

Market & Demographic Analysis

An analysis of the City of Bristol's demographic and market conditions was conducted to better inform the planning process and provide the necessary background information for developing market-viable recommendations.

This analysis presents and assesses current trends, notes important market implications, and assesses potential for future growth and development opportunities. Where applicable, Bristol is compared with the greater Kingsport-Bristol-Bristol, TN-VA Metropolitan Statistical Area (MSA). Collectively, this information provides a snapshot of the city's current and future competitive position within the region.

Demographics

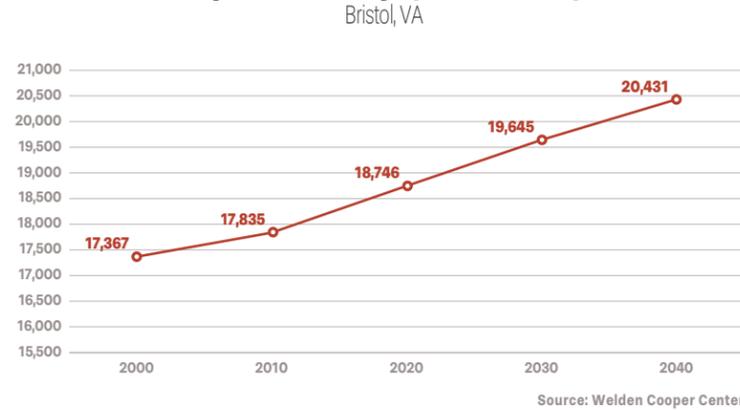
This section provides an overview of key demographic factors within Bristol, such as population, age, income, race, and ethnicity. All data was obtained from ESRI Business Analyst and the U.S. Census Bureau.

Population

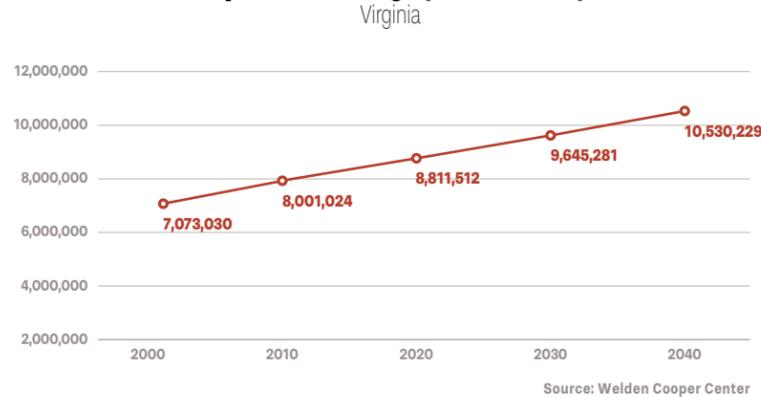
Bristol's population has remained relatively stable although it has increased slightly over the past several years, a trend that is projected to continue through 2040. Virginia is growing as well, however, at a faster rate.

As a side note, The Weldon Cooper Center for Public Service at the University of Virginia also forecasts population for cities throughout Virginia.

Population Change (2000 - 2040)



Population Change (2000-2040)



Demographic Summary (2000-2040)

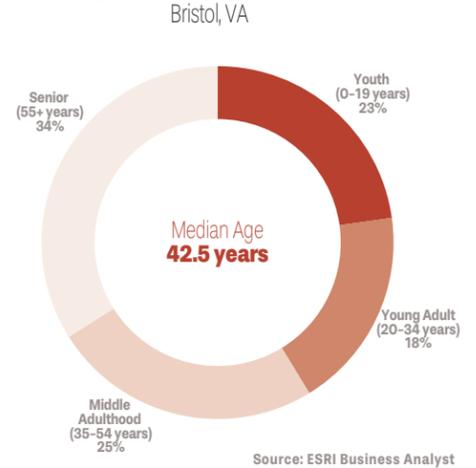
	2000	2010	2020	2030	2040	Projected Change (2010-2040)	
Bristol, VA							
Population	17,367	17,835	18,746	19,645	20,431	+3,064	+17.6%
Virginia							
Population	7,079,030	8,001,024	8,811,512	9,645,281	10,530,229	+3,451,199	+48.8%

Source: ESRI Business Analyst; Weldon Cooper Center; Houseal Lavigne Associates

Age

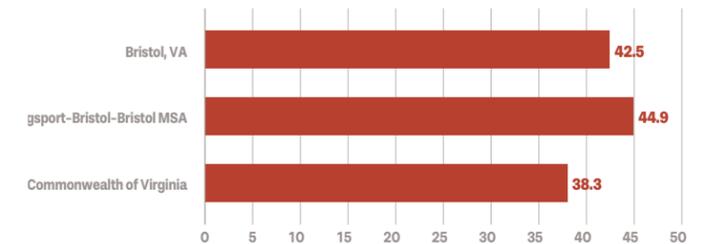
The distribution of population among age cohorts is relatively the same in both the City and MSA. While both the City and region are getting older, the City's median age of 42.5 is approximately 2 1/2 years lower than that of the MSA (44.9). Currently more than 20% of the population in both areas is over 65.

Age Distribution (2015)



Median Age (2015)

Bristol, VA, Kingsport-Bristol-Bristol MSA & Commonwealth of Virginia



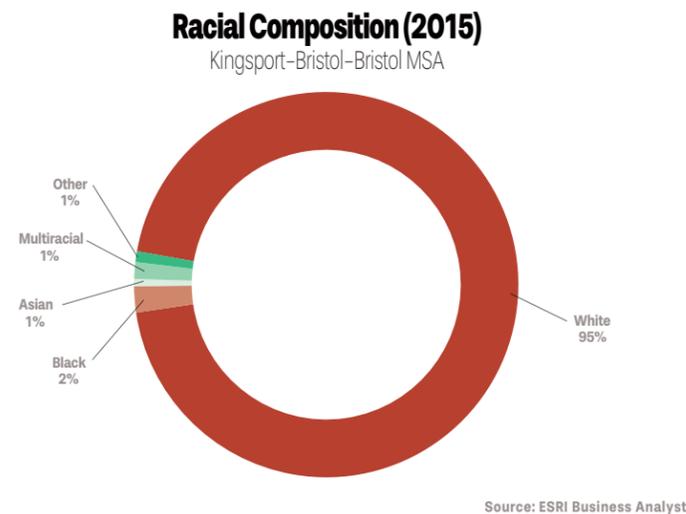
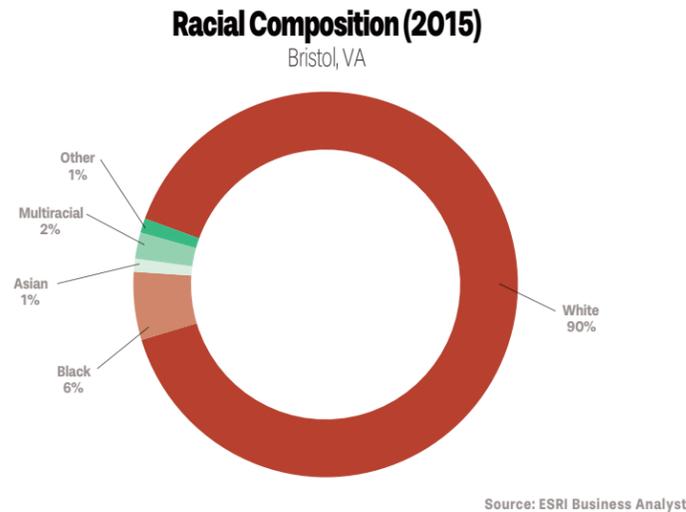
Source: ESRI Business Analyst

Race & Ethnicity

Bristol is a primarily white community (as defined by the U.S. Census). However, the City's white population is slightly lower than that of the region (90% versus 95%).

Projections indicate that the racial composition of Bristol will remain relatively unchanged between 2015 and 2020, consistent with projected trends for the region. Both the City and MSA are expected to see slight increases in the Hispanic population.

NOTE: The racial and ethnic categories discussed here are defined by the U.S. Census. For the U.S. Census definition, those individuals who identify themselves as "Hispanic" (which is an ethnicity) also identify with a racial category such as "White" or "Black" As such, the Hispanic category cannot be added to the sum of the racial categories.

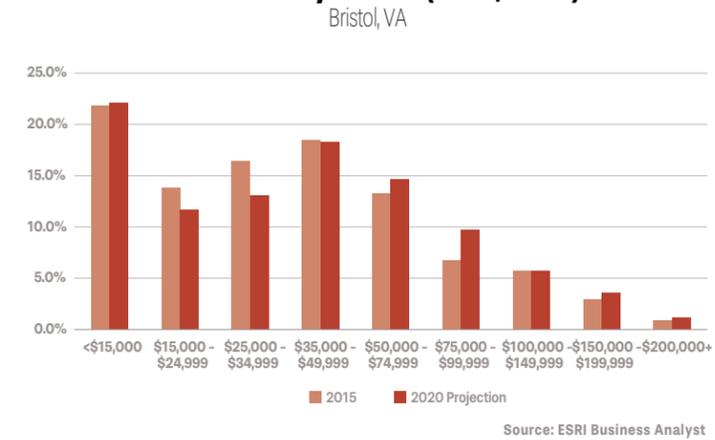


Income

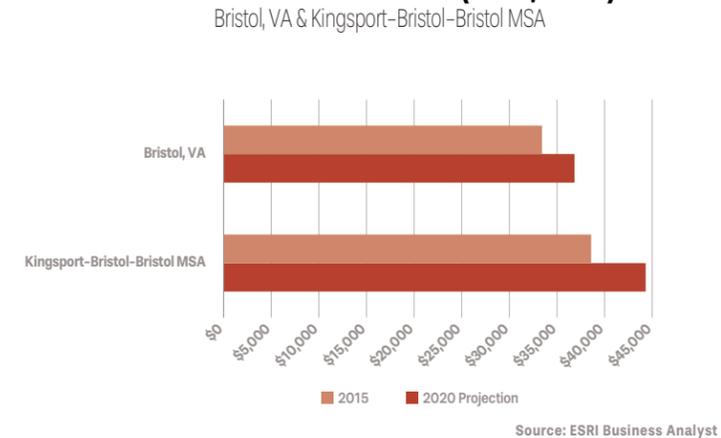
The City's median household income for 2015 is \$33,430, which is approximately 13% lower than that of the MSA median of \$38,584. The gap between City and regional median household incomes is expected to increase to 17% between 2015 and 2020.

Projections indicate that income cohorts earning greater than \$50,000 will increase in share of the population between 2015 and 2020, while income cohorts earning less than \$50,000 will decrease in share. Household incomes between \$25,000 to \$34,999 will see the largest decrease in share while incomes between \$75,000 - \$99,999 will see the largest growth.

Households by Income (2015, 2020)



Median Household Income (2015, 2020)



Market Implications

Overall, the population of the City of Bristol and the region has been relatively stable and is projected to continue to remain relatively unchanged. The City is aging and household incomes are increasing. Future residential and commercial development, as well as city services and recreational options, will need to accommodate and address the needs of a senior and aging-in-place population. Increases in household incomes will serve to provide the market support for new investment.

Housing

Total Units

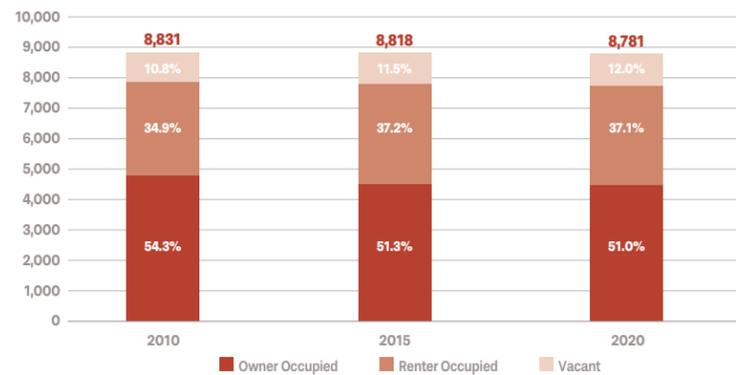
In 2015 the City of Bristol contained 8,818 housing units, including 475 vacant dwellings. The vacancy rate, at 11.5% in 2015, is projected to remain relatively stable though it is projected to increase slightly. The actual total number of housing units in Bristol is projected to decrease by about 50 units over the next several years through a combination of lot consolidation and demolition of older housing units.

Value

The median home value in 2015 of a home in Bristol is \$106,751. It is projected to increase to \$115,829 by 2020. This is lower than the estimated median value of the MSA, which is \$141,279 (2015) and \$185,575 (2020).

Total Housing Units (2010, 2015, 2020)

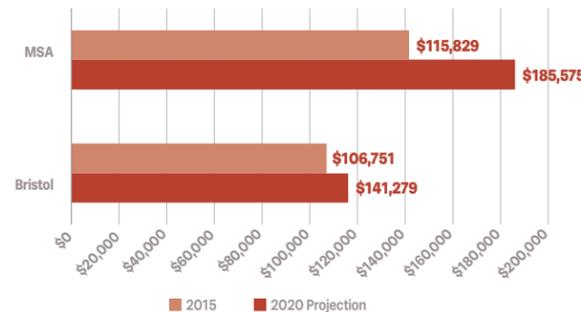
Bristol, VA



Source: ESRI Business Analyst

Housing Value (2015, 2020)

Bristol, VA & Kingsport-Bristol-Bristol MSA



Source: ESRI Business Analyst

Type & Tenure

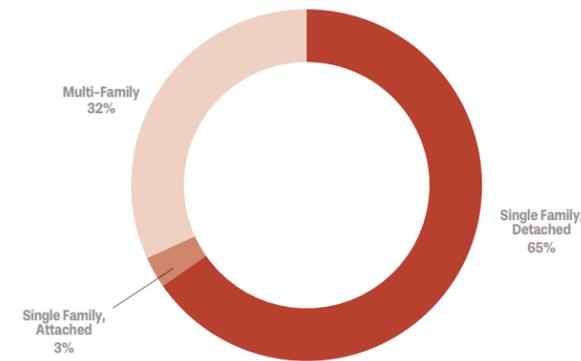
The typical housing unit in Bristol is an owner-occupied, single family detached home. Roughly half of the homes in Bristol are owner-occupied. Single family detached homes account for about two-thirds of the housing stock with multi-family approximately one-third. There are very few attached single-family (townhomes/rowhomes) units in the City.

Age of Housing Stock

More than half of the City's housing stock was built prior to 1970. New construction decreased further in recent years as result of regional and national economic conditions with less than 8% of the housing supply having been built since 2000.

Housing by Tenure (2015)

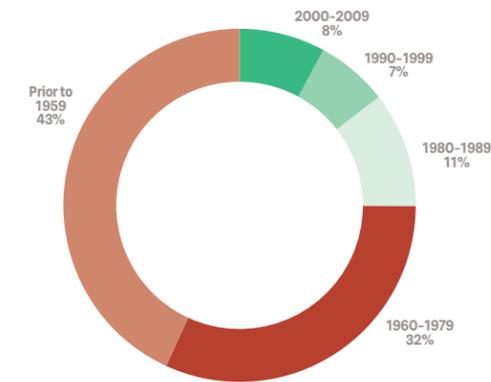
Bristol, VA



Source: 2009-2013 5-Year American Community Survey

Housing Age (<1950-2013)

Bristol, VA



Source: 2009-2013 5-Year American Community Survey



Market Implications

The City is in need of greater diversity in the housing stock. In addition to the fact that there are few newly constructed units, there is a need for move up housing and quality age targeted product geared for empty-nesters and seniors as well as young professionals. Reinvestment in the housing market can help to attract young people and families as well as providing the opportunity for older residents to downsize and age-in-place without having to leave Bristol. This, in turn, opens up opportunities for young families to purchase those same homes.

Employment

Total Employment

The City of Bristol experienced a marked decline in employment between 2009 and 2013. This was, however, not unique to Bristol as the nation experienced a significant recession. While retail, manufacturing, and accommodation and food services continue to be amongst the top employment categories in Bristol, they also experienced the greatest job losses during that period. Transportation and Warehousing, while not as large of a provider of jobs, also experienced a significant reduction.

Primary Jobs by Industry (2009-2013)

Bristol, VA

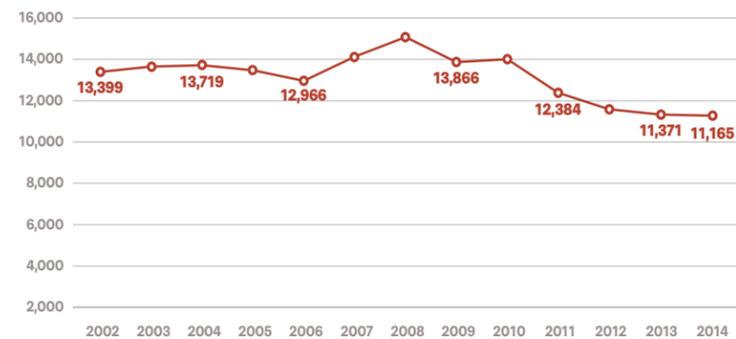
	2009		2010		2011		2012		2013	
	Count	Share								
Total Primary Jobs	13,866	100.0%	14,013	100.0%	12,384	100.0%	11,602	100.0%	11,371	100.0%
Agriculture, Forestry, Fishing and Hunting	47	0.3%	47	0.3%	49	0.4%	50	0.4%	51	0.4%
Mining, Quarrying, and Oil and Gas Extraction	27	0.2%	11	0.1%	11	0.1%	23	0.2%	13	0.1%
Utilities	10	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Construction	302	2.2%	333	2.4%	232	1.9%	344	3.0%	325	2.9%
Manufacturing	2178	15.7%	2000	14.3%	1875	15.1%	1,673	14.4%	1,706	15.0%
Wholesale Trade	950	6.9%	903	6.4%	873	7.0%	861	7.4%	855	7.5%
Retail Trade	2278	16.4%	2239	16.0%	1922	15.5%	1,678	14.5%	1,881	16.5%
Transportation and Warehousing	84	0.6%	451	3.2%	95	0.8%	331	2.9%	298	2.6%
Information	390	2.8%	355	2.5%	330	2.7%	330	2.8%	335	2.9%
Finance and Insurance	378	2.7%	372	2.7%	332	2.7%	297	2.6%	346	3.0%
Real Estate and Rental and Leasing	95	0.7%	108	0.8%	47	0.4%	37	0.3%	46	0.4%
Professional, Scientific, and Technical Services	302	2.2%	167	1.2%	176	1.4%	251	2.2%	266	2.3%
Management of Companies and Enterprises	142	1.0%	115	0.8%	106	0.9%	133	1.1%	132	1.2%
Administration, Waste Management and Remediation	1756	12.7%	1820	13.0%	1577	12.7%	1,424	12.3%	248	2.2%
Educational Services	911	6.6%	745	5.3%	790	6.4%	550	4.7%	676	5.9%
Health Care and Social Assistance	621	4.5%	692	4.9%	831	6.7%	852	7.3%	819	7.2%
Arts, Entertainment, and Recreation	68	0.5%	65	0.5%	59	0.5%	51	0.4%	63	0.6%
Accommodation and Food Services	2357	17.0%	2309	16.5%	1900	15.3%	1,845	15.9%	2,125	18.7%
Other Services (excluding Public Administration)	451	3.3%	428	3.1%	367	3.0%	413	3.6%	374	3.3%
Public Administration	519	3.7%	853	6.1%	812	6.6%	459	4.0%	812	7.1%

This table depicts total primary employment within the City of Bristol, VA. A "primary job" is defined as the one job during the reference period that provides each person with the most earnings. If a person holds one job, that is their primary job. If a person holds two or more jobs, then the one with the most earnings is defined as the primary job.

Source: U.S. Census "On the Map"; Houseal Lavigne Associates

Total Primary Jobs (2002-2014)

Bristol, VA



Source: U.S. Census Bureau, Center for Economic Studies

The State of Virginia estimates future employment levels, including the number of jobs within each industry. Bristol is located within the New River/Mt. Rogers Local Workforce Investment Area. Within the area the three industries projected to see the greatest increase in jobs between

2012 and 2022 are: Professional Scientific and Technical Services; Construction; and Health Care and Social Assistance. While these are areas of growth within the region, they do not necessarily match directly with growth and employment in Bristol.

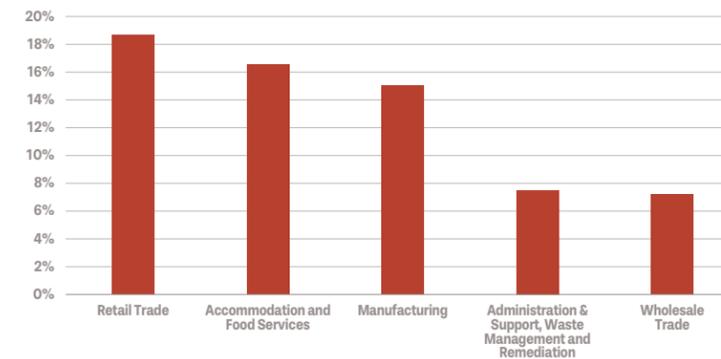
Commute & Labor Shed

Commute and labor sheds demonstrate where employees are commuting to and from in relation to Bristol. The commute shed shows where employed residents who live within Bristol commute to for work. The labor shed shows where individuals employed within Bristol travel from to fill those jobs.

Most jobs in Bristol are held by individuals from outside of the City. Equally, most Bristol residents travel to other locations for work. Only a small percentage of residents both worked and lived in Bristol. This dynamic is, however, fairly typical of a City of Bristol's size and location. It is a function of Bristol employers' access to a large regional labor pool and resident's access to a diverse selection of jobs in other locations.

Top Five Industries (2013)

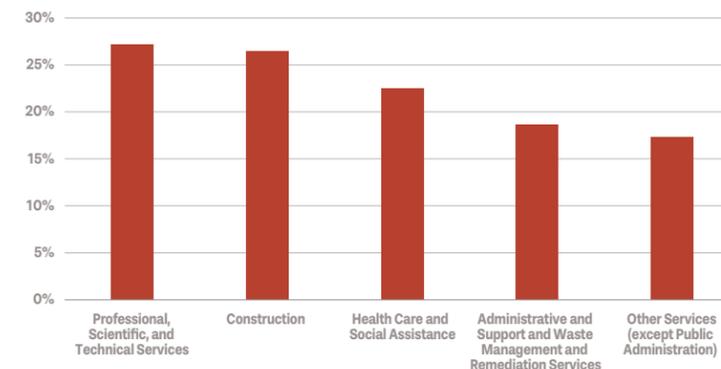
Jobs Located in Bristol, VA



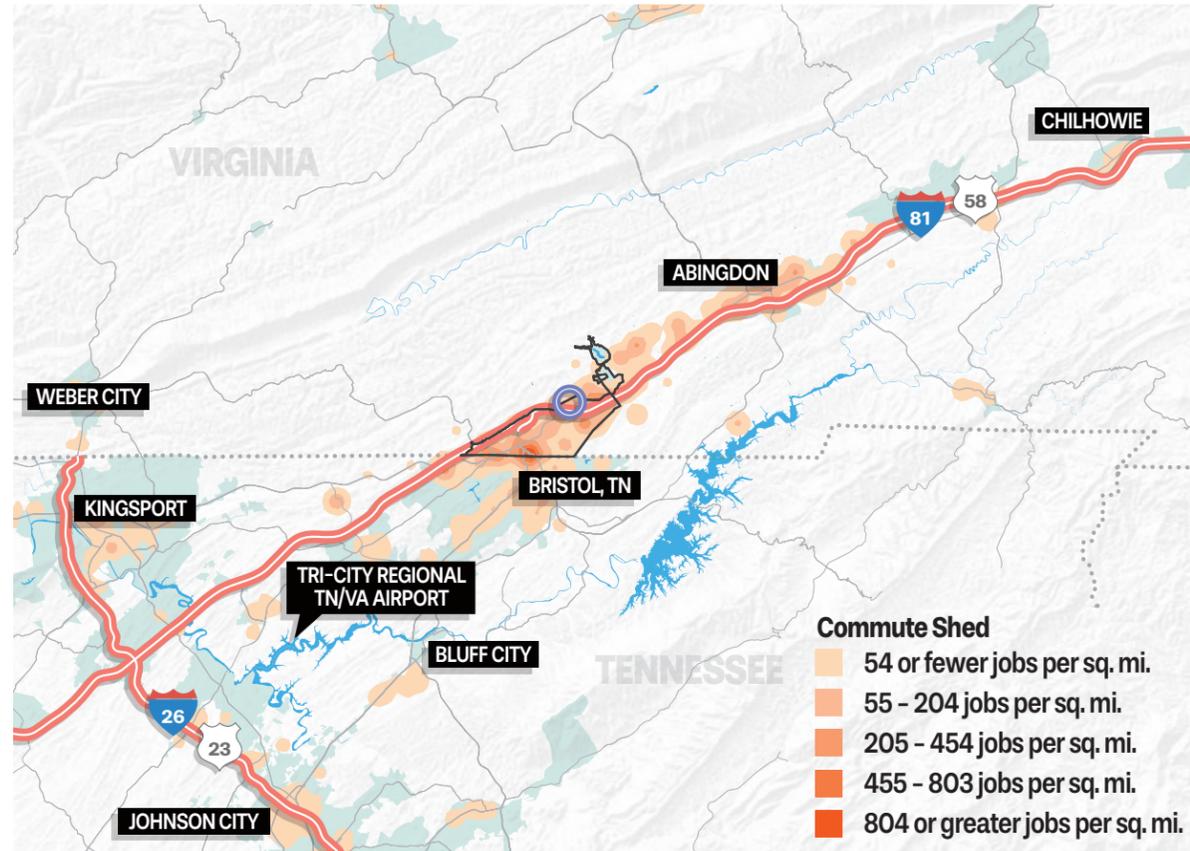
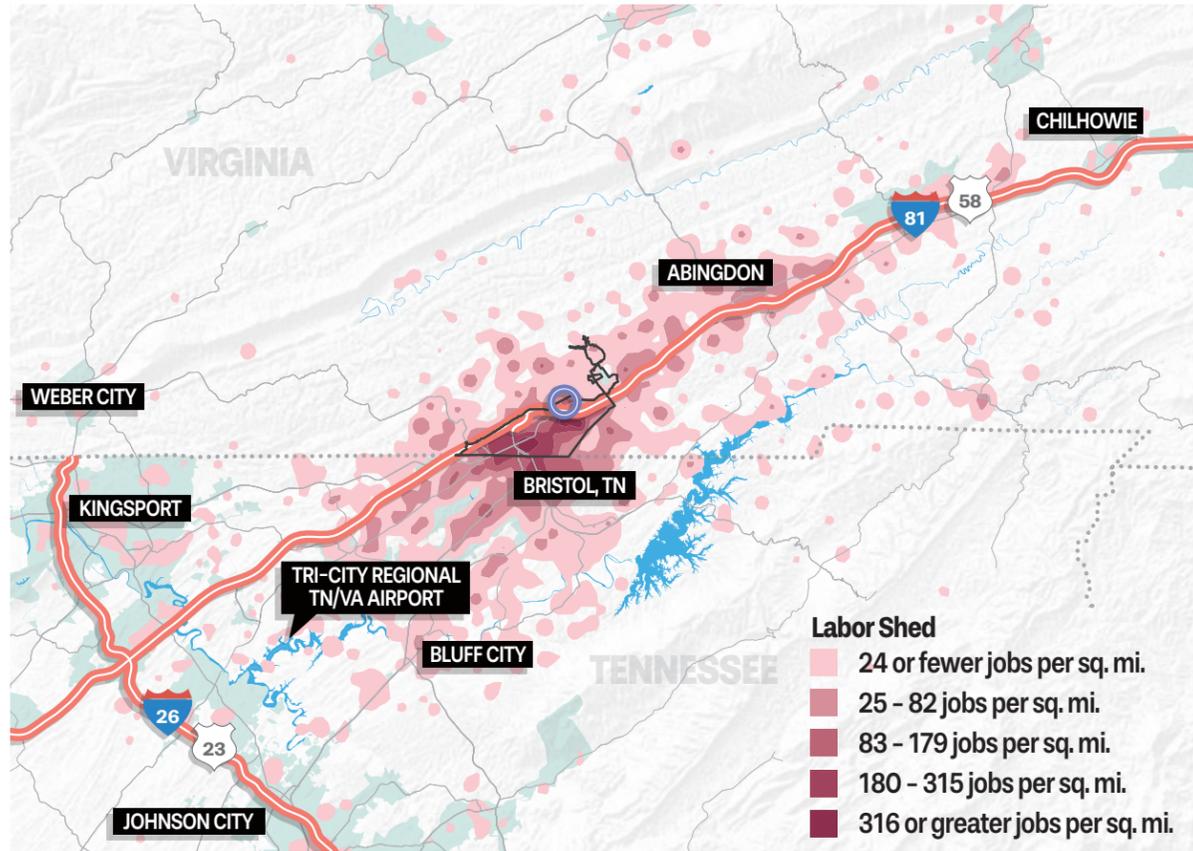
Source: U.S. Census Bureau, Center for Economic Studies

Top Five Growth Industries (2012-2022)

New River/Mt. Rogers (LWIA II)



Source: Virginia Employment Commission



Market Implications

While the region has regained some of the job loss that occurred during the downturn in the economy the City of Bristol should continue to take efforts to ensure that it is able to capture a proportionate share of growth and investment. Some of the categories in which job growth is projected are not being met within Bristol. Initiatives to attract new businesses and associated jobs are directly tied to residential and commercial growth as well. Business attraction/retention and economic development should be a key consideration in all future policy decisions.

Retail Market

This section overviews current market trends in Bristol and the region's retail markets. Unlike many cities of its size, Bristol, Virginia has multiple retail nodes that each function differently.

The City's iconic Downtown includes a mix of restaurants, niche retailers, cultural attractions and service uses that, together with the Bristol, Tennessee side of State Street, create a destination environment that attracts many visitors from outside the area as well as catering to local residents who patronize shops and restaurants on a daily basis.

Exit 5 and Exit 7 areas both have a regional pull that serve a very large market area. In addition, given their proximity to Interstate 81, these areas capture traffic passing through the area and overnight visitors utilizing the several hotel options. Like the Downtown however, the areas do also cater to the local resident population as well.

There are several other commercial corridors and retail nodes in the community that include a mix of convenience and neighborhood retail uses serving a more local market.

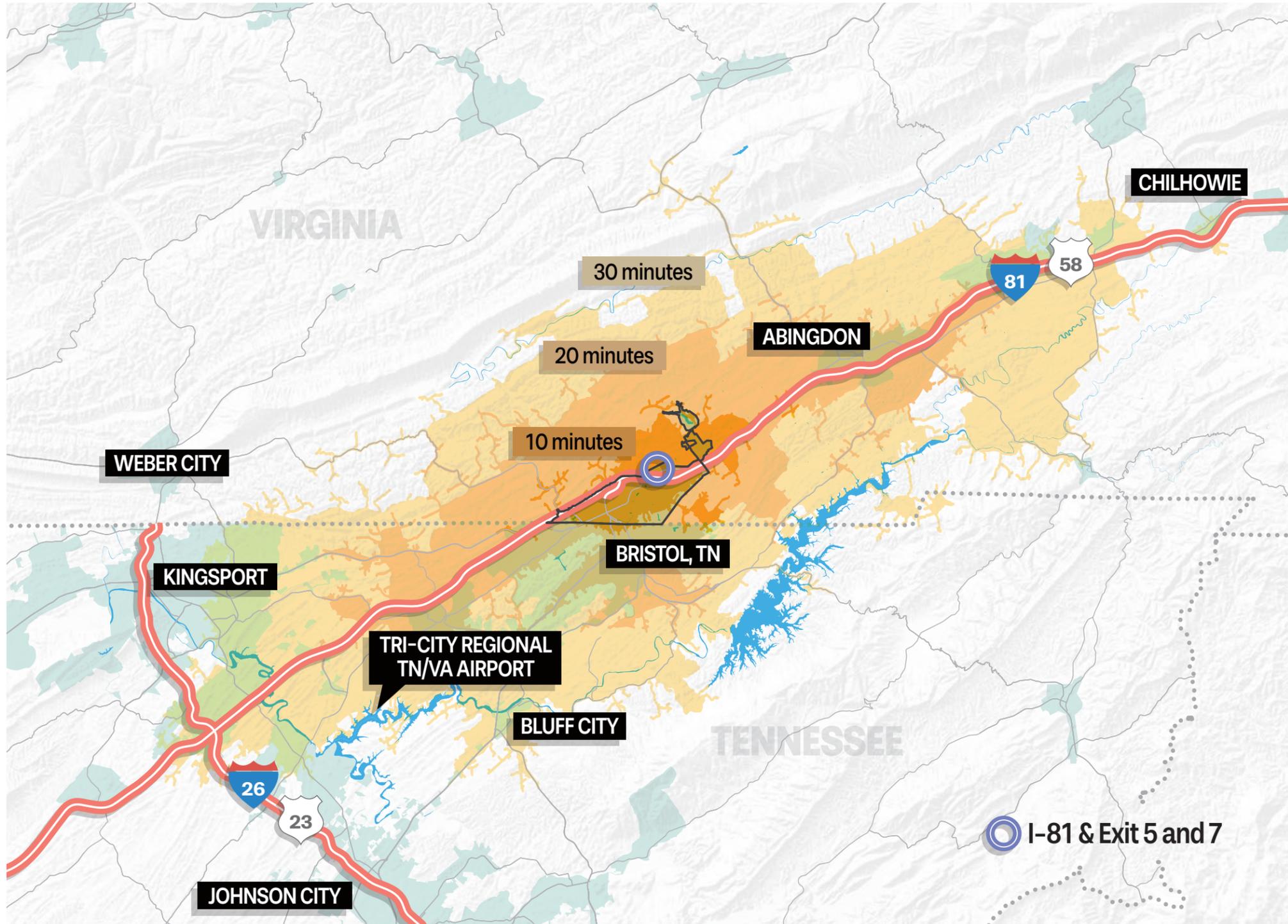
While all of these areas are located within Bristol, the respective market areas often extend well beyond City boundaries. In some cases, market areas can vary based on location and accessibility. In order to measure respective market potentials, a market area is defined for each. As consumers shop based on convenience and proximity, a drivetime best models consumer behavior as opposed to using mileage, geographic or jurisdictional boundaries. Consumers will generally travel relatively shorter distances for groceries and day-to-day-needs, but travel longer to purchase more durable items such as refrigerators, cars, or high-end clothing. In a location such as Bristol, consumers will generally travel 10 to 20 minutes for day-to-day needs such as groceries, but travel 20 minutes and further for more durable and less frequently purchased goods such as electronics.

Drivetimes of 10, 20 and 30 minutes were studied from two different points – The intersection of State and Commonwealth (Downtown) and Lee Highway between Interstate 81 Exit 5 and Exit 7. The intent of looking at these two locations separately was to see if the market potential varied. The only variance of note was that proximity to the Interstate expanded the market area somewhat, but otherwise overall market potential was fairly consistent. While the two locations identified are the nexus of each, the data can be applied to all locations within the City and the greater market area.

Retail Gap

The following "gap analysis" compares retail supply and demand within the defined market areas illustrated in the accompanying graphics. A gap analysis compares aggregate consumer spending (demand) to aggregate retail sales (supply) within a given retail category and drive time. When demand is greater than supply, "leakage" exists, suggesting that residents are spending dollars outside of the given market area. As such, retail categories with leakage are potential opportunities for growth, as local demand for these goods and services already exists, but is unmet by existing supply. Leakage is noted on the accompanying table as a positive number in green.





Retail Gap Analysis Summary (2015)

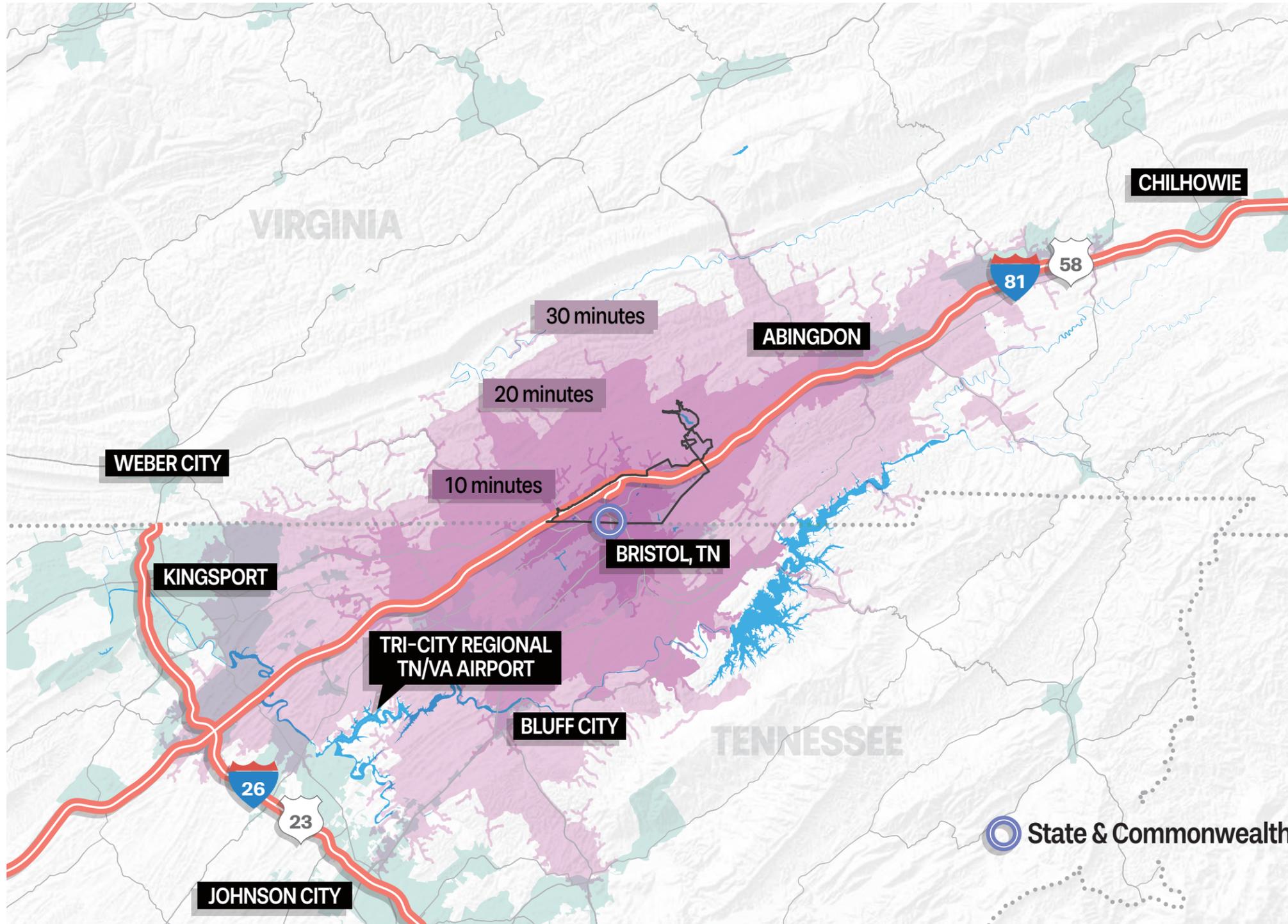
Bristol VA: I-81 & Exit 5 and 7

Summary Demographics	10 Minute Drivetime	20 Minute Drivetime	30 Minute Drivetime
Population	21,593	83,520	172,500
Households	9,572	35,855	72,822
Median Disposable Income	\$28,736	\$31,992	\$35,120
Per Capita Income	\$21,210	\$22,736	\$23,887

Overview	10 Minute Drivetime	20 Minute Drivetime	30 Minute Drivetime
Total Retail Gap	-\$552.6	-\$1,003.8	-\$799.8
Total Retail Trade	-\$507.1	-\$946.4	-\$757.6
Total Food & Drink	-\$45.5	-\$57.5	-\$42.1

Retail Gap by Industry Group	Retail Gap (\$M)	Potential (Sq. Ft.)*	Retail Gap (\$M)	Potential (Sq. Ft.)*	Retail Gap (\$M)	Potential (Sq. Ft.)*
Motor Vehicle & Parts Dealers	-\$29.3	--	-\$108.2	--	-\$55.5	--
Furniture & Home Furnishings Stores	-\$4.9	-12,277	-\$8.2	-20,500	-\$3.0	-7,489
Electronics & Appliance Stores	-\$7.2	-17,996	-\$19.4	-48,551	-\$36.6	-91,482
Bldg Materials, Garden Equip. & Supply Stores	-\$20.9	-52,173	-\$44.9	-112,208	-\$35.6	-88,930
Food & Beverage Stores	-\$67.7	-169,304	-\$89.8	-224,529	-\$31.5	-78,792
Health & Personal Care Stores	-\$9.1	-22,746	-\$28.7	-71,691	-\$50.2	-125,470
Gasoline Stations	\$13.4	--	\$44.2	--	\$48.2	--
Clothing & Clothing Accessories Stores	-\$2.1	-5,201	\$16.0	40,063	\$26.1	65,235
Sporting Goods, Hobby, Book, & Music Stores	-\$3.4	-8,414	-\$4.9	-12,243	-\$4.6	-11,429
General Merchandise Stores	-\$110.8	-277,108	-\$114.2	-285,455	-\$90.1	-225,262
Miscellaneous Store Retailers	-\$8.5	-21,264	-\$5.8	-14,508	\$2.2	5,490
Nonstore Retailers	-\$256.6	--	-\$582.5	--	-\$527.1	--
Food Services & Drinking Places	-\$45.5	-113,848	-\$57.5	-143,687	-\$42.1	-105,368

*Potential is based on an average sales of \$400/sq. ft. Motor Vehicles & Parts Dealers, Gas Stations, and Nonstore Retailers are not included in this calculation.
Source: ESRI Business Analyst; Houseal Lavigne Associates



Retail Gap Analysis Summary (2015)

Bristol VA: State Street & Commonwealth Avenue

Summary Demographics	10 Minute Drivetime	20 Minute Drivetime	30 Minute Drivetime
Population	38,071	86,913	179,042
Households	16,641	37,274	75,814
Median Disposable Income	\$28,354	\$32,287	\$35,007
Per Capita Income	\$20,335	\$22,441	\$24,034

Overview	10 Minute Drivetime	20 Minute Drivetime	30 Minute Drivetime
Total Retail Gap	-\$709.2	-\$934.8	-\$927.7
Total Retail Trade	-\$665.0	-\$878.7	-\$879.2
Total Food & Drink	-\$44.1	-\$56.1	-\$48.6

Retail Gap by Industry Group	Retail Gap (\$M)	Potential (Sq. Ft.)*	Retail Gap (\$M)	Potential (Sq. Ft.)*	Retail Gap (\$M)	Potential (Sq. Ft.)*
Motor Vehicle & Parts Dealers	-\$45.5	--	-\$102.6	--	-\$158.2	--
Furniture & Home Furnishings Stores	\$1.2	3,000	-\$7.2	-17,921	-\$4.1	-10,200
Electronics & Appliance Stores	\$2.0	4,973	-\$15.5	-38,722	-\$35.3	-88,347
Bldg Materials, Garden Equip. & Supply Stores	-\$9.6	-23,950	-\$36.0	-90,118	-\$38.8	-97,117
Food & Beverage Stores	-\$48.5	-121,183	-\$60.8	-152,031	-\$21.7	-54,164
Health & Personal Care Stores	-\$3.5	-8,656	-\$21.8	-54,462	-\$57.9	-144,644
Gasoline Stations	\$25.0	--	\$54.8	--	\$54.5	--
Clothing & Clothing Accessories Stores	\$8.0	19,993	\$16.8	41,903	\$30.2	75,562
Sporting Goods, Hobby, Book, & Music Stores	-\$3.9	-9,827	-\$3.9	-9,675	-\$3.4	-8,412
General Merchandise Stores	\$15.5	38,643	-\$124.2	-310,483	-\$112.1	-280,331
Miscellaneous Store Retailers	\$1.7	4,179	-\$4.3	-10,867	\$1.3	3,165
Nonstore Retailers	-\$607.4	--	-\$574.0	--	-\$533.8	--
Food Services & Drinking Places	-\$44.1	-110,298	-\$56.1	-140,172	-\$48.6	-121,435

*Potential is based on an average sales of \$400/sq. ft. Motor Vehicles & Parts Dealers, Gas Stations, and Nonstore Retailers are not included in this calculation.

Source: ESRI Business Analyst; Houseal Lavigne Associates

Retail Potential/Surplus in Square Footage

In addition to surplus and leakage figures, the accompanying charts also include supported retail potential in square footage. Converting leakage figures into square footage allows a visualization of what size and scale of retail could be supported. While sales-per-square-foot revenues vary by individual retailer and industry sources, general assumptions of supportable square footage can be made by using a benchmark average. A generally accepted range for national retailers is \$200 to \$400 per-square-foot.

The use of a per-square-foot amount on the higher end of this range allows for a more conservative approach so as not to overstate retail potential. As shown in the Gap Analysis tables, when a per-square-foot amount of \$400 is applied, demand is effectively translated to a potential number of square feet that could be supported within a five, ten, or fifteen minute drivetime. Equally, if there is a surplus, the amount of square footage in which the market is oversupplied is indicated.

It is important to note, however, that calculations cannot be effectively applied to uses such as car dealerships or gas stations. This same methodology is applied to each of the three market areas analyzed.

To help envision development potential in square footage, the following provides the average size of an assortment of retail stores, based off of data obtained by industry sources. Supported square footage from the Retail Gap Analysis can be compared to this list for context. It is important to note that these stores are listed merely for contextual purposes and not to support development of any particular brand over another.

- Chipotle – 2,650 ft²
- CVS – 19,856 ft²
- Buffalo Wild Wings – 5,600 ft²
- Olive Garden – 7,336 ft²
- The Gap – 12,503 ft²
- Barnes & Noble – 25,525 ft²
- Whole Foods – 33,739 ft²
- Best Buy – 38,631 ft²
- Kohl's – 75,230 ft²
- Walmart – 102,683 ft²
- Home Depot – 105,192 ft²
- Macy's – 181,946 ft²

In terms of existing supply and demand, both the local and regional market areas are fairly saturated with a few exceptions. This is, however, not unusual for any area that includes several large retail nodes as well as relatively easy access to other competing municipalities. Competition exists on both sides of the state line with developments such as the Pinnacle in Bristol, Tennessee and historic Downtown Abingdon, Virginia. While a strong mix of regional uses is good for everyone and creates a destination, individual businesses and municipalities still must compete.

Cost of Living

Cost of living comparisons measure the affordability of a variety of goods and services such as groceries, housing, utilities, transportation, and healthcare between different cities. Based on available data from Sperling's Best Places (a reputable website maintained by cost of living expert Bert Sperling), Bristol, VA has a relatively low cost of living.

Sperling's index uses 100.0 as the national average; any score below that means that living in a given community is more affordable than the national average and any score higher than 100.0 indicates that the community is more expensive than the national average. The index also allows for percentage comparison. For example, a community that scored 90.0 would be 10% more affordable than the national average of 100.0 while a community that scored 110.0 would be 10% more expensive than the national average.

Bristol's cost of living is indexed at 84.3 (or 15.7% more affordable than the national average). This is relatively on par with other cities in the region, such as Bristol, TN (82.0), Kingsport (85.1), and Johnson City (87.4). The Bristol region as a whole is much more affordable than other Virginia cities such as Richmond (95.4), Abingdon (100.8), Blacksburg (102.1), and Arlington (181.1).



Market Implications

Market potential is for the entire market area and is not exclusive to Bristol. A saturated market does not preclude new development or uses from locating to a specific location. It does, however, mean that the City needs to ensure that it maximizes its competitive position to ensure commercial sites have good access and exposure and that efforts are focused on uses that complement one another. The City's ability to capture its proportional share of development potential is dependent on many factors and influences. Bristol has several commercial areas, three of which are and will be major activity generators.

As the Falls develops it has the potential to be a catalyst to attract additional development around the Exit 5 area. However, it is important that new development complements and does not detract from existing uses and investment.

The Exit 7 area is an established restaurant hub further enhanced by hotels and a movie theater. Efforts need to ensure that this area continues to thrive through increased exposure and better accessibility. Juxtaposition to the highway and airports create an ideal location for accommodating travelers while also providing dining and entertainment options for local residents.

Downtown serves as a unique destination for visitors and the heart of the community for residents. Potential exists to build off of existing uses. However, the City, in conjunction with Bristol, TN must ensure that the image of Downtown is maintained and concerted efforts are made to attract the types of businesses that contribute the Downtown Bristol experience.

COMMERCIAL & EMPLOYMENT AREAS FRAMEWORK PLAN

Bristol is not only a "good place to live," but also a "good place to do business." Historically, Bristol has been a manufacturing town, however, its strategic location as well as excellent interstate, rail, and air service positions it well for a new wave of investment and job growth. Downtown Bristol serves as the "Tri-Cities' Downtown," and Bristol's culture, heritage, and national resources draw tourists and visitors from across the country. The completion of The Falls will make Bristol the premier shopping destination in the Tri Cities. Its industrial parks and areas employ thousands, and a variety of major employers provide good wages.

The Commercial and Employment Areas Plan details policies and recommendations to maintain and enhance the City's major commercial and industrial areas, including Downtown Bristol, commercial corridors and nodes, office areas, business parks, and industrial areas.



2035 Goal

In 2035, Bristol, Virginia will serve as the economic hub of the Tri Cities and be a major tourism destination capitalizing on assets of culture, heritage, and national resources.

Priority Objectives

Objective #1

Corridor Revitalization.

Reposition aging commercial areas, including Euclid Avenue, Commonwealth Avenue, West State Street, Gate City Highway, and Bristol Mall, for a new generation of investment and redevelopment.

- **1A.** Leverage incentives and financing tools such as Enterprise Zones and Tax Increment Financing to promote commercial re-investment along Euclid Avenue, Commonwealth Avenue, West State Street, and Gate City Highway.
- **1B.** Support the creative re-use or redevelopment of the Bristol Mall utilizing the framework provided in the Land Use and Development Plan.

- **1C.** Work with businesses and property owners to evaluate the creation of service districts that could collectively beautify and improve the infrastructure of key corridors.
- **1D.** Improve pedestrian and cyclist infrastructure along commercial corridors to increase connectivity between residents/consumers and local businesses.
- **1E.** Support and facilitate parcel consolidation, where appropriate, to encourage new investment and redevelopment.
- **1F.** Create gateway features consisting of signage, decorative lighting, and high-quality landscaping at key locations to announce entry into the City of Bristol.

Objective #2

Downtown Bristol.

Maintain Downtown Bristol as an exciting mixed-use environment and the cultural, social, and entertainment heart of the community.

- **2A.** Implement the recommendations of Chapter 6: Downtown Sub-Area Plan.
- **2B.** Continue cross-jurisdictional collaboration with Bristol, TN on Downtown planning and development matters, and support the mission of "Believe in Bristol."
- **2C.** Work with Bristol, TN to implement the Comprehensive Parking Study and Parking Management Plan for Downtown Bristol.
- **2D.** Enact historic zoning that can protect Bristol's historic structures from demolition and significant façade alterations.
- **2E.** Encourage, and/or incentivize, the adaptive re-use of Bristol's vacant or underutilized historic structures, including conversion of upper floors of commercial structures into residential units.



- **2F.** Work with property owners to restore the modernized facades, or covered up facades, of historic buildings to their original architectural design.
- **2G.** Review, and amend where necessary, the zoning code to ensure that new infill development within Downtown Bristol is engaging, context appropriate, and maximizes interaction with the existing built environment.
- **2H.** Add public art, including murals and sculptures, throughout Downtown to improve its unique sense of place.
- **2I.** Activate the historic Bristol Train Station and better integrate it into the fabric of Downtown through special events, pop-up events, rotating tenants, or the addition of a small park or plaza.
- **2J.** Support the development of lodging, including boutique hotel(s), within Downtown Bristol.
- **2K.** Improve the pedestrian experience by filling better striping crosswalks, adding crosswalk countdown timers, and evaluating opportunities for bike lanes and bike parking.
- **2L.** Continue to host large-scale music festivals and concerts, such as Rhythm& Roots or traveling acts of major bands, in the Downtown area.

Objective #3

I-81 Exits 5 & 7.

Continue efforts to make Exits 5 and 7 the premier shopping destination within the greater Tri Cities area.

- **3A.** Complete the planned phasing of The Falls.
- **3B.** Undertake the road and utility infrastructure improvements necessary to accommodate future residential and commercial development associated with The Falls and spin-off redevelopment.
- **3C.** Update the Code of Ordinances to facilitate the transition of the area north of Lee Highway (as identified on the Future Land Use Map), roughly between Blevins Road in the west and the railroad right-of-way in the east, into a master-planned mixed-use development(s) that can add residential density to the district.
- **3D.** Aggressively recruit new tenants to the district, publicizing Virginia's low sales tax.

Objective #4

Design & Aesthetics.

Improve the aesthetic appearance of Bristol's commercial and industrial areas and ensure their compatibility with neighboring uses.

- **4A.** Amend the Code of Ordinances to require on-site landscaping for all new commercial and industrial development.
- **4B.** Amend the Code of Ordinances to establish parking maximums that can prevent the development of unnecessarily large surface parking lots.
- **4C.** Amend the Code of Ordinances to require adequate buffering and screening between residential neighborhoods and more intense uses, such as commercial or industrial areas.
- **4D.** Amend the Code of Ordinances to require screening of industrial storage, dumpsters, and raw materials from the public right-of-way.

- **4E.** Reduce the usage of barbed wire and chain link fences along commercial corridors.
- **4F.** Develop non-binding residential design guidelines for commercial corridors and industrial parks that can provide guidance to developers and architects on new product.
- **4G.** Encourage the transition and redevelopment of incompatible land use arrangements, as identified on the Land Use Map, into more compatible land use arrangements.
- **4H.** Implement a program to screen utility boxes and unsightly facilities and locations, such as lift stations, pump houses, transformer sites, antennas, telephone switches, signal controls, etc.

Objective #5

Entertainment & Tourism.

Leverage Bristol's many unique assets to increase tourism and visitors to the city.

- **5A.** Establish a direct route that can efficiently link Bristol's two major activity generators: The Falls and Downtown Bristol.
- **5B.** Develop attractive and uniform gateway and wayfinding signage.
- **5C.** Continue to work with other agencies and property owners to "tell the story" of Bristol's history and support the museums and cultural amenities within the City centered upon its special heritage.
- **5D.** Promote Bristol as "the place to stay" and "place for a night out" when visiting major regional destinations such as the Bristol Motor Speedway, South Holston Lake, and the Cherokee National Forest.
- **5E.** Develop a marketing campaign to promote the advantages and benefits of living, working, doing business in, or visiting Bristol.

- **5F.** Continue to support existing programs and events and develop new events such as community festivals and holiday events and gatherings recognizing that these programs and events bring the community together, foster civic pride, and create a sense of unity.

Objective #6

Support Industry Expansion. Facilitate the redevelopment and/or expansion of underutilized areas identified on the Future Land Use Map for office, light industrial, and business park uses.

- **6A.** Implement the recommendations of Chapter 6: Bob Morrison Boulevard Sub-Area Plan.
- **6B.** As depicted on the Future Land Use Map, support the expansion of existing light industrial and industrial uses in identified transition areas.
- **6C.** As depicted on the Future Land Use Map, support the expansion of industry along Old Airport Road, Bonham Road, and Beacon Road.

Objective #7

Business Climate.

Proactively enhance the local business climate to provide well-paying employment opportunities and diversification of the tax base.

- **7A.** Develop an Economic Development Strategic Plan.
- **7B.** Identify target sectors and industries to help focus and guide business recruitment and retention.
- **7C.** Market and promote Bristol's low cost of living, transportation infrastructure, and proactive business climate to prospective employers.
- **7D.** Evaluate opportunities to simplify existing regulatory and permitting processes to make them more predictable, streamlined, and business-friendly.
- **7E.** Host annual breakfasts or meetings that can bring together city staff and members of the business community to discuss challenges, share ideas, and answer regulatory questions.
- **7F.** Conduct exit interviews with businesses that relocate from Bristol to better understand what influenced their decision.



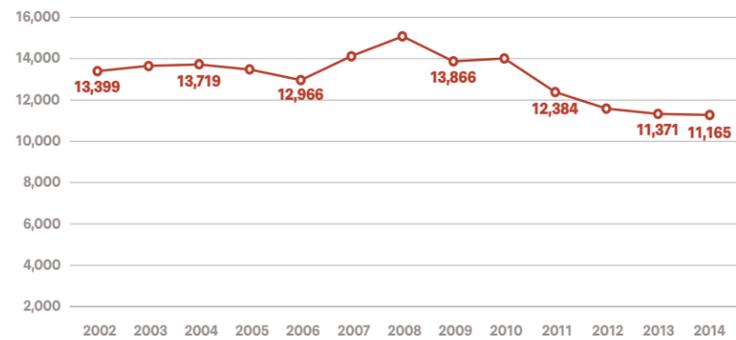
Actions & Supporting Information

Economic Snapshot

In 2014, the local economy was mostly comprised of retail, service, and "blue collar" industries. 30.8% of jobs are in the retail trade, accommodation, and food services industries; 22.1% are in manufacturing or wholesale trade industries; and 12.7% are in the administrative and support industry. Major employers within the community fall within these industries, such as Electro Mechanical Corporation (electricity products manufacturer), Shearer's (snack food plant), and Strongwell (fiber reinforced polymer manufacturer). Retail activity is mostly generated from interstate traffic originating from outside the community as well as tourism.

Total Primary Jobs (2002-2014)

Bristol, VA

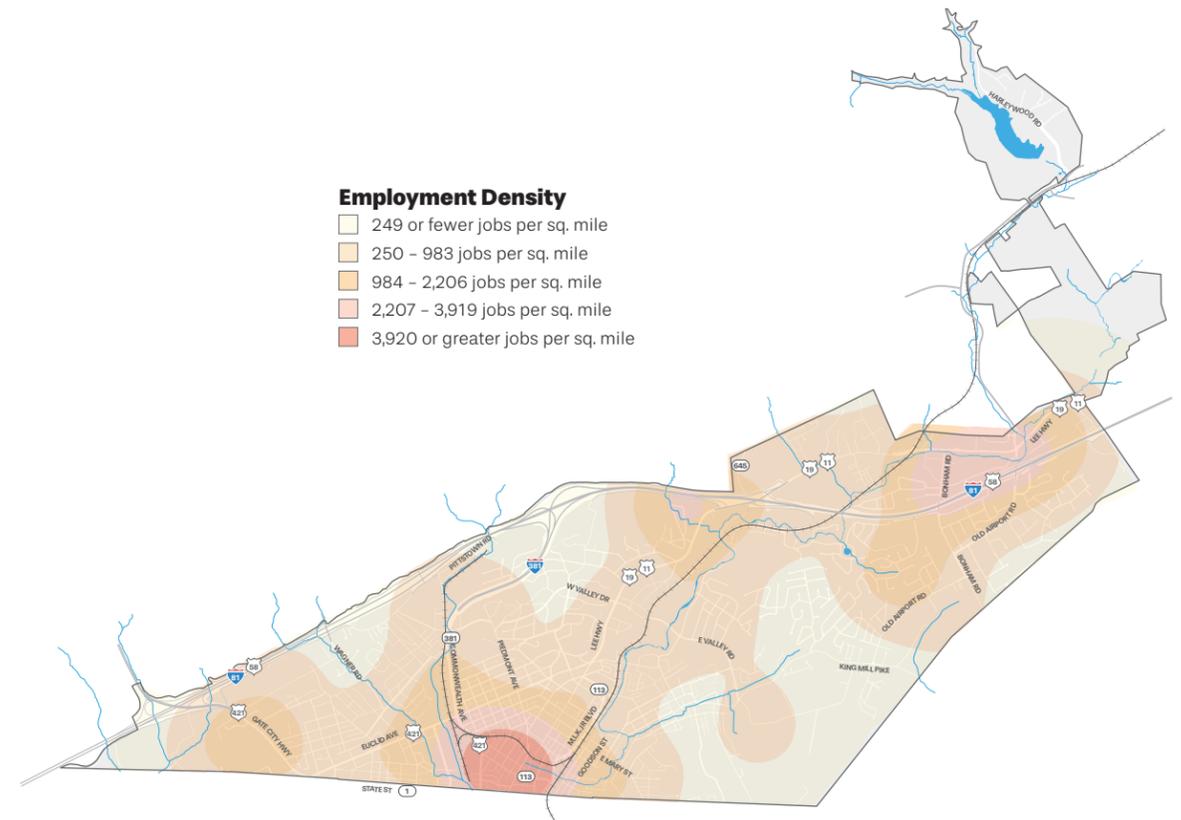


Source: U.S. Census Bureau, Center for Economic Studies

Bristol's local economy is a component of a broader regional economy (Kingsport-Bristol-Bristol, TN-VA metropolitan area). Between 2013 and 2016, the U.S. Conference on Mayors estimates that the region's gross metropolitan product will increase from \$11.1 billion to \$12.1 billion, putting it ahead of regions such as Champaign-Urbana, IL (home to the University of Illinois), Santa Fe, NM, and Bloomington, IN (home to the University of Indiana). By 2021, it is estimated that the region's gross metropolitan product will grow to \$14.8 billion, with an average annual growth rate of 3.9%.

Employment Density

- 249 or fewer jobs per sq. mile
- 250 - 983 jobs per sq. mile
- 984 - 2,206 jobs per sq. mile
- 2,207 - 3,919 jobs per sq. mile
- 3,920 or greater jobs per sq. mile





Corridor Revitalization

Bristol contains several aging commercial corridors Euclid Avenue, Commonwealth Avenue, West State Street, and Gate City Highway (which includes Bristol Mall). These corridors are auto-centric, populated with a mixture of chain and local restaurants and stores. The building stock tends to be older within strip-style development patterns. As of 2015, stretches of each are experiencing blight and disinvestment. Growth in the regional retail market elsewhere has had the effect of drawing consumers away from these older corridors and shopping areas.

Note: Recommendations for other commercial areas such as Lee Highway Exits 5 and 7 and Downtown Bristol are detailed in subsequent sections.

Overview & Approach

For a city of its size, Bristol already contains a sizable level of retail, dining, and entertainment square footage. It is imperative that the City does not saturate its retail market by overdeveloping land for retail. To that end, the Future Land Use Map was carefully crafted to prevent oversaturation, although additional acreage was dedicated for regional retail along the interstate to complete The Falls development.

As regional commercial uses continue to develop along Lee Highway near the interstate, existing commercial areas such as Euclid Avenue, Commonwealth Avenue, West State Street, and Gate City Highway (which includes Bristol Mall) will transition towards occupancy mostly by local small businesses.

It is important that these older commercial corridors are not neglected, as they serve the day-to-day needs of residents in adjacent neighborhoods. New rounds of investment must occur for the corridors to stay viable and healthy. Efforts to improve these corridors should include site redevelopment and beautification, business partnerships, and creative public incentives that can spur new private investment.

New Investment: Redevelopment & Revitalization Tools

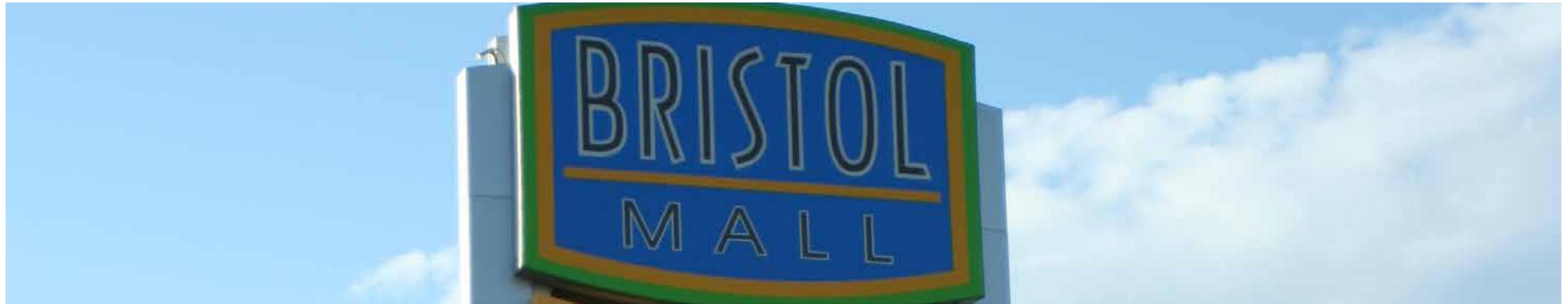
The City, corridor businesses, and other relevant stakeholders can utilize a variety of tools to help increase the vitality of Bristol's aging commercial corridors. They are detailed at the end of this chapter.

Mall Redevelopment

The Bristol Mall is a large property located along Gate City Highway in the western portion of the city. It was sold in a foreclosure auction in August 2015 and sold again in 2016, having struggled in recent years after losing major anchors. This is due to a variety of reasons, including changes in consumer behavior that are not unique to Bristol, aging infrastructure, and newer commercial development along I-81, such as The Falls (1,500,000 Gross Leasable Area) and The Pinnacle (700,000 GLA). Additionally, the 312,043 person Tri Cities market is also served by the Johnson City Mall (565,720 GLA).

It is important to make clear that under no circumstances is the Plan advocating for the mall's closure. However, the City must be proactive in planning for the site's future should the privately-operated mall cease operations. In many communities across the country, the closure of a large indoor mall often ultimately results in public involvement and costs. Communities that fail to plan and preempt market changes often find themselves in a reactive position that can delay reinvestment.

Given the size of the site, it is likely that if redevelopment occurs, it may include a master-planned blend of uses. The Future Land Use Plan identifies that Local Commercial, Professional Office, Single Family Detached, Single Family Attached, Multi-Family are all acceptable uses. Given proximity to residential uses, industrial uses are not recommended although a properly screened and buffered business park might be appropriate.



Possible redevelopment scenarios include, but are not limited to:

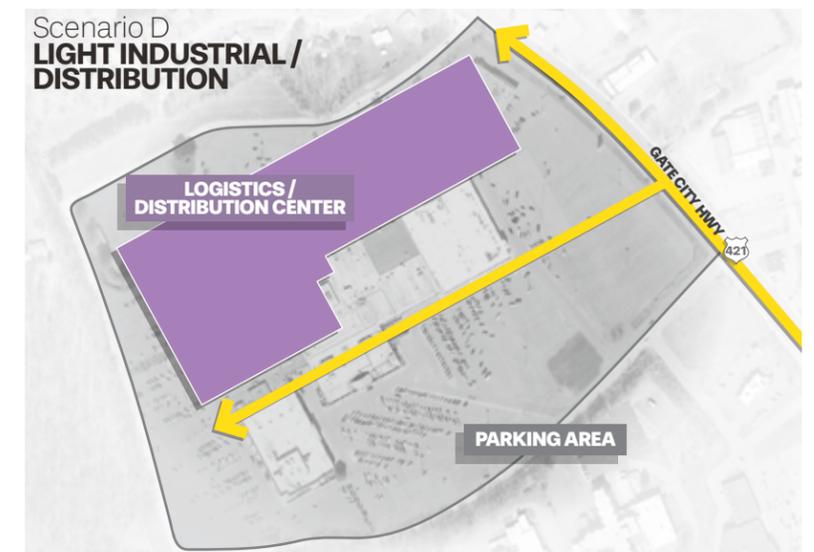
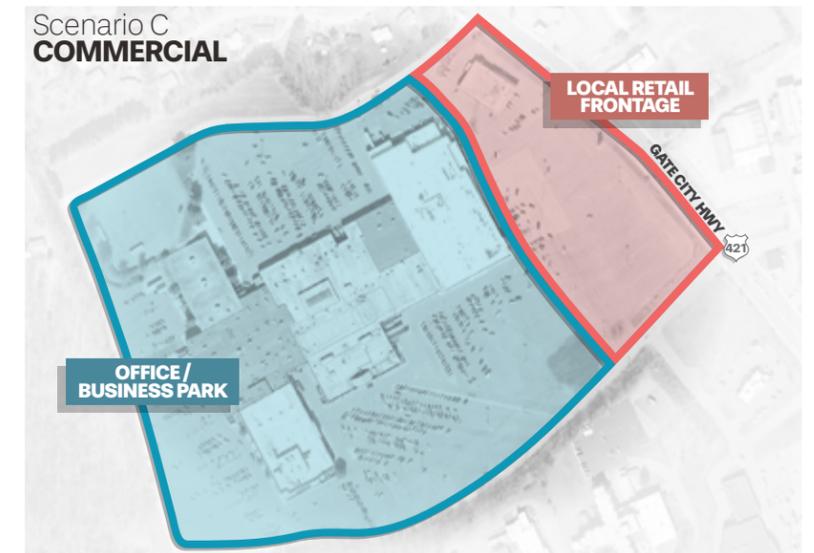
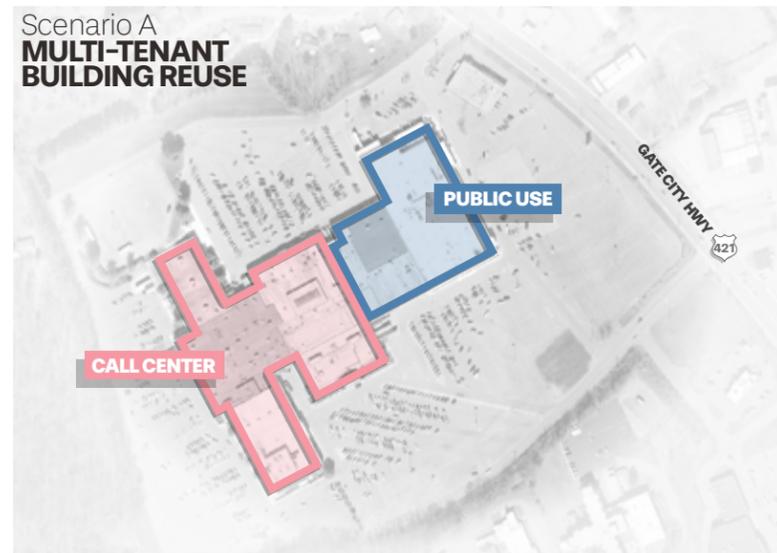
- Potential Scenario A: Multi-Tenant Building Re-Use.** The existing Bristol Mall building could be re-used by a variety of office users, including a call center which could benefit from a large footprint under one roof. Public or semi-public uses could also be incorporated, such as federal, state, or local government offices. Commercial outlots could be developed fronting Gate City Highway.

- Potential Scenario B: Site Redevelopment - Residential.** The existing Bristol Mall could be demolished and redeveloped as a residential community, with multi-family along Gate City Highway transitioning into lower density single family detached or cottage home housing.

- Potential Scenario C: Site Redevelopment - Commercial.** The existing Bristol Mall could be demolished and redeveloped with local retail frontage along Gate City Highway transitioning back to an office/business park.

- Potential Scenario D: Light Industrial / Distribution.** The existing structure could be demolished and replaced with a logistics or distribution facility. The site's size and access to the nearby interstate could make this a competitive use.

The City should continue to engage the mall's owners to ensure open two-way communication. Should the mall cease operations, the City should support the creative re-use or redevelopment of the site utilizing the framework provided within the Comprehensive Plan.





Downtown Bristol

Downtown Bristol is a walkable mixed-use environment with historic architecture that has seen significant levels of reinvestment in recent years, including the addition of new restaurants, breweries, shops, and the Birthplace of Country Music Museum. Outdoor concerts and festivals draw residents and visitors alike to this unique, niche environment. The Plan recommends that the City maintain Downtown Bristol as an exciting mixed-use environment and the cultural, social, and entertainment heart of the community.

For a detailed vision and supporting recommendations regarding Downtown Bristol, please see **Chapter 6: Downtown Bristol Sub-Area Plan**.

I-81 Regional Commercial

Lee Highway between exits 5 and 7 are Bristol's major concentrations of "big box" style retail, entertainment, and hospitality. While developed separately over time, development patterns around each exit are starting to blend together to form one large unified commercial area. It is envisioned that this area will be the premier regional shopping development within the greater Tri Cities area, given its easy interstate access, major destination anchors such as Cabela's, and lower sales tax compared to Tennessee.

The Falls

The Falls is a 1.5 million square foot commercial development located next to I-81 that is being developed through a Public Private Partnership (P3). Anchored by the first Cabela's in Virginia, The Falls is 120 acres and upon completion is expected to generate over three million annual shoppers and millions of dollars in annual sales. Development is divided into four phases, with Phase I expected to be complete in 2016 and land already cleared for Phases II and III. Phase IV will require the acquisition and redevelopment of privately held property, and is the final phase of the project under the P3. A fifth phase will be completed by private developers.

The City should continue to complete the planned phasing of the Falls as well as undertake all road and utility infrastructure necessary to complete redevelopment.

The Falls - Phase 5 Mixed-Use

The Falls - Phase 5 Mixed-Use designation is a special area along Lee Highway adjacent to The Falls development. Currently, it is mostly rural residential with some commercial uses on the northeast corner of Blevins and Lee Highway.

It is recommended that this sizable area redevelop privately over time, either as a part of one large master planned project (with several phases) or several coordinated master planned projects. The area is ultimately envisioned as a blend of residential, retail, and office uses within an integrated, moderate density environment (also known as "horizontal mixed-use").

While the details of future redevelopment may evolve over time, it is important that what is constructed aligns with the following principles:

- **Commercial frontage along Lee Highway.** Retail, office, or hospitality uses should front Lee Highway, serving as a buffer between the road and lower intensity uses.
- **Design cohesiveness.** The different components of the development should have a similar aesthetic, architectural design, and feel.

- **Connectivity.** New development should enhance Bristol's walkability and bikeability, and encourage multiple modes of transportation. Internal roadways of different pockets should align with existing roadways. Different uses should be connected to one another via sidewalks, trails, and other pedestrian amenities.
- **Diverse residential component.** The residential component may include any of the following (including a blend): single family detached, town-home, rowhome, or multi-family (rental or condominium). Design guidelines proposed in the **Residential Areas Framework Plan** should be utilized.

- **Integrating green spaces and natural features.** New development may encroach on environmentally sensitive areas, including a mature tree canopy as well as Beaver Creek. Where possible, these special natural features should be protected and integrated into the development. The City may also want to develop low impact development regulations and utilize design review to provide developers with the flexibility to cluster development in certain portions of a site, thus leaving sensitive natural features undisturbed.



Design & Aesthetics

Many highly visible buildings, corridors, industrial areas, parking areas, and business signs are unattractive and detract from the community's appearance and reputation, as well as inhibit quality tenancy. Many building façades are outdated or unsightly, and most parking areas lack landscaping (perimeter and interior). Excessive lighting and deteriorating pavement can also contribute to the negative appearance of these areas.

Bristol's commercial and industrial areas do not only provide jobs to residents, they also assist in shaping perceptions of the community to motorists passing through. It is important that these areas remain attractive and welcoming.

Landscaping

Lack of greenery along a commercial corridor can make it appear to be in economic decline as well as simply aesthetically unpleasant. Parking lot landscaping, including flowers, shrubbery, and attractive fencing, can improve a community's appearance, more clearly delineate the separation between roadway and parking lot, and provide a more pleasant pedestrian experience. Furthermore, if designed appropriately, site landscaping can more efficiently manage public infrastructure and service costs, such as stormwater. Currently, City code does not specifically require standards for site landscaping. The City should amend the Code of Ordinances to require on-site landscaping for all new development.

Design Guidelines

Design guidelines are non-binding recommendations to developers and builders on product design. They can be used by the City, architects, developers, and business owners on a cooperative basis to promote high quality new commercial and industrial construction. By following or incorporating elements of the guidelines, developers can be ensured that their proposals can receive speedy approval, thus reducing costly delays and procedural uncertainty.

The City should put together a brief flyer or policy guide highlighting preferred styles, materials, massing, and building and garage orientation for new commercial and industrial construction. The City may also decide to formally incorporate certain recommendations into the Code of Ordinances.

Fencing

Chain-linked and barbed wire fencing can be found along Bristol's commercial corridors, giving them an unappealing, unwelcoming, and harsh aesthetic. Currently, barbed wire fencing is allowed by right within all non-residential districts. Along commercial corridors, it is recommended that chain-linked fencing should be discouraged and that barbed wire only be allowed with a conditional use permit.



Poor Example



Good Example



Screening

Screening is the practice of visually shielding unattractive land uses and storage facilities from public view, typically through the usage of landscaping or fencing. City code currently contains minimal screening requirements. As such, dumpsters, industrial storage, and other raw materials can often be clearly viewed from neighboring properties or the public right-of-way.

The City should amend the Code of Ordinances to require adequate screening of:

- Industrial/commercial material storage, raw materials, auto scrap, or similar product when visible from the public right-of-way or neighboring residential use;
- Utility boxes, lift stations, pump houses, signal controls, and other utility uses;
- Dumpsters when visible within a parking lot, public right-of-way, or neighboring residential use



Poor Example



Good Example

Land Use Conflicts

As a 19th century historic railroad town, Bristol developed in an uncoordinated fashion that was typical of the time and often integrated residential and industrial uses in close proximity. Some of these conflicting uses continue to this day. In an effort to maintain employment, the Future Land Use Plan preserves several industrial areas that abut residential areas to accommodate job growth but recommends transition of other areas.

Where such conflicts exist, either in the short-term or long-term, it is imperative that the City work with property owners to implement screening and buffering. As new industry and employment development occurs, screening as well as landscaped buffers should be constructed to establish horizontal separation between more intense uses and adjacent residential areas.

For more information, please see the **Residential Areas Framework Plan**.



Tourism

The City of Bristol, Virginia and the greater region are a significant destination for entertainment and recreational tourism. Key destinations include Downtown Bristol, Rhythm and Roots Reunion festival, the Birthplace of Country Music Museum, South Holston Lake, Cherokee National Forest, and the Bristol Motor Speedway.

With a historic downtown, a Smithsonian-affiliated museum, and ample access to a range of nearby recreational destinations, Bristol can not only be a "good place to live," but a "good place to visit." A key component of Bristol's economic growth must be the leveraging of the city's unique assets to increase tourism and visitors to the city.

Special Events

Given its status as the birthplace of country music, the Bristol puts on variety of music festivals and events that draw attendees from around the country. Examples include the annual Rhythm and Roots Reunion festival as well as the 2012 Mumford and Sons "Gentlemen of the Road" concert which drew 17,500 people to Downtown Bristol. In 2014, the city added a new annual event: the Cumberplunge, a 500 foot long waterslide through the heart of the downtown. Such events increase Bristol's stature as a destination.

The City should continue to support existing programs and events, as well as work with stakeholders such as state tourism officials, Believe in Bristol, and the Bristol Convention and Visitors Bureau to develop new events, festivals, and gatherings that can bring the community together, foster civic pride, and generate new tax revenue.

Gateway Signage

The points at which tourists and visitors enter a community are called "gateway" areas. The character and appearance of these areas are important factors in determining the overall image and perception of Bristol as a whole. These gateways -- such as the intersection of Commonwealth Avenue and State Street; the intersection of Gate City Highway, State Street, and Euclid Avenue; the on/off ramps of I-81 exits 1, 5, and 7; and the intersection of Lee Highway with Resting Tree Drive and Mount Vernon Road -- can all serve as locations for distinctive signage incorporating the City's logo and having similar landscape and hardscape features.

The City already has existing gateway signs in several locations. Similarly, the Chamber of Commerce has placed a large guitar at the intersection of Volunteer Parkway and State Street. The City should work to develop a consistent gateway schematic that can welcome visitors to Bristol and communicate a positive first impression.

Wayfinding Signage

Wayfinding signs effectively direct motorists, cyclists, and pedestrians to points of interest throughout a given area. The City already has some existing wayfinding signage, however, it is sporadically located as well as lacking a consistent aesthetic (e.g. some signs are brown while others are green). In conjunction with gateways, the City should install uniform wayfinding signage throughout Bristol that can direct visitors to key destinations. These signs should have a uniform design and incorporate either the City's logo or the "a good place to live" slogan/sign. The size and scale of the signs will vary depending on the scale of the environment and speed of travel. Signage should help connect visitors to both Downtown Bristol and The Falls, directing them to the other location to increase their time in Bristol.

Zoning Overlays

The City's Zoning Code currently contains two overlays that can support and promote tourism through flexible uses and regulations, as well as incentives:

- Arts and Entertainment District Overlay.** The purpose of this overlay is to promote investment through mixed use and commercial development that expands the presence of and/or otherwise enhances the arts, culture and entertainment within the overlay. The overlay is found within the core of Downtown Bristol. Permitted uses include art galleries, art/music/dance studios, theatres, museums, artist live/work spaces, as well as residences not located on the ground floor of a mixed-use building.

- Tourism Zone Overlay.** The purpose of this overlay is to promote investment through mixed use and commercial development that expands the presence of and/or otherwise enhances the tourism industry within the overlay and to provide economic incentives and regulatory flexibility for eligible business entities which will attract visitors. The permitted uses of the underlying zoning district shall govern the uses that can occur within a tourism zone, however, the City may administer incentives to properties within this overlay zone, including reduction of municipal fees and taxes, permit process reform, exemption from certain ordinances as permitted by state law, and gap financing.



Industry

Bristol's office and industrial areas are absolutely critical to the economic health of the City, home to a diverse variety of companies. They provide jobs, opportunities for local entrepreneurs, a daytime population to patronize local shops and restaurants, and diversity which broadens the City's tax base.

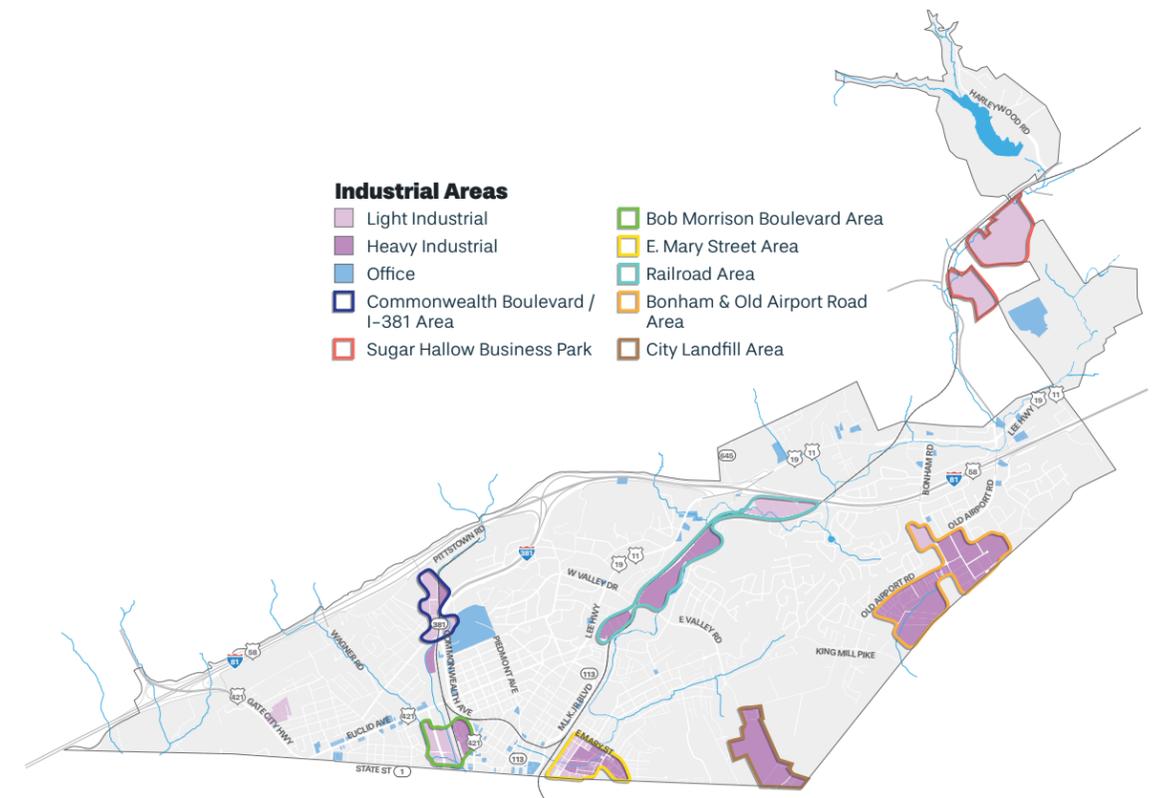
Land Constraints

Bristol's existing development pattern and hilly topography within a fixed boundary (e.g. city-initiated annexation is not permitted by the Commonwealth) have resulted in a somewhat limited volume of land for light industrial, industrial, and office development. The Future Land Use Plan took this existing condition into account and recommended the expansion of several existing employment areas into neighboring areas to accommodate economic growth. Additionally, the potential repurposing of vacant or underutilized areas, such as the Bristol Mall site, Ball Corp facility, or Bob Morrison Boulevard area, can also support economic growth.

Depending on the type of desired office and industrial user, the importance of large cleared pads varies. Space requirements differ within industries. For example, square footage per office worker is at a low while advances in manufacturing processes and a resurgence in craft manufacturing support smaller building footprints. While some types of industry may not be able to be accommodated, many other types of industry can flourish with appropriate infrastructure.

Industrial Areas

The Future Land Use envisions five central areas for industrial uses within Bristol. The Future Land Use Plan recommends expansion of several of these areas to accommodate further industrial growth over the course of the next ten years. A sixth area, in the southeast corner of the community, contains the Bristol landfill and is expected to remain as such.





Bob Morrison Boulevard Area

Located just west of Downtown, this cluster of heavy and light industry has a rich history, including the headquarters of Strongwell. Originally home to Bristol Steel, an apparel company, and a furniture factory, a number of products were built there in the early years including aircraft, radio and TV cabinets, and during WWII, carbon parts for weaponry. Bob Morrison, for whom the boulevard is named, is renowned for the creative development of the molded fiberglass MFG process for the Corvette's fiberglass body.

Currently, the area contains a blend of office, automotive, vacant, and industrial uses. The Comprehensive Plan envisions this area as a blend of industrial and business park uses that can contribute to a vibrant Bristol economy. For more detailed information, please see **Chapter 6: Bob Morrison Boulevard Sub-Area**.

Commonwealth Boulevard/I-381 Area

Home to Shearer's and Dominion Carton, this industrial area benefits from both rail and interstate access. However, single family detached uses are sandwiched between existing industrial uses.

In locations identified on the Future Land Use Map it is recommended that single family detached homes are gradually transitioned to light industrial uses over time to create a more unified environment and reduce negative impacts on residential living. Light and heavy industrial uses should be properly screened and buffered from all adjacent residential areas.

E. Mary Street Area

The area immediately east of Downtown south of E. Mary Street is currently the headquarters of Electric Motor. Immediately north are a blend of single family detached, commercial, light industrial, and heavy industrial uses (e.g. concrete, recycling, woodworking, etc.), as well as many vacant parcels. This hodgepodge of uses severely reduces quality of life for residents as well as creates inefficiencies and nuisances for businesses.

It is recommended that the residential and commercial uses within the area gradually transition into light industrial, cottage industries, and craft manufacturing uses. Redevelopment will likely require parcel assembly. For more information, please also see the **Residential Areas Framework Plan**.

Railroad Area

Along the City's active Norfolk Southern rail line are two very large industrial properties benefitting from the rail access, including Aerus (formerly Electrolux) and the former Ball Corporation plant (which closed in 2016), as well as two smaller properties currently home to Bristol Line Power and the Bristol Concrete Plant. City efforts should focus on procuring a new tenant for the Ball Corporation plant as well as safeguarding residential neighborhoods from industrial nuisances.

Bonham & Old Airport Roads Industrial Area

The Bonham Road industrial area is Bristol's established industrial area, developed on a grid system and mostly isolated from other uses. Tenants currently include a mixture of logistics, recycling, and manufacturing.

To the south of Bonham Road, along the east side of Old Airport Road, are several other heavy industrial users intermixed with single family detached uses. As depicted on the Future Land Use Map, it is recommended that the single family detached uses along the east side of Old Airport Road gradually transition to industrial uses to reduce land use inconsistency and improve quality of life. For more information, please also see the **Residential Areas Framework Plan**.

City Landfill Area

The City's quarry landfill accepts household and commercial waste, tires, brush, yard waste, and e-waste. It is expected to remain a landfill throughout the lifetime of the Comprehensive Plan.

Sugar Hollow Business Park

The Sugar Hollow Business Park contains two large parcels behind Sugar Hollow Park. The parcels are served by rail. Future access to the sites should be along Resting Tree Lane rather than solely Clear Creek Road.

While the terrain within this site may limit future development options, the neighboring land in Washington County is more conducive to development. A cooperative agreement with Washington County could lead to a larger redevelopment scenario.



Business Climate

The City's perceived business climate is integral to economic growth. The City should undertake the following initiatives to ensure a positive climate and cooperation between the City and business owners:

- Host annual breakfasts or meetings that bring together city staff and members of the business community to discuss challenges, share ideas, answer regulatory questions, and recognize successes.
- Establish regular communication via web blasts and newsletters so that the City can identify issues impacting local businesses and be proactive in developing strategies to enhance these areas.
- Work more closely with business owners looking to invest in or improve their properties, assisting them with understanding and complying with regulations and procedures.
- Conduct exit interviews with businesses that choose to relocate from Bristol to better understand what influenced their decision.

Tools for Job Growth Enterprise Zones

In 2014, the City was awarded a Virginia Enterprise Zone designation which is a state program to promote job creation and real estate investment through economic incentives and business assistance. The enterprise zone in Bristol is an area so designated by the Governor pursuant to Code of Virginia, § 59.1-538 et seq., under the Virginia Enterprise Zone Program, by virtue of an approved application or subsequent approved amendments. Following approval, the designation was adopted and incorporated into the City's Code of Ordinances in 2016.

The zone comprises one main area and two non-contiguous areas totaling 634 acres, including downtown Bristol, the Virginia Intermont campus, Bob Morrison Boulevard area, the Bristol Mall, and the Old Airport Road industrial area – all of these being areas with older development, yet with growth and revitalization potential.

The following six incentives are available within the City's established Enterprise Zones:

- **Building Façade Grants.** This incentive provides grants to cover 50% of the cost of improvements up to \$2,500. This work may include painting, cleaning, and repairing of the façade. It may also include landscaping and beautification improvements.
- **Design Assistance.** Assistance is provided by Believe in Bristol and includes architectural, landscaping, paint schemes, signage, and other information and suggestions that will enhance the image of each business as well as the downtown district.

■ Business Rental Assistance.

This incentive is to encourage new businesses to locate downtown. Businesses that create at least 4 FTE jobs and stay within their location for at least two years are eligible. Rental assistance is not to exceed \$500 monthly for six months.

- **Job Training.** This incentive provides a grant to eligible businesses that create or retain jobs. The grant is provided on a reimbursement basis after the business has documented the type of training and cost, and will be capped at \$500 per employee trained. The grant can be used for pre-employment or new employee training for jobs that are available to low and moderate income persons or training to upgrade the skills of existing workers.

■ Rehabilitated Real Estate

Tax Exemption. This incentive encourages the rehabilitation of older structures. The tax exemption will be over a ten-year period.

- **Expedited Permitting.** This incentive is meant to assist companies that are locating/expanding in the Enterprise Zone with getting active assistance in expediting any permitting process that may be required at the local level.

Foreign Trade Zone (FTZ)

Bristol is one community within the Tri Cities Foreign Trade Zone #204. Foreign-Trade Zone #204 is an integral part of the Tri-Cities region's network of services which, combined with a location convenient to a majority of the country's population, make the area a prime choice for international distribution centers and manufacturers. The FTZ offers importers exclusive benefits that are only available to zone users.

These benefits include the reduction or elimination of US Customs duties, the elimination of costly duty drawback programs, drastic reduction of transit times and delays at ocean ports, and an invaluable working relationship with the local Customs office. Serviced by Customs and Border Protection Port No. 2027, FTZ No. 204 gives businesses a distinct advantage. The zone includes many sites within the Tri Cities area.

Commonwealth's Opportunity Fund

The Commonwealth's Opportunity Fund (COF), formerly known as the Governor's Opportunity Fund (GOF), is a discretionary incentive available to the Governor to secure a business location or expansion project for Virginia. Grants are awarded to localities on a local matching basis with the expectation that the grant will result in a favorable location decision for the Commonwealth.

Tobacco Region Opportunity Fund

The Tobacco Region Opportunity Fund (TROF) provides performance-based monetary grants to localities such as Bristol in Virginia's tobacco producing region (as defined by the Commission) to assist in the creation of new jobs and investments, whether through new business attraction or existing business expansion. These grants are at the Commission's discretion.

Grants are evaluated in a manner consistent with the goals of the Commission and amounts are awarded commensurate with the project's impact on the community and/or region in which the project is locating. Evaluation of award amount is consistent throughout the region and is based on the following criteria: local unemployment rates, prevailing wage rates, number of new jobs, capital investment levels, industry type and the possibility of related economic multiplier effect.

TROF is the only Tobacco Commission grant program paid at the beginning of the project to help tobacco region localities be competitive in attracting new investment and jobs resulting in increased tax revenue and opportunity for quality employment in the tobacco region.

Virginia Jobs Investment Program

The Virginia Economic Development Partnership's Virginia Jobs Investment Program (VJIP) provides services and funding to companies creating new jobs or experiencing technological change. As a business development incentive supporting economic development since 1965, VJIP reduces the human resource development costs of new and expanding companies. With strong support from the Governor and General Assembly, VJIP is completely state-funded.

Eligibility for assistance in any of the programs offered by VJIP is limited to projects that create basic employment for Virginia. These businesses or functions must directly or indirectly derive more than 50% of their revenues from out of state sources, as determined by VJIP. Examples of activities that most often are considered basic include manufacturing, distribution, shared service centers, corporate headquarters, research and development facilities, and business-to-business technology operations.

Specific programs include the Virginia New Jobs Program, Small Business New Jobs Program, and Workforce Retraining Program.

Parcel Consolidation

Redevelopment and reinvestment can often be hindered by parcel size. For example, a prospective business may be interested in locating at a particular stretch of a corridor or at a prominent intersection, however, the available property may not be the appropriate size. If several separate contiguous parcels were combined and consolidated, the location would become viable. The City should support innovative public and private approaches to parcel assembly and comprehensive redevelopment along commercial corridors.

Tax Increment Financing (TIF)

Virginia law allows municipalities to create TIF districts as a financing tool for infrastructure and other public realm improvements. These investments can stimulate and assist private investment and redevelopment activities.

The law is unclear on whether a municipality can directly distribute TIF funds (including the receipts from a revenue bond sale) to a private developer for private realm improvements. However, the municipality can create a public-private partnership with an Economic Development Authority to do so.

A more flexible solution is to leverage a "TIF by agreement," which is permitted under Virginia law. Similarly, a municipality can partner with an EDA or CDA to secure bonds that would be issued by those entities, who can then incrementally distribute revenues as part of a performance-based redevelopment agreement. The City should explore working with local public-private partners to put such mechanisms in place to offer flexible development incentives, particularly for Downtown and Subarea redevelopment districts.

While a TIF study would need to be conducted to determine the eligibility of Bristol's commercial corridors, certain factors are certainly present. The City should evaluate the usage of TIF to promote reinvestment and redevelopment within the identified commercial corridors.



Service Districts

Under Virginia law, Bristol may create a service district to "provide additional or more complete services of government than are required in the city as a whole." An additional real estate assessment may be utilized for a variety of improvements, including physical improvements, maintenance, business promotion, and more. Such taxing districts are often referred to as a Business Improvement District or a Special Improvement District.

Business Assistance Program

A business assistance grant program can be utilized to attract targeted retail businesses and assist existing businesses located within a particular area. As with a façade improvement program, business assistance funds are typically offered in the form of a matching grant that pays for a defined percentage of eligible expenditures. The expenditures are typically limited to build-out costs, signage, moving expenses, and physical improvements to a property necessary to accommodate a new business or the expansion of an existing business.

Priority can be given to businesses that complement the City's vision for revitalizing older commercial corridors. The size of the grant available can also be tied to the overall impact the proposed project could have on the area. For example, the grant could be varied based on the anticipated sales tax to be generated by the project.

Grant monies could be used to lessen the cost burden of relocating or expanding in Bristol, particularly for manufacturing businesses that generate well-paying jobs.

Façade & Site Improvement Programs

The purpose of a Façade Improvement Program is to encourage projects which contribute to the economic revitalization and character of an area by providing financial and technical assistance for facade improvements. Building façades, both individually and collectively, create a strong first impression of an area. Redevelopment is not the only opportunity to establish improvements. By implementing a Façade Improvement Program, current property owners are provided an opportunity to improve their outdated or failing structures without having to relocate.

The purpose of an On-Site Improvement Program would be targeted at assisting current property owners in upgrading their existing parking lots and installing onsite landscaping. The program would apply to such things as improvements to surface parking areas, privately owned open space, and other areas not directly related to façade features. This could function separately or in conjunction with a façade improvement program.

The City could also create and administer a grant program for corridor businesses wishing to improve signs, awnings, lighting, and other external appearance features.





Economic Development Strategic Plan

The creation of an Economic Development Strategic Plan could greatly assist Bristol's elected and appointed officials, City staff, business community, stakeholders, investors, and more in improving the business climate and increasing the number of well-paying jobs in Bristol. Such a plan would determine Bristol's industry clusters, competitive advantages, workforce training challenges, and opportunities for recruitment, retention, and expansion.

The World Bank recommends a five-stage planning process:

- **Stage One: Organizing the Effort.** The process should begin by identifying the people, public institutions, businesses, community organizations, and other stakeholders that have an influence or interest in the local economy. This includes a "resource audit" of existing resources and programming as well as the establishment of committees that can develop and implement the plan.

- **Stage Two: Conducting the Local Economy Assessment.** The second step of the process is to determine the strengths, weaknesses, opportunities, and threats to the local economy. This could include the local economic structure, workforce capital, investment climate, government processes and regulations, industry composition, and more. Comparisons should be established relative to neighboring communities or competitor communities.
- **Stage Three: Developing the Strategy.** The third step includes the development of the vision, goals, objectives, and actions that will move the community forward. Recommendations must be aligned with available resources and staffing. The plan's actions should be incorporated into the City's operations, as well as those of supporting entities such as utilities, schools, business associations, etc.

- **Stage Four: Implementing the Strategy.** In the first step, an accountability structure for implementation should have been established that can help achieve the strategy. In Stage 3, appropriate stakeholders for implementation of each action should be identified and held responsible for implementation.
- **Stage Five: Reviewing the Strategy.** The plan's recommendations should be monitored and evaluated in real time to determine successes and where enhancements and adjustments are needed. Annual review of the strategy should ensure that the community remains responsive.

Commercial & Employment Areas Framework Plan

Bristol is not only a "good place to live," but also a "good place to do business." Historically, Bristol has been a manufacturing town, however, its strategic location as well as excellent interstate, rail, and air service positions it well for a new wave of investment and job growth. Downtown Bristol serves as the "Tri Cities' Downtown," and Bristol's culture, heritage, and national resources draw tourists and visitors from across the country. The completion of The Falls will make Bristol, Virginia the premier shopping destination in the Tri Cities. Its industrial parks and areas employ thousands, and a variety of major employers provide good wages.

CHARACTER AREAS

- **Local Commercial:** Local Commercial areas provide daily goods and services conveniently to local residential neighborhoods. The Plan recommends targeted revitalization and reinvestment of these corridors, particularly Euclid Avenue, Commonwealth Avenue, West State Street, and Gate City Highway.
- **Regional Commercial:** Regional Commercial uses are intense commercial uses that are large in scale and draw from a regional consumer audience traveling along I-81. These areas are intended to contain businesses or shopping centers that cater to the automobile, such as big box retailers. The Plan recommends continued expansion of The Falls area and envisions the I-81 Exits 5 and 7 area as the retail hub of Southwest Virginia.
- **Office:** Office uses are comprised of corporate headquarters, medical uses, legal firms, or other professional service providers. They are areas specially designated for professional office uses and they are generally located along, or near, major corridors.
- **Downtown Mixed-Use:** The Downtown Mixed-Use area comprises Downtown Bristol and aims to promote a walkable, mixed-use environment. Desired uses include a combination of residential, commercial, and office uses. Each parcel should contribute to a vibrant, mixed-use environment. Buildings should be built to the front property line. The Plan recommends investments that can keep Downtown Bristol as the "Tri Cities' Downtown," including façade improvements, new business investments, redevelopment, and festivals/entertainment.
- **Lee Highway Mixed-Use / The Falls Phase 5:** The Lee Highway Mixed-Use designation is a special area along Lee Highway proximate to The Falls development. It supports a blend of residential, commercial, and office uses within an integrated, moderate density environment. Some buildings may be mixed-use themselves while others are single-use buildings contributing to a broader mixed-use feel. It is intended that this area will be redeveloped through a coordinated master planning effort undertaken by a developer or group of developers. Commercial uses should front Lee Highway, transitioning back to lower intensity residential units as one progresses away from Lee Highway.
- **Light Industrial:** Light Industrial areas include light manufacturing and other less-intensive manufacturing uses that typically operate indoors and do not generate much noise or impact. Light industrial uses should consist of smaller service- and consumer-oriented businesses as opposed to large manufacturers.
- **Heavy Industrial:** Heavy Industrial uses are generally larger in scale and may include the processing of chemicals and plastics, refineries, mining, and industrial machinery. These uses can have visual, noise, traffic, or environmental impacts on adjacent areas. Areas identified as Industrial should be reserved for manufacturing, industry, and related uses; other uses should be discouraged within these areas. The Plan recommends expansion of several existing industrial areas to accommodate additional job growth.

OTHERS

- **Bristol Mall:** The City must be proactive in planning for the site's future should the privately-operated mall cease operations. Communities that fail to plan and preempt market changes often find themselves in a reactive position that can delay reinvestment. The Plan recommends several redevelopment scenarios, including re-use and redevelopment for retail, office, and residential purposes.
- **The Falls:** Anchored by the first Cabela's in Virginia, The Falls is 120 acres and upon completion is expected to generate over three million annual shoppers and millions of dollars in annual sales. Development is divided into five phases, with Phase I expected to be complete in 2016 and land already cleared for Phases II and III. Phase IV will require the acquisition and redevelopment of privately held property. Phase V will be undertaken by a private developer. The City should continue to complete the planned phasing of the Falls as well as undertake all road and utility infrastructure necessary to complete redevelopment.
- **Downtown Historic Preservation:** Using the existing federal district as a starting point, the City should work with neighborhood groups and historic preservation experts to develop a downtown historic preservation ordinance.
- **Expansion / Transition Properties:** Residential areas located within industrial areas are recommended for transition away from residential uses towards light and heavy industrial uses. This does not require any resident to relocate but instead informs what type of redevelopment should occur if the property was to be vacated in the future.
- **Screening:** Commercial and industrial areas should be properly screened from residential uses through landscaping or fencing. When redevelopment occurs, adequate setbacks and buffering are also necessary.
- **Tourism:** Tourism is vital to the City's vitality and some of the City's most famous destinations include State Street, The Falls, Sugar Hollow Park, Bristol Pirates, Birthplace of Country Music Museum, and Clear Creek Golf Course.

