



Community Snapshot

DEMOGRAPHICS

DEVELOPMENT INFLUENCES

LAND USE

ECONOMIC DEVELOPMENT

TRANSPORTATION

COMMUNITY FACILITIES

Why It Matters

The composition of a community's population determines the amount and type of housing it needs, the buying power of the population determines the amount of retail development the community can support, and the education levels of a community's population will influence the types of businesses that may be attracted to the area. Also, if the economy of an area is changing, then understanding how those changes may affect the local community will enable it to plan for, and benefit from, those changes.

INTRODUCTION

A "snapshot" of the city was prepared to establish a foundation of facts about the City of Warrenton during this planning process. It documents important trends and issues that impact the City's overall quality of life and ability to serve its residents. The full report can be viewed on the City website.

This Framework includes a summary of those findings including:

- Demographics
- Development Influences
- Land Use & Zoning
- Economic Development
- Transportation
- Community Facilities

The Snapshot, and this summary, is not meant to be an exhaustive inventory; rather, it focuses on data that will help inform the overall Comprehensive Plan, and highlights important trends, key issues, and opportunities that may need to be considered to make good decisions for the future.

DEMOGRAPHICS (PEOPLE, HOUSING & EMPLOYMENT)

Demographic Trends

Population and Households

Warrenton's population and households increased by more than 47% in the decade from 2000 to 2010. The national economic recession that started in 2008 has dramatically slowed population growth. Over the past five years, growth has averaged 0.8% per year compared to an average of 4.7% over the previous decade. Over the last 15 years, Warrenton's population has increased as a percentage of Warren County's population, an indication that Warrenton is attracting growth to the county.

Although the number of single-person households has increased over the past 15 years, family households still account for 65% of all households in Warrenton. Individuals living alone represent approximately 29% of the city's households, whereas more than 26% of households accommodate four or more persons.

Household Income

Warrenton households have modest incomes that are slightly lower than those of Warren County and Missouri. The average household income in Warrenton is just below \$54,000, while the average incomes in Warren County and Missouri are just over \$63,000. However, the median in all three geographies are more closely aligned. Warrenton's median household income of about \$47,800 compares to \$46,500 for the state and \$48,900 for Warren County. The percentage of households with incomes below \$25,000 is higher and the percentage with incomes over \$100,000 is lower in Warrenton than in the state and county.

Age Groups

During the 2000–2010 decade, persons aged 25 to 44 decreased by 2% as a percentage of the overall population, but persons aged 55 to 64 increased by 4%. This means that many of the households moving into the area during the decade consisted of persons in their late forties and early fifties. Assuming a continuation of this trend, within the next 10 to 15 years Warrenton will experience a significant increase in the number of persons and the percentage of the population over the age of 70. This aging population is balanced by the large percentage of young families and the more than 30% of the population that is aged 19 or younger.

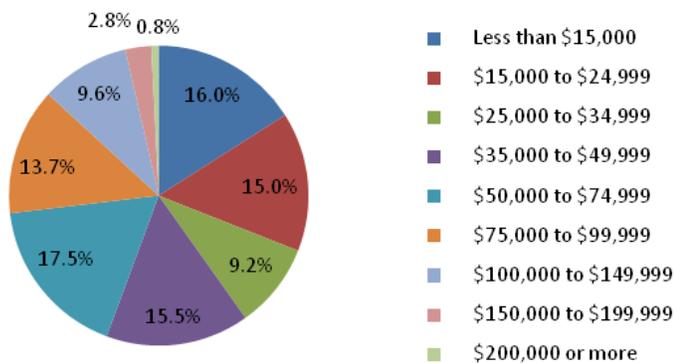
Although persons aged 65 and older represent less than 14% of Warrenton’s population, they comprise more than 40% of the persons with ambulatory and self-care limitations living in the community.

Educational Attainment

A high school diploma is generally considered a basic level of educational attainment in the United States. Persons who do not have a high school diploma generally have greater difficulty finding employment than persons who have graduated from high school or have an equivalent level of education. In Warrenton, approximately 38 percent of the residents have at least a high school education. **However, more than 17% of the population has less than a high school education; approximately 12% dropped out of high school. This compares to 11% of persons in Missouri who do not have a high school education.**

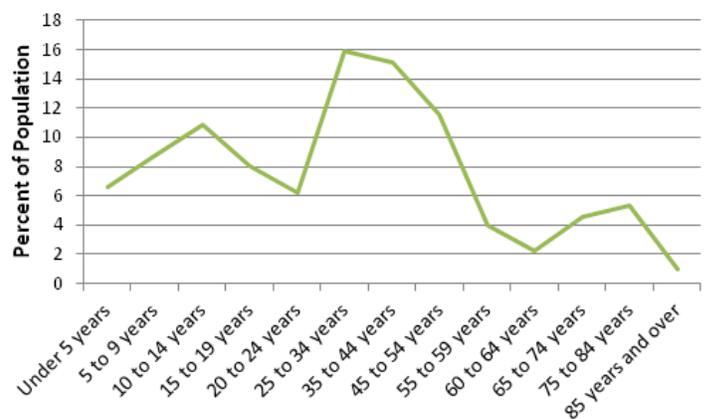
Though a high school education is frequently considered a basic requirement by employers, a college degree is now required for many jobs. Warrenton, with about 16.5% of its population having at least a college degree, lags behind the State of Missouri, where almost 28% of the population has a bachelors or graduate degree.

Household Income Distribution



Source: U.S. Census - American Community Survey Annual Averages 2009-2013

Population by Age Group



Source: U.S. Census - American Community Survey Annual Averages 2009-2013

Future Projections

Although the pace of growth is likely to slow, Warrenton can continue to expect to attract new population over the next 15 years. The Division of Budget and Planning for the State of Missouri's Office of Administration prepares the State's official population projections for each county in the state. Although this agency projects that some rural counties will lose population over the next 15 years, many counties with urban areas are projected to experience steady growth.

Warren County has benefited from the westward expansion of the St. Louis metropolitan area. Even though St. Louis County is losing population, St. Charles County is growing rapidly. Extrapolating from the State's projected population growth for Warren County, Warrenton can anticipate a population of 9,000 by 2020 and about 11,000 by 2030. This is an average annual growth rate of about 2.3% compared to 4.7% during the first decade of the century. However, the average annual growth rate of less than one percent over the past five years has caused some individuals county and regional agencies to be more pessimistic about the prospects of future growth.

Table: Population & Households

	2000	2010	2015 est	% Change 2000 - 2010	% Change 2010 - 2015
WARRENTON					
Population	5,281	7,780	8,104	47.3%	4.2%
Households	1,985	2,927	3,054	47.5%	4.3%
Families	1,363	1,969	2,024	44.5%	2.8%
WARREN COUNTY					
Population	24,525	32,513	33,160	32.6%	2.0%
Households	9,185	12,339	12,633	34.3%	2.4%
Families	6,888	9,013	9,209	30.9%	2.2%

Source: U. S. Census - American Community Survey Annual Averages 2009-2013



Source: City of Warrenton

Housing

Warrenton has a comparatively new and modest housings stock. The city has approximately 3,100 units, approximately 38 percent of which were built since 2000. The American Community Survey estimates the median value of the owner-occupied homes to be about \$132,000. With an estimated vacancy rate of 5% to 7%, supply and demand appear to be well balanced.

Types of Structures

The housing stock in Warrenton is dominated by single-family homes, as is common in small communities; more than three-fourths of the housing units are single-family houses. Only 1.6% of the units are in structures with 10 or more units; county-wide, 1.4% of housing units are in structures of this size. As in the rest of Warren County, mobile homes account for more than 10 percent of the housing units in Warrenton. Mobile homes constitute 11.3% of Warrenton’s housing units, compared to 13.2% county-wide.

Tenure

Home ownership in Warrenton is comparatively low for a small community. In Warren County, 79.4% of the occupied housing units are owner-occupied; this compares to 68.7% in Warrenton. Though many of the community’s renters are housed in the multi-unit structures and mobile homes, 150 to 200 are also likely to be renting single-family homes.

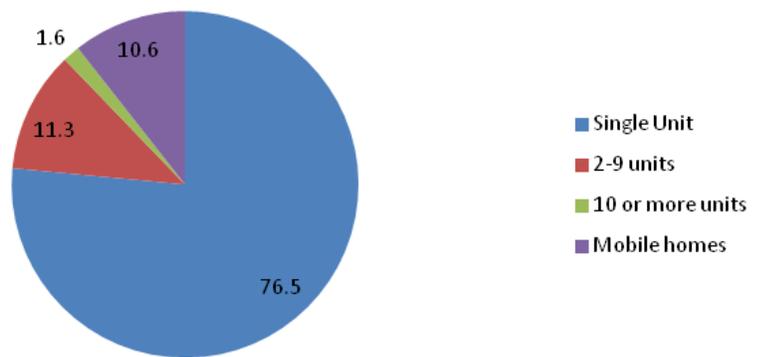
Age of Housing

Although there is some diversity in the housing in Warrenton, most of this is concentrated in a few blocks around the city’s traditional main street commercial and civic center. The comparative newness of the housing stock in Warrenton has resulted in a predominance of similar ranch-style houses throughout large sections of the community. Only slightly more than 7% of Warrenton’s housing units were built prior to 1950, and more than half the city’s housing has been constructed since 1990.

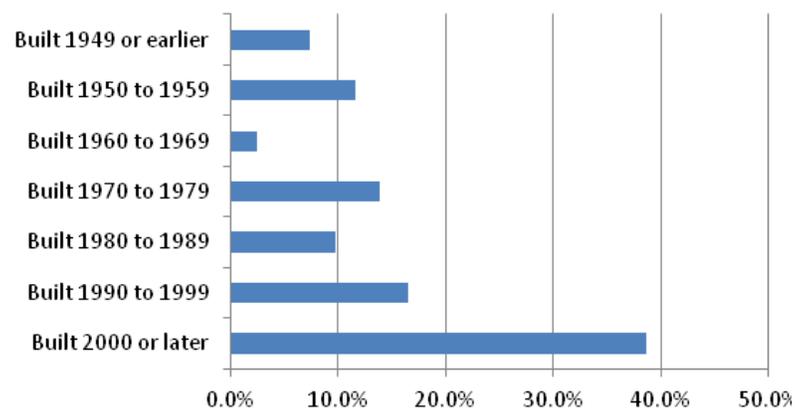
Looking Forward

Recent builders have begun to introduce new forms of housing to Warrenton, including some attached townhouses. As Warrenton grows, it will need to continue this trend to have housing that appeals to a diverse range of home buyers and renters. The future housing developments will need to be more architecturally diverse and contain a slightly larger mix of multi-unit structures. Younger persons in the workforce are more inclined to rent than to purchase and the percentage of single-person households continues to increase, both nationally and locally. Warrenton will need more housing to accommodate new workers both single-person households and young couples.

Percentage of Housing Units by Type of Structure



Age Of Housing Stock



Source: U.S. Census - American Community Survey Annual Averages 2009-2013

Employment

Economic development is the base of community development. The size and character of a community's economic base impacts the financial well-being of the community and its residents. It influences all aspects of community life and the level of services that the community can provide its residents.

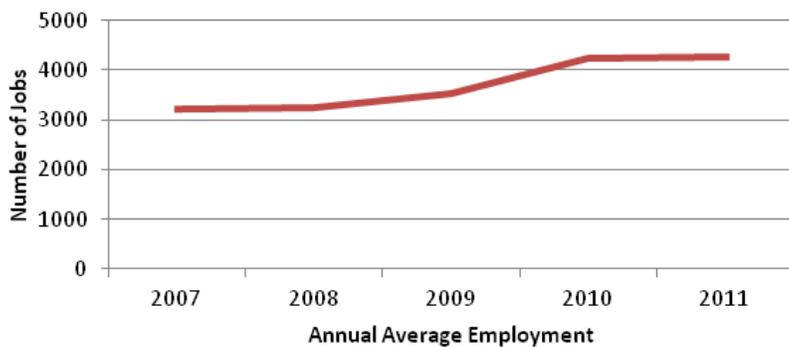
Economic Base

From an economic development perspective, Warrenton and Truesdale must be considered together. During the most recent recession, employment dropped in Warren County and unemployment spiked. Unemployment also increased among Warrenton residents, but the Warrenton economy weathered the recession reasonably well. Employment trends in Warrenton ran counter to county and national trends, and the number of jobs in Warrenton/Truesdale actually increased each year from 2007 through 2011. However, many more individuals joined the workforce than could be accommodated by the few new jobs, resulting in the jump in unemployment.

Employment

Persons living in Truesdale augment Warrenton's workforce by about 10%, to approximately 3,800 workers. However, there are more than 4,300 jobs within the corporate boundaries of Warrenton and Truesdale. The two communities are thus a labor-importing area. However, almost two-thirds of the community's residents work outside of the immediate area; about 40% of Warrenton's resident workforce travel 30 minutes or more to get to work.

Local Employment Warrenton/Truesdale



Source: U.S. Census - "OnTheMap" Bureau of Labor Statistics

About 45% of the jobs in the Warrenton-Truesdale area are in retail trade or manufacturing, but only 21% of the area's resident workers are employed in these industries.

Diversity and Dynamics

Warrenton's economy is dominated by three industries: retail trade, manufacturing, and health care.

All three benefit significantly from the access provided by the I-70 interchange. Retail trade, in particular, focuses around the interchange and is dependent on the visibility as well as the access this interchange provides. It also depends on this access to attract workers. Only about half the retail jobs in Warrenton are filled by local residents. The retail base is far larger than can be supported only by the population of the Warrenton-Truesdale area, and it is

dependent on the accessibility provided by I-70, which draws shoppers from a broad region. Much of the retail development was spurred by the region's rapid growth during the early 2000s and the anticipation of continued growth. However, the 2008–2009 recession dramatically slowed growth and left the local market temporarily overbuilt.

Although health care is a major employer in many communities, it can play a significant role in Warrenton's economy, largely due to the access I-70 provides, which allows the local medical institutions to serve a broad region. Health care is also an industry in which it is important for the workforce to live comparatively close to their place of work. Thus, the almost one-fourth of the resident workforce who works in the health care industry is approximately equivalent to the number of health care jobs in the local economy.

In Warrenton, the number of residents employed in manufacturing is equal to about 75% of the manufacturing jobs in the community. Therefore, the manufacturing firms located in Warrenton-Truesdale

must draw workers from the larger region. Manufacturing firms depend on proximity to the highway for receiving shipments of raw materials and for distribution of their finished products, but the firms also benefit from the highway to draw the workers they need.

The fact that the number of jobs in Warrenton exceeds the size of the workforce is a positive factor for the community. However, the large percentage of local residents who leave the area indicates potential for diversifying the local economy to enable residents to work close to where they live.

Challenges and Opportunities

Warrenton is located just beyond the western edge of the St. Louis metropolitan area. Its land that is available for development is limited. When trying to attract economic activity, Warrenton must compete with several large industrial and business parks with hundreds of acres of vacant, prepared land that also have excellent interstate highway access and are closer to the St. Louis airport.

Projected population growth for both Warrenton and Warren County will create the potential for attracting new economic activity. As the county seat, Warrenton has the potential to increase employment in both public administration and professional services to serve the expanding county population. Additional local population also increases the potential for an expansion of retail activity, and Warrenton's proximity to manufacturing plants in neighboring communities enhances its potential for attracting supply-chain firms for those industries.



Source: City of Warrenton

Table: Employment

Industry	% of total jobs	% of resident workforce
Retail Trade	22.7%	11.8%
Manufacturing	22.4%	19.1%
Educational Services, Health Care and Social Services	19.1%	24.5%
Accommodation and Food Services and arts and entertainment	9.2%	10.6%
Public Administration	6.8%	3.7%
Transportation and Warehousing and Utilities	8.3%	5.3%
Finance, Insurance and Real Estate	4.2%	4.6%
Professional, Technical, Management and Administrative, Waste Management and Remediation	3.0%	6.2%
Other Services (excluding Public Administration)	2.4%	3.6%
Wholesale Trade	2.1%	1.3%
Construction	2.0%	5.2%
Information	0.8%	3.2%
Mining, Quarrying, and Oil and Gas Extraction and Agriculture and Forestry,	0.2%	0.7%

Source: U.S. Census - "OnTheMap" Bureau of Labor Statistics

All sources are statistical estimates based on surveys. The accuracy is affected by the sample size. The actual numbers have plus/minus margin of error that varies depending on sample size. However, by using the same sources over time and across geographies, one can rely on the general trends and the comparison of magnitudes from one geography to another.

Why It Matters

The City of Warrenton and surrounding environs has a variety of environmental and natural resources. The goal for evaluation of those resources is to identify those places that are most important to retain, develop protection strategies to maintain a balance between preservation and promotion of quality growth and development, define opportunity corridors, and define high quality open space set-asides. These natural and environmental features form the basis for the Development Influences Framework. These systems were mapped and overlaid to understand their relationship and their impact to development.

DEVELOPMENT INFLUENCES

Warrenton Environmental Constraints

Not all lands surrounding and within the City of Warrenton are suitable for development due to environmental constraints and valuable natural resources. This framework identified factors that affect development potential of land.

A weighted overlay analysis of environmental factors are overlaid to create a gradient of sensitivity from least to most sensitive (McHarg, 1969). This analysis is used to help the City evaluate “where” they can grow and “where” opportunities exist for the preserve and integration of natural resources to protect ecosystem services and landscape functions such as water quality, groundwater recharge, biodiversity, and productive habitat.

The resource systems that were evaluated include:

- Hydrology: Streams, stream buffers, wetlands, location of alluvium (where water is underneath the surface), and floodplains.
- Existing Vegetation: Forest, scrub, and agriculture.
- Slopes: Slopes greater than 15% were considered as a sensitive resource.
- Land Use: Including parks and public open spaces.
- Soils: Using the soils information from Missouri Department of Natural Resources (MDNR) & (NRCS-USDA). (soils classified by how well they drain).

Developable Land Map

The Developable Land map serves as the initial development envelope for the growth of Warrenton. The protection of the natural drainageways and forested land will:

- Help protect water quality and reduce flooding,
- Allow maximum area for Best Management Practices (BMP) retrofit of the urban drainage system,
- Provide visual buffers and slope stabilization consistent with the current visual character of the City,
- Provide connections for trails, animal and plant species that will help assure that the unique, irreplaceable qualities of the area remain,
- Provide for quality recreational areas near urban areas,
- Provide high quality natural settings for new residential development, and
- Provide more than ample developable land for future development.

Warrenton Findings

Almost 50%, or 2,664 acres, of the Warrenton area is in potentially sensitive areas which encroach on the east, west and south of the city. To the north of the city, there is an opening where development could take place without encroaching on these areas. The center of the city south of the Interstate where development has already occurred does not contain sensitive areas. Based on parcel data, there may be significant opportunities for development in the center of the city north of the Interstate.

Ideally any development that encroached into sensitive areas could become an opportunity for conservation type development to control stormwater with green infrastructure. A host of site level design strategies exist for this type of development.

Conversely, over 50% of the city's land area is developable. Of the total 5,369 acres within the City of Warrenton, less the development constraints of 2,664 acres, 2,704 acres are potentially suitable for future development to some degree.

Warrenton has a significant amount of developable land. Outward growth of the City to the south is becoming constrained due to steep slopes and state land, yet there are vacant lands located north of the Interstate to the east and west that can be developed if utilities and urban services are extended.

Factors such as natural drainage ways, hillsides, and availability of services, has resulted in a "leapfrog" pattern of development on many closer-in parcels. Over time, interest in infill development on those unused tracts will likely begin to increase as outward growth opportunities become more limited, because of their closer-in locations and proximity to existing infrastructure and services.

Unincorporated Area Findings

For the unincorporated area surrounding Warrenton, the percentage of sensitive areas increases to 63%, or 14,410 acres. This area captures much of the large swath of forest to the south of Warrenton as well as the large patch of forest and stream corridor to the northwest of the city. To the east and north of the city at the larger scale there are areas where development could occur in pockets in the upland area on the fringe of wooded stream corridors.

Conversely, approximately 37% of the surrounding unincorporated land area is developable. There are more than 22,834 acres of land at the community's perimeter. After accounting for these constraints, approximately 8,424 acres are potentially suitable for future development to some degree. This is land area that may not have access to utilities.



Lost Creek

LAND USE

Why It Matters

Land use planning is a central component of the comprehensive planning process and helps establish and clarify the community's vision for future development. Land use serves as a framework to guide future development decisions made by elected officials. An understanding of how planned uses compare with how the land is being used, the actual conditions on the ground, helps to determine the development pattern within the community. Often, the actual uses vary from existing zoning and plan recommendations.

Existing Land Use

Slow physical expansion following the 1990's. After adding two square miles of land through the 80's and 90's, the rate of physical expansion for the city slowed. Annexation since the last Plan update added only 409 acres. There are approximately 8 square miles, or 4,855 acres, of land within the City.

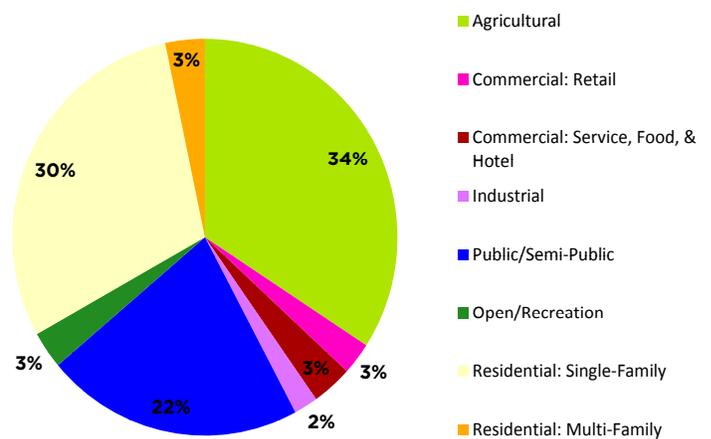
Agricultural/Large Lot Land Use

Agricultural/Large Lot land is one of two "predominate" land uses. All land annexed is designated Agricultural Reserve (AG-1). The total acreages of agricultural land will decreased over time as the city continues to develop. Representing 34% of the total land area, they have reduced from 1,939 acres in 1999 to 1,659 acres in 2015.

Residential Land Use

Residential land is also a "predominate" land use. Comprising 33% of the total developed land in Warrenton. Total acres devoted to residential uses have risen from 1,581 acres in 1999 to 1,608 acres in 2015, an increase of 27 acres. This growth has occurred in new subdivisions located along the southern and northern edges of Warrenton, and some residential infill in older neighborhoods. Multi-family will become an increasing segment of the residential land use. New multi-family complexes have been built throughout the community, resulting in a positive trend toward retaining young people and families. There are two manufactured home parks located north of I-70.

CITY OF WARRENTON EXISTING LAND USE



Source: Warrenton GIS & Vireo

Table: Comparative Land Use 1978 - 2015

Category	1978		1999		2015		Change Acres
	Acres	Percent	Acres	Percent	Acres	Percent	
Residential	470	15	1581	34	1,608	33	+27
Commercial	80	3	527	12	293	6	-234
Industrial	30	5	322	7	98	2	-224
Recreational	86	22	28	1	148	3	+120
Public/Semi Pub.	50	2	127	3	1,050	22	+923
Agricultural/Undeveloped	2430	53	1939	43	1,659	34	-280
Total	3146		4446		4855		+409
	5 sq. miles		7 sq. miles		7.59 sq. miles		

Source: Warrenton GIS, Comprehensive Plan, and Vireo.

Public/Semi-Public Land Use

22% of the land is devoted to public facilities. Public/Semi-public uses include county facilities, institutions, public schools, and the Armory. They have risen from 127 acres in 1999 to 1,050 acres in 2015, an increase of 923 acres. This can be predominately attributed to annexation of the Child Evangelism Fellowship International Headquarters.

Commercial Land Use

Although diminished, I-70 will continue to be a major determinate of commercial development. Land being used for commercial purposes is targeted at four nodes and decreased from 527 acres in 1999 to 293 acres in 2015, representing 6% of the total land area. The greatest “mix” of uses occurs in the Downtown. The dominate use is commercial/retail, with public/semi public uses, smaller offices, and industrial at the edges making this area one of the more diverse areas of the city.

Recreational Land Use

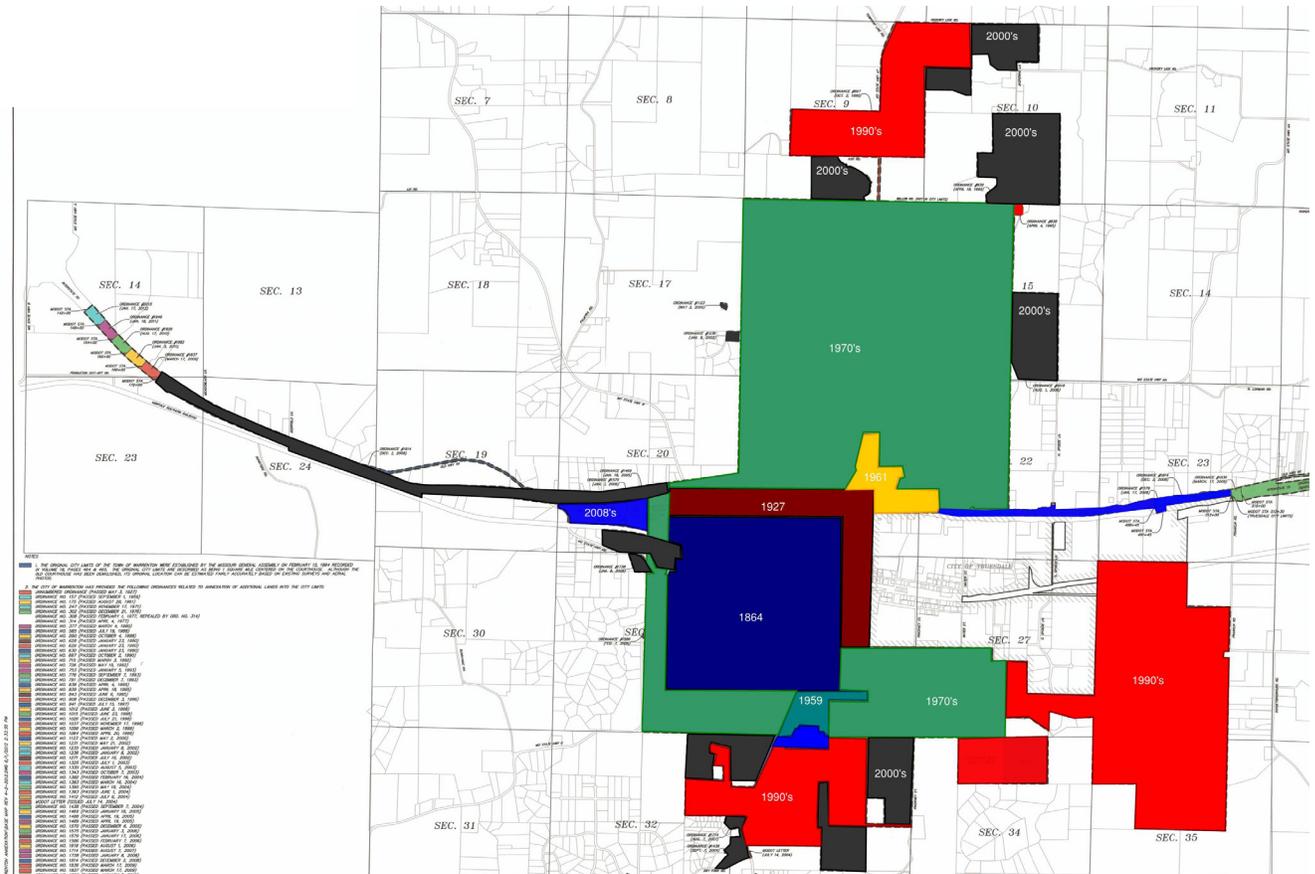
Parks are a source of pride. They are located generally throughout the community, representing 3% of the total land area, or 148 acres, including both City and County lands.

Industrial Land Use

The most significant reason for the City’s relatively low percentage of industrial land is Industrial uses in the adjacent community of Truesdale. In 1999, industrial land uses included 322 acres and in 2015, 98 acres, or 2% of the total land area.

Annexation History by Decade Map (2015)

Figure: 2



Zoning

What is Zoning?

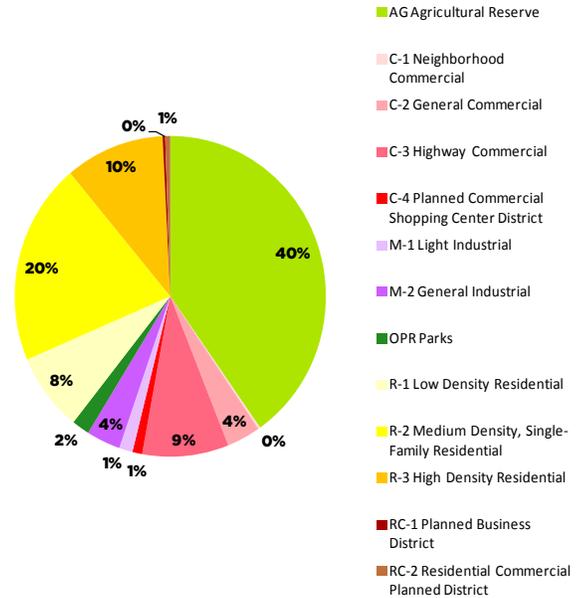
Zoning helps implement land use plans by regulating exactly where uses are allowed on specific parcels of land and how they can be developed in terms of placement on the lot, height, density, access, parking, signage, setbacks and other design requirements.

Existing Zoning

40% of the area is zoned Agricultural Reserve. Not all lands are available for development, such as the Child Evangelism Fellowship International Headquarters, many large lot residential properties, Binkley Woods Park, and the High School.

- 38% of the area is zoned for residential uses, including single-family and multi-family uses.
- Only 15% of the City is zoned commercial/business district.
- Existing zoning in the City is not always consistent with existing land uses.

CITY OF WARRENTON EXISTING ZONING



Source: Warrenton GIS

Table: Comparative Zoning 1999 - 2015

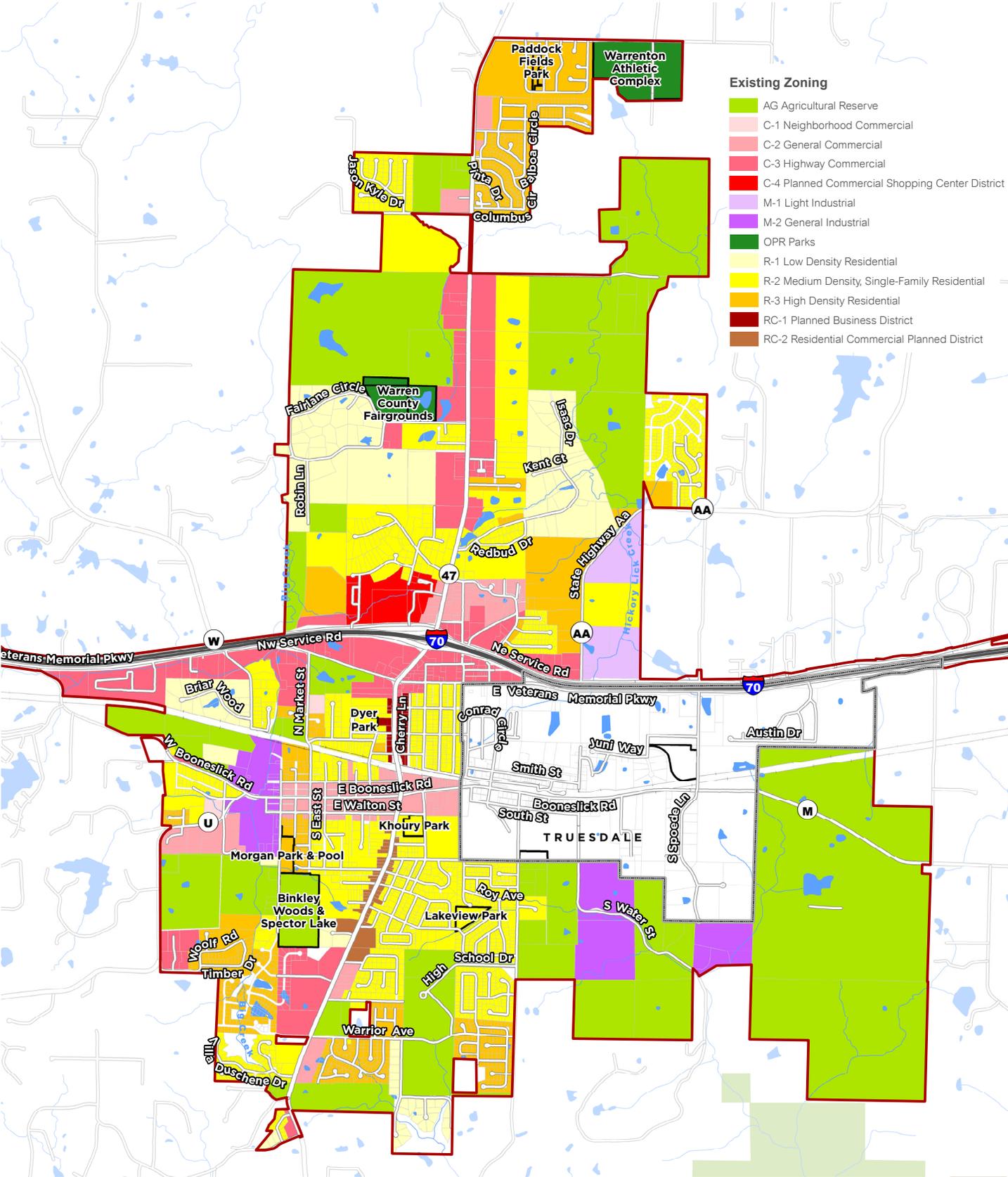
Zoning Category	1999		2015		Change Acres
	Acres	% of Total	Acres	% of Total	
OPR Parks*	-	-	89	2	+89
AG -1	1939	44	1939	40	0
R-1	333	7	380	8	+47
R-2	893	20	980	20	+87
R-3	380	9	497	10	+117
R-4/RC1	14	0.31	13	0.27	-1
R-5/RC-2	40	.89	25	1	-15
C-1	0	0	10	0.21	+10
C-2	148	3	168	4	+20
C-3	320	7	432	9	+112
C-4	58	1	49	1	-9
M-1	88	2	67	1	-21
M-2	233	5	170	4	-63
Total		100		100	

Source: Warrenton GIS

* OPR Parks added in 2010.

Existing Generalized Zoning Map (2015)

Figure: 4



Why It Matters

When discussing economic development potential for Warrenton, it is necessary to discuss the Warrenton/Truesdale area as one economic unit. The hotels and restaurants in Warrenton serve the residents and business in Truesdale. The Local Chevrolet dealer is essentially a Warrenton business even though it may be physically located in Truesdale. The 700 residents of Truesdale shop in Warrenton stores and residents work in the factories located in Truesdale. Thus, in the following discussion the area is treated as a unit, most of the retail space is physically located in Warrenton but over half of the industrial space is in Truesdale.

ECONOMIC DEVELOPMENT

Retail Market Analysis

Warrenton is estimated as having about 550,000 to 600,000 sq ft of occupied retail space. This does not include the approximately 230,000 sq ft of available space in the Outlet Center. Assuming average sales of \$300 per sq ft, this amount of space would support \$165 to \$180 million in retail sales. According to the Missouri Economic Research and Information Center (MERIC), taxable retail sales in Warren County in 2014 totaled just under \$237 million. Actual sales in Warren County are thus approximately 71% of the estimated potential and Warrenton is estimated to be capturing approximately 76% of all retail sales in the county and 54% of the estimated retail sales potential.

MERIC has prepared another retail “pull” index based on taxable sales in 2010 and statewide average household expenditures. This index measures actual sales to estimated potential sales within a county. If the “pull” factor is greater than one, it indicates that the county is pulling retail sales from adjacent counties or that its residents spend more on average than other households in the state. Conversely, if the pull factor is less than one, it is an indication that households spend less than average or that county residents are leaving the county to shop. In this analysis, St. Louis County had a pull rating of 1.35 and St. Charles County had a pull rating of 1.16. Warren County had a 0.54 pull factor.

Because Warrenton is the largest city in the county and is centrally located with excellent access, it is not surprising that most of the retail sales in the county are made in Warrenton. However, it is also understandable that Warrenton is capturing only a little over half of the county’s retail sales based on expenditure potential. Much of the county’s population resides between Warrenton and the St. Charles County line and is able to travel to Wentzville almost as easily as Warrenton. Wentzville is almost three times as large as Warrenton and thus has attracted a greater concentration of retail shops and services. In addition, with over 40% of Warren County’s resident workforce commuting out of the county (primarily to St. Charles and St. Louis counties) to work, there are numerous opportunities for those persons to spend their retail dollars outside of Warrenton.

Walmart is the dominant retailer in Warrenton, accounting for an estimated 20% of the occupied retail space and a quarter to a third of retail sales dollars. Because Walmart is dominant across multiple retail categories, there is little room for smaller merchants. An assessment of the retail mix in Warrenton indicates that the city has a more than adequate supply of grocery stores, restaurants, drug stores, and automobile service stations. The city has a new car dealership and several firms selling used cars and/or auto parts.

As with many smaller communities the gaps are in apparel and home furnishings. Walmart dominates the value-oriented segment of the local apparel market. This also happens to be the largest segment of the local market. Specialty clothing stores carrying quality fashion and business apparel typically need much larger markets to be successful. The same is true for furniture and home furnishings stores. Because they sell items that many households purchase only two or three times over several decades, they need a very large population to succeed.

Projected Need

Using a population growth forecast of 1% per year gives the City of Warrenton a population of approximately 10,000 by 2035 and a population for Warren County of 40,500. This would be an increase of 7,400 persons over the current population. Keeping sales figures in 2015 dollars and assuming the same \$300 per sq ft sales volume, this additional population would support another 250,000 sq ft of retail space.

Table: Warrenton & Warren County Retail Market

	2014
WARRENTON & WARREN COUNTY RETAIL MARKET	
Number of Households in Warren County (est)	12,650
Average Retail expenditures per household*	\$26,500
Potential retail sales	\$335,225,000
2014 Taxable Sales Revenue	\$237,000,000
Estimated sales in Warrenton	\$180,000,000

*Based on Bureau of Labor Statistics consumer expenditure surveys for the Midwest. Sources: Missouri Economic Research and Information Center; U.S. Department of Labor; Applied Real Estate Analysis Inc.

To put this in perspective, it is only a few thousand square feet more than Warrenton currently has available at the Outlet Center.

However, not all of the new sales potential would remain in the county. Assuming that the capture rate remains about the same as it is today, only about 177,000 sq ft would actually be needed in Warren County. Warrenton could expect to capture about 80% of that amount, or about 140,000 to 145,000 sq ft.

Even though there are no specific gaps in the local retail market that could be filled as part of an economic development campaign, Warrenton will continue to attract individual merchants in the restaurant, convenience, and service areas currently filled by existing retailers. Some of these merchants will merely be meeting the demand created by new households. Others will be trying to distinguish themselves with variations on the types of merchandise being offered or novel approaches to merchandising.

The existing vacant retail space in the Outlet Center does not preclude new retail space being built over the next 20 years. However, the amount of new space needed will likely be added incrementally in small retail strips and free-standing buildings.

Office Market

Brokers in the St. Louis Metropolitan Area track more than 78 million sq ft of office space. Approximately 30.5% of this space is in St. Louis City (28% in the Central Business District) and most of the other space is spread across St. Louis County. The North County submarket contains about 13% of the total. The North County office buildings tend to cluster along I-70 and, as new development spread west, a separate submarket in St. Charles County ultimately evolved. However, St. Charles County still accounts for only about 5% of the office space in the metropolitan market, and this space is concentrated in the eastern half of the county.

Warrenton is completely outside of the market for corporate office space. Demand for office space Warrenton comes from local professional service firms; including real estate agents, lawyers, medical professionals and accountants. This demand is currently met by storefronts in retail strips, converted residential structures and owner-occupied free-standing buildings. There are only two buildings designed for speculative office space. One of these buildings is on Boonslick Road across the street from the County Courthouse. A current advertisement on LoopNet indicates that more than 25% of this space is available for lease. The other property at the intersection of Route 47 and Old US 40 appears to be largely vacant. As the population of Warren County increases, there will be small increases in demand for office space as well. The current market for a speculative office building would require a developer who was able to design a building to meet the space and location needs of existing office space users who are currently scattered throughout the city that may not quite be meeting their needs.

Industrial Market Analysis

The assessment of Warrenton’s employment indicated that manufacturing and retail trade were the two leading employment sectors. This concentration of manufacturing employment is reflected in the location quotient analysis prepared by MERIC. A location quotient measures the concentration of local employment compared to the nation. Missouri has a location quotient of 1.07 for manufacturing indicating that there is a greater concentration of employment in the manufacturing sector in Missouri than in the nation as a whole. Warren County’s location quotient for manufacturing is over 2.5. This compares to St. Charles and St. Louis counties where the location quotient for manufacturing is less than one.

Table: Additional Retail Space Needs

ADDITIONAL RETAIL SPACE NEEDS	Projections for 2030
Warren County Population (projected)	40,500
Increase over current population	7,400
Per capita retail expenditures	\$10,100
Incremental Retail Sales potential	74,740,000
Supportable square feet (@\$300 per square foot)	249,133
At 71% capture rate	53,065,400
Supportable square feet (@\$300 per square foot)	176,885
Warrenton potential (80% of total sales within county)	42,452,320
Supportable square feet (@\$300 per square foot)	141,508

Sources: Missouri Office of Administration, Missouri economic Research and Information Center; Applied Real Estate Analysis, Inc.

AREA estimates that the Warrenton/Truesdale area has about 1.2 million sq ft of industrial space. There is an additional 200,000 sq ft of space about three miles east of Warrenton on Old Route 40 at South Strack Church Road. Companies engaged in manufacturing apparently occupy quite a bit of this space but it also houses a variety of companies engaged in miscellaneous services, wholesaling and other enterprises. Most of these companies are small and many are locally owned.

As with the office market, the St. Louis regional industrial does not yet extend into Warren County. As shown in the following table, a about 28% of industrial space within the St. Louis region located in the I-70 corridor and another 15% is actually located in Illinois where I-70 and I-55 provide access to both Chicago and Indianapolis. Going west, the I-70 connects with Columbia and Kansas City. Much of the space in this corridor is devoted to warehouse and distribution space. Not only is industrial space located in this area between the airport and St. Charles County but there is still a substantial amount of vacant land in this area. Earth City alone has enough land available for development to add about half again as much space as currently exist there.

Warrenton will eventually benefit from its location along I-70 as land values in St. Louis and St. Charles counties increase. Smaller firms that want access to I-70 but are also looking for more affordable sites will eventually be attracted to Warren County. As Warren County begins attracting attention, it will not be without competition. Wright City has an established industrial park and appears to have 50 or more acres still available for future development.

Future Needs

Projecting the demand for industrial space is not as straightforward as projecting the demand for retail space. There are many more variables at play and public incentives frequently count in the mix. It is unlikely that CertainTeed would have located in Jonesburg without substantial incentives from the State of Missouri. Generally firm attracted to Warrenton will be firms similar to the ones already located there; small manufacturing and service firms. They will include:

- St. Louis area industrial space user seeking lower-cost location for doing business
- Firms who have had a site recommended by local acquaintances
- New firms formed by local residents

New business formations can be a key factor in driving economic development. However, within the local area, Warren County had fewer new business formations in 2013 than Franklin and Lincoln counties, while there was substantial new business activity in St. Charles County.

Communities try to be prepared to take advantage of economic development opportunities by having land available with infrastructure and regulations in place to facilitate development. Typically, industrial structures only cover 30% to 35% of the land in contemporary industrially zoned areas. The remainder of the land is used for circulation, parking, storage and landscaping. While larger companies may need substantial acreage to develop a facility, many smaller industrial users need only 10,000 to 50,000 sq ft of building. They therefore would need only 1 to 3 acres per business. Even if we assume an average of 5 acres per business, 20 new businesses, could be accommodated on 100 acres. At 35% ground coverage, 100 acres could accommodate about 1.5 million sq ft of industrial space, or about the same amount as already exist in the Warrenton area. Based on current growth projections for the county, 100 acres of industrial land should be sufficient to meet Warrenton's needs through 2030 and beyond.

TRANSPORTATION

Why It Matters

Effective transportation systems are central to maintenance of the health, productivity, and safety of communities. The adequacy of a community's major street system has a tremendous impact on mobility, accessibility, safety, and quality-of-life needs. Safe and efficient facilities are vital to most daily activities and require regular maintenance and upgrading both to meet the demands of a growing population and to be sensitive to environmental resources. The quality and availability of transportation services influence the type, timing, and density of development in the future

Thoroughfares and Roadway Network

Roadway System: What do we have?

Warrenton is primarily a car-dependent city similar to other out-lying communities along the I-70 Corridor. The land use pattern within Warrenton is accessible primarily by car. Warrenton has a number of major arterials or high-volume routes and a set of collector routes that feed into the network. A majority of the local street network (outside the historic grid pattern in the central city) has been developed in a typical suburban pattern.

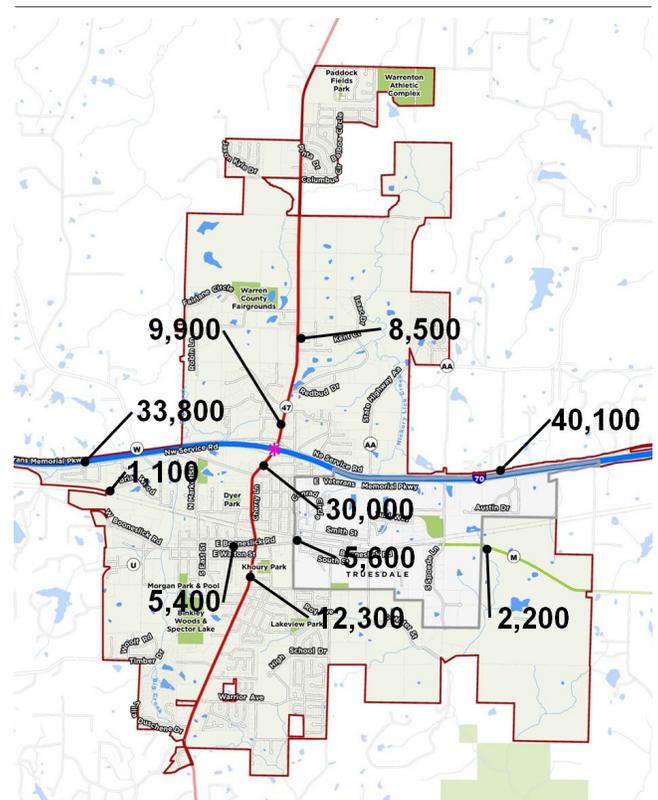
The City of Warrenton, Warren County, and MODOT have jurisdiction over almost every transportation facility within the City, with the exception of privately owned and maintained facilities. The Federal Highway Administration controls the Interstate Highway system, with administration by MoDOT. MoDOT has operational and maintenance control of the major arterial streets, such as Route 47, the I-70 outer roads, and Route M and MM.

I-70 is a four-lane corridor that carries approximately 40,000 vehicles per day. Known as a regional corridor for the movement of goods and services, truck traffic makes up approximately 25% of the total traffic volume. Route 47 serves local traffic between I-44 to the south in Franklin County, to U.S. Highway 61 in Lincoln County. Route 47 is mostly considered a two lane minor collector; however, the facility was widened in the mid 1990's to provide two lanes in each direction, with a bi-directional center turn lane through much of Warrenton. Near the interchange at I-70, average daily traffic is about 25,000 vehicles per day. If traffic volumes along Route 47 continue to grow at historical rates, the volume on Route 47 could exceed 50,000 vehicles per day by year 2035.

The following table and exhibit depicts functional classification and average daily traffic along significant corridors in the City of Warrenton.

The commercial centers adjacent to Route 47 between Old

Traffic Counts



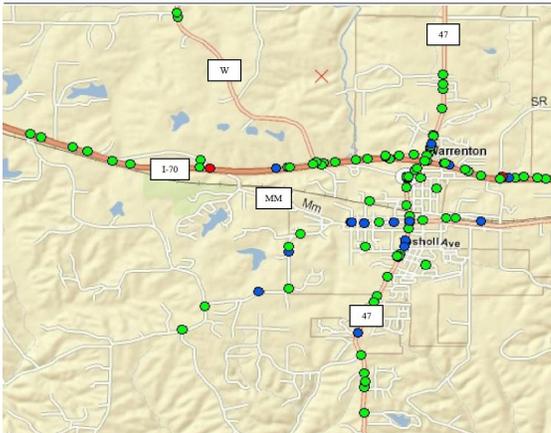
Source: GBA

Table: Average Daily Traffic

FACILITY	FUNCTION CLASSIFICATION	NO OF PRIMARY LANES	LEVEL OF ACCESS CONTROL	SPEED LIMIT
I-70	Interstate	4	Controlled	70 mph
Route 47	Minor Arterial	4	Normal	30 mph
Route MM	Major Collector	2	Normal	25 mph
Route A/B	Major Collector	2	Normal	55 mph
North Outer Road	Minor Collector	2/3	Normal	45/55 mph
South Outer Road	Minor Collector	2/3	Normal	40/55 mph

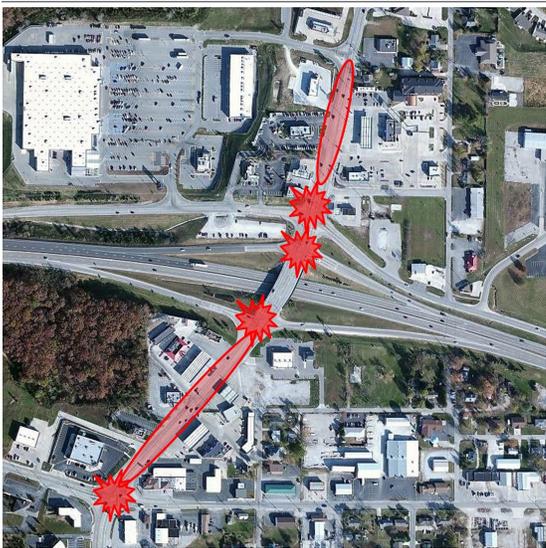
Sources: GBA

2010 Crash Locations



Source: Interstate 70 and Route MM AJR, Nov. 2011

Crash Locations



Source: GBA

Highway 40 to the south, and Anwijo Way to the North currently experience a high vehicular crash frequency. This is likely a result of high traffic volumes and inadequate access management through this segment of roadway. There exist five traffic signals within about a half mile, with very close intersection spacing between the I-70 westbound ramp junction and the north outer road. Many of the commercial properties consist of multiple entrances, with excessive widths. Each of these factors contributes to a vehicle crash rate along this segment which exceeds the Statewide Rate for numbered routes by over 200% each of the past ten years.

The City of Warrenton is currently served by a single, diamond interchange at Route 47. The I-70 and Route 47 interchange is the core of the City's transportation system. Nearly every trip coming to the City, or leaving, goes through this interchange. As traffic volumes increase, the capacity of the interchange will continue to be strained, and a single point of access will not be sufficient for future traffic demands.

The Improve "I-70 EIS" proposes improving the interchange at Route 47. The plan is to add additional turn lanes and relocate the North Outer Road further north to attain spacing for outer roads and increasing the length of acceleration/ decelerating lanes.

Roadway System: Safety History

The traffic crash record data for the City of Warrenton was obtained from the State records through MoDOT. The commercial centers adjacent to Route 47 between Old Highway 40 to the south, and Anwijo Way to the North currently experience a high vehicular crash frequency. This is likely a result of high traffic volumes and inadequate access management through this segment of roadway. There are five traffic signals within about a half mile, with very close intersection spacing between the I-70 westbound ramp junction and the north outer road. Many of the commercial properties consist of multiple entrances, with excessive widths. Each of these factors contributes to a vehicle crash rate along this segment which exceeds the Statewide Rate for numbered routes by over 200% each of the past ten years.

Over a five year period, there were 521 reported vehicle crashes on I-70 between Route A/B and Route 47, again exceeding the statewide average rate by about 200%. The following summarizes vehicular crashes along the I-70 and Route 47 corridors, as well as at intersections along Route 47 with a high crash experience:

Table: Intersection Vehicle Crashes

INTERSECTION OF RT 47 AND -	NO. VEHICLE CRASHES (2006 - 2010)
North Outer Road	86
WB I-70 Ramps	35
WB I-70 Ramps	46
Veterans Memorial Parkway	70
Route MM	43

Sources: GBA

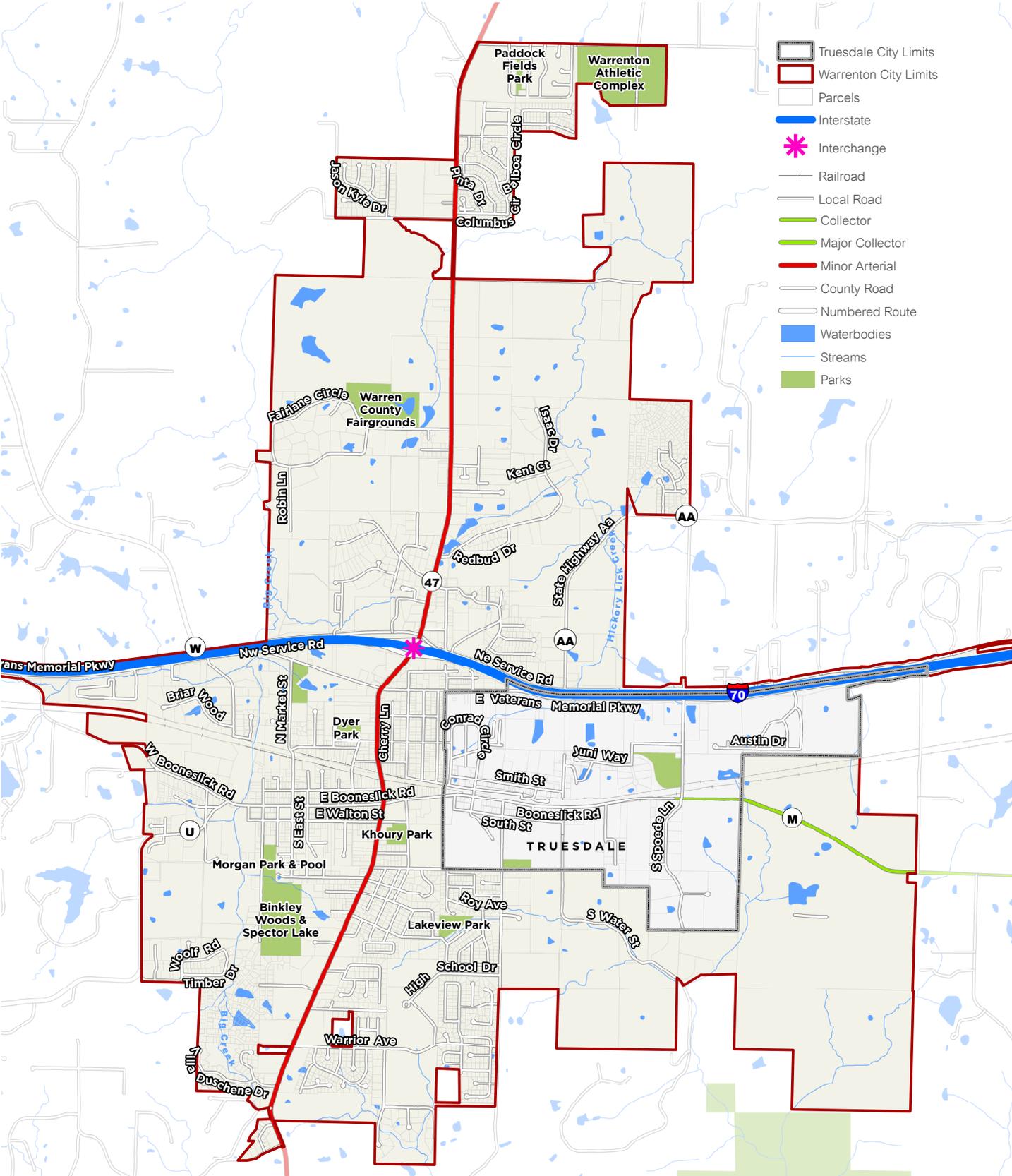
Table: Vehicular Crashes at I-70 and Route 47 Corridors

ROUTE	TOTAL	2006	2007	2008	2009	2010
I-70 (Rt A/B to Rt 47)	521	110	103	88	104	116
Route 47 (NOR to Rt MM)	329	74	53	67	76	59

Sources: GBA

Existing Roadway System Map (2015)

Figure: 5



Roadway System: What have we done?

To date, the City of Warrenton has addressed their thoroughfare and roadway network concerns from both a planning and implementation perspective.

The Boonslick Regional Planning Commission's "2005 Transportation Plan" identified the need to upgrade Route 47's capacity and identified the construction of Route MM extension and Route 47 bypass around Warrenton as a regional priority.

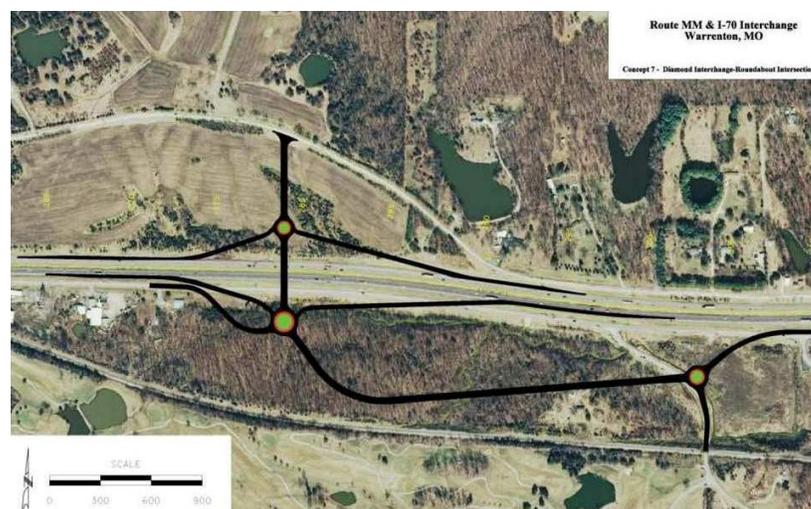
In 2006, MoDOT commissioned a traffic study which examined the need for a new interchange to alleviate congestion at the I-70 and Route 47 interchange. A new interchange was considered in the proximity of the existing Stracks Church Road overpass, east of Route 47.

In 2011, the City commissioned a transportation study to identify the benefits of a proposed extension of Missouri Route MM over Interstate 70 at a new diamond interchange with roundabouts at the ramp terminals, as established by "Interstate 70 and MO Route MM Interchange Access Justification Report" dated November 2011, and prepared by Crawford, Murphy & Tilly, Inc. The purpose and need of the study was identified as follows, notably similar to the "Key Issues" listed previously:

- Reduce congestion along the route 47 corridor.
- Improve roadway connectivity between the northern and southern portions of the City of Warrenton and Warren County.
- Serve as a bypass around the north and west sides of Warrenton to support planned local land use changes and economic development north and west of the current city center, as well as diverting through traffic off of Route 47 north of Interstate 70..
- Improve emergency response abilities north and south across the interstate.
- The proposed Route MM interchange location was preferred over the Stracks Church Road location by officials due to existing geometric constraints, Norfolk Southern Railroad, and stronger growth potential to the west of Warrenton.

However, within the past few years, voters rejected a TIF proposal to help finance a new interchange at I-70 and Route MM, and without a sustainable funding mechanism from MoDOT, a new interchange for the City of Warrenton will not be considered a priority.

Several roadway widening and improvement projects have been implemented along Route 47 over the past 20 years to accommodate increasing traffic demands. Improvements to Hickory Lick Road are in the implementation phases to address increased traffic demands associated with the Warrenton Athletic Complex.



Source: City of Warrenton

PEDESTRIAN AND BICYCLE FACILITIES

What do we have?

Central Warrenton has a complete sidewalk system (with sidewalks on both sides of streets) can be found in downtown and nearby older residential neighborhoods. Outside of the central business district, newer developments have sidewalks, but in many other locations, sidewalks are limited.

Most of the existing sidewalk facilities are adjacent to streets. Many of the sidewalks are disjointed, and do not consist of continuous segments. Some of the sidewalk segments and ramps do not comply with current ADA minimum guidelines.

Sidewalks or walking areas adjacent to congested segments along Route 47 are not well defined, and pedestrians are forced to cross numerous, very wide driveway approaches. Heavy traffic volumes with poor access management can be dangerous for pedestrians and bicyclists.

Similar to vehicular traffic, connectivity between the north and south sides of I-70 is limited for pedestrians and bicyclists. The current bridge over I-70 does not provide safe accommodations for walkers and bikers.

Research suggests that individuals are willing to walk up to one-quarter mile within urban environments. Living within one-eighth (1/8) mile of neighborhood retail establishments increases the likelihood of walking compared with living at least one-half (1/2) mile from retail. The community as a whole can be made walkable by incorporating street design that encourages walkability and makes it a pleasurable experience.

What have we done?

The City of Warrenton has done a good job recently, taking on several sidewalk and ADA upgrade projects at locations that have been deemed best opportunities for pedestrian access.

Recent sidewalk and ADA upgrades have been completed along Market Street to provide connectivity between the downtown business district and shopping centers near Old 40.

Sidewalks and ADA upgrades have also been completed along Route 47 between Old 40 and Walton Street, along Walton Street between Route 47 and Market Street, and along Old 40 between Market Street and Route 47.

MULTI-MODAL TRANSPORTATION

What do we have?

Like most other communities along the perimeter of the St. Louis metropolitan area, the primary mode of transportation for Warrenton is via personal vehicle. Although vehicular travel is the most common means of transportation, it is still necessary to review the multi-modal transportation components available to the citizens of Warrenton.

Railroad...The region is served by the Norfolk Southern Railroad through the center of Warrenton. This is a primary freight route, and no passenger service is offered. Many of the existing rail spurs within the Warrenton and Truesdale City limits have been decommissioned, and are no longer in use. At-grade crossings exist at Route MM, Market Street, Troy Street, Laura Street, and S. Spoede Lane. Route 47 crosses over the railroad. There is one pedestrian bridge over the railroad at Steinhagen Street, located about 630 feet to the east of the Route 47 crossing.

Airports...The nearest regional airport is Washington Municipal Airport, and is located in Warren County near Dutzow on Highway 47. The nearest International airport is St. Louis Lambert International Airport, just 45 minutes to the east.

Public Transportation...According to the Boonslick Region Public Transit-Human Services Transportation Coordination Plan, 2013, the total number of seniors (65 and over) within Warren County increased by 49% between 2000 and 2010. OATS, a private not-for-profit corporation, is the dominate provider of public transportation in the Boonslick region and Warrenton. OATS serves anyone who lives in a rural area, regardless of age or income. Taxi services in the region exist at a basic level due to cost.

What have we done?

As a car dependent community, many of the multi-model transportation elements are not considered a priority with the City of Warrenton, and as a result, the focus of the transportation system has been diverted to other priorities...for now.



COMMUNITY FACILITIES

Why It Matters

The resources local governments provide and the facilities they maintain contribute greatly to the quality of life and economic prosperity of a community. The goal of mapping public facilities, as part of comprehensive planning, is not to create an exhaustive list of sites. Instead, its value is in the identification of critical systems that have the following characteristics: 1) The facility serves a community interest, 2) Each unit is part of a larger system of service delivery, and 3) It represents a substantial capital investment.

Community Facilities

Although the provision of each public service is reflected in the strategic location of buildings, location is also determined by the historic development pattern, the community served, and the income stream that is expected to support the facility. Well-designed facilities and a high level of urban services strengthen the community and represent an asset to neighborhood life. The following categories of public facilities were identified: Libraries, Police Services, Fire Services, Emergency Medical Services, Municipal Buildings, Schools (public/private), Health and Human Services, Churches, Cemeteries, and Parks & Recreation Facilities.



City Services

The City provides a variety of essential community services through its departments:

- Police
- Municipal Court
- Animal Control
- Building, Grounds & Maintenance
- City Clerk
- Administration
- Finance
- Economic Development
- Planning & Zoning
- Public Works
- Recreation

County Services

The County relies on several Warren County services including:

- Assessor and Collector
- Library
- Emergency Management
- Sanitarian
- Planning and Zoning
- Prosecuting Attorney
- Public Health
- Sheriff



Districts

These Districts also provide services to the City: Warrenton Fire Protection District, Warren County R-3 District and Warren County Ambulance District

Warrenton's residents and businesses benefit from a system of facilities and services. The planning process will identify assets and issues related to these organizations and City departments. The capacity, quality, and reliability of these facilities and services influence the identity of the city and supports opportunities for future business and residential growth. As many of the service providers are not under the purview of the City, they are not topics for a Comprehensive Plan. The Plan will stress collaboration and intergovernmental coordination in order to achieve mutually beneficial goals that will ensure citizens continue to be well served as demand for public services evolves.



Source: City of Warrenton

Existing Community Facilities (2015)

Figure: 6

