



RETAIL SALES IMBALANCES and FISCAL IMPLICATIONS

St. Louis County, Missouri





February 2-4, 2017 • St. Louis, Missouri

Robert M. Lewis, FAICP, CEcD **DEVELOPMENT** STRATEGIES

The Municipalities

Retail Purchasing Power vs. Captured Sales

3 Leakers and Gainers

4 "A" and "B" Cities

5 The Evolved Imbalances: Why Some A's Should be B's and Vice Versa

Where are We?



Metro Counties



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Metro Counties Populations, 2015









L The Municipalities

Z Retail Purchasing Power vs. Captured Sales

> **B** Leakers and Gainers

> > **4** A" and "B" Cities"

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Cities with more sales than buying power

Cities with less sales than buying power Includes unincorporated areas



33 (37%)

57 (63%)

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Population with more sales than buying power

390,200 (39%)

Population with less sales than buying power Includes unincorporated areas 611,600 (61%)



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Biggest Retail Sales Gainers and Losers (\$millions)

St. Louis County (net gain)

\$4,632 million



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Cities by population rank (of 89) \$(1,500)\$(1,000) \$(500) \$-\$1,000 \$1,500 \$500 Creve Coeur (12th) \$1,001 Fenton (42nd) \$707 Florissant (1st) \$650 Chesterfield (2nd) \$561 Richmond Heights (27th) \$510 Bridgeton (18th) \$501 \$(763) Wildwood (4th) \$(377) University City (3rd) Webster Groves (9th) \$(260) Clayton (13th) \$(181) Town and Country (19th) \$(154) Ladue (24th) \$(114)

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4 *"A" Cities and "B" Cities*

The Evolved Imbalances: Why Some A's Should be B's and Vice Versa

Point-of-Sale vs. Pool Cities: Established 1977



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Point-of-Sale vs. Pool Cities: Established 1977



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Point-of-Sale vs. Pool Cities



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Point-of-Sale vs. Pool Cities





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Point-of-Sale vs. Pool Cities: Net Gainers and Losers

Number of Cities (including unincorporated area)



Point-of-Sale vs. Pool Cities: Net Gainers and Losers

Population (including unincorporated area)



Point-of-Sale vs. Pool Cities: Above and Below Per Capita

Cities Above and Below Per Capita Sales (including unincorporated area)



Point-of-Sale vs. Pool Cities: Above and Below Per Capita

Populations Above and Below Per Capita Sales (including unincorporated area)



CONCLUSIONS1. Sales taxes vital to most local governments.

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- 5. There are still 89 cities plus unincorporated.
- 6. Time for a new "sharing" system?

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