



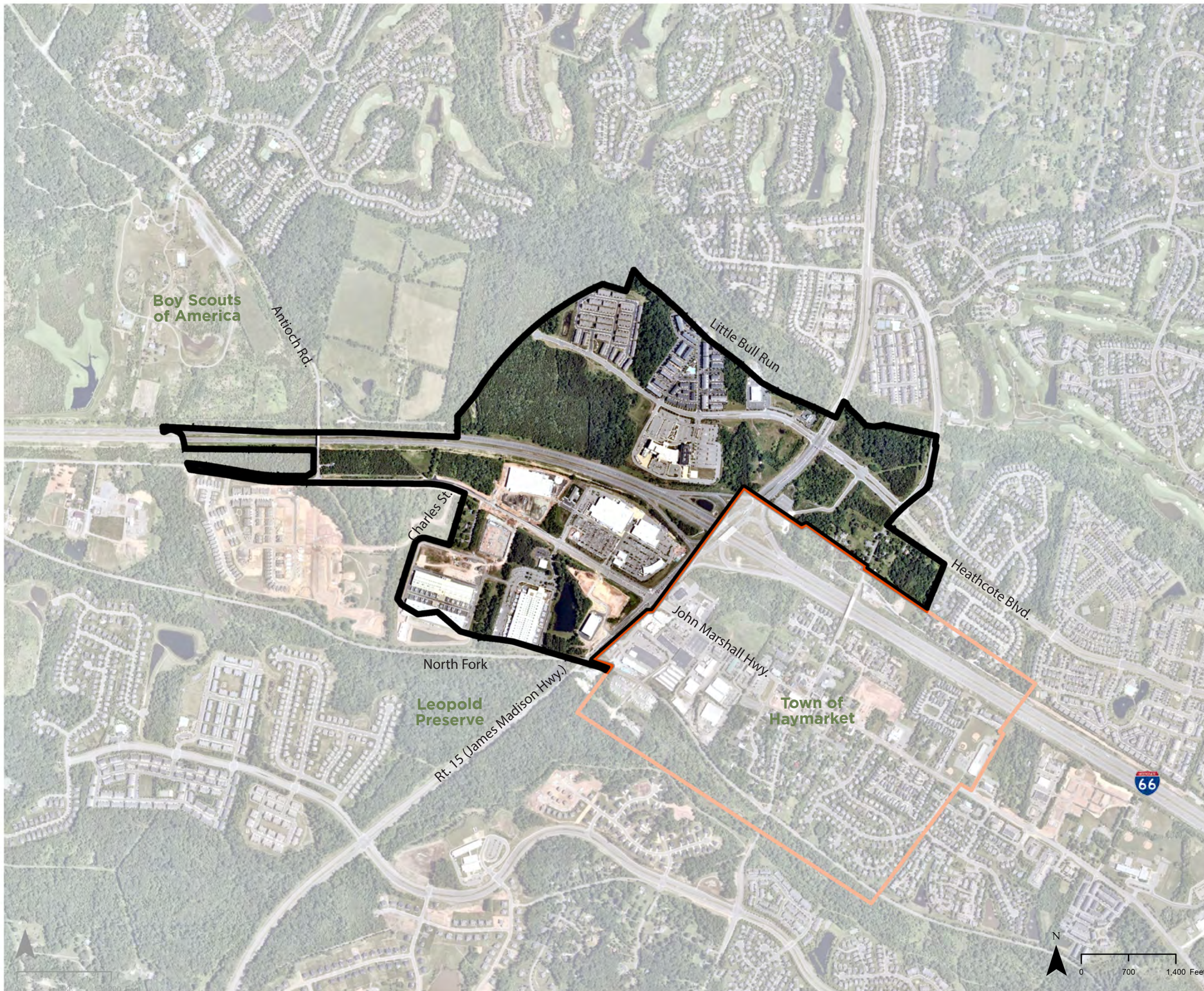
Prince William County Comprehensive Plan Update Land Use Elements | Activity Centers and Redevelopment Areas

Haymarket (I-66/RT 15) Activity Center Work Session
August 4, 2021
NN+RHI+RKG

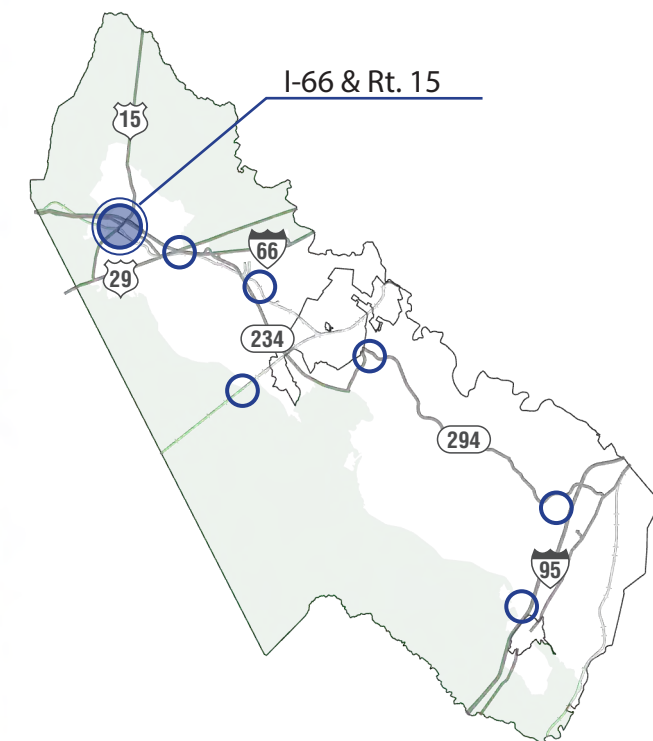
Draft

STUDY AREA

- 450 Acres (+/-)
- Located at the I-95 & Route 15 / James Madison Highway interchange in northern Prince William County
- Town of Haymarket along southeast eastern boundary
- Straddles edge of 'Rural Crescent'



KEY MAP



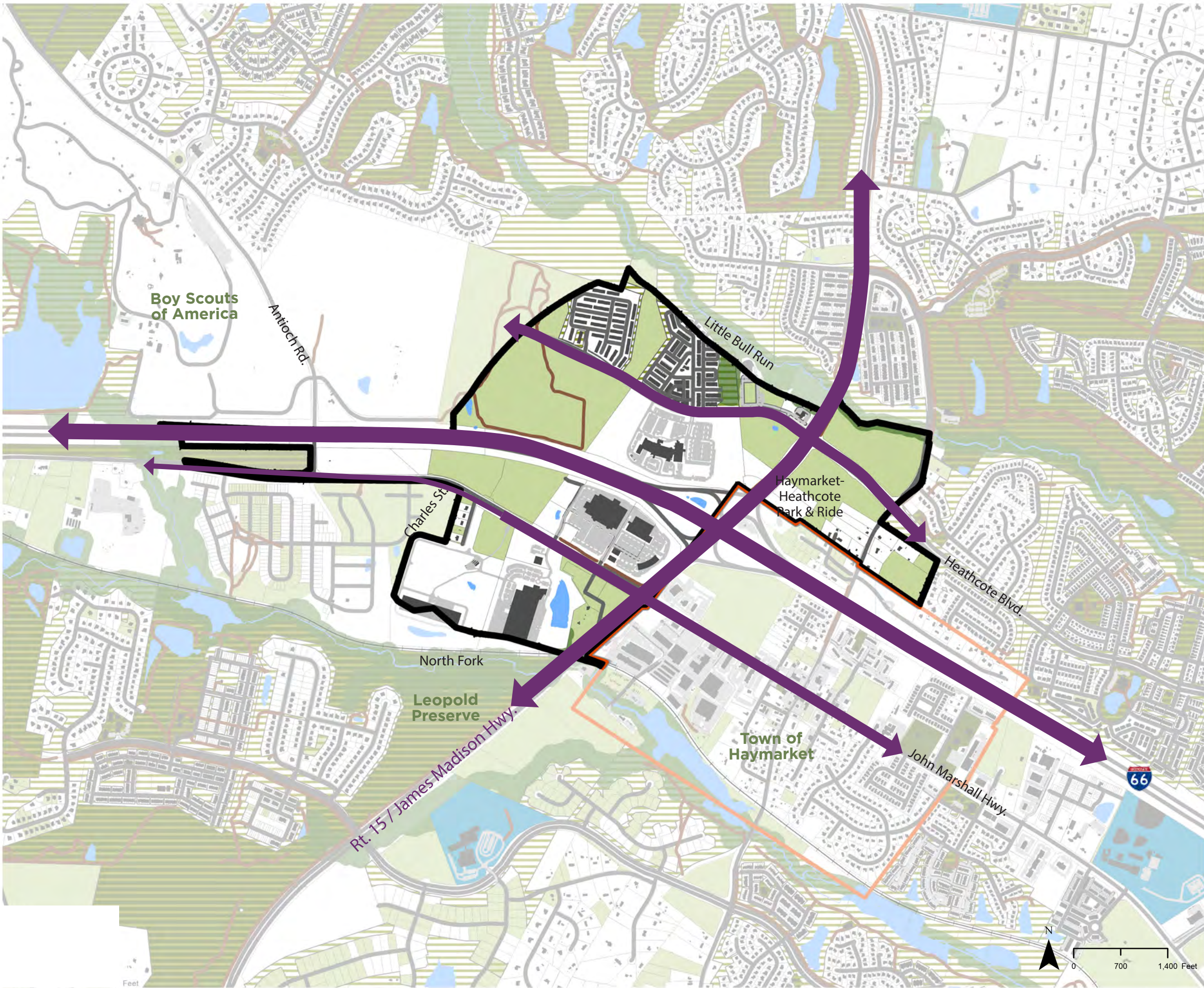
EXISTING CHARACTER (NORTH)



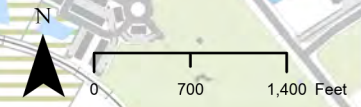
EXISTING CHARACTER (SOUTH)



EXISTING CONDITIONS



-  I-66 bisects the study area. Rt. 15 / James Madison Hwy and Heathcote Blvd. divides the area north / south.
-  Vacant land-- much of which is primed for redevelopment
-  Resource Protection Areas and floodplain along Little Bull Run and North Fork
-  Protected Open Spaces
-  Lepold's Preserve located along North Fork includes 7 miles of interpretive trails, old hardwood forests, wildflower meadows, rock formations, and water features
-  Overall, suburban land development patterns throughout the study area



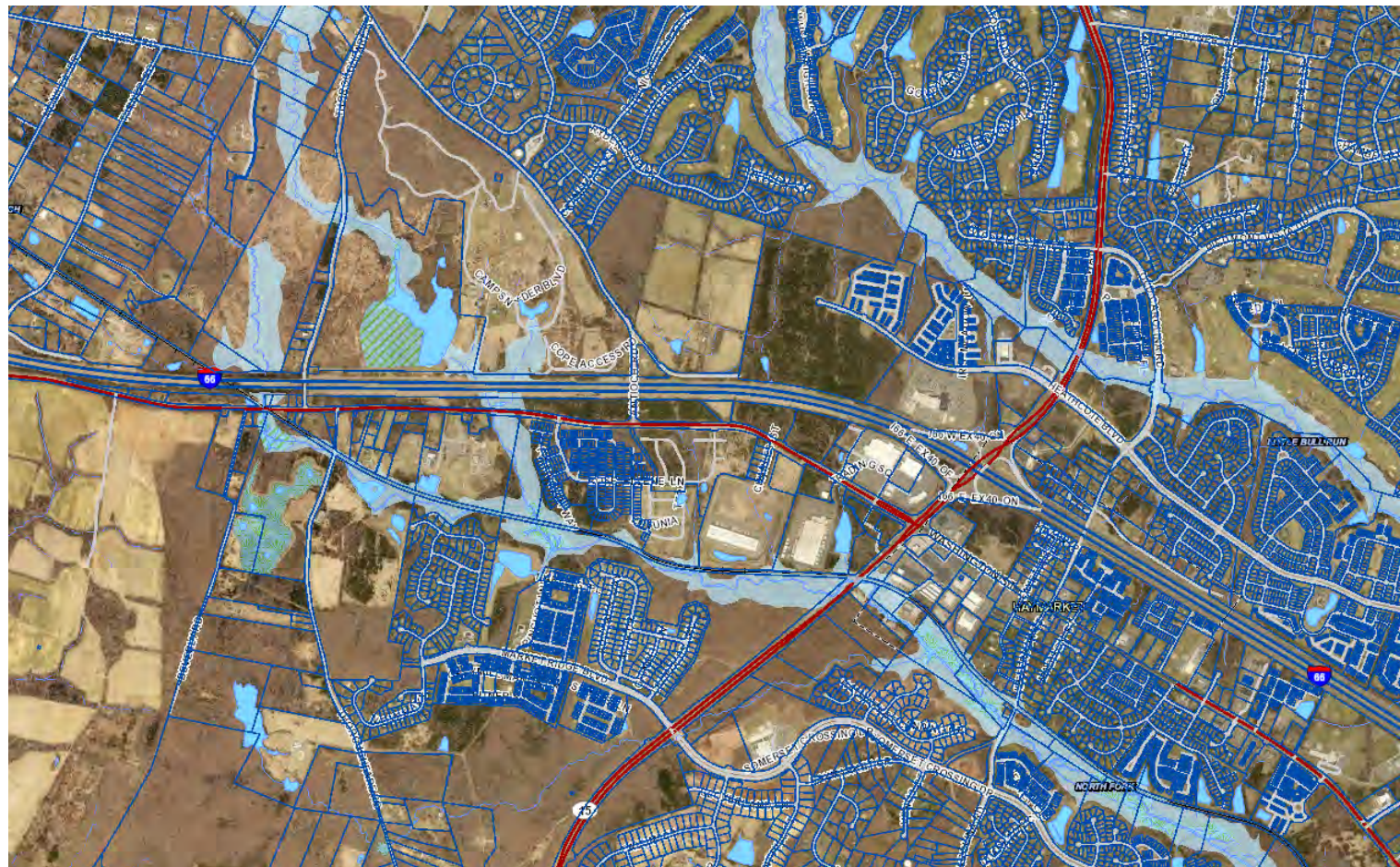


Historic Sensitivity Areas Parks / Open Space

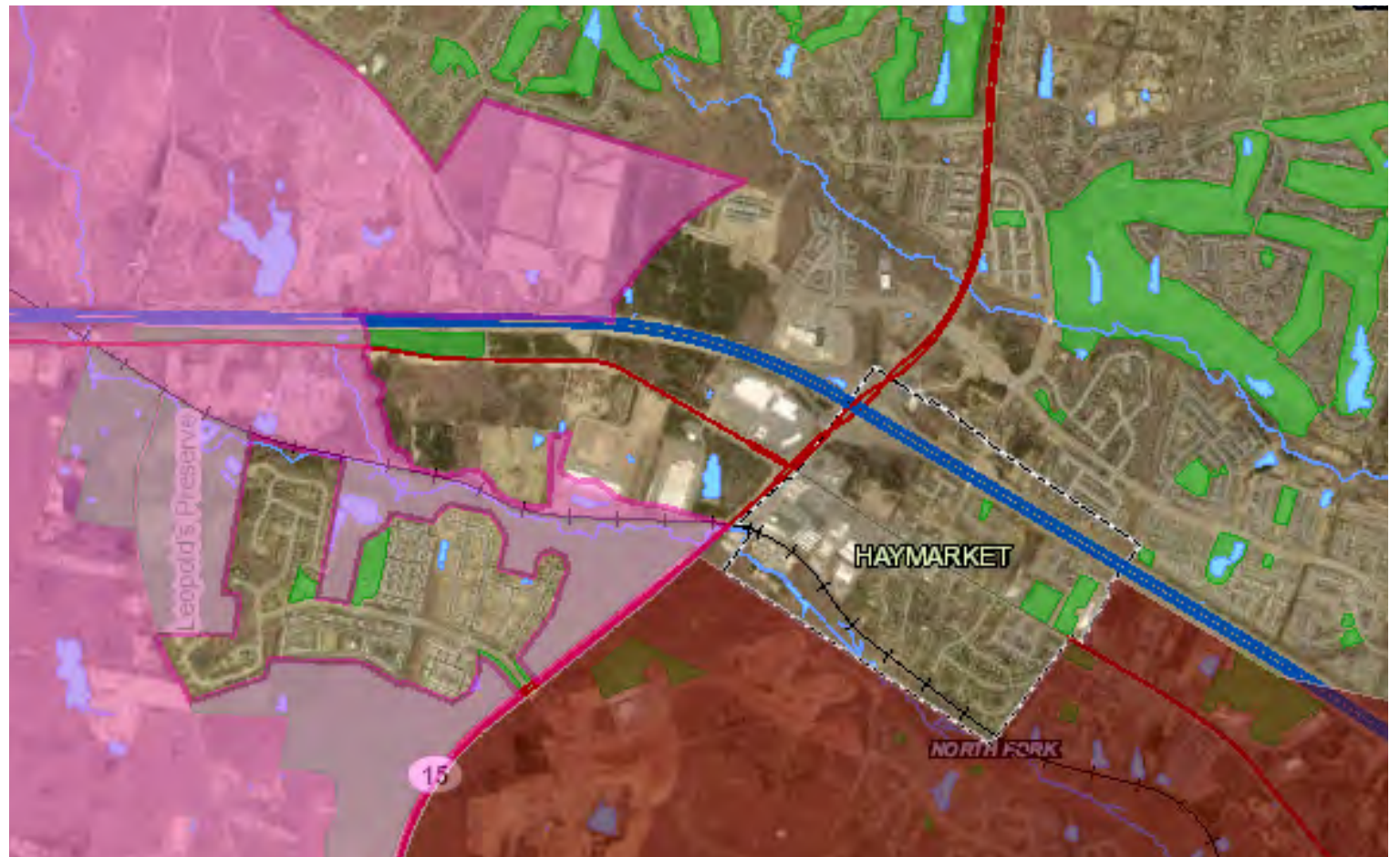


NATURAL / CULTURAL RESOURCES

Cemeteries



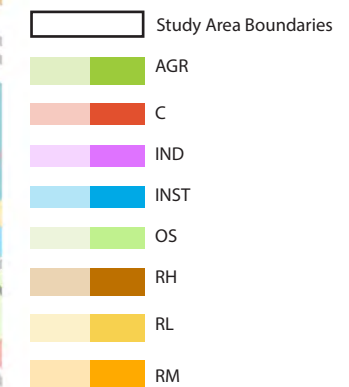
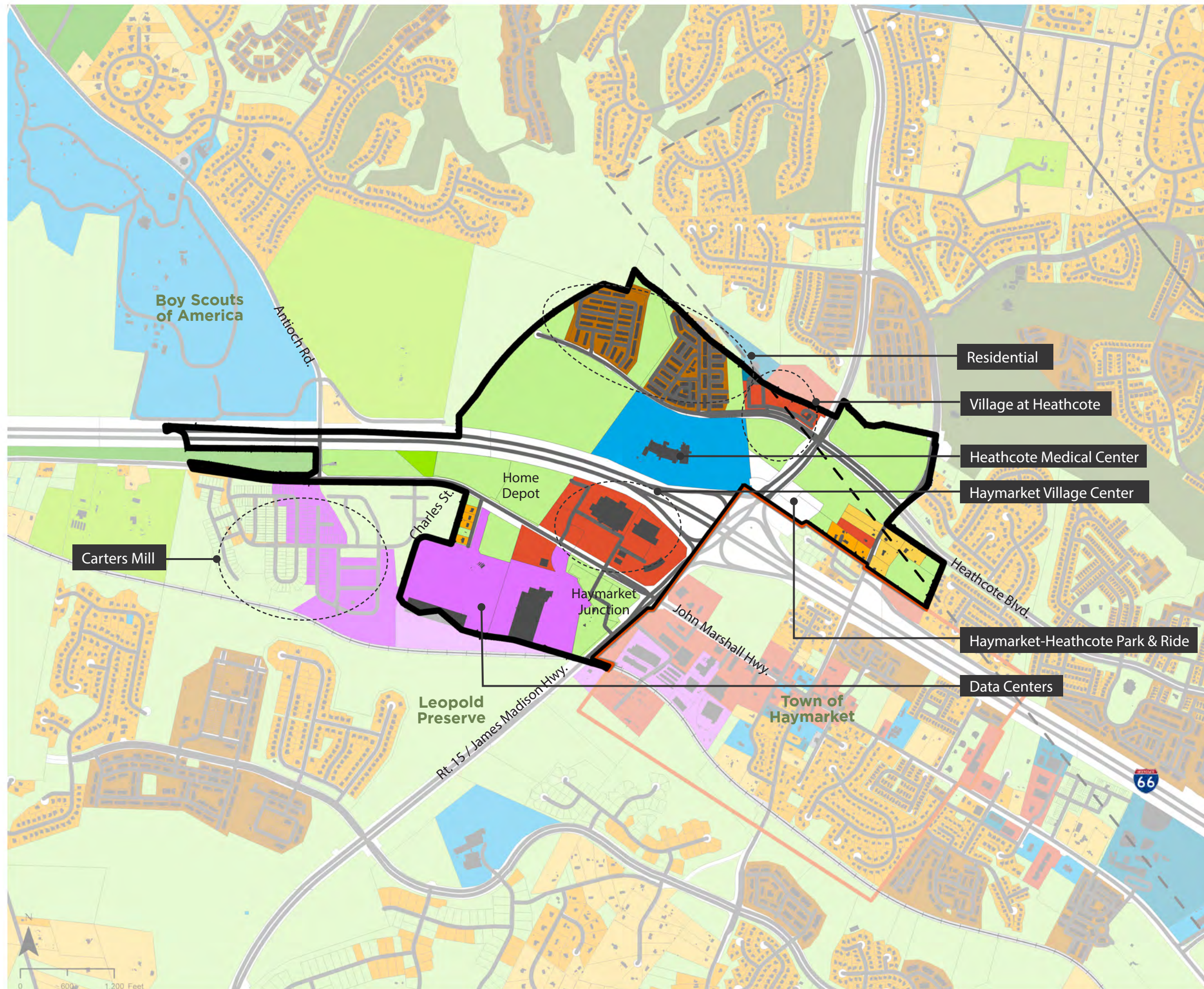
Floodplain



I-66 / RT. 29 Sector Plan Area Rural Area

EXISTING LAND USE

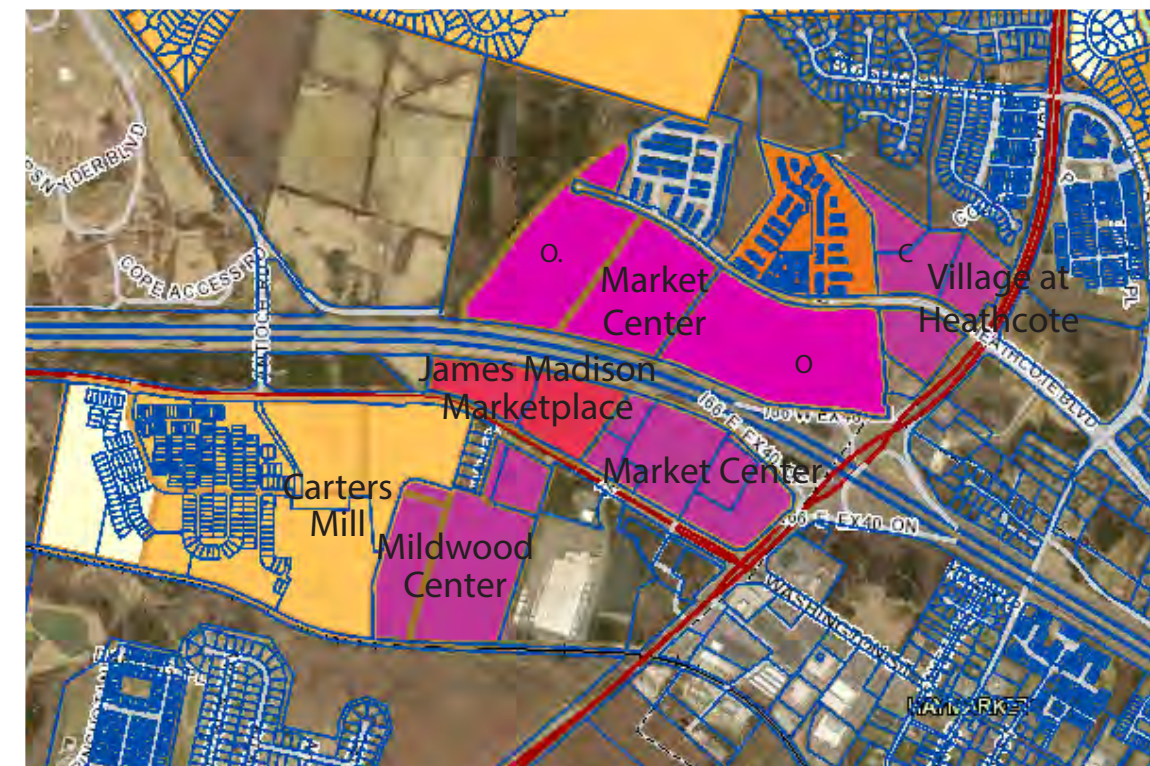
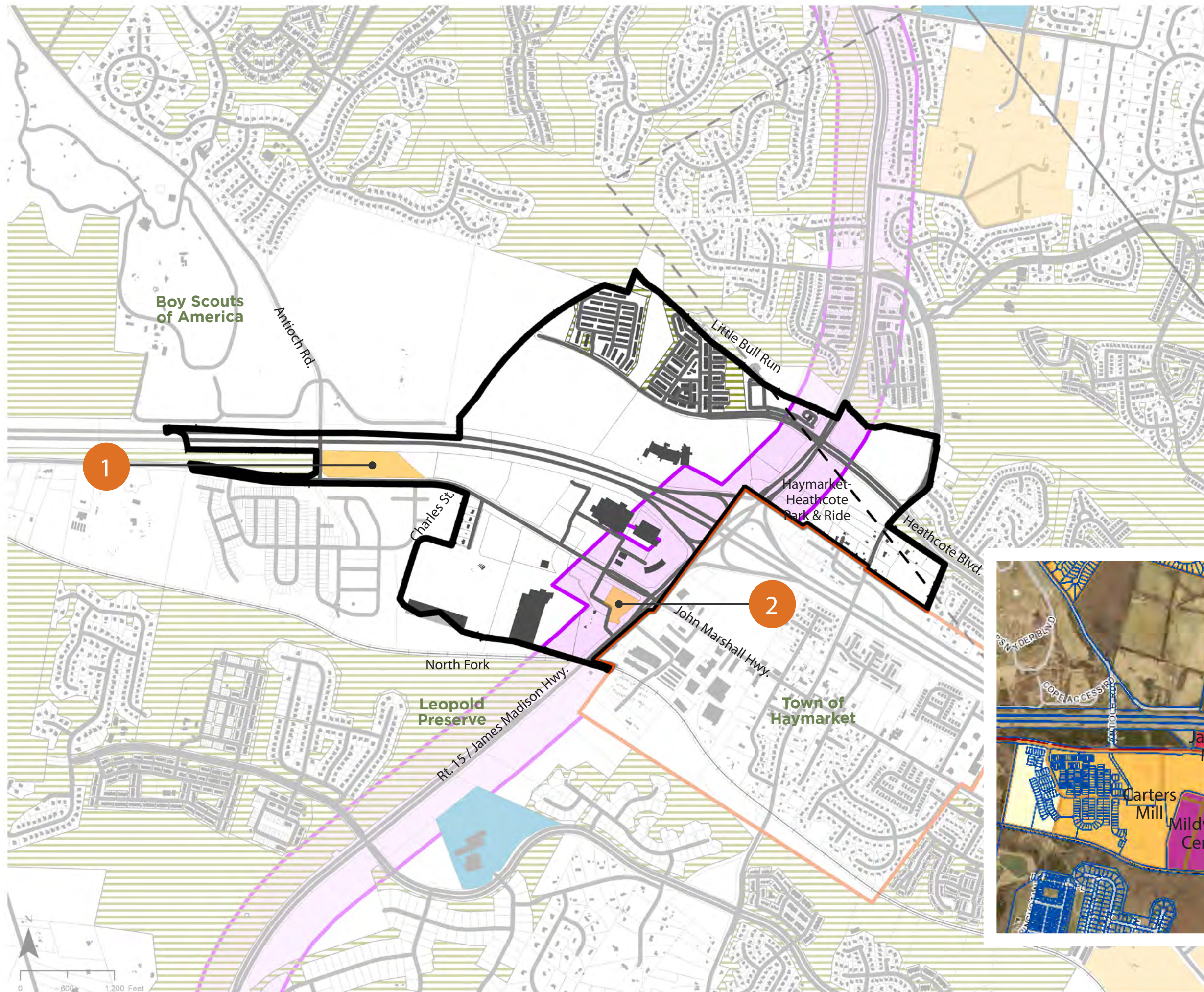
- South: John Marshall Hwy is defined by newer, active commercial development anchored by big-box retail. The corridor also includes light industrial and single family residential
- North: Newer, horizontal mixed-use medium intensity residential commercial, office and medical anchor (Heathcote Blvd.)



LAND DEVELOPMENT

1. Center at Haymarket- Rezone from A-1 Agricultural to O(M) Office Mid-Rise (Pending Planning Case)
2. Haymarket Motor Vehicle Fuel Station (Pending Planning Case)

Highway Overlay District - May include highway-oriented businesses such as car washes, quick service food stores, theaters, etc. The overlay encourages the development of shared driveways, internal site street networks, consistent architecture, and signage.

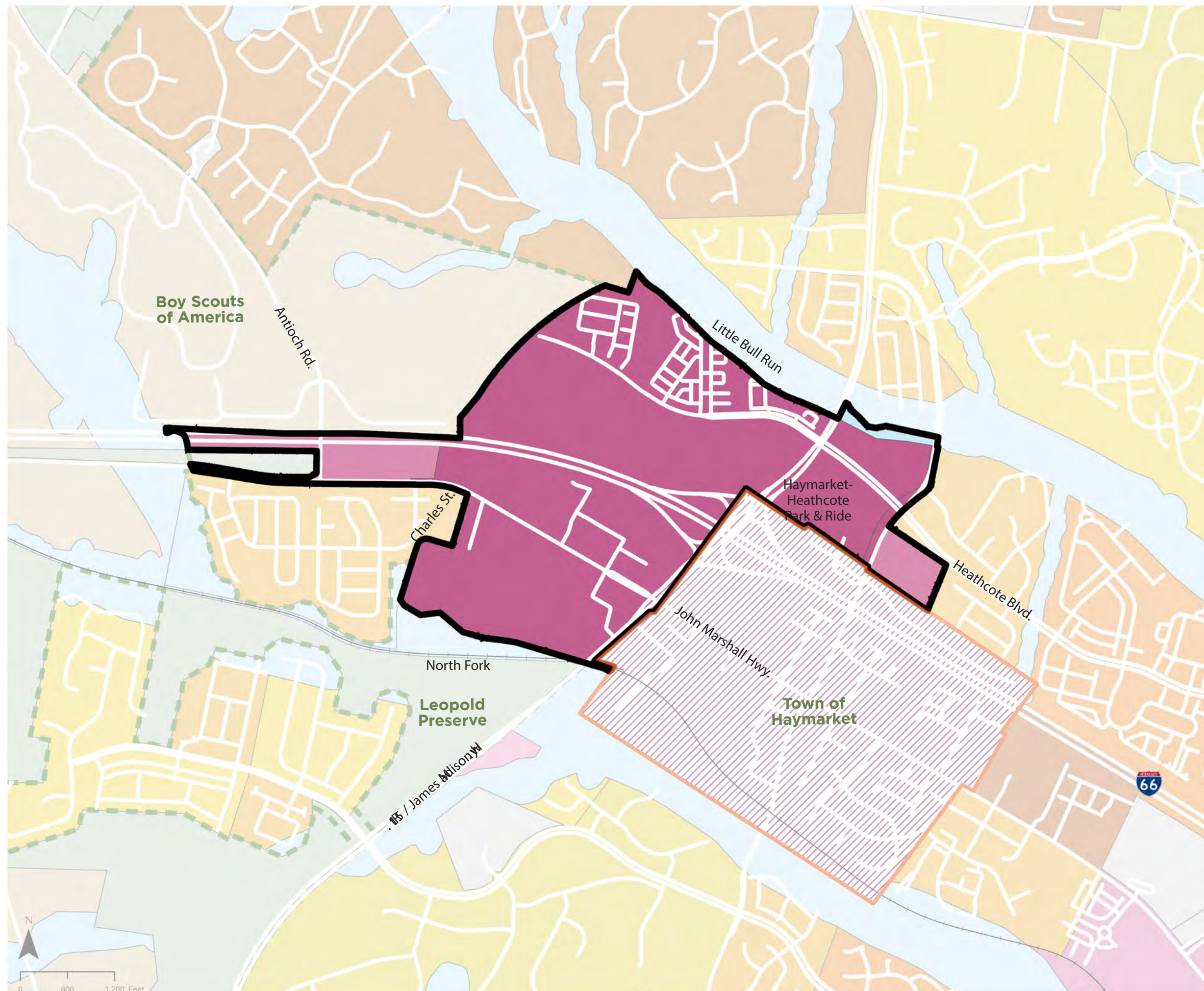


Planned Districts

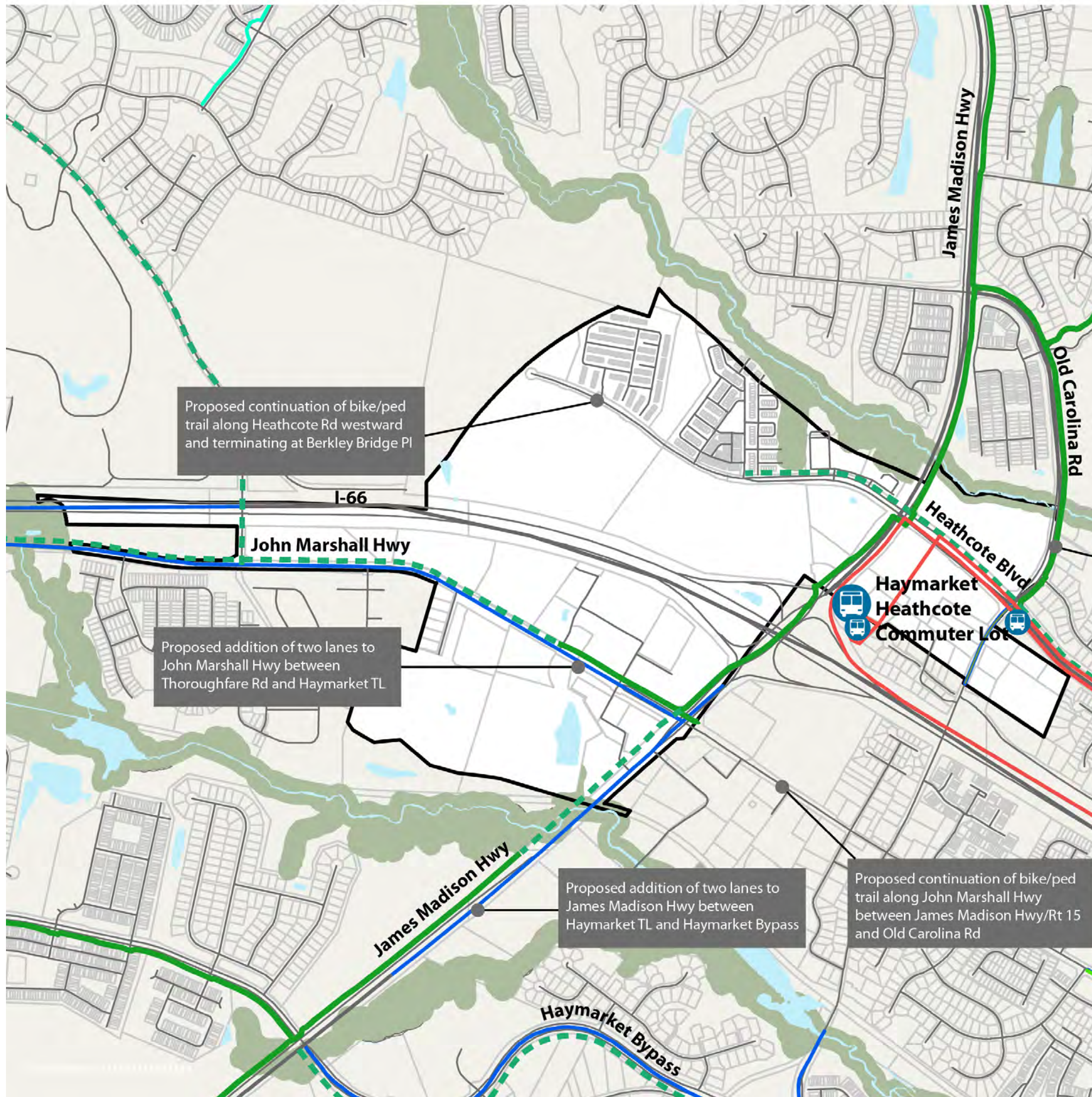
LONG-RANGE LAND USE

Regional Employment Center (REC)- encourages intensive regional employment uses. Primary uses in the REC may include mid-rise and/or high-rise office, research and development facilities, lodging, and mixed-use projects. Residential uses are secondary and may represent no greater than 25 percent of the total REC gross floor area @16-30 dwelling units per gross acre

Community Employment Center (CEC)- areas of low- to mid-rise offices, research and development, lodging, and mixed-use projects. Residential uses shall be considered secondary uses and shall represent no greater than 25 percent of the total CEC gross floor area of the project. Drive- in/drive-through uses are discouraged. Single-family attached or multifamily housing including elderly housing is permitted, at a density of 6-12 units per gross acre, less the ER designated portion of a property. A minimum office building height of 3-5 stories is preferred.



TRANSPORTATION



Legend

- Haymarket Boundary
- Bus Stop
- Commuter Lot
- 622 Line
- Existing Trail
- Proposed Trail
- Road
- Road with Proposed Improvements
- Hydrological Features
- Resource Protection Areas
- Parcel Line

Miles 0 0.1 0.2



Market Observations

Prince William County, VA

Route 15/I-66
Activity Center
Market Observations

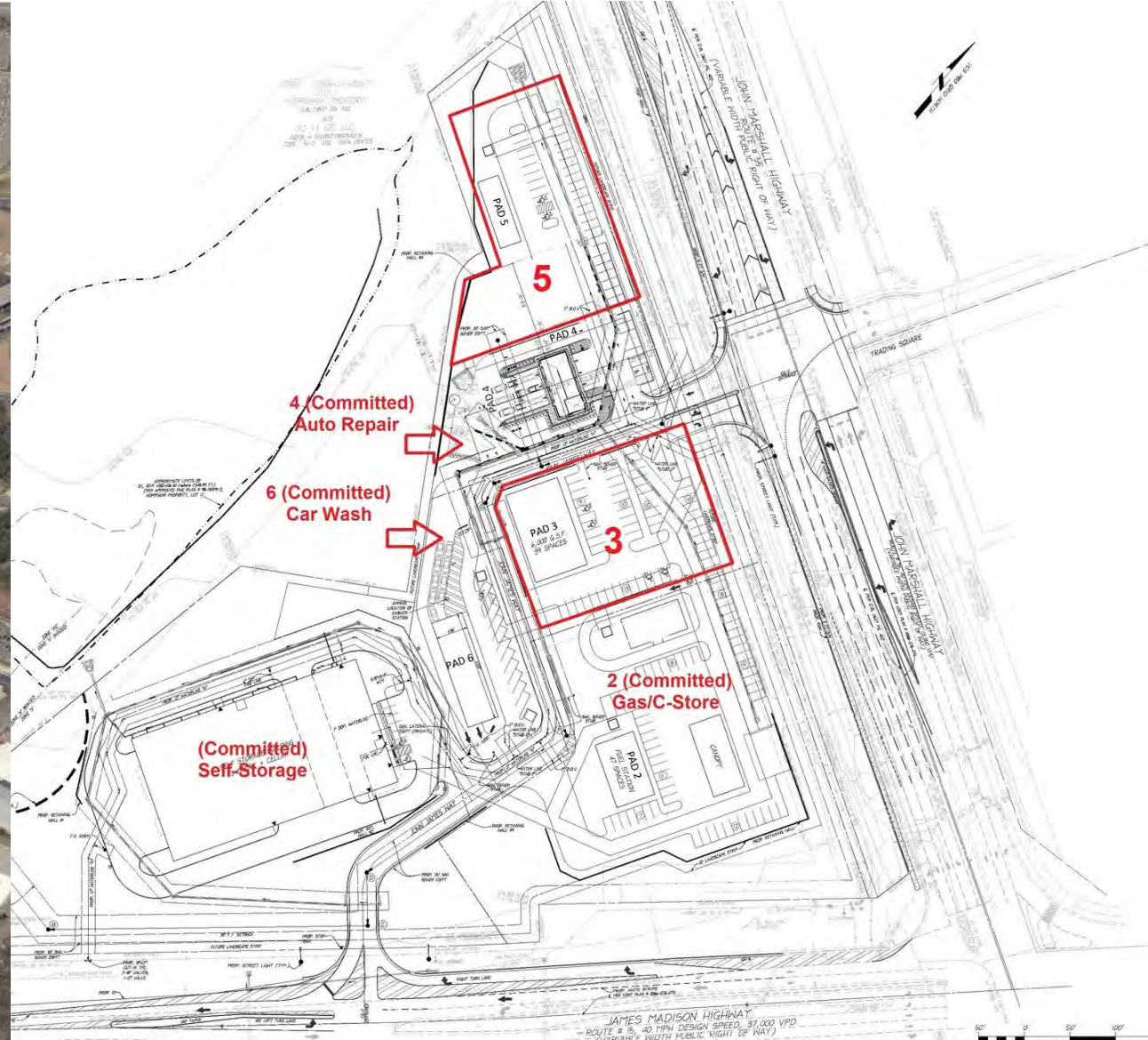
Land Use Observations

- Route 15/I-66 activity center offers several excellent job creation sites for development
- Haymarket Junction approved for development of auto-oriented uses at premium corner site at Route 15/55
- Heathcote Medical Center will drive future demand for medical office around their facility and perhaps across Route 15
- Higher density apartment living could occur at this location, but other supporting retail, services, restaurants and entertainment are currently in short supply
- Additional retail and office would be anticipated along Route 55 west of Route 15
- Additional data centers are anticipated near Amazon's current data center

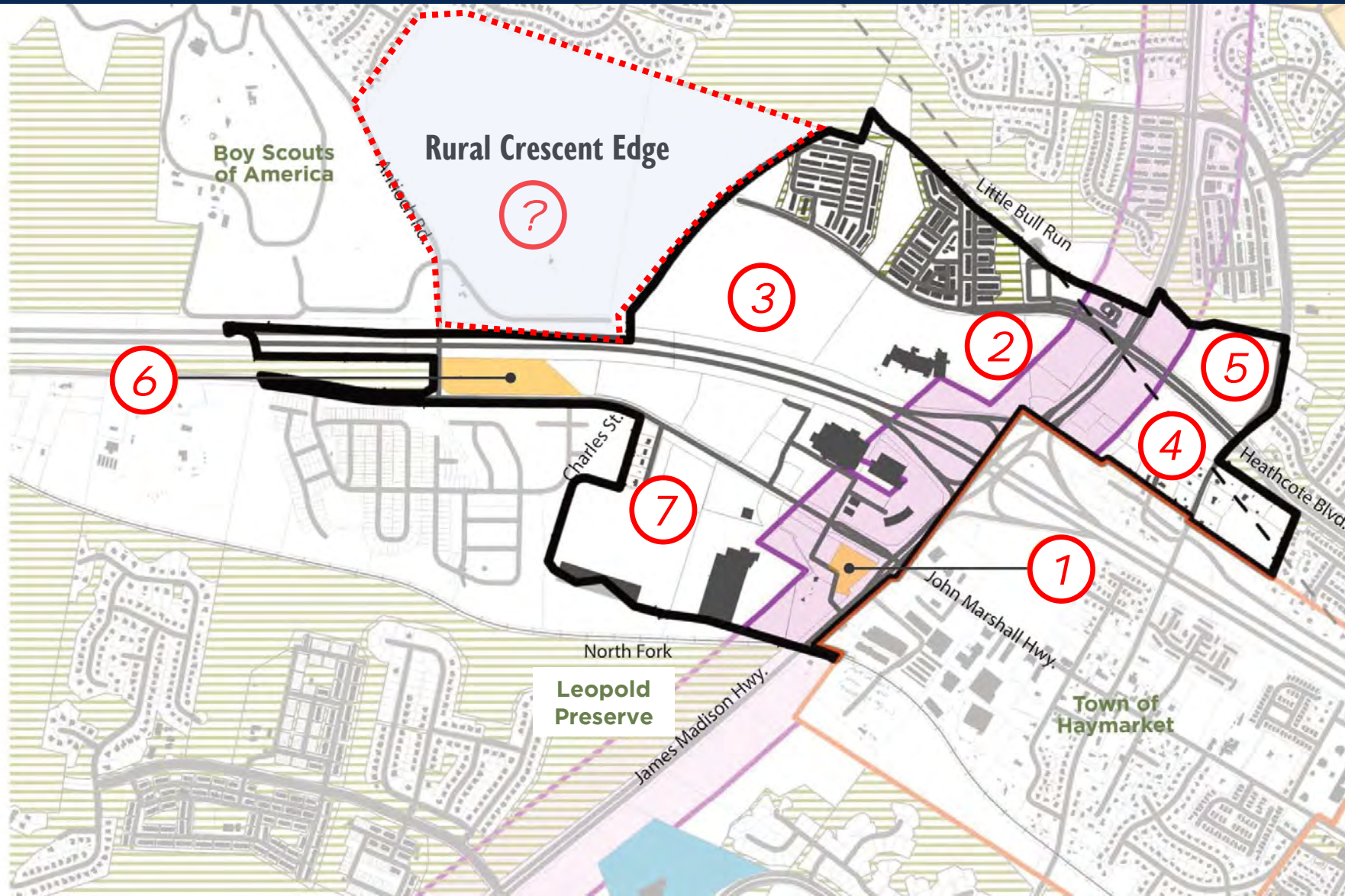
Route 15/I-66 Business Overview



Haymarket Junction

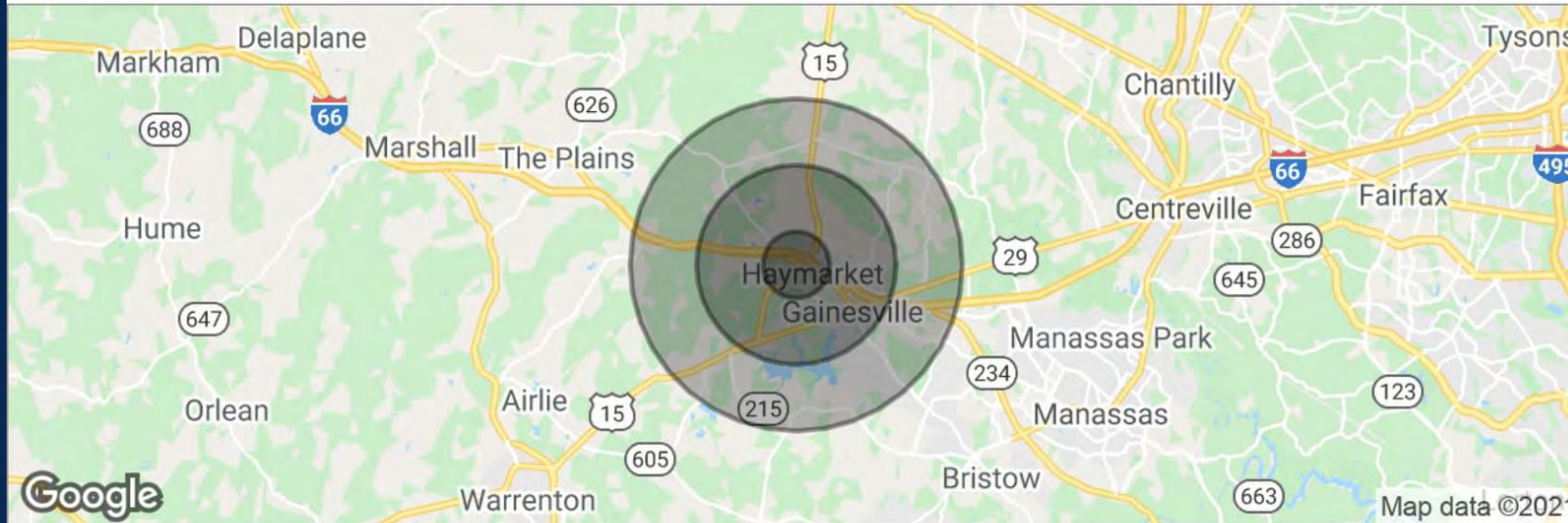


Top Development Sites



- Several top development sites for retail, office, medical office, Service and Higher Density Residential
- Heathcote Health Center owns sites 2 and 3 and likely to build medical office in the future
- Top location for job creation
- Edge of rural crescent is prime housing location
- Additional data center development is anticipated at Site 7

Retail Market Metrics



POPULATION	1 MILE	3 MILES	5 MILES
Total population	4,182	45,034	69,264
Median age	33.2	37.6	37.4
Median age (male)	33.7	36.1	37.5
Median age (Female)	31.6	34.4	36.7
HOUSEHOLDS & INCOME	1 MILE	3 MILES	5 MILES
Total households	1,331	15,108	22,781
# of persons per HH	3.2	3.00	3.00
Average HH income	\$132,069	\$137,220	\$137,138
Average house value	\$432,172	\$496,222	\$481,824

* Demographic data derived from 2019 CoStar estimates.

Retail Market Observations

- Estimated 40,000 ADT on Route 15, south of I-66. Approximately 63,000 ADT on I-66
- Activity center driven by big box retailers west of Route 15 and small locally owned retailers, restaurants east of Route 15 in downtown Haymarket
- Limited population west of this location due to development constraints related to the Rural Crescent. This will limit significant future retail development
- Household incomes are very high
- New Home Depot will open soon and additional small-scale retail will be attracted to shoppers drawn to Wal-Mart, Kohl's and Home Depot

Other Market Observations

HOTEL/RESTUARANT:

- Not likely a hotel location as the number of businesses is limited and other more popular hotel clusters are just a few miles east
- A restaurant cluster exists at Haymarket Village Center and east along Washington Street

OFFICE

- Small office presence today but will grow in the future, driven by medical office around the Heathcote Medical Center

INDUSTRIAL/FLEX

- No presence or need at this location

RESIDENTIAL

- Mostly single-family and townhome development on Heathcote Drive. Area is better suited for lower density development but could support apartment living

ISSUES & OPPORTUNITIES

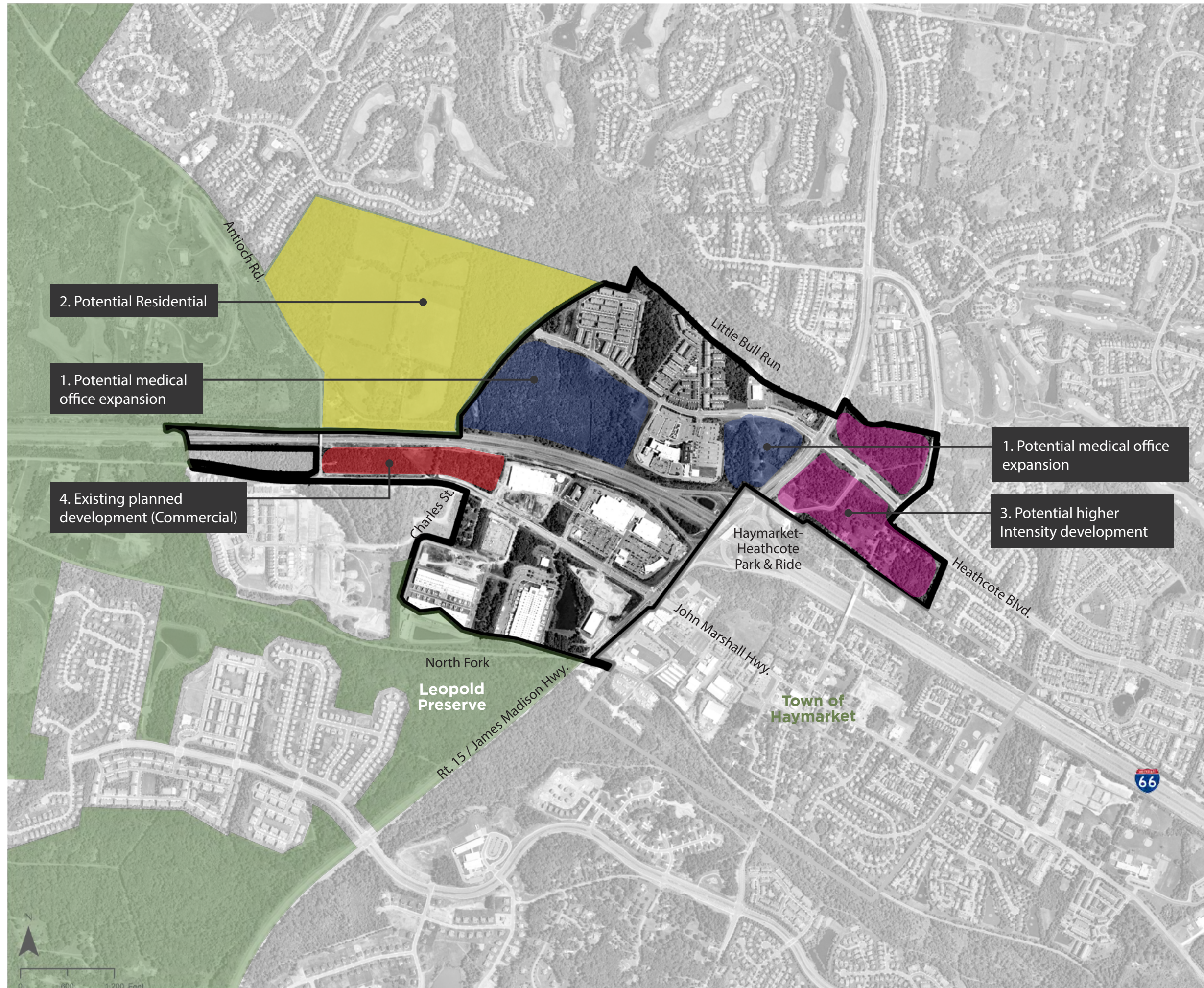
ISSUES

1. Lack of diverse housing options near the commercial areas (particularly apartments)
2. Sprawling, low-intensity commercial development with expansive parking
3. Major thoroughfares create visual barriers north-south, east-west
4. Most of study area include planned development areas
5. Plenty of planned development areas but absence of appropriate/safe pedestrian and bicycling environment internally.
6. Limited pedestrian/bicycle connections to the Town of Haymarket (from north/south and from Rte 15)
7. Lack of community identity despite branded planned development areas

OPPORTUNITIES

8. Top location for job creation (along Heathcote Blvd.)
9. Edge of rural crescent is a prime housing location
10. Explore best practices that define how to transition between "Rural Crescent" character and activity centers
11. Maximize mixed-use development opportunities near the Heathcote Medical Center. Explore opportunities for additional medical-oriented employment uses.
12. Establish an area identity
13. Recent corridor improvements along Route 15 include pedestrian infrastructure and shared use trail across I-66.
14. Connection of pedestrian/bicycle facilities to the Town of Haymarket (from Old Carolina Road and from Rte 15)
15. Proposed County trail connections along Rte 15 to the south and Rte 55 to the west expand ped/bike facilities

DRAFT LAND USE FRAMEWORK



- 1** The hospital will be a catalyst for future long-term employment growth. Ensure appropriate bicycle and pedestrian connections to the center throughout future surrounding office development.
- 2** Vacant land west of the study area is suitable for residential development
- 3** Potential mixed use development supporting commercial, office and residential uses. Maximize access to the Haymarket-Heathcote Park and Ride. Topographical challenges at these site locations.
- 4** Planned commercial areas can support additional retail uses.

Existing commercial centers and light industrial areas are currently performing well and are less likely to redevelop in the short term.