000
2023	\$1,000,000,000	\$50,000,000	\$50,000,000
		TOTAL	\$200,000,000

## Real Property Tax Reduction

## Personal Property Tax Reduction

## Local Sales Tax Reduction on Personal Property and Construction Materials

### Calculation of the Incentive Amount

St. Louis City: \$478 million    St. Louis County: \$40.23 million

### Program Benefits

At least a 50% reduction in real property taxes for the first 15 years for each building or location brought on line and occupied.

At least a 50% reduction in personal property taxes for the life of the assets purchased for and used in the operation of the Project.

At least a 50% reduction in local sales taxes on personal property and construction materials purchased for the operation of the Project



### Description of Incentives Program Options and Processes

In Missouri there are multiple approaches that can be used to achieve the reduction in real property taxes for buildings and personal property and to achieve a reduction in sales taxes on the purchase of construction materials and personal property. We would recommend utilization of Chapter 100 RSMo to achieve a reduction in construction and operating costs or to utilize a tax increment financing approach should you wish to monetize some of these benefits earlier than on a year-by-year basis.

**1. Tax Abatement** - Real property tax reduction can be achieved with traditional real property tax abatement under Chapter 99 RSMo, which is designed to incentivize the “relief of blight”. The Saint Louis Development Corporation (SLDC) and the St. Louis Economic Development Partnership will prepare the necessary Redevelopment Plans, Redevelopment Agreements, approving resolutions and ordinances and publish the necessary notices in order to achieve the proposed abatement. The approving bodies involved in the City are SLDC’s subordinate agency, the Land Clearance for Redevelopment Authority of the City of St. Louis (LCRA), and the City of St. Louis through its Board of Aldermen and Mayor, and the St. Louis County Council for St. Louis County approvals.

**2. Chapter 100 RSMo** - An alternate method for real property tax abatement is to utilize Chapter 100 RSMo. The benefit of using this approach is that it can also be a method to achieve personal property tax abatement and a reduction in sales taxes for construction materials and personal property. Under Chapter 100, the ownership of the real property and/or personal property is transferred to a governmental entity (City or other entity as appropriate) which result in the assets being exempted from taxation and then leased back to the Company. That tax exempt status extends to:

- a. annual real property tax; and
- b. annual personal property tax.

**That tax exempt status also extends to:**

- a. state and local sales tax on the purchase of construction materials; and
- b. with the approval of the State, the state and local sales tax on the acquisition of personal property.



## Tax Exempt Status

The City and/or County uses its own tax exempt status to provide a lower cost benefit for the capital investment in certain materials and equipment and a lower cost of real and personal property for an established period of time. The level of "reduction" or "abatement" is negotiated, and it is proposed that the Company will agree to pay either a percentage of the real and personal property taxes that would otherwise be due, or agree pay based on a schedule of fixed payments for an established period of time.

It is also proposed that the Company agrees to pay an agreed upon percentage of the sales tax that otherwise would be due.

Eligible companies include: manufacturing, warehousing, distribution, office, research and development, agricultural processing and services in interstate commerce. Services in interstate commerce are defined with a very narrow definition. Retail and services in intrastate commerce are not eligible.

SLDC and or the Economic Development Partnership will cause the preparation of the necessary approving resolutions and ordinances and publish the necessary notices in order to achieve the Chapter 100 on a cost-effective basis.

The approving body involved is City of St. Louis through its Board of Aldermen and Mayor for City-related development, and the St. Louis County Council and County Executive for County-related development.



**3. Tax Increment Financing** – Another method to achieve abatement of real property taxes and to monetize those benefits soon after completion of construction is to utilize tax increment financing (TIF). TIF permits the use of a portion of local real property taxes to assist funding the redevelopment of certain designated areas which are blighted. TIF may be used to pay (or reimburse) certain costs incurred with a redevelopment project. Such costs may include, but are not limited to:

- Professional services such as studies, surveys, plans, financial management, legal counsel,
- Land acquisition and demolition of structures,
- Rehabilitating, repairing existing buildings on site,
- Building necessary new infrastructure in the project area such as streets, sewers, parking, lighting,
- Relocation of resident and business occupants located in the project area, and other expenses.



## Tax Increment Financing

The idea behind TIF is the assumption that the real property will increase in the designated area after redevelopment, and a portion of the increase of these taxes collected in the future for a period of time may be allocated by the City or County to help pay the certain project costs, partially listed above.

SLDC and/or the Economic Development Partnership will cause the preparation of the necessary approving resolutions and ordinances and publish the necessary notices in order to achieve the TIF on a cost-effective basis.

The approving bodies involved are the TIF Commission and the City of St. Louis through its Board of Aldermen and Mayor for City-related development and St. Louis County Council and County Executive for County-related development.

**4. Multiple Tools** – in order to best achieve the Company's goals, it may be necessary to layer the above-listed tools, which would allow the Company to monetize the partial real property abatement through TIF and achieve the other benefits through Chapter 100.

## Timing of Incentive Payment/Realization

Real property tax reduction/abatement can be realized on a year-by-year basis, however, if a tax increment financing (TIF) approach is utilized, the benefits may be monetized soon after completion of construction or renovation

Personal property tax reduction/abatement is realized on a year-by-year basis

Sales tax reduction is achieved at the time of purchase

## Approval Procedure and Schedule

See above and Section 3 of this proposal for additional detail.

## Eligibility Criteria

Core values are fundamental to the identity of the City of St. Louis and St. Louis County. As a result of our values, the local governments support inclusion programs and promoting opportunities for employment of its citizens.

The City's incentive programs support these core values by requiring that all developers and businesses and their contractors and subcontractors comply with the Mayor's Executive Order and City Ordinances regarding utilization of minority- and women-owned businesses.

In addition, such entities must support the City's Living Wage Ordinance, list open jobs through the St. Louis Agency on Employment, and utilize St. Louis residents to promote the overall goals of the City.

St. Louis County includes similar contractor and workforce participation goals in its development agreements as well.

## Status Regarding Legislation

Only standard legislation is required.

## Value of Incentives and Specified Benefit Time Period

Real property tax reduction/abatement can be realized on a year-by-year basis for its fifteen year duration. However, if a tax increment financing (TIF) approach is utilized, the benefits may be monetized soon after completion of construction or renovation and occupancy and recovered as a Net Present Value of the benefit, adjusted by costs of monetization and reduced by a coverage ratio depending on type of incentive and risk of Amazon's performance.

Personal property tax reduction/abatement is realized on a year-by-year basis over the life of the asset.

Sales tax reduction is achieved at the time of purchase.

## Reduction of Local Building Permit Fees

### Calculation of Incentive Amount

**\$9.7 million**

### Program Benefits

At least a **50% reduction** in local building permit fees

### Description

Building Permit Fees are based upon the Total Construction Cost of a project. For purposes of determining a fee, Total Construction Costs shall include all costs for normal site preparation including grading, excavation, and backfill, structural work, interior and exterior finishes, plumbing work, mechanical work, electrical work, engineering and architectural fees.

#### Current Building Permit Fees are as follows:

Building Permit Fee is \$6.00 per \$1,000 of Construction Cost.

Lead Remediation Fund Fee (LRF) is \$2.00 per \$1,000.00 of Construction Cost.

Special Demolition Fund Fee (SDF) is also \$2.00 per \$1,000.00 of Construction Cost.

### For a \$100,000,000.00 Project, the fees would be as follows:

Building Permit Fee	\$ 600,000.00
LRF Fee	\$ 200,000.00
SDF Fee	\$ 200,000.00
<b>Total Fee</b>	<b>\$1,000,000.00</b>

### Timing of Incentive Payments/Realization

Building Permit Fee reduction is achieved at the time of the issuance of the various building permits

### Approval Procedure and Schedule

See Section 3 of this proposal for additional detail. It is contemplated that this incentive will be agreed to and approved within the development agreements establishing the use of various tax abatements and sales tax exemptions as described above.

### Eligibility Criteria

The requirements listed for real and personal property tax abatement and sales tax exemptions apply to all incentives offered by the City of St. Louis.

### Status Regarding Legislation

Only standard legislation is required.



**Reduction of Corporate Earnings Tax**

**Reduction of Employee Earnings Tax**

**Reduction of Employer Payroll Tax**

## **Calculation of Incentive Amount**

More than \$570 million

### **Program Benefits**

At least a 50% reduction in city corporate earnings and employer payroll taxes for the first 15 years of operations, and a gradual return to the full rate over a stated time frame.

\*Please note the value of the corporate earnings tax reduction is not included in the \$570 million figured quoted above nor is it included in the overall value of the incentives packages as additional detail is needed from Amazon to provide an estimated value of the offer.

A rebate to Amazon of at least 50% of the 1% city earnings tax paid by Amazon employees for the first 15 years of operations, and a gradual reduction in the rebate over a stated timeframe; the rebate shall be 75% for employees that meet stated "low-to-moderate" income, or other specified thresholds or requirements.

### **Timing of Incentive Payments/Realization**

The reductions and rebates are received on a year-by-year basis as the employment occurs.

### **Approval Procedure and Schedule**

See Section 3 of this proposal for additional detail. Approval of this incentive will be by a separate ordinance drafted and considered as a package with the documents approving the various tax abatements and sales tax exemptions as described above.

### **Eligibility Criteria**

The requirements listed for real and personal property tax abatement and sales tax exemptions apply to all incentives offered by the City of St. Louis.

### **Status Regarding Legislation**

Only standard legislation is required.

## **First Building Acquisition**

### **Calculation of Incentive Amount**

Greater than \$111 million

### **Program Benefit**

909 Chestnut—"Amazon Tower"—is a 1.4 million square foot, 43-story Class A office tower in the Central Business District and can be made available immediately at a modest cost—\$20 million.

The immediate availability of a property of this size and quality permits Amazon substantial flexibility to meet its immediate and near-term needs for HQ2. The building may be used permanently as office space, used as swing space while main campus construction is underway, and/or can be converted easily to other uses at Amazon's election.

Renovation costs for the tower are anticipated to be approximately \$139 per square foot based on existing market rates. In comparison, new construction cost estimates for the St. Louis region are approximately \$250 per square.

### **Timing of realization**

Standard commercial real estate closing period of 90 to 120 days, sooner at Amazon's election.

### **Approval Procedure and Schedule**

Real estate closing.

### **Eligibility Criteria**

Unique incentive available to this proposal.

### **Status Regarding Legislation**

No legislative action is required.

## **Parking for Amazon Tower**

### **Calculation of Incentive Amount**

**\$54 million**

### **Program Benefits and Timing**

St. Louis City will provide at least 1,250 parking spaces within two blocks of the Amazon Tower within 24 months of being selected for HQ2 and provide interim parking at mass transit locations for any requirement needed to be met prior to 24 months.

### **Timing of Realization**

Up to 24 months; interim parking at mass transit sites as needed.

### **Approval Procedure and Schedule**

See Section 3 of this proposal for additional detail. Approval of this incentive will be by a separate ordinance drafted and considered with the package of documents approving the various tax abatements and sales tax exemptions as described above.

### **Eligibility Criteria**

The requirements listed for real and personal property tax abatement and sales tax exemptions apply to all incentives offered by the City of St. Louis.

### **Status Regarding Legislation**

Only standard legislation is required.



## Land Bank Parcels

### Calculation of Incentive Amount

#### \$15 million

With an average parcel size of 30' x 125' at \$1/square foot, the value of this incentive is \$15M.

This is not a direct benefit to the cost of construction or operating by Amazon, but will help ensure that the region moves quickly to expand capacity for housing as Amazon increases its employment in the region.

### Program Benefits

The City and its land bank (Land Reutilization Authority or LRA) commit to make 4,000 parcels of land available on an affordable basis for housing development by developers identified and approved in a public/private partnership to be determined.

### Time to Realization

Within 90 days of Amazon's choice of St. Louis, the LRA will set aside the committed parcels.

### Approval Procedure and Schedule

See Section 3 of this proposal for additional detail. Approval of this incentive will be by a separate ordinance drafted and considered with the package of documents approving the various tax abatements and sales tax exemptions as described above.

### Eligibility Criteria

The requirements listed for real and personal property tax abatement and sales tax exemptions apply to all incentives offered by the City of St. Louis.

### Status Regarding Legislation

While this approach to disposition of parcels owned by the land bank is novel, the LRA has undertaken specially designed programs to deploy groups of parcels for large scale development previously, and the resolutions before LRA and the ordinances to be presented to the Board of Aldermen can be prepared and move through the approval process expeditiously.

## Expansion and Acceleration of Mass Transit System

### Program Benefits

#### St. Louis City:

St. Louis has completed 15% design of a proposed 17-mile North/South MetroLink extension. City commits to complete the first 10-mile segment by 2023 and to use all reasonable means to complete the balance as soon thereafter as possible. Prop 1 funds generating \$11.7M/year have already been approved by City voters. The City also is investigating alternative public transportation systems using autonomous vehicles, and welcomes conversation with Amazon about deployment of these technologies.

#### St. Louis County:

In addition to the Proposition 1 revenues from the City of St. Louis, revenue for potential MetroLink expansion is available from the half-cent Proposition A sales tax approved by St. Louis County voters in April 2010. Potential extensions to North St. Louis County, South St. Louis County, and the Westport area are all contemplated expansions. All expansion options will strengthen connections to our urban core and provide new linkages between employment centers and residents.

## Education and Infrastructure Funds

### Calculation of Incentive Amount

**\$95 million.**

This is not a direct benefit to the cost of construction or operating by Amazon, but will help ensure that the region thoughtfully applies the benefit and impact of the Amazon headquarters to education that will help train the workforce necessary to move Amazon and the region forward, and to move quickly to expand its infrastructure capacity as Amazon increases its employment in the region.

### Program Benefits

**Education Fund** - Of the real property and personal property taxes paid, an amount equal to 20% of amount paid will be captured and applied to pre-K, K-12 and Junior Colleges in focused STEM education and other education as needed to develop the workforce of the future

**Infrastructure Fund** - Of the sales tax paid, an amount equal to 20% of amount paid will be captured and applied into an infrastructure trust fund and applied by a public/private partnership for transportation and economic development improvements in a manner to be determined.

These funds are proposed to improve and extend and return the economic impact Amazon has on St. Louis back to Amazon as well as the community in a dually beneficial and transformative way. This is achieved by capturing a portion of the significant economic activity created by Amazon's relocation to the St. Louis region and then applying that captured value to promote Amazon and/or the things most important for Amazon in our community.

It is anticipated that these two funds will be coordinated with the State of Missouri's Next Generation Missouri Program and the Missouri Mutual Partners Program. These locally created funds could be administered by the same public/private board administering the state programs.

### Approval Procedure and Schedule

See Section 3 of this proposal for additional detail. The timing of the approval for these funds will proceed with the approvals of the other incentives.

### Eligibility Criteria

The requirements listed for real and personal property tax abatement and sales tax exemptions apply to all incentives offered by the City of St. Louis.

### Status Regarding Legislation

While the idea of creating special applications of incremental tax revenues to the creation of education and infrastructure funds is novel, we anticipate that the necessary ordinances to be presented to the Board of Aldermen can be prepared and move through the approval process expeditiously.





## Economic Development for Growing Economy (EDGE) Tax Credit Program

EDGE provides tax credits to qualifying companies that agree to make capital investment and create new full-time jobs in Illinois, while illustrating an out of state option as an alternative. These credits are non-refundable and can be used against corporate income taxes to be paid over a period not to exceed 10 years. While each annual tax credit amount cannot be larger than the company's state income tax liability, the credit can be carried forward for up to five years.

The credit is equal to 50% of the amount of state income taxes withheld from the salaries of employees in the newly created full-time jobs, with an additional 25% of state income taxes withheld from new employees available for projects created in an underserved area. Furthermore, 10% of eligible training costs will be added to the overall tax credit.

**EDGE Tax Credit = (50% of income tax withholding) + (25% of income tax withholding for underserved area) + (10% of qualified training costs)**

**EDGE Estimate: \$314,622,914** (over a 10 year period)

*Note: Does not include 10% of training costs or 25% additional credit for locating in an underserved area; see below for more analysis of assumptions made*

**Note: All models are based on the assumption investment and employees will occur in the State of Illinois. Given the nature of the joint bid, at time of investment, a determination will need to be made as to where the investment is made; and as employees are hired, whether they are based in Illinois or Missouri. These final determinations during the life of the project will determine final eligibility for EDGE tax credits.**

## Assumptions Regarding EDGE Model

**Employment Ramp (assuming 20,000 IL employees over 10 years – as provided by St. Clair County)**

Year	New Employee Number
(Note: to get EDGE credits, new employees must be located in Illinois)	
2020 (1)	3,125
2021 (2)	3,750
2022 (3)	4,000
2023 (4)	6,000
2024 (5)	9,000
2025 (6)	12,000
2026 (7)	14,000
2027 (8)	16,000
2028 (9)	18,000
2029 (10)	20,000



**DCEO Assumptions:**

- 160 sq. ft./employee – based off a total of 50,000 employees in 8,000,000 sq. ft.
- 3% cost of living increase per year, with average \$100,000/year salary
- Training costs: did not estimate training costs given the unique project/breadth of likely jobs and different training needed
  - **Qualifying training costs:** costs incurred to upgrade the technological skills of Full Time Employees in Illinois and includes:
    - Curriculum development; training materials (including scrap product costs); trainee domestic travel expenses; instructor costs (including wages, fringe benefits, tuition and domestic travel expenses); rent, purchase or lease of training equipment; and other usual and customary training costs.
  - **“Training costs” do not include:** costs associated with travel outside the United States (unless the Taxpayer receives prior written approval for such travel by the Department or Director based on a showing of substantial need or other proof that such training is not reasonably available within the United States), wages and fringe benefits of employees during periods of training, or administrative cost related to Full-Time Employees of the Taxpayer.



## High Impact Business (HIB)

High Impact Business supports large-scale economic development activities by providing tax incentives to companies which make at least \$12 million in project capital expenditures and create 500 or more full-time jobs at the project in Illinois. Businesses qualify for an investment tax credit, building material sales tax exemption and utility tax exemptions:

- **The Investment Tax Credit** is a .50% credit of building, machinery and equipment.
- **Sales Tax Exemption:** 6.25% state sales tax exemption
- **Utility Tax Exemption:** 5.1% state utility sales tax and administrative charge exemption
- **Telecommunications Excise Tax Exemption:** 7% state utility sales tax and administrative charge exemption

**HIB Estimates: \$65,639,143** (over 20 year period)

## Assumptions Regarding HIB Models:

*Note: All assumptions are simply for modeling purposes, and will be reevaluated with information provided by company.*

- **20,000 Employees and 3.2 million SF Yr. 1 all in Illinois**
- 160 sq. ft./employee – based off a total of 50,000 employees in 8,000,000 sq. ft.
- Total building costs of \$4,900,000,000 based of \$5,000,000,000 capital investment, with \$100,000,000 for land acquisition
- 40% of capital investment used for building materials
- Projected \$1 per sq. ft. for electric utility costs
- Projected \$.10 per sq. ft. for natural gas
- Projected \$290 per employee for telecommunications cost
- Will apply for status as an Foreign trade zone – needed to qualify for telecommunications excise tax exemption





**OFFICE OF THE MAYOR  
CITY OF ST. LOUIS  
MISSOURI**

**LYDA KREWSON  
MAYOR**

CITY HALL - ROOM 200  
1200 MARKET STREET  
SAINT LOUIS, MISSOURI 63103-2877  
(314) 622-3201  
FAX: (314) 622-4061  
KREWSONL@STLOUIS-MO.GOV

October 12, 2017

Amazon – Office of Economic Development  
2121 7<sup>th</sup> Avenue  
Seattle, Washington 98121

Re: Amazon HQ2

To Whom It May Concern:

The City of St. Louis stands ready to work with Amazon to enact the legislation for the incentives offered for construction of the HQ2 project. Amazon has widespread support among St. Louis City officials. Attached you will find a letter of support from 22 members of the Board of Aldermen (BOA), constituting a supermajority of the BOA, and the President of BOA.

As Mayor of the City of St. Louis, I affirm my wholehearted commitment to champion the necessary legislation to support the state and local incentives for Amazon's second headquarters. The City and its elected stand ready, from "Day One", to deliver on our legislative proposals in order to catalyze Amazon's investment in our community.

As Amazon evaluates our region's submission, know that from Day One the City and the entire region stand ready to provide Amazon swift and creative solutions to any and all challenges.

Respectfully,

Lyda Krewson  
Mayor, City of St. Louis City

**Attachment:** Board of Aldermen Letter of Support





OFFICE OF THE PRESIDENT

BOARD OF ALDERMEN  
CITY OF ST. LOUIS  
MISSOURI

LEWIS E. REED  
PRESIDENT

ROOM 232, CITY HALL  
1200 MARKET STREET  
ST. LOUIS, MISSOURI 63103-2873  
(314) 622-4114

October 6, 2017

Amazon - Office of Economic Development  
2121 7th Avenue  
Seattle, Washington 98121

Re: Amazon HQ2

To Whom It May Concern:

The members of the Board of Aldermen are very pleased to see that St. Louis is submitting a comprehensive regional proposal to be the location of the Amazon HQ2 project. The City of St. Louis has many great attributes and would be honored to serve as a location for Amazon's second headquarters.

Furthermore, we want to reaffirm our strong commitment to provide the necessary incentives that support Amazon's location in our community and both of our future growth. We are proposing that we also dedicate part of that growth to transforming our Pre-K, K-12, Junior College and other higher learning opportunities as well as infrastructure. In addition, some of the incentives will be structured in a manner that support Amazon's workforce needs and also reduces historical barriers to education and opportunity for our most vulnerable residents.

Please accept this letter as evidence of that strong commitment to support those incentives and a direction to the St. Louis Development Corporation to negotiate and prepare the necessary documentation.

Respectfully,

*[Handwritten signatures of Board of Aldermen members]*



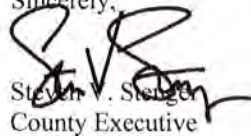


Amazon  
October 13, 2017  
Page Two

These incentives are reflective of the estimated investment and employment at the new Welcome and Training Center. Should Amazon envision a different presence in St. Louis County, we welcome discussing what incentive package may be available commensurate with the opportunity.

From "Day One," the St. Louis region has worked together with Amazon to create a new relationship for a seamless integration into our community. Our region will align with Amazon to provide the most effective and efficient execution of this proposal, and we look forward to working with you. Please do not hesitate to reach out to me directly should you have questions about our proposed incentives or the St. Louis regional proposal.

Sincerely,



Steven V. Stenger  
County Executive



## ST. CLAIR COUNTY BOARD

10 Public Square • Room B561 • Belleville, Illinois 62220-1623

MARK A. KERN  
CHAIRMAN

(618) 277-6600  
Fax (618) 825-2740

October 13, 2017

Amazon  
Office of Economic Development  
C/O Site Manager Golden  
2127 7<sup>th</sup> Avenue  
Seattle, WA 98121

On behalf of St. Clair County, IL I strongly support the St. Louis MSA efforts to attract Amazon HQ2 to our region. We and our State of Illinois and City of East St. Louis partners are proud to be a part of this regional effort. And, we offer a variety of incentives which are briefly outlined below. Details are included in the proposal.

1. City of East St. Louis: River Edge Redevelopment Zone Program includes a significant sales tax exemption on building materials used in any new or renovated buildings. Investment tax credit of 0.5%; job tax credit; and real property tax reduction. Specifics are included in the proposal.
2. City of East St. Louis: Tax Increment Financing (TIF) would defray eligible infrastructure and development costs for up to 23 years.
3. State of Illinois: Significant EDGE tax credits which is a tax credit against payroll taxes paid by your employees; and/or HIB-High Impact Business which is a significant tax credit on a variety of State taxes.
4. St. Clair County: We (and the State) have been undertaking major road improvements in the site area. An, we also offer workforce development programs as do our Missouri partners which include job recruitment, job training and customized training.

Our St. Louis Region is excited to respond to any questions you have.

Sincerely,

MARK A. KERN, Chairman  
St. Clair County Board





**Warner L. Baxter**  
Chairman, President & CEO  
Ameren Corporation  
T 314.554.6302  
F 314.612.2801  
wbaxter@ameren.com

October 11, 2017

Ms. Sheila Sweeney  
Chief Executive Officer  
St. Louis Economic Development Partnership  
7733 Forsyth Boulevard, Suite 2200  
St. Louis, MO 63105

RE: St. Louis Proposal – Amazon HQ2

Dear Ms. Sweeney:

As a Fortune 500 energy provider that powers the quality of life for millions of people in the St. Louis region and surrounding areas in Missouri and Illinois, Ameren is committed to driving economic growth and to making our region a great place to live and do business. That's why Ameren strongly supports the bi-state alliance's efforts to demonstrate that the St. Louis region is the best choice in the United States for the Amazon HQ2 project. Any one of the three proposed sites for Amazon's consideration, including downtown St. Louis, the north riverfront area, and a riverfront location in East St. Louis, Illinois, offer unique and highly visible development attributes in support of Amazon's mission and signature global brand.

Ameren has been a member of this community for over 100 years. We have a long history of working with our economic development partners to attract companies like Amazon to our region. We begin by providing electric service that is among the most reliable and affordable in the country, as well as delivering innovative solutions to meet our customers' energy needs. These factors, coupled with our commitment to work with Amazon and our regional economic development partners to ensure a smooth transition to any site that includes Ameren's energy infrastructure, is a formula for long-term success.

For example, at the North St. Louis riverfront or East St. Louis site locations, Ameren stands ready to work closely with Amazon and our regional partners to relocate and/or redesign our existing energy infrastructure at these sites to ensure that Amazon's state-of-the-art headquarters facility receives safe, reliable and secure energy.

As a Fortune-certified best place to work, a Top 100 military-friendly employer and #1 on the utilities list nationwide for Diversity & Inclusion by DiversityInc, Ameren is proud that our co-workers embrace our mission – To Power the Quality of Life – and demonstrate that this region is a great place to live, work and raise their families. We believe in building thriving communities and stand ready, with our bi-state partners, to work on any site considerations needed to help Amazon experience the tremendous benefits of a St. Louis area headquarters.

Sincerely,

A handwritten signature in black ink that reads "Warner Baxter".

Warner Baxter  
Chairman, President and Chief Executive Officer  
Ameren Corporation





# OTHER INCENTIVES



# OTHER INCENTIVES

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*“In my experience, the city is tremendously helpful in assisting me with my projects. The team is smart, creative, and terrific to work with. What really impresses me is how well the team understands the complexities of urban development. They work very hard to solve problems, and pave the way for mutually beneficial outcomes.”*

– Steve Smith  
President & CEO, The Lawrence Group



# New Incentive Program Approval Timelines

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## State of Missouri

The leadership of the Missouri General Assembly is committed to supporting the introduction of legislation for a benefits package for Amazon when the legislative session convenes January 2018. Such legislation can be pre-filed in December 2017, with an emergency clause that would authorize conferral of the benefits of the package immediately upon passage. The Missouri General Assembly adjourns May 30.

The Missouri Governor may convene the General Assembly in special session for a maximum of 60 calendar days at any time. The President Pro Tem and the Speaker may convene a 30-day special session upon petition of three-fourths of the members of each chamber, and both have included a letter of support at the end of this section.

## St. Louis

Applications for all incentives related to the City of St. Louis are made to the St. Louis Development Corporation (SLDC), which will coordinate and divide the approval process through the applicable City-controlled authorities, boards, and commissions. Most incentives from the City of St. Louis are consistent with past practices and existing programs, and are anticipated to have a high probability of being approved within no more than 90 to 120 days.

To the extent that City of St. Louis ordinances are required, the Board of Aldermen can approve ordinances by a simple majority (15 of 28). Two of the three members of the St. Louis City Board of Estimate and Apportionment (E&A) must also approve before the Board of Aldermen's final vote. The Mayor, City Comptroller, and President of the Board of Aldermen constitute the three-member Board of E&A. Letters evidencing support for the incentives by a supermajority of the Board of Aldermen and a majority of E&A are attached.

Applications for St. Louis County incentives are made through the St. Louis Economic Development Partnership (SLEDP), which will usher the incentive package through required County approvals. The proposed incentives from St. Louis County are consistent with past practices and existing programs, and are anticipated to have a high probability of being approved within a 90-day period.

## State of Illinois

The leadership of the Illinois General Assembly is committed to supporting the introduction of legislation for a benefits package for Amazon when the legislative session convenes in 2018. It adjourns in May or June. In Illinois, a special session can be called by joint proclamation by the presiding officers of both houses. The proposed incentives from the State of Illinois are consistent with past practices and existing programs, and are anticipated to have a high probability of being approved within no more than 90 days.

## St. Clair County

Local approvals required in St. Clair County, Ill., are received by a majority vote from the 29-member board and generally approved within a 90-day time frame. In East St. Louis, such approvals come from the five-member City Council and the Mayor, and are generally approved in less than 90 days.

The City of East St. Louis has agreed to establish a new Tax Increment Finance District (TIF) for the Illinois site on the Illinois riverfront. The new TIF would have an initial existence of 23 years. The new TIF could be created within eight weeks once the required TIF feasibility study is completed within 30 days.

# Clawbacks or Recaptures

In Missouri, incentives proposed so far are scalable and issued based on actual jobs created and maintained, the amount of investment, and ongoing operations. As such, once approved, there are no clawbacks.

In Illinois, the law sets out the minimum recapture language that all development agreements must contain. If aid recipients fail to meet investment, wage, or job creation and retention commitments then the following clawbacks are invoked: High Impact Businesses (HIB) are required to pay back the full amount of their tax exemption; grant recipients must repay a prorated share of grants reflecting the level of deficiency; Large Business Development, Business Development Public

Infrastructure, and Industrial Training Programs recipients that cease operations within five years of receiving aid must repay the entire amount of grants and accelerate loan repayments; EDGE tax credit payments are suspended, and if a company discontinues operations on the site within the first five years of the credit, they must repay all credits claimed during that period to the state.

The Community Investment Recovery Act law requires an annual report tallying the number of companies found in violation, the number that were penalized, and any waivers given. Any company receiving state or local aid to build, improve, or modify real property for projects that attract or retain jobs must refund the value of the assistance if it terminates operations at the site within two years of receiving the subsidy.

# Description and Timeline for Each Incentive

A brief description and timeline for each type of incentive is below. Please note that several incentive programs require an industrial revenue bond transaction. As part of an industrial revenue bond transaction, the City/County (or a City/County-controlled entity) must take title to property during the abatement period (property owned by the City/County or City/County-controlled entity is exempt from taxation) and lease the property back to the company. After the abatement period, the lease is terminated and the property is deeded back to the company. This is a common structure that has been used by several large companies in recent years, including: Pfizer, Boeing, Monsanto, Bunge, RGA, and Express Scripts.

Incentives timelines for programs in St. Louis City are as follows:

## St. Louis City Real Estate Tax Reduction

Application is made to the St. Louis Development Corporation (SLDC) and is considered by the Land Clearance for Redevelopment Authority (LCRA) Board, which makes a recommendation to the Board of Aldermen (Board).

Week 1	Application is submitted to SLDC
Week 3	Considered by the LCRA and recommended to the Board of Aldermen
Week 4	Board Bill introduced; Redeveloper submits designation application to LCRA
Week 7	Public Hearing – Housing, Urban Development, Zoning (HUDZ) Committee of the Board recommends approval – 2nd reading of the Bill
Week 8	Perfection of the Bill – LCRA designates Redeveloper and, if applicable, approves the bond transaction
Week 9	3rd reading of the Bill – final approval of Bill
Week 11	Mayor signs Bill - Ordinance number assigned
Week 15*	Effective date of the Ordinance - LCRA/Redeveloper can sign agreement

\* With emergency clauses and certain other actions, this can occur by Week 15 or earlier.  
\* A similar timeline is in effect for St. Louis County approval as needed.

## St. Louis City Tax Increment Financing

Tax increment financing is available in areas that, pursuant to Section 99.805 RSMo., qualify as a “blighted area” or a “conservation area.” Application is made to the SLDC for consideration by the Tax Increment Financing Commission (TIFC), which makes a recommendation to the Board of Aldermen (Board).

Week 1	Application is submitted to SLDC
Week 2	City/SLDC staff review the application for completeness - Taxing Districts and the TIFC notified
Week 3	TIFC considers application and sets date for Public Hearing
Week 8	Redevelopment plan is prepared
Week 11	TIFC Public Hearing after proper notifications
Week 13	Board Bills introduced at the Board of Aldermen
Week 14	HUDZ Committee of the Board meets and recommends approval of Bills – 2nd reading of Bills at the full Board
Week 15	Perfection of Bills – Board of Equalization & Apportionment approval (if necessary)
Week 16	3rd reading of the Bills – final approval
Week 18	Mayor signs Bills – Ordinance numbers assigned
Week 22*	Effective date of the Ordinances – Incentive Agreement can be Executed

\* With emergency clauses and certain other actions, this can occur by Week 22 or earlier.

\* A similar timeline is in effect for St. Louis County approval as needed.

## St. Louis City/County Sales Tax Exemption On Building Materials

As part of an industrial revenue bond transaction (as described above), the City or the LCRA can provide a project exemption certificate, which will exempt the purchase of building materials from state and local sales and use taxes.

## St. Louis City/County Personal Property Tax Abatement

As part of an industrial bond transaction (as described above), the City, the County, or the LCRA can provide personal property tax abatement.

## St. Louis City Education and Infrastructure Funds

Ordinances approving creation of these two funds will be drafted and considered simultaneously with other incentive legislation and are anticipated to have a high probability, of being approved within a 90-day period.

## State of Illinois HIB Program or River Edge

These incentives are based upon administrative approval only. No additional legislation is required for the state incentives as proposed. If additional incentives are negotiated over and above what is available by existing statutes, state legislative action would be required as described above.

## East St. Louis Real And Personal Property Tax Abatement

Real property tax abatement is provided locally by ordinance under the Tax Increment Financing program. This program is implemented by passage of several ordinances all of which can happen within 90 days, including a public hearing and two required City Council meetings. There is no personal property tax in Illinois, so no approval process is required.





RON RICHARD  
SENATE PRESIDENT PRO TEM  
ROOM 326, STATE CAPITOL  
573-751-2173

GENERAL ASSEMBLY  
JEFFERSON CITY, MISSOURI

TODD RICHARDSON  
SPEAKER OF THE HOUSE  
ROOM 308, STATE CAPITOL  
573-751-4030

October 10, 2017

Holly Sullivan  
Amazon  
Office of Economic Development  
c/o Site Manager Golden  
2121 7th Ave  
Seattle, WA 98121

Dear Ms. Sullivan:

The Missouri General Assembly stands ready to pass comprehensive legislation to assist Amazon in the construction of its second headquarters in Missouri. Over the past weeks since the announcement, the Governor and the Department of Economic Development have been in contact with the General Assembly to discuss the package necessary to welcome Amazon's "HQ2" to our State. We write this letter to lend our support to this effort and to assure Amazon that the Missouri General Assembly is prepared to take action.

It is important to note that the General Assembly has consistently manifested the will to pass special legislation accommodating large expansions of business. In 2008, our chambers passed legislation to incentivize the construction of a Bombardier factory. In 2010, the General Assembly passed legislation for the retention and expansion of Ford and General Motors automotive plants. And in 2013, the General Assembly passed a special incentive package for Boeing to meet its specific workforce needs and strengthen its generations-long partnership with Missouri. The Missouri General Assembly has an unwavering track record of delivering on these promises, and our chambers are prepared to do the same to help Amazon do business in Missouri.

Should any site in Missouri be considered in the next round of negotiations, the necessary legislation to secure that deal will be acted upon by the General Assembly as a legislative priority for both chambers. Beyond this, we want to assure you that Amazon would find a business-friendly atmosphere in the Missouri General Assembly on a going forward basis. On behalf of the Missouri General Assembly, we welcome the opportunity to help Amazon make Missouri its home.

Sincerely Yours,

Ron Richard, President Pro-Tem of the Missouri Senate

Todd Richardson, Speaker of the Missouri House of Representatives









# TIME TO OPERATIONS

4







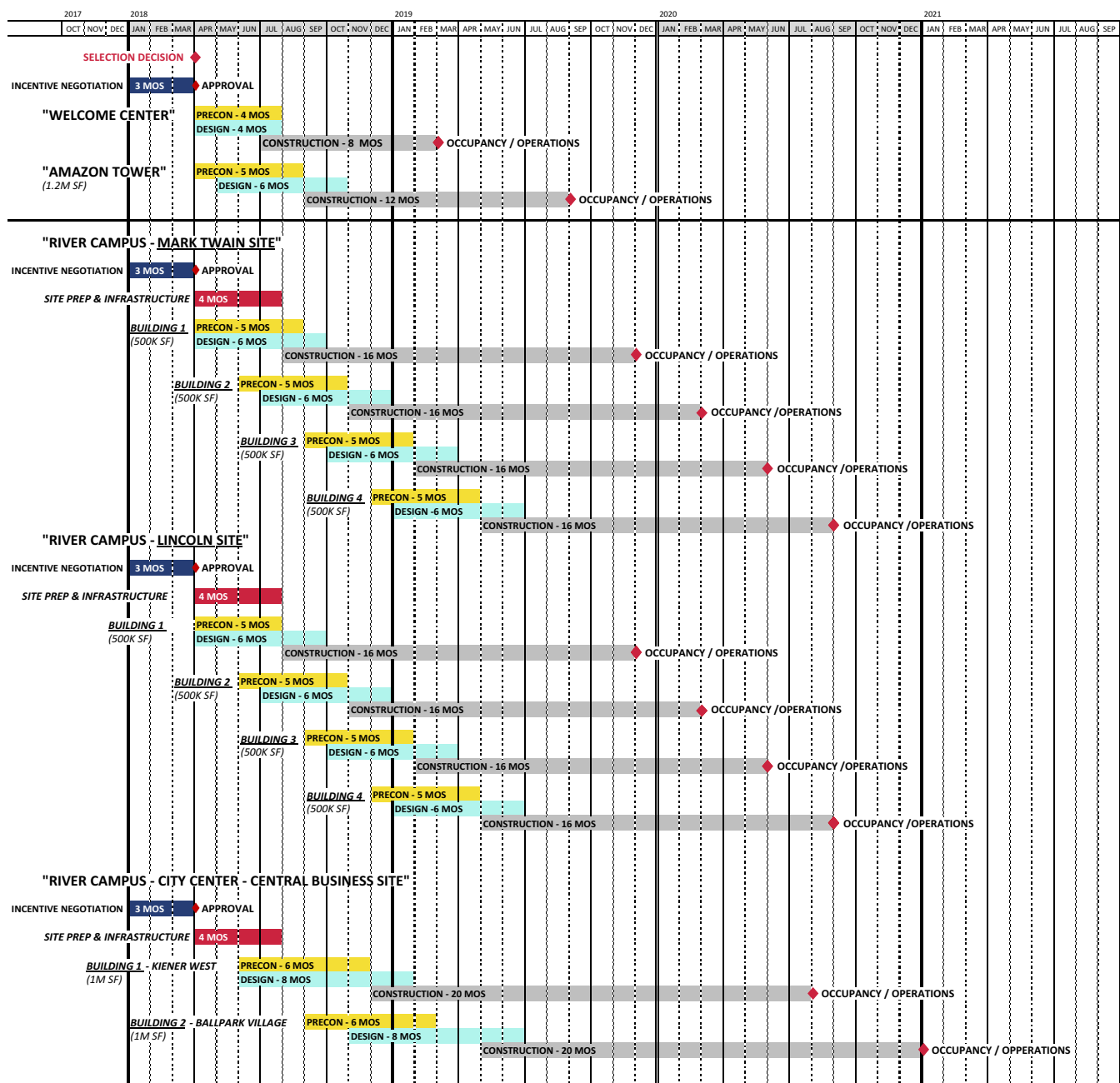
# TIME TO OPERATIONS

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*“The City of St. Louis is a key partner in helping us assemble solutions to the financing challenges unique to downtown urban development. The economic development staff is great to work with, and their ongoing commitment to seeing St. Louis reach its full potential is unwavering.”*

– Bill DeWitt  
President, St. Louis Cardinals

# Time Table to Operations



Currently, the proposed site is served by all required utilities, has the requisite transportation and mass transit access to satisfy Amazon’s needs, and is zoned to support the proposed project in Illinois and in Missouri.

On Day One, St. Louis is prepared to deliver the blueprint for this project, and has prepared a project schedule found to demonstrate our ability to meet Amazon’s aggressive schedule. Also, we commit that within 60-120 days of site selection, all incentives will be in place.

In addition, St. Louis’ regional leaders are committed to developing a structured and empowered inter-governmental working group to expedite development.

**Permitting Process:** The City of St. Louis can issue same-day permits and reduce the time frame for reviewing, approving, and issuing other building permits to between three to five working days following submission of an application. Presently, same-day permits make up over 80 percent of all building permits issued.



Amazon will be assigned a central contact person to shepherd the HQ2 project. The project will move as quickly as the design and engineer professionals are prepared to move. As a result of our close collaboration with project teams, it is rare for a permit to be issued later than two to three days after an application is filed.

**Zoning:** No zoning is necessary in Illinois or St. Louis for this site, if used for office or similar purposes. If rezoning becomes necessary to support any other use, the process in the City of St. Louis requires only one public hearing, a Planning & Zoning Commission recommendation, and a City Ordinance. City Ordinances require approval from the Board of Aldermen and the Mayor. Rezoning in the City typically takes 13 - 15 weeks.

**Trades:** Members of the St. Louis Building and Construction Trades Council are committed to ensuring HQ2 is completed on budget on an accelerated schedule. A letter to this effect is included at the end of this section.

## Timetable for Incentive Approvals at the State and Local Levels Including Legislative Approvals

---

The St. Louis region anticipates approval of all local incentives within 60 to 120 days of site selection, and state incentives immediately following the start of the next legislative session in January 2018.

### State of Missouri

The leadership of the Missouri General Assembly is committed to supporting the introduction of legislation for a benefits package for Amazon when the legislative session convenes in January 2018. Such legislation can be pre-filed in December 2017 with an emergency clause that would authorize conferral of the benefits of the package immediately upon passage. The Missouri General Assembly adjourns May 30, 2016.

The Missouri Governor may convene the General Assembly in special session for a maximum of 60 calendar days at any time. The President Pro

Tem and the Speaker may convene a 30-day special session upon petition of three-fourths of the members of each chamber.

### St. Louis

Applications for all incentives related to the City of St. Louis are made to the St. Louis Development Corporation (SLDC), which will coordinate the approval process through the applicable city-controlled authorities, boards and commissions. Most incentives from the City of St. Louis are consistent with past practices and existing programs, and are anticipated to have a high probability of being approved within a 90 - 120 day period.

To the extent that City of St. Louis ordinances are required, the Board of Aldermen can approve ordinances by a simple majority (15 of 28). Two of the three members of the St. Louis City Board of Estimate and Apportionment (E&A) must also approve before the Board of Aldermen's final vote. The Mayor, City Comptroller, and President of the Board of Aldermen constitute the three-member Board of E&A. Letters evidencing support by a supermajority of the Board of Aldermen and a majority of E&A for the incentives are attached.

Applications for St. Louis County incentives are made through the St. Louis Economic Development Partnership (SLEDP), which will usher the incentive package through required county approvals. The proposed incentives from St. Louis County are consistent with past practices and existing programs, and are anticipated to have a high probability of being approved within a 90-day period.

### State of Illinois

The leadership of the Illinois General Assembly is committed to supporting the introduction of legislation for a benefits package for Amazon when the legislative session convenes in 2018. It adjourns in May or June. In Illinois, a special session can be called by joint proclamation by the presiding officers of both houses. The proposed incentives from the State of Illinois are consistent with past practices and existing programs, and are anticipated to have a high probability of being approved within no more than 90 days.

## St. Clair County

The City of East St. Louis has agreed to establish a new Tax Increment Finance (TIF) District for the Illinois site on the Illinois riverfront. The new TIF would have an initial existence of 23 years. The new TIF could be created within eight weeks once the required TIF feasibility study is completed within 30 days.

## Government Structure and Elected Officials

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### Regional

The St. Louis regional economic development coordinating organization is the St. Louis Economic Development Partnership (SLEDP).

### St. Louis County

County Executive and seven-member County Council

### City of St. Louis

Mayor and 28-person Board of Aldermen

### St. Charles County

County Executive and seven-member County Council

### St. Clair County, IL

Board Chairman and 29-person Board

### City of East St. Louis, IL

Mayor and five-member City Council

In St. Clair County and East St. Louis, Ill., the leadership at the highest levels will be sure that any need Amazon has will receive personal attention and expedited approvals.

On our largest projects, such as HQ2, a staffer within the Building Division will be assigned to Amazon to work in close cooperation with the HQ2 project team to ensure permits are approved quickly.

Through our successful work with the mixed-use Ballpark Village downtown redevelopment, the expansion of the BJC Healthcare Campus Renewal Project, and other large projects, we have a demonstrated record of service to local partners to bring projects to market on time. Recent projects that have benefitted from the region's stable and consistent business climate include:

- Express Scripts constructed its new headquarters in 2005 and has expanded six times since. Each expansion has received the full support of state and local elected officials.
- Centene Corporation constructed its new headquarters in 2009, and has made significant investments again this year. The expansion has received broad support, including economic incentives.
- Cortex Innovation District continues to receive the investment and legislative support to continue its growth in a desirable and predictable manner.

## Evidence of a Stable and Consistent Business Climate in St. Louis

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St. Louis' regional leaders are committed to developing a structured, empowered, intergovernmental working group to ensure Amazon has authority to act as a Master Developer. Elected officials are committed to transparency and public input with an emphasis on fair dealing with both residents and business leaders. Amazon will have one contact to facilitate interactions between the company, local, and state governments.



## Evidence of Elected Officials Meeting Aggressive Project Timelines

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The following testimonials capture endorsements from corporate leaders and elected officials who have managed large development projects in the St. Louis region. Any of the following, and others who are quoted in related sections or our video submission, are available to visit further with Amazon executives seeking more information about the ease of doing business in St. Louis.

*“The City of St. Louis is preparing a 97 acre site for NGA which has required acquisition and consolidation of 551 properties, removal of 137 structures, soil remediation, and rerouting utilities all within an expedited timeframe. The City has established a strong communication structure with a single point of contact. I welcome any questions Amazon may have regarding the support we have received from the City of St. Louis.”*

Susan Pollmann

Program Director, National  
Geospatial-Intelligence Agency

*“The Cardinals have been working with the City of St. Louis on downtown development efforts for many years. The current Busch Stadium, which opened in 2006, was built for \$411 million as part of a public/private partnership with the City of St. Louis and State of Missouri. As part of that project, we ended up controlling 10 acres adjacent to the stadium, which we have turned into a highly successful development concept called Ballpark Village. In both the first phase (\$100+ million retail/entertainment project), which opened in 2014, and the second phase (\$260 million office, residential, hotel, and retail project), which is scheduled to open in 2019, the city has been a key partner in helping us assemble solutions to the financing challenges unique to downtown urban development. The city development staff has been great to work with and their ongoing commitment to seeing St. Louis reach its full potential has been unwavering.”*

Bill DeWitt

President, St. Louis Cardinals





“The Cortex Innovation Community initiative is a highly visible and successful public/private economic partnership. Its success can be directly attributed to the close working relationship that Cortex has with the City of St. Louis. The city approved a 200-acre redevelopment plan, making Cortex the master developer, and approved a Tax Increment Financing district overlay with multiple sub-areas that are activated individually as we build out the district, thus preserving the incentives. In addition, without the direct assistance of the city, Cortex would not have been successful in securing a federal TIGER grant to fund a new \$13M MetroLink light rail station in the District. I have worked in three cities developing urban innovation districts, and can say without reservation that St. Louis has been the most committed public partner of the three.”

Dennis E. Lower

President & CEO of Cortex Innovation Community

“I have had the opportunity to work with the City of St. Louis and your St. Louis Development Corporation over the past 15 years in the development of over 20 buildings. These projects have comprised over a million square feet, and hundreds of millions of dollars in investment. In my experience, the city has always been tremendously helpful in assisting me on my developments. Your team is smart, creative, and quite frankly, terrific to work with. What has really impressed me is that your team understands the complexities of urban development and they work very hard to solve problems and pave the way for a mutually beneficial outcome.”

Steve Smith

President & CEO of The Lawrence Group

# Examples of Substantial Public-Private Collaboration in St. Louis

Several recent projects demonstrate the capacity for elected and appointed government officials, public entities, and private organizations to collaborate. Evidence of substantial cooperation between governmental agencies is highlighted below.

## **St. Louis Economic Development Partnership**

Serving as the one-stop shop for relocating or expanding a business in St. Louis City and County, SLEDP is the economic development team that provides a broad range of services to support innovation and entrepreneurship. The organization increases the region's global connectivity and improves neighborhoods through targeted real estate redevelopment. The Partnership is the only accredited economic development organization in the region.

## **St. Louis Development Corporation (SLDC)**

Serving as the City of St. Louis' economic development organization, SLDC focuses on real estate and neighborhood development and coordinates the process for approval of incentives granted by the City. SLDC led the retention efforts to retain The National Geospatial Intelligence Agency (NGA). This \$1.75 billion project will retain 3100 employees within the City. SLDC works closely with the St. Louis Economic Development Partnership (SLEDP) on all business retention and attraction initiatives in the City.

## **CityArchRiver**

St. Louis' transformation of the iconic Gateway Arch grounds is the largest public/private partnership of its kind, setting a new bar for what the public and private sectors can achieve together. The \$380 million renovation will open summer of 2018 – under budget. Its first-ever makeover in 50 years, the Gateway Arch grounds have been renovated to promote better accessibility between the Mississippi River, the Arch, and the city. The new site includes: five and a half new miles of pathways and bike trails; 7.5 acres of usable park space; an amphitheater; easier river access; a 46,000-square-foot museum space with new interactive exhibits; 11 acres of new park space, including 5.5 miles of new pathways; and a park that extends over I-70, connecting the Old Courthouse to the Arch grounds. Partnering in the renovation is the National Park Service, Great Rivers Greenway, Gateway Arch Park Foundation, Bi-State Development, Jefferson National Parks Association, the City of St. Louis, and the State of Missouri.

## **East-West Gateway Council**

As a Regional Council of Governments (COG), East-West Gateway Council of Governments (EWG) provides a forum where local governments in the St. Louis region can coordinate to address and solve problems that cross jurisdictional boundaries. EWG facilitates cooperative planning and problem-solving among any of its member local governments. EWG is also the federally designated metropolitan planning organization (MPO) for the St. Louis region, which includes the City of St. Louis; Franklin, Jefferson, St. Charles, and St. Louis counties in Missouri, along with Madison, Monroe, and St. Clair counties in Illinois. As the St. Louis region's MPO, the federal government and the states of Missouri and Illinois have vested EWG with legal authority and responsibility for implementing the federal metropolitan transportation planning process in the St. Louis Metropolitan Planning Area.

## **Great Rivers Greenway**

GRG makes the St. Louis region a more vibrant place to live, work and play by developing a network of greenways to connect people to their rivers, parks and communities. In 2000, the a 1/10th of a cent sales tax passed in three counties in Missouri and two counties in Illinois to begin the bi-state greenway network. In 2013, a subsequent 3/16th sales tax passed in two counties in Missouri to add additional funding for the CityArchRiver project and additional greenways in the City of St. Louis and St. Louis County. In 2016, two million people enjoyed the 113 miles of the GRG, and community volunteers gave 10,300 hours to benefit greenways, rivers, creeks, and streams. St. Louis City, St. Louis County, and St. Charles County, collaborate through GRG.

## **Bi-State Transportation**

The transformation of the 48-mile, MetroLink light rail system is a direct result of a partnership between the bi-state development agencies and the local governments in both St. Louis and St. Clair County, IL. Today, the Bi-State Council of Governments works to solve problems that cross jurisdictional boundaries to ensure passengers benefit from St. Louis' light rail. Today's rail service connects the region's two major airports – St. Louis-Lambert International Airport and MidAmerica Airport in Shiloh, IL. The connector is a great example of public-private partnership that began in 1993, with initial transport between Missouri and Illinois, through a collaboration between St. Clair County, Ill.; St. Charles County, Mo.; the City of St. Louis; and St. Louis County.



# Evidence of Substantial Public-Private Collaboration in the State of Missouri for HQ2

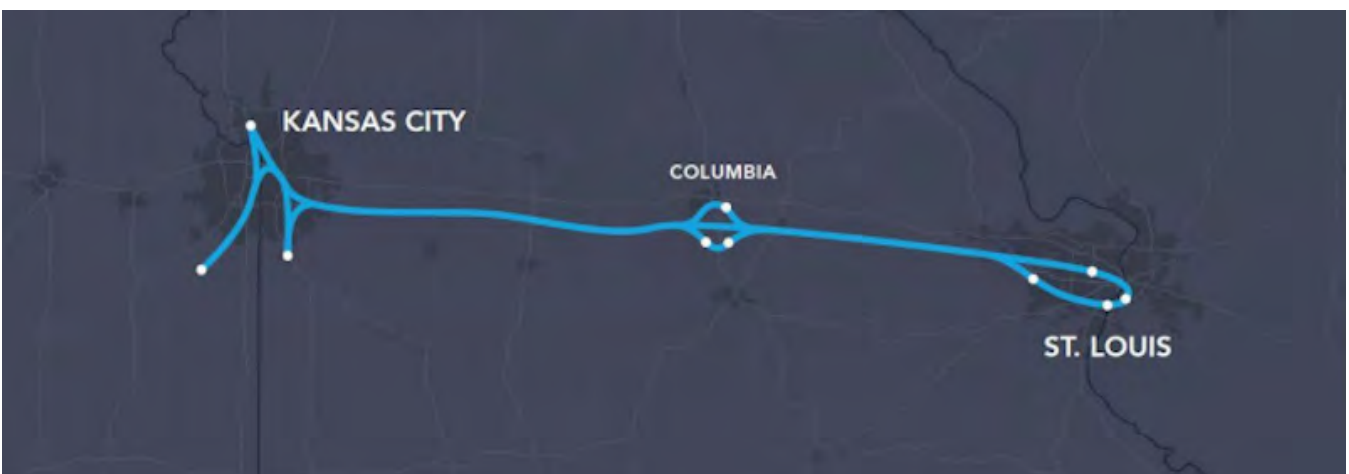
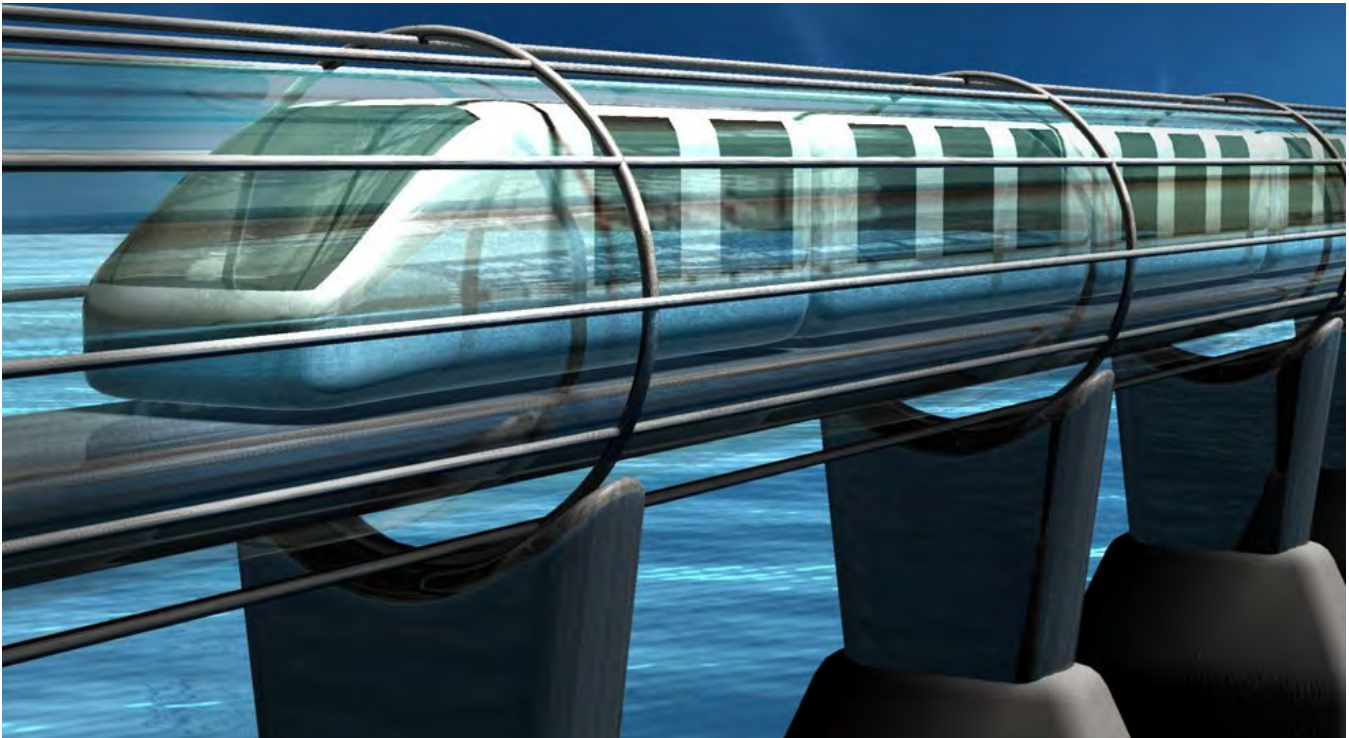
It is important to note as part of this proposal that we identify ourselves as not just a single MSA, but as part of a larger region spanning the Heartland of America.

Within moments of receipt of the HQ2 RFP, the State of Missouri began a coordinated effort to put forth a concept with the potential for an innovative approach to link St. Louis and Kansas City into one integrated whole to support HQ2.

Amazon will receive, therefore, not two, but three proposals from Missouri. The two major metropolitan areas representing Missouri's east and west borders are submitting independent proposals. Concurrently, the State of Missouri

is also submitting its own proposal. The State's proposal outlines not only the support to each metropolitan area but also the State's vision for how Amazon could partner with Missouri to link together the two metropolitan areas.

Amazon is a company built on big ideas. Imagine the power of Amazon working with local leaders and communities to make two impressive MSAs even stronger, and to transform them and everything in between into a model of urban development.





# Evidence of Elected Officials Eager and Willing to Work with Amazon

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*“As Mayor of the City of St. Louis, I affirm my wholehearted commitment to champion the necessary legislation to support the state and local incentives for Amazon’s second headquarters. The City and its elected stand ready, from ‘Day One,’ to deliver on our legislative proposals in order to catalyze Amazon’s investment in our community.”*

**Lyda Krewson**

Mayor, City of St. Louis City

*“We want to reaffirm our strong commitment to provide the necessary incentives that support Amazon’s location in our community. We are proposing that we collaborate to transform regional education opportunities and infrastructure. In addition, some of the incentives will be structured in a manner that support Amazon’s workforce needs and historical barriers to education and opportunity for our most vulnerable residents.”*

**Board of Aldermen**

City of St. Louis

*“We, and our State of Illinois and City of St. Louis partners, are proud to be a part of this regional effort. We have been undertaking major road improvements in the site area. We also offer workforce development programs as do our Missouri partners, which include recruitment and customized training.”*

**Mark A. Kern**

Chairman, St. Clair County Board

*“Not only do I support this new and exciting development at St. Louis Lambert International Airport, but I am committed to providing all necessary resources for St. Louis to be selected. From ‘Day One,’ the St. Louis region will work together with Amazon to ensure seamless integration into our community. Our region will align with Amazon to provide the most effective execution of this proposal, and we look forward to working with you. Please do not hesitate to reach out to me directly should you have questions about our proposed incentives or the St. Louis regional proposal.”*

**Steven V. Stenger**

St. Louis County Executive

*“I recognize this is a wonderful opportunity for the City of East St. Louis and the entire region. The outcome will be transformational. The City of East St. Louis is thrilled to be an active partner and support the region’s application for Amazon HQ2. I hope you will favorably consider our proposal for Amazon to call our region home.”*

**Emeka Jackson-Hicks**

Mayor, City of East St. Louis

*“The Metro Mayors of St. Louis is an organization of the mayors of cities with a population of 10,000 or more in St. Louis, St. Charles, Franklin, and Jefferson counties. The mission of Metro Mayors is to work in collaboration for the betterment of the St. Louis region. We believe that cooperation is necessary for an attractive, dynamic and growing region...our citizens are supportive of bringing Amazon to this area.”*

**Gerry Welch**

Mayor, Webster Groves

President, Metro Mayors of St. Louis



UNCLASSIFIED

**NATIONAL GEOSPATIAL-INTELLIGENCE AGENCY**

7500 GEOINT Drive  
Springfield, Virginia 22150

October 10, 2017

To whom it may concern:

The National Geospatial- Intelligence Agency (NGA) has had a strong working relationship with the City of St. Louis since June of 2016, when NGA chose North St. Louis as the preferred site for constructing its new western campus, referred to as the Next NGA West. This selection was a competitive evaluation of over 100 locations in Missouri and Illinois and included a rigorous environmental feasibility process.

This close working relationship between NGA and the City of St. Louis has made it possible for the City to work with Federal, State and Local Government Agencies to provide the 97 acre site to NGA in 2018. This process, some of which is still underway, has included acquiring and consolidating 551 properties into one, removing 137 structures, rerouting utilities, and soil remediation; all within an expedited timeframe. Above all, the strong communication structure established for this project has made this all possible. The City provided a single point of contact for the site preparation activities and a single point of contact for all activities outside of the site including community engagement, providing a new full highway interchange, and improvements to the streets leading to the site.

The NGA mission of "Know the Earth...Show the Way...Understand the World," will be well-represented by the new location in St. Louis. As our Director Robert Cardillo expressed to the Senate Select Committee on Intelligence (SSCI) in 2016: "The new campus in St. Louis, Missouri, will afford us the opportunity to create a place where we can grow our partnerships with industry and academia in a more open and flexible environment to enable our mission through the 21st century." We are hopeful that a continued relationship with the City of St. Louis will help our agency and the City achieve this mutually beneficial goal.

I am happy to answer any questions you may have regarding our project and the support we have received from the City of St. Louis. I can be reached by telephone at 314-676-0174 or via email at [susan.r.pollmann@nga.mil](mailto:susan.r.pollmann@nga.mil).

Sincerely,

Susan R. Pollmann  
Program Director, Next NGA West

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*Value on Display. Every Day.*

2300 Hampton Avenue, Suite B • St. Louis, MO 63139 • Phone: (314) 647-0628 • Fax: (314) 647-0631

JOHN STIFFLER  
Executive Secretary/Treasurer  
E-mail: john@stlbctc.org

MICHAEL MAHLER  
President

FRANK D. JACOBS  
Vice President

October 3, 2017

Ms. Sheila Sweeney  
St. Louis Economic Development Partnership  
7733 Forsyth, Suite 2200  
St. Louis, MO 63105

Dear Sheila,

The St. Louis Building and Construction Trades Council, and our affiliates, are writing to inform you of our strong commitment to securing the Amazon Headquarters 2 in the St. Louis Region. We thank you for seeking our input and applaud your efforts, along with your tenacity, in leading this regional endeavor to secure the headquarters for our region.

We are committed to having our members available for Amazon related projects, to accelerating the delivery of the project, and to ensuring that it is completed on time and on budget. Our network of workers extends beyond the immediate St. Louis area and the St. Louis building trades has the ability to staff a project of this size and scale, which would have the added benefit of bringing new workers into the construction trades.

The St. Louis Building and Construction Trades, despite the economic downturn of the past decade, has continued to train and improve the skills of all members. In fact, in the last year alone, the various trades have spent over \$25 million on training. Not a single taxpayer dollar was spent on this training, which was funded by our members and unions.

In addition to training our existing workforce, we have created, and are implementing, the Building Union Diversity Program. This program enables disadvantaged minorities to gain access to federally recognized apprentice programs and assists these individuals in securing a career in the building and construction trades.

It should be noted, that a project of this size would immediately turn around the sometimes-sluggish construction industry in the St. Louis area. At the same time, it would provide opportunities for new individuals to begin a career in the construction trades.

We are committed to assisting your office and regional organizations in finding ways to secure the Amazon Headquarters 2 in the St. Louis Region. The opportunity to take part in a project of this size and scale has the potential to transform the industry and our workers in the region for decades to come.

Please free to contact me at any time.

Sincerely,

John J. Stiffler  
Executive Secretary-Treasurer  
JJS/gk





Jewel Box at Forest Park





**LABOR FORCE**





# LABOR FORCE

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*“The St. Louis region’s labor force of more than 1.3 million is talented and diverse. A reasonable cost of living means employers can hire well and employees can enjoy a great quality of life. For these reasons, Square expanded its offices into St. Louis which is now our fastest-growing location.”*

– Jim McKelvey

Founder  
LaunchCode  
and Co-Founder  
Square

Does St. Louis have the relevant talent pool for Amazon’s needs, and what is the blueprint for sustained talent pool growth?

Yes we do. Currently, the U.S. Bureau of Labor Statistics estimates the St. Louis tech talent labor pool is in excess of 52,000. Additionally, St. Louis has one of the largest STEM workforces in the country, with more than 80,000 employed in these highly specialized

occupations. And it’s not just St. Louis — it’s the entire state of Missouri, which has more than three million highly educated workers.<sup>1</sup> The U.S. Census Bureau reports that professional, scientific, technical, and administrative support services have consistently increased overall employment in Missouri since 2010.

The following table quantifies the St. Louis region’s labor and wage rate information in the general job categories of relevance to Amazon.

Current Labor Pool and Wage Rates for Relevant Job Categories in the MSA

JOB CATEGORY	LABOR POOL	AVERAGE WAGE RATE
Executive/Management	78,978	\$115,000
Engineering/IT (SDE preference)	10,032	\$102,550
Legal	10,392	\$91,600
Accounting	15,943	\$39,700
Administrative	221,323	\$37,100

The quality of the St. Louis labor pool is a primary reason why nine of Missouri’s 10 Fortune 500 companies are located in St. Louis.

Current Rates of Total Unemployment for Relevant Job Categories

JOB CATEGORY	UNEMPLOYED	UNEMPLOYMENT RATE
Executive/Management	1,189	1.5%
Engineering/IT	1,166	2.5%
Legal	84	0.8%
Accounting	2,181	2.9%
Administrative	8,530	3.7%

For a complete occupation snapshot of all jobs in the St. Louis MSA as of Q2 2017, inclusive of the above job categories, see the full chart on page 125.

<sup>1</sup> Economic Development at the University of Missouri  
<http://economicdevelopment.missouri.edu/workforce/starting-salaries-placement-rates.php>





TITLE	CURRENT		
	PAST 4 QUARTERS		
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT
Compliance Officers	2,248	\$63,200	0.90
Cost Estimators	2,515	\$69,100	1.24
Human Resources Specialists	4,880	\$63,000	0.98
Farm Labor Contractors	2	\$46,300	0.23
Labor Relations Specialists	1,110	\$65,000	1.52
Logisticians	1,717	\$75,500	1.24
Compensation, Benefits, and Job Analysis Specialists	767	\$66,100	1.00
Accountants and Auditors	12,686	\$75,700	1.02
Budget Analysts	442	\$72,900	0.85
Credit Analysts	815	\$76,300	1.17
Financial Analysts	2,798	\$94,600	1.01
Personal Financial Advisors	3,116	\$107,300	1.33
Insurance Underwriters	905	\$82,000	1.03
Financial Examiners	820	\$73,900	1.74
Credit Counselors	411	\$54,800	1.34
Loan Officers	3,452	\$86,000	1.22
Tax Examiners and Collectors, and Revenue Agents	217	\$70,600	0.41
Tax Preparers	776	\$38,000	0.98
Financial Specialists, All Other	1,251	\$82,800	1.08
Bill and Account Collectors	3,706	\$32,700	1.34
Billing and Posting Clerks	5,039	\$37,100	1.09
Bookkeeping, Accounting, and Auditing Clerks	15,943	\$39,700	1.02
Payroll and Timekeeping Clerks	1,481	\$39,800	0.99
Procurement Clerks	736	\$39,000	1.15
Financial Clerks, All Other	444	\$39,300	1.30
Brokerage Clerks	1,316	\$46,000	2.39
Credit Authorizers, Checkers, and Clerks	369	\$38,000	1.08
Loan Interviewers and Clerks	2,619	\$40,200	1.27
<b>Total Accounting</b>	<b>72,579</b>	<b>\$60,000</b>	<b>1.09</b>

Source: JobsEQ.® Data as of four quarters ending June 30, 2017. Note: Figures may not sum due to rounding.

\*Occupation wages are as of 2016 and should be taken as the average for all Covered Employment..

## Q2 2017 Occupation Snapshot – Information Technology Labor Pool

ST. LOUIS MSA

TITLE	CURRENT		
	PAST 4 QUARTERS		
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT
Computer and Information Systems Managers	3,317	\$138,700	0.98
Computer and Information Research Scientists	149	\$89,200	0.55
Computer Systems Analysts	6,395	\$93,700	1.15
Information Security Analysts	1,437	\$89,100	1.52
Computer Programmers	3,406	\$85,000	1.25
Software Developers, Applications	6,858	\$99,200	0.88
Software Developers, Systems Software	3,174	\$105,900	0.78
Web Developers	1,236	\$67,900	0.84
Database Administrators	1,277	\$91,300	1.15
Network and Computer Systems Administrators	4,095	\$84,300	1.14
Computer Network Architects	1,715	\$98,800	1.11
Computer User Support Specialists	6,358	\$50,100	1.12
Computer Network Support Specialists	2,426	\$60,900	1.37
Computer Occupations, All Other	2,830	\$84,400	1.13
Computer Hardware Engineers	246	\$95,600	0.36
<b>Total Information Technology</b>	<b>44,920</b>	<b>\$87,900</b>	<b>1.04</b>

## Q2 2017 Occupation Snapshot – Legal Labor Pool

ST. LOUIS MSA

TITLE	CURRENT		
	PAST 4 QUARTERS		
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT
Lawyers	6,880	\$118,200	0.96
Judicial Law Clerks	54	\$52,600	0.46
Administrative Law Judges, Adjudicators, and Hearing Officers	99	\$108,700	0.75
Arbitrators, Mediators, and Conciliators	74	\$49,500	1.06
Judges, Magistrate Judges, and Magistrates	156	\$125,900	0.66
Paralegals and Legal Assistants	2,575	\$50,000	1.01
Court Reporters	120	\$59,900	0.66
Title Examiners, Abstractors, and Searchers	593	\$45,200	0.92
Legal Support Workers, All Other	380	\$53,600	0.80
<b>Total Legal Occupations</b>	<b>10,932</b>	<b>\$91,600</b>	<b>0.94</b>

Source: JobsEQ.® Data as of four quarters ending June 30, 2017. Note: Figures may not sum due to rounding.

\*Occupation wages are as of 2016 and should be taken as the average for all Covered Employment.

TITLE	CURRENT		
	PAST 4 QUARTERS		
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT
Chief Executives	3,111	\$169,700	1.10
General and Operations Managers	20,935	\$117,200	1.02
Legislators	516	\$25,700	1.19
Advertising and Promotions Managers	253	\$115,100	0.86
Marketing Managers	1,751	\$144,300	0.84
Sales Managers	3,592	\$146,700	1.00
Public Relations and Fundraising Managers	614	\$119,700	0.94
Administrative Services Managers	2,677	\$91,900	1.07
Computer and Information Systems Managers	3,317	\$138,700	0.98
Financial Managers	5,430	\$142,000	1.03
Industrial Production Managers	1,678	\$105,100	1.07
Purchasing Managers	762	\$142,300	1.11
Transportation, Storage, and Distribution Managers	1,142	\$96,200	1.07
Compensation and Benefits Managers	164	\$125,000	1.10
Human Resources Managers	1,096	\$123,800	0.88
Training and Development Managers	276	\$117,200	0.83
Farmers, Ranchers, and Other Agricultural Managers	4,019	\$58,200	0.51
Construction Managers	3,116	\$107,100	0.85
Education Administrators, Preschool, Childcare Center/Program	578	\$43,000	1.01
Education Administrators, Elementary/Secondary School	2,232	\$98,100	1.05
Education Administrators, Postsecondary	1,358	\$90,600	1.07
Education Administrators, All Other	274	\$73,300	0.79
Architectural and Engineering Managers	1,545	\$144,800	0.96
Food Service Managers	2,654	\$50,300	0.96
Funeral Service Managers	232	\$55,500	0.86
Gaming Managers	56	\$76,600	1.18
Lodging Managers	337	\$46,600	0.72
Medical and Health Services Managers	3,109	\$107,100	0.97
Natural Sciences Managers	471	\$118,900	0.93
Postmasters and Mail Superintendents	99	\$74,800	0.78
Property, Real Estate, and Community Association Managers	2,781	\$47,900	0.95
Social and Community Service Managers	1,076	\$61,400	0.83
Emergency Management Directors	61	\$64,800	0.76
Managers, All Other	7,663	\$106,900	0.85
<b>Total Management Occupations</b>	<b>78,978</b>	<b>\$115,000</b>	<b>0.93</b>

Source: JobsEQ.® Data as of four quarters ending June 30, 2017. Note: Figures may not sum due to rounding.

\*Occupation wages are as of 2016 and should be taken as the average for all Covered Employment..



## Q2 2017 Occupation Snapshot – Administrative Labor Pool

ST. LOUIS MSA

TITLE	CURRENT		
	PAST 4 QUARTERS		
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT
First-Line Supervisors of Office, Administrative Support Workers	12,840	\$58,200	0.95
Switchboard Operators, Including Answering Service	848	\$30,300	1.00
Telephone Operators	116	\$42,600	1.11
Communications Equipment Operators, All Other	24	\$41,500	0.95
Bill and Account Collectors	3,706	\$32,700	1.34
Billing and Posting Clerks	5,039	\$37,100	1.09
Bookkeeping, Accounting, and Auditing Clerks	15,943	\$39,700	1.02
Gaming Cage Workers	159	\$27,100	0.89
Payroll and Timekeeping Clerks	1,481	\$39,800	0.99
Procurement Clerks	736	\$39,000	1.15
Tellers	5,077	\$27,400	1.13
Financial Clerks, All Other	444	\$39,300	1.30
Brokerage Clerks	1,316	\$46,000	2.39
Correspondence Clerks	115	\$35,400	1.76
Court, Municipal, and License Clerks	1,179	\$33,900	1.07
Credit Authorizers, Checkers, and Clerks	369	\$38,000	1.08
Customer Service Representatives	26,964	\$35,900	1.08
Eligibility Interviewers, Government Programs	1,162	\$40,500	0.94
File Clerks	1,340	\$35,900	1.08
Hotel, Motel, and Resort Desk Clerks	1,537	\$21,500	0.69
Interviewers, Except Eligibility and Loan	2,474	\$31,200	1.41
Library Assistants, Clerical	810	\$25,800	0.95
Loan Interviewers and Clerks	2,619	\$40,200	1.27
New Accounts Clerks	498	\$32,900	1.31
Order Clerks	1,628	\$33,700	0.97
Human Resources Assistants, Except Payroll and Timekeeping	1,297	\$41,200	1.02
Receptionists and Information Clerks	8,720	\$25,600	0.91
Reservation and Transportation Ticket Agents and Travel Clerks	945	\$36,200	0.67
Information and Record Clerks, All Other	1,287	\$41,100	0.86
Cargo and Freight Agents	1,077	\$43,500	1.27
Couriers and Messengers	823	\$30,500	0.95
Police, Fire, and Ambulance Dispatchers	705	\$41,300	0.90
Dispatchers, Except Police, Fire, and Ambulance	2,040	\$43,900	1.08
Meter Readers, Utilities	156	\$49,500	0.47
Postal Service Clerks	626	\$46,100	0.84
Postal Service Mail Carriers	3,578	\$50,500	1.19
Postal Service Mail Sorters, Processors, Processing Machine Operators	1,382	\$48,900	1.16
Production, Planning, and Expediting Clerks	2,866	\$50,900	0.96
Shipping, Receiving, and Traffic Clerks	5,583	\$35,300	0.89
Stock Clerks and Order Fillers	17,605	\$28,100	0.95
Weighers, Measurers, Checkers, and Samplers, Recordkeeping	818	\$28,100	1.16
Executive Secretaries and Executive Administrative Assistants	6,140	\$54,400	1.01
Legal Secretaries	1,802	\$45,400	1.03
Medical Secretaries	6,562	\$33,600	1.26
Secretaries, Administrative Assistants, Except Legal, Medical, Executive	34,045	\$35,100	1.53
Computer Operators	727	\$43,200	1.62
Data Entry Keyers	1,859	\$30,500	1.01
Word Processors and Typists	473	\$33,500	0.64
Desktop Publishers	138	\$52,100	0.99
Insurance Claims and Policy Processing Clerks	3,244	\$48,500	1.25
Mail Clerks and Mail Machine Operators, Except Postal Service	980	\$31,100	1.15
Office Clerks, General	24,335	\$32,700	0.87
Office Machine Operators, Except Computer	581	\$32,100	1.06
Proofreaders and Copy Markers	96	\$37,500	0.70
Statistical Assistants	131	\$40,600	1.08
Office and Administrative Support Workers, All Other	2,280	\$38,000	1.09
<b>Total Office and Administrative Support Occupations</b>	<b>221,323</b>	<b>\$37,100</b>	<b>1.07</b>

Source: JobsEQ® Data as of four quarters ending June 30, 2017. Note: Figures may not sum due to rounding.

\*Occupation wages are as of 2016 and should be taken as the average for all Covered Employment.

**St. Louis was named  
one of the best cities for jobs  
in 2017 by Glassdoor.<sup>2</sup>**

## **Evidence of St. Louis’ Ability to Recruit Talent to the Region**

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Between 2000 and 2013, the St. Louis region attracted 37,000 people ages 25–34 with a bachelor’s degree. That is a 34 percent increase and one of the highest in the country.<sup>3</sup>

According to a just-released study by Software.org: the BSA Foundation Missouri’s software industry added approximately \$7.1 billion in direct value to the 2016 U.S. gross domestic product, ranking in the top 20 nationally, and has more than 150,000 jobs in the software industry.

The best evidence that information technology professionals are attracted to St. Louis is the growth in hiring of IT expertise in the region’s business sector. Nestlé USA centralized its IT operations in St. Louis. KPMG, Cushman & Wakefield, and Square all recently announced additions to their IT departments in St. Louis as well. Square has stated that the St. Louis office is their fastest-growing office in the world. Two additional standout examples of talent recruitment in St. Louis include Boeing and World Wide Technology (WWT).

### World Wide Technology

WWT is the second fastest growing privately held company, and the largest minority-owned company in the U.S. In the past 10 years, WWT has added 3,000 employees and had a 348 percent increase in sales, going from \$2.1 billion to \$9.4 billion. Approximately 50% of WWT’s workforce is technical and the company has an abundant number of employees from the St. Louis region.

### Boeing

In 2015, Boeing opened a new research and technology center in St. Louis with more than 700 engineers and technicians. This move followed Boeing’s announcement of major restructuring to shift engineering work out of Puget Sound and Southern California to new technology research centers established in St. Louis, Huntsville, Ala., and Charleston, S.C. Boeing projected saving more than \$100 million a year by transferring 1,100 research engineering jobs from Seattle, and an additional 200 from the greater Los Angeles area. Boeing cited a cost comparison of \$212,000 per head annually in pay and benefits from the West Coast, versus \$152,000 at the newer engineering centers in Mo., Ala., and S.C.

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<sup>2</sup> “St. Louis among best cities for jobs in 2017” St. Louis Business Journal, Sept. 13, 2017.

<sup>3</sup> “Brain Gain in America’s Shrinking Cities” Aaron M. Renn, Manhattan Institute Civic Report, No. 102, August 2015.

# Recurring Sourcing Opportunities to Hire Relevant Workers

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Within the immediate 15-county metro area, St. Louis has a combined total of nearly 50 two- and four-year colleges and universities. A 2013 study from the Manhattan Institute found the number of people age 25 and older with a college degree or higher in St. Louis increased by 183,000 from 2000 to 2013 – a 42 percent increase.

More detailed information about the individual educational institutions in and around St. Louis is included in the response to Question 6.

## Specific Opportunities to Hire Software Engineers

The St. Louis region has a concentration of colleges and universities with nationally ranked computer science and engineering programs within a 300-mile radius. They add nearly 80,000 well-educated graduates to the labor pool every year in fields that align with Amazon's needs: executive/management, accounting, administration, legal, and information technology.

The following university programs produce the most graduates with degrees in information technology of all colleges and universities within the St. Louis MSA.

**Southern Illinois University – Edwardsville's (SIUE) School of Engineering** is one of the most comprehensive engineering schools in the St. Louis metropolitan region, offering professionally accredited engineering programs, including:

- Computer Engineering – BS, Minor
- Computer Science – BA, BS, MS, Minor
- Mechatronics and Robotics Engineering – BS

The School of Engineering at SIUE has graduated more than 4,500 students, and more than 60 percent of graduates have taken positions in the St. Louis Metro area.

**Washington University in St. Louis' School of Computer Science and Engineering (CSE)** awarded the first computer science PhD in the United States. The School of Computer Science

and Engineering has 2,500 alumni and 299 undergraduate students, 80 graduate students, and 77 doctoral students. Undergraduate students can choose from the following degree programs:

- BS in Computer Science
- BS in Computer Engineering
- Second Major
- Minors

Graduate students can select from the following degree programs:

- PhD in Computer Science or Computer Engineering
- MS in Computer Science
- MS in Computer Engineering
- MEng in Computer Science & Engineering
- Certificate in Data Mining & Machine Learning

Research areas include:

- Computational Systems Biology
- Computer Engineering
- Cyber-Physical Systems & Sensing
- Graphics & Vision
- Human-Computer Interaction
- Machine Learning & Artificial Intelligence
- Networked Systems
- Parallel Computing Technology
- Theoretical Computer Science

**Webster University's Computer Science degree program** has produced over 1,100 graduates in information technology since 2014. Webster University graduates more IT professionals than any other college or university in the St. Louis region on an annual basis. Programs include:

- Programming
- Operating Systems
- Cybersecurity
- Telecommunications
- Data Base Administration
- System Security
- Computer Mathematics & Logic
- Systems Analysis & Design
- Decision Support

Degrees offered include:

- BS in Computer Science
- BS in Computer Science with emphasis in Cybersecurity
- BS in Computer Science with emphasis in Information Technology
- Minor in Computer Science



Beyond the annual pool of new college graduates, St. Louis also has a depth of talent employed by the area's largest and fastest growing companies. St. Louis has 19 companies on the Fortune 1000 list, including Express Scripts, Emerson, Graybar, and Post Holdings. Five of the 10 fastest, and nine of the top 25 fastest-growing companies within St. Louis are technology-focused. The area's largest privately held companies include tech-focused World Wide Technology and IT staffing company Rose International.

### Long-Term Thinking:

#### IT Recruitment and Professional Development Firms & Services

St. Louis is home to two women-owned, nationally recognized IT staffing firms that serve the tech talent needs of organizations around the country: KellyMitchell and Technology Partners.

KellyMitchell is the 57th largest women-owned company in the U.S., with offices in 16 cities, and has earned key supplier awards from Target, Halliburton, and AT&T. Technology Partners provides any IT skill set needed by the nation's largest companies from helpdesk to CIO — especially software developers — and has the largest pool of Java and .NET developers in the region. Among the companies served by Technology Partners for 10+ years: Monsanto, Mastercard, Enterprise Holdings, Wells Fargo, Express Scripts, Nestlé Purina, and Centene.

IT staffing and technology solutions firm Rose International has long been a fixture on the list of largest privately held firms in St. Louis. It employs 300 in the area and recruits in 20 U.S. cities, as well as two locations in Delhi, India.

St. Louis also is home to three of "America's Best Executive Recruiting Firms" as ranked by Forbes in 2017 — Cejka Executive Search, Grant Cooper, and Hollander Horizon International.<sup>4</sup>

In addition, St. Louis hosts one of 31 chapters of the Society of Information Management (SIM). SIM was founded in 1969 to bring together IT leaders to share, network, and collaborate. Members advance the alignment of IT and business, the creation and sharing of best practices, the use of IT to bring to market valuable products and services, IT management and leadership skills development, the education of future IT leaders through their

Regional Leadership Forum (RLF), the influence of university curricula and continuing education, coordination with the IT industry to shape its direction, and legislation/policy that stimulate innovation, economic development, healthy competition and IT job creation. SIM has special interest groups in cybersecurity, enterprise architecture, IT procurement, and women in technology.

St. Louis also hosts one of 45 chapters of the Black Data Processing Associates (BDPA), a professional organization made up of African American IT professionals. Founded in 1977, members engage K-12 and college students to build a pipeline of diverse professionals in the STEM and digital technology fields. BDPA members benefit from programming designed to strengthen their confidence in the areas of: presentation skills, business acumen, relationship building, and building high performing teams.

#### Partners for Customized Recruiting of Tech Talent

Employers in the St. Louis metropolitan region have multiple potential partners to assist with talent recruitment and training. The following organizations often collaborate with large employers, working to recruit talent from the 15-county MSA.

In Missouri, MoJobs is an innovative statewide online platform operated by the State of Missouri Department of Economic Development. MoJobs helps employers connect with skilled job seekers, hiring and recruiting events, customized training assistance, workforce certification, and other business services at no cost. MoJobs also manages a consulting arm and multiple incentive programs.

PluggedIn is a career matchmaking platform that connects tech job seekers with high growth companies. They also partner with local community organizations and businesses to produce tech talent summits and career fairs.

The St. Louis Agency on Training and Employment (SLATE) offers job seekers and businesses, including tech companies, a variety

of no-cost services related to employment, job training, and career advancement. SLATE collaborates with the Missouri State

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<sup>4</sup> "America's Best Recruiting Firms 2017" Forbes, May 3, 2017.

Department of Economic Development, Division of Workforce Development, the City of St. Louis Mayor's Office, and other partners to operate SLATE Missouri Career Centers. These centers connect employers to qualified professionals, and provide training and placement services for IT professionals.

SLATE has training partnerships with Npower, Midwest Cyber Center, Launch Code, St. Louis Community College, Ranken Technical College, and Thomson Reuters. Corporate partners include World Wide Technology, Cisco, Citi, Bank of America, Verizon, JP MorganChase, Service Now, Dell, Charter Spectrum, AT&T, TD Ameritrade, and Accenture. SLATE also manages apprenticeships in partnership with the U.S. Department of Labor, including: A+ certification, cybersecurity, and software developer/coding.

The Business Service Group of St. Louis County assists companies with their employment needs by pre-qualifying prospects for open positions. Services offered include customized career fairs and on-site recruitment.

St. Charles County Department of Workforce & Business Development operates the Missouri Job Center of St. Charles County. Services include customized recruiting at no charge, job fairs, and on-site recruiting.

Illinois workNet serves the IL counties in the St. Louis MSA. The agency offers over 40 online resources for talent recruitment. Employers also can utilize Illinois workNet service finder or a Business Service Team (BST) of workforce partners trained to help employers with their needs. Recruitment services offered by BSTs include: workplace assessments, labor market information and economic snapshots, job posting and recruitment, candidate matching and referrals, pre-employment screening, job fairs, hiring benefits and tax incentives, state and federal resources for hiring unique applicants, and training opportunities.

## Unique Approaches for Recruiting Tech Talent

Better Weekdays is a St. Louis-based technology startup. Their flagship application, The Whether, creates the ideal conditions for employers to easily attract, engage, and hire millennials.

Employers also can connect informally with regional talent at the Venture Café, located in the Cortex Innovation District. Venture Café is the region's premier weekly, free networking event for engineers, scientists, developers, designers, investors, and more. The Cortex Innovation Community hosts more than 4,000 IT professionals. Similarly, downtown's technology incubator and co-working space, T-REX, is home to 180 startups and 2,200 jobs.

At the University of Illinois, students interested in working in the Research Park, a tech-based business environment encouraging collaboration between private enterprise and the university system, connect with employers through annual career fairs. Among the companies that successfully recruit tech students for Research Park operations: ADM, Ameren, and Yahoo.

Scott Air Force Base is the largest employer in Illinois south of Springfield, and employs 13,000 workers (active duty, civilian, contract civilian, active Reserve, and Guard). Most significant are the 30,000 retirees who stay in the region after retiring. Active duty officers and enlisted are still in their 40s when they retire with full benefits, and most of these retirees have advanced degrees in cybersecurity, information assurance, and management.





# Inclusion in the Development of Tech Talent in St. Louis

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As the demographics in the United States shift to minority-majority by 2040, it is increasingly important to prepare diverse populations for careers in technical fields. The St. Louis region has a number of programs that are expanding the region's pool of technical talent by engaging diverse populations.

## Big Idea: LaunchCode

LaunchCode was founded by Square Co-Founder Jim McKelvey in St. Louis in 2014. This is an ambitious program focused on solving the nation's tech talent gap. LaunchCode has helped train more than 900 people for tech careers with free, open, and inclusive classes that enrolled 2,576 people from around the country. LaunchCode intentionally recruits from underserved communities. Of those currently enrolled, 52 percent are female and 46 percent are people of color.

LaunchCode's main educational program, LC101, is a 20-week, part-time, free program that quickly and effectively prepares workers for coding jobs. In the summer of 2017, LC101 trained 300 people in the region to become software developers. In St. Louis, LaunchCode currently offers job-focused coding training at a rate of 500 people per year, with an expected graduation rate of 250 per year.

Deliberately built to be efficient and scalable, LaunchCode is prepared to ramp up its classes to help Amazon fill staffing needs by training nearly 3,000 students per year.

## Big Idea: CoderGirl

CoderGirl is a LaunchCode Education program. It is a year-long tech-training program consisting of two, six-month cycles. CoderGirl provides professional mentors from companies like Climate Corporation, Asynchrone, and World Wide Technology.

## Big Idea: NPower

NPower is a national program in six states and Canada that serves military veterans and young adults from underserved communities. NPower offers a free 22-week IT training and development program. The program prepares students to earn the CompTIA A+ certification, and pursue advanced coursework in cybersecurity, coding, and IT service management. The St. Louis location is on the campus of Harris-Stowe State University.

## Big Idea: Claim Academy

Claim Academy is a St. Louis-based developer boot camp that offers 12-week classes in Full Stack Java and .NET/C# programming, as well as shorter classes in software development, technology, and career development. Claim Academy has a 95% placement rate, and graduates are currently employed, or are contracted with, Mastercard, Scottrade, Centene, Mercy, RGA, Daugherty Business Systems, and others. Claim Academy is an accredited and approved center for workforce development, as designated by the Missouri Workforce Development Board.

## Big Idea: Louis Stokes Alliances for Minority Participation

In 2016, Harris-Stowe announced that an alliance of eight Missouri colleges and universities jointly received a \$5 million grant from the National Science Foundation's Louis Stokes Alliances for Minority Participation (LSAMP) program. Called MoLSAMP, the consortium consists of two historically black colleges: Harris-Stowe State University and Lincoln University; three major research institutions: the University of Missouri – Columbia, the University of Missouri – St. Louis and Washington University in St. Louis; a regional comprehensive university: The University of Central Missouri; a highly selective liberal arts university: Truman State University; and the Center for Plant and Life Sciences at St. Louis Community College.

The LSAMP program provides funding to alliances that implement comprehensive, evidence-based, innovative, and sustained strategies. This ultimately results in the graduation of well-prepared, highly qualified students from under-represented groups who pursue graduate studies or careers in STEM.

The program assists universities and colleges in their efforts to significantly increase the number of students matriculating into and successfully completing high-quality degree programs in STEM disciplines, in order to diversify the STEM workforce. Particular emphasis is placed on transforming undergraduate STEM education through innovative, evidence-based recruitment and retention strategies, and relevant educational experiences in support of racial and ethnic groups historically under-represented in

STEM disciplines: African-Americans, Hispanic Americans, American Indians, Alaska Natives, Native Hawaiians, and Native Pacific Islanders.

By 2021, MoLSAMP aims to double the number of under-represented minority STEM graduates in Missouri each year.

Big Idea: Harris-Stowe State University

Harris-Stowe State University (HSSU) is the only HBCU in the Metro area with an African-American enrollment of approximately 83 percent. HSSU is a top producer of graduates in STEM disciplines, and the university continues to expand programs and increase enrollment to meet the workforce needs of area employers.

Harris-Stowe ranked No. 1 in Missouri in granting degrees in mathematics and statistics to African-Americans, according to Missouri Department of Higher Education and Diverse: Issues in Higher Education, a newsmagazine that has ranked institutions conferring the most degrees to minority students for the past 30 years.

Harris-Stowe State University Pipeline for Professions Aligned with Amazon

	2012	2013	2014	2015	2016	2017-2022
Accounting	73	66	65	57	58	319
Business Administration	325	283	259	301	287	1455
Finance				1	6	7
Information Sciences/Computer Tech.	67	53	49	51	42	262
Total Enrollment	1484	1298	1280	1390	1464	6916
Relevant Amazon Degree Enrollment						2043

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017					FORECAST			
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS			
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE	EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS*	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND	AVG. ANNUAL GROWTH %
Chief Executives	3,111	\$169,700	1.10	29	0.9%	134	0.9%	0.8%	1.3%	26	627	-240	-0.8%
General and Operations Managers	20,935	\$117,200	1.02	363	1.7%	1,316	1.3%	1.6%	2.0%	431	5,448	202	0.1%
Legislators	516	\$25,700	1.19	0	n/a	-2	-0.1%	0.0%	0.3%	0	107	-34	-0.7%
Advertising and Promotions Managers	253	\$115,100	0.86	6	2.1%	21	1.8%	1.6%	2.0%	3	82	-5	-0.2%
Marketing Managers	1,751	\$144,300	0.84	29	1.6%	104	1.2%	1.7%	2.1%	538	437	62	0.3%
Sales Managers	3,592	\$146,700	1.00	67	1.8%	167	1.0%	1.2%	1.8%	363	875	-20	-0.1%
Public Relations and Fundraising Managers	614	\$119,700	0.94	5	0.8%	32	1.1%	1.3%	1.7%	67	213	2	0.0%
Administrative Services Managers	2,677	\$91,900	1.07	60	2.2%	131	1.0%	1.2%	1.7%	2	487	47	0.2%
Computer and Information Systems Managers	3,317	\$138,700	0.98	64	1.9%	205	1.3%	2.4%	2.5%	151	410	296	0.9%
Financial Managers	5,430	\$142,000	1.03	99	1.8%	238	0.9%	1.0%	1.5%	657	1,356	24	0.0%
Industrial Production Managers	1,678	\$105,100	1.07	38	2.2%	83	1.0%	1.5%	0.9%	70	542	-144	-0.9%
Purchasing Managers	762	\$142,300	1.11	12	1.6%	39	1.1%	1.3%	1.3%	70	177	-30	-0.4%
Transportation, Storage, and Distribution Managers	1,142	\$96,200	1.07	25	2.1%	80	1.5%	1.5%	2.0%	75	270	-38	-0.3%
Compensation and Benefits Managers	164	\$125,000	1.10	4	2.6%	8	1.0%	1.2%	1.6%	14	38	0	0.0%
Human Resources Managers	1,096	\$123,800	0.88	17	1.5%	58	1.1%	1.3%	1.8%	55	368	43	0.4%
Training and Development Managers	276	\$117,200	0.83	4	1.5%	10	0.7%	1.2%	1.6%	22	88	-1	0.0%
Farmers, Ranchers, and Other Agricultural Managers	4,019	\$58,200	0.51	20	0.5%	152	0.8%	0.2%	0.6%	10	2,413	-426	-1.1%
Construction Managers	3,116	\$107,100	0.85	52	1.6%	178	1.2%	1.2%	2.3%	60	682	25	0.1%
Education Administrators, Preschool and Childcare center/program	578	\$43,000	1.01	7	1.2%	6	0.2%	0.3%	1.1%	22	170	10	0.2%
Education Administrators, Elementary and Secondary School	2,232	\$98,100	1.05	23	1.0%	17	0.2%	0.5%	0.6%	14	670	29	0.1%
Education Administrators, Postsecondary	1,358	\$90,600	1.07	14	1.0%	68	1.0%	0.3%	0.6%	190	424	53	0.4%
Education Administrators, All Other	274	\$73,300	0.79	3	1.1%	-10	-0.7%	-0.2%	0.9%	14	88	-5	-0.2%
Architectural and Engineering Managers	1,545	\$144,800	0.96	30	1.9%	56	0.7%	2.2%	1.0%	69	430	-57	-0.4%
Food Service Managers	2,654	\$50,300	0.96	36	1.3%	179	1.4%	1.2%	2.2%	493	832	-3	0.0%
Funeral Service Managers	232	\$55,500	0.86	1	0.6%	-6	-0.5%	-0.8%	0.0%	6	154	-5	-0.2%
Gaming Managers	56	\$76,600	1.18	2	2.7%	-11	-3.7%	-1.9%	0.2%	2	9	-3	-0.5%
Lodging Managers	337	\$46,600	0.72	5	1.6%	18	1.1%	0.5%	1.8%	26	98	6	0.2%
Medical and Health Services Managers	3,109	\$107,100	0.97	56	1.7%	169	1.1%	1.0%	2.0%	538	814	279	0.9%
Natural Sciences Managers	471	\$118,900	0.93	7	1.5%	-60	-2.4%	0.0%	1.3%	58	101	-12	-0.3%
Postmasters and Mail Superintendents	99	\$74,800	0.78	2	1.6%	0	-0.1%	-0.3%	-0.3%	0	39	-32	-3.9%
Property, Real Estate, and Community Association Managers	2,781	\$47,900	0.95	31	1.1%	131	1.0%	0.8%	1.6%	142	907	223	0.8%
Social and Community Service Managers	1,076	\$61,400	0.83	33	2.9%	158	3.2%	3.2%	3.2%	5	296	68	0.6%
Emergency Management Directors	61	\$64,800	0.76	2	2.9%	0	0.1%	0.2%	0.8%	7	8	1	0.1%
Managers, All Other	7,663	\$106,900	0.85	41	0.5%	-16	0.0%	0.0%	0.7%	517	4,534	134	0.2%
Agents and Business Managers of Artists, Performers, and Athletes	106	\$30,500	0.48	4	3.7%	-17	-2.9%	-2.4%	4.1%	0	50	-5	-0.5%
Buyers and Purchasing Agents, Farm Products	98	\$65,500	0.80	2	2.1%	5	1.0%	0.2%	0.9%	4	24	0	0.0%
Wholesale and Retail Buyers, Except Farm Products	1,602	\$61,200	1.36	63	3.8%	109	1.4%	1.2%	1.9%	12	590	62	0.4%



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ST. LOUIS MSA

TITLE	CURRENT					HISTORICAL 2012-2017				FORECAST			
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS			
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS*	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND
Purchasing Agents, Except Wholesale, Retail, and Farm Products	2,972	\$71,800	1.08	110	3.6%	154	1.1%	1.4%	1.2%	103	818	-157	-0.5%
Claims Adjusters, Examiners, and Investigators	2,942	\$62,700	1.15	65	2.1%	283	2.0%	1.5%	1.7%	139	741	28	0.1%
Insurance Appraisers, Auto Damage	158	\$73,500	1.07	2	1.5%	10	1.3%	-0.1%	2.0%	20	55	-6	-0.4%
Compliance Officers	2,248	\$63,200	0.90	29	1.2%	59	0.5%	0.8%	1.2%	60	334	-31	-0.1%
Cost Estimators	2,515	\$69,100	1.24	82	3.2%	248	2.1%	2.7%	3.2%	52	692	78	0.3%
Human Resources Specialists	4,880	\$63,000	0.98	195	3.8%	294	1.3%	1.1%	1.9%	776	1,327	-94	-0.2%
Farm Labor Contractors	2	\$46,300	0.23	0	n/a	0	6.0%	0.6%	1.7%	0	0	0	0.2%
Labor Relations Specialists	1,110	\$65,000	1.52	37	3.2%	-159	-2.6%	-2.5%	-0.7%	8	279	-172	-1.7%
Logisticians	1,717	\$75,500	1.24	52	3.0%	121	1.5%	2.2%	1.4%	50	221	-81	-0.5%
Management Analysts	5,591	\$82,300	0.76	201	3.4%	358	1.3%	2.6%	1.9%	777	1,003	466	0.8%
Meeting, Convention, and Event Planners	1,032	\$53,600	0.96	36	3.4%	55	1.1%	1.2%	2.0%	33	132	40	0.4%
Fundraisers	826	\$53,600	1.11	25	3.0%	30	0.7%	0.9%	1.7%	8	121	28	0.3%
Compensation, Benefits, and Job Analysis Specialists	767	\$66,100	1.00	30	3.7%	25	0.7%	0.7%	0.6%	55	168	-12	-0.2%
Training and Development Specialists	2,717	\$63,400	1.07	71	2.5%	113	0.9%	1.3%	1.9%	154	685	14	0.1%
Market Research Analysts and Marketing Specialists	5,662	\$67,900	1.05	153	2.6%	475	1.8%	2.3%	2.4%	153	744	616	1.0%
Business Operations Specialists, All Other	8,560	\$72,700	0.96	287	3.2%	269	0.6%	1.2%	1.5%	342	989	-121	-0.1%
Accountants and Auditors	12,686	\$75,700	1.02	320	2.4%	704	1.1%	1.5%	1.7%	548	3,630	502	0.4%
Appraisers and Assessors of Real Estate	799	\$60,100	1.11	21	2.5%	90	2.4%	1.3%	1.8%	24	186	77	0.9%
Budget Analysts	442	\$72,900	0.85	18	3.8%	12	0.6%	0.8%	0.7%	34	103	-14	-0.3%
Credit Analysts	815	\$76,300	1.17	11	1.3%	20	0.5%	0.3%	1.3%	31	379	8	0.1%
Financial Analysts	2,798	\$94,600	1.01	51	1.8%	213	1.6%	1.5%	1.7%	255	606	72	0.3%
Personal Financial Advisors	3,116	\$107,300	1.33	34	1.1%	268	1.8%	0.9%	1.2%	85	1,049	692	2.0%
Insurance Underwriters	905	\$82,000	1.03	14	1.5%	34	0.8%	-0.4%	1.5%	33	218	-124	-1.5%
Financial Examiners	820	\$73,900	1.74	27	3.2%	58	1.5%	1.4%	1.0%	25	262	38	0.5%
Credit Counselors	411	\$54,800	1.34	8	2.0%	21	1.0%	0.9%	1.4%	4	68	27	0.6%
Loan Officers	3,452	\$86,000	1.22	82	2.3%	-77	-0.4%	-0.2%	1.3%	147	586	104	0.3%
Tax Examiners and Collectors, and Revenue Agents	217	\$70,600	0.41	13	4.4%	-32	-2.7%	-1.5%	-0.9%	19	90	-35	-1.8%
Tax Preparers	776	\$38,000	0.98	64	7.5%	41	1.1%	1.7%	1.1%	80	255	-34	-0.4%
Financial Specialists, All Other	1,251	\$82,800	1.08	62	4.7%	51	0.8%	1.0%	1.2%	99	116	-17	-0.1%
Computer and Information Research Scientists	149	\$89,200	0.55	5	3.1%	-11	-1.4%	1.7%	1.8%	108	17	3	0.2%
Computer Systems Analysts	6,395	\$93,700	1.15	172	2.6%	426	1.4%	2.6%	2.5%	308	881	826	1.2%
Information Security Analysts	1,437	\$89,100	1.52	27	1.9%	88	1.3%	2.4%	2.3%	411	179	124	0.8%
Computer Programmers	3,406	\$85,000	1.25	150	4.2%	302	1.9%	3.1%	2.9%	31	764	-450	-1.4%
Software Developers, Applications	6,858	\$99,200	0.88	110	1.6%	541	1.7%	3.2%	3.4%	915	1,103	761	1.1%
Software Developers, Systems Software	3,174	\$105,900	0.78	54	1.6%	247	1.6%	3.3%	2.4%	17	418	162	0.5%
Web Developers	1,236	\$67,900	0.84	43	3.3%	61	1.0%	1.6%	2.6%	461	216	251	1.9%
Database Administrators	1,277	\$91,300	1.15	27	2.0%	45	0.7%	1.5%	2.1%	242	268	49	0.4%
Network and Computer Systems Administrators	4,095	\$84,300	1.14	82	1.9%	238	1.2%	2.0%	2.0%	889	523	9	0.0%

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST				
	PAST 4 QUARTERS			Q2 2017	TOTAL	AVG ANNUAL CHANGE			CURRENT	NEXT TEN YEARS			
	EMPL	AVG. ANNUAL WAGES <sup>1</sup>	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE	EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	ONLINE JOB ADS <sup>2</sup>	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND	AVG. ANNUAL GROWTH %
Computer Network Architects	1,715	\$98,800	1.11	15	0.8%	88	1.1%	2.3%	2.1%	55	213	12	0.1%
Computer User Support Specialists	6,358	\$50,100	1.12	230	3.5%	376	1.2%	2.1%	2.3%	1,528	819	334	0.5%
Computer Network Support Specialists	2,426	\$60,900	1.37	90	3.6%	101	0.9%	1.6%	1.7%	5	314	-21	-0.1%
Computer Occupations, All Other	2,830	\$84,400	1.13	89	3.0%	99	0.7%	1.7%	1.6%	1,866	420	-19	-0.1%
Actuaries	175	\$93,000	0.89	0	n/a	18	2.2%	2.3%	1.3%	34	49	24	1.3%
Mathematicians	19	\$102,200	0.73	0	n/a	-3	-3.1%	-0.7%	-0.2%	0	3	3	1.4%
Operations Research Analysts	808	\$81,800	0.77	19	2.2%	45	1.1%	1.9%	2.0%	54	176	166	1.9%
Statisticians	376	\$77,800	1.08	4	1.0%	-2	-0.1%	1.2%	1.6%	51	72	96	2.3%
Mathematical Technicians	4	\$56,600	0.72	0	n/a	0	0.1%	0.5%	0.4%	0	1	0	0.5%
Mathematical Science Occupations, All Other	14	\$75,000	0.83	0	n/a	0	0.5%	2.6%	2.1%	0	3	1	0.5%
Architects, Except Landscape and Naval	1,084	\$82,400	0.93	18	1.6%	46	0.9%	3.1%	2.2%	55	223	61	0.5%
Landscape Architects	208	\$71,300	0.92	5	2.2%	11	1.1%	2.6%	2.2%	6	45	6	0.3%
Cartographers and Photogrammetrists	43	\$77,600	0.40	3	5.1%	2	1.0%	2.2%	1.6%	31	14	9	1.9%
Surveyors	391	\$61,300	0.94	15	3.7%	21	1.1%	2.2%	1.5%	14	120	-19	-0.5%
Aerospace Engineers	1,107	\$108,600	1.63	16	1.4%	105	2.0%	2.1%	0.3%	14	253	-141	-1.4%
Agricultural Engineers	13	\$75,000	0.68	0	n/a	1	1.0%	1.6%	0.8%	6	3	0	-0.1%
Biomedical Engineers	59	\$79,300	0.27	2	2.4%	-4	-1.1%	1.8%	1.0%	1	17	8	1.3%
Chemical Engineers	390	\$93,400	1.24	12	2.9%	10	0.5%	1.1%	0.8%	31	104	-31	-0.8%
Civil Engineers	2,454	\$81,800	0.91	48	1.9%	122	1.0%	1.7%	1.3%	52	708	85	0.3%
Computer Hardware Engineers	246	\$95,600	0.36	9	3.2%	-3	-0.2%	4.8%	1.4%	0	48	9	0.4%
Electrical Engineers	1,820	\$99,800	1.04	30	1.6%	9	0.1%	1.9%	0.8%	108	422	-71	-0.4%
Electronics Engineers, Except Computer	1,199	\$101,800	0.96	29	2.3%	-52	-0.8%	1.7%	0.0%	1	251	-89	-0.8%
Environmental Engineers	420	\$80,100	0.84	11	2.4%	22	1.1%	1.8%	1.4%	12	120	25	0.6%
Health and Safety Engineers, Except Mining Safety Engineers and Inspectors	264	\$96,600	1.09	8	2.9%	10	0.8%	1.5%	1.4%	20	77	-2	-0.1%
Industrial Engineers	2,764	\$91,600	1.17	63	2.2%	221	1.7%	2.4%	1.0%	77	843	-125	-0.5%
Marine Engineers and Naval Architects	55	\$96,800	0.57	1	1.0%	5	1.8%	3.6%	1.2%	0	17	2	0.3%
Materials Engineers	302	\$97,800	1.23	8	2.6%	-3	-0.2%	1.1%	0.4%	6	113	-13	-0.4%
Mechanical Engineers	2,302	\$89,200	0.88	24	1.0%	78	0.7%	1.7%	1.1%	186	772	2	0.0%
Mining and Geological Engineers, Including Mining Safety Engineers	39	\$99,900	0.58	1	3.0%	2	1.1%	0.7%	-1.5%	1	10	0	0.1%
Nuclear Engineers	78	\$102,700	0.46	1	1.6%	-11	-2.7%	-1.2%	-0.6%	4	16	-4	-0.5%
Petroleum Engineers	191	\$142,500	0.60	3	1.7%	9	1.0%	1.6%	-1.0%	0	43	-6	-0.3%
Engineers, All Other	973	\$78,300	0.81	21	2.1%	35	0.7%	1.5%	0.8%	101	205	-31	-0.3%
Architectural and Civil Drafters	995	\$50,900	1.08	67	6.3%	68	1.4%	2.9%	2.3%	13	125	-64	-0.7%
Electrical and Electronics Drafters	264	\$62,400	1.00	20	7.1%	13	1.0%	2.0%	1.2%	5	31	-5	-0.2%
Mechanical Drafters	579	\$55,100	0.97	35	5.7%	42	1.5%	1.7%	1.2%	93	97	-73	-1.3%
Drafters, All Other	113	\$50,800	0.75	7	6.1%	7	1.3%	2.0%	2.0%	2	11	-10	-0.9%
Aerospace Engineering and Operations Technicians	179	\$68,900	1.54	4	2.5%	11	1.3%	1.8%	0.3%	10	51	-12	-0.7%
Civil Engineering Technicians	577	\$48,800	0.88	27	4.5%	21	0.7%	1.1%	0.8%	6	142	-2	0.0%

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST				
	PAST 4 QUARTERS		Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS				
	EMPL	AVG. ANNUAL WAGES <sup>1</sup>	LOCATION QUOTIENT	UNEMPL		UNEMPL RATE	EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS <sup>2</sup>	TOTAL REPL DEMAND	TOTAL ANNUAL GROWTH %
Electrical and Electronic Engineering Technicians	703	\$59,000	0.57	24	3.2%	-7	-0.2%	3.0%	0.2%	11	158	-52	-0.8%
Electro-Mechanical Technicians	108	\$56100	0.81	3	2.8%	2	0.4%	3.0%	0.2%	9	22	-6	-0.6%
Environmental Engineering Technicians	128	\$41,400	0.83	5	3.9%	7	1.1%	2.9%	1.7%	6	28	6	0.4%
Industrial Engineering Technicians	671	\$68,200	1.20	19	2.8%	32	1.0%	2.3%	0.8%	2	178	-60	-0.9%
Mechanical Engineering Technicians	394	\$53,900	0.92	12	2.8%	12	0.6%	1.8%	1.1%	3	94	-15	-0.4%
Engineering Technicians, Except Drafters, All Other	558	\$59100	0.84	22	3.7%	-3	-0.1%	1.2%	0.8%	35	137	-35	-0.6%
Surveying and Mapping Technicians	475	\$41,500	0.90	36	7.1%	24	1.0%	2.2%	1.3%	20	57	-50	-1.1%
Animal Scientists	19	\$61,100	0.67	1	3.4%	0	-0.2%	1.4%	1.5%	7	8	0	-0.1%
Food Scientists and Technologists	110	\$66,400	0.75	5	3.8%	0	0.0%	0.8%	2.1%	9	34	-3	-0.3%
Soil and Plant Scientists	129	\$64,700	0.87	7	5.0%	-9	-1.3%	0.6%	1.5%	5	53	1	0.1%
Biochemists and Biophysicists	270	\$87,300	0.89	5	1.8%	-49	-3.3%	-0.5%	1.6%	11	80	2	0.1%
Microbiologists	166	\$65,800	0.79	4	2.0%	-14	-1.6%	0.3%	1.4%	7	49	-4	-0.2%
Zoologists and Wildlife Biologists	102	\$61,000	0.62	4	3.0%	-8	-1.5%	-0.3%	0.7%	4	28	-2	-0.2%
Biological Scientists, All Other	158	\$85,000	0.50	4	2.4%	-22	-2.5%	0.2%	0.8%	32	46	-7	-0.5%
Conservation Scientists	118	\$49,600	0.63	2	1.2%	-7	-1.1%	-0.6%	0.4%	6	50	0	0.0%
Foresters	36	\$50,600	0.39	0	n/a	-1	-0.6%	-0.1%	0.1%	0	20	0	0.0%
Epidemiologists	42	\$66100	0.76	1	1.4%	-2	-1.1%	-0.3%	1.0%	2	14	1	0.2%
Medical Scientists, Except Epidemiologists	1,343	\$55,700	1.20	12	0.8%	-208	-2.8%	-0.7%	1.7%	180	417	45	0.3%
Life Scientists, All Other	60	\$90,900	0.75	2	2.6%	2	0.7%	0.7%	1.4%	6	19	1	0.2%
Astronomers	11	\$92,600	0.58	0	n/a	-3	-5.3%	-1.1%	0.8%	5	2	0	-0.3%
Physicists	124	\$102,100	0.76	6	4.1%	-24	-3.5%	-0.5%	1.0%	0	21	3	0.2%
Atmospheric and Space Scientists	66	\$79,600	0.73	1	2.1%	-6	-1.7%	1.1%	1.5%	0	13	1	0.2%
Chemists	941	\$74,700	1.17	20	2.1%	-9	-0.2%	0.9%	1.2%	84	202	-70	-0.8%
Materials Scientists	76	\$85,700	0.98	1	1.5%	-6	-1.5%	1.0%	1.3%	0	14	-3	-0.5%
Environmental Scientists and Specialists, Including Health	447	\$55,200	0.56	11	2.2%	15	0.7%	1.7%	1.5%	23	141	21	0.5%
Geoscientists, Except Hydrologists and Geographers	111	\$62,500	0.38	2	1.7%	5	1.0%	2.3%	0.5%	1	32	4	0.4%
Hydrologists	41	\$70,200	0.69	1	2.1%	1	0.4%	1.6%	1.3%	0	12	1	0.2%
Physical Scientists, All Other	113	\$82,600	0.55	3	2.7%	-14	-2.3%	-0.4%	0.2%	31	10	-7	-0.6%
Economists	165	\$94,700	0.74	2	1.3%	20	2.6%	3.2%	1.2%	3	54	-1	-0.1%
Survey Researchers	105	\$48,200	0.81	8	6.7%	37	9.0%	6.4%	2.4%	27	11	1	0.1%
Clinical, Counseling, and School Psychologists	1,165	\$67,500	0.82	16	1.3%	64	1.1%	1.2%	2.0%	28	368	180	1.4%
Industrial-Organizational Psychologists	14	\$87,700	0.78	0	n/a	1	2.2%	3.0%	1.1%	2	5	1	0.9%
Psychologists, All Other	110	\$79,500	0.72	2	2.0%	1	0.1%	0.7%	1.5%	3	35	9	0.8%
Sociologists	19	\$72,800	0.61	0	n/a	5	5.9%	3.4%	1.2%	4	2	-1	-0.3%
Urban and Regional Planners	122	\$70,500	0.40	6	4.0%	2	0.4%	0.8%	0.9%	3	21	1	0.1%
Anthropologists and Archeologists	42	\$55,500	0.71	3	6.5%	9	5.2%	4.8%	1.3%	2	5	-1	-0.1%
Geographers	8	\$62,100	0.72	1	7.8%	0	-1.1%	0.5%	0.7%	11	1	-1	-0.6%
Historians	20	\$51,200	0.72	2	8.0%	2	1.7%	1.3%	0.8%	5	2	-1	-0.3%



## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	PAST 4 QUARTERS				CURRENT				HISTORICAL 2012-2017				FORECAST			
	EMPL		AVG. ANNUAL WAGES¹		LOCATION QUOTIENT	Q2 2017		UNEMPL RATE	TOTAL EMPL	AVG ANNUAL CHANGE			CURRENT ONLINE JOB ADS²	NEXT TEN YEARS		
	EMPL	AVG. ANNUAL WAGES¹	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE	ST. LOUIS, MO-IL MSA	MISSOURI	USA	EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	ONLINE JOB ADS²	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND	AVG. ANNUAL GROWTH %
Political Scientists	38	\$94,200	0.51	2	4.9%	2.3%	2.1%	0.6%	4	2.3%	2.1%	0.6%	1	4	-4	-1.0%
Social Scientists and Related Workers, All Other	225	\$67,800	0.67	15	6.2%	1.0%	1.2%	0.7%	11	1.0%	1.2%	0.7%	1	28	-12	-0.5%
Agricultural and Food Science Technicians	177	\$57,600	0.65	6	2.9%	0.0%	0.7%	1.3%	0	0.0%	0.7%	1.3%	114	72	-5	-0.3%
Biological Technicians	597	\$38,800	0.85	36	5.6%	-2.8%	0.0%	1.6%	-91	-2.8%	0.0%	1.6%	12	156	-2	0.0%
Chemical Technicians	689	\$48,700	1.11	19	2.7%	-0.2%	0.9%	0.9%	-6	-0.2%	0.9%	0.9%	8	200	-54	-0.8%
Geological and Petroleum Technicians	69	\$52,200	0.47	2	3.2%	0.9%	1.9%	-1.8%	3	0.9%	1.9%	-1.8%	1	25	1	0.1%
Nuclear Technicians	25	\$65,300	0.35	1	3.8%	-0.4%	-1.5%	-0.9%	-1	-0.4%	-1.5%	-0.9%	4	8	-1	-0.4%
Social Science Research Assistants	168	\$42,700	0.54	8	4.4%	4.0%	2.8%	1.4%	30	4.0%	2.8%	1.4%	1	71	1	0.0%
Environmental Science and Protection Technicians, Including Health	196	\$40,000	0.64	12	5.6%	0.8%	2.7%	1.7%	8	0.8%	2.7%	1.7%	10	86	9	0.4%
Forensic Science Technicians	83	\$57,800	0.59	8	7.8%	-0.4%	-0.3%	0.7%	-2	-0.4%	-0.3%	0.7%	2	42	16	1.8%
Forest and Conservation Technicians	55	\$49,700	0.18	6	7.8%	-1.6%	-0.3%	-0.4%	-5	-1.6%	-0.3%	-0.4%	15	23	-7	-1.4%
Life, Physical, and Social Science Technicians, All Other	973	\$43,800	1.47	46	4.6%	0.8%	1.3%	1.3%	37	0.8%	1.3%	1.3%	135	487	18	0.2%
Substance Abuse and Behavioral Disorder Counselors	877	\$39,000	0.93	9	1.0%	2.4%	2.2%	2.3%	99	2.4%	2.2%	2.3%	17	202	169	1.8%
Educational, Guidance, School, and Vocational Counselors	2,390	\$49,800	1.00	22	0.9%	0.2%	0.2%	0.8%	22	0.2%	0.2%	0.8%	39	518	70	0.3%
Marriage and Family Therapists	293	\$47,400	0.70	3	1.0%	2.0%	1.9%	2.6%	28	2.0%	1.9%	2.6%	5	56	49	1.6%
Mental Health Counselors	1,422	\$42,100	0.99	15	1.0%	2.3%	2.3%	2.3%	151	2.3%	2.3%	2.3%	101	325	239	1.6%
Rehabilitation Counselors	1,265	\$39,800	1.18	18	1.4%	3.8%	3.4%	3.2%	216	3.8%	3.4%	3.2%	4	273	44	0.3%
Counselors, All Other	129	\$35,100	0.42	2	1.2%	0.8%	0.9%	1.6%	5	0.8%	0.9%	1.6%	9	28	11	0.8%
Child, Family, and School Social Workers	2,890	\$39,500	1.05	33	1.1%	1.4%	1.4%	1.7%	188	1.4%	1.4%	1.7%	106	715	160	0.5%
Healthcare Social Workers	1,830	\$48,400	1.18	13	0.7%	3.3%	3.1%	3.5%	276	3.3%	3.1%	3.5%	26	454	215	1.1%
Mental Health and Substance Abuse Social Workers	1,050	\$38,900	0.93	9	0.8%	2.6%	2.5%	2.8%	126	2.6%	2.5%	2.8%	155	255	161	1.4%
Social Workers, All Other	467	\$52,600	0.87	7	1.3%	1.0%	1.0%	1.6%	22	1.0%	1.0%	1.6%	0	117	-2	-0.1%
Health Educators	535	\$45,300	0.98	5	0.9%	1.5%	1.1%	2.2%	38	1.5%	1.1%	2.2%	12	103	39	0.7%
Probation Officers and Correctional Treatment Specialists	755	\$41,400	1.03	18	2.1%	-0.5%	-0.9%	0.4%	-20	-0.5%	-0.9%	0.4%	6	158	-13	-0.2%
Social and Human Service Assistants	2,885	\$29,800	0.85	59	2.0%	3.5%	3.7%	3.4%	452	3.5%	3.7%	3.4%	390	549	242	0.8%
Community Health Workers	603	\$38,800	1.14	12	2.0%	2.7%	2.8%	3.0%	75	2.7%	2.8%	3.0%	3	147	65	1.0%
Community and Social Service Specialists, All Other	675	\$43,300	0.73	18	2.5%	2.1%	2.1%	2.4%	68	2.1%	2.1%	2.4%	4	123	38	0.5%
Clergy	2,297	\$43,600	1.17	3	0.1%	-0.8%	-0.2%	0.3%	-100	-0.8%	-0.2%	0.3%	29	482	-18	-0.1%
Directors, Religious Activities and Education	1,555	\$35,700	1.29	1	0.0%	-1.0%	-0.3%	0.2%	-81	-1.0%	-0.3%	0.2%	16	395	-31	-0.2%
Religious Workers, All Other	873	\$31,400	1.90	1	0.1%	-1.0%	-0.4%	0.3%	-44	-1.0%	-0.4%	0.3%	0	137	-15	-0.2%
Lawyers	6,880	\$118,200	0.96	28	0.4%	0.2%	0.3%	0.4%	63	0.2%	0.3%	0.4%	67	1,255	23	0.0%
Judicial Law Clerks	54	\$52,600	0.46	4	5.8%	-0.6%	-1.0%	0.2%	-2	-0.6%	-1.0%	0.2%	4	12	-6	-1.3%
Administrative Law Judges, Adjudicators, and Hearing Officers	99	\$108,700	0.75	1	0.5%	-1.4%	-1.1%	-0.2%	-7	-1.4%	-1.1%	-0.2%	0	15	-12	-1.3%
Arbitrators, Mediators, and Conciliators	74	\$49,500	1.06	0	n/a	2.7%	2.1%	1.6%	9	2.7%	2.1%	1.6%	0	12	4	0.6%
Judges, Magistrate Judges, and Magistrates	156	\$125,900	0.66	1	0.5%	-0.6%	-0.9%	0.2%	-5	-0.6%	-0.9%	0.2%	0	23	-8	-0.5%
Paralegals and Legal Assistants	2,575	\$50,000	1.01	35	1.3%	0.3%	0.4%	0.4%	45	0.3%	0.4%	0.4%	141	540	34	0.1%
Court Reporters	120	\$59,900	0.66	3	2.4%	-1.6%	-2.8%	0.0%	-10	-1.6%	-2.8%	0.0%	2	29	15	1.2%
Title Examiners, Abstractors, and Searchers	593	\$45,200	0.92	5	0.8%	0.1%	-0.4%	0.6%	2	0.1%	-0.4%	0.6%	14	167	-36	-0.6%

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT					HISTORICAL 2012-2017					FORECAST				
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS					
	EMPL	AVG. ANNUAL WAGES <sup>s</sup>	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS <sup>e</sup>	TOTAL REPL. DEMAND	TOTAL ANNUAL GROWTH %		
Legal Support Workers, All Other	380	\$53,600	0.80	7	1.8%	-7	-0.4%	-0.2%	0.2%	5	83	-21	-0.6%		
Business Teachers, Postsecondary	643	\$76,400	0.89	14	2.1%	10	0.3%	-0.1%	0.3%	72	112	31	0.5%		
Computer Science Teachers, Postsecondary	264	\$71,400	0.91	6	2.1%	-10	-0.8%	-0.5%	0.2%	13	47	11	0.4%		
Mathematical Science Teachers, Postsecondary	310	\$76,900	0.68	7	2.0%	-25	-1.5%	-0.5%	0.3%	9	55	37	1.1%		
Architecture Teachers, Postsecondary	66	\$88,200	0.93	1	1.8%	5	1.6%	0.6%	0.8%	4	11	5	0.7%		
Engineering Teachers, Postsecondary	246	\$94,700	0.70	5	1.8%	11	0.9%	0.3%	0.6%	1	46	23	0.9%		
Agricultural Sciences Teachers, Postsecondary	55	\$91,800	0.54	1	1.8%	1	0.3%	0.3%	0.7%	8	9	2	0.3%		
Biological Science Teachers, Postsecondary	466	\$101,800	1.03	10	2.1%	-1	0.0%	0.0%	0.6%	16	83	53	1.1%		
Forestry and Conservation Science Teachers, Postsecondary	9	\$85,900	0.54	0	n/a	1	1.3%	0.5%	0.6%	1	1	0	0.2%		
Atmospheric, Earth, Marine, and Space Sciences Teachers, Postsecondary	87	\$91,100	0.87	2	1.9%	-2	-0.4%	-0.1%	0.5%	2	15	5	0.5%		
Chemistry Teachers, Postsecondary	167	\$92,400	0.87	3	2.0%	3	0.3%	0.2%	0.6%	7	31	18	1.0%		
Environmental Science Teachers, Postsecondary	41	\$84,400	0.78	1	1.8%	2	1.0%	0.4%	0.7%	1	8	2	0.5%		
Physics Teachers, Postsecondary	96	\$72,600	0.73	2	2.0%	3	0.7%	0.3%	0.7%	2	17	10	1.0%		
Anthropology and Archeology Teachers, Postsecondary	38	\$70,700	0.70	1	2.0%	1	0.5%	0.2%	0.9%	0	7	2	0.5%		
Area, Ethnic, and Cultural Studies Teachers, Postsecondary	78	\$80,300	0.90	2	1.9%	5	1.3%	0.5%	0.8%	5	12	8	1.0%		
Economics Teachers, Postsecondary	91	\$91,200	0.76	2	2.1%	5	1.1%	0.4%	0.7%	1	16	5	0.5%		
Geography Teachers, Postsecondary	26	\$80,400	0.67	1	2.1%	0	-0.3%	0.0%	0.5%	0	5	2	0.6%		
Political Science Teachers, Postsecondary	119	\$80,900	0.75	2	1.9%	6	1.0%	0.5%	0.7%	3	21	6	0.5%		
Psychology Teachers, Postsecondary	303	\$76,800	0.90	6	2.0%	7	0.5%	0.2%	0.7%	10	53	34	1.1%		
Sociology Teachers, Postsecondary	48	\$64,900	0.37	1	2.3%	0	-0.1%	-0.1%	0.5%	0	9	5	1.0%		
Social Sciences Teachers, Postsecondary, All Other	107	\$53,000	0.82	2	1.5%	-11	-2.0%	-0.8%	0.3%	0	20	13	1.1%		
Health Specialties Teachers, Postsecondary	2,901	\$163,900	1.72	53	1.8%	135	1.0%	0.4%	0.7%	142	510	421	1.4%		
Nursing Instructors and Teachers, Postsecondary	517	\$73,000	1.03	11	2.0%	-13	-0.5%	-0.6%	0.0%	8	83	68	1.2%		
Education Teachers, Postsecondary	569	\$55,700	1.08	12	2.0%	30	1.1%	0.4%	0.7%	1	92	28	0.5%		
Library Science Teachers, Postsecondary	33	\$68,700	0.71	1	1.7%	1	0.4%	0.3%	0.7%	3	6	1	0.4%		
Criminal Justice and Law Enforcement Teachers, Postsecondary	129	\$72,100	0.96	3	1.9%	-12	-1.7%	-1.3%	0.1%	2	25	19	1.4%		
Law Teachers, Postsecondary	175	\$127,700	1.11	3	1.8%	18	2.2%	1.1%	0.9%	1	32	29	1.5%		
Social Work Teachers, Postsecondary	95	\$57,000	0.85	2	1.8%	4	1.0%	0.4%	0.8%	1	18	10	1.0%		
Art, Drama, and Music Teachers, Postsecondary	838	\$75,800	0.96	18	2.0%	21	0.5%	0.3%	0.9%	73	150	51	0.6%		
Communications Teachers, Postsecondary	199	\$64,900	0.79	4	2.1%	-4	-0.4%	-0.1%	0.6%	3	34	11	0.6%		
English Language and Literature Teachers, Postsecondary	528	\$62,400	0.82	11	2.0%	-29	-1.1%	-0.5%	0.4%	8	95	31	0.6%		
Foreign Language and Literature Teachers, Postsecondary	193	\$56,400	0.73	4	2.1%	2	0.2%	0.2%	1.0%	5	34	12	0.6%		
History Teachers, Postsecondary	166	\$68,700	0.86	4	2.2%	2	0.2%	0.1%	0.5%	1	29	9	0.5%		
Philosophy and Religion Teachers, Postsecondary	278	\$46,600	1.37	6	2.1%	23	1.8%	0.9%	0.7%	4	46	17	0.6%		
Graduate Teaching Assistants	1,105	\$36,200	0.86	21	1.8%	85	1.6%	0.8%	0.8%	3	198	13	0.1%		
Home Economics Teachers, Postsecondary	19	\$69,100	0.66	0	n/a	-1	-1.5%	-0.4%	0.5%	1	2	-3	-1.8%		
Recreation and Fitness Studies Teachers, Postsecondary	71	\$62,700	0.44	2	2.0%	-4	-1.1%	-0.3%	0.6%	11	12	4	0.6%		
Vocational Education Teachers, Postsecondary	1,283	\$52,600	1.26	27	2.1%	-158	-2.3%	-2.4%	-1.6%	37	219	7	0.1%		

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST			
	PAST 4 QUARTERS		Q2 2017		TOTAL	AVG ANNUAL CHANGE			CURRENT ONLINE JOB ADS*	NEXT TEN YEARS		
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL		ST. LOUIS, MO-IL MSA	MISSOURI	USA		TOTAL REPL DEMAND	TOTAL GROWTH DEMAND	AVG. ANNUAL GROWTH %
Postsecondary Teachers, All Other	1,671	\$70,300	1.03	36	2.0%	-50	-0.6%	0.4%	6	267	88	0.5%
Preschool Teachers, Except Special Education	4,318	\$28,900	1.06	120	2.7%	88	0.4%	1.3%	247	1,200	71	0.2%
Kindergarten Teachers, Except Special Education	1,026	\$51,500	0.76	22	2.1%	8	0.2%	0.4%	6	286	14	0.1%
Elementary School Teachers, Except Special Education	12,200	\$57,500	1.01	253	2.0%	82	0.1%	0.4%	41	2,550	157	0.1%
Middle School Teachers, Except Special and Career/Technical Education	5,282	\$59,000	0.97	114	2.1%	43	0.2%	0.4%	47	1,131	72	0.1%
Career/Technical Education Teachers, Middle School	102	\$57,300	0.91	2	2.2%	1	0.2%	0.4%	1	16	1	0.1%
Secondary School Teachers, Except Special and Career/Technical Education	8,513	\$55,000	0.98	100	1.1%	62	0.1%	0.4%	51	1,991	112	0.1%
Career/Technical Education Teachers, Secondary School	551	\$61,600	0.79	7	1.2%	2	0.1%	0.2%	2	117	-21	-0.4%
Special Education Teachers, Preschool	261	\$36,300	0.93	5	1.7%	32	2.6%	2.9%	9	54	14	0.5%
Special Education Teachers, Kindergarten and Elementary School	1,113	\$48,700	0.68	21	1.7%	14	0.3%	0.4%	7	209	21	0.2%
Special Education Teachers, Middle School	584	\$59,100	0.73	10	1.6%	3	0.1%	0.3%	6	106	8	0.1%
Special Education Teachers, Secondary School	1,055	\$68,900	0.91	18	1.6%	12	0.2%	0.5%	14	201	18	0.2%
Special Education Teachers, All Other	86	\$47,100	0.23	2	1.8%	3	0.7%	1.3%	14	16	2	0.2%
Adult Basic and Secondary Education and Literacy Teachers and Instructors	319	\$45,900	0.52	14	3.9%	-22	-1.3%	-0.2%	10	64	4	0.1%
Self-Enrichment Education Teachers	3,093	\$39,800	0.94	65	2.0%	-51	-0.3%	0.6%	49	782	359	1.1%
Substitute Teachers	4,300	\$26,500	0.81	143	3.1%	71	0.3%	0.6%	36	897	91	0.2%
Teachers and Instructors, All Other	3,652	\$33,600	1.06	93	2.5%	-66	-0.4%	0.2%	178	736	148	0.4%
Archivists	61	\$55,000	0.91	2	2.4%	0	0.1%	0.1%	0	20	1	0.2%
Curators	106	\$65,800	0.82	3	2.8%	-1	-0.2%	1.4%	1	38	3	0.3%
Museum Technicians and Conservators	696	\$37,100	5.27	19	2.7%	-9	-0.2%	0.6%	3	216	11	0.2%
Librarians	997	\$60,200	0.89	19	1.8%	11	0.2%	0.3%	10	170	-39	-0.4%
Library Technicians	775	\$41,500	0.97	57	6.8%	11	0.3%	0.2%	4	340	-3	0.0%
Audio-Visual and Multimedia Collections Specialists	75	\$65,500	0.74	2	2.6%	1	0.1%	0.3%	3	9	2	0.3%
Farm and Home Management Advisors	40	\$49,500	0.50	2	4.1%	3	1.5%	1.0%	0	3	3	0.7%
Instructional Coordinators	1,124	\$54,700	0.81	38	3.1%	-16	-0.3%	0.2%	36	109	13	0.1%
Teacher Assistants	9,895	\$26,900	0.89	364	3.5%	137	0.3%	0.5%	68	2,315	172	0.2%
Education, Training, and Library Workers, All Other	670	\$37,000	0.69	25	3.5%	-28	-0.8%	-0.2%	0	70	23	0.3%
Art Directors	703	\$118,900	0.96	15	2.1%	11	0.3%	-0.1%	13	297	-16	-0.2%
Craft Artists	77	\$27,500	0.79	2	1.9%	3	0.7%	0.5%	0	31	-2	-0.3%
Fine Artists, Including Painters, Sculptors, and Illustrators	200	\$35,900	0.84	5	2.3%	6	0.6%	0.5%	0	75	-4	-0.2%
Multimedia Artists and Animators	449	\$65,700	0.72	9	2.0%	20	0.9%	1.0%	5	172	5	0.1%
Artists and Related Workers, All Other	94	\$53,200	0.81	4	3.7%	1	0.1%	0.2%	8	35	-3	-0.3%
Commercial and Industrial Designers	364	\$62,600	0.94	10	2.6%	29	1.7%	1.4%	8	110	-8	-0.2%
Fashion Designers	146	\$69,600	0.60	3	2.3%	8	1.2%	1.0%	1	55	-9	-0.6%
Floral Designers	603	\$28,100	1.16	26	4.1%	-70	-2.2%	-1.3%	8	257	-63	-1.1%
Graphic Designers	2,594	\$52,600	1.03	76	2.8%	109	0.9%	0.4%	100	777	-129	-0.5%
Interior Designers	758	\$61,000	1.21	22	2.9%	89	2.5%	2.2%	18	239	-5	-0.1%



## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT					HISTORICAL 2012-2017				FORECAST			
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS			
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS*	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND
Merchandise Displayers and Window Trimmers	1535	\$28,000	1.18	47	3.0%	-112	-1.4%	-1.8%	0.6%	118	552	-71	-0.5%
Set and Exhibit Designers	107	\$52,200	0.74	2	2.3%	9	1.8%	1.5%	2.3%	0	38	0	0.0%
Designers, All Other	97	\$53,700	1.10	3	3.3%	9	1.9%	0.9%	1.7%	0	25	-3	-0.3%
Actors	348	\$44,300	0.61	82	19.1%	41	2.5%	1.8%	2.5%	4	132	1	0.0%
Producers and Directors	796	\$63,100	0.60	27	3.2%	38	1.0%	0.7%	1.9%	28	347	-18	-0.2%
Athletes and Sports Competitors	138	\$40,500	1.21	6	4.1%	-1	-0.1%	0.7%	1.7%	0	49	0	0.0%
Coaches and Scouts	2,162	\$30,500	0.94	74	3.3%	59	0.6%	0.9%	1.9%	80	778	19	0.1%
Umpires, Referees, and Other Sports Officials	373	\$26,400	1.93	21	5.4%	7	0.4%	0.6%	1.5%	13	150	-2	0.0%
Dancers	110	\$29,700	0.92	8	7.2%	-20	-3.4%	-2.0%	1.2%	1	40	-1	-0.1%
Choreographers	46	\$48,800	0.78	3	6.5%	-5	-2.1%	-0.4%	3.3%	3	12	1	0.2%
Music Directors and Composers	596	\$46,300	0.89	11	1.8%	-29	-0.9%	-0.3%	0.4%	6	228	-12	-0.2%
Musicians and Singers	1,646	\$54,500	1.04	27	1.6%	-88	-1.0%	-0.3%	1.1%	1	738	-28	-0.2%
Entertainers and Performers, Sports and Related Workers, All Other	211	\$47,100	0.82	6	2.8%	4	0.4%	0.5%	1.3%	28	114	2	0.1%
Radio and Television Announcers	326	\$42,000	0.88	10	2.8%	-40	-2.3%	-2.0%	-0.8%	16	120	-73	-2.5%
Public Address System and Other Announcers	112	\$42,400	1.08	5	4.5%	-3	-0.5%	-0.7%	1.0%	3	38	-3	-0.3%
Broadcast News Analysts	43	\$71,200	0.76	0	n/a	-2	-0.8%	-0.8%	1.0%	3	13	-7	-1.9%
Reporters and Correspondents	291	\$35,500	0.66	8	2.6%	-53	-3.3%	-4.4%	-2.3%	10	149	-51	-1.9%
Public Relations Specialists	2,288	\$62,200	0.98	49	2.1%	120	1.1%	1.3%	1.7%	115	282	-3	0.0%
Editors	703	\$63,100	0.65	28	3.7%	-130	-3.3%	-4.9%	-1.3%	25	291	-117	-1.8%
Technical Writers	518	\$69,400	1.02	48	8.4%	25	1.0%	2.1%	2.0%	80	123	10	0.2%
Writers and Authors	1,037	\$59,300	0.82	17	1.6%	8	0.2%	0.1%	1.1%	18	501	-10	-0.1%
Interpreters and Translators	506	\$46,700	0.86	22	4.2%	95	4.2%	3.3%	2.0%	16	83	105	1.9%
Media and Communication Workers, All Other	213	\$53,500	0.72	7	3.3%	12	1.2%	1.0%	2.1%	1	48	7	0.3%
Audio and Video Equipment Technicians	672	\$42,100	0.88	25	3.6%	23	0.7%	0.5%	1.7%	28	144	34	0.5%
Broadcast Technicians	236	\$37,600	0.77	5	2.1%	-10	-0.8%	-0.8%	0.4%	6	38	-35	-1.6%
Radio Operators	5	\$42,600	0.63	1	10.4%	0	-1.2%	-1.1%	-0.3%	1	1	0	-0.7%
Sound Engineering Technicians	106	\$58,000	0.67	4	3.2%	5	1.0%	0.6%	1.7%	0	22	0	0.0%
Photographers	1,083	\$49,500	0.96	28	2.5%	-31	-0.6%	-1.0%	0.0%	19	552	-141	-1.4%
Camera Operators, Television, Video, and Motion Picture	148	\$48,600	0.57	5	3.3%	5	0.6%	0.2%	1.8%	8	19	-9	-0.7%
Film and Video Editors	187	\$56,700	0.50	6	3.1%	16	1.8%	1.2%	2.6%	10	27	14	0.7%
Media and Communication Equipment Workers, All Other	98	\$76,700	0.55	7	6.5%	4	0.9%	0.7%	1.7%	1	25	-10	-1.0%
Chiropractors	522	\$55,000	1.17	2	0.4%	39	1.6%	0.6%	1.1%	3	142	79	1.4%
Dentists, General	1,159	\$169,600	0.92	2	0.2%	59	1.1%	0.8%	1.7%	31	308	176	1.4%
Oral and Maxillofacial Surgeons	57	\$212,600	0.85	0	n/a	2	0.9%	0.7%	1.6%	3	15	7	1.2%
Orthodontists	57	\$208,900	0.84	0	n/a	3	0.9%	0.7%	1.5%	1	17	10	1.6%
Prosthodontists	8	\$153,500	0.90	0	n/a	0	1.2%	1.1%	1.7%	1	5	1	1.5%
Dentists, All Other Specialists	47	\$214,700	0.89	0	n/a	0	-0.1%	0.2%	0.6%	2	12	3	0.6%
Dietitians and Nutritionists	575	\$51,300	0.93	11	1.8%	24	0.8%	0.7%	2.2%	26	45	51	0.8%

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST			
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS		
	EMPL	AVG. ANNUAL WAGES¹	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS²	TOTAL REPL DEMAND	AVG. ANNUAL GROWTH %
Optometrists	405	\$106,600	1.00	1	0.1%	7	0.3%	1.0%	2.3%	9	190	79
Pharmacists	3,139	\$117,500	1.10	54	1.6%	175	1.2%	0.8%	1.2%	81	703	-94
Anesthesiologists	290	\$246,100	0.92	1	0.4%	6	0.4%	0.6%	1.4%	3	81	42
Family and General Practitioners	1,929	\$153,700	1.53	7	0.4%	55	0.6%	0.5%	1.5%	25	608	58
Internists, General	162	\$268,400	0.33	1	0.4%	1	0.1%	0.4%	1.6%	17	49	8
Obstetricians and Gynecologists	193	\$147,200	0.89	1	0.4%	4	0.4%	0.5%	1.6%	12	59	22
Pediatricians, General	270	\$231,700	0.88	1	0.4%	5	0.4%	0.5%	1.5%	17	76	11
Psychiatrists	147	\$236,600	0.56	1	0.4%	5	0.6%	0.8%	1.7%	22	43	13
Surgeons	414	\$216,600	0.94	2	0.4%	9	0.4%	0.6%	1.5%	30	112	54
Physicians and Surgeons, All Other	3,072	\$203,500	0.89	11	0.4%	45	0.3%	0.5%	1.3%	208	851	271
Physician Assistants	647	\$94,900	0.65	4	0.5%	25	0.8%	0.7%	1.9%	26	147	141
Podiatrists	78	\$192,600	0.79	1	0.9%	4	1.1%	-0.3%	3.5%	1	15	9
Occupational Therapists	1,258	\$69,400	1.12	7	0.6%	115	1.9%	1.5%	2.4%	68	247	255
Physical Therapists	2,159	\$78,300	1.03	13	0.6%	217	2.1%	1.3%	2.7%	103	600	597
Radiation Therapists	204	\$80,400	1.24	1	0.6%	6	0.6%	0.7%	1.6%	6	39	12
Recreational Therapists	225	\$40,700	1.27	2	0.8%	10	0.9%	0.8%	1.5%	11	47	9
Respiratory Therapists	1,323	\$54,300	1.12	10	0.7%	29	0.5%	0.6%	1.2%	49	294	67
Speech-Language Pathologists	1,477	\$68,800	1.13	13	0.9%	107	1.5%	1.2%	1.9%	67	410	297
Exercise Physiologists	106	\$55,900	0.78	0	n/a	1	0.2%	0.0%	0.9%	2	25	10
Therapists, All Other	139	\$53,000	0.60	1	0.8%	5	0.8%	0.6%	1.6%	0	28	48
Veterinarians	722	\$94,300	0.94	3	0.4%	104	3.2%	2.1%	3.1%	20	142	23
Registered Nurses	33,418	\$62,800	1.25	307	0.9%	1,351	0.8%	0.8%	1.7%	1,072	7,603	2,619
Nurse Anesthetists	423	\$151,900	1.08	4	0.9%	13	0.6%	0.6%	1.8%	7	103	54
Nurse Midwives	61	\$74,100	0.96	1	1.4%	3	0.9%	0.5%	2.5%	2	12	11
Nurse Practitioners	1,751	\$92,200	1.22	9	0.5%	85	1.0%	0.8%	2.0%	87	463	456
Audiologists	133	\$79,000	1.10	2	1.7%	13	2.1%	1.3%	2.4%	6	32	34
Health Diagnosing and Treating Practitioners, All Other	225	\$63,300	0.47	3	1.2%	1	0.1%	0.0%	1.3%	1	89	59
Medical and Clinical Laboratory Technologists	2,033	\$57,100	1.30	55	2.6%	55	0.5%	0.5%	1.6%	48	471	124
Medical and Clinical Laboratory Technicians	1,936	\$39,200	1.29	58	2.8%	91	1.0%	0.6%	1.9%	97	423	176
Dental Hygienists	1,626	\$65,300	0.86	12	0.7%	98	1.3%	1.1%	1.9%	19	252	214
Cardiovascular Technologists and Technicians	504	\$50,900	0.98	4	0.7%	13	0.5%	0.6%	1.4%	41	89	70
Diagnostic Medical Sonographers	662	\$72,100	1.06	5	0.7%	14	0.4%	0.4%	1.7%	80	113	112
Nuclear Medicine Technologists	225	\$69,600	1.20	2	0.8%	4	0.4%	0.5%	1.4%	7	37	-14
Radiologic Technologists	2,010	\$53,800	1.06	17	0.8%	43	0.4%	0.4%	1.7%	99	344	19
Magnetic Resonance Imaging Technologists	301	\$59,900	0.87	2	0.8%	6	0.4%	0.3%	1.8%	15	57	6
Emergency Medical Technicians and Paramedics	2,512	\$36,500	1.13	47	1.8%	186	1.6%	1.2%	1.3%	94	413	508
Dietetic Technicians	418	\$24,600	1.35	6	1.4%	12	0.6%	0.5%	1.1%	53	46	23
Pharmacy Technicians	4,285	\$31,200	1.18	73	1.7%	304	1.5%	1.1%	1.2%	166	409	110

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST				
	PAST 4 QUARTERS		Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS				
	EMPL	AVG. ANNUAL WAGES <sup>1</sup>	LOCATION QUOTIENT	UNEMPL		UNEMPL RATE	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS <sup>2</sup>	TOTAL REPL DEMAND	AVG. ANNUAL GROWTH %	
Psychiatric Technicians	761	\$40,100	1.23	13	1.6%	15	0.4%	0.1%	1.5%	41	70	-9	-0.1%
Respiratory Therapy Technicians	225	\$52,900	2.14	3	1.4%	4	0.4%	0.4%	1.2%	7	15	-47	-2.3%
Surgical Technologists	935	\$42,900	0.93	13	1.4%	32	0.7%	0.5%	2.0%	53	83	48	0.5%
Veterinary Technologists and Technicians	920	\$37,300	0.96	16	1.7%	139	3.3%	3.0%	3.7%	37	95	119	1.2%
Ophthalmic Medical Technicians	396	\$30,000	0.93	6	1.3%	11	0.5%	1.2%	2.0%	12	47	70	1.6%
Licensed Practical and Licensed Vocational Nurses	6,698	\$42,700	1.05	195	2.8%	362	1.1%	0.7%	1.4%	140	1,719	525	0.8%
Medical Records and Health Information Technicians	2,260	\$42,300	1.23	48	2.1%	108	1.0%	1.0%	1.8%	257	476	163	0.7%
Opticians, Dispensing	809	\$34,700	1.13	15	1.8%	81	2.1%	2.5%	2.8%	28	235	114	1.3%
Orthotists and Prosthetists	60	\$59,800	0.83	1	1.8%	-1	-0.2%	0.6%	1.4%	0	5	10	1.6%
Hearing Aid Specialists	71	\$40,500	1.15	1	1.6%	16	5.1%	4.4%	3.2%	5	8	14	1.8%
Health Technologists and Technicians, All Other	1,283	\$47,500	1.07	17	1.3%	70	1.1%	0.4%	3.4%	53	139	163	1.2%
Occupational Health and Safety Specialists	702	\$68,100	0.98	19	2.6%	23	0.7%	1.0%	0.9%	51	153	-18	-0.3%
Occupational Health and Safety Technicians	144	\$47,000	0.89	4	2.5%	5	0.7%	1.1%	0.8%	0	34	3	0.2%
Athletic Trainers	241	\$45,000	1.03	6	2.6%	15	1.3%	1.0%	1.9%	7	53	39	1.5%
Genetic Counselors	29	\$68,400	0.95	1	2.0%	0	0.2%	0.4%	2.0%	2	6	5	1.6%
Healthcare Practitioners and Technical Workers, All Other	412	\$61,900	1.13	14	3.3%	19	1.0%	0.9%	1.6%	3	69	36	0.8%
Home Health Aides	7,297	\$22,900	0.89	391	5.1%	2,119	7.1%	6.6%	4.4%	115	1,595	2,111	2.6%
Psychiatric Aides	647	\$24,000	0.91	36	4.8%	4	0.1%	0.1%	1.1%	0	134	-21	-0.3%
Nursing Assistants	17,700	\$25,700	1.30	859	4.6%	840	1.0%	0.7%	1.2%	250	3,891	1,562	0.8%
Orderlies	532	\$23,200	1.05	23	4.0%	15	0.6%	0.6%	1.3%	10	110	18	0.3%
Occupational Therapy Assistants	475	\$53,100	1.31	7	1.4%	51	2.3%	1.4%	2.5%	23	148	178	3.2%
Occupational Therapy Aides	72	\$25,500	0.97	1	1.8%	7	2.0%	1.4%	2.6%	1	22	19	2.4%
Physical Therapist Assistants	1,039	\$48,900	1.30	28	2.6%	112	2.3%	1.3%	2.6%	38	320	342	2.9%
Physical Therapist Aides	373	\$34,400	0.77	11	2.8%	42	2.4%	1.3%	2.9%	12	106	127	3.0%
Massage Therapists	1,490	\$36,600	0.90	21	1.4%	20	0.3%	0.2%	1.9%	15	247	425	2.5%
Dental Assistants	2,824	\$35,200	0.94	91	3.1%	169	1.2%	1.1%	2.0%	116	693	368	1.2%
Medical Assistants	5,284	\$31,400	0.91	162	3.0%	258	1.0%	0.7%	2.2%	231	1,087	824	1.5%
Medical Equipment Preparers	622	\$31,100	1.20	18	2.9%	22	0.7%	0.6%	1.8%	22	122	30	0.5%
Medical Transcriptionists	640	\$40,300	1.13	14	2.2%	-4	-0.1%	-0.8%	1.2%	13	119	-15	-0.2%
Pharmacy Aides	394	\$29,100	1.11	23	5.6%	28	1.5%	1.0%	1.0%	4	73	-27	-0.7%
Veterinary Assistants and Laboratory Animal Caretakers	806	\$25,300	1.05	34	4.0%	113	3.1%	2.8%	3.6%	53	161	28	0.3%
Phlebotomists	1,047	\$32,600	0.93	24	2.2%	130	2.7%	0.9%	2.1%	49	233	179	1.6%
Healthcare Support Workers, All Other	502	\$37,000	0.58	27	4.9%	24	1.0%	0.7%	1.6%	52	97	40	0.8%
First-Line Supervisors of Correctional Officers	168	\$72,400	0.45	4	1.7%	-16	-1.8%	0.0%	-0.2%	2	48	-8	-0.5%
First-Line Supervisors of Police and Detectives	732	\$80,300	0.86	16	2.0%	-8	-0.2%	-0.3%	0.3%	4	262	-17	-0.2%
First-Line Supervisors of Fire Fighting and Prevention Workers	398	\$87,400	0.82	4	1.1%	1	0.1%	0.2%	0.5%	2	185	-5	-0.1%
First-Line Supervisors of Protective Service Workers, All Other	565	\$45,800	0.84	8	1.4%	-3	-0.1%	0.6%	1.4%	8	149	-5	-0.1%
Firefighters	2,931	\$59,300	1.10	269	8.4%	38	0.3%	0.5%	0.6%	8	876	-28	-0.1%



## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST				
	PAST 4 QUARTERS			Q2 2017	TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS				
	EMPL	AVG. ANNUAL WAGES <sup>a</sup>	LOCATION QUOTIENT			EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS <sup>b</sup>	TOTAL REPL DEMAND	TOTAL ANNUAL GROWTH %	
Fire Inspectors and Investigators	95	\$50,500	0.92	3	3.4%	2	0.4%	0.2%	0.5%	1	27	0	-0.1%
Forest Fire Inspectors and Prevention Specialists	7	\$42,200	0.45	0	n/a	0	-0.5%	-0.9%	0.3%	0	2	0	0.7%
Bailiffs	89	\$35,300	0.53	2	1.9%	-1	-0.3%	-0.3%	0.2%	3	25	-1	-0.1%
Correctional Officers and Jailers	1,601	\$46,100	0.44	42	2.0%	-134	-1.6%	0.4%	0.0%	13	429	-42	-0.3%
Detectives and Criminal Investigators	521	\$79,300	0.54	31	5.4%	-26	-1.0%	-0.7%	0.0%	75	122	-50	-1.0%
Fish and Game Wardens	22	\$52,100	0.42	2	7.3%	-1	-1.2%	-1.4%	0.0%	2	6	-1	-0.4%
Parking Enforcement Workers	47	\$37,700	0.58	2	4.9%	0	0.2%	0.3%	0.7%	4	12	-10	-2.3%
Police and Sheriffs Patrol Officers	5,814	\$53,400	1.03	36	0.6%	-39	-0.1%	-0.1%	0.5%	38	1,926	-67	-0.1%
Transit and Railroad Police	31	\$64,600	0.58	1	2.4%	0	-0.1%	0.0%	0.6%	19	8	-1	-0.3%
Animal Control Workers	77	\$39,000	0.72	6	7.2%	0	0.0%	0.4%	0.7%	1	17	0	0.0%
Private Detectives and Investigators	314	\$50,900	0.98	5	1.5%	24	1.6%	1.8%	1.6%	14	116	3	0.1%
Gaming Surveillance Officers and Gaming Investigators	113	\$34,900	1.25	3	2.7%	-51	-7.2%	-4.2%	0.1%	9	11	-11	-1.0%
Security Guards	9,052	\$28,400	0.88	315	3.4%	-93	-0.2%	0.7%	1.8%	221	1,220	-148	-0.2%
Crossing Guards	191	\$31,200	0.28	22	9.7%	10	1.1%	1.2%	1.0%	1	33	4	0.2%
Lifeguards, Ski Patrol, and Other Recreational Protective Service	1,827	\$19,100	1.35	98	5.1%	63	0.7%	0.9%	1.8%	22	267	15	0.1%
Transportation Security Screeners	337	\$38,300	0.95	33	9.0%	-3	-0.2%	-0.8%	-0.3%	17	40	-49	-1.6%
Protective Service Workers, All Other	1,382	\$30,000	1.15	53	3.7%	-28	-0.4%	0.1%	1.2%	45	255	-22	-0.2%
Chefs and Head Cooks	1,154	\$44,400	0.88	51	4.3%	59	1.1%	1.1%	2.4%	101	219	36	0.3%
First-Line Supervisors of Food Preparation and Serving Workers	9,826	\$32,400	1.16	319	3.2%	1,099	2.4%	2.2%	3.0%	989	2,978	304	0.3%
Cooks, Fast Food	5,045	\$19,100	1.03	392	7.3%	834	3.7%	3.2%	3.8%	11	1,248	-1,069	-2.4%
Cooks, Institution and Cafeteria	4,404	\$25,000	1.21	325	6.8%	210	1.0%	1.2%	1.5%	72	1,134	96	0.2%
Cooks, Private Household	191	\$38,900	0.64	2	0.9%	-28	-2.7%	-1.7%	-1.6%	1	246	-28	-1.6%
Cooks, Restaurant	12,281	\$23,800	1.10	924	7.1%	769	1.3%	1.3%	2.8%	324	3,443	978	0.8%
Cooks, Short Order	1,672	\$22,400	0.99	138	7.7%	150	1.9%	1.8%	2.8%	7	463	-179	-1.1%
Cooks, All Other	161	\$27,400	0.98	15	8.5%	8	1.0%	1.4%	2.3%	0	34	-1	-0.1%
Food Preparation Workers	7,993	\$21,400	1.01	571	6.7%	633	1.7%	1.8%	2.6%	395	2,390	12	0.0%
Bartenders	6,407	\$21,400	1.15	346	5.2%	309	1.0%	0.7%	2.2%	155	2,462	229	0.4%
Combined Food Preparation and Serving Workers, Including Fast Food	35,205	\$20,100	1.12	3,262	8.6%	5,231	3.3%	3.0%	3.4%	1,430	11,478	1,172	0.3%
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	4,402	\$20,000	0.95	404	8.5%	550	2.7%	2.4%	3.1%	126	2,924	-35	-0.1%
Waiters and Waitresses	25,219	\$20,300	1.07	1,517	5.7%	1,571	1.3%	1.3%	2.8%	421	12,173	-748	-0.3%
Food Servers, Nonrestaurant	2,826	\$19,900	1.17	162	5.5%	166	1.2%	1.1%	2.0%	7	680	155	0.5%
Dining Room and Cafeteria Attendants and Bartender Helpers	3,791	\$20,500	0.96	243	6.1%	236	1.3%	1.3%	2.6%	138	1,880	-6	0.0%
Dishwashers	4,776	\$20,800	1.01	498	9.6%	319	1.4%	1.4%	2.8%	217	1,905	-473	-1.0%
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	3,778	\$20,000	1.01	226	5.7%	213	1.2%	1.3%	2.8%	146	2,826	-40	-0.1%
Food Preparation and Serving Related Workers, All Other	444	\$20,000	0.79	40	8.2%	53	2.6%	2.2%	2.9%	0	259	7	0.2%
First-Line Supervisors of Housekeeping and Janitorial Workers	1,987	\$40,700	0.92	25	1.2%	39	0.4%	0.3%	1.1%	14	410	15	0.1%
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	1,476	\$50,400	0.89	21	1.4%	64	0.9%	0.8%	1.6%	21	412	25	0.2%

# Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST				
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS			
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS*	TOTAL REPL DEMAND	TOTAL GROWTH %
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	22,440	\$24,800	1.04	1,144	4.9%	904	0.8%	1.1%	1.6%	705	4,432	-8	0.0%
Maids and Housekeeping Cleaners	9,431	\$22,700	0.85	410	4.2%	-1,210	-2.4%	-4.6%	-1.5%	506	2,479	226	0.2%
Building Cleaning Workers, All Other	152	\$29,400	1.02	11	6.9%	7	1.0%	1.4%	2.1%	8	34	-1	-0.1%
Pest Control Workers	624	\$33,700	0.85	28	4.3%	69	2.4%	3.0%	3.6%	19	165	-44	-0.7%
Landscaping and Groundskeeping Workers	10,276	\$28,700	0.93	737	6.8%	754	1.5%	1.2%	2.2%	183	2,364	171	0.2%
Pesticide Handlers, Sprayers, and Applicators, Vegetation	204	\$36,600	0.62	14	6.0%	16	1.7%	0.8%	1.5%	12	56	-2	-0.1%
Tree Trimmers and Pruners	716	\$38,200	1.46	60	8.1%	78	2.4%	1.7%	2.5%	17	156	9	0.1%
Grounds Maintenance Workers, All Other	164	\$39,100	0.89	15	8.2%	8	1.0%	0.8%	1.4%	2	42	-4	-0.2%
Gaming Supervisors	368	\$49,800	1.21	5	1.5%	-30	-1.6%	-0.7%	0.1%	10	129	-10	-0.3%
Slot Supervisors	104	\$41,500	1.17	1	1.4%	-10	-1.8%	-0.9%	0.1%	10	30	-11	-1.1%
First-Line Supervisors of Personal Service Workers	2,290	\$35,100	0.88	19	0.8%	195	1.8%	2.0%	2.4%	27	716	134	0.6%
Animal Trainers	244	\$39,700	0.75	4	1.5%	7	0.6%	0.5%	1.4%	11	198	9	0.4%
Nonfarm Animal Caretakers	2,397	\$24,200	1.12	98	4.0%	123	1.1%	1.9%	3.0%	179	610	139	0.6%
Gaming Dealers	1,007	\$23,900	1.09	39	3.9%	-204	-3.6%	-1.9%	0.2%	26	174	-23	-0.2%
Gaming and Sports Book Writers and Runners	137	\$24,300	1.15	5	3.9%	-60	-7.0%	-4.0%	0.3%	0	28	-4	-0.3%
Gaming Service Workers, All Other	129	\$26,800	1.02	8	6.2%	-30	-4.1%	-2.3%	0.5%	3	33	-3	-0.3%
Motion Picture Projectionists	58	\$21,100	1.00	4	6.7%	6	2.4%	0.6%	2.5%	2	37	-12	-2.3%
Ushers, Lobby Attendants, and Ticket Takers	1,221	\$20,700	1.08	143	10.6%	140	2.5%	0.9%	3.0%	10	803	-5	0.0%
Amusement and Recreation Attendants	3,167	\$19,900	1.12	245	7.2%	191	1.3%	1.6%	2.5%	15	1,382	79	0.2%
Costume Attendants	47	\$42,600	0.72	3	6.0%	7	3.3%	1.9%	2.8%	0	22	0	0.1%
Locker Room, Coatroom, and Dressing Room Attendants	459	\$20,100	2.40	31	6.6%	19	0.9%	1.2%	2.2%	10	177	10	0.2%
Entertainment Attendants and Related Workers, All Other	147	\$23,300	1.05	12	7.7%	4	0.5%	2.4%	2.1%	0	90	8	0.5%
Embalmers	42	\$50,600	1.19	4	8.0%	0	0.0%	0.0%	0.5%	2	13	-5	-1.2%
Funeral Attendants	457	\$25,000	1.29	37	7.5%	0	0.0%	0.1%	0.5%	1	109	-31	-0.7%
Morticians, Undertakers, and Funeral Directors	328	\$55,300	1.11	7	2.1%	-4	-0.2%	-0.2%	0.3%	1	93	3	0.1%
Barbers	665	\$28,300	1.18	3	0.5%	-8	-0.2%	0.2%	1.3%	2	546	42	0.6%
Hairdressers, Hairstylists, and Cosmetologists	5,973	\$28,500	1.07	109	1.8%	-121	-0.4%	-0.2%	1.5%	120	2,476	324	0.5%
Makeup Artists, Theatrical and Performance	21	\$67,800	0.46	0	n/a	2	1.9%	1.3%	2.6%	3	3	1	0.6%
Manicurists and Pedicurists	656	\$27,400	0.54	12	1.8%	-8	-0.2%	0.5%	2.3%	0	87	38	0.6%
Shampooers	221	\$18,900	0.94	4	2.0%	-3	-0.3%	0.2%	2.0%	0	32	12	0.5%
Skincare Specialists	539	\$35,600	0.94	10	1.8%	1	0.0%	0.3%	2.0%	13	59	36	0.7%
Baggage Porters and Bellhops	373	\$21,400	0.81	14	3.8%	33	1.9%	1.3%	2.4%	6	76	3	0.1%
Concierges	366	\$24,900	1.12	15	3.9%	28	1.6%	1.4%	2.3%	21	79	12	0.3%
Tour Guides and Escorts	535	\$23,600	1.12	39	6.9%	0	0.0%	1.3%	2.0%	2	256	2	0.0%
Travel Guides	24	\$34,000	0.64	2	8.7%	0	-0.3%	2.5%	1.8%	4	7	-2	-0.6%
Childcare Workers	9,933	\$23,000	1.04	416	4.0%	-1,453	-2.7%	-4.3%	-2.0%	608	3,756	156	0.2%
Personal Care Aides	20,945	\$21,300	1.34	1,068	4.9%	7,809	9.8%	9.0%	5.5%	186	2,300	3,674	1.6%
Fitness Trainers and Aerobics Instructors	2,913	\$39,200	1.04	115	3.8%	90	0.6%	1.0%	2.6%	67	587	68	0.2%

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST				
	PAST 4 QUARTERS			Q2 2017	TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS				
	EMPL	AVG. ANNUAL WAGES <sup>a</sup>	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE	EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS <sup>b</sup>	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND	AVG. ANNUAL GROWTH %
Recreation Workers	3,327	\$25,100	0.99	167	4.7%	200	1.3%	1.5%	1.9%	77	683	177	0.5%
Residential Advisors	822	\$29,400	0.78	26	2.9%	78	2.0%	2.3%	2.1%	1	275	82	1.0%
Personal Care and Service Workers, All Other	616	\$26,200	0.71	27	4.0%	1	0.0%	-0.9%	0.8%	1	165	11	0.2%
First-Line Supervisors of Retail Sales Workers	13,466	\$41,900	0.96	196	1.4%	525	0.8%	1.1%	1.1%	2,076	3,623	-45	0.0%
First-Line Supervisors of Non-Retail Sales Workers	3,723	\$73,100	0.93	43	1.1%	-19	-0.1%	0.1%	0.7%	26	717	-12	0.0%
Cashiers	32,378	\$22,300	1.00	2,363	6.8%	1,772	1.1%	1.3%	1.7%	422	13,806	-1,285	-0.4%
Gaming Change Persons and Booth Cashiers	209	\$29,200	1.02	13	5.9%	-97	-7.3%	-4.2%	0.1%	2	50	-33	-1.7%
Counter and Rental Clerks	3,291	\$30,100	0.79	171	4.9%	58	0.4%	0.4%	1.8%	5	779	-59	-0.2%
Parts Salespersons	2,293	\$31,400	1.01	59	2.5%	151	1.4%	1.7%	2.1%	28	529	34	0.1%
Retail Salespersons	39,634	\$28,400	0.95	1,881	4.5%	-568	-0.3%	-0.1%	0.8%	3,286	14,138	694	0.2%
Advertising Sales Agents	1,290	\$44,600	0.90	56	4.1%	-42	-0.6%	-1.6%	0.1%	36	441	-129	-1.0%
Insurance Sales Agents	4,749	\$70,800	1.13	123	2.5%	280	1.2%	1.7%	2.5%	346	1,554	184	0.4%
Securities, Commodities, and Financial Services Sales Agents	4,388	\$90,400	1.24	71	1.6%	193	0.9%	0.3%	0.4%	461	738	52	0.1%
Travel Agents	1,093	\$40,600	1.51	44	3.9%	36	0.7%	4.3%	1.7%	12	350	-211	-2.1%
Sales Representatives, Services, All Other	10,328	\$55,100	1.13	341	3.2%	360	0.8%	1.4%	2.1%	2,087	2,574	148	0.1%
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	3,154	\$80,000	0.99	96	3.0%	262	1.7%	1.7%	1.4%	201	579	-4	0.0%
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	13,206	\$70,800	0.96	377	2.8%	593	0.9%	0.8%	1.2%	45	2,623	-21	0.0%
Demonstrators and Product Promoters	1,542	\$25,300	1.79	196	11.6%	78	1.0%	1.5%	2.3%	121	529	-12	-0.1%
Models	42	\$36,300	0.94	4	9.8%	-2	-0.9%	-0.8%	0.4%	2	14	-3	-0.7%
Real Estate Brokers	756	\$60,000	0.93	9	1.1%	46	1.3%	1.5%	1.8%	4	103	-99	-1.4%
Real Estate Sales Agents	2,742	\$62,200	0.90	36	1.3%	138	1.0%	1.3%	1.7%	96	342	-345	-1.3%
Sales Engineers	635	\$95,200	0.87	12	1.8%	34	1.1%	2.2%	1.6%	41	167	-1	0.0%
Telemarketers	2,653	\$25,100	1.28	573	17.9%	-57	-0.4%	0.8%	3.0%	21	437	-193	-0.8%
Door-to-Door Sales Workers, News and Street Vendors, and Related Workers	721	\$26,400	0.96	7	0.9%	-25	-0.7%	-0.2%	-0.1%	5	713	-102	-1.5%
Sales and Related Workers, All Other	815	\$46,000	0.93	25	2.9%	74	1.9%	2.5%	2.2%	12	89	67	0.8%
First-Line Supervisors of Office and Administrative Support Workers	12,840	\$58,200	0.95	283	2.1%	681	1.1%	1.3%	1.8%	272	1,923	293	0.2%
Switchboard Operators, Including Answering Service	848	\$30,300	1.00	46	5.2%	22	0.5%	0.8%	2.1%	22	181	-304	-4.3%
Telephone Operators	116	\$42,600	1.11	10	7.9%	10	1.9%	1.8%	1.1%	0	43	-48	-5.2%
Communications Equipment Operators, All Other	24	\$41,500	0.95	3	10.3%	1	1.1%	1.0%	1.6%	0	4	-4	-1.9%
Bill and Account Collectors	3,706	\$32,700	1.34	305	7.7%	-36	-0.2%	-0.8%	1.2%	150	732	-236	-0.7%
Billing and Posting Clerks	5,039	\$37,100	1.09	126	2.4%	301	1.2%	1.4%	2.1%	146	1,020	326	0.6%
Bookkeeping, Accounting, and Auditing Clerks	15,943	\$39,700	1.02	355	2.2%	871	1.1%	1.3%	1.8%	630	1,423	-2,181	-1.5%
Gaming Cage Workers	159	\$27,100	0.89	10	6.0%	-53	-5.6%	-3.3%	0.4%	9	18	1	0.1%
Payroll and Timekeeping Clerks	1,481	\$39,800	0.99	61	3.9%	102	1.4%	1.7%	2.1%	76	349	-127	-0.9%
Procurement Clerks	736	\$39,000	1.15	20	2.6%	30	0.8%	1.0%	1.3%	8	238	-94	-1.4%
Tellers	5,077	\$27,400	1.13	75	1.4%	-144	-0.6%	-0.7%	-0.3%	170	1,767	-696	-1.5%
Financial Clerks, All Other	444	\$39,300	1.30	11	2.4%	16	0.7%	0.5%	1.4%	4	109	7	0.2%



# Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT					HISTORICAL 2012-2017				FORECAST			
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS			
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE	EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS*	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND	AVG. ANNUAL GROWTH %
Brokerage Clerks	1,316	\$46,000	2.39	92	6.7%	113	1.8%	1.3%	0.9%	1	290	4	0.0%
Correspondence Clerks	115	\$35,400	1.76	3	2.2%	6	1.1%	1.3%	2.0%	2	22	-18	-1.7%
Court, Municipal, and License Clerks	1,179	\$33,900	1.07	33	2.6%	-12	-0.2%	-0.3%	0.3%	18	75	-13	-0.1%
Credit Authorizers, Checkers, and Clerks	369	\$38,000	1.08	10	2.6%	3	0.1%	0.3%	1.3%	1	38	-33	-0.9%
Customer Service Representatives	26,964	\$35,900	1.08	1,200	4.3%	601	0.5%	0.8%	2.0%	1,436	6,950	771	0.3%
Eligibility Interviewers, Government Programs	1,162	\$40,500	0.94	45	3.7%	-26	-0.4%	-0.3%	0.7%	8	113	-52	-0.5%
File Clerks	1,340	\$35,900	1.08	96	6.7%	71	1.1%	1.1%	1.8%	24	296	-146	-1.1%
Hotel, Motel, and Resort Desk Clerks	1,537	\$21,500	0.69	72	4.4%	100	1.4%	0.9%	1.8%	164	785	20	0.1%
Interviewers, Except Eligibility and Loan	2,474	\$31,200	1.41	192	7.2%	260	2.2%	1.8%	1.8%	4	515	-56	-0.2%
Library Assistants, Clerical	810	\$25,800	0.95	44	5.1%	13	0.3%	0.2%	1.1%	11	231	-5	-0.1%
Loan Interviewers and Clerks	2,619	\$40,200	1.27	73	2.7%	-48	-0.4%	-0.2%	1.6%	54	432	89	0.3%
New Accounts Clerks	498	\$32,900	1.31	13	2.5%	-7	-0.3%	-0.7%	-0.3%	37	134	-69	-1.5%
Order Clerks	1,628	\$33,700	0.97	84	4.9%	142	1.8%	1.5%	2.2%	5	445	-91	-0.6%
Human Resources Assistants, Except Payroll and Timekeeping	1,297	\$41,200	1.02	35	2.6%	63	1.0%	1.0%	1.8%	19	148	-107	-0.9%
Receptionists and Information Clerks	8,720	\$25,600	0.91	366	4.0%	495	1.2%	1.3%	2.2%	283	2,299	299	0.3%
Reservation and Transportation Ticket Agents and Travel Clerks	945	\$36,200	0.67	26	2.7%	92	2.1%	2.4%	1.6%	24	265	-78	-0.9%
Information and Record Clerks, All Other	1,287	\$41,100	0.86	51	3.8%	13	0.2%	0.6%	1.0%	2	460	-20	-0.2%
Cargo and Freight Agents	1,077	\$43,500	1.27	30	2.7%	214	4.5%	5.9%	2.9%	82	325	-1	0.0%
Couriers and Messengers	823	\$30,500	0.95	27	3.2%	-49	-1.1%	-0.6%	1.5%	17	200	-4	0.0%
Police, Fire, and Ambulance Dispatchers	705	\$41,300	0.90	60	7.7%	12	0.3%	0.3%	0.7%	31	171	-41	-0.6%
Dispatchers, Except Police, Fire, and Ambulance	2,040	\$43,900	1.08	65	3.1%	102	1.0%	1.5%	2.2%	76	504	-37	-0.2%
Meter Readers, Utilities	156	\$49,500	0.47	6	3.7%	4	0.5%	0.6%	0.8%	4	56	-31	-2.2%
Postal Service Clerks	626	\$46,100	0.84	8	1.2%	-3	-0.1%	-0.1%	-0.3%	11	276	-204	-3.9%
Postal Service Mail Carriers	3,578	\$50,500	1.19	54	1.5%	-18	-0.1%	0.0%	-0.1%	28	1,615	-1,165	-3.9%
Postal Service Mail Sorters, Processors, and Processing Machine Operators	1,382	\$48,900	1.16	47	3.3%	-7	-0.1%	0.2%	0.1%	12	532	-544	-4.9%
Production, Planning, and Expediting Clerks	2,866	\$50,900	0.96	40	1.4%	185	1.3%	1.4%	1.6%	82	807	-133	-0.5%
Shipping, Receiving, and Traffic Clerks	5,583	\$35,300	0.89	276	4.7%	383	1.4%	1.0%	1.8%	150	1,126	-372	-0.7%
Stock Clerks and Order Fillers	17,605	\$28,100	0.95	1,032	5.6%	445	0.5%	0.6%	1.5%	1,037	5,882	-115	-0.1%
Weighers, Measurers, Checkers, and Samplers, Recordkeeping	818	\$28,100	1.16	42	5.0%	106	2.8%	2.1%	1.9%	5	226	-27	-0.3%
Executive Secretaries and Executive Administrative Assistants	6,140	\$54,400	1.01	238	3.7%	315	1.1%	1.2%	1.7%	99	627	-712	-1.2%
Legal Secretaries	1,802	\$45,400	1.03	69	3.7%	29	0.3%	0.3%	0.2%	27	236	-193	-1.1%
Medical Secretaries	6,562	\$33,600	1.26	150	2.3%	346	1.1%	0.9%	2.1%	594	626	864	1.2%
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	34,045	\$35,100	1.53	1,062	3.0%	1,889	1.1%	1.3%	1.7%	974	3,542	-983	-0.3%
Computer Operators	7,727	\$43,200	1.62	42	5.5%	34	1.0%	1.1%	1.9%	1	167	-169	-2.6%
Data Entry Keyers	1,859	\$30,500	1.01	114	5.8%	122	1.4%	1.5%	2.2%	172	755	-175	-1.0%
Word Processors and Typists	473	\$33,500	0.64	49	9.1%	-9	-0.4%	-0.5%	0.4%	5	144	-81	-1.9%
Desktop Publishers	138	\$52,100	0.99	5	3.4%	-12	-1.7%	-3.5%	-0.6%	1	37	-36	-3.0%

# Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT					HISTORICAL 2012-2017				FORECAST			
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			CURRENT ONLINE JOB ADS*	NEXT TEN YEARS		
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		ST. LOUIS, MO-IL MSA	MISSOURI	USA		TOTAL REPL DEMAND	TOTAL GROWTH DEMAND	AVG. ANNUAL GROWTH %
Insurance Claims and Policy Processing Clerks	3,244	\$48,500	1.25	66	2.0%	201	1.3%	1.6%	2.3%	64	877	-18	-0.1%
Mail Clerks and Mail Machine Operators, Except Postal Service	980	\$31,100	1.15	85	8.0%	3	0.1%	-0.6%	0.6%	34	266	-206	-2.3%
Office Clerks, General	24,335	\$32,700	0.87	1,090	4.2%	1,524	1.3%	1.4%	1.9%	191	5,192	-584	-0.2%
Office Machine Operators, Except Computer	581	\$32,100	1.06	44	7.1%	-3	-0.1%	-0.7%	1.3%	17	187	-97	-1.8%
Proofreaders and Copy Markers	96	\$37,500	0.70	4	3.6%	-2	-0.4%	-1.7%	0.3%	1	22	-4	-0.4%
Statistical Assistants	131	\$40,600	1.08	3	2.6%	3	0.5%	0.5%	1.4%	12	49	-16	-1.3%
Office and Administrative Support Workers, All Other	2,280	\$38,000	1.09	81	3.4%	74	0.7%	0.8%	1.3%	10	656	33	0.1%
First-Line Supervisors of Farming, Fishing, and Forestry Workers	180	\$43,000	0.44	3	1.7%	13	1.5%	0.5%	0.6%	5	52	-23	-1.4%
Agricultural Inspectors	71	\$45,100	0.54	4	4.3%	0	-0.1%	-0.3%	0.4%	10	15	-6	-0.9%
Animal Breeders	24	\$43,100	0.49	0	n/a	3	2.8%	1.6%	2.2%	7	150	-2	-0.7%
Graders and Sorters, Agricultural Products	177	\$24,700	0.34	16	7.8%	14	1.6%	0.9%	1.2%	3	32	-18	-1.1%
Agricultural Equipment Operators	237	\$33,800	0.42	17	6.4%	27	2.4%	0.7%	1.1%	3	63	2	0.1%
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	979	\$24,900	0.19	80	7.0%	77	1.6%	1.4%	1.3%	14	244	-129	-1.4%
Farmworkers, Farm, Ranch, and Aquacultural Animals	854	\$26,800	0.59	31	3.6%	135	3.5%	1.6%	2.0%	11	621	-56	-0.7%
Agricultural Workers, All Other	72	\$35,800	0.73	6	8.0%	3	0.9%	0.9%	1.2%	0	14	-4	-0.5%
Fishers and Related Fishing Workers	41	\$31,300	0.21	1	2.0%	-1	-0.3%	-1.6%	-0.4%	3	0	-5	-1.4%
Forest and Conservation Workers	43	\$31,800	0.39	4	7.9%	-1	-0.6%	-0.1%	0.1%	1	14	-1	-0.2%
Fallers	18	\$43,700	0.25	1	5.9%	0	0.5%	0.3%	0.8%	1	17	-2	-1.5%
Logging Equipment Operators	41	\$39,600	0.12	2	4.7%	-5	-2.2%	0.0%	0.5%	0	14	-2	-0.6%
Log Graders and Skidders	11	\$38,900	0.28	0	n/a	-1	-1.4%	-0.3%	0.7%	0	8	-1	-0.6%
Logging Workers, All Other	5	\$41,300	0.11	0	n/a	0	-1.7%	0.0%	0.6%	2	2	0	-0.7%
Supervisors of Construction and Extraction Workers	4,454	\$78,700	0.79	133	2.9%	372	1.8%	2.0%	2.5%	111	401	263	0.6%
Boilermakers	181	\$72,700	1.10	21	10.7%	15	1.7%	2.6%	2.4%	3	28	11	0.6%
Brickmasons and Blockmasons	899	\$66,200	1.17	58	6.2%	13	0.3%	1.4%	2.1%	3	91	169	1.7%
Stonemasons	146	\$43,400	0.87	8	5.1%	5	0.7%	1.2%	2.5%	0	14	22	1.4%
Carpenters	9,475	\$59,500	1.03	444	4.6%	1,020	2.3%	2.0%	2.9%	61	1,569	270	0.3%
Carpet Installers	364	\$57,600	0.86	17	4.6%	20	1.1%	0.6%	2.3%	5	85	-16	-0.4%
Floor Layers, Except Carpet, Wood, and Hard Tiles	237	\$51,900	1.43	11	4.5%	23	2.1%	1.5%	2.7%	1	55	21	0.8%
Floor Sanders and Finishers	75	\$47,500	0.97	3	4.6%	7	2.0%	1.2%	2.7%	5	18	1	0.2%
Tile and Marble Setters	521	\$65,300	0.90	22	4.2%	49	2.0%	1.2%	3.1%	4	136	9	0.2%
Cement Masons and Concrete Finishers	1,976	\$58,100	1.18	189	8.9%	403	4.7%	3.4%	4.8%	15	249	165	0.8%
Terrazzo Workers and Finishers	40	\$56,100	1.13	4	9.0%	6	3.4%	2.9%	4.8%	1	4	1	0.2%
Construction Laborers	11,252	\$49,200	0.99	886	7.4%	852	1.6%	1.4%	2.4%	160	2,890	1,145	1.0%
Paving, Surfacing, and Tamping Equipment Operators	428	\$42,200	0.78	69	13.8%	8	0.4%	0.6%	2.0%	6	102	24	0.5%
Pile-Driver Operators	31	\$75,300	0.78	3	8.2%	2	1.0%	0.3%	2.1%	0	5	4	1.2%
Operating Engineers and Other Construction Equipment Operators	2,977	\$58,000	0.88	216	6.8%	179	1.2%	1.1%	1.6%	23	502	221	0.7%
Drywall and Ceiling Tile Installers	710	\$47,900	0.65	43	5.7%	124	3.9%	2.3%	4.0%	5	55	7	0.1%
Tapers	224	\$62,400	0.94	12	5.3%	44	4.5%	3.1%	4.5%	3	17	2	0.1%

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST				
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS			
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE	EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS*	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND	AVG. ANNUAL GROWTH %
Electricians	5,421	\$67,000	0.88	215	3.8%	396	1.5%	2.9%	2.8%	57	933	526	0.9%
Glaziers	460	\$58,900	0.99	23	4.9%	87	4.3%	3.2%	4.6%	5	65	27	0.6%
Insulation Workers, Floor, Ceiling, and Wall	377	\$35,100	1.24	22	5.7%	81	5.0%	3.4%	3.6%	1	125	6	0.2%
Insulation Workers, Mechanical	330	\$58,700	1.19	25	7.1%	45	3.0%	1.8%	3.2%	1	100	49	1.4%
Painters, Construction and Maintenance	3,519	\$53,400	1.03	182	5.0%	173	1.0%	0.7%	1.8%	59	1,000	165	0.5%
Paperhangers	56	\$44,500	1.03	2	3.7%	3	1.1%	0.8%	1.4%	2	18	-1	-0.1%
Pipelayers	296	\$66,800	0.70	14	4.6%	10	0.7%	1.4%	2.2%	0	38	38	1.2%
Plumbers, Pipefitters, and Steamfitters	4,034	\$73,500	0.95	151	3.7%	317	1.7%	2.3%	3.6%	54	606	288	0.7%
Plasterers and Stucco Masons	205	\$67,500	0.73	12	5.7%	27	2.8%	1.9%	3.4%	0	10	3	0.2%
Reinforcing Iron and Rebar Workers	241	\$67,600	1.18	15	5.9%	41	3.8%	3.4%	4.6%	4	45	57	2.1%
Roofers	1,272	\$47,200	0.99	119	8.8%	42	0.7%	0.5%	2.6%	39	246	116	0.9%
Sheet Metal Workers	1,700	\$64,700	1.27	91	5.2%	155	1.9%	2.5%	3.3%	17	357	27	0.2%
Structural Iron and Steel Workers	688	\$64,900	1.02	64	8.7%	101	3.2%	3.3%	4.1%	0	111	24	0.3%
Solar Photovoltaic Installers	85	\$51,900	0.84	5	6.1%	8	2.1%	2.9%	4.6%	6	16	16	1.7%
Helpers — Brickmasons, Blockmasons, Stonemasons, and Tile and Marble Setters	253	\$56,500	1.11	39	13.6%	11	0.9%	2.5%	3.3%	0	27	40	1.5%
Helpers — Carpenters	487	\$35,300	1.42	80	14.7%	74	3.3%	3.8%	4.3%	7	59	16	0.3%
Helpers — Electricians	473	\$37,100	0.69	71	13.2%	39	1.8%	3.5%	3.6%	1	60	59	1.2%
Helpers — Painters, Paperhangers, Plasterers, and Stucco Masons	126	\$35,100	1.20	20	14.5%	14	2.5%	2.9%	3.7%	0	17	6	0.5%
Helpers — Pipelayers, Plumbers, Pipefitters, and Steamfitters	385	\$37,300	0.74	57	13.0%	34	1.9%	3.0%	4.2%	4	49	31	0.8%
Helpers — Roofers	99	\$52,600	1.05	19	16.6%	3	0.6%	0.6%	2.8%	1	11	9	0.9%
Helpers, Construction Trades, All Other	130	\$32,300	0.60	17	11.9%	18	3.0%	2.6%	3.6%	4	13	7	0.5%
Construction and Building Inspectors	841	\$52,600	0.91	10	1.2%	46	1.1%	1.7%	1.3%	40	248	37	0.4%
Elevator Installers and Repairers	252	\$75,500	1.07	2	0.6%	30	2.6%	0.8%	2.9%	1	38	21	0.8%
Fence Erectors	204	\$44,400	0.86	14	6.8%	14	1.4%	1.5%	3.0%	9	39	8	0.4%
Hazardous Materials Removal Workers	367	\$39,800	0.83	18	4.8%	0	0.0%	2.5%	1.9%	1	90	15	0.4%
Highway Maintenance Workers	1,543	\$40,000	1.27	158	9.1%	-20	-0.3%	-0.4%	0.3%	22	416	5	0.0%
Rail-Track Laying and Maintenance Equipment Operators	116	\$46,900	0.81	4	3.1%	-6	-1.0%	-1.3%	-0.3%	1	25	2	0.2%
Septic Tank Servicers and Sewer Pipe Cleaners	242	\$43,100	1.02	10	4.1%	0	0.0%	2.8%	2.0%	16	57	33	1.3%
Segmental Pavers	16	\$41,700	0.83	0	n/a	1	1.7%	1.8%	3.5%	2	2	1	0.6%
Construction and Related Workers, All Other	319	\$44,800	0.84	15	4.4%	26	1.7%	1.6%	2.7%	0	53	10	0.3%
Derrick Operators, Oil and Gas	5	\$62,400	0.05	0	n/a	0	-1.6%	-4.1%	-6.4%	0	1	0	0.4%
Rotary Drill Operators, Oil and Gas	18	\$69,700	0.12	1	4.5%	0	-0.1%	-1.7%	-6.0%	3	6	0	0.1%
Service Unit Operators, Oil, Gas, and Mining	50	\$65,300	0.13	2	4.0%	0	-0.1%	-1.5%	-5.6%	0	17	-1	-0.2%
Earth Drillers, Except Oil and Gas	82	\$48,800	0.44	3	4.0%	5	1.3%	2.0%	0.5%	2	20	13	1.5%
Explosives Workers, Ordnance Handling Experts, and Blasters	32	\$66,600	0.61	2	7.1%	0	0.1%	-0.4%	-2.0%	0	8	-1	-0.4%
Continuous Mining Machine Operators	57	\$64,300	0.50	1	2.1%	5	1.7%	-1.4%	-4.1%	6	9	-6	-1.1%
Mine Cutting and Channeling Machine Operators	29	\$61,800	0.48	1	2.5%	3	1.8%	-1.0%	-3.9%	0	6	-2	-0.9%



## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST				
	PAST 4 QUARTERS		Q2 2017		TOTAL	AVG ANNUAL CHANGE			CURRENT ONLINE JOB ADS*	NEXT TEN YEARS			
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL		UNEMPL RATE	EMPL	ST. LOUIS, MO-IL MSA		MISSOURI	USA	TOTAL REPL DEMAND	TOTAL ANNUAL GROWTH
Mining Machine Operators, All Other	10	\$61,300	0.45	0	n/a	1	1.6%	-0.5%	-2.9%	0	2	0	-0.4%
Rock Splitters, Quarry	31	\$42,500	0.83	3	7.2%	2	1.6%	-3.1%	0.7%	1	3	1	0.2%
Roof Bolters, Mining	19	\$70,900	0.56	1	5.6%	2	2.0%	-5.9%	-10.3%	1	3	-4	-2.0%
Roustabouts, Oil and Gas	90	\$49,400	0.19	7	7.3%	4	1.0%	1.2%	-4.7%	0	21	11	1.1%
Helpers – Extraction Workers	52	\$31,900	0.32	2	3.8%	3	1.2%	-2.2%	-4.4%	2	6	4	0.7%
Extraction Workers, All Other	12	\$62,400	0.32	1	9.4%	1	1.3%	-0.4%	-4.9%	0	1	0	0.3%
First-Line Supervisors of Mechanics, Installers, and Repairers	4,142	\$64,000	0.99	120	2.8%	230	1.1%	1.3%	1.6%	178	821	-13	0.0%
Computer, Automated Teller, and Office Machine Repairers	1,068	\$38,400	0.94	40	3.6%	-41	-0.7%	0.0%	0.2%	4	226	-52	-0.5%
Radio, Cellular, and Tower Equipment Installers and Repairers	182	\$52,400	1.40	7	3.9%	-64	-5.9%	-3.8%	-1.4%	13	14	12	0.7%
Telecommunications Equipment Installers and Repairers, Except Line Installers	2,706	\$51,500	1.28	127	4.5%	160	1.2%	1.2%	0.0%	113	236	-325	-1.3%
Avionics Technicians	102	\$62,200	0.61	2	2.1%	10	2.1%	0.2%	1.2%	18	17	-8	-0.8%
Electric Motor, Power Tool, and Related Repairers	181	\$38,100	1.04	8	4.2%	11	1.3%	2.0%	1.0%	0	57	-6	-0.4%
Electrical and Electronics Installers and Repairers, Transportation Equipment	139	\$48,000	1.08	4	2.8%	-4	-0.6%	-0.4%	0.2%	5	22	-2	-0.1%
Electrical and Electronics Repairers, Commercial and Industrial Equipment	500	\$56,300	0.79	22	4.3%	5	0.2%	1.3%	0.4%	28	82	-23	-0.5%
Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	157	\$80,000	0.66	6	3.5%	-17	-2.0%	-0.9%	-0.1%	7	25	-16	-1.1%
Electronic Equipment Installers and Repairers, Motor Vehicles	96	\$31,300	0.86	4	4.5%	1	0.2%	0.4%	1.3%	6	16	-44	-5.9%
Electronic Home Entertainment Equipment Installers and Repairers	382	\$41,900	1.43	30	7.5%	3	0.2%	0.6%	1.1%	24	59	-7	-0.2%
Security and Fire Alarm Systems Installers	605	\$44,000	0.92	41	6.4%	85	3.1%	0.8%	3.1%	23	167	44	0.7%
Aircraft Mechanics and Service Technicians	1,462	\$67,500	1.18	23	1.6%	134	1.9%	1.1%	1.4%	22	330	-90	-0.6%
Automotive Body and Related Repairers	1,799	\$43,800	1.26	56	3.1%	229	2.8%	2.2%	2.6%	50	423	63	0.3%
Automotive Glass Installers and Repairers	260	\$33,100	1.24	8	3.0%	32	2.6%	1.7%	2.3%	5	42	7	0.3%
Automotive Service Technicians and Mechanics	7,294	\$44,700	1.07	246	3.3%	544	1.6%	1.8%	2.4%	246	2,248	-48	-0.1%
Bus and Truck Mechanics and Diesel Engine Specialists	2,412	\$49,400	0.97	52	2.1%	87	0.7%	1.1%	1.6%	99	450	128	0.5%
Farm Equipment Mechanics and Service Technicians	273	\$40,200	0.73	7	2.3%	-21	-1.5%	0.3%	0.7%	11	73	6	0.2%
Mobile Heavy Equipment Mechanics, Except Engines	1,063	\$49,300	0.92	38	3.4%	65	1.3%	1.1%	0.9%	3	260	11	0.1%
Rail Car Repairers	275	\$54,300	1.36	4	1.4%	-9	-0.6%	-0.9%	0.6%	13	67	-7	-0.3%
Motorboat Mechanics and Service Technicians	134	\$39,800	0.59	6	4.1%	1	0.2%	2.5%	2.4%	1	31	-2	-0.2%
Motorcycle Mechanics	92	\$32,700	0.56	4	4.3%	2	0.5%	3.2%	2.7%	1	20	2	0.2%
Outdoor Power Equipment and Other Small Engine Mechanics	317	\$39,800	0.96	15	4.4%	18	1.2%	1.8%	2.0%	4	74	2	0.1%
Bicycle Repairers	98	\$28,900	0.83	5	4.8%	-4	-0.8%	0.6%	2.6%	6	34	19	1.8%
Recreational Vehicle Service Technicians	105	\$35,900	0.81	5	4.7%	5	0.9%	2.2%	3.0%	5	36	0	0.0%
Tire Repairers and Changers	1,083	\$26,400	1.03	57	5.1%	75	1.4%	2.0%	1.9%	10	381	-15	-0.1%
Mechanical Door Repairers	216	\$40,900	1.21	6	2.9%	30	3.0%	2.2%	3.5%	7	86	12	0.5%
Control and Valve Installers and Repairers, Except Mechanical Door	236	\$42,400	0.54	5	2.0%	7	0.6%	0.3%	0.6%	2	96	-11	-0.5%
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	2,536	\$52,600	0.85	69	2.7%	192	1.6%	2.1%	3.5%	94	432	214	0.8%
Home Appliance Repairers	389	\$47,900	0.91	6	1.6%	-19	-0.9%	0.1%	0.6%	18	135	-30	-0.8%
Industrial Machinery Mechanics	2,109	\$53,200	0.67	61	2.8%	63	0.6%	1.4%	0.6%	67	565	245	1.1%

# Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT					HISTORICAL 2012-2017					FORECAST				
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS					
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS*	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND	AVG. ANNUAL GROWTH %	
Maintenance Workers, Machinery	921	\$45,600	1.11	22	2.3%	35	0.8%	1.4%	0.8%	0	145	26	0.3%		
Millwrights	337	\$54,500	0.89	19	5.2%	34	2.1%	2.8%	2.0%	5	69	41	1.1%		
Refractory Materials Repairers, Except Brickmasons	19	\$47,600	1.27	1	3.6%	-3	-3.1%	0.3%	0.2%	0	5	0	-0.2%		
Electrical Power-Line Installers and Repairers	1,170	\$68,800	1.04	35	2.9%	134	2.5%	0.6%	1.4%	7	506	202	1.6%		
Telecommunications Line Installers and Repairers	1,108	\$61,400	1.16	78	6.7%	130	2.5%	2.2%	1.2%	17	168	-70	-0.6%		
Camera and Photographic Equipment Repairers	37	\$44,500	0.91	1	1.5%	0	-0.2%	0.3%	0.8%	0	10	0	0.0%		
Medical Equipment Repairers	603	\$49,000	1.30	9	1.5%	1	0.0%	0.1%	1.0%	18	120	-6	-0.1%		
Musical Instrument Repairers and Tuners	70	\$38,200	0.87	1	1.7%	-10	-2.6%	0.6%	0.3%	0	15	4	0.6%		
Watch Repairers	16	\$40,200	0.88	0	n/a	1	0.9%	-0.3%	0.3%	0	3	-4	-2.9%		
Precision Instrument and Equipment Repairers, All Other	82	\$50,000	0.71	2	1.9%	-1	-0.2%	0.7%	0.5%	0	15	-4	-0.5%		
Maintenance and Repair Workers, General	12,835	\$39,300	1.02	464	3.5%	576	0.9%	0.9%	1.6%	954	3,365	-23	0.0%		
Wind Turbine Service Technicians	37	\$55,000	0.66	1	2.6%	5	2.9%	4.8%	3.3%	1	13	41	7.8%		
Coin, Vending, and Amusement Machine Servicers and Repairers	533	\$34,100	1.45	15	2.8%	-63	-2.2%	-1.3%	0.3%	2	62	-97	-2.0%		
Commercial Divers	41	\$54,700	0.99	2	4.3%	3	1.6%	0.7%	0.8%	1	8	8	1.8%		
Fabric Menders, Except Garment	4	\$28,000	0.62	0	n/a	-1	-2.7%	-1.2%	0.0%	0	1	-1	-1.6%		
Locksmiths and Safe Repairers	137	\$33,600	0.66	5	3.4%	18	2.9%	-0.2%	2.5%	3	77	-22	-1.8%		
Manufactured Building and Mobile Home Installers	31	\$31,400	0.86	2	4.9%	2	1.4%	1.8%	2.5%	3	15	-8	-3.0%		
Riggers	139	\$49,700	0.68	6	4.5%	7	1.0%	1.8%	0.2%	1	45	4	0.3%		
Signal and Track Switch Repairers	85	\$63,500	1.02	1	1.2%	-7	-1.5%	-1.3%	0.4%	2	15	-5	-0.7%		
Helpers — Installation, Maintenance, and Repair Workers	489	\$27,900	0.44	61	10.8%	38	1.6%	1.8%	2.3%	1	154	23	0.5%		
Installation, Maintenance, and Repair Workers, All Other	1,330	\$38,900	0.86	88	6.1%	78	1.2%	1.0%	1.6%	21	239	-11	-0.1%		
First-Line Supervisors of Production and Operating Workers	5,380	\$62,500	0.96	129	2.3%	221	0.8%	1.1%	0.9%	340	942	-449	-0.9%		
Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	1,239	\$54,000	3.63	48	3.9%	159	2.8%	2.1%	-0.3%	15	222	-147	-1.3%		
Coil Winders, Tapers, and Finishers	168	\$35,600	1.28	7	4.2%	-14	-1.6%	-1.0%	-0.1%	0	39	-16	-1.0%		
Electrical and Electronic Equipment Assemblers	1,802	\$36,200	0.93	100	5.3%	94	1.1%	2.2%	0.1%	26	353	-158	-0.9%		
Electromechanical Equipment Assemblers	425	\$36,400	1.03	21	4.8%	29	1.4%	0.2%	0.2%	5	79	-34	-0.8%		
Engine and Other Machine Assemblers	281	\$38,200	0.81	7	2.3%	34	2.6%	1.4%	1.3%	5	56	-19	-0.7%		
Structural Metal Fabricators and Fitters	485	\$46,200	0.69	21	4.1%	34	1.5%	2.3%	1.5%	12	75	-16	-0.3%		
Fiberglass Laminators and Fabricators	128	\$30,700	0.63	5	3.6%	9	1.5%	3.9%	3.2%	1	34	-11	-0.9%		
Team Assemblers	9,238	\$35,400	0.92	622	6.3%	1,986	5.0%	4.3%	2.3%	29	2140	-404	-0.4%		
Timing Device Assemblers and Adjusters	6	\$43,600	0.87	1	11.4%	1	3.7%	1.6%	0.0%	0	2	-1	-1.1%		
Assemblers and Fabricators, All Other	2,141	\$28,200	1.03	197	8.5%	278	2.8%	2.7%	2.4%	65	385	-29	-0.1%		
Bakers	1,544	\$25,800	0.88	89	5.4%	148	2.0%	1.5%	2.4%	69	388	3	0.0%		
Butchers and Meat Cutters	994	\$31,700	0.82	64	6.0%	32	0.7%	1.2%	1.7%	37	197	1	0.0%		
Meat, Poultry, and Fish Cutters and Trimmers	383	\$24,100	0.27	21	4.6%	9	0.5%	0.1%	0.8%	1	68	-16	-0.4%		
Slaughterers and Meat Packers	331	\$26,900	0.44	18	4.9%	5	0.3%	-0.2%	0.8%	1	77	-21	-0.7%		
Food and Tobacco Roasting, Baking, and Drying Machine Operators and Tenders	266	\$29,200	1.37	11	4.0%	8	0.6%	0.3%	1.4%	0	49	-13	-0.5%		

# Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT					HISTORICAL 2012-2017				FORECAST			
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS			
	EMPL	AVG. ANNUAL WAGES <sup>s</sup>	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		EMPL	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS <sup>s</sup>	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND
Food Batchmakers	1,173	\$30,500	0.85	42	3.3%	67	1.2%	-0.5%	1.8%	1	328	-77	-0.7%
Food Cooking Machine Operators and Tenders	207	\$22,700	0.61	28	11.7%	14	1.5%	0.5%	2.0%	2	49	-8	-0.4%
Food Processing Workers, All Other	226	\$24,600	0.53	14	5.4%	37	3.6%	2.2%	1.9%	0	53	11	0.5%
Computer-Controlled Machine Tool Operators, Metal and Plastic	1,498	\$42,100	1.16	60	3.9%	65	0.9%	0.6%	0.3%	62	472	148	0.9%
Computer Numerically Controlled Machine Tool Programmers, Metal and Plastic	163	\$62,400	0.69	6	3.7%	6	0.7%	0.4%	0.4%	14	47	17	1.0%
Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	737	\$31,000	1.12	24	3.1%	-25	-0.7%	0.5%	1.3%	6	279	-203	-3.2%
Forging Machine Setters, Operators, and Tenders, Metal and Plastic	154	\$28,900	0.82	9	5.4%	6	0.8%	1.7%	1.5%	0	53	-38	-2.8%
Rolling Machine Setters, Operators, and Tenders, Metal and Plastic	212	\$38,300	0.81	10	4.8%	-43	-3.6%	1.1%	-0.1%	3	68	-32	-1.6%
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	1,593	\$32,500	0.91	88	5.2%	100	1.3%	1.3%	1.3%	20	327	-393	-2.8%
Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic	127	\$33,100	1.11	8	6.1%	-4	-0.7%	0.8%	0.1%	8	47	-33	-2.9%
Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	922	\$32,900	1.35	40	4.3%	-7	-0.2%	0.8%	0.3%	5	480	-242	-3.0%
Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	382	\$38,400	1.23	20	5.2%	-16	-0.8%	-0.4%	0.0%	6	151	-97	-2.9%
Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic	202	\$42,000	1.22	28	12.4%	-1	-0.1%	0.3%	0.0%	0	56	-53	-3.0%
Machinists	3,516	\$46,400	0.99	142	3.9%	140	0.8%	0.9%	0.4%	71	1,001	83	0.2%
Metal-Refining Furnace Operators and Tenders	271	\$43,000	1.71	11	4.3%	-76	-4.8%	-4.1%	-1.1%	0	117	-29	-1.1%
Pourers and Casters, Metal	154	\$31,100	2.03	6	4.1%	-29	-3.4%	-0.1%	-1.4%	0	70	-46	-3.5%
Model Makers, Metal and Plastic	49	\$51,000	0.80	3	5.2%	4	1.8%	1.9%	1.4%	1	8	-12	-2.6%
Patternmakers, Metal and Plastic	48	\$45,700	1.47	3	6.7%	-2	-1.0%	0.8%	-0.1%	0	7	-13	-3.1%
Foundry Mold and Coremakers	232	\$36,100	2.08	12	5.1%	-25	-2.1%	3.0%	-1.3%	0	66	-72	-3.7%
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	1,738	\$32,700	1.32	60	3.4%	76	0.9%	2.3%	1.6%	51	503	-486	-3.2%
Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	934	\$38,000	0.87	34	3.5%	42	0.9%	1.0%	1.2%	12	320	-77	-0.9%
Tool and Die Makers	1,007	\$57,600	1.52	28	2.7%	95	2.0%	2.3%	1.1%	11	60	-177	-1.9%
Welders, Cutters, Solderers, and Brazers	2,817	\$39,400	0.78	159	5.3%	140	1.0%	1.2%	1.0%	37	919	-44	-0.2%
Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	303	\$32,000	0.68	17	5.2%	30	2.1%	1.7%	1.1%	0	84	-65	-2.4%
Heat Treating Equipment Setters, Operators, and Tenders, Metal and Plastic	236	\$41,800	1.28	14	5.7%	-16	-1.3%	0.0%	0.1%	6	39	-60	-2.9%
Layout Workers, Metal and Plastic	58	\$46,300	0.68	4	7.0%	4	1.3%	2.6%	0.9%	0	11	-16	-3.0%
Plating and Coating Machine Setters, Operators, and Tenders, Metal and Plastic	375	\$29,900	1.16	10	2.7%	-17	-0.9%	0.0%	0.2%	1	120	-82	-2.5%
Tool Grinders, Filers, and Sharpeners	93	\$35,400	0.98	3	3.4%	4	0.8%	1.2%	0.8%	2	19	-23	-2.8%
Metal Workers and Plastic Workers, All Other	201	\$36,000	0.97	18	8.2%	0	0.0%	-0.2%	1.5%	0	33	-45	-2.5%
Prepress Technician and Workers	401	\$40,800	1.30	15	3.5%	-19	-0.9%	-2.6%	-1.1%	21	100	-124	-3.6%
Printing Press Operators	2,184	\$39,400	1.38	59	2.6%	-69	-0.6%	-1.7%	-0.8%	38	394	-417	-2.1%
Print Binding and Finishing Workers	723	\$32,800	1.52	31	4.1%	-15	-0.4%	-2.2%	-0.9%	20	124	-150	-2.3%
Laundry and Dry-Cleaning Workers	2,076	\$21,800	1.05	107	5.0%	-42	-0.4%	-0.7%	0.5%	24	290	-100	-0.5%
Pressers, Textile, Garment, and Related Materials	400	\$20,100	0.95	20	4.8%	-36	-1.7%	-2.2%	-0.3%	1	84	-50	-1.3%
Sewing Machine Operators	883	\$25,500	0.65	40	4.3%	-209	-4.2%	-1.7%	-0.8%	17	317	-286	-3.8%
Shoe and Leather Workers and Repairers	87	\$27,900	0.90	3	3.6%	3	0.7%	-2.9%	0.1%	0	37	-22	-2.9%
Shoe Machine Operators and Tenders	71	\$27,300	2.38	3	4.5%	25	9.3%	-5.6%	-1.0%	0	32	-28	-4.9%



# Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT					HISTORICAL 2012-2017					FORECAST				
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			CURRENT ONLINE JOB ADS*	NEXT TEN YEARS				
	EMPL	AVG. ANNUAL WAGES*	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		EMPL	ST. LOUIS, MO-IL MSA	MISSOURI		USA	TOTAL REPL DEMAND	TOTAL ANNUAL GROWTH	AVG. ANNUAL GROWTH %	
Sewers, Hand	87	\$26,300	0.74	1	1.3%	-10	-2.1%	-1.2%	-0.3%	1	69	-31	-4.2%		
Tailors, Dressmakers, and Custom Sewers	287	\$30,300	0.76	5	1.8%	-22	-1.5%	-1.2%	-0.1%	10	148	-34	-1.3%		
Textile Bleaching and Dyeing Machine Operators and Tenders	49	\$29,300	0.48	2	3.7%	-8	-3.0%	-1.4%	-2.3%	0	17	-15	-3.5%		
Textile Cutting Machine Setters, Operators, and Tenders	74	\$24,400	0.54	2	2.5%	-15	-3.7%	-1.7%	-0.5%	0	31	-22	-3.4%		
Textile Knitting and Weaving Machine Setters, Operators, and Tenders	63	\$29,200	0.26	2	2.4%	1	0.3%	-3.6%	-1.4%	5	29	-21	-3.9%		
Textile Winding, Twisting, and Drawing Out Machine Setters, Operators, and Tenders	62	\$28,900	0.21	1	2.3%	-9	-2.6%	-1.8%	0.2%	0	22	-15	-2.8%		
Extruding and Forming Machine Setters, Operators, and Tenders, Synthetic and Glass Fibers	140	\$36,400	0.72	9	6.2%	8	1.1%	1.3%	1.1%	0	34	-21	-1.6%		
Fabric and Apparel Patternmakers	36	\$39,500	0.72	1	4.1%	-9	-4.5%	-3.3%	-1.2%	2	12	-10	-3.4%		
Upholsterers	239	\$32,800	0.55	4	1.6%	1	0.1%	0.4%	1.3%	4	87	-19	-0.8%		
Textile, Apparel, and Furnishings Workers, All Other	118	\$31,900	0.87	8	6.5%	-10	-1.5%	-0.2%	0.4%	0	26	-17	-1.5%		
Cabinetmakers and Bench Carpenters	661	\$37,800	0.69	22	3.2%	24	0.7%	2.6%	2.9%	4	64	-32	-0.5%		
Furniture Finishers	88	\$36,100	0.49	3	3.6%	2	0.4%	1.8%	2.5%	4	18	-6	-0.8%		
Model Makers, Wood	13	\$48,800	0.62	0	n/a	1	1.1%	-0.1%	0.9%	0	6	-2	-1.3%		
Patternmakers, Wood	11	\$49,200	0.65	0	n/a	-1	-1.1%	-0.8%	1.0%	0	5	-1	-0.6%		
Sawing Machine Setters, Operators, and Tenders, Wood	163	\$27,700	0.33	8	3.9%	6	0.7%	0.9%	2.3%	4	54	-9	-0.6%		
Woodworking Machine Setters, Operators, and Tenders, Except Sawing	225	\$27,500	0.32	12	4.5%	19	1.8%	2.2%	3.0%	3	42	-18	-0.8%		
Woodworkers, All Other	58	\$23,400	0.48	2	3.1%	0	0.1%	1.5%	2.2%	2	20	-3	-0.6%		
Nuclear Power Reactor Operators	15	\$93,900	0.22	0	n/a	-4	-4.6%	-2.7%	-2.0%	0	5	-1	-0.5%		
Power Distributors and Dispatchers	75	\$83,200	0.63	0	n/a	-4	-1.2%	-0.5%	0.1%	1	24	-9	-1.3%		
Power Plant Operators	269	\$70,800	0.75	2	0.7%	-77	-4.9%	-1.8%	-0.4%	0	119	-36	-1.4%		
Stationary Engineers and Boiler Operators	280	\$64,300	0.86	5	1.8%	6	0.4%	0.3%	0.8%	1	77	-4	-0.2%		
Water and Wastewater Treatment Plant and System Operators	1,133	\$49,000	1.05	57	4.8%	-20	-0.4%	0.3%	0.6%	23	299	56	0.5%		
Chemical Plant and System Operators	501	\$59,800	1.58	13	2.7%	44	1.9%	1.0%	0.5%	1	242	-76	-1.6%		
Gas Plant Operators	91	\$61,500	0.57	4	4.1%	0	0.1%	-0.3%	0.3%	0	52	-14	-1.6%		
Petroleum Pump System Operators, Refinery Operators, and Gaugers	428	\$56,300	1.09	14	3.2%	21	1.0%	1.9%	-0.2%	0	182	-37	-0.9%		
Plant and System Operators, All Other	98	\$56,900	0.85	4	3.8%	4	0.7%	0.2%	0.3%	0	36	-9	-0.9%		
Chemical Equipment Operators and Tenders	1,008	\$47,000	1.48	19	1.9%	69	1.4%	1.3%	0.5%	3	445	-145	-1.5%		
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	639	\$43,000	1.42	13	2.0%	8	0.3%	1.1%	2.6%	0	229	-39	-0.6%		
Crushing, Grinding, and Polishing Machine Setters, Operators, and Tenders	229	\$36,500	0.80	10	3.9%	20	1.8%	0.6%	1.0%	9	53	-28	-1.3%		
Grinding and Polishing Workers, Hand	255	\$34,000	1.00	11	4.1%	3	0.3%	1.4%	1.0%	1	55	-32	-1.3%		
Mixing and Blending Machine Setters, Operators, and Tenders	1,656	\$43,100	1.37	67	4.0%	147	1.9%	1.7%	1.4%	14	418	-173	-1.1%		
Cutters and Trimmers, Hand	111	\$26,600	0.80	5	4.6%	-5	-0.8%	-0.2%	0.6%	3	42	-21	-2.1%		
Cutting and Slicing Machine Setters, Operators, and Tenders	571	\$36,600	0.97	27	4.5%	16	0.6%	-0.3%	0.9%	13	174	-73	-1.4%		
Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	787	\$31,600	1.19	23	2.9%	95	2.6%	0.9%	1.5%	0	278	-136	-1.9%		
Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders	149	\$42,200	0.84	7	4.4%	1	0.1%	-0.9%	1.0%	0	45	-23	-1.6%		
Inspectors, Testers, Sorters, Samplers, and Weighers	4,363	\$44,000	0.92	229	5.0%	309	1.5%	1.6%	1.1%	105	1,126	-264	-0.6%		
Jewelers and Precious Stone and Metal Workers	292	\$45,600	0.73	6	2.2%	17	1.2%	-0.4%	0.0%	4	118	-45	-1.6%		

## Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT				HISTORICAL 2012-2017				FORECAST				
	PAST 4 QUARTERS		Q2 2017		TOTAL	AVG ANNUAL CHANGE			NEXT TEN YEARS				
	EMPL	AVG. ANNUAL WAGES <sup>1</sup>	LOCATION QUOTIENT	UNEMPL		UNEMPL RATE	ST. LOUIS, MO-IL MSA	MISSOURI	USA	CURRENT ONLINE JOB ADS <sup>2</sup>	TOTAL REPL DEMAND	TOTAL ANNUAL GROWTH %	
Dental Laboratory Technicians	322	\$38,500	0.88	6	1.8%	-41	-2.4%	0.2%	0.3%	11	81	16	0.5%
Medical Appliance Technicians	114	\$43,400	0.74	2	1.6%	-4	-0.6%	0.9%	0.9%	11	32	4	0.3%
Ophthalmic Laboratory Technicians	283	\$33,100	0.94	5	1.7%	5	0.3%	1.1%	1.4%	5	65	0	0.0%
Packaging and Filling Machine Operators and Tenders	3,211	\$35,600	0.91	295	8.4%	226	1.5%	1.4%	2.1%	17	1,141	-171	-0.5%
Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	442	\$34,000	0.54	20	4.2%	6	0.3%	0.5%	0.7%	3	98	-29	-0.7%
Painters, Transportation Equipment	732	\$49,300	1.34	34	4.5%	112	3.4%	2.8%	2.5%	13	151	2	0.0%
Painting, Coating, and Decorating Workers	195	\$32,200	1.29	10	5.1%	11	1.2%	0.7%	1.6%	2	38	-17	-0.9%
Semiconductor Processors	94	\$38,900	0.39	5	5.0%	-26	-4.9%	11.1%	-0.9%	2	53	-8	-0.9%
Photographic Process Workers and Processing Machine Operators	280	\$32,200	1.16	31	10.2%	16	1.2%	1.6%	1.4%	3	30	-94	-4.0%
Adhesive Bonding Machine Operators and Tenders	157	\$32,500	0.99	5	3.3%	2	0.2%	0.3%	1.4%	1	42	-20	-1.4%
Cleaning, Washing, and Metal Pickling Equipment Operators and Tenders	125	\$31,300	0.68	15	10.7%	3	0.5%	0.4%	1.1%	1	39	-7	-0.6%
Cooling and Freezing Equipment Operators and Tenders	52	\$33,000	0.61	4	7.5%	1	0.2%	0.6%	1.6%	0	11	-3	-0.6%
Etchers and Engravers	102	\$36,200	1.04	5	4.9%	1	0.2%	0.7%	0.7%	3	32	-9	-1.0%
Molders, Shapers, and Casters, Except Metal and Plastic	443	\$35,400	1.02	12	2.6%	35	1.7%	0.6%	1.7%	1	187	-45	-1.1%
Paper Goods Machine Setters, Operators, and Tenders	586	\$38,600	0.69	15	2.5%	-112	-3.4%	-2.0%	-0.6%	0	123	-81	-1.5%
Tire Builders	251	\$43,400	1.19	4	1.7%	67	6.4%	-0.3%	1.0%	0	87	-47	-2.0%
Helpers — Production Workers	3,456	\$26,400	0.90	300	8.0%	194	1.2%	0.9%	1.6%	3	1,043	-311	-0.9%
Production Workers, All Other	2,781	\$35,100	1.14	201	6.6%	361	2.8%	2.0%	2.1%	367	560	-56	-0.2%
Aircraft Cargo Handling Supervisors	162	\$51,300	2.25	2	1.5%	27	3.7%	3.5%	2.7%	2	44	-14	-0.9%
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	1,690	\$48,200	0.98	31	1.8%	221	2.8%	1.9%	2.9%	3	523	-53	-0.3%
First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators	1,728	\$54,200	0.92	37	2.1%	97	1.2%	1.4%	2.1%	34	525	-55	-0.3%
Airline Pilots, Copilots, and Flight Engineers	109	\$100,200	0.14	2	1.7%	16	3.2%	1.5%	1.1%	2	37	-7	-0.6%
Commercial Pilots	383	\$80,800	0.95	7	1.8%	24	1.3%	1.0%	0.7%	21	109	11	0.3%
Air Traffic Controllers	112	\$110,900	0.64	3	2.1%	-2	-0.4%	-0.8%	0.1%	1	31	-14	-1.3%
Airfield Operations Specialists	79	\$37,000	0.96	1	0.9%	5	1.3%	0.1%	1.8%	7	24	-2	-0.2%
Flight Attendants	853	\$53,600	0.76	4	0.5%	126	3.2%	2.6%	1.1%	4	237	-50	-0.6%
Ambulance Drivers and Attendants, Except Emergency Medical Technicians	146	\$21,400	0.82	12	7.5%	12	1.8%	1.7%	1.6%	1	25	42	2.6%
Bus Drivers, Transit and Intercity	2,077	\$38,500	1.00	68	3.2%	19	0.2%	0.9%	1.3%	18	257	-41	-0.2%
Bus Drivers, School or Special Client	5,688	\$30,500	1.24	246	4.2%	-82	-0.3%	0.7%	1.4%	46	748	8	0.0%
Driver/Sales Workers	4,246	\$28,800	1.00	161	3.7%	242	1.2%	1.5%	2.2%	489	763	-79	-0.2%
Heavy and Tractor-Trailer Truck Drivers	15,370	\$47,300	0.90	525	3.3%	364	0.5%	1.0%	1.8%	1,732	2,810	27	0.0%
Light Truck or Delivery Services Drivers	8,526	\$37,600	0.99	283	3.2%	649	1.6%	1.7%	2.4%	111	1,586	-296	-0.4%
Taxi Drivers and Chauffeurs	1,757	\$25,200	0.79	63	3.5%	187	2.3%	2.5%	4.1%	143	404	-45	-0.3%
Motor Vehicle Operators, All Other	473	\$32,600	0.90	32	6.3%	31	1.4%	1.8%	2.4%	4	139	19	0.4%
Locomotive Engineers	351	\$63,300	1.02	0	n/a	-43	-2.3%	-1.7%	-1.6%	1	158	-31	-0.9%
Locomotive Firefs	10	\$66,100	1.04	0	n/a	-1	-2.3%	-1.7%	-1.7%	0	8	-7	-1.6%
Rail Yard Engineers, Dinkey Operators, and Hostlers	69	\$54,300	1.55	0	n/a	-2	-0.6%	-1.0%	0.8%	6	20	-2	-0.3%

# Q2 2017 Occupation Snapshot – All Jobs

ST. LOUIS MSA

TITLE	CURRENT					HISTORICAL 2012-2017					FORECAST				
	PAST 4 QUARTERS			Q2 2017		TOTAL	AVG ANNUAL CHANGE			CURRENT ONLINE JOB ADS <sup>6</sup>	NEXT TEN YEARS			AVG. ANNUAL GROWTH %	
	EMPL	AVG. ANNUAL WAGES <sup>5</sup>	LOCATION QUOTIENT	UNEMPL	UNEMPL RATE		EMPL	ST. LOUIS, MO-IL MSA	MISSOURI		USA	TOTAL REPL DEMAND	TOTAL GROWTH DEMAND		
Railroad Brake, Signal, and Switch Operators	196	\$57,400	118	0	n/a	-18	-1.8%	-1.6%	-1.1%	0	69	-13	-0.7%		
Railroad Conductors and Yardmasters	411	\$60,400	0.88	2	0.4%	-48	-2.2%	-1.7%	-1.3%	1	169	-35	-0.9%		
Subway and Streetcar Operators	74	\$64,700	0.51	2	2.4%	1	0.3%	0.6%	1.1%	1	37	-1	-0.2%		
Rail Transportation Workers, All Other	46	\$61,700	0.78	0	n/a	-1	-0.6%	-0.7%	0.0%	1	21	-2	-0.4%		
Sailors and Marine Oilers	213	\$51,200	0.70	11	4.9%	6	0.6%	0.4%	0.2%	1	47	10	0.5%		
Captains, Mates, and Pilots of Water Vessels	227	\$93,400	0.62	7	2.8%	6	0.6%	0.4%	0.2%	6	95	15	0.7%		
Motorboat Operators	21	\$45,000	0.54	1	4.0%	0	0.4%	2.9%	1.3%	0	12	0	0.2%		
Ship Engineers	47	\$76,600	0.46	4	7.9%	0	0.0%	0.0%	0.0%	0	11	1	0.2%		
Bridge and Lock Tenders	36	\$62,400	1.00	4	9.6%	-2	-1.0%	-0.5%	0.0%	0	17	-2	-0.7%		
Parking Lot Attendants	1,514	\$20,800	1.06	65	4.2%	92	1.3%	2.4%	4.0%	51	853	-30	-0.2%		
Automotive and Watercraft Service Attendants	1,016	\$26,100	0.99	60	5.6%	131	2.8%	3.1%	2.7%	6	371	61	0.6%		
Traffic Technicians	36	\$50,500	0.60	3	7.2%	2	1.3%	1.0%	0.8%	1	18	1	0.2%		
Transportation Inspectors	229	\$80,700	0.85	11	4.4%	4	0.3%	0.2%	0.9%	10	57	-9	-0.4%		
Transportation Attendants, Except Flight Attendants	181	\$32,200	0.89	9	4.7%	1	0.1%	0.7%	1.6%	14	22	-2	-0.1%		
Transportation Workers, All Other	160	\$42,500	0.44	6	3.3%	13	1.7%	0.5%	1.8%	4	85	-6	-0.4%		
Conveyor Operators and Tenders	348	\$32,700	1.24	39	10.0%	48	3.0%	1.2%	1.3%	4	98	-19	-0.5%		
Crane and Tower Operators	393	\$56,700	0.91	24	5.8%	10	0.5%	1.2%	1.5%	3	133	5	0.1%		
Dredge Operators	15	\$48,300	0.82	1	7.9%	1	1.4%	-0.1%	0.8%	2	3	1	0.7%		
Excavating and Loading Machine and Dragline Operators	463	\$41,300	0.90	32	6.5%	33	1.5%	0.9%	0.8%	0	61	19	0.4%		
Loading Machine Operators, Underground Mining	12	\$53,200	0.45	1	6.2%	1	1.6%	-1.7%	-5.9%	0	2	-1	-0.9%		
Hoist and Winch Operators	26	\$51,900	0.95	1	4.6%	-1	-1.0%	0.3%	-0.3%	1	6	-2	-0.9%		
Industrial Truck and Tractor Operators	4,272	\$34,200	0.84	190	4.3%	560	2.9%	2.1%	3.3%	97	1,232	-113	-0.3%		
Cleaners of Vehicles and Equipment	3,422	\$21,400	1.00	290	7.9%	288	1.8%	1.8%	2.7%	96	1,294	143	0.4%		
Laborers and Freight, Stock, and Material Movers, Hand	23,340	\$31,800	0.97	2,342	9.2%	2,898	2.7%	1.8%	2.7%	609	7,364	-202	-0.1%		
Machine Feeders and Offbearers	414	\$37,800	0.51	36	7.6%	28	1.4%	0.6%	2.0%	6	85	-38	-1.0%		
Packers and Packers, Hand	5,404	\$23,700	0.83	556	9.4%	581	2.3%	1.9%	2.6%	100	1,446	-120	-0.2%		
Gas Compressor and Gas Pumping Station Operators	21	\$61,900	0.53	1	2.6%	-1	-0.7%	-0.2%	-0.3%	1	12	-2	-1.2%		
Pump Operators, Except Wellhead Pumps	67	\$49,700	0.55	2	2.2%	2	0.7%	0.8%	-2.6%	0	35	-1	-0.2%		
Wellhead Pumps	6	\$52,600	0.06	0	n/a	0	-1.4%	-3.2%	-3.2%	0	3	0	0.6%		
Refuse and Recyclable Material Collectors	924	\$33,800	0.80	100	9.8%	50	1.1%	0.3%	1.4%	6	238	39	0.4%		
Mine Shuttle Car Operators	9	\$58,500	0.58	1	9.4%	1	2.3%	-4.2%	-9.9%	0	3	-1	-1.2%		
Tank Car, Truck, and Ship Loaders	100	\$41,100	0.91	6	6.2%	6	1.4%	1.7%	1.8%	1	32	-3	-0.3%		
Material Moving Workers, All Other	189	\$30,500	0.78	12	6.2%	17	1.9%	1.9%	2.5%	1	49	5	0.3%		
Total – All Occupations	1,400,193	\$48,200	1.00	n/a	n/a	73,751	1.1%	1.2%	1.7%	58,189	356,168	13,892	0.1%		

Source: JobsEQ®  
 Data as of 2017Q2 unless noted otherwise  
 Note: Figures may not sum due to rounding.  
 5 Occupation wages are as of 2016 and should be taken as the average for all Covered Employment.  
 6 Data represent found online ads active within the last thirty days in any zip code intersecting or within the selected region; data represents a sampling rather than the complete universe of postings.  
 Exported on: Friday, October 6, 2017 12:22 PM



A woman with long brown hair, wearing a blue long-sleeved shirt and dark pants, is sitting in a wooden chair at a small wooden table in a library. She is writing in a notebook. A green bag is on the floor next to her. The library has tall wooden bookshelves filled with books on both sides. Large windows in the background let in bright sunlight, creating a warm atmosphere.

# **LABOR FORCE/ EDUCATION**



# LABOR FORCE

## *Education Institutions*

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*“I like moving the dial. You can always do great things along the margins, but in St. Louis our colleges and universities really move the needle.*

*A great institution like Washington University attracts talent from all over. We train that talent in a rigorous fashion. Our graduates, coupled with talent from other institutions in the region, create a tremendous workforce pipeline.*

*The depth of dynamic talent and great quality of life here make St. Louis a very attractive market for employers and students alike.”*

– Dedric Carter

Vice Chancellor for Operation and Technology Transfer  
and Professor of Engineering Practice  
Washington University in St. Louis





## Is St. Louis' workforce pipeline aligned to meet our future needs?

Absolutely. In 2016, more than 44,000 students earned certificates and degrees at nearly 50 St. Louis colleges and universities in the St. Louis MSA. More than 11,000 of these graduates earned degrees in areas aligned with the needs of Amazon: business/management, accounting, administration, law/legal and IT.

An additional 4,500 students graduated with Amazon-aligned degrees from three more schools within the University of Missouri system. In addition, St. Louis' central location makes it possible to recruit from many more nationally ranked colleges and universities in the plains and great lakes regions as well as states from the southeast that are contiguous to Missouri.

From the classroom to the board room, the St. Louis region has the infrastructure to train technical and managerial talent for Amazon from Day One.

# Educational Completions Higher Education Programs

St. Louis, MO-IL MSA

## Selected Classification of Instructional Program (CIP) Codes

Accounting  
Administration  
Executive Management  
IT  
Legal

Emsi Q3 2017 Data Set

September 2017

## St. Louis Community College



St. Louis Community College  
Expanding Minds. Changing Lives.

### Data Sources and Calculations

#### Completers Data

The completers data in this report is taken directly from the national IPEDS database published by the U.S. Department of Education's National Center for Education Statistics.

#### Institution Data

The institution data in this report is taken directly from the national IPEDS database published by the U.S. Department of Education's National Center for Education Statistics.



## Summary – Educational Completions – St. Louis MSA

All selected CIP codes: Accounting, Administration, Executive Management, IT and Legal

Institution	Total Completions (2014)	Total Completions (2015)	Total Completions (2016)
Webster University	4,368	4,117	3,813
Washington University in St Louis	1,391	1,476	1,681
Lindenwood University	1,063	1,059	1,216
Saint Louis University	939	944	853
University of Missouri-St Louis	755	774	787
Southern Illinois University-Edwardsville	599	549	541
McKendree University	298	309	361
Fontbonne University	228	222	199
Maryville University of Saint Louis	215	186	242
University of Phoenix-Missouri	175	153	128
Missouri Baptist University	166	174	172
Southwestern Illinois College	224	200	174
Saint Louis Community College	230	188	173
Lewis and Clark Community College	148	187	180
Greenville College	85	74	74
ITT Technical Institute-Earth City	70	70	0
Harris-Stowe State University	59	46	55
Hickey College	75	65	54
St Charles Community College	67	54	68
ITT Technical Institute-Arnold	45	50	0
Vatterott College-Berkeley	63	54	41
Ranken Technical College	60	63	56
Blackburn College	33	39	23
Jefferson College	48	46	50
Vatterott College-Sunset Hills	52	34	25
East Central College	30	25	12
Principia College	23	27	25
Brown Mackie College-St Louis	24	21	16
Sanford-Brown College-Fenton	19	0	0
Vatterott College-St Charles	32	26	14
Vatterott College-Fairview Heights	11	17	9
Stevens-The Institute of Business & Arts	10	16	7
The Art Institute of St Louis	9	19	27
Sanford-Brown College-Collinsville	8	0	0
CALC Institute of Technology	8	6	8
Court Reporting Institute of St Louis	6	16	24
Metro Business College-Arnold	8	0	0
Missouri College	4	0	0
American Trade School	3	7	4
National American University-Weldon Spring	2	3	0
Missouri Tech	2	0	0
<b>TOTALS</b>	<b>11,655</b>	<b>11,316</b>	<b>11,112</b>



## Accounting - Educational Completions – St. Louis MSA

See Appendix A for list of CIP codes

Institutions with completions in the last 14 years	Total Completions		
32	2014 1,143	2015 1,065	2016 1,193

### Regional Completions (Degrees and Certificates) by Institution

Institution	Total Completions (2014)	Total Completions (2015)	Total Completions (2016)
Washington University in St Louis	276	284	300
Lindenwood University	105	98	168
University of Missouri-St Louis	137	135	121
Webster University	119	98	117
Southern Illinois University-Edwardsville	139	110	105
Lewis and Clark Community College	59	51	76
Maryville University of Saint Louis	44	42	50
Saint Louis University	40	32	46
Saint Louis Community College	50	58	41
McKendree University	28	19	36
Missouri Baptist University	26	19	32
Fontbonne University	25	24	24
University of Phoenix-Missouri	12	16	19
St Charles Community College	13	6	13
Southwestern Illinois College	14	14	12
Harris-Stowe State University	20	12	11
Jefferson College	12	9	8
Hickey College	2	9	5
Blackburn College	5	11	3
East Central College	5	7	3
Greenville College	5	7	3
Brown Mackie College-St Louis	2	3	0
National American University-Weldon Spring	0	1	0
Metro Business College-Arnold	3	0	0
Sanford-Brown College-Fenton	2	0	0
<b>TOTALS</b>	<b>1,143</b>	<b>1,065</b>	<b>1,193</b>

## Administration

See Appendix A for list of CIP codes

Institutions with completions in the last 14 years	Total Completions		
<b>31</b>	<b>2014</b> 1,694	<b>2015</b> 1,581	<b>2016</b> 1,534

### Regional Completions (Degrees and Certificates) by Institution

Institution	Total Completions (2014)	Total Completions (2015)	Total Completions (2016)
Webster University	930	937	755
Lindenwood University	230	163	262
Washington University in St Louis	132	109	136
Greenville College	63	38	43
Fontbonne University	51	45	37
McKendree University	47	60	64
Southwestern Illinois College	47	47	45
Saint Louis University	26	33	51
Hickey College	33	27	20
Saint Louis Community College	21	7	4
Southern Illinois University-Edwardsville	19	13	14
Lewis and Clark Community College	19	38	17
St Charles Community College	16	7	15
University of Phoenix-Missouri	11	15	14
Maryville University of Saint Louis	9	9	14
Blackburn College	8	4	6
CALC Institute of Technology	8	6	8
East Central College	7	1	0
Jefferson College	4	6	11
Metro Business College-Arnold	5	0	0
Missouri College	3	0	0
University of Missouri-St Louis	3	5	10
Missouri Baptist University	2	9	5
Sanford-Brown College-Collinsville	0	0	0
Sanford-Brown College-Hazelwood	0	0	0
University of Phoenix-St Louis Campus	0	0	0
Brown Mackie College-St Louis	0	2	3
Saint Louis Community College-Florissant Valley	0	0	0
Sanford-Brown College-Fenton	0	0	0
Saint Louis Community College-Meramec	0	0	0
Stevens-The Institute of Business & Arts	0	0	0
	<b>1,694</b>	<b>1,581</b>	<b>1,534</b>



## Executive Management

See Appendix A for list of CIP codes

Institutions with completions in the last 14 years	Total Completions		
<b>39</b>	<b>2014</b> 6,457	<b>2015</b> 6,345	<b>2016</b> 6,088

### Regional Completions (Degrees and Certificates) by Institution

Institution	Total Completions (2014)	Total Completions (2015)	Total Completions (2016)
Webster University	2,857	2,648	2,559
Lindenwood University	641	678	643
Saint Louis University	542	608	546
University of Missouri-St Louis	538	522	549
Washington University in St Louis	469	511	469
Southern Illinois University-Edwardsville	292	302	264
McKendree University	201	208	246
Fontbonne University	150	149	132
University of Phoenix-Missouri	146	115	88
Missouri Baptist University	137	144	134
Maryville University of Saint Louis	130	116	167
Ranken Technical College	60	34	26
Harris-Stowe State University	33	29	39
Hickey College	31	20	19
Saint Louis Community College	32	22	21
Jefferson College	24	23	31
ITT Technical Institute-Earth City	19	15	0
Vatterott College-Sunset Hills	18	13	14
Principia College	17	21	19
Vatterott College-Berkeley	16	30	27
East Central College	16	15	8
Blackburn College	15	19	12
Greenville College	12	29	28
Sanford-Brown College-Fenton	11	0	0
Brown Mackie College-St Louis	11	10	5
Sanford-Brown College-Collinsville	8	0	0
ITT Technical Institute-Arnold	8	8	0
Stevens-The Institute of Business & Arts	8	15	5
Lewis and Clark Community College	10	28	34
St Charles Community College	3	2	2
Missouri College	1	0	0
National American University-Weldon Spring	1	2	0
Vatterott College-St Charles	0	9	1
	<b>6,457</b>	<b>6,345</b>	<b>6,088</b>



## Information Technology

See Appendix A for list of CIP codes

Institutions with completions in the last 14 years	Total Completions		
<b>44</b>	<b>2014</b> 1,511	<b>2015</b> 1,516	<b>2016</b> 1,433

### Regional Completions (Degrees and Certificates) by Institution

Institution	Total Completions (2014)	Total Completions (2015)	Total Completions (2016)
Webster University	410	391	331
Washington University in St Louis	178	190	282
Southern Illinois University-Edwardsville	149	124	158
Lindenwood University	87	120	143
University of Missouri-St Louis	77	112	107
Southwestern Illinois College	129	92	78
Saint Louis University	52	63	61
ITT Technical Institute-Earth City	50	55	0
ITT Technical Institute-Arnold	37	42	0
Saint Louis Community College	56	51	45
St Charles Community College	35	39	38
Vatterott College-Berkeley	47	24	14
McKendree University	22	22	15
Vatterott College-Sunset Hills	34	21	9
Lewis and Clark Community College	31	27	28
Vatterott College-St Charles	32	17	13
Maryville University of Saint Louis	16	12	8
Vatterott College-Fairview Heights	10	17	9
The Art Institute of St Louis	9	19	27
Brown Mackie College-St Louis	6	3	5
University of Phoenix-Missouri	6	7	7
Principia College	6	6	6
Harris-Stowe State University	6	5	5
Blackburn College	5	5	2
Greenville College	5	0	0
Jefferson College	5	8	0
American Trade School	3	7	4
Missouri Tech	2	0	0
East Central College	2	2	1
Fontbonne University	2	4	6
Missouri Baptist University	1	2	1
National American University-Weldon Spring	1	0	0
Ranken Technical College	0	29	30
	<b>1,511</b>	<b>1,516</b>	<b>1,433</b>

## Law/Legal

See Appendix A for list of CIP codes

Institutions with completions in the last 14 years	Total Completions		
	2014	2015	2016
<b>22</b>	850	809	864

### Regional Completions (Degrees and Certificates) by Institution

Institution	Total Completions (2014)	Total Completions (2015)	Total Completions (2016)
Washington University in St Louis	336	382	494
Saint Louis University	279	208	149
Webster University	52	43	51
Saint Louis Community College	71	50	62
Southwestern Illinois College	34	47	39
Lewis and Clark Community College	29	43	25
Maryville University of Saint Louis	16	7	3
Hickey College	9	9	10
Sanford-Brown College-Fenton	6	0	0
Court Reporting Institute of St Louis	6	16	24
Brown Mackie College-St Louis	5	3	3
Jefferson College	3	0	0
Stevens-The Institute of Business & Arts	2	1	2
Vatterott College-Fairview Heights	1	0	0
ITT Technical Institute-Earth City	1	0	0
Vatterott College-Sunset Hills	0	0	2
ITT Technical Institute-Arnold	0	0	0
Sanford-Brown College-St Peters	0	0	0
Sanford-Brown College-Hazelwood	0	0	0
East Central College	0	0	0
	<b>850</b>	<b>809</b>	<b>864</b>



## Appendix A - Regional Program Completions for Selected Programs by CIP Code

### Accounting

CIP Code	Program	Regional Completions (2014)	Regional Completions (2015)	Regional Completions (2016)
52.03	Accounting and Related Services	801	752	799
52.08	Finance and Financial Management Services	342	313	394
<b>TOTALS</b>		<b>1,143</b>	<b>1,065</b>	<b>1,193</b>

### Administration

CIP Code	Program	Regional Completions (2014)	Regional Completions (2015)	Regional Completions (2016)
11.03	Data Processing	1	2	2
11.06	Data Entry/Microcomputer Applications	21	7	4
52.04	Business Operations Support and Assistant Services	106	111	90
52.1	Human Resources Management and Services	1,263	1,216	1,109
52.14	Marketing	283	232	318
52.99	Business, Management, Marketing, and Related Support Services, Other	20	13	11
<b>TOTALS</b>		<b>1,694</b>	<b>1,581</b>	<b>1,534</b>

### Executive Management

CIP Code	Program	Regional Completions (2014)	Regional Completions (2015)	Regional Completions (2016)
52.01	Business/Commerce, General	1,280	1,339	1,280
52.02	Business Administration, Management and Operations	5,025	4,834	4,610
52.11	International Business	86	69	82
52.13	Management Sciences and Quantitative Methods	66	103	116
<b>TOTALS</b>		<b>6,457</b>	<b>6,345</b>	<b>6,088</b>

Appendix A - Regional Program Completions for Selected Programs by CIP Code - 31



## Information Technology

CIP Code	Program	Regional Completions (2014)	Regional Completions (2015)	Regional Completions (2016)
11.01	Computer and Information Sciences, General	216	222	256
11.02	Computer Programming	95	92	98
11.04	Information Science/Studies	8	8	6
11.05	Computer Systems Analysis	4	11	21
11.07	Computer Science	273	297	332
11.08	Computer Software and Media Applications	98	109	128
11.10	Computer/Information Technology Administration and Management	282	261	198
14.09	Computer Engineering	28	31	34
52.12	Management Information Systems and Services	507	485	360
<b>TOTALS</b>		<b>1,511</b>	<b>1,516</b>	<b>1,433</b>

## Legal

CIP Code	Program	Regional Completions (2014)	Regional Completions (2015)	Regional Completions (2016)
22.01	Law	530	428	375
22.02	Legal Research and Advanced Professional Studies	85	163	268
22.03	Legal Support Services	235	218	221
<b>TOTALS</b>		<b>850</b>	<b>809</b>	<b>864</b>

<b>TOTALS FOR SELECTED CIP CODES</b>		<b>11,655</b>	<b>11,316</b>	<b>11,112</b>
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## St. Louis has a Robust Network of Colleges and Universities

The St. Louis region's options for higher education are remarkably diverse, and include: the most selective and prestigious university in Missouri, Washington University in St. Louis; the second oldest Jesuit university in the country, St. Louis University; and the only Historically Black University in the Metro area, Harris-Stowe State University. In addition, there are 15 two-year community and vocational schools that provide a range of accelerated training programs.

Beyond the network of colleges and universities within the St. Louis region, the University of Missouri System is also a potential partner of significance for Amazon. The four-campus university system started in Columbia (MU) and includes additional campuses in Kansas City (UMKC), Rolla (Missouri S&T), and St. Louis (UMSL). The University System's combined research and land-grant institutions make it unique.

The opposite page provides detail regarding the number of graduates with Amazon-aligned degrees for each University of Missouri campus for the past three years.





# University of Missouri System

## Selected Classification of Instructional Programs

INSTITUTION	PROGRAMS	2014						2015						2016						TOTAL
		UNDERGRAD CERTIFICATE	BACHELORS	GRADUATE CERTIFICATE	MASTERS	POST MASTERS CERTIFICATE	DOCTORAL	UNDERGRAD CERTIFICATE	BACHELORS	GRADUATE CERTIFICATE	MASTERS	POST MASTERS CERTIFICATE	DOCTORAL	UNDERGRAD CERTIFICATE	BACHELORS	GRADUATE CERTIFICATE	MASTERS	POST MASTERS CERTIFICATE	DOCTORAL	
University of Missouri - Columbia	Computer and Information Sciences, General	.	63	.	25	.	6	.	77	.	28	.	5	.	52	.	17	.	2	275
	Information Technology	.	56	.	.	.	.	.	71	.	.	.	.	.	39	.	.	.	.	166
	Computer Engineering, General	.	26	.	6	.	.	.	39	.	6	.	.	.	25	.	8	.	.	110
	Business/Commerce, General	.	644	.	104	.	4	.	647	.	85	.	3	.	464	.	89	.	7	2047
	Nonprofit/Public/ Organizational Management	.	.	4	.	.	.	.	.	1	.	.	.	.	.	7	.	.	.	12
Missouri University of Science and Technology	Computer and Information Sciences, General	.	65	.	20	.	8	.	78	3	38	.	9	.	60	1	9	.	.	291
	Computer Systems Analysis/ Analyst	.	.	2	.	.	.	.	.	.	.	.	.	.	.	1	.	.	.	3
	Computer Science	.	.	2	.	.	.	.	.	4	.	.	.	.	.	.	.	.	.	6
	Computer and Information Systems Security/ Information Assurance	.	.	1	.	.	.	.	.	.	.	.	.	.	.	1	.	.	.	2
	Information Technology Project Management	.	.	.	.	.	.	.	.	1	.	.	.	.	.	1	.	.	.	2
	Computer Engineering, General	.	64	.	29	.	1	.	49	.	34	.	5	.	31	.	9	.	2	224
	Computer Engineering, Other	.	.	2	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	2
	Industrial and Organizational Psychology	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	1	.	.	1
	Business Administration and Management, General	.	.	1	15	.	.	.	.	.	18	.	.	.	.	1	14	.	.	49
University of Missouri - Kansas City	Information Technology	.	13	.	.	.	.	.	14	.	.	.	.	.	2	.	.	.	.	29
	Computer Science	.	24	.	82	.	.	.	37	.	136	.	.	.	25	.	43	.	.	347
	Geographic Information Science and Cartography	1	.	.	.	.	.	8	.	.	.	3	.	4	.	.	.	5	.	21
	Business/Commerce, General	.	248	.	135	.	.	.	260	.	120	.	.	.	112	.	71	.	.	946
	Entrepreneurial and Small Business Operations, Other	.	.	.	.	.	1	.	.	.	.	.	.	.	.	.	.	.	2	3
University of Missouri - St. Louis	Computer Science	.	24	.	15	.	.	.	30	.	7	.	.	.	19	.	5	.	.	100
	Accounting and Computer Science	.	.	.	.	.	.	.	.	.	.	3	.	.	.	.	.	6	.	9
	Business/Commerce, General	.	359	.	119	.	.	.	370	.	134	1	.	.	172	.	49	.	.	1204
	Business Administration and Management, General	.	.	.	.	.	7	.	.	.	.	.	3	.	.	.	.	.	1	11
	Logistics, Materials, and Supply Chain Management	.	.	.	.	8	.	.	.	.	.	10	.	.	.	.	.	3	.	21
	Nonprofit/Public/ Organizational Management	.	.	.	.	15	.	.	.	.	.	22	.	.	.	.	.	12	.	49
	Business Administration, Management and Operations, Other	.	.	.	.	9	.	.	.	.	.	4	.	.	.	.	.	.	.	13
	Human Resources Management/Personnel Administration, General	.	.	.	.	3	.	.	.	.	.	1	.	.	.	.	.	3	.	7
SUM		1	1586	12	550	35	27	8	1672	9	606	44	25	4	1001	12	315	29	14	5950



## Sampling of Programs and Partnerships Currently Available

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Taking investment in students further, regional colleges and universities have a demonstrated record of excellence working with corporations to develop blueprints for customized training programs and courses. St. Louis' education leaders would welcome conversations with Amazon about scaling up existing programs to develop more technical and executive talent. In addition, multiple nonprofits with national reputations are working with regional colleges and universities to fill the St. Louis tech talent pipeline, including LaunchCode, NPower, and GlobalHack.

### Co-Location of Fortune 500 and Public University

The University of Missouri – St. Louis (UMSL) is the only university with a Fortune 500 headquarters on its campus.

Since Express Scripts moved to UMSL in 2005, the partnership has become one of the largest business-university developments in the nation. One of four institutions in the University of Missouri system, UMSL is among the most culturally and ethnically diverse campuses in the state. UMSL's international undergraduate business program has been nationally ranked in the top 25 by U.S. News and World Report for 15 consecutive years.

The university offers several academic programs at the undergraduate and graduate levels for Express Scripts employees. In addition, faculty collaborate on joint research projects with teams at Express Scripts.

## Cybersecurity and Higher Education

Cybercrime is projected to cost \$6 trillion worldwide by 2021, and it's estimated there will be a global shortage of two million cybersecurity professionals by 2019. St. Louis area universities are investing in cybersecurity degree programs to address the massive need for new cybersecurity professionals, including the National Geospatial-Intelligence Agency, which has its western headquarters in St. Louis.

The University of Missouri – St. Louis is one of only two institutions in Missouri with the National Security Agency/Department of Homeland Security designation as a National Center of Academic Excellence in Cyber Defense Education.

In addition, Washington University and Saint Louis University both offer cybersecurity professional education programs, technology training services, and customized group training.

Webster University and Maryville University also offer graduate programs in cybersecurity, and Missouri S&T has a graduate certificate available, with plans underway to launch a Master of Science program. Southern Illinois University – Carbondale and St. Charles Community College include cybersecurity certificates in their degree offerings as well.

### Case Study: Maryville University

Maryville's new state-of-the-art Cyber Fusion Center is a student-run and faculty-managed security operation center. Services include penetration testing, vulnerability management, digital forensics and cyberthreat monitoring.

In addition, the school received a three-year \$435,000 grant from the PNC Foundation to create "Protect and Connect," a program that connects local tech startups with training and cybersecurity services at T-REX and Cortex.



## Unique Programs that Work to Improve Tech Talent Development in Partnership with Higher Education:

St. Louis has a number of unique programs that work to improve tech talent development in partnership with higher education, including: LaunchCode, NPower, and Midwest Cyber Center.

### Case Study: LaunchCode

LaunchCode has helped train more than 900 people for tech careers with free, open, and inclusive classes that have enrolled 2,576 people from around the country. LaunchCode's main educational program, LC101, is a 20-week, part-time, free program that quickly and effectively prepares workers for coding jobs. LaunchCode partners with Washington University, Webster University, Maryville University, and others in the region.

Deliberately built to be efficient and scalable, LaunchCode is prepared to ramp up its classes to help Amazon fill staffing needs by training up to 3,000 students per year.

### Case Study: NPower

NPower offers a free 22-week IT training and development program. The program prepares students to earn the CompTIA A+ certification, and pursue advanced coursework in cybersecurity, coding, and IT service management. The St. Louis location is on the campus of Harris-Stowe State University.

### Case Study: Midwest Cyber Center (MC<sup>2</sup>)

Midwest Cyber Center (MC<sup>2</sup>) was created to connect the corporate, government, and academic leaders in St. Louis' cyber ecosystem. Higher education partners include: St. Louis University, Washington University in St. Louis, Webster University, Lindenwood University, Maryville University, University of Missouri – St. Louis, Southwestern Illinois College, McKendree, Lewis and Clark Community College, and Fontbonne University.

# Sampling of Creative Programs with Higher Education Institutions in the Region

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Partnerships between universities and their surrounding communities offer advantages that go far beyond each other's shared geography. These are just a few of the creative programs with higher education in the region.

## University of Missouri – St. Louis and Washington University

For nearly 25 years, the University of Missouri – St. Louis and Washington University's School of Engineering & Applied Science have collaborated to offer an undergraduate engineering degree to nontraditional students in the St. Louis area.

## University of Missouri – St. Louis K–12 Computer Science Program

UMSL's Technology & Learning Center (TLC) and ED Collabitat have several programs and partnerships that feature computers, robots, and other technologies, including:

- A weekly "Girls' Tech" after-school program.
- The Eureka Program, an intensive summer collaboration for girls who want to pursue college majors in the STEM fields, including computer programming.
- A weekly tech program with the St. Louis Children's Hospital.
- The Science Center's program for youth interested in science. UMSL has cooperated in several projects with that organization, including software development projects.

In addition to these long-term projects, UMSL faculty, students, and staff also partner with Clearent (an annual educational hackathon), Code.org (the Day of Code), Express Scripts (the summer Bridge Program), Google (Made with Code), Mastercard (educational entrepreneurs at the Collabitat) and Microsoft (DigiGirlz).

## Washington University in St. Louis

Among the world's leaders in teaching, research, and patient care, Washington University is a hub of innovation that inspires entrepreneurs and supports research with global impact. Its partnerships in healthcare, and plant and life science, are detailed in Section 9 of this proposal.

Washington University, in collaboration with Cortex, hosts Stampedecon, a specialty conference held three to four times each year. Topics include artificial intelligence, big data, the Internet of Things, and others.

## Saint Louis University

The Saint Louis University (SLU) Parks College of Engineering, Aviation and Technology, was founded in 1927 to raise the standards of aviation education. The college has a long and ongoing tradition of collaboration with Boeing and other national aerospace companies and their suppliers.

SLU is a preferred school through Boeing's Learning Together Program and has trained over 1,000 IT professionals from Boeing. SLU offers total flexibility to corporate clients through custom content, day and night training, and virtual training options. Centene Corporation employees also receive private group training at SLU's workforce center.

To better meet the needs of its corporate partners, SLU recently created two new graduate programs: the Master of Science in Computer Science and Master of Science in Software Engineering.

## St. Charles Community College (SCCC)

St. Charles Community College's campus is approximately 40 minutes west of downtown St. Louis. As the fourth largest of Missouri's 12 community college districts, SCC serves around 11,100 students and offers 45 career programs in engineering, physics, mathematics, computer science, chemistry and biosciences, business, and more.

Its partnership with General Motors spans 30 years. As one of the largest employers in SCC's service area, the college offers mandated simulated work environment workshops for GM employees, as well as cross training.





For the past 19 years, GM and SCC have hosted the regional robotics competition for middle and high school students. More than 35 middle and 18 high schools now compete at the annual event. GM and SCC also host middle and high school educational Manufacturing Day and Career Expo events; more than 2,000 youth have participated in the programs the past five years.

### Ranken Technical College

In August, U.S. Secretary of Commerce Wilber Ross announced the department's Economic Development Administration (EDA) \$2.35 million grant to Ranken Technical College of St. Louis, in order to establish an incubator that supports the region's manufacturing sector by providing pre-apprentice and apprenticeship workforce training.

Their 18-acre campus is located in the heart of St. Louis and hosts over one million square feet of advanced technology laboratories. Offering both two- and four-year degrees, Ranken graduates over 1,000 highly skilled technicians each year.

Ranken's course offerings are designed in partnership with employers. Corporate partners include Emerson, Enterprise, and JM Family Enterprises. Degree programs include information technology, CCNP training, and computer networking.

### Linn State Technical College

Linn State Technical College is the first and only two-year technical college with a statewide mission devoted to technical education. Located 90 minutes west of St. Louis, the college confers 17 percent of the engineering/technology degrees and 26 percent of the industrial technician degrees earned in Missouri. Linn State has successful partnerships with many manufacturers, including Boeing, in addition to engaging more than 400 business and industry advisors in support of its programs.



## Initiatives to align employer needs with degree programs

Higher education institutions in the St. Louis area maintain ongoing dialogue with employers to design and ensure degree programs align with employer needs.

St. Louis' goal is to become a Top Ten region for educational attainment by 2025. Partners endorsing the collaboration include the St. Louis Higher Education Council, Business Leaders for Education, St. Louis Graduates, East-West Gateway Council of Governments, and the Black Leadership Roundtable.

The following initiatives track the employability of graduates:

- The Regional Chamber convenes a Talent Council, focused on demand in financial and information services, health science and services, and sustainable technologies. The Higher Education Council meets to respond to changing business needs in real time.
- The School of Business at the University of Missouri – St. Louis develops and analyzes surveys of the St. Louis business community regarding critical skills and related skills gaps. The results of this survey are shared widely throughout the region as a reference for educators and human resource professionals. UMSL uses the results to revise their courses and to develop new courses at both the undergraduate and graduate levels.
- St. Louis Community College publishes the State of St. Louis Workforce Report, which is a valuable resource for both employers and educators. The report is distributed annually.



# Sampling of Regional Creative Community Programs

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A number of community agencies are working to improve the development of technical talent through nontraditional training and placement programs, in order to serve residents who would not necessarily pursue a two- or four-year degree.

## Case Study: CoderGirl

CoderGirl is a LaunchCode Education program. It is a year-long tech-training program consisting of two, six-month cycles. CoderGirl provides professional mentors from companies like Climate Corporation, Asynchrone, and World Wide Technology.

## Case Study: Claim Academy

Claim Academy is a St. Louis-based developer boot camp that offers 12-week classes in Full Stack Java and .NET/C# programming. Claim Academy has a 95% placement rate. This program is an accredited and approved center for workforce development, as designated by the Missouri Workforce Development Board.

## Case Study: The St. Louis County Government

St. Louis County Government works with local university students to provide them with internship openings in information technology and cybersecurity. Students get firsthand experience while pursuing their academic degrees. Students are exposed to an IT infrastructure that supports over 3,500 local employees in multiple sites.

## Case Study: St. Louis Economic Development Partnership (SLEDP)

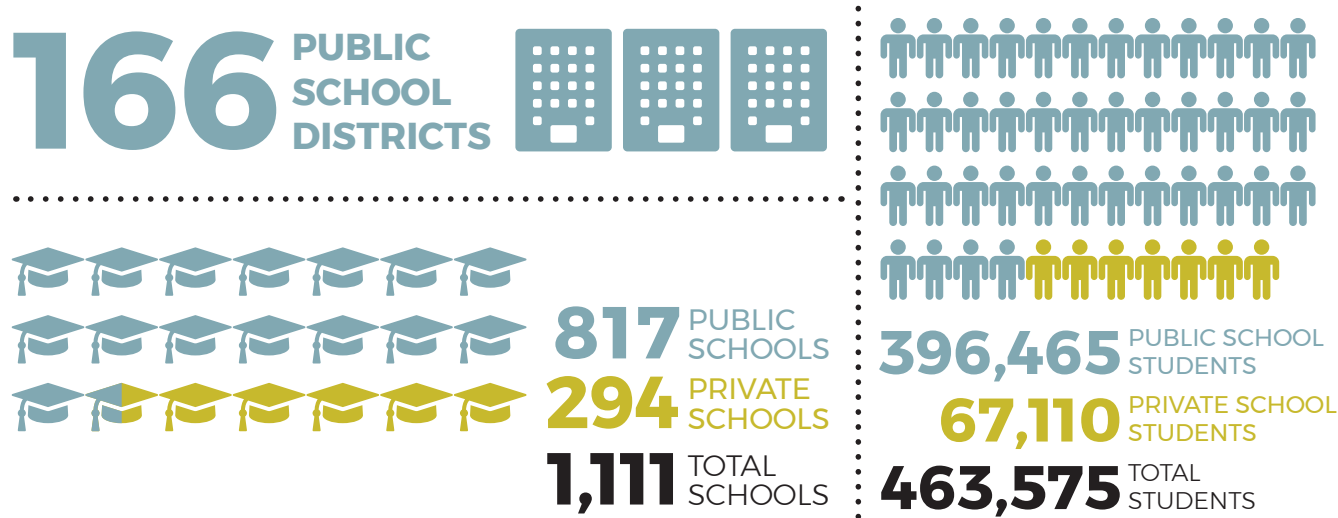
SLEDP is exploring new ways to engage with professionals who do not participate in traditional placement efforts. The partnership is pursuing collaborations with Gearbox Enterprise Academy and Better Weekdays:

- Gearbox Enterprise Academy is a new initiative taking shape in St. Louis that matches regional startups to corporate partners through an innovative tool called VentuRank. This new initiative is an exciting opportunity to improve the connectivity between St. Louis' established corporate partners and tech talent in the region.
- Better Weekdays, a St. Louis-based technology startup, matches top college talent with personalized career pathways at companies aligned with their strengths and values. Better Weekdays received investment from the Helix Fund, managed by SLEDP, and an additional investment from the St. Louis Development Corporation.



St. Louis has a robust network of K-12 Programs related to STEM and computer science.

St. Louis Metro Elementary and Secondary Education



Examples of K-12 Education Programs Related to Computer Science and STEM

Amazon has a unique opportunity in St. Louis to transform how we approach K-12 education. The one-size-fits-all approach is being challenged by educators and employers. In Missouri and Illinois, school districts maintain local control, resulting in more flexibility for partnerships with private entities like Amazon to help shape curricula and related programming, including virtual learning.

There is a density of St. Louis-area educators and reform advocates who are committed to shifting the focus of K-12 education from delivering outputs (test scores) to outcomes (real skills). Amazon could help accelerate reform efforts, inclusive of teacher training, to better prepare students for continuous learning.

Regionally, multiple private and public schools are working together with higher education to develop a pipeline of computer science and engineering talent in St. Louis. Some highlights include:

Case Study: Washington University in St. Louis Institute for School Partnership

The Institute for School Partnership connects school districts and teachers to the programs and services at Washington University. Teachers receive professional development, and access to resources to promote STEM education. Programs include “Novel Engineering,” which helps students develop skills in framing problems, engaging in conceptual planning, and realizing and testing their ideas.

Case Study: St. Louis Centers for Advanced Professional Studies

The St. Louis Centers for Advanced Professional Studies (STL CAPS) provides students with a unique, immersive experience, resulting in highly skilled, adaptable, global innovators and leaders. The STL CAPS technology solutions course immerses students in software engineering, web development, operating systems, hardware technologies, network design/technologies, management information systems, and emerging technologies. Discrete mathematics topics are embedded in the course. Students have mentors and work on client-based projects.

**Case Study:** Webster University's George Herbert Walker School of Business & Technology/Mastercard/Microsoft

Mastercard recently funded a program at Webster University for computer science students to support Microsoft's annual DigiGirlz event designed to give middle- and high-school girls an opportunity to learn about careers in technology and to participate in computer and technology workshops. Mastercard recently funded a program by the school to create the Cyber Explorers Workshop, which consists of interactive training sessions focused on stimulating interest in cybersecurity and computer science.

**Case Study:** Ranken Technical College/St. Louis Public Schools Partnership

Ranken and the St. Louis Public Schools are partnering to launch C3 – City Career College, designed to create career pathways for jobs in information technology and advanced manufacturing. Funded by a grant from the National Science Foundation, the program will start at the secondary level and allow students to earn an associate degree after only one year of post-secondary education. While tailored to the St. Louis market, it is expected to become a national model.

**Case Study:** Project Lead the Way (PLTW) – Computer Science Instruction in St. Louis

PLTW recently introduced curricula for middle and high school students that focuses on career areas of high-demand jobs, from application and software development and cybersecurity. Approximately 25 school districts in the St. Louis area have implemented the PLTW Computer Science Curriculum. The program aligns with the College Board for credit for the AP Computer Science Exam. St. Louis Community College has supported the project since its inception in 2005, by providing teacher training, student competitions, and college credit.

**Case Study:** St. Charles Community College (SCC)/General Motors (GM) Robotics Competition

For the past 19 years, GM and SCC have hosted the regional robotics competition for middle and high school students. The event challenges

students to build a robot or complete a task or process developed by GM. More than 35 middle and 18 high schools now compete at the annual event.

**Case Study:** Collegiate School for Medicine and Biosciences/St. Louis Public Schools Magnet High School

The school was initiated by Cortex, Washington University, St. Louis University, and community leaders and graduated its first class last spring. One hundred percent of the graduates were accepted at four-year colleges. It ranks as one of the region's highest performing public or private schools. Committed to inclusion, more than half the students are African-Americans. The school also provides an ESOL/Bilingual/Migrant program for students and their families at the K-12 levels.

**Case Study:** St. Louis City Public Schools

More than 17,000 students are enrolled in 44 schools in the city's public schools system. Students perform more than 276,000 hours of community service annually and 96 percent of the graduating students attend college. STEM AP offerings include: biology, calculus, physics, environmental science, computer science, mechanics, physics electricity and magnetism, and statistics.

**Case Study:** Code Red Education/K-12 Schools in St. Louis & Metro East

By providing computer science instructional materials and teacher training, Code Red has been able to impact the computer science education of approximately 56,000 students in the St. Louis metro area. Eighty-two percent of K-12 students that have gone through courses powered by Code Red have achieved proficiency in CSTA computer science standards. Seventy-three percent of seniors in those courses have also shown interest in pursuing college degrees and/or careers in computer science. Out of that demographic, ninety-one percent are currently either employed in the tech workforce or pursuing degrees in computer science/engineering.

### **Case Study:** St. Louis Metro Academic and Classical High School (Metro High)

Metro High is among the nation's 500 best high schools in preparing students for college and it's the highest ranked high school in Missouri according to a 2017 U.S. News and World Report. The publication evaluated more than 22,000 public high schools in the country. The school has extensive STEM programming.

### **Case Study:** Hawthorne Leadership School for Girls

Hawthorne is the only public all-girls school in Missouri that provides college preparatory education with a focus on STEM. The school opened in 2015 with 120 sixth and seventh grade girls, and will continue to add a new grade each school year through the 12th grade in 2020.

## STEM Learning Ecosystems

The St. Louis region has just been selected to join the STEM Learning Ecosystems, a national initiative designed to make a significant impact on STEM education. Initial priorities include: 1) Building a regional culture of STEM learning, 2) Enhancing in-class STEM education, 3) Ensuring in-class learning is aligned with quality and accessible out-of-class STEM experiences, and 4) Linking STEM Learning with college and career opportunities.

### YMCA Region After School STEM Enrichment Program

In addition to supplementing what they've learned in school, students participate in STEM interactive learning models that engage critical thinking skills. The YMCA program is available daily following school hours.

### Parkway School District's Spark!

Parkway School District's Spark! program provides students with an individualized, industry-driven, and immersive STEM programs including computer science, bioscience, health science, and engineering. Partnerships include (SLU, Washington University, and Missouri S&T) as well as industry partners such as (Barnes-Jewish Hospital, World Wide Technology, Boeing, and Monsanto). Students get authentic professional experiences and 90 percent go on to pursue majors in STEM-related careers.

### John Burroughs Schools (JBS) STEM Co-ed Independent School, Grades 7-12

The Industrial Technology and Engineering department at JBS has been recognized for STEM innovation by the Missouri Mathematics and Science Coalition and the Monsanto Fund. In addition to seventh and eighth grade technical design and industrial technology and engineering classes, upper school electives are offered in architectural drawing, digital audio technology, computer video editing and special effects, computer-aided drafting, high-tech tooling, and independent study.

### Mary Institute & Saint Louis Country Day School/Beasley Elementary (MICDS) Co-ed Independent School, Grades PK-12

Students learn how to think like programmers to solve problems in STEM and humanities classes. In the elementary grades, children learn that code is the language of machines. They experiment with developmentally appropriate coding concepts and skills, including basic loops and if/then statements. Middle schoolers build on that foundation. They are encouraged to think algorithmically to break a problem into steps. They learn block coding in the fifth grade, and advance from there. Upper school students dive deep into Python and Java coding languages, AP computer science, STEM classes, Robotics Club, and through project applications in humanities classes.



## GlobalHack

Launched in St. Louis in 2013, GlobalHack organizes events that kickstart community-focused software projects and deliver accessible computer science education opportunities for kids. GlobalHack offers a variety of different opportunities for middle and high schoolers in the St. Louis metro region. Programs include:

- **Youth Coding Workshops:** GlobalHack partnered with local co-working spaces and the St. Louis County Library system to host a series of beginner-friendly workshops and activities around coding and computer science. Enrollment: 904 students from 47 area schools participated in 36 workshops.
- **Hackathons:** These competitions encourage more middle and high school students to participate in software competitions and provide students and non-students alike with a platform to apply their coding knowledge to solve real-world problems in a team-based environment.

Partnerships have also been made with youth-focused organizations (e.g. Girl Scouts of Eastern Missouri) to host one-day design challenges where small teams of students build a wireframe for a web or mobile application using simple, easy-to-use drag-and-drop software. With the help of industry mentors, students gain experience with UI/UX design, critical thinking, competitive analysis, teamwork, and presentation skills.

- **Summer Coding Camp:** GlobalHack recently hosted its first coding-focused summer camp at UMSL for area middle and high school students. Courses included: game development, web design, coding in Python, and app development, among others. Each week of camp concluded with a career panel to expose students to careers in tech and a show and tell session so that students could share their final projects with parents and peers. Enrollment: 407 students participated.
- **Youth Coding League (YCL):** Launched Fall 2017 with 20 teams from 13-area schools, the Youth Coding League is a 12-week competitive coding program for middle school students. Students learn computer programming basics (Python). Industry mentors, typically software developers, are also available to provide additional support and guidance to teams.

- **CS4MO Collaborative:** GlobalHack, along with other educational, civic, and private partners are forming a statewide working group called CS4MO to advocate for K-12 computer science programming throughout the State of Missouri.

## Create a LOOP

Create a LOOP is a nonprofit organization that teaches kids computer science skills. The goal of the organization is to build a worldwide community of clubs that produce the next generation of creators, instead of consumers. Clubs meet two hours a week and are taught by volunteers and parents.

Create a LOOP provides clubs with curricula, technology, and club activities to club members to learn, make, and play through computer science. Participants learn multiple computer programming languages.

## St. Louis Summer Computer Camp

iD Tech offers summer day camps and overnight camps for kids and teens. Co-ed programs include iD Tech Camps for ages 7-17, iD Tech Academies for teens ages 13-18, and iD Tech Mini for ages 6-9, as well as an all-girls program called Alexa Café. Participants develop iPhone and Android apps, program with C++ and Java; design and create video games and websites; produce movies, build robots, and more. The camp is hosted at Washington University in St. Louis.

## Coding Classes/Summer Camps

Dozens of coding classes are held each summer for K-12 students. The classes are held at various universities and community colleges, including: Washington University, Lewis & Clark Community College, St. Charles Community College, New City School Summer Camp (K-6), St. John Vianney High School, Chesterfield Day School, Maryville Science and Robotics Program, and more.



# Increasing Access to Education: Scholarship Initiatives

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In thinking about what is best for the region in the long term, we are, of course, thinking about what is best for our children and youth.

As a result, our region's biggest innovation has to be around equity in education.

The development of scholarships and grant opportunities continues to be a vital part of the region's postsecondary training. At the state level, the Missouri Department of Higher Education (MDHE) administers several scholarship and grant programs for Missouri residents, including: the Access Missouri Award, a need-based grant program; the Advanced Placement (AP) Incentive Grant, designed to encourage high school students to take and score well on AP tests in mathematics and science; and the Bright Flight Scholarship, a merit program for those scoring in the top three percent of all Missouri high school students taking the ACT or SAT test their senior year (currently a composite score of 31).

An additional MDHE program, the A+ Scholarship Program, provides scholarship funds for all graduating seniors to attend a two-year public community college or vocational school. Initially available for public school graduates, the program recently expanded in 2016 to include funding for private school students as well.

A local example of expanded access to higher education is the partnership between Beyond Housing and the Normandy School District. Launched in 2013, the program gives a \$500 MOST 529 college savings Promise Account to every student entering kindergarten in the Normandy school district. In 2016, Beyond Housing extended the program to include Normandy High School seniors, with 116 students receiving a \$250 college savings account gift. To date, more than 1,000 kindergarten students have enrolled in the program, and nearly \$600,000 has been placed in 529 interest-bearing accounts through the Missouri State Treasurer's 529 MOST College Savings Plan.

The Illinois Promise began in Fall 2005 to ensure the accessibility of higher education for students from the lowest income levels. The Illinois Promise gives eligible recipients sufficient grant, scholarship, and loan funds, in combination with a minimal employment expectation, to cover their estimated cost of tuition, fees, room, board, books, and supplies. Illinois Promise scholarships bridge the gap between a student's federal and state financial aid packages and the actual cost of an Illinois education. Since the program's inception, more than 2,800 students have been awarded scholarships totaling \$5.2 million, and three-quarters of the receiving students are first-generation college students.

At the regional level, St. Louis has improved student access to private scholarships and interest-free loan programs through the Scholarship Central portal, which provided more than 100 scholarship and interest-free loan programs last year. Most are open to students pursuing any academic major. Scholarships specifically related to an IT degree include the American Association of Blacks in Energy Southeastern Missouri/Southern Illinois Scholarship and the Midwest Cyber Center Scholarship. For the 2017-18 academic year, \$6.2 million was awarded to 1,200 applicants using Scholarship Central. Additionally, the Scholarship Foundation of St. Louis provided \$3.2 million in interest-free student loans and nearly \$1 million in grants to 512 students.

The Missouri Land Grant is awarded to all undergraduate Missouri residents who are full-time Pell Grant eligible and working toward their first undergraduate degree. For those eligible, the grant will cover all tuition and fees not covered by other grants or scholarships.



Private universities also have made scholarships a priority, offering hundreds of millions of dollars every year to students based on need and merit. Examples include:

### Washington University in St. Louis

If a student is accepted to Washington University but lacks the money for tuition, Washington University will create a grants package to ensure the student can attend and graduate debt-free. In 2016, the university awarded more than 230 scholarships to 415 students in the School of Engineering & Applied Science. The Graduate Affiliation Scholarship and the Langsdorf Fellows scholarship are among the many scholarship programs available to students in STEM degree programs. All students who enter the Engineering Dual Degree Undergraduate & Graduate Degree programs are awarded the Graduate Affiliation Scholarship, which guarantees a 50 percent tuition discount for the first year, a 55 percent discount the second year and a 60 percent discount the third year. In 1966, the School of Engineering & Applied Science established an academic fellowship program to provide funding opportunities for students who have high academic potential. Incoming first-year students with exceptional promise are selected as Langsdorf Fellows to receive 100 percent tuition for four years of undergraduate study.

### Saint Louis University (SLU)

In 2015-2016, SLU students received more than \$173 million in scholarship support, partly due to the university's "Go Further" initiative, which matches qualified gifts of \$100 or more to enable scholarships based on need and merit. More than 24,000 gifts have been matched since then, totaling \$16 million. SLU has an ambitious goal of funding 3,500 additional need- and merit-based scholarships, student retention and veterans/military dependents scholarships, and pre-college program scholarships to engage K-12 students in careers in science, technology, engineering, mathematics, and health-related fields.

SLU is also constantly seeking grants to make its program more affordable. Recently, funds were secured for BITWISE (Bioinformatics Training With Industry Support and Engagement Scholars) Scholars and McNair Scholars programs. SLU's Master of Science program

in Bioinformatics and Computational Biology were awarded National Science Foundation Funds for the BITWISE program, which gives up to \$10,000 per year for two consecutive years to individual scholars. SLU partners with the U.S. Department of Education on the McNair Scholars program. The program helps prepare undergraduates who are low-income, first-generation or members of under-represented groups for post-graduate work and advanced degrees. Students receive stipends and SLU waives tuition during the summer research component, which carries college-level credit.

### Fontbonne University

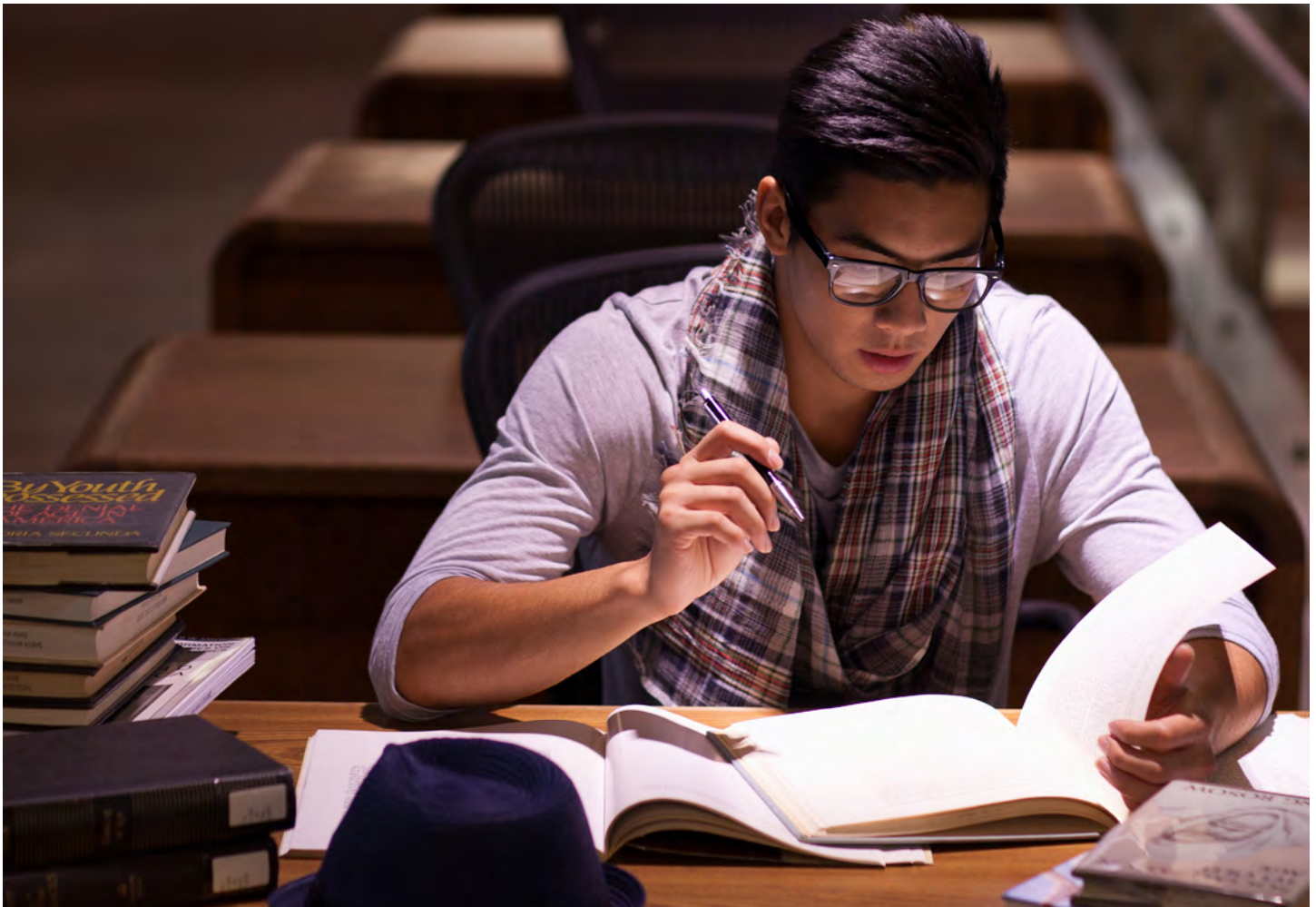
Just announced in September 2017, The Fontbonne Promise is a unique opportunity for first-time, first-year, need-based students in Missouri. The university will award full tuition and fees for up to five years to at least 30 2018 freshmen. Students who qualify for The Fontbonne Promise will receive a financial aid award that covers full tuition and fees. The scholarship funding will be made possible through a combination of state aid, Fontbonne aid and donor contributions

### University of Illinois

The Technology Entrepreneur Center within the University of Illinois College of Engineering encourages students to pursue or continue their tech-focused education with more than 25 scholarship programs, ranging from the Grasshopper Entrepreneur Scholarship that offers \$5,000 to eager young business leaders, to a \$1,500 Women in Tech Scholarship.

### Big Idea: The St. Louis Regional Scholarship Program

To meet Amazon's anticipated employment needs, we work backwards from a goal of 50,000 employees by 2027. Although Amazon will recruit globally, St. Louis must invent and simplify programs that incentivize students to pursue degrees in Information Technology (IT). An unprecedented depth of partnership between elected officials, regional education leaders, and employers like Amazon will be required to increase the number of graduates in technical fields aligned with Amazon's needs.



To dramatically increase the number of St. Louis area students pursuing degrees in IT-related fields, there is a vision for an innovative and targeted scholarship initiative as part of the incentive package offered by the City of St. Louis and Missouri: The St. Louis Regional Scholarship Program (STLRS). Funds awarded would likely take multiple forms to ensure efficient and sustainable use of funds. Goals of the program include:

- Improved enrollment in two and four-year IT degree programs; and
- Immersive, paid, summer internships with St. Louis-based corporations exclusively for scholarship recipients to help students develop relationships with local employers for future employment.

Participating students would have to meet eligibility criteria throughout the program.

There are about 28,000 high school graduates in the St. Louis metro area in any given year. If 10% of area graduates could be compelled to pursue a traditional four-year degree in

Information Technology starting in 2018, we anticipate an additional 8,400 more IT professionals would be available to hire from the local market by 2026. We anticipate even more IT professionals could be available through non-traditional and two-year programs.

To ensure the STLRS program is financially sustainable, STLRS will negotiate partnerships with cooperating colleges and universities such that STLRS scholarships follow all other sources of financial aid and scholarship support from local, state, and federal sources. In addition, the program would insist on the highest standards to build trust with employers who only want to hire and develop the best.

This is a BIG idea with urgency that requires the support of St. Louis business community. Initial conversations with civic leaders are very positive. We are confident that the STLRS program will deliver results by developing top talent. This is an innovative and new approach for St. Louis, and Amazon would be the catalyst of this BIG idea.

Jeff Bezos  
Chief Executive Officer  
Amazon  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

Dear Mr. Bezos,

It is with great enthusiasm that we write to request your support of St. Louis as the location for Amazon's second North American headquarters. Amazon and St. Louis have in common both exceptional forward-thinking energy and robust human capital. We believe your company's and our region's successes depend on those attributes. We anticipate you will evaluate the merits of all the proposals based on whether they assure your team that the region can provide a predictable, reliable flow of talent to meet the organization's needs. We can assure you that St. Louis is in a prime position to offer Amazon the kind of regional collaboration among higher education institutions needed to supply and promote the talented workforce upon which Amazon has been built and thrives.

The higher education landscape in St. Louis is strong. We have one of the largest concentrations of colleges and universities of any major metropolitan area and, over the past 10 years, our higher education institutions have conferred over 360,000 degrees. Talent comes to St. Louis from a constellation of 72 four-year and 51 two-year colleges and universities within a 150-mile radius – one of the many reasons why our central location is advantageous. And we are a region growing its talent pool: since 2010, our region has seen a 4% increase in the number of adults who possess a bachelor's degree or higher. When compared to the top 20 largest metropolitan areas in the country, we currently rank 12<sup>th</sup> in the percent of adults with a BA+ degree.

In addition to a high level of baccalaureate completion and a highly skilled pool of graduates, the St. Louis region also ranks 4th in the nation with two-year degree production from our area community colleges, with many graduates at the middle or technician skill levels in areas of IT, finance, logistics, management and other areas relevant to Amazon. The region has established innovative not-for-profit organizations, such as Launch Code, producing hundreds of coding or software employees each year.

St. Louis also is home to four research institutions which significantly add to the world's base of new knowledge. These universities are uniquely positioned to meet local, regional, national, and global imperatives in energy, security, health, and economic prosperity and attract more than \$700 million annually in research support to the St. Louis area. They offer world-class educational opportunities in the arts, sciences, business, law, engineering, social work, public health, health sciences, and medicine. In addition, they are committed to diversity and inclusion, global engagement, sustainable practices and research, innovation and entrepreneurship, and advancing human health. Amazon's expansion into this education- and research-rich environment would strengthen its position as a global leader in electronic commerce.



Our region is asset rich and collaboration strong, which is particularly evidenced in our higher education community. We pride ourselves on working together through national and international partnerships to improve outcomes for students, meet the needs of our employers, and foster a regional culture that promotes life-long learning. In the last year, the higher education and business communities have come together through the St. Louis Regional Chamber to forge the St. Louis Regional Education Commitment, a shared agenda to see St. Louis become a Top Ten region for educational attainment by 2025. We know a region's workforce reflects its economic viability. As such, we are collectively committed to long-term strategies to remove barriers for students in our region, accelerate the rate by which students complete their post-secondary degrees, and leverage our regional education assets to align to employers' workforce needs. To date, this agenda has been endorsed by coalitions representing over one hundred organizations in our region who are committed to working together to achieve the Top 10 Goal. The Regional Education Commitment reflects an unprecedented level of collaboration in pursuit of a shared vision of the future that frames education as a core economic driver for the St. Louis metropolitan region.

With this increasing collaboration and strategic focus, the time is right for Amazon to capitalize on our community's commitment to developing, attracting and retaining talent. We expect that you will find this kind of collaboration among higher education institutions and business in pursuit of a shared agenda to be a rare asset that St. Louis provides. And, while we know that you will find that we offer the kinds of training and degree programs that will supply Amazon with the talent it needs now, we are also eager to work with you and your team to create the kind of responsive programming needed to meet your workforce needs for the future.

One of the things we hear a lot from entrepreneurs, recent college graduates, and others who relocate to our region is that St. Louis is a place where you can make a difference. We hope you see what our community can offer. We invite your careful consideration and are happy to share our enthusiasm for how St. Louis can provide Amazon with unparalleled opportunities.

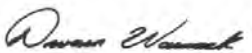
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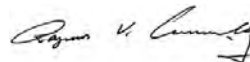
President Jon Bauer  
*East Central Community College*



President J. Michael Pressimone  
*Fontbonne University*



President Dwan Warmack  
*Harris-Stowe State University*



President Raymond V. Cummiskey  
*Jefferson College*



President Dale T. Chapman  
*Lewis and Clark Community College*



President Michael D. Shonrock  
*Lindenwood University*



President Mark Lombardi  
*Maryville University*



President R. Alton Lacey  
*Missouri Baptist University*



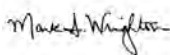
President Fred P. Pestello  
*Saint Louis University*



Chancellor Randall Pembroke  
*Southern Illinois University Edwardsville*



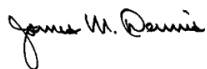
Chancellor Jeff Pittman  
*St. Louis Community College*




Chancellor Mark S. Wrighton  
*Washington University in St. Louis*



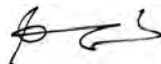
Chancellor Angie Besendorfer  
*Western Governors University Missouri*



President James M. Dennis  
*McKendree University*



President Stan Shoun  
*Ranken Technical College*



President Carlos Vargas  
*Southeast Missouri State University*



President Barbara Kavalier  
*St. Charles Community College*



Chancellor Thomas F. George  
*University of Missouri—St. Louis*



President Elizabeth (Beth) J. Stroble  
*Webster University*

A close-up photograph of a person's hand interacting with a tablet. The person is wearing a light-colored sweater with a dark, repeating geometric pattern. The hand is positioned over the tablet, with fingers slightly curled. The tablet is lying flat on a surface, and its screen is visible. The background is blurred, showing what appears to be a window or a bright light source. The overall tone is professional and modern.

**LOGISTICS**





# LOGISTICS

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*“For Hyperloop One, the Missouri Team application stood out for several reasons, including government buy-in, ample traffic, and a strong business case. Missouri also has several unique characteristics – it has the seventh-largest state highway system in the U.S., and St. Louis is home to the third-largest rail hub in the nation. Another standout is St. Louis being the nation’s third-largest inland port.”<sup>1</sup>*

– Nick Earle

Senior Vice President of Global Operations  
Hyperloop One

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<sup>1</sup> “New transportation system: KC to St. Louis in 23 minutes,” Kansas City Business Journal, April 5, 2017

## Does St. Louis have the infrastructure in place to accommodate commuter and commercial needs for Amazon?

Yes. St. Louis is logistically relevant to Amazon and conveniently located for Amazonians.

Availability, accessibility, and connectivity — St. Louis is in a prime location that will help Amazon better compete in the 21st century while the company continues to explore and test future technology and transportation options — such as autonomous cars, bus-rapid transit, drones, and HyperLoop connections — that may become a reality in the next decade.

Located in the Central Standard time zone at the geographic hub of the United States — 500 miles within one-third of the U.S. population, and 1,500 miles within 90 percent of the population — travel time from St. Louis to most major U.S. cities is a mere two to three hours, allowing business to be conducted conveniently with both coasts and much of Europe.

With extensive infrastructure within the four major transportation modes — air, road, rail, and river — the St. Louis region offers highly developed logistics infrastructure for global businesses in St. Louis to manufacture and distribute products throughout the U.S. and the world. Also, shipments originating in St. Louis can reach anywhere in the U.S. within a three-day truck drive.

From the standpoint of natural resources, St. Louis is also surrounded by abundant quantities of flat land, multiple sources of fresh water, and a mild climate — ideal for the development of distribution-intensive companies with multimodal shipping throughout the year. In fact, the metro area has 23 specific areas where transportation modes align with industrial land use, providing companies with great options.

For commuters, travel time from favorite venues is typically a walk, bike ride, drive, or metro train ride away. The U.S. Census Bureau reported work commute times in St. Louis in 2015 averaged 25.6 minutes, with significantly less congestion than metro areas of similar size. In 2012, the St. Louis MSA had the lowest travel time index of the 25 largest U.S. metro areas.

Five airports serve the St. Louis region. The major airport, St. Louis Lambert International, currently operates at 42 percent of its maximum capacity in terms of total aircraft operations. This provides Amazon a tremendous opportunity to fully leverage the underutilized infrastructure of this international airport, once the U.S. hub for Trans World Airlines (TWA).

In addition to the airports, St. Louis is connected by two of the world's largest rivers, the Mississippi and the Missouri, four interstates, the MetroLink light rail, MetroBus, six Class 1 railroads, and numerous bike and pedestrian-friendly greenways. Abundant parking — 46,000 spaces — is available in high-rise garages and on surface lots throughout downtown. An additional 2,700-metered curbside parking spaces are available on the streets.

Metro operates the St. Louis region's extensive public transportation system, which includes: MetroLink, the region's light rail system; MetroBus, the region's bus system; and Metro Call-A-Ride, a Para transit van system. Metro carried more than 40 million passengers in 2017. Metro has a fleet of 282 MetroBus vehicles, 50 light rail vehicles, and 93 Metro Call-A-Ride vans. Other systems linking up with Metro include Madison County Transit and St. Charles Area Transit System.

For those who prefer bike and pedestrian paths to motorized transportation, the city has accelerated expansion of the area's popular network of interconnected trails and greenways designed to connect communities and preserve nature. Initiated in 2002, the off-street trails total 114 miles and soon will be expanded to more than 200 miles, with plans to grow to 600 miles. Pedestrians and cyclists will find the region knitted together as never before.

In 2018, Amtrak's high-speed train service between Chicago and St. Louis is expected to start. The new locomotives, which run on diesel-electric engines and emit 90 percent less pollution, will travel at 200-plus mph, reducing travel time to four-and-a-half hours between the two cities.



St. Louis is well positioned to provide quality and sustainable transportation options for Amazon's HQ2 moving into the future. The region is currently conducting several multimodal transportation studies. For example, the Bi-State Development Agency, the region's transit agency, is conducting a study, titled "Metro Reimagined," a comprehensive, full-scale analysis of the MetroBus system. The regional

metropolitan planning organization, the East West Council of Governments, is conducting a study to determine the next light rail expansion.

In addition, Great Rivers Greenways (GRC), the region's parks and trails authority, has undertaken a design competition to create the "Chouteau Greenway," which will connect Forest Park and the Gateway Arch.



# Think Big and Be Creative

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## Pedestrian-Friendly Urban Footprint

Imagine a city where walking, biking, and skateboarding is a seamless experience. From home to work and work to play, connectivity provides the freedom to travel effortlessly through a pedestrian-friendly urban environment. St. Louis' urban planners are well on their way to making the sustainability of our mobility footprint a reality. The city has already been designated as one of the "10 Best Cities to Live in Without a Car — Benefits of a Car-Free Lifestyle" (Money Crashers, 2015). Within the proposed River Campus is the opportunity for contiguous walkable and bikeable options, all connected by light rail and the bridge, with future room for growth. Bottom line: St. Louis is on the move.

## Autonomous Driving Cars

In the future, individuals may be renting vehicles that drive themselves. St. Louis-based Enterprise, the world's largest car rental company, is interfacing with millions of customers each year, with many of its drivers experiencing new automotive technologies in its rental vehicles.

## Bus Rapid Transit (BRT)

The St. Louis Rapid Transit Connector Study identified two potential bus rapid transit (BRT) routes. Running on electric railways, the rapid transit systems operate on an exclusive right-of-way, which cannot be accessed by pedestrians or other vehicles, and which is often in tunnels or on elevated railways. Interstates I-64 and I-70 were selected for their capacity to enhance mobility for transit-dependent populations.

- **Central Corridor BRT:** The I-64 corridor spans 23 miles between downtown St. Louis and West St. Louis County. The BRT route would service a number of park-and-ride stations along the route, with service frequencies matching MetroLink. The addition of this high-performance service would be the first in the region, improving travel time and convenience for riders.
- **West Florissant-Natural Bridge BRT:** This arterial-based BRT route connects North St. Louis County to downtown St. Louis. The service would operate out of the new North County Transit Center, running 16 miles to downtown. Again, its service would match MetroLink and would include stations with a high-level of customer amenities placed a minimum of one mile apart, with transit strategies implemented to speed travel. The combined West Florissant-Natural Bridge corridor hosts 70,000 people and 18,000 jobs within a half mile, not counting downtown.

## HyperLoop One

St. Louis joined other elite cities from around the world as a finalist in the HyperLoop One Global Challenge, putting the city in a prime position as a central hub for future expansion, connecting St. Louis to Kansas City, Chicago, Pittsburgh, and beyond. With leadership from the state of Missouri as an early adopter of this technology, the region is actively engaged in developing this new modality. The newly formed Missouri Hyperloop Coalition is conducting a feasibility study for the 250-mile route between St. Louis and Kansas City. The coalition was featured in an article that appeared in Inc. October 4.<sup>2</sup>

## Drones/Missouri Legislation

A group of Missouri legislators have voiced their support to introduce legislation to provide guidelines for Amazon's contemplated drone delivery service. Missouri Representative David Gregory is currently drafting legislation to facilitate drone delivery services throughout the state of Missouri.

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2 "A surprising new location is emerging as a favorite to land the first Hyperloop," Inc., Oct. 4, 2017; <https://www.inc.com/kevin-j-ryan/hyperloop-one-missouri-coalition.html>





## Envision I-70

A multimodal planning approach to transportation along the I-70 corridor is currently underway. Transportation improvements, solutions, and strategies are being recommended as part of the Planning and Environmental Linkages (PEL) study to increase safety on the corridor, manage existing and future traffic congestion, provide efficient access for existing and future development along the corridor, improve efficiency and reliability of freight movement, expand multimodal mobility and connectivity, enhance aesthetics, and preserve the environment.

## Proposed MetroLink Expansion

Multiple options for MetroLink expansion are under active consideration by local governing authorities as the region collectively determines how best to ensure improved transit mobility throughout St. Louis. Expansion of MetroLink will be made possible, in part, by Proposition

1, which passed in April 2017. As a result of Proposition 1, the city now has dedicated funding for transit expansion. A design study is being conducted on a potential North-South line with 30 percent of the design expected to be completed by spring of 2018. The study will also evaluate three potential routes around the Western Headquarters of the National Geospatial-Intelligence Agency (NGA) campus.

In addition to the Proposition 1 revenues from the City of St. Louis, revenue for potential MetroLink expansion is also available from the half-cent Proposition A sales tax approved by St. Louis County voters in April 2010. Also included in the St. Louis region's long-range transportation plan from the East-West Gateway Council of Governments are potential extensions to North County (MetroNorth), South County (MetroSouth), and Westport (Daniel Boone). All of these options would strengthen connections to our urban core and provide new linkages between employment centers and residents. A map of existing MetroLink stations is included on page 198.



# Transportation Logistics

## AIR

- St. Louis Lambert International Airport
- MidAmerica St. Louis Airport
- Spirit of St. Louis Airport
- St. Louis Downtown Airport
- St. Louis Regional Airport

### St. Louis Lambert International Airport

#### Commuter Attributes (Air)

The region’s main airport, St. Louis Lambert International Airport has two terminals, three concourses, four runways, and more than 85 gates serving 11 passenger airlines. Centrally located in the region, St. Louis Lambert International Airport is 20 minutes from downtown and has on-site access to the MetroLink light rail system at each terminal.

A \$2.6 billion runway expansion project has expanded operational capacity and minimized inclement weather delays. The expansion provides access to an underutilized 9,000-foot runway. A \$97.5 million Terminal 2 expansion added 12 gates, allowing Southwest Airlines up to 120 additional flight departures per day. Of the 11 carriers serving the airport, Southwest Airlines has focused on St. Louis as a growth market and is currently the largest carrier serving Lambert. American Airlines and Delta have extensive operations at the airport as well. Private aircraft services are also available.

On average, there are more than 245 daily departures from St. Louis to 71 nonstop destinations. Between 2010-2016, the number of annual commercial passengers rose from 6.1 million to 6.9 million, an increase of 13.1 percent. Yearly commercial departures were up 4.1 percent for the same period, with peak travel times in the summer months.

St. Louis’ Lambert airport has the lowest taxi-out average in the industry. For taxi-in times, St. Louis trails Oklahoma City, Tampa, Portland, and San Jose, by just seconds.

### Federal Aviation Administration: Aviation System Performance Metric Taxi Times Standard Report

Jan. 1, 2017–June 30, 2017

AIRPORT	TAXI-OUT		TAXI-IN	
	DEPARTURES	AVG MINUTES	ARRIVALS	AVG MINUTES
Atlanta	216,814	17.47	216,780	8.59
Dallas/Fort Worth	158,529	18.59	158,540	11.26
Washington Dulles	61,650	18.40	61,5645	6.37
Chicago O’Hare	204,464	19.90	204,428	12.26
St. Louis	45,286	11.55	45,215	5.11

## Amazon will be featured prominently at Lambert

St. Louis is proposing the Southwest Terminal at St. Louis Lambert International airport be connected directly to the Amazon Conference and Welcome Center. Human Resources, training rooms, and meeting space could be located on-site at the center, maximizing efficiency for employees. A 200-room hotel will be built adjacent to the center for added convenience. If heading to the proposed urban-based campus downtown, employees would access the MetroLink light rail system, which will originate at the Amazon Conference and Welcome Center.

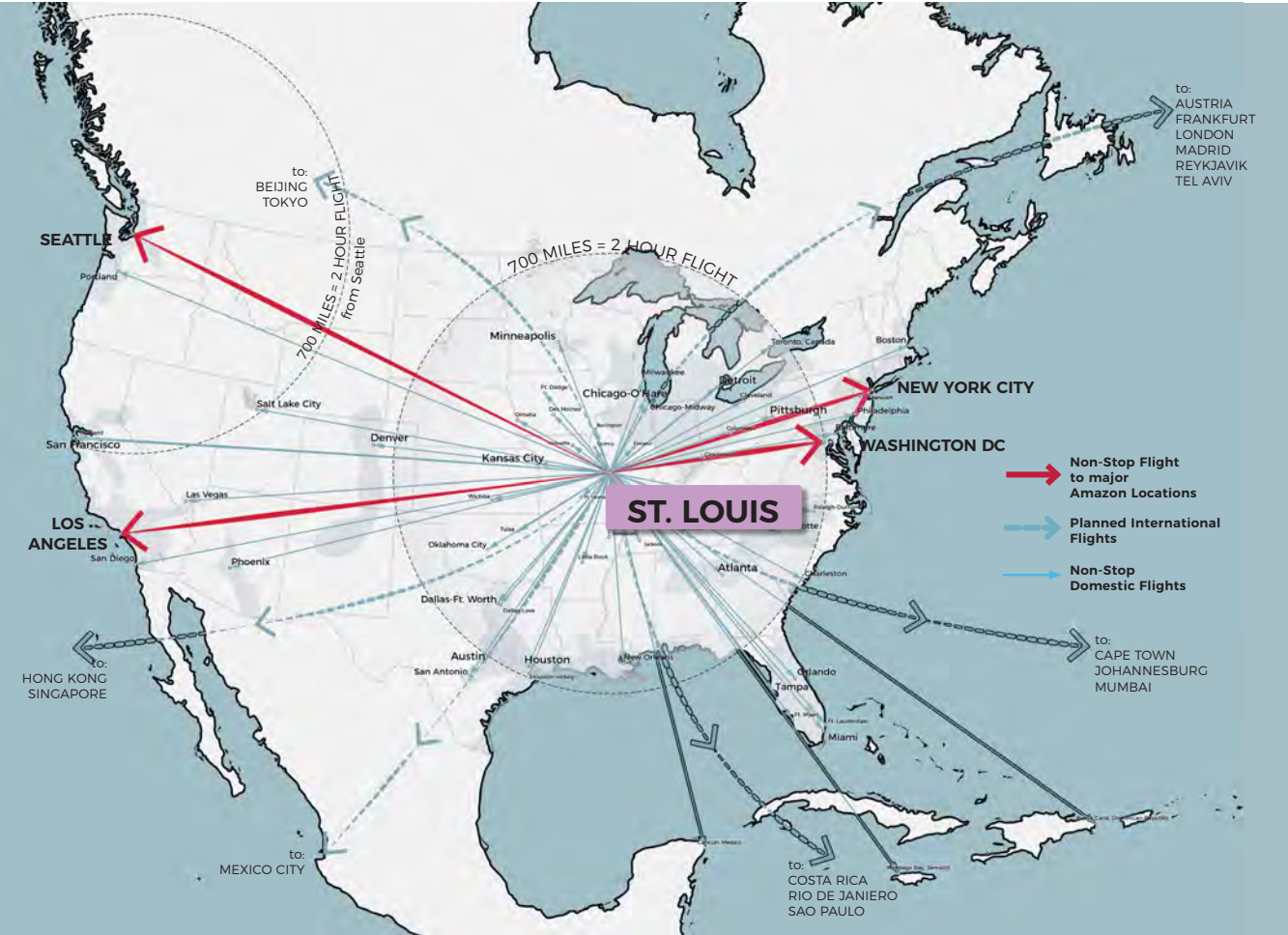
St. Louis Lambert International Airport Passenger Air Carriers include:

- Air Canada
- Air Choice One
- Alaska Airlines
- American
- Cape Air
- Delta
- Etihad Airways
- Frontier
- Southwest
- United
- WOW Airlines

## Carrier and Flight Information from St. Louis Lambert International



Perfectly Centered:  
Destination Map from St. Louis Lambert International Airport





## Commercial Attributes

St. Louis is a designated Foreign-Trade Zone Alternate Site Framework (ASF). The area exports \$16 billion in goods and services annually, which directly contributes to 94,000 jobs throughout the region. International trade is paramount to present and future job creation in St. Louis. Other benefits include:

- FedEx and UPS operate regional hubs near Lambert.
- 11 passenger carriers that handle freight.
- Integrated Airline Services, Inc. and Airport Terminal Services provide air cargo services.
- U.S. Customs and Border Protection as well as Foreign Trade Zone 102 both operate at the airport.
- There are approximately 50 freight forwarders located in Greater St. Louis. These firms include businesses with strong domestic connections and working partnerships with long-haul trucking and road-feeder services, as well as most of the major international freight forwarders.

## Distribution/Manufacturing Opportunities

In 2015, plans were made to redevelop a former McDonnell Douglas manufacturing facility in North St. Louis County into an international air cargo operation focused on international trade. Named the Bi-National Gateway Terminal, it will feature a state-of-the-art air cargo terminal and ramp space for freighter aircraft, occupying more than two million square feet. In partnership with the Mexican government, dual customs agents representing both Mexico and the United States will operate on-site in St. Louis, allowing for faster pre-clearance of cargo shipments. This will expedite the movement of goods as they are flown from one country to the other, and it will speed up client supply chain efficiencies by up to two days. Mexico is the third largest trading partner for the St. Louis region, with the existing relationship valued at \$3.5 billion per year. Increasing the region's relationship with the city's southern NAFTA partner has been a long-term objective for St. Louis.

The density of St. Louis-based companies operating in the supply chain led to the formation of The Center for Supply Chain Management at St. Louis University (SLU). The center trains and educates its members on supplier relationships, purchasing management, operations and inventory management, logistics and transportation, quality measurement, and information technology. The center has multiple partners, including affiliation with leading supply chain companies in the St. Louis metropolitan region, APICS, ASQ, CSCMP (formerly CLM), ISM (formerly NAPM), Missouri Enterprise, National Contract Management Association (NCMA), and National Defense Transportation Association (NDTA).

More than 75 companies operate large distribution facilities (250,000 square feet or more) in Greater St. Louis. The region's warehousing industrial market includes more than 5,000 buildings totaling almost 250 million square feet, including Amazon's leased facility in the Hazelwood Logistics Center. Amazon's new warehouses, located in proximity to I-70, I-270, and the Innerbelt, make it conducive for employees to access the proposed site for HQ2 within minutes. Other companies operating warehousing facilities include Buske, Dial Corporation, Macy's Retail Holdings, Inc., Hershey Foods, Hussmann Corporation, Procter & Gamble, and more.

**Live Animal Exporting:** The St. Louis Economic Development Partnership, Midwest Cargo Hub Commission, and St. Louis Lambert International Airport have worked together to design, fund, and build new live animal penning, holding, and loading facilities to allow for live animal exporting. The U.S. Department of Agriculture's (USDA) Animal and Plant Health Inspection Service (APHIS) has granted conditional pre-approval to the facility as both a Temporary Port of Embarkation and Temporary Export Inspection Facility. Exporting of livestock genetics from the United States by air is increasing, and the central location of St. Louis provides an opportunity to be extremely cost effective.

## St. Louis Downtown Airport

St. Louis Downtown Airport (KCPS) is the third busiest airport in Illinois behind O'Hare and Midway. There are three runways, a control tower, and a dedicated fire department. Located four miles from the proposed Amazon HQ2 site, the airport can handle planes as large as Boeing 757s or Airbus 300s. The St. Louis Cardinals and many other sports teams, businesses, and entertainers use this field because of its proximity to downtown.

There are two full service fixed-base operators (FBOs) on the field — Ideal Aviation and Jet Aviation — and both operate 24/7. Located on a 1,013-acre site with an industrial-business park, the airport completed a \$7.4 million runway reconstruction project to accommodate large aircraft such as the Boeing 757. The airport is owned by the Bi-State Development Agency.

## MidAmerica St. Louis Airport

### Commuter Attributes

MidAmerica Airport is the St. Louis Region's second full-service commercial airport. Located in St. Clair County, Ill., 24 miles from the proposed Amazon site, it provides state-of-the-art facilities for passengers.

Allegiant Airlines provides nonstop flights to the following eight destinations:

- Sanford/Orlando, FL
- Tampa Bay/St. Petersburg, FL
- Las Vegas, NV
- Ft. Myers/Punta Gorda, FL
- Destin/Ft. Walton Beach, FL
- Jacksonville, FL
- Myrtle Beach, SC
- Ft. Lauderdale, FL

The airport is pending as a Foreign Trade Zone.

### Commercial Attributes

In addition to cargo flights, the airport has an adjacent 800-acre industrial park. A 10,000-foot and 8,000-foot runway serves cargo, passenger, and military flights from the adjacent Scott Air Force Base, home of the U.S. Transportation Command. The airport recently received airfield lighting improvements and a new visual approach system to improve the safety and efficiency of its operations.

## Spirit of St. Louis Airport

The area's largest regional airport, Spirit of St. Louis Airport, is located in St. Louis County. It recently completed renovations on its main runway and parallel taxiways. The airport is home to more than 500 aircraft and two full runways: a 7,485-foot all-weather runway and a 5,000-foot parallel runway. There is a considerable amount of land available for development within close proximity to the airport. For charter flights, the airport has a total of three FBOs, providing plenty of options for private aircraft.

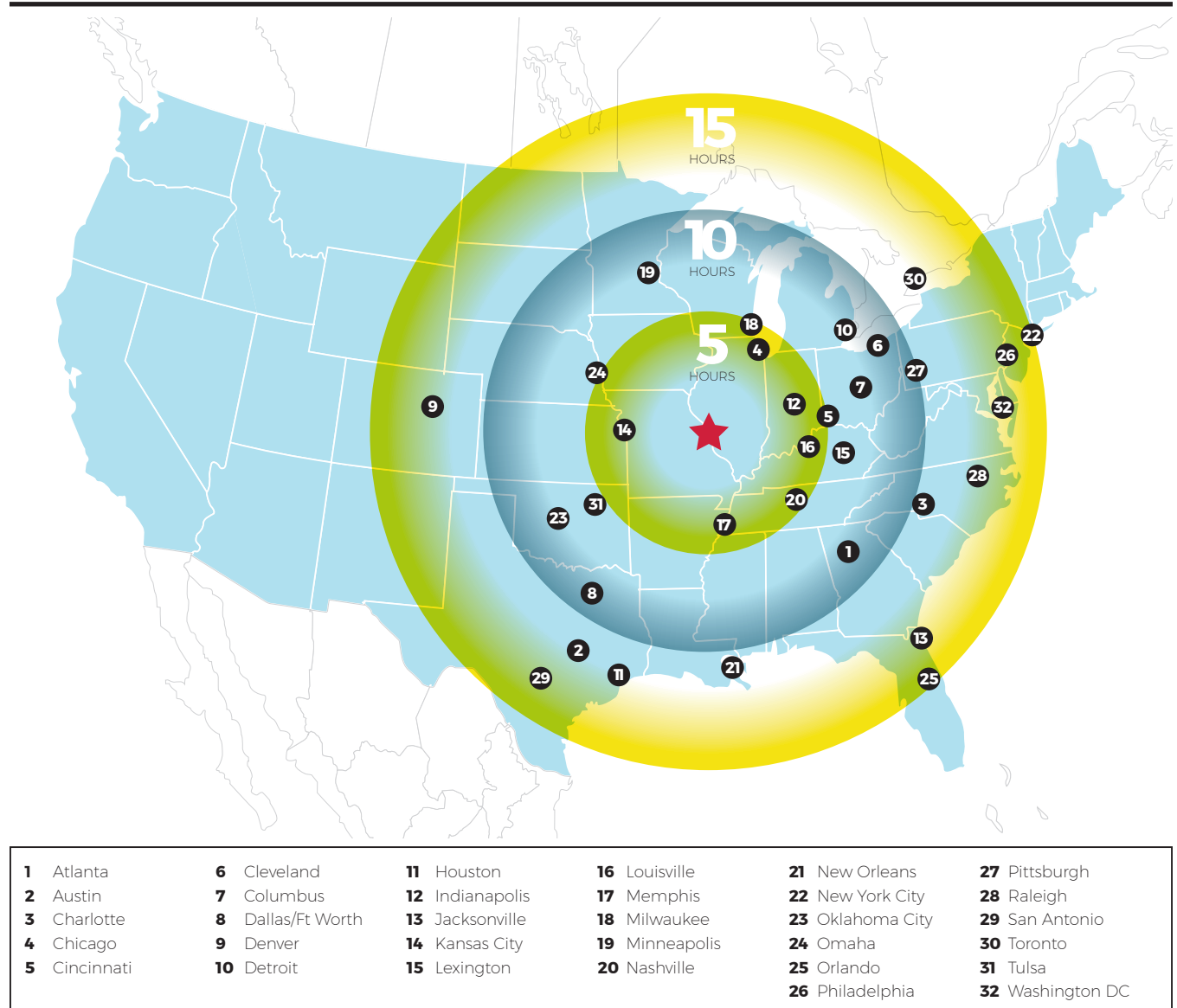
## St. Louis Regional Airport

Only 25 minutes from downtown St. Louis in East Alton, Ill., the airport serves a diverse clientele — from corporate aircraft and general aviators to the U.S. Military and regional aircraft makers. At 2,300 acres, the airport is Illinois' fourth largest, handling an average of 80,000 operations annually.

# ROAD

## Major Cities

WITHIN A 5-, 10- AND 15- HOUR DRIVE



## Commuter Attributes (Road)

### Interstate System

Missouri has one of the least congested transportation networks in the United States, and the sixth-largest public road and highway systems in the nation. In 2012, the St. Louis MSA had the lowest travel time index of the 25 largest U.S. metro areas. The city's four interstate highways put it at the nexus of the north-south and east-west interstate systems, as well as adjacent to each of the proposed Amazon sites. St. Louis is a one-day drive or less to Atlanta, Chicago, Cleveland, Dallas, Minneapolis/St. Paul, New Orleans, and more. An interstate loop

provides easy travel around the region and connects to large distribution parks throughout the metro area. These interstates include:

- I-44 (southwest from St. Louis to the Oklahoma City intersection of I-35 and I-40)
- I-55 (north-south from Chicago to New Orleans)
- I-64 (east from St. Louis to Norfolk, VA)
- I-70 (east-west from Baltimore to I-15 in Utah)

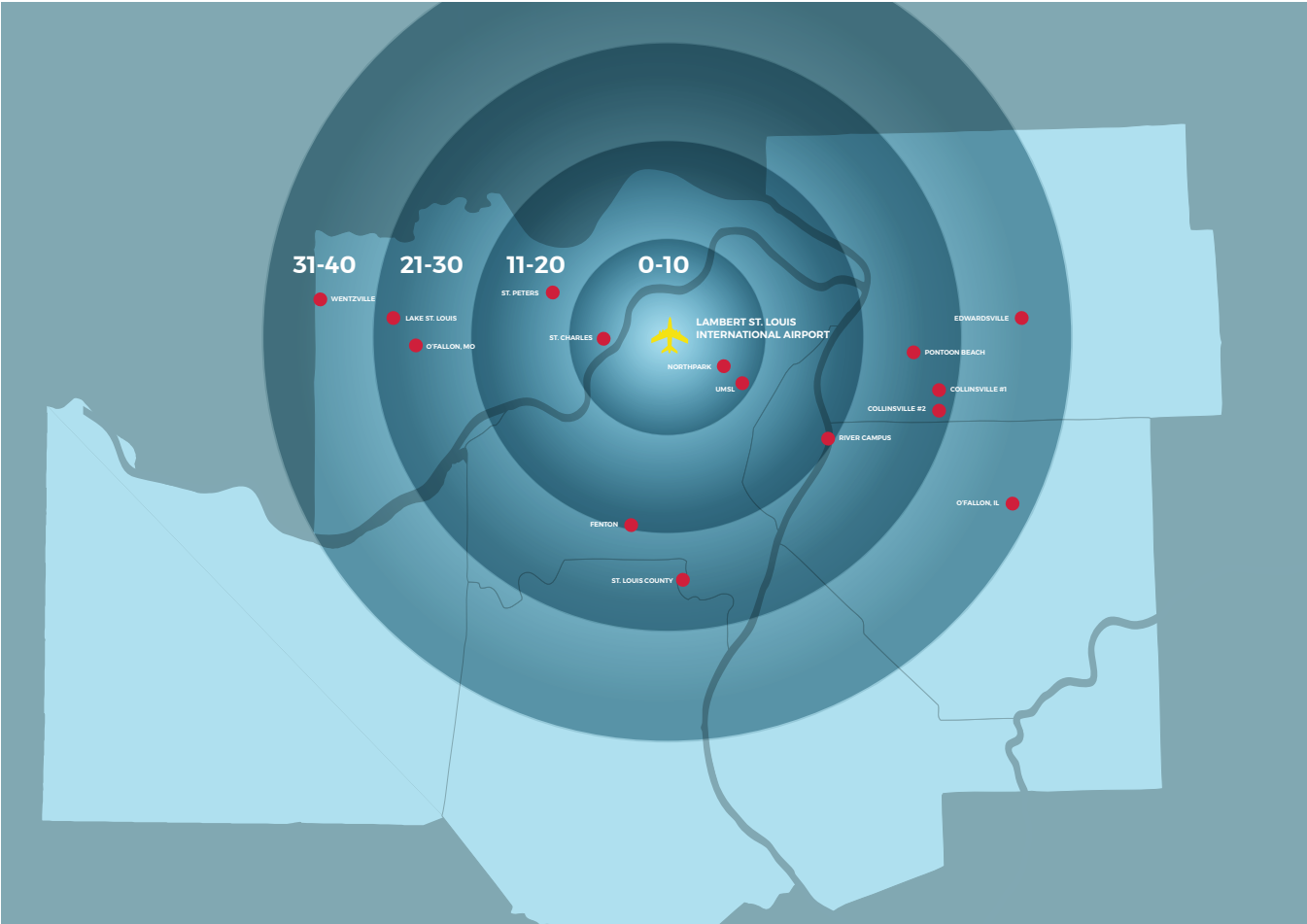
Four interstate linkages provide further connections for St. Louis motorists:

- I-255
- I-170
- I-270
- I-370



Drive Time to St. Louis Lambert International Airport  
from Proposed Amazon HQ2 Sites

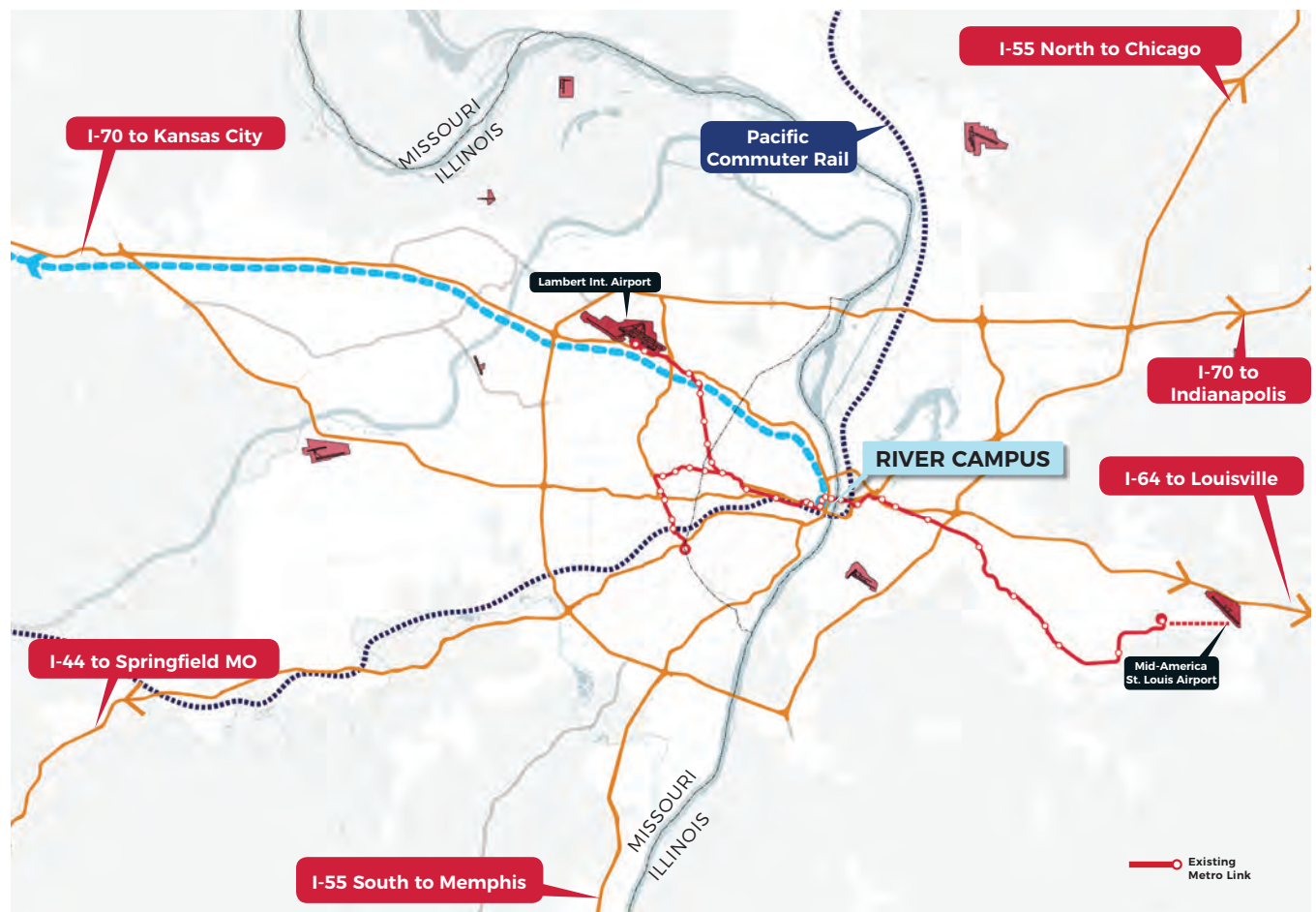
IN MINUTES



IDEAL SITE	AM PEAK	OFF PEAK	PM PEAK	DISTANCE, MILES
River Campus	19	14	21	15
ADDITIONAL SITES				
Collinsville Site 1	32	32	37	26
Collinsville Site 2	31	30	35	26
Edwardsville	36	36	41	34
Fenton	26	24	31	21
Lake St. Louis	33	32	36	29
O'Fallon, IL	39	37	42	33
O'Fallon, MO	34	33	37	27
Pontoon Beach	26	26	30	23
St. Charles	12	11	16	9
St. Louis County	30	28	36	25
St. Peters	18	18	20	16
University of Missouri – St. Louis / NorthPark	7	6	6	4
Wentzville	36	36	41	33

Source: TDM

## One Connected Region



### Missouri-Illinois Connectivity across the Mississippi River

Four bridges provide immediate access between downtown St. Louis and Illinois. A fifth is for rail traffic only. These include:

- The Eads Bridge, named after its designer James Eads, was completed in 1874 with a road deck and two rail lines. The bridge is the first all-steel bridge in the world and has a protected pedestrian walkway next to the refurbished roadway. The two rail lines were adapted for use by the MetroLink light rail system. Rail stations are located on each end of the bridge.
- The Martin Luther King Bridge is a cantilever truss bridge constructed in 1951. It carries three lanes of vehicle traffic and provides an alternative access point to Interstate 70 for westbound travelers.
- The Poplar Street Bridge is the busiest bridge in St. Louis, serving as a river crossing for three interstate highways and a separate U.S. Route. Completed in 1967, the bridge lacks pedestrian access.
- The Stan Musial Veterans Memorial Bridge is a cable-stayed bridge in the north part of St. Louis that opened in 2014, and is used for traffic on Interstate 70. The bridge currently operates with four lanes of traffic, but was constructed to be restriped to six lanes, and was designed to be compatible with a companion structure, which would provide eight lanes of traffic.
- The MacArthur Bridge lies south of the Poplar Street Bridge, and only carries rail-road traffic. Construction on the bridge was completed in 1917.
- Twenty minutes south of downtown is the Jefferson Barracks Bridge, named after the Jefferson Barracks National Cemetery. The bridge consists of two 909-foot-long, side-by-side spans that carry traffic for Interstate 255.
- The New Chain of Rocks Bridge is a pair of bridges across the Mississippi River on the northern edge of St. Louis.

The Chain of Rocks Bridge, located 26 minutes north of downtown, is preserved by Madison County and Trailnet for use as a pedestrian and bike bridge. Built in 1929, it was once a significant landmark for travelers driving Route 66. Today the bridge connects the MCT Confluence Trail, Mississippi River Trail, and the St. Louis Riverfront Trail.

## MetroBus

The Bi-State MetroBus system serves most areas of the St. Louis region with its fleet of 282 buses. More than 25.5 million passengers rode Metro buses in 2017 (through June). MetroBuses generally run from 4 a.m. until 2 a.m.; the fare is \$2. Greyhound Bus Lines operates service to and from the Gateway Transportation Center, located on South 15th Street downtown.

Bus transportation plays an integral part in transit for Amazon employees. The Bi-State Development Agency, which has a long history of regional development authority, is able to cross local, county, and state boundaries to plan, construct, maintain, own, and operate facilities and infrastructure where improvement is needed.

## Downtown Trolley

Colorful Metro buses, painted to look like trolleys, travel a circuit that links riders to many of downtown's popular attractions, including St. Louis Union Station, Busch Stadium, the America's Center convention complex, City Museum, and dozens of restaurants and hotels. An all-day pass is \$2, and can be purchased in the MetroRide Store, located at Seventh and Washington Avenue.

## Metro Call-A-Ride

Metro operates 93 Metro Call-A-Ride vans and a paratransit van system.

## Uber, Lyft, Taxis, Vans & Limousines

Whether headed to the ballpark, the Central West End, or to Lambert Airport and beyond, Uber, Lyft, taxis, vans, and limousines are available. Van services from the airport to downtown hotels are available and cost \$25 for one-way and \$45 for round-trip. All taxi drivers complete a hospitality training program run by Explore St. Louis.

## St. Louis by Car

The easy-to-use network of interstate highways throughout St. Louis make for a straightforward commute to the proposed Amazon HQ2 site. From the east, I-70, I-64, and I-55 head west across the Poplar Street Bridge and into downtown St. Louis. I-70 runs through downtown past the airport and west through Missouri. I-55 turns south past the Anheuser-Busch brewery and continues through southeastern Missouri. I-64, referred to as Highway 40 in St. Louis, continues west through St. Louis, past Forest Park to the Missouri River. I-44 begins in St. Louis and runs southwest along the former path of Route 66 to Springfield, MO.



## Bike & Pedestrian Greenways

For those who prefer bike and pedestrian paths to motorized transportation, the region has accelerated expansion of the area's popular network of interconnected trails and greenways. Initiated in 2002, the off-street trails currently total 114 miles and will be expanded to more than 200 over the next decade, with plans to ultimately grow to 600 miles.

In 2013, the region dedicated additional funds to parks and greenways, and Great Rivers Greenway (GRG) became stewards of the local investment in the CityArchRiver Project to transform the grounds surrounding the Gateway Arch.

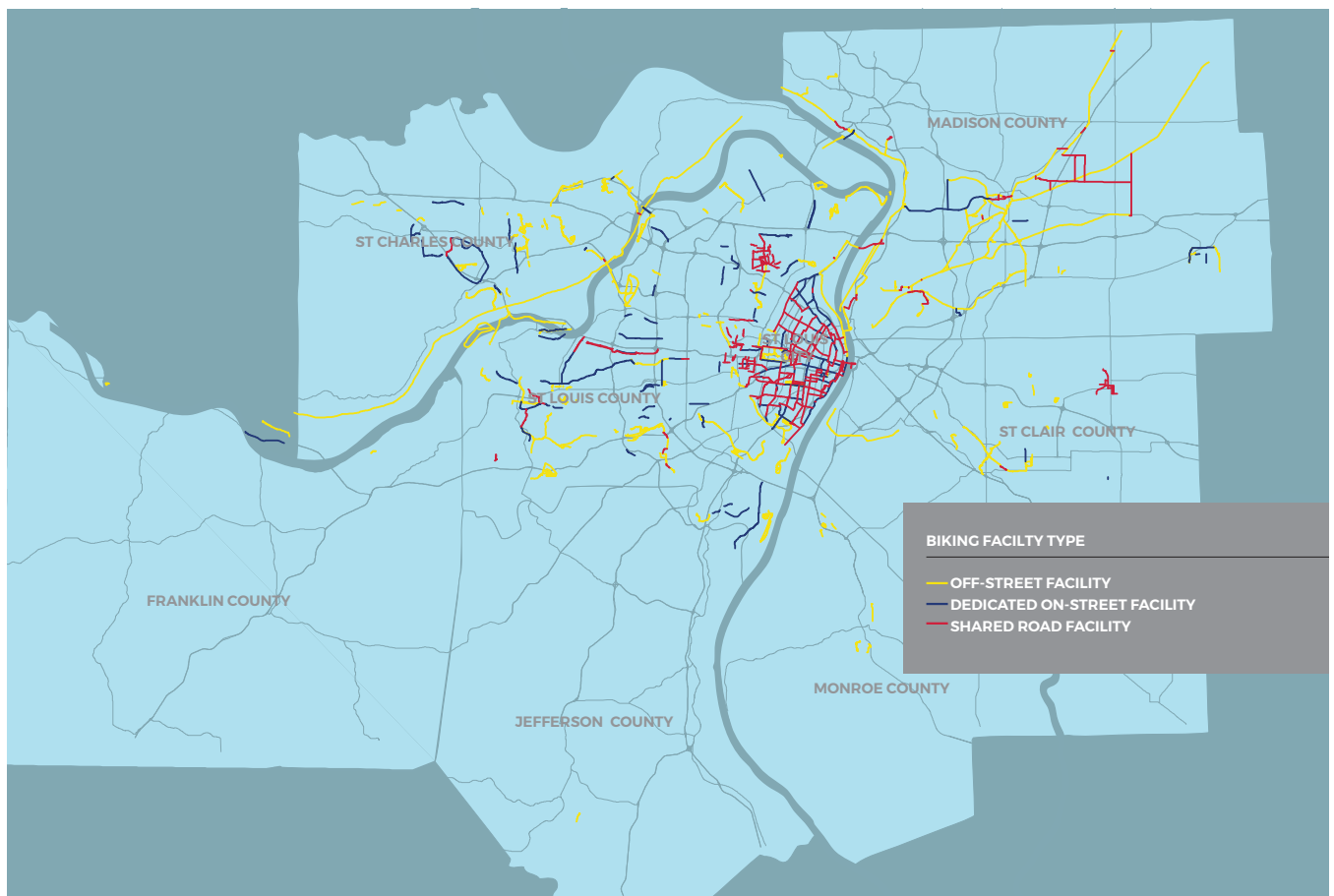
- An additional 90 miles of off-street trail will be completed in the next decade.
- By 2023, cyclists and hikers will be able to take from Jefferson Barracks Park in south St. Louis County to the Katy Trail, more than 20 miles away. The Katy Trail stretches a bikeable and walkable 235 miles across the

state of Missouri, and it's one of the longest continuous trails in the country.

- Plans are also in place for an on-road bike system of more than 1,000 miles through the City of St. Louis, St. Louis County, and parts of St. Charles. Completed scenic trails are located along the Mississippi River, in the Illinois counties of Madison and St. Clair, and along the Missouri river in St. Louis and St. Charles counties.
- GRG announced an international design competition that will result in a plan to connect Forest Park to the Washington University Medical Center & BJC, the Cortex Innovation District, the City Foundry STL and Armory projects, Grand Center Arts District, Saint Louis University, Harris-Stowe State University, Midtown, Downtown and the Gateway Arch, and the Mississippi Riverfront. With spurs north and south, the greenway will stretch five to seven miles, connecting area neighborhoods, employment centers, parks, transit, and dozens of cultural and educational institutions.

## Biking Facilities

ST. LOUIS METROPOLITAN AREA (September 29, 2017)



# List ranking of traffic congestion for community during peak commuting times

## Travel Time & Congestion

Travel Time Reliability (TTI) is a measure of average congestion that a person can expect to encounter. It is the ratio of travel time in the peak period (rush hour) to the travel time in free-flow conditions. St. Louis is the 20th most populous region in the country, but it has one of the lowest rates of congestion.

## Travel Time for Interstate Reliability

INTERSTATE VS. NON-INTERSTATE 2016

TABLE 1: TRAVEL TIME INDEX  
MORNING RUSH HOUR (6 TO 9 AM)

1	Indianapolis	1.13	26	Milwaukee	1.27
2	Birmingham	1.15	27	Minneapolis	1.27
3	Columbus	1.15	28	Riverside	1.27
4	Richmond	1.15	29	Pittsburgh	1.28
5	St. Louis	1.15	30	Tampa	1.28
6	Louisville	1.16	31	Dallas	1.29
7	Memphis	1.16	32	Atlanta	1.3
8	Cincinnati	1.17	33	Chicago	1.31
9	Kansas City	1.17	34	Denver	1.36
10	Oklahoma City	1.17	35	Virginia Beach	1.36
11	Salt Lake City	1.17	36	Baltimore	1.38
12	Cleveland	1.19	37	Houston	1.38
13	Las Vegas	1.21	38	Austin	1.39
14	San Antonio	1.21	39	Orlando	1.41
15	New Orleans	1.22	40	Miami	1.42
16	Phoenix	1.22	41	Portland	1.42
17	Buffalo	1.23	42	New York	1.44
18	Charlotte	1.23	43	Philadelphia	1.44
19	Hartford	1.23	44	San Diego	1.44
20	Providence	1.23	45	Washington, D.C.	1.46
21	Jacksonville	1.24	46	Seattle	1.48
22	Nashville	1.24	47	Boston	1.5
23	Raleigh	1.25	48	San Jose	1.57
24	Sacramento	1.25	49	San Francisco	1.64
25	Detroit	1.27	50	Los Angeles	1.88

Tables 1 & 2 show the TTI for the 50 most populous U.S. metropolitan regions. Residents and truck drivers in St. Louis can expect a trip to take 15 percent longer during morning rush hours than it would during a non-congested time of the day, and 22 percent longer in evening rush hours.

A trip that would take 30 minutes when there is no traffic will take about 35 minutes between 6 and 9 a.m., and about 37 minutes between 4 and 7 p.m. In Seattle, that 30-minute drive will take about 44 minutes during morning rush hour and 52 minutes during evening rush hour.

Data in Tables 1 and 2 are for truck and passenger miles, for weekdays only, and for interstates only.

TABLE 2: TRAVEL TIME INDEX  
EVENING RUSH HOUR (4 TO 7 PM)

1	Indianapolis	1.17	26	Charlotte	1.36
2	Richmond	1.17	27	Detroit	1.36
3	Birmingham	1.19	28	Pittsburgh	1.36
4	Kansas City	1.21	29	Tampa	1.41
5	Memphis	1.21	30	Dallas	1.42
6	Cleveland	1.22	31	Minneapolis	1.42
7	St. Louis	1.22	32	Chicago	1.45
8	Oklahoma City	1.24	33	Atlanta	1.46
9	Salt Lake City	1.24	34	Denver	1.47
10	Cincinnati	1.25	35	Baltimore	1.48
11	Columbus	1.25	36	Virginia Beach	1.57
12	Louisville	1.25	37	New York	1.59
13	Phoenix	1.25	38	Houston	1.6
14	Las Vegas	1.28	39	Miami	1.61
15	Jacksonville	1.3	40	Philadelphia	1.64
16	Buffalo	1.31	41	Boston	1.66
17	Riverside	1.31	42	San Diego	1.69
18	San Antonio	1.31	43	Washington, D.C.	1.69
19	Providence	1.32	44	Austin	1.71
20	Nashville	1.33	45	Seattle	1.74
21	Raleigh	1.33	46	Portland	1.8
22	Sacramento	1.33	47	Orlando	1.85
23	New Orleans	1.34	48	San Francisco	2.04
24	Hartford	1.35	49	San Jose	2.23
25	Milwaukee	1.35	50	Los Angeles	2.34

Source: Federal Highway Administration, National Performance Management Research Data Set  
Data is for truck and passenger vehicles. For weekdays only.

## Travel Time for Unexpected Delays

Planning Time Index (PTI) is similar to TTI, but in addition to typical delays, it also accounts for unexpected delays. PTI considers non-everyday congestion to determine the amount of time a person (or truck) should allow in order to be on time to an appointment. It indicates the consistency and dependability of a region's highway system. For St. Louis, the PTI and TTI are similar because St. Louis does not experience many unexpected traffic delays relative to other large metro regions.

Tables 3 and 4 provide the PTI for the 50 most populous U.S. regions for which data are available.

A resident in St. Louis who could drive to work in 30 minutes when traffic is free-flowing should plan on 43 minutes during the morning and 48 minutes during the evening rush hours. In Seattle, one would need to allow 70 minutes in the morning and 94 minutes in the evening.

Data in Tables 3 and 4 are for truck and passenger miles, for weekdays only, and for interstates only.

## Planning Time Index

INTERSTATE VS. NON-INTERSTATE 2016

**TABLE 3: PLANNING TIME INDEX**

### MORNING RUSH HOUR (6 TO 9 AM)

1	Indianapolis	1.32	26	Riverside	1.71
2	Richmond	1.33	27	Tampa	1.71
3	Birmingham	1.37	28	Atlanta	1.76
4	Memphis	1.38	29	Detroit	1.76
5	Oklahoma City	1.39	30	Milwaukee	1.82
6	Salt Lake City	1.41	31	Dallas	1.83
7	St. Louis	1.42	32	Chicago	1.86
8	Louisville	1.43	33	Minneapolis	1.87
9	Columbus	1.44	34	Denver	1.96
10	Kansas City	1.44	35	Austin	1.98
11	Las Vegas	1.47	36	Houston	2.04
12	Cincinnati	1.48	37	Virginia Beach	2.04
13	Phoenix	1.48	38	Baltimore	2.08
14	Cleveland	1.55	39	Orlando	2.15
15	New Orleans	1.57	40	Philadelphia	2.15
16	San Antonio	1.59	41	San Diego	2.16
17	Sacramento	1.62	42	Miami	2.18
18	Providence	1.63	43	New York	2.18
19	Jacksonville	1.64	44	Portland	2.22
20	Charlotte	1.65	45	Washington, D.C.	2.28
21	Hartford	1.65	46	Seattle	2.33
22	Buffalo	1.67	47	Boston	2.51
22	Nashville	1.67	48	San Jose	2.73
24	Pittsburgh	1.70	49	San Francisco	2.79
25	Raleigh	1.71	50	Los Angeles	3.25

**TABLE 4: PLANNING TIME INDEX**

### EVENING RUSH HOUR (4 TO 7 PM)

1	Richmond	1.43	26	Pittsburgh	2.04
2	Birmingham	1.49	27	Milwaukee	2.08
3	Indianapolis	1.50	28	Detroit	2.13
4	Memphis	1.54	29	Tampa	2.18
5	Phoenix	1.58	30	Atlanta	2.21
6	Kansas City	1.59	31	Dallas	2.22
7	St. Louis	1.59	32	Denver	2.26
8	Cleveland	1.64	33	Chicago	2.27
9	Salt Lake City	1.64	34	Minneapolis	2.39
10	Las Vegas	1.67	35	Baltimore	2.41
11	Oklahoma City	1.69	36	New York	2.54
12	Cincinnati	1.74	37	Miami	2.63
13	Columbus	1.79	38	Houston	2.65
14	Louisville	1.80	39	Austin	2.67
15	Jacksonville	1.81	40	Virginia Beach	2.74
16	Riverside	1.82	41	Philadelphia	2.77
17	Sacramento	1.86	42	San Diego	2.85
18	San Antonio	1.86	43	Washington, D.C.	2.87
19	Nashville	1.92	44	Boston	2.98
20	Providence	1.95	45	Seattle	3.12
21	Raleigh	1.95	46	Portland	3.33
22	Buffalo	1.96	47	Orlando	3.53
23	New Orleans	1.99	48	San Francisco	3.57
24	Hartford	2.02	49	Los Angeles	4.17
25	Charlotte	2.03	50	San Jose	4.17

Source: Federal Highway Administration, National Performance Management Research Data Set  
Data is for truck and passenger vehicles. For weekdays only.



Travel Time for Interstate Time Reliability

Table 5 shows the percent of person-miles traveled on interstates that are reliable, and Table 6 shows the percent traveled on non-interstates. For both measures, the St. Louis region ranks near the top with high proportions of people traveling on roadways that are considered reliable. On interstates in the St. Louis region, a majority of travel (82 percent) is taken on roads that have low-congestion. People move efficiently throughout the region due to a lack of congestion.

“Person-miles” are the users of the highway system and include bus, auto, and truck occupancy levels. Roadways are considered reliable when travel time varies little between free-flow and congested times of the day.

Data for tables 5, 6 and 7 are for urbanized areas of the metropolitan regions. Data is not available for all of the 50 most populous regions.

Interstate Travel Time Reliability Percentage

INTERSTATE VS. NON-INTERSTATE 2016

TABLE 5:  
INTERSTATE TRAVEL TIME RELIABILITY  
PERCENT OF PERSON-MILE TRAVELED

1	Kansas City	88.6	21	Miami	68.3
2	Cleveland	88.3	22	Atlanta	66.9
3	Pittsburgh	88.1	23	Sacramento	65.3
4	Memphis	87.2	24	Baltimore	64.5
5	Virginia Beach	83.7	25	Minneapolis	64.2
6	Providence	82.4	26	Chicago	63.5
7	St. Louis	82.4	27	Orlando	63.1
8	Milwaukee	77.9	28	Dallas	62.9
9	Columbus	77.9	29	San Diego	61.1
10	Cincinnati	76.8	30	Austin	59.0
11	Las Vegas	75.7	31	Boston	58.7
12	San Antonio	72.7	32	Denver	56.0
13	Tampa	72.7	33	Washington D.C.	54.1
14	New York	72.2	34	San Francisco	49.2
15	Salt Lake City	71.9	35	Houston	48.7
16	Charlotte	71.1	36	Portland	48.4
17	Riverside	69.8	37	Seattle	47.5
18	Philadelphia	69.3	38	Phoenix	47.2
19	Detroit	68.8	39	San Jose	45.7
20	Jacksonville	68.7	40	Los Angeles	41.1

TABLE 6:  
NON-INTERSTATE TRAVEL TIME RELIABILITY  
PERCENT OF PERSON-MILE TRAVELED

1	Kansas City	71.5	21	Washington D.C.	51.6
2	Minneapolis	69.6	22	Cincinnati	50.9
3	Orlando	64.3	23	Pittsburgh	49.7
4	Providence	60.0	24	Boston	49.6
5	Memphis	59.6	25	Denver	48.5
6	St. Louis	59.1	26	Charlotte	47.2
7	Jacksonville	58.8	27	San Antonio	46.7
8	Riverside	58.8	28	Cleveland	46.6
9	Tampa	58.6	29	Houston	46.2
10	Virginia Beach	58.4	30	Sacramento	45.2
11	Milwaukee	57.7	31	San Jose	44.4
12	Columbus	56.1	32	Austin	44.0
13	Baltimore	55.7	33	Portland	41.9
14	Philadelphia	55.5	34	Detroit	41.3
15	Phoenix	55.2	35	Miami	39.1
16	New York	54.8	36	Dallas	38.6
17	Las Vegas	53.3	37	Seattle	38.3
18	San Diego	53.3	38	Salt Lake City	37.7
19	Atlanta	52.9	39	San Francisco	37.4
20	Chicago	51.7	40	Los Angeles	30.1

Source: Federal Highway Administration, National Performance Management Research Data Set  
Data is for truck and passenger vehicles. For weekdays only.

## Commercial Attributes

In 2016, the Bi-State Development organization launched the St. Louis Regional Freightway, a public-private partnership designed to optimize the region's freight transportation network. With the U.S. Department of Transportation predicting a 30 percent growth in the freight industry over the next 25 years, St. Louis has the infrastructure to take advantage of that growth, and be among the premier multimodal freight hub and distribution centers in the nation.

According to a recent study by Modalistics, Greater St. Louis is the sixth largest center for wholesale trade not located on a coastal port or international border crossing. Factors contributing to this assessment include distribution costs up to 18 percent lower than the national average, access to competitive economic incentives, a labor pool of workers skilled in all areas of distribution and wholesale trade activities, a relatively low cost of living, and high quality of life. Additional highlights include:

- The five airports make it a convenient location to move cargo more easily and quickly than coastal cities.
- An interstate loop provides easy travel around the region and connects to large distribution parks throughout the metro area.
- In St. Clair County, an \$8.1 million River Bridge District Project, currently underway, is focused on transforming key sections of the East St. Louis Riverfront into a magnet for industry. The project allows for enhanced access for the burgeoning commercial traffic generated by Cargill and Bunge-SCF along the riverfront. The project is the final piece of substantial highway infrastructure improvements already made by state and federal partners in the immediate vicinity, including the relocation of Illinois Route 3 and the opening of the new Stan Musial Veteran's Memorial Bridge. In addition, the project will provide access to several hundred acres of undeveloped property that is ripe for investment.
- The Avenue of the Saints highway from St. Louis to St. Paul, MN, was completed in 2008 after 15 years of work. This 550-mile, high-priority, four-lane expressway adds yet another major spoke to St. Louis' interstate transportation hub.
- The concentration of interstate highway access enhances Greater St. Louis' position as a truck transportation center. The city has more than 1,000 businesses operating in the Truck Transportation industry with more than 500 in the General Freight Trucking industry.
- St. Louis is served by six interstate natural gas pipelines and nine refined product pipelines.
- The city is a logistics leader with substantial real estate: more than 15 million square feet of freight-based development in 20 years, plus massive amounts of available space for future development.
- The Bi-State Development Agency has a long history of regional development authority. The agency can cross local, county, and state boundaries to plan, construct, maintain, own, and operate facilities and infrastructure. It also is authorized to issue revenue bonds, collect fees, and receive federal, state, and private funds.

# Truck Travel Time Reliability Index

The Truck Travel Time Reliability graph at right measures efficiency of moving freight in a region. This measure considers factors that are important to the freight industry, including use of the system during all hours of the day, and an index used by the freight industry for planning on-time arrivals. It is the average performance of the system for an entire area – the St. Louis region ranks 9th among metro areas in freight times.

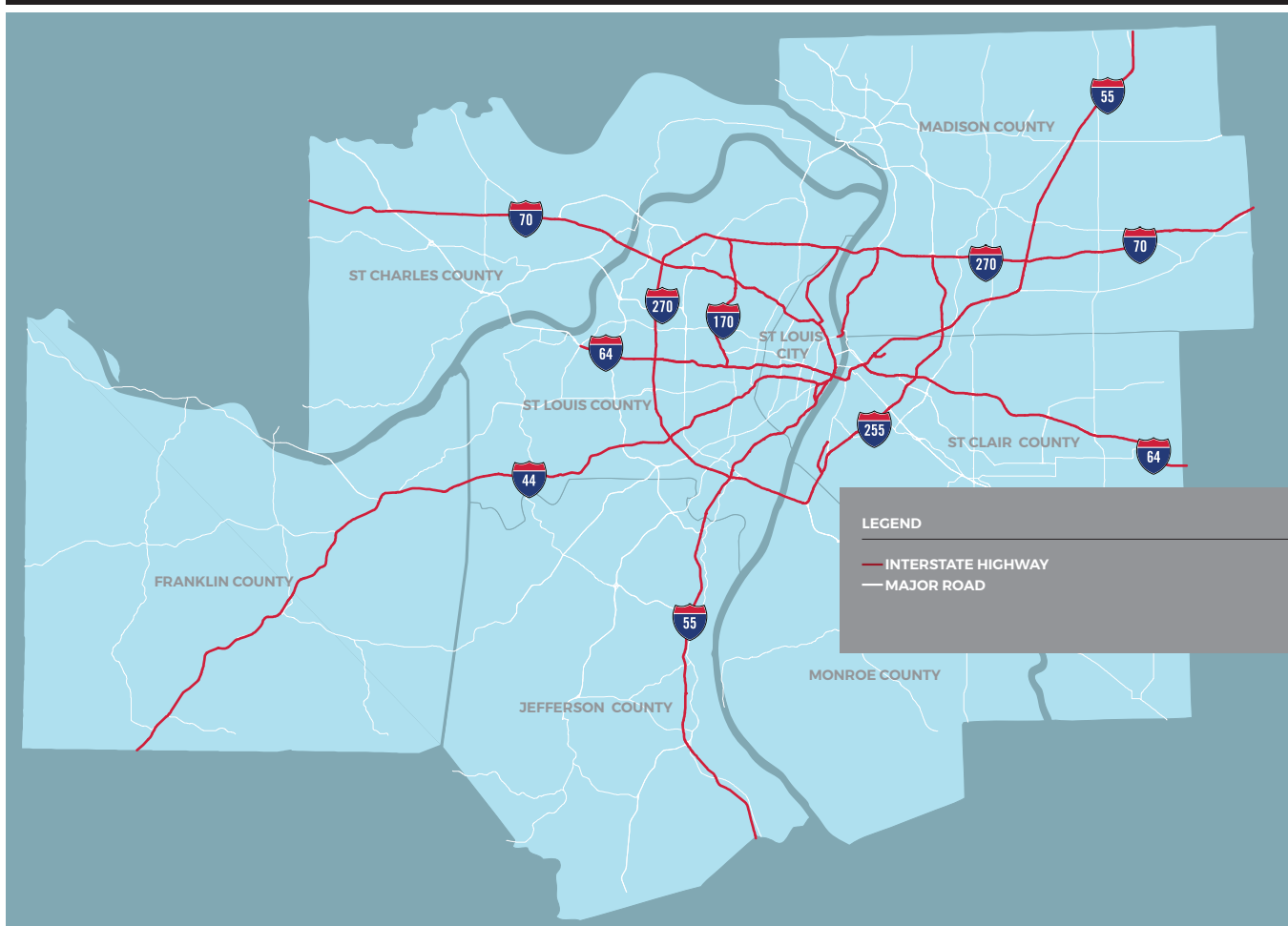
For shipping and logistics, a system for maintaining a skilled workforce is already in place. St. Louis has a variety of educational institutions producing drivers and well-trained, skilled labor. Ranken Technical College, for example, offers a two-year Associate of Applied Science degree in diesel technology.

TABLE 7:  
Truck Travel Time Reliability Index  
2016

1	Indianapolis	1.68	22	Denver	2.64
2	Cleveland	1.74	23	Orlando	2.71
3	Kansas City	1.86	24	Baltimore	2.73
4	Memphis	1.94	25	Dallas	2.77
5	Cincinnati	2.06	26	Boston	2.78
6	Tampa	2.08	27	Las Vegas	2.81
7	Charlotte	2.09	28	San Diego	2.82
8	Columbus	2.11	29	Virginia Beach	2.94
9	St. Louis	2.13	30	Riverside	2.95
10	Pittsburgh	2.20	31	Salt Lake City	2.96
11	Detroit	2.25	32	New York	2.99
12	Chicago	2.26	33	Minneapolis	3.01
13	Philadelphia	2.28	34	San Jose	3.20
14	Providence	2.28	35	Phoenix	3.29
15	Austin	2.29	36	San Francisco	3.44
16	San Antonio	2.29	37	Washington, D.C.	3.64
17	Jacksonville	2.34	38	Los Angeles	3.70
18	Atlanta	2.36	39	Portland	3.71
19	Milwaukee	2.43	40	Houston	3.81
20	Sacramento	2.55	41	Seattle	3.99
21	Miami	2.59			

## Primary Highway Freight

ST. LOUIS METROPOLITAN AREA (April 2016)





# RAIL

## Commuter Attributes

### MetroLink Light Rail

St. Louis' light rail system, MetroLink, has been called one of the best mass transit systems in the country. The clean, efficient system is buttressed by the region's two largest airports — St. Louis Lambert International Airport and MidAmerica St. Louis Airport — with 48 miles of track and stops at 37 Missouri and Illinois stations. Metro completed an eight-mile, \$676 million extension connecting the business center of Clayton and several inner ring suburbs. More than 14.9 million passengers rode MetroLink last year.

The trains pull into stations near many of St. Louis' attractions. Some of these include:

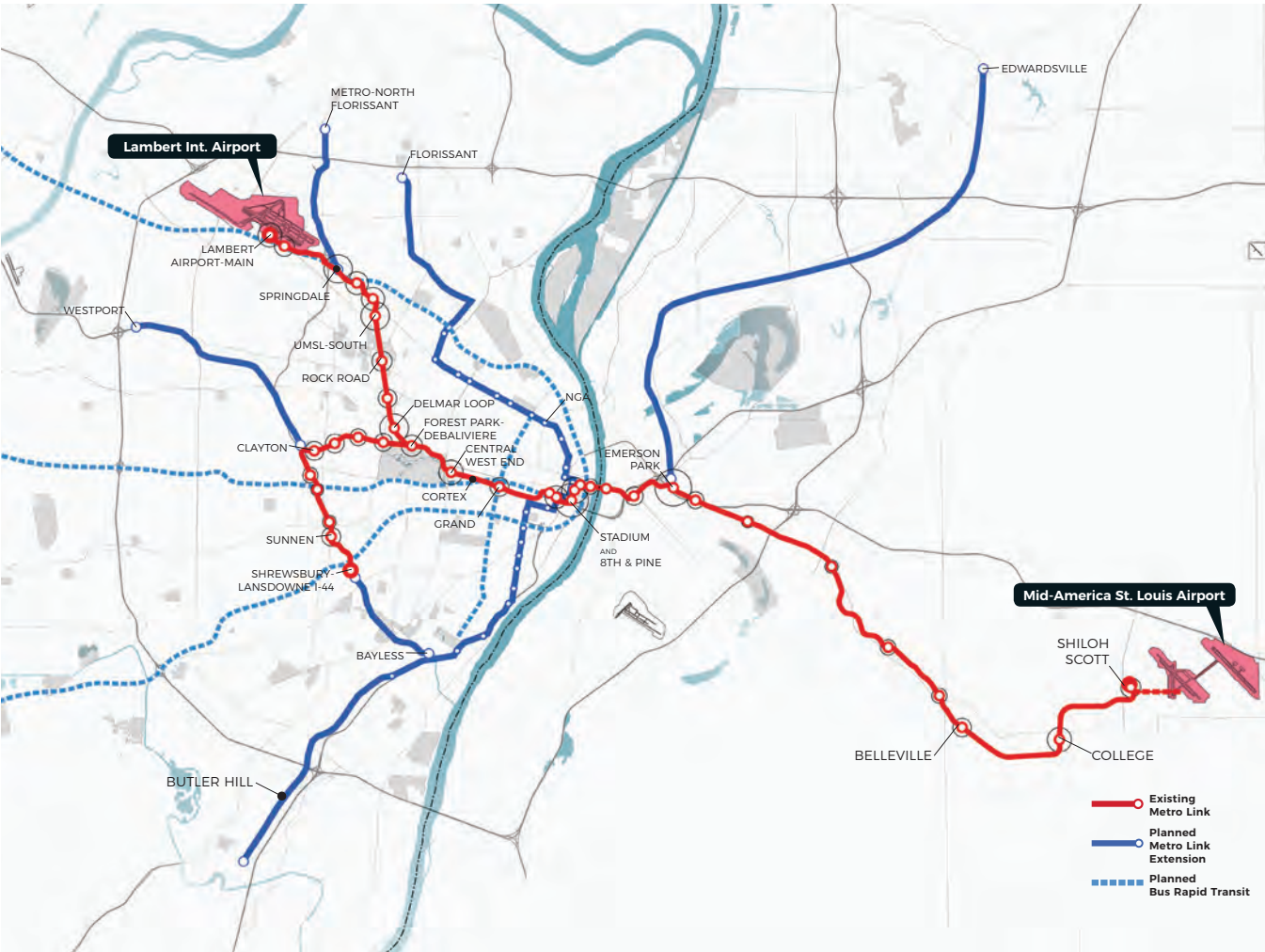
- **Clayton:** Shaw Park, dining, hotels, shopping
- **Skinker:** Washington University, Edison Theatre, Mildred Lane Kemper Museum of Art
- **UMSL St. Louis North:** University of Missouri – St. Louis, Blanche M. Touhill Performing Arts Center, Mercantile Library
- **Delmar/Loop:** St. Louis Walk of Fame, The Pageant, Blueberry Hill; named one of “10 Great Streets in America” by the American Planning Association

- **Forest Park:** St. Louis Zoo, Saint Louis Art Museum, History Museum, Science Center, The Muny
- **Central West End:** Central West End neighborhood, restaurants and boutiques, Cathedral Basilica of Saint Louis, BJC HealthCare
- **Grand:** Saint Louis University, Cupples House, Museum of Contemporary Religious Art, Grand Center entertainment district theaters, shops and restaurants, Pulitzer Foundation for the Arts, Contemporary Art Museum
- **Union Station:** Union Station festival marketplace, restaurants, entertainment, hotels
- **Civic Center:** Scottrade Center arena, City Hall, hotels
- **Stadium:** Busch Stadium, Ballpark Village, hotels
- **8th & Pine:** Central downtown, restaurants, Kiener Plaza, Citygarden, Old Courthouse, hotels
- **Arch/Laclede's Landing:** Lumiere Place, historic district, entertainment, restaurants, Gateway Arch, riverboat cruises, hotels

**Cost:** A one-way ride on MetroLink costs \$2.50. Tickets may be purchased and validated at each station. Tickets from the airport station to downtown cost \$4. Day passes for MetroLink and MetroBus are \$7.50. Trains run every seven minutes during rush hours, every 10 minutes during non-rush hours, and every 15 minutes in the evening during the week.

MetroLink lines

ST. LOUIS METROPOLITAN AREA (September 29, 2017)



Map of existing MetroLink stations







## Passenger Rail

Passenger service is available via Amtrak's daily service to Chicago, Dallas, and Kansas City from five St. Louis stations. In 2018, Amtrak's high-speed trains between Chicago and St. Louis are expected to run. The high-speed portion includes track upgrades, new track sidings to reduce delays and upgraded stations for the 250-mile project. The new locomotives, which run on diesel-electric engines and emit 90 percent less pollution, will travel at the 200-plus mph level, reducing travel time to four and a half hours between the two cities.

Additionally, the Amtrak station in St. Louis is conveniently located downtown. A \$10 million upgrade and expansion provides improved connection to 23 regional bus and express routes, MetroLink light rail, and Amtrak in one centralized location.

## Commercial Attributes

### Class 1 Railroads

The St. Louis region has the third-largest rail hub in the U.S. served by six Class 1 Railroads — Burlington Northern Santa Fe, Canadian

National Railway, CSX, Kansas City Southern, Norfolk Southern, and Union Pacific — that connect to five local and short line railroads. St. Louis is one of the few cities where rail traffic can transfer between, and originate from, both the eastern and western railroads.

The St. Louis Municipal River Terminal (MRT), which is located 1.5 miles north of downtown, has a rail spur into it from TRRA, the local short line owned by the Class One railroads, including Norfolk Southern. In addition, Norfolk Southern has its own tracking running along the western edge of the MRT.

Existing rail inside of the MRT comprises 5,300 feet of track and two switches. The operator configures the MRT's rail lines as needed to meet customer needs, including the installation of additional lines.

State-of-the-art intermodal freight facilities reduce cargo handling, improve security, reduce damages, and expedite shipment times. The six major facilities include: BNSF Intermodal, CSX Intermodal, Norfolk Southern Intermodal, America's Central Port, Triple Crown Services, and Union Pacific Intermodal.



# RIVER

## Commuter Attributes

Scenic views and a variety of river opportunities are available for outdoor activities on the Missouri and Mississippi rivers. Public access points along the rivers are available for fishing, hunting, and boating. Boat ramps are concrete, well maintained, and extra-wide. One can even cross the river on three ferries between Alton, Ill., and St. Charles, Mo. These include the Grafton Ferry, Brussels Ferry (North Dock), and the Golden Eagle Ferry. Prices and hours vary depending upon the season.

## Commercial Attributes

St. Louis' economy originated with trade. Missouri is now ranked 10th for inland waterway mileage (1,000 miles), moving an average of \$4.1 billion in cargo annually. St. Louis is also the third busiest inland port and the 17th largest U.S. port. Situated at the confluence of the Mississippi, Missouri, and Illinois rivers, St. Louis' location as the northernmost year-round ice-free port increases its competitive advantage. The Port of Metropolitan St. Louis is served by all major barge lines and offers more than 100 docks and terminal facilities, connecting the city industrial centers in 15 states located along the Mississippi, Missouri, Ohio, Illinois, and Tennessee Rivers, the Great Lakes, and the Gulf of Mexico. St. Louis is also the location of the southern-most lock and dam on the Mississippi.

The St. Louis Municipal River Terminal is located 1.5 miles north of downtown and has a newly refurbished, continuous 2,000-foot dock that can moor up to 10 barges simultaneously. The dock can accommodate standard and oversized containers as well as oversized project cargo such as construction steel members and heavy manufacturing equipment. Next to this dock is almost 1,000 feet of shore available for barge fleeting.



**COMMUNITY/  
QUALITY OF LIFE**





# COMMUNITY

## Quality of Life

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*“...I’d like to offer a personal take on why St. Louis is a perfect fit for HQ2. I’m a New York native who moved to St. Louis three years ago. I’ve worked in hi-tech since graduating from college... Amazon has invited me to interview 12 times in the last 24 months, and while working for Amazon is high on my bucket list, I’m not willing to give up the lifestyle of St. Louis and move to New York or Seattle. Here’s why:*

*My commute to work is five minutes. Parking my car and taking the elevator to my office takes longer than the drive does. In fact, my whole life is within a five-minute drive from my home, my kids’ school and doctors. I’ve given up going to the Costco that’s 15 minutes away because it’s too far. I buy my larger items on Amazon Prime, instead.*

*These may not seem like a big deal for many Midwest natives, but for those of us who only know the nosebleed real estate prices and cramped conditions found in big coastal cities, an affordable and livable region like St. Louis seems like a revelation.”*

– Sarah Glickfield

Posted in a letter to Jeff Bezos

## Why St. Louis?

### Quality of Life

St. Louis is a lively destination where ideas converge, collide, and are commercialized. The city is also a great place to live, and as congestion and cost of living go up in other top metro markets, the St. Louis region is becoming a destination location for both employers and employees. Plus, it's sunny here 202 days a year.

St. Louis' footprint in the heart of the Midwest is where more than 2.8 million residents — 750,000 of them millennials — experience a balance of convenience and affordability. St. Louis' recreational and cultural experiences are world-class, critically acclaimed, family-friendly, and many are free. Ranked the 20th largest metro area in the country, a Seattle resident could take a 36 percent pay cut and still enjoy the same standard of living in the St. Louis region.<sup>1</sup> According to the Federal Reserve Bank of St. Louis, the cost of living in the city is 10 percent below the U.S. average.

Forbes honored the city as the 7th Most Affordable City in 2017, and St. Louis is a past recipient of the All American City Award. St. Louis also received the 2017 top ranking from both Business Insider and The Penny Hoarder as the place where millennials can best afford to work and live; it was dubbed second for affordability, fourth for millennial happiness and 11th for economic health.

And, it's a welcoming home for new residents. St. Louis was recognized by the American Community Survey report as the second-fastest growing metro area for the foreign-born population out of the nation's largest cities. St. Louis has the largest Bosnian population — 70,000 — in the country, and the largest population outside Europe. Since 2010, the St. Louis area has experienced a 53 percent population growth in racial minorities, which is contributing to economic growth and increased diversity supplier fulfillment.

Helping foreign-born St. Louisans acclimate to their new surroundings are the International Institute of St. Louis, as well as the Asian American, African, and Hispanic Chambers of Commerce, among other organizations. Excited by transformation of the city, the St. Louis Mosaic Project, a regional initiative

within the St. Louis Economic Development Partnership and the World Trade Center of St. Louis, has set a goal of transforming St. Louis into the fastest-growing metropolitan area for immigration by 2020.

Based on the 2010 Census, some communities in the region saw the Latino population increase by 72 percent. Additionally, the region is also experiencing rapid growth in the Hispanic population in Southwestern Illinois. Regionally, Latino-owned businesses are contributing more than \$1.7 billion in sales revenue. This offers Amazon an opportunity for diverse and bilingual talent.

In addition, it should be noted St. Louis is one of only 11 cities in the country, and the only one in the Midwest, to receive a perfect 100 every year since 2012, when the Human Rights Campaign (HRC) began rating cities on a Municipal Equality Index (MEI). Thirteen companies headquartered in St. Louis also scored a perfect 100. Also, St. Louis is host to one of the Midwest's largest PrideFests, with attendance topping 300,000 in 2017.

St. Louis is generous, too. In 2017, Charity Navigator ranked St. Louis among the top three most philanthropic communities in the United States. The United Way of Greater St. Louis raised a record amount of more than \$75 million in its 2016 campaign, and nearly 40% of total funds raised came from corporations donating \$1 million or more. Additionally, more than 100,000 residents and 2,200 companies donated to the United Way's 2016 campaign, which helps one in three people throughout the greater St. Louis region.

St. Louis also offers a reasonable cost of living and relatively short drive times. Rush hour in 2015 averaged 25.6 minutes, with significantly less congestion than metro areas of similar size. Most housing stock is within direct access to a main highway or interstate. Parking in downtown is abundant, and one can easily access work, parks, restaurants, and entertainment by car, the city's light rail system, or by biking, or walking.

From parks to ballparks, museums to music venues, St. Louis inspires creativity, innovation, and exploration. It's a place where grit, hustle, pride, and an indefatigable work ethic are inextricably linked.

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<sup>1</sup> Federal Reserve Bank of St. Louis, 2017

# Population Diversity

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Diverse populations have driven growth and change in the St. Louis region, and will continue to do so for decades to come. The Greater St. Louis area has an estimated population of 2.8 million, making it the 20th largest MSA in the U.S. Greater St. Louis' population has grown by 77,633 between 2006-2016.

St. Charles County is the second-largest county in Greater St. Louis and one of the fastest-growing in the state. Between 2000 and 2010, the county grew by 27 percent to a population of 360,485.

Growth highlights from 2000 to 2010 include:

- The Latino population experienced the largest growth, at a rate just over 78 percent.
- The Asian population grew more than 51 percent.
- The African American population grew by almost 8 percent.
- The Native American population saw growth of 1.3 percent.

In addition, St. Louis boasts the largest Bosnian population in the country, and the largest population outside Europe. Immigrants are a major source of new workforce talent for St. Louis employers. The foreign-born community in the region is highly educated with predominantly white-collar jobs. They tend to be scientists, professionals, and managers, and are 44 percent more likely to have at least a college education and 130 percent more likely to have an advanced degree.

For St. Louis, foreign-born gains reflect an increase of about 10,623 new residents — an 8.9 percent increase in one year, the largest percentage increase of any of the nation's 20 largest metro areas, Seattle included. The Mosaic Project, an organization that welcomes immigrants to the region, is an integral resource for skilled immigrants new to St. Louis seeking support with personal and professional networking. Also, the International Institute of St. Louis, founded in 1919, integrates thousands of immigrants and refugees from all over the world each year, serving as a national role model for their programming.

There are several organizations in St. Louis that work with new residents to welcome and integrate them into the community regardless of ethnic background:

- St. Louis Transplants helps new St. Louisans acclimate. Experts answer questions like “Where can I meet new friends?” “Who’s going to style my hair now?” and “Where can I find authentic Indian foods?” The organization plays the part of the social relocation genie. Members host everything from dinners to game nights to welcome new arrivals.
- The Regional Business Council’s Young Professionals Network attracts and retains talent to the region and gives these future leaders unique opportunities for networking, professional development, and community involvement. The network is open to diverse professionals of all nationalities under 40. There is no membership fee, as programming is made possible by the Boeing Company, Ascension, Centric Group, Edward Jones, Enterprise, Equifax, Regional Business Council, RubinBrown, UMB Bank, and Wells Fargo Advisors.
- Launched in 2001 by the St. Louis Regional Chamber, the St. Louis Business Diversity Initiative has established a series of programs to help companies, minority employees, and vendors expand their business inclusivity and welcome new talent into St. Louis. From skill-building, to monthly networking opportunities, to sharing the best practices, the initiative’s training program provides professionals of color opportunity to leverage themselves into positions of power, influence, and authority while retaining these professionals in the St. Louis region. Over 30 of the region’s leading institutions have enrolled more than 180 of their minority employees in the initiative’s programs. Participants must be nominated and focused on mid- to senior-level positions.
- FOCUS St. Louis is a nonprofit leadership development organization. Among their many programs is the multisession orientation for relocated spouses and new executives.
- Olio City is a homegrown St. Louis startup that created a free expansive city-discovery app that’s personalized to one’s preferences. Pizza, burgers? Olio will show you where to go. In the mood for music? Olio City lists all the concerts taking place in the area and even has a link to buy tickets directly from the app.
- Explore St. Louis is the city’s official tourism organization that connects people to all the restaurants, hotels, entertainment, nightlife, and various points of interest.





## Equity and Inclusion

From Dred Scott to Michael Brown and the Ferguson uprising, city officials, corporations, and nonprofit partners continue with the difficult work of transcending decades of inequality in the U.S. to ensure St. Louis is a model of inclusion and social justice for the nation. The working mantra is that our community will not be defined by recent events, but rather by what we do in response.

The Ferguson Commission's Ferguson Report is a national blueprint for the St. Louis region and addresses multiple equality and social justice initiatives. While the problems faced by St. Louis are universal for many American cities, St. Louis is poised to lead national conversations to find solutions that build stronger and more resilient communities for all residents. (Details on specific initiatives with regard to the Ferguson Report, as well as corporate involvement, appear in Section 9 of this proposal.)



# Educational Opportunities for Amazonians

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For families, educational opportunities in St. Louis are expansive — from public to private to charter and magnet schools — there are many options at the K-12 levels. The St. Louis metro area has more than 160 public school districts that include more than 800 public schools and nearly 300 private K-12 schools, with the number of students totaling 396,465 and 67,110, respectively. More than 50 postsecondary two- and four-year institutions are also available. In addition, continuing education and professional development opportunities are also available for employees and their families.

A few suggested K-12 comparisons to Seattle schools:

- **Mercer Island:** Clayton, Ladue, and Parkway West public school districts
- **Bellevue Public School:** Parkway and Rockwood public school districts
- **Kirkland:** Kirkwood, Lindbergh, or Lafayette public school districts
- **Redmond School District:** Parkway and Rockwood public school districts
- **Lakeside:** John Burroughs School (private, independent)
- **Overlake School:** Mary Institute Country Day School (MICDS, private, independent)

Both Newsweek (2016) and U.S. New & World Report (2017) ranked several St. Louis high schools among the best in the U.S.:

Newsweek

America's Top High Schools 2016

- Clayton High School — Clayton, MO (42nd)
- Lafayette High School — Wildwood, MO (75th)
- Valley Park High School — Valley Park, MO (257th)
- Lindbergh High School — St. Louis, MO (343rd)
- Kirkwood High School — St. Louis, MO (362nd)
- Fort Zumwalt West High School — O'Fallon, MO (432nd)

*U.S. News & World Report*

America's Best High Schools 2017

- Metro Academic & Classical — St. Louis, MO (133rd)

- Ladue Horton Watkins — Ladue, MO (363rd)
- Clayton High School — Clayton, MO (504th)
- Lafayette High School — St. Louis County, MO (617th)
- Kirkwood High School — Kirkwood, MO (653rd)
- Marquette High School — Chesterfield, MO (773rd)
- Lindbergh High School — St. Louis, MO (1071st)
- McKinley Classical Leadership Academy — St. Louis, MO (1,407th)
- Francis Howell High — St. Charles, MO (1,506th)
- Parkway West High School — Ballwin, MO (1,571st)
- Parkway South High School — Manchester, MO (1,714th)
- Webster Groves High — Webster Groves, MO (1,905th)
- Francis Howell Central High — St. Charles, MO (1,959th)
- Valley Park Senior High — Valley Park, MO (2,345th)
- Central High — Chesterfield, MO (2,416th)
- Ft. Zumwalt South High — St. Peters, MO (2,479th)

## Independent Schools of St. Louis

Forty-four of the region's most highly acclaimed private schools make up the Independent Schools of St. Louis. Each of these schools has its own mission and culture to fit the needs of each individual child and family. Options exist for children as young as 16 months to grade 12 in co-ed, single-gender, religiously affiliated and nondenominational settings. ISSL member schools are fully accredited by the Independent Schools Association of the Central States (ISACS) or AdvancED. Following is a list of these schools:

ISSL Member Schools include:

- Academy of the Sacred Heart
- Andrews Academy, Creve Coeur
- Andrews Academy, Lake St. Louis
- Barat Academy
- Central Christian School
- Chaminade College Preparatory School
- Chesterfield Day School
- Chesterfield Montessori School
- Christian Brothers College High School
- Churchill Center & School for Learning Disabilities
- City Academy
- The College School
- Community School

- Cor Jesu Academy
- Crossroads College Preparatory School
- De Smet Jesuit High School
- Forsyth School
- The Fulton School at St. Albans
- Great Circle (Edgewood Children's Center)
- John Burroughs School
- Kirk Day School
- Logos School
- MAP St. Louis
- Mary Institute and St. Louis Country Day School (MICDS)
- Miriam Academy
- Miriam School
- Missouri Military Academy
- Nerinx Hall
- New City School
- The Principia School
- Rohan Woods School
- Rossman School
- Saint Louis Priory School
- Saul Mirowitz Jewish Community School
- St. John Vianney High School
- St. Joseph's Academy
- The St. Michael School of Clayton
- Thomas Jefferson School
- Ursuline Academy
- Villa Duchesne and Oak Hill School
- Visitation Academy
- Westminster Christian Academy
- Whitfield School
- The Wilson School

(For details on post-secondary institutions, reference Section 6)

## Southwestern Illinois Schools

St. Clair County provides numerous educational opportunities, including public, private, and charter school options. St. Clair County has 27 public K-12 districts with 72 buildings serving almost 42,000 students. There are also 20 nonpublic K-12 schools that serve almost 5,000 students throughout the county. Higher education is also well represented. Southwestern Illinois College (the largest community college south of Chicago) provides two-year associates degrees and over 150 certificate programs to 20,000 (including 8,000 veterans) students. Two, four-year private universities — McKendree University and Lindenwood University — are also located in St. Clair County. Less than 30 miles north in Madison County is Southern Illinois University — Edwardsville. Located just 15 minutes from St. Louis, many Illinois students attend the St. Louis postsecondary institutions.

Several St. Clair County high schools and districts have received national recognition.

### U.S. News & World Report (2017)

- Belleville West High School
- Belleville East High School
- Marissa Jr./Senior High School
- Mascoutah High School
- O'Fallon High School
- SIU East St. Louis Charter High School

### Niche (for Newsweek) Grades for County Districts

The following districts received a B- or higher in the 2017 rating. These districts represent 57% of public school students in St. Clair County.

- Belleville Grade School Districts
- Belleville High School
- Freeburg Grade School District
- Freeburg High School District
- High Mount Grade School District
- Mascoutah Unit District
- O'Fallon Grade School District
- O'Fallon High School District
- St. Libory Grade School District
- Shiloh Grade School District
- Signal Hill Grade School District
- Smithton Grade School District
- Wolf Branch Grade School District

Two nonpublic high schools were also graded by Niche:

- Governor French
- Althoff

### Illinois Blue Ribbon Schools

- Ellis Elementary
- Henry Raab Elementary
- Belleville Elementary School District
- Union Elementary
- Abraham Lincoln Elementary

### National Schools and Districts of Character

- Jefferson Elementary
- Henry Raab Elementary

A variety of strong partnerships strengthen educational opportunities from Pre-K to post-secondary. These partnerships include:

- East Side Aligned (Collective Impact)
- K-12 and SWIC – Running Start allows 16- and 17-year-old students to complete high school and earn an Associates degree simultaneously.
- Get Up & Go — Heath Department and K-12
- Scott Air Force Base and K-12 — STEM Programs
- K-12 and IL Math and Science Academy — STEM Programs





## **Entertainment & Recreational Opportunities**

St. Louis has a wide variety of entertainment that offers something for everyone. Every hour. Every day. All year long. The St. Louis region balances convenience and affordability with the cultural and entertainment amenities of a major metropolitan area.

Missouri, and St. Louis in particular, also have a robust tourism industry that provides 125,000 tourism-related jobs. Pick your pleasure — the region has an extensive parks system, including an abundance of dog parks, and an expanding trails and greenway network. The area is a destination location for outdoor enthusiasts and a central starting point for weekend getaways to nearby cities. Seventy golf courses, 140 parks, the 235-mile Katy Trail, hundreds of hiking and biking trails, 64 craft breweries, 40 wineries, eight lakes within a one-hour drive, numerous caves for spelunking, farms, orchards, and observatories await one's arrival.

Many of the activities are free to very affordable. Listen to the St. Louis Symphony perform on Art Hill, watch Shakespeare come to life on starry nights in Forest Park, visit the St. Louis Zoo, watch a musical at the Muny, spend a day at the Festival of Nations in Tower Grove Park, watch the zany adult costume contest

on Halloween in the Central West End, visit the Saint Louis Art Museum, or spend the day in the city's crown jewel, Forest Park — all for free.

And speaking of parks — officially christened in 1876, Forest Park is one of the largest urban parks in the country, outsize even Central Park in New York City. At 15 million annual visitors, more people visit Forest Park than the Golden Gate Park in San Francisco, the Griffith Park in Los Angeles, and the Riverwalk in San Antonio, to name a few.

The Zoo, the Art Museum, the Saint Louis Science Center, Missouri History Museum and the Muny, the largest outdoor theater in the country, are within the borders of Forest Park. The 1,293-acre green space serves as a haven for bikers, hikers, sports enthusiasts, and picnickers. Just bring your bike, blanket, or picnic basket to enjoy. The park also plays host to a variety of cultural events, including the Great Forest Park Balloon Race, LouFest Music Festival (like Seattle's Bumbershoot), Shakespeare Festival of St. Louis, St. Louis Earth Day Festival, St. Louis African Arts Festival, St. Louis Wine Festival, Brewers Heritage Festival, and the St. Louis Micro-Fest microbrewery showcase.

In addition to Forest Park, St. Louisans are very proud of their Arch. Towering 630 feet above the St. Louis riverfront, Eero Saarinen's beloved stainless steel Arch is an architectural marvel. Twice the height of the Statue of Liberty, the Arch attracts four million visitors annually. Sixty-three stories tall, yet only 17 feet wide at the top, visitors can sometimes feel the 18-inch sway while photographing the view below. From its 16 paneled windows at the top, one can gaze 30 miles in either direction, peek inside Busch Stadium, see the famous Budweiser sign that adorns the world's largest brewery, and marvel at a spectacular view of both sides of the river. The Arch grounds, part of the Jefferson National Expansion Memorial and the National Park Service, just underwent a \$380 million renovation, and will re-open in the summer of 2018.

The Arch grounds anchor the end of Market Street, the city's central traffic spine and the center of downtown's resurgence. Along its path, visitors will find the redevelopment of Kiener Plaza and Soldier's Memorial, leading right up to Union Station, which itself is in the process of being transformed to include a revamped hotel, a 200-foot-high Ferris wheel, and an aquarium.

Additional amenities near the proposed River Campus include the 11-time world-champion St. Louis Cardinals and the St. Louis Blues. The area is also a hub for many NCAA basketball games, top international soccer matches, music concerts, and more. Other affordable sites include free tours of the Anheuser-Busch brewery, Schlafly Bottleworks & Tap Room, and a multitude of bars and restaurants that cater to all.

More adventure can be found at the insanely fun City Museum. Voted No. 1 Family Attraction in the World by Trip.com — the City Museum is a one-of-a-kind playhouse for adults and kids alike. The larger play area is made from repurposed architectural and industrial objects housed in the 600,000-square-foot former International Shoe building in the Washington Avenue Loft District. The brainchild of internationally acclaimed artist Bob Cassilly, a classically trained sculptor and serial entrepreneur, the museum has won local and international awards as a must-see destination.

Readers can gather at the century-old St. Louis Public Library — Central Branch, located just a few blocks down from the museum. Its recent \$70 million historic restoration received a 2014 Institute Honor Award for Architecture. The impressive facility provides plenty of diverse, free programs for both kids and adults year-round.

For art enthusiasts, there is no better spot than the Grand Center Arts District, located just minutes from downtown. Recognized as the cultural hub of the region, nearly two million guests filter through the Grand Center Arts District annually, whether as patrons of the Saint Louis Symphony Orchestra — the second-oldest symphony in the country — at Powell Hall, The Fabulous Fox Theatre, the Sheldon Concert Hall and Art Galleries, the Pulitzer Foundation for the Arts, the Kranzberg Arts Center, or the Contemporary Art Museum St. Louis.

Music venues in Grand Center appeal to every mood and style as well. The sounds of living legends as well as rising stars emanate from Jazz at the Bistro, the intimate performance space that offers cabaret seating, dinner, and drinks. Saxophonist David Sanborn, pianist Peter Martin, and Freddy Cole and the Wynton Marsalis Jazz Band are just a few of the jazz greats who grace the stage. Additional music venues that cater to every genre include the Dark Room, Curtain Call Lounge, and the Stage at KDHX, and are just a short walk away. A weekly Wednesday Night Walking Jazz Crawl tours three different locations each week.

In a one-block area on Washington Avenue in Grand Center, art lovers can peruse the contrasting exhibits at four museums and galleries right across the street from each other. Others, including the McNamee Gallery at SLU and the Moto Museum, are located just a short walk in either direction. The International Photography Hall of Fame provides a unique look into the minds of famous photographers such as Ansel Adams, Diane Arbus, Margaret Bourke, and Mathew Brady. Interactive digital displays provide a different lens from which to appreciate the work.

Grand Center also serves as public media hub for KDHX Radio, the Beacon, Nine Network and St. Louis Public Broadcasting station.





## Attractions within walking distance from proposed River Campus

Laclede's Landing Historic District; the Arch and riverfront; City Museum, the unconventional playground for adults and kids; the National Blues Museum; Ballpark Village, located outside of Busch Stadium; Citygarden; the Eads Bridge, which has a pedestrian lane across the Mississippi River; and the Anheuser-Busch Brewery.

## 10-15 minutes from downtown

Grand Center Arts District, Jazz at the Bistro; the Fox Theatre; South Grand neighborhood known for its international restaurants and shops; Stray Dog Theatre; Cherokee Street; the International Photography Hall of Fame; Urban Chestnut Brewing Co.; Forest Park; Saint Louis Zoo; Missouri History Museum; Saint Louis Science Center; The Saint Louis Art Museum; The Muny; The Jewel Box; Turtle Playground; the Forest Park Boat House; Central West End, a neighborhood full of chic galleries, boutiques and sidewalk cafés; Missouri Botanical Garden; St. Louis Opera Theater; The Magic House, St. Louis Children's Museum; St. Louis Black

Repertory Company, the country's premier African-American theatre; Cahokia Mounds, the Southern Illinois pre-Columbian Native American city; and Gateway Motorsports Park, located directly across the Mississippi River.

## 30 minutes from downtown

St. Charles County, located at the confluence of the Mississippi and Missouri rivers, is a hub for boating, water skiing and jet skiing. Dockside bars and restaurants on both sides of the river, including Alton, Illinois, are weekend hotspots. One can also eagle watch at Pere Marquette State Park in Grafton, Ill. Visit the Lewis and Clark State Historic Site at the confluence of the Mississippi and Missouri Rivers. Nature lovers can visit the August A. Busch Memorial Conservation Area, the origin of the 237-mile trail at Katy Trail State Park, the Lewis and Clark Boat House and Nature Center, and the cobblestone streets of its historic district. The area is also home to the Weinstrasse, or Missouri Wine Road, which offers 40 wineries, the highest concentration in the Midwest. Visit the 43+ acre archaeological and paleontological site, Mastodon State Historic Park.



## 50–100 miles from downtown

Six Flags St. Louis, Mark Twain State Park, Hahn State Park, Carlyle Lake (IL), Watershed Nature Center (Edwardsville, IL), Lake Springfield (IL), Rend Lake (Illinois). One can also walk the streets of Mark Twain's boyhood home in Hannibal, Mo.

## 200–300 miles from downtown

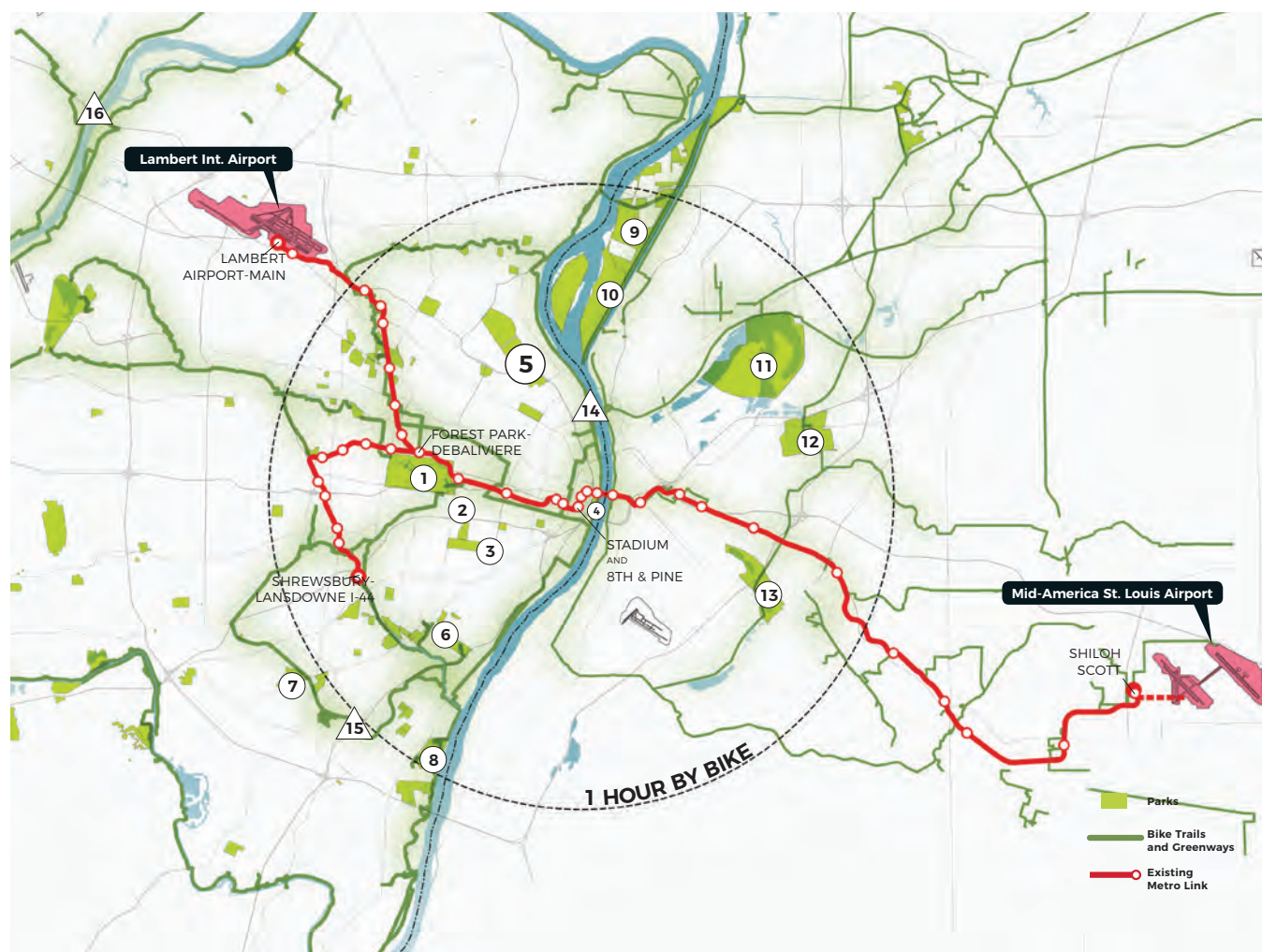
Table Rock Lake, Branson, Missouri; Lake of the Ozarks; multiple bed and breakfast options, Chicago, Nashville, Memphis and Kansas City.

## Trails — Cycling, Hiking

Cycling is one of the region's most popular and fastest-growing pastimes and modes of transportation. The bi-state area has several local cycling organizations.

In 2015, Money Crashers recognized St. Louis as one of the "10 Best Cities to Live in Without A Car — Benefits of a Car-free Lifestyle." Three years earlier, the city was named a Bicycle Friendly Community by the League of American Bicyclists. The league recognized the region for its innovative and remarkable progress, including more than 75 miles of on-street designated bicycle lanes and the McKinley Bridge Bikeway and Trestle, a 3,000-foot-long cantilevered bicycle lane spanning the Mississippi River, developed by Great Rivers Greenway. Some exciting updates include:

- Great Rivers Greenway is completing an additional 90 miles of off-street trails and greenways over the next decade. By 2023, cyclists and hikers will be able to bike and walk from Jefferson Barracks Park in south St. Louis County to the Katy Trail State Park, more than 20 miles away.
- An international design competition, just announced by Great Rivers Greenway, will result in a plan to connect Forest Park to Washington University Medical Center & BJC, the Cortex Innovation District, the City Foundry STL and Armory projects, Grand Center Arts District, Saint Louis University, Harris-Stowe State University, Midtown, Downtown and the Gateway Arch, and the Mississippi Riverfront, home of the proposed HQ2. With spurs north and south, the greenway will stretch five to seven miles, connecting area neighborhoods, employment centers, parks, transit, and dozens of cultural and educational institutions.
- In Southern Illinois there are 177 miles of bike trails, a majority of which are interconnected and asphalt. The trails, known as the Madison County Transit (MCT), include nine scenic bike trails connecting 20 communities along the former railroad. Covering 1,500 acres of greenways and containing 46 bridges and 25 tunnels, the MCT are considered "Class One," meaning they are completely independent of road traffic. The nine bikeways are famous for their seven interconnected loops, which prevent cyclists from having to pass the same place twice.
- When it's completed in 2019, the 2.6-mile phase of the Metro East RiverFront Trail will connect with more than 200 miles of bikeway trails in both Missouri and Illinois. The trail will complete the final leg of a "figure eight" along both sides of the Mississippi River, totaling a length of 25 miles start to finish, and linking the Arch, Malcolm W. Martin Memorial Park/Fountain, Chain of Rocks Bridge, Eads Bridge, and the McKinley Bridge. A pedestrian structure will span the railway tracks directly adjacent to River Campus. Traversing nearly two miles on top of the existing levee system, cyclists and hikers will have some great views of the riverfront.



	PARKS
1	Forest Park
2	Missouri Botanical Garden
3	Tower Grove Park
4	Jefferson National Expansion Memorial
5	Bellefontaine Cemetery
6	Carondelet Park
7	Grant's Farm
8	Jefferson Barracks County Park
9	Chouteau Island
10	Gabaret Island
11	Horseshoe Lake State Park
12	Cahokia Mounds State Historic Site
13	Frank Holten State Park

	GREENWAYS
14	Mississippi River Greenway
15	Grant's Trail
16	Katy Trail

## Culinary Scene

“The food in St. Louis is seriously good right now,” is a recent headline from Food & Wine. The publication goes on to say, “From nationally renowned (and award-winning) fine dining to Filipino street food to a vibrant little Bosnian restaurant scene to new ideas on old fronts (yes, like barbecue), don’t just stop in St. Louis if you happen to be passing through — make a date with the city, come here, and eat the best of what it’s offering, right now.” We couldn’t have said it better. St. Louis caters to all palates, and offers elegant dining, fantastic food trucks, and outstanding wine/craft cocktail bars.

## Beer, Beer, and More Beer

Sample Anheuser-Busch beers and snap photos of the world-famous Budweiser Clydesdales at Grant’s Farm, take a brewery tour at the Anheuser-Busch brewery, or belly up to the bar at a local microbrewery. St. Louis is a beer city owing a great deal of its early industrial history to the beer barons who built the Anheuser Busch, Lemp, and Falstaff dynasties. Microbreweries have a strong presence in the region, and the following, nonexhaustive list shows the density of the activity in St. Louis’ ongoing love affair with beer.

- Urban Chestnut Brewing Company - Grove Brewery & Bierhall
- The Civil Life Brewing Company
- Heavy Riff Brewing Company
- Square One Brewery & Distillery
- Urban Chestnut Brewing Company - Midtown Brewery & Biergarten
- Cathedral Square Brewery
- Augusta Brewing Company
- O’Fallon Brewery
- Alpha Brewing Company
- Kirkwood Station Brewing Company
- Earthbound Brewing
- Griesedieck Brothers Brewery
- Morgan Street Brewery
- William K Busch Brewing Company
- Anheuser-Busch
- Latrobe Brewing Co.
- 4 Hands Brewing Co.

## Dog Friendly

Ralston Purina first hung its iconic checkerboard in St. Louis, and the pet-care industry has maintained a foothold in St. Louis for more than a century with companies such as Manna Pro, Novus, Solid Gold, Nature’s Variety, Nestlé-Purina, and more. The region is very dog-friendly with numerous dog parks, pet-friendly hotels, outdoor eateries, cafés, and pet-centric events. Fueled by local pet-loving businesses and neighborhoods, St. Louis is on a mission to become the most pet-friendly city in the U.S. From building dog parks in the heart of downtown in Lucas Park and on Laclede’s Landing, to opening the city’s first permanent cat café in Maplewood, to creating more pet-friendly work places and public spaces, St. Louis is a great city for pets and people to live, work and play together.

- Broemmelsiek Dog Park
- Burger Dog Park
- Chesterfield Dog Park (at Eberwein Park)
- Gateway Arch Dog Park (in planning)
- Bark Park at Unger (coming soon)
- Creve Coeur Dog Park (at Conway Park)
- Dogport Dog Park
- DuSable Dog Park (at Ed Boles Memorial Park)
- Florissant Dog Park (at Duchesne Park)
- Paw Park (at Arnold City Park)
- Quail Ridge Dog Park - Wentzville
- St. Peters Rotary Club Dog Park
- Tails and Trails Dog Park (at Edgar M. Queeny County Park)
- University City Dog Park (near Pool at Heman Park)
- Woodson Road Dog Park
- Benton Park West Dog Park
- Canine Country Kennel Dog Park
- Happy Hounds Playground
- John and Lucille Wendling Soulard Dog Park
- Lister Dog Park
- Lucas Garden Dog Park
- Maplewood Dog Park (at Kellogg Park)
- Shaw Dog Park
- Southwest City Dog Park (at Willmore Park)
- Water Tower Dog Park (at Compton Hill Reservoir Park)
- Rotary Park



# Pricing and Cost of Living Data

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Of the 20 largest metro areas in the country, the region had the second-lowest cost of living, according to the 2016 ACCRA Cost of Living Index. Housing is particularly affordable, with the ACCRA housing index being 29.5 percent less in the region, compared to the U.S. metro average.

The following table provides data on cost of living for the St. Louis metro area in comparison to other cities. St. Louis enjoys a significantly lower cost of living compared to U.S. averages, especially for its size. In fact, 94 percent of all MSAs have a lower standard of living than St. Louis.<sup>2</sup> The cost of living in Seattle is 36 percent more expensive than St. Louis.

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2 Living Standards across U.S. Metropolitan Statistical Areas, Bi-State Development 2017 Annual Meeting, 2017



Cost of Living Comparison to Seattle

BASED ON \$100,000 INCOME

Seattle	Income	\$100,000	
	Housing Costs	\$2,069 2BR Apartment Rent   \$552,238 3BR, 2BA Median Home Price	
	Transportation Costs	\$2.40 per gallon of gas	
	Food Costs	Bread: \$4.37   Dozen Eggs: \$2.05   Gallon of Milk: \$2.25   Personal Pizza: \$12.06	
	Entertainment Costs	Movie Ticket: \$10.06   Bowling Game: \$3.88   6-Pack Beer: \$8.07	
	Healthcare Costs	Dr. Visit: \$78.55   Dentist Visit: \$93.00   Optometrist Visit: \$74.00	

St. Louis	
Income	\$63,579
Housing Costs	60% Lower
Transportation Costs	21% Lower
Food Costs	16% Lower
Entertainment Costs	32% Lower
Healthcare Costs	24% Lower

Atlanta	
Income	\$69,307
Housing Costs	51% Lower
Transportation Costs	18% Lower
Food Costs	15% Lower
Entertainment Costs	25% Lower
Healthcare Costs	15% Lower

Austin	
Income	\$69,307
Housing Costs	47% Lower
Transportation Costs	23% Lower
Food Costs	30% Lower
Entertainment Costs	29% Lower
Healthcare Costs	19% Lower

Cincinnati	
Income	\$64,074
Housing Costs	58% Lower
Transportation Costs	23% Lower
Food Costs	22% Lower
Entertainment Costs	27% Lower
Healthcare Costs	21% Lower

Chicago	
Income	\$84,158
Housing Costs	19% Lower
Transportation Costs	4% Higher
Food Costs	12% Lower
Entertainment Costs	19% Lower
Healthcare Costs	18% Lower

Dallas	
Income	\$69,661
Housing Costs	50% Lower
Transportation Costs	19% Lower
Food Costs	19% Lower
Entertainment Costs	21% Lower
Healthcare Costs	17% Lower

Denver	
Income	\$76,874
Housing Costs	27% Lower
Transportation Costs	14% Lower
Food Costs	18% Lower
Entertainment Costs	24% Lower
Healthcare Costs	16% Lower

Detroit	
Income	\$65,771
Housing Costs	51% Lower
Transportation Costs	20% Lower
Food Costs	27% Lower
Entertainment Costs	31% Lower
Healthcare Costs	25% Lower

Kansas City	
Income	\$65,276
Housing Costs	55% Lower
Transportation Costs	25% Lower
Food Costs	19% Lower
Entertainment Costs	24% Lower
Healthcare Costs	22% Lower

Madison	
Income	\$73,833
Housing Costs	38% Lower
Transportation Costs	14% Lower
Food Costs	15% Lower
Entertainment Costs	24% Lower
Healthcare Costs	4% Lower

Minneapolis	
Income	\$74,682
Housing Costs	39% Lower
Transportation Costs	17% Lower
Food Costs	15% Lower
Entertainment Costs	20% Lower
Healthcare Costs	16% Lower

Nashville	
Income	\$66,124
Housing Costs	52% Lower
Transportation Costs	26% Lower
Food Costs	23% Lower
Entertainment Costs	23% Lower
Healthcare Costs	34% Lower

New York	
Income	\$159,830
Housing Costs	159% Higher
Transportation Costs	5% Higher
Food Costs	4% Higher
Entertainment Costs	11% Higher
Healthcare Costs	9% Lower

Pittsburgh	
Income	\$66,054
Housing Costs	47% Lower
Transportation Costs	19% Lower
Food Costs	20% Lower
Entertainment Costs	35% Lower
Healthcare Costs	24% Lower

Washington DC	
Income	\$104,950
Housing Costs	31% Higher
Transportation Costs	13% Lower
Food Costs	6% Lower
Entertainment Costs	9% Lower
Healthcare Costs	21% Lower

## Taxes Burden Chart

Missourians enjoy a low state and local tax burden as compared to U.S. averages. State personal income taxes collected per capita were close to average in Missouri (28th highest).<sup>3</sup>

TAX	MISSOURI	ILLINOIS
Personal Income	\$315 plus 6% of federal adjusted gross income over \$9,000.	3.75% of Illinois taxable income (Federal taxable income with state modifications).
Property	Residential property assessed at 19% of true or fair market; commercial and industrial property assessed at 32%; personal property at 33 1/3%. Business inventories are not taxed. Tax rates are the aggregate of local taxing districts and a .03% state tax.	Real property is assessed at 33 1/3% of market value. Personal property is not taxed. Business inventories are not taxed. Tax rates are the aggregate of local taxing districts.
Sales	4.225% of purchase price of tangible personal property and enumerated services. Local sales taxes also apply and vary by jurisdiction. In lieu of a regular use tax, a 4% special use tax is imposed on motor vehicles, trailers, boats, and outboard motors.	6.25% of purchase price of tangible personal property and selected services. 1% tax on qualifying food, drugs, and medical appliances. Local sales taxes also apply and vary by jurisdiction.

## Public Safety & Relevant Crime Data

Gallup ranks St. Louis 14th safest among the largest 50 cities, with 72 percent of residents responding they feel safe walking alone at night in the area where they live. A comparison of 2015 FBI data on metropolitan areas ranks the St. Louis MSA 167th in per capita crime rate among 348 U.S. metro areas. It should be noted that the city crime statistics for St. Louis only take into account the City of St. Louis, and not the entire region, providing an inaccurate picture of the region's public safety profile when reviewed in isolation.

### Law enforcement efforts

The St. Louis Police Department has established the Community Engagement and Organizational Development Unit to encourage officers to establish relationships with the residents of their patrol area in order to improve relations with civilians. A focused deterrence program for high-risk offenders continues, and the police department has adopted a crime reduction strategy that leverages data to identify crime patterns and trends. That information is shared with district commanders through a process called CompStat, which focuses resources in places and times where crime is concentrated.

The police department has established new levels of collaboration with federal and state law enforcement partners to coordinate strategy and focus deterrence. Importantly, the department now also coordinates with many social service agencies to ensure offenders receive the wrap-around care needed to avoid future criminality.

St. Louis is a regional leader when it comes to diversity of its police officers — at all levels of command. The Police Academy and SLMPD continue to actively recruit under-represented individuals including women, racial, and ethnic minorities, and require cultural competency training for all officers.

### Community Intervention efforts

The city is focusing efforts on groups most at risk of committing violence. This includes funding a child psychiatric clinic in North St. Louis City through a \$1 million Community Development Block Grant fund. St. Louis is increasing its capacity and systems to support individuals with mental health needs. This includes Project LAUNCH — a child-focused federal grant that is building a mental health and education system in targeted communities. The City's Mental Health Board is the recent recipient of a four-year, \$3.7 million System of Care Expansion grant to expand mental health services for children, youth, and families with severe and persistent mental health issues.

3 Sources unless noted: "2016 State Tax Handbook," CCH, 2015



# Crime

## TOTAL CRIME RATE

Per 100,000 population, 2013

1	Memphis	5,183
2	San Antonio	4,875
3	Salt Lake City	4,705
4	Oklahoma City	4,459
5	Seattle	4,347
6	Birmingham	4,252
7	Miami	4,229
8	San Francisco	4,130
9	Houston	4,048
10	Orlando	3,960
11	Jacksonville	3,725
12	Kansas City	3,723
13	Atlanta	3,720
14	Las Vegas	3,695
15	Milwaukee	3,651
16	Baltimore	3,646
17	New Orleans	3,626
18	Austin	3,450
19	Cincinnati	3,433
20	Charlotte	3,385
21	Dallas	3,369
22	Virginia Beach	3,320
23	Nashville	3,314
24	Portland	3,242
25	Sacramento	3,183
26	Buffalo	3,165
27	Detroit	3,149
28	Tampa	3,129
29	Riverside	3,128
30	St. Louis	3,102
	United States	3,099
31	Denver	3,075
32	Philadelphia	2,975
33	Minneapolis	2,869
34	Providence	2,698
35	Richmond	2,640
36	San Jose	2,614
37	Los Angeles	2,561
38	San Diego	2,541
39	Raleigh	2,503
40	Washington, D.C.	2,500
41	Hartford	2,465
42	Boston	2,245
43	Pittsburgh	2,149
44	New York	2,000

## PROPERTY CRIME RATE

Per 100,000 population, 2013

1	San Antonio	4,415
2	Salt Lake City	4,348
3	Memphis	4,190
4	Seattle	4,023
5	Oklahoma City	3,956
6	Birmingham	3,723
7	Miami	3,691
8	San Francisco	3,572
9	Houston	3,489
10	Indianapolis	3,469
11	Louisville	3,430
12	Orlando	3,420
13	Atlanta	3,331
14	Kansas City	3,254
15	Jacksonville	3,229
16	Austin	3,179
17	New Orleans	3,152
18	Cincinnati	3,147
19	Milwaukee	3,064
20	Dallas	3,036
21	Las Vegas	3,017
22	Virginia Beach	3,017
23	Baltimore	3,012
24	Portland	2,991
25	Charlotte	2,981
26	Riverside	2,794
27	Sacramento	2,767
28	Denver	2,747
29	Buffalo	2,735
30	Tampa	2,732
	United States	2,731
31	Nashville	2,718
32	St. Louis	2,670
33	Minneapolis	2,595
34	Detroit	2,579
35	Philadelphia	2,478
36	Richmond	2,396
37	San Jose	2,364
38	Providence	2,360
39	Chicago	2,339
40	Raleigh	2,283
41	Los Angeles	2,207
42	Hartford	2,201
43	San Diego	2,192
44	Washington, D.C.	2,169
45	Boston	1,890
46	Pittsburgh	1,857
47	New York	1,610

## VIOLENT CRIME RATE

Per 100,000 population, 2013

1	Memphis	993
2	Las Vegas	678
3	Baltimore	633
4	Nashville	596
5	Milwaukee	587
6	Detroit	570
7	Houston	559
8	San Francisco	559
9	Orlando	540
10	Miami	539
11	Birmingham	530
12	Oklahoma City	503
13	Philadelphia	498
14	Jacksonville	496
15	New Orleans	474
16	Kansas City	469
17	San Antonio	460
18	St. Louis	432
19	Buffalo	430
20	Sacramento	416
21	Charlotte	404
22	Tampa	397
23	Phoenix	392
24	New York	390
25	Atlanta	389
	United States	368
26	Salt Lake City	357
27	Boston	355
28	Los Angeles	353
29	San Diego	349
30	Providence	338
31	Riverside	333
32	Dallas	333
33	Washington, D.C.	331
34	Denver	329
35	Seattle	324
36	Virginia Beach	304
37	Pittsburgh	293
38	Cincinnati	285
39	Minneapolis	274
40	Austin	271
41	Hartford	264
42	Portland	251
43	San Jose	250
44	Richmond	244
45	Raleigh	219

## MURDER RATE

Per 100,000 population, 2013

1	New Orleans	19.0
2	Memphis	10.3
3	Baltimore	10.0
4	Detroit	9.6
5	Birmingham	8.2
6	Indianapolis	7.6
7	Kansas City	7.4
8	St. Louis	7.2
9	Jacksonville	7.1
10	Philadelphia	7.1
11	Milwaukee	7.0
12	Virginia Beach	6.9
13	Miami	6.6
14	Chicago	6.4
15	Richmond	6.2
16	Houston	5.9
17	Oklahoma City	5.9
18	Atlanta	5.9
19	Las Vegas	5.7
20	Charlotte	5.2
21	Buffalo	5.2
22	Riverside	5.0
23	Louisville	4.9
24	Phoenix	4.8
25	Cincinnati	4.8
26	San Francisco	4.8
27	San Antonio	4.6
28	Los Angeles	4.5
	United States	4.5
29	Dallas	4.4
30	Tampa	4.3
31	Sacramento	4.1
32	Pittsburgh	4.1
33	Orlando	3.9
34	Washington, D.C.	3.7
35	Denver	3.7
36	New York	3.5
37	Hartford	3.4
38	Nashville	3.4
39	San Jose	3.0
40	Austin	2.8
41	Raleigh	2.7
42	Minneapolis	2.5
43	Providence	2.5
44	San Diego	2.2
45	Seattle	2.2
46	Boston	1.8
47	Salt Lake City	1.8
48	Portland	1.4

## TOTAL CRIME RATE

Percent change, 2012-2013

1	Baltimore	1.1
2	Salt Lake City	1.1
3	Las Vegas	0.9
4	Denver	-0.3
5	San Diego	-1.2
6	Orlando	-1.8
7	Atlanta	-1.9
8	Virginia Beach	-2.4
9	Birmingham	-2.5
10	New Orleans	-2.9
11	San Antonio	-4.0
12	Boston	-4.0
13	Dallas	-4.3
14	Washington, D.C.	-4.4
15	Tampa	-4.4
16	Memphis	-4.4
17	Detroit	-4.7
18	Cincinnati	-4.7
19	Los Angeles	-4.8
	United States	-4.8
20	Providence	-4.8
21	Sacramento	-5.5
22	Portland	-5.5
23	Miami	-5.9
24	Richmond	-6.0
25	Buffalo	-6.0
26	Kansas City	-6.1
27	Jacksonville	-6.2
28	Milwaukee	-6.8
29	St. Louis	-7.3
30	Austin	-7.4
31	Nashville	-7.7
32	Riverside	-7.7
33	Raleigh	-7.9
34	San Jose	-9.2
35	Oklahoma City	-9.3
36	Hartford	-9.9

Source: FBI, Uniform Crime Reports

# Diversity of Housing Options

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Housing options in the St. Louis region are incredibly eclectic — new homes, elegant Victorian homes, turn-of-the-century brick walkups, mansions, century farm houses, downtown lofts and everything in between — o within reach to all. The region has a rich variety of architecturally distinct neighborhoods with a connectedness that is rare in large metro areas. Urban, suburban, small town, and rural lifestyle options are available in the bi-state region, with multiple options for singles and families.

Bloomberg ranked St. Louis the most affordable of “Six Cities Where Millennials Can Afford to Pay Rent,” making St. Louis very attractive to millennials and to graduates from area colleges and universities. The housing stock is appealing to multiple generations because St. Louis’ median home value is nearly 20 percent below the U.S. median, but second to none in terms of quality and climate. The cost of housing in Seattle is 60 percent higher than in St. Louis, according to Nerdwallet.com.

The Council for Community and Economic (formerly ACCRA) Cost of Living Index, which measures the relative cost of U.S. Metropolitan areas, examined the cost of a new 2,400-square-foot, four-bedroom, two-bath home with an attached two-car garage. This index correlated with an average St. Louis area home price of \$214,260 for 2016, well below the U.S. metro average of \$323,999. Seattle’s new home prices average \$563,000; more than 2.6 times as much as the same new two-story house in St. Louis.

In another study, analysts compared the monthly rental price for a relatively new, 950-square-foot apartment with two bedrooms and 1½-2 bathrooms. Monthly rent for such an apartment averaged \$864 in the St. Louis area in 2016, as compared with the U.S average of \$1,008. Seattle’s apartment prices average \$1,927 — 2.2 times more expensive than the same size and type in St. Louis.

## Potential Housing Options Available Near River Campus

St. Louis is proposing a riverfront site of more than 200 acres — with potential growth for more — in its downtown urban core, including over 100 acres in Illinois and 100 acres in Missouri, connected by light rail and a full-service transit bridge. The site has massive visibility from the Mississippi River, and the potential for catalytic development of commercial and residential growth. The location is centrally connected to all four modes of transportation, and numerous entertainment and dining options. Diverse housing options are available in the downtown and surrounding neighborhoods in both Missouri and Illinois.

This is a summary of relevant development activity in the vicinity of the proposed River Campus. (See the addenda at the end of this section for a more complete list of St. Louis housing options. Prices, photos, and comparisons of Illinois and Missouri housing stock to Seattle neighborhoods appear there.)

### Downtown Housing Market:

- **Number of residents in urban core:** 9,500
- **Number of residents in greater downtown area:** 18,815
- **Existing Housing Units:** 6,600
- **Average Home Price:** \$118,600
- **Occupancy:** 95.4 %
- **Projected new units in net 3-5 years:** 1,500
- **Rent Range:** \$650 (studio)–\$5,000 (3BR)
- **Location:** Most of the housing is within Chestnut, Jefferson, Delmar, and 4th
- **Transportation:** Downtown is served by five MetroLink stops, multiple bus routes, and four interstate highways

### North St. Louis Housing Near River Campus

Important federal initiatives also are committed to North St. Louis, near Downtown. In January 2015, Urban Strategies, a local nonprofit in partnership with the City of St. Louis, received a \$500,000 Choice Neighborhood Planning Grant to plan the revitalization of Preservation Square housing near the North Riverfront area. A plan is now underway to create opportunities for residents to access better housing, education, health and economic development.



The area also received an Implementation Grant to make the plan a reality with a \$30 million federal investment. In addition, St. Louis was named one of 22 federal “Promise Zones” to create an opportunity to address poverty for the next 10 years, with technical assistance, federal staff support, and preferential access to federal funding.

## Downtown Projects

With more than \$5 billion being spent on development projects in the last decade, downtown blurs the line between work and play, thanks to the location of major corporations, small businesses, residential lofts, boutiques, galleries, restaurants, and nightspots.

The downtown area posted another strong year of growth in 2016. The population increased by 7.2 percent, with more than 600 new residents moving into the downtown area. Newly renovated buildings added new housing stock and a range of unit types. Demand for these was also higher, resulting in an occupancy rate of 95.4 percent.

The population influx into St. Louis’ urban core includes Grand Center Arts District and Midtown’s Cortex Innovation District, where

multiple new buildings are under construction, including more than \$1.5 billion in new clinical and research facilities, and another \$500 million in the development of residential and retail projects. A new MetroLink light rail commuter station will open in the Cortex area, further connecting Midtown to Downtown.

Because occupancy rates in the urban core are strong, multiple residential and mixed-use projects were announced in the past 12 months. Nearly 1,500 units are expected to be available in the next few years. Of those, 1,250 units are estimated to be added by just four large redevelopment projects. Large public projects such as CityArchRiver, the Kiener Plaza redevelopment next to the Old Courthouse, and Soldiers Memorial renovation, are expected to further boost demand for downtown living. Developers continue to develop more properties as demand increases.

With the redevelopment of three marquis projects, Downtown West has more than \$210 million in current and planned construction projects. This includes more than 450 new residential units and nearly 200 new hotel rooms. In addition, the regeneration occurring along Washington Avenue is making the city a prime location for multiple generations to live.



## St. Louis neighborhoods & similar Seattle neighborhoods of note

SEATTLE	ST. LOUIS
West Seattle	Alton, IL
Lynnwood, Renton	Ballwin, Ellisville
Auburn	Belleville, Edwardsville, IL
South Park, Beacon Hill, Columbia City	Benton Park
Magnolia, Columbia City, Lower & Upper Queen Anne, Madison Park, Wallingford	Central West End
Ballard	Cherokee Street West
Auburn, Renton, Shoreline, Redmond	Chesterfield
Queenland, Mercer Island, Medina, Bellevue	Clayton
Bothell, Kirkland	Creve Coeur, Olivette
Woodinville	Defiance, Hermann, Cottleville, St. Genevieve
South Lake Union [Amazon Headquarters]	Downtown West, Cortex District, Midtown
Capitol Hill, Pioneer Square, Sodo, George Town	Downtown, Laclede's Landing, Washington Avenue
Belltown, George Town	Grand Center, Midtown
Bellevue, Edmunds	Kirkwood, Des Peres
Mercer Island, Medina, Lake Washington	Ladue, Frontenac, Huntleigh, Town & Country, St. Albans
Bellevue, Columbia City, Lower Queen Anne, Magnolia, Redmond, West Seattle	Lafayette Square
Magnolia	Lindenwood Park, St. Louis Hills
Ballard, Fremont, Columbia City	Maplewood
Federal Way	Maryland Heights
Seward Park, Tacoma	North St. Louis County, The Ville
Redmond, Renton, Auburn	O'Fallon
Pioneer Square	South Broadway, Lemp, Dutchtown, Cherokee West, Carondelet, South City
International District, Belltown, Rainier Valley	South Grand, Tower Grove South
Soquemie, Issaquah	St. Charles, St. Peters
Belltown, Ballard, Capitol Hill, George Town	The Grove, Midtown
International District	The Hill
Wallingford	The Loop
Bonney Lake, Magnolia	Webster Groves
Bellingham	Weldon Springs, Earth City
Yelm	Wildwood

This table is a list of distinct neighborhoods available throughout the St. Louis region, as well as comparable neighborhoods in Seattle. The list uses downtown as the epicenter.

### Downtown St. Louis

The downtown area has experienced an influx of young creative professionals due to the region's density of college graduates and great quality of life amenities. In fact, St. Louis was ranked 14th in the "Top U.S. Metro Areas for College Students" by the American Institute for Economic Research in 2015. With more than \$5 billion being spent on development projects in the last decade, downtown blurs the line between work and play, thanks to the co-location of major corporations, small businesses, residential lofts, boutiques, galleries, restaurants, and nightspots. Ballpark Village, CityArchRiver, and the National Blues Museum are the most recent additions.

- **Population:** 18,815
- **Average Home Price:** \$118,600
- Washington Avenue nightlife
- Ballpark Village
- Four Seasons hotel
- City Museum
- Busch Stadium
- Scottrade Center

*Similar neighborhoods of note:*  
*South Lake Union*

### Lafayette Square

This historic enclave centers around its collection of "painted ladies," a set of stately Victorian homes that surround beautiful Lafayette Park. The 30-acre oasis of greenery within the urban landscape serves as an idyllic setting for residents and visitors to gather round the bandstand for free summertime concerts, and a place where dog-walkers greet one another's charges by name. Along the perimeter, renovated lofts and condos are sprinkled in amongst the one-of-a-kind restaurants, bars, specialty shops, and bed-and-breakfasts.

- **Population:** 9,340
- **Average Home Price:** \$243,200

*Similar neighborhoods of note:*  
*Bellevue, Columbia City, Lower Queen Anne, Magnolia, Redmond, West Seattle*

## Soulard

The city's oldest neighborhood, its historic streets are lined with red brick townhomes that house live music clubs and eclectic restaurants. Located just five minutes south of the Arch, the lively neighborhood was named for Antoine Soulard, a Frenchman who surveyed colonial St. Louis for the King of Spain. Today, structures built by early brewery workers, including the Lemp Mansion, have become restaurants, many of them with elaborate courtyards. The neighborhood celebrates its French heritage with one of the largest Mardi Gras fetes in the country. Revelers also flock to the neighborhood for Oktoberfest and St. Patrick's Day. Soulard Farmers Market, operating since 1779, is the neighborhood's centerpiece.

- **Population:** 3,440
- **Average Home Price:** \$232,100

*Similar neighborhoods of note:*  
*Pioneer Square*



## Cherokee Street

Pop-up beach bars and dumpster pool parties belie the undercurrent of vibrant energy that is Cherokee Street. Far from the ubiquitous confines of a suburban refuge, Cherokee street — a seven-mile drive from downtown St. Louis — reflects the infusion of family-owned businesses and creative people who fully embrace the beatnik vibe that emanates. In fact, they've created it. Cherokee Street has the largest concentration of Latino owned and operated bakeries, restaurants, shops and groceries in St. Louis — all located within steps of one another.

- **Population:** 4,404
- **Average Home Price:** \$92,000

*Similar neighborhoods of note:*  
*Ballard*

## Central West End

Located just west of downtown, the pedestrian-friendly Central West End is nestled between Forest Park and the Saint Louis University campus. Nearby are the Washington University School of Medicine, the BJC Healthcare campus, the St. Louis College of Pharmacy, and the Cortex Innovation Community, a national leader in tech startups. The CWE business district stretches just under a mile on Euclid and provides the perfect setup for walking its entire length. The district is home to more than 75 restaurants, bars, businesses, five art galleries, and stunning historic homes that date back to the 1904 World's Fair in Forest Park. The area was named one of America's Top 10 Great Neighborhoods by the American Planning Association in 2014.

- **Population:** 15,565
- **Average Home Price:** \$326,250

*Similar neighborhoods of note:*  
*Magnolia, Columbia City, Lower & Upper Queen Anne, Madison Park, Wallingford*

## Tower Grove East

This mixed neighborhood allows for many housing opportunities and renovations. Many of the city's towering estates are tucked into this quiet, tight-knit community. Owning a piece of history is a reality here, as many homes were built in the 19th century. Coffee shops, hole-in-the wall bars, and many other businesses remain tucked away amongst residential blocks, providing a very close community vibe.

- **Population:** 6,682
- **Average Home Price:** \$134,820

*Similar neighborhoods of note:*

*International District, Belltown, Rainier Valley*

## Tower Grove South

Plenty of St. Louis' favorite international foods and grocery options, bars, and businesses are located here. Tower Grove Park is also where you'll go for team sports like softball and ultimate Frisbee. A great place for families and young professionals. The American Planning Association designated South Grand Boulevard as one of five "great streets" and 15 "great places" in America 2017.

- **Population:** 12,918
- **Average Home Price:** \$132,275

*Similar neighborhoods of note:*

*International District, Belltown, Rainier Valley*

## Midtown St. Louis (Grand Center) / Downtown West

This ever-growing community sits in the center of St. Louis University, allowing for great access to diverse food, shops, and entertainment. Here, the old Moolah Shrine houses a couch-centric movie theater, and a popular nightclub disguises itself as "The Library." Much of the development in this area is also highly influenced by the large tech companies and medical facilities moving in, creating demand for expansive lofts and townhomes. Centrally located, this area has great access to downtown and major highways.

- **Population:** 5,652
- **Average Home Price:** \$157,500

*Similar neighborhoods of note:*

*South Lake Union, Belltown, George Town*



## The Grove

The Grove is a relatively young neighborhood with many LGBT-friendly bars and restaurants. The area hosts many festivals throughout the year, and is also home to the expansive Urban Chestnut Brewing Company.

- **Population:** 2,918
- **Average Home Price:** \$156,000

*Similar neighborhoods of note:*

*Belltown, Ballard, Capitol Hill, George Town*

## Carondelet

Founded 250 years ago on the bluffs of the Mississippi River, and just a five-minute drive from downtown on the south side, residents can experience the offbeat – everything from the annual Garlic Festival and Tomato Festival, to the River Des Peres Yacht Club Deli and the Kitchen Incubator and Carondelet Bakery for baking entrepreneurs. Concerts on the bluffs are held throughout the summer. In a tribute to its French heritage, the city also hosts the annual Bastille Day Pub Crawl.

- **Population:** 8,661
- **Average Home Price:** N/A

*Similar neighborhoods of note:*

*Pioneer Square*



## The Ville

During the 1920s, The Ville was home to an elite community that included black professionals, businessmen, entertainers, and Annie Malone, one of the country's first African-American millionaires. One of St. Louis' most historically significant neighborhoods, The Ville was home to Sumner High School, the first school west of the Mississippi River to provide secondary education for African-Americans. Some of the school's best known alumni are Rock 'n' Roll Hall of Famer Chuck Berry, opera diva Grace Bumbry, and tennis great Arthur Ashe. During the 1920s and '30s, the neighborhood thrived, as more and more African-American institutions were established, including Harriet Beecher Stowe College and Homer G. Phillips Hospital. Today, the soaring Ville Monument pays tribute to the neighborhood's achievements and its famous sons and daughters.

- **Population:** 2,325
- **Average Home Price:** \$60,200

*Similar neighborhoods of note:*  
*Seward Park, Tacoma*

## The Hill

The Hill's roots are interspersed with the history of St. Louis, generating two of the region's proudest exports — world-class athletes and Italian cuisine. Baseball's Yogi Berra and Joe Garagiola grew up here, and today the neighborhood maintains a traditional collection of authentic Italian bakeries, grocery stores, restaurants, and mom-and-pop trattorias. Everything is colorful on The Hill — even the fire hydrants are painted red, white, and green. Twenty-first century additions include coffee houses, studios, retail, and small businesses that create additional energy in the cozy enclave. Its epicenter is an intersection that sums it up perfectly: St. Ambrose Catholic Church on one corner, an Italian bakery/restaurant on another, an import shop across the street, and a neighborhood tavern/bocce garden on the fourth corner.

- **Population:** 2,443
- **Average Home Price:** \$133,983

*Similar neighborhoods of note:*  
*International District*

## Delmar Loop

Its proximity to Washington University contributes a fresh, contemporary vibe on its main conduit — Delmar Boulevard, a hip main drag lined with numerous international and American restaurants, a concert hall, coffee shops and vintage clothing outlets. Fine and funky is the motif. Nicknamed "The Loop" after an old streetcar turnaround, the neighborhood is on the cusp of introducing a 2.2-mile fixed route electric trolley that will originate in the entertainment district and take riders to the St. Louis History Museum in Forest Park.

- **Population:** 35,371
- **Average Home Price:** \$176,000

*Similar neighborhoods of note:*  
*Wallingford*



## Clayton

Sophisticated Clayton is home to St. Louis County government and a collection of boutiques, galleries, hotels, and restaurants known throughout the region. You'll find places to eat, drink, shop and stay at every corner in the bustling district. The Saint Louis Art Fair, rated as one of the top art fairs in the nation, attracts more than 150,000 people to Clayton's streets each September. Other special events include the Taste of Clayton food festival, Gallery Night receptions in the area's art galleries, a seasonal farmers market, and Parties in the Park cocktail gatherings each spring and summer.

- **Population:** 15,884
- **Average home Price:** \$600,912

*Similar neighborhoods of note:*  
*Queenland, Mercer Island, Medina, Bellevue*



## Webster Groves

Webster Groves, a leafy enclave filled with century-old homes and a mix of architectural styles, might be described as “sleepy” if it weren’t for its continual calendar of cultural offerings, cozy restaurants, and boutiques offering atypical fashions and accessories. More than 300 of the community’s homes are listed on the National Register of Historic Places. Webster is the world headquarters for Webster University and the Loretto-Hilton Theatre — where productions by the acclaimed Repertory Theatre of St. Louis and the internationally known Opera Theatre of Saint Louis are staged each year. Webster Groves’ tree-lined streets and abundance of single-family homes have continued to attract people to the area as a great place to live. The geographic and economic diversity of Webster Groves is evident in its variety of neighborhoods. The Kirkwood High School Pioneers and Webster Groves Statesmen have the longest-running high school football Thanksgiving Day rivalry west of the Mississippi (110 years) and alternate as hosts of the annual game.

- **Population:** 23,084
- **Average Home Price:** \$241,100

*Similar neighborhoods of note:*  
*Bonney Lake, Magnolia*

## Maplewood

This charming neighborhood on the outskirts of the city has emerged as one of St. Louis’ newest destinations for boutique shopping, one-of-a-kind eateries, unique entertainment venues,

and festive special events. Maplewood also offers the vintage Saratoga Lanes — the oldest bowling alley west of the Mississippi River — tours of the local brewpub Schlafly Bottleworks that explain the history of beer in St. Louis, and the must-see Route 66 sidewalk plaques. Maplewood was recently named the first-ever Green Dining District, with its restaurants committed to sustainable green business practices. Annual events include a Sweet Tooth Tour, the Coffee Crawl, and the Let Them Eat Art event every summer.

- **Population:** 7,945
- **Average Home Price:** \$199,597

*Similar neighborhoods of note:*  
*Ballard, Fremont, Columbia City*

## Kirkwood

Bowing to its one-time moniker as the “queen of the suburbs,” Kirkwood continues to exude a royal attitude that’s evolved into good old-fashioned, small-town charm. Families flock here to take advantage of schools, an abundance of churches, and a neighborly existence, while visitors and residents take advantage of the assorted shopping, dining, and family-friendly entertainment options. Kirkwood is home to the Magic House, St. Louis Children’s Museum, and the Stages St. Louis theatre company, which performs May through October.

- **Population:** 27,750
- **Average Home Price:** \$358,393

*Similar neighborhoods of note:*  
*Bellevue, Edmunds*

## North St. Louis County

With 22 communities in North St. Louis County, there are attractions to match every interest. Historic homes, ranging from simple log cabins to elaborate mansions from St. Louis’ earliest days, are open to the public. Space fans can visit the James S. McDonnell Prologue Room at Boeing to learn about the famous aerospace company or reserve a seat on a public “mission” to the moon or Mars at the Challenger Learning Center. Hikers and bikers take to the trails at the Edward “Ted” and Pat Jones Confluence Point State Park or the Columbia Bottom Conservation Area at the confluence of the Mississippi and Missouri rivers. The Old Chain of Rocks Bridge is where pedestrians and cyclists can travel the trail of Old Route 66 across the Mississippi.

*Similar neighborhoods of note:*  
*Seward Park, Tacoma*



## Maryland Heights / Westport

While only a few generations ago this was all farmland, the development of Westport Plaza and influx of corporate headquarters has made this area a bustling community. Architecture ranges from larger apartment complexes, to new builds, to small single-family homes that remain affordable for the growing area.

- **Population:** 27,472
- **Average Home Price:** \$152,300

*Similar neighborhoods of note:*  
*Federal Way*

## Chesterfield

Chesterfield is a premier residential, business, retail, and transportation center. It also tends to be a relocation hub for athletes when they move here. Overall, Chesterfield is a peaceful enclave with a variety of public parks, pathways, and stables, and is home to Faust Park, which boasts a historic village, playground, walking trails, a carousel, and The Butterfly House. The architecture primarily consists of new build homes and larger estates.

- **Population:** 47,864
- **Average Home Price:** \$360,600

*Similar neighborhoods of note:*  
*Auburn, Renton, Shoreline, Redmond*

## Cottleville

As one of the oldest cities in St. Charles County, Cottleville has been working to preserve and enhance its historic downtown district, which is home to shops, businesses, restaurants, pubs, and 125 acres of parks.

- **Population:** 3,877
- **Average Home Price:** \$320,900

*Similar neighborhoods of note:*  
*Woodinville*

## Dardenne Prairie

Newer, planned community in St. Charles County, centered around Mastercard Global Technology and Operations Center.

- **Population:** 13,329
- **Average Home Price:** \$308,800

*Similar neighborhoods of note:*  
*Woodinville*

## Ferguson

This small, diverse neighborhood plays host to many successful businesses, coveted historic architecture, and is conveniently located near numerous corporate headquarters. Downtown Ferguson has strong historical roots and has remained small and tight-knit with great support within the community.

- **Population:** 21,086
- **Average Home Price:** \$64,948

## Florissant

One of the oldest settlements in St. Louis, this upwardly mobile community remains a great place to raise a family in St. Louis. There are lots of diners, dives, and local shops that still reflect the area's old charm.

- **Population:** 52,268
- **Average Home Price:** \$80,245

## St. Ann

Located close to the airport, St. Ann is a community of nearly 14,000 residents located in northwest St. Louis County, near St. Louis Lambert International Airport. The city has one of the most expansive parks systems in the area. This small community, while mostly residential, has many businesses that have been pillars of the community for years.

- **Population:** 14,000
- **Average Home Price:** \$93,100



## St. Charles

St. Charles is a sprawling town west of St. Louis on the Missouri River, boasting tons of history, antiques, and great dining options. Downtown along the river is a great spot to walk, bike, or even enjoy a carriage ride. Many planned communities have popped up in St. Charles, creating plenty of opportunities for families looking to buy new or build. Being a bit farther away from the city, the area maintains a quieter, riverside-town feel. Southern Magazine touts New Town St. Charles as one of the most successful large-scale New Urbanist-communities built on the edge of suburbia. The unexpected design of the neighborhood ties together the squares, shops, and homes to the lakes and canals.

- **Population:** 385,590
- **Average Home Price:** \$180,110

*Similar neighborhoods of note:*  
Woodinville



## Augusta

A quaint village 35 miles west of St. Louis, is home to bed and breakfasts, boutique shops, and the many wineries that make Missouri an excellent destination for wine lovers — especially port. Visitors can enjoy a picnic lunch, live music and great views at the many wineries in the region. Notably, Augusta was the first federally designated viticulture (wine) area in the United States — even before Sonoma Valley.

*Similar neighborhoods of note:*  
Bellevue, Bellingham, Issaquah, Shoreline, Tacoma, Woodinville

## O'Fallon, MO / WingHaven

Family-oriented and friendly planned community woven within several corporate headquarters and campuses. The city was ranked 7th on the national 2016 Best Cities for Young Families list.

- **Population:** 84,009
- **Average Home Price:** \$232,200

*Similar neighborhoods of note:*  
Woodinville

## St. Peters

As a subset of St. Charles County, St. Peters offers many newer suburban homes, as well as more rural homes with land opportunity. This tight-knit community provides many great parks and outdoor activities for families. Shopping centers and numerous chain and local restaurants are scattered throughout this expansive town.

- **Population:** 56,076
- **Average Home Price:** \$189,700

*Similar neighborhoods of note:*  
Woodinville

## Weldon Spring

This suburb is home to many great golf courses, the August A. Busch Memorial Conservation Area, and upscale subdivisions. The community took its name from a spring of the same name near the original town site. A post office called Weldon Spring was in operation from 1875-1957.

- **Population:** 5,496
- **Average Home Price:** \$314,100

*Similar neighborhoods of note:*  
Woodinville

## Wentzville

This vast neighborhood has a very small town country feel with a suburban flair. Many new developments and homes have popped up over the years, creating a multitude of new communities and neighborhood pockets. With a large range of housing prices and styles, Wentzville has a lot to offer families looking to live outside the city.

- **Population:** 39,591
- **Average Home Price:** \$227,081

## Illinois Neighborhoods

### Alton

Alton's location along the Mississippi River boasts beautiful views, excellent hiking and biking opportunities, idyllic riverside eateries, and a rich history. This charming town makes for a great weekend getaway or a quaint place to live.

- **Population:** 27,003
- **Average Home Price:** \$115,459

*Similar neighborhoods of note:*  
*West Seattle*

### Belleville

Belleville, which means "beautiful city" in French, is a tight-knit community in St. Clair County. The city is the seat of the Roman Catholic Diocese of Belleville and the National Shrine of Our Lady of the Snows. It is the most populated city in the Metro-East region of the St. Louis metro area. Due to its proximity to Scott Air Force Base, the population receives a boost from military and federal civilian personnel, defense contractors and military retirees. Belleville hosts Art in the Square each year, which draws thousands of art enthusiasts, and has been ranked No. 1 and No. 2 in the nation for the past nine years by Greg Lawler's Art Fair Source Book. Beast Craft BBQ, Eckert's Country Store and Farms, and The Weingarten are all popular places to check out in the greater area.

- **Population:** 42,034
- **Average Home Price:** \$114,006

*Similar neighborhoods of note:*  
*Auburn*

### Collinsville

This booming small town offers a combination of community and culture. Close to Southern Illinois University Edwardsville, the area has a rich DIY music scene that appeals to young artists. A mix of small country homes and new homes offer architectural variety in this suburban town. Collinsville is home of the Brooks Catsup Bottle Water Tower (the world's largest ketchup bottle) and is the world's horseradish capital. It is home to the Fairmount Park Racetrack and Cahokia Mounds, the largest pre-Columbian settlement north of Mexico.

- **Population:** 24,754
- **Average Home Price:** \$142,440

*Similar neighborhoods of note:*  
*Auburn, Olympia, Washington*



### Edwardsville

This diverse college town is known for its friendly neighbors and slightly secluded location. An adorable downtown and diverse housing options make it one of the most coveted communities in the Metro East. It's the third-oldest city in Illinois and is host to numerous trails and parks for nature lovers. A 2010 issue of Family Circle named Edwardsville third of their top 10 Best Towns for Families.

- **Population:** 24,992
- **Average Home Price:** \$230,645

*Similar neighborhoods of note:*  
*Auburn, Olympia, Washington*

### O'Fallon

Along I-64, near Scott Air Force Base, is the fastest-growing community in the Metro East. O'Fallon is affordable, quiet, and scenic. While there are many locals, the constant development of the base has brought lots of economic and real estate growth. O'Fallon is the major retail center in the Metro East.

- **Population:** 29,002
- **Average Home Price:** \$209,432

# TESTIMONIALS

*from Corporate Leaders in St. Louis*

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*“Enterprise Holdings operates three brands; our business was started by my father 60 years ago, here in St. Louis, with \$25,000 of borrowed money with one employee and several vehicles. Today, we are in 90 countries; we are a \$22 billion revenue business with 100,000 employees. Our headquarters is here in St. Louis and we couldn’t be more pleased to be here for a whole lot of reasons, including the region’s work ethic, our city of neighborhoods, and the livability — St. Louis is a terrific place to live and my employees believe that too. St. Louis is a great walkable and bikeable city, but I can’t emphasize enough how much better the cost of living is here than anywhere else. It’s a much lower cost to do business in St. Louis.”*

– Andy Taylor  
Executive Chairman  
Enterprise Holdings Inc.  
100,000 employees





*“One of the reasons we decided that St. Louis was a perfect place for our headquarters is its location in the Midwest. The resources in the Midwest are extraordinary, to say the least. The foundational pieces, which I think are just vital, include core values, a strong work ethic, loyalty, trustworthiness, and integrity. The core values of the workforce align with what World Wide is today, and are what make St. Louis so powerful as a community. In addition to that, I think the educational system that we have here, whether public or private, is second to none. What I would say to someone that is considering St. Louis as a place to do business, or to move their headquarters, is to look at the educational system. Look at the set of core values. If they align with their needs, they are going to be impressed by St. Louis.”*

– David Steward

Chairman and Founder  
World Wide Technology  
5,000 employees



*“When I moved to St. Louis from San Diego to join BJC in 2009, we were 12 hospitals with 23,000 employees. Today we’re 15 hospitals with 31,000 employees. We’ve always had the local political support of our elected officials, as well as our local communities, because we serve and employ so many people throughout the region and state. BJC is the largest employer in St. Louis, so we’ve been welcomed and provided the support to build and expand our campus because ultimately, at the end of the day, we improve the health of our communities, physically and fiscally, so we’re embraced and we’re welcomed.”*

– Richard Liekweg

President and CEO-Elect  
BJC Healthcare  
31,000 employees



*“I’ve co-founded half a dozen companies, and I started most of my companies in St. Louis. Square started in San Francisco, but then opened an office in St. Louis, which is now our fastest-growing office worldwide. Square’s St. Louis office opened here about three years ago, and the talent pool is just amazing in St. Louis. As a result, we’ve doubled down on my hometown.”*

– Jim McKelvey

Co-Founder of Square  
Co-Founder of LaunchCode



*“I’m a proud St. Louisan. I was born and raised here. I went to high school, college, and started my career here. I had opportunities to go elsewhere, but I chose to stay here because St. Louis has so much to offer, and it’s given me more opportunities than I could ever have imagined.*

*Ameren has been a part of St. Louis for over 100 years. We’re the largest energy provider in the region; we serve over two and a half million electric customers, and nearly one million natural gas customers. When Amazon comes to St. Louis, they’re going to have a utility partner, an energy provider, that’s going to put them number one, and we’re going to find sustainable energy solutions for them, which I know is so important to their team. In fact, we just announced that we have made a commitment to reduce our carbon emissions by 80% below 2005 levels by 2050. We know that’s important to our customers, our environment, and to our country.*

*As Amazon evaluates the proposals for its HQ2, I want them to know that St. Louis has played a huge role in the success of Ameren because of the talent. No organization is going to be successful without talent, and St. Louis provides incredible talent from the universities, the technical training schools, and, frankly, from the business community. People that come to St. Louis stay here. So we have this incredible ecosystem of talent that comes not just from the university system, but also from our innovative startup ecosystem. We’re able to grab that talent, which makes a huge difference for us.”*

– Warner Baxter

Chairman, President and CEO  
Ameren Corporation  
8,600 employees



A man with short brown hair, wearing a green sweater and a brown leather strap, is seen from behind, looking out over a large industrial shipping yard. The yard is filled with stacks of colorful shipping containers (red, blue, white, and orange) and several large blue gantry cranes. The scene is set under a bright, slightly cloudy sky. The man is standing on a raised platform or walkway, looking down the length of the container stacks.

**DAY ONE  
STARTS HERE**



# DAY ONE STARTS HERE

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*“Tallyfy won both 500 Startups and Alchemist Accelerator in the Bay Area, but we’re in St. Louis because of the untapped, loyal tech talent for a startup like ours. The cost of talent in the Bay area is many times greater. Our entire product runs on AWS services. We can’t scale without it. We’re also building integrations into Amazon products like WorkDocs and WorkMail. If Amazon came here, many startups like ours would be able to partner more deeply with Amazon – enabling a win-win for St. Louis-based entrepreneurs and Amazon. St. Louis is serious about tech – consider these three points:*

- 1. We came from London to be in St. Louis. Then, we left temporarily for Silicon Valley but came right back to St. Louis because of the community and cost of living. There was even a story about it in the WSJ.*
- 2. St. Louis provided us with a \$50K Arch Grant (equity-free), relocation assistance, and some of the strongest connections and networking opportunities anywhere.*
- 3. The Missouri Technology Corporation has invested \$530K into Tallyfy. St. Louis and Missouri are proving to be a hotbed of innovation.”*

– Pravina Pindoria and Amit Kothari  
Co-founders of Tallyfy



## Why is St. Louis the right location for Amazon's HQ2 now and into the future?

The St. Louis region has the blueprint to meet Amazon's needs now and later. We know this because there are certain unchanging aspects of St. Louis that Amazon will always need — namely, our work ethic and our research.

This RFP has probably earned more attention than any RFP ever issued — for good reason. It is about more than jobs and construction. It's about finding the right fit for what Amazon has ambition to do now and, most importantly, into the future.

St. Louis is an emerging market. As a result, St. Louis has tremendous untapped potential that is available to benefit Amazon. For all these reasons, St. Louis is prepared to provide Amazon with what it needs — and more — to build a successful HQ2 on Day One.



# Thinking Big

## and Being Inventive is Here

Several of St. Louis' industry clusters of strength tie in with Amazon Web Services (AWS) industry sectors: healthcare, biosciences, financial services, energy, logistics, and agriculture. Amazon could be the fuel that turbocharges time-to-market for innovations in Alzheimer's research, genomics, immunizations, and global food.

Additionally, production of the new \$1.75 billion National Geospatial-Intelligence Agency (NGA) Western headquarters in North St. Louis, would serve as an ideal case study for AWS Government solutions, and an opportunity to increase Amazon's influence in government modernization initiatives.

Amazon's collaborations could start with any or all of St. Louis' three Innovation Districts — CORTEX, T-REX, and 39N — where the "anchor plus" model creates a rich base of relevant firms and an inventive environment that attracts dynamic talent from local universities as well as from around the world.



The following St. Louis-based accelerators, innovation centers, and incubators offer Amazon space to collaborate with tech professionals and cultivate recurring talent.

- **Center for Emerging Technologies:** IT, bio-science, consumer goods, & manufacturing
- **Donald Danforth Plant Science Center:** plant sciences
- **Helix Center:** plant sciences
- **MEDLaunch:** biomedical
- **SixThirty FinTech:** financial services
- **SixThirty CYBER:** cybersecurity
- **Capital Innovators:** corporate innovation, energy, & education
- **Ameren Energy Accelerator:** sustainable energy
- **Stadia Ventures:** sports business
- **BioGenerator:** biomedical & AgTech
- **Yield Lab:** AgTech
- **OPO Startups:** Old Post Office in St. Charles: co-working
- **Tech Artista:** co-working
- **Nebula:** co-working
- **DK Annex:** co-working
- **Industrious:** co-working
- **RISE:** co-working
- **Covo:** co-working
- **CIC:** co-working
- **CIC@CET:** co-working
- **Claim Academy:** co-working
- **St. Louis Venture Works:** incubator
- **Small Business Incubator Program at Southern Illinois University – Carbondale:** housed within the Dunn-Richmond Economic Development Center in the SIU Research Park, adjacent to the main campus at SIUC.



# Being Innovative in Healthcare is Here

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St. Louis hosts premier research universities, medical centers, and life sciences companies. As a result, scientists in St. Louis are constructing blueprints for healthcare advancements with the potential for global impact. Amazon's culture of curiosity, big thinking, and relentlessly high standards would fast-track discoveries and innovations in St. Louis, which could save countless lives and improve the health of millions of people now, and for generations to come.

Amazon would benefit from having a headquarters in St. Louis because of the sheer volume and scope of service clusters in genomics, biotech pharma, healthcare and insurers.

## Genomics

In the 1990s, the National Institutes of Health (NIH) initiated partnerships with four research centers to sequence the human genome. Washington University in St. Louis was one of the four research institutions, and today is a world leader in genomics as a result. The McDonnell Genome Institute (MGI) at Washington University is a world leader in the fast-paced, constantly changing field of genomics. This innovative institution is pushing the limits of academic research by creating, testing, and implementing new approaches to the study of biology with the goal of understanding human health and disease, as well as the evolution and biology of other organisms.

As one of only three NIH-funded, large-scale sequencing centers in the United States, MGI is helping to lead the way in high-speed, comprehensive genomics. Since its inception in 1993, the institute has played a vital role in the field of genome sequencing, receiving over \$800 million in funding. MGI began as a key player in the Human Genome Project — an international effort to decode all six billion letters of our genetic blueprint — ultimately contributing 25 percent of the finished sequence.

## Biotech Pharma

Washington University School of Medicine (WUSM) is an international leader in science and biomedical research. It is consistently in the top four National Institutes of Health, funding recipients with research and development expenditures annually, totaling more than \$600 million. Ranked No. 7 in research by U.S. News & World Report, WUSM has several additional programs with top 10 rankings and has been an international trailblazer in Alzheimer's disease, genomics, personalized medicine, neuroscience, immunotherapy, and immunology.

BioGenerator is a privately funded, not-for-profit organization associated with Washington University, which was created to help build successful, sustainable St. Louis-based biotech companies. In 2010, BioGenerator was awarded one of six \$1 million grants nationally by the U.S. Department of Commerce for its innovative approach to transforming university discoveries into new companies. The BioGenerator assists emerging companies in a variety of ways, including seed money to-date of more than \$5 million in over 40 companies, accelerator labs to establish laboratory operations and initiate proof-of-concept studies, and a preseed Spark Fund for early business and technology ideas that are not mature enough to qualify for seed funding.

The Center for Emerging Technologies (CET), a nationally recognized bioscience incubator, assists companies with office and laboratory space, direct services, and connection to resources to develop their technology, grow their business, and obtain funding from angel and venture capital, federal grants, corporate contracts, and other sources. Most of CET's 45 companies are in medical technologies: therapeutics, diagnostics, instruments, and devices, and have been developing next-generation technologies to address unmet needs regarding cancer, cardiovascular health, diabetes, Alzheimer's, ophthalmology, and pharmaceutical manufacturing. Co-location with nonmedical technologies has resulted in a cross-fertilization of biosciences with engineering, nanomaterial, and IT expertise.



Cortex is a 240-acre urban bioscience district founded in 2002 by Washington University in St. Louis, Saint Louis University, the University of Missouri – St. Louis, BJC HealthCare, and the Missouri Botanical Garden, which collectively conduct more than \$600 million of bioscience research annually. To date, 340,000 square feet of lab and office has been developed, and more than \$110 million has been invested in the district.

## Healthcare Providers/Insurers

There are multiple healthcare providers in St. Louis that could be potential collaborators or partners with Amazon. Four of the largest include BJC, Mercy, SSM, and Ascension.

### Barnes Jewish HealthCare (BJC)

BJC is one of the largest nonprofit healthcare organizations in the United States, and is focused on delivering services to residents in the greater St. Louis, Southwestern Illinois and mid-Missouri regions. With net revenues of \$4.8 billion, and 31,000 team members, BJC serves the healthcare needs of all types of communities, and includes 15 hospitals and multiple community health locations. BJC is the largest provider of unreimbursed care and community benefits in the state of Missouri, providing more than \$285 million in unreimbursed care annually. Additionally, BJC provides community benefits through commitments to research, emergency preparedness, regional healthcare safety net services, medical and nursing education, health literacy, community outreach and regional economic development.

For 20 consecutive years, BJC and its physician partners at WUSM have been listed among the nation's elite medical centers in U.S. News & World Report's annual Honor Roll ranking. BJC was ranked nationally in all 12 data-driven specialties and received the highest rating possible – High Performing – in all nine categories of the U.S. News & World Report Ratings for Procedures and Conditions. In pediatric rankings, BJC's St. Louis Children's Hospital was rated among the Best Children's Hospitals in the country in all 10 ranked pediatric specialties.

### Mercy

Mercy was named one of the top five large U.S. health systems in 2017 and 2016 by Truven Health Analytics; an IBM Watson Health company, and the only independent study of its kind to use rigorous analysis of patient care for more than 300 health systems and nearly 3,000 hospitals. (The designation puts Mercy on par with Mayo Clinic and Scripps Health, who were also in the top five.)

Mercy includes 44 acute care and specialty hospitals (heart, children's, orthopedic, and rehab), more than 700 physician practices and outpatient facilities, 40,000 co-workers, and more than 2,000 Mercy Clinic physicians in Arkansas, Kansas, Missouri, and Oklahoma. Mercy also has outreach ministries in Arkansas, Louisiana, Mississippi, and Texas. Mercy operations across the greater St. Louis area include five hospitals with more than 1,800 inpatient beds, a workforce of approximately 13,500, including 650 Mercy Clinic physicians, and headquarters for the Mercy health system and major divisions, including supply chain and information technology.

Mercy's supply chain, ROi, is one of the world's top healthcare supply chain operations. ROi has been named to the Gartner Healthcare Supply Chain Top 25 List for eight consecutive years; the only healthcare provider in the world to make it in the Top 10 for all eight years. (Gartner is an independent firm that ranks supply chains across the world, including companies like Apple, Dell, Walmart, Mayo Clinic, Cleveland Clinic, Johnson & Johnson, etc.).

Mercy was named a 2016 "Most Wired" healthcare organization by the American Hospital Association – the 13th time since 1999 – and among only a dozen health systems to be designated as advanced for using data to improve chronic disease management services, and also to enhance treatment protocols for improved care. In addition, Mercy was named an "Elite 100" finalist by InformationWeek for its information technology, alongside top business technology innovators such as Coca-Cola, FedEx, and Boeing. Mercy's comprehensive build-out of its EHR has been recognized by Epic – the Wisconsin-based software developer – as one of only three health systems to be awarded the Epic Gold Stars achievement. Mercy was the first in the nation to earn Epic's accreditation to extend EHR services to other organizations, and is Epic's only client to achieve both awards.



## Ascension

Ascension, the largest nonprofit healthcare system in the United States and the world's largest Catholic healthcare system, is based in St. Louis. Ascension is composed of two divisions. One of which, the Healthcare division, includes Ascension Medical Group and Ascension Living, based in St. Louis. Several of Ascension's Solutions Division subsidiaries also are based in St. Louis, including Biomedical Engineering, Clinical Care Management, Information Services, Risk Management, Physician Practice Management, The Resource Group, Ascension Holdings, Ascension Global Mission, Ascension Ventures (venture capital investing), Ascension Investment Management, and contracting through Ascension's own group purchasing organization.

At the end of the fiscal year on June 30, 2017, Ascension provided more than \$1.8 billion in care of persons living in poverty and other community benefit programs. With total assets of \$34.3 billion, Ascension achieved total operating revenue of \$22.6 billion. Ascension operates hospitals with 22,534 total beds and last year welcomed more than 84,000 newborns to the world. The integrated national health system includes approximately 150,000 associates and 36,000 aligned providers. Ascension's Healthcare Division operates 2,500 sites of care — including 141 hospitals and more than 30 senior living facilities — in 22 states and the District of Columbia.

Rooted in its mission of serving all persons, Ascension has a vision to lead the transformation of healthcare, both in the U.S. and internationally. Since 2001, Ascension has operated its own venture capital subsidiary focused on healthcare innovation, now with four funds and more than \$800 million in assets under management. Ascension Ventures provides financial and strategic returns, including key insights into emerging technologies, products, and services. Also in St. Louis, Ascension's Innovations Accelerator Team and New Virtual Market Development and Incubations group nurture innovative solutions, such as virtual care, with the potential to accelerate the transformation of healthcare.

## SSM

SSM Health is a Catholic, not-for-profit health system with care delivery sites in Illinois, Missouri, Oklahoma, and Wisconsin. SSM Health includes 20 hospitals, 63 outpatient care sites, a pharmacy benefit company, an insurance company, two nursing homes, comprehensive home care and hospice services, a technology company, and two Accountable Care Organizations. With more than 9,500 medical staff and more than 35,000 employees in four states, SSM Health is one of the largest employers in every community it serves. An early adopter of the electronic health record (EHR), SSM Health is a national leader for the depth of its EHR integration.

The health system is also internationally recognized for its commitment to quality and continuous improvement, as evidenced by the fact SSM Health was the first healthcare organization in the country to win the prestigious Malcolm Baldrige National Quality Award.

SSM Health Cardinal Glennon Children's Hospital, named among the nation's best children's hospitals by U.S. News and World Report, works with pediatric specialists from Saint Louis University School of Medicine. It is home to a Level IV Neonatal Intensive Care Unit (NICU) — the highest level of designation — and its doctors, nurses, and specialists provide the highest level of care for the most complex diagnoses. St. Louis Fetal Care Institute, a program of SSM Health Cardinal Glennon, is one of just a few healthcare organizations in mid-America to offer life-saving fetal interventions. Physicians at the Fetal Care Institute can perform surgery on babies still in the womb to correct congenital conditions that would have resulted in severe birth defects or even death a decade ago.

## Research on Aging and Alzheimer's

As Amazon continues to evolve to meet the needs of customers, there is an opportunity for Amazon to leverage research in St. Louis to explore how to reach a population of over 50 million seniors in the U.S. This is the first time in the history of the U.S. where we will see over 50 million people aged 65 and older. Americans are experiencing a longer life expectancy, and quality of life is paramount for this portion of our population. As a result, Amazon may be interested in the research on aging at Washington University's School of Medicine in St. Louis (WUSM).

WUSM is broadly acknowledged as the global leader in research on Alzheimer's disease and on the microbiome. To capitalize on these unique programs, WUSM is planning groundbreaking initiatives in personalized medicine, aging, and development of pre-biotics, which are foods designed to promote health and target specific diseases by personalized effects on the microbiome. Initiatives include the study of the relationship between Alzheimer's and the aging process; related drug therapy trials to slow aging will start in the next five to seven years.

## Cancer Research

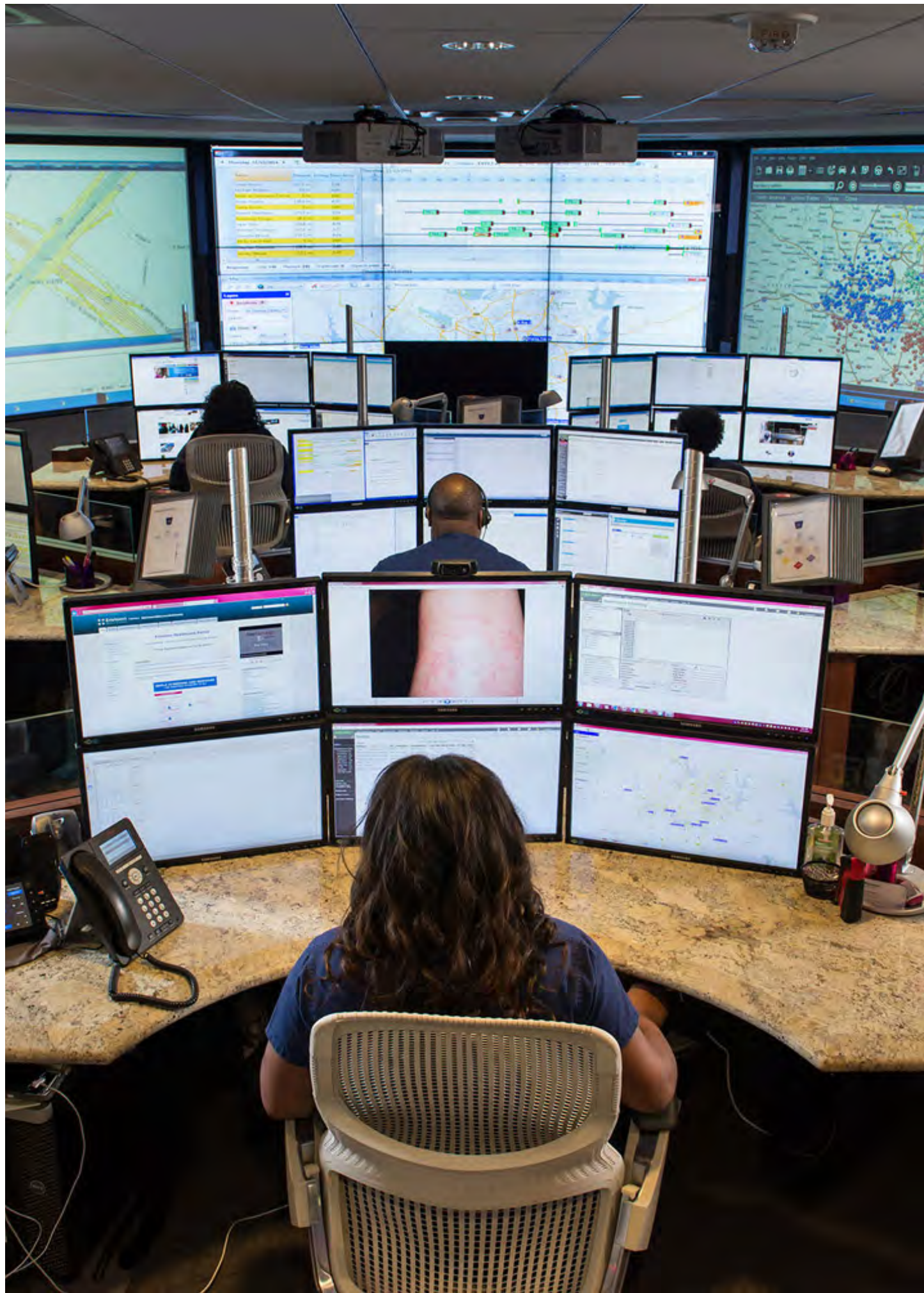
Cancer research is another vertical of research excellence in St. Louis. The potential of a cancer vaccine captures the imagination of doctors and patients alike because of the potential for transformational impact. Cancer research is at the intersection of urgent need and lasting impact, and The Siteman Cancer Center at BJC and WUSM is ranked among the top cancer treatment centers by U.S. News & World Report. Siteman is also one of only a few cancer centers to receive the highest rating — "exceptional" — from the National Cancer Institute (NCI).

Because of its regional market dominance in cancer care and specialty medicine, the partnership between WUSM and BJC is unique among academic medical centers in the Midwest, and is comparable to Johns Hopkins, Harvard, Stanford, and the University of California – San Francisco. Long recognized for its world-class research in basic immunology, WUSM is also home to one of the leaders in the science of cancer vaccines, Dr. Robert D. Schreiber. As a result, people from all over the world travel to the Siteman Cancer Center of BJC/WUSM for unique clinical trials of cancer vaccines and immunotherapy.

Siteman is the only NCI-designated Comprehensive Cancer Center in Missouri, or within a 240-mile radius of St. Louis. Siteman offers a multidisciplinary team of more than 300 preeminent clinicians and medical researchers. In 2006, the National Comprehensive Cancer Network, an alliance of the world's leading cancer centers, added Siteman to its roster of 20 centers dedicated to improving the quality, effectiveness, and efficiency of oncology practices.

Scientists and physicians affiliated with Siteman hold more than \$145 million annually in basic and clinical oncology research grants. The results of basic laboratory research are rapidly incorporated into treatment advances, which are enhanced by patient access to 375 therapeutic clinical trials, including many collaborative efforts with other leading cancer centers throughout the country. In addition to treatment and research programs, Siteman pursues an active outreach program of cancer screening and education that involves tens of thousands of individuals annually throughout the St. Louis region.





## Virtual Healthcare and IT

Innovation in healthcare is unrelenting, and St. Louis is leading the way. Multiple organizations are coming together to encourage the development of next-generation technologies that can be commercialized. What follows is a partial summary of regional partnerships designed to inspire more innovation and commercialization in biotech, healthcare, and pharma.

If Amazon is exploring telemedicine and the creation of health apps to better connect patients and doctors, St. Louis-based Mercy Virtual Care Center, the world's first virtual healthcare center, could be of interest. Mercy's telehealth center is cited as the second-best medical breakthrough of 2016 by Prevention magazine. Mercy Virtual Health is taking medicine to patients where they are, offering even isolated rural communities world-class care, and harnessing technology to improve the human condition. Mercy's virtual care program is a nationally recognized center for developing and delivering telehealth.

Mercy was also among the first healthcare organizations in the U.S. to have a comprehensive, integrated electronic health record providing real-time, paperless access to patient information.

Ascension is also heavily invested in the use of technology through its information technology subsidiary, Ascension Information Services, also based in St. Louis. It's one of the largest healthcare IT service organizations in North America with an annual operating budget of more than \$1 billion, and a capital budget in excess of \$250 million. It ranks No. 33 on the Computerworld Best Places to Work in IT list among large corporations.

Over the past 10 years, SSM Health has invested \$7 billion in technology and infrastructure necessary to ensure communities have seamless access to world-class care, close to home. SSM was an early adopter of the electronic health record (EHR), and is a national leader for the depth of its EHR integration. SSM Health is regularly named as one of the nation's Top Most Wired Hospitals by the American Hospital Association.

## Innovative Partnerships

BJC and WUSM are set to launch the Health Systems Innovation Lab. This effort is focused on developing innovative ways to deliver care and improve an individual's health. Cross-disciplinary in nature, the lab will bring together clinicians, patients, researchers, public health experts, and private industry to find solutions to problems that prevent patients from receiving optimal care. BJC has committed \$20 million over the next 10 years to support the lab.

The Children's Discovery Institute, a joint venture between St. Louis Children's Hospital (SLCH) and WUSM, focuses research, diagnostic, and treatment resources on four pediatric diseases with genetic origins — congenital heart, lung and respiratory, cancer and musculoskeletal, and metabolic diseases. Using a team-based research model, the institute enables SLCH to leverage the intellectual and physical resources of Washington University, including access to human genomics, to advance the health of children.

Saint Louis University School of Medicine is widely recognized for its expertise in immunology and bioterrorism, and is one of six sites designated by the National Institutes of Health for viral vaccine clinical trials. The school is focused on doubling its research budget to \$100 million in the next five years, and establishing offices within the Cortex Innovation Community to work closely with startup life-sciences organizations on innovative healthcare solutions.

The University of Missouri – St. Louis houses a leading international center for tropical ecology, the Center for Nanoscience and the Medicinal Chemistry Group, which develops novel small-molecule therapies in a wide range of therapeutic areas, including a special emphasis in the area of orphan and neglected diseases.

Sling Health was founded in 2013 at Washington University in St. Louis, to bring together students, faculty, staff, and local entrepreneurs to tackle unmet needs in healthcare delivery and clinical medicine. With the guidance of a clinician mentor and technical advisors, teams of engineering, medical, business, and other students brainstorm and vet a panel of designs based on patient and physician needs, and on the intellectual property and regulatory environments.



# Sustainable Solutions to Feed the World are Here

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The global population is projected to hit nine billion by 2050, with food demand rising 70 percent over current consumption. Agricultural output isn't rising fast enough to keep up with that kind of demand. Access to clean water is already difficult for 1.1 billion people worldwide — that number increases to 2.7 billion for at least one month per year. That leads to inadequate sanitation, which in turn leads to disease and death for two million people — most of whom are children — every year. By 2025, two-thirds of the global population may not have adequate access to potable water.<sup>1</sup>

Total world energy consumption is expected to increase 28 percent by 2040. As that demand increases, so does the demand for clean and renewable energy sources that reduce environmental impact. St. Louis is home to multiple energy companies including Ameren and Spire, both of which have a vested interest in renewable energy. As a result, clean-energy startups are taking root in St. Louis.

The opportunities are extraordinary. Together, we can bring St. Louis solutions to global problems including food production, access to safe water, and advancements in clean energy. That's thinking big. St. Louis also offers talent at scale — more than 1,000 plant science PhDs — the largest concentration in the world. We're already thinking big, but we can think bigger together.

St. Louis' 39 North Innovation District is where the best minds in food, water, energy, and the environment converge, collide, and collaborate to solve the world's biggest challenges and advance the human condition. 39 North is within 500 miles of 50 percent of all U.S. farm production value, 77 percent of U.S. corn acreage and 81 percent of soybean production. Named for the 39th parallel — the prime agricultural belt around the world — 39 North brings together the incredible assembly of bioscience organizations in one cohesive district.

A sampling of 39 North Innovation District partners include:

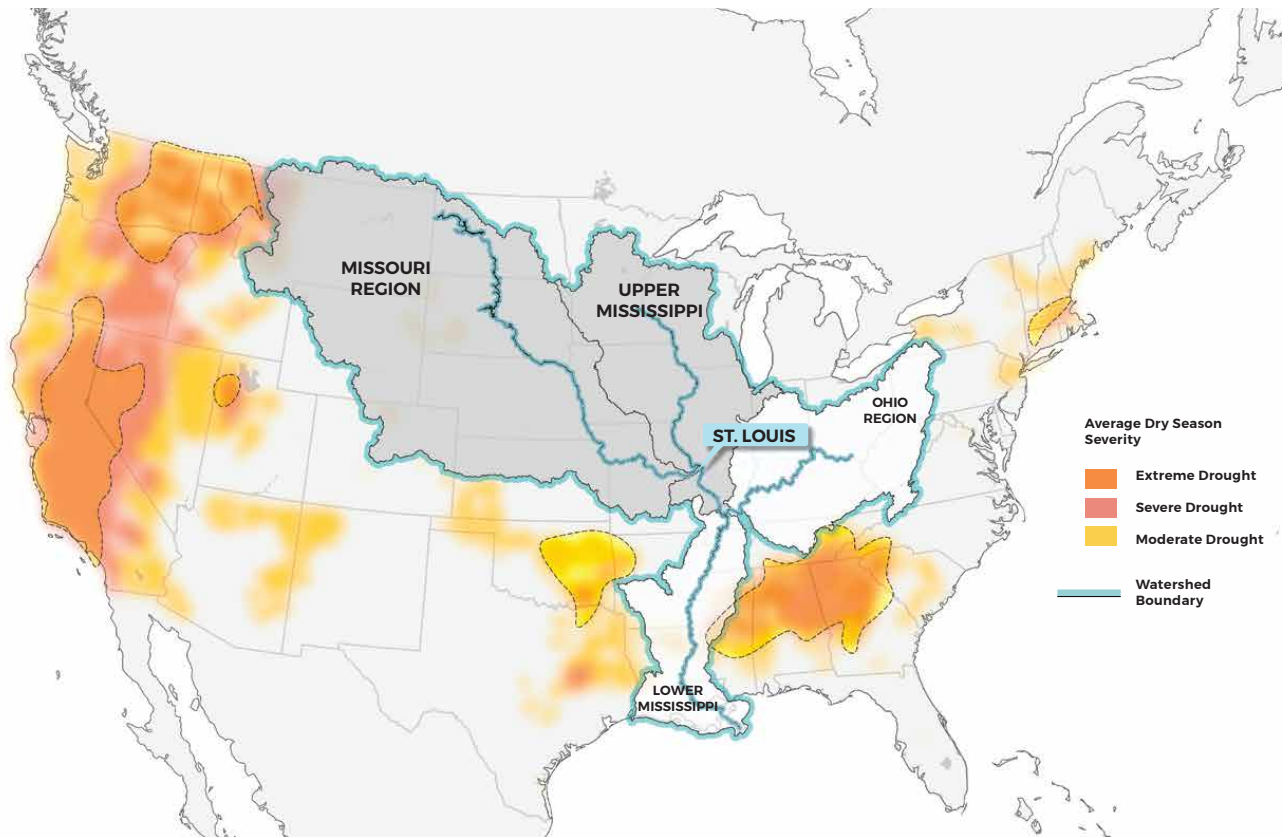
- **Monsanto:** One of the world's largest agricultural companies is developing tools to help growers protect natural resources, while providing nourishment to the world in the face of a changing climate and other environmental challenges. Monsanto spends more than \$1.5 billion annually on research and development.
- **Donald Danforth Plant Science Center:** The world's largest independent plant science institute and one of the world's premier research institutions, which employs 350 scientists from across the globe. Research is focused on enhancing plant nutrition, increasing agricultural production, reducing the use of chemicals, and developing biofuels. The Center recently received \$11.9 million from the Bill & Melinda Gates Foundation, Monsanto Fund, and the Howard G. Buffett Foundation for the Virus Resistant Cassava for Africa (VIRCA) project. It is also the lead on a \$49 million grant from the U.S. Department of Energy for the National Alliance for Advanced Biofuels and Bioproducts (NAABB), a nationwide collaboration of universities, companies and federal labs. As one of the most technologically advanced bioscience facilities in the world, the center's research is conducted with the goal of finding global solutions to global problems.
- **Missouri Botanical Garden:** One of the world's top botanical research and conservation institutions. Its Tropicos database is the world's largest database of plant information, and its Herbarium is one of the world's outstanding research resources for plant specimens. The Garden is a world leader in systematics — the study of plants and their evolution. Every year, Garden researchers collect about 150,000 plant specimens from around the world and describe more than 200 new species.

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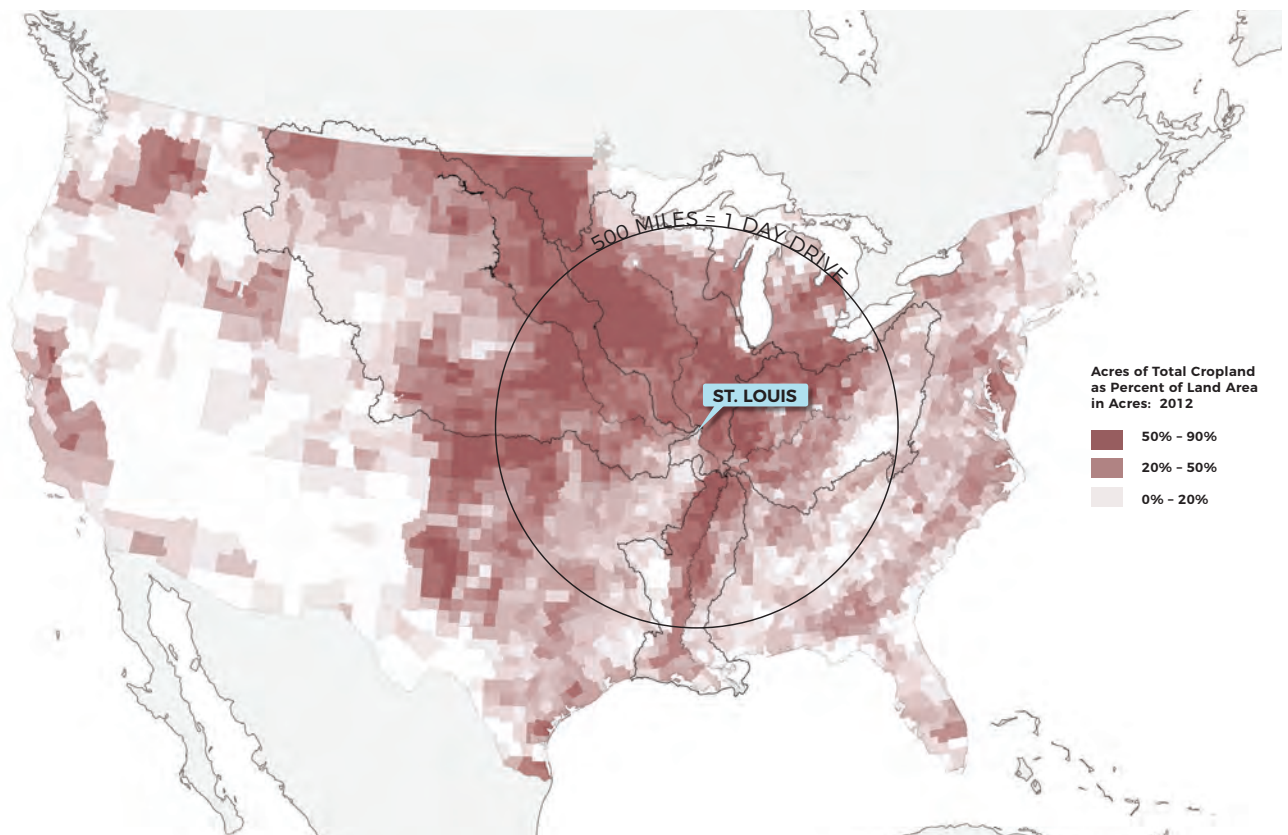
<sup>1</sup> United Nations June 2017.



## A Water-Rich Location



## Breadbasket of the U.S.



# Transformational Opportunity for Social Impact is Here

---

Amazon's impact in St. Louis would be more than jobs and construction. It would be an epic shift in the right direction with an influx of new civic partners, volunteers, and philanthropists. St. Louis would benefit from the arrival of 50,000 Amazonians — and Amazon could have a massive impact as St. Louis emerges as a leader in the social reform movement that is taking shape across America.

We are looking for new partners as we envision a future for St. Louis that is deliberately different. That requires different thought leadership at scale. We are also looking for a partner to join us in transformational development, and Amazon has that experience given its stimulus effect in the South Lake Union and Denny Triangle neighborhoods in Seattle. And we anticipate the lessons learned in Seattle with regard to gentrification could be applied in St. Louis to the mutual benefit of St. Louis and Amazon.

For people outside St. Louis, our region is often defined by the civil unrest in Ferguson in 2014. That civil unrest may ultimately be the flashpoint that historians point to as a positive catalytic moment for the region. As a result, our region is “beta testing” solutions to advance social and economic mobility for all of St. Louis. This testing is how St. Louis is ultimately going to lead by example, and the magnitude of the potential disruption is palpable. In this environment, Amazon has a unique opportunity to accelerate our region's path toward equity by putting people to work, by demanding more tech talent and by partnering with elected officials to design transit and housing infrastructure in St. Louis' urban core.

## What We've Learned So Far

The Ferguson Commission's “Forward Through Ferguson Report: A Path Toward Racial Equity” is an example of the thought leadership in St. Louis. The report was nationally lauded as a strong blueprint for how to develop calls to action to inspire change. Since the report was released in 2015, municipal court consolidations have streamlined operations, saved hundreds of thousands of dollars, and reduced the use of municipal courts as revenue generators.<sup>2</sup> No Missouri school districts scored in the unaccredited range in the last annual evaluation period, and the two previously lowest-scoring districts made significant improvements in their scores.<sup>3</sup> Infant mortality rates in the Normandy school district — made up of 24 communities in North St. Louis — are down 30 percent.<sup>4</sup>

That being said, there is tremendous opportunity to cultivate strong partnerships with corporate entities like Amazon, the public sector and the community as a whole. Implementation of the calls to action in the report requires unrelenting pressure on public and private entities to generate social impact in communities that create opportunities for everyone to thrive. New partnerships will inform new policies that will shape our region's future. Through civic engagement, Amazon would be an exciting partner in shaping these new policies that will help foster equity and social justice in St. Louis.

---

2 “Beyond Housing and the Supreme Court of Missouri announce partnership to reform courts” press release, Beyond Housing, Oct. 11, 2016.

3 “Progress report: No Missouri school district scored in unaccredited range this year” St. Louis Public Radio report, Nov. 7, 2016. <http://news.stlpublicradio.org/post/progress-report-no-missouri-school-district-scored-unaccredited-range-year#stream/0>

4 “A St. Louis organization goes above and beyond providing homes for communities: an interview with Chris Krehmeyer, president and CEO of Beyond Housing,” Democracy Collaborative, <http://democracycollaborative.org/content/st-louis-organization-goes-above-and-beyond-providing-homes-communities>



## How We're Moving Forward

St. Louis is part of several major national programs, including Promise Zones, Choice Neighborhoods, and the Resilient City. East St. Louis, also part of the proposed River Campus, is developing a path forward to improve the livability of its community as well.

### Resilient St. Louis

The city is proud to be part of the 100 Resilient Cities pioneered by the Rockefeller Foundation, which helps cities around the world become more resilient to the physical, social, and economic challenges that are a growing part of the 21st century. Resilient St. Louis has five discovery areas: prioritize equity, build trust in government, create cohesive communities, prepare for climate change, and foster regional/national collaboration inclusive of all populations.

Part of those efforts include St. Louis' participation in the Strong Cities Strong Communities (SC2) program. The White House Council on SC2 brings together 19 federal agencies to work in partnership with elected officials as they implement locally driven economic visions. The program is an innovative approach for supporting cities experiencing population and job loss. SC2 consists of four components: SC2 Deployed Federal Community Solutions Teams, SC2 National Resource Network, SC2 Fellows and AmeriCorps VISTA volunteers, and the SC2 Economic Visioning Challenge.

### East Side Zone

The proposed River Campus includes St. Clair County, IL. Due to decades of decline, there are large parcels of underutilized ground — over 100 acres. The City of East St. Louis is the most populous municipality in the East Side Zone, but many of the adults are not currently in the labor force. Although several employers are located in the area, that hasn't meant residents are able to find employment. Amazon would be a potential partner for job-training programs in partnership with regional workforce development agencies who are now accelerating their focus.

Confidence in the potential for development in the East Side Zone is improving. Recently, Associated Bank spent \$750,000 renovating their East St. Louis branch. Another bank, Regions, built a new facility in the Zone within the last five years. The East St. Louis Alliance convenes an inclusive group of stakeholders representing diverse sectors to improve outcomes for all populations in the area through collective impact. This area is poised for commercial and residential development, and local officials see the potential for St. Clair County to be a tremendous partner to Amazon, to the mutual benefit of the company and area residents.



## Promise Zone

Promise Zones are high-poverty communities where the federal government partners with local leaders for a 10-year period to increase economic activity, improve educational opportunities, increase workforce readiness, improve health and wellness, develop sustainable communities, and address other priorities identified by the community.

The federal designation as a Promise Zone helps local leaders access proven tools to rebuild neighborhoods and put people back to work. Designated in 2015, the Promise Zone encompasses portions of North St. Louis City and North St. Louis County, and is a catalyst for ongoing collaboration and change that will drive regional growth and create a better, more inclusive St. Louis region.

St. Louis is the largest Promise Zone nationally of the 22 communities with the designation, and the only one that crosses jurisdictional boundaries, representing approximately 200,000 residents. Through this designation, the region has successfully secured over \$70 million in federal funding. This is in addition to the \$1.75 billion investment for the new National Geospatial-Intelligence Agency's Western Headquarters, adjacent to the Near North Side regeneration project.


St. Louisans in the Promise Zone need and want quality jobs. This includes a percentage of low- to moderate-income individuals who are seeking training and career pathways that have the potential for growth. Because of Amazon's extensive hiring needs, there is the opportunity for the company to model best practices for intentional and authentic engagement of residents through partnership with the region's dynamic workforce development agencies.

Youth-focused workforce development is also an opportunity for Amazon to be impactful. By supporting and expanding regional career pathway programs, Amazon could ignite more interest and participation in youth-centric apprenticeships and internships. In addition, there is the potential to bring more attention and urgency to the need for progressive and inclusive scholarship programs to two- and four-year colleges and universities, and qualified training around careers in technology and entrepreneurship. Success would result in an expanded pipeline of STEM talent for all employers in the St. Louis region.

Consistent with Amazon's commitment to community investment, the proposed River Campus provides a unique opportunity for the company to lead the expansion of existing support organizations in the region's urban core. In addition, the proposed building sites would ignite improvement to strategic infrastructure inclusive of affordable housing. Amazon's social impact initiatives would be embraced by St. Louis' most progressive nonprofit, faith-based, civic, philanthropic, educational institutions and youth-focused organizations.

Additionally, local educational institutions and workforce development programs are poised to scale existing programming and develop new programs to meet Amazon's labor force needs. This includes apprenticeships, certification opportunities, and job-readiness training programs. Partners already working within the Promise Zone include LaunchCode, Mission:STL, SLATE, the United Way of Greater St. Louis, the Urban League, and seven public school districts within the Zone.

## Promise Zone Demographics



**199,792**  
POPULATION

HOUSEHOLDS EARNING < \$20,000

**20%**

**36%**  
POVERTY\*

**61%** FAMILIES  
THAT ARE  
RENT-BURDENED\*\*

**28%**  
UNEMPLOYED  
RESIDENTS

POPULATION OVER  
25 YEARS OF AGE  
WITH **NO** HIGH SCHOOL  
DIPLOMA

**19%**  
**7%** DROP OUT RATE

**\$10,725,550** PRIVATE  
INVESTMENT

**28**

MUNICIPALITIES

**11**

CITY  
WARDS

**7**

SCHOOL  
DISTRICTS

**25**

ZIPCODES

**\$70M**

FEDERAL  
FUNDED

\* Defined as living 185% below federal poverty line

\*\* Spending more than 30% of household income on rent alone

# A Template for Redevelopment through Engagement

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The Near North Side (NNS) received both Choice Neighborhoods (CN) planning and implementation grants. These grants focus on housing, people, and neighborhoods. This development has become a catalyst for community engagement and evidenced-based strategies that address the neighborhood's most critical challenges. This collaborative work was instrumental in the city's successful efforts to attract the National Geospatial-Intelligence Agency's (NGA) \$1.8 billion, more than 3,000-employee western headquarters to NNS.

NGA's investment is complemented by a \$5 million stretch of the Great Rivers Greenway's 600-mile network of greenways around the St. Louis region, a \$1 million Byrne Criminal Justice Innovation Grant, the \$8 billion NorthSide Regeneration Plan (\$2 billion has already been deployed), and significant investment in historic housing rehabilitation in the Old North neighborhood, including the 675-unit affordable and subsidized Preservation Square (PS). All housing will be sustainably designed, constructed and managed to high-quality, market-rate standards, surrounded by redeveloped and reconnected infrastructure, and significantly expanded and improved recreation, management, and community spaces.

The proposed River Campus will create jobs even before Amazon occupies space as many vendors and retail businesses will co-locate near the site of HQ2. Construction of HQ2 will benefit minority- and women-owned firms and local trade organizations, and encourage expansion of apprenticeship, internship, and journeyman opportunities as a result of Amazon's anticipated construction needs. In addition, this is an opportunity for Amazon to lead inclusion in major construction projects and procurement policies by utilizing first-source and community-benefit agreements, in partnership with regional workforce development agencies and residents surrounding the proposed River Campus.





## Day One is Here

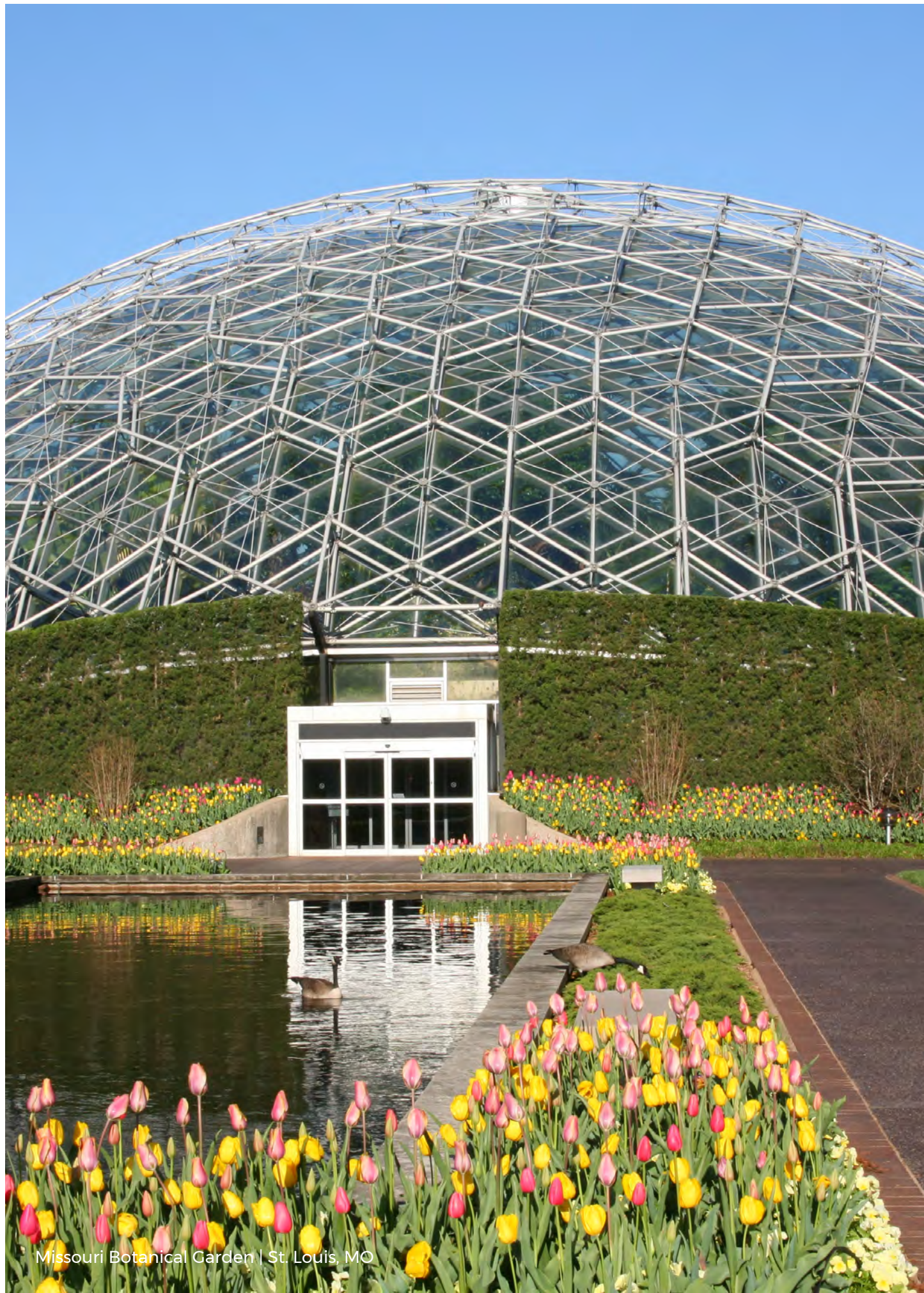
Amazon isn't a typical company. It's a disruptor. And by challenging the status quo, it's a catalyst for change.

St. Louis isn't a typical city. It's resilient.

St. Louis is thinking big — but more than that, we're doing big right now. We have a vision, we have a blueprint, and we're working together to change our future and impact the world at the same time.

If Amazon wants to make a profit, make a difference, and keep Amazonians happy from Day One, there's no better place to be than St. Louis. Together, we can build The Great Global City.





Missouri Botanical Garden | St. Louis, MO





**LETTERS  
OF SUPPORT**





# LETTERS OF SUPPORT

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September 28, 2017

Jeff Bezos  
Chief Executive Officer  
Amazon  
Office of Economic Development  
c/o Site Manager Golden  
2121 7th Avenue  
Seattle, WA 98121

[Civic Progress](#), a group of CEOs and leaders from 32 of the largest companies in Missouri, is committed to making the St. Louis region a destination of choice for employers, residents and visitors. Representing nearly 150,000 employees and \$420 billion in worldwide revenue, we are writing to you to say St. Louis is the perfect location for the new Amazon HQ2.

Amazon's investment plans for a new headquarters will have a major impact on transforming the St. Louis region for generations. Home to some of the nation's most respected corporations, we focus on ways we can help improve education, regional collaboration and infrastructure in the region. We would welcome the opportunity to have you visit St. Louis and meet Civic Progress members to hear about our vision for the region.

Impact and innovation are core values for St. Louis. We have a long and storied history of investing in projects that improve the economic vitality and quality of life for our citizens. In recent years, Civic Progress led the public/private partnership in a regional effort to transform the area around the Arch, the iconic masterpiece gracing our riverfront. Additionally, we supported our regional economic development team in bringing major projects to St. Louis, including the new National Geospatial-Intelligence Agency West Headquarters and Boeing's 777X wing assembly, our region's re-entry into commercial aviation production. Microsoft and Square also have opened significant operations here.

Anchoring the emerging renaissance for the St. Louis region are three major research universities: Washington University in St. Louis; Saint Louis University; and the University of Missouri. Moreover, we have several initiatives fostering investments in new, exciting growth: the [Cortex Innovation Community](#), home to a vibrant 200-acre innovation hub and technology district; [39° Master Plan](#), a dynamic innovation district that will increase our worldwide leadership in AgTech by driving leading-edge research in food, water and energy; [T-REX](#), which attracts innovation to downtown St. Louis as a co-working space and technology incubator; and [Arch Grants](#), a nonprofit that provides equity-free grants and pro bono support services to entrepreneurs who locate their early-stage businesses in St. Louis through its Global Startup Competition.

St. Louis is the ideal place for Amazon's HQ2. We have the creativity, grit and drive to create the impact you seek. Join us.

To arrange a meeting with Civic Progress, please contact [Suzanne Sitherwood](#), president, or [Tom Irwin](#), executive director, (314) 520-6641.

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800 MARKET STREET, SUITE 1900, ST. LOUIS, MISSOURI 63101-2695 PHONE 314.206.8523 FAX 314.206.8514 [www.civicprogressstl.org](http://www.civicprogressstl.org)



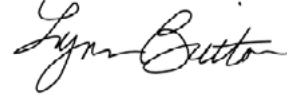
Very truly yours,



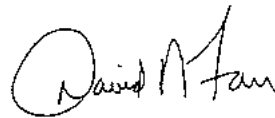
Warner L. Baxter  
Chairman, President and CEO  
Ameren Corporation



Stephen F. Brauer  
Chairman  
Hunter Engineering Company



Lynn Britton  
President/CEO  
Mercy



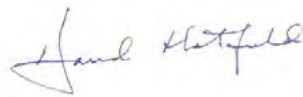
David N. Farr  
Chairman and CEO  
Emerson



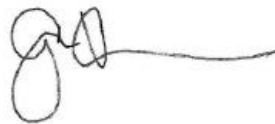
Sam Fox  
Founder  
Harbour Group



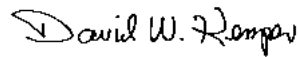
Hugh Grant  
Chairman and CEO  
Monsanto Company



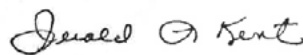
David P. Hatfield  
Chairman of the Board and CEO  
Edgewell Personal Care Company



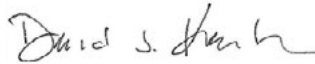
Glenn Kellow  
President and CEO  
Peabody Energy



David W. Kemper  
Chairman and CEO  
Commerce Bancshares, Inc.



Jerald L. Kent  
Chairman and CEO  
Cequel III, LLC



David Kowach  
President and Head of  
Wells Fargo Advisors



Peter Kraemer  
Chief Supply Officer  
Anheuser-Busch InBev



Ronald J. Kruszewski  
Chairman and CEO  
Stifel Financial Corp.



Shelley K. Lavender  
Senior Vice President, Strike,  
Surveillance and Mobility  
The Boeing Company



Steven H. Lipstein  
Chief Executive Officer  
BJC HealthCare



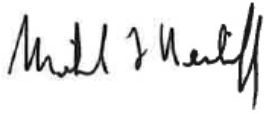
Anna Manning  
President and CEO  
Reinsurance Group of America,  
Incorporated



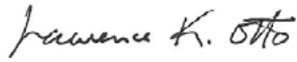
W. Stephen Maritz  
Chairman and CEO  
Maritz Holdings Inc.



Kathleen M. Mazzarella  
Chairman, President and CEO  
Graybar Electric Company, Inc.



Michael F. Neidorff  
Chairman and CEO  
Centene Corporation



Lawrence Otto  
St. Louis Market President  
U.S. Bank



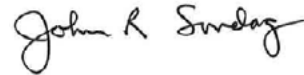
Dr. Fred P. Pestello  
President  
Saint Louis University



Todd R. Schnuck  
Chairman and CEO  
Schnuck Markets, Inc.



Suzanne Sitherwood  
President and CEO  
Spire



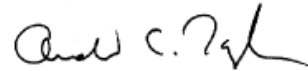
John R. Sondag  
President  
AT&T Missouri



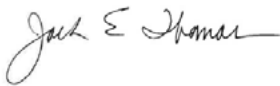
David L. Steward  
Founder and Chairman  
World Wide Technology, Inc.



Diane M. Sullivan  
CEO, President and Chairman of  
the Board  
Caleres, Inc.



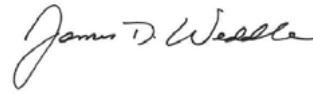
Andrew C. Taylor  
Executive Chairman  
Enterprise Holdings Inc.



Jack E. Thomas  
Chairman and CEO  
Coin Acceptors, Inc.



Mark C. Trudeau  
President and CEO  
Mallinckrodt Pharmaceuticals



James D. Weddle  
Managing Partner  
Edward Jones



Tim Wentworth  
President and CEO  
Express Scripts



Dr. Mark S. Wrighton  
Chancellor  
Washington University in St. Louis

September 28, 2017

Jeff Bezos  
Chief Executive Officer  
Amazon  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121



REGIONAL  
BUSINESS  
COUNCIL

Mr. Bezos,

The Regional Business Council (RBC) wholeheartedly supports our proposal to bring Amazon's second headquarters to the St. Louis region. The RBC, a consortium of 100 Presidents and Chief Executive Officers, represents many of the largest privately and publicly held companies in the 16-county, bi-state region. Our members employ more than 100,000 associates and generate more than \$65 billion in annual revenue. We focus our time and resources investing in high impact initiatives that improve the quality of life and the economic competitiveness of the St. Louis region.

We are home to a vibrant business community with direct access to national riverways, roadways, rail lines and ports. Our international airport is in a central location with newly designed cargo operations ready for major expansion. In addition, there is ample property owned by the airport that could be used for expansion facilities.

Our community is rich in technical innovation. Recently the National Geospatial Intelligence Agency selected St. Louis for their \$1.75 billion state of the art intelligence center. Our robust entrepreneurial/startup sector, supported not only by Cortex, our regional innovation district, but also T-Rex, our downtown innovation center. We are nationally recognized as one of the best entrepreneurial cities in the United States.

Our region is home to a myriad of outstanding universities, colleges and technical schools including the internationally recognized Washington University, St. Louis University, University of Missouri St. Louis and the nationally ranked HBCU, Harris-Stowe State University. Our civic and business leaders are committed to attracting, developing and retaining young talent in the region. To this end, the RBC established the Young Professionals Network (YPN) in an effort to support young diverse talent in our region by helping them build social and business networks. The network has grown to 4,000 professionals representing over 750 companies that are committed to the prosperity of the region.

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WWW.STLRBC.ORG



There is no doubt that St. Louis has many challenges, but we are committed to making St. Louis a place where all our citizens can prosper. Amazon would bring transformational change to this historic city. We strive to support this next chapter of our history.

Kathy Osborn



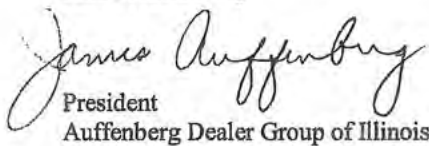
President and CEO  
Regional Business Council

John P. Stupp, Jr.



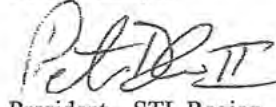
RBC Chairman  
President and CEO  
Stupp Bros., Inc.

Jamie Auffenberg



President  
Auffenberg Dealer Group of Illinois

Peter Blumeyer



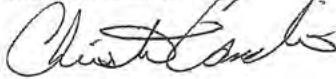
President – STL Region  
UMB Bank

Eric Brunngraber



Chairman, President and CEO  
Cass Information Systems, Inc.

Christine Candio



President and CEO  
St. Luke's Hospital

James Charnley




President and CEO  
Bull Moose Industries

Frank J. D'Antonio



President  
Aetna

L. B. Eckelkamp, Jr.



Chairman and CEO  
Bank of Washington

John H. Ferring, IV




Chairman  
PLZ Aerospace

Susan W. Graham



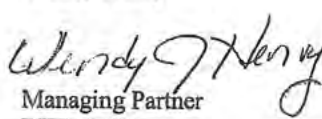
President and CEO  
ELANTAS PDG, Inc.

Michael F. Hart



Midwest Area President  
Regions Bank

Wendy Henry



Managing Partner  
BKD, LLP

John F. Herber, Jr.



Chairman and Managing Partner  
RubinBrown, LLP

Michael Holmes



Chairman  
Rx Outreach

Gerard J. Howe



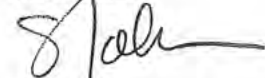
Chief Executive Officer  
Big River Communications

Carmen Jacob



President and CEO  
NextGen Information Services, Inc.

Sharon John



CEO and President  
Build-A-Bear Workshop, Inc.

Eric N. Johnson



St. Louis Managing Partner  
Deloitte

Laura Kaiser



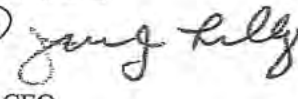
President and CEO  
SSM Health

Lawrence P. Keeley



CEO  
The Keeley Companies

Julia Lilly



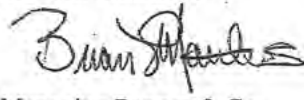
CEO  
St. Louis Trust Company

Alaina Macia



CEO  
MTM

Brian L. Matthews



Managing Partner & Co-  
Founder  
Cultivation Capital

Susan B. McCollum



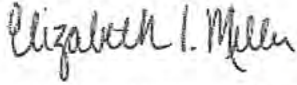
Chairman and CEO  
Major Brands Premium Beverage  
Distributors

Kevin McDaniel



President  
Lockton Companies

Elizabeth L. Miller



Chief Administrative Officer  
& CFO  
Nidec Americas Holding  
Corp

Robert D. Millstone



President  
The Millstone Company

Dean Mueller



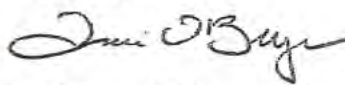
Market Leader, S. Central US  
Cushman & Wakefield

Robert L. Newmark



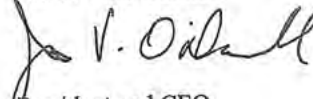
Managing Partner-SDt. Louis  
Bryan Cave LLP

Traci O'Bryan



President and CEO  
Arcturis

James V. O'Donnell



President and CEO  
Bush O'Donnell

Thomas E. O'Meara



Chairman and Managing  
Partner  
Moneta Group

Susan Pollmann



Program Director, Next NGA  
Campus West  
National Geospatial-Intelligence  
Agency

Patrick Quinn



CEO  
UnitedHealthcare - Heartland  
States

W. Thomas Reeves



St. Louis Market Chairman  
Busey Bank

Victor L. Richey, Jr.



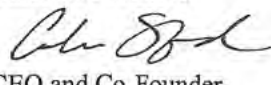
Chairman, CEO, and President  
ESCO Technologies Inc.

Rodger O. Riney



Founder and CEO  
Scotttrade Financial Services, Inc

Cassandra Sanford



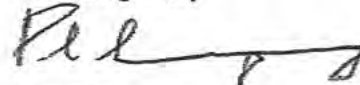
CEO and Co-Founder  
KellyMitchell Group

Michael J. Scully



Regional President - St. Louis, MO  
PNC Financial Services Group, Inc.

Paul Shaughnessy



President  
BSI Constructors





Urban League of  
Metropolitan St. Louis, Inc.

**Empowering Communities.  
Changing Lives.**

October 10, 2017

To Whom It May Concern,

On behalf of the Urban League of Metropolitan St. Louis, I would like to pledge our support in bringing Amazon's second headquarters to the St. Louis region. As an affiliate of the oldest civil rights and advocacy, social service, and community empowerment organization in the United States, the Urban League knows what St. Louis has to offer. Amazon will have a unique opportunity to be a part of the transcendence of St. Louis, Missouri—a historic city rich with culture, working to reinvent ourselves to remain competitive with other cities in this nation.

In an effort to ignite change in this community, the Urban League of Metropolitan St. Louis, along with the Salvation Army, University of Missouri—Extension program, and Lutheran Church—Missouri Synod, opened the Ferguson Community Empowerment Center in the summer of 2017. The center was constructed on the site of the Quiktrip that burned to the ground in 2014 during the unrest that was in response to the death of Michael Brown, Jr. in Ferguson, Missouri, that sent shockwaves through this region and the nation. (The land for that development was generously donated by Quiktrip Corporation as a way to be a part of transformative efforts in this community.) Presently, this site once seen as a symbol of pain is now a symbol for a variety of services in education, job training and placement, financial assistance and spiritual care for individuals who are underprivileged and/or re-entering the community after incarceration.

We at the Urban League understand that a good paying job is one of the single most successful social welfare programs there is. Providing sustainable economic opportunities for individuals can have positive effects on many different areas of a community, specifically crime and education. We are committed to connecting talented individuals with the resources and training they need to be successful in order to grow the St. Louis region. We invite you, Amazon, to be a part of this positive change.

We know Amazon likes to make an impact on the communities they call "home". St. Louis is exactly the place where your company can be a catalyst for future development throughout the entire region and contribute to the renaissance of a great American city through the infusion of a Midwest (centrally located) headquarters. Together as civic, business and philanthropic leaders, we enthusiastically support bringing Amazon to St. Louis. We cannot wait until you become part of the fabric and history of St. Louis!

I hope that Amazon will consider the Urban League of Metropolitan St. Louis an ally in all of your endeavors. Please feel free to contact me at [mmcmillan@urbanleague-stl.org](mailto:mmcmillan@urbanleague-stl.org) or (314) 615-3662 if I can be of service to you as you make your decision.

Sincerely,  
  
Michael P. McMillan  
President & CEO



Affiliated with the National Urban League

Proud member of



**Michael P. McMillan**  
President/CEO

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## OFFICE OF THE MAYOR



**Emeka Jackson-Hicks**  
Mayor

October 11, 2017

Mark Kern  
St. Clair County Board Chairman  
19 Public Square  
Belleville, IL 62220

Dear Chairman Kern:

I am writing to express my support for the regional efforts to attract Amazon HQ2 to the Metropolitan St. Louis area. If Amazon HQ2 selects the St. Louis and East St. Louis riverfronts as its new home, Amazon would become an active leader and stakeholder in the revitalization of the entire region. Securing this opportunity would benefit the residents of East St. Louis, St. Louis City and County, and St. Clair County, reviving the region and spurring economic development in our community. Amazon's presence in the Metropolitan St. Louis area will create much needed job opportunities and may encourage other major corporations to locate to the Midwest.

The Metropolitan St. Louis area is a prime location for Amazon HQ2 for several reasons. Our region is home to an extensive transportation hub which includes Metro public transportation, four airports, major railways and port access along the Mississippi river. This network will allow Amazon to continue to provide swift delivery of its products and attract diverse job candidates to advance the company's objectives. Our region is also home to a number of accredited universities such as St. Louis University, Washington University and Southern Illinois University which will provide Amazon with a deep pool of job applicants to staff the new facility.

I recognize this is a wonderful opportunity for the City of East St. Louis and the entire region. The outcome will be transformational. The City of East St. Louis is thrilled to be an active partner and support the region's application for Amazon HQ2. I hope you will favorably consider our proposal for Amazon to call our region home.

Sincerely,

  
Emeka Jackson-Hicks  
Mayor

East St. Louis Municipal Building • 301 River Park Drive, 3rd Floor • East St. Louis, Illinois 62201-3022  
Office: (618) 482-6601 • Fax: (618) 482-6629



OFFICE OF THE MAYOR

October 16, 2017

Sheila Sweeney  
Chief Executive Officer  
St. Louis Economic Development Partnership  
7733 Forsyth Boulevard  
Clayton, Missouri 63105

Dear Ms. Sweeney:

The Metro Mayors of St. Louis is an organization of the mayors of cities with a population of 10,000 or more in St. Louis, St. Charles, Franklin, and Jefferson counties. The mission of Metro Mayors is to work in collaboration for the betterment of the St. Louis region. We believe that cooperation is necessary for an attractive, dynamic, and growing region.

The Metropolitan Mayors of St. Louis would like to formally support and add its voice to the efforts to bring the newly proposed headquarters of Amazon to the St. Louis region. We believe that this region has the technical assets, the educated workforce, and the medical, cultural, and sports amenities that make the St. Louis region a desirable location for Amazon and for attracting the human capital necessary for Amazon to operate successfully.

The Metro Mayors organization represents hundreds of thousands of constituents and our cities are the closest government units to our residents. We know our citizens and believe that they are supportive of bringing Amazon to this area.

We look forward to the enormous positive benefits that would arise from this new location of the Amazon headquarters.

Sincerely,

A handwritten signature in cursive script, appearing to read "Gerry Welch".

Gerry Welch  
Mayor, Webster Groves  
President, Metro Mayors of St. Louis

CITY OF WEBSTER GROVES • 4 EAST LOCKWOOD AVENUE • WEBSTER GROVES, MISSOURI 63119 • (314) 963-5307



Mr. Jeff Bezos  
Chief Executive Officer  
Amazon  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

October 10, 2017

Dear Mr. Bezos,

As you and your team explore just where to establish Amazon's second headquarters, no doubt you will have file after file of materials to pore over. So, as part of the contingent hoping you will choose St. Louis, we'll cut to the chase. We in St. Louis — natives and transplants alike — have found that those who come to the Gateway City for college, career or happenstance fall in love with our city.

We, at Washington University School of Medicine and BJC HealthCare, cherish and embrace St. Louis — so much so, in fact, that in the neighborhoods surrounding our medical campus, we have invested millions of dollars toward regenerating the market for private investment in businesses and real estate, and enhancing social service opportunities. Among our investments is our neighbor directly to the east, the progressive and ever-expanding Cortex Innovation Community, a hub of bioscience and technology research and home to some 60 startups, many founded by Washington University faculty and alumni. Next summer, Microsoft Corp. will join the Cortex community when it opens a regional headquarters and Microsoft Technology Center there.

We love it here. St. Louis not only has a burgeoning reputation as a center for innovation and entrepreneurial endeavors, our city is smack dab in the middle of the country, it has an incredibly affordable cost of living, rich housing stock, room to grow practically any which way, tremendous airport capacity, a slew of cultural treasures and an eagerness to make this city the best it can be. St. Louisans have intense pride in this city (have you ever been to a Cardinals' baseball game?) and in the businesses and institutions that choose to invest here. On that note, we'll tell you a little bit about us.

The strength of the affiliation between Washington University School of Medicine and BJC HealthCare, and the commitment we have as partners of excellence, have fueled mutual growth and prosperity, allowing for fundamental and continuous investment in research and teaching eminence — all to the benefit of the health of St. Louis and beyond.

BJC HealthCare operates 15 hospitals, four health service organizations and numerous health-care facilities in Missouri and Illinois, and earns \$5 billion in annual revenues. One of the largest

nonprofit health-care organizations in the United States, BJC includes Barnes-Jewish Hospital and St. Louis Children's Hospital, the primary teaching hospitals for the School of Medicine. Both are consistently ranked as leading hospitals by U.S. News & World Report. In fact, Barnes-Jewish is one of only seven hospitals in the nation to earn honor roll recognition in all 25 years the publication has ranked hospitals.

BJC HealthCare is the largest private employer in Missouri, and the School of Medicine is not far behind. Both have been able to recruit employees from across the region and across the world, bringing rich diversity to our institutions and the St. Louis metropolitan area. Our team members appreciate the quality of life in St. Louis, a place that provides the amenities of much bigger cities, without the commensurate costs and hassles.

With respect to the broader workforce, BJC HealthCare consistently focuses on partnerships that enhance the career aspirations of employees. By engaging with the community to advance education and training to ensure that coming generations of workers have the skills necessary for the future, BJC seeks to be part of the solution in work readiness, paying particular attention to technical and technological preparedness. We also should note that BJC would be pleased to become the second largest private employer in Missouri should Amazon select St. Louis.

Amazon's employees and their families would have access to the highest quality of health-care services in the country through BJC's expansive network of hospitals in eastern and mid-Missouri and southern Illinois. In addition to the adult and pediatric academic hospitals in the heart of St. Louis, BJC has well-respected and recognized community hospitals in suburban St. Louis and St. Charles counties, as well as the southern Illinois cities of Alton, Belleville and Shiloh. Within BJC, Amazon also would find an extensive network of corporate health, employee wellness and well-being, and behavioral health services, as well as access to top-rated BJC Medical Group physicians.

BJC is the largest provider of charity care and financial assistance to patients in this part of the country and takes seriously its mission to "improve the health of the people and communities we serve." Focusing on people, academic and social missions, long-term sustainability and stewardship, BJC takes pride in being among the most stable integrated, health-care delivery organizations in the country. The ongoing partnership with Washington University School of Medicine is a key to BJC's success.

The School of Medicine, one of the most distinguished medical schools in the world, is known for pushing the boundaries of science and medicine to solve the world's most pressing health problems. Its outstanding faculty are international leaders in research education and patient care, and the school maintains one of the most dynamic and robust research enterprises in the world. During the 2016 fiscal year, grants and contracts totaling more than \$548 million supported faculty research efforts. Among U.S. medical schools, our school is ranked No. 5 in research funding from the National Institutes of Health, with particular strengths in cancer, the microbiome, Alzheimer's disease, personalized medicine, genomics, diabetes, cardiovascular disease and infectious diseases.

The School of Medicine has a long and storied history of medical breakthroughs. Our physicians and scientists created the first positron emission tomography (PET) scanner; proposed the now-common practice of taking aspirin to help prevent heart attacks; and helped to pioneer the use of insulin to treat diabetes. Our experts developed screening tests used worldwide to diagnose Alzheimer's disease, and we are a world leader in carrying out Alzheimer's clinical trials, among them an international trial evaluating drugs to prevent cognitive decline in patients who have an inherited predisposition to developing the disease at a young age.

Likewise, Siteman Cancer Center at Barnes-Jewish Hospital and Washington University School of Medicine is ranked among the top cancer-treatment centers by U.S. News & World Report and is a National Cancer Institute-designated Comprehensive Cancer Center, the only cancer center with this designation in Missouri. Siteman is highly regarded in the area of bone marrow transplantation and cellular therapies and is the U.S. leader in the number of patients enrolled in clinical trials for treatment of cancer.

At the forefront of microbiome research internationally, the school has paved the way in understanding the role of microbes in human disease. For example, Washington University scientists and colleagues at the International Centre for Diarrhoeal Disease Research in Bangladesh have begun a clinical trial to evaluate whether new microbiome-targeted therapeutic foods, designed to support healthy development of gut microbial communities, can repair dysfunctional communities in malnourished children and restore healthy growth. Researchers at the school also are breaking new ground in genomics and cancer vaccines, nanoparticles and molecular imaging. Our laboratories have been key to unraveling the mysteries of emerging infections such as Zika virus, and the unsettling, far-reaching quandary of antibiotic resistance.

The medical school recently launched a visionary initiative centered on personalized medicine. By offering possibilities for treatment and prevention based on patients' own genes, personalized medicine is changing the landscape of modern health care. With unparalleled tools and expertise at its disposal, the school is a global leader in this revolution, bringing together resources and intellectual horsepower from every basic and clinical scientific discipline to dramatically and urgently accelerate the timeline for making customized, affordable disease treatment and prevention available within the next decade. The science of aging is also a key focus for our investigators. In the next five to seven years, we expect to see drugs that slow the aging process and help stave off age-related ailments.

Always forward focused, the partnership between the school and BJC HealthCare includes major investments in basic science, informatics and technology, to improve the future of health care and bring even more elite scientists into the fold. Ten basic scientists who are leaders in their respective fields will be recruited to the medical campus over the next few years. The two institutions also are partnering on the newly launched Health Systems Innovation Lab, an effort aimed at developing innovative ways to deliver care and improve health. Cross-disciplinary in nature, the lab aims to bring together clinicians, patients, researchers, public-health experts and private industry to find solutions to problems that prevent patients from receiving optimal care, including investigating how new technology can best be used.



Amazon's new headquarters will need a deep, diverse, talented and dedicated workforce; St. Louis has intellectual capital. Our medical campus generates a remarkable mix of scientists, physicians, other health-care experts and entrepreneurs, and we are not the only higher-ed institution in town. The medical school ranks first in the nation in the entrance-exam scores of its medical students and attracts an exceptional group of residents and fellows as trainees. It has the largest and one of the finest MD/PhD programs in the country. The university's Division of Biology and Biomedical Sciences is a graduate-education consortium of the Schools of Medicine, Engineering, and the College of Arts & Sciences. It is among the oldest and largest programs of its kind, and its interdisciplinary, individualized approach serves as a national model for PhD training programs.

We at Washington University School of Medicine and BJC HealthCare truly embrace St. Louis. We are partners in providing the best health care available, and we are partners with the St. Louis community. Our employees — from world-renowned doctors and scientists to nurses and medical technicians — help make St. Louis a great place to live and work. We would love if you joined us.

Sincerely,



David H. Perlmutter, MD  
Executive Vice Chancellor for Medical Affairs and Dean  
Washington University School of Medicine



Steven H. Lipstein  
Chief Executive Officer  
BJC HealthCare



October 10, 2017

Jeff Bezos  
Chief Executive Officer  
Amazon  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

Dear Mr. Bezos,

The Sisters of Mercy came to St. Louis more than 160 years ago, establishing a health care system that today serves millions of patients across our community and beyond. We are privileged to call St. Louis home and as Amazon explores a second headquarters location, we hope you find a home in St. Louis too. I appreciate the opportunity to share with you some personal perspectives of why I believe Amazon and St. Louis are a good fit.

Health care is an important consideration for Amazon and your employees, and as the CEO of one of our community's leading health care systems, I can attest that you'll find exceptional quality and choice. Mercy serves St. Louis through two acute care hospitals, a heart hospital, cancer center, children's hospital and rehabilitation hospital, as well as three additional hospitals within a 50-mile radius. We also care for the St. Louis community and beyond through the world's first virtual care center, which allows us – via technology – to bring specialty and primary care to patients in hospitals, workplaces, schools and even homes.

Education is another area where St. Louis excels, with more than a dozen colleges, a strong public school system as well as one of the nation's largest private and parochial Catholic school systems.

While steeped in history, St. Louis – like Amazon – is focused on the future. In 2017, we were named the Top City for Millennials by *Business Insider*, which cited our cultural and civic amenities as well as affordable costs of living. St. Louis has garnered an impressive share of similar accolades, particularly as it relates to a culture of entrepreneurial growth, including *Forbes* citing St. Louis as "The Right Way To Build a Tech City," *Popular Mechanics* ranking us as a "top startup city," and *FiveThirtyEight* naming us as the "new startup frontier."

During my nearly two decades in St. Louis, and through service on local boards and participation in civic activities, I've been encouraged and inspired by the community's innovative and caring spirit. As chair of Webster University's Board of Trustees, I know with certainty that our area is training the leaders of tomorrow – perhaps even future Amazon leaders. My wife serves on the boards of St. Louis' leading art institutions and through her involvement I have witnessed how St. Louis is bringing the best in arts and entertainment to the region. My involvement with The United Way of Greater St. Louis has shown me that our community has a big heart and a culture of giving to those in need. It's more than simple Midwestern hospitality – it is part of who we are as St. Louisans.

I also appreciate the opportunity to offer information on some partnership opportunities that may be of particular interest to Amazon. Mercy is a national leader in working directly with employers to offer health care coverage as an option to working through commercial health insurance companies. To date, we've directly contracted with more than 70 employers, including Boeing and Walmart, to offer affordable health plan options that link employees to an expanded network of Mercy hospitals, physicians and other providers and services. We would be honored to partner with Amazon and your employees in support of your health care needs.

ROi, Mercy's supply chain division, has been at the forefront of transforming how supply chain operates within health care since its founding in 2002. Originally serving only Mercy, ROi now supports more than 250 hospitals across the U.S. We are actively engaged in discussions with Amazon to explore how ROi and Amazon might benefit from a relationship. Possibilities include Amazon serving as the digital "store front" for ROi's \$4.4 billion contracting portfolio and the potential of expanding ROi's \$90 million private label product reach via Amazon's distribution network. With more and more care taking place in the patient's home, we believe that a relationship with Amazon may help bridge a future need by matching our virtual care capabilities with your access to and delivery of medical products, pharmaceuticals and other supplies.

Mercy is very excited by the prospect of Amazon calling St. Louis home. Missouri may be the Show Me State, but I hope we have the opportunity to show you why Amazon should choose St. Louis. Please do not hesitate to contact me directly if I can answer any questions or be of assistance.

Sincerely,

A handwritten signature in black ink, appearing to read "Lynn Britton". The signature is fluid and cursive, with a small dot above the 'i' in Britton.

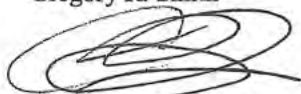
Lynn Britton  
Mercy President and CEO

14528 South Outer Forty  
Chesterfield, MO 63017  
314-628-3411

[Lynn.Britton@Mercy.Net](mailto:Lynn.Britton@Mercy.Net)

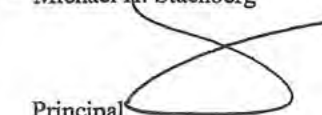


Gregory R. Smith



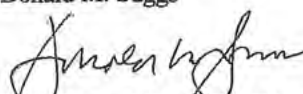
CEO and Managing Partner  
Husch Blackwell LLP

Michael H. Staenberg



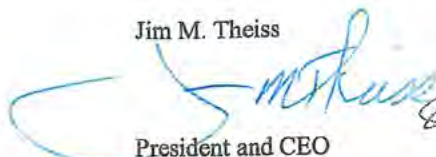
Principal  
The Staenberg Group

Donald M. Suggs



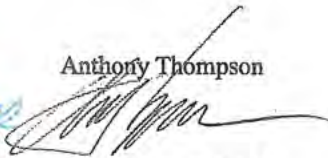
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Jim M. Theiss



President and CEO  
TKC Holdings, Inc.

Anthony Thompson



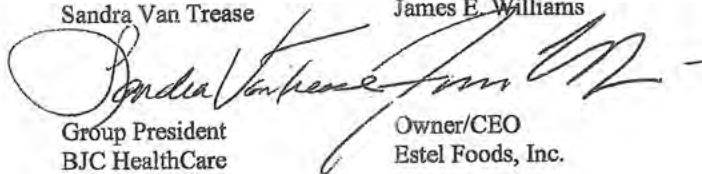
Chairman and CEO  
Kwame Building Group, Inc.

John M. Tracy



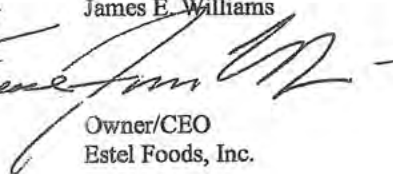
Executive Chairman  
Dot Foods, Inc.

Sandra Van Trease



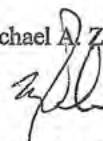
Group President  
BJC HealthCare

James E. Williams



Owner/CEO  
Estel Foods, Inc.

Michael A. Zambrana



President and CEO  
Pangea Group



Jeff Bezos  
Chief Executive Officer  
Amazon  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

Dear Mr. Bezos:

In 1999, when we created Ascension, the largest non-profit health system in the United States and the world's largest Catholic health system, we chose St. Louis as home for our corporate offices. I would like to tell you why Ascension – with 150,000 employees providing care through 2,500 sites in 22 states and Washington, D.C. – continues to be proud to call St. Louis home.

In our fiscal year ended June 30, 2017, Ascension had total operating revenues of \$22.6 billion and total assets of \$34.3 billion, while providing more than \$1.8 billion in care of persons living in poverty and other community benefit programs. From our headquarters in St. Louis, we meet the healthcare needs of millions of Americans every year. Our size and scope give us the ability to influence healthcare policy on the local, state and national level, as we advocate for a compassionate and just society through our actions and our words.

Rooted in our mission of serving all persons, we have a vision to lead the transformation of healthcare, both in the U.S. and internationally. We have found that being based in St. Louis provides us access to high-quality human and infrastructure resources that support us in realizing that vision.

My position gives me a unique perspective on the strengths of this region. I am a board member and past chair of the national Healthcare Leadership Council. In addition, I am a member of the board and the Executive Committee of the St. Louis Regional Chamber, and recently completed a two-year term as board chair of the St. Louis Regional Business Council. In that role I spearheaded efforts to help the region achieve its highest potential, and I believe the addition of Amazon to this community would be a major catalyst to reaching that goal.

Through these appointments, as well as my 18 years as a resident of the St. Louis area, I have come to a deep understanding of the strengths, values and potential of this often-misunderstood region. St. Louisans sometimes downplay their city, but as someone who came to the area from Detroit, I can see clearly the region's benefits and powerful potential.

St. Louis is home to smart, dedicated people with a tremendous Midwestern work ethic and an understanding of the value of community. In many ways, St. Louis is America's biggest small town, where people know and care about one another. With a large number of urban and suburban neighborhoods and communities, residents have access to a tremendous variety of lifestyles, amenities including cultural institutions and parks, as well as top-tier restaurants, shopping and attractions – providing a wonderful quality of life with an affordable cost of living.

These are some of the reasons Ascension continues to call St. Louis home. Another is the availability of talented and highly trained professionals in all disciplines, thanks to a strong collection of local research universities and colleges anchored by nationally ranked Washington University and Saint Louis University.

St. Louis is also a hub of healthcare innovation and strength, with nationally and internationally known medical centers and emerging life sciences companies in areas such as genomics, biotech pharma, as well healthcare providers and insurers. **Scientists in St. Louis are constructing “blueprints” for healthcare advancements with the potential for global impact.** Since 2001, Ascension has operated its own venture capital subsidiary focused on healthcare innovation, now with four funds and more than \$800 million in assets under management. Ascension Ventures provides financial and strategic returns, including key insights into emerging technologies, products and services. Also in St. Louis, our Innovations Accelerator Team and New Virtual Market Development and Incubations group nurture innovative solutions, such as virtual care, with the potential to accelerate the transformation of healthcare.

Our information technology subsidiary, Ascension Information Services, also based in St. Louis, is one of the largest healthcare IT service organizations in North America, with an annual operating budget of more than \$1 billion and a capital budget in excess of \$250 million and ranking No. 33 on the Computerworld Best Places to Work in IT list among large corporations.

Altogether, Ascension has over 1,500 leaders and associates in St. Louis, and I believe it's important for us to give back to the community. Ascension is a partner in Social Venture Partners of St. Louis, a philanthropic effort of the St. Louis Regional Business Council that supports a number of local non-profit organizations with funding as well as with other types of practical support. I'm pleased that Ascension has been able to assist a number of local non-profits that do wonderful work in the St. Louis community. Ascension also is a founding supporter of Your Move Chess, which has launched chess programs for students in the Ferguson-Florissant School District that are making an impact in the lives of young people.

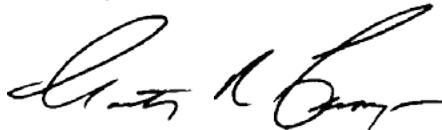


Ascension is proud to be part of ongoing dialogue focused on continued improvement of the quality of life of the region and the development of future leaders. I have been a champion for efforts that help develop leaders in this community – that gives them the tools they need to succeed and thrive as leaders – leaders who stay here in the St. Louis region and continue to use their gifts and talents for the betterment of our whole community.

I believe the St. Louis region offers Amazon an unparalleled mix of strengths and opportunities – strengths that will support the company's continued growth and success, and opportunities to make a tremendous impact in the lives of millions of people, both in this region and beyond. Amazon would support local efforts to attract and retain top talent and serve as an anchor for the continued redevelopment of this vibrant community.

As the United States expanded to become a world leader through westward migration, St. Louis served as the gateway to the west. That spirit continues today as St. Louis is prepared and equipped to support pioneers such as Amazon as you build the world of tomorrow.

Sincerely,

A handwritten signature in black ink, appearing to read 'Anthony R. Tersigni', with a stylized flourish at the end.

Anthony R. Tersigni, EdD, FACHE  
President and Chief Executive Officer



10101 Woodfield Lane  
St. Louis, MO 63132  
**phone:** 314-994-7800  
**fax:** 314-994-7900  
ssmhc.com

October 10, 2017

Dear Amazon Leadership:

We are delighted that you are considering calling St. Louis home. We are proud of our community and the talented, diverse, and dedicated workforce who have provided exceptional health care services across St. Louis for nearly 145 years. In fact, we would like to personally invite you to come tour our facilities and meet with us to learn how we can provide a full continuum of seamlessly integrated healthcare services for your employees and their families, while also lowering the cost of Amazon's healthcare expenses.

SSM Health is a market leader in delivering high-quality care that is personalized, convenient and affordable. By integrating our hospitals, clinics and other sites of care, we are uniquely positioned to provide value-based, quality care to people over the course of their lifetimes. Drawing on this model of care, SSM Health has a **proven track record of working with employers, payers and other partners to find innovative ways to prevent disease and achieve exceptional health outcomes, while also lowering the total cost of care.** In fact, we have contracts with employers and healthcare coalitions outside the region who send their employees to St. Louis for care.

SSM Health's integrated delivery network in St. Louis includes:

- A **nationally-renowned children's hospital**, a leading adult academic medical center (operated in partnership with Saint Louis University School of Medicine), and 6 other community-based acute-care hospitals.
- More than 40 physician offices, 25 SSM Health Express Clinics at Walgreens stores, and 7 urgent care centers, along with fully coordinated in-patient and out-patient behavioral health, rehabilitation, home care and hospice services conveniently distributed throughout the region. In addition, SSM Health offers many patients **24/7 access to care through our network of telehealth services.** This means individuals and families can get the care they need, when and where they need it most.
- SSM Health Medical Group, together with *SLUCare* Physician Group, have **more than 3,000 employed and staff physicians who partner to share best practices, clinical research and expertise**, with the goal of better coordinated patient care in St. Louis. In addition, **SSM Health Medical Group is recognized as a NCQA Patient-Centered Medical Home**, and participates in both an Accountable Care Organization and Clinically Integrated Organization.

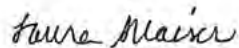
We are one of the largest employers in the region and successfully recruit and hire more than 60 new physicians and nurse practitioners each year. That is because both

Through our exceptional health care services, we reveal the healing presence of God.

SSM Health and the St. Louis community are very attractive to families and professionals. Our cost-of-living is very affordable, and the region has a wide variety of urban and suburban housing options. Our school system offers families a variety of options from highly-rated public and charter schools to numerous private schools. We also have access to a wonderful variety of recreational activities from an extensive park system and competitive sports teams to a vibrant visual and performing arts community.

We would welcome the opportunity to meet with you and are available any time. Come enjoy our city and also learn more about our innovative and lower cost methods to provide exceptional care to your employees.

Sincerely,



Laura S. Kaiser, FACHE  
President/CEO  
SSM Health



Candace Jennings  
President of Hospital Operations  
SSM Health St. Louis



One Metropolitan Square  
211 North Broadway, Suite 1300  
St. Louis, MO 63102

phone 314.231.5555  
fax 314.444.1122  
www.stlregionalchamber.com



October 12, 2017

Jeff Bezos  
Chief Executive Officer Amazon  
c/o Site Manager Golden 2121 7th Avenue  
Seattle, WA 98121

Dear Mr. Bezos:

The St. Louis Regional Chamber and its Board of Directors strongly support the regional response for Amazon's second headquarters. We are pleased Illinois Governor Bruce Rauner and Missouri Governor Eric Greitens have both demonstrated their support for selection of a St. Louis regional site.

Leveraging our authentic regional strengths and seizing opportunities like this will demonstrate the St. Louis area's collaborative spirit. The broad community of leaders developing this response is united for economic prosperity throughout our region, working together to make our community a more attractive place for all people. We are confident our region's central location, competitive cost of doing business, attractive cost of living, along with our skilled, educated and productive workforce, will insure Amazon's long-term success.

We are committed to partnering with our regional stakeholders to provide a compelling business case for Amazon to choose St. Louis as your second North American headquarters. We are excited about the opportunities presented by this decision, which will make a large impact on the St. Louis region and contribute greatly to our economic growth.

Sincerely,

Joe Reagan  
President & CEO  
St. Louis Regional Chamber

Warner Baxter  
Chairman, President & CEO, Ameren  
Chairman, St. Louis Regional Chamber

Suzanne Sitherwood  
President & CEO, Spire  
Board Member, St. Louis Regional Chamber

Danny Ludeman  
President & CEO, Concordance Academy  
Board Member, St. Louis Regional Chamber



Jeff Bezos  
Chief Executive Officer, Amazon  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

Dear Mr. Bezos:

Though we have yet to meet, I am a fellow entrepreneur who opened my business, Build-A-Bear Workshop, in 1997. We both set up to disrupt the retail experience in different ways and in different cities. While the scale of our businesses is different, our businesses thrived in the new economy.

St. Louis has been a terrific place to start, grow and nurture a business. Located in the heart of the country it was easy for us to expand to a broad range of cities—few places were farther away than 3 hrs. by plane and the vast majority of our web shipments would get to our Guests within two days at a very low cost. Our first investor was in St. Louis and the rest were Mid-west based. That was 1997, today there is an even larger innovation community that has nurtured businesses in plant science, technology and health care. CORTEX, T-REX and the Danforth Plant Science have grown to have enormous impact on our region and the world. Soon, the Delmar DiviNe™ will add a similar collaborative, high tech work space for world class nonprofits headquartered in our region as well as affordable living spaces targeted to teachers, nurses, social workers, public health and safety workers. This will be created repurposing an abandoned, historic hospital in the heart of the metro region while maximizing the neighborhood's amazing assets of the area. And this is just a beginning.

Our major universities, Washington University in St. Louis, Saint Louis University and the University of Missouri St. Louis all are great collaborators in science and technology. They attract and graduate great students and provide us with amazing talent. Many of our budding entrepreneurs are graduates of these institutions and they find St. Louis a welcome innovation community for their ideas and talents.

You will receive many proposals and from other great cities but I wanted you to know from a fellow entrepreneur that St. Louis is a special place for growth. We are in the heartland of our country and our community has the heart you need to take Amazon to the next level.

Sincerely,

A handwritten signature in black ink that reads 'Maxine Clark'.

Maxine Clark  
Founder, Build-A-Bear Workshop

130 S. Bemiston Avenue, Suite 303  
St. Louis, MO 63105  
Phone 314.899.5248  
Fax 314.802.7118  
<http://clarkfoxstl.com>



September 30, 2017

CIC St. Louis  
4240 Duncan Avenue  
St. Louis, MO 63110

October 3, 2017

Mr. Jeff Bezos  
Chief Executive Officer  
Amazon  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

Dear Mr. Bezos,

If Amazon really wants to impact a community, St. Louis is ripe for the picking. You've heard all the great economic factors by now, I'm sure--Logistics, Healthcare, Finance, Biotech, Education and more. But to me the real selling point for a creative company like Amazon is the opportunity to transform an entire region. To actually *be* the tipping point for a place that is at a crossroads of staying great or becoming exceptional, seems Amazonian to me.

Grit, drive and innovation are what's making St. Louis one of the fastest growing startup cities in the country. Some of the same things that have made the combination of Amazon and Seattle great are what St. Louis is all about. From Anheuser Busch and Crown Candy Kitchen, to Square and Worldwide Technologies, St. Louis is the home of scrappy entrepreneurs and Fortune 500 companies who are all working together to transform this city into the great place it was meant to be. The people of St. Louis don't quit. They keep reinventing and reshaping their skills to fit the new industries of the region, with a determination and work ethic you have to experience first-hand to fully appreciate.

When you ask the millennials flooding our city why they're here and what they love, they'll tell you it's the Austin or the Seattle of 10 years ago. It's a place they can afford a loft downtown, be an entrepreneur and still have a great quality of life. They see it as a city on the verge of cultural and social justice transformations and a place where *they* can come to make a difference for future generations.

In 2014 Cambridge Innovation Center (CIC) came to St. Louis because we saw something special: Universities ripe to become the economic drivers of new business, a city ready to make the changes needed to foster a re-birth of innovation, and a collaborative spirit we hadn't experienced anywhere else we'd looked. We took a chance and have never looked back. We currently house 270 companies and are adding 40,000 sf in May as our third expansion. Our clients cover a multitude of industries including biotech, IT, life science, manufacturing, and more. The talent being drawn from around the globe is impressive.

Amazon HQ2 has the ability to join forces with a city on the verge of something amazing. I hope you will seriously consider a site visit to experience what we all get to live every day. It's too hard to describe on



paper—you just have to see it for yourself. I would welcome the chance to answer any questions and/or host you at CIC at your convenience. All my best as you continue the search.

Cheers,

A handwritten signature in black ink, appearing to read 'K Plank', with a long horizontal stroke extending to the right.

Kim Plank  
General Manager  
CIC St. Louis  
[plank@cic.us](mailto:plank@cic.us)  
626-346-7453 (c)

*Co-Chair*  
*The Honorable Frank Klipsch*  
*Davenport, IA*

*Co-Chair*  
*The Honorable Lionel Johnson*  
*St. Gabriel, LA*

*Executive Committee*  
*The Honorable Sarah Strommen*  
*Ramsey, MN*

*The Honorable Tim Kabat*  
*La Crosse, WI*

*The Honorable Bob Gallagher*  
*Bettendorf, IA*

*The Honorable Lyda Krewson*  
*St. Louis, MO*

*The Honorable*  
*Emeka Jackson-Hicks*  
*East St. Louis, IL*

*The Honorable Jay Hollowell*  
*Helena-West Helena, AR*

*The Honorable Jim Strickland*  
*Memphis, TN*

*The Honorable Darryl Grennell*  
*Natchez, MS*

*The Honorable Sharon Weston*  
*Broome*  
*Baton Rouge, LA*

## Mississippi River Cities & Towns Initiative

Effort of the Mayors along the River  
**America's Inland Coast 2017**



October 6, 2017

Amazon  
Office of Economic Development  
c/o Site Manager Golden  
Seattle, WA 98121

Dear Site Selection Team:

**It is with great enthusiasm that we support the candidacy of St. Louis, MO to be the site of Amazon's second headquarters (HQ2).**

The Mississippi River Cities & Towns Initiative is an association of 80 cities along America's most important waterway. Generating nearly \$500 billion in annual revenue and directly supporting 1.5 million jobs, the Mississippi River is essential to the U.S. economy; and is one of the largest provider of critical environmental services on the continent.

Like the River itself, our largest Metropolitan Statistical Areas are big and think big. The aggregate gross metropolitan product for the cities along the Mississippi River is almost a half- trillion dollars linking the corridor to the global supply chain through the significant port infrastructure that moves product to and from the rest of the world.

The City of St. Louis is one of the Mississippi River's brightest jewels. This is made possible by the incentives and logistical advantages that are unique to the Mississippi River Valley such as: 1) an ample supply of fresh water delivering almost 80 billion gallons of fresh water to American manufacturing per day; 2) global supply chain positioning giving St. Louis the third busiest port in the nation's inland waterway system; 3) using the River as a connector, a draw, the key to achieving resilience for the region.

St. Louis treats its fresh water resources as an invaluable asset to powering growth. Indeed, environmental services are absolutely pivotal to sustainable economic development and St. Louis has been a leader in this work through such efforts as *Project Clear* and the creation of a sustainability platform for the region that extends beyond the City's boundaries.


Since St. Louis holds a key position in the global supply chain due to its place on the River, freight, connectivity, and access to the intermodal capacity of the nation and the world is key and achieved by regional freight endeavors designed to maximize logistical advantage.

Furthermore, St. Louis has embraced the historical and cultural icon that the Mississippi River is. Turning back toward the waterway, St. Louis has ingeniously refocused on the River as a uniter instead of a divider.

The Mississippi River Valley provides some of the most incredible recreational opportunities in the world. Tourism is the second-largest economy on the Mississippi River generating \$244 billion in annual revenue. St. Louis has worked to bring the River experience into the heart of the city providing for trails, bike paths, and walkability that allows one to walk through the middle of downtown to the water's edge unobstructed.

One last attribute we would note is how the cities of the Mississippi River reinforce each other. If Amazon comes to the Corridor, it will be uniquely supported by a ten-state region of 124 cities linked by one River.

Sincerely submitted,

A handwritten signature in blue ink that reads "Lionel Johnson Jr." The signature is fluid and cursive, with the first and last names being more prominent.

Lionel Johnson  
Mayor of St. Gabriel, LA  
MRCTI Co-Chair

A handwritten signature in blue ink that reads "Colin Wellenkamp". The signature is written in a cursive style with a long, sweeping underline that extends to the right.

Colin Wellenkamp  
Executive Director  
Mississippi River Cities & Towns Initiative





4320 Forest Park Avenue  
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Jeff Bezos  
Chief Executive Officer  
Amazon  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

Mr. Bezos,

I am President and CEO of Cortex, the not-for-profit master developer of the Cortex Innovation Community. I am writing today to tell you that St. Louis is the right location for Amazon's HQ2.

Cortex was launched in 2002 by Washington University in St. Louis, Saint Louis University, University of Missouri-St. Louis, the Missouri Botanical Garden and BJC HealthCare to commercialize regional corporate and academic research.

Now a 200-acre district of over 350 companies and 4,300 employees, Cortex has grown exponentially, attracting west coast tech companies like Square, Uber, Pandora and Microsoft, as well as a presence of our regional Fortune companies: Express Scripts, Centene, Boeing, Nestle-Purina, Emerson and DuPont. We have also established 9 innovation centers and accelerators that combine affordable space with entrepreneurial support resources. As a result of our rapid growth and unique programming, Cortex has been [cited by the Brookings Institute](#) as an international model for urban innovation districts.

Fundamentally, Cortex is an entrepreneurial platform that our established and startup companies can plug into to rapidly accelerate and deliver new technologies to the marketplace. It is an intentionally designed creative community that supports all technologies. Innovation-focused economic development projects like Cortex and Downtown T-REX have strengthened and revitalized St. Louis' urban core by leveraging our nationally-ranked research universities, a low cost of living, strong communities of corporations and small businesses, committed civic leadership, and a cultural infrastructure of parks, museums, restaurant districts, and unique neighborhoods.





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Cortex is one of nearly a hundred [entrepreneur support organizations](#) that accelerate companies, cultivate tech talent, mentor new businesses, promote equity and inclusion, or offer space to startups. Ours is a collaborative ecosystem; St. Louis' tradition of mutual support is the reason the area is beginning to land at the top of national rankings of [fastest-growing startup cities](#). It is the reason tech talent comes to and stays in the region. And it's what HQ2 will have as a platform for future growth and engagement.

We are ready and excited to welcome and partner with Amazon as together we launch the third decade of growing the St. Louis innovation community. Selecting St. Louis as the location for HQ2 gives Amazon the opportunity to play a major role in the revitalization of a beautiful, historic city that is centered in the heartland of our country.

Sincerely,

A handwritten signature in black ink, appearing to read "Dennis Lower". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Dennis Lower

President & CEO, Cortex Innovation Community





October 6, 2017

Mr. Jeff Bezos  
Chief Executive Officer  
Amazon  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

Dear Mr. Bezos:

I am enthusiastic about writing this letter of support for the St. Louis region's efforts to attract Amazon to locate its second headquarters in our great city. I am positive that the St. Louis region offers the perfect location, community, and support for your remarkable company's expansion strategy.

As the President and Executive Director of the Technology Entrepreneur Center, (otherwise known as T-REX), I see every day how the 200 technology-focused startup companies that we are incubating here in our facility are finding success, opportunities, and talent to ensure their own companies' successes. St. Louis is a tech-focused region, with an unparalleled density of world-class universities that graduate thousands of developers, engineers, and logistics experts annually. The region is home to Scott Air Force Base, the logistics headquarters for the U.S. Air Force; the National Geospatial Agency's western headquarters; World Wide Technology--the largest African- American owned company in the U.S.; and hundreds of technology-focused companies that are a product of the presence of these high-tech organizations and the region's great universities. We have also become an attractor for thousands of entrepreneurs, working on a wide variety of innovations in areas such as artificial intelligence, logistics, drone technologies, geospatial intelligence, financial technology and cybersecurity.

The T-REX Innovation Center, located in downtown St. Louis, is a great example of the expanding innovative and entrepreneurial spirit in the region. Our Innovation and Acceleration Center is focused on helping tech companies grow. And our organization is only one of several strong innovation communities situated in the St. Louis region.

The innovation ecosystem is very strong in St. Louis because of our region's great community, strong universities, (such as Washington University and Saint Louis University), and the exceptional talent that can be found throughout the St. Louis area. The St. Louis region has been recognized nationally and internationally for our strong innovation community. In fact, just last week, Popular Mechanics called out St. Louis (again) as one of the best places in the country to start an innovative new company.

As an extraordinarily successful disrupter in the traditional business space, I am certain that Amazon leadership recognizes the significance and opportunities associated with being part of an overall

#### **T-REX Innovation Center**

**200+** Current Client Companies  
**400+** Members  
**3,452** Total Jobs Created  
**\$187 Million** Annual Labor Income  
**\$350.4 Million** Annual Economic Output  
**\$101 Million** Raised by T-REX companies in 2016

314.241.7500  
DOWNTOWNTREX.COM  
911 WASHINGTON AVE -SUITE 500  
ST. LOUIS, MO 63101





community that is focused on innovation and on developing and retaining talent to ensure the long-term success of both large and small ground-breaking companies. *That is St. Louis.* Combine that drive with our region's midwestern kindness and community-minded approach, and you have the context for great opportunity and great success.

Prior to my current role, I headed research at Saint Louis University. When the University had faculty openings, national and international searches were conducted. New faculty who joined the University often stated that they had no intention of staying in St. Louis--that their new faculty roles with the University in St. Louis were only a step in their career journeys. Invariably, however, almost all the faculty we hired into these faculty appointments fell in love with St. Louis, with its wonderful neighborhoods, beautiful architecture, incredible restaurants, fantastic schools, and low cost of living. They said St. Louis is the best place to raise a family, a great location to access the beautiful outdoor spaces that cover Missouri and Illinois, and a community where people can make strong, long-lasting connections. As with any community, we work constantly to make ourselves even better, but we are honest about both our opportunities and the work we want to accomplish.

We would be honored to have Amazon as part of our community, and would welcome you with open arms. At T-REX we would be honored to work with Amazon on technology initiatives and talent development needs.

I am certain that Amazon would **never** regret choosing St. Louis as a home.

With much gratitude for your consideration,

*Patty Hagen*

Patricia Hagen, PhD  
President/Executive Director  
Technology Entrepreneur Center, Inc./T-REX

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October 10, 2017

To whom it may concern,

As someone who has had an operations headquarters in St Louis for the last 24 years, I have been asked to give my personal assessment & support for locating Amazon's second headquarters in the St Louis area.

For Panera Bread, St. Louis has been a good & nurturing environment from our beginning & continuing to the present day, thus helping to facilitate our growth.

The consistent support we received from the St. Louis consumer & a loyal pool of employees & staff played an important role in the foundation of our early success.

That support, coupled with the region's extremely favorable cost of living structure, made an easy choice of maintaining our operations headquarters in St Louis.

Here are a few good examples of benefits that the region has to offer:

- relatively low payroll costs which helped us maintain our costs
- high quality and loyal workforce
- great highway system
- excellent airport capacity & access
- ample & affordable housing
- access to higher education, offered by many of the local universities
- low cost of energy
- lower cost of gasoline
- the central location has made St. Louis an ideal place for one of our two headquarters

The welcoming business climate and culture was accessible & noticeable to us from day one. The breadth and scope of this business friendly environment facilitated our expansion from a single bakery/café in 1987 to a network of more than 2,000 bakery/cafes throughout the country.

I whole-heartedly support & recommend that Amazon locate its second Headquarters in the St. Louis area.

Sincerely yours,

A handwritten signature in black ink, appearing to read "Ron Shaich", is written over a horizontal line.

Ron Shaich  
Founder, Chairman & CEO

Three Charles River Place, 63 Kendrick Street, Needham, Massachusetts 02494 | phone: 781.449.4862 | fax: 781.449.6078