

PERDIDO KEY MASTER PLAN DESIGN

PREPARED BY:

DPZ PARTNERS

in collaboration with

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PREPARED FOR:

ESCAMBIA COUNTY

DEVELOPMENT SERVICES DEPARTMENT

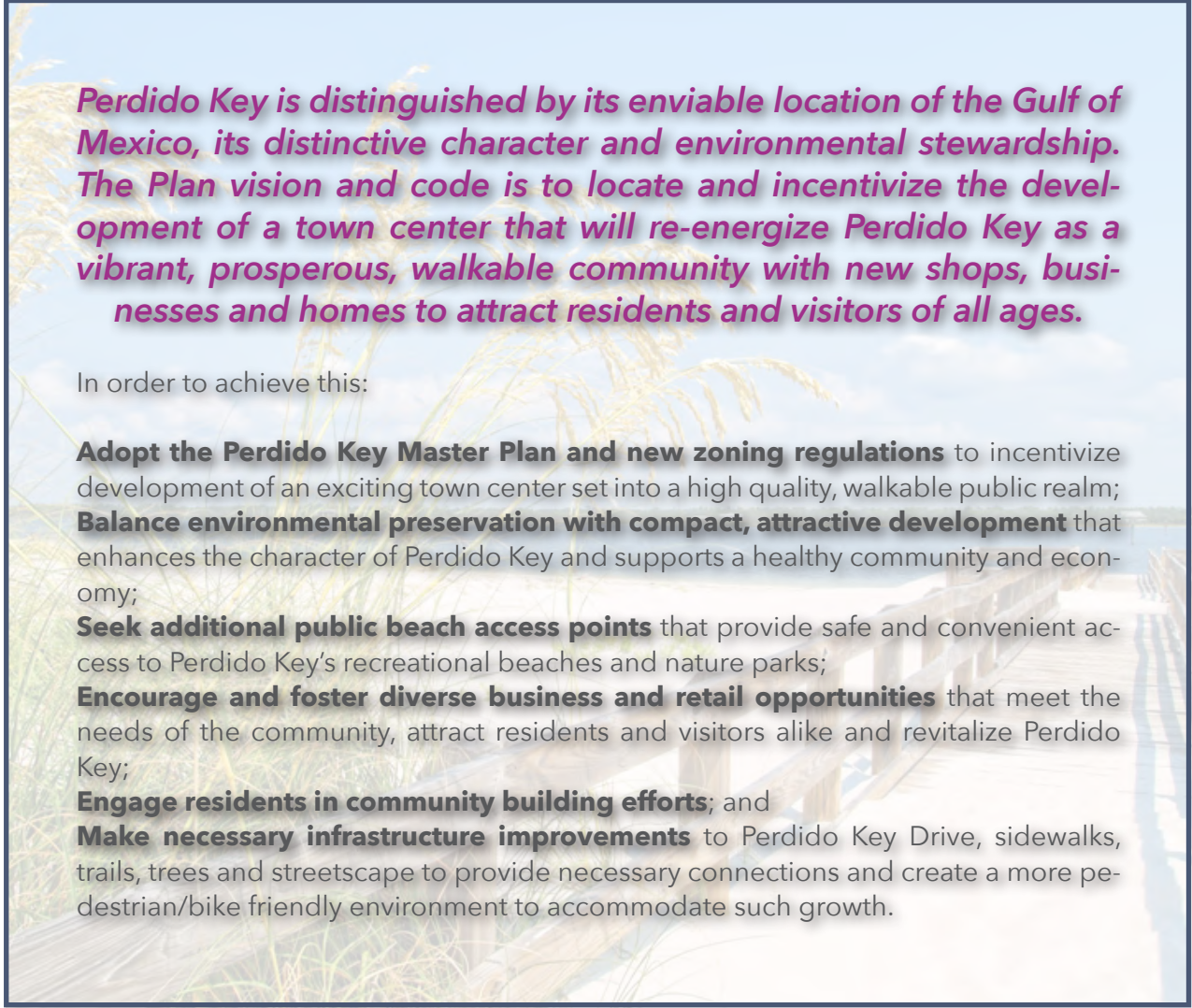
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Perdido Key is distinguished by its enviable location of the Gulf of Mexico, its distinctive character and environmental stewardship. The Plan vision and code is to locate and incentivize the development of a town center that will re-energize Perdido Key as a vibrant, prosperous, walkable community with new shops, businesses and homes to attract residents and visitors of all ages.

In order to achieve this:

Adopt the Perdido Key Master Plan and new zoning regulations to incentivize development of an exciting town center set into a high quality, walkable public realm;

Balance environmental preservation with compact, attractive development that enhances the character of Perdido Key and supports a healthy community and economy;

Seek additional public beach access points that provide safe and convenient access to Perdido Key's recreational beaches and nature parks;

Encourage and foster diverse business and retail opportunities that meet the needs of the community, attract residents and visitors alike and revitalize Perdido Key;

Engage residents in community building efforts; and

Make necessary infrastructure improvements to Perdido Key Drive, sidewalks, trails, trees and streetscape to provide necessary connections and create a more pedestrian/bike friendly environment to accommodate such growth.

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PROJECT BRIEF

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This charrette was the second DPZ-led charrette for Perdido Key in the past three years. This most recent one built on, and evolved the collective vision plan originally conceived in the initial charrette in October 2012. Previous studies, and additional base data and information were collected and analyzed prior to the charrette.

The drawings and illustrations included in this Report are the result of a DPZ-led four-day public charrette held in Perdido Keys Fire Station & Visitor Center from October 5 - 9, 2015.

A charrette is an intensive planning workshop wherein designers and stakeholders collaborate on a shared vision for development. It provides a forum for ideas and offers the unique advantage of giving real-time feedback to the designers as planning proposals are developed. More importantly, it allows participants to be contributors to the Plan.

DPZ Partners (DPZ) led a team comprised of the following consultants, herein after referred to as the DPZ Team.

- Hall Planning & Engineering: for transportation planning;
- Biome Consulting Group: for Environmental Assessment;
- Gibbs Planning Group: for market analysis and positioning; and
- Fabre Engineering & Surveying: for infrastructure and engineering.

The DPZ Team, Escambia County's Development Services Department and the Perdido Key Association (PKA) jointly kicked-off the charrette. Upon arrival, the DPZ Team toured Perdido Key, while documenting its character. The subsequent days were spent designing and discussing multiple town center alternatives for the site, as well as sketching an architectural character fitting for Perdido Keys history and climate. As a public and open charrette, interested residents and stakeholders were invited to drop by the studio during the entire week to provide input or catch up on design ideas. Additionally, there were two key presentations of the master plans: a mid presentation on day two and a final charrette presentation on day four.

Charrette Information		Monday October 5, 2015	Tuesday October 6, 2015	Wednesday October 7, 2015	Thursday October 8, 2015	Friday October 9, 2015
Team	8:00 am	Team Travel to Perdido Key	Breakfast	Breakfast	Breakfast	Breakfast
DPZ Partners Marina Khoury, Project Director Mike Weich, Project Manager Mike Huston, Sr. Designer Heather Smith, Designer Greg Littell, Designer Chris Ritter, Illustrator Tom Low, Sr. Designer	9:00 am		DPZ Team Briefing	DPZ Team Briefing	DPZ Team Briefing	DPZ Team Briefing
	10:00 am		Concurrent Design Session/Meetings As Needed	Concurrent Design Session/Meetings As Needed	Design / Production	Client Team Meeting #2: Next Steps / Path Forward
	11:00 am					
	Noon					
Sub-Consultants						
Hall Planning Engineering - HPE Rick Hall	1:00 pm	Set-Up Studio	Lunch in	Lunch in	Lunch in	DPZ Team departs
Gibbs Planning Group - GPG Robert Gibbs (Oct 5 - 6)	2:00 pm	Client Team Meeting # 1: Project Briefing	Design Session	Design Session	Design / Production	
Biome Consulting Group - BCG Glen Miley Fabre Engineering Frank Fabre	3:00 pm	Site Tour & Surrounding Area				
Client	4:00 pm	Stakeholder/City Staff & Officials Meeting	Public Informal Open House	Final Charrette Presentation		
Escambia County Development Services Department Juan Lemos	5:00 pm					
Charrette Studio Perdido Key Fire Station 15500 Perdido Key Dr. Pensacola, FL 32507	6:00 pm	Design Session	Client / DPZ Progress Review	Dinner out		
Charrette Presentations Perdido Bay Community Center 13660 Innerarity Point Rd, Pensacola, FL 32507	7:00 pm	Dinner out	Dinner in			
	8:00 pm		Dinner out		Design / Production	
	9:00 pm					

Charrette Schedule

CHARRETTE PROCESS

PROJECT BRIEF

Shown here are photos from the charrette.



COMMUNITY SURVEY RESULTS

PROJECT BRIEF

The PKA commissioned their second property owners survey in 2015. The first was conducted in 2011 with a goal to use residents answers in defining the master plan objectives. Out of 3,285 surveys, 776 (24%) were returned. A summary of significant findings are outlined below, comparing the results to the 2011 survey.

QUESTIONS REGARDING PLANNING & ZONING	2011	2015
DWELLING CAP OF 7150 UNITS	78% agree on 7150 cap	49.0% About Right 25.8% too high 10.1% way too high
RESIDENTIAL VS COMMERCIAL	60% more residential	41.6% residential focus 42.7% mixed-use focus
DWELLING CAP OF 100 - HOTEL/MOTEL, ETC.	78% agree on cap of 1000	37.4% about right 33.1% too high 17.0% way too high
USE OF PLANNING & ZONING TOOLS & GIVING PROPERTY OWNERS INPUT PRIOR TO APPROVAL	No percentage but positive response to owners having input	72.4% very important 23.1% important
RATE IMPORTANCE OF LOW POPULATION DENSITY	Value seen by residents for low density	65.3% very important 23.6% important
MASTER PLAN NEEDED TO GUIDE FUTURE GROWTH	83% in favor	50.3% strongly agree 33.4% agree
QUESTIONS REGARDING PUBLIC WATERFRONT	2011	2015
PERDIDO KEY NEEDS MORE BEACH ACCESS LOCATIONS FOR THE GENERAL PUBLIC	78% do not need additional access	14.0% agree 21.9% neutral 29.9% disagree 26.5% strongly disagree
MORE SUPPORT NEEDED FOR PUBLIC FISHING PIER/BOAT RAMP	35% in favor	19.3% agree 25.3% neutral 20.4% disagree 24.2% strongly disagree
I SUPPORT ENERGY DRILLING PLATFORMS OFF PERDIDO KEY	Majority satisfied with status quo	16.6% disagree 57.7% strongly disagree
QUESTIONS REGARDING NATURAL RESOURCE PROTECTION	2011	2015
RESIDENTS BELIEVE PARKS TO BE IMPORTANT	76% agree	42.0% important 35.1% very important
RESIDENTS REPORTED ENVIRONMENT INCLUDING ENDANGERED SPECIES SHOULD BE PROTECTED	64% agree	30.0% strongly agree 34.5% agree
PK NEEDS BETTER WILDLIFE FRIENDLY LIGHTING	Not reported	13.0% strongly agree 27.7% agree 9.8% neutral

COMMUNITY SURVEY RESULTS

PROJECT BRIEF

QUESTIONS REGARDING UTILITIES/PUBLIC INFRASTRUCTURE	2011	2015
IN FAVOR OF BURYING ELECTRICAL/COMMUNICATION LINES ALONG PK DRIVE	87% agree	47.0% strongly agree 40.6% agree 9.8% neutral
IN FAVOR OF RENOVATING EXISTING FIRE STATION RATHER THAN BUILDING A NEW ONE	69% agree	Result not in current survey
QUESTIONS REGARDING UTILITIES/PUBLIC INFRASTRUCTURE	2011	2015
INTEREST EXPRESSED IN SUPPORTING PROPER STORM WATER DRAINAGE TO PROTECT LOCAL WATERWAYS	No percentage but in favor of	40.2% strongly agree 44.3% agree 10.0% neutral
BELIEVE PK NEEDS CURB-SIDE RECYCLING PROGRAM FOR CONDOS AND COMMERCIAL ESTABLISHMENTS	No percentage	41.6% residential focus 42.7% mixed-use focus
QUESTIONS REGARDING TRANSPORTATION & HURRICANE EVACUATION	2011	2015
IN FAVOR OF KEEPING PK DRIVE AS A TWO-LANE ROAD AND ADDING TURN LANES AS NEEDED	67% agree	43.7% strongly agree 33.8% agree 6.4% neutral 7.7% disagree 6.3% strongly disagree
PK DRIVE MUST BE MADE MORE BICYCLE AND PEDESTRIAN FRIENDLY WITH OFF-ROAD SAFETY A PRIORITY	No percentage but in favor of	38.2% strongly agree 39.3% agree 15.5% neutral 5.0% disagree
PK DRIVE MUST REMAIN AT 45 MPH SPEED LIMIT	81% agree	10.8% be slower 7.1% be faster 80.9% remain the same
PK NEEDS MORE PUBLIC PARKING	No reporting	29.9% strongly agree 22.3% agree 27.3% disagree 15.7% strongly disagree
I BELIEVE PK NEEDS TRAFFIC SIGNALS AT BUSY INTERSECTIONS	No reporting	12.1% strongly agree 32.5% agree 25.4% neutral 21.5% disagree 6.6% strongly disagree
I BELIEVE PK DRIVE NEEDS MORE PEDESTRIAN CROSSWALKS	No reporting	21.0% strongly agree 37.6% agree 27.4% neutral 9.8% disagree
SATISFIED WITH ABILITY TO EVACUATE PK PRIOR TO OR DURING A STORM	Generally Satisfied	19.2% strongly agree 51.2% agree 17.7% neutral 8.5% disagree

Below is the summary of the highest priority results from the Community Survey and these objectives were used in the refinement of the Perdido Key master plan.

- Generally satisfied with level of public services;
- Some believed they contribute more in taxes than the services they receive;
- Strongly supported a master plan for intelligent development;
- Strongly supported efforts to protect the environment & endangered species;
- Strongly supported creation of more and better pedestrian and bicycle trails;
- Support more restaurants & slightly less so, more entertainment options;
- Very opposed to casinos and bingo parlors;
- Strongly supported beach nourishment, but struggled with issues of property easements and possible use of eminent domain to conduct the nourishment;
- Most expressed desire to continue to live, work, and play in Perdido Key;



SCALE COMPARISONS

PROJECT BRIEF

A greater understanding of local context begins with an exploration of existing or similar settlements from contemporary developments in the region. Such scale comparisons are an effective tool used by planners to demonstrate similarities in the size and character of existing and recognized towns and communities to the site in question.

For this project, the retail core of Seaside was highlighted and super-imposed over one of the preferred areas for retail, to help give an idea of the scale of retail envisioned for Perdido Key. While a conservative estimate of 85,000 s.f. of new retail is viable for Perdido Key, Seaside currently has 60,000 s.f., illustrating the areas ability to physically accommodate a significant amount of retail.

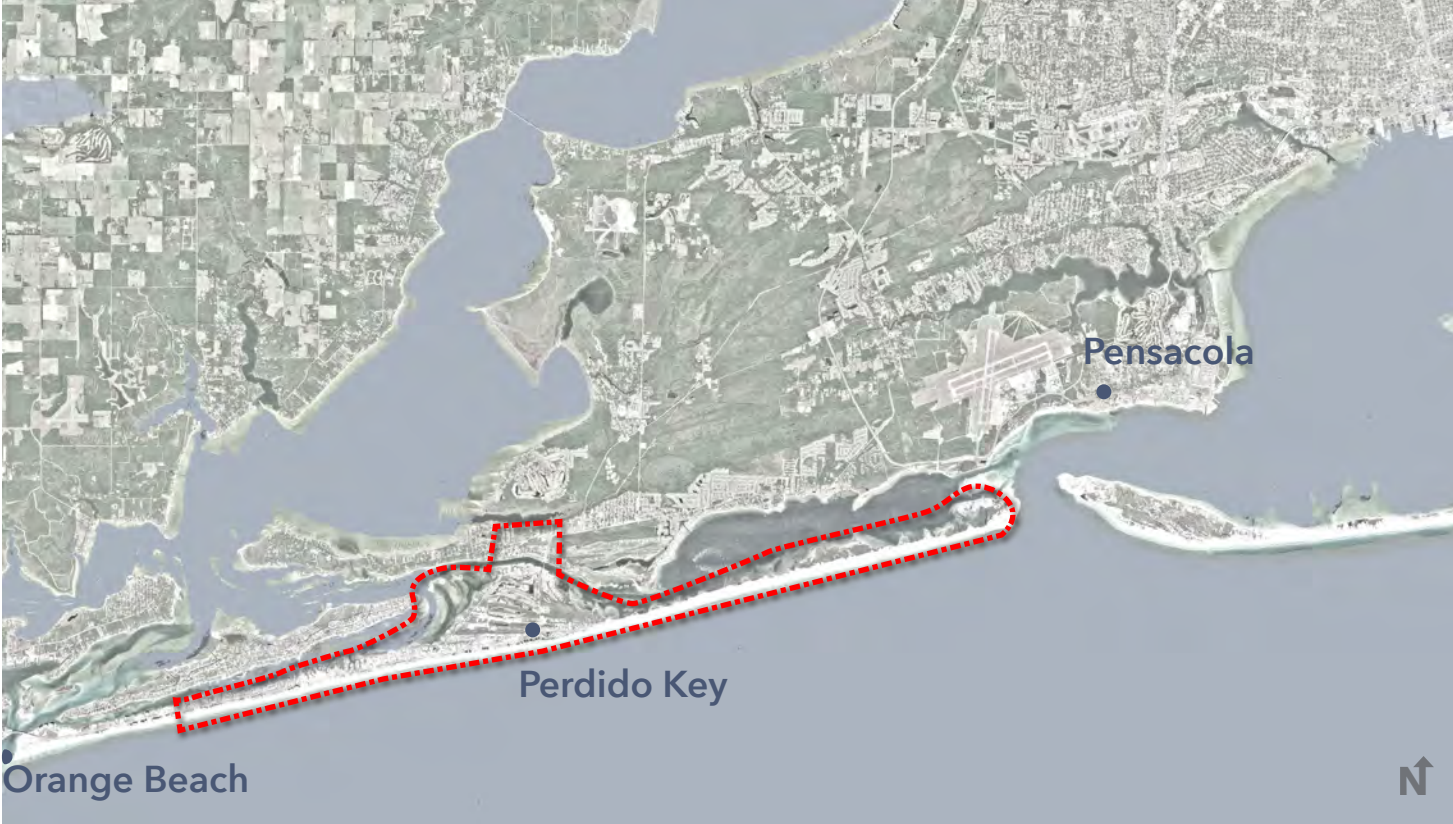




EXISTING CONDITIONS ANALYSIS

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REGIONAL CONTEXT



The Perdido Key Study Area, highlighted above is comprised of 2,900 acres.

PROJECT SITE & CONTEXT

EXISTING CONDITIONS ANALYSIS

PERDIDO KEY BEACH ACCESS



- Public Beach
- Private Beach

Despite the abundant open space conservation areas and Nature Parks, one of the more persistent community concerns identified was the lack of public beach access on Perdido Key. Poor access is compounded by the fact that, where it is provided, there is a general lack of parking and the opening hours are too restrictive.

The diagrams above illustrate that the public beaches are actually over 8 miles long (+64% of Perdido Key's beach frontage), even if sections of the beaches have restricted access such as the dunes and critical habitat areas. However, the public beach access points are not ideally situated for either non-beachfront residents, or visitors looking for convenient access. A goal of the master plan was to identify additional key access points and/or improving existing ones, especially if they can connect to proposed town center locations.

EXISTING CONDITIONS SUMMARIZED

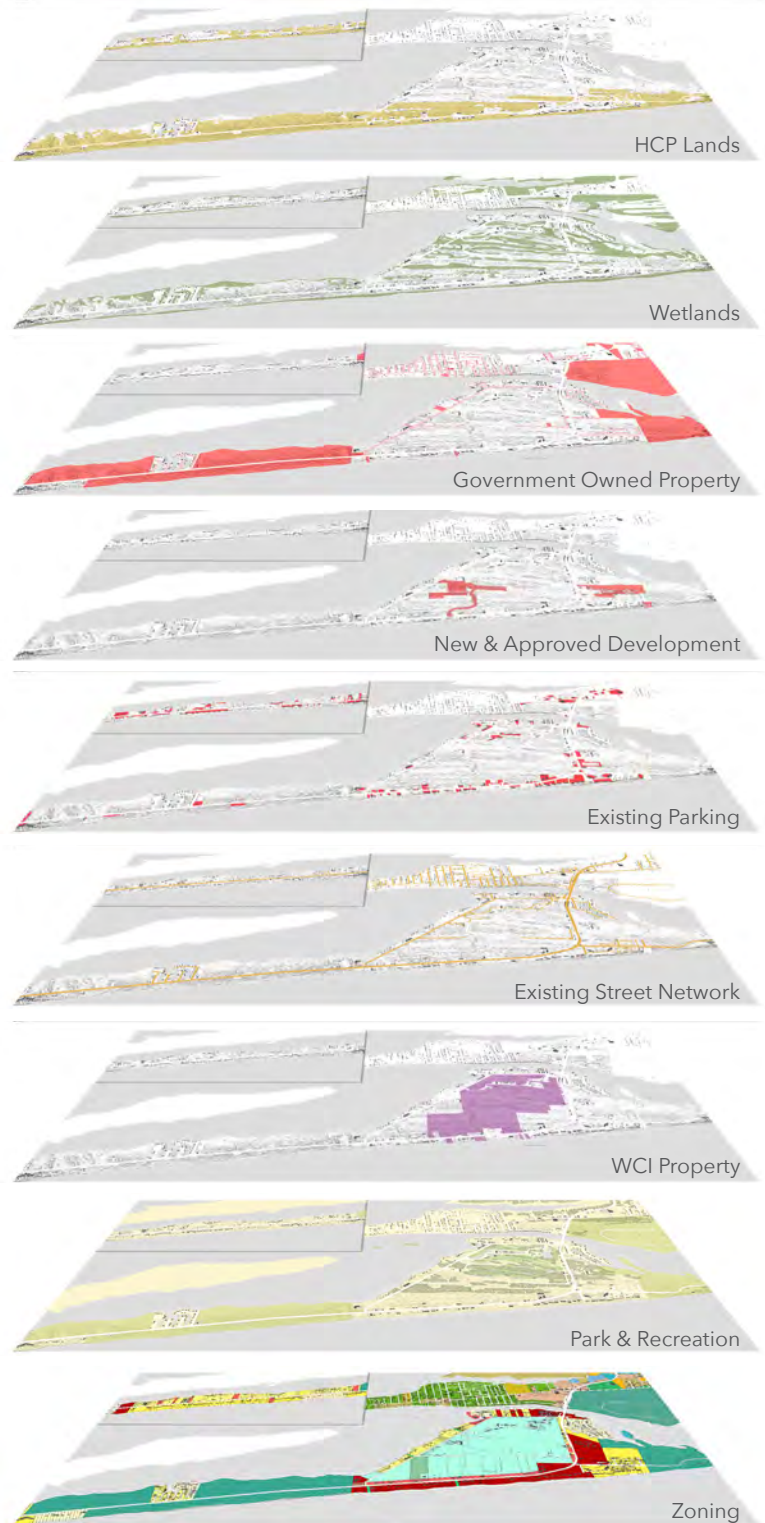
There are an unusually large number of existing conditions and development constraints to consider on Perdido Key. These are itemized here, as separate layers, and also each shown in detail on the following pages.

In order to fully assess the cumulative effect of these constraints, we layered them sequentially to evaluate how much land is actually available, unencumbered and available for development so as to better identify the most likely areas for locating the town center.

Lastly, Perdido Key also has a state-imposed cap on the total number of dwelling units permitted that it cannot exceed. This figure is in constant flux, however as the table below indicates, Perdido Key is currently less than 55% built out, notwithstanding all pending development rights and orders.

Total Dwelling Cap	%
7,150 units	100%
As of May 2015	
3,832 units built	53.5%
401 units with development rights	5.6%
492 units with development orders	6.9%
1,132 units with WCI	15.8%
Dwelling Units Remaining as of October 5, 2015	
1,293	18%

This section concludes with a map of “Constraints & Opportunities” that superimpose the major environmental and HCP constraints onto one map, allowing properties without the above-noted constraints to more easily be identified. A significant portion of these available lands are held by WCI, one of the largest property owners on the Key. This map is by no means an indication of the only available lands for development. Any property owner can choose to redevelop their property and mitigate the environmental conditions appropriately as required by law. The map was solely used to more easily identify possible town center locations.

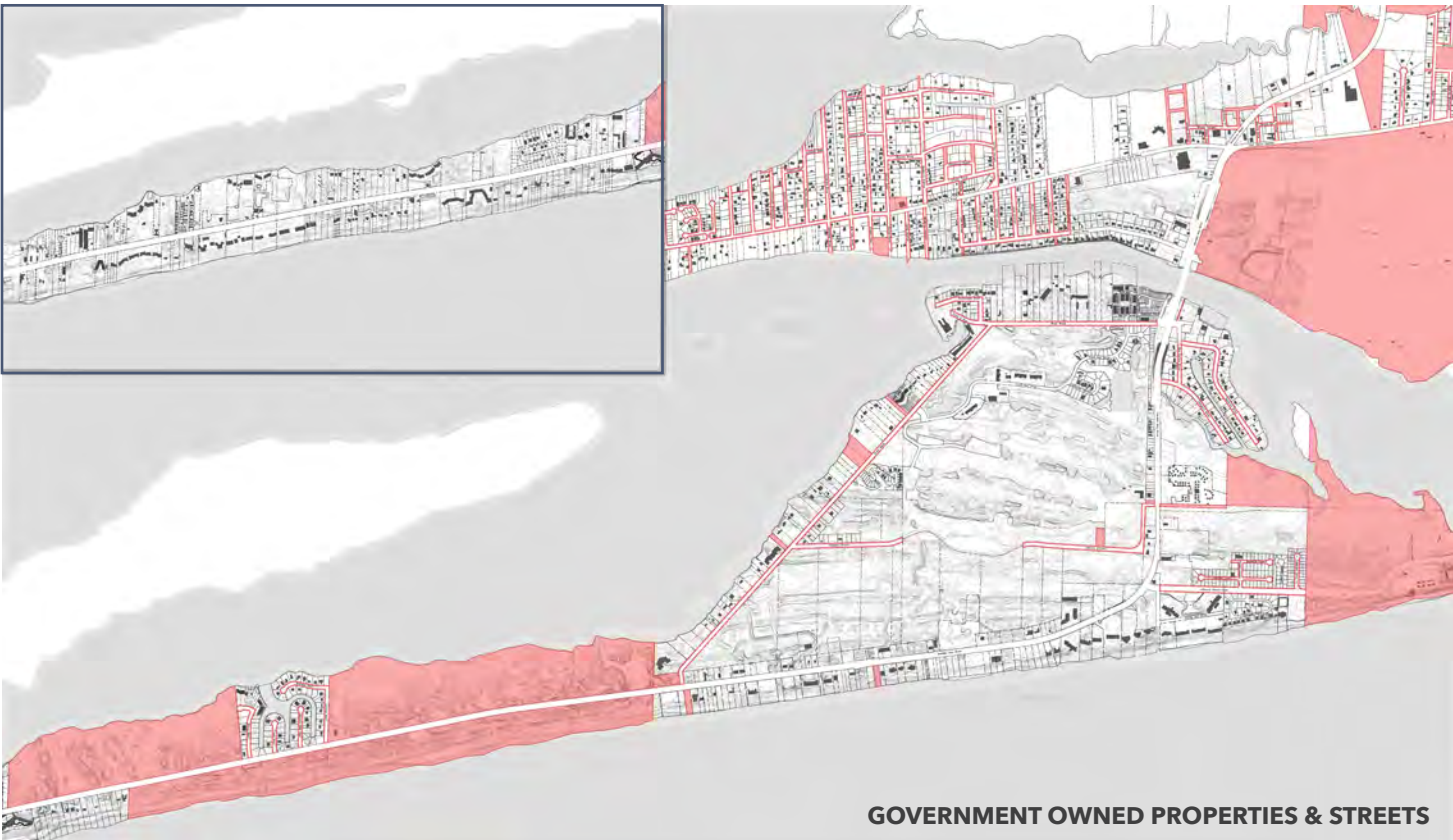


SITE CONDITIONS

EXISTING CONDITIONS ANALYSIS



SITE CONDITIONS
EXISTING CONDITIONS ANALYSIS



GOVERNMENT OWNED PROPERTIES & STREETS



NEW & APPROVED DEVELOPMENT

SITE CONDITIONS

EXISTING CONDITIONS ANALYSIS



SITE CONDITIONS

EXISTING CONDITIONS ANALYSIS



HCP IMPACTS

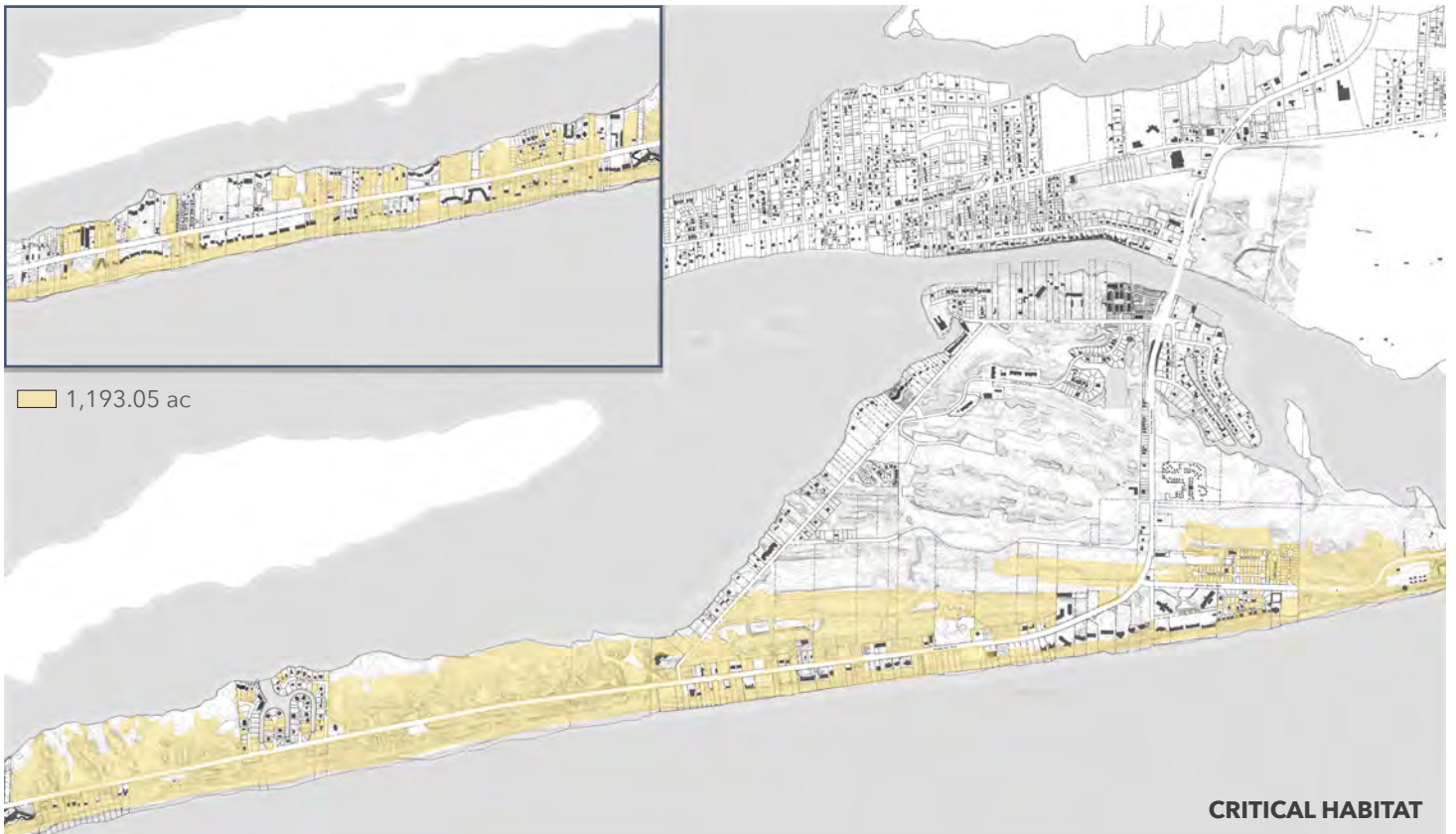
EXISTING CONDITIONS ANALYSIS

Escambia County successfully negotiated an innovative Habitat Critical Plan (HCP) with the US Department of Fisheries and Wild Life, allowing the County to allow up to 66 acres of critical habitat land to be impacted over the next 30 years. This Plan allows the County to issue development permits to developers whose land contains critical habitat within a rapid 30-day time-frame instead of multi-year, time-consuming process.

The HCP has additional strict limitations for the issuance of permits, which include:

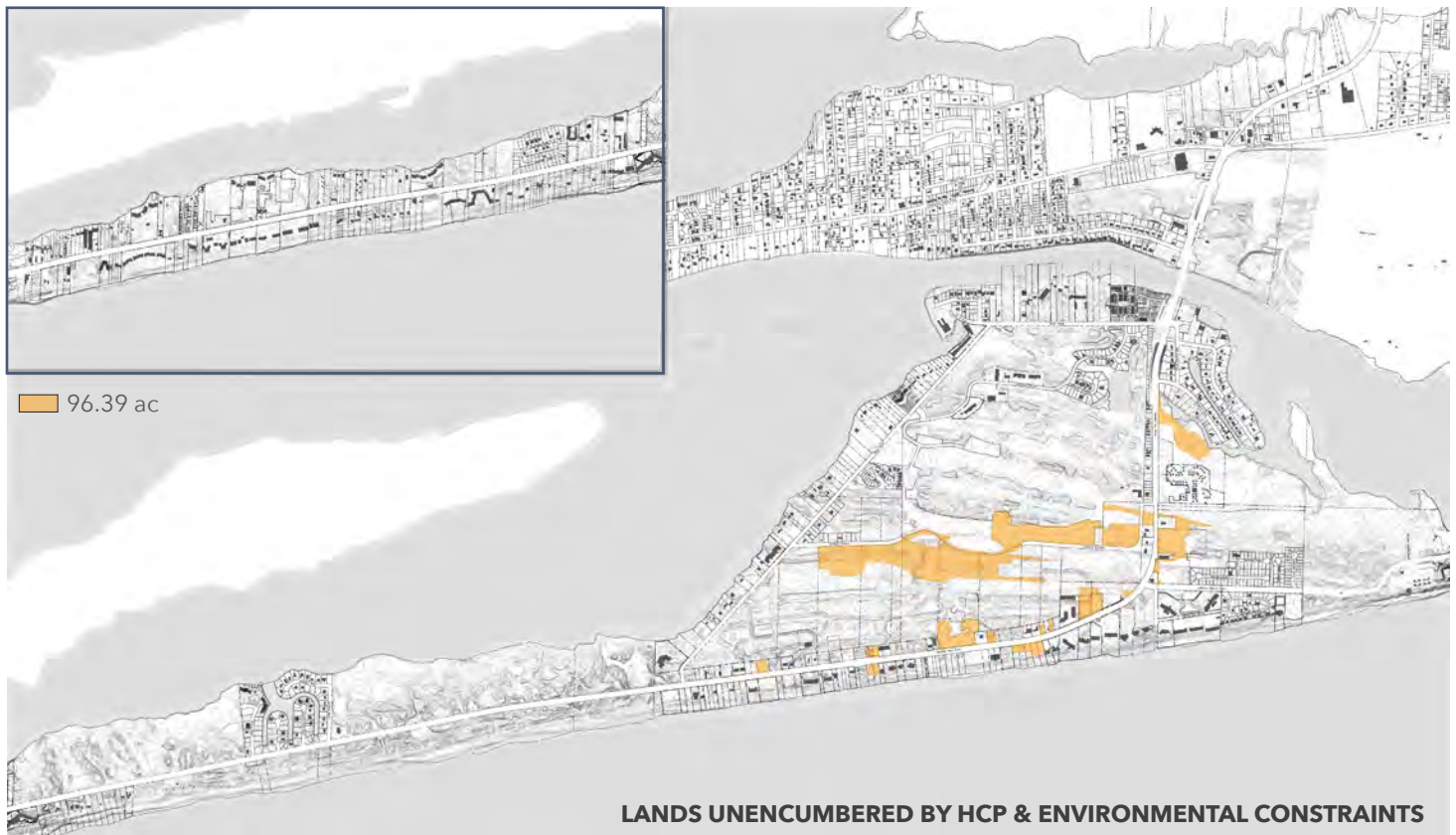
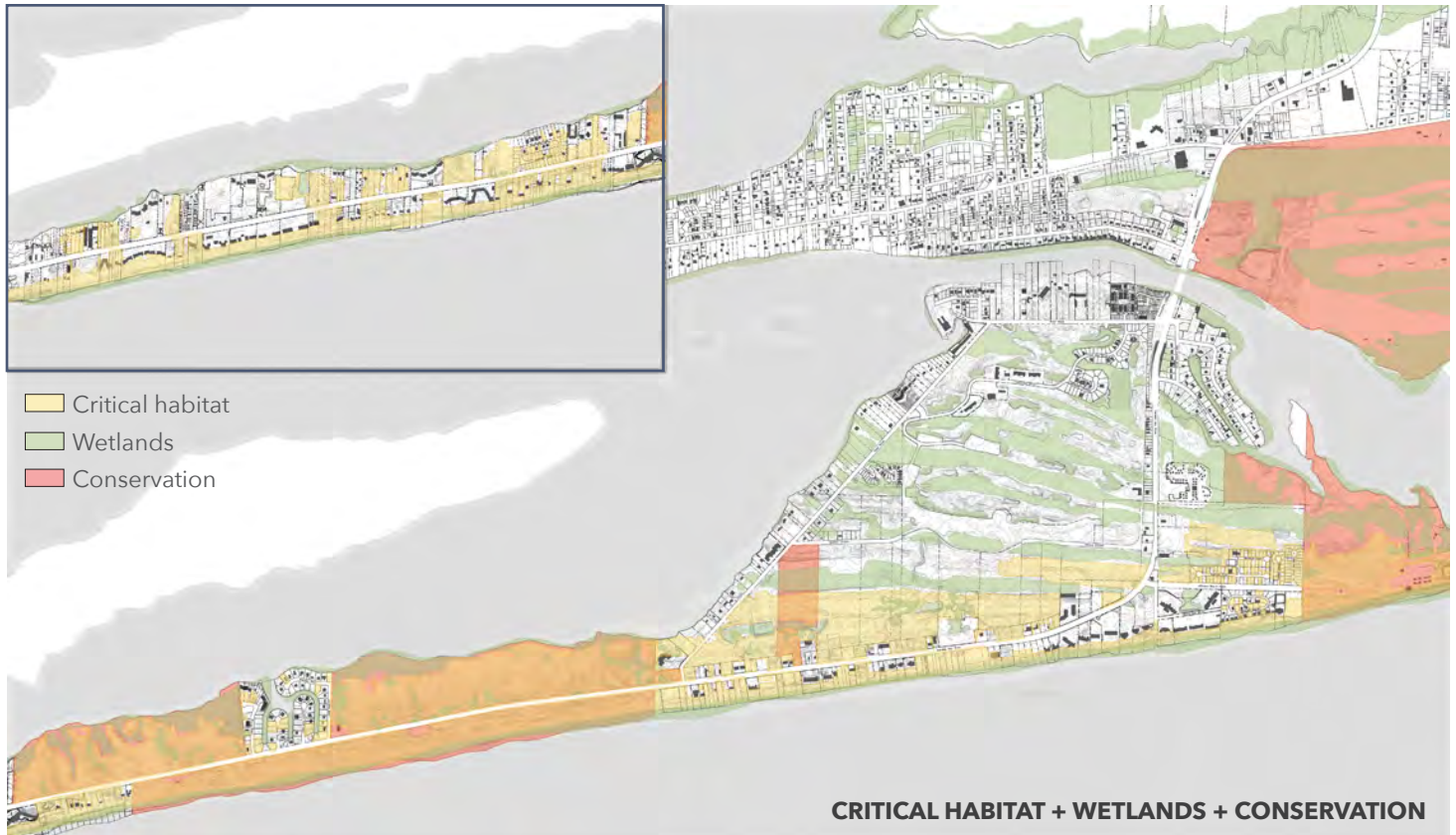
- A maximum of 11 acres every 5 years to ensure not all permits are given out at once;
- A maximum allowance per zoning district to ensure a fair distribution across the Key; (see table below)
- A maximum lot coverage / plot, generally summarized by “up to 50% north of Perdido key Drive, and up to 25% south of Perdido Key drive”;
- Sequential mitigation procedures, which include: avoidance where possible, minimization where impacts do occur and compensation equal to \$100,000/acre of impacted critical habitat; and
- Studies showing that the Perdido Key mouse is continuing to thrive over time, despite the federally issued allowance.

CUMULATIVE HABITAT TAKE ALLOWED BY ZONING DISTRICT						
ZONING DISTRICT	YEAR 5	YEAR 10	YEAR 15	YEAR 20	YEAR 25	YEAR 30
LDR	0.2	0.4	0.6	0.9	1.1	1.3
MDR	0.8	1.5	2.3	3.0	3.8	4.5
HDR	2.0	4.1	6.1	8.2	10.2	12.3
PR-PK	5.6	11.2	16.8	22.5	28.1	33.7
COM-PK	0.9	1.8	2.7	3.6	4.5	5.4
CC-PK	1.4	2.9	4.3	5.8	7.2	8.7
CG-PK	0.0	0.0	0.1	0.1	0.1	0.1
TOTAL	10.9	21.9	32.9	44.1	55.0	66.0



CONSTRAINTS & OPPORTUNITIES

EXISTING CONDITIONS ANALYSIS



EXISTING ZONING DISTRICTS ANALYSIS

EXISTING CONDITIONS ANALYSIS

This table summarizes the main characteristics of all of Perdido Key's Zoning Districts.

SUMMARY CHART: PERDIDO KEY'S EXISTING ZONING DISTRICTS				
ZONING INFO.	LDR-PK	MDR-PK	HDR-PK	Com-PK
INTENT				
Intent of Zoning District	Low density residential uses , allowing non-residential uses compatible with residential neighborhoods and natural resources of island.	Medium density residential uses , allowing non-residential uses compatible with residential neighborhoods and natural resources of island.	High density residential areas with compatible low intensity office and other retail service facilities.	Commercial: Provide for retailing of commodities and furnishing of selected services intended to encourage essential neighborhood commercial services while protecting neighboring residential properties from adverse impacts
BUILDING DISPOSITION				
Lot Area (min)	None	None	None	None
Lot Width (min.)	Except cul-de-sac lots: 20', SF: 40' @ front bldg line & ROW lines, 2-family: 50'/80' respectively, Townhouses & MF: 100' at BL.	Except cul-de-sac lots: 20', SF: 40' @ front bldg line & ROW lines, 2-family: 50'/80' respectively, Townhouses & MF: 100' at BL.	Except cul-de-sac lots: 20', SF: 40' @ front bldg line & ROW lines, 2-family: 50'/80' respectively, Townhouses & MF: 100' at BL.	Except cul-de-sac lots: 20', SF: 40' @ front bldg line & ROW lines, 2-family: 50'/80' respectively, Townhouses & 2,3, 4-fam 100' at BL., none for MF
Lot Coverage (min / max)	30% min. pervious / 70% max. semi-pervious	30% min. pervious / 70% max. semi-pervious	30% min. pervious / 70% max. semi-pervious	25% min. pervious / 75% max. semi-pervious & pervious. Building area: 25% max. for buildings taller than 2.5 stories.
Open Space (min.)	35%	35%	35%	25% pervious
FAR	1.0	1.0	1.0	1.0
Density (du/acre)	2 max.	4.5 max.	12 max.	3 max. / TDRs available to/from other comm. zones
SETBACKS				
Front (min)	25'	25'	20'	20' for SF, 2, 3 & 4-fam. / 15' for +4 MF and all other uses.
Side (min)	5' or 10% lot width, whichever greater, but no need to exceed 15'. THs required 10' at end-unit.	5' or 10% lot width, whichever greater, but no need to exceed 15'. THs required 10' at end-unit.	5' or 10% lot width, whichever greater, but no need to exceed 15'. THs required 10' at end-unit.	5' each side, and 10' min. for transition to commercial. THs required 10' at end-unit.
Rear (min)	10% lot depth or 25' max.	10% lot depth or 25' max.	10% lot depth or 25' max.	15' min.
BUILDING HEIGHT				
Building Height	35' max. aff.	4 stories max. or 2 stories less than +4 adj (before 1997), whichever greater	8 stories max. or 2 stories less than +8 adj. (before 1997), , whichever greater	4-stories max.
BUILDING USE (Permitted & Conditional Uses)				
Residential	Permitted (SF, 2-fam, MF)	Permitted (SF, 2-fam, MF)	Permitted (SF, 2-fam, MF)	Permitted (SF, 2-fam, MF)
Retail Sales and Services	Prohibited	No sales, Only child care facilities	No sales, Retail services permitted, incl: child care facilities, professional services, restaurants if on condo property	Permitted
Public & Civic	Permitted, with conditions	Permitted, with conditions	Permitted, with conditions	Permitted, with conditions
Recreational & Entertainmt.	Private marinas only	Private marinas only	Private marinas only	Permitted, with conditions
Lodging	Prohibited	Prohibited	Prohibited	Permitted (B&B only)
Office	Prohibited	Prohibited	Permitted (Prof. Office)	Permitted (Prof. Office)
Educational	Prohibited	Prohibited, ex. Kindergarten	Prohibited, ex. Kindergarten	Permitted

EXISTING ZONING DISTRICTS ANALYSIS

EXISTING CONDITIONS ANALYSIS

SUMMARY CHART: PERDIDO KEY'S EXISTING ZONING DISTRICTS				
ZONING INFO.	CC-PK	CG-PK	PR-PK	Rec-PK
INTENT				
Intent of Zoning District	Commercial Core: Mixed-use development encouraged: primarily for high-density residential & lodging development and retailing of resort-related commodities & services.	Commercial Gateway: Gateways to Perdido Key, providing an identity for Perdido Key as a visually attractive, family style, resort community. Characterized by resort-related commercial uses and high-density residential & lodging development.	Planned Resort: Large-scale planned resort district; allowing for destination-type mixed uses that include residential & hotel development and supporting recreational & commercial facilities within a developer master plan. Must include extensive open space, creative design, multi-modal circulation network and adequate buffering.	Recreation District: Preserve and maintain lands for outdoor recreations uses and open space.
BUILDING DISPOSITION				
Lot Area (min)	None	None	10-acres	None
Lot Width (min.)	Except cul-de-sac lots: 20', SF: 40' @ front bldg line & ROW lines, 2-family: 50'/80' respectively, Townhouses 100' at BL., none for MF & other commercial uses	Except cul-de-sac lots: 20', SF: 40' @ front bldg line & ROW lines, 2-family: 50'/80' respectively, Townhouses 100' at BL., none for MF & other commercial uses	Except cul-de-sac lots: 20', SF: 40' @ front bldg line & ROW lines, 2-family: 50'/80' respectively, Townhouses 100' at BL., none for MF & other commercial uses	None
Lot Coverage (min / max)	30% min. pervious / 70% max. semi-pervious & pervious for all residential up to 4-fam MF. 20% pervious / 80% max. semi-impervious & impervious for all other uses.	30% min. pervious / 70% max. semi-pervious & pervious for all residential up to 4-fam MF. 15% pervious / 85% max. semi-impervious & impervious for all other uses. + other conditions	40% max of development parcel 30% min. pervious / 70% max. semi-pervious & pervious for all residential up to 4-fam MF. 15% pervious / 85% max. semi-impervious & impervious for all other uses + other	80% min. pervious / 20% max. semi-pervious
Open Space (min.)	20% pervious	15% pervious	30% + 50% min. front yard	None.
FAR	6.0	6.0	6.0	1.0
Density (du/acre)	13 max.& 25 lodging max. / TDRs available to/from other comm. zones	12.5 max.& 25 lodging max. / TDRs available to/from other comm. zones	5 max.& 25 lodging max. / TDRs available to/from other comm. zones	None/ limited to vested development only
SETBACKS				
Front (min)	20' min.	20' min.	20' min. + 50' min. from public ROW	25'
Side (min)	5' each side, and 10' min. for transition from residential to commercial. THs required 10' at end-unit.	5' each side, and 10' min. for transition from residential to commercial.	10' min.	5' or 10% lot width, whichever greater, but no need to exceed 15'.
Rear (min)	15' min.	15' min.	15' min.	25'
BUILDING HEIGHT				
Building Height	30 stories max. for hotels, 20 stories for all other buildings.	10-stories max.	10 stories max.	None.
BUILDING USE (Permitted & Conditional Uses)				
Residential	Permitted (SF, 2-fam, MF)	Permitted (SF, 2-fam, MF)	Permitted (SF, 2-fam, MF)	Prohibited
Retail Sales and Services	Permitted	Permitted	Permitted	Prohibited, except for retail incidental to recreational uses
Public & Civic	Permitted, with conditions	Permitted, with conditions	Permitted, with conditions	Permitted, with conditions
Recreational & Entertainmt.	Permitted	Permitted	Permitted	Permitted, with conditions
Lodging	Permitted (25 u/ac max.)	Permitted (25 u/ac max.)	Permitted (25 u/ac max.)	Prohibited
Office	Permitted	Permitted	Permitted	Prohibited
Educational	Permitted	Prohibited	Prohibited	Prohibited

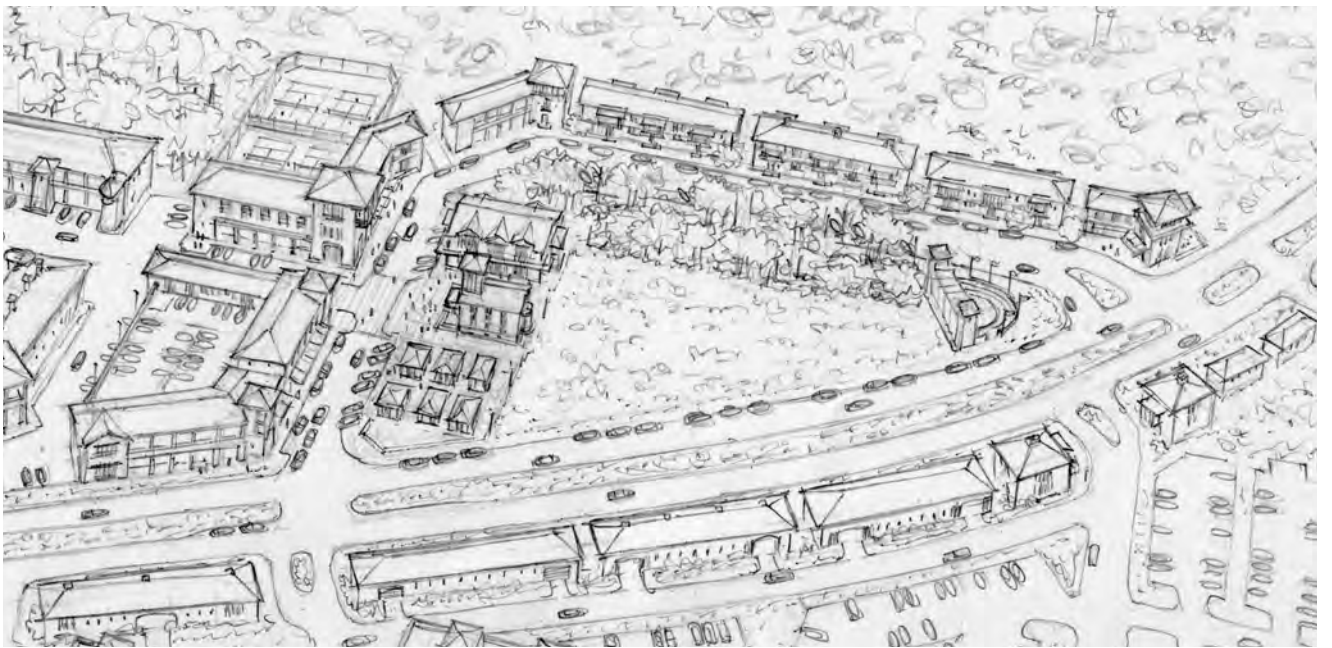
EXISTING ZONING DISTRICTS NOTES

EXISTING CONDITIONS ANALYSIS

SUMMARY CHART: PERDIDO KEY'S EXISTING ZONING DISTRICTS				
ZONING INFO.	LDR-PK	MDR-PK	HDR-PK	Com-PK
NOTES				
Additional Notes	<p>Permitted Public & Civic Uses: Offices for govt. workers with max 6,000 sf/lot. Places of worship, public utility structures.</p> <p>Conditional Rec. Uses: golf course, tennis center, pools, recreational facilities associated with country clubs.</p>	<p>Permitted Public & Civic Uses: Kindergarten, Offices for govt. workers with max 6,000 sf/lot. Places of worship, public utility structures. Conditional Rec. Uses: golf course, tennis center, pools, recreational facilities associated with country clubs.</p>	<p>Permitted Public & Civic Uses: Kindergarten, Offices for govt. workers with max 6,000 sf/lot. Places of worship, public utility structures & warehouses for civic/public use only. Conditional Rec. Uses: golf course, tennis center, pools, recreational facilities associated with country clubs.</p>	<p>Permitted Public & Civic Uses: Kindergarten, Education facilities, including K-12, Offices for govt. workers with max 6,000 sf/lot. Places of worship, public utility structures & warehouses for civic/public use only. Conditional Rec. Uses: campgrounds, commercial recreation, entertainment and amusement facilities.</p>
				<p>Uses: No alcohol sales, bars and night-clubs within 100' of residential areas.</p>

SUMMARY CHART: PERDIDO KEY'S EXISTING ZONING DISTRICTS				
ZONING INFO.	CC-PK	CG-PK	PR-PK	Rec-PK
NOTES				
Additional Notes	<p>Permitted Public & Civic Uses: Kindergarten, Education facilities, including K-12, Offices for govt. workers with max 6,000 sf/lot. Places of worship, public utility structures & warehouses for civic/public use only. No Conditional Uses permitted.</p>	<p>Permitted Public & Civic Uses: Kindergarten, Education facilities, including K-12, Offices for govt. workers with max 6,000 sf/lot. Places of worship, public utility structures & warehouses for civic/public use only. personal storage areas. No Conditional Uses permitted.</p>	<p>Permitted Public & Civic Uses: Kindergarten, Education facilities, including K-12, Offices for govt. workers with max 6,000 sf/lot. Places of worship, public utility structures & warehouses for civic/public use only. No Conditional Uses permitted.</p>	<p>Permitted Public & Civic Uses: Bird & wildlife sanctuaries, parks and greenbelt areas, public utility structures. Permitted recreational & Entertainment Uses: recreational facilities, parks, playgrounds, walking/hiking trails, off-road vehicle trails, swimming pools, baseball fields, tennis courts, golf courses. Marinas for commercial use only.</p>
	<p>Uses: No bars and night-clubs within 100' of residential areas.</p>	<p>Uses: No alcohol sales, bars and night-clubs within 100' of residential areas.</p> <p>Additional footprint regulations: based on height (19% - 25% lmax. ot coverage range).</p>	<p>Uses: No alcohol sales, bars and night-clubs within 100' of residential areas.</p>	

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MASTER PLAN

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Following the 2012 initial charrette and subsequent master plan report submitted in early 2013 by DPZ, there have been many changes to the physical, political and permitting landscape of Perdido Key. As a consequence, the development of the master plan options was altered to reflect these new realities. They include:

1. A new Escambia County Commissioner, Doug Underhill, was elected to represent Perdido Key, with his top priority being to develop a master plan for the Key.
2. The Habitat Critical Plan was adopted in early 2015 and has already begun to spur development on the Key, the permitted process has been greatly streamlined.
3. The 4-laning of Perdido Key Drive had much less emphasis than during 2012 as the TIP priorities have shifted to make Perdido key Drive a more pedestrian and bicycle-friendly thoroughfare.
4. WCI as a significant property owner has moved forward with their original master plan to expand the Lost Key Resort. For many reasons, their plan was not aligned with area recommendations that came out of the 2012 charrette, the most impactful of which was the suggested connection of Semmes Rd from River Rd to Perdido Key Dr.
5. The provision of beach-front hotel is no longer a significant driver for the town center location.
6. The most recent PKA survey yielded a desire for an even greater mix of uses, more pedestrian-friendly streets, signals at busy intersections and additional off-site parking.



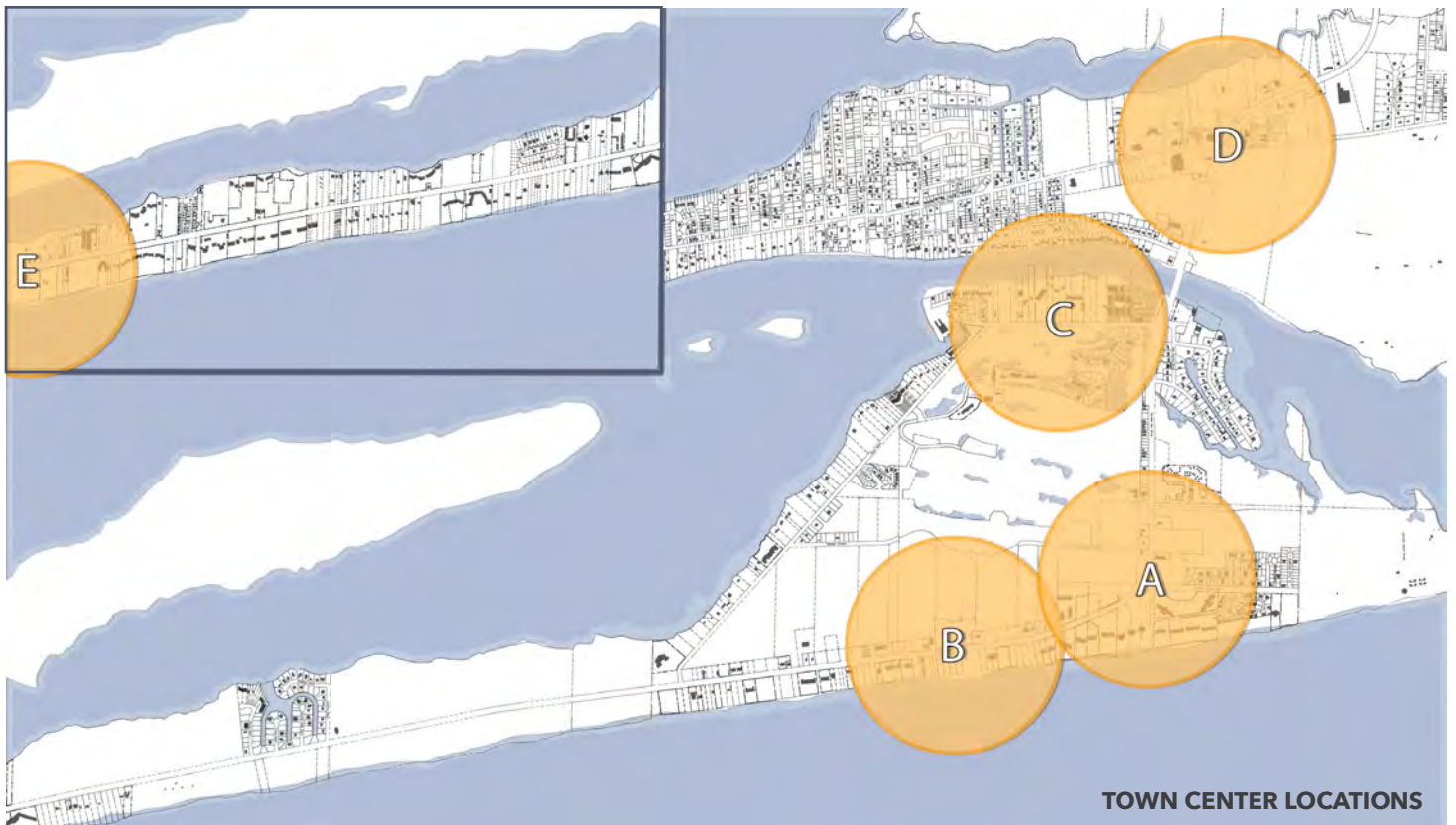
TECHNICAL EVALUATION MATRIX

MASTER PLAN

Instead of focusing exclusively on one general site-specific location for the designated town center as in the 2012 charrette, multiple sites were explored and designed as possible town center locations during this charrette. One of the principal drivers behind this shift was due to the fact that the town center will likely be developed on private property, hence requiring the willing participation of that property owner to turn that vision into reality. Therefore, the design team wanted to provide Escambia County with many options to increase the likelihood of a town center actually being built.

After selecting the most likely sites, the design team illustrated the various design options that could accommodate the +80,000 square feet of commercial uses the market study recommended. In order to objectively assess the technical strengths and weaknesses of each proposal, the plan options were evaluated by the design team in five separate categories. These were:

1. Environmental Considerations
2. Transportation Considerations
3. Infrastructure Considerations
4. Urban Design Considerations
5. Retail Viability Considerations



The design team focused on five pedestrian sheds for potential locations of town and neighborhood centers.

- **Site A:** Generally, at the intersection of Johnson Road with Perdido Key Drive as it curves up north;
- **Site B:** Generally, along the north side of Perdido Key Drive at the southern end of WCI properties and where the Cocina Village used to exist;
- **Site C:** On the north side of River Road, facing the intracoastal waterway;
- **Site D:** At Innerarity Heights; and
- **Site E:** At and around Flora-Bama.

The following pages illustrate the proposed build-out of each town or neighborhood center. The implications of each are noted and include:

- The total proposed retail square footage;
- The total proposed residential program, if applicable;
- The number of impacted lots with the firm intention of trying to minimize the number of property owners that need to collaborate to bring the master plan to fruition;
- The number of buildings requiring demolition or relocation, if applicable;
- The total acres of impacted wetlands; if applicable;
- The total acres of impacted critical habitat, if applicable; and
- The total infrastructure cost estimate for each option.

TOWN CENTER LOCATION 'A'

MASTER PLAN

TRIANGLE



(above): This illustration depicts the town center square at the curve of Perdido Key Drive tying into Sandy Key Drive, and ultimately into an enhanced public beach access to the south. The square's triangular configuration is a result of the street geometries organized around it, and it helps regulate the flow of traffic at that intersection while controlling vehicular speed.

(next page): The 'Triangle' design uses a formal triangular designed square to slow down traffic moving along Perdido Key Drive, in a less abrupt way. This layout includes two retail buildings which anchor the south side of the square, thereby providing a dramatic terminated view from both ends of Perdido Key Drive, whether heading south or east. These retail buildings also effectively shield the square from Perdido Key Drive, providing for intimate-scaled retail streets along the two sides of the square. A retail anchor building is placed at the north-east part of the plan with ample parking located behind.

This master plan's layout does not rely on the Beach Colony properties needing to modify their site plan to shield their parking lots with liner buildings. Additionally, it relies on few property owners needing to coordinate redevelopment efforts to make this design a viable option.

Building Program:

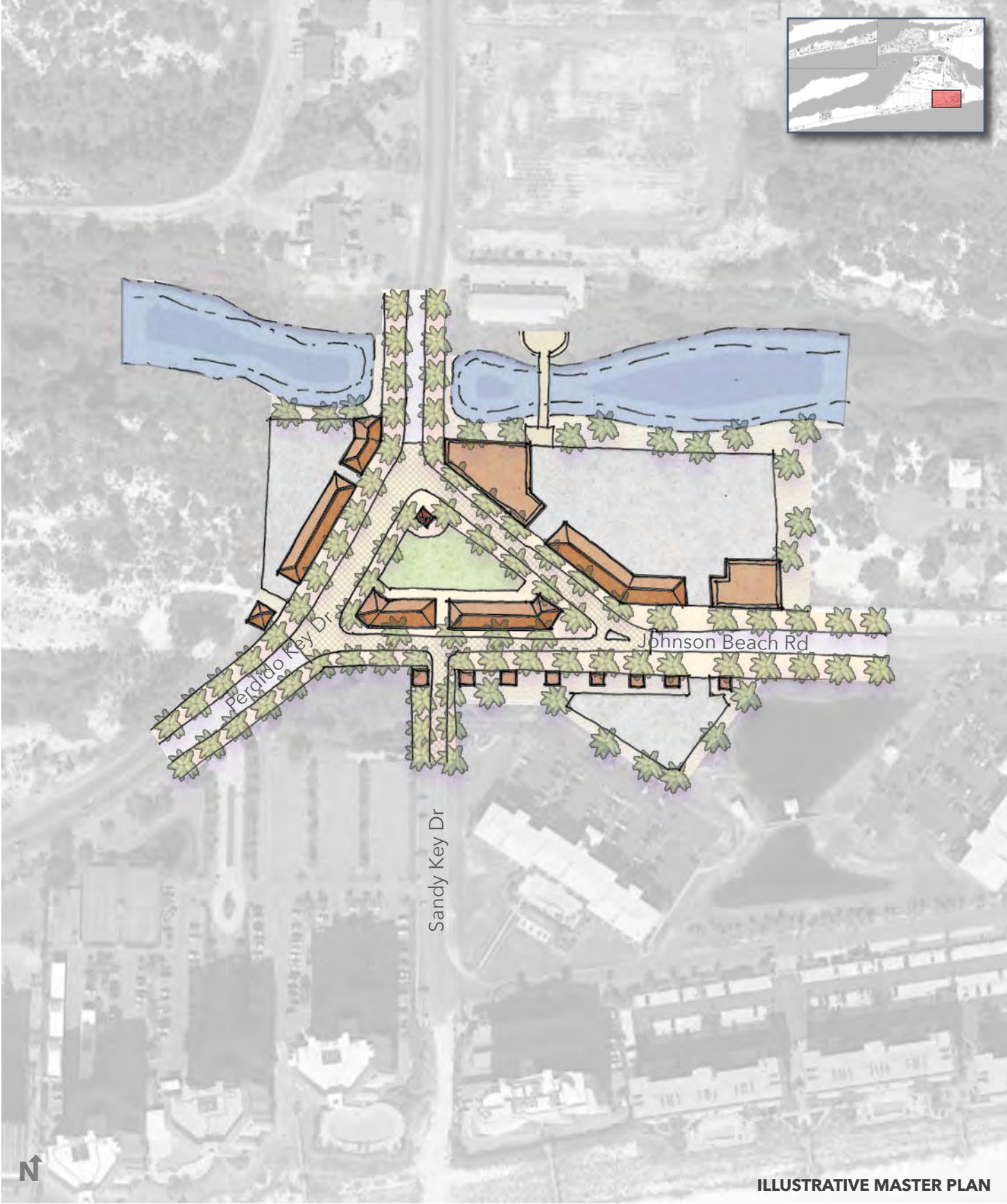
Retail:	51,800 s.f.
Residential units:	20
Impacted Lots:	3
Demolished Buildings:	1

Environmental Impacts:

Wetlands:	.64 acres
Critical Habitat:	2.24 acres

INFRASTRUCTURE COSTS (X \$1,000)			
	Minimum	Average	Maximum
Streets	\$100.95	\$146.80	\$192.66
Asphalt	\$25.0	\$50.85	\$76.71
Concrete	\$82.39	\$122.63	\$162.88
Sanitary Sewer	\$54.06	\$79.48	\$104.90
Water	\$41.67	\$79.55	\$117.43
Gas	\$31.25	\$59.66	\$88.07
Stormwater	\$162.19	\$229.53	\$296.88
Total	\$497.50	\$768.51	\$1,039.52

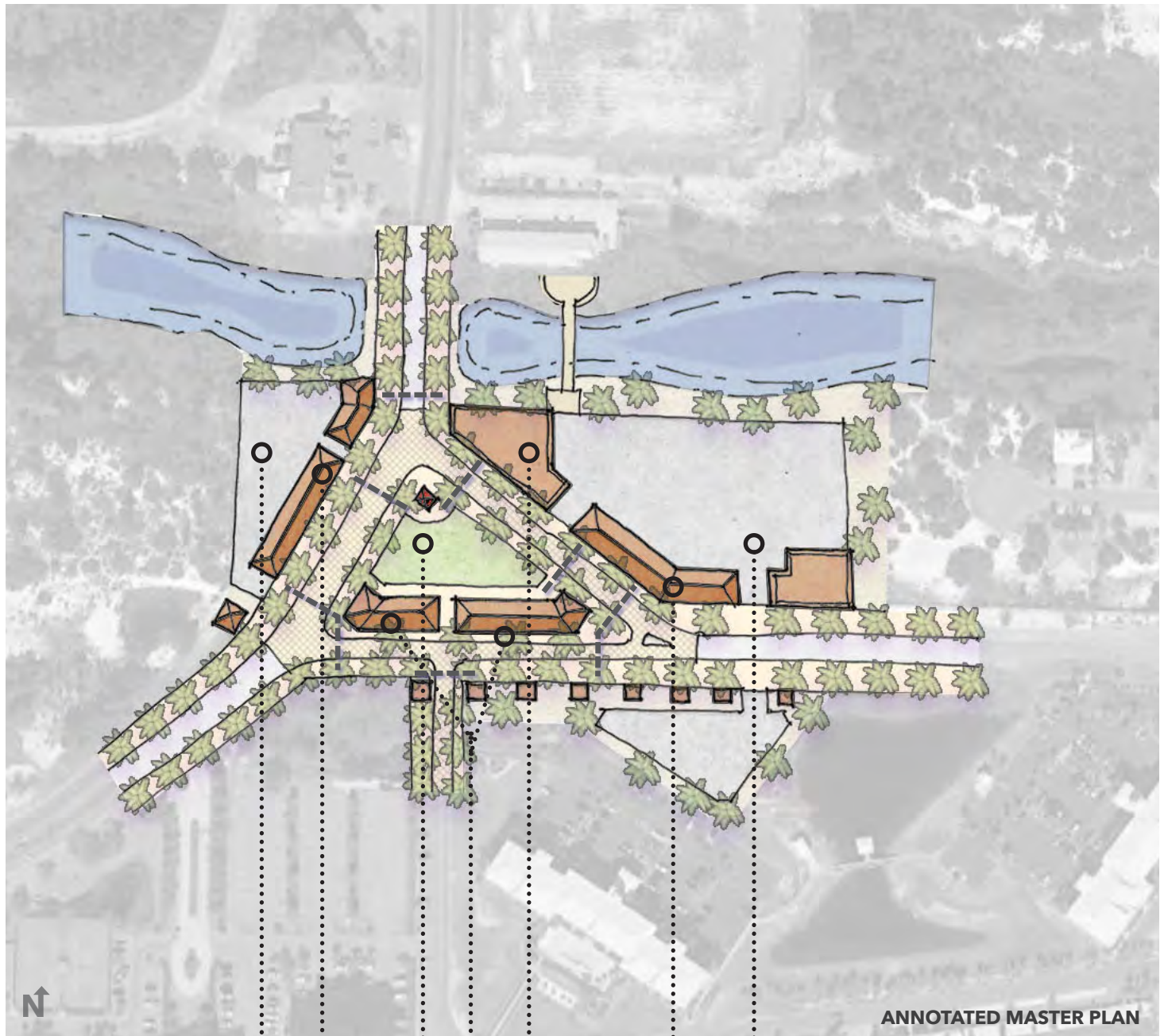
TOWN CENTER LOCATION 'A'
MASTER PLAN



ILLUSTRATIVE MASTER PLAN

TOWN CENTER LOCATION 'A'

MASTER PLAN

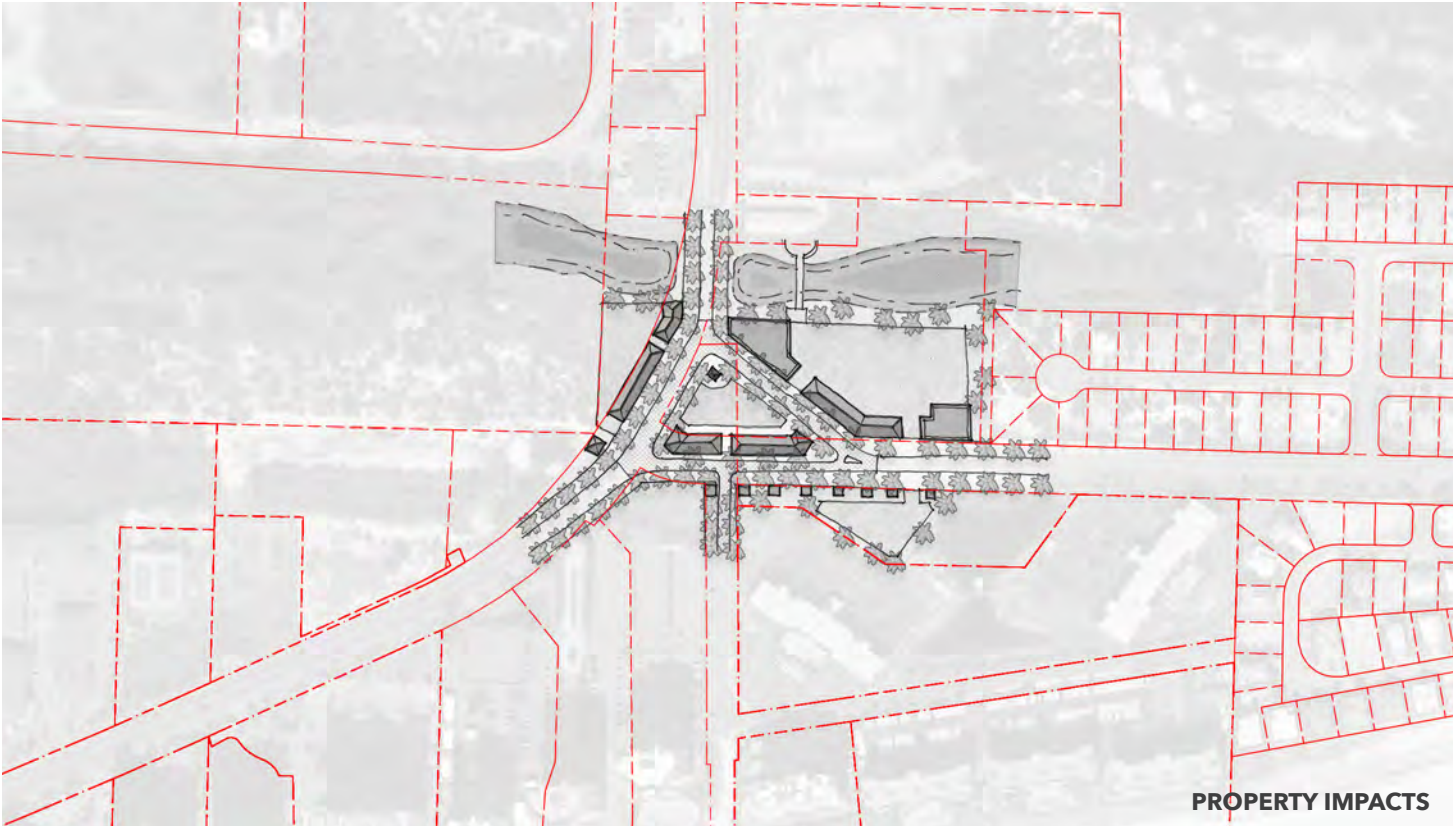
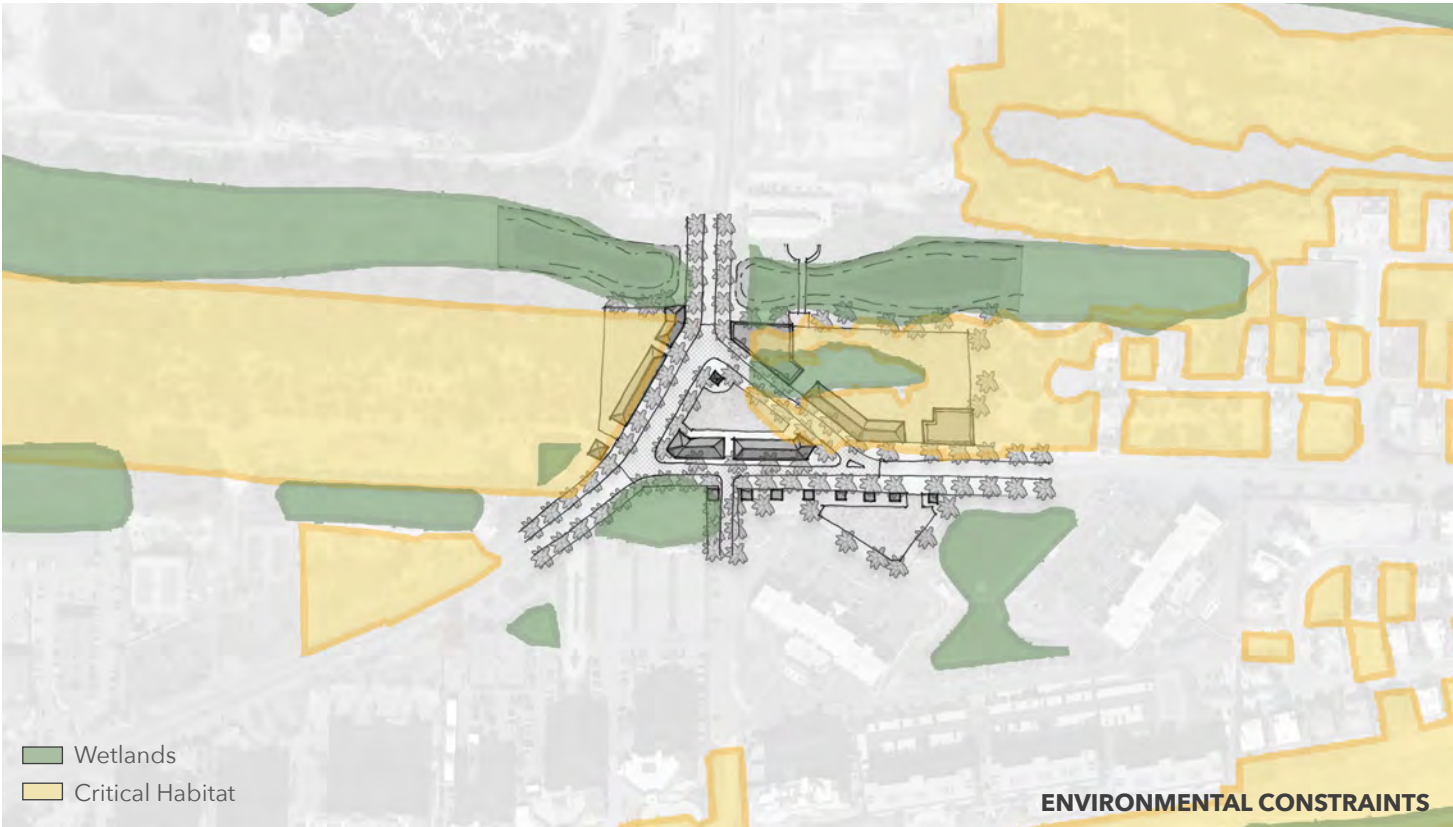


ANNOTATED MASTER PLAN

— Suggested crosswalk locations

- Parking
- Mixed-Use Buildings
- Triangular Square
- Mixed-Use Buildings
- Retail Anchor
- Mixed-Use Buildings
- Parking

TOWN CENTER LOCATION 'A'
MASTER PLAN



TOWN CENTER LOCATION 'A'

MASTER PLAN

SQUARE-A-ABOUT



(above): This illustration depicts a different square configuration for the main public open space at the town center. It is also located at the curve of Perdido Key Drive tying into Sandy Key Drive, and ultimately to the enhanced public beach access to the south.

(next page top - Low Impact): The square-a-bout design uses a formal square designed exclusively along one side of Perdido Key Drive. Its formal shape helps provide increased visibility to the retail center with immediate and increased frontage along it. Liner buildings are proposed on the Beach Colony properties which also successfully shield a parking structure proposed to alleviate their current parking shortages. Small shop pavilions or kiosks line the square's edges to further define its form and also provide an affordable incubator-retail building for entrepreneurial people who want to start inexpensively and small-scaled.

(next page bottom - High Impact): This design envisions additional development of the Sandy Key Condos site at a later date, taking advantage of the site's proximity to the town center. It provides residents with formal open spaces and liner buildings on a pedestrian path along the northern property boundary. It is anchored by a boutique hotel.

LOW IMPACT PLAN

Building Program:

Retail:	76,800 s.f.
Residential units:	50
Impacted Lots:	7
Demolished Buildings:	1

Environmental Impacts:

Wetlands:	1.94 acres
Critical Habitat:	2.15 acres

HIGH IMPACT PLAN

Building Program:

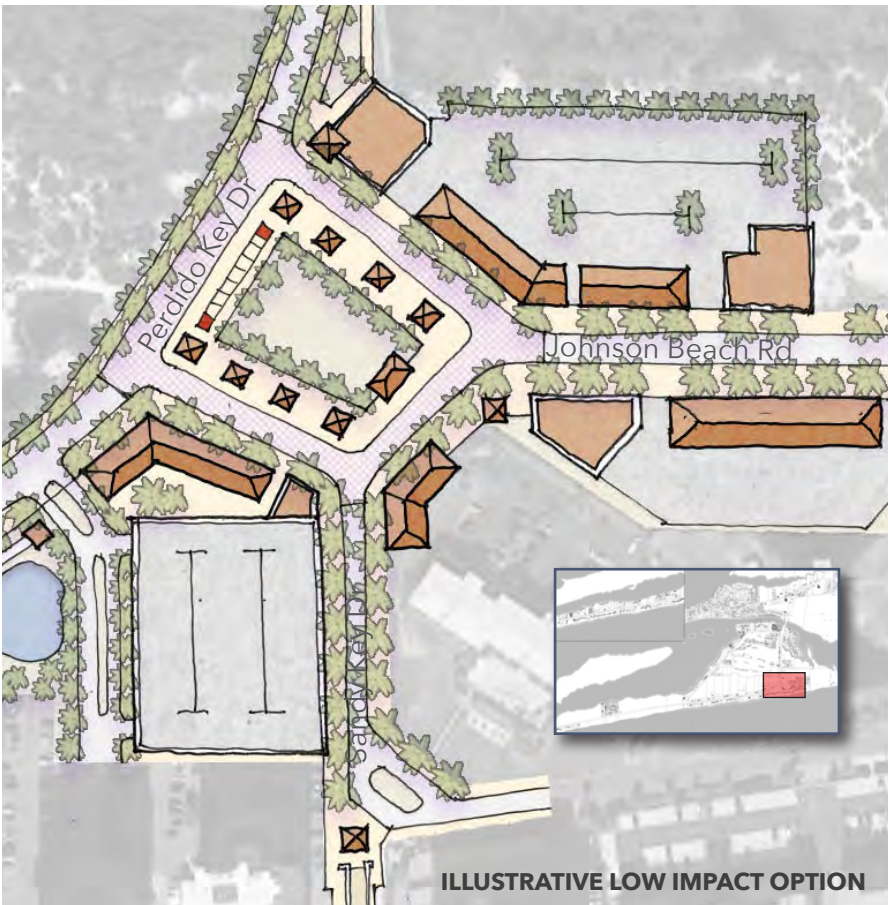
Retail:	84,800 s.f.
Hotel:	80 rooms
Residential units:	50
Impacted Lots:	7
Demolished Buildings:	1

Environmental Impacts:

Wetlands:	1.94 acres
Critical Habitat:	2.15 acres

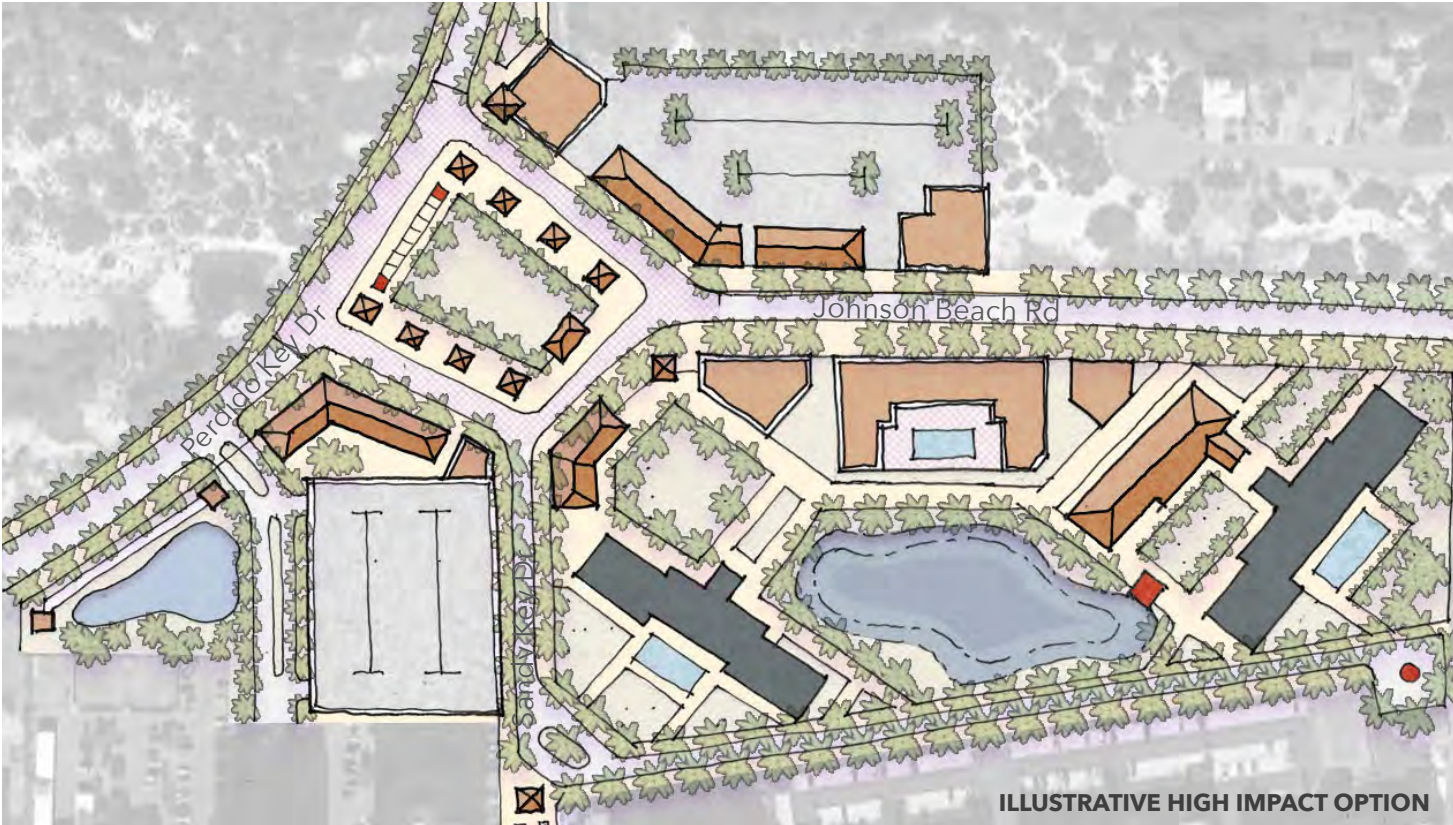
TOWN CENTER LOCATION 'A'

MASTER PLAN



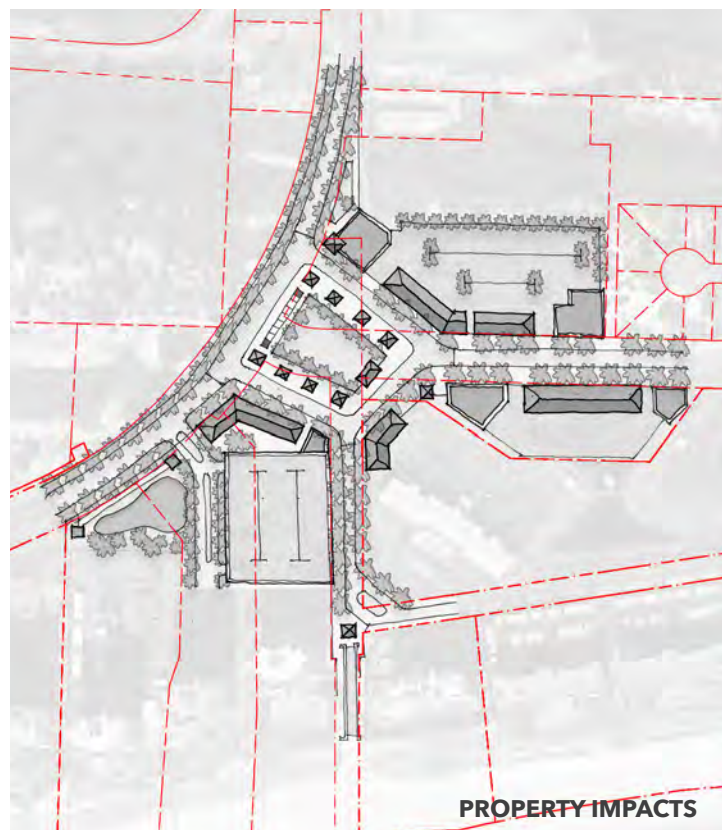
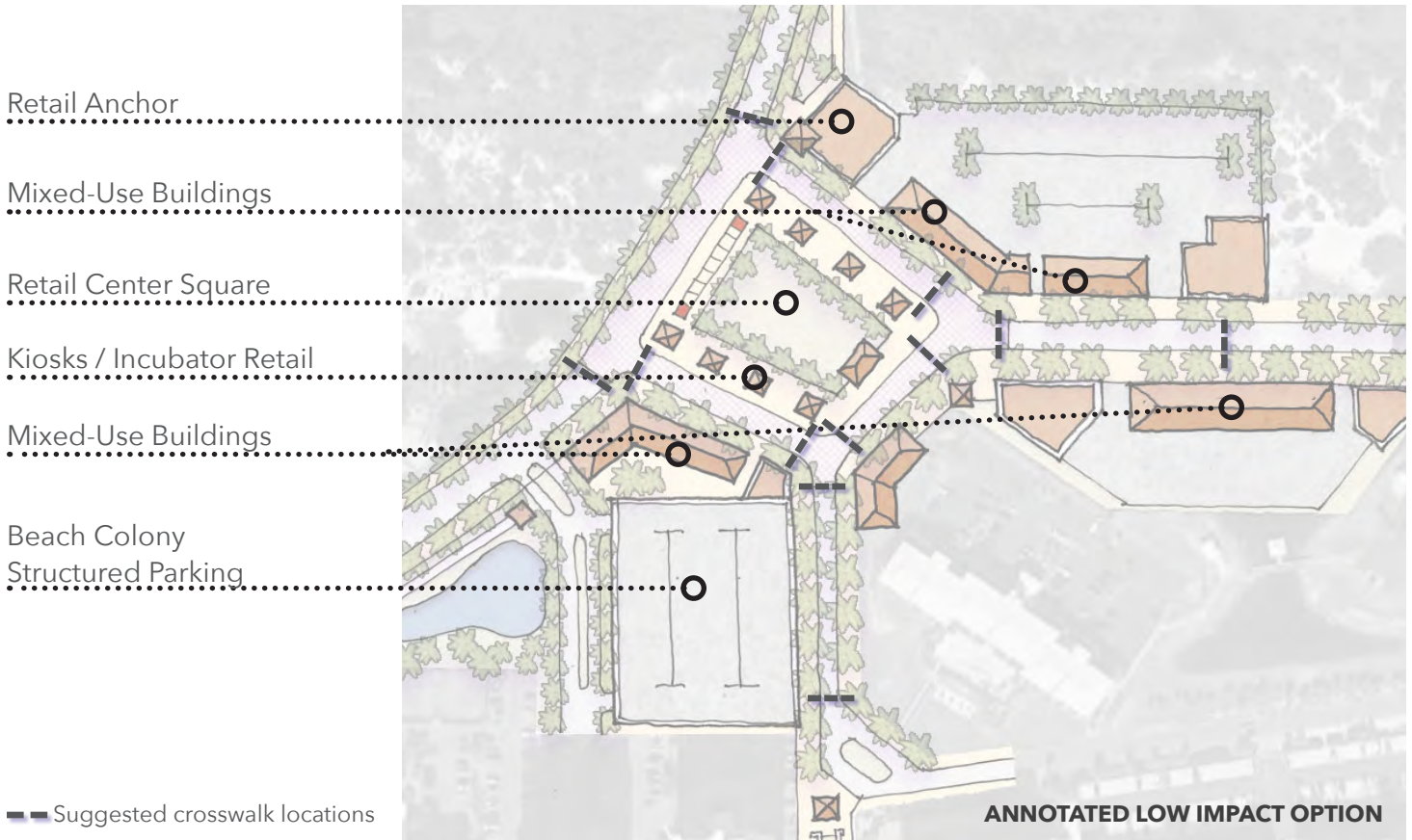
INFRASTRUCTURE COSTS (X \$1,000) LOW IMPACT			
	Minimum	Average	Maximum
Streets	\$51.4	\$74.8	\$98.2
Asphalt	\$12.7	\$25.9	\$39.1
Concrete	\$42.0	\$62.5	\$83.0
Sanitary Sewer	\$28.7	\$42.0	\$55.3
Water	\$21.2	\$40.5	\$59.8
Gas	\$15.9	\$30.4	\$44.9
Stormwater	\$99.4	\$139.4	\$179.7
Total	\$271.47	\$415.73	\$559.99

INFRASTRUCTURE COSTS (X \$1,000) HIGH IMPACT			
	Minimum	Average	Maximum
Streets	\$71.4	\$103.9	\$136.3
Asphalt	\$17.7	\$36.0	\$54.3
Concrete	\$58.3	\$86.6	\$115.2
Sanitary Sewer	\$42.9	\$62.2	\$81.6
Water	\$29.5	\$56.3	\$83.1
Gas	\$22.1	\$42.2	\$62.3
Stormwater	\$154.4	\$219.4	\$284.7
Total	\$396.33	\$606.90	\$817.46

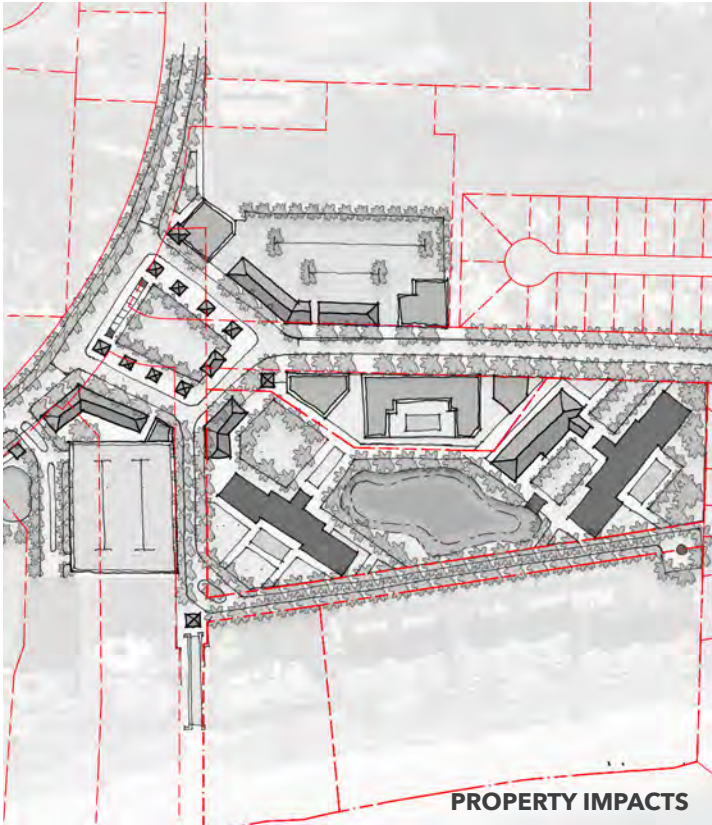
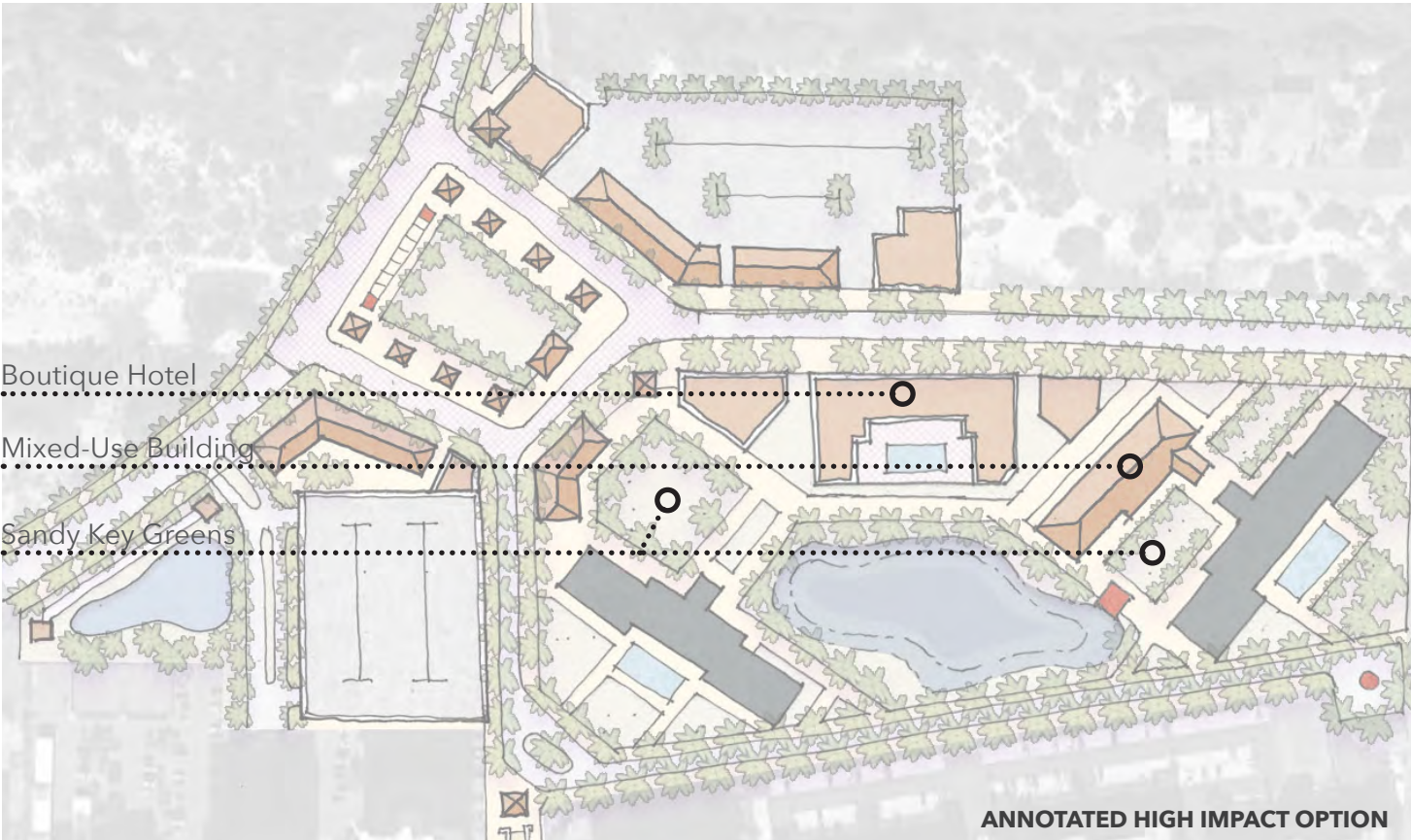


TOWN CENTER LOCATION 'A'

MASTER PLAN



TOWN CENTER LOCATION 'A'
MASTER PLAN



TOWN CENTER LOCATION 'A'

MASTER PLAN

OVAL WEST



(above): This illustration depicts the town center green on the north-west of the curve of Perdido Key Drive. The green would stay in its natural, undisturbed form in order to avoid the wetlands within it. Retail building that anchor both the east and west sides of the green are strategically placed to not impact the wetlands either.

(next page): The 'Oval West' design does not physically interrupt Perdido Key Drive but visually frames the view by enclosing both sides of the Drive along the length of the town center green. A group of small garage or retail incubator buildings are suggested along the northern edge of the Beach Colony property to shield the large surface parking lots. This design is intended to integrate the town center with the existing Villagio retail center to build on its presence and give a more dignified face to Perdido Key Drive. The tennis courts and parking lot serving the residents on the south side of Perdido Key Drive have been relocated, with the parking provided in a new structured parking garage, framed by new commercial buildings, and the tennis courts provided at the north-west corner of the green, also shielded behind a new residential or commercial building. The north side of the green is lined with narrow buildings that could be used for a variety of uses, including residential.

Building Program:

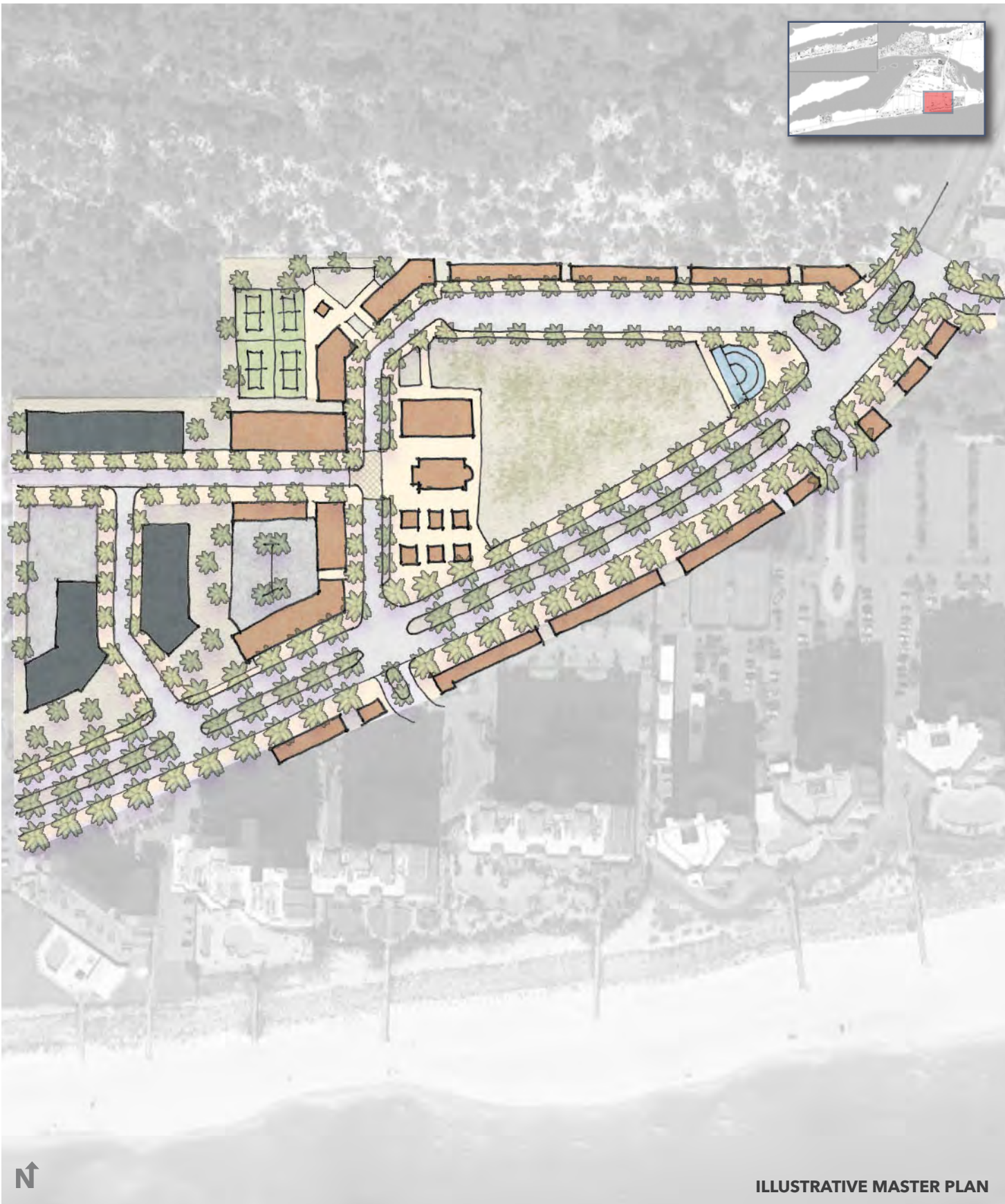
Retail:	73,550 s.f.
Residential units:	30
Impacted Lots:	5
Demolished Buildings:	0

Environmental Impacts:

Wetlands:	.18 acres
Critical Habitat:	3.79 acres

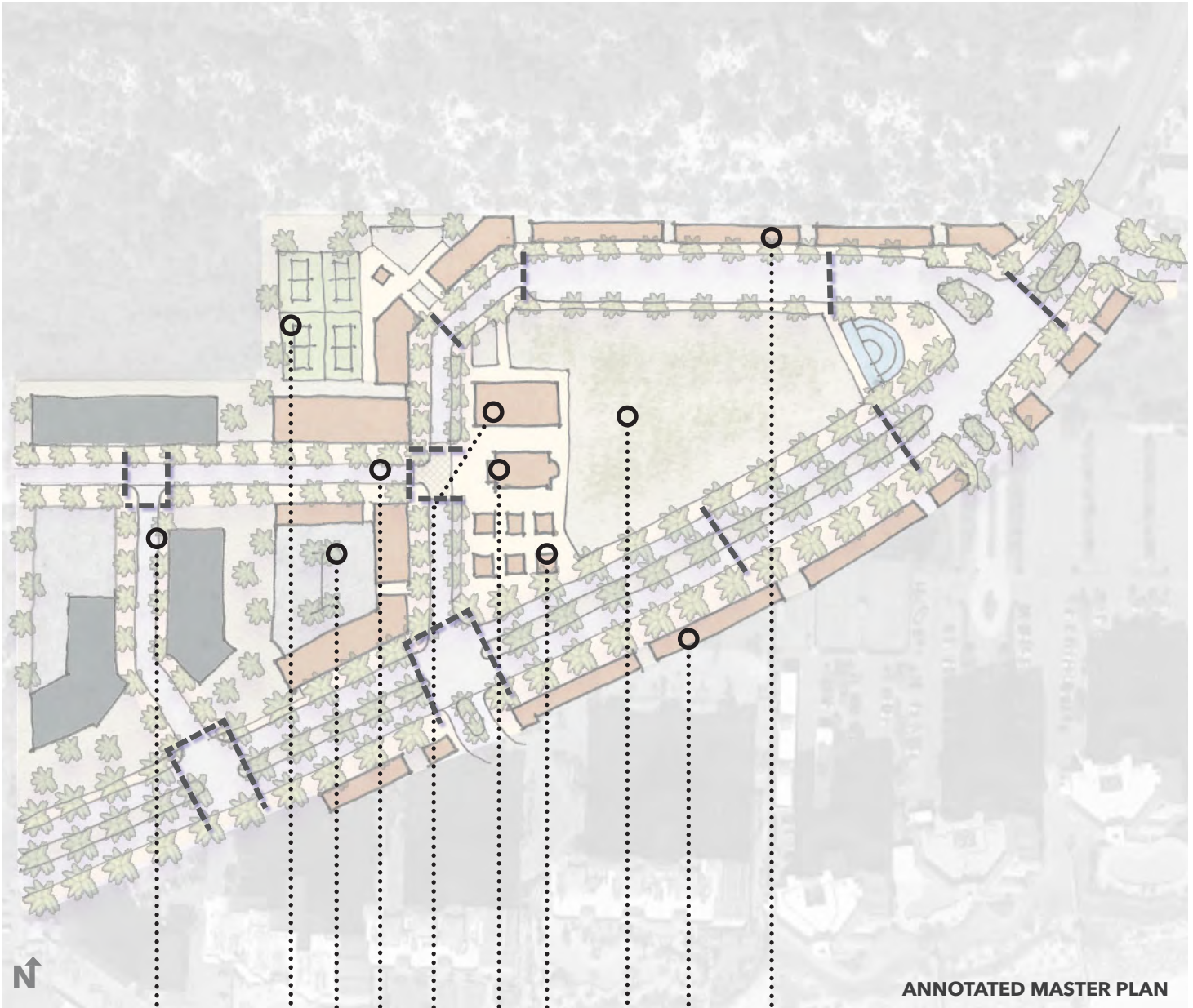
INFRASTRUCTURE COSTS (X \$1,000)			
	Minimum	Average	Maximum
Streets	\$184.7	\$268.6	\$352.5
Asphalt	\$45.7	\$93.0	\$140.3
Concrete	\$150.7	\$224.4	\$298.0
Sanitary Sewer	\$77.6	\$118.0	\$158.3
Water	\$76.2	\$145.5	\$214.8
Gas	\$57.2	\$109.1	\$161.1
Stormwater	\$183.2	\$257.2	\$331.3
Total	\$775.34	\$1,215.85	\$1,656.36

TOWN CENTER LOCATION 'A'
MASTER PLAN



TOWN CENTER LOCATION 'A'

MASTER PLAN



ANNOTATED MASTER PLAN

— Suggested crosswalk locations

Existing Villagio

Re-located Tennis Courts

Mixed-use with Structured Parking

Proposed Street to Villagio

Retail Anchor

Civic Building

Kiosks / Incubator Retail

Triangular Square / Wetlands

Garages / Incubator Liners

Retail Liners

TOWN CENTER LOCATION 'A'
MASTER PLAN



TOWN CENTER LOCATION 'A'

MASTER PLAN

VILLAGE CENTER



(above): This illustration depicts a town center plan on lots principally owned by one property owner, which extends the full length of Johnson Beach Road. Because the area is so much larger than the other properties, and fully controlled by one entity, there was an opportunity to develop a more ambitious program which includes a hotel of 300+ rooms anchoring one side of the town square, and a mix of mixed-use and residential buildings flank the other three sides of the square. In this option, the square is wholly internalized, yet still visible from Perdido Key Drive.

(next page): The 'Village Center' design also does not physically interrupt Perdido Key Drive, instead it opens up a square providing the retail buildings with necessary visibility from Perdido Key Drive. This plan transitions down from retail along Perdido Key Drive to multi-family residential one street over, and then down again to a single-family neighborhood to match the scale of surrounding developments. The density then transitions back up as to four to six-story multi-family buildings overlooking Johnson Beach park to the south and the bay to the north.

Building Program:

Retail:	105,000 s.f.
Hotel:	40,000 s.f. / 300+ rooms
Residential units:	215
Impacted Lots:	9
Demolished Buildings:	3

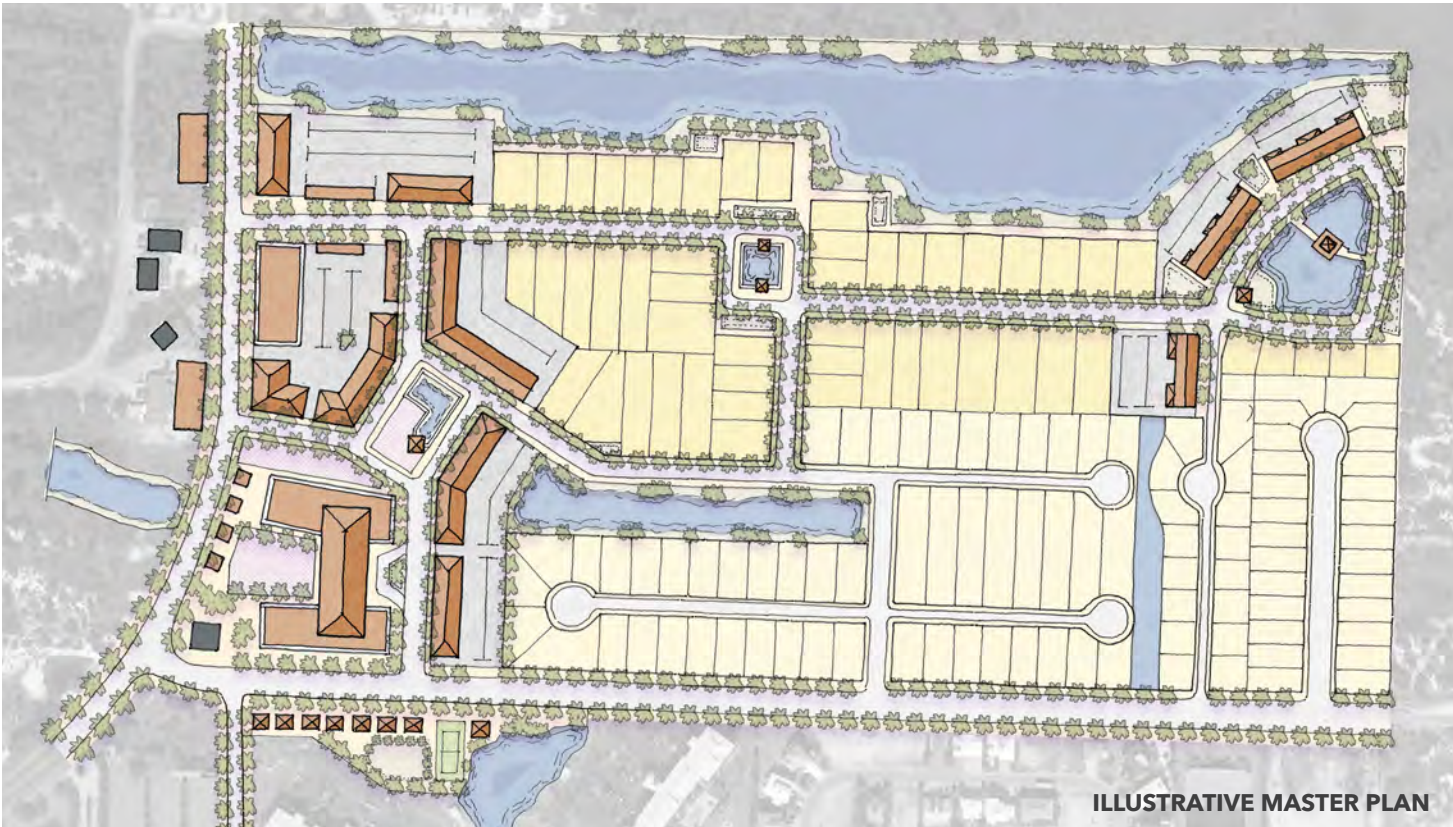
Environmental Impacts:

Wetlands:	7.09 acres
Critical Habitat:	7.58 acres

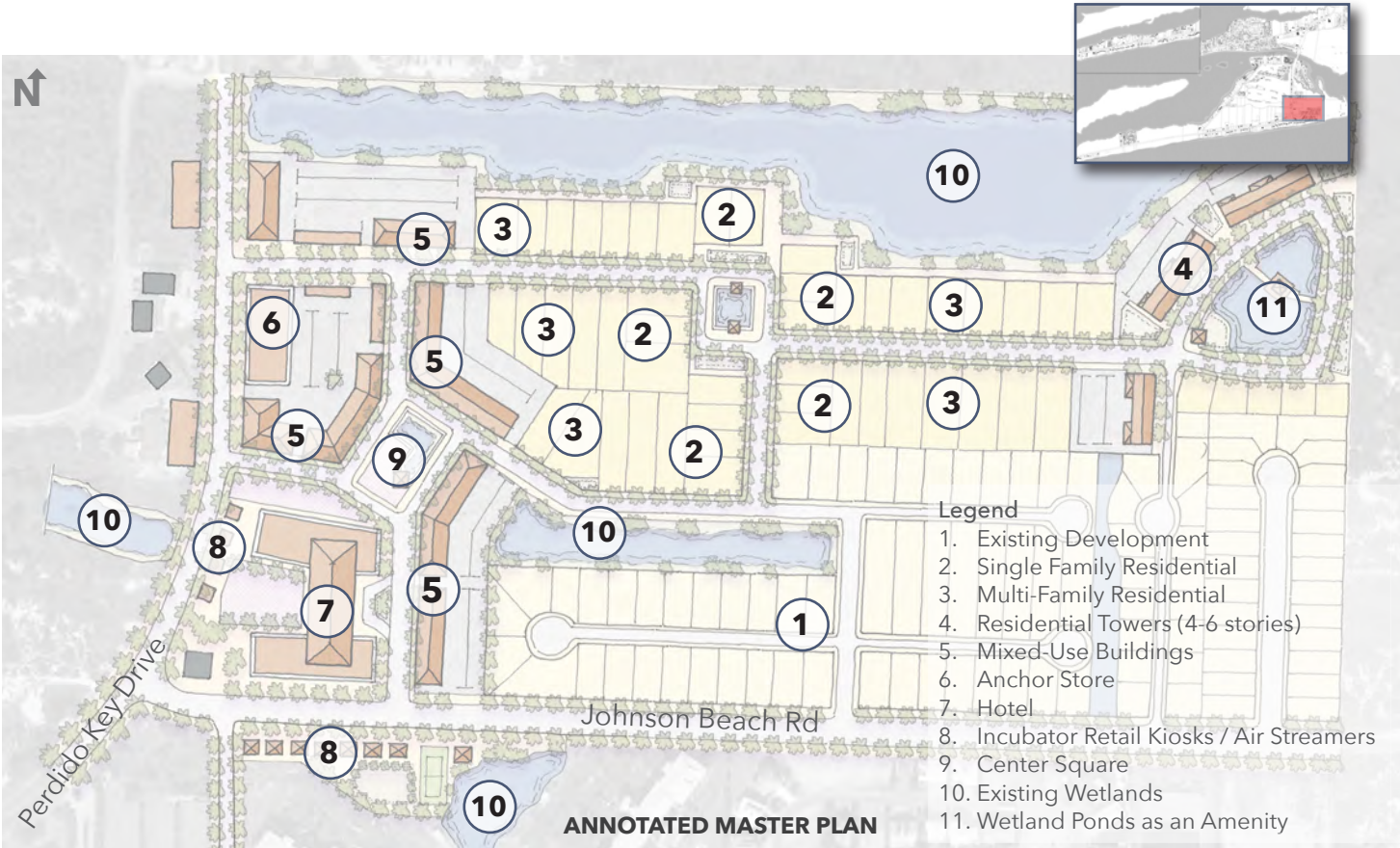
INFRASTRUCTURE COSTS (X \$1,000)			
	Minimum	Average	Maximum
Streets	\$599.0	\$871.1	\$1,143.2
Asphalt	\$148.4	\$301.8	\$455.2
Concrete	\$488.9	\$727.7	\$966.6
Sanitary Sewer	\$328.2	\$481.2	\$634.1
Water	\$247.3	\$472.0	\$696.8
Gas	\$185.4	\$354.0	\$522.6
Stormwater	\$889.7	\$1,278.9	\$1,668.1
Total	\$2,886.87	\$4,486.73	\$6,086.58

TOWN CENTER LOCATION 'A'

MASTER PLAN



ILLUSTRATIVE MASTER PLAN

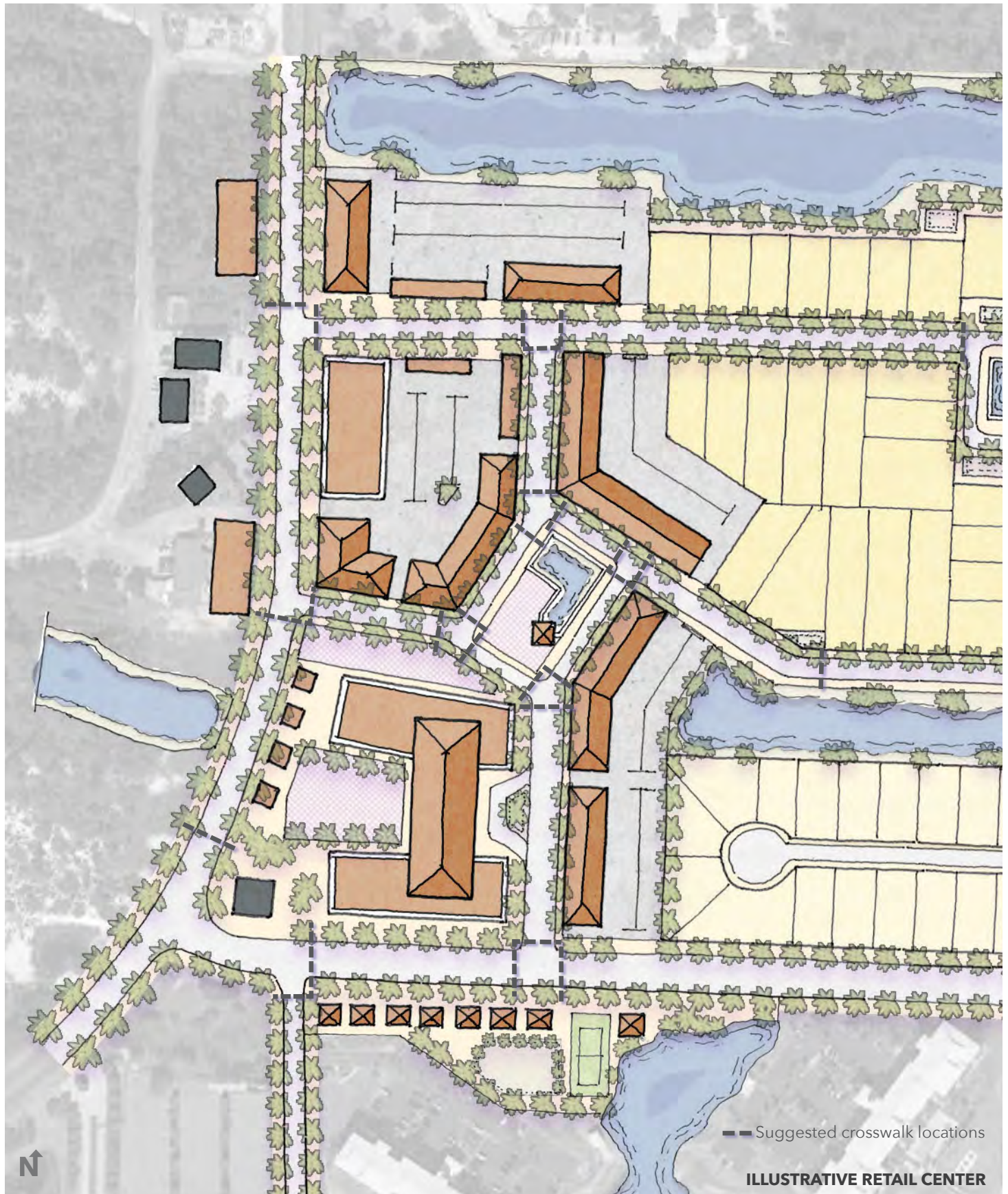


- Legend**
- 1. Existing Development
 - 2. Single Family Residential
 - 3. Multi-Family Residential
 - 4. Residential Towers (4-6 stories)
 - 5. Mixed-Use Buildings
 - 6. Anchor Store
 - 7. Hotel
 - 8. Incubator Retail Kiosks / Air Streamers
 - 9. Center Square
 - 10. Existing Wetlands
 - 11. Wetland Ponds as an Amenity

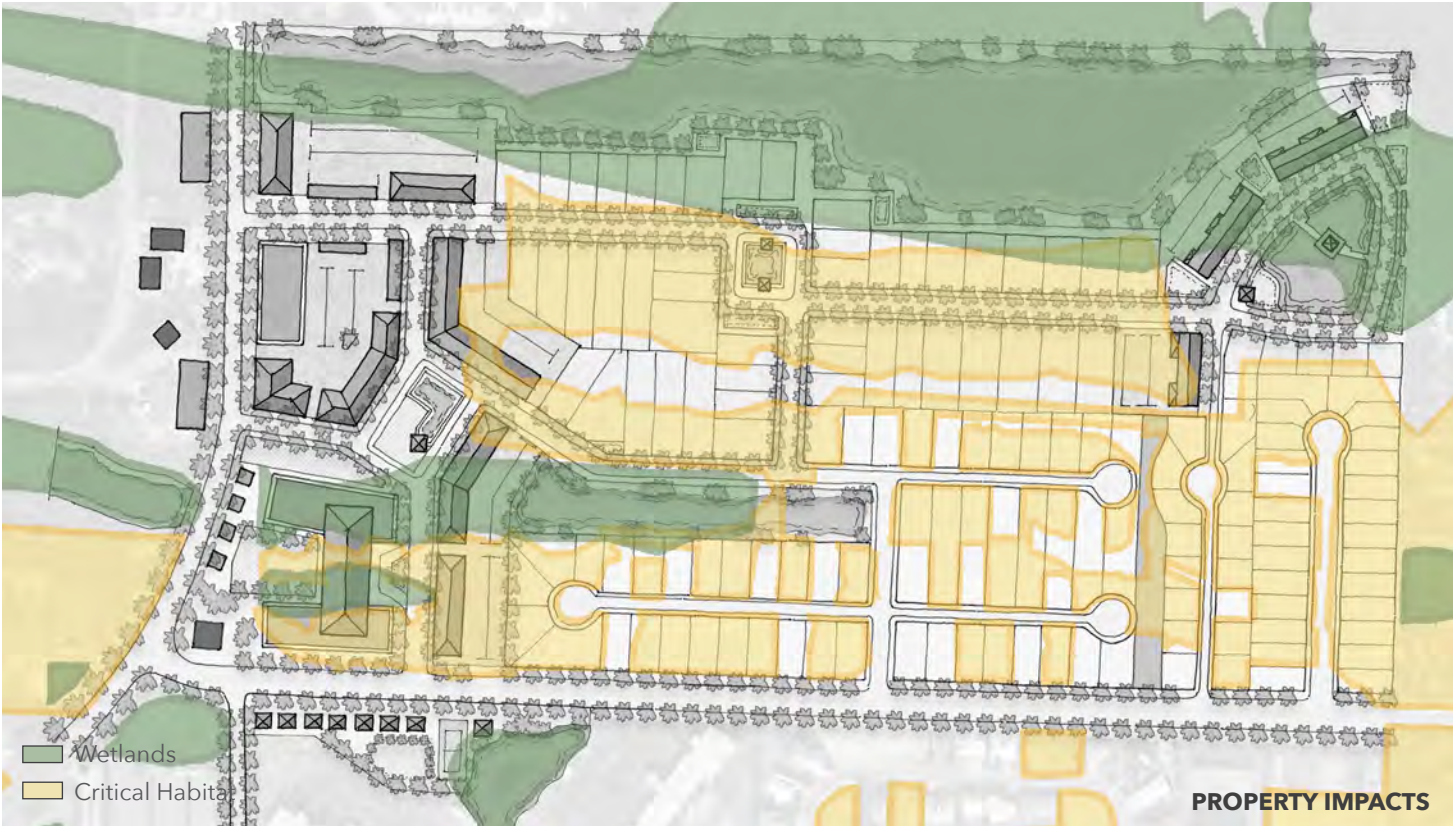
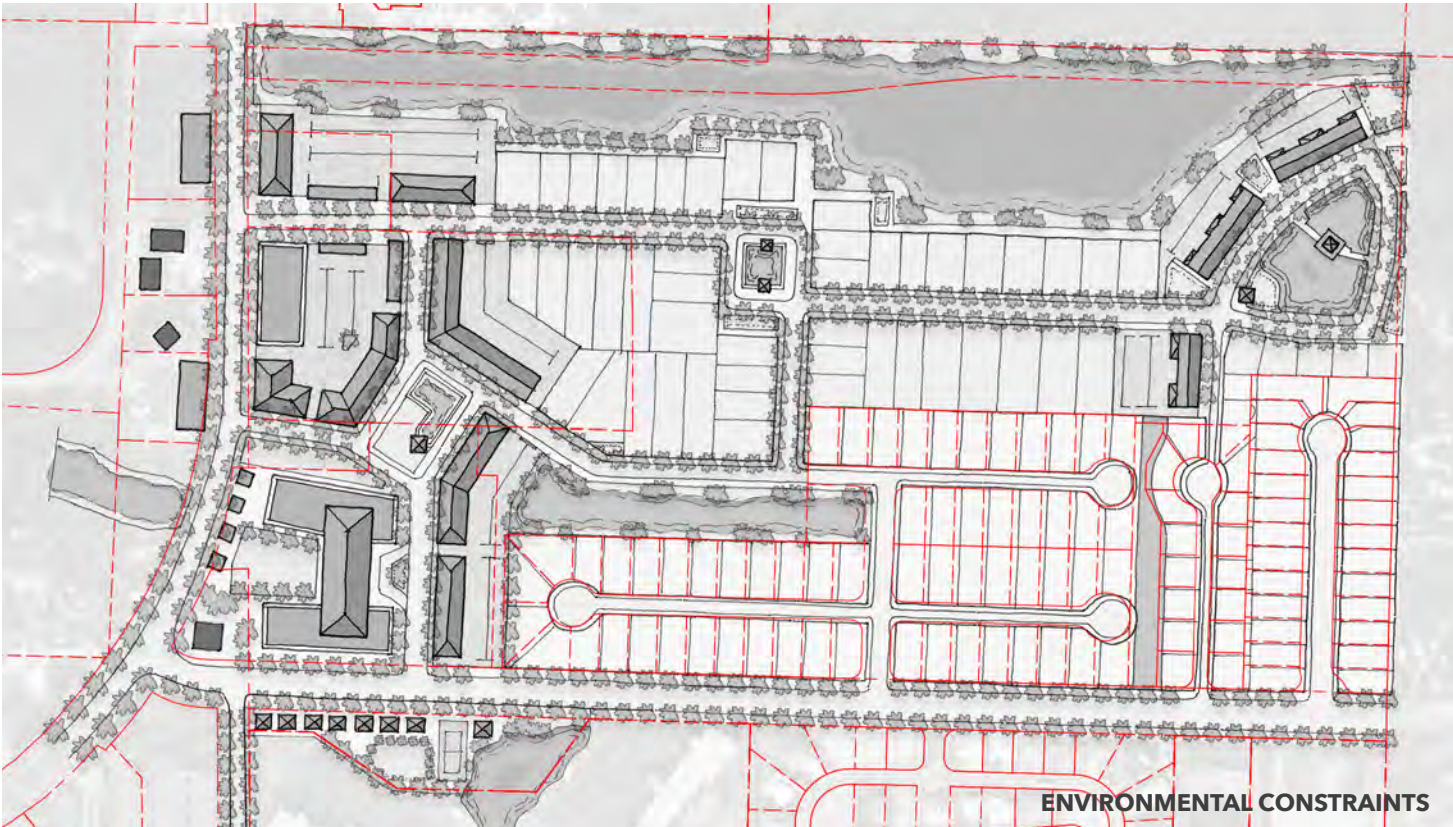
ANNOTATED MASTER PLAN

TOWN CENTER LOCATION 'A'

MASTER PLAN



TOWN CENTER LOCATION 'A'
MASTER PLAN



TOWN CENTER LOCATION 'B'

MASTER PLAN

GRAND VILLAGIO



(above): This illustration illustrates a town center design organized around a triangular-shaped square on the north side of Perdido Key Drive, and flanked by retail building on three sides. It is on property principally owned by only two property owners, with the majority of the area located on WCI's property, across the street from the Mirabella Tower.

(next page): The 'Grand Villagio' design is primarily sited on WCI's property and connects across another landowner's parcel in order to tie into the existing Villagio Center, with the aim to rehabilitate and strengthen their retail presence. This design loosely follows the Lake Forest, Illinois retail model, (one of the first shopping centers in the country) which organizes its retail around a square that is also open on one side to a main thoroughfare. In this design, the main square is anchored on the north by a boutique hotel. A public beach access is proposed directly across the street thereby enhancing this retail center location. The five property owners along Perdido Key Drive, between the Villagio and WCI property would be encouraged to rebuild following this plan, and as the market demands. Parking is hidden behind buildings or landscaped plants.

Building Program:

Retail:	85,000 s.f.
Hotel:	20,000 s.f. / 180+ rooms
Residential units:	30
Impacted Lots:	8
Demolished Buildings:	0

Environmental Impacts:

Wetlands:	1.03 acres
Critical Habitat:	.14 acres

WCI Pre-Permitted Critical Habitat:

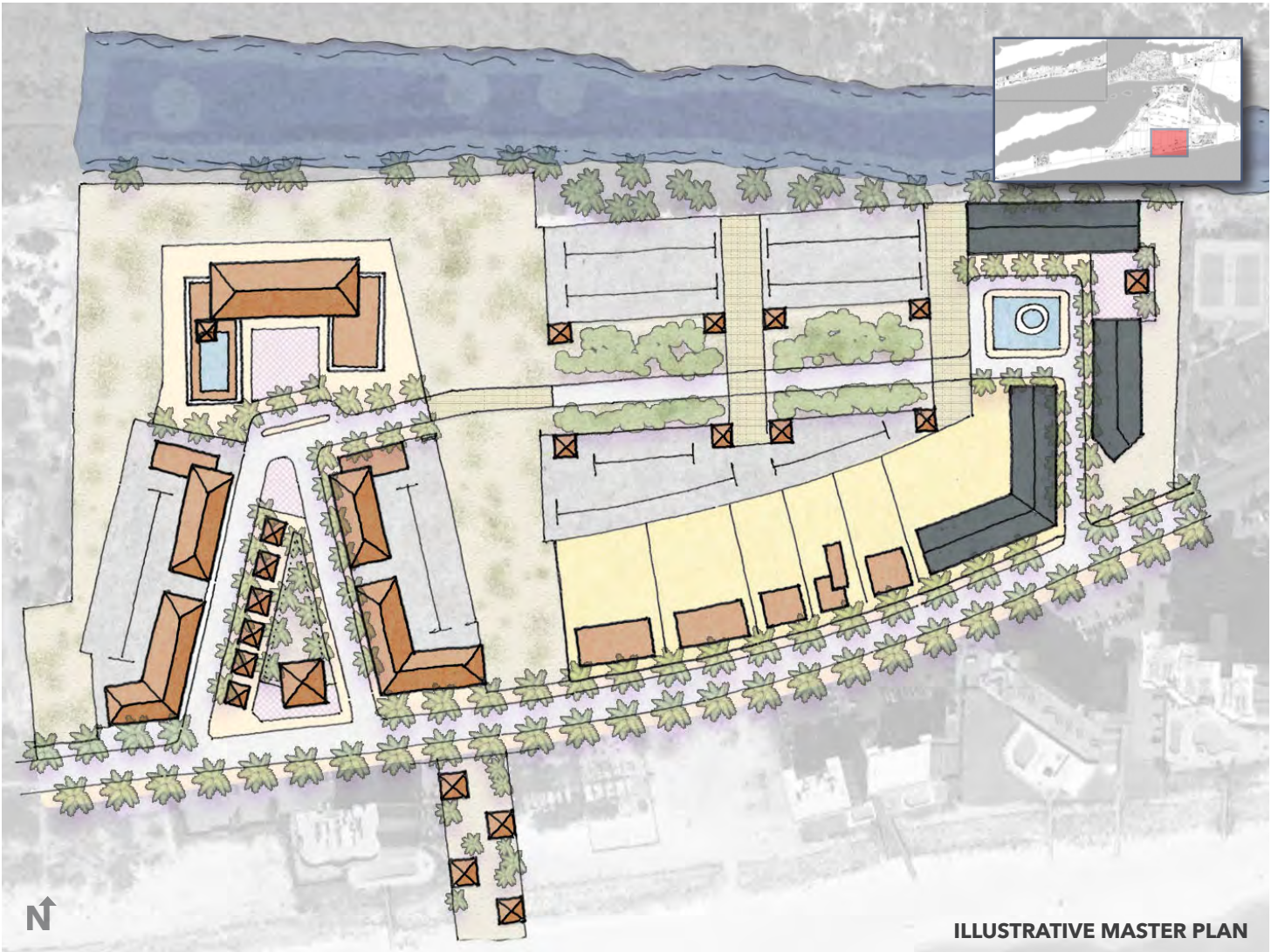
Total:	13.06 acres
Critical Habitat Preserved:	4.86 acres
Critical Habitat Affected:	7.02 acres

Unofficial Critical Habitat:

Critical Habitat Total:	6.31 acres
Critical Habitat Preserved:	1.77 acres
Critical Habitat Affected:	4.54 acres

TOWN CENTER LOCATION 'B'

MASTER PLAN

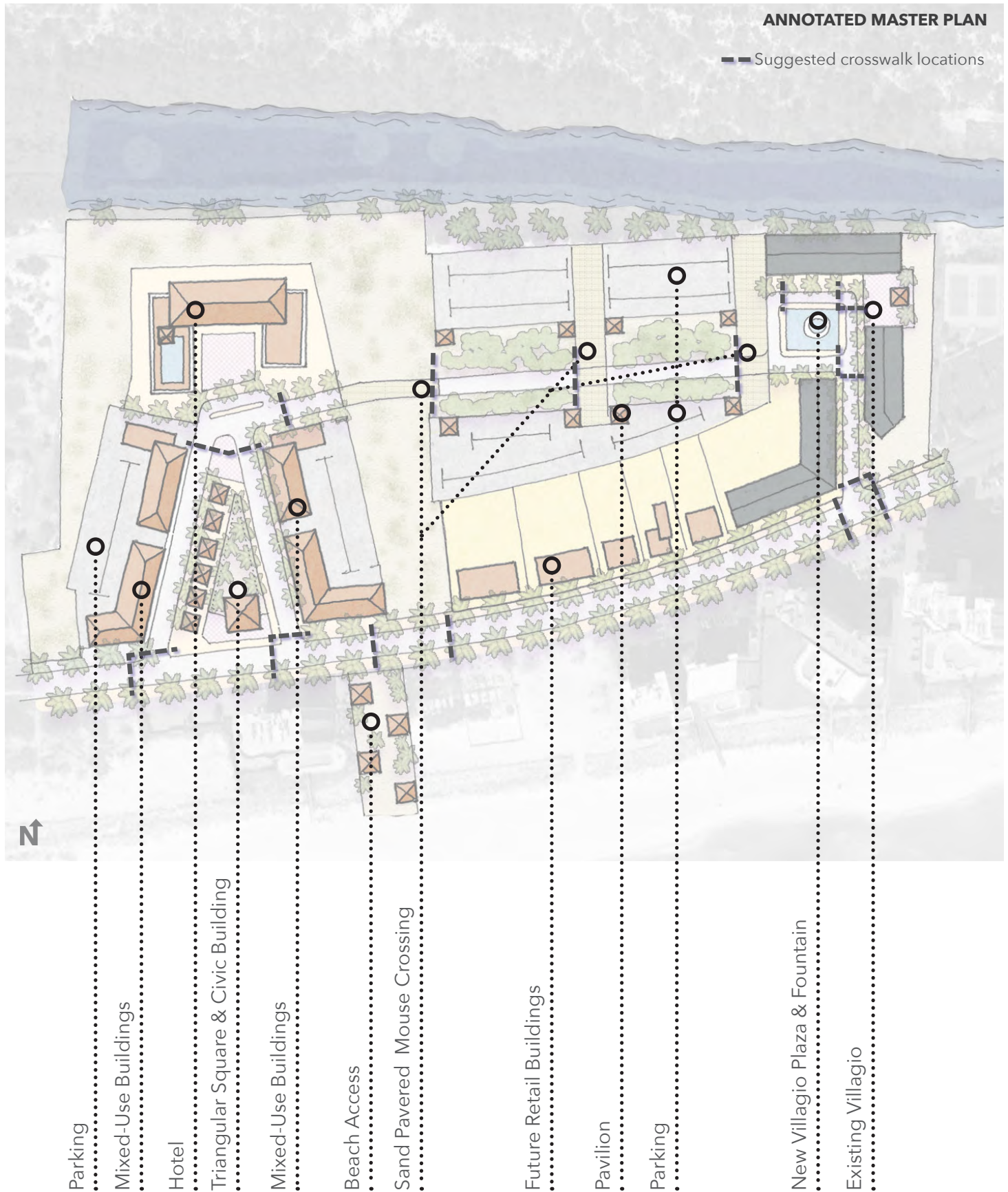


ILLUSTRATIVE MASTER PLAN

INFRASTRUCTURE COSTS (X \$1,000)			
	Minimum	Average	Maximum
Streets	\$167.6	\$243.8	\$319.9
Asphalt	\$41.5	\$84.4	\$127.4
Concrete	\$136.8	\$203.6	\$270.5
Sanitary Sewer	\$81.4	\$121.2	\$160.9
Water	\$69.2	\$132.1	\$195.0
Gas	\$51.9	\$99.1	\$146.2
Stormwater	\$213.5	\$302.3	\$391.2
Total	\$761.86	\$1,186.50	\$1,611.14

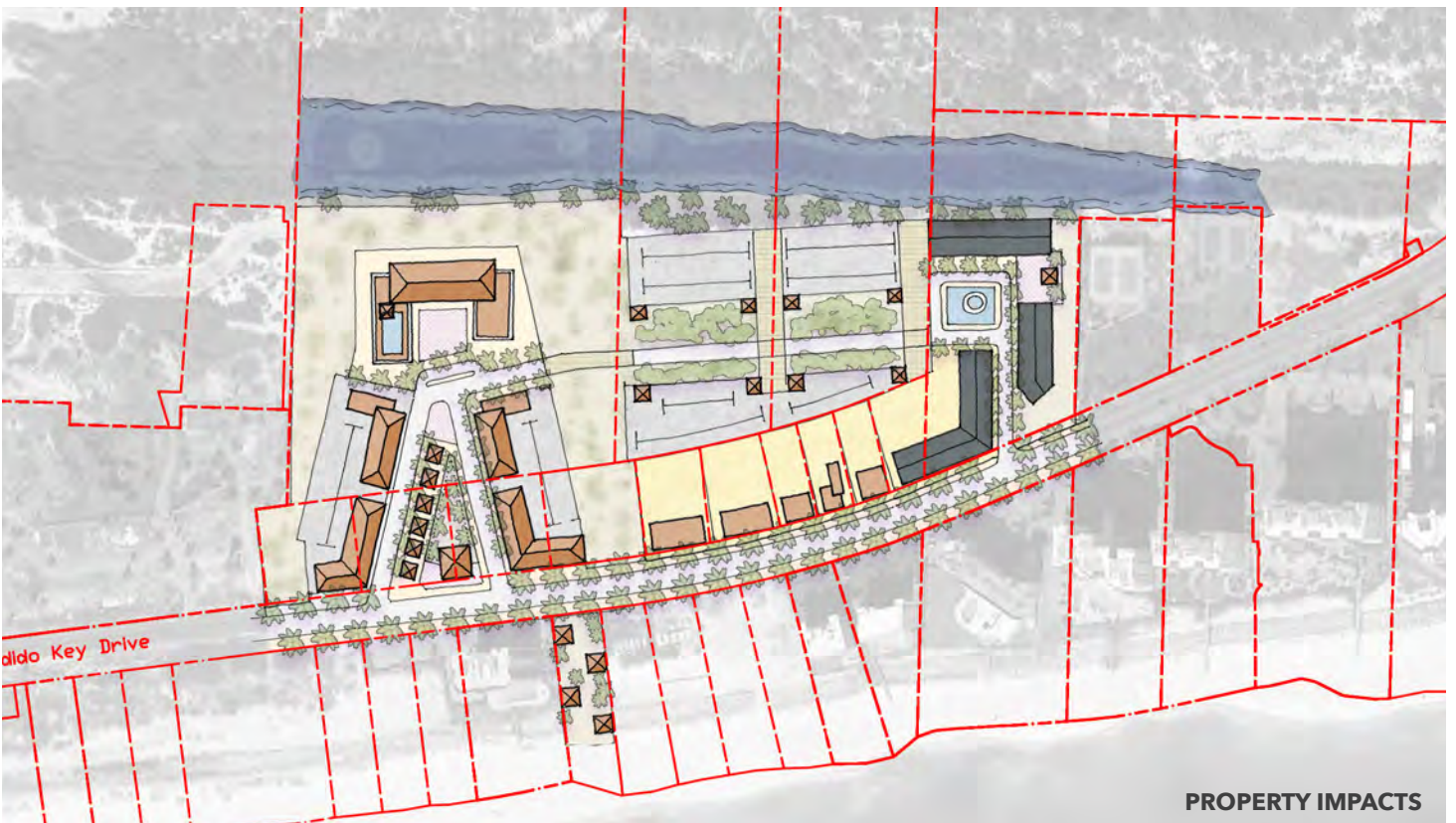
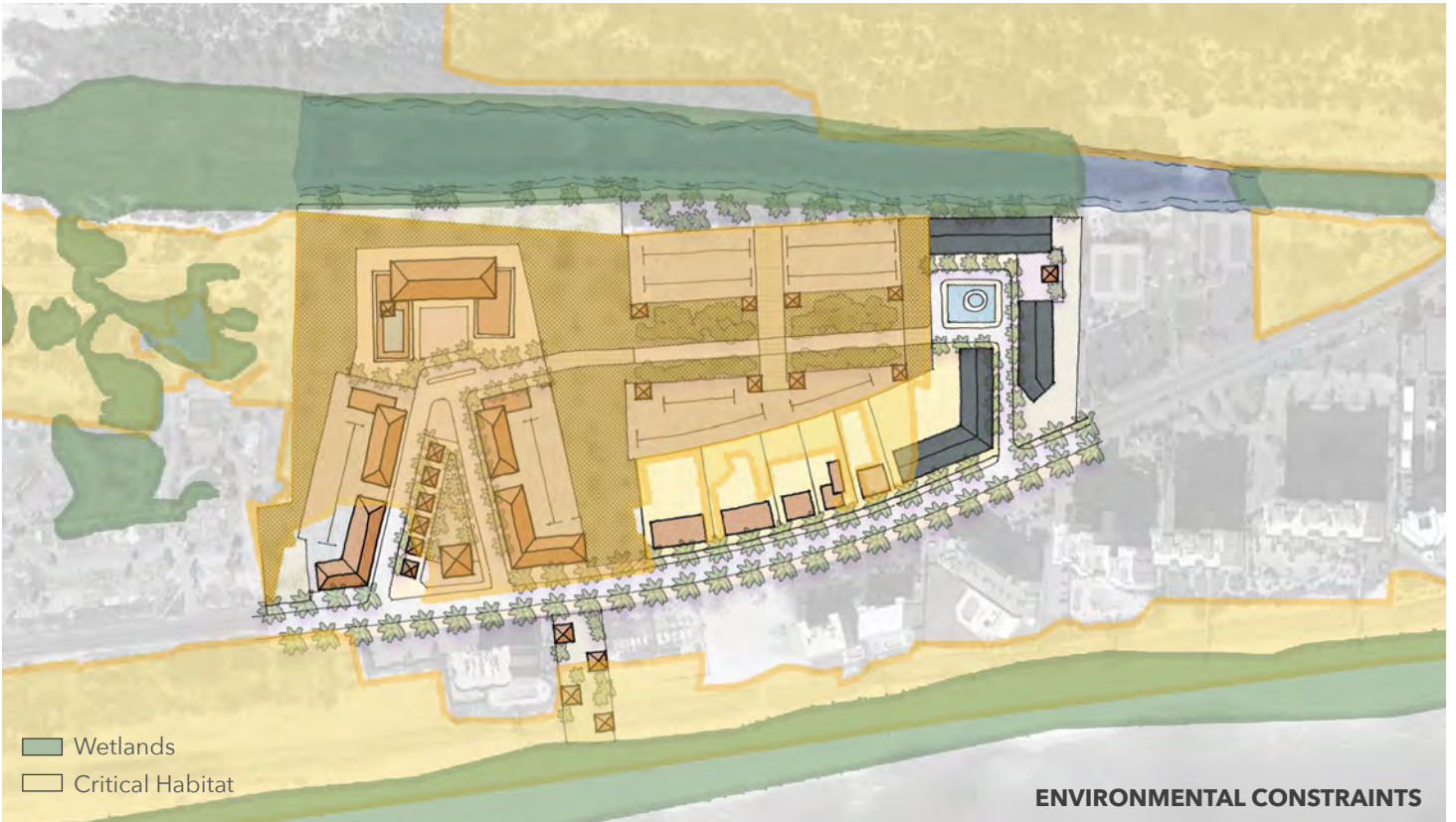
TOWN CENTER LOCATION 'B'

MASTER PLAN



TOWN CENTER LOCATION 'B'

MASTER PLAN



TOWN CENTER LOCATION 'B'

MASTER PLAN

COCINA VILLAGE



(above): This illustration depicts a linear town center, organized around an elongated green parallel to Perdido Key Drive.

(next page): The 'Cocina Village' design is sited on the old Cocina site (destroyed by Hurricane Ivan) and WCI's property. This design is most like a conventional shopping strip, except for the fact that the majority of the parking is located towards the rear of the buildings. Instead, the shops are fronted by a parallel parking along a narrow street. The primary retail is on the Cocina property while the hotel is located on WCI's property with two signature gateway buildings or elements anchoring the green along Perdido Key Drive. Public beach access is also proposed directly across the street from the hotel. Unfortunately, the viability of this plan is hindered by the fact that the 36 fractal owners of the Cocina property must first decide in favor of redeveloping this site along this design concept.

Building Program:

Retail:	85,000 s.f.
Hotel:	20,000 s.f. / 180+ rooms
Residential units:	30
Impacted Lots:	6
Demolished Buildings:	1

Environmental Impacts:

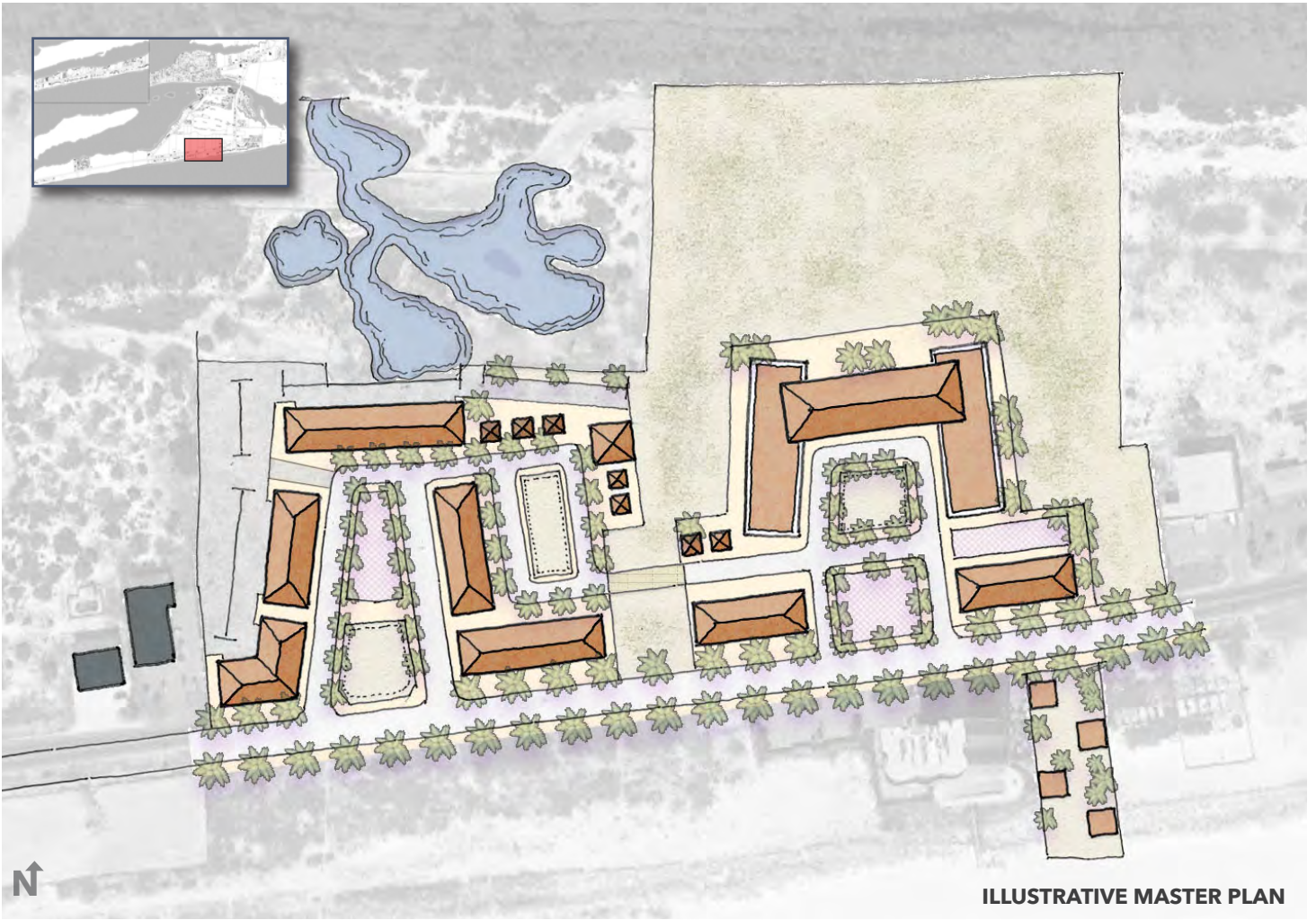
Wetlands:	1.03 acres
Critical Habitat:	0.28 acres

WCI Pre-Permitted Critical Habitat:

Total:	13.06 acres
Critical Habitat Preserved:	3.73 acres
Critical Habitat Affected:	9.33 acres

TOWN CENTER LOCATION 'B'

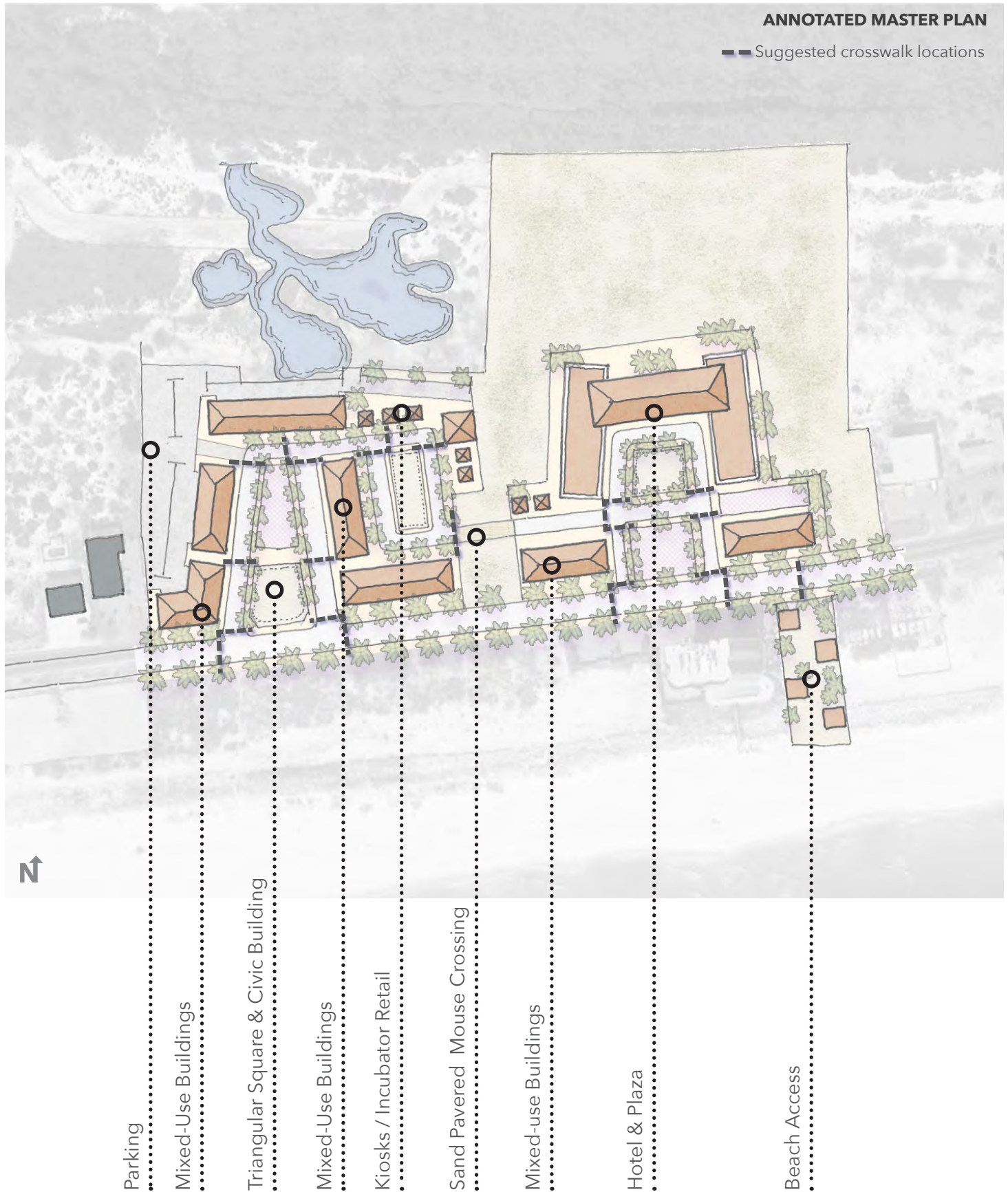
MASTER PLAN

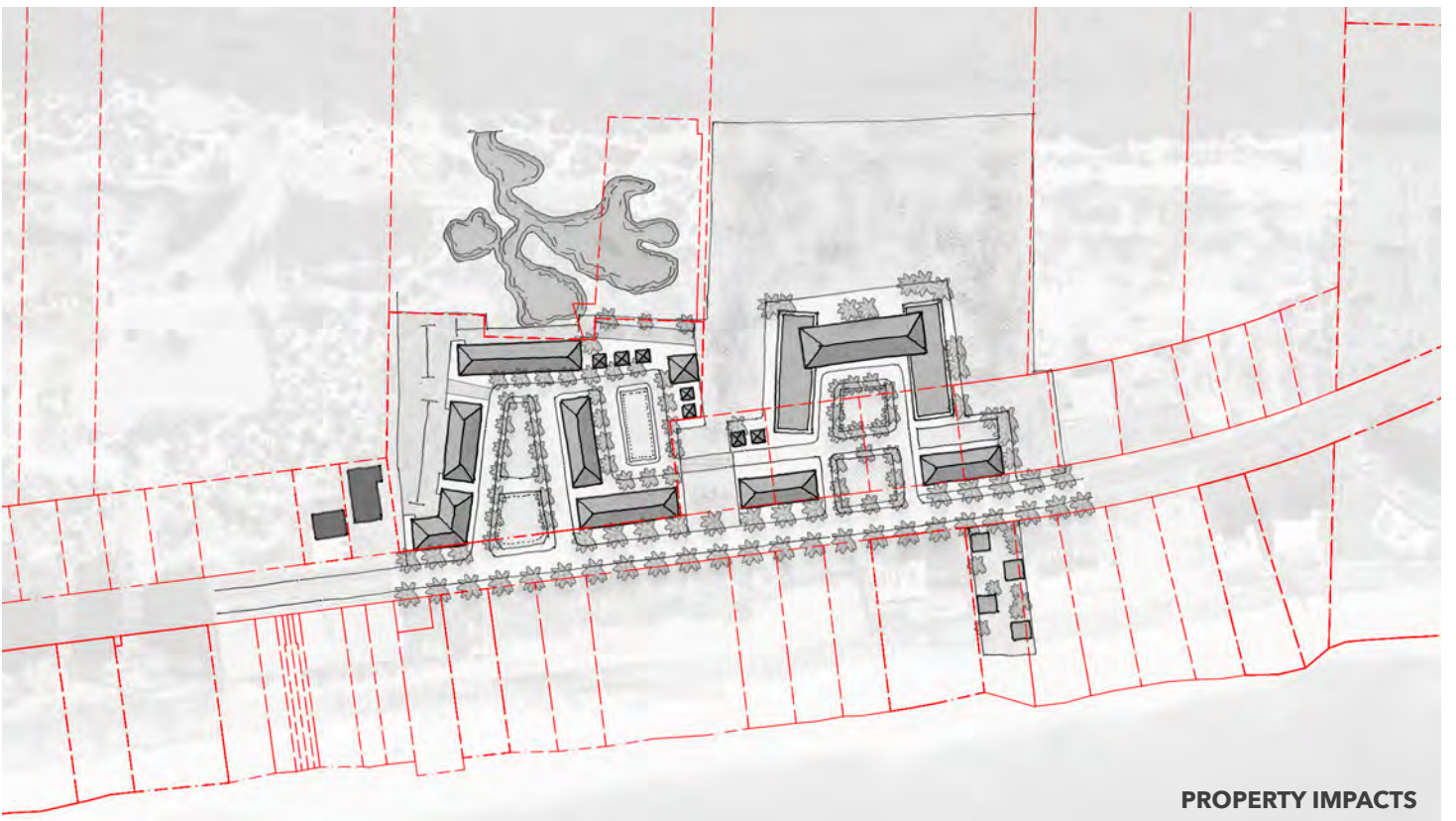
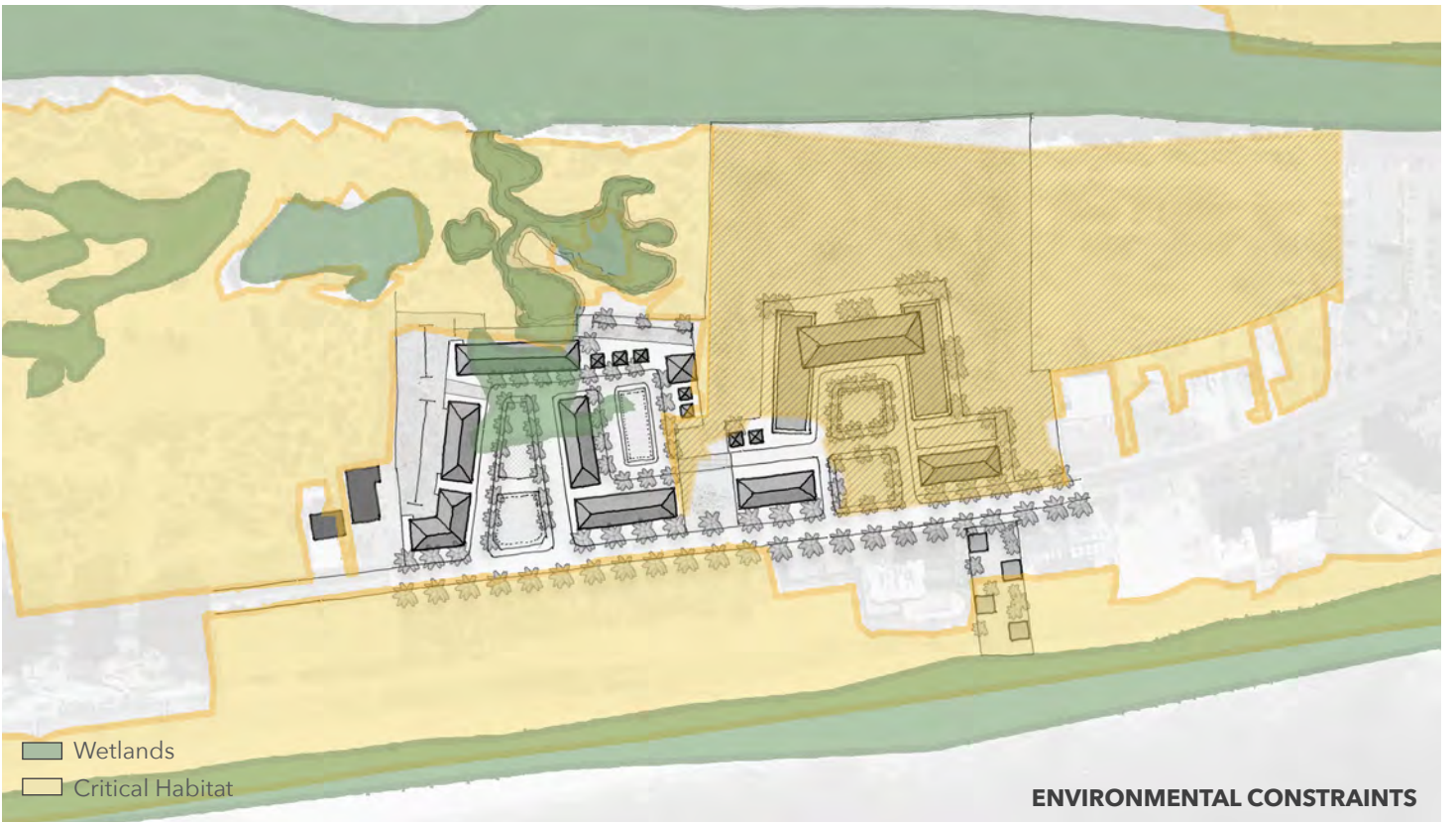


INFRASTRUCTURE COSTS (X \$1,000)			
	Minimum	Average	Maximum
Streets	\$69.3	\$100.8	\$132.2
Asphalt	\$17.2	\$34.9	\$52.7
Concrete	\$56.6	\$84.2	\$111.8
Sanitary Sewer	\$39.5	\$57.6	\$75.7
Water	\$28.6	\$54.6	\$80.6
Gas	\$21.5	\$41.0	\$60.5
Stormwater	\$132.1	\$187.0	\$241.8
Total	\$364.60	\$559.94	\$755.28

TOWN CENTER LOCATION 'B'

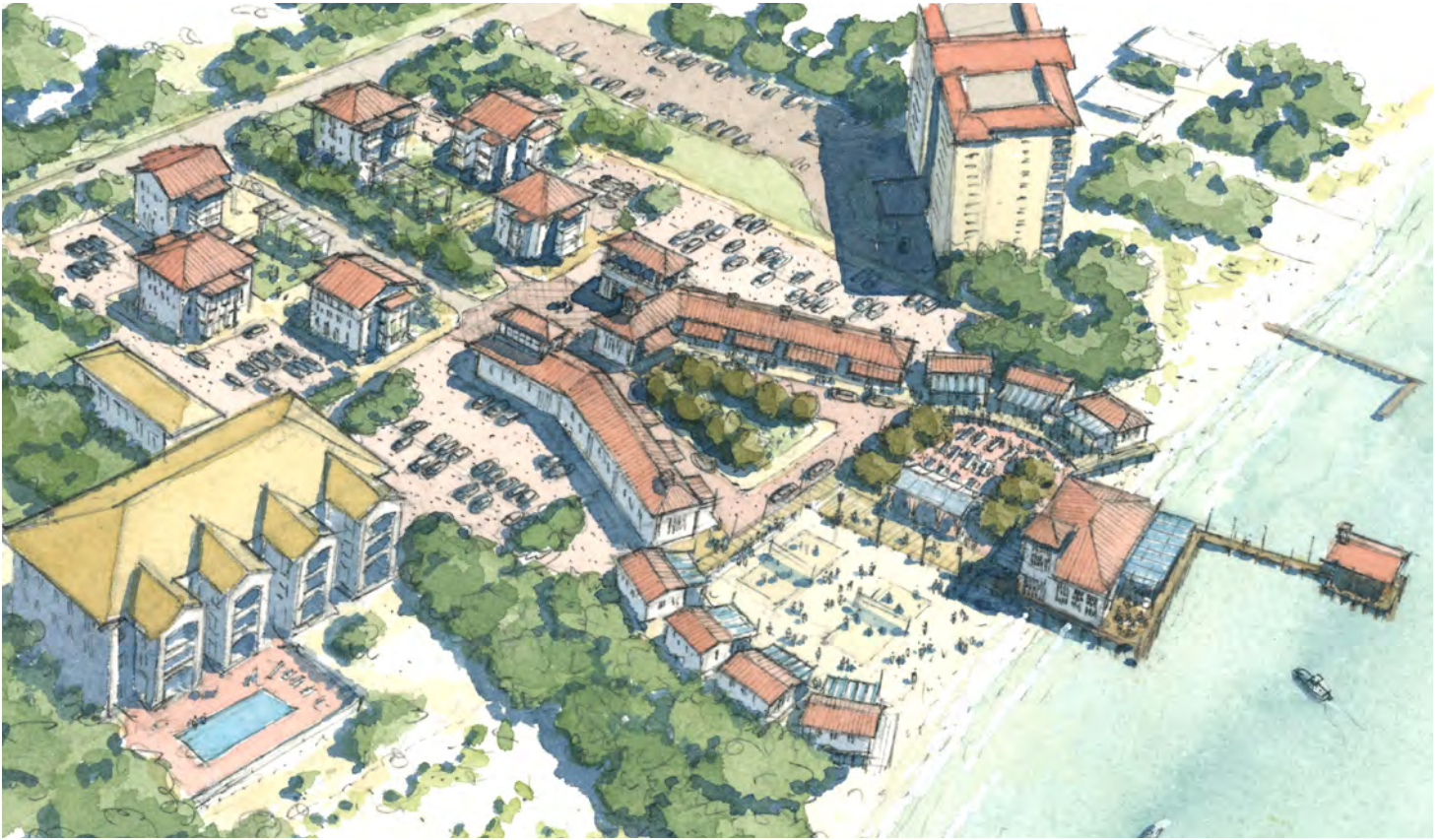
MASTER PLAN





TOWN CENTER LOCATION 'C'
MASTER PLAN

NORTH RIVER ROAD BOARDWALK



(above): This illustration depicts a waterfront neighborhood center of a different scale and character to the other proposed town centers. This site is located on the northern portion of River Road, next to the ‘Sailmaker Place”, directly on the intracoastal waterway and on the residentially zoned properties sandwiched between commercially zoned properties. Low-scale retail shops and restaurants surround a wide boardwalk and plaza along the water.

(next page): The ‘North River Road Boardwalk’ design staggers six small (3-story) multi-family residential buildings along and behind River Road. Both sides of the entry drive into the property have three buildings each, centered around a central green, with parking in the rear. The drive frames to view to the small retail plaza. The retail opens up to the water to dramatic views across and along the intracoastal waterway. A signature retail building is prominently placed at the water’s edge, giving the impression that the building further defines the plaza, but also encroaches into the water.

Building Program:

Retail:	25,000 s.f.
Residential units:	36
Impacted Lots:	4
Demolished Buildings:	4

Environmental Impacts:

Wetlands:	No Impact
Critical Habitat:	No Impact

INFRASTRUCTURE COSTS (X \$1,000)			
	Minimum	Average	Maximum
Streets	\$152.2	\$221.3	\$290.4
Asphalt	\$37.7	\$76.7	\$115.6
Concrete	\$124.2	\$184.9	\$245.5
Sanitary Sewer	\$65.6	\$99.3	\$133.1
Water	\$62.8	\$119.9	\$177.0
Gas	\$47.1	\$89.9	\$132.8
Stormwater	\$169.3	\$238.0	\$306.6
Total	\$658.88	\$1,029.96	\$1,401.05

TOWN CENTER LOCATION 'C'

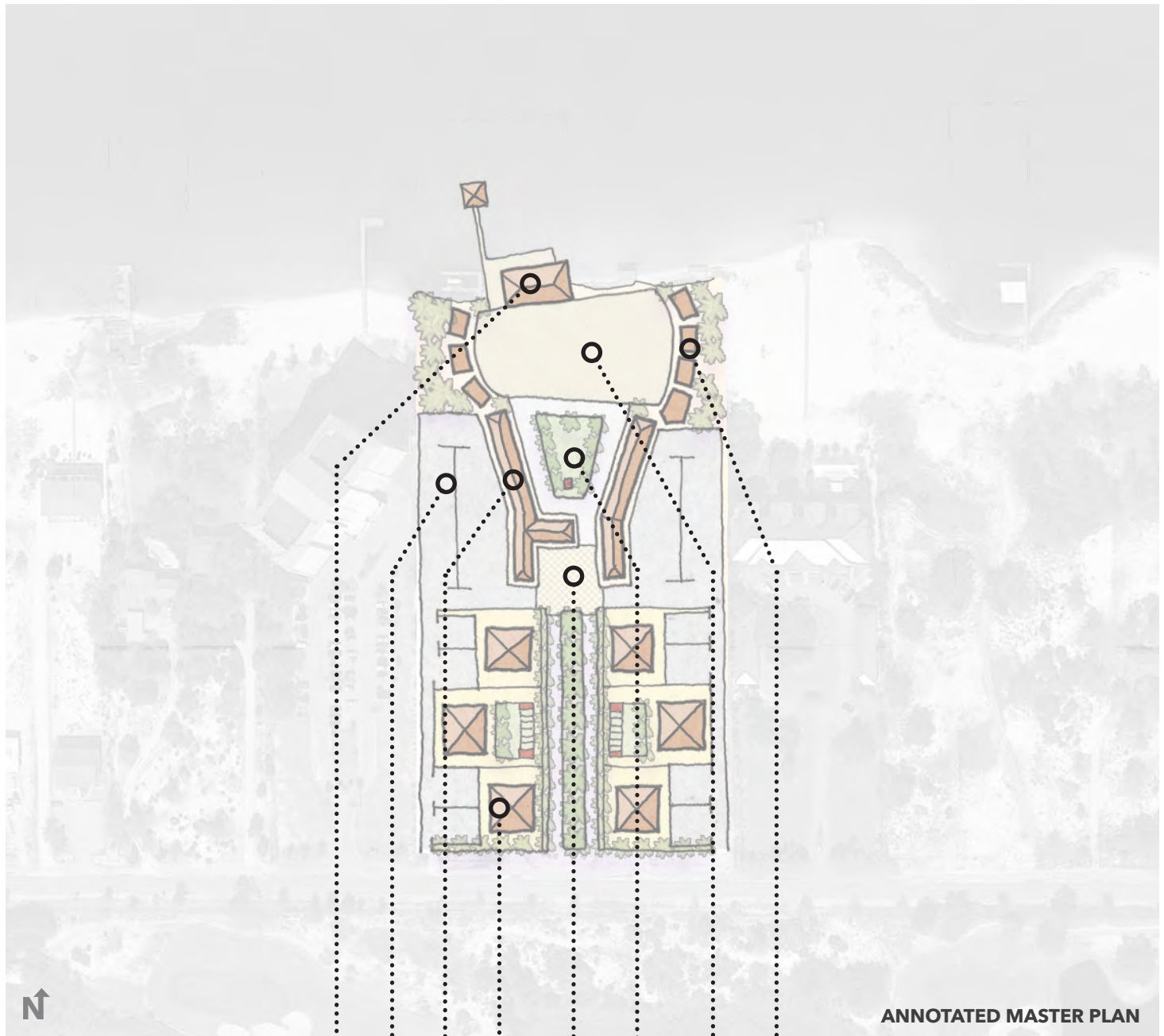
MASTER PLAN



ILLUSTRATIVE MASTER PLAN

TOWN CENTER LOCATION 'C'

MASTER PLAN

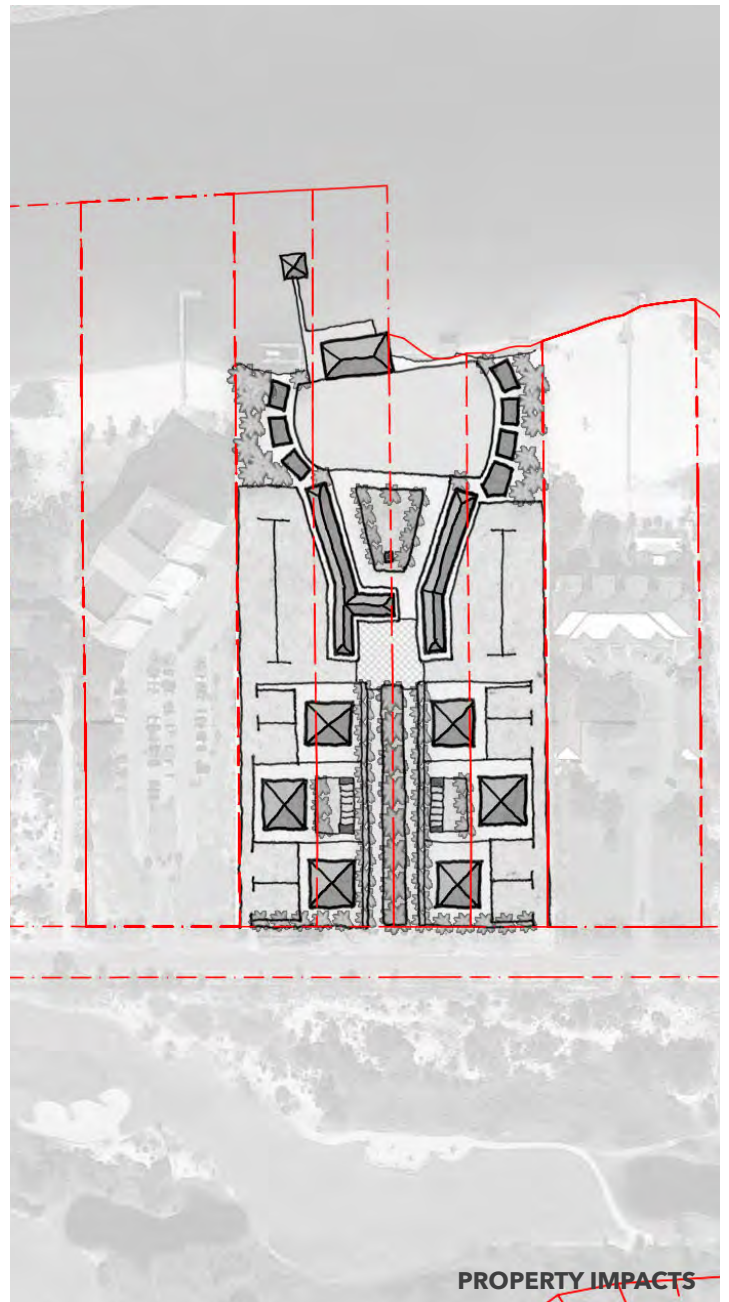
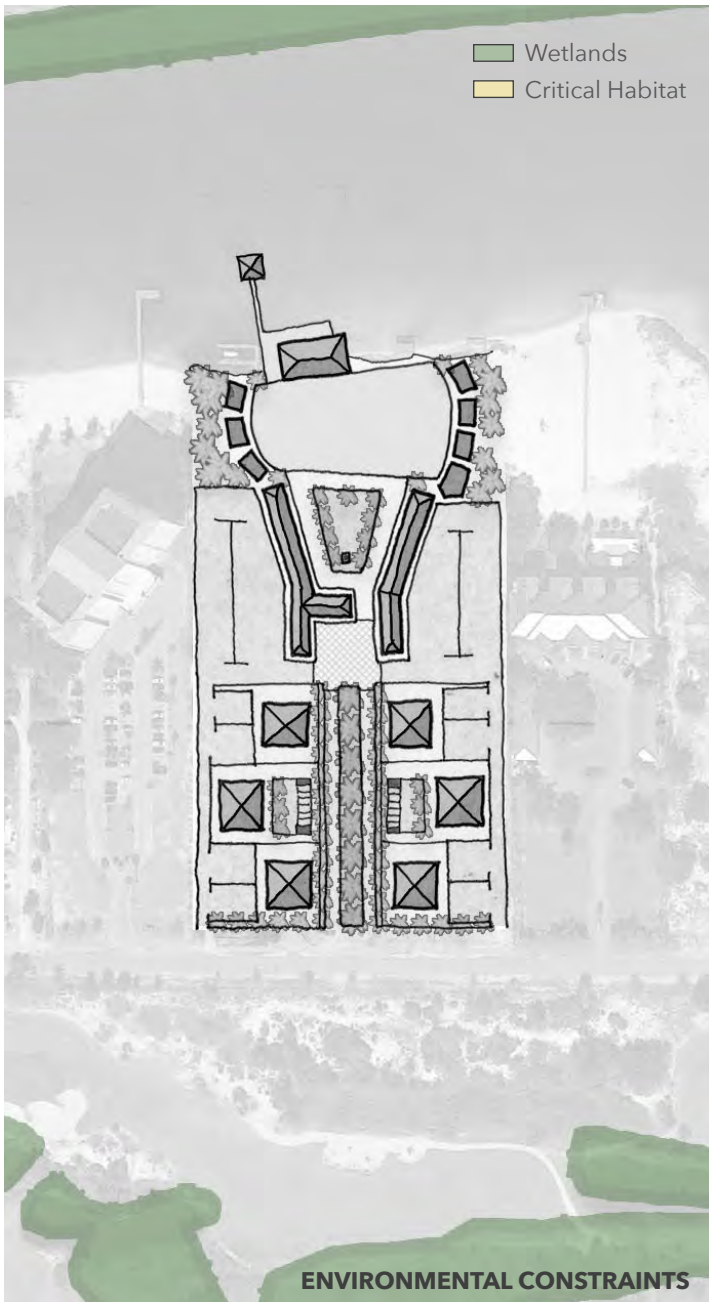


ANNOTATED MASTER PLAN

- Floating Restaurant & Bar
- Parking
- Mixed-Use Buildings
- Small Multi-family Buildings
- Plaza Terminating the Avenue
- Green
- Beach & Extended Boardwalk
- Incubator Retail

TOWN CENTER LOCATION 'C'

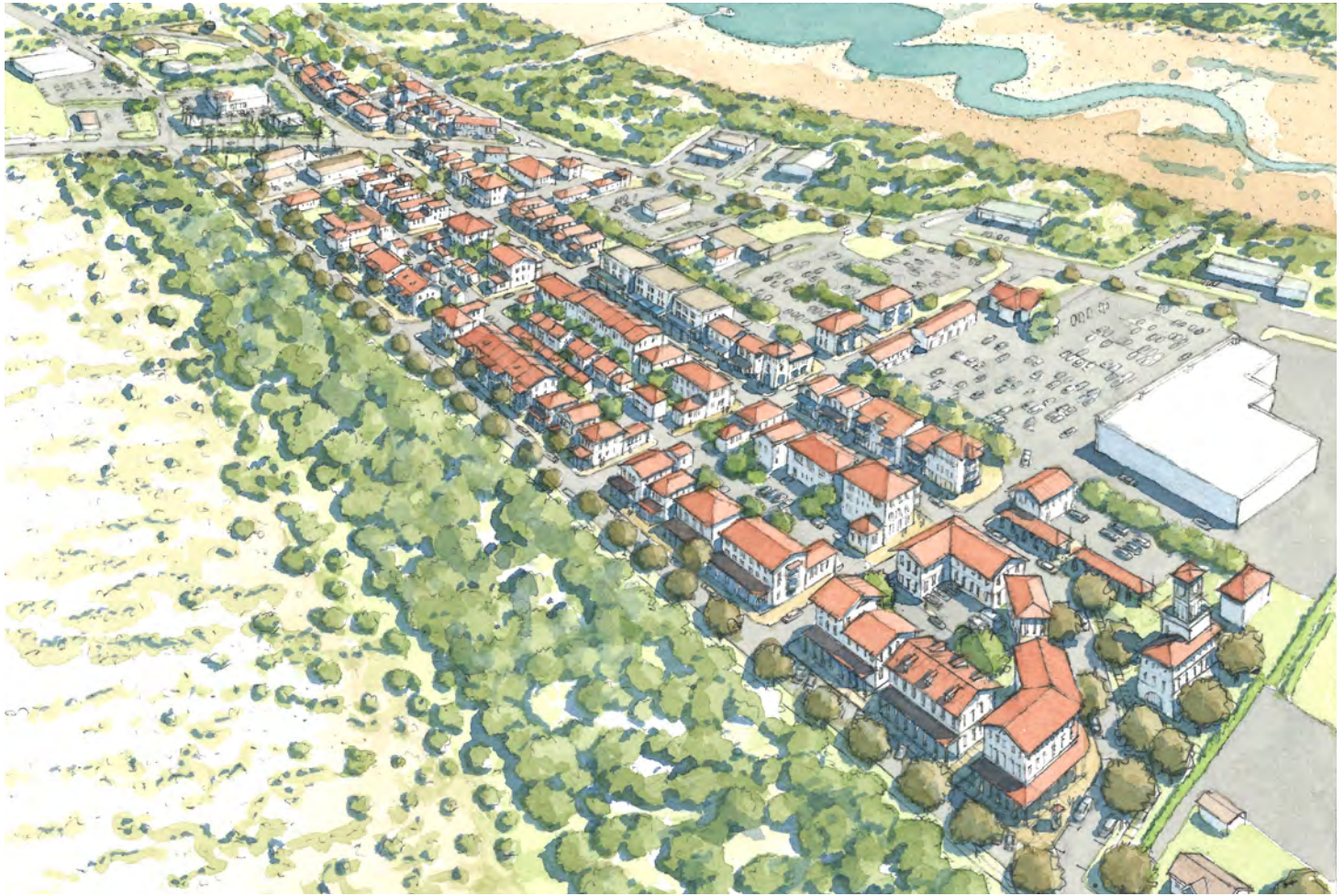
MASTER PLAN



TOWN CENTER LOCATION 'D'

MASTER PLAN

INNERARITY HEIGHTS



(above): This illustration depicts the re-stitching of the Innerarity Heights neighborhood, reintroducing it back to its historic grid configuration of 1924.

(next page): The principal design idea behind the Innerarity Heights plan is to re-establish the connected grid that once existed in this neighborhood, with the aim to alleviate traffic problems in the area, but more importantly, to create a more elegant entry into Perdido Key. The current street layout forces all vehicular traffic to one node rather than allowing them to disperse naturally across the network of connected streets. Additionally, the proposed, smaller walkable block sizes lend themselves to a great variety of building types along a parallel main street, allowing for its incremental development to naturally occur as large-scale and small scale buildings can be accommodated on this type of block pattern. In all cases, parking is located towards the rear of the lots, along alleys where possible and/or shielded from public frontages. Lastly, both ends of the main street terminate on civic buildings with the community center / church on the west side now fronting a formal green.

Environmental Impacts:

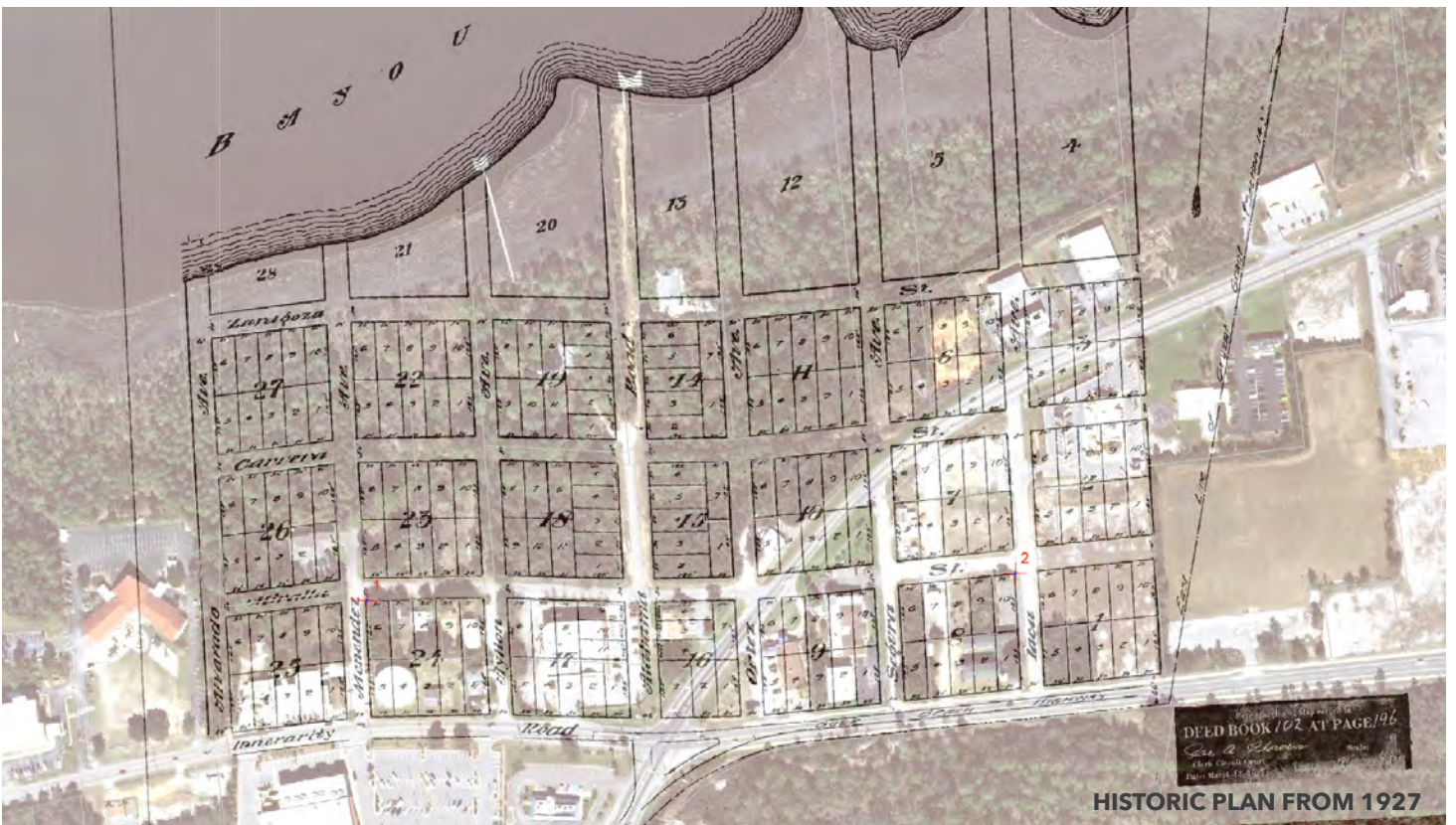
Wetlands:	No Impact
Critical Habitat:	No Impact
Impacted Lots:	37
Demolished Buildings:	0

INFRASTRUCTURE COSTS (X \$1,000)			
	Minimum	Average	Maximum
Streets	\$708.4	\$1,030.3	\$1,352.1
Asphalt	\$175.5	\$356.9	\$538.3
Concrete	\$578.2	\$860.7	\$1,143.1
Sanitary Sewer	\$324.8	\$487.4	\$649.9
Water	\$292.4	\$558.3	\$824.1
Gas	\$219.3	\$418.7	\$618.1
Stormwater	\$744.8	\$1,061.4	\$1,377.9
Total	\$3,043.48	\$4,773.50	\$6,503.52

TOWN CENTER LOCATION 'D'
MASTER PLAN



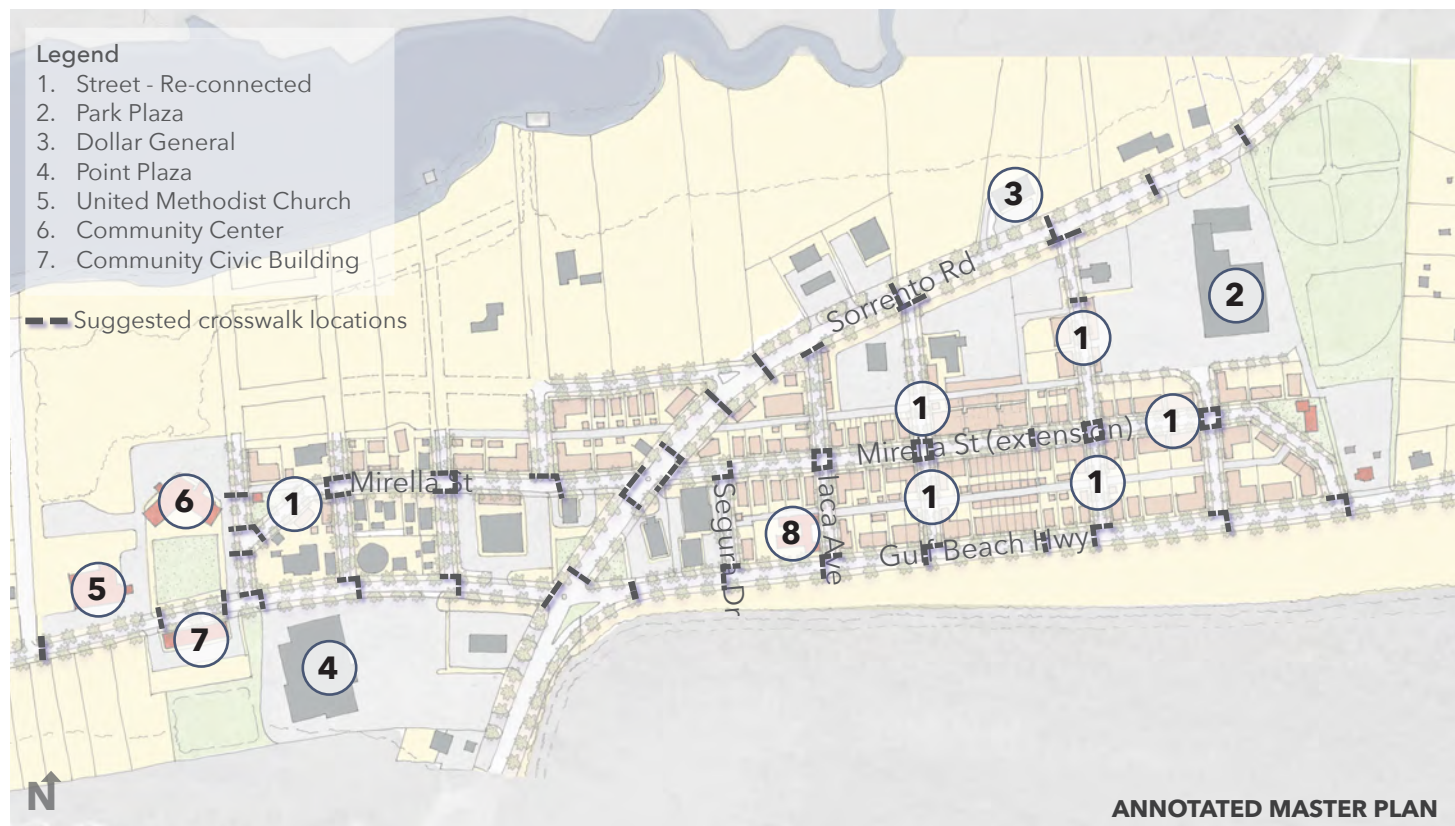
ILLUSTRATIVE MASTER PLAN



HISTORIC PLAN FROM 1927

TOWN CENTER LOCATION 'D'

MASTER PLAN

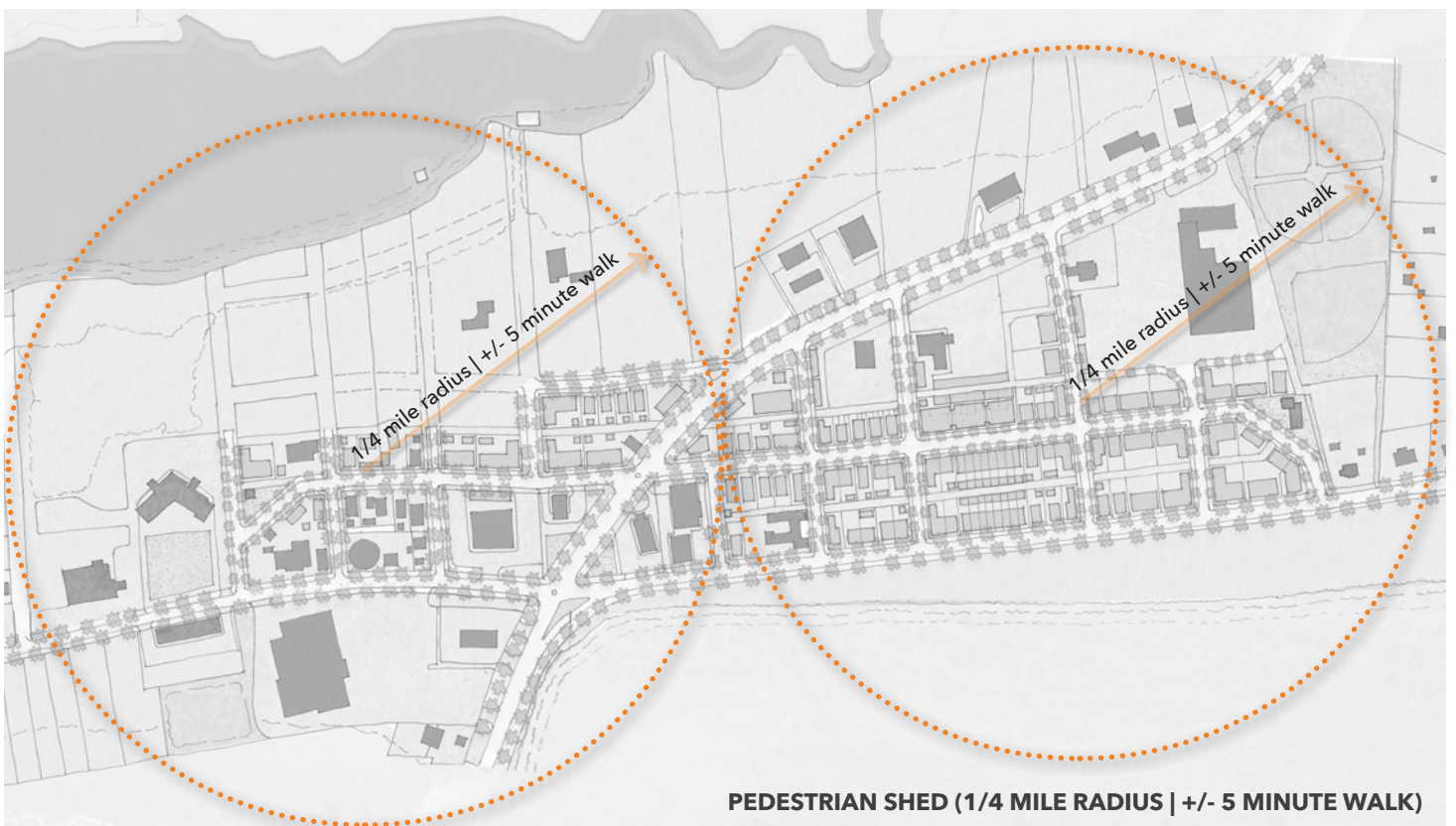


TOWN CENTER LOCATION 'D'

MASTER PLAN



NEW STREETS



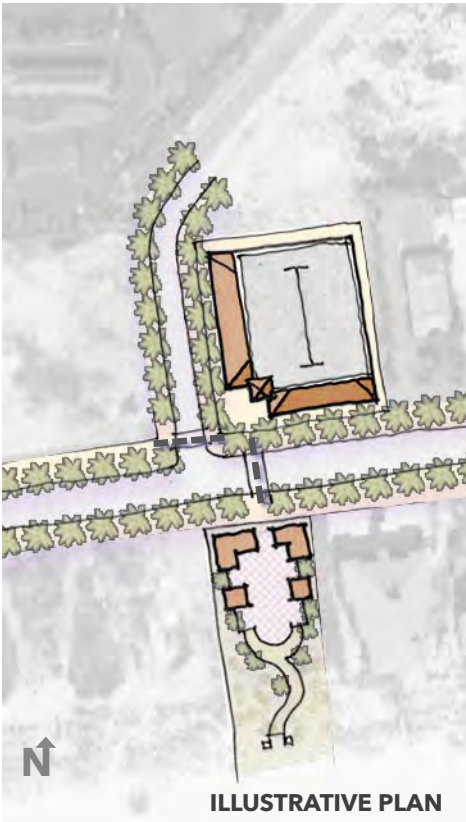
PEDESTRIAN SHED (1/4 MILE RADIUS | +/- 5 MINUTE WALK)

TOWN CENTER LOCATION 'D'

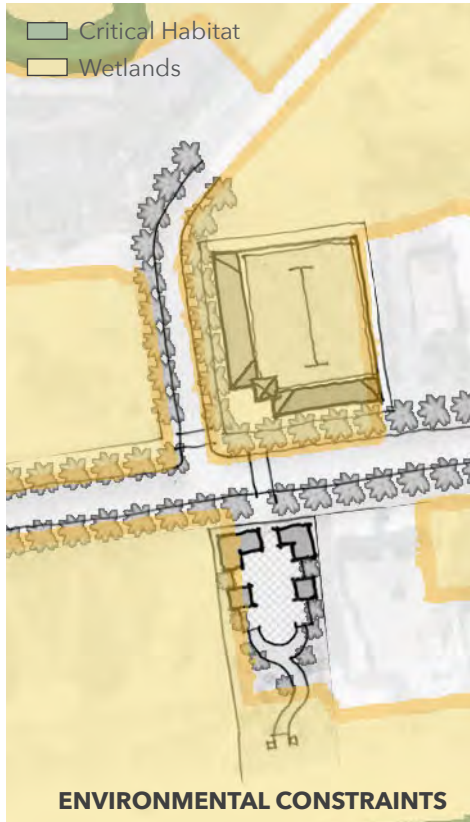
MASTER PLAN



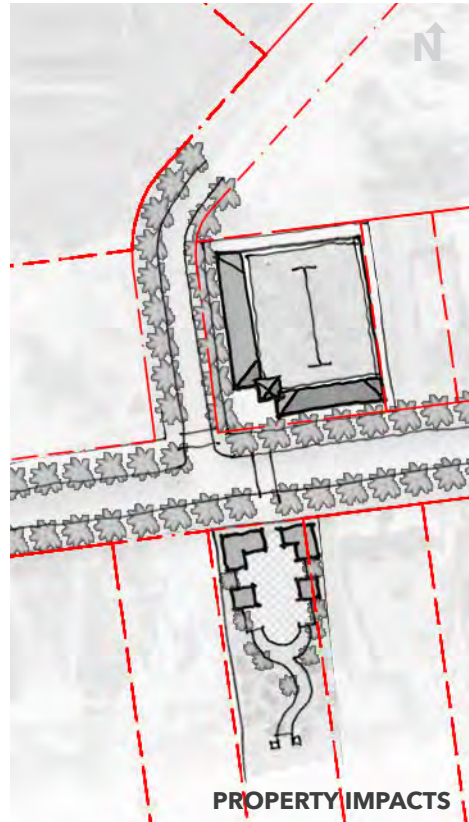
BEACH ACCESS PARKING MASTER PLAN



ILLUSTRATIVE PLAN



ENVIRONMENTAL CONSTRAINTS



PROPERTY IMPACTS

— Suggested crosswalk locations



Building Program:	
Retail:	7000 s.f.
Residential units:	0
Impacted Lots:	2
Demolished Buildings:	0
Environmental Impacts:	
Wetlands:	No Impact
Critical Habitat:	1.03 acres

The lack of readily available beach parking was often mentioned as a deterrent to attracting visitors to the Key and its beaches. Additionally, many condo buildings, turned rental, also indicated a shortage of parking at times, extreme. As a result, finding appropriate plots on which to build financially viable structured parking garages was also a goal of this design charrette.

The owner of a plot, on the north-east side of Perdido Key Drive and River Road has one such property. This site plan provides a design for a parking garage lined with retail building on two sides to help offset the construction cost of the parking.

RETAIL CENTER EXPANSION

MASTER PLAN

FLORA-BAMA



The plan for Flora-Bama remained unchanged from the detailed 2012 proposal as conditions have remained the same. It's potential to evolve to a pedestrian-oriented neighborhood center, framing both sides of Perdido Key Drive and providing a memorable western gateway into Perdido Key.

The master plan for this area groups together properties under single ownership and creates a consistent street frontage as well as an attractive waterfront destination, taking advantage of the two unique attributes of this site, the street frontage on the Florida/Alabama border and the water frontage on the north and south sides of Perdido Key Drive.

Building Program:

Retail:	45,000 s.f.
Hotel:	20-40 rooms
Residential units:	54
Impacted Lots:	14
Demolished Buildings:	6

Environmental Impacts:

Wetlands:	No Impact
Critical Habitat:	.49 acres

INFRASTRUCTURE COSTS (X \$1,000)			
	Minimum	Average	Maximum
Streets	\$69.3	\$100.8	\$132.2
Asphalt	\$90.1	\$183.3	\$276.4
Concrete	\$296.9	\$442.0	\$587.0
Sanitary Sewer	\$162.2	\$244.4	\$326.6
Water	\$150.2	\$286.7	\$423.2
Gas	\$112.6	\$215.0	\$317.4
Stormwater	\$371.6	\$526.8	\$682.0
Total	\$1,547.35	\$2,427.01	\$3,306.66

RETAIL CENTER EXPANSION MASTER PLAN



ILLUSTRATIVE MASTER PLAN



- Wetlands
- Critical Habitat

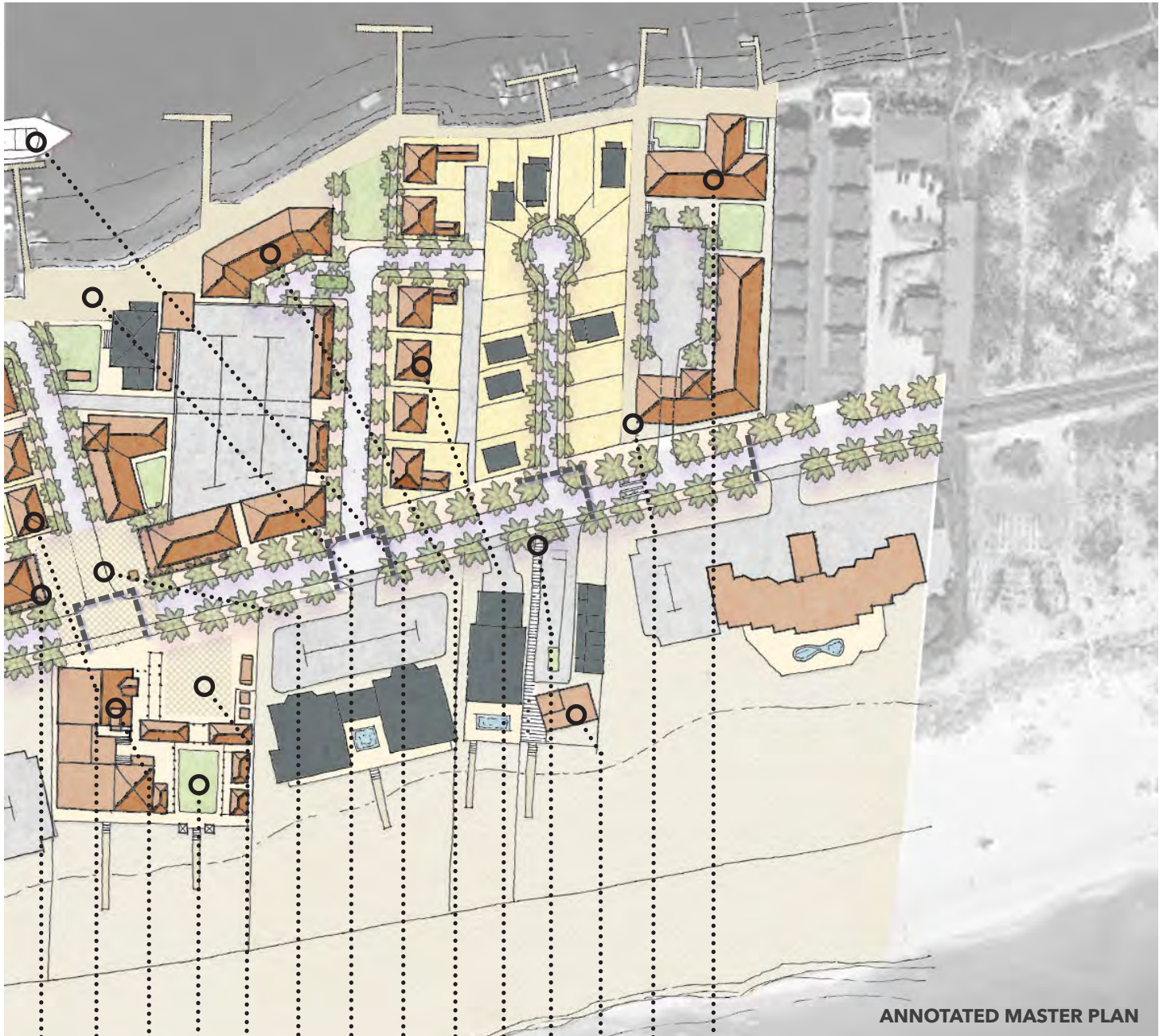
ENVIRONMENTAL CONSTRAINTS



PROPERTY IMPACTS

RETAIL CENTER EXPANSION

MASTER PLAN



ANNOTATED MASTER PLAN

— Suggested crosswalk locations

- Mixed Use
- 6-Plexes
- Flora-Bama
- Church/Party Green
- Parking Plaza
- Plaza (Traffic calming)
- Boardwalk
- Flora-Bama Paddle Boat
- Motel (Option 1)
- 6-Plexes
- Public Access
- Proposed Condo
- Public Access
- Restaurant

Specific technical assessment criteria for five categories, were established for the evaluation of each Plan into one of three types: 1) Good, 2) Better and 3) Best. Once each Plan was ranked by category, they were then weighted evenly, and tallied for an overall ranking of technical merit.

The assessment criteria are grouped under their main category below, along with the assumptions made by each consultant vis-à-vis their Plan evaluations.

1. ENVIRONMENTAL CONSIDERATIONS AND ASSUMPTIONS

Development should ensure Perdido Key's diversity is protected and enhanced where possible.

- What is the magnitude of impact to the critical habitat?
- What is the impact to, and proposed mitigation of the wetlands?
- Who will this affect the development cap imposed on the Key?
- What is the impact of the Land Development Code, such as buffers and trees?

Six potential town center configurations were evaluated and then ranked based on the degree of ecological impacts associated with each design. The two ecological perimeters evaluated were Perdido Key Beach Mouse habitat and Jurisdictional Wetlands. The lowest score corresponded with the highest level of ecological impacts. The highest score indicated that neither wetlands nor beach mouse habitat would be impacted if that design was selected.

Constructing the highest ranked town center, the Village Center will involve the loss of 7.58-acres of beach mouse habitat and 7.09-acres of wetlands. This would ultimately require a land swap of 5 acres with anybody with pre-negotiated HCP lands, to be a viable option. The remaining sites were stratified according to the impact levels.

Once a town center design moves forward more definitively, it will have to be cross-referenced against the allowable impact acres / zoning category / five-year term to ensure the impacted areas are within the negotiated levels.

2. TRANSPORTATION CONSIDERATIONS AND ASSUMPTIONS

Development should enhance mobility options, such as walking and bicycling.

- Are streets connected wherever possible and/or a more continuous network formed?
- Are walkable, pedestrian-friendly streets provided?

3. INFRASTRUCTURE CONSIDERATIONS AND ASSUMPTIONS

Development should utilize existing infrastructure as much as possible.

- What is the impact on Perdido Key Drive, as well as other necessary street improvements?
- What is the cost impact on necessary utilities & stormwater improvements?

The River Road town center design was chosen as the representative Town Center because of its mix of all the infrastructure elements being estimated. Approximate areas of streets, sidewalks, parking areas, and building footprints were determined to get an idea of overall impervious coverage. An estimate regarding what portions of that impervious would likely be asphalt, concrete, or building was determined and entered into the current Escambia County Pricing Agreement to estimate construction costs.

Using these approximate values for impervious coverage, a weighted runoff coefficient and time of concentration for the site was calculated and used in a basic stormwater model to estimate a plausible retention volume. It was assumed that all stormwater management will be above ground storage ponds. This assumption was made based on a seasonal high water table that will most likely be adverse to underground stormwater retention.

For utilities, sanitary sewer, water, and gas were drawn on the aerial photos and measured by our CAD technicians in AutoCAD. It was found that a ballpark estimate for these three could be reduced to a function of total street length.

These assumptions were verified on other town centers. Each subsequent town center was estimated using the relationships between sewer/water/gas and street length. All quantities that were estimated were entered into the Escambia County Pricing Agreement (GPAD_PD 14-15.064) for an estimate of cost. Since the Pricing Agreement contained unit cost information from multiple contractors, the minimum, average, and maximum prices were shown in the infrastructure estimate.

The ranking of each center was determined primarily by the cost per acre of infrastructure, taking into account the potential market return, i.e. area of retail in contrast to the amount of infrastructure needs.

4. URBAN DESIGN CONSIDERATIONS AND ASSUMPTIONS

Perdido Key should be provided with a well-designed, vibrant town center.

- What is the number of impacted properties?
- What is the willingness of property owners to redevelop?
- Does the existing zoning permit the type of development?
- Does the development meet the goals of the PKA and other stakeholders?
- Is the development proximate to beach access?
- Does the development provide access to public open space?
- What is the development's place-making potential and does it enhance the public realm?

The urban design criteria used to evaluate each plan starts off with the assumption that they all meet minimum new urbanist considerations such as buildings sited to properly frame and shape streets, formed open spaces fronted by streets on at least two sides, similar-scaled buildings fronting each other, retail at grade where it makes sense and hidden parking behind buildings.

Above and beyond the urban design assumptions, one of the most compelling criteria was a property owner's willingness to develop their property as a town center location with all its associated implications. This is arguably the most important criteria of them all.

Other criteria included:

- Viability of the location and its proximity to public beach access, meaning those closest to beach access have a slight advantage over those with more indirect connections to beach access points.
- The number of properties impacted, meaning those that involved no adjustments to existing property lines or only one property owner, were ranked more favorably than those requiring a collaboration between property owners, more than one property owner, the demolition or relocation of structures or parking areas and/or impacts or necessary build-outs of portions of existing built parcels to make the town center location work.
- Existing zoning implications, meaning the existing zoning on town center properties permits the kind of mixed-use development required. Given the HCP limitations, properties requiring a rezoning would be subject to a much higher degree of scrutiny vis-à-vis the allowable acres of impacted mouse habitat land now permitted within each zoning category.
- Potential for place-making and the quality of public realm, meaning how memorable would the town center location be, and what are the buildings relationship to the public spaces.
- The realistic potential for development to happen, meaning how likely is the property to redevelopment, and how soon?

5. RETAIL CONSIDERATIONS AND ASSUMPTIONS

The town center should be commercially viable and encourage economic vitality.

- Does the development provide memorable moments?
- Is the development in the best location to enhance its changes to be economically successfully?
- Is the development visible from Perdido Key Drive?
- Is the development at a sufficient/ appropriate scale of established center typologies?
- Is the development sustainable in its current form?

Each plan was evaluated based on the criteria above with detailed pros and cons of each design from a retail viability standpoint listed below.

Plan A1 Triangle: An excellent plan; will create needed retail view and a sense of driving through the shopping district.

- Provides visibility for small retailers along Perdido Key Drive.
- On-street parking will be essential for shops lining Perdido Key Drive.
- Shops in square (triangle) will have difficult time operating two fronts, therefore will likely close one side.
- Anchor location should work.
- Shops along Johnson Beach Road will be challenging to operate due to remote location, however they could work as a restaurant.
- Small buildings along the south side of Johnson Beach Road could function as pop-up retail sheds but may work better in a cluster around a small plaza.

Plan A-Square About: Based on Lake Forest, Market Square, this plan provides good views from Perdido Key Drive and a potentially excellent square. This type of model almost always works

- Center's location along east side of Perdido Key Drive is not as good as if located on the west side, as it would be difficult for home-bound traffic to make a quick stop.
- Shops on south side may be lacking necessary parking.
- On-street parking required around all sides of square. Parallel parking is recommended.
- The east side of town center should be completely lined with retail, instead of the proposed opening.
- Proposed retail sheds in square may block off needed views of retail.
- May be impossible to permit two curb cuts on Perdido Key Drive.

Oval West: A good plan, that ties nicely into existing retail center.

- West side of Perdido Key Drive offers home-bound traffic an easy right turn into the center.
- Large natural area may block views to shops if wooded.

- Single sided main street along north side of preservation area lacks needed double sided urbanism.
- Retail sheds occupy prime spot, could be relocated in back at an out of the way location.
- Retail in the back of center will be difficult to lease, but could more easily function as a restaurant or office.
- 73,000 sf is too large to support without a grocery store. If provided, a grocery store will demand direct frontage or view along Perdido Key Drive.
- Not sure on-street parking will be permitted along the Perdido Key Drive curve.

Village Center: One of the more challenging plans as it may be too far from Perdido Key Drive.

- Inline retailers have little view from Perdido Key Drive.
- Nice square design.
- Requires all retailers to have both a front and back which is unreasonable for many, possible for the exception building only.
- Recommend revising plan to address the issues above to make it a more viable plan.

Grand Villagio: A workable plan

- Located along the home-bound side of Perdido Key Drive, allows for easy right turn into center.
- Nice potential views of in-line shops.
- Pop-up retail sheds will block needed views of shops, should be removed or relocated to beach side.
- Beach side pop-up shops will work if on-street parking can be installed along Perdido Key Drive.
- Anchor building will be difficult to lease for retail, but could be a restaurant or hotel.

Cocina Village: A workable plan.

- Buildings fronting Perdido Key Drive will help announce the center and give it a needed signature.
- Well located along home-bound side of Perdido Key Drive.
- Two squares will help to provide a needed critical mass.
- 85,000 sf will require a grocery anchor.
- Center should have (but not required) on-street parking along Perdido Key Drive.

North River Road Boardwalk: Expensive, not very sustainable.

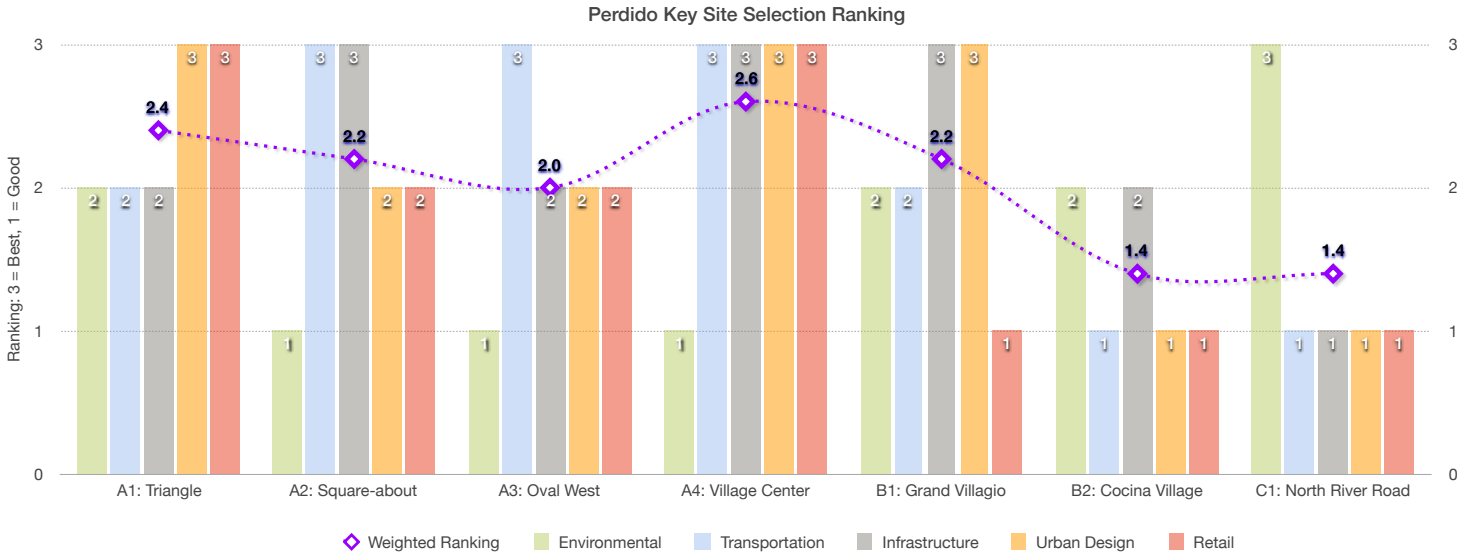
- Nice to front the river, but retail and restaurants along the riverfront and plaza are not sustainable.
- Multiple free standing buildings will be expensive to build.
- Only two of the buildings have needed roadway frontage.

TOWN CENTER EVALUATIONS & MATRIX

MASTER PLAN

Each plan was evaluated using the criteria on the previous pages and ranked by the relevant specialists in each field. Below is the result of the ranking of the plan alternatives.

A ranking scale of 1 - 3 was used with 1 representing the weakest and 3 the best. The results are graphically represented in the two-axis chart below. The bar graph shows the result by criteria and the line graph represents the weighted (20% for each) average for each plan.



This two-axis chart compares the ranking of each town center option with each other, collectively, as well as individually, by combining two charts into one. In this manner, one can assess the overall technical ranking of each town center option to each other as well.

The table below lists the technical ranking of each option by category. The resultant weighted ranking for

each Plan option is also included, assuming an equal 20% split among all five categories.

This technical ranking should be used to help inform and guide Escambia County, property owners and the PKA in their own evaluation (objective and subjective) of each town center option.

Table of Ranked Plan Alternatives

	WEIGHTED RANKING	ENVIRONMENTAL	TRANSPORTATION	INFRASTRUCTURE	URBAN DESIGN	RETAIL
A1: Triangle	2.4	2	2	2	3	3
A2: Square-about	2.2	1	3	3	2	2
A3: Oval West	2.0	1	3	2	2	2
A4: Village Center	2.6	1	3	3	3	3
B1: Grand Villagio	2.2	2	2	3	3	1
B2: Cocina Village	1.4	2	1	2	1	1
C1: North River Road	1.4	3	1	1	1	1



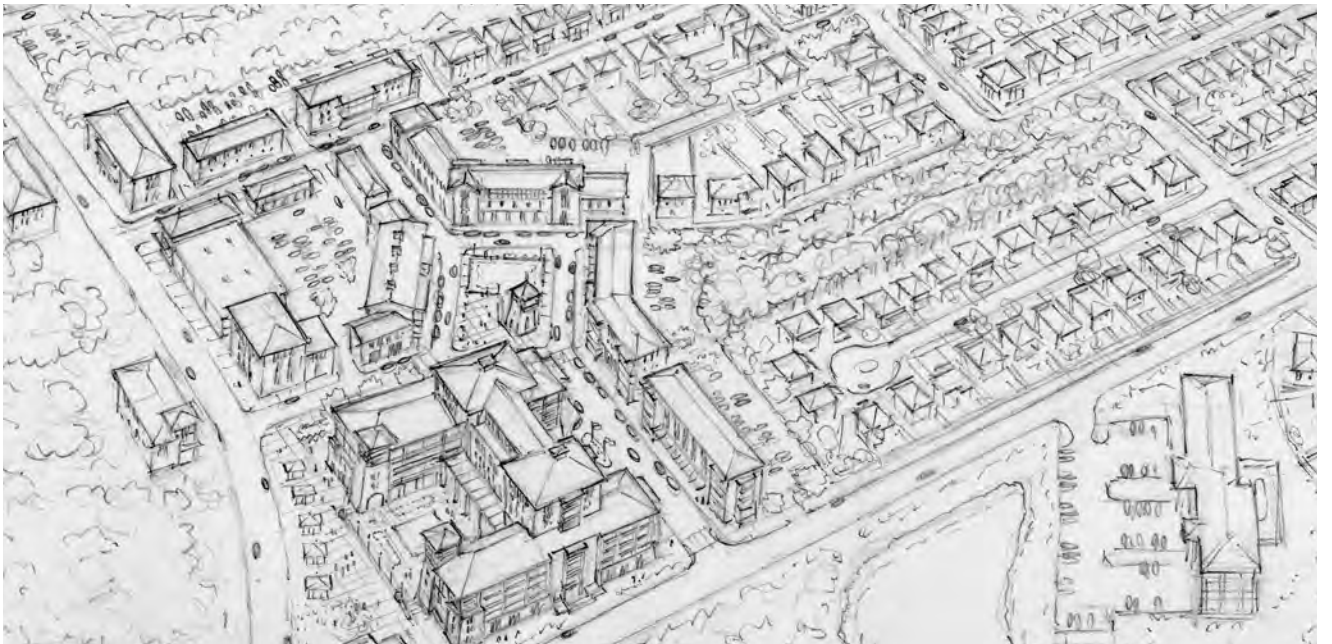
A review of Perdido Key’s zoning reveals that all zoning categories can essentially all be grouped into two general character areas.

1. **Rural / Conservation** - representing all properties that do not allow, or severely restrict development, such as Johnson Beach or Perdido Key State Park.
2. **Sub-Urban** - representing the vast majority of development on the Key, irrespective of its scale, massing, density, type or use, and principally organized around vehicular access and parking.

A third character category will be proposed as an overlay district (Perdido Key Town Center Overlay), over Perdido Keys existing zoning categories and for a limited area only:

3. **Compact Urban** - representing those areas where a higher standard for urbanism within a well-designed public realm will become a pre-requisite for development. This requirement will translate into modified or additional zoning regulations and guidelines for properties located within those designated areas that prioritize pedestrian-friendly development.

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TRANSPORTATION & INFRASTRUCTURE

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LU1 - TR2

Plan the urban structure 1st and the transportation 2nd.

Transportation planning in the 20th century placed a strong focus on anticipated travel demand and, to a lesser degree, environmental impacts. Given the strong policies encouraging automobile transportation, streets and highways were designed and built with a simple focus on moving traffic. With the resurgence of interest in walkability, bike ability and transit, increased priority is placed on designing streets with the human scale in mind.

When highly walkable places are desired, planners and designers must focus first on the urban form of a given place and second on the transportation design. Our abbreviation for this important principle is "LU1 - TR2", design urban form first and the transportation must be subordinate to that form.

The following section includes transportation and infrastructure recommendations for Perdido Key, to ensure alignment with the master plan goals.

PRINCIPLE 1: URBAN FORM FIRST

TRANSPORTATION & INFRASTRUCTURE

Pedestrian & Auto Oriented Streets



Perdido Key Drive has been designed for almost exclusive automobile use for many years. The paradigm is now changing. Interest in mobility by walking and bicycling is on the increase. Designers are beginning to associate street design with area context. The following images show highly walkable Winter Park Florida contrasted with a four-lane, fast arterial in a suburban power center. Finally Seaside Florida is shown

with its higher degree of walkability, achieved since its beginning in 1980. Two subsequent images show the contrast between one of Tallahassee's wide, auto dominant streets and a much more walkable street. In Portland Oregon.

If a Town Center location is to thrive along Perdido Key Drive, it must be made to be more pedestrian friendly.

PRINCIPLE 1: URBAN FORM FIRST
TRANSPORTATION & INFRASTRUCTURE



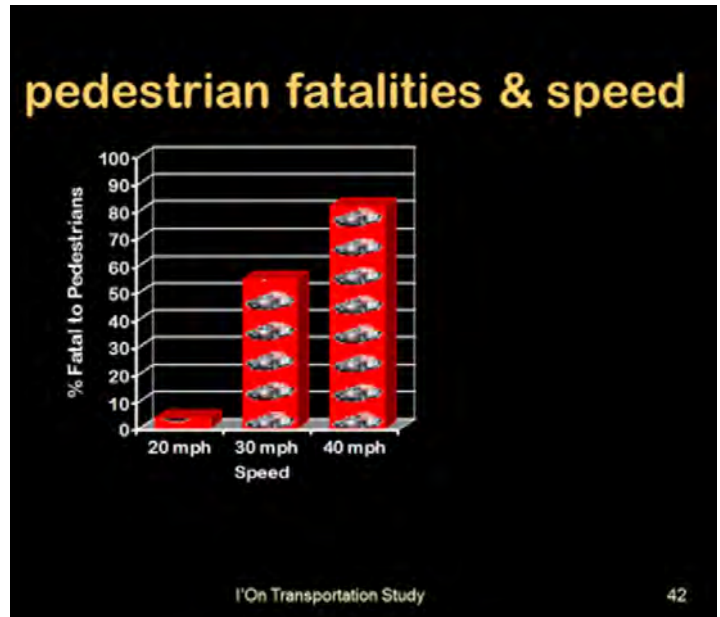
Transportation design must be subordinate to urban design in livable communities.



PRINCIPLE 2: SPEED

TRANSPORTATION & INFRASTRUCTURE

A second important principle in walkable community design centers on motor vehicle speed. This chart shows the probability of a fatal result if pedestrians are struck by motor vehicles 20, 30 and 40 mph.



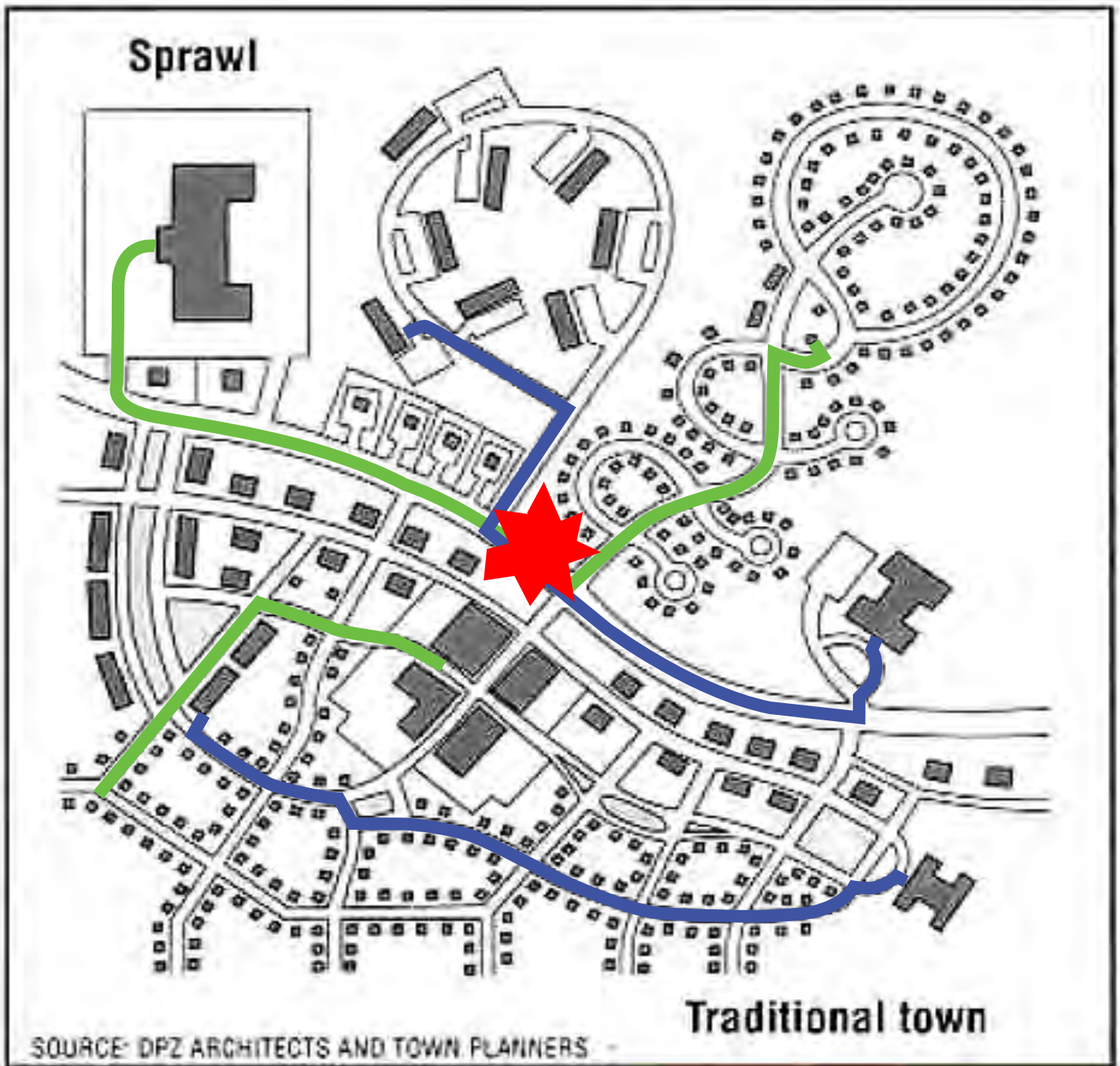
WALKABILITY

Design experience in the past 20 years led to the HPE walkability Index which incorporates the 10 walkability factors listed below, in reverse order. When designing a walkable places, small block size becomes the number one design element. Enclosure is achieved when buildings front the street with build-to-lines at the back of the sidewalk for commercial areas and compact front yards for residential areas. When land uses are sufficiently mixed, this also fosters more pedestrian travel. An excellent book describing these urban design options was written by Christopher Leinberger, entitled The Option of Urbanism. He defined to typical conditions, drivable suburban and walkable urban.



Top 10 Walkability Factors

10. Street Trees
9. Traffic Volumes
8. Sidewalks
7. Narrow Streets
6. Interconnected Streets
5. On Street Parking
4. Lower Traffic Speeds
3. Mixed Use Land
2. Buildings Fronting Street
1. Small Block Size



TND

Traditional
 Neighborhood
 Development

CSD

Conventional
 Suburban
 Development

The diagram demonstrates greater walkability on the lower pattern and more auto use on the upper, sprawl development pattern.

TND VS CSD

TRANSPORTATION & INFRASTRUCTURE

A Tale of Two Cities

Drivable Suburbanism:

FAR of .2-.4

Vehicle mobility only by LOS - America's default

Extensive surface parking and wide roads

Requires estimated 2/3 more energy than walkable urbanism

Walkable Urbanism:

FAR of .8-40

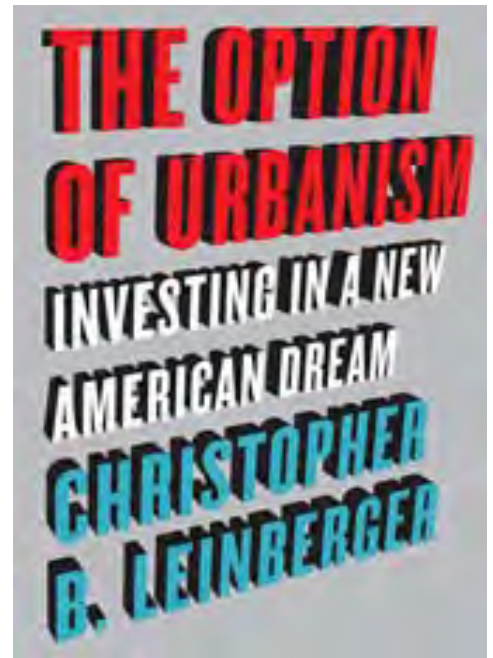
Total Mobility

Walking, biking, transit, and vehicle users

Urban form leads transportation design

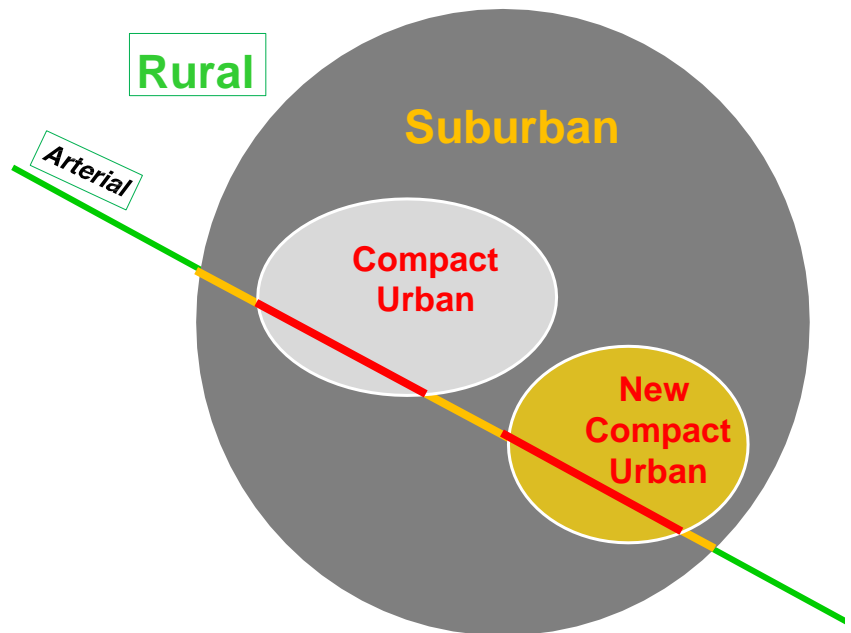
Often illegal today

from *Option of Urbanism* by Chris Leinberger



Augmented Functional Classification

When an arterial like Perdido Key Drive, crossed varying context areas or town centers, design elements must change to reflect the change of speed, travel mode, lighting, pedestrian presence and other key elements. This is best tied to a definition of context or character of place. Old compact areas are often blown out to allow fast travel to continue through. This violates the character of the place, for both existing and future compact, walkable places. Speed, as one factor must change to match the character, existing or proposed, by Planning and Zoning adoptions for the centers.



Sprawl Repair: Fixing the Public Realm

The techniques for converting an Auto Centric, suburban place to a pedestrian friendly one are clearly established. These sequential images show the type of street element changes needed for the portions of Perdido Key Drive that occur in the walkable mixed use areas.

Techniques of Sprawl Repair include the three stages shown below:

1. Existing - The least expensive arrangement of power distribution and fastest traffic flow
2. Public Investment - A reduction in lane width and number, with street trees added, and a center safety strip of rough texture
3. Private Investment - in response to street improvements, private buildings are redeveloped to meet the pedestrian scaled street to "complete the street."



THOROUGHFARE RETROFIT

TRANSPORTATION & INFRASTRUCTURE

Roundabout Safety

Decrease in Crashes:

Overall: 39%

Injury-Producing: 76%

Fatal or incapacitating: 90%

Crash reductions following installation of 40 roundabouts in the United State (IIHS, March 2000)

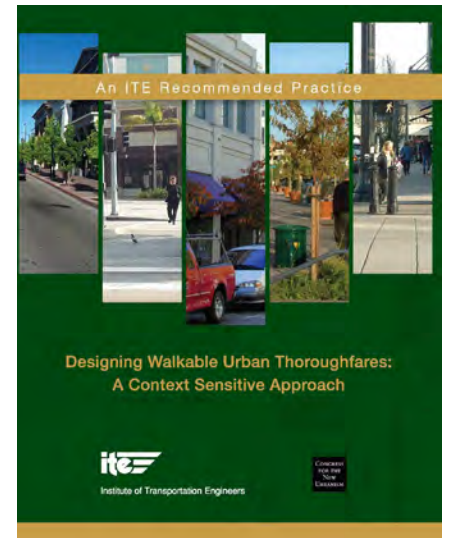


The Problem

The defined purpose & function of Perdido Key Drive is to serve only vehicle mobility (speed), resulting in little regard for context.

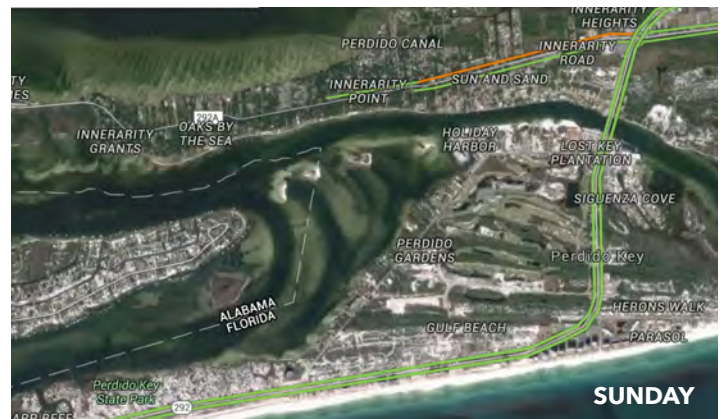
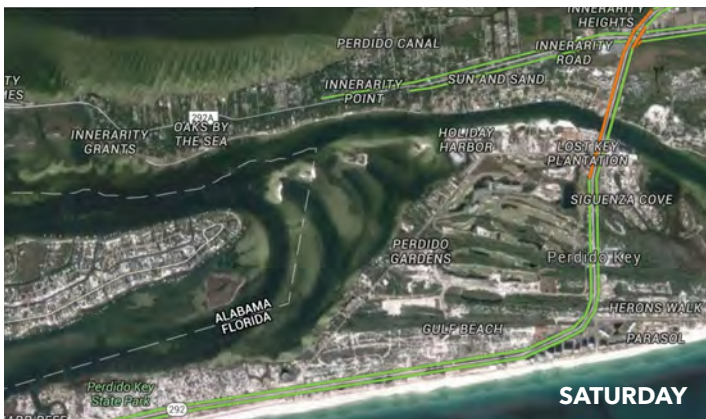
Let Cities be Cities

- Draw a line around walkable districts
- Adopt street designs with walking as a primary function
- When design conflict appears, decide in favor of the pedestrian
- Achieved in El Paso TX, Charlotte NC, Ranson WV, North Carolina DOT
- Liability is reduced for design professionals

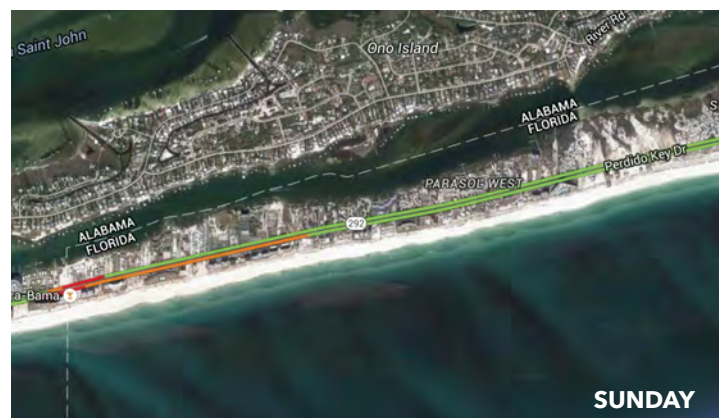
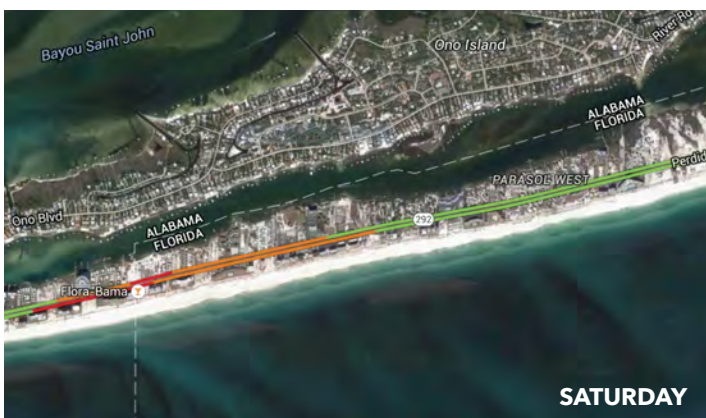


Traffic patterns have long dominated the question of street design. A more balanced, complete streets approach is encouraging consideration of more factors than traffic volumes. As seen in the chart below, the five year count history on several locations along State Road 292, Perdido Key Drive, show the average annual daily traffic is well below the general two lane street capacity of 18,000 vehicles per day. Also, over the five year time period, traffic shows little to no growth. The traffic volumes just south of Gulf Beach Highway are the most likely to benefit from increased street capacity later on.

Detailed street design requires peak hour estimates of traffic flow. In ideal traffic flow conditions, 1,800 vehicles per hour can flow along a single lane. With signals and other side friction, the single lane can carry 800 to 900 vehicles in an hour. Two lane streets are more walkable than four lane streets due to shorter crossing distances and lower speeds. The pedestrian crossing signals placed along Perdido Key Drive will greatly improve the walkability.



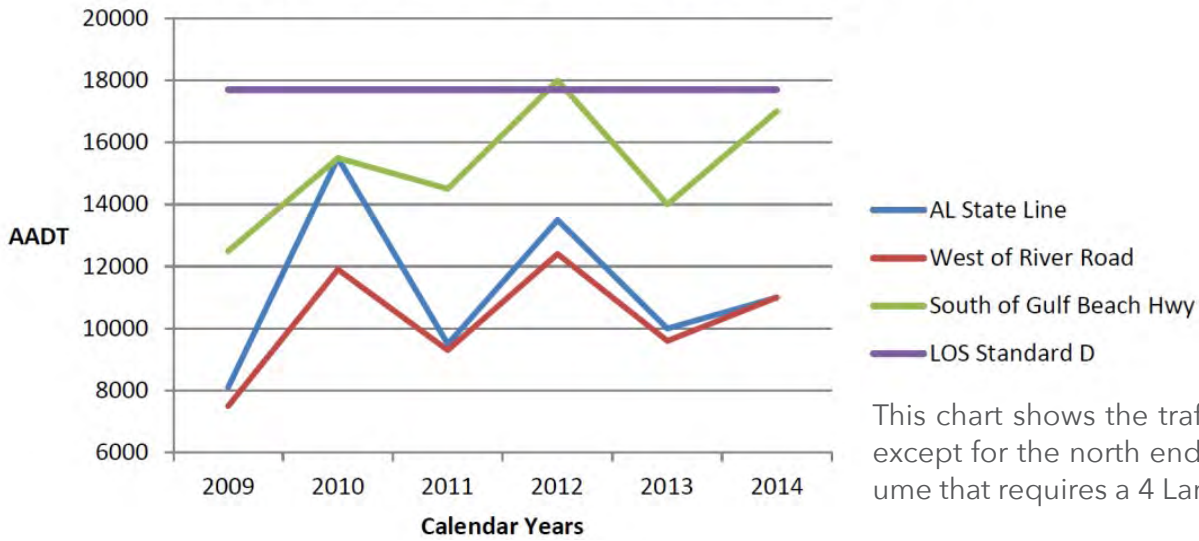
Traffic on the main section of the key from Innerarity Point Rd to River Rd moves steadily other than the light at Innerarity and Perdido Key Dr. The Traffic slows on Thursday and Saturday traveling southbound on the bridge. Sunday traffic on Innerarity Point Rd slows between Balderas Ave to Perdido Key Dr with heavy church traffic.



The western section of Perdido Key consistently sees traffic slowing at the state line heading eastbound where the lanes reduce from four to two. Traffic slows the most at this location on Friday evening, Saturday afternoon/evening, as well as Sunday corresponding with events at Flora-Bama and the pedestrian crossing to access parking at that location.

Traffic Data

SR 292 (Perdido Key Drive) - 5 Yr. AADT



This chart shows the traffic is variable, and except for the north end, is lower than volume that requires a 4 Lane road.

Traffic Flow In One Lane

A vehicle every 2 seconds (max)

Equals approximately 30 vehicles per minute ($60/2=30$)

Yields 1,800 vehicles per hour ($30 \times 60 = 1,800$)



Traffic Flow at Signals

If green all the time:

- 1,800 vehicles per hour of green time per lane

If green half the time:

- 900 vehicles per hour, per lane

“T” intersections are more efficient



Pedestrian Crossing

Cross access between lots along Perdido Key Drive should be provided as should pedestrian crossings off the Drive. Crossings should be located every 500 to 600 ft in the commercial nodes, then strategically at ½ mile spacings between River Road and north of Johnson Beach Road and ½ to ¾ mile spacings elsewhere.

The County is doing good work with regard to pedestrian crossings and pedestrian safety. This image is taken at the fire station while it was under construction. These are examples of good pedestrian crossing signals.

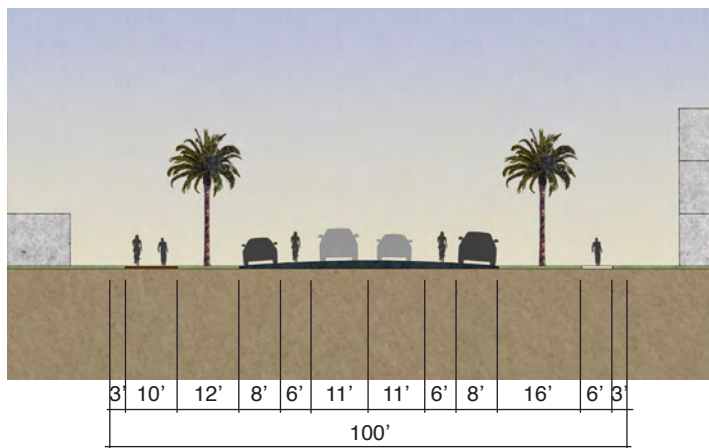
Pedestrian crossing signals

- Rectangular rapid flashing beacons

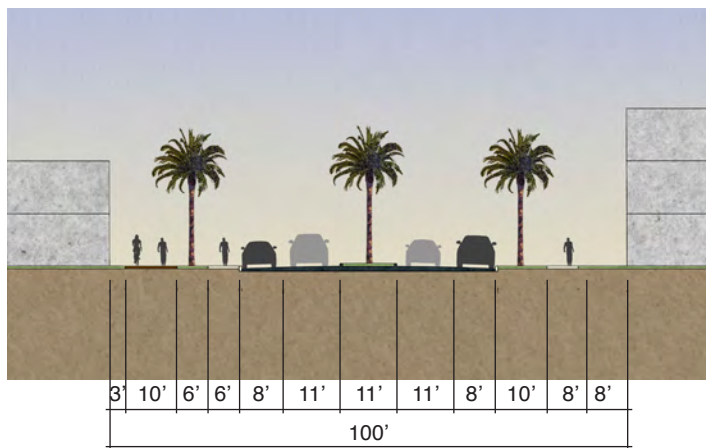


PROPOSED STREET SECTIONS

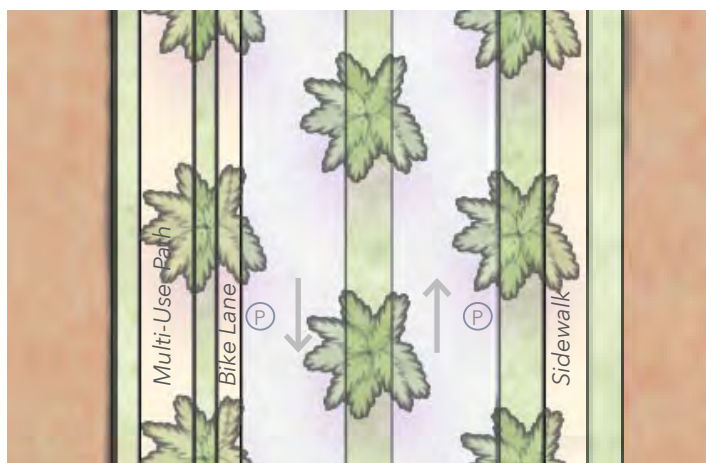
TRANSPORTATION & INFRASTRUCTURE



SUBURBAN



COMPACT URBAN



In line with the practice of designing based on community vision, two lane streets are recommended for Perdido Key Drive south of the Intracoastal Bridge. 'T' intersections are more efficient than 'plus' intersections due to fewer conflicting paths allowing more through traffic green time. Most of the town center scenarios have 'T' intersections. The cross sections above demonstrate the difference between the more common suburban street design and a more compact, urban walkable street. Primarily, the Suburban design is faster, at 35 mph. this requires separate bicycle lanes against the parked cars. Buildings are also set back from the ROW. For the more compact urban sections posted speed is 25mph and added sidewalks are designed for the north (left) side and building setbacks are much less to achieve greater closure for the section. Due to the large ROW, a median can alternate with a safety strip in the center. This compact design is recommended for Perdido Key Drive at each of the Retail Center Options.

To facilitate the walkable designs in Town Centers, the County should adopt designations via zoning that state the function of the streets and the centers as highly walkable.

A compact urban context is the priority for the central section of Perdido Key Drive between River Road and north of Johnson Beach Road. In concert with the PK Town Center Overlay, Perdido Key Drive should be a two lane thoroughfare with walkable design features, particularly in the mixed use centers. This Escambia county policy is fully compatible with the Complete Streets policies adopted by FDOT. Coordination between FDOT and the County should be undertaken to refine the Perdido Key Drive cross section to yield high levels of pedestrian and bicycle mobility, service reasonable future traffic volumes and remain compatible with the Beach Mouse Mitigation Plan.

Future considerations

- Considerations in determining future crossings placement and how they look.
 - Evaluate based on adjacent context conditions and time of installation with respect to other adjacent crossings.
 - Design with assumption that new Mixed Use Centers will have reduced speed limits of 25mph.
 - Consider Rapid Rectangular Flashing Beacons RRFB in transition areas only in higher speed zones, such as the edges of a town center.
 - Install crosswalks without the flashers in the "Perdido Key downtown overlay area".
 - Consider pedestrian crossings of 450 feet that are better for increased walkability, in low speed zones (25 mph).

- Considerations for the timing of future crossings.
 - Consider context - As development emerges, on varying schedules with other land and transportation projects, avoid adding elements such as added paving for acceleration and deceleration lanes, if a new Mixed Use Center is planned in the future. Speed limit reduction changes design dimensions, generally in the reduced direction.
 - Coordinate with FDOT and other agencies when considering paving or major projects in the Mixed Use Centers.

- Encourage shared easements and driveways, especially in the more compact Perdido Key Overlay Area:
 - Locate parking to the side and rear of commercial and residential developments where possible.
 - Design and build interconnecting rear lanes that facilitate crossing between properties without re-entering the arterial, Perdido Key Drive, where possible.

- Maintain Perdido Key Drive as a two lane facility.
 - Mixed Use Centers in the Perdido Key Overlay Area require great walkability, thus requiring the following:
 - a. Short Blocks - keep maximum block perimeter as per Code;
 - b. Two through lanes at crossings; and
 - c. Posted speeds at 25mph.
 - Rural sections of Perdido Key Drive will have higher capacity than other sections, thus two lanes will be sufficient to handle future demand.

INFRASTRUCTURE SERVICES

TRANSPORTATION & INFRASTRUCTURE

GENERAL

The Emerald Coast Utilities Authority (ECUA) supplies both potable water and wastewater services for the study area. ECUA has 32 public water supply wells distributed throughout its service area that pump water from the Sand and Gravel Aquifer. These wells pump more than 35 million gallons per day on average to more than 90,000 customers. ECUA operates three wastewater treatment plants in the County. The Central Water Reclamation Facility has a capacity of 22.5 million gallons per day (MGD); the Bayou Marcus Water Reclamation Facility has a capacity of 8.2 MGD; and the Pensacola Beach Wastewater Treatment Plant has a capacity of 2.4 MGD.

Wastewater from Perdido Key and Innerarity is piped through a gravity and force main system to the Bayou Marcus Plant for treatment and dispersal through a natural wetlands system rated at 10.25 MGD. Plans are to increase plant capacity to the wetlands capacity in the future.



EXISTING POTABLE WATER FACILITIES

Perdido Key and Innerarity receive water from the South Zone of ECUA's system, which incorporates fourteen wells with a combined capacity of 26.94 MGD; four elevated storage tanks with a combined capacity of 2.5 MG; and two ground storage tanks with a combined capacity of 8.25 MG. A 4,000 gallon per minute (gpm) booster station and associated 3 M.G. Ground Storage Tank located near the intersection of Sorrento and Bauer Roads maintains the hydraulic grade line (pressure) on the system. Ten- and twelve-inch water transmission lines run from the booster station along Sorrento Road to the intersection with Innerarity Road. A 12-inch and 8-inch loop along Bauer Road and Gulf Beach Highway to the same intersection increase reliability, pressure and flow rates to Innerarity and to Perdido Key. Twenty-four and twelve inch mains go from the Innerarity intersection under the Intracoastal Waterway and onto Perdido Key. The mains branch at River Road with 8- and 6-inch lines going west along River Road and a 12-inch line extending to Semmes Road where it branches to a 12-inch line to the west to the Perdido Key Elevated Storage Tank of 0.5 MG and a 12-inch line to the south along Perdido Key Drive. Water mains are looped or interconnected along River Road and Semmes Road to Perdido Key Drive for reliability, and to enhance pressure and flow rates. The water main system continues from the intersection of Perdido Key Drive and River Road to the State Line with parallel 8- and 12-inch mains interconnected at intervals to enhance pressure and flow rates. Most of the 8- and 12-inch mains along Perdido Key Drive were constructed in 2005.

A standby 1.0 MG ground storage tank and associated booster station located near the intersection of Innerarity Road and Perdido Key Drive are connected to the water transmission line going to the Key.

Planning

ECUA completed a "20-year Master Plan & Hydraulic Evaluation" of the South Zone Water System in June 2001. The plan included recommendations for infrastructure improvements through year 2020.

A "5-year Potable Water System Master Plan Update" was completed in September 2005. It recommended a new South Zone well at 57th Avenue and Jackson Street, but no improvements in the water transmission and storage facilities on Perdido Key and Innerarity were recommended. The proposed well was not constructed. Another update of the Potable Water System Master Plan is in progress and is expected to be completed soon.

INFRASTRUCTURE SERVICES

TRANSPORTATION & INFRASTRUCTURE

EXISTING WASTEWATER FACILITIES

The wastewater collection and transmission system on Perdido Key consists of a 12-inch PVC force main located on the north and west sides of Perdido Key Drive. This force main traverses the length of the Key from the State line to a 24-inch gravity sewer, thence approximately 500 feet and into the Master Pumping Station #173 at Semmes Road. It serves as the pressure collector for over 60 lift stations that sewer residential and commercial customers along the Key. This relatively old force main is brittle and subject to routine breaks. Most of the lift stations that manifold into the 12-inch main do not have isolation valves, and breaks in the small diameter force mains can result in significant sewage spills.

Lost Key Plantation is served by privately owned and operated gravity and force mains and lift stations that tie into the ECUA 8-inch lines on River Road and into the ECUA Master Pumping Station (LS #173) located near the intersection of Semmes Road and Perdido Key Drive. The Master Station, designed to be expandable to serve Key build out, pumps via a 12-inch force main to the Intracoastal Waterway, thence through a 14-inch polyethylene force main under the Waterway, thence via a 12-inch PVC main along Gulf Beach Highway to Lift Station #381 near the intersection with Bauer Road, thence via a force main north on Bauer Road, thence along Sorrento Road to Lift Station #379 near the Blue Angel intersection, thence to the Bayou Marcus Wastewater Reclamation Plant.

The Johnson Beach area is served by gravity and force mains and lift stations that tie into the 24-inch gravity sewer that flows into LS #173.

There is a \$2.2 million Capital Improvement Project that is nearing 90 percent completion of construction. It consists of 10- and 12-inch gravity sewers that allow phase-out of several obsolete lift stations and extends laterals to both sides of the road for customers to tie into. The project extends from the curve in Perdido Key Drive to just west of the River Road intersection and involves upgrading two lift stations with new pumps.

There are a few septic tanks remaining on the Key, but most have been eliminated.

Planning

A “Southwest Escambia County and Perdido Key Force Main System Study and Hydraulic Analysis” was completed in October of 2001. It contains two options for system improvements through 2020. Updating of that study is under consideration.

EXISTING SOLID WASTE FACILITIES

The Emerald Coast Utilities Authority (ECUA) provides residential collection, and five or six private companies provide collection of solid waste on Perdido Key. ECUA will begin offering commercial collection in 2014.

There are some streets without cul-de-sacs or adequate hammer-heads, which is a problem for collection trucks and residents. Roughly thirty percent of the dumpsters on the Key are roadside, requiring trucks to back into the roads to pick them up. Each problem area should be evaluated to determine the feasibility of acquisition of additional right-of-way and construction of improvements.

Solid waste from the Key is trucked to the Perdido landfill for disposal. The 424 acre landfill is owned and operated by Escambia County and managed by the Division of Solid Waste Management (DSWM) as an Enterprise Fund. In addition to municipal solid waste, the landfill receives special and household hazardous waste, including conditionally exempt, small quantity generator waste. The DSWM also manages waste recycling, landfill mining for compost and methane gas, and education outreach programs.



INFRASTRUCTURE SERVICES

TRANSPORTATION & INFRASTRUCTURE

EXISTING STORMWATER MANAGEMENT REGULATIONS

Storm water is regulated under the Clean Water Act by the Environmental Protection Agency through the Department of Environmental Protection (DEP). Escambia County is regulated under National Pollution Discharge Elimination System (NPDES) Permit Number FLS000019-003 for Municipal Separate Storm Sewer Systems (MS4s) that requires monitoring and annual reporting of all aspects of storm water runoff, including collection, detention/retention, treatment, and discharge. Storm water is also regulated by the Department of Environmental Protection and the Northwest Florida Water Management District (Environmental Reserve Permitting) under 62-341 and 62-346 of the Florida Administrative Code.

The Escambia County Comprehensive Plan and the Land Development Code specifically address storm water management with respect to public facilities and site development.

The level of service associated with drainage is standardized as either acceptable or not acceptable for new development. The acceptable standard is to meet or exceed the performance measures as specified in Comprehensive Plan (Policy 10.C.2.2). Any development can meet or exceed the performance measures with properly engineered, on-site retention. Typically, concurrency can be met without the reliance upon off-site provisions not under the control of the developer.

As shown in the Capital Improvements Program, the County is using Local Option Sales Tax revenue to construct or expand “regional” storm water retention ponds in conformance with the 1994 Master Drainage Plan. Relative to work being performed by the County, as a Drainage Capital Improvement involving retrofits to older existing systems, there is no level of service minimum. The County has prioritized concerns related to drainage and is in the process of correcting as many of the concerns as possible with the current level of funding. The design standards are the same as those for the developer, when practical.

The County Land Development Code, “Article 4 Subdivisions and Site Plans” addresses in article “4.04.13

Drainage Storm water Management” requirements and directs compliance with the Performance Standards in article “7.15.00 Storm water Management.” In general, a Storm water Management Plan must be prepared by a registered professional engineer certifying that the storm water system to be constructed will collect and treat the run-off from a 25-year, critical duration storm. Detention and retention/detention structures without a positive outfall must be constructed to collect all of the run-off from a 100-year, critical duration storm with zero discharge and percolate all of the run-off within 7 days. The performance standards also address sedimentation control requirements. Discharges to Department of Transportation (D.O.T.) drainage systems require connection permits.

Planning

The County is in the process of conducting storm water basin studies county-wide. The Perdido Key Basin study has not been completed, nor is a study scheduled.

Existing Facilities

Storm water management is generally handled on a project by project basis, is typically handled on the site of the project, and typically does not affect adjacent landowners. Because of the sandy soils throughout most of the Key, exfiltration via swales and shallow basins is most commonly used. Roadside and drive swales are common and, where land is a premium, underground and under pavement exfiltration lines are used.

In some locations, such as Lost Key Plantation, wet storm water retention/detention is used. Driveway and roadway culverts are common

Future Considerations

There are several areas that experience temporary flooding during very wet weather. The most significant and frequent flooding occurs along River Road near the Holiday Harbor entrance, due to overflow of the nearby wet detention pond on Lost Key Plantation.

Light Imprint

The Light Imprint (LI) approach to storm water management is rooted in new urbanism and was developed out of a need to coordinate engineering concerns with new urbanist design principles. Light imprint integrates sustainability with community design by making stormwater management more environmentally friendly. More specifically, it is a tool box of techniques to manage stormwater and natural drainage within the rural to urban contexts of compact, walkable, mixed use communities. It complements other more typical land planning approaches, including Low Impact Development (LIDs) and Best Management Practices (BMPs).

The Light Imprint approach should be encouraged to be applied to the Perdido Key Town Center Overlay area. It enables developers to give more consideration to environmental factors without compromising design. LI respects a site's climate, soil hydrology, topography, and it recognizes the importance of public spaces and connectivity by offering a set of contextually appropriate design solutions. Additionally, LI offers a range of environmental strategies for different landscape and urban conditions. LI's tool set addresses stormwater runoff through a combination of natural drainage, conventional engineering infrastructure and innovative infiltration practices. It has the possibility of significantly lowering construction and engineering costs. LI's tool box matrix is divided into four categories for managing water: paving solutions, channeling solutions, storage solutions and filtration solutions.

More specifically, best management practices (BMP's) are defined in the current Northwest Florida Water Management District Drainage Manual. Specific drainage basin studies can be used to provide estimates of long-term cumulative efficiencies for several types of BMPs, according to their sizing. General guidelines can be developed for individual sites that support an overall intent for the region with respect to pollutant removal performance, protection of wet-

lands, and runoff attenuation. The U.S. Environmental Protection Agency's (EPA's) Storm Water Management Model (SWMM) and hydrologic modeling tools can be employed for generating and simulating BMP's with varying resolution.

Common types of stormwater BMPs include:

- surface infiltration practices (e.g., infiltration basins)
- subsurface infiltration systems (e.g., infiltration trenches)
- gravel wetland systems
- bioinfiltration systems
- water quality swales
- porous pavement systems
- wet ponds
- extended dry detention ponds
- underground treatment and retention

Long-term cumulative performance will vary for each BMP, but guidelines and an overall stormwater master plan can be developed based on land use, impervious limits, and water quality constituents.

Without intensive calibration to context, and a recognition that urban environments should be treated differently to suburban development, so far as to not prevent or constrain sustainable development. Many of their more typical standards and practices involve a lot-based, rather than a block or neighborhood-based solution. Instead, if Escambia County wants to enhance Perdido Key both aesthetically and environmentally, it should promote and advocate for LI strategies and framework to be applied holistically throughout the Perdido Key Overlay area.

INFRASTRUCTURE COST ESTIMATES

TRANSPORTATION & INFRASTRUCTURE

ASSUMPTIONS & PROCEDURES

River Road was chosen as the representative Town Center because its mix of all the infrastructure elements being estimated. Approximate areas of streets, sidewalks, parking areas, and building footprints were determined to get an idea of overall impervious coverage. An estimate regarding what portions of that impervious would likely be asphalt, concrete, or building was determined and entered into the current Escambia County Pricing Agreement to estimate construction costs.

Using these approximate values for impervious coverage, a weighted runoff coefficient and time of concentration for the site was calculated and used in a basic stormwater model to estimate a plausible retention volume. It was assumed that all stormwater management will be above ground storage ponds. This assumption was made based on a seasonal high water table that will most likely be adverse to underground stormwater retention.

For utilities, sanitary sewer, water, and gas were drawn on the aerial photos and measured by our CAD technicians in AutoCAD. It was found that a ballpark estimate for these three could be reduced to a function of total street length.

These assumptions were verified on other town centers. Each subsequent town center was estimated using the relationships between sewer/water/gas and street length. All quantities that were estimated were entered into the Escambia County Pricing Agreement (GPAD_PD 14-15.064) for an estimate of cost. Since the Pricing Agreement contained unit cost information from multiple contractors, the minimum, average, and maximum prices were shown in the infrastructure estimate.

Specifically, the following procedure was used in preparing rough construction cost estimates for the Town Centers:

1. The sketches of the Town Centers on aerial photographs were imported into AutoCAD and plotted to scale for use in estimating quantities of infrastructure components for costing. The Villages Town Center was used as the template.
2. Lines for sewer, gas, and water were mapped out on the scaled aerial photos.
3. Areas were delineated showing regions of asphalt parking, asphalt roadways, concrete sidewalks, building footprints, residential parcels (estimating 70% impervious for stormwater), and pond locations.
4. Manholes, fire hydrants, lift stations, driveways to all parcels, water and sewer connections to all parcels, and thermoplastic striping were placed. Quantities of each were calculated.
5. Accommodations were made for road paving, parking lot paving, seeding of grassed areas, excavation and shaping of ponds, and possible connections between treatment ponds and retention areas.
6. Specific quantities were entered into the Escambia County Unit Pricing Agreement, representing the bids of ten contractors. A closer look at the unit prices indicated that some items were uncharacteristically high, leading us to rule out what we determined were unrealistic unit prices.
7. The proposed cost of each remaining Town Center was scaled according to total area for stormwater and according to the length of streets for utilities.
8. The average total infrastructure cost for each Town Center was increased by 30% to allow for approximate preliminary design procedures used in this analysis.
9. The construction cost estimates do not include electrical distribution, communication infrastructure, irrigation systems, landscaping, street lights, traffic controls, required filling material, and decorative pavement. Non-construction costs such as legal, engineering, permitting etc. are not included.

INFRASTRUCTURE COST ESTIMATES

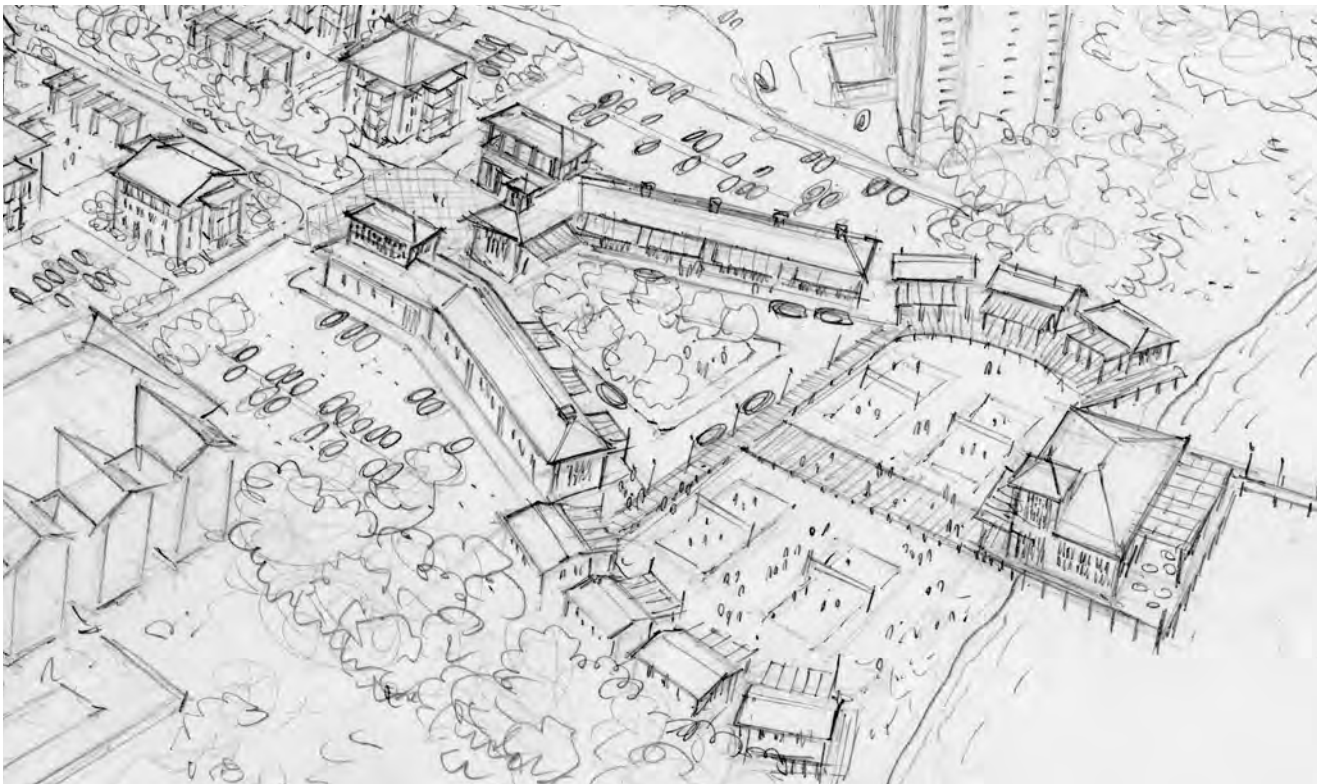
TRANSPORTATION & INFRASTRUCTURE

BREAKDOWN BY PLAN & MATERIAL

Cost (x \$1,000)	Streets (asphalt)		Additional Asphalt		Concrete Areas		Sanitary Sewer	
	Plans	Min	Max	Min	Max	Min	Max	Min
Triangle	\$100.95	\$192.66	\$25.00	\$76.71	\$82.39	\$162.88	\$54.06	\$104.90
Square-A-Bout (low)	\$51.43	\$98.16	\$12.74	\$39.08	\$41.98	\$82.99	\$28.73	\$55.31
Square-A-Bout (high)	\$71.42	\$136.30	\$17.69	\$54.27	\$58.29	\$115.24	\$42.90	\$81.56
Oval West	\$184.68	\$352.46	\$45.74	\$140.33	\$150.73	\$297.99	\$77.63	\$158.31
Village Center	\$599.04	\$1,143.23	\$148.35	\$455.18	\$488.90	\$966.55	\$328.19	\$634.13
Grand Villagio	\$167.63	\$319.91	\$41.51	\$127.37	\$136.81	\$270.47	\$81.38	\$160.93
Cocina Village	\$69.29	\$132.24	\$17.16	\$52.65	\$56.55	\$111.80	\$39.45	\$75.70
River Rd Boardwalk	\$152.17	\$290.41	\$37.69	\$115.63	\$124.19	\$245.53	\$65.63	\$133.07
Innerarity Heights	\$708.46	\$1,352.06	\$175.45	\$538.33	\$578.20	\$1,143.11	\$324.78	\$649.93
Flora-Bama	\$363.77	\$694.24	\$90.09	\$276.41	\$296.89	\$586.95	\$162.23	\$326.55

cont'd	Water		Gas		Stormwater (ponds)		Totals	
	Plans	Min	Max	Min	Max	Min	Max	Min
Triangle	\$41.67	\$117.43	\$31.25	\$88.07	\$162.19	\$296.88	\$497.50	\$1,039.52
Square-A-Bout (low)	\$21.23	\$59.83	\$15.92	\$44.87	\$99.44	\$179.74	\$271.47	\$559.99
Square-A-Bout (high)	\$29.48	\$83.08	\$22.11	\$62.31	\$154.44	\$284.70	\$396.33	\$817.46
Oval West	\$76.23	\$214.83	\$57.17	\$161.12	\$183.17	\$331.31	\$775.34	\$1,656.36
Village Center	\$247.26	\$696.82	\$185.44	\$522.61	\$889.69	\$1,668.06	\$2,886.87	\$6,086.58
Grand Villagio	\$69.19	\$194.99	\$51.89	\$146.24	\$213.45	\$391.23	\$761.86	\$1,611.14
Cocina Village	\$28.60	\$80.60	\$21.45	\$60.45	\$132.10	\$241.85	\$364.60	\$755.28
River Rd Boardwalk	\$62.81	\$177.01	\$47.11	\$132.76	\$169.29	\$306.64	\$658.88	\$1,401.05
Innerarity Heights	\$292.42	\$824.10	\$219.32	\$618.08	\$744.84	\$1,377.91	\$3,043.48	\$6,503.52
Flora-Bama	\$150.15	\$423.15	\$112.61	\$317.36	\$371.61	\$682.00	\$1,547.35	\$3,306.66

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RETAIL ANALYSIS

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Figure 1: The Perdido Key study area, shown above, can presently support an additional 83,400 sf of retail and restaurant development.

Executive Summary

This study finds that the Perdido Key study area has an existing demand for up to 83,400 square feet (sf) of new retail development producing up to \$26.3 million in sales. By 2020, this demand could generate up to \$28.2 million in gross sales. This new retail demand could be absorbed by existing businesses and/or with the opening of 30 to 40 new stores and restaurants.

Please find below a summary of the supportable retail:

15,900	sf	Full-Service Restaurants
10,500	sf	Limited-Service Restaurants
9,200	sf	Pharmacy
7,900	sf	Apparel & Shoe Stores
7,800	sf	Grocery & Specialty Food Stores
6,200	sf	Special Food Services
4,100	sf	Hardware & Garden Supply Stores
3,500	sf	Bars, Breweries & Pubs
2,900	sf	Furniture & Home Furnishings Stores
2,800	sf	General Merchandise Stores
2,500	sf	Miscellaneous Store Retailers
2,400	sf	Gift Stores
2,300	sf	Electronics & Appliance Stores
2,200	sf	Jewelry Stores
1,800	sf	Department Store Merchandise
1,400	sf	Sporting Goods & Hobby Stores
83,400	sf	Total

EXECUTIVE SUMMARY

RETAIL ANALYSIS

If constructed as a new single-site center, the development would be classified as a small lifestyle type shopping center by industry definitions and could include 3-4 apparel stores; 3-4 full service restaurants; 3-4 limited-service eating places; 3-4 special food services; 2-3 general merchandise stores; 2-3 gift stores; a pharmacy; a small grocery store; a hardware store; and an assortment of other retail and restaurant offerings.

TRADE AREA BOUNDARIES

Based on GPG's site evaluation, the existing retail hubs, population clusters, highway access, and the retail gravitation in the market, as well as our experience defining trade areas for similar communities throughout the United States, it was determined that consumers in the primary trade area generate demand to support a variety of retailers. This potential will continue to increase over the next five years, sustained by an annual population growth rate of 0.77 percent and average household income growth of 2.84 percent.

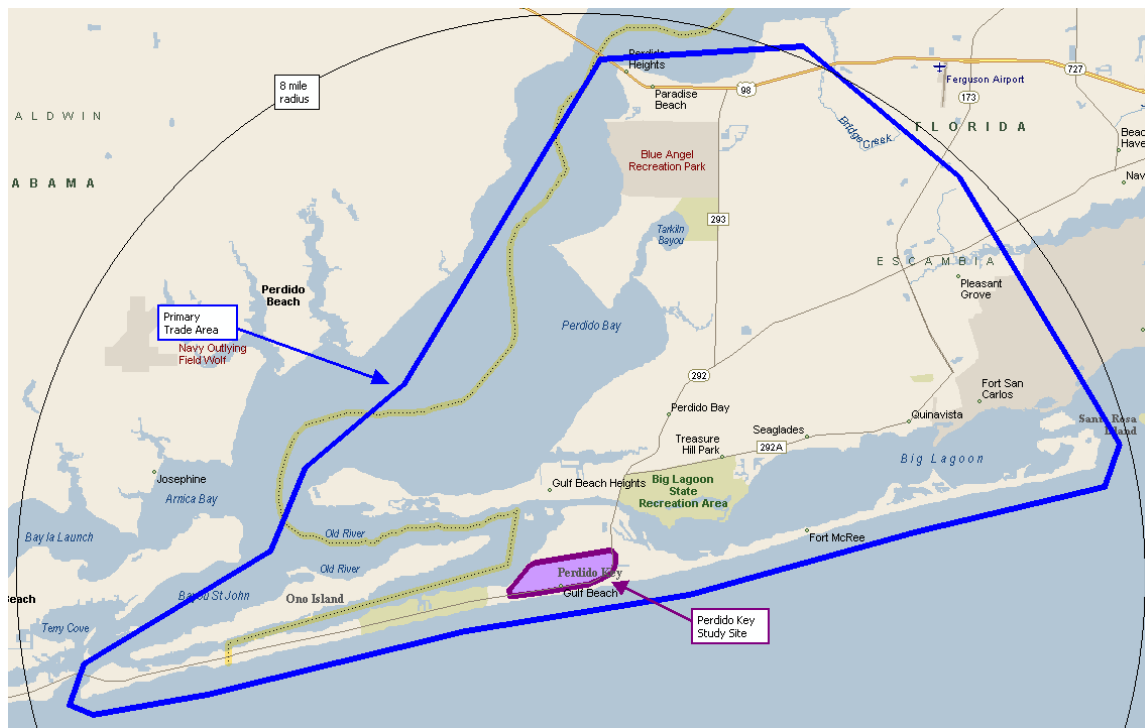


Figure 2: Perdido Key has an approximate 66-square-mile primary trade area (shown above in blue).

The primary trade area is the consumer market where the study area has a significant competitive advantage because of access, design, lack of quality competition and traffic and commute patterns. GPG defined a primary trade area by topography, vehicular access, strength of retail competition and residential growth patterns instead of standardized “drive-times.” Consumers inside the primary trade area will account for up to 40 to 50 percent of the total sales captured by retailers in the Perdido Key study area.

This study estimates that the Perdido Key study area has an approximate 66-square-mile trade area, limited by Dog Track Road to the East, the Gulf of Mexico to the South, Perdido Pass to the West, and Perdido Bay to the North. The boundaries roughly equate to an 8-mile radius or a 12-minute drive time.

TRADE AREA DEMOGRAPHICS

The study site’s primary trade area includes 22,700 people, which is expected to increase at an annual rate of 0.77 percent to 23,500 by 2020. The current 2015 households number is 9,100, increasing slightly to 9,500 by 2020 at an annual rate of 0.86 percent. Both population and household growth trends are slightly outpaced by the overall growth expected in the state. The primary trade area’s 2015 average household income is \$74,600 and is estimated to increase to \$84,000 by 2020. Median household income in the primary trade area in 2015 is \$58,200 and estimated to increase to \$67,000 by 2020. Moreover, 38.8 percent of the households earn above \$75,000 per year. Income levels in the primary trade area are notably higher than region and state figures. The average household size of 2.47 persons in 2015 is expected to remain nearly the same through 2020; the 2015 median age is 39.3 years old.

Table 1: Trade Area Demographic Characteristics

<i>Demographic Characteristic</i>	<i>Primary Trade Area</i>	<i>Pensacola MSA</i>	<i>Florida</i>
2015 Population	22,700	467,900	19,603,900
2020 Population	23,500	488,300	20,654,200
2015-20 Projected Annual Growth Rate	0.77%	0.86%	1.05%
2015 Households	9,100	180,400	7,718,700
2020 Households	9,500	189,100	8,130,900
2015-20 Projected Annual HH Growth Rate	0.86%	0.94%	1.05%
Persons Per Household 2015	2.47	2.45	2.48
Median Age	39.3	38.7	41.9
2015 Median Household Income	\$58,200	\$48,600	\$47,300
2015 Average Household Income	\$74,600	\$62,900	\$66,700
2020 Median Household Income	\$67,000	\$55,300	\$54,500
2020 Average Household Income	\$84,000	\$71,000	\$75,700
% Households w. incomes \$75,000+	38.8%	29.5%	29.4%
% Bachelor’s Degree	25.4%	17.0%	17.9%
% Graduate or Professional Degree	11.6%	8.7%	9.8%

Table 1: Key demographic characteristics of the study area’s primary trade area, the Pensacola Metropolitan Statistical Area and the State of Florida.

The primary trade area demonstrates an expanding housing market characteristic of a warm-climate vacation destination. Approximately 57.9 percent of the primary trade area’s 15,700 housing units are occupied year-round and the median home value is estimated to be \$191,300. Of all households, 37.1 percent are owner-occupied, and that number that is expected to grow to 37.3 percent by 2020. Renter-occupied households have increased from 18.4 percent in 2010 to 20.8 percent in 2015, and this statistic is projected to continue to grow to 20.9 percent by 2020. The vacancy rate is projected to correspondingly decrease from 42.1 percent in 2015 to 41.8

TRADE AREA DEMOGRAPHICS





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percent in 2020. Of the trade area’s 6,600 vacant households, 4,100 are occupied seasonally by “snowbirds” and other recreational visitors. Taking this into consideration, the seasonally adjusted vacancy rate within the primary trade could be as low as 8.4 percent. The percentage of housing units valued at over \$250,000 is expected to increase from 30.4 percent to 42.9 percent - coinciding with an increase in the median home value to \$232,100 by 2020.

TAPESTRY LIFESTYLES

Esri has developed Tapestry Lifestyles, which is an attempt to create 65 classifications, or lifestyle segments, that help determine purchasing patterns. These segments are broken down to the U.S. Census Block Group level and used by many national retailers to help determine future potential locations. The following Table 3 details the top Tapestry Lifestyles found in the primary trade area.

Table 3: Tapestry Lifestyles

Lifestyle	Trade Area Statistics	Short Description
  <p>Soccer Moms</p>	<p>Population 3,900</p> <p>Households 1,400</p> <p>Median HH Income \$84,000</p> <p>15.9% Primary Trade Area Households Market Share</p> <p>2.8% National Market Share</p>	<p><i>Soccer Moms</i> is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers.</p> <p>Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.</p> <p>Most households own at least 2 vehicles; the most popular types are minivans and SUVs. Family-oriented purchases and activities dominate, like 4+ televisions, movie purchases or rentals, children’s apparel and toys, and visits to theme parks or zoos. Outdoor activities and sports are characteristic of life in the suburban periphery, like bicycling, jogging, golfing, boating, and target shooting. Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like riding mowers and tillers.</p>
  <p>Silver and Gold</p>	<p>Population 2,300</p> <p>Households 1,100</p> <p>Median HH Income \$63,000</p> <p>12.4% Primary Trade Area Households Market Share</p> <p>0.8% National Market Share</p>	<p>The <i>Silver and Gold</i> lifestyle is the second oldest senior market that consists of mostly married couples with no children. They are primarily retired, well-educated seniors that prefer technology such as a tablet to a smartphone.</p> <p><i>Silver and Gold</i> has the resources, stamina, and free time to enjoy the good life. They are individuals who live a healthier lifestyle and maintain a regular exercise regimen. Healthier eating habits are important and vital in order to live a better life. They enjoy having the luxuries of a well-funded retirement that allow them to spend time with hobbies, travel, and sports. Golfing and boating are favorites amongst this group.</p> <p>They prefer luxury cars or SUVs, but they represent the highest demand market for convertibles. The <i>Silver and Gold</i> lifestyle consists of avid readers and they are big supporters of charitable organizations.</p>

Lifestyle	Trade Area Statistics	Short Description
  <p>In Style</p>	<p>Population 2,900</p> <p>Households 1,100</p> <p>Median HH Income \$66,000</p> <p>12.2% Primary Trade Area Households Market Share</p> <p>2.3% National Households Market Share</p>	<p><i>In Style</i> denizens embrace an urbane lifestyle that includes support of the arts, travel, and extensive reading. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for their retirement.</p> <p>Median household income reveals an affluent market with income supplemented by investments and a substantial net worth. Connected and knowledgeable, they carry smartphones and use many of the features. Attentive to price, they use coupons, especially mobile coupons. Homes are an integral part of their style; they invest in home remodeling/ maintenance. Prefer organic foods, including growing their own vegetables. Financially active, from a variety of investments to home equity lines of credit. Meticulous planners, both well insured and well invested in retirement savings. Generous with support of various charities and causes.</p>
  <p>Bright Young Professionals</p>	<p>Population 2,700</p> <p>Households 1,000</p> <p>Median HH Income \$50,000</p> <p>11.0% Primary Trade Area Households Market Share</p> <p>2.2% National Households Market Share</p>	<p><i>Bright Young Professionals</i> is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. One out of three householders is under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes; over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work.. Residents of this segment are physically active and up on the latest technology.</p> <p>Owning newer computers and TVs they go online to do banking, access YouTube or Facebook, and play games. Use cell phones to text, redeem mobile coupons, listen to music, and check for news and financial information. Find leisure going to bars/clubs, attending concerts, and renting DVDs from Redbox or Netflix. Read sports magazines and participate in a variety of sports, including backpacking, basketball, football, bowling, Pilates, weight lifting, and yoga. Dine out often.</p>
  <p>Midlife Constants</p>	<p>Population 2,500</p> <p>Households 1,000</p> <p>Median HH Income \$48,000</p> <p>10.8% Primary Trade Area Households Market Share</p> <p>2.5% National Households Market Share</p>	<p><i>Midlife Constants</i> consist of soon-to-be retiring individuals who have below average labor force participation but higher average net worth. Their lifestyle tends to be more country than urban. These are primarily married couples with a growing number of singles.</p> <p>Traditional and not trendy describes the spending habits of this group. They are more interested in convenience than cutting-edge. Technology is accepted as long as it is simple and does not come with a lot of gadgets. American made quality items are preferred, but price is also a large factor.</p> <p>Domestic SUVs and trucks are the vehicles of choice. These vehicles allow for the DIY mentality amongst this group. <i>Midlife Constants</i> like to spend free time scrapbooking, watching movies at home, reading, fishing, and playing golf.</p>

Table 3: The top five Tapestry Lifestyle groups profiled above portray midlife households with above average incomes.

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TOURISM & SEASONAL RESIDENTS

Information provided by the Perdido Key Chamber of Commerce finds that the study area hosted 216,000 visitors in 2014. Of the total, an estimated 175,400 were overnight guests staying an average of 8.2 nights per trip; the average party size is 3.4 persons and the average party spends \$1,895 per trip. The top 10 visitor origins include: Mobile, AL; New Orleans, LA; Baton Rouge, LA; Lafayette, LA; Tallahassee, FL; Dallas, TX; Birmingham, AL; Atlanta, GA; Nashville, TN; and Cincinnati, OH. This study estimates that tourism to Perdido Key could generate as much as \$80.8 million in retail and restaurant demand.

Additionally, housing data collected from the U.S. Census reports that over 4,100 primary trade area households are used seasonal or recreationally. This could boost the trade area's population by as many as 10,000 people during the winter months and have a significant impact on retail sales. While seasonal residents do not spend as much as tourists, GPG estimates that these seasonal households could generate an additional \$25.5 million in retail and restaurant demand.

Table 2: 2015 & 2020 Supportable Retail Table

Retail Category	Estimated Supportable SF	2015 Sales/SF	2015 Estimated Retail Sales	2020 Sales/SF	2020 Estimated Retail Sales	No. of Stores
Retailers						
Apparel Stores	6,190	\$290	\$1,795,100	\$310	\$1,918,900	3 - 4
Book & Music Stores	590	\$250	\$147,500	\$270	\$159,300	1
Department Store Merchandise	1,770	\$330	\$584,100	\$355	\$628,350	1
Electronics & Appliance Stores	2,310	\$325	\$750,750	\$350	\$808,500	1 - 2
Florists	420	\$225	\$94,500	\$240	\$100,800	1
Furniture Stores	1,020	\$275	\$280,500	\$295	\$300,900	1
General Merchandise Stores	2,810	\$335	\$941,350	\$345	\$969,450	2 - 3
Gift Stores	2,440	\$265	\$646,600	\$285	\$695,400	2 - 3
Grocery Stores	5,860	\$335	\$1,963,100	\$360	\$2,109,600	1
Hardware	3,590	\$250	\$897,500	\$270	\$969,300	1
Home Furnishings Stores	1,850	\$280	\$518,000	\$300	\$555,000	1
Jewelry Stores	2,190	\$305	\$667,950	\$330	\$722,700	1 - 2
Lawn & Garden Supply Stores	490	\$225	\$110,250	\$240	\$117,600	1
Miscellaneous Store Retailers	1,490	\$275	\$409,750	\$295	\$439,550	1
Pharmacy	9,160	\$295	\$2,702,200	\$315	\$2,885,400	1 - 2
Shoe Stores	1,690	\$285	\$481,650	\$306	\$517,140	1
Specialty Food Stores	1,980	\$275	\$544,500	\$295	\$584,100	1
Sporting Goods & Hobby Stores	1,430	\$270	\$386,100	\$290	\$414,700	1
Retailer Totals	47,280	\$283	\$13,921,400	\$303	\$14,896,690	20 - 26
Restaurants						
Bars, Breweries & Pubs	3,490	\$335	\$1,169,150	\$360	\$1,256,400	1 - 2
Full-Service Restaurants	15,900	\$355	\$5,644,500	\$380	\$6,042,000	3 - 4
Limited-Service Eating Places	10,570	\$345	\$3,646,650	\$370	\$3,910,900	3 - 4
Special Food Services	6,190	\$315	\$1,949,850	\$340	\$2,104,600	3 - 4
Restaurant Totals	36,150	\$338	\$12,410,150	\$363	\$13,313,900	10 - 14
Retailer & Restaurant Totals	83,430	\$293	\$26,331,550	\$314	\$28,210,590	30 - 40

Table 2: The study site's primary trade area has demand for roughly 83,400 sf of new retail and restaurants.

METHODOLOGY

To address the above issues, GPG defined a trade area that would serve the retail in the study area based on geographic and topographic considerations, traffic access/flow in the area, relative retail strengths and weaknesses of the competition, concentrations of daytime employment and the retail gravitation in the market, as well as our experience defining trade areas for similar markets. Population, consumer expenditure and demographic characteristics of trade area residents were collected using census tracts from the U.S. Bureau of the Census, U.S. Bureau of Labor Statistics and Esri (Environmental Systems Research Institute).

Finally, based on the projected consumer expenditure capture (demand) in the primary trade area of the gross consumer expenditure by retail category, less the current existing retail sales (supply) by retail category, GPG projects the potential net consumer expenditure (gap) available to support existing and new development. The projected net consumer expenditure capture is based on household expenditure and demographic characteristics of the primary trade area, existing and planned retail competition, traffic and retail gravitational patterns and GPG's qualitative assessment of the Perdido Key study area.

Net potential captured consumer expenditure (gap) is equated to potential retail development square footage, with the help of retail sales per square foot data provided by Dollars and Cents of Shopping Centers (Urban Land Institute and International Council of Shopping Centers), qualitatively adjusted to fit the urbanism and demographics of the study area.

ASSUMPTIONS

The projections of this study are based on the following assumptions:

- No other major retail centers are planned or proposed at this time and, as such, no other retail is assumed in our sales forecasts.
- No other major retail will be developed within the trade area of the subject site.
- The region's economy will stabilize at normal or above normal ranges of employment, inflation, retail demand and growth.
- The new retail development will be planned, designed, built, leased and managed as a walkable town center, to the best shopping center industry practices of the American Planning Association, Congress for New Urbanism, the International Council of Shopping Centers and Urban Land Institute.
- Parking for the area is assumed adequate for the proposed uses, with easy access to the retailers in the development.
- Visibility of the shopping center or retail is assumed to meet industry standards, with signage as required to assure good visibility of the retailers.

LIMITS OF STUDY

The findings of this study represent GPG's best estimates for the amounts and types of retail tenants that should be supportable in the Perdido Key primary trade area by 2020. Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and are believed to be reliable. It should be noted that the findings of this study are based upon generally accepted market research and business standards. It is possible that the study site's surrounding area could support lower or higher quantities of retailers and restaurants yielding lower or higher sales revenues than indicated by

TRADE AREA DEMOGRAPHICS

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this study, depending on numerous factors including respective business practices and the management and design of the study area.

This study is based on estimates, assumptions and other information developed by GPG as an independent third party research effort with general knowledge of the retail industry, and consultations with the client and its representatives. This report is based on information that was current as of October 1, 2015, and GPG has not undertaken any update of its research effort since such date.

This report may contain prospective financial information, estimates, or opinions that represent GPG's view of reasonable expectations at a particular time. Such information, estimates, or opinions are not offered as predictions or assurances that a particular level of income or profit will be achieved, that particular events will occur, or that a particular price will be offered or accepted. Actual results achieved during the period covered by our market analysis may vary from those described in our report, and the variations may be material. Therefore, no warranty or representation is made by GPG that any of the projected values or results contained in this study will be achieved.

This study *should not* be the sole basis for designing, financing, planning, and programming any business, real estate development, or public planning policy. This study is intended only for the use of the client and is void for other site locations, developers, or organizations.

- *End of Study* -

Community Profile

Perdido Key Primary Trade Area
Area: 66.24 square miles

Prepared by Esri
Latitude: 30.33719647
Longitude: -87.4173250

Population Summary	
2000 Total Population	18,327
2010 Total Population	21,942
2015 Total Population	22,651
2015 Group Quarters	0
2020 Total Population	23,540
2015-2020 Annual Rate	0.77%
Household Summary	
2000 Households	7,109
2000 Average Household Size	2.56
2010 Households	8,751
2010 Average Household Size	2.51
2015 Households	9,116
2015 Average Household Size	2.48
2020 Households	9,515
2020 Average Household Size	2.47
2015-2020 Annual Rate	0.86%
2010 Families	6,127
2010 Average Family Size	2.95
2015 Families	6,334
2015 Average Family Size	2.94
2020 Families	6,580
2020 Average Family Size	2.93
2015-2020 Annual Rate	0.76%
Housing Unit Summary	
2000 Housing Units	10,773
Owner Occupied Housing Units	48.1%
Renter Occupied Housing Units	17.9%
Vacant Housing Units	34.0%
2010 Housing Units	15,086
Owner Occupied Housing Units	39.6%
Renter Occupied Housing Units	18.4%
Vacant Housing Units	42.0%
2015 Housing Units	15,751
Owner Occupied Housing Units	37.1%
Renter Occupied Housing Units	20.8%
Vacant Housing Units	42.1%
2020 Housing Units	16,344
Owner Occupied Housing Units	37.3%
Renter Occupied Housing Units	20.9%
Vacant Housing Units	41.8%
Median Household Income	
2015	\$58,228
2020	\$66,979
Median Home Value	
2015	\$191,344
2020	\$232,131
Per Capita Income	
2015	\$29,976
2020	\$33,869
Median Age	
2010	38.4
2015	39.3
2020	40.0

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

COMMUNITY PROFILE

RETAIL ANALYSIS

Gibbs Planning Group

Community Profile

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Area: 66.24 square miles

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Longitude: -87.4173250

2015 Households by Income	
Household Income Base	9,116
<\$15,000	7.6%
\$15,000 - \$24,999	8.9%
\$25,000 - \$34,999	8.6%
\$35,000 - \$49,999	16.7%
\$50,000 - \$74,999	19.4%
\$75,000 - \$99,999	16.0%
\$100,000 - \$149,999	15.0%
\$150,000 - \$199,999	4.7%
\$200,000+	3.1%
Average Household Income	\$74,641
2020 Households by Income	
Household Income Base	9,515
<\$15,000	6.5%
\$15,000 - \$24,999	5.9%
\$25,000 - \$34,999	6.3%
\$35,000 - \$49,999	15.2%
\$50,000 - \$74,999	21.2%
\$75,000 - \$99,999	19.6%
\$100,000 - \$149,999	15.9%
\$150,000 - \$199,999	5.8%
\$200,000+	3.6%
Average Household Income	\$83,980
2015 Owner Occupied Housing Units by Value	
Total	5,847
<\$50,000	2.4%
\$50,000 - \$99,999	7.6%
\$100,000 - \$149,999	18.4%
\$150,000 - \$199,999	26.1%
\$200,000 - \$249,999	15.1%
\$250,000 - \$299,999	9.9%
\$300,000 - \$399,999	9.4%
\$400,000 - \$499,999	4.1%
\$500,000 - \$749,999	3.9%
\$750,000 - \$999,999	1.4%
\$1,000,000 +	1.7%
Average Home Value	\$244,789
2020 Owner Occupied Housing Units by Value	
Total	6,100
<\$50,000	1.0%
\$50,000 - \$99,999	3.3%
\$100,000 - \$149,999	9.4%
\$150,000 - \$199,999	23.6%
\$200,000 - \$249,999	19.8%
\$250,000 - \$299,999	13.8%
\$300,000 - \$399,999	11.8%
\$400,000 - \$499,999	6.5%
\$500,000 - \$749,999	6.0%
\$750,000 - \$999,999	2.5%
\$1,000,000 +	2.3%
Average Home Value	\$297,258

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

2010 Population by Age	
Total	21,944
0 - 4	6.6%
5 - 9	6.6%
10 - 14	6.9%
15 - 24	12.6%
25 - 34	13.1%
35 - 44	12.7%
45 - 54	15.2%
55 - 64	13.0%
65 - 74	8.3%
75 - 84	3.8%
85 +	1.1%
18 +	76.0%
2015 Population by Age	
Total	22,650
0 - 4	6.1%
5 - 9	6.4%
10 - 14	6.4%
15 - 24	12.5%
25 - 34	13.5%
35 - 44	11.9%
45 - 54	13.8%
55 - 64	13.7%
65 - 74	10.3%
75 - 84	4.0%
85 +	1.3%
18 +	77.5%
2020 Population by Age	
Total	23,540
0 - 4	5.9%
5 - 9	6.0%
10 - 14	6.5%
15 - 24	11.7%
25 - 34	13.0%
35 - 44	12.8%
45 - 54	12.0%
55 - 64	14.2%
65 - 74	11.4%
75 - 84	5.1%
85 +	1.4%
18 +	78.2%
2010 Population by Sex	
Males	11,013
Females	10,929
2015 Population by Sex	
Males	11,353
Females	11,298
2020 Population by Sex	
Males	11,778
Females	11,762

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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RETAIL ANALYSIS

Gibbs Planning Group

Community Profile

Perdido Key Primary Trade Area
Area: 66.24 square miles

Prepared by Esri
Latitude: 30,33719647
Longitude: -87,4173250

2010 Population by Race/Ethnicity	
Total	21,943
White Alone	81.2%
Black Alone	9.2%
American Indian Alone	0.8%
Asian Alone	3.1%
Pacific Islander Alone	0.2%
Some Other Race Alone	1.3%
Two or More Races	4.2%
Hispanic Origin	5.7%
Diversity Index	40.4
2015 Population by Race/Ethnicity	
Total	22,650
White Alone	80.4%
Black Alone	9.0%
American Indian Alone	0.8%
Asian Alone	3.4%
Pacific Islander Alone	0.2%
Some Other Race Alone	1.5%
Two or More Races	4.6%
Hispanic Origin	6.8%
Diversity Index	42.7
2020 Population by Race/Ethnicity	
Total	23,540
White Alone	79.5%
Black Alone	8.8%
American Indian Alone	0.8%
Asian Alone	3.7%
Pacific Islander Alone	0.3%
Some Other Race Alone	1.7%
Two or More Races	5.2%
Hispanic Origin	8.2%
Diversity Index	45.5
2010 Population by Relationship and Household Type	
Total	21,942
In Households	100.0%
In Family Households	84.2%
Householder	27.9%
Spouse	22.2%
Child	29.6%
Other relative	2.7%
Nonrelative	1.8%
In Nonfamily Households	15.8%
In Group Quarters	0.0%
Institutionalized Population	0.0%
Noninstitutionalized Population	0.0%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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Hispanic Origin	5.7%
Diversity Index	40.4
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Nonrelative	1.8%
In Nonfamily Households	15.8%
In Group Quarters	0.0%
Institutionalized Population	0.0%
Noninstitutionalized Population	0.0%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

COMMUNITY PROFILE

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Gibbs Planning Group

Community Profile

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2010 Households by Type	
Total	8,751
Households with 1 Person	22.2%
Households with 2+ People	77.8%
Family Households	70.0%
Husband-wife Families	55.9%
With Related Children	23.3%
Other Family (No Spouse Present)	14.1%
Other Family with Male Householder	3.9%
With Related Children	2.4%
Other Family with Female Householder	10.2%
With Related Children	7.0%
Nonfamily Households	7.8%
All Households with Children	33.2%
Multigenerational Households	3.1%
Unmarried Partner Households	5.7%
Male-female	4.8%
Same-sex	0.9%
2010 Households by Size	
Total	8,752
1 Person Household	22.2%
2 Person Household	38.7%
3 Person Household	17.1%
4 Person Household	13.7%
5 Person Household	5.7%
6 Person Household	1.8%
7 + Person Household	0.9%
2010 Households by Tenure and Mortgage Status	
Total	8,751
Owner Occupied	68.3%
Owned with a Mortgage/Loan	50.3%
Owned Free and Clear	18.0%
Renter Occupied	31.7%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

Perdido Key Primary Trade Area
Area: 66.24 square miles

Prepared by Esri
Latitude: 30.33719647
Longitude: -87.4173250

Data for all businesses in area

Total Businesses:	669
Total Employees:	4,693
Total Residential Population:	22,651
Employee/Residential Population Ratio:	0.21:1

by SIC Codes	Number		Percent		Employees	
	Number	Percent	Number	Percent	Number	Percent
Agriculture & Mining	20	3.0%	43	0.9%		
Construction	52	7.8%	184	3.9%		
Manufacturing	14	2.1%	68	1.4%		
Transportation	27	4.0%	117	2.5%		
Communication	4	0.6%	24	0.5%		
Utility	3	0.4%	6	0.1%		
Wholesale Trade	11	1.6%	39	0.8%		
Retail Trade Summary	148	22.1%	1,867	39.8%		
Home Improvement	7	1.0%	27	0.6%		
General Merchandise Stores	5	0.7%	425	9.1%		
Food Stores	21	3.1%	261	5.6%		
Auto Dealers, Gas Stations, Auto Aftermarket	11	1.6%	52	1.1%		
Apparel & Accessory Stores	6	0.9%	49	1.0%		
Furniture & Home Furnishings	7	1.0%	21	0.4%		
Eating & Drinking Places	57	8.5%	918	19.6%		
Miscellaneous Retail	33	4.9%	113	2.4%		
Finance, Insurance, Real Estate Summary	130	19.4%	754	16.1%		
Banks, Savings & Lending Institutions	35	5.2%	42	0.9%		
Securities Brokers	2	0.3%	5	0.1%		
Insurance Carriers & Agents	2	0.3%	13	0.3%		
Real Estate, Holding, Other Investment Offices	91	13.6%	694	14.8%		
Services Summary	223	33.3%	1,437	30.6%		
Hotels & Lodging	11	1.6%	128	2.7%		
Automotive Services	15	2.2%	46	1.0%		
Motion Pictures & Amusements	32	4.8%	302	6.4%		
Health Services	21	3.1%	129	2.7%		
Legal Services	3	0.4%	9	0.2%		
Education Institutions & Libraries	8	1.2%	406	8.7%		
Other Services	131	19.6%	418	8.9%		
Government	6	0.9%	93	2.0%		
Unclassified Establishments	29	4.3%	62	1.3%		
Totals	669	100.0%	4,693	100.0%		

Source: Copyright 2015 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

BUSINESS SUMMARY

RETAIL ANALYSIS

Gibbs Planning Group

Business Summary

Perdido Key Primary Trade Area
Area: 66.24 square miles

Prepared by Esri
Latitude: 30.33719647
Longitude: -87.4173250

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	2	0.3%	3	0.1%
Mining	0	0.0%	0	0.0%
Utilities	0	0.0%	0	0.0%
Construction	56	8.4%	195	4.2%
Manufacturing	10	1.5%	52	1.1%
Wholesale Trade	11	1.6%	39	0.8%
Retail Trade	90	13.5%	947	20.2%
Motor Vehicle & Parts Dealers	10	1.5%	45	1.0%
Furniture & Home Furnishings Stores	5	0.7%	14	0.3%
Electronics & Appliance Stores	2	0.3%	7	0.1%
Bldg Material & Garden Equipment & Supplies Dealers	7	1.0%	27	0.6%
Food & Beverage Stores	21	3.1%	271	5.8%
Health & Personal Care Stores	11	1.6%	45	1.0%
Gasoline Stations	1	0.1%	7	0.1%
Clothing & Clothing Accessories Stores	7	1.0%	51	1.1%
Sport Goods, Hobby, Book, & Music Stores	7	1.0%	23	0.5%
General Merchandise Stores	5	0.7%	425	9.1%
Miscellaneous Store Retailers	12	1.8%	29	0.6%
Nonstore Retailers	1	0.1%	3	0.1%
Transportation & Warehousing	14	2.1%	53	1.1%
Information	15	2.2%	71	1.5%
Finance & Insurance	41	6.1%	61	1.3%
Central Bank/Credit Intermediation & Related Activities	35	5.2%	42	0.9%
Securities, Commodity Contracts & Other Financial	3	0.4%	6	0.1%
Insurance Carriers & Related Activities	2	0.3%	13	0.3%
Real Estate, Rental & Leasing	109	16.3%	726	15.5%
Professional, Scientific & Tech Services	50	7.5%	108	2.3%
Legal Services	4	0.6%	11	0.2%
Management of Companies & Enterprises	0	0.0%	0	0.0%
Administrative & Support & Waste Management & Remediation	33	4.9%	78	1.7%
Educational Services	9	1.3%	392	8.4%
Health Care & Social Assistance	25	3.7%	158	3.4%
Arts, Entertainment & Recreation	26	3.9%	336	7.2%
Accommodation & Food Services	69	10.3%	1,047	22.3%
Accommodation	11	1.6%	128	2.7%
Food Services & Drinking Places	58	8.7%	920	19.6%
Other Services (except Public Administration)	74	11.1%	273	5.8%
Automotive Repair & Maintenance	10	1.5%	28	0.6%
Public Administration	6	0.9%	93	2.0%
Unclassified Establishments	29	4.3%	62	1.3%
Total	669	100.0%	4,693	100.0%

Source: Copyright 2015 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

Gibbs Planning Group

Housing Profile

Perdido Key Primary Trade Area
Area: 66.24 square miles

Prepared by Esri
Latitude: 30.33719647
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Population		Households	
2010 Total Population	21,942	2015 Median Household Income	\$58,228
2015 Total Population	22,651	2020 Median Household Income	\$66,979
2020 Total Population	23,540	2015-2020 Annual Rate	2.84%
2015-2020 Annual Rate	0.77%		

Housing Units by Occupancy Status and Tenure	Census 2010		2015		2020	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	15,086	100.0%	15,751	100.0%	16,344	100.0%
Occupied	8,751	58.0%	9,117	57.9%	9,515	58.2%
Owner	5,977	39.6%	5,847	37.1%	6,100	37.3%
Renter	2,774	18.4%	3,270	20.8%	3,415	20.9%
Vacant	6,335	42.0%	6,635	42.1%	6,829	41.8%

Owner Occupied Housing Units by Value	2015		2020	
	Number	Percent	Number	Percent
Total	5,848	100.0%	6,100	100.0%
<\$50,000	142	2.4%	61	1.0%
\$50,000-\$99,999	447	7.6%	201	3.3%
\$100,000-\$149,999	1,074	18.4%	574	9.4%
\$150,000-\$199,999	1,525	26.1%	1,439	23.6%
\$200,000-\$249,999	885	15.1%	1,206	19.8%
\$250,000-\$299,999	581	9.9%	844	13.8%
\$300,000-\$399,999	550	9.4%	719	11.8%
\$400,000-\$499,999	239	4.1%	395	6.5%
\$500,000-\$749,999	227	3.9%	367	6.0%
\$750,000-\$999,999	80	1.4%	151	2.5%
\$1,000,000+	98	1.7%	143	2.3%
Median Value		\$191,344		\$232,131
Average Value		\$244,789		\$297,258

Data Note: Persons of Hispanic Origin may be of any race.
Source: U.S. Census Bureau, Census 2010 Summary File 1.

HOUSING PROFILE

RETAIL ANALYSIS

Gibbs Planning Group

Housing Profile

Perdido Key Primary Trade Area
Area: 66.24 square miles

Prepared by Esri
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Census 2010 Owner Occupied Housing Units by Mortgage Status		
	Number	Percent
Total	5,977	100.0%
Owned with a Mortgage/Loan	4,400	73.6%
Owned Free and Clear	1,577	26.4%

Census 2010 Vacant Housing Units by Status		
	Number	Percent
Total	6,335	100.0%
For Rent	1,603	25.3%
Rented- Not Occupied	27	0.4%
For Sale Only	438	6.9%
Sold - Not Occupied	56	0.9%
Seasonal/Recreational/Occasional Use	4,121	65.1%
For Migrant Workers	0	0.0%
Other Vacant	183	2.9%

Census 2010 Occupied Housing Units by Age of Householder and Home Ownership			
	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	8,751	5,977	68.3%
15-24	502	59	11.8%
25-34	1,382	500	36.2%
35-44	1,457	903	62.0%
45-54	1,919	1,453	75.7%
55-64	1,655	1,403	84.8%
65-74	1,130	1,021	90.4%
75-84	557	503	90.3%
85+	149	135	90.6%

Census 2010 Occupied Housing Units by Race/Ethnicity of Householder and Home Ownership			
	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	8,751	5,978	68.3%
White Alone	7,518	5,327	70.9%
Black/African American	692	331	47.8%
American Indian/Alaska	66	44	66.7%
Asian Alone	182	132	72.5%
Pacific Islander Alone	12	7	58.3%
Other Race Alone	97	38	39.2%
Two or More Races	184	99	53.8%
Hispanic Origin	391	196	50.1%

Census 2010 Occupied Housing Units by Size and Home Ownership			
	Occupied Units	Owner Occupied Units	
		Number	% of Occupied
Total	8,752	5,978	68.3%
1-Person	1,939	1,265	65.2%
2-Person	3,386	2,557	75.5%
3-Person	1,498	959	64.0%
4-Person	1,197	755	63.1%
5-Person	502	317	63.1%
6-Person	155	84	54.2%
7+ Person	75	41	54.7%

Data Note: Persons of Hispanic Origin may be of any race.
Source: U.S. Census Bureau, Census 2010 Summary File 1.

Tapestry Segmentation Area Profile

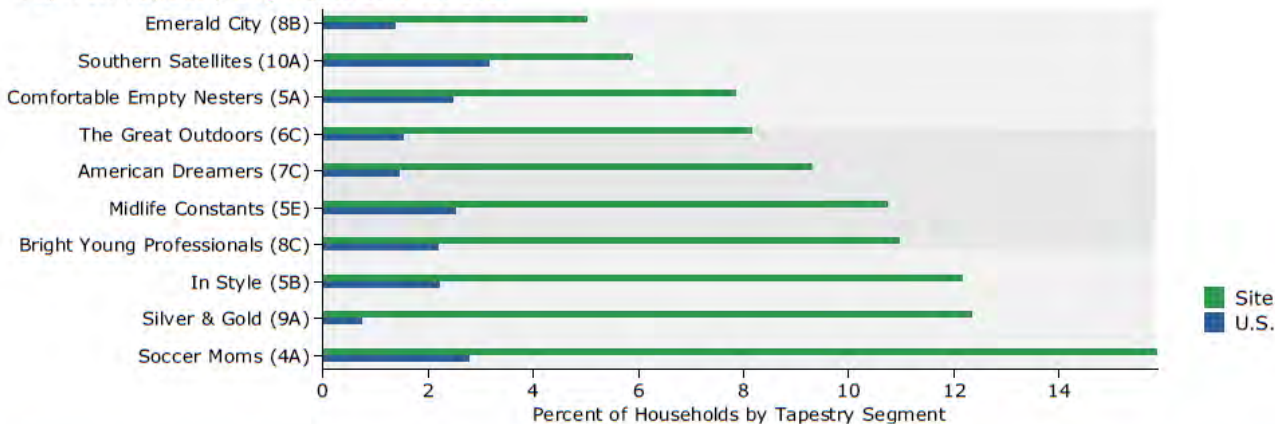
Perdido Key Primary Trade Area
 Area: 66.24 square miles

Prepared by Esri
 Latitude: 30.33719647
 Longitude: -87.4173250

Top Twenty Tapestry Segments

Rank	Tapestry Segment	2015 Households		2015 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	Soccer Moms (4A)	15.9%	15.9%	2.8%	2.8%	564
2	Silver & Gold (9A)	12.4%	28.3%	0.8%	3.6%	1,647
3	In Style (5B)	12.2%	40.5%	2.3%	5.9%	541
4	Bright Young Professionals (8C)	11.0%	51.5%	2.2%	8.1%	499
5	Midlife Constants (5E)	10.8%	62.3%	2.5%	10.6%	423
	Subtotal	62.3%		10.6%		
6	American Dreamers (7C)	9.3%	71.6%	1.5%	12.1%	636
7	The Great Outdoors (6C)	8.2%	79.8%	1.6%	13.7%	524
8	Comfortable Empty Nesters (5A)	7.9%	87.7%	2.5%	16.2%	315
9	Southern Satellites (10A)	5.9%	93.6%	3.2%	19.4%	187
10	Emerald City (8B)	5.0%	98.6%	1.4%	20.8%	357
	Subtotal	36.3%		10.2%		
11	Down the Road (10D)	1.5%	100.1%	1.1%	21.9%	134
	Subtotal	1.5%		1.1%		
	Total	100.0%		21.8%		459

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or population in the area, by Tapestry segment, to the percent of households or population in the United States, by segment. An index of 100 is the US average.
Source: Esri

TAPESTRY SEGMENTATION

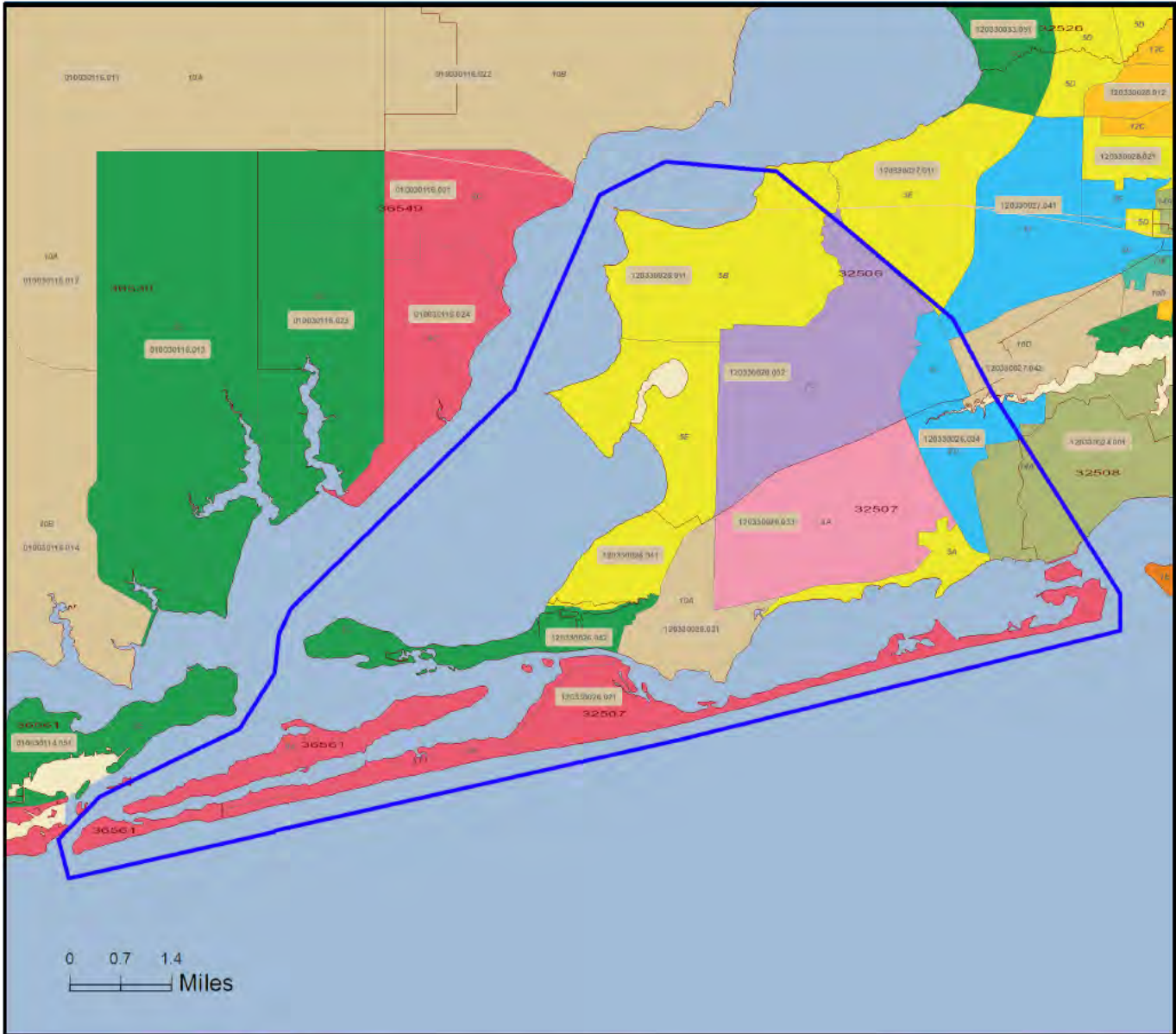
RETAIL ANALYSIS

Gibbs Planning Group

Dominant Tapestry Map

Perdido Key Primary Trade Area
Area: 66.24 square miles

Prepared by Esri



Tapestry LifeMode

- | | |
|---|---|
| ■ L1: Affluent Estates | ■ L8: Middle Ground |
| ■ L2: Upscale Avenues | ■ L9: Senior Styles |
| ■ L3: Uptown Individuals | ■ L10: Rustic Outposts |
| ■ L4: Family Landscapes | ■ L11: Midtown Singles |
| ■ L5: GenXurban | ■ L12: Hometown |
| ■ L6: Cozy Country | ■ L13: Next Wave |
| ■ L7: Ethnic Enclaves | ■ L14: Scholars and Patriots |



Source: Esri

Dominant Tapestry Map

Perdido Key Primary Trade Area
 Area: 66.24 square miles

Prepared by Esri

Tapestry Segmentation

Tapestry Segmentation represents the fifth generation of market segmentation systems that began 30 years ago. The 67-segment Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic composition. Each segment is identified by its two-digit Segment Code. Match the two-digit segment labels on the map to the list below. Click each segment below for a detailed description.

- | | |
|---|---|
| Segment 1A (Top Tier) | Segment 8C (Bright Young Professionals) |
| Segment 1B (Professional Pride) | Segment 8D (Downtown Melting Pot) |
| Segment 1C (Boomburbs) | Segment 8E (Front Porches) |
| Segment 1D (Savvy Suburbanites) | Segment 8F (Old and Newcomers) |
| Segment 1E (Exurbanites) | Segment 8G (Hardscrabble Road) |
| Segment 2A (Urban Chic) | Segment 9A (Silver & Gold) |
| Segment 2B (Pleasantville) | Segment 9B (Golden Years) |
| Segment 2C (Pacific Heights) | Segment 9C (The Elders) |
| Segment 2D (Enterprising Professionals) | Segment 9D (Senior Escapes) |
| Segment 3A (Laptops and Lattes) | Segment 9E (Retirement Communities) |
| Segment 3B (Metro Renters) | Segment 9F (Social Security Set) |
| Segment 3C (Trendsetters) | Segment 10A (Southern Satellites) |
| Segment 4A (Soccer Moms) | Segment 10B (Rooted Rural) |
| Segment 4B (Home Improvement) | Segment 10C (Diners & Miners) |
| Segment 4C (Middleburg) | Segment 10D (Down the Road) |
| Segment 5A (Comfortable Empty Nesters) | Segment 10E (Rural Bypasses) |
| Segment 5B (In Style) | Segment 11A (City Strivers) |
| Segment 5C (Parks and Rec) | Segment 11B (Young and Restless) |
| Segment 5D (Rustbelt Traditions) | Segment 11C (Metro Fusion) |
| Segment 5E (Midlife Constants) | Segment 11D (Set to Impress) |
| Segment 6A (Green Acres) | Segment 11E (City Commons) |
| Segment 6B (Salt of the Earth) | Segment 12A (Family Foundations) |
| Segment 6C (The Great Outdoors) | Segment 12B (Traditional Living) |
| Segment 6D (Prairie Living) | Segment 12C (Small Town Simplicity) |
| Segment 6E (Rural Resort Dwellers) | Segment 12D (Modest Income Homes) |
| Segment 6F (Heartland Communities) | Segment 13A (International Marketplace) |
| Segment 7A (Up and Coming Families) | Segment 13B (Las Casas) |
| Segment 7B (Urban Villages) | Segment 13C (NeWest Residents) |
| Segment 7C (American Dreamers) | Segment 13D (Fresh Ambitions) |
| Segment 7D (Barrios Urbanos) | Segment 13E (High Rise Renters) |
| Segment 7E (Valley Growers) | Segment 14A (Military Proximity) |
| Segment 7F (Southwestern Families) | Segment 14B (College Towns) |
| Segment 8A (City Lights) | Segment 14C (Dorms to Diplomas) |
| Segment 8B (Emerald City) | Segment 15 (Unclassified) |

Source: Esri

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