
S E C T O R S U R V E Y S

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A. Chapter Summary

The study team wanted to test the basic hypothesis that the VRE might lead to land use changes against a cross-section of public and private sector individuals involved with land use activities. Perceptions by informed individuals might provide insights into the complex system of rail-land use inter-relationships. The study team felt that certain sectors would be well positioned to experience rail-related affects on particular real estate markets or related activities. Nine business and/or political sectors involved with land use activities were selected that might have special awareness of the actual or potential impacts of the VRE on local land use. A set of nine surveys was developed to collect a base of informed perceptions to be used for comparisons when the Phase II study is conducted. Each survey contained a core of six common questions. Additional questions were tailored to each sector's particular area of expertise to identify unique impacts, observations or projections. A total of 1,213 surveys were mailed and 178 were returned. The overall response rate was 15 percent, although individual sector response rates varied.

What definition of distance the respondents considered "near" to a VRE station was important to the survey. The definitions had land use planning and impact management implications when compared with the VRE Ridership Survey responses and the Home Purchasers' Survey responses. Seventy percent of 167 respondents defined "near" as five miles or less from a station. The 70 percent were almost equally di-

vided between definitions of less than two miles and "2-5 miles." There were 22 percent (37 respondents) who defined "near" as up to 10 miles, and eight percent whose answers ranged from 10 to greater than 20 miles. The definitions reflected locational differences, with respondents from the more exurban areas having definitions which included greater distances.

A pair of questions asked if the respondent had noticed greater land use activity near VRE stations, and if so, did the respondent attribute the greater activity to VRE influence. A majority of respondents answered affirmatively to both questions, although 27 percent (49 respondents) did not believe the VRE was the cause of the increased real estate activity.

An overwhelming majority, 77 percent of 182 respondents, believed that instituting feeder or shuttle services to VRE stations would stimulate real estate activity in areas near VRE stations. The various sectors generally agreed that increased density, mixed uses, and employment zoning were land uses they would prefer to see designated near VRE stations.

Assessor/Appraiser sector respondents had noticed some sales price changes in properties near VRE stations. They did not, however, attribute the price changes to demand generated by rail access.

B. Survey Goal and Identification of Sectors

The primary goal of the surveys was to solicit opinions from individuals, groups or business sectors within the VRE study area. Sector representatives were sought who were judged to have informed knowledge of and opinions on the potential influences of the VRE on land use patterns, real estate values and economic development. Nine sectors were identified to be surveyed and/or interviewed:

- local elected officials, especially those representing electoral districts in the various PCAs;
- local Planning Commission members of VRE study area jurisdictions;
- senior planning and zoning staff persons of VRE study area jurisdictions;
- directors of Economic Development Offices of VRE study area jurisdictions;
- real estate appraisers;
- local Chambers of Commerce officials;
- professional Realtors and agents specializing in resales of existing houses;
- on-site and/or new home sales agents (real estate agents or employees of home building companies), and
- real estate developers and home builders.

Individuals from each sector were identified who conducted business activity in, represented, or worked for

localities which were part of the VRE study area. NVPDC identified elected and staff individuals from local governments comprising its member jurisdictions. The RADCO Planning District Commission provided names of local officials, real estate agents and developers within Fredericksburg, and Stafford and Spotsylvania Counties. The Appraisal Institute's Washington area chapter provided names of its members. Appraisers with zip codes within the PCAs were identified for survey. Real estate offices and new homes communities within defined PCAs were located with the assistance of the local Associations of Realtors, home builder associations, and Housing Data Reports of Washington, DC.

C. Survey Forms

Individual survey forms were developed for each sector. A core of six common questions were included in each sector survey; however, the remaining questions differed depending on the specific information being solicited from each group see (Appendix B). A small number of persons in each sector were surveyed by telephone, and an even smaller number of individuals were surveyed in person.

D. Size of Surveyed Sectors

A total of 1,213 surveys were sent to individuals in the nine sectors. The largest group of surveys was sent to real estate agents, with 822 surveys being sent through

274 real estate offices from Fairfax County to Spotsylvania County. Fifty-seven surveys were sent to local elected officials, 71 to Planning Commissioners, and 21 to senior staff persons of local planning and zoning departments. Ninety-nine residential appraisers and assessors were surveyed. Sixty-four surveys were sent to new homes and on-site sales agents. Sixty-eight real estate developers and home builders were sent surveys. Surveys were also sent to the Economic Development office directors of the five study counties and to the five senior officials of the Chambers of Commerce in the study area. Some of the sectors were not sufficiently large to form a valid survey; however, each sector was felt to have the potential of providing a unique perspective on the perceived and projected impacts of the VRE. Phase II surveys to the same sectors or executive director positions might provide interesting comparisons of impacts which might not be revealed through the variables described earlier in this study.

There were 178 responses to the 1,213 surveys sent out—an overall response rate of 15 percent. Many of the respondents did not answer each question.

E. Core Questions

A core of common questions was included in the surveys to all sectors. The six questions had been included in the VRE Ridership Survey. Answers to the six questions would identify similarities or differences, opin-

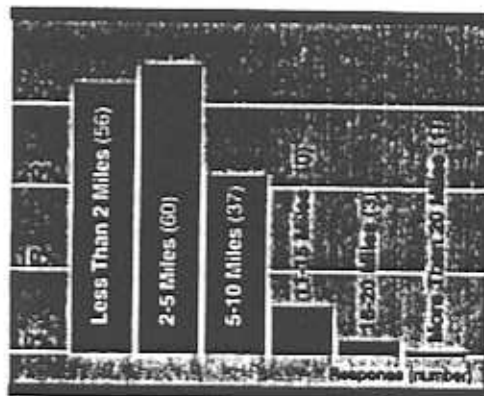
ions, and predictions of the effects of the VRE on the various sectors. A discussion of the six core questions and their responses follows.

1. What would you consider "near" to a VRE station when you are considering the impact of development? (Check One Each Row)
 Miles 0-2 2-5 5-10 11-15 16-20
 ≥ 20
 Minutes <15 15-29 30-44 45-60
 >60

sponses to the first part of this question. The majority defined "near" in distance as fewer than five miles from a station. Thirty-four percent felt that "near" had to be defined as fewer than two miles from a rail station; 36 percent felt that "near" could be from two to five miles from a station (see Figure 25). Twenty-two percent of respondents answered that "near" could be from 5-10 miles from a VRE station. Much smaller percentages felt that "near" could be greater than 10 miles. Six percent said 11-15 miles; two percent answered 16-20 miles. Only one person thought "near" could exceed 20 miles.

Figure 25

"In miles, what would you consider 'near' to a VRE station when you are considering impact on development?"



Source: NVPDC Sector Survey, May, 1993.

The interpretation of what is considered "near" to VRE by all those surveyed was a means of gauging the perceived VRE "sphere of influence." There were 167 re-

Some locational differences in defining "near" were apparent among real estate agents. Those agents closer to the I-495 Beltway had a stricter interpretation of "near." Fairfax County's real estate participants were divided into two divisions similar to the PCA and CCA locations. Of the 33 respondents from both divisions, 19 felt that "near" should be defined as fewer than two miles, and 12 felt that "near" could be defined as up to five miles away from a VRE station. Only two respondents, both in the western division of the Fairfax survey, felt that "near" could be greater than five miles.

In both east and west survey divisions of Prince William County, the numbers from real estate agents reflected a more liberal definition of "near." Eight answered that fewer than two miles was "near," with 10

choosing 2-5 miles, and 13 answering up to 10 miles. In eastern Prince William, only two respondents answered that more than 10 miles was "near." The more liberal definition of the western division respondents may have reflected the lack of geographical constraints to travel and access to their VRE stations. The eastern division had the Potomac River as a boundary and the large Prince William Forest and Quantico Marine Corps Base forming barriers which kept travel to I-95 and VRE stations relatively confined in terms of distance.

In the Fredericksburg survey area, the majority of real estate agents felt that "near" should be defined as between 2-5 miles. The other options were answered evenly with two responses each.

Among the other sectors there were no strong differences in interpretation of "near" in distance. Instead, the patterns were very consistent among the remaining sector responses.

The interpretation of "near" *in time* to a VRE station was more uniform throughout the study area. (See Figure 27.) Sixty-five percent—158 respondents—answered less than 15 minutes from a station was "near." Thirty-two percent of the respondents felt that up to 29 minutes was "near." Two percent said that "near" could be between 30-44 minutes away, and less than one percent said up to 60 minutes travel time was "near."

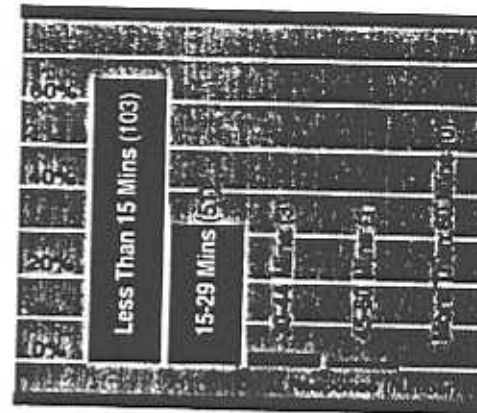


Figure 26
"In minutes, what would you consider 'near' to a VRE station when you are considering impact on development?"

Source: NVPDC Sector Survey, May, 1993.

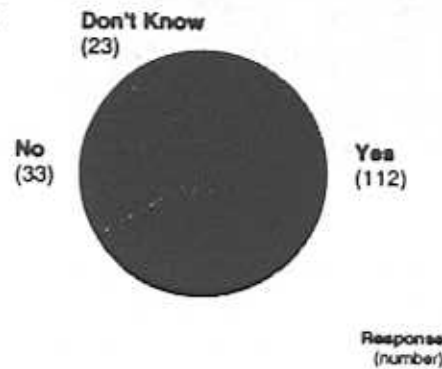
2. Have you noticed any increased activity (business inquiries, land use applications, construction) by individuals (home buyers, landowners), real estate agents (residential, commercial), home builders and/or developers, or other businesses "near" VRE stations?
 Yes ___ No ___ Don't Know ___

Answers from 168 respondents were received to this question. Two-thirds of respondents stated that they had seen increased interest in properties near VRE stations. Twenty percent answered "No," and 14 percent answered "Don't Know." This distribution was consistent throughout most of the surveyed sectors, except for new homes agents and developers/builders. Twenty new homes agents answered this question. Nine said "Yes," eight said "No," and three answered "Don't

Know." Fourteen developers and builders answered this question. Only two said "Yes," nine answered "No," and three did not know (see Figure 28). The answers may reflect sector interests, with the observed activity

Figure 27

"Have you noticed any increased activity by individuals, real estate agents, homebuilders and/or developers, or other businesses 'near' VRE stations?"



Source: NVPDC Sector Survey, May, 1993.

showing up more in individual home or lot sales than in large scale development or construction activity of interest to builders.

3. *Do you relate this increased interest primarily to VRE commuter access?* (See Question 2, above)
 Yes ___ No ___ Don't Know ___

When asked if the increased interest in properties near VRE was attributable to VRE, as asked in Question 2, the majority of respondents answered in the affirma-

tive, but not as overwhelmingly as those who had seen such an increase (see Figure 28). Of the 147 responses, 52 percent answered "Yes"; 27 percent answered "No," and 20 percent answered "Don't Know." The distribution of responses throughout the surveyed sectors and throughout the survey area was generally consistent. There was only one sectoral difference. The Developers/Builders differed from the overall pattern. Only two of the 14 Developer/Builder respondents felt that they could attribute what increased interest they had seen to VRE influence. Nine said "No," and three answered "Don't Know."

4. *Would the availability of bus or shuttle service to a VRE station increase interest?* (See Question 2, above)
 Yes ___ No ___ Don't Know ___

Of those surveyed, 155 responded to this question. A large majority answered that such a shuttle service could make a major difference (see Figure 29). Seventy-seven percent answered "Yes;" they felt that feeder service could increase interest in those areas and properties near VRE. Only five percent answered "No," and 18 percent said "Don't Know." Survey support for the concept of shuttle service was indicated among all the sectors and throughout the survey area.

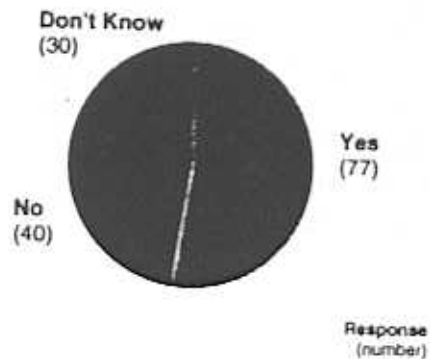
5. *How do you compare interest in properties near VRE stations to locations which are not near VRE sta-*

tions? (Check One)
 Significant ___ Moderate ___ Minimal ___
 Don't Know ___

One-hundred-seventy respondents answered this question (see Figure 30). The largest group, 44 percent, felt that the interest in properties near VRE was "Moderate" compared to locations not near commuter rail access. However, 26 percent said there was "Significant" interest in being near the VRE. Eighteen percent felt there was "Minimal" interest.

Figure 28

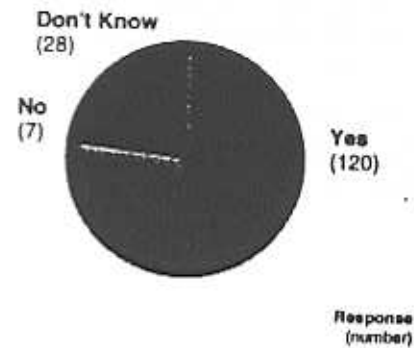
"Would you relate this increased interest primarily to VRE commuter access?"



Source: NVPDC Sector Survey, May, 1993.

Figure 29

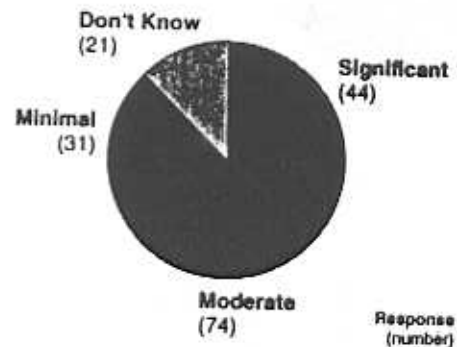
"Would the availability of bus or shuttle service to a VRE station increase interest?"



Source: NVPDC Sector Survey, May, 1993.

Figure 30

"How do you compare interest in properties near VRE stations to locations which are not near stations?"

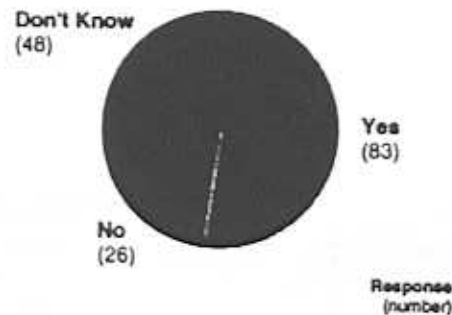


Source: NVPDC Sector Survey, May, 1993.

6. *VRE presently offers 4 inbound morning trains from Manassas and Fredericksburg into Washington and 4 outbound trains in the afternoon. Would expanded two-way service on VRE increase interest more than you have already discussed. (Note. This question was not directed to Appraisers/Assessors)*
 Yes ___ No ___ Don't Know ___

Figure 31

"Would expanded two-way service on VRE increase interest more than you have already discussed?"



Source: NVPDC Sector Survey, May, 1993.

This question related to a policy and operations question under consideration by the VRE and its sponsoring agencies. The focus of the survey question was on the

effect of two-way rail service on generating greater real estate interest. Greater interest would indicate the potential for more land use change. This question was answered by 157 respondents. Fifty-three percent said "Yes," expanded service would increase real estate interest (see Figure 31). Seventeen percent said "No," and 31 percent did not know. Comments offered by the respondents indicated that they had differing ideas of what expanded service should be. Many said that more trains and a better schedule were needed for inbound trains in the morning and outbound in the afternoon. Only a few respondents indicated in attached comments that two-way service, both in the morning and afternoon, was warranted.

F. Summary of Survey Responses by Sector

In addition to the six core questions, other study-related questions were included in the nine sector surveys. The additional questions were tailored to solicit information that would be relevant to the particular sector's knowledge or activities on which the VRE could have an influence. A summary of individual sector results from the survey are contained in Appendix B.