Bon Secours Washington Redskins Training Center
Baseline Metrics for Leigh Street, East End, and West End project sites
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Introduction

In January of 2017, the City of Richmond Economic Development Authority tasked the Center for Urban and Regional Analysis at VCU (CURA) with analyzing the impacts of several ongoing economic development projects. Ultimately, the city wishes to better understand the impacts of its projects—the ways in which economic development efforts and incentives aid in community revitalization and the ways in which it may not.

This report encompasses three impact areas related to the Bon Secours Washington Redskins Training Camp: Leigh Street, the East End, and the West End.

Securing data at the neighborhood level can present challenges. In reaching a greater level of detail geographically, other levels of detail may be lost. CURA has sought to strike a balance between geographic detail and informative measures.

Summary of findings

Leigh Street Impact Area

- **Total Population Change** - Increased 38 percent from 2009 to 2015.
- **Racial and Ethnic Change** - Population has grown across racial and ethnic categories, but growth among the white population has outpaced all other groups.
- **Population Age Cohorts** - Population growth has been driven by significant gains in younger residents (18 to 34).
- **Educational Attainment** - The growth in younger population between 2009 and 2015 coincided with an increase in educational attainment levels among those 25 years and older.
- **Ownership vs. Rental Trends** - The rentership rate increased from 75 percent in 2009 to 83 percent in 2015.

West End/Westhampton Impact Area

- **Total Population Change** - The population of the West End area fell between 2009 and 2015, from 9,058 to 7,921.
- **Racial and Ethnic Change** - Population decline has occurred exclusively in the white population, which declined from 8,254 to 6,612.
- **Population Age Cohorts** - The 18 to 24 age group represents the largest age cohort in the study area. The population of most age groups fell between 2009 and 2015, with the greatest losses in people under age 35 or over age 74.
- **Educational Attainment** - The West End study area includes a highly-educated population, with 2015 estimates indicating 73 percent of individuals 25 and older had attained a Bachelor's degree or higher.
- **Ownership vs. Rental Trends** - The majority of occupied housing units in the area—74 percent—are owner occupied.
- **Assessed Property Values** - The total assessed value per parcel square foot increased from $23.94 in 2009 to $26.35 in 2017.
- **Median Household Income** - The median household income of the study increased by 16 percent between 2009 and 2015, from $35,766 to $41,605.
- **Business and Employment** - The number of businesses in the study area declined overall from 2011 to 2015. However, the number of jobs grew by more than 330.
- **Unemployment** - The area’s unemployment rate increased from 3 percent in 2011 to 5 percent in 2015.
- **Crime** - Incidents of criminal activity in the Leigh Street and Scott’s Addition area generally trended downward between 2009 and 2015, with the exception of sex offense incidents, which increased.

1 For example, the American Community Survey (ACS) offers neighborhood level data at the cost of temporal detail: neighborhood estimates are collected over five years rather than one year. In this report, ACS estimates may best be understood as rolling five year estimates. Numbers from 2009 (which are collected from 2005 to 2009) and 2011 (collected from 2007 to 2011) will include three years of overlap. Data from sources other than the ACS represent a single year (crime incident counts) or a point in time (job and business counts—average of the second quarter of the year identified).
$28.83 in 2017, marking a significant jump from a low of $26.02 in 2013.

- **Median Household Income** - The median household income of the area grew between 2009 and 2015 from $103,768 to $118,480.

- **Business and Employment** - In 2015, 340 businesses listed their physical address within the study area. Those businesses represented 5,656 jobs.

- **Unemployment** - The percent of the civilian labor force unemployed in the West End was seven percent in 2015.

- **Crime** - Incidents of crime in the study area trended downwards between 2009 and 2015, with the exception of burglary.

**East End/Church Hill Impact Area**

- **Total Population Change** - The population of the study reached 19,776 in 2015, marking a peak just five years after a low of 18,028 in 2010.

- **Racial and Ethnic Change** - The population has grown across most racial and ethnic groups, with the fastest growth between 2009 and 2015 occurring in the white population (59 percent growth).

- **Population Age Cohorts** - The 25 to 34 age cohort experienced rapid growth between 2009 and 2015, increasing by 52 percent.

- **Educational Attainment** - Residents who completed high school but did not earn a Bachelor’s degree represent the largest group by educational attainment, constituting 55 percent of the population age 25 and older in 2015.

- **Ownership vs. Rental Trends** - Renter occupied housing units constitute the majority of dwellings in the study area with 71 percent of all occupied units.

- **Assessed Property Values** - Although values declined from 2009 to 2013 from $6.88 to $6.23 per parcel square foot, values rebounded, reaching a high of $7.98 in 2017.

- **Median Household Income** - The median household income of the study area was $26,420 in 2015.

- **Business and Employment** - The number of area businesses increased from 111 in 2011 to 132 in 2015. Jobs increased from 1,294 to 1,510.

- **Unemployment** - Although the area’s unemployment rate was 10.4 percent in 2015, the neighborhood rate has been trending downward since 2011.

- **Crime** - Overall, crime incidents have trended downward since 2009.
Background

In June of 2012, the Washington Redskins organization announced it would move its summer training camp from Ashburn, Virginia to the City of Richmond. The announcement marked the end of months-long discussions between the Redskins, the City of Richmond Department of Economic and Community Development, Virginia economic development officials, and several private organizations. A preliminary economic impact analysis estimated the training camp would have a total annual impact of $8.5 million on Richmond’s economy.2

However, the process of site selection, design, construction, and financing remained open until the October 2012 announcement of Bon Secours Richmond Health System (BSRHS) as a partner and corporate sponsor in the project.3,4 The involvement of BSRHS expanded the scope of the project from a single football training camp into a package of expansion and revitalization projects, with $40 million of BSRHS investments in three distinct parts of the city. Richmond city council approved the package in November 2012.5 The approved package established the following:

- First, the training camp would be built on a state-owned Leigh Street property behind the Science Museum of Virginia. BSRHS would build sports medicine offices and a men’s health clinic in conjunction with the training facility.6
- Second, Richmond leased BSRHS the Westhampton School site—an unused city property in Richmond’s West End—for expansion of nearby St. Mary’s Hospital.7
- Third, BSRHS planned to expand its Richmond Community Hospital in the city’s East End, or Church Hill. This expansion followed a series of efforts to invest in and revitalize the neighborhoods surrounding Richmond Community Hospital8

As of 2017, these projects are at different stages of completion. The Bon Secours Washington Redskins Training Center on Leigh Street opened in 2013. The complex serves as a football training camp for three weeks of the year and as offices for sports medicine and physical therapy services year-round. However, the second floor of the Leigh Street facility has not been rented out.9 The planned expansion of Richmond Community Hospital in the East End remains a work in progress. Costs associated with anticipated reuse of the Westhampton School in the city’s West End have resulted in delays, and plans for the site have changed.10

Baseline metrics: Leigh Street

The Leigh Street facility represents the catalyst and most visible element of the BSRHS/Washington Redskins/City of Richmond arrangement. An underused 17-acre site has become a complex of

6 Larter, “Bon Secours Makes a Big Play.”
7 Zullo, “Council Approves Redskins Deal with Unanimous Vote.”
medical offices, training facilities, and athletic fields. Construction completed in 2013. The Leigh Street study area—for the sake of collecting available demographic and economic data—includes Scott’s Addition and Newtowne West (see Figure 1). Land uses within the study boundaries include land-intensive industrial, warehousing, and cultural facilities as well as dense commercial and residential. The Scott’s Addition neighborhood has experienced rapid development, reuse, and growth in the years following the late 2000s recession.

There have been two notable developments near the Leigh Street facility. To the north, construction on the revitalization of the 60-acre site containing the Diamond began in 2016, anticipating up to 4,000 housing units, 500,000 square feet of retail and entertainment, 375,000 square feet of office space, and a hotel with up to 250 rooms. Considering lodging is the highest expenditure for visitors to the Leigh Street facility and full service food is the second highest, these additional uses will impact—and be impacted by—the Leigh Street facility. To the south along Broad Street, the Leigh Street facility is situated between two Bus Rapid Transit stops but is not included in the half-mile walkshed of either due to the lack of street and sidewalk connections. The City of Richmond is also implementing a bike share program that will place one location on Broad Street just south of the Leigh Street facility during its first phase of implementation and a second near the intersection of Hermitage and Leigh Street, within walking distance, during the second phase.

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Figure 1: Leigh Street study area

Leigh Street/Scott's Addition study area
Demographics

The total population of the Leigh Street study area increased by 388 people from 2009 to 2015 (Figure 2). The 38 percent increase far exceeded the city’s overall growth of 6 percent in the same period (Figure 3). Although available data does not allow for analysis of population growth at a geography more specific than the study area, the dense residential growth of Scott’s Addition has likely driven the increase.

Figure 2: Leigh Street study area population

The population has grown across racial and ethnic categories, but growth among the white population has outpaced all other groups. The percent of the population identifying as white increased from 56 percent in 2009 to 62 percent in 2015 (Figure 4). Despite a 30 percent increase in the number of residents who identify as black or African-American the study area between 2009 and 2015, the share of black residents in the study area has shown little change.

Figure 4: Leigh Street study area by race and ethnicity

Source: American Community Survey 5-year Estimates
Population growth has been driven by significant gains in younger residents. Residents in the 25 to 34 group represented 47 percent of the population in 2015, up from 31 percent in 2009 (see Figure 5). Residents between 18 and 34 represented 69 percent of the area’s population in 2015, far outpacing the age groups’ 35 percent share of the city’s population in 2015. The number of area children fell significantly between 2009 and 2015, from 177 individuals to 15. Development in the Scott’s Addition neighborhood—including breweries and apartments—has appeared to match the lifestyle and budget needs and wants of younger, Richmond citizens without children.

The growth in younger population coincided with an increase in educational attainment levels among those 25 years and older. Residents with a Bachelor’s degree or higher—the red and orange lines in Figure 6—grew from 12 percent of the population in 2009 to 41 percent in 2015. The same groups grew from 33 percent to 36 percent of the city’s total population in the same period.

Figure 5: Leigh Street study area age cohorts by year

Households

Renter occupied households are strongly represented in the study area. The number of rental households almost doubled from 284 in 2009 to 566 in 2015 (Figure 7)—a likely result of the addition of rental units throughout Scott’s Addition. Although the number of owner occupied dwellings changed little between 2009 and 2015, the ownership rate fell from 25 to 17 percent (Figure 8). The rate of ownership throughout the city fell from 47 percent to 42 percent in the same period.

Figure 6: Leigh Street study area educational attainment

Source: American Community Survey 5-year Estimates

Figure 7: Leigh Street study area household types by year

Source: American Community Survey 5-year Estimates
The median household income of the study area has typically measured below the city median. However, the area median from 2009 to 2015 increased by 16 percent (Figure 9), compared to a 2 percent decline in the city median. The 2015 study area median of $41,605 was comparable with the city median of $42,394.

### Economic Conditions

The rising median household income has not translated into declining rates of unemployment. Although the area has maintained a relatively low level of unemployment, it increased from 3 percent in 2011 to 5 percent in 2015 (Figure 10). Richmond city's unemployment rate fell from 11 percent to 10 percent in the same period.
The number of businesses in the study area—represented by the bars in Figure 11—declined overall from 2011 to 2015. However, the number of jobs—represented by the line in Figure 11—grew by more than 600 after hitting a low of 9,414 in 2012. The study area experienced two large jumps in the number of jobs—2012 to 2013 and 2014 to 2015. The first jump—338 jobs between 2012 and 2013—coincides with the construction of the Bon Secours Washington Redskins Training Camp. The following sectors drove the 2012-2013 increase in jobs:

- Arts, Entertainment, and Recreation (101 jobs)
- Construction (94 jobs)
- Transportation and Warehousing (70 jobs)
- Administrative and Support and Waste Management and Remediation Services (55 jobs)

The second jump, between 2014 and 2015 (301 jobs) was led by increases in Construction jobs (217) and Health Care and Social Assistance jobs (74 jobs). Overall, the following sectors grew the most jobs between 2011 and 2015:

- Health Care and Social Assistance (271 jobs)
- Construction (253 jobs)
- Transportation and Warehousing (109 jobs)
- Real Estate and Rental and Leasing (103 jobs)
- Accommodation and Food Services (98 jobs)

Growth in Construction appears to have been driven by the permanent location of two contractors in the study area.

In contrast, the Retail Trade sector shrank by 280 jobs, the Wholesale Trade sector shrank by 185 jobs, and the Management of Companies and Enterprises sector shrank by 129 jobs between 2011 and 2015.

Assessed property values per parcel square foot grew overall between 2009 and the most recent available assessments in 2017. However, that net growth includes a significant drop between 2009 and 2013 (Figure 12). The total value per parcel square foot fell from $23.94 to $22.23 between 2009 and 2013. The total value rose sharply after 2013 to $26.35 per square foot in 2017.

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15 Business and job counts are taken in the second quarter of each year.
Crime

Incidents of criminal activity in the Leigh Street and Scott’s Addition area (Figure 13) generally followed city trends (Figure 14) between 2009 and 2015, declining overall and by most categories. Incidents categorized as sex offenses have trended upward in the study area, as have vehicle theft incidents. Figure 13 and Figure 14 show the number of incidents in the study area and Richmond city per 100,000 individuals. Crime rates in the Leigh Street area are notably higher than citywide rates, particularly Sex Offense, Assault, Vice, Theft, and Vehicle theft.
Tax Revenues

Economic development incentives may relieve a portion of a target business’ tax burden for a defined period. However, such incentives should ultimately increase the tax revenues collected from an area through increased property values, commercial activity, and business attraction.

The City of Richmond collects local taxes from both residents and businesses on personal property, occupational licensing, prepared meals, and other items. This section examines available tax data to identify trends in the total amount billed in each study area before, during, and after the use of incentives for economic development projects.

Admission tax: The City collects a tax of seven percent on any charge for admission (over $0.50) into an entertainment venue or place of amusement. Such a tax is applicable to tickets for musical acts, sporting events, street festivals, movie theaters, and other similar events and venues. The Leigh Street study area features several admission tax-generating venues.

Richmond’s billing of admission taxes rose sharply between 2009 and 2016 from just over $300,000 to $700,000 (see Figure 15). The starting year of the study period, 2009, marked the single year during which no minor league baseball team was affiliated with the city.

The Diamond, Richmond’s baseball stadium, lost the Triple-A Richmond Braves as a tenant in 2008, but it gained the Double-A Richmond Flying Squirrels in 2010. Attendance at Flying Squirrels games peaked in 2010 at 463,842 and declined annually through 2016, according to Minor League Baseball data. As such, the steady increase in admission tax billed cannot be fully attributed to the Flying Squirrels.

Richmond’s only major first-run movie theater, Movieland at Boulevard Square, opened in 2009 and expanded in late 2012.

Although the Washington Redskins organization requires tickets for visitors to watch training camp practices, there is no charge for the tickets.

The unadjusted amount billed climbed sharply from 2014 to 2016. Construction of the Bon Secours Redskins Training Camp (across Leigh Street from the aforementioned movie theater) was completed in 2013.

Figure 15: Leigh Street admission tax billing (current dollars)

![Admissions](image)

Source: City of Richmond Dept of Economic and Community Development

Business, Professional, and Occupational License (BPOL) tax: Richmond collects taxes and fees from businesses through licensing requirements. The amount collected depends on the nature of the business as well as that business’ annual gross receipts. Businesses with gross receipts below $5,000 are exempted from taxes or fees. Businesses with gross receipts of at least $5,000 but below $100,000 pay a flat $30 fee. Businesses with receipts of $100,000 or more pay a tax on those receipts. The tax rate on gross receipts at and above the $100,000 threshold varies based on the type of business.

Contractors pay a rate of $0.19 per $100 of gross contracts and/or 1.5 percent of fees from contracts on a fee basis. BPOL taxes billed for contractors in the Leigh Street study area trended downward between 2009 and 2012, falling from $387,000 to $164,000 (see Figure 16). Taxes billed between 2012 and 2016

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have trended slightly upward, and the $252,000 billed in 2016 marks the largest sum since 2010.

Figure 16: Leigh Street contractor BPOL tax billing (current dollars)

Personal Service Contracts, or contractors paid for services rather than goods, are taxed at a rate of $0.36 per $100 of gross receipts. BPOL taxes billed for personal service contracts in the Leigh Street study area remained relatively flat between 2009 and 2014 after accounting for adjustments, hovering around $400,000 each year (see Figure 17). The total began an upward trend in 2014, reaching $541,000 in 2016.

Figure 17: Leigh Street personal service contract BPOL tax billing (current dollars)

Retail Merchants pay a BPOL tax rate of $0.20 per $100 of gross receipts. Retail taxes billed trended upward between 2009 and 2016, from just over $300,000 in 2009 to almost $425,000 in 2016 (Figure 19).

Figure 19: Leigh Street retail merchants BPOL tax billing (current dollars)

Professional Occupations, such as architects, attorneys, CPAs, and other service-based fields that require knowledge gained through specialized instruction, are taxed at a rate of $0.58 per $100. BPOL taxes billed for professional occupations steadily totaled around $200,000 from 2009 to 2016 (Figure 18).

Figure 18: Leigh Street professional occupations BPOL tax billing (current dollars)
Wholesale Merchants pay a BPOL tax rate of $0.22 per $100 of gross receipts. Wholesale merchants in the Leigh Street study area represented the largest source of BPOL tax billing between 2009 and 2016. Amounts billed between 2009 and 2012 varied widely between $500,000 and $700,000 (see Figure 20). However, the total billed grew steadily from $600,000 in 2013 to $700,000 in 2016.

Figure 20: Leigh Street wholesale merchants BPOL tax billing (current dollars)

Prepared Meals—food and drinks prepared and purchased in restaurants, food trucks, or other food establishment—are taxed at a rate of six percent on top of the local sales tax (one percent). The total meals tax billed in the Leigh Street study area more than doubled between 2009 and 2016 from $1 million to $2.4 million. Growth picked up notably after 2012, around the time of the construction of the Bon Secours Washington Redskins Training Center (see Figure 21).

Business Personal Property (Programmable Computer Equipment) is taxed at a rate of $3.70 per $100 of assessed value. The value of an item is reported at a percentage of the self-assessed value, depending on the age of the item. For example, a business computer is assessed at 70 percent of its value in the first year and 10 percent of its value in the fifth year.

Annual totals billed for business computer equipment in the Leigh Street study area fell from $6,800 in 2009 to $4,800 in 2016 (Figure 22). The downward trend included dips in 2011 and 2014. The pattern suggests businesses with computers have aging property, increasingly less-valuable property, or self-reporting inconsistencies.
Business Personal Property (Furniture, Fixtures, and Equipment). Businesses must also pay a $3.70 tax per $100 of self-assessed value on non-computer items such as furniture and other equipment.

The total non-computer property tax billed in the Leigh Street study area has shown no clear trend since 2009. The total billed reached a low of $278,000 in 2011 and a high of $486,000 in 2012 before leveling off near $360,000 in 2015 and 2016 (see Figure 23).
Baseline metrics: West End

City council approved the arrangement to lease the Westhampton School site to BSRHS in 2012. The original plan called for an adaptive reuse project, converting the historic property into an expansion of nearby St. Mary's Hospital. BSRHS also proposed using the building as a nursing school. However, the site remains unused, and BSRHS has made a request to demolish the building.

The Westhampton School site is surrounded by several higher income residential neighborhoods, small boutique retail stores, and a private university. Three Chopt, the Country Club of Virginia, and the University of Richmond are immediately west of the site (see Figure 25). Westhampton, Willow Lawn, and Stonewall Court to the east include smaller, moderate-cost housing and multifamily units.

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17 Oliver, "Bon Secours Proposal to Level Westhampton School Widely Opposed."
Figure 25: West End study area
Demographics

The population of the Westhampton site and surrounding neighborhoods fell between 2009 and 2015, from 9,058 to 7,921 (Figure 26), although it did rise between 2014 and 2015. The contraction stands in contrast with growth in the city overall (see Figure 27). Population decline has occurred exclusively in the white population, which declined from 8,254 to 6,612. All other populations by race and ethnicity have grown. These shifts have resulted in an increased share of the population who identify as non-white, from 9 percent in 2009 to 17 percent in 2015 (Figure 28).

Figure 26: West End study area total population

![Figure 26: West End study area total population](source: American Community Survey 5-year Estimates)

The 18 to 24 age group represents the largest age cohort in the study area, which reflects the proximity of the University of Richmond campus. The population of most age groups fell between 2009 and 2015, with the greatest losses in people under age 35 or over age 74 (see Figure 29). Although the 35 to 44 and 45 to 54 age groups experienced net increases in population, the trends have been relatively flat.

Figure 27: Population percent change from 2009

![Figure 27: Population percent change from 2009](source: American Community Survey 5-year Estimates)

The 18 to 24 age group represents the largest age cohort in the study area, which reflects the proximity of the University of Richmond campus. The population of most age groups fell between 2009 and 2015, with the greatest losses in people under age 35 or over age 74 (see Figure 29). Although the 35 to 44 and 45 to 54 age groups experienced net increases in population, the trends have been relatively flat.

Figure 28: West End study area population by race and ethnicity

![Figure 28: West End study area population by race and ethnicity](source: American Community Survey 5-year Estimates)
The West End study area includes a highly-educated population, with 2015 estimates indicating 73 percent of individuals 25 and older had attained a Bachelor’s degree or higher. The number of residents with a Bachelor’s degree (but not a Master’s degree) fell from 2,265 in 2009 to 1,686 in 2015 (Figure 30). Most growth occurred in both high educational attainment populations (Master’s degree or more) and low educational attainment populations (those without a high school degree).

Households

The majority of occupied housing units in the area—74 percent—are owner occupied. However, housing tenure changes between 2009 and 2015 suggest a move away from home ownership (see Figure 31). The number of owner occupied units in the study area fell from 2,139 to 1,752 between 2009 and 2015. The number of renter occupied units increased from 439 to 619. The home ownership rate of the area fell from 83 percent in 2009 to 74 percent in 2015 (Figure 32).
The housing tenure trend may suggest conversion of owner-occupied units to rental units, possibly occupied by students.

Although the number of individuals with a Bachelor's degree in the area has declined, the median household income of the area grew between 2009 and 2015 from $103,768 to $118,480 (Figure 33). The study area median contrasts with that of the city in both amount and direction. The city's 2015 median of $42,394 is 36 percent of the West End median and represents a 2 percent decline from 2009.

The western half of the study area (Census tract 505) was excluded from calculation of the area's median income, as data sources could not provide that information for this tract. The large number of residents in group quarters—46 percent of the tract's population—suggests the median income could not be measured due to both the student status of many residents as well as the inability to measure a "household" in dormitories.

The large student presence also helps in understanding the high median income shown in Figure 33 and the somewhat high unemployment rate shown in Figure 34. The student-heavy Census tract was included in calculating the unemployment rate.
Economic Conditions

The percent of the civilian labor force unemployed in the West End ranged between 6 percent and 9 percent between 2011 and 2015 (see Figure 34). The West End’s 2015 unemployment rate of 6.7 percent remains lower than the city’s rate of 10.0 percent, despite the proximity of the University of Richmond (and its full time students) the study area.

Figure 34: West End unemployment

In 2015, 340 businesses (represented by the bars in Figure 35) listed their physical address within the study area. Between 2010 and 2014, the number of businesses ranged between 316 and 324. The number jumped by 23 between 2014 and 2015, driven by increases in Professional, Scientific, and Technical Services businesses and Health Care and Social Assistance businesses.

Those businesses represented 5,656 jobs in 2015 (represented by the line in Figure 35), up from a low of 4,881 in 2012. Job growth trended positively between 2011 and 2015, despite a dip between 2011 and 2012 that may be attributed to a decline in Retail Trade jobs. The following sectors experienced the strongest job growth between 2011 and 2015:

- Accommodation and Food Services (138 jobs)
- Health Care and Social Assistance (58 jobs)
- Art, Entertainment, and Recreation (55 jobs)
- Educational Services (40 jobs)

Retail Trade shrank by 68 jobs (7 percent) over the same period.

Figure 35: West End count of businesses and jobs

The total assessed value per parcel square foot in the study area was $28.83 in 2017, marking a significant jump from a low of $26.02 in 2013 (see Figure 36). Assessed values declined from 2009 to 2013, but made a sharp jump between 2016 and 2017 after a slow rebound from 2013 to 2016.

Figure 36: West End total assessed value per total square feet of parcels

Source: American Community Survey 5-year Estimates

Source: Virginia Employment Commission, "Quarterly Census of Employment and Wages (QCEW)"

Source: City of Richmond Assessor of Real Estate
Crime

Incidents of crime in the study area trended downwards overall between 2009 and 2015 (see Figure 37). Burglary incidents showed an upward trend through 2014 but declined significantly in 2015. Vehicle theft spiked in 2015. Crime incidents analyzed for this report include only data from the Richmond city Police Department as tabulated and categorized by Richmond police standards. Incidents recorded by the University of Richmond Police have not been included, as we cannot currently identify which incidents took place within the study area and which took place outside the study area (but still on the University of Richmond campus). However, data from the University of Richmond police suggests sex offense and burglary counts may increase if those numbers were able to be included.18

Figure 37: West End crime incidents per 100,000 population

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<td>Other</td>
<td>3%</td>
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Source: City of Richmond Police Department, Crime Incident Information system

Tax Revenues

Economic development incentives may relieve a portion of a target business’ tax burden for a defined period. However, such incentives should ultimately increase the tax revenues collected from an area through increased property values, commercial activity, and business attraction.

The City of Richmond collects local taxes from both residents and businesses on personal property, occupational licensing, prepared meals, and other items. This section examines available tax data to identify trends in the total amount billed in each study area before, during, and after the use of incentives for economic development projects.

Admission tax: The City collects a tax of seven percent on any charge for admission (over $0.50) into an entertainment venue or place of amusement. Such a tax is applicable to tickets for musical acts, sporting events, street festivals, movie theaters, and other similar events and venues. The Leigh Street study area features several admission tax-generating venues.

Richmond’s billing of admission taxes hovered between $30,000 and $35,000 from 2009 to 2014 (see Figure 38). The total billed fell sharply in 2016 to $7,300.

Business, Professional, and Occupational License (BPOL) tax: Richmond collects taxes and fees from businesses through licensing requirements. The amount collected depends on the nature of the business as well as that business’ annual gross receipts. Businesses with gross receipts below $5,000 are exempted from taxes or fees. Businesses with gross receipts of at least $5,000 but below $100,000 pay a flat $30 fee. Businesses with receipts of $100,000 or more pay a tax on those receipts. The tax rate on gross receipts at and above the $100,000 threshold varies based on the type of business.

Contractors pay a rate of $0.19 per $100 of gross contracts and/or 1.5 percent of fees from contracts on a fee basis. BPOL taxes billed for contractors in the West End study area trended downward between 2009 and 2012, falling from $13,700 to about $6,000 (see Figure 39). Taxes billed between 2012 and 2016 have trended upward. The 2016 total of $11,300 remains below the 2009 peak.

Personal Service Contracts, or contractors paid for services rather than goods, are taxed at a rate of $0.36 per $100 of gross receipts. BPOL taxes billed for personal service contracts in the West End study area remained relatively stable between 2009 and 2016, falling slightly through 2010 to $174,000 before increasing to a high of $224,000 in 2015 (see Figure 40). The total fell slightly in 2016 to $214,000.
Professional Occupations, such as architects, attorneys, CPAs, and other service-based fields that require knowledge gained through specialized instruction, are taxed at a rate of $0.58 per $100. BPOL taxes billed for professional occupations steadily totaled between $335,000 and $375,000 from 2009 to 2016 (Figure 41).

Retail Merchants pay a BPOL tax rate of $0.20 per $100 of gross receipts. Retail taxes billed trended upward between 2009 and 2016, from just over $300,000 in 2009 to almost $425,000 in 2016 (Figure 42).

Wholesale Merchants pay a BPOL tax rate of $0.22 per $100 of gross receipts. Wholesale merchants in the West End study area represented the smallest source of BPOL tax billing between 2009 and 2016. The total billed fell from $1,200 in 2009 to $800 in 2011 (see Figure 43). However, the total bounced back in 2012 and has remained near or above $1,200 through 2016.
Prepared Meals—food and drinks prepared and purchased in restaurants, food trucks, or other food establishment—are taxed at a rate of six percent on top of the local sales tax (one percent). The total meals tax billed in the West End study area grew steadily between 2009 and 2016 from $1.1 million to $1.7 million (see Figure 44).

Figure 44: West End prepared meals tax billing (current dollars)

![Prepared Meals](image)

Source: City of Richmond Dept of Economic and Community Development

Business Personal Property (Programmable Computer Equipment) is taxed at a rate of $3.70 per $100 of assessed value. The value of an item is-reported at a percentage of the self-assessed value, depending on the age of the item. For example, a business computer is assessed at 70 percent of its value in the first year and 10 percent of its value in the fifth year.

Annual totals billed for business computer equipment in the West End study area fell from a high of $20.70 in 2010 to a low of $2.99 in 2016 (Figure 45).

Figure 45: West End business personal property tax billing - computer equipment (current dollars)

![Personal Property - Computers](image)

Source: City of Richmond Dept of Economic and Community Development

Business Personal Property (Furniture, Fixtures, and Equipment). Businesses must also pay a $3.70 tax per $100 of self-assessed value on non-computer items such as furniture and other equipment.

The total non-computer property tax billed in the West End study area has shown a slightly negative trend since 2009. The total billed reached a high of $3,600 in 2010 and fell to $3,000 in 2016 (see Figure 46). A dip in 2015 to $2,400 stands out from the trend.

Figure 46: West End business personal property tax billing - other equipment and furniture (current dollars)

![Personal Property - Non-computers](image)

Source: City of Richmond Dept of Economic and Community Development
Lodging, or rooms for short-term rent in hotels and motels, is taxed at a rate of eight percent. The tax is allocated entirely to the Greater Richmond Convention Center.

No lodging taxes were billed in the West End.

Baseline metrics: East End / Church Hill

The East End—including the Church Hill neighborhood—is home to BSRHS’s Richmond Community Hospital. BSRHS committed to at least $6.7 million in new investment, an expansion of Community Hospital, development of a medical village, services focused on community needs, and a women’s health focus. Development of a new office building and hospital expansion remain incomplete, but plans have shown signs of moving forward, including the assembling of land for an $8.5 million medical office building on Nine Mile Road. Bon Secours has also provided a series of grants to East End businesses and raised money for the redevelopment of a vacant structure for use as a community center and coffee shop.

Although major aspects of the BSRHS agreement in the East End remain incomplete, investment and activity in the neighborhood has been significant even prior to the training camp’s construction.

The East End Study area encompasses four public housing communities—Whitcomb Court, Mosby Court, Creighton Court, and Fairfield Court—totaling over 1,800 units. These communities are clustered to the north of the study area (see Figure 47), which remains a mix of small single-family homes and duplexes outside of the public housing communities. To the south, communities such as Church Hill and Union Hill have experienced an inflow of both interest and investment in recent years.

21 Geiger, “Bon Secours to Spend $50,000 Backing East End Startups.”
23 O’Neal, “Office Building to Add to East End Hospital.”
Figure 47: East End study area
Demographics

The population of the study reached 19,776 in 2015, marking a peak just five years after a low of 18,028 in 2010 (see Figure 48). Growth slightly outpaced the city at 8 percent from 2009 to 2015 (Figure 49). The neighborhood remained majority black or African-American (83 percent) in 2015, with the next largest group being the white population (12 percent of the population) (see Figure 50). The population has grown across most racial and ethnic groups, with the fastest growth between 2009 and 2015 occurring in the white population (59 percent growth). The Hispanic or Latino population declined between 2009 and 2015.

Figure 48: East End study area total population

Source: American Community Survey 5-year Estimates

Figure 49: Population change in percent from 2009

Source: American Community Survey 5-year Estimates

Figure 50: East End study area population by race and ethnicity

Source: American Community Survey 5-year Estimates

Individuals under 18 constituted the largest age cohort in the study area with 28 percent of the entire population in 2015. Individuals age 25 to 34 were the second-largest cohort with 21 percent of the population. The 25 to 34 age cohort experienced rapid growth between 2009 and 2015, increasing by 52 percent (see Figure 51). Other age cohorts experiencing strong growth include 18 to 24 (32 percent), and 55 to 64 (26 percent). The population age 75 and older declined by 56 percent in the same period.
Residents who completed high school but did not earn a Bachelor's degree represent the largest group by educational attainment, constituting 55 percent of the population age 25 and older in 2015. Individuals without a high school diploma represent the second largest group. However, that cohort shrank by 25 percent between 2009 and 2015 (see Figure 52). The fastest growing groups by educational attainment in the East End are individuals with a Bachelor’s degree (an increase of 110 percent between 2009 and 2015) and individuals with a Master’s degree (an increase of 64 percent in the same period).

Households

Renter occupied housing units constitute the majority of dwellings in the study area with 71 percent of all occupied units (Figure 53). The number of renter-occupied units increased between 2009 and 2015 by 21 percent—slightly greater than the citywide increase of 18 percent. Although the number of owner occupied units declined in the same period, it did so at a slower rate (-2 percent) than the city overall (-4 percent). The rate of home ownership in the area declined from 33 percent in 2009 to 29 percent in 2015 (Figure 54).
Economic conditions

Although the area’s unemployment rate of 10.4 percent in 2015 was slightly higher than the citywide rate of 10.0 percent, the neighborhood rate has been trending downward since 2011 (the earliest available data at the neighborhood level). The decline in the unemployment rate from 17.1 percent to 10.4 percent (see Figure 56) indicates more rapid progress than the citywide decline of 1 point between 2011 and 2015. The decline was steepest between 2014 and 2015, falling nearly two points.

The median household income of the study area was $26,420 in 2015 (Figure 55)—significantly lower than the city median of $42,394. The study area median shrank slightly faster between 2009 and 2015 (-4 percent) than the city median (-2 percent).
The number of area businesses increased from 111 in 2010 to 132 in 2015 (see the bars in Figure 57). Much of the increase occurred between 2014 and 2015 and may be attributed to new businesses in Accommodation and Food Services, Retail Trade, and Construction.

The number of jobs in the study area also increased over the same period from 1,294 to 1,510 (see the line in Figure 57). The following sectors experienced the strongest job growth between 2011 and 2015:

- Arts, Entertainment, and Recreation (98 jobs)
- Health Care and Social Assistance (83 jobs)
- Educational Services (63 jobs)

During the same period, both the Information sector and the Transportation and Warehousing sector shrank by 96 percent, totaling a loss of around 60 jobs.

The property value (in dollars per parcel square foot) of the study area has experienced a similar trend to the Leigh Street/Scott’s Addition area and the West End. Although values declined from 2009 to 2013 from $6.88 to $6.23 per parcel square foot, values rebounded, reaching a high of $7.98 in 2017 (see Figure 58). The pattern of decline through 2013 followed by rebound echoes the other study areas. However, the study area had fully recovered from its 2013 low within one year, indicating that either property values in the East End were not impacted by the recession to the same degree as other neighborhoods or that the recovery in the East End has been stronger.

Increasing property values and stagnant income growth suggest the area’s prosperity is not widespread. The East End remains home to many of Richmond’s lower-income households, and increases in property values may increase the tax burden on some families to levels they cannot afford.
Crime

Crime incidents have trended downward in the East End since 2009 almost across the board. The East End has historically experienced a disproportionately high number of number of homicides relative to the rest of the city, and although the number fluctuates significantly from year to year, it has seen a jump since 2014 (see Figure 59). Incidents in almost every other category reached lows in 2015.

East End crime incident rates per 100,000 people in several categories are lower than the Leigh Street/Scott’s Addition study area (see Figure 60), including burglary, vice, theft, and total crime incidents. Categories that have shown a clear pattern of decline in the East End include assault, burglary, robbery, vice, and the “other” category. In all, total crime incidents per 100,000 population between 2009 and 2015 declined by 31 percent.

Figure 59: East End crime incidents per 100,000 population

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Homicide</td>
<td></td>
<td>59%</td>
<td>38</td>
<td>50</td>
<td>62</td>
<td>41</td>
<td>46</td>
<td>21</td>
<td>61</td>
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<tr>
<td>Sex offense</td>
<td></td>
<td>-38%</td>
<td>131</td>
<td>111</td>
<td>103</td>
<td>56</td>
<td>56</td>
<td>109</td>
<td>81</td>
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<tr>
<td>Robbery</td>
<td></td>
<td>-62%</td>
<td>678</td>
<td>527</td>
<td>532</td>
<td>434</td>
<td>332</td>
<td>367</td>
<td>258</td>
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<tr>
<td>Assault</td>
<td></td>
<td>-16%</td>
<td>4,281</td>
<td>4,582</td>
<td>4,171</td>
<td>3,810</td>
<td>3,433</td>
<td>3,464</td>
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<tr>
<td>Burglary</td>
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<td>-32%</td>
<td>1,181</td>
<td>1,148</td>
<td>1,115</td>
<td>838</td>
<td>643</td>
<td>998</td>
<td>799</td>
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<tr>
<td>Vice</td>
<td></td>
<td>-47%</td>
<td>2,952</td>
<td>2,113</td>
<td>2,003</td>
<td>2,232</td>
<td>2,351</td>
<td>1,717</td>
<td>1,578</td>
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<tr>
<td>Theft</td>
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<td>-24%</td>
<td>2,761</td>
<td>2,957</td>
<td>2,813</td>
<td>2,978</td>
<td>2,576</td>
<td>2,896</td>
<td>2,104</td>
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<tr>
<td>Vehicle theft</td>
<td></td>
<td>-39%</td>
<td>667</td>
<td>571</td>
<td>423</td>
<td>598</td>
<td>485</td>
<td>352</td>
<td>410</td>
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<tr>
<td>Other</td>
<td></td>
<td>-31%</td>
<td>15,821</td>
<td>13,973</td>
<td>12,524</td>
<td>12,176</td>
<td>10,532</td>
<td>10,610</td>
<td>10,912</td>
</tr>
<tr>
<td>All</td>
<td></td>
<td>-31%</td>
<td>28,510</td>
<td>26,032</td>
<td>23,747</td>
<td>23,161</td>
<td>20,453</td>
<td>20,533</td>
<td>19,792</td>
</tr>
</tbody>
</table>

Source: City of Richmond Police Department, Crime Incident Information system

Figure 60: 2015 crime incidents per 100,000 persons

<table>
<thead>
<tr>
<th>Crime type</th>
<th>Leigh Street</th>
<th>East End</th>
<th>West End</th>
<th>Richmond</th>
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<tbody>
<tr>
<td>Homicide</td>
<td>0</td>
<td>61</td>
<td>0</td>
<td>20</td>
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<tr>
<td>Sex offense</td>
<td>216</td>
<td>81</td>
<td>0</td>
<td>80</td>
</tr>
<tr>
<td>Robbery</td>
<td>216</td>
<td>258</td>
<td>38</td>
<td>228</td>
</tr>
<tr>
<td>Assault</td>
<td>4,179</td>
<td>3,590</td>
<td>139</td>
<td>2,074</td>
</tr>
<tr>
<td>Burglary</td>
<td>1,297</td>
<td>799</td>
<td>164</td>
<td>746</td>
</tr>
<tr>
<td>Vice</td>
<td>3,026</td>
<td>1,578</td>
<td>25</td>
<td>965</td>
</tr>
<tr>
<td>Theft</td>
<td>12,320</td>
<td>2,104</td>
<td>757</td>
<td>2,898</td>
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<tr>
<td>Vehicle theft</td>
<td>1,153</td>
<td>410</td>
<td>63</td>
<td>424</td>
</tr>
<tr>
<td>Other</td>
<td>33,357</td>
<td>10,912</td>
<td>1,692</td>
<td>8,403</td>
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<tr>
<td>All</td>
<td>55,764</td>
<td>19,792</td>
<td>2,878</td>
<td>15,838</td>
</tr>
</tbody>
</table>

Source: City of Richmond Police Department, Crime Incident
Tax Revenues

Economic development incentives may relieve a portion of a target business’ tax burden for a defined period. However, such incentives should ultimately increase the tax revenues collected from an area through increased property values, commercial activity, and business attraction.

The City of Richmond collects local taxes from both residents and businesses on personal property, occupational licensing, prepared meals, and other items. This section examines available tax data to identify trends in the total amount billed in each study area before, during, and after the use of incentives for economic development projects.

**Admission tax:** The City collects a tax of seven percent on any charge for admission (over $0.50) into an entertainment venue or place of amusement. Such a tax is applicable to tickets for musical acts, sporting events, street festivals, movie theaters, and other similar events and venues.

No admission taxes were billed in the East End study area between 2009 and 2016.

**Business, Professional, and Occupational License (BPOL) tax:** Richmond collects taxes and fees from businesses through licensing requirements. The amount collected depends on the nature of the business as well as that business’ annual gross receipts. Businesses with gross receipts below $5,000 are exempted from taxes or fees. Businesses with gross receipts of at least $5,000 but below $100,000 pay a flat $30 fee. Businesses with receipts of $100,000 or more pay a tax on those receipts. The tax rate on gross receipts at and above the $100,000 threshold varies based on the type of business.

Contractors pay a rate of $0.19 per $100 of gross contracts and/or 1.5 percent of fees from contracts on a fee basis. BPOL taxes billed for contractors in the East End fluctuated between $6,000 and $7,000 from 2009 to 2012 (see Figure 61). The total billed jumped to $10,700 in 2013 and $16,900 in 2014, reflecting a significant increase in East End-based contractor activity. The total billed fell back to $7,100 in 2015 but increased to $9,000 in 2016.

![Figure 61: East End contractor BPOL tax billing (current dollars)](image)

**Personal Service Contracts**, or contractors paid for services rather than goods, are taxed at a rate of $0.36 per $100 of gross receipts. BPOL taxes billed for personal service contracts in the East End study area showed strong upward growth between 2009 and 2016 (see Figure 62). The nearly doubled from $58,000 in 2009 to $104,000 in 2016.

![Figure 62: East End personal service contract BPOL tax billing (current dollars)](image)
Professional Occupations, such as architects, attorneys, CPAs, and other service-based fields that require knowledge gained through specialized instruction, are taxed at a rate of $0.58 per $100. BPOL taxes billed for professional occupations also showed strong growth between 2009 to 2016, increasing from $25,000 to $150,000 (Figure 63).

Figure 63: East End professional occupations BPOL tax billing (current dollars)

Retail Merchants pay a BPOL tax rate of $0.20 per $100 of gross receipts. Retail taxes billed trended downward between 2009 and 2016, from almost $70,000 in 2009 to $41,000 in 2016 (Figure 64).

Figure 64: East End retail merchants BPOL tax billing (current dollars)

Wholesale Merchants pay a BPOL tax rate of $0.22 per $100 of gross receipts. Wholesale merchants in the Leigh Street study area represented the largest source of BPOL tax billing between 2009 and 2016. Amounts billed between 2009 and 2012 varied widely between $500,000 and $700,000 (see Figure 65). However, the total billed grew steadily from $600,000 in 2013 to $700,000 in 2016.

Figure 65: East End wholesale merchants BPOL tax billing (current dollars)
Prepared Meals—food and drinks prepared and purchased in restaurants, food trucks, or other food establishment—are taxed at a rate of six percent on top of the local sales tax (one percent). The total meals tax billed in the Leigh Street study area more than doubled between 2009 and 2016 from $1 million to $2.4 million. Growth picked up notably after 2012, around the time of the construction of the Bon Secours Washington Redskins Training Center (see Figure 66).

Annual totals billed for business computer equipment in the East End study area jumped from under $100 before 2012 to $455 in 2013 (Figure 67). The total billed fell steadily after 2013, reaching $139 in 2016.

Business Personal Property (Programmable Computer Equipment) is taxed at a rate of $3.70 per $100 of assessed value. The value of an item is reported at a percentage of the self-assessed value, depending on the age of the item. For example, a business computer is assessed at 70 percent of its value in the first year and 10 percent of its value in the fifth year.

The total non-computer property tax billed in the East End study area has shown a significant increase in 2015 and 2016. The total billed ranged between $5,500 and $8,000 from 2009 to 2014 but jumped to $19,300 in 2015 (see Figure 68). The total fell slightly to $17,800 in 2016.
Lodging, or rooms for short-term rent in hotels and motels, is taxed at a rate of eight percent. The tax is allocated entirely to the Greater Richmond Convention Center.

No lodging taxes were billed in the East End study area between 2009 and 2016.