

RETAIL ENTREPRENEURIAL OPPORTUNITIES: FINAL THREE LAND USE SCENARIOS

This section explores a local and small business development and tenanting strategies and provides additional detail for a development strategy targeting small and local businesses. Case studies provide additional context for how the strategy could manifest in similar neighborhood conditions.

Considering the market opportunity to support additional food and beverage (F&B) retailers and the racial makeup of North County, Black-owned restaurants are likely the most opportune category to meet unmet demand in the community. However, restaurants are one of the most capital-intensive and risky businesses in the retail industry.

Potentially a destination dining strategy can align entrepreneurial endeavors with the ability to capture a geographically expansive audience. Particularly because there remains a challenge in attracting customers from dense neighborhoods further west. But to ensure sales potential, the scenario selected should provide a breadth of customers on-site to overcome the lack of residential density nearby.

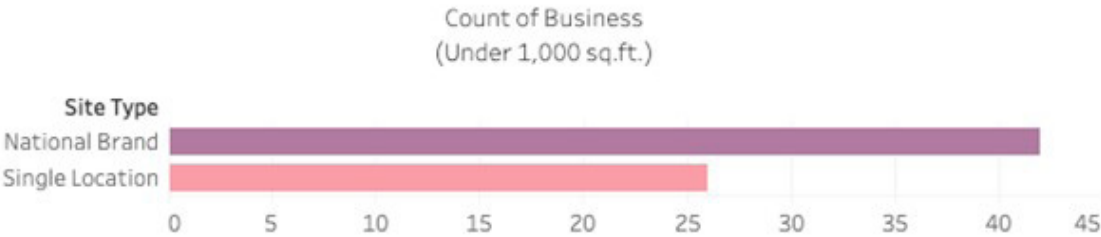
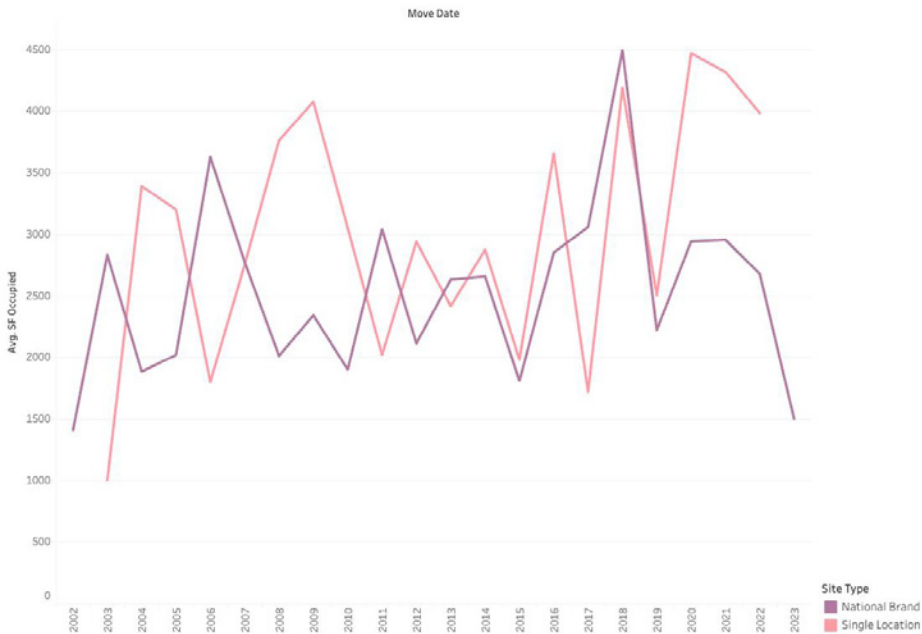
The physical design of retail development matters, as independent businesses without an established customer base must win over new customers. Siting the retail space adjacent to essential community amenities (such as playgrounds, amphitheaters, and dog parks) can promote additional market opportunities. Identify a ladder of vending opportunities can provide more retail space at a lower cost for the entrepreneur and aligned programming could support revenue generation for all businesses on-site and a desirable neighborhood for the residential and office population. (e.g., farmers' market and food trucks for special event days, brick-and-mortar, kitchen incubator, etc.)

Food & Beverage Establishment Square Footage Leased

Analysis conducted by the larger consulting revealed that smaller spaces were largely occupied across North County. Building upon this finding and the food and beverage strategy outlined in the previous memorandum, the &Access team analyzed national and local food and beverage tenants' average occupancy across the region.

The chart to the right demonstrates that leases executed by national and local businesses were comparable in average size. Single location food and beverage businesses across the region occupied approximately 500 square feet more space than national brands (3,217 and 2,702, respectively). This finding further illustrates the demand for smaller spaces. Our team assumes national brands are likely able to demonstrate space efficiencies through honed prototypical designs while single location businesses occupy spaces available.

It remains undetermined if tenants would readily occupy micro spaces (less than 1,000 square feet), if more were available. Data demonstrates that businesses (both national brands and single location businesses) occupy spaces smaller than 1,000 square feet (see chart below). As such, it will be a sound investment for a development team to explore a range of small retail space square footages that are attractive to both national and local businesses.



Local Retailers & Restaurateurs Strategy: Jamestown Green Estates

The on-site residential population provides for an immediate customer to collocated retailers and can help to guarantee a portion of the revenue required for operations.

Pair development with programming to bring people on-site. Consider aligning development with the specific brand of the development – a focus on solar energy and/or agriculture. Focus on agriculture will have more opportunities for tenant alignment, for example:

- Full-service restaurant with an on-site small-scale farm to source produced for menu items
- Alcoholic beverage manufacturer such as a brewery or distillery
- Seasonal farmers market
- Small scale grocer with locally sourced goods
- Open space for recreation

Case Study: Civano New Town

This 270-acre New Urbanist neighborhood with adjacent 55-acre “town center” is co-located in Tucson, AZ. The Town Center includes an activity center/meeting hall, live/work residences, light industrial manufacturing buildings, medical office, complex, and a gas station. Retail on-site includes:

There are 650 high-efficiency homes, many with carriage homes. Thirty-five percent (35%) of the space is open with a mix of natural desert, landscaped parks, sport fields, community gardens, and paths and trails.

The tenant mix showcases the limited ability to support retail in edge conditions like Jamestown Mall.



Civano Tenant Mix

- Food & Beverage: Our Sweet Lil' Cakery
- Shopping: The Drizzy Lizard Gift Shop
- Salons: Painless Permanent Makeup & Prayer, Path to Wellness Massage, Bella Body
- Professional Office: Al Nichols Engineering Incs, Civano Eyecare, Bridge Group

More at: <https://www.terrain.org/2019/unsprawl/civano/>



Local Retailers & Restaurateurs Strategy: Jamestown Village

Ensure retailers offer goods and services aligned with the 15-hour user base:

- Coffee, sundries, etc. for morning
- Quick bite food and drink businesses for lunch and dinner meal periods
- A full-service restaurants for dinner service
- Limited shopping and fitness

Consider developing neighborhood amenities (e.g., parks, public space, community centers) adjacent to storefronts and ensuring they are open to the larger community to ensure local businesses can be exposed to incidental customers.

Identify a ladder of vending opportunities to provide more retail space at a lower cost and align programming (e.g., farmers' market and food trucks for special event days, brick-and-mortar, kitchen incubator, etc.).

Explore the opportunity to offer emerging businesses partnership opportunities with corporate office tenants for catering.

Case Study: Serenbe, GA

Located in Fulton County, GA (in Metro Atlanta), Serenbe is a community that's intended to connect people to nature and to each other. Each of Serenbe's hamlets have complementary commercial centers focused on the elements of a well-lived life: arts for inspiration, agriculture for nourishment, health for wellbeing, play for a joy-filled life, and education for awareness.

Fresh food is another of Serenbe's natural assets, with a 25-acre organic farm, seasonal Saturday Farmer's Market, thriving CSA program and edible landscaping, including blueberry bushes along paths and sidewalks.

Year-round cultural events include outdoor performances from Terminus Modern Ballet, regional theatre, film series, culinary workshops and festivals, music events, and lectures, boutique shopping, art galleries, wellness services and trail riding, plus visiting artists in residence with classes, dinners and talks.

Serenbe offers a more robust tenant mix that aligns with a greater density on-site in comparison to Civano. The diversity of users at Serenby and its brand as a destination contribute to a range of revenue producing opportunities for its businesses. The businesses align with the brand of the development project, creating a unique opportunity that attracts customers time and time again. Note, this mix is more than what is recommended on-site, as Serenbe offers a hotel, educational facilities, and other attractions.

Source: Serenbe's website (<https://www.serenbe.com/>)



Serenbe Tenant mix:

- Arts: Art Farm, Chatt Hills Gallery, Paint Space
- Education: Acton at Serenby, Biophilic Institute. Camp Serenbe
- Food & Beverage: Bamboo Juices, Blue Eyed Daisy Bakeshop, The Farmhouse, Halsa, The Hill
- Grocery + Sundries: General Store, The Wine Shop at Serenbe, Serenbe Farms (CSA Program + Small Scale Farm)
- Lodging: The Inn at Serenbe, Portal
- Shopping: The Ballog, Forage & Flower Botanical Design Studio, Pro Bike Repair, Resource, Hamlin, Hills & Hamlets Bookshop, Honeycomb Consignment, SustainAble Home Goods, Typo Market
- Salons: Chai Vegan Spa & Salon, Creek Retreat, Proper Hair Salon, Spa at Serenbe
- Gym/Fitness: Egoscue of Atlanta, Gym & Indoor Cycling Studio, The Stables at Serenbe, Studio 13 Pilates, Serenbe Swim Club, Serenbe Trail Riding, Serenbe Yoga + Bodyworks
- Professional Office: Serenbe Real Estate, Center for Positive Change, Chiropractic at Serenbe, Collier Animal Hospital, Dental Wellness at Serenbe, Essential Wellness 360, Flourish Pediatrics, Land Plus Associates, Nygren Placemaking, Planning & Design, Precision Performance & Physical Therapy, Serenbe Development



Local Retailers & Restaurateurs Strategy: Agriculture And Energy Technology Annex

Pair annex development with programming to bring people on-site. Consider aligning development with the specific brand of the development – a focus on solar energy and/or agriculture. Focus on agriculture will have more opportunities for tenant alignment, for example:

- Alcoholic beverage manufacturer (e.g., brewery/distillery)
- Farmers' market
- Farm-to-table full-service restaurant

Case Study: Comus Inn, Dickerson, MD

Offering unequaled panoramic views, sweeping landscapes and historic charm, the Inn is located on 5.26 stunning acres at the base of Sugarloaf Mountain in Montgomery County, Maryland. With sprawling park-like grounds, The Comus Inn provides ample exploration and play opportunities for adults and children alike.

Promising accessible farm-to-table cuisine, The Comus Inn has welcomed Chef Sammy D as its Culinary Director. Featuring a world-class chef led restaurant, a craft beer garden, and a unique marketplace, all of our food & beverage offerings are created with a focus on a local approach. While our hope is that you always enjoy your time with us, our true goal is that you also leave The Comus Inn with fun memories of spending time with family & friends.

Although the density surrounding Comus Inn site is less than what is planned as the Agricultural and Energy Technology Annex, we recommend a similar tenant mix to contribute to serve neighborhood and on-site users food and beverage needs. Pairing a restaurant and alcoholic beverage manufacturing facility with a stellar public space will encourage visitors to return routinely.

Tenant Mix:

- Full-service restaurant
- Craft beer garden
- Unique marketplace

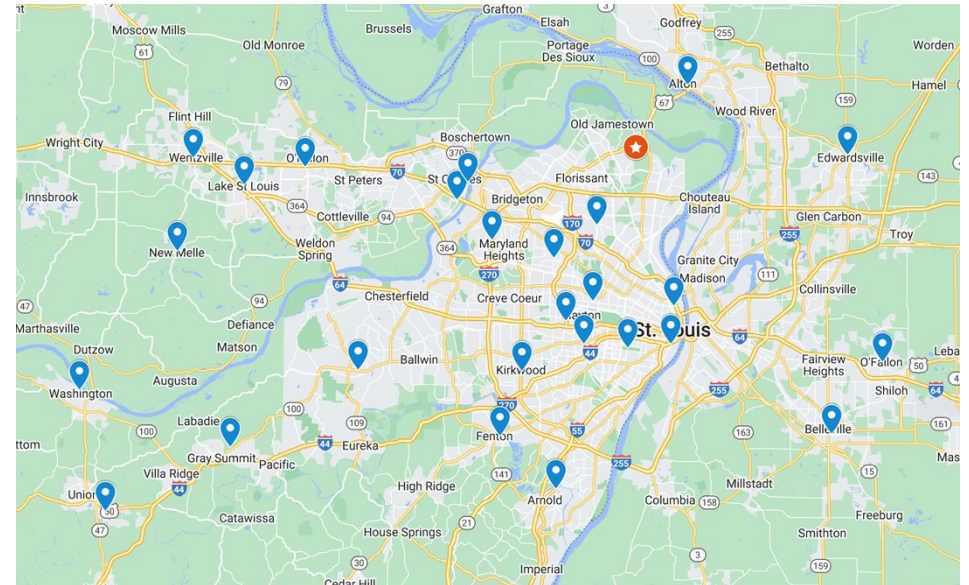
Source: <https://www.thecomusinn.com/>



Gap in North County Farmers' Markets

According to desk research conducted by the &Access team, there is a gap in farmers' markets offered north of I-70 in North County (see map this page – Jamestown Mall site identified by a red star icon). A farmers' market can complement the range of grocery stores located in nearby neighborhoods and our team recommends a farmers' market with both fresh produce purveyors and artisans to provide sales opportunities for small businesses interested in the local North County market. (Source: &Access; *St. Louis Magazine*, *St. Louis Sprout's Farmers' Market Guide*)

To facilitate this opportunity, consider both a permanent structure to provide shade and limit the need for the vendors to provide tents (left image below) or use uniform tenants to allow for vendors table merchandising strategy to speak for their brands and products (right image below).



Local Retailers & Restaurateurs Strategy: Conclusions

Small businesses, especially those in the food and beverage category, can serve a unique value add to the Jamestown Mall redevelopment regardless of typology. Food unifies communities across the globe and could do so for the North County residents. Access holds its recommendation to provide a range of opportunities for local businesses through vendor, mobile, and brick-and-mortar retailing.

Notably, there is a unique opportunity to produce and sale food and/or beverages on-site, a branding opportunity to attract customers from across the region. However, there are zoning implications of commercial sales of food produced on site and strategies for municipalities to take to facilitate this activity from temporary farm stands and community gardens to farm stands. Ensuring by-right establishment of these type of opportunities will help developers create projects as vibrant as Serenbe, Comus Inn, and Civano.

Regardless of the scenario pursued, our team recommends aligning retail along Lindbergh Blvd and, secondarily, Old Jamestown Road to capture the most sales opportunities. This recommendation conflicts with a couple of the above case studies' site, as retail is internal to the properties – a new urbanist approach to development.

Part 3: Section 6

UTILITY AND ROADWAY

The planning team reached out to the various utilities and agencies that impact the Jamestown Mall site for initial responses for the six potential land use scenarios.

UTILITY RESPONSES:

1. THE METROPOLITAN ST. LOUIS SEWER DISTRICT

Email Response From Mr. Eugene Johnson, P.E. (5/4/2022) States:

“Sanitary and Storm sewers’ are available within the Jamestown mall property. The site drains into the Coldwater Pump Station (06F4-059S). During the plan review and permitting process, the additional sanitary flows will be calculated, and the pump station will have to be analyzed with the additional flow to determine if the pumps will have to be upgraded and/or the 24-hour emergency storage increased. If pump station improvements are necessary, they will be considered part of the development and paid for by the developer.”

2. THE MISSOURI AMERICAN WATER COMPANY

Email Response from Mr. Matthew Lueders (6/2/2022) States:

“The former Jamestown Mall property is bordered by a 20-inch main along Lindbergh at Old Jamestown Road on the northwest corner of the property. The typical service pressure is between 95-psi and 110-psi. The mains in the surrounding area are distribution mains targeting residential services and residential fire flow rates. There is a 6-inch and 8-inch main to the west of Jamestown mall and a 12-inch main to the east at the termination of our distribution network.

Regarding capacity, we can provide adequate flow for each of the proposed development types from the 20-inch main which is well connected to our North WTP. Once more is known about the potential development, we can discuss specifics for layout, typical demands, and available fire flow rates.”

3. SPIRE ENERGY:

Email Response from Mr. Nick Eggert (5/9/2022) States:

“Following the demo of the mall and the abandonment of our facilities within the area, we’ll have 8” Intermediate Pressure mains along both Old Jamestown Rd and Lindbergh Blvd that should have sufficient capacity for the potential developments. Mike Langan would oversee small commercial developments, Pat Bloomfield would oversee large commercial developments, and CG Covey would oversee any residential.”

4. AMEREN:

Email Response from Mr. Zak Kaller, Career Engineer, Gateway Division (5/10/2022) States:

“Any of the new developments listed would require the relocation of Ameren facilities on the north side of the Jamestown Mall property. Ameren underground facilities are in easement and the relocation costs would be reimbursable.

In addition, All line extensions will be made according to the rules in effect and approved by the Missouri Public Service Commission per Ameren Missouri’s rate filing at the time of the service extension. Cost estimates for providing the requested service which may include an amount the developer must pay prior to construction, will be determined upon confirmation of the specific project requirements.”

5. AT&T:

Email Response from Ms. Tonya Wells (5/10/2022) States:

“AT&T has copper cables that currently feed Jamestown Mall. There are no fiber optic lines in the old mall property. there are fiber optic cables along Lindbergh that can be brought into the Jamestown area based on what development option is decided. There are some manholes along the perimeter of the old mall. Our infrastructure will need to be reinforced and upgraded with fiber after demolition. I can issue a project to remove the old copper cable from the existing building if that is needed soon.”

6. CHARTER / SPECTRUM:

Email Response from Mr. Kerin Miller, MBA, MA (5/16/2022) States:

“We are in good shape to serve almost anything in this area. While we don’t have any service on the grounds right now, but we serve the surrounding homes and are able to service this site’s future development.”

RESPONSES REGARDING ROAD CAPACITY:

1. MODOT

Email Response from Mr. Van Gluzman – Area Traffic Engineer, (5/5/2022) States:

“Currently there are two operating signals in front of the property: Old Jamestown and Robins Mill. The other two entrances, currently unsignalized, used to be signalized as late as 10 years ago. current roadway infrastructure could be adequate. The existing signal at Robbins Mill dates to 1994 and the one at Old Jamestown Is not that much newer and would likely need replacement.”

2. ST. LOUIS COUNTY DEPARTMENT OF TRANSPORTATION:

Email Response from Mr. Glenn Henninger, Assistant Division Manager, Planning & Programming, Division of Project Development (6/2/2022) States:

“Existing road network supported the Mall in its hay-day. We do not anticipate the need for major roadway network upgrades. However, when uses are pinned down more, a traffic study will determine locations of possible needed spot improvements.

The immediate area has also grown in residential use. Multi-modal improvements to the area roadway network should be considered, but major widening such as addition of thru driving lanes is not anticipated.”

3. BLACK-JACK FIRE DISTRICT:

Email Response from Ms. Demetria Peebles (6/1/2022) indicates that Fire Chief Corbin is on Vacation and will Respond upon his return the week of 6/6/2022.