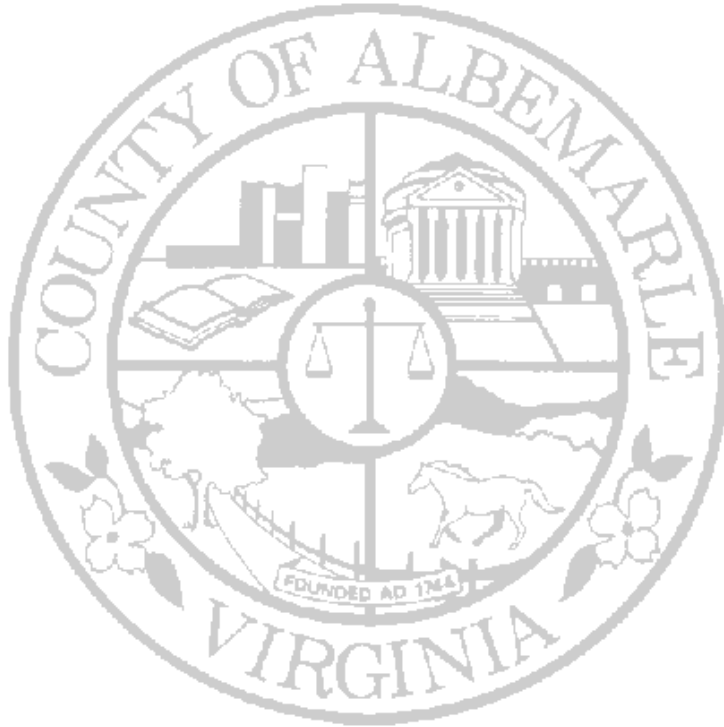


**ECONOMIC DEVELOPMENT
POLICY
ADOPTED MARCH 1, 1995
Updated 2008**



**COUNTY OF ALBEMARLE
COMPREHENSIVE PLAN
1996-2016**

**UPDATE: THIS DRAFT OF THE AMENDMENT INCLUDES THE TEXT CHANGES
INCLUDED IN THE PLANNING COMMISSION'S RECOMMENDATION FOR APPROVAL
(APPROVED 10/21/2008)**

The purpose of this economic development policy is, first and foremost, to provide the local citizenry an improved standard of living and enhanced quality of life. Economic growth and vitality are required to sustain and enhance the human economic, cultural, and natural characteristics of our community. By creating and sustaining a high quality, diversified economic environment, citizens will enjoy improved job opportunities, competitive wages, work force development opportunities and a diversified tax base. With well defined development areas, we will seek to designate opportunity sites to address future growth needs in a manner that will add to the strength of our community. We will engage with our resident and new enterprises seeking to expand their businesses. We will work to find appropriate development areas sites to accommodate this positive growth. We will work with resident and new agricultural enterprises to, in an environmentally sustainable manner, maximize their productivity and tourism opportunities as a part of our overall strategy to preserve the rich agrarian tradition and texture of our rural areas. We recognize our position, along with the City of Charlottesville, as the center of the regional economy. We recognize the economic objectives of other localities in the region, while renewing our commitment to our own economic development within the framework of our growth management objectives

Note: "Business" and "industry" are intended to be inclusive and interchangeable terms, meaning the commercial production and sale of goods or services.

GOALS, OBJECTIVES, AND STRATEGIES:

GOAL: Maintain a strong and sustainable economy: 1) benefiting County citizens and existing businesses and providing diversified economic opportunities; 2) supportive of the County's Growth Management Policy and consistent with the other Comprehensive Plan goals; and, 3) taking into consideration the greater Charlottesville Metropolitan region.

OBJECTIVE I: Base economic development policy on planning efforts which support and enhance the strengths of the County.

STRATEGIES:

1. Protect through diligent growth management efforts the County's distinctive natural and man-made qualities to maintain its attractiveness as a place to live and work.
2. Maintain the relationship of high quality schools and public services and an outstanding level of natural and cultural amenities to positive economic development, and maintain these attributes.
3. Increase the promotion of tourism focused on the rural, agrarian, and historical resources of the County, and which does not threaten or compromise those resources and to be consistent with the goals of the Comprehensive Plan.
4. Increase the promotion of local agricultural industry consistent with the goals, objectives and implementation strategies of the Comprehensive Plan, more specifically by
 - Increasing support to local agricultural infrastructure such local food networks and programs. (The agricultural infrastructure provides markets and supplies to farmers and significant economic activity to Albemarle

Deleted: Albemarle County has a strong economy. We have a growing population and labor force and have experienced low unemployment rates. The labor force is skilled and well-educated. Good schools, good planning, and our quality of life are important factors in the County's current economic position. Median incomes are higher than at the State and regional levels. A consistently strong employer is present in the University of Virginia, which, as a major university and medical center, offers great potential for associated research and development industry. Other major employers and sectors continue to provide employment stability and diversity. The renowned natural environment, Blue Ridge Mountain location, and historic resources of the area provide a growing tourist trade as well as an attractive place to do business. The rural and agrarian heritage contributes to this character, and also offers opportunity for agricultural and forestry industries. These are the strengths of Albemarle County which this economic development policy recognizes, and will seek to maintain.¶

¶ We are like other university communities in that we have an above-average labor force participation rate and above-average number of part-time workers (both students and adults who prefer part-time work). As a university community, we have a somewhat captive labor force as well as people who live here for quality of life reasons, knowing that wages would be higher in the more urban parts of the state. We are a growing community with rising property values, and a large share of our housing stock is new and priced accordingly. The high demand for both new and used housing and the desirability of the community produce well above average housing costs relative to wages paid by many employers. As we fine tune our ... [1]

Deleted: The purpose of this economic development policy is, first and foremost, to provide the local citizenry an improved standard of living, improved job opportunities and competitive wages, and work force development opportunities, rather than to seek to stimulate further population growth. We do not see ... [2]

Deleted: regional (including the City of Charlottesville, and Greene, Louisa, Fluvanna, and Nelson Counties) economic development efforts.

Deleted: Continue to recognize

Deleted: Encourage

Deleted: Encourage agriculture and forestry by implementing when appropriate the recommendations of the Agricultural and Forestal Industries Support Committee

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County as a whole.)

- Establish a proactive rural-support program that provides assistance to the local agricultural community, and that includes an on-going dialogue with farm-industry stakeholders.
- Support recruiting of new farmers by connecting those farmers with technical resources such as the Farm Bureau, PVCC and VA Department of Agriculture and Consumer Services and incorporating outreach and education in public school programs.

5. Recognize that the University of Virginia can provide important resources for business and industry and work with the University and its associated entities to take advantage of opportunities to benefit from this resource in innovative ways.

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6. Maintain a contact point for information about the County, including the Business Development Facilitator who serves as the County’s principal liaison with the business community for the purpose of encouraging development and businesses consistent with the County’s Comprehensive Plan.

Deleted: Compile data on County plans, zoning, sites, and policies, and make these available on request.

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7. Increase planning for the special needs, and utilize the talents, of the growing retired population attracted to this area, including “encore-career” seekers, a term used to describe work in the second half of life that combines continued income, greater meaning and social impact.

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8. Increase support to initiatives that support employment of the local labor force, rather than heavy reliance on relocated workers.

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9. Encourage all commercial businesses to adopt environmentally sustainable measures. Discourage business and industry which is not environmentally sustainable or friendly (such as high water users, polluters).

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10. Increase diversity in business and industry which will accommodate a variety of skill/educational levels and provide for a diversified tax base.

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11. Maintain data on County plans, zoning, sites, and policies, and make these available on request. Monitor and report to the Planning Commission and Board of Supervisors about the volume of economic development activity and how that activity is fitting with the Goals, Objectives and Strategies of the Comprehensive Plan.

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OBJECTIVE II: Plan for land and infrastructure to accommodate future business and industrial growth.

STRATEGIES:

1. Assess the quality of areas designated for business and industry through analysis of the site size variety, topography, location, and availability of infrastructure in such areas, and compile an inventory of actual, useable land.
2. Designate areas for office, commercial and industrial development that meet the development standards of the Comprehensive Plan and will provide sufficient land to meet

community needs through the next Comprehensive Plan revision. Provide enough land to allow flexibility and choice without inviting sprawl or detracting from infill opportunities in areas designated in the Plan.

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3. Utilize the rezoning process and associated proffer allowances to address needs brought about by new development and to provide the community with assurances about future development activities.

4. Encourage infill development of business and industrial uses in areas appropriately designated in the Land Use Plan, including consideration of proactively rezoning land as needs are identified through Master Plans and other efforts. Initiate zoning text amendments that further enable business and industrial uses of the appropriate zoning districts.

5. Maintain review of current infrastructure (water, sewer, roads, and community facilities) programs to determine their capacity to support business and industrial development of designated areas. Identify infrastructure improvements that better enable business and industrial development.

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6. Continue to work with property owners in designated Development Areas to identify infrastructure needs, and promote good planning for development of such areas consistent with County growth management strategies.

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OBJECTIVE III: Recognize the County's place in the regional economy.

STRATEGIES:

1. Maintain cooperation with the City of Charlottesville, TJPDC, Thomas Jefferson Partnership for Economic Development (TJPED), other jurisdictions in the region, the University of Virginia, and Piedmont Virginia Community College for:

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- Development of a coordinated economic data base, such as the State-sanctioned software, "Business First";

- Continuing discussion among the TJPDC jurisdictions about working and shopping patterns, wage levels, job stability, work force development needs, housing affordability, public services, tax burdens, and other topics which relate to the purposes of local and regional economic development policy;

- Distribution of information about development opportunities in the Thomas Jefferson Planning District Commission (TJPDC) to those who request it;

- Regional work force development;

- Addressing linkages between housing and wages;

- Evaluating local, regional, statewide, national, and worldwide economic trends to determine the current and future economic stability of, and growth opportunities for, different types of business and industry.

- Initiatives such as the high school technology tour.

2. Support mutual consultation on regional development projects along shared borders, and/or on projects of significance to more than one locality, possibly through a "Memorandum of Understanding."

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¶
3. Recognize and seek to cooperate with the City of Charlottesville's economic development objectives, and the objectives of the other counties in the Thomas Jefferson Planning District, consistent with County goals, objectives, and strategies.

3. Measure our accomplishments in economic development against the strategic questions

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posed in the Community Vision Statement regarding economic opportunity.

OBJECTIVE IV: Consider fiscal impact as one indicator of positive economic development, along with environmental impact and standard of living impact.

STRATEGIES:

- 1. Maintain evaluation of the fiscal impacts of new business/industrial development.
- 2. Recognize that County residents place importance on job opportunities and economic growth, but not at the expense of the protection and preservation of water quality and quantity, natural resources, farmland, historic areas, and open space.
- 3. Recognize that the purpose of this economic development policy is to provide the local citizenry an improved standard of living, improved job and wage opportunities, and work force development opportunities, rather than to seek to stimulate further population growth.
- 4. Recognize, identify and quantify new cost burdens (for business and citizens) imposed by any proposed ordinance or policy change on business prior to taking action on said policy or ordinance.

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OBJECTIVE V: Increase local business development opportunities.

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STRATEGIES:

- 1. Maintain support to existing businesses and industries through an open door policy of communication, and exchange of information and concerns.
- 2. Increase support to and coordination with existing entities that assist new small, locally-owned, and minority businesses and micro-enterprises in their start-up and early operation efforts.
- 3. Where and when possible examine options to help create a local business incubator resource to encourage both work force development and local entrepreneurship. Business incubators are programs designed to accelerate the successful development of entrepreneurial companies through an array of business support resources and services, developed and orchestrated by incubator management and offered both in the incubator and through its network of contacts.

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OBJECTIVE VI: Increase work force development opportunities.

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STRATEGIES:

- 1. Recognize that the most fundamentally sound work force is one that has basic education and good work habits.
 - Increase support for initiatives that foster career-planning, decision-making and workplace readiness skills for the K-12 population, such as, and as measured by the number of participants in career-education activities.
 - Increase support for testing facilities to support residents seeking apprenticeship.

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industry licensure or certifications for high-demand and career-ladder jobs. Target populations would include disadvantaged, lower-income and “encore-career” seekers served by the VA Employment Commission.

- Promote employee certification and licensure to the business community.

2. Encourage and support continuing educational and training programs to prepare the local work force for the skill demands of current and future employers, including appropriate work habits and life skills.

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- Increase support for (to purchase books, etc.) for Albemarle County residents to attend pre-employment training at career centers to include topics such as time-management, stress-management and customer service.
- Increase support for continuing education and training programs, ideally targeting incumbent-worker, career-ladder training.

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3. Increase the use of information gathering strategies such as,

- A regional, baseline workforce study to define and benchmark underemployment and “not-in-the-laborforce” needs as well as employer needs
- Use entrepreneur software, such as “Business First” to help identify workforce training needs

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▼ Monitor performance of the Strategic Plan and the Comprehensive Plan (education, housing, day care, transportation, etc.) to address barriers experienced by the local work force, particularly those with greatest needs.

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Deleted: Develop related goals and objectives

Priority Action Measures:

To address issues identified in the 2007 updated data, the Policy’s short-term priorities include the following strategies:

- Objective I. Strategy 4. Increasing the promotion of local agricultural industry consistent with the goals, objectives and implementation strategies of the Master Plan, such as increasing support to the “Buy Fresh, Buy Local” campaign, and establishing a proactive rural-support program and continuing an on-going dialogue with farm-industry stakeholders.
- Objective II. Strategy 4. Encourage infill development of business and industrial uses in areas appropriately designated in the Land Use Plan, including consideration of proactively rezoning land as needs are identified through Master Plans and other efforts. Initiate zoning text amendments that further enable business and industrial uses of the appropriate zoning districts.
- Objective VI. Strategy 3. Increase the use of information gathering strategies such as:
 - A regional, baseline workforce study to define and benchmark the needs of “underemployed” and those not in the labor force (as defined by the VA Employment Commission) as well as employer needs.
 - Use entrepreneur software, such as “Business First” to identify workforce training needs and promote workforce training opportunities.

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ANALYSIS AND FINDINGS

WHAT WE KNOW:

Economic Growth

1. Albemarle County has experienced steady growth and will continue to grow as people continue to move to the County.

Updated Staff Analysis: Albemarle County's population grew 2.0% annually from 1980 to 1990, 2.1% from 1990 to 2000, and slowed to 1.3% from 2000 to 2006. Over the entire period, 1990 to 2006, annual population growth averaged 1.8%. VEC forecasts Albemarle County's population to grow at 1.1% annually for the years 2006 to 2020. Net in-migration accounted for 65% of the annual growth from 2000 to 2005, with 2005 being at 52%. Migration into Albemarle County has been, and will likely continue to be, the primary component of growth. See "Attachment A – Population Growth."

Deleted: Albemarle County's population grew at 2.0% annual rate from 1980 to 1990. It is forecast to grow at a 1.5% annual rate during the 1990's and a slightly lesser 1.3% annual rate after the turn of the century. Migration into Albemarle County has been and should continue to be the primary component of growth. During the 1980's, 63% of that growth was net in-migration of people.

2. At times, the County's resident labor force has grown at a rate exceeding County population growth; yet the number of those unemployed has not increased and, in fact, the County's unemployment rate has consistently been the lowest in the area and has stayed well below state and national rates.

Updated Staff Analysis: Previous time-series analysis from 1982 to 1992 showed the resident labor force growing by 35%; in contrast, the 10-year period from 1990 to 2000, the County's resident labor force grew by 19.1% (as compared to a population growth of 23.5%) and the average annual unemployment rate during the time period 1990 through 2000 was 2.3% (as compared to 4.0% at the state level and 5.5% nationally). The average annual unemployment rate in the time period 2000-2006 was 2.4%. See Attachment C.

Deleted: Over the 10 year period from 1982 to 1992, the County's resident labor force grew by 35% (as compared to a population growth of a little over 20%) and the unemployment rate averaged 3.6% annually (as compared to 5.3% at the state level and 7.1% nationally).¶

3. County residents place importance on job opportunities and economic growth, but not at the expense of the protection and preservation of water quality, natural resources, farmland, historic areas and open space. In Spring, 1994 Albemarle County Planning Needs Survey rating of long-term community planning goals, bringing more jobs to the area had an average rating of 2.40 (1 being not so important, 2 being somewhat important and 3 being very important). Protecting water quality scored an average of 2.86, preserving natural resources and open space an average of 2.73, preserving farmland an average of 2.68 and preserving historic buildings an average of 2.53.

Updated Staff Analysis: [In the Albemarle County 2006 Citizen's Survey rating of long-term planning goals, promoting economic development had an average rating of 2.55 \(1 being not so important, 2 being somewhat important and 3 being very important\). Protecting water quality scored an average of 2.92, protecting natural resources and the environment an average of 2.79, and preserving historic buildings and places 2.48. See Attachment Y – Importance of Long-term Community Planning Goals.](#)

Updated Staff Analysis: In the Albemarle County 2006 Citizen’s Survey rating of long-term planning goals, promoting economic development had an average rating of 2.55 (1 being not so important, 2 being somewhat important and 3 being very important). Protecting water quality scored an average of 2.92, protecting natural resources and the environment an average of 2.79, and preserving historic buildings and places 2.48. See Attachment Y – Importance of Long-term Community Planning Goals.

Regional Context

4. **While the County has the largest resident labor force in the area, the City of Charlottesville retains a strong position as an employment center with its employers attracting a significant number of County residents to work each day. Together the City and County are the center of a regional economy in which the majority of the region's workers are employed in Charlottesville and Albemarle County.**

Updated Staff Analysis: Staff analysis compares Bureau of Labor Statistics data measuring resident labor force (the total number of employed Albemarle County residents) with numbers from the VA Employment Commission’s Quarterly Census of Employment & Wages (QCEW), which show the total number of jobs in Albemarle County. Continuing a long-term trend, there are a greater number of employed County residents than total jobs in the County, 48,572 versus 47,817 in 2006. This gap, however, has narrowed since 1993. In that year, the difference equaled 5,774 whereas, by 2006 the gap diminished to 755. Also of interest is that, according to QCEW data, the County surpassed the City in 1999 to provide the most jobs for the region. See Attachments D and E.

The 2000 Census indicates the most recent, reliable data available about commuting patterns within both the City and the County. According to the 2000 US Census 55% of County workers commuted within Albemarle County, up from 49% in 1990. With another 35% commuting from Albemarle County to Charlottesville, these two areas together employed 90% of Albemarle County residents in 2000. See Attachment C.

Deleted: There is a greater number of employed County residents than total jobs in the County. As a result, according to the 1990 U. S Census 49% of County workers are employed in Albemarle County, while 43% commute to Charlottesville where there are more jobs than workers. Charlottesville remains the area's largest employment location with about 36,000 jobs (April, 1993) as compared to about 29,000 in the County. Together, the City and County comprise the region's employment center, employing 88% of the Planning District 10 work force.

5. **By any of several measures of economic activity, Albemarle County is pacing the Charlottesville region’s economic growth.**

Updated Staff Analysis: As measured by data from several different categories, Albemarle County continues to pace the Charlottesville region’s economic growth.

Tourism. For the last available three years, travel generated \$172,679,351 in 2003; \$189,233,741 in 2004; \$212,306,588 in 2005. According to Smith Travel Research – a proven, reliable source of hotel industry information - compared with the state and the US, Albemarle County-Charlottesville area typically has had a higher average occupancy rate, especially since 1993. See Attachment R - Albemarle County Travel Expenditures

Taxable Sales. The County's per capita taxable sales have increased by approximately 50% between 1996 and 2006, an increase that is better than that of the peer-county average (42%). In 2006, the largest taxable sales sectors, by North American Industrial Code (NAIC) by dealer, were: 1) General Merchandise stores, 2) Building Materials and Garden Supplies, and 3) Food and Beverage stores generating a 2006 combined tax base of \$536 million. The next closest tax sector by dealer was “Accommodation.” There were 211 “Rental and Leasing Service” companies, the highest number of dealers generating taxable sales. See Attachment S – Sales/Sales Tax.

Deleted: Economic trends are showing steady growth in economic activity in Albemarle County. Reflecting its history, location and presence of the University, travel expenditures increased 13% annually from the late 1980's into the early 1990's. Taxable sales in the County grew at an average annual rate of 17.8% in the 1980's, continuing to grow through the recession of the early 1990's to, for the first time, exceed taxable sales in the City of Charlottesville in 1992 by \$14 million. Retail sales also grew in this period at more than twice the rate of the state, with per capita retail sales increasing from \$4,867 per person in 1985 to \$6,992 per person in 1992 (as compared to state figures of \$5,471 per person in 1985 and \$6,710 per person in 1992). An analysis of retail trade indicates that the County has become a regional market center that is a net importer of retail trade dollars. Deposits in commercial banks have also increased steadily (13% annually from 1983 to 1992), out pacing the state average for that period. Building activity, subject to inflation and the ups and downs of the economy, showed steady growth throughout the 1980's, peaking in 1989, and, despite the recession of the early 1990's, has continued at a fairly steady dollar level of activity in all sectors - residential, non-residential and commercial/institutional as well as farm buildings – in 1992 and 1993.

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BPOL Tax. Business, professional, and occupational license (BPOL) tax revenue serves as one proxy for the volume of business activity taking place in a jurisdiction. In the case of Albemarle this tax revenue increased steadily from 1996 through 2001 and in 2006 BPOL increased 17.7% over 2005 BPOL nominal revenues. BPOL per capita provides a measure of business intensity. The higher the value of BPOL per resident, the higher the level of business activity each resident supports. In real terms, adjusted for inflation, the County's Per-Capita BPOL tax revenue increased between 1997 and 2001 and dropped in 2002, 2003, and 2005. From 1996 to 2006, the average annual growth rate for BPOL per capita is 5.3%. See Attachment S-2-BPOL.

Savings. Deposits in commercial banks and savings institutions increased steadily at 3.0% annually from 1994 to 2000. From 2001 to 2005, deposits jumped to average growth rate of 21.7%. Over the long-term from 1994 to 2005, deposits grew an average of 9.9% per year. See Attachment T – Deposits in Commercial Banks.

Building Permits. The number of new residential building permits has varied over time. Between 1990 and 2006, the number of residential building permits has averaged 669 per year and the median number of permits is 666. The number of new commercial permits has averaged 62 per year. See Attachment U for additional comparisons in building value and permits over time.

6. The County population is getting older, a result of both the national trend of aging baby-boomers and the attractiveness of the area to those reaching retirement age.

The middle and older age populations aged 40 and over, which constitute empty-nesters and those retiring, grew from 29% of the County's population in 1980 to 35% of the population in 1990, totaling a little less than 34,000 people. By 2010, this group is forecast to total 45% of the population, or a little over 40,000 people. By contrast, the 20-39 age-group – constituting late college/post graduate students, young professionals and families in their prime child-bearing years – and a group that more than doubled in number from 1970 to 1990, is forecast to remain almost stable over the 1990 to 2010 period. This shift to middle and older populations represents: population growth without job growth - and without the expense of educating children; a unique housing market; and a market with a certain amount of discretionary income to spend.

Updated Staff Analysis: Albemarle County's share of households headed by persons under 25 years of age has followed the regional pattern with the share of households headed by persons between the ages of 25 to 44 dropping significantly over the last 15 years.

From 1990 to 2005 the share of households headed by 45 to 64 year olds has increased along with the households over 70 years of age. Albemarle County's and the City of Charlottesville's increasing share of households aged 45 and over is both a national phenomenon (the baby-boomers aging) and a function of in-migration. See Attachment B.

The result of these demographic changes has been an increase in the County's median head of household age, over time. In 1990, the County's median head of household age was 1.4 years below the State average. By 2000 the County's median head of household age surpassed Virginia's.

7. The County population is well educated with many residents possessing bachelor's or graduate degrees, also a reflection of the presence of the University and higher technology/professional service employers.

Updated Staff Analysis: 39% of County residents had obtained at least a bachelor's degree in 1990.

Deleted: 39% of County residents had obtained at least a bachelor's degree in 1990. Another 42% had graduated from high school, 23% having attended some college or possessing an associate's degree.

Another 42% had graduated from high school, 23% having attended some college or possessing an associate's degree. By the year 2000, 48% of County residents aged 25 and older had obtained at least a bachelor's degree. Another 18% had graduated from high school, 22% had attended some college or possessed an associate's degree. As of the 2005 "American Community Survey" Census, over 54% of County residents aged 25 and older had obtained at least a bachelor's degree or higher; all the other segments had declined from 2000 levels. The ACS margin of error, with a 90% confidence interval, could put this number anywhere from 45.2% to 63.4%. It would be difficult to conclude that significantly more residents had advanced degrees in 2005 over 2000 levels. See Attachment I for more information about educational attainment.

Economic Health

8. The University of Virginia remains the dominant employer in terms of numbers of employees, but is providing and will likely continue to directly provide a decreasing share of the County's and the area's overall employment.

Updated Staff Analysis: The University of Virginia remains a dominant employer in terms of the number of employees. The University employs almost 12,000 employees in its academic and medical centers combined, representing, on average, 25% of the County's total employment. The University collects only 8% of its budget from the state, and for this reason is engaged in a \$3 billion private endowment campaign over the next five years, until 2011, to fund program development and expansion. The growth in number of UVA employees (academic and medical centers) is growing faster than the student population (undergraduate, graduate, medical schools). From 2001 to 2006, UVA employment grew, on average, 3.2 percent while student growth was 1.2 percent for the same period. UVA student growth is expected to increase by 184 students (net change) per year through 2011. See Attachment C.

Deleted: The University employs some 12,000 persons in its academic and medical centers combined, representing 18% of the City/County total employment (this compared to 20% in 1985). While the University expects to add some 2,000 students in the next 10 years, it expects to do so essentially without increase in its total employment

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9. The types of jobs provided by the County's employers, following national trends, are becoming more trade and services oriented.

Updated Staff Analysis: While government continues to provide the most jobs (34% in 2005, and 32% in 2006), a major shift has occurred with manufacturing job loss and significant increases in retail trade employment. Since 1990 manufacturing jobs have dropped from 19% of the total job base to 6%, experiencing an average annual decline of 4.6% per year from 1990 to 2006. Over this same period, retail employment grew from 9 to 11.4% of the total employment base, bringing it up to the second largest employment sector, behind state government. See Attachment F – 1990, 2000 & 2006 Employment Trends.

Deleted: While government and manufacturing continue to provide the most jobs (28% and 20% respectively), the greatest growth in County employment sectors has been in services and wholesale/retail trade. This reflects national trends of contracting manufacturing employment while trades and services are experiencing growth. Yet, for both sectors the proportion of all County jobs (18.5% and 17% respectively) is still below statewide proportional averages. Since 1982, manufacturing employment has experienced virtually no change. In the Charlottesville Metro Statistical Area, manufacturing employment is forecast to decrease by 10% over the next 10 years, while services are forecast to grow by 36% and wholesale and retail trade by 24%. Within the services sector, social services, legal services and engineering and management services are forecast to have the greatest growth.

In terms of average annual growth over the period from 1990 to 2006, the fastest growing sectors are federal-government employment (16%, or 690 jobs), professional and technical services (11.4%, or 2,723 jobs), and health care (10.2%, or 4,133 jobs). Several other sectors also experienced strong growth: information at 6.6% (or 714 jobs), education, at 6.1% (or 346 jobs), and the arts and entertainment at 5.0% (or 1,172 jobs). Real estate experienced moderate growth at 6.1% from 1990 to 2000, but declined to an average growth rate of 1.1% per year from 2000 to 2006. See Attachment F – 1990, 2000 & 2006 Employment Trends.

A QCEW third-quarter, 2006 comparison with James City County, the City of Charlottesville and the state shows that Albemarle County is significantly more dependent on the government employment sector than the others: Albemarle County's base is 32% government employees. In the next largest

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segment, James City County, the City of Charlottesville and the State have a higher proportion of “Retail” and “Accommodation/Food Service.” James City County and the State have higher percentages of manufacturing than Albemarle County and the City of Charlottesville. The State has the highest proportion of “Professional and Technical Services,” at 9.6 % of the economic base and leads by a significant margin over the other jurisdictions, particularly Albemarle County. See Attachment F – Employment by Two-Digit North American Industrial Classification (NAIC) code.

10. The occupation of County workers, reflecting the presence of the University as well as other higher technology/professional service employers, is fairly concentrated in managerial and specialty occupations and technician, sales and support occupations.

Updated Staff Analysis: Per the 2000 Census, over 85% of the labor force occupations are managerial and professional, service, and sales and office – the highest in the region, besides the City. From VEC’s occupations forecast (2004-2014) for the Piedmont region VI, a comparison of the region to the State shows there is a slightly lower proportion of these groups statewide. Compared to the state averages, the Piedmont Region VI has more health care professionals (8.2% versus the state’s 6.0%), educators (7.8% versus the state’s 5.4%) and construction/extraction occupations (7.9% versus 6.4%) than the State. (See attachment H).

Deleted: Close to 70% of labor force occupations are executive, administrative, managerial and professional specialty (36%) or technicians, sales and administrative support (33%). Statewide, there is a lower concentration in these groups (61%). Only 8% of occupations are operators, fabricators and laborers. Statewide, there is a higher concentration in this group (14%). (See Attachment H)

11. While the number of employers in the County is increasing, the number employed by those employers has remained relatively stable.

Updated Staff Analysis: At 3.8% per year, the number of employers in the County has grown more quickly than average annual population growth (1.8%) and the average annual employment growth (2.4%) during the period 1990 to 2006. Excluding UVA employment, a slight majority of employees are employed by companies with 20 to 50 employees. This is also consistent with the State’s average employment, although Albemarle County has proportionately fewer larger-sized companies than the state. See Attachment J.

Deleted: The number of employers in the County has grown from 1,192 in 1987 to 1,584 in 1993. Employment in Albemarle County establishments was 29,045 in April, 1987 and 29,167 in April, 1993. Taking into account the physical relocation of UVA Hospital employees from the County to the City during this time period, this indicates that employment in other sectors actually increased. Major employers of over 150 employees (not including the University) accounted for 19% of the total County labor force in 1993. This compares with 22% of the total labor force in 1987. (See Attachment J)

12. While the County has relatively high incomes when compared to the region and the state, wages in many employment sectors are below the state average for those sectors.

Updated Staff Analysis: In 2004 Albemarle County median income was 110% of the state median income; median household income was 111% of the State’s. Average annual Albemarle County median income appears to be growing more slowly than that of the City of Charlottesville and the State. See Attachment K.
In 2005 for the following industries, Albemarle County wages were comparable or exceeded state wages: manufacturing, retail, information, health care, arts and entertainment, accommodations and food, and real estate. Several key industry sectors pay less than the state average: public administration, professional and technical services. See Attachment M for historic wage comparisons to the State.

Deleted: Both median family and median household income figures for Albemarle County residents have, over time consistently exceeded the Charlottesville region and state medians. In 1993, median family income was 115% of state median. Yet, except for the agriculture and government employment sectors, wages provided by the County’s employers are below state averages. In 1992, the manufacturing, trade and services sectors were respectively, 98%, 81 % and 70% of state average. A closer look at the service sector reveals that several service provider-type jobs — legal, membership and engineering/management — exceed state average, but that the remaining job types, many of which are service providers (ex: hotels/lodging, personal, business, health services, social services, household) are below state average, some substantially so.

13. While families and persons living in poverty in the County have consistently fallen, poverty still exists for a segment of the population.

Updated Staff Analysis: From 1970 to 2000, the number of families experiencing poverty fell from 1,150 to 879. In 2000 this represented 4 percent of families and slightly over 5,000 people. By 2006 the Census estimated poverty had increased to 5,975 people, with a margin of error of 1.9%.

Deleted: From 1970 to 1990, the number of families experiencing poverty fell from about 1,150 to a little more than 800. Nevertheless, this represented nearly 5% of families and over 4,000 persons.

Another metric is to measure the population at or below 200% of poverty. Per the 2000 Census, this group comprised about 20% of the total population, or 15,286 people. See Attachment N.

14. The Charlottesville area has consistently ranked at or near the bottom of urban regions in the state in housing affordability.

Deleted: The Virginia Real Estate Research Center at Virginia Commonwealth University measured housing affordability in Charlottesville as last in the state's urban regions in both 1992 and 1993 based on average home price, prevailing mortgage interest rates and median family income. Using Census derived information, about 14% of County households spend more than 30% of household income monthly on home owner costs. About 33% of households spend more than 30% on rent.

Updated Staff Analysis: Over time, housing affordability has decreased throughout the state. Of the homes owned in Albemarle, 19% (20% for Virginia) of the owners paid more than 30% of their monthly income towards housing costs in 1999. Also in 1999, 38% of Albemarle County and 34% of Virginia renters paid more than 30% of their income for rent. See Attachment O – Affordability. Housing assessment data is another indicator of affordability for home-buyers. Assessment data from 2000 to 2006 shows a widening gap between housing assessed below \$150,000 and above \$300,000. See Attachment P, Housing Assessment.

Per the October 2006 Housing Needs Report, the Thomas Jefferson Planning District Commission estimates that college students consume about 53% of the rental stock in Charlottesville area, which has an obvious impact on the Albemarle County rental stock. The study also notes that the students help drive up the cost of renting by bringing in cost-of-living allowances from parents who live in higher-cost-of-living areas. On page 12 of the main report, the authors note that the supply of rental housing is insufficient to keep pace with demand, as evidenced by the very low 2005 MSA vacancy rate of 3.9%.

In September 2007 the Charlottesville Area Association of Realtors (CAAR) database showed 97 properties in the County priced at \$190,000 or less; in November 2007, CAAR had 99 homes on the market priced at \$190,000 or less. CAAR's Q3 2007 market report indicates that there is roughly a *twenty* month supply of unsold housing inventory on the market in the Charlottesville MSA (page 6 of the report). This figure is well above the five- or six-month supply that, as a rule of thumb, is considered by many real estate professionals to represent a "balanced" housing market. This situation suggests strong downward pressure on housing prices in our region, a condition which might result in relatively greater housing affordability in the near future than has been the case in recent years.

One last metric, the Fourth-Quarter 2006 ACCRA Cost of Living Index, providing comparative data for 274 urban areas, including the Charlottesville Metro area, reported a composite index of 110.7 for this area, with 100 as the national average. Of six categories, housing costs were the highest component by far at 128.1 and utilities were the lowest at 92.4. For additional information about ACCRA, see: <http://www.coli.org/>

15. Agriculture and forestry, while not growing as a share of the overall Albemarle County economy, nevertheless remain an important component. When adjusted for inflation, total value of agricultural products sold in 1992 was about \$15.5 million, down from about \$16.8 million in 1987 and about \$21.0 million in 1974. Albemarle ranked 25th in the state, (1992) in total value of agricultural products sold and 15th in livestock sales. In some specialty areas, such as horses, grapes, peaches and apples, sheep and lamb operations, purebred cattle operations, pine stumpage value, and hay production, there is increasing activity and the County ranks higher among state, localities.

Updated Staff Analysis: From the last agriculture census in 2002, Albemarle County's total agriculture was \$19 million, down 13% from \$21 million in 1997, and ranked 35th in Virginia. Crop sales accounted for \$6.7 million, and livestock accounted for \$12 million of the total value. Average market value of production per farm dropped 14% from 1997, \$24,000 to 2002, \$20,000. Average size dropped from 202 acres in 1997 to 193 acres in 2002 and aggregate cash-farm-income was a deficit of \$1.8 million, or \$2,006 per farm. Even with these losses of production and farmland, the County continues to lead the state for horses and viticulture. See Attachments V & W.

16. An inventory of designated land exists in the County for economic expansion, some of

which is concentrated in larger consolidated areas.

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Deleted: 2007 Updated Data Analysis for the Economic Development Policy

Deleted: Nearly 1,400 acres of developable industrial land is designated in the County's Comprehensive Plan. Approximately 750 additional acres exist for office and commercial development. Approximately 450 acres of industrial land and 240 acres office/commercial land would need to be zoned for development to proceed. A September, 1993 report entitled "Consolidated Industrial Areas in Albemarle County" identified eight areas under one ownership or a limited number of ownerships ranging in size from 12 acres to 240 acres. Two areas exceeded 200 acres in size. (See Attachment X)

Updated Staff Analysis: Nearly 2,050 acres of land is designated for industrial uses in the County's Comprehensive land, of that as much as 933 is identified in 2007 as "vacant" or "underutilized," per a definition of having less than \$20,000 of building improvement. This represents a decline from the 1993 Comprehensive Plan's estimate of 1,381 acres of vacant land designated for Industrial Service. An examination of vacant land with the appropriate Light Industrial zoning as well as appropriate designation in the Comprehensive Plan for Industrial Service indicates a greater shortage of area for light industry: Of the deeded records, only 111 acres are vacant or underutilized. See Appendix X. The County should continue to monitor this situation while remaining aware of the fact that, in years to come, because of the differential in land prices between Albemarle and other jurisdictions in our region, Albemarle might have difficulty attracting light industrial firms.

ATTACHMENTS

| Population Size | | | | | | |
|-----------------|---------|-----------------|-----------------|-----------------|-----------|-----------------|
| Albemarle Co. | | | Charlottesville | | Virginia | |
| Year | Pop. | % Annual Growth | Pop. | % Annual Growth | Pop. | % Annual Growth |
| 1950 | 26,662 | --- | 25,969 | --- | 3,318,680 | --- |
| 1960 | 30,969 | 1.5% | 26,427 | 0.17% | 3,996,949 | 1.9% |
| 1970 | 37,780 | 2.0% | 38,880 | 3.94% | 4,651,448 | 1.5% |
| 1980 | 55,783 | 4.0% | 39,916 | 0.26% | 5,346,818 | 1.4% |
| 1990 | 68,172 | 2.0% | 40,831 | 0.23% | 6,216,884 | 1.5% |
| 2000 | 84,186 | 2.1% | 40,019 | -0.20% | 7,104,078 | 1.3% |
| 2010 | 96,247 | 1.3% | 40,639 | 0.15% | 8,010,342 | 1.2% |
| 2020 | 107,760 | 1.1% | 41,423 | 0.19% | 8,917,575 | 1.1% |

Sources: US Census, Weldon Cooper for past data, VEC for forecast

| | Population | Annual Births | Annual Deaths | Annual Natural Increase | Monthly Natural Increase | Population Change from t to t+1 | Natural Increase between t and t+1 | Implied Net Migration between t and t+1 | Percent of total population change due to net migration |
|----------------|------------|---------------|---------------|-------------------------|--------------------------|---------------------------------|------------------------------------|---|---|
| 2000 (April 1) | 84,186 | 1,054 | 632 | 422 | 35 | - | - | - | - |
| 2001 (July 1) | 85,800 | 968 | 574 | 394 | 33 | 1,614 | 514 | 1,101 | 68.2 |
| 2002 (July 1) | 86,700 | 973 | 594 | 379 | 32 | 900 | 387 | 514 | 57.1 |
| 2003 (July 1) | 88,100 | 1,018 | 606 | 412 | 34 | 1,400 | 396 | 1,005 | 71.8 |
| 2004 (July 1) | 89,600 | 960 | 598 | 362 | 30 | 1,500 | 387 | 1,113 | 74.2 |
| 2005 (July 1) | 90,400 | 1,056 | 650 | 406 | 34 | 800 | 384 | 416 | 52.0 |
| 2006 (July 1) | 90,806 | *** | *** | | | | | | |

Sources:

Average: 1,243

Average: 64.6

Weldon Cooper: http://www3.ccps.virginia.edu/demographics/estimates/2005/2005_estimates_Virginia.xls

Median 68.2

Dept of Health: <http://www.vdh.state.va.us/HealthStats/stats.asp>, 2006 data is provisional.

| Time Period | Population | Aggregate Growth Rate | WorkForce | Aggregate Growth Rate |
|-------------|------------|-----------------------|-----------|-----------------------|
| 1990 | 68,172 | --- | 32,613 | --- |
| 2000 | 84,186 | 23.5% | 38,838 | 19.1% |
| 2006 | 90,806 | 33.2% | 47,817 | 46.6% |

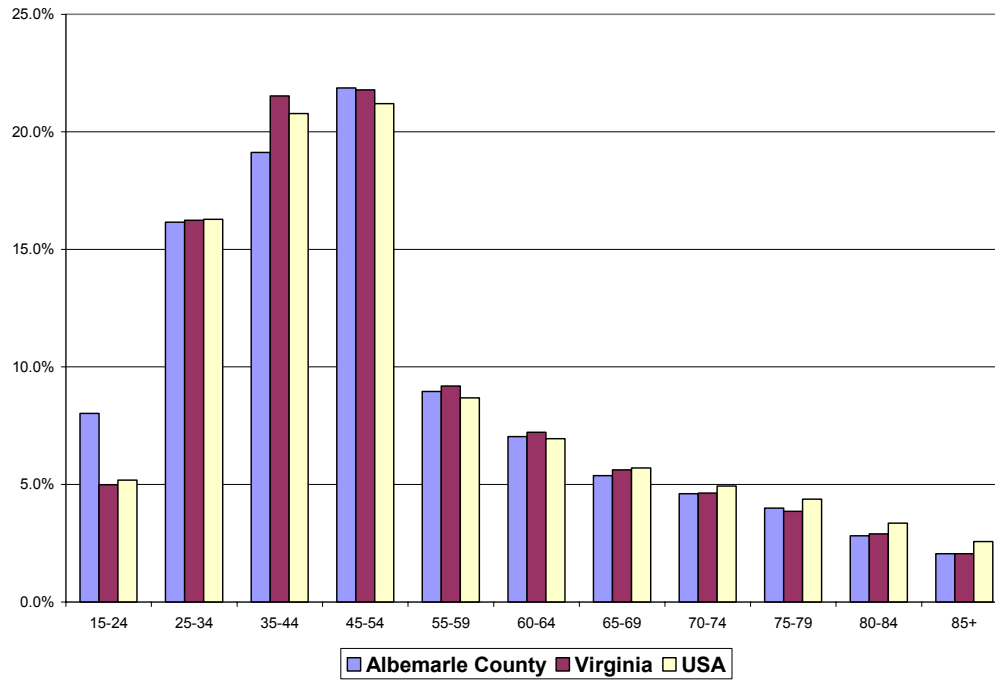
Source: VEC, Weldon Cooper Center

| Time Period | Population-Average Annual Growth | WorkForce-Average Annual Growth |
|-------------|----------------------------------|---------------------------------|
| 1990-2000 | 2.1% | 1.8% |
| 2000-2006 | 1.3% | 3.5% |
| 1990-2006 | 1.8% | 2.4% |

Source: VEC, Weldon Cooper Center

Attachment B – Age Demographics

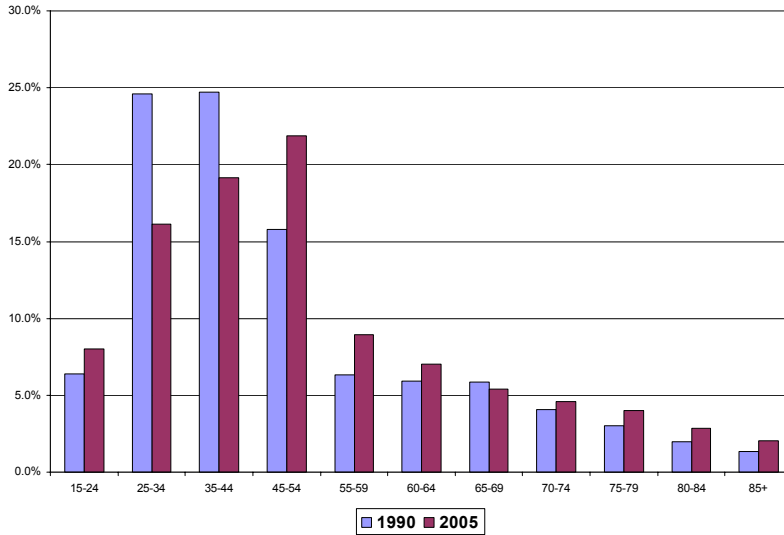
Head of Household Age Distribution
 Albemarle County, Virginia, and United State
 2005



Source: Claritas, Inc.; ZHA
 Tables/2005 age distribution

Comparing the County’s household age distribution to the state and nation indicates that Albemarle County has a greater proportion of its households headed by 15 to 24 year olds and fewer households headed by persons 35 to 44 years of age. Surprisingly, given the County’s reputation as a retirement destination, the County has a lower share of its households above the age of 65 as compared to the state and nation.

Head of Household Age Distribution
 Albemarle County
 1990 - 2005



Source: Claritas, Inc.; ZHA
 Tables/age distribution 1990 2005

The share of households headed by persons under 25 years of age has increased in the County while the share of households between the ages of 25 to 44 has dropped significantly over the last 15 years. The share of households headed by 45 to 64 year olds has increased along with households over 70 years of age.

| | | 1990 | 2006 | | 1990 | 2006 |
|----------------------|---------|------------|------------|-----------|-------|-------|
| | | % of | % of | | % of | % of |
| | 15-24 | % of Total | % of Total | 25-44 | Total | Total |
| VIRGINIA | 958,422 | 8% | 7% | 2,132,444 | 17% | 14% |
| ALBEMARLE | 12,608 | 9% | 8% | 23,559 | 17% | 12% |
| CULPEPER | 3,750 | 13% | 6% | 9,129 | 33% | 14% |
| FLUVANNA | 1,518 | 6% | 5% | 4,033 | 16% | 14% |
| GREENE | 1,262 | 6% | 6% | 3,721 | 18% | 15% |
| LOUISA | 2,594 | 6% | 6% | 6,442 | 16% | 13% |
| NELSON | 1,508 | 6% | 6% | 3,897 | 15% | 11% |
| ORANGE | 2,577 | 12% | 6% | 6,461 | 30% | 13% |
| CHARLOTTESVILLE CITY | 10,397 | 13% | 14% | 12,916 | 16% | 14% |

1990 US Census, Weldon Cooper Center

| Annual Not Seasonally-Adjusted Labor Force, Employment & Unemployment data in Albemarle County, VA, US | | | | | | |
|--|-------------------------|--|-----------------|-------------------|-------------|-------------|
| Year | AC Resident Labor Force | AC Employment | AC Unemployment | AC | VA | US |
| | | | | Unemployment Rate | | |
| 1982 | 27,543 | 26,038 | 1,505 | 5.5% | 7.7% | 9.7% |
| 1983 | 31,931 | 30,704 | 1,227 | 3.8% | 6.1% | 9.6% |
| 1984 | 33,830 | 32,516 | 1,314 | 3.9% | 5.0% | 7.5% |
| 1985 | 31,953 | 30,384 | 1,569 | 4.9% | 5.6% | 7.2% |
| 1986 | 31,682 | 30,507 | 1,175 | 3.7% | 5.0% | 7.0% |
| 1987 | 32,511 | 31,596 | 915 | 2.8% | 4.2% | 6.2% |
| 1988 | 33,682 | 32,778 | 904 | 2.7% | 3.9% | 5.5% |
| 1989 | 34,404 | 33,544 | 860 | 2.5% | 3.9% | 5.3% |
| 1990 | 36,961 | 36,053 | 908 | 2.5% | 4.3% | 5.5% |
| 1991 | 36,101 | 34,828 | 1,273 | 3.5% | 5.8% | 6.7% |
| 1992 | 37,256 | 35,720 | 1,536 | 4.1% | 6.4% | 7.4% |
| 1993 | 35,895 | 34,906 | 989 | 2.8% | 5.2% | 6.9% |
| 1994 | 36,603 | 35,766 | 837 | 2.3% | 4.7% | 6.1% |
| 1995 | 37,075 | 36,361 | 714 | 1.9% | 4.5% | 5.6% |
| 1996 | 38,160 | 37,361 | 799 | 2.1% | 4.3% | 5.4% |
| 1997 | 38,390 | 37,781 | 609 | 1.6% | 3.7% | 4.9% |
| 1998 | 39,644 | 39,193 | 451 | 1.1% | 2.8% | 4.5% |
| 1999 | 39,939 | 39,503 | 436 | 1.1% | 2.7% | 4.2% |
| 2000 | 43,304 | 42,562 | 742 | 1.7% | 2.3% | 4.0% |
| 2001 | 43,579 | 42,636 | 943 | 2.2% | 3.2% | 4.7% |
| 2002 | 44,263 | 43,073 | 1,190 | 2.7% | 4.2% | 5.8% |
| 2003 | 44,874 | 43,581 | 1,293 | 2.9% | 4.1% | 6.0% |
| 2004 | 47,095 | 45,918 | 1,177 | 2.5% | 3.7% | 5.5% |
| 2005 | 48,625 | 47,543 | 1,082 | 2.2% | 3.5% | 5.1% |
| 2006 | 49,761 | 48,572 | 1,189 | 2.4% | 3.0% | 4.6% |
| | | AVE. Ann Growth 1982-2006 | | 2.8% | 4.4% | 6.0% |
| | | AVE. Ann. Growth 1990-2000 | | 2.3% | 4.0% | 5.5% |
| | | AVE. Ann. Growth 2000-2006 | | 2.4% | 3.4% | 5.1% |
| | | Total resident labor growth, 1982-1992 | 35.3% | | | |
| | | Total resident labor growth, 1990-2000 | 17.2% | | | |

Bureau of Labor statistics, as reported by VEC, <http://www.vec.virginia.gov/vecportal/>

Note: The Bureau of Labor Statistics (BLS) uses a fundamentally diverging approach to counting employment than the VEC's process for collecting employment data, as reported in their Quarterly Census of Employment & Wages (QCEW). As a result, these two sources historically report differing numbers for "total employment." BLS Data collected in this attachment will not match QCEW data presented in Attachment J and elsewhere QCEW is cited.

Commute Patterns

| 2000 Census | | |
|-----------------|--------------------------|------------|
| | Albemarle County Workers | % of Total |
| Total | 39,151 | 100.0% |
| Albemarle | 21,455 | 54.8% |
| Charlottesville | 13,886 | 35.5% |

<http://www.census.gov/population/www/cen2000/commuting.html#VA>

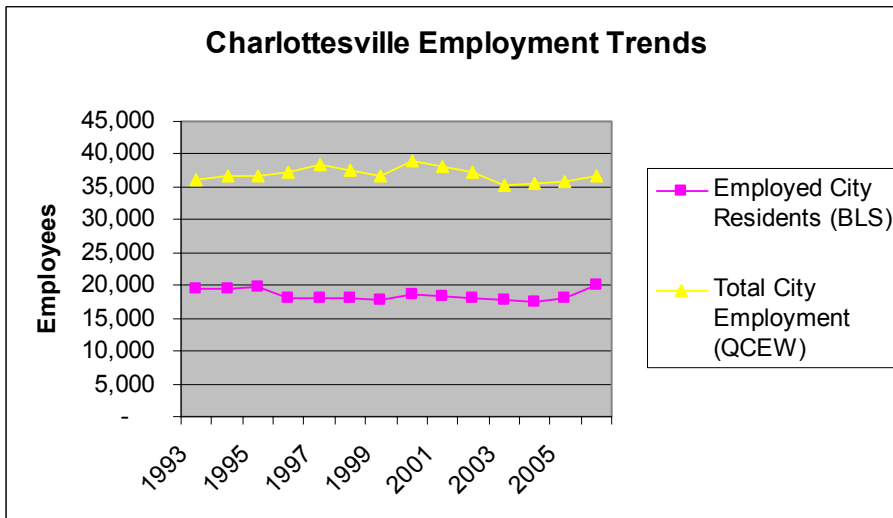
From the 2000 Census, 54.8 % of Albemarle County residents worked in Albemarle, 35.5 % of Albemarle County residents worked in the City of Charlottesville.

Top Employers

| 2000-2006 – 1 st Quarter figures , top 10-employers | | | | | | |
|--|-----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|-------------------------------|
| | First Quarter Results | | | | | |
| | 2000 | 2001 | 2002 | 2003 | 2004 | 2006 |
| 1 | UVA and UVA Health Services | UVA and UVA Health Services | UVA and UVA Health Services | UVA and UVA Health Services | UVA and UVA Health Services | UVA and UVA Health Services |
| 2 | County of Albemarle | County of Albemarle | County of Albemarle | County of Albemarle | County of Albemarle | County of Albemarle |
| 3 | State Farm Insurance | State Farm Insurance | State Farm Insurance | State Farm Insurance | State Farm Insurance | State Farm Insurance |
| 4 | GE Fanuc Automation Mfg. Inc. | GE Fanuc Automation Mfg. Inc. | Litton Marine | Northrop-Grumman (Litton) | Northrop-Grumman (Litton) | Northrop-Grumman Corporation |
| 5 | Comdial Business Communications | Litton Marine | GE Fanuc Automation Mfg. Inc. | GE Fanuc Automation Mfg. Inc. | Department of Defense | Department of Defense |
| 6 | Litton Marine | Comdial Business Communications | FIC Staffing Services and Systems | FIC Staffing Services and Systems | GE Fanuc Automation Mfg. Inc. | GE Fanuc Automation Mfg. Inc. |
| 7 | ConAgra Inc | Crutchfield Corp | Crutchfield Corp | Crutchfield Corp | FIC Staffing Services and Systems | Crutchfield Corp |
| 8 | FIC Staffing Services and Systems | Piedmont Community College | Piedmont Community College | Piedmont Community College | Crutchfield Corp | Boars Head Inn |
| 9 | Crutchfield Corp | FIC Staffing Services and Systems | Central Telephone Co. of VA | Boars Head Inn | Americare Plus | Americare Plus |
| 10 | Piedmont Community College | Boars Head Inn | Boars Head Inn | Americare Plus | Piedmont Community College | Piedmont Community College |

| Year | Employed City Residents (BLS) | Total City Employment (QCEW) |
|------|-------------------------------|------------------------------|
| 1993 | 19,451 | 36,199 |
| 1994 | 19,401 | 36,545 |
| 1995 | 19,726 | 36,616 |
| 1996 | 17,993 | 37,388 |
| 1997 | 18,198 | 38,502 |
| 1998 | 17,966 | 37,488 |
| 1999 | 17,857 | 36,792 |
| 2000 | 18,694 | 38,838 |
| 2001 | 18,391 | 37,981 |
| 2002 | 18,168 | 37,327 |
| 2003 | 17,848 | 35,376 |
| 2004 | 17,555 | 35,461 |
| 2005 | 18,176 | 35,965 |
| 2006 | 20,077 | 36,689 |

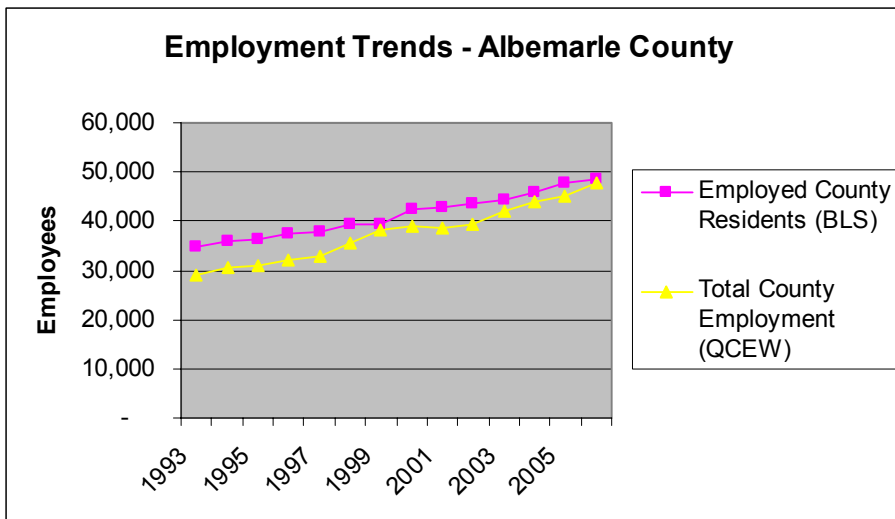
Source: VEC, Bureau of Labor Statistics, VEC Quarterly Census of Employment & Wages



Attachment E - Albemarle County Employment Trends

| Year | Employed County Residents (BLS) | Total County Employment (QCEW) |
|------|---------------------------------|--------------------------------|
| 1993 | 34,906 | 29,132 |
| 1994 | 35,766 | 30,397 |
| 1995 | 36,361 | 31,136 |
| 1996 | 37,361 | 32,276 |
| 1997 | 37,781 | 32,910 |
| 1998 | 39,193 | 35,687 |
| 1999 | 39,503 | 38,036 |
| 2000 | 42,562 | 38,838 |
| 2001 | 42,636 | 38,718 |
| 2002 | 43,732 | 39,478 |
| 2003 | 44,470 | 41,882 |
| 2004 | 45,918 | 43,822 |
| 2005 | 47,593 | 45,256 |
| 2006 | 48,572 | 47,817 |

Source: VEC, Bureau of Labor Statistics,
VEC Quarterly Census of Employment & Wages



Attachment F Albemarle County Industry Trends, 1990 – 2006, Average Annual Growth

| Albemarle County Employment by Place of Work and Industry | | | | | | A.C. Average Annual Growth | | | VA |
|---|--------|--------|--------|-----------------------|---------------|----------------------------|-----------|-----------|-----------|
| Industry Sector | 1990 | 2000 | 2006 | Percent of 2006 Total | Net 1990-2006 | 1990-2000 | 2000-2006 | 1990-2006 | 1990-2006 |
| Total | 32,613 | 38,838 | 47,817 | 100.0% | 15,204 | 1.8% | 3.5% | 2.4% | 1.6% |
| Govt Total | 11,880 | 11,336 | 15,753 | 32.9% | 3,873 | -0.5% | 5.6% | 1.8% | 3.9% |
| Govt State | 9,751 | 8,159 | 11,528 | 24.1% | 1,777 | -1.8% | 5.9% | 1.1% | 8.5% |
| Trade-Retail | 2,890 | 4,531 | 5,450 | 11.4% | 2,560 | 4.6% | 3.1% | 4.0% | 0.8% |
| Health Care | 869 | 3,034 | 4,133 | 8.6% | 3,264 | 13.3% | 5.3% | 10.2% | 2.0% |
| Govt Local | 2,065 | 3,106 | 3,535 | 7.4% | 1,470 | 4.2% | 2.2% | 3.4% | 9.2% |
| Manufacturing | 6,056 | 4,395 | 2,848 | 6.0% | (3,208) | -3.2% | -7.0% | -4.6% | -2.3% |
| Construction | 2,137 | 2,729 | 3,391 | 7.1% | 1,254 | 2.5% | 3.7% | 2.9% | 1.6% |
| Accommodation/Food | 2,386 | 2,078 | 2,997 | 6.3% | 611 | -1.4% | 6.3% | 1.4% | 2.3% |
| Other Services | 1,083 | 1,435 | 1,533 | 3.2% | 450 | 2.9% | 1.1% | 2.2% | 1.4% |
| Prof/Tech Svc. | 481 | 1,428 | 2,723 | 5.7% | 2,242 | 11.5% | 11.4% | 11.4% | 4.3% |
| Admin/Waste Svc. | 793 | 1,439 | 1,610 | 3.4% | 817 | 6.1% | 1.9% | 4.5% | 3.4% |
| Mgmt. of Companies | 820 | 1,199 | 1,514 | 3.2% | 694 | 3.9% | 4.0% | 3.9% | 5.6% |
| Arts/Enter/Rec | 534 | 947 | 1,172 | 2.5% | 638 | 5.9% | 3.6% | 5.0% | 1.6% |
| Information | 253 | 694 | 714 | 1.5% | 461 | 10.6% | 0.5% | 6.7% | 0.9% |
| Real Estate | 426 | 769 | 765 | 1.6% | 339 | 6.1% | -0.1% | 3.7% | 1.2% |
| Finance/Insurance | 439 | 815 | 864 | 1.8% | 425 | 6.4% | 1.0% | 4.3% | 1.8% |
| Trade-Wholesale | 450 | 565 | 607 | 1.3% | 157 | 2.3% | 1.2% | 1.9% | 1.0% |
| Educational Svc. | 240 | 431 | 621 | 1.3% | 381 | 6.0% | 6.3% | 6.1% | n/a |
| Agriculture | 465 | 487 | 466 | 1.0% | 1 | 0.5% | -0.7% | 0.0% | 0.2% |
| Transportation | 330 | 471 | 591 | 1.2% | 261 | 3.6% | 3.9% | 3.7% | 0.1% |
| Govt Federal | 64 | 71 | 690 | 1.4% | 626 | 1.0% | 46.1% | 16.0% | 2.0% |
| Mining | 64 | 45 | 54 | 0.1% | (10) | -3.5% | 3.1% | -1.1% | -3.1% |
| Utilities | *** | *** | *** | *** | *** | *** | *** | *** | -3.5% |

<http://velma.virtuallmi.com/analyzer/sainro.asp?cat=IND&session=ind202&time=&geo=>
as reported in the VEC's QCEW reports

Manufacturing Employment Losses

| Company | Peak Employment | Departure Date |
|----------------------------|-----------------|----------------|
| Comdial | 1,200 | 2001 |
| ConAgra | 890 | * |
| Acme Visible Records | 220 | * |
| Badger | 189 | 2007 |
| Siemens | 625 | * |
| Avionics Specialties | 200 | 2007 |
| Cooper Industries (Murray) | ** | 1991 |

* These companies left prior to June, 2005

** This data is unavailable

Source: County phone surveys, VEC data

Continued ---- Attachment F – 3rd Quarter QCEW 2006 Employment by Industry, 2-Digit NAIC, for City, Counties, and Virginia

| Industry Sector | A.C. Emp. | Ave. Ann. Growth Albemarle | Percent of Economic Base | | | |
|-----------------------|-----------|----------------------------|--------------------------|-----------|----------------|---------|
| | | | A.C. | VA | James City Co. | C'ville |
| Govt Total | 15,521 | 1.7% | 32.1% | 17.4% | 16.4% | 26.5% |
| Govt Federal | 693 | 16.1% | 1.4% | 4.2% | 0.1% | 1.7% |
| Govt State | 12,218 | 1.4% | 25.3% | 4.0% | 5.8% | 17.3% |
| Govt Local | 2,610 | 1.5% | 5.4% | 9.2% | 10.4% | 7.5% |
| Trade-Retail | 5,515 | 4.1% | 11.4% | 11.6% | 12.5% | 12.1% |
| Health Care | 4,162 | 10.3% | 8.6% | 9.0% | 5.7% | 9.8% |
| Manufacturing | 2,968 | -4.4% | 6.1% | 7.9% | 7.2% | 2.5% |
| Construction | 3,520 | 3.2% | 7.3% | 7.0% | 7.2% | 5.6% |
| Accommodation/Food | 3,078 | 1.6% | 6.4% | 8.3% | 12.4% | 13.4% |
| Other Services | 1,584 | 2.4% | 3.3% | 3.5% | 1.4% | 4.3% |
| Prof/Tech Services | 2,694 | 11.4% | 5.6% | 9.6% | 4.7% | 8.0% |
| Admin/Waste Ser | 1,566 | 4.3% | 3.2% | 5.8% | 3.9% | 2.9% |
| Mgmt. of Companies | 1,542 | 4.0% | 3.2% | 2.1% | 1.6% | 0.8% |
| Arts/Ent./Recreation | 1,350 | 6.0% | 2.8% | 1.5% | 13.9% | 0.5% |
| Finance/Insurance | 859 | 4.3% | 1.8% | 3.7% | 1.6% | 3.3% |
| Information | 727 | 6.8% | 1.5% | 2.5% | 0.5% | 4.1% |
| Real Estate | 783 | 3.9% | 1.6% | 1.6% | 4.0% | 1.7% |
| Trade-Wholesale | 621 | 2.0% | 1.3% | 3.3% | 2.6% | 2.0% |
| Educational Ser | 666 | 6.6% | 1.4% | 1.4% | 0.3% | 1.2% |
| Agriculture | 533 | 0.9% | 1.1% | 0.4% | 0.2% | 0.2% |
| Transportation | 585 | 3.6% | 1.2% | 2.8% | 3.5% | 0.9% |
| Mining | 56 | -0.8% | 0.1% | 0.3% | 0.0% | 0.0% |
| | | | 100.0% | 99.6% | 99.7% | 99.7% |
| Total N. of Employees | --- | --- | 48,340 | 3,638,687 | 26,237 | 36,681 |

Source: VEC "Community Profiles, as reported for Third-Quarter, 2006.

Attachment G – Industry Employment Forecast

Industry Employment & Projections data in Piedmont
Workforce Network, (LWIA VI) from Base Year 2004
to Projected Year 2014

| NAICS | Segment | 2004 | 2014 | Ave Ann. % | Total % |
|-------|-------------------------------------|--------|--------|------------|-----------|
| | Total | | | | 2004-2014 |
| 11 | Agriculture | 598 | 637 | 0.63 | 6.5 |
| 21 | Mining | *** | *** | *** | *** |
| 22 | Utilities | *** | *** | *** | *** |
| 23 | Construction | 12,335 | 14,038 | 1.3 | 13.8 |
| 31 | Manufacturing | 9,768 | 9,775 | 0.01 | 0.1 |
| 42 | Wholesale Trade | 3,592 | 3,936 | 0.92 | 9.6 |
| 44 | Retail Trade | 17,438 | 19,351 | 1.05 | 11 |
| 48 | Transportation/Warehousing | 2,375 | 2,734 | 1.42 | 15.1 |
| 51 | Information | 3,127 | 3,587 | 1.38 | 14.7 |
| 52 | Finance/Insurance | 3,047 | 3,251 | 0.65 | 6.7 |
| 53 | Real Estate | 2,173 | 2,515 | 1.47 | 15.7 |
| 54 | Professional/Technical | 7,112 | 10,771 | 4.24 | 51.4 |
| 55 | Mgmt of Companies | 2,034 | 2,482 | 2.01 | 22 |
| 56 | Administrative, Support, Waste Mgmt | 4,337 | 5,479 | 2.36 | 26.3 |
| 61 | Educational Services | 22,985 | 27,372 | 1.76 | 19.1 |
| 62 | Health Care/Social Services | 17,538 | 26,487 | 4.21 | 51 |
| 71 | Arts, Entertainment | 2,076 | 2,417 | 1.53 | 16.4 |
| 72 | Accommodation/Food Services | 12,644 | 15,390 | 1.98 | 21.7 |
| 81 | Other Services | 5,049 | 6,174 | 2.03 | 22.3 |

Source: VEC, Projections Team and Bureau of Labor Statistics

Attachment H – Occupations

Piedmont Workforce Network (LWIA VI) Occupations, Estimated 2004

| | VA | % of total | Subtotal | LWIA VI | %of Total | |
|-------------------|-----------|------------|----------|---------|-----------|-------|
| Total | 3,871,342 | 100.0% | | 153,544 | 100.0% | |
| Management | 165,801 | 4.3% | | 5,434 | 3.5% | |
| Business/Finance | 213,319 | 5.5% | | 5,731 | 3.7% | |
| Comput/Math | 174,514 | 4.5% | | 3,537 | 2.3% | |
| Arch/Eng | 80,480 | 2.1% | | 2,773 | 1.8% | |
| Science | 39,816 | 1.0% | | 2,677 | 1.7% | |
| Social Services | 40,058 | 1.0% | | 1,415 | 0.9% | |
| Legal | 35,513 | 0.9% | | 1,029 | 0.7% | |
| Edu/Library | 208,884 | 5.4% | | 12,000 | 7.8% | |
| Arts/Sports/media | 61,761 | 1.6% | | 2,470 | 1.6% | |
| Health care | 231,748 | 6.0% | 32.3% | 12,651 | 8.2% | 32.4% |
| Protective Svc | 85,950 | 2.2% | | 3,409 | 2.2% | |
| Food prep | 267,198 | 6.9% | | 13,262 | 8.6% | |
| Bldg Maintenance | 151,643 | 3.9% | | 6,172 | 4.0% | |
| Personal care | 113,668 | 2.9% | | 4,449 | 2.9% | |
| Sales | 462,951 | 12.0% | | 17,333 | 11.3% | |
| Office & Admin | 594,579 | 15.4% | 43.3% | 24,792 | 16.1% | 45.2% |
| | | | 75.6% | | | 77.6% |
| Farming/Fishing | 50,191 | 1.3% | | 783 | 0.5% | |
| Construc./Extrac | 246,449 | 6.4% | | 12,056 | 7.9% | |
| Instal/Repair | 169,785 | 4.4% | | 6,172 | 4.0% | |
| Production | 222,564 | 5.7% | | 7,119 | 4.6% | |
| Transp/Moving | 254,470 | 6.6% | | 8,280 | 5.4% | |
| | | | 24.4% | | | 22.4% |

Source: VEC, Industry & Occupational Projections, 2004-2014
 No data available for Albemarle County.

| Occupations, TJPDC, per 2000 Census | TJPDC | C'ville | Albemarle | Fluvanna | Greene | Louisa | Nelson |
|---|---------------|--------------------|--------------------|-------------------|-------------------|--------------------|-------------------|
| Managerial, professional | 40,373 | 9,206 44% | 20,541 52% | 3,272 33% | 2,549 32% | 2,936 24% | 1,869 28% |
| Service | 13,916 | 4,092 20% | 4,415 11% | 1,504 15% | 1,206 15% | 1,683 14% | 1,016 15% |
| Sales & Office | 23,100 | 4,874 23% | 8,860 22% | 2,750 28% | 2,109 26% | 3,025 25% | 1,482 22% |
| Subtotal | | 87% | 85% | 77% | 73% | 63% | 64% |
| Farming, fishing & forestry | 792 | 42 0% | 249 1% | 111 1% | 51 1% | 142 1% | 197 3% |
| Construction, extraction, maintenance | 9,827 | 1,189 6% | 3,061 8% | 1,167 12% | 1,106 14% | 2,223 18% | 1,081 16% |
| Production, transportation, material moving | 9,367 | 1,540 7% | 2,458 6% | 1,008 10% | 1,064 13% | 2,195 18% | 1,102 16% |
| Total | 97,402 | 20,943 100% | 39,584 100% | 9,812 100% | 8,085 100% | 12,204 100% | 6,774 100% |

Source: US Census, as reported by Thomas Jefferson Planning District Commission

| US Census - Albemarle County | | | | |
|--|--------|------|--------|--------|
| Summary table | 2000 | | 2005 | |
| | | % | | % |
| Population 25 years + | 53,847 | 100% | 57,291 | 100.0% |
| Less than high school graduate | 6,759 | 13% | 5,901 | 10.3% |
| High school graduate (incl. equivalency) | 9,591 | 18% | 8,880 | 15.5% |
| Some college | 11,822 | 22% | 11,458 | 20.0% |
| Bachelor's degree, and up | 25,675 | 48% | 31,109 | 54.3% |
| | | 100% | | 100% |

http://factfinder.census.gov/servlet/STTable?_bm=y&-geo_id=05000US51003&qv_name=ACS_2005_EST_G00_S1501&-ds_name=ACS_2005_EST_G00_

For the 2005 American Community Survey, the US Census uses a point-estimate system. For the above table there is a margin of error of 1.1%, or +/-633 of 57,291 persons estimated.

Attachment J – Number of Companies versus Employment Growth

| Employers & Average Employment by Company (Covered Employment & Wages in Virginia) | | | | | |
|---|------|------------------|------------------|-------------------|------------------------------------|
| | Year | No. of companies | Total Employment | County Population | Average No. of Employees / Company |
| | 1990 | 1,462 | 32,581 | 68,172 | 22 |
| | 1993 | 1,584 | 29,167 | | 18 |
| | 1994 | 1,685 | 29,147 | | 17 |
| | 2000 | 2,039 | 38,249 | | 19 |
| | 2004 | 2,393 | 42,470 | | 18 |
| | 2005 | | 45,256 | 90,400 | |
| | 2006 | 2,640 | 47,817 | 90,806 | 18 |
| | | | | | |
| Annual Growth | | 3.8% | 2.4% | 1.8% | |

Source: VEC Annualized QCEW Employment data, cooper center demographics

<http://www.coopercenter.org/demographics/sitefiles/documents/excel/popestimatesagesexrace/2006agesex.xls>

Employment by Size of Establishment

| Employment by Size of Establishment | Albemarle Employees | AC % of Total | Virginia Employees | VA % of Total |
|-------------------------------------|---------------------|---------------|--------------------|---------------|
| 0, no employment | 11 | 0.0% | 993 | 0.0% |
| 1 to 4 employees | 2,591 | 5.4% | 195,701 | 5.4% |
| 5 to 9 employees | 3,084 | 6.4% | 254,140 | 7.0% |
| 10 to 19 employees | 4,288 | 8.9% | 362,705 | 10.0% |
| 20 to 49 employees | 6,615 | 13.7% | 597,679 | 16.4% |
| 50 to 99 employees | 4,532 | 9.4% | 466,329 | 12.8% |
| 100 to 249 employees | 6,297 | 13.0% | 571,754 | 15.7% |
| 250 to 499 employees | 4,025 | 8.3% | 372,164 | 10.2% |
| 500-999 employees | *** | *** | 275,384 | 7.6% |
| 1000 and over | *** | *** | 541,838 | 14.9% |
| | 48,340 | | 3,638,687 | |

Source: VA Employment Commission (VEC)

Quarterly Census of Employment & Wages (QCEW), 3rd-Quarter (July, September, August), 2006

Note: Asterisks (***) indicate non-disclosable data.

Attachment K – Median Income per VA Income Tax Returns, 1999 to 2004

| Adjusted Gross Income on Commonwealth of Virginia Individual Income Tax Returns | | | | | | | | |
|---|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--------|
| Median Adjusted Gross Income | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | Ave. Ann. | |
| All returns (combined) | | | | | | | | Growth |
| Charlottesville City | \$ 21,102 | \$ 22,403 | \$ 21,831 | \$ 21,903 | \$ 21,482 | \$ 22,675 | | 1.4% |
| Albemarle County | \$ 33,175 | \$ 34,739 | \$ 34,636 | \$ 34,046 | \$ 34,383 | \$ 35,047 | | 1.1% |
| Charlottesville MSA | \$ 27,739 | \$ 29,392 | \$ 29,428 | \$ 29,269 | \$ 29,172 | \$ 30,084 | | 1.6% |
| State of Virginia | \$ 28,236 | \$ 29,539 | \$ 30,116 | \$ 30,203 | \$ 30,718 | \$ 31,780 | | 2.4% |
| Married couple returns | | | | | | | | |
| Charlottesville City | \$ 47,239 | \$ 50,560 | \$ 49,716 | \$ 49,154 | \$ 48,340 | \$ 52,122 | | 2.0% |
| Albemarle County | \$ 63,010 | \$ 66,175 | \$ 66,240 | \$ 65,629 | \$ 66,456 | \$ 69,452 | | 2.0% |
| Charlottesville MSA | \$ 54,720 | \$ 57,783 | \$ 58,268 | \$ 57,964 | \$ 56,860 | \$ 59,660 | | 1.7% |
| State of Virginia | \$ 53,745 | \$ 56,530 | \$ 57,619 | \$ 57,924 | \$ 59,250 | \$ 62,109 | | 2.9% |
| Source: Virginia Department of Taxation data on Cooper Center web site: | | | | | | | | |
| http://www.virginia.edu/coopercenter/vastat/income/income.html#AGI | | | | | | | | |
| Note: MSA was redefined in 2003 | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

Of all 2004 returns Albemarle County median income was 110% of the State's; of the married-couple 2004 returns, Albemarle County was 111% of the State's.

Attachment L – Median Household Income, Per US Census 2000

| Income Concept | 2000 Census | American Community Survey, 2005 | Ave. Ann. Growth |
|-------------------------|-------------|---------------------------------------|---------------------|
| Median household income | \$ 44,356 | | |
| Charlottesville City | \$ 31,007 | not available | |
| Albemarle County | \$ 50,749 | \$ 60,398 | 3.5% |
| Charlottesville MSA | \$ 44,356 | \$ 62,286 | ----- |
| State of Virginia | \$ 46,677 | \$ 54,240 | 3.0% |
| Median family income | | | |
| Charlottesville City | \$ 45,110 | not available | |
| Albemarle County | \$ 63,407 | \$ 77,297 | 4.0% |
| Charlottesville MSA | \$ 55,455 | \$ 47,543 | ----- |
| State of Virginia | \$ 54,169 | \$ 65,174 | 3.8% |

Source: US Census Bureau

Note: Area covered by MSA was changed in 2003, so data are not directly comparable.

For the American Community Survey data, the margin of error is +/- \$6,065 of the reported \$60,398.

Attachment M – Wages indexed to the State

| Ablemarle County Index | 1995 | | 1996 | | 1997 | | 1998 | | 1999 | | 2000 | | 2001 | | 2002 | | 2003 | | 2004 | | 2005 | |
|---|------|--------|------|-------|------|-------|------|-------|------|-------|------|-------|------|-------|------|-------|------|-------|------|-------|-------|-------|
| | AC | *Index | AC | Index | AC | Index | AC | Index | AC | Index | AC | Index | AC | Index | AC | Index | AC | Index | AC | Index | AC | Index |
| Total, All industries | 501 | 96.9 | 523 | 97.2 | 536 | 94.4 | 581 | 96.2 | 601 | 94.6 | 648 | 95.9 | 657 | 93.1 | 667 | 93.2 | 694 | 93.5 | 735 | 0.94 | 771 | 94.8 |
| Agriculture, Forestry | 354 | 106.6 | 355 | 103.2 | 368 | 99.2 | 397 | 104.5 | 399 | 101.8 | 430 | 110.3 | 411 | 101.7 | 429 | 104.6 | 438 | 102.3 | 441 | 0.99 | 441 | 94.6 |
| Mining | 769 | 107.1 | 888 | 119.0 | 773 | 103.3 | 726 | 93.6 | 730 | 91.6 | 748 | 88.4 | 786 | 91.2 | 840 | 97.0 | 985 | 110.9 | 987 | 1.03 | 921 | 92.4 |
| Utilities | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Construction | 436 | 87.6 | 459 | 88.4 | 482 | 87.8 | 525 | 91.6 | 547 | 90.6 | 571 | 89.5 | 583 | 86.9 | 589 | 86.1 | 618 | 88.5 | 650 | 0.88 | 679 | 88.0 |
| Manufacturing | 619 | 106.4 | 673 | 111.2 | 709 | 112.4 | 741 | 113.1 | 790 | 117.7 | 845 | 120.5 | 881 | 119.5 | 854 | 112.4 | 971 | 122.9 | 958 | 1.17 | 983 | 115.5 |
| Wholesale Trade | 517 | 72.8 | 534 | 71.8 | 593 | 74.6 | 651 | 78.1 | 717 | 78.5 | 768 | 77.3 | 832 | 84.2 | 854 | 87.3 | 841 | 82.9 | 895 | 0.83 | 885 | 79.5 |
| Retail Trade | 340 | 104.9 | 347 | 104.2 | 362 | 104.6 | 395 | 109.4 | 476 | 126.3 | 478 | 121.3 | 441 | 107.8 | 459 | 108.0 | 462 | 106.0 | 481 | 1.07 | 501 | 108.4 |
| Transportation, Warehousing | 443 | 77.2 | *** | *** | 504 | 82.1 | 520 | 80.5 | 516 | 77.6 | 526 | 75.4 | 542 | 75.5 | 573 | 76.2 | 572 | 76.9 | 610 | 0.78 | 644 | 81.9 |
| Information | 496 | 62.7 | 535 | 60.5 | 588 | 60.2 | 576 | 47.1 | 669 | 49.1 | 642 | 45.5 | 636 | 44.4 | 756 | 62.2 | 813 | 64.6 | 972 | 0.73 | 1,020 | 73.4 |
| Finance&Insurance | 650 | 96.4 | 655 | 90.8 | 619 | 77.4 | 627 | 72.4 | 659 | 74.5 | 707 | 75.1 | 851 | 80.1 | 880 | 81.3 | 971 | 82.1 | 997 | 0.79 | 1,123 | 83.6 |
| Real Estate | 409 | 93.6 | 459 | 98.5 | 475 | 97.5 | 526 | 101.3 | 463 | 83.9 | 555 | 95.0 | 606 | 97.0 | 607 | 93.8 | 658 | 97.8 | 733 | 1.01 | 792 | 101.9 |
| Professional/Technical Svcs | 562 | 67.8 | 662 | 76.0 | 689 | 74.3 | 717 | 72.6 | 723 | 68.3 | 746 | 65.3 | 798 | 66.8 | 847 | 69.4 | 890 | 69.8 | 840 | 0.63 | 901 | 63.3 |
| Mgmt of Companies | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | 850 | 63.5 | *** | *** | 950 | 0.62 | 1026 | 62.1 |
| Admin & Waste Svcs | 309 | 98.1 | 292 | 90.1 | 283 | 83.5 | 272 | 74.9 | 324 | 84.4 | 359 | 85.7 | 366 | 81.7 | 385 | 82.4 | 371 | 75.4 | 460 | 0.87 | 504 | 94.6 |
| Educational Services | 641 | 130.5 | 644 | 128.0 | 636 | 122.1 | 706 | 132.7 | 698 | 125.8 | 785 | 135.8 | 795 | 132.3 | 783 | 127.1 | 801 | 127.8 | 840 | 1.29 | *** | *** |
| Health Care, Social Svcs | 420 | 81.6 | 431 | 81.8 | 444 | 83.0 | 626 | 113.0 | 612 | 107.6 | 675 | 113.6 | 705 | 112.4 | 722 | 110.2 | 743 | 110.2 | 773 | 1.10 | 838 | 115.4 |
| Arts, Entertainment | 307 | 105.9 | 291 | 99.3 | 310 | 102.3 | 339 | 106.9 | 385 | 121.1 | 428 | 127.8 | 411 | 118.8 | 443 | 123.4 | 415 | 110.7 | 445 | 1.17 | 447 | 115.5 |
| Accommodation, Food Svcs | 222 | 114.4 | 237 | 117.9 | 238 | 112.8 | 247 | 110.8 | 264 | 113.3 | 282 | 116.5 | 275 | 110.9 | 280 | 110.2 | 282 | 107.6 | 290 | 1.07 | 297 | 106.1 |
| Other Svcs, ex. Public Admin | 335 | 84.8 | 370 | 89.4 | 405 | 94.0 | 432 | 95.4 | 466 | 98.3 | 503 | 101.2 | 542 | 103.4 | 573 | 105.9 | 594 | 106.6 | 624 | 1.08 | 652 | 108.8 |
| Public Administration | 489 | 71.3 | 516 | 73.1 | 546 | 69.8 | 569 | 70.7 | 595 | 73.4 | 605 | 70.1 | 611 | 67.6 | 645 | 67.2 | 705 | 70.3 | 1079 | 1.02 | 1085 | 99.0 |
| Unclassified | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| *State average = 100 | | | | | | | | | | | | | | | | | | | | | | |
| Source: VEC QCEW (2digit) data for Ablemarle and Virginia | | | | | | | | | | | | | | | | | | | | | | |

Note: Federal, state and local government wage data are included in the corresponding industry sectors above.

Attachment N – Number of Families below Poverty

| People and families living below the poverty level | Number of People | Percent of People | Number of Families | Percent of Families |
|--|------------------|-------------------|--------------------|---------------------|
| Albemarle 1990 | 4,676 | 7.6% | 819 | 4.8% |
| Albemarle 2000 | 5,232 | 6.7% | 879 | 4.2% |
| Charlottesville 1990 | 9,025 | 23.7% | 843 | 10.0% |
| Charlottesville 2000 | 9,950 | 25.9% | 935 | 12.0% |
| Virginia 1990 | 611,611 | 10.2% | 126,897 | 7.7% |
| Virginia 2000 | 656,641 | 9.6% | 129,890 | 7.0% |

Source: US Census

200% of Poverty

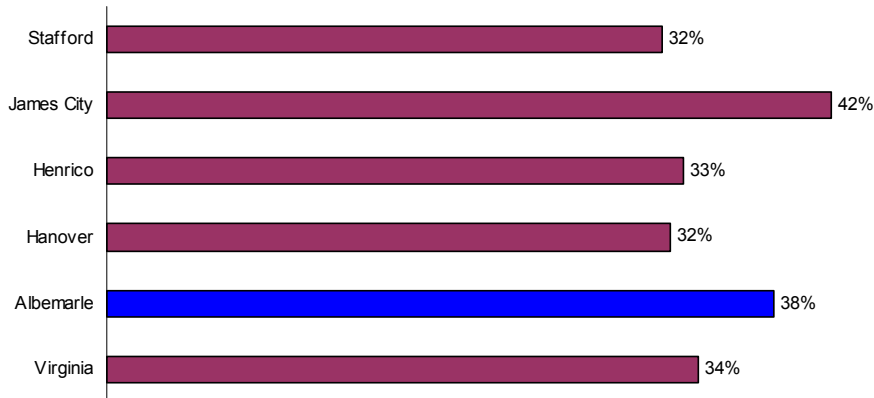
| | | | |
|-------------------------------|--------------------------|----------------------------|------------------------------------|
| All individuals below: | | | |
| 50 percent of poverty level | 2,524 | (X) | (X) |
| 125 percent of poverty level | 7,131 | (X) | (X) |
| 130 percent of poverty level | 7,709 | (X) | (X) |
| Children under 18 years | 2,019 | (X) | (X) |
| Children 5 to 17 years | 1,417 | (X) | (X) |
| 150 percent of poverty level | 9,728 | (X) | (X) |
| 175 percent of poverty level | 12,411 | (X) | (X) |
| 185 percent of poverty level | 13,456 | (X) | (X) |
| Children under 18 years | 3,832 | (X) | (X) |
| Children 5 to 17 years | 2,616 | (X) | (X) |
| 200 percent of poverty level | 15,286 | (X) | (X) |
| Poverty Status | Number | | Percent below poverty level |
| | All income levels | Below poverty level | |

(X) Not applicable.

Source: U.S. Census Bureau, Census 2000 Summary File 3, Matrices PCT49, PCT50, PCT51, PCT52, PCT53, PCT54, and PCT55.

Attachment O – Housing Affordability Gap

Of the Rental Units in Albemarle, 38% of Occupants Paid More than 30% of Their Income for the Rental Unit. This Rate Is Higher than the State-wide Rate of 34%.



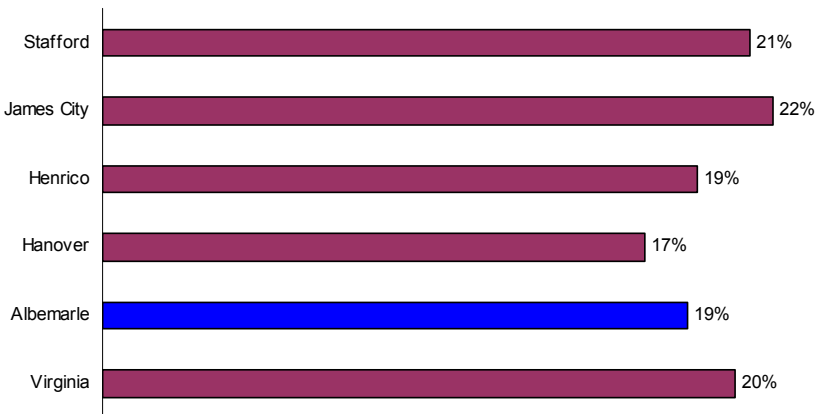
| % of Income for Rent | Virginia | Albemarle | Hanover | Henrico | James City | Stafford |
|----------------------|----------|-----------|---------|---------|------------|----------|
| <30% of Income | 58% | 55% | 59% | 63% | 52% | 63% |
| >30% of Income | 34% | 38% | 32% | 33% | 42% | 32% |
| Not computed | 8% | 7% | 9% | 5% | 7% | 6% |

Source: US Census 2000 Table DP-4

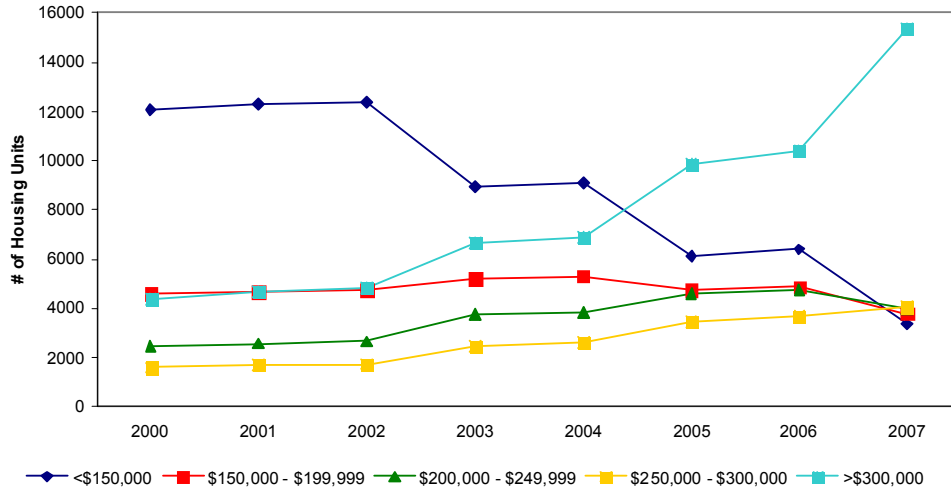
| Median Gross Rent | Virginia | Albemarle | Hanover | Henrico | James City | Stafford |
|--|----------|-----------|---------|---------|------------|----------|
| Median Gross Rent in 1999 | \$650 | \$712 | \$686 | \$676 | \$703 | \$842 |
| Median gross rent as a % of household income in 1999 | 25% | 26% | 25% | 24% | 28% | 24% |

Source: US Census 2000 Tables H63 and H70

In 1999, 19% of the Albemarle County Home Owners Paid More than 30% of Their Monthly Income towards Housing Costs



In 2006, Housing Assessments Widen the Gap Between Housing Above and Below \$300,000



County Assessment Housing Values

Over the past seven years there has been a drastic transition between housing below \$150,000 and housing above \$300,000. As the number of housing units assessed below \$150,000 has fallen, the number of housing units assessed above \$300,000 has dramatically increased from 4,377 units in 2000 to 15,347 in 2007. After 2004, the gap between housing units assessed above and below \$300,000 has continued to widen with 2006 becoming the most significant gap in the past seven years.

| | <u>2000</u> | <u>2001</u> | <u>2002</u> | <u>2003</u> | <u>2004</u> | <u>2005</u> | <u>2006</u> | <u>2007</u> |
|-----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| <\$150,000 | 12071 | 12313 | 12384 | 8967 | 9118 | 6109 | 6405 | 3339 |
| \$150,000 - \$199,999 | 4592 | 4667 | 4744 | 5215 | 5303 | 4763 | 4870 | 3784 |
| \$200,000 - \$249,999 | 2450 | 2575 | 2669 | 3746 | 3863 | 4605 | 4728 | 3975 |
| \$250,000 - \$300,000 | 1594 | 1679 | 1725 | 2474 | 2597 | 3469 | 3685 | 4058 |
| >\$300,000 | 4377 | 4661 | 4826 | 6654 | 6896 | 9887 | 10401 | 15347 |

Methodology: Reassessment used to take place every 2 years, so the 2001, 2003 and 2005 data is what the county assessment was based on and the intervening years were state mandated reworking of the county's assessment done by the Real Estate office. That explains the sudden jumps and dips in the data every two years.

Source: Chris Carlson, Information Technology. 21 June 2007.

Attachment R – Albemarle County Travel Expenditures

| Year | Occupancy | | | | | | Room Rate | |
|----------|-----------|-------|-------|-------|-------|-------|-----------|-------|
| | AC | % Chg | Nat'l | % Chg | State | % Chg | This Year | % Chg |
| 1987 | 63.0 | | 63.3 | | 63.9 | | 46.58 | |
| 1988 | 66.7 | 5.9 | 63.4 | 0.0 | 63.0 | (1.4) | 48.97 | 5.1 |
| 1989 | 65.4 | (1.9) | 64.1 | 1.2 | 63.1 | (0.0) | 49.72 | 1.5 |
| 1990 | 64.5 | (1.4) | 63.5 | (1.1) | 60.5 | (4.1) | 56.08 | 12.8 |
| 1991 | 60.6 | (6.0) | 61.6 | (2.8) | 59.2 | (2.0) | 55.45 | (1.1) |
| 1992 | 61.9 | 2.1 | 62.2 | 1.1 | 60.4 | 2.0 | 56 | 1.0 |
| 1993 | 67.6 | 9.2 | 63.1 | 1.4 | 62.0 | 2.8 | 58.28 | 4.1 |
| 1994 | 67.9 | 0.4 | 64.3 | 1.9 | 62.9 | 1.5 | 59.51 | 2.1 |
| 1995 | 67.9 | 0.0 | 64.6 | 0.4 | 62.5 | (0.7) | 61.33 | 3.1 |
| 1996 | 68.5 | 0.9 | 64.4 | (0.3) | 62.6 | 0.1 | 62.87 | 2.5 |
| 1997 | 67.0 | (2.2) | 63.9 | (0.7) | 62.5 | 0.1 | 68.1 | 8.3 |
| 1998 | 63.7 | (4.9) | 63.1 | (1.1) | 62.4 | (0.1) | 70.32 | 3.3 |
| 1999 | 65.4 | 2.7 | 62.6 | (0.9) | 62.0 | (0.5) | 73.18 | 4.1 |
| 2000 | 65.6 | 0.3 | 63.1 | 0.7 | 62.3 | 0.3 | 81.17 | 10.9 |
| 2001 | 63.9 | (2.6) | 59.7 | (5.5) | 59.1 | (4.9) | 83.63 | 3.0 |
| 2002 | 63.9 | (0.0) | 58.9 | (1.1) | 59.4 | 0.4 | 80.7 | (3.5) |
| 2003 | 67.4 | 5.5 | 58.9 | 0.3 | 60.7 | 2.9 | 79.9 | (1.0) |
| 2004 | 69.6 | 3.1 | 61.1 | 3.7 | 62.0 | 2.0 | 80.8 | 1.1 |
| 2005 | 71.1 | 2.2 | 62.9 | 3.0 | 62.4 | 0.8 | 83.2 | 3.1 |
| Ave Ann. | 0.7% | | 0.0% | | -0.1% | | 3.3% | |

Source: Smith Travel Research, as reported to the Charlottesville-Albemarle Convention & Visitor's Bureau
 Note: "AC" includes Albemarle County and City of Charlottesville hotels.

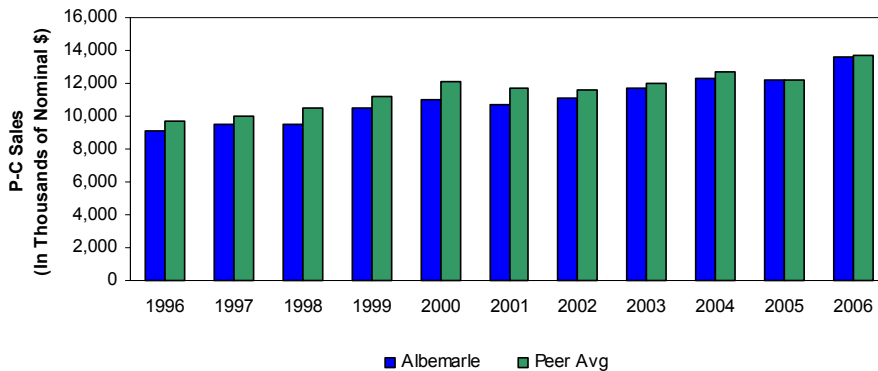
Attachment S – Taxable Sales and BPOL

| 2006 Taxable Sales, Albemarle | | Amount | No. of Dealers | Amt. Per Dealer |
|-------------------------------|---|-----------------|----------------|-----------------|
| NAICS | Business Class | | | |
| 0 | No NAICS info | 132,453,509 | 164 | 807,643 |
| 111 | Crop production | 1,934,997 | 8 | 241,875 |
| 237 | Heavy & Civil Engineering Construction | 5,319,707 | 8 | 664,963 |
| 238 | Specialty Trade Contractors | 2,948,614 | 20 | 147,431 |
| 311 | Food manufacturing | 1,169,310 | 6 | 194,885 |
| 312 | Beverage & tobacco Manufacturing | 2,531,914 | 6 | 421,986 |
| 321 | Wood Product manufacturing | 2,692,863 | 6 | 448,811 |
| 323 | Printing | 2,285,058 | 9 | 253,895 |
| 327 | Nonmetallic mineral product manufacturing | 1,854,489 | 5 | 370,898 |
| 332 | Fabricated metal product manufacturing | 3,319,480 | 7 | 474,211 |
| 334 | Computer & Electronic Product Manufactur | 779,222 | 7 | 111,317 |
| 339 | Misc Manufacturing | 8,991,436 | 28 | 321,123 |
| 421 | Wholesalers, Durable Goods | 1,618,794 | 8 | 202,349 |
| 423 | Merchant wholesalers, durable goods | 23,244,755 | 67 | 346,937 |
| 424 | Merchant wholesalers, nondurable goods | 4,282,606 | 10 | 428,261 |
| 425 | Wholesale Electronics | 4,601,722 | 6 | 766,954 |
| 441 | Motor Vehicle & Parts dealers | 30,333,407 | 26 | 1,166,670 |
| 442 | Furniture & Home Furnishings | 38,247,247 | 68 | 562,460 |
| 443 | Electronics & Appliance Stores | 19,771,265 | 26 | 760,433 |
| 444 | Building Material, Garden, Supplies Dealer | 190,590,817 | 46 | 4,143,279 |
| 445 | Food & Beverage Stores | 176,473,816 | 69 | 2,557,592 |
| 446 | Health & Personal Care stores | 4,877,007 | 22 | 221,682 |
| 447 | Gas Stations | 22,835,633 | 35 | 652,447 |
| 448 | Clothing & Clothing accessories | 48,401,540 | 87 | 556,340 |
| 451 | Sporting, Hobby, Book & Music Stores | 35,680,333 | 119 | 299,835 |
| 452 | General Merchandise Stores | 169,605,599 | 22 | 7,709,345 |
| 453 | Misc. Store Retailers | 32,720,448 | 173 | 189,136 |
| 454 | Nonstore Retailers | 33,120,385 | 65 | 509,544 |
| 511 | Publishing Industries | 373,845 | 7 | 53,406 |
| 531 | Real Estate | 761,154 | 7 | 108,736 |
| 532 | Rental & Leasing Services | 23,652,398 | 211 | 112,097 |
| 541 | Prof., Scientific, & Technical Svces | 4,900,646 | 58 | 84,494 |
| 561 | Administrative Support Services | 2,962,622 | 21 | 141,077 |
| 611 | Educational Services | 15,085,179 | 173 | 87,198 |
| 621 | Ambulatory Health Care Services | 299,061 | 12 | 24,922 |
| 623 | Nursing and Residential Care Facilities | 866,239 | 10 | 86,624 |
| 711 | Performing Arts, Spectator Sports & Related | 38,975 | 8 | 4,872 |
| 713 | Amusement, Gambling, & Recreation Indu | 6,577,477 | 11 | 597,952 |
| 721 | Accommodation | 51,285,721 | 30 | 1,709,524 |
| 722 | Food Services & Drinking Places | 76,333,807 | 154 | 495,674 |
| 811 | Repair & Maintenance | 12,631,763 | 38 | 332,415 |
| 812 | Personal & Laundry Services | 1,778,361 | 45 | 39,519 |
| 813 | Religious, Grantmaking, Civic, Professiona | 6,294,629 | 11 | 572,239 |
| | | \$1,206,527,850 | | |

Source: VA Dept of Taxation, Calendar Year ending 12/31/2006

The count of dealers represents active dealers that reported taxable sales during the reporting period

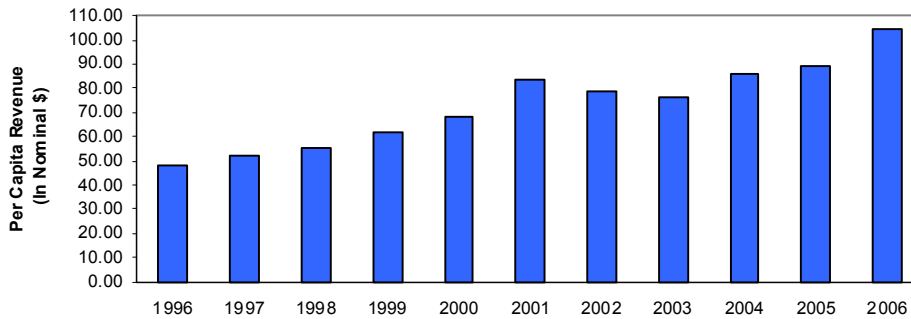
Per Capita Taxable Sales Have Increased Comparably with the Average of Peer Counties



The County's per capita taxable sales have increased by approximately 50% between 1996 and 2006, an increase that is better than that of the peer average (42%). Albemarle's per capita sales are consistently lower than the peer average, however, perhaps because of the proximity of shopping opportunities in Charlottesville, and the fact that our region contains a high number of students, many of whom do not live and shop in the area the entire year.

Source: Weldon Cooper Center, (http://www.virginia.edu/coopercenter/vastat/taxablesales/tax_sales.html).
 Population: Weldon Cooper Center, (<http://www.coopercenter.org/demographics/POPULATION%20ESTIMATES/>).
 4 June 2007

Per Capita Nominal BPOL Tax Revenue Increased in 2006



Per Capita Nominal Business License Tax Revenue in Albemarle County

Changes in the per-capita value of BPOL tax revenue gives a rough idea about the *intensity* of business activity in a community. The higher the value of BPOL revenue per resident, the higher the level of business activity that each resident "supports". In the case of Albemarle, this activity increased by roughly 35.4% between 1996 and 2001 and increased by 27.9% in 2006 from 2003.

Attachment T – Deposits in Commercial Banks

| Albemarle County Bank Deposits | | | | | |
|---|---------------|-------------|---------------|-----------------------|-------|
| Fiscal Year | Bank Deposits | Fiscal Year | Bank Deposits | Average Annual Growth | |
| 1994 | 355,399 | 2000 | 423,676 | 94-00 | 3.0% |
| 1995 | 357,490 | 2001 | 457,000 | | |
| 1996 | 354,604 | 2002 | 495,000 | | |
| 1997 | 377,117 | 2003 | 680,699 | | |
| 1998 | 365,453 | 2004 | 746,292 | | |
| 1999 | 417,626 | 2005 | 1,001,164 | 00-05 | 21.7% |
| (1,001,164-354,604) = .9877 / 10 years = 9.87% | | | | 94-05 | 9.87% |
| http://www.albemarle.org/upload/images/forms_center/departments/finance/forms/CAFR_2005.pdf | | | | | |

Attachment U – Building Value

| Year | New Residential | | New Non-Res & Alter. | | New Commercial & | | Farm Bldg. Alterations | |
|------|-----------------|-------------|----------------------|------------|------------------|-------------|------------------------|------------|
| | No. | Amt. (\$) | No. | Amt. (\$) | No. | Amt. (\$) | No. | Amt. (\$) |
| 1990 | 665 | 61,802,696 | 921 | 15,342,542 | 26 | 7,910,736 | 255 | 11,869,356 |
| 1991 | 589 | 51,285,672 | 803 | 11,090,518 | 46 | 13,458,797 | 224 | 22,386,373 |
| 1992 | 739 | 78,810,454 | 807 | 20,146,386 | 55 | 14,067,365 | 272 | 11,376,911 |
| 1993 | 717 | 68,855,330 | 874 | 15,562,513 | 57 | 16,327,783 | 153 | 10,565,021 |
| 1994 | 666 | 87,244,515 | 865 | 17,700,080 | 47 | 14,017,368 | 216 | 17,311,228 |
| 1995 | 596 | 75,679,003 | 820 | 18,421,103 | 62 | 19,597,733 | 235 | 10,042,333 |
| 1996 | 620 | 88,409,350 | 771 | 12,677,441 | 68 | 14,794,996 | 205 | 17,089,126 |
| 1997 | 707 | 101,181,621 | 838 | 17,886,461 | 70 | 86,368,593 | 304 | 16,157,948 |
| 1998 | 704 | 113,548,623 | 883 | 21,082,938 | 78 | 39,265,010 | 318 | 33,339,817 |
| 1999 | 767 | 135,497,848 | 957 | 24,668,820 | 74 | 25,639,523 | 341 | 18,940,639 |
| 2000 | 649 | 115,980,335 | 870 | 30,553,776 | 79 | 36,701,250 | 306 | 21,051,626 |
| 2001 | 595 | 121,581,817 | 722 | 26,771,198 | 72 | 120,723,577 | 173 | 11,256,192 |
| 2002 | 840 | 219,612,245 | 810 | 32,666,405 | 62 | 32,161,180 | 206 | 20,801,458 |
| 2003 | 688 | 143,158,647 | 804 | 47,849,191 | 60 | 13,405,691 | 324 | 18,846,760 |
| 2004 | 581 | 146,326,941 | 745 | 29,461,560 | 52 | 222,397,227 | 298 | 10,780,837 |
| 2005 | 734 | 215,841,361 | 985 | 42,137,027 | 89 | 34,793,179 | 477 | 42,663,330 |
| 2006 | 513 | 175,167,104 | 987 | 45,203,383 | 55 | 57,977,153 | 346 | 27,532,859 |

| 17-Year Averages | | | | | | | | |
|------------------|-----|-------------|-----|------------|----|------------|-----|------------|
| average | 669 | 117,646,092 | 851 | 25,248,314 | 62 | 45,271,009 | 274 | 18,941,871 |
| median | 666 | 113,548,623 | 838 | 21,082,938 | 62 | 25,639,523 | 272 | 17,311,228 |

Source: Albemarle County Year-End Building Reports

Attachment V – Land in Farms, Net Worth

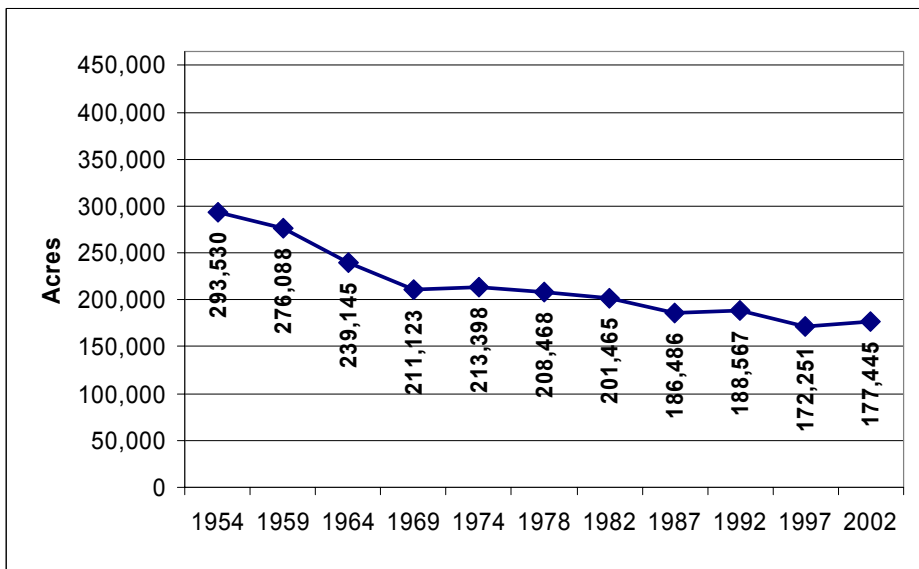
| Year | Number of Farms | Land in Farms (acres) | Total Value of Ag Products Sold | Total Value of Livestock, Poultry and Their Products Sold | Net Worth/Farm |
|------|-----------------|-----------------------|---------------------------------|---|----------------|
| 1974 | 750 | 213,398 | \$10,376,000 | \$7,394,000 | \$13,835 |
| 1978 | 751 | 208,476 | \$18,173,000 | \$15,032,000 | \$24,198 |
| 1982 | 830 | 201,465 | \$21,892,000 | \$17,173,000 | \$26,376 |
| 1987 | 772 | 186,486 | \$19,072,000 | \$14,235,000 | \$24,705 |
| 1992 | 757 | 188,567 | \$21,841,000 | \$16,411,000 | \$28,852 |
| 1997 | 747 | 172,251 | \$21,400,000 | \$16,800,000 | \$28,648 |
| 2002 | 919 | 177,445 | \$19,100,000 | \$12,400,000 | \$20,783 |

Source: Census of Agriculture, Albemarle County

| Farms by Value of Sales | Quantity |
|------------------------------------|---------------|
| Less than \$1,000 | 283 |
| \$1,000-\$2,400 | 152 |
| \$2,500-\$4,999 | 142 |
| \$5,000-\$9,999 | 115 |
| \$10,000-\$19,999 | 87 |
| \$20,000-\$24,999 | 22 |
| \$25,000-\$39,999 | 38 |
| \$40,000-\$49,999 | 17 |
| \$50,000-\$99,999 | 33 |
| \$100,000-\$249,999 | 19 |
| \$250,000-\$499,999 | 3 |
| \$500,000 or more | 8 |
| Total Farm production expenses | \$24,724,000 |
| Average per farm (\$) | \$26,962 |
| Net cash farm income of operations | (\$1,839,000) |
| Average per farm (\$) | (\$2,006) |
| State Rank (total value) | 35th |

Source: 2002 Census of Agriculture

Land in Farms in Albemarle County, 1954-2002



W – Agricultural Statistics

Virginia Agricultural Statistics Service:

2002, Number 79, (published 9/2003)

Albemarle County standings...

Farms 8th in acres, 15th in number of farms

Ag products sold 35th

Ag products sold – livestock, poultry and their products 30th

Orchards 4th acres, 2nd farms

Apples 6th in bushels

Peaches (9 farms, acreage not specified) 14th in number of farms

All Hay 18th

Sheep 9th

Milk Goats 5th of 81 in number of farms

Angora Goats 3rd of 54 in number of farms, 1st in mohair production

Bees and Honey 13 (tied with 2 others) of 82 in number of farms, 42 of 46 in pounds of honey produced

Certified Organically Produced Commodities 7 farms in 2002 from 0 farms in 1997, 17th (tied with 4 other counties)
out of 72 counties with Certified Organically Produced Commodities farms

Virginia Agricultural Statistics Service:

2001 Virginia Equine Survey (published 12/02)

1st in inventory

VA dept of Agriculture and Consumer Services

2003 Grape Production

1st in tons produced and in bearing acres

Dept of Forestry

AVERAGE ANNUAL HARVEST VALUE (1986-2001)

Albemarle ranks 11th with \$4,960,986

Attachment X – Land Use, Albemarle County

| Buildable Vacant Acres by Growth Area, 1993 | | | | | | | | | | | |
|---|-------------|-------------|------------|------------|-----------|------------|------------|-----------|-------------|------------|-------------|
| Growth Area | VR | LD | MD | HD | NS | CS | RS | OS | IS | ORS | Total |
| Neighborhood 1 | 0 | 0 | 41 | 30 | 0 | 12 | 49 | 0 | 30 | 0 | 162 |
| Neighborhood 2 | 0 | 600 | 75 | 25 | 4 | 45 | 0 | 14 | 0 | 0 | 763 |
| Neighborhood 3 | 0 | 398 | 78 | 90 | 7 | 20 | 56 | 0 | 0 | 236 | 885 |
| Neighborhood 4 | 0 | 719 | 36 | 42 | 0 | 0 | 0 | 0 | 225 | 0 | 1022 |
| Neighborhood 5 | 0 | 307 | 37 | 103 | 12 | 10 | 40 | 2 | 0 | 0 | 511 |
| Neighborhood 6 | 0 | 449 | 0 | 0 | 3 | 0 | 0 | 5 | 0 | 0 | 457 |
| Neighborhood 7 | 0 | 122 | 0 | 38 | 0 | 0 | 0 | 4 | 0 | 0 | 164 |
| Hollymead | 0 | 190 | 0 | 127 | 10 | 30 | 77 | 65 | 709 | 0 | 1208 |
| Crozet | 0 | 640 | 154 | 0 | 12 | 15 | 0 | 0 | 214 | 0 | 1035 |
| Piney Mountain | 0 | 5 | 20 | 0 | 0 | 0 | 0 | 0 | 203 | 0 | 228 |
| Rivanna | 897 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 897 |
| Earlysville | 246 | 0 | 0 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 251 |
| North Garden | 972 | 0 | 0 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 977 |
| TOTAL | 2115 | 3430 | 441 | 455 | 58 | 132 | 222 | 90 | 1381 | 236 | 8560 |

Source: Albemarle County Department of Planning and Community Development, 1993, using a planimeter

Legend VR - Village Residential CS - Community Service
 LD - Low Density RS - Regional Service
 MD - Medium Density OS - Office Service
 HD - High Density IS - Industrial Service
 NS - Neighborhood ORS - Office/Regional Service

| Buildable Vacant Acres by Growth Area, 2005 | | | | | | | | | | | | |
|---|---------------|---------------|---------------|-----------------|--------------|--------------|---------------|---------------|-------------|--------------|---------------|-----------------|
| Growth Area | CS | IS | I | ND | NS | OS | O/RS | RS | TC | T | UD | Total |
| Neighborhood 1 | 16.38 | 0.00 | 5.39 | 2.64 | 0.00 | 2.96 | 0.00 | 35.60 | 0.00 | 36.89 | 79.12 | 178.98 |
| Neighborhood 2 | 35.82 | 0.00 | 10.22 | 338.14 | 2.41 | 7.36 | 0.00 | 3.24 | 0.00 | 0.00 | 127.45 | 524.64 |
| Neighborhood 3 | 7.34 | 0.00 | 0.00 | 250.87 | 2.80 | 0.00 | 159.61 | 33.35 | 0.00 | 0.00 | 75.14 | 529.11 |
| Neighborhood 4 | 49.19 | 31.79 | 33.50 | 207.06 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 9.43 | 93.34 | 424.31 |
| Neighborhood 5 | 18.68 | 0.00 | 0.00 | 135.62 | 0.00 | 3.54 | 0.00 | 41.72 | 0.00 | 0.00 | 95.70 | 295.26 |
| Neighborhood 6 | 1.55 | 0.00 | 64.99 | 277.73 | 7.69 | 12.09 | 0.00 | 0.00 | 0.00 | 0.00 | 4.11 | 368.16 |
| Neighborhood 7 | 0.00 | 0.00 | 6.13 | 9.40 | 0.00 | 6.16 | 0.00 | 0.00 | 0.00 | 0.00 | 48.88 | 70.57 |
| Hollymead | 11.29 | 697.97 | 33.23 | 780.88 | 1.01 | 11.49 | 0.00 | 0.00 | 8.05 | 13.61 | 159.38 | 1,716.91 |
| Piney Mountain | 0.00 | 202.87 | 0.00 | 81.59 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 284.46 |
| Rivanna Village | 64.53 | 0.00 | 0.00 | 356.98 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 421.51 |
| Total | 204.78 | 932.63 | 153.46 | 2,440.91 | 13.91 | 43.60 | 159.61 | 113.91 | 8.05 | 59.93 | 683.12 | 4,813.91 |

| Growth Area | D | PFED | CT3 | CT4 | CT5 | CT6 | Total |
|-------------|------|------|--------|--------|-------|------|--------|
| Crozet | 3.37 | 0.00 | 303.67 | 151.44 | 55.47 | 9.60 | 523.55 |

Source: Albemarle Department of Community Development, 2007

Note: The figures listed above do not include land which is in the floodplain (100 Yr.) or has a slope of 25% or greater. All acreages are based on GIS polygon acreage - not actual deeded acreage.

All parcels queried for this analysis have a building/improvement value of \$20,000 or less.

This query was based on end of year 2005 parcel and CAMA data.

CS - Community Service D - District
 IS - Industrial Service PFED - Potential Future Employment District
 I - Institutional CT3 - Urban Edge [CT3]
 ND - Neighborhood Density CT4 - Urban General [CT4]
 NS - Neighborhood Service CT5 - Urban Center [CT5]
 OS - Office Service CT6 - Urban Core [CT6]
 O/RS - Office/Regional Service
 RS - Regional Service
 TC - Town Center
 T - Transitional
 UD - Urban Density

Analysis of Vacant Land Zoned LI

Albemarle County Acreage for Light Industry Activity

| Area | Total IS | Total LI | Both IS & LI | Vacant IS | Vacant LI | Vacant IS & LI |
|---------------------|-----------------|-----------------|-------------------------|------------------|------------------|---------------------------|
| Places 29 | 1,234 | 305 | 266 | 901 | 93 | 88 |
| Crozet | 37 | 124 | 17 | 4 | 64 | 3 |
| Remaining County | 211 | 599 | 128 | 31 | 176 | 20 |
| Total County | 1,481 | 1,027 | 411 | 935 | 333 | 111 |

1. IS = Industrial Service in the Comprehensive Plan, LI = Light industrial zoning
2. Acreage totals are based on GIS-mapped polygons
3. Any acres in the 100-year flood plain covered were subtracted out and are reflected in these totals
4. "Undeveloped" refers to building improvements values listed in CAMA greater than or equal to zero and less than or equal to \$20,000

End of year 2005 CAMA data was used for this analysis, compiled by GDS

CITIZEN SATISFACTION SURVEY

Table 3-14: Importance and Satisfaction with Services

| Importance | | Service | Satisfaction | |
|------------|------|--|--------------|------|
| Score | Rank | | % | Rank |
| 2.96 | 1 | Provide quality education for school children | 88.0 | 14 |
| 2.94 | 2 | Provide emergency rescue services | 96.8 | 1 |
| 2.94 | 3 | Provide fire protection | 95.4 | 2 |
| 2.92 | 4 | Protect water resources | 79.4 | 17 |
| 2.91 | 5 | Provide police protection (service) | 91.4 | 9 |
| 2.88 | 6 | Provide effective service to our customers | 90.2 | 11 |
| 2.87 | 7 | Provide needed public facilities | 92.5 | 7 |
| 2.86 | 8 | Providing fair property tax assessments | 70.2 | 25 |
| 2.84 | 9 | Maintain quality of life dealing with growth and development | 73.4 | 23 |
| 2.83 | 10 | Providing opportunities for citizen input | 81.3 | 16 |
| 2.80 | 11 | Provide needed infrastructure | 75.9 | 21 |
| 2.80 | 12 | Ensure safety in business area | 89.6 | 13 |
| 2.79 | 13 | Protect natural resources and environment | 78.3 | 18 |
| 2.74 | 14 | Support youth programs | 78.1 | 19 |
| 2.74 | 15 | Manage growth in the county | 55.6 | 32 |
| 2.73 | 16 | Ensure safety at or near residence | 94.7 | 3 |
| 2.73 | 17 | Provide programs to help elderly population | 85.0 | 15 |
| 2.73 | 18 | Provide library services | 93.8 | 4 |
| 2.72 | 19 | Protect county’s rural character | 65.7 | 28 |
| 2.71 | 20 | Provide services to disadvantaged people | 75.1 | 22 |
| 2.68 | 21 | Make it easy to get around by car | 71.0 | 24 |
| 2.68 | 22 | Provide recycling services | 56.6 | 31 |
| 2.65 | 23 | Provide parks and recreation space | 90.4 | 10 |
| 2.62 | 24 | Ensure safety for walkers and bicyclists | 68.0 | 27 |
| 2.58 | 25 | Promote development of affordable housing | 58.7 | 30 |
| 2.55 | 26 | Assure economic growth and job opportunities | 76.8 | 20 |
| 2.51 | 27 | Provide support for people in financial need | 69.7 | 26 |
| 2.50 | 28 | Make it easy to use public transportation | 55.2 | 33 |
| 2.48 | 29 | Preserve historic buildings and places | 93.5 | 5 |
| 2.48 | 30 | Provide learning opportunities for adults | 89.7 | 12 |
| 2.48 | 31 | Support affordable child care | 65.4 | 29 |
| 2.28 | 32 | Support cultural and entertainment opportunities | 91.7 | 8 |
| 2.22 | 33 | Promote tourism in our area | 92.7 | 6 |

Albemarle County has a strong economy. We have a growing population and labor force and have experienced low unemployment rates. The labor force is skilled and well-educated. Good schools, good planning, and our quality of life are important factors in the County's current economic position. Median incomes are higher than at the State and regional levels. A consistently strong employer is present in the University of Virginia, which, as a major university and medical center, offers great potential for associated research and development industry. Other major employers and sectors continue to provide employment stability and diversity. The renowned natural environment, Blue Ridge Mountain location, and historic resources of the area provide a growing tourist trade as well as an attractive place to do business. The rural and agrarian heritage contributes to this character, and also offers opportunity for agricultural and forestry industries. These are the strengths of Albemarle County which this economic development policy recognizes, and will seek to maintain.

We are like other university communities in that we have an above-average labor force participation rate and above-average number of part-time workers (both students and adults who prefer part-time work). As a university community, we have a somewhat captive labor force as well as people who live here for quality of life reasons, knowing that wages would be higher in the more urban parts of the state. We are a growing community with rising property values, and a large share of our housing stock is new and priced accordingly. The high demand for both new and used housing and the desirability of the community produce well above average housing costs relative to wages paid by many employers. As we fine tune our community, we seek to maintain a diversity of employment opportunities and to find ways to add housing for the lower half of the incomes in our community. We also have lower-income residents who are unable to work regularly, or who work for minimum wage. Possible increases in the minimum wage nationally would benefit those who continue to work in the minimum wage positions. Local efforts to enhance skills and to develop the work force may also provide ways to move individuals out of minimum wage jobs.

The purpose of this economic development policy is, first and foremost, to provide the local citizenry an improved standard of living, improved job opportunities and competitive wages, and work force development opportunities, rather than to seek to stimulate further population growth. We do not seek growth, or to add new population, but accept that more people will move to our community and that jobs, goods, and services will be needed to meet their needs. Accordingly, planning will designate sites to address future growth needs in ways that will not detract from, but will add to, the strengths of our community. We will provide information about those sites to those who request it and attempt to answer all questions promptly and directly. We recognize our position, along with the City of Charlottesville, as the center of the regional economy. We recognize the economic objectives of the other localities in the region, while renewing our commitment to our own economic development within the overall framework of our growth management objectives. Albemarle County supports the Community Vision Statement regarding economic development.