



# Thomas Jefferson Planning District Commission

## Comprehensive Economic Development Strategy – Kickoff

Presentation to the TJPDC CEDS Committee

April 2023

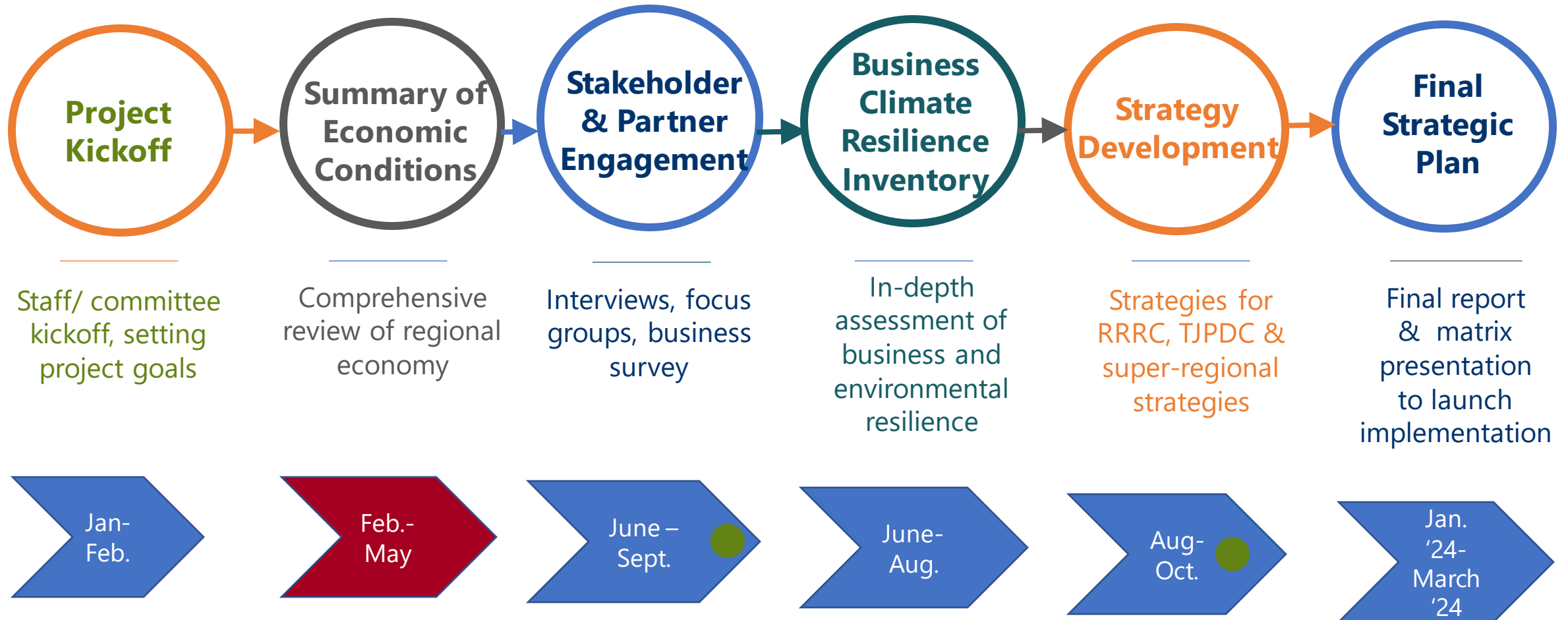


# Agenda

- Where are we in the process
- How we're using data
- Five takeaways from the data
- Q&A Session
- Engagement
- Wrap Up & Next Steps

# Where We Are

## 15-month Timeframe



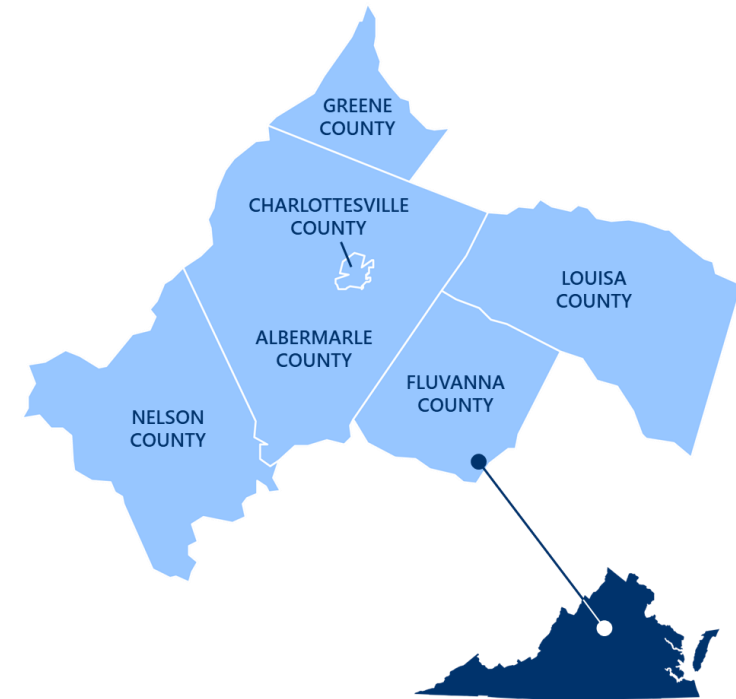
● Indicates proposed site visit

# How We're Using Data

**Determining who lives in TJPDC** – age, household size, income, other characteristics

**Evaluating the economy in the region** – Jobs, industries, wages, commuting patterns

**Understanding current market trends** – real estate types, vacancy rates, market rents, available sites

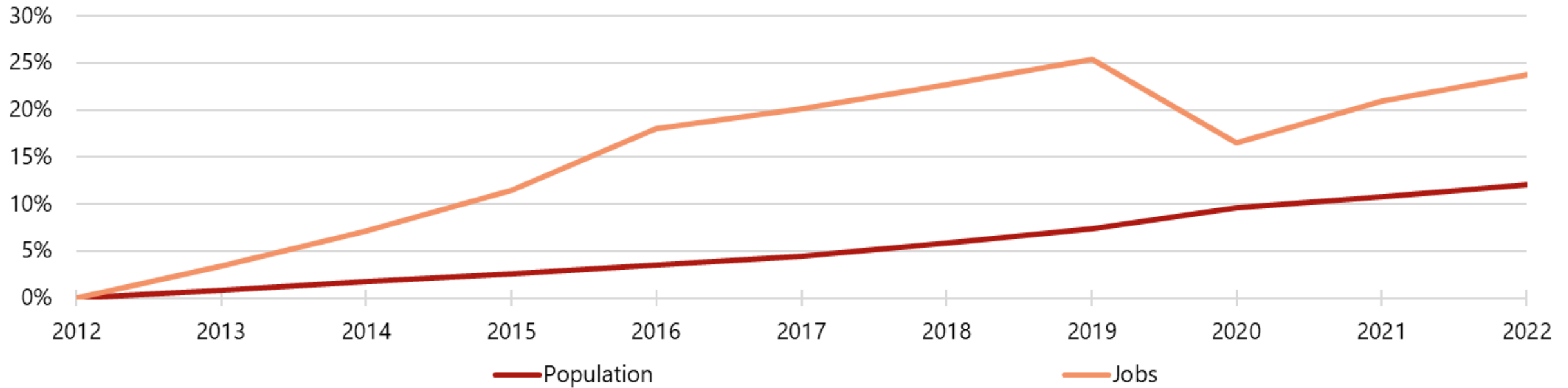


# Five Key Takeaways From Data

1. From 2010 to 2020, the TJPDC region's population growth (12.3%) outpaced both Virginia (8.7%) and the US (7.3%).
2. The public sector plays a large role in the economic activity of the region. This spans UVA and healthcare institutions, and also has implications in other industries.
3. While the public sector leads in GRP contributions, the top three GRP growth sectors from 2017-2021 were Wholesale Trade, Management of Companies, and Finance & Insurance.
4. The top occupations that workers are traveling into the region for are Postsecondary teachers, Registered Nurses, and Office Clerks, General.
5. Strong demand for warehouse and distribution space has drawn vacancies in the industrial sector down nearly 1%.

# TJPDC's strong population growth

**Thomas Jefferson Planning District Percent Change in Population vs Jobs, 2012-2022**

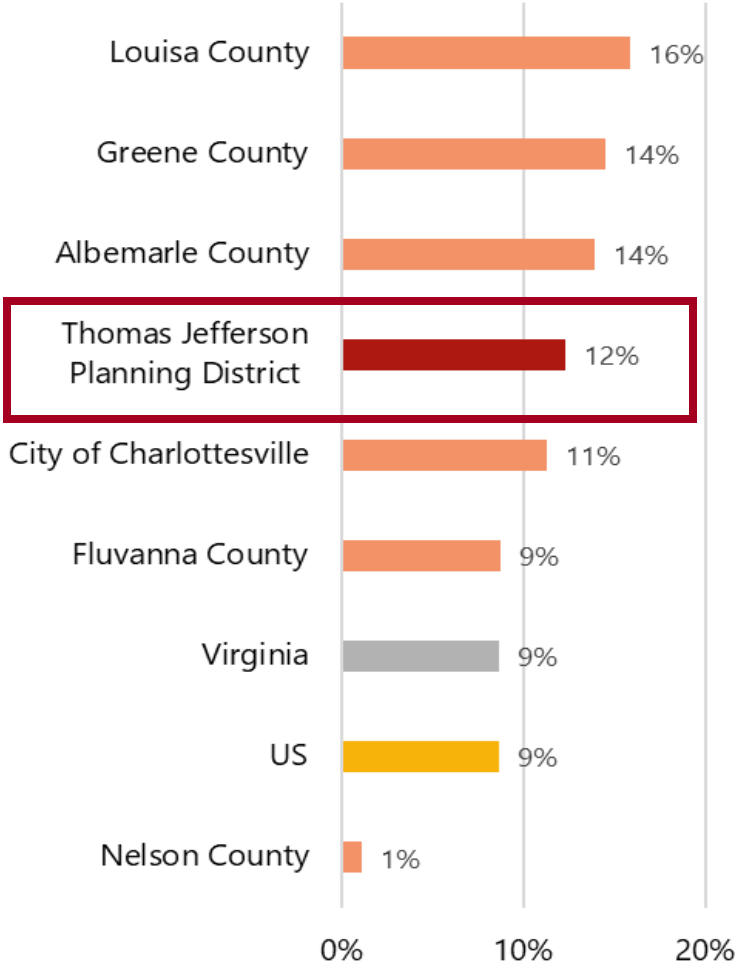


**Source:** Population: Weldon Cooper; Jobs: Lightcast



# Regional Population Change

**Percent Change in Households,  
2010-2020**

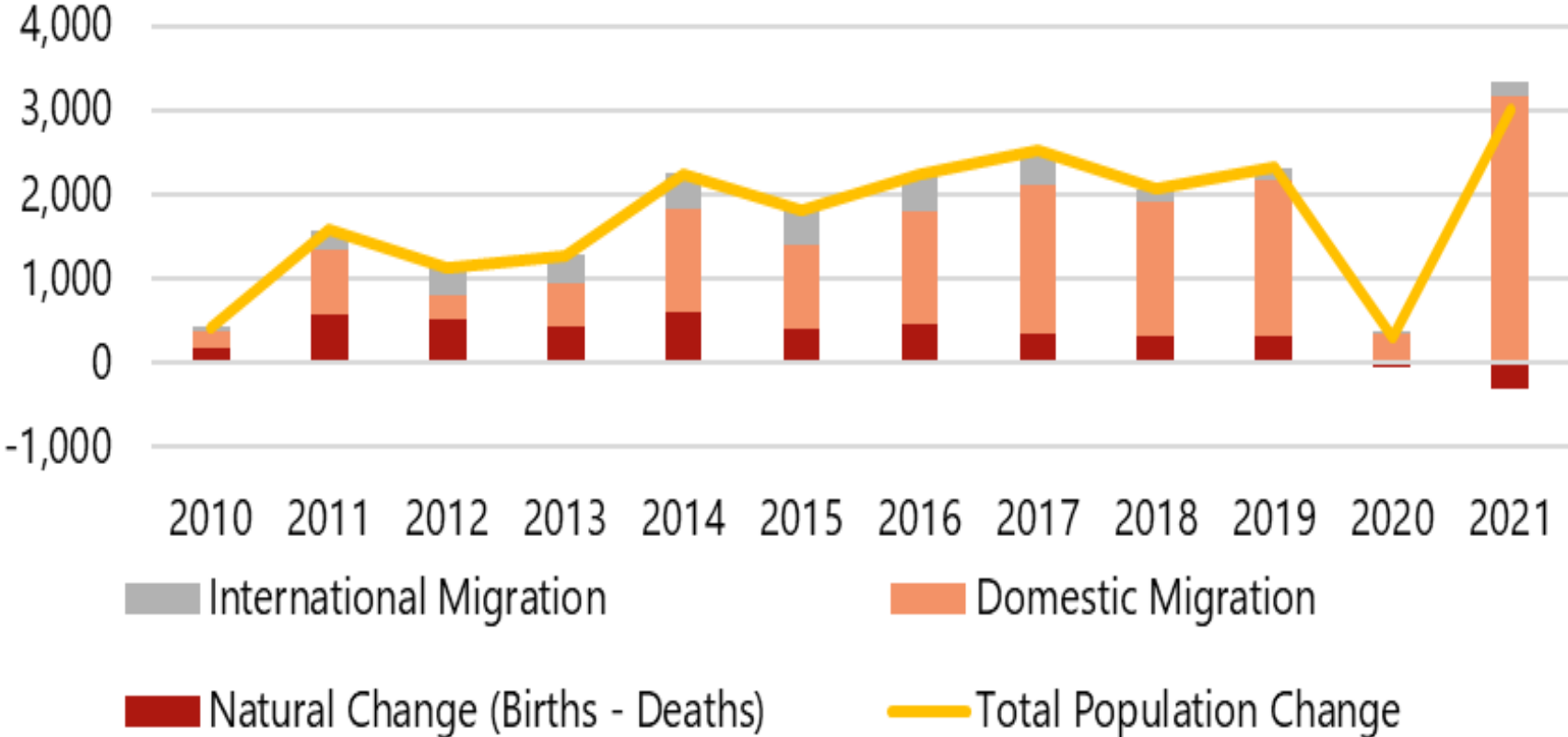


Source: Decennial Census, Esri

- TJPDC growth in households outpaced both VA and US.
- Nelson County is the sole county not keeping pace with or outpacing the state and national average

# Regional Population Change

## Thomas Jefferson Planning District- Components of Population Change, 2010-2021

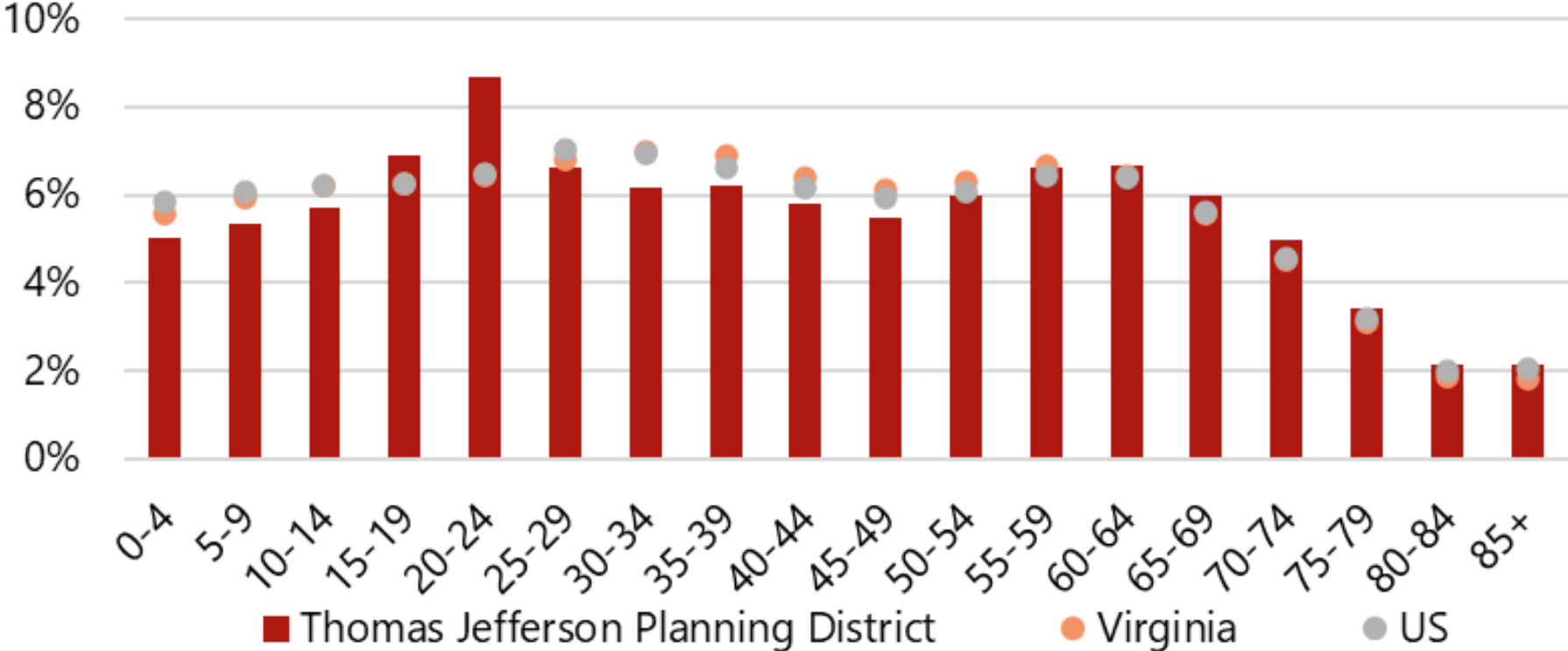


Source: Census 2021 Population Estimates



# Region's Age Cohorts

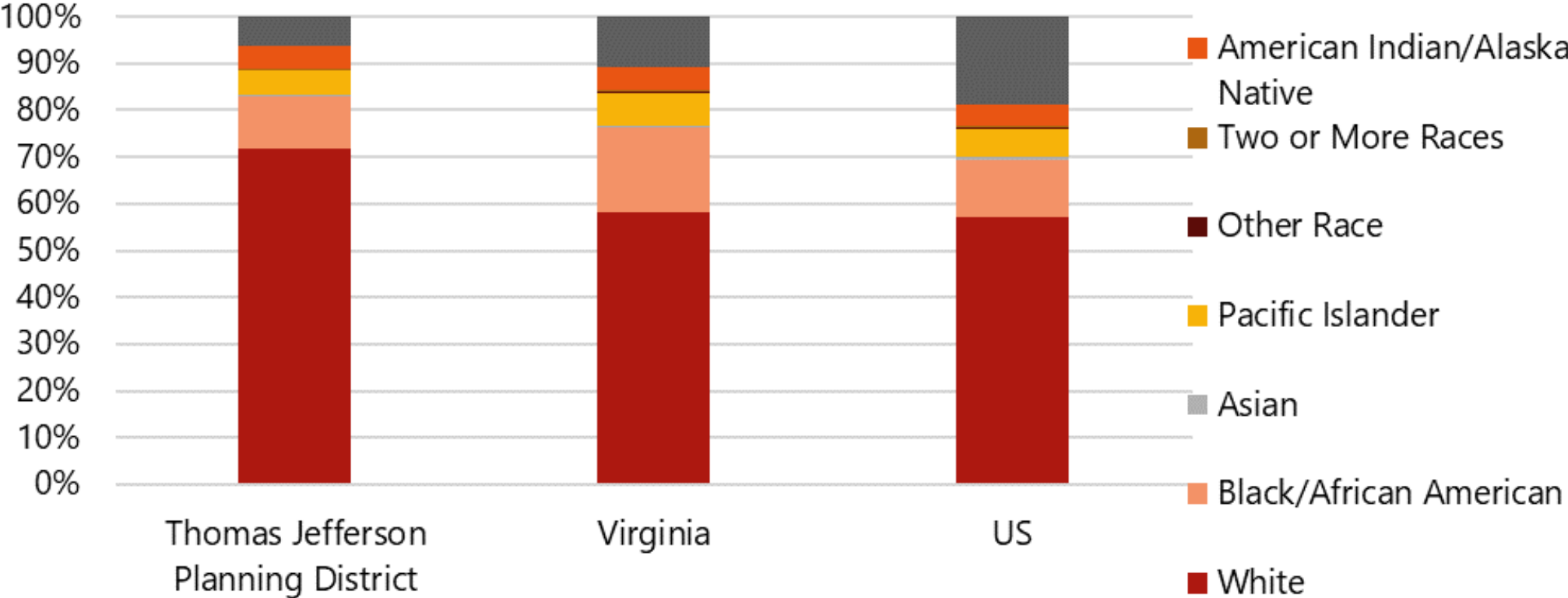
**Age Distribution, 2022**



Source: Esri

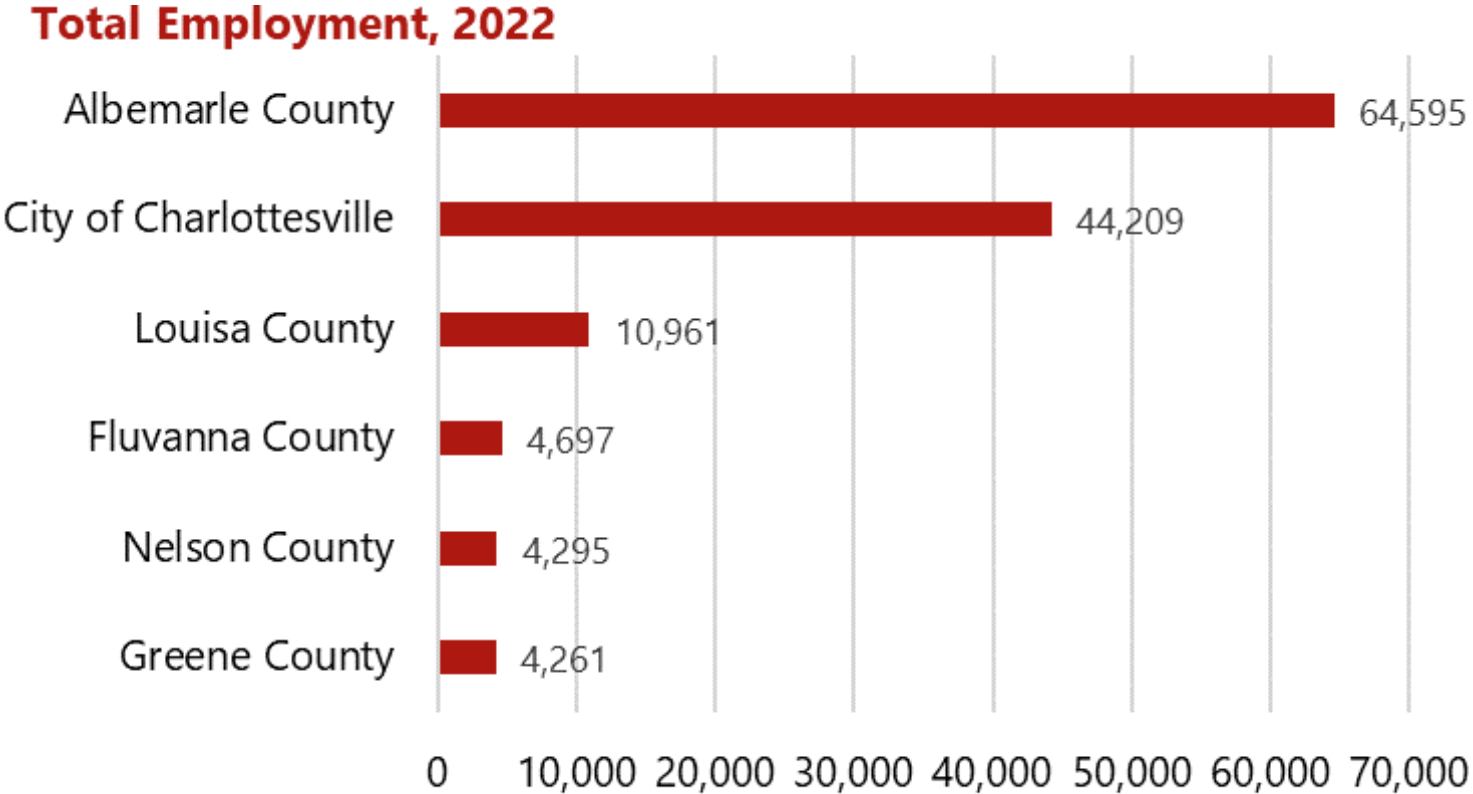
# Region's Racial Composition

**Population by Race/Ethnicity, 2022**



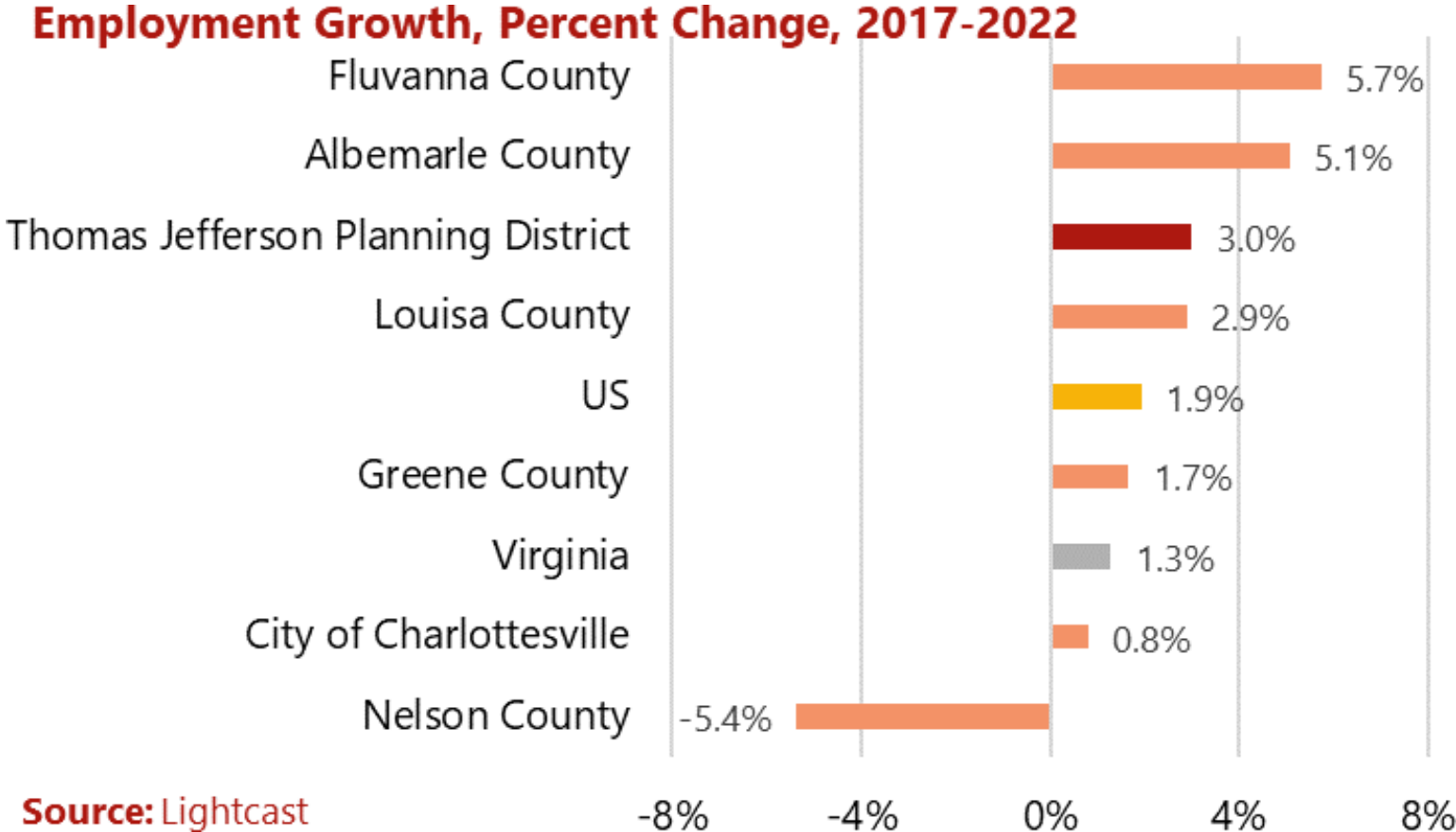
Source: Esri

# Regional Employment Breakdown



Source: Lightcast

# Employment Change in Region

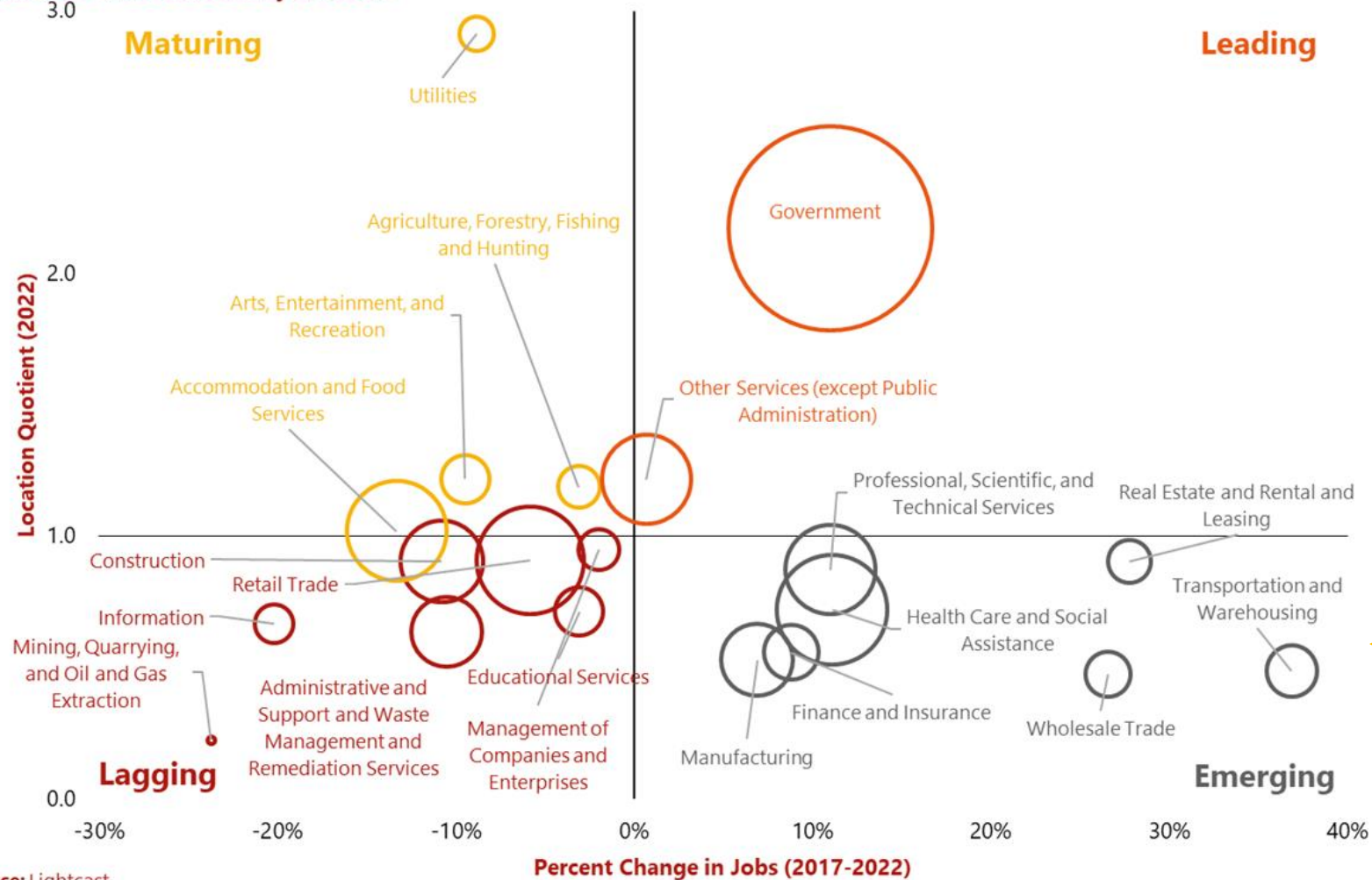


Source: Lightcast

# The public sector is a strong component of the economy, while many other industries show emerging strengths

## Key Metrics by Sector, Thomas Jefferson Planning District

Bubble size indicates 2022 job count



Rapidly growing industries

Source: Lightcast

# Industry Sectors

## Leading Industries

Growing, concentrated

### **Government**

Jobs: 41,833

Job Change (2017-2022): 11%

Share of Region's Jobs: 31.5%

Location Quotient: 2.2

#### **Top Subsectors:**

Education (State Government), including UVA (20,385 jobs) and Education (Local Government) (6,263 Jobs)

### **Other Services (Except Public Administration)**

Jobs: 8,211

Job Change (2017-2022): 0.7%

Share of Region's Jobs: 6.2%

Location Quotient: 1.2

#### **Top Subsectors:**

Private Households (2,710 jobs), and Religious Organizations (1,415 jobs)

## Emerging Industries

Growing, not as concentrated

### **Professional, Scientific, and Technical Services**

Jobs: 8,262

Job Change (2017-2022): 11%

Share of Region's Jobs: 6.2%

Location Quotient: 0.9

#### **Top Subsectors:**

Computer System Design and Related Services (1,846 jobs) and Scientific Research and Development Services (1,525 jobs)

### **Health Care and Social Assistance**

Jobs: 12,470

Job Change (2017-2022):

11.1%

Share of Region's Jobs: 9.3%

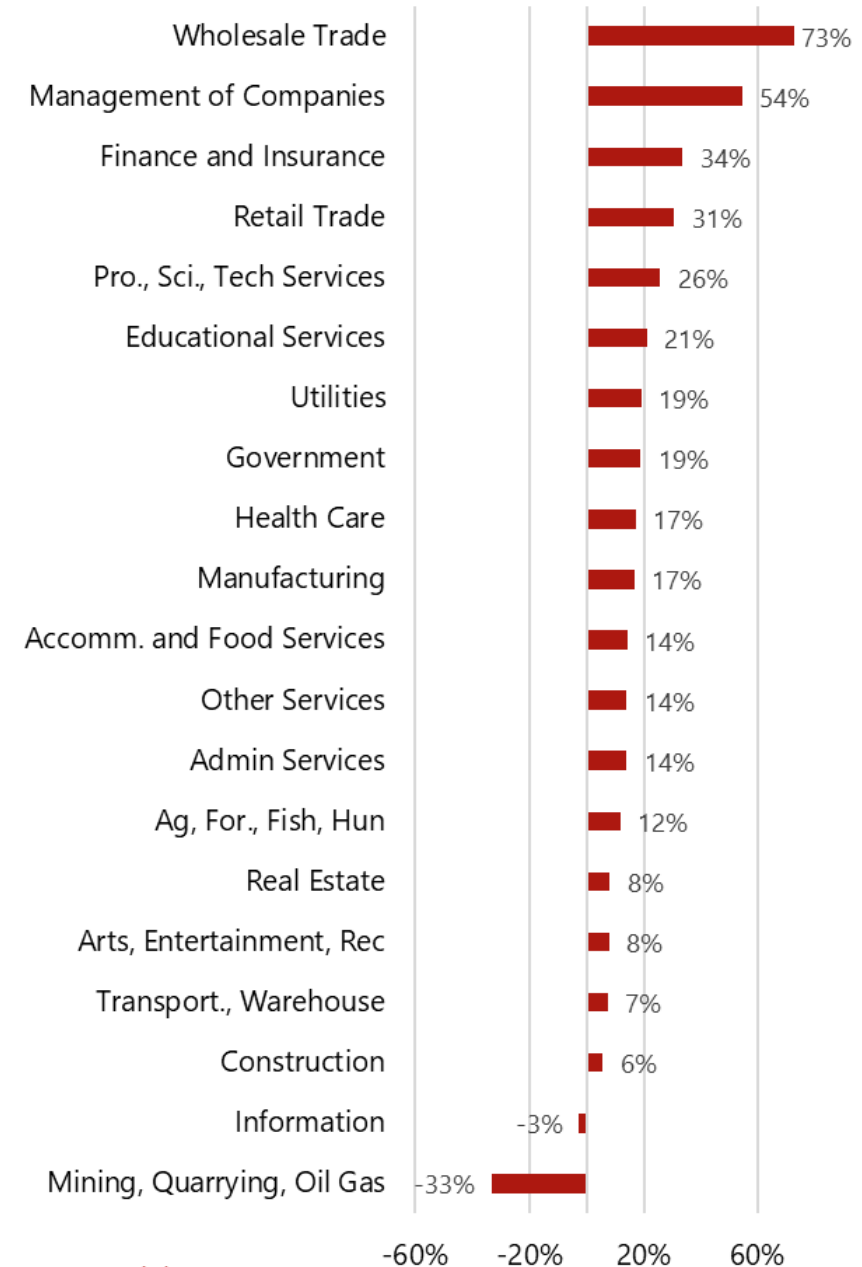
Location Quotient: 0.7

#### **Top Subsectors:**

Office of Physicians (2,945 jobs) and Individual and Family Services (2,095 jobs)

Wholesale Trade,  
Management of  
Companies, and  
Finance & Insurance  
leading GRP

GRP Growth by Sector, 2017-2021

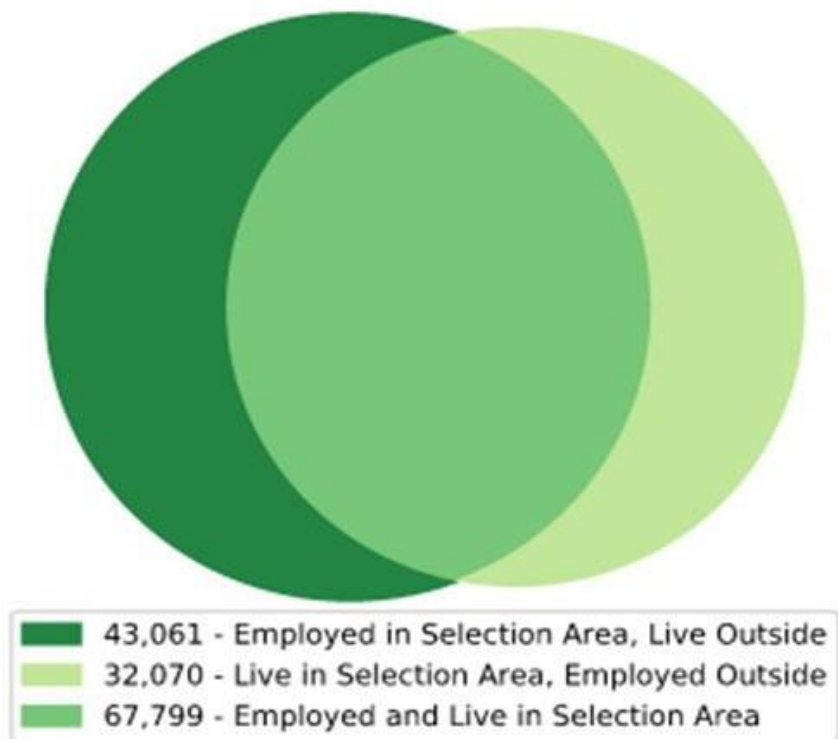


Source: Lightcast

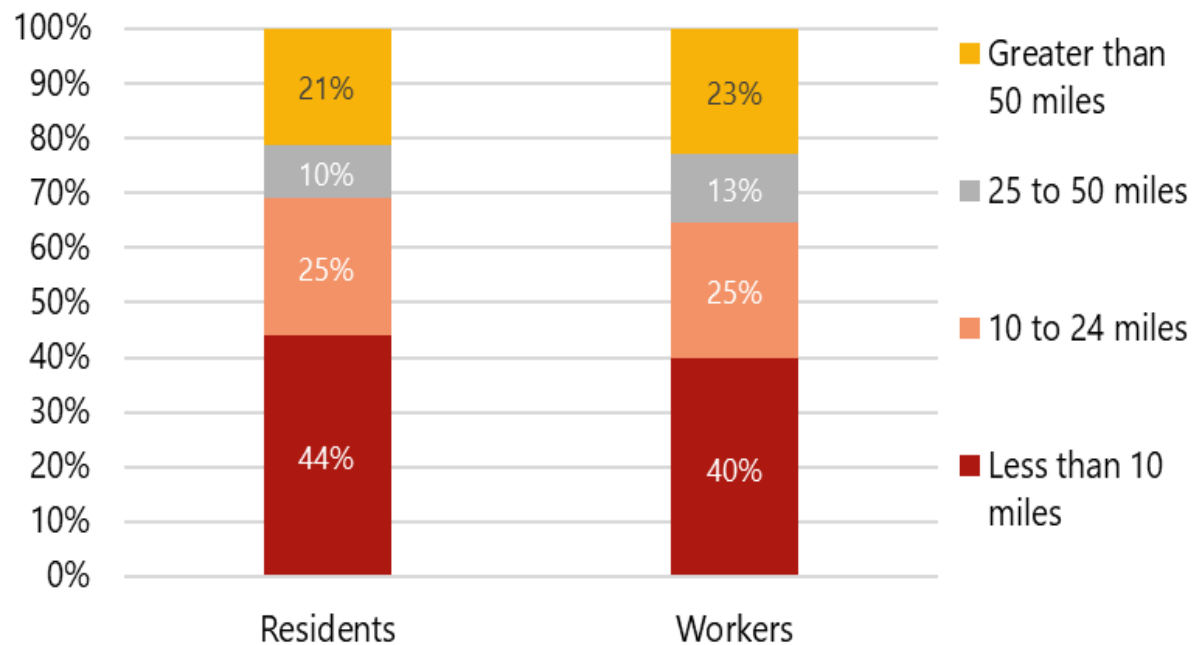


# Commuting Patterns

Inflow/Outflow Job Counts in 2019

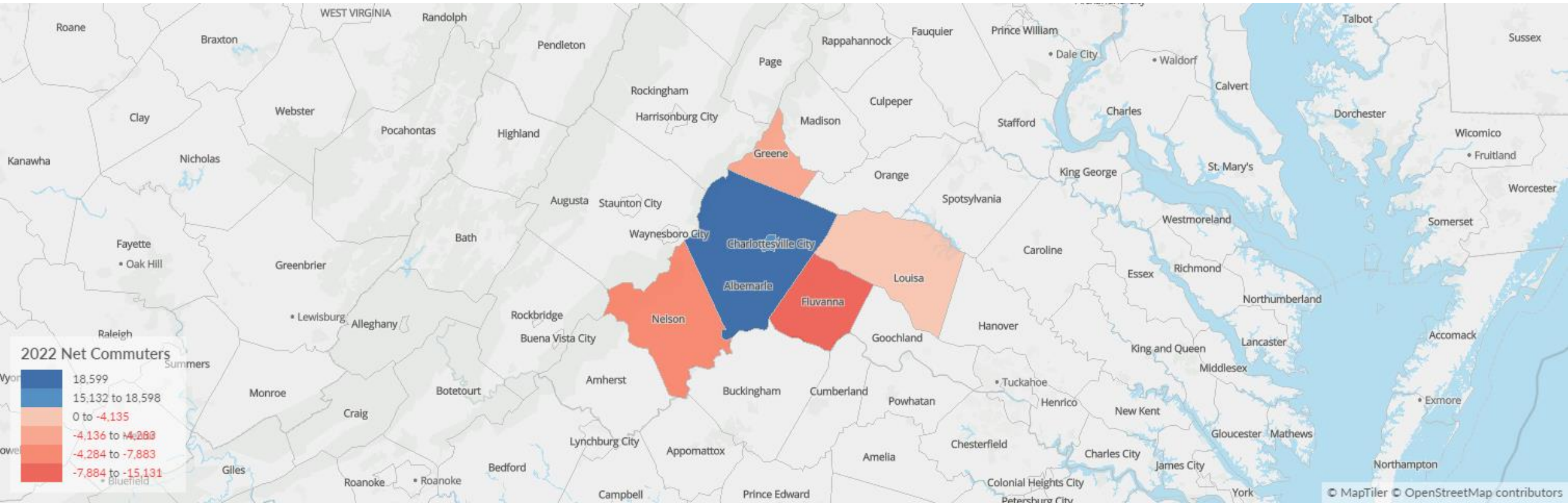


Commuting Distance for Thomas Jefferson Planning District Residents and Workers, 2019



Source: Census OnTheMap

# Net Inflow of Postsecondary teachers, Registered Nurses, and Office Clerks, General



# Net Inflow of Postsecondary teachers, Registered Nurses, and Office Clerks, General

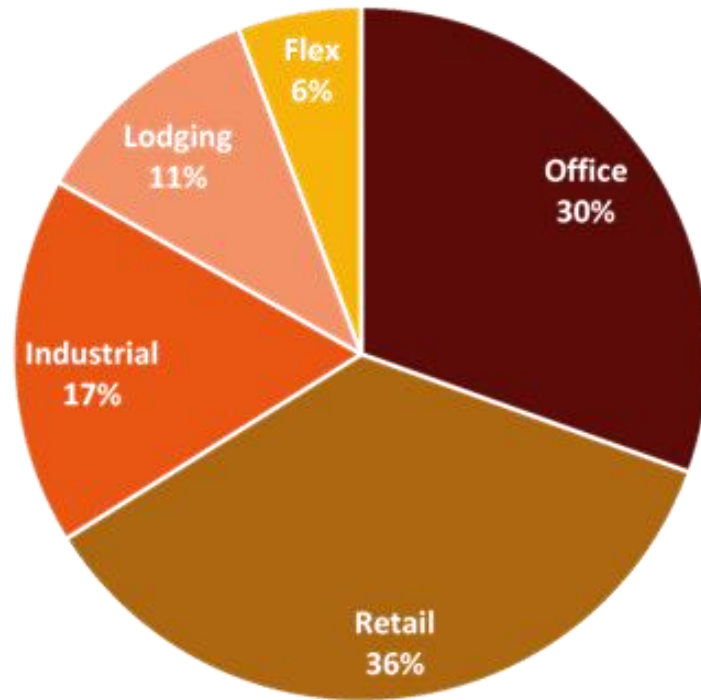
**Top 20 Occupations by Net Commuters, Thomas Jefferson Planning District, 2022**

SOC	Description	2022			Resident Workers Per Job
		2022 Jobs	2022 Resident Workers	2022 Net Commuters	
25-1099	Postsecondary Teachers	5,110	3,877	1,232	0.76
29-1141	Registered Nurses	3,986	3,051	935	0.77
43-9061	Office Clerks, General	3,218	2,709	510	0.84
31-1128	Home Health and Personal Care Aides	2,592	2,218	374	0.86
31-1131	Nursing Assistants	1,715	1,366	349	0.80
53-7065	Stockers and Order Fillers	2,089	1,819	271	0.87
29-1229	Physicians, All Other	798	537	262	0.67
37-2012	Maids and Housekeeping Cleaners	1,788	1,530	258	0.86
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	1,402	1,145	257	0.82
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,809	1,560	248	0.86
29-2018	Clinical Laboratory Technologists and Technicians	771	544	227	0.71
43-4171	Receptionists and Information Clerks	1,297	1,077	220	0.83
53-3033	Light Truck Drivers	757	544	214	0.72
33-2011	Firefighters	724	527	197	0.73
15-1252	Software Developers	1,497	1,305	192	0.87
19-1042	Medical Scientists, Except Epidemiologists	546	363	183	0.66
19-3099	Social Scientists and Related Workers, All Other	496	336	160	0.68
43-1011	First-Line Supervisors of Office and Administrative Support Workers	1,310	1,161	148	0.89
43-3031	Bookkeeping, Accounting, and Auditing Clerks	1,394	1,249	145	0.90
53-3053	Shuttle Drivers and Chauffeurs	340	202	137	0.60

Source: Lightcast

# Office and retail space account for majority of real estate in regions

TJPDC Non-Residential Real Estate Inventory  
by Type 31.8 msf in 2022



Source: CoStar

## Regional Vacancy Rates low compared to US

- **Office:** 7.7% vs. 16% US
- **Retail:** 4.9% vs. 4% US
- **Industrial:** 1.2% vs 4% US
- **Lodging:** 63.9% vs 67% US (Occupancy Rates)
- **Flex:** 0.3% vs 5% US

# Q & A Session

- What was the most surprising piece of information from today's data?
- How does the region work together to capitalize on its economic drivers as well as diversify the overall economy?
- Releasing of report





# Padlet

Padlet

Darrell Booker + 3 • 1mo

## Thomas Jefferson Planning District padlet

Instructions: Question 1 Question 2. Question 3. Section 5 Section 6 Add section

This is an open forum where the CEDS committee will be able to interact with one another and use this platform as a resource throughout the span of the project.

Questions will be posted periodically prior to committee meetings to help gather information and input on the CEDS process.

Add comment

**Yes. Albemarle County is currently updating the Comprehensive Plan (called AC44)**

Add comment

**Are there planning process that are ongoing, anticipated in the near-term or that recently wrapped up? (Please include any plans or project within the region/not just economic development related)**

This could span anything from an economic development strategic plan, site development, workforce study, strategic visioning...anything that demonstrates goals for your locality and the region. Let us know with a comment below what the process is, who led it, and then email Christine or Ruth with the actual document if it is available.

Anonymous 1mo  
The Defense Affairs Committee of the Chamber of Commerce commissioned an Economic Impact Study from the Weldon Cooper Center to better understand the impact of the defense industry/sector in the Cville/Albemarle/Greene region. This study will be made public in early

**Who should we be reaching out to as part of our engagement efforts?**

Which organizations, businesses, civic leaders, and others at the forefront of industries and communities that can help us understand the region better. Please list traditional and nontraditional economic development partners.

Anonymous 1mo  
Tom Thorpe - Afton Scientific

Anonymous 1mo  
Rebecca Ivins - Chair of Chamber of Commerce Board

Anonymous 1mo  
Lettie Bien, Defense Affairs Committee Program Manager (Chamber)

Anonymous 1mo  
Steve Ryan, Northrop Grumman

Add comment

**As we look ahead to engaging with businesses and community organizations, we are curious what has worked best for you in your community. What is your preferred way to engage with stakeholders, business, and nonprofits?**

Do you find that stakeholders in your region prefer digital engagement, in-person, or a hybrid?

We are also planning on conducting a stakeholder survey as part of our scope of work. Would you be willing to share a survey with your networks to maximize input?

Anonymous 1mo  
In person facilitated group discussion and ideation.

Anonymous 1mo  
Survey, also starting to use

**Did any of the five takeaways bring up any questions that you may have?**

Add comment

**With most of the the region's population living in Albemarle and Charlottesville, how does that impact how the region works together/How does that impact how regional plans are developed and implemented?**

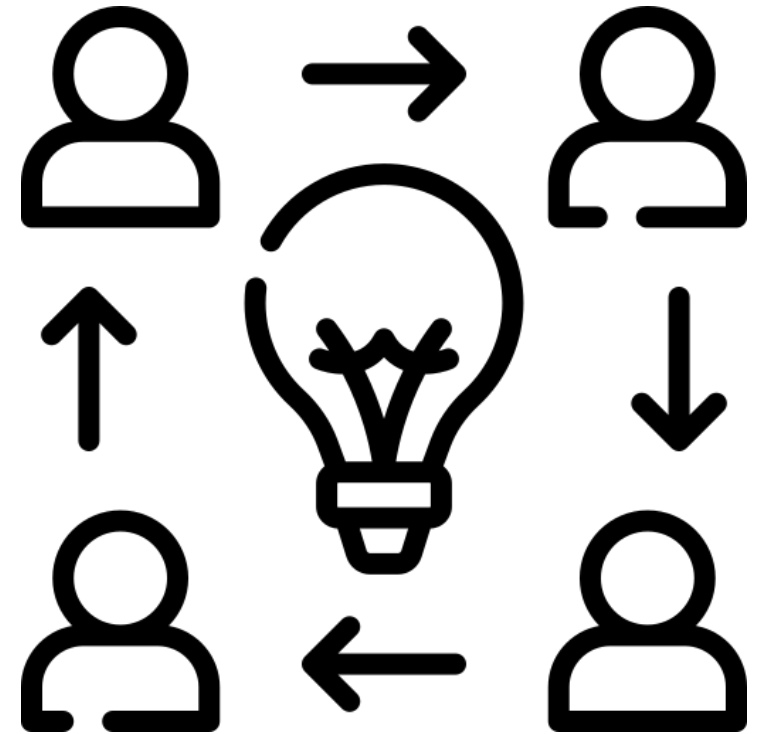
Add comment

+



# Engagement

- Initial Padlet Feedback:
  - A strategic combination of in-person, virtual/phone calls, and surveys to maximize input.
  - Reaching out to the defense sector (Northrop Grumman, Defense Affairs Committee)
- Interviews & Focus Groups
- Survey





# Next Steps

- CEDS Committee will receive data report by end of next week.
  - Additional comments to Padlet by 5/12
- CEDS Committee continue sending existing reports
- Engagement planning
  - Emerging themes and trends

