

# Saint Louis Zoo WildCare Park Economic Impact Analysis

Released June 2024



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# 1 Research Overview



# Introduction

The Saint Louis Zoo is investing \$230 million to develop a second campus called the Saint Louis Zoo WildCare Park. The Saint Louis Zoo WildCare Park will be constructed on 425-acres located in unincorporated Spanish Lake, Missouri, strategically positioned between the Missouri Department of Conservation's Columbia Bottoms and the historic Chain of Rocks Bridge.

The Saint Louis Zoo WildCare Park project began in 2019 and will open to the public in 2027. The WildCare Park will amplify the Zoo's conservation work by providing non-public pastures devoted to the breeding of endangered species as well as provide a unique unparalleled experience to visitors as they embark on a captivating drive-through the safari.

The Saint Louis Zoo WildCare Park annual operations, along with the spending by visitors at local, off-site establishments and businesses, is expected to generate significant economic and fiscal (tax) impacts in the local economy of the City of St. Louis / St. Louis County and the St. Louis, MO-IL MSA economy. This study analyzes the impacts attributable to Saint Louis Zoo WildCare Park for both economies.

Tourism Economics prepared a comprehensive model to quantify the impacts arising from annual operational spending and capital expenditures at the WildCare Park, as well as visitor spending at off-site establishments throughout the local economy.

The operational spending accounts for expenditures from 2021 through 2034, which includes planning and development (2021 through 2026) and the first eight years of operations (2027 through 2034). The visitor spending impacts are for the eight-year period from 2027 to 2034.

Impact modeling is based on an IMPLAN input-output (I-O) model for the following regions:

- City of St. Louis / St. Louis County
- St. Louis, MO-IL MSA

The results of this study show the scope of the WildCare Park's potential future impacts in terms of direct operational spending, off-site visitor spending, as well as total economic impacts, including total business sales, employment, labor income, and fiscal (tax) impacts.

# Scenario Descriptions

The impact study includes an analysis for two scenarios:

1. City/County Scenario
2. MSA Scenario

Each scenario includes a calculation for off-site spending at local businesses by non-local attendees. WildCare Park attendees originating from within the local economy are excluded from the analysis due to the substitution effect, which assumes that local attendees will spend money in the local economy if they did not visit the WildCare Park.

The definition of the term 'local' is different in each scenario.

For the City/County Scenario, 'local' is defined as any resident living in the City/County boundaries. Therefore, only spending by WildCare Park attendees originating outside the City/County economy is included in the City/County Scenario. Off-site spending by local attendees originating from within the City/County is excluded.

For the MSA Scenario, 'local' is defined as any resident living in the MSA boundaries, which includes all City/County residents. Therefore, only spending by WildCare Park attendees originating outside the MSA economy is included in the MSA Scenario. Off-site spending by local attendees originating from within the MSA is excluded.

The City/County Scenario and MSA Scenario are separate analyses and the results from each analysis cannot be combined.

## Off-Site Visitor Spending Definitions

	City/County	MSA
<b>Attendee Origin</b>		
City/County resident	Local / Excluded	Local / Excluded
Inside MSA, but outside City/County	Included	Local / Excluded
Outside MSA	Included	Included

## 2 Key Findings



# Summary Findings

## Saint Louis Zoo WildCare Park summary impacts through 2034

The Saint Louis Zoo WildCare Park is expected to generate an economic impact of \$599.3 million in the City/County economy through 2034.

**City/County Economic Impacts:** The Saint Louis Zoo WildCare Park is expected to generate an economic impact of \$599.3 million in the City/County, which is expected to support 368 annualized part-time and full-time jobs and generate \$42.9 million in state and local tax revenues.

**MSA Economic Impact:** The Saint Louis Zoo WildCare Park is expected to generate an economic impact of \$661.8 million in the MSA, which is expected to support 384 annualized part-time and full-time jobs and generate \$49.9 million in state and local tax revenues.

**Saint Louis Zoo WildCare Park Summary Economic Impacts through 2034**  
(\$ millions and number of annualized jobs)

	Economic Impacts	
	City/County	MSA
Business Sales	\$599.3	\$661.8
Personal Income	\$242.6	\$264.6
Employment (annualized)	368	384
Taxes	\$78.6	\$97.3
State and local taxes	\$42.9	\$49.9
Federal taxes	\$35.6	\$47.4

Source: Tourism Economics

Note: Totals may not sum due to rounding.

Jobs are presented as annualized part-time and full-time jobs. Annualized employment impacts represent the annual average number of jobs over the 14-year period 2021 through 2034.

# SAINT LOUIS ZOO WILDCARE PARK (CITY/COUNTY)

## SUMMARY CITY/COUNTY ECONOMIC IMPACTS THROUGH 2034



### DIRECT SPENDING IMPACTS

The Saint Louis Zoo WildCare Park is expected to generate significant economic impacts in the City/County economy as the WildCare Park will spend money in the local economy in the form of annual operational expenditures.

In addition to spending money during their visit to the WildCare Park, visitors will also spend money at businesses and establishments in the local economy during their stay in the City/County, including local restaurants, retailers, and recreation/entertainment venues.

The WildCare Park is expected to generate \$356.9 million in direct spending in the City/County through 2034, as outlined below.



### \$356.9 MILLION

**Direct Spending Impact of the Saint Louis Zoo WildCare Park in the City/County through 2034**



### \$162.7 MILLION

Zoo Operating Expenditures



### \$194.2 MILLION

Off-Site Spending by Zoo Visitors

### TOTAL ECONOMIC IMPACTS IN THE CITY/COUNTY

The WildCare Park's direct spending impact of \$356.9 million is expected to generate a total economic impact of \$599.3 million in the City/County, which is expected to support 368 annualized part-time and full-time jobs and generate \$42.9 million in state and local taxes through 2034.



### \$599.3 MILLION

**Total Economic Impact of the Saint Louis Zoo WildCare Park in the City/County through 2034**

### ECONOMIC IMPACTS OF THE SAINT LOUIS ZOO WILDCARE PARK IN THE CITY/COUNTY THROUGH 2034



### \$599.3M

**Total Economic Impact**



### 368

**Total Annualized Jobs Generated**



### \$42.9M

**Total State & Local Tax Revenues**



# SAINT LOUIS ZOO WILDCARE PARK (MSA) SUMMARY MSA ECONOMIC IMPACTS THROUGH 2034



## DIRECT SPENDING IMPACTS

The Saint Louis Zoo WildCare Park is expected to generate significant economic impacts in the MSA as the WildCare Park will spend money in the local economy in the form of annual operational expenditures.

In addition to spending money during their visit to the WildCare Park, visitors will also spend money at businesses and establishments in the local economy during their stay in the MSA, including local restaurants, retailers, and recreation/entertainment venues.

The WildCare Park is expected to generate \$346.5 million in direct spending in the MSA through 2034, as outlined below.



### \$346.5 MILLION

Direct Spending Impact of the Saint Louis Zoo WildCare Park in the MSA through 2034



### \$162.7 MILLION

Zoo Operating Expenditures



### \$183.8 MILLION

Off-Site Spending by Zoo Visitors

## TOTAL ECONOMIC IMPACTS IN THE MSA

The WildCare Park's direct spending impact of \$346.5 million is expected to generate a total economic impact of \$661.8 million in the MSA, which is expected to support 384 annualized part-time and full-time jobs and generate \$49.9 million in state and local taxes through 2034.



### \$661.8 MILLION

Total Economic Impact of the Saint Louis Zoo WildCare Park in the MSA through 2034

## ECONOMIC IMPACTS OF THE SAINT LOUIS ZOO WILDCARE PARK IN THE MSA THROUGH 2034



### \$661.8M

Total Economic Impact



### 384

Total Annualized Jobs Generated



### \$49.9M

Total State & Local Tax Revenues

# 3 Direct Impacts



# Direct Impacts

## Direct impact summary

**The Saint Louis Zoo WildCare Park is expected to generate an estimated \$356.9 million in direct spending in the City/County through 2034.**

The accompanying table outlines the direct spending impacts of the Saint Louis Zoo WildCare Park in the St. Louis City/County and St. Louis MSA economies. These direct impacts ultimately serve as the inputs for the economic impact model.

The Saint Louis Zoo WildCare Park (City/County Scenario) direct spending through 2034 is expected to comprise of the following categories:

1. Approximately \$162.7 million in total **operating expenditures**, including \$16.3 million in operating expenditures in 2027.
2. Approximately \$194.2 million in **off-site spending by non-local visitors**, including spending at local restaurants, retailers, and recreation/entertainment venues. The off-site non-local visitor spending is expected to amount to \$20.9 million in 2027.

### Saint Louis Zoo WildCare Park direct impact summary through 2034 (\$ millions)

	Economic Impacts	
	City/County	MSA
<b>Total direct spending</b>	<b>\$356.9</b>	<b>\$346.5</b>
Operating expenditures	\$162.7	\$162.7
Visitor spending	\$194.2	\$183.8

Source: Canopy Strategic Partners, Tourism Economics

# Direct Impacts

## Operational spending

**The Saint Louis Zoo WildCare Park is expected to incur \$162.7 million in operating expenses through 2034.**

The Saint Louis Zoo WildCare Park is expected to incur \$162.7 million in operational expenses through 2034, which includes \$88.4 million in salaries and wages.

The WildCare Park is expected to incur \$16.3 million in operational expenses in 2027, the first year of operations.

### **Saint Louis Zoo WildCare Park operational spending through 2034** (\$ millions)

<b>Total operational spending</b>	<b>\$162.7</b>
Salaries, Wages, and Benefits	\$88.4
Administration	\$0.7
Animal Care & Health	\$3.5
Architecture & Planning	\$0.7
Distribution	\$0.1
Education	\$2.8
External Relations	\$4.0
Facilities Management	\$2.6
Finance	\$0.2
Internal Relations	\$2.1
Membership	\$2.3
Research	\$0.3
Admission & Parking	\$15.2
Food & Retail	\$19.0
Tours	\$5.8
Attractions	\$2.2
Events & Lodging	\$12.7

Source: Canopy Strategic Partners

# Direct Impacts

Visitor count and origin (City/County scenario)

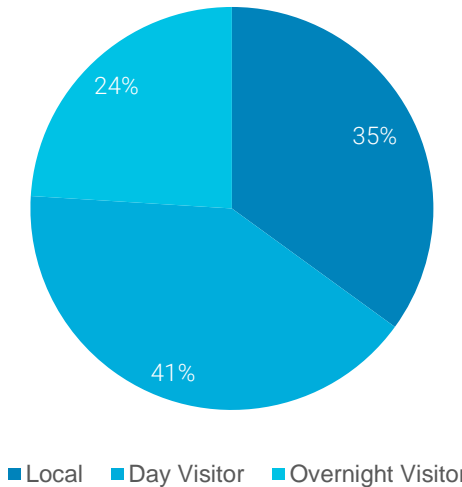
**Approximately 65% of Saint Louis Zoo WildCare Park visitors are expected to originate from outside the City/County.**

The Saint Louis Zoo WildCare Park is expected to attract an average of 421,900 visitors each year from 2027 through 2034, peaking at 425,000 visitors between 2028 and 2034.

Approximately 65% (or 274,200 on average each year) of all visitors are expected to originate from outside the City/County, which includes 41% that are expected to visit for the day from outside the City/County, and 24% that are expected to spend the night in the City/County.

Each of these non-local visitors are expected to spend money in the City/County at local restaurants, hotels, retailers, and recreation/entertainment venues, as presented on the following page.

WildCare Park (City/County scenario) attendee origin through 2034



Source: Canopy Strategic Partners

# Direct Impacts

Direct spending by industry (City/County scenario)

**Saint Louis Zoo WildCare Park's direct spending impacts in the City/County are expected to be spread across a wide range of sectors within the local economy.**

The Saint Louis Zoo WildCare Park's direct spending impact of \$356.9 million in the City/County is expected to be spread across several industries, including \$162.7 million in operating expenditures, \$61.9 million in food and beverage expenditures, \$48.7 million in lodging expenditures, \$39.3 million in retail purchases, \$26.8 million in entertainment/recreation spending, and \$17.2 million in local transportation.



**\$356.9 MILLION**

**Direct Spending Impact through 2034  
(City/County scenario)**



**\$162.7M OPERATING EXPENDITURES**

Saint Louis Zoo management, marketing, maintenance and repair, salaries/wages



**\$61.9M FOOD & BEVERAGE**

Full-service restaurants, fast food, banquet sales



**\$48.7M LODGING**

Hotels, motels, short-term rentals



**\$39.3M RETAIL**

Souvenirs, general merchandise, malls, local retailers



**\$26.8M ENTERTAINMENT**

Amusements, theaters, entertainment, and other recreation



**\$17.2M LOCAL TRANSPORTATION**

Taxis, buses, parking, public transportation, ride share, gasoline

# Direct Impacts

Visitor count and origin (MSA scenario)

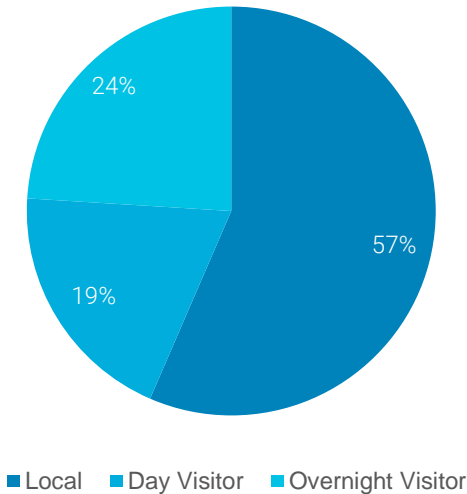
## Approximately 43% of Saint Louis Zoo WildCare Park visitors are expected to originate from outside MSA

The Saint Louis Zoo WildCare Park is expected to attract an average of 421,900 visitors each year from 2027 through 2034, peaking at 425,000 visitors between 2028 and 2034.

Approximately 43% (or 183,500 on average each year) of all visitors are expected to originate from outside the MSA, which includes 19% that are expected to visit for the day from outside the MSA, and 24% that are expected to spend the night in the MSA.

Each of these non-local visitors are expected to spend money in the MSA at local restaurants, hotels, retailers, and recreation/entertainment venues, as presented on the following page.

WildCare Park (MSA scenario) attendee origin through 2034



Source: Canopy Strategic Partners

# Direct Impacts

Direct spending by industry (MSA scenario)

**Saint Louis Zoo WildCare Park's direct spending impacts in the MSA are expected to be spread across a wide range of sectors within the local economy.**

The Saint Louis Zoo WildCare Park's direct spending impact of \$346.5 million in the MSA is expected to be spread across several industries including \$162.7 million in operating expenditures, \$55.4 million in food and beverage expenditures, \$54.2 million in lodging expenditures, \$35.5 million in retail purchases, \$25.2 million in entertainment/recreation spending, and \$13.4 million in local transportation.



**\$346.5 MILLION**

**Direct Spending Impact through 2034  
(MSA scenario)**



**\$162.7M OPERATING EXPENDITURES**

Saint Louis Zoo management, marketing, maintenance and repair, salaries/wages



**\$55.4M FOOD & BEVERAGE**

Full-service restaurants, fast food, banquet sales



**\$54.2M LODGING**

Hotels, motels, short-term rentals



**\$35.5M RETAIL**

Souvenirs, general merchandise, malls, local retailers



**\$25.2M ENTERTAINMENT**

Amusements, theaters, entertainment, and other recreation



**\$13.4M LOCAL TRANSPORTATION**

Taxis, buses, parking, public transportation, ride share, gasoline



# 4 Economic Impacts Summary



# Economic Impact Approach

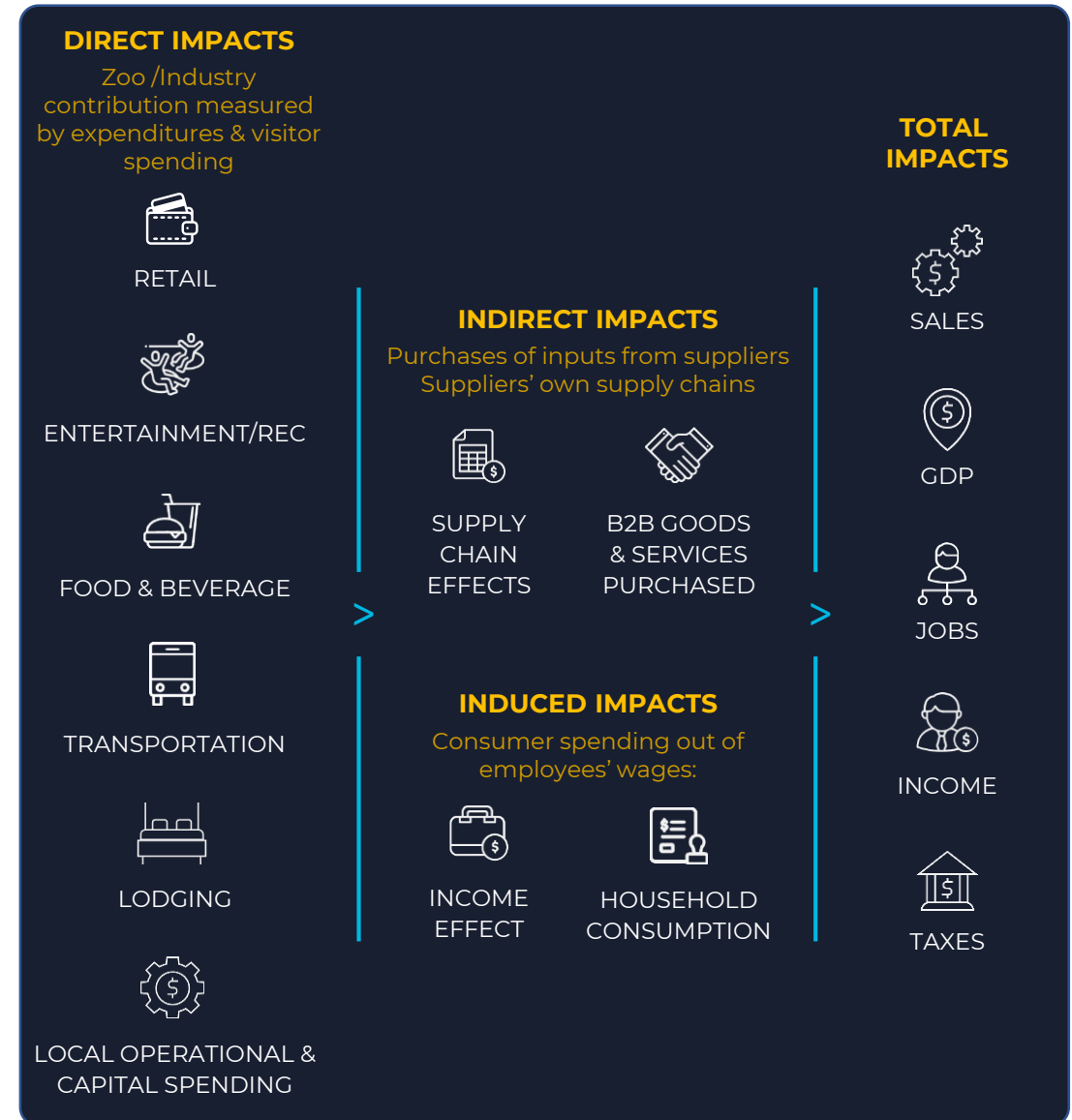
## Introduction and definitions

The economic impacts of Saint Louis Zoo WildCare Park's direct spending were estimated using regional Input-Output (I-O) models based on customized IMPLAN ([www.implan.com](http://www.implan.com)) models for the City of St. Louis / St. Louis County and St. Louis MO-IL MSA economies. IMPLAN is recognized as an industry standard in local-level I-O models. An I-O model represents a profile of an economy by measuring the relationships among industries and consumers to track the flow of industry revenue to wages, profits, capital, taxes and suppliers. The supply chain is traced as dollars flow through the economy, representing indirect impacts. The model also calculates the induced impacts of spending. Induced impacts represent benefits to the economy as incomes earned as a result of direct spending are spent in the local economy, generating additional sales, jobs, taxes, and income.

The modeling process begins with aligning the direct expenditure measurements with the related sectors in the model (e.g. hotels, restaurants, retail, and recreation). The model is then run to trace the flow of these expenditures through the economy. In this process, the inter-relationships between consumers and industries generate each level of impact.

IMPLAN calculates three levels of impact – direct, indirect, and induced – for a broad set of indicators. These include the following:

- Business sales (also called gross output)
- Household income (including wages and benefits)
- Employment
- Federal taxes
- State and local taxes



# Summary Total Economic Impacts

Saint Louis Zoo WildCare Park summary impacts through 2034

The Saint Louis Zoo WildCare Park is expected to generate an economic impact of \$599.3 million in the City/County economy through 2034.

**City/County Economic Impacts:** The Saint Louis Zoo WildCare Park is expected to generate an economic impact of \$599.3 million in the City/County, which is expected to support 368 annualized part-time and full-time jobs and generate \$42.9 million in state and local tax revenues.

**MSA Economic Impact:** The Saint Louis Zoo WildCare Park is expected to generate an economic impact of \$661.8 million in the MSA, which is expected to support 384 annualized part-time and full-time jobs and generate \$49.9 million in state and local tax revenues.

**Saint Louis Zoo WildCare Park Summary Economic Impacts through 2034**  
(\$ millions and number of annualized jobs)

	Economic Impacts	
	City/County	MSA
Business Sales	\$599.3	\$661.8
Personal Income	\$242.6	\$264.6
Employment (annualized)	368	384
Taxes	\$78.6	\$97.3
State and local taxes	\$42.9	\$49.9
Federal taxes	\$35.6	\$47.4

Source: Tourism Economics  
 Note: Totals may not sum due to rounding.  
 Jobs are presented as annualized part-time and full-time jobs. Annualized employment impacts represent the annual average number of jobs over the 14-year period 2021 through 2034.

# 5 Saint Louis Zoo Impacts: City/County



# Economic Impacts (City/County Scenario)

Summary impacts in City/County

## Summary City/County economic impacts attributable to Saint Louis Zoo WildCare Park through 2034

(\$ millions and annualized jobs)

	Direct Impacts	Indirect Impacts	Induced Impacts	Total Impacts
Business Sales	\$356.9	\$155.9	\$86.5	\$599.3
Personal Income	\$144.7	\$61.5	\$36.5	\$242.6
Employment (annualized)	269	60	39	368

Source: Tourism Economics

Note: Jobs are presented as annualized part-time and full-time jobs. Annualized employment impacts represent the annual average number of jobs over the 14-year period 2021 through 2034.

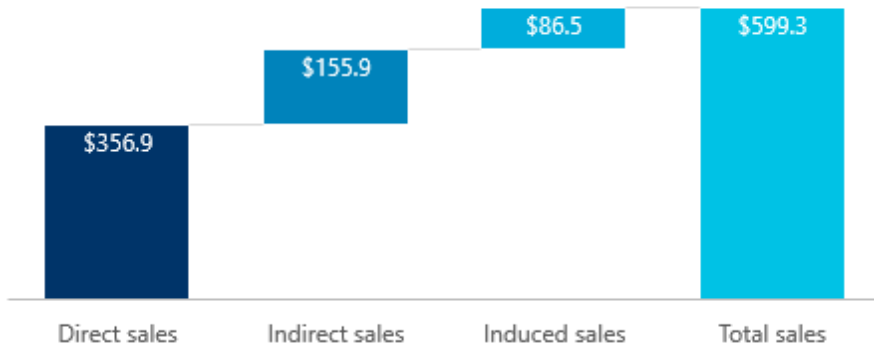
# Business Sales by Industry (City/County Scenario)

Saint Louis Zoo WildCare Park business sales impacts in City/County through 2034

The Saint Louis Zoo WildCare Park is expected to generate \$599.3 million of total output (business sales) in the City/County through 2034.

The Saint Louis Zoo WildCare Park operations and visitor spending is expected to generate \$356.9 million in direct spending, \$155.9 million in indirect expenditures and \$86.5 million in induced expenditures, resulting in a total economic impact of \$599.3 million in the City/County through 2034.

Summary business sales impacts attributable to the WildCare Park through 2034  
(\$ millions)



## Business Sales impacts by industry through 2034

(\$ millions)

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
<b>Total, all industries</b>	<b>\$356.9</b>	<b>\$155.9</b>	<b>\$86.5</b>	<b>\$599.3</b>
<b>By industry</b>				
Recreation and Entertainment	\$150.5	\$1.7	\$1.2	\$153.4
Finance, Insurance and Real Estate	\$8.0	\$56.4	\$28.6	\$93.1
Food & Beverage	\$75.3	\$4.5	\$5.6	\$85.3
Lodging	\$61.5	\$0.0	\$0.0	\$61.5
Business Services	\$4.3	\$43.1	\$8.8	\$56.1
Retail Trade	\$45.1	\$1.7	\$6.5	\$53.3
Education and Health Care	\$2.8	\$0.8	\$16.7	\$20.3
Communications		\$15.8	\$4.4	\$20.2
Other Transport	\$3.3	\$8.4	\$1.7	\$13.3
Wholesale Trade		\$6.6	\$4.3	\$10.9
Personal Services		\$3.8	\$4.6	\$8.5
Construction and Utilities		\$6.6	\$1.6	\$8.3
Gasoline Stations	\$6.1	\$0.1	\$0.4	\$6.6
Manufacturing		\$2.9	\$0.5	\$3.5
Government		\$2.6	\$0.8	\$3.4
Air Transport		\$0.8	\$0.7	\$1.5
Agriculture, Fishing, Mining		\$0.1	\$0.0	\$0.1

Source: Tourism Economics

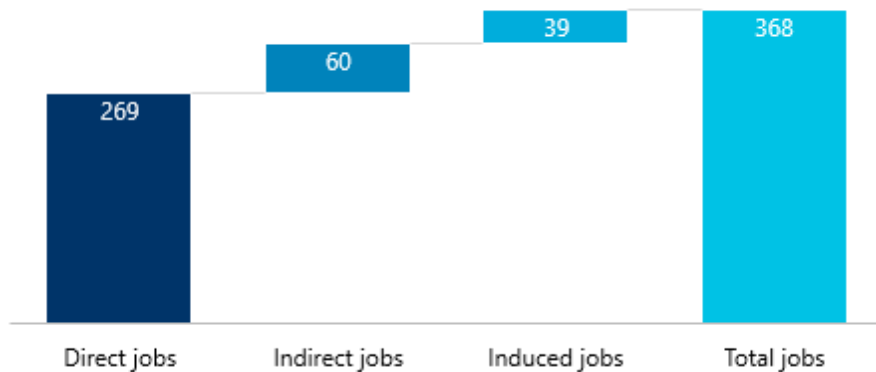
# Employment by Industry (City/County Scenario)

Saint Louis Zoo WildCare Park employment impacts in City/County through 2034

The Saint Louis Zoo WildCare Park is expected to support 368 annualized part-time and full-time jobs in the City/County through 2034.

The Saint Louis Zoo WildCare Park operations and visitor spending is expected to support 368 annualized part-time and full-time jobs in the City/County, including 269 direct jobs, 60 indirect jobs, and 39 induced jobs.

**Summary annualized jobs impacts attributable to the WildCare Park through 2034**  
(Annualized part-time and full-time jobs)



## Employment impacts by industry through 2034.

(Annualized part-time and full-time jobs)

	Direct Employment	Indirect Employment	Induced Employment	Total Employment
<b>Total, all industries</b>	<b>269</b>	<b>60</b>	<b>39</b>	<b>368</b>
<b>By industry</b>				
Recreation and Entertainment	121	1	1	123
Food & Beverage	79	5	6	89
Lodging	46	0	0	46
Business Services	3	20	4	28
Finance, Insurance and Real Estate	2	17	5	24
Retail Trade	15	1	5	20
Education and Health Care	2	1	10	13
Other Transport	2	5	1	8
Personal Services		3	4	7
Communications		2	1	2
Wholesale Trade		1	1	2
Government		1	0	2
Construction and Utilities		1	0	2
Manufacturing		1	0	1
Gasoline Stations	0	0	0	1
Air Transport		0	0	0
Agriculture, Fishing, Mining		0	0	0

Source: Tourism Economics

Note: Totals may not sum due to rounding.

Jobs are presented as annualized part-time and full-time jobs. Annualized employment impacts represent the annual average number of jobs over the 14-year period 2021 through 2034.

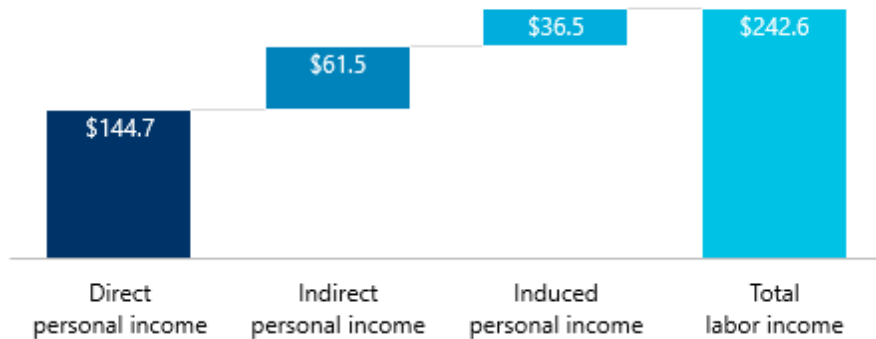
# Labor Income by Industry (City/County Scenario)

Saint Louis Zoo WildCare Park labor income impacts in City/County through 2034

The Saint Louis Zoo WildCare Park is expected to generate \$242.6 million in total labor income in the City/County through 2034.

The Saint Louis Zoo WildCare Park operations and visitor spending is expected to generate \$144.7 million in direct personal income, \$61.5 million in indirect labor income, and \$36.5 million in induced personal income, resulting in \$242.6 million in total labor income in the City/County through 2034.

Summary labor income impacts attributable the WildCare Park through 2034  
(\$ millions)



Labor income impacts by industry through 2034

(\$ millions)

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
<b>Total, all industries</b>	<b>\$144.7</b>	<b>\$61.5</b>	<b>\$36.5</b>	<b>\$242.6</b>
<b>By industry</b>				
Recreation and Entertainment	\$72.7	\$0.4	\$0.5	\$73.5
Business Services	\$3.9	\$26.8	\$5.5	\$36.2
Food & Beverage	\$30.4	\$2.2	\$2.5	\$35.1
Lodging	\$23.8	\$0.0	\$0.0	\$23.8
Finance, Insurance and Real Estate	\$3.5	\$12.6	\$6.4	\$22.5
Education and Health Care	\$2.1	\$0.5	\$10.9	\$13.5
Retail Trade	\$6.8	\$0.7	\$3.0	\$10.5
Other Transport	\$1.3	\$4.6	\$0.8	\$6.7
Personal Services		\$2.7	\$2.7	\$5.4
Wholesale Trade		\$2.7	\$1.7	\$4.5
Communications		\$3.0	\$1.0	\$4.0
Construction and Utilities		\$2.0	\$0.5	\$2.5
Government		\$2.0	\$0.4	\$2.4
Manufacturing		\$1.0	\$0.1	\$1.1
Gasoline Stations	\$0.3	\$0.0	\$0.2	\$0.5
Air Transport		\$0.2	\$0.2	\$0.3
Agriculture, Fishing, Mining		\$0.0	\$0.0	\$0.0

Source: Tourism Economics



# Tax Generation (City/County Scenario)

Saint Louis Zoo WildCare Park fiscal impacts in City/County through 2034

**The Saint Louis Zoo WildCare Park is expected to generate \$78.6 million in governmental revenue through 2034.**

The Saint Louis Zoo WildCare Park operations and visitor spending is expected to generate a total fiscal (tax) impact of \$78.6 million through 2034.

The state government is expected to collect \$17.7 million, and the local government is expected to collect \$25.2 million through 2034 as a result of the Saint Louis Zoo WildCare Park.

## State and local tax revenue through 2034

(\$ millions)

	State	Local	Total
<b>Total taxes</b>	<b>\$17.7</b>	<b>\$25.2</b>	<b>\$42.9</b>
Sales	\$13.7	\$14.4	\$28.1
Bed Tax	\$0.0	\$3.5	\$3.5
Personal Income	\$2.7	\$0.0	\$2.7
Corporate	\$0.4	\$0.0	\$0.4
Social Insurance	\$0.1	\$0.0	\$0.1
Excise and Fees	\$0.8	\$1.5	\$2.3
Property	\$0.1	\$5.7	\$5.8

## Total tax revenue through 2034

(\$ millions)

	Direct	Indirect / Induced	Total
<b>Total Tax Revenues</b>	<b>\$53.9</b>	<b>\$24.7</b>	<b>\$78.6</b>
<b>Federal</b>	<b>\$21.3</b>	<b>\$14.3</b>	<b>\$35.6</b>
Personal Income	\$5.7	\$3.9	\$9.6
Corporate	\$1.4	\$1.5	\$2.9
Indirect Business	\$1.6	\$0.5	\$2.2
Social Insurance	\$12.6	\$8.4	\$20.9
<b>State and Local</b>	<b>\$32.5</b>	<b>\$10.4</b>	<b>\$42.9</b>
Sales	\$21.1	\$7.0	\$28.1
Bed Tax	\$3.5	\$0.0	\$3.5
Personal Income	\$1.6	\$1.1	\$2.7
Corporate	\$0.2	\$0.2	\$0.4
Social Insurance	\$0.1	\$0.0	\$0.1
Excise and Fees	\$1.7	\$0.6	\$2.3
Property	\$4.3	\$1.5	\$5.8

Source: Tourism Economics

# Annual Economic Impacts (City/County Scenario)

Saint Louis Zoo WildCare Park annual economic impacts

## Annual economic impacts (city/county scenario)

(\$ millions and number of jobs)

	Direct Spending														
	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Visitor spend	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$20.9	\$23.2	\$23.8	\$24.2	\$24.7	\$25.2	\$25.8	\$26.3	\$194.2
Operations	\$1.5	\$2.2	\$2.8	\$3.0	\$3.0	\$4.5	\$16.3	\$17.3	\$17.5	\$17.9	\$18.4	\$18.9	\$19.5	\$19.9	\$162.7
<b>Direct spending</b>	<b>\$1.5</b>	<b>\$2.2</b>	<b>\$2.8</b>	<b>\$3.0</b>	<b>\$3.0</b>	<b>\$4.5</b>	<b>\$37.2</b>	<b>\$40.5</b>	<b>\$41.3</b>	<b>\$42.1</b>	<b>\$43.1</b>	<b>\$44.1</b>	<b>\$45.2</b>	<b>\$46.3</b>	<b>\$356.9</b>
	Economic Impacts														
	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Total economic impact	\$2.7	\$3.9	\$5.1	\$5.4	\$5.5	\$8.2	\$62.3	\$67.7	\$69.0	\$70.4	\$72.1	\$73.7	\$75.7	\$77.4	\$599.3
Employment	23	34	44	46	47	70	536	582	593	605	620	634	651	665	368
Taxes	\$0.4	\$0.5	\$0.7	\$0.7	\$0.7	\$1.1	\$8.2	\$8.9	\$9.0	\$9.2	\$9.5	\$9.7	\$9.9	\$10.1	\$78.6
State and local taxes	\$0.2	\$0.3	\$0.4	\$0.4	\$0.4	\$0.6	\$4.5	\$4.9	\$4.9	\$5.0	\$5.2	\$5.3	\$5.4	\$5.5	\$42.9
Federal taxes	\$0.2	\$0.2	\$0.3	\$0.3	\$0.3	\$0.5	\$3.7	\$4.0	\$4.1	\$4.2	\$4.3	\$4.4	\$4.5	\$4.6	\$35.6

Source: Tourism Economics

Note: Totals may not sum due to rounding.

Jobs in the Total column are presented as annualized part-time and full-time jobs, which represent the annual average number of jobs over the 14-year period 2021 through 2034.

# 6 Saint Louis Zoo Impacts: MSA



# Economic Impacts (MSA Scenario)

Summary impacts in MSA

## Summary MSA economic impacts attributable to Saint Louis Zoo WildCare Park through 2034

(\$ millions and annualized jobs)

	Direct Impacts	Indirect Impacts	Induced Impacts	Total Impacts
Business Sales	\$346.5	\$146.0	\$169.3	\$661.8
Personal Income	\$145.1	\$54.5	\$65.0	\$264.6
Employment (annualized)	250	57	76	384

Source: Tourism Economics

Note: Jobs are presented as annualized part-time and full-time jobs. Annualized employment impacts represent the annual average number of jobs over the 14-year period 2021 through 2034.

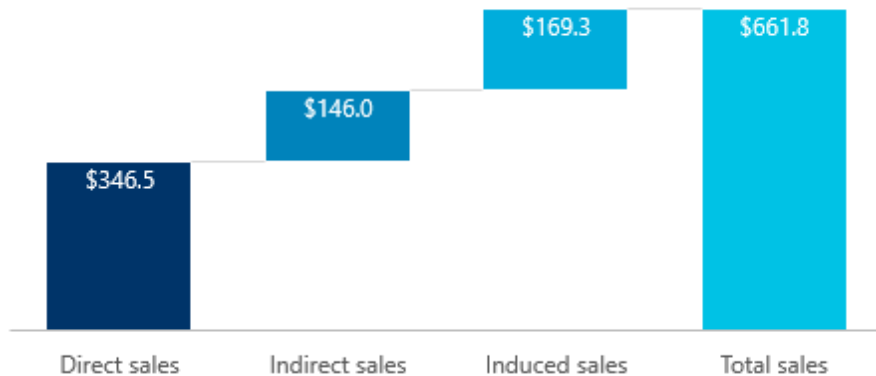
# Business Sales by Industry (MSA Scenario)

Saint Louis Zoo WildCare Park business sales impacts in MSA through 2034

The Saint Louis Zoo WildCare Park is expected to generate \$661.8 million of total output (business sales) in the MSA through 2034.

The Saint Louis Zoo WildCare Park operations and visitor spending is expected to generate \$346.5 million in direct spending, \$146.0 million in indirect expenditures and \$169.3 million in induced expenditures, resulting in a total economic impact of \$661.8 million in the MSA through 2034.

Summary business sales impacts attributable to the WildCare Park through 2034 (\$ millions)



## Business Sales impacts by industry through 2034

(\$ millions)

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
<b>Total, all industries</b>	<b>\$346.5</b>	<b>\$146.0</b>	<b>\$169.3</b>	<b>\$661.8</b>
<b>By industry</b>				
Recreation and Entertainment	\$148.9	\$2.3	\$2.7	\$153.9
Finance, Insurance and Real Estate	\$1.3	\$45.4	\$52.2	\$98.9
Food & Beverage	\$68.8	\$4.6	\$10.4	\$83.7
Lodging	\$66.9	\$0.0	\$0.0	\$67.0
Business Services	\$4.3	\$40.3	\$17.0	\$61.6
Retail Trade	\$41.2	\$1.5	\$11.7	\$54.5
Education and Health Care	\$2.8	\$0.6	\$30.8	\$34.3
Communications		\$13.1	\$8.3	\$21.4
Other Transport	\$6.3	\$9.0	\$4.2	\$19.5
Wholesale Trade		\$6.3	\$8.4	\$14.8
Manufacturing		\$7.2	\$5.9	\$13.1
Construction and Utilities		\$8.7	\$4.3	\$13.0
Personal Services		\$3.2	\$9.1	\$12.3
Gasoline Stations	\$5.9	\$0.1	\$0.8	\$6.7
Government		\$3.0	\$1.9	\$4.9
Air Transport		\$0.5	\$1.1	\$1.6
Agriculture, Fishing, Mining		\$0.3	\$0.3	\$0.6

Source: Tourism Economics

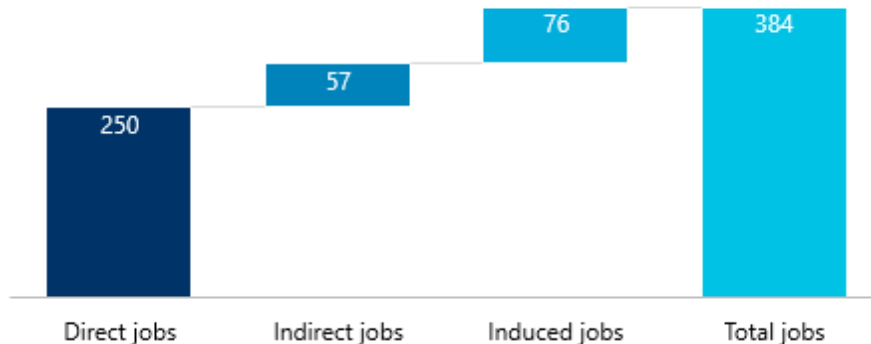
# Employment by Industry (MSA Scenario)

Saint Louis Zoo WildCare Park employment impacts in MSA through 2034

The Saint Louis Zoo WildCare Park is expected to support 384 annualized part-time and full-time jobs in the MSA through 2034.

The Saint Louis Zoo WildCare Park operations and visitor spending is expected to support 384 annualized part-time and full-time jobs in the MSA, including 250 direct jobs, 57 indirect jobs, and 76 induced jobs.

**Summary annualized jobs impacts attributable to the WildCare Park through 2034**  
(Annualized part-time and full-time jobs)



## Employment impacts by industry through 2034.

(Annualized part-time and full-time jobs)

	Direct Employment	Indirect Employment	Induced Employment	Total Employment
<b>Total, all industries</b>	<b>250</b>	<b>57</b>	<b>76</b>	<b>384</b>
<b>By industry</b>				
Recreation and Entertainment	105	2	2	109
Food & Beverage	73	5	11	89
Lodging	46	0	0	46
Business Services	3	20	8	31
Retail Trade	15	1	9	25
Finance, Insurance and Real Estate	0	14	9	24
Education and Health Care	2	0	19	22
Other Transport	5	6	3	13
Personal Services		2	8	10
Wholesale Trade		1	2	3
Communications		2	1	3
Government		1	1	2
Construction and Utilities		1	1	2
Manufacturing		1	1	2
Gasoline Stations	0	0	1	1
Agriculture, Fishing, Mining		0	0	0
Air Transport		0	0	0

Source: Tourism Economics

Note: Totals may not sum due to rounding.

Jobs are presented as annualized part-time and full-time jobs. Annualized employment impacts represent the annual average number of jobs over the 14-year period 2021 through 2034.

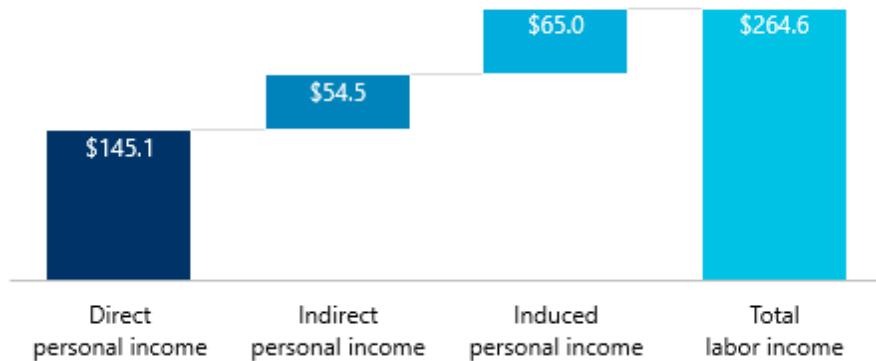
# Labor Income by Industry (MSA Scenario)

Saint Louis Zoo WildCare Park labor income impacts in MSA through 2034

The Saint Louis Zoo WildCare Park is expected to generate **\$264.6 million in total labor income in the MSA through 2034.**

The Saint Louis Zoo WildCare Park operations and visitor spending is expected to generate \$145.1 million in direct personal income, \$54.5 million in indirect labor income, and \$65.0 million in induced personal income, resulting in \$264.6 million in total labor income in the MSA through 2034.

**Summary labor income impacts attributable the WildCare Park through 2034**  
(\$ millions)



**Labor income impacts by industry through 2034**

(\$ millions)

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
<b>Total, all industries</b>	<b>\$145.1</b>	<b>\$54.5</b>	<b>\$65.0</b>	<b>\$264.6</b>
<b>By industry</b>				
Recreation and Entertainment	\$76.1	\$1.0	\$1.2	\$78.3
Business Services	\$4.1	\$23.4	\$9.9	\$37.4
Food & Beverage	\$26.9	\$2.1	\$4.4	\$33.5
Lodging	\$27.3	\$0.0	\$0.0	\$27.3
Education and Health Care	\$1.8	\$0.4	\$19.1	\$21.3
Finance, Insurance and Real Estate	\$0.6	\$9.8	\$10.3	\$20.7
Retail Trade	\$5.6	\$0.5	\$4.7	\$10.9
Other Transport	\$2.5	\$4.6	\$2.0	\$9.1
Personal Services		\$2.2	\$5.3	\$7.4
Wholesale Trade		\$2.3	\$3.0	\$5.3
Communications		\$2.4	\$1.8	\$4.3
Government		\$2.1	\$0.9	\$3.0
Construction and Utilities		\$1.9	\$1.1	\$3.0
Manufacturing		\$1.5	\$0.8	\$2.3
Gasoline Stations	\$0.2	\$0.0	\$0.3	\$0.5
Air Transport		\$0.1	\$0.2	\$0.4
Agriculture, Fishing, Mining		\$0.1	\$0.1	\$0.1

Source: Tourism Economics

# Tax Generation (MSA Scenario)

Saint Louis Zoo WildCare Park fiscal impacts in MSA through 2034

**The Saint Louis Zoo WildCare Park is expected to generate \$97.3 million in governmental revenue through 2034.**

The Saint Louis Zoo WildCare Park operations and visitor spending is expected to generate a total fiscal (tax) impact of \$97.3 million through 2034.

The state governments are expected to collect \$22.2 million, and the local governments are expected to collect \$27.7 million through 2034 as a result of the Saint Louis Zoo WildCare Park.

## State and local tax revenue through 2034

(\$ millions)

	State	Local	Total
<b>Total taxes</b>	<b>\$22.2</b>	<b>\$27.7</b>	<b>\$49.9</b>
Sales	\$15.5	\$14.9	\$30.4
Bed Tax	\$0.3	\$4.0	\$4.3
Personal Income	\$4.6	\$0.2	\$4.8
Corporate	\$0.5	\$0.1	\$0.6
Social Insurance	\$0.1	\$0.0	\$0.1
Excise and Fees	\$1.0	\$1.5	\$2.5
Property	\$0.1	\$7.0	\$7.1

## Total tax revenue through 2034

(\$ millions)

	Direct	Indirect / Induced	Total
<b>Total Tax Revenues</b>	<b>\$59.1</b>	<b>\$38.2</b>	<b>\$97.3</b>
<b>Federal</b>	<b>\$26.0</b>	<b>\$21.4</b>	<b>\$47.4</b>
Personal Income	\$9.2	\$7.8	\$16.9
Corporate	\$1.4	\$1.8	\$3.3
Indirect Business	\$1.7	\$1.0	\$2.7
Social Insurance	\$13.7	\$10.9	\$24.6
<b>State and Local</b>	<b>\$33.1</b>	<b>\$16.8</b>	<b>\$49.9</b>
Sales	\$19.7	\$10.7	\$30.4
Bed Tax	\$4.3	\$0.0	\$4.3
Personal Income	\$2.6	\$2.2	\$4.8
Corporate	\$0.3	\$0.3	\$0.6
Social Insurance	\$0.1	\$0.0	\$0.1
Excise and Fees	\$1.6	\$0.9	\$2.5
Property	\$4.6	\$2.5	\$7.1

Source: Tourism Economics



# Annual Economic Impacts (MSA Scenario)

Saint Louis Zoo WildCare Park annual economic impacts

## Annual economic impacts (MSA scenario)

(\$ millions and number of jobs)

	Direct Spending														
	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Visitor spend	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$20.1	\$22.0	\$22.4	\$22.9	\$23.4	\$23.9	\$24.4	\$24.9	\$183.8
Operations	\$1.5	\$2.2	\$2.8	\$3.0	\$3.0	\$4.5	\$16.3	\$17.3	\$17.5	\$17.9	\$18.4	\$18.9	\$19.5	\$19.9	\$162.7
<b>Direct spending</b>	<b>\$1.5</b>	<b>\$2.2</b>	<b>\$2.8</b>	<b>\$3.0</b>	<b>\$3.0</b>	<b>\$4.5</b>	<b>\$36.4</b>	<b>\$39.2</b>	<b>\$40.0</b>	<b>\$40.8</b>	<b>\$41.8</b>	<b>\$42.7</b>	<b>\$43.8</b>	<b>\$44.8</b>	<b>\$346.5</b>
	Economic Impacts														
	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Total economic impact	\$3.0	\$4.4	\$5.7	\$6.0	\$6.1	\$9.1	\$69.3	\$74.7	\$76.1	\$77.6	\$79.5	\$81.3	\$83.5	\$85.4	\$661.8
Employment	24	36	47	48	50	74	563	606	617	630	645	660	677	693	384
Taxes	\$0.4	\$0.6	\$0.8	\$0.9	\$0.9	\$1.3	\$10.2	\$11.0	\$11.2	\$11.4	\$11.7	\$12.0	\$12.3	\$12.6	\$97.3
State and local taxes	\$0.2	\$0.3	\$0.4	\$0.4	\$0.5	\$0.7	\$5.2	\$5.6	\$5.7	\$5.8	\$6.0	\$6.1	\$6.3	\$6.4	\$49.9
Federal taxes	\$0.2	\$0.3	\$0.4	\$0.4	\$0.4	\$0.7	\$5.0	\$5.4	\$5.5	\$5.6	\$5.7	\$5.8	\$6.0	\$6.1	\$47.4

Source: Tourism Economics

Note: Totals may not sum due to rounding.

Jobs in the Total column are presented as annualized part-time and full-time jobs, which represent the annual average number of jobs over the 14-year period 2021 through 2034.

# 7 Capital Expenditure Impacts



# Summary Findings One-Time Capital Expenditures

Saint Louis Zoo WildCare Park capital expenditure impacts

**The Saint Louis Zoo WildCare Park is expected to cost \$230.0 million to construct, excluding contingencies.**

The Saint Louis Zoo WildCare Park is expected to cost \$230.0 million to construct, including contingencies. The one-time capital spending required to construct the WildCare Park generates a one-time economic impact in both the City/County and MSA economies.

**City/County One-Time Capital Expenditure Impact:** The one-time capital expenditures required to construct the Saint Louis Zoo WildCare Park is expected to generate an economic impact of \$377.7 million in the City/County, which is expected to support 2,555 part-time and full-time jobs and generate \$9.9 million in state and local tax revenues.

**MSA One-Time Capital Expenditure Impact:** The one-time capital expenditures required to construct the Saint Louis Zoo WildCare Park is expected to generate an economic impact of \$461.7 million in the MSA, which is expected to support 3,136 part-time and full-time jobs and generate \$16.3 million in state and local tax revenues.

**Saint Louis Zoo WildCare Park Summary Capital Expenditure Economic Impacts**  
(\$ millions and number of jobs)

	Economic Impacts	
	City/County	MSA
Business Sales	\$377.7	\$461.7
Personal Income	\$183.0	\$201.6
Employment	2,555	3,136
Taxes	\$39.5	\$55.0
State and local taxes	\$9.9	\$16.3
Federal taxes	\$29.5	\$38.7

Source: Tourism Economics

Note: Totals may not sum due to rounding.

# 8 Property Value Impacts



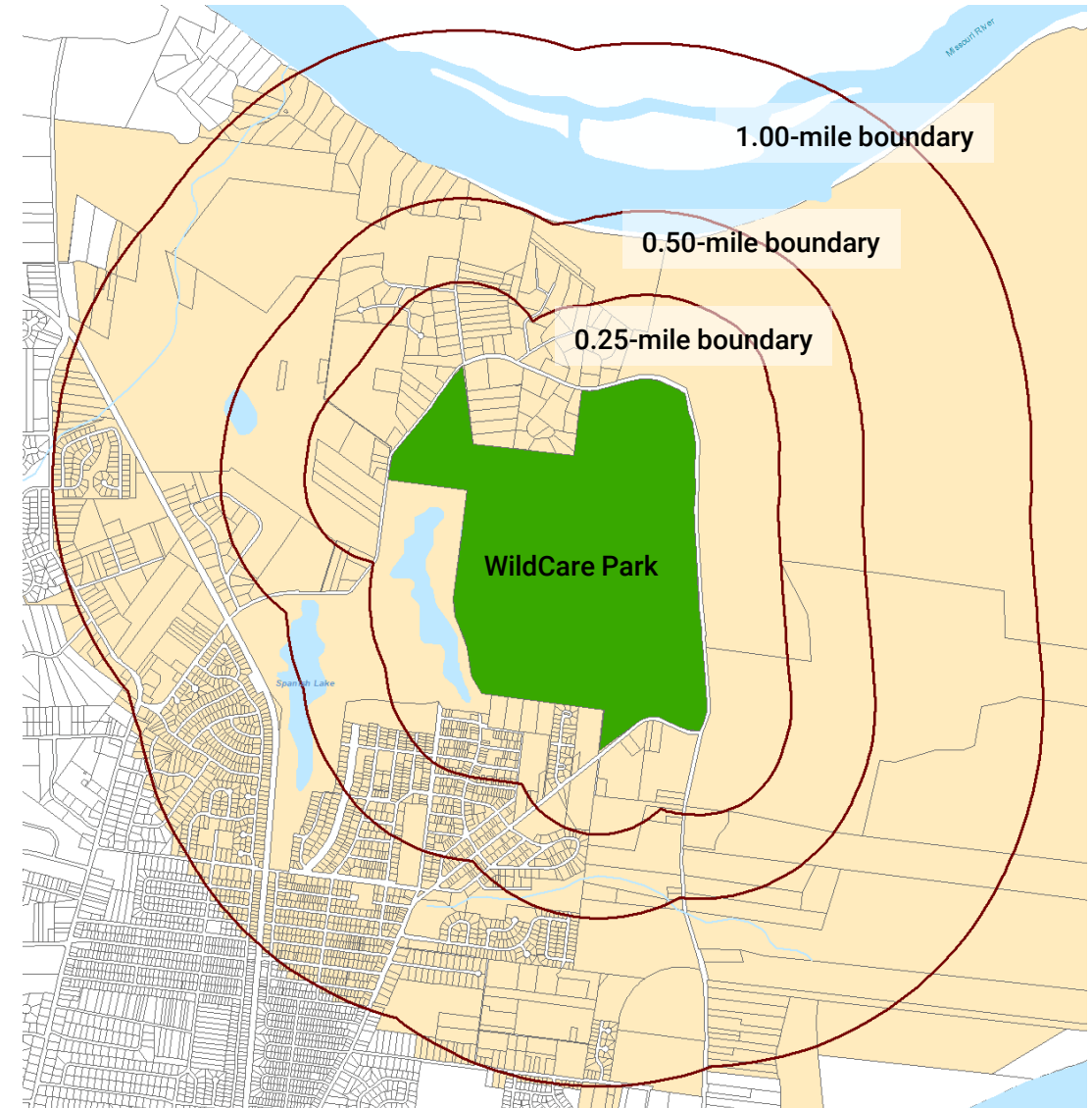
# Property Value Impacts

## Background

Existing literature has shown that attractions like zoos can generate positive property value impacts, as properties in close proximity to zoos are sometimes highly desirable places to live. The research team conducted a comprehensive literature review to compile a set of studies that analyzed historic property value impacts attributable to existing zoos and urban greenspace. The research team also utilized GIS (geographic information systems) analysis to identify the parcels/properties located within 0.25 miles, 0.50 miles, and 1.00 mile from WildCare Park, as well as detailed property assessment data from the City of St. Louis.

The accompanying map outlines the property boundary for WildCare Park, as well as 0.25-mile, 0.50-mile, and 1.00-mile boundaries from WildCare Park.

Saint Louis Zoo WildCare Park 0.25-Mile, 0.50-Mile, and 1.00-Mile Boundaries



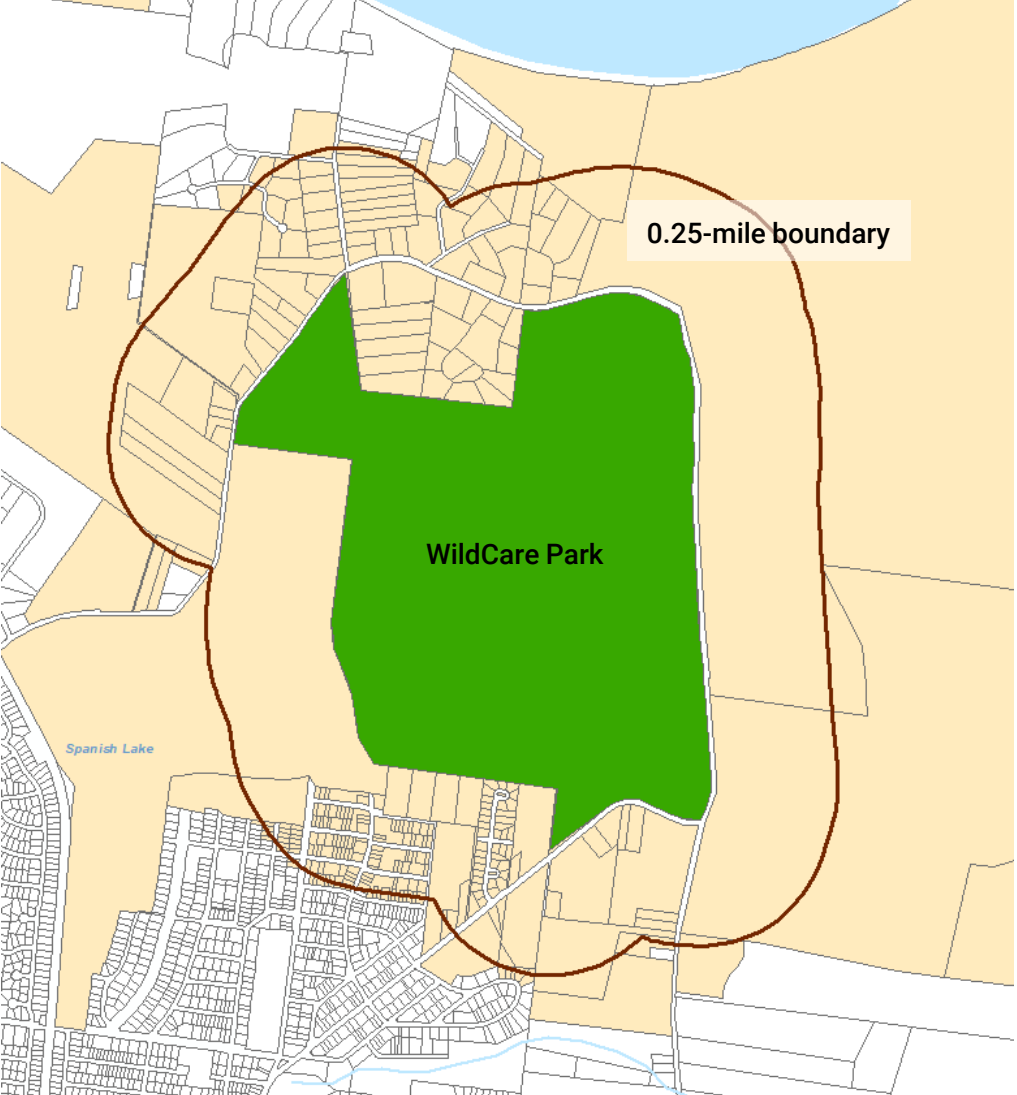
Source: Tourism Economics

# Property Value Impacts

## 0.25-Mile Boundary

The 0.25-mile boundary surrounding WildCare Park contains 311 total parcels. These 311 parcels have a total appraised value of approximately \$40.9 million.

Saint Louis Zoo WildCare Park 0.25-Mile Boundary



Source: Tourism Economics

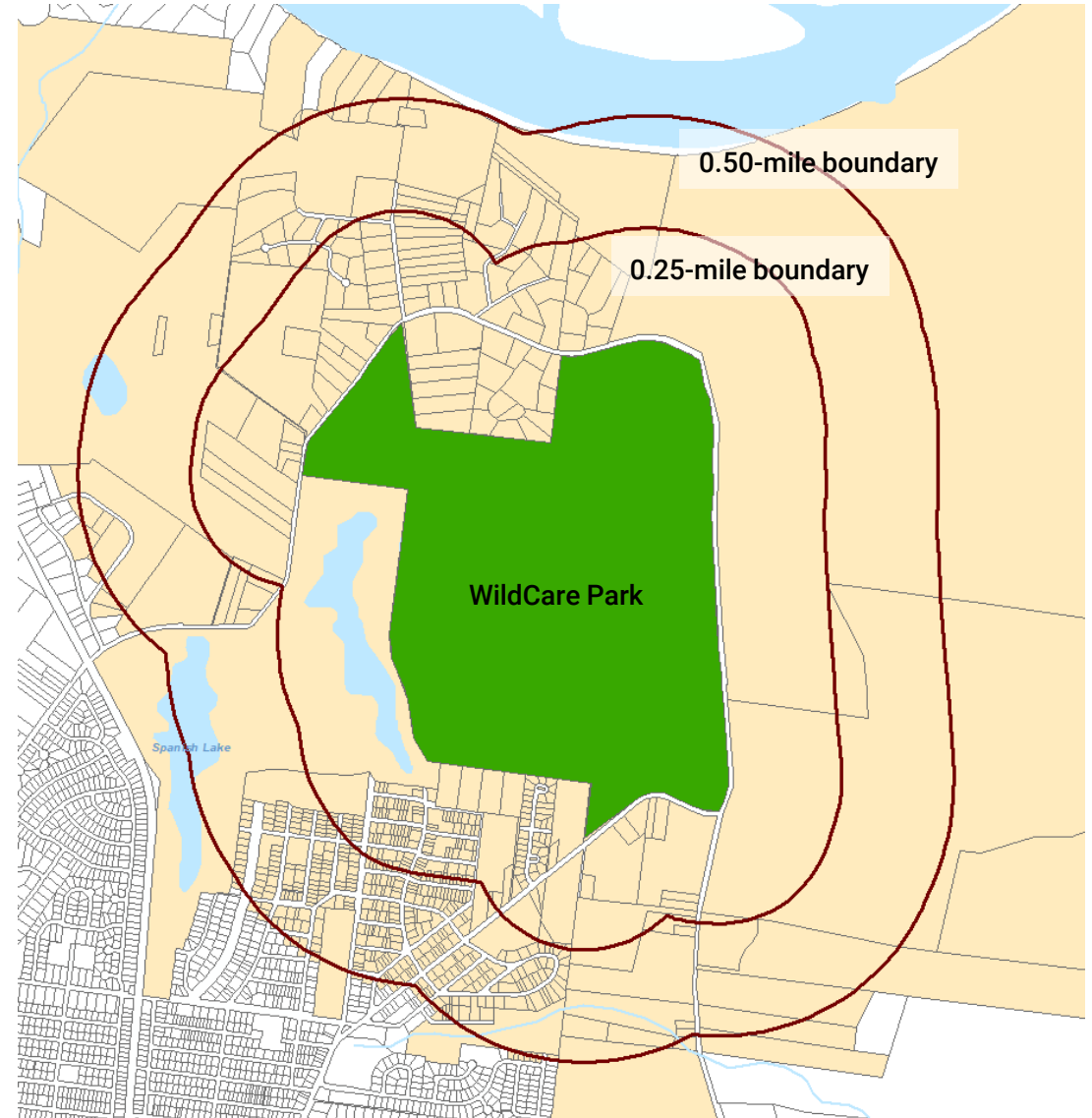
# Property Value Impacts

## 0.50-Mile Boundary

The 0.50-mile boundary surrounding WildCare Park contains 708 total parcels. These 708 parcels have a total appraised value of approximately \$73.4 million.

There are 397 parcels between 0.25 miles and 0.50 miles from WildCare Park. These 397 parcels have a total appraised value of \$32.5 million.

Saint Louis Zoo WildCare Park 0.25-Mile and 0.50-Mile Boundaries



Source: Tourism Economics

# Property Value Impacts

## 1.00-Mile Boundary

The 1.00-mile boundary surrounding WildCare Park contains 2,274 total parcels. These 2,274 parcels have a total appraised value of approximately \$228.5 million.

There are 1,566 parcels between 0.50 miles and 1.00 miles from WildCare Park. These 1,566 parcels have a total appraised value of \$155.1 million.

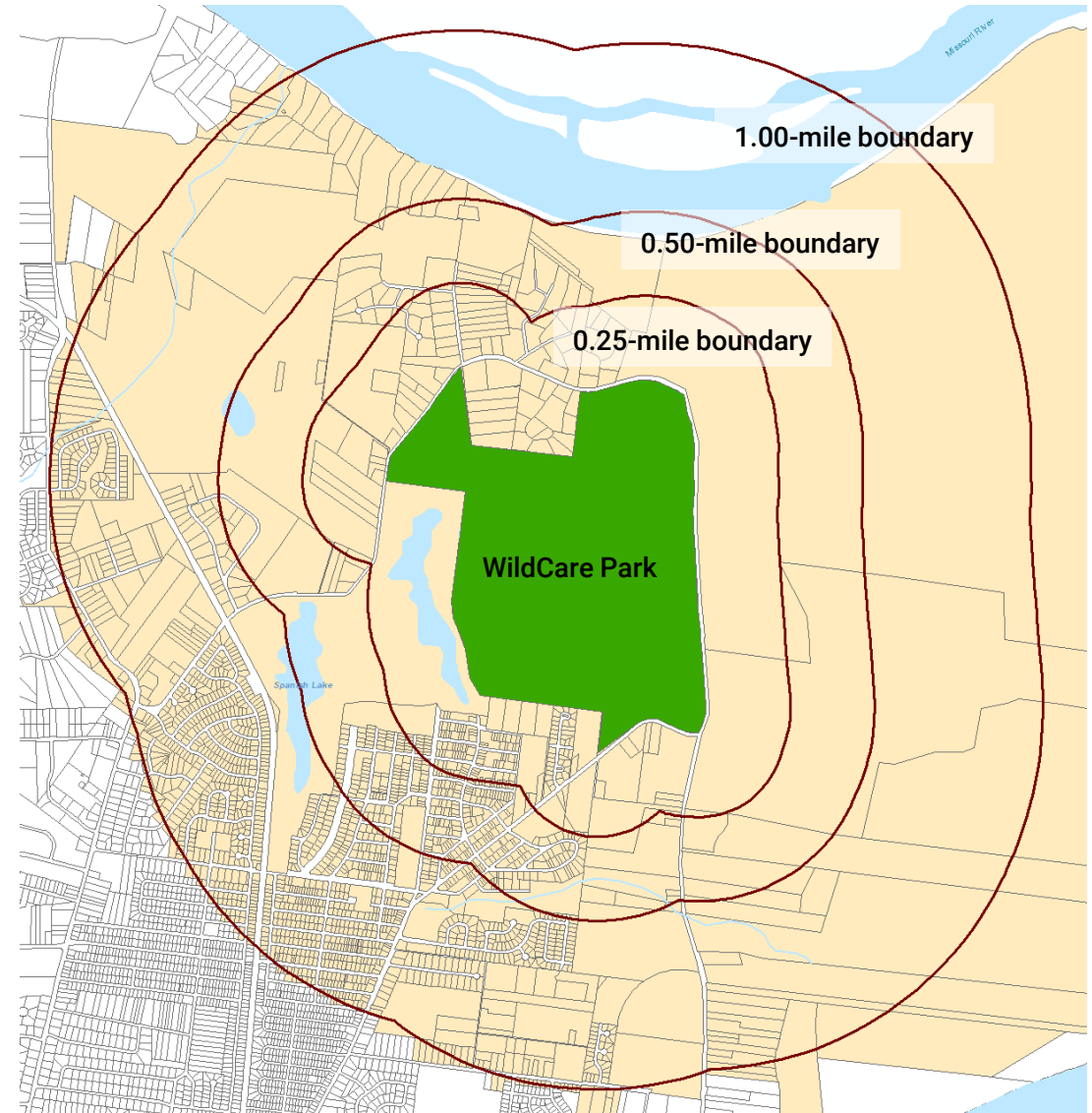
### Saint Louis Zoo WildCare Park: Number of Properties and Total Appraised Value

(\$ and number of parcels)

Boundary	Number of Parcels	Total Appraised Value
0.00 to 0.25 miles	311	\$40,922,600
0.25 to 0.50 miles	397	\$32,520,900
0.50 to 1.00 miles	1,566	\$155,066,400
0.00 to 1.00 miles	2,274	\$228,509,900

Source: Tourism Economics

Saint Louis Zoo WildCare Park 0.25-Mile, 0.50-Mile, and 1.00-Mile Boundaries



Source: Tourism Economics



# Property Value Impacts

## Research and Methodology

Existing literature has shown that attractions and amenities like zoos and green space can generate positive property value impacts, as properties in close proximity to amenities are sometimes highly desirable places to live. Hammer, Coughlin and Horn IV (1974) found that proximity to a park/green space led to a 33% increase in the value of proximate homes. Wachter (2005) estimated that cleaning and greening vacant lots in Philadelphia increased the values of adjacent homes by 30%. Phillips' (2001) research on the Oakland housing market yielded results ranging from +2.2% to +20.0%.

An amenity's positive effect on nearby property values is typically measured as a function of properties' distances to the amenity. This reflects the fact that an amenity's influence on property values dissipates with distance. Based on this relationship, the a zoo's impact on property values is greatest to those properties located immediately next to the zoo and declines as distance from the zoo increases. In terms of a mathematical relationship, a percent change in a property's distance from the zoo results in a corresponding percent change in the increased value of that property.

# Property Value Impacts

## Findings

### Properties within one mile from Sant Louis Zoo WildCare Park will benefit from \$5.9 million in increased appraised value (or \$2,584 per property) upon completion of WildCare Park

As previously outlined, the 311 parcels between 0.00 and 0.25 miles from the zoo have a total current appraised value of \$40.9 million. Tourism Economics estimates that these properties in closest proximity to the zoo will benefit from a 4.0% increase in assessed value. Based on the total appraised value of \$40.9 million, the 4.0% increase attributable to WildCare Park will result in \$1.6 million in increased appraised value, or an increase of \$5,263 per property.

The 397 parcels between 0.25 and 0.50 miles from the zoo have a total appraised value of \$32.5 million. Tourism Economics estimates that these properties between 0.25 and 0.50 miles from the zoo will experience a 3.5% increase in value. Based on the total appraised value of \$32.5 million, the 3.5% increase attributable to WildCare Park will result in \$1.1 million in increased appraised value, or an increase of \$2,867 per property.

The 1,566 parcels between 0.50 and 1.00 miles from the zoo have a total appraised value of \$155.1 million. Tourism Economics estimates that these properties between 0.50 and 1.00 miles from the zoo will experience a 2.0% increase in value. Based on the total appraised value of \$155.1 million, the 2.0% increase in value attributable to WildCare Park will result in \$3.1 million in increased appraised value, or an increase of \$1,980 per property.

### Saint Louis Zoo WildCare Park: Number of Properties and Total Appraised Value (amounts as indicated)

Boundary	Number of Parcels	Total Appraised Value	Estimated Increase in Appraised Value (%)	Estimated Increase in Appraised Value (\$)	Average Increase per Property
0.00 to 0.25 miles	311	\$40,922,600	4.0%	\$1,636,904	\$5,263
0.25 to 0.50 miles	397	\$32,520,900	3.5%	\$1,138,232	\$2,867
0.50 to 1.00 miles	1,566	\$155,066,400	2.0%	\$3,101,328	\$1,980
0.00 to 1.00 miles	2,274	\$228,509,900	2.6%	\$5,876,464	\$2,584

Source: Tourism Economics

Taken together, the 2,274 parcels between 0.00 and 1.00 miles from WildCare Park have a current appraised value of \$228.5 million. Tourism Economics estimates that WildCare park will result in a 2.6% increase in these properties' aggregate appraised value, resulting in a \$5.9 million increase in appraised value, or an average of \$2,584 per property.

# 9 Community Health Impacts



# Community Health Impacts

## Background and Methodology

In addition to positive economic and real estate impacts, WildCare Park will play a key role in providing positive health impacts for its many users. While obesity and weight are growing problems in the US, outdoor amenities offer easy access to low impact exercise on a daily basis. Literature has shown that access to recreational amenities and attractions like zoos drives increased exercise, resulting in positive health benefits. As users exercise, they improve their overall health, which ultimately leads to reduced health care costs, as well as reduced worker's compensation claims.

Tourism Economics estimated the potential recreation value of WildCare Park based on the Unit Day Value (UDV) methodology utilized by the Federal government. The UDV methodology assumes that consumers value recreation and relies on surveys to estimate consumers' willingness to pay for certain recreation uses such as visiting zoos or green space. The U.S. Army Corps of Engineers publishes estimates of the dollar values associated with various types and quality levels of recreation activities based on consumers' willingness to pay.

Tourism Economics' estimates of the aggregate benefit of the recreation opportunities provided by WildCare Park are based on UDV data for FY 2022 and estimated visitation levels at WildCare Park and are outlined in the equations below:

Unit Day Value = Consumers' willingness to pay for recreation

WildCare Park Visitation \* UDV = Aggregate Annual Recreation Benefit

# Community Health Impacts

## Unit Day Values

As previously outlined, the Unit Day Value methodology assumes consumers place certain dollar values on recreation based on recreation type and level of quality. Tourism Economics applies Unit Day Values for “General Recreation Values”\* since general recreation values are most applicable to WildCare Park.

Point Values in the accompanying table indicate the values or quality that visitors assign to a given recreational activity. Tourism Economics assumes that visitors will view WildCare Park as a high-quality recreation option, representing a point value of 90 in the accompanying table.

Based on the use of Unit Day Values for General Recreation, as well as a point value of 90 based on visitors perception of WildCare Park, the UDV utilized in the analysis is \$12.94, as shown in the accompanying table.

\* The U.S. Army Corp of Engineers also provides recreation values for other activities such as general fishing, hunting, and other specialized recreation activities that are not applicable to WildCare Park.

**Unit Day Values for Recreation, FY 2022**  
(point values and dollars)

Point Values	General Recreation Values
0	\$4.50
10	\$5.35
20	\$5.91
30	\$6.75
40	\$8.44
50	\$9.57
60	\$10.41
70	\$10.97
80	\$12.10
90	\$12.94
100	\$13.50

Source: U.S. Army Corp of Engineers: Unit Day values for Recreation for Fiscal Year 2022

# Community Health Impacts

## Estimated Recreation Value of WildCare Park

Based on an estimated annual average of 421,900 visitors to WildCare Park, as well as the recreation value of \$12.94 , the total estimated recreation value for annual trips to WildCare Park will amount to nearly \$5.5 million.

It is important to note that, in addition to the estimated recreation value for annual trips, WildCare Park will provide access to recreational activities to a much larger portion of users compared to the property's previous use a private golf course.

### Annual Recreation Value for Annual Trips to WildCare Park

(point values and dollars)

Site	Estimated Annual Trips	Recreation Value (UDV)	Estimated Recreation Value for Annual Trips
WildCare Park	421,900	\$12.94	\$5,459,386

Source: Tourism Economics, U.S. Army Corp of Engineers

# 10 Business Impacts

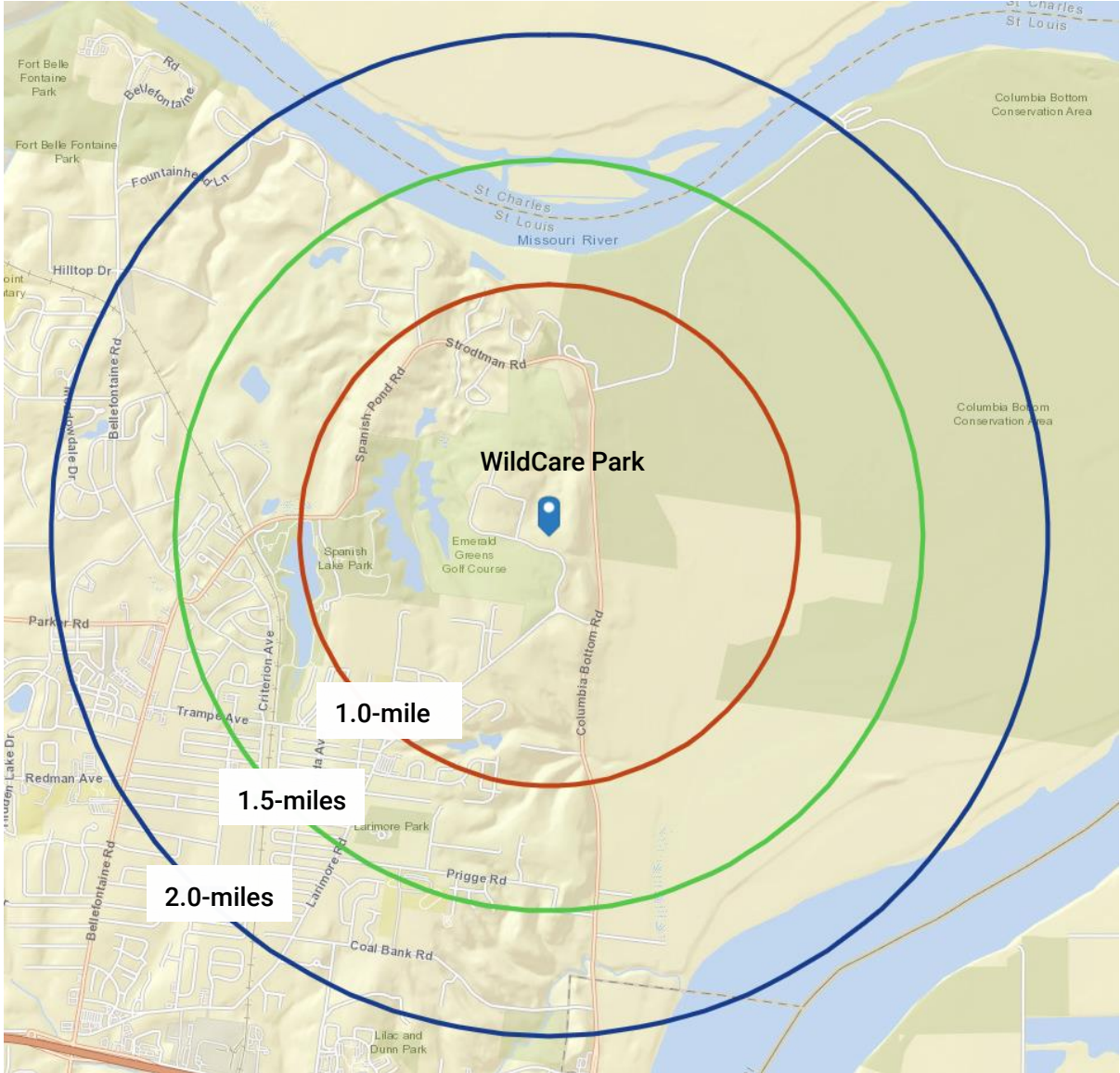


# Business Impacts

## Background and Methodology

Tourism Economics compiled data on local businesses immediately surrounding the WildCare Park site.

1.0-mile, 1.5-mile, and 2.0-mile Boundaries from WildCare Park





# Business Impacts

## Summary Business Data

Tourism Economics compiled data on local businesses immediately surrounding the WildCare Park site.

The 1.0-mile boundary from WildCare Park contains nine total businesses with 134 employees.

The 1.5-mile boundary from WildCare Park contains 37 businesses with 521 total employees.

The 2.0-mile boundary from WildCare Park contains 92 businesses with 1,165 total businesses.

The table on the following page provides detailed breakdowns of businesses and employees, by industry, surrounding WildCare Park.

### Annual Recreation Value for Annual Trips to WildCare Park

(point values and dollars)

	1.0-Mile	1.5-Miles	2.0-Miles
<b>Total Businesses</b>	9	37	92
<b>Total Employees</b>	134	531	1,165
<b>Total Residential Population</b>	1,280	4,488	10,577
<b>Employee/ Residential Population Ratio (per 100 Residents)</b>	10	12	11

Source: ESRI & Data Axle, Inc.

# Business Impacts

## Business Data by Industry

### Businesses Surrounding WildCare Park, by Industry

(number and percent of businesses and employees)

	1.0-Mile				1.5-Miles				2.0-Miles			
	Businesses		Employees		Businesses		Employees		Businesses		Employees	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture & Mining	1	0.0%	3	2.2%	2	5.4%	15	2.8%	2	2.2%	21	1.8%
Construction	0	0.0%	2	1.5%	1	2.7%	8	1.5%	4	4.3%	23	2.0%
Manufacturing	0	0.0%	0	0.0%	0	0.0%	2	0.4%	2	2.2%	34	2.9%
Transportation	0	0.0%	0	0.0%	1	2.7%	4	0.8%	2	2.2%	19	1.6%
Communication	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	1.1%	3	0.3%
Wholesale Trade	0	0.0%	2	1.5%	0	0.0%	9	1.7%	1	1.1%	13	1.1%
Retail Trade Summary	0	0.0%	1	0.7%	5	13.5%	30	5.6%	14	15.2%	101	8.7%
General Merchandise Stores	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	1.1%	13	1.1%
Food Stores	0	0.0%	0	0.0%	2	5.4%	9	1.7%	4	4.3%	18	1.5%
Auto Dealers & Gas Stations	0	0.0%	0	0.0%	0	0.0%	0	0.0%	2	2.2%	11	0.9%
Apparel & Accessory Stores	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	1.1%	7	0.6%
Eating & Drinking Places	0	0.0%	1	0.7%	3	8.1%	20	3.8%	5	5.4%	41	3.5%
Finance, Insurance, Real Estate Summary	0	0.0%	0	0.0%	2	5.4%	4	0.8%	6	6.5%	37	3.2%
Banks, Savings & Lending Institutions	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	2	0.2%
Real Estate, Other Investment Offices	0	0.0%	0	0.0%	2	5.4%	4	0.8%	5	5.4%	35	3.0%
Services Summary	7	77.8%	63	47.0%	20	54.1%	183	34.5%	48	52.2%	482	41.4%
Automotive Services	0	0.0%	0	0.0%	2	5.4%	5	0.9%	5	5.4%	20	1.7%
Movies & Amusements	1	11.1%	1	0.7%	1	2.7%	1	0.2%	3	3.3%	5	0.4%
Health Services	1	11.1%	9	6.7%	3	8.1%	29	5.5%	5	5.4%	48	4.1%
Education Institutions & Libraries	1	11.1%	18	13.4%	1	2.7%	41	7.7%	4	4.3%	173	14.8%
Other Services	4	44.4%	35	26.1%	12	32.4%	106	20.0%	31	33.7%	235	20.2%
Government	1	11.1%	62	46.3%	3	8.1%	265	49.9%	4	4.3%	369	31.7%
Unclassified Establishments	0	0.0%	1	0.7%	2	5.4%	12	2.3%	7	7.6%	64	5.5%
<b>Totals</b>	<b>9</b>	<b>100.0%</b>	<b>134</b>	<b>100.0%</b>	<b>37</b>	<b>100.0%</b>	<b>531</b>	<b>100.0%</b>	<b>92</b>	<b>100.0%</b>	<b>1,165</b>	<b>100.0%</b>

Source: ESRI & Data Axle, Inc.

# About Tourism Economics

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of the travel sector with proven economic tools to answer the most important questions facing our clients. More than 500 companies, associations, and destination work with Tourism Economics every year as a research partner. We bring decades of experience to every engagement to help our clients make better marketing, investment, and policy decisions. Our team of highly-specialized economists deliver:

- Global travel data-sets with the broadest set of country, city, and state coverage available
- Travel forecasts that are directly linked to the economic and demographic outlook for origins and destinations
- Economic impact analysis that highlights the value of visitors, events, developments, and industry segments
- Policy analysis that informs critical funding, taxation, and travel facilitation decisions
- Market assessments that define market allocation and investment decisions

Tourism Economics operates out of regional headquarters in Philadelphia and Oxford, with offices in Belfast, Buenos Aires, Dubai, Frankfurt, and Ontario.

Oxford Economics is one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC, we employ over 250 full-time staff, including 150 professional economists, industry experts and business editors—one of the largest teams of macroeconomists and thought leadership specialists.

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## Our Mission

The mission of the Saint Louis Zoo is to conserve animals and their habitats through animal management, research, recreation, and educational programs that encourage the support and enrich the experience of the public.

