

2011

Jefferson Davis Highway Revitalization Study

Prepared by the Richmond Regional Planning
District Commission

On Behalf of Chesterfield County



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District Commission**

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I. Executive Summary

Every fiscal year the Richmond Regional Planning District Commission (RRPDC) completes a technical assistance project on a rotating basis for one the four larger jurisdictions. In fiscal year 2011, Chesterfield County requested RRPDC staff to conduct an economic study of the most distressed portion of Chesterfield's Jefferson Davis Highway (U.S. Route 1) Corridor with the goal of identifying where the economic opportunities exist. The delineated Jefferson Davis Study Area represents a commercial corridor which lacks many services and retail options for residents.

RRPDC staff worked with Chesterfield's Revitalization Staff to lay the groundwork for this revitalization study by first collecting data on the current conditions along the corridor, performing a market analysis to identify where the unmet demand exists for commercial uses, and highlighting opportunity sites on which these uses could be located.

Major findings of the Study include:

- Dominated by light industrial uses, automotive oriented services, and motels basic goods and services for residents are lacking.
- Due to natural and manmade barriers, the study area has limited accessibility to the adjacent areas of the County.
- Compounding the geographic isolation, a relatively small number of residents to support retail anchors, forces residents and workers to go elsewhere for retail goods and services.
- The market study documents the potential to increase the residential density in the area to support a small to medium scale grocery store.
- The market analysis indicates a significant amount of unmet demand for other complementary retail goods and services which may create connections to other services along the corridor.

The objective in performing this Revitalization Study is to help guide economic growth through productive infill and redevelopment of Chesterfield's most distressed portion of the Route 1 corridor through a public-private partnership. Twelve opportunity sites are identified that offer the most potential for infill development, providing the County Economic Development office with parcel specific data on public utility and transportation accessibility, real estate assessment data, and current land use and zoning information to provide them tools in attracting development interests for the betterment of the residents and the County.



Map 1: Jefferson Davis Study Area



Legend

- Jurisdictional Boundaries
- Commercial Parcels
- Major Employers



U.S. Defense Supply Center

DuPont



0 0.25 0.5 1 Miles





II. Introduction

The Jefferson Davis Corridor is part of the historic U.S. Route 1 which stretches from Main to Florida. Before the introduction of the Federal Interstate Highway System this corridor was the one of the major thoroughfares in the Richmond region, connecting Petersburg to Richmond. Today much of the corridor is underutilized and consists mostly of light industrial uses, auto mechanic shops, and motels.

The study area of a six mile stretch extending from the Chesterfield County line to the north to Wamsley Boulevard south of Route 288. Many of the surrounding areas to the corridor have experienced a great deal of growth, especially farther south on Route 1 and to the west along Route 10, but Jefferson Davis Corridor has remained a distressed area for some time. The study area of the corridor is isolated from the rest of the county through natural and manmade barriers. These barriers include the James River to the east and the CSX railway and U.S. Defense Supply Center to the west. Because of these barriers, few arterial roads connect the corridor to the rest of the County, and as a result, many adjacent communities get their goods and services from other commercial centers nearby. Through a public-private partnership, the Jefferson Davis Corridor has the ability become an economically viable commercial corridor once again.

III. SWOT Analysis

The SWOT Analysis was assessed by RRPDC staff through a focus group session with members of the Jefferson Davis Association (JDA) as well as through data collection described in the existing conditions section of this document.

Strengths

Jefferson Davis Study area through Chesterfield County is part of the historic Route 1 corridor, which stretches from Main to Florida. Before the arrival of the Interstate Highway this was the main thoroughfare for people traveling along the eastern seaboard. Although this corridor has transitioned quite a bit since those days, many cultural and historical assets remain. The Jefferson Davis Study area claims the site as the first industrial site in the New World with the Falling Creek Ironworks, founded by the Virginia Company from 1619 to 1622. Additionally, geographically located near major waterways and transportation arteries positions this corridor in a central, easily accessed area.

One of the greatest strengths for the corridor is its central location to the Richmond region and close proximity to major highways and arterial roads, employment centers, and cultural and natural resources.

- Adjacent to Interstate I-95.
- Chippenham Parkway intersecting the northern portion of the corridor and Route 288 intersecting the southern portion of the corridor.
- Nearby employment centers of the U.S. Defense



View of Drewry's Bluff



- Supply Center and DuPont chemical plant.
- Close proximity to the James River, Bensley Park, Drewry's Bluff, Henricus Park, and Dutch Gap.

The Jefferson Davis corridor has a number of involved neighborhood and business associations including Amphyll, Bensley, Bellwood Manor, Rayon Park, and the Jefferson Davis Association (JDA). The JDA founded the BizWorks Enterprise Center in 2001, which acts as a small business incubator to help cultivate new and emerging businesses in Chesterfield and very much involved with the County in helping rejuvenate and revitalize the corridor. A thriving Latino population resides along the corridor and many of the restaurants and businesses are Latino owned and operated.

Weaknesses

The study area of the Jefferson Davis corridor spans six and half miles from Chesterfield/Richmond line in the north to just past Route 288 to the south. The focal point of the study lies between Chippenham Pkwy and Route 288; the most distressed portion of the corridor. Accessibility is a major concern for the corridor between Chippenham and Route 288. Between these two main arterial roads that intersect the corridor there is little east-west access across the area into the adjacent areas. The CSX railway and the U.S. Defense Supply Center act as a barrier for traffic to the west and the James River acts as a natural barrier to the east. This issue is compounded by the high toll of Pocahontas Pkwy east of the river. Although the corridor is easily accessible by I-95 and eastbound traffic from Chippenham and Route 288, there is little accessibility for traffic from collector roads in the adjacent areas of the County.

Currently, the cluster of businesses that occupy the corridor include auto services, fast food, motels, and convenience stores. There is a lack of basic shopping options including drugstores, grocery stores, general retail, medical offices, and recreational and entertainment options. The corridor also lacks a pedestrian friendly environment with disconnected sidewalks that suddenly end and start. Along this study area there is not one crosswalk, creating an unsafe walking environment for

pedestrians trying to navigate to the other side of the road. The significant number of vacant lots and buildings and incompatible uses creates even more of a disconnect along the corridor.

Because this corridor is essentially isolated from adjacent neighborhoods and communities, the current number of rooftops along the corridor is not enough to support the shopping options mentioned previously. Compared to the County as a whole, the vacancy rates along the corridor are substantially higher and median household income is significantly lower. Additionally, a large transient population living in the many mobile home parks that dot the corridor, may hinder a sense of community for the corridor. There seems to be a lack of coordination and promotion among the current businesses located here and a lack of understanding as to why businesses decide to leave. With no clear sense of a business retention program, many merchants have no real connection to the rest of the community and are solely focused on their bottom line which is a challenge given the immediate trade study area's relatively low buying power.



View of trailer park in Shady Hill



Opportunities

With the employment anchors of the U.S Defense Supply Center and DuPont located on the corridor there is a real opportunity for capturing a portion of this workforce to spend their money on goods and services along the corridor. The many vacant parcels scattered throughout the corridor can offer great potential for infill development. As one of the first major thoroughfares in the region, a great deal of public infrastructure is already in place. This means development costs for water and sewer hookups would be at a minimal cost. The corridor is adjacent to many natural resources such as the James River with many public access points nearby. A niche market could be exploited here to take advantage of the many amenities offered by the parks and recreational facilities along the James, including boat and RV dealerships, to anchor an outdoor sporting goods retailer.

Commuter traffic on I-95 is high yet many have of these commuters have little reason beside refueling to stop and shop along Jefferson Davis Hwy. Creating a niche or developing retail anchors along the corridor may help retailers capture some of this traffic. The opportunity for transforming the Port of Richmond to the north of the study area presents itself as an excellent opportunity to position the corridor's industrial uses. Several logistic hubs and warehouse facilities in the area would benefit greatly from the renewed interest in the Port.

Threats

Similar to many distressed areas, the perception of crime is a major obstacle for the corridor. Many avoid the corridor altogether for their shopping needs and instead opt for convenience goods in the adjacent commercial district. The amount of competition from these nearby commercial hubs poses a risk to the revitalization effort. The nearby commercial centers of Bermuda Square, Chester Village, Chester Towne Square, and Meadowdale Shopping Center have saturated the market to the point where there is little demand for a large anchor to be successful in the study area. In order to overcome this obstacle the Jefferson Davis Corridor will need to support many more residential rooftops and respond with some type of niche to compete with the adjacent areas. The state of the economy has not helped matters as state and local governments have continue to tighten their budgets, making it more difficult for the funding of future revitalization projects.



View of the James River

IV. Existing Conditions

Inventory of Building Conditions

The revitalization study of the Jefferson Davis Corridor began by evaluating the existing conditions of the study area. This was first done by conducting a physical inventory of the conditions of all the commercial buildings in order to get an accurate inventory of current building infrastructure available. Identifying the building conditions allowed RRPDC staff to locate which areas of the corridor that appeared to be more distressed and identify where economic opportunities would be most likely. More importantly it allowed a detailed inventory of the current businesses, illustrating the types of commercial uses are supporting the corridor.

Methodology

Along the six mile stretch of Jefferson Davis Corridor there were a total of 308 commercial buildings the RRPDC staff included in the inventory. The inventory was conducted in-house by RRPDC staff and as a result no licensed building inspector or architects were involved in the process. Buildings were grouped as either “dilapidated”, “poor”, “fair”, or “good”. The building structures assessment used a matrix form to accurately portray the condition of the structure. Within the four categories mentioned, each element of the building itself was rated, which included the roof, the wall, the windows, and any appenditures (porches, columns, awnings, railings, exterior stairways, etc). Each element of the structure was weighted as well, with the roof rated as a 4, the walls a 3, the windows a 2, and the appenditures a 1. After all four elements of the structure were evaluated into one of the four categories an overall assessment was completed. This was done by aggregating the different elements of the structure into an overall assessment. For example if a building was rated as having a poor roof, fair walls, poor windows, and poor appenditures then it had an overall assessment of “poor”. If both the roof and walls were rated a “poor” and the windows and appenditures were rated as “fair” then the building was given an overall assessment of “poor” since the roof and walls are weighted higher than the windows and appenditures. Examples of each building condition are as follows.

Dilapidated

- Roof caved-in, vegetation growing, sagging, rotted, severe leaking with a critical amount or rotting or missing roofing
- Structural damage such as open cracks in walls, vegetation growing on walls, bulging or a critical amount of loose or missing material
- Windows boarded up, panes broken
- Structural damage to appenditures such as cracked/fractured columns, sagging or loose porches and exterior stairways, rotted gutters or downspouts



Example of a dilapidated building along the corridor.

Poor

- Torn/broken shingles
- Chipped paint on walls, minor cracks, rotting
- Loose trim around windows, cracked window panes
- Missing material on appenditures, torn awnings, loose columns, weakened balusters or railings

Fair

- Slightly weathered roof, worn or faded shingles
- Neglected paint job on walls
- Neglected paint job on trim of windows
- Faded awning, missing insignificant materials on porch, exterior stairway, columns or railings



Good

- Roof has no defects
- Exterior walls lacks any structural defects, paint may have minor scuffs or marks
- Windows are in great condition, with the trim limited to very minor scuffs
- Appenditures are all in good condition with only very minor scuffs or marks



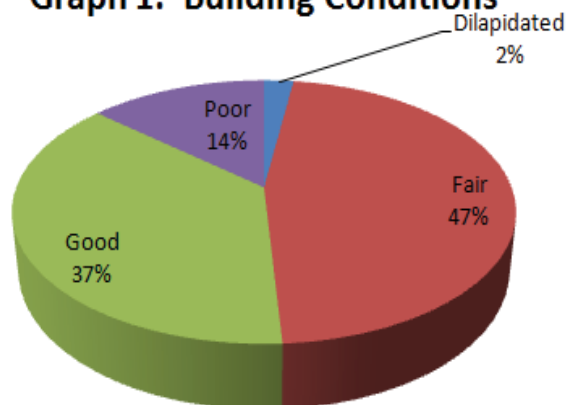
Example of a good building along the corridor (Halfway House).

Along with rating the building structures, the site conditions were also assessed. This included landscaping, lighting, and conditions of sidewalks and signage. In addition, the business name and type of business use was recorded.

Analysis of Building Conditions

Graph 1 displays the distribution of the building conditions along the corridor, which shows out of 308 commercial structures 84% are rated as either being in good or fair condition. This indicates the infrastructure of the commercial building are relatively strong along the corridor, and with a few exceptions, major renovations on the current stock should not be required. Map 2 indicates a cluster of buildings in good condition between Marina Drive and Alcott Road and Bellwood Rd and Reymet Road. Buildings deemed as dilapidated, poor and fair seem to scattered throughout the corridor

Graph 1: Building Conditions



Map 2: Commercial Building Conditions



Legend

- Road Network
- Major Employers
- Commercial Parcels

Building Conditions

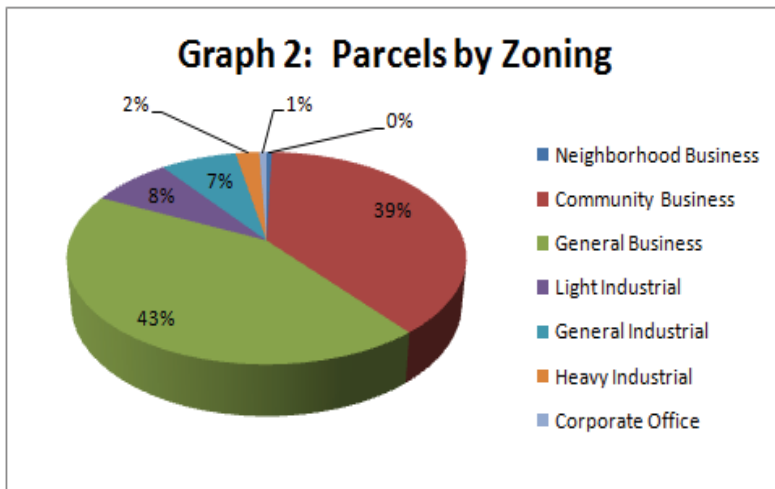
- Dilapidated
- Poor
- Good
- Fair



Source: Chesterfield County Building layer, 2005. Newer buildings were digitized by RRPDC staff. Prepared by RRPDC, 2011.

Analysis of Zoning and Land Use

The study area of the Jefferson Davis Corridor included 580 total commercial parcels in which there were seven different zoning classifications: Neighborhood Business (C-2), Community Business (C-3), General Business (C-5), Light Industrial (I-1), General Industrial (I-2), Heavy Industrial (I-3), and Corporate Office (O-2). A clearer illustration of the zoning classifications of the study area can be seen in Map 3. As shown in Graph 2, over 80% of the corridor is zoned for either Community Business or General Business. Both of these types of zoning classifications are very compatible to each other and allow for a wide range of commercial uses to occur. C-3 promotes community-scale commercial development to include shopping centers which serve community wide trade areas and promote public convenience and accessibility, and encourages mixed-use development of commercial, office, and residential multi-family. C-5 promotes commercial and industrial uses located along major arterials and is intended primarily for motor vehicle oriented uses.



As illustrated in Table 1, most of the structures were tenant-occupied. Out of the 308 commercial structures evaluated, 270 were occupied by tenants, 32 were vacant, and 6 could not be determined, giving a commercial vacancy rate of 11.8%. Compared to the Grubbs & Ellis 3rd Quarter 2010 Retail and Industrial Trends Report (during the same time period) the vacancy rates for the Richmond region was at 7.2% for retail and 12.9% for industrial.

Table 1: Occupancy Status		
	No. Of Building	%
Occupied	270	88%
Vaccant	32	10%
Cannot determine	6	2%
Total	308	100%

Inventory of Current Businesses

In the study area there are collectively 247 businesses ranging from retail, office, and industrial uses; with Table 2 showing the distribution of the top ten business categories located here. The most dominant category along the corridor consists of “Non-retail” or “Non-office”, businesses which do not require a market demand by nearby households, consisting mostly of light industrial uses such as manufacturer representatives and wholesale services, transportation logistic hubs, manufacturing centers, and motels.

Four of the top ten categories are centered around the automotive industry with used auto dealerships, parts and tires shops, auto mechanic shops, and gas stations making up over 26% of total businesses located in the study area. Sit down restaurants, fast food restaurants, and convenience stores make up over 14% of businesses. Personal services include banking and tax services and account for 4% of all businesses. Outside the top ten business categories are mostly retail services ranging from apparel stores, specialty stores, hardware stores, and furniture stores, among others.

Retail goods and services are lacking to serve the nearby community for basic necessities. Although there is one retail anchor of a grocery store, it is located in the northern portion of the corridor, but its intersection with Chippenham Parkway creates a disconnect from the rest of the corridor. Additionally, a drugstore and other common retail anchors for residents to buy their basic goods are not located in the area.

Map 3: Non-Residential Zoning

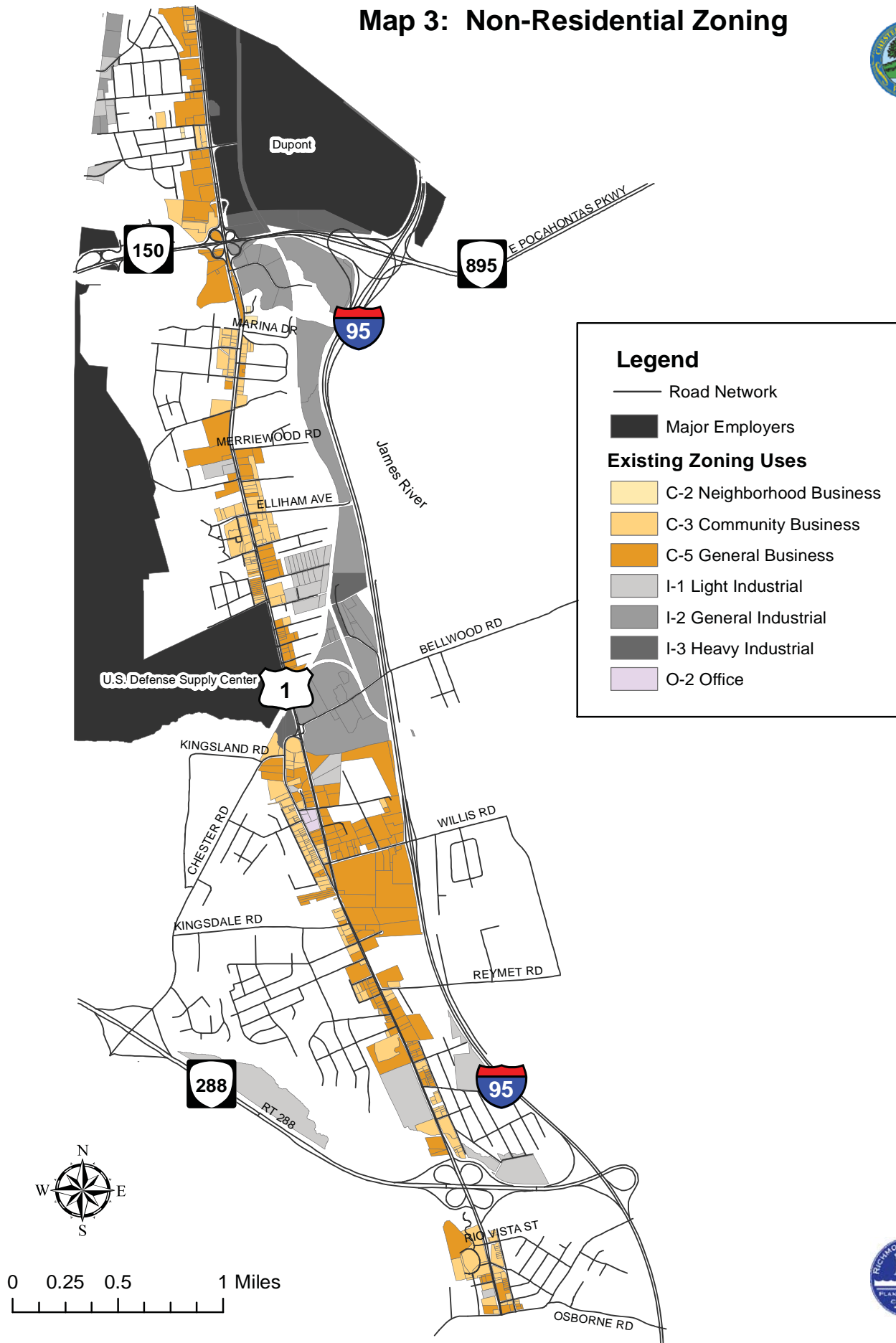




Table 2: Top 10 Business Categories

Rank	Type of Business	Number of Businesses	% of all businesses
1	Non-retail or Non-office use	92	37.2%
2	Transportation/Vehicles purchases/cars and trucks	24	9.7%
3	Transportation/Parts and Tires	19	7.7%
T4	Food Away From Home/Sit Down Restaurants	14	5.7%
T4	Transportation/Maintenance and repairs	14	5.7%
6	Food at home/Convenience	13	5.3%
7	Household Operations/Personal Services	10	4.0%
T8	Food Away From Home/Fast Food	9	3.6%
T8	Transportation/Gasoline and Motor Oil	9	3.6%
10	Transportation/Vehicles purchases/Other Vehicles	7	2.8%

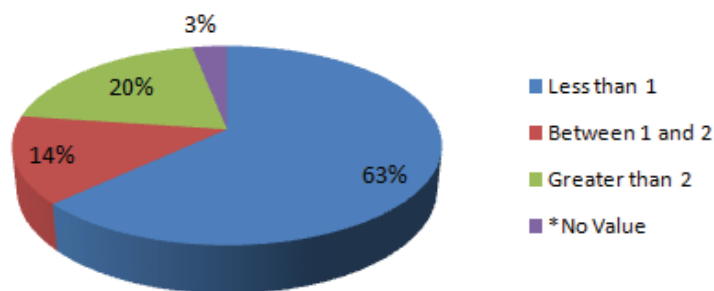
Real Estate Assessment

To gain a clearer picture of the development potential along the Jefferson Davis Corridor, an analysis of the real estate assessment values was performed by using the building to land value, also known as the improvement to land value, based on Chesterfield's real estate assessment data from 2nd quarter of 2011. Any parcel with a building to land value of less than one means the value of the building is less than the value of the land. From a revitalization perspective, these are the parcels that may generate more interest from developers because in many cases the structures are dilapidated or in poor condition which may result in lower acquisition and demolition cost. The building to land value of less than one also captures any vacant parcels in which there are no structures and therefore the improvement value is zero. Obviously any vacant parcels are more attractive to developers since no demolition would be required, and other site work such as clearing may be minimal, unless it is/was a brown-field site, i.e. a former gas station.

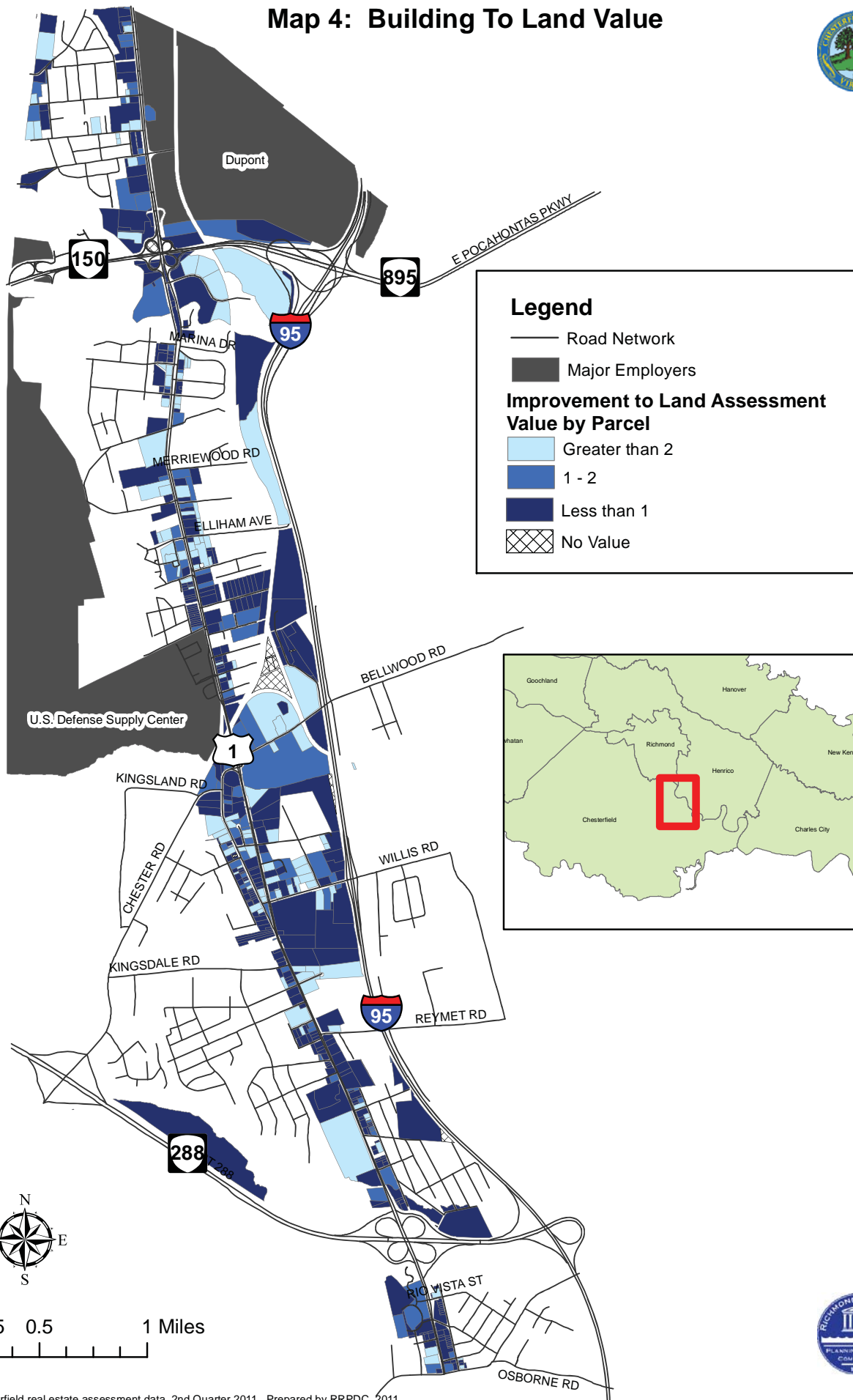
Graph 3 depicts the building to land value of the corridor. As shown, 63% of the study area has a value of less than one, which indicates there is a great amount of redevelopment potential along the corridor. Map 4 illustrates the improvement to land value ranges along the corridor, and as shown, the

most attractive parcels are not clustered in any particular area but instead scattered throughout.

Graph 3: Building to Land Values



Map 4: Building To Land Value



Data Source: Chesterfield real estate assessment data, 2nd Quarter 2011. Prepared by RRPDC, 2011

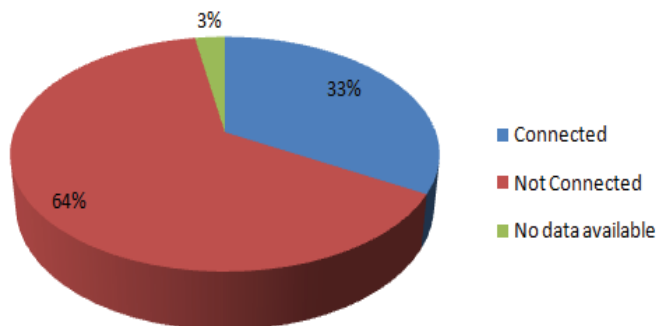


Utility Infrastructure

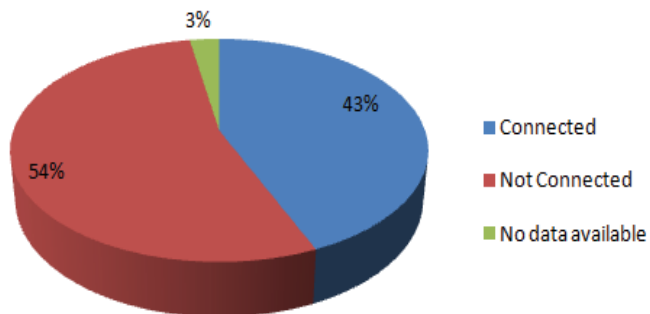
Access to public utilities can be a driving force behind whether developers decide to acquire property. A lack of utility infrastructure to a parcel can be detrimental to the revitalization process. The ease by which a site can be serviced by public water and sewer can significantly add to the site work costs, and in some cases may discourage developers from acquiring property to develop.

Graph 4 and 5 show the percentage of parcels serviced by public water and sewer, respectively. According to Chesterfield's parcel layer, less than half of all parcels are connected to water and only a third are connected to sewer. A more detailed assessment of water and sewer is depicted in Maps 5 and 6. Although many parcels may not have direct hookups to water and sewer many still have the ability to access these utilities through adjacent parcels. A more detailed look at the utility infrastructure will be discussed later in the opportunity sites portion of this document.

Graph 5: Percentage of Parcels Connected to Public Sewer



Graph 4: Percentage of Parcels Connected to Public Water



Map 5: Parcels Connected by Water



Legend

- Road Network
- Opportunity Sites

WATER

- No Data Available
- Connected
- Not Connected

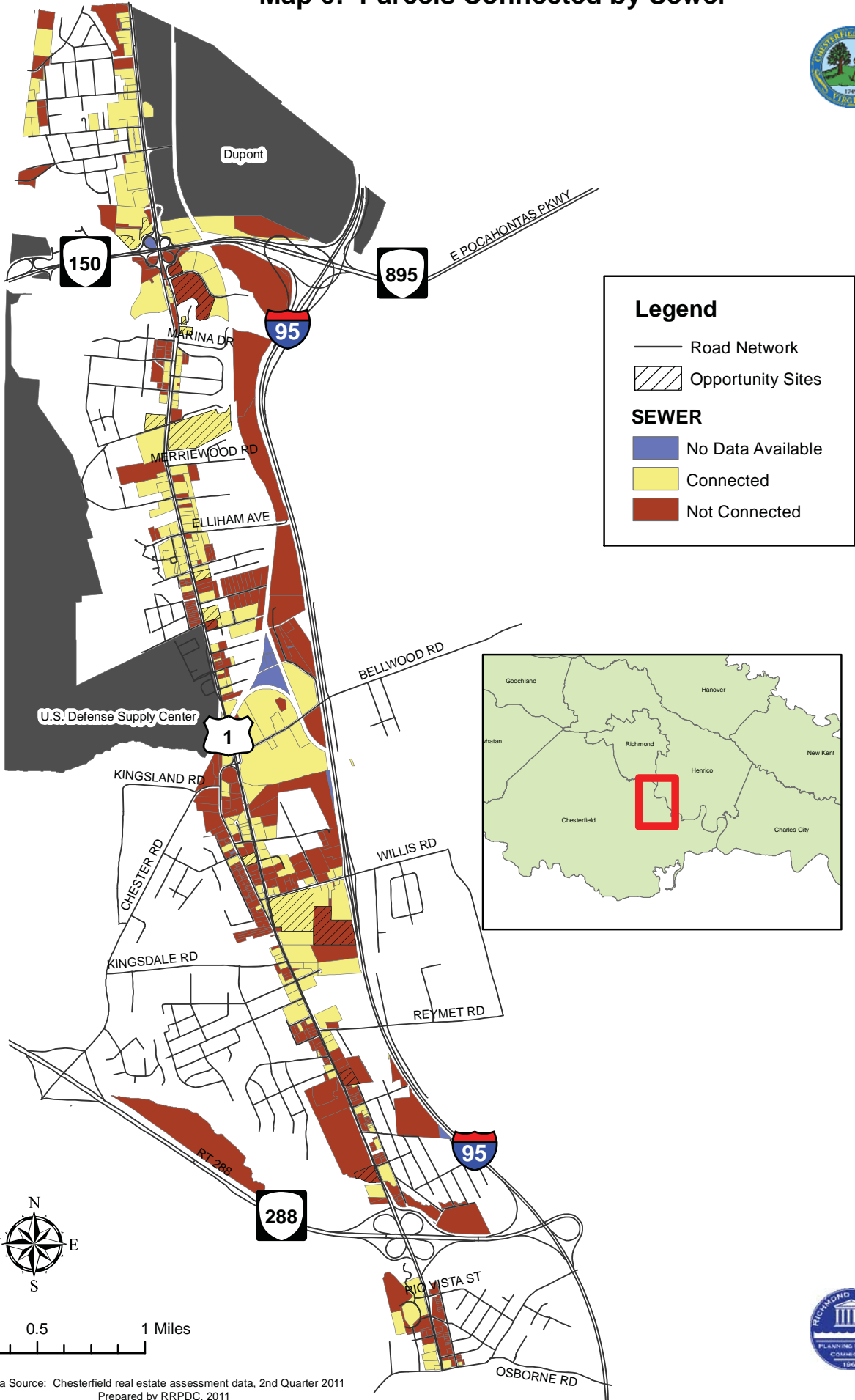


0 0.25 0.5 1 Miles

Data Source: Chesterfield real estate assessment data, 2nd Quarter 2011
Prepared by RRPDC, 2011



Map 6: Parcels Connected by Sewer



Data Source: Chesterfield real estate assessment data, 2nd Quarter 2011
Prepared by RRPDC, 2011



V. Market Analysis

The purpose of the market analysis is to identify the potential market demand for commercial uses along the Jefferson Davis Corridor. Due to the length of the corridor, two convenience trade areas were delineated. These trade areas draw potential complementary retail uses from the existing businesses to determine the density needed to support an anchor such as a grocery store or drugstore. A regional trade area to draw from adjacent areas is not considered practical because of the nearby competition of anchors and the physical constraints of the corridor, discussed below.

The trade area can be described as a geographical area from which businesses along Jefferson Davis can draw their customers. The trade area also derives the square footage or gross leasable area (GLA) of all businesses located here. Both trade areas described in the market analysis consists of households and businesses within one to two miles of the Jefferson Davis Corridor. The supply side of the market analysis involved using the Urban Land Institute's (ULI) Dollars and Cents of Shopping Centers to determine the GLA of a particular use and its associated median sales per square foot. Dollars and Cents takes into account many different types of markets to determine these estimates. The Jefferson Davis Corridor was most consistent with "super community/community shopping centers," which describes a retail area with neither a traditional department store nor the trade area of a regional shopping center.

Methodology

Using the "unmet demand" approach the following model was developed:

Demand Side

- Total dollar amount in each trade area for each type of good and service was calculated. This was done by using the 2009 Consumer Expenditure Survey by the Bureau of Labor Statistics, a national survey on consumers which calculates the percentage of income households are willing to spend on particular goods and services.
- These percentages were then applied to the number of households and household income (using 2005-2009 five year American Community Survey estimates) within each trade area

to estimate the total potential expenditures households are willing to spend on each good or service.

Supply Side

- The number of business establishments and the corresponding square footage of each establishment are aggregated and plugged into the model.
- The GLA and median sales per square foot derived from the ULI's 2008 Dollars and Cents of Shopping Centers, a national survey of retail tenants which determines the number of supportable retail square feet, was then plugged into the model.

The demand side and supply side are combined to determine if the number of current business establishments and household income can support different types of retail uses or if an unmet demand for new goods and services exists inside the trade area. A detailed look at the market analysis is presented in the Appendix.





Table 3: Unmet Demand Model

Total Expenditures in Trade Area	÷	Median Sales Per Square Foot	=	Number of Supportable Square Feet
Number of Supportable Square Feet	-	Existing Square Feet	=	Unmet Demand In Square Feet
Unmet Demand In Square Feet	÷	Median Gross Leasable Area (GLA)	=	Potential New Units

Trade Area 1

Trade area 1 represents the most distressed portion of the corridor between Route 288 and Chippenham Pkwy, as depicted in Map 2. Not only is it the most distressed stretch of the corridor it is also the most isolated portion of the corridor due to natural and manmade barriers. As shown in the map, this portion of the trade area is constrained by the James River to the east and the CSX railway and the U.S. Defense Supply Center to the west. This has created few opportunities for access into the heart of the corridor in addition to traffic along Route 1, resulting in a commercial corridor that is often overlooked by consumers, with more spending opportunities in other nearby retail centers.

The trade area was defined based on these physical constraints and nearby competition of other retail anchors. This trade area also includes households within one to two miles outside the corridor. The map illustrates how much competition exists from these nearby commercial centers, although the square footage of the competing business establishments are not inputted into the model because they are all located outside the trade area. In fact, all trade area business establishments are located within the within the study area, which means no other business establishments exists in trade area 1 outside the study area, shown in Map 7. All these factors dictated the trade area being defined as a convenience good market rather than a regional or shopper's good market.

Basic Assumptions

In applying the unmet demand model to trade area 1 some assumptions were applied to give a realistic outlook on the economic vitality of the corridor. Not only does this model capture household income, but it is intended to take into account dollars captured from commuters, the nearby workforce, and visitors. The following capture rates are assumed:

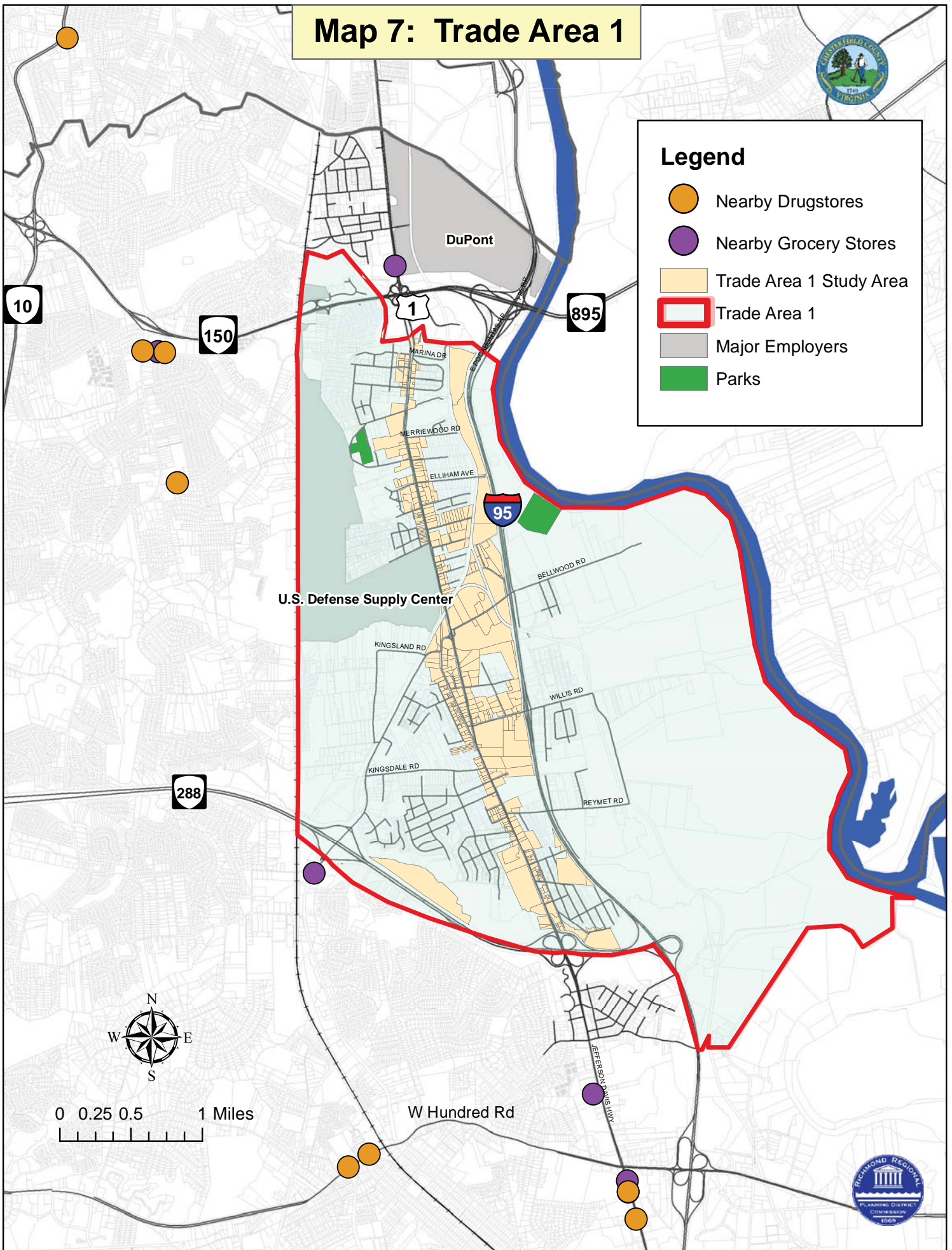
- 1% of all commuters driving along Jefferson Davis Highway, between Route 288 and Chippenham Highway
- 2.4% of commuters along I-95, between Route 288 and Willis Road
- 25% of the work force in the market area
- 10% of visitors to Bensley Park and Drewry's Bluff

Map 7: Trade Area 1



Legend

-  Nearby Drugstores
-  Nearby Grocery Stores
-  Trade Area 1 Study Area
-  Trade Area 1
-  Major Employers
-  Parks





Market Analysis Results

The purpose of studying this trade area was to determine if a small retail anchor such as a grocery store or drugstore could be supported by the current density of housing, and if not, how much residential density would need to increase to support these types of uses. A sensitivity analysis (baseline scenario as well best case vs worst case to support an anchor) was performed for this trade area, shown in the Appendix, in which a market analysis was performed based on the following scenarios:

- Existing current housing density, assuming 25% of dollars leaked outside the trade area - existing baseline scenario.
- Best case scenario to support a grocery store - assuming 25% of dollars leaked outside the trade area.
- Worst case scenario to support a grocery store - assuming 50% of dollars leaked outside the trade area.
- Best case scenario to support a drugstore - assuming 25% of dollars leaked outside the trade area.
- Worst case scenario to support a drugstore store - assuming 50% of dollars leaked outside the trade area.

Given the current density in trade area 1 with the baseline scenario, the market cannot support either a grocery store or drugstore. However, there appears to be an unmet demand for other types of goods and services, which include the following:

- Specialty food store (health food store, bakery/bagel shop)
- Major appliance store
- Women and girl's apparel store
- Footwear store
- Electronics store
- Medical office
- Pet store/Toy store
- Beauty salon
- Tobacco Products store

Table 3, below, shows the results of the sensitivity analysis of the unmet demand model. The results indicate the grocery store will take the least number of new households to support such an anchor. In the best case scenario to support a grocery store, the current residential density in trade area 1 needs to increase by a factor of 1.6, or an increase of 2,224 additional households. In contrast, to support a drugstore in the best case scenario the residential density needs to increase by a factor of 2, or an increase of 3,707 additional households.

Table 3: Summary of Supportable Densities in Trade Area 1

	Dollar Leakage	Density Factor	HH/Acres*	Households
**Baseline Scenario (Current Density)	n/a	1	1.9	3,707
Best Case Scenario to Support a Grocery Store	25%	1.6	2.9 - 3.1	5,600 - 6,100
Worst Case Scenario to Support a Grocery Store	50%	2.8	5.1 - 5.3	10,000 - 10,500
Best Case Scenario to Support a Drugstore	25%	2	3.6 - 3.9	7,100 - 7,600
Worst Case Scenario to Support a Drugstore	50%	3.5	6.5 - 6.7	12,700 - 13,200

* Densities based off Chesterfield's current residential zoning in trade area 1.

** Number of households based on 2005-2009 five year American Community Survey estimates



Trade Area 2

Unlike trade area 1, trade area 2 is not as physically constrained. Although there is a relatively high toll to the east on Pocahontas Parkway, it is very accessible to the City of Richmond to the north and the adjacent parts of Chesterfield County to the west. Trade area 2 already has a grocery store anchor in Food Lion, and since this anchor already exists, the model was developed to determine where the unmet demand exists for complementary retail uses.

While trade area 1 emphasizes the required density to support an anchor, the market analysis for trade area 2 focuses on where the unmet demand is for goods and services based on the current density. Trade area 2 also differs from trade area 1 in that there are many competing business establishments within the trade area, but outside the study area, all of which are inputted into the model, as shown in Map 3.

Basic Assumptions

The model also factors in possible scenarios where dollars are captured by trade area 2 from commuters, nearby workforce, and visitors. The following capture rates used in the model development of this trade area are assumed:

- 1% of all commuters on Jefferson Davis Highway, between Chester Road and the County line
- 1% of all commuters on Chippenham Parkway, between Hopkins Road and I-95
- 25% of the workforce in the market area
- 10% of all visitors to Bensley Park and Drewry's Bluff

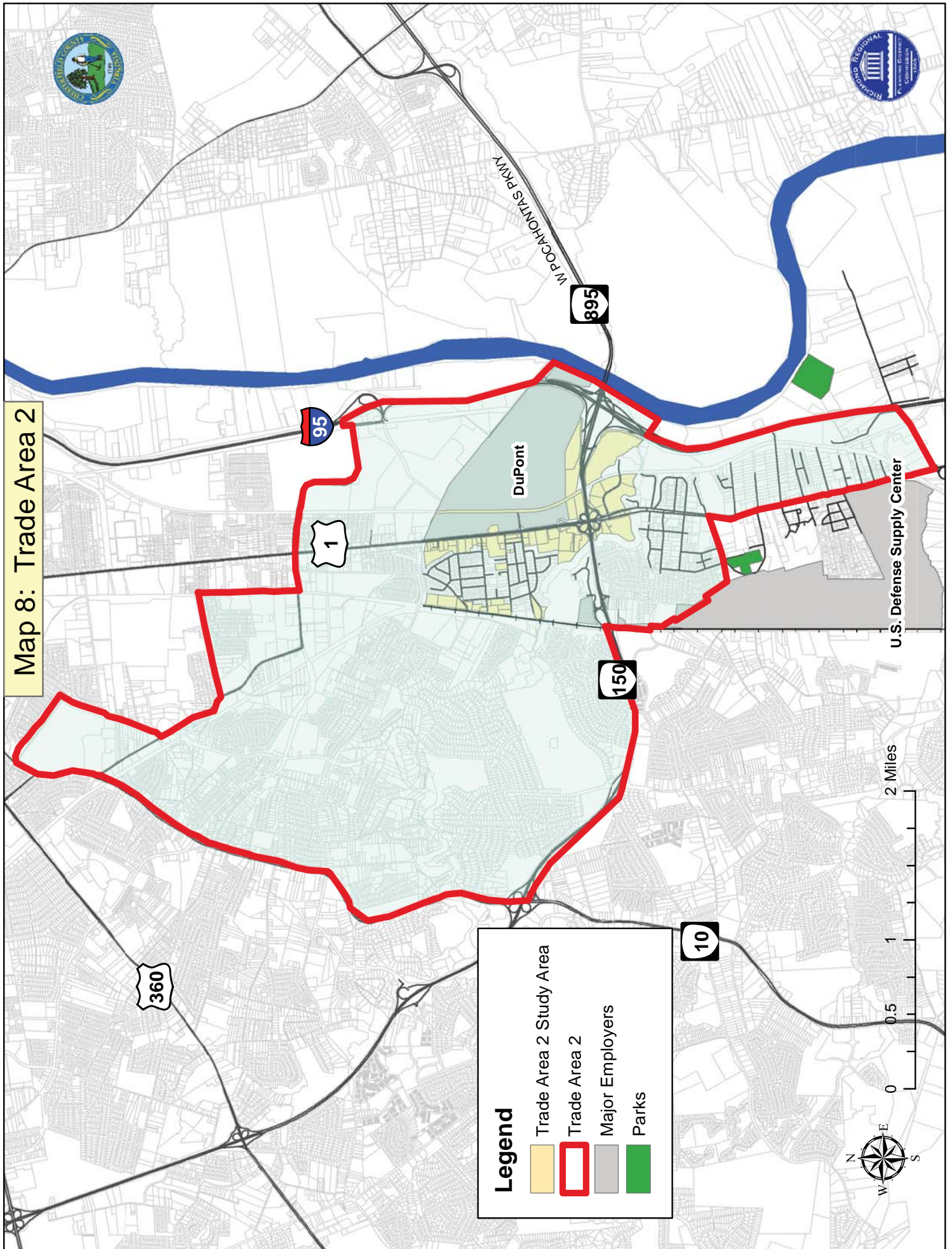
Market Analysis Results

A sensitivity analysis was performed for trade area 2, using a best case scenario (assuming 25% of household dollars leak outside the trade area), and a worst case scenario (assuming 50% of household dollars leak outside the trade area). Since this trade area is significantly more permeable than trade area 1 and there is a great amount of competition within the market area a 50% dollar leakage is assumed to occur. Interestingly enough there is little difference between worst and best case scenarios for the unmet demand. The Appendix shows a more detailed look at the results for trade area 2. The following shows the unmet demand for the worst case scenario in trade area 2; includes the following possible retail services:

- Specialty food store (health food store, bakery/bagel shop)
- Laundry mat
- Major appliance store
- Small appliance store (kitchen store, beds/mattresses)
- Florist
- Men and boy's apparel store
- Women and girl's apparel store
- Footwear store
- Jeweler
- Medical office
- Electronics store
- Pet store/ Toy store
- Tobacco products store



Map 8: Trade Area 2





VI. Future Residential Capacity - What If Scenario?

As indicated in the market analysis, the current residential density of trade area 1 or 2 will not support a new anchor such as a grocery store or drugstore to serve the community. The Study then looked at what outward potential may exist to create more demand for these types of services, especially in trade area 1. Chesterfield County is in the process of updating their Comprehensive Plan. Part of the update process to the comprehensive plan is updating the future land use, but it has not been officially adopted. It is difficult to accurately predict the future residential capacity of the Jefferson Davis Corridor.

Table 4, shows a conservative estimate of the potential future residential capacity taking into consideration current dwelling units and vacant parcels which may be used as future residential land use. Additionally, four residential developments are planned, although they are still in the preliminary stages, including Shady Hill, Riverwalk on the James, Flippo Mixed Use, and Winchester Forest. Map 9 illustrates where these proposed developments may occur along the corridor. Altogether, residential dwelling units add up to just under 5,900 - approaching the best case scenario to support a grocery store in trade area 1. This indicates it is certainly possible for future demand to support a mid-size retail anchor with increased housing stock and higher density.

Table 5: Future Residential Land Use Capacity

Category/Development	Acres	Future Residential Density ¹	residential capacity in dwelling units
Current Dwelling Units ²	1,009	n/a	3,707
Vacant Parcels in Suburban Residential Community ³	222	3 to 6 Dwellings/acre	899
Prospective Residential Developments			
Shady Hill	32	6 to 8 Dwellings/acre	368
Riverwalk on the James	81	3 to 6 Dwellings/acre	298
Flippo Mixed Use	16	6 to 8 Dwellings/acre	275
Winchester Forest	40	3 to 6 Dwellings/acre	105
Total			5,652

1. Revised Draft Land Use Plan, Chesterfield County, 2011. The Plan has not been formally adopted and is subject to additional changes and alterations

2. Dwelling units data retrieved by 2005-2009 5-year American Community Survey Estimates

3. Used 4.5 dwellings/acre to calculate residential capacity in dwelling units. This is the remaining land use for Suburban Residential Community after taking into account current dwelling units and vacant parcels. Also factored in 10% of vacant parcels will be undevelopable due to flood plains and slopes of greater than 15%.



Map 9: Future Land Use and Prospective Residential Development



Legend

- Vacant Parcels in Suburban Residential Community
- Prospective Residential Developments

Future Land Use

- Conservation/Recreation
- Mixed Employment Center
- Medium Residential Community
- Manufacturing Center
- Regional Corridor
- Suburban Residential Community

Winchester Forest

Riverwalk on the James

Shady Hill

Flippo Mixed Use



0 0.25 0.5 1 Miles



Revised Draft Land Use Plan, Chesterfield County, 2011. The plan has not been formally adopted and is subject to additional changes and alterations.



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VII. Opportunity Sites

Site Selection Process

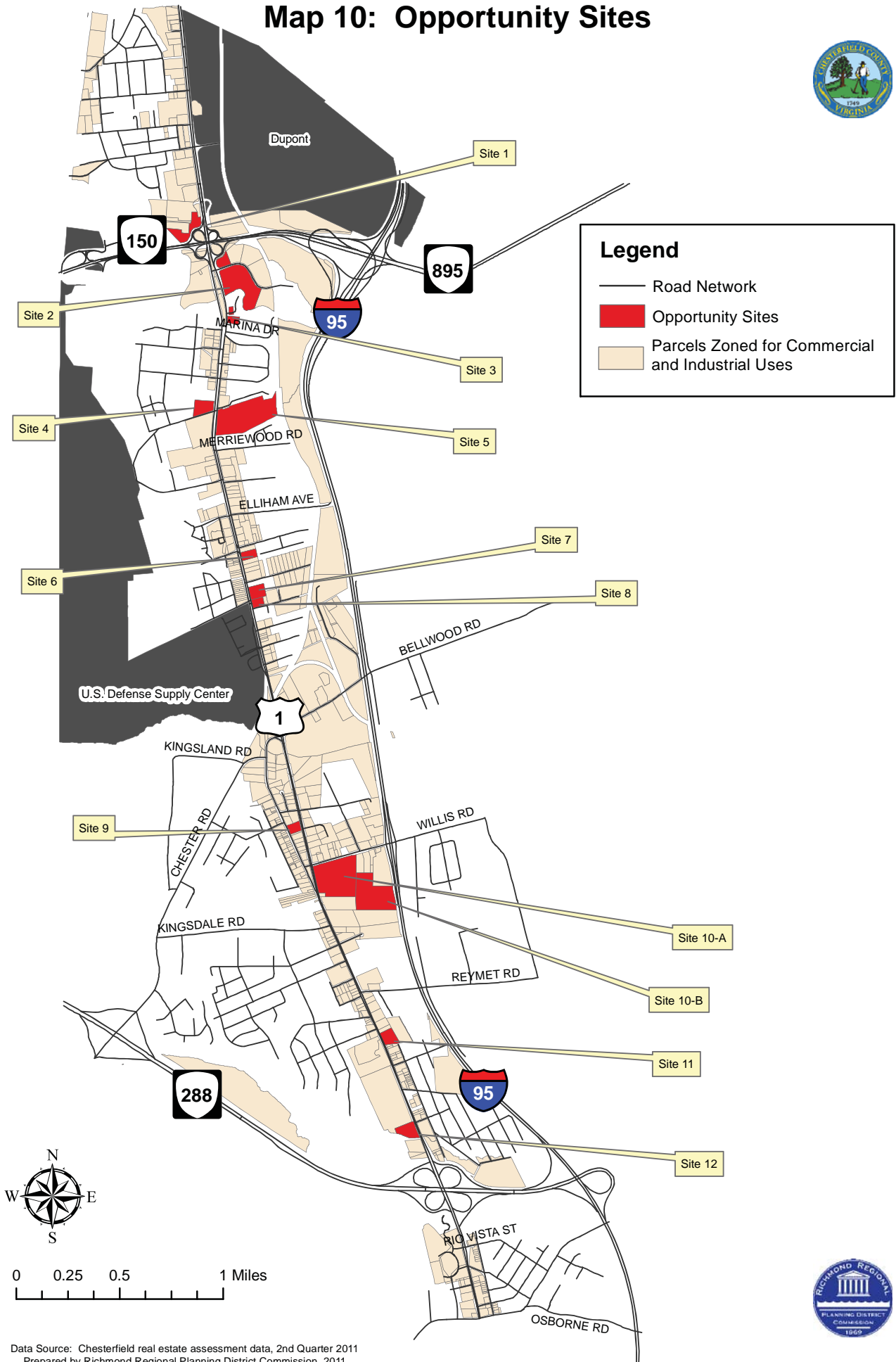
The goal of this revitalization study is to identify economic opportunities along the Jefferson Davis Corridor. Using the physical and market analysis findings, twelve commercial opportunity sites were identified as offering the greatest potential for future development efforts (Map 10). First, as described previously, the building to land value was used to narrow the sites down to parcels that were either vacant or had structures worth less than the land. Location was a critical determinant in the site selection process, making sure all potential sites had street frontage to the corridor. Visibility was another important factor in determining the most feasible sites. Obviously developers will be attracted to the most visible sites, that are located near major intersections along the corridor. Efforts on the site selection process were concentrated between Chippenham Parkway and Route 288, as this stretch of the corridor was considered the least likely to become naturally invigorated by the market.

An initial site selection was completed by RRPDC staff and revised by County staff. After the final sites were identified all sites were then reviewed with the County Department of Utilities and Transportation to address any infrastructure concerns such as utility and vehicular accessibility.



Illustrative of typical redevelopment site plan

Map 10: Opportunity Sites



Data Source: Chesterfield real estate assessment data, 2nd Quarter 2011
 Prepared by Richmond Regional Planning District Commission, 2011





Site Specifics

The following details the each opportunity site listed in Map 10, including parcel information, utility services, real estate assessment data, and transportation concerns. Comments made by Chesterfield's Department of Transportation (CDOT) are for guidance only. Aerials of each site are shown as well.

Site 1

- Address: 5802 Jefferson Davis Highway
- Acres: 4.9
- Owner: MFB Chesterfield LLC
- Location: near the intersection of Chippenham and Jeff Davis
- Utility services:
 - ◊ Water: Public water is available to the parcel through an 8-inch waterline looped around the existing buildings, crossing Site 1.
 - ◊ Sewer: Public sewer is available; laterals to the parcel were installed in 1979; since the parcel has split since the private sewer lines were installed, a portion will need to be converted to public (inspection of the line and make any repairs necessary to convert to public sewer).
- CDOT comments:
 - ◊ No direct access to Route 1/301 or Chippenham Parkway. Access to be provided by existing shipping center drive.
- Assessment Data: Improvement value - \$0; Land - \$555,000; Total Assessment - \$555,000
- Land Use: Vacant
- Zoning: Community Business (C-3)
- Other information: Vacant land located in front of parking lot of Flea Market and Food Lion

Site 1: 5802 Jefferson Davis Highway



0 50 100 200 Feet

Data Source: Bing Maps Hybrid, 2011





Site 2

- Address: 6101 Jefferson Davis Highway
- Acres: 17.3
- Owner: Watercross Development Inc
- Location: north of Falling Creek Apartments, southeast of the inter section of Chippenham and Jeff Davis
- Utility services:
 - ◊ Water: 16-inch waterline across the front of the parcel along Jefferson Davis Highway and an 8-inch waterline along Station Road.
 - ◊ Sewer: 48-inch trunk sewer line along the southern parcel line parallel to Falling Creek and an 8-inch sewer line across the parcel from Station Road to the 48-inch trunk line; sewer lines appear deep enough to serve entire parcel.
- CDOT comments:
 - ◊ Southeast High Speed Rail NEPA Public Hearing Map shows Station Road being relocated through the property. Plans are preliminary. No direct vehicular access to Route 1/301. Access will be off of Station Road.
- Assessment Data: Improvement value - \$0; Land - \$664,800; Total Assessment - \$664,800
- Land Use: Vacant
- Zoning: General Industrial (I-2)
- Other information: Vacant, forested land - runs along the historic Falling Creek Iron Works

Site 2: 6101 Jefferson Davis Highway



0 62.5 125 250 Feet

Data Source: Bing Maps Hybrid, 2011

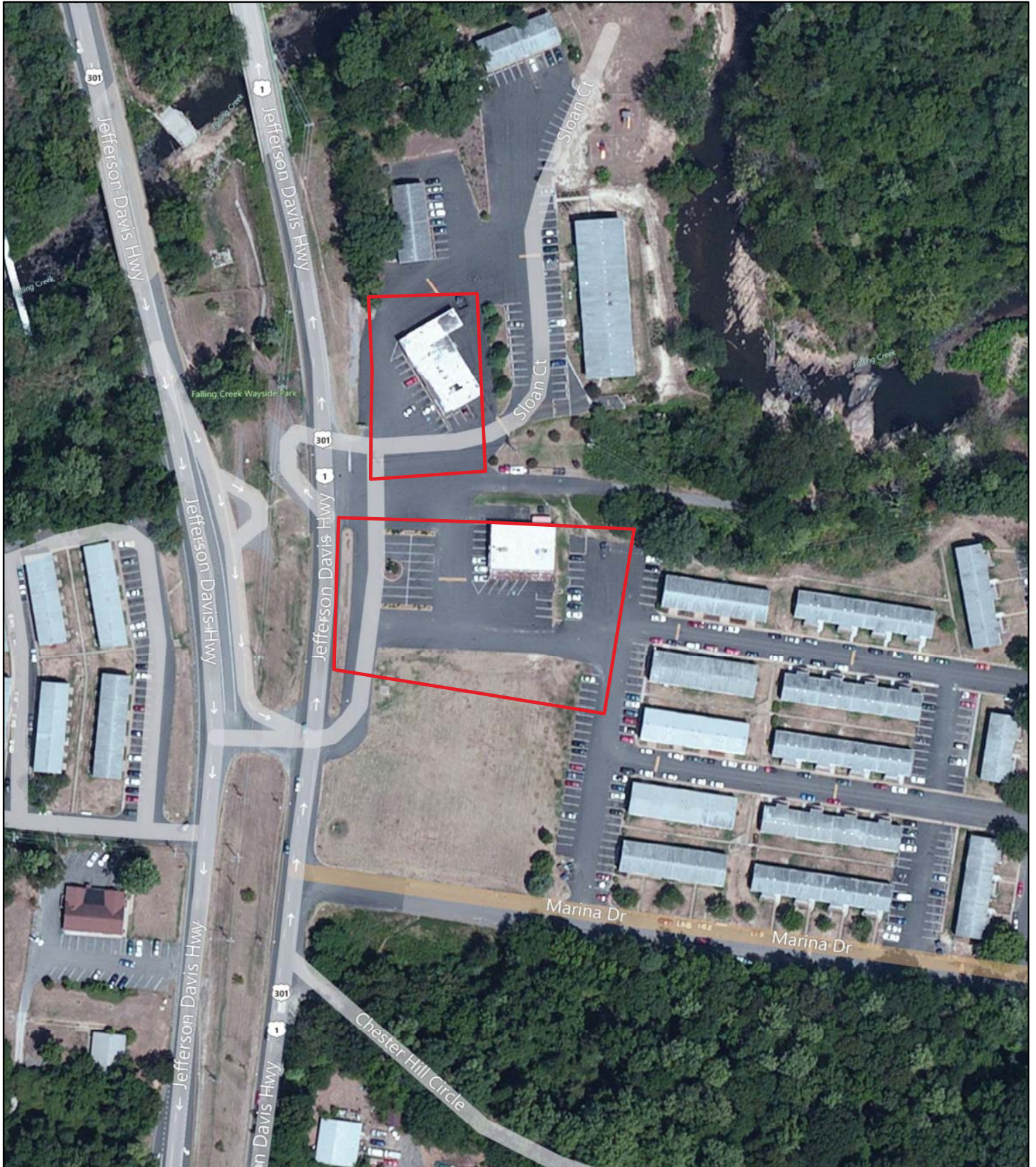




Site 3

- Address: 6305 Jefferson Davis Highway
- Acres: 1.8
- Owner: Chesterfield Limited Partnership
- Location: along Jeff Davis, just north of Marina Dr
- Utility services:
 - ◊ Water: 16-inch waterline across the front of the parcel; currently 3 meters serving different businesses (one 2-inch meter and two 5/8-inch meters); 2-inch meter and one 5/8-inch meter connected to 6-inch waterline behind building shared by laundry mat and convenience store; Carquest building connected to 6-inch waterline near NE corner of the building.
 - ◊ Sewer: Two businesses (laundry mat and convenience store) currently connected to public sewer; Carquest store is not connected to sewer and not known how this building would connect; needs to be investigated.
- CDOT comments:
 - ◊ Access to the south will be removed with the development of 6407 Jefferson Davis Hwy (owned by County).
- Assessment Data: Improvement value - \$159,200; Land - \$283,600; Total Assessment - \$442,800
- Land Use: Retail Commercial
- Zoning: Neighborhood Business (C-2)
- Other information: Businesses currently located here include Falling Creek Coin Laundry (assessed as poor condition), Auto Parts (assessed as fair condition), and Fast & Friendly Convenience Stores (assessed as poor condition). Adjacent to Falling Creek Apartments.

Site 3: 6305 Jefferson Davis Highway



0 37.5 75 150 Feet

Data Source: Bing Maps Hybrid, 2011





Site 4

- Address: 6750 Jefferson Davis Highway
- Acres: 3.8
- Owner: John and Betty Worden
- Location: northwest of the intersection of Swineford and Jeff Davis
- Utility services:
 - ◊ Water: 16-inch waterline along Jefferson Davis Highway and 12-inch waterline along Swineford Road; currently served by public water (1½-inch meter)
 - ◊ Sewer: Public sewer is available and structures on parcel are connected; appears to be private on-site lines; location of private lines unknown.
- CDOT comments:
 - ◊ Approved zoning case 07SN0338 and previous site plan for Wawa (08PR0258 - not approved). Zoning conditions: One access at north property line to Route 1/301, one access to Swineford Rd, 60 feet right-of-way dedication along Route 1/301 (from the centerline), and full cost of traffic signal at Route 1/Swineford, if warranted as determined by VDOT.
- Assessment Data: Improvement value - \$22,500; Land - \$546,900; Total Assessment - \$569,400
- Land Use: Mobile Home Park
- Zoning: Community Business (C-3)
- Other information: Trailer park homes currently located here.

Site 4: 6750 Jefferson Davis Highway



0 25 50 100 Feet
A scale bar with markings for 0, 25, 50, and 100 feet.

Data Source: Bing Maps Hybrid, 2011

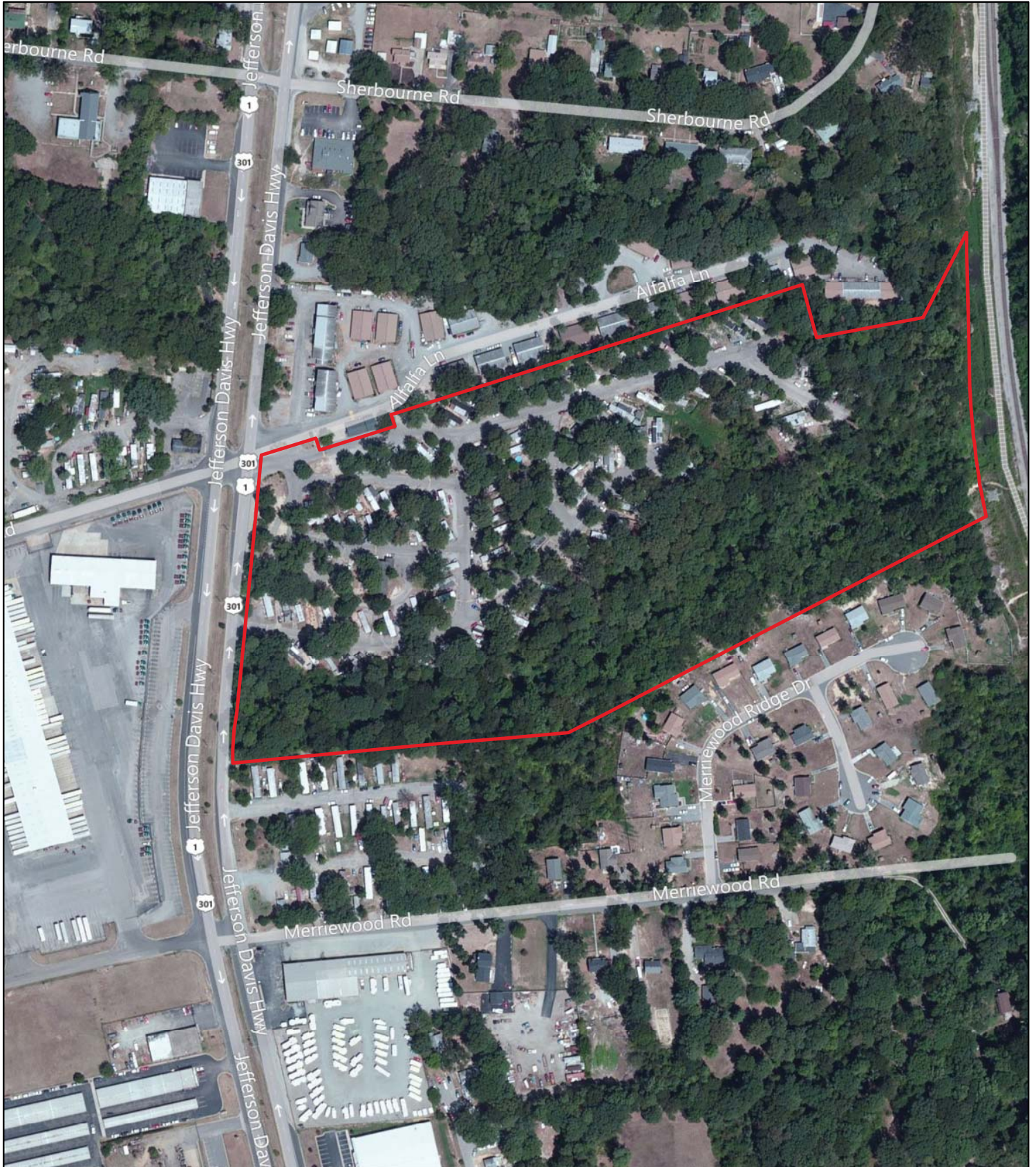




Site 5

- Address: 6811 Jefferson Davis Highway
- Acres: 24
- Owner: Shady Hill Corporation
- Location: southeast of the intersection of Swinford and Jeff Davis
- Utility services:
 - ◊ Water: 16-inch waterline along Jefferson Davis Highway; currently served by public water through two metered connections (1½-inch and 2-inch meters); a third connection point existed but the meter was removed.
 - ◊ Sewer: Public sewer is available and structures on parcel are connected; appears to be private on-site lines; location of private lines unknown.
- CDOT comments:
 - ◊ Full access at Route 1/Alfalfa Ln may need traffic signalization (if not warranted, then bond/letter of credit will be required) . Right-in/right-out access shall maximize spacing from Route 1/Alfalfa intersection. Northern access may require an access easement for shared access in the future. Dedicate 60 feet right-of-way along Route 1 (from the centerline). Currently, Alfalfa Ln is private. Public road (state maintained) road system will be required for townhomes in the back of the property. This will require road built and accepted by VDOT. Southeast High Speed Rail alignment is shown along the eastern property line per the NEPA Public Hearing Map.
- Assessment Data: Improvement value - \$126,900; Land - \$1,376,200; Total Assessment - \$1,503,100
- Land Use: Mobile Home Park
- Zoning: Manufactured Home Park (MH-1)
- Other information: Trailer park homes currently located here.

Site 5: 6811 Jefferson Davis Highway



0 70 140 280 Feet

Data Source: Bing Maps Hybrid, 2011





Site 6

- Address: 7511 Jefferson Davis Highway
- Acres: 1.9
- Owner: Oscar A Quitanilla
- Location: near the corner of Jeff Davis and Alcott Rd
- Utility services
 - ◊ Water: 16-inch waterline across the front of the parcel; currently served by public water (one 5/8-inch meter).
 - ◊ Sewer: Public sewer is available and structures on parcel are connected; may be private on-site lines.
- CDOT comments:
 - ◊ Dedicate 60 feet right-of-way along Route 1 (from centerline). One access adjacent to the southern property line and provide access easement to allow access to be shared with adjacent property to the south.
- Assessment Data: Improvement value - \$40,500; Land - \$297,100; Total Assessment - \$337,600
- Land Use: Service Commercial
- Zoning: General Business (C-5)
- Other information: Family Motel currently located here (assessed as poor condition). Adjacent to Winchester Greens.

Site 6: 7511 Jefferson Davis Highway



0 25 50 100 Feet

Data Source: Bing Maps Hybrid, 2011





Site 7

- Address: 7725 Jefferson Davis Highway
- Acres: 3
- Owner: T M P LLC
- Location: near the corner of Jeff Davis and Gayland Ave
- Utility services:
 - ◊ Water: 16-inch waterline across the front of the parcel; currently served by public water (one 1-inch meter).
 - ◊ Sewer: Public sewer is available and structures on parcel are connected; appears to be private on-site lines; location of private lines unknown.
- CDOT comments:
 - ◊ One access approximately 100 feet north of southern property line. Dedicate 60 feet right-of-way along Route 1 (from centerline). An access easement to adjoining properties may be required.
- Assessment Data: Improvement value - \$64,500; Land - \$354,600; Total Assessment - \$419,100
- Land Use: Mobile Home Park
- Zoning: Community Business (C-3)
- Other information: Trailer park homes currently located here.

Site 7: 7725 Jefferson Davis Highway



0 25 50 100 Feet

Data Source: Bing Maps Hybrid, 2011





Site 8

- Address: 7811 Jefferson Davis Highway
- Acres: 1.5
- Owner: Bellwood Terrace Apts LLC
- Location: adjacent to Site 4, to the south
- Utility services:
 - ◊ Water: 16-inch waterline across the front of the parcel and a 6-inch waterline along Noel Street to the south of the parcel
 - ◊ Sewer: Public sewer is not current at the parcel, but the manhole at the intersection of Noel Street and Noel Court appears to be deep enough to extend and serve this parcel.
- CDOT comments:
 - ◊ Access from Noel St and improve road to state standards. No access to Route 1 - maybe get access via 7725 Jefferson Davis Hwy by access easement. 60 feet right-of-way dedication along Route 1 (measured from centerline).
- Assessment Data: Improvement value - \$0; Land - \$242,700; Total Assessment - \$242,700
- Land Use: Vacant
- Zoning: Community Business (C-3)
- Other information: land is vacant

Site 8: 7811 Jefferson Davis Highway



0 25 50 100 Feet

Data Source: Bing Maps Hybrid, 2011

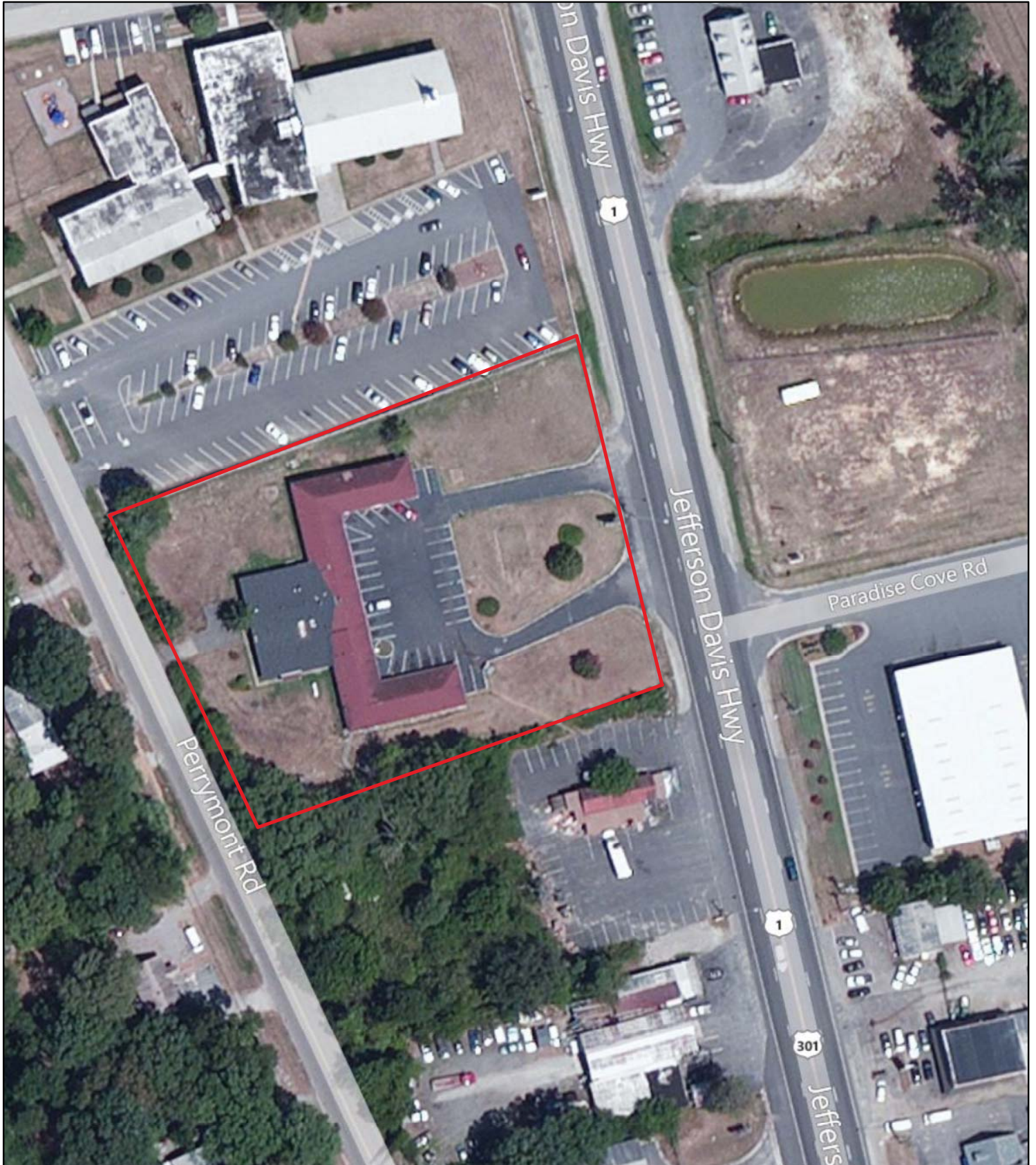




Site 9

- Address: 8924 Jefferson Davis Highway
- Acres: 1.8
- Owner: Babubhai and Ila Patel
- Location: near the intersection of Jeff Davis and Normandale Ave
- Utility services:
 - ◊ Water: 16-inch waterline along Jefferson Davis Highway on northbound side; 8-inch waterline along Perrymont Road; currently served by public water with a 1-inch meter
 - ◊ Sewer: Public sewer is available and structures on parcel are connected.
- CDOT comments:
 - ◊ One access to Route 1/301 towards the southern property line to align with access on the east side of Route 1. Provide an access easement to the southern properties for shared access in the future. Dedicate 60 feet right-of-way along Route 1 and 45 feet along Perrymont Rd (measured from the centerline).
- Assessment Data: Improvement value - \$46,600; Land - \$268,300; Total Assessment - \$314,900
- Land Use: Service Commercial
- Zoning: Corporate Office (O-2)
- Other information: Virginia Motel (assessed as poor condition) currently located here.

Site 9: 8924 Jefferson Davis Highway



0 25 50 100 Feet

Data Source: Bing Maps Hybrid, 2011





Site 10-A

- Address: 9201 Jefferson Davis Highway
- Acres: 21.9
- Owner: Petersburg Pike Drive In Corp
- Location: intersection of Jeff Davis and Willis Rd
- Utility services:
 - ◊ Water: 24-inch waterline across parcel fronting along Jefferson Davis Highway; 16-inch waterline across parcel part way along Willis Road; currently served by public water with a 2-inch meter.
 - ◊ Sewer: Public sewer is available and structures on parcel are connected; location of any private on-site lines is unknown.
- CDOT comments:
 - ◊ Need specific information on user before preliminary comments on access and improvements can be provided.
- Assessment Data: Improvement value - \$1,000; Land - \$1,101,300; Total Assessment - \$1,102,300
- Land Use: Retail Commercial
- Zoning: General Business (C-5)
- Other information: Surface parking area of old drive movie theatre - used as a flea market on the weekends.

Site 10A: 9201 Jefferson Davis Highway



0 40 80 160 Feet

Data Source: Bing Maps Hybrid, 2011





Site 10-B

- Address: 2341 Willis Road
- Acres: 17.3
- Owner: Petersburg Pike D
- Location: adjacent to site 10-A
- Utility services:
 - ◊ Water: This parcel has no road frontage or direct access to public water; 16-inch waterline along Willis Road could be accessed through and easement across Site 10A; 24-inch waterline along Jefferson Davis Highway could also be accessed through an easement across Site 10A.
 - ◊ Sewer: 8-inch sewer line along southern property line; parcel drains to the south eastern corner; manhole located at south eastern corner appears to be deep enough to extend and serve entire parcel.
- CDOT comments:
 - ◊ No road frontage - will need to acquire access through another parcel.
- Assessment Data: Improvement value - \$0; Land - \$554,600; Total Assessment - \$554,600
- Land Use: Vacant
- Zoning: General Business (C-5)
- Other information: Surface parking area of old drive movie theatre - used as a flea market on the weekends.

Site 10B: 2341 Willis Road



0 55 110 220 Feet

Data Source: Bing Maps Hybrid, 2011





Site 11

- Address: 10107 Jefferson Davis Highway
- Acres: 3
- Owner: Gilbert C. Booker, Jr.
- Location: near the intersection of Jeff Davis and Velda Rd
- Utility services:
 - ◊ Water: 24-inch waterline across the front of the parcel; currently served by public water through two 5/8-inch meters.
 - ◊ Sewer: Public sewer is available to the parcel but structures are not currently connected; manhole at the end of Elkomin Avenue appears to be deep enough to extend sewer to serve the entire parcel.
- CDOT comments:
 - ◊ One access to Route 1 - will evaluate access location at preliminary site plan review. Dedicated 60 feet right-of-way along Route 1 (from the centerline).
- Assessment Data: Improvement value - \$58,100; Land - \$392,000; Total Assessment - \$450,100
- Land Use: Single Family
- Zoning: General Business (C-5)
- Other information: Residential housing unit located on the edge of the parcel and surface parking area.

Site 11: 10107 Jefferson Davis Highway



0 25 50 100 Feet

Data Source: Bing Maps Hybrid, 2011





Site 12

- Address: 10600 Jefferson Davis Highway
- Acres: 3.7
- Owner: Hoffman Communications Inc
- Location: intersection of Jeff Davis and Melba St
- Utility services:
 - ◊ Water: 24-inch waterline along Jefferson Davis Highway on northbound side; ¾-inch water service extends to parcel but 5/8-inch meter has been pulled from the box.
 - ◊ Sewer: Parcel is not currently served by public sewer; 42-inch trunk sewer line on adjacent property to the south appears to be deep enough to serve Site 13; would require crossing Proctors Creek to connect.
- CDOT comments:
 - ◊ One access to Route 1, align with Melba St intersection. Per conceptual plan for redevelopment of east side of Route 1, Melba St is to be closed and new intersection provided to the north. Dedicated 60 feet right-of-way along Route 1 (from the centerline).
- Assessment Data: Improvement value - \$39,500; Land - \$49,700; Total Assessment - \$89,200
- Land Use: Service Commercial
- Zoning: Community Business (C-3)
- Other information: 1 vacant building (assessed as dilapidated condition)

Site 12: 10600 Jefferson Davis Highway



0 25 50 100 Feet

Data Source: Bing Maps Hybrid, 2011

