



Shacklefords Commercial Development Analysis

Prepared for King and Queen County

by the Fall 2019 Urban Commercial Revitalization Class
Master of Urban and Regional Planning Program
L. Douglas Wilder School of Government and Public Affairs

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Photo by Will Parson, Chesapeake Bay Program



VCU L. Douglas Wilder School of
Government and Public Affairs

by Commercial Revitalization, URSP 666
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The Shackelfords Commercial Development Plan
was prepared for
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of King and Queen County

by

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We are also grateful to all respondents of our surveys. The information that you provided us was vital to the development of our recommendations. To everyone that we talked to at Community Pride Day at Central High School, thank you for taking the time to speak with us and for your enthusiasm in sharing your experiences with us. We hope that the information and recommendations provided in this report lead to the improvements you want to see within your community.

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Executive Summary

King and Queen County believes that economic development is crucial to ensuring a stable economy and high quality of life for residents of the county. With an out-commuting rate of 71% for the entire Middle Peninsula region, residents and businesses are spending their money outside of the region due to a lack of job opportunities and commercial development. However, the intersection of Route 33 and The Trail at Shackelfords within King and Queen County provides a major economic development opportunity for King and Queen County and the Middle Peninsula region.

Through a one-semester research project, students in a VCU Commercial Revitalization course were invited by King and Queen County Administrator, Thomas Swartzwelder, to complete research on King and Queen County's opportunity to attract the commuting traffic passing Shackelfords each day, as well as meet the desires of the community and the existing plans for this site. A VDOT Smart Scale funded development, currently in the design phase, will create a telecommuting center at the Shackelfords site, and relocate the offices of the Middle Peninsula Planning District Commission (PDC) to the same development. On a separate site at the same intersection, a privately established craft brewery site represents a convergence of new development that could spur additional commercial opportunities.

Attracting new commercial development in King and Queen County, as with most rural localities, is challenging due to low population densities, lack of existing commercial development, and lack of public infrastructure. However, opening in 2017, a Dollar General store located at Shackelfords has proven to be successful in spite of these challenges. This success serves as an example of the potential for new commercial development along Route 33; the Dollar General meets several needs of the community by offering a diverse array of products at low costs, but it does not fulfill all of the community's desires for development in the county.



Photo by famartin from Wikipedia



These community needs and desires were surveyed through in-person conversations and paper questionnaires at a Community Pride Day in October 2019. During these conversations it was made clear that the lack of food retail inside of the county, both traditional grocery and restaurants is a concern for many residents. Beyond a need to travel outside of the county for basic household necessities like grocery items, residents noted that there are few places in the county where community members can gather and interact with each other. In a longer-form survey of over 60 individuals, there was further interest expressed by residents for a traditional grocery store, a restaurant/bar concept, recreation/entertainment options, and medical services within the county.

Although almost any type of commercial development would be readily welcomed by residents, development at Shackelfords would garner more support from the community if it addressed their desires: Grocery or food retail developments with some kind of social element. This report provides four main templates for developments in King and Queen County, with a goal of using the additional traffic through the county from both daily commuters and seasonal water-related tourism to provide a greater baseline of monetary support and potential customers than might originally be assumed exist in a county of approximately 8,000 residents.

Based on the findings of these tasks, four potential development scenarios are recommended, and each is profiled in-depth in the full report:

- **“Community Cultivation”** - Agrihood Development with a Community Hub
- **“The Doctor is Online”** - Traditional Planned Unit Development with a Medical Anchor
- **“Get Your Groceries on Route 33”** - Independent Grocer with Additional Services
- **“The Trailhead”** - Tourist-oriented Country Store with Restaurant Concept



Photo by Will Parson, Chesapeake Bay Program

Introduction

As a rural county, King and Queen County has very little commercial development within its boundaries. Furthermore, the county's geography provides few opportunities for a central commercial development location. However, two major arterial highways that cross King and Queen County at its north and south ends represent potential commercial corridors. At its southern end, State Route 33 (Lewis Puller Memorial Highway) is a heavily trafficked corridor that provides access for many residents of the region to Interstate 64. Route 33 also serves as the major corridor for seasonal residents and tourists of the Northern Neck coming from Interstate 64. Located along Route 33 within King and Queen County is an intersection with the potential to bring significant commercial activity to the county.

The lack of commercial retail within the county has been a concern among County and regional officials but also local residents who are seeking more diverse options within a shorter distance. All major retail options in the region are located outside of the county - especially grocery retail and restaurateurs. However, planned development at the intersection at Route 33 and State Route 14 (The Trail) serves as one of the first major development nodes within the county. A telecommute center, new offices for the Middle Peninsula Planning District Commission, and Dragon Run Brewing - which opened late fall 2019 - will all be located at this site. These three developments provide a major opportunity for the County to provide additional commercial development to meet community needs.

King and Queen County and the Middle Peninsula Planning District Commission have been working to develop this site. In the summer of 2019, they requested the assistance of Dr. John Accordino's Urban Commercial Revitalization Class to enhance their work through a study of potential development scenarios for the site. The Shacklefords Commercial Development Plan was created in order to provide King and Queen County with potential development scenarios for the intersection of State Route 33 (Lewis Puller Memorial Highway) and State Route 14 (The Trail) - the Shacklefords site.

In order to provide implementable and creative visions for the site, the class completed the following tasks:

- Reviewed existing planning documents:
 - King and Queen County Comprehensive Plan 2030 (adopted March 2019)
 - Middle Peninsula Comprehensive Economic Development Strategy (adopted December 2013)
- Analyzed data from Middle Peninsula Commuter Survey
- Inventoried existing grocery options in the region
- Compiled a compendium of food access options
- Distributed a survey to gauge satisfaction with current grocery options and interest in commercial development categories
- Conducted informal interviews with community members
- Analyzed the feasibility for food access options at the Shacklefords site

Based on the findings of these tasks, four alternative development scenarios are recommended for consideration:

- "Community Cultivation" - Agrihood Development with a Community Hub
- "The Doctor is Online" - Traditional Planned Unit Development with a Medical Anchor
- "Get Your Groceries on Route 33" - Independent Grocer with Additional Services
- "The Trailhead" - Tourist-oriented Country Store with Restaurant Concept

These scenarios were recommended because they present an opportunity to not only meet community needs and desires but also provide goods and services to commuters, seasonal residents, and tourists. While the Shacklefords Commercial Development Plan provides a high-level vision of these scenarios, the data presented in this report should provide King and Queen County and the Middle Peninsula Planning District Commission the necessary information to begin tailoring economic development plans to encourage local private development towards a sustainable and long-term improvement at the Shacklefords site.

Shacklefords Site

The proposed Shacklefords Site is at the three-way intersection of Lewis Puller Memorial Highway (SR-33) and The Trail (SR-14). Route 33 is a four-lane divided highway that links Interstate 64 in the west to Glens in Gloucester County to the east (Figure 1). The Trail is a two-lane minor arterial highway that is the major north-south corridor within King and Queen County. For almost all centrally located residents of King and Queen wanting to exit the county, travel along The Trail to either Route 360 or Route 33 is necessary.

This intersection, like most of the county, is currently home to rural-style development, which includes several large parcels under an agriculture designation with a few single-family homes closer to Route 33 road frontage. Non-residential developments at the site include the Shacklefords post office, Job Assistance Center, Inc, a Middle Peninsula based employment office, Sears Real Estate & Appraisals, and the newly-opened Dragon Run Brewing.

To the east and south of the intersection are Resource Protection Areas and Resource Management Areas associated with Goaders Creek, a tributary of the York River. The King and Queen County Comprehensive Plan outlines the ways development may proceed near these protected areas.

Notable at the site is the 3.5 acre parcel which formerly housed the King and Queen County Farmers Market. King and Queen County secured VDOT Smart Scale funding for the development of a 4,000 square foot telework center, the Middle Peninsula's only alternative work center, which will have broadband internet access, 25 telework stations, parking, and a bus stop (Figure 1). The facility will also provide services for home-based and small businesses, such as meeting space, virtual conferencing equipment, and copying and faxing services. In addition to the telework center, the Middle Peninsula Planning District Commission will relocate their offices to this site. This development is fully funded and is on-track for construction to begin in September 2021.

The new development of both regional offices and a telework center has begun to pique development interest among the owners of other parcels within the Shacklefords Development Hub, which is designated as one mile north along Route 14 where it intersects with Route 33, and one mile along Route 33 both east- and west-bound from the same intersection. The development hub extends 1000 feet inward from the centerline of each roadway. It is with these larger parcels and development interests in mind that this research was completed.



Figure 1) Map of Shacklefords Site

The Dollar General

Less than a mile away from the Shackelfords site, the Dollar General is located at 3860 Lewis B. Puller Highway on a 3.057 acre parcel (Figure 2). Since opening, the store has seen consistent traffic and an active customer base. The store's general manager reported an average daily traffic of 300 shoppers per day in 2019. A consistent question heard from the community has been "How do we get similar retail establishments in King & Queen County?" King & Queen County is unaccustomed to new retail developments but the Dollar General has shown such developments are not only wanted in the county, but feasible.

Dollar General is the largest "small box" discount retailer in the United States. Headquartered in Goodlettsville, TN, the company was established in 1939. As of August, 2019, there are more than 15,000 Dollar General stores--more locations than any other retailer--with more than 135,000 employees, located across 44 states. Dollar General's strategic initiative has been to enter underserved, rural retail markets and establish not only grocery options but also a community presence. Dollar General offers its customers a wide variety of products at prices below \$10. These products include everything from frozen foods, eggs, and milk to shaving cream, laundry detergent, and children's toys. The company has recently rolled out a healthier product initiative called DG Fresh which it hopes to have in nearly a third of its stores by the end of 2019. The DG Fresh products are currently "Better for You" items i.e. coconut water, protein bars, and healthy snacks. The company plans to expand DG Fresh into fresh produce and meats as well (see *Increasing Access to Food: A Comprehensive Report on Food Supply Options: Discount Variety Stores* for additional information).



Figure 2) Map of Shackelfords Site in relation to Dollar General



Potential Demand for New Grocery Options

Commuter Survey

A commuter survey was conducted by the Middle Peninsula Planning District Commission in 2019 to better understand commuter behavior and preferences for the Middle Peninsula region. This online survey was pushed to individuals driving through West Point via a geofence, a virtual boundary that triggers a pre-programmed action on an individual's mobile device when that device either enters or leaves the boundary. The online survey ad then appeared on the social media of commuters. As of September 2019, the survey had 404 participants. Questions asked by the survey sought to understand where commuters live and work, what time they commute, and other commuting behaviors such as spending and additional stops. The survey results show that many commuters live and work in Gloucester County (Figure 3) and (Figure 4). However, some commuters work as far away as Washington, D.C. and Moyock, North Carolina.

Participants were specifically asked about the two stores and locations where they do most of their grocery shopping. Not all participants provided a location with the store name and some did not name a store that sells groceries. The vast majority of participants cited Food Lion and Wal-Mart as their main grocery stores. Food Lion was mentioned a total of 170 times by participants while Wal-Mart was mentioned 130 times. Although locations were not provided for all stores, the most mentioned location of a store location was Gloucester with 116 mentions. The most commonly mentioned locations of Food Lions were Central Garage and West Point in King William County, Tappahannock in Essex County, and Saluda in Middlesex County. For Wal-Mart locations, the most commonly mentioned locations were Mechanicsville in Hanover County, Tappahannock in Essex County, Lightfoot in York County, and Gloucester.

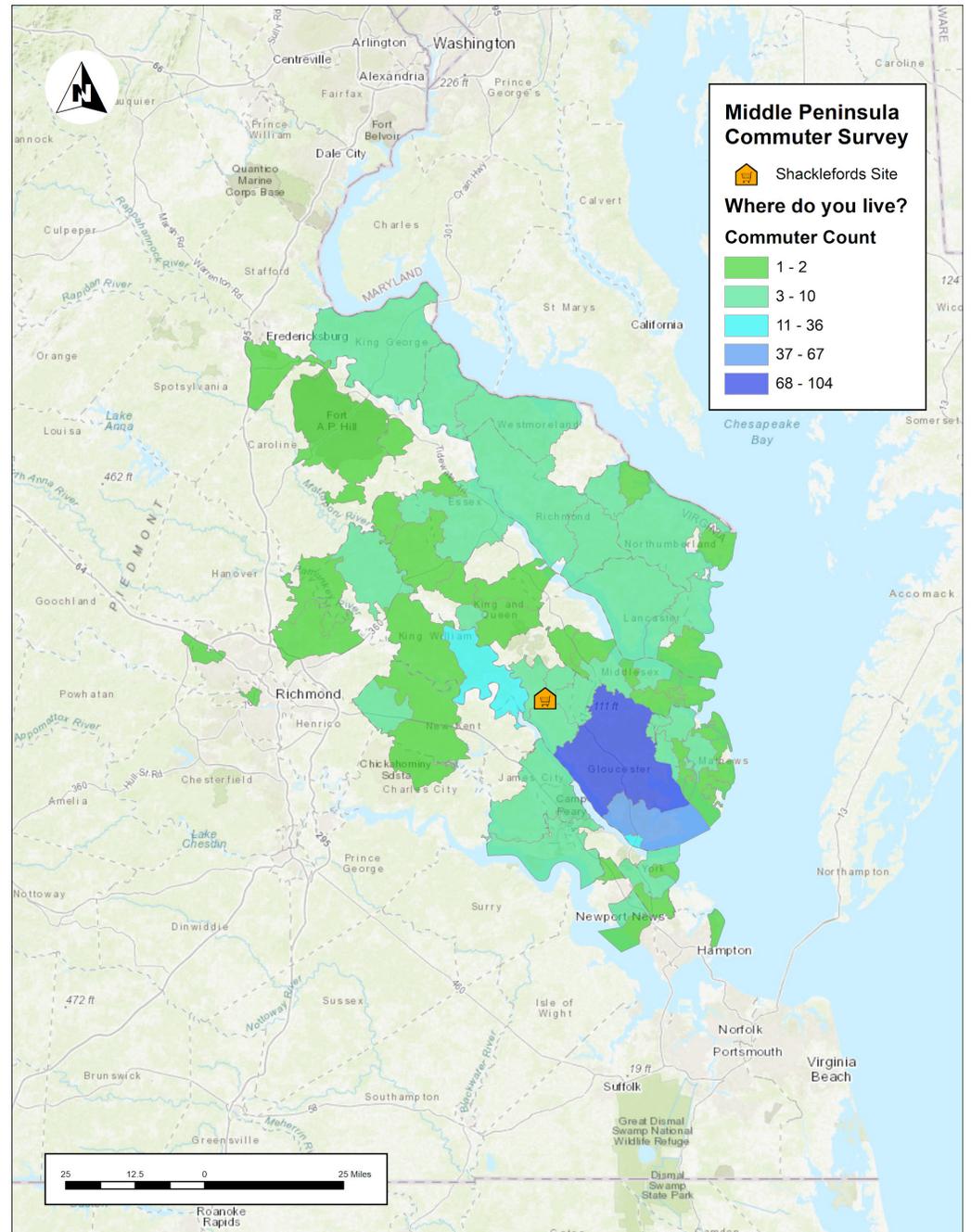


Figure 3) Middle Peninsula Commuter Survey - Where do you live? (Zip code)

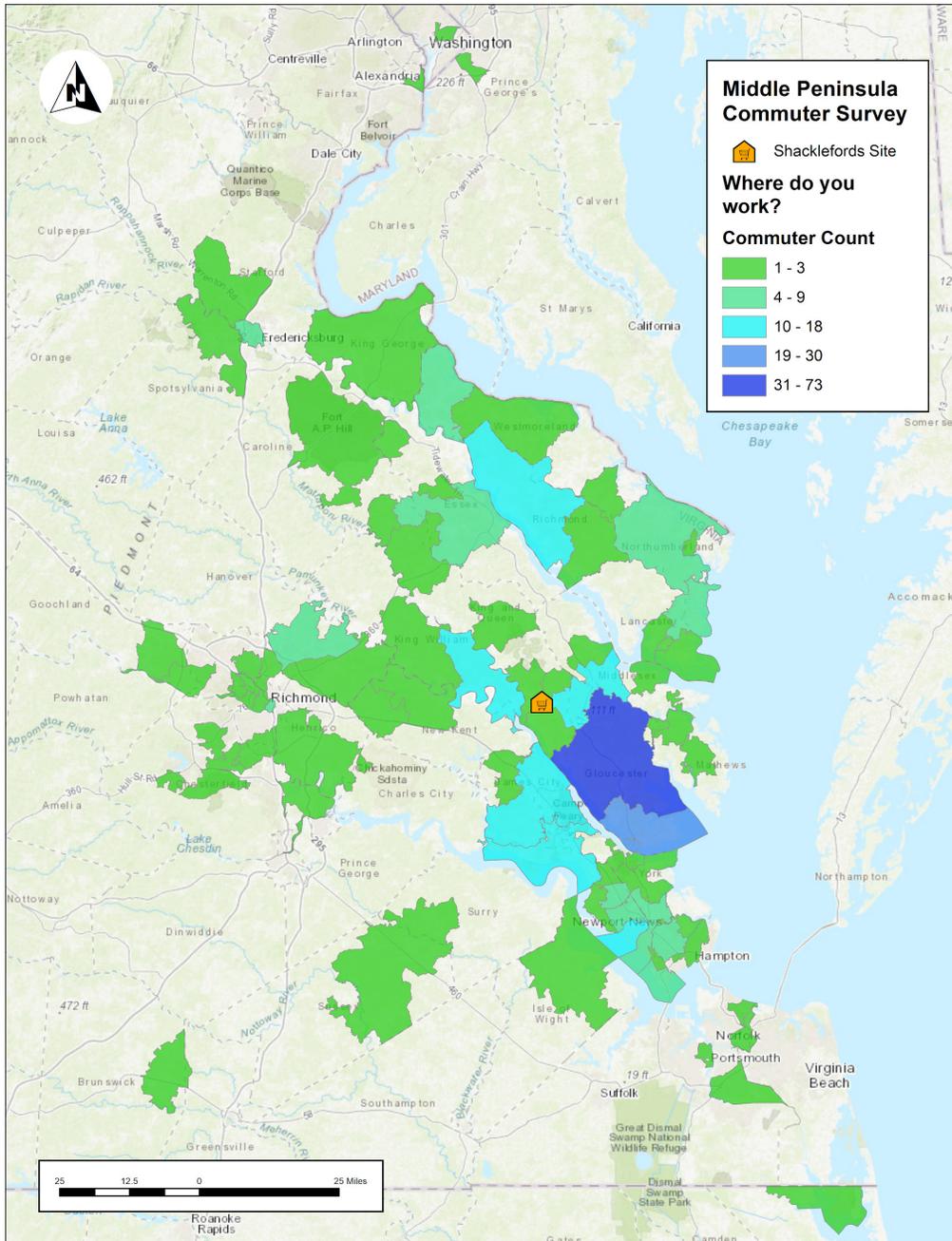


Figure 4) Middle Peninsula Commuter Survey - Where do you work? (Zip code)

The information provided by the commuter survey presents a snapshot of commuter and shopping behavior in the Middle Peninsula region. Of the 404 participants, 191 of them (47%) shop for groceries before returning home. Grocery shopping, for the most part, appears to be greatly tied to locations near employment or conveniently located at major commercial centers - all of which are located outside of King and Queen County. Furthermore, residents are very accustomed to driving long distances for work. Job opportunities are located outside of the county and at distances of over 30 minutes. In addition, the county is approximately 70 miles wide, but only about 10 miles wide on average. Without any towns or significant concentrations of people, driving is the major means of travel to access commercial retail options.

Most of the 404 participants (40%) utilize the Route 17/Coleman Bridge corridor as their main commute to and from work. Of the 404 participants in the survey, only 58 of them (14%) utilize the Route 33 - West Point to I-64 corridor as their main commute to and from work. However, the 14% of commuters that utilize the Route 33 corridor provides an understanding of shopping patterns along this corridor. Forty-eight percent (48%) of those individuals who use the Route 33/West Point Corridor individuals shop for groceries before returning home to the Middle Peninsula. Among the individuals who utilize this corridor, 67% of them do their grocery shopping at a Food Lion location, while 31% of them mentioned Wal-Mart. As far as specific locations, 34% of them mentioned West Point and 22% mentioned Gloucester. Dollar General was only mentioned twice by individuals as a grocery shopping option.

Traffic Patterns

Traffic counts conducted by the Virginia Department of Transportation (VDOT) in 2018 estimate that the intersection at Shacklefords sees on average 15,000 automobiles per day.¹ However, according to the King and Queen County Comprehensive Plan of 2019, there is a temporary population of 26,000+ who travel on Route 360 and Route 33 (Figure 5).² Although this population is only in the county for about 15 minutes, the possibility that this traffic will stay longer than 15 minutes and spend money in the county is high. In addition, there is a significant amount of seasonal traffic that the VDOT traffic counts do not factor in.

During the summer months, Route 33 acts as a major thoroughfare for destination points east of Shacklefords. The Middle Peninsula and Northern Neck are popular tourist and vacation destinations to various river locations. Boating, fishing, and other water-related activities attract a significant amount of visitors and temporary residents to Urbanna, Deltaville, the Northern Neck, and the Eastern Shore. The annual Oyster Festival in Urbanna, for instance, has consistently attracted 50,000-75,000 visitors for more than 60 years.³ An increasing focus on recreational opportunities has provided the region with sizable temporary populations at certain times of the year. Whether it be hunting, fishing, boating, or camping, VDOT traffic counts may not fully capture the full volume of traffic during these seasons.

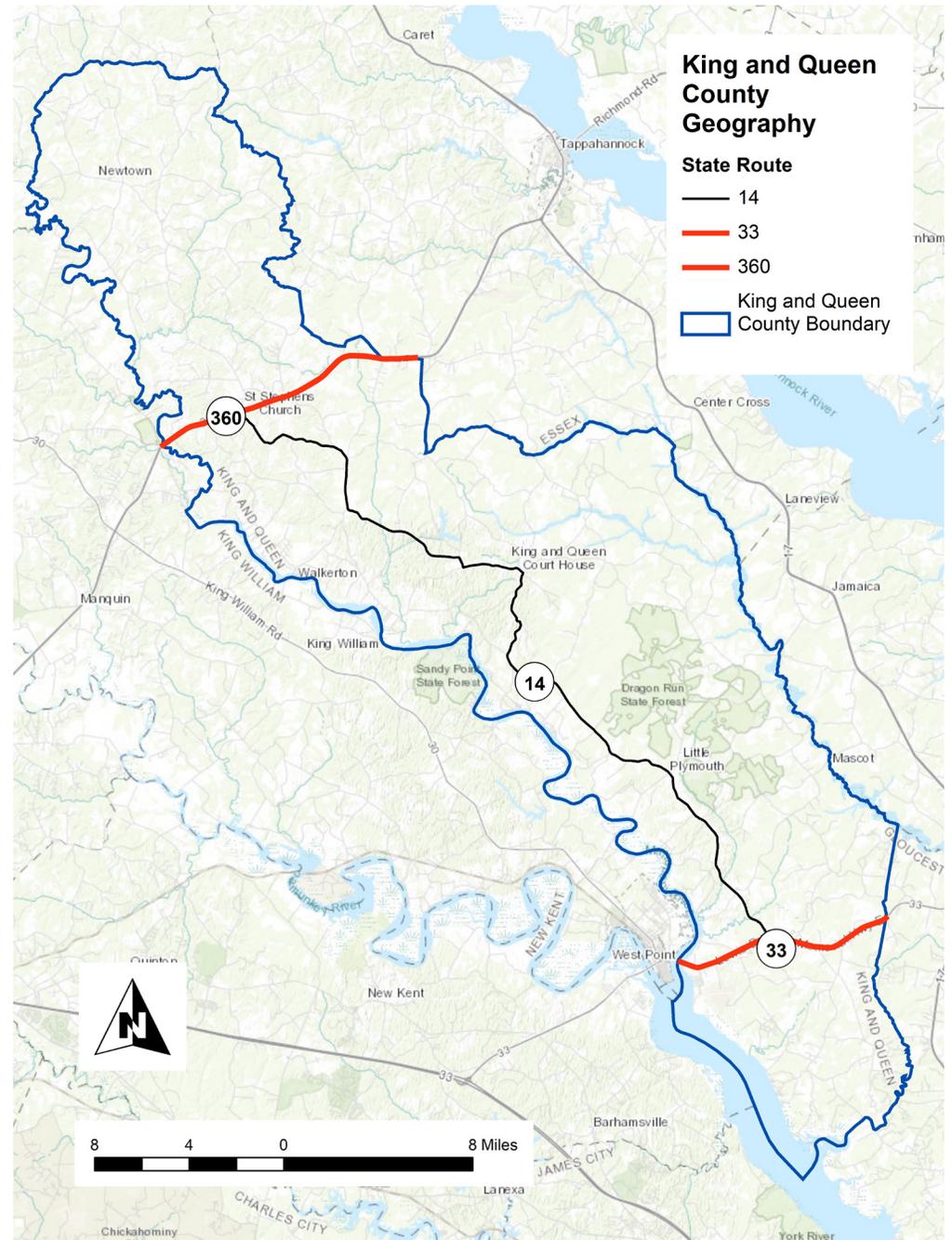


Figure 5) Major Roads within King and Queen County

Trade Areas

After analyzing the previously mentioned commuter survey and traffic volumes, the team created two trade areas for consideration in the development of additional commercial options at Shacklefords. These two trade areas are a convenience trade area, usually defined as the area from which shoppers will travel for simple goods like a gallon of milk, and a community trade area, which encompasses a larger area from the site of development, and is representative of the distances people will travel for a more planned shopping trip. Given the distances people are accustomed to traveling, seen in the longer commutes shown in the Middle Peninsula PDC survey, these areas were determined to be larger than urban market areas.

The convenience trade area, centered at the development site of Shacklefords, covers a smaller area that takes into account competition and consumer shopping for grocery retail. The solid light blue delineation of this boundary (Figure 6) recognizes the barriers that might prevent convenient access to Shacklefords. These barriers can be naturally occurring or based in infrastructure. Interstate 64 to the south provides a soft barrier - consumer habit tells us that the typical shopper will tend not to cross this type of roadway for convenience items. The Dragon Swamp to the east also pulls the convenience trade area in due to the lay of the road network around it - convenience retail options in Saluda and Tappahannock are more attractive from the other side of the swamp. Additionally, as the retail center at Gloucester is accessible to households with easy access to Rt. 17, parts of north central Gloucester are excluded.

An exception to the competitive limits drawn here is West Point and nearer areas of King William County, which are considered, for this analysis, to fall into the same business district given the perception of the grocery options in that vicinity.

The larger community trade area, outlined in a yellow dashed line, is defined using a 30-minute drive time from Shacklefords and encompasses the competitive market for goods and services for most of the Middle Peninsula and to some points further south (Figure 6). The commercial areas of West Point, Gloucester, Urbanna, and the northern suburbs of Williamsburg are included in this larger area. The boundaries of these trade areas were used to gather demographic information for shopping households within the region, which is a common practice for developers planning to pitch their location to potential stores. A more complete analysis is found below in Trade Areas; the general results of the market show that the customer base in these trade areas is nearly identical to the customer to whom Walmart markets itself, meaning potential development would likely need to offer similar pricing and product scope.

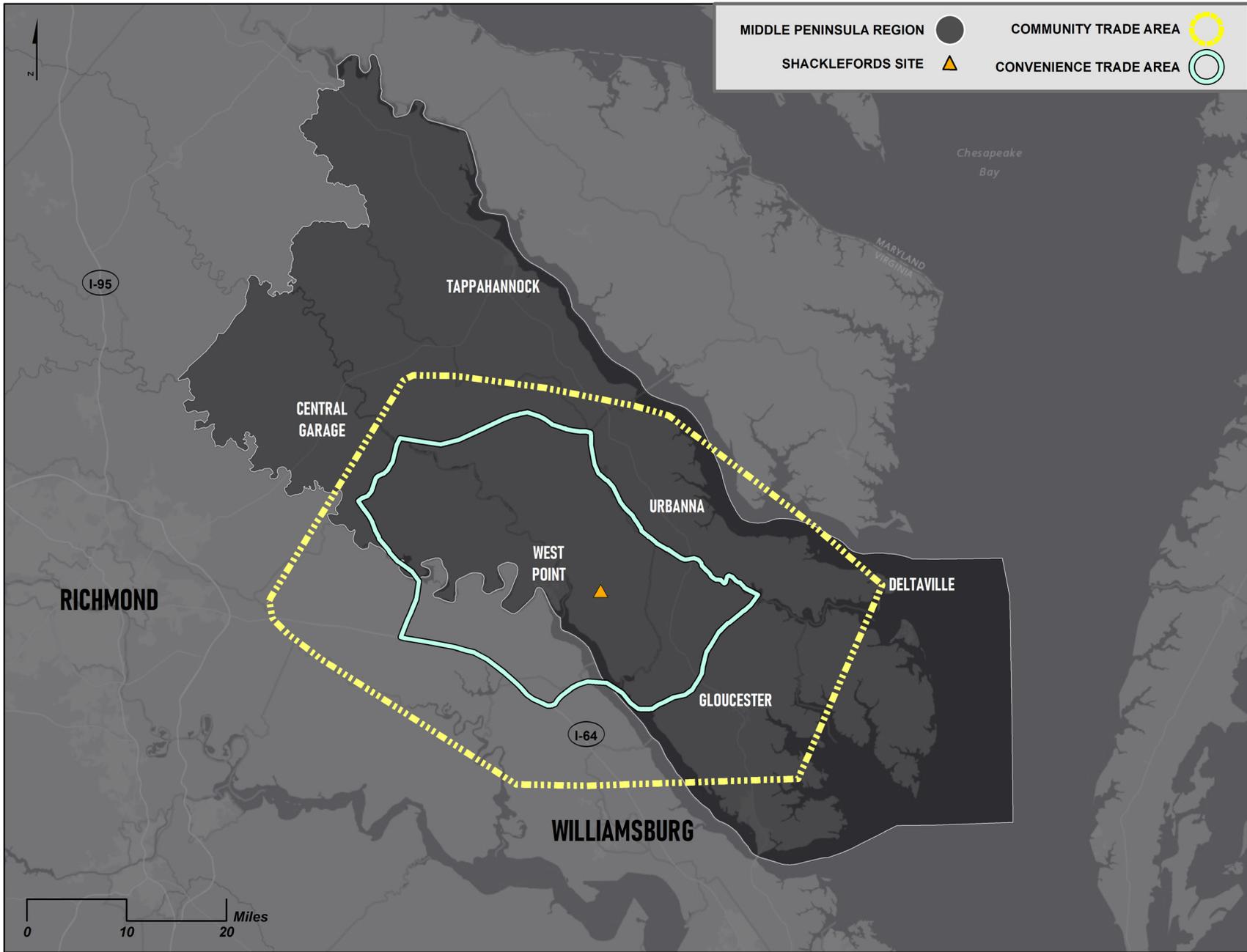


Figure 6) Convenience and Community Trade Areas and the Middle Peninsula Region

Demographic and Commuting Patterns

Utilizing REGIS Online, a commercial real estate data platform, demographic information was obtained for both the convenience and community trade areas. REGIS Online utilizes the weighted block group centroid methodology to aggregate census data for block groups that do not fall entirely within a bounded area. This methodology is employed by REGIS Online in conjunction with demographic data from Applied Geographic Solutions and the U.S. Census Bureau to provide the most up-to-date information.⁴

Compared to the Middle Peninsula Region as a whole, both the convenience and community trade areas are wealthier and younger (Table 1). This is due in large part to the inclusion of portions James City County and Williamsburg in the trade areas. The projected annual growth from 2019 to 2024 for the convenience trade area is estimated at 1.5 percent, while the community trade area is expected to experience a 1.0 percent annual growth rate.

	Estimated Population	Median Household Income	Median Age
Middle Peninsula Region (2018)	91,820	\$60,197	45.90
Convenience Trade Area (2019)	20,448	\$72,375	42.7
Community Trade Area (2019)	51,182	\$73,802	43.4

Table 1) Middle Peninsula and Trade Area Demographics, Source: Middle Peninsula Alliance, 2019; Sites USA, 2019.

When we look specifically at households, we see that there are few differences between the convenience and community trade areas. For the convenience trade area, 29.6 percent of households have children, while for the community trade area 29.9 percent of households have children. The average household size of the convenience trade area is 2.5, whereas for the community trade area it is 2.4. The majority of individuals for both trade areas have had at least some college experience (Table 2).

A large proportion of workers age 16 years or older travel 30 minutes or more for work in both trade areas. Within the convenience trade area, 52.5 percent of workers travel more than 30 minutes, while 50.1 percent of workers within the community trade area travel more than 30 minutes. The working population of both the convenience and community trade areas is largely made up of white collar workers; 56.6 percent for the convenience and 58.3 percent for the community trade area (Table 2).⁵

	Households with Children	Average Household Size	Some College or Above	30 Minute Commute for Work (16 years or older)	White Collar Workers (16 years or older)
Convenience Trade Area	29.6%	2.5	55.3%	52.5%	56.6%
Community Trade Area	29.9%	2.4	59.7%	50.1%	58.3%

Table 2) Trade Area Household and Educational Attainment, Source: Sites USA, 2019.

Middle Peninsula Localities

- Essex
- Gloucester
- King William
- King and Queen
- Mathews
- Middlesex

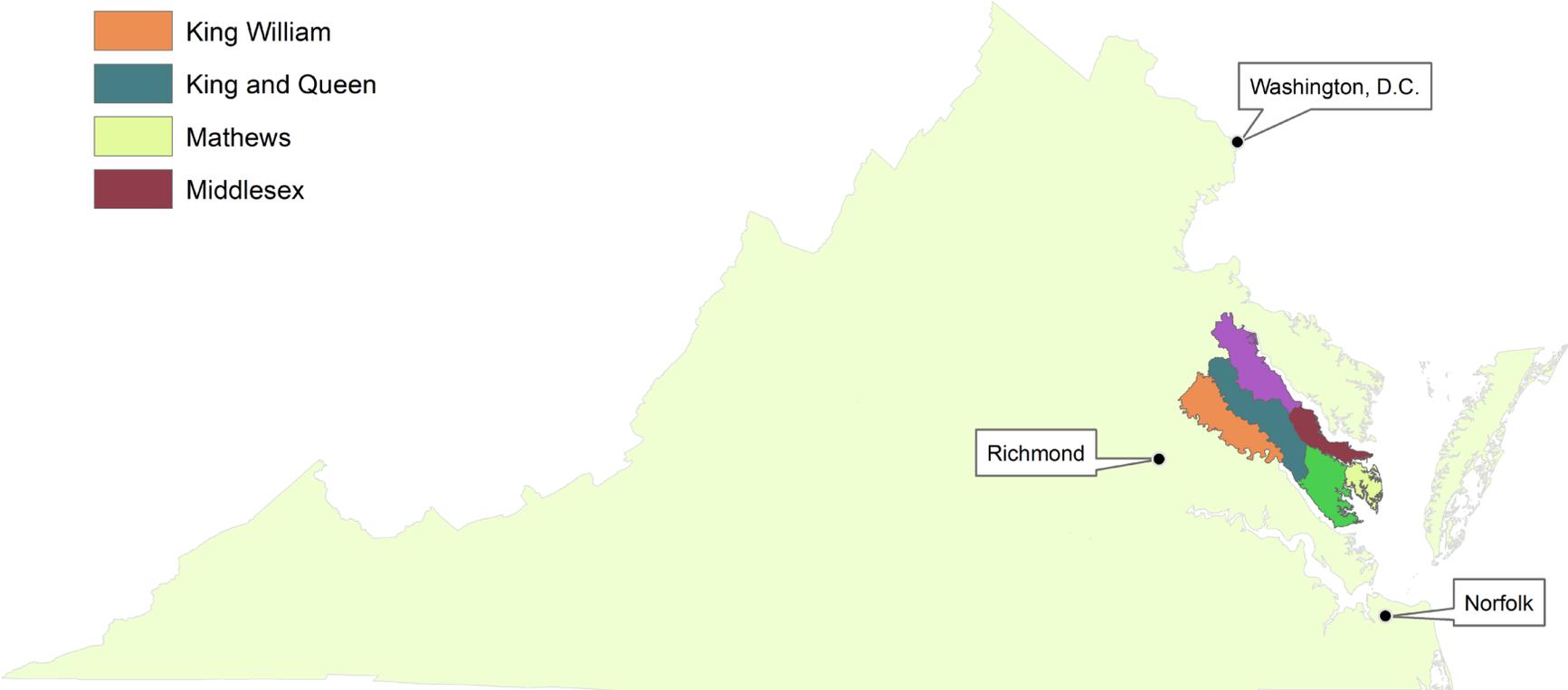


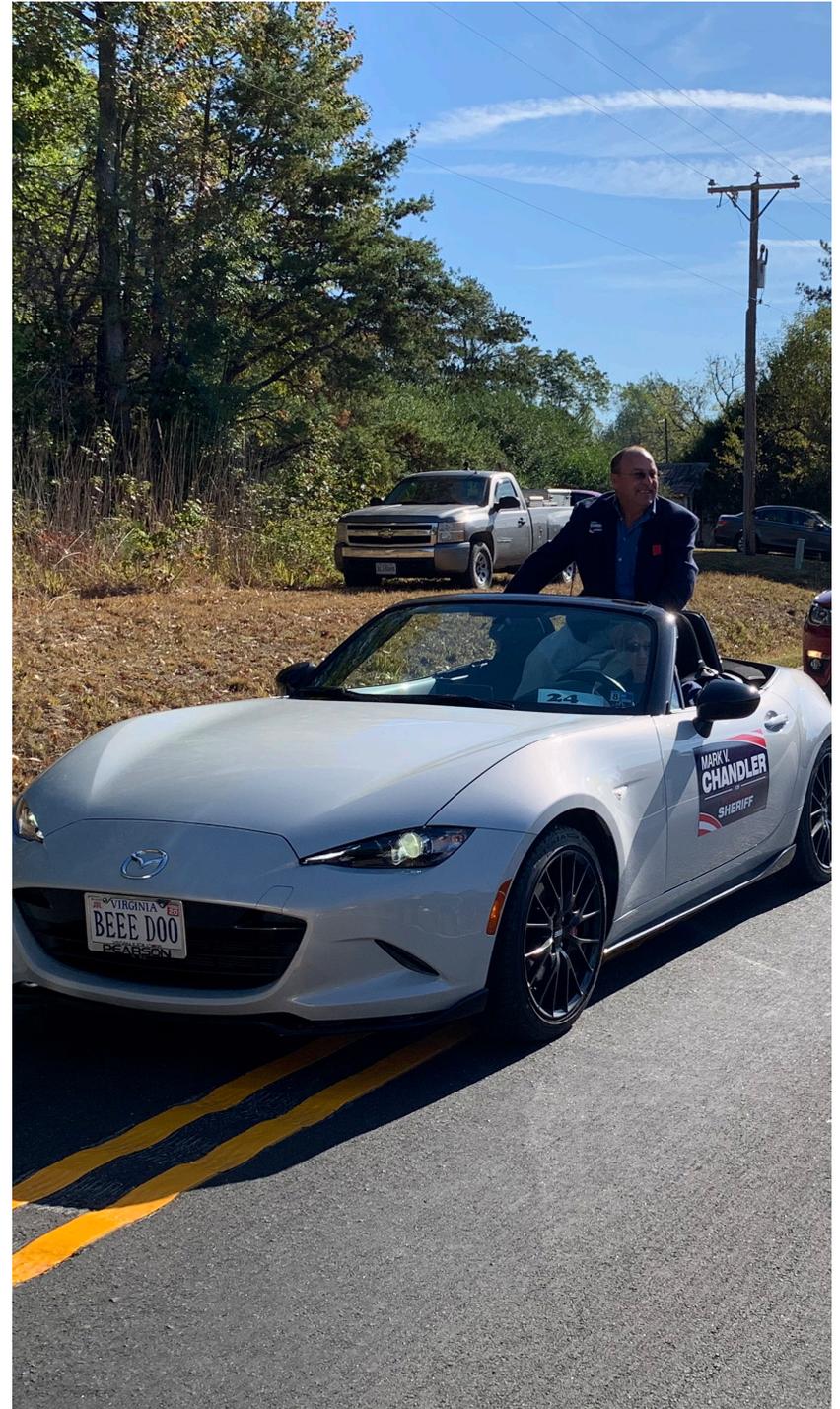
Figure 7) The Middle Peninsula Region

Community Preference Survey

The King and Queen Community Pride Day was held on Saturday, October 19, 2019. This event took place at King and Queen Central High School and was centered around the Royal Tiger Varsity Homecoming football game against West Point High School. Community Pride Day seeks to showcase the opportunities and resources within the county, to provide family-oriented entertainment, and to encourage a sense of community. The event was well-attended with hundreds of residents from the county, as well as friends and family who reside outside of the county.

At the event, members of our team approached attendees and surveyed them about their opinions of grocery and commercial retail options in the county. Those who participated in the survey were asked for the store name and location of where they do the majority of their grocery shopping. They were then asked questions in regard to their satisfaction with that grocery store (e.g. quality of goods, customer service, etc.). The final question asked them to rate the degree of their interest in potential retail options at a site along Route 33 within King and Queen County.

Additionally, our team distributed an online and paper survey to members of the community through the King and Queen County Planning Department. These questions asked about commuter behavior such as where individuals live and work, how frequently they travel on Route 33, and grocery store locations. This survey also asked about general satisfaction with their current grocery store, degree of interest in retail categories, and the importance of several aspects of retail development such as 'Preserving rural character.'







Potential Demand Summary

Summary of Potential Demand

The King and Queen County Planning Department distributed an eleven-question survey via an online link in a County email, and through paper copies of the same questions distributed at Planning Commission meetings. There were extra paper copies handed out during these in-person meetings so that attendees could take copies with them to other community groups there were part of. A total of fifty-three (53) of these long-form surveys, referred to in this report as the 'Online' group, were received by the VCU team.

During the Community Pride Day on October 19, 2019, attendees completed sixty (60) paper surveys with the assistance of the VCU team, which were an abbreviated version of the 'online' survey. These 60 responses are referred to as 'Community Day' surveys, and the full text of both survey instruments and a table listing the full results of the responses discussed in this report are included in Appendix C at the end of this report.

The analysis of these surveys focused on three main areas - where people currently shop for groceries (Figure 8), their satisfaction with their current store (Figure 9), and their interest in potential commercial development options in King and Queen County (Figure 10). There were few differences between responses from the Community Pride Day and online survey; the Online and Community Day survey responses are collected in the Aggregates displayed to the right and on the following page.

Of the 60 Community Day survey responses, 41% mentioned Food Lion as their main grocery store, while 35% mentioned Walmart. West Point was the most frequently mentioned loca-

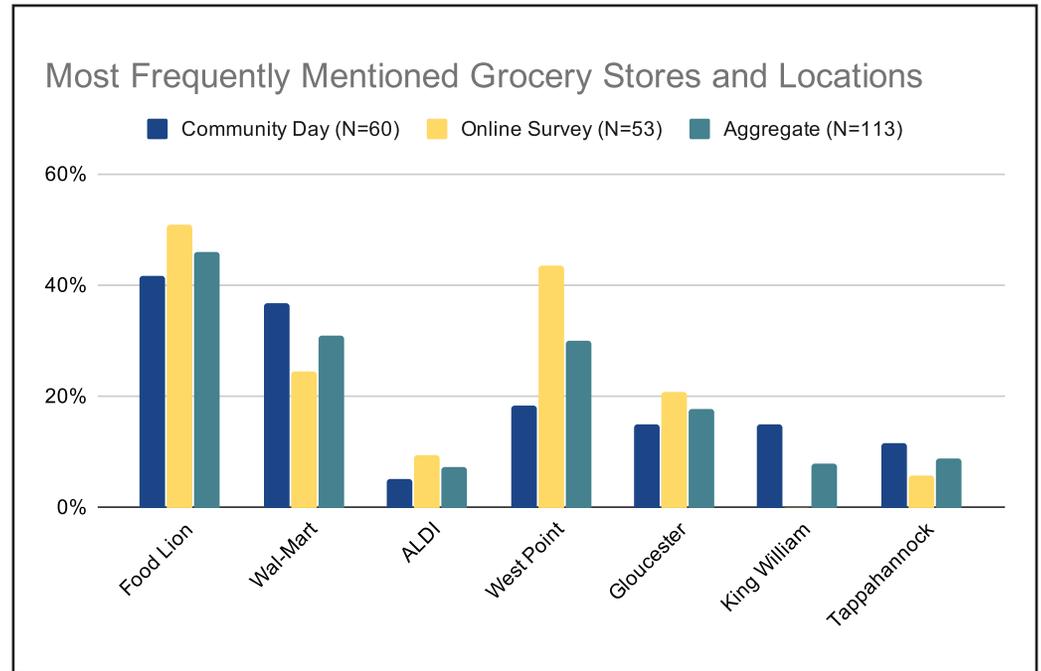


Figure 8) Most Frequently Mentioned from all surveys

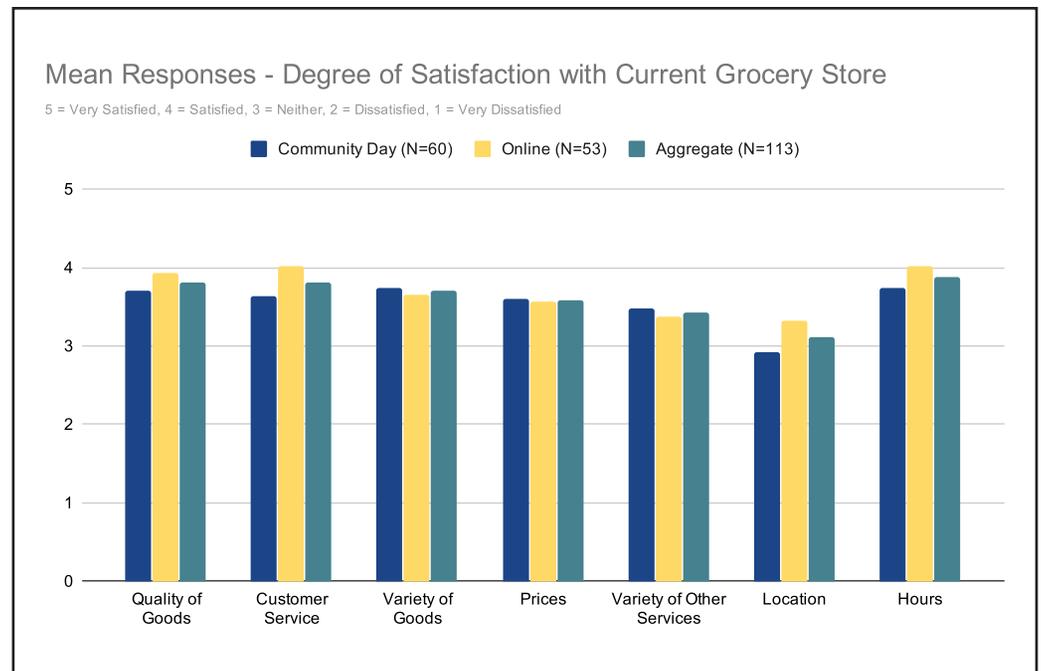


Figure 9) Mean Satisfaction from all surveys

tion with 18%; followed by King William County and Gloucester County at 15% for both. The responses were similar in the 53 Online survey responses, with 51% of those surveyed mentioning Food Lion as their main grocery store and 25% mentioning Walmart. West Point shopping was mentioned by 43% of respondents. Aggregating responses, 31% of those surveyed indicated they shopped for groceries primarily in West Point, and nearly half (46%) indicated they shopped primarily at a Food Lion store.

The average ranking of respondents, referred to here as mean responses (Figure 9), indicated that, for the most part, individuals are only satisfied with their current grocery store, but not very satisfied. In terms of location, individuals are fairly neutral on the location of their store, which may simply be due to them being accustomed to driving long distances in this rural region.

The average, aggregated ranking of responses measuring the degree of interest for all categories of potential retail options falls between “Moderately Interested” to “Very Interested.” Those categories which received a mean response of “Very Interested” are Traditional Grocery Store (4.26) and Restaurant/Bar (4.00), while Medical Services and Fast Food (both 3.81) and Recreation/Entertainment (3.79) have an aggregated result high between “Moderately Interested” and “Very Interested” (Figure 10). While no category had a mean response of “Extremely Interested,” the community engagement led to several informal conversations with attendees that provided valuable insight to what King and Queen County residents want and would support within the county.

Attendees of Community Pride Day were informed that the survey was a cooperative effort between Virginia Commonwealth University students and King and Queen County. Students informed attendees that we, along with the County, were interested in gauging public satisfaction in grocery options, as well as their interest in new commercial retail options within the

Mean Responses - Degree of Interest in Development

5 = Extremely Interested, 4 = Very Interested, 3 = Moderately Interested, 2 = Slightly Interested, 1 = Not at All Interested

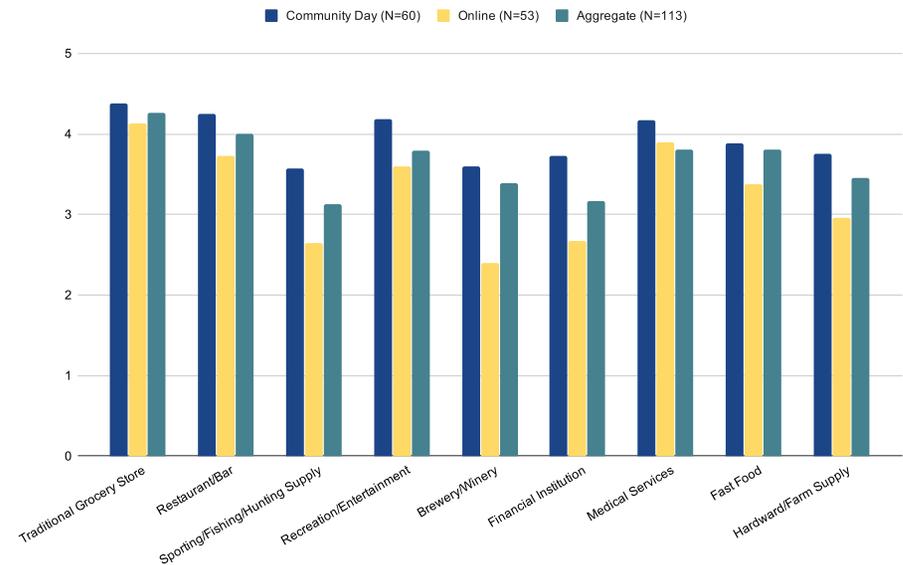


Figure 10) Mean Interest in Commercial Development within King and Queen County



county. When we told community members that we wanted to ask them questions about a potential grocery store option in King and Queen County, their response was often “What grocery store?!”

Many community members were enthusiastic about the prospect of a grocery store within the county. When learning about the survey, many directed their friends to take the survey or speak about what they wanted to see in the county. Almost all community members expressed a strong desire to see any kind of new development within the county. Many referenced a lack of things to do and the necessity of having to leave the region for a desirable restaurant location or any kind of entertainment.

At Community Day, citizens were glad to discuss with the team their current shopping habits and unmet needs. By and large, everyone was quite friendly and approachable, quick to offer a valuable glimpse into their day-to-day lives. The team heard stories of 90-minute commute times, wherein some people are driving to the west end of Richmond or Midlothian for their employment. Some of these residents also find the time to maintain their own farms and gardens. However, we heard from many younger people at Community Day who have since moved away from King and Queen despite growing up there. These people cited a desire for a more convenient lifestyle, with more “stuff to do,” but still placed value on King and Queen and appeared to miss the sense of community. Many of these people claimed that they would return to King and Queen if there were merely more “things to do,” or more convenient options for day-to-day living, including grocery or medical care in closer proximity to the county.





Photo by Will Parson, Chesapeake Bay Program

Potential Supply Options

The information gleaned through surveying and speaking with community members indicates that further development at Shackelfords could be an important opportunity for place-making in King and Queen County. While many community members indicated a strong desire to see development of any kind within the county, the lack of grocery options stands out as a need that could be met by development at this site. With no major food access options within the county, and the pending construction of the King and Queen County Business Center with its associated teleworkers, the site could provide a viable location for several food access options. The Urban Commercial Revitalization class created a working document under a separate cover that collects the following food access options and gives detailed information for each of these typologies, including product offerings and development site considerations (see *Increasing Access to Food: A Comprehensive Report on Food Supply Options*).

- Big Box Supermarkets (Walmart Supercenters)
- Convenience Stores with Gasoline
- Convenience Stores without Gasoline
- Discount Variety Stores
- Farmers Markets
- Food Banks
- Franchise/Alliance Grocery Stores
- General/Country Stores
- Grocery Cooperatives
- Large Supermarkets/Small Format Franchise Stores
- Mobile Markets/Grocery Stores
- Small Format Discount Grocers
- Small Independent Grocery Stores

From this compilation, four grocery or food-related options emerged as the most appropriate for development at the Shackelfords site: 1) Small Format Discount (ex. ALDI), 2) Convenience with Gasoline (ex. Wawa), 3) Small Format Franchise (ex. Walmart Neighborhood Market) and 4) Independent Grocer/Country Store. The following provides a brief overview of each of the four options; for more in-depth information about these four options as well as the remaining store typologies, please refer to *Increasing Access to Food: A Comprehensive Report on Food Supply Options*.



Hochman

Small Format Discount Grocer

Summary

Small-format discount grocers, stores which typically range from 10,000 to 15,000 square feet of sales space, and offer a limited selection which is typically dominated by store-label, generic, or national brand equivalent products, are one of the fastest-growing sectors of grocery markets in the United States.⁶ In a national survey, approximately 19% of grocery shoppers who reported changing the brand of store they used for most of their shopping in the last year had switched to ALDI, the most recognizable and fastest growing brand of small format discount grocers in the US.

This store format offers fresh produce and dry goods, as well as a limited selection of pre-packed meats with no on-site butcher.⁷ Accessory or non-essential services like banking, pharmacy, a deli counter or salad bar which are typically present in a full-service grocery store are not provided.⁸

Development Criteria

The Shacklefords site meets some of the ALDI corporate real estate selection criteria, namely the presence of current zoning which allows commercial retail, and the availability of a pad site with a minimum 2.5 acre size.⁹ However, ALDI's corporate real estate guidelines also specify the desire for a signalized, full access intersection, a dense trade area within three (3) miles, and a daily traffic count of 20,000 cars at a minimum. Due to these constraints, the Shacklefords site is not seen as one that warrants an attempt at development with ALDI.

Shacklefords Context

Despite the fact that ALDI may not be a feasible option for the Shacklefords site, survey participants in both the Community Day event and the longer-form survey distributed by King and Queen County noted that they shop for groceries at ALDI stores located in Gloucester or Mechanicsville.

The store's small footprint makes a development of similar size feasible within the Shacklefords development hub, and the model of a smaller, limited stock store does seem to fit many of the preferences of the King and Queen community. ALDI also limits shopping hours to what they call prime shopping, which eliminates concerns over late-night traffic and noise that might otherwise be raised in a more rural community with a traditional grocer or convenience store's 24-hour operations. These aspects of a possible grocery development--limited development footprint, the availability of needed groceries and household items, and potentially limited hours--are tied in to the final four recommendations for the Shacklefords site.



Photo by Mike Mozart





Photo by Montgomery County Planning Commission (Maryland)



Convenience Store with Gasoline

Summary

Many in the community who were surveyed suggested that a Wawa or a Sheetz would likely do well in the project area, indicating a preference for the convenience and reliability that these stores provide in offering 24/7 access to food and other necessities. While gas stations currently exist along the Route 33 corridor, there exists a potential opportunity at the Shacklefords site for this model given the heavy commuter base utilizing the corridor.

Development Considerations

Wawa's site requirements include two (2) acres of site area to accommodate a retail footprint of 4,000 to 6,000 square feet, eight (8) "multiproduct fuel dispensers," and 50 to 60 parking spaces. Moreover, they prefer a site with traffic counts of 25,000 vehicles per day situated at least at a signalized "T" intersection, but preferably at a full 4-way signalized intersection.¹⁰ While the Shacklefords project area does allow for all of the physical characteristics Wawa prefers, it does not meet the preferred minimum traffic count of 25,000 vehicles per day, nor does it currently provide a signalized intersection of any kind.

Shacklefords Context

In areas without interstate access, gas stations often locate between primarily traveled local/state roads. It would make sense, then, to have a gas station directly at or near the intersection of Routes 14 and 33 at Shacklefords. Again, the lower density and traffic counts might limit a corporate chain from locating here, however many who were surveyed at the Community Day held at the high school indicated that they enjoyed having a similar service provided at the shuttered store on Route 14 across from Central High School. This further indicates the potential demand for this supply type.

Small Format Franchise Store

Summary

Several national chains, including Walmart and Kroger, are running trials of smaller format stores in light of the relative success of retailers such as ALDI and Trader Joe's. These stores are similar in structure to ALDI - smaller in scale than their traditional operations, a more limited set of products, and, often, shorter hours of operations. Both Kroger and Walmart maintain non-essential services at these test stores such as deli counters or prepared meals to go and banking.

Development Criteria

Kroger's test stores are primarily conversions and expansions of their existing holdings of Turkey Hill Minit Markets, but Walmart has been selecting new sites for these stores, called Neighborhood Markets, within the greater Richmond region. These sites have slightly larger size requirements than ALDI, averaging double the store square footage and, for Walmart, preferring a larger parking footprint. Overall, the 4-6 acre site needed for development could be accommodated at Shacklefords.

Shacklefords Context

In addition to a desire for grocery shopping within the county, residents indicated in the distributed survey an interest in supporting secondary services at this development site, including a gas station and fast-casual food services. Walmart Neighborhood Markets typically feature several gas pumps and offer prepared meals as well. The demographic profile of Walmart's customers is well-matched to King and Queen County and the commuting traffic, but a Neighborhood Market would likely not satisfy the demand for a community social hub due to the style of development Walmart pursues.



Photo by Paul Sableman





Photo by Dion Hinchcliffe



Small Independent Grocer/Country Store

Summary

Independent supermarkets are defined as supermarkets that operate ten or fewer stores, and by the nature of their smaller operations, these stores have the ability to be in close contact with their shoppers. Independent markets may provide fresh produce and dry goods, as well as non-essential services like banking or pharmacy. Country stores are also typically operated as independent markets, but may offer more ‘experiential’ shopping centered around an existing historic building, local products, or a mixed product offering that spans food to outdoor clothing. Many country store locations throughout Virginia serve both local residents and seasonal tourists. By providing grocery items, prepared food, novelty items, recreational supplies, and other items, country stores meet diverse needs where options are limited.

Development Criteria

Given the breadth of options for independent grocers or country stores, criteria for the development of a physical site would be best determined by partnering directly with the future owner or operator of such a store. The most important criterion here is finding a development team willing to work throughout the design and construction of a new store building, and later to operate the store, without the financial backing that a business entity like Wawa, ALDI, or Walmart already have.

Beyond the development team’s requirements, nearby markets--Deltaville Market (Great Valu) in Deltaville, Urbanna Market (IGA) in Urbanna, and Watts & Sons in Millers Tavern--have marketed themselves not only to year-round residents and commuters, but also to the seasonal tourism industry in product mix over the warmer months. Most of these independent grocers have ties to their local communities, and an owner/operator in King and Queen County could be a good option for development.

Shacklefords Context

King and Queen County shoppers demonstrate a strong sense of community and a willingness to support businesses choosing to locate in their area, as seen by the outsize support of Dollar General. An independently owned and operated grocery market or country store would have the flexibility to meet the desire of the community to have local programming and a space to gather and meet socially, in addition to providing the county with food access.

Currently, three independent grocers exist nearby--a Deltaville Market (Great Valu) in Deltaville, Urbanna Market (IGA) in Urbanna, and Watts & Sons in Millers Tavern, which illustrate that places of similar density and demographics can support a storefront; one of these nearby owners may consider expanding into a second market in Shacklefords. Additional options for owner/operators might be solicited from the West Point Chamber of Commerce, which serves King and Queen County.



Photo by Will Parson, Chesapeake Bay Program

Alternative Development Scenarios

After analyzing the information gathered from the King and Queen Community and the relevant portions of the Commuter Survey from the Middle Peninsula PDC, and choosing from the 13 types of food access options studied four options that seem to fit the King and Queen context, the team has developed four alternative development scenarios. Two envision development beginning directly along Route 33 road frontage, and two which would develop properties further from the road in tandem with commercial buildings. These four options marry the unique rural development opportunity offered by King and Queen County with sustainable and marketable business potential.

Development Scenario #1: “Agrihood: Community Cultivation”



Figure 11) Norris, Matthew. Agrihoods: Cultivating Best Practices. Washington, D.C.:Urban Land Institute, 2018.

Understanding the desire to combine smart growth and placemaking with a preservation of rural heritage in King and Queen County, one potential option may be to attract “Agrihood” development to the Shackelfords site. Building on the strong sense of community found in King and Queen, and focusing it into an intentional development such as an Agrihood, could appeal to current residents of King and Queen, and also can elevate the site as a unique place in the Middle Peninsula and greater Central Virginia.

Agrihoods, as in “Agricultural Neighborhoods,” are rising in popularity across the country. The Urban Land Institute, a research-based networking community focused on garnering best practices in urban, suburban, and rural development, recently issued a report titled “Agrihoods: Cultivating Best Practices,” which outlines the market support for this development model, as well as anecdotal successes.¹¹

These communities are inherently community-based, with many residents choosing to participate in community gardens, activities, and events. This energy is created by the physical development; where golf-course communities and country clubs may have people more interested in golfing, tennis, and swimming, Agrihoods may have more people interested in growing their own food and doing so at a community level. Per the ULI report, 73% of U.S. residents list access to fresh, healthy foods as a high or top priority when deciding where to live. While an Agrihood cannot reasonably supply all of the food needs for its residents, it can shape eating habits and nutritional education for the better, and create a community brand that may attract positive development external to the Agrihood.¹²

One nearby example is the Chickahominy Falls development in a suburban area of Hanover County. This development, now in its beginning stages, is an age-restricted 55+ community that offers an opportunity for residents to age-in-place, with all homes being universally designed to allow for varying levels of physical mobility. The major advantage of an Agrihood in this market is the sense of community that the Agrihood provides along with the physical activity involved in the community gardening program.



Development Scenario #2: The Doctor is Online"

Figure 12) Conceptual Design for Planned Unit Development with Medical and Grocery Anchors

Rural access to healthcare is a significant challenge due to the dearth of doctors in rural areas. Rural residents are increasingly being forced to drive greater distances to access regular and critical healthcare services.¹³ The Middle Peninsula region is not exempt from this lack of access to healthcare and wellness services. The aforementioned survey responses and conversations with community members revealed a strong interest in having medical services such as an urgent care center or pharmacy located at the Shacklefords site. This desire among residents for healthcare services echoes a pressing need in rural America. With 17.1 percent of its population over the age of 65, King and Queen County has a significant elderly population compared to Virginia's 12.2 percent.¹⁴ In addition, the aging baby boomer population in King and Queen will lead to increased demands in elderly care over the next twenty years. The Shacklefords site has the potential to meet a regional need should it attract healthcare facilities to this location.

The Bay Rivers Telehealth Alliance (BRTA) is a non-profit that serves a 12-county area, including King and Queen County, and seeks to provide the low-density Middle Peninsula, Northern Neck, and Eastern Shore communities with a reliable and convenient connection to healthcare via telehealth programs.¹⁵ Currently the program operates out of some of the school districts within those 12 counties, but does not serve King and Queen County schools.¹⁶ BRTA's offices are located within the Riverside Tappahannock Hospital.¹⁷

Based upon the survey data, a planned unit development with a healthcare-oriented anchor would be widely supported by the community. An expansion of medical professionals into an office at Shacklefords could offer a more convenient on-site care location for residents within the BRTA's service area, and the practice could be supported by partnering with BRTA with some referral telehealth work. In addition, a small grocery store as an anchor could draw more customers to the development. Smaller retail spaces could be utilized by a multitude of small businesses. Figure 12) offers a conceptual design for what a planned unit development at the site could look like.



Photo by Virginia Retail

Development Scenario #3: "Get your Groceries on Route 33"

Many comments from the community centered on their feelings that the larger area is under-served with only a single full-service grocery retailer between West Point and Shackelfords. Some respondents to the surveys stated that the Food Lion on King William Road north of West Point does not meet their needs.

New development in Shackelfords is an opportunity to improve the choice of grocery options. Similar towns have shown an ability to support multiple small markets. For example, Urbanna, with fewer than 500 permanent residents, supports the Urbanna Market, an IGA affiliated independent grocer in its downtown, while along the town's terminus on Route 17 at an even less-populous junction, Saluda, a full-service Food Lion grocery store pulls customers from the approximately 7,200 daily vehicle trips on that stretch of road.

Retail success has recent precedent in the immediate area with the aforementioned Dollar General location to the east, and this development scenario builds on the theme of Shackelfords as an emerging retail center through the establishment of a grocery anchor. The Shackelfords site, with a larger local population and double the traffic count along Route 33 than is present at Saluda, indicates that there is room for another grocery anchor in the area, especially with the potential to pull shoppers from West Point to the west. Two retailers in particular have excelled in similar markets.

Weis Markets (Traditional Grocery)

Weis entered the Virginia market in 2016 by acquiring 11 Food Lion locations near Fredericksburg and Culpeper. With an established supply chain already providing for stores 60 minutes apart in that market, extending this supply delivery an additional half-hour would open Weis into the Shackelfords market. While Weis' footprint in Virginia is mostly suburban in their home base of Pennsylvania stores are in operation at more rural locations.



Weis Markets, while comparable in price to Food Lion, are noted for their in-store ‘beer-cafe’ concepts, which Pennsylvania nightlife and entertainment magazine *Fly* described as “redefining the Pennsylvania grocery store experience.”¹⁸ Even without a ‘beer-cafe’, a full service grocery store under a different banner would provide market allure, enticing consumers from outside the convenience trade area who are looking for a different option yet who prefer shopping at a traditional full service grocery.

Shopper’s Value Foods (Unique Discount Grocery)

Shopper’s Value Foods is a brand offered by wholesaler Supervalu. Goods are sold at wholesale cost, and a 10% profit margin is added as a separate line-item at the register. In Virginia a single franchise partner, Shopper’s Value Foods Virginia LLC, operates stores in the towns of Louisa, Kenbridge, South Boston and Luray. Recently, one Shopper’s Value opened at Highland Springs in eastern Henrico County. A distribution center in Hanover County supplies the Highland Springs store and is well-positioned to supply additional store locations, such as one at Shacklefords. Shopper’s Value has had success in competing with Walmart and Food Lion in rural Virginia, which makes Shacklefords a potentially compelling site choice for their expansion.



Development Scenario #4: "The Trailhead"

Figure 13) Conceptual Design for "Trailhead General Store"

Located at the intersection of The Trail and Route 33, a country store concept we call The Trailhead could serve as the beginning and end of resident and visitor commutes. Furthermore, a country store could be a major community hub within the county. Throughout rural communities, the country store has historically served as a central location for community gatherings, community services, and an assortment of items ranging from food to garden supplies to clothing. Many country stores also serve the needs of regional tourists who are not only looking for food items, but also for outdoor recreation supplies for fishing and hunting, souvenirs, and other unique items. While several country stores within the county have closed, a country store located on Route 33 that provides additional services such as a restaurant and products geared towards seasonal visitors could be quite successful.

For residents who live along The Trail and commute via Route 33, The Trailhead could serve as a major stop for coffee and breakfast items before going to work, as well as a stop for a drinks and dinner on the way back home. If development were to occur at the northeast corner of the site's intersection, the post office that is currently located at this corner could move into the country store to further lend to the feel of a typical country store (Figure 13). The co-location of prepared food, postal service, and grocery items would provide a steady stream of customers at various times throughout the day.

Meanwhile, for seasonal visitors to the region, The Trailhead could be a central location to pick up supplies and unique regional items on their way to riverhomes and other destinations to the east of Shacklefords such as Urbanna, Deltaville, the Northern Neck, and the Eastern Shore.



While typically housed within historic buildings that once served as a country store or other retail, country stores located in newly constructed buildings do exist. In addition, a country store concept could be built-to-suit to allow for a concept that is unique and builds upon the rural character of King and Queen County. A unique building concept with Route 33 frontage would attract attention from the thousands of commuters who travel along the corridor each day, as opposed to traditional box retail development. Vintage gas station signage and non-working gas pumps could add to the look and feel of a traditional country store.

King and Queen County lacks a diverse assortment of retail options. The Dollar General offers a diverse product line at affordable prices, however, they do not meet the needs of all. The Trailhead could fill the gap by providing higher quality products, as well as products not stocked at nearby stores. Seasonal traffic spikes could be a boon to a country store concept that also stocks high-end goods such as fine wines, recreational equipment, fresh meats, and souvenir items.

An attached restaurant concept that serves alcohol and provides entertainment options (i.e. sports viewing) is highly recommended. Many attendees of community day mentioned a lack of things to do within the county and region. Also, survey responses reflected significant interest in a restaurant with a bar. Missing from the county is a daily “third place,” a place other than home and work where one can socialize with others. Based upon views expressed by community members, a concept that incorporated food and beverage with a social aspect would find significant support. An owner-operator with ties to the region would gain additional support from the community, as well as provide crucial knowledge to what residents and visitors desire in a store and restaurant concept. Leveraging the local seafood economy would provide a much desired food option among residents, and would also serve to highlight and support local industries.



Photo by Virginia Department of Transportation



Photo by Dr. Jimmy Emerson, DVM

Conclusion

Anchored by the fully funded development of a telecommute center and new offices for the Middle Peninsula Planning District Commission, and supported by the already operational Dragon Run Brewing, the Shacklefords site provides an ideal opportunity to bring retail operations into the county. Already identified as a commercial expansion node along Route 33 in the King and Queen County Comprehensive Plan, well-considered development at Shacklefords could meet with the community's expressed needs while fitting with their desire for most of the county to remain rural. Further, based upon the assessment of current grocery market trends and the identified trade areas, each of these developments should be able to find a viable base of customer support.

The four proposed development scenarios each focus on a slightly different aspect of King and Queen county's strengths as a community and as a locality.

“Agrihood: Community Cultivation” makes a modern version of an agricultural community accessible to a variety of residents, and provides a center for community gathering.

“The Doctor is Online” centers around the expansion of medical services through both traditional medical services and new technologies allowing expanded access in rural areas.

“Get Your Groceries on Route 33” leverages King and Queen county's community loyalty, providing desired groceries and ancillary services from an owner/operator with a King and Queen connection.

“The Trailhead” capitalizes on the increased exposure King and Queen county receives from tourism travel through the corridor, and creates an additional space for residents to eat out within their own community.

In conclusion, it is our hope that these high-level, creative development scenarios may provide King and Queen County and the Middle Peninsula Planning District Commission the necessary information to begin tailoring development plans to encourage local private development towards a sustainable and long-term improvement at the Shacklefords site.

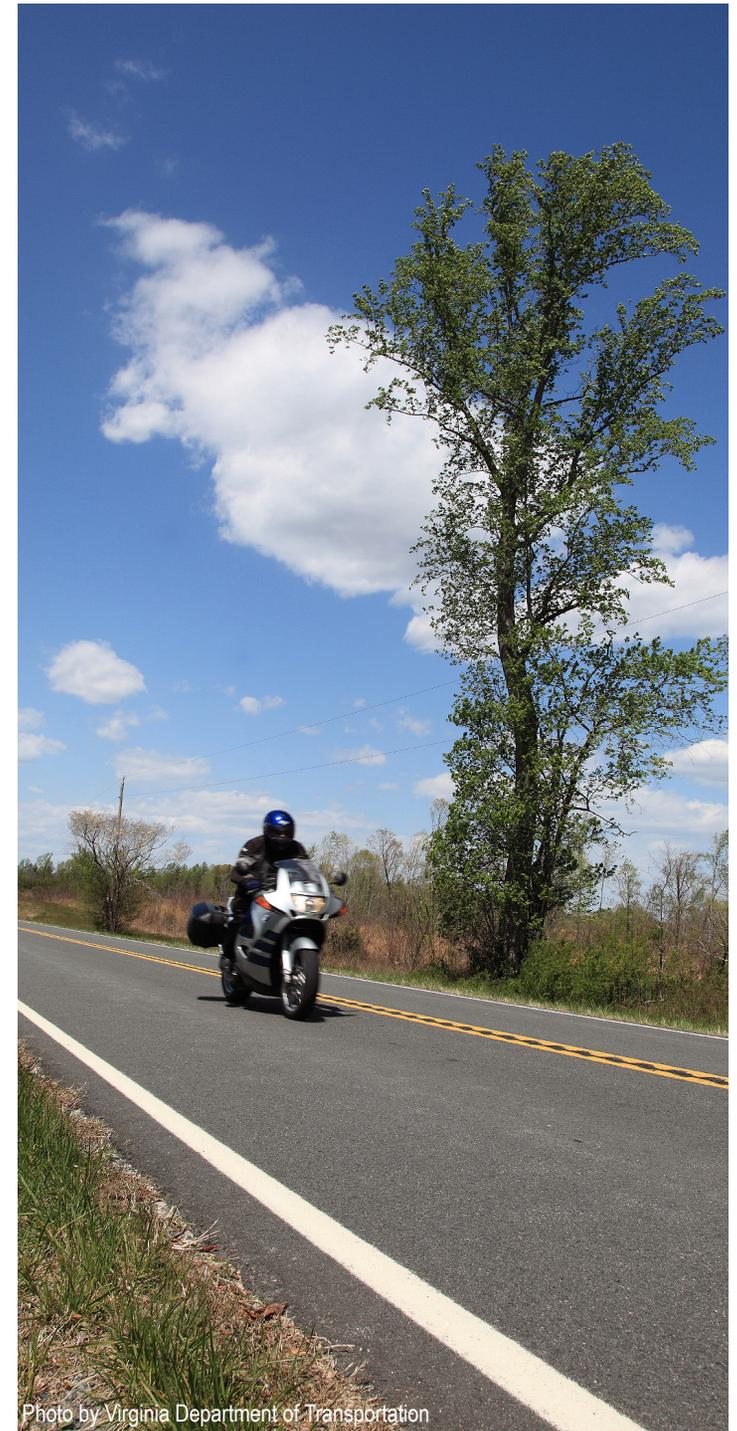


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Appendix A

Online Survey - Paper Version

Route 33 Survey

In cooperation with King & Queen County and the Middle Peninsula Planning District Commission, graduate students enrolled in the Commercial Revitalization course at Virginia Commonwealth University are learning about food access and retail opportunities along Route 33 within King & Queen County. Our goal is to provide county and regional officials with recommendations for commercial development along this major corridor.

The thoughts and opinions of those who live near and travel on Route 33 are critical to our work. The following survey seeks to gain information about your travel and shopping habits. This survey is voluntary and you may choose not to answer any question. This survey is anonymous, however; and we would appreciate your honesty so that the information we provide to the county reflects your interests.

1. **What is your home zip code? Please provide the 5-digit zip code below.**

2. **What is your current employment status? Please circle one.**

- Full-time
- Part-time
- Retired
- Unemployed - Looking for work
- Unemployed - Not looking for work

3. **Do you commute for work? Please circle one.**

- Yes
- No
- Do not work

4. **What is your work zip code? Please provide the 5-digit zip code below.**

5. **How would you describe your occupation? Please provide your response below:**

6. **How frequently do you travel on Route 33? Please circle one.**

- Everyday
- Weekly
- Twice a month
- Once a month
- Once a year
- Never
- Don't Know

7. **Currently, for what reason are you most likely to stop along Route 33? Please circle one.**

- Grocery shopping
- Fueling vehicle
- Attending religious services
- Collecting mail
- Convenience shopping
- Visiting family or friends
- Other (Please indicate below what that other reason is)

■ _____

8. **Where do you currently do the majority of your grocery shopping? Please provide the name and location of that grocery store below:**

■ Name: _____

■ Location: _____

9. How satisfied are you with the following aspects of your current grocery store? For each prompt in the first column, please place an [X] for the one response that most reflects your satisfaction level:

	Very Satisfied	Satisfied	Neither	Dissatisfied	Very Dissatisfied	Don't Know/No Opinion
Quality of goods						
Customer service						
Variety of goods						
Prices						
Variety of other services						
Location						
Hours						

10. How important would you rate the following to you in a commercial development along Route 33. For each prompt in the first column, please place an [X] for the one response that most reflects your importance rating:

	Extremely Important	Very Important	Moderately Important	Slightly Important	Not at all important	Don't Know/No Opinion
Supporting local economy (jobs, businesses, etc.)						
Supporting local community (community meeting space, events for county/region, etc)						
Providing access to food						
Preserving rural character						
Providing entertainment opportunities						
New housing opportunities						

11. What new goods and services would you most be interested in being located on Route 33 within King & Queen County? For each prompt in the first column, please place an [X] for the one response that most reflects your interest level:

	Extremely Interested	Very Interested	Moderately Interested	Slightly Interested	Not at All Interested	Don't Know/No Opinion
Traditional grocery store						
Restaurant/Bar						
Sporting/Hunting/ Fishing Supply						
Specialty food (seafood, butcher, etc.)						
Recreation/Entertainment (theater, live-music venue, etc.)						
Brewery/Winery						
Financial Institutions (bank, credit union)						
Medical services (pharmacy, urgent care)						
Fast food						
Hardware/Farm supply						

12. How often do you go out to eat? Please circle one.

- Everyday
- 1-2 times a week
- Once a month
- Once every few months
- Once a year
- Never
- Don't Know

13. What age range best describes you? Please circle one.

- Under 18 years old
- 18-24 years old
- 25-34 years old
- 35-44 years old
- 45-54 years old
- 55-64 years old
- 65-74 years old
- 75 years or older

Appendix B

Community Day Survey

Route 33 Survey

1. Where do you currently do the majority of your grocery shopping? Name: _____
 Location: _____

2. How SATISFIED are you with the following aspects of your current grocery store?

	Very Satisfied	Satisfied	Neither	Dissatisfied	Very Dissatisfied	No Opinion
Quality of goods						
Customer service						
Variety of goods						
Prices						
Variety of other services						
Location						
Hours						

3. What new goods and services would you most be INTERESTED in being located on Route 33 within King & Queen County?

	Extremely Interested	Very Interested	Moderately Interested	Slightly Interested	Not at All Interested	No Opinion
Traditional grocery store						
Restaurant/Bar						
Sporting/Hunting/Fishing Supply						
Specialty food (seafood, butcher, etc.)						
Recreation/Entertainment (theater, live-music venue, etc.)						
Brewery/Winery						
Financial Institutions (bank, credit union)						
Medical services (pharmacy, urgent care)						
Fast food						
Hardware/Farm supply						

Appendix C

Community Day Survey

Mean responses for satisfaction with current grocery store, where 5 = Very Satisfied, 4 = Satisfied, 3 = Neither, 2 = Dissatisfied, and 1 = Very Dissatisfied

	Community Day (N=60)	Online Survey (N=53)	Aggregate (N=113)
Quality of goods	3.71	3.94	3.81
Customer service	3.64	4.02	3.81
Variety of goods	3.74	3.65	3.70
Prices	3.60	3.57	3.59
Variety of other services	3.47	3.38	3.43
Location	2.93	3.32	3.11
Hours	3.74	4.02	3.88

Mean responses for interest in commercial development within King and Queen County, where 5 = Extremely Interested, 4 = Very Interested, 3 = Moderately Interested, 2 = Slightly Interested, and 1 = Not at All Interested

	Community Day (N=60)	Online Survey (N=53)	Aggregate (N=113)
Traditional grocery store	4.38	4.13	4.26
Restaurant/Bar	4.25	3.73	4.00
Sporting/Hunting/Fishing Supply	3.58	2.65	3.13
Recreation/Entertainment	4.19	3.60	3.79
Brewery/Winery	3.60	2.40	3.39
Financial Institution	3.72	2.67	3.16
Medical services	4.17	3.90	3.81
Fast Food	3.88	3.38	3.81
Hardware/Farm supply	3.76	2.96	3.46

Mean responses for importance in commercial development within King and Queen County, where 5 = Extremely Important, 4 = Very Important, 3 = Moderately Important, 2 = Slightly Important, and 1 = Not at All Important

	Online Survey (N=53)
Supporting local economy	4.46
Supporting local community	3.91
Providing access to food	4.30
Preserving rural character	3.55
Providing entertainment opportunities	3.53
New housing opportunities	3.04

Frequency of stores and locations mentioned by survey respondents (COUNT).

	Community Day (N=60)	Online Survey (N=53)	Aggregate (N=113)
Food Lion	25	27	52
Wal-Mart	22	13	35
ALDI	3	5	8
West Point	11	23	34
Gloucester	9	11	20
King William	9	0	9
Tappahannock	7	3	10

Frequency of stores and locations mentioned by survey respondents (PERCENTAGE).

	Community Day (N=60)	Online Survey (N=53)	Aggregate (N=113)
Food Lion	42%	51%	46%
Wal-Mart	37%	25%	31%
ALDI	5%	9%	7%
West Point	18%	43%	30%
Gloucester	15%	21%	18%
King William	15%	0%	8%
Tappahannock	12%	6%	9%

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