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.
Three Pillars in Land Development

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
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

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
  - Usable 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)

<table>
<thead>
<tr>
<th>Total Acreage</th>
<th>Acreage w/ Existing Units</th>
<th>Total</th>
<th>By Unit Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>500</td>
<td>500</td>
<td>150 100</td>
</tr>
<tr>
<td>250</td>
<td>450 450 5 0</td>
<td>450</td>
<td>5 0</td>
</tr>
<tr>
<td>250</td>
<td>133 133 5 5</td>
<td>133</td>
<td>5 5</td>
</tr>
<tr>
<td>250</td>
<td>0 0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1948</td>
<td>1338 510 100</td>
<td>1338</td>
<td>510 100</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Population</th>
<th>Household</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010 Total Population</td>
<td>2015 Median Household Income</td>
</tr>
<tr>
<td>7,445</td>
<td>$38,240</td>
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<tr>
<td>2015 Total Population</td>
<td>2020 Median Household Income</td>
</tr>
<tr>
<td>8,068</td>
<td>$46,420</td>
</tr>
<tr>
<td>2020 Total Population</td>
<td>2015-2020 Annual Rate</td>
</tr>
<tr>
<td>8,811</td>
<td>3.95%</td>
</tr>
<tr>
<td>2015-2020 Annual Rate</td>
<td></td>
</tr>
<tr>
<td>1.78%</td>
<td></td>
</tr>
</tbody>
</table>

- **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.

<table>
<thead>
<tr>
<th>Ring</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>½ Mile</td>
<td><img src="Link" alt="Table 1" /></td>
</tr>
<tr>
<td>1 Mile</td>
<td><img src="Link" alt="Table 2" /></td>
</tr>
<tr>
<td>2 Mile</td>
<td><img src="Link" alt="Table 3" /></td>
</tr>
</tbody>
</table>
Industry groups with notable surpluses 1 mile concentric ring

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

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
<th>Median</th>
<th>Lower Decile</th>
<th>Upper Decile</th>
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<tbody>
<tr>
<td></td>
<td>2006</td>
<td>2008</td>
<td></td>
<td></td>
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<tr>
<td>Total tenant sales</td>
<td>$278.52</td>
<td>$295.78</td>
<td>$273.22</td>
<td>$288.25</td>
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<tr>
<td>Total operating receipts</td>
<td>13.70</td>
<td>15.44</td>
<td>13.34</td>
<td>14.79</td>
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<tr>
<td>Total operating expenses</td>
<td>4.33</td>
<td>4.56</td>
<td>3.88</td>
<td>4.40</td>
</tr>
<tr>
<td>Net operating balance</td>
<td>9.13</td>
<td>10.77</td>
<td>9.12</td>
<td>10.43</td>
</tr>
</tbody>
</table>

Total 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:

- Clothing Stores: 38,170 x 25% = 9,543 of Clothing, Shoe, leather Goods, Luggage Shops
- General Merchandise: 190,689 x 25% = 47,672 of General Merchandise (Department Stores)
- Food Service and Drink: 14,508 x 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
### 10 Minute Drive Time

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

### 2017 Industry Group

<table>
<thead>
<tr>
<th>Industry Group</th>
<th>NAICS</th>
<th>2017 (Retail Potential)</th>
<th>2017 (Retail Sales)</th>
<th>Retail Gap</th>
<th>Leakage/Surplus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor Vehicle &amp; Parts Dealers</td>
<td>4411</td>
<td>$72,434,872</td>
<td>$22,931,581</td>
<td>$49,503,291</td>
<td>51.9%</td>
</tr>
<tr>
<td>Automobile Dealers</td>
<td>4411</td>
<td>$59,172,393</td>
<td>$17,522,228</td>
<td>$41,650,165</td>
<td>54.3%</td>
</tr>
<tr>
<td>Other Vehicle Dealers</td>
<td>4411</td>
<td>$7,520,766</td>
<td>$1,096,537</td>
<td>$6,424,229</td>
<td>74.5%</td>
</tr>
<tr>
<td>Auto Parts, Accessories &amp; Tire Stores</td>
<td>4412</td>
<td>$6,741,571</td>
<td>$4,312,414</td>
<td>$2,429,157</td>
<td>12.4%</td>
</tr>
<tr>
<td>Furniture &amp; Home Furnishings Stores</td>
<td>442</td>
<td>$13,552,783</td>
<td>$9,087,896</td>
<td>$4,464,887</td>
<td>17.9%</td>
</tr>
<tr>
<td>Furniture Stores</td>
<td>442</td>
<td>$7,510,565</td>
<td>$1,965,924</td>
<td>$5,544,641</td>
<td>55.9%</td>
</tr>
<tr>
<td>Home Furnishings Stores</td>
<td>442</td>
<td>$6,092,383</td>
<td>$2,959,388</td>
<td>$3,133,995</td>
<td>-11.1%</td>
</tr>
<tr>
<td>Electronic &amp; Appliance Stores</td>
<td>443</td>
<td>$11,931,166</td>
<td>$2,526,844</td>
<td>$9,404,322</td>
<td>80.5%</td>
</tr>
<tr>
<td>Appliance Stores</td>
<td>443</td>
<td>$22,554,374</td>
<td>$6,395,891</td>
<td>$16,158,483</td>
<td>72.0%</td>
</tr>
<tr>
<td>Audio, Video &amp; Photographic Equipment Stores</td>
<td>443</td>
<td>$8,769,288</td>
<td>$0</td>
<td>$8,769,288</td>
<td>100.0%</td>
</tr>
<tr>
<td>Beer, Wine &amp; Liquor Stores</td>
<td>443</td>
<td>$19,471,898</td>
<td>$10,344,352</td>
<td>$9,127,546</td>
<td>30.6%</td>
</tr>
<tr>
<td>Liquor Stores</td>
<td>443</td>
<td>$5,741,677</td>
<td>$4,312,415</td>
<td>$1,429,262</td>
<td>14.2%</td>
</tr>
<tr>
<td>Food &amp; Beverage Stores</td>
<td>445</td>
<td>$59,078,892</td>
<td>$58,459,688</td>
<td>$619,204</td>
<td>0.5%</td>
</tr>
<tr>
<td>Grocery Stores</td>
<td>445</td>
<td>$54,590,525</td>
<td>$55,799,448</td>
<td>$1,208,923</td>
<td>1.1%</td>
</tr>
<tr>
<td>Convenience Stores</td>
<td>445</td>
<td>$1,719,087</td>
<td>$1,679,740</td>
<td>$39,347</td>
<td>1.2%</td>
</tr>
<tr>
<td>Convenience Stores</td>
<td>445</td>
<td>$2,769,280</td>
<td>$0</td>
<td>$2,769,280</td>
<td>100.0%</td>
</tr>
<tr>
<td>General Merchandise Stores</td>
<td>452</td>
<td>$62,119,820</td>
<td>$38,999,570</td>
<td>$23,120,250</td>
<td>22.9%</td>
</tr>
<tr>
<td>Department Stores Excluding Leased Depts.</td>
<td>452</td>
<td>$43,607,702</td>
<td>$38,269,856</td>
<td>$5,337,846</td>
<td>6.5%</td>
</tr>
<tr>
<td>Other General Merchandise Stores</td>
<td>452</td>
<td>$18,512,118</td>
<td>$729,254</td>
<td>$17,782,864</td>
<td>92.4%</td>
</tr>
<tr>
<td>Food &amp; Beverage Stores</td>
<td>453</td>
<td>$12,006,170</td>
<td>$732,254</td>
<td>$11,282,916</td>
<td>90.3%</td>
</tr>
<tr>
<td>Jewelry, Luggage &amp; Leather Goods Stores</td>
<td>453</td>
<td>$3,390,666</td>
<td>$0</td>
<td>$3,390,666</td>
<td>100.0%</td>
</tr>
<tr>
<td>Sporting Goods, Hobby, Book &amp; Music Stores</td>
<td>453</td>
<td>$2,972,912</td>
<td>$3,590,874</td>
<td>$617,962</td>
<td>8.5%</td>
</tr>
<tr>
<td>Sporting Goods, Book &amp; Music Stores</td>
<td>453</td>
<td>$2,924,254</td>
<td>$3,590,874</td>
<td>$666,620</td>
<td>22.6%</td>
</tr>
<tr>
<td>Toys &amp; Hobby Stores</td>
<td>453</td>
<td>$1,453,512</td>
<td>$624,840</td>
<td>$828,672</td>
<td>29.9%</td>
</tr>
<tr>
<td>General Merchandise Stores</td>
<td>453</td>
<td>$62,119,820</td>
<td>$38,999,570</td>
<td>$23,120,250</td>
<td>22.9%</td>
</tr>
<tr>
<td>Department Stores Excluding Leased Depts.</td>
<td>453</td>
<td>$43,607,702</td>
<td>$38,269,856</td>
<td>$5,337,846</td>
<td>6.5%</td>
</tr>
<tr>
<td>Office Supplies, Stationery &amp; Gift Stores</td>
<td>453</td>
<td>$3,188,349</td>
<td>$302,612</td>
<td>$2,885,737</td>
<td>82.7%</td>
</tr>
<tr>
<td>Used Merchandise Stores</td>
<td>453</td>
<td>$1,595,026</td>
<td>$202,596</td>
<td>$1,392,430</td>
<td>79.8%</td>
</tr>
<tr>
<td>Other Miscellaneous Store Retailers</td>
<td>453</td>
<td>$6,941,481</td>
<td>$6,317,520</td>
<td>$623,961</td>
<td>17.7%</td>
</tr>
<tr>
<td>Vending Machine Operators</td>
<td>453</td>
<td>$596,315</td>
<td>$0</td>
<td>$596,315</td>
<td>100.0%</td>
</tr>
<tr>
<td>Printers</td>
<td>453</td>
<td>$1,888,349</td>
<td>$302,612</td>
<td>$1,585,737</td>
<td>82.7%</td>
</tr>
<tr>
<td>Used Merchandise Stores</td>
<td>453</td>
<td>$3,188,349</td>
<td>$302,612</td>
<td>$2,885,737</td>
<td>82.7%</td>
</tr>
<tr>
<td>Secondhand Stores</td>
<td>453</td>
<td>$2,152,118</td>
<td>$624,840</td>
<td>$1,527,278</td>
<td>74.1%</td>
</tr>
<tr>
<td>Used Merchandise Stores</td>
<td>453</td>
<td>$1,595,026</td>
<td>$202,596</td>
<td>$1,392,430</td>
<td>79.8%</td>
</tr>
<tr>
<td>Vending Machine Operators</td>
<td>453</td>
<td>$929,515</td>
<td>$0</td>
<td>$929,515</td>
<td>100.0%</td>
</tr>
<tr>
<td>Jewelry, Luggage &amp; Leather Goods Stores</td>
<td>453</td>
<td>$621,857</td>
<td>$0</td>
<td>$621,857</td>
<td>100.0%</td>
</tr>
<tr>
<td>Drug Stores</td>
<td>453</td>
<td>$1,719,087</td>
<td>$1,679,740</td>
<td>$39,347</td>
<td>1.2%</td>
</tr>
<tr>
<td>Restaurant Equipment &amp; Supplies Stores</td>
<td>455</td>
<td>$929,515</td>
<td>$0</td>
<td>$929,515</td>
<td>100.0%</td>
</tr>
<tr>
<td>Food Services &amp; Drinking Places</td>
<td>722</td>
<td>$38,154,019</td>
<td>$20,000,548</td>
<td>$18,153,471</td>
<td>47.2%</td>
</tr>
<tr>
<td>Restaurants/Other Eating Places</td>
<td>722</td>
<td>$37,129,826</td>
<td>$19,580,546</td>
<td>$17,549,280</td>
<td>47.2%</td>
</tr>
</tbody>
</table>
### 20 Minute Drive Time

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

<table>
<thead>
<tr>
<th>NAICS</th>
<th>Demand (Retail Potential)</th>
<th>Supply (Retail Sales)</th>
<th>Retail Gap</th>
<th>Leakage/Surplus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Dealers</td>
<td>$637,076,012</td>
<td>$634,734,996</td>
<td>$2,341,016</td>
<td>0.3</td>
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<tr>
<td>Other Motor Vehicle Dealers</td>
<td>$67,092,264</td>
<td>$56,702,611</td>
<td>$10,389,653</td>
<td>8.4</td>
</tr>
<tr>
<td>Auto Parts, Accessories &amp; Tire Stores</td>
<td>$121,371,976</td>
<td>$135,548,491</td>
<td>-$14,176,515</td>
<td>-11.0</td>
</tr>
<tr>
<td>Furniture &amp; Home Furnishings Stores</td>
<td>$67,974,827</td>
<td>$63,662,891</td>
<td>$4,311,936</td>
<td>5.2</td>
</tr>
<tr>
<td>Furniture Stores</td>
<td>$67,974,827</td>
<td>$63,662,891</td>
<td>$4,311,936</td>
<td>5.2</td>
</tr>
<tr>
<td>Home Furnishings Stores</td>
<td>$67,974,827</td>
<td>$63,662,891</td>
<td>$4,311,936</td>
<td>5.2</td>
</tr>
<tr>
<td>Electro &amp; Appliance Stores</td>
<td>$103,751,100</td>
<td>$153,272,916</td>
<td>-$49,521,816</td>
<td>-19.3</td>
</tr>
<tr>
<td>Bltg Materials, Garden Equip. &amp; Supply Stores</td>
<td>$269,874,643</td>
<td>$259,734,823</td>
<td>$10,139,820</td>
<td>3.9</td>
</tr>
<tr>
<td>Lawn &amp; Garden Equip &amp; Supply Stores</td>
<td>$301,873,941</td>
<td>$190,412,206</td>
<td>$111,461,735</td>
<td>22.6</td>
</tr>
<tr>
<td>Food &amp; Beverage Stores</td>
<td>$545,571,839</td>
<td>$658,314,534</td>
<td>-$112,742,695</td>
<td>-9.4</td>
</tr>
<tr>
<td>Groceries</td>
<td>$504,319,363</td>
<td>$611,431,251</td>
<td>-$107,111,888</td>
<td>-9.6</td>
</tr>
<tr>
<td>Specialty Stores</td>
<td>$566,997,963</td>
<td>$573,005,761</td>
<td>-$6,007,798</td>
<td>-0.5</td>
</tr>
<tr>
<td>Department Stores Excluding Leased Depts.</td>
<td>$179,489,797</td>
<td>$157,802,606</td>
<td>$21,687,191</td>
<td>6.4</td>
</tr>
<tr>
<td>Other General Merchandise Stores</td>
<td>$170,260,364</td>
<td>$210,537,517</td>
<td>-$40,277,153</td>
<td>-10.6</td>
</tr>
<tr>
<td>Miscellaneous Store Retailers</td>
<td>$112,392,971</td>
<td>$91,860,580</td>
<td>$20,532,391</td>
<td>10.1</td>
</tr>
<tr>
<td>Florists</td>
<td>$5,578,336</td>
<td>$1,131,581</td>
<td>$4,446,755</td>
<td>66.3</td>
</tr>
<tr>
<td>Office Supplies, Stationery &amp; Gift Stores</td>
<td>$25,042,530</td>
<td>$25,823,185</td>
<td>-$780,655</td>
<td>-3.1</td>
</tr>
<tr>
<td>Used Merchandise Stores</td>
<td>$18,370,355</td>
<td>$9,670,724</td>
<td>$8,699,631</td>
<td>47.2</td>
</tr>
<tr>
<td>Other Miscellaneous Store Retailers</td>
<td>$58,904,555</td>
<td>$64,235,723</td>
<td>-$5,331,168</td>
<td>-8.9</td>
</tr>
<tr>
<td>Electronics Shopping &amp; Mail-Order Houses</td>
<td>$35,525,582</td>
<td>$20,900,666</td>
<td>$14,624,916</td>
<td>42.1</td>
</tr>
<tr>
<td>Vending Machine Operators</td>
<td>$2,716,041</td>
<td>$113,200</td>
<td>$2,602,841</td>
<td>184.5</td>
</tr>
<tr>
<td>Direct Selling Establishments</td>
<td>$10,782,970</td>
<td>$4,995,842</td>
<td>$5,787,128</td>
<td>54.2</td>
</tr>
<tr>
<td>Food Services &amp; Drinking Places</td>
<td>$346,726,510</td>
<td>$306,944,444</td>
<td>$39,782,066</td>
<td>6.6</td>
</tr>
<tr>
<td>Specialized Services</td>
<td>$4,834,171</td>
<td>$743,512</td>
<td>$4,090,659</td>
<td>55.3</td>
</tr>
<tr>
<td>Drinking Places - Alcohol Beverages</td>
<td>$4,381,459</td>
<td>$904,901</td>
<td>$3,476,558</td>
<td>80.2</td>
</tr>
<tr>
<td>Restaurants/Other Eating Places</td>
<td>$337,410,888</td>
<td>$305,293,623</td>
<td>$32,117,265</td>
<td>9.6</td>
</tr>
</tbody>
</table>
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

Country Market

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

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.
15. Horse racetrack
16. Home business
17. Landscaping service.
18. Lodging house
19. Mortuary, funeral home, crematory accessory to a cemetery
20. Paintball facilities.
22. Private camp.
23. Private school.
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.

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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?
<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affluent Estates</td>
<td>High-end real estate, luxury living, upper-class neighborhoods</td>
</tr>
<tr>
<td>Upscale Individuals</td>
<td>Well-educated professionals, high-income earners</td>
</tr>
<tr>
<td>Uptown Individuals</td>
<td>Urban, affluent, lifestyle-focused, high-end amenities</td>
</tr>
<tr>
<td>Family Landscape</td>
<td>Suburban areas, family-friendly, safe living spaces</td>
</tr>
<tr>
<td>Gen X Urban</td>
<td>Young professionals, urban living, eclectic lifestyle</td>
</tr>
<tr>
<td>Country Living</td>
<td>Rural, farm life, close to nature, quiet living</td>
</tr>
<tr>
<td>Ethnic Enclaves</td>
<td>Predominantly ethnic communities, cultural diversity</td>
</tr>
<tr>
<td>Senior Styles</td>
<td>Retirement communities, accessible living, senior-friendly amenities</td>
</tr>
<tr>
<td>Rustic Outdoors</td>
<td>Country living, natural beauty, outdoor activities</td>
</tr>
<tr>
<td>Midtown Singles</td>
<td>Young, urban, vibrant, lifestyle-focused</td>
</tr>
<tr>
<td>Next Wave</td>
<td>Emerging trends, future-focused, innovative living</td>
</tr>
<tr>
<td>Hometown</td>
<td>Traditional, family-oriented, community-focused</td>
</tr>
<tr>
<td>Scholars and Pioneers</td>
<td>Educated, innovative, forward-thinking, future-focused</td>
</tr>
</tbody>
</table>

**United States of America**
- Total Population: 333,000,000
- Median Income: $65,000
- Median Age: 38.2
- Diversity Index: 60.3
- Homeownership Rate: 62.7
- Average Household Size: 2.5
- Median Home Value: $193,500

**Data Source:** American Community Survey 2019-2021, Esri.
## Top Twenty Tapestry Segments

<table>
<thead>
<tr>
<th>Rank</th>
<th>Tapestry Segment</th>
<th>2018 Households</th>
<th>2018 U.S. Households</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Cumulative Percent</td>
<td>Cumulative Percent</td>
</tr>
<tr>
<td>1</td>
<td>Boomburbs (1C)</td>
<td>63.6%</td>
<td>1.7%</td>
</tr>
<tr>
<td>2</td>
<td>The Great Outdoors (6C)</td>
<td>29.7%</td>
<td>1.6%</td>
</tr>
<tr>
<td>3</td>
<td>Savvy Suburbanites (1D)</td>
<td>29.7%</td>
<td>1.6%</td>
</tr>
</tbody>
</table>
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
The Real Opportunity in the Development Area

Redevelopment and infill for underperforming properties
35 Acres
Top Four Segments in Woodridge
135 Acres

40 Acres
12 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.