



## Presentation to the Prince William Conservation Alliance

June 25, 2019

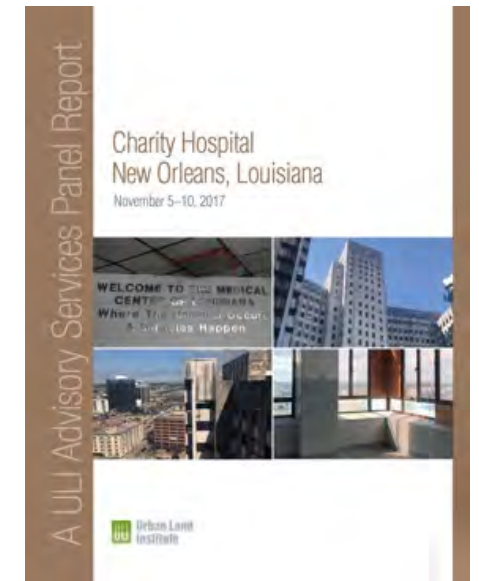
---

Tom Eitler

Urban Land institute

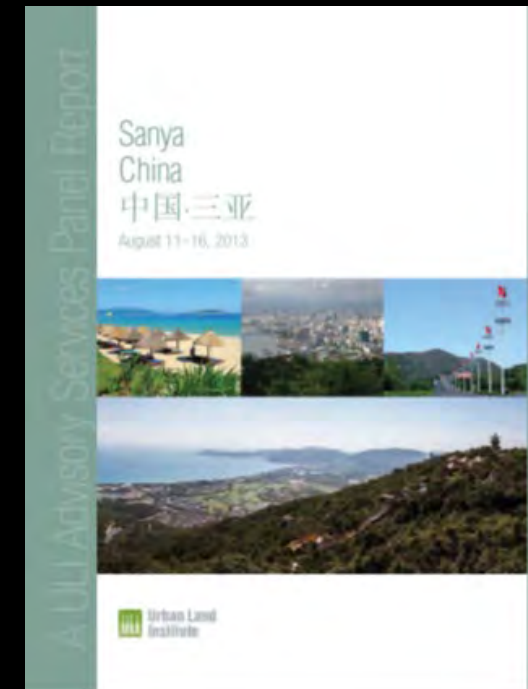
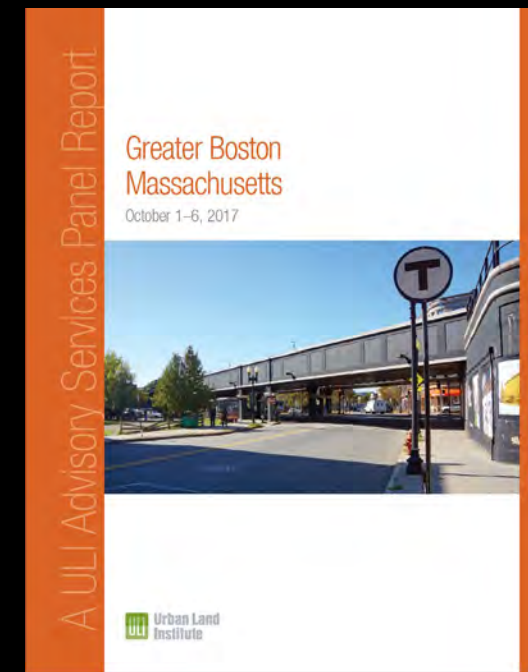
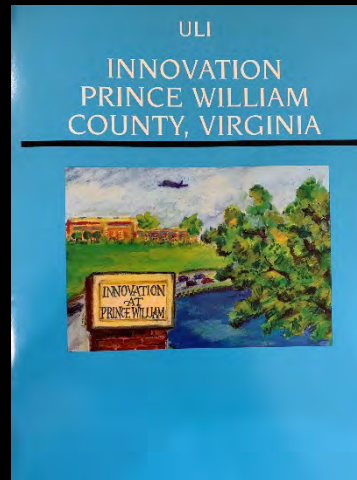
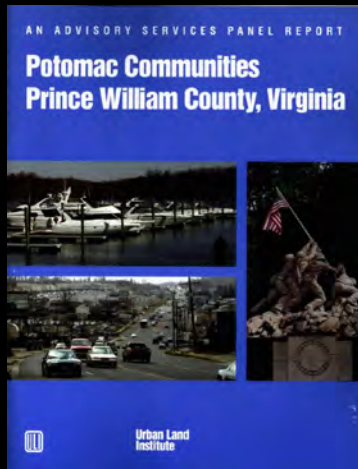
# About the Urban Land Institute

- The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.
- ULI is a membership organization with nearly 45,000 members, worldwide representing the spectrum of real estate development, land use planning and financial disciplines, working in private enterprise and public service.
- What does the Urban Land Institute do?
  - Conduct research
  - Provide a forum for sharing of best practices
  - Write, edit and publish books and magazines
  - Organize and conduct meetings
  - Direct outreach programs
  - Conduct Advisory Services Panels



# The Advisory Services Program

- Since 1947
- 15 - 20 panels a year on a variety of land use subjects
- Provides independent, objective candid advice on important land use and real estate issues
- Concentrated 5 Day effort that brings land use and real estate professional together to provide recommendations on a specific set of issues



# Tonight

# Two Important Subjects

## Rural Area

**The County needs to better understand the land economics that effect the Rural Area**

- Help Identify potential uses
- Guide the county in encouraging realistic uses
- Take advantage of the emerging economies that are redefining the country

## Development Area

**The County needs to make better land use decisions in the Development Area**

- Help compete for millennials and new economy
- Provide a path for redevelopment in the Rt. 1 and Rt. 234 corridors
- Transform the regional image of the county

**Focus on How to Attract and Retain Talent!!**

# New Economy and Real Estate Development

- New forms of transportation
  - Climate change
  - New communication technologies
  - Building healthy places
  - New construction technologies
  - Desire for social cohesion and vibrancy
  - Spending on education
  - Rise in artisanal food & Farm to Table
  - Spending habits of the millennials
- Equitable economic development
  - Ethnic and cultural diversity
  - Energy and waste
  - Biodiversity
  - Gentrification and displacement
  - Homelessness
  - Municipal investment and financing challenges
  - Entertainment and gathering places
  - Regional vs Global competition

**Focus on How to Attract and Retain Talent!!**

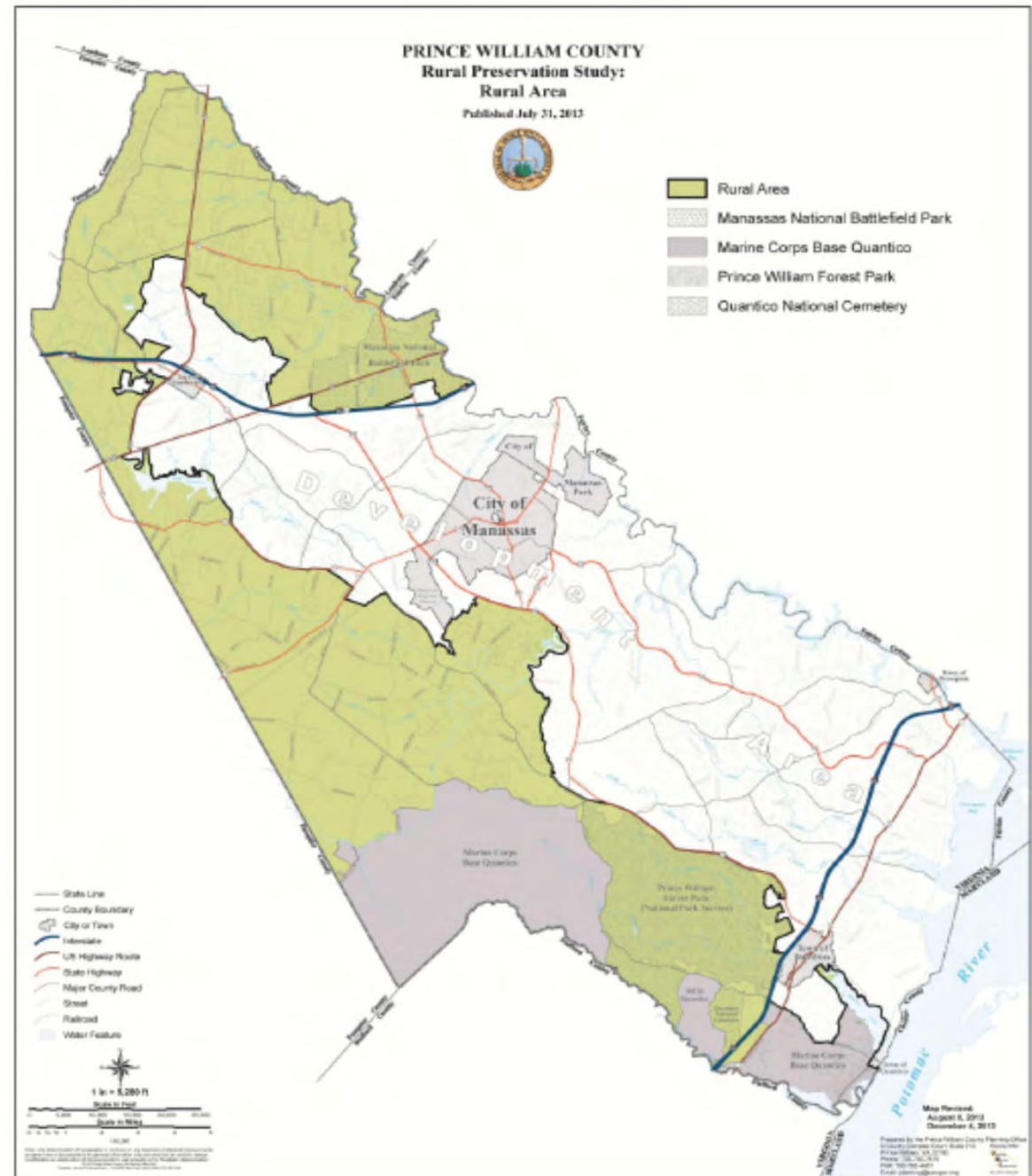


# *Rural Area*

- 120,000 Acres (188 Square Miles):
- 40,000 - *Manassas Battlefield National Park, Prince William Forest Park and the Quantico Marine Corps Base*
- 80,000 – *Rural Area Subject to County Planning Policy*

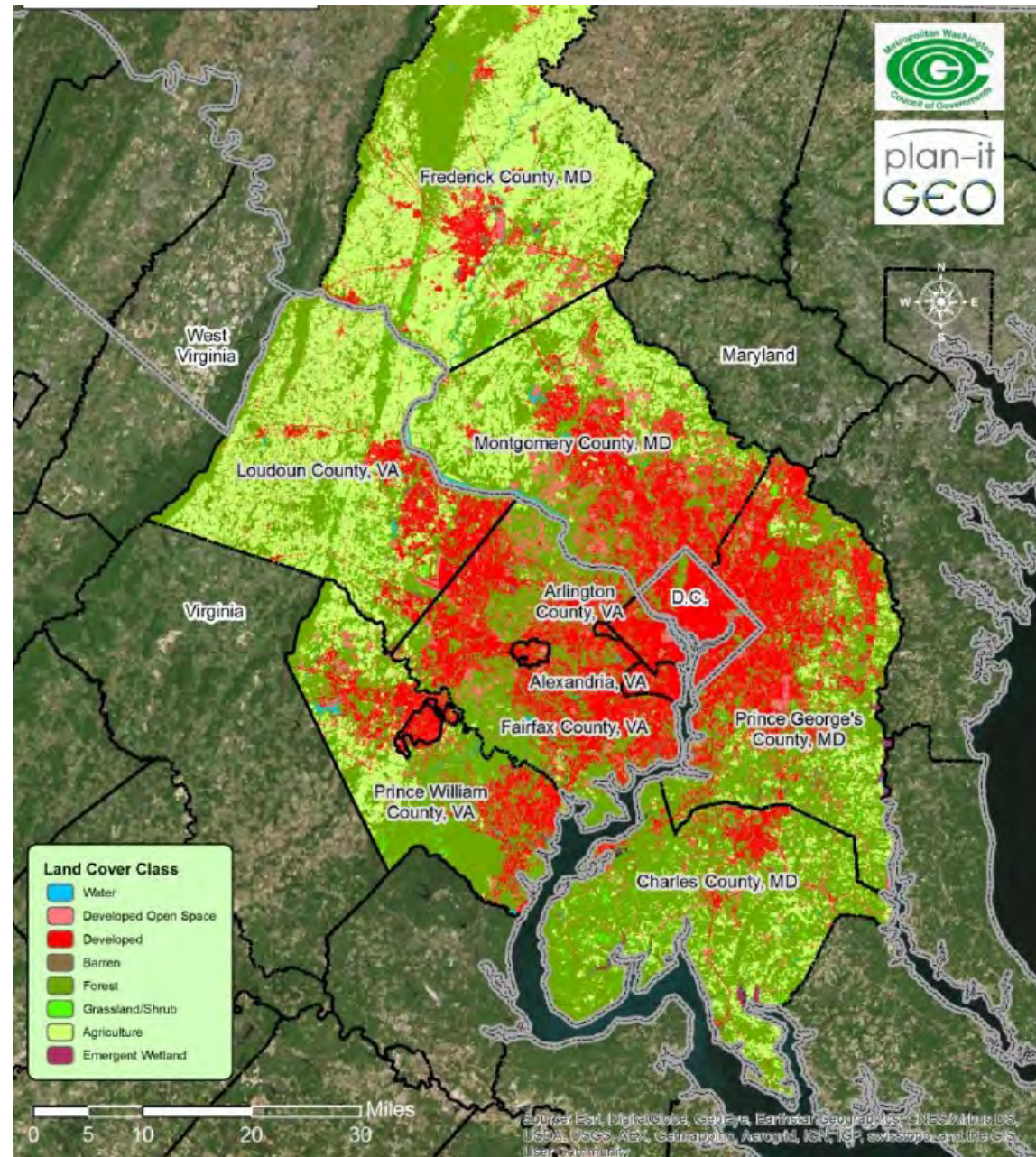


# Rural Area

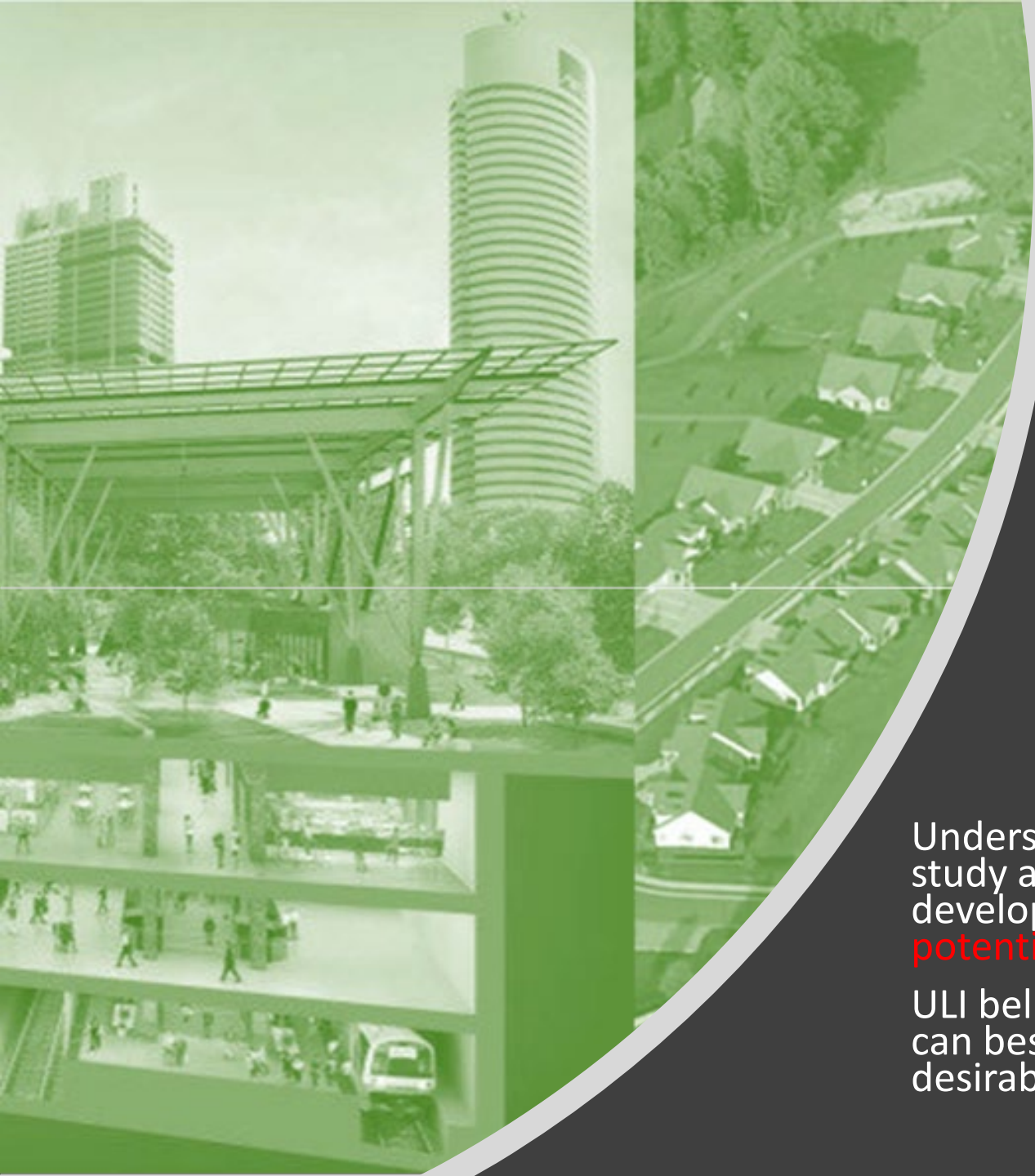


# Regional Perspective

---







# Land Economics

Understanding the socioeconomic trends that are affecting the study area **can help** residents, urban planners, designers, developers, investors, employers and policy makers **identify the potential and pressure for future land uses.**

ULI believes that successful urban planning and land use policy can best be described as public action that generates a desirable, widespread, and sustained private market reaction.

1

### Community Regulations, Goals & Expectations

- Municipality's Plans and Vision = Comprehensive Plan, Zoning, Strategic Plans
- Politics and Social Expectations
- Neighborhood Consultation, Public Engagement and Community Desires

2

### Land Economics -*natural force that self regulates the market economy*

- Current Market
- Supply/Demand
- Market Projections
  
- **Interest Rates/ CAP Rates**

3

### Developer/Investor Goals & Expectations/Limitations

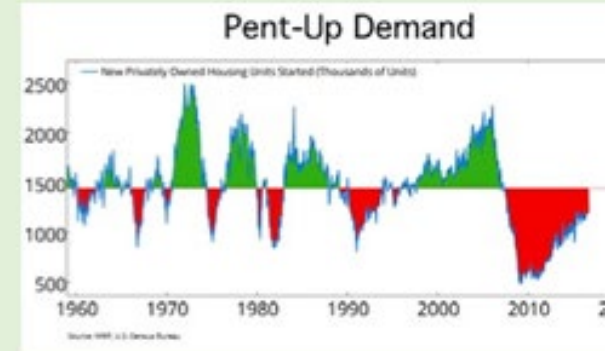
- Investor's Vision and Ideas
- Development Costs
- Financial Plan - Proforma – Cash Flow from Project
- Loans and Financing Sources
- Marketing

Three Pillars in Land Development

# Land Economics

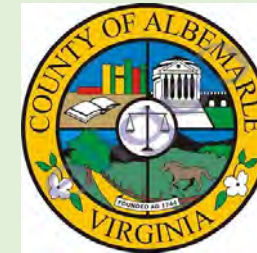
---

- Is there a market for the product?
- Is there pent up demand for a certain type of housing or uses?
- Can you attract that pent-up demand or future projected demand?
- Can you create demand?
- How do you figure this out?



# Sources of Info

- Raw Economic Data
  - US Census, American Community Surveys, and Bureau of Labor Statistics
  - City, County & State demographic services
- Translated Economic Data Services
  - CoStar, Claritas, ESRI, LoopNet, others
- Land Economics Consultants
  - HR&A Advisors, RCLCO, RKG, THK
- Real Estate Services Companies
  - Colliers International, Cushman Wakefield, JLL, CBRE and many more
- Real Estate Development Firms (with their own land economics staff)
  - Peterson Companies, Lerner Enterprises, Hines, Lend-Lease
- Engineering, Design and Professional Services Companies (with their own land economics staff)
  - AECOM, Jacobs, Parsons, Stantec
- Others – Enterprise Community Partners



# Bureau of Labor Statistics

- Raw Economic Data
  - Example



Mid-Atlantic Information Office

SHARE ON: [f](#) [t](#) [in](#) Search Mid-Atlantic Regi

Mid-Atlantic Home | Mid-Atlantic Geography | Mid-Atlantic Subjects | Mid-Atlantic Archives | Contact Mid-Atlantic

Geographic Information > Mid-Atlantic > Table

Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan Statistical Area: Nonfarm employment and labor force data

For Printing: Use smallest text size, landscape orientation, and narrow margins (0.5 inch or less)

Employment data from the Current Employment Statistics program (not seasonally adjusted data, all employees, in thousands)

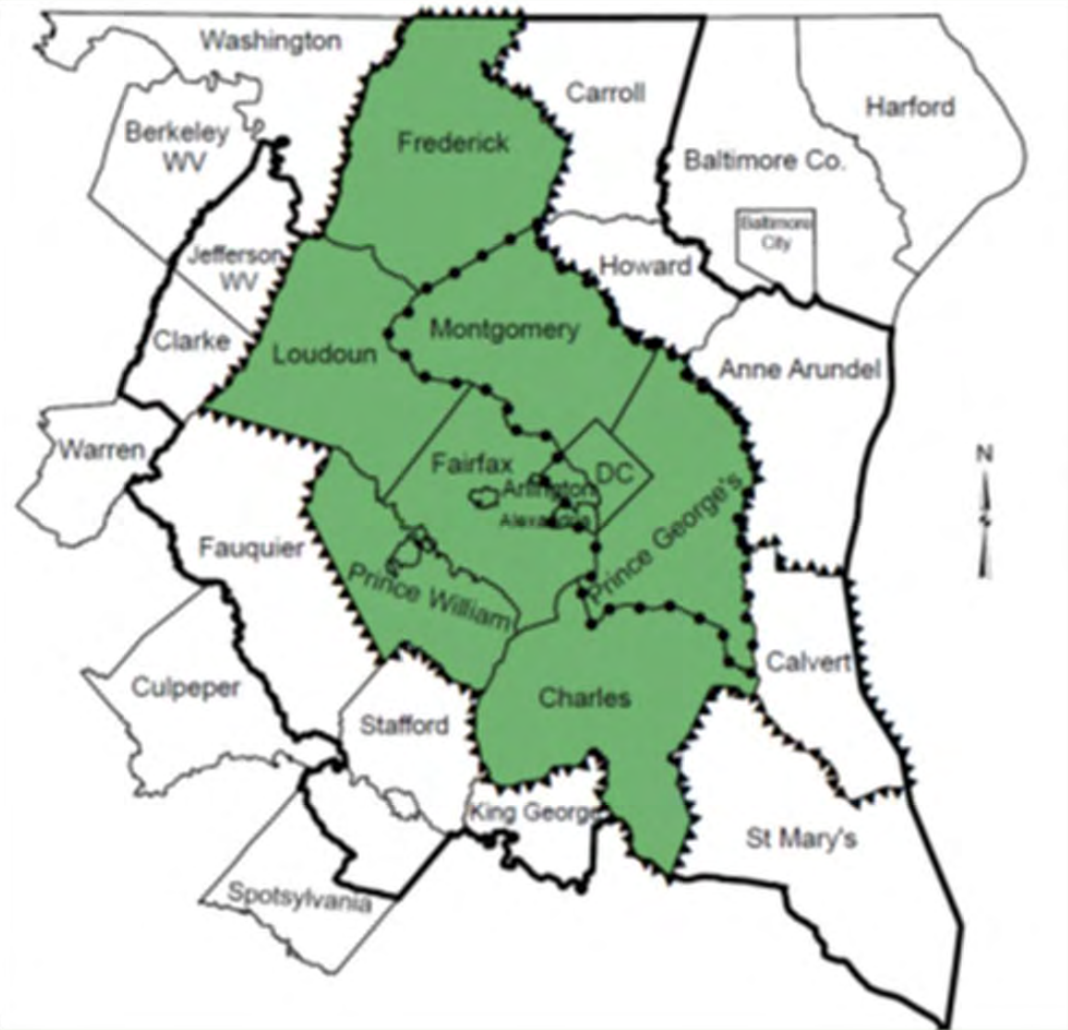
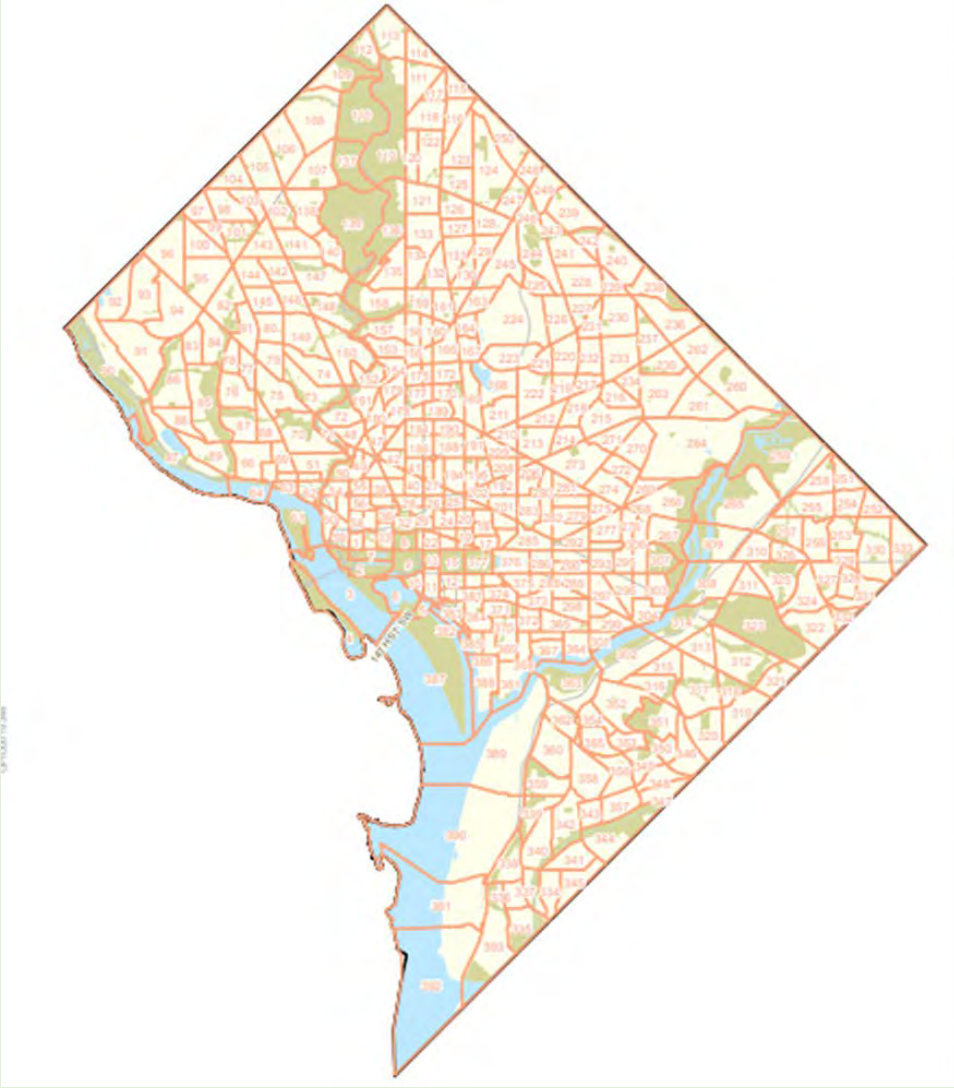
Washington-Arlington-Alexandria, D.C.-Va.-Md.-W.Va. Metropolitan Statistical Area													
Sector	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual Avg
<b>Total Nonfarm</b>													
2018	3,244.3	3,268.9	3,278.8	3,300.4	3,314.7	3,334.0	3,318.8	3,301.1	3,301.4	3,313.2	3,323.8	3,324.6	3,302.0
2019	3,275.9	(P) 3,289.6											
<b>Mining, Logging, &amp; Construction</b>													
2018	154.8	156.1	157.3	158.9	160.0	162.0	164.5	164.6	163.1	162.9	163.0	161.5	160.7
2019	156.6	(P) 155.9											
<b>Manufacturing</b>													
2018	54.4	54.5	54.7	55.1	55.3	56.1	56.2	56.0	55.5	55.2	55.2	55.2	55.3
2019	53.9	(P) 54.0											
<b>Trade, Transportation, &amp; Utilities</b>													
2018	406.3	401.6	401.5	402.4	405.1	407.5	406.8	405.9	404.8	405.2	413.7	418.6	406.6
2019	402.9	(P) 395.8											

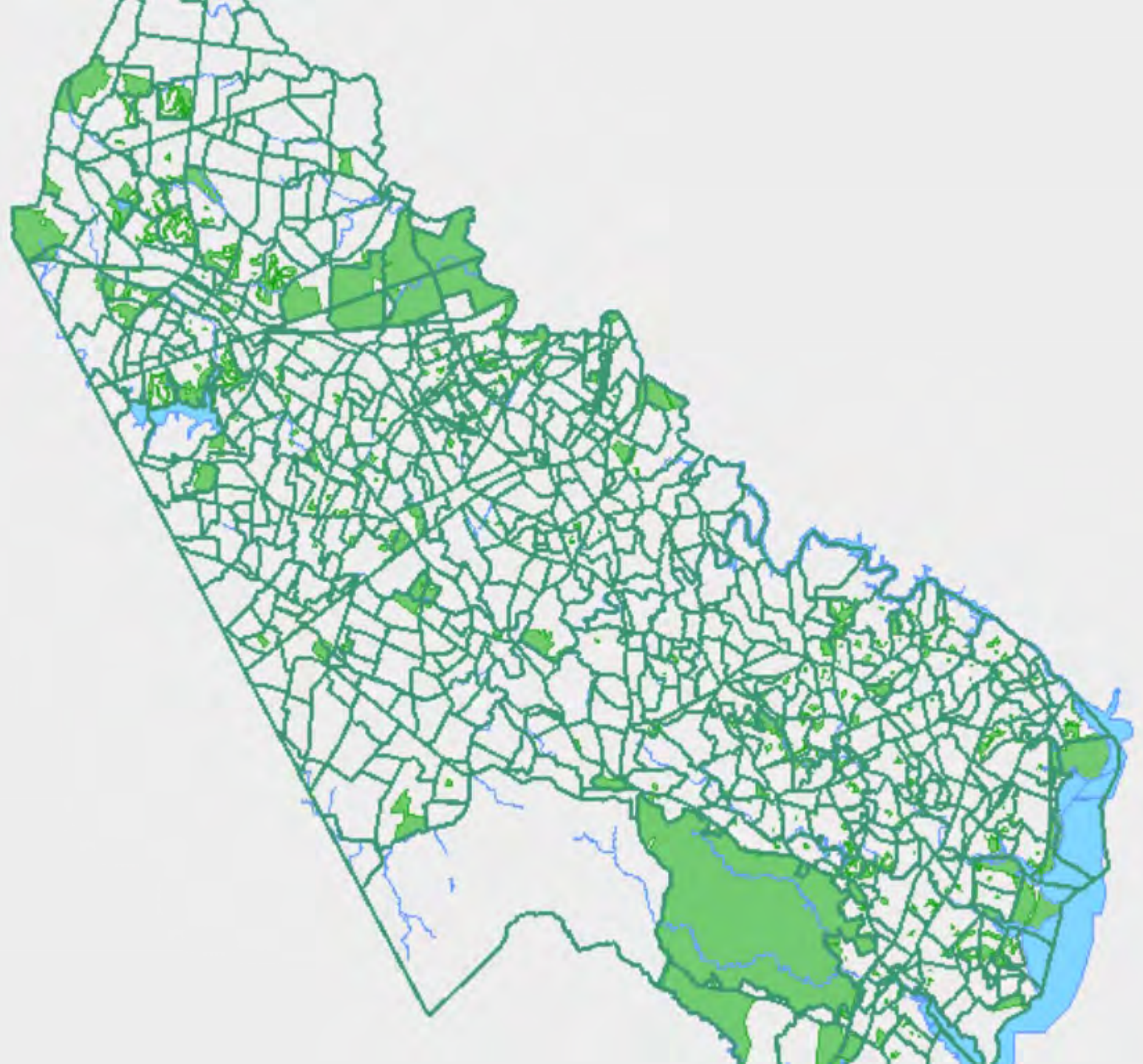
Silver Spring division employment (numbers in thousands)	Dec. 2018	Change from Dec. 2017 to Dec. 2018	
		Number	Percent
Total nonfarm	605.3	9.8	1.6
Mining, logging, and construction	37.4	2.0	5.6
Manufacturing	18.4	0.4	2.2
Trade, transportation, and utilities	78.8	-1.0	-1.3
Information	13.1	0.3	2.3
Financial activities	35.3	-2.2	-5.9
Professional and business services	132.2	3.4	2.6
Education and health services	94.5	1.0	1.1
Leisure and hospitality	55.0	1.0	1.9
Other services	24.7	-0.2	-0.8
Government	115.9	5.1	4.6

Source: U.S. BLS, Current Employment Statistics.

<https://www.bls.gov/eag/>

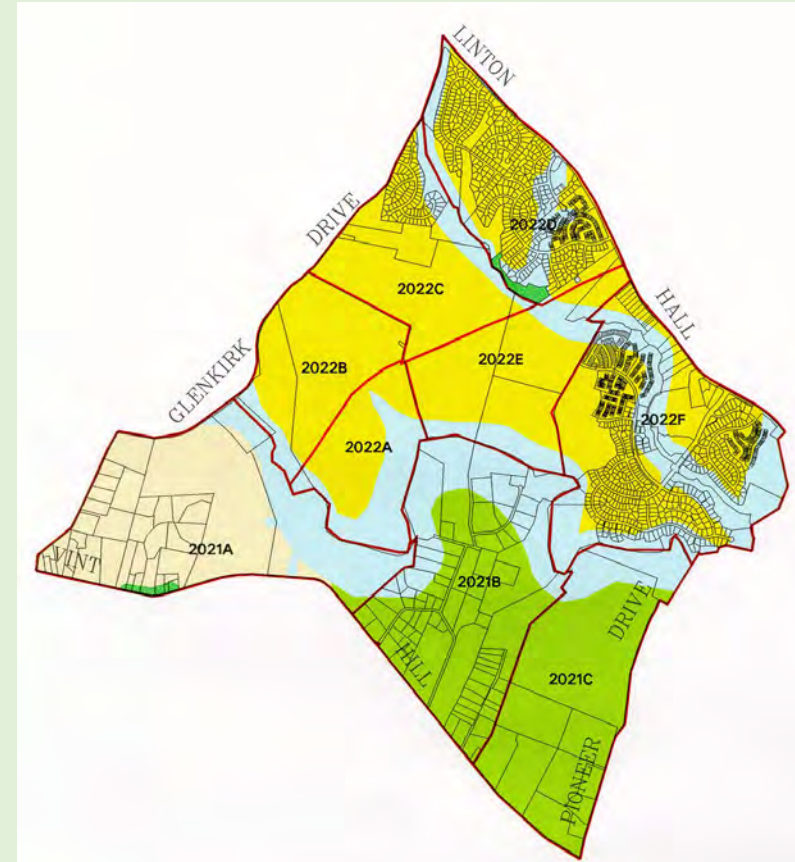
# City and County





# Population and Employment Projections

- GIS layers needed for analysis
  - Parcels
  - Roads
  - Comprehensive Plan (Land Use)
  - Zoning
  - Traffic Analysis Zones (TAZs)
  - Topography/Floodplain/Protected Lands





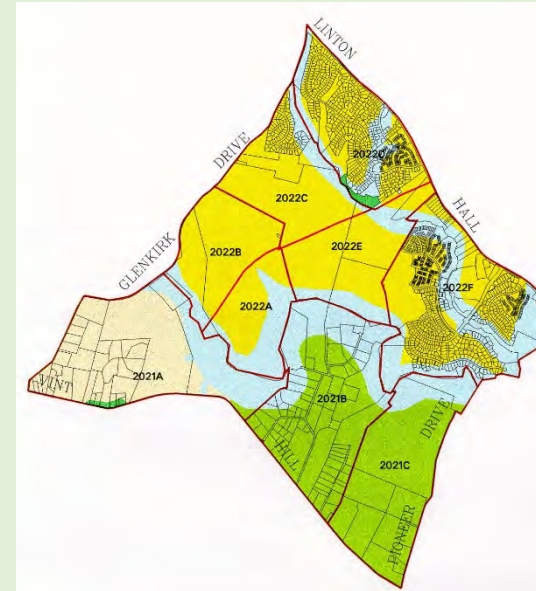
# Small Area Analysis

## Steps to Calculate Population and Employment

- Existing (built units/square footage)
  - Residential – Count exiting units by unit type
  - Non Residential square footage by use type
- Approved but not yet built (zoned property)
  - Residential - Count approved units based on zoning plan, proffers, site plan.
  - Non Residential – Count square footage based on zoning plan, proffers, site plan.
- On Vacant Land not yet zoned
  - Residential – Project units based Comprehensive Plan \*
  - Non Residential Project square footage based on Comprehensive Plan \*
- Projected density and Employment using COG acceptable persons per unit type or employees per square foot of use type

\*Note: Require considerations for reasonable yield based on:

- Adjacent densities
- Unusable land, if not already accounted for in Comprehensive Plan (example: floodplain is already designated in Comprehensive Plan's land use map as Environmental Resource, thus there is no inherent density. These figures are typically adjusted when the parcel is ground-truthed)



	Acreage	Acreage	Zoning	Comp Plan	Total Units	By Unit Type		
						SFD	TH	MF
Total Acreage	1000							
Acreage w/ Existing Units	500				1000	750	150	100
Zoned Acreage	250							
		150	R-10	SRL	450	450		
		45	RT	SRM	360		360	
		5	A-1	ER	0			
Unzoned Acreage	250							
		200	A-1	SRR	133	133		
		25	A-1	RR	5	5		
		25	A-1	ER	0	0		
					1948	1338	510	100

# ESRI Business Analyst (BA)

- Combines demographic, lifestyle, and spending data with map-based analytics to create reports and market insights
- Choose location and market area based on either
  - Concentric Rings
  - Vehicle Travel time or
  - Walking Travel time
- $\frac{1}{2}$ , 1 and 1  $\frac{1}{2}$  miles from development site
  - Population
  - Age
  - Gender, Race, Ethnicity
  - Employment
  - Income & Spending Patterns
  - Psychographics (lifestyle segmentation)
  - Age
  - Residential Projections
  - Retail Demand





## Housing Profile

University of Denver  
2150 E Evans Ave, Denver, Colorado, 80210  
Ring: 0.5 mile radius

Prepared by Esri  
Latitude: 39.67783  
Longitude: -104.96184

### Population

2010 Total Population  
2015 Total Population  
2020 Total Population  
2015-2020 Annual Rate

7,445  
8,068  
8,811  
1.78%

### Households

2015 Median Household Income \$38,240  
2020 Median Household Income \$46,420  
2015-2020 Annual Rate 3.95%

743 people over  
the next 5 years

743 divided by  
1.5 persons per  
unit is 495 Units

Capture rate of  
50%

247 units

# The Leakage/Surplus Factor by Store Type for 3 three concentric rings around target site.

½ Mile

1 Mile

2 Mile

University of Denver  
2150 E Evans Ave, Denver, Colorado, 80202  
Ring: 0.5 mile radius

Prepared by Esri

Summary Demographics						
2013 Population	21,002					
2013 Households	7,284					
2013 Median Household Income	\$41,400					
2013 Per Capita Income	\$30,000					
Category	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Leakage/Surplus Factor	Leakage/Surplus	Number of Businesses
<b>Industry Summary</b>		44,417.72	\$1,286,458	1,139,699	10.4	141
Total Retail Trade and Food & Drink		44,417.72	\$1,286,458	1,139,699	10.4	141
Total Food & Drink		54,45	\$1,323,440	\$1,369,003	0.7	27
Total Food & Drink		600,078				

University of Denver  
2150 E Evans Ave, Denver, Colorado, 80202  
Ring: 1 mile radius

Prepared by Esri

Summary Demographics						
2013 Population	42,002					
2013 Households	14,568					
2013 Median Household Income	\$41,400					
2013 Per Capita Income	\$30,000					
Category	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Leakage/Surplus Factor	Leakage/Surplus	Number of Businesses
<b>Industry Summary</b>		88,835.44	\$2,572,916	2,279,398	10.4	282
Total Retail Trade and Food & Drink		88,835.44	\$2,572,916	2,279,398	10.4	282
Total Food & Drink		108,910	\$2,666,880	\$2,738,006	0.7	54

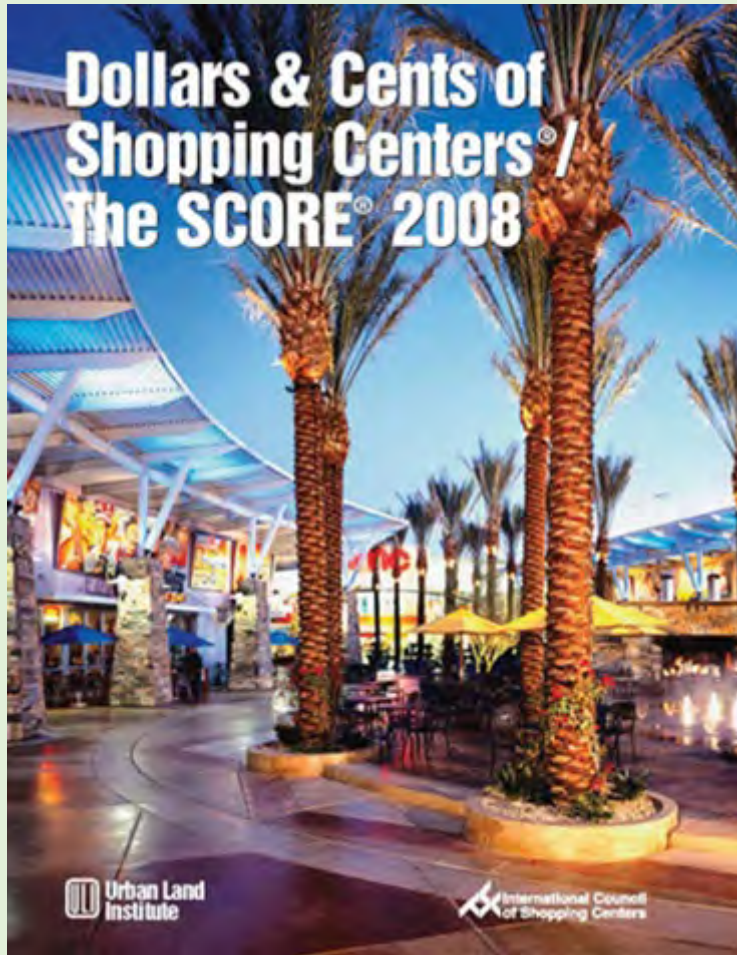
University of Denver  
2550 E Evans Ave, Denver, Colorado, 80202  
Ring: 2 mile radius

Prepared by Esri

Summary Demographics						
2013 Population	84,002					
2013 Households	29,136					
2013 Median Household Income	\$41,400					
2013 Per Capita Income	\$30,000					
Category	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Leakage/Surplus Factor	Leakage/Surplus	Number of Businesses
<b>Industry Summary</b>		177,670.88	\$5,145,832	4,558,796	10.4	564
Total Retail Trade and Food & Drink		177,670.88	\$5,145,832	4,558,796	10.4	564
Total Food & Drink		217,820	\$5,333,760	\$5,476,000	0.7	108

# Industry groups with notable surpluses 1 mile concentric ring

Clothing & Clothing Accessories Stores	448	\$16,863,287	\$3,503,751	\$13,359,536
Clothing Stores	4481	\$11,876,663	\$1,454,300	\$10,422,363
Shoe Stores	4482	\$2,084,868	\$0	\$2,084,868
Jewelry, Luggage & Leather Goods Stores	4483	\$2,901,757	\$1,500,084	\$1,401,673
General Merchandise Stores	452	\$67,578,385	\$837,156	\$66,741,229
Department Stores Excluding Leased Depts.	4521	\$51,074,458	\$0	\$51,074,458
Other General Merchandise Stores	4529	\$16,503,928	\$700,202	\$15,803,726
Food Services & Drinking Places	722	\$41,123,441	\$33,869,063	\$7,254,378
Full-Service Restaurants	7221	\$24,428,641	\$19,686,180	\$4,742,461
Limited-Service Eating Places	7222	\$15,165,320	\$13,985,866	\$1,179,454
Special Food Services	7223	\$777,752	\$0	\$777,752



- General Merchandise
  - Each square foot generates \$300 to \$375 worth of revenue
- Food And Restaurants
  - Each square foot generates \$500 to \$600 worth of revenue
- Specialty
  - Lululemon - \$1,500
  - Apple - \$5,500 per square foot

Dollars per Square Foot of GLA

	Average		Median		Lower Decile		Upper Decile	
	2006	2008	2006	2008	2006	2008	2006	2008
Total tenant sales	\$278.52	\$295.78	\$273.22	\$288.25	\$134.47	\$128.67	\$476.93	\$514.06
Total operating receipts	13.70	15.44	13.34	14.79	6.43	7.49	25.08	26.72
Total operating expenses	4.33	4.56	3.88	4.40	1.85	2.08	9.86	8.20
Net operating balance	9.13	10.77	9.12	10.43	3.43	4.15	17.16	20.45

\* See Chapter 2 for explanation of methodology

Clothing Stores

38,170

General Merchandise

190,689

Food Service and Drink

14,508

243,367 Square Feet needed in the entire concentric 1 mile concentric circle

if you think you could capture 25% of that entire amount you get:

38,170X 25%

9,543 of Clothing, Shoe, leather Goods, Luggage Shops

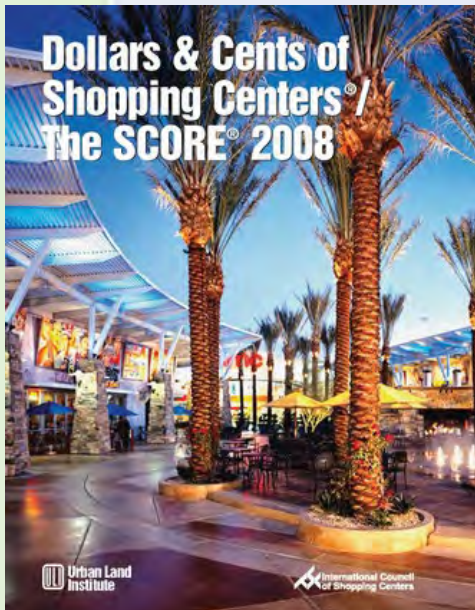
190,689X 25%

47,672 of General Merchandise (Department Stores)

14,508X 25%

3,627 of Restaurants

60,842 Total



# The Market Suggest a Program

- 240 Multi – Family Units
- 60,000 Square feet of Commercial Retail

## Option 1

4 - Two-Story Buildings, each with 60 apartment units and 15,000 sq ft. of retail on ground floor

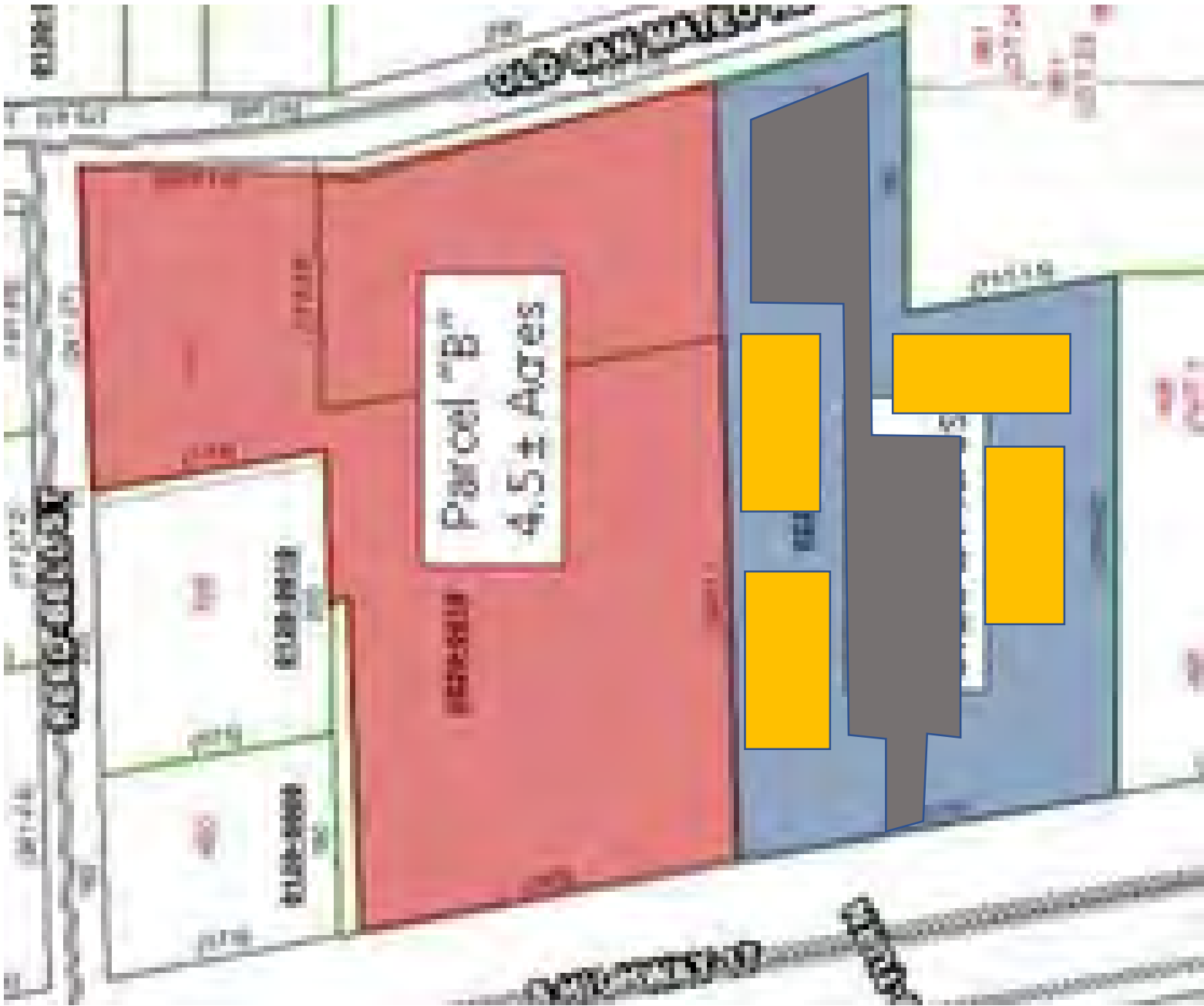


## Option 2

2 - Five-Story Buildings Each with 120 apartment units and 30,000 sq. ft. of retail on ground floor



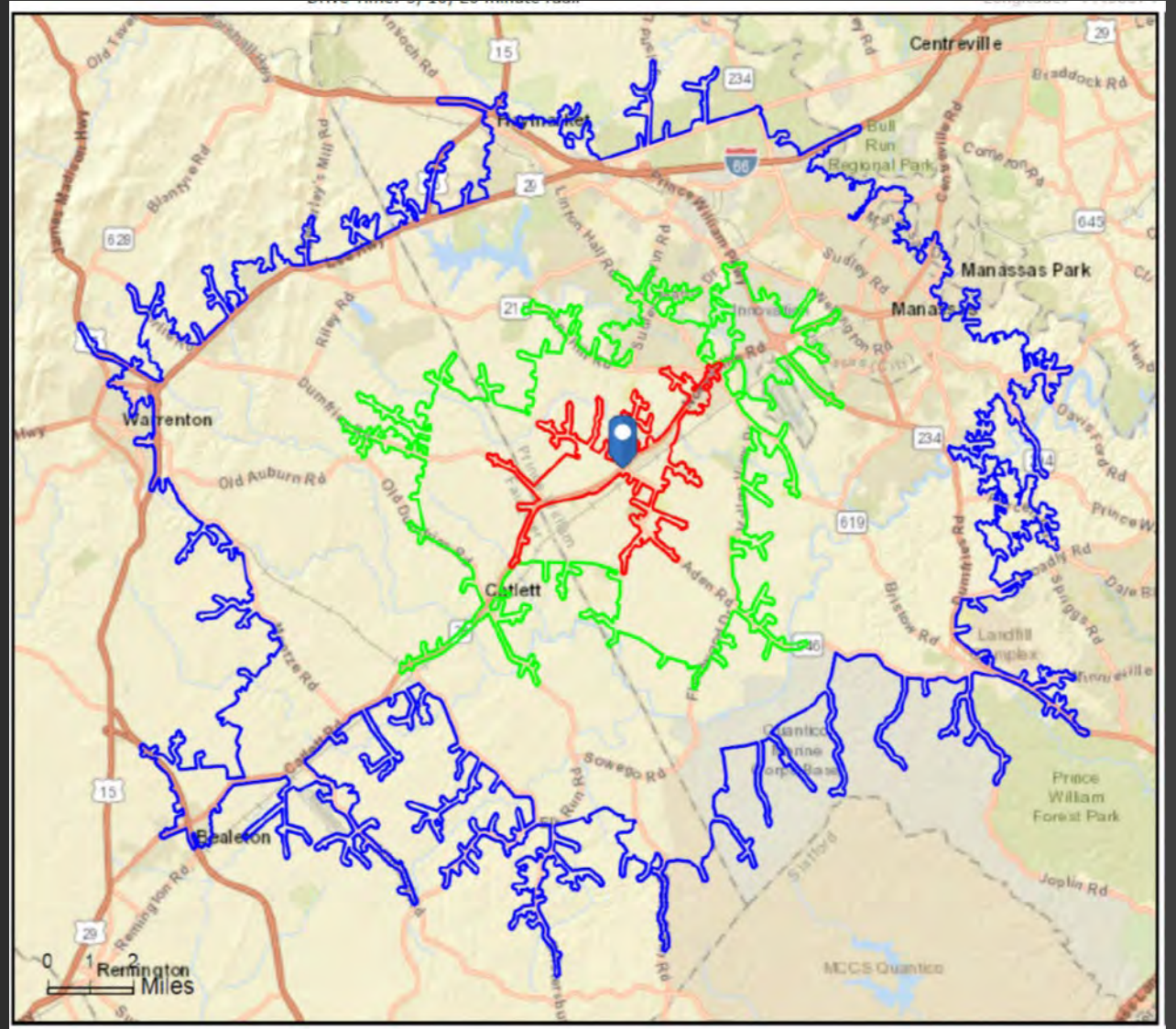






# Drive Times from Nokesville 5, 10 and 20 minute

- Uses ARC GIS Powerful Mapping Application
- Tabulates more than twenty attributes including housing type, housing value, population, age, ethnicity, education levels, income levels etc.
- Presents existing and projects population for 5 Year periods
- Assesses the retail supply and demand based on location, disposable income and existing retail
- Segments and maps population by lifestyle



# 5 Minute Drive Time

- Undersupply of all retail types
- Notable:
  - Food and Beverage
  - Grocery
  - General Merchandise
  - Food and Drinking Places

	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus
2017 Industry Group		(Retail Potential)	(Retail Sales)		Factor
Motor Vehicle & Parts Dealers	441	\$6,641,408	\$1,351,917	\$5,289,491	66.2
Automobile Dealers	4411	\$5,428,117	\$0	\$5,428,117	100.0
Other Motor Vehicle Dealers	4412	\$694,077	\$0	\$694,077	100.0
Auto Parts, Accessories & Tire Stores	4413	\$519,214	\$0	\$519,214	100.0
Furniture & Home Furnishings Stores	442	\$1,222,699	\$448,805	\$773,894	46.3
Furniture Stores	4421	\$680,410	\$0	\$680,410	100.0
Home Furnishings Stores	4422	\$542,288	\$442,321	\$99,967	10.2
Electronics & Appliance Stores	443	\$1,041,240	\$0	\$1,041,240	100.0
Bldg Materials, Garden Equip. & Supply Stores	444	\$2,144,276	\$0	\$2,144,276	100.0
Bldg Material & Supplies Dealers	4441	\$2,004,539	\$0	\$2,004,539	100.0
Lawn & Garden Equip & Supply Stores	4442	\$139,736	\$0	\$139,736	100.0
Food & Beverage Stores	445	\$5,355,007	\$3,073,234	\$2,281,773	27.1
Grocery Stores	4451	\$4,952,706	\$3,053,825	\$1,898,881	23.7
Specialty Food Stores	4452	\$155,988	\$0	\$155,988	100.0
Beer, Wine & Liquor Stores	4453	\$246,313	\$0	\$246,313	100.0
Health & Personal Care Stores	446,4461	\$1,766,894	\$0	\$1,766,894	100.0
Gasoline Stations	447,4471	\$3,004,880	\$0	\$3,004,880	100.0
Clothing & Clothing Accessories Stores	448	\$1,612,100	\$0	\$1,612,100	100.0
Clothing Stores	4481	\$1,078,040	\$0	\$1,078,040	100.0
Shoe Stores	4482	\$235,450	\$0	\$235,450	100.0
Jewelry, Luggage & Leather Goods Stores	4483	\$298,610	\$0	\$298,610	100.0
Sporting Goods, Hobby, Book & Music Stores	451	\$881,855	\$390,054	\$491,801	38.7
Sporting Goods/Hobby/Musical Instr Stores	4511	\$750,842	\$383,066	\$367,776	32.4
Book, Periodical & Music Stores	4512	\$131,013	\$0	\$131,013	100.0
General Merchandise Stores	452	\$5,625,355	\$0	\$5,625,355	100.0
Department Stores Excluding Leased Depts.	4521	\$3,943,048	\$0	\$3,943,048	100.0
Other General Merchandise Stores	4529	\$1,682,307	\$0	\$1,682,307	100.0
Miscellaneous Store Retailers	453	\$1,125,571	\$0	\$1,125,571	100.0
Florists	4531	\$50,737	\$0	\$50,737	100.0
Office Supplies, Stationery & Gift Stores	4532	\$287,993	\$0	\$287,993	100.0
Used Merchandise Stores	4533	\$144,495	\$0	\$144,495	100.0
Other Miscellaneous Store Retailers	4539	\$642,346	\$0	\$642,346	100.0
Nonstore Retailers	454	\$576,520	\$0	\$576,520	100.0
Electronic Shopping & Mail-Order Houses	4541	\$397,268	\$0	\$397,268	100.0
Vending Machine Operators	4542	\$26,634	\$0	\$26,634	100.0
Direct Selling Establishments	4543	\$152,618	\$0	\$152,618	100.0
Food Services & Drinking Places	722	\$3,445,780	\$658,124	\$2,787,656	67.9
Special Food Services	7223	\$48,992	\$0	\$48,992	100.0
Drinking Places - Alcoholic Beverages	7224	\$42,806	\$0	\$42,806	100.0
Restaurants/Other Eating Places	7225	\$3,353,983	\$636,812	\$2,717,171	68.1

# 10 Minute Drive Time

- Undersupply of all retail types
- Notable:
  - Food and Beverage
  - Grocery
  - General Merchandise
  - Food and Drinking Places

	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus
2017 Industry Group		(Retail Potential)	(Retail Sales)		Factor
Motor Vehicle & Parts Dealers	441	\$72,434,835	\$22,931,581	\$49,503,254	51.9
Automobile Dealers	4411	\$59,172,393	\$17,522,228	\$41,650,165	54.3
Other Motor Vehicle Dealers	4412	\$7,520,766	\$1,096,937	\$6,423,829	74.5
Auto Parts, Accessories & Tire Stores	4413	\$5,741,677	\$4,312,415	\$1,429,262	14.2
Furniture & Home Furnishings Stores	442	\$13,512,787	\$9,087,896	\$4,424,891	19.6
Furniture Stores	4421	\$7,510,467	\$1,495,011	\$6,015,456	66.8
Home Furnishings Stores	4422	\$6,002,320	\$7,592,885	-\$1,590,565	-11.7
Electronics & Appliance Stores	443	\$11,512,761	\$22,636,480	-\$11,123,719	-32.6
Bldg Materials, Garden Equip. & Supply Stores	444	\$23,652,132	\$23,399,857	\$252,275	0.5
Bldg Material & Supplies Dealers	4441	\$22,076,912	\$22,961,279	-\$884,367	-2.0
Lawn & Garden Equip & Supply Stores	4442	\$1,575,221	\$438,578	\$1,136,643	56.4
Food & Beverage Stores	445	\$59,078,892	\$58,459,688	\$619,204	0.5
Grocery Stores	4451	\$54,590,525	\$55,799,448	-\$1,208,923	-1.1
Specialty Food Stores	4452	\$1,719,087	\$1,679,740	\$39,347	1.2
Beer, Wine & Liquor Stores	4453	\$2,769,280	\$0	\$2,769,280	100.0
Health & Personal Care Stores	446,4461	\$19,471,898	\$10,344,352	\$9,127,546	30.6
Gasoline Stations	447,4471	\$32,814,425	\$7,308,475	\$25,505,950	63.6
Clothing & Clothing Accessories Stores	448	\$17,998,720	\$916,744	\$17,081,976	90.3
Clothing Stores	4481	\$12,006,170	\$723,282	\$11,282,888	88.6
Shoe Stores	4482	\$2,601,884	\$0	\$2,601,884	100.0
Jewelry, Luggage & Leather Goods Stores	4483	\$3,390,666	\$0	\$3,390,666	100.0
Sporting Goods, Hobby, Book & Music Stores	451	\$9,727,915	\$3,590,874	\$6,137,041	46.1
Sporting Goods/Hobby/Musical Instr Stores	4511	\$8,274,397	\$2,966,034	\$5,308,363	47.2
Book, Periodical & Music Stores	4512	\$1,453,518	\$624,840	\$828,678	39.9
General Merchandise Stores	452	\$62,119,820	\$38,999,570	\$23,120,250	22.9
Department Stores Excluding Leased Depts.	4521	\$43,607,702	\$38,269,856	\$5,337,846	6.5
Other General Merchandise Stores	4529	\$18,512,118	\$729,714	\$17,782,404	92.4
Miscellaneous Store Retailers	453	\$12,321,244	\$6,823,112	\$5,498,132	28.7
Florists	4531	\$596,191	\$0	\$596,191	100.0
Office Supplies, Stationery & Gift Stores	4532	\$3,188,547	\$302,612	\$2,885,935	82.7
Used Merchandise Stores	4533	\$1,595,026	\$202,996	\$1,392,030	77.4
Other Miscellaneous Store Retailers	4539	\$6,941,480	\$6,317,504	\$623,976	4.7
Nonstore Retailers	454	\$6,441,457	\$53,942	\$6,387,515	98.3
Electronic Shopping & Mail-Order Houses	4541	\$4,376,760	\$0	\$4,376,760	100.0
Vending Machine Operators	4542	\$293,517	\$0	\$293,517	100.0
Direct Selling Establishments	4543	\$1,771,180	\$53,942	\$1,717,238	94.1
Food Services & Drinking Places	722	\$38,154,019	\$20,000,548	\$18,153,471	31.2
Special Food Services	7223	\$546,978	\$135,464	\$411,514	60.3
Drinking Places - Alcoholic Beverages	7224	\$477,216	\$284,544	\$192,672	25.3
Restaurants/Other Eating Places	7225	\$37,129,826	\$19,580,540	\$17,549,286	30.9

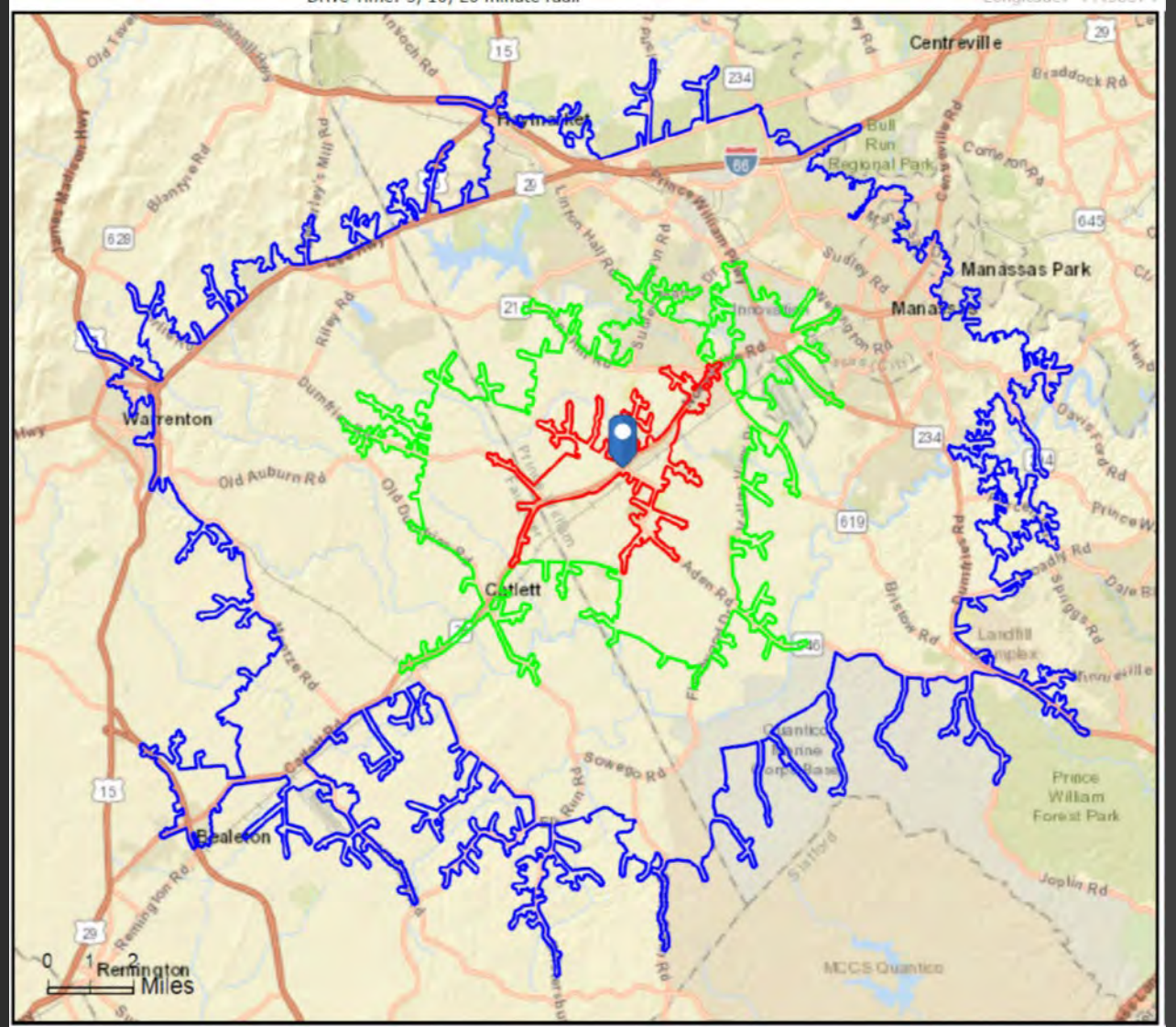
# 20 Minute Drive Time

- Undersupply of all retail types
- Notable:
  - Clothing and Apparel
  - General Merchandise
  - Food and Drinking Places

	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus
2017 Industry Group		(Retail Potential)	(Retail Sales)		Factor
Motor Vehicle & Parts Dealers	441	\$657,284,531	\$699,588,296	-\$42,303,765	-3.1
Automobile Dealers	4411	\$537,670,619	\$564,226,948	-\$26,556,329	-2.4
Other Motor Vehicle Dealers	4412	\$67,092,264	\$56,702,611	\$10,389,653	8.4
Auto Parts, Accessories & Tire Stores	4413	\$52,521,648	\$78,658,736	-\$26,137,088	-19.9
Furniture & Home Furnishings Stores	442	\$121,571,575	\$123,548,490	-\$1,976,915	-0.8
Furniture Stores	4421	\$67,974,827	\$63,662,891	\$4,311,936	3.3
Home Furnishings Stores	4422	\$53,596,749	\$59,885,599	-\$6,288,850	-5.5
Electronics & Appliance Stores	443	\$103,751,100	\$153,272,916	-\$49,521,816	-19.3
Bldg Materials, Garden Equip. & Supply Stores	444	\$209,874,643	\$259,734,823	-\$49,860,180	-10.6
Bldg Material & Supplies Dealers	4441	\$195,362,457	\$254,107,902	-\$58,745,445	-13.1
Lawn & Garden Equip & Supply Stores	4442	\$14,512,185	\$5,626,921	\$8,885,264	44.1
Food & Beverage Stores	445	\$545,571,839	\$658,314,534	-\$112,742,695	-9.4
Grocery Stores	4451	\$504,319,363	\$611,431,251	-\$107,111,888	-9.6
Specialty Food Stores	4452	\$15,903,551	\$24,365,146	-\$8,461,595	-21.0
Beer, Wine & Liquor Stores	4453	\$25,348,926	\$22,518,138	\$2,830,788	5.9
Health & Personal Care Stores	446,4461	\$179,489,797	\$157,802,606	\$21,687,191	6.4
Gasoline Stations	447,4471	\$301,873,941	\$190,412,206	\$111,461,735	22.6
Clothing & Clothing Accessories Stores	448	\$163,567,875	\$97,909,725	\$65,658,150	25.1
Clothing Stores	4481	\$109,331,066	\$66,486,549	\$42,844,517	24.4
Shoe Stores	4482	\$23,496,606	\$19,725,902	\$3,770,704	8.7
Jewelry, Luggage & Leather Goods Stores	4483	\$30,740,203	\$11,697,275	\$19,042,928	44.9
Sporting Goods, Hobby, Book & Music Stores	451	\$87,789,756	\$74,794,404	\$12,995,352	8.0
Sporting Goods/Hobby/Musical Instr Stores	4511	\$74,459,232	\$66,003,508	\$8,455,724	6.0
Book, Periodical & Music Stores	4512	\$13,330,524	\$8,790,895	\$4,539,629	20.5
General Merchandise Stores	452	\$566,997,963	\$573,005,761	-\$6,007,798	-0.5
Department Stores Excluding Leased Depts.	4521	\$396,737,598	\$362,468,244	\$34,269,354	4.5
Other General Merchandise Stores	4529	\$170,260,364	\$210,537,517	-\$40,277,153	-10.6
Miscellaneous Store Retailers	453	\$112,392,971	\$91,860,580	\$20,532,391	10.1
Florists	4531	\$5,578,336	\$1,131,582	\$4,446,754	66.3
Office Supplies, Stationery & Gift Stores	4532	\$29,042,520	\$29,823,185	-\$780,665	-1.3
Used Merchandise Stores	4533	\$14,370,355	\$9,670,724	\$4,699,631	19.5
Other Miscellaneous Store Retailers	4539	\$63,401,760	\$51,235,089	\$12,166,671	10.6
Nonstore Retailers	454	\$59,024,593	\$64,256,707	-\$5,232,114	-4.2
Electronic Shopping & Mail-Order Houses	4541	\$39,525,582	\$59,209,660	-\$19,684,078	-19.9
Vending Machine Operators	4542	\$2,716,041	\$151,205	\$2,564,836	89.5
Direct Selling Establishments	4543	\$16,782,970	\$4,895,842	\$11,887,128	54.8
Food Services & Drinking Places	722	\$346,726,518	\$306,944,443	\$39,782,075	6.1
Special Food Services	7223	\$4,934,173	\$745,919	\$4,188,254	73.7
Drinking Places - Alcoholic Beverages	7224	\$4,381,458	\$904,901	\$3,476,557	65.8
Restaurants/Other Eating Places	7225	\$337,410,886	\$305,293,623	\$32,117,263	5.0

# Suggested Target

- Food and Drinking Places
  - Potential for 32,000 Square feet
  - With a reasonable capture rate of 25% = 11,200 square feet
- Small Format Green Grocery
  - Potential for 6,000 square feet



# Food and Drinking Places



Pro Renata Farm Brewery,  
Crozet VA  
4,000 sq. ft.



Blue Mountain Brewery,  
Afton, VA  
7,700 sq. ft.



Blue Toad Distillery  
Avon, VA  
4,000 sq. ft.



Pollack Vineyard  
Greenwood, VA  
7,500 sq. ft.



Old Bust Head Brewery  
Vint Hill, VA  
12,000 sq. ft.



Villaggio  
Clifton, VA  
5,000 sq. ft.



La Grange Winery  
Antioch, VA  
4,000 sq. ft.



Hammerdown BBQ  
Loudoun, VA  
4,000 sq. ft.



# Small Format Stores



ALDI



Little House Green Grocery  
Richmond, VA  
2,000 sq. ft.



Country Market



General Store



Dollar General  
9,000

# Other Rural Uses



Farm Retail



Aquaponics



Greenhouses



Farm Machinery



Markets



Lodging/B&B



Growhaus, Denver



Event Venues

# Special Uses Permitted in A-1 Zoning

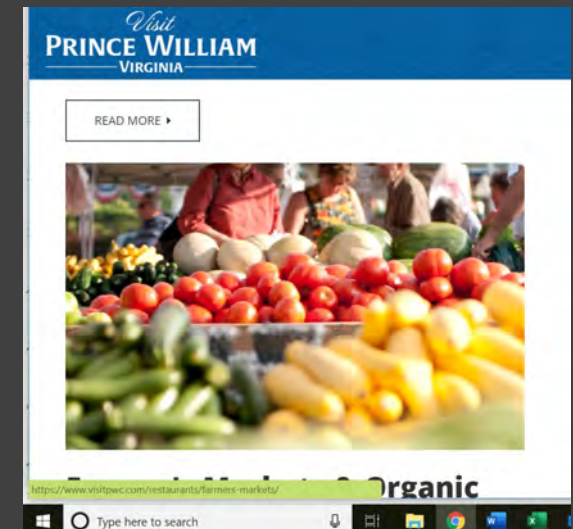
1. Adaptive reuse of a historic building.
2. Adult day care facility.
3. Airport, heliport, private airstrip.
4. Bed and breakfast
5. Cemetery.
6. Childcare facility.
7. Civic club.
8. Commercial kennels.
9. Commercial recreation facility, outdoor, excluding laser tag facilities.
10. Commercial riding facility, equestrian center, polo club.
11. Community operated parks, clubhouses, swimming pools, racquet / tennis courts, health and fitness facilities
12. Extraction of mineral resources (mining, quarrying, etc.).
13. Farmer's market/flea market.
14. Garden center.
15. Horse racetrack
16. Home business
17. Landscaping service.
18. Lodging house
19. Mortuary, funeral home, crematory accessory to a cemetery
20. Paintball facilities.
21. Petting farm.
22. Private camp.
23. Private school.
24. Recovery home.
25. Religious institution
26. Retail sales/breeding of exotic birds and miniature animals (other than dogs)
27. Rifle, pistol, skeet, trap, archery range, turkey shoots; indoor shooting ranges.
28. Rural home business.
29. Satellite parking lot for religious institution
30. Shelters for the homeless.
31. Solar energy facility.
32. Storage or disposal of nonagricultural excavation material,
33. Nonagricultural excavation material shall include only soil and rock. Nothing herein shall be deemed to allow dump heaps or the storage or disposal of waste or construction debris.
34. Travel trailer and camp park.
35. Veterinary hospital.

**In 2014 a change to zoning ordinance also permits restaurants and kitchens associated with a brewery, winery, distillery is permitted (albeit min. 10 acres)**

# Rural Strategy



- BOCS must determine the Community's appetite to establish a strategy to target rural business
- A market study could provide the BOCS with info it needs for this decision
- PWC is one of the most affluent counties in the country; the buying power is immense
- Can the county change its image



# Food and Drinking Places



Pro Renata Farm Brewery,  
Crozet VA  
4,000 sq. ft.



Blue Mountain Brewery,  
Afton, VA  
7,700 sq. ft.



Blue Toad Distillery  
Avon, VA  
4,000 sq. ft.



Pollack Vineyard  
Greenwood, VA  
7,500 sq. ft.



Old Bust Head Brewery  
Vint Hill, VA  
12,000 sq. ft.



Villaggio  
Clifton, VA  
5,000 sq. ft.



La Grange Winery  
Antioch, VA  
4,000 sq. ft.



Hammerdown BBQ  
Loudoun, VA  
4,000 sq. ft.

# Rural Strategy

- Can the County be helpful in creating direct sourcing from farmers
- Can the County support a healthy restaurant and food industry that gives new emphasis on farm-to-table
- Can the County identify underutilized structures in the rural area that can accommodate some of these uses.
- Can the county change its image?



# TAPESTRY SEGMENTATION

The Fabric of America's Neighborhoods



## UNITED STATES OF AMERICA

Total Population: 327,514,300 Median Income: \$56,100 Home Ownership Rate: 62.7%  
 Total Households: 123,158,900 Median Net Worth: \$93,300 Average Household Size: 2.59  
 Median Age: 38.2 Diversity Index: 64.0 Median Home Value: \$207,300



FOR MORE INFORMATION ABOUT TAPESTRY SEGMENTATION  
 • Call 1.800.441.0776  
 • Visit [esri.com/tapestry](http://esri.com/tapestry)  
 • Send an email to [info@esri.com](mailto:info@esri.com)



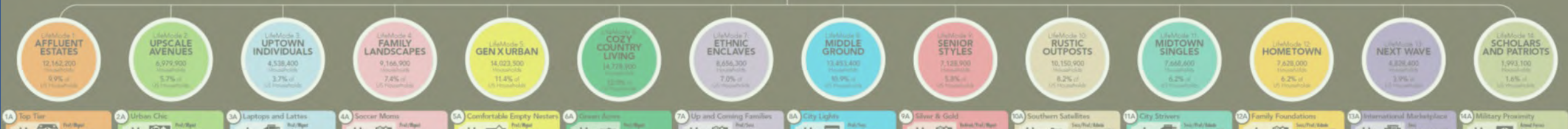
# TAPESTRY SEGMENTATION

The Fabric of America's Neighborhoods



## UNITED STATES OF AMERICA

Total Population: 327,514,300  
 Total Households: 123,158,900  
 Median Age: 38.2  
 Median Income: \$56,100  
 Median Net Worth: \$93,300  
 Diversity Index: 64.0  
 Home Ownership Rate: 62.7%  
 Average Household Size: 2.59  
 Median Home Value: \$207,300



## Top Twenty Tapestry Segments

Rank	Tapestry Segment	2018 Households Cumulative		2018 U.S. Households Cumulative		Index
		Percent	Percent	Percent	Percent	
1	Boomburbs (1C)	63.6%	63.6%	1.7%	1.7%	3772
2	The Great Outdoors (6C)	29.7%	93.3%	1.6%	3.3%	1,908
3	Savvy Suburbanites (1D)	6.7%	100.0%	3.0%	6.3%	227

### FOR MORE INFORMATION ABOUT TAPESTRY SEGMENTATION

+ Call 1.800.447.9778  
 + Visit us online at esri.com  
 + Send us an email to info@esri.com

#### LIFEMODE SUMMARY GROUPS

- Affluent Estates:** Established wealth—educated, well-educated married couples in higher density neighborhoods.
- Upscale Avenues:** Progressive, married couples in higher density neighborhoods.
- Uptown Individuals:** Young, urban singles on the move.
- Family Landscapes:** Successful younger families in newer housing.
- Gen X Urban:** X in middle age, families with home lots and a mortgage.
- Cozy Country Living:** Empty nesters in rural settings.
- Ethnic Enclaves:** Established diversity—young, Hispanic households with families.
- Middle Ground:** Lifestyles of heterogeneity.
- Senior Styles:** Senior lifestyles reveal the effects of aging for retirement.
- Rustic Outposts:** Country life with older families, older homes.
- Midtown Singles:** Millennials on the move, single, diverse, and urban.
- HomeTown:** Growing up and staying close to home, single professionals.
- Next Wave:** Urban diversity, young, diverse, homebuilding families.
- Scholars and Patriots:** College campuses and military neighborhoods.

#### URBANIZATION SUMMARY GROUPS

- Principal Urban Centers:** Young, mobile, diverse in homes of 2.3+ million people.
- Urban Periphery:** City life for starting families with single family homes.
- Metro Cities:** Affordable city life, including smaller metros, satellite cities.
- Suburban Periphery:** Affluence in the suburbs, married couple families, larger commutes.
- HomeTown:** Small town living, families with affordable homes.
- Rural:** Country living with older families, low density, and low diversity.

#### SEGMENT LEGEND

**Segment Name**

**Household Profile:** Family and community

- Family: Married couple
- Family: Married couple with children
- Family: Single parent
- Nonfamily: Single
- Nonfamily: Shared

**DEFINITIONS IN THE SEGMENT DESCRIPTIONS**

Household 2000 type: Family and community

- Family: Married couple
- Family: Married couple with children
- Family: Single parent
- Nonfamily: Single
- Nonfamily: Shared

**Segment Metrics:** Rules in the LifeMode Summary Group

**Segment Name:** Early unique name for the segment

**Households:** Represents the typical number of people and type of household

**Household Income:** Median household income and single parents, single households, and shared households are included

**Diversity:** Represents a typical diversity for the segment

**Median Age:** Median age of the segment, compared to the US median

**Median Income:** Median household income of the segment, compared to the US median income

**Households:** Total households of the segment

**Household Income:** Median household income of the segment, compared to the US median income

**Diversity:** Total diversity of the segment

**Household Income:** Median household income of the segment, compared to the US median income





LifeMode Group: Affluent Estates  
**Boomburbs**

1C

Households: 2,004,400  
Average Household Size: 3.25  
Median Age: 34.0  
Median Household Income: \$113,400

**WHO ARE WE?**

This is the new growth market, with a profile similar to the original: young professionals with families that have opted to trade up to the newest housing in the suburbs. The original Boomburbs neighborhoods began growing in the 1990s and continued through the peak of the housing boom. Most of those neighborhoods are fully developed now. This is an affluent market but with a higher proportion of mortgages. Rapid growth still distinguishes the Boomburbs neighborhoods, although the boom is more subdued now than it was 10 years ago. So is the housing market. Residents are well-educated professionals with a running start on prosperity.

**OUR NEIGHBORHOOD**

- Growth markets are in the suburban periphery of large metropolitan areas.
- Young families are married with children (Index 220); average household size is 3.25.
- Home ownership is 84% (Index 134), with the highest rate of mortgages, 71.5% (Index 173).
- Primarily single-family homes, in new neighborhoods, 66% built since 2000 (Index 441).
- Median home value is \$350,000 (Index 167).
- Lower housing vacancy rate at 3.7%.
- The cost of affordable new housing comes at the expense of one of the longest commutes to work, over 30 minutes average, including a disproportionate number (53.6%) commuting across county lines (Index 141).

**SOCIOECONOMIC TRAITS**

- Well educated young professionals, 55% are college graduates (Index 178).
- Unemployment is low at 3.3% (Index 61); high labor force participation at 71.3% (Index 114); most households have more than two workers (Index 124).
- Longer commute times from the suburban growth corridors have created more home workers (Index 156).
- They are well connected; own the latest devices and understand how to use them efficiently; biggest complaints—too many devices and too many intrusions on personal time.
- Financial planning is well under way for these professionals.

Note: The index represents the ratio of the market rate to the US rate multiplied by 100. Consumer preference are estimated from data by ESRI.

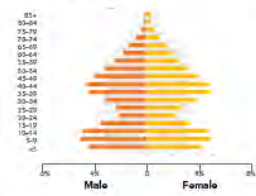


1C

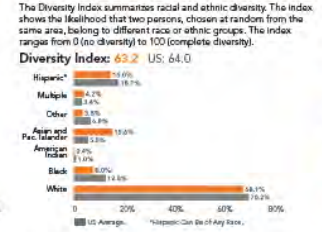
LifeMode Group: Affluent Estates  
**Boomburbs**



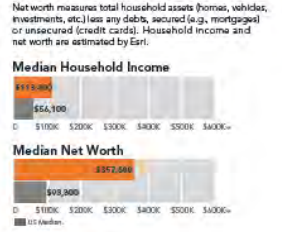
**AGE BY SEX**



**RACE AND ETHNICITY**

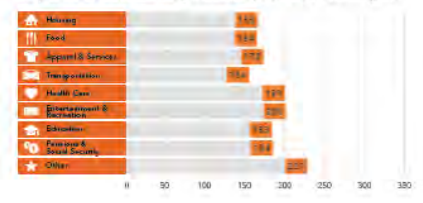


**INCOME AND NET WORTH**



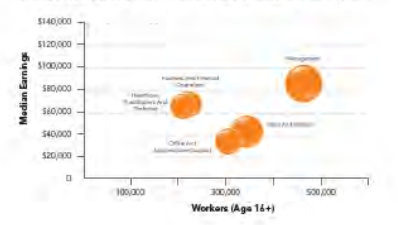
**AVERAGE HOUSEHOLD BUDGET INDEX**

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



**OCCUPATION BY EARNINGS**

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



1C LifeMode Group: Affluent Estates  
**Boomburbs**



**MARKET PROFILE**

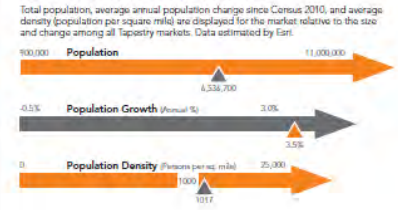
- Boomburbs residents prefer late model imports, primarily SUVs, and also luxury cars and minivans.
- This is one of the top markets for the latest in technology, from smartphones to tablets to Internet connectable televisions.
- Style matters in the Boomburbs, from personal appearance to their homes. These consumers are still furnishing their new homes and already remodeling.
- They like to garden but more often contract for home services.
- Physical fitness is a priority, including club memberships and home equipment.
- Leisure includes a range of activities from sports (hiking, bicycling, swimming, golf) to visits to theme parks or water parks.
- Residents are generous supporters of charitable organizations.

**HOUSING**

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**POPULATION CHARACTERISTICS**



**ESRI INDEXES**

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



1C LifeMode Group: Affluent Estates  
**Boomburbs**



**SEGMENT DENSITY**

This map illustrates the density and distribution of the Boomburbs Tapestry Segment by households.



For more information  
1-800-441-9776  
info@esri.com  
esri.com

THE SCIENCE OF WHERE™

©Copyright 2014 Esri. All rights reserved. For more information, contact Esri at 3801 Market Street, Redlands, California 92341, or call 1-800-441-9776. Esri, the Esri logo, ArcGIS, and the Esri logo are trademarks of Esri. All other marks contained herein may be trademarks of their respective owners.



LifeMode Group: Cozy Country Living  
**The Great Outdoors**

6C

**Households:** 1,908,600  
**Average Household Size:** 2.44  
**Median Age:** 47.4  
**Median Household Income:** \$56,400

**WHO ARE WE?**

These neighborhoods are found in pastoral settings throughout the United States. Consumers are educated empty nesters living an active but modest lifestyle. Their focus is land. They are more likely to invest in real estate or a vacation home than stocks. They are active gardeners and partial to homegrown and home-cooked meals. Although retirement beckons, most of these residents still work, with incomes slightly above the US level.

**OUR NEIGHBORHOOD**

- Over 55% of households are married-couple families; 36% are couples with no children living at home.
- Average household size is slightly smaller at 2.44.
- Typical of areas with rustic appeal, the housing inventory features single-family homes (77%) and mobile homes (15%); a significant inventory of seasonal housing is available (Index 397).
- Residents live in small towns and rural communities throughout the West, South, and Northeast regions of the country.
- More than half of all homes were constructed between 1970 and 2000.
- Most households have one or two vehicles; average travel time to work is slightly higher (28 minutes) despite a disproportionate number that work from home (Index 149).

**SOCIOECONOMIC TRAITS**

- 60% have attended college or hold a degree.
- Unemployment is lower at 4.8% (Index 88), but so is labor force participation at 60%.
- Typical of neighborhoods with older residents, income from retirement and Social Security is common, but residents also derive income from self-employment and investments.
- Residents are very do-it-yourself oriented and cost conscious.
- Many service their own autos, work on home improvement and remodeling projects, and maintain their own yards.
- They prefer domestic travel to trips abroad.

Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



LifeMode Group: Cozy Country Living  
**The Great Outdoors**



**MARKET PROFILE**

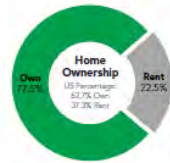
- Satellite dishes and riding lawn mowers are familiar sights in these rural settings, along with multiple vehicles; four-wheel drive trucks are popular, too.
- Residents are members of AARP and veterans' clubs and support various civic causes.
- Technology is not central in their lives: light use of Internet connectivity for shopping to entertainment.
- Most households have pets—dogs or cats.
- Television channels such as CMT, History, and Fox News are popular.
- They enjoy outdoor activities such as hiking, hunting, fishing, and boating.

**HOUSING**

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
 Single Family  
**Median Value:**  
 \$239,500  
 US Median: \$209,300



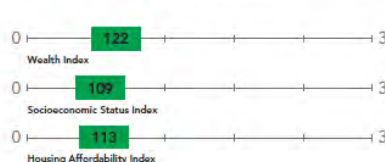
**POPULATION CHARACTERISTICS**

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



**ESRI INDEXES**

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



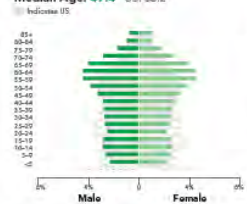
6C

LifeMode Group: Cozy Country Living  
**The Great Outdoors**



**AGE BY SEX**

Median Age: 47.4 US: 38.2



**RACE AND ETHNICITY**

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 35.6 US: 64.0



**INCOME AND NET WORTH**

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

**Median Household Income**

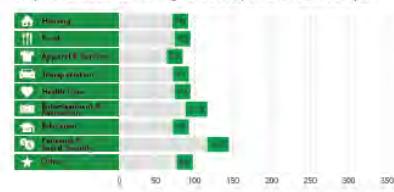


**Median Net Worth**



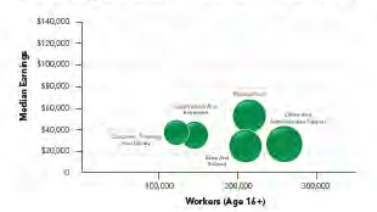
**AVERAGE HOUSEHOLD BUDGET INDEX**

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



**OCCUPATION BY EARNINGS**

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



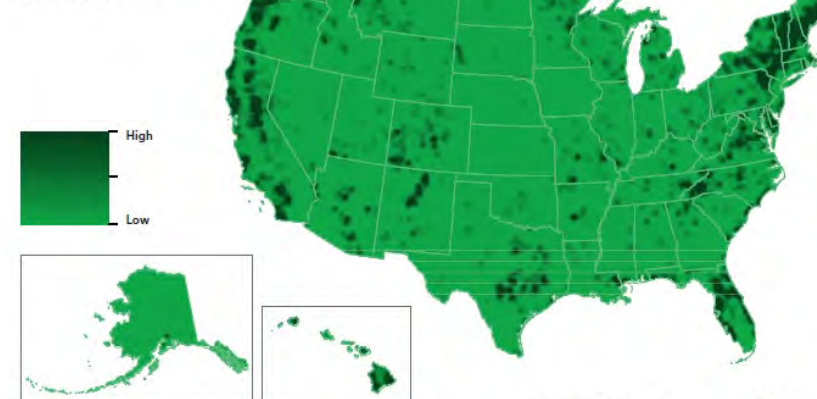
6C

LifeMode Group: Cozy Country Living  
**The Great Outdoors**



**SEGMENT DENSITY**

This map illustrates the density and distribution of the The Great Outdoors Tapestry Segment by households.



Copyright © 2012 Esri. All rights reserved. For more information, contact Esri. Esri, the Esri logo, ArcView, ArcGIS, and ArcGIS Online are either registered trademarks or trademarks of Esri in the United States and/or other countries. Other brands and product names are trademarks of their respective owners.

For more information  
 1.800.447.9778  
 info@esri.com  
 esri.com



LifeMode Group: Affluent Estates  
**Savvy Suburbanites**

1D

Households: 3,664,200  
 Average Household Size: 2.85  
 Median Age: 45.1  
 Median Household Income: \$108,700

**WHO ARE WE?**

Savvy Suburbanites residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the city's cultural events.

**OUR NEIGHBORHOOD**

- Established neighborhoods (most built between 1970 and 1990) found in the suburban periphery of large metropolitan markets.
- Married couples with no children or older children; average household size is 2.85.
- 91% owner occupied; 66% mortgaged (Index 160).
- Primarily single-family homes, with a median value of \$362,900 (Index 161).
- Low vacancy rate at 3.8%.

**SOCIOECONOMIC TRAITS**

- Education: 50.6% college graduates; 77.6% with some college education.
- Low unemployment at 3.5% (Index 65); higher labor force participation rate at 67.9% (Index 109) with proportionately more 2-worker households at 62.2% (Index 120).
- Well-connected consumers that appreciate technology and make liberal use of it for everything from shopping and banking to staying current and communicating.
- Informed shoppers that do their research prior to purchasing and focus on quality.

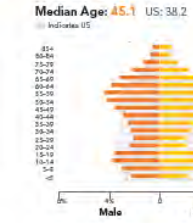


Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by CTR, Inc. Consumer performance are estimated from data by CTR, Inc.

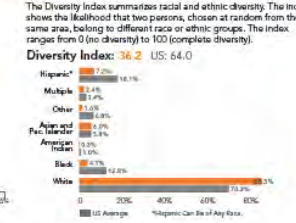
LifeMode Group: Affluent Estates  
**Savvy Suburbanites**



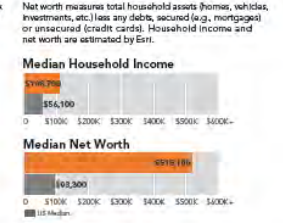
**AGE BY SEX** (Est. data)



**RACE AND ETHNICITY** (Est. data)



**INCOME AND NET WORTH**



**AVERAGE HOUSEHOLD BUDGET INDEX**



**OCCUPATION BY EARNINGS**



LifeMode Group: Affluent Estates  
**Savvy Suburbanites**

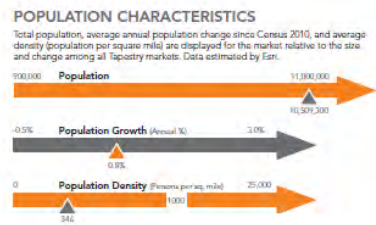


- MARKET PROFILE** (Consumer preferences are estimated from data by CTR, Inc.)
- Residents prefer late model, family-oriented vehicles: SUVs, minivans, and station wagons.
  - Gardening and home remodeling are priorities, usually DIY. Riding mowers and power tools are popular, although they also hire contractors for the heavy lifting.
  - There is extensive use of housekeeping and personal care services.
  - Foodies: They like to cook and prefer natural or organic products.
  - These investors are financially active, using a number of resources for informed investing. They are not afraid of debt; many households carry first and second mortgages, plus home equity credit lines.
  - Physically fit, residents actively pursue a number of sports, from skiing to golf, and invest heavily in sports gear and exercise equipment.

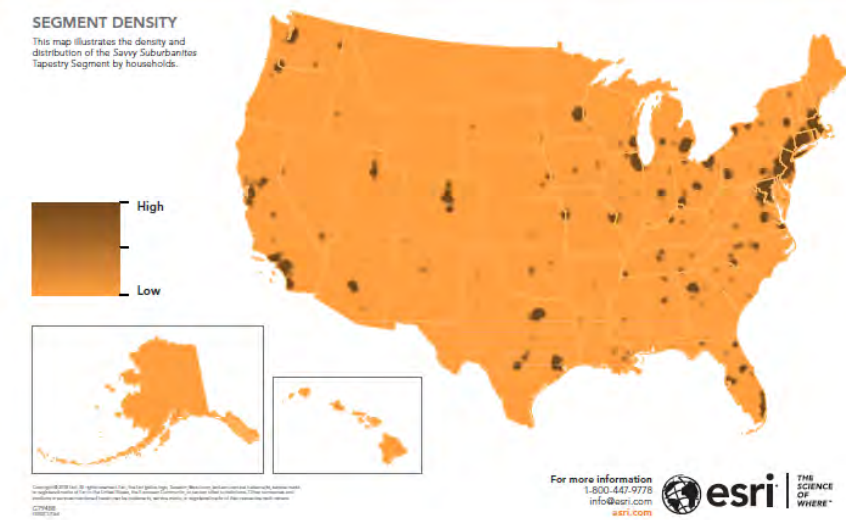
**HOUSING**

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by ERI. Housing type and average rent are from the Census Bureau's American Community Survey.

Typical Housing: Single Family  
 Median Value: \$362,900  
 US Median: \$177,300



LifeMode Group: Affluent Estates  
**Savvy Suburbanites**



# Market Support is only one of many considerations

- Site Characteristics and Limitations
- Planning and Vision
  - Municipality's Plans and Vision = Comprehensive Plan, Zoning, Strategic Plans
  - Neighborhood Consultation and External Factors

# Can you Change the Trajectory of the Market

- Design
- Place Making
- Programing
- Access
- Amenities





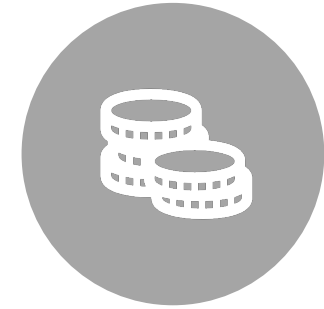
## *Development Area*

- **100,000 Acres (156 Square Miles) of Existing Development:**
- **14,000 Acres (22 Square Miles) of Undeveloped Residential Land**
- **12,000 (19 Square Miles) of Undeveloped Commercial & Industrial Land**

14,000 acres of  
**undeveloped residential**  
land in the development  
area.



14,000 ACRES @ 15 DU  
PER ACRE = 210,000



14,000 ACRES @ 10 DU  
PER ACRE = 140,000

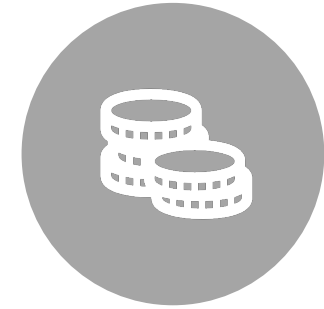


14,000 ACRES @ 5.8  
DU PER ACRE = 81,200

7,000 acres of  
**undeveloped residential**  
land in the development  
area.



7,000 ACRES @ 15 DU  
PER ACRE = 105,000



7,000 ACRES @ 10 DU  
PER ACRE = 70,000



7,000 ACRES @ 5.8 DU  
PER ACRE = 40,600



# Dumb Density Decisions

Rays Regarde 5.8 du per acre  
(shameful)

---

- Near I-95
- Near Commuter Lot
- Near Rt. 1
- Near VRE
- Near Services and Amenities





WOODVALE CT

FOR EST GLEN RD

R DEAN KILBY  
ELEMENTARY SCHOOL

HORNER RD

SUMMERLAND DR





# The Real Opportunity in the Development Area

Redevelopment and infill for underperforming  
properties







LifeMode Group: Middle Ground  
**Bright Young Professionals**

8C

**Households:** 2,750,200  
**Average Household Size:** 2.41  
**Median Age:** 33.0  
**Median Household Income:** \$54,000

**WHO ARE WE?**

Bright Young Professionals is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. More than one out of three householders is under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes; over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value, and average rent are close to the US values. Residents of this segment are physically active and up on the latest technology.

**OUR NEIGHBORHOOD**

- Approximately 57% of the households rent; 43% own their homes.
- Household type is primarily couples, married (or unmarried), with above average concentrations of both single-parent (Index 125) and single-person (Index 115) households.
- Multitunit buildings or row housing make up 56% of the housing stock (row housing (Index 178), buildings with 5–19 units (Index 275)); 43% built 1980–99.
- Average rent mirrors the US (Index 100).
- Lower vacancy rate is at 8.2%.

**SOCIOECONOMIC TRAITS**

- Education completed: 35% with some college or an associate's degree, 33% with a bachelor's degree or higher.
- Unemployment rate is lower at 4.7%, and labor force participation rate of 72% is higher than the US rate.
- These consumers are up on the latest technology.
- They get most of their information from the Internet.
- Concern about the environment, impacts their purchasing decisions.



Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by CUE INC.



LifeMode Group: Next Wave  
**International Marketplace**

13A

**Households:** 1,528,100  
**Average Household Size:** 3.07  
**Median Age:** 32.8  
**Median Household Income:** \$46,500

**WHO ARE WE?**

International Marketplace neighborhoods are a rich blend of cultures, found in densely populated urban and suburban areas, almost entirely in the Middle Atlantic (especially in New York and New Jersey) or in California. Almost 40% of residents are foreign-born; nearly 1 in 4 households are linguistically isolated. Young, Hispanic families renting apartments in older buildings dominate this market; about one quarter of households have children. Over one-fifth of households have no vehicle, typically those living in the city. Workers are mainly employed in white collar and service occupations (especially food service and building maintenance). One-fifth of workers commute using public transportation and more walk or bike to work than expected. Median household income is lower, but home values are higher, reflecting the metropolitan areas in which they live. Consumers are attentive to personal style; purchases reflect their youth and their children. True to their culture, residents visit Spanish language websites, watch programs on Spanish TV networks, and listen to Hispanic music.

**OUR NEIGHBORHOOD**

- Densely settled urban periphery of large metropolitan areas, East and West Coasts.
- Young, diverse family market: 41% families with children (married couple or single parent), plus married couples without children and a notable proportion of multigenerational households (Index 174).
- Approximately 76% of householders in multitunit apartment buildings, 30% in 2–4 unit structures (Index 372).
- Majority of apartments built before 1970 (65%), 29% built before 1940 (Index 223).
- 1 or 2 vehicles for two-thirds of households; 22% have no vehicle (Index 243).

**SOCIOECONOMIC TRAITS**

- Almost 40% of the population were born abroad; almost 1 in 5 households have residents who do not speak English.
- 27% have no high school diploma (Index 210); 28% have a high school diploma only (Index 103).
- Labor force participation rate is 67% and higher than the US average; unemployment is also slightly higher, at 6%.
- These are hard-working consumers, striving to get ahead; style matters to them.
- Preserving the environment and being in tune with nature are very important.
- Media used most often is the Internet.



Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by CUE INC.

**Top Four Segments in Woodridge**



LifeMode Group: Next Wave  
**Las Casas**

13B

**Households:** 912,400  
**Average Household Size:** 4.12  
**Median Age:** 28.3  
**Median Household Income:** \$38,300

**WHO ARE WE?**

Cultural differences depict Las Casas, a family-oriented market distinguished by multigenerational households. Their spending reflects their children—baby food and furniture or children's apparel—and convenience—fast food and family restaurants. Consumer choices also focus on personal style, as well as the latest trends and fashions. Although young and predominantly renters, this market is stable, affected more by immigration from abroad than local moves.

**OUR NEIGHBORHOOD**

- Older neighborhoods, which can be found in the urban periphery of large metropolitan areas, primarily on the West Coast.
- Most of the housing built before 1960; 25% built before 1940.
- Housing a mix of single-family homes (less than half) and apartments, primarily in buildings with 2–4 units.
- Primarily renter-occupied homes, with an average rent of \$1,067 monthly.
- Family market, primarily married couples with children, but also a number of multigenerational households; average household size at 4.12.

**SOCIOECONOMIC TRAITS**

- More than 40% of the population was born abroad (Index 327); 25% of the households have members who speak only Spanish (Index 558).
- Unemployment is high at 7.0%; labor force participation is average (Index 98).
- They're trendy consumers who focus on style.
- Brand loyalty and environmentally safe products also guide purchasing choices, although these consumers are open to new products.
- They use but do not rely on technology.



Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by CUE INC.



LifeMode Group: Ethnic Enclaves  
**American Dreamers**

7C

**Households:** 1,824,900  
**Average Household Size:** 3.19  
**Median Age:** 32.5  
**Median Household Income:** \$50,900

**WHO ARE WE?**

Located throughout the South and West, most American Dreamers residents own their own homes, primarily single-family housing—farther out of the city, where housing is more affordable. Median household income is slightly below average (Index 91). The majority of households include younger married-couple families with children and, frequently, grandparents. Diversity is high; many residents are foreign born, of Hispanic origin. Hard work and sacrifice have improved their economic circumstance as they pursue a better life for themselves and their family. Spending is focused more on the members of the household than the home. Entertainment includes multiple televisions, movie rentals, and video games at home or visits to theme parks and zoos. This market is connected and adept at accessing what they want from the Internet.

**OUR NEIGHBORHOOD**

- American Dreamers residents are family-centric and diverse. Most are married couples with children of all ages or single parents; multigenerational homes are common (Index 201).
- Average household size is higher at 3.19 (Index 123).
- Residents tend to live further out from urban centers—more affordable single-family homes and more elbow room.
- Tenure is slightly above average with 64% owner occupancy; primarily single-family homes with more mortgages (Index 114) and slightly higher monthly costs (Index 115).
- Three quarters of all housing were built since 1970.
- Many neighborhoods are located in the urban periphery of the largest metropolitan areas across the South and West.
- Most households have one or two vehicles available and a longer commute to work.

**SOCIOECONOMIC TRAITS**

- While nearly 17% have earned a college degree, the majority, or 63%, hold a high school diploma only or spent some time at a college or university.
- Unemployment is higher at 7.4% (Index 136); labor force participation is also higher at 66%.
- Most American Dreamers residents derive income from wages or salaries, but the rate of poverty is a bit higher in this market (Index 116).
- They tend to spend money carefully and focus more on necessities.
- They are captivated by new technology, particularly feature-rich smartphones.
- Connected: They use the Internet primarily for socializing but also for convenience, like paying bills online.



Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by CUE INC.



Hemingway Dr

Hillendale Dr

Hendricks Dr

Lipscomb Pl

Tupeo Ct

Minion St

Rollingwood Dr

Litza Way

Westwind Dr

Burr Rd

Bentley Cir

Haker Pl

Castlebridge Ln

Haversack Ln

Smoketown Rd

Choir St

Jacks Dr

40 Acres

135 Acres

294

Bethel

Elm Farm Rd

Bonny Rd

Gardensen Dr

Great Oaks Dr

Granby Rd

Greenwood Dr

Gran Deur Dr

Glendale Rd

Tarpon Ln

Andorra Dr

Croaker Ln

Bluefin Dr

Hereford Rd

Fairfield Ln

© 2018 Google

Malta St

Madrigal Dr

Office Rd

Golansky Blvd

Noble Pond Way

Google Earth

Old Rte 3000

55



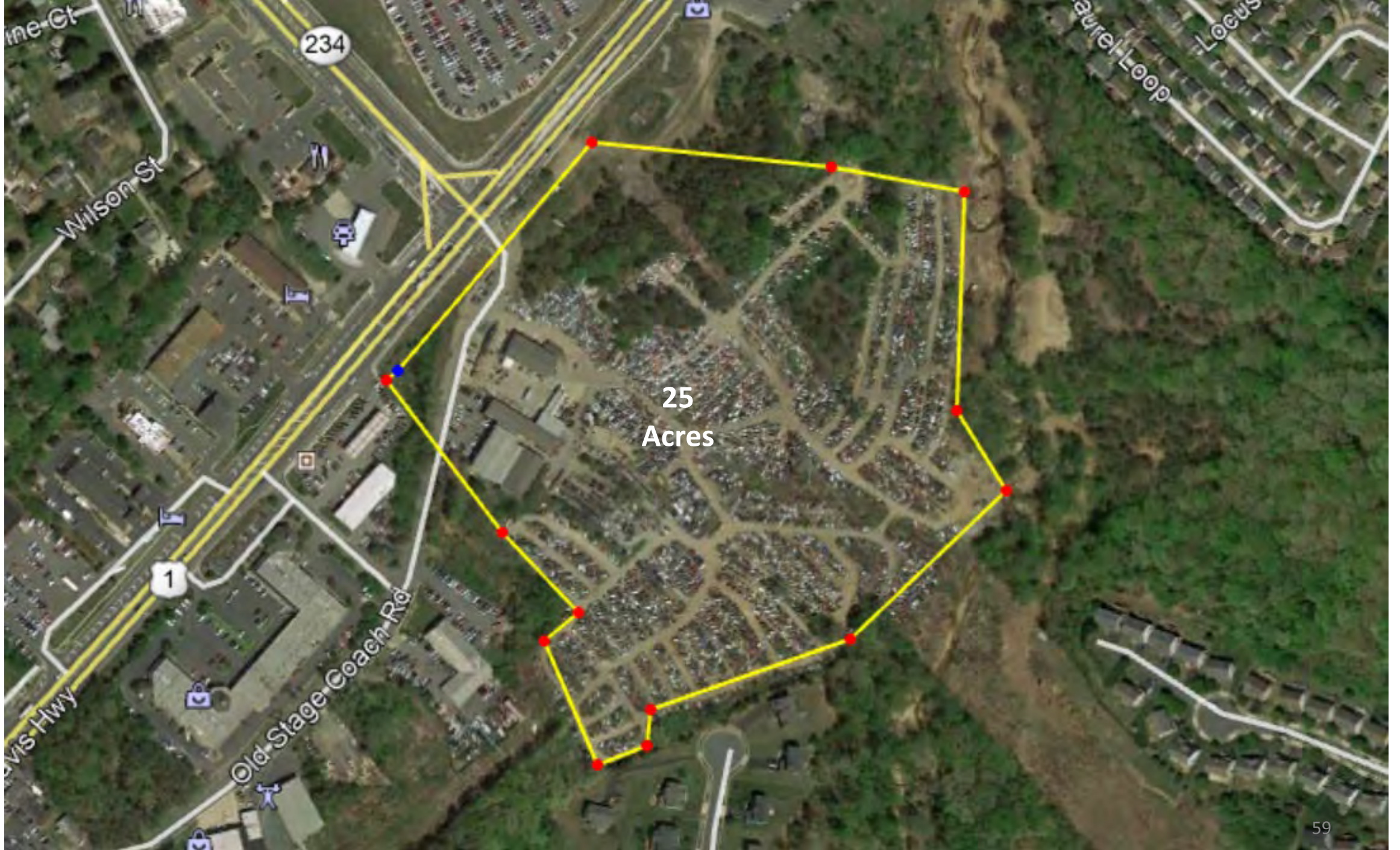
80  
Acres







**35  
Acres**

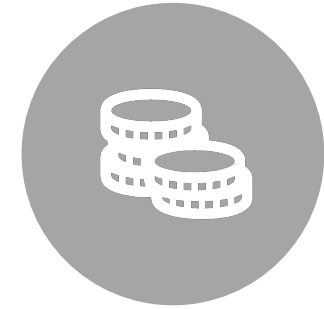




Just these several locations equals approximately 200 acres of **re-developable** land in the development area.



200 ACRES @ 15 DU  
PER ACRE = 3,000



200 ACRES @ 10 DU  
PER ACRE = 2,000



200 ACRES @ 5.8  
DU PER ACRE = 1,160

Recognize that infill and redevelopment is difficult; much more difficult than greenfield development.

1

Requires commitment from County elected officials & staff, and citizens

2

Must include real incentives:

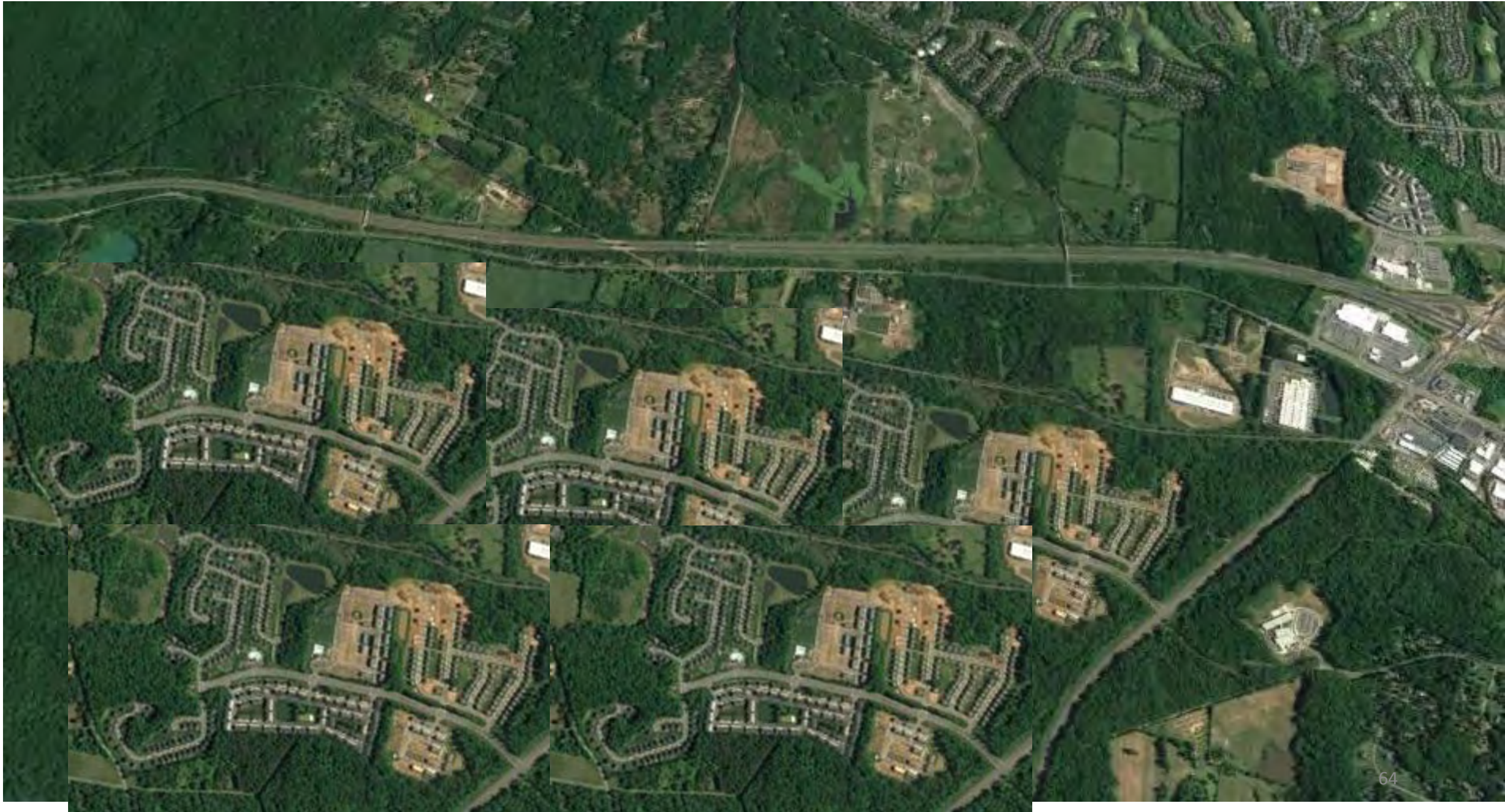
- Priority processing
- Density bonuses
- Strike team for community engagement
- Reduction in on & off-site improvements & dedicated capital fund to fill the gap

3

Start small - Get some successful examples under your belt

- Economic development and housing goals of the county are achieved
- Re-creating the places that today's citizens/workers want to live
- Remake the image of the county: design and typology perspective















# Rural Property Owners



Fair market value



Growing need for artisanal and unique agricultural uses  
Agrihoods, Ag Related Retail, Ag Tourism



No obligation under current law, no obligation under county policy and no requirement from a fairness perspective to guarantee large property owners a retirement nest-egg from their property.



450,000 citizens of this county don't own large land holdings and should not be expected to have their tax dollars used to ensure infrastructure and services in rural areas.



Real Estate and land use is all about location, location, location.