

Annex A: GEOGRAPHIC AREA VISIONING

Geographic vision is essential in formulating and implementing targeted programs to attract businesses that are consistent with the local conditions and community values in Currituck. It builds on the vision for the future of their area, defined by where the county wants to go and what success will look like. Geographic visioning provides the county an opportunity to balance development and shared economic growth.

Based on this vision, the county can draw up and implement plans to achieve this vision—including targeting businesses or industrial clusters¹, aligning the regulations to fit with this vision, and promoting the county in such a way as to draw the vision appropriate opportunities to Currituck.

There are eight geographic areas in Currituck that are distinct and for which different targeting strategies would be appropriate. The visioning helps the county to position the sub-area for success with certain types of industry clusters—considering key factors that enable those industries to thrive and ways that the county can support common needs that support the industry.

1. Moyock
2. Maple/Barco/Courthouse/Airport/ Aydlett / Waterlilly / Churches Island / Bell’s Island
3. Shawboro
4. Poplar Branch/Grandy/Jarvisburg
5. Lower Currituck/Powells Point/Point Harbor
6. Knotts Island/Gibbs Woods
7. Outer Banks
 - Corolla
 - Off Road
8. Bridge Terminus Mainland & COBX

¹ Industrial clusters enable the key businesses in the industry sector—along with the citizen’s of the geographic area—to define a common vision and work towards growth and success. They allow the clusters to not only seek ways to benefit from county support, but also to examine the changes and improvements that need to occur within the cluster to

I. Moyock

The 2006 Land Use Plan notes that Moyock is a bedroom community for the Tidewater Area. It focuses on residential development and supporting retail services. Moyock also enjoys already established industrial parks close to the railroad and 158.

Economic Targets

- Protection of the 168 Corridor aesthetic and community feel with limited curb cuts and roadside industrial property. This includes the historic aspects and quaint mom and pops shops.
- Health Care. Given the proximity to Hampton Roads, health care services might be able to draw on residents in these areas—providing a base on which to grow. This would include ancillary medical services, billing, support, etc. Explore the possibilities of spring boarding off of nearby hospitals at either end of the county (Grandy, Moyock).
- Mixed use, possibly destination retail developments and hotel. Moyock could be encouraged to develop as a destination, considering its proximity to Chesapeake. A multi-use facility could be constructed for conventions, trade shows, entertainment and more. The complex could include motels, restaurants and retail. While not upper end jobs, this still is considered a positive because of the influx of money without the burden to our schools, county services and more. The visitors come, spend their money, and leave to return again.
- Provide industrial development opportunities for cluster industries in the Hampton Roads area. Perhaps by providing transportation, warehousing, distribution and FTZ-designated properties and rail-served properties. This could include defense, logistics and military supporting technology industries. In the area of defense, stringent evaluation will be undertaken for the impacts on the community and environment from defense related activity that might take place in Currituck. (e.g. expansion of Blackwater, OLF, etc.). The better approach might be to target support businesses to the defense industry cluster, as opposed to having actual operations in Currituck County.

Suggested Implementation Phasing

To ensure a strong economic impact and resulting growth, a phased strategy in Moyock should be employed. Phase one should focus on business and industry, supporting high paying jobs. Again the proximity to Hampton Roads would enable the businesses to draw skill sets that are out of the area initially, while Currituck works with the companies to develop an in-county workforce with skills that will be required. Specific industries to target include technology, aerospace, health services, and engineering.

Phase two would focus around retail and destination related industries to begin to maximize the seasonal traffic through the county.

- Retail would include restaurants, shops and boutiques that could also service local residents and promote business activity for current businesses. This could be an opportunity for mixed use development, including rental housing and higher density development. A critical part of development should include a comprehensive plan for sewage infrastructure that can be readily expanded for future needs. If the county shows a commitment to provide more than an ad hoc sewage plan, it will significantly improve recruiting tools.
- Destination related industries could be anchored with a hotel/conference facility that might be used as a precursor to training/re-training/education facilities. A commitment to adequate recreational facilities in Moyock and historic sites would enhance the destination experience and provide activities for local residents. If successful with new development, there will be a need for servicing temporary construction workers/companies for county/state projects as well as families relocating to the area. Any opportunities that the county/state can build facilities and/or roads to draw traffic off the main corridor will improve overall economic activity.

Regulatory Issues

- Need for properly zoned property to accommodate industrial recruitment. Ensure that heavy industry and similar activities take place in areas off of Caratoke Highway with buffers between visual impact areas and residential areas

- Comprehensive Wastewater Treatment facilities and appropriate service districts, with reasonable tap fees and rates for the community.
- Enhanced enforcement for corridor beautification and protection of visual impact areas.
- Further exploration of the impact of health care reform on doctor owned facilities.

II. Maple/Barco/Courthouse/Airport

This area is comprised of distinct sub-areas which are subdivided below.

A. Courthouse/Barco/Coinjock/Airport Area

The policy emphasis of the 2006 Land Use Plan is for the Barco/Coinjock/Airport area to be a principal community center serving the central area of the mainland. If the proposed Mid-County Bridge is completed, the area can become a major new mainland service area for the Corolla areas of Currituck County.

This area includes an elementary school, a middle school and a high school, the airport, the landfill/transfer station, the Sheriff's office and jail, a County Park, a fire/EMS station, and a water treatment plant. A number of small businesses are also located within the area. Compared to many areas of the mainland, this area has a significant amount of land that is not in wetlands.

There is a high probability of growth in the area and the policy emphasis of the Land Use Plan is to encourage quality development and the preservation of open space in conjunction with development approvals. Furthermore, in 2009 the Planning Department completed a Maple-Barco small area plan (SAP) which highlighted the numerous specific target areas for industrial, mixed-use, community and agricultural development. This SAP will provide the detailed guide to the specific Airport area and Barco area concerns of this section and will provide reference and justification for future incentive and land-use decisions.

Economic Targets & Potential:

- Mixed-use residential retail and office development in density
- Hospitality services for travelers

- TWD (transportation, warehousing and distribution)
- Value-added manufacturing
- Aviation-related businesses (Currituck Regional Airport)

Regulatory Issues

- Developing a regulatory, review or other framework process to assess existing infrastructure, provide for an agreement with existing industrial property owners, and consider an incentive or shared program to provide cost-sharing on the outlay of additional infrastructure.
- Need for identification of potential upfit items for industrial buildings, owners and tenants to make existing buildings work.
- County competition with private industry related to industrial parks and client locations – transparency discussion.

B. Aydlett / Waterlily / Churches Island / Bell's Island

The policy emphasis of the land use plan is for developable areas of Aydlett, Waterlily and Churches Island to remain as low-density residential areas at 1 unit per acre. The area is a mix of Limited Service and Rural classifications on the Future Land Use Map. Historically, this area was a center of resource-based industry, with cedar-shake factories, barrel factories and various other operations. Generational, familial and cultural forces remain strong in this area.

Economic Targets & Potential:

- Water-based industry and utilizing and enhancing water-access points
- 4 public boat ramps, 2 public campgrounds, and many lodges, hunt clubs and private docks/launches.
- Available properties adjacent to the ICW
- Redevelopment opportunities along ICW
- Eco-tourism and related business opportunities (hunting/fishing lodges/kayaking/camping)
- Preservation of these resources provides a competitive advantage for a shrinking resource

- Small business/entrepreneur opportunities and expansion of existing operations

Regulatory Issues

- Infrastructure (water, wastewater, internet, roadways)
- Environmental challenges and concerns for water-quality
- Access to HWY 158, especially in light of the MCB, for many L turning vehicles
- Is there a likelihood or risk of the ICW/158 bridge being struck, and what is the risk/probability
- Development potential for marina, recreation, marine industry and further residential or hospitality on available parcels.
- Development North of ICW vs. South, potential for more access points and better traffic flow

III. Shawboro

The policy emphasis of this plan is to encourage the preservation of agriculture and open space in the Shawboro/Crawford area whenever possible. While this area will be impacted by the proposed NC 168 Bypass, the overarching development policies of the area should hold. The purpose of the proposed bypass is to move traffic through the County rather than create an additional development center and therefore access should be limited.

Small businesses serving the needs of a rural area (general store, farm supply, hardware, etc.) should be encouraged to locate at road intersections. Residential development density equal to or less than one unit per three acres is to be encouraged in the Shawboro/Crawford area and it has therefore been identified as a mix Conservation and Rural Areas on the Future Land Use Map.

Economic Targets & Potential:

There are three key economic drivers that can balance the vision of the county, the safety for the public and quality of life for the residents in the area, and the environmental impacts.

- Agricultural products, conservation and protection of farming and agricultural resources

- Biotechnology-crop/plant made, laboratories, greenhouses and other commercial agriculture ventures
- Farm implement machinery sales, manufacturing or other value-added, agricultural production (though linkages might be made to nearby geographic areas for clustering around agricultural production)

Regulatory Issues

- The predominantly rural Shawboro/Crawford area contains some of the best, most extensive agricultural lands in the county. On one hand, there are the landowners who have profitable farm operations and a strong desire to continue farming for as long as they, and perhaps their children and grandchildren, are able to do so. These landowners are concerned about residential subdivisions moving into the area, whose residents soon begin complaining about the dust, odors, tractors on the road and other factors customarily associated with farming. On the other hand, there are the landowners who may be struggling to keep their farm operations afloat, or who may be reaching retirement age with no offspring interested in taking over the farm.
- The County should study the area more closely as it proceeds with an update to the Thoroughfare Plan. Residential development, when approved, should bear some direct relationship to agricultural activity so as to minimize land use conflicts between farm operations and nearby residents. When residential development does occur, it should be strategically located to minimize conflicts. Common sense examples include placing residential development: (1) upwind of prevailing winds and open fields (2) behind or in and among wooded areas (3) clustered near existing nonfarm uses such as a church, general store or other residences. “Leapfrog” residential subdivisions, unrelated to farm activities, and that would interrupt a large expanse of agriculture and open space, should be strongly discouraged.

IV. Poplar Branch/Grandy/Jarvisburg

The 2006 Land Use Plan notes that Grandy is second only to Moyock in terms of near term development pressures. It is still an attractive alternative for affordable housing compared to the Outer Banks, and its Class I soil is relatively well-suitable for development. With continued development in the area, demand for additional commercial services will follow.

Economic Drivers:

- There are two golf courses located in the Poplar Branch/Grandy area: The Carolina Club; and Goose Creek. The Carolina Club is a sister club to The Pointe Club, located in Powells Point, NC. Both courses are tourist destinations but also serve the local and regional population, golfers coming regularly from the Outer Banks and the Elizabeth City areas to play these courses. The Carolina Club, along with Waterside Village cater to upscale housing for a mostly 50+ community.
- Mid-County commercial services including a grocery store, large Post Office, beautician services, wireless retail outlets, assorted retail stores, used car sales, a car wash, and several eateries (Eat 'N Barn, Sonic, Hardee's, a soon to be built McDonald's/McDonald's Café, Mel's Diner, Walnut Island Marina, etc.). All of these commercial services are due to the residential development in the area, and will continue to grow as development expands.
- Residential Development: There are several developments in the Poplar Branch/Grandy area, drawing both young, older and retired populations. A few examples are the golfing community, The Carolina Club (mixed younger, older and retired population); Soundside Estates and Steeple Chase (mixed but mostly younger population) and Waterside Villages (a 50+ community).
- There is a possibility for mixed use development as Poplar Branch and Grandy boast the 2 golf courses and hunting/fishing accessibility (one public boat launch in Poplar Branch) and considering its proximity to both the Hampton Roads and Outer Banks populations. There is a possibility for mixed use housing, particularly in the 50+ community, with retail options catering to the needs of that population.

Economic Potential & Targets:

- Cater to tourist populations in both the golfing and hunting/fishing areas of growth, and to attracting new residents and commercial development.
- Grandy is within proximity to serve as a distribution point for companies serving the Outer Banks, Camden County and the Elizabeth City area.
- Medical facility (with specialized medical professionals). There is a need for general medicine, but specialized services (dermatology, plastic surgery, cardiac specialties, etc.) would increase the chances of medical professionals to draw from a larger client base. The growing 50+ active community also has need of specialized services.
- Lodging facilities to accommodate the natural and commercial opportunities, as well as the specialized health-care described above, are necessary for success

Regulatory Issues

- Similar to Moyock, Grandy will likely require analysis of existing infrastructure to support growing commercial and medical base
- Failing septic systems in Walnut Island subdivision
- Potential for Mid-Currituck Bridge related traffic and activity could increase Poplar Branch Road and other secondary road traffic

V. Lower Currituck (Jarvisburg, Powells Point, Harbinger, Point Harbor)

This area is comprised of distinct sub-areas which are subdivided below.

A. Jarvisburg

The policy emphasis of this plan is to allow the Jarvisburg area to accommodate quality residential development at low densities while preserving the rural landscape between such developments.

B. Point Harbor

Point Harbor is today served by a variety of retail and other business establishments.

The policy emphasis of this plan is to allow portions of the Point Harbor area to continue to evolve as a full service community, but with better attention to the planning needed to protect residential areas and the natural features that make the area so attractive.

Economic Potential:

There are several key economic drivers that can balance the vision of the county, the safety for the public and quality of life for the residents in the area, and the environmental impacts.

- Hospitality, maintenance and service industry locations for OBX beaches
- Eco-tourism (kayaking, camping, birding, wildlife)
- Equestrian, Golf and other low-impact, for-profit recreation
- Wind energy potential (community & utility scale)
- Marine, marinas and community water-access
- Lodging facilities to accommodate the natural and commercial opportunities, as well as the specialized health-care described above, is necessary for success

- Business incubation and service provision for Northern Dare County businesses (Kitty Hawk, Duck, SS)

Regulatory Issues

- Preserve and enhance the roadside appearance of land uses along US 158,
- Place stricter controls over mining to assure that such operations do not adversely impact nearby areas,
- Cluster retail and other service businesses in carefully planned clusters, rather than encourage ordinary strip centers along the highway,
- Require vegetated buffers around non-residential uses to protect existing and planned neighborhoods
- Require vegetated buffers along shorelines to preserve public access and open space at the waters edge and to protect water quality in the sound
- and coordinate with NCDOT for the strategic placement of traffic signals along US 158 in the Southern portion of the Mainland. Housing in the Point Harbor area should continue to reflect a range of housing types and prices with emphasis on single-family site-built homes.

VI. Knotts Island / Gibbs Woods

The policy emphasis of this plan is for developable areas of Knotts Island and Gibbs Woods to remain as low to very low density residential areas.

Economic Potential:

There are three key economic drivers that can balance the vision of the county, the safety for the public and quality of life for the residents in the area, and the environmental impacts.

- Value-added agriculture and agricultural products (Wine, small field crops, fruits)
- Eco-tourism (kayaking, camping, birding, wildlife)
- Minimal future residential subdivision
- No significant commercial operations

VII. Currituck Outer Banks

The 2006 Land Use Plan defines the outer banks as one of the key sub-areas in Currituck for planning purposes. Currituck's Outer Banks is unique in that it brings together the only remaining beach on the Atlantic coastline to boast an undisturbed environment, remote beaches, sand roads, maritime forests, wild horses and abundant indigenous wildlife (the off road area) with the adjoining convenience and upscale resort setting to attract a wide spectrum of visitors (Corolla). Carefully managed, this appealing and economically lucrative character of contrasting environments can be maintained and nurtured for the optimal return for the county, its citizens, and visitors. It should be noted that the 2006 Land Use Plan clearly presented significant environmental concerns for the area as well as public safety concerns with over-development. Thus a strategy that capitalizes on the resources available without reaching beyond environmental and public safety is essential. In addition the county has adopted sustainability principles. Due to the fragile eco-systems on the outer banks, significant attention must be paid to environmental protection and sustainable development.

There are three key economic drivers that can balance the vision of the county, the safety for the public and quality of life for the residents in the area, and the environmental impacts.

1. Tourism. The area is home to the most important industry in Currituck—Tourism. To date much of the efforts of the industry, with the support of the county, has revolved around bringing more visitors to Currituck through advertising. Less has been done to strategically define how to protect the upscale tourism niche, capitalize on the synergy between the two sister areas on the Currituck Bank's, and ensure that revenue growth for the service industry in support of tourism remains on an upward path. In addition, more can be done to extend tourism into the shoulder season. Challenges include ensuring that the symbiotic relationship between Corolla and the Off Road is maintained and that the off road area does not cannibalize Corolla's niche; extending tourism into the shoulder season via partial rental weeks; developing eco-tourism promotions; and drawing the market segment with the highest multiplier effect for the service providers (stories, restaurants, etc.)

In this regard and consistent with the various Land Use Plans adopted by the county, Corolla and the Off Road must be treated individually in terms of policy and regulations. The specific value

added that these areas can bring with a well defined and consistently followed strategic framework include the following.

- Corolla. Attracting a high income market segment within the tourism trade and thus enabling more small businesses to profit; Increasing tourism dollars by maintaining the competitive position of the county within the multiple choices of destinations; Increasing property values due to the resort nature of the area and the likelihood of a high level equilibrium. Services demanded and needed, will increase, but properly only proportionately to the income stream (and maybe not at the same rate)
- Off road: Increasing property values in the off road by maintaining the uniqueness of the area and capitalizing on the proximity to federal parks, protected areas, and open space; Increasing tourism dollars by maintaining the competitive position of the county within the multiple choices of destinations—and ensuring that second home vacation rentals provide an up-scale remote experience; Minimal Services Required (e.g. volunteer fire, EMS, police) and maintain the no-commercial policies for the area; Define innovative services that can help balance the tourism growth with its impacts (e.g. home delivery, in home catering, etc.); Self Sustaining Model for Revenue Generation and Wild Horse Protection Possible (eg. Jeep tour revenues, any other types of tourist related service revenues associated with eco-tourism; limitation on the volume to maximize the revenue stream and protect the environment).

2. Year Round Residents. Second, the resort and upscale nature of the Banks can attract retired individuals and couples. Telecommuting and working from home are additional options that can attract diversified, year round revenue for the current retail and restaurants that support the tourism industry. Challenges include positioning the Banks in a community atmosphere and not only as rental properties; enabling service businesses in Corolla to remain open year round to serve the retirement and telecommuting residents; and balancing the two living opportunities—one with services for its citizens and one that retains it rural and remote standard of living. In the off road, a subset of the retired community can be attracted in keeping with the areas limited services. This subset will pay a premium for being away from commercial services and the atmosphere found in other areas of the off road. These present an opportunity to have unique in

home services (but clearly not commercial businesses in the off road) provided in a residential setting.

3. Eco-Tourism Springboard and Education. Third, Corolla and the off road area provide an opportunity for eco-tourism and educational programs. With the launch pad from the Corolla area, visitors and residents can explore a remote destination. By capitalizing on the open space, the thousands of acres in natural parks, and the commercial free characteristics of the off road, Currituck can strategically increase both property values and tourism dollars. Protecting the natural environment can have positive spill-over effects for the lucrative hunting and fishing industry. It can also be a spring board for expansion of eco-tourism starting points on the mainland that can provide holistic opportunities for visitors and residents. Challenges include controlling the growth in housing development; ensuring low impact, sustainable standards in the off road area; and implementing land preservation and conservation easements in the off road area to increase the open spaces while helping to ensure the availability of water and sanitation without the need for service delivery.

Economic Potential & Targets:

The economic impact can be maximized by strategically developing the strengths of the two distinct, but interconnected areas. There are many examples of how upscale, high end tourism can provide more return than over-developed tourist areas.

1. Upscale and Nature Tourism. Net Benefits Direct (direct expenditures) + Net Benefits Indirect (broader economic benefits from conservation, positive relationships between property values and proximity to un-kept / unmaintained natural parks and open space)², - The Opportunity Costs ((willingness to pay (is the county getting the optimal earnings from tourism model ³))
2. Cost of services to support upscale tourism and commercial development - Cost of services to support eco-tourism - Cost of services to support year round retired population –
3. Strategy should consider how to reduce the impact of leakage from tourism (minimal and mainly derived from tourist visiting Dare County for some recreational activities. It is not clear

² presence of extensive natural protected areas supports high real estate valuation without the need for services to those parks and open space. Protecting and creating more similar open space enables higher real estate valuation.

³ There is insufficient information from the tourist industry on the actual receipts from rentals.

that bringing those activities to Currituck would result in a net benefit to the county, as they might decrease the niche on eco-tourism and decrease the value of the up-scale experience) Other linkages include the import of products or services from distributors or businesses outside of Currituck County.

4. County Revenue Considerations. Increase Occupancy Tax; Increase Property Values; Increase Employment (move up to support for year round residents might increase the service related income of service workers—especially if upscale residents and tourists are attracted)

It should also look at the cost of not following a strategic path toward this vision. This includes the impact on net revenues if nature tourism is redirected, impact on net revenues if upper scale, family niche of Corolla is redirected, impact of damages to the environment; depreciation of infrastructure

Supporting Tourist Surveys

- July, 2009 Visitor Survey-Off Road Area. Over 200 responses.
- November, 2008 Survey of Mainland Residents (phone), Web-based tourist petition, and Off Road residents survey, Tourist Impression Survey – Web-based—“Voices of Currituck”
- February 2008 Traffic Survey and Study—Off Road Area – Off Road Task Force Report
- NC Turnpike Authority Traffic Study-Corolla

Regulatory Issues

- Tourist Carrying Capacity for the sustainability strategy. Evaluations on the environmental, financial and social impacts from increased growth of tourist should be developed. This is especially important given one of the major draws to the area are the Wild Horses—now the State Horse of Virginia. How can the county protect this resources and help ensure that tours and businesses originate in Currituck County (or those that originate outside of Currituck County have to provide revenues to Currituck for the experience)
- Regulations are not being followed in the off road consistently to ensure environmental protection. This includes construction standards and enforcement. The review above would help improve tighter construction standards, if needed.
- Consideration should be given to architectural standards and open space. In addition, a plan should be put in place to acquire land that is not buildable, in order to put this into

conservation easement and establish lower density than originally platted in 1969. A concerted effort in this regard would be successful in some areas.

- Regulations on blocking the ocean front, on the use of sand bags, beach bull dozing, sand fencing should be defined and enforced.
- Constraints or possible future planning issues with overdevelopment, overpopulation and overuse of resources, land, stormwater capability, infrastructure, etc. Maintain the no-commercial policies in the off road.
- Identifying the balance of revenue generation with overpopulation and loss of identity/special aspect of visit – ie, high density versus lower density (Dare / Corolla)
- Identifying issues related to public safety and provisions of EMS/Sheriff services. Tight restriction and enforcement should be in place for public safety (e.g. fireworks; driving practices in the summer months). This should include consideration of a system to limit the volume of traffic on the beach.

VIII. 8. Bridge Terminus Area (Mainland & COBX)

The Mid-County Bridge may or may not happen in the near future depending on many factors outside the control of the county. However, there is no question that if and when the bridge is constructed it will have a significant impact on the county and on its economic development as noted in the County's 2006 Land Use Plan. The two termini areas will be the most heavily affected by the bridge are 1) the five miles or so immediately south of the intracoastal waterway, roughly two to three miles north and south of the terminus point and 2) roughly two to three miles north and south of the CURRITUCK OUTER BANKS⁴ terminus point. [see map below]

⁴ The Currituck Outer Bank is defined as the entire area north of the county line to the Virginia line. It consists of various communities from Pine Island to Carova. The two parts of the Currituck outer Banks that will be most impacted by the bridge will be Corolla and the Off Road Area. Corolla and the Off Road area divide where the paved road ends. Corolla is south of the horse fence, and the off road area is north of the horse fence (appx. 12.75 MP)

The 2008 Economic Development Strategy “Vision Plan” for Currituck County prepared by the



UNC Center for Competitive Economics analyzed the various impacts and estimated economic return to the county. In addition to possible environmental effects negative impacts include the increase in traffic and possibly car noise during summer weekends at both termini.

The positive impact potential for economic development as noted in the UNC study includes the following:

- Growth of retail businesses in a corridor along Rt 158 serving the needs of summer renters and permanent residents in CURRITUCK OUTER BANKS – revenues that now are spent in businesses in Dare County (Duck, Kitty Hawk, ...) Growth of job opportunities for service businesses located on the mainland that can now efficiently serve a customer base in CURRITUCK OUTER BANKS.
- Expanded potential for CURRITUCK OUTER BANKS residents to have access to northern Currituck and southern Virginia shopping, health care services and entertainment venues making CURRITUCK OUTER BANKS more attractive for year round residence.

Economic Potential & Targets:

The UNC study took a quick look at the direct economic benefits possible assuming that the Currituck mainland could attract and support a mix of retail stores, restaurants, service

businesses and a hotel. They modeled this after the host of businesses that have sprung up in Dare County on the island near the Wright Memorial Bridge. They estimate 34 new businesses could be supported with annual sales of \$78 million, supporting new industry output of \$36 million annually and a creation of 468 new jobs in the county.

The study notes that if the Currituck mainland retail only matches the quality of the current Dare offerings (Home Depot, WalMart) these jobs will pay an average of \$20k per year – not raising (and possibly diluting) the average in the county.

The Currituck mainland could, however, further differentiate itself from the Dare county offerings by targeting a more upscale experience (e.g. Pottery Barn, Whole Foods, Prime Outlet). Unlike the Kitty Hawk locations in Dare County, higher end retail and service businesses could be attracted to the mainland bridge terminus area where they could serve both the seasonal and small year round demand on CURRITUCK OUTER BANKS, plus demand of full-time residents in northern Currituck County who are now working and shopping in Virginia. In addition, a more detailed study of opportunities to position the Currituck mainland to draw visitors from Hampton Roads could increase the economic opportunities (e.g. Theatre or special events).

Another option is to create linkages between the eco-tourism niche on the Currituck Outer Banks with new ecotourism operations on the mainly where lower property prices may enable viable tourism support businesses to thrive (such as ecotourism) that cannot now afford to establish themselves directly on CURRITUCK OUTER BANKS. Additional linkages could be created with the supply chain for the tourism sector on the Currituck outer banks.

The potential economic impact seems to be largely concentrated on the mainland side of the bridge. The primary benefit to the CURRITUCK OUTER BANKS area would seem to be slight reductions on costs for goods and services due to lessening of transportation costs and slight improvements in service business responsiveness given reduced travel times. If developed in an upscale manner, the presence of options on the mainland for an upper-income tourism market segment could draw a higher end client to rental homes on the Currituck Outer Banks. Ultimately the synergy could also spill over to more full-time residents on the Currituck Outer Banks in higher income categories.

Government Regulatory and Management Issues

- **The bridge toll policies**– Too high and frequent use necessary for economic growth on the mainland is discouraged. Too low and the bridge cannot be economically viable. We need to review what studies have been done so far and what toll policies are being considered to ensure that Currituck residents have access to affordable passes with low enough annual costs to encourage frequent trips. Other considerations could be in the use of occupancy tax to draw visitors from the rental units on the Outer Banks to the mainland—care would have to be taken not to cannibalize the stores already on the Outer banks.
- **Land zoning** – There is limited developable land along Rt 158 in reasonable proximity to the bridge terminus. Large blocks of contiguous land along the 158 corridor that might be available for development need to be identified and the county needs to act to catalyze a consortium of owners to work together to attract the best mix of businesses for the area. Zoning issues need to be reviewed.
- **Infrastructure** -Support infrastructure of sewer, water, power, communications and transportation connectivity need to be made available in a timely manner in the areas around the bridge terminus
- **Housing** - Locations for affordable housing for several hundred new workers needs to be assured near the terminus.
- **Strategic Planning** – Data needs to be gathered to have a strategic perspective on the mix of businesses needed and the quality of business to be courted to take best advantage of the Currituck combination of seasonal demand from high end renters on the CURRITUCK OUTER BANKS and year round demand from the high income families resident in the northern part of the county.
- **North of ICW vs South of ICW** – Importance of location for expanded retail options likely north of the Knapp bridge versus village style, service industries and businesses.

- **Impact on the outer banks.** To maintain the upscale niche of Corolla and off road, and to maintain the residential, remote nature of the off road, strong policies need to be in place to protect these economic drivers, that are consistent with the 2006 Land Use Plan.